

Pravag Consulting

[GST Software – Usage Instructions](#)

GST – Software Platform Features

.. focused on ease of use such that anyone who can use email will be comfortable at it

Data Setup activities

- Add/Manage master customer list: Single window for managing all customer/supplier related information including their contact information, PAN/TIN/GSTN numbers, Bank accounts, Contracts, details of individuals from the organizations for your communications
- Add/Manage master list of products: Single interface for managing all products bought/manufactured/sold, buying prices, selling prices, harmonised code, inventory tracking & alerts

Day to day activities

- Operational activities: Raising purchase/customer order, purchase/sales invoice which automatically generates printable pdf for sharing and adjusts inventory
- Payables and Receivables tracking
- Provision to enter payments against invoices which credit/debit bank accounts

Regulatory Needs

- Automated Journal/Ledger creation based on sales and purchase invoices
- One click download of data in GSTR1 and GSTR2 formats for easy monthly filing

Adding a Customer/Supplier

.. both have a similar looking screen and referred to as Third Party

- Click Third Parties -> New Third Party

The screenshot shows a web-based form for adding a new third party. The form is titled "New third party (prospect, customer, supplier)". It includes a search bar at the top left and a navigation menu on the left side. The main form area contains several input fields and dropdown menus. A red oval highlights the top section of the form, which includes the "Third party name" field, the "Alias name (commercial, trademark, ...)" field, and the "Prospect / Customer" and "Supplier" dropdown menus. Another red oval highlights the "GSTIN" field. The form also includes fields for "Customer code" (CUST-17-00008), "Supplier code" (SUPP-17-00009), "Status" (Open), "Address", "Zip Code", "City", "Country" (India (IN)), "State/Province", "E-mail", "Web", "Phone", "Fax", "Prof id 1 (TIN)", "Prof id 2 (PAN)", "Prof id 3 (SRVC TAX)", "Prof id 5", "VAT is used" (Yes), "VAT number" (Check), "Third party type", "Legal form", and "Cancel".

- Enter Name, Customer/Supplier, Address, GSTIN
- Customer and Supplier codes are prepopulated. These are the unique identifiers for this Third party in the system
- A customer can also be a supplier for some other product. A single registration for the Third party will suffice
- To edit an existing customer Select List -> Choose the Third Party -> Click Modify

Adding a Product/Service

.. both have a similar looking screen

- Click Product/Service -> New Product/Service

The screenshot shows the 'New product' form with the following fields and values:

- Ref.:** PROD000007 (circled in red)
- Label:** (empty)
- Status (Sales):** For sale
- Status (Purchases):** For purchase
- Description:** (empty)
- Public URL:** (empty)
- Stock limit for alert:** (empty)
- Desired optimal stock:** (empty)
- Nature:** (dropdown menu)
- Weight:** kg
- Length:** m
- Area:** m²
- Volume:** m³
- Customs code:** (empty)
- Origin country:** (empty)
- Tag/category:** (dropdown menu)
- HSN Code:** (dropdown menu, circled in red)

Note (not visible on invoices, proposals...)

- Product reference is auto populated. It is the unique identifier for a product/service in the system
- Enter Name(Label), whether it is for sale or purchase or both, choose HSN/SAC Code, Selling Price
- To edit an existing product Select List -> Choose the product -> Click Modify

Setting Price for a Product/Service

.. If each customer has a separate price

Selling Price

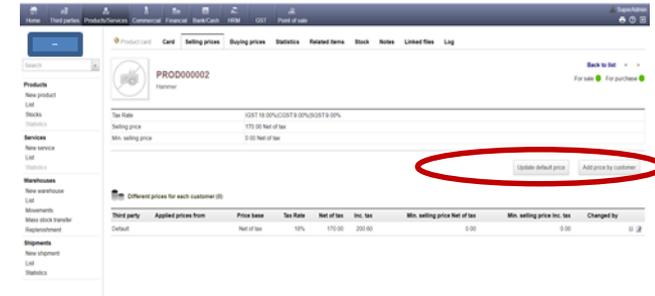
- Click 'Selling Prices' tab for the product



- Click 'Update Default Price'
- Enter price and Save
- Alternatively there are options to set a price per customer where needed. In such cases:
 - Click 'Add price by customer'
 - Choose the customer, enter price for customer and Submit
 - To modify an existing price click 'Edit' icon against the price added

Buying Price

- Click 'Buying Prices' tab for the product



- Click 'Add buying price'
- Choose the supplier, product reference as per supplier's system & nomenclature, minimum qty that can be purchased, price
- To modify an existing price click 'Edit' icon against the price added

Customer Invoice

.. get it done in 2 minutes. In addition allows to track submission and payments.

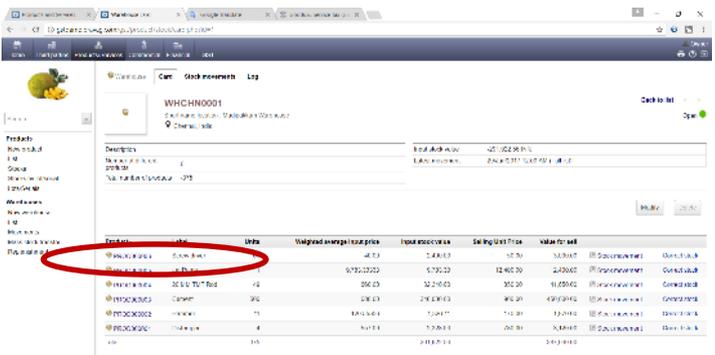
- Click Financial -> New Invoice (under customer invoices)

- Choose Customer, 'Standard Invoice', date of Invoice, Payment terms -> Create Draft

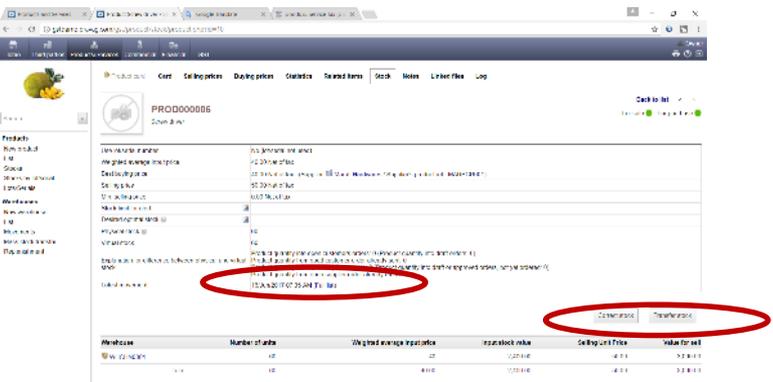
- Select a predefined product being sold, enter quantity -> Add
- Approvers will have a validate button to approve invoice creation. (where applicable warehouse adjustments are done on validation)
- On validation invoice document gets generated and available for download (the drop down has list of invoice templates to choose from)

Manage Stock

.. with ease



- Click Product/Service->Warehouse->List
- Choose the Warehouse
- List of products and their stock positions are displayed as shown in screenshot
- Click product to view the stock movement of the product



- Click 'Full list' to view the full stock movement
- Choose 'Correct Stock' to correct the stock with a manual entry
- Choose 'Transfer stock' to move from one warehouse to another

Thank You