# Automation: Stripe Invoicing → Zoho Books via n8n

## Summary

Implementation of an automation that automatically creates and sends a Zoho Books invoice from a Stripe payment event. The workflow handles client search/creation, retrieval of a Zoho item, application of a valid tax (to avoid taxation errors), and finally, sending the invoice.

**Objective:** To automate invoicing based on Stripe payments, without manual intervention, while managing 'existing client / client to be created' cases, taxes, and sending.

## Context & objective

As part of an initial Upwork mission pahse, the client requested a simple and reliable workflow to:
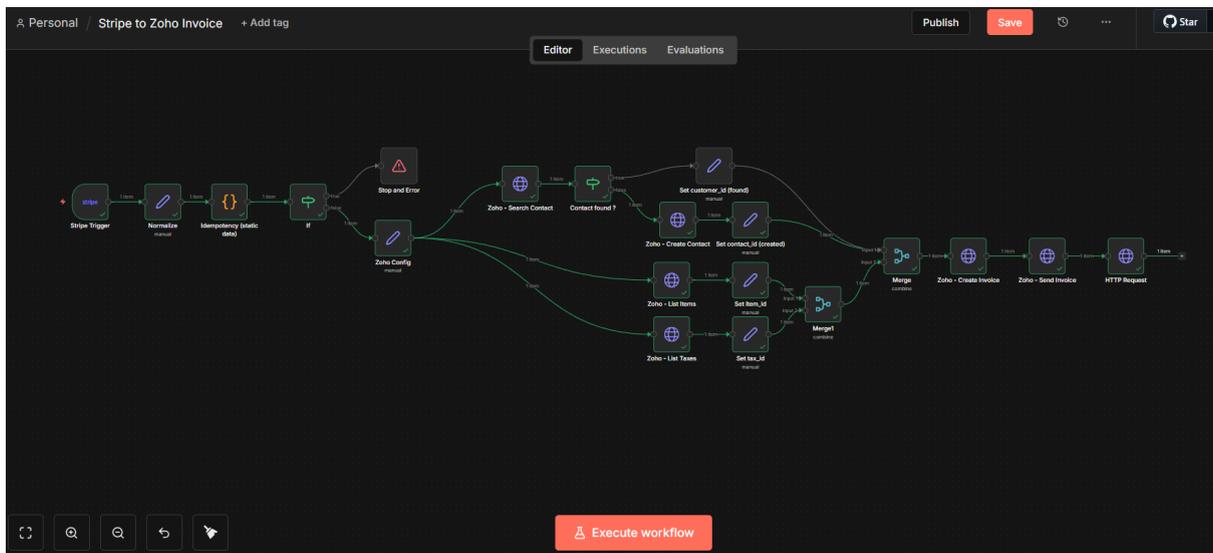
- Receive a Stripe event (successful payment)
- Create a corresponding invoice in Zoho Books
- Automatically send the invoice

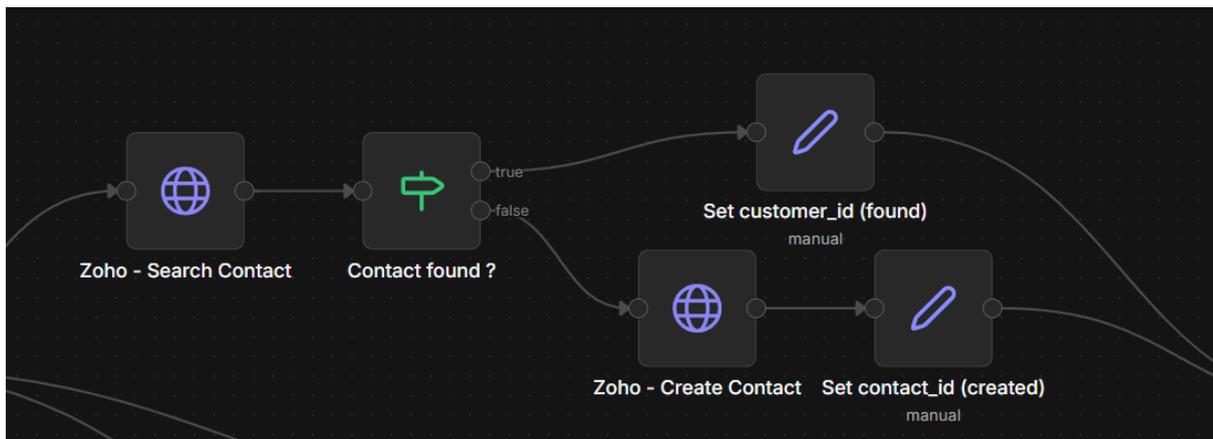## Difficulties Encountered (and Resolved)

