



Making Payments

To handle invoicing and payments, Zoho FSM has built-in integration with [Zoho Invoice](#). This will allow you to conveniently and quickly create invoices for your work orders and offer a secure way to your contacts to make payments. This means your billing times are greatly reduced, resulting in immediate payments and realization of revenue. You will have two options available:

- You can either record an [offline payment](#)
- provide customers the options to make [online payments](#)

In Zoho FSM, you can record your payments from two places:

- [Invoices created for a work order](#)
- [Payments module](#)

Make a Payment

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

1. Select the **Work Orders** module from the **Work Order Management** menu and click the work order whose invoices you want to record the payment for.
2. Select the **Invoices** tab and click on the **Invoice Number** to open the invoice.
3. Click **Record Payment**.

[Open In ZohoBooks](#)

Sent

Endeavour Pvt Ltd.Colorado
U.S.A.**Invoice**

INV-000154

Balance Due
\$107.00

Bill To

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

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
2	Waterproof Tile Gap Filler SKU : CLN-TS-BK-WXS	1.00	20.00	7.00	1.40	20.00
Sub Total						100.00
Sales tax (7%)						7.00
Total						\$107.00
Balance Due						\$107.00

Send Invoice

Record Payment

4. 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**.

FSM Home Customers Work Order Management Dispatch Console Services And Parts Assets Workforce Reports Professional Trial Upgrade

Work Orders **WO128**
Dripping faucet

New Service Invoiced Visaal KS Cancel Edit

Work Order Details

Requests --

Estimates --

Parent Work Order --

Contact Details

Company Zylker Inc.

Contact Lucy Robins

Timeline Services and parts Service appointments Notes Related list **Invoices**

Invoices + Create

Invoice Number	Status	Date	Due Date	Total	Balance
INV-000154	paid	Apr 25, 2024	Apr 25, 2024	\$ 107.00	

Payments Module

Permission Required: [Payments](#)

Record a Payment

To add a payment:

1. Select **Payments** from the **Billing** menu and click **Create**.
2. Select a customer (Company/Contact).
The fields to record payments and the list of **Unpaid Invoices** will be displayed
3. In the **Amount Received** field, enter the amount you want to pay. The current date will be prefilled in the **Payment Date** field. You can change this date if required.
4. Under **Unpaid Invoices**, in the Payment field for each invoice, enter the amount received for each invoice.
You can record the full or partial amount. You can also leave an invoice as unpaid.
Only the invoices with **Sent** status will be listed here.
5. Click **Save**.

Any **Amount in Excess** will be stored as [Credits](#). The payment added here will reflect in [Zoho Books/Invoice](#) too.

Record Payment ✕

Customer Details

Company

Contact

Payment Summary

Amount Received

Payment Date

Payment Mode

Reference#

Notes

Unpaid Invoices

Invoice Date	Invoice Number	Invoice Amount	Amount Due	Payment
2024-08-25	INV-000005	\$ 37.28	\$ 37.28	\$ 30.00
2024-08-24	INV-000003	\$ 37.28	\$ 7.28	\$ 0.00
2024-08-25	INV-000004	\$ 48.72	\$ 48.72	\$ 48.72

**List contains only SENT invoices

Total	\$ 78.72
Amount Received	\$ 100.00
Amount Used For Payments	\$ 78.72
Amount Refunded	\$ 0.00
Amount in Excess	\$ 21.28

Send Receipt

Once the payment is recorded, you can send the receipt to the customer. To do so:

1. Select **Payments** from the **Billing** menu and in the List view, click **Payment #** for the desired payment.
2. In the *Payment* overlay, click **Send Receipt**.

Payment
✕

[Open In Zoho Books](#)

Zylker
Arkansas
U.S.A.

