



Zoho Inventory – Tally Integration

Installation, Configuration & User Guide

1 Overview

This document explains how to configure and use the Zoho Inventory – Tally Integration module. The integration allows automatic synchronization of:

- Items / Products
- Customers
- Vendors
- Sales Orders
- Invoices
- Purchase Orders
- Bills

The system sends records from Zoho Inventory to Tally via Middleware using Webhooks. After a successful sync, the **Tally Reference ID** is stored back in Zoho for tracking.

2 Prerequisites

Before starting setup, ensure:

- Zoho Inventory account with Admin access
- Tally system running and reachable from the middleware
- Middleware URL and Token available
- GST configuration details available
- Required user permissions enabled in Zoho

3 Create Custom Field for Tally Reference ID

This field stores the Tally-side reference after successful sync.

Create Custom Field in Each Module

Repeat the steps below for:

- Items
- Contacts (Customers & Vendors)
- Sales Orders
- Invoices
- Purchase Orders
- Bills

Steps

Go to:

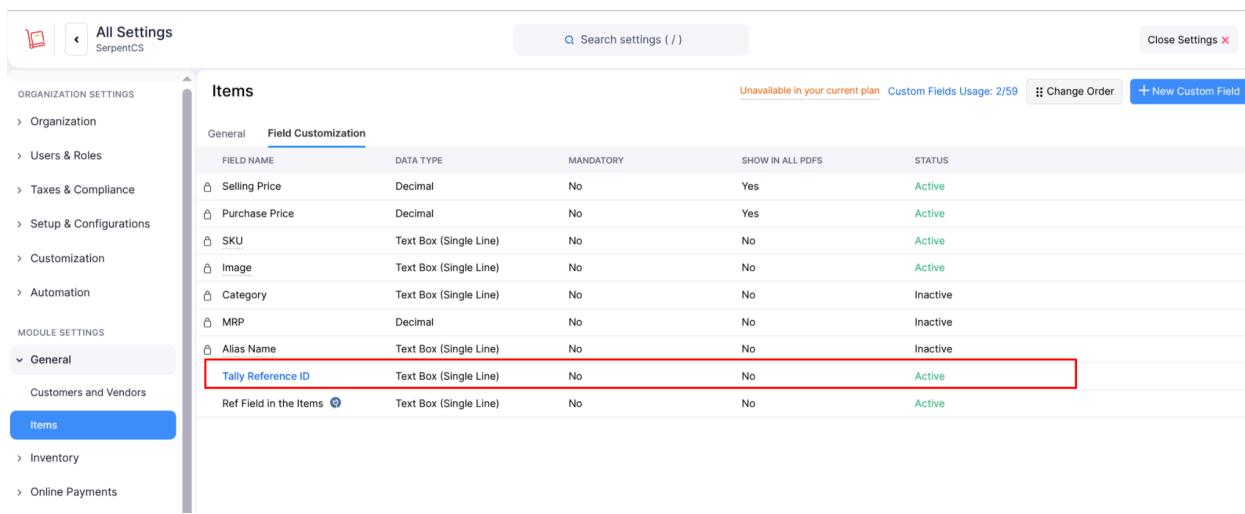
Settings → Module Settings → Select Module → Field Customization → New Custom Field

Fill:

- **Label Name:** Tally Reference ID
- **Data Type:** Text Box (Single Line)
- **Input Format:** Alphanumeric with hyphen and underscore
- **Internal Name (recommended):** cf_tally_reference_id

Click **Save**

Repeat for all listed modules.



The screenshot shows the 'Field Customization' section for the 'Items' module in Zoho Inventory. The 'Field Customization' tab is selected. A table lists various fields with their details:

FIELD NAME	DATA TYPE	MANDATORY	SHOW IN ALL PDFS	STATUS
Selling Price	Decimal	No	Yes	Active
Purchase Price	Decimal	No	Yes	Active
SKU	Text Box (Single Line)	No	No	Active
Image	Text Box (Single Line)	No	No	Active
Category	Text Box (Single Line)	No	No	Inactive
MRP	Decimal	No	No	Inactive
Alias Name	Text Box (Single Line)	No	No	Inactive
Tally Reference ID	Text Box (Single Line)	No	No	Active
Ref Field in the Items	Text Box (Single Line)	No	No	Active

A red box highlights the 'Tally Reference ID' row. The left sidebar shows navigation paths for Organization, Users & Roles, Taxes & Compliance, Setup & Configurations, Customization, Automation, and various module settings like General, Customers and Vendors, and Items.

