How can I activate license in ZippyFin?

Check your email and then copy the product key sent by Zippy Fin's email address(support@zippyfin.io) eg. XXXX-XXXX-XXXX-XXXX.

Open the ZippyFin **Software** go to **Help > Product Registration** paste the product key and fill the remaining details of your business.

ingini en	u
Product Key	enter product key
Company	enter your Company Name
Contact Person	enter Contact Person Name
Email	enter your Email Id
Mobile (10 digit)	enter your Mobile Number
Address	enter the Address of your company
State	Maharashtra 👻

Press 'Ok'.

Again, go to **Help > Product Registration**, if the license registration is successful then you will get the window like this

💅 Registratio	n Detail
Registration	Detail
Product Key Expiry Date AMC Date	License Details ====================================
	Deactivate License on this machine.

If you didn't get the window as above or Product key box is empty after the license registration, then kindly contact to help desk.

02248025701 or you can send email on support@zippyfin.io

How to create new company/ business books?

To start using ZippyFin software for your business, you need to create a business book to record all your business transactions.

Launch ZippyFin Software.

You will see the following window.

Click on Create New Business Books

🜮 Business Books	×
Select a business to login	
	Create New Business Books
	📑 Restore Data
	Login Cancel

Enter all your business details and click on $\ensuremath{\textbf{Next}}$ button

Enter the details of business					
Business Name					
Print Name					
Books From	01-04-2023 🔍 🖛				
Country	INDIA		\sim		
State			~		
Contact Person					
Address 1					
Address 2					_
City					
Pin Code		Phone			
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Email		Weblink		_	
GSTIN		GST Type	Unregistered V		
PAN		License No.			
License Expiry Date	26-10-2023 ~	Time Zone	Asia/Calcutta	_	
			,		

After clicking on **Next** button, you will see the following window. Select your business type. If your business type is not listed or you are not sure which business type to select, select Inventory Management which is selected by default.

roducts		
elect type of your business:		
Business Type	Description	
Automobile Manager		
Books Shops		
Chemist Management		
Computer Hardware and Accessories		
Crockery		
Dairy		
Electrical Store		
Footwear / Apparel		
Furniture Shops		
Glass Store		
Grain Agent		
Institute Manager		
Inventory Management	Use this if business type is not listed.	
Jeweller		
Kitchen Decor		
Machine Tools		
Mahila Shane		

Click on **Finish** button.

Once a business book is created your Business books Id, Username & Password will be displayed on your screen.

Please note the login credentials for future login.

How to Deduct Taxes During Transactions?

There may be instances where the user wants to deduct taxes during transactions. For example, for a commodity sold in MRP, the GST is already included in the MRP, in this case the user will not require addition of a separate GST% to the final bill amount. The user in ZippyFin can perform tax inclusive transaction or a transaction where the amount should be displayed excluding taxes.

For instance, if in any sale transaction the billing amount is ₹1000, with GST 12% then total bill amount will be ₹1120. However, due to the commodity being sold at MRP or a price including tax already or any other reason, billing can be done as required. In case the user does not want an addition GST to be applied then they can use this feature of the software. In the example given, the total bill amount will be displayed as ₹1000 if "Deduct tax from Amount" option is used.

>>To enable Tax Deduction in Sales, follow the below steps:



Step 1: Go to Transaction > Sale.

Step 2: In the sale frame you can tick checkbox of 'Deduct tax from amount.

