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Client Section

How to add a new Client?

1. Open Client View
2. Click on add new client.
3. Fill all the mandatory fields and to ensure better operation fill all fields.
4. Click on the button below to add new client and confirm.
5. New client has been added.

How to change Client Details?

Please note that changing the company name and client name is not advised as the details in the old invoices will remain the same and this could create confusion or hamper search.

1. Open Client View
2. Search the client you wish edit
3. Click on the view button to view all the details
4. Change the desired details
5. Click on the save changes button and confirm.
6. Details have been changed accordingly.

Product Section

How to add a new Product?

1. Open Product View
2. Click on add new product
3. Fill all the mandatory fields and to ensure better operation fill all fields.
4. Click on the button below to add new product and confirm.
5. New product has been added.

How to change Product Details?

Please note that changing the product name and product code is not advised as the details in the old invoices will remain the same and this could create confusion or hamper search.

1. Open Product View
2. Search the product you wish edit
3. Click on the view button to view all the details
4. Change the desired details
5. Click on the save changes button and confirm.
6. Details have been changed accordingly.

Invoices

How to create an Invoice?

<u>Step 1: Select the Client</u>

1. Search for the Client to Select
2. If the Client has already been created then just select it from the dropdown
3. If the Client is new then you can create it by adding the details in the relevant fields and proceeding ahead with the other steps.
4. The client will be saved for future transactions also.

<u>Step 2: Add the Products and other details</u>

1. Select the date of invoice from the given range. Range of date starts from our last invoice saved in the system till present date.
2. Search to Select and Add the Products.
3. Once the product is added select the tax and change the price as per your requirement.
4. Add more products if you so choose, by searching the products and selecting them.
5. If the product you wish to add has not been created yet, then follow the add new product link to do the same and retrace the steps back to step 2.

Step 3: Confirm Invoice

1. Check the details and confirm Invoice.
2. Invoice has been created. Now you can take a print out or save a pdf using browser print options.

Accounts

Due Payment List

Where is the list of client's due payment?

1. Click on the accounts link on the main menu
2. The list displayed here contains the payments due in descending order.

Payment Entries

How to enter the payment received and track unpaid invoices?

1. In the Accounts Section
2. Search the client you want the enter the payment for.
3. Click on the Account History button to access the individual account of any client.
4. Click on the Add Entry Button to add the payment
5. Select the type of transaction
    a. Payment Received
    b. Payment Returned
    c. Credit Note
6. Select the relevant Invoice Number/Numbers related to the amount
7. Enter the amount to the subsequent Invoice numbers
    a. If in case the amount paid by the Client exceeds the value of the total value of all Invoices then you will see an option of credit note at the end. All you need to do is add the remaining amount under this and it will be balanced automatically.
    b. If in case a credit note was already issued and you are adding the amounts to the Invoices then you will also have to add the credit note to an outstanding amount in order to balance the account.
8. Select the mode of transaction
    a. Cash
    b. Bank
        i. Cheque
        ii. NEFT
        iii. RTGS
    c. Others
9. Add Transaction Number / Narration
10. Add Remark
11. Click on the save button and confirm.
12. The entry is added to the account and will also reflect in relevant Invoices.

Where can I find the Sales Report? / How to view sales of a specific time period?

1. Open the Invoice View from the Main Menu
2. Click on the Sales Report button placed on top right corner.
3. Select the time period you wish to generate report of and click the search button.
4. The requested report has been generated for your perusal.

Can I export the data on excel?

Yes, you can export the data for specific sections on excel by clicking on the export button on the top right corner.

How to change the password?

1. Click on the Settings Button from the Main Menu.
2. Click on the Change Password Button placed on the top right corner
3. In case you know the old password
    a. Add the old Password
    b. Add the new Password
    c. Confirm the new Password
    d. Click on the save button and confirm
4. In case you do not know the old password
    a. Click on the Forgot Password Button and an email will be sent to you with the link to reset password
    b. Change the Password
    c. Click Save and Confirm
5. Please note that you can also change the password from the login screen by clicking on the forgot password button and subsequently entering the registered email id to get the reset link.

How to add more taxes?

1. Click on the Settings Button from the Main Menu.
2. Click on the Setting Button placed on the top right corner.
3. You will find the list of available taxes at the bottom of this section.
4. Type the tax name and tax percentage in the fields provided.
5. Click on add and confirm.
6. New tax has been successfully added.
7. Please note that you can add as many taxes as you desire.

How to Change Personal Details/Profile?

1. Click on the Settings Button from the Main Menu.
2. You will see you current profile in front of you.
3. You change or alter any details you desire.
4. Click on the save changes button and confirm.
5. Please note that you can change any detail except for the Company Name as the subscription of this app is registered to a single organisation only.

6. In order to change the name of the company you must contact us at info@roaringstudios.com

How Add/Change Terms and Conditions? Note you can also add your bank details here.

1. Click on the Settings Button from the Main Menu.
2. Click on the Setting Button placed on the top right corner.
3. Add the relevant details in the terms and conditions section.
4. If you add details in points then they will appear in the same way in every invoice. You can also edit these details specific to every invoice in the step 2 of creating an invoice.
5. Click on the save button at the bottom of the page and confirm.

How does the Invoice look?

Click Here to see a sample invoice. You can also preview every invoice in the step 3 of creating an invoice. This preview will be how the invoice will appear after creation for emailing and printing.

I made a wrong entry in the Invoice; How do I correct it?

If you have made a wrong entry in the invoice then you cannot change it. The only way to edit it is to cancel the invoice and create another. Please note you will not be able to use that invoice number again in that financial year.

Can I change the Invoice Template? [No need for the question right now]

No, not at this point.

I got excess payment from Clients, what do I do?

There is no need to worry, after entering the payment in all the relevant Invoices you can add the remaining payment to a credit note. You can always adjust it later. This amount will always show in your account.

I made a wrong entry in the payments section, how do I change that?

The only way to correct the entry in the payments section is to adjust it accordingly. If you fail to do so you can always contact us at info@roaringstudios.com for further assistance.

I got excess payment from Clients, but I have to return it; How do I do that?

There is no need to worry. While making the entry, simply choose the type of transaction to return payment and a negative entry of the amount will be made.

My order has been cancelled, what do I do?

No need to worry, all you need to do is to cancel the specific invoice and the amount will be automatically reversed from the account as well. Please note you will not be able to use that invoice number again in that financial year.