

Managing Your Property Rent Using Zoho Invoices

Set up a free Zoho Invoices account at <https://www.zoho.com/invoice/>

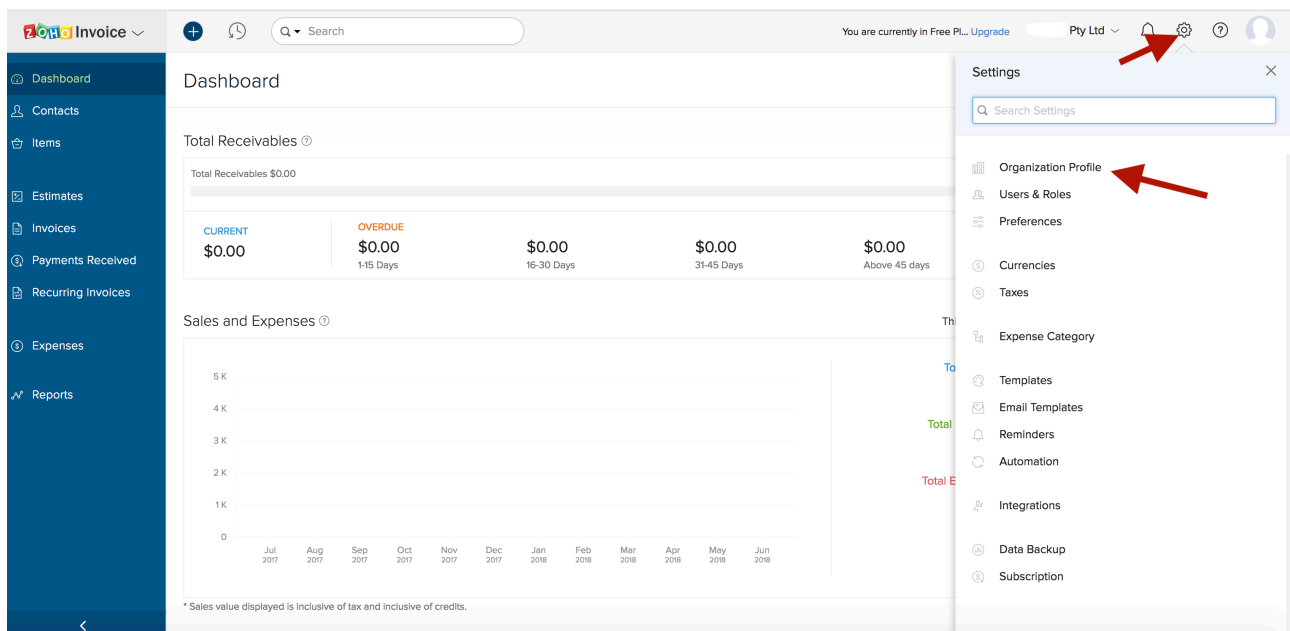
Create an Organisation and set up your profile

This should be the name in which you purchased the property.

For you, that may be your company trust, family trust, SMSF trust, your own name, or any other buying entity.

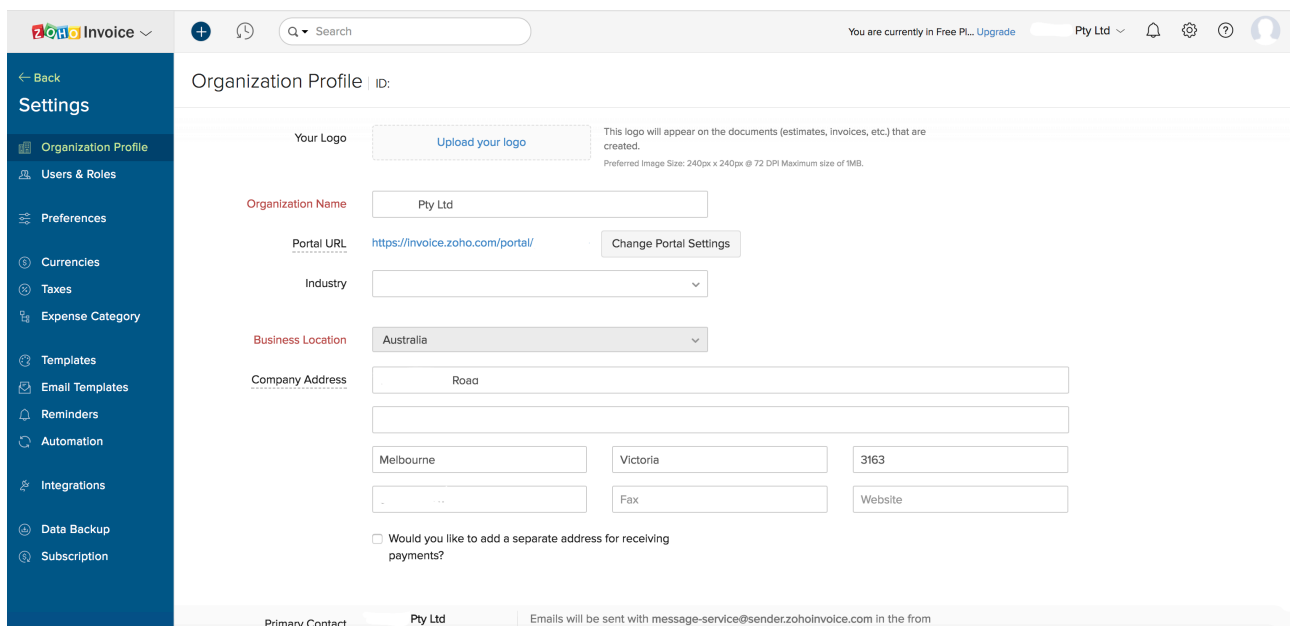
Go to Settings- the gear box in the upper RHS

Click on Organisation Profile



Add the company name (Remember: This should be the name in which you purchased the property.... For you, that may be your company trust, family trust, SMSF trust, your own name, or any other buying entity.)

Add the Address and contact details.



Add your time zone, Date format and your ABN if you have one.

The screenshot shows the 'Organization Profile' settings page in Zoho Invoice. The left sidebar contains a 'Settings' menu with options: Organization Profile, Users & Roles, Preferences, Currencies, Taxes, Expense Category, Templates, Email Templates, Reminders, Automation, Integrations, Data Backup, and Subscription. The main content area is titled 'Organization Profile | ID:'. It includes a 'Primary Contact' section with fields for 'Pty Ltd' and '#gmail.com', and a note about email service. Below this are dropdowns for 'Fiscal Year' (July - June), 'Time Zone' ((GMT 10:00) Eastern Standard Time (Victoria)(Australia/...)), and 'Date Format' (dd/MM/yyyy [20/11/2017]). There are also input fields for 'Company ID', 'Tax ID', and 'Additional Fields' (with 'ABN' entered). A 'Save' button is at the bottom. A 'Privacy Policy' link is also visible.

Organization Profile | ID:

Primary Contact: Pty Ltd, #gmail.com. Emails will be sent with message-service@sender.zohoinvoice.com in the from field. [Change](#)

[Configure Emails](#)

Fiscal Year: July - June

Time Zone: (GMT 10:00) Eastern Standard Time (Victoria)(Australia/...

