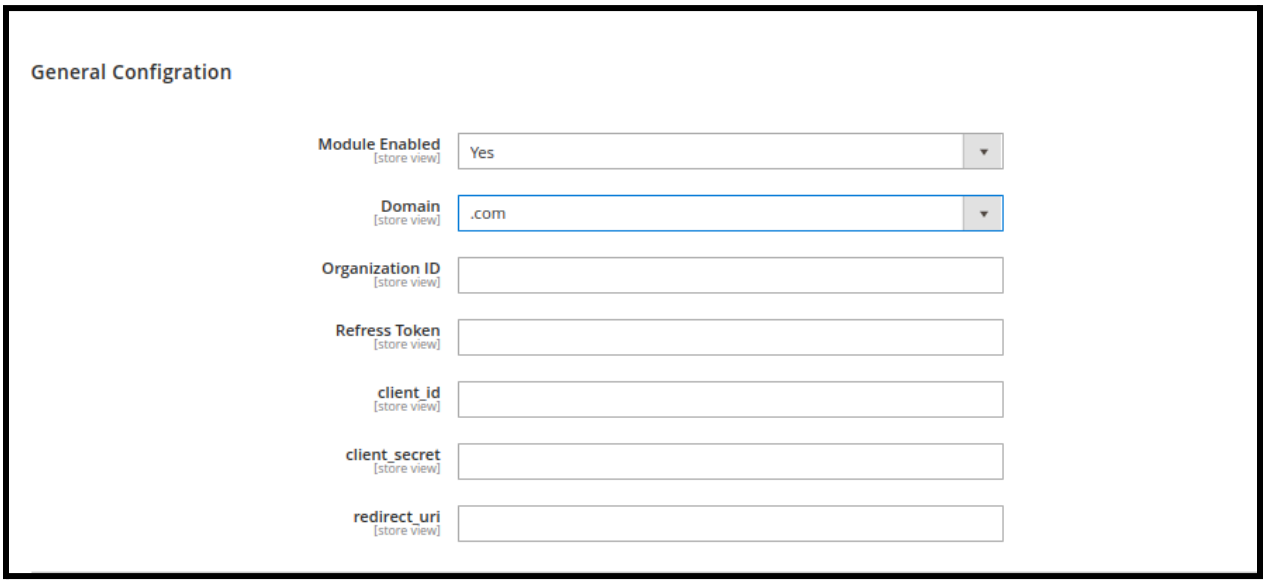


Zoho Integration

Configure extension settings from your Magento admin panel through:
You can configure fields as explained below.

- **Stores ➜ Configuration ➜ Elsnertech Zoho Integration ➜ Settings: General Configuration**



➔ **Module Enabled :** Select Yes/No to enable this extension.

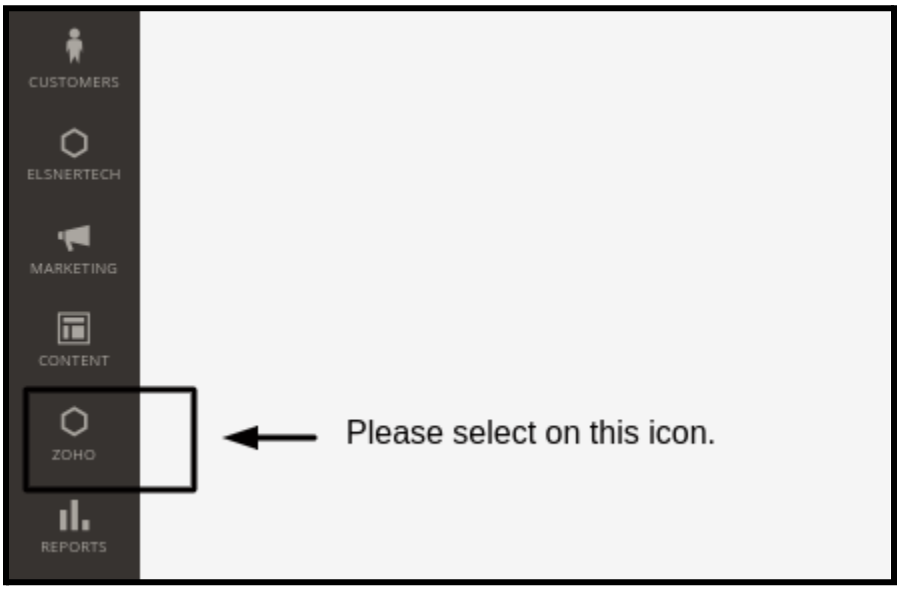
➔ **Domain :** Add your Zoho Inventory Account Domain.

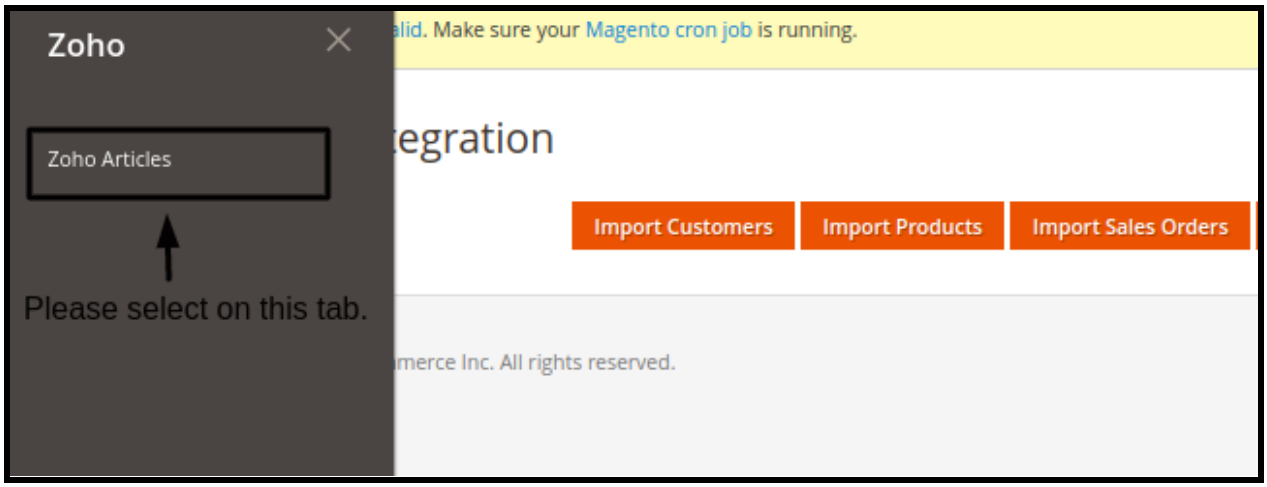
➔ **Organization ID, Refresh Token, Client Id, Client Secret, Redirect URL** All These Fields You can Generate Via Below URL. Please follow all Steps & You will get all Informations.
https://www.zoho.com/inventory/api/v1/introduction/#organization-id

