



IT technicians · Zoho One optimization



Zoho Inventory

User and Administrator Manual

→ [Go to the index](#)

Prepared by Nuagix · September 2026

nuagix.ca · support@nuagix.ca

Zoom meeting: <https://nuagix.zohobookings.com/#!/andre-martin>

Index — English version

Click any title to jump directly to that section. Each chapter ends with a “Back to index” link.

PART 1 — USER GUIDE

1. Introduction and access

- 1.1 About this manual
- 1.2 What is Zoho Inventory?
- 1.3 Signing in

2. Interface and navigation

- 2.1 Main modules
- 2.2 Navigation tips

3. Items and item groups

- 3.1 Creating an item
- 3.2 Item groups
- 3.3 Other options

4. Assemblies and kits

- 4.1 Combined item types
- 4.2 Creating an assembly

5. Warehouses, locations and transfers

- 5.1 Warehouses and locations
- 5.2 Transfer order

6. Sales orders

- 6.1 Creating a sales order
- 6.2 Order cycle
- 6.3 Stockouts and dropshipping

7. Picking, packages and shipments

- 7.1 Picking and packing
- 7.2 Shipping

8. Purchases and receiving

- 8.1 Creating a purchase order
- 8.2 Receiving goods
- 8.3 Other purchasing documents

9. Batches and serial numbers

- 9.1 Tracking methods
- 9.2 Using tracking

10. Adjustments, counts and replenishment

- 10.1 Inventory adjustment
- 10.2 Stock count
- 10.3 Replenishment

11. Reports

- 11.1 Main reports
- 11.2 Using a report

12. Mobile app

12.1 Features

13. Best practices

13.1 Nuagix recommendations

PART 2 — ADMINISTRATOR GUIDE

14. Users and roles

14.1 Roles

14.2 Adding a user

14.3 When an employee leaves

15. Organization settings

15.1 Profile and preferences

15.2 Opening stock

16. Customization

16.1 Options

17. Automation

17.1 Automation tools

17.2 Example: low-stock alert

18. Sales channels

18.1 Available channels

18.2 Connecting a Shopify store

19. Integrations

19.1 Zoho integrations

19.2 Other integrations

20. Security and compliance

20.1 Security controls

20.2 Privacy and Quebec Law 25

21. Editions and licenses

21.1 Editions

21.2 Tracking usage

22. Deployment checklist

22.1 Before going live

APPENDIX

A. English-French glossary

A.1 Interface terms

Part 1 — User Guide

1. Introduction and access
2. Interface and navigation
3. Items and item groups
4. Assemblies and kits
5. Warehouses, locations and transfers
6. Sales orders
7. Picking, packages and shipments
8. Purchases and receiving
9. Batches and serial numbers
10. Adjustments, counts and replenishment
11. Reports
12. Mobile app
13. Best practices

[↑ Back to index](#)

1. Introduction and access

1.1 About this manual

This manual describes the Zoho Inventory features available to users and the functions reserved for administrators, as available in September 2026.

Available features vary by edition (Free, Standard, Professional, Premium, Enterprise) and by your organization's configuration.

1.2 What is Zoho Inventory?

Zoho Inventory is Zoho's stock and order management software. It tracks your items and their quantities in one or more warehouses, manages the sales order cycle (picking, packing, shipping, invoicing) and the purchasing cycle (receiving, bills, returns), traces batches and serial numbers, and syncs stock with your online stores. It shares its data with Zoho Books for accounting.

1.3 Signing in

1. Go to <https://inventory.zoho.com> (or <https://inventory.zohocloud.ca> if your organization is hosted in the Canadian data center).
2. Sign in with your Zoho account or your organization's single sign-on.
3. If you use Zoho One, open the app launcher and select Inventory.
4. Complete multi-factor authentication with Zoho OneAuth if required.

Nuagix tip — Install the Zoho Inventory mobile app on warehouse devices: it scans barcodes for picking, receiving and stock counts.

