

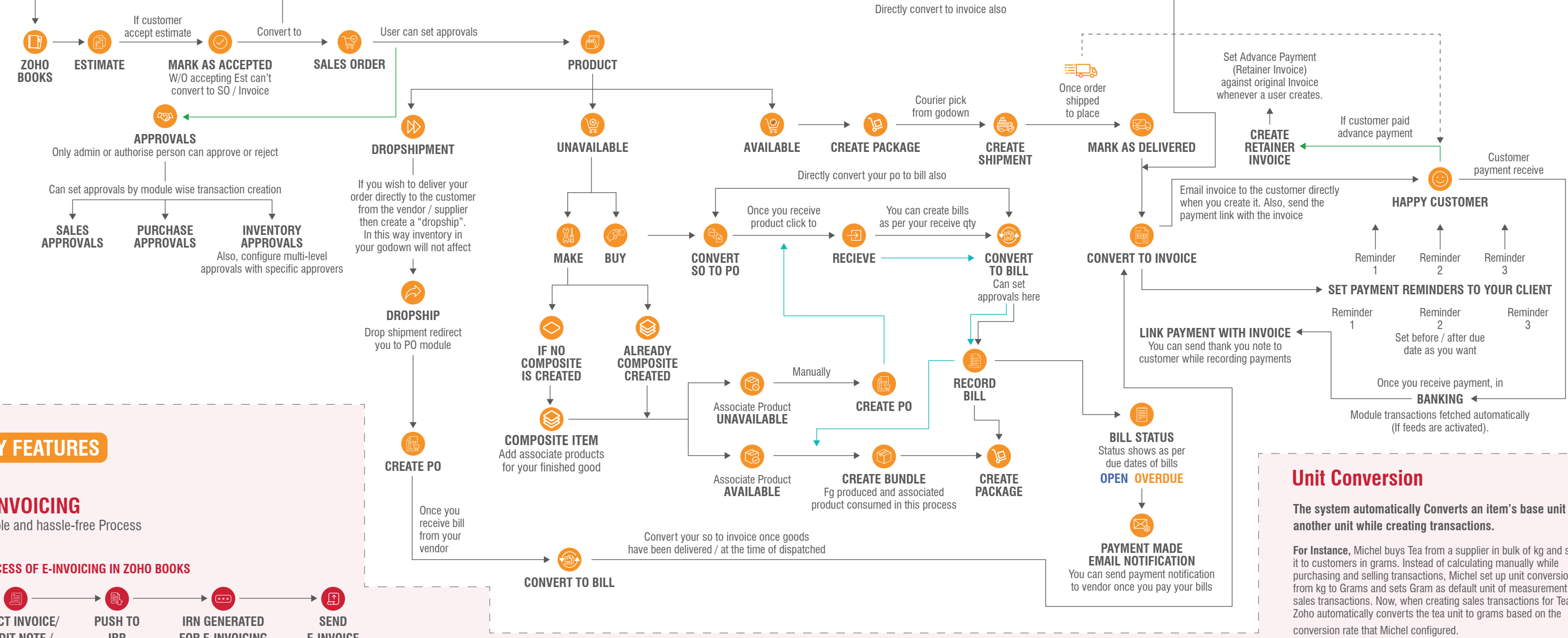
# Zoho Books Standard Process

## GST COMPLIANT ACCOUNTING SOFTWARE



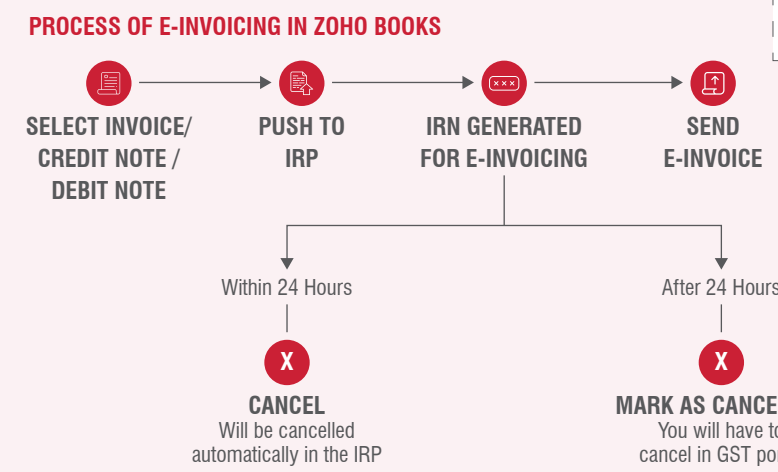
- Project Management
- e - Invoicing
- GST Filing
- Financial Reports
- Invoicing
- Inventory
- Online Payment

ZOHO CRM  
Integrating Customer Vendor S.O. / S.I P.O. / Bills



### KEY FEATURES

**E-INVOICING**  
Simple and hassle-free Process



### ZOHO BOOKS IN APP INTEGRATION

ZOHO Books can be integrated with ZOHO - Inventory, Expense, Analytics, People, Bigin, Campings, CRM, Projects, Mail, SalesIQ, Subscriptions, Desk, Cliq

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Note: We have covered only standard features of Zoho Books, there are more features & capabilities which is difficult to cover in this diagram.