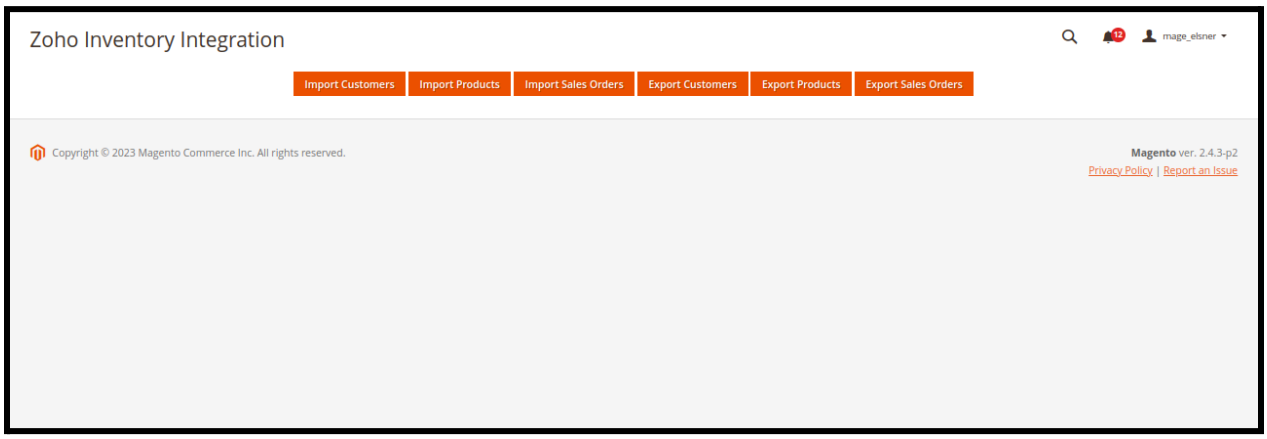
- **There are two different methods to Importing & Exporting.**
  1). Through the Import and Export Buttons Panel.
  2). Through WebHooks.

-:- Method 1) : Through Import and Export Buttons Panel -:-

- **Once You added all information and Select Module Enable to YES Then please follow all steps as below Mentioned in below images.**







- **Now If you want Importing Customers, Products & Sales Orders then click on Import Buttons as mentioned below image.**



➔ **Import Customers :-** When you click on this button then you will get Customers From your Zoho account to Your Magento admin panel.

➔ **Import Products :-** When you click on this button then you will get Products From your Zoho account to Your Magento admin panel.
In Zoho Inventory Account Product type is different then Magento.

Zoho Product Types	Magento Product Types
Items	Simple Products
Items Service	VIrtual Products
Composite Items	Grouped Products
Item Groups	Configurable Products

➔ **Import Sales Orders :-** When you click on this button then you will get All sales orders flow From your Zoho account to Your Magento admin panel.
In Sales Orders Magento Follows below flow.

Orders -> Invoices -> Shipments -> Credit Memos.

- **Now If you want Exporting Customers, Products & Sales Orders then click on Export Buttons as mentioned below image.**



➔ **Export Customers :-** When you click on this button then you will get Customers From your Magento admin panel to Your Zoho account.

➔ **Export Products :-** When you click on this button then you will get Products From your Magento admin panel to Your Zoho account.

➔ **Export Sales Orders :-** When you click on this button then you will get Sales Orders From your Magento admin panel to Your Zoho account.
In Sales Orders Zoho Follows below flow.

Sales Orders -> Packages -> Shipments -> Delivery Challans -> Invoices -> Payment Received -> Sales Returns -> Credit Notes.

-:- Method 2) : Through WebHooks -:-

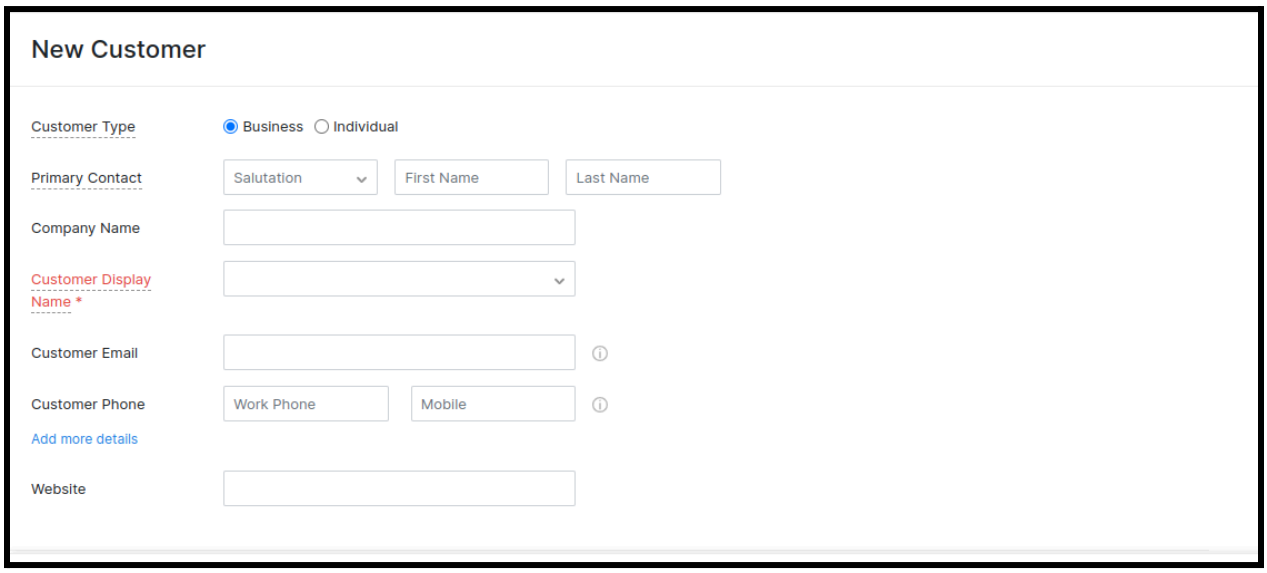
Configure WebHooks settings from your Zoho Inventory admin panel through:
You can configure fields as explained below.

