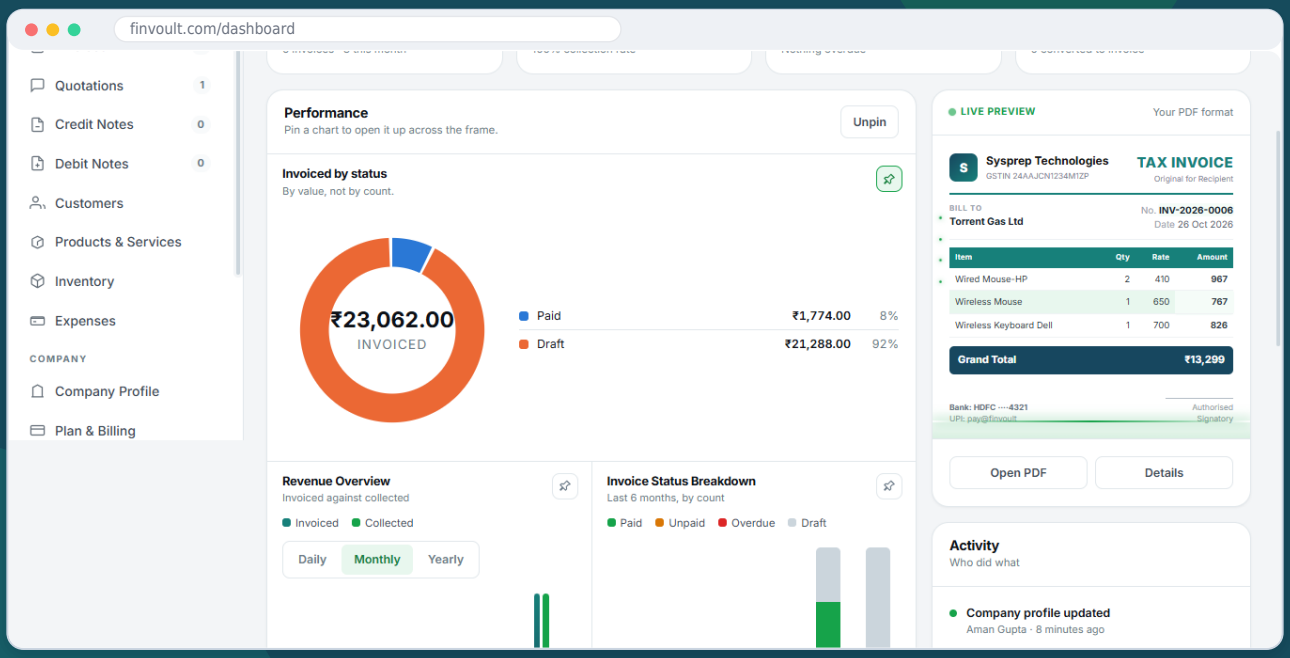
Finvoult

GST-READY · MADE FOR INDIA

Finvoult Customer Guide

From Signup to Your First Invoice

Every step, every screen and every feature – from creating your account to GST invoices, quotations, inventory, expenses, credit & debit notes and team roles.



GST Invoices | Quotations | Inventory | Expenses | Credit & Debit Notes | Team Roles

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Invoices and quotations, done in under a minute.

finvoult.com

A product of Sysprep Technologies · Edition 1.0 · October 2026

1 Welcome to Finvoult

WHAT YOU WILL LEARN
What Finvoult is, who it is for, and how much you can finish in under a minute.

Finvoult is a GST-ready invoice and quotation generator made for Indian businesses. Save your customers and items once, and every bill after that is a few clicks. GST, totals and amount in words are calculated for you, and the PDF comes out looking professional. As you grow, the same account also handles **inventory, expenses, credit & debit notes, staff roles and analytics**.

Who is it for? Small businesses · Medium & large businesses · Freelancers · Accountants · Office staff

What you can do in under a minute

1. **Pick a customer** — Details auto-fill
2. **Add your items** — Rates & GST fill in
3. **Check the preview** — Totals are automatic
4. **Download the PDF** — Share or print

Everything inside Finvoult

GST invoices that add up
Item-wise discount, CGST/SGST or IGST, round-off and amount in words – all automatic.

Quotations that become invoices
Send a quotation. When the client approves it, convert it to an invoice in one click.

Saved customers & items
Add a customer once. Address, GSTIN and phone fill in by themselves next time.

Professional PDF
Your logo, colour, bank details and signature on a clean A4 document every time.

Digital signature
Draw it once or upload an image, and apply it to any invoice or quotation.

Team roles & permissions
Add Manager, Accountant or Staff users and decide what each can see and do.

BUSINESS+

Inventory & stock
Stock goes down by itself when you raise an invoice. See low and out-of-stock items.

BUSINESS+

Expense tracker
Record what you spend and see how much GST you can claim back.

BUSINESS+

Credit & debit notes
Adjust a bill after it is issued with proper credit and debit notes.

PRO TIP
Plans: the Free plan covers invoices, quotations, signature, analytics, logo & colour and CSV export. Inventory, Expense tracker and Credit & debit notes start from the **Business** plan (₹499/month).

2 Contents & how to use this guide

WHAT YOU WILL LEARN
Where to find each topic, and how to read the steps, red callouts and tip boxes.

1 Welcome to Finvoult 2
2 Contents & how to use this guide 3
3 Choosing & buying a plan 4
4 Creating your account 7
5 Logging in & dashboard tour 9
6 Setting up your business profile 12
7 Saving customers 15
8 Saving items & services 16
9 Creating a GST invoice 17
10 Quotations that become invoices 21
11 Digital signature 22
12 Professional PDF customisation 23
13 Team roles & permissions 24
14 Inventory, expenses, credit & debit notes 25
15 Analytics, reports & CSV export 28
16 Using Finvoult on mobile 29
17 A day in the life: quote to payment 30
18 FAQs, troubleshooting & GST checklist 31
19 Quick-start cheat sheet 33
20 Support & request a demo 34
21 Back cover 35

How to use this guide

1. **Green numbered badge** – one action per step. Follow them in order.
2. **Red numbered callout** – points to the exact button or field on the screen.

PRO TIP
Shortcuts and good habits that save time.

NOTE
Extra information worth knowing.

COMMON MISTAKE
A mistake many people make – and how to avoid it.

FREE
Available on every plan, including the free one.

BUSINESS+
Needs the Business (₹499/month) or Enterprise (₹1,499/month) plan.

[confirm]
Detail not public on finvoult.com yet. Check it on your own screen or ask us before relying on it.

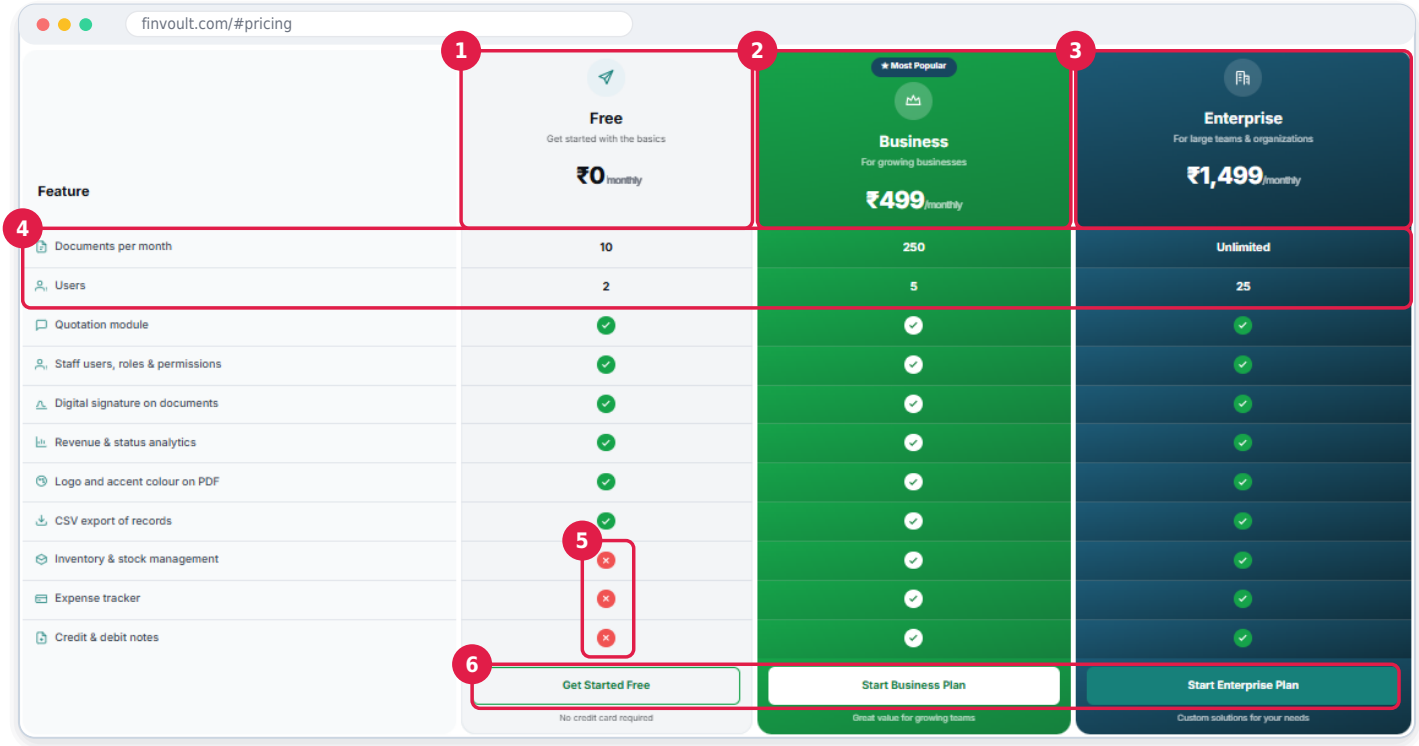
ILLUSTRATIVE SCREEN
Drawn to show the layout where a real screenshot was not available.

NEXT STEP ▸ Section 3: pick the plan that fits your business.

3 Choosing & buying a plan

WHAT YOU WILL LEARN
What each plan includes, which one suits you, and how to start or change plans.

Scroll to **Pricing** on finvoult.com. Every plan has the same core tools; paid plans add limits and extra modules.



1. **Free** – ₹0 monthly, no credit card.
2. **Business** – ₹499/month, most popular.
3. **Enterprise** – ₹1,499/month, for large teams.
4. **Limits** – Documents per month and users.
5. **Locked on Free** – Inventory, Expense tracker, Credit & debit notes.
6. **Plan buttons** – Get Started Free / Start Business Plan / Start Enterprise Plan.

FREE
₹0 monthly

- ✓ 10 documents / month
- ✓ 2 users
- ✓ Quotations, signature, analytics
- ✓ Logo & colour, CSV export

BUSINESS
₹499 per month

- ✓ 250 documents / month
- ✓ 5 users
- ✓ Everything in Free
- ✓ + Inventory, Expenses, Credit & debit notes

ENTERPRISE
₹1,499 per month

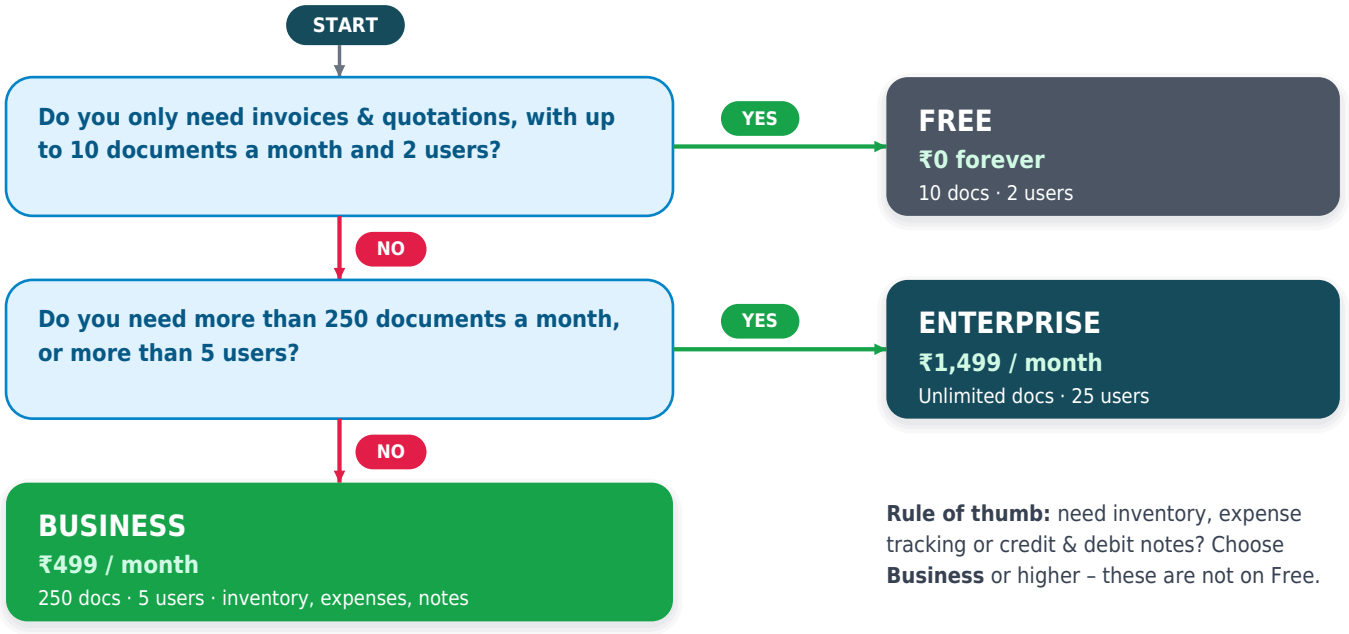
- ✓ Unlimited documents
- ✓ 25 users
- ✓ Everything in Business
- ✓ For large teams & organisations

PRO TIP
Not sure? Start on **Free**. You can upgrade later without losing your customers, items or documents **[confirm]**.

NEXT STEP ▸ Not sure which plan? Use the decision chart on the next page.

Which plan is right for me?

Answer two questions from the top. Follow YES or NO.



Rule of thumb: need inventory, expense tracking or credit & debit notes? Choose **Business** or higher – these are not on Free.

How to start your plan

1. **Open finvoult.com and scroll to Pricing**
   Or use the **Pricing** button in the top menu.

2. **Click your plan button**
   Get Started Free, **Start Business Plan** or **Start Enterprise Plan**. The sign-up page opens with that plan selected.

