

STOCK2TRACK

Sales & Invoices

User manual and guide — billing at the counter, quotes, delivery
challans, returns and collecting dues

How to use this guide

This guide covers selling in STOCK2TRACK: setting up invoices, the four billing screens, printing, returns, quotes, delivery challans and collecting what customers owe. Each chapter explains what the screen is for, why it matters, the steps, annotated screenshots (orange numbers match the list under each picture), and what must be set up first.

Which billing screen should I use?

Screen	Best for
Sales Invoice (classic)	Every kind of sale: credit customers, serials, batches, several tenders, delivery addresses.
Easy Invoice	Fast counters: scan and tap one payment button.
Advanced Invoice	Trained staff on a keyboard, with a customer display and margins.
Quick Invoice	Touch screens and fixed menus without barcodes.

Before your first bill

- Products have a selling price (MRP), GST rate and HSN code; stock has been entered.
- Your company and each branch have their GSTIN and state; customers have a state, so GST splits correctly into CGST + SGST or IGST.
- Invoice settings are saved (Chapter 1) and the print template matches your printer.
- Staff have the **Invoice Creation** privilege (Admin > User Roles).

Chapters

1. Invoice Settings
2. Finding an Invoice
3. Creating an Invoice
4. Easy Invoice (one-tap billing)
5. Advanced Invoice (keyboard billing)
6. Quick Invoice (touch POS)
7. Viewing and Printing an Invoice
8. Invoice Template Designer
9. Returns and Credit Notes
10. Quotes and Estimates
11. Delivery Challans
12. Customer Ledger and Collecting Dues
13. Due Payments
14. Coupons
15. Invoice Report

Invoice Settings

The settings that decide how every invoice behaves: the print template, the default payment type, stock rules, pop-ups and the messages sent with a bill.

Who	Owner, administrator	How often	Once, then when your process changes
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Why it matters

Set these once and every counter bills the same way. Wrong defaults (for example the wrong print template) cost time on every single bill.

How to use it

1. Open **Admin › Settings** and find the invoice section.
2. Choose the **Invoice Print Template** your printer uses (A4, A5 or 2-/3-inch thermal) and the **Invoice Default Payment Type**.
3. Decide the stock rules: **Add in FIFO** (sell the oldest batch first), **Delivered with Invoice** (stock leaves when billed) and whether the same product may appear twice on a bill.
4. Switch on **Invoice Qty Popup** if staff should confirm quantities, and **Partner Required** if every bill needs a sales partner.
5. Set the loyalty points rules (**Rupees to Points, Min Points for Redeem**) and whether bills are sent on WhatsApp or SMS.
6. Press **Save**. Settings are read when a user signs in, so sign out and in again.

STOCK2TRACK

CLASSIC BLUE

8

QUICK INVOICE

+ NEW INVOICE

General

Rep Commission %

5

Barcode Length

5

Default GST %

5

Profit Margin %

Backup Folder

C:\Stock2TrackDemo\Backups

Primary Company

Stock2Track Demo Store

Invoice Default Payment Type

Cash

Invoice Print Template

-- No default --

Pre-selected template on the invoice print screen and WhatsApp PDFs

Default Barcode Type

6

Print & Font

Title Font Size

9

Header Font Size

8

Content Font Size

6

Thermal Print Font

8-PM.ttf

A4

3 Inch

Custom Labels

Location Name

Prd Field1

Shelf

Prd Field2

Rack

Serial Text

Serial

Serial Print

IMEI: <SerialNo>

Invoice Due Period

Number

1

Days

Weeks

Months

Years

Report Days

Number

1

Days

Weeks

Months

Years

Refunds CN Days

Number

1

Days

Weeks

Months

Years

Figure 1. Payment, print template, messages and points

- 1

Payment type selected by default on new bills
- 2

Print template used for invoices and WhatsApp PDFs
- 3

SMS / WhatsApp message sent with each bill
- 4

Loyalty points: rupees per point and the minimum to redeem

Feature Toggles

☒ Invoice Partner Required	☒ Products - IsService Ticked	☐ GST Company Ticked	☒ Unknown User
☒ Invoice Price Change	☒ Products - IsTrackable Ticked	☒ Same as GST	☒ DOB Required
☐ Duplicate Inv Items	☒ Products - WordSearch	☐ Discount in Modern Template	☒ Refunds Pay Now
☒ Add in FIFO	☐ Part Word Search	☐ Add Partner Discounts	☒ Show Cost Price
☐ Invoice Qty Popup Required	☒ Is Primary Image Ticked	☐ Profit Margin Type	☐ Gender in Products
☒ Invoice Template Full Page	☒ Img in Inventory	☐ Auto Serial	☐ Enable Pole Display
☐ Invoice Extra Columns Needed	☒ Image in Invoice	☐ Auto Accept Inventory	☒ Ship address needed
☐ Split Payment	☐ Open Barcode	☒ UPI in Invoice	☒ Delivered with Invoice
			☐ Email after Invoice
			☐ Print Location Address
			☐ Expiry forever

WhatsApp & KOT

☐ Enable Whatsapp ☐ Send msg with Invoice ☐ Enable KOT

Figure 2. Invoice behaviour switches

- | | |
|---|---|
| 1 Sell the oldest batch first | 4 Stock leaves when the bill is made |
| 2 Allow the same product twice on one bill | 5 Send a message with every invoice |
| 3 Ask for the quantity on every scan | 6 Save, then sign in again |

Before you start

Administrator rights. The **Default Billing Screen** (classic or Easy Invoice) is set by your installer.

Good to know

- Change one setting at a time and test a bill before the counter opens.

Finding an Invoice

Every bill in one list, filtered by date, company and branch, with totals for the period.

Who	Counter staff, owner	How often	Every day
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Why it matters

Reprint, resend or correct any bill in seconds when a customer comes back.

How to use it

1. Open **Sales > Sales Invoice**. Today's bills are shown.
2. Change **From Date**, **To Date**, **Company** or **Location**, or type a name, phone or invoice number in **Search**, and press **Filter**.
3. Use the row icons to view, print, edit, send on WhatsApp or delete a bill.
4. Press **New** to start a bill.

STOCK2TRACK

CLASSIC BLUE

QUICK INVOICE

+ NEW INVOICE

Invoices

1

From date

16-09-2026

To date

16-10-2026

Company

All

Location

All

2

Search

3

FILTER

4

+ NEW

5

Total Invoices

825

Total Amount

₹17,99,447.00

Paid

₹15,90,909.00

Due

₹2,08,538.00

6	Actions	Invoice #	Customer	Company	Phone	Date	Amount	Due	Paid
	    	14415	Bengaluru Trends Pvt Ltd	(Demo)	9000200073	03-10-2026 19:17:15	41,700.00	0.00	Paid
	    	14414	Bengaluru Trends Pvt Ltd	(Demo)	9000200073	12-10-2026 19:17:15	41,700.00	0.00	Paid
	    	14413	Shruti	Goud	9000100189	30-09-2026 20:17:15	48,305.00	0.00	Paid
	    	14412	Shruti	Goud	9000100189	07-10-2026 20:17:15	2,65,512.00	1,06,205.00	Partial
	    	14411	Vidya	Gupta	9000100039	13-10-2026 20:17:15	80,415.00	0.00	Paid
	    	14410	Yamini	Iyer	9000100006	16-10-2026 20:17:15	1,04,105.00	0.00	Paid
	    	14409	UNKNOWN	UNKNOWN		08-10-2026 19:44:00	1,362.50	0.00	Paid
	    	14408	UNKNOWN	UNKNOWN		03-10-2026 13:18:00	891.50	0.00	Paid
	    	14407	UNKNOWN	UNKNOWN		05-10-2026 20:10:00	984.50	0.00	Paid
	    	14406	UNKNOWN	UNKNOWN		22-09-2026 14:06:00	777.00	0.00	Paid
	    	14405	UNKNOWN	UNKNOWN		02-10-2026 12:32:00	597.50	0.00	Paid
	    	14404	UNKNOWN	UNKNOWN		01-10-2026 20:59:00	1,322.00	0.00	Paid

Figure 3. The invoice list

- 1

Dates, company and branch
- 2

Search by name, phone or invoice number
- 3

Apply the filters
- 4

Start a new bill
- 5

Totals for the period: count, amount, paid and due
- 6

View, print, edit, WhatsApp or delete

Before you start

Privilege **Invoice Reprint** to see the list; **Invoice Creation** to edit.

