Course: Zoho Books

Duration: 30 Hrs (Changeable) | Fees: Individual / Batch

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Syllabus on the Next Page ..

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Zoho Books Course Syllabus â€" Nestsoft Technomaster

Module 1: Introduction to Zoho Books

✳ Overview of Zoho Books â€" Features and Benefits

✳ Understanding Cloud Accounting and Automation

✳ Zoho Books Dashboard and Navigation

✳ Setting Up a New Organization in Zoho Books

✳ User Roles and Permissions Management

Module 2: Setting Up Accounting and Financial Preferences

✳ Configuring Company Details and Fiscal Year

✳ Chart of Accounts â€" Creating and Managing Accounts

✳ Multi-Currency Setup and Foreign Exchange Transactions

✳ Customizing Invoice and Document Templates

✳ Setting Up Taxes â€" GST, VAT, and Other Tax Rules

Module 3: Managing Sales and Receivables

✳ Creating and Customizing Invoices

✳ Sending Quotes and Estimates to Clients

✳ Recording Customer Payments and Refunds

✳ Automating Recurring Invoices and Payment Reminders

✳ Managing Sales Orders and Credit Notes

Module 4: Managing Purchases and Payables

✳ Creating and Tracking Purchase Orders

✳ Recording Bills and Vendor Payments

✳ Handling Expenses and Reimbursements

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✳ Recurring Bills and Auto-Pay Setup

✳ Managing Vendor Credits

Module 5: Bank Reconciliation and Cash Flow Management

✳ Connecting Bank Accounts and Importing Transactions

✳ Automating Bank Feeds and Transaction Matching

✳ Reconciling Accounts and Fixing Discrepancies

✳ Managing Petty Cash and Cash Flow Forecasting

Module 6: Taxation and Compliance (GST, VAT, TDS, etc.)

✳ Understanding Taxation in Zoho Books

✳ Setting Up GST and VAT Tax Rates

✳ Generating Tax Reports and Filing GST Returns

✳ Withholding Tax (TDS) Configuration and Reporting

✳ Audit Trail and Compliance Management

Module 7: Inventory Management and Stock Control

✳ Enabling and Configuring Inventory in Zoho Books

✳ Adding Products, SKUs, and Pricing

✳ Tracking Stock Levels and Stock Adjustments

✳ Managing Warehouses and Multi-Location Inventory

✳ Generating Inventory Valuation and Stock Reports

Module 8: Reports and Financial Analysis

✳ Generating Profit and Loss Statements

✳ Balance Sheet and Trial Balance Overview

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✳ Cash Flow and Revenue Forecasting

✳ Customizing and Automating Reports

✳ Exporting and Sharing Financial Reports

Module 9: Integrating Zoho Books with Other Zoho Apps

✳ Connecting Zoho CRM, Zoho Inventory and Zoho Payroll

✳ Automating Workflows using Zoho Flow

✳ Third-party Integrations (Stripe, PayPal, Razorpay, etc.)

✳ API and Customization for Advanced Users

Module 10: Automation and Advanced Features

✳ Setting Up Workflows and Automating Transactions

✳ Using Client Portal for Customer Communication

✳ Managing Subscription Billing and Retainers

✳ Handling Multi-Currency Transactions and International Business

Hands-on Projects and Real-Time Scenarios

✳ Setting Up and Managing a Business in Zoho Books

✳ Automating Invoice and Payment Processing

✳ Handling GST Compliance and Tax Filing

✳ Creating Custom Reports and Dashboards

✳ Integrating Zoho Books with Zoho CRM for Sales and Accounting Sync

(Click on Course for more details)

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- Thank You -

N.B:This syllabus is not final and can be customized as per requirements / updates.