[↑ Back to index](#)

2. Interface and navigation

2.1 Main modules

Module	Content
Dashboard	Sales activity, quantities to pack, ship and receive, items below reorder point
Items	Items, item groups, assemblies, price lists
Inventory	Adjustments, transfer orders, stock counts, replenishment
Sales	Customers, sales orders, picklists, packages, shipments, invoices, returns
Purchases	Vendors, purchase orders, receives, bills, purchase returns
Integrations	Sales channels, carriers and connected apps
Reports	Stock, sales, purchases, valuation, batches and serial numbers
Settings	Organization configuration, mostly reserved for administrators

2.2 Navigation tips

- Global search by item name, SKU, barcode or order number
- + button to quickly create a transaction
- Custom views and filters in every list
- History and comments on every transaction
- Warehouse selector to see quantities by location

[↑ Back to index](#)

3. Items and item groups

3.1 Creating an item

1. Items > Items > New.
2. Choose the type: goods or service.
3. Enter the name, SKU, unit of measure, barcode (UPC, EAN) and an image.
4. Enter the selling price, purchase cost, accounts and default tax (GST and QST).
5. Check Track Inventory, enter the opening stock per warehouse and the reorder point.
6. If needed, enable batch or serial number tracking, then save.

Caution — The SKU must be unique and stable: it links the item to online stores, barcodes and imports.

3.2 Item groups

An item group brings together the variants of one product based on attributes (e.g., size, colour, material). Create the group and define the attributes and their values: Inventory generates each variant with its own SKU, price and stock.

3.3 Other options

- Price lists for pricing by customer, channel or volume
- Units of measure and conversions (e.g., case of 12 units)
- Categories and brands to organize the catalogue
- Import and export items as CSV or XLSX
- Printable, customizable barcode labels

[↑ Back to index](#)

4. Assemblies and kits

4.1 Combined item types

Type	Use
Assembly / composite item	Product built from components; assembling consumes the components and adds the finished product to stock
Kit item	Items sold together at a separate price, with no build step; component stock decreases on sale
Associated services	Labour or charges added to an assembly's cost

4.2 Creating an assembly

1. Items > Assemblies > New.
2. Enter the name, SKU and price of the finished product.
3. Add the components (items and services) with their quantities (bill of materials).
4. Save the item.
5. To build, create an assembly (Assemble): enter the quantity and warehouse; components are removed and the finished product added.

Nuagix tip — Check component availability before confirming an order for an assembled product: the availability report helps you avoid stockouts.

[↑ Back to index](#)

5. Warehouses, locations and transfers

5.1 Warehouses and locations

- Multiple warehouses or locations, with separate quantities per item
- Bin locations: aisle, rack, shelf, depending on edition
- Warehouse selection on every sales order and purchase order
- Stock reports by warehouse

5.2 Transfer order

1. Inventory > Transfer Orders > New.
2. Choose the source and destination warehouses.
3. Add items and quantities (with batches or serial numbers, if applicable).
4. Save as in transit, then mark as Transferred on arrival.
5. Quantities are updated in both warehouses.

[↑ Back to index](#)

6. Sales orders

6.1 Creating a sales order

1. Sales > Sales Orders > New.
2. Choose the customer, warehouse and expected shipment date.
3. Add items; Inventory shows available and committed stock.
4. Check prices, discounts, shipping charges and taxes (GST and QST).
5. Save and confirm (Confirmed); send the confirmation to the customer.

6.2 Order cycle

Step	Document
1. Order	Confirmed sales order
2. Picking	Picklist
3. Packing	Package with packing slip
4. Shipping	Shipment with carrier and tracking number
5. Invoicing	Invoice, before or after shipping
6. Collection	Payment received
7. Return, if applicable	Sales return and credit note

6.3 Stockouts and dropshipping

- Backorder: create a purchase order for missing items from the sales order
- Dropship: the vendor ships directly to the customer
- Partial shipments when not all items are available
- Visible statuses: to be packed, packed, shipped, delivered, invoiced

Nuagix tip — Use the expected shipment date on every order: the list of orders to pick becomes your daily warehouse work plan.

[↑ Back to index](#)

7. Picking, packages and shipments

7.1 Picking and packing

1. Create a picklist for one or more orders.
2. Assign it to a picker; they scan barcodes in the mobile app.
3. Create the package: items, quantities, batches or serial numbers, weight and dimensions.
4. Print the packing slip.

