

GSM - GARMENTS SHOP MANAGER

WHOLESALE EDITION

User Manual Wholesale Edition

For garment wholesalers:
GST and Non-GST billing, sets, challans,
quotations and e-invoice - every module explained

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About this manual

This manual is for the **owner and staff of a garment wholesale business** using **GSM - Garments Shop Manager, Wholesale Edition**. It walks you through setting the software up step by step and explains what every screen does and how it works, including GST and Non-GST invoices, sets, challans, quotations and e-invoice files.

NOTE Your menu shows **only the sections your login is allowed to open**. A cashier will not see Reports or Settings. If you cannot find a screen described here, ask the shop owner to check your permissions.

What you need

- A Windows PC with the **Wholesale Edition** of the app installed (your software provider gives you the installer link).
- Your login: **e-mail or username** and password. Staff on a new PC also need the **shop code**.
- An internet connection while working. The app keeps working briefly if the internet drops (Chapter 15).
- A printer: an A4 printer for invoices, plus an A4 sticker sheet or thermal label printer for barcodes. A thermal printer is optional for small receipt slips.
- Optional: a barcode scanner (it works like a keyboard: it types the number and presses Enter).

How this manual is arranged

Chapter	You will learn
Getting Started	Install, sign in, the screen layout
First-Time Setup	The one-time settings every shop must do
Purchase Entry and Inventory	Putting stock into the software
Barcode Printing	Printing price labels
Billing / POS	Making bills, discounts, credit, returns
Sales History	Viewing, editing and cancelling bills
Challans and Quotations	Delivery challans and quotations
Customers and Suppliers	Ledgers, payments, deleted lists, exports
Staff	Attendance, salary, commission, staff purchases
Reports, GST and Reminders	Business numbers and money to collect
E-Invoice and E-way Bill	Creating the portal files
Logins and Permissions	Giving each person the right access
Settings Reference	Every setting explained
Subscription, Devices, Updates, Backup	Keeping the system healthy
Working Offline and Syncing	What happens without internet
Troubleshooting	Common problems and fixes

CHAPTER 1

Getting Started

Installing the app

1. Download the **Wholesale** installer from the link your software provider sent.
2. Double-click the downloaded file. If Windows shows "**Windows protected your PC**", click **More info**, then **Run anyway**. This appears for new programs that are not yet widely downloaded.
3. Follow the installer. You may choose the install folder. It adds a **desktop icon** and a Start menu entry.
4. Open **GSM - Garments Shop Manager** from the desktop icon (a blue and orange icon with the letters GSM).

TIP To **update** the app later, just download the new installer and run it over the old one. Your data is not touched.

Signing in

The first screen is the sign-in screen.

1. Type your **E-mail or username** and your **password**, then press **Sign in**.
2. **Your shop was created for you by your software provider?** Type the **Shop code** they gave you in the shop code box (it appears when you type a username that is not an e-mail, or under "Staff member on a new PC? Enter the shop code"), then your username and password. You only do this once on each PC.
3. **New owner with no account?** If you see "**New here? Create a free account**", choose it. Enter shop name, your name, mobile, e-mail and a password. A **6-digit code** is e-mailed to you (valid 10 minutes, check Spam). Type the code. Your shop is created, you are signed in and your free trial starts.
4. **Staff member on a new PC?** Choose "**Staff member on a new PC? Enter the shop code**". Type the shop code (the owner finds it under Settings, Subscription), then your username and password. You only do this the first time on each PC.
5. If the sign-in screen asks for a **Server address**, type the address your software provider gave you.
6. **Do not see "Create a free account"?** Then self-service sign-up is not switched on for your software. Ask your software provider to create your shop and give you the username and password.

IMPORTANT If sign-in says your subscription has **expired** or been **suspended**, contact your software provider. If online payment is switched on you will see "**Renew subscription online**" on the sign-in screen.

The screen layout

Part	What it is
Left menu	Every section you can open. The highlighted orange button is Billing / POS . Small red numbers show low-stock items and due reminders.
Main area	The screen you chose. Each screen has a heading and, usually, a main button at the top right.
Offline banner	A bar shown when the PC cannot reach the server. You can keep working (Chapter 15).
Update banner	A blue bar "A new version is available". Click Download and install it when convenient.
Promotion boxes	Small banners your software provider may show on some screens. They are never on the Billing screen or on printed bills.
Log out	Bottom of the menu. Use it so another person can sign in on the same PC.

Menu sections at a glance

Section	Use it to...
Dashboard	See today's sales, dues and low stock at a glance
Purchase Entry	Record goods bought from a supplier and add them to stock
Inventory	See and edit all products and their stock
Barcode Print	Print price and barcode labels
Billing / POS	Make a bill for a customer
Sales History	Find, view, edit or cancel past bills
Challans and Quotes	Make delivery challans and quotations
E-Invoice and E-way	Create files for the GST e-invoice and e-way bill portals
Suppliers	Supplier list and what you owe each
Customers	Customer list, what each owes, contacts export
Staff	Attendance, salary and staff ledger (owner only)
Reports	Profit, top products, dues and comparisons
GST Filing	Work out the GST you owe and download GSTR-1 data
Reminders	WhatsApp reminders for customers who owe money
Settings	Store details, receipt, backup, password (owner only)
Logins and Permissions	Create staff logins (owner only)

CHAPTER 2

First-Time Setup

The **owner** does these once. Open **Settings** from the menu (if a Settings password has been set you will be asked for it). Each block below has its own Save button: **save each block before moving on**.

