KrishiVitar

User guide

Run your agri-input distribution business from godown to balance sheet: buying, stock, selling, credit, collections, accounts and GST.

Version 1.2 · October 2026 · For owners, office staff, salespeople and accountants

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KrishiVitar runs an agri-input distribution business end to end: buying, stock, selling, credit, collections, accounts and GST, with a dealer portal and a phone app for the field team. This guide explains how to set it up and do each day's work.

01 Getting started

Install the plugin once, open the app at **yoursite.com/app/**, and work through the setup checklist on the dashboard.

What you need

- A WordPress site (6.4 or later) on PHP 8.1 or later. Hostinger shared hosting works; nothing else needs installing.
- A browser on a computer, tablet or phone.

Install

1. In WordPress, go to Plugins → Add New → Upload Plugin, choose `krishivitar.zip` and click Activate.
2. Open **yoursite.com/app/**. The WordPress administrator signs in and is the Owner. From then on, signing in takes the owner straight to KrishiVitar; staff and dealers go straight to the full-screen app.
3. If `/app/` shows "page not found", go to WordPress → Settings → Permalinks and click Save once.
4. Before entering any PAN or bank account numbers, ask your web person to add this line to `wp-config.php`, using a random string of at least 32 characters. Never change it afterwards, or those numbers cannot be read back:

```
define( 'KV_ENCRYPTION_KEY', 'your-long-random-string' );
```

Optional: use the whole site for KrishiVitar. If the site exists only for KrishiVitar (for example erp.yourcompany.com), go to Settings → Owner settings and turn on **Open the app on the site's home page**. Visitors are then asked to sign in.

First-day checklist. The dashboard shows these steps and ticks each one off as you finish it:

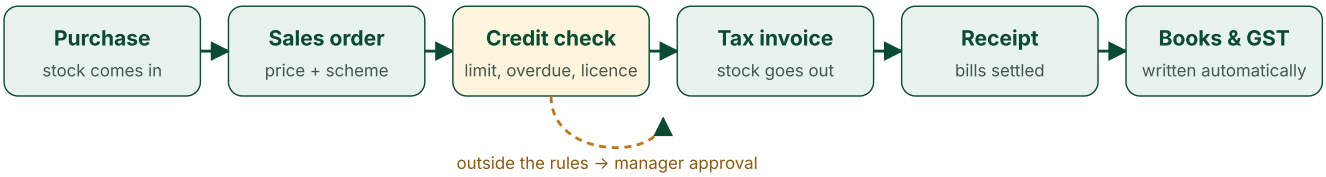
1. Complete the company profile: legal name, GSTIN, address, phone, bank details and licence numbers. These print on invoices.
2. Add your godowns.
3. Add product categories and manufacturers.
4. Add or import products.
5. Add or import dealers.
6. Add suppliers.
7. Invite your team under Users.

To explore before entering real data, click **Load demo data** on the dashboard. It creates a fictional Vidarbha distributor with products, batches, dealers, suppliers and opening balances. Load it only into an empty company, because it cannot be mixed with real records.

Moving around. The left menu groups screens by area: Field app, Catalogue, Network, Sales, Collections, Pricing, Purchases, Inventory, Accounts (which includes Reports) and Administration. Each person sees only the screens their role allows. On a phone, tap ☰ at the top left to open the menu. This guide is always one click away: Help and user guide in your name menu (top right) opens it as a PDF.

02 How the work flows

You enter business documents; KrishiVitar keeps stock, dealer balances and the books in step with them.



How the work flows: you enter documents; stock, balances and the books follow.

Every document goes through the same three states:

- **Draft:** saved but has no effect. You can edit or delete it.
- **Posted:** gets its number (for example INV/26-27/0001) and changes stock, balances and accounts. It can no longer be edited.
- **Cancelled:** a posted document that was a mistake. Cancelling reverses its effects and keeps it on record with the reason. Re-enter the correct version as a new document.

Numbers run without gaps for each document type and financial year, as GST requires. Posting into a closed or locked financial year is refused.

03 Users, roles and permissions

Only the Owner can delete or cancel by default; everyone else adds, edits and posts within their role, and every action is recorded.

