

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?

Hemapriya.S
Nagajothi.G
Prashanthi.R
Selvarani.R

Persona’s name

Short summary of
the persona

The Navigation
panel on the left
side lists all the
modules of
zoho books

Get into the Sales tab and
the Purchase tab to
manage quotes
,invoices,express,bills,and
more

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

The Quick Create
option can be used
to create a
transaction on the
fly from anywhere
in zoho books

Clicking on the
Recent Activites
option will display of
list of most recent
transaction you have
carried out in your
organisation

Use the Search bar to
quickly find a specific
transaction,contact,item
or more

The Notification
Section will notify you
of any customer
activity on the
customer portal as
well as announcement
from the zoho books
team

Click the Setting icon to
manage your organisation
profile,users,subscription
and more

Drill further in zoho
books using help
and webinars or
contact support
from the Help
section

Click the
Quick Create
icon from the
invoice
module

Choose your
preferred
Discount from
the option

Select additional
charge likeShipping
AddresanAdjustment

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?