



Zoho Corporation

Z O H O

Invoices

The **Invoices** module helps you easily access all the [invoices](#) from a single place. You can create invoices, and make payments from here.



Available in Editions: **All Editions**

Create an Invoice

- ⓘ - **Permission Required:** [Invoices](#)
- Find out the Edition-specific limits for [Invoices](#).

To create an invoice:

1. Select **Invoices** from the **Work Order Management** menu and click **Create**.
2. Select the work order whose service line items you want to create the invoice for.

Create Invoice ✕

Choose Work Order

Name

WO14 - Test
● In Progress Service Jenny Stiles ● Not yet Invoiced

WO15 - Home Painting
● In Progress Service Lucy Robins Endeavour Pvt Ltd ● Not yet Invoiced

WO16 - TV wall mounting
● In Progress Service Lucy Robins Endeavour Pvt Ltd SONY Bravia 80.1 c... ● Not yet Invoiced

WO17 - TV wall mounting
● New Service Lucy Robins Endeavour Pvt Ltd SONY Bravia 80.1 c... ● Partially Invoiced

3. Select the service line items you want to create the invoice for and click **Next**.
If an invoice has been generated for a service line item, then that service line item cannot be selected.

Create Invoice
✕

Choose Work Order WO17- TV wall mounting ↻

Work Order Details

WO17 - TV wall mounting

● New
 🔗 Service
👤 Lucy Robins
🏢 Endeavour Pvt Ltd
📺 SONY Bravia 80.1 c...
●

● Partially Invoiced
 👤 Marianne Sheehan

[View More](#) ↗

Select the services to which you want to generate invoice. You can generate invoice(s) for a single service or combine two or more services and generate invoice.

	Service ID	Service Name	Service Appointment	Quantity
<input type="checkbox"/>	SVC-28	TV Installation	AP-21	1
<input checked="" type="checkbox"/>	SVC-30	TV Installation	-	1
<input type="checkbox"/>	SVC-31	TV Installation	-	1

Cancel
Next

4. Provide the necessary details and click **Generate Invoice**.

In the **Sales person** dropdown, the sales persons [added](#) in Zoho Books/Invoice will be listed under **Sales Persons** and all active Zoho FSM [users](#) will be listed under **FSM Resource**. The Payment Terms [set as default](#) for a customer in Zoho Books/Invoice will be populated here.

Create Invoice
✕

Invoice Summary

Invoice Date:

Payment Terms:

Due Date:

Sales person:

Services

Service	Line Item Amount
<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">TV Installation</div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">Add a Description</div>	210

Parts

The invoice will be created with the status **Draft**.

5. Click the invoice you want to send. Click **Send Invoice**.

You can also record the payment. Click **Open In ZohoInvoice** to view the invoice in Zoho Invoice. The billing address of the work order will be used here.

INV-000006 ×

 Open In ZohoBooks :

Draft

Zylker Appliances
California
U.S.A.

Bill To
Endeavour
14908 Cotton Blossom Ave
Bakersfield
93314 California
United States

INVOICE
INV-000006

Balance Due
\$210.00

Invoice Date : 21 Aug 2023
Terms : Due on Receipt
Due Date : 21 Aug 2023

#	Item & Description	Qty	Rate	Amount
1	TV Installation	1.00 Hours	200.00	200.00
Sub Total				200.00
Sales Tax (5%)				10.00
Total				\$210.00
Balance Due				\$210.00

Notes
Thanks for your business.

More Information

Created By Marianne Sheehan
Created Time Aug 21, 2023 11:16 AM
Work Order WO17

6. Click **Send** to dispatch the email.

By default, the checkbox for **Add Invoice PDF** will be selected. If you do not wish to include the invoice PDF in the email, deselect it. To rename the invoice PDF, click on its name and enter a new value. Click on **Attachments** to add any other files that you want to send in the invoice email. You can add up to three files each with a maximum size of 3 MB.

In the **To** field, you can use one of the following email addresses. Please note that all these email addresses will be fetched from your integrated finance organization.