Step 1: Store Details

1. Type **Store Name, Address, Phone**.
2. Type your **GSTIN** carefully. **A GST invoice will not save without a valid GSTIN**, and your state is read from it automatically.
3. Type your **UPI ID** (for example yourshop@upi) to show a payment QR code on receipts.
4. Choose a **Logo** picture if you want one printed on receipts (**Remove Logo** to take it off).
5. Edit the **Return Policy** and **Thank You Message** printed on bills.
6. Set the **Low Stock Alert Threshold** (default 10). Items at or below this show on the Dashboard.
7. Tick **Allow selling items with 0 stock** only if you sometimes bill before entering purchases.
8. Press **Save Settings**.

Step 2: Wholesale settings (GST, numbering and prices)

A wholesale **Settings** page has extra cards at the top. Fill in **Wholesale - Bill Numbering**:

Field	What it means
Default bill type for new bills	GST Invoice or Non-GST Bill . Every new bill starts as this type; you can change it on the bill.
Your business state	Decides CGST+SGST (same state) or IGST (other state). Fills itself from your GSTIN if the GSTIN is valid; otherwise choose it here.
Prices I enter are	Excluding GST (GST added on top) or Including GST (GST already inside the price). Choose how your prices are normally quoted.
Auto GST rate for apparel	Price limit per piece, the rate up to that price and the rate above. This is the current apparel rule; your CA should confirm it, and you can change it if the rule changes.
E-way bill needed above	The Billing screen warns you when a bill is above this value (default Rs 50,000).
B2C large limit, other-state	Used only to sort sales in the GSTR-1 export (default Rs 1,00,000).

Field	What it means
Series, Prefix, Next number	Each document series (GST invoice, GST credit note, Non-GST bill, Non-GST return, challan, quotation) has a 1 to 4 letter prefix and a next number. Numbers restart every financial year (April to March) and never repeat, for example INV/26-27/0001. If you are moving from other software, set Next number to carry on from your last bill.

Press **Save Numbering Settings**.

NOTE While you are online, the **server** gives every bill its number so two PCs never clash. The Next number boxes mainly matter for the very first bill and for offline use.

Then complete the other wholesale cards (details are in Chapter 13, Settings Reference): **A4 Invoice** (bank details, terms, default template), **Category Discounts**, **E-invoice and E-way bill details**, and **Quick-add items**.

Step 3: Receipt slip, rounding and columns

Further down the same page are the receipt settings used for the small receipt slip: **Receipt Printer Type** (Slip or Thermal, with sizes), **Receipt Content** and **Receipt Item Columns**. Tick **Category** to print category headings above items on receipts **and** invoices. Items with no category print under the heading you type (default **Net**).

Step 4: Bill rounding

Round Off Total and Per-Piece Price To: *No rounding, Nearest Rs 5, or Nearest Rs 10*. It rounds the final payable total (shown as a Round Off line) for easy cash handling. Press **Save Rounding**.

Step 5: WhatsApp number

Type your WhatsApp number with country code (for example 91XXXXXXXXXX) and press **Save**. Bills and reminders open **pre-filled in WhatsApp** and you press Send yourself. The app does not send messages on its own.

Step 6: Settings password

1. In **Settings Password** type a **New Password** and the same again under **Confirm New Password**. Press **Save Password**.
2. This password now protects Settings, GST Filing and "Erase All Data", and is needed to delete a customer or supplier.
3. **Remember it.** There is no "forgot password" button; if you lose it, your software provider can look it up for you after confirming it is really you.

Step 7: Automatic daily backup

1. In **Automatic Daily Backup** press **Change folder** and choose a folder inside **Google Drive** (install "Google Drive for desktop" first). That also keeps the copy safe online.
2. Press **Back up now** once to test, then **Open folder** to see the file.
3. Leave it on. A copy is saved every day and when you close the app. **Turn off** stops it.

Step 8: Import your existing products (optional)

If you already have a product list in Excel:

1. Press **Download Sample CSV Template** and open it.
2. Fill your products in the same columns: name, category, code, note, purchasePrice, marginPercent, sellingPrice, tax, stock, barcode. Leave sellingPrice blank to calculate it from the margin.
3. Save as CSV. Under **Upload CSV File** choose it. A result message shows how many were added.

Step 9: Staff logins and appearance

Create a login for each person in **Logins and Permissions** (Chapter 12). Under **Appearance** at the top of Settings you may pick a colour theme; it changes only that PC and never the printed bills.

KEEP THIS First-time setup checklist. Store details and GSTIN saved; printer type and size saved; receipt content and columns saved; rounding saved; Settings password set and remembered; backup folder chosen; staff logins created; products imported or entered.

CHAPTER 3

Purchase Entry and Inventory

Stock enters the software through **Purchase Entry**. Every purchase also updates the supplier's ledger, so you always know how much you owe.

Before the first purchase: add the supplier

In Purchase Entry press **+ New** beside the Supplier box (or open **Suppliers**, then **+ Add Supplier**). Type the supplier's name and details and save.

Recording a purchase, step by step

1. **1. Purchase Details.** Pick the **Supplier** (required), the **Purchase Date** and the supplier's **Invoice / Ref No.**
2. **2. Add Items.** There are two ways:
 - **Restock Existing Product:** choose the product, type **Quantity** and **Purchase Price** per unit, press **+ Add to Purchase List**.
 - **Add New Product:** fill the row left to right: **Product Name**, Category, Code, Note, **Qty**, **CP** (cost price), **Margin %**, **Selling** price and Barcode. Press **Enter** on the last box (or **Add**): the line is added below and the row stays filled for the next line, with the cursor back on Product Name.
 - The **Round** buttons (Rs 10, Rs 5, None) round the selling price up. Enter CP and Margin % and the **Selling price fills in by itself**; you can still type your own selling price.

