

STOCK2TRACK

Getting Started

Your first week with STOCK2TRACK — set up, sell, buy, collect, close the day and back up

[START HERE](#)

Your first week

This short guide takes you from a new installation to your first day of trading. Each chapter points to the full manual and the Academy videos for more.

Day	Do this
Day 1	Business details, logins and roles (Chapters 1–2)
Day 1–2	Products and opening stock (Chapters 3–4)
Day 3	First sales, and receiving a purchase (Chapters 5–6)
Every day	Collect dues, close the day, back up (Chapters 7–9)

Chapters

1. Your Business Details
2. A Login for Every Person
3. Your Products
4. Opening Stock
5. Your First Sale
6. Recording a Purchase
7. Collecting What Customers Owe
8. Closing the Day
9. Backing Up

Your Business Details

Your company name, GSTIN, address and state print on every bill.

Who	Owner	How often	Day 1
-----	-------	-----------	-------

Why it matters

The state decides whether bills charge CGST and SGST or IGST. Get it right before the first bill.

How to use it

- 1. Open **Admin > Company**. Check the name, contacts, **GSTN**, address and **State**, and edit them in the row.
- 2. Press **Upload Logo** to put your logo on bills.
- 3. Add each extra shop, godown or van in **Admin > Locations**.

STOCK2TRACK

CLASSIC BLUE

QUICK INVOICE

NEW INVOICE

Company Setup

1

Add New Company

Company Name

Contact Person

Contact Person Mobile

Land Line

Mobile

Email

☐ GST Company

GSTN

Second Line

H No.

Street Details

Extra Address Line

City

3

State **

Telangana

Pin Code

4

UPLOAD LOGO

+ ADD COMPANY

X CLEAR

Search

Q

☒ Word Search ☐ Full Search

Found 1 records

Figure 1. Company details

- 1

Add a company
- 2

Your company: contacts, GSTIN and address, edited in place
- 3

State: decides CGST + SGST or IGST
- 4

Logo printed on bills

Before you start

You are signed in as the owner (Admin role).

Good to know

- More: Admin & Owner Controls manual, chapter 5.

A Login for Every Person

Give each person their own login and a role that allows only what their job needs.

Who	Owner	How often	Day 1
-----	-------	-----------	-------

Why it matters

Every bill and every change records who made it. Shared logins make that worthless.

How to use it

- 1. Open **Admin > User Roles** and create roles such as Cashier and Store Manager with only the permissions they need.
- 2. Open **Admin > Users**, press **Add User**, and give each person a User ID, password, role and branch.
- 3. Keep the Admin role for yourself.

STOCK2TRACK

CLASSIC BLUE

QUICK INVOICE

NEW INVOICE

User Management

Search
Name, User ID, Role...

1 ADD USER

MANAGE ROLES

4 Users found.

Actions	2 Status	3 Last Login	User ID	User Name	Role Name	Role Details	7 Location	UID	Type	Supplier	Is Customer
4 5 6	Active	16-Oct-2026 08:55 AM	demo	Demo Admin	Admin	Administrator	Main Store		User		No
	Active	16-Oct-2026 09:12 AM	ravi	Ravi Kumar	Cashier	Billing counter	Main Store		User		No
	Active	16-Oct-2026 10:02 AM	suresh	Suresh Babu	Store Manager	Runs one branch	Kukatpally Branch		User		No
	Active	15-Oct-2026 06:40 PM	kiran	Kiran Kumar	Cashier	Billing counter	Kukatpally Branch		User		No

Figure 2. Users

- 1

 Add a login
- 2

 Active or switched off
- 3

 When the login was last used
- 4

 Edit the login

5

 Reset the password

6

 Switch the login off (or on)

7

 The branch the person works at

STOCK2TRACK

CLASSIC BLUE

8

QUICK INVOICE

NEW INVOICE

Roles & Privileges

1

Role Name

2

Description

5

+ CREATE NEW ROLE

6

APPEND TO SELECTED

Available Privileges

4

☐ Privilege

☒ Admin

☐ Backup

☐ Company Creation

☐ Company View

☐ Role Create

3

> ADD

< REMOVE

Selected Privileges

☐ Privilege

7

Existing Roles

Actions	☐	Role Name	Description
	☐	Admin	Administrator
	☐	Only CRM	Only CRM
	☐	Cashier	Billing counter
	☐	Store Manager	Runs one branch

Figure 3. Roles

- 1

Name and description of a new role
- 2

Every permission, grouped by area
- 3

Move ticked permissions across, or back
- 4

Permissions the new role will have
- 5

Create the role
- 6

Add the chosen permissions to roles ticked below
- 7

Your roles: view or delete

Before you start

Owner.