Date Format: dd/MM/yyyy [20/11/2017]

Company ID: Company ID :

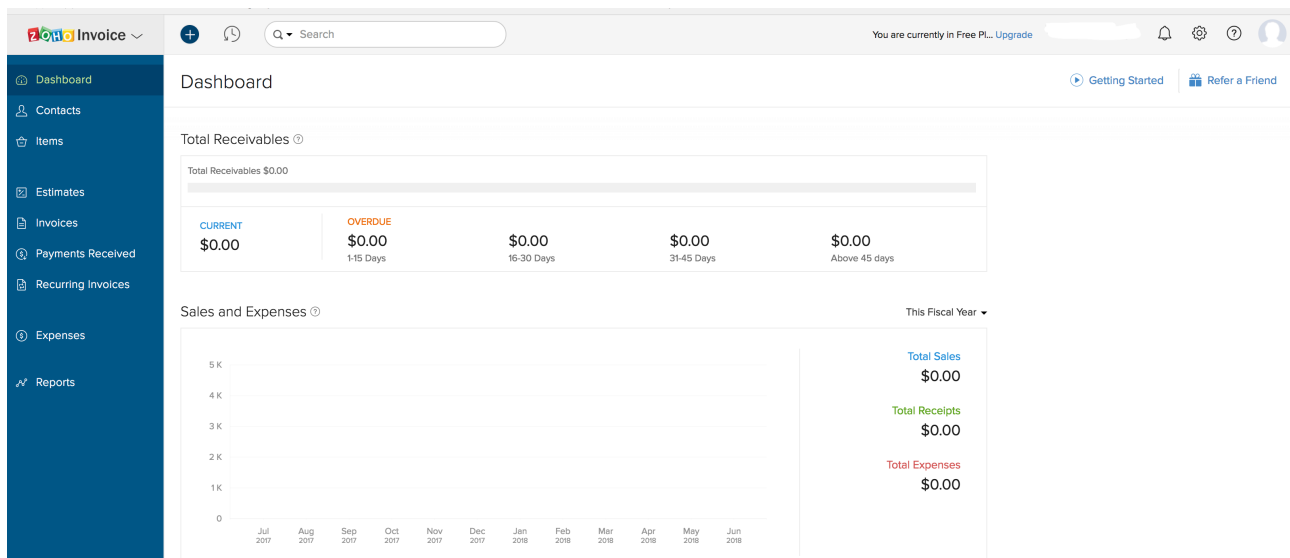
Tax ID: Tax ID :

Additional Fields: ABN

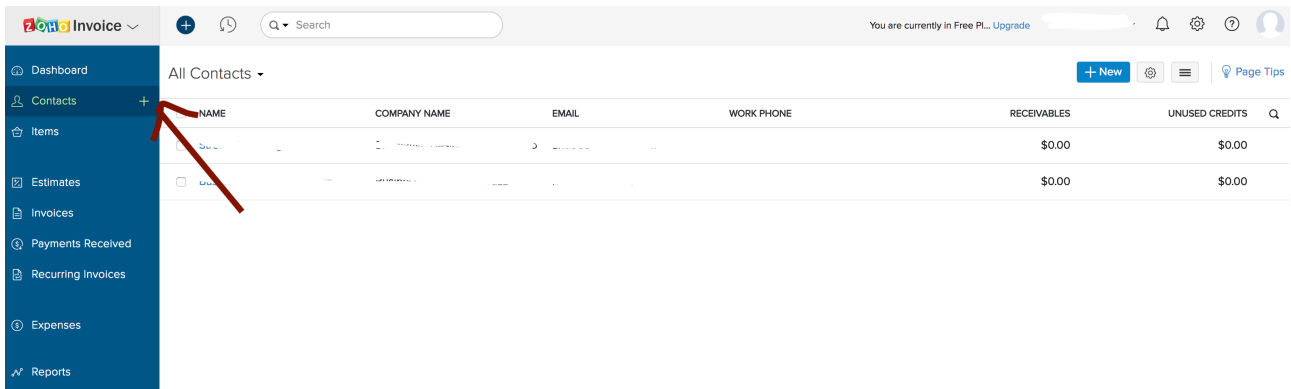
[Add additional field](#)

[Save](#) [Privacy Policy](#)

Enter your General Dashboard- See Dashboard on the LHS menu



Add your tenant as a contact. Click on Contacts on the LHS menu



Add all your tenants contact details in the fields.

The screenshot shows the 'New Contact' form in Zoho Invoice. The form has several fields: Primary Contact (Salutation, First Name, Last Name), Company Name, Contact Display Name (with a dropdown arrow), Contact Email, Contact Phone (Work Phone, Mobile, and an 'Add more fields' link), and Website. Below these fields are tabs: Other Details, Address, Contact Persons, Custom Fields, and Remarks. The 'Other Details' tab is selected. Under this tab, there are sections for 'Tax Preference' (Taxable and Tax Exempt radio buttons) and 'Tax Rate' (a dropdown menu with the text 'Select a Tax' and a note about creating a tax group in Settings).

When you've added all your different tenants for your properties in Zoho- they will be able to be found on the drop down menu

This screenshot shows the 'New Contact' form with the 'Contact Display Name' dropdown menu open. The dropdown list contains five options: 'Smiths Chips Company', 'Ms. Jane Smith', 'Jane Smith', 'Smith, Jane', and 'Smiths Chips Company'. A red arrow points to the 'Ms. Jane Smith' option. The 'Save' and 'Cancel' buttons are visible at the bottom of the form.

Use the contact display name to add the property name or location to help you distinguish tenants for properties.

Dashboard **Contacts** **Items** **Estimates** **Invoices** **Payments Received** **Recurring Invoices** **Expenses** **Reports**

New Contact

Primary Contact

Company Name

Contact Display Name

Contact Email

Contact Phone [Add more fields](#)

Website

Scroll down to other details

Zoho Invoice **Dashboard** **Contacts** **Items** **Estimates** **Invoices** **Payments Received** **Recurring Invoices** **Expenses** **Reports**

New Contact

Primary Contact

Company Name

Contact Display Name

Contact Email

Contact Phone

Skype Name/Number

Designation

Department

Website

Other Details **Address** **Contact Persons** **Custom Fields** **Remarks**

Set the tax parameters as required.

If you are registered for GST then you need to charge 10% GST and you must add this in under tax.

Zoho Invoice + 🕒

Contacts +

Other Details | Address | Contact Persons | Custom Fields | Remarks

Tax Preference ☒ Taxable ☐ Tax Exempt

Tax Rate Select a Tax ⌵

To associate more than one tax, you need to create a tax group in Settings.

Currency AUD- Australian Dollar ⌵

Payment Terms Due on Receipt ⌵

Enable Portal? ☐ Allow portal access for this contact

Portal Language English ⌵

Facebook f

Twitter t

Zoho Invoice + 🕒

Contacts +

Other Details | Address | Contact Persons | Custom Fields | Remarks

Tax Preference ☒ Taxable ☐ Tax Exempt

Tax Rate Select a Tax ⌵

Currency AUD- Australian Dollar ⌵

Payment Terms Due on Receipt ⌵

Enable Portal? ☐ Allow portal access for this contact

Portal Language English ⌵

Facebook f

Twitter t

Taxes

- GST [10%]**
- [+ New Tax](#)