Good to know

- **Avoid deleting invoices.** Deleting puts the stock back, but the invoice number is left unused: report it as cancelled in your GST return. To undo a sale, issue a return (credit note) instead.

Creating an Invoice

The full billing screen: scan or search products, set quantities and discounts, pick the customer, take payment in any mix of tenders, and create the bill.

Who	Counter staff	How often	Every sale
-----	---------------	-----------	------------

Why it matters

One screen handles walk-in sales, credit sales to known customers, serial-numbered items, points and coupons.

How to use it

1. Scan the barcode, or type in **Product Name** and choose the item. Use **Camera Scan** on a laptop with a webcam.
2. Check each line: MRP, offer price, quantity and discount. For serial-numbered items, choose the serials and press **Add Selected**.
3. Type the customer's **Phone**. A known customer fills in, with points and dues. Tick **Unknown** for a walk-in.
4. In the payment panel, enter what is paid in each tab: Cash, Card, Wallet/UPI, Cheque, Coupon, Credit Note, Points or Bank Transfer. Anything unpaid stays as due.
5. Press **CREATE INVOICE**. Send it on WhatsApp when asked, and print it.
6. Busy counter? Press **Park** to hold a bill and serve the next customer; reopen it from **Parked**.

STOCK2TRACK

CLASSIC BLUE

8

QUICK INVOICE

NEW INVOICE

Create Invoice

7

CREATE INVOICE

8

PARK

PARKED (0)

CANCEL

Add Product

1

barcode

Scan or type barcode

+

2

Product Name

Serial Number

Enter serial number

LIVE ₹339

ASK TO PAY

3

Line Items (2)

Show Images

Delivered

Add in FIFO

Popup Needed

	Product Name	Serial #	HSN	MRP	Offer Price	Qty	Del. Qty	Disc%	Disc
☐	Men's Linen Kurta	-	6211	2,799.0	2,799.0	1.00	1.00	0.00	0
☐	Women's Printed Saree	-	5208	2,199.0	2,199.0	1.00	1.00	0.00	0

4

Customers also buy:

Women's Sandals – ₹899

Cotton Handkerchief Pack of 6 – ₹249

Men's Cotton Shirt – Blue Check – ₹1199

Bath Soap 4-Pack – ₹160

Customer

5

Phone

9000100039

Name

Vidya

Company

Gupta

State

Telangana

Unknown

Pay Before Date

16-10-2026

Overall Discount %

0.00

6

Grand Total:

4,998.00

Subtotal: 4,998.00

Excl.GST: 4,466.32

SGST: 265.84

CGST: 265.84

Payment

CASH

CARD

Cash Amount

4,998.00

Total Paid:

4,998.00

Due Amount:

0.00

Adjust Final Amount

New Total (current: 4,998.00)

0.00

APPLY

Difference is distributed proportionately across items; GST is recalculated per item.

Figure 4. Products and customer added

- | | | | |
|---|--|---|---|
| 1 | Scan a barcode (or use the camera) | 5 | Customer's phone: name, points and dues fill in |
| 2 | Or search by product name | 6 | Grand total with the GST split |
| 3 | Lines: MRP, offer price, quantity and discount | 7 | Create the invoice |
| 4 | Products other customers often buy with these | 8 | Park the bill and serve the next customer |

STOCK2TRACK

CLASSIC BLUE

8

QUICK INVOICE

+ NEW INVOICE

Add Product

Barcode

Scan or type barcode

+

Product Name

Serial Number

Enter serial number

LIVE ₹339

ASK TO PAY

Line Items (2)

Show Images

Delivered

Add in FIFO

Popup Needed

	Product Name	Serial #	HSN	MRP	Offer Price	Qty	Del. Qty	Disc%	Disc
☐	Men's Linen Kurta	-	6211	2,799.0	2,799.0	1.00	1.00	0.00	0
☐	Women's Printed Saree	-	5208	2,199.0	2,199.0	1.00	1.00	0.00	0

Customers also buy:

Women's Sandals - ₹899

Cotton Handkerchief Pack of 6 - ₹249

Men's Cotton Shirt - Blue Check - ₹1199

Bath Soap 4-Pack - ₹160

Customer

Unknown

Phone *

9000100039

Name

Vidya

Company

Gupta

Email

GSTIN

State

Telangana

Referred By

Address

Nizampet, Hyderabad

Grand Total:

4,998.00

Subtotal: 4,998.00

Excl.GST: 4,466.32

SGST: 265.84

CGST: 265.84

1

Payment

CASH

CARD

Cash Amount

4,998.00

Total Paid:

4,998.00

Due Amount:

0.00

2

Adjust Final Amount

New Total (current: 4,998.00)

0.00

APPLY

Difference is distributed proportionately across items; GST is recalculated per item.

3

Pay Before Date

16-10-2026

4

Overall Discount %

0.00

Figure 5. Payment and totals

- 1

Payment tabs: Cash, Card, Wallet/UPI, Cheque, Coupon, Credit Note, Points, Bank
- 2

Round the final amount (spread across the lines)
- 3

Due date for an unpaid balance
- 4

Discount on the whole bill

Before you start

Privilege **Invoice Creation**. Products need a selling price and GST rate; customers need a state for the right GST split.

Good to know

- Overall Discount % applies to the whole bill; Adjust Final Amount rounds the total.
- A partly paid bill appears in the customer's ledger and in Due Payments.

Easy Invoice (one-tap billing)

A simpler billing screen: scan, then tap one big button for how the customer paid — Cash, UPI, Card or Credit.

Who	Counter staff	How often	Every sale (fast counters)
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Why it matters

Fewer taps per bill. New staff learn it in minutes; points and store credit are one button each.

How to use it

1. Open **Sales › Easy Invoice** and scan or type products. Each line is a card you can change.
2. Type the customer's phone if they want points or the bill on WhatsApp. Chips show their points, credit and dues; press **REDEEM** or **USE CREDIT** to use them.
3. Tap **CASH, UPI, CARD** or **CREDIT**. One tap means paid in full; Credit leaves the bill as due.
4. Need to split the payment, change the date, rep or discount? Open **More options**, or press **Classic screen**.

STOCK2TRACK CLASSIC BLUE QUICK INVOICE NEW INVOICE

Easy Invoice

1 Scan barcode or serial number... LIVE EEPF ASK TO PAY

...or search product name

Customers also buy: Women's Sandals — ₹899 Cotton Handkerchief Pack of 6 — ₹249 Men's Cotton Shirt - Blue Check — ₹1199 Bath Soap 4-Pack — ₹160

2 Men's Linen Kurta ₹2,799.00 each 1 ₹2,799.00

Women's Printed Saree ₹2,199.00 each 1 ₹2,199.00

2 Items · 2 units

Company: Stock2Track Demo Store Location: Main Store

Customer: More Unknown

3 Phone * Name Company

Partner: -- None --

Subtotal ₹4,998.00 · SGST ₹265.84 · CGST ₹265.84

4 CASH UPI CARD CREDIT

One tap = paid in full - CREDIT leaves the bill as due

5 Split / edit amounts

Total Paid: ₹4,998.00

Due Amount: ₹0.00

Round total to 0.00 APPLY

6 More options (date, rep, notes, discount)

7 CLASSIC SCREEN

Figure 6. Easy Invoice

- | | |
|--|--|
| 1 Scan, or search a product | 5 Split the payment or edit amounts |
| 2 Each line is a card: change quantity or remove | 6 Date, rep, notes and discount |
| 3 Customer's phone for points, credit and WhatsApp | 7 Switch to the classic billing screen |
| 4 One tap: Cash, UPI, Card or Credit | |

Before you start

Same as Creating an Invoice. Your installer can make Easy Invoice the default for **New Invoice**.

