

Zoho Invoice: Create Invoice & Record Payment Guide

Part 1: Creating an Invoice in Zoho Invoice

Step 1: Access the Invoices Module

Navigate to 'Invoices' in the left sidebar.

Step 2: Initiate a New Invoice

Click '+ New' to create a new invoice.

Step 3: Select or Add a Customer

Choose an existing customer or click '+ New Customer'.

Step 4: Configure Invoice Details

Adjust invoice number, set invoice date and payment terms.

Step 5: Add Items or Services

Add existing items or create new ones, specify quantity and tax.

Step 6: Apply Discounts or Adjustments

Optional: add discounts or adjustments to invoice.

Step 7: Add Notes and Terms

Include notes and terms for the customer.

Step 8: Save or Send the Invoice

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Save as Draft or Send via email.

[Image: <https://www.zoho.com/invoice/help/images/invoice-module.png>]

[Image: <https://www.zoho.com/invoice/help/images/new-invoice-button.png>]

[Image: <https://www.zoho.com/invoice/help/images/select-customer.png>]

[Image: <https://www.zoho.com/invoice/help/images/invoice-details.png>]

[Image: <https://www.zoho.com/invoice/help/images/add-items.png>]

[Image: <https://www.zoho.com/invoice/help/images/discounts-adjustments.png>]

Part 2: Recording a Payment in Zoho Invoice

Step 1: Navigate to the Invoices Module

Access 'Invoices' from the left sidebar.

Step 2: Select the Invoice

Open the invoice to record payment.

Step 3: Record the Payment

Click 'Record Payment'.

Step 4: Enter Payment Details

Input amount, date, mode, deposit account, reference.

Step 5: Save the Payment

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Click 'Record Payment' to save.

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