3. **Register your business**
   Enter your business name and details (see Section 4). Your company is set up as soon as you submit.

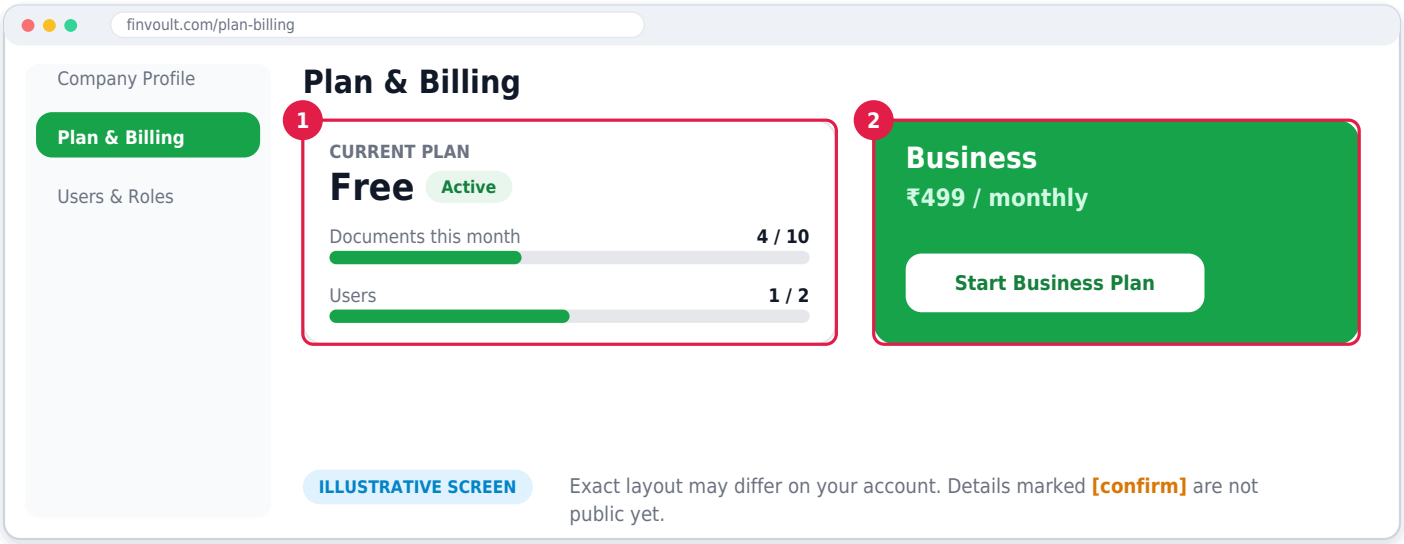
4. **Upgrade or change plan later**
   Open **Plan & Billing** in the left menu and choose a new plan (see next page).

> **NOTE**
> Free needs no credit card. The plan buttons on the site open registration as **?plan=starter**, **?plan=business** or **?plan=enterprise**.

NEXT STEP ▸ Payment, renewal and changing plans.

Payment, renewal and plan changes

Manage everything from **Plan & Billing** in the left menu (under Company).



Task	How to do it	Details
Upgrade	Plan & Billing → choose **Start Business Plan** or **Start Enterprise Plan**.	Takes effect **[confirm]**
Pay	Complete payment when asked. Business is ₹499/month, Enterprise ₹1,499/month.	Payment methods: **[confirm]**
Renew	Plans are billed monthly. Renew from Plan & Billing before the period ends.	Auto-renew: **[confirm]**
Change plan	Pick a different plan in Plan & Billing. Your data stays in your account.	Pro-rating: **[confirm]**
Downgrade or cancel	Switch back to Free from Plan & Billing. Extra users and Business-only modules may be limited.	Policy: **[confirm]**
Subscription receipts	Download billing receipts from Plan & Billing.	Availability: **[confirm]**

NOTE

Seats: the Users & Roles page shows how many seats are left on your plan (for example “24 seats left” on Enterprise).

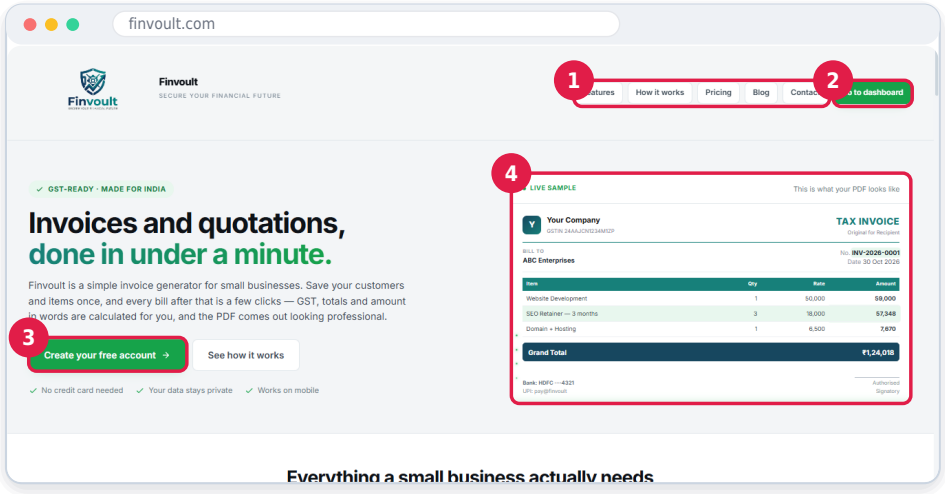
NEXT STEP ▸ Section 4: create your account.

4 Creating your account

WHAT YOU WILL LEARN
How to open the sign-up form and what to type in every field. It takes about five minutes.

1 Open finvoult.com and click “Create free account”

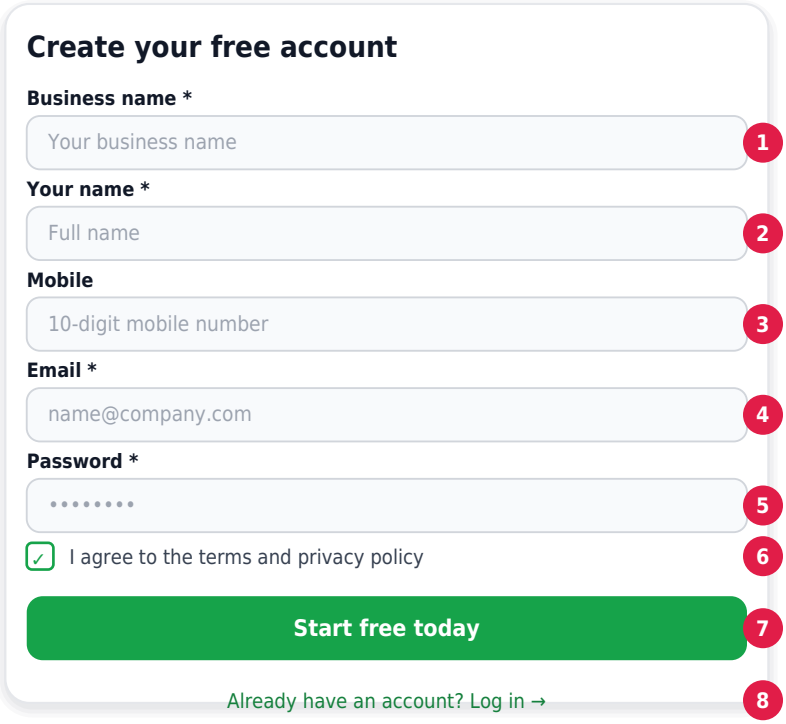
Use the green button in the top menu or the big button in the first screen. Already registered? The top menu shows **Log in**.



1. **Menu** – Features, How it works, Pricing, Blog, Contact.
2. **Top button** – Create free account (Log in or Go to dashboard if you already have an account).
3. **Main button** – Create your free account.
4. **Live sample** – This is what your PDF looks like.

2 Fill in the sign-up form

Fields as shown on the form on finvoult.com. Fields marked * are required.



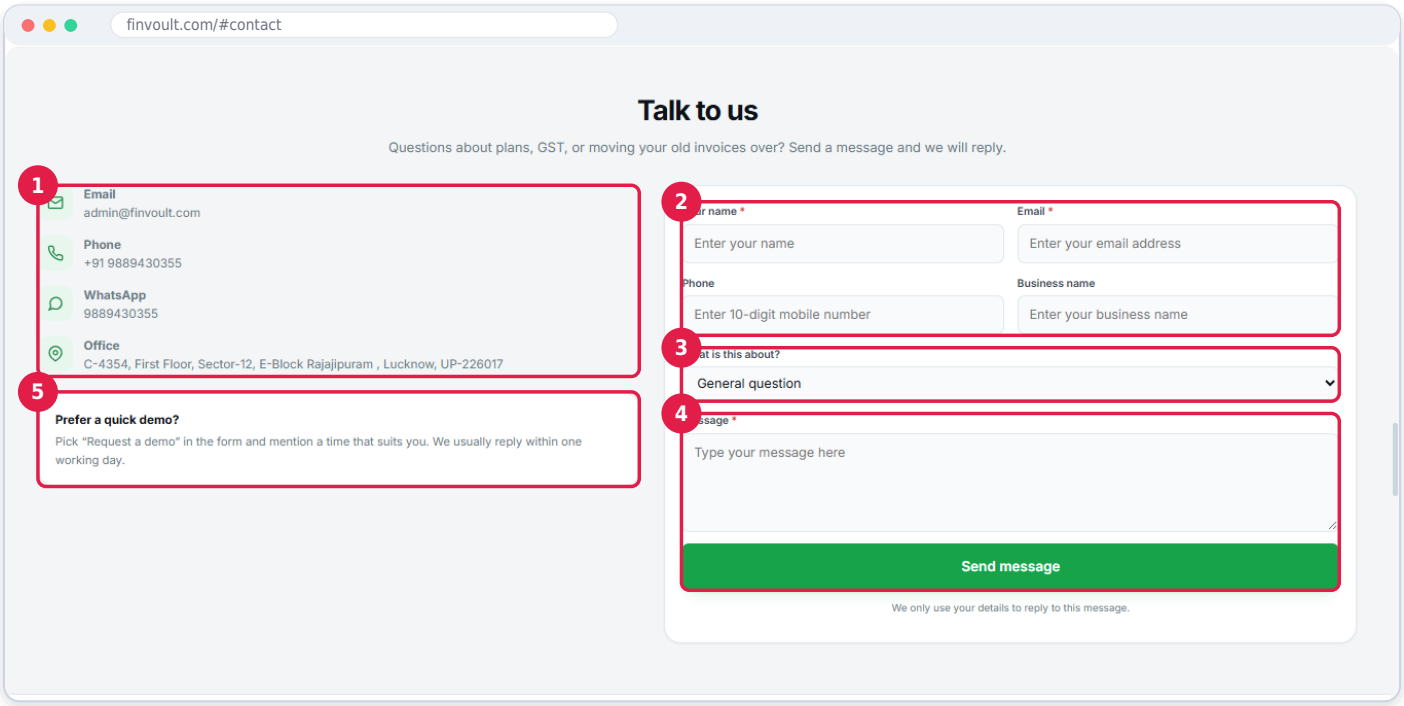
1. **Business name** – The name printed on every invoice.
2. **Your name** – The account owner.
3. **Mobile** – For callbacks and alerts.
4. **Email** – You will log in with this.
5. **Password** – Choose a strong one. Min length **[confirm]**.
6. **Terms** – Tick to agree to terms and privacy policy.
7. **Start free today** – Creates your account.
8. **Log in link** – For existing users.

COMMON MISTAKE
Use an email you check often – it becomes your login. Staff you add later get their own email and password.

NEXT STEP ▸ Section 5: log in and take the dashboard tour.

Prefer a guided start? Request a demo

Questions about plans, GST or moving old invoices over? Use **Talk to us** at the bottom of finvoult.com.



1. **Contact details** – Email, phone, WhatsApp and our Lucknow office.
2. **Your details** – Name, email, phone and business name.
3. **What is this about?** – General question, Pricing / plan enquiry or Request a demo.
4. **Message + Send** – Write your message, then click Send message.
5. **Quick demo** – Choose "Request a demo" and mention a time; we usually reply within one working day.

Your first 5 minutes

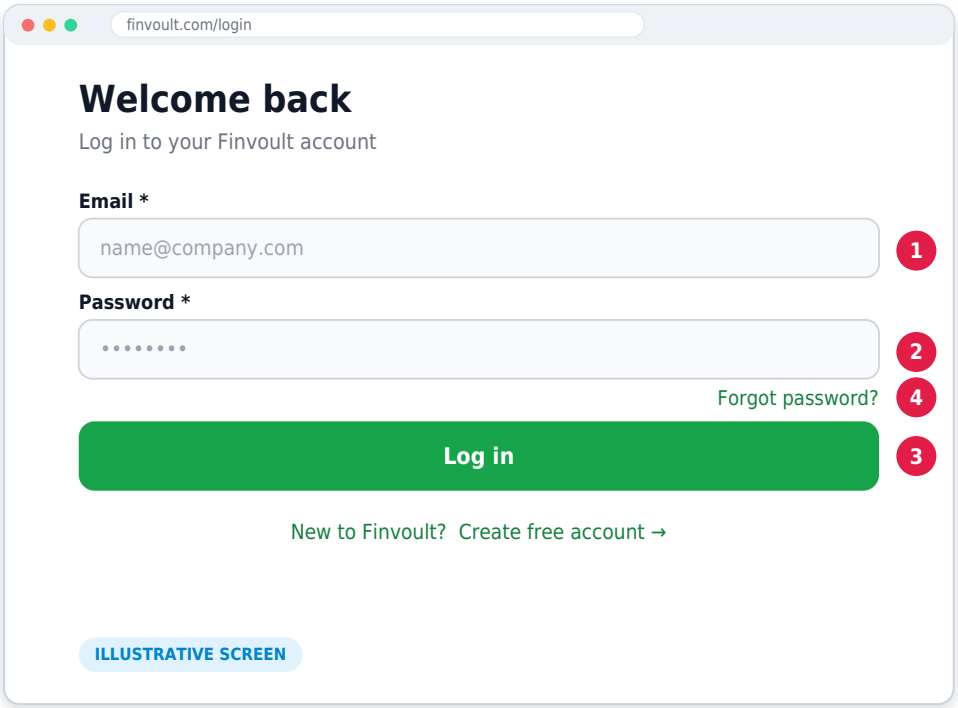
Four steps from sign-up to your first invoice.

