USER MANUAL

Business Portal Guide

Restaurant POS, kitchen display, hotel front desk, housekeeping, billing, inventory, staff, finance and reports, in one place.

Edition: October 2026

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Shared

Introduction

What truePOS is, how this manual is organised, and the terms you will see throughout.

For: Everyone

Welcome to truePOS

truePOS is a single online portal for running a restaurant, a hotel, or both. Your team signs in from any web browser. There is nothing to install, and each person sees only the screens their role allows.

This manual covers the **Business Portal**, where you and your staff do day-to-day work: taking orders, checking guests in, billing, managing stock and staff, and reading reports.

How this manual is organised

Part	Read it if you want to…
Part 1: Product Tour	Get a quick overview of every module: what it does and who uses it. Ideal before you buy.
Part 2: Task Guides	Learn how to do a specific job, step by step (for example, *take a dine-in order* or *check a guest out*).
Appendix	Look up roles and permissions, which modules come with which plan, and answers to common questions.

Every chapter is labelled so you can skip what doesn't apply to you:

Label	Meaning
Restaurant	Restaurant, café, cloud-kitchen and bar operations
Hotel	Hotel, resort and guest-house operations
Shared	Used by every business, whatever its type
Add-on	An optional module. You see it only if your plan includes it

> **Note:** The menu you see in the portal depends on two things: the **modules in your plan**, and the **permissions of your role**. If a screen described here doesn't appear for you, check with your account owner.

Key terms

Term	Meaning
Property	One business location, such as a restaurant outlet or a hotel. One account can hold several properties.
Owner	The person who holds the account. The owner can see everything and decides what other staff can do.
Role	A set of permissions given to staff, for example *Manager*, *Cashier*, *Waiter* or *Receptionist*.
Module	A feature area, such as Orders, Housekeeping or Payroll.
KOT	Kitchen Order Ticket: the ticket that tells the kitchen what to prepare.
KDS	Kitchen Display System: a screen in the kitchen that shows incoming orders in place of printed KOTs.
Folio	A hotel guest's running bill during a stay. Room charges, restaurant charges and payments are all posted to it.
Night Audit	The end-of-day process in a hotel that closes the business day and posts room charges.
City Ledger	Credit accounts for companies (corporate clients) that settle their guests' bills later.
GST	Goods and Services Tax. Bills and invoices calculate CGST/SGST automatically.

Restaurant

Restaurant at a Glance

Menu, tables, reservations, orders, kitchen display, billing, offers and online ordering, from order to payment.

For: Owners, Managers

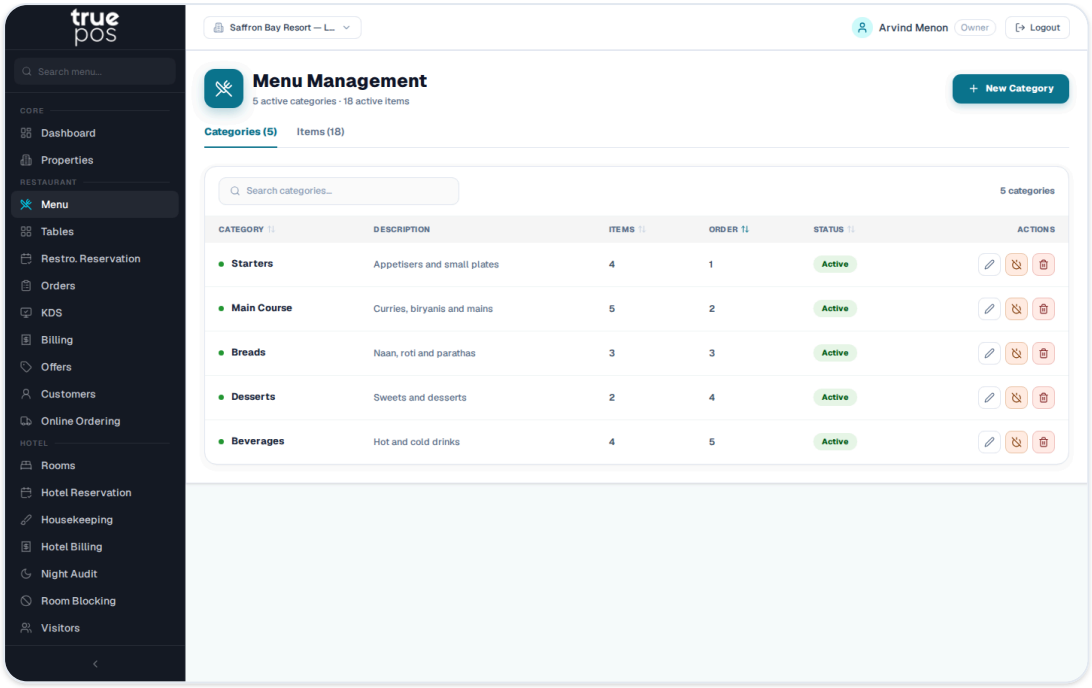
The restaurant day, end to end

A typical order passes through these screens:

Step	Screen	What happens
1	**Restro. Reservation**	A guest books a table, or several tables for a large party.
2	**Tables**	Staff seat the guest. The floor plan shows each table's status at a glance.
3	**Orders**	A waiter takes the order. The Kitchen Order Ticket (KOT) prints automatically.
4	**KDS**	The kitchen sees the order on screen and marks items as prepared.
5	**Billing**	The cashier generates a GST bill, applies any offer, and takes payment. The receipt can be printed or sent on WhatsApp.