TIP For products sold in fixed packs, set **Sold in sets of** on the product (see below). Purchase Entry then shows a small **sets** box beside Quantity: type the number of sets and the pieces fill in for you.

1. **3. Items in this Purchase.** Check the list. Then fill in the bill box:

Field	What to enter
GST Charged by Supplier (%)	The GST rate on the supplier's bill. Leave blank for a Non-GST or local bill.
Cash Discount % or Amount	A scheme or offer discount from the supplier (type either one)
Items Subtotal, Cash Discount, Bill Total	Worked out for you
Amount Paid Now	What you paid today. Leave 0 if everything is on credit
Payment Method	Cash, UPI, Card, Bank Transfer or Other
Balance Due	Worked out: this is added to what you owe the supplier

1. Press **Save Purchase**. All items are added to inventory and the purchase is logged in the supplier's ledger.

A **Purchase Saved** window appears with a **Print Barcodes** button so you can print labels for what you just bought. The **Recent Purchases** list at the bottom shows Date, Supplier, Ref, Type, Items, Total, Paid, Balance and Status; open one to see the **Purchase Bill**.

IMPORTANT Check the **quantity and prices** before saving. Stock and the supplier balance both change at once. If a purchase was entered wrongly, tell the owner: correct the supplier balance with a ledger correction (Chapter 8) and fix the product in Inventory.

Inventory

Inventory lists every product with Product, Category, Code, Note, Barcode, CP, Selling price, Margin, Tax % and Stock. Use the search box at the top (name, barcode or category). A red number on the menu shows how many items are low.

- **Edit** changes name, category, prices, tax, stock, barcode and **Sold in sets of**.
- **Delete** removes a product.
- **+ New Item** (on the Billing screen) lets you create a product while billing.

Sets and packs (Wholesale)

If a product is sold in fixed packs (a set of 3, 6, 9, 12), open it in Inventory and set **Sold in sets of** to the pack size. Stock, price and GST all stay **per piece**; only the default quantity changes:

- Clicking the product or scanning its barcode in Billing adds **one full pack** at once at the normal per-piece price. Scanning again adds another pack. You can still edit the quantity by hand.
- In Purchase Entry use the **sets** box to fill pieces.
- In Barcode Print the default is **one label per set** (stock divided by pack size), and the label can show "Set of 6 pcs".

Inventory tabs (Wholesale)

Tab	What it shows
Products	The normal product list
Stock by purchase type	A report built from your purchase records, split into GST purchases and Non-GST purchases. It is a report, not a second stock pool: "In stock now" is the combined stock. Has a CSV export.
Quick-add sold	For each category: pieces sold, number of bills, sale value (before GST) and estimated profit of items sold with Quick add (Chapter 5). Has date range, All time and a CSV of every line. It does not change any stock number.

CHAPTER 4

Barcode Printing

Barcode Print prints price labels with a barcode. A scanner reads the barcode at billing.

One-time label setup

1. Open **Barcode Print**. Under **Label Printer Type** choose **A4 Sticker Sheet** (a grid of labels on a page) or **Thermal Label Printer** (single labels on a roll).
2. **A4 sheet**: choose the **Sheet Template** that matches your stickers (65 labels 5x13, 40 labels 4x10, 24 labels 3x8, 12 labels 3x4, or Custom with columns, rows, label size, gaps and margins).
3. **Thermal**: choose a size from **Common Sizes**. They are grouped as **1 label across, 2 labels across** (2-up rolls, for example 50 x 25 mm two side by side) and **3 labels across**, and include square sizes (25, 30, 40, 50 mm). Pick **Custom** to type any width and height.
4. Thermal only: set **Labels Across the Roll** (1 to 4), the **Gap Between Labels Across** (the space between the left and right label on the roll) and an optional **Side Margin**. The page shows **Printer paper width x height**: set that same size in the printer driver (the whole roll width), or choose Continuous / Roll.
5. Press **Save Calibration**.
6. Thermal: press **Print Test Row** to print outlined test labels and see where each label lands on the real roll; adjust Side Margin and the barcode nudge until they sit inside. Sheet: press **Print Test Grid** on plain paper. On a sheet, hold it against a real sticker sheet in front of a light. If it is off, adjust **Top Margin** and **Left Margin** by that many millimetres and test again.

IMPORTANT If labels print outside the sticker area even after calibration, check the **printer's own print dialog**: Scale must be **100% / Actual Size**, never "Fit to page".

Label style

Under **Label Style** choose the barcode type (**CODE128** is recommended and the most compact), font, bar thickness and height, alignment, quiet-zone margin, whether to show the number below the barcode, and font sizes. If labels will not scan, press **Reset to Recommended (CODE128)**. Press **Save Label Style**.

Live Label Preview

Whenever **Calibration** or **Label Style** is open, a **Live Label Preview** box stays at the top of the page. It shows a real sticker (or, for a thermal roll, a whole printed row of 1, 2 or 3 labels) exactly as it will print, and **updates as you type**: font sizes, barcode height and width, positions, shop name, label size. Choose **Preview with** to see one of your own products instead of the sample item. Anything that is cut off in the preview will be cut off on the sticker.

