

# Shop Ledger — User Guide

POS & Inventory Management — Quick start after login

## Who this guide is for

Shop owners and staff using Shop Ledger after your account is active.

## Suggested order

Set up master data (brands, categories, products, sellers), record purchases, then sell from POS. Track money daily with Expenses and Day Close.

### 1. Sign in

Open your Shop Ledger URL, enter your email and password. You land on the **Dashboard** with shortcuts and a summary of your shop.

## 2. Master data — Brands & Categories

Before products, define how you group inventory:

1. Open **Brands** from the sidebar. Add each brand name you sell (e.g. Samsung, Local).
2. Open **Categories**. Add product types (e.g. Mobile Phones, Accessories).

Tip: Keep names short and consistent — they appear on bills and reports.

## 3. Products

1. Go to **Products** → add a product.
2. Enter **name**, optional **model**, select **Brand** and **Category**, **purchase price** (cost), **selling price**, and opening **quantity**.  
Optional: IMEI, description, minimum stock alert level.
3. A **barcode** can be generated automatically when you save (you can scan it at POS).
4. Save. Repeat for each item you keep in stock.

**Stock from purchases:** Recording a **Purchase Bill** increases stock for each line. You can also create a **brand-new product** on a purchase line (see section 5) if you prefer to enter stock straight from the supplier bill.

## 4. Sellers (suppliers / vendors)

1. Open **Sellers** in the sidebar.
2. Add each supplier you buy from (name, phone, address as needed).
3. When you create a **Purchase Bill**, you will pick the seller so your buying history stays organized.

## 5. Purchase Bills (stock inward)

1. Open **Purchase Bills**.
2. Create a new bill: choose the **seller**, **purchase date**, and optional tax/discount/notes.
3. **Each line:** either pick an **existing product** (quantity + purchase rate per unit), or enter a **new product name** on the line with category/brand (or defaults), purchase rate, and selling price — the app creates the product and adds the purchased quantity to stock when you save.
4. Enter **paid amount** if you pay cash/part now; unpaid balance is tracked against the seller.
5. Save the bill. **Inventory increases** for every line; the product's latest purchase cost is updated from the line rate.

This is the main way to reflect **investment in inventory**: money spent buying goods that become stock. Use **Expenses** separately for rent, bills, and other costs that are not stock purchases.

## 6. POS (Point of Sale)

1. Open **POS** from the sidebar.
2. Search or scan products, add to cart, set quantities.
3. Apply discounts if needed, choose customer (or walk-in), and payment method (cash, card, JazzCash, Easypaisa, etc.).
4. Complete the sale — stock reduces automatically for sold items.
5. You can print or share a receipt / invoice from the sale screen.

**Related:** **Sales List** shows past sales with filters. **Customer Khata** tracks credit sales and balances for named customers.

## 7. Daily shop money & investments

### Expenses

Use **Expenses** to record daily spending (rent, utilities, salaries, transport, etc.) by category. This keeps operating costs separate from purchase stock costs.

### Day Close (cash register)

**Day Close** helps you reconcile cash at end of day: opening cash + cash sales + cash received – cash expenses – refunds = expected cash. Enter the cash you counted and note any difference.

### Reports

**Reports** summarises sales, purchases, and includes profit-oriented views (including cost of goods and expenses where configured). Use the date range to review a week or month.

## 8. Other useful modules

- **Stock Check** — physical count vs system quantity.
- **Loans (by bill)** — track money lent or borrowed against bills where you use this feature.
- **Users / Roles** — (owner) invite staff and control who can access POS, products, purchases, etc.
- **Subscription** — (owner) view plan limits and upgrade.
- **Profile** — change your account email/password; shop owner can update shop address and phone shown on receipts.

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Shop Ledger — User Guide. Screens and exact labels may vary slightly by plan and permissions.

Download this guide anytime (no login): <https://app.shopledgerapp.com/user-manual>

Slide walkthrough to screen-record as a short video (no login): <https://app.shopledgerapp.com/video-guide>

For support, contact your shop administrator or Shop Ledger support.