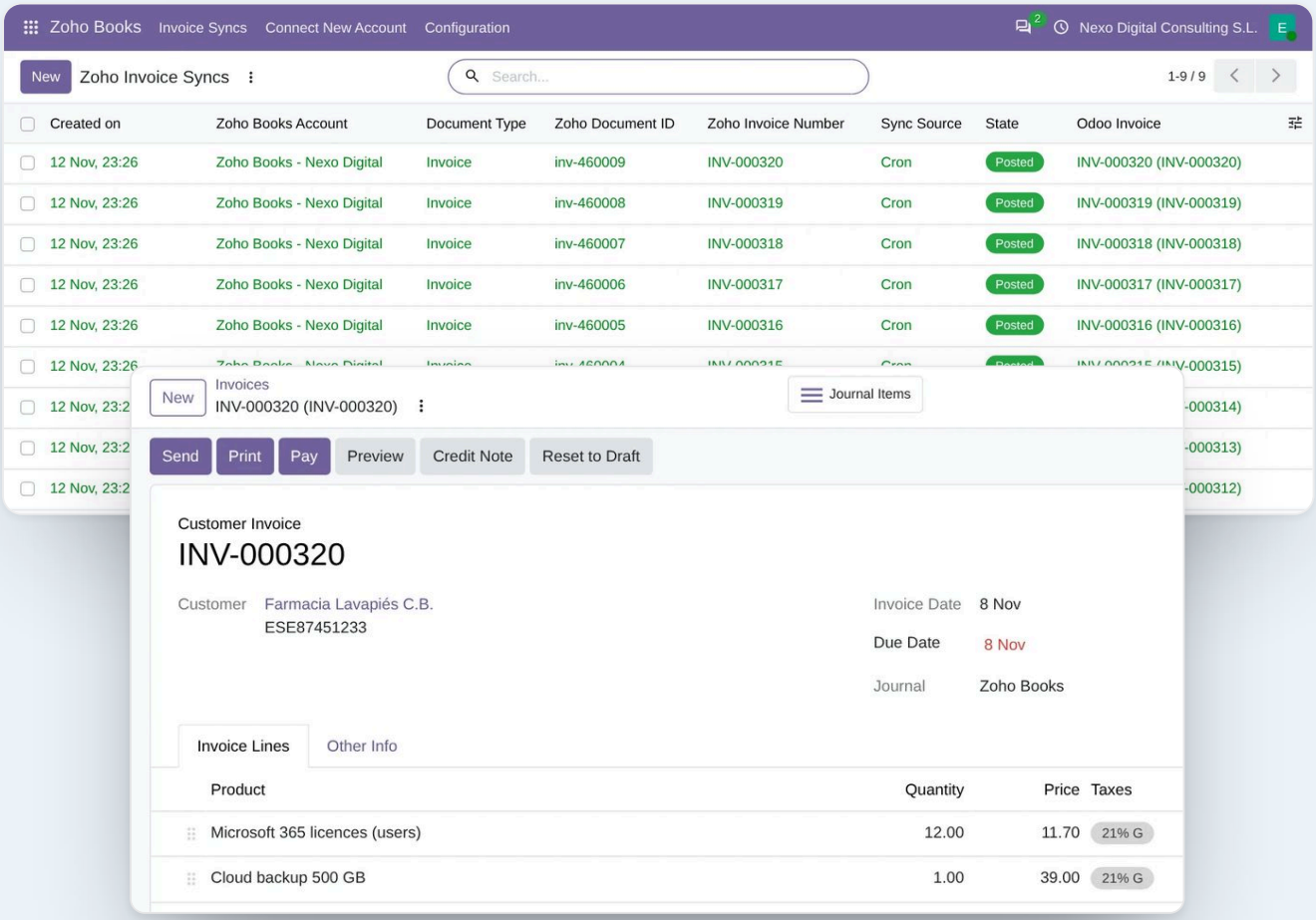
USER MANUAL · INVOICING AND TAX

Zoho Books connector for Odoo

For those who already have the connector: install it, activate it, connect it, set it up and use it, step by step.

Module version 20.0.1.3.4 | Odoo 20 screenshots | Edition of 14-11-2026



Real Odoo 20 screenshot. Each Zoho Books invoice in Odoo, booked with its number, and in front of it invoice INV-000320 in the Zoho Books journal.

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On the right, the page where each section starts. Menu and button names are those of Odoo in English.

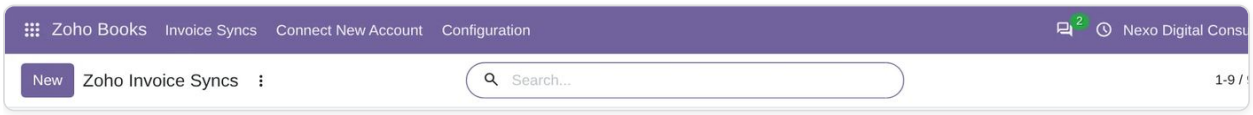
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This manual describes version 20.0.1.3.4 of the module (Odoo branch 20.0, commit fba95ab9c). Everything it says comes from its code: menus, buttons, fields, scheduled actions and error messages.