1. **Create your account**
   Business name and email. That is your company set up.
2. **Add your details**
   Logo, GSTIN, address and bank details print on every document.
3. **Save customers & items**
   Add the people you bill and what you sell, with rates and GST.
4. **Generate and send**
   Pick a customer, add items and download the PDF.

NEXT STEP ▸ Section 5: log in and explore your dashboard.

5 Logging in & the dashboard tour

WHAT YOU WILL LEARN
How to log in, what to do if you forget your password, and what every part of the dashboard means.



1. **Email** – The one you used to register.
2. **Password** – Case-sensitive.
3. **Log in** – Opens your Dashboard.
4. **Forgot password** – Link name **[confirm]**

1 Go to finvoult.com/login

Or click **Log in** in the top menu of finvoult.com.

2 Enter your email and password, then click Log in

You land on the **Dashboard**. Staff log in with their own email and password.

3 Forgot your password?

Use the reset link on the login page **[confirm]** or email **admin@finvoult.com** from your registered address and we will help you get back in.

COMMON MISTAKE
Extra spaces when copy-pasting your email or password cause “wrong password” errors. Type it, or paste carefully.

PRO TIP
Use the **Dark / Light** switch at the top right of any page to pick the look you prefer.

Good login habits

Use a strong password

Mix letters, numbers and symbols. Do not reuse your email password.

One login per person

Add staff in Users & Roles. Never share the owner login.

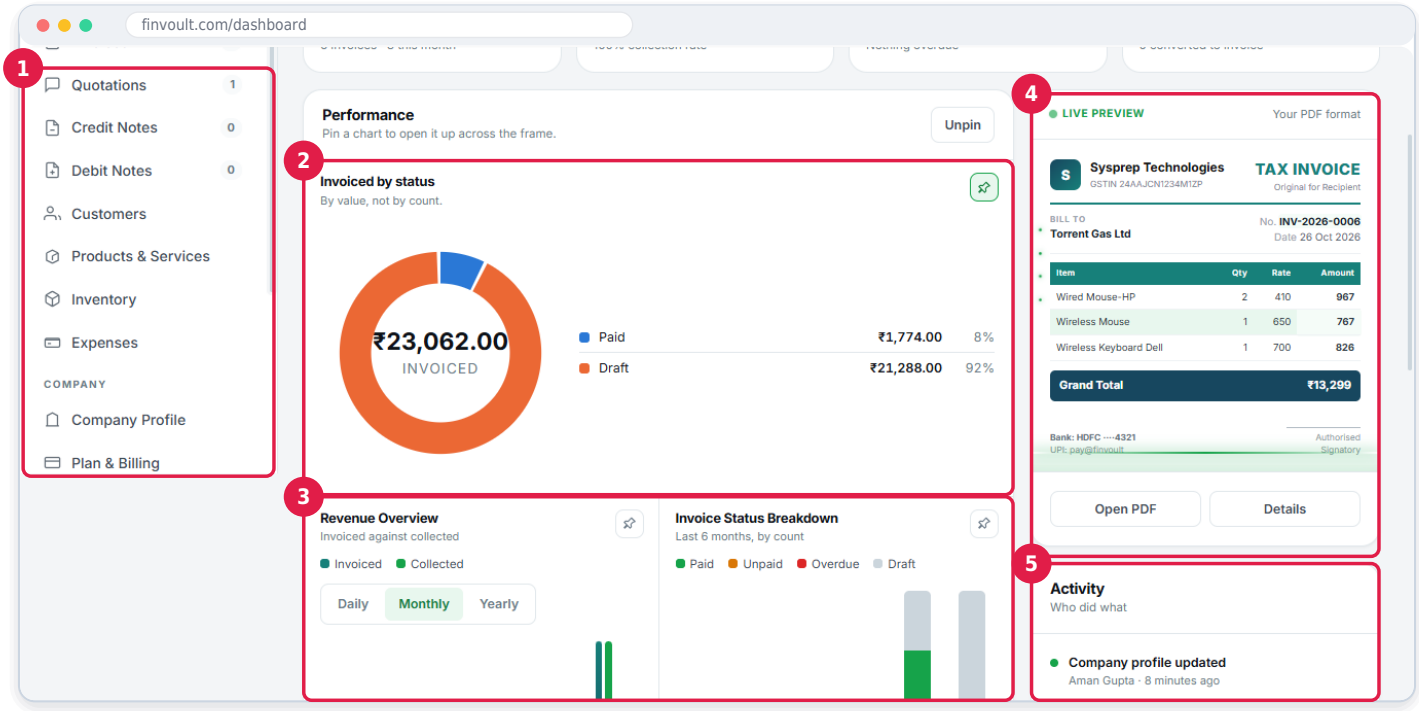
Log out on shared devices

On a shop computer or a friend’s phone, log out when you finish.

NEXT STEP ▸ The dashboard tour.

Your dashboard tour

The Dashboard is the first page after login. It shows how your business is doing at a glance.



1. **Left menu** – Every module: Invoices, Quotations, Credit & Debit Notes, Customers, Products & Services, Inventory, Expenses, Company Profile, Plan & Billing.
2. **Performance** – Donut chart: invoiced value by status (Paid, Draft). Click the pin to open a chart across the frame; Unpin to close it.
3. **Revenue & status** – Revenue Overview (Invoiced vs Collected, Daily / Monthly / Yearly) and Invoice Status Breakdown (Paid, Unpaid, Overdue, Draft).
4. **Live preview** – Your PDF format. Use Open PDF to see the document, or Details for more.
5. **Activity** – Who did what – for example “Company profile updated”.

NOTE

The cards at the very top (invoices this month, collection rate, overdue, converted to invoice) update as you work.

PRO TIP

A high Draft share means invoices are created but not yet sent. Finish drafts to see your Paid and Unpaid picture.

A 2-minute morning check

Overdue
Who has not paid yet? Follow up today.

Invoiced vs Collected
Is cash catching up with billing?

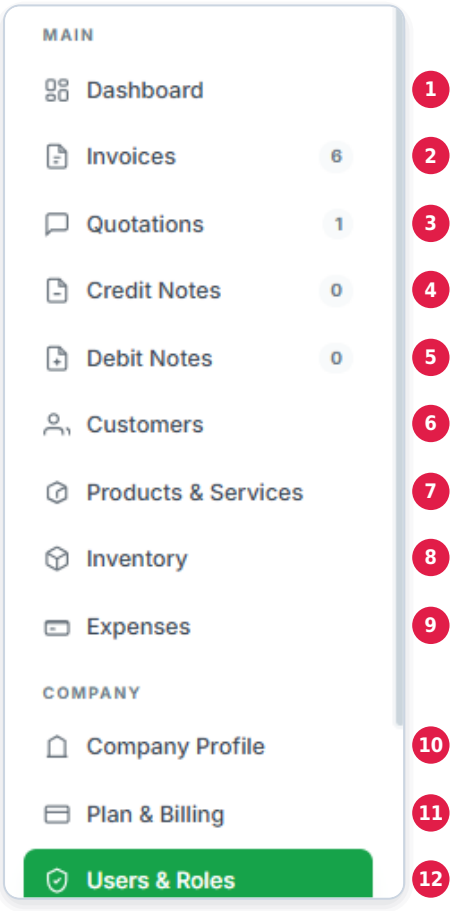
Drafts
Finish and send any unsent invoices.

Activity
See what your team changed.

NEXT STEP ▸ A map of the left menu.

Left-menu map

Everything in Finvoult is one click away from the left menu.



#	Menu	What it is for	Plan
1	**Dashboard**	Charts, live PDF preview and activity.	Free
2	**Invoices**	Create, search, preview, download and copy GST invoices.	Free
3	**Quotations**	Send quotes and convert approved ones to invoices.	Free
4	**Credit Notes**	Reduce a bill that was already issued.	Business+
5	**Debit Notes**	Increase a bill that was already issued.	Business+
6	**Customers**	Saved customers with billed and outstanding amounts.	Free
7	**Products & Services**	Items with HSN/SAC, unit, rate and GST %.	Free
8	**Inventory**	Stock on hand, low stock and stock value.	Business+
9	**Expenses**	Spending, GST paid and claimable input credit.	Business+
10	**Company Profile**	Logo, GSTIN, bank, QR, numbering and notes.	Free
11	**Plan & Billing**	Your plan, limits and upgrades.	Free
12	**Users & Roles**	Add staff and set permissions.	Free

NOTE

Menu names above are exactly as they appear in the app. Numbers in red match the red badges on the menu picture.

Quick find: “I want to…”

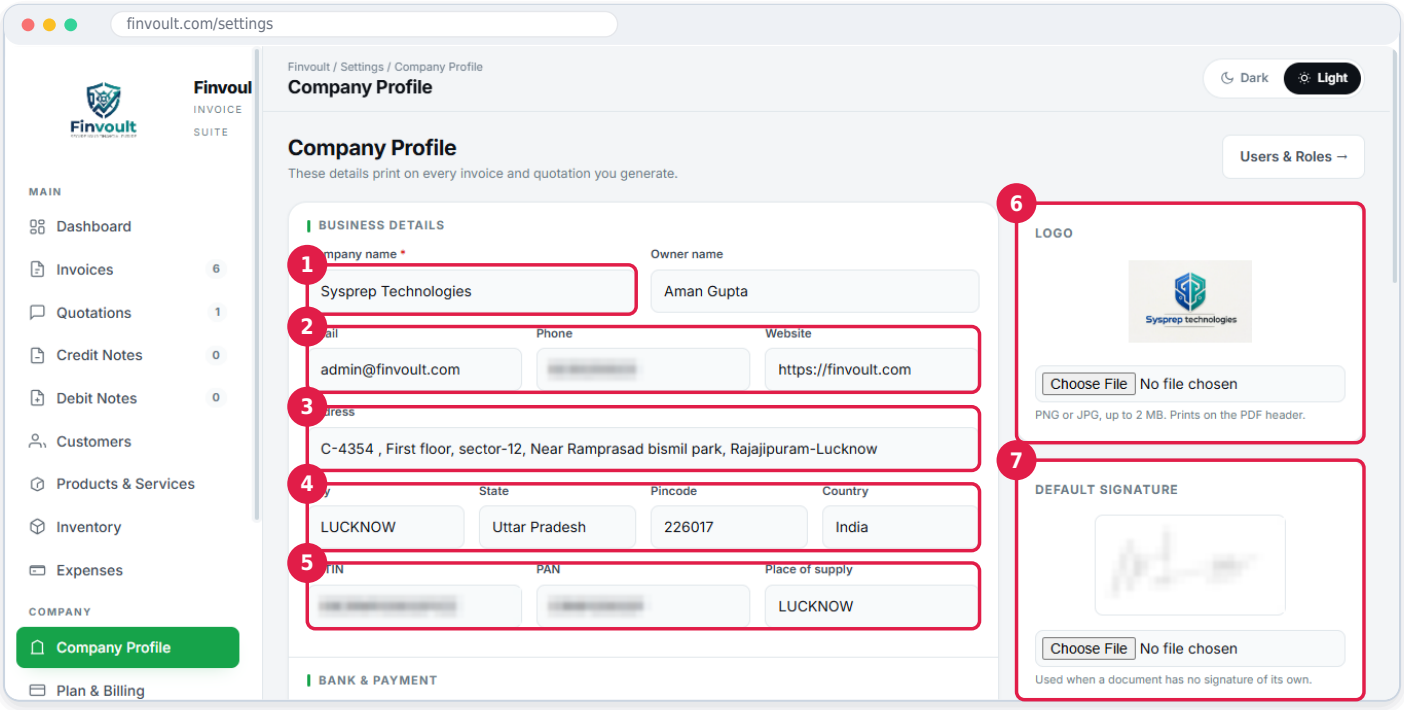
I want to…	Go to	Then click
Create an invoice	Invoices	New Invoice
Send a quote	Quotations	New Quotation
Save a new customer	Customers	Add Customer
Add something I sell	Products & Services	Add Item
Change my bank or UPI details	Company Profile	Bank & payment section
Add a staff member	Users & Roles	Add user
Upgrade my plan	Plan & Billing	Choose a plan

NEXT STEP ▸ Section 6: set up your business profile.

6 Setting up your business profile

WHAT YOU WILL LEARN
Where to enter your logo, GSTIN, address and bank details so they print on every document.

Open **Company Profile** from the left menu (Company). *These details print on every invoice and quotation you generate.* Private details in the screenshots below are blurred.



1. **Company name *** – Required. Printed at the top of every document.
2. **Owner, Email, Phone, Website** – Contact details on the PDF.
3. **Address** – Full business address.
4. **City, State, Pincode, Country** – State decides CGST/SGST vs IGST.
5. **GSTIN, PAN, Place of supply** – Your tax identity. Place of supply is your home state.
6. **Logo** – PNG or JPG, up to 2 MB. Prints on the PDF header.
7. **Default signature** – Used when a document has no signature of its own.

