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**GST Genie – R**  
**Android Tablet Application**  
*User Manual*  
Version 1.0

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**WeP Digital Services Limited**

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## Login Screen

Login Screen is the first screen, when application launches. User can login the application by entering valid credentials. Default Login credential are:

**Username: admin**

**Password: admin**

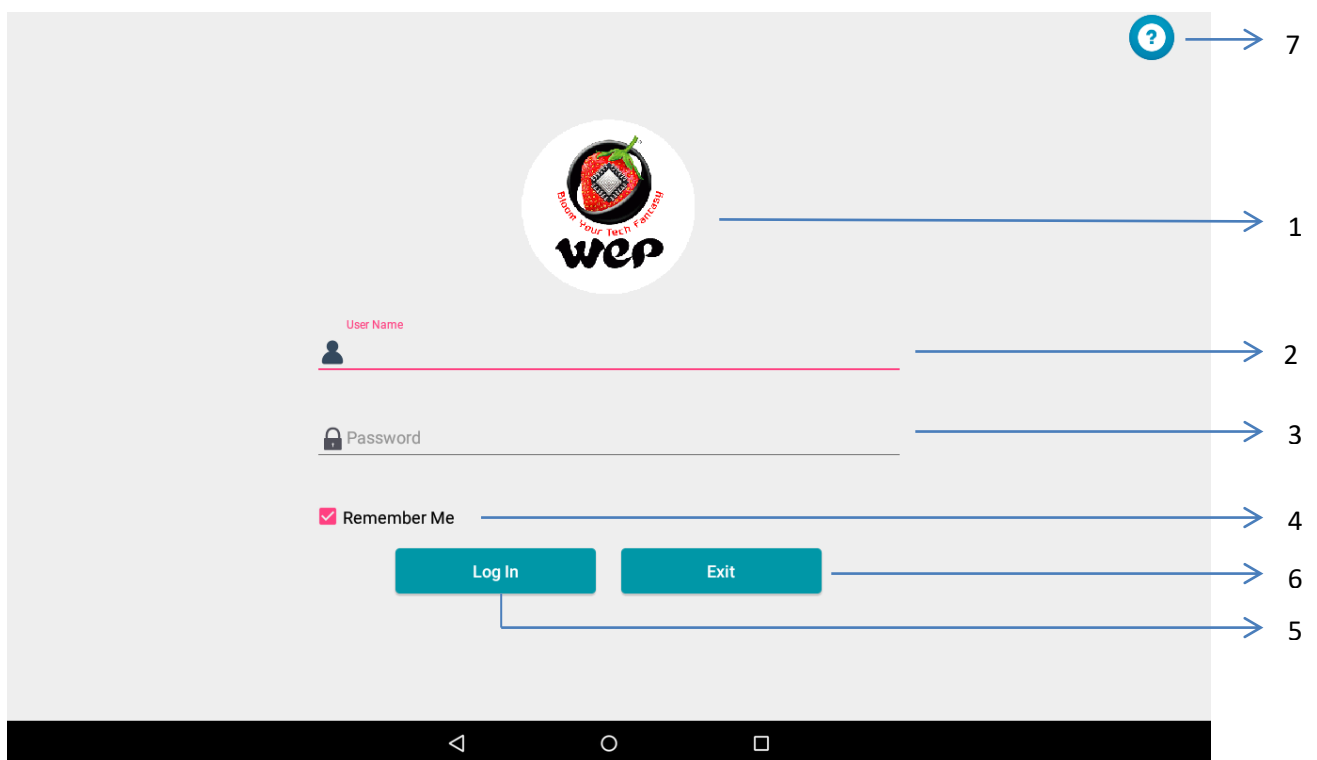


Figure 1: Login Screen

Label	Field	Description
1	WeP Logo	Click on WeP logo to get information about the application like app version and organization.
2	Username	User has to enter his username as configured in the application
3	Password	User has to enter his password relevant to his username.



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4	Remember me	If user selects remember me option then on re launching of app, the app will automatically populate the last username used for login in username field.
5	Log in	Log in button to enter into the application if login credentials are valid.
6	Exit	To exit from the system.
7	Help	User can access Quick start guide and User manual

## 1.2 WeP Logo

On clicking on WeP logo, user will get all the information about the current version of application running on device and about the Organization, e.g.: WeP Solutions Limited.

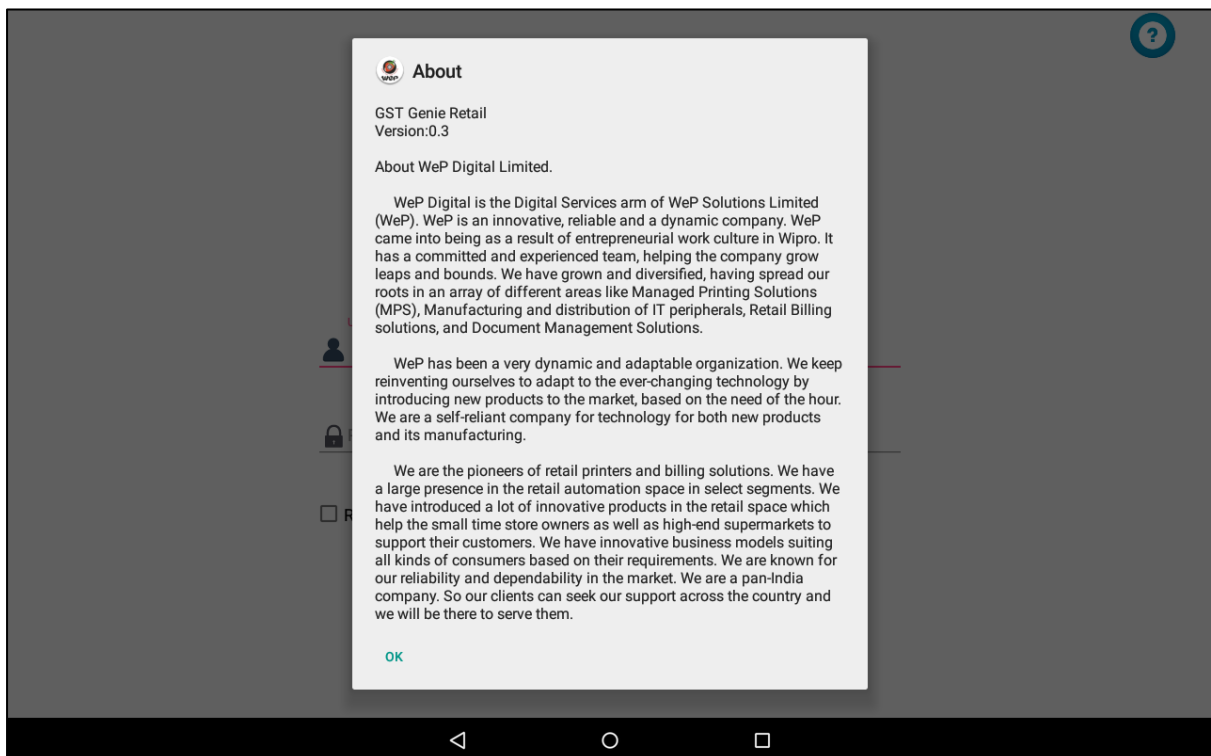


Figure 2: About



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### 1.3 Get Quick Start Guide & User Manual

On clicking on Help button, user can download useful documents which can help user in using the application with ease.

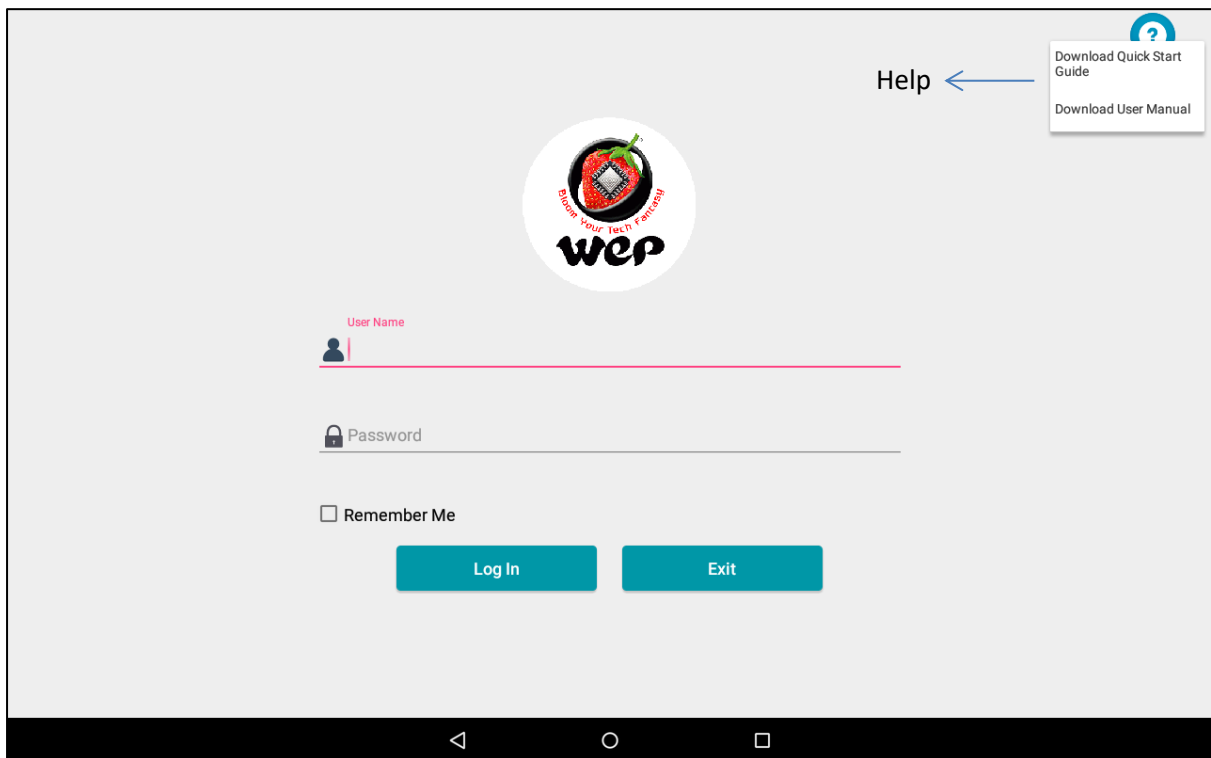


Figure 3: Download Quick start Guide & User Manual

User can access these document once download from internal memory > WeP\_Retail\_Documents.

### 1.4 Navigation Drawer and Menus

Once user logs in to the application with valid credentials, user will be navigated to the billing screen and from there user can access Navigation drawer and menus which will allow user to navigate to other modules. Modules which are restricted to particular roles will be disabled in navigation drawer.





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Figure 4: Menus

Label	Field	Description
1	Navigation Drawer	It will allow user to navigate to other modules.
2	Settings	Opens up application settings. <a href="#">See Details</a> in Section 12.
3	Log out	Logs out from the application.

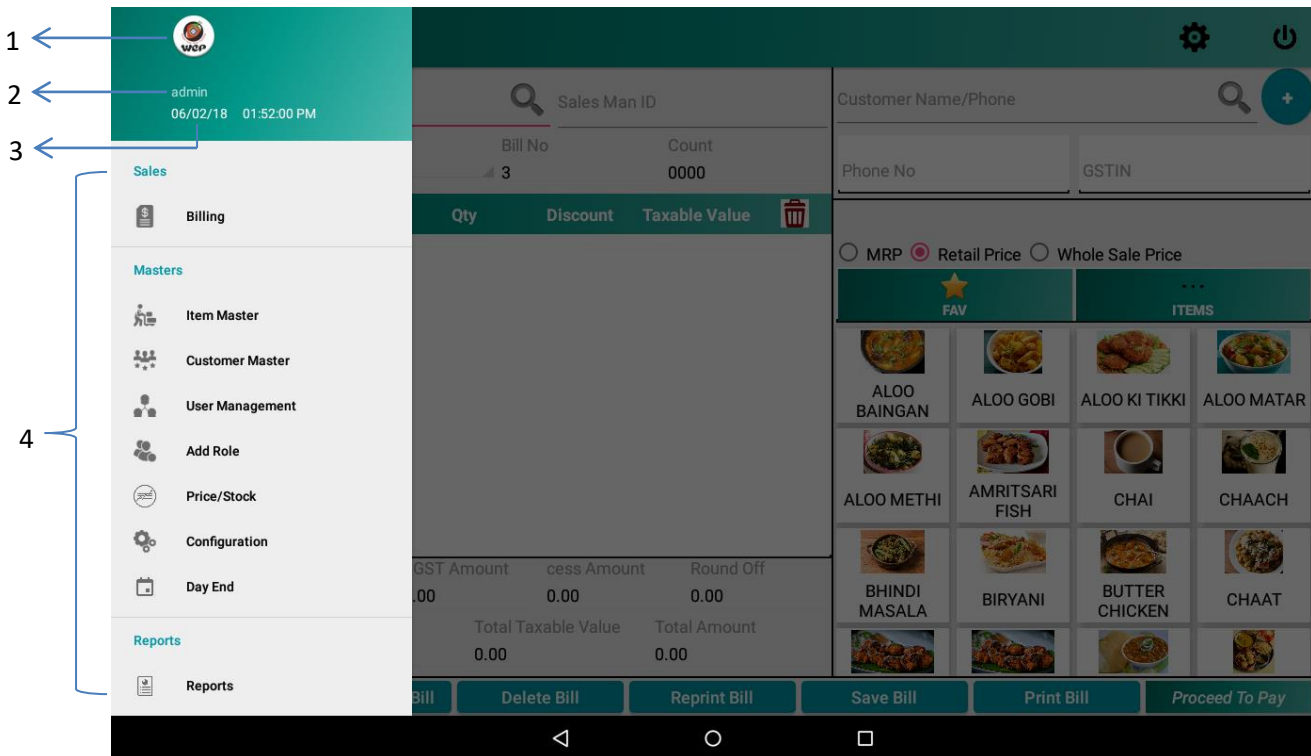


Figure 5: Navigation Drawer

Label	Field	Description
1	WeP Logo	WeP Logo.



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2	User Name	Name of the user who logged into the application.
3	System Date & Time	System Date & Time
4	Modules	Various modules.

## 1. Billing Screen

Billing module provides user to make bills and payments for the bill generated. It also allows user to add a new customer while billing itself.

The screenshot shows the Billing screen interface. Callouts 1-22 point to the following elements:

- 1: Customer Name (Sachin Verma)
- 2: Price selection (MRP, Retail Price, Whole Sale Price)
- 3: Phone No (9876543201) and GSTIN (09ANTPA0870E1Z6)
- 4: Add Customer (+)
- 5: Price selection (MRP, Retail Price, Whole Sale Price)
- 6: Item selection (FAV, ITEMS)
- 7: Item selection (ALOO METHI, AMRITSARI FISH, CHAI, CHAACH)
- 8: Sales Man ID
- 9: Barcode or ItemName
- 10: Barcode or ItemName
- 11: Bill No (3)
- 12: InterState (Uttar Pradesh 09)
- 13: Item list (ALOO BAINGAN MASALA, ALOO GOBI, ALOO KI TIKKI, ALOO MATAR, ALOO METHI, AMRITSARI FISH)
- 14: Count (8)
- 15: Summary table (IGST Amount, CGST Amount, SGST Amount, cess Amount, Round Off, Discount, Other Charges, Total Taxable Value, Total Amount)
- 16: Clear button
- 17: Hold/Resume Bill button
- 18: Delete Bill button
- 19: Reprint Bill button
- 20: Save Bill button
- 21: Print Bill button
- 22: Proceed To Pay button

Figure 6: Billing Screen

Label	Field	Description
1	Name	Customer's name. User can also search his



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		customer through his name & mobile number. If any record exists of the customer corresponding to that name or mobile number the data in fields 1, 2 and 3 will automatically be populated.
2	Mobile number	Customer's mobile number.
3	GSTIN	Customer's GSTIN.
4	Add	If no customer record exists corresponding to the name or mobile number entered then user can add a new customer by clicking on the "+" button after filling all the mandatory details of the customer.
5	MRP/Retail Price/Whole Sale Price	User can choose one price out of three to be applied while billing.
6	Favourite/Items	Allows user to switch between favourite items and all items list.
7	Items List	List of the items to be chosen by user for billing (Favourite or All Items).
8	Sales Man ID	Sales Man ID. This field will be visible only if selected enabled in Settings. <a href="#">See Details</a> in Section 12.3
9	Bill number	Shows which bill number it is.
10	Barcode or Item Name	User can search for an item by its name, short code or barcode.
11	Count	Number of items in order list.
12	Interstate	If user is supplying items out of the state, then he has to check the Interstate checkbox and select the state to which he is supplying his items. <i>Note: IGST will be applied.</i>
13	Order List	The list shows the selected items that customer wants to buy. Items can be added and removed from the list before printing/paying for the bill.



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14	Delete All Items	Deletes all item from order list.
15	Delete an Item	Deletes particular item from order list.
16	Clear	Clear all the details and fields from billing screen
17	Hold/Resume Bill	User can put a bill on hold and resume it again. <a href="#">See Details</a> in Section 2.1.
18	Delete Bill	Deletes the existing bill from the database by bill date and bill number. Deleting a bill requires manager's credentials. <a href="#">See details</a> in Section 2.2
19	Reprint Bill	User can reprint an existing bill by the date on bill that bill has been generated & the bill number. <a href="#">See details</a> in Section 2.3
20	Save Bill	Saves the bill only. In this case the payment method will be Cash by default.
21	Print Bill	Saves and Print the bill only. In this case the payment method will be Cash by default.
22	Proceed To Pay	Provide various modes of payment. e.g.: credit card, e-Wallet. <a href="#">See Detail</a> in Section 3

### 1.1 Multiple items with same name & barcode with different MRPs

User can add two or more items having same name and barcode, but MRPs should be different. Now it will be ambiguous for user to add that item into order list through searching it by name or barcode. To remove that ambiguity and to choose the right item user can select anyone of the items from search and then application will ask the user to choose one MRP. Then user can select the required item with required MRP.



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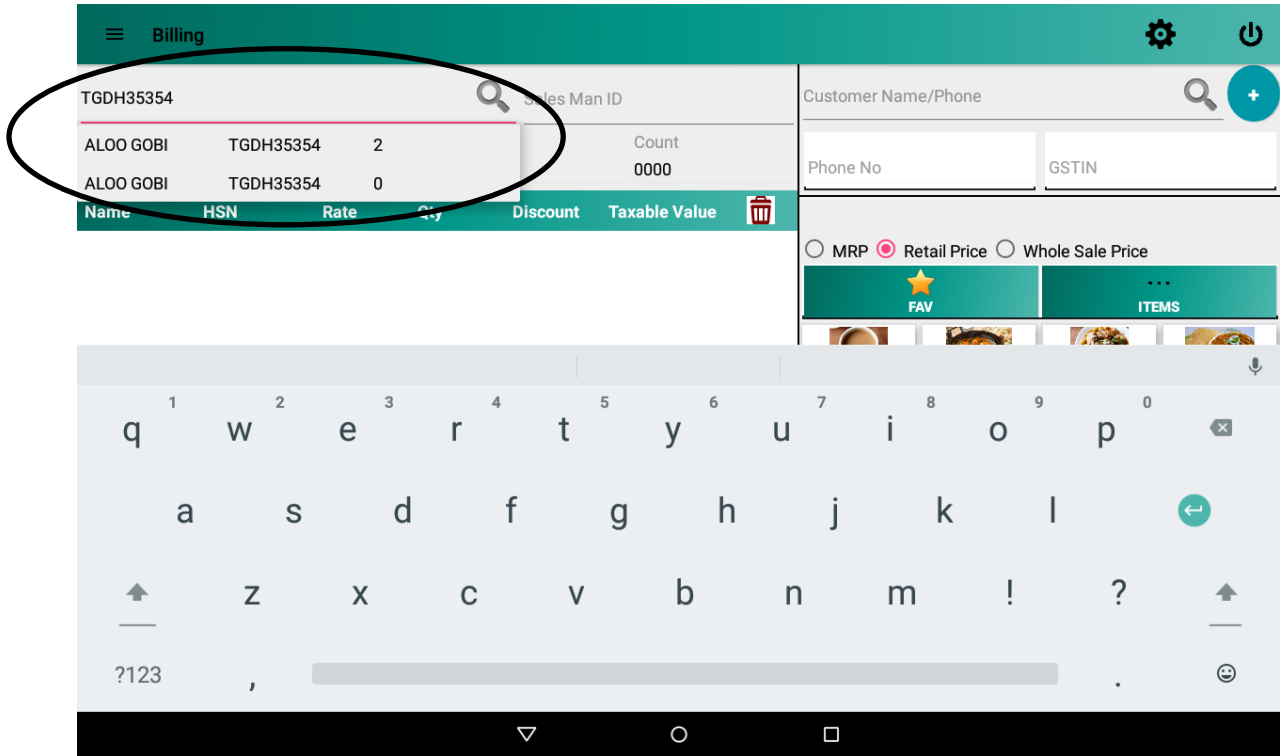


Figure 7: Multiple items with same name and barcode

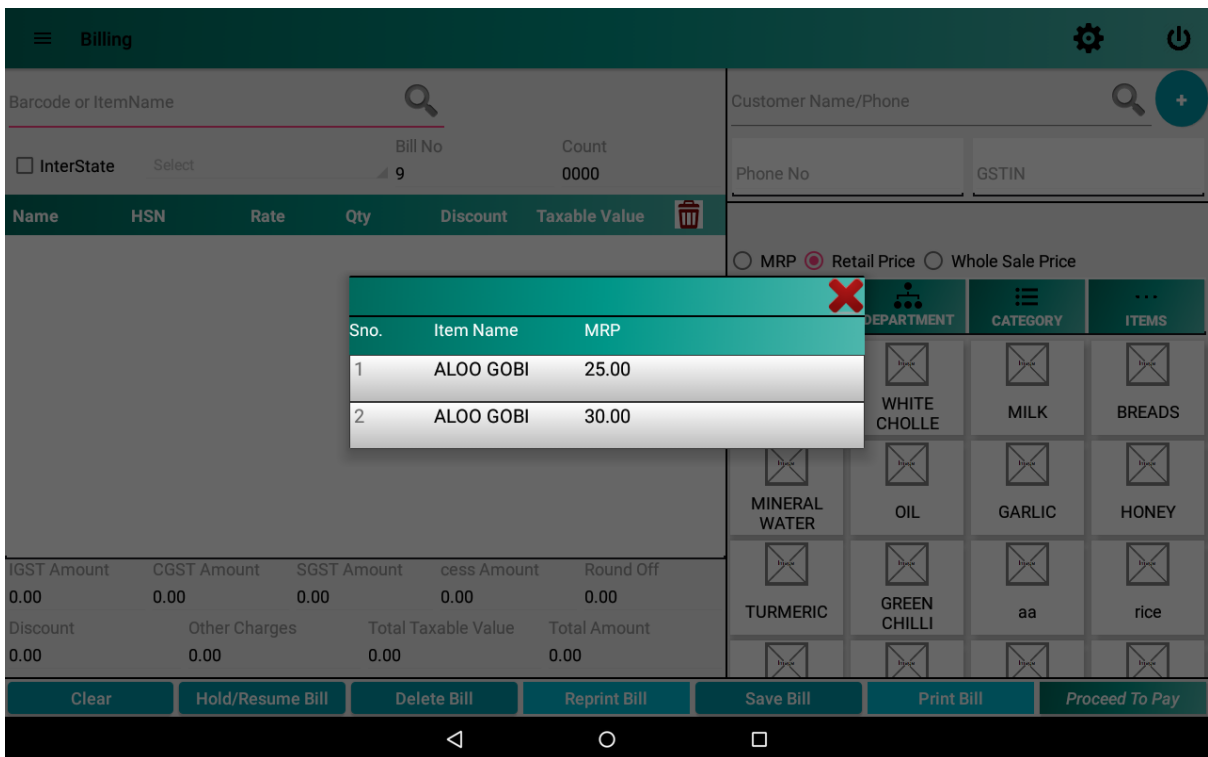


Figure 8: Select the required item with required MRP



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## 1.2 Hold & Resume Bill

Hold and resume bill allows user to put a bill of a customer on hold and can edit it again by resuming it.

The screenshot shows the 'Billing' screen in the WeP application. At the top, there's a search bar for 'Barcode or ItemName' and 'Sales Man ID'. The sales man's name is 'Sachin Verma'. Below this, there are fields for 'InterState' (checked), 'Uttar Pradesh 09', 'Bill No' (3), and 'Count' (4). A table lists items with columns for Name, HSN, Rate, Qty, Discount, Taxable Value, and a delete icon. All items have a red 'X' icon, indicating they are on hold. The items are: ALOO BAINGAN MASALA, AMRITSARI FISH, ALOO METHI, and ALOO GOBI. To the right, there are fields for 'Phone No' (9876543201) and 'GSTIN' (09ANTPA0870E1Z6). Below these are radio buttons for 'MRP', 'Retail Price' (selected), and 'Whole Sale Price'. A grid of food items is visible, including ALOO BAINGAN, ALOO GOBI, ALOO KI TIKKI, ALOO MATAR, ALOO METHI, AMRITSARI FISH, CHAI, CHAACH, BHINDI MASALA, BIRYANI, BUTTER CHICKEN, and CHAAT. At the bottom, there are buttons for 'Clear', 'Hold/Resume Bill', 'Delete Bill', 'Reprint Bill', 'Save Bill', 'Print Bill', and 'Proceed To Pay'. A summary table at the bottom left shows tax amounts and totals.

Name	HSN	Rate	Qty	Discount	Taxable Value
ALOO BAINGAN MASALA	HSN1	28.0	1.0	2.0	28.0
AMRITSARI FISH	HSN8	80.6	2.0	0.0	161.2
ALOO METHI	HSN5	12.0	1.0	0.0	12.0
ALOO GOBI	HSN2	45.0	1.0	3.0	45.0

IGST Amount	CGST Amount	SGST Amount	cess Amount	Round Off
7.39			5.20	0.00
Discount	Other Charges	Total Taxable Value	Total Amount	
5.00	10.00	246.20	268.78	

Figure 9: Hold/Resume Bill

Now to check or resume a bill which was put on hold click on Hold/Resume Bill button *with empty order list* otherwise the current order will be put on hold.

