

MarketFlow - Complete User Guide (point-wise, with examples)

Version 98. For Windows 10/11. First login: admin / admin123 - MarketFlow then asks you to set your own password.

This guide covers every screen. Each one has: what it does, how to use it (step by step), and a real example.

A. FIRST THINGS

A1. Login

- Open MarketFlow. Type your username and password, press Login.
- Example: admin / admin123 (owner). Later add staff with their own logins.
- Change your password any time: "Change password" button above Logout. The owner sets staff logins in Admin > Users (see section S).
- Forgot the password? Click "Forgot password?" on the login window, enter your login name, mobile and shop name. Neotech calls you to confirm, then click "Check reset" - a temporary password is set. Log in and change it.

A2. Dashboard (home screen)

- Shows the day's picture: Today's Sales, This Month, This Year, Total Purchase, Stock Value, Low Stock items, Orders Today, Wholesale Dealers.
- Charts: Monthly Sales, Sales by District.
- Tables: Outstanding by Customer (who owes you), Top Salesmen.
- Quick buttons: New Sale, Quotation, Purchase, Collection, Orders, Delivery, Reports, Accounts - one click to jump there.
- Example: You open MarketFlow in the morning and see "Today's Sales Rs 0, Low Stock Items 4". You click Low Stock to see which 4 items to reorder.

B. SETUP (do these once, before billing)

B1. Settings > Company

- Enter shop name, address, GSTIN, phone, state.
- Add your logo, payment QR (for UPI on bills), and signature image.
- Set thermal-bill extras: FSSAI no, tagline, terms, footer, cashier name.
- Example: "Sharma General Store, Station Road Neemuch, GSTIN 23ABCDE1234F1Z5". This prints on every invoice automatically.
- Until you fill in your shop name, MarketFlow reminds you every time it opens (so no bill ever goes out blank). Your logo and shop name also appear on the left side of the app and in the

title bar.

B2. Load your product list

- Settings > Shop Type: pick your trade (grocery, hardware, medicine...) and load a ready-made product list, OR import your own from Excel (Data I/O).
- Example: A hardware shop loads the Hardware list and gets hundreds of common items with HSN and GST already filled.

B3. Masters (your core lists)

- Customers, Suppliers, Salesmen, Districts, Markets - all added here.
- Example: Add customer "Mega Distributors, Wholesale, mobile 9876543210, GSTIN 23PQRSX...". Now you can bill them.

B4. Opening balances (old dues)

- If a customer already owed you money before using MarketFlow, enter it as their opening balance (Masters > Customer, or Accounts > Customer Ledger).
- Example: Mega Distributors owed Rs 5,000 from before - enter 5,000 as opening balance, so their ledger starts correct.

C. PRODUCTS & STOCK

C1. Products

- Add/edit items: code, name, category, unit, purchase price, selling price, GST%, HSN, barcode, batch/expiry (for medicine), image.
- Example: "AL01, Alovera Juice, PCS, buy 80, sell 100, GST 5%, HSN 2106".
- Opening Stock on this form: the quantity you type when you CREATE a product goes into the Stock Ledger as "Opening" (just like Stock > Opening Stock), and you can change it until the product is used. Once it has any sale or purchase, the box locks - then change stock in Stock > Opening Stock or Damage / Adjust (so old bills stay correct).
- Second name (optional): the same item in another language, e.g. name "सीसीटीवी माइक" and second name "CCTV Mic". The Online Shop shows it under the name, and customers can search in either language. In Excel import use the column "name2" (and "mrp" for MRP). Blank cells in a re-upload never erase barcodes or second names already saved.

C1a. Adding another company's barcode (EAN printed on the pack)

- Open the product (Products > Edit, or Add new).
- Click in the "Barcode (EAN/UPC)" box and scan the pack with your scanner (or type the 13 digits). The scanner's Enter will not close the form - it just moves to the next box. Save.
- From now on, scanning that pack at billing adds this product.
- One barcode can belong to only one product - a duplicate is refused.
- Loose items without a barcode: leave it blank and print MarketFlow's own label from Masters > Barcode Labels (uses the product code).

- Faster way: just scan an unknown pack at billing. MarketFlow asks "Add it as a new product now?" with the barcode already filled in - type the name, price and opening stock, Save, and it goes straight to the cart.
- Example: A new Parle-G pack (8901063010017) arrives. Scan it at the counter, answer Yes, type "Parle-G 100g, Rs 10, MRP 12, stock 50", Save.

C1b. MRP

- Enter the printed MRP in the product form. The thermal bill shows MRP and "Total Savings" (MRP minus your price, plus any discount).

