



Zoho
Inventory

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INVENTORY

◆ Items

The Items module gives you complete visibility over details like stock on hand, committed stock, and items available for sale. These stock details are automatically updated when orders are invoiced or fulfilled based on your preferred mode of stock tracking.

◆ Item Groups

An item group is a collection of products that share similar attributes like color, description, features, edition, or usage. Item groups can also be formed based on a similarity in price or the markets in which they are sold. For example, if an iPhone is an item group, then items in that group could be iPhone 13, iPhone 14, and iPhone 14 Pro.

◆ Composite Items

A composite item is a single commodity that is composed of two or more items and/or services. You can create customized bundles and sell them at custom rates.

◆ Inventory Adjustments

You can adjust your inventory for any mismatch with the actual stock. Zoho Inventory offers quantity and value adjustments for inventory-tracked items, including serial-tracked and batch-tracked items. Users can customize and manage adjustment reasons, too.

◆ Price Lists

Price lists allow you to customize item prices for specific customers or transactions. It can be used to offer discounts to various customers, businesses operating from specific countries, and vendors. It can be applied to a sales order or even for individual items.

◆ **Serial Number Tracking**

With serial number tracking, track individual units of an item from their creation to their point of sale and beyond. Each unit will possess a unique identification code which will help you determine which unit was sold and to whom.

◆ **Batch or Expiry Tracking**

Batch or expiry tracking allows you to group and monitor a set of stock items that share similar properties. With batch tracking, you can track expiration dates and trace defective items back to their corresponding batch.

◆ **Barcode Generation and Scanning**

Zoho Inventory supports barcode generation and scanning. Generate barcodes for your inventory items and scan them to add line items and serial numbers automatically to transactions such as invoices and bills.

WAREHOUSING

◆ **Multi Location Management**

You can add multiple warehouses, which represent the physical storage buildings where you keep stock. While creating orders, you can choose the warehouse you want to use to dispatch (sell) from or receive (purchase) stock.

◆ **Transfer Orders**

Create transfer orders to keep track of all inventory transfers performed from one warehouse to another. You can also use the In-transit option for orders you want to receive later.

◆ **Warehouse Restrictions**

Assign and set up user-level warehouse restrictions.. This allows you to

control authority and accessibility by keeping the details of restricted warehouses hidden from select staff throughout the application.

◆ **Picklists**

Create picklists for your orders and assign a warehouse picker to communicate the list of items and its quantities to pick from a specific warehouse to fulfill orders.



ORDER MANAGEMENT

◆ **Sales Order**

Create and edit sales orders, or integrate sales channels to fetch sales orders automatically.

◆ **Custom Status**

Keep track of the different stages of your order through status updates. Choose from the default updates or compose custom statuses.

◆ **Order Filtering**

Manage your sales orders with predefined filters such as date, status of order, status of approval, or create custom views for better tracking.

◆ **Multichannel Sales**

Sell your items on multiple channels. Streamline orders and automate stock updates across multiple sales channels like Shopify, Amazon, and more.

◆ **Packages**

Create packages and generate packing slips. Manage the movement of packages as they pass through multiple stages like packed, shipped, or delivered.

◆ Package Geometry

Visually simulate the optimal arrangement of goods inside the boxes before packing them. It helps to minimize wasted space within the boxes.

◆ Sales Returns

Manage your returns by creating sales returns and issuing credits or providing refunds.

◆ Dropshipment

Create dropship purchase orders and track them without worrying about inventory costs.

◆ Backorders

Don't worry about going out of stock. Create a backorder with a few clicks, restock and fulfill the orders.

◆ Invoices

Convert an order into an invoice in seconds. Customize your invoice template to suit your business.

◆ Multi-Currency Handling

You can create transactions for your customers in any currency. This streamlines the invoicing process for international transactions and ensures the correct amounts are recorded in the appropriate currencies.

◆ Email Invoices

Email invoices to your clients directly from Zoho Inventory with just a click

◆ Retainer Invoices

Retainer invoices enable companies to collect advance payments from customers. They facilitate the recording of these invoices, the receipt of payments, the allocation of retainer amounts to specific invoices, and the process of issuing refunds when necessary.

◆ **Payment received**

Record payments received from customers or integrate with payment gateways to collect payments online.

◆ **Delivery Challans (for India)**

Delivery challans are documents created when goods are transferred from one place to another, which may or may not involve sales. Partial returns of goods can also be recorded in the delivery challan.

◆ **GST Settings (for India)**

Users can set default tax preferences for intrastate and interstate transactions, as well as edit tax rates for individual items that do not fall under the default tax rate. Contacts can be classified into four categories, and their corresponding GSTIN, HSN, and SAC codes can be added.

◆ **E-way Bills**

An e-way bill is an electronically-generated document necessary for the movement of goods within or outside the states of India. In Zoho Inventory, you can create e-way bills, sync them from the EWB portal, cancel them, and restore transactions.



PURCHASE

◆ **Purchase Order**

Create, edit, and send purchase orders to your vendors directly from Zoho Inventory.

◆ **Status**

Managing your purchase orders is effortless as you can see the different statuses like billed, partially received, and received.

◆ Bills

Create or convert a purchase order into a bill and track it until it's paid. This ensures timely vendor payments.

