Shop Management Software

Complete Getting Started & Training Guide

What's inside this guide

1 First-Time Setup

Before recording your first transaction, spend 10 minutes completing this one-time setup. Everything below is found in the **Shop Settings** panel on the right side of your dashboard.

1.1 Update Your Email Address

Shop Settings panel → Email Update

Step 1: Open Email Update

From the dashboard, look at the right sidebar under **Shop Settings** and click **Email Update**.

Step 2: Enter and save your email

Enter a valid, active email address you check regularly and save it.

> ***TIP:*** *Your email is used to send you your password reset link, so keep it correct and up to date. You'll also need it, along with your registered phone number, if you ever contact support.*

1.2 Bill Settings

Shop Settings panel → Bill

Step 1: Open Bill Settings

Click **Bill** in the Shop Settings panel.

Step 2: Set up your bill/receipt details

Fill in the details you want printed on customer receipts/bills - such as your shop name, address, contact number, and any custom note or terms you want shown at the bottom of every bill.

> ***TIP:*** *Set this up first, since every bill you print afterward will automatically use these details.*

1.3 Module Settings

Shop Settings panel → Main Settings → Modules tab

Step 1: Open Main Settings

Click **Main Settings** in the Shop Settings panel. It opens on the **Modules** tab by default.

Step 2: Turn on the services you actually offer

Modules represent the different services your shop provides (for example Money Transfer, AEPS/ATM, Bill Payment, etc.). Enable only the ones relevant to your shop.

> ***TIP:*** *Only enabled modules show up in your day-to-day Quick Add and transaction screens, so this keeps your daily workflow clean and fast.*

1.4 Custom Services Settings

Shop Settings panel → Main Settings → Custom Services tab

Step 1: Go to the Custom Services tab

Inside Main Settings, click the **Custom Services** tab.

Step 2: Add a new custom service

If you offer something not already listed as a standard module (for example a specific government form, a printing service, or any local service), click **Add New Custom Service**, give it a name, pick an icon and colour, and save.

Step 3: Edit or remove anytime

Your custom services appear in a list below the form, where you can edit their name/icon or delete them whenever you like.

1.5 Visibility Settings

Shop Settings panel → Main Settings → Visibility tab

Step 1: Go to the Visibility tab

Inside Main Settings, click the **Visibility** tab.

Step 2: Choose what shows up

Tick or untick each service (including your custom ones) to control whether it appears in the transaction entry screens. Save your changes.

> ***TIP:*** *Hiding services you never use reduces clutter and mistakes when your staff are quickly entering transactions.*

1.6 Shop Profile Settings

Shop Settings panel → Shop

Step 1: Open Shop Profile Settings

Click **Shop** in the Shop Settings panel.

Step 2: Fill in your shop details

Enter/confirm your shop name and other profile details. Use the live preview on the page to check how it will appear before saving.

2 How to Record Transactions

Once setup is done, everyday transactions are recorded from the **Quick Add** bar at the top of your dashboard.

Step 1: Fill in the Quick Add row

Choose the **Service** (e.g. Money Transfer, Bill Payment), enter the **Customer Name**, **Amount**, and your **Commission**.

Step 2: Choose how the customer paid

Select **Cash**, **UPI**, or **UPI (with Bank)**. Choose UPI (with Bank) when you want to record exactly which bank account the UPI payment landed in.

Step 3: Choose the settlement account

If the transaction is paid out from a bank account or wallet rather than your cash counter, select that account so its balance is deducted correctly.

Step 4: Use Split for multi-part transactions

For transactions involving more than one payment method or more than one debit account (for example a passport application paid partly by UPI and partly in cash, and settled from both a bank account and a portal wallet), click **Split across multiple payment methods / debit accounts** below the row and fill in each part.

Step 5: Click Add

This stages the entry in the **Pending Entries** list below - it is not saved yet.

Step 6: Review and click Submit All Entries

Add as many entries as you like first, then review the Pending Entries table and click **Submit All Entries** to save everything to your records in one go.

> ***TIP:*** *Clicking "Add" only stages a transaction. Nothing is saved to your records until you click "Submit All Entries" - this is the most common point of confusion for new users.*

Other quick actions available on the same bar: **Cash Withdrawal**, **Expenses**, **Cash In**, **Daily Collection**, **Credit (Pending)**, **Quick Sale** (for inventory), and **Photo Printing**.