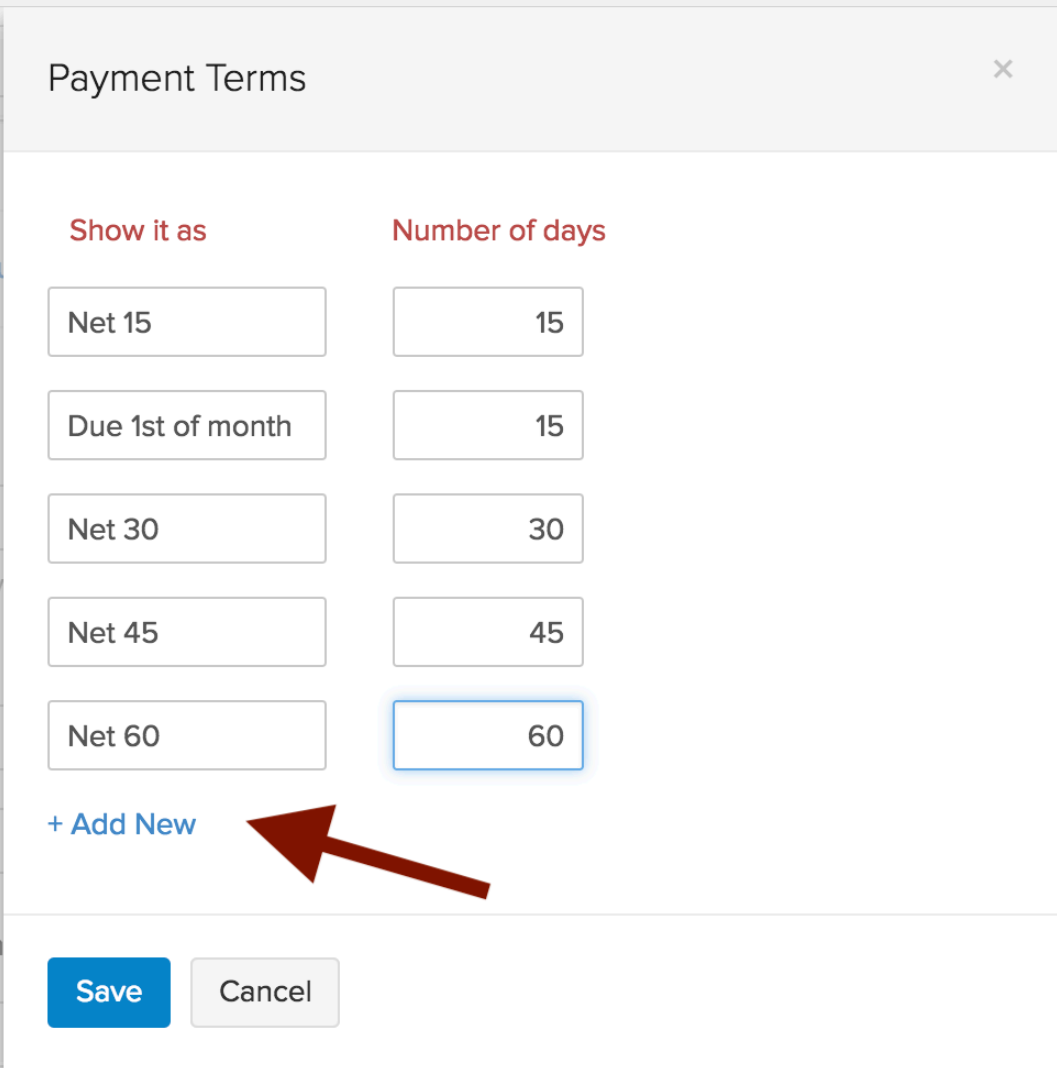
Create a "New Tax" - Name it GST or GST Australia - then add the rate at 10%

Set the payment terms. You can set this up so they are automatically recurring invoices- and can be due in a set time period, for example 2 weeks.

You can choose one of the pre-existing payment terms yourself- or use the “Configure Terms” gear at the bottom to set your own.

	Other Details	Address	Contact Persons	Custom Fields	Remarks
Tax Preference	<input checked="" type="radio"/> Taxable <input type="radio"/> Tax Exempt				
Tax Rate	<div>Australian GST [10%] ✕ ▼</div> <p>To associate more than one tax, you need to create a tax group in Settings.</p>				
Currency	<div>AUD- Australian Dollar ▼</div>				
Payment Terms	<div>Due on Receipt ^</div> <div><div></div><div>Net 15</div><div>Due 1st of month</div><div>Net 30</div><div>Net 45</div><div>Net 60</div><div>Due end of the month</div><div>Due end of next month</div><div>Due on Receipt</div><div>⚙️ Configure Terms</div></div>				
Enable Portal?					
Portal Language					
Facebook					
Twitter					

Click “Add New” to create your own payment terms.



The image shows a 'Payment Terms' dialog box with a close button (X) in the top right corner. It contains two columns: 'Show it as' and 'Number of days'. The 'Show it as' column has five text input fields containing 'Net 15', 'Due 1st of month', 'Net 30', 'Net 45', and 'Net 60'. The 'Number of days' column has five corresponding text input fields containing '15', '15', '30', '45', and '60'. The '60' in the last row is highlighted with a blue border. Below these columns is a '+ Add New' link. A large red arrow points from the '+ Add New' link towards the bottom right. At the bottom of the dialog are two buttons: 'Save' (blue) and 'Cancel' (gray).

Show it as	Number of days
Net 15	15
Due 1st of month	15
Net 30	30
Net 45	45
Net 60	60

[+ Add New](#)

Save Cancel

If for example, your payments are due at the end of the month, or beginning of the month, or the 28th of the month.... then write that in the description box and add the approximate number of days - BEFORE- the payment is due- so that the invoice can be sent ahead of time.

This is often 2 weeks notice to your tenants of their next invoice.

Payment Terms

Show it as	Number of days
Net 15	15
Due 1st of month	15
Net 30	30
Net 45	45
Net 60	60
Due End Of Month	15

+ Add New

Mark as Default

Save Cancel

Now you can select your new personalised payment terms, that you've created, from the drop down menu.

Contacts

+

Items

Estimates

Invoices

Payments Received

Recurring Invoices

Expenses

Reports

Other Details

Address

Contact Persons

Custom Fields

Remarks

Tax Preference

☒ Taxable ☐ Tax Exempt

Tax Rate

Australian GST [10%]

X

▼

To associate more than one tax, you need to create a tax group in Settings.

Currency

AUD- Australian Dollar

▼

Payment Terms

Due End Of Month

▼

Enable Portal?

☐ Allow portal access for this contact

Portal Language

English

▼

Facebook

f

http://www.facebook.com/

Twitter

t

http://www.twitter.com/

Back in Contacts- add their address details.

Dashboard

Contacts

+

Items

Estimates

Invoices

Payments Received

Recurring Invoices

Expenses

Reports

Other Details

Address

Contact Persons

Custom Fields

Remarks

BILLING ADDRESS

SHIPPING ADDRESS

Copy billing address

Attention

Jane Smith

Attention

Address

1 Smith Street

Address

Street 1

Street 2

Street 2

City

Chipville

City

State

Victoria

State

Zip Code

3333

Zip Code

Country

Australia

Country

Select or Type to add

Fax

Fax

Note: You can add and manage additional addresses from contact details section.

Any time you need to update or edit your tenant's details- go into their contact record and click "Edit"

The screenshot shows the Xero Invoice software interface. On the left is a navigation menu with options like Dashboard, Contacts, Items, Estimates, Invoices, Payments Received, Recurring Invoices, Expenses, and Reports. The main area displays the contact record for 'Smiths Chips Company'. At the top right of this panel, there is an 'Edit' button, which is highlighted by a red arrow. Other buttons include 'New Transaction' and 'More'. The contact details for Ms. Jane Smith are visible, including her email, phone number, and address. There are also financial summaries like 'UNUSED CREDITS' and 'OUTSTANDING RECEIVABLES'.

If you want to add your tenant's business ABN details- go into "Other Details" ... and where it says "Designation- you can add "ABN" and where it says "Department, you can add the actual ABN number, such as the example below.

The screenshot shows the 'Edit Contact Person' dialog box. It contains fields for Name (Ms. Jane Smith), Email (Jane@smithschipsco.co), Contact info (6107445556666666, Mobile), and Skype Name/Number. Under the 'Other Details' section, there are two fields: 'Designation' and 'Department'. Red arrows point to these fields, indicating where to enter the ABN number. Below these fields is a checkbox for 'Enable portal access' with a note: 'Your clients will be able to see all the transactions with your company through this portal by logging with their email id. [Learn more](#)'. At the bottom are 'Save' and 'Cancel' buttons.

Tenant's ABN placement example

Edit Contact Person

Name

Ms.

▼

Jane

Smith

Email

Jane@smithschipsco.co

Contact info

61074455566666

Mobile

S

 Skype Name/Number

Other Details

ABN

28765402654

☐ Enable portal access

Your clients will be able to see all the transactions with your company through this portal by logging with their email id. [Learn more](#)

Save

Cancel

Smiths Chips Company

Overview

Comments

Sales

Mails

State

Smiths Chips Company

Ms. Jane Smith

Jane@smithschipsco.co

ABN

28765402654

61074455566666

Edit

Send Email

Delete

ADDRESS

^

Setting up your First Invoice to your Tenant

There are 2 ways to set up and invoice for your tenants.

1. Under Your Tenant's Contact- Business name or individual name- go into "New Transaction"

This is where you can send them an invoice- click invoice and a new invoice will be created.

