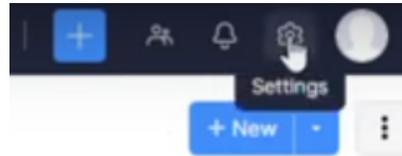


How to Send & Print Invoices from Zoho

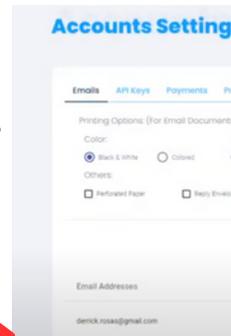
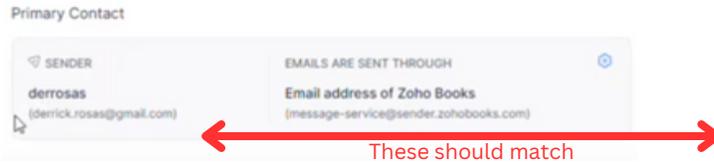
First you will want to **Login to the Zoho Books Portal**
Click on Settings gear on top right of page



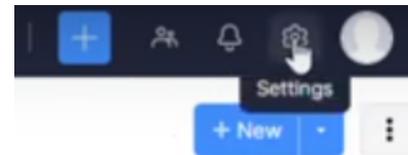
Now **Click on Profile**



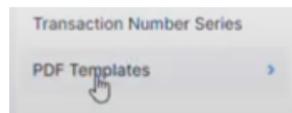
Confirm that the Sender email address is
the same as the email address in Postal Methods



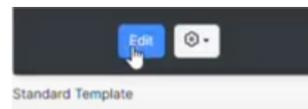
Now **Go back to Setting gear** at top right of page



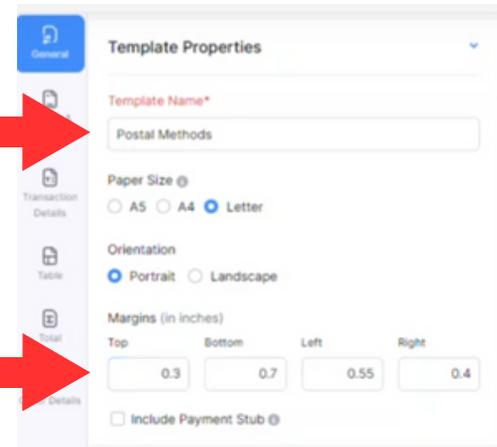
Now **Click on PDF Templates**



Now **Hover over Standard Template & Click on Edit**



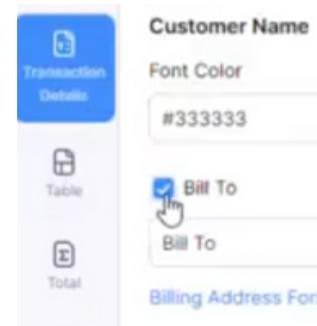
Now **name your Template: Postal Methods**



Make sure the **Top Margin is changed to 0.3** and
Click on Save on the top right corner

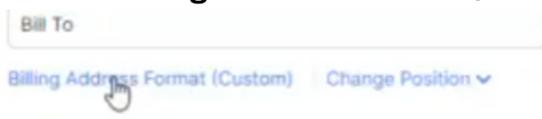


Now **go back to Edit** and then **Select Transaction Details**



Checkmark the box next to: Bill To

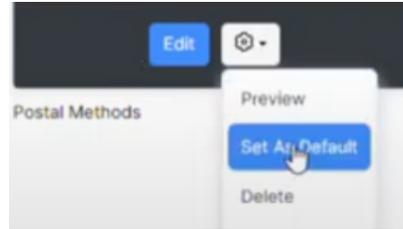
Now **Click on Billing Address Format (Custom)**



Make sure the **Placeholders** look like this:

```
Insert Placeholders ▾  
$(CONTACT.CONTACT_DISPLAYNAME)  
$(CONTACT.CONTACT_ADDRESS)  
$(CONTACT.CONTACT_CITY), $(CONTACT.CONTACT_STATE) $(CONTACT.CONTACT_CODE)
```

