



Plug-in User Manual

ZSquared Connector for Zoho Inventory v4.0

IMPORTANT REQUIREMENTS:

- **Administrator**-level access to your WordPress website with WooCommerce installed
- WordPress 5 or greater with PHP 7 or greater
- Admin Access to your Zoho Inventory Settings and Organization Screen
- A basic understanding of WordPress Plugin Management
- If someone is managing your website for you, please forward this document to them

First, thank you for trying our plugin! This plugin allows your WooCommerce store to send orders to Zoho Inventory in real time.

The following pages provide the basic information required for setting up the ZSquared Connector for Zoho Inventory plugin. ZSquared plugins are [free to try](#) for a limited period; however, a subscription is required for continued connectivity through the ZSquared Data Connection Service. For support, you may email us at support@zsquared.ca.

Step One – Required Components

There are **FOUR** main components required to connect Zoho Inventory to your WooCommerce store:

- 1) The ZSquared Connector for Zoho Inventory plugin, installed on your WordPress site;
- 2) A valid subscription (trial or paid) to the ZSquared Data Connection Service
- 3) The Organization ID and Auth Token from your Zoho account
- 4) Your ZSquared Data Connection Service API Key

Refer to the sections that follow for instructions on how to obtain all of the above components.

Download and Install the ZSquared Plugin

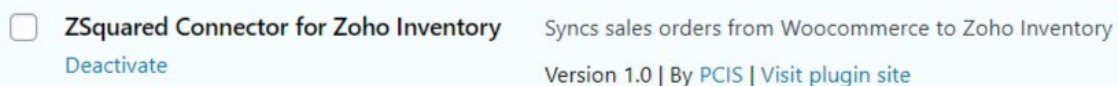
The ZSquared Connector for Zoho Inventory plugin is available for download from either <https://wordpress.org/plugins/> or through the Plugins Search within WordPress.

To install the plugin:

From WordPress.org: Search for the *ZSquared Connector for Zoho Inventory* plugin, and then click on the 'Install Now' button.

From WordPress: Download the *ZSquared Connector for Zoho Inventory* plugin and install using the 'Upload Plugin' function within the WordPress Plugin Manager.

Once installed, activate the plugin in WordPress.





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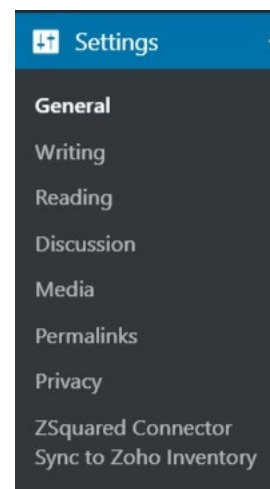
Access ZSquared Plugin Settings

ZSquared plugin settings are accessible under the **Settings** sub menu in the WordPress Admin sidebar. Select **“ZSquared Connector for Zoho Inventory”** to display plugin settings and configuration.

You are now ready to obtain your ZSquared Data Connection Service subscription (trial or paid), if you have not already done so. An active subscription is required to activate your connection to the ZSquared Data Connection Service. For your convenience, a link to sign up is provided on the ZSquared plugin settings page. Look for the *‘Sign up for a Connector API Key on the ZSquared Data Connection Service’* link.

If you already have an active subscription, you can login to your ZSquared Data Connection Service directly from the ZSquared plugin settings page by click on the link *‘Login to the ZSquared Data Connection Service here to see more information about your connection’*.

Once your subscription is active, you are ready to setup the ZSquared Data Connection Service.

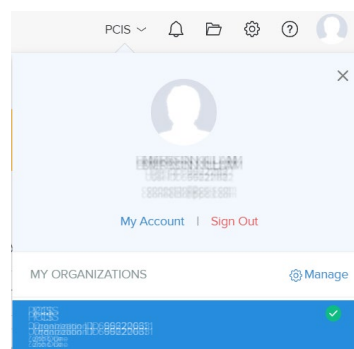


Setting up the ZSquared Data Connection Service

To use the plugin, a connection to the ZSquared Data Connection Service is required. Fortunately, a **free trial** is available to first time users, that will allow you to use the connection service without any limitations on functionality, for a limited period.