C2. Price Lists

- Give special rates to certain customers or wholesale buyers.
- Customer types: Retail, Wholesale and Distributor (v1.97). A Distributor uses its own Distributor price list; for any item NOT in that list the Wholesale rate is used, so you only fill it where it differs. MarketFlow makes an empty "Distributor" list for you - add items here.
- Example: Retail rate for soap = Rs 40, wholesale = Rs 34, distributor = Rs 32. A distributor billed for an item not in the distributor list gets Rs 34.

C2a. Menus (v1.87)

- Top bar: Dashboard | Sales | Purchase | Inventory | Finance | ...
- Left menu is grouped: HOME, SALES, ORDERS, PURCHASE, STOCK, MONEY, ACCOUNTS, TEAM, REPORTS & ALERTS, SETUP.
- Purchase (Ctrl+Shift+P): Purchase Entry, Purchase History (view, edit, delete, ITC tick), Returns (Debit Note), Suppliers & Payments.
- Stock (F6) shows ONLY stock: Stock Summary, Opening Stock, Damage / Adjust, Stock Ledger, Expiry / Batches. Editing or cancelling a bill is done where the bill lives: Purchase > Purchase History and Sales > Sales History.

C2b. Stock Summary

- Every product with its stock, minimum, value at cost and status (Low / Out of stock / expiring batch). Search, and filter Low / Out / Expiring.

C2c. Opening stock - goods already in the shop

- Stock > Opening Stock: type the quantity in "Add qty" (and Batch / Expiry like 08/2027 if it has one) for each product > Save. The quantity is ADDED to the stock (ledger shows "Opening").
- Many products: "Download sheet (Excel)" -> fill add_qty / batch / expiry in Excel -> "Upload sheet" -> check -> Save. Do not change the code column.

C2d. Batch, manufacturing and expiry dates (medicine, food ...)

- Purchase Entry has a second row: Batch, Mfg, Expiry, or "use within N months". Type dates as printed on the pack: 08/2027 or 31-08-2027. Only Mfg on the pack? Enter Mfg + months (e.g. 01/2026 + 18 months).
- Leave them blank for goods that do not expire.
- Every purchase makes its own batch. MarketFlow counts the oldest (earliest expiry) goods as sold first, so Stock > Expiry / Batches always shows what is really left of each batch - even after cancelled, edited or returned bills.

C3. Stock (Purchase Entry)

- Record goods you buy from suppliers - this ADDS to stock.
- Steps: Purchase > Purchase Entry > pick supplier, bill no, add items with qty and rate > Save. Stock goes up automatically.
- Example: Buy 100 Aloe vera from "ABC Suppliers" at Rs 80 - stock rises by 100, and ABC's payable shows Rs 8,000.
- Paid now? Fill "Paid now" (see S4).

C3a. Edit a purchase or a sale

- Purchase: Purchase > Purchase History > select > "Edit Purchase". Change qty / rate / GST, add or remove items, supplier name or bill no > Save. Only the DIFFERENCE goes into stock. You cannot lower a quantity below what is still in stock (the rest was sold) - use a Return / Adjust entry for that.
- Sale: Sales > Sales History > select > "Edit Sale". Same invoice number; stock and the customer's balance are worked out again. Not allowed for a cancelled bill, a bill with a return or challan, or when the new total is less than the money already received.
- Stock Ledger shows every change as "Purchase-Edit" / "Sale-Edit".
- Example: bill INV...016 had 5 bags; the customer takes 3 more. Edit Sale -> 8 bags -> Save: stock drops by 3 and the bill total goes up.

C4. Delete a Purchase

- Purchase > Purchase History: pick the purchase > Delete Purchase.
- Stock goes back out. Blocked if the goods are already sold, or if the bill has a Debit Note (goods returned - see S5).
- Example: Wrong purchase of 100 units entered - delete it, stock drops back by 100, ledger corrected. Ledger shows "Cancel purchase".

C4a. Cancel a Sale

- Sales > Sales History: pick an invoice > Cancel Sale > give a reason.
- The sold stock comes back in, any cash/UPI taken is reversed, and the bill stays in the list marked "Cancelled" (kept for GST records).
- Stock Ledger shows it as "Cancel Sale" with ref "Cancel sale INV...", just like "Cancel purchase" for a deleted purchase.

C5. Serial / Warranty

- For electronics: track each piece by serial/IMEI and its warranty.
- Example: Sell a mobile with IMEI 3556...; later type the IMEI to see its sale date and warranty end.