Shop name on the label

In Label Style set **Print Shop Name on Label** to **Yes**, choose its **position** (top or bottom of the label) and **font size**. The name comes from Settings, Store Name.

Text going off the sticker?

- Use the preview to shrink the fonts or the **Barcode Box Height**, or raise the **Inner Margin** (Label Style) to keep text away from the edges.
- Thermal rolls only: if the whole print sits too low or too far left on the real sticker, use **Shift Printing Down** (a negative number moves it up) and **Shift Printing Right** in Calibration, then print a **Print Test Row** to check.
- If that is not enough, set **Printer Page Height** to *Label height + row gap* and make the printer driver paper size match the number shown.

Tick what prints on each label (Name, **Category**, Note, Code, Price, Price code, and so on) under **Label contents**. Tick **No. of pcs in set** to print "Set of 6 pcs" on set labels (default on).

Printing labels

1. Under **Choose Products** type in **Labels to Print** beside each product you want. (For set products the default is one label per set.) On a 2-across or 3-across roll, labels fill each row left to right and a last odd row leaves its right-hand labels blank.
2. To reuse a partly used sheet, set **Start Printing From Label #** (labels are numbered left to right, top to bottom; 1 is top-left). Earlier positions are left blank.
3. Press **Preview and Print Labels**. A **preview window** opens like a bill. Nothing prints yet.
4. Check the preview and press **Print Labels. Close** leaves without printing.

TIP Right after saving a purchase, use the **Print Barcodes** button in the Purchase Saved window to print labels for exactly those items.

CHAPTER 5

Billing / POS

Billing / POS is the main counter screen. You can serve several customers by **holding** bills, and every bill can be a sale, a return, or a credit sale.

Making a normal bill

1. **Add items.** Either scan the barcode (click the box that says "Scan or type barcode, press Enter") or search by name in "Search products by name..." and click the product. Each scan adds one piece (a full pack for set products).
2. **Change quantity, price or discount** in the Cart table (Item, Qty, Price, Disc %, Amount). Each cart line also shows its barcode number.
3. **Customer.** Type a name or phone in "Customer (Name or Phone)" and click the match. Leave it blank for **Walk-in**. For a new customer type the **New Customer Name** (and Address if you wish) and the customer is saved when you complete the sale.
4. **Cashier** and **Salesperson (for commission)**: choose who made the sale if your shop pays commission.
5. **Payment Method**: Cash, Card, UPI or Other. Type the **Amount Received** (leave it as "Auto = total" if the customer paid in full).
6. Check the totals bar: **Total Pcs**, Total MRP, Item Discounts, Extra Discount, Round Off, GST Included, **Total Payable**.
7. Press **Complete Sale and Print Receipt**.

Quick price entry for items not in the list

Wholesale bills often include goods that are not yet entered in stock. Use **Quick add**, directly under the barcode row:

1. Type the **Qty** and press Enter (the cursor jumps to Price). Leave Qty blank for 1.
2. Type the **Price** and press Enter. A bill line "**Garments**" x qty x price is added.
3. Every entry is its own line, in the order you typed it. **Lines are never merged**, even at the same price, so a person checking the bill can follow it.

Quick-add lines are **not stock items**: nothing is created in Inventory and no stock is deducted. They take the default HSN set in Settings, and the GST rate is chosen automatically from the price.

Apply category discount

Wholesalers give a discount by category (for example 3% on Ludhiana goods, 8% on Calcutta goods, 0% on Net). The category list and percentages are set in Settings, Category Discounts.

1. Quick-add a batch of items (for example 10 Ludhiana pieces). They are "waiting".
2. Choose the category in the dropdown (it shows each category with its %) and press **Apply category discount**. Every waiting entry gets that category's discount and category, and the batch closes.
3. Start the next batch (for example 20 Calcutta pieces) and apply that category. Items with no category use "No category". Normal scanned items are never touched.
4. Made a mistake? Press **Undo** to restore the last Apply.

NOTE If entries are still waiting when you complete the bill, the app asks before billing them with no discount.

Bill type: GST Invoice or Non-GST Bill

Pick the bill type under the bill header. **GST Invoice** opens the extra GST columns and number series; **Non-GST Bill** keeps a separate series and a plainly different layout, so the two never get mixed. GST and Non-GST records are kept separate in reports.

- A GST invoice needs your own **GSTIN** in Settings (the bill will not save without it).
- For a GST customer add **GSTIN and state** so the bill knows CGST+SGST or IGST. For a new customer on a GST bill the billing screen shows **City** and **Pincode** boxes (only the missing ones for an existing customer). The pincode must be 6 digits.
- If your GST scheme is **Composite**, GST-type bills are issued as a **Bill of Supply** with no GST charged.

Transport and dispatch

Under the bill type fill **transporter, vehicle, LR/GR number, bales and e-way bill number** (also Transporter GSTIN and distance for e-way files). They print on the invoice and can be edited later from the invoice window (**Transport** button). A reminder appears when the bill is above the e-way bill limit set in Settings.

Holding bills and serving another customer

The tabs at the top (**Bill 1, Bill 2...**) are separate bills. Press **+ New Bill** to start another while the first waits. Click a tab to switch back; the number in brackets is how many items it holds. The **x** on a tab closes (discards) that bill after asking. **Clear This Bill** empties the current one.

