



Slide 1: Welcome Slide

Title: Welcome to the Training: Mastering Accounting with Zoho Books

- Duration: **2-Hour Live Session**
- Date & Time: **Friday, January 24, 2025 | 2:30 PM**
- Instructor: Timilehin Charles Ogungbemi
- Objective: **Learn how to streamline your accounting with Zoho Books**

Slide 2: Module 1 – Introduction to Zoho Books

Title: Module 1: Introduction to Zoho Books

- What is Zoho Books?
- The Zoho ecosystem: Integrations and tools
- Benefits of Zoho Books for small businesses
- Pricing plans: Free and premium options

Slide 3: Module 2 – Getting Started with Zoho Books

Title: Module 2: Getting Started with Zoho Books

- Creating your Zoho Books account
- Initial setup: Company details, preferences, and currency
- Navigating the Zoho Books interface
- Setting up user roles and permissions



Slide 4: Module 3 – Managing Invoices and Payments

Title: Module 3: Managing Invoices and Payments

- Designing and customizing professional invoices
- Automating invoicing and reminders
- Setting up payment gateways for transactions
- Tracking and managing overdue invoices

Slide 5: Module 4 – Expense Tracking and Vendor Management

Title: Module 4: Expense Tracking and Vendor Management

- Recording and categorizing business expenses
- Attaching receipts to expenses and automating entries
- Managing vendor contacts and creating purchase orders
- Processing bills and tracking payments

Slide 6: Module 5 – Banking and Reconciliation

Title: Module 5: Banking and Reconciliation

- Linking your bank accounts to Zoho Books
- Importing and categorizing bank transactions
- Reconciling your accounts for accuracy
- Automating bank feeds

Slide 7: Module 6 – Tax Management

Title: Module 6: Tax Management

- Setting up tax profiles (GST/VAT, sales tax)
- Applying tax rules to transactions
- Generating tax summary reports
- Filing tax returns through Zoho Books

Slide 8: Module 7 – Financial Reporting and Analytics

Title: Module 7: Financial Reporting and Analytics

- Understanding key financial statements:
 - Profit & Loss Statement
 - Balance Sheet
 - Cash Flow Statement
- Using dashboards for insights
- Exporting and sharing reports
- Leveraging advanced analytics



Slide 9: Q&A and Wrap-Up

Title: Q&A and Next Steps

- Recap of key takeaways from the session
- Resources for further learning
- Upcoming Zoho Books courses
- Contact details for support