🗭 Sale Sale																	-		×
are																			
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Name Or	n Bill Sa	tyam						Mob.No. 8084	6812		C	hange Quar	ntity with	Amount	Use Sel	ling Price	~		
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															Save	Cancel		S <u>a</u> ve & N	lew

Snap 1: Amount displayed Including the Tax

💕 Sale Sale											-		×
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Tax Invoice	~ Dat	e 17-03-2	2022 🗘 (Thu	rsday)	Voucher No	INV-00016FW	Ref. No.						
Ledger	Satyar	n				Bal: 0.00 Dr		Deduct Tax Fr	om Amount	Enable Round Off			
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heb Ch			0.02.23.04	0.00						Save Cance	1	S <u>a</u> ve & N	ew

>>If you want to Use Deduct Tax from Amount in all transaction then you need to enable settings for Deduct Tax from Amount. #

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Sale Analysis Report	Bank Balance:	v	0 Cheques de Details	ue for deposit		0.00 Dr Expenses This Month	
	Task List			My Tickets			
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¥ Supplier	Make Paymer Receipt Due:	nt To Dealer INV-00009FW	Medium Medium				
Inventory Reports							

Step 2: Select Inventory Setting from the list of settings.

Company Master In	ransaction Reports Setup Tools Application Help	
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Step 3: Here the user gets two options relating to tax deduction by default.

Option 1: Check the **'Deduct Tax From Amount By Default (except purchase)'** checkbox in case the user wants to make the tax deduction default in all transactions except purchase.

Option 2: Check the '**Deduct Tax From Amount By Default in Purchase**' checkbox in case the user wants to make the tax deduction default in purchase transactions only.

Company Master Tra	ansaction Reports Setup Tools Application Help	
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Step 4: Click on the "SAVE & CLOSE" button to save the changes and close the settings.

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How to increase the font size for entire columns in Invoice?

"Launch the software, then navigate to Setup > Settings > SALE Print Settings."



Business Master Transaction Reports Setup Tools Application Help

Vew Customer Settings: Image: Save & Close Preview Vew Contact Day Book Setting Ledger Book Setting General Settings: Sate Order Type here to search setting Vactation General Settings: Backup Settings Default Format S8MM - Format 1 Very Challan Backup Settings Sync Settings Default Format S8MM - Format 1 Very Challan Sync Settings Sync Settings Default Format S8MM - Format 1 Sate Register Dayaboard Setting Sync Settings Print Format S8MM - Format 1 Sate Register Department Setting India Mart Setting Sate Process Dashboard Set Default Format Save As New Format Download Template File Print Top Header Company Details LEFT_UPPER Condution Register Sale Print Setting Quotation Print Setting Purchase Print Setting Purchase Return Print Setting Purchase Return Print Setting I Left Top Header Sate Return Print Setting Purchase Return Print Setting Purchase Return Print Setting Middle Top Header	V Customer	🜮 Dashboard 🔞 Settings 🖂
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"In SALE Print Settings, scroll down and click on Item Information Table Font."

Business Master Transaction Re	eports Setup Tools Applicat	ion Help				
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Sale Sale Sale Sale Sale Sale Sale Sale		Mode or Terms of Payment Other References Terms Of Delivery Print Attribute Include Print Attribute Print Child Item Child Item Name in Print Item Information Table Font: Segue UI		Şize rowse	Reset	
Pending Sale Invoices		Print Field	Width In MM	Field Name	Position	Ontions
Sale Process Dashboard		□ S.N.	7	S.N.	20	
Delivery Challan Dashboard		Challan	15	Challan	30	j
Cheque due for deposit		Product Code	15	Part	40]
		Particulars	17	Particulars	50]
		HSN/SAC Code	18	HSN/SAC Code	120]
		Item Manufacturer	22	Manufacturer	130]
🔮 Supplier		M.R.P	18	Item M.R.P	220]
Accounting		Rate	15	Rate	230]
a Inventory		Discount	18	Discount	240	1
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Click on **Browse** to change the font size.

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turer	22	Manufacturer	130	
	18	Item M.R.P	220]
	15	Rate	230	
			240	1

"You can increase the font size by clicking on the Size option."

Customer	🜮 Dashboard 🙆 Setting	js 🖾						
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	UK	Cancel	р		18	Item M.R	.P	220
Accounting					1	-i i		

"Click on **OK**, then check the changes by clicking on **Preview**."

