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transaction preferences such as the ability to give discounts across the board, or individually, the option to add shipping charges and adjustments to an invoice, and ...

Mary Girsch-Bock • Mar. 20, 2017



Zoho Invoice – www.zoho.com

From the March 2017 [review of Invoice Management systems](#).

Zoho Invoice offers quick, convenient invoicing for freelancers and small business owners. Web-based, Zoho also offers mobile apps for iPhones, Android, and Windows phones. Zoho boasts that users can create invoices in under two minutes, and allows users to choose the template they prefer during the initial product setup phase.

Users can easily create a customer estimate in Zoho, or import an existing estimate if

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separate tax rates at all.

The invoice entry screen allows users to add a personalized customer note to the invoice, add any Terms and Conditions if appropriate and attach relevant documents to the invoice. To make the invoice recurring, users can just click on the Make Recurring option at the bottom right side of the invoice entry screen.

There is no option for automatic late fees, but users can apply a late fee to an invoice using the Adjustment option at the bottom of the invoice. Discounts can also be applied to an invoice using the adjustment option as well. The application accepts multiple currencies, with users able to add any currencies that they will be accepting. Exchange rates can be imported when needed in order to make the necessary adjustments when billing overseas customers and those not utilizing the multi-currency option can choose to disable the exchange rate feed.

Zoho offers multiple payment options, including PayPal, online credit card payment, payment from an ACH transfer, or users can choose to add other payments such as cash or checks manually. Customers can also choose to pay their invoice using the client portal, if desired.

Zoho offers a built-in time and expense tracking option, with users able to use the timer to record project time and later bill that time in an invoice.

Zoho offers a surprising number of system reports, including an aging summary, aging details, invoice details, estimate details, and bad debts, as well as various payments received report.

Zoho Invoice is an independent invoicing application and does not offer integration within the product to a GL or other financial applications, though they do offer online accounting software – Zoho Books. The product also offers integration with

other apps including numerous payment and credit card processing apps, contacts,

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