7.2 Shipping

1. From the package, click Ship.
2. Choose manual shipment (carrier and tracking number) or an integrated carrier, depending on available integrations.
3. With an integrated carrier, compare rates, buy the label and print it.
4. The customer receives a shipment notification with the tracking link.
5. Mark as delivered, manually or automatically depending on the carrier.

Note — The integrated carriers and shipping aggregators available in Canada vary; check the list in Integrations > Shipping.

[↑ Back to index](#)

8. Purchases and receiving

8.1 Creating a purchase order

1. Purchases > Purchase Orders > New, or from a sales order or a replenishment alert.
2. Choose the vendor, delivery warehouse and expected date.
3. Add items, quantities and costs; check taxes.
4. Send the purchase order to the vendor (status: Issued).

8.2 Receiving goods

1. Open the purchase order > Receive.
2. Enter the quantities received, including partial receipts.
3. Enter batches (with expiry date) or serial numbers, if applicable.
4. Save: warehouse stock increases.
5. Convert to a bill when the vendor invoice arrives.

Caution — Never increase stock with an adjustment for goods received from a vendor: use the receive so that cost and payables are accurate.

8.3 Other purchasing documents

- Purchase return, linked to a purchase order or not
- Vendor credit
- Landed cost: allocate freight, duties and brokerage to item cost
- Payments made to vendors

[↑ Back to index](#)

9. Batches and serial numbers

9.1 Tracking methods

Method	Use
Serial number	One unique number per unit (electronics, equipment, tools)
Batch	One number per production batch, with manufacturing and expiry dates (food, cosmetics, pharmaceuticals)

9.2 Using tracking

- Batch or serial number entry on receiving, packing and transfer
- Choice of which batch to ship first (e.g., earliest expiry date)
- Complete history of a serial number or batch: vendor, warehouse, customer
- Reports on expired or soon-to-expire batches
- Product recall support: quickly identify affected customers

Nuagix tip — For food or regulated products, enable batch tracking from the start: adding it later requires recounting all existing stock.

[↑ Back to index](#)

10. Adjustments, counts and replenishment

10.1 Inventory adjustment

1. Inventory > Inventory Adjustments > New.
2. Choose the mode: quantity or value.
3. Choose the account and reason (e.g., damage, theft, sample, count correction).
4. Add items, warehouse and the new quantity or difference.
5. Attach a supporting document and save (draft or adjusted).

10.2 Stock count

1. Inventory > Stock Counts > New: choose the warehouse and items.
2. Assign the count to an employee, who counts with the mobile app.
3. Compare counted quantities with system quantities.
4. Approve: differences generate the corresponding adjustment.

10.3 Replenishment

- Reorder point per item and notification when it is reached
- Replenishments: automatic purchase order suggestions based on reorder points
- Preferred vendor per item
- Report of items below the reorder point

Nuagix tip — Do cycle counts (a few categories every week) rather than a single annual inventory: discrepancies are spotted sooner.

[↑ Back to index](#)

11. Reports

11.1 Main reports

Report	Purpose
Inventory Summary	Quantities on hand, committed and available per item
Inventory Valuation	Stock value by costing method (FIFO or weighted average)
Sales by item / by customer	Most profitable items and customers
Stock Aging	Slow-moving items
Batch and serial number history	Full traceability
Purchase reports	Purchases by vendor, pending receipts
Sales channel performance	Sales per online store

11.2 Using a report

1. Reports > choose the report.
2. Select the period, warehouse and filters.
3. Export to PDF, CSV or XLSX, or schedule email delivery.
4. Build a custom dashboard or use Zoho Analytics to go further.