1. First add items in order list.
2. Click on Hold/Resume button to put the order on hold



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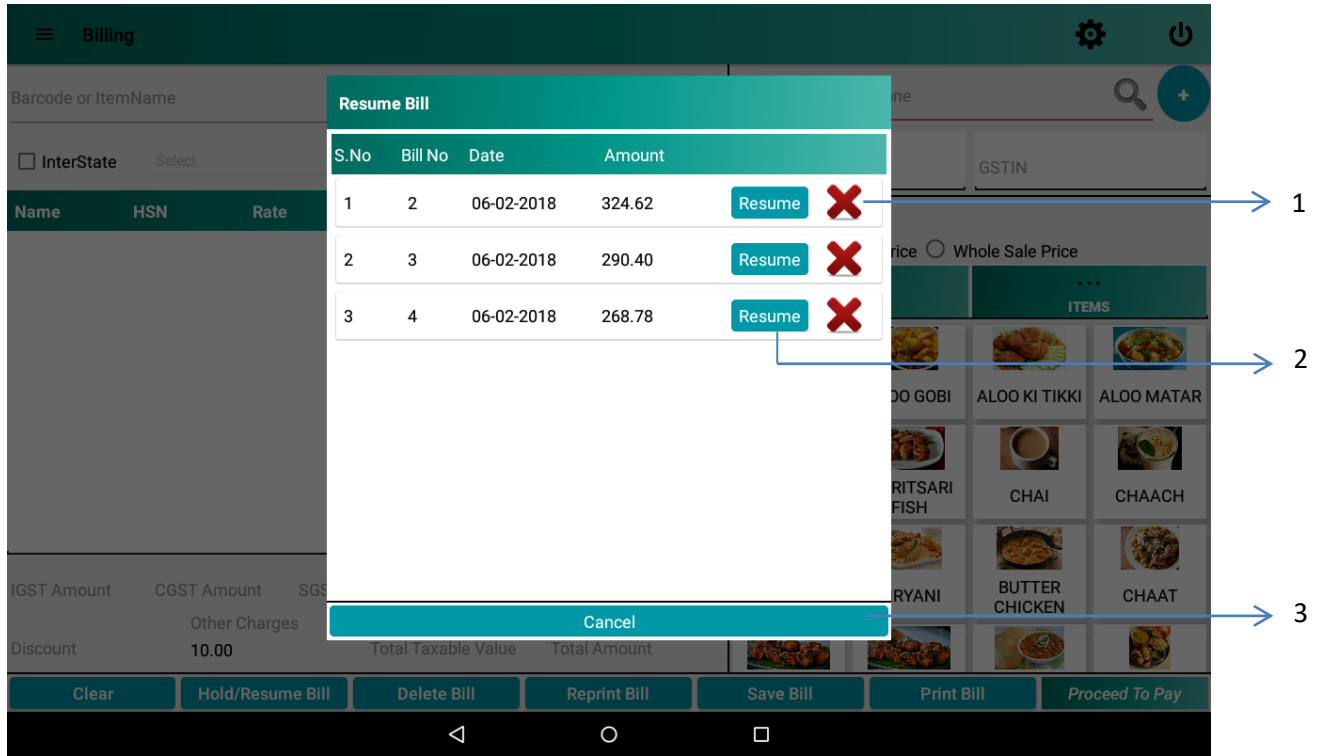


Figure 10: Orders to resume

Label	Field	Description
1	Delete	Deletes the order on hold.
2	Resume	Resumes the order on hold. User can further modify the order.
3	Cancel	Closes the screen.



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### 1.3 Delete Bill

To delete a bill, user has to put the bill number and the date on which the bill was made. For deleting bill user requires manager's credentials.

**Delete Bill**

Enter Bill Number Bill Number

Enter Bill Date 06-02-2018

CANCEL DELETE

Figure 11: Delete Bill

### 1.4 RePrint Bill

To re-print a bill user has to put bill number and the date on which the bill was made.

**RePrint Bill**

Enter Bill Number Bill Number

Enter Bill Date 06-02-2018

CANCEL REPRINT

Figure 12: Reprint Bill



## 2. Making Payment

Payment screen allows user to receive payment by customer through various modes. e.g.: credit card, e-Wallet.

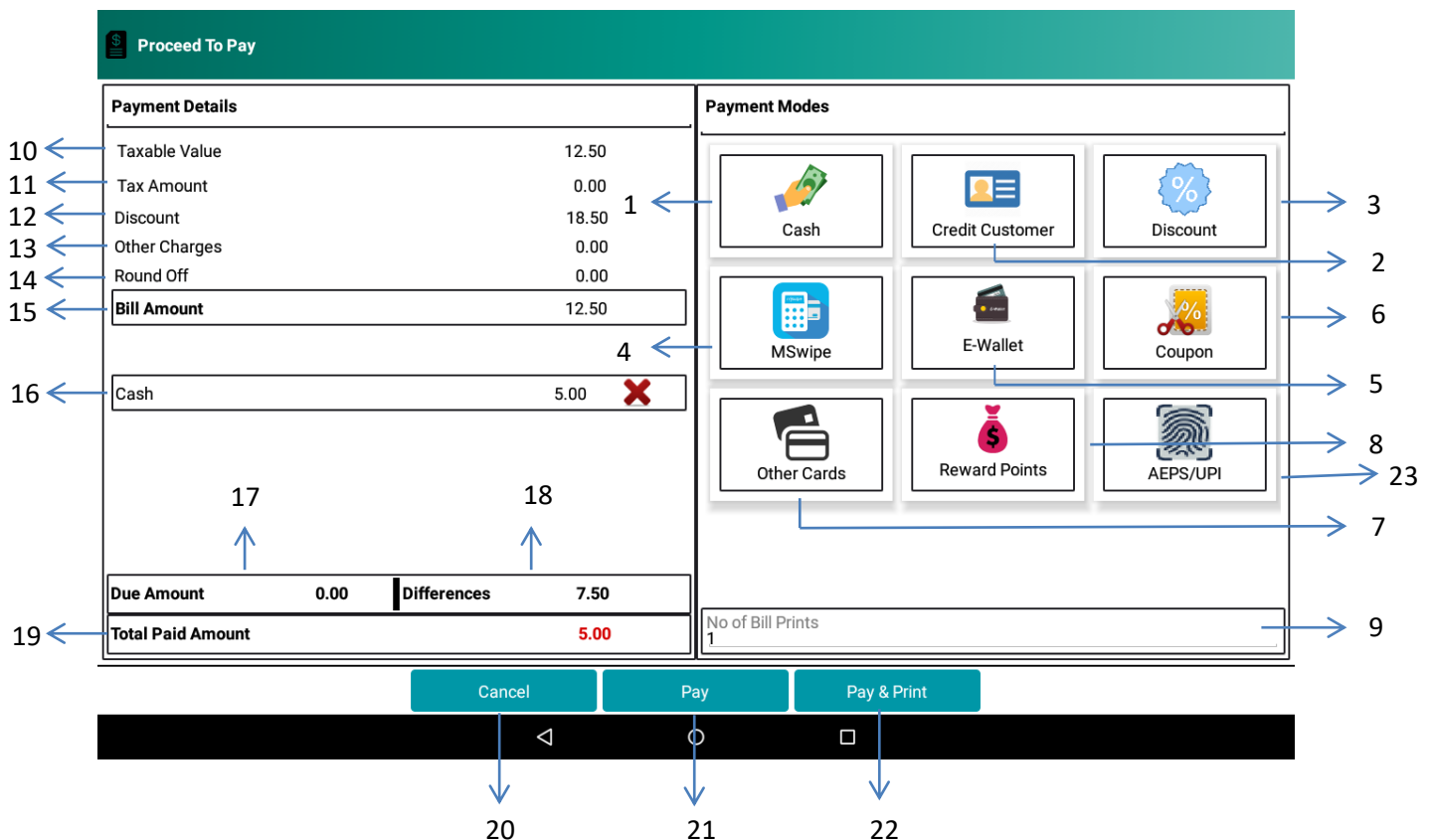


Figure 13: Payment Screen

Label	Field	Description
1	Cash	If the amount is to be paid by cash then user can enter the cash value received by customer.
2	Credit Customer	To make payment through credit amount of that customer.
3	Discount	To apply discount that is configured in configuration. <a href="#">See Details</a> in Section 9.5.
4	MSwipe Payment	Payments through cards via MSwipe machine. To avail this, user should be enrolled on mSwipe



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		website for credentials. ( <a href="#">See Details</a> in Section 3.3)
5	Wallet Payment	Payments through e-wallets. To avail this mode, user is required to register with Razor pay on their website to get Key Id & Secret Key. These credentials can be configured in Payment mode configuration module. ( <a href="#">See Details</a> in Section 3.4).
6	Coupon	To apply coupons which are configured in configuration. <a href="#">See Details</a> in Section 9.6.
7	Other cards	Amount paid by card other than MSwipe machine.
8	Reward Points	To make payments through the reward points that customer has earned.
9	Number of bill prints	Number of copies of bill to print.
10	Taxable Value	Value exclusive of all the taxes and other charges.
11	Tax Amount	Tax Amount.
12	Discount	Discount amount. If user chooses to apply billwise discount then the discount amount (MRP-retail price) will be overwritten by discount amount (Bill wise).
13	Other charges	Other charges Amount (only chargeable ones). <a href="#">See Details</a> in Section 9.7.
14	Round off	Value that is rounded off. (Only applicable if enabled from settings).
15	Bill Amount	Value inclusive of all the taxes and other charges.
16	Amount Paid	It shows that the amount (5.00) is paid by this payment method (Cash).
17	Due Amount	Amount to return to the customer.
18	Difference	Amount left to receive from the customer.
19	Total Paid Amount	Total amount paid by the customer.



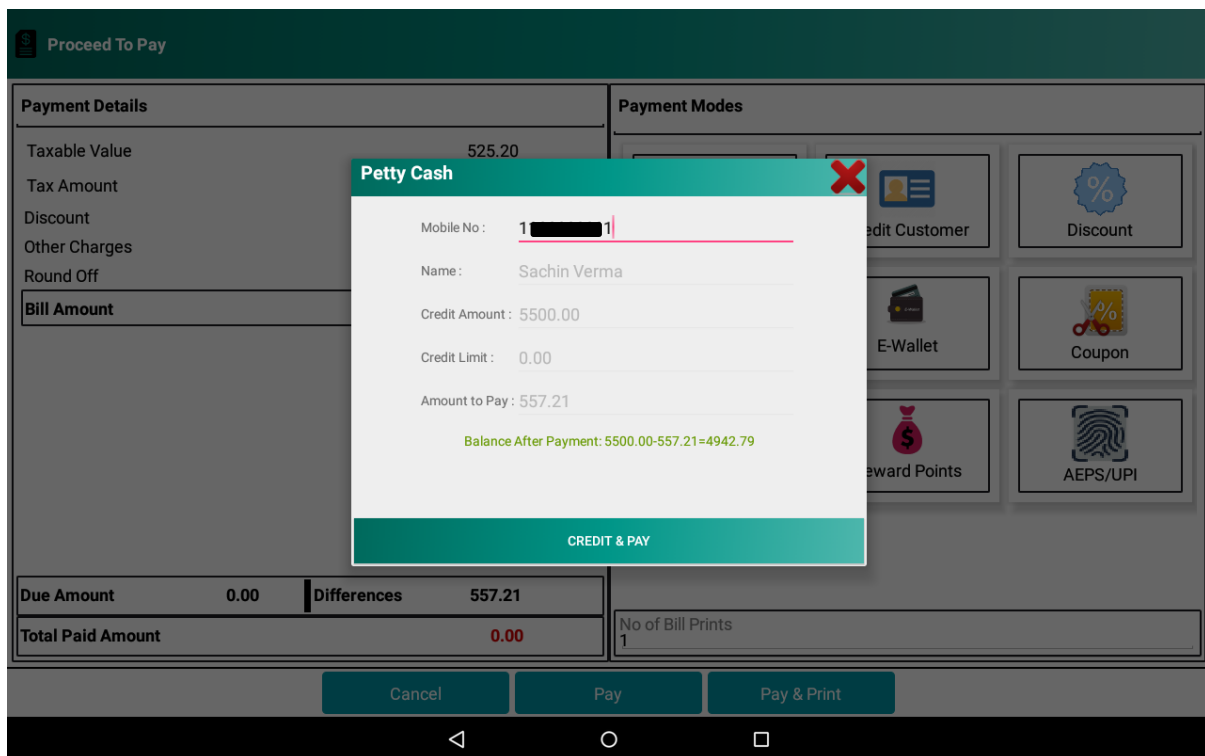
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20	Cancel	Closes the payment screen.
21	Pay	Save the bill without print.
22	Pay & Print	To save and print the bill.
23	AEPS	Option to make payment via Aadhar or UPI mode

### 2.1 Credit Customer

For using credit customer payment, user has to add customer with credit limit and opening balance (opening balance will be added into credit amount) ([See Details](#) in Section 5.1).

Now follow the following steps to make payment by credit customer:-



**Figure 14: Enter customer's mobile number and click on credit and pay**

The amount will automatically be deducted from customer's credit amount.



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**Proceed To Pay**

Payment Details		Payment Modes	
Taxable Value	525.20	Cash	Credit Customer
Tax Amount	32.03	Discount	
Discount	14.90	MSwipe	E-Wallet
Other Charges	0.00	Coupon	
Round Off	0.00	Other Cards	Reward Points
<b>Bill Amount</b>	<b>557.21</b>	AEPS/UPI	
Credit Customer	557.21	No of Bill Prints 1	
<b>Due Amount</b>	<b>0.00</b>	<b>Differences</b> 0.00	
<b>Total Paid Amount</b>	<b>557.21</b>		

Buttons: Cancel, Pay, Pay & Print

Figure 15: After payment is made, the paid amount will be shown on the screen

### 2.1.1 If credit amount is less than the amount to pay

In case the amount to be pay by customer is more than the customer's credit amount than customer can make partial payment as well. For example:-

Amount to pay = ₹ 800

Customer's Credit Amount = ₹200

Customer's Credit Limit = ₹300

Then Amount to pay – (Credit's Customer Amount + Credit's Credit Limit) = ₹ 300, now due amount of ₹ 300 can be paid by any other mode of payment.



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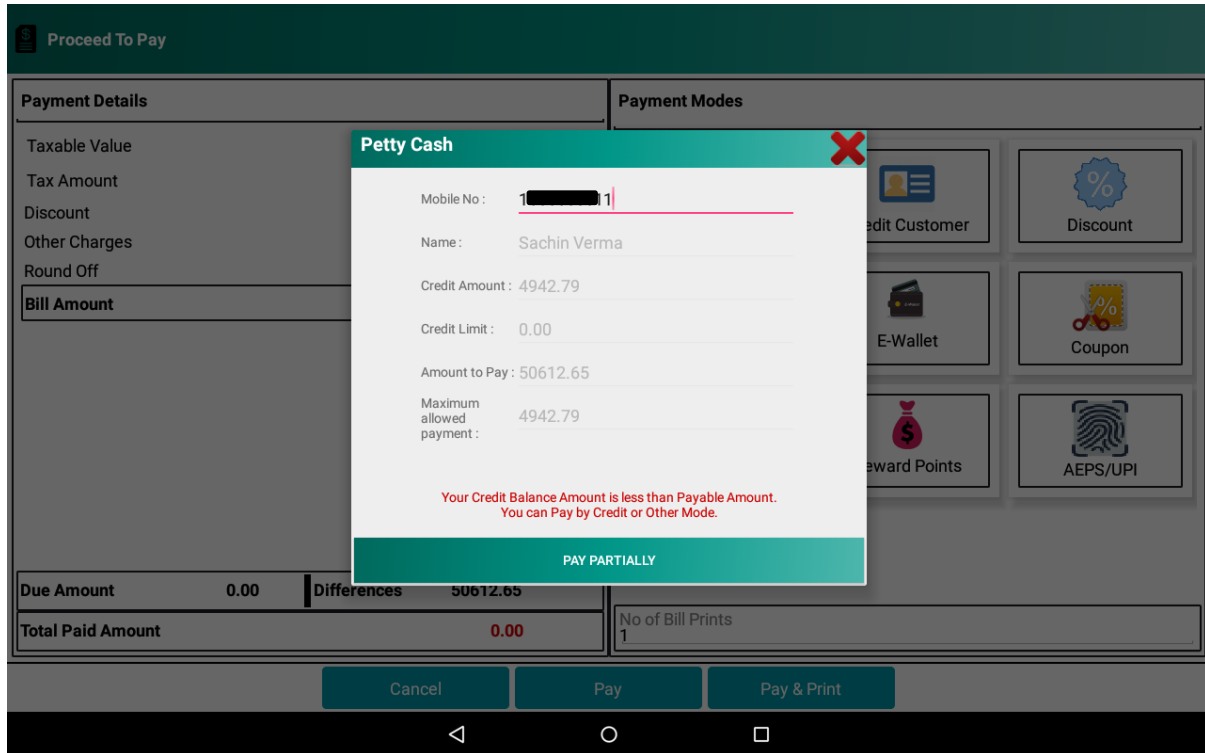


Figure 16: Enter customer's mobile number and click on pay partially

## 2.2 Discount

User can apply discount on bill amount generated and these discounts can be configured in configuration. [See Details](#) in Section 9.5.

**Note:** Please note discount is calculated on subtotal.



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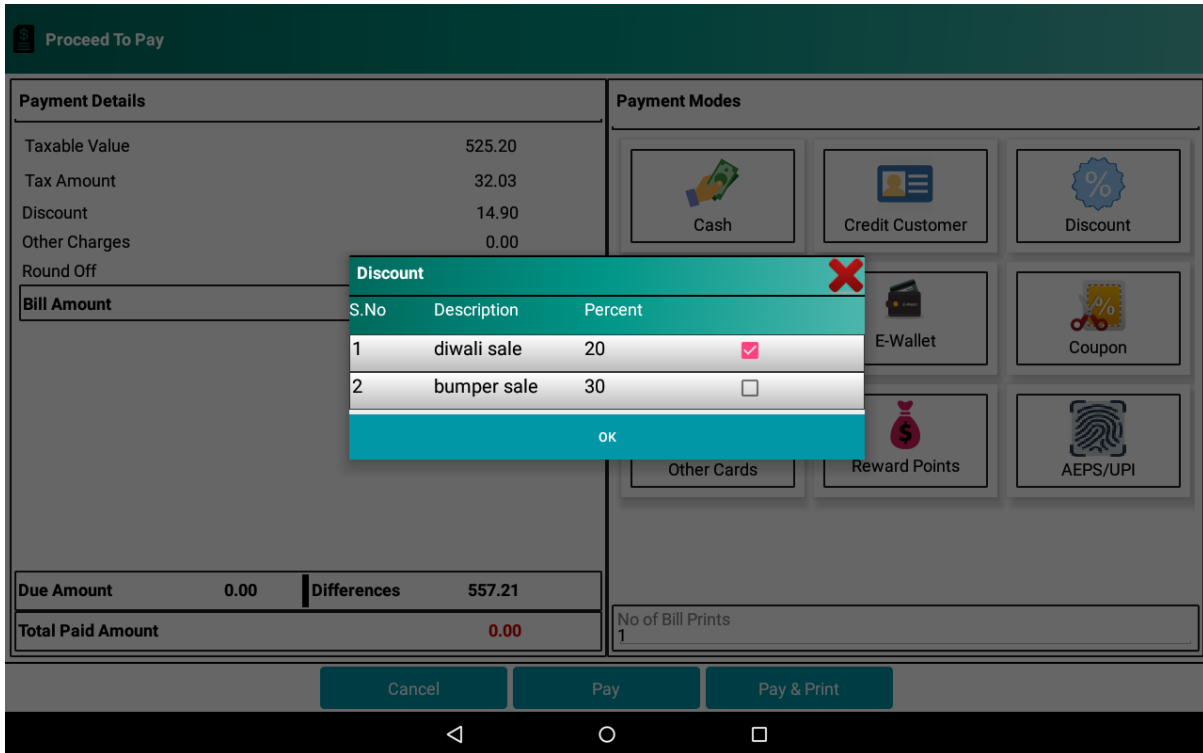


Figure 17: Click on Discount you want to apply

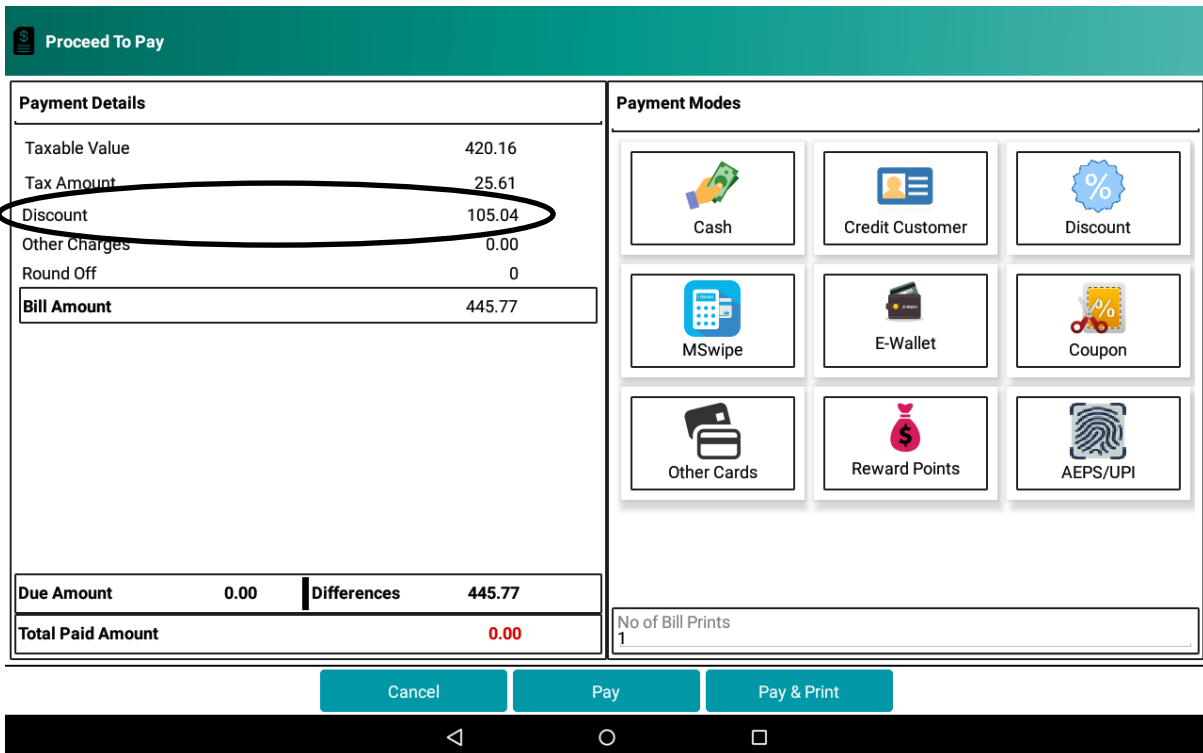


Figure 18: After applying discount the discounted amount will be displayed.



