

# 1 How do I create voucher number automatically/ manually in purchase transaction?

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Voucher configuration will help the user for speedy transactions. In this guide you will learn how to set invoice number (No) in Zippy Fin Software or voucher numbering in Zippy Fin Software. By default, Zippy Fin Software comes with an invoice or voucher number starting from 1. Here we can understand how to set invoice numbering with prefix and suffix, and how to set invoice number manually.

To open Voucher Configuration view: Go to **Setup > Voucher Configuration > Purchase**

Click on Add button to set voucher number:

**Date From:** Enter the starting date that user wants to generate voucher number from.

**Date to:** Enter the end date that user wants to generate voucher number to.

**Number Start From:** Enter the starting number for the voucher. i.e. Some companies starts invoice numbers from 1, and some prefer 1001 onwards, some chooses 101 etc. We can use 101

**Prefix:** User can enter prefix for the entered voucher number. The prefix can be whatever. We can use INV-

**Suffix:** User can enter suffix for the entered voucher number. suffixes can be a month name or whatever you want.

**Minimum width of voucher number:** User decides how long voucher number he wants, It can be specified in digit.

**Edit Button:** User can edit created voucher number.

**Delete Button:** User can remove created voucher number.

To edit the voucher configuration: Select the configuration > Click on button **Edit**.

How to set the Invoice number manually?

To open Voucher Configuration view: Go to **Setup > Voucher Configuration > Purchase**

And click on the Edit button and select the Voucher Generation Type > Manual.

## 2 How can I configure my Email in Zippy Fin?

You can use the Email feature in the Zippy Fin software to send the required document to the user in a efficient way.

For that you need to configure email setting.

Go to **Setup > Configuration > Email Setting** > tick the **Configure email** check box, Fill the required information

**Name:** enter the name of user.

**Email:** enter the valid email id.

**Email provider:** select the email provider.

**Email:** Enter a valid email id.

**Password:** Enter the password of the email id.

**To send Email:** Go to menu **Tools > Email**.

1. **To:** Enter the email id of customer or press F3 to select contact.
2. **Subject:** Enter the subject of email.
3. **Message:** Enter the message.
4. **Attachment:** Attach the document or file.
5. Then click on **the send** button to send email.

## 3 If current stock becomes overstocked what should the system do?

Go to Setup > configuration > Zippy Fin settings then scroll down the bar, here you can see the question if current stock become overstocked what should the system do?

There are 3 options present you need to select an appropriate option:

1. Show an error and do not allow any transaction for overstock.
2. Show a warning and allow the transaction for overstock.

3. Ignore and allow transaction for overstock.

## 4 Can I send a Promotional SMS using Zippy Fin?

Yes, you can send promotional SMS using Zippy Fin go to Tools > Promotional SMS.

Now SMS dialog get open, select Ledger group (it is mandatory).

Select city, label (if you want to select).

Write text of SMS.

Click on the **OK** button.

## 5 Where can I enter CA's email address?

While creating the company you can fill CA details.

If your company is already created, then click on **Company > Edit Company > Click on Next** button. Now you can see the tab in which you can fill the CA details.

1.**CA Name:** Give name of CA.

2.**CA Email Id:** Give valid Email id of CA.

3.**CA Mobile No.:** Give Valid mobile number of CA.

4.**Accountant Name:** Give the name of Accountant.

5.**Accountant Email Id:** Give valid Email id of Accountant.

6.**Accountant Mobile No.:** Give Valid mobile number of Accountant.

Click on **Finish** button.

## 6 Is auto backup available?

Yes, auto backup is available in Zippy Fin.

Zippy Fin provides by default auto backup option On.

In default Auto backup Zippy Fin take backup of data each time when you close software

## 7 Can any other backup interval option available in Zippy Fin?

**Yes**, there are **5 types of backup interval options** available.

To select auto backup, Click on **Setup** present in top of toolbar ->Configuration->then click on **Backup Setting**.

