

## Zoho Inventory – Tally Integration

### Installation, Configuration & User Guide

---

## 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.

## 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:

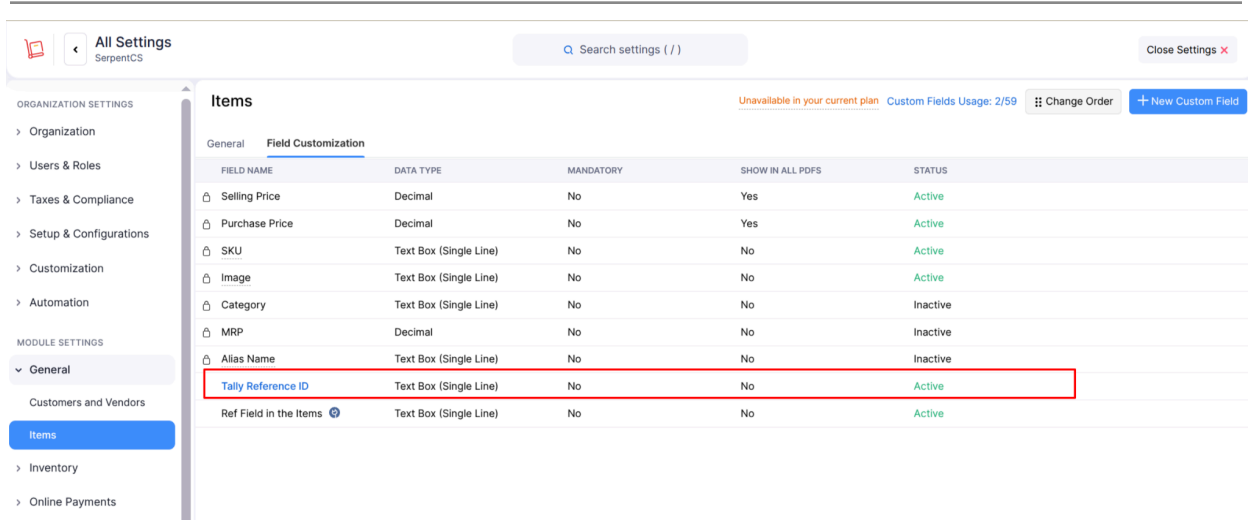
Settings → Module Settings → Select Module → Field Customization → New Custom Field

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.



**All Settings**  
SerpentCS

Search settings (/)

Close Settings x

Unavailable in your current plan Custom Fields Usage: 2/59 Change Order + New Custom Field

**Items**

General Field Customization

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
<b>Tally Reference ID</b>	Text Box (Single Line)	No	No	Active
Ref Field in the Items	Text Box (Single Line)	No	No	Active

ORGANIZATION SETTINGS

- Organization
- Users & Roles
- Taxes & Compliance
- Setup & Configurations
- Customization
- Automation

MODULE SETTINGS

- General
  - Customers and Vendors
  - Items**
  - Inventory
  - Online Payments

## 4 GST Setup

### Steps

Go to:

Settings → Taxes & Compliance → Taxes → GST Settings

Configure:

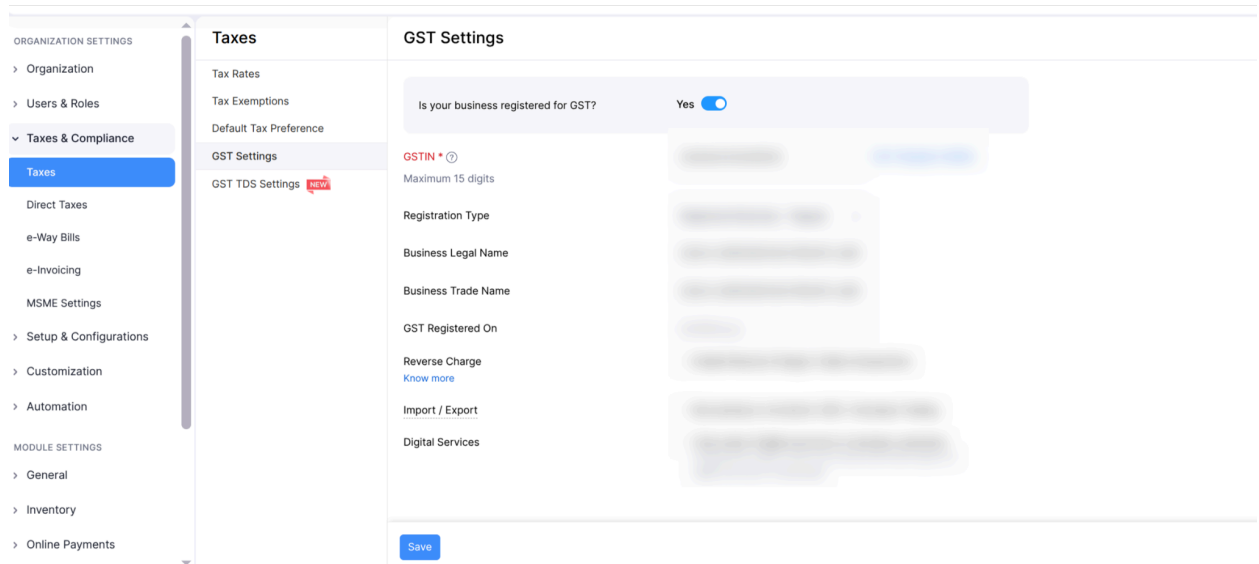
- GST Number
- Business Location
- Tax preferences

