

ZOHO CRM

Inventory Templates

Help Guide

Created By

GOLDENLION

zoho@glionconsulting.com

TABLE OF CONTENTS

| | |
|--|----|
| 1. Introduction | 3 |
| 2. How to Install the Templates | 4 |
| 2.1. Choose Templates | 4 |
| 2.2. Proceed to Checkout | 5 |
| 2.3. Place Order | 6 |
| 2.4. Installable Files | 7 |
| 2.5. Install the Templates | 8 |
| 2.6. Successful Installation of Template | 9 |
| 2.7. Where to Locate the Installed Templates | 10 |
| 2.8. Use the Template | 11 |

1. Introduction

We have created this extension for you to choose from 200+ beautiful ZOHO CRM inventory templates to create an awesome brand persona for your business!

- Ready to use templates
- Auto-populates all fields from Zoho CRM
- Hassle-free one-click installation
- Can be easily customized as per requirement
- Compatible Zoho CRM Editions: Enterprise, Ultimate, CRM Plus, Zoho One

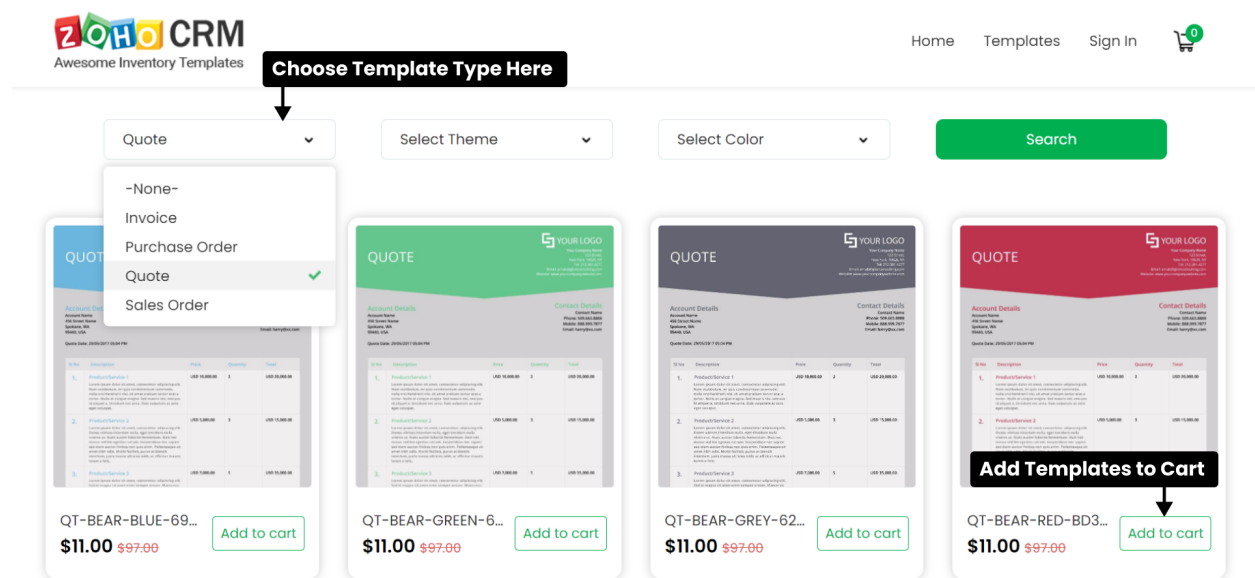
2. How to Install the Templates

Browse through our collection of Zoho CRM inventory templates and purchase the one you like! It's super affordable and you can install it on your Zoho CRM instance with one click.

Website: www.awesomeinventorytemplates.com


2.1. Choose Templates


From the "**Templates**" page, you can choose the templates you like and add them to the cart. You can search the templates by categories (i.e. Quote, Invoice, Sales Order, Purchase Order), theme and color.




2.2. Proceed to Checkout

Once you have added the required templates, click on "Proceed to Checkout". You can select one or multiple templates as per your requirement.





Awesome Inventory Templates

[Home](#) [Templates](#) [Sign In](#) 

Your Order

 "INV-BEAR-RED-BD334D" has been added to your cart.

[Continue shopping](#)

| | Product | Price |
|---|---|---------|
|  |  QT-BEAR-RED-BD334D | \$11.00 |
|  |  INV-BEAR-RED-BD334D | \$11.00 |

[Apply coupon](#)

Cart Total


| | |
|----------|---------|
| Subtotal | \$22.00 |
| Total | \$22.00 |


[Proceed to Checkout →](#)

[Click on "Proceed to Checkout"](#)

2.3. Place Order

Provide your billing details and proceed to pay. For customers outside India, the billing currency will be USD, while for Indian customers, it will be INR.

Awesome Inventory Templates

Home Templates Sign In 

Provide Billing Details Here

Step 1: Provide Billing Details

First Name

Last Name

Company

Country

United States (US) ▼

Street Address

Apartment, Suite, Unit, Etc.

