



eCashBooks

QUICK START GUIDE

This is the quickest way to get up and going in minutes.

Once you've signed up successfully, make sure you record your **Username** and **Password** somewhere safe.

Your Username and Password is the **SAME** for the **eCashbooks online site** and the **eCashbooks mobile app**.



STEP 1

DOWNLOAD THE APP



If you haven't already done so, download the eCashbooks Mobile app.

Scan this QR code or go to the Apple App Store or Google Play Store



OUR APP

STEP 2

ENTER YOUR BUSINESS DETAILS

Complete the details about your business. Enter the information as required and you can use the TAB key to move around.

Now for the Tax (GST, VAT) information. can change the Tax "name" and Tax "rate" to suit your region. Just click and change.

Time to add your logo (if you have one). Your logo will appear on your invoices and quotes
You can change it at any time.



Edit your details here			
Name	Business Number(if applicable)		
CM Pty, Ltd.	51824753556		
Address	Phone Number		
CM Colony dasdad	221		
	Email		
	m.charudatta@soarika.net		
Suburb/Town	State/Region/Province	Post/Zip Code	
Pune	Maha	2365	
Country	Date Format	Last month in Financial year	First day of week
Australia	dd-month	Jun	Monday
GST, VAT etc. Tax Name		Tax Rate(%)	
GST	CLICK TO EDIT	10.00	
Add Logo for Invoicing and quoting			Upload
Update			

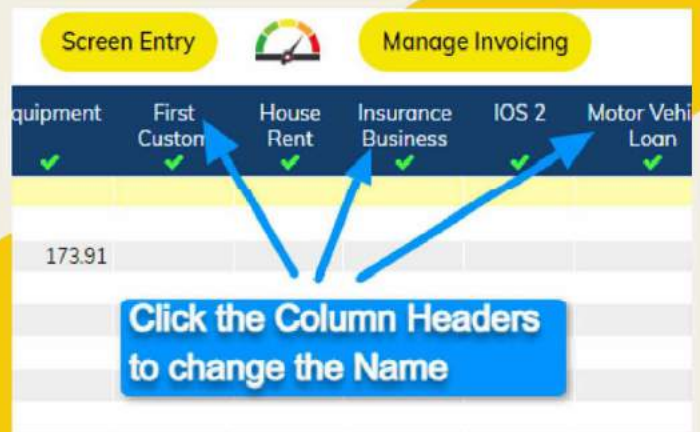
STEP 3

YOUR EXPENSE AND INCOME CATEGORIES OR COLUMN HEADERS.

These are your EXPENSE Categories
 These are your INCOME Categories
 Your system comes with prefilled headers.

Your headers are extremely flexible, simply mouse over the header name and click to change the word that describes the income or Expense

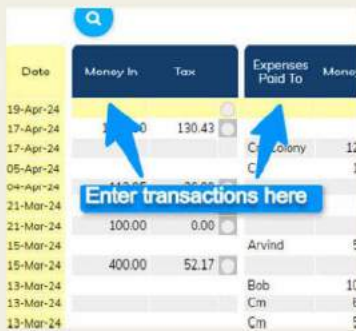
Think carefully when using your columns
 Don't set up a Column header for transactions that you'll use for a couple of transactions in a year.
 The OTHER EXPENSES Column is for infrequent transactions.



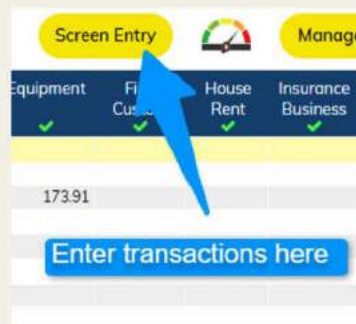
STEP 4

START ENTERING TRANSACTIONS

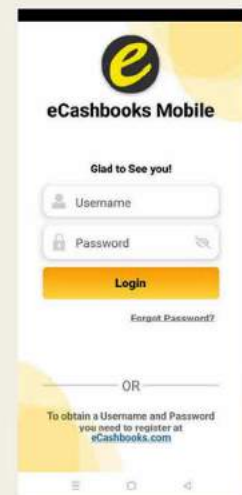
You have three options:



1. Through the Home Screen



2. Through Screen Entry



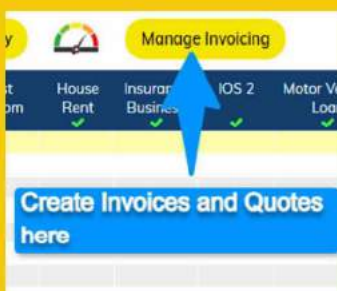
3. Through the App

Start entering, you'll find it easy. Just go from box to box and enter the details.

STEP 5

CREATING INVOICES AND QUOTES

STEP 5



Click the Manage Invoicing button to start



Select Invoice or Quote



You can add your logo and change the colour of your invoice/quote

Choose the type of Invoice you are creating: **ITEM** or **SERVICE**

ITEM is generally used if you are selling things that have a price per item.

SERVICE is where you are selling services and involves a more comprehensive description.

Then look at each box of information required and complete.

That's the end of the Quick Start Guide.

The two most frequent functions; **SCREEN ENTRY** and **MANAGE INVOICING** are found at the top.

Other Menu functions are on the left.

You can try mousing over an **ICON** to get a description of its function.

Over time you'll learn more about other features.

For now head down, bum up and start entering transactions.

If entering transactions put a line through the original document as they are entered, so you won't duplicate.

For more in-depth information, consider using the Help menu button.