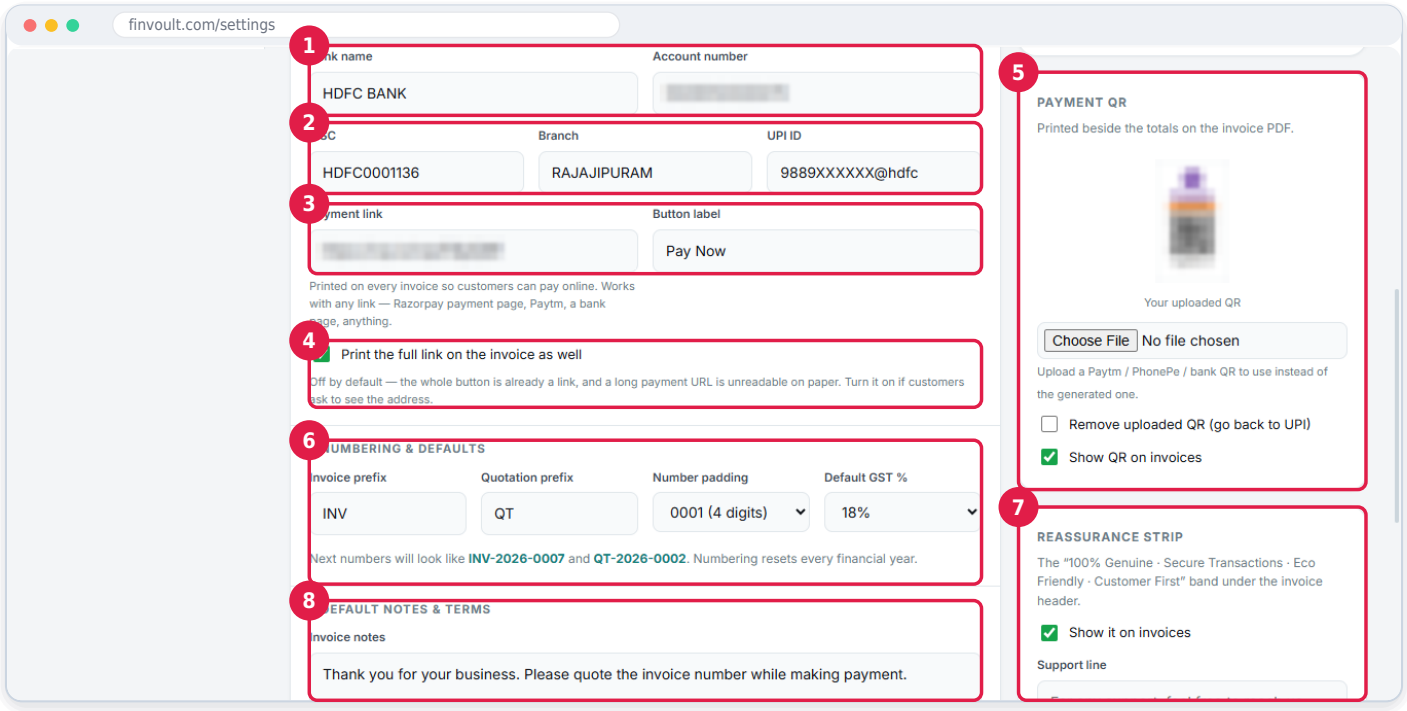
COMMON MISTAKE
A wrong GSTIN or state is the most common cause of wrong tax type on an invoice. Double-check both before your first invoice.

PRO TIP
Use a square logo with a plain background so it stays sharp on the PDF header.

NEXT STEP ▸ Bank details, payment QR and numbering.

Bank, payment link, QR and numbering

Scroll down the same Company Profile page. Account numbers, payment link and QR in this screenshot are blurred.



1. **Bank name, Account number** – Printed in the bank block of the PDF.
2. **IFSC, Branch, UPI ID** – UPI also generates a payment QR automatically.
3. **Payment link + Button label** – Works with any link: Razorpay, Paytm, a bank page. Label example: Pay Now.
4. **Print the full link** – Off by default. Turn on if customers ask to see the address.
5. **Payment QR** – Upload your own Paytm / PhonePe / bank QR. Tick "Show QR on invoices".
6. **Numbering & defaults** – Invoice prefix (INV), Quotation prefix (QT), number padding and Default GST % (18%).
7. **Reassurance strip** – The "100% Genuine · Secure Transactions · Eco Friendly · Customer First" band, plus a Support line.
8. **Default notes & terms** – Text such as "Thank you for your business" printed on invoices.

NOTE

Numbering is automatic: your next numbers look like **INV-2026-0007** and **QT-2026-0002**. Numbering restarts every financial year.

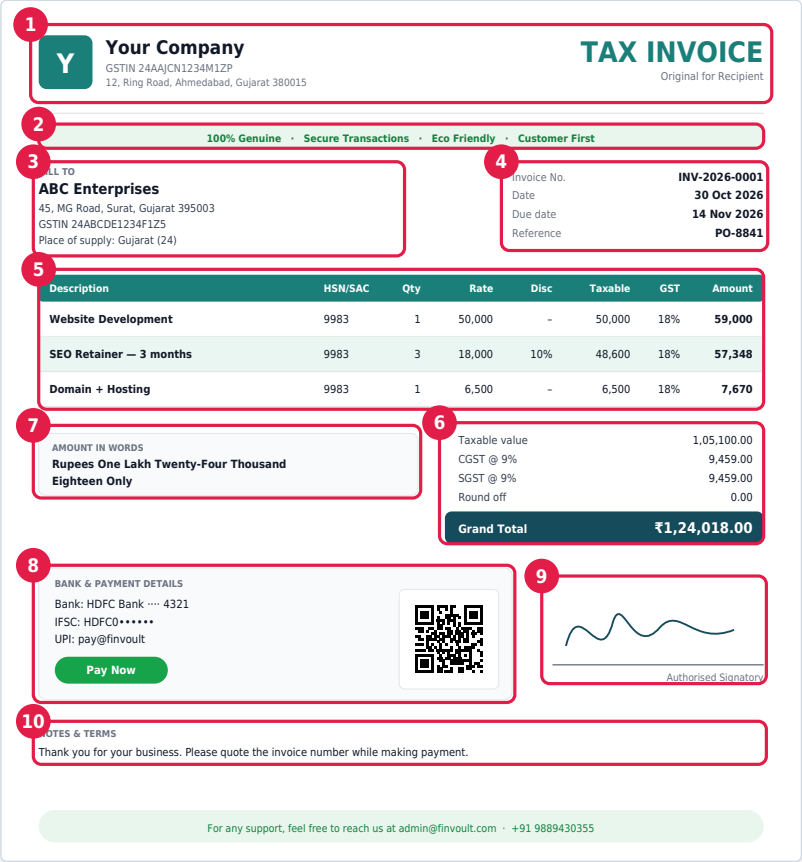
COMMON MISTAKE

Changing the prefix mid-year can confuse your records. Set it once at the start.

NEXT STEP ▸ See how these details appear on your PDF.

Where each detail appears on your invoice

Fill the profile once. Finvoult prints it on every document in the same places.



1. **Logo, company name, GSTIN** – Company Profile → Business details + Logo.
2. **Reassurance strip** – Reassurance strip setting.
3. **Bill to** – Your saved customer.
4. **Number, date, due date** – Numbering & defaults + invoice form.
5. **Item table** – Items and rates from Products & Services.
6. **Totals** – Calculated automatically.
7. **Amount in words** – Automatic.
8. **Bank, UPI, QR, Pay Now** – Bank & Payment + Payment QR.
9. **Signature** – Default signature or a signature on the document.
10. **Notes & terms** – Default notes & terms.

PRO TIP

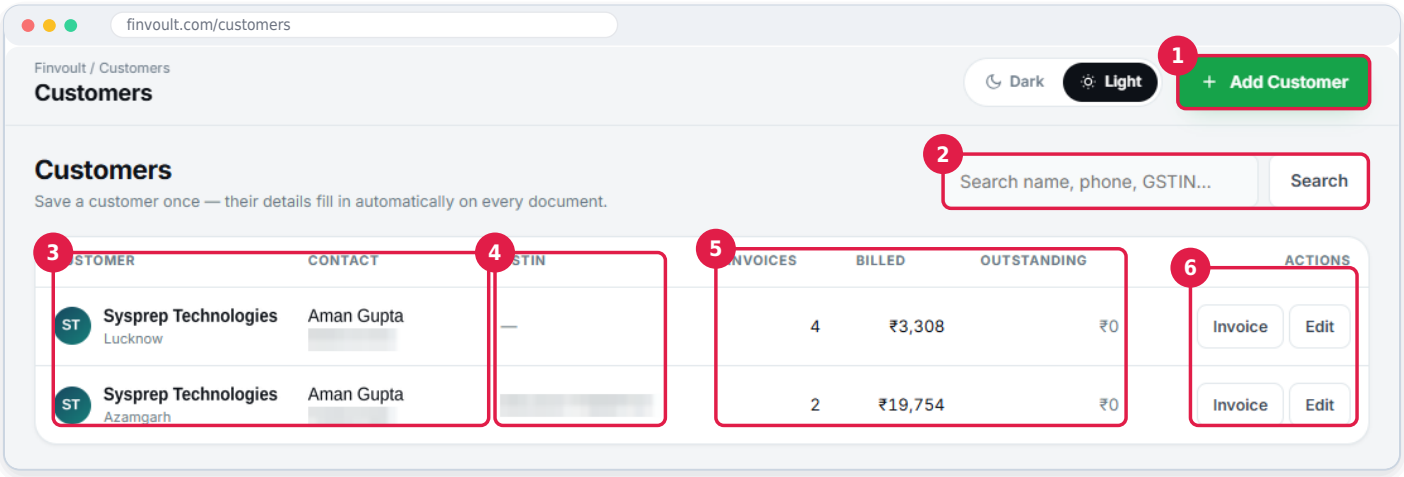
After saving your profile, open **Dashboard → Live preview → Open PDF** to see exactly how your document will look before you send it to a customer.

NEXT STEP ▸ Section 7: save your customers.

7 Saving customers

WHAT YOU WILL LEARN
Save a customer once, then pick them on every invoice and quotation. Details fill in by themselves.

Open **Customers** in the left menu. Phone numbers and GSTINs in the screenshot are blurred.



1. **Add Customer** – Starts a new customer.
2. **Search** – By name, phone or GSTIN.
3. **Customer + Contact** – Business name, city and contact person.
4. **GSTIN** – Needed for registered buyers.
5. **Invoices / Billed / Outstanding** – Count, total billed and amount still unpaid.
6. **Invoice / Edit** – Start an invoice for this customer, or edit details.

Add a customer in 3 steps

1 Click Add Customer
The green button at the top right of the Customers page.

2 Fill in the details and save
Business name, contact person, phone, GSTIN, address and city **[confirm]**. Only the name is needed to start.

3 Use them when billing
On a new invoice or quotation, pick the name. Address, GSTIN and phone fill in automatically.

PRO TIP
One company with two branches? Save each branch as its own customer (for example the same name with Lucknow and Azamgarh) so the right GSTIN and address print.

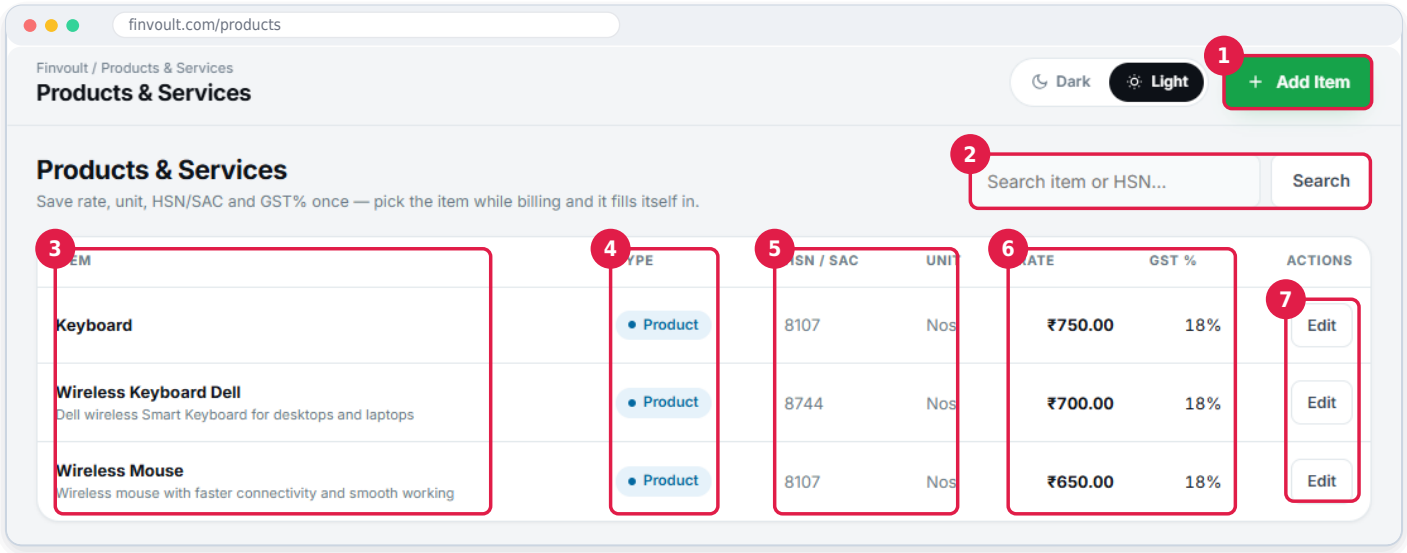
COMMON MISTAKE
Leaving GSTIN empty for a GST-registered buyer. Add it so your invoice is valid for their input credit.

NEXT STEP ▸ Section 8: save your items and services.

8 Saving items & services

WHAT YOU WILL LEARN
Save rate, unit, HSN/SAC and GST % once. Pick the item while billing and everything fills in.

Open **Products & Services** in the left menu.



1. **Add Item** – Create a product or service.
2. **Search** – By item name or HSN.
3. **Item** – Name plus a short description.
4. **Type** – Product or Service.
5. **HSN / SAC + Unit** – HSN for goods, SAC for services. Unit such as Nos.
6. **Rate + GST %** – Your selling price and tax rate (for example 18%).
7. **Edit** – Change rate, GST or description.

Add an item in 3 steps

1 Click Add Item
Top right of the page.

2 Enter name, type, HSN/SAC, unit, rate and GST %
Add a clear description – it helps customers understand the bill. Turn on **stock tracking** for goods if you use Inventory (Business plan) **[confirm]**.

