Zoho Books

What is Zoho Books?

Zoho Books is online accounting software to manage your accounting, inventory and to file your GST returns. You can manage your contacts, set up rules to categorize banking transactions, make informed decisions based on accurate reports, and keep track of every expense.

How to connect your Zoho Books 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 Books 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 Books** .
3. Enter a Connection name and click **Authorize**.
4. Click **Accept** to allow Zoho Flow to access your Zoho Books account.

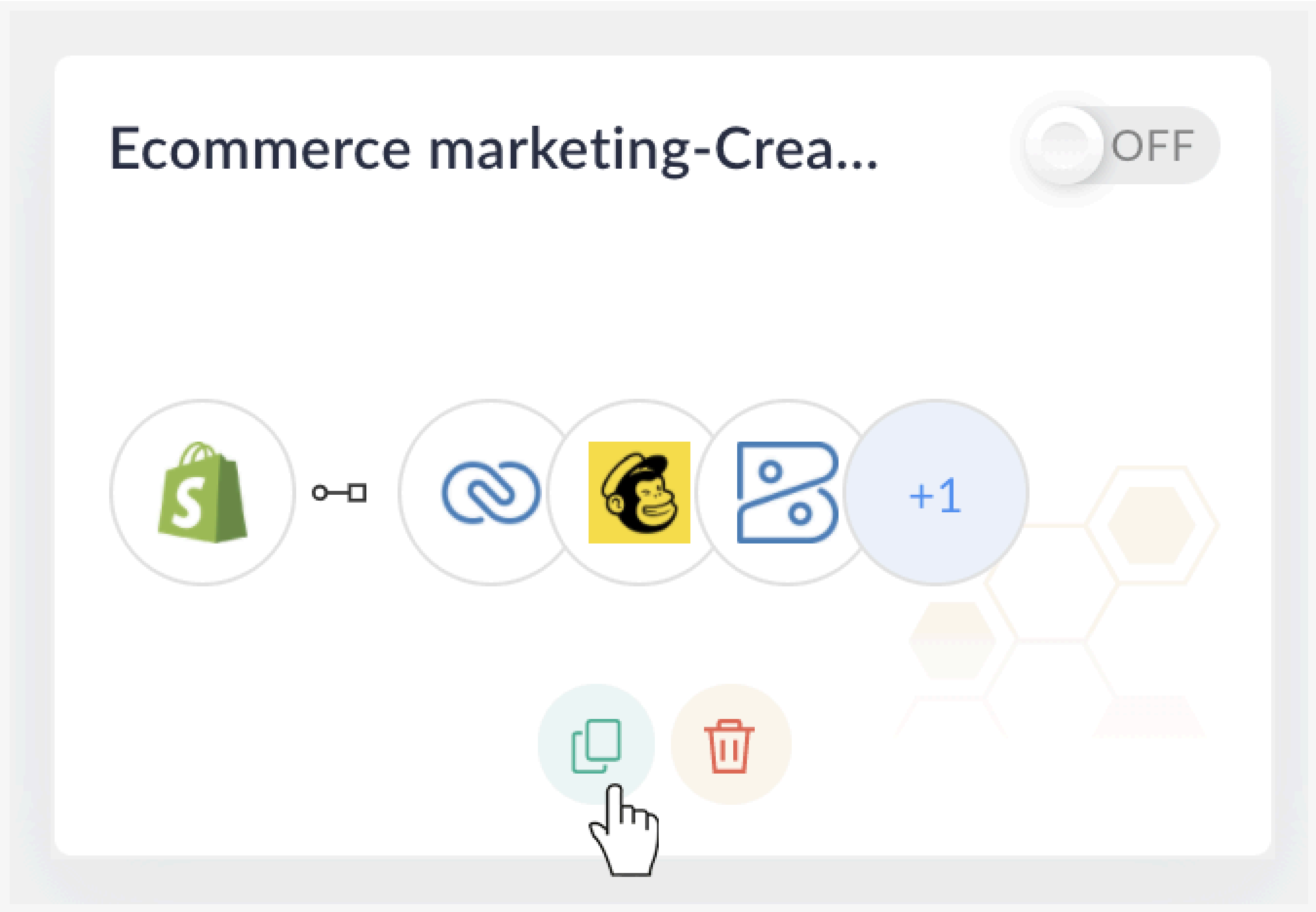
API documentation

If you experience any Zoho Books-related errors in your flows or if you wish to learn more about the Zoho Books 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 Books triggers and actions.
2. Create a copy of the flows by clicking the **Create copy** button.
   You could use the original flows as a reference in case something goes wrong.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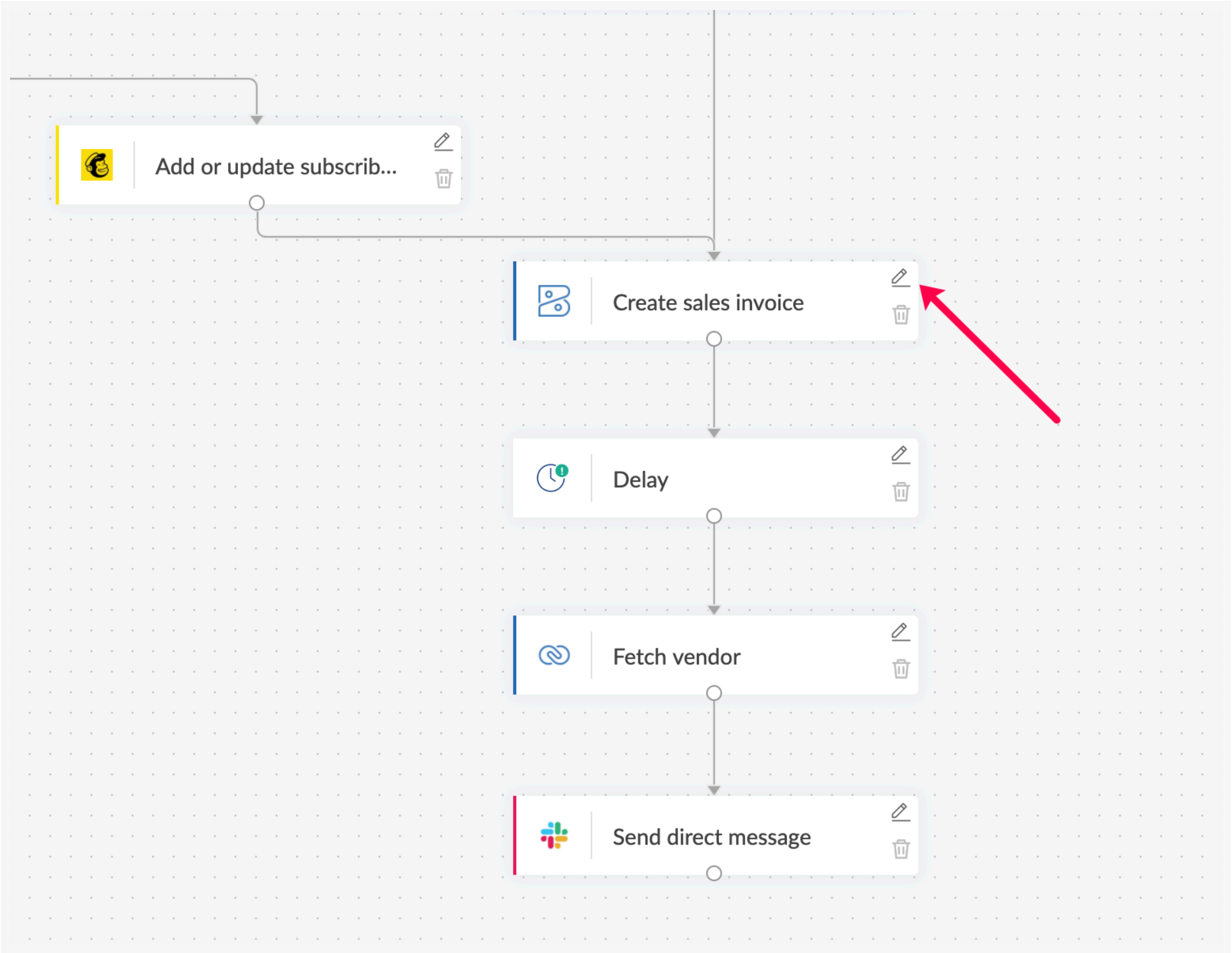
3. In the copied flows, reconfigure the Zoho Books trigger and actions by clicking on the **Edit** button.



4. 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: Since 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.

5. Switch on the new flows.

Major changes from the previous version

1. **Authentication**

   Previous version

   The authentication scheme was API key based.

   Current version

The authentication scheme is OAuth V2.

2. **Fetch actions**

Fetch actions like *Fetch item, Fetch invoice, and Fetch estimate* now provide you a dropdown list to select the field you wish to use to search for a record. For example, in the case of *Fetch invoice,*

Previous version

There were three separate *Fetch Invoice* actions - *Fetch invoice by ID, Fetch invoice by invoice number, and Fetch invoice by CRM Potential ID.*

Current version

You can fetch the details of an existing invoice by ID, invoice number or CRM potential ID from the drop-down list in the *Fetch invoice* action.

3. **Separate Contact modules for Customer and Vendor**

Previous version

Create contact, Fetch contact and Update contact.

Current version

You have separate actions for Customer contacts and Vendor contacts.

Customer: *Create customer, Fetch customer and Update customer.*

Vendor: *Create vendor, Fetch vendor and Update vendor.*

4. **Fetch salesperson action dropped**

Due to technical difficulties, *Fetch salesperson* action was dropped, and will no longer be available.