

PROJECT REPORT TEMPLATE

1. INTRODUCTION:

1.1 OVERVIEW:

Fresh Bites Catering, a catering service, utilizes Zoho books to manage sales, track inventory, and handle invoicing. They can generate professional invoices for clients and track expenses related to ingredients and supplies. Zoho books help them maintain accurate financial records and streamline their catering operations.

1.2 PURPOSE:

Zoho books' clean and simple dashboard gives you immediate, convenient insight into your financial health. An effective, user-friendly UI makes Zoho books easy to navigate. And also its have lots of features; It helps to,

- Item creation
- create GSTR-3B
- Banking transactions
- To create purchase order
- Purchase order to bills conversion
- Purchase bills creation
- Creation of vendor
- Payment made to the vendor
- Creation of customer
- To create a sales order
- Sales order to invoice conversion
- Create invoices
- Receipt making invoices
- To record small expenses
- To create Financial reports
 1. Balance sheet
 2. Profit and loss.

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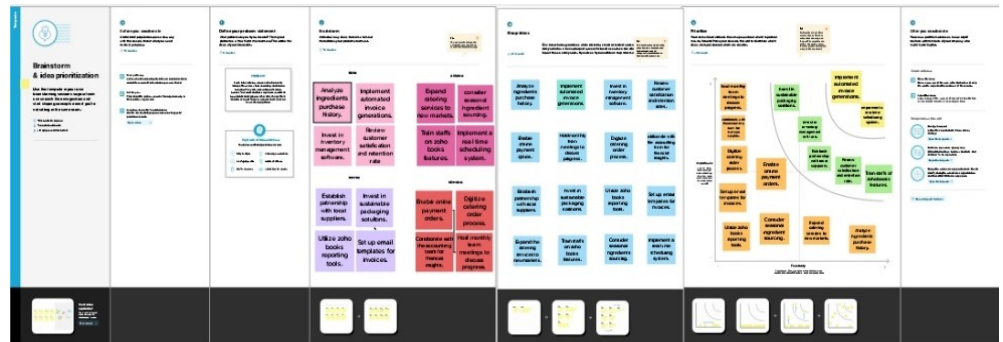
2.problem definition & Design thinking

2.1 Empathy Map



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2.2 ideation ana brainstorming map




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1


Define your problem statement
What problem are you trying to solve? Frame your problem as a How Might We statement. This will be the focus of your brainstorm.


🕒 5 minutes


PROBLEM
Fresh bites catering utilizes zoho books to manage their sales, track inventory and handle invoicing. They can generate professional invoices for clients and track expenses related to ingredients and supplies. zoho books helps them maintain accurate financial records and streamline their catering options.


**Key rules of brainstorming**
To run a smooth and productive session


 Stay on topic.

 Encourage wild ideas.

 Defer judgment.

 Listen to others.

 Go for volume.

 If possible, be visual.

2

Brainstorm
Write down any ideas that come to mind that address your problem statement.

🕒 10 minutes

ROSE

Analyze ingredients purchase history.

Implement automated invoice generations.

Invest in inventory management software.

Review customer satisfaction and retention rate

ASSANA

Expand catering services to new markets.

consider seasonal ingredient sourcing.

Train staffs on zoho books features.

Implement a real- time scheduling system.

SWETHA

Establish patnership with local suppliers.

Invest in sustainable packagging solutions.

Utilize zoho books reporting tools.

Set up email templates for invoices.



MOHANA

Enable online payment orders.

Digitize catering order process.

Colloborate with the accounting team for financial insights.

Hold monthly team meetings to discuss progress.



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3

Group ideas

🕒 20 minutes

Take turns sharing your ideas while clustering similar or related notes. Once sticky notes have been grouped, give each cluster a sentence-like label. If a cluster is bigger than six sticky notes, try and see if you can break it up into smaller groups.

TIP
Add customizable tags to sticky notes to make it easier to find, browse, organize, and categorize important ideas as themes within your mural.

Analyze ingredients purchase history.	Implement automated invoice generations.	Invest in inventory management software.	Review customer satisfaction and retention rates.
Enable online payment options.	Hold monthly team meetings to discuss progress.	Digitize catering order process.	Collaborate with the accounting team for financial insights.
Establish partnership with local suppliers.	Invest in sustainable packaging solutions.	Utilize zoho books reporting tools.	Set up email templates for invoices.
Expand the catering services to new markets.	Train staffs on zoho books features.	Consider seasonal ingredients sourcing.	Implement a real time scheduling system.