4 GST Setup

Steps

Go to:

Settings → Taxes & Compliance → Taxes → GST Settings

Configure:

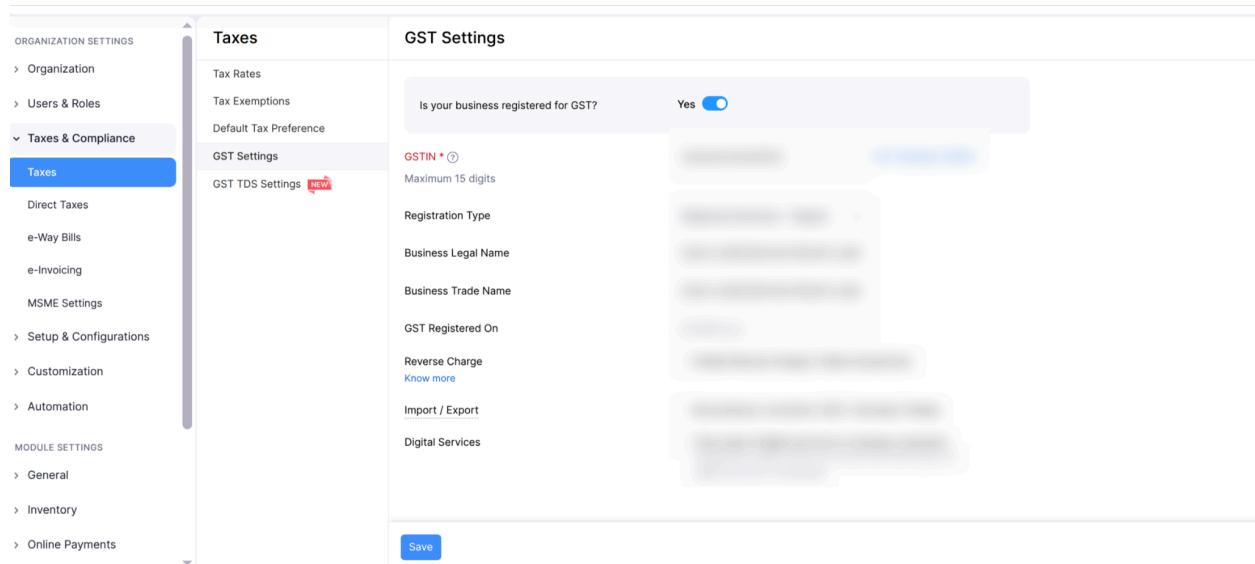
- GST Number
- Business Location
- Tax preferences

Click: Fetch GST Taxes

Verify the GST and configure as per the company policy.

- CGST
- SGST
- IGST
- CESS (if applicable)

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5 Enable Approvals (Optional but Recommended)

Used when you want approval before sending to Tally.

Enable for:

- Invoice
- Bill

Steps

Settings → Module Settings → Select Module → Approvals

Select: Simple Approval

Define:

- Approver roles
- Approval condition (optional)

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The screenshot shows the 'Invoices' settings page in the Verticalis application. The 'Approvals' tab is selected. Under 'Approval Type', the 'Simple Approval' option is selected and highlighted with a red box. The 'Multi-Level Approval' option is also present. The left sidebar shows the 'Invoices' module is selected. The 'Save' button is at the bottom right.

6 Outgoing Webhook Setup (Middleware Sync)

Webhook sends data to middleware for Tally posting.

Create Webhook

Go to: Settings → Automation → Workflow Actions → Webhooks → New Webhook

Basic Details

- **Name:** Example — Tally Sync Invoice
- **Module:** Select required module
- **Method:** POST

URL: Your Middleware Endpoint

Example:

<https://www.verticalisbs.com/zoho-inventory-to-tally-integration>

Note: The Middleware URL and Key will be provided by the Verticalis team after the approvals.

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Headers

Add:

X-Middleware-Key : <your_token> (API key will be provided via email after registration and approval)