Adding a person. Go to Users → Add user, enter their name, email, mobile and a password (at least 10 characters with letters and numbers, or click Generate), choose a role, and share the username and password with them. They sign in at yoursite.com/app/ and never see the WordPress admin area. People are made inactive, never deleted, so their history stays readable.

The built-in roles

Role	What they do
Owner / Admin	Everything, including settings, approvals, deleting and cancelling. Cannot be changed.
Staff	Adds, edits and posts purchases, stock, sales and collections. Cannot delete or cancel.
Accounts	Purchases, sales, receipts, supplier payments, accounts, GST, reports and the audit trail.
Sales Manager	Dealers, sales, price lists and schemes, collections, and approving orders that break credit or price rules.
Salesperson	Orders, receipts and follow-ups for **their own dealers only**.
Warehouse Manager	Purchases, batches, godowns, transfers, adjustments and stock takes.
Billing Operator	Orders and invoices within the rules; views collections.
Viewer	Read-only access to the main screens.

Changing what a role can do. Go to Roles, pick a role and tick boxes in the grid. Each module has six permissions: View, Add, Edit, Post / approve, Delete / cancel and Export. For example, to let Staff delete dealers but nothing else, tick Delete in the Dealers row only. You can also create new roles, and turn on **Own records only** for any role that should see only the dealers assigned to that person.

Safeguards that always apply:

- Every delete or cancel needs a reason, which is kept in the audit trail.
- Deleted records go to **Deleted items**, from where the Owner can restore them.
- A record that other records still use (a product with batches, say) cannot be deleted. Mark it inactive instead.
- Nobody can change their own role, make someone an Owner, or give a role permissions they do not hold themselves.

04 Master data and importing from Excel

Set up masters once (products, dealers, suppliers, godowns), then bring in your opening stock and opening balances, and you are ready to trade.

The masters

Master	Key details	Where
Products	SKU, name, technical name, category, manufacturer, licence class, HSN, GST rate, unit, pack size, MRP, rates, reorder level, batch and expiry tracking	Catalogue → Products
Batches	Batch or lot number, manufacture and expiry dates, seed test and validity dates, cost, MRP, status	Catalogue → Batches (also created automatically by purchases)
Categories, manufacturers, units, tax rates	Lists the products use	Catalogue
Dealers	Firm, proprietor, mobile, GSTIN, PAN, address, territory, salesperson, category A/B/C, credit limit and days, seasonal limit, pesticide, fertilizer and seed licence numbers and expiry dates	Network → Dealers
Territories	State, district, taluka and beat, each with a salesperson	Network → Territories
Suppliers	GSTIN, PAN, state, contact, payment terms, bank details	Network → Suppliers
Godowns	Code, name, branch, address, person in charge	Network → Godowns

KrishiVitar checks what you type: GSTIN format and check digit, GSTIN against the state and PAN, PAN, IFSC, PIN, HSN, 10-digit mobiles, and duplicate codes, GSTINs and mobiles. PAN and bank account numbers are stored encrypted and shown masked in lists.

Importing from Excel

1. Open the master's list and click **Import**.
2. Click **Example file** to see a filled sample, or **Template** for blank columns. Fill it in Excel and save as CSV.
3. Choose the file. Columns are matched by their names.
4. Click **Check file**. Nothing is saved yet; every problem is listed row by row.
5. Click **Import N valid rows**. Fix the rest and import them again.

Import in this order, because later files refer to earlier ones: manufacturers → categories → territories → godowns → suppliers → products → batches → dealers. In the files, products can be referred to by

SKU, dealers and suppliers by code, and dates written as dd-mm-yyyy.

Opening balances when you switch over

Coming from Tally? Accounts → Import from Tally brings all of this across in one go: dealers, suppliers, products, bill-wise dues, opening stock and ledger balances (see Import from Tally under Accounts, GST and Tally). Otherwise enter the opening figures by hand:

- **Opening stock:** Inventory → Adjustments → New, reason **Opening stock**, one line per product and batch with its quantity, expiry and cost.
- **What dealers owe you:** Collections → Opening dealer bills, one line per unpaid bill with its date and due date, so ageing is right from day one. These can be imported from CSV.
- **What you owe suppliers:** Purchases → Opening supplier bills, the same way.

