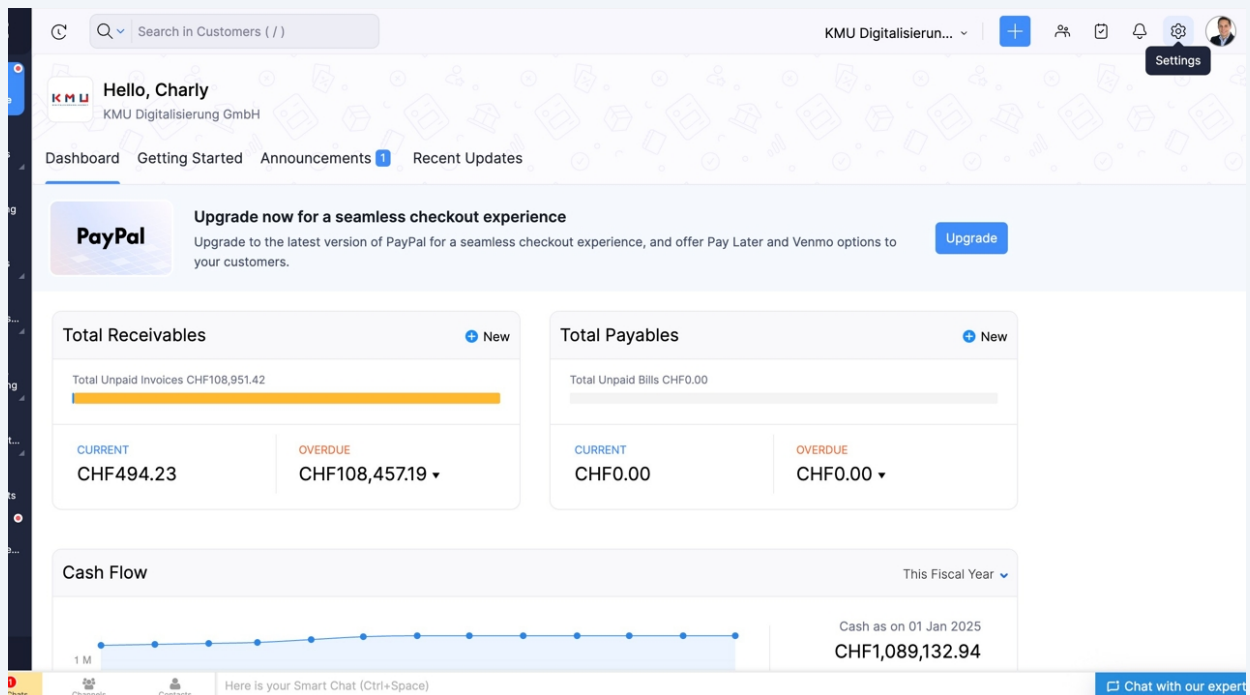


Set up und erstellen von QR Rechnungen mit Zoho Books

Anleitung zu Installation der QR Bills Erweiterung in Zoho Books inkl. generierung des API Keys in QRModul.ch

1 Gehen Sie auf <https://books.zoho.eu/> und loggen Sie sich ein in Ihr Zoho Account



2 Klicken Sie auf das Zahnrad

The screenshot shows the 'Hello, Charly' dashboard for 'KMU Digitalisierung GmbH'. The top navigation bar includes a search bar, a user profile, and a settings gear icon. The main content area features a 'PayPal' banner with an 'Upgrade' button. Below this, there are two summary cards: 'Total Receivables' and 'Total Payables'. The 'Total Receivables' card shows 'Total Unpaid Invoices CHF108,951.42' and a bar chart. It also displays 'CURRENT CHF494.23' and 'OVERDUE CHF108,457.19'. The 'Total Payables' card shows 'Total Unpaid Bills CHF0.00' and 'CURRENT CHF0.00' and 'OVERDUE CHF0.00'. Below these is a 'Cash Flow' line chart and a 'Cash as on 01 Jan 2025' value of 'CHF1,089,132.94'. At the bottom, there is a 'Smart Chat' bar and a 'Chat with our experts' button.

Search in Customers (/)

KMU Digitalisierung...

Hello, Charly
KMU Digitalisierung GmbH

Dashboard Getting Started Announcements Recent Updates

PayPal Upgrade now for a seamless checkout experience
Upgrade to the latest version of PayPal for a seamless checkout experience, and offer Pay Later and Venmo options to your customers. [Upgrade](#)

Total Receivables [+ New](#)
Total Unpaid Invoices CHF108,951.42
CURRENT CHF494.23 OVERDUE CHF108,457.19

Total Payables [+ New](#)
Total Unpaid Bills CHF0.00
CURRENT CHF0.00 OVERDUE CHF0.00

Cash Flow This Fiscal Year
Cash as on 01 Jan 2025
CHF1,089,132.94

Channels Contacts Here is your Smart Chat (Ctrl+Space) [Chat with our experts](#)

3 Wählen Sie "Marketplace" und klicken Sie

The screenshot shows the 'All Settings' page. At the top, there is a search bar and a 'Close Settings' button. The settings are organized into several categories: 'Inventory Adjustments', 'Web Tabs', 'Email Notifications', 'Workflow Actions', 'Custom Modules', 'Developer & Data', and 'Integrations & M...'. The 'Integrations & M...' section is expanded, showing a list of integrations: 'SMS Integrations', 'Zoho Apps', 'Other Apps', 'Uber for Business', 'WhatsApp', and 'Marketplace'. The 'Marketplace' option is highlighted with an orange circle. At the bottom, there is a 'Smart Chat' bar and a 'Chat with our experts' button.

Search your settings

Close Settings

Inventory Adjustments

Web Tabs
Transaction Number Ser...
PDF Templates

Email Notifications

Workflow Actions
Workflow Logs
Schedules

Custom Modules
Overview

Developer & Data
Widgets
Incoming Webhooks
Connections
API Usage
Signals
Data Backup
Deluge Components Us...

Integrations & M...
SMS Integrations
Zoho Apps
Other Apps
Uber for Business
WhatsApp
Marketplace

Channels Contacts Here is your Smart Chat (Ctrl+Space) [Chat with our experts](#)

4 Suchen Sie die Anwendung Swiss QR Bill und klicken Sie auf "Installieren"

KMU Digitalisierung... | + | | | | | | |

Close Settings ✕

Extensions | + New Extension | ?

Swiss QR Bill for Zoho Books

Generate SIX standard-compliant Swiss QR invoices directly from Zoho Books

Entwickelt von: [KMU Digitalisierung GmbH](#)

Installs • ★★★★★ (10)

Installieren

Notes | Bewertungen und Rezensionen | Anbieter

Extension for Zoho Books to generate invoices with a QR payment code. This QR code complies with the official Swiss requirements of the procedure owner SIX.