Good to know

- More: Admin & Owner Controls manual, chapters 1–4.

Your Products

Each product with its barcode, HSN, price including GST, GST rate and category.

Who	Owner, stock staff	How often	Day 1–2
-----	--------------------	-----------	---------

Why it matters

The bill works out GST from these rates, and the reorder level tells you when to buy more.

How to use it

1. Press **Add Product**. Type the title, barcode (or **Generate**) and HSN code.
2. Enter the MRP including GST, the cost price, and SGST % and CGST % (half the rate each).
3. Choose the category, set the reorder level, and press **Save Product**. Many products at once: **Download Template**, fill it in, **Import Excel**.

The screenshot shows the 'Edit Product' form in the STOCK2TRACK application. The form is titled 'Edit Product' and has a blue header bar with the application name and navigation links. The form contains several input fields and sections:

- 1** Title: Men's Cotton Shirt - Blue Check
- 2** HSN Code: 6205
- 3** MRP (incl GST): 1,199.00
- 4** Cost Price: 751.80
- 5** Offer Price (incl GST): 1,199.00
- 6** Category: MEN'S WEAR

Other visible fields include: Barcode (10001), Description (Men's Cotton Shirt - Blue Check by UrbanThread), IGST % (5.00), CGST % (2.50), SGST % (2.50), Basic Price (1,141.90), MRP (Excl GST) (1,141.90), Offer Price (Excl GST) (1,141.90), Discount % (0.00), Brand (UrbanThread), UQC (PCS), Article Code (ART-10001), and Size (L).

Figure 4. A product

- | | |
|-----------------------------|-------------------------------------|
| 1 Name and barcode | 4 GST and cess rates |
| 2 HSN code | 5 Selling price if below MRP |
| 3 MRP and cost price | 6 Category |

Before you start

Categories are created with the **New** button next to Category.

Good to know

- More: Inventory manual, chapter 2; GST manual, chapter 2.

Opening Stock

Enter what is on your shelves today, so stock starts right.

Who

Stock staff

How often

Day 2

Why it matters

Every sale and purchase changes stock from this starting point.

How to use it

1. Open **Inventory › Update Quantity**, search for the product and press **Add Qty**.
2. Type the quantity and choose the location. For batch items type the batch, MRP and expiry; for serial items type each serial number.
3. Press **Add** and confirm.

STOCK2TRACK

CLASSIC BLUE

QUICK INVOICE

NEW INVOICE

Update Quantity

1

Search Product

Location

Main Store

Category

All Categories

	Actions	Product Name	Barcode	Price (Excl GST)	Available
	3				2
	ADD QTY	18K Diamond Ring	50003	46,897.60	3
	ADD QTY	22K Gold Bangles (pair)	50002	2,57,779.05	3
	ADD QTY	22K Gold Chain 20 inch	50004	1,01,072.40	3
	ADD QTY	22K Gold Coin 8 g	50008	63,948.00	2
	ADD QTY	22K Gold Earrings – Jhumka	50005	71,795.50	2
	ADD QTY	22K Gold Necklace – Lakshmi Design	50001	2,01,031.20	3
	ADD QTY	Assam Tea 500 g	10133	266.67	35
	ADD QTY	Basmati Rice 5 kg	20003	618.10	65
	ADD QTY	Bath Soap 4-Pack	10138	135.59	18
	ADD QTY	Bath Towel – Cotton	10016	427.62	125
	ADD QTY	Brownie with Ice Cream	40017	142.86	200
	ADD QTY	Butter Naan	40006	47.62	200
	ADD QTY	Charging Port Module	30003	761.86	12
	ADD QTY	Chicken 65	40011	228.57	200

Figure 5. Update Quantity

- 1

Find the product and location
- 2

Stock now
- 3

Add or remove stock

Before you start

Products added first.