C6. Manufacturing (BOM)

- For makers/industries: set a recipe (Bill of Materials), run production, raw material becomes finished goods.
 - Example: 1 bottle of juice = 900ml pulp + 1 bottle + 1 cap. Produce 50 - raw materials drop, 50 finished bottles added to stock.
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D. SELLING

D1. New Sale (billing / POS)

- The main counter screen.
- Steps:
 1. Pick Customer Type (Retail/Wholesale/Distributor) and the Customer. (Salesman is optional - "Direct" is picked for you if none.)
 2. Scan a barcode, OR type the product name and press Enter.
 3. When you select a product, its STOCK shows big and clear (green = enough, orange = low, red = out).
 4. Set Qty, check Rate/Disc/GST, click + Add Item.
 5. Repeat for more items. Edit any line in the cart if needed.
 6. Enter Paid amount and choose Mode: Cash / UPI / Card / Bank / Cheque.
 7. Save Invoice. Then Print A4, Print Thermal, or send on WhatsApp.
- Walk-in buyer? "Cash Customer" is already selected at the top of the list - just scan and bill, no name needed.
- Round-off: the bill total is rounded to the nearest rupee (Rs 104.58 becomes Rs 105; the bill shows "Round Off +0.42"). Turn it off in Settings > Company if you do not want it.
- Hold Bill / Recall: a customer forgot something? Click Hold Bill, serve the next customer, then Recall to finish the first bill. (Held bills stay only while MarketFlow is open.)
- Example: Sell 10 Aloe vera to Mega Distributors at Rs 100, GST 5% - total Rs 1,050. Customer pays Rs 1,050 by UPI. You choose Mode = UPI, Save, print thermal bill. That Rs 1,050 shows in the Bank Book.

D1a. Fast counter billing (keyboard)

- F2: cursor jumps to the Search/Scan box (from any screen).
- Type 2+ letters: a list pops up showing name | code | price | stock. Arrow down to the item and press Enter (or click it) - it is added.
- Quantity first: type *3cem (or 3xcem) and pick - adds 3. Works with barcodes too:*
58901063010017 + Enter adds 5.
- Scanning a barcode adds 1 at once; the same item again only raises its qty - one line per item (also when you use + Add Item).
- In the cart: + / - change the qty of the selected line, Delete removes it.
- F9 customer, F10 paid box, F11 paid = full bill, Ctrl+S (or Ctrl+Enter) saves, Ctrl+B hold bill, Ctrl+R recall, Esc clears the search box.
- Text size: "Text size" box at the top (Normal / Large / Extra Large / Huge) or Ctrl + and Ctrl -. MarketFlow remembers it on this PC.
- "Shortcuts (?)" button shows this list on screen.

D1b. UPI payment at the counter

- Put your UPI ID once in Settings > Company (e.g. yourshop@okicici).
- While billing press "UPI QR" (or Ctrl+U): a big QR with the exact bill amount appears. The customer scans it with GPay / PhonePe / Paytm.
- Check the credit in YOUR UPI / bank app, then press "Received": Paid is filled and Mode becomes UPI. Save the bill as usual.

- Part cash + part UPI: save the bill with the cash part, then record the UPI part in Collection (one payment mode per bill keeps books right).
- The A4 bill also prints a UPI QR for the balance due.
- Card / net-banking gateways (Razorpay etc.) are not included - they need a merchant account; ask Neotech if you want one connected.

D2. Selling to a distributor directly (no salesman)

- Just leave Salesman as "Direct" and bill normally.
- Example: You supply a distributor in bulk yourself - no salesman involved. Bill shows salesman "Direct" in reports.

D3. Sales History + Cancel a Sale

- Sales History lists every invoice with its Status (Active/Cancelled).
- Print invoice, print thermal receipt, send WhatsApp, make e-invoice.
- Edit Sale (see C3a) and Cancel Sale: pick an invoice > Cancel Sale > confirm.
 - Stock goes back in.
 - Any money taken is reversed (removed from cash/bank book).
 - The bill stays in the list, marked "Cancelled" (kept for records).
- Example: You billed the wrong customer and even printed it. Select that invoice, Cancel Sale, reason "wrong entry". Stock returns, if it was paid the cash is reversed, and the bill shows grey "Cancelled".
- Note: unpaid bill? Cancelling also clears the false due on that customer.
- Reprinting a cancelled bill prints a big "CANCELLED" stamp across it.

D4. Quotation

- Give a price quote before a sale; convert to a real bill in one click.
- Example: Quote 200 bottles at Rs 95 to a new buyer. They agree - open the quotation, Convert to Sale, and the invoice is made instantly.

D5. Recurring / Subscription invoices

- For customers you bill on a repeat cycle (weekly/monthly).
- Example: A canteen takes the same 50 bottles every month. Set a monthly recurring invoice - MarketFlow reminds you (or generates it) each cycle.