Click: Fetch GST Taxes

Verify the GST and configure as per the company policy.

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

## Zoho Inventory – Tally Integration



## 5 Enable Approvals (Optional but Recommended)

Used when you want approval before sending to Tally.

### Enable for:

- Invoice
- Bill

### Steps

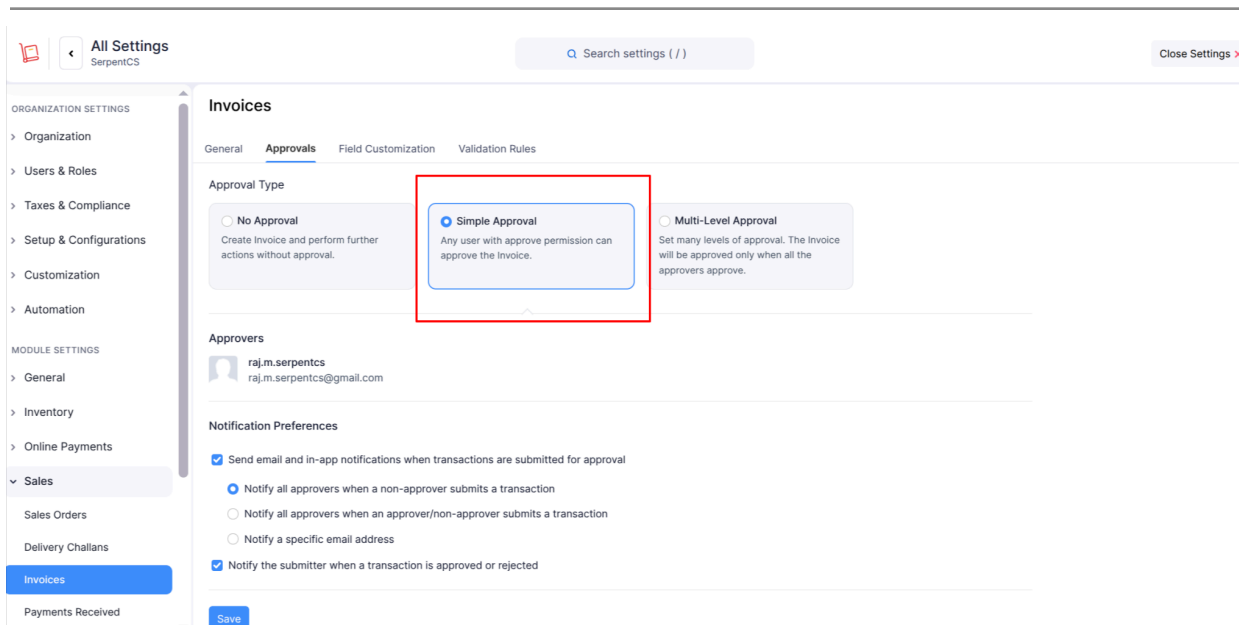
Settings → Module Settings → Select Module → Approvals

Select: Simple Approval

Define:

- Approver roles
- Approval condition (optional)

## Zoho Inventory – Tally Integration



## 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.

## Zoho Inventory – Tally Integration

[Verticalis](#) | [www.verticalisbs.com](http://www.verticalisbs.com) | [contact@verticalisbs.com](mailto:contact@verticalisbs.com) | Page 5

## Headers

Add:

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

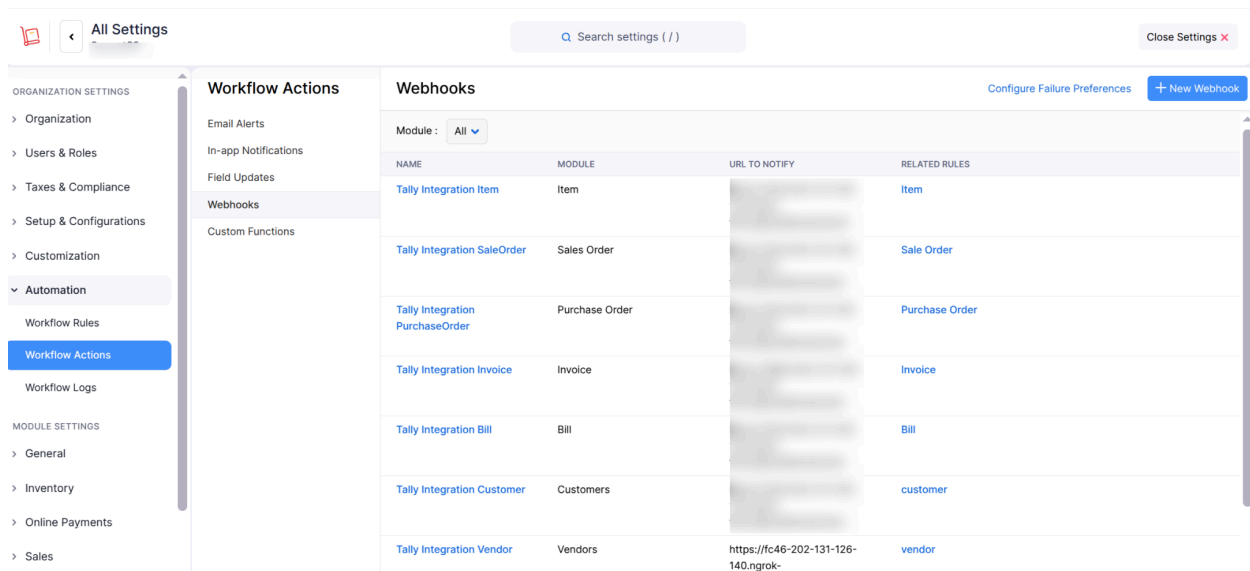
**Voucher\_Name** : <Tally Voucher Type> Sales or Purchase

## Example Voucher Names

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

(Adjust as per your Tally configuration)

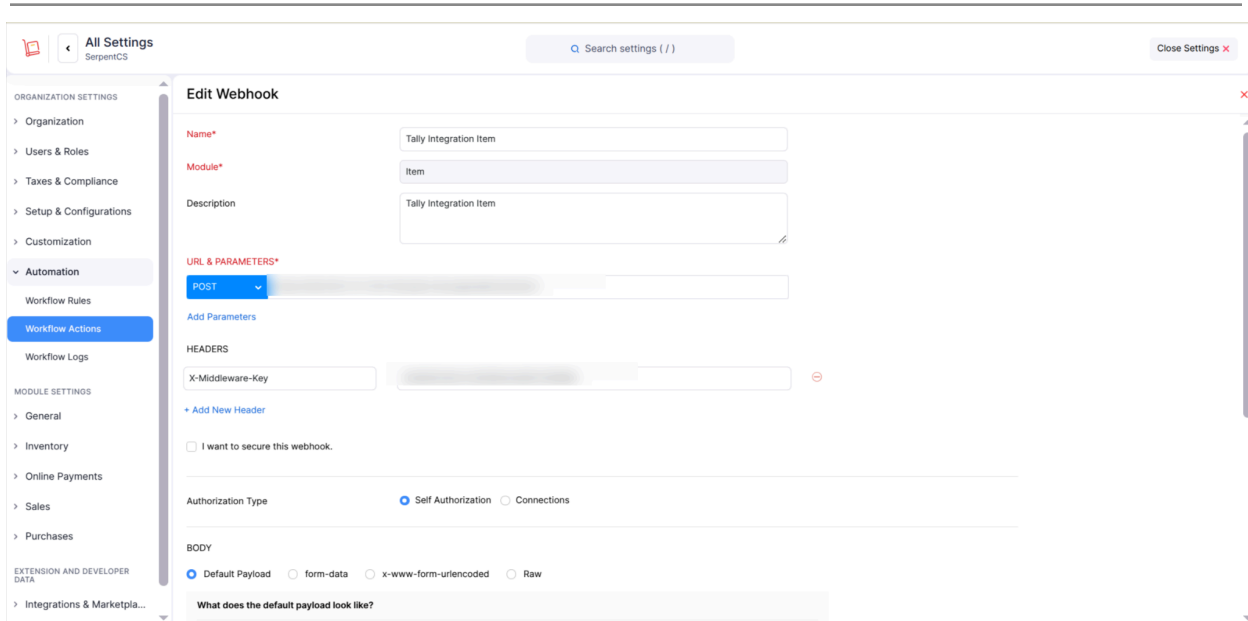
Save Webhook.