- Contact email address
- Company email address
- Email addresses of the Company's Contacts

In the Cc and Bcc fields, along with the email addresses available in the **To** field, all active confirmed users will also be listed. To include any other email address, just type in the value and press **Enter**. In each of these fields, you can include a maximum of five email addresses.

Send Invoice ✕

From:

To: Bcc Cc ⓘ

subject:

Invoice #INV-000006

Dear Endeavour Pvt Ltd,

Thank you for your business. Your invoice can be viewed, printed and downloaded as PDF from the link below. You can also choose to pay it online.

INVOICE AMOUNT

\$210.00

Invoice No	INV-000006
Invoice Date	21 Aug 2023
Due Date	21 Aug 2023

PAY NOW

✓ Add Invoice PDF
📎 Attachments

Cancel Send

Add Salespersons

To add a salesperson in Zoho Books/Invoice:

1. In the *Create/Edit Invoice* page, click **Manage Salespersons** in the **Salesperson** field.

Invoice

🔍 Search in Invoices (/)

+
🔔
⚙️
Zylker
👤
☰

📄 New Invoice
⚙️ ✕ ?

Customer Name*

Invoice#*

Order Number

Invoice Date* **Terms** **Due Date**

Salesperson

Search

Kat Miller

⚙️ Manage Salespersons ←

Subject ⓘ

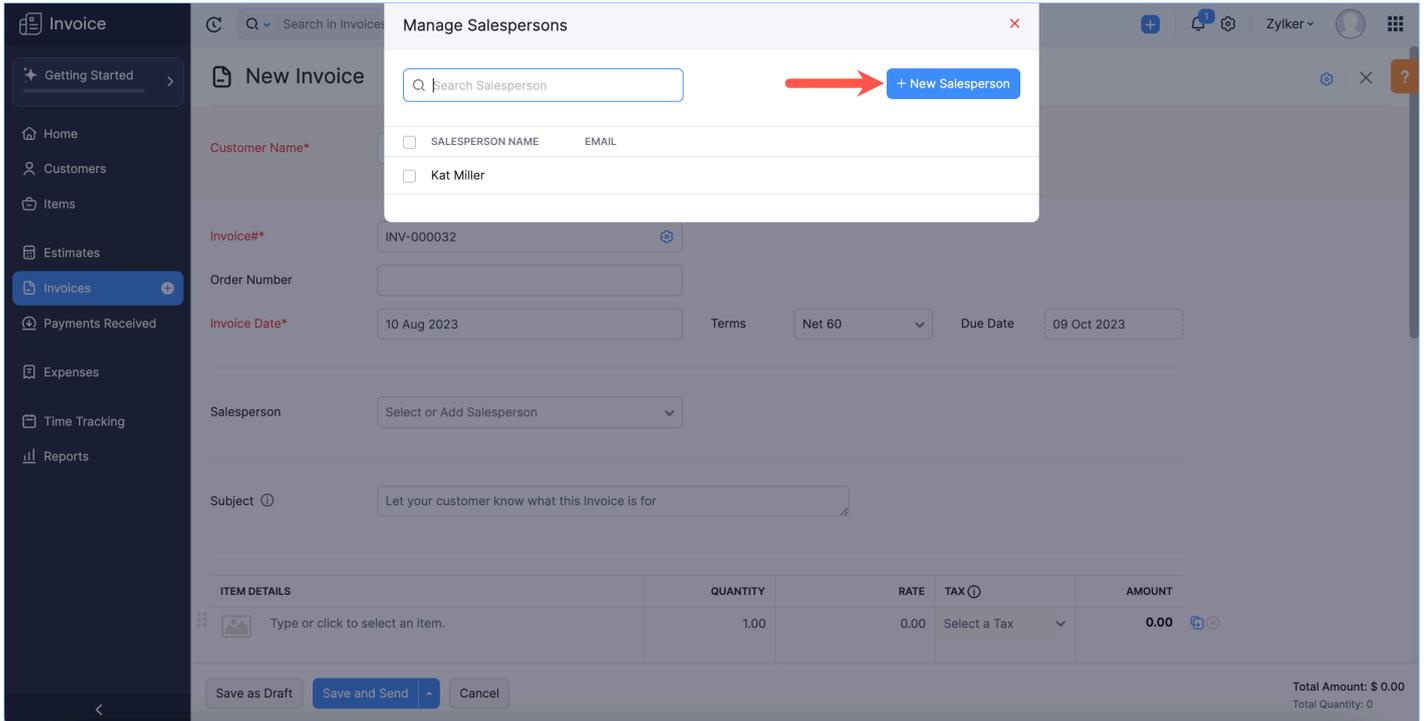
ITEM DETAILS	QUANTITY	RATE	TAX ⓘ	AMOUNT
🖼️ Type or click to select an item.	1.00	0.00	Select a Tax	0.00