Smiths Chips Company

Overview Comments Sales Mails Statement

Ms. Jane Smith
Jane@smithschipsco.co
ABN
28765402654
6107445556666
[Edit](#) [Send Email](#) [Delete](#)

ADDRESS

Billing Address
Jane Smith
1 Smith Street
Chipville
Victoria 3333
Australia

UNUSED CREDITS
\$0.00

OUTSTANDING RECEIVABLES
\$0.00

Income and Expense

SALES
Invoice
Customer Payment
Estimate
Recurring Invoice
Credit Note
Expense
Recurring Expense

2. From your dashboard- on the LHS menu, select Invoices.

Then you can click "New Invoice" and from within the new invoice - you can use the drop down menu to select your "customer" which is your tenant.

Invoice

Dashboard Contacts Items Estimates Invoices Payments Received Recurring Invoices Expenses Reports

New Invoice

Customer Name Select Customer

Invoice# INV-000004

Order Number

Invoice Date 20/11/2017 Terms Due on Receipt Due Date 20/11/2017

Item Details	Quantity	Rate	Tax ①	Amount
Type or click to select an item.	1.00	0.00	Select a Tax	0.00

+ Add another line

Sub Total 0.00

Adjustment 0.00

Total (\$) 0.00

Select the correct tenant from the drop down menu.

Customer Name

Invoice#

Order Number

Invoice Date

Terms

Due on Receipt

Smiths Chips Company ←

+ New Customer

From here, you can set the date you wish the invoice to be sent.

Set the terms.

Set the due date.

New Invoice

Customer Name AUD

☒ Australian GST (10%)

BILLING ADDRESS [CHANGE](#) SHIPPING ADDRESS [Add new address](#)

Jane Smith
1 Smith Street
Chipville
Victoria 3333
Australia

Invoice# [Settings](#)

Order Number

Invoice Date Terms Due Date

Item Rates Are

Item Details	Quantity	Rate	Tax	Amount
--------------	----------	------	-----	--------

Under “Customer Notes” add a short message to your tenant.

Such as:

Thanks for your timely payment

Regards YOUR NAME

Under “Terms and Conditions”

Add the payment requirements.

Usually, you will have your tenants pay you directly into your bank account by Electronic Bank Transfer.... So this is where these instructions and details go.

Such as:

Payment is to be made by Electronic Bank Transfer or by direct payment to this account

Account Name: The NAME on your Bank account

BSB: The banks BSB number of your account

Account Number: your account number

Bank: The banking institution.

Item Rates Are Tax Exclusive

Item Details	Quantity	Rate	Tax	Amount
Type or click to select an item.	1.00	0.00	Australian GST [1... x v	0.00

+ Add another line

Sub Total 0.00

Adjustment 0.00

Total (\$) 0.00

Payment Options

Attach File(s) Upload File
 You can upload a maximum of 5 files, 5MB each

Template: 'Rent Payment Template'

Customer Notes

Thanks for your timely payment.
We wish you every success.

Will be displayed on the invoice

Terms & Conditions

Payment to be made by Electronic Bank Transfer into the following account:

Configuring the Rent for the invoice

In the Invoice- under “Item Details” click the text box and then click “Add New Item”

This will enable you to add a New Rental charge for a particular property

Invoice Date 20/11/2017 Terms Due End Of M... Due Date 05/12/2017

Item Rates Are Tax Exclusive

Item Details	Quantity	Rate	Tax	Amount
Type or click to select an item.	1.00	0.00	Australian GST [1... x v	0.00

Outgoings

Outgoings 2

Rental Payment Location A

+ Add New Item

Sub Total 0.00

Adjustment 0.00

Total (\$) 0.00

1. **For this Rental Item-** Choose “Product”

2. Then add the name for the rent- I suggest you name the rent for the specific property, using property location and type of property.

For example... Your property may be in a particular suburb of Brisbane such as “Albion”, so you would name that rent something like this...

Name: Net Rental Albion Shop, or Gross Rental Albion Office, or Net Rental Albion Warehouse

If you have a mixed tenancy property- use the name of the building if your building is named (eg. Axon House), the location and the property number in the rental name description.

For example... **Name:** Net Rental Axon House Albion Shop No. 12, or Gross Rental Axon House Albion Office No. 24

The screenshot shows a 'New Item' form with the following fields and annotations:

- Type:** Radio buttons for 'Product' (selected) and 'Service'. An arrow labeled '1. Choose Product' points to the 'Product' button.
- Name:** Text input field containing 'Net Rental Smiths Chips Co'. An arrow labeled '2. Name The expense' points to this field.
- Unit:** Dropdown menu with 'Rent' selected. An arrow labeled '3. Name the type' points to this dropdown.
- Tax Preference:** Radio buttons for 'Taxable' (selected) and 'Non-Taxable'.
- Rate:** Currency selector set to 'AUD' and a text input field containing '1500'. An arrow labeled '4. Add the Amount Excluding GST' points to the '1500' field.
- Description:** Text input field containing 'Net Rent Ex. GST'. An arrow labeled '5. Add a description' points to this field.

At the bottom of the form are 'Save' and 'Cancel' buttons.

3. Under “Unit” name it “Rent”

Click the appropriate Tax Preference box. Remembering if you are registered for GST- this will need to be ticked as taxable.

4. Choose the Rate as AUD- AUD would be set in your currency preferences for your profile.

Add the rental amount in the “Rate box”

5. Add a description to the box.

If you are adding GST, then you need to specify that this Rent box is “Net rent excluding GST” Because the GST is calculated separately and added separately by the zoho invoicing software.

This is how Zoho invoice will calculate and add the GST to your invoice

Victoria 3333
Australia

Invoice# INV-000004

Order Number

Invoice Date 20/11/2017

Terms Due End Of M... Due Date 05/12/2017

Item Rates Are Tax Exclusive

Item Details	Quantity	Rate	Tax	Amount
Net Rental Smiths Chips Co	1.00	1500	Australian GST [1... X v	1500.00
Net Rent Ex. GST	Rent			

+ Add another line

Sub Total 1500.00

Australian GST [10%] 150.00

Adjustment 0.00

GST automatically applied

Configuring the Outgoings for your Invoices

Configuring Additional Outgoing expense for tenant invoices

The outgoings are covered depending on your lease document.

1. Perhaps your tenant pays a gross monthly amount which includes your outgoings expenses- but which they do not pay for separately- in this instance you will only need to send an invoice with their Gross monthly rental payment
2. If your tenants pay a net rental and in addition they pay the outgoings separately as they are incurred- Then you will need to set up a separate invoice when these outgoing are incurred and send them a separate invoice.
3. If your tenant pays a monthly set contribution towards the outgoings expenses, then you will need to add the outgoings to each invoice.

For scenario 3 To add outgoings to the monthly invoice - under "Item Details"- click to add "New Item"

Invoices +

Payments Received

Recurring Invoices

Expenses

Reports

Invoice Date 20/11/2017

Terms Due End Of M... Due Date 05/12/2017

Item Rates Are Tax Exclusive

Item Details	Quantity	Rate	Tax	Amount
[Type or click to select an item.]	1.00	0.00	Australian GST [1... X v	0.00
Outgoings				
Outgoings 2				0.00
Rental Payment Location A				

+ Add New Item

Adjustment 0.00

Total (\$) 0.00

As a New Item, the “Type” should be “Product”

New Item

Type ☒ Product ☐ Service

Name Outgoings Smiths Chips Co

Unit [?] Owners Corp Fees Smiths Chips

Tax Preference ☒ Taxable ☐ Non-Taxable

Rate AUD 500

Description ex GST

Save Cancel

Name: the Outgoings- as per the property name

Under “Unit” use this to name and describe the type of outgoing this is.
For example it may be “Owners Corporate Fees for Albion Shop”

Select Tax Preference, based on whether you are registered for GST and apply “Taxable” if you are applying GST

Under “Rate- place the \$ amount of the outgoing expense.

IN the description box, write Excluding GST .. or Ex GST, because Zoho will apply the tax automatically and separately.

Example of a Council Rates outgoings in Invoice

New Item

Type

☒ Product ☐ Service

Name

Rates Smiths Chips Co

Unit ?