D6. Orders

- Salesmen's orders come here (from the phone order screen). You review and dispatch; dispatch cuts stock and raises the bill.
- Example: Salesman Anshu sends an order for 30 bottles from the field. You see it under Orders, click Dispatch - stock drops, invoice is made.
- Automatic: MarketFlow checks for new salesman and Online Shop orders every 60 seconds by itself (change it in Settings > Online Shop; 0 = off). When orders arrive you hear a beep and see a "New orders" notice; billing is never interrupted. If two counters share one database, keep this ON at only ONE counter.

D7. Delivery (Challan / E-way)

- Make delivery challans, e-way bills, assign vehicles and drivers.

- Example: A Rs 60,000 dispatch needs an e-way bill - create it here with vehicle no and driver, print the challan.

D8. Returns / Credit Notes

- Handle goods a customer returns; make a credit note.
 - Example: Customer returns 5 damaged bottles. Make a sales return - stock comes back, and Rs 500 is credited against their dues.
 - Goods going back to a SUPPLIER are different - see S5 (Debit Note).
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E. MONEY IN & OUT

E1. Collection (money received)

- Record payments customers make against their bills.
- Steps: Collection > pick customer > amount > mode (Cash/UPI/...) > Save. A receipt number is made; the oldest unpaid bill is settled first.
- Example: Mega Distributors pays Rs 3,000 by UPI toward old bills. Enter it; their outstanding drops by 3,000 and the Bank Book shows +3,000.

E2. Cheques

- Track cheques received - pending, cleared, or bounced.
- Example: A Rs 10,000 cheque is received; mark it Cleared when the bank credits it, or Bounced if it fails (money is reversed).

E3. Outstanding

- See exactly who owes you and how much, oldest first.
- Example: Filter customers with dues over 30 days - three shops owe Rs 12,000 total. Use this before sending reminders.

E4. Expenses

- Record shop expenses by head (rent, salary, electricity, transport...).
 - Example: Pay Rs 4,000 shop rent - enter under "Rent". It shows in the Cash Book (money out) and in Profit & Loss.
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F. ACCOUNTS (Accounts page - 11 views, each with Print/PDF)

F1. Customer Ledger

- Every customer's full account: bills (debit), payments (credit), balance.
- Example: Open Mega Distributors - see all invoices and payments, closing balance Rs 2,000 due.

F2. Supplier Ledger

- Same for suppliers: your purchases (credit), your payments (debit) and Debit Notes (goods returned).
- Example: ABC Suppliers - you owe Rs 8,000. Pay Supplier button records payment.

F3. Cash Book

- All cash movements: cash received in, cash paid out (expenses and supplier payments), closing cash.
- Example: Today cash sales Rs 5,000 in, rent Rs 4,000 out - closing cash Rs 1,000.

F4. Bank Book

- Same but for Bank/UPI/Cheque/Card money only.
- Example: UPI sales Rs 3,000 and a Rs 10,000 cheque cleared show here.

F5. Day Book

- Everything that happened on a chosen day - sales, collections, expenses.
- Example: Pick yesterday - see 12 bills, 4 collections, 2 expenses at a glance.

F6. Trial Balance

- All account balances in one list; debits must equal credits.
- Example: A quick health-check that the books tally before month-end.

F7. Balance Sheet

- Assets (cash, stock, customers owe) vs Liabilities (you owe) + Capital.
- Example: See total worth of the business on a date.

F8. Profit & Loss

- Sales minus cost of goods minus expenses = net profit.
- Example: This month sales Rs 2,00,000, cost Rs 1,40,000, expenses Rs 30,000 - net profit Rs 30,000.

F9. Journal

- Manual accounting entries for adjustments.
- Example: Write off Rs 500 bad debt with a journal entry.

F10. Chart of Accounts

- The list of all account heads (assets, income, expenses...).

F11. Vouchers

- Printable receipt/payment/journal vouchers.
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G. REPORTS

G1. Reports (40+)

- Sales by district/salesman/customer, purchases, stock, GST returns (GSTR-1, GSTR-3B), outstanding, collections, ITC Summary, Purchase Register, and more.
- Every report can be filtered by date and printed/exported.
- Example: GSTR-1 for last month - hand it to your accountant or upload the figures to the GST portal.

H. TEAM & STAFF

H1. Targets

- Set monthly sales targets per salesman and track progress.
- Example: Anshu's target Rs 1,00,000; report shows he did Rs 82,000 (82%).

H2. Payroll

- Salary structure and monthly payroll runs for staff.
- Example: Run March payroll - salaries computed, payslips ready.

H3. Incentives

- Reward schemes for salesmen (e.g. % on sales over target).
- Example: 2% incentive above target - Anshu earns Rs 1,640 this month.

I. REMINDERS & ALERTS

I1. Alerts / Notifications

- Warnings the app raises: low stock, items near expiry, big dues.
- Example: "4 items low on stock", "2 medicines expire in 30 days".

