

Modernising Financial Management with Zoho Books

CUSTOMER OVERVIEW

Triangular Infosolutions Pvt. Ltd. is a Pune-based services company with approximately 150 employees. The organisation previously used Tally for its accounting and financial management activities. However, limitations in automated payment reminders and workflow automation created a need for a more streamlined accounting solution. To address these challenges, the company implemented Zoho Books to improve financial process management and introduce greater automation into its accounting operations.

Locations
Pune, India

Industry
IT Services and Consulting

Application Replaced
Tally

Product Implemented
Zoho Books

Project
Zoho Books Implementation & Accounting Automation

Employee Count
150

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BUSINESS CHALLENGES

1. Limited Payment Reminder Automation: Tally lacked the required automated reminder capabilities, making timely follow-ups for pending payments challenging.

2. Manual Follow-up Activities: Managing payment reminders and follow-up activities required additional manual effort, creating operational inefficiencies.

3. Lack of Workflow Automation: Existing accounting processes lacked the required workflow automation capabilities to streamline repetitive financial activities.

4. Limited Process Efficiency: Dependence on manual activities made it difficult to establish a consistent and streamlined approach to routine accounting operations.

5. Need for Automated Financial Processes: The organisation required a more advanced accounting platform to improve process automation, reduce repetitive work, and streamline financial management.



SOLUTION IMPLEMENTED

AGSuite Technologies implemented Zoho Books to modernise Triangular Infosolutions' accounting environment by introducing automated payment reminders and workflow capabilities.



1. Zoho Books Implementation: Migrated the accounting process from Tally to Zoho Books, providing a dedicated cloud-based accounting platform for managing financial activities.

2. Automated Payment Reminders: Enabled automated reminder capabilities to support timely follow-ups on pending payments and reduce dependency on manual reminders.

3. Workflow Automation: Utilised Zoho Books workflow automation capabilities to streamline repetitive accounting activities and establish more structured financial processes.

4. Streamlined Accounting Operations: Established a centralised accounting environment to improve the management of routine financial activities.

5. Reduced Manual Intervention: Introduced automation into relevant accounting processes to minimise repetitive manual tasks and improve operational efficiency.

6. Improved Financial Process Management: Configured the accounting platform to address existing process limitations and support more organised financial operations.

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BUSINESS IMPACT/KEY BENEFITS

- **Automated Payment Reminders:** Simplified payment follow-ups through automated reminders.
- **Reduced Manual Effort:** Minimized repetitive activities associated with payment reminders and accounting workflows.
- **Improved Workflow Efficiency:** Streamlined routine accounting processes through workflow automation.
- **Better Process Management:** Established a more structured approach to managing financial activities.
- **Centralised Accounting:** Transitioned from Tally to a unified Zoho Books environment.
- **Enhanced Operational Efficiency:** Introduced automation to support smoother accounting operations.

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WHY AGSUITE TECHNOLOGIES

AGSuite Technologies delivered a tailored Zoho Books implementation aligned with Triangular Infosolutions' accounting and automation requirements. By addressing the limitations of the existing Tally environment and introducing automated payment reminders and workflow capabilities, AGSuite helped establish a more streamlined financial management system. The implementation focused on reducing manual intervention, improving process consistency, and enabling more efficient accounting operations through Zoho Books.

CONCLUSION

The implementation of Zoho Books enabled Triangular Infosolutions Pvt. Ltd. to move beyond the limitations of its existing Tally-based accounting environment towards a more automated financial management platform. With automated payment reminders and workflow capabilities, the organisation established a structured approach to handling routine accounting activities, reducing manual follow-up efforts, and improving overall process efficiency.

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