



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?

Click the Quick create icon from the Invoices module (under Sales tab).

add or select the items (s) that you wish to invoice your clients

Fill the invoice fields in the New Invoice page.
Customer Name
Invoice number
Invoice Date

Add or Select the Item(s) that you wish to invoice your clients

Enter the Customer Notes& Terms &Conditions

Attach files such as images or documents toyour invoices and send it to your customers

Srimari.R
Vidhya,S
Yuvashri.J
Arasappan.S

Use the Search bar to quickly find a specific transaction,Contact, items or more

Click on the settings icon to manage your Oraanizations profile, users,Subcriptions and more

Drill the furthrr in Zoho BOOKS Usings Help and Webinars or contact support from the helps section

The Notifications Section will notify you of any customer portal as well as announcements from the zoho Books team

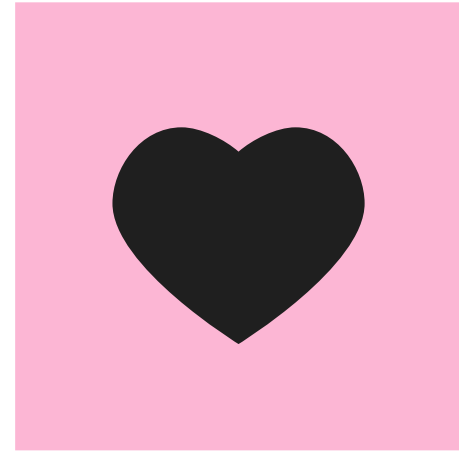
The Quick Create button by the respective modules is the shortcut to create new transactions

Get into the Sales tab and the Purchases tab to manage Quotes, invoices Expenses, Bill s, and more



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?