Good to know

- More: Inventory manual, chapter 3.

Your First Sale

Scan or search the items, take the payment with one tap, and print.

Who	Cashier	How often	Every sale
-----	---------	-----------	------------

Why it matters

Fast billing at the counter, with stock and GST handled for you.

How to use it

1. Open **Sales › Easy Invoice**. Scan each barcode or search by name.
2. Type the customer's phone (or tick **Unknown** for a walk-in).
3. Tap the payment method and save. The bill prints, stock goes down, and the sale appears on the dashboard.

The screenshot shows the 'Easy Invoice' screen in the STOCK2TRACK app. The interface is divided into several sections:

- Top Bar:** Includes a menu icon, 'STOCK2TRACK' logo, 'CLASSIC BLUE' status, a notification bell, and buttons for 'QUICK INVOICE' and 'NEW INVOICE'.
- Easy Invoice Section:**
 - 1:** A search bar with a camera icon and buttons for 'LIVE EEPF' and 'ASK TO PAY'.
 - 2:** A list of items added to the invoice, including 'Men's Linen Kurta' and 'Women's Printed Saree'.
 - 3:** Customer information fields for 'Phone *', 'Name', and 'Company'.
 - 4:** Payment method selection buttons: 'CASH', 'UPI', 'CARD', and 'CREDIT'.
 - 5:** A 'Split / edit amounts' button.
 - 6:** A 'More options (date, rep, notes, discount)' button.
 - 7:** A 'CLASSIC SCREEN' button in the top right corner.
- Summary:** A large blue box showing the subtotal as ₹4,998.00, with GST details below it.

Figure 6. Easy Invoice

- | | |
|---|--|
| <ol style="list-style-type: none"> 1 Scan, or search a product 2 Each line is a card: change quantity or remove 3 Customer's phone for points, credit and WhatsApp 4 One tap: Cash, UPI, Card or Credit | <ol style="list-style-type: none"> 5 Split the payment or edit amounts 6 Date, rep, notes and discount 7 Switch to the classic billing screen |
|---|--|

STOCK2TRACK

CLASSIC BLUE

QUICK INVOICE

NEW INVOICE

Print Invoice #14116

1 Template

Single Page Classic - A4

Classic invoice on A4 paper - A4 Portrait

2 Printer (for Direct Print)

-- Open as PDF (Default) --

PDF will open in default viewer for manual printing

3

VIEW PDF

SAVE PDF

4

SEND WHATSAPP

5

HIDE PREVIEW

BACK

Preview - Single Page Classic - A4 A4 Portrait

14116

Tax Invoice

Stock2Track Demo Store

Fashion & Home Essentials

Tax Invoice No : 14116

Date: 10-10-2026 16:16:06

Stock2Track Demo Store

Shop No. 12, Demo Market Road

Ameerpet

Hyderabad

Telangana, 500016

9000012345, 040-40000000

store@example.com

GSTN: 36ABCDE1234F1Z5

Sunrise Boutique (Demo)

Road No. 5, Jubilee Hills, Hyderabad

GST: 36AAACS0000Z1Z5

Phone : 9000000150

Email : accounts@example.com

SNo.	Description	HSN	Price(Rs.)	Quantity	Discount	SGST	CGST	Total
01.	Basmati Rice 5 kg	10063020	597.00	11.00	572.00	156.36	156.36	6567.00
02.	Toor Dal 1 kg	0713	174.00	16.00	240.00	66.29	66.29	2784.00

Figure 7. Printing a bill

1

Choose the template (A4, A5, thermal)

2

Choose a printer for direct printing

3

Open or save the PDF

4

Send the PDF on WhatsApp

5

Preview of the printed invoice

Before you start

A cashier login; products with stock.

Good to know

- More: Sales & Invoices manual; Academy lessons 1–4.

Recording a Purchase

Enter the supplier's bill, then the quantities received, so stock goes up and you know what you owe.

Who	Owner, stock staff	How often	When goods arrive
-----	--------------------	-----------	-------------------

Why it matters

Purchases recorded on time mean right stock, right costs and right GST input credit.

How to use it

1. Open the supplier and use **Add Invoice**: bill number, date, amount and the GST on the bill. Press **Save Invoice**.
2. Press **Add Quantities** on the bill and enter each product, quantity and cost. Stock goes up when you save.