Menu

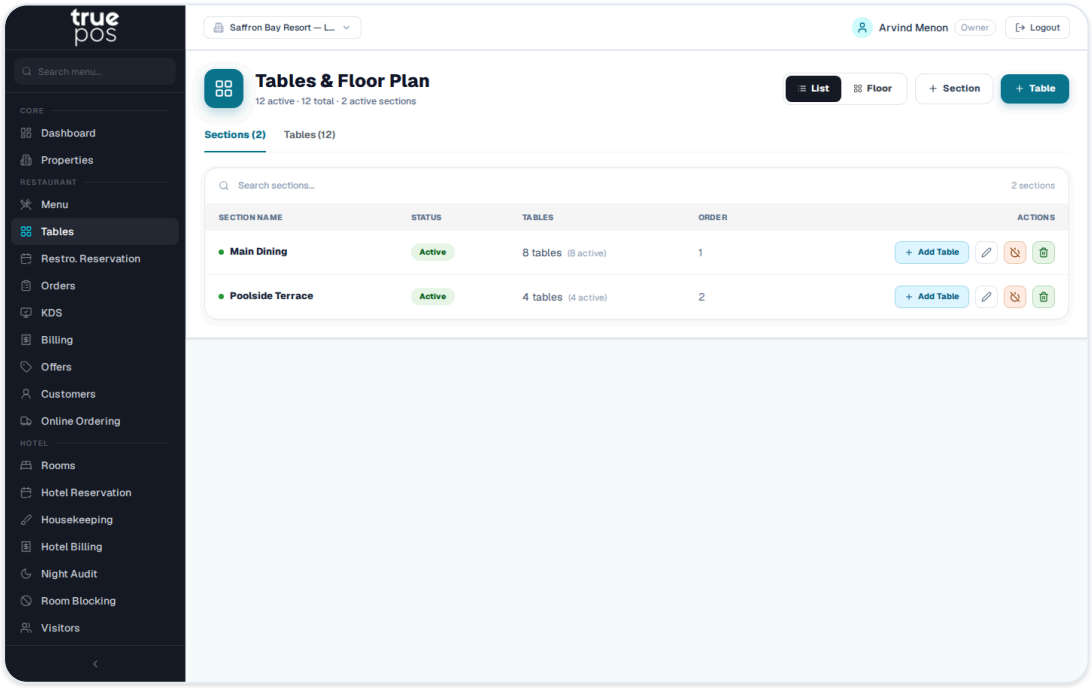
Build your menu as **categories** and **items**, each with a price, tax and availability. When you add many items in a row, the form stays open after each save, so you can enter a whole menu quickly.



Menu management

Tables & floor plan

Set up your floors and tables, then manage service from a live floor plan. Every table shows its status (for example available, occupied or reserved), and staff change it with one click. Each table can have a **QR code**, so guests can scan it and order from their phone.



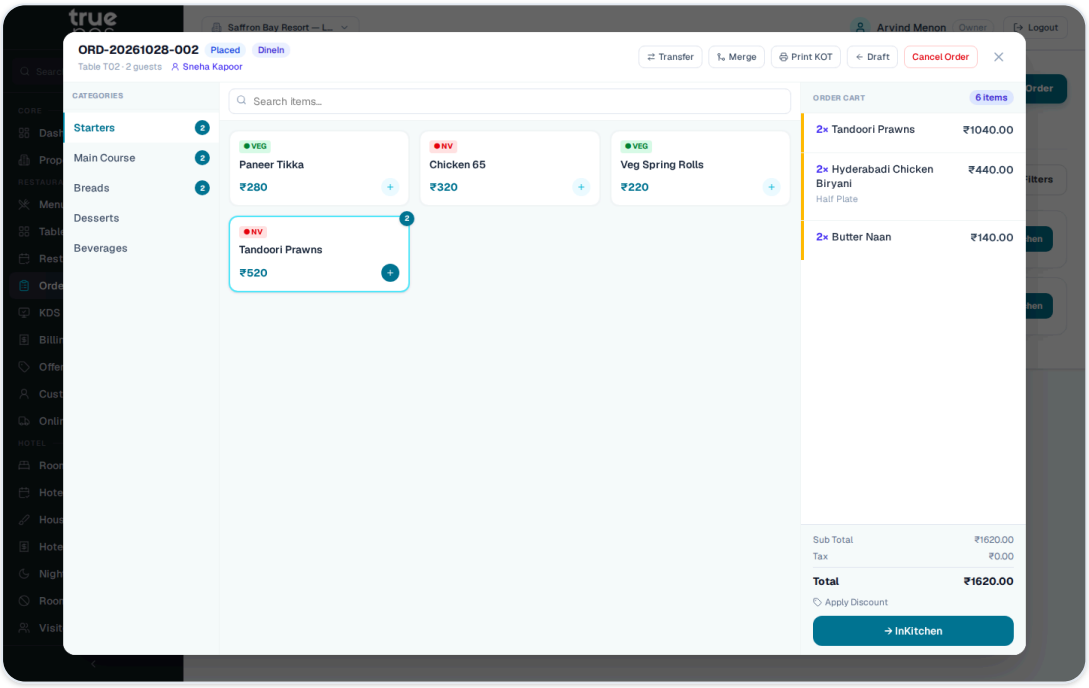
Tables and floor plan

Restaurant reservations

Take bookings for one table or **several tables together** for a large party. You can mark a date as **Fully Booked** to stop new bookings. When the guest's bill is paid, the reservation completes automatically, and cancelling a reservation always asks for a reason.

Orders (POS)

