FUTURE PROOF LEARNING - NEP ALIGNED
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CERTIFICATE IN ZOHO BOOKS

DURATION: 60 Hours
TOTAL CREDITS: 2

COURSE SYLLABUS

Objective

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

- 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

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

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Course Outline

Course Name:	CERTIFICATE IN ZOHO BOOKS	Duration:	60 H
Module	Topic	Duration.	Total Duration.
Module - I	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	

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Course in Detail

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

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- 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

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- 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

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- 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

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- 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

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- 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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