3 Save, then pick it on any invoice
The rate, unit and GST fill in. You can still change them on a single invoice.

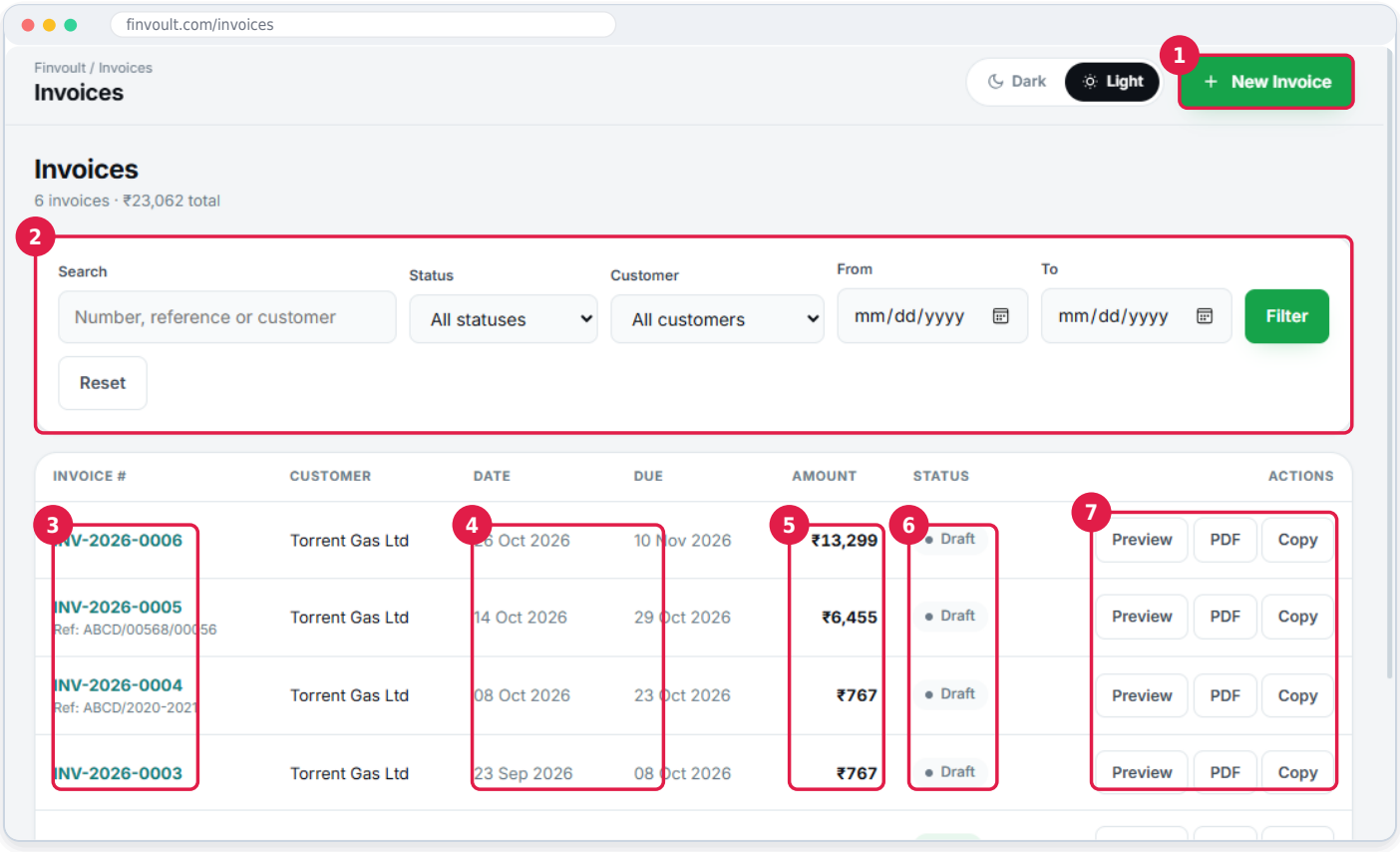
NOTE
Default GST % comes from Company Profile (18% in the example). Change it per item if your goods or services have a different rate.

COMMON MISTAKE
Typing the wrong HSN/SAC or GST %. Check with your CA if unsure – it prints on every invoice.

NEXT STEP ▸ Section 9: create your first GST invoice.

9 Creating a GST invoice

WHAT YOU WILL LEARN
Open the Invoices page, find any bill, preview it, download the PDF and copy it for repeat billing.



1. **New Invoice** – Opens the invoice form (next page).
2. **Search & filters** – Number, reference or customer; Status; Customer; From / To dates; Filter and Reset.
3. **Invoice #** – Automatic number such as INV-2026-0006, with your reference under it.
4. **Date / Due** – Issue date and payment due date.
5. **Amount** – Grand total including GST.
6. **Status** – Draft, Unpaid, Paid or Overdue.
7. **Preview / PDF / Copy** – See it, download it, or duplicate it for the next bill.

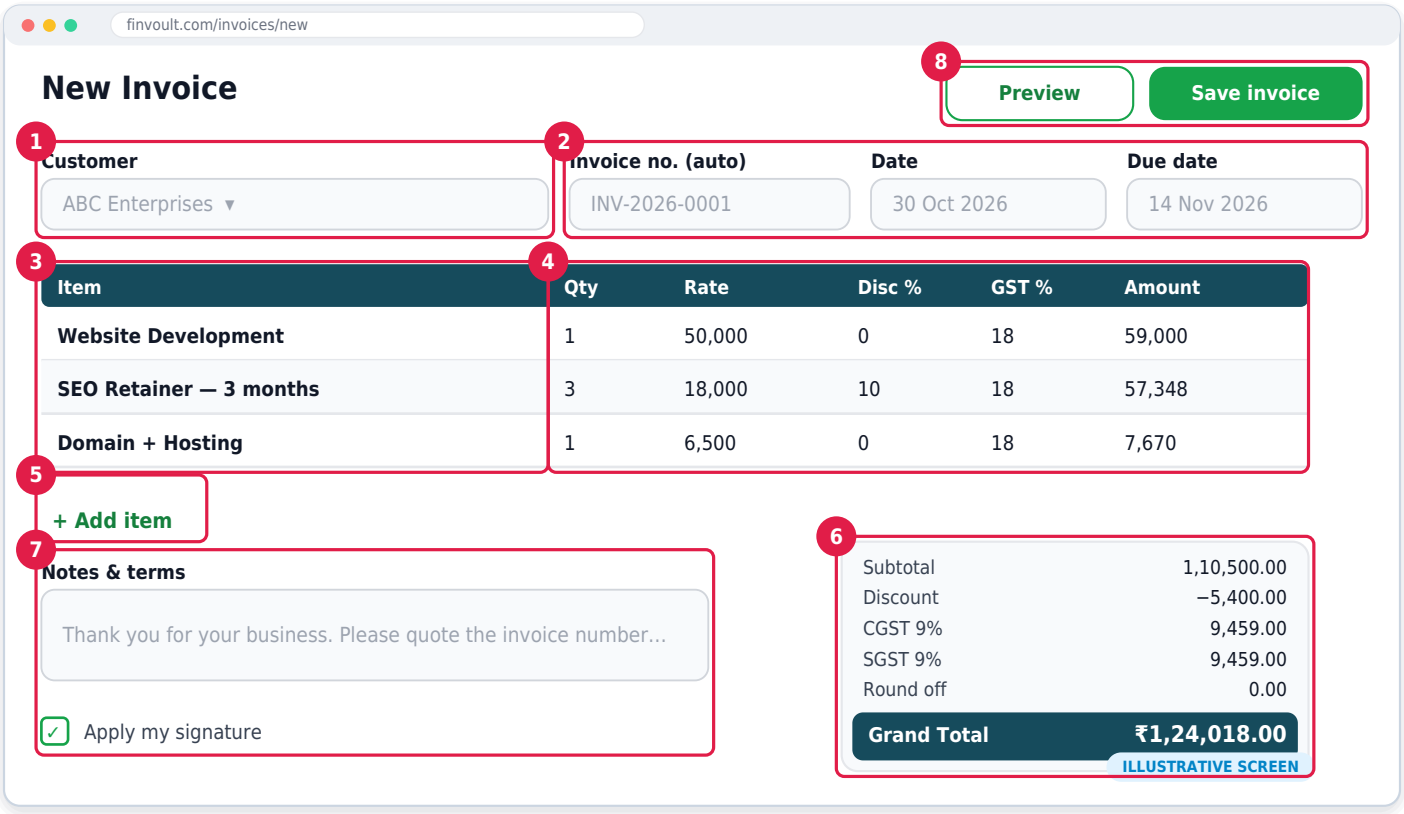
Statuses: Draft · Unpaid · Paid · Overdue — Dashboard charts use the same four statuses.

PRO TIP
Use **Copy** to repeat a monthly bill in seconds – change the date and send.

NEXT STEP ▸ Fill in the New Invoice form.

Create a new invoice

Click **New Invoice**. This layout is an illustration of the form; field names may differ slightly on your screen **[confirm]**.



1. **Customer** – Pick the saved customer; address and GSTIN fill in.
2. **Number & dates** – Invoice number is automatic. Set date and due date.
3. **Item** – Pick a saved item, or type a new line.
4. **Qty, Rate, Disc %, GST %** – Item-wise discount; GST comes from the item.
5. **Add item** – Add as many lines as you need.
6. **Totals** – Subtotal, discount, CGST/SGST or IGST, round-off and grand total.
7. **Notes & signature** – Default notes fill in; apply your signature.
8. **Preview / Save** – Check the PDF, then save. Download it from the list.

PRO TIP

Check **Preview** before sending. The preview is the exact PDF your customer will receive.

COMMON MISTAKE

Picking the wrong customer branch changes the tax type. Confirm the state before saving.

NEXT STEP ▸ How GST is calculated automatically.

How Finvoult calculates GST for you

Finvoult compares your **Place of supply** (Company Profile) with the customer's state and picks the right tax.

SAME STATE

Gujarat → Gujarat

CGST 9% + SGST 9%

= 18% in total, split equally

DIFFERENT STATE

Gujarat → Maharashtra

IGST 18%

= one tax, 18% in total

Worked example (sample data)

Three line items for ABC Enterprises, same-state sale. Item-wise discount applies to the SEO line only.

Item	Qty	Rate (₹)	Discount	Taxable (₹)	GST 18% (₹)	Amount (₹)
Website Development	1	50,000	–	50,000	9,000	**59,000**
SEO Retainer — 3 months	3	18,000	10%	48,600	8,748	**57,348**
Domain + Hosting	1	6,500	–	6,500	1,170	**7,670**
Total				**1,05,100**	**18,918**	**1,24,018**

Tax split	Same state	Different state
CGST 9%	9,459.00	–
SGST 9%	9,459.00	–
IGST 18%	–	18,918.00
Grand total	**₹1,24,018.00**	**₹1,24,018.00**

AMOUNT IN WORDS

Rupees One Lakh Twenty-Four Thousand Eighteen Only

ROUND-OFF

If a total has paise, Finvoult shows a Round off line so the grand total is a clean rupee amount **[confirm]**.

NOTE

Everything above is automatic: item-wise discount, CGST/SGST or IGST, round-off and amount in words – "so nothing is ever off by a rupee".

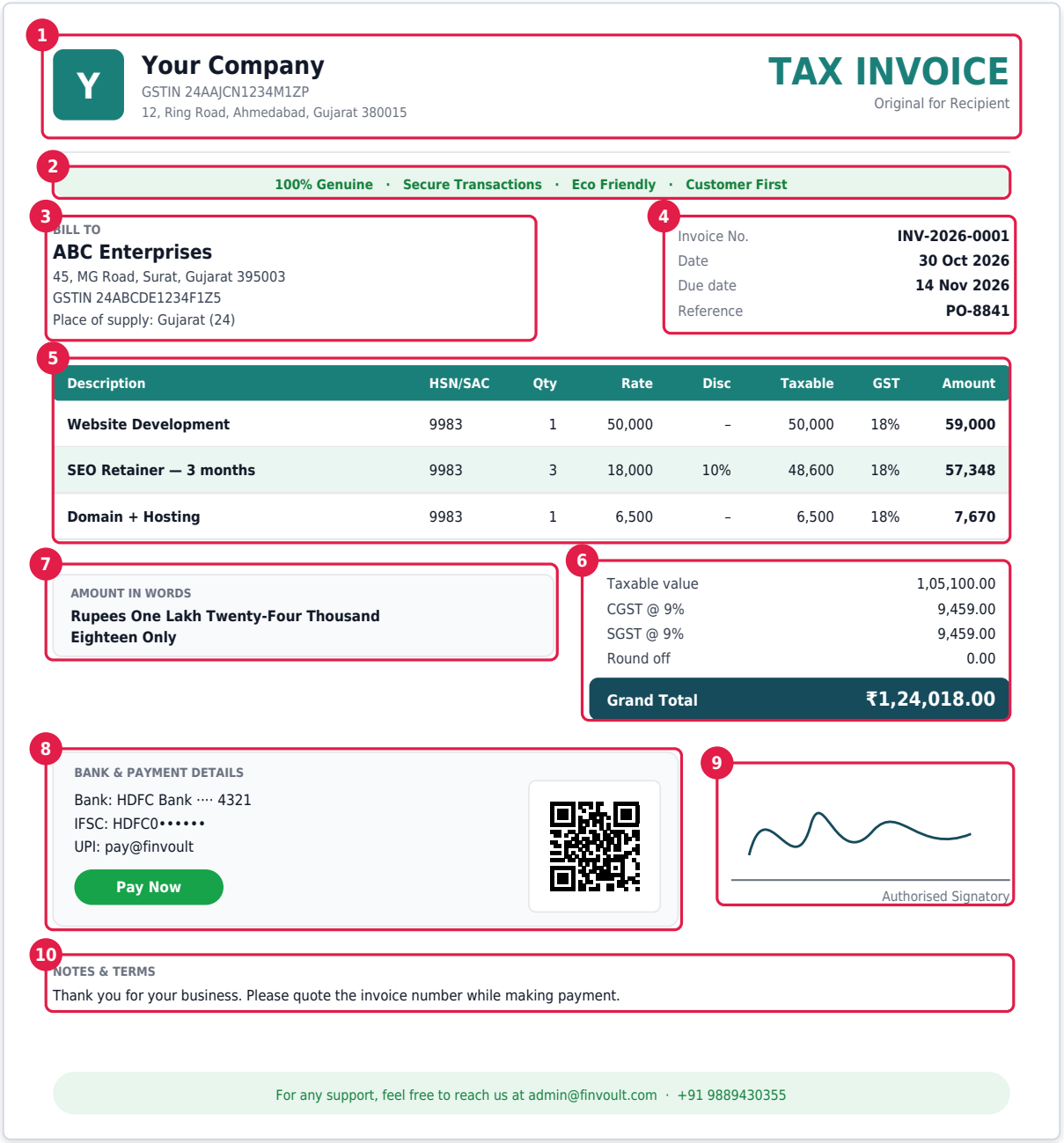
COMMON MISTAKE

Wrong **Place of supply** in Company Profile makes every invoice show the wrong tax type. Set it once, correctly.

NEXT STEP ▸ See a complete sample invoice with every part labelled.

