



# ZOHO BILLING AGENDA



# Summary

**Duration: 3 Hours**

## About

The Zoho Billing training course is an online training program that is aimed at enabling businesses to set up their organization in Zoho Billing and learn best practices for using the software. Each module includes a concept explanation, demonstration, hands-on exercises, and a Q&A session.

## Who can attend?

This training is ideal for businesses who are looking to kick-start their CRM and digital transformation journey without worrying about additional implementation costs and a separate IT team to facilitate the migration.

## Training Delivery and Format:

This is a live training session during which we will walk you through the product module by module and center the session around a few highly prevalent use cases. The training duration is three hours, and will be delivered exclusively in English.



# Module 1 : Organization Set up

- Organization Profile
- Taxes and compliance
- Product/Item configuration
- Pricelists

# Module 2 : Billing Methods

- Product/Service Billing
- Project Based Billing
- Subscription Billing

# Module 3: Portal Customization and Notifications

- Customer Portal
- Email notifications
- Pdf Templates

# Module 4: Manage Receivables

- Reminders
- Dunning Management
- Custom Email Alerts



## Module 5: Billing Modes

- Calendar Billing
- Metered Billing
- Unbilled Charges
- Advance Billing Schedules

## Module 6: Platform Capabilities

- Customizable
- Extensible
- Scalable

## Module 7: Automation

- Webhooks
- Custom functions
- Rest API's