STOCK2TRACK

CLASSIC BLUE

QUICK INVOICE

NEW INVOICE

AG-2501024	23-Jan-2025	Invoice	Stock2Track Demo Store	Kukatpally Branch
AG-2501025	23-Jan-2025	Invoice	Stock2Track Demo Store	Main Store
AG-2501020	22-Jan-2025	Invoice	Stock2Track Demo Store	Main Store
AG-2501016	21-Jan-2025	Invoice	Stock2Track Demo Store	Main Store
AG-2501012	20-Jan-2025	Invoice	Stock2Track Demo Store	Kukatpally Branch
AG-2501010	19-Jan-2025	Invoice	Stock2Track Demo Store	Main Store

Add Invoice

1

SCAN INVOICE

2

Invoice No

16-10-2026

Invoice Date

3

Payable Amount

0

4

SGST

0

CGST

0

IGST

0

CESS

0

5

GRN No

6

SAVE INVOICE

Company

Stock2Track Demo St...

Location

Main Store

Invoice

Debit Note

Figure 8. A supplier bill

- 1

Read a scanned bill instead of typing
- 2

Supplier's invoice number and date
- 3

Total payable, including GST
- 4

GST on the bill: SGST, CGST, IGST and cess
- 5

Goods receipt number
- 6

Save the bill (stock is added next)

STOCK2TRACK

CLASSIC BLUE

QUICK INVOICE

NEW INVOICE

BACK TO INVOICES

Apex Garments Wholesale – Invoice No. AG-2610171

Add Product

Product Name

Line Items

Product Name	Barcode	Qty	Unit Cost	Disc %	Disc	SGST %	SGST	CGST %	CGST	IGST %	IGST	Total Cost	Batch No	Batch MRP	Expiry
Kids Denim Shorts	10014	22	380.83	0	0.00	2.5	209.46	2.5	209.46	0	0.00	8,797.17			
Totals		22.00			0.00		209.46		209.46		0.00	8,797.17			

SAVE QUANTITIES

Figure 9. Receiving the goods

- Find the product received
- Quantity, unit cost before GST, discount and GST
- Batch number
- Expiry date for perishable items
- Save: stock goes up

Before you start

The supplier added in Purchases > Suppliers.

Good to know

- More: Purchases manual.

Collecting What Customers Owe

Everyone with unpaid bills, and recording their payment.

Who	Cashier, manager	How often	Daily
-----	------------------	-----------	-------

Why it matters

Credit given is money lent. Recording each payment clears the oldest bills first.

How to use it

- 1. Open **Finance > Due Payments**. Customers are listed with the largest due first.
- 2. Press **Record Payment**, type the amount, date and payment type, and press **Save**.