Deployment type	Zoho platform
-----------------	---------------

5 Alle 3 Checkboxen bitte bestätigen

Q Search

All Extensions | Installed Extensions

Organization >

Taxes & Compliance >

Users & Roles >

Preferences >

Sales >

Purchases >

Items >

Online Payments >

Customisation >

Reminders & Notific... >

Confirm Installation

Use of Personal Details

Folgende Daten werden an den Anbieter weitergegeben.

Name	Charly Suter
E-Mail-Adresse	charly@kmu-digitalisierung.com
Firma	KMU Digitalisierung GmbH
Jobtitel	--
Land	Switzerland

☒ I allow the vendor of the applications/extensions to contact me regarding offers, and other relevant updates.

Installieren

6 Nach dem alle Häkchen gesetzt sind, klicken Sie auf "Installieren"

Confirm Installation

Name	Swiss QR Bill for Zoho Books
Anwendungstyp	Erweiterung
Produkt (DC)	Books (books.zoho.eu)
Abonnement	Free
Portalname	KMU Digitalisierung GmbH

☒ *Nach installing this App, Sie stimmen Folgendem zu: [Nutzungsbedingungen](#) und [Datenschutzbestimmungen](#) des Anbieters.

☒ *Nach installing this App, Sie stimmen Folgendem zu: [Nutzungsbedingungen](#) von Marketplace.

Note: Before installing this extension/app, ensure that you have a valid third-party account (if required).

[Installieren](#) [Abbrechen](#)

7 Wählen Sie Ihre Organisation "KMU Digitalisierung GmbH"

Swiss QR Bill ZBooks Extension

The Zoho Books extension to create Swiss QR Invoices and optional to send physical QR Invoices via Swiss Postal services direct from the QR Modul Lettershop.

1 Select Organization — **2 Authorize Connections**

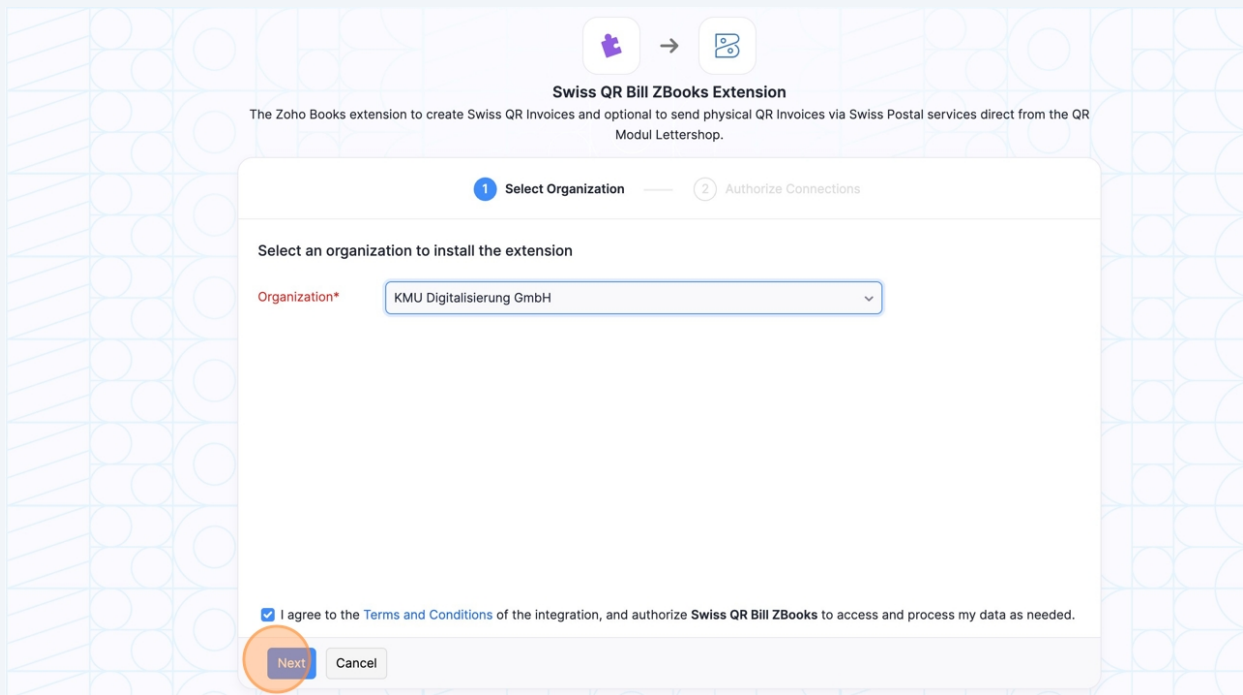
Select an organization to install the extension

Organization*

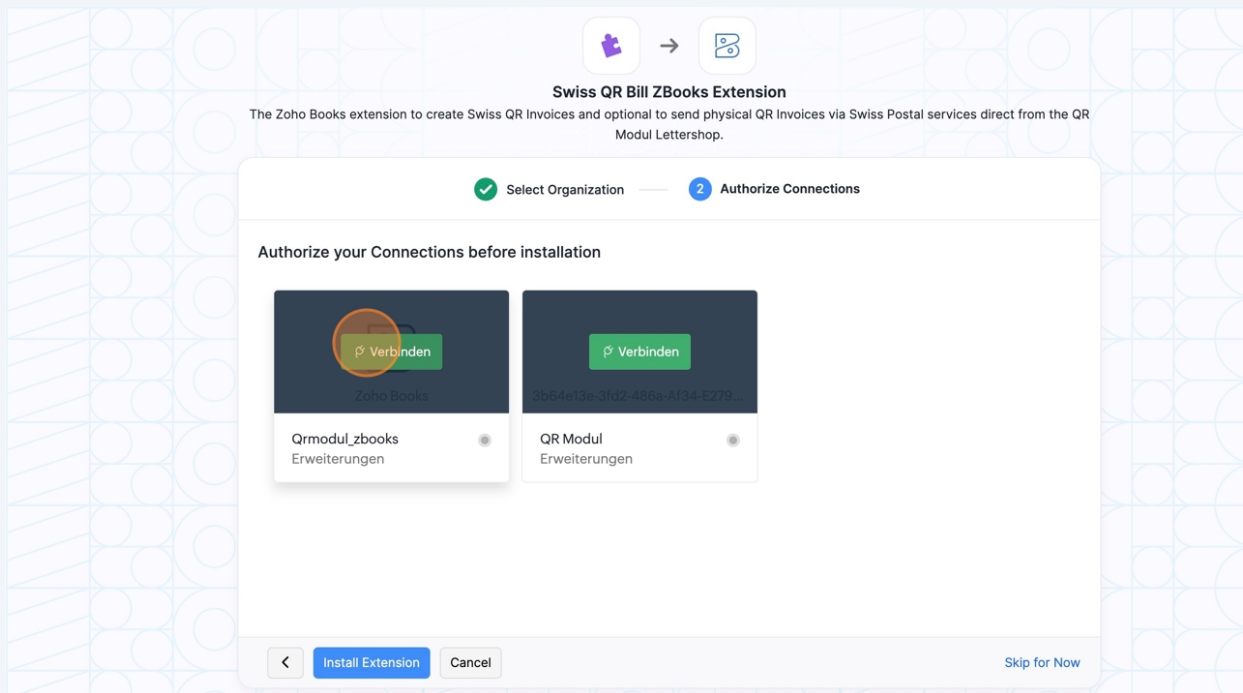
☒ I agree to the [Terms and Conditions](#) of the integration, and authorize **Swiss QR Bill ZBooks** to access and process my data as needed.