The screenshots come from a test Odoo 20 database, with a made-up company and data and no real connection to Zoho Books. In Odoo 17, 18 and 19 the module has its own version: if something on your screen does not match, write to us.

1 What it is and where it is

The connector adds the Zoho Books app to Odoo. It brings into Odoo's accounting the invoices and credit notes you issue in Zoho Books, each with its Zoho number, and leaves Zoho Books as the one that issues them and registers them with VERI*FACTU.



- **Real Odoo 20 screenshot.** The Zoho Books app bar, with the list of synchronisations open.

Invoice Syncs	Each Zoho document that arrives, with its status and the Odoo invoice it creates.
Connect New Account	The wizard to connect a Zoho Books organisation. Only administrators can see it.
Configuration › Accounts	Your Zoho Books accounts: one per organisation.
Configuration › Sync Log	Each attempt to bring in a document, with its result.

The Zoho Books menu is visible to users in the connector's **Administrator** group. Outside the app, the connector works in **Invoicing**: Zoho invoices and credit notes go into their own journal, "Zoho Books", as customer invoices already posted. The customers of those invoices are in **Contacts**.

2 Before you start

This is what you need before installing. The connector is the Odoo part: you set up your account and your Zoho app yourself.

- Your Zoho Books organisation, the one that issues your invoices.
- An app of yours in the Zoho API console (api-console.zoho.eu if your Zoho is in Europe), of type "Server-based Application". It gives you a client ID and a client secret.
- To know which data centre your Zoho is in: Europe, US, India, Australia, Japan or China.
- Odoo 17, 18, 19 or 20, on Odoo.sh or on your server, not on Odoo Online. It works on Community and Enterprise.
- An Odoo administrator: they accept the FlexigoTech Cloud data list and the step that routes your Zoho app through the cloud.

The connector only reads. It asks Zoho for these permissions, all read-only: invoices (ZohoBooks.invoices.READ), credit notes (ZohoBooks.creditnotes.READ) and settings (ZohoBooks.settings.READ), which is where your organisations are.

> If an Odoo VERI*FACTU is active in the Odoo company (FlexigoTech's flexigo_spain_verifactu module or Odoo's l10n_es_edi_verifactu), the Zoho documents arrive but are not posted: Zoho Books has already registered them. The chapter "VERI*FACTU: Odoo does not repeat it" explains this.

3 Installation

The module is installed like any third-party Odoo module. An administrator is needed.

How to get it

From its page in Odoo Apps (**https://apps.odoo.com/apps/modules/20.0/flexigobe_zoho_verifactu_connector**) or from the connector's page at flexigotech.com. Choose the Odoo version you use: each version is a separate module.

The module depends on `flexigotech_cloud`, the connection to FlexigoTech Cloud. On Odoo Apps, the module page lists it under "Community Apps Dependencies" and its price already includes it; it is also free and has its own page (**https://apps.odoo.com/apps/modules/20.0/flexigotech_cloud**). Put both folders together in the same modules path and Odoo installs `flexigotech_cloud` at the same time.

On Odoo.sh

1. **Upload the folders to your repository**
   Copy `flexigobe_zoho_verifactu_connector` and `flexigotech_cloud` into the branch of your project, in your modules folder, and push.

2. **Wait for Odoo.sh to build the branch**
   When it finishes, both modules are in the branch.

3. **Install the app**
   In **Apps**, click **Update Apps List** (with developer mode on), search for "Zoho Books" and click **Activate**.

On your server

1. **Copy the folders**
   Leave `flexigobe_zoho_verifactu_connector` and `flexigotech_cloud` in a folder that is on the `addons_path` of your Odoo.

2. **Restart Odoo**
   So that it reads the new modules.

3. **Install the app**
   In **Apps**, **Update Apps List**, search for "Zoho Books" and click **Activate**.

