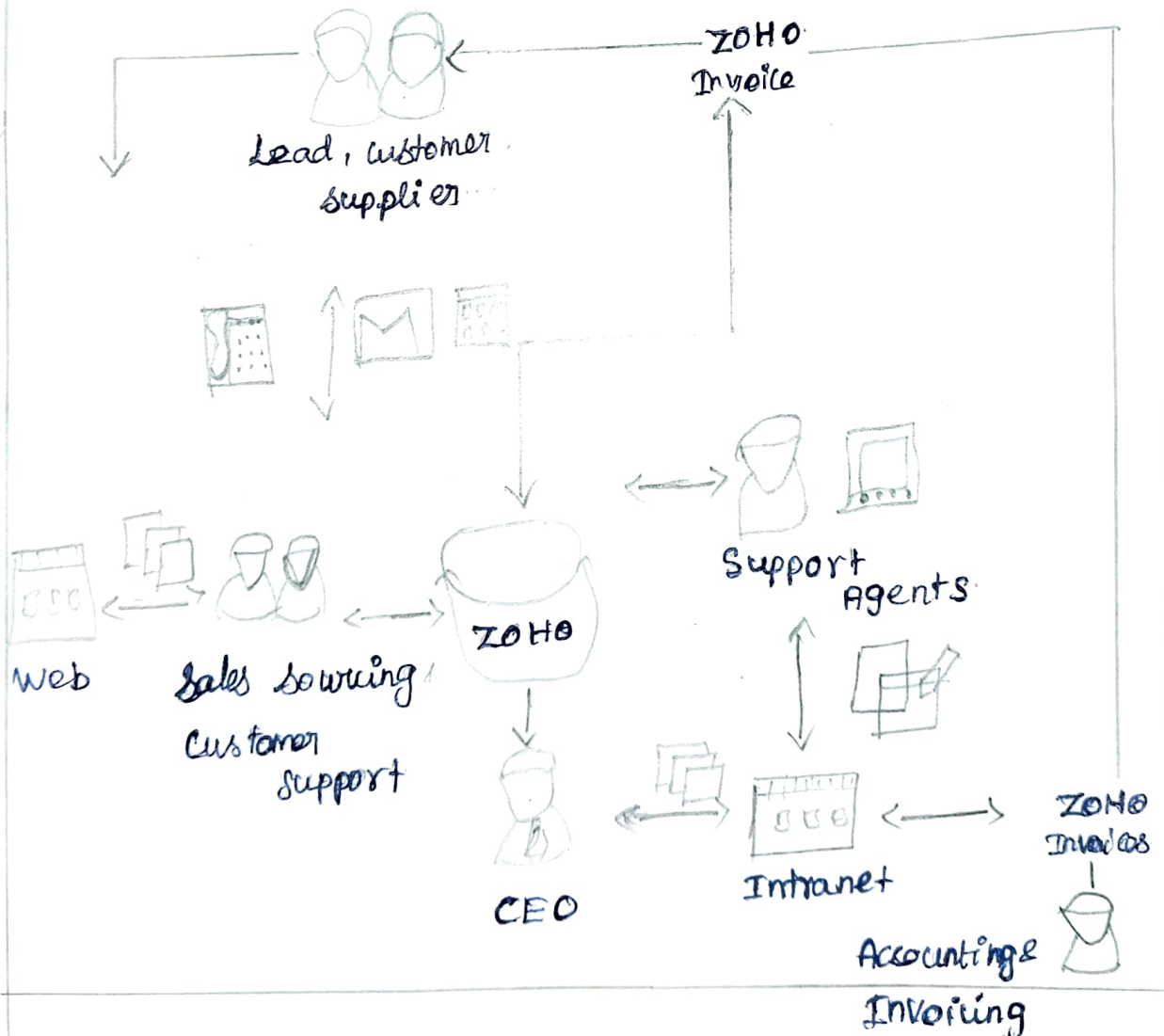


Preparation and Maintenance of ZOHO Books for HealthHub Medical clinic

Health Hub Medical clinic, a healthcare facility relies on ZOHO Books to manage patient billing and invoicing. They can track medical service fees, manage insurance payments and generate statements for patients. ZOHO Books helps them maintain financial transparency and ensures efficient billing processes.



