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# **Generate Sales Order in Zoho Books**

## **Installation & User Guide**



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## **Generate Sales Order in Zoho Books – Overview**

### **Purpose:**

This app enables seamless integration between Salesforce and Zoho Books, allowing users to generate Sales Orders in Zoho Books directly from Salesforce Opportunities. It ensures that all necessary data—Customers, Items, and Sales Orders—are accurately synced on button click.

---

### **Key Features**

#### **1. Customer Sync (Account → Zoho Contact)**

When generating a Sales Order, the app checks if the Salesforce Account associated with the Opportunity exists in Zoho Books as a Customer (Contact).

If the Customer does not exist, the app:

Automatically creates a Contact in Zoho Books using Account details (name, email, address, etc.).

Stores the Zoho Contact ID back on the Salesforce Account for future use.

#### **2. Product Sync (OpportunityLineItems → Zoho Items)**

For each Opportunity Line Item, the app:

Checks if the corresponding Product exists in Zoho Books.

If not, it creates the Item in Zoho Books with the required details (name, description, rate, etc.).

Ensures Products in Salesforce are always available in Zoho before creating the Sales Order.

#### **3. Sales Order Generation**

Once the Customer and all Items are confirmed to exist in Zoho Books:

The app creates a Sales Order in Zoho Books.

Associates it with the Zoho Contact and includes all synced items from the Opportunity.



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Some useful links: -

1. Registering New Client

Zoho API Console - <https://accounts.zoho.com/developerconsole>

2. Login Zoho Books Dashboard - <https://www.zoho.com/in/books/logout.html>



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## How Register New Client in Zoho Books: -

Click on link which I gave in above steps



Try smart sign-in

### Sign in

to access Accounts

Next

Sign in using



Don't have a Zoho account? [Sign up now](#)



### Passwordless sign-in

Move away from risky passwords and experience one-tap access to Zoho. Download and install OneAuth.

[Learn more](#)

If you have already Zoho books account so please sign in here otherwise click on 'Sign up now' button for create new account in Zoho books.



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After Successfully login you redirect this page

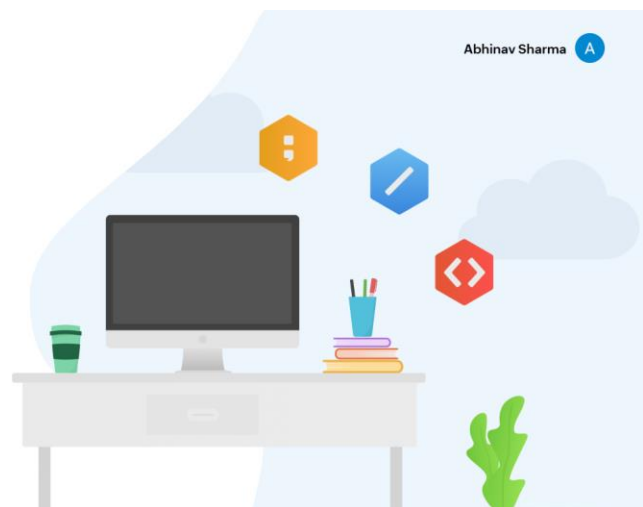


### Welcome to API Console!

The Zoho API Console provides you with OAuth credentials to help you build applications using Zoho APIs.

Get your OAuth credentials to start building applications.

[GET STARTED](#)