To export any list, click **Export** on it. The file opens in Excel; spreadsheet formulas in the data are neutralised for safety.

05 Buying

A purchase is the only way stock comes in from a supplier: posting it adds the stock, creates new batches and records what you owe.

Purchase order (optional). Purchases → Purchase orders → New. Choose the supplier, the godown to deliver to and the products. **Place order** numbers it. As goods arrive against it, the order shows Partly received, then Received. Close an order that will never be completed with **Close order**.

Purchase (goods received with the supplier's bill)

1. Purchases → Purchases → New.
2. Enter the supplier, their invoice number and date, the godown, and optionally the purchase order it is against.
3. Add one line per product and batch: batch number, manufacture and expiry dates, quantity, free quantity, rate, discount % and MRP. GST is filled from the product; it is split into CGST and SGST, or IGST when the supplier is in another state.
4. Enter freight, loading and other charges if any. They are spread across the lines by value, so each batch carries its true landed cost.
5. Enter TDS if you deduct it; it reduces what you pay the supplier.
6. Click **Post purchase**.

An already-expired batch cannot be received as sellable stock. Free scheme quantity goes into stock at zero cost, or spread over the paid quantity, depending on your setting.

Purchase return. Purchases → Purchase returns → New. Choose the supplier, the original purchase and a reason (expiry, damage, season-end, quality, excess). On each line pick the batch and the stock condition it leaves from: sellable, damaged, quarantine or expired. Posting reduces stock and what you owe the supplier.

Paying suppliers. Purchases → Supplier payments → New. Enter the amount, mode (cash, cheque, UPI or bank transfer) and the account it was paid from, then tick the bills it pays; KrishiVitar suggests oldest first. Any amount not matched to a bill stays as an advance. Payables ageing shows what is due to whom, and when.

06 Stock

Stock is never typed in as a number: every quantity is the sum of posted movements, so any figure can be traced to the documents behind it.

Seeing stock. Inventory → Stock has two views:

- **By batch and godown:** each batch with its expiry, godown, condition, quantity and value. Expiry within 90 days shows amber; expired shows red. Filter by godown, condition or expiry window.
- **By product (all godowns):** sellable quantity against reorder level; products at or below it are marked **low**.

Click any row to open its **stock ledger**: every movement in and out, with the document, running balance and value.

Stock is kept in five conditions: **Sellable**, **Damaged**, **Quarantine**, **Expired** and **In transit**. Only sellable stock can be invoiced.

Moving stock between godowns

1. Inventory → Transfers → New. Choose the from and to godowns, the products, batches and quantities.
2. **Dispatch** takes the stock out of the source godown and shows it as in transit at the destination.
3. When it arrives, open the transfer, click **Receive at destination**, enter what actually arrived and confirm. Any shortage is written off and recorded.

Adjustments. Inventory → Adjustments → New, with a reason and an explanation:

Reason	Use it for
Opening stock	Stock you held before starting KrishiVitar
Move between conditions	Moving leaking or damaged bottles from sellable to damaged, or expired lots to expired
Damage, leakage, theft, sample, expiry write-off	Stock that is gone
Count correction	A plus or minus difference found on the shelf

Stock take (physical count)

1. Inventory → Stock takes → New, choose the godown, then click **Load book stock**.
2. Print or share the list, count the shelves, and enter the counted quantity on each line. The Difference column shows plus and minus.
3. **Post differences.** Only the differences are adjusted.

Stock cannot go below zero unless you change that in Settings, and then every such event is recorded in the audit trail. Stock is valued at weighted average cost, the same as Tally's default, or FIFO if you choose it in Settings.

07 Selling

Prices, schemes and the credit check are applied automatically, so a billing operator cannot quote the wrong rate or overshoot a dealer's limit without a manager's approval.

Price lists. Pricing → Price lists. A list applies to everyone (base), to a territory, to a dealer category (A, B, C), or to one dealer, from a start date. Enter its rates under Price list rates. On an order, the most specific list wins: the dealer's own list, then the category, then the territory, then the base list, then the product's standard dealer rate. Each order line shows which one it used.