- **Sn8n branch synchronization:** Unifying data originating from different paths (client found vs. client created, item retrieval, tax retrieval).
- **Zoho query errors :**
  - JSON format / n8n expressions ("undefined" values, invalid JSON)
  - Zoho constraints on the invoice side (**mandatory tax or exemption**)
- **OAuth Permissions / scopes :** Read/write access to the necessary Zoho resources (invoices, contacts, etc.).accès lecture/écriture aux ressources Zoho nécessaires (factures, contacts, etc.).
- **Reliability :** Ensure consistent and traceable execution (avoid "false positives," missing data, non-propagated fields).

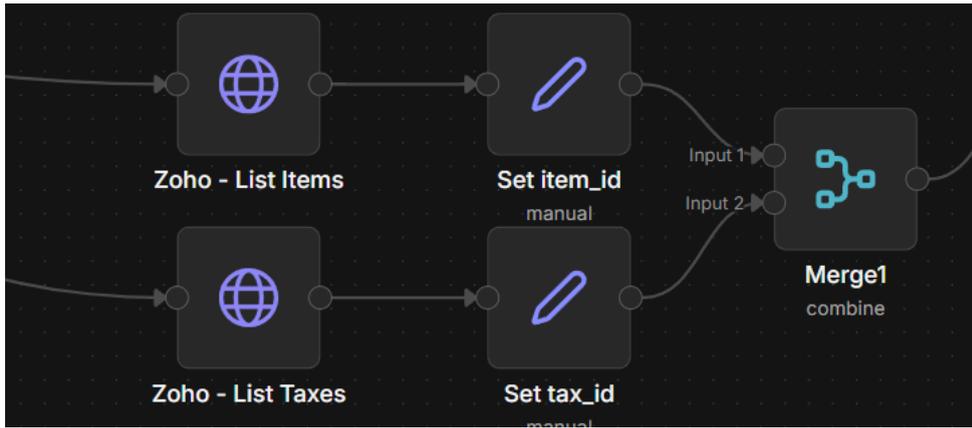## Delivered Solution (End-to-End Functional)
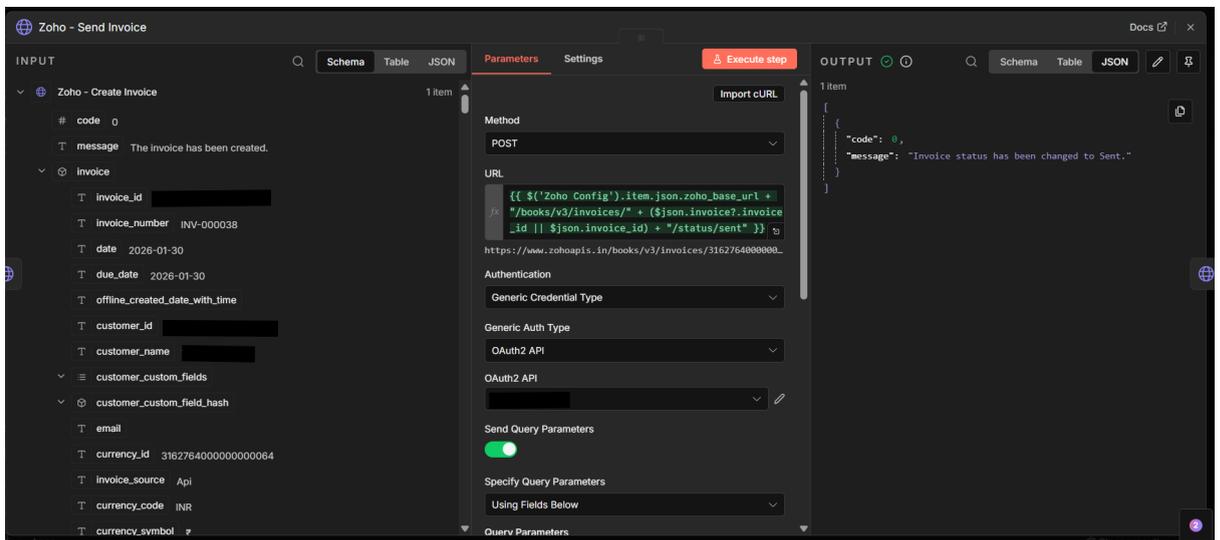
The final workflow :