To set up your connection you will need the following information from your Zoho Inventory account:

Zoho Organization ID: Your Zoho Organization ID can be found under your user profile in Zoho. Click on your Profile icon in the top right corner of the screen, The Organization ID is immediately visible under “My Organizations” in the pull-down.



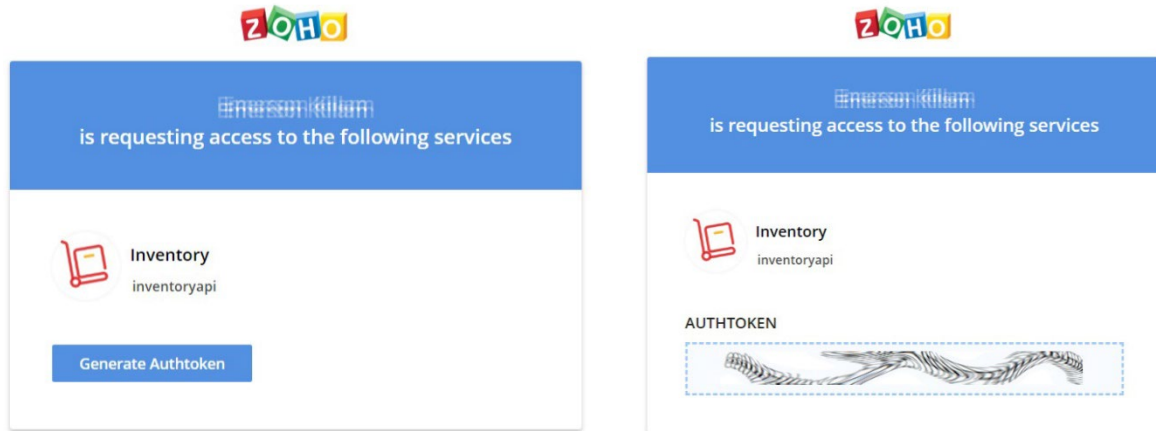


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Zoho Auth Token: You can generate a Zoho Auth Token by following this link:

<https://accounts.zoho.com/apiauthtoken/create?SCOPE=ZohoInventory/inventoryapi>



NOTE: Both of these two text strings are **required** in order to set up the ZSquared Data Connection Service. It will not operate otherwise.

Sign up for the ZSquared Data Connection Service

Proceed to <https://zsquared.ca/dcf/signup> to set up your account.

The image shows a screenshot of the ZSquared Data Connection Service sign-up form. The form is titled 'SIGN UP' and includes a 'Submit' button. The form fields are: First Name (Bob), Last Name (Testerson), Email (mister.mann@somewebsite.com), Password (*****), and Repeat Password (*****). There is a 'login here' link for existing users.



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Once logged in, proceed to add a new connection. This will define which website and which Zoho organization the system will connect together.

The screenshot shows the ZSquared dashboard with a navigation bar containing 'Z SQUARED', 'DASHBOARD', and 'CONNECTIONS'. Below the navigation bar is a section titled 'ADD A NEW ZHOHO INVENTORY CONNECTION'. A note states: 'Please note that you may not change the domain of your new connection unless there is an active subscription attached.' There is a link for 'Back to list'. The form contains the following fields:

Name	Big Jim Mcbob
Zoho Org ID	999888777
Zoho Auth Token	31637225001888
Domain (in the format "example.com")	yourstore.com

Below the form is a button labeled 'Create a new connection'.

Once a connection is successfully created, a *Connector API Key* is generated. You will use the *Connector API Key* to configure the plugin in WordPress.

The screenshot shows a connection details card with the following information:

- Name: Test Site
- Status: Trial (Expires 2020-04-08)
- Type: Zoho inventory
- API Key: 31637225001888
- Domain: 999888777

NOTE: The connection is set to respond to **ONE domain only**. If you have multiple stores/domains, you must create a separate connection for each store/domain. If the **Connector API Key** for a connection is used where the domain is mismatched, the service will not work.

All connections are editable after creation.



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Step Two – Connecting Your ZSquared Plugin to the ZSquared Data Connection Service

Once you have completed the steps outlined in *Step One – Required Components*, and obtained the all of the necessary information, return to your WordPress Administrator dashboard.