PAYMENT RECEIPT

Payment Date	01 Aug 2024	<div style="background-color: #4CAF50; color: white; padding: 10px; border-radius: 5px;"> Amount Received \$100.00 </div>
Reference Number	HDBI201866	
Payment Mode	Bank Transfer	

Bill To
Acme Inc.
55 Church St
New York
10007 New York
United States

Over payment
\$21.28

Payment for

Invoice Number	Invoice Date	Invoice Amount	Payment Amount
INV-000005	25 Aug 2024	\$37.28	\$30.00
INV-000004	25 Aug 2024	\$48.72	\$48.72

3. Click **Send**.

Send Payment Receipt
✕

Send To

[Redacted]
✕
▼

Show Cc Show Bcc

Payment Received

Dear Acme Inc.,

Thank you for your payment. It was a pleasure doing business with you.
We look forward to work together again!

Payment Received

\$100.00

Invoice No	INV-000004, INV-000005
Payment Date	01 Aug 2024

Regards,
George Costanza
Zylker

Attach Payment Receipt PDF

Cancel
Send

Online Payment

Your customers can make online payments for the invoices you sent them. For this option to be available, you need to configure a payment gateway in Zoho Invoice/Books. If you configure a payment gateway in Zoho [Invoice/Books](#) (**Settings > Online Payments**), that payment gateway will be available as the default payment option in your invoice. If multiple payment gateways are configured, all those will be listed in the online payment options section (refer to the screenshot below) of the invoice and you can choose the ones through which you wish to receive the payment.

Select an online payment option to get paid faster 

Zoho Payments (Card)

 Account verification pending. [Update Required Data](#)

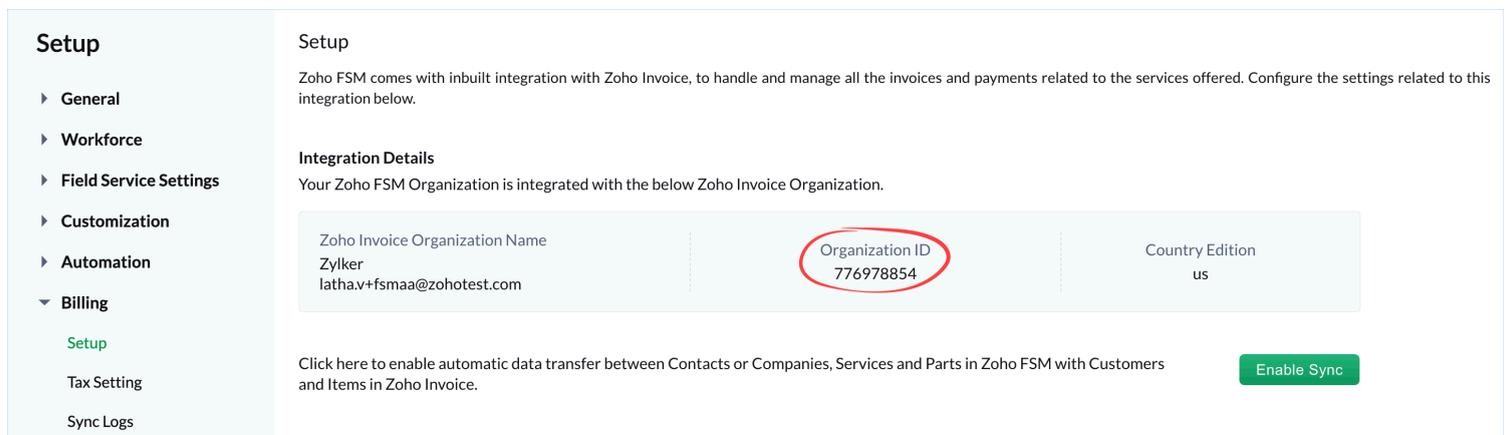
PayPal Standard Business

WePay (Card)

Stripe (Card)

Allow customer to make partial payments for this invoice.

Ensure that you configure the payment gateways in the correct Zoho Invoice/Books organization. You can navigate to the Zoho Invoice/Books organization by clicking on the **Organization ID** in **Setup > Billing > Setup** in FSM.