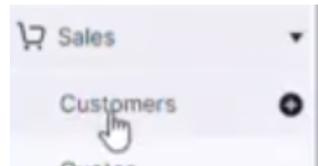
Now **Hover over new Template** and **Click on Gear Icon and Select Set As Default**



Now **Click on Close Settings** at the top Right Corner



Now **Hover over Sales** and **Click on Customers**



Select a Customer, then Click on Edit



Towards the middle of page **Click on Contact Persons**

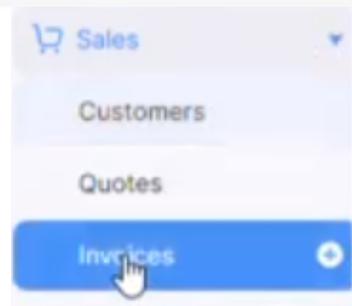


Add Contact Person (Name does not matter) **Add the following Email:** send@secure.postalmethods.com

Note: To automatically send a paper invoice to ALL your customers, see instructions at the end.

SALUTATION	FIRST NAME	LAST NAME	EMAIL ADDRESS
▼	Postal	Methods	send@secure.post

Add Contact Person



Now **Hover over Sales** and **Click on Invoices**



Now **Click on New Invoice**

Import Invoices

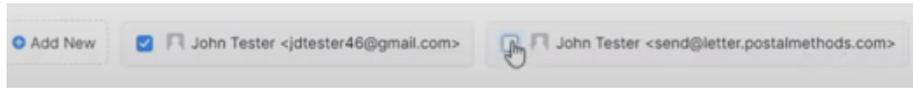
Select one of your customers

Then fill out your invoice as needed



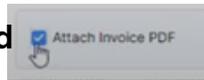
The screenshot shows a dropdown menu for 'Customer Name*'. The search bar contains 'Select or add a customer'. Below the search bar, a search input field is visible. A list of customer suggestions is shown, with 'John Tester' selected and highlighted. A mouse cursor is pointing at the 'John Tester' entry.

Make sure you **Checkmark the box by the new user you added** then **select Save and Send**



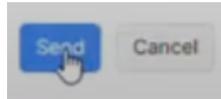
The screenshot shows two customer entries in a list. The first entry is 'John Tester <jdtester46@gmail.com>' with a checked checkbox. The second entry is 'John Tester <send@letter.postalmethods.com>' with an unchecked checkbox. A mouse cursor is pointing at the unchecked checkbox of the second entry.

In the next screen, **make sure that the box next to: Attach Invoice PDF is Checkmarked**



The screenshot shows a checkbox labeled 'Attach Invoice PDF' which is checked. A mouse cursor is pointing at the checked checkbox.

