



Says

What have we heard them say?
What can we imagine them saying?



Thinks

What are their wants, needs, hopes, and dreams?
What other thoughts might influence their behavior?



Persona’s name
Short summary of the persona

Take advantage of any training materials, tutorials, or customer support resources offered by Zoho Books to enhance your knowledge and troubleshoot issues.

Keep an eye on updates and new features in Zoho Books to make the most of its capabilities and stay efficient.

Ensure that you regularly back up your Zoho Books data and adhere to best practices for data security to prevent any data loss or breaches.

Utilize bank feeds to automatically import your bank and credit card transactions into Zoho Books, saving you time on data entry.

Zoho Books can integrate with other business tools you might be using, such as payment gateways or e-commerce platforms, to streamline data flow.

Regularly generate financial reports such as profit and loss statements, balance sheets, and cash flow statements to understand the financial health of your business.

Record all your sales transactions, whether cash or credit. This will help you keep track of your revenue and customer transactions.

Zoho Books can help you manage your tax obligations by automatically calculating taxes on invoices and generating tax reports.

If your sweet shop manages inventory, use Zoho Books to track stock levels, manage purchase orders, and update inventory quantities as products are sold.

Use Zoho Books to generate professional-looking invoices for your customers. You can customize templates, add your logo, and set up automated invoice reminders to improve payment collections.

Record all your business expenses in Zoho Books. You can even use the mobile app to capture receipts on the go and attach them to relevant transactions.

Regularly reconcile your bank and credit card statements with Zoho Books to ensure that your transactions are accurate and up-to-date.



Does

What behavior have we observed?
What can we imagine them doing?



Feels

What are their fears, frustrations, and anxieties?
What other feelings might influence their behavior?