



# Zoho Inventory

## What is Zoho Inventory?

Zoho Inventory is an inventory management software application that lets you manage all your orders. You can manage your contacts, bills, and reports, and generate invoices easily.

## How to connect your Zoho Inventory account to Zoho Flow

1. Select the required trigger or action. If you select a trigger, click **Next**.
2. If there are no other Zoho Inventory connections in your account, click **Connect**. Otherwise, click **New connection**. Alternatively, you can create a new connection by navigating to **Settings**, then **Connections**. Click **Create connection** and choose **Zoho Inventory**.
3. Enter a **Connection name** and click **Authorize**.
4. Click **Accept** to allow Zoho Flow to access your Zoho Inventory account.

## API documentation

If you experience any Zoho Inventory-related errors in your flows or if you wish to learn more about the Zoho Inventory API, the API documentation can be found [here](#).

[Learn how to fix app-specific errors using API documentation](#)

## How to migrate to the latest version?

To ensure a smooth transition to the latest version, we strongly recommend you to follow these steps:

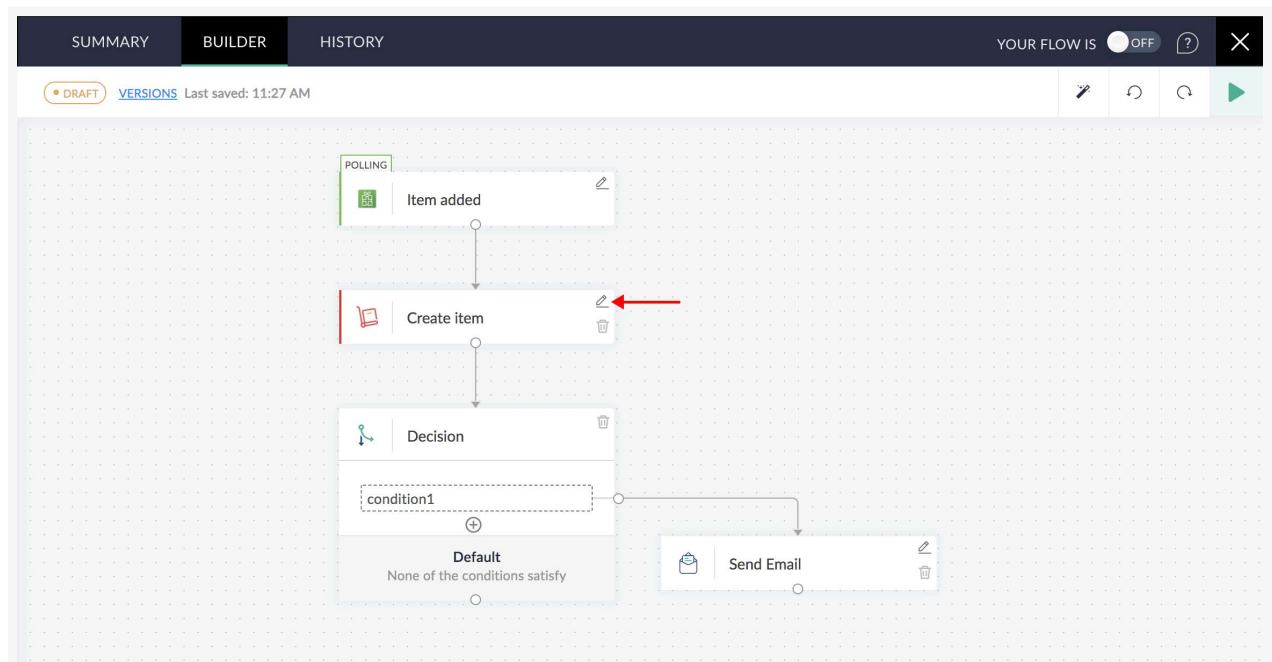
1. Switch off the flows that include Zoho Inventory triggers and actions.
2. Create a copy of the flows by clicking the **Create copy** button. You can use the original flows as a reference in case something goes wrong.



3. Create a new Zoho Inventory connection from **Settings > Connections > Create Connection > Zoho Inventory**.

**Note:** The new connection will utilize the latest **OAuth V2** authentication scheme. Keep your previous Zoho Inventory connections undisturbed until you've ensured that all your reconfigured triggers and actions that use them are working fine.

4. In the copied flows, reconfigure the Zoho Inventory trigger and actions by clicking the **Edit** button. Use the newly created connection while reconfiguring.



5. Even though most of the data mappings will be unaffected, we strongly recommend that you remove the existing mapping and insert variables to the desired fields again.

**Note:** Because you are working on a copy of your flow, you can always refer to the original setup to verify if you have mapped the fields correctly.

6. Switch on the new flows.

## Major changes from the previous version

1. **Authentication**

The authentication scheme has changed from API based to **OAuth V2**.

2. **Separate actions for Customer and Vendor**

*Create contact, Fetch contact, and Update contact* is now separated into *Create customer, Fetch customer, Update customer, Create vendor, Fetch vendor, and Update vendor*.

3. **Add address action**

You can now add new shipping and billing addresses separately for contacts.

4. **Send actions added**

*Send invoice, Send credit note, Send sales order, and Send purchase order* actions added.

5. **Status change actions added**

Mark shipment as delivered action added.

6. **Using custom values in Fetch actions**

Fetch actions now allow you to search for records using unique custom fields associated with records.

Let's take an example of fetching an invoice using the value of one of its custom fields.

1. In the *Fetch invoice* action, select **Use a custom value** in the **Search by** dropdown menu.

Search by \*

Use a Custom Value

Custom Value for Search by \*

Input must match one of the options listed above.

cf\_sample\_auto\_generate\_field

Search value \*

\${trigger.sample\_value}

2. **Custom value for Search by** is the key that is required to identify which custom field you are referring to. Enter the value in the field provided.
3. Suppose you want to search for an invoice using the value of *Custom field 2*. First, log in to Zoho Inventory. Navigate to **Preferences > Invoices > Field customization > Select field**. Copy the

value of **API Field Name** and paste here.

The screenshot shows the Zoho Inventory 'Edit Custom Field - Invoice' configuration page. On the left is a dark sidebar with a 'Settings' menu where 'Preferences' is selected. The main area is divided into two panels: 'Preferences' and 'Edit Custom Field - Invoice'. The 'Edit Custom Field' panel contains the following fields:

- Label Name \***: A text input field containing 'Sample auto generate field'.
- Data Type \***: A dropdown menu set to 'Auto-Generate Number' with a help icon.
- Remaining Fields**: A label indicating '0' remaining fields.
- Help Text**: A text area with placeholder text: 'Enter some text to help users understand the purpose of this custom field.'
- Prefix**: A text input field containing 'ZF-'.
- Starting Number \***: A text input field containing '10001'.
- Suffix**: An empty text input field.
- Is Mandatory**: Radio buttons for 'Yes' and 'No', with 'No' selected.
- Show in all PDF**: Radio buttons for 'Yes' and 'No', with 'No' selected.
- Preview**: A section showing a visual representation of the field. It includes a label 'Sample auto generate field' and a value field displaying 'ZF-10001'.
- API Field Name**: A text input field containing the code 'cf\_sample\_auto\_generate\_field'. Below it, a note states: 'Use this placeholder when referring to this custom field in an API call.'

4. Now, you can either map a value from the trigger or enter a value yourself in the **Search value** field to search for an invoice associated with the provided value in the specified custom field.

<https://help.zoho.com/portal/en/kb/flow/user-guide/app-specific-documentation/articles/zoho-inventory-help>