Good to know

- UPI is saved as a Wallet payment in reports.

Advanced Invoice (keyboard billing)

A billing screen built for the keyboard, with a customer display, a margin column, batch selection and repeat orders.

Who	Experienced counter staff	How often	Busy hours
-----	---------------------------	-----------	------------

Why it matters

Fastest for trained staff: every action has a key, and the customer sees each item on a second screen.

How to use it

1. Open **Sales > Advanced Invoice**. Press **Shortcuts** to see the keys: **F1** barcode, **F2** product, **F3** phone, **F5** create, **F7** park, **F8** parked bills.
2. Use **Customer View** or **Open in 2nd Screen** to show the bill to the customer.
3. Pick a batch for batch-tracked items; the margin column (with the Profit privilege) warns you before you discount too far.
4. **Repeat Order** loads the customer's last bill; you can also load the items of any invoice.
5. Type the cash amount in the Cash tab (it is not filled in for you) and press **F5**.

The screenshot shows the 'Advanced Invoice' form in the STOCK2TRACK application. The interface includes a top navigation bar with 'STOCK2TRACK', 'CLASSIC BLUE', and buttons for 'QUICK INVOICE' and 'NEW INVOICE'. The main form is divided into several sections:

- Advanced Invoice Header:** Contains three callouts: 1 (Shortcuts), 2 (CUSTOMER VIEW), and 3 (OPEN IN 2ND SCREEN). Buttons for 'CREATE INVOICE', 'PARK', 'PARKED (0)', and 'CANCEL' are on the right.
- Add Product:** Includes fields for Barcode (with a scan option), Product Name, and Serial Number.
- Line Items (0):** A table with columns for Product Name, Serial #, HSN, MRP, Offer Price, Qty, Del. Qty, Disc%, Disc., SGST%, SGST, and CGST%. It includes checkboxes for 'Show Images', 'Delivered', 'Add in FIFO', and 'Popup Needed'. A note says 'No items added yet'.
- Customer:** Includes fields for Phone, Name, Company, Email, GSTIN, State (dropdown), Referred By, and Address. An 'Unknown' checkbox is also present.
- Ship To:** Includes a checkbox for 'Same as billing address'.
- Payment:** Includes a 'Grand Total' of 0.00, 'Subtotal: 0.00', 'SGST: 0.00', and 'CGST: 0.00'. It has tabs for 'CASH' (selected) and 'CARD'. The 'Cash Amount' field is highlighted with callout 4. The 'Total Paid' and 'Due Amount' are both 0.00. Callout 5 points to the 'Payment' section.
- Pay Before Date:** A field with a calendar icon.
- Overall Discount %:** A field showing 0.00.

Figure 7. Advanced Invoice

- | | |
|--|--|
| 1 Keyboard shortcuts (F1–F8) | 4 Margin on each line (Profit privilege) |
| 2 Show the bill to the customer | 5 Payment: type the cash amount |
| 3 Open the customer display on a second screen | |

Before you start

Privilege **Invoice Creation; Profit** to see margins. Service job cards open here when you press Generate Invoice on a job.

Quick Invoice (touch POS)

A touch-screen point of sale with product category tiles, a running bill and a checkout panel.

Who	Counter staff	How often	Every sale (touch screens)
-----	---------------	-----------	----------------------------

Why it matters

Ideal for cafés and counters that sell from a fixed menu without barcodes.

How to use it

1. Press **Quick Invoice** in the top bar.
2. Tap a category, then tap products to add them. Tap a line to change the quantity.
3. Type the customer's phone if needed.
4. Choose the tender (Cash, Card, Wallet, Cr. Note, Coupon), enter **Cash Paid** to see the change to give back, and press **Checkout**.
5. Switch on **Auto Print**, **WhatsApp** and **Auto reset** so each bill prints, is sent and clears itself.

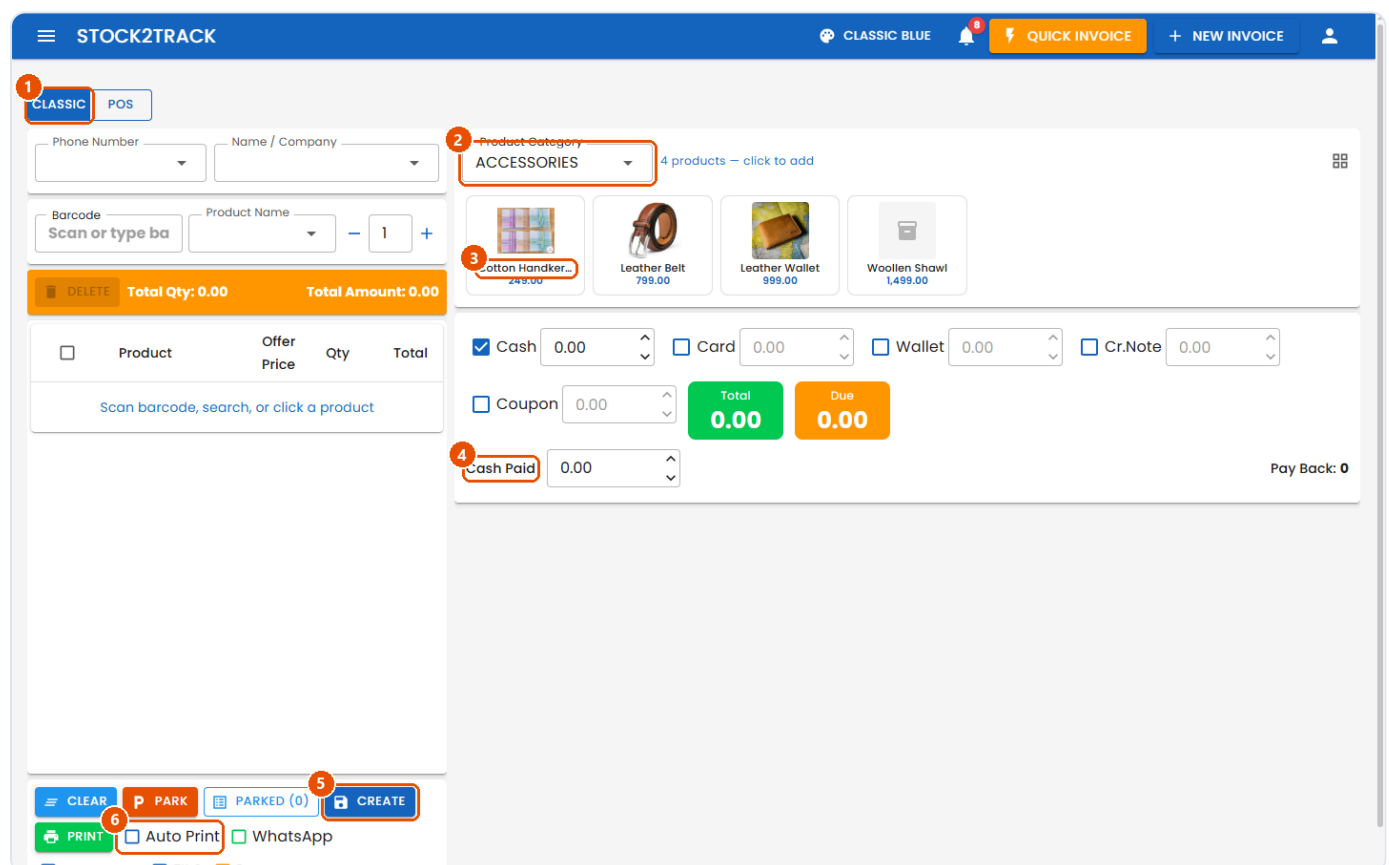


Figure 8. Quick Invoice

- | | |
|---------------------------|-------------------------------------|
| 1 Classic or POS layout | 4 Cash paid and change to give back |
| 2 Choose a category | 5 Create the bill |
| 3 Tap a product to add it | 6 Auto print, WhatsApp, auto reset |

Before you start

Product categories (collections) with products in them.