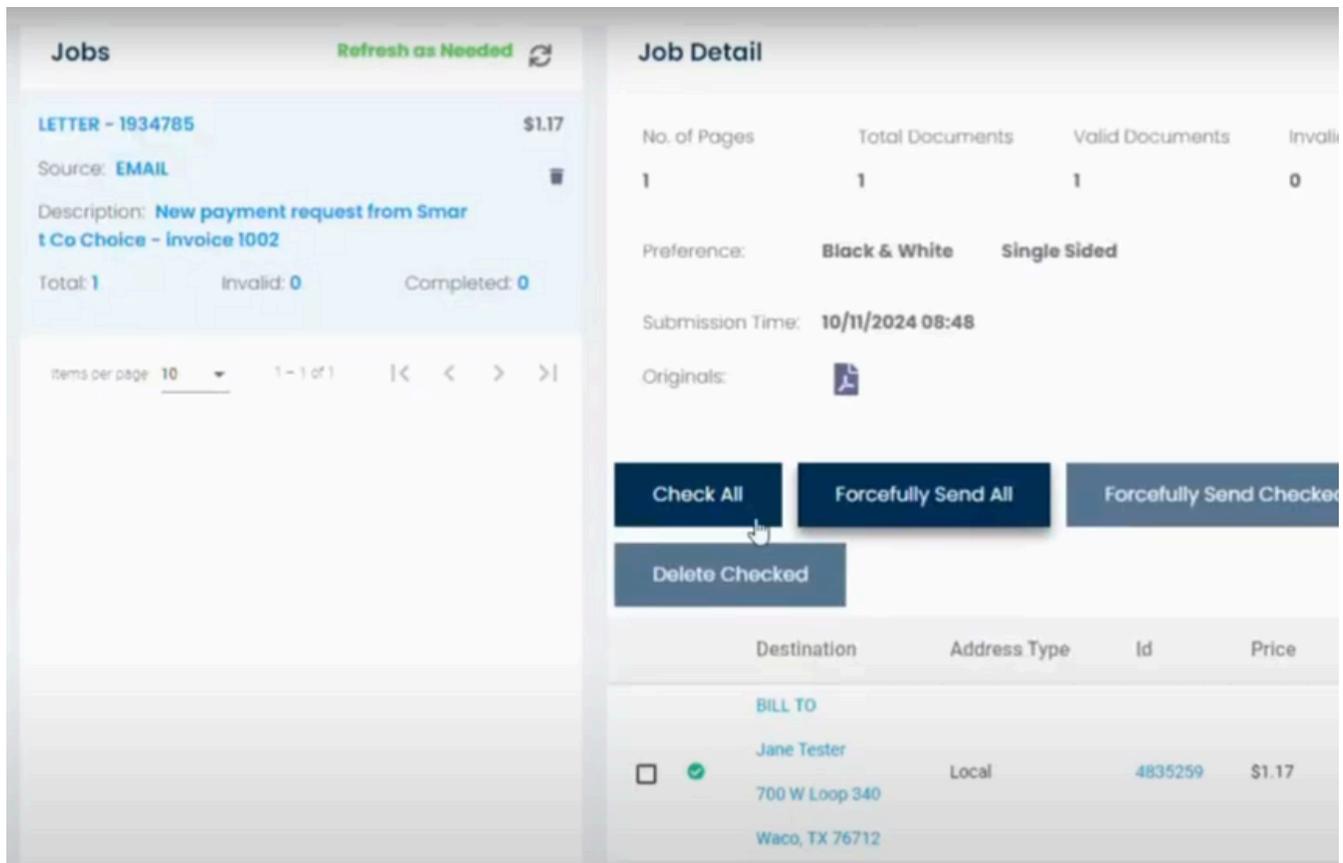
Now **Click on Send**



The screenshot shows two buttons: 'Send' and 'Cancel'. The 'Send' button is highlighted in blue and has a mouse cursor pointing at it.

Processed Documents

Now that the invoice or invoices have been sent to Postal Methods, you can then see them on the Processed Documents page, after you have refreshed your screen.



The screenshot shows the 'Jobs' and 'Job Detail' pages. The 'Jobs' page displays a job titled 'LETTER - 1934785' with a price of '\$1.17'. The source is 'EMAIL' and the description is 'New payment request from Smart Co Choice - Invoice 1002'. The status is 'Total: 1', 'Invalid: 0', and 'Completed: 0'. The 'Job Detail' page shows the following information:

No. of Pages	Total Documents	Valid Documents	Invalid Documents
1	1	1	0

Preference: **Black & White** **Single Sided**

Submission Time: **10/11/2024 08:48**

Originals: 

Buttons: **Check All**, **Forcefully Send All**, **Forcefully Send Checked**, **Delete Checked**

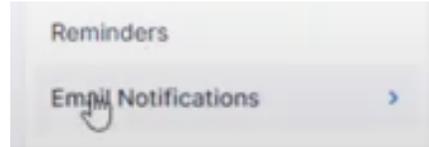
Destination	Address Type	Id	Price
BILL TO			
<input type="checkbox"/>  Jane Tester	Local	4835259	\$1.17
700 W Loop 340			
Waco, TX 76712			

How to send a Paper Invoice to ALL your customers

Click on **Settings gear** at top right of page



Select **Email Notifications**



Now **Click on Show Mail Content**

Invoice - %InvoiceNumber% from %CompanyName%
[Show Mail Content](#) | [Attachments](#)

Now **add to the Bcc block**, the following email address: **send@letter.postalmethods.com**

Bcc

<send@letter.postalmethods.com> X

Now **make sure to Checkmark the Box** labeled: **Set this to default** and then **Click on Save**