This Method Fully based on Automation, So you don’t need to do anything in Magento Admin panel But when you are importing Zoho To Magento.

- ➔ **Zoho Admin Panel -> Settings -> Automations.**
- ➔ **Now Please Follow below steps as mentioned in Link.** **https://www.zoho.com/in/inventory/help/settings/automation.html#:~:text=To%20set%20up%20a%20webhook,page%2C%20select%20the%20Webhook%20tab.**
- ➔ **In WebHooks When you Create Customers, Products & Sales Orders then magento automatically creates these things But if you follow all Creating WebHooks Steps.**

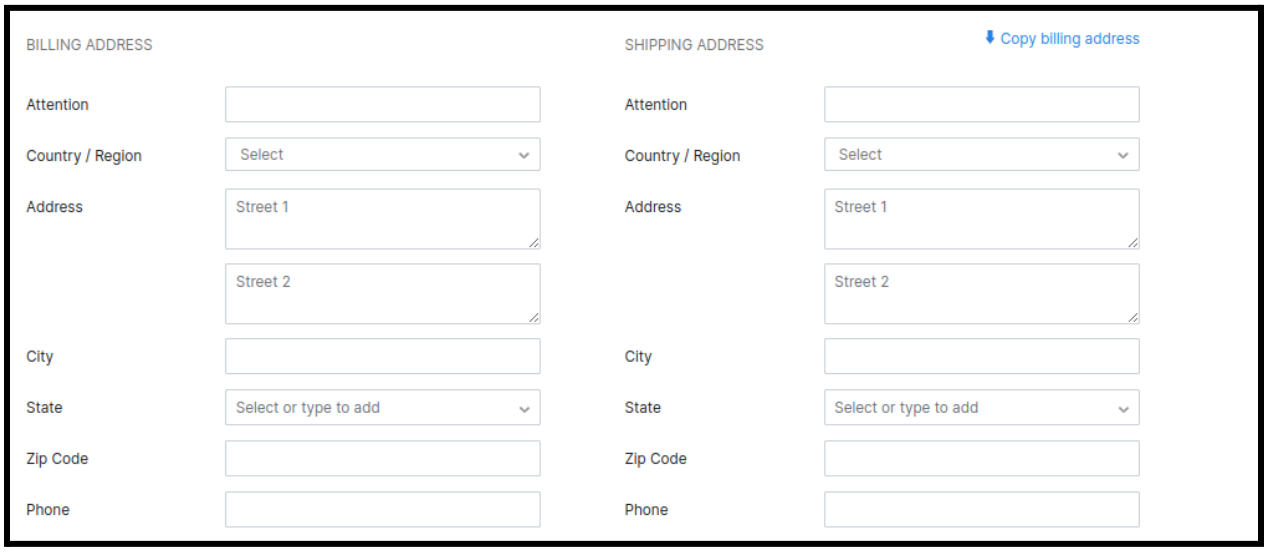
-:- Important things to must be follow -:-
A) . Create Customer

1). This feature is available for both methods WebHooks (Automation) & API.
2). You can Create, Update and Delete Customers.



3). You can sync only below details From Zoho To Magento.
-> First Name, Last Name, Customer Email

4). If you want to add Customers from Zoho To Magento then In Your Zoho account Customer **Email Address** field is required.

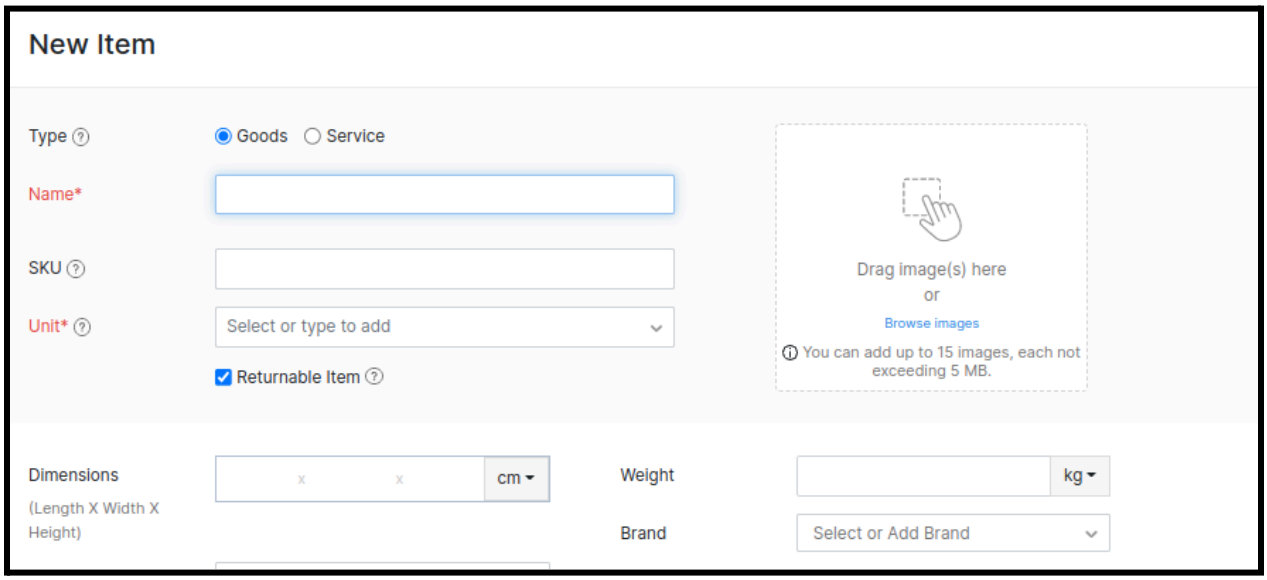


5). To create Customer Billing Address & Shipping Address **State, Country, City, Zip Code, Telephone** are required to import in magento.