Discounts

What	How it works
Item discount	Type a percentage in the Disc % box of a cart line.
Extra Bill Discount (%)	A discount on the whole bill. Press Split into items to spread it equally in rupees across every item and update each Disc % to match.
Settle to this	The customer paid less than the total? Type what was received and press Settle to this . The app works out the discount needed and splits it equally in rupees across the items.
Round Off	Set in Settings (nearest Rs 5 or Rs 10). Shown as a separate line.

TIP Category discounts set in Settings fill in automatically when you add an item of that category. You can still change the discount on the bill.

Credit, part payment and full credit

- **Part payment:** type a smaller **Amount Received**. The balance goes to the **customer's ledger** (a customer must be selected).
- **Full credit:** tick the **Full credit** box: the customer pays nothing now and the whole bill goes to their ledger.

Returns and exchanges

1. Add the returned item and set its quantity to a **negative number** (for example -1). The line is tagged **Return** and its amount is subtracted from the bill.
2. You can mix returns and new items on one bill (an exchange). If the bill total becomes negative, the shop owes the customer money and a box asks how to settle it: **Pay Cash/UPI Refund Now**, or **Credit to Customer Ledger** (no cash paid; needs a customer).
3. Complete the bill as usual. The returned stock goes back into inventory.

NOTE For a **GST credit note** use the **Credit Note** button in the invoice window (see "After the sale" below). A GST credit note must say which invoice it is against, and the lines come back reversed.

Staff buying for themselves

Choose the staff member in **Staff purchase (staff buying for himself)**. The bill is not treated as a normal customer sale; if he pays nothing now the amount goes to his **staff ledger** (Chapter 9) instead of creating a new customer, and is taken off his salary due.

After the sale

The **invoice window** opens (or the small receipt slip, as set in Settings). In the invoice window:

- Choose a **template**: **Simple**, **Detailed**, **Compact** or **Copy Labels**.
- Tick the copies you want: **Original for Recipient**, **Duplicate for Transporter**, **Triplicate for Supplier**, **Office copy**.
- **Print / Save as PDF** opens the normal print dialog; choose "Save as PDF" there to make a PDF to send by WhatsApp or e-mail.
- **Receipt Slip** shows the small thermal-style receipt instead. **Transport** edits dispatch details. **Credit Note** starts a credit note against this invoice.

Totals show **Total Qty (pcs)** under the Qty column on every template. Categories print as headings in the order items were entered; bills with quick-add items always print the headings.

TIP Barcode scanner tip: click the barcode box once, then scan. After each scan the item appears in the cart and the cursor stays ready for the next scan.

CHAPTER 6

Sales History

Sales History lists bills for a date range (choose **from** and **to** dates, then **View Past Sales**). Columns: bill number, date, time, customer, **Pcs**, total, payment. Day-wise totals are shown.

Button	What it does
View	Opens the bill or invoice so you can reprint or send it.
Edit	Opens the bill in the Billing screen (tab "Editing ...") to add or remove items or change amounts. Stock and the customer's account are corrected when you save.
Cancel	Use when the customer refuses the bill or it was made by mistake. Items go back to stock and the bill is removed from sales, reports and the customer's account.
Cancelled Bills	The list of cancelled bills, each with your reason. A cancelled bill is never erased .

NOTE A bill **cannot be edited** if it is a return, a GST invoice or credit note (these are tax documents), or was made from a challan. Cancel it and make a new one instead.

IMPORTANT A GST invoice that already has an **IRN** (from the e-invoice portal) is guarded against cancelling. Cancel it on the portal first, as the law requires.

CHAPTER 7

Challans and Quotations

Use **Challans and Quotes** (menu, below Sales History) for goods sent before billing, and for price offers.

	Delivery challan	Quotation
Takes goods off stock?	Yes	No
Is it a sale?	No. It is converted into a bill later	No. An offer only
Number series	Challan series (own prefix)	Quotation series (own prefix)

Making one

1. Go to **Billing / POS**. Pick the customer and add items as for a bill.
2. Instead of completing the sale, use "**Or save this cart as**" and choose **Delivery challan** or **Quotation**.
3. The document gets its number from the server (with your own prefix) and opens for printing.

Working with them

- Open **Challans and Quotes** to see the list. **View / print** any of them.
- **Turn into a bill:** goods on a challan are **not deducted twice** from stock when it becomes a bill. Challans and quotations can include quick-add lines.
- **Cancel** a challan to put its goods back into stock automatically.

CHAPTER 8

Customers and Suppliers

Customers

Customers is sorted by **total spend**, so your most loyal customers are first (good for special offers). Click a column heading to sort by that column.

1. Press **+ Add Customer** to add one (name, phone, address, GSTIN, state, city and pincode for GST customers).
2. Press **Edit** to change details, or **Ledger** to open the customer's account.

Customer ledger

The ledger shows every bill and payment with a running balance. From it you can: record a **payment received** (date, amount, method, note); add a **charge / correction** (for transport, GST added later, or fixing a mistake); and set an **Opening Balance** for what the customer already owed before you used the software. Press **Print Ledger** to print a statement. Changing an opening balance asks for confirmation because it changes the whole balance.

Click **View Bill** on a ledger row to see the bill; closing it brings you **back to the same ledger**.

Deleting a customer by mistake and restoring

- **Delete** asks for the **Settings password** (if one is set). A wrong password or Cancel deletes nothing.
- Press **Deleted Customers** to see them (name, phone, when, by whom, how many bills). **Restore** puts the customer back exactly as before; old bills, dues and payments link to them again. Restoring needs no password.