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## 2.3 MSwipe Payments

MSwipe payment is one of the upcoming features of GST Genie R. This will allow user to make payment through cards using MSwipe Machine. Support contact for mswipe can be found on below mention site. User need to register with MSwipe to start using the mswipe machine. To register [Click Here](#) or visit <http://www.mswipe.com/>

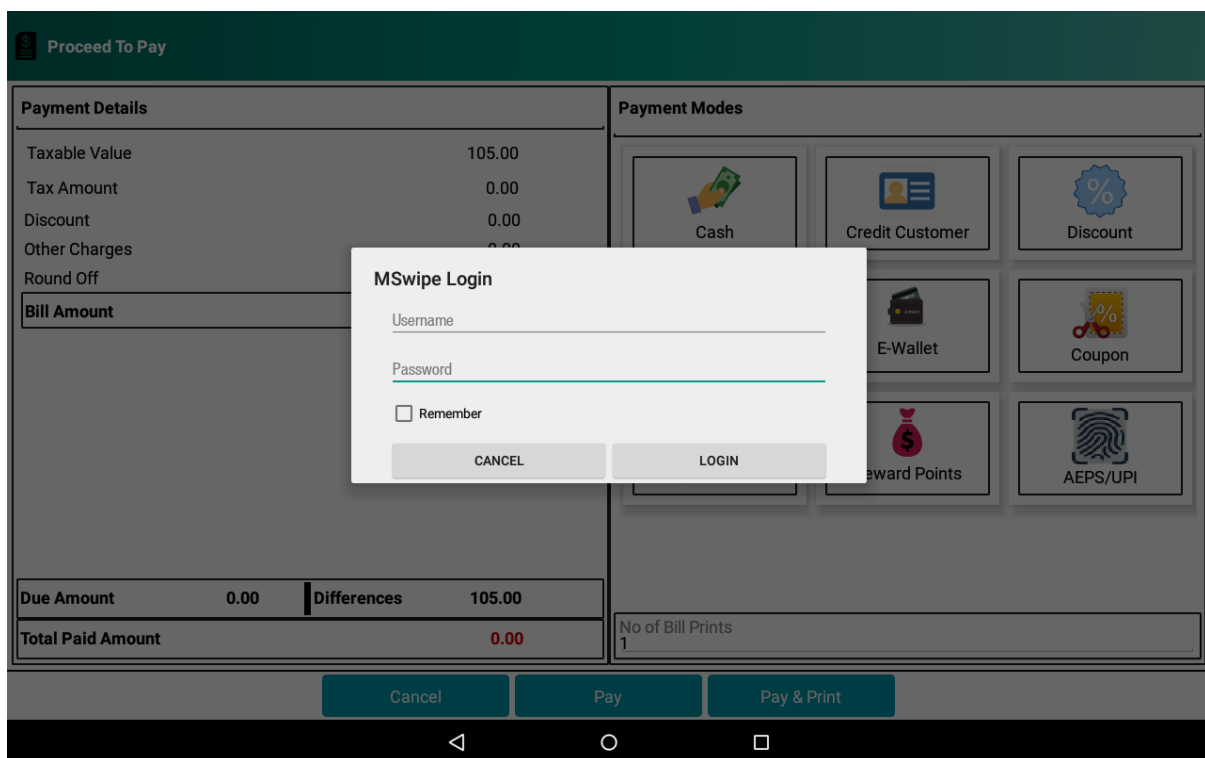


Figure 19 : Enter valid mswipe credentials to make card transaction



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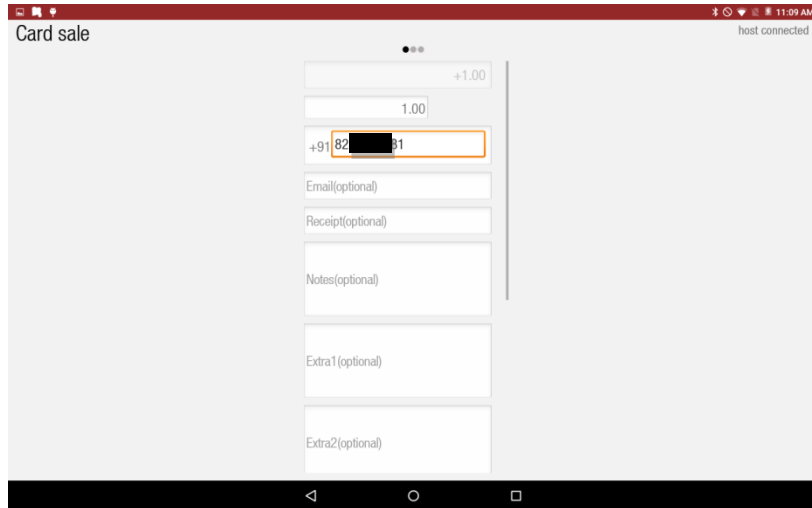


Figure 20 Enter customer's mobile no. as it is mandatory, then scroll down and click on next

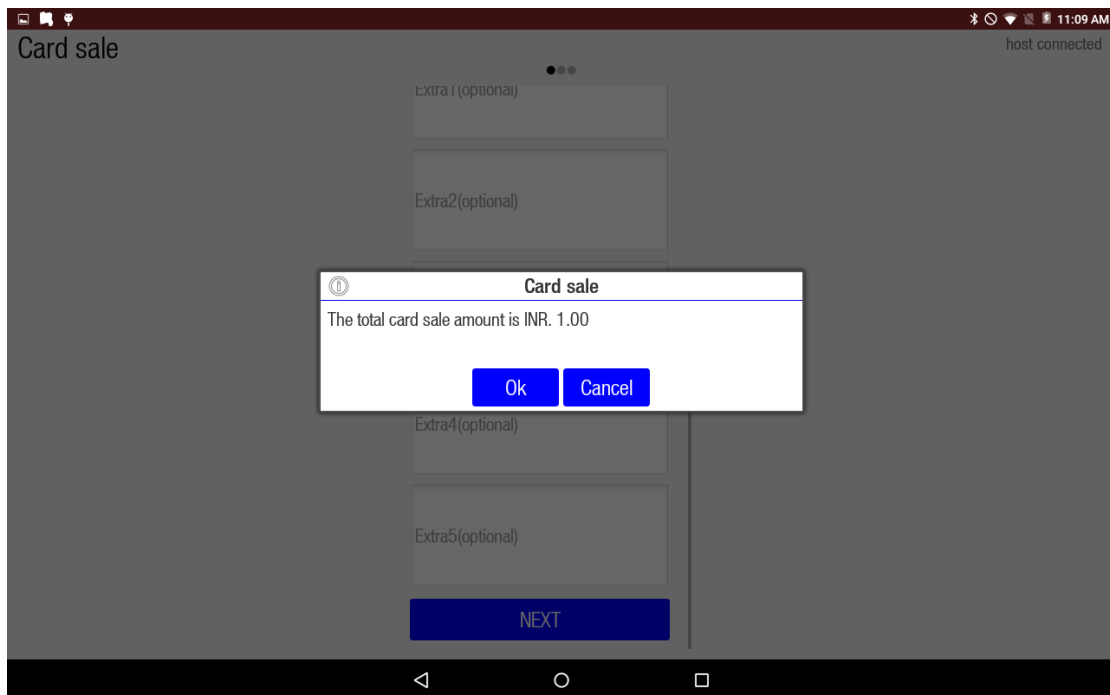


Figure 21 Confirm the amount and then click on OK





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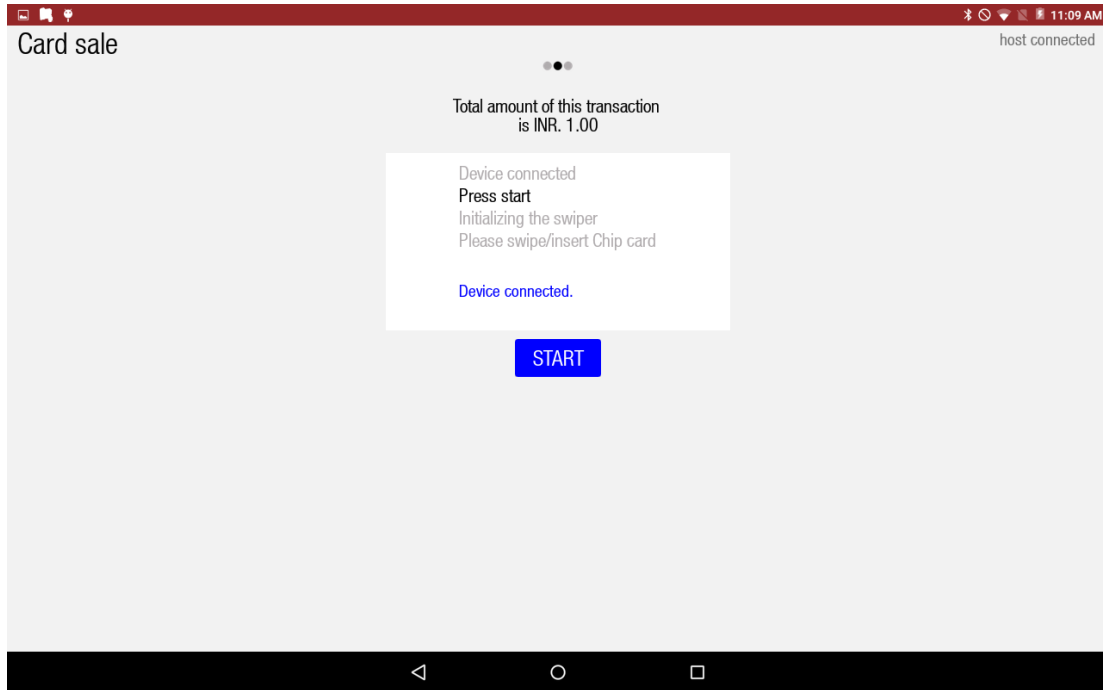


Figure 22 Connect MSwipe Machine via Bluetooth (if not already) and click on start to initiate the transaction

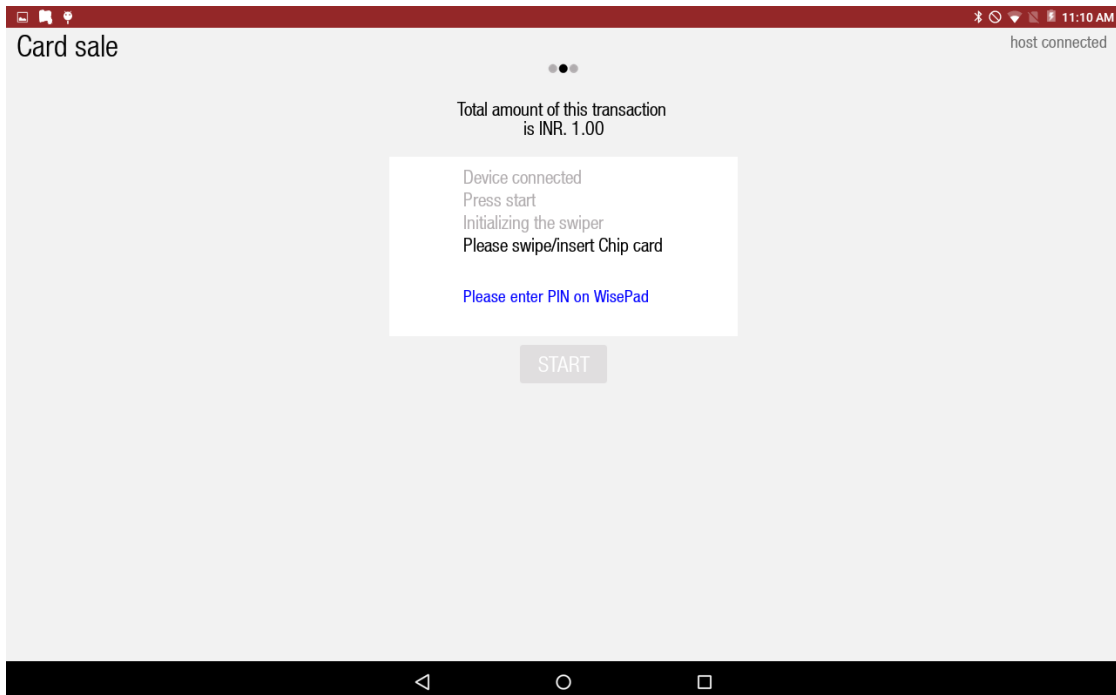


Figure23: Once the application detects the machine it will ask user to insert or swipe the card



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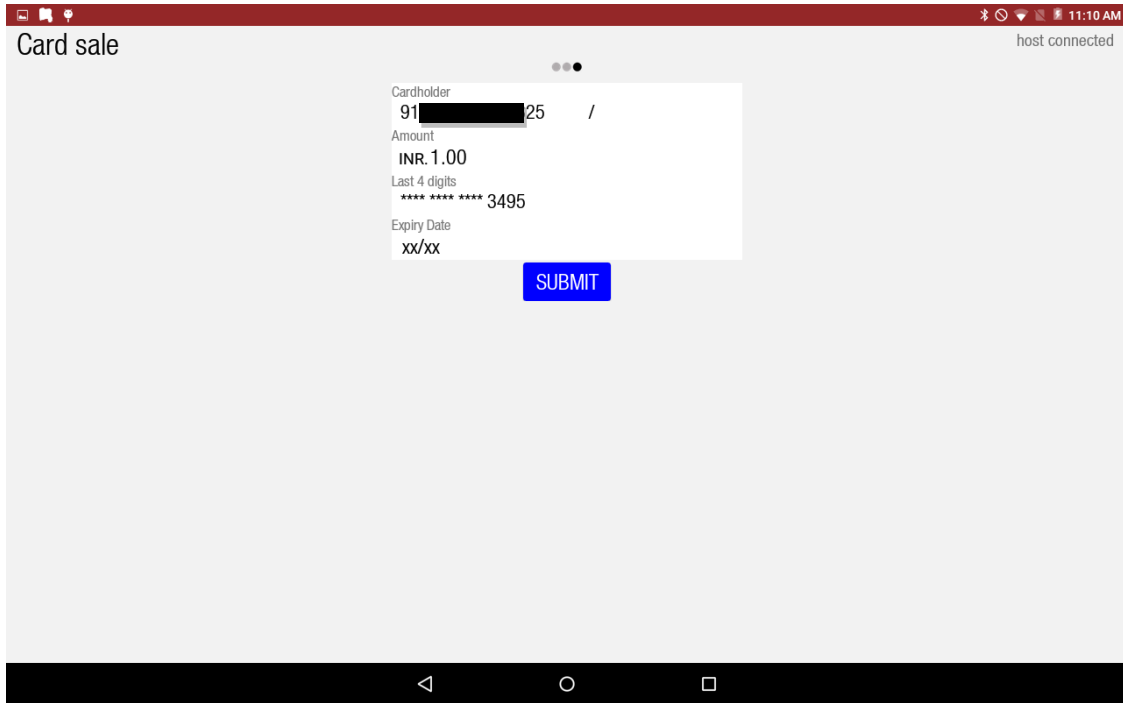


Figure 23 After swiping and entering the PIN click on Submit

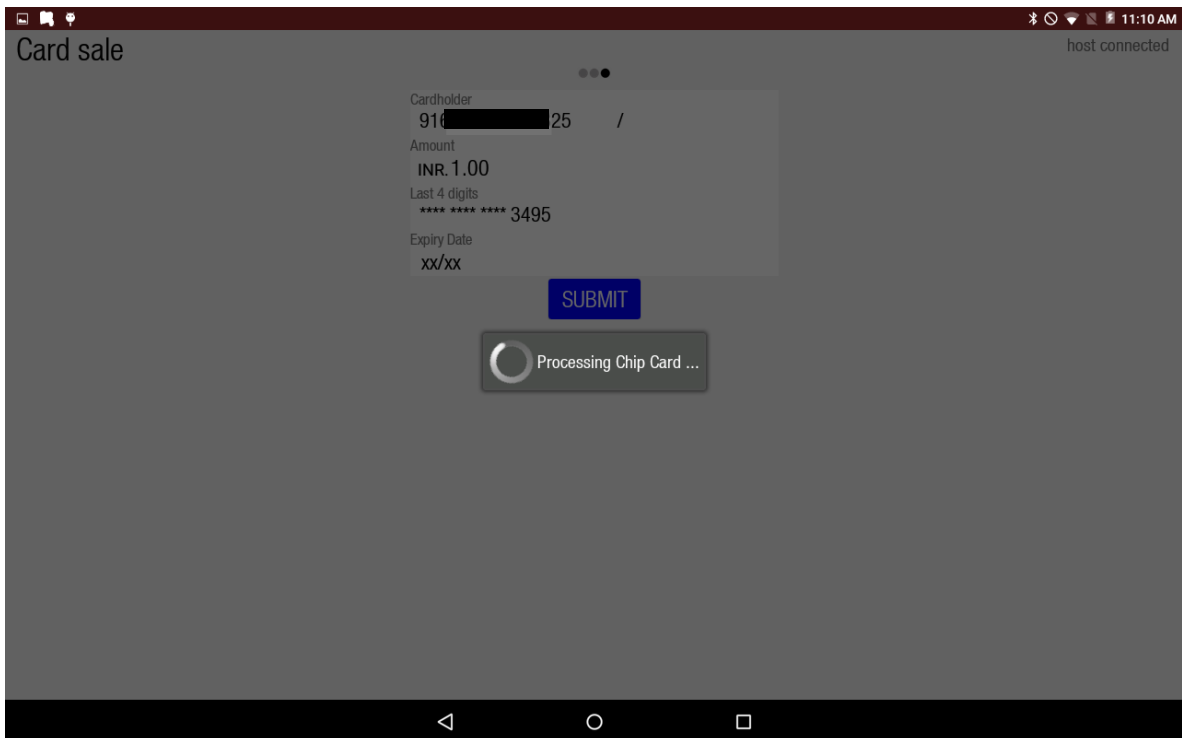


Figure 24 Verification of credentials will happen



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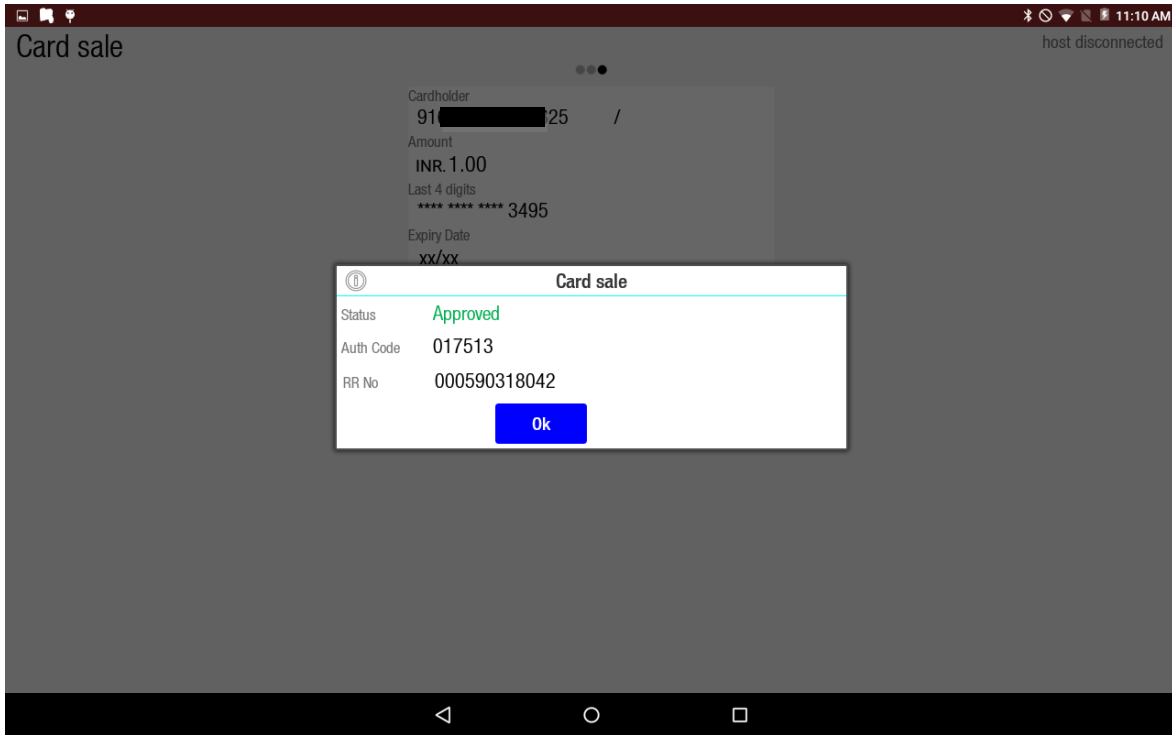


Figure 25 : A message will pop up for transaction status as success or failed

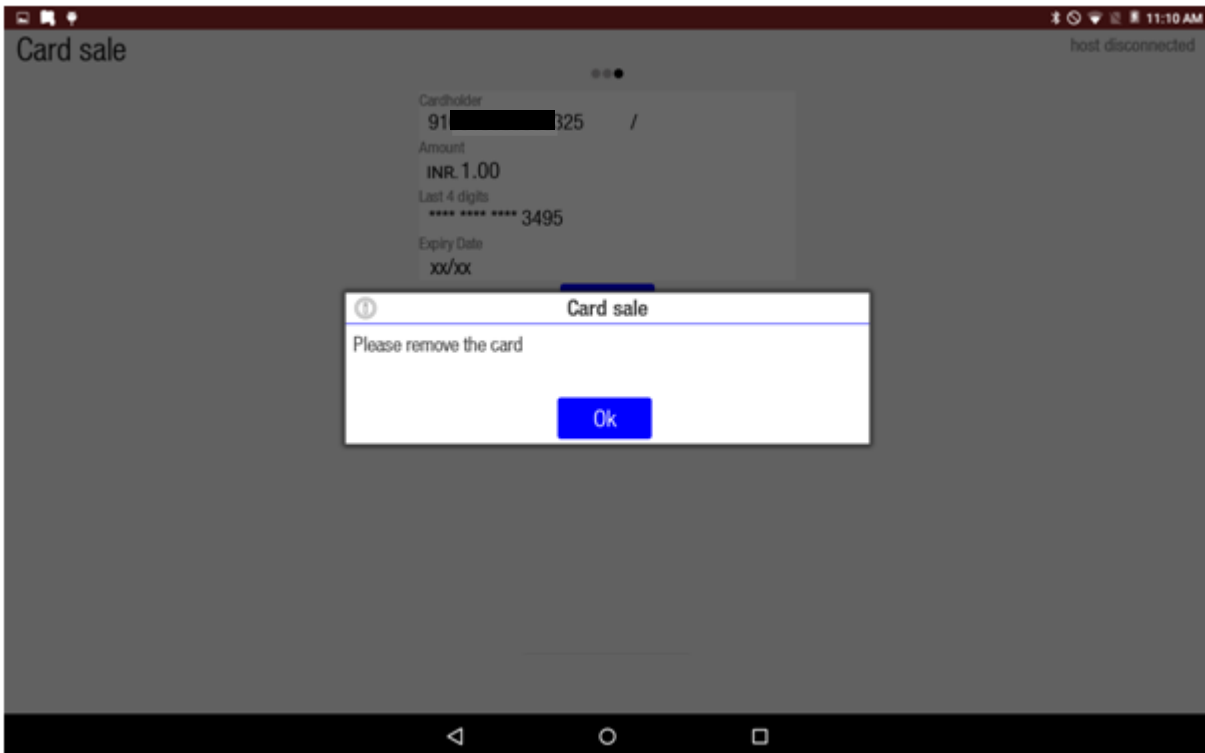


Figure 26 Enter customer's mobile no. as it is mandatory, then scroll down and click on next



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## 2.4 e-Wallet Payments

For making e-wallet payments user needs to configure Razor Pay Key id ([See details in Section 12.5](#)).To get Key id user needs to register on Razor Pay website, to register [Click Here](#) or visit <https://razorpay.com/>. After on boarding with razorpay, user can log in on razorpay site with valid razorpay credentials and in settings can find the keys.

*Kindly note that valid key id is compulsory to configure, secret key is optional. Once user has configured a valid key id provided by Razozr Pay, then connect the device to Wi-Fi and follow the following steps:-*

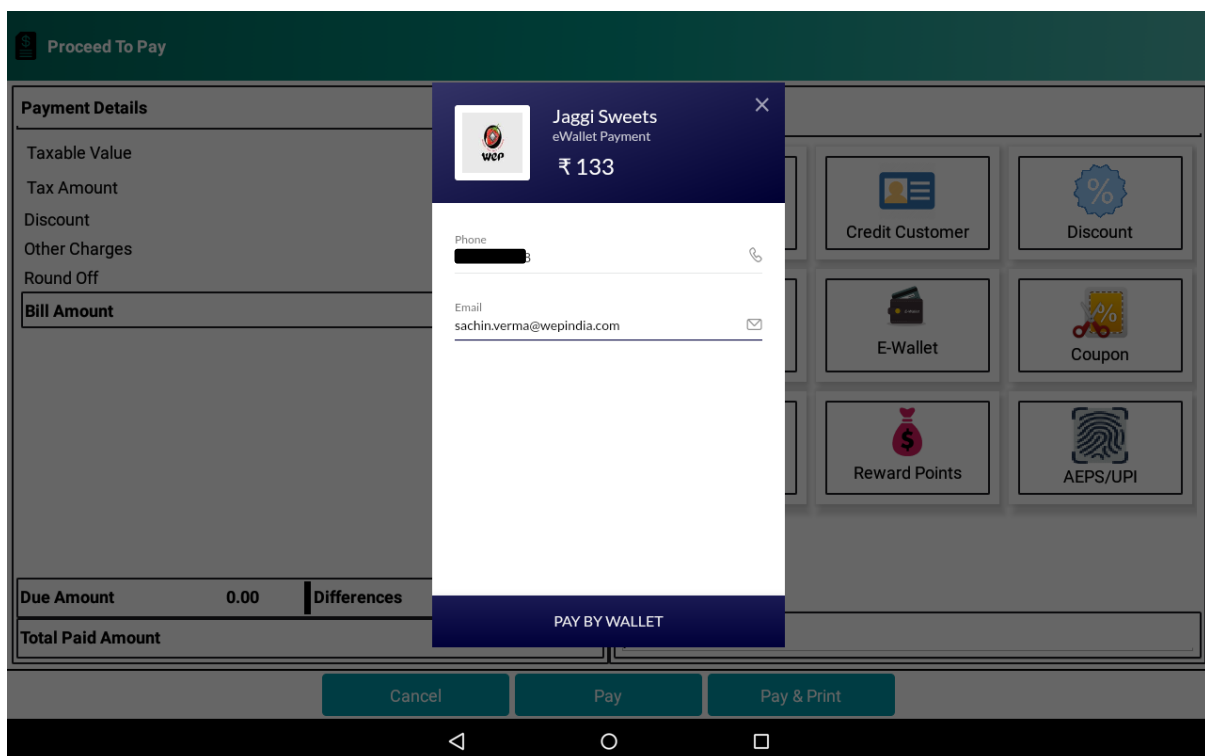


Figure 27: Click on e-wallet and enter customer's mobile number and email



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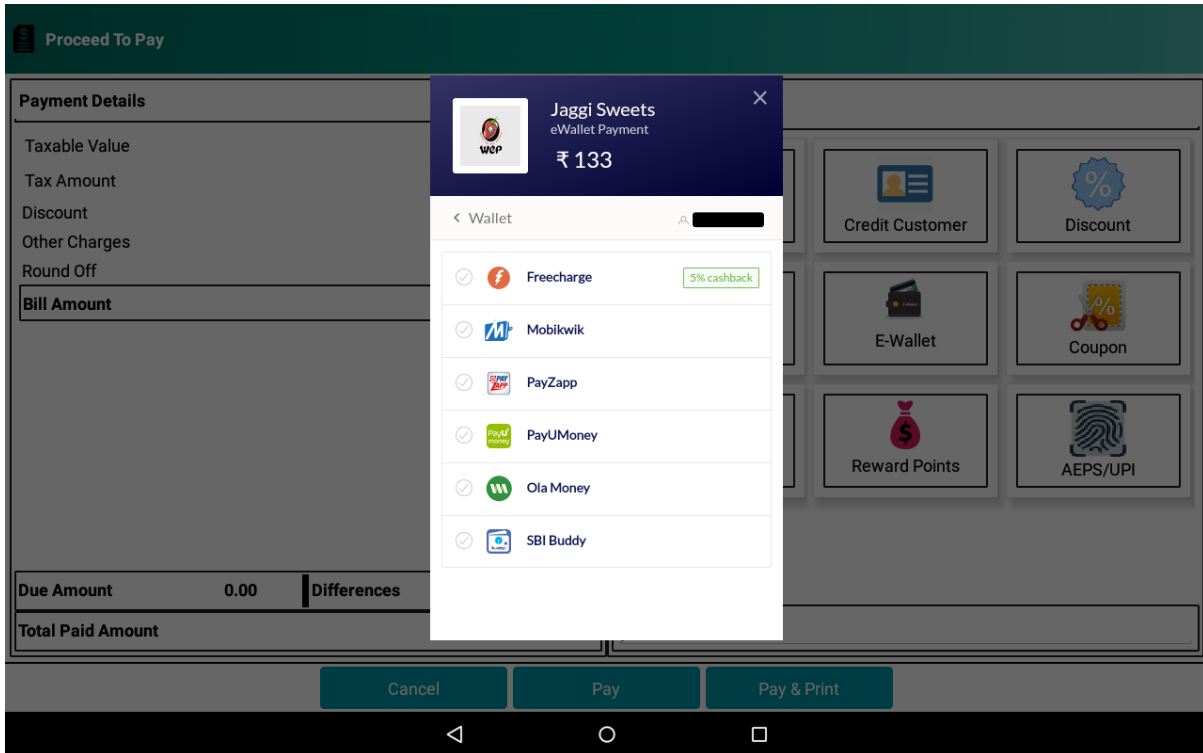