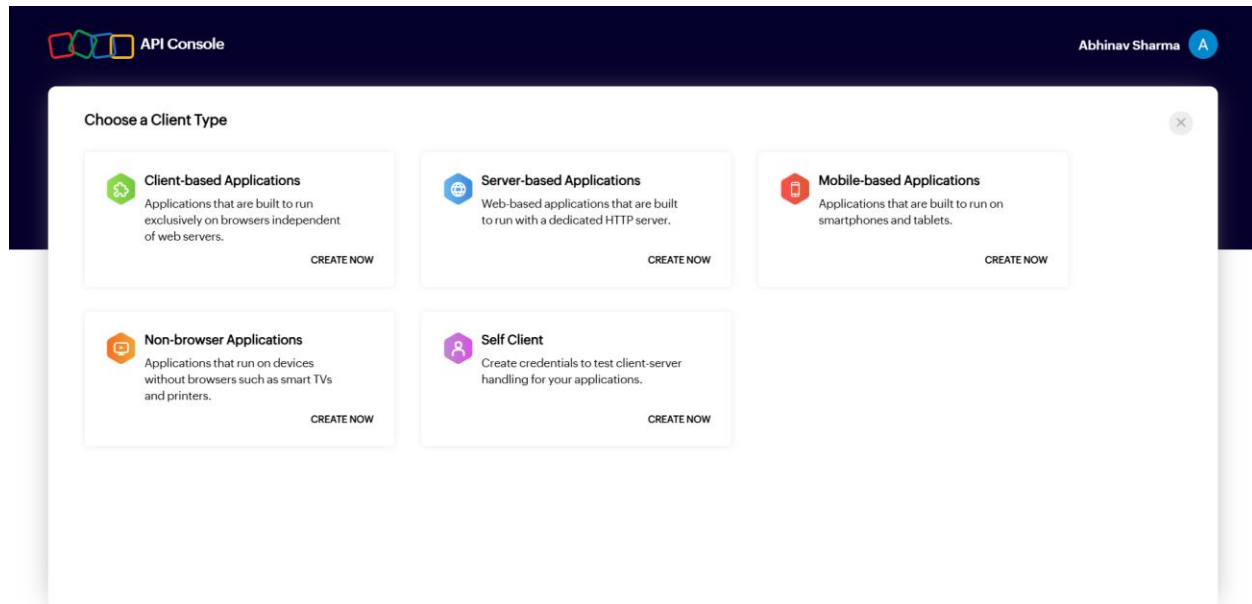
Click on GET STARTED button



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Now here registered yourself in Zoho Books.

I registered myself as a 'Self Client'.



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## Create New Client

Client Type

Self client



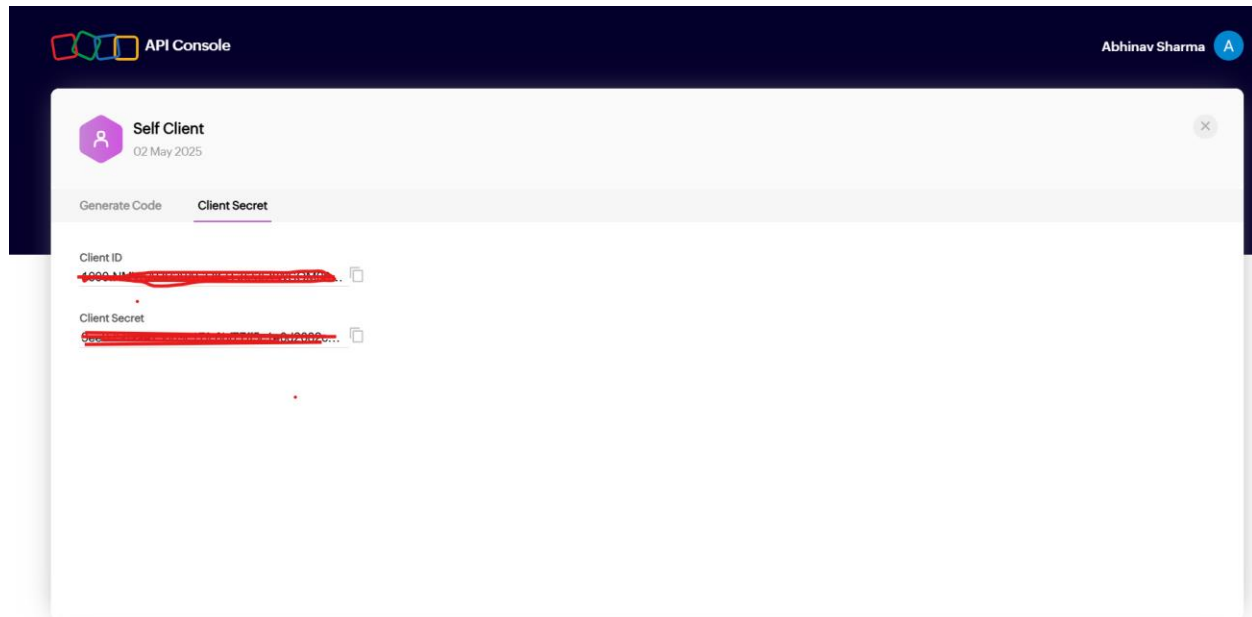
Credentials can be generated for testing and to handle server-to-server applications.