Schemes. Pricing → Schemes. Two kinds:

- **Buy X get Y free:** for example, buy 10 get 1 free. Free quantity is added to the line automatically, in multiples.
- **Discount above a quantity:** for example, 5% off on 20 or more.

A scheme can be limited to one product or a whole category, a dealer category or a territory, and dates. Mark whether **you** or the **manufacturer** funds it; manufacturer-funded schemes appear in the Scheme and free goods report so you can claim them back. When several schemes match, the higher priority applies.

Sales order

1. Sales → Sales orders → New. Choose the dealer and the godown to supply from.
2. Add products and quantities. Rate, free quantity and discount fill in from the price list and schemes. A panel shows the dealer's limit, outstanding, overdue and credit available.
3. Click **Confirm order**. The credit check runs: - Within limit, nothing overdue, licences valid, prices as per list: the order is **Approved** and its stock is **reserved**, earliest expiry first, skipping batches with less than the minimum shelf life left. - Anything outside the rules: the order goes to **Approvals**.

Approvals. Managers with the "Credit and price approvals" permission see Sales → Approvals: each waiting order with the reason (limit exceeded, overdue bills, bounced cheques, price below list, extra discount or free goods, dealer on hold). Approve or reject with a reason; approving reserves the stock.

Tax invoice

1. From an approved order click **Make invoice**, or go to Sales → Invoices → New.
2. The batch on each line is picked earliest expiry first (FEFO). Expired batches cannot be sold. You can pick another batch.
3. Add transport details: transporter, vehicle number, LR number and e-way bill number.
4. Click **Post invoice**. Stock goes out and the dealer's outstanding goes up, with the due date set from their credit days.

If an invoice raised without an order breaks the credit rules, only someone with approval rights can post it, by choosing **Override and post** and giving a reason. Dealer licences are checked against the product classes on the invoice: an expired or missing licence gives a warning, or blocks the invoice if you choose that in Settings.

Printing and sharing. Posted documents have **Print**: an A4 tax invoice with your GSTIN, licence numbers, batch and expiry per line, the GST split and the amount in words. Use your browser's print to save as PDF. **Send on WhatsApp** opens WhatsApp with the invoice summary ready to send. Each invoice also offers **E-invoice** and **E-way bill** JSON files to upload to the government portals.

Sales return. Sales → Sales returns → New, against the original invoice, with a reason (season-end, expiry, damage, wrong item, quality). Returned goods never go straight back to sellable: pick each line's condition, usually quarantine or damaged, and move good stock back later with an adjustment. Posting issues a credit note that reduces the dealer's outstanding.

Cancelling. An order can be cancelled while it is awaiting approval or approved; its reservation is released. An invoice can be cancelled only before any payment or credit is adjusted against it.

08 Collections

Every rupee a dealer owes is visible by age, and every follow-up has a date and an owner.

Receipts

1. Collections → Receipts → New. Choose the dealer, amount and mode: cash, cheque or post-dated cheque, UPI, bank transfer (NEFT, RTGS, IMPS), or cash deposited in your bank.
2. Tick the bills it pays. KrishiVitar suggests oldest first; you can change it. Any amount left over stays as an advance for later bills.
3. Click **Post receipt**. Print a receipt (A5) or send it on WhatsApp.

Cheques. A cheque dated after the receipt date is a **post-dated cheque**: it does not reduce the outstanding until deposited. Collections → Cheques lists cheques due for deposit, deposited and cleared. Mark each one **Deposit**, then **Cleared** or **Bounced**. A bounce reopens the bills it paid, and you can bill bounce charges to the dealer with a debit note.

Credit and debit notes

- **Credit note:** reduces what the dealer owes without goods coming back: scheme payouts, cash or trade discount, rate difference, damage claims, freight reimbursement.
- **Debit note:** adds to what the dealer owes: bounce charges, interest on late payment, rate difference, freight.

Both carry GST where it applies. For goods coming back, use a sales return instead.

Collection board. Collections → Collection board lists dealers with overdue bills, largest first, with their salesperson. For each one you can:

- **Log follow-up:** a call, visit or message, what was said, and the next follow-up date.
- Record a **promise to pay**: an amount and a date. Broken promises are flagged.
- **Send a payment reminder on WhatsApp** with the outstanding and overdue amounts filled in.