◆ Purchase Receives

Creating purchase receives allows you to keep track of items you receive from vendors and raise bills only for the items you have received. Advanced inventory tracking can be enabled for purchase receives, which allows you to add serial numbers or batch numbers for the items as you receive them at your location.

◆ Payments made

Stay on top of your payables using the Payments Made module. Record the payments made to your vendor or any advanced payments.



INTEGRATIONS

◆ Shipping and Tracking

Integrate with shipment providers worldwide to generate shipping labels for your orders, or track your shipments using AfterShip tracking, which supports over 40 shipping carriers worldwide. You can get real-time shipping rates, ship goods to customers, and track shipments. You can also customize shipment templates and download shipping labels.

◆ Marketplaces and Shopping Carts

Sell on multiple ecommerce platforms and manage your orders, inventory, and shipping under one roof. Zoho Inventory offers an array of sales channels and ecommerce integrations.

◆ Accounting (India)

Automatically sync your accounting information with Tally or Zoho

Books to update your information without a hassle. Eliminate manual data export and import.

◆ **Accounting (Global)**

Automatically sync your accounting information with Zoho Books to update your information without a hassle. Eliminate manual data export and import.

◆ **EDI**

Manage your third-party logistics using EDI integrations. Integrate with EDI providers and send orders and invoices to your 3PL partners right from Zoho Inventory.

◆ **SMS Integration**

Send out invoice and payment notifications through SMS so you never miss out on payments from your customers.

◆ **Online Payments**

Integrate with online payment gateways to accept payments right from Zoho Inventory.

Zoho Inventory tightly integrates with other Zoho applications to manage different aspects of your business, from Zoho CRM and Zoho Analytics, to Zoho Cliq, and more.



REPORTS

Zoho Inventory provides insightful reports that can help you keep track of your stock flow, cash flow, and other inventory activities.

◆ **Inventory Reports**

Inventory reports are exclusively generated for the items in your organization. We offer a multitude of inventory reports like the Product

Sales Report, Product Purchase Report, Inventory Details, and FIFO Cost Lot Tracking Report.

◆ Sales Reports

Access reports associated with the sales you have recorded and managed in Zoho Inventory. Analyze your sales orders, invoices, customers, and payments to plan your sales strategies.

◆ Receivables

Run various reports like customer balances, invoice histories, and receivable summaries to get an overview of your receivables.

◆ Purchase Reports

Access reports associated with the purchases you have recorded and managed in Zoho Inventory. Analyze your purchases to plan your restocking workflows efficiently.

◆ Activity

Access the reports associated with system emails and logs that the product maintains. This helps you track and supervise your staff and operations.

◆ Payments Received

Access reports associated with payments received and refunds. It helps you keep track of your payments and products, along with their refund history.

◆ Payables

This section gives you insights into your bills, purchases made from various vendors, payables, and payments made on these purchases. This helps you analyze the procurement trends of your organization better.

◆ **Advanced Analytics**

Create highly customizable reports and dashboards to visualize and track key financial metrics from Zoho Inventory data. With advanced analytics, get access to 75+ predefined reports and dashboards. Users can also create their own reports based on Zoho Inventory data or from any other data sources and popular business applications.



OTHER HANDY FEATURES

◆ **Users and Roles**

Create and assign custom roles to users from various departments allowing them to access Zoho Inventory from any location.

◆ **Templates**

Create custom templates of your choice or choose and edit templates from our gallery. Zoho Inventory allows you to create professional templates for all your purchase and sales transactions.

◆ **Reporting Tags**

Reporting tags are labels with different values, which can be associated with entities such as customers, vendors, items, orders, invoices, and credits in Zoho Inventory. These tags can then be used to filter reports, giving you categorized insights into your business.

◆ **Automation**

The Automation module allows you to get more out of Zoho Inventory. You can create custom rules for different modules in Zoho Inventory based on which appropriate actions will be triggered.

◆ **Connections**

Using Connections, you can connect Zoho Inventory with third-party services to access authenticated data.

◆ **Web Tabs**

Web tabs are similar to browser tabs which allow you to embed the URLs of other applications and open their webpages from within Zoho Inventory. Depending on the website, you can find, then embed or publish URLs to create web tabs within Zoho Inventory.

◆ **Customer Portal**

Customers can view their sales orders, pay for invoices, check the status of their shipments, update their information, and much more with this self-service portal.

◆ **Vendor portal**

Provide vendors the flexibility to manage purchase orders, view payments, upload invoices to be converted to bills, and more.

◆ **Mobile Apps**

Keep track of your inventory across multiple locations, get real-time updates on your orders, provide timely shipment updates to your customers, and much more with our mobile application.

◆ **Email and Field Updates**

Keep your customers informed during every step of their order cycle. Notify them of order status, or any field updates. You can also customize email templates for different modules.

◆ **Custom Functions**

Zoho Inventory's custom functions provide a way to automate your business processes by writing small pieces of code with Deluge script. Give special discounts to your customers on their invoices, and add late fees when payments are past due with custom functions.

◆ **Webhooks**

Webhooks send instant web notifications to third-party websites

whenever an event occurs in Zoho Inventory. Users can set up advanced filters, customize email alerts, and schedule when the workflow should be triggered.



Visit us

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