I2. Reminders (WhatsApp payment reminders)

- The app builds a list of shops overdue by N days with a ready message. You tick who to message and click Send. Nothing is sent silently.
- Steps: Reminders > set days (e.g. 7) > the list appears > edit the Hindi/ English template if you like > tick shops > Send to Ticked Shops.
- Example: Three shops overdue by 10+ days. You tick all three, the message "Dear {shop}, Rs {balance} pending against invoice {invoice}..." goes out on WhatsApp. Same shop is never messaged twice the same day.

I2a. WhatsApp - three ways (Settings > Messaging > "How to send")

- WhatsApp link (wa.me) - free: WhatsApp opens with the message ready, you press Send. Nothing to set up.
- Third-party gateway: fill the URL / key your provider gives.

- Meta WhatsApp Cloud API (official, automatic): fill Phone number ID, permanent access token, and an approved template name + language. Create a UTILITY template with body "Message from {{1}}: {{2}}". Without a template Meta delivers only to customers who wrote to you in the last 24 hours. "Send Test Message" checks the setup.

13. Team Reminders

- Ready WhatsApp templates for your staff (salesman/storekeeper duties).
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J. TOOLS

J1. Data I/O (import / export / Fresh Start) - owner only

- Import customers/products from Excel; export data; and Fresh Start.
- Fresh Start: one button erases ALL demo/business data (products, customers, sales, stock...) but keeps units, HSN and districts, so you begin blank for a real shop. It makes a backup first.
- Example: Done testing - click Fresh Start, confirm, and the shop is empty and ready for real data. (Do NOT do this once you have real data.)

J2. Settings

- Company details, messaging, thermal-bill options, online shop. License, Messaging, Cloud Sync, Updates, AI Bill Scan, Year-End and Backup / Restore are shown to the owner only.

J2a. Automatic daily backup

- MarketFlow saves a COMPLETE copy of your data once every day - when it opens and again when it closes - in: Documents > MarketFlow Backups (one file per day, e.g. marketflow_20260926.db). The last 30 days are kept; older ones are removed automatically.
- Settings > Backup / Restore shows the folder. "Open backup folder", "Change folder..." (e.g. a pen-drive or a Google Drive folder), "Backup Now".
- To restore: select a backup in the list > "Restore selected backup". A safety copy of the current data is made first; MarketFlow then closes - open it again.
- Once a week copy the backup folder to a pen-drive or Google Drive, in case the computer itself is lost or damaged.

J2b. Working on another PC (shop <-> home)

- On the PC with the latest work: Settings > Backup / Restore > "Take data to another PC (Export)". Save the one file to a pen-drive, Google Drive, or WhatsApp it to yourself.
- On the other PC (MarketFlow installed there too): "Bring data from another PC (Import)" > pick that file > check the details shown (shop, number of bills, last change) > Yes. MarketFlow closes; open it again and continue exactly where you left off.
- Coming back: do the same in reverse.
- Rules: work on ONE PC at a time - importing REPLACES the data on that PC, it does not merge. If the PC you are importing into has NEWER work, MarketFlow warns you before replacing it. A safety copy is always kept.
- Each PC keeps its OWN licence key - importing never removes it. The home PC needs its own key (or runs its trial).

- Example: Evening at the shop - Export to Google Drive. At home - Import, enter purchases and check reports. Next morning at home - Export; at the shop - Import, and billing continues.

J3. Admin

- Owner-only tools: users, roles, audit log (see section S).
- Licence: Settings/Admin > License > copy Machine ID > send to us > paste the key you get > Activate. One key works on one PC.
- New key format (v1.98): MF4-... . Old MF-... keys keep working until 31-03-2027; ask Neotech for your new MF4 key before that date.
- Trial: a new install runs 10 days with everything open. Reinstalling, deleting data or moving the PC date back does not restart the trial.
- Licence terms: Settings > License > "View Licence Terms (EULA)".