Viewing and Printing an Invoice

The invoice as saved, and the print screen with a choice of templates and printers.

Who	Counter staff	How often	Every sale
-----	---------------	-----------	------------

Why it matters

Reprint any bill in the format the customer needs: A4 for businesses, thermal for the counter, PDF for email.

How to use it

1. From the invoice list press the view icon to see the bill, its items and payments.
2. Press **Print Invoice**. Choose a **Template** and a **Printer**.
3. Press **Direct Print**, **Save PDF** or **Send WhatsApp**.

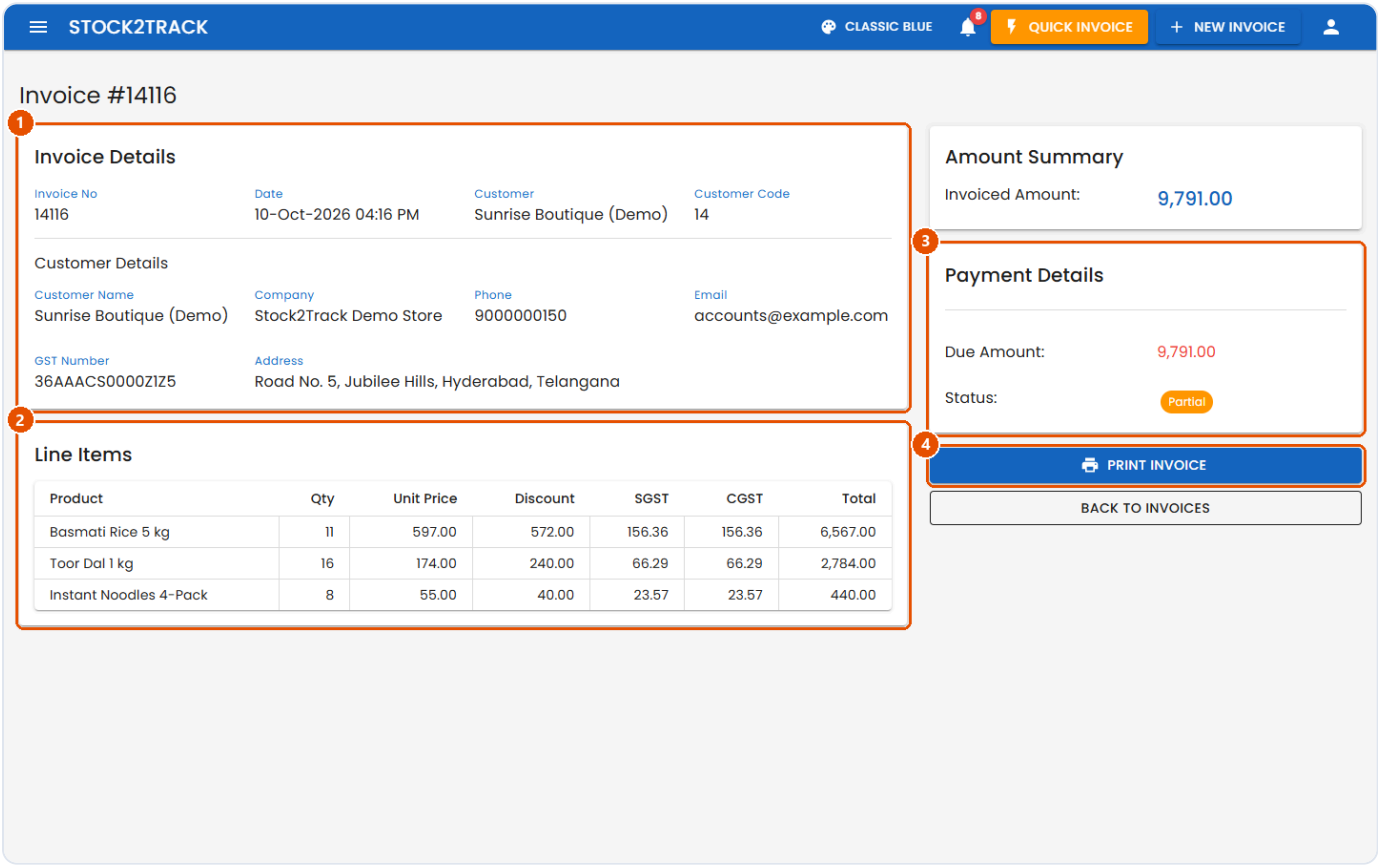


Figure 9. An invoice

- 1

Invoice and customer details
- 2

Items with discount and GST
- 3

Amount, payments and what is due
- 4

Open the print 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 10. Print preview

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

Templates are set up in the Invoice Template Designer.

Good to know

- For serial-numbered items use a template that prints serials (Multiple Page Modern 3-inch or A4 Classic).

Invoice Template Designer

Design your own invoice layout: logo, headings, columns, totals, terms, QR code and barcode, for A4 or thermal paper.

Who	Owner, administrator	How often	Once, when you set up printing
-----	----------------------	-----------	--------------------------------

Why it matters

Bills that look like your brand and carry the details your customers and auditors need.

How to use it

1. Open **Sales › Invoice Template Designer**. Starter templates are read-only: press **Clone** to make your own copy.
2. Pick a section (page header, invoice details, items, totals, footer) and add elements: static text, bound text (a field from the invoice), logo, image, line, QR or barcode.
3. Use the position and style settings on the right; press **Preview** and **Print Test**.
4. Press **Save**, then **Set as Default**. Use **Invoice Column Aliases** to rename columns for one template or all.

