



for Administrators Complete Course Plan



About

The Zoho Expense Training Course is a two-day online training program that aims to enable businesses to set up their organizations in Zoho Expense and learn the best practices for using the tool. Each module includes a concept explanation, demonstration, hands-on exercises, and Q&A sessions.

Who can attend?

Administrators who set up and maintain their organization's configuration in the application.

What is covered?

Duration: Day One - 3 Hours

Module 1: Introduction

- Introduction to Zoho Finance
- What is Zoho Expense?



Module 2: Setting up the organization

- Signing up for Zoho Expense
- General guidelines
- User management
- General settings

Module 3: Approval and permissions

- Reports approval
- Data export
- Analytics
- Role-based permissions

Duration: Day Two - 3 Hours

Module 4: More settings

- Policies
- Integrations
- Budget tracking



Module 5: Automation

- Report automation
- Workflow rules
- Custom alerts, field updates, and webhooks

Module 6: Tips and tricks

- Best practices for admins
- Frequently asked questions
- What's next?
- Q&A session