M. ONLINE SHOP (optional) - customers order from their phone

- TWO pages, same shop (v1.98): the app page and the classic page show the same products, prices and stock and save orders the same way. Try both on your phone and share the one your customers like (Links & QR shows both).
- The page shows a search box, category chips, a category rail on the left, a "Best offers" row (biggest % off MRP) and all your products with a price as cards (name, Hindi name, price, MRP struck through, ADD button). Items with price 0 are not shown.
- Stock: with "Show stock quantity to customers" ON, items with stock 0 show "out of stock" and cannot be ordered. Turn it OFF if you do not keep stock counts (cloth, hardware...): then every item can be ordered.
- UPI: if your UPI ID is set and "Customers can pay by UPI" is ticked (Settings > Online Shop), the customer can choose "UPI now", tap the pay button (opens GPay / PhonePe with the amount) and type the UTR number. The order on your PC then says "PAID BY UPI UTR ... - check your bank". Always confirm the money in your bank before billing.
- Your own web page where customers pick items and send an order. It is OFF until you turn it on. If you never turn it on, nothing changes.
- Needs Cloud Sync set up (URL, Client ID, API Key from Neotech).
- Turn on: Settings > Online Shop > tick "Turn ON the Online Shop" > fill tagline, WhatsApp number, Home delivery / Pickup, minimum order > "Save + Publish to website".
- Share: "Copy link" and paste it in WhatsApp groups/status, or "Save QR code", print it and paste it at your counter.
- Customer type: the buyer chooses "Aam grahak" (B2C, for home) or "Dukandar / Vyapari" (B2B). A B2B buyer also gives the shop/firm name and GSTIN (checked for the correct 15-character format). B2B buyers are added to Customers as WHOLESale with their GSTIN, and

their order uses your Wholesale price list / quantity slabs. You can switch B2B off with "Allow shopkeepers / businesses (B2B) to order".

- The customer sees your products by category with prices, uses - 1 + to set quantity, taps "Order karein", then enters name, mobile and address and sends. They get an order number and a WhatsApp button.
- New orders arrive by themselves every 60 seconds (or click "Get new online orders now"). Orders appear under Orders as PENDING with the address and note. A new buyer is added to Customers automatically; next time the same mobile is recognised.
- Check stock, call the customer if needed, then Dispatch - the bill is made and stock is cut exactly like any other order.
- Prices or products changed? Click "Save + Publish" again.
- Example: Suresh (9826012345) orders 2 bags of atta for home delivery at 8 pm. Next morning you click "Get new online orders", see his order, Dispatch it, and send the bill on WhatsApp.
- Safe: customers never see your other customers, prices cannot be changed from the phone, out-of-stock items cannot be ordered, and repeated spam orders are blocked.

N. SALESMAN PHONE PAGE - ORDERS and MONEY COLLECTED (B2C / B2B)

- Each salesman keeps his own link (Orders > Links & QR). On the phone it now looks like the Online Shop.
- Step 1 - Customer: search by name or mobile. Each shows B2C (retail) or B2B (shop / firm, with GSTIN). New customer? "+ Naya grahak jodein": choose B2C or B2B, enter name, mobile, address (firm + GSTIN for B2B). If that mobile already exists, it offers the existing customer instead.
- Step 2 - Products: pick a category or search, set - qty +, "Jodein".
- Step 3 - Review and "Order bhejein". Your price-list rate is applied on the PC. No network? The order stays on the phone - press Send again.
- "My orders" on the phone updates itself every 60 seconds (Pending / Office ne liya).
- On your PC the order comes in by itself within a minute; a new customer is created automatically - B2B as Wholesale with GSTIN, B2C as Retail.
- The page has 3 tabs: "Order book karein", "Paisa jama" and "Meri entry".

N1. Money the salesman collects

- Tab "Paisa jama": pick the shop (its balance due shows), type the amount, choose UPI QR, Cash, Cheque, Net Banking or e-RUPI (details in S2), optional bill number and note > "Paisa jama bhejein" > confirm.
- On your PC it arrives within a minute on the Collection page under "Money collected by salesmen" - NOTHING is booked yet.
- When the salesman hands over the cash (or you see the UPI credit, or you have the cheque), select the line > "Accept selected": Cash / UPI -> a receipt is made and the shop's oldest

bills are settled Cheque -> goes to Cheques as Pending; mark it Cleared when the bank credits it (only then the due goes down)

- Wrong or not received? "Reject selected" with a reason - nothing booked.
- The salesman sees each entry as Pending / Office ne liya on his phone.
- Example: Ramesh collects Rs 1,500 cash and a Rs 2,000 cheque from Sharma Hardware. Evening: he gives you the cash and cheque, you Accept both - the cash settles Rs 1,500 at once; the cheque waits in Cheques.
- Products, prices and stock on the phone pages are re-published by MarketFlow every 15 minutes and right after new orders arrive.

P. LINKS & QR CODES (Orders > "Links & QR")

- Customer link: ONE link / QR for ALL your customers - shopkeepers (B2B) and direct buyers (B2C) both use it and choose B2B/B2C on the page. Print the QR at the counter, on bills, share on WhatsApp status/groups.
- Two customer links (v1.98): the app page (.../app/#/shop/...) and the same shop as a classic page (.../shop.php?c=...). Same products, prices and orders - keep and share the one that works best for your customers.
- Owner portal: a PRIVATE link for your phone - today's sales, collection, dues, stock value, low stock, alerts, salesman targets and orders still waiting for your PC. MarketFlow refreshes it every 15 minutes.
- Salesman links: ONE personal link / QR for each salesman (Copy, QR, WhatsApp and Reset buttons on each row).
- "Save ALL QR codes to a folder" makes printable cards for the customer QR and every salesman.

