



# **for Administrators**

# **Complete Course Plan**

## About

The Zoho Books Training Course is a three-day online training program aimed at enabling businesses to set up their organizations in Zoho Books and learn the best practices for using the tool. Each module includes a concept explanation, demonstration, hands-on exercises, and Q&A session.

## Who can attend?

Chartered accountants, auditors, and accountants, individuals with an accountancy background, and business owners.

## What's in store?

### Day One - 5 Hours

## Module 1: Introduction

- Introduction to Zoho Finance
- What is Zoho Books?
- Zoho Books terminology



## Module 2: Setting up the organization

- Creating the organization
- User management
- General settings
- Tax settings
- Contacts and items
- Importing data in bulk

## Module 3: Day-to-Day Transactions

- Purchase transactions
- Sales transactions
- Payments and refunds
- Recurring transactions

## Module 4: Time-Based Invoicing

- Projects
- Timesheets
- Zoho Projects integration



## Day Two - 5 Hours

### Module 5: Banking

- Importing bank feeds
- Matching and categorizing
- Transaction rules
- Reconciliation

### Module 6: Advanced Operations

- Price lists
- Reporting tags
- Budgeting
- Manual journals
- Templates

### Module 7: Reports

- Business overview
- Report customization
- Tax reports
- Activity reports



## Modules 8: Customization

- Custom fields
- Custom buttons
- Custom view
- Validation rules
- Related lists
- Web tabs

## Module 9: Automation

- Reminders
- Workflow rules
- Custom functions, email alerts, and webhooks
- Document autoscan

## Module 10: Integrations

- Advanced inventory control
- Zoho CRM
- Zoho Analytics
- Zoho Mail