The screenshot shows the 'All Settings' page in Zoho Inventory. The left sidebar lists various settings categories, with 'Automation' expanded to show 'Workflow Actions'. The main content area is titled 'Webhooks' and includes a search bar and a '+ New Webhook' button. Below this is a table listing configured webhooks.

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

## Zoho Inventory – Tally Integration



## 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.

## Zoho Inventory – Tally Integration

## Criteria Example

Run only when:

- Status = Approved
- OR Status = Confirmed

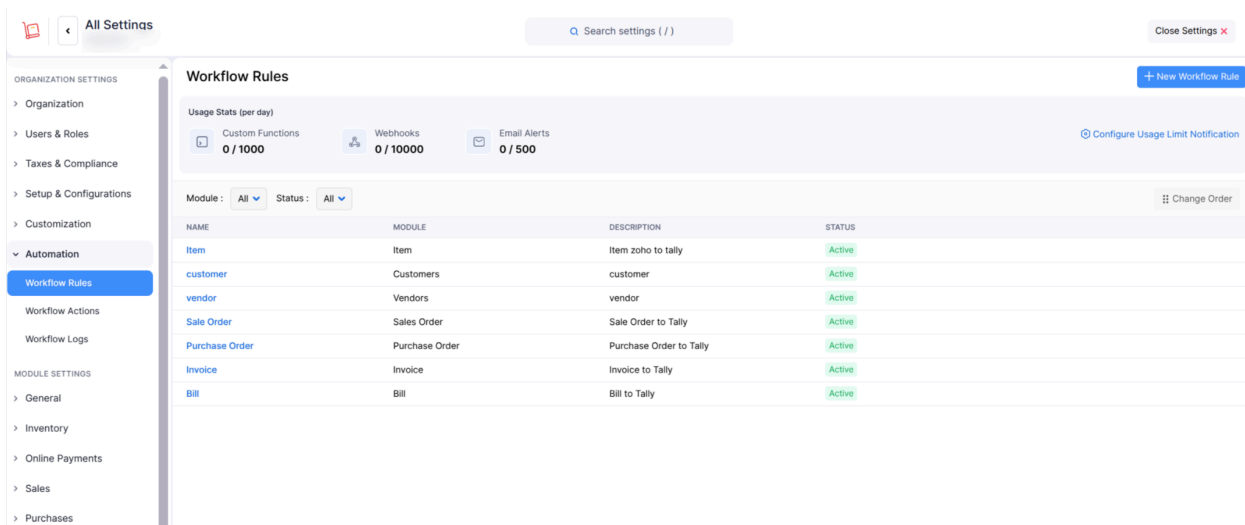
## Instant Action

Add: Webhook → Select created webhook

Save rule.

Repeat workflow setup for:

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



**Workflow Rules**

Usage Stats (per day)

