

Enterprise Systems

ERP SOFTWARE

Zoho, Sage, NetSuite, Accounting to CRM to Analytics.

ZOHO ONE PLATFORM

Eight years of experience working with the entire suite of applications. Zoho Authorized Partner. Zoho Finance Advisor. Zoho Analytics Certified.

THIRD PARTY & CUSTOM APPS

Integration with third-party applications as well as custom apps.

AI Optimization

IMPLEMENTATION

Kickstart AI in the SMB environment.

AUTOMATION OF ROUTINE

Identify repetitive, high-volume tasks suitable for automation.

PROBLEM SOLVING

Partner AI to solve complex issues and assist with execution.

Financial Solutions

ACCOUNTING SOFTWARE

QuickBooks, Sage, NetSuite and Zoho Financial Suite.

ANALYTICS

Tableau and Zoho Analytics for in-depth understanding and development of metrics to run a business.

NON-FINANCIAL INTEGRATION

Integration of apps that share data with finance such as CRM, Project Software, Support Apps, Digital Signing & more.

Project Management

PMP-CERTIFIED

Highly experienced project manager for over four decades.

CSM AGILE

Adaptive agile methodology applied to systems projects.

STANFORD ADVANCED

Program management, project portfolios, strategy, risk management.

Additional Background

ENTREPRENEURSHIP | MANAGEMENT ADVISORY | COACHING | TRAINING | STRATEGY CONSULTANT



jgoldfarb@zsource.global



1 415 504 1200