Rates Smiths Chips Co

Tax Preference

☒ Taxable ☐ Non-Taxable

Rate

AUD 300

Description

Council and water rates

Save

Cancel

How Zoho displays the Invoice with Outgoings included separately.

GST is calculated and applied on the “Items” you have specified are Taxable.

In this example each item has GST applied. And the description boxes give you and your tenant more information on what type of expenses or outgoing it is.

zohoinvoice

Dashboard

Contacts

Items

Estimates

Invoices

Payments Received

Recurring Invoices

Expenses

Reports

Item Rates Are

Tax Exclusive

Search

You are currently in Free Plan. Upgrade

Item Details	Quantity	Rate	Tax	Amount
Net Rental Smiths Chips Co	1.00	1500	Australian GST [1... x v	1500.00
Net Rent Ex. GST	Rent			
Outgoings Smiths Chips Co	1.00	500	Australian GST [1... x v	500.00
ex GST	Owners Corp Fees Smiths Chips			
Rates Smiths Chips Co	1.00	300	Australian GST [1... x v	300.00
Council and water rates	Rates Smiths Chips Co			

+ Add another line

Sub Total2300.00

Australian GST [10%]230.00

GST Automatically updated

Adjustment0.00

Total (\$)2530.00

For Your Invoice Settings:

Make sure you have the “Email To” field filled with the email of your tenant. You can also add yourself as a constant for email copies to be sent to you.

Under “Template” you can sever this invoice layout if you want to- and then label and select it as a “Rent Payment Template”

Invoice

Search

You are currently in Free Pl... Upgrade

Dashboard

Contacts

Items

Estimates

Invoices

Payments Received

Recurring Invoices

Expenses

Reports

Payment Options

Attach File(s)

Template: 'Rent Payment Template'

Email To

+ Add New

Additional Fields: Start adding custom fields for your invoices by going to Settings ➡ Preferences ➡ Invoices. You can add as many as Ten extra fields.

Customer Notes

Terms & Conditions

You can choose a template layout for your Invoices.

Choose a template

Z

Zylkar Inc

4141 Hacienda Drive

Pharmacia

CA USA 94588

94588

Invoice# INV-17

Balance Due

Ru.662.75

Invoice Date: 15 Feb 2016

Terms: Due On Receipt

Due Date: 15 Feb 2016

P.O.#: 321014

Project Name: Design project

#	Item & Description	Qty	Rate	Discount	Amount
1	Brochure Design Brochure Design Single Sided Color	1.00	300.00	0.00	300.00
2	Web Design Package(Templates) - Basic Custom Templates for your business, includes of 10 hours of marketing and annual training	1.00	250.00	0.00	250.00
3	Print Ad - Basic - Color Print Ad 1/8 size Color	1.00	80.00	0.00	80.00
Sub Total					630.00
Sample Tax1 (4.70%)					11.75
Sample Tax2 (7.00%)					21.00
Total					Ru.662.75
Balance Due					Ru.662.75

Notes

Thanks for your business.

Payment Options

Terms & Conditions

OK

Cancel

Rent Payment Template

Invoice Layout- Zoho creates these layouts for you

The balance due is at the top RHS

The bill to: is to your Tenant's Business name and their address

The terms and due date are on the top LHS

The Items and description run in the middle.

The screenshot shows the Zoho Invoice dashboard. On the left is a navigation menu with options: Dashboard, Contacts, Items, Estimates, Invoices (selected), Payments Received, Recurring Invoices, Expenses, and Reports. The main area displays a list of invoices under 'All Invoices'. One invoice is shown: Smiths Chips Company, INV-000004, dated 20/11/2017, with a balance of \$2,530.00 and status 'DRAFT'. To the right, a preview of the invoice is shown. It is a 'Tax Invoice' for 'Pty Ltd' with invoice number 'INV-000004'. The 'Balance Due' is '\$2,530.00'. The 'Bill To' information is for Smiths Chips Company at 1 Smith Street, Chipville, 3333 Victoria, Australia. The 'Invoice Date' is 20/11/2017, 'Terms' are 'Due End Of Month', and 'Due Date' is 05/12/2017. The invoice items are:

#	Item & Description	Qty	Rate	Amount
1	Net Rental Smiths Chips Co Net Rent Ex. GST	1.00 Rent	1,500.00	1,500.00
2	Outgoings Smiths Chips Co ex GST	1.00 Owners Corp Fees Smiths Chips	500.00	500.00

GST is applied to the Sub Total at the end. And finally the Total is applied.

This block shows a detailed view of the invoice layout. At the top, the invoice number 'INV-000004' is displayed. Below it, the 'Bill To' information is for Smiths Chips Company at 1 Smith Street, Chipville, 3333 Victoria, Australia. The 'Invoice Date' is 20/11/2017, 'Terms' are 'Due End Of Month', and 'Due Date' is 05/12/2017. The invoice items are:

#	Item & Description	Qty	Rate	Amount
1	Net Rental Smiths Chips Co Net Rent Ex. GST	1.00 Rent	1,500.00	1,500.00
2	Outgoings Smiths Chips Co ex GST	1.00 Owners Corp Fees Smiths Chips	500.00	500.00
3	Rates Smiths Chips Co Council and water rates	1.00 Rates Smiths Chips Co	300.00	300.00

The summary section shows the following totals:

	Amount
Sub Total	2,300.00
Australian GST (10%)	230.00
Total	\$2,530.00
Balance Due	\$2,530.00

At the bottom, there is a 'Notes' section.

Below the Total and Balance, are the Notes and the Payment Terms and Conditions on the LHS

INV-000004

Chips Co

Sub Total	2,300.00
Australian GST (10%)	230.00
Total	\$2,530.00
Balance Due	\$2,530.00

Notes

Thanks for your timely payment.
We wish you every success.

Terms & Conditions

Payment to be made by Electronic Bank Transfer into the following account:

Pty Ltd
National Australia Bank
BSB:
Acct No:

Template : 'Rent Payment Template' [Change](#)

To Email this invoice manually to your tenant...

Click on the Email Picture Icon on the top RHS corner

Invoice

Dashboard Contacts Items Estimates Invoices Payments Received Recurring Invoices Expenses Reports

All Invoices [+ New](#)

Smiths Chips Company INV-000004 20/11/2017 \$2,530.00 DRAFT

INV-000004

Chips Co

Sub Total	2,300.00
Australian GST (10%)	230.00
Total	\$2,530.00
Balance Due	\$2,530.00

Notes

Thanks for your timely payment.
We wish you every success.

Terms & Conditions

Payment to be made by Electronic Bank Transfer into the following account:

Click to send Invoice to Tenant via email

Record Payment More

- Share Invoice Link
- Mark as Sent
- Make Recurring
- Create Credit Note
- Clone
- Void
- Print Delivery Note
- Print Packing Slip
- Delete

When you click on “More” ... you can share the invoice link, make it a recurring invoice, clone it, delete it etc.

To Email the invoice to your Tenant:

Click the email icon.

Make sure the correct tenant and email has been selected.

This is how it will appear...

The screenshot shows the Zoho Invoice interface for sending an email. The left sidebar contains navigation links: Dashboard, Contacts, Items, Estimates, Invoices (highlighted), Payments Received, Recurring Invoices, Expenses, and Reports. The top header includes the Zoho Invoice logo, a search bar, and user information: 'You are currently in Free PL... Upgrade' and 'Pty Ltd'. The main form is titled 'Email To Smiths Chips Company'. It has fields for 'From' (set to @gmail.com), 'Send To' (Jane Smith <Jane@smithschipsco.co>), 'Cc' (a placeholder email), and 'Subject' (Invoice - INV-000004 from Panom Pty Ltd). Below these fields is a rich text editor with a toolbar. The email body content is as follows:

Invoice #INV-000004

Dear Smiths Chips Company,

Thank you for your business. Your invoice can be viewed, printed and downloaded as PDF from the link below. Please pay by Electronic Bank Transfer.