A finished GST invoice, part by part

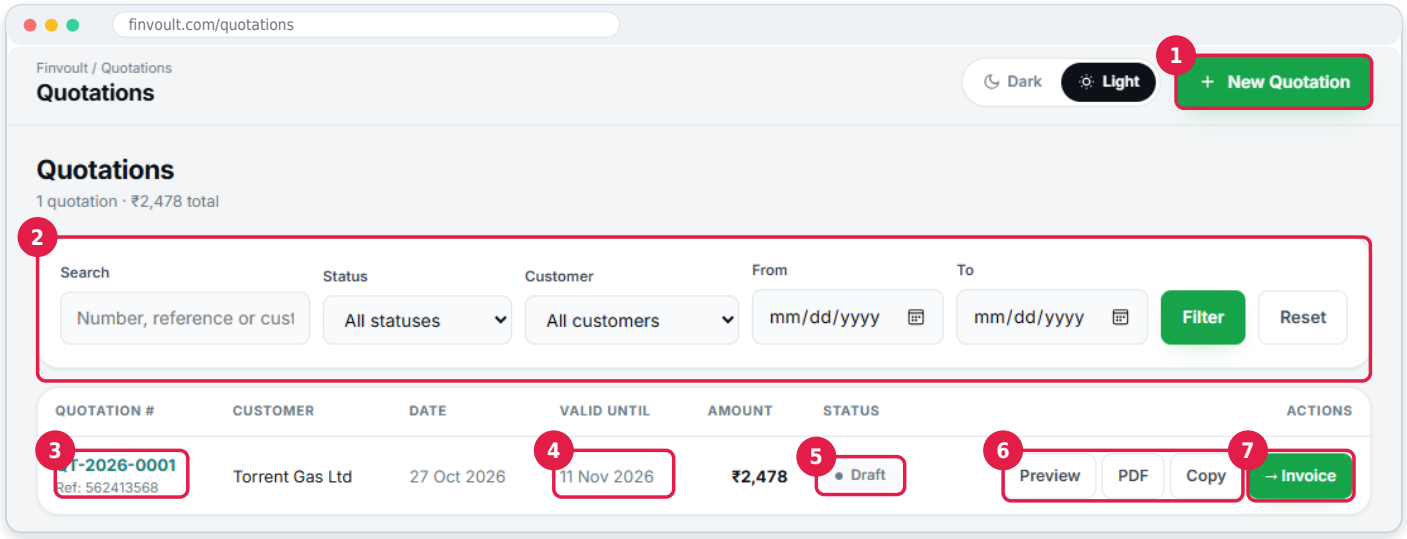
Sample document with test data. Your own logo, GSTIN, bank details and signature appear in the same places.



1. **Header** – logo, company, GSTIN
2. **Trust strip** – optional band
3. **Bill to** – customer + place of supply
4. **Number & dates** – invoice no., date, due
5. **Items** – qty, rate, discount, GST
6. **Totals** – taxable, CGST/SGST, total
7. **Words** – amount in words
8. **Payment** – bank, UPI, QR, Pay Now
9. **Signature** – authorised signatory
10. **Notes** – terms and support line

10 Quotations that become invoices

WHAT YOU WILL LEARN
Send a quotation, and when the client approves it, turn it into an invoice with one click.



1. **New Quotation** – Create a quote for a customer.
2. **Filters** – Search, Status, Customer, From / To.
3. **Quotation #** – Number such as QT-2026-0001 with your Ref.
4. **Valid until** – The date the offer expires.
5. **Status** – Starts as Draft.
6. **Preview / PDF / Copy** – Check, download or duplicate.
7. **→ Invoice** – Converts the quote to an invoice.

QUOTATION
QT-2026-0001
Draft · ₹2,478

→

CLIENT APPROVES
Click → Invoice
one click

→

INVOICE
INV-2026-0007
all line items carried over

1 Click New Quotation

Pick the customer, add items and set a **Valid until** date. The sample shows a validity of 15 days **[confirm]**.

2 Preview, download the PDF and send it

Apply your digital signature before sending (Section 11).

3 When the client says yes, click → Invoice

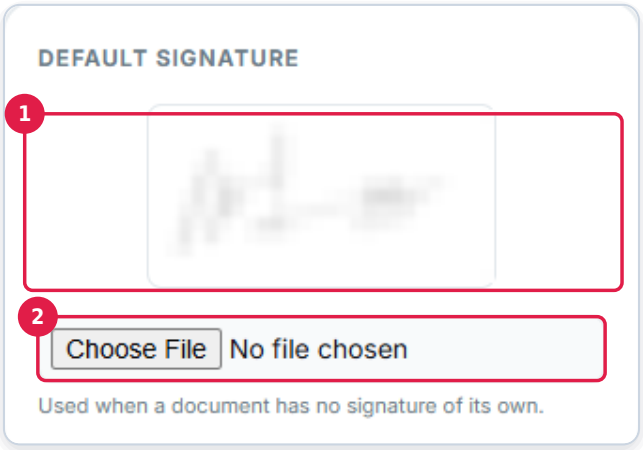
A new invoice opens with every line item already filled in.

PRO TIP
Use **Copy** to make a revised quote quickly when the client asks for changes.

NEXT STEP ▸ Section 11: add a digital signature.

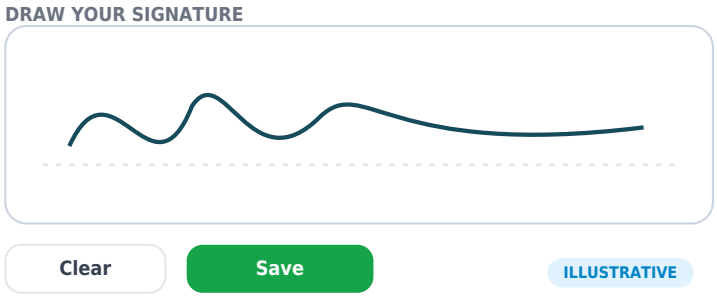
11 Digital signature

WHAT YOU WILL LEARN
Set up a signature once and apply it to any invoice or quotation before you send it.



Company Profile → Default signature (your signature is blurred here).

1. **Signature box** – Shows the saved default signature.
2. **Choose File** – Upload an image of your signature. “Used when a document has no signature of its own.”



1 Save a default signature

Open **Company Profile**, scroll to **Default signature**, click **Choose File** and upload your signature image.

2 Or draw it

Draw your signature with mouse, trackpad or finger and save it **[confirm]**.

3 Apply it before sending

Add the signature to any invoice or quotation before you download or share it.

4 Check the preview

It prints above “Authorised Signatory” in the bottom right of the PDF.

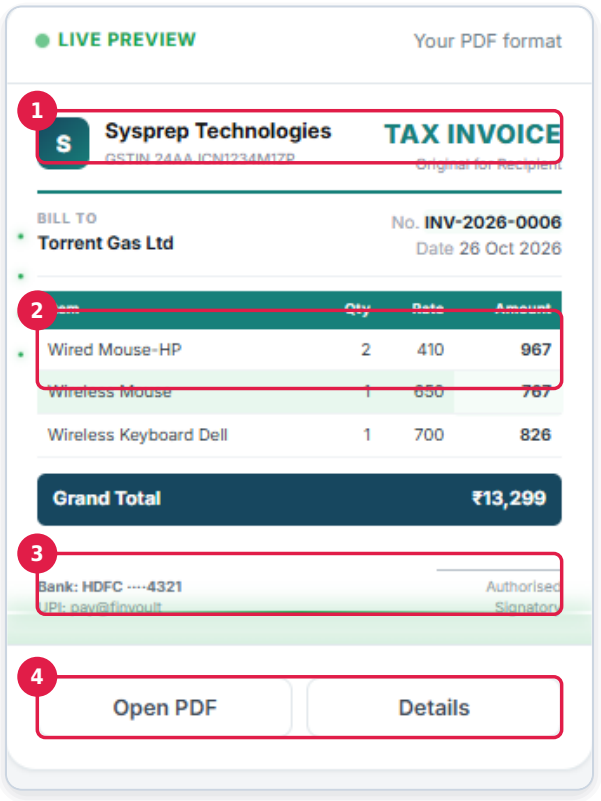
PRO TIP
Sign on white paper with a dark pen, photograph it in daylight and crop tightly. A transparent PNG looks cleanest.

COMMON MISTAKE
Uploading a huge photo of a whole page. Crop to the signature so it stays sharp and small.

NEXT STEP ▸ Section 12: make the PDF look like your brand.

12 Professional PDF customisation

WHAT YOU WILL LEARN
Make every document look like your brand: logo, colour, bank details, QR, signature and notes.



Dashboard → Live preview: "Your PDF format".

1. **Header** – Logo, company name and GSTIN.
2. **Item table** – Your items with GST.
3. **Payment** – Bank, UPI, Pay Now and QR.
4. **Open PDF / Details** – Preview the real document any time.

What to change	Where
Logo (PNG/JPG, 2 MB)	Company Profile → Logo
Accent colour	Company Profile **[confirm]**
Bank & UPI	Company Profile → Bank & payment
Payment link & button	Company Profile → Payment link
Payment QR	Company Profile → Payment QR
Numbering prefix	Company Profile → Numbering
Notes & terms	Company Profile → Default notes

Your invoice is ready to send when…

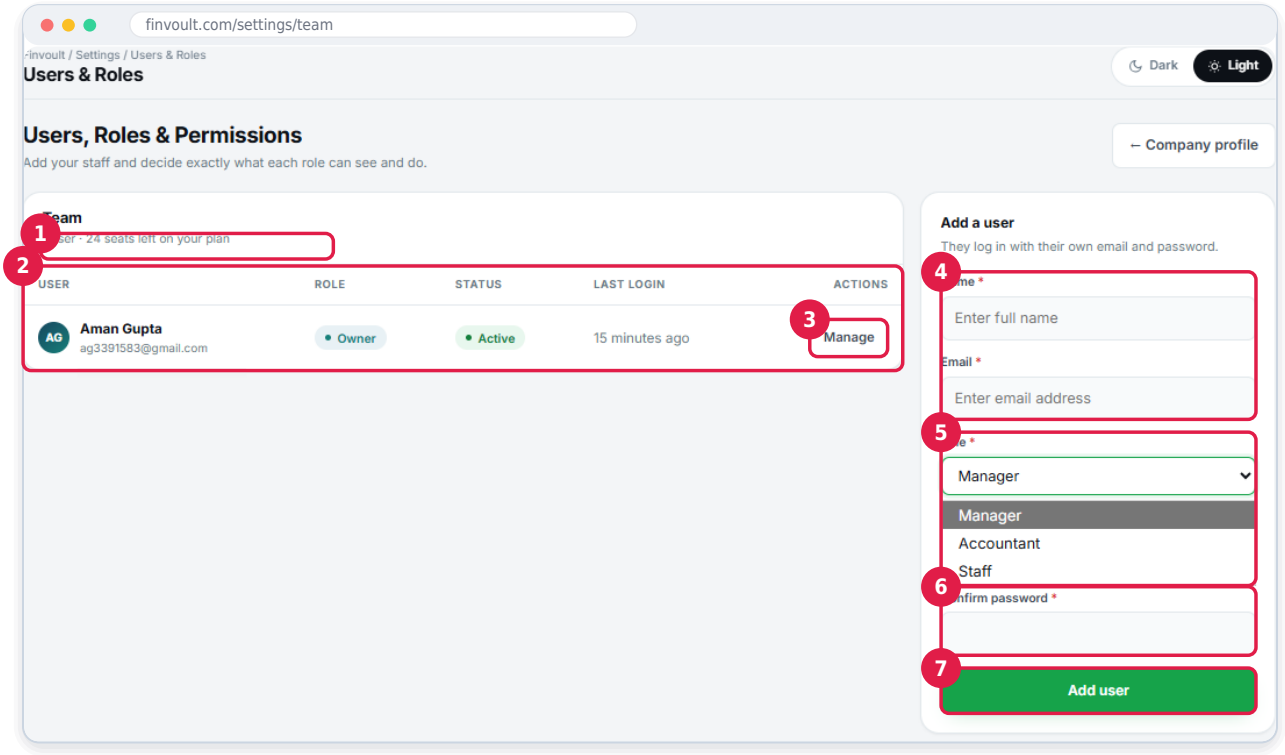
- ☑ Logo and company name look sharp in Live preview
- ☑ Bank name, IFSC, UPI and payment link are filled in
- ☑ Default notes and terms say what you want
- ☑ GSTIN, address and Place of supply are correct
- ☑ QR is shown and scans correctly
- ☑ Signature appears above "Authorised Signatory"

PRO TIP
Print a test invoice to PDF and check it on your phone too. If something looks off, fix it once in Company Profile and every future document is right.

NEXT STEP ▸ Section 13: add your team.

13 Team roles & permissions

WHAT YOU WILL LEARN
Add staff with their own login and decide what each role can see and do.



1. **Seats** – Users and seats left on your plan.
2. **Team table** – User, Role, Status, Last login.
3. **Manage** – Edit a user or role.
4. **Name & Email** – New user's details.
5. **Role** – Manager, Accountant or Staff.
6. **Passwords** – They log in with their own email.
7. **Add user** – Creates the login.

Suggested access (you decide in the **Permissions** section lower on the same page) **[confirm]**

Area	Owner	Manager	Accountant	Staff
Invoices & quotations	✓	✓	✓	✓
Customers & items	✓	✓	✓	View
Inventory & expenses	✓	✓	✓	–
Credit & debit notes	✓	✓	✓	–
Company profile	✓	View	–	–
Plan & billing	✓	–	–	–
Users & roles	✓	–	–	–

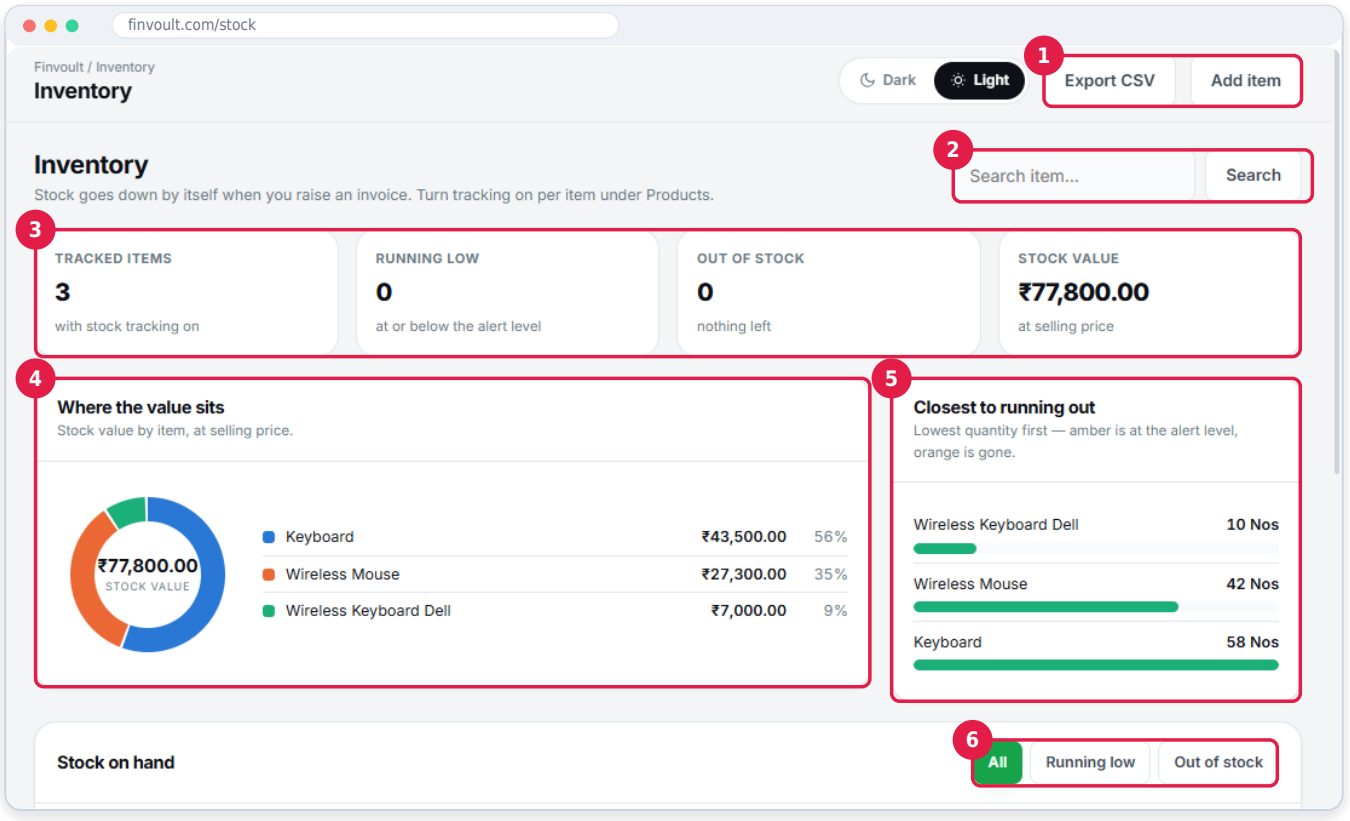
NEXT STEP ▸ Section 14: inventory, expenses, credit & debit notes.