Export Contacts

Press **Export Contacts**. Optionally type a **prefix** and **suffix** to add to every name (for example "Shop-"). Choose **CSV** (for Excel) or **vCard (.vcf)** to load them into your phone's contacts, for WhatsApp offers.

Suppliers

Suppliers works the same way: **+ Add Supplier**, **Edit**, **Ledger**, **Deleted Suppliers** with **Restore**. A supplier can only be deleted if there are **no purchases** from him.

Supplier ledger

- **Opening Balance**: what you already owed before using the software.
- **Record Payment**: date, amount, method (Cash, UPI, Card, Bank Transfer, Other) and note. Lowers what you owe.

- **Add Charge / Correction:** "Add Charge" increases what you owe (transport, GST added later); "Correction / Credit" reduces it (fixing a mistake). Not tied to a specific bill.
- **Ledger History** lists Date, Description, Debit (Owed), Credit (Paid) and Balance. **View Bill** opens a purchase bill. **Print Ledger** prints a statement.

NOTE The Dashboard also shows **Paid to Suppliers** for a chosen date, with details by supplier and payment method.

CHAPTER 9

Staff

NOTE **Staff** (attendance and salary) is **owner only**. Staff logins cannot open it.

Adding staff

Press **+** **Add Staff**: Name, Phone, Role, **Monthly Salary**, **Commission** (a percentage of sales, a fixed amount per piece, or a fixed amount per bill), overtime pay settings, and Join Date. This is a list of people *for attendance and pay*; it is separate from sign-in logins.

Daily attendance

1. Open **Staff**, pick the **Date**.
2. For each person choose **Present**, **Half Day**, **Paid Leave** or **Absent**, and type any **Overtime (hrs)**. Or press **Mark All Present** and change the exceptions.

The staff list shows the month's count of P / H / A / L, commission this month, and **Balance Due** for each person.

Staff ledger and salary

Press **Ledger** beside a person:

- **Generate Monthly Salary**: pick a month and press **Calculate and Add to Ledger**. Pay is worked out from attendance (**Present = full day**, **Half Day = 50%**, **Paid Leave = full day**, **Absent = unpaid**) plus overtime and the **commission earned from that month's sales**, and added as an amount due.
- **Record Payment**: type Salary Payment, Advance or Other, with date, amount and note.
- **Add Charge / Correction**: add a bonus or reimbursement ("I owe him more") or deduct for damage or goods taken ("I owe him less").
- **Opening Balance** for what was owed before using the software.
- Products a staff member buys from the shop appear in his ledger automatically when you choose him as buyer in Billing.

TIP To give commission, always choose the **Salesperson** on the bill. Commission is calculated from those bills when you generate the month's salary.

CHAPTER 10

Reports, GST and Reminders

Reports

Choose a date range or press **All Time**. Reports shows:

- Totals and **estimated profit** (selling price minus cost price of items sold).
- **Sales Comparison**: this week vs last week, this month vs last month.
- **Top Selling Products, Top Customers, Revenue by Category, Payment Methods.**
- **Low Stock, Supplier Dues and Customer Dues.**

NOTE Three buttons at the top: **All, GST only, Non-GST only**. They filter every figure, including the week and month comparisons. Low stock and supplier dues are not split. **Quick-add** items have no cost price, so their profit is **estimated** using the rule you chose in Settings (Quick-add items); a line under the stat cards says what was included.

GST Filing

GST Filing is protected by your Settings password. It works out what you owe from the sales and purchases already recorded.

Choose your scheme under **Your GST Scheme** (**Composite**: 1% of sales quarterly, CMP-08; or **Regular**: monthly). For the Regular scheme the page shows output tax, input tax credit and the **net payable by CGST, SGST and IGST**.

GSTR-1 data for your CA

On the GST Filing page (Regular scheme) pick the month and press **Download GSTR-1 (Excel)**. Send the file to your CA. Large other-state B2C sales are sorted using the limit in Settings.

IMPORTANT This is a **simplified calculator** built from what is recorded in the software. It does not handle reverse charge, exports or special cases, and it does not replace your CA's advice. Always let your CA check before you file.

Reminders

Reminders lists customers who owe money, biggest balance first, with their phone, balance, when you last reminded them and a status: **Due** (never reminded, or the last reminder was 7 or more days ago) or **Recently Sent**. By default only customers who are **Due** are shown, so the list is your to-do for the week. Tick **Show all customers with dues** to see everybody who owes money. The red number on the menu shows how many reminders are due.

1. Press **Send via WhatsApp** beside a customer. WhatsApp opens with the payment message already typed.
2. Check it and press **Send** in WhatsApp. The app records today as the Last Reminder, and the customer shows as Recently Sent for the next 7 days.

NOTE The app does not send messages by itself. You always press Send in WhatsApp.

CHAPTER 11

E-Invoice and E-way Bill

Businesses above the GST turnover limit must create an **e-invoice** (IRN and QR code) for B2B invoices and an **e-way bill** for goods movement above the limit. This app **prepares the files; you upload them on the government portals yourself**. The app never connects to the portals.

Set it up once (Settings)

1. In **Store Details** make sure your GSTIN is correct.
2. In **Wholesale - E-invoice and E-way bill details** fill your legal name, address, pincode, place and unit code as the portal expects.
3. For every GST customer add **GSTIN, state, city and pincode** (Customers, Edit, or the City and Pincode boxes on the bill).
4. On bills, fill the transport fields (Transporter GSTIN and Distance are needed for the e-way bill).