**CREATE**

Click on Create button.



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Here you can see I registered myself as a 'Self Client' and my Client ID and Client Secret is also generated they helps in future to generate Authorization code , Access Token and Refresh Token.





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**Self Client**

02 May 2025

**Generate Code**

**Client Secret**

Scope

Time Duration

3 minutes



Scope Description

**CREATE**

Here you can generate your Authorization code this code is valid for maximum 10 minutes.



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Scope – 'ZohoBooks.fullaccess.all'

Time Duration – 10 minutes

Scope Description – Test (here you can give any description but description is mandatory)



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**Self Client**

02 May 2025

**Generate Code**

**Client Secret**

Scope

ZohoBooks.fullaccess.all

Time Duration

10 minutes



Scope Description

Test

**CREATE**

Click on Create button

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## Generated Code



**Scope Name: ZohoBooks.fullaccess.all**

This code for the above scope is valid for only 10 minutes

1000.e3d597f136d90999a0522393bac61aca.07293b006...

COPY

DOWNLOAD

This is generated code.

### Create Remote site settings

Country	For Token Generation	For Create Sales Order
India	<a href="https://accounts.zoho.in">https://accounts.zoho.in</a>	<a href="https://www.zohoapis.in">https://www.zohoapis.in</a>
Australia	<a href="https://accounts.zoho.com.au">https://accounts.zoho.com.au</a>	<a href="https://www.zohoapis.com.au">https://www.zohoapis.com.au</a>
United States	<a href="https://accounts.zoho.com">https://accounts.zoho.com</a>	<a href="https://www.zohoapis.com">https://www.zohoapis.com</a>
Europe	<a href="https://accounts.zoho.eu">https://accounts.zoho.eu</a>	<a href="https://www.zohoapis.eu">https://www.zohoapis.eu</a>
Japan	<a href="https://accounts.zoho.jp">https://accounts.zoho.jp</a>	<a href="https://www.zohoapis.jp">https://www.zohoapis.jp</a>
Canada	<a href="https://accounts.zoho.ca">https://accounts.zoho.ca</a>	<a href="https://www.zohoapis.ca">https://www.zohoapis.ca</a>



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## **INSTALLATION STEPS FOR GENERATE SALES ORDER IN ZOHO BOOKS APP**

- Use these links to install the package into any organization:
  - Production Environment - [Click here for download App](#)
  - Sandbox Environment - [Click here for download App](#)
- Select one of the installation options as shown below and click on "**Install**" button.



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## Install Generate Sales Order in Zoho Books

By [www.xapdigital.com](http://www.xapdigital.com)

☐

Install for Admins Only

☒

Install for All Users

☐

Install for Specific Profiles...

> Advanced Options

Install

Cancel

### App Name

Generate Sales Order in Zoho Books

### Publisher

[www.xapdigital.com](http://www.xapdigital.com)

### Version Name

ver 3.0

### Version Number

3.0

### Additional Details

[View Components](#)



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- Wait till the App finish installing.



## Install Generate Sales Order in Zoho Books

By [www.xapdigital.com](http://www.xapdigital.com)



Installing and granting access to all Users...

App Name	Publisher	Version Name	Version Number
Generate Sales Order in Zoho Books	<a href="http://www.xapdigital.com">www.xapdigital.com</a>	ver 3.0	3.0

**Additional Details** [View Components](#)



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- Click on '**Done**' button once the installation is complete.



## Install Generate Sales Order in Zoho Books

By www.xapdigital.com



Installation Complete!

