

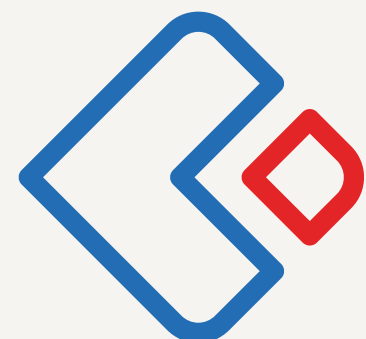


ZOHO CREATOR INVENTORY PROCUREMENT & SALES AUTOMATION

ZOHO CREATOR

Retail Supply Chain & Order Fulfillment System

Presented By
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Zoho
Creator

CLIENT & PROJECT OVERVIEW

The client is a retailer (LILI D.O.O.) managing apparel inventory (cycling costumes, bras, etc.) and sales. They required a custom system to automate the process from supplier invoicing to final customer order fulfillment.

Vision

To build a centralized, real-time Zoho Creator application to: * Automate Supplier Invoice data entry. * Maintain accurate, real-time stock levels based on SKU (Brand + Model). * Manage Inbound (Add) and Outbound (Sales/Remove) inventory flows. * Simplify Customer Order processing and stock deduction.

KEY CHALLENGES

- Manual Invoice Processing: Supplier invoices arriving via email required manual data extraction and entry.
- Inaccurate Stock Levels: Stock was managed outside the system, leading to discrepancies between physical and recorded inventory.
- Complex Stock Logic: Difficulty managing stock updates (addition/subtraction) for unique SKUs.
- Slow Fulfillment: Customer order processing was disconnected from actual stock availability.

MY SOLUTION

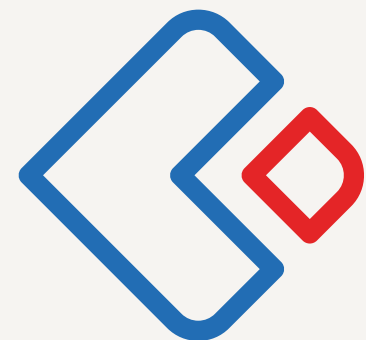


A robust Zoho Creator app integrated with Make.com (Integromat) for procurement, built around a central Warehouse module and detailed Log tracking.





CORE MODULES



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CORE MODULES

- **Supplier Invoices:** Automated data entry from email.
- **Warehouse:** Centralized inventory master record (with Stock/Cost).
- **Prezem (Add Inventory):** Form for logging incoming stock.
- **New Lili Sales / Customer Order / Remove Inventory:** Forms for managing stock outflow.
- **Logs:** Detailed record of every stock movement (In/Out).

SUPPLIER INVOICE AUTOMATION

- **Email-to-Creator:** Make.com integration extracts invoice data (Contact, Items) from incoming supplier emails.
- **Webhooks Integration:** The data is converted to JSON and sent via Webhook to instantly create a record in the Supplier Invoice form.

Invoice ID	Invoice Number	Supplier Name	Date	Due Date	Total Amount	Added Time	Modified Time	Link Invoice
16	04090	Empreinte	30-Nov-2025	29-Nov-2025	€ 200.00	28-Nov-2025 20:30:13	29-Nov-2025 09:53:18	
4	INV-001	test supplier	25-Nov-2025	28-Nov-2025	€ 1,000.00	17-Nov-2025 14:09:19	17-Nov-2025 14:09:19	
10	1231234	JOLI d.o.o.	17-Nov-2025	17-Nov-2025	€ 123.00	17-Nov-2025 20:03:22	17-Nov-2025 20:04:00	
15	04083089	Anita	30-Nov-2025	30-Nov-2025	€ 400.00	28-Nov-2025 20:22:46	29-Nov-2025 10:01:02	
18	121212	JOLI d.o.o.	03-Nov-2025	19-Nov-2025	€ 114.56	29-Nov-2025 17:01:11	29-Nov-2025 17:03:21	
17	asasd	Anita	03-Nov-2025	07-Nov-2025	€ 123.00	29-Nov-2025 16:39:27	29-Nov-2025 16:40:08	
14	eeeeee	Empreinte	12-Nov-2025	13-Nov-2025	€ 112.00	28-Nov-2025 18:22:32	28-Nov-2025 18:23:08	
13	123123123123	JOLI d.o.o.	19-Nov-2025	20-Nov-2025	€ 1,234.00	19-Nov-2025 22:27:40	19-Nov-2025 22:28:39	
12	676767	Anita	19-Nov-2025	21-Nov-2025	€ 800.00	18-Nov-2025 12:43:25	18-Nov-2025 12:45:29	
11	22323	Anita	19-Nov-2025	13-Nov-2025	€ 1,000.00	18-Nov-2025 12:34:21	18-Nov-2025 12:36:25	
1	123	Anita	05-Nov-2025	05-Nov-2025	€ 24.95	06-Nov-2025 08:11:14	18-Nov-2025 12:26:51	
9	123 test	JOLI d.o.o.	17-Nov-2025	19-Nov-2025	€ 122.00	17-Nov-2025 19:56:55	17-Nov-2025 20:02:21	
8	2006	Anita	18-Nov-2025	12-Nov-2025	€ 500.00	17-Nov-2025 17:21:45	17-Nov-2025 17:22:24	
7	0909	Anita	19-Nov-2025	22-Nov-2025	€ 1,572.59	17-Nov-2025 17:19:54	17-Nov-2025 17:20:47	