Creating the files

1. Make your GST invoices as usual.
2. Open **E-Invoice and E-way** from the menu. Each invoice shows a **readiness check**: what is missing (for example pincode or HSN).
3. Fix anything marked, then tick the invoices and press **Download e-invoice JSON** (files are split into groups of 100) and/or **Download e-way bill JSON**.
4. Upload the file on the e-invoice portal (bulk generation) or the e-way bill portal.
5. Bring the result back: **paste the signed QR, enter the IRN**, or use **Import portal response**, and enter the **e-way bill number**. The IRN, QR and e-way number are then **printed on the invoice**.

IMPORTANT The first time, test with **one invoice** on the portal's sandbox or bulk upload. The portal tells you the exact field it rejects. Common first rejections: pincode not matching the state, buyer legal name, HSN length. Tell your software provider if the "Import portal response" button cannot read a response file.

NOTE An invoice that already has an IRN cannot be cancelled in the software until you cancel it on the portal.

CHAPTER 12

Logins and Permissions

Only the **owner** sees **Logins and Permissions**. Give each person their own login and let them open only what they need.

Adding a login

1. Open **Logins and Permissions** and press **+ Add Login**.
2. Type a **username** and **password**.
3. Choose a **role** (see the table). For Custom, tick the sections.
4. Save. Tell the person their username, password and the **shop code** (from Settings, Subscription).

Role	Can open
Cashier	Billing / POS and Customers
Manager	Everything except Reports and GST Filing (Dashboard, Billing, Sales History, Customers, Purchase Entry, Inventory, Barcode Print, Suppliers, Challans and Quotes, Reminders)
Admin	All sections except Settings and Staff / payroll
Custom	Exactly the sections you tick
Owner	Everything including Settings, Staff and this screen

Changing and removing access

- **Edit access** changes role or sections. **Reset password** sets a new password. **Show password** lets the owner read it. **Turn off** deactivates a login: it takes effect at once, even if the person is signed in.
- Settings, Staff (payroll) and Logins and Permissions are **owner-only** and cannot be given to others.
- When a person leaves, turn off their login the same day.

CHAPTER 13

Settings Reference

Settings (owner only, and protected by the Settings password if set). This is every card on the page.

Card	What it controls
Appearance	Colour theme on this PC only
Wholesale - Bill Numbering	Default bill type, state, price mode, auto GST rate, e-way limit, series prefixes and next numbers
Wholesale - A4 Invoice	Bank details, terms, declaration, default template, open invoice or slip after a sale, Save and Preview Sample
Wholesale - Category Discounts	A discount percentage for each category
Wholesale - E-invoice and E-way bill details	Seller details the portals need
Wholesale - Quick-add items	How profit on quick-add lines is estimated; HSN for quick-entered items
Store Details	Name, address, phone, GSTIN, UPI ID, logo, return policy, thank-you, low-stock threshold, allow selling at 0 stock
Receipt Printer Type	Slip (fixed size) or thermal roll, with sizes
Receipt Content	Which items print on the receipt
Receipt Item Columns	Which columns print; category headings; heading for items with no category
Bill Rounding	No rounding, Rs 5 or Rs 10
WhatsApp	Your WhatsApp number for pre-filled messages
Import Existing Products	Bring products in from a CSV
Automatic Daily Backup	Backup folder, Back up now, Open folder, on/off
Backup and Restore	Download Full Backup; Restore from Backup File
Settings Password	Protects Settings, GST Filing, Erase All Data and customer/supplier delete
Danger Zone	Erase All Data: asks you to type DELETE and the Settings password. Never use it casually.
Subscription	Plan, expiry, shop code, Renew or Buy, Devices (owner only)

Wholesale cards explained

A4 Invoice

Enter your **bank details**, **terms** and **declaration** (printed on every invoice), pick the **default template**, and choose whether the **invoice** or the small **slip** opens after a sale. Press **Save and Preview Sample** to see a sample invoice in every template without making a bill.

Category Discounts

Press **+ Add category**, pick a category you created in Purchase or Inventory and type its discount %. When you add an item of that category to a bill, its discount is filled in automatically, and you can still change it on the bill. Press **Save Category Discounts**. Categories appear here once you have products with a category.

Quick-add items

Quick-add lines have no cost price. Choose how Reports estimates profit on them: **Do not count** (default), **% profit margin on sale value** (before GST), or **Fixed Rs profit per piece**. Set the **HSN for quick-entered items** here; a registered buyer's bill needs an HSN on every line. The rule is applied when a report opens, so changing it restates earlier periods too.

E-invoice and E-way bill details

The seller details and unit code the portals need (see Chapter 11).

CHAPTER 14

Subscription, Devices, Updates, Backup

Subscription and devices (Settings, Subscription)

- Shows your plan status (trial / active), the **expiry date** and the **shop code**.
- **Devices** lists every PC signed in to your shop. Use **Rename** to give a PC a clear name ("Counter 1"), and **Revoke** to sign a PC out at once and free its slot (for example a lost or replaced PC). Your plan allows a maximum number of devices.
- **Renew or Buy** shows how to contact your software provider (WhatsApp, phone, e-mail). If online payment is switched on, press **Renew / Subscribe online**: pick the monthly or yearly plan for your edition, type an **offer code** if you have one and press Apply, then pay on the secure payment page that opens in your browser. The window waits and changes to "Payment received, active until ..." by itself.

NOTE Card details are entered only on the payment company's own page, never inside this app.

Updates

A blue banner "A new version is available" means a new installer is ready. Click **Download**, run the installer, and the app updates. Your data is not affected. If a full-screen "**An update is required**" message appears, install the update to continue; nothing else works until you do.