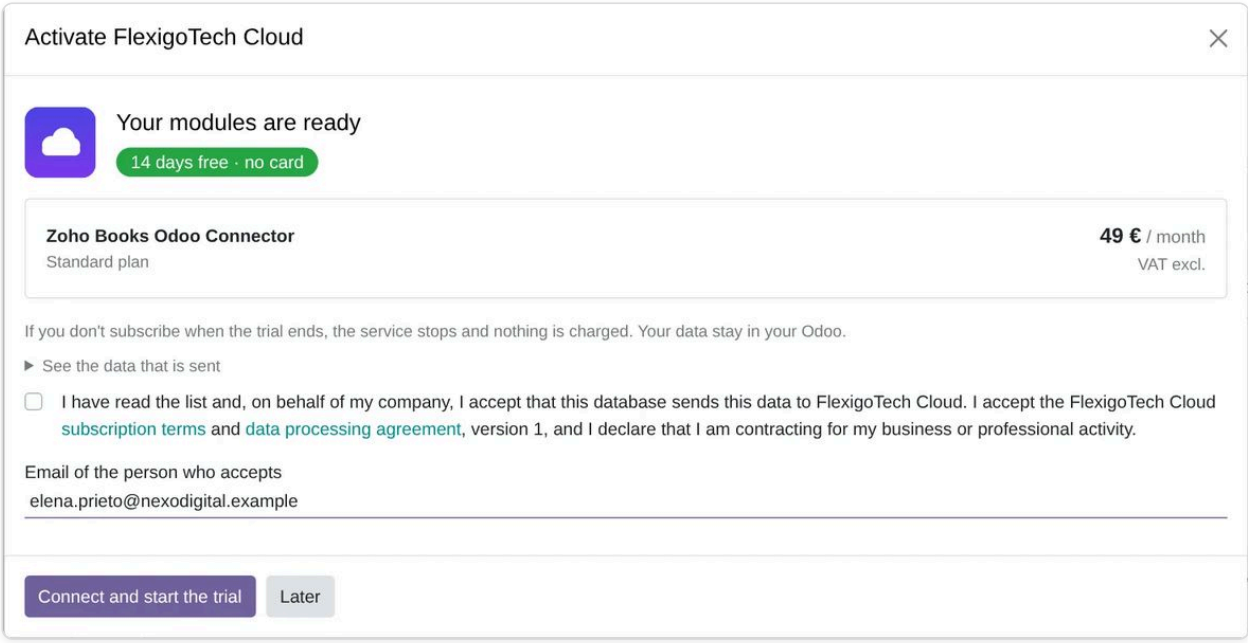
> When installed, Odoo also installs the apps the module depends on: Invoicing. If you already use them, nothing you have changes.

4 Activate FlexigoTech Cloud: the 14-day trial

A new Zoho Books account connects through FlexigoTech Cloud: the client secret of your Zoho app goes once to the cloud, encrypted, and the cloud exchanges your authorisation, renews access and passes each Zoho Books read. Until the database is connected and the module has a trial or subscription, the account does not talk to Zoho Books.

1 **Click Activate in the bar above**

It appears as soon as you install the module. It opens the **Activate FlexigoTech Cloud** window, with the Standard plan and its 14 free days, no card required.



- **Real Odoo 20 screenshot.** The activation window: read the data list, tick the box and enter your email.

2 **Accept and enter your email**

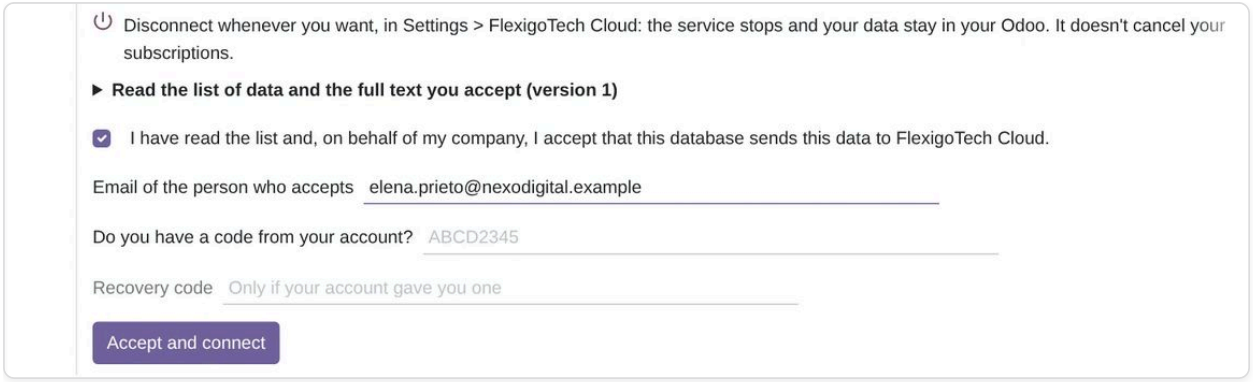
Tick "I have read the list and, on behalf of my company..." (it includes the subscription terms and the data processing agreement) and enter the **Email of the person who accepts**.

3 **Click Connect and start the trial**

Odoo registers the database with FlexigoTech Cloud and starts the module's trial. If you want to leave it for later, **Later** closes the window.

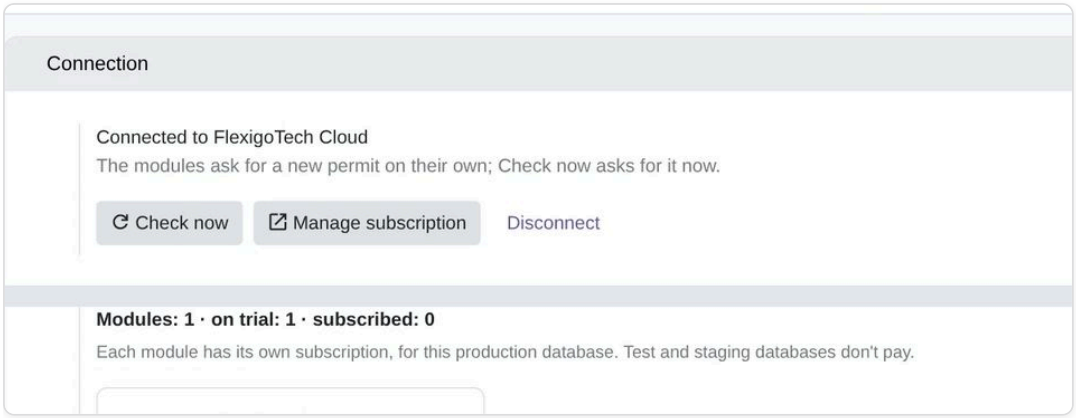
The same, from Settings

In **Settings › FlexigoTech Cloud** is the full list of what the database sends. Tick the box, enter the email and click **Accept and connect**. If you already have an account at app.flexigotech.com, the field **Do you have a code from your account?** links the database to it (the code is valid for 10 minutes).



