

Stripe CRM - Agile CRM

Stripe is a suite of APIs that powers commerce for businesses of all sizes. It is a developer-friendly way to accept payments online and in mobile apps.

Agile CRM integrates with Stripe to provide for a complete CRM billing solution to its end users. The Stripe CRM integration lets you track your customer payments, provides 2-way sync and Stripe event triggers for campaigns.

Here's a detailed setup description of the Agile's Stripe Integration:

1. Locate the Widget

Add the widget from the '+ Manage Widgets' button on any contact page, or go to the Preferences ---> Widgets and find the Stripe widget under the Billing section. Click on the '+Add' button to integrate your Stripe with Agile CRM.

Billing View and send invoices

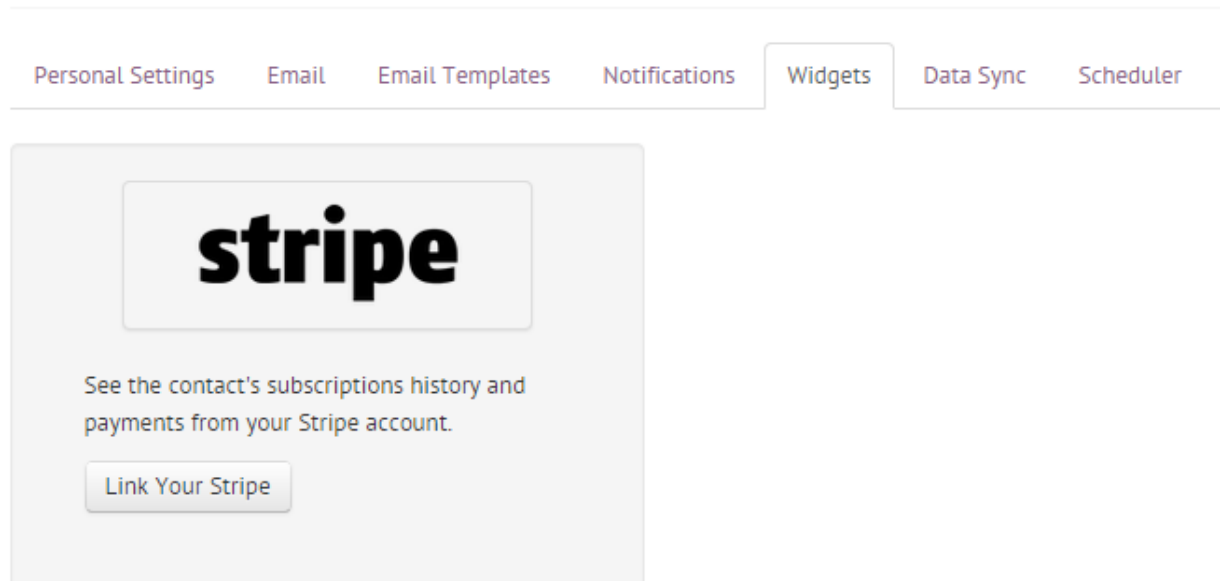
The screenshot displays the 'Billing' section of the Agile CRM interface, which includes a sub-header 'View and send invoices'. Below this, there are four widget cards, each with a logo, a brief description, and a '+ Add' button:

- FreshBooks**: Logo with a green leaf. Description: "FreshBooks enables the ability to create and manage invoices, estimates, expenses, and projects all in one place." Button: "+ Add".
- stripe**: Logo in lowercase. Description: "Stripe enables individuals and businesses to accept payments over the internet." Button: "+ Add".
- xero**: Logo in a blue circle. Description: "Xero is an online accounting software for small business - Explore invoicing, reconciliation anytime, anywhere." Button: "+ Add".
- intuit QuickBooks**: Logo with 'qb' in a green circle. Description: "Run your whole business better with QuickBooks wherever you are. Automate your invoicing, billing and..." Button: "+ Add".

2. Link your Stripe account

Upon clicking the '+Add' button, a new window opens up (as shown in the image). Click on the 'Link your Stripe' button & it takes you to a new window where you have to Sign in to Stripe to connect with Agile. Login to your Stripe account.

Preferences




3. Select your Current Custom field

Upon login, you are again directed to Agile dashboard (shown in the image) where you have to select your current custom field. (If you haven't created any custom field yet, click on the 'Create Custom field' button over there, or go to Admin Settings---> Custom fields and create a custom text field with some label.) On choosing your custom field, save your settings to finalize your integration. That's it! Your Agile's Stripe Integration is set.

Preferences

Personal Settings Email Email Templates Notifications **Widgets** Data Sync Scheduler



Stripe id for each contact is stored in a text custom field. Select the custom field to be used.

Current custom field

-Select- ▼

Save Revoke Access Cancel

You can now go to any contact page to view/ manage their invoices, track their payment history and start billing them, right from Agile.

4. Setting up Stripe Event Trigger

You may run campaigns on your contacts when a Stripe Event occurs. You have to set-up webhooks to make use of this functionality. To create webhooks, follow the 'webhooks' link mentioned over there on the trigger panel.

<https://stripe.com/docs/webhooks#configuring-your-webhook-settings>

Stripe events - Charge succeeded, Charge failed, Charge refunded, Charge captured, Charge updated and Customer deleted.

Once you are done with setting up webhooks, go to Campaigns---> Manage Triggers & click on the '+Add Trigger' button. Select 'Stripe Event' under 'Payments' and select your required Stripe Event. Label the trigger and select the campaign that you want to run on your contact when the above mentioned condition is met. Save it and you are done!

+ Add Trigger

Name *

When this happens *

You need to [setup webhooks](#) in your stripe account for this

Run this Campaign on the Contact *

Related Links:

[Stripe - Agile CRM Billing Integration \(blog\)](#)

[FreshBooks - Agile CRM Integration](#)

[Xero - Agile CRM Integration](#)

[QuickBooks - Agile CRM Integration](#)