INVOICE AMOUNT

Make sure at the bottom- that the box is checked for “ Attach Invoice as PDF”

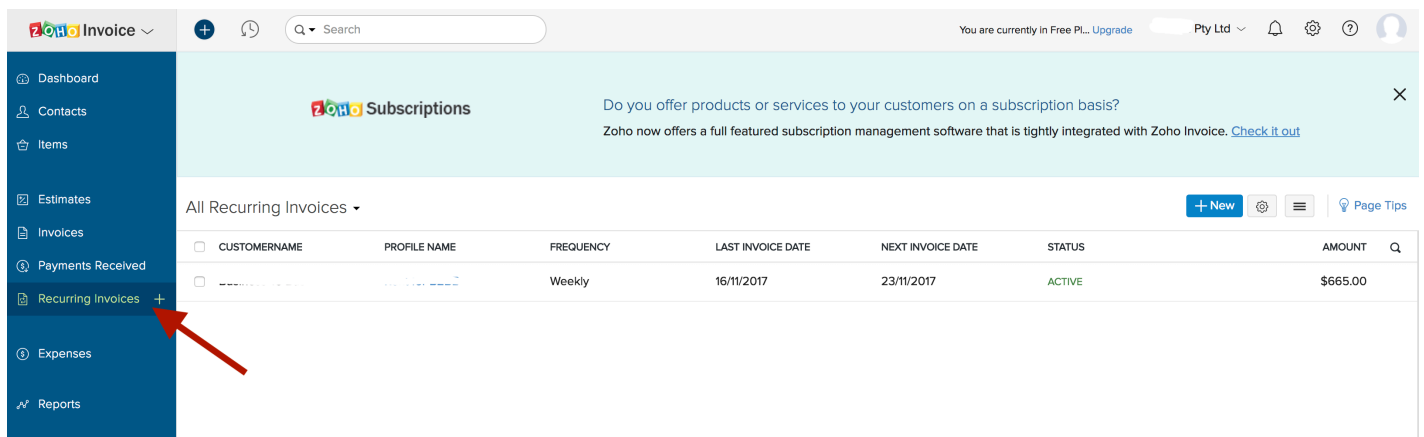
This screenshot shows the same Zoho Invoice interface, but with the 'Attach Invoice PDF' option selected. The email body content is identical to the previous screenshot. At the bottom of the form, there are two checkboxes: 'Attach Customer Statement' (unchecked) and 'Attach Invoice PDF' (checked). Next to the 'Attach Invoice PDF' checkbox is a small icon of a document with the text 'INV-000004'. Below these checkboxes is a link 'Attach File(s)'. At the very bottom, there are 'Send' and 'Cancel' buttons.

Recurring Invoices- Automated rental payments

Setting up a recurring invoice means you can send invoices to your tenants automatically each month.

You can set up an entire years worth of invoices- then you can update them- or set up a new recurring invoice when the errant goes up of any factors change.

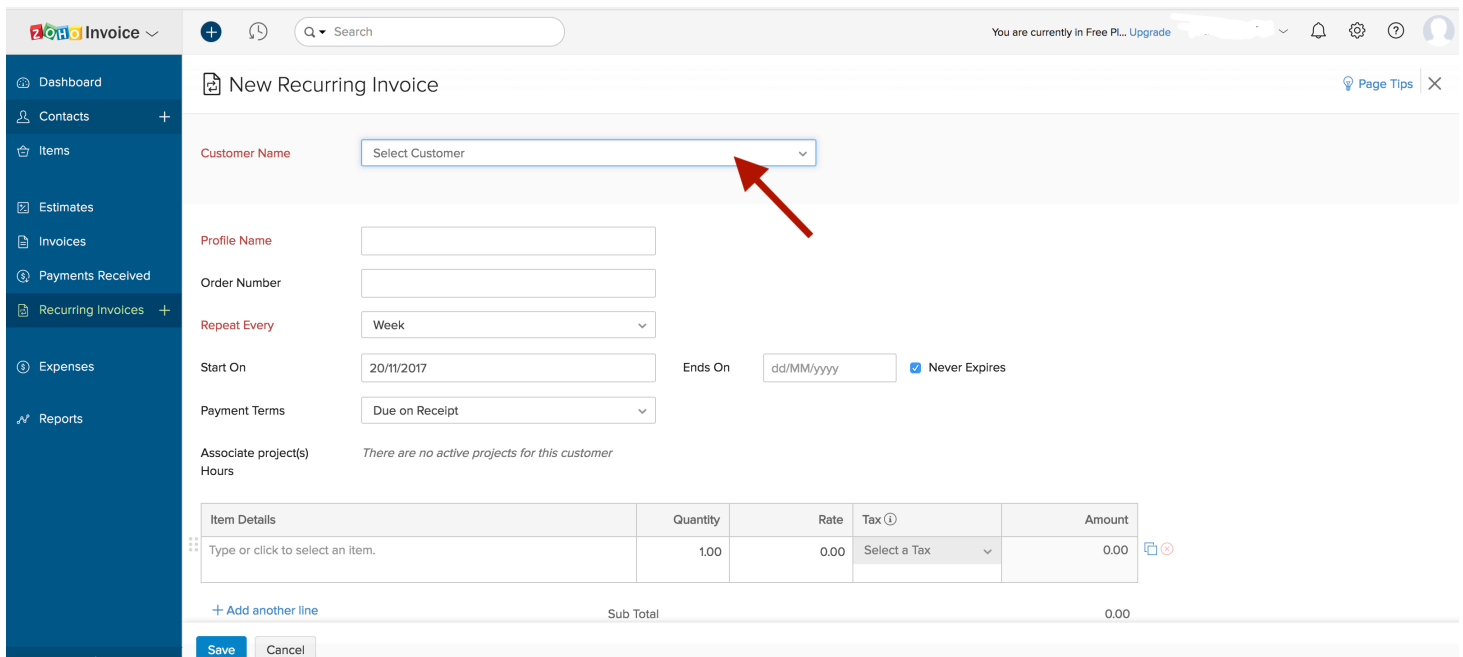
You can make an existing Invoice a recurring one.
Or you can create a recurring invoice from scratch.
On the LHS menu- select "Recurring Invoices"



The screenshot shows the Zoho Invoice dashboard. On the left sidebar, the 'Recurring Invoices' menu item is highlighted with a red arrow. The main content area displays a table of recurring invoices. The table has columns for CUSTOMERNAME, PROFILE NAME, FREQUENCY, LAST INVOICE DATE, NEXT INVOICE DATE, STATUS, and AMOUNT. A single row is visible with a frequency of 'Weekly', a last invoice date of '16/11/2017', a next invoice date of '23/11/2017', and a status of 'ACTIVE'. The amount is '\$665.00'.

CUSTOMERNAME	PROFILE NAME	FREQUENCY	LAST INVOICE DATE	NEXT INVOICE DATE	STATUS	AMOUNT
		Weekly	16/11/2017	23/11/2017	ACTIVE	\$665.00

Select the Tenant from the customer list



The screenshot shows the 'New Recurring Invoice' form in Zoho Invoice. A red arrow points to the 'Customer Name' dropdown menu, which is currently set to 'Select Customer'. Below this, there are fields for 'Profile Name', 'Order Number', 'Repeat Every' (set to 'Week'), 'Start On' (20/11/2017), 'Ends On' (dd/MM/yyyy), and 'Payment Terms' (Due on Receipt). There is also a checkbox for 'Never Expires'. At the bottom, there is a table for 'Item Details' with columns for Item Details, Quantity, Rate, Tax, and Amount. The table has one row with 'Type or click to select an item.', '1.00', '0.00', 'Select a Tax', and '0.00'. The 'Sub Total' is '0.00'. There are 'Save' and 'Cancel' buttons at the bottom left.

Item Details	Quantity	Rate	Tax	Amount
Type or click to select an item.	1.00	0.00	Select a Tax	0.00

In the box “Repeat Every...” select “monthly” form the drop down menu.

Select your state date (make this at least 2 weeks before the first / next invoice is due, to give your tenant plenty of advance warning.

In the “Ends On” date box, you can set to never expires- however I don’t recommend this - It should be set to expire at the end of the 12 months, so that your rent can be adjusted as per what’s specified in your lease.

