Recurring Invoices

Zoho CRM Extension

User Manual

Version 1.0

Prepared By:

Dhruvsoft
BUILD • DEPLOY • SUPPORT

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Recurring Invoices Extension for Zoho CRM User Manual

1. Overview

Recurring Invoice Extension is an automated invoice creation solution for Zoho CRM. Recurring Invoices are a convenient way for businesses to bill customers for goods and services provided regularly, such as weekly, monthly, quarterly, or yearly, and also trigger them on the customer's mail according to the due date as a reminder.

Extension for Recurring Invoices is developed by Dhruvsoft Services Pvt. Ltd., a Zoho Partner, and available on Zoho Marketplace for all Zoho users to deploy as an extension for Zoho CRM.

Using this extension, Zoho CRM users can easily create Recurring Invoices automatically by choosing the frequency of subscription and it will also trigger reminder mails by sending invoices before the due date.

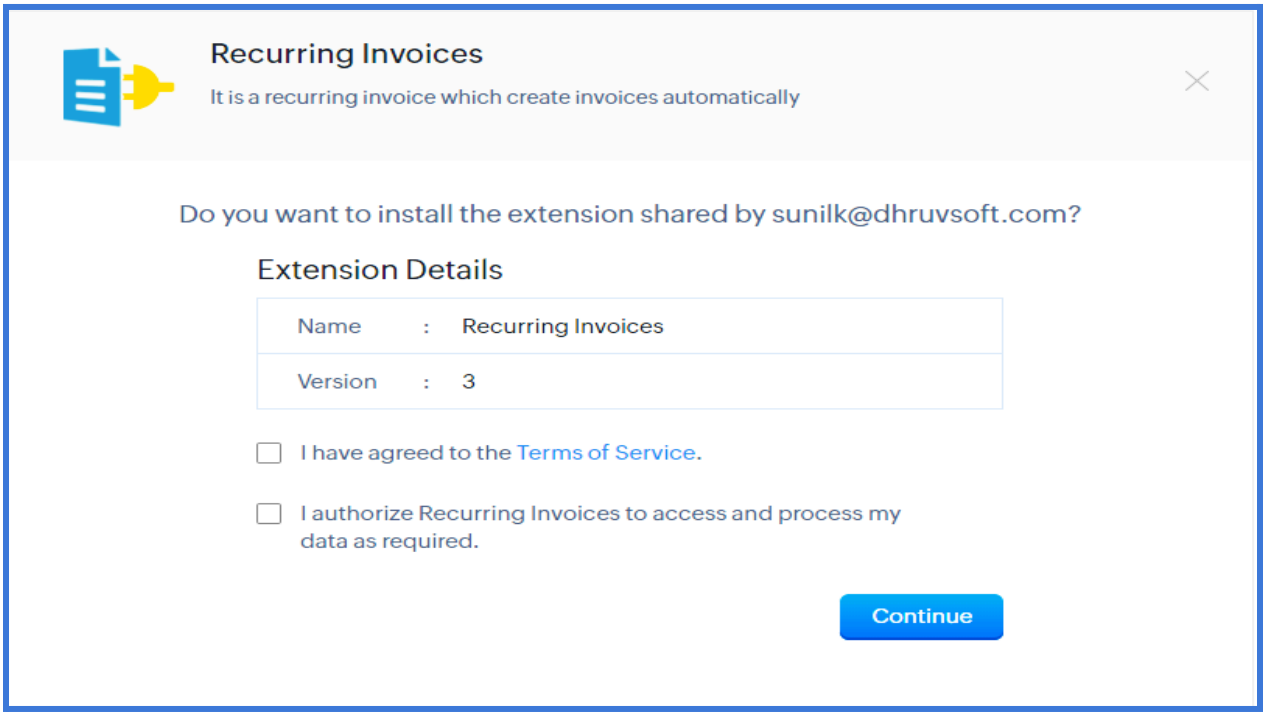
This user manual document provides step-by-step instructions to install this extension from Zoho Marketplace, and how to configure and use the functionality within your Zoho account.