[Next](#) [Cancel](#)

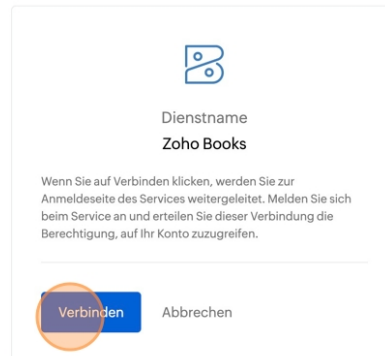
8 Klicken Sie auf "Next"



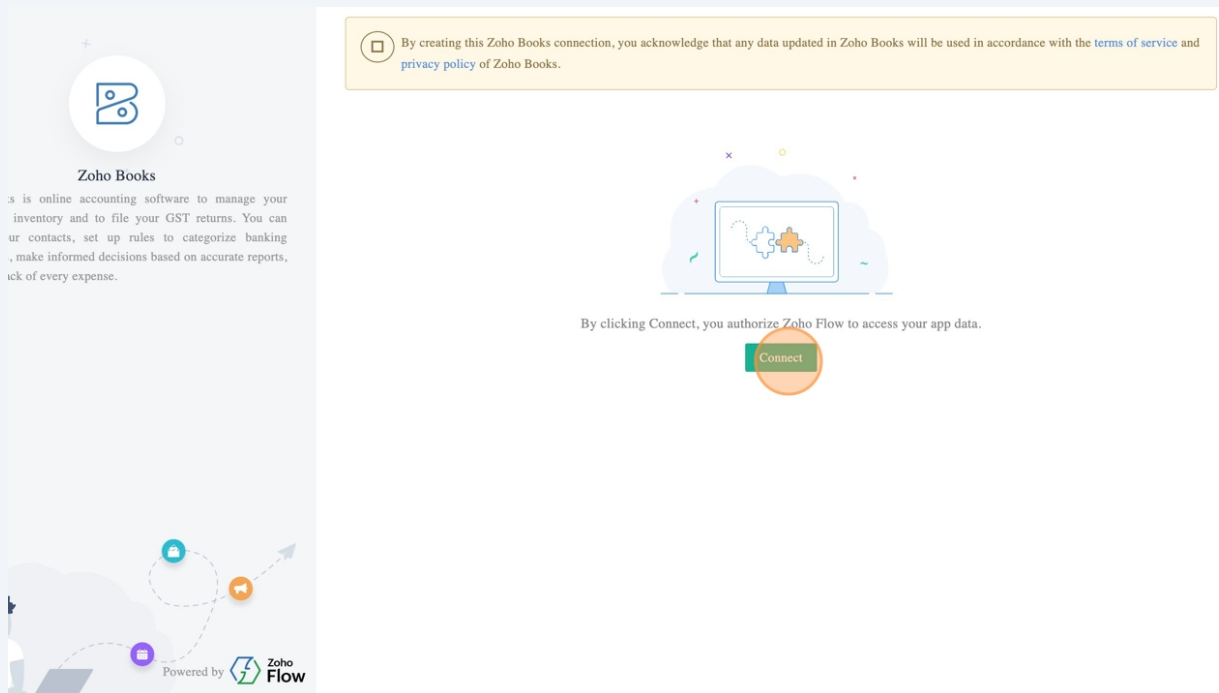
9 Jetzt Verbinden wir die Applikation mit "Verbinden"



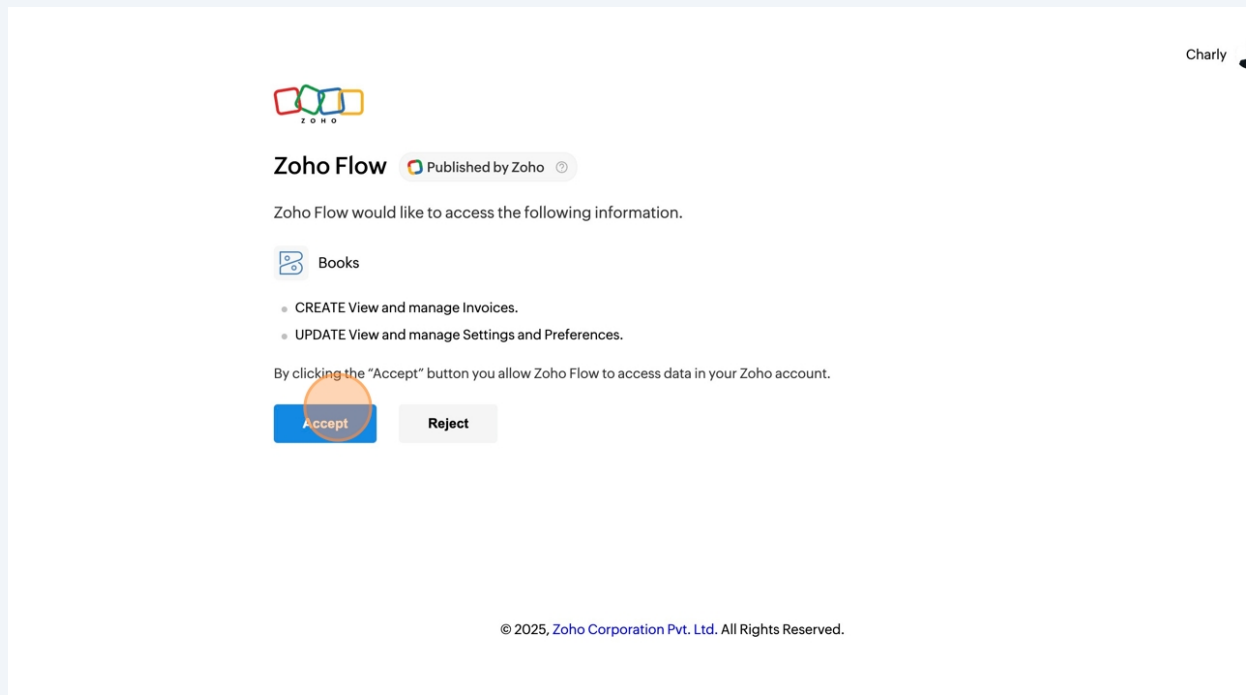
10 Klicken Sie auf "Verbinden" und bestätigen somit die Installation



