



# CERTIFICATE IN ZOHO BOOKS

**DURATION: 60 Hours**

**TOTAL CREDITS: 2**

**COURSE SYLLABUS**

## Objective

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Unlock the power of Zoho Books, a comprehensive accounting software designed to streamline your financial operations and boost efficiency. In this course, you'll dive into: Basic and advance functionalities of Zoho Books, Financial management techniques, Tips and tricks for optimizing your accounting processes, security and data management best practices. Whether you're a small business owner, accountant, or aspiring finance professional, this course will equip you with the skills and knowledge to navigate Zoho Books like a pro.

## Exit Profile

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- Proficient in setting up and customizing a company profile in Zoho Books
- Skilled in managing the chart of accounts
- Capable of recording transactions related to purchases, sales, and inventory management
- Experienced in handling warehouses, managing bundled composite items, and setting price levels
- Knowledgeable in statutory compliance, including GST and branch transfers.

## Career Path

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- Accountant
- Accounts Executive
- Financial Officer
- Book Keeper
- Internal Auditor

# Course Outline

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<b>Course Name:</b>	<b>CERTIFICATE IN ZOHO BOOKS</b>	<b>Duration:</b>	<b>60 H</b>
<b>Module</b>	<b>Topic</b>	<b>Duration.</b>	<b>Total Duration.</b>
<b>Module - I</b>	INTRODUCTION AND PERSONALIZE ZOHO BOOKS	2	60 H
	DASH BOARD AND SETTINGS	3	
	BRANCHES	5	
	MASTER DATA	10	
	BANKING	5	
	PURCHASE AND SALES MANAGEMENT	15	
	ORDER MANAGEMENT	5	
	CREDIT NOTE MANAGEMENT	5	
	WORKING WITH ADVANCE FEATURE	10	

# Course in Detail

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## MODULE:1:

### GETTING STARTED

- Welcome
- How Zoho Books Works
- Access Zoho Books
- Navigating Zoho Books
- Keyboard Shortcuts

### PERSONALISE

- Overview - Personalize
- Update Your Email Address
- Change Password
- Change Theme
- Add/Remove Your Logo
- Delete Organization
- Delete Account
- More Actions
  - ❖ Quick Create
  - ❖ Change Organization Name
  - ❖ Add Organization
  - ❖ Switch Between Organizations
  - ❖ Change Default Organization
  - ❖ Notifications and Announcements
  - ❖ Product Updates

### DASHBOARD

- Overview Dash board

### SETTINGS

- Settings - Overview
- Organization Profile
- Opening Balances
- Users & Roles
- Preferences
- Currencies
- Taxes
- Templates

- SMS Notifications
- Emails
- Reminders
- Reporting Tags
- Automation
- Integrations
- Data Backup
  - ❖ Domain Mapping
  - ❖ Privacy and Security
  - ❖ Connections
  - ❖ Incoming Web hooks
  - ❖ Signals

## **DOCUMENTS**

- Document Overview

## **BRANCHES**

- Overview - Branches
- Basic Functions in Branches
- Track Branch Transactions
- Other Actions for Branches

## **CUSTOMERS & VENDORS**

- Introduction - Customers & Vendors
- Record Transactions for Customers/Vendors
- Customer Information in Transactions
- Opening Balance for Customers/Vendors
- Link Customer and Vendor
- Customer Credit Limit
- Other Actions for Customers/Vendors
- Customers/Vendors Preferences

## **ITEMS**

- Introduction - Items
- Inventory Adjustments
- Price Lists
- Other Actions for Items
- Reports for Items
- Zoho Inventory Add-on
- Item Preferences

## **BANKING**

- Overview - Banking

- Add Accounts
- Add Transactions
- Bank Feeds
- Match & Categorize Transactions
- Transaction Rules
- Reconciliation
- Other Actions

### **QUOTES (FORMERLY ESTIMATES)**

- Introduction - Quotes
- Customize Quote
- Convert to Sales Order
- Convert to Invoice
- Create Retainers
- Other Actions for Quote
- Quote Preferences

### **DELIVERY CHALLANS**

- Overview - Delivery Challans
- Basic Functions in Delivery Challans
- Functions in Delivery Challans
- Manage Delivery Challans
- Other Actions for Delivery Challans
- Delivery Challan Preferences

### **RETAINER INVOICES**

- Overview - Retainer Invoice
- Basic Functions in Retainer Invoice
- Functions in Retainer Invoice
- Manage Retainer Invoice
- Other Actions in Retainer Invoice
- Retainer Invoice Preferences

### **SALES ORDER**

- Introduction - Sales Order
- Convert to Invoice
- Convert to Purchase Order
- Delete Sales Order
- Other Actions for Sales Order
- Sales Order Preferences

### **INVOICES**

- Introduction - Invoices

- Record Payment for Invoice
- Bill of Supply
- Payments Received
- Delete Invoice
- Invoice Preferences
- Other Actions for Invoice
- Troubleshooting

#### **PAYMENTS RECEIVED**

- Overview - Payments Received
- Basic Functions in Payments Received
- Functions in Payments Received
- Manage Payments Received
- Other Actions for Payments Received
- Payments Received Preferences

#### **RECURRING INVOICES**

- Overview - Recurring Invoices
- Create & Send Recurring Invoice
- Receiving Payments
- Recurring Invoice Workflow
- Manage Recurring Invoices
- Other Actions for Recurring Invoice
- Recurring Invoice Preferences

#### **CREDIT NOTES**

- Introduction - Credit Note
- Apply Credits to Invoice
- Refund Credits
- Delete Credit Note
- Other Actions for Credit Note
- Credit Note Preferences

#### **EXPENSES**

- Overview - Expenses
- Basic Functions in Expenses
- Manage Expenses
- Mileage Expenses
- Other Actions for Expenses
- Expense Preferences

#### **PURCHASE ORDER**

- Overview - Purchase Orders

- Basic Functions in Purchase Orders
- Functions in Purchase Orders
- Manage Purchase Orders
- Other Actions in Purchase Orders
- Purchase Order Preferences

#### **BILLS**

- Overview - Bills
- Basic Functions in Bills
- Functions in Bills
- Manage Bills
- Other Actions for Bills
- Bill Preferences

#### **CHEQUE**

- Print Checks in Zoho Books

#### **PAYMENTS MADE**

- Overview - Payments Made
- Basic Functions in Payments Made
- Functions in Payments Made
- Manage Payments Made
- Other Actions for Payments Made
- Payments Made Preferences

#### **VENDOR CREDITS**

- Overview - Vendor Credits
- Basic Functions in Vendor Credits
- Functions in Vendor Credits
- Manage Vendor Credits
- Other Actions for Vendor Credits
- Vendor Credit Preferences

#### **TRANSACTION APPROVAL**

- Transaction Approval - Overview
- Enable Transaction Approval
- Notification Preferences
- Transaction Approval Workflow
- Users and Roles
- Manage Approvals

#### **ACCOUNTANT**

- Overview - Accountant



- Manual Journals
- Journal Templates
- Budgets
- Bulk Update
- Recurring Journals
- Base Currency Adjustment
- Sub Accounts
- Chart of Accounts
- Transaction Locking
- Accountant Preferences
- Manage Clients

#### **IMPORT & EXPORT**

- Overview
- Importing Data
- Exporting Data
- Backup Your Data

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