FREE TEMPLATE · BUSINESS REQUIREMENT DOCUMENT

Zoho Inventory

Business Requirement Document

Business requirement document template for a Zoho Inventory implementation

13 sections · 90 questions · fillable PDF

Document Control

Client company

Project name

Prepared by

Role and email

Date

Version

Implementation partner

Target go-live date

Stakeholders

Name	Department and role	Email	Decision maker
			☐
			☐
			☐
			☐

What Is Inside

- Business Overview (8)
- Organisation Setup (11)
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- Mobile And AI (5)
- Testing, Training, Go-Live And Support (7)

How To Use This BRD

1. Answer each question in the box under it. Where there is a dropdown, pick an answer or type your own, then add detail in the box beside it. Attach examples, forms or sheets where a question asks for them.
2. Tick the priority for each requirement: Must have for go-live, Nice to have for a later phase, or Not needed.
3. Leave a question blank if it does not apply or you are not sure. We go through open points together in the workshop.
4. Each question has a code (for example LD-03) so everyone can refer to the same requirement in emails and meetings.
5. When it is complete, the signed BRD becomes the agreed scope for the implementation.

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MB 12. Mobile And AI
GL 13. Testing, Training, Go-Live And Support

Want help completing it?

Linz Technologies runs requirement workshops and implements Zoho for teams in the UAE, India and worldwide.
13+ years as a Zoho partner · 1,500+ Zoho implementations · sales@linztechnologies.com

1. Business Overview

BO · 8 questions

Why you are implementing Zoho Inventory and how you will judge success.

BO-01 Describe your business in a few lines: what you do, for whom, and in which countries.

☐ Must ☐ Nice ☐ Not needed

BO-02 What problems should Zoho Inventory solve? List the biggest pain points with your current process or system.

☐ Must ☐ Nice ☐ Not needed

BO-03 What are the top three outcomes you expect in the first six months?

☐ Must ☐ Nice ☐ Not needed

BO-04 Which KPIs will measure success?

☐ Must ☐ Nice ☐ Not needed

BO-05 Which teams and locations are in scope for this phase?

☐ Must ☐ Nice ☐ Not needed

BO-06 What is out of scope for this phase?

☐ Must ☐ Nice ☐ Not needed

BO-07 Are there regulatory or compliance requirements to meet (GDPR, PDPL, DPDP Act, industry rules)?

Select

Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

BO-08 Is there a deadline or business event driving the go-live date?

☐ Must ☐ Nice ☐ Not needed

2. Organisation Setup

OS · 11 questions

Company-wide settings that the rest of Zoho Inventory depends on.

OS-01 Legal company name, trading name and registered address as they should appear in the system.

☐ Must ☐ Nice ☐ Not needed

OS-02 Which Zoho data centre should hold your data?

Select

Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

OS-03 Which Zoho Inventory edition or plan is planned or already purchased, and how many licences?

☐ Must ☐ Nice ☐ Not needed

OS-04 Base currency, and any other currencies you use.

☐ Must ☐ Nice ☐ Not needed

OS-05 Time zone or time zones, date format and number format.

☐ Must ☐ Nice ☐ Not needed

OS-06 Financial year start month

Select

Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

OS-07 Working days, business hours and holidays.

☐ Must ☐ Nice ☐ Not needed

OS-08 Company logo and brand colours available for templates?

Select

Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

OS-09 Is this one company, or several companies, brands or branches?

Select

Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

OS-10 Which languages do users and customers need?

☐ Must ☐ Nice ☐ Not needed

OS-11 Is your company domain verified with Zoho already?

Select

Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

3. Users, Roles And Security

UR · 9 questions

Who uses Zoho Inventory and what each person can see and do.

UR-01 List the users by department with their job titles, managers and email addresses (or attach a sheet).

☐ Must ☐ Nice ☐ Not needed

UR-02 Describe the roles and the reporting hierarchy from top to bottom.

☐ Must ☐ Nice ☐ Not needed

UR-03 Data visibility: who should see whose records?

Select

Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

UR-04 Which actions must be restricted (delete, export, import, edit settings, view reports)?

☐ Must ☐ Nice ☐ Not needed

UR-05 Are there sensitive fields only some roles may see or edit? List them.

☐ Must ☐ Nice ☐ Not needed

UR-06 Two-factor sign-in required for all users?

Select

Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

UR-07 Single sign-on

Select

Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

UR-08 Who are the administrators on your side, and who approves changes to the setup?

☐ Must ☐ Nice ☐ Not needed

UR-09 Is an audit trail of changes required?

Select

Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

4. Items And Catalogue

IT · 8 questions

What you stock and sell.

IT-01 Number of items and categories. Attach the item list if available.

☐ Must ☐ Nice ☐ Not needed

IT-02 Item fields needed (SKU, barcode, brand, unit, dimensions, weight, HS code, reorder level).

☐ Must ☐ Nice ☐ Not needed

IT-03 Item variants (size, colour)?

Select

Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

IT-04 Batch or lot tracking with expiry dates?

Select

Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

IT-05 Serial number tracking?

Select
Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

IT-06 Composite items, kits or bundles?

Select
Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

IT-07 Units of measure conversion (carton to piece)?

Select
Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

IT-08 Valuation method

Select
Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

5. Warehouses And Stock Control

WH · 6 questions

Where stock sits and how it moves.

WH-01 List warehouses, stores and locations.

☐ Must ☐ Nice ☐ Not needed

WH-02 Bin or rack locations inside warehouses?

Select
Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

WH-03 Transfer orders between warehouses?

Select
Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

WH-04 Reorder points and who is alerted.