Done

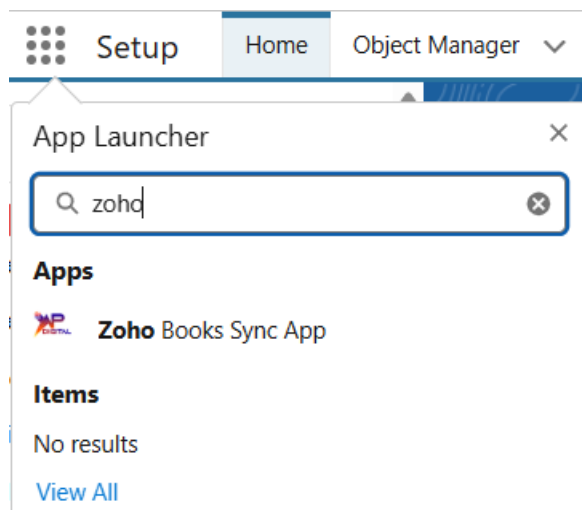
App Name	Publisher	Version Name	Version Number
Generate Sales Order in Zoho Books	www.xapdigital.com	ver 3.0	3.0





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After Installation the application click on App launcher and search 'Zoho Books Sync App'



Click on this Application

Now Application UI looking like this...



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The screenshot shows a web application interface for 'Connection Settings'. At the top, there's a navigation bar with 'Zoho Books Sync A...' and 'Connection Settings' (highlighted). Below the navigation bar, the 'Connection Settings' form is displayed. It contains the following fields: 'Select Country' (a dropdown menu), 'ORG ID' (a text input), 'Client ID' (a text input), 'Client Secret' (a text input), and 'Authorization Code' (a text input). A 'Submit' button is located at the bottom left of the form.

## **Give Necessary Permissions and Adding Fields on Page Layout: -**

### **Field Permissions**

### **Account Object: -**

Zoho Contact Id	Xapdigital_Zoho_Contact_Id__c	Text(254)
Zoho Sync Date/Time	Xapdigital_Zoho_Sync_Date_Time__c	Date/Time

Give Field level security permission on these fields for system admin and other profile which you use and if you want to see Zoho Customer ID and Zoho Customer Sync Date/Time then you can add these fields on Account layout otherwise no need.

### **Opportunity Object: -**

Zoho Sales Order ID	Xapdigital_Zoho_Sales_Order_ID__c	Text Area(255)
---------------------	-----------------------------------	----------------

Give Field level security permission on these fields for system admin and other profile which you use.

### **ZB SalesOrder Object: -**



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ZB SalesOrder

Xapdigital\_ZB\_SalesOrder\_c

Custom Object

Check field level security permission for all fields and object permission for this custom object.

### SalesOrder Lineltem Object: -

SalesOrder Lineltem

Xapdigital\_SalesOrder\_Lineltem\_c

Custom Object

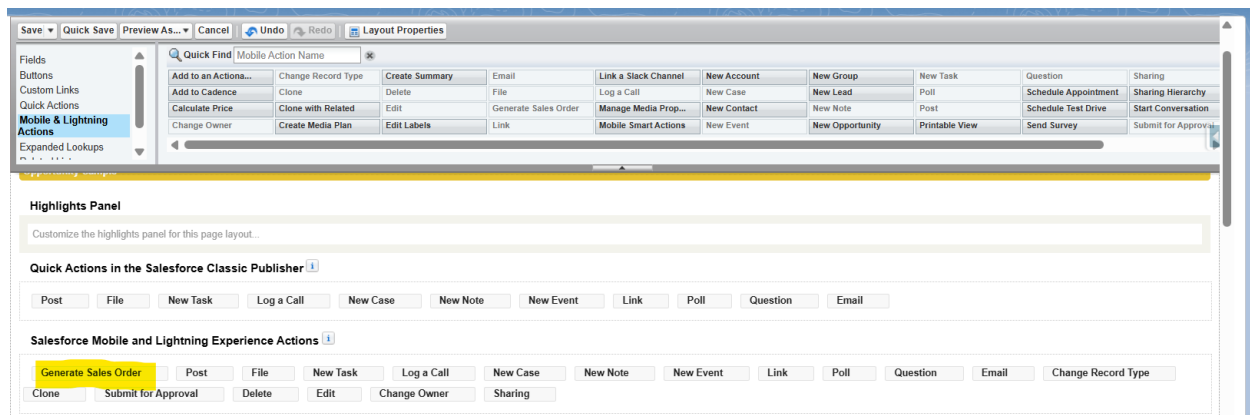
Check field level security permission for all fields and object permission for this custom object.