Figure 28: Select a wallet through which customer wants to make payment

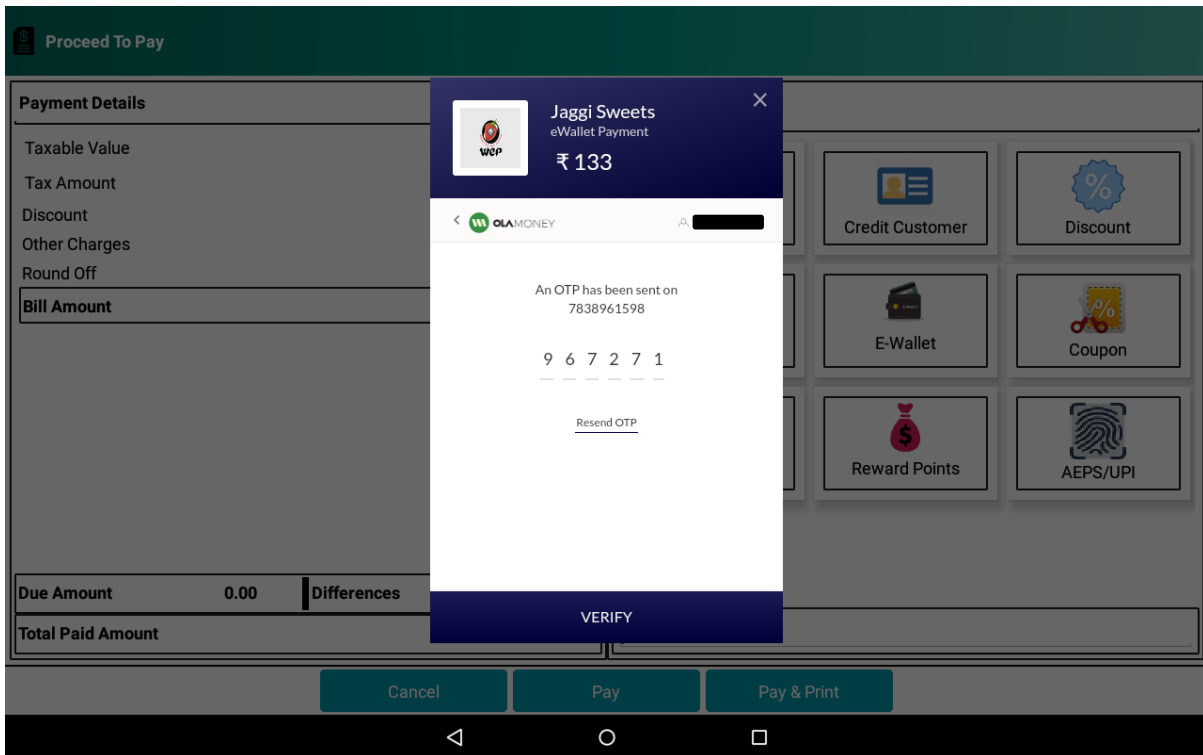


Figure 29: An OTP will be sent on customer's mobile number. Then enter the received OTP



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**Proceed To Pay**

Payment Details		Payment Modes		
Taxable Value	133.00	Cash	Credit Customer	Discount
Tax Amount	0.00	MSwipe	E-Wallet	Coupon
Discount	0.00	Other Cards	Reward Points	AEPS/UPI
Other Charges	0.00			
Round Off	0.00			
<b>Bill Amount</b>	<b>133.00</b>			
E-Wallet	133.00			
<b>Due Amount</b>	<b>0.00</b>	<b>Differences</b>	<b>0.00</b>	No of Bill Prints
<b>Total Paid Amount</b>	<b>133.00</b>	1		

Buttons: Cancel, Pay, Pay & Print

Figure 30: After OTP verification, amount will be deducted from customer's e-wallet

### 2.5 Coupons

User can apply coupons on bill amount. User has to configure coupons in configuration. [See Details](#) in Section 9.6. User can apply more one coupon.



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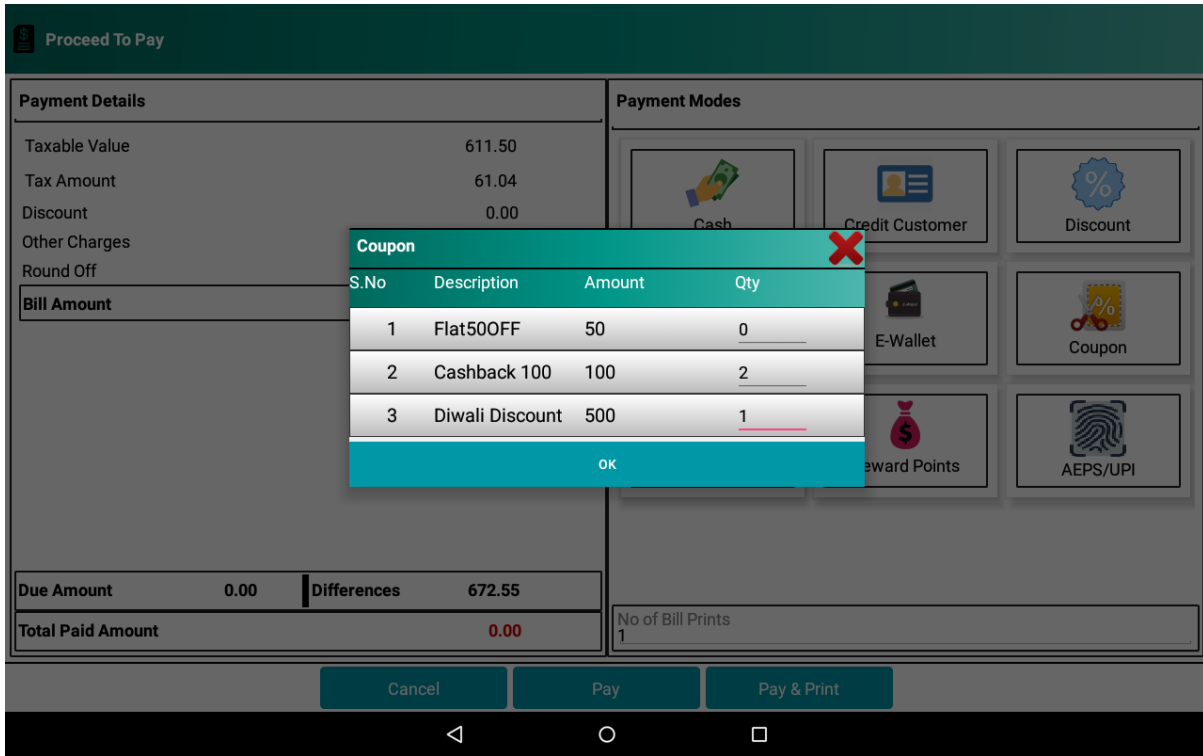


Figure 31: Enter the count and click on ok to apply coupon

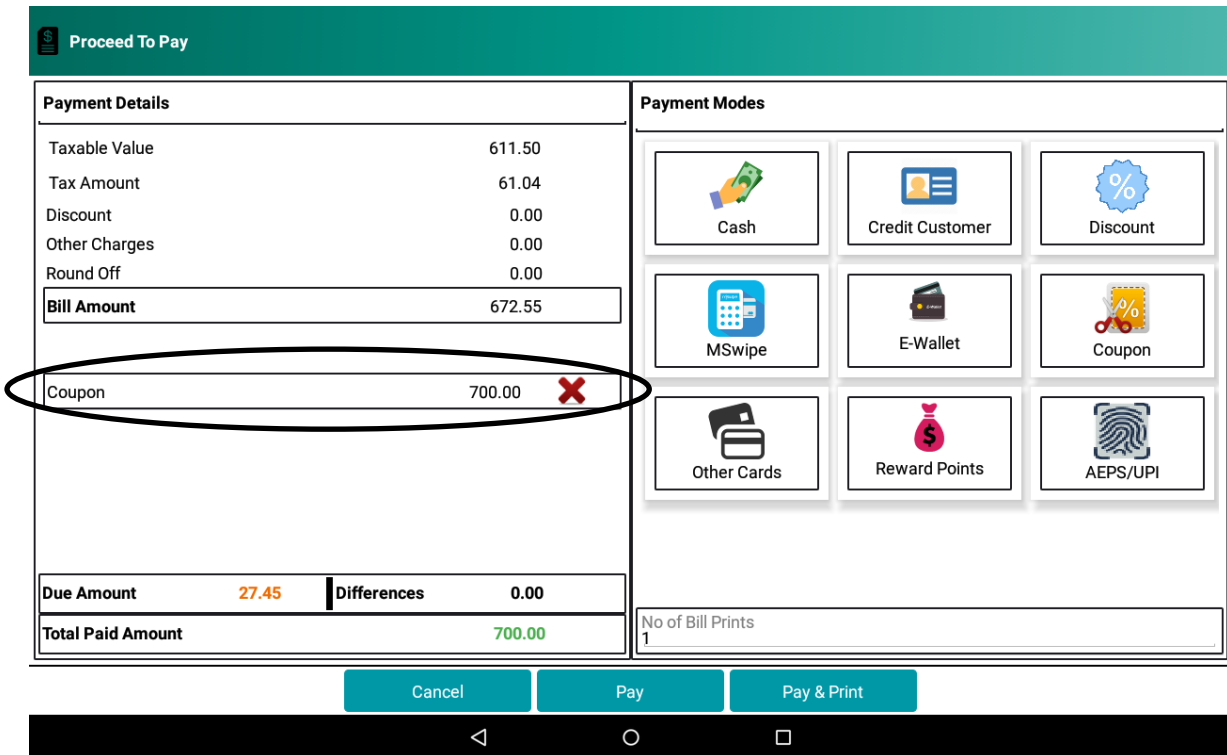


Figure 32: After applying coupon, coupon amount will get displayed



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### 2.6 Other Cards

If payment is made through cards but machine for swiping cards is used other than the MSwipe machine then user can simply enter the amount paid other card by the customer.

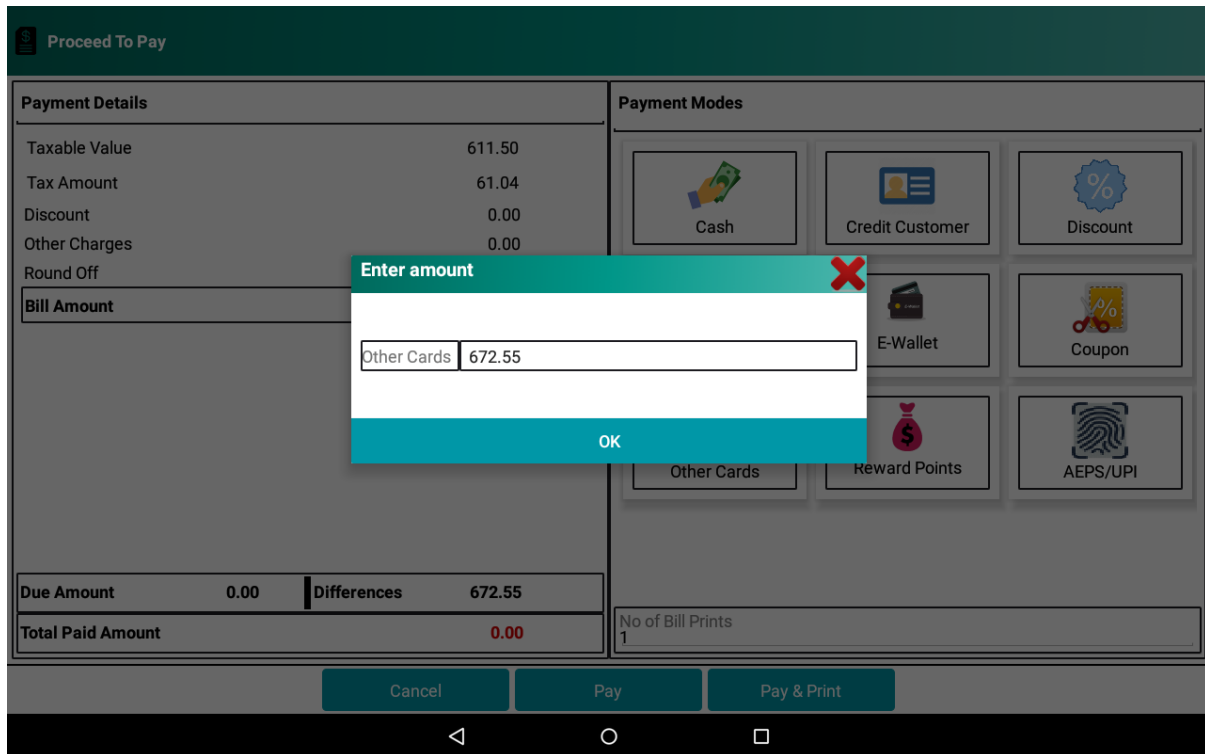


Figure 33 : Enter the amount paid by Other cards





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**Proceed To Pay**

Payment Details		Payment Modes		
Taxable Value	611.50	Cash	Credit Customer	Discount
Tax Amount	61.04	MSwipe	E-Wallet	Coupon
Discount	0.00	Other Cards	Reward Points	AEPS/UPI
Other Charges	0.00			
Round Off	0.00			
<b>Bill Amount</b>	<b>672.55</b>			
<b>Other Cards</b>	<b>672.55</b>			
<b>Due Amount</b>	<b>0.00</b>	<b>Differences</b>	<b>0.00</b>	No of Bill Prints
<b>Total Paid Amount</b>	<b>672.55</b>	1		

Cancel   Pay   Pay & Print

Figure 34: Amount will be displayed paid by other cards

## 2.7 Reward Points

Your customer can pay through the reward points that they earned. To configure reward points [See Details](#) in Section 9.8. This option is available if enabled in settings.



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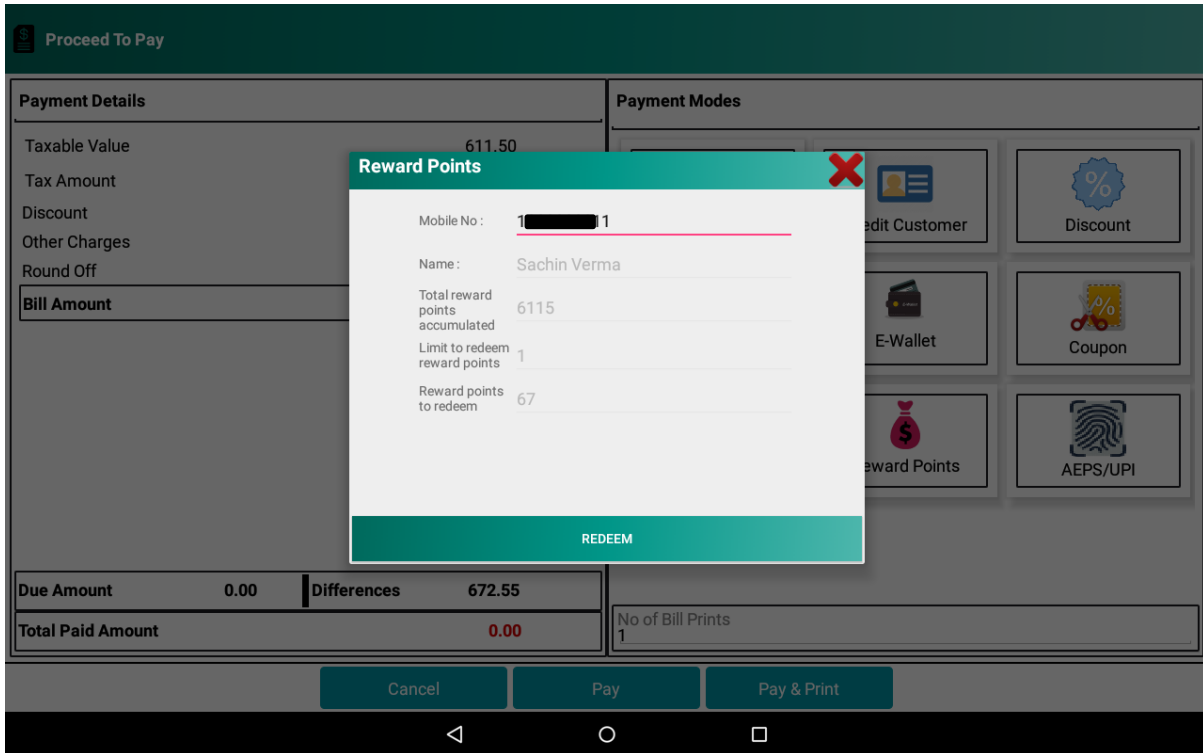


Figure 35: Enter customer's mobile number and click on redeem

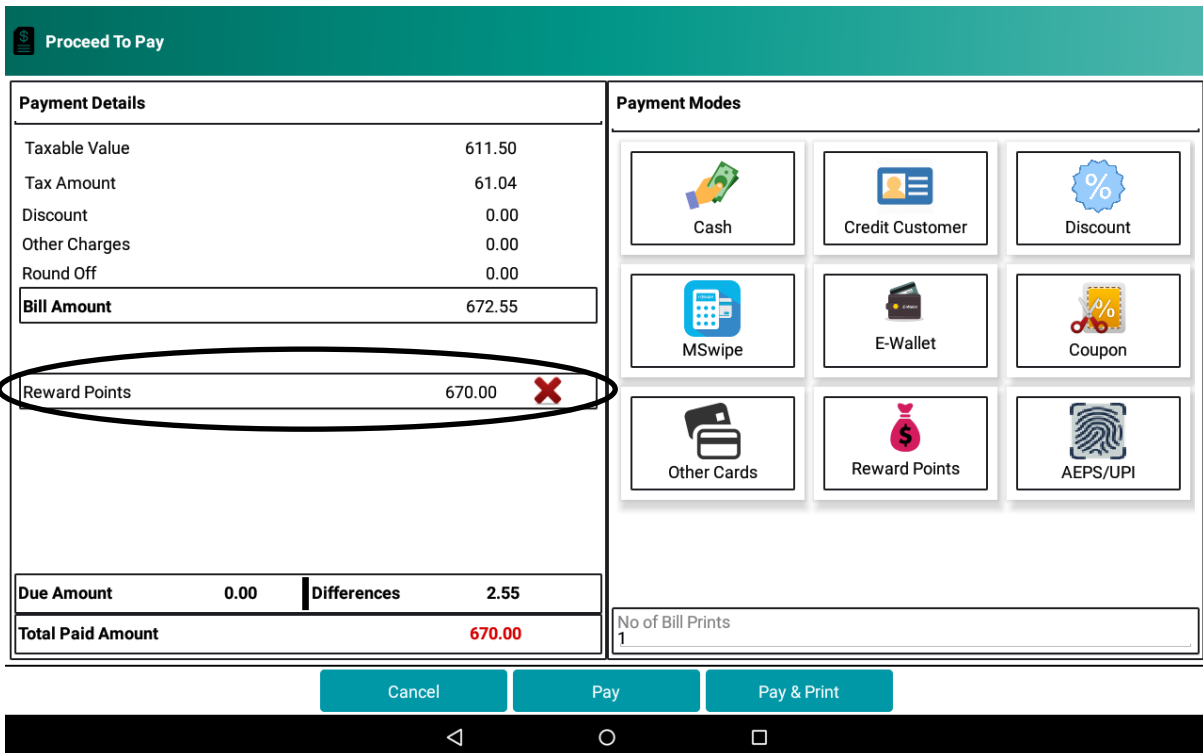


Figure 36: Amount paid by reward points will be displayed



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## 2.8 AEPS Payment

Your customer can pay through AEPS also. User need to enter the merchant Id , app Id and secret key , in Settings-> payment mode configuration -> AEPS , given to him at the time of registration. For valid credentials, user will be able to make AEPS transaction.



Figure 37 : Upon clicking AEPS/UPI , both option comes up on screen

- a) UPI
  1. End customer need to scan the code through the app which supports QR code payment.
  2. Once end customer approves and pay the amount though QR code scanning ,then upon successful transaction, it will be reflected on the screen.



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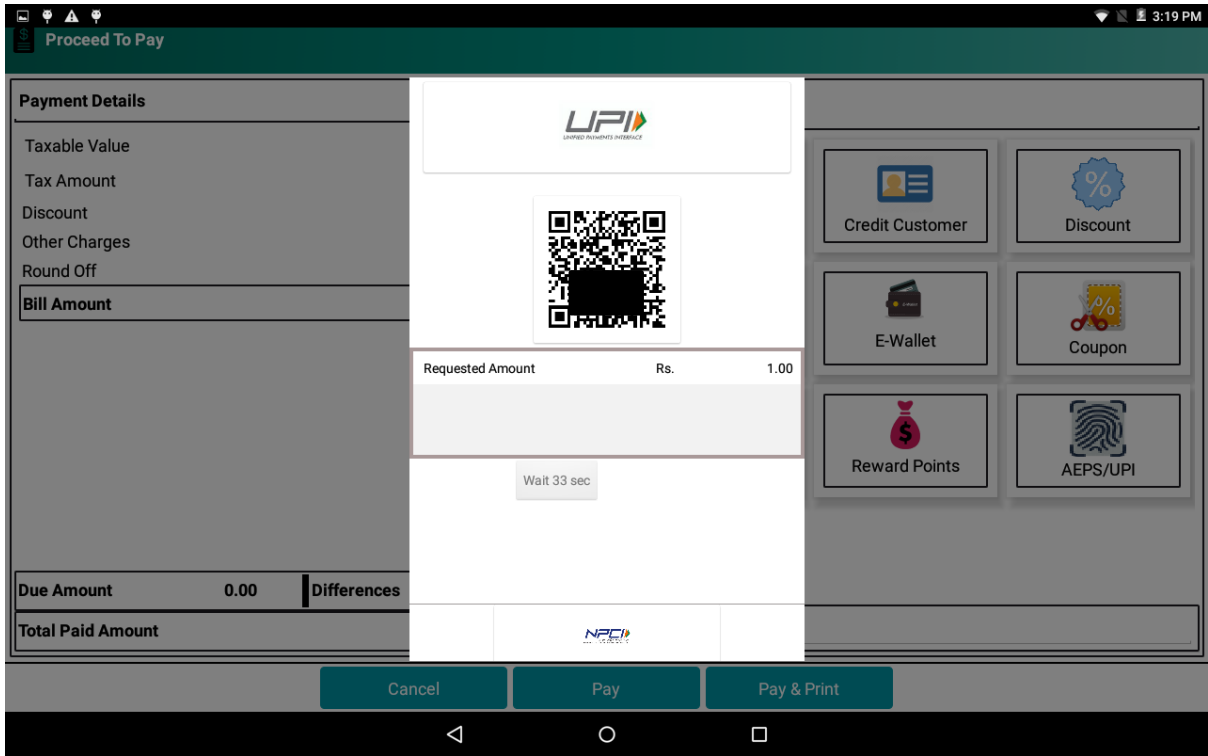


Figure 38 : Upon selecting UPI payment mode, QR code is generated

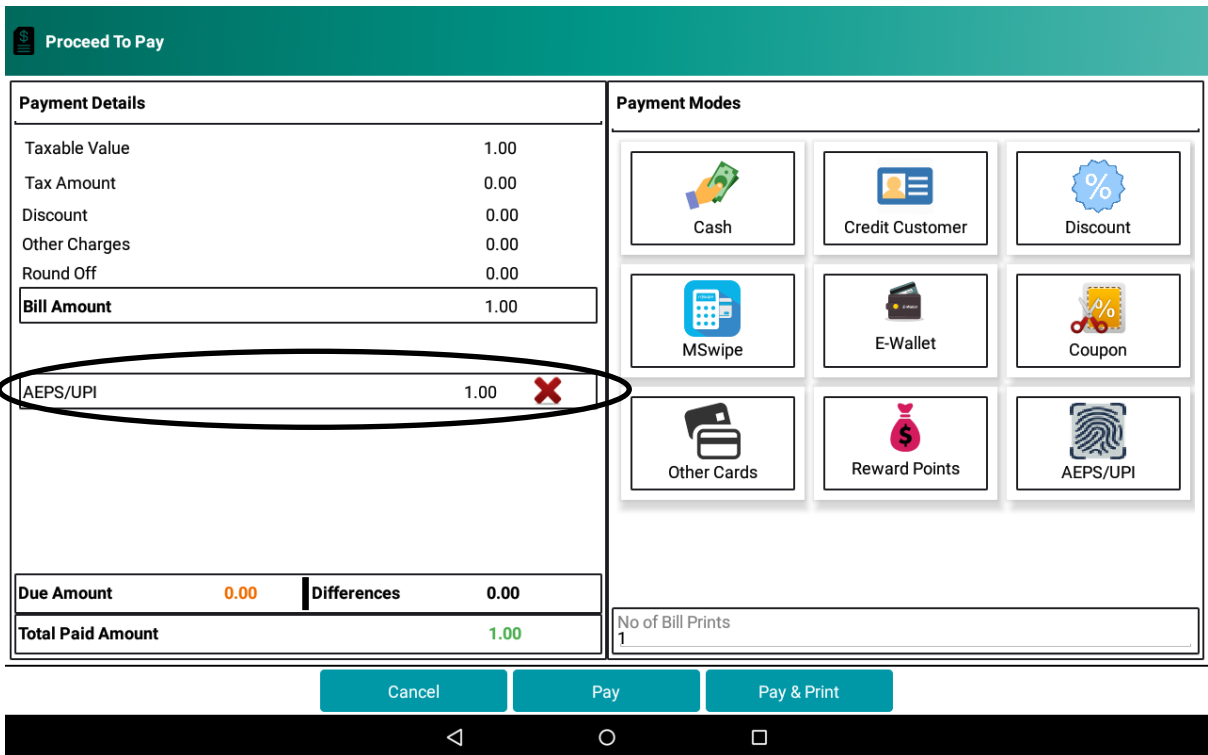


Figure 39 : Upon successful UPI transaction , amount is reflected in screen



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- b) AEPS(Aadhar Enabled Payment System)
  - 1. Enter end customer's aadhar no and bank name, in which his aadhar no is linked.
  - 2. Place finger on scanner and click capture.