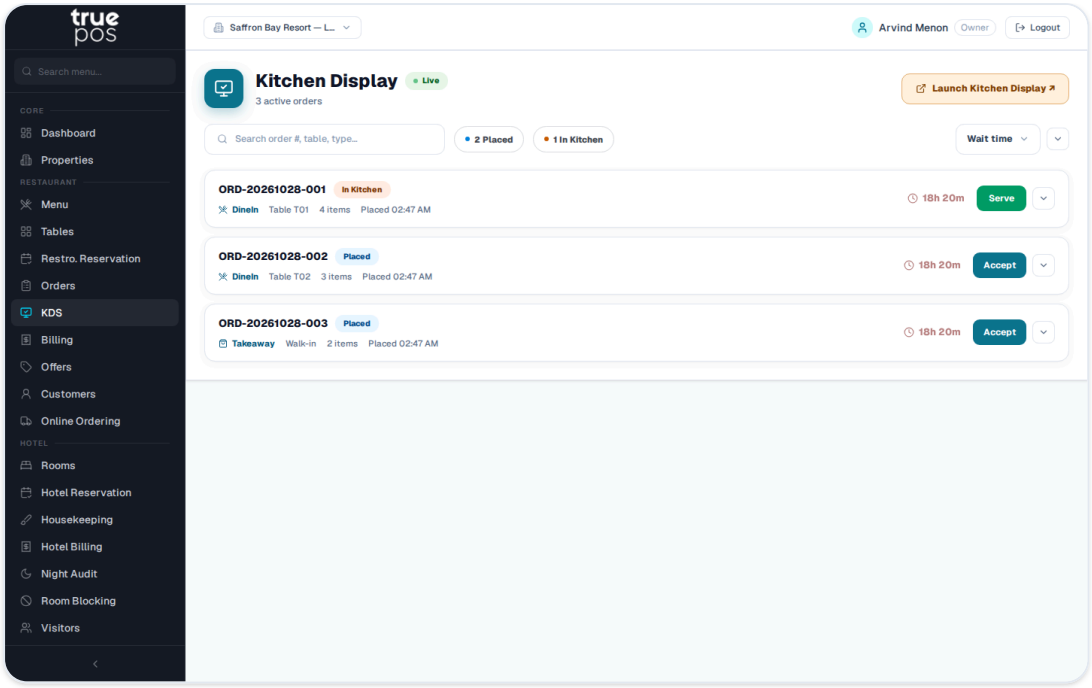
Take **Dine In**, **Takeaway** and **Delivery** orders from a single screen. The form asks for the right details for each type, such as the table and waiter for dine-in, or the delivery address for delivery. A **KOT prints automatically** when the order is placed, and you can reprint it at any time.



Taking an order

Kitchen Display System (KDS) · Add-on

The KDS replaces paper KOTs with a screen in the kitchen. New orders appear in a live queue, an alert sound announces each one, and cooks mark items as they are prepared, so the floor team knows what's ready.



Kitchen display

Billing

Generate **GST-compliant bills** with CGST/SGST calculated automatically. Take payment by cash, card or UPI, and print a receipt or **send the bill to the guest on WhatsApp**. Your logo, receipt layout and printer behaviour are set in Settings.

Offers & coupons

Create **percentage**, **fixed-amount**, **buy-X-get-Y** and **happy-hour** offers. Staff apply them at billing, for restaurant bills and hotel folios alike.

Customers

Every customer's contact details and order history are kept in one place. This record feeds the loyalty tiers in **Customer Insights** and the audiences in **Campaigns**.

Online ordering

Set up connections to food-delivery platforms such as **Zomato** and **Swiggy**, and map your menu items to each platform's item codes. Contact your truePOS partner to activate a platform for your outlet.

Hotel

Hotel at a Glance

Rooms and rates, reservations, front desk, housekeeping, room service, folios, night audit and guest CRM.

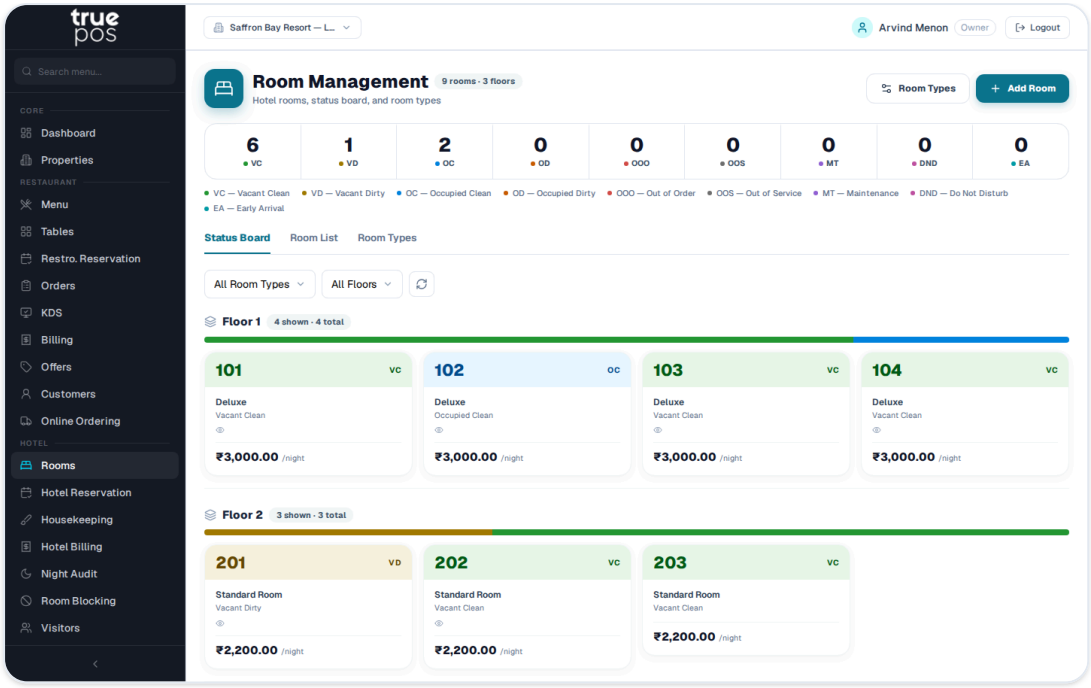
For: Owners, Managers

A guest's stay, end to end

Step	Screen	What happens
1	**Hotel Reservation**	A booking is created with the guest's details, stay dates, room type and rate.
2	**Front desk check-in**	The guest is checked in and assigned a room. Their **folio** (running bill) opens.
3	**Room service**	During the stay, the guest orders food from the in-house restaurant, by phone or by scanning the QR code in the room. Orders can be charged to the room.
4	**Housekeeping**	The housekeeping team cleans and inspects rooms, and their status updates live.
5	**Night Audit**	Each night the business day is closed and room charges are posted to every folio.
6	**Hotel Billing**	At check-out the folio is settled and a GST invoice is printed or sent.