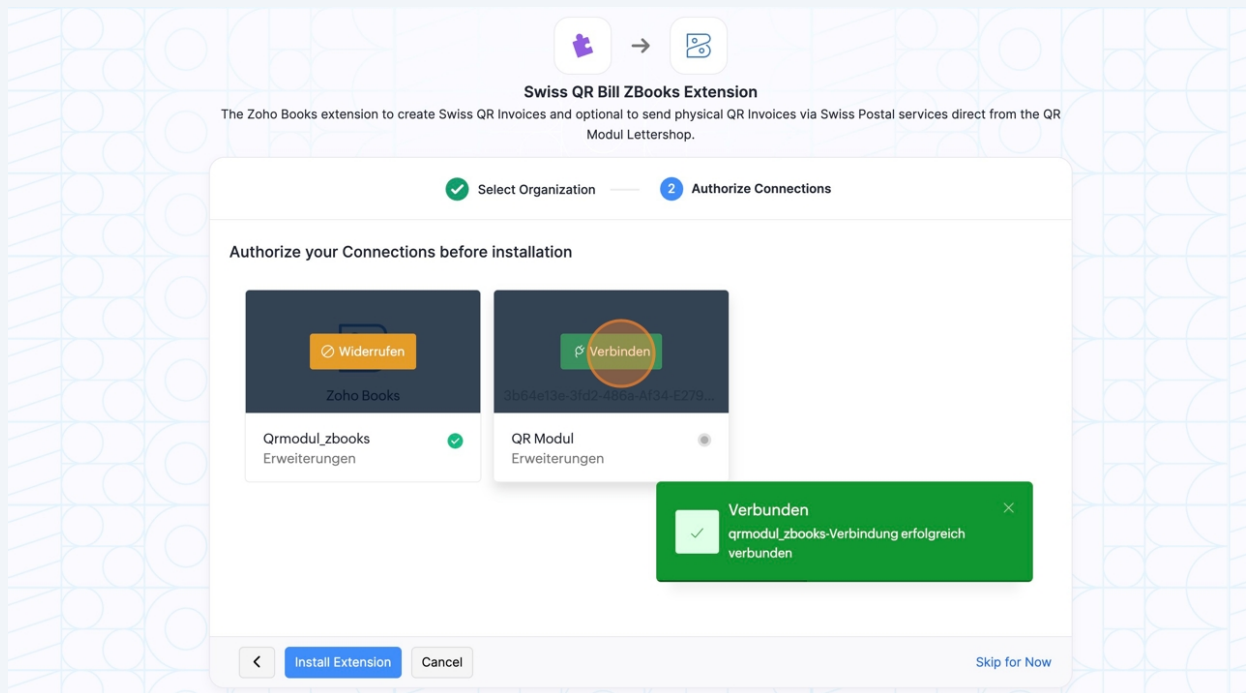
11 Klicken Sie auf "Connect" und Bestätigen Sie die Verbindung



12 Klicken Sie auf "Accept"

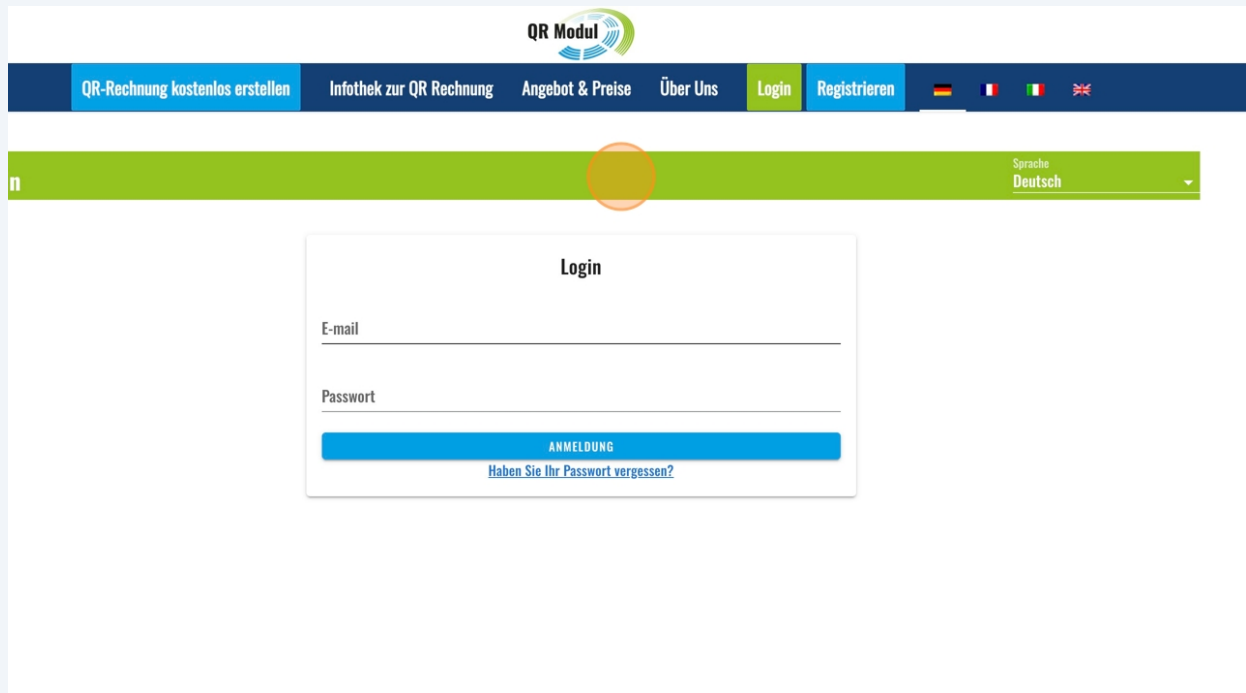


13 Jetzt richten wir die API Verbindung ein und klicken auf "Verbinden"



14 Wechsel Sie parallel dazu auf www.QRModul.ch in einem neuen Browser Tab

15 Loggen Sie sich mit Ihren Login Daten bei QR Modul ein oder erstellen sie ein entsprechendes Account.



The screenshot shows the QR Modul website interface. At the top, there is a dark blue navigation bar with the QR Modul logo and several menu items: "QR-Rechnung kostenlos erstellen", "Infothek zur QR Rechnung", "Angebot & Preise", "Über Uns", "Login", and "Registrieren". To the right of these items are flags for Germany, France, Italy, and the UK. Below the navigation bar is a green horizontal bar with the text "Sprache Deutsch" and a dropdown arrow. In the center of the page is a white login box with the title "Login". Inside the box, there are two input fields labeled "E-mail" and "Passwort". Below these fields is a blue button labeled "ANMELDUNG". Under the button is a link that says "Haben Sie Ihr Passwort vergessen?".