- **Real Odoo 20 screenshot.** Settings › FlexigoTech Cloud, before connecting: the box ticked, the email and **Accept and connect**.

With the database connected, the **Modules** block shows each module with its status: **On trial** and the date it ends, **Subscribed**, etc. From there you choose the plan (Standard or Pro, monthly or yearly) and click **Subscribe**: payment is made on the Stripe page, outside Odoo.



- **Real Odoo 20 screenshot.** Settings › FlexigoTech Cloud with the database connected and the connector on trial.

PLAN	PRICE	INCLUDES
Standard	€49 per month or €490 per year	Support reply within 1 working day, up to 3 accounts
Pro	€98 per month or €980 per year	Reply within 4 working hours, up to 10 accounts and a video call if needed

Prices exclude VAT. If you do not subscribe when the trial ends, the service stops and nothing is charged; your data stays in your Odoo. **Check now** requests the permission straight away (otherwise the module renews it by itself every 6 hours).

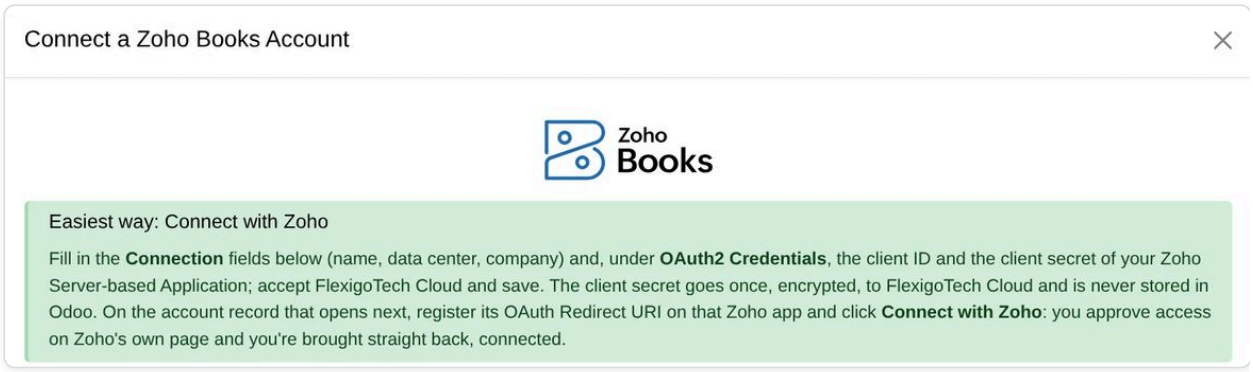
> On a neutralised copy (staging) or on a database with demo data you cannot start a trial: Settings says so with "This database is a neutralised copy or has demo data, so trials can't be started here."

5 Connecting your organisation

This is done once per Zoho Books organisation, with the **Connect New Account** wizard and afterwards from the account.

1. **Open Connect New Account**

   The **Connect a Zoho Books Account** window appears, with the two ways of connecting explained above.



   - **Real Odoo 20 screenshot.** The wizard: at the top, the easiest way, with the **Connect with Zoho** button.

2. **Enter the connection details**

   A **Name** for the account, the **Zoho Data Center** where you created the organisation (Europe is the default) and the Odoo **Company** that its invoices go to.

3. **Enter your Zoho app and accept**

   In **OAuth2 Credentials**, the client ID and client secret of your app. Tick the box that accepts that your app and your Zoho Books reads pass through FlexigoTech Cloud.

4. **Click Connect & Test**

   Odoo creates the account and sends the client secret to FlexigoTech Cloud, which stores it encrypted. Odoo keeps no copy of it. The account opens.

5. **Register the redirect URI in your Zoho app**

   The account shows its **OAuth Redirect URI**. Copy it into your Zoho app as "Authorized Redirect URI".

6. **Click Connect with Zoho**

   You go to the Zoho page, approve access and return to the account, now connected. If your app sees only one organisation, the **Organization ID** fills in by itself; if it sees several, the warning lists them and you enter it yourself.