Rooms & rates

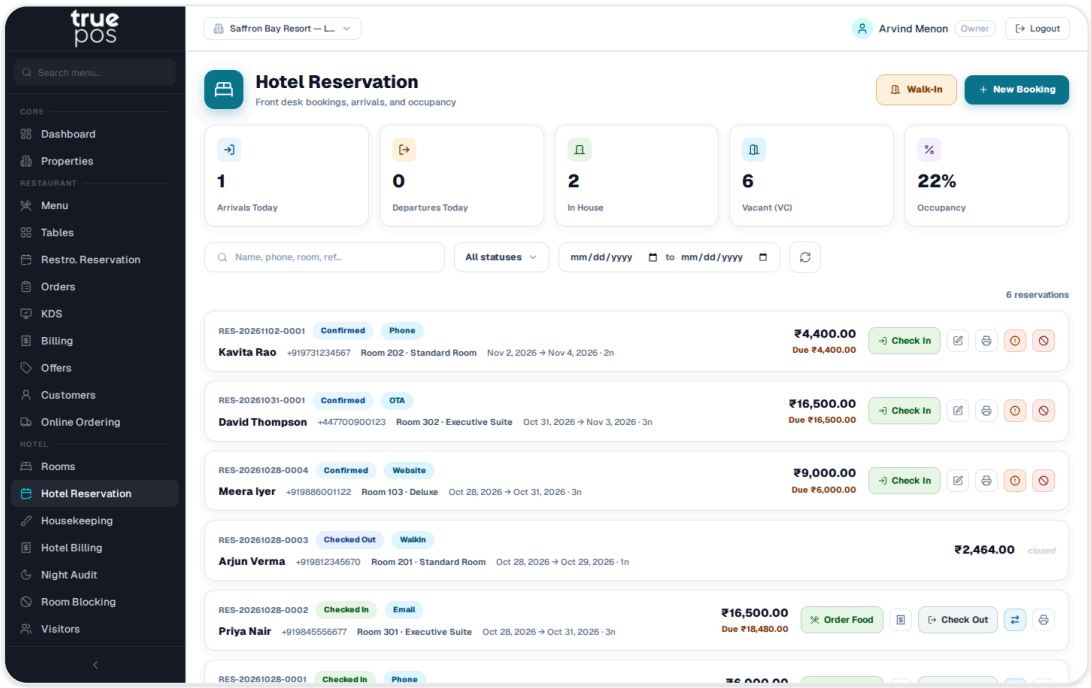
Set up **room types** (for example Deluxe or Suite) with rack rates, occupancy limits and amenities, then add each room. The **rate calendar** lets you change prices for specific dates, such as weekends, festivals or peak season.



Rooms

Hotel reservations & front desk

Create and manage bookings, check guests in and out, and see arrivals and departures. Guest details include age, and if you enter a date of birth the age is calculated for you. **Room Blocking** takes rooms out of sale for maintenance or group holds. The **Visitor Register** logs non-resident visitors for security.



Hotel reservations

Housekeeping · Add-on

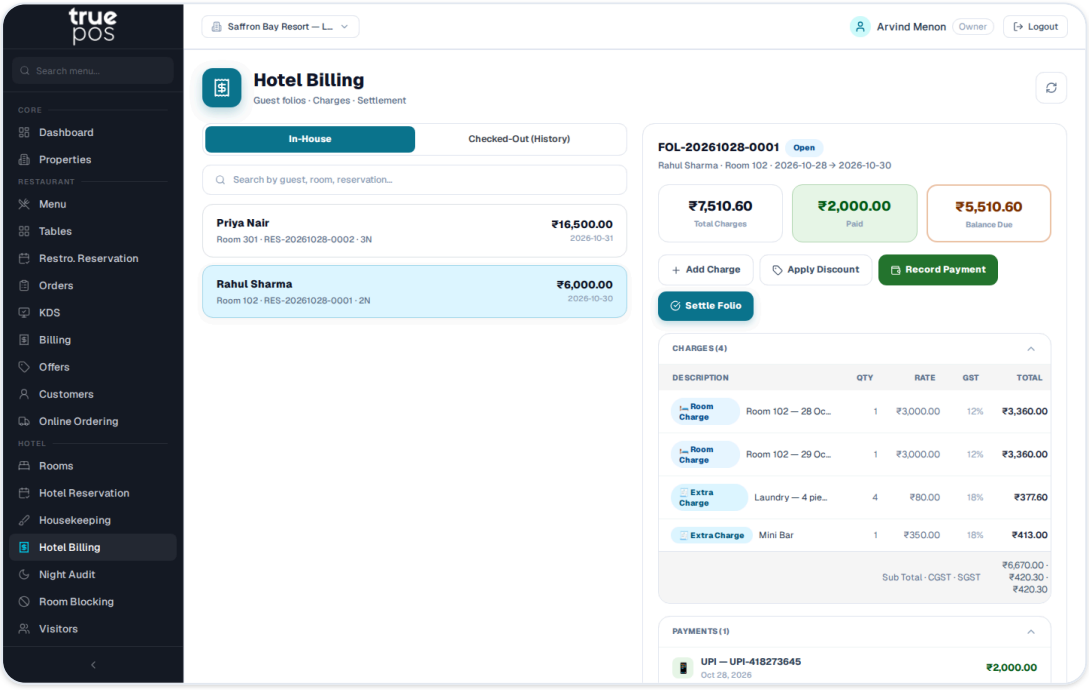
Assign cleaning tasks and log maintenance issues. Each room shows a live status, such as **Vacant Clean**, **Vacant Dirty**, **Occupied Dirty**, **Out of Order** or **Do Not Disturb**, so the front desk knows which rooms are ready to sell.

Room service

Checked-in guests can order from your restaurant. Staff can take the order, or the guest can scan the **room's QR code**. The guest can pay at once, pay on delivery, or **charge it to the room** and settle at check-out.

Hotel billing & folios

Each stay has a **folio** that collects room charges, restaurant and room-service orders, extras and payments. At check-out, settle the folio and issue a GST invoice. You can choose which sections the invoice shows, in what order, and add your own text.



Guest folio

City Ledger (corporate accounts)

Bill companies on credit. Each corporate account can have several contact phone numbers and email addresses, and guests' charges are moved to the company's account for settlement later.

Night Audit

A guided end-of-day process that closes the business day and posts room charges, so every morning starts from accurate figures.

Guest CRM · Add-on

A profile for every guest, with stay history, preferences and spending, so you can personalise each visit and recognise returning guests.