3 Adding Bank Accounts & Wallets

Top navigation → Banks & Software | Wallet Management

Step 1: Open the Banks & Software tab

From the top navigation bar, click **Banks & Software** to see all your linked accounts at a glance, or click **Wallet Management** for the full add/edit screen.

Step 2: Add a bank account

Click **Add Bank**, enter the bank name and opening balance, and save. This account will now appear as a choice whenever you record a transaction settled through a bank.

Step 3: Add a wallet / software portal

Similarly, add any digital wallet or portal balance you use (for example a service provider wallet like CSC Digital Seva) under the Wallets tab, with its opening balance.

Step 4: Keep balances accurate

Every transaction you record against a bank or wallet automatically updates its balance, so make sure the opening balance you enter is correct on day one.

> ***TIP:*** *Only Superusers and staff members added under a Superuser can manage banks and wallets. If you don't see this option, ask your shop's Superuser account holder.*

4 Understanding the Profit Page

Top toolbar → Profit

Step 1: Open the Profit page

Click **Profit** in the toolbar above your transactions list.

Step 2: Read your earnings breakdown

This page totals up the **commission** you've earned - the actual profit from your services - separate from the larger amounts that simply pass through your hands (like the principal amount of a money transfer).

Step 3: Filter by date or period

Use the date controls on the page to check profit for today, a specific day, or a date range, so you can track how your business is doing over time.

5 Daily Report

Toolbar → Daily Report (or Print Daily Report)

Step 1: Click Daily Report

From the toolbar above your transaction list, click **Daily Report**.

Step 2: Review the full day summary

The report lists every transaction for the day along with Opening Balance, Current (Counter) Balance, UPI Received, Total Credit given, and Total Profit - everything you need for a day-end check.

Step 3: Print or save it

Use your browser's print option to print a physical copy for your records, or save it as a PDF, complete with a signature line at the bottom.

> ***TIP:*** *Get into the habit of pulling up the Daily Report at closing time every day - it's the fastest way to catch any mismatch before it becomes a bigger problem.*

6 Checking Counter Balance

Right sidebar → Counter Balance card

Step 1: Look at the Counter Balance card

On the right sidebar of your dashboard, the green **Counter Balance** card shows exactly how much physical cash should be in your cash drawer right now, based on everything recorded so far today.

Step 2: Compare with your physical cash count

At any point in the day - and especially at closing - count the actual cash in your drawer and compare it to this figure.

Step 3: Investigate any mismatch

If the two don't match, check the day's transactions for a missed entry, a wrong payment method selected, or a Credit (Pending) sale that hasn't been marked as collected yet.

> ***TIP:*** *The Counter Balance only reflects transactions marked as Cash. Money received by UPI or settled through a bank/wallet does not add to this figure - which is exactly why it should match your physical cash drawer.*

7 Recording Daily Collection

Quick Actions bar → Daily Collection

Use Daily Collection whenever you're recording money collected in bulk - for example, cash collected earlier and now being formally logged, or collections gathered from a specific source during the day.

Step 1: Click Daily Collection

In the Quick Actions bar at the top of your dashboard, click **Daily Collection**.

Step 2: Fill in the details

Enter the amount collected and any notes describing the source, then save.

Step 3: Confirm it reflects in your balance

The amount will be added to your counter balance immediately, so double check the figure before saving.

8 Recording Customer Pending (Credit)

Quick Actions bar → Credit (Pending)

Use this whenever a customer takes a service now but pays you later - so you don't lose track of what's owed to you.

Step 1: Click Credit (Pending)

In the Quick Actions bar, click **Credit (Pending)**.

Step 2: Fill in the transaction and customer details

Enter the service, amount, and the customer's name/contact so you can follow up later.

Step 3: Save it as pending

This is recorded separately from your regular cash/UPI transactions and shown as outstanding credit until it's collected.

Step 4: Mark it collected once paid

When the customer eventually pays, go back to the pending entry and mark it as collected so it moves into your normal collections and updates your balance correctly.

> ***TIP:*** *Review your pending/credit list regularly - it's easy to forget an informal "pay me later" arrangement without a proper record.*

That's it - you're ready to run your shop end-to-end on the software. Keep this guide handy for training any new staff member.