☐ Must ☐ Nice ☐ Not needed

WH-05 Stock counts

Select
Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

WH-06 Rules for adjustments, damage and write-offs, and who approves them.

☐ Must ☐ Nice ☐ Not needed

6. Sales Orders And Fulfilment

SO · 6 questions

From order to delivery.

SO-01 Sales channels

Select

Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

SO-02 Pick, pack and ship steps?

Select

Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

SO-03 Shipping carriers to integrate.

☐ Must ☐ Nice ☐ Not needed

SO-04 Back orders and drop shipments?

Select

Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

SO-05 Sales returns and refunds process?

Select

Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

SO-06 Price lists, discounts and customer-specific prices.

☐ Must ☐ Nice ☐ Not needed

7. Purchasing

PO · 4 questions

From purchase order to receiving.

PO-01 Approval rules for purchase orders.

☐ Must ☐ Nice ☐ Not needed

PO-02 Receive goods in part deliveries?

Select

Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

PO-03 Landed costs (freight, customs, duties)?

Select

Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

PO-04 Main vendors and lead times.

☐ Must ☐ Nice ☐ Not needed

8. Workflows, Approvals And Notifications

WF · 7 questions

Rules that run on their own inside Zoho Inventory.

WF-01 List the automatic actions you want (for example: when X happens, do Y and notify Z).

☐ Must ☐ Nice ☐ Not needed

WF-02 Which processes need approval, at how many levels, and who approves?

☐ Must ☐ Nice ☐ Not needed

WF-03 What happens if the approver is away or does not respond?

Select

Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

WF-04 Which notifications are needed, to whom, and by which channel (email, Cliq, WhatsApp, mobile push)?

☐ Must ☐ Nice ☐ Not needed

WF-05 Are scheduled reminders or escalations needed?

Select

Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

WF-06 List the email or message templates you need.

☐ Must ☐ Nice ☐ Not needed

WF-07 Should approvers act from email or the mobile app?

Select

Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

9. Reports And Dashboards

RD · 6 questions

What management, managers and users need to see.

RD-01 List the reports you use today, or attach examples.

☐ Must ☐ Nice ☐ Not needed

RD-02 Which dashboards does management need?

☐ Must ☐ Nice ☐ Not needed

RD-03 Which dashboards do team managers need?

☐ Must ☐ Nice ☐ Not needed

RD-04 Should reports be emailed automatically?

Select

Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

RD-05 Do you need reports that combine data from several Zoho apps (Zoho Analytics)?

Select

Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

RD-06 Who may export reports and data?

☐ Must ☐ Nice ☐ Not needed

10. Integrations

IN · 6 questions

Other systems Zoho Inventory must talk to.

IN-01 Zoho Books (accounting).

☐ Must ☐ Nice ☐ Not needed

IN-02 Online store or marketplace (Shopify, WooCommerce, Amazon, noon).

☐ Must ☐ Nice ☐ Not needed

IN-03 Barcode scanners, label printers or POS.

☐ Must ☐ Nice ☐ Not needed

IN-04 Shipping and courier companies.

☐ Must ☐ Nice ☐ Not needed

IN-05 Are there in-house systems with APIs we should connect to? Describe what must flow and in which direction.

☐ Must ☐ Nice ☐ Not needed

IN-06 Do you need a portal for customers, partners, vendors or employees?

Select
Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

11. Data Migration

DM · 7 questions

Moving your existing data into Zoho Inventory.

DM-01 Where is the data today?

Select
Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

DM-02 Which records should be migrated, and roughly how many of each (items, opening stock by warehouse, customers, vendors, open orders)?

☐ Must ☐ Nice ☐ Not needed

DM-03 How much history should be migrated?

Select
Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

DM-04 Should attachments and documents be migrated?

Select
Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

DM-05 Who will clean the data before migration?

Select
Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

DM-06 Is a test migration and sign-off needed before the final load?

Select
Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

DM-07 Cut-off date after which the old system becomes read-only.

☐ Must ☐ Nice ☐ Not needed

12. Mobile And AI

MB · 5 questions

Working on the move, and AI help inside the system.

MB-01 How many users will use the mobile app?

Select

Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

MB-02 Is offline access needed?

Select

Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

MB-03 Do you want AI predictions, summaries or anomaly alerts (Zia)?

Select

Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

MB-04 Would you like an AI assistant (Zia, ChatGPT, Claude or Copilot) to answer questions from this data?

Select

Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

MB-05 Are there tasks AI should never do automatically?

☐ Must ☐ Nice ☐ Not needed

13. Testing, Training, Go-Live And Support

GL · 7 questions

Making sure the team is ready and supported.

GL-01 Who will test the setup (user acceptance testing), and how much time can they give?

☐ Must ☐ Nice ☐ Not needed

GL-02 How should training be delivered?

Select

Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

GL-03 How many administrators and how many end users need training?

☐ Must ☐ Nice ☐ Not needed

GL-04 Do you need user guides in a specific language?

Select

Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

GL-05 Preferred go-live approach

Select

Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

GL-06 Support needed after go-live

Select

Choose, or type your own

☐ Must ☐ Nice ☐ Not needed

GL-07 Who on your side will own Zoho Inventory after go-live?

☐ Must ☐ Nice ☐ Not needed

Sign-Off

By signing, both parties agree that this document describes the scope of the implementation.

Client

Name

Designation

Signature

Date

Implementation partner

Name

Designation

Signature

Date

Planning a Zoho Inventory implementation?

Send your completed BRD to sales@linztechnologies.com for a scoped quote, or visit linztechnologies.com