T3techno

CloudERP

User Guide

Cloud ERP for products, inventory, purchase, sales, GST invoicing and multi-channel commerce.

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Need help? Use the Help (?) button on any screen or contact support from the website.

Getting started

Set up your organization in 6 steps and start selling the same day.

1. Sign up on the website (Start free trial) or ask your administrator to create your organization.
2. Open Organization Settings and fill company name, GSTIN, address, state and invoice details.
3. Countries & Tax: click 'Quick setup: India GST' to create GST 0/5/12/18/28% rules automatically.
4. Warehouses: check the default warehouse, add more if you have godowns or showrooms.
5. Products: add products by hand or import them from Excel (Products › Import).
6. Stock: enter opening stock with Stock › Stock in. You are ready to create purchase and sales orders.

Tips

- The menu only shows modules included in your plan; locked items say 'Upgrade to unlock'.
- Use the Help (?) button on any screen to open the guide for that screen.

Products, variants and images

Create products with SKU, HSN, prices, images, attributes and size/colour variants.

1. Products › New product. Fill name, SKU (unique), category, brand, unit, HSN/SAC and tax class.
2. Enter prices: cost, MRP, selling, wholesale/dealer. Save.
3. On the product page upload images (drag & drop). Set one as main, drag to reorder.
4. Variants: add size/colour/material values and click Generate variants - each gets its own SKU, barcode, price and stock.
5. Attributes & specifications: add any extra fields (material, knot count, origin …).
6. Bulk: Products › Import to upload an Excel/CSV; Export to download all products.

Tips

- Archive hides a product without deleting its history.
- Images are checked and resized automatically; large files are refused.

Categories and brands

Organise products in a category tree and by brand.

1. Categories › New: give a name, choose a parent for sub-categories, add SEO text if needed.
2. Brands › New: add brand name and logo.
3. Pick the category and brand on each product form.

Tips

- A category that has products cannot be deleted - move the products first.

Price management

Special prices by channel, country, quantity and date, plus bulk price updates.

1. Open a product › Prices to add a special price: channel (website, marketplace, showroom), country/currency, minimum quantity, valid from/to.
2. Price Management › Bulk update: choose category or brand, enter % increase/decrease, preview, apply.
3. Every change is kept in price history with the reason.

> **Tips**
>
> - The best matching special price is used automatically on sales orders.

Stock, batches and alerts

Stock in/out, damage, stock count and transfers with FIFO/FEFO batches and expiry.

1. Stock › Stock in: opening stock or goods received - choose product, warehouse, quantity, cost; add batch/lot and expiry if used.
2. Stock out: issue goods - batches are used FIFO/FEFO automatically, expired batches are never issued.
3. Mark damaged moves quantity out of sellable stock.
4. Stock count: enter the physical count - the difference is posted as an adjustment.
5. Transfer: move stock between warehouses (batch, expiry and cost move too).
6. Stock Ledger shows every movement; Batches & Expiry and Alerts show low stock and items expiring soon.

Tips

- Set reorder level per product and warehouse on the Stock page to get low-stock alerts.
- Sales orders reserve stock; available = on hand - reserved.

Warehouses and locations

Godowns, branches and showrooms with racks and bins.

1. Warehouses › New: code, name, address, manager. Mark one as default.
2. Open a warehouse to add locations (rack / shelf / bin).
3. Choose the warehouse on every stock movement, purchase receipt and sales order.

Tips

- The number of warehouses depends on your plan.

Vendors (suppliers)

Supplier details, products they supply and their ledger.

1. Vendors › New: name, GSTIN, contact, address, payment terms, bank details.
2. Link products with vendor price and lead time.
3. Vendor ledger shows purchase invoices, payments, debit notes and balance.

Tips

- Bank account numbers are stored encrypted.

Purchase: order → receipt → invoice

Buy from vendors with approval, goods receipt, purchase invoice and returns.

1. Purchase Orders › New: choose vendor and warehouse, add product lines (quantity, rate, tax is calculated).
2. Submit and Approve (users with the Approve permission).
3. Receive: enter received and rejected quantity, batch and expiry → a Goods Receipt (GRN) is created and stock goes up.
4. Create the purchase invoice from the GRN; record the vendor payment in Payments.
5. Return to vendor creates a debit note and reduces stock.

Tips

- You can receive an order in parts; it closes when everything is received or you close it.

Customers

Customer master with GSTIN, addresses, credit limit and ledger.