Backups: how your data is kept safe

Layer	What it is
Cloud storage	Your data lives on your provider's server, with a copy on each PC.
Automatic Daily Backup	A copy on this PC (best inside Google Drive) every day and when you close the app.
Download Full Backup	One file containing everything: products, customers, suppliers, sales, purchases, challans and quotations, payments, staff, attendance, salary records, settings and bill numbers. Make one before big changes and keep it somewhere safe.
Your provider's backups	Your software provider also keeps backups of the whole system.

Restoring

IMPORTANT **Restore from Backup File** replaces what is in the software with the file's contents. Ask your software provider before using it, and make a fresh Download Full Backup first.

CHAPTER 15

Working Offline and Syncing

Several PCs, one shop

Every PC asks the server for changes about **every 20 seconds**. When something new arrives from another PC (a new product, a sale, a purchase, a challan) a small message appears and the screen updates.

Bill numbers and stock are controlled by the server. Two counters cannot get the same bill number, and the last piece cannot be sold twice.

If the internet drops

- A persistent **offline banner** appears.
- You can keep working from the PC's local copy. Changes are saved on this PC and **retrieved automatically** (every minute, and as soon as the connection is back).
- **Subscription and device checks happen online.** If your plan expires or a PC is revoked, the app signs out as soon as it can reach the server.

IMPORTANT Try to stay **online while billing**, especially with more than one PC. Two PCs billing offline at the same time could in theory be given the same bill number.

NOTE If two PCs change the **same field of the same record** while offline, the last one to reconnect wins. Settings are saved as a whole. Avoid editing Settings from two PCs at once.

CHAPTER 16

Troubleshooting

Problem	What to do
I cannot sign in	Check e-mail/username and password (capital letters count). Staff on a new PC need the shop code. If it says expired or suspended, contact your provider.
"Device limit reached"	Ask the owner to Revoke an old PC in Settings, Subscription, Devices.
Offline banner shows	Check your internet. Keep working; the app retries by itself.
A product does not show on the second PC	Wait about 20 seconds. If the offline banner is on, the PC is not connected.
Barcode scan does nothing	Click the barcode box first. A product must exist with that barcode; otherwise "No product with that barcode" appears.
Cannot sell: not enough stock	Enter the purchase first, or ask the owner to tick "Allow selling items with 0 stock" in Settings.
Labels print outside the stickers	Printer dialog Scale must be 100%. Re-calibrate with Print Test Grid and adjust Top/Left Margin.
Barcode will not scan	In Label Style press Reset to Recommended (CODE128), make the bars taller, and leave the quiet-zone margin.
Receipt prints the wrong size	Settings, Receipt Printer Type: set the correct size and press Save Receipt Size.
I forgot the Settings password	Contact your software provider. They can look it up after confirming you are the owner.
A customer or supplier was deleted by mistake	Open Deleted Customers / Deleted Suppliers and press Restore.
A bill was made by mistake	Sales History, Cancel (enter a reason). Items return to stock.
"Update required" screen	Install the newest version from the link your provider gives you.
Cannot open Settings or Staff	They are owner-only. Sign in as the owner.
GST invoice will not save	Check your own GSTIN in Settings, and the customer's GSTIN and state.
Wrong CGST/SGST or IGST	Your business state (from your GSTIN) or the customer's state is wrong.
Cannot edit a GST invoice	GST invoices are tax documents. Cancel and re-issue, or use a Credit Note.
E-invoice file rejected by the portal	Read the error code on the portal: it names the field. Usual causes: pincode vs state, buyer legal name, HSN length. Fix the customer or settings and download again.

TIP When you ask your software provider for help, tell them: your shop name, what you clicked, the exact message on screen, and the app version (shown on the update banner or sign-in screen).

CHAPTER A

Glossary and Quick Reference

Term	Meaning
CP	Cost price: what you paid per piece
Margin %	Profit added to cost to get the selling price
Ledger	The running account of one customer, supplier or staff member
Opening balance	What was owed before you started using the software
Shop code	8-letter/digit code staff use to sign in on a new PC
Device	One PC signed in to your shop
Walk-in	A customer not saved in the customer list
Hold bill	Starting another bill tab while the first waits
GST Invoice	A tax invoice with GST columns and its own number series
Non-GST Bill	A bill with no GST, kept in a separate number series
Bill of Supply	The document used instead of a tax invoice under the Composite scheme
Credit note	A document reducing an earlier GST invoice (returns, corrections)
Challan	A delivery note for goods sent before billing; takes stock off
Quotation	A price offer; no stock effect
HSN	Product classification code printed on GST invoices
IRN / QR	Invoice reference number and signed QR code issued by the e-invoice portal
E-way bill	Goods movement document required above the limit
Set / pack	A fixed group of pieces (3, 6, 9, 12) sold together
Quick add	Entering Qty and Price for goods not yet in stock

Daily routine in a nutshell

1. Open the app and sign in. Check the **Dashboard** and low stock.
2. Enter purchases (GST or Non-GST) in **Purchase Entry**; print set labels for new items.
3. Bill in **Billing / POS** choosing GST Invoice or Non-GST Bill; print invoice copies for the transporter.
4. Record customer payments and supplier payments in their **Ledgers**.
5. Month end: **GST Filing** (GSTR-1 Excel for your CA) and e-invoice files if needed.
6. Owner: **Attendance, Reminders, Reports** (All / GST only / Non-GST only).