Shared Add-on

Operations & Finance at a Glance

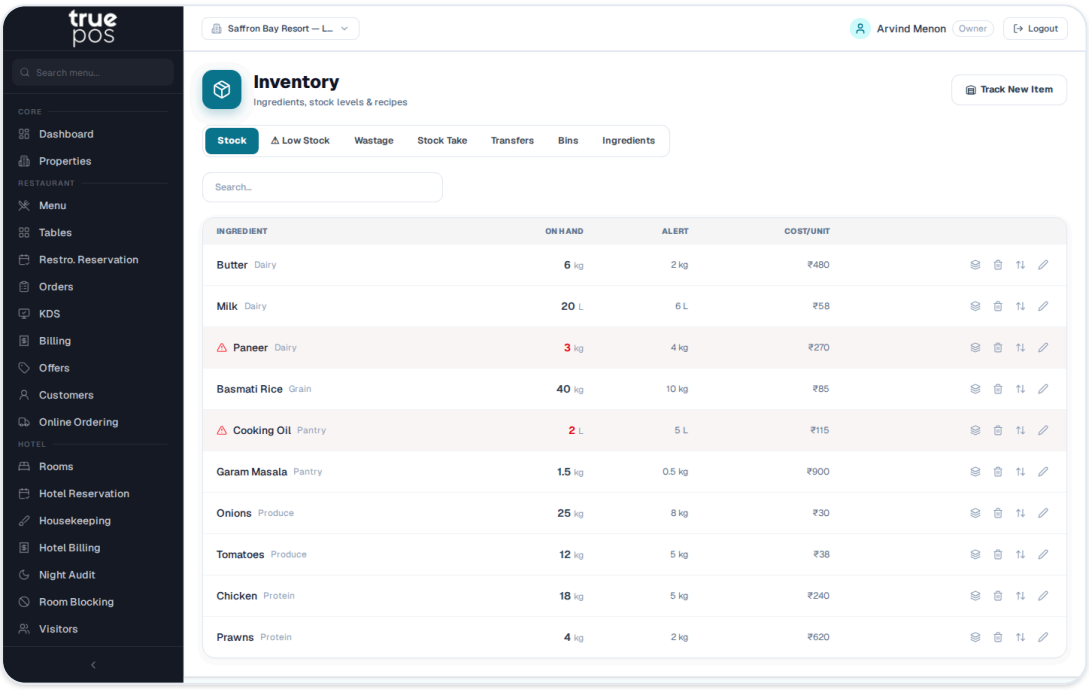
Inventory and purchasing, staff, shifts, attendance and payroll, and full double-entry accounting.

For: Owners, Managers, Accountants

Inventory · Add-on

Track stock levels for every ingredient and supply item, with **reorder alerts** before you run out.

- **Recipes** link menu items to their ingredients.
- **Batch and expiry tracking** helps you use older stock first and reduce waste.
- A **supplier list** and a supplier **payments ledger** show what you owe and what you have paid.



Inventory

Procurement & requisitions · Add-on

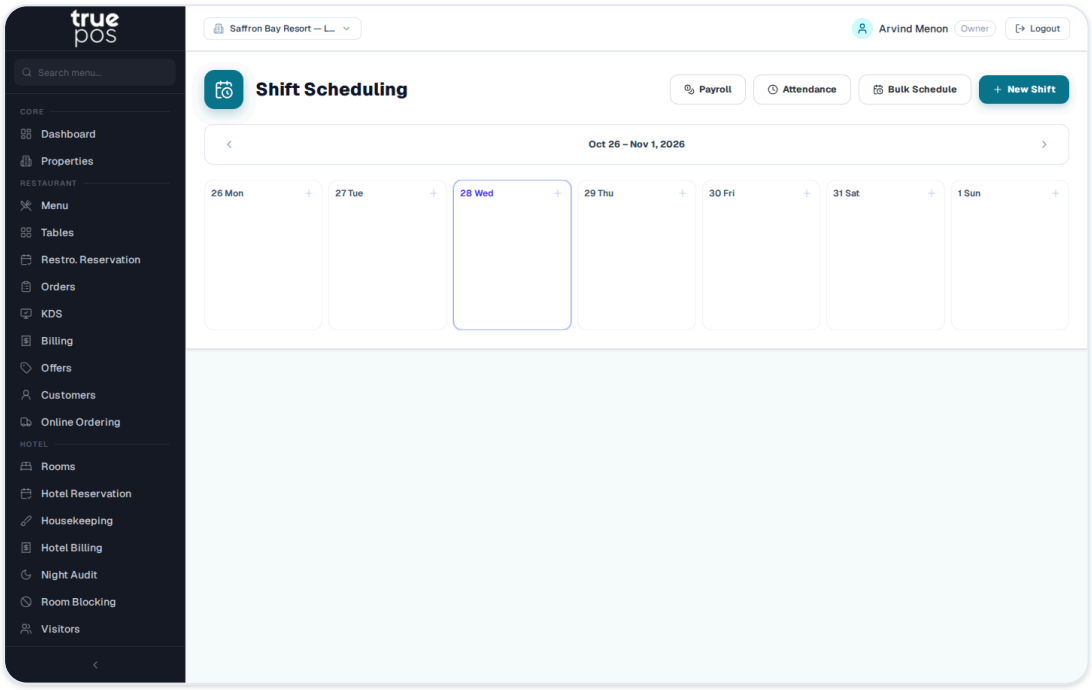
Staff raise **purchase requisitions** for what they need. Managers approve them and turn them into **purchase orders** for suppliers. When the goods arrive, recording the goods receipt updates your stock and average cost automatically.

Staff · Add-on

A directory of every employee, with their details, department and the role that controls what they can do in the portal.

Shifts, attendance & payroll · Add-on

- **Shifts:** plan rosters for one person or create shifts in bulk for a whole team.
- **Attendance:** record who worked when.
- **Leave:** staff apply for leave under **My Leave**, and managers approve it.
- **Payroll:** generate payslips from attendance, including days present, loss-of-pay days and overtime.