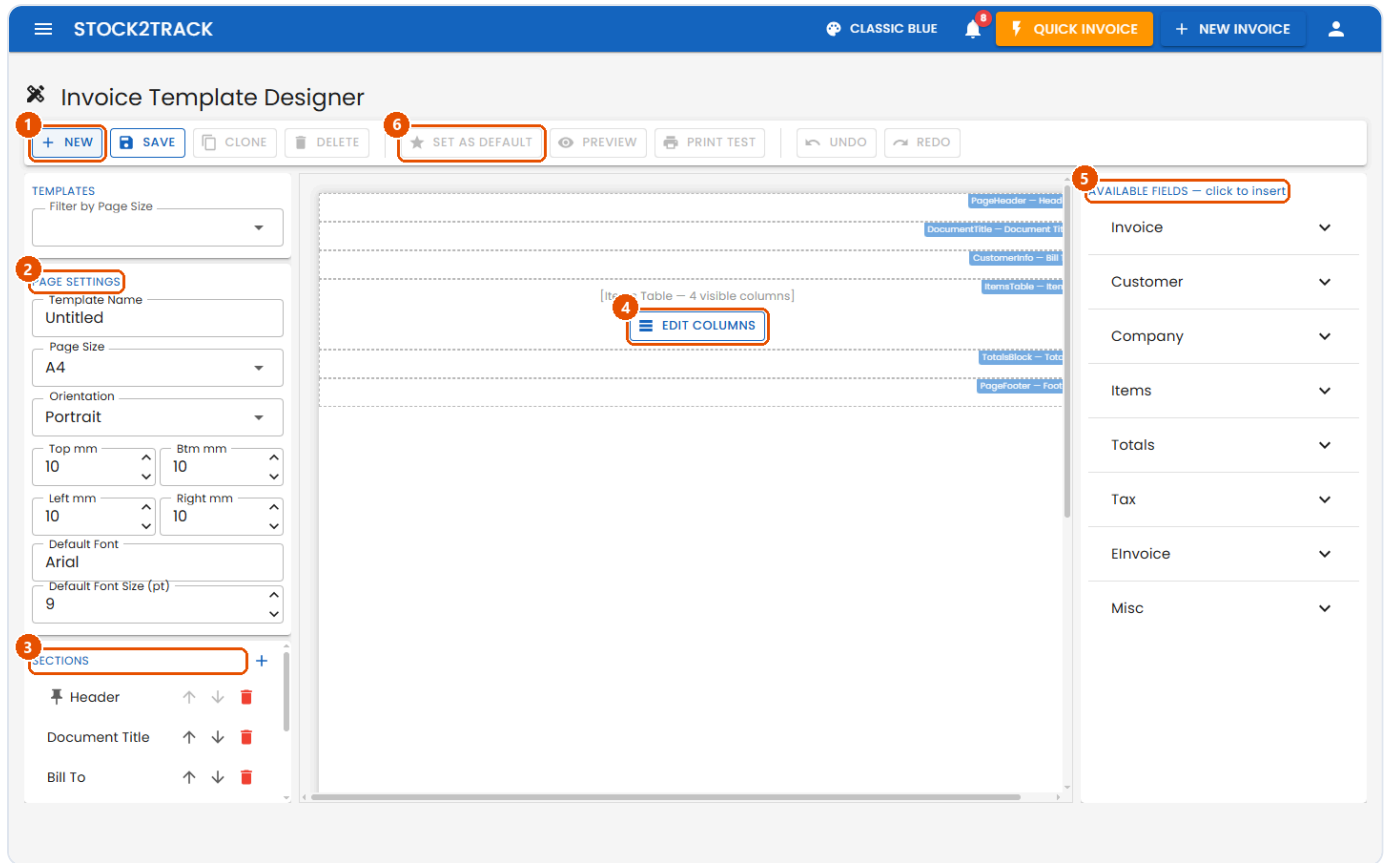


Figure 11. Template Designer

- 1 New template (or Clone a starter)
- 2 Page size, orientation and margins
- 3 Sections of the invoice
- 4 Choose and order the item columns
- 5 Fields you can place: invoice, customer, company, items, totals, tax
- 6 Make this the default template

Before you start

Administrator rights.

Returns and Credit Notes

Take goods back against the original invoice, put them back in stock, and refund the customer or give a credit note.

Who	Counter staff, manager	How often	When a customer returns goods
-----	------------------------	-----------	-------------------------------

Why it matters

Every return is tied to its bill, stock stays correct, and GST on the return is reversed properly.

How to use it

1. Open **Sales › Refunds**. Search by invoice number, name or phone and press **Select** on the bill.
2. For each item coming back, enter the **Return Qty** and press **Add to Return**.
3. Choose **Pay Now** to refund in cash, card, wallet or cheque (the refund total is filled in for you), or **Pay Later** to give a credit note the customer uses on the next bill.
4. Press **Generate Credit Note**.

Search Invoice

1

From Date To Date Location Company

2

Invoice #	Customer	Company	Phone	Date	Location	Amount	Action
14415	Bengaluru Trends Pvt Ltd (Demo)	Stock2Track Demo Store	9000200073	03-10-2026	Main Store	41,700.00	3 SELECT
14414	Bengaluru Trends Pvt Ltd (Demo)	Stock2Track Demo Store	9000200073	12-10-2026	Main Store	41,700.00	SELECT
14413	Shruti Goud	Stock2Track Demo Store	9000100189	30-09-2026	Main Store	48,305.00	SELECT
14412	Shruti Goud	Stock2Track Demo Store	9000100189	07-10-2026	Main Store	2,65,512.00	SELECT
14411	Vidya Gupta	Stock2Track Demo Store	9000100039	13-10-2026	Main Store	80,415.00	SELECT
14410	Yamini Iyer	Stock2Track Demo Store	9000100006	16-10-2026	Main Store	1,04,105.00	SELECT
14409	UNKNOWN UNKNOWN	Stock2Track Demo Store		08-10-2026	Main Store	1,362.50	SELECT
14408	UNKNOWN UNKNOWN	Stock2Track Demo Store		03-10-2026	Main Store	891.50	SELECT
14407	UNKNOWN UNKNOWN	Stock2Track Demo Store		05-10-2026	Main Store	984.50	SELECT
14406	UNKNOWN UNKNOWN	Stock2Track Demo Store		22-09-2026	Main Store	777.00	SELECT
14405	UNKNOWN UNKNOWN	Stock2Track Demo Store		02-10-2026	Main Store	597.50	SELECT
14404	UNKNOWN UNKNOWN	Stock2Track Demo Store		01-10-2026	Main Store	1,322.00	SELECT
14403	UNKNOWN UNKNOWN	Stock2Track Demo Store		18-09-2026	Main Store	756.00	SELECT
14402	UNKNOWN UNKNOWN	Stock2Track Demo Store		22-09-2026	Main Store	462.00	SELECT

Figure 12. Finding the bill

- 1 Search by invoice number, name or phone
- 2 Search

- 3 Select the original bill

STOCK2TRACK

CLASSIC BLUE

8

QUICK INVOICE

+ NEW INVOICE

Returns / Credit Note

Search Invoice

Search by Invoice #, Name, Phone

Q Type to search...

From Date

To Date

Location

Company

Q SEARCH

Invoice #	Customer	Company	Phone	Date	Location	Amount	Action
14415	Bengaluru Trends Pvt Ltd (Demo)	Stock2Track Demo Store	9000200073	03-10-2026	Main Store	41,700.00	CLOSE

Product Name	Qty	Unit Price	Total	Serial #	Action
Double Bedsheet with 2 Pillow Covers	20.00	1,235.00	24,700.00		ADD TO RETURN
Bath Towel - Cotton	40.00	425.00	17,000.00		ADD TO RETURN

14414	Bengaluru Trends Pvt Ltd (Demo)	Stock2Track Demo Store	9000200073	12-10-2026	Main Store	41,700.00	SELECT
14413	Shruti Goud	Stock2Track Demo Store	9000100189	30-09-2026	Main Store	48,305.00	SELECT
14412	Shruti Goud	Stock2Track Demo Store	9000100189	07-10-2026	Main Store	2,65,512.00	SELECT
14411	Vidya Gupta	Stock2Track Demo Store	9000100039	13-10-2026	Main Store	80,415.00	SELECT
14410	Yamini Iyer	Stock2Track Demo Store	9000100006	16-10-2026	Main Store	1,04,105.00	SELECT
14409	UNKNOWN UNKNOWN	Stock2Track Demo Store		08-10-2026	Main Store	1,362.50	SELECT
14408	UNKNOWN UNKNOWN	Stock2Track Demo Store		03-10-2026	Main Store	891.50	SELECT
14407	UNKNOWN UNKNOWN	Stock2Track Demo Store		05-10-2026	Main Store	984.50	SELECT
14406	UNKNOWN UNKNOWN	Stock2Track Demo Store		22-09-2026	Main Store	777.00	SELECT

Figure 13. The items on the bill

1 The items on the original bill

2 Add an item to the return

STOCK2TRACK

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8

QUICK INVOICE

+ NEW INVOICE

Search Invoice

Search by Invoice #, Name, Phone

Type to search...

