Southon
BUSINESS SOLUTIONS

Services Proposal

Experience & Working with me

PROFESSIONAL EXPERIENCE OVERVIEW

With a background in law, finance compliance and extensive experience in documentation and system setup across various sectors, I offer specialised Zanda Practice Management setup services specifically for health professionals.

My expertise is built on working directly with medical and health software providers, as well as collaborating with practices in Brisbane to implement and then optimise their Zanda Practice Management system and workflows.

TO FIND OUR MORE ABOUT ME AND A SHORT VIDEO INTRODUCTION CLICK LINK HERE

The Project

ZANDA PRACTICE MANAGEMENT SYSTEM SET UP & BROAD SCOPE OF WORK INCLUDES

- STRATEGY SESSION AND PLAN FOR YOUR ZANDA IMPLEMENTATION
- FULL SET SYSTEM SET UP
- PRACTICE OPERATIONS MANUAL
- FORMS
- PRACTICE SETTINGS FOR YOUR TEAM
- CLIENT PROFILE SET UP AND ANY CUSTOM FIELDS
- COMMUNICATION TEMPLATES SUCH AS EMAILS, SMS, LETTER TEMPLATES AND TELEHEALTH
- BILLING AND PAYMENT METHOD SET UP
- AUTOMATIONS

Project Breakdown

TASKS

PRACTICE SETUP

BUSINESS INFO, LOCATIONS, PRACTICE MANUAL, DATA IMPORT / EXPORT, INTAKE FORMS AND AGREEMENTS AND CONSENTS FOR DIGITAL SIGNATURE. SET UP OF CANCELIATION POLICY, PRIVACY AND SECURITY SET UP

TEAM SET UP

SET UP OF PRACTIONERS, USERS, AVAILABILTY

SCHEDULING

SET UP CALENDER DISPLAYS & APPOINTMENT FLAGS

COMMUNICATION METHODS

EMAIL, SMS AND LETTER TEMPLATES, AGREEMENT, COMMUNICATION OPTIONS, REMINDERS, FORMS & AUTOMATIONS

CLIENT SET UP

CLIENT TYPES, CLASSIFCATIONS, CUSTOM FIELDS, CONTACTS & TAGS

BILLING AND PAYMENT METHODS

SET UP FOR INVOICING, SERVICES, PRODUCTS INCLUDING GST IF APPLICABLE, PAYMENT TERMS AND NON ATTENDENCE FEES. AUTOMATION FOR LATE CANCELATIONS AND NO SHOWS.

PAYMENT METHODS SET UP, STRIPE, MEDICARE AND TYRO AND LINK TO ZANDA

THE SPECIFICS

Pricing - New Users

$1000 EX GST

Timing

6 WEEK PROJECT TIME LINE (APPROXIMATELY 30 HOURS OF WORK) THIS INCLUDES 2 WEEK PERIOD FOR QUESTIONS POST SET UP.

Pricing - Existing Users

$1300 EX GST

Timing

TO BE PROVIDED AFTER INTRO SESSION

zanda
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CERTIFICATE

⭐⭐⭐ OF COMPLETION ⭐⭐⭐

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Elisa Southon

Southon Business Solutions

HAS SUCCESSFULLY COMPLETED

Getting Started With Zanda: The Basics

80%	690147a67c63ce7bc7021aec	29 Oct 2025
SCORE	CERTIFICATE ID	DATE

https://mycourse.app/GyjGpiOxdOcdcvDyk

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Manage Client Billing in Zanda

100%	6902a23e90e1740e130e4825	30 Oct 2025
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Mastering Billing and Financial Reports

100%	69097f6de71ee906b803e123	04 Nov 2025
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https://mycourse.app/F7ZzQudSkT8cZxyZy