7. **Click Test Connection**

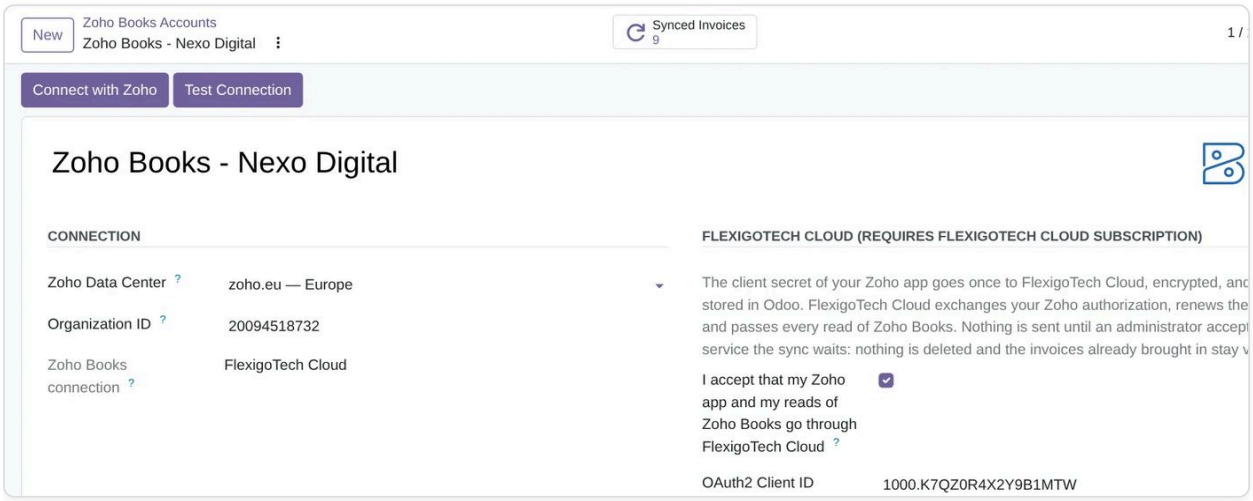
   A test read: the **Zoho Books connection OK** message says how many sent invoices the account can see.

> Only an administrator can accept the step through FlexigoTech Cloud and connect with Zoho. Without the box ticked, nothing is sent.

A Zoho Books organisation is connected only once per database, including when its account is archived: this way no invoice is posted twice.

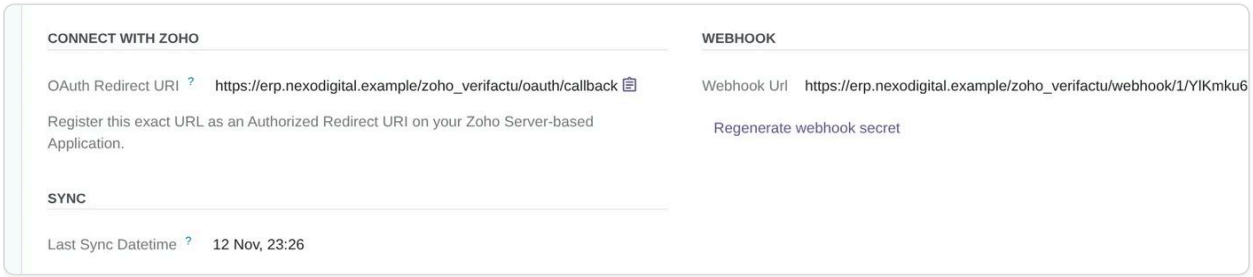
6 The account

Configuration › Accounts stores each connected organisation. This is how an account already connected through FlexigoTech Cloud looks:



- **Real Odoo 20 screenshot.** The account: at the top, **Connect with Zoho** and **Test Connection**; below, the connection.

Zoho Data Center	Where your Zoho is: zoho.eu, zoho.com, zoho.in, zoho.com.au, zoho.jp or zoho.com.cn.
Organization ID	The number of your organisation in Zoho Books. Each read goes to that organisation.
Zoho Books connection	FlexigoTech Cloud on new accounts.
Saved in FlexigoTech Cloud and **Authorized through FlexigoTech Cloud**	When your app reached the cloud and when you approved access in Zoho. With both dates set, the account can read.
Check FlexigoTech Cloud	Asks the cloud whether it has this account's app stored.
Delete from FlexigoTech Cloud	Deletes your app and its access from the cloud. The account stops reading until you connect it again.
Synced Invoices	The button at the top: the documents this account brought in.



- **Real Odoo 20 screenshot.** Further down: the redirect URI, the webhook and the last synchronisation.

Webhook Url	The address to which Zoho Books can notify each invoice. It carries a secret: without it, Odoo does not accept the notification.
Regenerate webhook secret	Changes the secret and with it the URL. The Zoho Books notification must carry the new one.

Last Sync Datetime	How far the last run got. The next one asks for what has changed since then.

For a manual stop, archive the account: while it is archived it makes no calls to Zoho Books and its webhook accepts no notifications. An account that has already brought in documents cannot be deleted, only archived: its syncs record which Zoho invoice each journal entry is.

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7 How invoices arrive

By two routes that end in the same process: a task every 15 minutes and, if you set it up, the webhook.

The **Zoho Books: sync invoices (resilience net)** task asks Zoho Books every 15 minutes for invoices with status sent and for credit notes that have changed since the last run. The first time, it looks back 30 days.

Each document is requested again from Zoho by its id before it is posted: what counts is what Zoho says at that moment. If two routes bring in the same document at once, only one of them posts it.

