

Says

What have we heard them say? What can we imagine them saying?

- 1. Set up your organization profile. This includes entering your company name, address, contact information, and other basic information.
- 2. **Define your chart of accounts.** This is a list of all the accounts that you will use to track your financial transactions.
- 3. Add your customers and vendors. You will need to create accounts for all of your customers and vendors in order to track your sales and expenses.
- 4. Link your bank accounts and credit cards. This will allow you to automatically import your transactions into Zoho Books.
- 5. Customize your settings. Zoho Books offers a variety of settings that you can customize to fit your specific business needs.

and professionally.

Being proactive and suggesting new

Keeping up with the latest trends and

Giving back to the community through

charitable work and sponsorships.

Building strong relationships with

clients and other stakeholders.

developments in their industry.

Investing in their employees'

professional development.

quality work.

ideas to clients.

- 1. Record your transactions regularly. This includes recording your sales, expenses, and other financial transactions.
- 2. Reconcile your bank accounts and credit cards. This will help to ensure that your Zoho Books records are accurate.
- 3. **Generate reports.** Zoho Books offers a variety of reports that you can use to track your business finances.
- 4. Review your account balances and financial performance. This will help you to make informed business decisions.

- Use projects to track billable hours and expenses. This will help you to accurately calculate project costs and monitor profitability.
- Use timesheets to track your employee time. This will help you to ensure that you are accurately tracking billable hours and expenses.
- Use the GST feature to track and report on **GST** transactions.
- Use the online payment gateways to accept payments from clients. This will make it easier for you to get paid quickly.
- Use the reports feature to generate reports on your sales, expenses, and other financial metrics. This will help you to track your business performance and make informed business decisions.



preparation and maintance of zoho books for bright Responding to client inquiries promptly idea consulting Meeting deadlines and delivering high-

Needs

- To have a reliable accounting system
- To be able to track their finances accurately
- To be able to generate reports on their business performance
- To be able to comply with their tax obligations

Thinks

What are their wants, needs, hopes, and dreams?

What other thoughts might influence their behavior?

To be successful in

clients with high-

To make a good living

To have a good work-

quality services

life balance

their business

To provide their

Wants

Their personal values

influence their behavior

Other thoughts that might

- Their beliefs about money
- Their risk tolerance
- Their financial goals
- Their relationships with others
- Their current life circumstances

Fears

- Failing their clients
- Not being able to keep up with the latest tax laws and regulations
- Making mistakes in their accounting records
- Being audited by the IRS
- Losing money due to fraud or theft

etting up and maintaining Zoho Books for the company. This includes creating the company's chart of accounts, adding customers and vendors, linking bank accounts and credit cards, and customizing

- Training Bright Ideas Consulting staff on how to use **Zoho Books.** This includes teaching them how to record transactions, reconcile accounts, and generate
- Providing ongoing support to Bright Ideas Consulting staff with Zoho Books. This includes answering questions, troubleshooting problems, and providing advice on best practices.
- Advising Bright Ideas Consulting on how to use Zoho Books to improve their business processes. This may include suggesting new ways to track expenses, generate reports, or manage inventory. • Helping Bright Ideas Consulting to comply with their tax obligations. This may include generating GST

reports, preparing for tax audits, or filing tax returns.

- Setting up and managing Zoho **Books projects to track billable hours** and expenses.
- Implementing Zoho Books timesheets to track employee time.
- Configuring the Zoho Books GST feature to track and report on GST transactions.
- Setting up online payment gateways to accept payments from clients.
- Creating custom reports to meet the specific needs of Bright Ideas Consulting.

Frustrations

- Dealing with complex accounting tasks
- Not having enough time to do their job properly
- Having to deal with difficult clients
- Having to work long hours
- Not being paid enough

Other feelings that might influence their behavior

- Stress: Stress can lead to a variety of negative emotions, such as anger, irritability, and anxiety. It can also make it difficult to
- focus and make sound decisions. • Overwhelm: When people feel overwhelmed, they may feel like they are losing control of their lives. This can lead to procrastination, withdrawal, and other negative behaviors.
- Self-doubt: Self-doubt can lead people to question their abilities and make them afraid to take risks. It can also make them more likely to make mistakes.



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?