16 Klicken Sie auf "Mein Profil"

17 Klicken Sie nun auf "Einstellungen"

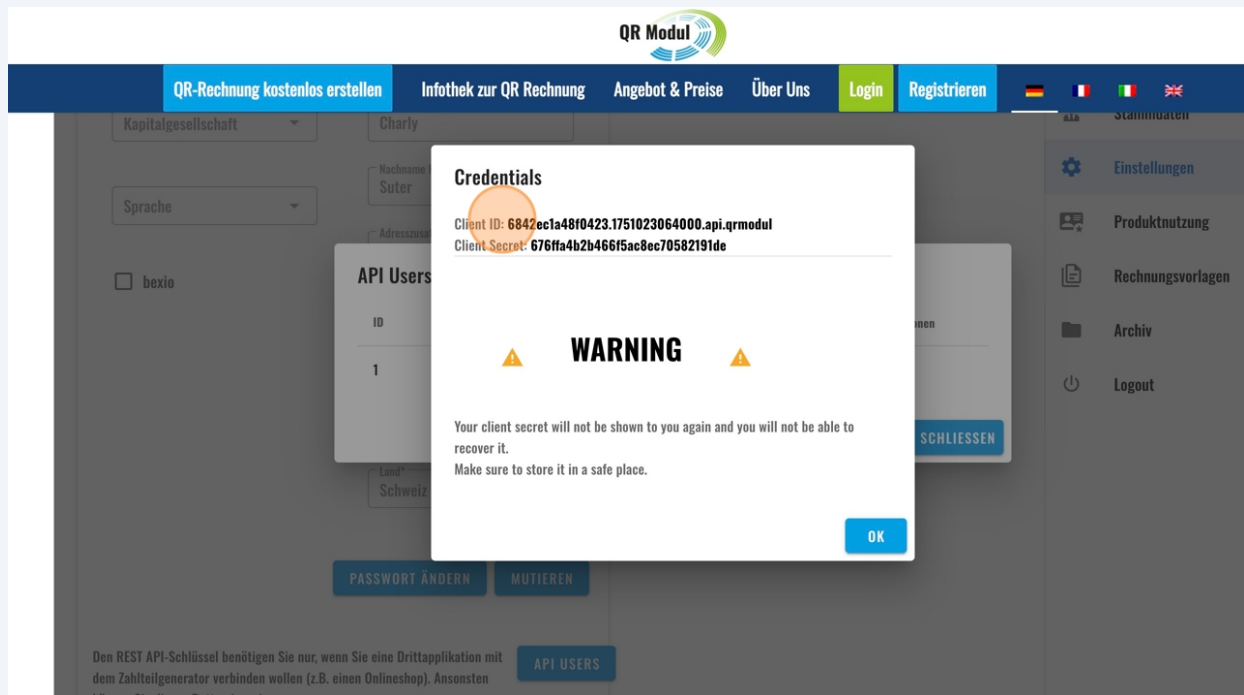
18 Hier erhalten wir den API Key unter "API USERS"

The screenshot shows the user profile page of the QR Modul system. The header includes the QR Modul logo and navigation links: "QR-Rechnung kostenlos erstellen", "Infothek zur QR Rechnung", "Angebot & Preise", "Über Uns", "Login", and "Registrieren". There are also language flags for German, French, Italian, and English. The main content area contains a form for user details, including a checkbox for "bexio", a text field for "Adresszusatz" (KMU Digitalisierung), and fields for "Strasse*" (Tellistrasse), "Hausnr" (21), "PLZ*" (5000), "Ort*" (Aarau), and "Land*" (Schweiz). Below these fields are buttons for "PASSWORT ÄNDERN" and "MUTIEREN". A text block explains the REST API key, and the "API USERS" button is highlighted with an orange circle. On the right, there is a sidebar with links for "Rechnungsvorlagen", "Archiv", and "Logout".

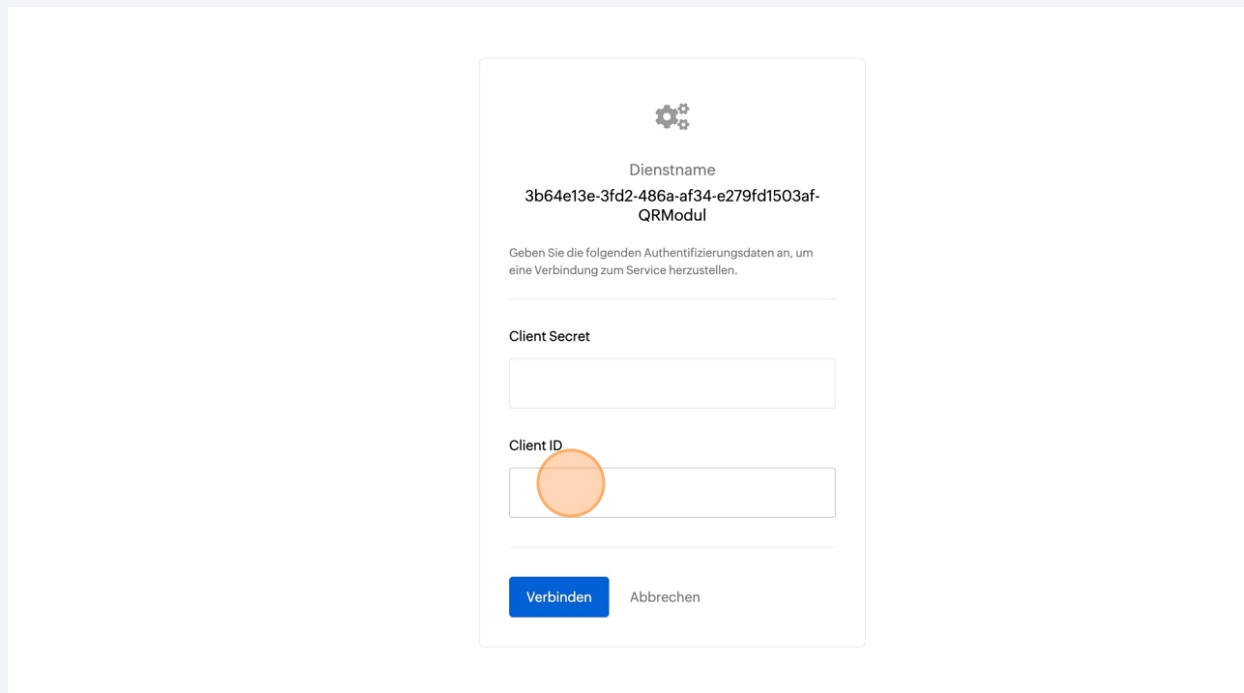
19 Generieren Sie Ihren persönlichen und individuellen KEY mit "Create new api user"

The screenshot shows the same user profile page as in the previous image, but with the "API Users" modal open. The modal contains a table with columns "ID", "Client ID", and "Aktionen". The table is currently empty, with the text "No data available" displayed below it. At the bottom of the modal are two buttons: "CREATE NEW API USER" and "SCHLIESSEN". The "CREATE NEW API USER" button is highlighted with an orange circle. The background page is dimmed, and the "API USERS" button from the previous image is still visible at the bottom.