6). After Syncing Customer 'Zoho To Magento' then Customer got **'Forgot & Reset Password' Email**. So, Customers can add their own Password on Magento site Account.

B) . Items (Simple Products)

1). This feature is available for both methods WebHooks (Automation) & API.
2). You can Create, Update and Delete Items.



3). You can only sync the below details From Zoho To Magento.

=> In **"Type",**

-> "Goods" = Simple Products in Magento

-> "Service" = Virtual Products in Magento

=> Name, Description.

=> in **"SKU",**

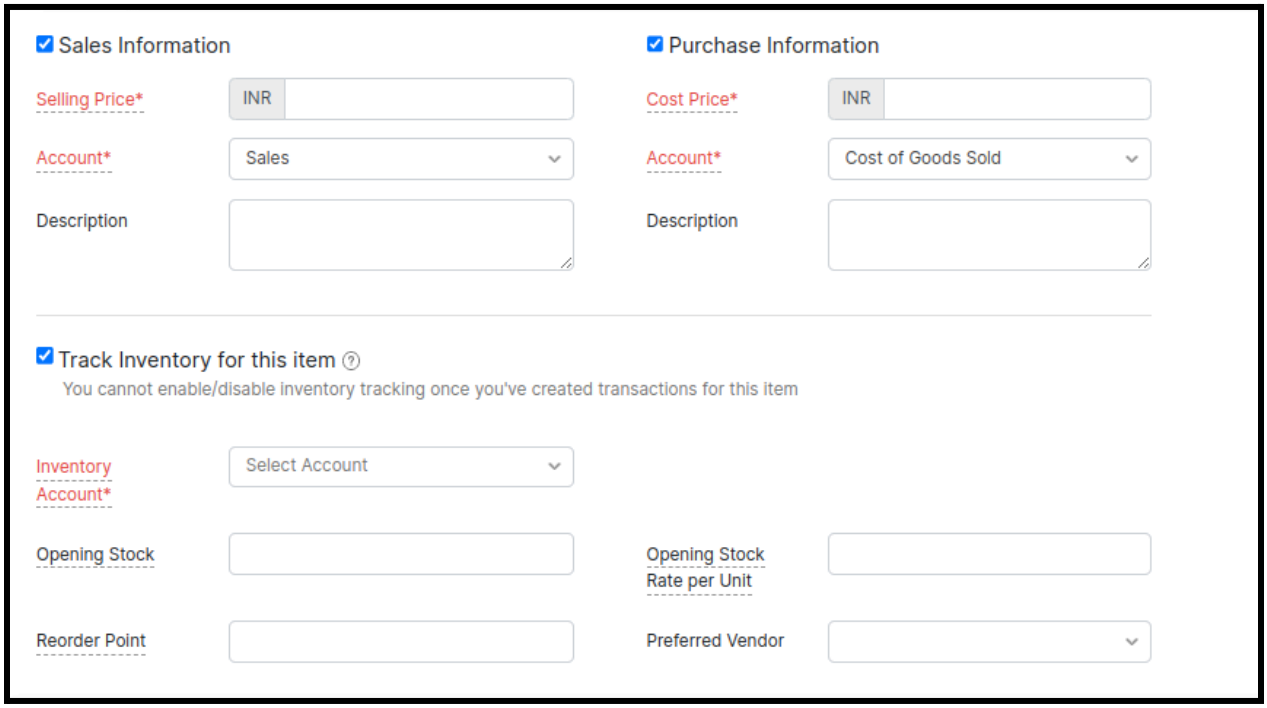
-> If you want to add Products then Zoho's SKU field is required, Otherwise magento can not able to create it.

-> NOTE :- This field value is must unique then any other Products & Duplication are not allowed.

=> in **“Weight”,**

-> You can add weight as you want.

-> Limitation :- Unit Conversion is not possible for Zoho to Magento, But we added it's values are the same in zoho to magento.



=> In **"Sales Information",**

-> You can add Selling **Price/Total Amount** Of Item.

-> Limitation :- Unit Conversion is not possible for Zoho to Magento, But we added it's values are the same in zoho to magento.

=> In **"Track Inventory",**

-> You must **Enable** **"Purchase Information"** otherwise your **"Track Inventory"** Option not showing.

-> After Enabled it, You should select **"Inventory Account"** value as **"Finished Goods"** from it's dropdown.

-> Now You can add the **"Opening Stock"** value.

-> Limitation :- When We add Quantity/Stock it works like below Example.

If you add 2.3 value then it converts to 2.

But you add 2.5 then it converts to 3.