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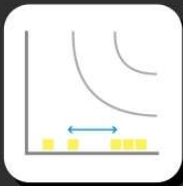
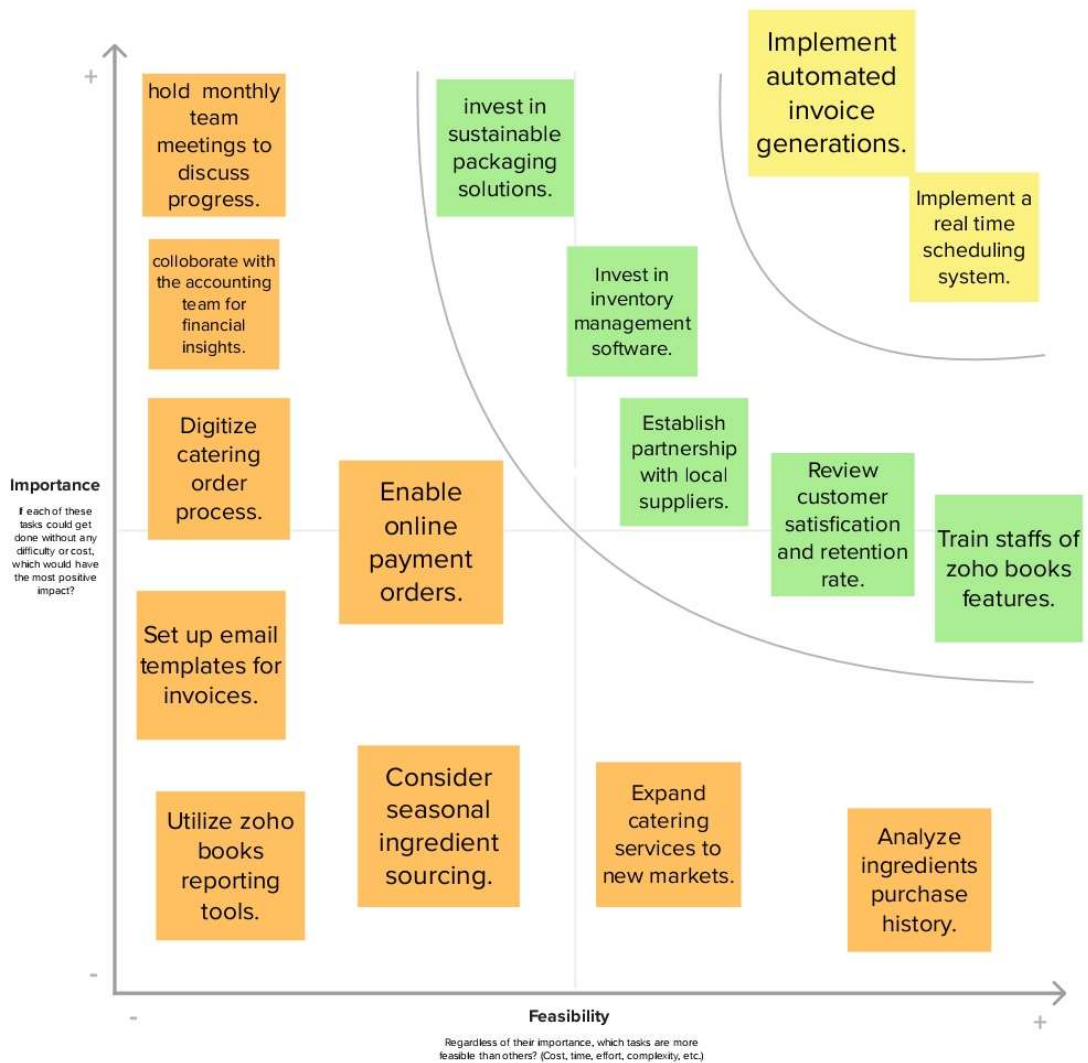
Prioritize

Your team should all be on the same page about what's important moving forward. Place your ideas on this grid to determine which ideas are important and which are feasible.

⌚ 20 minutes

TIP

Participants can use their cursors to point at where sticky notes should go on the grid. The facilitator can confirm the spot by using the laser pointer holding the H key on the keyboard.