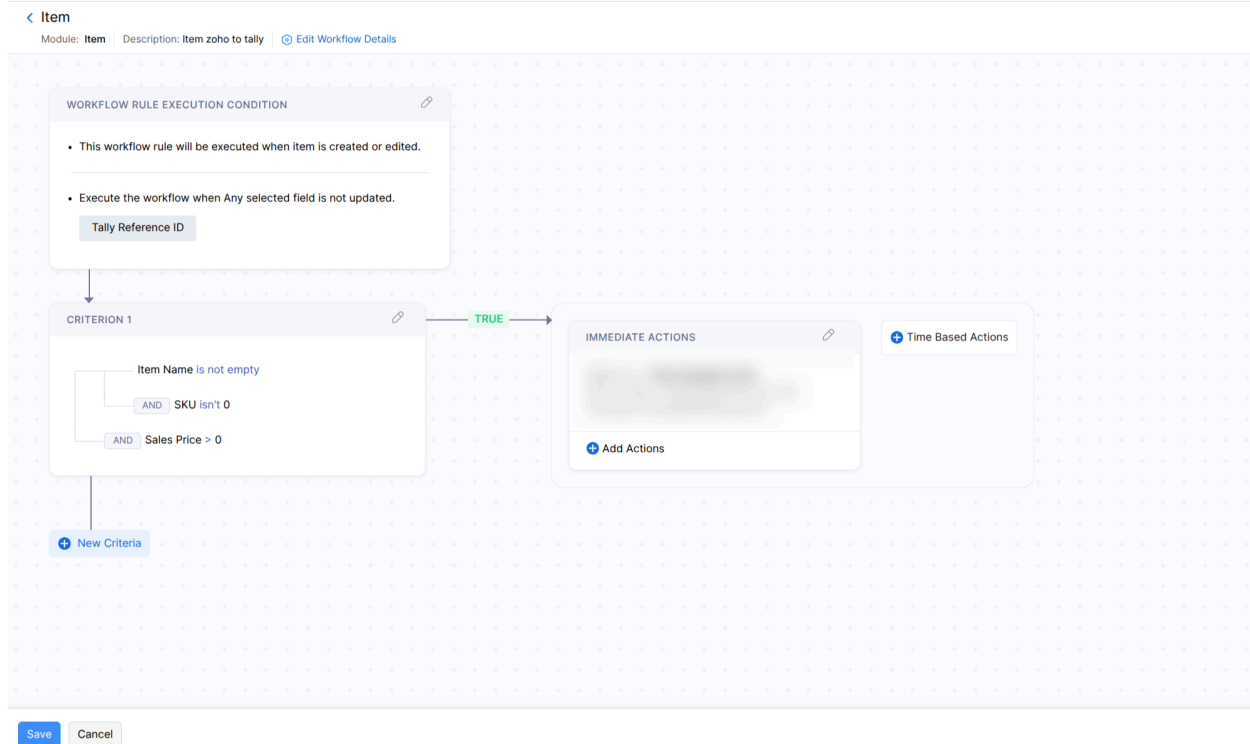
Custom Functions: 0 / 1000   Webhooks: 0 / 10000   Email Alerts: 0 / 500

Module: All   Status: All

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



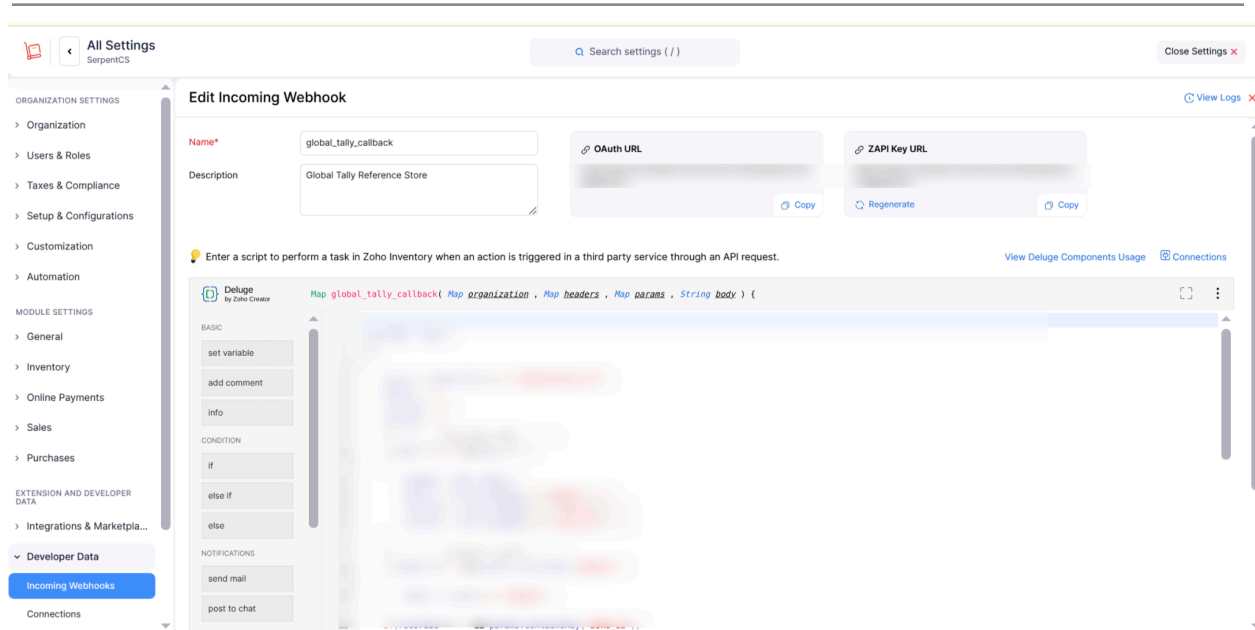


## 8 Middleware Tally Reference Storage Flow (Incoming Webhook)

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

 [Adjust Stock](#) [More](#) 

