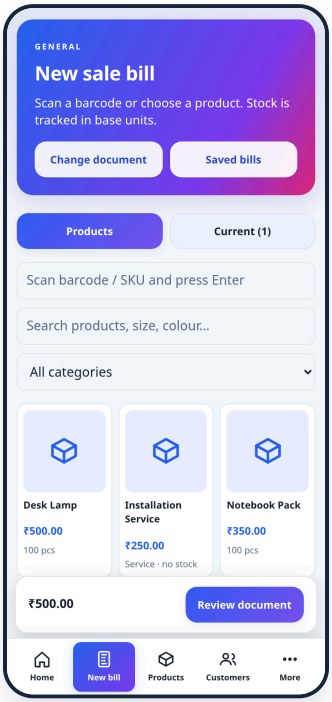
BUSINESS 09 · GET READY

General

Simple billing for mixed businesses.

Best for: Businesses selling a mixture of goods and services without a specialist workflow.



Actual app interface in an isolated browser preview. Fictional sample records; native activation and hardware are not demonstrated.

1. **Choose the preset**
   Settings → Features → Business type → General.

2. **Add goods and services**
   Use stock products for physical goods. Choose Service — no stock for work such as installation.

3. **Prepare customers and branding**
   Add customer details, business name, logo, address, tax settings and invoice format.

Your main tools
Products · New bill · Quotations · Collections · Reports

BUSINESS 09 · DAILY WORKFLOW

Follow these steps.

1. **Choose quote or direct bill**
   Use Quotations when a customer needs an agreed price first; use New bill for an immediate sale.
2. **Add goods and work**
   Choose products, service lines, quantities and agreed rates.
3. **Review the total**
   Check discounts, tax, customer details and payment terms.
4. **Record approval if quoted**
   Record the customer approval and reference, then convert the saved quotation once.
5. **Record payment**
   Enter actual cash / bank / UPI / card receipts and leave any agreed due balance.
6. **Save and check**
   Verify the invoice, product stock and customer balance; print or share the saved document.

Product plus installation
Desk lamp ₹800 + installation service ₹200 = ₹1,000 at 0% sample tax. Receive ₹600; customer due is ₹400. Lamp stock decreases by 1; the service has no stock movement.

BUSINESS 09 · STAY IN CONTROL

Useful tools. Clear checks.

Quotation history

A quotation does not move stock. Its approved conversion creates the invoice and moves goods stock once.

Purchases

Receive physical products through Purchase. Non-stock service SKUs belong on sales / quotations, not stock purchase receipts.

Returns and collections

Use the original invoice for linked returns. Allocate received money to the correct outstanding bills; unused receipts can remain advances.

Reports and backup

Review sales, stock, customer / supplier balances and expenses. Export a dated backup after the working day.

Before you finish

- ✓ Goods and non-stock services have the correct item type.
- ✓ The same quote is converted only once.
- ✓ Balances match actual receipts and linked credits.

Changing the business preset changes visible tools. It does not create a separate company or erase earlier records. Keep different businesses in properly separate data workspaces.