2.0 to 2.4 ==> 2

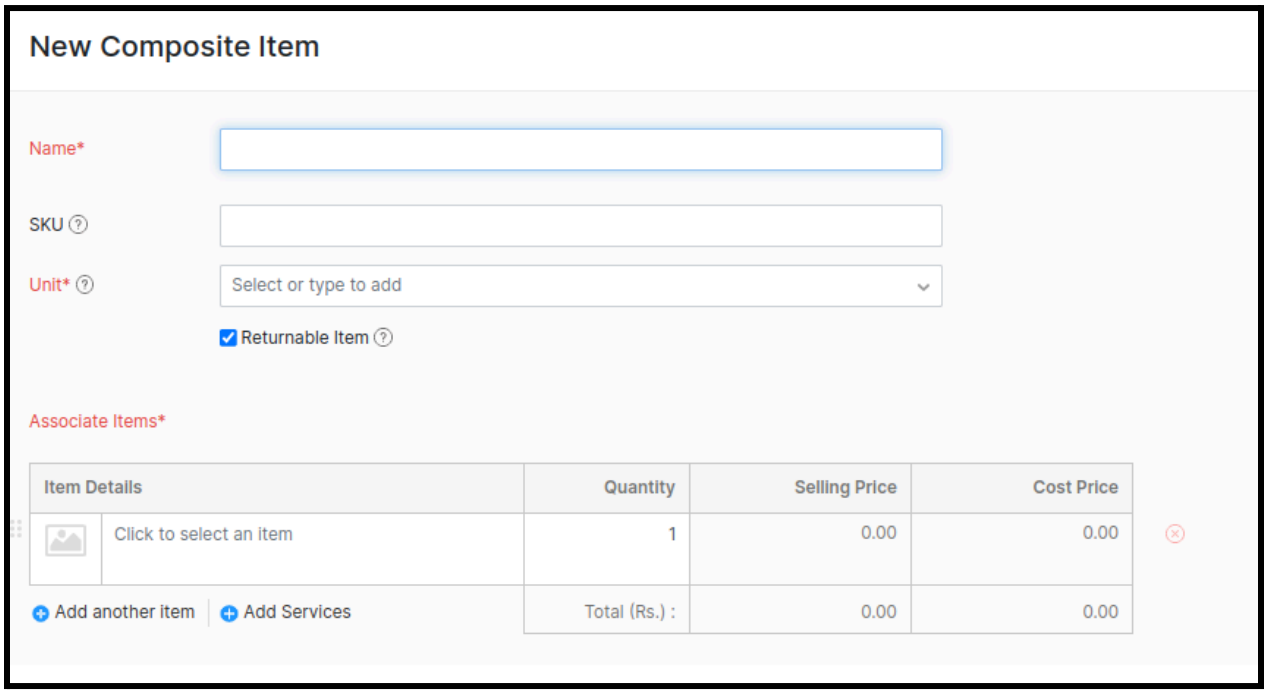
2.5 to 3.0 ==> 3

=> in **“Inactive/Active”,**

-> You can Disable/Enable Product from these options.

C) . Composite Item (Grouped Products)

1). This feature is available for both methods WebHooks (Automation) & API.
2). You can Create, Update and Delete Composite Items.



3). NOTE :- In magento there are some different product types as described Above. So, If you want to Create **Composite Items** then you must create **Items** first then you will be able to create it in your Zoho Inventory account or sync with Magento.

4). You can only sync the below details From Zoho To Magento.
=> Name, Description.

=> in **"SKU",**
-> If you want to add Products then Zoho's SKU field is required, Otherwise magento can not able to create it.
-> NOTE :- This field value is must unique then any other Products & Duplication are not allowed.

=> in **"Weight",**
-> You can add weight as you want.
-> Limitation :- Unit Conversion is not possible for Zoho to Magento, But we added it's values are the same in zoho to magento.

=> In **"Associate Items",**

-> First your Inventory **"Items"** are must synced with Magento which will you add in "Composite Item".

-> From **"Item Details"** you can added Items which you want But these Items must synced with magento otherwise Magento not able to added "Composite Item"

-> From **"Quantity"** you can add Stock/Quantity.

-> **Limitation** :- When We add **Quantity/Stock** it works like below Example.

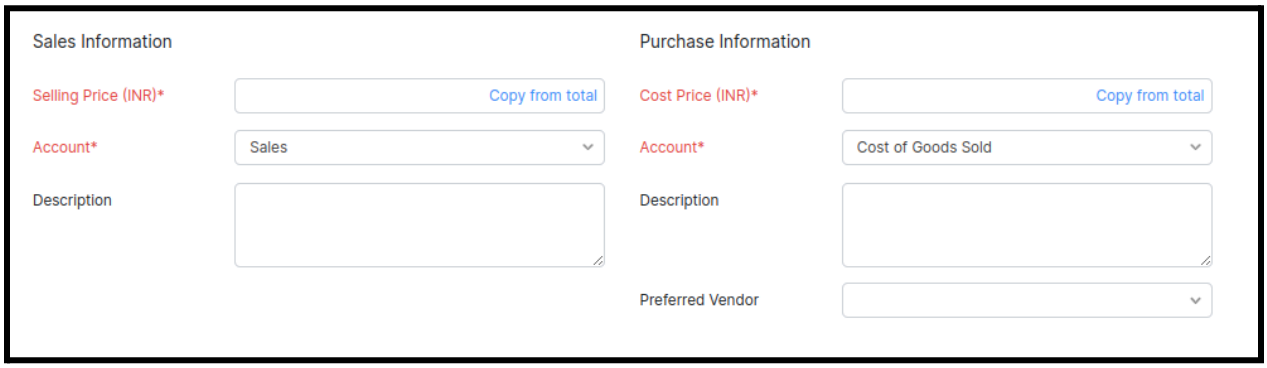
If you add 2.3 value then it converts to 2.

But you add 2.5 then it converts to 3.

2.0 to 2.4 ==> 2

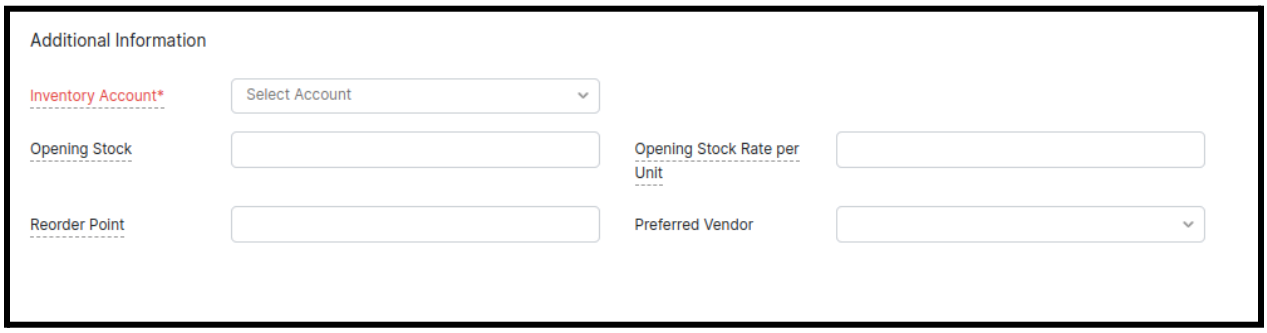
2.5 to 3.0 ==> 3

-> From **"Selling Price"** you can add the Price of "Items".