Ageing. Collections → Receivables ageing splits each dealer's outstanding into Not due, 1–30, 31–60, 61–90, 91–180 and over 180 days, by due date. It can be run as of any past date. Payables ageing does the same for suppliers.

Dealer 360. Click any dealer's name in a collections screen to see everything about them on one page: outstanding and ageing, credit limit used, recent invoices, receipts and returns, follow-ups and promises, licences, and the button to give them dealer portal access. Print or download their **statement** for any period, with opening balance, every document and running balance.

09 Accounts, GST and Tally

You never key accounting entries for routine work: every posted purchase, invoice, return, receipt, payment, note and stock adjustment writes its own double-entry automatically, including cost of goods sold at weighted average and the GST input and output ledgers.

Entries you do key

- **Expenses** (Accounts → Expenses): rent, salaries, fuel, electricity, godown labour. Choose where the money came from and the expense heads.
- **Journal vouchers** (Accounts → Journal vouchers): depreciation, provisions, bank charges, capital introduced, cash-to-bank transfers. Debits must equal credits. Dealer, supplier and stock balances can only change through their own documents, not by journal.

Chart of accounts. Accounts → Chart of accounts comes ready with the usual Indian trading groups (capital, sundry debtors and creditors, duties and taxes, sales, purchases, direct and indirect expenses, bank accounts). Add your own ledgers, for example each bank account under Bank accounts.

Statements. Trial balance, Profit and loss, Balance sheet, and Ledgers and day book, each for any date or period, with drill-down to the document. Closing stock in the profit and loss comes from the stock valuation, so stock and books always agree.

Bank reconciliation. Tick the entries that appear in your bank statement and give the date each cleared. The screen shows deposits not yet in the bank and the balance as per bank.

GST returns. Accounts → GST returns gives the GSTR-1 summary with a **Download GSTR-1 JSON** for the GST portal, and the GSTR-3B summary with input tax set off in the IGST-first order. Check them against your books before filing, and match input credit against GSTR-2B before claiming it. E-invoice and e-way bill JSON files are downloaded from each invoice. Direct filing through a GST provider is not included yet.

Export to Tally. Accounts → Export to Tally downloads two XML files for Tally Prime or ERP 9. In Tally, open the company and go to Gateway of Tally → Import → Masters and choose the masters file first (dealers and suppliers become party ledgers with their GSTIN), then Import → Transactions with the vouchers file.

Import from Tally. For the day you switch over. Accounts → Import from Tally reads Tally's own XML export and brings across your masters and opening balances. Past vouchers stay in Tally; from the switch-over date the work happens here, and Export to Tally keeps your accountant's books up to date.

1. In Tally Prime or ERP 9, open the company and go to Display More Reports → List of Accounts. Press Alt+E (Export), choose XML (Data Interchange) and export. Switch the list to inventory masters (stock items) and export again. Menu names differ slightly between versions; any XML export of masters works.

2. In KrishiVitar, choose both files, set the switch-over date and click Read the files. Nothing is saved yet.
3. Check each tab. Fill in what Tally does not have: a 10-digit mobile for each dealer (required here), an HSN code or GST rate a product is missing, and the expiry date of stock in a product that tracks expiry. Set the licence class of each new category. Untick anything you do not want.
4. Click Import. A progress bar runs through the steps, and the result says whether the opening trial balance agrees with Tally.

From Tally	Becomes in KrishiVitar
Ledgers under Sundry Debtors (and its sub-groups)	Dealers, with GSTIN, PAN, address, mobile, email, credit days and credit limit
Ledgers under Sundry Creditors	Suppliers, with GSTIN, address and payment terms
Bill-wise opening dues	Opening dealer and supplier bills with their bill date and due date, so ageing is right from day one. A balance that is not bill-wise becomes one bill called OPENING.
Stock items	Products with HSN, GST rate, unit and MRP. The alias becomes the SKU. Stock groups become categories.
Opening stock by godown and batch	A posted opening stock adjustment per godown, batch by batch with expiry. Stock without a batch goes into a batch called OPENING. Main Location goes to the godown you choose; other godowns are matched by name or added.
Bank, cash, capital, loans, fixed assets and other balance-sheet ledgers	Accounts with their opening balance. Tally's Cash goes onto Cash in hand.