1. Customers › New: name, company, GSTIN, billing/shipping address, state (decides CGST+SGST or IGST).
2. Set price type (retail/wholesale/dealer), credit limit and payment days.
3. Open a customer to see orders, invoices, receipts and outstanding balance.

Tips

- Orders above the credit limit are stopped at confirmation.

Sales orders and shipping

Order → confirm (reserve stock) → invoice → ship → deliver, plus returns.

1. Sales Orders › New: customer, warehouse, product lines; price and GST fill in automatically.
2. Confirm: checks credit limit and reserves stock.
3. Create invoice: a GST tax invoice is made and stock is reduced.
4. Ship: courier and tracking number; update status to Delivered.
5. Return: choose items, a credit note is created and stock comes back.

Tips

- Cancel a confirmed order to release its reserved stock.

Invoices and GST print

Tax invoices, credit and debit notes with HSN summary, ready to print or save as PDF.

1. Invoices lists sales and purchase invoices and notes; filter by type, date, status.
2. Open an invoice › Print for the A4 GST format (CGST/SGST or IGST, place of supply, amount in words).
3. Use the browser's Save as PDF to email it.

Tips

- Numbers follow the financial year, e.g. INV/2627/00001.

Payments and receipts

Record money received from customers and paid to vendors.

1. Payments › New: choose customer receipt or vendor payment.
2. Pick the party, amount, mode (cash, bank, UPI, cheque) and reference.
3. Allocate the amount against open invoices; the ledger updates automatically.

Countries and tax

GST (or VAT / sales tax) classes, rules and registrations.

1. Countries & Tax › Quick setup: India GST creates tax classes and intra-state/inter-state rules.
2. Add your GST registration (GSTIN and state).
3. Tax calculator: test any amount, class and state pair before invoicing.

Users, roles and permissions

Give each team member their own login with only the access they need.

1. Roles › New role: tick permissions (view/manage products, inventory, purchase approve …).
2. Users › New user: name, email, password, choose roles.
3. Deactivate a user to block login immediately.

Tips

- Every change is recorded in the Audit Log.

Organization settings and subscription

Company profile, invoice details, plan and usage.

1. Organization Settings: company details, logo, GSTIN, invoice terms, currency and time zone.
2. Subscription: current plan, expiry, usage (users, products, orders this month) and modules in each plan.
3. Audit Log: who changed what and when.

Super Admin: organizations

Create and manage customer organizations.

1. Organizations › New organization: company, admin user email and password, plan.
2. Open panel to work inside an organization; Exit organization to return.
3. Suspend / activate an organization; Download data backup gives that organization's data.

Super Admin: plans and subscriptions

Prices, limits and modules of each plan; renew or change subscriptions.

1. Subscription Plans › Edit: monthly/yearly price, trial days, users, products, warehouses, orders per month.
2. Tick the modules included in the plan - menus and features follow automatically.
3. Subscriptions: extend, change plan or cancel for any organization.

Super Admin: website, support and SEO

Edit public website pages, answer support tickets and manage SEO.

1. Website content: brand, tagline, contacts, About / Terms / Privacy / Refund / FAQ text.
2. Support tickets: messages from the Contact page - change status, notes, reply by email.
3. SEO & Sitemap: meta title, description, canonical URL per page; Site URL, Google verification, Analytics; sitemap.xml and robots.txt are automatic.

Super Admin: backups and restore

Automatic backups, FTP / Zata.ai copies and restore into MySQL or SQL Server.

1. Backups › Settings: every N days (default 7), how many to keep, folder; FTP and Zata.ai details with Test buttons.
2. Full backup now any time; Backup one organization for a single customer.
3. Download any backup; ↻ Restore into this database or another MySQL / SQL Server database (type RESTORE).
4. Upload a backup zip (from FTP / Zata.ai / your PC) and restore it.

Tips

- Keep the safety backup option on when restoring over live data.

Super Admin: database and SQL console

Run on MySQL or SQL Server and work directly with tables.

1. Database: see both connections, Test, and Copy & switch to the other database (type SWITCH).
2. SQL console: unlock with your password, browse any table, edit / insert / delete rows.
3. SQL tab: run queries (read-only by default; tick Allow changes to update). Export results to CSV.
4. Every change is saved in the Audit Log.

Tips

- Take a full backup before big changes - SQL changes cannot be undone.

REST API

Connect your website, Shopify app or other systems.