			Bil O Innov	ll of rigina ventry	Supply al Copy Book Depo			
		C	rossroads B State C	humkar ode: 21	r Chowk Pune 41 7-Maharashtra	1023		
Buyer	: Cash		ciate c	Invoi	ce No: BS-00001		Date: 05/09/2024	l.
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S.N. 1	articulars		HSN/S	SAC	Qty	Rate	GST	Amount
1	ill Cover				1 PCS	10.00	18%	11.80

How to create multiple users?

"Launch the Software, click on 'Master', select 'User Accounts', and then choose 'Product User '



"Complete all the required fields and assign a password. "Then click On **Save**.



k s Si		normation							
	Info	Store Users							
	User	Name							
y N istr	Conta	ct							
	First N	Name							tr
_	Middl	e Name							
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-	User	Group	Administrators				~	🗟 New	
	Addre	ess 1							
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irst Name	Ram
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Jser Group	Administrators V 🗋 New
Address 1	
Address 2	
Address 3	
hone	
ах	
Mobile	
mail	
	✓ Enabled

"You can restrict access for your users by assigning specific rights."

In Master Click on Product User Privileges

noventry - Abcd (admin)

ness	Mas	ter	Transacti	on	Reports	Setup	То	ols /	Application	Help	
New	2	Leo	lger					🔁 Pa	yment Link	💥 Close	💥 Close A
Cust	1	Co	ntact				rd	🛓 Pro	duct Users	23	
Vew (4	Ser	n vice								
New (Ser	vice Group	0			=				
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Sale P]	Bar	Code				-				
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Acco		lax	Group				400 900	User	Groups		
Inve		Are	a			>		Prod	uct User Priv	vileges	-
Rep		Mo	ore			>		User	Group Privil	eges	
uct By		Use	er Account	ts		>		Trans	action Statu	is Permissions	
									Contraction of the		>>

"Select the username and grant permission by clicking on the corresponding transaction.

Product User	Ram user	Assign All	Revo	ke All		
ilter [-	1.1			
Name	~	C	Open -	Add	Edit	Delete
Address	Type Operations			1	1	1
Address	Type View		1			
Allow ac	cess to tickets from other users on tracker : Enqu	liry	1			
Allow ac	cess to tickets from other users on tracker : Sale	Lead	1			
Allow ac	cess to tickets from othe <mark>r</mark> users on tracker : Servi	ce Call	1			
API Bala	nce		1			
API Bala	nce Report		1			
API Cons	umption Detail		1			
API Purch	nase Detail			1	×	1
API Purch	nase Detail View		1			
API Setti	ngs		1			
API Type				×	1	1
APIType	View		1			
Applicati	on Resource Operations			1	1	1
Applicati	on User Operations			1	1	1
Applicati	on User Privilege Operations			*	1	1
Attribute	Group Line Operations			1	1	1
Attribute	Group Operations			1	1	1
Attri <mark>b</mark> ute	Group View		1			
Attribute	Line Operations			1	1	1

How to add item with batch?

"Go to the **Master** Menu, click on '**Item**', and select '**New**' to create a new item. After creating the item, please check the box for '**Use Batch No**'.

	Items Image BarCode Stock Detai	s Description Alternate	Unit
Name	Dolo 650		
Print Name			
Product Code		HSN Code	F3 -> Search
Unit	TABLETS		~
Item Group	ANTIBIOTIC ~	Manufacturer	~
M.R.P.		Tax Class	GST12 ~
Purchase Price	%	Landing Price	%
Sale Rate is Based	on M.R.P. OPurchase Price		······································
Selling Price	% 10	Whole Sale Price	% Amount
Retailer Price	% Amount	Rate Code	
Minimum Stock		Maximum Stock	
Opening Rate		Sale Account	Sale Account
Sale Rtn A/c	Sale Account	Purchase Account	Purchase Account
Purchase Rtn A/c	Purchase Account		
Drug Composition			~
Stock Attribute		Item Attribute	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~
		Group	

"Select '**Transaction** ', then click on '**Purchase** 'to create a purchase. Select an item, click on '**Batch**', and select '**New Item Batch**'. You can then create a new batch for the item."