### Page Layout: -

On Opportunity object add custom action button on layout and also add ZB SalesOrder Object in related of opportunity.

### Opportunity Object: -

### Action Button: -





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Generate Sales Order

Generate\_Sales\_Order

Lightning Web Component

Add this button on page layout which page layout you are using.

### **ZB SalesOrder: -**

Add this object in related of opportunity.

The screenshot shows the Salesforce Lightning Web Component interface. At the top, there is a toolbar with buttons: Save, Quick Save, Preview As..., Cancel, Undo, Redo, and Layout Properties. Below the toolbar is a sidebar with a list of components: Buttons, Custom Links, Quick Actions, Mobile & Lightning Actions, Expanded Lookups, Related Lists (highlighted in yellow), and Report Charts. The main area displays a 'Quick Find' search bar with the text 'Related List Name'. Below the search bar is a grid of related lists. The grid has two columns: 'Related Content' and 'ZB SalesOrder'. The 'Related Content' column contains links to Activity History, Approval History, Campaign Influence, Cases, Competitors, Contact Roles, Content Deliveries, Files, Groups, Invoices, Messaging Sessions, Notes & Attachments, Open Activities, Orders, Partners, Products, Service Appointments, Stage History, and Voice Calls. The 'ZB SalesOrder' column contains a link to ZB SalesOrder. Below the grid is a section titled 'Related Lists'. It contains a table with one row: 'ZB SalesOrder'. The table has two columns: 'ZB SalesOrder Number' and 'Sample Text'. To the right of the table are buttons for 'New' and 'Change Owner'.

If you want add fields also in related then click on setting icon and add fields which you want.

### **ZB SalesOrder Object: -**

Add all Fields on Layout and add 'SalesOrder LineItem' object in related of ZB SalesOrder Object.



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SaveQuick SavePreview As...CancelUndoRedoLayout Properties

Fields

Buttons

Quick Actions

Mobile & Lightning Actions

Expanded Lookups

Related Lists

Quick FindField Name

SectionOpportunityZB SalesOrder Number

Blank SpaceOwner

Created BySalesOrder ID

Last Modified ByZB Customer Name

Actions in this section are currently inherited from the global publisher layout. You can [override the global publisher layout](#) to set a customized list of actions for the publisher on pages that use this layout.

**Salesforce Mobile and Lightning Experience Actions**

Actions in this section are predefined by Salesforce. You can [override the predefined actions](#) to set a customized list of actions on Lightning Experience and mobile app pages that use this layout. If you customize the actions in the Quick Actions in the Salesforce Classic Publisher section, and have saved the layout, then this section inherits that set of actions by default when you click to override.

**ZB SalesOrder Detail**

Standard Buttons

EditDeleteCloneChange OwnerChange Record TypePrintable ViewSharingSharing HierarchyEdit Labels

Custom Buttons

Information (Header visible on edit only)

★ ZB SalesOrder Number

Sample Text

Owner

Sample Text

ZB Customer Name

Sample Text

SalesOrder ID

Sample Text

Opportunity

Sample Text

System Information (Header visible on edit only)

Created By

Sample Text

Last Modified By

Sample Text

SaveQuick SavePreview As...CancelUndoRedoLayout Properties

Fields

Buttons

Quick Actions

Mobile & Lightning Actions

Expanded Lookups

**Related Lists**

Report Charts

Quick FindRelated List Name

Activity HistoryGroupsSalesOrder LineItems

Approval HistoryNotes & AttachmentsZB SalesOrder His...