In WordPress Admin, select “Settings” and then click on the **ZSquared Connector for Zoho Inventory** link to take you to the configuration screen below.

Slack Documentation.' Below this note are two text input fields: 'Slack Channel' and 'Slack Webhook URL'. At the bottom of the form is a red 'Save Changes' button."/>

API Settings

Connector API Key *

WooCommerce Trigger Status *

When an order is updated to this WooCommerce status, the ZSquared connector will send the sales order to Zoho inventory.

Order Number Prefix

Order Numbers will be sent to zoho inventory in the format ZC-XXXX-DDMMYY

Slack Notification Settings (Optional)

Add settings here for error output and order summaries to be reported to your Slack channel. For more information, see [Slack Documentation](#).

Slack Channel

Slack Webhook URL

[Save Changes](#)

Required Settings

- 1) Enter the ZSquared Data Connection Service **Connector API Key** you obtained in Step One;
- 2) Specify the WooCommerce Trigger Status you wish to use to trigger the sending of an order to Zoho. Typically, this is the processing trigger, after payment through your payment gateway has completed successfully.
- 3) Specify the prefixes to be applied to your sales order when it is sent to Zoho. For instance, if you have a physical store along with your online store, you may want to use a prefix that is distinct for web sales (i.e., prefix WEB to your Zoho sales order records).



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Optional Settings

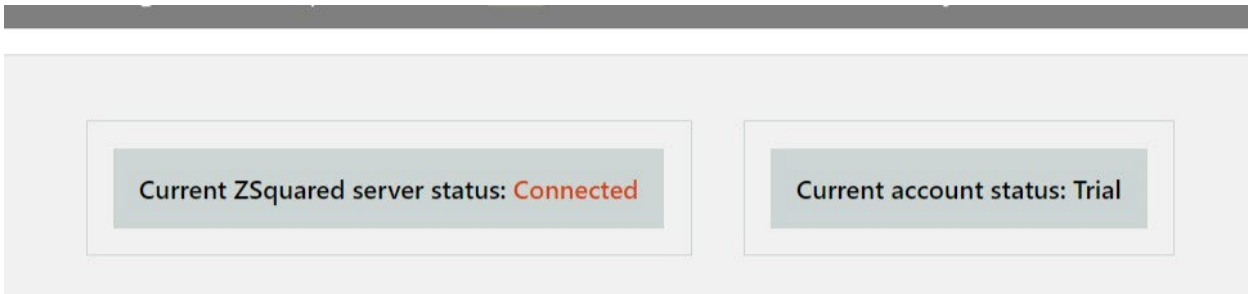
Slack

If you have a Slack account, you may wish to send a message when orders are placed to a web hook. You will need to know your channel name, as well as the URL for the web hook.

For more information on Slack webhooks visit:

<https://slack.com/intl/en-ca/help/articles/115005265063-Incoming-Webhooks-for-Slack>

Once you have entered your information, click **'Save Changes'**. The plugin will attempt to connect to the ZSquared Data Connection Service. If the connection is successful, the ZSquared Server Status will change to display **'Connected'** and the status of your subscription account will display on the right.



NOTE: *In the event the ZSquared Data Connection Service does not connect successfully, please check the following:*

- *The correct Connector API Key was used;*
- *Confirm both WordPress and the WordPress Hosting Firewall Connections are configured correctly;*
- *Verify that your ZSquared subscription account is active*
- *Verify all connections within your ZSquared account*

Step Three – Configuring Your Connection

To begin Step Three, ensure that you have an established connection with the ZSquared Data Connection Service as outlined in Step Two. This connection can be confirmed by verifying the ZSquared Server Status visible on initial tab of the plugin settings.

Note: *Configuration tasks may not operate correctly if the connection is inactive or if syncing tasks are shown in the status area. The status area is located on main Configuration tab.*



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Configuring your Connection entail three key steps:

- 1) Load / Synchronize products from Zoho Inventory to WooCommerce;
- 2) Set your Synchronization interval; and
- 3) Map Zoho Taxes to WooCommerce Taxes

Inventory Management

To synchronize your products from Zoho Inventory, the ZSquared Data Connection Service must access Zoho Inventory to obtain the products, SKUs and other information. The ZSquared Data Connection Service will obtain products from the DEFAULT warehouse only.