Not imported, and listed on the Not imported tab: GST and TDS ledgers (enter those balances on the system tax accounts), advances (enter them as receipts or payments on account), income and expense ledgers (they have no opening balance) and negative stock. Records already in KrishiVitar are matched by GSTIN or name and never duplicated, and opening stock is never imported twice, so it is safe to run the import again. Everything it adds is in the audit trail.

Year end and backup (Accounts → Year end and backup)

- **Close year** once the stock take, bank reconciliation and GST returns are done. Nobody can then post, edit or cancel documents dated in that year. Balances carry forward and the next year is created. The Owner can reopen a year with a reason.
- **Rebuild the ledger** recreates every accounting entry from the documents. Use it if the trial balance or balance sheet ever shows a mismatch warning.
- **Download backup** (Owner only) saves every record of the company as one file. Keep it alongside your host's own backups.

10 Reports

Accounts → Reports, open any report, set the period and filters, and download it as CSV or print it; click a total or a document number to see what is behind it.

Area	Reports
Sales (14)	Sales register · Sales by dealer · by product · by category · by manufacturer · by territory · by salesperson · by month · Margin by invoice · Sales returns register · Returns by reason · Scheme and free goods · Price and scheme deviations · Pending sales orders
Purchases (5)	Purchase register · Purchases by supplier · Purchases by product · Purchase returns register · TDS deducted
Stock (8)	Stock valuation · Stock by godown · Expiry report · Slow and non-moving stock · Stock movement summary · Write-offs and adjustments · Stock in transit · Reorder list
Collections and credit (9)	Receipts register · Collections by salesperson · Supplier payments register · Cheque bounces · Credit limit utilisation · Overdue bills · Promises to pay · Credit and debit notes · Dealer licences
Accounts and GST (4)	Expense register · Expenses by head · GST by rate · HSN summary (outward)

Alongside these 40 reports sit the trial balance, profit and loss, balance sheet, ledgers, day book, ageing, stock ledger and party statements described in earlier sections. A salesperson's reports show only their own dealers.

The dashboard summarises the day: sales, stock value by godown, receivables and overdue, cheques due for deposit, expiring batches, low stock, expired dealer licences, orders awaiting approval and recent activity. Each card opens the screen behind it.

11 Dealer portal and the field app

Dealers can check their own account and order online, and salespeople can work from their phones, both from the same address as the main app.

Giving a dealer portal access

1. Open the dealer's Dealer 360 page and click **Give portal access**, using the dealer's email address.
2. KrishiVitar creates their sign-in and shows the username, a temporary password and the app address. Share them by WhatsApp or in person.
3. The dealer signs in at the same yoursite.com/app/ address and sees only their own account.

In the portal a dealer can:

- See what they owe, how much is overdue, their credit available and orders in progress.
- Open their bills, receipts, credit notes and statement for any period.
- Browse the catalogue at **their own prices**, with stock shown as in stock or on order.
- Place an order. It enters the normal flow: confirmed and reserved if within the rules, otherwise sent to your Approvals queue.

Remove access from the same Dealer 360 page at any time.

The field app for salespeople

- On an Android phone, open yoursite.com/app/ in Chrome and tap **Install** when KrishiVitar offers it (or Chrome menu → Add to Home screen). It then opens like an app.
- **Field app** in the menu gives one-tap actions: new order, record a collection, log a follow-up, look up stock, and the day's overdue dealers.
- **Weak or no signal:** orders, receipts and follow-ups saved while offline wait in the **Outbox** on the phone and are sent automatically when the connection returns. A banner shows when you are offline. Screens that need live data, such as stock, say so plainly.

WhatsApp. Invoices, payment reminders and portal sign-in details have a **Send on WhatsApp** button. It opens WhatsApp with the message written; you tap Send. Fully automatic messages need the WhatsApp Business API, which is planned for later.