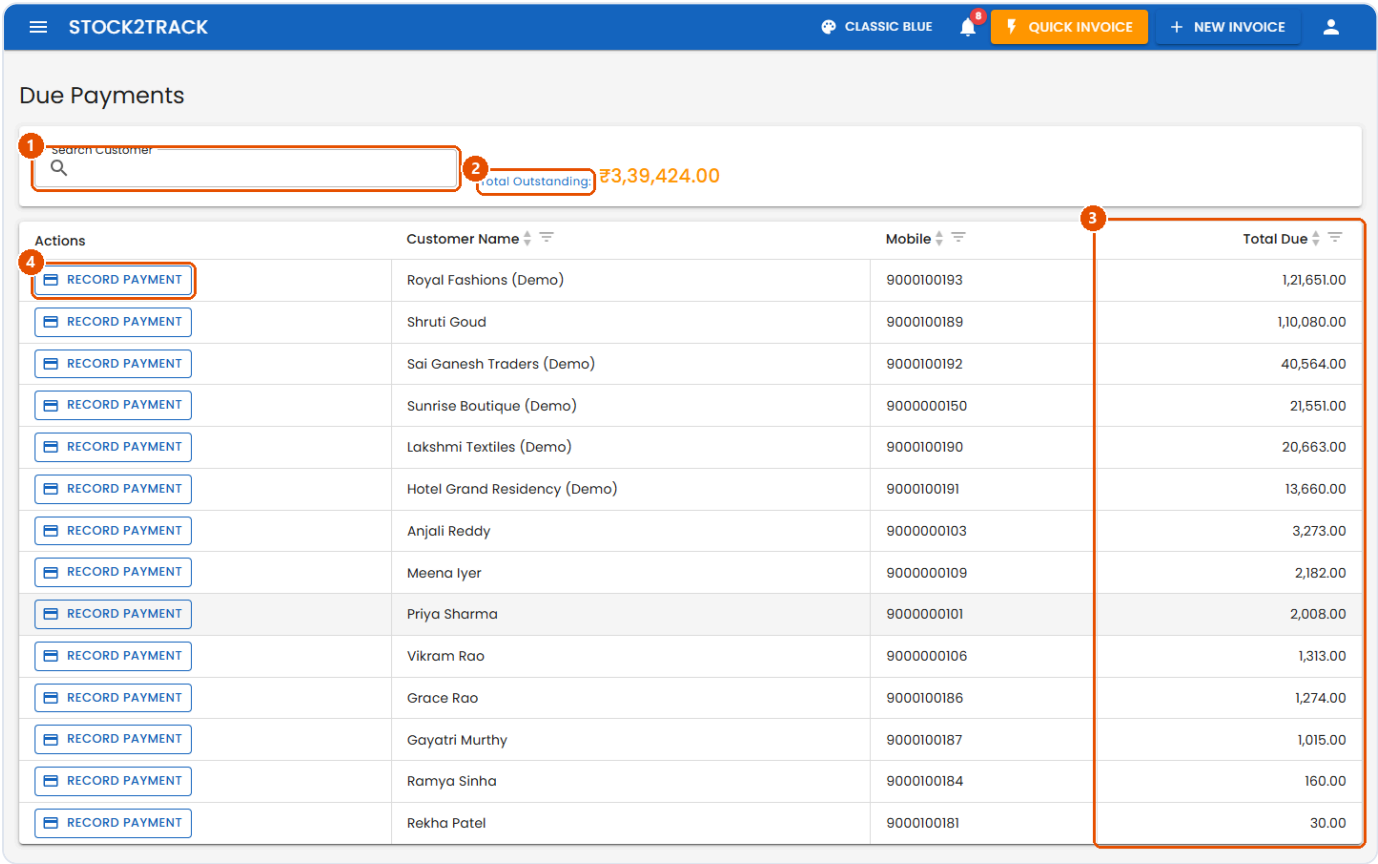


Figure 10. Due payments

- 1 Find the customer
- 2 Total owed to you
- 3 What each customer owes
- 4 Record their payment

Before you start

Privilege **Payments**.

Good to know

- More: Finance manual, chapter 2.

Closing the Day

The day's sales, tax and collections by payment method, against the cash in the drawer.

Who	Owner, cashier	How often	Every evening
-----	----------------	-----------	---------------

Why it matters

A shortage found today has a name and a reason. Found next month, it has neither.

How to use it

- 1. Open **EOD Report** and press **Generate** (today is selected).
- 2. Count the cash in the drawer and compare it with the **Cash** figure.
- 3. Look at the bell for alerts: deleted bills, missed backups, low stock.