Save as Draft
Save and Send
Cancel

Total Amount: \$ 0.00

Total Quantity: 0

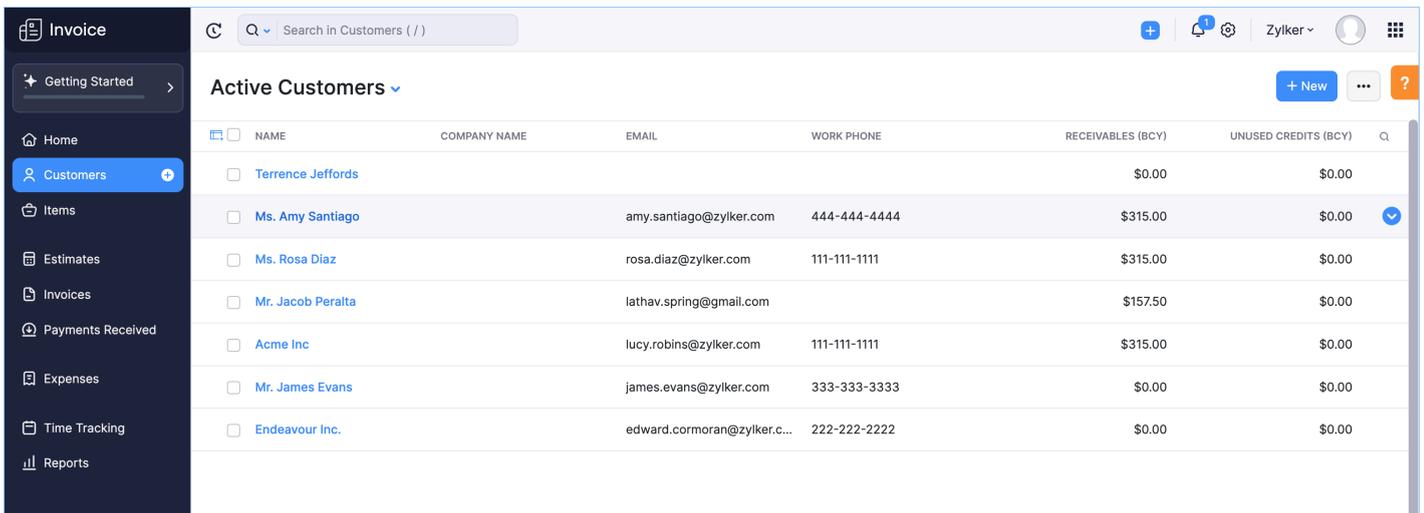
- In the **Manage Salespersons** popup, click **New Salesperson**.
Click **Save and Select** to add the newly created salesperson to the invoice.



