



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?



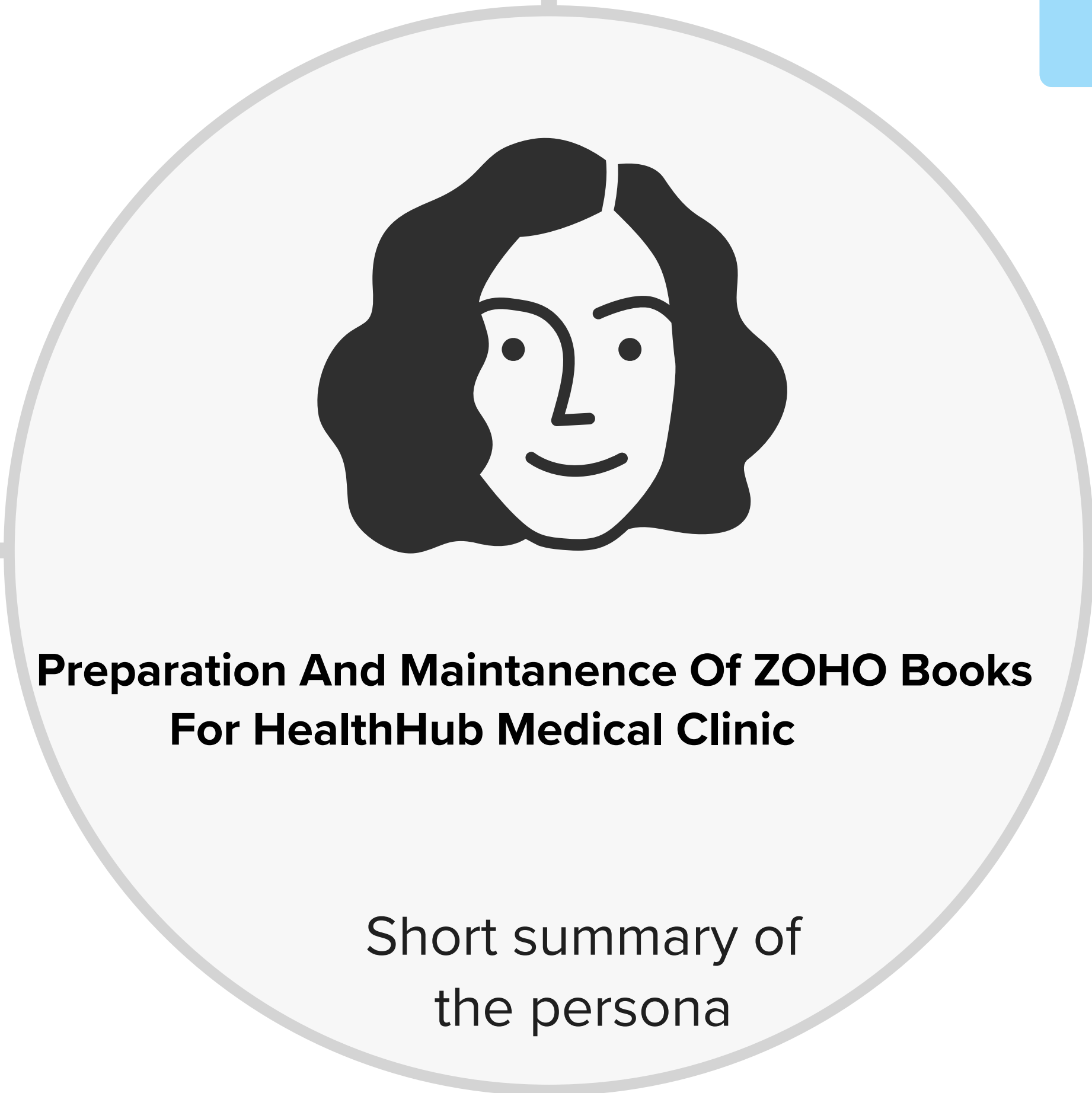
Feels

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



Does

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



• **Create a Zoho Books account.** You can choose a free plan or a paid plan, depending on your needs.

• **Set up your company information.** This includes your company name, address, contact information, and tax information.

1. **Add your staff members.** You can create user accounts for your staff members and assign them different roles and permissions.

• **Add your customers and vendors.** This includes your patients, insurance companies, and other businesses that you do business with.

• **Add your products and services.** This includes all the medical services that you offer to your patients.

• **Set up your chart of accounts.** This is a list of all the accounts that you will use to track your income and expenses.

• **Set up your payment methods.** This includes the different ways that your patients can pay for their services, such as cash, credit card, or insurance.

• **Enter all of your income and expenses.** This includes patient payments, insurance payments, and other expenses such as rent, utilities, and staff salaries.

• **Generate reports.** Zoho Books offers a variety of reports that can help you to track your financial performance. You can use these reports to make informed business decisions.

• **Create a system for entering patient payments.** This could involve having a dedicated staff member responsible for entering payments, or using a payment processing system that integrates with Zoho Books.

• **Set up recurring invoices for insurance companies.** This will save you time and ensure that your invoices are sent out on time.

• **Reconcile your bank accounts.** This will help to ensure that your Zoho Books records are accurate and up-to-date.