1.1 Install the Recurring Invoice Extension

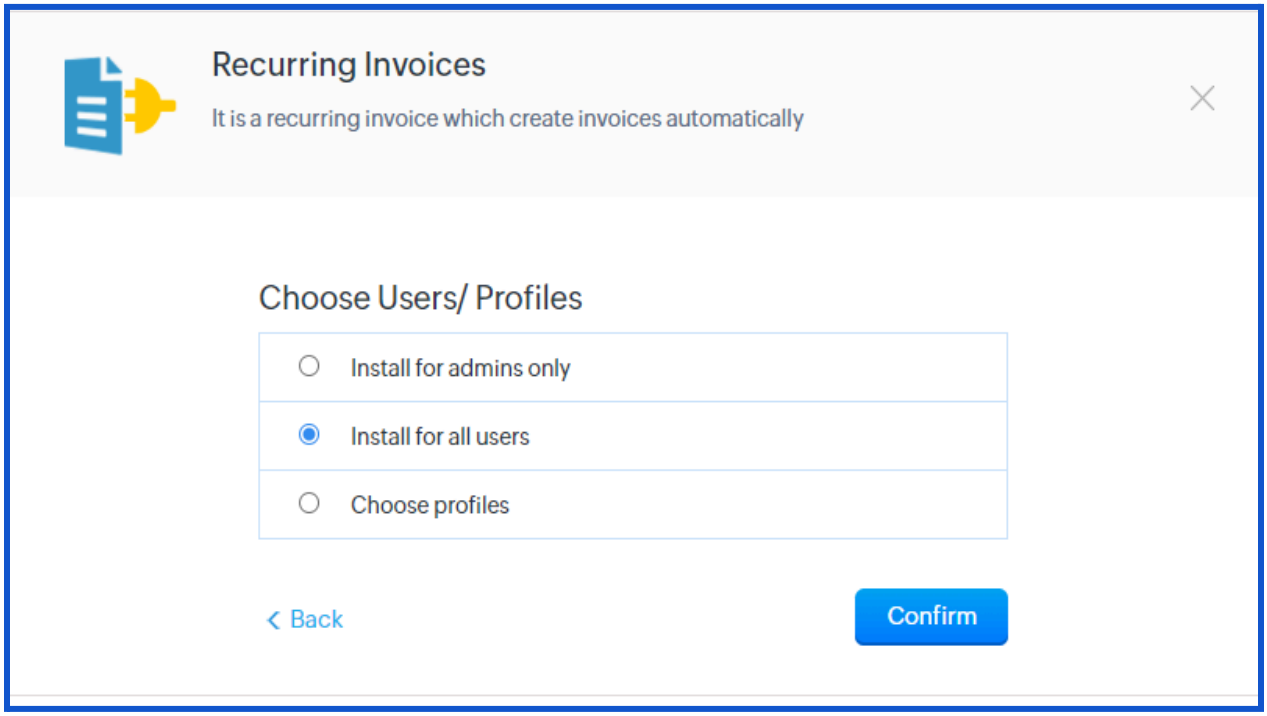
Go to Zoho Marketplace and search for **"Recurring Invoices for Zoho CRM"** to locate and install the extension directly from the Marketplace. Alternatively, you can install the Recurring Invoices by logging into your Zoho CRM account and following the below installation instructions.

To install the Recurring Invoice Extension From Zoho CRM:

- Go to **Setup** > **Marketplace** > **All**. All the Zoho Extensions installed within your Zoho CRM account are listed by default. Go to the "**All Extensions" tab** to view all available Extensions.
- Click **ALL Extension,** browse search for **Recurring Invoices for Zoho CRM,** locate, and then click on Extension. The details about the extension will be shown in the screenshot below.
- Click the **Install** button.



❖ Select the users/profiles for which the extension needs to be installed and click "**Confirm".**



❖ After clicking Extension, it will start installing.

- After successfully installing the Extension then it will show what modules are present in the Recurring Invoices Extension.

Modules:

- **Quotes**
- **Recurring Invoices**
- **Invoices**

1.2 Uninstall the Recurring Invoices Extension

Uninstalling this extension from the Zoho CRM will delete all its associated data. To uninstall Recurring Invoices Extension, please follow the steps below:

- Go to **Setup** > **Marketplace** > **All Installed** tab.
  All the installed extensions will be listed.
- Browse for **Recurring Invoices Extension** and click on the **Uninstall** link.
- Click **Okay** to confirm in the confirmation pop-up that follows. The extension will be uninstalled.