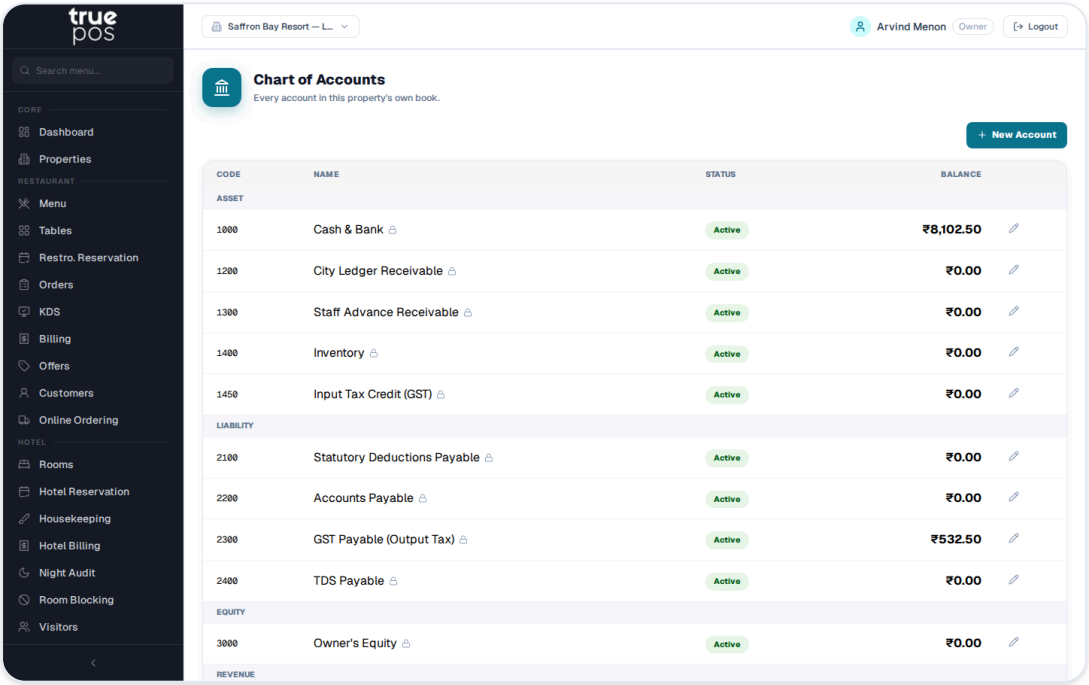


Shift planning

Finance & Accounting · Add-on

Proper **double-entry accounting** for each property, built into the same system that takes your orders and bookings.

Feature	What it gives you
Chart of Accounts	A ready-made list of accounts with standard code ranges, which you can extend
Journal Entries	Record manual entries. Bill payments, hotel folio settlements, goods receipts, supplier payments, payroll, salary advances and expenses are posted to the books for you.
Expenses	Record everyday business expenses
Periods	Open and close accounting periods
Balance Sheet · Income Statement · Cash Flow	The three core financial statements, on demand
GST Return	Figures ready for your GST filing
Import	Bring in opening balances or entries from a spreadsheet
Bank Reconciliation	Match your bank statement against your books



Income statement

Shared Add-on

Reports, Marketing & Administration at a Glance

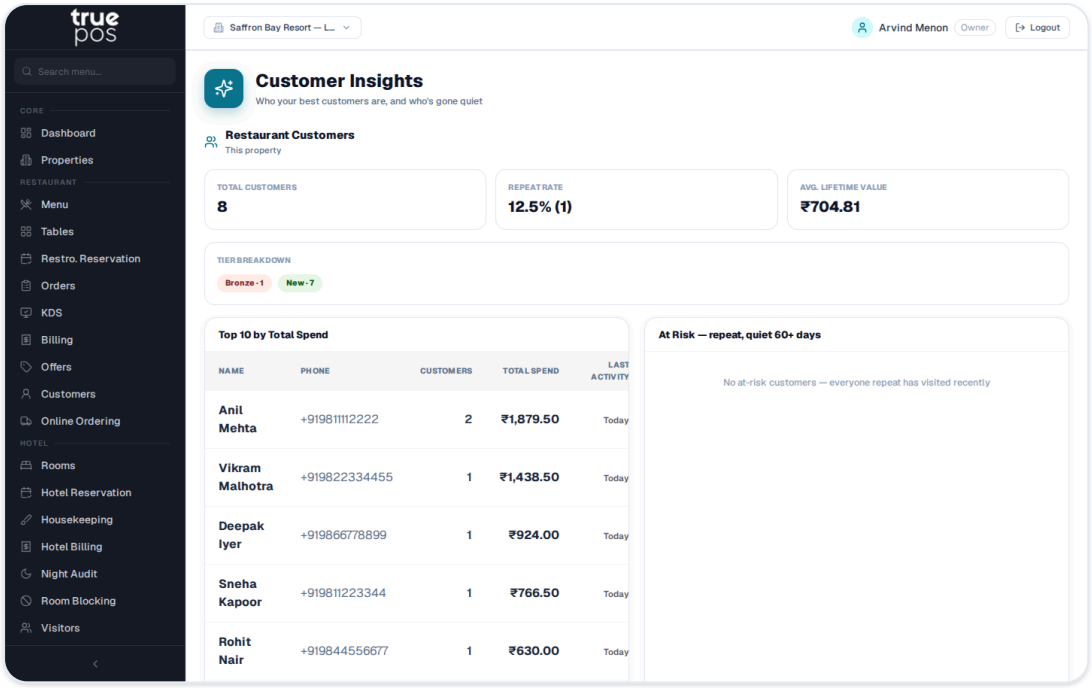
Revenue and occupancy reports, customer insights, promotional campaigns, user roles, settings and the audit log.

For: Owners, Managers

Reports & analytics · Add-on

Report	Answers the question
Revenue Reports	How much did we earn, from which source, and over what period?
Occupancy Reports	How full were our rooms, and on which days?
P&L Report	Is the hotel making a profit?
Food Sales Analytics	Which dishes sell best, and which don't?
Customer Insights	Who are our best customers and guests, how many return, and who hasn't visited in a while?