=> In **"Sales Information",**

-> You can add Selling **Price/Total Price** Of Composite Item.



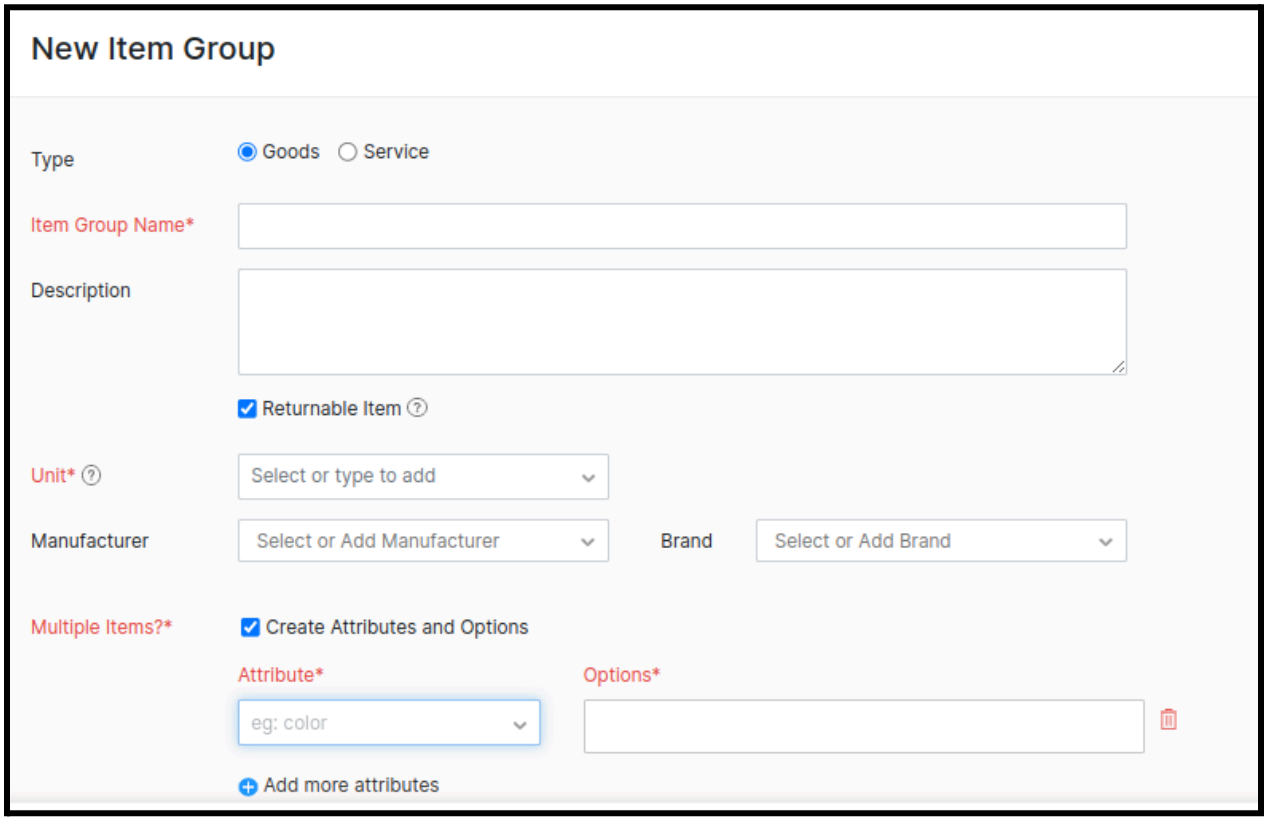
=> In **"Additional Information",**

-> In **"Inventory Account"** you must select **"Finished Goods".**

-> Now You can add **"Opening Stock"** value.

D) . Item Group (Configurable Products)

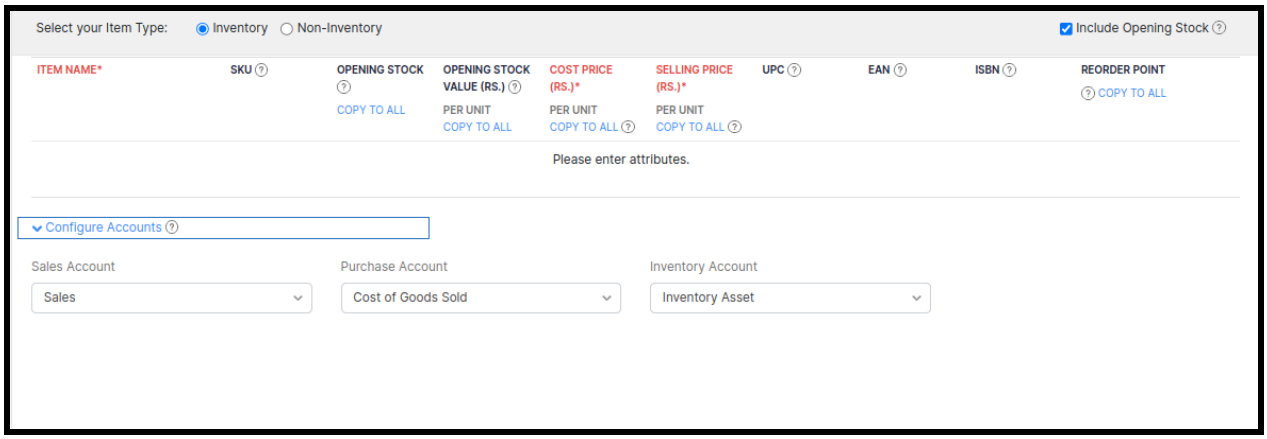
1). This feature is available only from API.
2). You can Create & Update Item Group.



