

Zoho-Led Practice Automation: Building an Integrated SMP Ecosystem

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By CA Lakshmi Nalledath Palat

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- Scattered records
- Multiple Compliance Portals and formats
- Limited Resources
- Version Control Issues
- Data Security Concerns
- Retrieval Delays

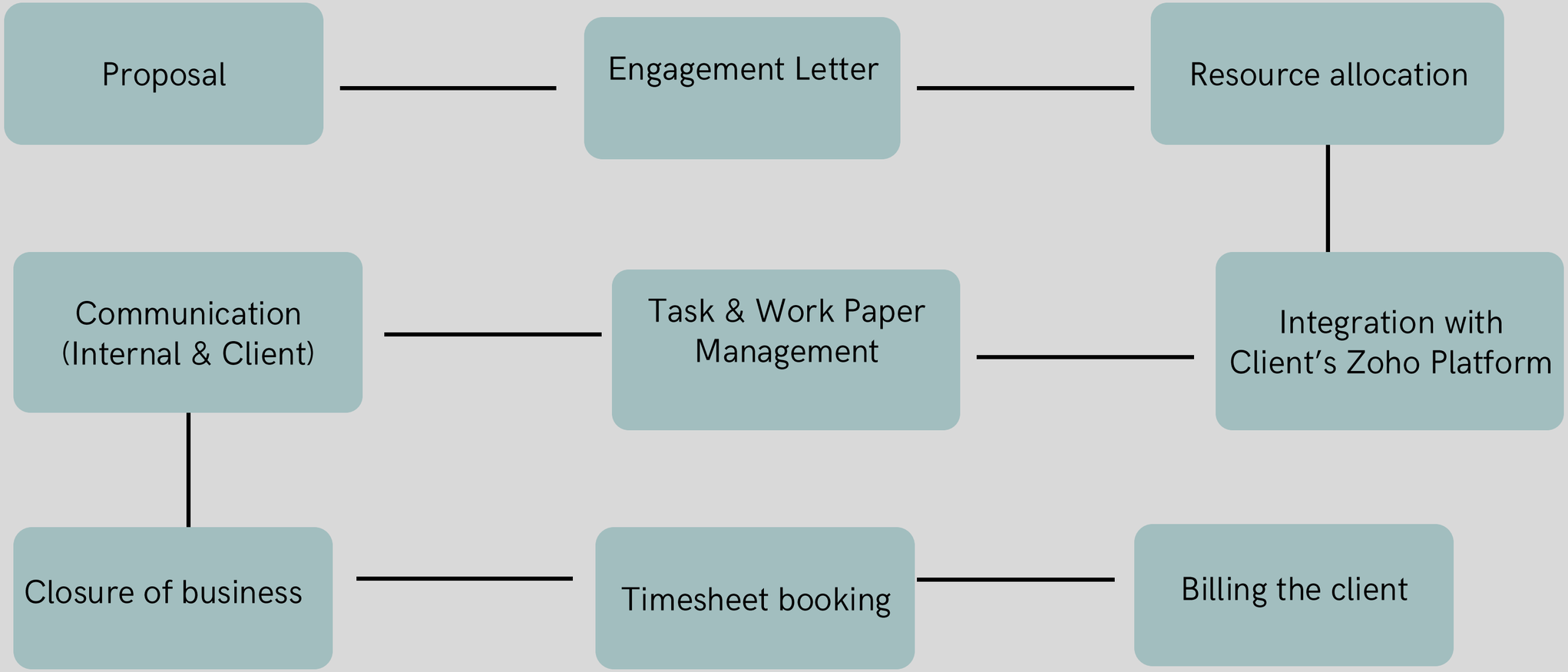


Zoho

Practice

- Practice management software for accounting firms.
- Unified platform that helps firms to manage clients effectively, simplifies tasks, enhances efficiency and elevates service quality through financial insights and timely communication.

Practice Management Process Flow



Key Capabilities



- Integrated client administration system
- End-to-end Zoho Finance integration
- Seamless real-time collaboration with clients
- Seamless task coordination
- Encrypted document sharing
- Accurate and timely regulatory reminders
- Optimized timesheets with seamless billing
- A scalable solution that adapts to both small firms and large organizations.
- Role-based access for staff members



- Zoho account is mandatory for practitioner login.
- Firm details, team members, and roles must be configured during Zoho Practice registration.
- Clients should provide access to their Zoho Books/Zoho Finance suite (if they are already using Zoho apps) for seamless integration of data.
- Role based access for team members should be created to ensure data security.
- GSTIN, PAN, and other statutory details of clients should be updated in the system for compliance workflows.

Client tips for smoother collaboration



- Upload supporting documents for expenses and income in Zoho Books, Zoho Inventory, Zoho Expense etc.
- Upload bank statements in Zoho books while doing the bank reconciliation.
- Attach TDS certificates from customers in Zoho books.
- Attach customer and vendor agreements in Zoho Books/CRM.

Support for Non-Zoho Clients



- **Client & task Management** - Create client, assigning tasks, time sheet booking etc.
- **Documentation** – Track requests Managing proposals, Engagement letter, NOC, agreements, work paper management etc.
- **Audit support** -manage workflows, deadlines, and compliance tasks even when source data is imported manually or comes from external software.

Thanks

CA Lakshmi Nalledath Palat
lakshminp@lnpassociates.net
+91 9840430362