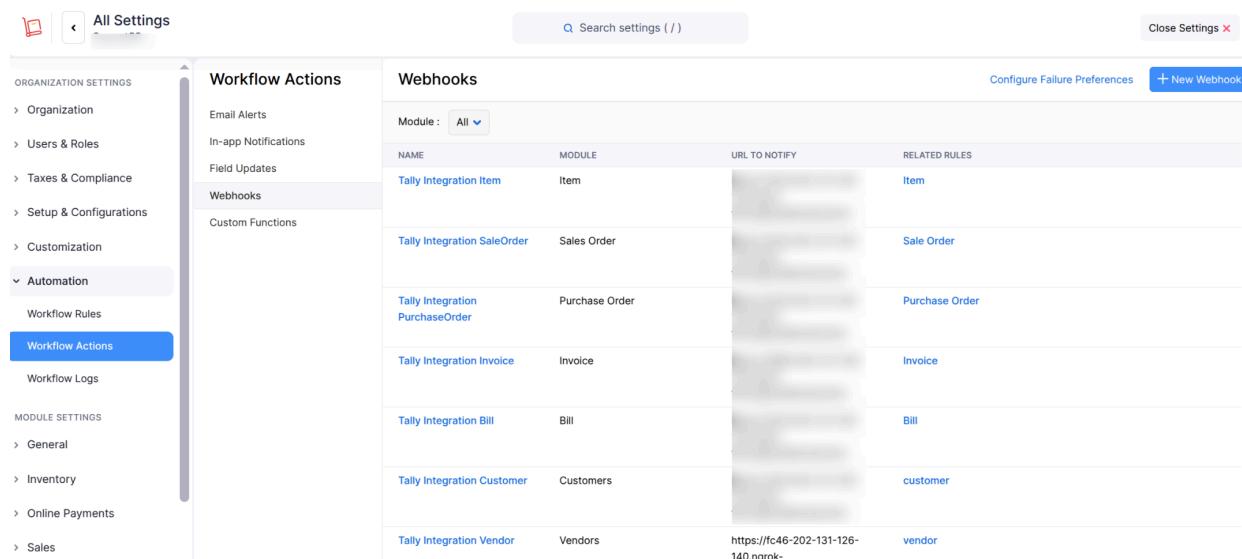
Voucher_Name : <Tally Voucher Type> Sales or Purchase

Example Voucher Names

Module	Voucher Name
Sales Order	Sales Order
Invoice	Sales
Purchase Order	Purchase Order
Bill	Purchase

(Adjust as per your Tally configuration)

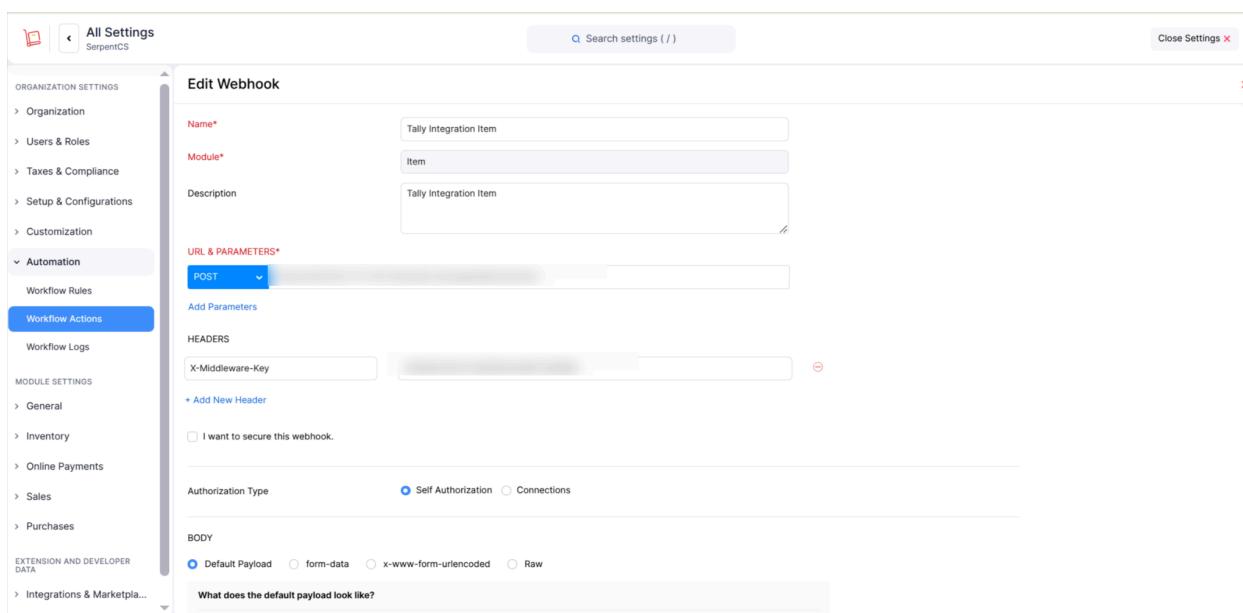
Save Webhook.