1. n8n receives the Stripe event
2. Searches for the client in Zoho Books



3. Creates the client if absent
4. Retrieves a valid Zoho item (product/service)
5. Retrieves a valid tax (e.g., 0% if necessary) and applies it to the line item
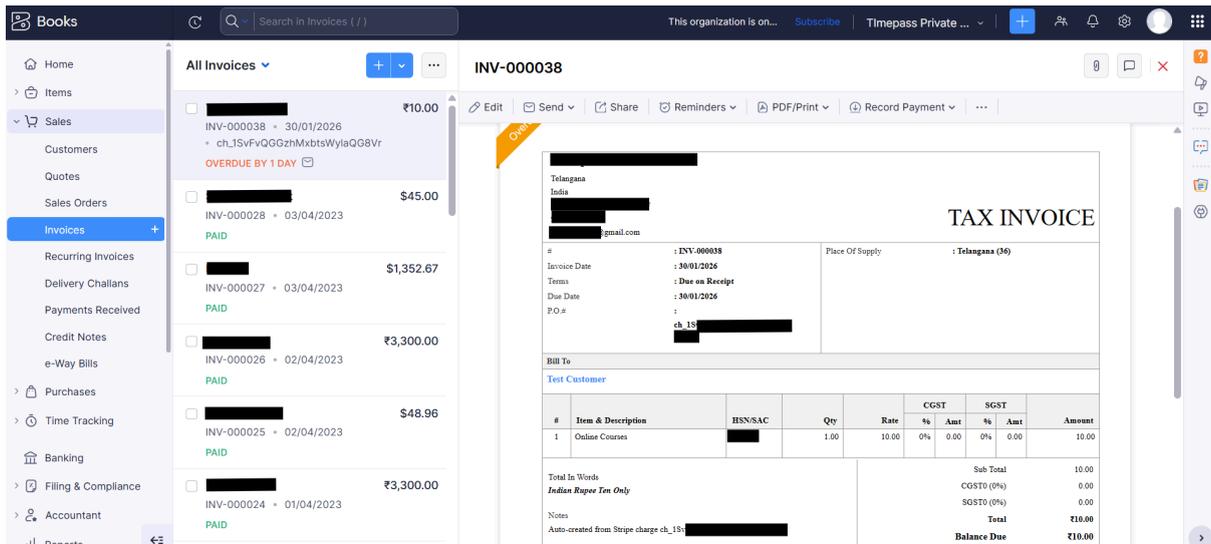
6. Creates the invoice with key information (customer_id, item_id, amount, Stripe reference, notes)
7. Sends the invoice ("Sent status")



## Result (proof)

An invoice was successfully created and automatically sent in Zoho Books.
Example of generated invoice : **INV-000038**, Total **₹10.00**, notes containing the Stripe reference.

INV-000038

## Skills Highlighted

- Automation with **API-Oriented Integration (API-First)** (HTTP, OAuth2, JSON, parameters, response handling)
- n8n workflow modeling: conditional branching, data merging, normalization
- Structured debugging: isolating causes ("undefined", invalid JSON, permissions, tax_id)
- Invoicing integration: contacts, items, taxes, invoices, sending status

## Tools

- n8n (orchestration)
- Zoho Books API (contacts, items, taxes, invoices)
- Stripe (payment events)
- End to end test + validation in the Zoho interface

## Scope - Milestone 1

This first lot covers the implementation and validation of an end-to-end functional "Stripe → Zoho Books" n8n workflow: reception of a Stripe event, client search in Zoho Books (client creation if absent), retrieval of a valid item and tax, creation of the invoice with essential fields (customer_id, item_id, amount, tax_id, Stripe reference, and notes), then sending the invoice ("Sent" status) via Zoho Books. The lot includes the necessary adjustments for proper functioning (data normalization, expression/JSON corrections, handling of 'existing client / client to be created' cases) and proof of result (invoice generated in Zoho + PDF). However, not included at this stage are: advanced multi-product mapping, complex tax rules by country/state, management of refunds/credit notes, payment reconciliation, full PDF template customization, or industrialization/monitoring (alerting, dashboards, incident recovery) beyond basic checks.