Content DeliveriesOpen Activities

FilesRelated Content

**Mobile Cards (Salesforce mobile only)**

Drag expanded lookups and mobile-enabled Visualforce pages here to display them as mobile cards.

**Related Lists**

**SalesOrder LineItems**

NewChange Owner

Product Name	Quantity	Rate	Total
Sample Text	80,719	31.10	171.97

## SalesOrder Lineltem Object: -

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Save Quick Save Preview As... Cancel Undo Redo Layout Properties

**Fields**

- Buttons
- Quick Actions
- Mobile & Lightning Actions
- Expanded Lookups
- Related Lists
- Report Charts

Quick Find Field Name

Section	Owner	Total
Blank Space	Product Name	ZB SalesOrder
Created By	Quantity	
Last Modified By	Rate	

Publisher section, and have saved the layout, then this section inherits that set of actions by default when you click to override.

**SalesOrder LineItem Detail**

Standard Buttons: Edit Delete Clone Change Owner Change Record Type Printable View Sharing Sharing Hierarchy Edit Labels Custom Buttons

Information (Header visible on edit only)

Product Name	Sample Text	Owner	Sample Text
ZB SalesOrder	Sample Text	Quantity	10,176
Rate	783.37	Total	430.09

Add all fields on page layout.

### **How functionality is it works: -**

click on App launcher and search 'Zoho Books Sync App'



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Setup Home Object Manager

App Launcher

zohd

**Apps**

**Zoho Books Sync App**

**Items**

No results

[View All](#)

Click on this Application

XapDigital

Search...

Zoho Books Sync A... Connection Settings Accounts Opportunities

Connection Settings

Select Country  
Select an Option

ORG ID

Client ID

Client Secret

Authorization Code

Submit

Fill all input boxes every input box is required and make sure data is also correct. and don't worry this is one time process you have not to filled these things again because we stored these things in Salesforce backend.



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The screenshot shows a web interface for 'Zoho Books Sync A...'. At the top right is a search bar. Below the header, there are tabs: 'Connection Settings' (active), 'Accounts', and 'Opportunities'. The 'Connection Settings' section contains the following fields:

- Select Country: India
- ORG ID: [Redacted]
- Client ID: [Redacted]
- Client Secret: [Redacted]
- Authorization Code: [Redacted]

A 'Submit' button is located at the bottom left of the form.

Filled all data and clicked on 'Submit' button.

For ORG ID – through this link <https://www.zoho.com/in/books/logout.html> login your account and click on 9 dots and open book. Check your profile in here you see Org and User Id.





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'Token saved successfully' in backend but this access token is valid for one hour means 60 Minutes and 'Expire Access Token Time' is shows when your access token is expired. But we can regenerate access token with the help of 'Refresh Token' for this we gave one batch in our Package but you need to write scheduler for this.

### **Scheduler for regenerate access token through refresh token: -**

- Click on setup
- Search '**Scheduled Jobs**' quick find box then clicks on it.
- Click on '**Schedule Apex**'.
- Give Job Name and Select Apex class from lookup.
- Schedule a batch on every hour.



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SETUP

## Apex Classes

### Schedule Apex

Schedule an Apex class that implements the Schedulable interface to be automatically executed on a specified interval.

SaveCancel

Job Name

ZohoSyncBatch

Apex Class

ZohoSyncBatchScheduler

Schedule Using

☐ Schedule Builder

☒ Cron Expression

Cron Expression

0 0 \* \* \* ?

Exact start time will depend on job queue activity.

SaveCancel

Action	Job Name ↑	Submitted By	Submitted	Started	Next Scheduled Run
<a href="#">Manage</a>   <a href="#">Del</a>   <a href="#">Pause Job</a>	ZohoSyncBatch	Digital User_Xap	02/05/2025, 4:38 pm		02/05/2025, 5:00 pm

**Now we Create data in Zoho Book: -**



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The screenshot shows the 'Xap Digital Opportunity' form in Zoho Books. The form is titled 'Opportunity' and 'Xap Digital Opportunity'. It includes fields for Account Name (Xap Digital Account), Close Date (02/05/2025), Amount (₹60,000.00), and Opportunity Owner (Xap Digital User). The form is divided into sections: Activity, Details, and Chatter. The 'Details' section contains fields for Opportunity Owner, Amount, Private, Expected Revenue, Opportunity Name, Close Date, Account Name, Next Step, Type, Stage, and Lead Source. The 'Related' section shows 'ZB SalesOrder (0)' and 'Products (1)'. The 'Generate Sales Order' button is located in the top right corner of the form.

