



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?

**Set up your organization profile.**  
This includes entering your company name, contact information, address, and tax settings.

**Customize your settings.** This includes setting your accounting preferences, such as your fiscal year and currency.

**Create your items and services.** This includes entering a description, price, and tax rate for each item or service.

**Add your customers and vendors.** You can do this manually or import them from a spreadsheet.

**Record all of your transactions.** This includes sales invoices, purchase bills, expenses, and payments.

**Create your bank accounts and credit cards.** This will allow you to connect your Zoho Books account to your bank and credit card accounts so that you can automatically import transactions.



Preparation and Maintenance of ZOHO Books for Dream Homes Realty

Short summary of the persona

**Review your reports regularly.** This will help you to track your income and expenses, and to identify any areas where you can improve your profitability.

**Use the recurring transactions feature.** This will save you time by automatically creating invoices and bills for your customers and vendors.

**Take advantage of the integrations.** Zoho Books integrates with a variety of other business software, such as CRM systems and e-commerce platforms. This can help you to streamline your workflow and save time.

**Set up alerts.** Zoho Books can send you alerts when certain events occur, such as when a new invoice is due or when a customer makes a payment.

**Use Zoho Books to manage your inventory.** This can help you track your inventory levels and ensure that you always have enough stock on hand.

**Use Zoho Books to track your customer interactions.** This can help you improve your customer service and identify opportunities to increase sales.



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?