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
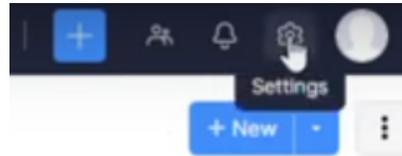
Now **Click on Profile**
Confirm that the Sender email address is
the same as the email address in Postal Methods

These should match
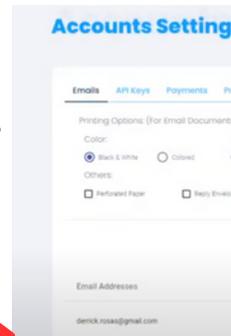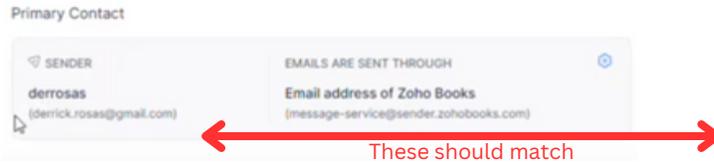
Now **Go back to Setting gear** at top right of page
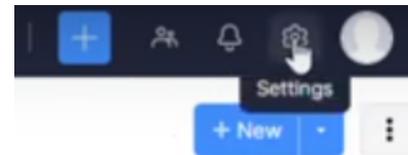
Now **Click on PDF Templates**
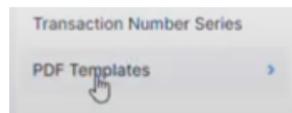
Now **Hover over Standard Template & Click on Edit**
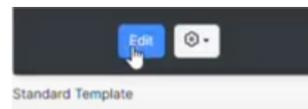
Now **name your Template: Postal Methods**
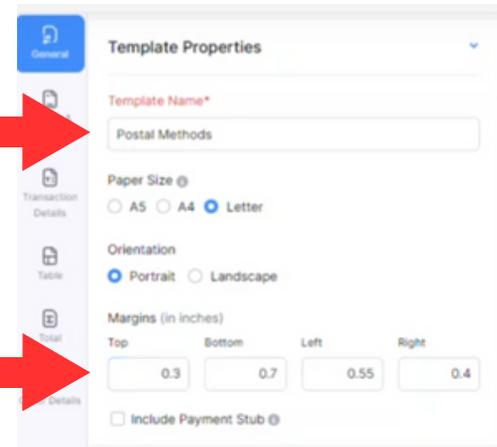
Make sure the **Top Margin is changed to 0.3** and
Click on Save on the top right corner

Now **go back to Edit** and then **Select Transaction Details**
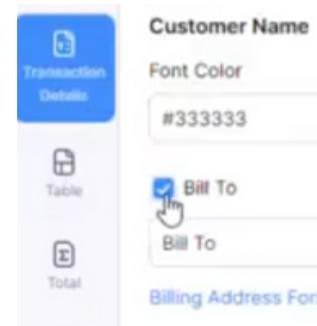
Checkmark the box next to: Bill To

Now **Click on Billing Address Format (Custom)**
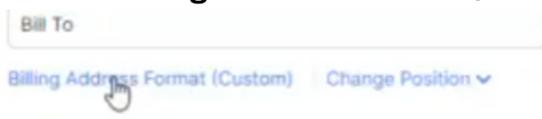
Make sure the **Placeholders look like this**:

Now **Hover over new Template** and
Click on Gear Icon and Select Set As Default
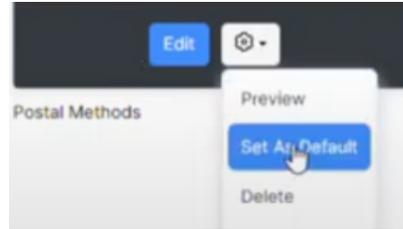
Now **Click on Close Settings** at the top Right Corner

Now **Hover over Sales and Click on Customers**
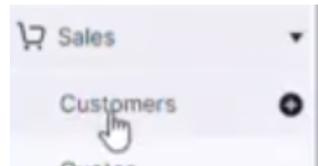
Select a Customer, then Click on Edit

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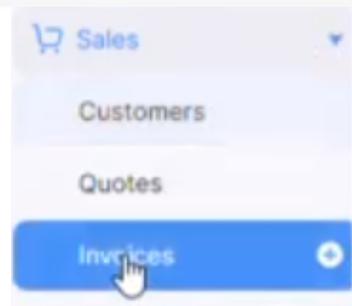
Now **Hover over Sales and Click on Invoices**

Now **Click on New Invoice**

Select one of your customers
Then fill out your invoice as needed

Make sure you **Checkmark the box by the new user you added** then **select Save and Send**
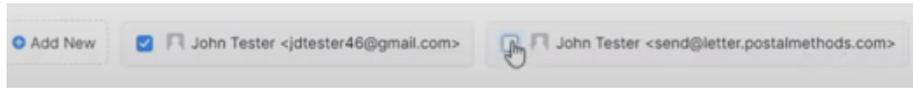
In the next screen, **make sure that the box next to: Attach Invoice PDF is Checkmarked**
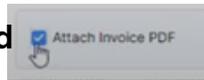
Now **Click on Send**
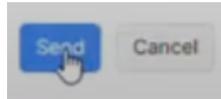
Processed Documents

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.

How to send a Paper Invoice to ALL your customers

Click on Settings gear at top right of page

Select Email Notifications

Reminders

Email Notifications ›
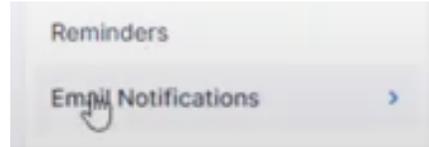
Now **Click on Show Mail Content**

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> ✕

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

☑ Set this to default

Save   Cancel