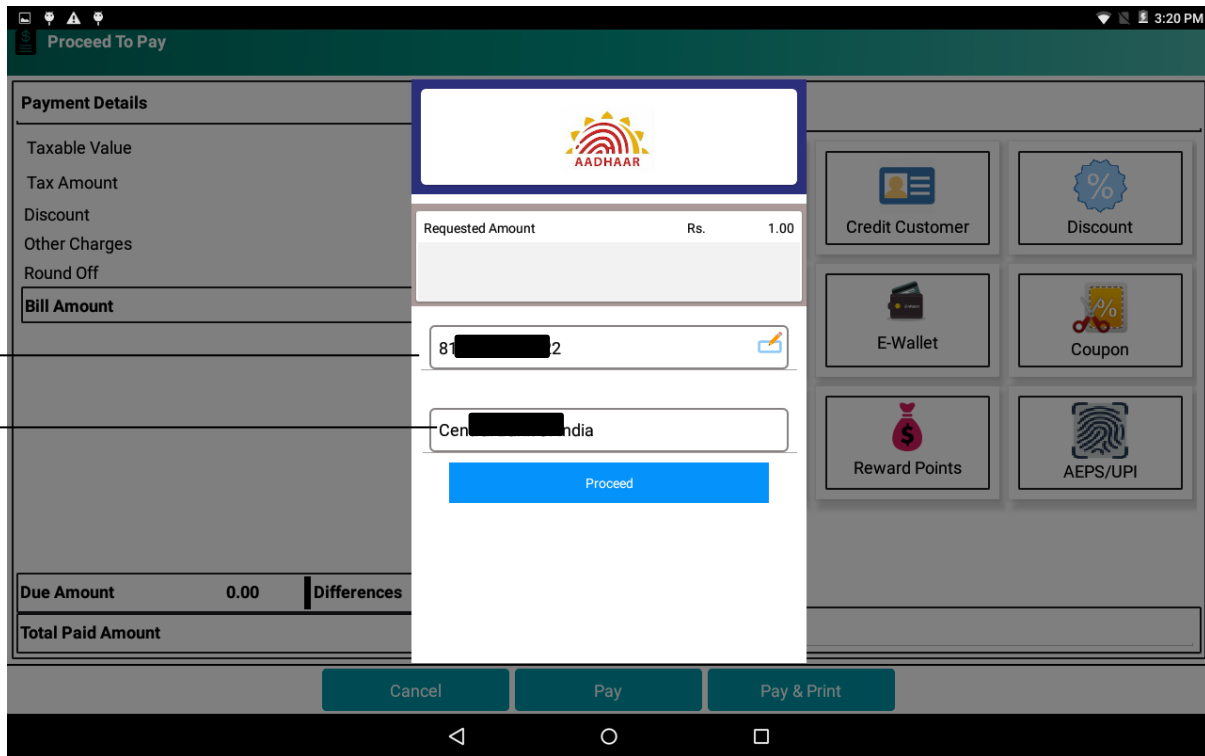


Figure 40 : Upon clicking Aadhar, end customer's aadhar no and bank name is required



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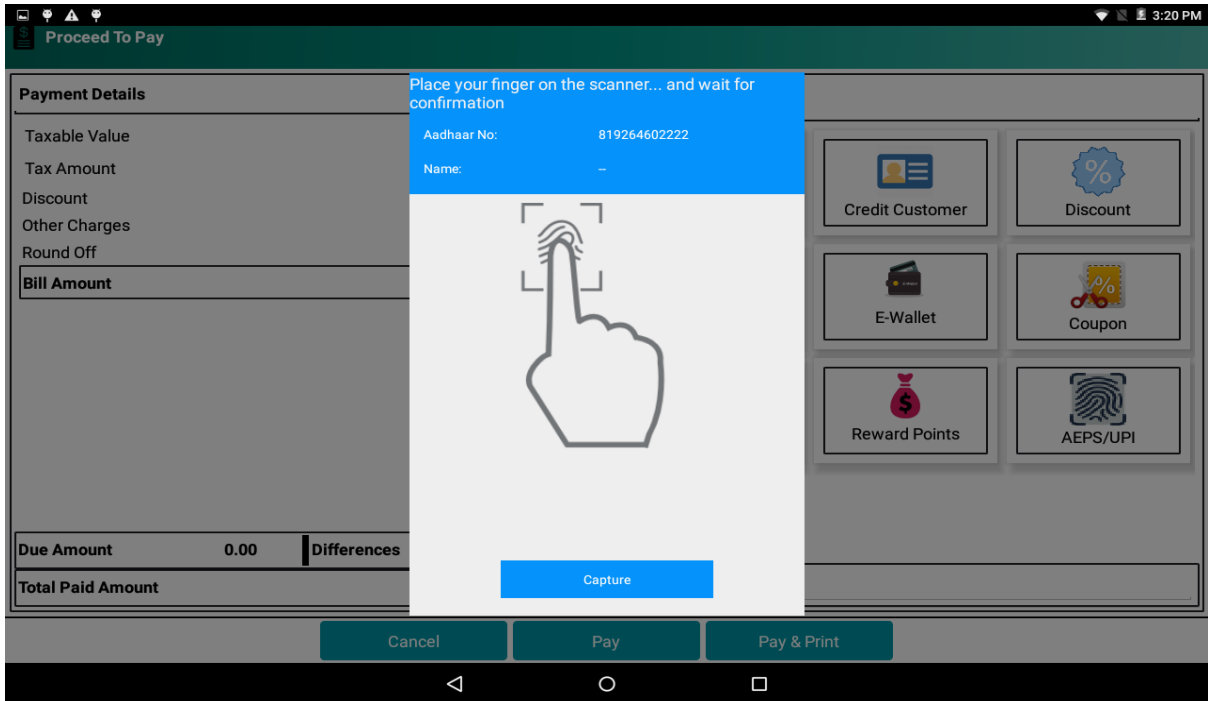


Figure 41 : Place finger on scanner and click capture

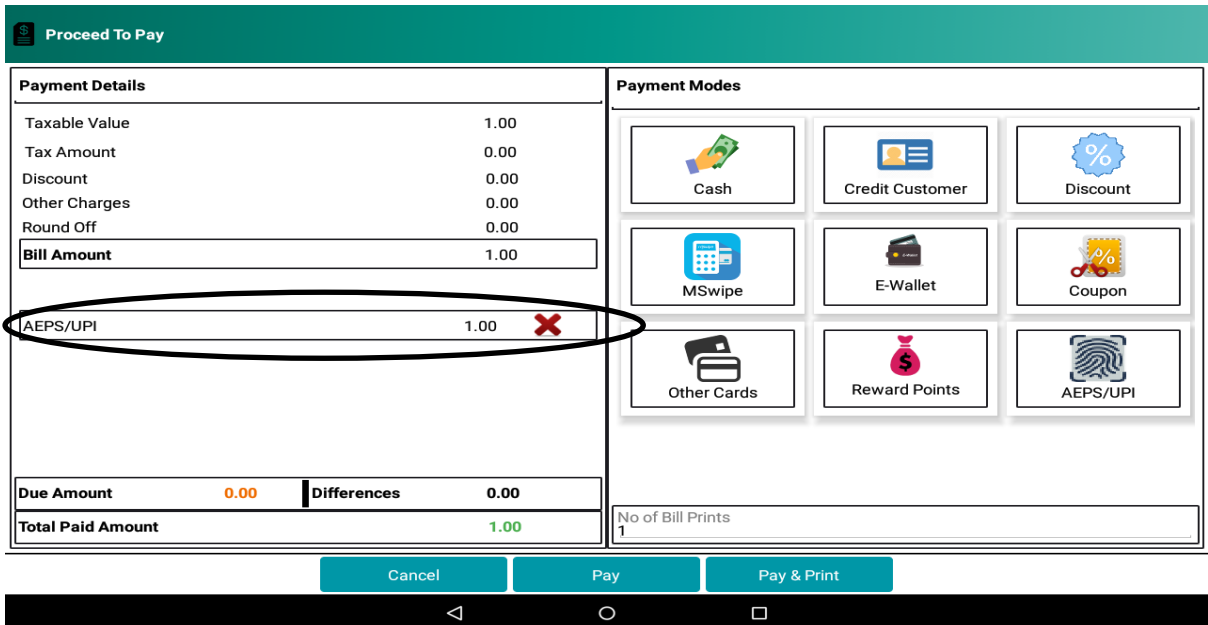


Figure 42 : Upon successful transaction, its reflected in screen



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### 2.9 Cash Payment

User can also opt for cash payment.

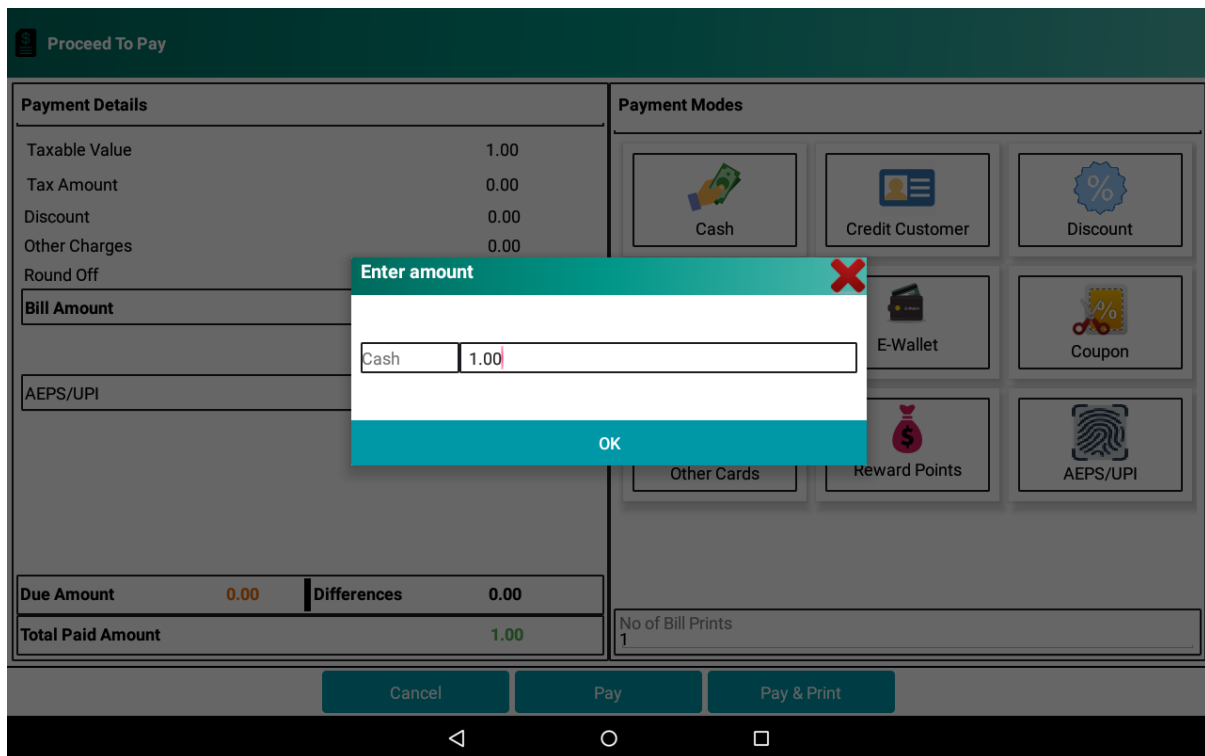


Figure 43 : Enter amount paid by cash



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**Proceed To Pay**

Payment Details		Payment Modes	
Taxable Value	1.00		Cash
Tax Amount	0.00		Credit Customer
Discount	0.00		Discount
Other Charges	0.00		MSwipe
Round Off	0.00		E-Wallet
<b>Bill Amount</b>	<b>1.00</b>		Coupon
Cash	1.00		Other Cards
			Reward Points
			AEPS/UPI
<b>Due Amount</b>	<b>0.00</b>	No of Bill Prints 1	
<b>Differences</b>	<b>0.00</b>		
<b>Total Paid Amount</b>	<b>1.00</b>		

Buttons: Cancel, Pay, Pay & Print

Figure 44 : Same will be reflected in payment screen





## 1. Item Master

---

This allows user to configure an item that he is going to sell to the customer. User can configure following attributes about an item:

- a. Item name
- b. Department
- c. Category
- d. Brand
- e. Three different rates (Retail Price, MRP, Whole Sale Price) {which rate is to apply can be chosen at the time of billing. [See Detail](#) in Section 2.}
- f. Quantity
- g. Unit of measurement
- h. CGST, SGST, IGST and cess tax if applicable
- i. Short code
- j. HSN code
- k. Image for item
- l. Active/Inactive

These attributes can be modified for an existing item as well. He can also upload an image for the item for a visual reference.

For huge amount of data about items, user can use a .csv file to import/load items from that file.

**Note:**

1. *Previous data will be replaced on loading a .csv file. To save the previous data we recommend you to create a backup of the database first.*
2. *Two or more items with same name, barcode, UOM, but different MRPs can be added and cannot be added if MRP is also same.*



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The screenshot shows the 'Item Master' application interface. It features a search bar at the top (1) with a magnifying glass icon. Below the search bar are filter options (2) for 'All', 'Brand', 'Department', 'Category', 'Active', and 'Inactive'. A table (3) lists items with columns for Name, Qty, UOM, Retail Price, and GST Tax. The table contains 18 rows of item data. At the bottom of the table are buttons for 'Clear' (7), 'Generate CSV' (8), 'Select File', 'Browse File' (9), and 'Upload File' (10). A count of '531' (4) and an 'Add Item' button (5) are located in the top right corner. A refresh icon (6) is also present in the top right.

Figure 45: Item Master

Label	Field	Description
1	Barcode, Item name or Short Code	Items can be searched by barcode, Item name and Short Codes.
2	Filters	List of items can be filtered by applying one of the filters e.g.: All, Brand, Department, Category, Active and Inactive.
3	Item List	List of the items according to the filter applied.
4	Count	Number of items in the list showing.
5	Add Item	Add new Item. <a href="#">See Details</a> in Section 4.1.
6	Refresh	To refresh the list.
7	Clear	Clears all the fields.



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8	Generate Sample CSV	Generates a sample CSV. Patch where sample CSV is stored: Device Storage >WeP_Retail_CSVs
9	Browse File	Browse CSV file present in device's memory for bulk upload.
10	Upload file	Bulk upload of item details into application.

1.1 Add a new Item

The screenshot shows the 'Add New Item' form with the following fields and callouts:

- Item Information:**
  - Barcode (1)
  - Item Short Name\* (2): Casual shoes
  - Item Long Name (3): Casual daily wear shoes
  - Short Code (4): 600
  - UOM\* (5): PAIRS (PRS)
  - Brand (6): puma
  - Department (7): casual
  - Category (8): shoes
  - Retail Price\* (9): 899
  - MRP (10): 999
  - Whole Sale Price (11): 899
  - Qty (12): 30
  - HSNCode (13): HSN600
  - Discount% (14): 10.01
  - Discount Amount (15): 100.00
- GST Tax Rates (16):**
  - CGST Rate: 3
  - SGST Rate: 3
  - IGST Rate: 6.00
  - cess Rate: 0
- Image & Status (17):**
  - Image placeholder (17)
  - Browse Image button (18)
  - Fav icon (18)
  - Active status (19)
- Buttons (20-22):**
  - Save button (20)
  - Clear button (21)
  - Close button (22)

Figure 46: Add a new item

Label	Field	Description
1	Barcode	Barcode of the item.
2	Item Short Name*	Short name for an item. Items can be searched by short name.
3	Item Long Name	Long name for an item.



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4	Short Code	A Short code for item.
5	UOM	Unit of Measurement for item.
6	Brand	Brand to which that item belongs to. (Can be configured in configuration. <a href="#">See details</a> in Sections 9.3.)
7	Department	Department to which that item belongs to. (Can be configured in configuration. <a href="#">See details</a> in Section 9.1.)
8	Category	Category of the item. (Can be configured in configuration. <a href="#">See details</a> in Section 9.2.)
9	Retail Price	Retail Price for the item.
10	MRP	MRP of the item.
11	Whole Sale Price	Whole Sale Price of the item.
12	Quantity	Present quantity of the item.
13	HSN code	HSN code for the item.
14	Discount Percent	Discount percent will be calculated according to retail price and MRP entered by user. E.g.: $(\text{Discount Amount}/\text{MRP}) * 100$
15	Discount Amount	Discount amount will be calculated according to retail price and MRP entered by the user. E.g.: $\text{MRP} - \text{Retail Price} = \text{Discount Amount}$
16	CGST/SGST/IGST/cess	CGST/SGST/IGST in percentage and cess rate in percentage. (If applicable)
17	Browse Image	Image for the item.
18	Favourite	To mark an item as Favourite. User can sort out favourite items in billing screen.
19	Active/Inactive	Active status of an item.



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20	Save	Save an item.
21	Clear	Clears all the fields.
22	Close	Closes the current screen.

### 1.1.1 Configuring Barcode Scanner (Recommended)

For using barcode of an item, user needs to configure barcode scanner to add line feed suffix.

For example: In case of Honeywell Barcode scanner, use below barcodes to turn on & off the line feed suffix.

**Warning:** Without line feed user won't be able to add an item directly into KOT after scanning barcode rather, it will show the item in barcode search results and user has to select the item from there.



Figure 47: Turn on line feed suffix



Figure 48: Turn off line feed suffix



## 2. Customer Master

This application also provides a facility to the user to add a record of his regular/premium customers and record can be updated later on. User can search for the customer by customer's mobile number or by customer's name.

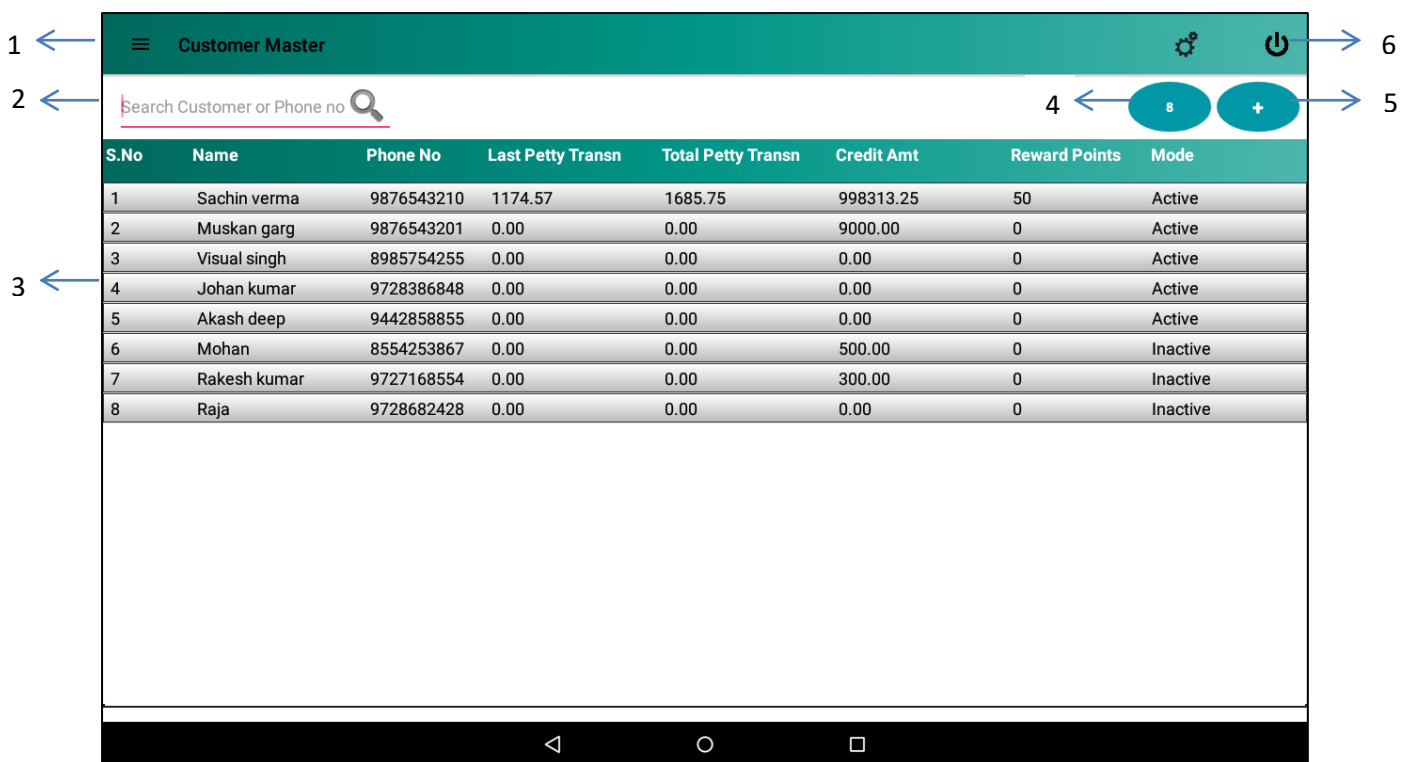


Figure 49: Customer Master Screen

Label	Field	Description
1	Navigation	Navigate to other modules.
2	Search Customer	Search for a customer either by his name or phone number.
3	Customer's List	List of all customers.
4	Customer's count	Shows the total number of customer.



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5	Add a new customer	Add button to add a new customer.
6	Menu	Menu to navigate to settings.

### 2.1 Add a new customer

Click on “Add” button in customer master screen a new screen will be opened. Enter customer details here.

**Customer Master**

Search Customer or Phone no

S.No	Name	Phone No	Last Petty Transn	Total Petty Transn	Credit Amt	Reward Points	Mode
1	Sachin verma	9876543210	1174.57	1685.75	998313.25	50	Active
2	Muskan garg	9876543201	0.00	0.00	9000.00	0	Active

**Add New Customer**

**Personal Info**

GSTIN 09ANTPA0870E1Z6 → 1      Customer Name\* Ashish → 2      Phone No\* 9147852368 → 3

Email Id ashish.gupta@wepdigital.com → 4      Reward Points → 5      Address\* WeP Solutions limited, 40/1A, Basappa complex → 6

Credit Amt → 7      Credit Limit 2000 → 8      Opening Balance 1000 → 9

Active  → 10

Save → 11      Clear → 12      Close → 13

Figure 50: Add a new customer screen



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<b>Label</b>	<b>Field</b>	<b>Description</b>
1	GSTIN	Customer's GSTIN.
2	Customer's Name	Name of the customer.
3	Mobile no.	Customer's mobile no.
4	Email Id	Customer's Email ID.
5	Reward Points	Customer's reward points that he earned.
6	Address	Customer's Address.
7	Credit Amount	Customer's credit amount on the user.
8	Credit Limit	Maximum amount a customer can credit on merchant.
9	Opening Balance	Amount deposited for the first time by customer.
10	Active/Inactive	Active or Inactive status of the customer.
11	Save	Save the new customer.
12	Clear	Clears the fields.
13	Close	Close the current screen.





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## 2.2 Edit/Update a Customer

To edit or update detail of a customer user needs to click on the customer from customer's result. On editing a customer a field for Deposit Amount will be enabled and Opening Balance field will be disabled (non-editable). Deposit amount will be added into Credit Amount.

Personal Info		
GSTIN 09ANTPA0870E1Z6	Customer Name* Ashish	Phone No* 9147852368
Email Id ashish.gupta@wepdigital.com	Reward Points 0	Address* WeP Solutions limited, 40/1A, Basappa complex
Credit Amt 1000.0	Credit Limit 2000.0	Opening Balance 1000.00
Deposit Amt 300	Active <input checked="" type="checkbox"/>	

Update Clear Close

Figure 51: Edit or Update a Customer

## 2.3 Search a customer

Application allows user to search an added customer by his name or by phone number.



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The screenshot shows the 'Customer Master' app interface. At the top, there is a search bar with the letter 'a' entered. Below the search bar, a list of customer records is displayed. The records are as follows:

S	Name	Phone No	Last Petty Transn	Total Petty Transn	Credit Amt	Reward Points	Mode
1	Ashish - 9147852368	9147852368	0.00	0.00	1000.00	0	Active
2	Muskan garg	9876543201	0.00	0.00	9000.00	0	Active
3	Visual singh	8985754255	0.00	0.00	0.00	0	Active
4	Johan kumar	9728386848	0.00	0.00	0.00	0	Active
5	Akash deep	9442858855	0.00	0.00	0.00	0	Active
6	Ashish	9147852368	0.00	0.00	1000.00	0	Active

Figure 52: Search customer by name

The screenshot shows the 'Customer Master' app interface. At the top, there is a search bar with the number '8' entered. Below the search bar, a list of customer records is displayed. The records are as follows:

S	Name	Phone No	Last Petty Transn	Total Petty Transn	Credit Amt	Reward Points	Mode
1	Mohan - 8554253867	8554253867	1174.57	1685.75	998313.25	50	Active
2	Muskan garg	9876543201	0.00	0.00	9000.00	0	Active
3	Visual singh	8985754255	0.00	0.00	0.00	0	Active
4	Johan kumar	9728386848	0.00	0.00	0.00	0	Active
5	Akash deep	9442858855	0.00	0.00	0.00	0	Active
6	Ashish	9147852368	0.00	0.00	1000.00	0	Active

Figure 53: Search customer by phone number



### 3. User Management

This screen allows user to insert and delete a record of an employee and assign a role to him. User can also modify the employee details and change the role assigned to him earlier. *Default user admin can neither be updated nor deleted.*

S.No	Name	Role	State
1	admin	Manager	Active
2	Ajay Sharma	Accountant	Active
3	Priyal Kapoor	Salesman	Active
4	Kamal kanth	Operator	InActive

Figure 54: User Management

Label	Field	Description
1	Name	Name of the user.
2	Mobile	Contact number of the user.
3	Login	Username of the person.
4	Password	Password to login into the system.

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5	Role	Role of the person.
6	Designation	Designation of the person.
7	Aadhar	Aadhar card number.
8	Email	Email id of the person.
9	Address	Address of the person.
10	Sales Man ID	For users whose role is sales man. The field will be editable when role selected is sales man. The field will be visible if it is enabled in settings. <a href="#">See Details</a> in Section 12.3.
11	Active/Inactive	Active or Inactive status of the user.
12	User's List	List of the user added.
13	Submit	Save/Updates the details.
14	Clear	Clear the whole form.



