



**ZOHO** Invoice

# Invoice and Time Tracking

## **About**

In this online training program, we will walk you through the product, covering each module with a concept explanation, demonstration, best practices, hands-on exercises, and Q&A session.

## **Who can attend?**

Business owners, freelancers, consultants, and finance managers.



# What's in store?

## Day One

### Module 1: Introduction

- Introduction to Zoho Invoice
- Creating the organization
- General settings
- Setting up taxes
- Contacts, items, and price list

### Module 2: Day-to-day transactions

- Sales transactions
- Payments and refunds
- Recurring transactions



## Module 3: Time-based invoicing

- Projects
- Timesheets
- Zoho Projects integration

## Module 4: Reports

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



## Day Two

### Module 5: Customization

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

### Module 6: Automation

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

### Module 7: Integrations

- Zoho CRM
- Zoho People
- Zoho Desk