The webhook

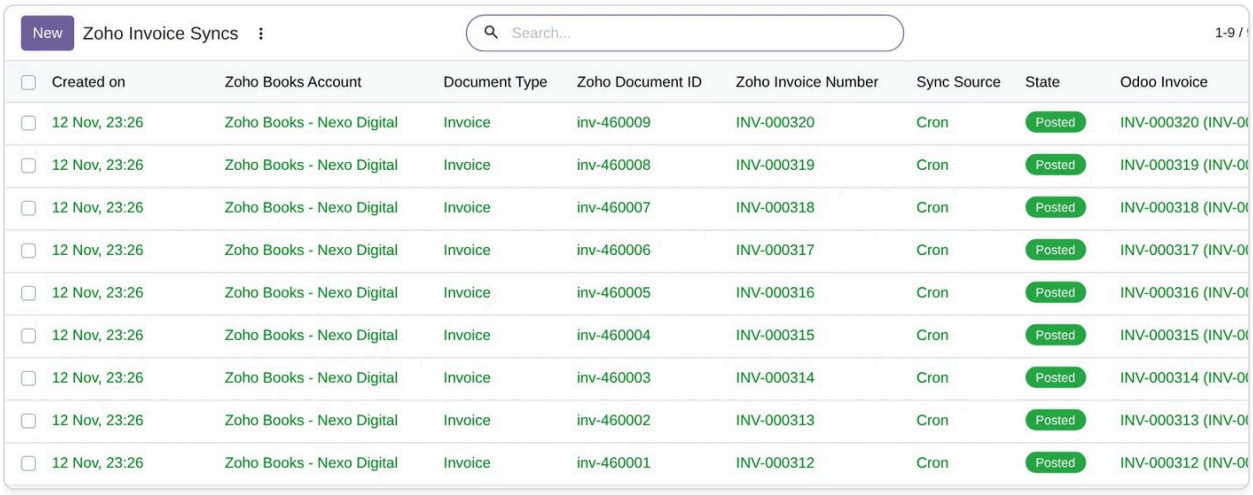
If you want an invoice to arrive immediately, create a webhook in Zoho Books that calls the account's **Webhook Url**. The notification only needs the invoice id (invoice_id) or the credit note id (creditnote_id): the connector requests the document from Zoho. Notifications go straight to your Odoo, without passing through FlexigoTech Cloud.

A notification waits no more than 10 seconds for Zoho. If it fails, the document is left in **Error** and the task tries again on its next run.

> The webhook is optional. Without it, everything still arrives through the task, at most 15 minutes later.

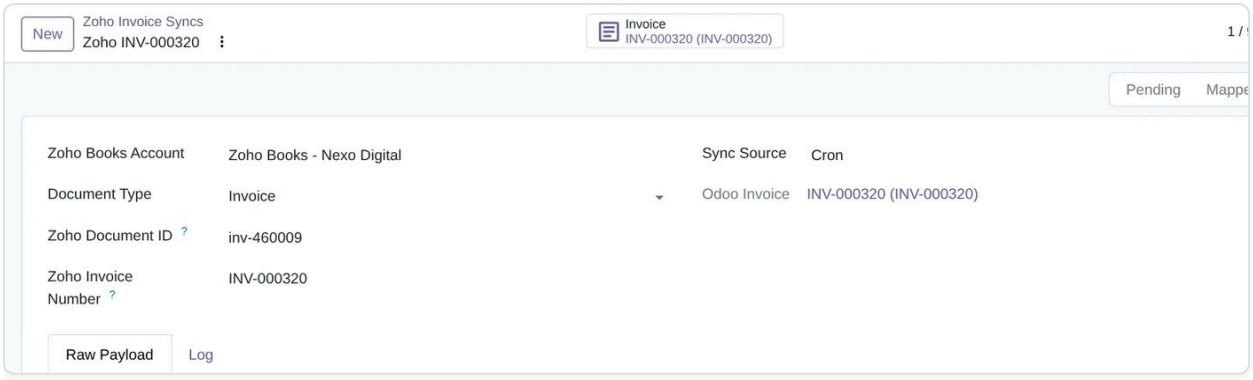
8 The syncs

Invoice Syncs has one row for each Zoho document: invoice or credit note.



- **Real Odoo 20 screenshot.** Each Zoho document with its number, its source, its status and its Odoo invoice.

STATUS	WHAT IT MEANS
Pending	The document is being brought in.
Mapped	The Odoo invoice has been created and still needs posting.
Posted	The invoice is posted in Odoo with its Zoho number.
Blocked	It is not posted because an active VERI*FACTU of Odoo exists in the company.
Error	Something failed. The message says what, and nothing was posted.