## 4. Add Role

Add role screen allows user to define roles that can be assigned to other employees. User can also change the access for that particular role. e.g.: Sweeper is the new role that is added by the user. Now user can configure, what module can be accessed by that role.

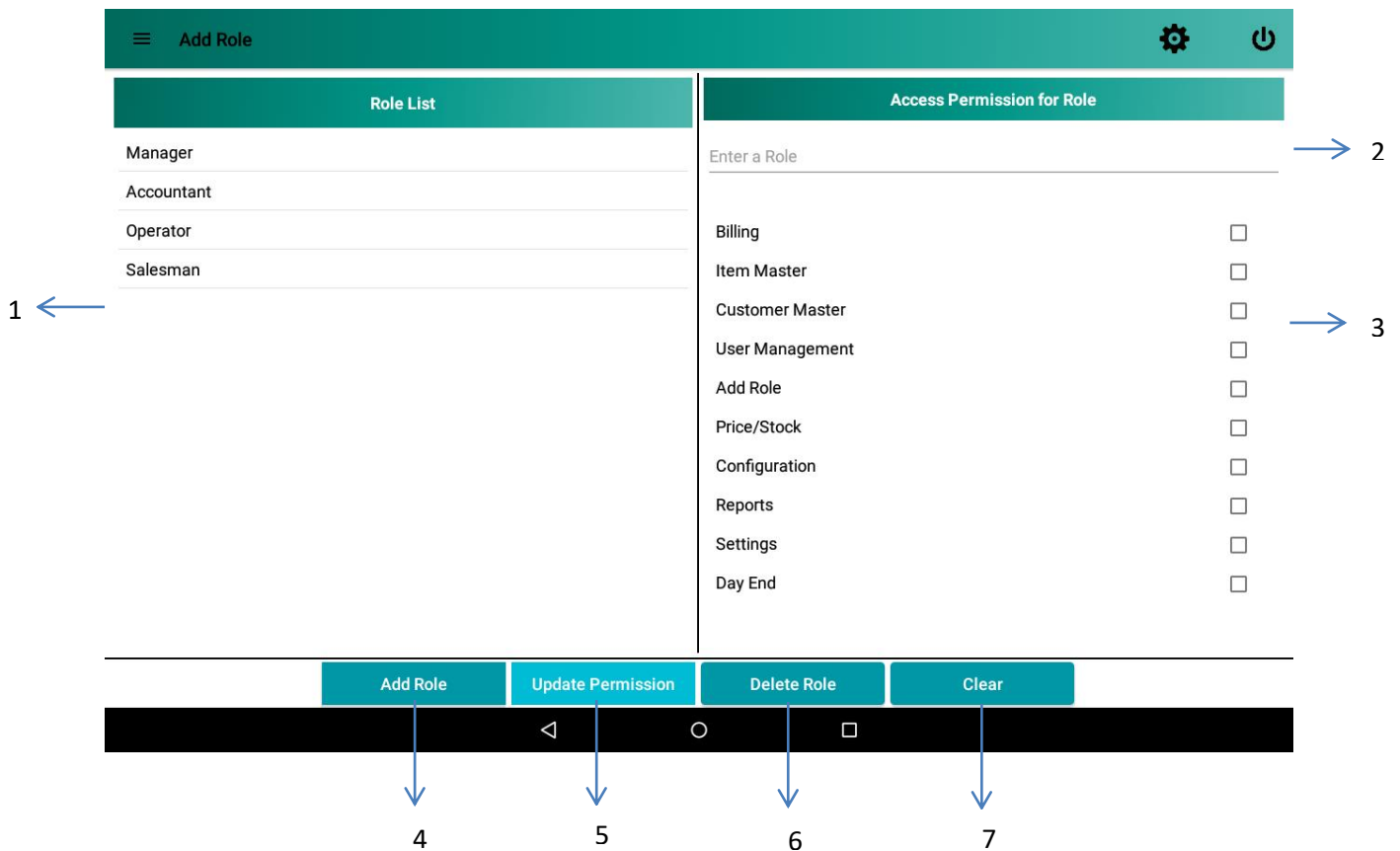


Figure 55: Add role screen

Label	Field	Description
1	Role List	List of all roles including pre-added roles by system and user added roles.
2	Role Name	Name of the role user wants to add.
3	Permissions	List of permissions user wants to give to that role.
4	Add Role	Add a new role into database.



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5	Update Permissions	Update permissions of an existing role.
6	Delete Role	Delete a role added by user only. <u><i>Note: User cannot delete system added roles like "Manager".</i></u>
7	Clear	Clears all field.



## 5. Price and Stock

Price & Stock screen facilitates user to modify stock and three different rates for that item in outward supply.

*Note: New stock will be added to existing stock.*



Figure 56: Price & Stock

Label	Field	Description
1	Barcode or Item Name	Search an Item by barcode and item name.
2	Item Count	Number of items in the list.
3	Filters	Allows user to filter out the items according to the provided filters.
4	Items List	List of the items.



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The screenshot displays the 'Price/Stock' application interface. A list of items is shown on the left, and a 'Update Price and Stock' pop-up is overlaid on the right. The pop-up contains the following fields and values:

Field	Value
ItemName	WHITE CHOLLE
Existing Stock	320.2
New Stock	
MRP	48.0
Retail Price*	45.0
Whole Sale Price	45.0

At the bottom of the pop-up are three buttons: 'Update', 'Clear', and 'Close'. The background list includes items like RICE, WHITE CHOLLE, MILK, BREADS, MINERAL WATER, OIL, GARLIC, POTATOES, GARAM MASALA, GINGER, HONEY, TURMERIC, CORN, CURRY LEAVES, and GREEN CHILLI. The 'Whole Sale Price' column is visible on the right side of the list.

Figure 57 : Update screen pop up upon clicking item in the list





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<b>Label</b>	<b>Field</b>	<b>Description</b>
1	Item Name	Name of the item
2	Existing Stock	Already existing stock of item
3	New Stock	New stock of item to be added
4	MRP	MRP of item(configurable)
5	Retail Price	Retail price of item(configurable)
6	Wholesale Price	Wholesale price of item(configurable)
7	Update	Updates the entries
8	Clear	Clear the entries in pop up
9	Close	Close the pop up



## 6. Configuration

---

Configuration screen allows user to configure the application by providing few options that will help him a lot to manage many things.

- User can manage by categorizing items under department and category.
- User can configure various Payments/Receipts in an organized manner.
- Discounts & Coupons can be configured and availed to the customer at the time of billing.
- User can also add “**Othercharges**” which are customizable and applicable while billing.
- User can configure loyalty and brands points.

### 6.1 Department

A shop can have multiple departments according to what type of items they are providing.  
e.g.: Garments, Foot wears.

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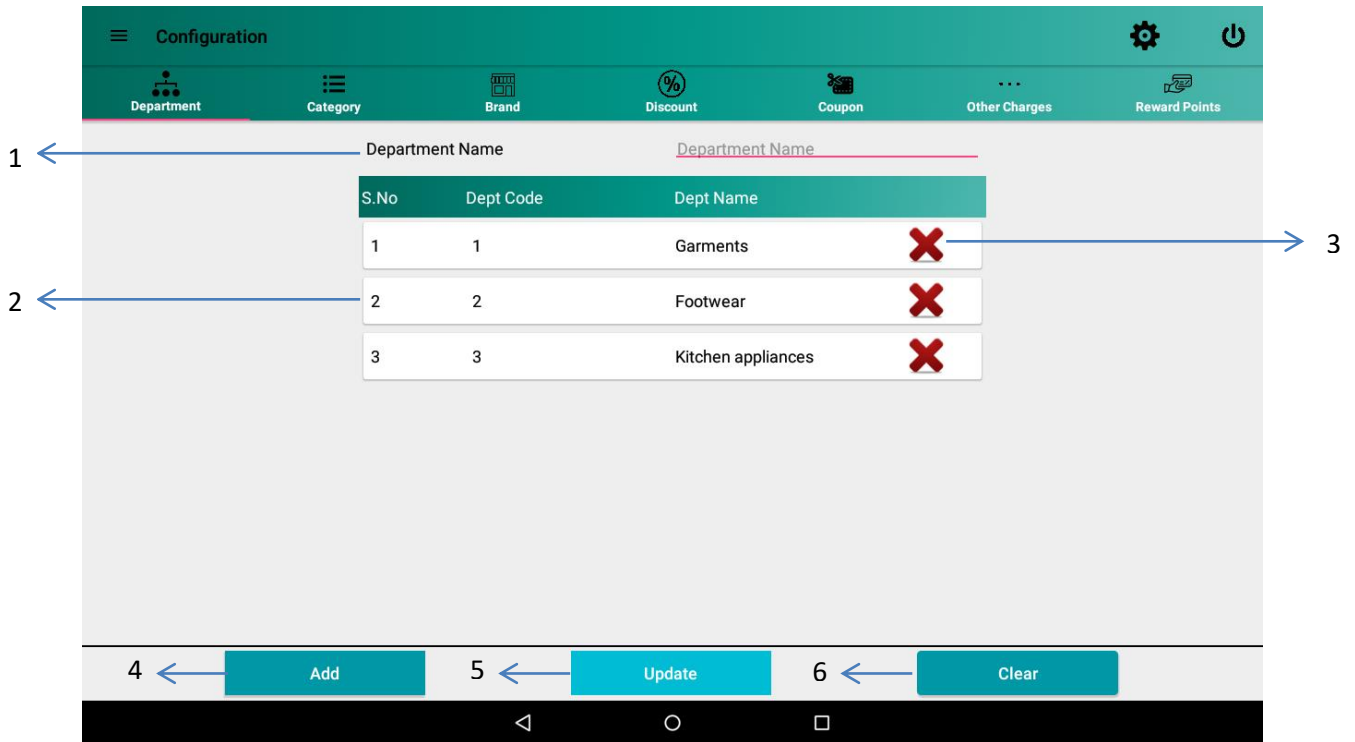


Figure 58: Department Configuration

Label	Field	Description
1	Department name	Name of the department user wants to add.
2	Department List	List of the departments.
3	Delete	To delete a department.
4	Add	Button to add new department name into database.
5	Update	Update details of an existing department.
6	Clear	Clears all the fields.

### 6.2 Category

User can categorize the items in their own way. e.g.: a shop has a department which take care of garments. Now garments can be categorized into “Formals” & “Casuals”.



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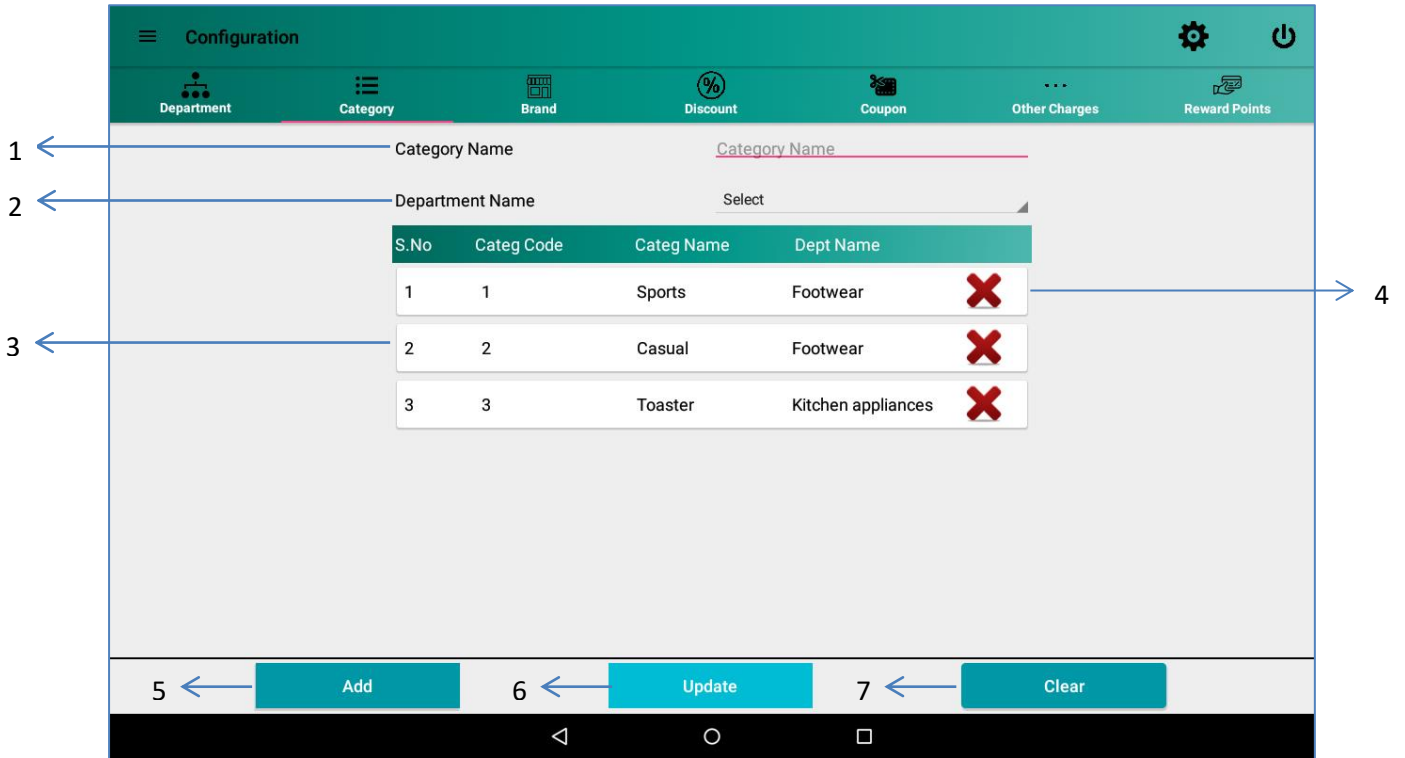


Figure 59: Category Configurations

Label	Field	Description
1	Category name	Name of the Category user wants to add.
2	Department Name	Name of the department to which user wants to link the category.
3	Category List	List of the Category.
4	Delete	To delete a category.
5	Add	Button to add new Category name into database.
6	Update	Update details of an existing Category.
7	Clear	Clear will clear all the fields.

### 6.3 Brand

User can configure all the brands he is dealing with.

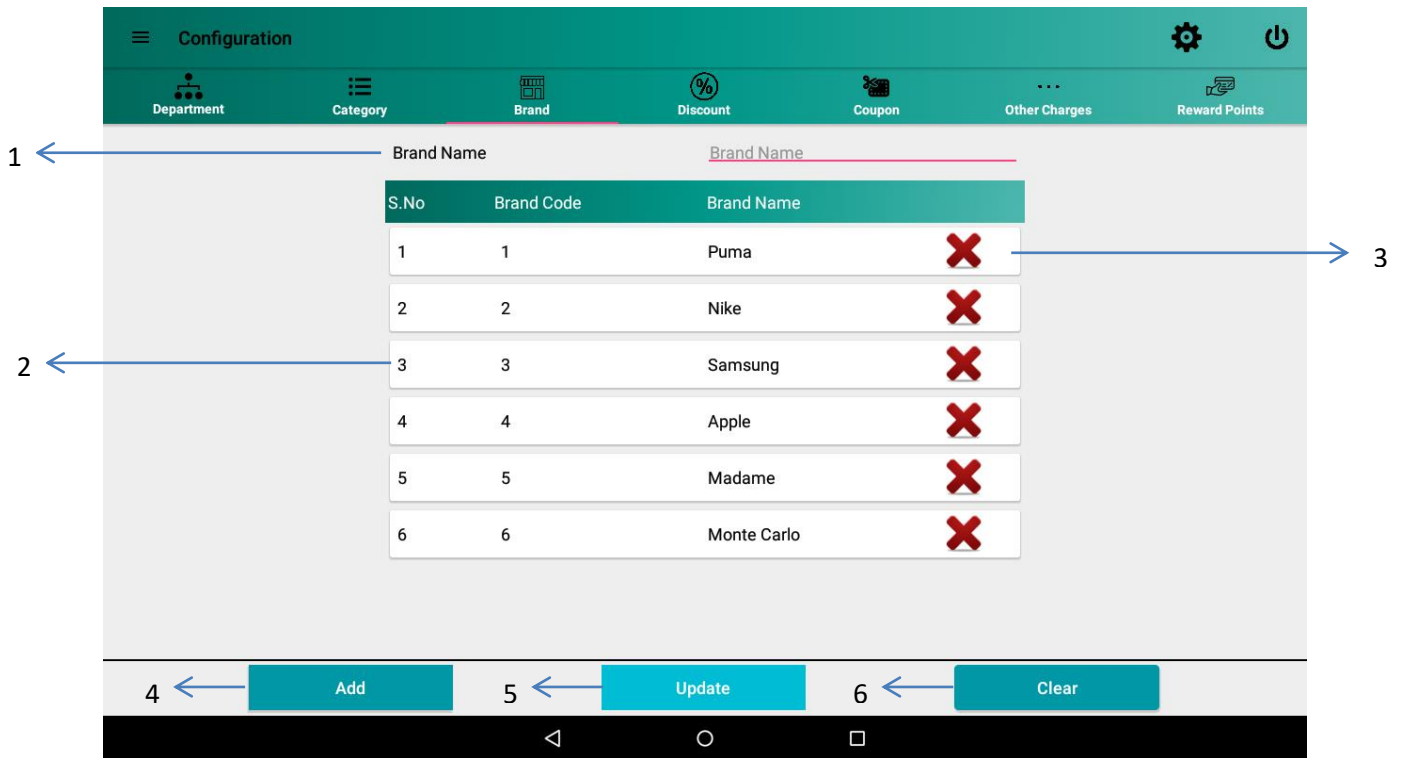


Figure 60: Brand Configuration

Label	Field	Description
1	Brand name	Name of the brand user wants to add.
2	Brand List	List of the brands.
3	Delete	To delete a brand.
4	Add	Button to add new brand name into database.
5	Update	Update details of an existing brand.
6	Clear	Clear will clear all the fields.



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### 6.4 Discount

Availing discounts to the customers is now made easy. User can configure various types of discounts, in percentage and can be used at the time of billing.

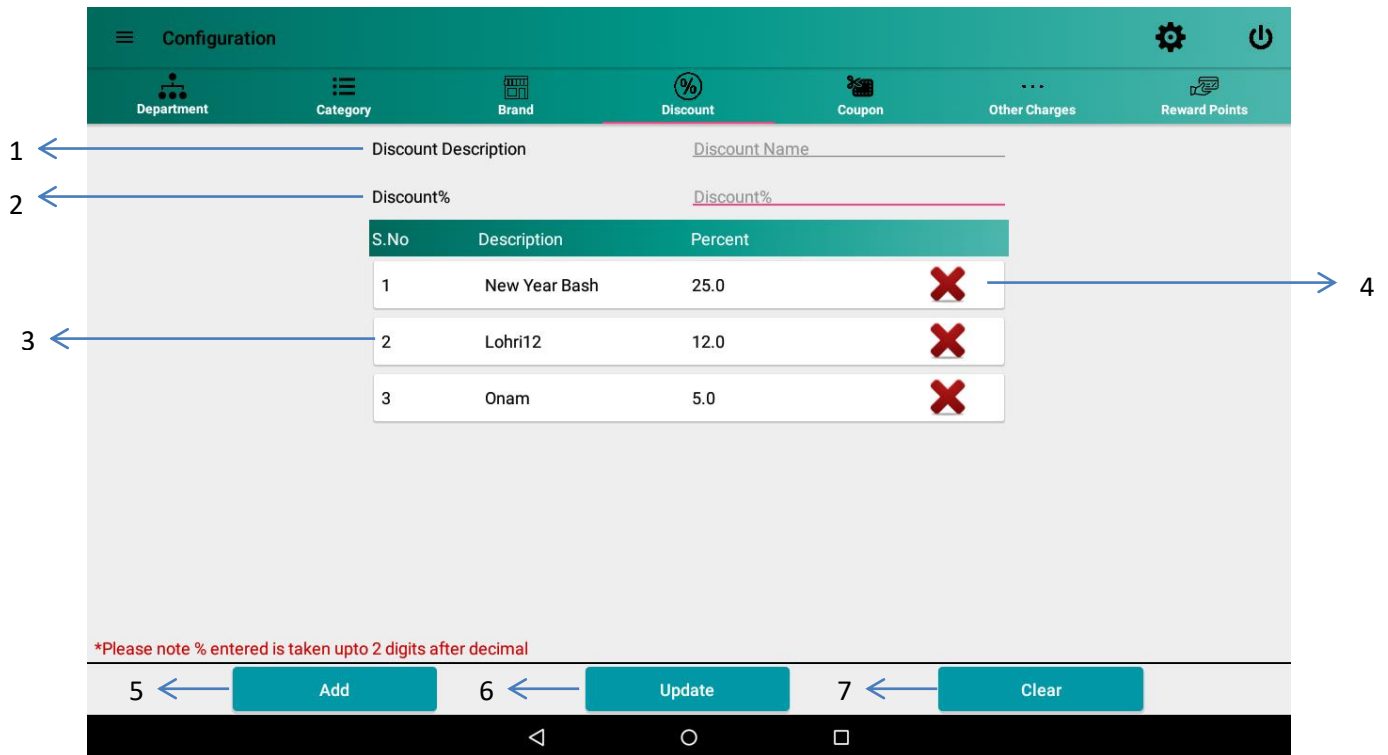


Figure 61: Discount

Label	Field	Description
1	Discount Description	Description of the discount provided by the user.
2	Discount percentage	Discount in percentage.
3	Discount's List	List of all discounts configured in application
4	Delete	Delete a discount record.
5	Add	Button to add discount into database.
6	Update	Update details of an existing discount.

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7	Clear	Clear will clear all the fields.
---	-------	----------------------------------

### 6.5 Coupon

User can configure various coupons with amount and can use them at the time of billing.  
e.g.: Rs.500 cashback.

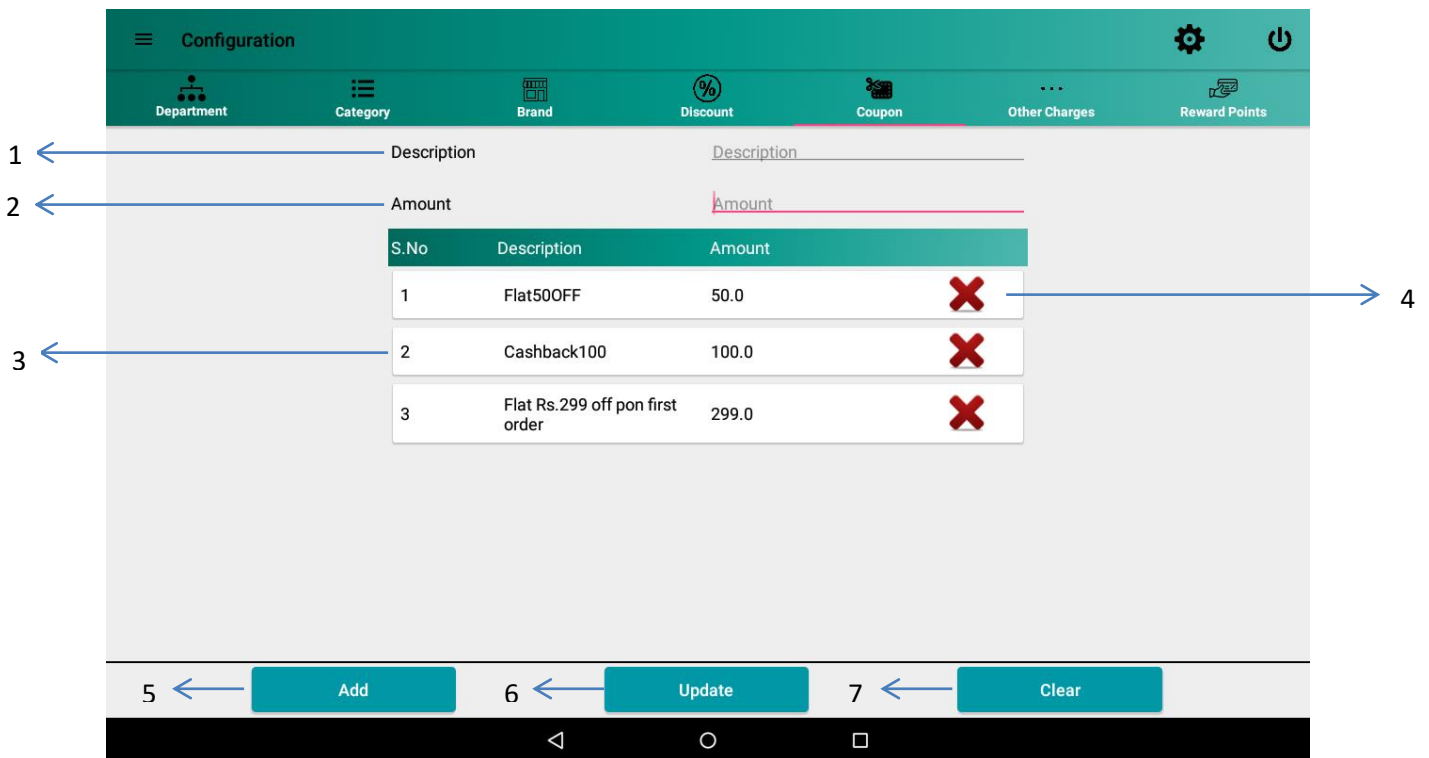


Figure 62: Coupon

Label	Field	Description
1	Coupon Description	Description of the Coupon provided by the user.
2	Coupon Amount	Coupon in amount.
3	Coupon's List	List of all coupons configured in application.
4	Delete	Delete a coupon from the list.
5	Add	Button to add Coupon into database.
6	Update	Update details of an existing Coupon.



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7	Clear	Clear all the fields.
---	-------	-----------------------

### 6.6 Other charges

User can apply extra charges and can decide whether to charge customer or not by clicking on the check box. If check box is checked, then the amount is chargeable and will automatically be added into total bill. e.g.: User can apply other charges (as packing charges).