3). NOTE :- In magento there are some different product types as described Above. So, If you want to Create an **Item Group** then you must create **Items** first then you will be able to create it in your Zoho Inventory account or sync with Magento.

4). You can only sync the below details From Zoho To Magento.
=> Name, Description.

=> In **"Multiple Items",**
-> You must select **"Create Attributes and Options".**
-> In **"Attributes"** add it's with **"Options".**
-> Ex. Attribute is "Color" & Options is "Black, White, Gray"



5). Now You can Generate below things.

=> Item Name

=> SKU

=> Opening Stock

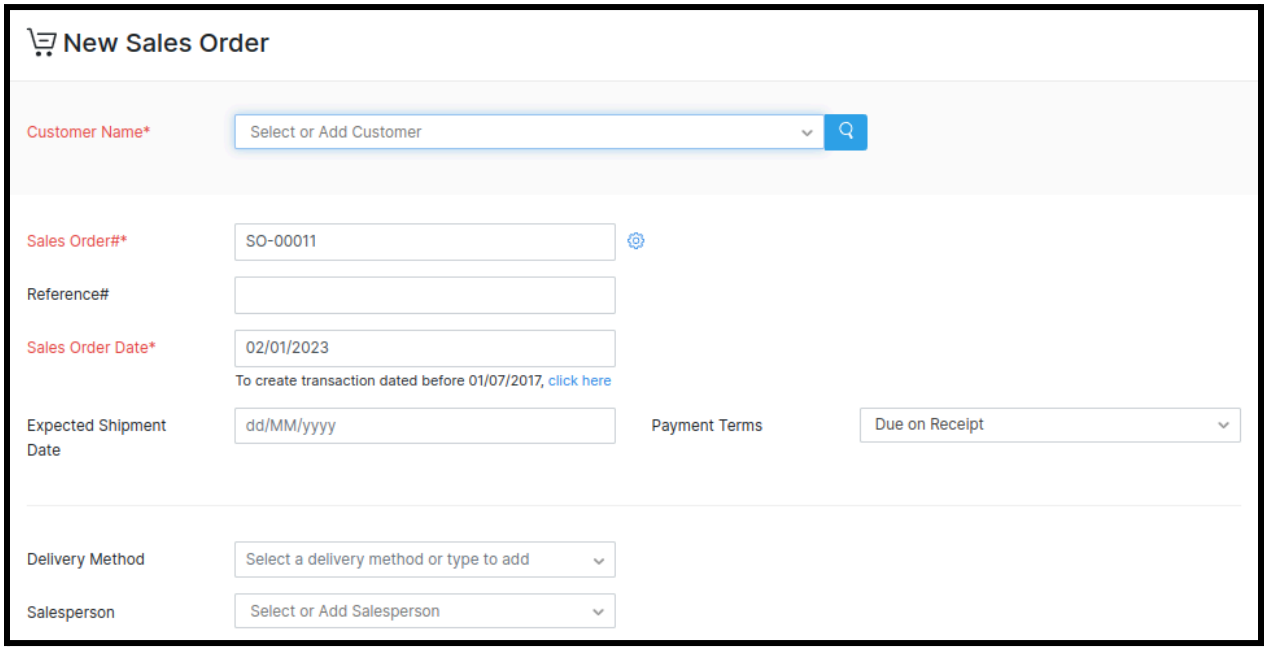
=> Opening Stock Value

=> Cost Price

=> Selling Price

E) . Sales Orders

1). This feature is available for both methods WebHooks (Automation) & API.
2). You can only Create Sales Orders, Update & Delete methods not available.



3). NOTE :- If you want to create/sync sales orders you need to follow below flow in your zoho inventory account.

=> First your Inventory **"Customers"** & **"Products (any types)"** are must synced with Magento which you will add in "Sales Orders".

=> Below is the Zoho's Sales orders flow.

Sales Orders -> Packages -> Shipments -> Delivery Challans -> Invoices -> Payment Received -> Sales Returns -> Credit Notes.

4). You can only sync the below details From Zoho To Magento.

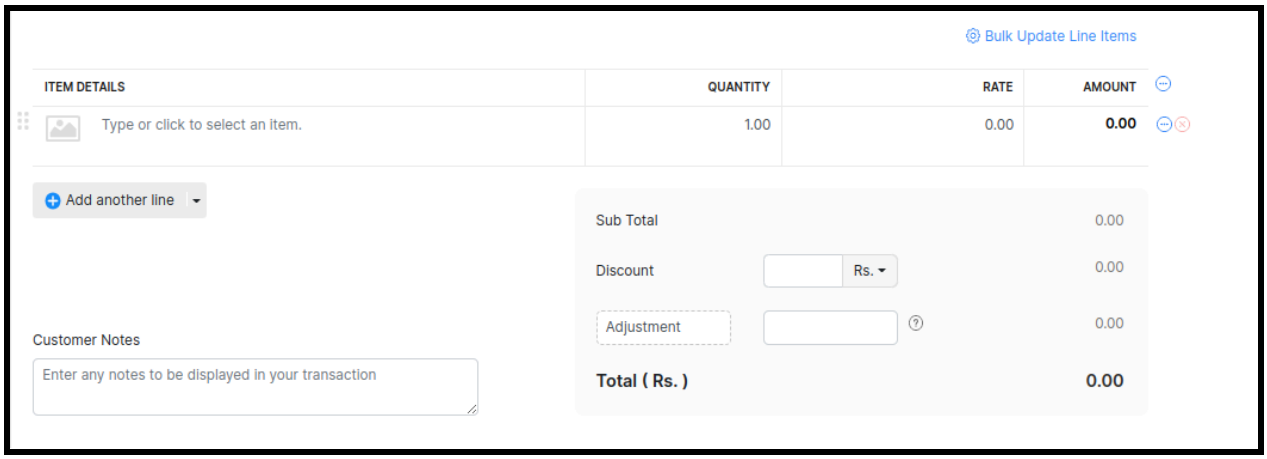
=> in **"Customer Name",**

-> You can add Customer from this dropdown.