The screenshot shows the Zoho Inventory 'All Settings' interface. The left sidebar is collapsed. The main area has a header with 'All Settings' and a search bar. The 'Workflow Actions' section is selected in the sidebar, and its sub-section 'Webhooks' is selected. The 'Webhooks' table lists six entries, each corresponding to a Tally Integration item:

NAME	MODULE	URL TO NOTIFY	RELATED RULES
Tally Integration Item	Item		Item
Tally Integration SaleOrder	Sales Order		Sale Order
Tally Integration PurchaseOrder	Purchase Order		Purchase Order
Tally Integration Invoice	Invoice		Invoice
Tally Integration Bill	Bill		Bill
Tally Integration Customer	Customers		customer
Tally Integration Vendor	Vendors	https://fc46-202-131-126-140.ngrok-	vendor

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7 Workflow Rules Setup

Workflow triggers the webhook automatically.

Create Workflow Rule

Go to: Settings → Automation → Workflow Rules → New Rule

Rule Settings

- **Name:** Sync Invoice to Tally
- **Module:** Invoice
- **Workflow Type:** Event-based
- **Trigger:** Create or Edit

Execution Condition

Set: Execute when field is NOT updated → Tally Reference ID

This prevents duplicate sync.

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Criteria Example

Run only when:

- Status = Approved
- OR Status = Confirmed

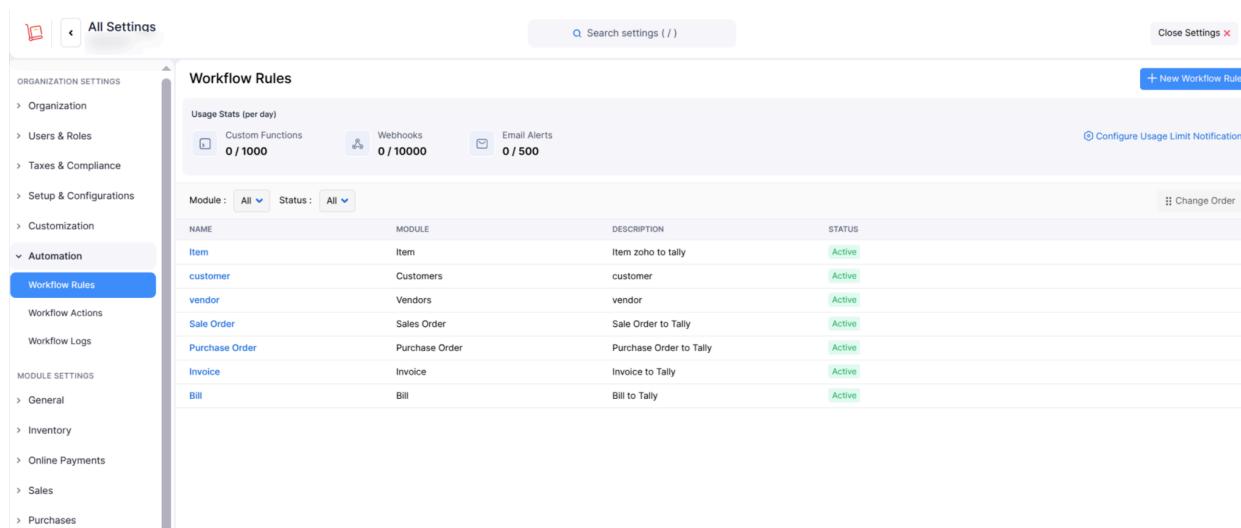
Instant Action

Add: Webhook → Select created webhook

Save rule.