### Client / Vendor Portal

- Functions on Client Portal**
- Accept Estimates
  - Pay invoices
  - Track payments Made
  - View Sales Order
  - Manage Time Sheets
  - Generate Statement of Accounts
  - Share Documents
- Functions on Vendor Portal**
- View Purchase Order
  - Accept and Decline Purchase Orders (For Vendors)
  - Manage Invoices
  - Track Payments Received
  - Generate Statement of Accounts

### Tasks

- To-do list for Zoho Books**
- User can Assign tasks user-wise and Set Priority or Due dates for the Tasks
  - Send Reminders via email or In-app notification to users
  - Tasks can be associated with transactions or view them in the transaction detail page

### Users and Roles

- A user is someone who has access to your Zoho Books Organization
- In Zoho Books, we have standard roles like Admin, staff, and timesheet staff
- You can create custom roles as per your requirement

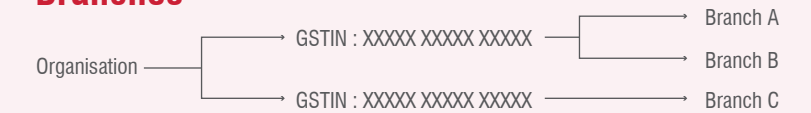
### Unit Conversion

The system automatically Converts an item's base unit to another unit while creating transactions.

**For Instance,** Michel buys Tea from a supplier in bulk of kg and sells it to customers in grams. Instead of calculating manually while purchasing and selling transactions, Michel set up unit conversions from kg to Grams and sets Gram as default unit of measurement for sales transactions. Now, when creating sales transactions for Tea, Zoho automatically converts the tea unit to grams based on the conversion rate that Michel configured.



### Branches

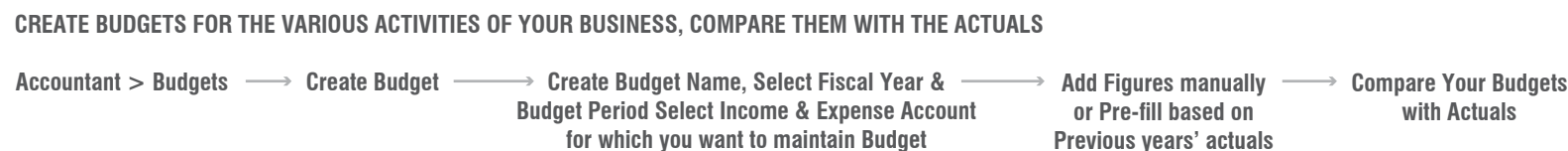
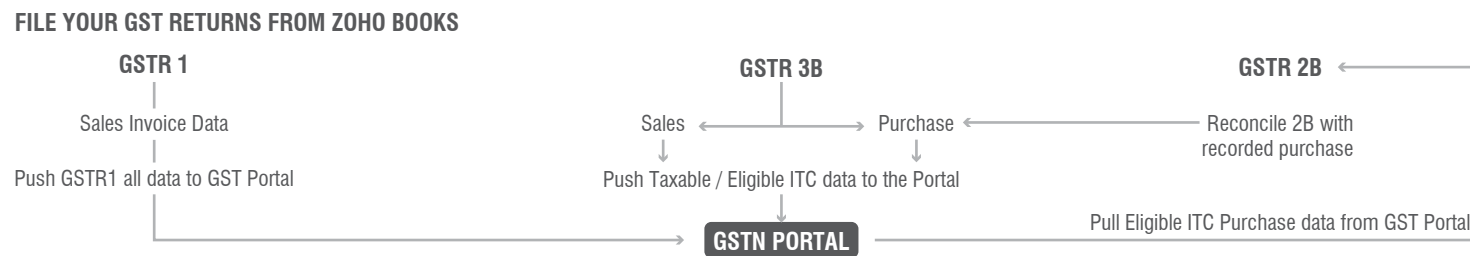
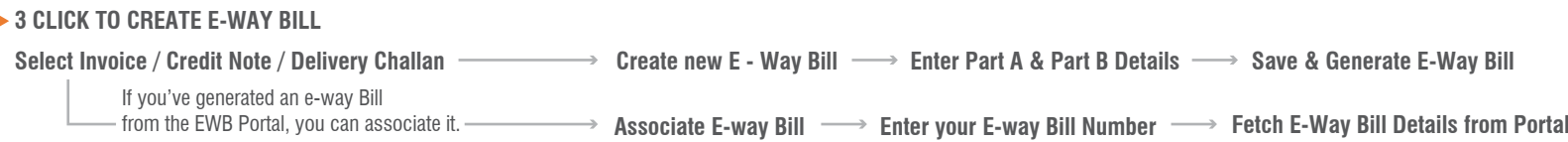
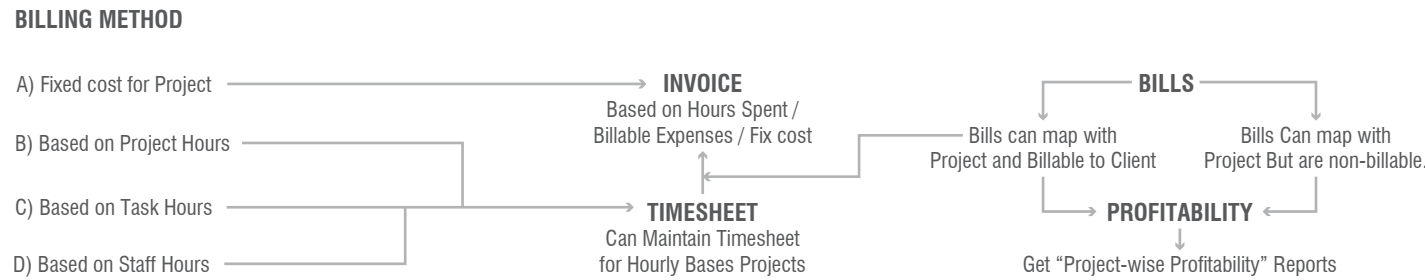
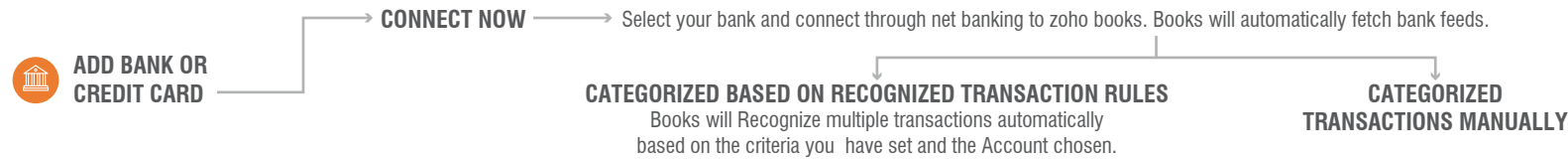
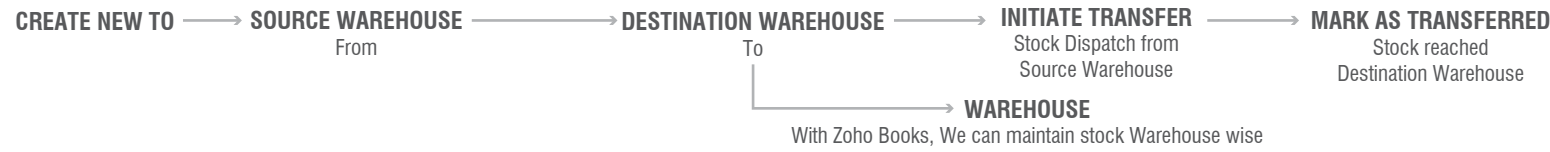