Q. LICENCE ONLINE (new, renew, more modules)

- Settings > License > "Get / renew licence ONLINE": fill shop name, owner, mobile, city, choose Package (Basic / Standard / Standard + GST / Premium) and Validity (1 month ... 3 years / Lifetime) > "Send licence request". Your Machine ID goes with it automatically.
- Neotech calls you, approves it, and can also create your online account (for Online Shop, salesman links, owner portal) at the same time.
- Next time MarketFlow opens it downloads everything by itself - or press "Check / Download licence + online login". It fills in:
 - the licence key (activated for THIS PC only), and
 - Cloud Sync: Client ID + API Key (your online login).
- Renewal: send a new request before the expiry date shown in Settings > License.
- Example: Sharma Kirana sends a request for Premium, 1 Year. After the call, MarketFlow shows "Licence activated - valid till 26-09-2027. Online login saved: Client ID SHOP003".

R. UPDATES (new versions and fixes)

- MarketFlow checks for updates once a day by itself (Settings > Updates, or press "Check for updates now").
- When a new version appears it tells you what is new. Press Yes: your data is backed up, the update downloads, installs quietly, and MarketFlow opens again in about a minute.
- Every update is digitally signed by Neotech. A damaged or fake file is refused - nothing gets installed.
- Your data (Documents) is never changed by an update, and your licence key stays.
- No internet? Neotech can give you the new MarketFlow_Setup.exe on a pen-drive or WhatsApp - close MarketFlow and run it. Same result.

S. USERS, PERMISSIONS AND PASSWORDS (v1.90)

- Roles: Admin (the owner - everything), Manager, Accountant, Salesman. Admin > Users: add a user, choose the role, set a temporary password.

What each role may do:

Work	Manager	Accountant	Salesman
New bill	yes	-	-
Edit / cancel a bill	yes	-	-
Enter a purchase	yes	-	-
Edit / delete a purchase	yes	-	-
Opening stock / damage / adjust	yes	-	-
Receipts / accept field collections	yes	yes	- (link)
Enter expenses	yes	yes	-
Backup / restore / import / export	-	-	-
Licence, keys, year-end, updates	-	-	-
Total sales / dues on the Dashboard	yes	yes	-

Buttons a role may not use are hidden, and MarketFlow also refuses the action itself. An unknown role sees only the Dashboard.

- Passwords: at least 8 characters, letters and numbers. A new user (and anyone given a temporary password, and "admin123") must set his own password at the first login. Everyone can change his password with the "Change password" button above Logout.
- 5 wrong passwords lock that login for 10 minutes ("Forgot password?" still works).
- Screen lock: after 15 idle minutes MarketFlow asks for the password again. Change it in Admin > Users ("Lock the screen after", 0 = never).
- There must always be one active Admin - MarketFlow will not let you remove, demote or switch off the last one.

- Everything important is in Admin > Audit Log: bills, purchases, payments, stock, expenses, journals, product prices, setting changes, logins, and backup / restore / import / export (these are also written to security_log.txt next to the database).

S1. Salesman links (v1.90)

- Each salesman's link / QR is PERSONAL and does not contain your shop key. It opens only his order page, and he can send orders / payments only in his own name.
- Lost phone or salesman left: Orders > Links & QR > "Reset" on his row - the old link stops at once; send the new one. Switching a salesman off (Masters > Salesmen) also stops his link.
- Links made before v1.90 no longer work - send everyone the new link.

S2. Money collected by the salesman (v1.91)

- A salesman takes money ONLY on his phone link (tab "Paisa jama"). On the PC he can neither enter nor accept a payment.
- Ways: UPI QR, Cash, Cheque, Net Banking, e-RUPI.
 - UPI QR: the amount is filled with the shop's due (can be changed) -> "QR dikhayein" -> the shopkeeper scans it with any UPI app (PhonePe, GPay, Paytm, BHIM ...). The money goes straight to the OWNER's UPI ID (Settings > Company > UPI ID). The salesman then types the UTR. No UPI ID in Settings -> the QR option is hidden.
 - Net Banking: reference / UTR. e-RUPI: voucher code / reference (the owner redeems e-RUPI through his bank's merchant app).
 - Cheque: number + date (+ bank). Cash: nothing extra.
- Everything arrives Pending on the Collection page. Owner / Manager / Accountant check the bank (UTR / reference is shown) and Accept or Reject. UPI -> bank book as UPI; Net Banking and e-RUPI -> bank book as Bank; Cash -> cash book; Cheque -> Cheques (counts when Cleared).