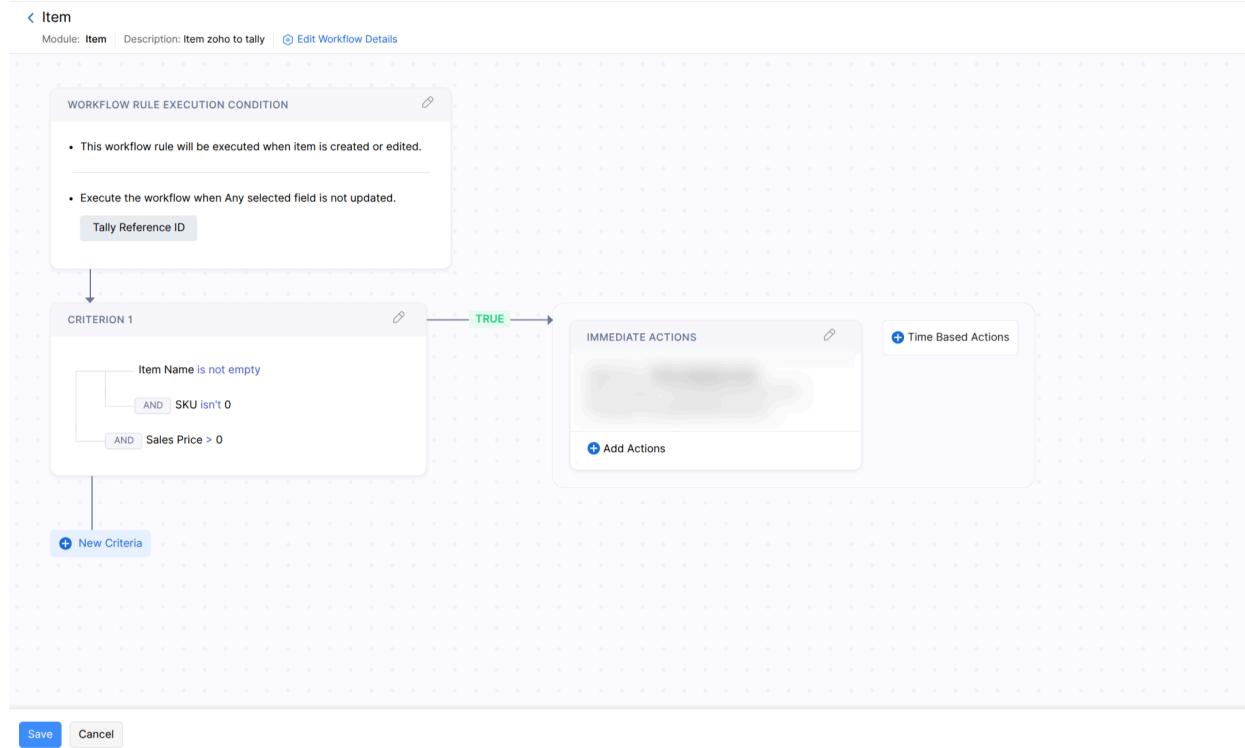
Repeat workflow setup for:

- Items
- Contacts
- Sales Orders
- Invoices
- Purchase Orders
- Bills



NAME	MODULE	DESCRIPTION	STATUS
Item	Item	Item zoho to tally	Active
customer	Customers	customer	Active
vendor	Vendors	vendor	Active
Sale Order	Sales Order	Sale Order to Tally	Active
Purchase Order	Purchase Order	Purchase Order to Tally	Active
Invoice	Invoice	Invoice to Tally	Active
Bill	Bill	Bill to Tally	Active