Project Flow:

To accomplish this we have to complete all the activities listed below.

Set up your account:

Sign up for a Zoho Books account and log in

Introduction

Let's get started.

Services:

Creation

Review

Vendors

Vendor Creation

Review vendors list and details

Purchases:

Purchase order creation (PO)

PO to Bill Conversion

Purchase Bills Creation

Payment Marking to purchase Bills.

Customers:-

Customer Creation

Review customer list and details

Sales:-

Sales order creation (SO)

SO to Invoice convention.

Sale invoice creation

Receipt marking to Sale invoice

Banking:-

Adding Bank Account

New Accounts & Ledgers

Creation of New accounts & ledgers

Journal Entries:-

Recording Journal Entries.

Expenses:-

Recording Expense Bills.

Bank Transactions:-

Recording Bank Transactions

Financial Reports:-

Balance sheet

profit and Loss

GSTR-3B

TDS Reports.

Journal Reports

Accounts Receivables

Account payables.

Milestone 1: set up your account

Activity 1: sign up for a Zoho Books account and

Login

Click on the link to create your Zoho Books account <https://www.zoho.com/in/books/signup/>

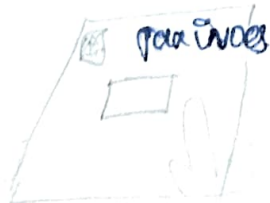


Zoho Books

Did you know?

The GST Council has made e-Invoicing mandatory for businesses with a turnover of ₹5 crore and above from 1 August, 2023. Zoho Books is here to help

Reach out to Support, India @ZohoBooks.com for more info



Already have a Zoho account? sign up

Experience premium plan for 14 days

- ☐ company name
- ☐ Email Address
- ☒ +91 mobile Number
- ☐ password
- ☐ India
- ☐ Telangana

your data will be in India data center

☐ I agree to the Terms of service and privacy policy

or sign in using or or

To sign up for Zoho Books

click on the above link
It will navigate to Zoho Books portal as shown in the above picture.

Enter your organisation details.

click create account
After signing up for Zoho Books you'll receive an email through which you can verify your account.

Go to your registered email address and click the link received in your email for verification

Enter your organisation details in the page you are redirected and click Get started.

Eg GSTIN: 33AAAAA0000A15
Z

Zoho Books

Zoho Books is your end-to-end online accounting Software

Organization Name

Zylker

Business Location

State/Union Territory

India

Maharashtra

Add organization address.

Regional Settings.

Time Zone

GMT 5:30 India Standard Time (Asia/Kolkata)

Currency

Language

INR-Indian Rupee

English

My business is registered for GST.

xxxxxxxxxxxxxx.

Get started.


Activity 2: Introduction:

Before we get into the specifics see where you'll find what.

Introduction:

The Navigation Panel on the left-hand side lists all the modules of Zoho Books.

Get into the sales tab and the purchases tab to manage quotes, invoices, expenses, bills, and more.

The quick create button  by the respective modules is the shortcut to create new transaction.

The quick create option can be used to create a transaction on the fly from any where in Zoho Books.

clicking on the Recent Activities option will display a list of most recent transactions you have created out in your organization.

use the search Activities option will display a list of bar to quickly find a specific transaction, contact item or more.

The Notification section will notify you of any customer activity on the customer portal as well as announcements from the Zoho Books team.

click on the settings icon to manage your organization profile, users, subscriptions and more.

Books

Search (customer)

Trial expires 13 days Sub.

Health Hub

Home

Items

Sales

Purchases

Time Tracking

e-way Bills

GST Filing

+ accountant

Reports

Documents

Payroll

<

Hello Health Hub medical clinic

Dashboard

Ordering started

Patient update

Looking for a product overview?

Join our daily webinar and get all your questions answered live!