Date 10-Aug - 202	(Saturday) V	oucher No		Ref. No.	P	Apply Reverse C	harge Billing D	ate 10-Au	ıg - 202 ∨	
Mob.No. Name On Bill Cash	Supp	lier Cash	Bal: 5535	.00 Cr			Deduct Tax Change Qui	From Amo antity with	ount 🗹 En h Amount	able Round
Bar Code ALERGIN	Item	ALERGIN	1		PO	GRN	Bat	ch	~]
M.R.P. Quantity Uni	Selling Rate	Disc(%)	Net Rate /	Amount(Exc	Tax) Tax	Tax Amoun	t Total Amount	Current	t Stock: 9.5 STRI	Р
1 ST	RIP ~	0	0		0 GST 12	~ 0	0	Add 📓	Item	
# Product Code	Name	Quantity	Unit	Rate	Discount(%)	Amount	Tax I	Net Rat	Tax Amount	Total Amo

"When you create a new batch, you need to enter the batch number, MRP, selling price, manufacturing date, and expiry date." click on **Save**

	1		
	Create new Iten	n Batch	
rint			
npu	Item	ALERGIN	
er n	Batch No.	10002] [
Ca	M.R.P.	10] [
GIN	Purchase Price	8]
	Landing Price		
_		Rates are calculate on M.R.P Price	
	Selling Price	12	%
	Wholesale Price	11	%
Qu	Retail Price	12	%
-	Rate Code		
	Mfg. Date	10/8/24	
	Expiry Date	10/8/25	
_		Save Cancel	Save & New

Sale	9													2
Info	Payment Detai	s Attach Docu	ments Descr	iption Tran	sport Details									
Bill	of Supply ~ D	ate 10-Aug-	202 (Sat	urday)	Voucher N	o BS-00	006		Ref. No.					
Mob	b.No.		Customer	Cash								T T A		ashla David Off
Nam	ne On Bill Cas	ı			Bal: 5	513.00 C	r					Ourontity with	ount ⊻E	Solling Price
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	1 7	ABLETS ~	12			12		12	GST 12	~ 1.44	13.	44 📝 Add	litem	
#	Product Code	Name	(Quantity	Unit		Rate	Disc	ount(%)	Amoun	t Tax	Net Rat	Tax Amount	Total Amoun

How to share software data for support?

This document is not applicable if you are using Postgres server with ZippyFin. This document is applicable only if you are using a database managed by ZippyFin in the data folder.

- 1. Close the ZippyFin software if already running.
- 2. From the windows explorer, note down the path where ZippyFin software is installed.

↑ C	□ > This PC > Windows (C:) > Innoventry_Offline > Innoventry >							
ж Ф	i e) 🖄 🛈	↑↓ Sort ~	\equiv View $\scriptstyle{\scriptstyle imes}$				
Personal		Name	^	Date mod	dified	Туре	Size	
hments		🚞 cache		08-05-202	24 12:33	File folder		
top	1.1	configuration	_	03-08-202	24 10:47	File folder		
ments		📃 data		02-08-202	24 13:42	File folder		
mento		🔁 drive-tokens	-	11-05-202	24 11:30	File folder		
res		features		22-07-202	24 16:57	File folder		
	-	🚞 jre		22-04-202	20 15:19	File folder		
P	*	🚞 json		02-08-202	24 13:49	File folder		
oads	*	logs		31-07-202	24 14:45	File folder		
		p 2		29-03-202	24 16:45	File folder		
		🚞 plugins		22-07-202	24 16:57	File folder		
shots		iresources		22-07-202	24 16:57	File folder		
511013		🚞 temp		02-08-20	24 13:58	File folder		

3. Inside the ZippyFin installation directory, find and open the data folder.

4. Locate the subfolder for the company you want to share.

5. Right-click on the company's folder and select Send to > Compressed (zipped) folder. A zip file will be created in the same directory.

6. Email the zip folder to us on support@zippyfin.io