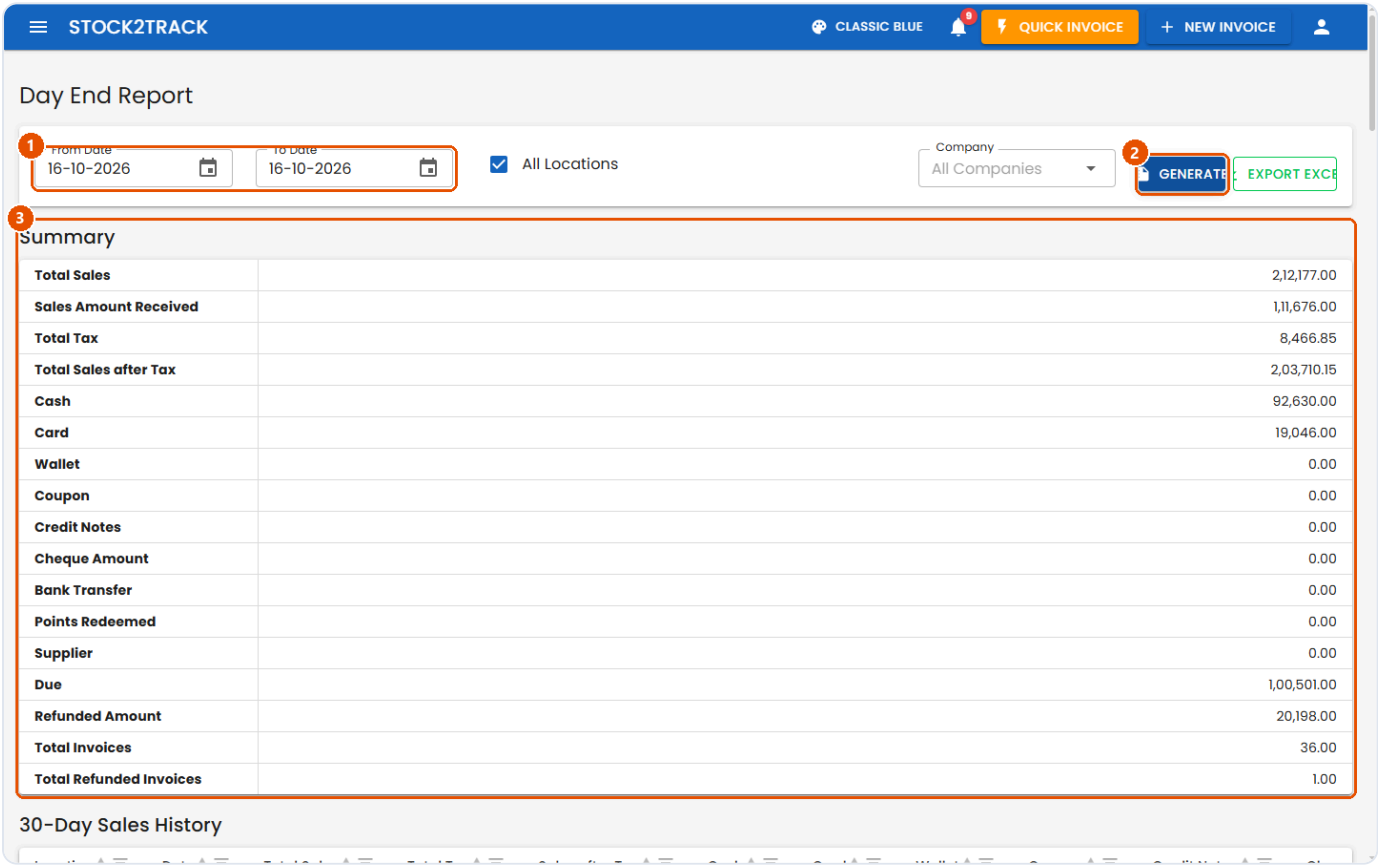


Figure 11. Day-end report

- 1 The day (or period)
- 2 Generate
- 3 Sales by how customers paid

Before you start

Privilege **EOD Report View**.

Good to know

- More: Finance manual, chapter 8; Admin & Owner Controls, chapter 12.

Backing Up

A copy of all your data, saved and checked, in a folder that leaves this computer.

Who	Owner	How often	Every evening
-----	-------	-----------	---------------

Why it matters

A failed disk or a stolen laptop costs you a computer, not your business.

How to use it

1. In **Admin > Settings**, set the **Backup Folder** to a Google Drive or OneDrive folder, or a USB drive.
2. Open **Admin > Backup / Restore** and press **Backup Now**. The backup is checked and listed in the history.
3. The bell reminds you when the last backup is too old.