Available in English & Hindi

Register Now

Total Receivables 7 New

Total Payables 7 New

Total Unpaid Invoices 70.00

Total Unpaid Bills 70.00

Current 70.00

Overdue 70.00

Current 70.00

Overdue 70.00

Cash Flow (1)

5k

4k

This Fiscal year

Cash as on 1/04/2023

70.00

Contact Support

Activity 3: Lets get started:-

Lots Assume Health Hub Medical Clinic is offering below list of various services:-

1. General medical consultation Rs 500/- per consultation.

2. X-rays scanning Rs. 1000/- per scan

3. preventive Health checkup Rs 5000/- per

person.

Also it purchases the below list of products for the daily operational use:-

1. pharmaceuticals Rs 1000/- per Box.

2. Medical supplies Rs 2000/- Per Box.

3. X-ray films Rs 5000/- Per Sheet.

Output GST @ 18% is applicable for all the above service and products.

Milestone 2: Service Creation:-Activity 1: Creation:-

To create the above both service and purchase items in Books go to Items from the Navigation panel and click on "+New" Button. and give the respective fields such as.

Item Name .

units (eg. Hrs)

SAC Code of the Item (Eg. 999312)

Tax Rate.

After providing all the required details
Click on save and add the next item as per the
Given services list > click save to add the item.

Books	2 A Search of Items	Trial 21st Sep 2020	AA 0 H HMC	6 10-11
<input checked="" type="checkbox"/> Home	New Item			✓
<input type="checkbox"/> Items	Types <input type="radio"/> Goods <input checked="" type="radio"/> Services			
<input type="checkbox"/> Banking	Name : General medical consultation			
<input type="checkbox"/> Sales	Unit :			✓
<input type="checkbox"/> purchases	SAC : 999312			✓
<input type="checkbox"/> Time Tracking	Tax			✓
<input type="checkbox"/> e-way Bills	Preference : Taxable			
<input type="checkbox"/> GST Filling	Sale Information			<input type="checkbox"/> purchase information
<input type="checkbox"/> Accountant	Selling price INR 500			last prices INR.
<input type="checkbox"/> Reports	Account Sales			Account last of goods Sold
<input type="checkbox"/> payments	Description <input type="text"/>			Description : <input type="text"/>
<input type="checkbox"/> payoil	<input type="button" value="Save"/> <input type="button" value="Cancel"/>			preferaxal version : <input type="text"/>

Activity 2: Review of Items after Addition:-

Books	Search of Items	Real expires today	Subs	AP	Item	Rate
Home	Active items					
Home	Name	Description	Rate	Unit	Purchase Rate	
Banking	X-ray films		₹ 0.00	PCG	₹ 500.00	
Sales	medical supplies		0	box	₹ 2000.00	
Purchases	pharmaceuticals		0	box	₹ 1000.00	
Time Tracking	preventive health Checkup		₹ 5000.00		0	
E-way Bills	X-rays scanning		₹ 1000.00		0	
GST Filing	General medical consultation		₹ 500.00		0	
Accountant						
Reports						
Documents						
Payroll						

Module 3: Vendors

Activity 1: Vendors Creation:

The following are the list of vendors from which various products and service are purchased:-

1. Mega pharmaceuticals (GST registered)
2. Medline Industries (GST registered)
3. Spectrum Radiography Supplies (Non GST)

Now to create vendors in books from navigation panel go to > vendors > create New vendors and.

add the respective field & click on save.

Books

A Search of vendor

Trial Expires 13 days
Sub ID: 10 H H M C

- Home
- Items
- Banking
- Sales
- Purchase
- Vendors
- Expenses
- Recurring Expenses
- Purchase orders
- Bills
- Payment made
- Recurring Bills
- Vendor Credits
- Time Tracking
- E-way Bills

New vendor

Primary contact :
Company name : Mega pharmaceuticals pvt Ltd
Vendor display name : Mega pharmaceuticals pvt Ltd

Vendor Email :
Vendor phone :

Other details : address contact persons Bank details Customer Permitted Re marks

GST Treatment : Registered Business - Regular

GST/VIN :

Gst taxpayer details

PAN :

Source of supply : TN - Tamil Nadu