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3.RESULTS:

PROFIT AND LOSS ACCOUNT:

Fresh Bites Catering

Profit and Loss

Basis: Accrual

From 01/04/2023 To 31/03/2024

Account	Total
Operating Income	
Sales	8,00,000.00
Total for Operating Income	8,00,000.00
Cost of Goods Sold	
Cost of Goods Sold	1,10,000.00
Materials	1,00,000.00
Total for Cost of Goods Sold	2,10,000.00
Gross Profit	5,90,000.00
Operating Expense	
Rent Expense	50,000.00
Salaries and Employee Wages	2,00,000.00
Total for Operating Expense	2,50,000.00
Operating Profit	3,40,000.00
Non Operating Income	
Total for Non Operating Income	0.00
Non Operating Expense	
petty cash withdrawal	5,000.00
Total for Non Operating Expense	5,000.00
Net Profit/Loss	3,35,000.00

**Amount is displayed in your base currency INR

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BALANCE SHEET:

Fresh Bites Catering	
Balance Sheet	
Basis: Accrual	
As of 31/03/2024	
Account	Total
Assets	
Current Assets	
Cash	
Petty Cash	5,000.00
Total for Cash	5,000.00
Bank	
ICICI Bank-001	6,53,500.00
Total for Bank	6,53,500.00
Other current assets	
Input Tax Credits	0.00
Input CGST	8,250.00
Input SGST	8,250.00
Total for Input Tax Credits	16,500.00
Total for Other current assets	16,500.00
Total for Current Assets	6,75,000.00
Total for Assets	6,75,000.00
Liabilities & Equities	
Liabilities	
Current Liabilities	
Salary payable	2,00,000.00
GST Payable	0.00
Output CGST	20,000.00
Output SGST	20,000.00
Total for GST Payable	40,000.00
Total for Current Liabilities	2,40,000.00
Total for Liabilities	2,40,000.00
Equities	
Owner's Equity	1,00,000.00
Current Year Earnings	3,35,000.00
Total for Equities	4,35,000.00
Total for Liabilities & Equities	6,75,000.00

**Amount is displayed in your base currency INR

SEE IT IS EASY TO PREPARE THE FINAL ACCOUNTS OF OUR FRESH BITES CATERING WITHOUT ANY NEGLIGENCE. IT IS A CLOUD BASED SOFTWARE SO WE CAN USE IT **ANYTIME AT ANYWHERE.**

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4. ADVANTAGES AND DISADVANTAGES

ADVANTAGES:

- INVOICING AND BILLING
- ONLINE PAYMENTS
- EXPENSE TRACKING
- INVENTORY MANAGEMENT
- BANK RECONCILIATION
- PROJECT MANAGEMENT AND TIME MANAGEMENT
- REPORT GENERATION
- REDUCE OVERALL COSTS
- MINIMIZES DATA LOST

DISADVANTAGES:

- ZOHO REQUIRES CODING ABILITIES TO MAKE THE MOST OF ITS AUTOMATION FEATURES, WHICH MAY BE CHALLENGING FOR BUSINESS OWNERS WHO ARE NOT TECH-SAVVY.
- THE GAP IN THE NUMBER OF MONTHLY TRANSACTIONS AND USERS MAY DISSUADE HIGH-VOLUME, EMPLOYEE-HEAVY BUSINESS FROM USING THE SOFTWARE.

5.APPLICATIONS:

- AFFORDABLE PRICING PLANS
- SECURITY
- MANAGE DOCUMENT SEAMLESSLY
- RELIABILITY
- EFFORTLESS SETUP AND IMPORT
- CUSTOMISE YOUR TEMPLATE

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6. CONCLUSION:

FRESH BITES CATERING IS A WELL-GOING BUSINESS. WE SELL ALL THE FOODS WITH LOVE AND AFFORDABLE PRICE. WE USE ZOHO BOOKS TO MAINTAIN OUR ACCOUNTS. WE ENTER EVERY TRANSACTION AND MAKE PAYMENTS TO VENDORS WITHOUT ANY DELAY. IT IS ALSO IN CURRENT TREND SO WE DON'T CARE ABOUT THE GST AND OTHER CURRENT TAXES. WE ALSO DO THE TRANSACTIONS AT **ANY TIME ANYWHERE**.

7. FUTURE SCOPE:

ZOHO BOOKS HAS MANY FEATURES IT WILL TELL US HOW THE FUTURE IS

- YOU CAN NOW APPLY TCS IN VENDOR CREDIT TRANSACTIONS.
- WE NOW HAVE A DEDICATED TAB FOR ANNOUNCEMENTS FROM ZOHO BOOKS SO YOU DON'T MISS OUT ON ANY IMPORTANT NEWS ABOUT EVENTS, UPDATES OF OUR CATERING SERVICE
- DISASSOCIATE SALES ORDERS FROM VOID INVOICES
- INTRODUCING SIGNALS
- PURCHASE BY CATEGORY REPORTS