[↑ Back to index](#)

12. Mobile app

12.1 Features

- Barcode scanning with the camera or a compatible scanner
- Order picking from picklists
- Receiving purchase orders
- Stock counts and adjustments
- Creating sales orders and checking stock
- Replenishment notifications

[↑ Back to index](#)

13. Best practices

13.1 Nuagix recommendations

- Use a unique, simple and permanent SKU for every item
- Label your locations and items with barcodes
- Record every movement in the system the same day: receiving, shipping, transfer
- Never change stock “by hand” to fix an order: use the right document
- Do cycle counts and analyze discrepancies
- Set realistic reorder points and review them every season
- Write item descriptions and customer documents in French for the Quebec market

[↑ Back to index](#)

Part 2 — Administrator Guide

- 14. Users and roles
- 15. Organization settings
- 16. Customization
- 17. Automation
- 18. Sales channels
- 19. Integrations
- 20. Security and compliance
- 21. Editions and licenses
- 22. Deployment checklist

[↑ Back to index](#)

14. Users and roles

14.1 Roles

Role	Access
Admin	Full access to transactions, reports and settings
Staff	Access to operational modules, without settings
Staff - Assigned Customers Only	Sees only the customers and transactions assigned to them
Custom roles	Permissions per module (view, create, edit, delete, approve), per warehouse and per report

14.2 Adding a user

1. Settings > Users & Roles > Invite User.
2. Enter the name and email address.
3. Choose the role (e.g., a custom Picker role limited to picklists and packages).
4. Restrict access to the relevant warehouses, if needed.
5. The user receives an email invitation.

Note — In Zoho One, first add the user in the Zoho One console and assign them the Inventory app.

14.3 When an employee leaves

1. Reassign their open picklists, counts and approvals.
2. Review draft transactions they created.
3. Remove their access to warehouse mobile devices.
4. Deactivate or delete the user to free the license.

Caution — Do not share one account among several warehouse employees: the history must show who moved each item.

[↑ Back to index](#)

15. Organization settings

15.1 Profile and preferences

1. Settings > Organization > Profile: legal name, address, base currency (CAD), time zone, language.
2. Settings > Taxes: GST and QST numbers, rates and default taxes.
3. Settings > Preferences > Items: costing method (FIFO or weighted average), units, batch and serial number tracking.
4. Decide whether selling an item into negative stock is allowed.
5. Configure warehouses or locations and the primary warehouse.

Caution — The costing method and base currency are difficult, or impossible, to change once transactions are entered. Confirm them with your accountant.

15.2 Opening stock

Before going live, do a full physical count and enter the opening stock per item and per warehouse, with unit cost, batches and serial numbers. The total value must match the inventory account balance in your books.

Note — This manual does not replace advice from your accountant on inventory valuation and tax treatment.

[↑ Back to index](#)

16. Customization

16.1 Options

- Document templates (orders, packing slips, invoices) in French and English, with your logo
- Transaction numbering (prefixes and series)
- Custom fields on items, customers and transactions
- Hierarchical reporting tags to analyze by division or project
- Barcode label templates
- Email templates and WhatsApp notifications
- Customer portal for order tracking, depending on edition

[↑ Back to index](#)

17. Automation

17.1 Automation tools

Tool	Use
Workflow rules	Send an email, update a field or call a webhook on an event
Multi-level approvals	Have orders, purchase orders or adjustments approved
Replenishments	Create purchase orders automatically based on reorder points
Custom functions (Deluge)	Custom logic, depending on edition
Zoho Flow and webhooks	Connect Inventory to other apps

17.2 Example: low-stock alert

1. Set the reorder point for each item.
2. Settings > Automation > Workflow Rules: create a rule on items.
3. Condition: available stock less than or equal to the reorder point.
4. Action: email the buyer, or create a replenishment.
5. Test with a dummy item.

[↑ Back to index](#)

18. Sales channels

18.1 Available channels

Channel	Sync
Shopify	Items, orders, stock and shipments
Amazon	Orders and stock, depending on available marketplaces
WooCommerce	Items, orders and stock
Etsy and eBay	Orders and stock, depending on available integrations
Zoho Commerce	Zoho online store, natively integrated
Point of sale (POS)	In-store sales, depending on the chosen integration

18.2 Connecting a Shopify store

1. Integrations > Sales Channels > Shopify > Connect.
2. Authorize access from your Shopify account.
3. Choose the warehouse that feeds the store's stock.
4. Map existing items by SKU; import or export missing items.
5. Enable order and stock sync, then test with a real order.