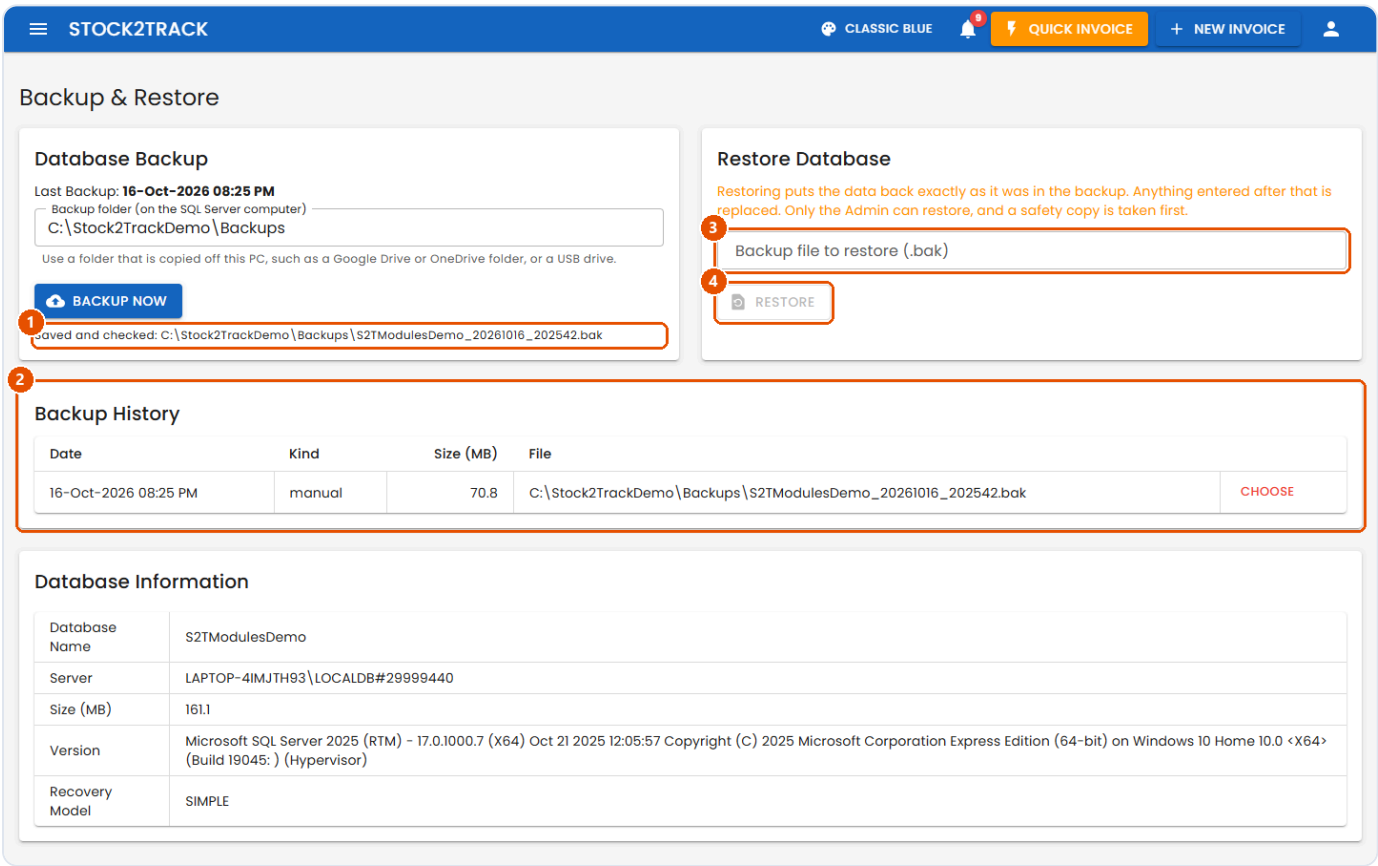


Figure 12. Backup and restore

- 1

Saved and checked
- 2

Every backup, with date and size
- 3

Backup to restore (owner only)
- 4

Restore

Before you start

Owner.

Good to know

- More: Admin & Owner Controls manual, chapter 11.

Where to learn more

Manual (PDF)	Covers
Sales & Invoices	All billing screens, quotes, returns, printing
Purchases	Suppliers, bills, receiving, purchase orders, paying suppliers
Inventory	Products, stock, counts, transfers, reports
Finance	Bank accounts, dues, P&L, cash flow, day end
Expenses	Expense vouchers and reports
GST	Setup, tax reports, GSTR-1, e-invoice, e-way bill
Admin & Owner Controls	Roles, discount limits, logged deletes, backup
Customers & CRM	Customers, leads, tasks, appointments, footfall
Analytics	The owner's dashboards and AI assistant
Service Jobs & Assets, Restaurant, Jewellery, HR/Payroll, eCommerce	Each module

The **STOCK2TRACK Academy** has a short video for every task; see the Academy index in this package.