- Dashboard
- Items
- Items
- Composite Items
- Item Groups
- Inventory
- Adjustments
- Transfer Orders
- Banking
- Sales
- Purchases
- Time Tracking
- Projects
- Timesheet
- e-Way Bills
- GST Filing
- Accountant
- Manual Journals
- Bulk Update
- Currency Adjustments
- Chart of Accounts
- Budgets
- Transaction Locking
- Reports
- Documents

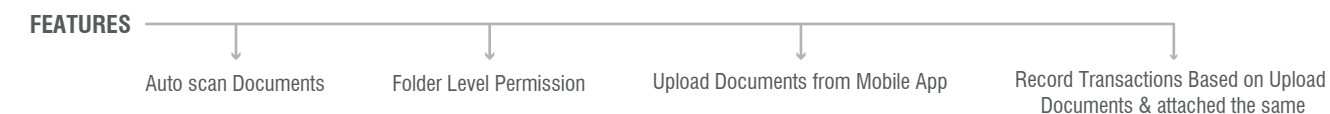
**DASHBOARD**  
IT WILL GIVE YOU A CLEAR PICTURE OF THE FINANCIAL HEALTH OF YOUR BUSINESS.

**QUANTITY ADJUSTMENT**  
Some of your Item Damaged, Stolen, or receive items from vendors as an incentive, In this case, the available stock has to be reduced/increased without creating sales/purchase transactions.

**VALUE ADJUSTMENT**  
In case of increase/decrease in stock value.



**ZOHO BOOKS PROVIDE STANDARD REPORTS RELATED TO BUSINESS FINANCIAL SUCH AS SALES, PURCHASE, INVENTORY, ETC.**  
Can see P&L report, balance sheet, cashflow, aging reports, inventory valuation, tax reports, etc. Also can customize, share, and export reports from zoho books.



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The Operating System for your Business

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SalesIQ	Backstage	COMMERCE	DESK	ASSIST
ZOHO LENS	MAIL	CLIQ	PROJECTS	SPRINTS
CONNECT	LEARN	TEAMINBOX	MEETING	WORKDRIVE
Writer	Sheet	Show	SIGN	NOTEBOOK
VAULT	BIGIN	INVOICE	EXPENSE	Checkout
Zoho Payroll	SUBSCRIPTIONS	INVENTORY	PEOPLE	RECRUIT
CREATOR	ANALYTICS	FLOW	DATAPREP	CONTRACTS