Then in backup setting there is a field of '**Backup Interval**' in this field 5 option of backup interval is available you can select any one option for backup:

1. **Every Two Hours:** Auto backup will be taken every two hours.
2. **While closing Zippy Fin: When you close Zippy Fin software at that time backup will be taken.**
3. **Daily Once:** Take backup only once a day.
4. **Weekly:** Take backup Weekly.
5. **Fortnightly:** Take backup every two weeks.

## 8 Can I take Auto backup in different folder?

To add auto backup in different folder Click on Setup present in top of toolbar->Configuration->then click on Backup Setting

If Auto backup is Off first, you need to on auto backup for that just click on Auto backup

If auto backup is on, then in right hand side of page you can see the field of 'Another Backup Path'.

To set the backup path click on browse button opposite to 'Another Backup Path' and select the folder where you want to take backup of system.

## 9 Can I send backup by Email?

Yes, you can send backup by email, for that you must have to configure email setting. Go to **Setup > Configuration > Email Setting** > tick the **Configure email check box** and enter the required information of email i.e. username, email address, password of email address

Click on **the OK** button.

To send auto backup by email Click on **Setup** present in top of toolbar->**Configuration**->then click on **Backup Setting**

Now you can see the **Email** field now you need to enter your email id in that field.

Now depend on your backup interval selection Zippy Fin will send the auto backup on email

## 10 Can I include images in Backup?

Yes, you can include images in backup.

To add images in backup. Click on **Setup** present in top of toolbar->**Configuration**->then click on **Backup Setting**.

In right hand side of the page last option is '**Include images in backup**' you need to tick the check box.

## 11 Create A New Tax Group?

To open Tax Group view, go to the menu **Master > Tax Group**. There are some predefined **Tax Groups** available with different Taxes.

To Create new **Tax Group**: Click on toolbar button New

**Name**: Enter the name for the tax group.

**Display Name**: Enter Display Name of this tax Group.

**Description**: Enter any details or descriptions related to the Tax Group.

**Taxes**: Select Taxes that are included in this group.

Press **Apply/Ok** to complete the action.

## 12 How to Create a New Tax Class for Newly Created Tax Group?

To open Tax Class view, go to menu Master > Tax Class There are some predefined Tax Classes available with different Tax List.

To Create a new Tax Class: Click on the toolbar button New.

**Name**: Enter the name for Tax Class.

**Description**: Enter any details or descriptions related to the Tax Class. Click on the **Add** button and add All **Billing Group** and **Bill Classifications** for that new created tax Group

1.**Billing Groups**: select the Billing group.

2.**Billing Classifications**: select the Billing Classifications.

3.**Tax Groups**: select the Some Tax Group you have created.

**Tax List**: Select a Tax List with appropriate Billing Groups, Billing Classifications, and Tax Groups.

Press **Apply/Ok** to complete the action.

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## 14 How do I assigning privileges to users?

You can create users and gives permission to allow specific access to a user.

To give permission to the users, you have to log in as an administrator.

To Assign privileges: Go to **Master > User Account > Product User Privileges**

Select the product user which you want to assign privileges, then select one by one from the privilege list and give permissions to the user.

## 15 Can I change the password of the administrator?

Yes, you can change the password of the administrator.

To change password: Go to menu **Master >User Accounts> Product Users.**

You can see the product user's view. Select the line and click on the Edit button of the top right corner of the software.

You can see the product user frame; in the **Password** and **Confirm Password** field you can change your existing password.

After that click on **OK** button

## 16 How to give sale/purchase privileges to user?

Search the sale and purchase transaction in the privileges list.

Then enable the options (which permission you want to give) "Edit", "Create" or "Delete" after that click on the "Apply" button.