14 Inventory, expenses, credit & debit notes

WHAT YOU WILL LEARN
Business-plan modules: track stock, record spending, and adjust issued bills. First up: Inventory.

BUSINESS+

Inventory — menu: Inventory



1. **Export CSV / Add item** – Download stock data or add an item.
2. **Search** – Find an item quickly.
3. **Summary cards** – Tracked items, Running low, Out of stock, Stock value.
4. **Where the value sits** – Stock value by item at selling price.
5. **Closest to running out** – Lowest quantity first; amber = alert level, orange = gone.
6. **Stock on hand** – Tabs: All, Running low, Out of stock.

How inventory works

1 Turn tracking on per item

Go to **Products & Services**, edit an item and switch on stock tracking **[confirm]**. Only tracked items appear here.

2 Raise invoices as usual

Stock goes down by itself when you raise an invoice. No manual entry.

3 Watch Running low and Out of stock

Restock before an item reaches zero.

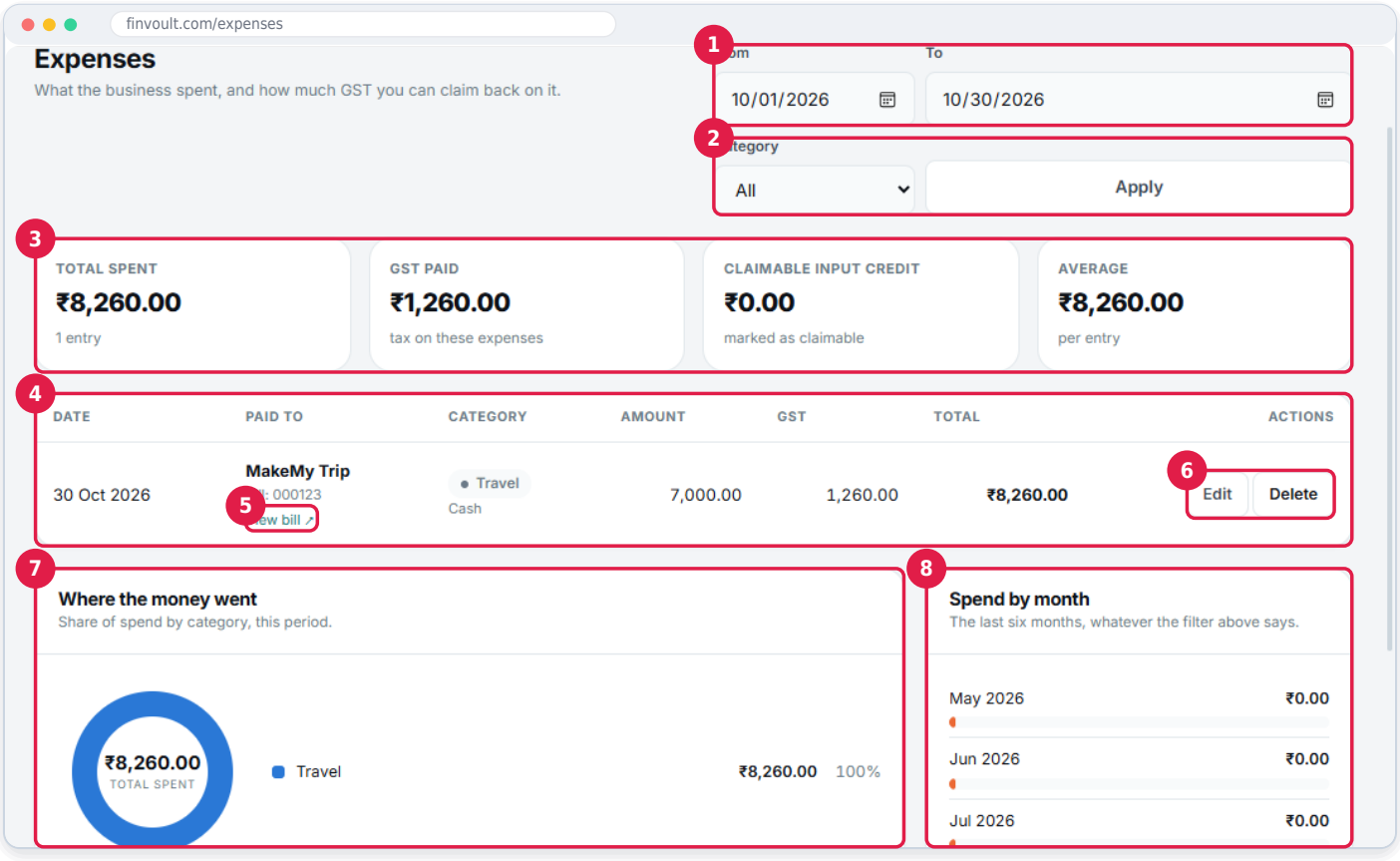
PRO TIP
Check **Closest to running out** every Monday. It is the quickest way to know what to reorder.

NEXT STEP ▸ Expense tracker.

BUSINESS+

Expense tracker — menu: Expenses

What the business spent, and how much GST you can claim back on it.



1. **Date range** – From and To dates.
2. **Category + Apply** – Filter by category, then click Apply.
3. **Summary cards** – Total spent, GST paid, Claimable input credit, Average.
4. **Expense list** – Date, Paid to, Category, Amount, GST and Total.
5. **View bill** – Opens the attached bill.
6. **Edit / Delete** – Correct or remove an entry.
7. **Where the money went** – Share of spend by category.
8. **Spend by month** – The last six months.

Record an expense

1 Add the expense

Enter date, who you paid, category, amount and GST **[confirm]**. Attach the bill so you can find it later.

2 Mark GST as claimable if it qualifies

This feeds **Claimable input credit**. Ask your CA if you are unsure what qualifies.

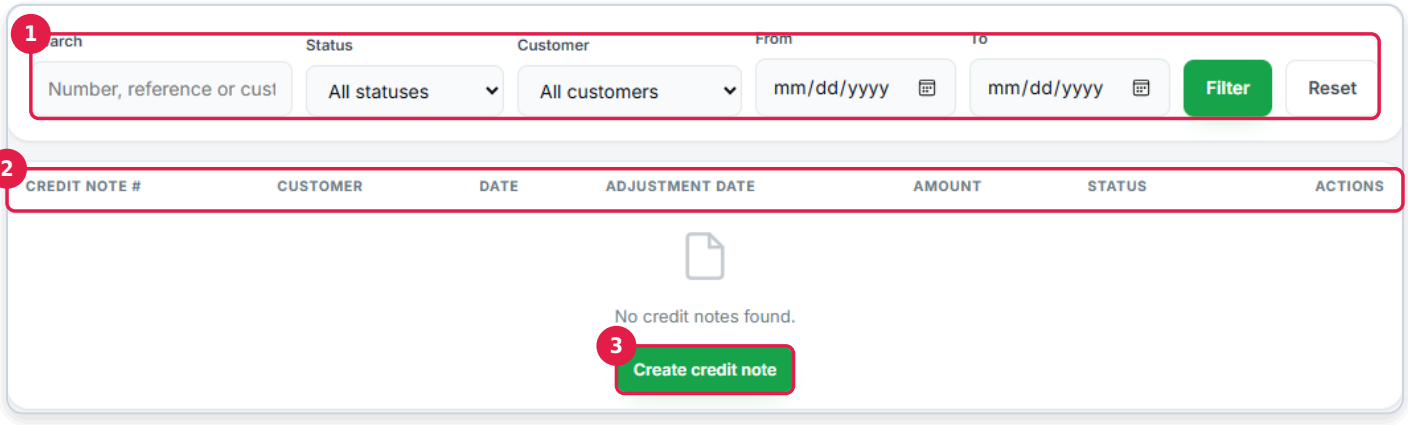
> **PRO TIP**
> Record expenses the same day. A weekly review of **Where the money went** shows where costs creep up.

NEXT STEP ▸ Credit and debit notes.

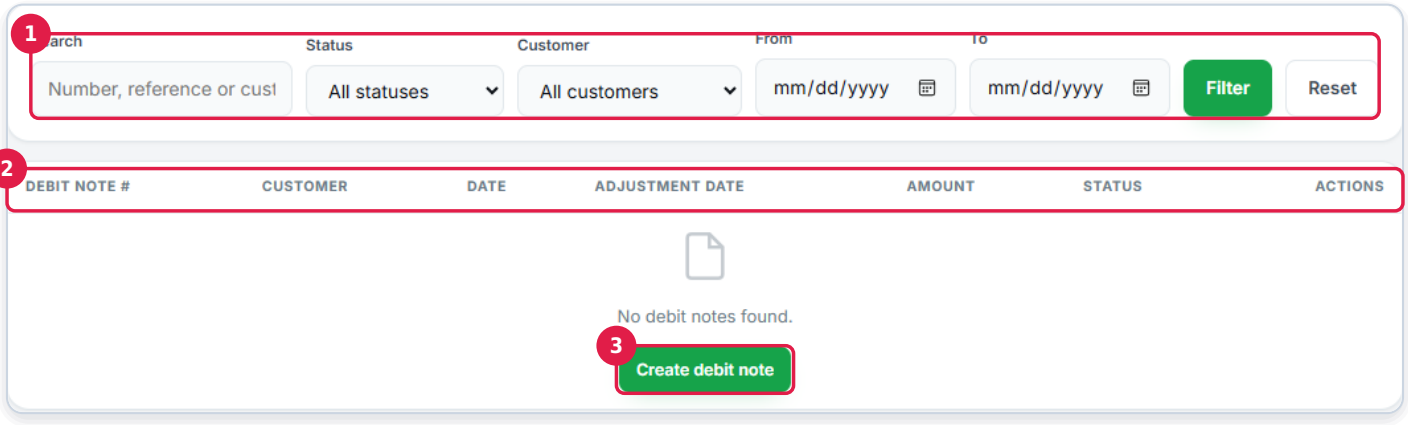
BUSINESS+

Credit & debit notes — menu: Credit Notes, Debit Notes

CREDIT NOTES — click “New Credit Note” (top right) or “Create credit note”



DEBIT NOTES — click “New Debit Note” (top right) or “Create debit note”



1. **Filters** – Search by number, reference or customer; Status; Customer; From / To dates.
2. **Columns** – Note #, Customer, Date, Adjustment date, Amount, Status, Actions.
3. **Empty state button** – Create your first note right from the empty list.

CREDIT NOTE — reduces a bill

Goods returned, a price reduced, or you charged too much on an issued invoice.

DEBIT NOTE — increases a bill

Extra charges, a price rise, or you undercharged on an issued invoice.

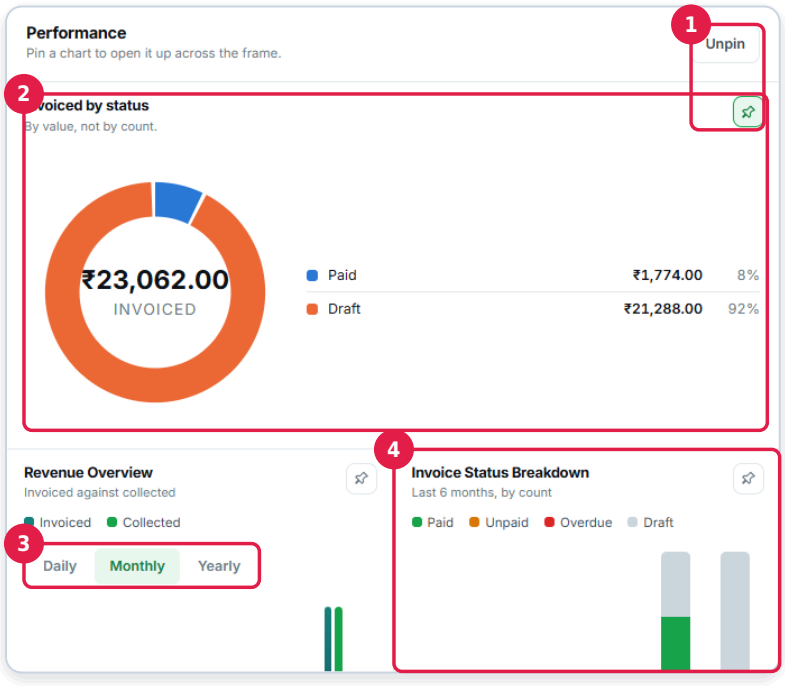
NOTE

Link each note to the original invoice and keep the **Adjustment date** accurate. Ask your CA about time limits for GST adjustments.

NEXT STEP ▸ Section 15: analytics, reports and CSV export.

15 Analytics, reports & CSV export

WHAT YOU WILL LEARN
Read your revenue and status charts, pin the one you need, and export your records.

