



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?

Record your daily transactions. This includes invoices, bills, payments, and expenses. You can manually enter your transactions, or you can import them from your bank statements or other accounting software.

• **Use the Zoho Books mobile app.** The Zoho Books app allows you to access your Zoho Books account from anywhere. This is helpful for recording transactions on the go and staying on top of your finances.

Generate financial reports. Zoho Books offers a variety of financial reports, such as balance sheets, income statements, and cash flow statements. You can use these reports to track your business performance and make informed decisions

Reconcile your bank and credit card statements. This is important to ensure that your Zoho Books records are accurate.

• **Automate as much as possible.** Zoho Books offers a variety of automation features that can save you time and effort. For example, you can set up automatic recurring invoices and bills.

Back up your Zoho Books data regularly. This is important to protect your data in case of a hardware failure or other disaster. Zoho Books offers a variety of backup options, including automatic backups and manual backups.



Use Zoho Books to track project expenses. You can create a separate project for each real estate transaction. This will allow you to track all of the expenses associated with each transaction, such as commissions, marketing costs, and title fees.

Use Zoho Books to handle invoicing. Zoho Books allows you to create custom invoices that include your company logo and branding. You can also send invoices electronically to your clients.

Use Zoho Books to manage subcontractor payments. You can add subcontractors as vendors in Zoho Books. This will allow you to easily create and send invoices to subcontractors, as well as track payments.

Use Zoho Books to generate financial reports. Zoho Books offers a variety of financial reports that can help you track your business performance. For example, you can generate reports to track your revenue, expenses, and profitability.

Create an account and set up your organization profile. This includes entering your company name, address, contact information, and tax settings.



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?