Customer Insights brings restaurant customers and hotel guests together. It groups them into loyalty **tiers**, and shows the **repeat rate**, **lifetime value**, a list of top customers and a list of those **at risk** of not coming back.



Customer insights

Promotional campaigns · Add-on

Send targeted offers by **SMS, email or WhatsApp**.

1. Choose an audience, for example *Gold-tier customers* or *guests who haven't returned*.
2. Write the message, or pick an approved WhatsApp template.
3. Send yourself a test.
4. Send now, or schedule it for later.

Customers who have opted out of marketing are excluded automatically.

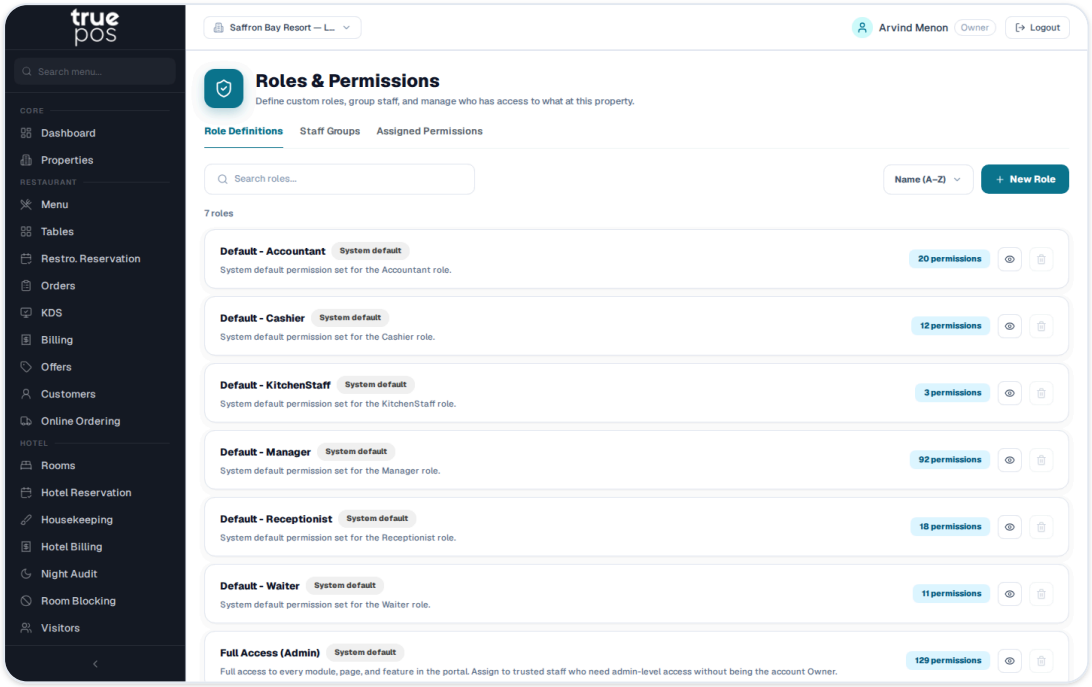
Notifications

Guests and customers can receive automatic messages, such as a **reservation confirmation** or a **reminder before their booking**, by SMS, email or WhatsApp. You choose which messages are switched on and can edit their wording.

Users, roles & security

- **Roles and permissions (RBAC):** use the ready-made roles (**Manager**, **Cashier**, **Waiter**, **Kitchen Staff**, **Receptionist** and **Accountant**, plus a **Full Access** preset), or create your own custom roles and choose exactly what each one can view and change.

- **Assign roles** to staff per property.
- **Audit Log:** a record of who changed what, and when.



Role permissions

Settings

Each property has its own settings for currency and default GST rate, QR self-ordering, payment gateway, receipt and printer layout, invoice layout, notifications and the kitchen display. The account owner also sees which **modules** are active on the plan.

Shared

Getting Started

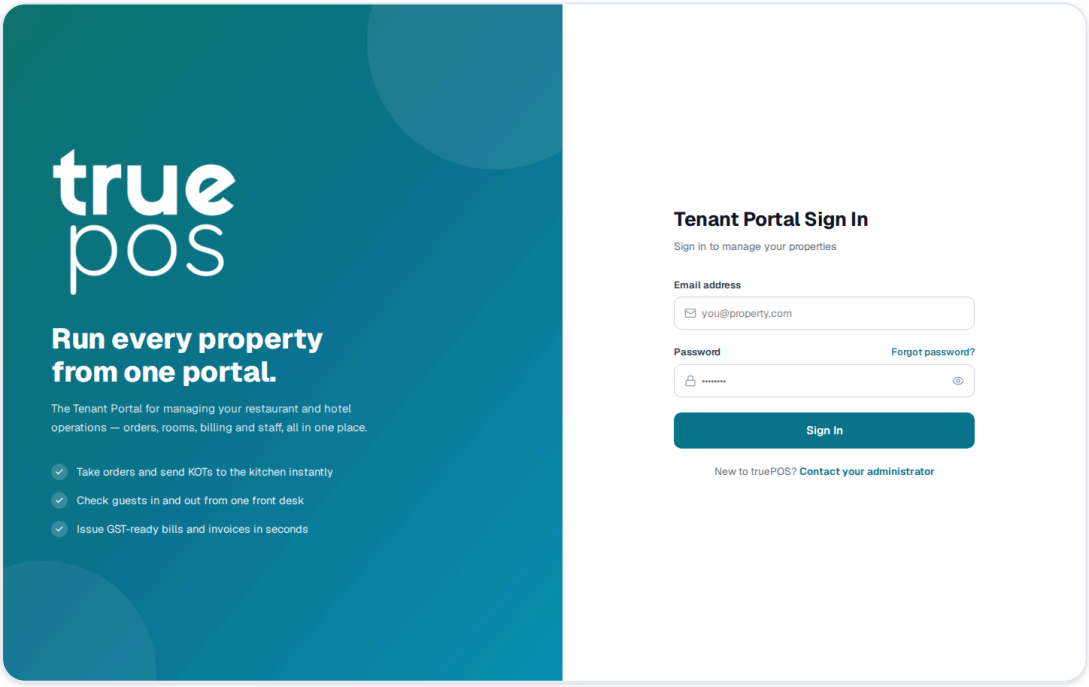
Sign in, find your way around the portal, switch between properties, and reset a forgotten password.