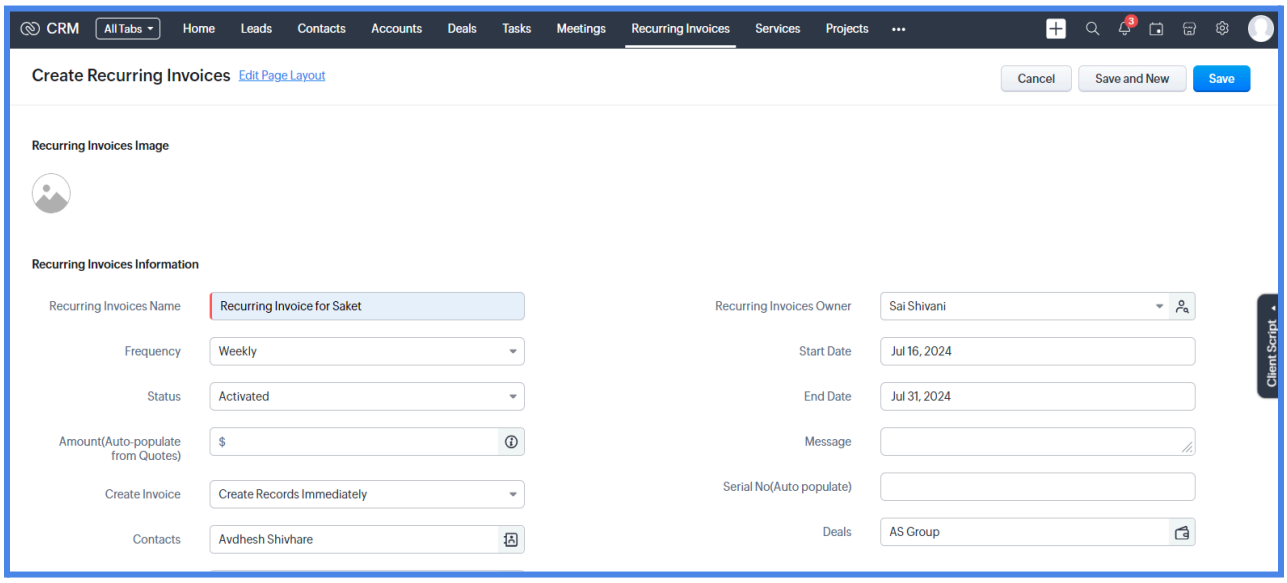
2. Recurring Invoices

Recurring Invoices is the custom module in **"Recurring Invoices"** After filling in the details in the recurring invoices module the recurring invoice will create recurring invoices based on frequency in the Invoices module using automation.

2.1 Recurring Invoices Fields

Field Name	Field Type	Mandatory Field	Options
Recurring Invoice Name	Text Field	Yes	-
Contacts	Lookup	Yes	-
Quotes	Lookup	Yes	-
Start Date	Date	Yes	-
End Date	Date	Yes	-
Deals	Lookup	Yes	-

Frequency	Picklist	Yes	• Weekly • Monthly • Quarterly • Yearly
Status	Picklist	Yes	• New • Activated • Deactivated
Message	Textarea	Auto-populate with errors	
Amount	Currency	Auto-populate from Quotes	
Create Invoice	Picklist	Yes	• Create Records Immediately • Create on Specific Date

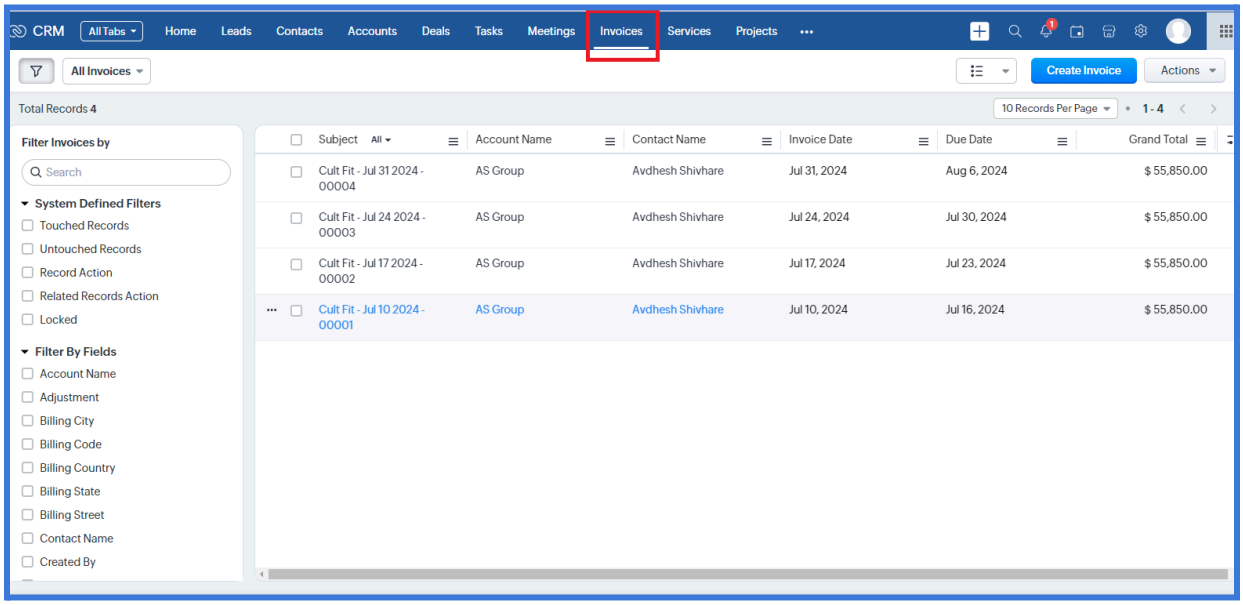


NOTE:

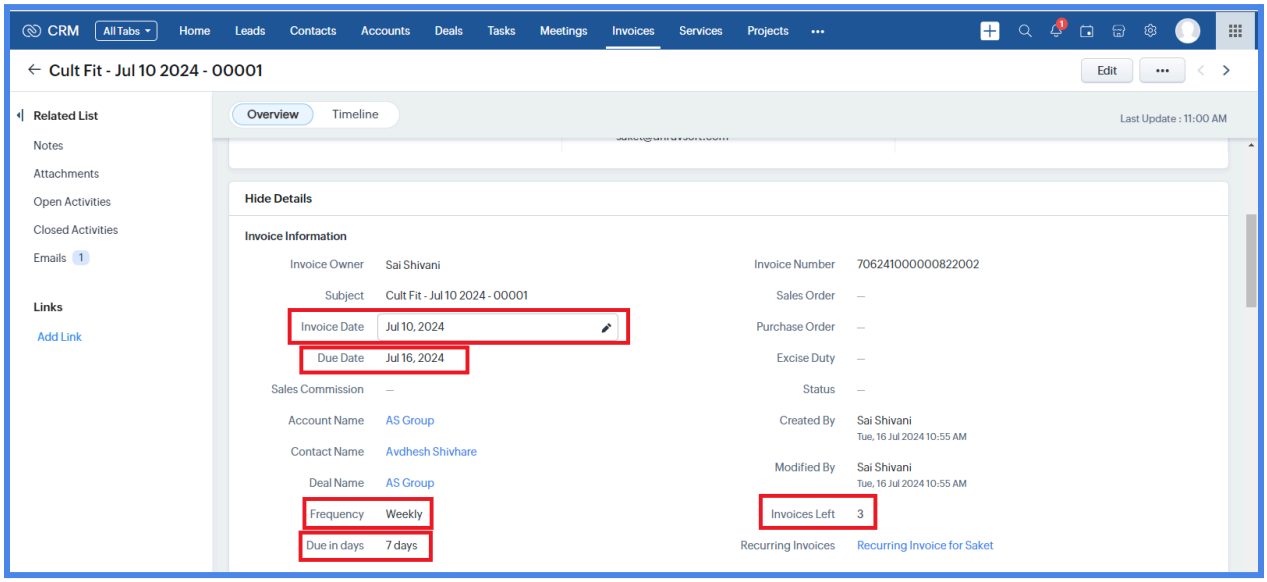
- Messages and Amount fields are empty but will update automatically after saving the records.
- Create Records Immediately will create all the invoices instantly.
- Create on Specific Date will create the invoices on invoice date.

3. Invoices

After saving the recurring Invoices the invoices will be created automatically in the Invoices module based on frequency, start date, and end date.



3.1 Fields and Information in Invoice Module

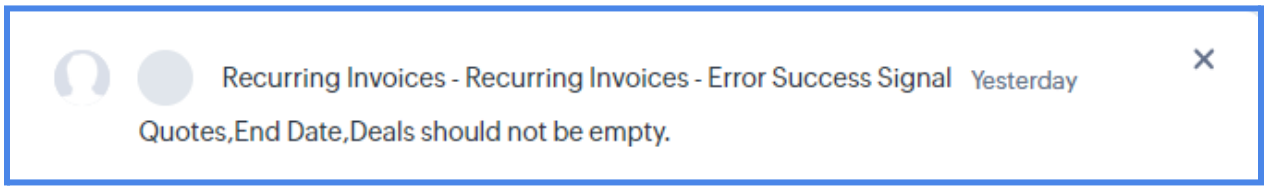


Fields	Type	Validation
Invoice Date	Auto-populate	It is the starting date of the Invoice
Due Date	Auto-populate	It is the due date of the Invoice
Frequency	Auto-populate	Frequency of Invoice
Due in days	Auto-populate	Invoice Due days
Invoices Left	Auto-populate	Count of remaining Invoices

The invoices will be created automatically with all the fields.

4. Sales Signals in Recurring Invoices

The user will receive real-time notifications for the Recurring Invoices functionality inside the Zoho CRM as Sales Signals. Sales Signal notifications are displayed when you click on the top-right corner of the Zoho CRM home page. The signal will be raised when a recurring invoice is created with the message



5. Support Contact For Recurring Invoice Extension:- Dhruvsoft Services Pvt. Ltd.

Thank you for installing the Recurring Invoice Extension. If you have any questions or are facing any installation issues, please feel free to contact the Dhruvsoft Support Desk for Zoho Extensions via email at support@dhruvsoft.com or call us at (+91 9704056000)

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