Zoho Inventory – Tally Integration

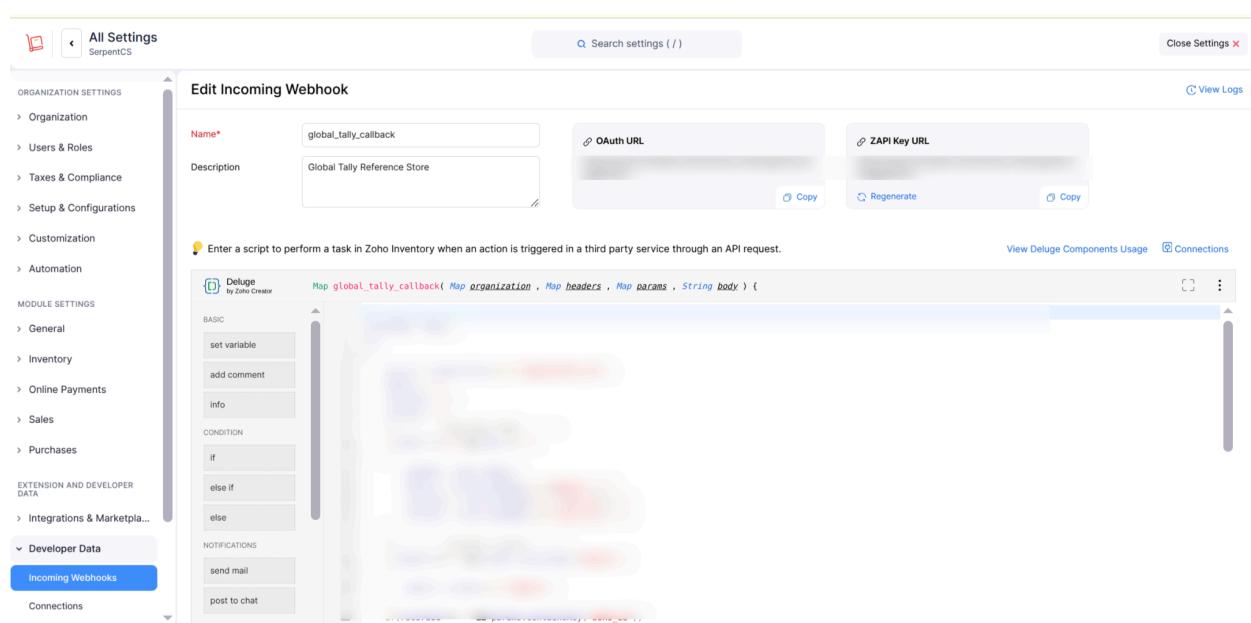


8 Middleware Tally Reference Storage Flow (Incoming Webhook)

After webhook call:

1. Zoho sends record data
2. Middleware converts to Tally XML/JSON
3. Middleware posts to Tally
4. Tally returns the reference number
5. Middleware updates Zoho record:
cf_tally_reference_id = <tally_id>

This confirms sync success.



9 User Guide — Daily Operations



Product / Item Sync Guide

Create Product in Zoho

1. Go to **Items**
2. Click **New Item**
3. Fill:
 - Name
 - SKU
 - Unit
 - Tax
 - HSN Code
 - Purchase/Sales rate
4. Save

ZOHO Product

Zoho Inventory – Tally Integration

Iphone 17

⌚ Returnable Item

Overview Transactions History

Item Type Inventory Items

Unit PCS

Tally Reference ID 3114466000000185001

Created Source User

Tax Preference Taxable

Intra State Tax Rate GST12 (12 %)

Inter State Tax Rate IGST18 (18 %)

Inventory Account Finished Goods

Inventory Valuation Method FIFO (First In First Out)

Purchase Information

Cost Price ₹70,000.00

Purchase Account Cost of Goods Sold

Sales Information

Selling Price ₹1,34,900.00

Sales Account Sales



Adjust Stock

More ▾



Drag image(s) here or

[Browse images](#)

ⓘ You can add up to 15 images, each not exceeding 5 MB in size and 7000 X 7000 pixels resolution.

Opening Stock : 300.00

Edit

Accounting Stock ⓘ

Stock on Hand : 300.00

Committed Stock : 0.00

Available for Sale : 300.00

Physical Stock ⓘ

Stock on Hand : 300.00

Committed Stock : 0.00

Available for Sale : 300.00

Sync to Tally

- Workflow triggers automatically
- Webhook sends item to middleware
- Middleware creates Stock Item in Tally

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Tally Product Reference

Stock Item Alteration (Secondary)		Serpent Trading Co		
Name	: iPhone 17			
(alias)	:			
Under	: Primary			
Units	: PCS			
Additional Details				
Maintain in batches	: No			
Statutory Details				
GST applicability	: Applicable			
HSN/SAC & Related Details				
HSN/SAC Details	: As per Company/Stock Group			
Source of details	: Not Available			
HSN/SAC	:			
Description	:			
GST Rate & Related Details				
GST Rate Details	: As per Company/Stock Group			
Source of details	: Not Available			
Taxability Type	:			
GST Rate	: 0 %			
Type of Supply	: Goods			
Rate of Duty (eg 5)	:			
		Quantity	Rate per	Value
Opening Balance		300 PCS	1,34,900.00 PCS	

Verify in Tally

Open Tally: Gateway → Inventory → Stock Items → Display

Search product name.

Check: Name, Rate, Tax Class, Units

Verify Zoho: Tally Reference ID field is filled

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Customer Sync Guide

Create Customer

1. Go to Contacts > New Contact > Type = Customer > Fill GST + Address > Save

ZOHO Customer

Mr. Virat Kohli

Overview	Comments	Transactions	Mails	Statement
 Mr. Virat Kohli virat@gmail.com +91-9008978789 Invite to Portal				
ADDRESS				
Billing Address No Billing Address - New Address				
Shipping Address No Shipping Address - New Address				
OTHER DETAILS				
Customer Type	Business			
Default Currency	INR			
GST Treatment	Unregistered Business			
Place of Supply	Tamil Nadu			
Tax Preference	Taxable			
Portal Status	• Disabled			
Customer Language	English			
Tally Reference ID	3114466000000185076			
CONTACT PERSONS + ^				

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Verify in Tally

Gateway → Accounts Info → Ledgers

Tally Customer

Ledger Alteration (Secondary)		Serpent Trading Co	
Name	: Mr Virat Kohli		
(alias)	:		
Under	: Sundry Debtors <i>(Current Assets)</i>	Mailing Details	
Maintain balances bill-by-bill	: No	Name	: Mr Virat Kohli
		Address	:
		State	: *Not Applicable
		Country	: *Not Applicable
			Banking Details
			Provide bank details : No
			Tax Registration Details
			PAN/IT No. :
			Registration type :
			GSTIN/UIN :

Check the ledger created under the correct group.