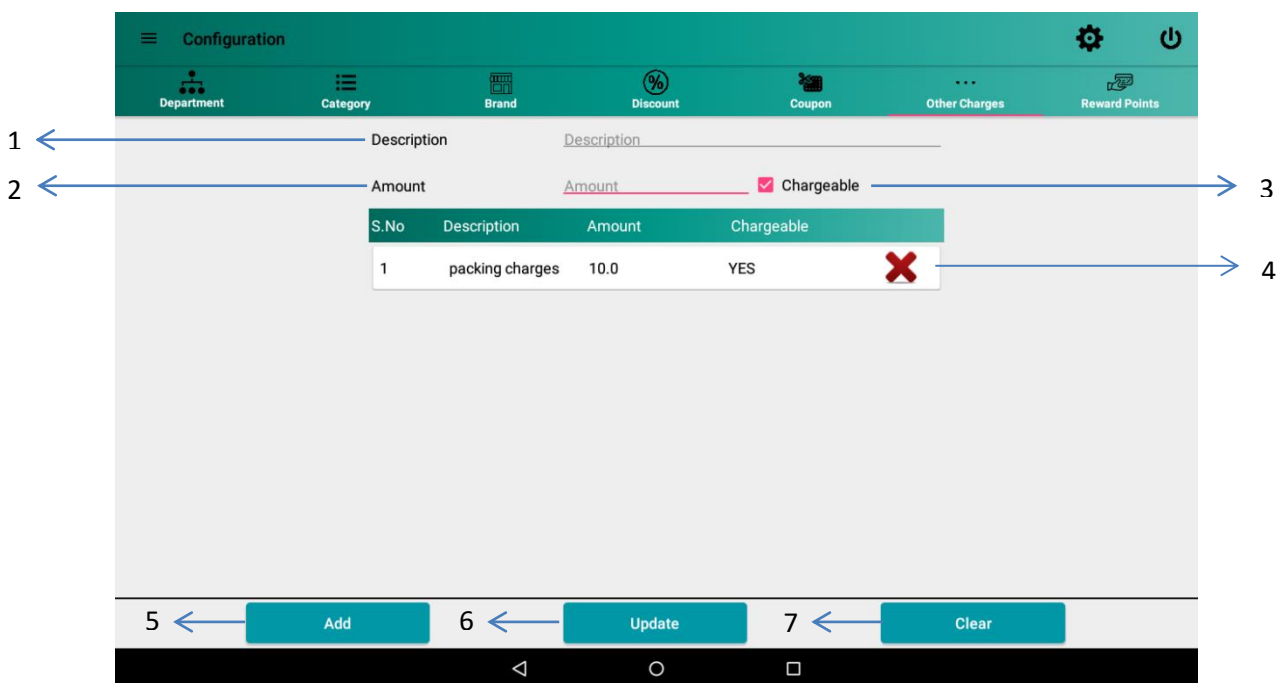


Figure 63: Other charges

Label	Field	Description
1	Other charge Description	Description of the Other charge provided by the user.
2	Other charge Amount	Other charge in amount.
3	Chargeable	Check the checkbox if user wants to charge for this other charges.
4	Delete	Delete Other charge from the list.





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5	Add	Button to add Other charge into database.
6	Update	Update details of an existing Other charge.
7	Clear	Clear will clear all the fields.

### 6.7 Reward Points Configuration

User can configure the amount to be converted into Reward points, minimum points to redeem and etc.

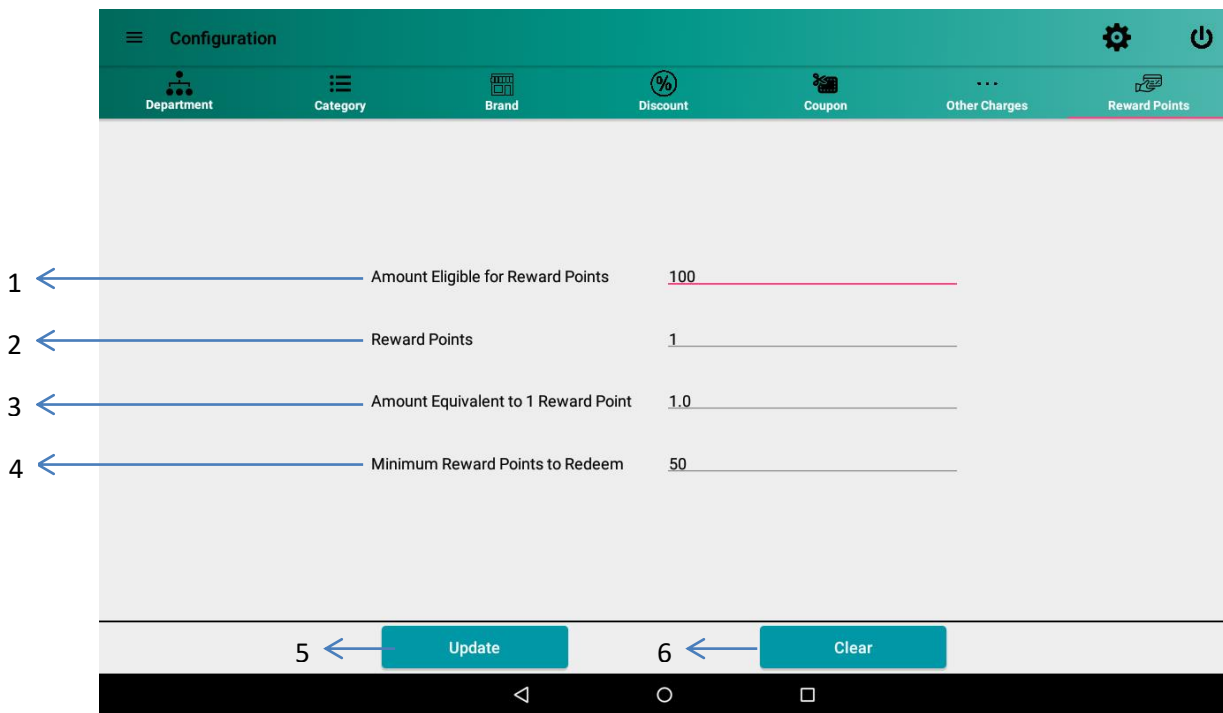


Figure 64: Loyalty Point Configuration

Label	Field	Description
1	Amount conversion in loyalty	How much amount will be equal to the required loyalty point(s).
2	Loyalty Points	How much loyalty points will be given on amount mentioned in <i>Amount conversion in loyalty</i> field.
3	Amount equivalent to 1 loyalty point	How much amount a customer will earn on 1 loyalty point.



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4	Minimum Loyalty Points to Redeem	Minimum loyalty points a customer requires to redeem the points.
5	Update	Update details of an existing Other charge.
6	Clear	Clear will clear all the fields.

## 7. Day End

User can end his day of business by clicking on “Day End” in Navigation Drawer. If Date and Time is set to automatic then application will automatically pick the device’s date and time and if user has set date and time to manual then user will get an option to choose the date on which he wants to end his day. For settings [click here](#) in Section 12.3.

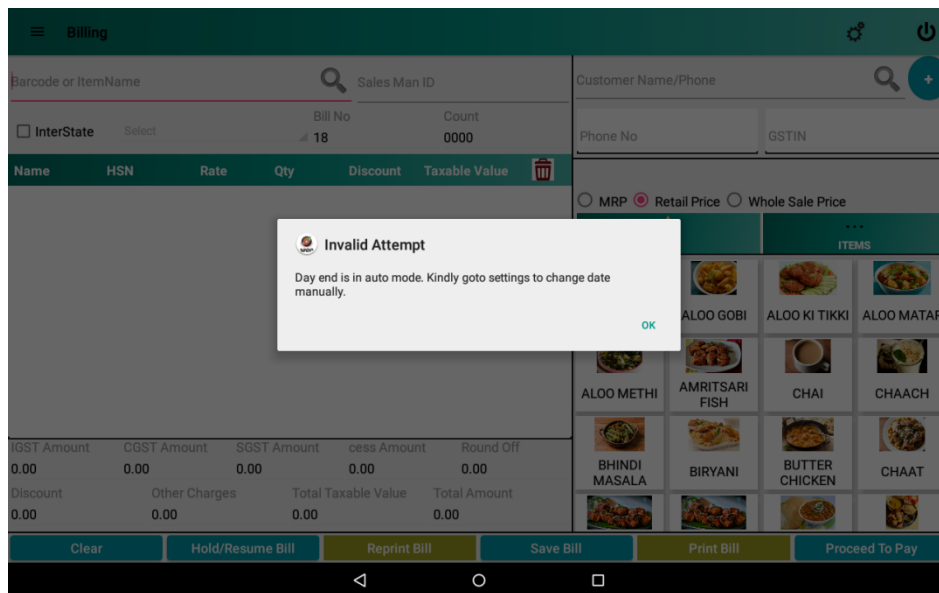


Figure 65: Auto Day End



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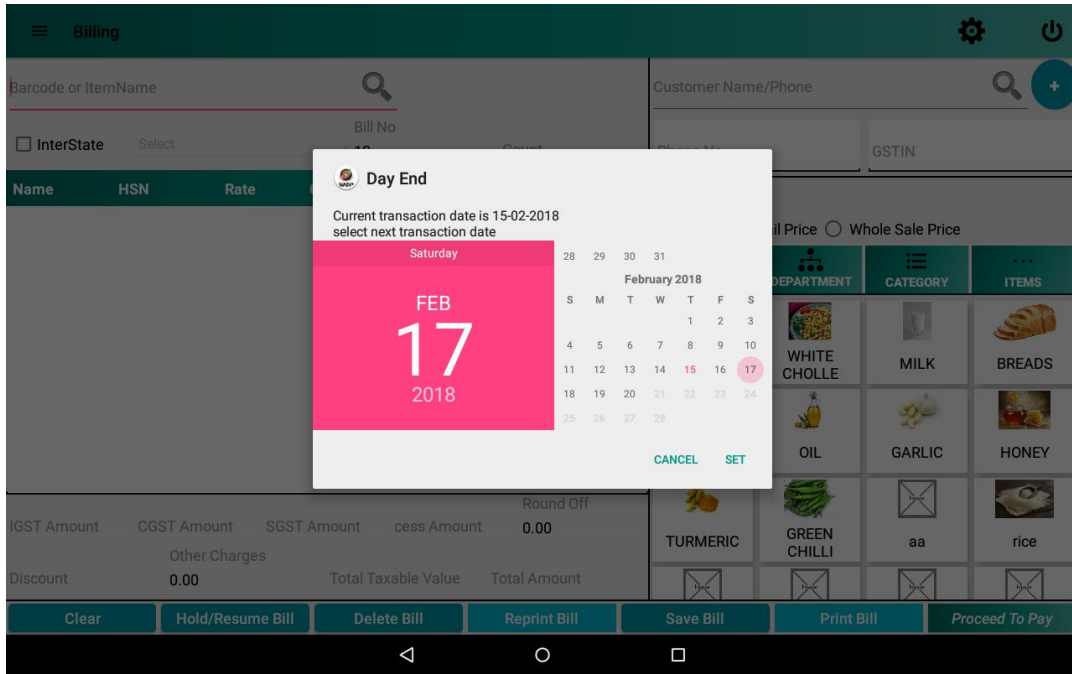


Figure 66: Manual Day End

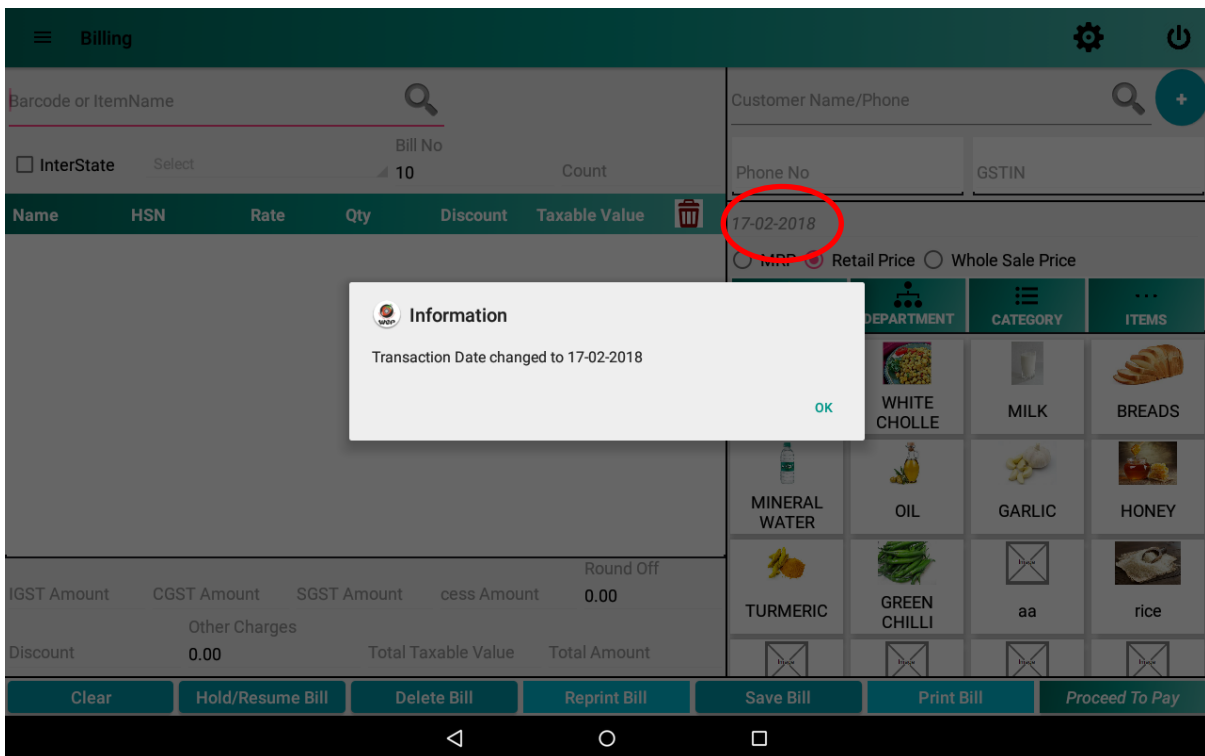


Figure 67: If business date is different from tablet date, then it is reflected in billing screen



## 8. Reports

### 8.1 Sales Report

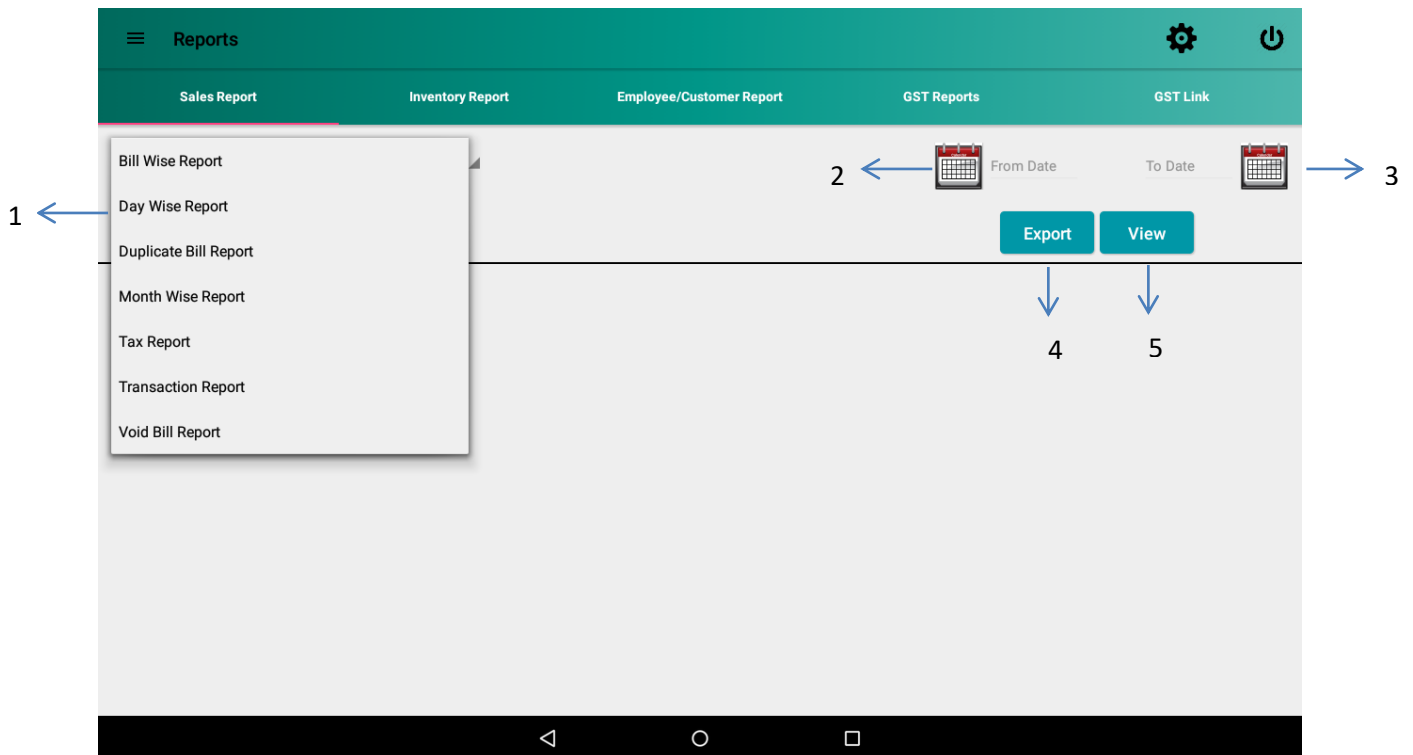


Figure 68: Sales Report

Label	Field	Description
1	Sales Report	Application provides different views in which user can see the sales report.
2	From Date	Start date from which user wants to see the report.
3	To Date	End date to which user wants to see the reports.
4	Export	Allows user to export the report in .csv format.
5	View	Shows report within the range of date mentioned.



## 8.2 Inventory Report

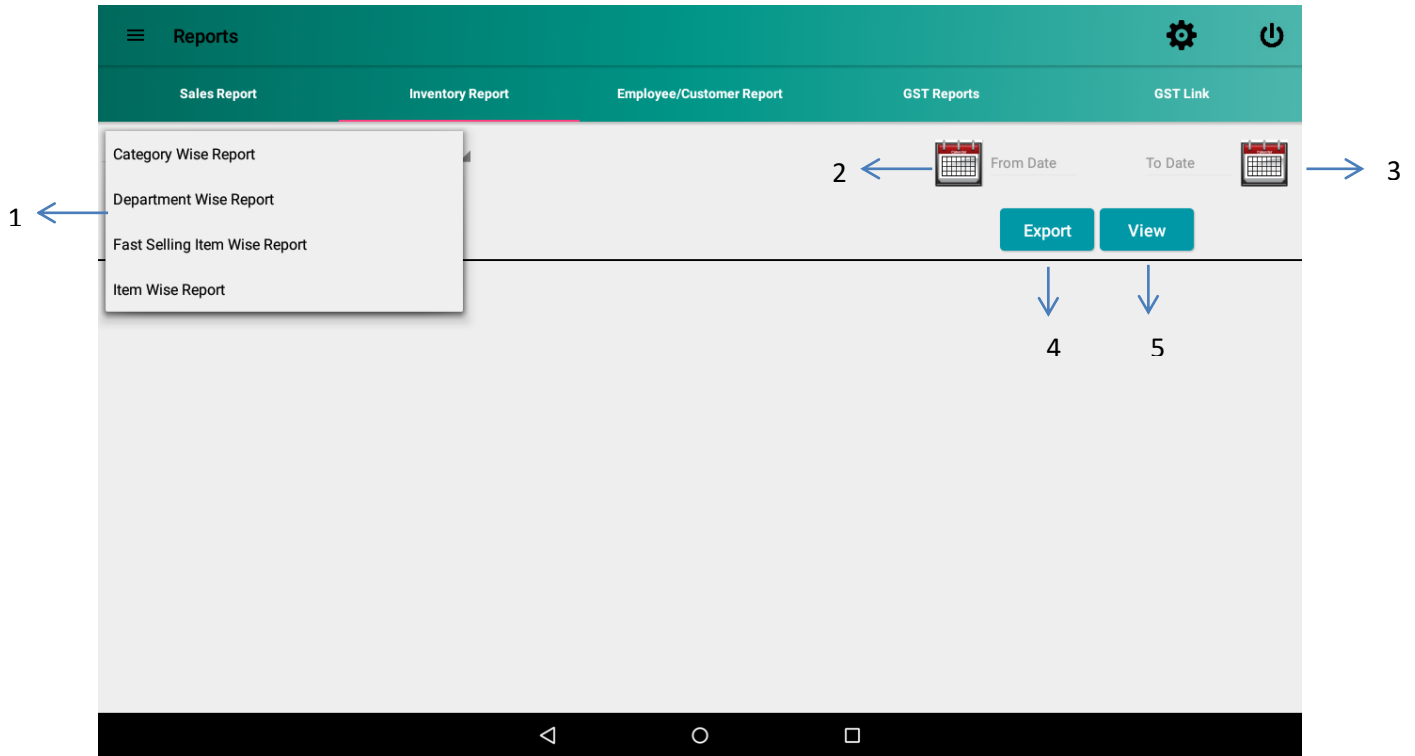


Figure 69: Inventory Report

Label	Field	Description
1	Inventory Report	Application provides different views in which user can see the inventory report.
2	From Date	Start date from which user wants to see the report.
3	To Date	End date to which user wants to see the reports.
4	Export	Allows user to export the report in .csv format.
5	View	Shows report within the range of date mentioned.



### 8.3 Employee/Customer Report

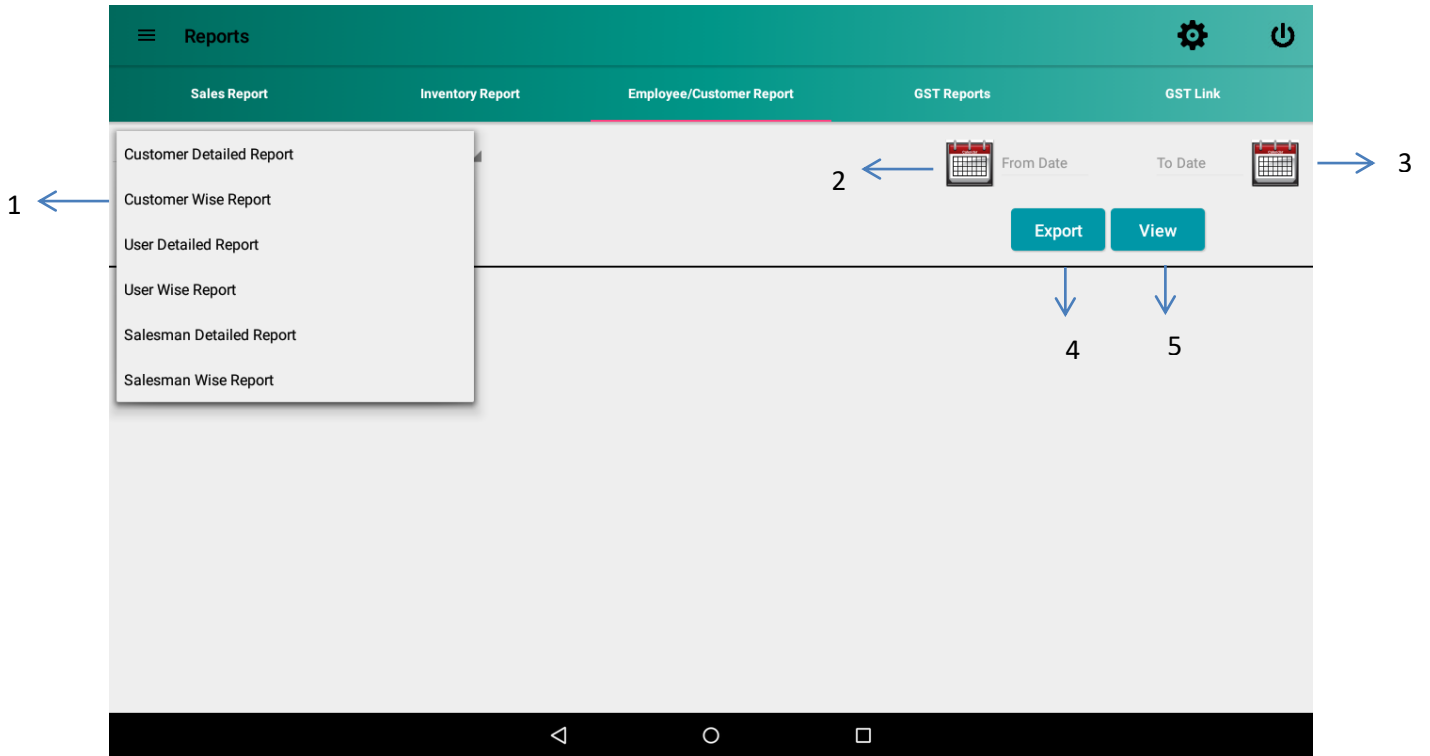


Figure 70: Employee/Customer Report

Label	Field	Description
1	Employee/Customer Report	Application provides different views in which user can see the employee/customer report.
2	From Date	Start date from which user wants to see the report.
3	To Date	End date to which user wants to see the reports.
4	Export	Allows user to export the report in .csv format.
5	View	Shows report within the range of date mentioned.