The screenshot shows a web interface with four tabs: Configuration, Inventory Management (selected), Replay Sales Orders, and Tax Settings. Under the 'Inventory Management' tab, there are two sections:

- Inventory Sync Settings (Optional)**: A section with the text 'Keep Woocommerce products up to date by automatically syncing changes from Zoho Inventory. Note that products will be updated every 24 hrs.' Below this are two checkboxes: 'Update price daily' and 'Update stock quantity daily', both of which are currently unchecked. A red 'Save Sync Settings' button is located below the checkboxes.
- Add/change Inventory Items (Optional)**: A section with the text 'Use the button below to add/update all products from zoho inventory to woocommerce.' Below this is a note: 'Note: Products will be created if their SKU is not already assigned to an existing Woocommerce Product; them synced using the settings above.' A red 'Add/Change now' button is located below the note.

Inventory Sync Settings (Optional)

- Select **Update price daily**, if you wish to update the stock price daily
- Select **Update stock quantity daily**, if you wish to update stock quantity daily

Note: Daily updates for price and quantity are done once daily at 3AM PST, through the ZSquared Data Connection Service



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Add/change Inventory Items (Optional)

The **Add/Change inventory items** function allows you to auto-populate your store with items from your Zoho Inventory's 'Actually Available for Sale' totals in the default warehouse.

As you add new items or change item information within Zoho Inventory, you can return to this feature to automatically add/update products.

*Notes: Below the **Add/Change Now** button, syncing information will appear with when syncing tasks are being performed.*

Tax Settings

Zoho inventory taxes have unique identifiers that need to be mapped to the taxes in WooCommerce. For this reason, you **cannot** use automatic taxation. The taxes within WooCommerce **must be set up manually** or through the import of a prepared tax .csv file. WooCommerce taxation should be configured **before** the plugin processes any orders.

For more on WooCommerce tax configuration follow this link:

<https://docs.woocommerce.com/document/setting-up-taxes-in-woocommerce/>

Mapping Taxes

Within the ZSquared Connector for Zoho Inventory plugin, click on the *Tax Settings* tab.

Left column: Displays the tax information set up within WooCommerce.

Right column: Displays the tax information set up within Zoho. These tax values are obtained when you click on the *Add/Update Items* button under the Inventory Management tab).

To map tax information, associate each WooCommerce tax entry to the corresponding Zoho tax entry.

WooCommerce Tax Entry	External Tax Entry
CA-BC (5.00%) GST	GST (5.00%)
US- (0.00%) Zero Tax	Tax Free (0.00%)

Note: You can have sales orders without tax, but if you create a new tax within WooCommerce, you will have to create the associated tax within Zoho. Then, synchronize and map the new tax before accepting new orders with this tax.



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Replaying Orders

There may be instances where an order is not transferred through to Zoho due to a misconfiguration, temporary interruption in service, or an expired subscription to the ZSquared Data Connection Service. When this occurs, you have the ability to replay order processing and manually send in transactions to Zoho. This is done through Reply Order tab. Enter the WooCommerce order number to target the appropriate order to send to Zoho.

Order replay succeeded.

Configuration Inventory Management **Replay Sales Orders** Tax Settings

Replay order submission

Sometimes an order may not make it into Zoho for a variety of reasons. When this happens, you can replay the order submission to try again.

Enter the woocommerce sales order number to attempt to send it again to zoho inventory, regardless of status.

Sales Order ID Number

Replay

Note: *That if replay does fail, ensure that the server and account status are correct, and that the order contains correct information, including a correctly mapped tax.*

Support

For basic support or feature requests, please send an email to support@zsquared.ca. We will do our best to respond within a few days. Subscribers to the ZSquared Data Connection Service will receive a priority response as well as additional WordPress and Zoho troubleshooting guidance.

Subscription

Access to the ZSquared Data Connection Service ensures you have a reliable connection from your WooCommerce store to Zoho. Subscribers also enjoy elevated support, regular news about new products, and early access to new features.

To view subscription pricing, visit: <https://zsquared.ca/pricing>