**Overview** Transactions History


Item Type	Inventory Items
Unit	PCS
Tally Reference ID	311446600000185001
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



Drag image(s) here or  
[Browse images](#)

① 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 ①

Stock on Hand	: 300.00
Committed Stock	: 0.00
Available for Sale	: 300.00

### Physical Stock ①

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

## Zoho Inventory – Tally Integration

## Tally Product Reference

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

## 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

## Zoho Inventory – Tally Integration

## 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

### Zoho Inventory – Tally Integration

[Verticalis](#) | [www.verticalisbs.com](http://www.verticalisbs.com) | [contact@verticalisbs.com](mailto:contact@verticalisbs.com) | Page 13

## Verify in Tally

Gateway → Accounts Info → Ledgers

### Tally Customer

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

Check the ledger created under the correct group.



## Vendor Sync Guide

Same as customer, but:


- Type = Vendor
- Group in Tally = Sundry Creditors

### ZOHO Vendor

Mr. Rohit Sharma

Edit 0 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

You can request your contact to directly update the GSTIN by sending an email. [Send email](#)

Payment due period

Due on Receipt

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.serpents

03/02/2026 03:45 PM

Contact person added

Contact person Rohit has been created by raj.m.serpents

## Zoho Inventory – Tally Integration

Verticalis | [www.verticalisbs.com](http://www.verticalisbs.com) | [contact@verticalisbs.com](mailto:contact@verticalisbs.com) | Page 15

<b>Ledger Alteration (Secondary)</b>		<b>Serpent Trading Co</b>	
Name : <b>Mr Rohit Sharma</b> (alias) :			
Under : <b>Sundry Creditors</b> <i>(Current Liabilities)</i>  Maintain balances bill-by-bill : <b>Yes</b> Default credit period : Check for credit days during voucher entry : <b>No</b>	<b>Mailing Details</b> Name : <b>Mr Rohit Sharma</b> Address :   State : <b>*Not Applicable</b> Country : <b>*Not Applicable</b>  <b>Banking Details</b> Provide bank details : <b>No</b>  <b>Tax Registration Details</b> PAN/IT No. : Registration type : GSTIN/UIN :		
<b>Opening Balance</b>		<b>( on 1-Apr-24 ) :</b> <span style="border: 1px solid black; background-color: yellow; display: inline-block; width: 100px; height: 20px;"></span>	





## 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 33AAACZ4322M1ZA  
91-9276006006  
raj.m.serpentcs@gmail.com

## TAX INVOICE

#	: INV-000050	Place Of Supply	: Tamil Nadu (33)
Invoice Date	: 01/02/2026		
Terms	: Due on Receipt		
Due Date	: 01/02/2026		

**Bill To**  
**Mr. Virat Kohli**

#	Item & Description	HSN/SAC	Qty	Rate	CGST		SGST		Amount
					%	Amt	%	Amt	
1	Iphone 17		1.00 PCS	1,34,900.00	6%	8,094.00	6%	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

X

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		

Quit

Accept

Delete

Cancel Vch

## Zoho Inventory – Tally Integration



## Bill Guide

### ZOHO Bill

Create Vendor Bill → Approve → Sync

#### Zoho Bill

Show PDF View ☒

Overdue

**SerpentCS**  
Tamil Nadu  
India  
GSTIN 33AAACZ4322M1ZA  
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  
Terms : Due on Receipt

Bill From  
**Mr. Rohit Sharma**

#	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 \_\_\_\_\_

## Zoho Inventory – Tally Integration

## 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 Cur Bal: 70,000.00 Cr		70,000.00
By Finished Goods Cur Bal: 70,007.00 Dr	70,000.00	
<div> <div>Iphone 17</div> <div>1 PCS</div> <div>70,000.00PCS</div> <div>70,000.00</div> </div>		
Provide GST/e-Way Bill details : No		
Narration: Imported from Zoho Bill B9007		
	70,000.00	70,000.00

## Zoho Inventory – Tally Integration

---

## 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](http://www.verticalisbs.com)

Email: [contact@verticalisbs.com](mailto: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

---

## 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

[Verticalis](#) | [www.verticalisbs.com](http://www.verticalisbs.com) | [contact@verticalisbs.com](mailto:contact@verticalisbs.com) | Page 23

- 
- 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