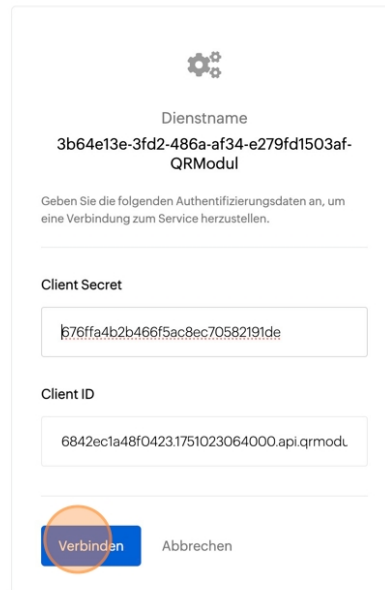
20 Kopieren Sie den Key und die Client ID in das entsprechende Feld bei Zoho



21 Hier in Zoho können Sie die Client ID und den Client Secret Key aus QRModul.ch einfügen



22 Nach dem Einfügen des Key klicken Sie auf "Verbinden"





Dienstname
3b64e13e-3fd2-486a-af34-e279fd1503af-QRModul

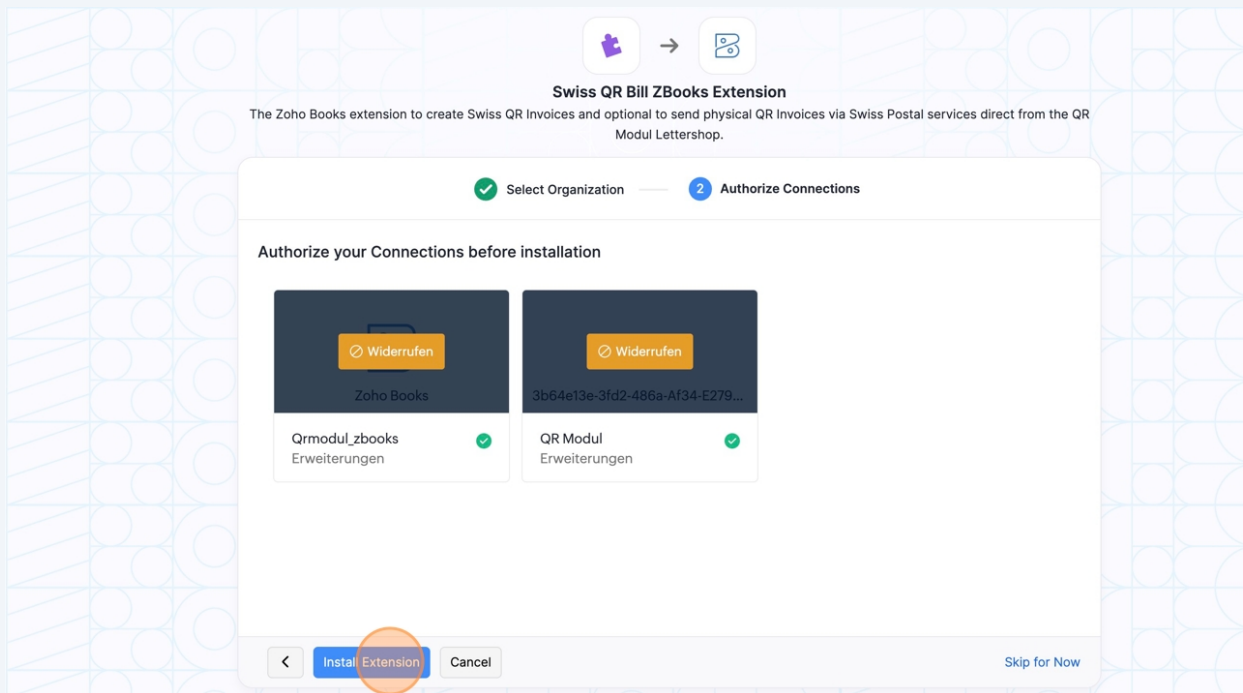
Geben Sie die folgenden Authentifizierungsdaten an, um eine Verbindung zum Service herzustellen.

Client Secret

Client ID

Verbinden Abbrechen

23 Schliessen Sie die Installation ab mit einem Klick auf "Install Extension"



 → 

Swiss QR Bill ZBooks Extension

The Zoho Books extension to create Swiss QR Invoices and optional to send physical QR Invoices via Swiss Postal services direct from the QR Modul Lettershop.

1 Select Organization — 2 **Authorize Connections**

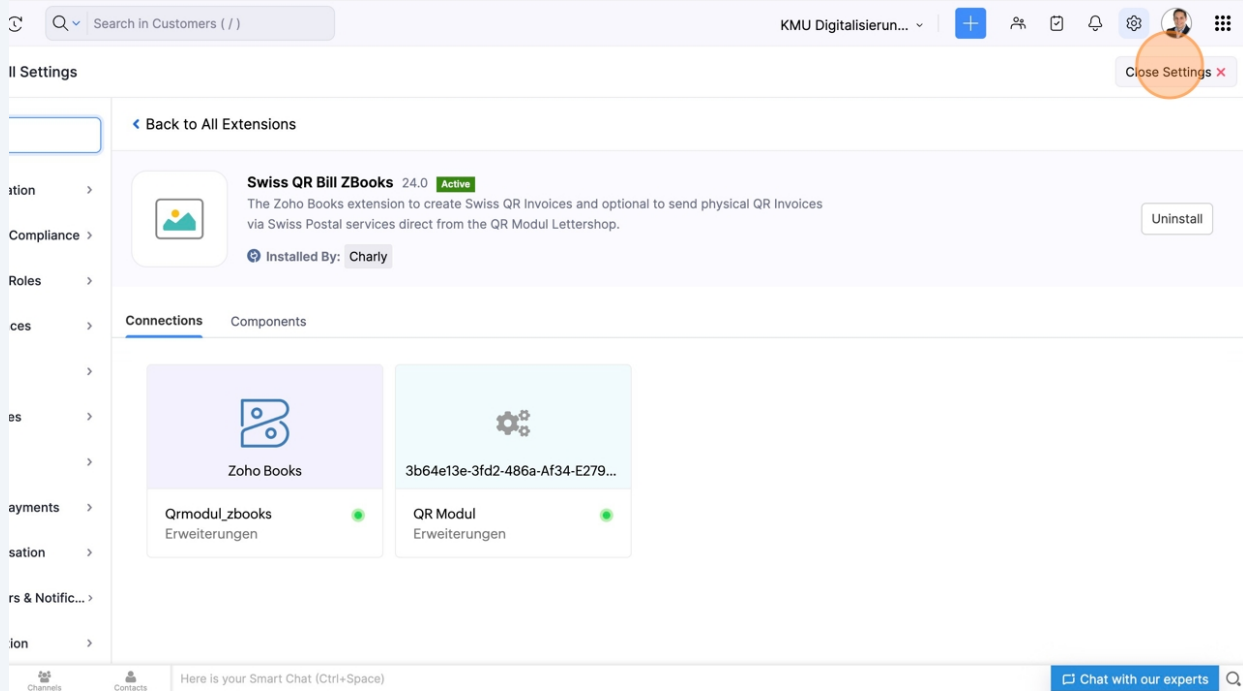
Authorize your Connections before installation