PREVZEN (INVENTORY RECEIPT)

- **Supplier Selection & Auto-Fill:** User selects the Supplier Invoice, and data automatically fills the form.
- **SKU Lookup & Costing:** In the subform (Brand + Model \rightarrow SKU), the app checks the Warehouse for existing SKU. If found, the existing Cost is auto-filled.
- **Stock Update Logic:** Upon submission, Workflows check if the SKU exists in the Warehouse. If yes, it updates (adds) the Stock and Cost. If not, a New Warehouse record is created.

LILI d.o.o.

Add Inventory

Prevezem ID

Datum Prevezema *

Invoice Number *

Invoice Status

Supplier Name

Date

Due Date

Invoice Total Amount

Line Items *

*Brand	*Model	SKU	*Cost Per Item	*Qty	Discount	Line Total
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Total Line Items

CUSTOMER ORDERS & OUTFLOW

- **New Lili Sales / Remove Inventory:** Dedicated forms manage stock outflow, checking the SKU and deducting the quantity from the Warehouse record via Workflows.
- **Customer Order Form (Main Sales):** This detailed form (as shown in screenshot) captures client info and line items via a subform.
- **Stock Deduction Button:** A dynamic button is visible on the Customer Order Report. When clicked, it triggers a Workflow to deduct stock from the Warehouse records for all line items.

The screenshot displays the 'All Customer Orders' report in Zoho Creator. The interface includes a sidebar with navigation options like 'Invoices', 'Prezem', 'LILI Sale New', 'Add New Inventory', 'Remove Inventory', 'YB', 'Customer Order', 'Master Tables', and 'Client Details'. The main table lists orders with the following data:

<input type="checkbox"/>	Remove Stock From Warehouse	Customer profile	Client Na...	Payment Sta...	Order Date	Total Cost	Phone Number	Shipping Address	
<input type="checkbox"/>	<input type="checkbox"/>	Draft							
<input type="checkbox"/>	<input type="checkbox"/>	Deduct Stock From Warehouse Inventory	Open Dashboard	Usama	Not Paid	25-Nov-2025	146.77	+923477239518	Badami Bagh Khoker Road, Lahore, Punjab, 54000, P
<input type="checkbox"/>	<input type="checkbox"/>	Deduct Stock From Warehouse Inventory	Open Dashboard	elena	Not Paid	26-Nov-2025	2318.40	+38670263425	Celjska cesta 6, Rogaška Slatina, 3250
<input type="checkbox"/>	<input type="checkbox"/>	Try at home							
<input type="checkbox"/>	<input type="checkbox"/>	Deduct Stock From Warehouse Inventory	Open Dashboard	Yonatan	Not Paid	24-Nov-2025	9375.41	+923096943577	Bloch Bauer Promenade 6, 1100
<input type="checkbox"/>	<input type="checkbox"/>	Final items decided							
<input type="checkbox"/>	<input type="checkbox"/>	Deduct Stock From Warehouse Inventory	Open Dashboard	Yonatan		22-Nov-2025	4096.72	+9234773239518	Bloch Bauer Promenade 6, 1100
<input type="checkbox"/>	<input type="checkbox"/>	Deduct Stock From Warehouse Inventory	Open Dashboard	Usama	Not Paid	29-Nov-2025	434.69	+923477239518	Badami Bagh Khoker Road, Lahore, Punjab, 54000, P
<input type="checkbox"/>	<input type="checkbox"/>	Closed							
<input type="checkbox"/>	<input type="checkbox"/>	Deduct Stock From Warehouse Inventory	Open Dashboard	Yonatan	Not Paid	25-Nov-2025	146.04	+38670263425	Celjska cesta 6, 3250
<input type="checkbox"/>	<input type="checkbox"/>	Deduct Stock From Warehouse Inventory	Open Dashboard	Yonatan	Not Paid	22-Nov-2025	1432.80	+923477239518	Bloch Bauer Promenade 6, 1100
<input type="checkbox"/>	<input type="checkbox"/>	Deduct Stock From Warehouse Inventory	Open Dashboard	elena	Paid	30-Nov-2025	735.66	+38670263425	Celjska cesta 6, Rogaška Slatina, 3250
<input type="checkbox"/>	<input type="checkbox"/>	Deduct Stock From Warehouse Inventory	Open Dashboard	elena	Not Paid	30-Nov-2025	1476.77	+38670263425	Celjska cesta 6, Rogaška Slatina, 3250
<input type="checkbox"/>	<input type="checkbox"/>	Deduct Stock From Warehouse Inventory	Open Dashboard	Yonatan		25-Nov-2025	427.19	+38670263425	Celjska cesta 6, 3250