Town / City

State**Step 2: Pay Now**

 Pay via PayPal
don't have a PayPal account?

Click Here to Pay





2.4. Installable Files

Immediately after your purchase, you receive the installable links on the order confirmation page. These links are also sent to your email id.

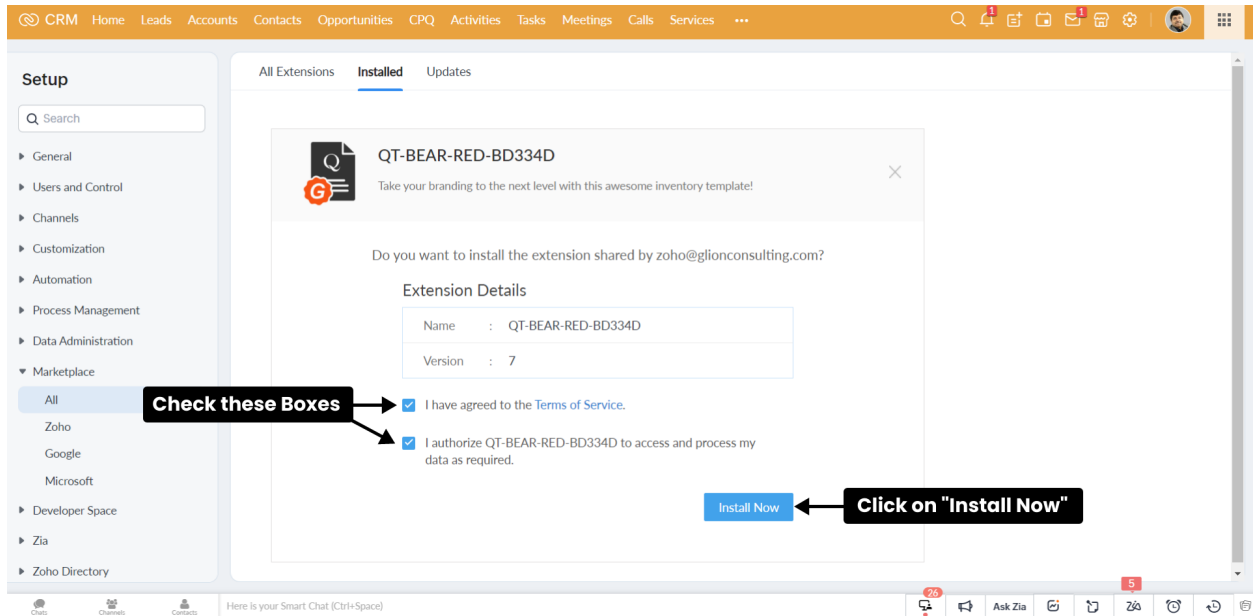
Installable Files

Immediately after Payment, You will Receive the Installation Links

| Product | Expires | Action |
|---------------------|---------|---|
| QT-BEAR-RED-BD334D | Never |  Install Now |
| INV-BEAR-RED-BD334D | Never |  Install Now |