From Date

To Date

Location

Company

SEARCH

Invoice #	Customer	Company	Phone	Date	Location	Amount	Action
14415	Bengaluru Trends Pvt Ltd (Demo)	Stock2Track Demo Store	9000200073	03-10-2026	Main Store	41,700.00	CLOSE

Product Name	Qty	Unit Price	Total	Serial #	Action
Double Bedsheet with 2 Pillow Covers	20.00	1,235.00	24,700.00		ADD TO RETURN
Bath Towel - Cotton	40.00	425.00	17,000.00		ADD TO RETURN

Return Item Details

Product Name

Double Bedsheet with 2 Pillow Covers

Original Qty

20.00

Available to Return

20.00

Return Qty

20.00

Rate

1,299.00

Discount (proportional)

0.00

SGST

588.10

CGST

588.09

IGST

0.00

Cess

0.00

Refund Amount

24,700.00

ADD

CANCEL

14414	Bengaluru Trends Pvt Ltd (Demo)	Stock2Track Demo Store	9000200073	12-10-2026	Main Store	41,700.00	SELECT
14413	Shruti Goud	Stock2Track Demo Store	9000100189	30-09-2026	Main Store	48,305.00	SELECT
14412	Shruti Goud	Stock2Track Demo Store	9000100189	07-10-2026	Main Store	2,65,512.00	SELECT

Figure 14. How many are coming back

- 1

Return details for the item
- 2

How many are coming back
- 3

Refund for this line, with GST reversed

STOCK2TRACK

CLASSIC BLUE

8

QUICK INVOICE

NEW INVOICE

Product Name	Qty	Unit Price	Total	Serial #	Action
Double Bedsheet with 2 Pillow Covers	20.00	1,235.00	24,700.00		ADD TO RETURN
Bath Towel - Cotton	40.00	425.00	17,000.00		ADD TO RETURN

1

Credit Note Items

Product Name	Qty	Unit Price	Discount	SGST	CGST	IGST	Cess	Refund Amount	Action
Double Bedsheet with 2 Pillow Covers	20.00	1,235.00	0.00	588.10	588.09	0.00	0.00	24,700.00	REMOVE
Total Refund:								24,700.00	

Payment Options

2

3

☒ Pay Now
 ☐ Pay Later (Credit to Account)

4

CASH

CARD

WALLET

CHEQUE

CREDIT NOTE

Cash Refund

24,700.00

Total Allocated:

24,700.00

Remaining Due:

0.00

5

GENERATE CREDIT NOTE

CANCEL

14414	Bengaluru Trends Pvt Ltd (Demo)	Stock2Track Demo Store	9000200073	12-10-2026	Main Store	41,700.00	SELECT
-------	---------------------------------	------------------------	------------	------------	------------	-----------	--------

Figure 15. Refund or credit note

- | | | | |
|---|--|---|------------------------|
| 1 | Items on the credit note | 4 | How the refund is paid |
| 2 | Refund now | 5 | Create the credit note |
| 3 | Or keep it as a credit for the next bill | | |

Before you start

Privilege **Refunds Creation**.

Good to know

- An unpaid credit note shows in the Notifications bell until it is refunded or used.

Quotes and Estimates

Price a list of items for a customer, print or email it, and turn it into an invoice when they agree.

Who	Sales staff	How often	When customers ask for a price
-----	-------------	-----------	--------------------------------

Why it matters

No retyping when the customer says yes — the quote becomes the bill.

How to use it

1. Open **Sales > Quote / Estimate** and press **New Quote**.
2. Choose the customer, add the items and prices, and press **Create Quote**.
3. Open the quote to print it (A4 or 3-inch) or send it by email.
4. When the customer agrees, press **Convert to Invoice**: the billing screen opens with the items.

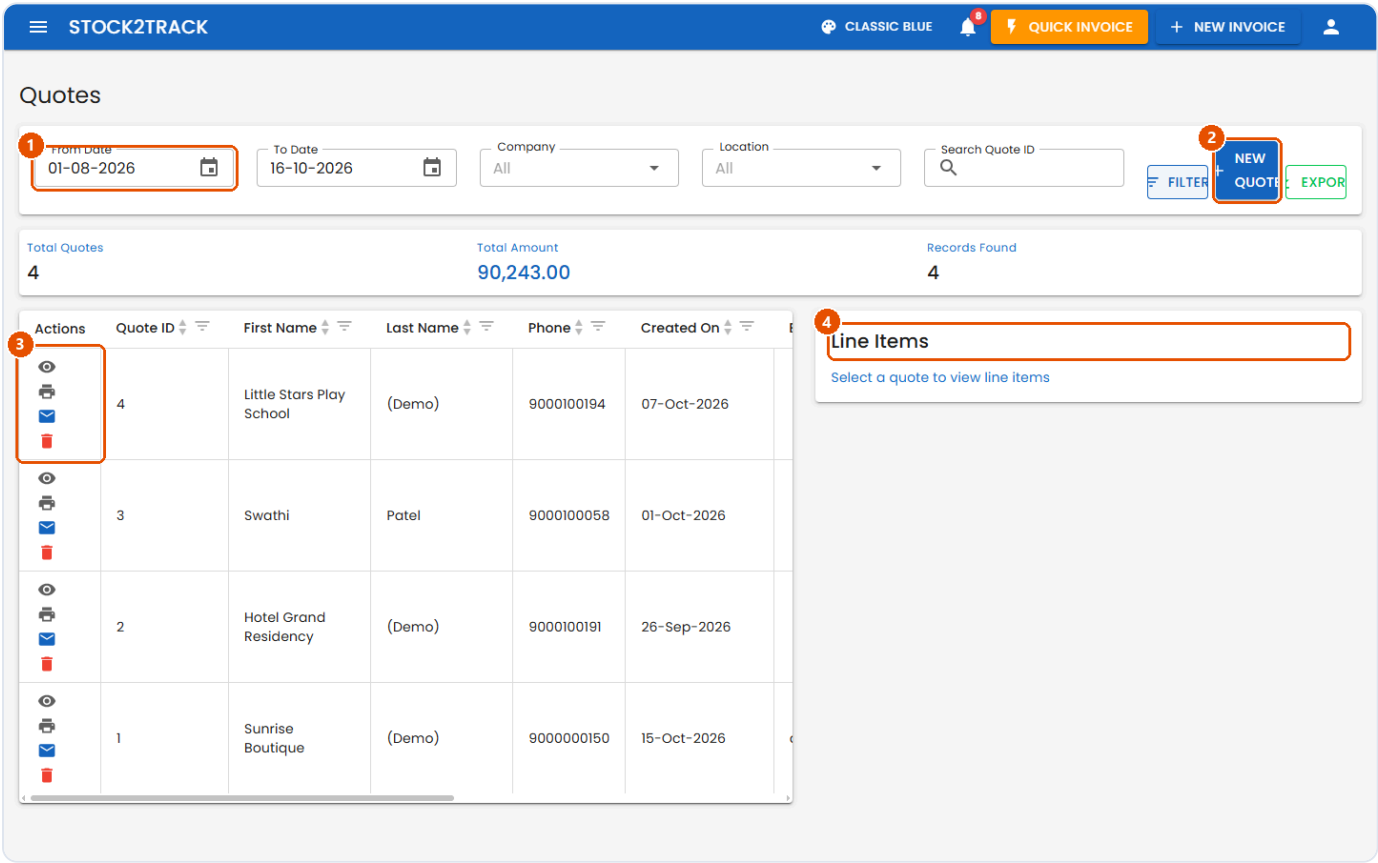


Figure 16. Quote list

- 1

Date range
- 2

New quote
- 3

View, print, email or delete
- 4

Items of the selected quote

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QUICK INVOICE

NEW INVOICE

Create Quote

1

Add Product

Barcode

Scan or type barcode

Product Name

Serial Number

Enter serial number

2

Customer

Phone

Name

Company

Email

GSTIN

Locality

Address

State

-- Select --

Referred By

3

Summary

Subtotal:	0.00
SGST:	0.00
CGST:	0.00
IGST:	0.00
Discount:	0.00
Quote Total:	0.00

4

Additional Info

Tag 1

Tag 2

Location

Main Store

X

Company

Stock2Track Dem...