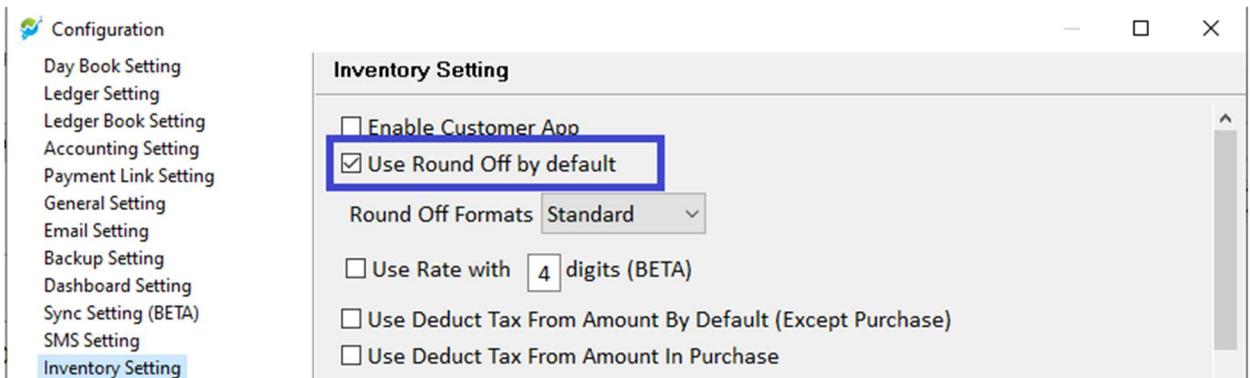
## 17 How to enable/disable round off for all sale and purchase transaction?

To enable or disable round off feature

Go to Setup->Configuration or Press CTRL+F12 from your keyboard.

Go to Inventory Settings. Use Round Off by default option.

Check this option to use round off by default while doing sale/ purchase transactions and vice a versa.



## 18 How to switch to the new financial year? (For Online Version Only)

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**Method 1:** Use the same books for all financial years.

If wish to continue with same books of accounts, you should follow steps:

**Step 1:** In Zippy Fin software login to your company. Go to Setup, Select Working Period.

**Step 2:** Change working period to 1/04/2022 to 31/03/2023 and click on "OK".

**Step 3:** To start voucher numbers from 1 go to Setup, Select Voucher Configuration and create a new voucher configuration for new financial year.

**Step 4:** Select the transaction for which voucher has to be configured. For example, "SALE"

**Step 5:** If there is any pre-existing voucher configuration, make sure that period (Highlighted in Red Color) is edited such that it does not overlap with the new financial year.

**Step 6:** Click on the “Edit” option and then edit the time period. Finally click on “OK” to save.

**Step 7:** After editing the existing voucher, click on the “Add” button to create new voucher configuration. Type in the Prefix, Suffix and Minimum Width of voucher. Click on “OK” to save.

**Step 8:** New voucher configuration is ready and will automatically be used in the Sale Voucher now.

### **Method 2: Create separate books for each financial year**

**Step 1:** Click on “Tools”, select “Import/Export” and then click on “Export financial year end data”.

**Step 2:** Select the new financial year from the drop down list.

**Step 3:** Un-Check the “Create/Update Financial Year Company” and check the “Create data file for manual Import” option. Change name if required and finally click on the “OK” button.

After clicking on OK, it will take some time to process as the system is creating a new file with all existing items with their closing stock as opening stock and ledgers closing balance and their opening balance.

**Step 4:** Copy link using the “Copy Link” button.

**Step 5:** Create a new company.

**Step 6:** Log-in with the new credentials.

**Step 7:** Click on “Tools” option and then select “Import/Export followed by “Import financial year end data”.

**Step 8:** Paste the copied link using “CTRL+V” button and click on the “Import” button

**Step 9:** The new financial year will be created. Now you will be able to work with new company. You can configure new voucher numbers as per your requirement. All existing items in the previous financial year with closing stock are created as opening stock and ledgers with their closing balance as opening balance.

For any query feel free to reach us at [support@zippyfin.io](mailto:support@zippyfin.io)