LOGGING & DASHBOARD

- **Audit Trail:** Every stock change (inflow from Prevezem, outflow from Sales/Remove) creates a detailed Log Entry record (status IN or OUT).
- **Order Dashboard:** A button on the Customer Order report opens a Dashboard (Page) that displays the full client history, details, and associated order list.

Action	SKU	Cost Per Item	Qty	Invoice Number	Reasons	Added Time	Modified Time	Status	ID
OUT	Anita (1100)	€ 136.92	10			30-Nov-2025 00:57:15	30-Nov-2025 00:57:15		213226000001065032
OUT	Anita (0640X)	€ 59.76	2			30-Nov-2025 00:57:15	30-Nov-2025 00:57:15		213226000001065030
In	Empreinte (10226)	€ 78.00	1	121212		29-Nov-2025 17:03:21	29-Nov-2025 17:03:21		213226000001048299
In	Anita (0640X)	€ 20.00	2	121212		29-Nov-2025 17:03:21	29-Nov-2025 17:03:21		213226000001048301
In	Anita (1100)	€ 59.00	5		Customer Return	29-Nov-2025 16:41:52	29-Nov-2025 16:41:52		213226000001048190
In	Anita (0640X)	€ 24.95	5		Customer Return	29-Nov-2025 16:41:52	29-Nov-2025 16:41:52		213226000001048188
Out	Anita (0640X)	€ 24.95	5		Adjustment Zaloga	29-Nov-2025 16:41:13	29-Nov-2025 16:41:13		213226000001048171
In	Anita (1100)	€ 59.00	2	asasd		29-Nov-2025 16:40:08	29-Nov-2025 16:40:08		213226000001048156
In	Anita (1100)	€ 56.60	5		Credit Note	29-Nov-2025 16:38:46	29-Nov-2025 16:38:46		213226000001048138
Out	Anita (1100)	€ 56.60	2		LILI Sale	29-Nov-2025 16:35:13	29-Nov-2025 16:35:13		213226000001048114
In	Anita (0640X)	€ 24.95	16	04083089		29-Nov-2025 10:01:02	29-Nov-2025 10:01:02		213226000001053143
In	Anita (1100)	€ 56.60	10		LILI Sale	29-Nov-2025 09:52:46	29-Nov-2025 09:52:46		213226000001053130

Customer Details

Name: **Usama**
Email: samaaayyy00@gmail.com
Phone: +923477239518
Address: Badami Bagh Khoker Road, Lahore, Punjab, 54000, Pakistan

1 Orders in Draft
0 Orders that the customer has taken home for try
1 Orders whose status is Final Item Decided
0 Closed Orders

Order Number	Order Status	Payment Status	Total Cost	Stock Deducted
9	Final Items decided	Not Paid	434.69	false
6	Draft	Not Paid	146.77	false

IMPACT & OUTCOME

- **80% Time Saved** in manual invoice processing and stock entry due to Make.com integration.
- **Real-Time Inventory Accuracy:** Warehouse module provides single source of truth for all SKUs, eliminating stock discrepancies.
- **Clear Audit Trail:** Detailed Log entries provide complete transparency on every stock movement.
- **Streamlined Sales Fulfillment:** Customer Order process is tightly integrated with stock levels, ensuring quicker order processing.

TOOLS & SKILLS USED

- **Zoho Creator**
- **Deluge scripting**
- **Custom buttons, forms, subforms**
- **Automation and business logic design**

LET'S WORK TOGETHER

USAMA AHMED

CERTIFIED ZOHO DEVELOPER

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