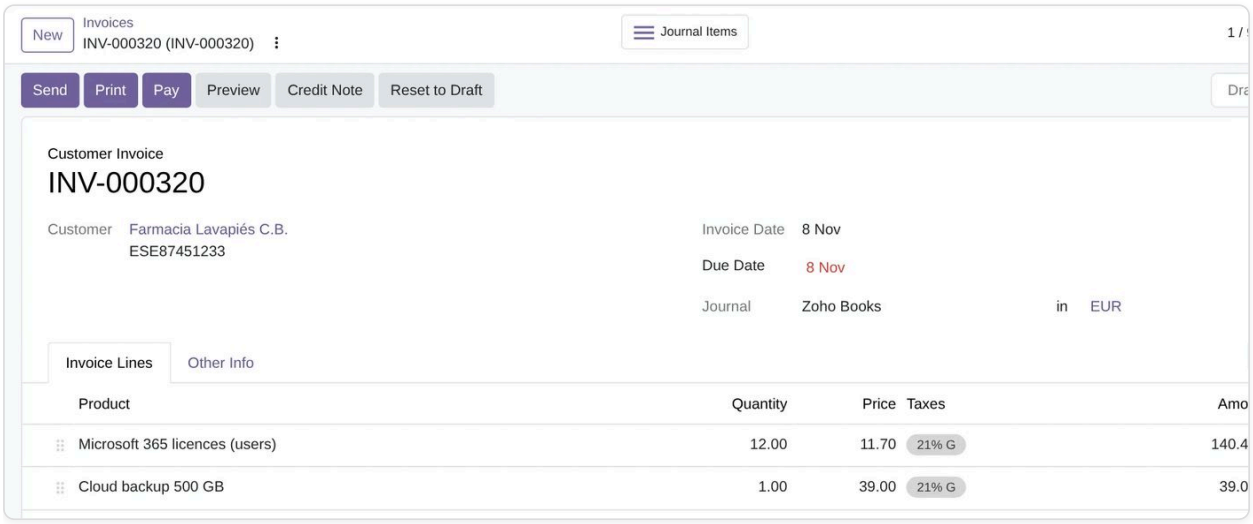
- **Real Odoo 20 screenshot.** A sync: the account, the type, the Zoho id and number, and its Odoo invoice.

Sync Source	**Cron** if the task brought it in and **Webhook** if it arrived through the Zoho notification.
Odoo Invoice	The invoice or credit note it created. At the top, the button opens it.
Raw Payload	What Zoho replied, exactly as received.
Log	Each attempt with this document and its outcome.

A sync in **Error** has the **Retry** button. In addition, the task retries it automatically up to 3 times.

9 The invoice in Odoo

Each Zoho invoice comes in as a customer invoice and each credit note as a credit note, already posted.



- **Real Odoo 20 screenshot.** Zoho Books invoice INV-000320 in Odoo: its number, its customer, the Zoho Books journal and its lines.

Number and reference	Those of Zoho Books. Odoo does not assign a number of its own.
Journal	Zoho Books. The connector creates it the first time, with the code ZOHO.
Invoice Date	That of Zoho.
Due Date	The one Zoho gave the customer. If Zoho does not provide it, Odoo calculates it as it would for any invoice.
Source	"Zoho Books" and the document number.
Client	That of the Zoho invoice (section "Customers, products and taxes").
Currency	That of the Zoho invoice, if it is active in Odoo.

A Zoho credit note comes in as a credit note. If the company has the Spanish localisation that asks for the reason for the credit note, it is given code 01 (R1).

> The Zoho Books journal only keeps what the connector brings in. An invoice created in Odoo in that journal, or a copy of one from Zoho, cannot be posted there, so it never takes the next number from Zoho.

10 VERI*FACTU: Odoo does not repeat it

Zoho Books issues your invoices and registers them in VERI*FACTU. In Odoo they are an accounting mirror: they are never registered again.

Odoo has two VERI*FACTU modules that could register an invoice a second time: flexigo_spain_verifactu from FlexigoTech, which does so when posting, and Odoo's own l10n_es_edi_verifactu, which does so when sending. The connector does not depend on either of them and protects itself against both.

- If either of them is active in the company, the Zoho document arrives but is not posted: it is left **Blocked**, with the reason.
- The account counts those waiting in **Waiting for VERI*FACTU of Odoo to be off**. The first run after it is switched off posts them.
- A Zoho entry cannot be posted by hand while that VERI*FACTU is active.
- When you send a Zoho entry from Odoo, the connector removes the Odoo Veri*Factu option from it: sending it never registers it.

The BOE currently sets 1 January 2027 for those who pay Corporation Tax and 1 July 2027 for everyone else. On 5 October 2026 the Spanish tax authority announced that it plans to postpone this until October 2028; until that appears in the BOE, the 2027 dates apply.

> Whether Zoho Books registers your invoices in VERI*FACTU is a setting in your Zoho Books, not in the connector.

11 Customers, products and taxes

This is how the connector finds the customer, the product and the tax for each invoice.

The customer

- First it looks for an Odoo contact with the same tax ID (NIF) as the Zoho customer.
- Otherwise, one with its **Zoho Contact ID**, which the connector stores when it creates a customer.
- If there is none, it creates one with the name, tax ID and email from Zoho. If there is no name, it is called **Zoho Books Customer**.

The lines

Each line comes in with its description, quantity and price. If an Odoo product has the item's id in **Zoho Item ID**, the line takes that product. The module does not show that field on any screen: without it, the line comes in without a product. No line is lost.

The taxes

The tax for each line is found by its percentage among the company's sales taxes of percentage type: a 21% line from Zoho takes the first sales tax of 21%.