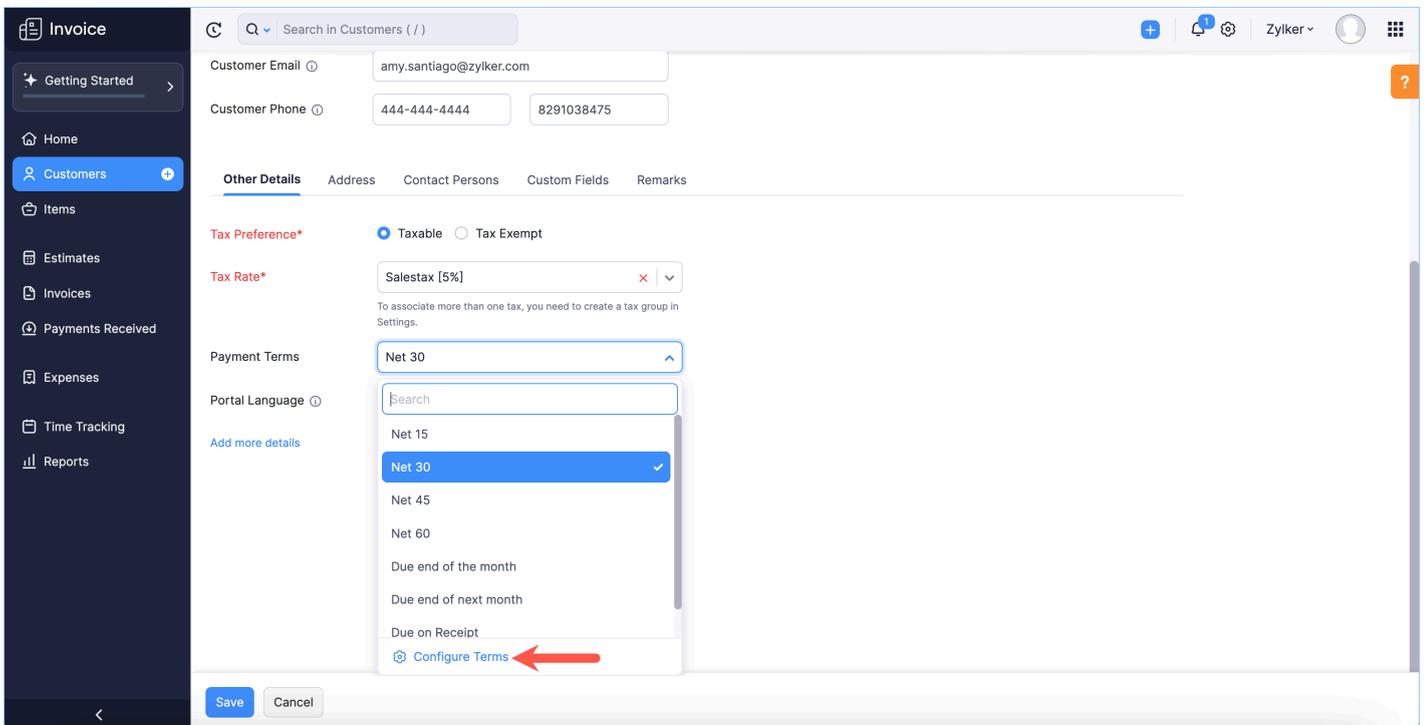
Set Default Payment Terms

To set a default payment term in Zoho Books/Invoice:

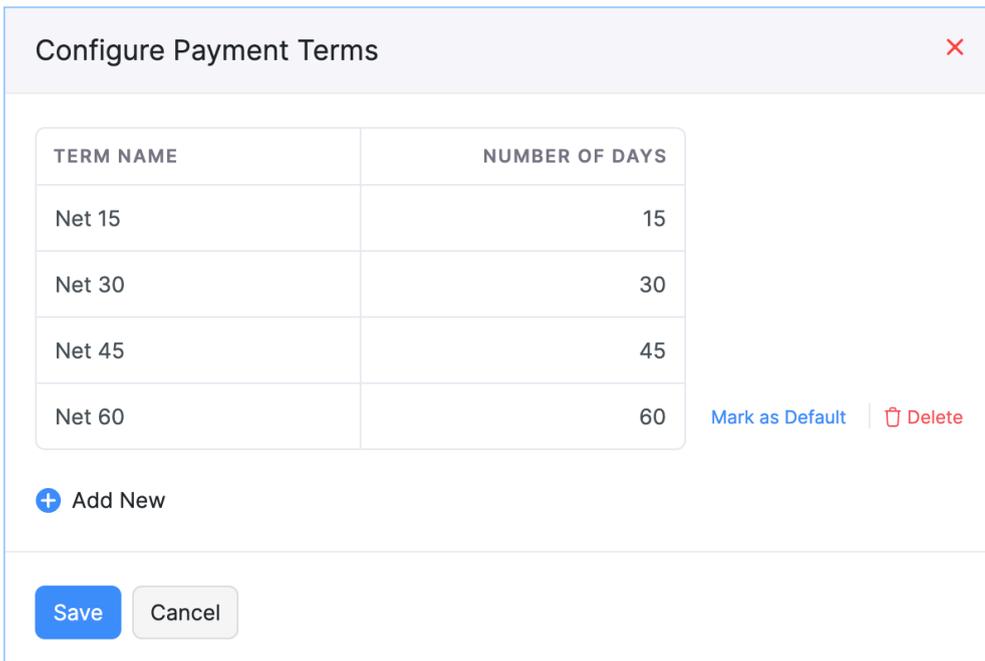
- In Zoho Books/Invoice, select the **Customers** menu from the left-hand side.