The screenshot shows the 'Setup' page for Billing integration. On the left is a navigation menu with 'Billing' expanded to show 'Setup', 'Tax Setting', and 'Sync Logs'. The main content area is titled 'Setup' and contains the following information:

- Integration Details:** Your Zoho FSM Organization is integrated with the below Zoho Invoice Organization.
- Table:**

Zoho Invoice Organization Name	Organization ID	Country Edition
Zyker latha.v+fsmaa@zohotest.com	776978854	us
- Action:** Click here to enable automatic data transfer between Contacts or Companies, Services and Parts in Zoho FSM with Customers and Items in Zoho Invoice. [Enable Sync](#)

To make a payment, the customer will have to do the following from the invoice email or the invoice link:

1. Click **Pay Now**.

The payment gateways that you had selected in the invoice will be listed at the bottom of the invoice.

Invoice with Data

\$116.48

Balance Due

Invoice #: INV-001
Due Date: 10 Aug 2022



Pay Now

Outstanding

Invoice with Data
Illinois
U.S.A.

INVOICE

INV-001

Balance Due
\$116.48

Bill To
Ms. Lucy Robins
1251 Oak St, Bakersfield,
93304 California
U.S.A.

Invoice Date : 10 Aug 2022
Terms : Due on Receipt
Due Date : 10 Aug 2022

#	Item & Description	Qty	Rate	Amount
1	Plumbing	1.00	100.00	100.00
2	Beehive Max Toilet Plunger	1.00	16.48	16.48
			Sub Total	116.48
			Total	\$116.48
			Balance Due	\$116.48

Notes

Thanks for your business.

Payment Options

Created securely using Invoice

To manage invoices & payments for free, visit localzoho.com/invoice

2. Click **Proceed to Payment**. The user will be taken to the payment gateway's website.

Invoice with Data



INV-001

10 Aug 2022

Balance Due

\$116.48

PayPal

Credit Card

PROCEED TO PAYMENT

If they choose to pay by credit card, they can enter the card details and click **Make Payment**.

Invoice with Data

 **INV-001**
10 Aug 2022

Balance Due
\$116.48

PayPal

Credit Card

Pay swiftly through your credit card.

CARD DETAILS

Your card details are sent to WePay via secure SSL connection for payment processing. We do not store your card information in our servers.

Card Number*

4111-1111-1111-1111 VISA

Expires on*

09 2024

CVV*

...

First Name Last Name

Lucy Robins

BILLING ADDRESS

The billing address entered here must match the billing address of the card holder.

Country *

United States

Address *

1251 Oak St, Bakersfield,

City *

Postal/Zip Code *

93304

State *

California

MAKE PAYMENT

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.

The screenshot shows the 'Record Payment' form in Zoho FSM. The form is titled 'Record Payment' and has a search bar at the top. The left sidebar shows the navigation menu with 'Payments Received' selected. The form fields are as follows:

- Customer Name***: Zylker Inc. (highlighted with a red box)
- Branch**: Head Office
- Amount Received***: USD 300 (highlighted with a red box)
- Bank Charges (if any)**: Would you like this amount to be reflected in the Payment field? (Yes/No buttons, with a red arrow pointing to 'No')
- Payment Date***: (empty)
- Payment #***: 133
- Payment Mode**: Cash
- Deposit To***: Petty Cash
- Reference#**: (empty)

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

3. Click **Continue to Save**.

The screenshot shows the 'Excess Payment' popover. It has a title bar with a close button (X). The main content area contains:

- A warning icon (yellow triangle with exclamation mark).
- The text: "Would you like to store the excess amount of **\$300.00** as over payment from this customer?"
- A note: "Note: The excess amount will be deposited in the **Unearned Revenue** (with a link icon)."
- Two buttons at the bottom: "Continue to Save" (blue) and "Cancel" (grey).

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.

Invoice
INV-000157
Balance Due
\$79.60

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

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

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	<input type="text" value="79.6"/>

Amount to Credit: 79.6
Invoice Balance Due: 0

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.