S3. Card payments at the counter (v1.92)

- "Card" money is settled by the card machine into your BANK account, so it is shown in the Bank Book (and in Cash/Bank Book with the "Card" filter), never in the Cash Book.
- The full bill amount is recorded. The card machine keeps a small fee (MDR): when your bank statement shows less, enter the difference as an expense "Bank charges" paid by Bank.

S4. Paying the supplier with the purchase (v1.93)

- Purchase Entry has "Paid now (Rs) ... by Cash / UPI / Bank / Cheque / Card". Leave 0 when the goods are on credit. Anything paid becomes a supplier payment at once: Cash leaves the Cash Book, the others the Bank Book, and the supplier's dues go down.
- The supplier must be in Masters > Suppliers (pick him from the list), and you cannot pay more than the bill.
- Fixed in v1.93: purchases typed with the supplier's name now always count in that supplier's ledger (before, only the payments showed), and cash paid to suppliers now leaves the Cash Book.

S5. Sending goods back to the supplier - Debit Note (v1.94)

- Purchase > "Returns (Debit Note)" (Owner and Manager).

- Against a purchase bill: pick the bill, type "Return qty" on the items, choose the reason, Save. Rate and GST come from that bill.
- Without bill (old stock that came before MarketFlow): choose the supplier, type his old bill no., add the items (rate and GST from the product - change them if needed), Save.
- MarketFlow then: lowers the stock; lowers what you owe that supplier (his ledger shows "Debit Note"); lowers your GST input credit in this month (ITC Summary and Purchase Register show the DN with a minus).
- "Refund received now": if the supplier gives money back instead of adjusting the next bill, enter it here (Cash -> Cash Book, UPI/Bank -> Bank Book).
- "Supplier credit note no. / date": fill it when the supplier sends his credit note - your CA matches it with GSTR-2B.
- Print selected -> the Debit Note PDF for the supplier. Cancel selected -> everything is reversed.
- You cannot return more than you bought on that bill (minus earlier returns) or more than you still have in stock. A bill with a debit note cannot be deleted, or edited below the returned quantity.

S6. Scan a supplier's bill with AI (v1.95)

- Owner: Settings > "AI Bill Scan" - choose Off, "Our own AI key" (Google Gemini has a free key to start; OpenAI or Anthropic Claude also work), or "Through Neotech" (Neotech switches it on and sets your daily limit).
- Purchase Entry > "Scan bill (AI)" > choose the photo (JPG/PNG) or PDF of the bill. A clear, straight, well-lit photo works best.
- A check window opens: every bill line with "Our product". Lines MarketFlow is not sure about say "Please choose" - pick the product. Correct any qty / rate / GST / batch / expiry. Red notes mean the bill's numbers do not add up - look at the bill.
- "Fill Purchase Entry" -> the items are in the cart -> press the normal Save (stock, batches, GST, supplier dues, "Paid now" all work as usual).
- MarketFlow remembers your product choices for that supplier, so the next bill from him matches by itself.
- Nothing is saved until you press Save. No internet / wrong key / limit used up -> a clear message; you can always enter the bill by hand.

K. EVERYDAY ROUTINE (a simple daily flow)

1. Morning: open Dashboard, check Low Stock and Outstanding.
2. Reorder low items - make a Purchase when goods arrive (stock goes up).
3. All day: New Sale for each customer (scan, add, pick mode, print).
4. Record Collection when customers pay old dues.
5. Enter any Expenses (rent, transport...).
6. Evening: check Day Book, and send WhatsApp Reminders to overdue shops.
7. Weekly: copy the backup to a pen-drive. Monthly: Reports (GSTR-1/3B), P&L.

L. COMMON PROBLEMS

- "Windows protected your PC" on install: More info > Run anyway.

- "Access denied" on re-install: close MarketFlow fully (or restart), then install again.
 - Product won't add to a bill: it has 0 stock - add stock via a purchase.
 - App closed suddenly: it now writes a log to the "logs" folder - send us error_.log and we will fix the cause.
 - Cannot delete a customer/shop: it has invoices - that is on purpose; make it inactive instead of deleting (invoices are permanent).
 - Invalid licence key: use the latest version and a key that matches THIS PC's Machine ID. Easiest: send a request from Settings > License.
 - Forgot login password: "Forgot password?" on the login window (see A1).
 - Update says "signature is NOT valid" (versions 1.83 - 1.88): install v1.89 or newer once from the website / pen-drive; after that updates install by themselves.
 - Salesman says "cross-site request refused" or "bad client or key": the link is old (key changed) - send him the new link from Links & QR.
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