 Zoho Books	 3b64e13e-3fd2-486a-Af34-E279...
Qrmodul_zbooks Erweiterungen 	QR Modul Erweiterungen 

Install Extension Cancel [Skip for Now](#)

24

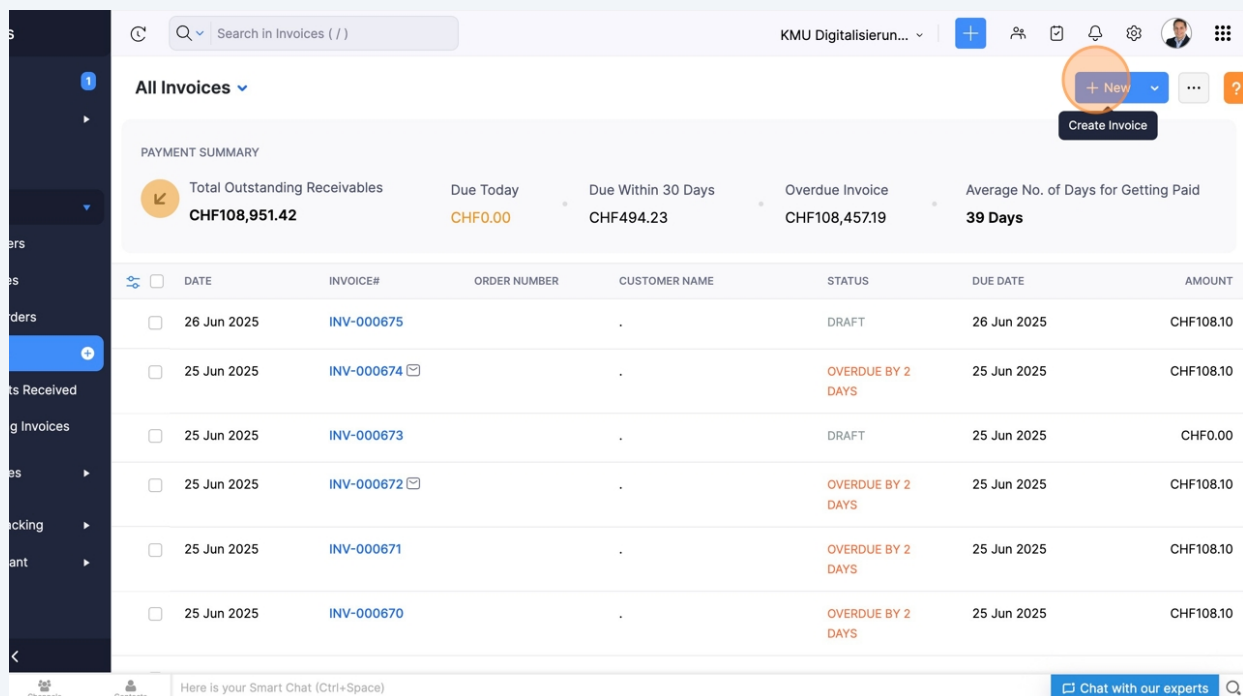
Schliessen Sie das Fenster mit "Close Settings" und kehren Sie zu Zoho Books zurück.



The screenshot shows the Zoho Books 'All Settings' page. The left sidebar contains various settings categories. The main content area displays the 'Swiss QR Bill ZBooks' extension (version 24.0, Active). Below the extension details, there are two tabs: 'Connections' and 'Components'. The 'Connections' tab is active, showing two connected components: 'Zoho Books' and 'QR Modul Erweiterungen'. A red circle highlights the 'Close Settings' button in the top right corner of the settings window.

25

Erstellen Sie nun Ihre Rechnung mit "New" Button.



The screenshot shows the Zoho Books 'All Invoices' page. The top right corner features a '+ New' button, which is circled in red. Below the button is a 'Create Invoice' button. The main content area displays a 'PAYMENT SUMMARY' section with various financial metrics. Below this is a table of invoices.

DATE	INVOICE#	ORDER NUMBER	CUSTOMER NAME	STATUS	DUE DATE	AMOUNT
26 Jun 2025	INV-000675	.	.	DRAFT	26 Jun 2025	CHF108.10
25 Jun 2025	INV-000674	.	.	OVERDUE BY 2 DAYS	25 Jun 2025	CHF108.10
25 Jun 2025	INV-000673	.	.	DRAFT	25 Jun 2025	CHF0.00
25 Jun 2025	INV-000672	.	.	OVERDUE BY 2 DAYS	25 Jun 2025	CHF108.10
25 Jun 2025	INV-000671	.	.	OVERDUE BY 2 DAYS	25 Jun 2025	CHF108.10
25 Jun 2025	INV-000670	.	.	OVERDUE BY 2 DAYS	25 Jun 2025	CHF108.10

26

Kunde auswählen oder erfassen. Diese Daten werden auf der Rechnung und dem QR Zahlteil als Empfänger verwendet.

Books

Home 1

Items

Banking

Sales

Customers

Estimates

Sales Orders

Invoices +

Payments Received

Recurring Invoices

Purchases

Time Tracking

Accountant

Reports

Search in Invoices (/)

KMU Digitalisierun...