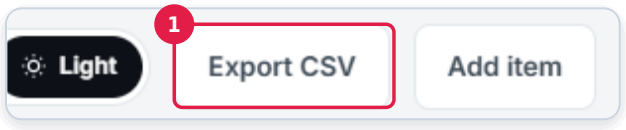


1. **Pin / Unpin** – Pin a chart to open it across the frame; Unpin to close it.
2. **Invoiced by status** – Donut by value: Paid vs Draft (value, not count).
3. **Daily / Monthly / Yearly** – Switch the Revenue Overview period.
4. **Invoice Status Breakdown** – Paid, Unpaid, Overdue and Draft over the last 6 months, by count.

Which chart answers which question?

Question	Where to look
How much have I billed?	Dashboard → Invoiced by status (donut)
Am I getting paid?	Dashboard → Revenue Overview: Invoiced vs Collected
Who owes me?	Customers → Outstanding column
What is overdue?	Dashboard → Invoice Status Breakdown → Overdue
Where does my money go?	Expenses → Where the money went
What is low on stock?	Inventory → Closest to running out

Export your records to CSV



CSV export is included on every plan. In **Inventory** click **Export CSV** to download your stock list for Excel or your accountant. Look for the same option on other lists **[confirm]**.

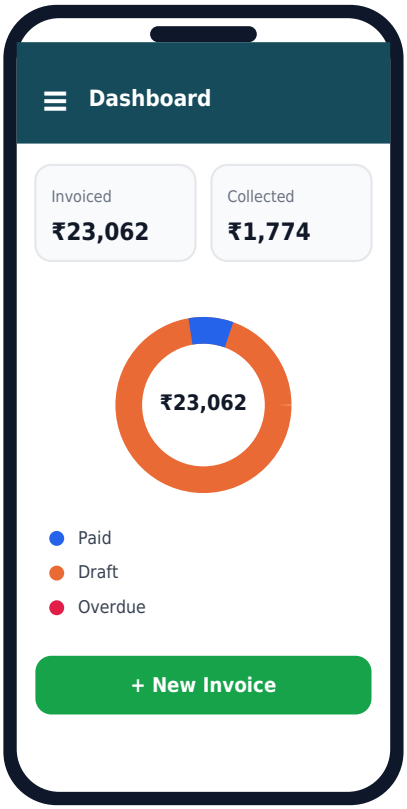
PRO TIP
Share the Customers list and the CSV exports with your CA at month-end. It saves hours of data entry.

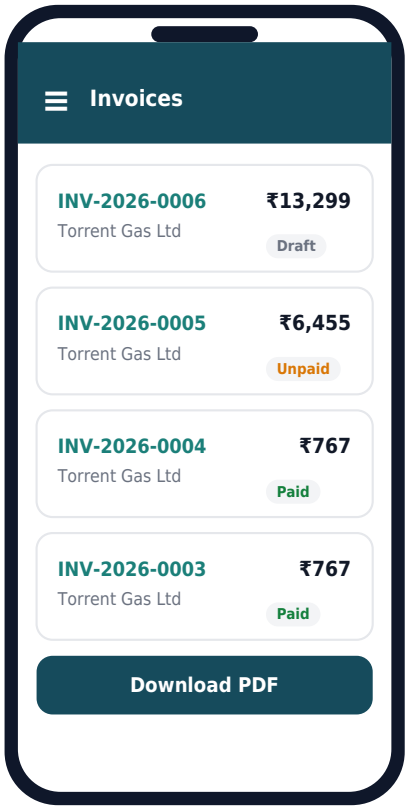
NOTE
Dashboard numbers update as you create, send and mark documents as paid.

NEXT STEP ▸ Section 16: using Finvoult on mobile.

16 Using Finvoult on mobile

WHAT YOU WILL LEARN
Create and share invoices from your phone – finvoult.com is built to work on mobile browsers.





ILLUSTRATIVE SCREENS

Open in your browser
Go to finvoult.com and log in. No app download is needed.

Share the PDF
Download the PDF, then share it on WhatsApp or email.

Everything works
Invoices, quotations, customers, items and the dashboard.

Add to home screen
Save the site as an icon on your phone for one-tap access **[confirm]**.

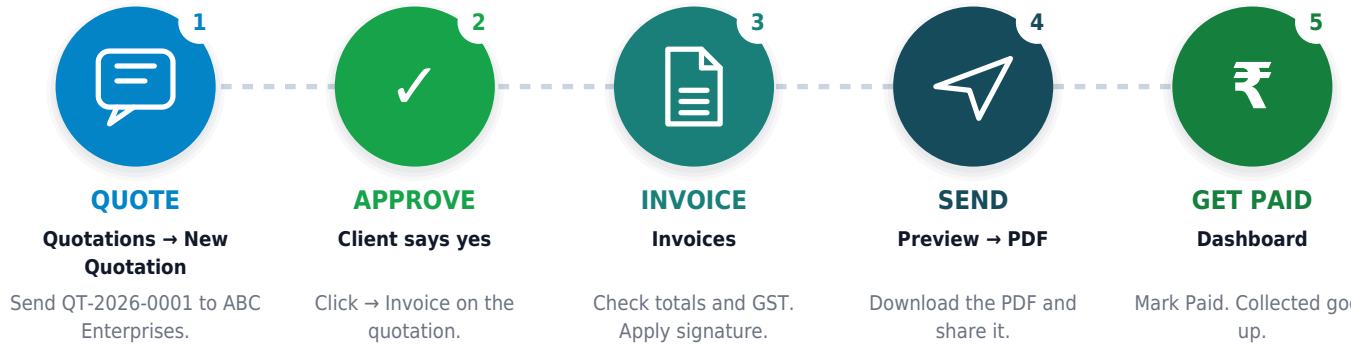
PRO TIP
Landscape mode gives wide tables like the invoice list more room on small phones.

NOTE
On small screens the left menu collapses behind the ≡ button **[confirm]**.

NEXT STEP ▸ Section 17: a typical day with Finvoult.

17 A day in the life: quote to payment

WHAT YOU WILL LEARN
See how a real job flows through Finvoult from the first quote to money in the bank.



A sample week

When	What happens	Where in Finvoult
Mon, 10:00	ABC Enterprises asks for a website, SEO and hosting. You send a quotation.	Quotations → New Quotation → PDF
Wed, 15:30	Client approves. You convert it to an invoice with one click.	Quotations → → Invoice
Wed, 15:40	You check the GST split, apply your signature, preview and download the PDF.	Invoices → Preview → PDF
Wed, 16:00	You share the PDF on WhatsApp. The invoice shows as Unpaid.	Invoices list → Status
Next Tue	Payment arrives through UPI or Pay Now. You mark the invoice as Paid.	Invoices → Status; Dashboard → Revenue
Month-end	You check Outstanding, export CSV and share it with your CA.	Customers, Dashboard, Export CSV

Status journey Draft → Unpaid → Paid or Overdue

PRO TIP
Create the invoice the same day the work is approved. Faster invoices mean faster payment.

NEXT STEP ▸ FAQs, troubleshooting and the GST checklist.

18 FAQs, troubleshooting & GST checklist

WHAT YOU WILL LEARN
Quick answers to the questions we hear most, plus fixes for common problems.

Q Is there a free plan?
Yes. Free is ₹0 forever: 10 documents a month and 2 users, no credit card needed.

Q What counts as a document?
Invoices and quotations you create each month count towards the limit. Credit and debit notes **[confirm]**.

Q Can I add my logo and colour?
Yes, on every plan: logo and accent colour on the PDF.

Q Does Finvoult calculate GST?
Yes. CGST/SGST or IGST, item-wise discount, round-off and amount in words are automatic.

Q Can I turn a quotation into an invoice?
Yes. Click → Invoice. Every line item carries over.

Q How many people can use my account?
Free: 2 users, Business: 5, Enterprise: 25. Roles: Manager, Accountant, Staff.

Q Does stock reduce automatically?
Yes, for tracked items, when you raise an invoice (Business plan and above).

Q Can I export my data?
Yes. CSV export of records is on every plan.

Q Does it work on mobile?
Yes. Use finvoult.com in your phone's browser.

Q Is my data private?
Finvoult states that your data stays private. For details, read the privacy policy.

Q Can you move my old invoices?
Ask us via Talk to us on finvoult.com. We can help with moving them over **[confirm]**.

Q When does numbering restart?
Every financial year. Prefixes are INV and QT by default and you can change them.

NOTE
Still stuck? Email **admin@finvoult.com** or call/WhatsApp **+91 9889430355**. We usually reply within one working day.

Troubleshooting

Problem	Likely cause	Fix
Wrong tax type (IGST vs CGST/SGST)	Place of supply or customer state is wrong	Check Company Profile → Place of supply, and the customer's state
Invoice number looks wrong	Prefix or padding was changed	Company Profile → Numbering & defaults
Logo does not show on the PDF	File is not PNG/JPG or is over 2 MB	Upload a smaller PNG or JPG
QR or Pay Now missing	"Show QR on invoices" is off or no payment link	Tick the option and fill the payment link
Cannot add another user	You reached your plan's seats	Check Users & Roles seats; upgrade if needed
Cannot create more documents	Free plan limit of 10 a month reached	Upgrade in Plan & Billing
Stock does not go down	Stock tracking is off for the item	Products & Services → turn tracking on **[confirm]**
Staff cannot see a menu	Role permissions hide it	Users & Roles → Permissions
Forgot password	Login problem	Use the reset link **[confirm]** or email admin@finvoult.com

GST invoice checklist – common mistakes to avoid

A tax invoice should carry these details. Finvoult prints most of them for you; you provide the data. Confirm turnover-specific rules with your CA.

- [ ] Your business name, address and **GSTIN**
- [ ] Customer name, address and **GSTIN** (if registered)
- [ ] Description, quantity and unit of every item
- [ ] Correct tax: **CGST + SGST** or **IGST**, with rate and amount
- [ ] Total and amount in words
- [ ] Bank / payment details so you get paid
- [ ] A unique, sequential **invoice number** and date
- [ ] **HSN/SAC** code for each item
- [ ] Taxable value after any discount
- [ ] **Place of supply** / state
- [ ] Authorised signature
- [ ] Credit or debit note for any later change

COMMON MISTAKE

Common mistakes: wrong state, missing GSTIN of a registered buyer, wrong HSN/SAC, editing a sent invoice instead of issuing a credit or debit note, and skipping numbering.

NEXT STEP ▸ Your one-page quick start.

19 Quick-start cheat sheet

WHAT YOU WILL LEARN
Five steps from zero to a sent invoice. Keep this page handy.

1 Create your account

finvoult.com → Create free account → business name, name, email, password.

2 Fill your Company Profile

Logo, GSTIN, address, state, bank, UPI, QR, numbering, default signature.

3 Add customers and items

Customers → Add Customer. Products & Services → Add Item (HSN/SAC, rate, GST %).

4 Create the invoice

Invoices → New Invoice → pick customer → add items → Preview → Save.

5 Send and track

Download PDF → share on WhatsApp or email → watch status: Draft, Unpaid, Paid, Overdue.

PLANS

Free ₹0: 10 docs, 2 users

Business ₹499/mo: 250 docs

Enterprise ₹1,499/mo: unlimited

REMEMBER

Numbers: INV- and QT-

State decides CGST/SGST or IGST

Copy a bill to repeat it

GET HELP

admin@finvoult.com

+91 9889430355 (call / WhatsApp)

Request a demo on finvoult.com

20 Support & request a demo

WHAT YOU WILL LEARN
Talk to a real person, book a demo, or learn more from our blog and videos.

Email
admin@finvoult.com
Reply within one working day

Phone & WhatsApp
+91 9889430355
Call or WhatsApp 9889430355

Office
C-4354, First Floor, Sector-12
E-Block Rajajipuram, Lucknow, UP-226017

Request a demo or a callback

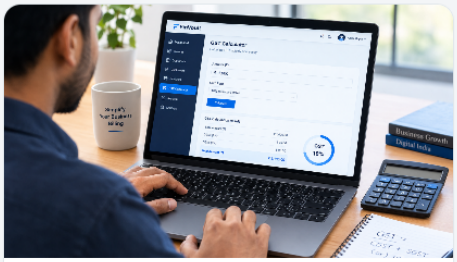
Use **Talk to us** and choose **Request a demo**, then mention a time that suits you. Or use **Request a callback** near the bottom of finvoult.com: add your contact name, phone, email, company, job title, company size, product or service, budget and expected close date.

From the blog

Practical notes on GST, billing and running a small business in India – finvoult.com/blog



MSME Amendment Act 2026: 7 Major Changes Every Indian Business Owner Should Know
Explore 7 major changes under the MSME Amendment Act 2026, including registration, TReDS payments, compliance penalties and delayed payment reforms.
30 Oct 2026 · Aman Gupta · 10 min read

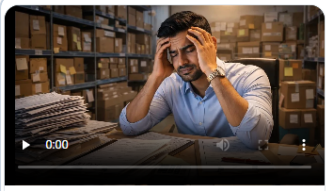


GST Invoice Rules in India 2026: Mandatory Fields, Time Limits & Common Mistakes
Learn GST invoice rules in India for 2026, including mandatory invoice details, issue deadlines, GST calculations, e-invoicing and common mistakes.
22 Oct 2026 · Aman Gupta · 10 min read



GST Invoice Format in India: Sample, Required Details and Example (2026)
Learn the mandatory details required on a GST tax invoice under Rule 46—including GSTINs, HSN/SAC codes, and tax breakdowns (CGST/SGST/IGST). Understand the difference between a Tax Invoice and a Bill of Supply, avoid common billing errors, and simplify your entire invoicing workflow with Finvoult.
16 Oct 2026 · Aman Gupta · 8 min read

See it in action



Finvoult intro
Invoices and quotations, done in under a minute.



Finvoult- Problems & Resolutions
Every business faces challenges in managing invoices, quotations, expenses and daily operations. FinVoult turns these everyday business problems into smarter, simpler solutions with automated invoicing, professional quotations and efficient business management tools. Less Manual Work. More Business

Finvoult intro – invoices and quotations, done in under a minute.

Problems & Resolutions – how Finvoult turns everyday billing problems into simpler solutions with automated invoicing, professional quotations and business management tools.

Find both at the bottom of finvoult.com under **See it in action**.

Finvoult

Invoices and quotations, done in under a minute.

Scan to create your free account

finvoult.com/register

admin@finvoult.com · +91 9889430355

C-4354, First Floor, Sector-12, E-Block Rajajipuram, Lucknow, UP-226017

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