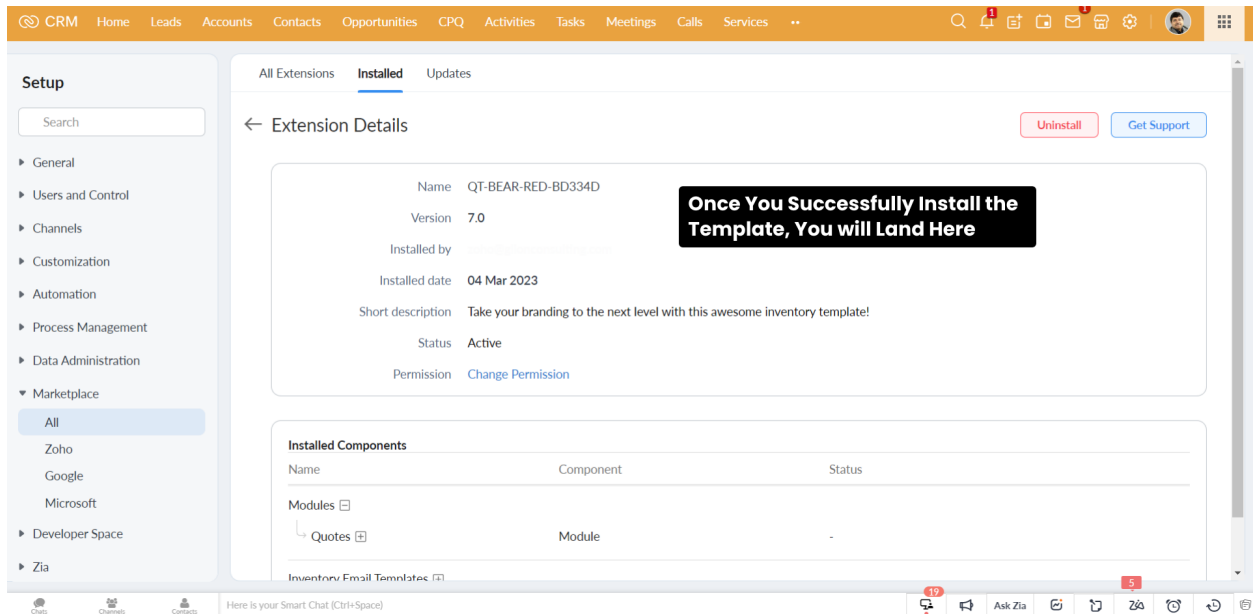
2.5. Install the Templates

You can now install the templates one at a time within your Zoho CRM instance.



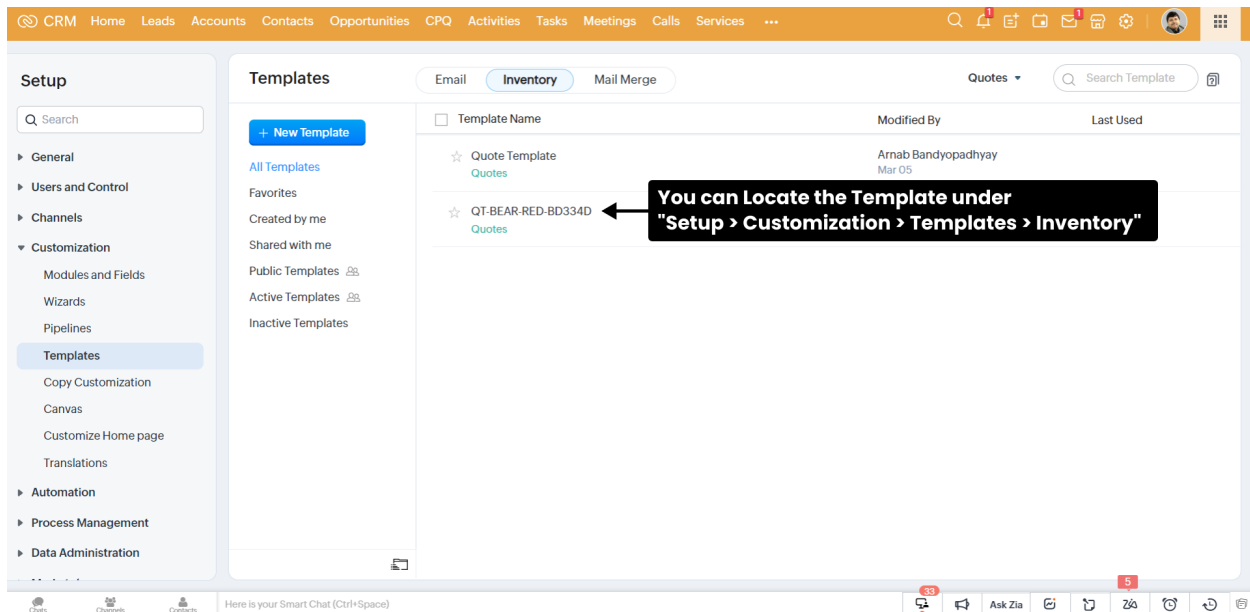
2.6. Successful Installation of Template

Once you successfully install the template, from the following screen you will be able to manage the template related permissions.



2.7. Where to Locate the Installed Templates

The installed templates will be available under **Setup > Customization > Templates > Inventory** inside your Zoho CRM instance.



2.8. Use the Template

Now you can go to the relevant Inventory record (Quote, Invoice, Sales Order or Purchase Order, as applicable) and from the details page – you can choose the template to send them via email or download in PDF.

You Can Now Choose the Template from Inside the Record and Send them via Email or Download in PDF

Send Email

Choose an Inventory Template

QT-BEAR-RED-BD334D

None

Public Templates

✓ QT-BEAR-RED-BD334D

Inactive Templates

Quote Template

Portrait Landscape

QUOTE

GoldenLion Consulting Services Pvt. Ltd.
Regus, RDB Boulevard, Sector V, Salt Lake,
Kolkata, 700091, West Bengal
Tel: +91 8274010365
Email: zoho@glionconsulting.com
Website: www.glionconsulting.com

Account Details

Acme Corporation
100 Industrial Park
Norcross, GA
30071, United States

Contact Details

John Doe
Phone: +1 123 456 7890
Mobile: +1 234 456 7890
Email: john@email.com

Quote Date: 05/03/2023 01:20

| Sl No | Description | Price | Quantity | Total |
|-----------|--------------------------------|--------------|----------|--------------|
| 1. | Website Design and Development | USD 2,500.00 | 1 | USD 2,500.00 |
| Sub Total | | | | USD 2,500.00 |

Need Help?

Send us an email at
zoho@glionconsulting.com