

Case Study: Zoho Books Implementation, Training & Support for EHS Services

1. Client Overview

EHS Services operates in the field of **Environmental and Occupational Safety management**, providing professional consultation, technical expertise, and safety-related services to organizations.

The company focuses on delivering practical and cost-effective solutions while maintaining high standards of technical excellence and quality outcomes. EHS Services works with clients to address the changing regulatory and operational challenges associated with environmental and occupational safety management.

The organization also provides guidance to clients regarding environmental and occupational safety policies, planning, and information requirements.

To support its financial and accounting operations, **EVA Software Solutions** provided **Zoho Books implementation, training, and support** to EHS Services.

2. Business Challenges

As an organization providing professional environmental and occupational safety services, EHS Services manages various financial and accounting activities associated with its business operations.

The organization required a more structured approach to managing its accounting processes and gaining better visibility into its financial transactions.

Key requirements included:

- Centralized management of customer and vendor information
- Structured management of sales and purchase transactions
- Better management of quotations and invoices

Partner name: **EVA Software Solutions**.

Email ID/Contact- support@evasoftwaresolutions.com /+91 9930402590

<https://www.evasoftwaresolutions.com/index.html>



EVA Software Solutions



- Improved tracking of customer payments
- Management of vendor bills and payments
- Better organization of business expenses
- Centralized banking and accounting transactions
- Improved visibility into financial information
- Better understanding of Zoho Books among users
- Support for Zoho Books-related queries

3. Objectives

The primary objectives of the Zoho Books implementation and training were to:

- Establish a centralized accounting and financial management system
- Organize customer and vendor financial information
- Streamline quotation and invoicing processes
- Improve payment and outstanding tracking
- Structure purchase and vendor transactions
- Improve expense management
- Organize banking and accounting activities
- Provide better visibility through financial reports
- Train the EHS Services team on Zoho Books
- Provide post-implementation support and assistance

Partner name: **EVA Software Solutions.**

Email ID/Contact- support@evasoftwaresolutions.com /+91 9930402590

<https://www.evasoftwaresolutions.com/index.html>



EVA Software Solutions



4. Solution Implemented

EVA Software Solutions implemented and configured **Zoho Books** according to the business and accounting requirements of EHS Services.

The implementation focused on creating a structured financial management environment covering:

- Customer management
- Vendor management
- Quotations
- Sales transactions
- Invoices
- Customer payments
- Purchases
- Vendor bills
- Expenses
- Banking
- Accounting transactions
- Financial reporting

Along with the implementation, EVA Software Solutions provided practical user training and ongoing support to help the EHS Services team effectively use Zoho Books for their regular financial activities.

5. Key Features & Configuration

Partner name: **EVA Software Solutions**.

Email ID/Contact- support@evasoftwareolutions.com /+91 9930402590

<https://www.evasoftwareolutions.com/index.html>



EVA Software Solutions



Customer Management

- Customer creation and management
- Customer information management
- Customer transaction tracking
- Customer payment management
- Outstanding balance tracking

Vendor Management

- Vendor creation and management
- Vendor information management
- Purchase transaction management
- Vendor bill management
- Vendor payment tracking

Sales & Invoicing

- Quotation management
- Sales transaction management
- Invoice creation and management
- Customer payment recording
- Outstanding invoice tracking

Purchase Management

- Purchase transaction management
- Purchase Order management

Partner name: **EVA Software Solutions.**

Email ID/Contact- support@evasoftwaresolutions.com /+91 9930402590

<https://www.evasoftwaresolutions.com/index.html>



EVA Software Solutions



- Bill management
- Vendor payment management

Expense Management

- Recording business expenses
- Expense categorization
- Expense tracking
- Expense reporting

Banking & Accounting

- Bank account management
- Banking transactions
- Transaction categorization
- Accounting transactions
- Financial reports

6. Training & Knowledge Transfer

EVA Software Solutions provided practical Zoho Books training to the EHS Services team.

The training covered:

Zoho Books Basics

- Zoho Books navigation
- Organization settings

Partner name: **EVA Software Solutions.**

Email ID/Contact- support@evasoftwaresolutions.com /+91 9930402590

<https://www.evasoftwaresolutions.com/index.html>



EVA Software Solutions



- User management
- Basic accounting settings

Sales

- Customer creation
- Quotations
- Sales transactions
- Invoices
- Customer payments
- Outstanding balances

Purchases

- Vendor creation
- Purchase transactions
- Purchase Orders
- Bills
- Vendor payments

Expenses

- Expense creation
- Expense categorization
- Expense tracking

Banking & Accounting

- Bank account management

Partner name: **EVA Software Solutions.**

Email ID/Contact- support@evasoftwaresolutions.com /+91 9930402590

<https://www.evasoftwaresolutions.com/index.html>



EVA Software Solutions



- Banking transactions
- Transaction categorization
- Accounting transactions
- Relevant financial reports

Project

- Project management
- Project Tracking

Reports

- Sales reports
- Invoice reports
- Payment reports
- Customer outstanding reports
- Purchase reports
- Expense reports
- Financial reports

The training was conducted using practical scenarios to help the team understand and manage their regular accounting activities in Zoho Books.

7. Support Provided

Following the implementation and training, **EVA Software Solutions** provided ongoing support to assist the EHS Services team with Zoho Books-related queries and operational requirements.

Partner name: **EVA Software Solutions**.

Email ID/Contact- support@evasoftwaresolutions.com /+91 9930402590

<https://www.evasoftwaresolutions.com/index.html>



EVA Software Solutions



Support included:

- Resolving Zoho Books queries
- Guiding users on system functionality
- Assisting with accounting process-related questions
- Supporting transaction-related queries
- Clarifying report-related requirements
- Providing guidance on day-to-day Zoho Books usage

8. Results & Benefits

The Zoho Books implementation, training, and support helped **EHS Services** establish a more structured approach to managing its financial activities.

Key benefits include:

- Centralized financial information
- Better customer and vendor management
- More structured invoicing processes
- Improved payment tracking
- Better purchase and bill management
- Improved expense tracking
- Better organization of banking transactions
- Improved financial reporting visibility
- Increased user understanding of Zoho Books

Partner name: **EVA Software Solutions.**

Email ID/Contact- support@evasoftwaresolutions.com /+91 9930402590

<https://www.evasoftwaresolutions.com/index.html>



EVA Software Solutions



- Continued access to implementation and support assistance

9. Conclusion

The implementation of **Zoho Books** provided EHS Services with a centralized platform for managing its accounting and financial activities.

The solution helped organize customer and vendor management, sales, invoicing, purchases, payments, expenses, banking, and accounting processes within a structured digital environment.

Through practical training and ongoing support provided by **EVA Software Solutions**, the EHS Services team gained a better understanding of Zoho Books and its application to their day-to-day financial operations.

Overall, the project provided EHS Services with a structured accounting platform and the necessary knowledge and support to effectively manage its financial activities through Zoho Books.

Partner name: **EVA Software Solutions**.

Email ID/Contact- support@evasoftwaresolutions.com /+91 9930402590

<https://www.evasoftwaresolutions.com/index.html>