Account and Product is mandatory for create sales order in Zoho Books. This is my opportunity and on Opportunity I have associated Account and Product (Opportunity Line Item).

Click on 'Generate Sales Order' button.

The screenshot shows a confirmation message dialog box. The message text is: "A SalesOrder will be generated in Zoho Books for this opportunity. Do you want to continue?". There are two buttons: "Yes" and "No". The dialog box is overlaid on the 'Xap Digital Opportunity' form.

This is a confirmation message. Then Click on 'Yes' Sales Order is created in Zoho Books and If you click on 'No' the confirmation pop-up is closed.



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Sales Order is Created in Zoho Books.

SO-00078 [Upload files](#) [Comments & History](#) ✕

[Edit](#) [Email](#) [PDF/Print](#) [Mark as Confirmed](#) ⋮

Draft

**PISoftek**  
Uttar Pradesh  
India  
abhinavaimtian@gmail.com

Bill To

[Xap Digital Account](#)

#	Item & Description	Qty	Rate	Amount
1	XapDigital Product This is XapDigital Product.	3.00	20,000.00	60,000.00
Sub Total				60,000.00
Total				₹60,000.00

Authorized Signature \_\_\_\_\_

## SALES ORDER

Sales Order# SO-00078

Order Date : 02/05/2025

Ref# : Xap Digital Opportunity

Associated Account and Product is also Created in our Zoho Books.



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Xap Digital Account

Edit

0

New Transaction

More

X

Overview

Comments

Transactions

Mails

Statement

Xap Digital Account

There is no primary contact information. [Add New](#)

ADDRESS

Billing Address

No Billing Address - [New Address](#)

Shipping Address

No Shipping Address - [New Address](#)

OTHER DETAILS

Customer Type

Business

Default Currency

INR

Portal Status

Disabled

Source

API

Customer Portal allows your customers to keep track of all the transactions between them and your business. [Learn More](#)

Enable Portal

Payment due period

Due on Receipt

Receivables

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

[Enter Opening Balance](#)

Income

This chart is displayed in the organization's base currency.

Last 6 Months

Accrual

5 K

4 K

3 K

2 K

1 K

0

Nov 2024

Dec 2024

Jan 2025

Feb 2025

Mar 2025

Apr 2025

May 2025

Total Income ( Last 6 Months ) - ₹0.00

02/05/2025

Sales Order added

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## XapDigital Product

 More ▾ 

**Overview** Transactions History

Item Type Sales Items

Created Source API

### Sales Information

Selling Price ₹20,000.00

Sales Account Sales

Description This is XapDigital Product.

Zoho Books Data Saved return in Salesforce.



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Zoho Books Sync A...

Connection Settings

Accounts

Opportunities

\* XapDigital Product | Product

X

ZB SalesOrder  
SO-00078

Related

Details

ZB SalesOrder Number  
SO-00078

ZB Customer Name  
Xap Digital Account

Opportunity  
[Xap Digital Opportunity](#)

Created By  
 Xap Digital User, 02/05/2025, 4:54 pm

Owner  
 Xap Digital User

SalesOrder ID  
2486028000000188001

Last Modified By  
 Xap Digital User, 02/05/2025, 4:54 pm

Zoho Books Sync A...

Connection Settings

Accounts

Opportunities

\* XapDigital Product | Product

X

ZB SalesOrder  
SO-00078

Related

Details

SalesOrder LineItems (1)

New

Product Name	Quantity	Rate	Total
<a href="#">XapDigital Product</a>	3	20,000.00	60,000.00
<a href="#">View All</a>			



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# Thank You