

2020 Accounting

The zSource Way

INVOICES

- Convert Estimates & Sales Orders into Invoices
- Clone Existing Invoices
- Utilize Recurring Invoices Feature
- Use **ZOHO CRM** —Sales Team Creates Invoices
- Create Customers in **ZOHO CRM**
- Share Items with **ZOHO INVENTORY**
- Track Hours in **ZOHO PROJECTS**

PAYMENTS

- Integrate Payment Gateway—ACH/Credit Cards
- Customer Self-Service Portal—Documents/History
- Reduce Checks—Less Risk/Scans/Trips to Bank

BANK

- Turn Bank Feeds On
- Categorize/Match Transactions
- Frequent Soft Reconciliations
- Month End Final Reconciliation
- Attach PDF on **ZOHO WORKDRIVE** to Reconciliation
- Repeat process for Credit Cards

BILLS

- Turn Sales Orders into Purchase Orders
- Provide email to Vendors—Autofile PDFs
- Utilize Document Scanning—ZB/DOKKA
- Utilize Recurring Bills Feature
- Setup Bills on Autopay
- Pay using ACH or Credit Cards
- Eliminate Paper Checks

EXPENSES

- Use Expenses only for No-Bills Items
- Utilize Recurring Expense Feature
- Use **ZOHO EXPENSE** when out & about
- Eliminate Rework

Minimize bookkeeping—Maximize Analytics—Optimize Profits



Books



Workdrive



Expense



CRM



Inventory



Projects



Analytics



Authorized Partner

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2020 Accounting

The zSource Way



Bookkeeping



Automations & Integrations



Reconciliation & Reviews



Analytics & Optimization

Minimize bookkeeping—Maximize Analytics—Optimize Profits



Books



Workdrive



Expense



CRM



Inventory



Projects



Analytics



Authorized
Partner

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