Perhaps your lease has a 3% annual increase in net rent that w]you will need to apply for the next 12 months of rent- so you will need to set up a NEW recurring invoice for the next year.

Dashboard
Contacts
Items
Estimates
Invoices
Payments Received
Recurring Invoices
Expenses
Reports

New Recurring Invoice

Customer Name: Smiths Chips Company (AUD)
Australian GST (10%)

Billing Address: Jane Smith, 1 Smith Street, Chipville, Victoria 3333, Australia
SHIPPING ADDRESS: Add new address

Profile Name:
Order Number:
Repeat Every: Week
Start On: 20/11/2017
Ends On: dd/MM/yyyy
Payment Terms: Due End Of Month
Associate project(s): There are no active projects for this customer
Hours:

☒ Never Expires

Go into the future date of when your lease ends- and select a date before the new rental is required to end this recurring set of invoices.

Estimates
Invoices
Payments Received
Recurring Invoices
Expenses
Reports

Profile Name: Smiths Chips Co
Order Number:
Repeat Every: Month
Start On: 20/11/2017
Ends On: 30/11/2018
Payment Terms: Due End Of Month
Associate project(s): There are no active projects for this customer
Hours:

Item Rates Are: Tax Exclusive

Item Details	Quantity
Type or click to select an item.	1.00

Calendar overlay: November 2018. The date 30 is highlighted.

Select the frequency you want the invoices to be sent- under most circumstances this will be MONTHLY- so select Repeat Every Month

Chipville
Victoria 3333
Australia

Profile Name: Smiths Chips Co

Order Number:

Repeat Every: Month

Start On:

Payment Terms:

Associate project(s):

Hours:

Item Rates Are: Tax Exclusive

Item Details:

Quantity:

OPTIONS for Recurring Invoices

You can create Invoices as Drafts- so you can pre-check then approve manually.
I suggest you set your first one up this way- then later change to the 2nd option "Create and Send Invoices"

Recurring Invoices

Recurring invoices are automatically created based on a configured schedule. Here you can configure the auto-charging option and the process of sending these invoices to your customers.

☒ Create Invoices as drafts
Invoices are saved as drafts. You can review and send them to your customers for payment.

☐ Create and Send Invoices
Invoices are directly sent to your customers for payment.

☐ Create, Charge and Send Invoices
Your customer's credit card associated with the recurring invoice is charged automatically and invoices are sent for their reference.

Save Cancel

Use the 2nd option **“Create and Send Invoices”** - this will allow Zoho to automatically send them each month, after you have set up the correct invoice- you will not manually need to approve if you use this setting.

Recurring Invoices

Recurring invoices are automatically created based on a configured schedule. Here you can configure the auto-charging option and the process of sending these invoices to your customers.

- ☒ **Create Invoices as drafts**
Invoices are saved as drafts. You can review and send them to your customers for payment.
- ☐ **Create and Send Invoices**
Invoices are directly sent to your customers for payment.
- ☐ **Create, Charge and Send Invoices**
Your customer's credit card associated with the recurring invoice is charged automatically and invoices are sent for their reference.

[Save](#) [Cancel](#)

The recurring Invoice will show you the Next Invoice Date and the Recurring Period.

Your first recurring invoice may still be in Draft Mode... so make sure to make the change when you are finished with it.

Invoice

Dashboard Contacts Items Estimates Invoices Payments Received Recurring Invoices Expenses Reports

All Recurring Invoices [+ New](#)

- ☐ **Smiths Chips Co** \$2,200.00 Monthly ACTIVE
Next Invoice on 20/12/2017
- ☐ **Rent for .** \$665.00 Weekly ACTIVE
Next Invoice on 23/11/2017

Smiths Chips Co

Overview Next Invoice Recent Activities

Smiths Chips Company

Smiths Chips Company
Jane@smithschipsco.co
61074455566666

DETAILS

Start Date: 20/11/2017
End Date: 30/11/2018
Remaining billing cycle: 12
Payment Terms: Due End Of Month
Manually Created Invoices: 1

ADDRESS

Billing Address
Jane Smith
1 Smith Street
Chipville
Victoria 3333
Australia

Shipping Address

Invoice Amount \$2,200.00 Next Invoice Date 20/12/2017 Recurring Period Monthly

All Child Invoices Unpaid Invoices : \$0.00

Smiths Chips Company
INV-000005 | 20/11/2017
Manually Added

This one is Still in Draft Mode

\$2,200.00 DRAFT
[Record Payment](#)


Email To Smiths Chips Company

Invoice #INV-000005

Dear Smiths Chips Company,

Thank you for your business. Your invoice can be viewed, printed and downloaded as PDF from the link below. Please pay by Electronic Bank Transfer.

INVOICE AMOUNT
\$2,200.00

☐ Attach Customer Statement.
☒ Attach Invoice PDF  INV-000005

Attach File(s)

Send

Cancel

You can Clone invoices when it's time to update them after 12 months and increase the rent.
Under "More"... select "Clone"

zohob Invoice

+ ↻ 🔍 Search

You are currently in Free Pl... Upgrade Pty Ltd 🔔 ⚙️ ? 🗣️

Dashboard

Contacts

Items

Estimates

Invoices

All Recurring Invoices

+ New

☰

<input type="checkbox"/>	Smiths Chips Co Smiths Chips Company Next Invoice on 20/12/2017	\$2,200.00 Monthly ACTIVE
<input type="checkbox"/>	Rent for ... Next Invoice on 23/11/2017	\$665.00 Weekly ACTIVE

Smiths Chips Co

Overview

Next Invoice

Recent Activities

Create Invoice

More

Stop

Clone

Delete

You can manually stop recurring invoices if you need to

zohob Invoice

+ ↻ 🔍 Search

Dashboard

Contacts

Items

All Recurring Invoices

+ New

☰

<input type="checkbox"/>	Smiths Chips Co Smiths Chips Company Next Invoice on 20/12/2017	\$2,200.00 Monthly STOPPED
--------------------------	--	---

Invoice Sent by your name

The screenshot shows the Zoho Invoice dashboard. On the left is a sidebar with navigation links: Dashboard, Contacts, Items, Estimates, Invoices (selected), Payments Received, Recurring Invoices, Expenses, and Reports. The main area displays a list of invoices under the 'All Invoices' filter. Two invoices are listed for 'Smiths Chips Company': INV-000005 for \$2,200.00 (DRAFT) and INV-000004 for \$2,530.00 (DUE IN 15 DAYS). The invoice INV-000004 is selected, showing its details and a preview. The preview shows a 'Tax Invoice' from 'Pty Ltd' to 'Smiths Chips Company' for \$2,530.00. A red arrow points to the 'Invoice emailed to' field in the details, which shows an email address. Another red arrow points to the 'Invoice sent by YOUR NAME' text in the details, with a sub-note 'Track if it's been emailed to tenant'.

Invoice - INV-000004 from Pty Ltd

Invoice created for \$2,530.00 by ...

Invoice emailed to @gmail.com by ...

Invoice sent by YOUR NAME
Track if it's been emailed to tenant

Tax Invoice
INV-000004
Balance Due
\$2,530.00

Invoice Date : 20/11/2017
Terms : Due End Of Month
Due Date : 05/12/2017

#	Item & Description	Qty	Rate	Amount
1	Net Rental Smiths Chips Co Net Rent Ex. GST	1.00 Rent	1,500.00	1,500.00

The screenshot shows an email inbox. The selected email is from 'Pty Ltd <message-service@sender.zohoinvoice.com>' to 'me, '. The email subject is 'Invoice - INV-000004 from Pty Ltd'. The email body contains the following text: 'Dear Smiths Chips Company, Thank you for your business. Your invoice can be viewed, printed and downloaded as PDF from the link below. Please pay by Electronic Bank Transfer.' Below the text is a green box with the following information: 'INVOICE AMOUNT \$2,530.00', 'Invoice No INV-000004', 'Invoice Date 20/11/2017', 'Due Date 05/12/2017', and a 'VIEW INVOICE' button. A red arrow points to the 'Pty Ltd' in the email header.

