



A complete course plan



About

The Zoho Inventory training course is a two-day training program that aims to help an individual or a team learn how to set up, customize, and operate Zoho Inventory to meet the inventory-specific goals of their organization.

Who can attend?

Warehouse Managers, Stockists, Sales and Purchase Managers, Online Sellers, Retailers, Distributors, Zoho Partners and Resellers, and anyone who sets up and manages operations for any item-based SMB.

Agenda:

Day One - 4 Hours

Module 1: Introduction

- Zoho Inventory and the Zoho Finance Suite
- Why is Zoho Inventory important to SMBs?
- Terms used in Zoho Inventory



Module 2: Organization Setup

- Things to consider before setup
- Creating an organization
- Managing users and roles
- Adding warehouses and branches
- Setting up taxes and currencies
- Configuring preferences for each module
- Adding custom fields and views

Module 3: Product Workflow

- Types of items
- Stock keeping and valuation logic
- Methods of stock tracking
- Complete sales workflow
- Typical purchase workflow



Module 4: Items

- Creating an item group with attributes
- Defining items with serial numbers
- Capturing items with batch numbers and expiry dates
- Performing item adjustments
- Recording a non-inventory item or service
- Making a composite item
- Defining price lists for your items
- Transferring items between warehouses

Module 5: Importing data to Zoho Inventory

- Types of data that can be imported
- Order of importing data into Zoho Inventory
- How to prepare your organization for an import
- How to prepare an import file
- Integrating Zoho Inventory and Zoho Books
- Integrating Zoho Inventory and Zoho CRM



Module 6: Purchase Management

- Setting up a purchase approval workflow
- Adding vendors
- Drafting and emailing a purchase order
- Receiving goods into a designated warehouse
- Recording and tracking a vendor bill
- Managing reorders for your low stock items

Day Two - 4 Hours

Module 7: Sales Management

- Setting up a sales approval workflow
- Adding customers
- Choosing templates
- Drafting and emailing a sales order
- Using retainer invoices
- Converting a sales order into a tax invoice
- Creating one or more packages for an order
- Recording a manual shipment and delivery
- Setting up a sales order validation rule



Module 8: Returns

- Setting the criteria for product returns
- Adding and processing a sales return
- Receiving returned items back into a warehouse
- Raising a credit note and recording a refund

Module 9: Multi-channel Sales

- Integrating multiple Shopify stores
- Integrating Etsy
- Integrating eBay (only for US and UK editions)
- Integrating Amazon (only for US, CA, and UK editions)
- Mapping an online item to an existing item
- Processing online orders
- Other useful integrations

Module 10: Order Fulfillment

- Integrating shipping carriers
- Generating a shipment label for an order
- Back ordering
- Drop shipment



Module 11: Automation

- Adding custom email alerts and in-app notifications
- Setting up field updates
- Setting up webhooks
- Writing custom functions
- Setting up a scheduler to automate repetitive tasks

Module 12: Reporting

- A tour of reports
- Taking advantage of reporting tags
- Integrating Zoho Inventory with Zoho Analytics