Caution — Before connecting a channel, clean up your SKUs on both sides: mismatched SKUs create duplicate items and incorrect stock.

[↑ Back to index](#)

19. Integrations

19.1 Zoho integrations

Application	Typical use
Zoho Books	Accounting: invoices, bills, payments and stock value shared
Zoho CRM	Customers, items and orders synced with sales
Zoho Commerce	Online store with real-time stock
Zoho Desk	Orders and returns visible in support tickets
Zoho Analytics	Advanced stock and sales dashboards
Zoho Flow	Cross-app automations

Note — Zoho Inventory and Zoho Books share the same organization when used together: customers, items and transactions are common.

19.2 Other integrations

- Carriers and shipping aggregators, depending on integrations available in Canada
- Payment gateways (e.g., Stripe, PayPal)
- Barcode scanners and label printers
- REST API (OAuth 2.0) and webhooks

[↑ Back to index](#)

20. Security and compliance

20.1 Security controls

- Multi-factor authentication and single sign-on (SAML) via Zoho Accounts / Zoho Directory
- Custom roles restricting access by module and warehouse
- Approvals for adjustments and sensitive transactions
- Activity log and history on every transaction
- Transaction locking for closed periods, in coordination with Zoho Books
- Hosting in the Canadian data center (zohocloud.ca)

20.2 Privacy and Quebec Law 25

- Limit customers' personal information to what is needed for the order and delivery
- Control access to customer addresses and contact details
- Govern data sharing with carriers and sales channels
- Handle access, correction and deletion requests

Note — This manual is not legal advice. Confirm your obligations with your legal advisor.

[↑ Back to index](#)

21. Editions and licenses

21.1 Editions

Edition	For whom
Free	Very small businesses: one warehouse, limited order volume
Standard	Small businesses: orders, purchases, sales channels
Professional	Growing businesses: multiple warehouses, batches and serial numbers, assemblies
Premium / Enterprise	Advanced operations: bin locations, approvals, custom dashboards, higher limits
Zoho One / Zoho Finance Plus	Inventory included with the suite's other apps

Note — The feature split and limits (orders, warehouses, users) change: confirm them on the Zoho Inventory pricing page.

21.2 Tracking usage

Settings > Subscription shows the edition and the number of users, warehouses and orders used. Remove inactive users.

[↑ Back to index](#)

22. Deployment checklist

22.1 Before going live

- ☐ Organization profile, currency (CAD), GST and QST configured
- ☐ Costing method validated by your accountant
- ☐ Warehouses, locations and bin locations created
- ☐ Items, groups and assemblies imported with unique SKUs
- ☐ Batch or serial number tracking enabled for the relevant items
- ☐ Full physical count done and opening stock entered
- ☐ Reorder points and preferred vendors defined
- ☐ Document templates in French and English
- ☐ Users, roles and warehouse access configured
- ☐ Zoho Books integration checked (inventory and cost of goods sold accounts)
- ☐ Sales channels and carriers connected and tested
- ☐ Mobile app and barcode scanners ready
- ☐ Users trained and documentation delivered

Nuagix tip — Nuagix can support your team with Zoho Inventory setup, integration and training. Book a Zoom meeting: <https://nuagix.zohobookings.com/#!/andre-martin>

[↑ Back to index](#)

Appendix

A. English-French glossary

[↑ Back to index](#)

A. English-French glossary

A.1 Interface terms

English (interface)	French
Item	Article
Item Group	Groupe d'articles
Assembly / Composite Item	Assemblage
Kit Item	Ensemble
SKU	UGS
Warehouse / Location	Entrepôt / emplacement
Bin Location	Emplacement de rangement
Sales Order	Commande client
Picklist	Liste de préparation
Package	Colis
Shipment	Expédition
Sales Return	Retour de vente
Purchase Order	Bon de commande
Purchase Receive	Réception
Bill	Facture fournisseur
Inventory Adjustment	Ajustement d'inventaire
Transfer Order	Ordre de transfert
Batch / Serial Number	Lot / numéro de série
Reorder Point	Seuil de réapprovisionnement
Stock Count	Décompte de stock

[↑ Back to index](#)