12 Security, audit trail and settings

Every addition, edit, deletion, cancellation, approval, permission change, export and sign-in is recorded with who, when, from which IP, and why.

Audit trail. Administration → Audit trail lists every entry, searchable by person, action, record type and date. Edits show each changed field's old and new value; deletions keep a copy of the record as it was. Every record and document also has its own **History** tab. Entries cannot be edited from the app, and **Verify integrity** checks that nobody has altered them directly in the database.

Signing in safely

- **Two-step sign-in:** each person can turn it on from the menu under their name at the top right (Two-step sign-in) using Google Authenticator, Microsoft Authenticator or a similar app. The Owner can require it for everyone in Settings. If someone loses their phone, the Owner opens them under Users and clicks Reset two-step sign-in so they can set it up again.
- After 5 wrong passwords, that username is locked for 15 minutes from that device. If it happens to you, wait, or sign in through your host's control panel (in Hostinger: hPanel → WordPress → Admin panel).
- Staff never see the WordPress admin area; they are kept inside the app.
- PAN and bank account numbers are stored encrypted.

Settings (Administration → Settings)

Setting	Default	What it does
Expiry alert windows	90, 60, 30 days	When batches start showing as near expiry
Minimum shelf life left to sell	60 days	Batches closer to expiry are not reserved for orders
Negative stock	Block	Or allow it, with each case recorded in the audit trail
Stock valuation	Weighted average	Or FIFO
Free scheme quantity cost	Zero cost	Or spread over the paid quantity
Licence warning	30 days	Warn about dealer licences expiring within this time
When a dealer licence has expired	Warn	Or block the invoice

Owner-only settings: **multi-company mode** (several companies with separate books in one installation, switched from the top bar), **require two-step sign-in**, the **app address** (default /app/), **open the app on the site's home page**, and **delete all data when the plugin is deleted** (off by default;

leave it off). Company structure (profile, branches with their own GSTIN, financial years) is reached from the same screen.

13 Troubleshooting and common questions

Problem or question	What to do
/app/ shows "page not found"	WordPress → Settings → Permalinks → Save once.
"Too many failed attempts" at sign-in	Wait 15 minutes, use Lost your password, or sign in through your host's control panel.
A screen says "No access"	Your role does not include it. Ask the Owner to tick that module for your role under Roles.
"Not enough stock" when posting	The chosen batch and godown has less sellable stock than the line. Pick another batch, transfer stock in, or check whether the stock is reserved for an approved order.
"Only drafts can be changed"	Posted documents are locked. Cancel it with a reason and enter a corrected one.
An invoice or purchase will not cancel	Payments or credits are adjusted against it, or its stock has already been sold or moved. Undo those first.
"No financial year covers this date" or "year is closed"	Add the year under Settings → Financial years, or ask the Owner to reopen it.
An order is stuck as Awaiting approval	A manager approves it under Sales → Approvals.
Trial balance or balance sheet shows a mismatch warning	Accounts → Year end and backup → Rebuild the ledger.
The phone shows an Outbox count	Items saved offline are waiting. They send by themselves once online, or tap Send now.
A dealer cannot sign in to the portal	Open their Dealer 360, check portal access, and give access again to issue a new password.
Screens show English instead of Hindi or Marathi	Every screen is translated from version 1.1. Check the user's Language under Profile (the name menu → Profile), then sign out and back in. Names you typed yourself, such as products and dealers, stay as entered. A word that reads wrong can be corrected in languages/source/translations.tsv.

Not included yet

- Automatic WhatsApp messages (needs a WhatsApp Business API account; click-to-send works today).
- Direct filing of GST returns, e-invoices and e-way bills through a GST provider; KrishiVitar produces the files for upload.
- Barcode scanning in the field app.
- Stock (inventory) vouchers in the Tally export; accounting vouchers are exported.
- Importing past vouchers from Tally; the import brings masters and opening balances only.
- Return windows and deduction percentages by product class; returns are accepted case by case.
- Payroll, depreciation schedules and income-tax computation.

Getting help. Open this guide from your name menu → Help and user guide. For a problem, note the screen, the document number and the exact message, and check the record's History tab and the audit trail for what changed and who changed it.