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Vendor Sync Guide

Same as customer, but:

- Type = Vendor
- Group in Tally = Sundry Creditors

ZOHO Vendor

Mr. Rohit Sharma

[Edit](#) [9](#) [New Transaction](#) [More](#) [X](#)

[Overview](#) [Comments](#) [Transactions](#) [Mails](#) [Statement](#)

 **Mr. Rohit Sharma**
rohit.sharma@gmail.com
+91-8990000776

ADDRESS

Billing Address
No Billing Address - [New Address](#)

Shipping Address
No Shipping Address - [New Address](#)

OTHER DETAILS

Default Currency: INR
GST Treatment: Unregistered Business
Source of Supply: Tamil Nadu
Tally Reference ID: 311446600000185126

CONTACT PERSONS

No contact persons found.

BANK ACCOUNT DETAILS

No bank account added yet

Payables

CURRENCY	OUTSTANDING PAYABLES	UNUSED CREDITS
INR- Indian Rupee	₹0.00	₹0.00

Items to be received: 0 | Total items ordered: 0

03/02/2026 03:45 PM  Webhook Tally Integration Vendor associated with the workflow rule vendor executed with response code 200 (Success) by Zoho Inventory

03/02/2026 03:45 PM  Contact updated
Contact updated by raj.m.serpentcs

03/02/2026 03:45 PM  Contact person added
Contact person Rohit has been created by raj.m.serpentcs

Zoho Inventory – Tally Integration

Tally Vendor Reference

Ledger Alteration (Secondary)		Serpent Trading Co	
Name	: Mr Rohit Sharma		
(alias)	:		
Under	: Sundry Creditors (Current Liabilities)	Mailing Details	
Maintain balances bill-by-bill	: Yes	Name	: Mr Rohit Sharma
Default credit period	:	Address	:
Check for credit days during voucher entry	: No	State	: *Not Applicable
		Country	: *Not Applicable
		Banking Details	
		Provide bank details	: No
		Tax Registration Details	
		PAN/IT No.	:
		Registration type	:
		GSTIN/UIN	:
Opening Balance (on 1-Apr-24) : <input style="width: 100px; border: 1px solid #ccc;" type="text"/>			

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Invoice Guide

Create Invoice

1. Create from SO or direct
2. Ensure Approved (if approvals enabled)
3. Save

ZOHO Invoice

Approved
Zoho Invoice

SerpentCS Tamil Nadu India GSTIN 33AACZ4322M1ZA 91-9276006006 raj.m.serpentcs@gmail.com		TAX INVOICE							
# Invoice Date Terms Due Date	: INV-000050 : 01/02/2026 : Due on Receipt : 01/02/2026	Place Of Supply		: Tamil Nadu (33)					
Bill To Mr. Virat Kohli									
#	Item & Description	HSN/SAC	Qty	Rate	CGST	SGST	Amount		
1	Iphone 17		1.00 PCS	1,34,900.00	6% .00	8,094 .00	6% .00	8,094 .00	1,34,900.00
Total In Words Indian Rupee One Lakh Fifty-One Thousand Eighty-Eight Only Notes Thanks for your business.					Sub Total 1,34,900.00 CGST6 (6%) 8,094.00 SGST6 (6%) 8,094.00 Total ₹1,51,088.00 Balance Due ₹1,51,088.00				
Authorized Signature									

Zoho Inventory – Tally Integration

Verify in Tally

Gateway → Display → Day Book

Voucher Type = Sales

Check:

- Party ledger
- Tax
- Amount

Tally Invoice Reference

Accounting Voucher Alteration (Secondary)		Serpent Trading Co			
Sales	No. 97	Tally Invoice		1-Feb-26 Sunday	
Particulars				Debit	Credit
By Mr Virat Kohli				1,51,088.00	
Cur Bal: 1,51,088.00 Dr					
To Sales					1,34,900.00
Cur Bal: 1,73,375.00 Cr					
Iphone 17 1 PCS 1,34,900.00					
To CGST6					8,094.00
Cur Bal: 7,488.00 Cr					
To SGST6					8,094.00
Cur Bal: 7,488.00 Cr					
Provide GST/e-Way Bill details : No					
Narration:				1,51,088.00	1,51,088.00
Invoice No: INV-000050					
<input type="button" value="Open"/> <input type="button" value="Print"/> <input type="button" value="Save"/> <input type="button" value="Accept"/> <input type="button" value="Delete"/> <input type="button" value="Cancel Vch"/> <input type="button" value="Help"/>					