Rep

-- None --

Quote Date

16-10-2026

CREATE QUOTE

CANCEL

Figure 17. A new quote

1

Add products

2

The customer

3

Quote total with GST

4

Save the quote

Before you start

Privilege **Quote**.

Good to know

- Old quotes that never became sales appear in the Action Queue so you can follow them up.

Delivery Challans

A delivery challan sends goods out (on approval, for a job, or before billing) and reduces stock without making a sale.

Who	Dispatch staff	How often	When goods leave without a bill
-----	----------------	-----------	---------------------------------

Why it matters

Goods out of the shop are always on paper, with stock kept right.

How to use it

1. Open **Sales > Delivery Challan** and press **New**.
2. The DC number fills in. Set the date, add the items, and enter billing and shipping addresses.
3. Press **Create DC**. Stock is reduced. Deleting a challan puts the stock back.

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QUICK INVOICE

NEW INVOICE

Create Delivery Challan

1

Add Product

Barcode

Scan or type barcode

Product Name

Serial Number

Enter serial number

Line Items (0)

Product Name

HSN

MRP

Qty

Disc%

Disc.

SGST

CGST

IGST

Total

No items added yet

2

Billing Details

Unknown

Phone

Name

Company

Email

GSTIN

Locality

Address

State

-- Select --

Referred By

3

Shipping Details

Same as billing address

Name

Company

Phone

Email

GSTIN

State

4

CREATE DC

CANCEL

Summary

Subtotal:

0.00

SGST:

0.00

CGST:

0.00

IGST:

0.00

Discount:

0.00

Grand Total:

0.00

Figure 18. A new delivery challan

- 1

Add the items going out
- 2

Who they are for
- 3

Where they are going
- 4

Create the challan (stock is reduced)

Before you start

Privilege **Delivery Challan**.

Good to know

- A challan does not turn into an invoice by itself: bill the goods separately when the customer keeps them.

Customer Ledger and Collecting Dues

Everything a customer bought, paid and returned, with the balance they owe, and a place to record what they pay.

Who	Owner, accounts	How often	Weekly
-----	-----------------	-----------	--------

Why it matters

Know exactly who owes what before you give more credit, and record collections against the right bills.

How to use it

1. Open a customer's ledger from the customer list or **Finance > Customer Ledger**.
2. Read the totals: invoiced and paid in the period, and the total due for all time.
3. The Invoices, Payments and Credit Notes tabs show every entry.
4. Press **Record Payment**, choose how they paid and, if you like, which invoice it is for.

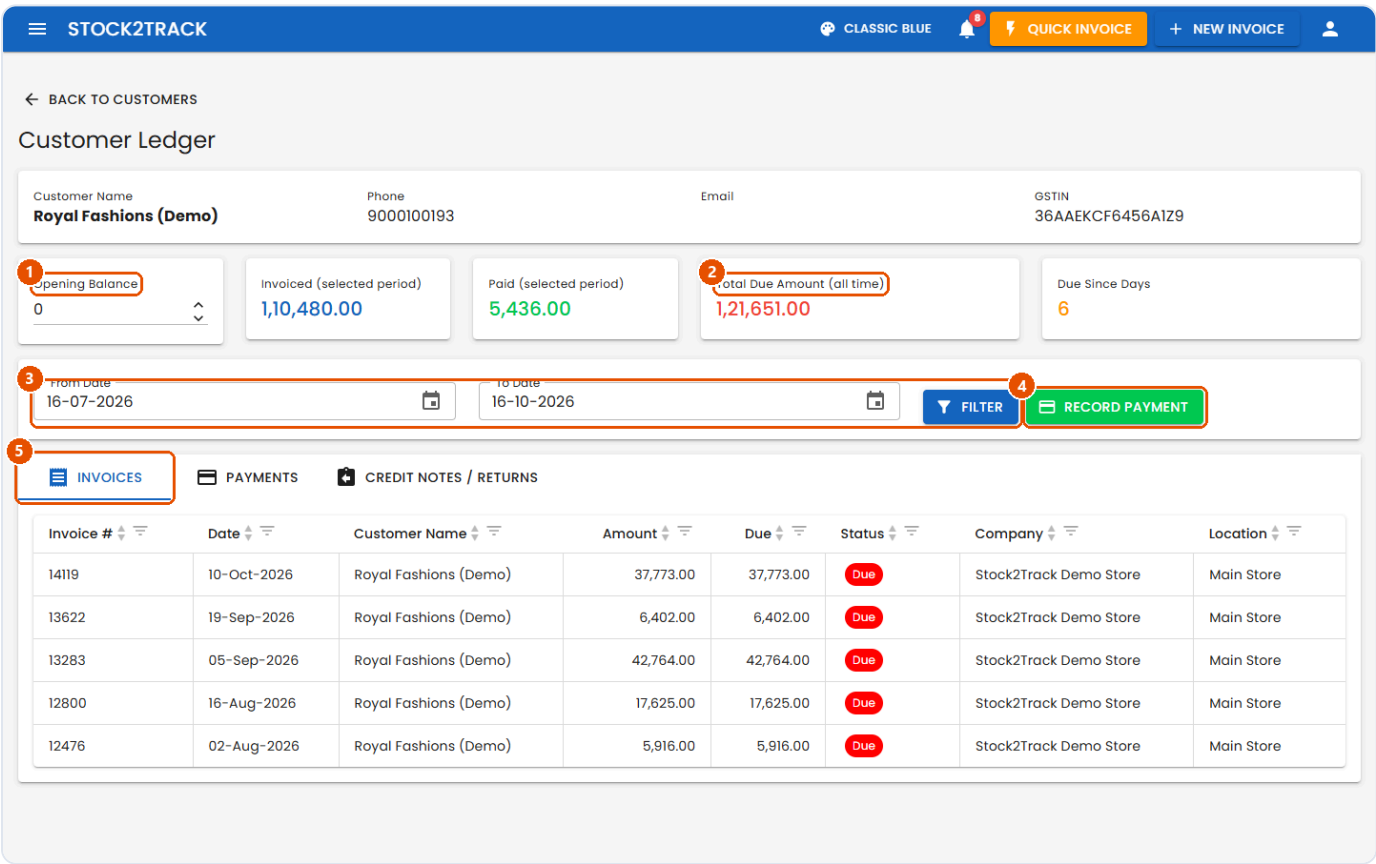


Figure 19. A customer ledger

- 1

Opening balance when you started
- 2

Total owed, all time
- 3

Period for the tabs below
- 4

Record a payment
- 5

Invoices, payments and credit notes

Before you start

Privilege **Customer Ledger**. Enter the customer's opening balance when you start.

Good to know

- Without a chosen invoice, a payment clears the oldest bills first.

Due Payments

All unpaid invoices across customers, oldest first, with a quick way to record a collection.

Who	Accounts	How often	Daily or weekly
-----	----------	-----------	-----------------

Why it matters

One list to chase every rupee owed to you.

How to use it

1. Open **Finance > Due Payments**.
2. Filter by date or customer; the oldest dues are at the top.
3. Press **Record Payment** on the customer, enter the amount, date, **Payment Type** (cash, card, wallet, cheque or bank transfer) and reference, and save. The oldest bills are cleared first.