- Click a customer and **Edit** it.
- In the **Payment Terms** field, click **Configure Terms**.



4. Hover over the payment term and click **Mark as Default** and click **Save**.



5. Click **Save**.

The screenshot shows the 'Invoice' form in the Zylker system. The left sidebar contains navigation options: Getting Started, Home, Customers (selected), Items, Estimates, Invoices, Payments Received, Expenses, Time Tracking, and Reports. The main form area is titled 'Invoice' and includes a search bar for customers. The form fields are as follows:

- Company Name: [Empty text box]
- Customer Display Name*: Ms. Amy Santiago (dropdown)
- Currency: USD- United States Dollar (dropdown)
- Customer Email: amy.santiago@zylker.com (text box)
- Customer Phone: 444-444-4444 and 8291038475 (two text boxes)

Below these fields are tabs for 'Other Details', 'Address', 'Contact Persons', 'Custom Fields', and 'Remarks'. The 'Other Details' tab is active and contains:

- Tax Preference*: Taxable Tax Exempt
- Tax Rate*: Salestax [5%] (dropdown with a red 'x' icon)
- Payment Terms: Net 60 (dropdown)
- Portal Language: English (dropdown)

At the bottom of the form are 'Save' and 'Cancel' buttons. A small orange question mark icon is visible in the top right corner of the form area.

Make a Payment

You can record the details of the payment made for an invoice.

1. Select the **Invoices** module from the Work Order Management menu and click the invoice you want to record the payment for.
2. Click **Record Payment**.

Sent

Endeavour Pvt Ltd.
Colorado
U.S.A.

Invoice

INV-000159

Balance Due
\$21.40

Bill To
Endeavour
14908 Cotton Blossom Ave
Bakersfield
93314 California
United States

Invoice Date : 29 Apr 2024
Terms : Due On Receipt
Due Date : 29 Apr 2024

#	Item & Description	Qty	Rate	Tax %	Tax	Amount
1	TV Installation	1.00 Hours	20.00	7.00	1.40	20.00
Sub Total						20.00
Sales tax (7%)						1.40
Total						\$21.40
Balance Due						\$21.40

Notes

Thanks for your business.

Send Invoice

Record Payment

3. Click **Record Payment**.

Any custom field added to the **Payments Received** form in Zoho Books/Invoice will also be listed under the **Custom Fields** section.

Record Payment ✕

Customer Information

Company ✕ 

Contact ✕ 

Payment Summary

Amount Received

Bank Charges (if any)

Payment Date

Payment Mode 

Reference#

Notes

The status of the invoice changes to **Paid**. The reference number entered here will be updated in the corresponding invoice record in Books/Invoice.

The screenshot displays the Zoho Books interface for 'Endeavour Pvt Ltd.'. On the left is a navigation sidebar with categories like Home, Items, Banking, Sales, Customers, Quotes, Retainer Invoices, Packages, Shipments, Invoices, Payments Received, Sales Returns, Credit Notes, Purchases, Time Tracking, Accountant, Reports, and Documents. The 'Invoices' section is active, showing a list of invoices. The main area displays a specific invoice, 'INV-000159', for 'Endeavour Pvt Ltd.' with a balance due of \$0.00. Below the invoice, a 'Payments Received' table shows a payment of \$21.40 on 29 Apr 2024, with a reference number 'HDBI201866' highlighted in a red box. The invoice details include the company name, address, and a table of items: 'TV Installation' with a quantity of 1.00, rate of 20.00, tax of 7.00, and amount of 20.00.