Invoice - INV-000004 from Pty Ltd

Dear Smiths Chips Company,

Thank you for your business. Your invoice can be viewed, printed and downloaded as PDF from the link below. Please pay by Electronic Bank Transfer.

INVOICE AMOUNT
\$2,530.00

Invoice No **INV-000004**
Invoice Date **20/11/2017**
Due Date **05/12/2017**

VIEW INVOICE

Example Invoice

Pty Ltd

Melbourne Victoria 3163
Australia
ABN

Tax Invoice

INV-000004

Balance Due
\$2,530.00

Bill To
Smiths Chips Company
1 Smith Street
Chipville
3333 Victoria
Australia

Invoice Date : 20/11/2017
Terms : Due End Of Month
Due Date : 05/12/2017

#	Item & Description	Qty	Rate	Amount
1	Net Rental Smiths Chips Co Net Rent Ex. GST	1.00 Rent	1,500.00	1,500.00
2	Outgoings Smiths Chips Co ex GST	1.00 Owners Corp Fees Smiths Chips	500.00	500.00
3	Rates Smiths Chips Co Council and water rates	1.00 Rates Smiths Chips Co	300.00	300.00
Sub Total				2,300.00
Australian GST (10%)				230.00
Total				\$2,530.00
Balance Due				\$2,530.00

Notes

Thanks for your timely payment.
We wish you every success.

Terms & Conditions

Payment to be made by Electronic Bank Transfer into the following account:

Pty Ltd
National Australia Bank
BSB:
Acct No:

Options Under the MORE tab

The screenshot shows an invoice interface. At the top, there is a toolbar with icons for editing, downloading, printing, emailing, and attaching. To the right of these icons are two buttons: 'Record Payment' (in blue) and 'More' (with a dropdown arrow). A close button (X) is also visible. Below the toolbar, the invoice details are partially visible, showing 'Sub Total', 'Australian GST (10%)', 'Total', and 'Balance Due' (highlighted in a light pink box). The 'More' dropdown menu is open, displaying the following options: 'Share Invoice Link', 'Send Reminder', 'Expected Payment Date', 'Make Recurring', 'Create Credit Note', 'Clone', 'Write Off', 'Void', 'Print Delivery Note', 'Print Packing Slip', and 'Delete'.

Sub Total

Australian GST (10%)

Total

Balance Due

Record Payment

More ▾

Share Invoice Link

Send Reminder

Expected Payment Date

Make Recurring

Create Credit Note

Clone

Write Off

Void

Print Delivery Note

Print Packing Slip

Delete

Deleting Invoices.

The screenshot shows a confirmation dialog box. It has a yellow warning icon (an exclamation mark inside a circle) on the left. The text inside the dialog reads: 'Invoice will be deleted and cannot be retrieved later. Are you sure about deleting it?'. At the bottom of the dialog, there are two buttons: 'Delete it' (in blue) and 'Cancel' (in grey). The background shows a blurred view of the invoice interface, including a 'DRAFT' status and some numerical values like '00.0' and '30.00'.

Invoice will be deleted and cannot be retrieved later. Are you sure about deleting it?

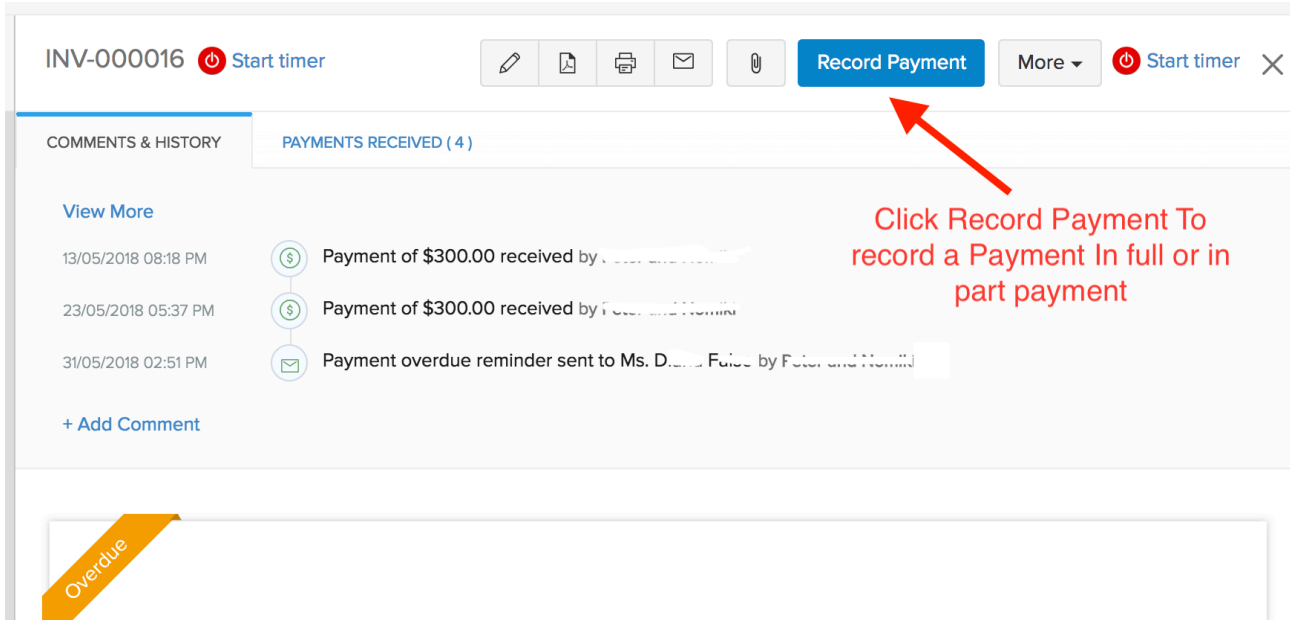
Delete it

Cancel

Recording Payments for an Invoice

You can add Full and Partial payments to your invoices.

When your tenant pays each month- go into the Invoice you generated and select “Record Payment” at the top of the invoice.



You can add the amount they have paid you.

If they have paid in full- add the full amount in “Amount Received” - *see image below*

If they have paid a part payment by instalment- then you can also record a part payment- Zoho will deduct that payment for that invoice and you can re-send another email with the adjusted balance on the invoice- so they can pay the remainder.

If this is a part payment- make sure you add a description in the “Notes” she you can record the details.

For example add to the NOTES.....

Part payment of \$300 for April Rent of 2018 on Albion Shop

Payment for INV-000016

Customer Name*

Ms. Diana T...

Amount Received(AUD)*

1. Add Amount

Bank Charges (if any)

Payment Date*

31/05/2018

Payment Mode

Bank Transfer

2. Select Payment Method

Deposit To*

Petty Cash

3. Set the "Deposit To" to your Bank Account Name

Reference#

Notes

4. If it's a part payment- then add this as a description in the notes

Attach File(s)



Upload File ▾

You can upload a maximum of 5 files, 5MB each

5. Send Email to Tenant for Part Payment

☒ Send a "thank you" note for this payment

☒ dia...@gmail.com

☐ p...


Record Payment






Cancel



Start timer


Part Payments are recorded in your Zoho invoice activity for each invoice


INV-000016  Start timer


     **Record Payment** More ▾

COMMENTS & HISTORY **PAYMENTS RECEIVED (4)**

[View More](#)

13/05/2018 08:18 PM  Payment of \$300.00 received by P. ... and ...

23/05/2018 05:37 PM  Payment of \$300.00 received by P. ... and ...

31/05/2018 02:51 PM  Payment overdue reminder sent to Ms. Dia.niki

[Add Comment](#)

Part Payments are recorded in your Zoho Invoice activity for each Invoice

The remaining Balance is then adjusted automatically, once you have manually recorded the part payments.

	Qty	Rate	Amount
	1.00	1,863.33	1,863.33
	Rent		
Sub Total			1,863.33
GST (10%)			186.33
Total			\$2,049.66
Payment Made			(-) 1,200.00
Balance Due			\$849.66

1. Total of Part Payments made

2. New Adjusted Balance due