1. Open /swagger to see all endpoints.
2. Get a token: POST /api/v1/auth/token with an organization user's email and password.
3. Call products and inventory endpoints with Authorization: Bearer <token>. Stock moves are idempotent.

Tips

- The API module and daily request limit depend on the plan.

Invoice designs & item tags (barcode / QR)

Choose how invoices look and design product tags with barcode and QR code by drag and drop.

1. Open Design & print › Invoice & tag designs. Ready designs are created the first time.
2. Invoice design: click Edit or New invoice template (classic, modern, compact, minimal, thermal 80 mm). Set colour, font, paper, columns, bank details, UPI id for a 'Scan to pay' QR, terms and signature. Save & preview shows your latest invoice.
3. Make one design Default - it is used for Print / PDF. On an invoice, the arrow next to Print lets you pick another design.
4. Item tag: click Design (or New item tag and pick a size). Add Text, Barcode, QR code, Image, Box or Line from the left and drag them on the label; drag the blue corner to resize.
5. Click a product detail on the left (name, SKU, MRP, price, size, colour ...) to place it; inside a text it becomes {{token}} and is filled for every product.
6. Set Across / Down for A4 label sheets (e.g. 3 x 8) or keep 0 for a thermal label printer. Save design.
7. Print item tags: search or scan products, set the number of labels (or Qty = stock) and click Print / Save as PDF. Product page › Print tag opens it for one product.

Tips

- Barcode type CODE128 works with any SKU; EAN13 needs a valid 13-digit number.
- Use Test print in the designer to check alignment on your printer before printing many labels.
- In the browser print window set Margins = None and Scale = 100%.

Presentations (PowerPoint & PDF)

Make slides from ready layouts and your products, then present, download PowerPoint (.pptx) or save as PDF.

1. Open Design & print › Presentations › New presentation. Pick shape (16:9 or 4:3), theme and a start: blank, company profile, product catalogue or monthly business report.
2. Left: slides - add, copy, move up / down, delete. Centre: the slide - drag items to move them, drag the blue corner to resize.
3. Right: Slide layout changes the whole slide (title, points, two columns, image left / right, section, quote, numbers, contact). Set background colour or image.
4. Toolbar: add heading, text, bullets, image (upload or link), box, line, QR or barcode. Product slides adds one slide per product or 4 per slide with image, price and QR.
5. Numbers slides use live values like {{salesMonth}}, {{products}}, {{stockValue}} - they are filled in when you present or export.
6. Save (Ctrl+S, also saves itself every 20 seconds). Present opens full screen (arrow keys, F). PPT downloads a PowerPoint file, PDF opens the print window - choose Save as PDF.

Tips

- Theme changes colours of new items; 'Apply theme colours to all slides' re-colours existing slides.
- Speaker notes under the slide go into the PowerPoint file.
- Use images under 1.5 MB to keep the file small.

Shopify connection

Send products, prices and stock to your Shopify store and bring Shopify orders in as sales orders.

1. In Shopify admin: Settings › Apps and sales channels › Develop apps › Create an app. Admin API scopes: read/write products, read/write inventory, read locations, read orders. Install the app and copy the Admin API access token (shpat_…).
2. In CloudERP open Integrations › Shopify. Enter the store address (name.myshopify.com) and the token, choose the warehouse whose stock goes to Shopify, and Save & test connection.
3. Tick what to sync: products, prices (MRP becomes compare-at price), stock, orders. Tick Automatic sync to run every 15 minutes.
4. Already selling on Shopify? Click Import products from Shopify - products with the same SKU are linked, the rest are created in CloudERP.
5. Sync now sends changed products and stock and imports new orders. Imported orders appear in Sales Orders with channel Shopify; customers are created automatically.
6. Full product sync sends every product again (use after big price changes).

Tips

- Products are matched by SKU - keep SKUs the same on both sides.
- Product images are sent only when the app has a public https address (not localhost).
- The menu item appears when your plan includes Integrations; the platform administrator can switch Shopify off for everyone.

Integrations (Super Admin)

Switch Shopify on or off for the whole platform and watch every organization's store sync.

1. Open Super Admin › Integrations (Shopify).
2. 'Switch off for all' stops every Shopify sync at once; 'Switch on for all' allows it again.
3. The table shows each organization's store, linked products, last sync time and result.
4. Use the sync button to run one organization's sync now, or pause / resume its connection.
5. To give an organization Shopify, add the Integrations module to its subscription plan (Super Admin › Subscription Plans).

Tips

- Access tokens are stored encrypted and are never shown in Super Admin.