=> in **"Delivery Method",**

-> You must add value as **"freeshipping_freeshipping"**.

-> NOTE :- You must add the above value Because Magento does not allow invalid Methods.



5). In **“Line Items”,**

=> from **"Item Details"** you can add items/products.

=> from **"Quantity"** you can add quantity,

-> Limitation :- When We add **Quantity/Stock** it works like below Example.

If you add 2.3 value then it converts to 2.

But you add 2.5 then it converts to 3.

2.0 to 2.4 ==> 2

2.5 to 3.0 ==> 3

=> from **"Discount"** you can add a discount for the whole order.

F) . Shipments, Invoices & Sales Returns

1). This feature is available for both methods WebHooks (Automation) & API.

2). You can only Create, Update & Delete methods not available.

3). You can only syncing below details From Zoho To Magento.

=> First You need to create **"Packages".**



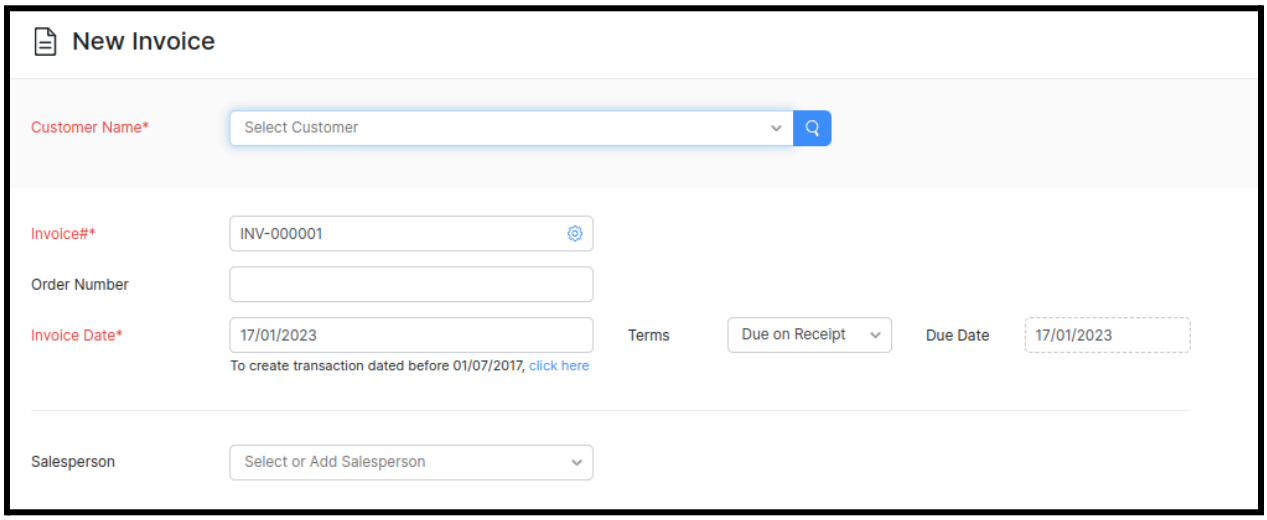
=> After this Now click on **"Ship"** and click on **"Ship via manually"** and add all details.



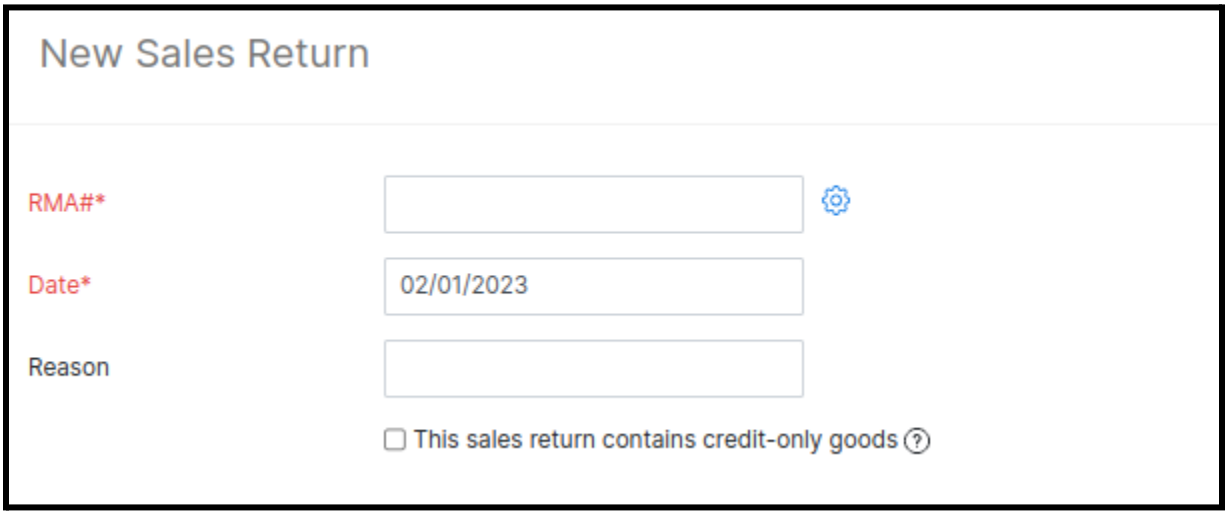
-> in **"New Shipment",**

-> form add **"Carrier"** values in as **"freeshipping_freeshipping"**.

=> Now you can add **"Invoices".**



=> After invoices you can create **"Sales Returns".**



- **NOTE :-** Data Migration Error handling, Log file is located at below path/file in your Magento root folder.

  /var /log /zohoErrors.log

- **NOTE :-** Photos are not synced.