> If the company has no sales tax with that percentage, the line comes in without tax. Before connecting, check that you have the sales taxes you use in Zoho.

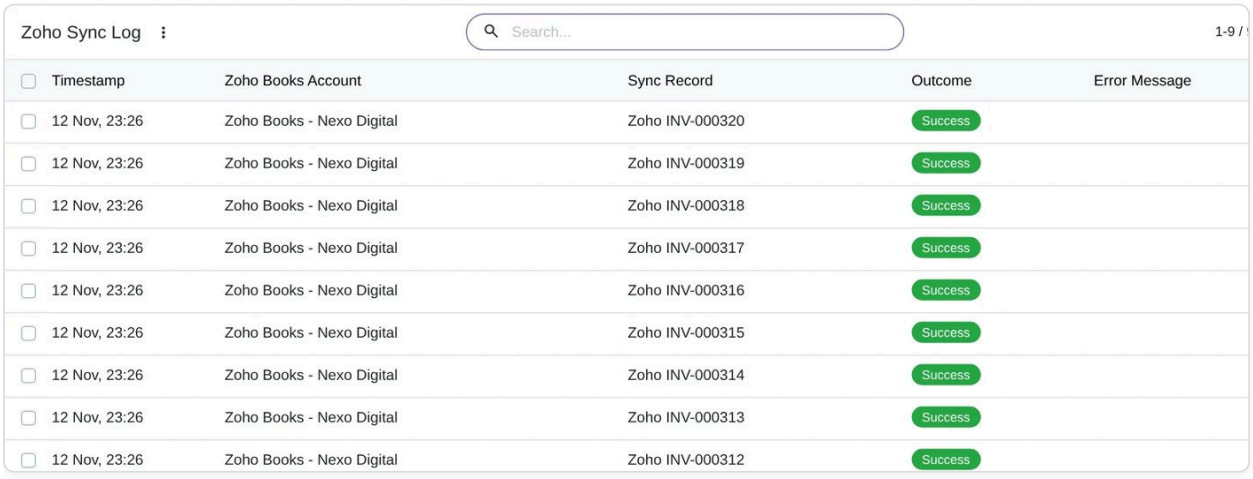
The currency

An invoice in the company's currency comes in in that currency. In another currency, it comes in that way if the currency is active in Odoo. If it is not active or does not exist, the invoice is not posted and the error says which currency is missing: the amount is never converted into your currency without more ado.

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12 The sync log

Configuration › Sync Log records every attempt to fetch a document.



- **Real Odoo 20 screenshot.** Every attempt, with its account, its document and its outcome.

The **Outcome** is **Success**, **Error** or **Blocked**, and the **Error Message** gives the reason. In addition, every posted sync leaves a message in its history with the number of the invoice it created.

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13 What happens on its own

One scheduled task and its rules:

TASK	FREQUENCY	WHAT IT DOES
Zoho Books: sync invoices (resilience net)	15 minutes	Fetches the sent invoices and the credit notes that changed, rechecks the blocked ones and retries the ones that failed.

- Between one call to Zoho and the next it waits 0.2 seconds, so it does not exceed the Zoho limit when there are many invoices.
- If a document fails, the next pass requests it again: the marker for how far it got does not leave it behind.
- Anything that no longer appears in the Zoho lists is retried only 3 times, 20 at a time per pass. After that, use **Retry**.

- Anything blocked by an Odoo VERI*FACTU is checked on every pass, without calling Zoho while it stays blocked.

You change the frequency in **Settings › Technical › Scheduled Actions**, in developer mode.

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14 If something fails

What usually happens and where to look.

No trial and no subscription	The sync waits: it does not call Zoho, does not mark anything as failed and does not delete anything. The invoices already fetched stay in Odoo. It resumes on its own when you renew.
Test Connection fails	Check that the account has an **Organization ID** and both FlexigoTech Cloud dates. If **Authorized through FlexigoTech Cloud** is missing, click **Connect with Zoho**.
Zoho will not let you return to Odoo	The account's **OAuth Redirect URI** is not in your Zoho app, or does not match it.
A missing currency	Activate the currency in Odoo and click **Retry**.
The number already exists	Another entry in the Zoho Books journal has that number (another organisation with the same numbering). It is not posted and nothing is renumbered.
An invoice with no lines or no number	It is not fetched: the error says why.
Blocked	There is an active Odoo VERI*FACTU on the company. Chapter "VERI*FACTU: Odoo does not repeat it".

A pause in FlexigoTech Cloud does not delete anything or disconnect the account: when the service comes back, the task carries on where it left off.

15 Support

Write to us for installation, configuration or any questions. On the Standard plan we reply within 1 working day; on the Pro plan, within 4 working hours, and if needed we can go through it by video call. Tell us your Odoo version, the module version and, if there is an error, its full text.

Email

To install it, set it up or for any question.
comercial@flexigotech.com

On the web

The connector page, with the guide and the prices.
flexigotech.com/en/zoho-books-connector-odoo.html

On Odoo Apps

The module page on the Odoo store.
apps.odoo.com

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