## 8.4 GST Reports

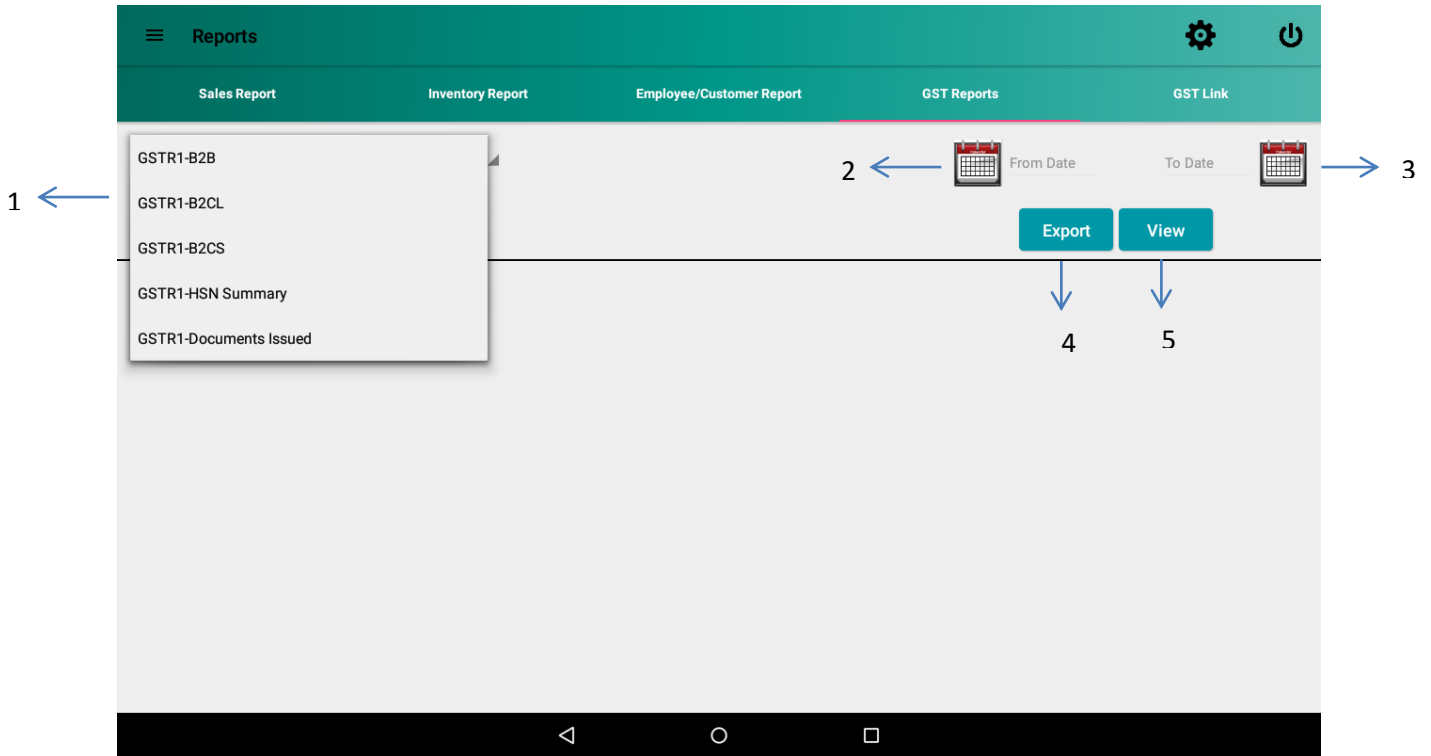


Figure 71: GST Reports

Label	Field	Description
1	GST Report	Application provides different views in which user can see the GST report.
2	From Date	Start date from which user wants to see the report.
3	To Date	End date to which user wants to see the reports.
4	View	Shows report within the range of date mentioned.
5	Close	Closes the reports screen.



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## 8.5 GST Link

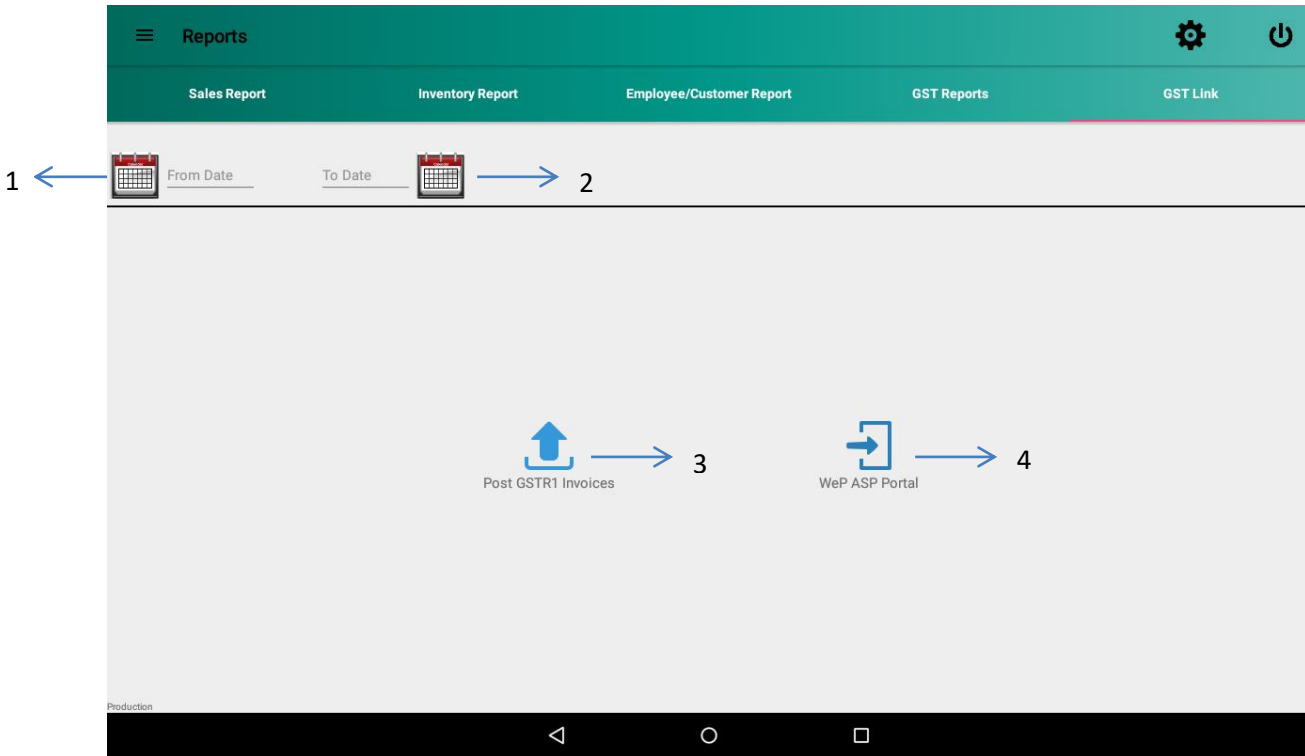


Figure 72: GST Link

Label	Field	Description
1	From Date	Start date from which user wants to see the report.
2	To Date	End date to which user wants to see the reports.
3	Post GSTR1 Invoices	Uploads GSTR1 invoices.
4	WeP ASP Portal	Go to WeP GSP Portal.





## 9. Settings

Settings screen allows user to configure:

- Owner details
- Header and footer that is going to be printed on bill.
- Application settings like Reset all settings, create a backup of current database image and factory reset to erase everything.
- Other settings allow user to set options for date and time, fast billing mode, table splitting and etc.

### 9.1 Owner Details

User can see owner details which he has filled in starting.

**Note:** After printing first Bill/Invoice, user will no longer be able to modify these details. Before that user can modify "Owner's Details" except for GSTIN, Ref No., bill No. & pre-fix.

Field	Value
1 FIRM NAME*	Jaggi sweets
2 GSTIN*	09ANTPA0870E1Z6
3 PHONE*	9876543210
4 E-MAIL*	sachin.verma@wepdigital.com
5 ADDRESS*	Near Anardana market, Baradari chowk, Patiala
6 BillNo Prefix	WEP007
7 POS*	Uttar Pradesh 09
8 Reference No	Jaggi

9 Apply

Figure 73: Owner Details setting



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Label	Field	Description
1	Firm Name	Name of the firm.
2	GSTIN	GSTIN code of the owner.
3	Phone	Phone number of the owner.
4	Email	Email id of the owner.
5	Address	Address of the owner.
6	Bill no prefix	Prefix of bill number.
7	POS	Place of supply of the owner.
8	Reference number	Reference number with respect to WeP GST panel.
9	Apply	Apply changes.

## 9.2 Header & Footer

Header will be printed at the top of the bill and footer will be printed at the end of the bill.

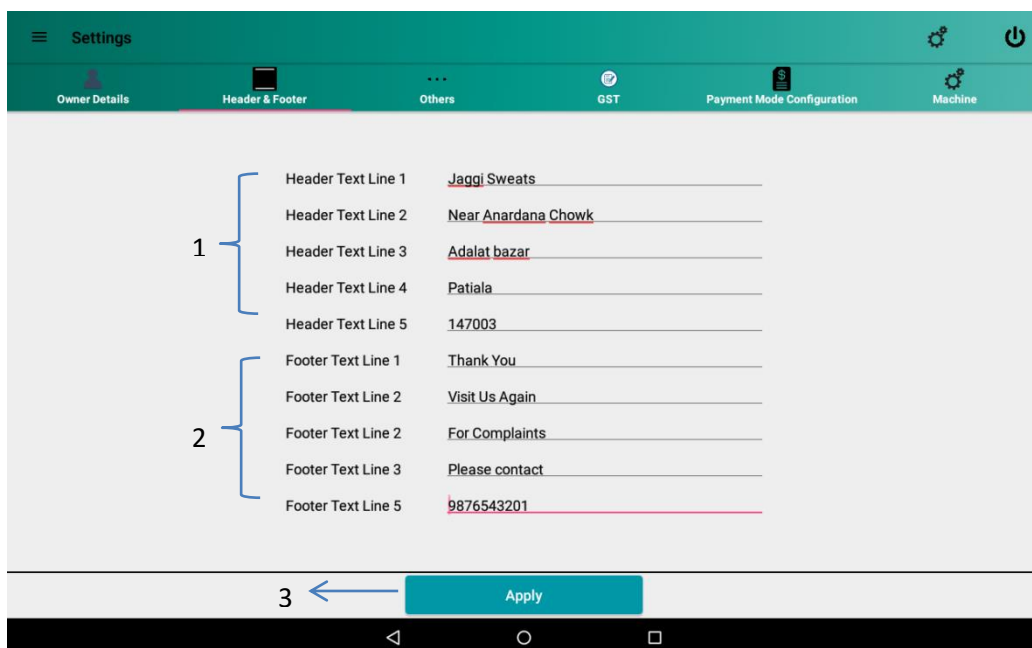


Figure 74: Header and Footer settings



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Label	Field	Description
1	Header	The text will appear in the starting of the bill.
2	Footer	The text will appear in the end of the bill.
3	Apply	Apply changes.

### 9.3 Others

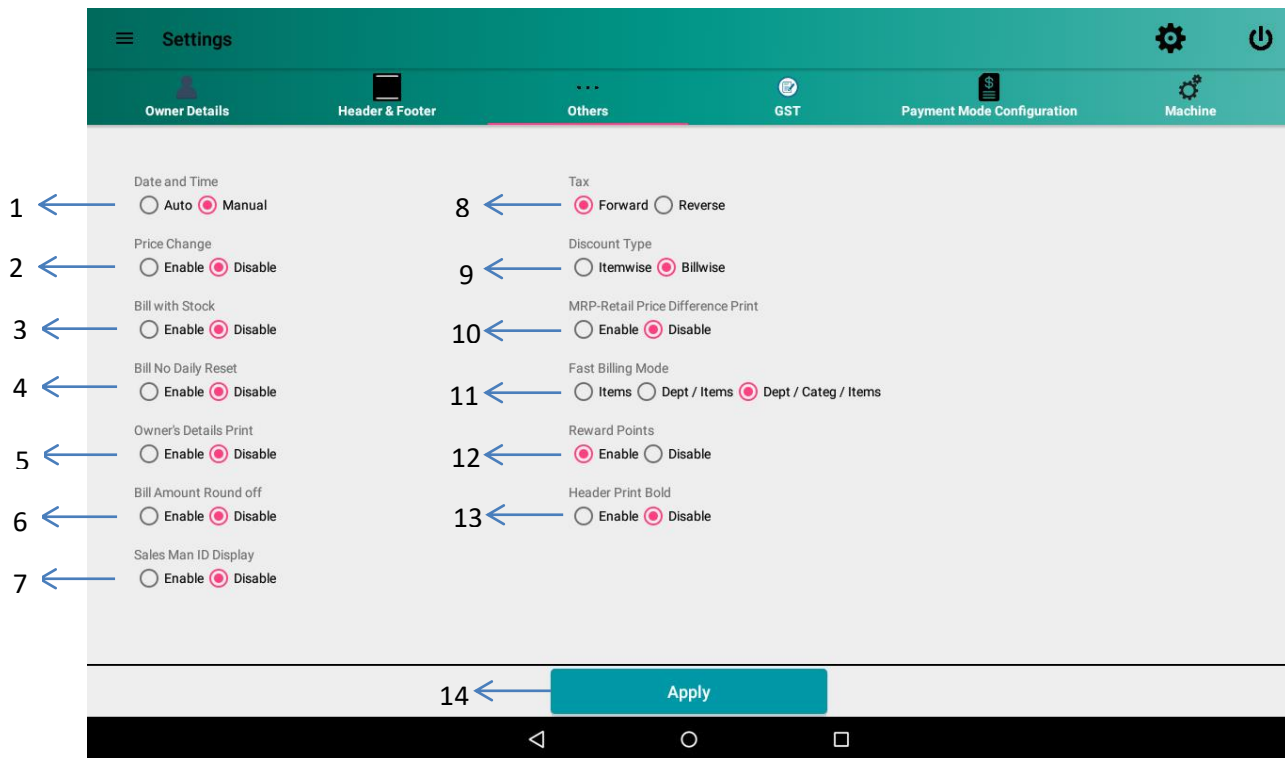


Figure 75: Other setting

Label	Field	Description
1	Date and Time	<b>Auto:</b> Application will automatically picks up the device’s date and time. <b>Manual:</b> User can manually select a date and time.
2	Price Change	If enabled, user has the facility to change the price



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		of an item at the time of billing.
3	Bill with stock	If enabled then on every bill generated, quantity of items will be deducted from the stock.
4	Bill no. daily reset	If enabled bill number will be changed to 1 count after a day is ended.
5	Owner's details print	If enabled, then own details will be printed on bill.
6	Bill amount round off	If enabled, the bill amount will be rounded off.
7	Sales Man ID Display	If enabled, a field to enter sales man id will appear in billing screen and User Management screen.
8	Tax	Allows user to select a Type of Tax from Forward and Reverse tax.  <i><u>Note: Bill-wise Discount and cess is not applicable in Reverse Tax. Only Item-wise discount is applicable.</u></i>
9	Discount type	User can provide discount on item or on bill.
10	MRP Retail Price Discount Print	If enabled, discount on MRP retail price will be printed on bill.
11	Fast Billing Mode	<b>Items:</b> Only items will be shown at the time of billing.  <b>Department/Item:</b> Department and Items both will be shown at the time of billing. User can sort items according to departments.  <b>Department/Category/Item:</b> All three things will be shown at the time of billing and user can sort items according to departments and then by



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		category.
12	Reward Points	If enabled, customer will get reward points on every purchase he makes.
13	Header print bold	If enabled, header will be printed in bold.
14	Apply	Apply changes.

### 9.4 GST

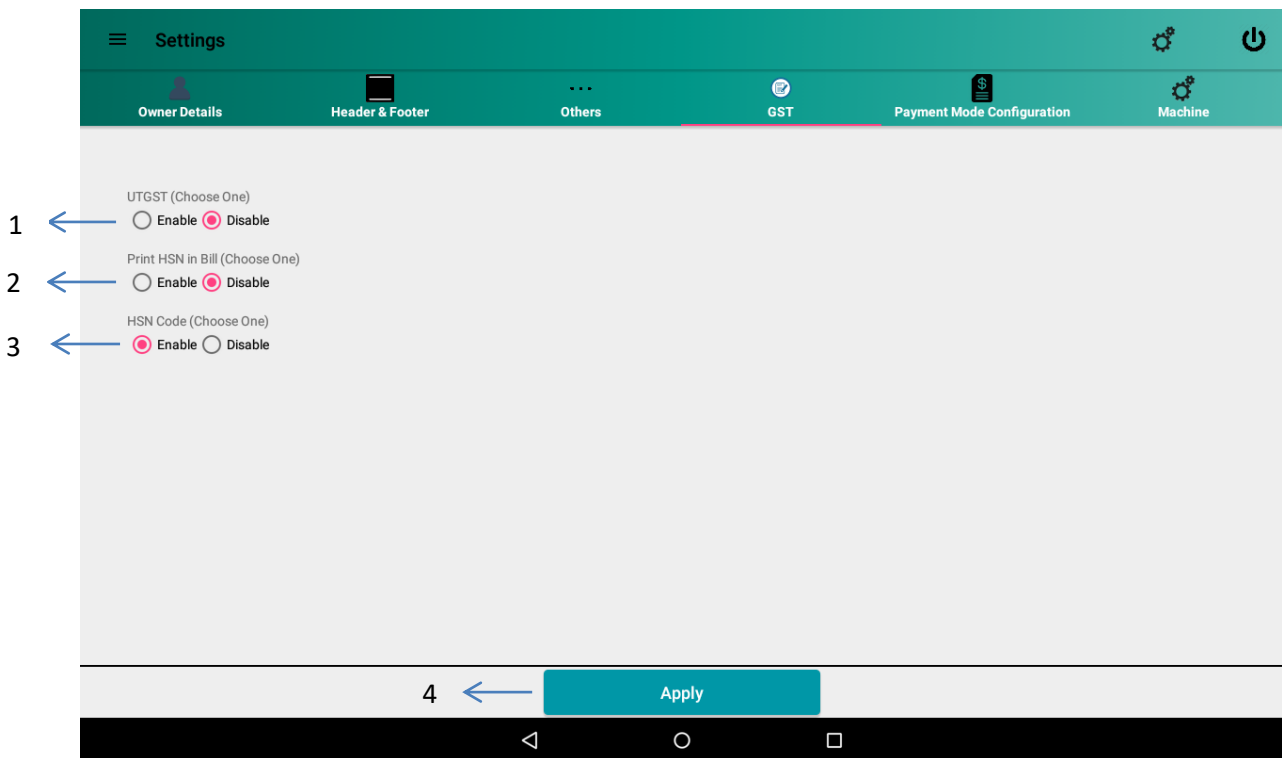


Figure 76: GST setting

Label	Field	Description
1	UTGST	If enabled, then UTGST will be applicable on items.



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2	Print HSN in Bill	If enabled, then HSN will be printed in bill.
3	HSN Code	If enabled, user can configure HSN code for each item in item master.
4	Apply	Apply changes.

### 9.5 Payment Mode Configuration

User can configure Key Id & Secret Key for enabling the ability to make payments through Razor Pay. To generate Key Id & Secret Key, user needs to register on Razor Pay website. To register [Click Here](#) or visit <https://razorpay.com/>

Similarly user can configure required credentials for AEPS also. User need to send mail to [enquiry@wepdigital.com](mailto:enquiry@wepdigital.com)

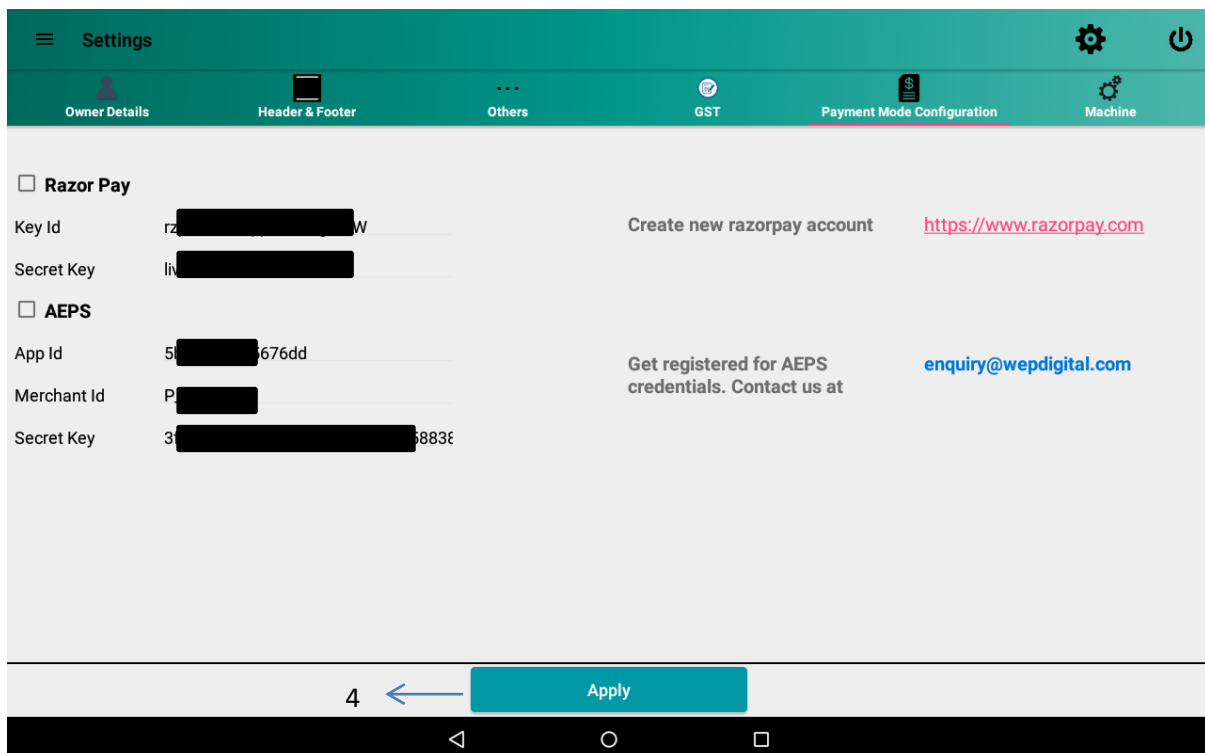


Figure 77: Payment Mode Configuration



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## 9.6 Machine

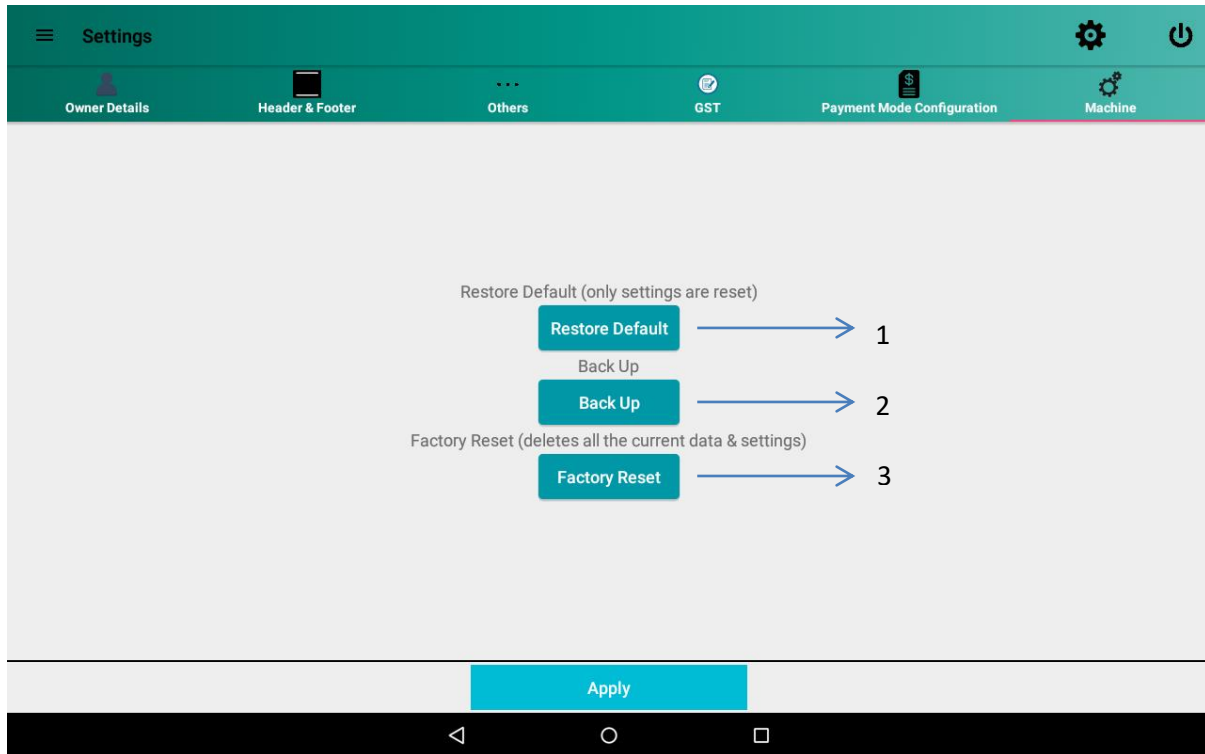


Figure 78: Machine setting

Label	Field	Description
1	Restore Default	This option will restore all default settings in the system.
2	Back up	User can take a backup of the database and can create as many as backups user wants. Backups will be stored in device's internal memory under "WeP_Retail_Backup" directory.
3	Factory Reset	Factory reset will erase everything and application will come in its initial stage as it was installed for first time.



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## **10. Limitations & Recommendations**

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1. Item search through barcode is recommended to be done through barcode scanner.
2. Payment like eWallet, MSwipe requires good internet connectivity.
3. Last transaction amount shown for each customer in customer module is with respect to petty cash.
4. Shortcode accepts not more than 10 digits.





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## 11. FAQs

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**Q. Is any configuration required for barcode before using?**

A. Yes, kindly configure your barcode scanner to return line feed after scanning.

**Q. Upon using clicking MSwipe Payment, I am being asked for username and password. Where do I get these?**

A. You will be provided with username and password at the time of purchase of MSwipe Machine.

**Q. On clicking Wallet Payment, I am getting message “Invalid credentials”**

A. You have to go to RazorPay website and get register. Upon successful registration, you will be provided with Key Id. Go to payment mode configuration and enter this Key Id and save it. Now you will be able to use Wallet Payment.

**Q. After scanning barcode of an item, it is not added into order list.**

A. User needs to configure their barcode scanner to add line feed suffix, only then you will be able to add item in order list directly after scanning item’s barcode. [See Details](#) in section 4.1.1.

**Q List of documents required for registering with MSwipe**

- A. 1. MSwipe OnBoard Document  
2. MSwipe Application Form

**Individual Account**

- PAN Card of individual
- Address Proof of the individual
- Cancelled cheque
- Rental Agreement of the shop / business

**Proprietorship**

- PAN Card of Proprietor
- Shop Establishment / VAT Certificate (Proof of Business)



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- Address Proof of the Shop / Business (Rental Agreement)
- Cancelled cheque

**Q. How to get AEPS credentials**

**A.** User can mail at [enquiry@wepdigital.com](mailto:enquiry@wepdigital.com) . Wep Digital will contact back to the user for the related documents and process.

**Q. Is there any helpline no for customers**

**A.** Give us a call on our toll free number: 1800 425 4453  
Or you can drop us a mail on our email id: enquiry@wepdigital.com  
For more information visit us at: [www.wepdigital.com](http://www.wepdigital.com)