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QUICK INVOICE

NEW INVOICE

Due Payments

1 search customer

2 Total Outstanding ₹3,39,424.00

Actions	Customer Name	Mobile	Total Due
3 RECORD PAYMENT	Royal Fashions (Demo)	9000100193	1,21,651.00
RECORD PAYMENT	Shruti Goud	9000100189	1,10,080.00
RECORD PAYMENT	Sai Ganesh Traders (Demo)	9000100192	40,564.00
RECORD PAYMENT	Sunrise Boutique (Demo)	9000000150	21,551.00
RECORD PAYMENT	Lakshmi Textiles (Demo)	9000100190	20,663.00
RECORD PAYMENT	Hotel Grand Residency (Demo)	9000100191	13,660.00
RECORD PAYMENT	Anjali Reddy	9000000103	3,273.00
RECORD PAYMENT	Meena Iyer	9000000109	2,182.00
RECORD PAYMENT	Priya Sharma	9000000101	2,008.00
RECORD PAYMENT	Vikram Rao	9000000106	1,313.00
RECORD PAYMENT	Grace Rao	9000100186	1,274.00
RECORD PAYMENT	Gayatri Murthy	9000100187	1,015.00
RECORD PAYMENT	Ramya Sinha	9000100184	160.00
RECORD PAYMENT	Rekha Patel	9000100181	30.00

Figure 20. Due payments

- 1

Find a customer
- 2

Total owed by all customers
- 3

Record what was received

Before you start

Privilege **Customer Ledger**.

Good to know

- To pay a particular invoice rather than the oldest, use Record Payment on the customer ledger.

Coupons

Create discount coupons with an amount, a minimum bill value, a usage limit and validity dates.

Who	Owner, marketing	How often	For each campaign
-----	------------------	-----------	-------------------

Why it matters

Run festival and win-back campaigns that the counter can redeem on any bill.

How to use it

1. Open **Admin > Coupons**. Press **Generate** for a 16-character code, or type your own.
2. Set the **Amount**, the minimum **Bill Value**, how many **Usages** are allowed, and **Valid From / To**. Save.
3. At billing, enter the code in the Coupon tab.

STOCK2TRACK

CLASSIC BLUE

QUICK INVOICE

NEW INVOICE

Coupons

Add New Coupon

Coupon Code

generate

valid from16-10-2026

valid to16-10-2026

Usages

Amount

Bill Value

+ ADD COUPON

DELETE SELECTED

	Coupon	Amount	BillValue	Valid From	Valid To	Usages	Used	Status
☐	DIWALIGIFT2026AB	1000	5000	26-09-2026 00:00:00	22-10-2026 00:00:00	1	0	New
☐	FESTIVE2026DEMOI	500	2500	26-09-2026 00:00:00	19-10-2026 00:00:00	1	0	New

Figure 21. Coupons

- 1

Coupon code
- 2

Generate a random 16-character code
- 3

Valid from and to
- 4

How many times it can be used
- 5

Discount amount and minimum bill value
- 6

Save the coupon

Before you start

Privilege **Coupons**.

Good to know

- Coupons expiring within a week appear in the Notifications bell.

Invoice Report

All invoices for a period with amounts, tax, payments and dues, ready to export.

Who	Owner, accounts	How often	Daily and monthly
-----	-----------------	-----------	-------------------

Why it matters

Your sales register for the accountant, and a quick check that every bill was paid.

How to use it

1. Open **Reports > Sales & Revenue > Invoice Report**.
2. Choose the dates and press **Generate**.
3. Export to Excel for your accountant.

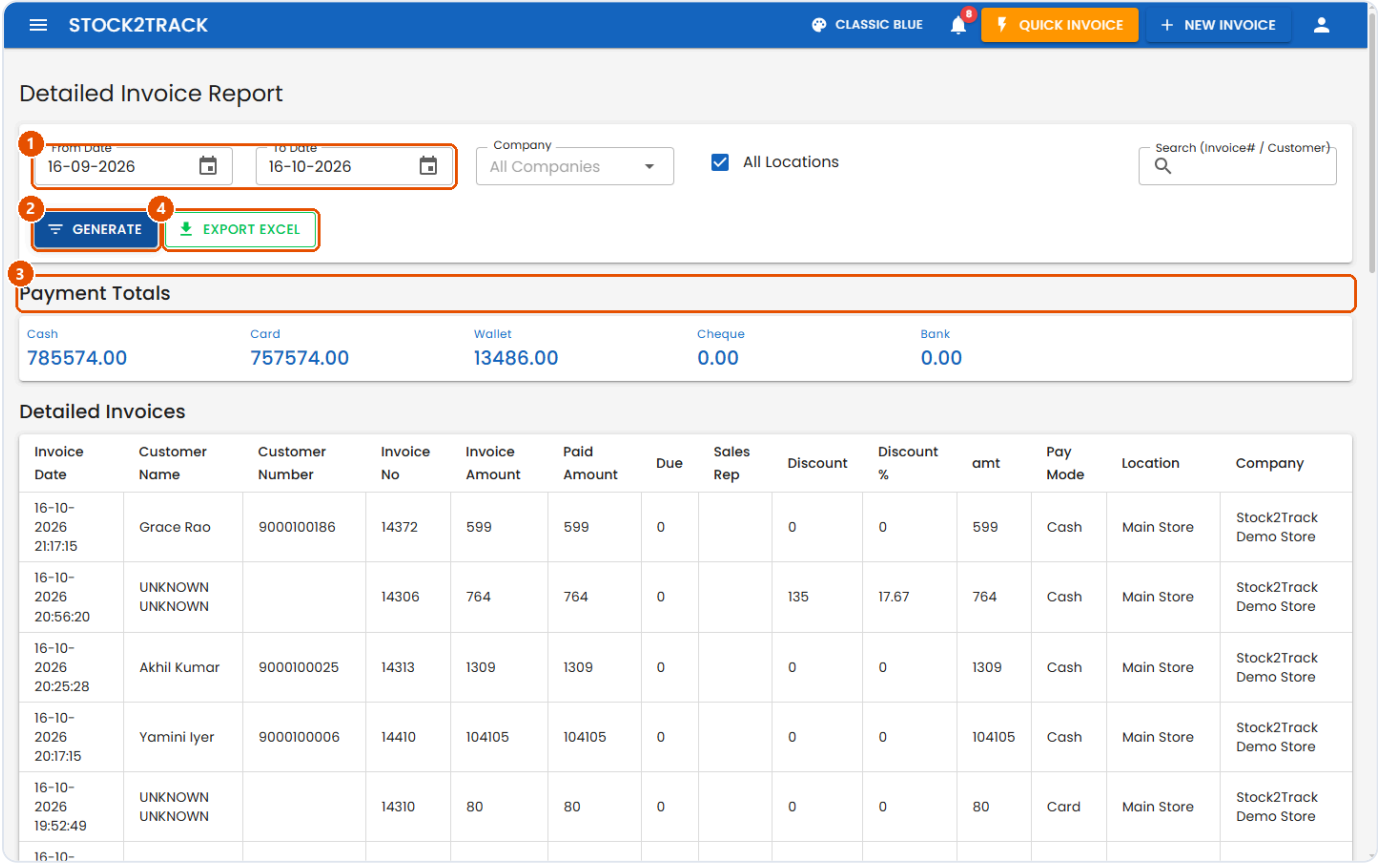


Figure 22. Invoice report

- 1

Date range
- 2

Generate
- 3

Collections by tender
- 4

Export to Excel

Before you start

Privilege **Invoice Report**.

Good to know

- The Refunds Report lists credit notes for the same period.