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Bill Guide

ZOHO Bill

Create Vendor Bill → Approve → Sync

Zoho Bill
[Show PDF View](#)

Overdue

SerpentCS
Tamil Nadu
India
GSTIN 33AACZ4322M1ZA
91-9276006006
raj.m.serpentcs@gmail.com

BILL
Bill# B9007

Balance Due
₹70,000.00

Order Number : B9007
Bill Date : 01/02/2026
Due Date : 01/02/2026
Bill From
Mr. Rohit Sharma
Terms : Due on Receipt

#	Item & Description	HSN/SAC	Qty	Rate	Amount
1	Iphone 17		1.00 PCS	70,000.00	70,000.00
				Sub Total	70,000.00
				Total	₹70,000.00
				Balance Due	₹70,000.00

Authorized Signature _____

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Tally Bill

Tally → Purchase Voucher

Accounting Voucher Alteration (Secondary)		Serpent Trading Co			
Purchase	No. 23				
Supplier Invoice No.:	B9007	Date	:	1-Feb-26	
				Tally Bill	
					1-Feb-26
					Sunday
Particulars				Debit	Credit
To Mr Rohit Sharma					70,000.00
Cur Bal: 70,000.00 Cr					
By Finished Goods					70,000.00
Cur Bal: 70,007.00 Dr					
Iphone 17	1 PCS	70,000.00	70,000.00		
Provide GST/e-Way Bill details	:	No			
Narration:				70,000.00	70,000.00
Imported from Zoho Bill B9007					

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 Sync Verification Checklist

For every record:

- Record created in Zoho
- Workflow triggered
- Webhook log success
- Middleware log success
- Record visible in Tally
- Tally Reference ID updated in Zoho



Support & Contact Information

If you need assistance with the installation, configuration, or troubleshooting of the Zoho–Tally Integration module, please contact our support team.

Verticalis Support

Website: www.verticalisbs.com

Email: contact@verticalisbs.com

Support Scope Includes:

- Installation guidance
- Configuration assistance
- Middleware connection support
- Field mapping help
- Sync issue troubleshooting
- Upgrade & enhancement consultation

When contacting support, please include:

- Your organization name
- Module name
- Error screenshots
- Webhook logs (if available)
- Tally error messages (if any)

This helps us resolve your request faster.



Product & Documentation Resources

For the latest product information and updates, please refer to:

Product Page: [Zoho Inventory to Tally](#)

Documentation & Updates: [Zoho Inventory to Tally](#)

Zoho Inventory – Tally Integration

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Terms & Conditions

Use of this integration module and related middleware services is subject to Verticalis terms and licensing conditions.

Key Terms Summary:

- This integration is provided for business use only
- Redistribution or resale without permission is not allowed
- Custom modifications may affect support eligibility
- Third-party platform changes (Zoho / Tally / API providers) are outside our control
- Additional customization and connectors are billed separately unless included in the agreement

[Full Terms & Conditions](#)

Privacy & Data Policy

Verticalis does not store transactional data beyond what is required for integration processing and logging.

Policy Highlights:

- Data is processed only for integration purposes
- Credentials are encrypted where supported
- Logs may be retained for diagnostic purposes
- Customers are responsible for access control in Zoho, Tally, and middleware
- No business data is sold or shared with third parties

[Full Privacy Policy](#)

General Notes & Limitations

- Integration depends on Zoho Inventory, Tally, and API availability
- Field mappings must remain consistent after go-live
- Renaming ledgers/tax classes in Tally may break sync
- Deleting synced records is not recommended
- Always test configuration in staging before production use

Zoho Inventory – Tally Integration

- Webhook and workflow rules must remain enabled
- GST and tax mappings must be verified before financial sync

Change & Version Notice

This document is subject to updates without prior notice as the product evolves.

Always refer to the latest online documentation for:

- New features
- Mapping changes
- Compatibility notes
- Upgrade instructions



Disclaimer

This guide is provided for configuration and operational assistance only.

Actual behavior may vary depending on environment, customization, and third-party system changes.

Verticalis is not responsible for data inconsistencies caused by:

- Incorrect configuration
- Manual data edits after sync
- Third-party API changes
- Tally customization or TDL conflicts