New Invoice

Customer Name* Select or add a customer

Invoice#* INV-000676

Order Number

Invoice Date* 27 Jun 2025 **Terms** Due on Receipt **Due Date** 27 Jun 2025

Accounts Receivable Debitorenkonto

Salesperson Charly Suter

Tax Exclusive

Save as Draft Save and Send Cancel

Make Recurring Total Amo Total Quant

Unread Chats Channels Contacts Here is your Smart Chat (Ctrl+Space) Chat with ou

27

Erfassen Sie die Rechnung mit Produkt, Stückzahl und Preis

Books

Home 1

Items

Banking

Sales

Customers

Estimates

Sales Orders

Invoices +

Payments Received

Recurring Invoices

Purchases

Time Tracking

Accountant

Reports

Search in Invoices (/)

KMU Digitalisierun...

Invoice#* INV-000676

Order Number

Invoice Date* 27 Jun 2025 **Terms** Due on Receipt **Due Date** 27 Jun 2025

Accounts Receivable Debitorenkonto

Salesperson Charly Suter

Tax Exclusive

Item Table Scan Item Bulk Actions

ITEM DETAILS	QUANTITY	RATE	TAX	AMOUNT
Type or click to select an item.	1.00	0.00	Select a Tax	0.00

+ Add New Row + Add Items in Bulk

Sub Total 0.00

Save as Draft Save and Send Cancel

Make Recurring Total Amo Total Quant

Unread Chats Channels Contacts Here is your Smart Chat (Ctrl+Space) Chat with ou

28 Wählen Sie den MWST Satz aus

The screenshot shows the 'Create Invoice' screen in a software application. The left sidebar contains navigation options like 'Accounts Receivable', 'Salesperson', 'Tax Exclusive', 'Item Table', 'Add New Row', 'Add Items in Bulk', 'Include 1 Confirmed Sales Orders', 'Include Unbilled Items', '1 unbilled projects', 'Customer Notes', 'Save as Draft', 'Save and Send', and 'Cancel'. The main area displays the 'Item Table' with columns for 'ITEM DETAILS', 'QUANTITY', 'RATE', 'TAX', and 'AMOUNT'. A row for 'Test Produkt' is shown with a quantity of 1.00 and a rate of 100. The 'TAX' column for this row has a dropdown menu open, showing 'Select a Tax'. A red circle highlights this dropdown. Below the table, there are buttons for 'Add New Row' and 'Add Items in Bulk'. To the right of the table, there is a 'Sub Total' section with a value of 0.00, an 'Adjustment' field, and a 'Total (CHF)' section with a value of 0.00. At the bottom right, there is a 'Total Amount: CHF 0.00' and 'Total Quantity: 0'. A 'Make Recurring' button is also visible.

29 Wichtig, klicken Sie nun auf "Save as Draft" und nicht auf Save and Send. Da wir zuerst noch den QR Zahlteil generieren wollen.

The screenshot shows the 'Create Invoice' screen in a software application. The left sidebar contains navigation options like 'Books', 'Home', 'Items', 'Banking', 'Sales', 'Customers', 'Estimates', 'Sales Orders', 'Invoices', 'Payments Received', 'Recurring Invoices', 'Purchases', 'Time Tracking', 'Accountant', and 'Reports'. The main area displays the 'Terms & Conditions' section with a text input field. Below this, there is a 'Select an online payment option to get paid faster' section with radio buttons for 'PayPal', 'Standard', and 'Business'. A checkbox for 'I have received the payment' is also present. The 'Email Communications' section shows a 'Clear Selection' button and an 'Add New' button. Below this, there is a note about 'Additional Fields'. At the bottom, there are buttons for 'Save as Draft', 'Save and Send', and 'Cancel'. A red circle highlights the 'Save as Draft' button. To the right, there is a 'Total Amount' section with a value of 0.00 and 'Total Quantity: 0'. A 'Make Recurring' button is also visible.

30

Klicken Sie dazu auf "Attach QR Modul" und der QR Zahlteil wird generiert und der Rechnung hinzugefügt.

The screenshot shows the 'All Invoices' list on the left with several draft invoices. The main view displays invoice 'INV-000676' with a 'Draft' status. The 'Attach QR Modul' button is highlighted in an orange circle. Below the invoice details, there is a 'Rechnung' (Invoice) preview showing the company logo, name, address, and invoice details. The preview includes the text 'Rechnungsnummer INV-000676' and 'Fälliger Saldo CHF108.10'. The bottom of the preview shows a table with columns: #, Artikel & Beschreibung, Menge, Satz, Steuern %, Steuer, and Betrag.

31

Bestätigen und klicken Sie auf "Proceed"

The screenshot shows the same 'All Invoices' list and invoice preview as in the previous step. A confirmation dialog box is displayed in the center, asking 'Are you sure, you want to perform the custom action?'. The dialog has two buttons: 'Proceed' (highlighted in an orange circle) and 'Cancel'. The background shows the same invoice details and 'Rechnung' preview.

32

Die Rechnung mit dem QR Zahlteil ist versendet. Klicken Sie auf dieses Icon mit der Büroklammer um Ihren QR Zahlteil zu sehen

Search in Invoices (/)

KMU Digitalisierung...

All Invoices

INV-000676

1 File | Comments & History

Edit | Send | Share | PDF/Print | Record Payment | Attach QR Modul

WHAT'S NEXT? Send this invoice to your customer or mark it as Sent. [Send Invoice](#) [Mark As Sent](#)

Rechnung
Rechnungsnummer INV-000676

Fälliger Saldo
CHF108.10

Rechnungsdatum : 27 Jun 2025
Bedingungen : Due on Receipt
Fälligkeitsdatum : 27 Jun 2025

Rechnungsadresse
8001 Zürich
Schweiz

Artikel & Beschreibung Menge Satz Steuern % Steuer Betrag

Here is your Smart Chat (Ctrl+Space) [Chat with our experts](#)

33

Klicken Sie auf "QR INV-000676.pdf" um das PDF zu sehen.

Search in Invoices (/)

KMU Digitalisierung...

All Invoices

INV-000676

1 File | Comments & History

Edit | Send | Share | PDF/Print | Record Payment

WHAT'S NEXT? Send this invoice to your customer or mark it as Sent. [Send Invoice](#) [Mark As Sent](#)

Rechnung
Rechnungsnummer INV-000676

Fälliger Saldo
CHF108.10

Rechnungsdatum : 27 Jun 2025
Bedingungen : Due on Receipt
Fälligkeitsdatum : 27 Jun 2025

Rechnungsadresse
8001 Zürich
Schweiz

Artikel & Beschreibung Menge Satz Steuern % Steuer Betrag

Here is your Smart Chat (Ctrl+Space) [Chat with our experts](#)

Attachments

QR INV-000676.pdf
File Size: 30.9 KB

Display attachments in Customer Portal and emails ☒

[Upload your Files](#)

You can upload a maximum of 10 files, 10MB each

34

Ihr QR Rechnungszahlteil ist generiert und der Rechnungs e-Mail beigefügt.