Using Invoice Credits

Any excess amount paid by the customer (i.e. the amount that is not used to record payment for the invoices) will be available as invoice credits in Zoho FSM. These can be used later while recording invoice payment.

In Zoho Books/Invoice, record the excess payment made by the customer. To do so:

1. Navigate to **Sales > Payments Received** and click **New**.
2. In the **Customer Name** field, select the customer for whom you want to record the excess payment and in the **Amount Received** field, enter the amount. Click **Save**.

If there unpaid invoices present for this customer, a popover (**Would you like this amount to be reflected in the Payment field?**) will be shown. Click **No** for this amount to be considered as an excess payment.

Record Payment

Customer Name* Zylker Inc. [View Customer Details](#)

Branch Head Office

Amount Received* USD 300

Bank Charges (if any) Would you like this amount to be reflected in the Payment field?

Payment Date*

Payment #* 133

Payment Mode Cash

Deposit To* Petty Cash

Reference#

3. Click **Continue to Save**.

Excess Payment ✕

Would you like to store the excess amount of **\$300.00** as over payment from this customer?

Note: The excess amount will be deposited in the **Unearned Revenue**

This excess payment will be available as credits when you try to record payment for an invoice for this customer. To use the credits in Zoho FSM:

1. Select the **Invoices** module from the **Work Order Management** menu and click the invoice you want to record the payment for.
2. Click **Apply Now** in the **Available Credits** section displayed on top.

INV-000157 ✕

Available Credits ▼

📄 Credits Available: **\$300** Apply Now

[Open In ZohoBooks](#) ⋮

Overdue

Endeavour Pvt Ltd.
Colorado
U.S.A.

Bill To
Zylker Inc.
1339 Knox Hwy 25
Galesburg
61401 Illinois
United States

Invoice

INV-000157

Balance Due
\$79.60

Invoice Date : 25 Apr 2024
Terms : Due On Receipt
Due Date : 25 Apr 2024

#	Item & Description	Qty	Rate	Tax %	Tax	Amount
1	Leakage Repair SKU : LEV-JN-BL-WM	1.00 Hours	80.00	7.00	5.60	80.00
Sub Total						80.00
Sales tax (7%)						5.60
Total						\$85.60
Payment Made						(-) 6.00
Balance Due						\$79.60

Send Invoice
Record Payment

3. Enter the amount you want to use from the credits and click **Apply Credits**.

Apply credits for INV-000157 ✕

Credit Note#	Credit Note Date	Credit Amount	Credits Available	Amount To Credit
Excess Payment	29 Apr 2024	\$300.00	\$300.00	79.6

Amount to Credit: 79.6

Invoice Balance Due: 0

Cancel
Apply Credits

You can either use the credits to record the payment of the full invoice amount or a part of the invoice amount. After you use the credits to record the payment of only a part of the invoice amount, you can proceed to [record the payment](#) of the remaining amount.

Invoice Actions

The following options are available for an invoice under **more options** [⋮].

Download: You can download the invoice as a PDF

Print: You can print an invoice

Mark as Sent: When you email the invoice to the customer, the status of the invoice changes from *Draft* to *Sent*. If need be, you can mark the invoice as sent without sending the invoice to the customer. This option will be only available if the invoice is in the **Draft** state.

INV-000013 ✕

Draft

Zylker
Illinois
U.S.A

Bill To
ABC Services
901 1st St
Colona
61241 Illinois
United States

INVOICE
INV-000013

Balance Due
\$107.00

Invoice Date : 15 Jul 2022
Terms : Due end of the month
Due Date : 31 Jul 2022

#	Item & Description	Qty	Rate	Amount
1	Leakage Repair	1.00	80.00	80.00
	Hours			
2	Waterproof Tile Gap Filler	1.00	20.00	20.00
	Pack			
			Sub Total	100.00
			SalesTax (7%)	7.00
			Total	\$107.00
			Balance Due	\$107.00

Notes

Send InvoiceRecord Payment