For: Everyone

Signing in

Your account owner creates your login and gives you your email address and password.

1. Open the Business Portal address in any modern web browser (Chrome, Edge, Safari or Firefox).
2. In **Email address**, type your registered email.
3. In **Password**, type your password. Click the eye icon to show or hide what you've typed.
4. Click **Sign In**.



The sign-in screen

> **Tip:** If you see *Invalid email or password*, check for typing mistakes and that Caps Lock is off. After that, use **Forgot password?** (below).

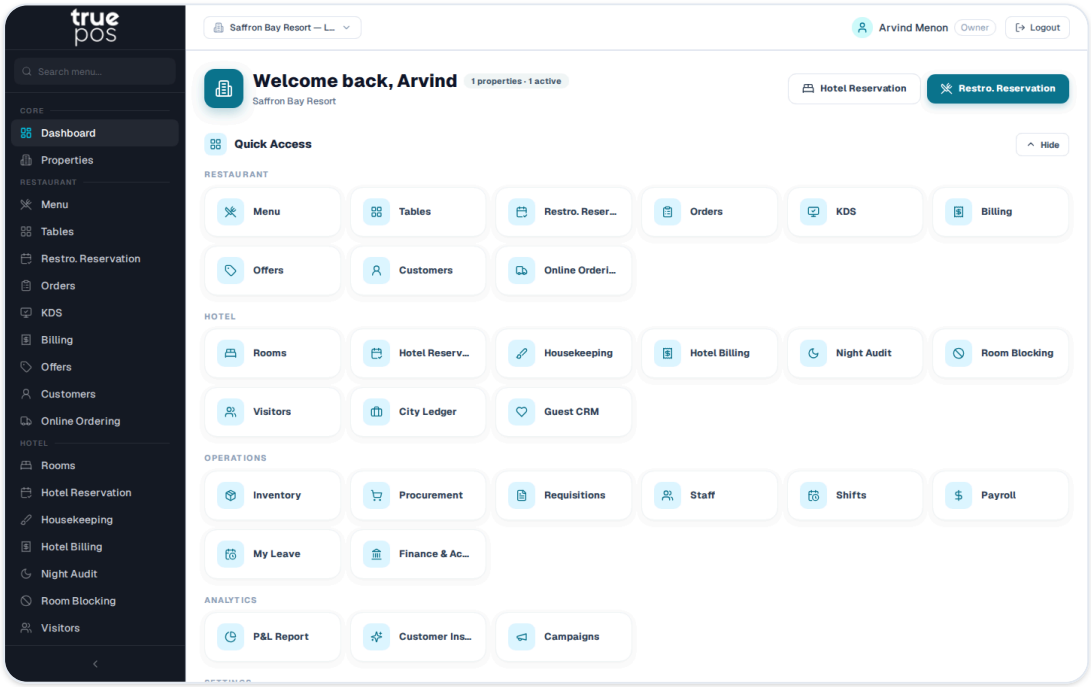
Resetting a forgotten password

1. On the sign-in screen, click **Forgot password?**
2. Enter your email address and click **Send Reset Link**.
3. Open the email and click the reset link.
4. On the **Reset Password** screen, enter your **New password**, then type it again in **Confirm password**.
5. Click **Reset Password**, then sign in with your new password.

> **Note:** A reset link works only once. If you see *This reset link is missing its token*, request a new link.

The dashboard

After you sign in, you land on the dashboard. It greets you by name and shows your business name with a count of your properties (for example *3 properties · 2 active*).



The dashboard

What appears on the dashboard depends on your role:

Section	What it shows	Who sees it
Reservation shortcuts (top right)	One-click buttons to **Hotel Reservation** and **Restro. Reservation**	Staff who can view reservations
Quick Access	Tiles for every screen you can open, grouped by area. Click the arrow to collapse or expand it.	Everyone
Business overview	Combined figures for all your properties: **Revenue**, **Orders**, **Active Now** and **Locations**	Owners and managers with analytics access
Your Properties	A card for each property, with a link to manage them	Owners and staff with settings access

> **Tip:** Waiters, cashiers, kitchen staff and receptionists usually see only the **Quick Access** tiles. That is expected. It keeps their screen focused on their own work.

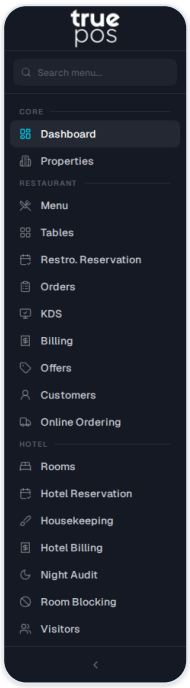
Finding your way around

The left-hand menu

The menu on the left lists every screen you can use, grouped into sections:

Section	Contains
Core	Dashboard and Properties
Restaurant	Menu, Tables, Restro. Reservation, Orders, KDS, Billing, Offers, Customers, Online Ordering
Hotel	Rooms, Hotel Reservation, Housekeeping, Hotel Billing, Night Audit, Room Blocking, Visitors, City Ledger, Guest CRM
Operations	Inventory, Procurement, Requisitions, Staff, Shifts, Payroll, My Leave, Finance & Accounting
Analytics	Occupancy, Revenue, P&L, Food Sales Analytics, Customer Insights, Campaigns
Settings	RBAC (roles and permissions), Settings, Audit Log

- **Search the menu:** type in the **Search menu...** box at the top to filter the list, for example "bill" to find both Billing and Hotel Billing.
- **Collapse the menu:** click the arrow at the bottom of the menu to shrink it to icons only, which gives you more working space.
- **On a phone or tablet:** tap the ☰ button at the top left to open the menu.



The left-hand menu, with the search box at the top

The top bar

Control	What it does
Property switcher (top left)	Chooses which property you are working in. See below.
Your name and role (top right)	Shows who is signed in and their role, for example *Manager*.
Logout	Signs you out. Always log out on a shared counter computer.

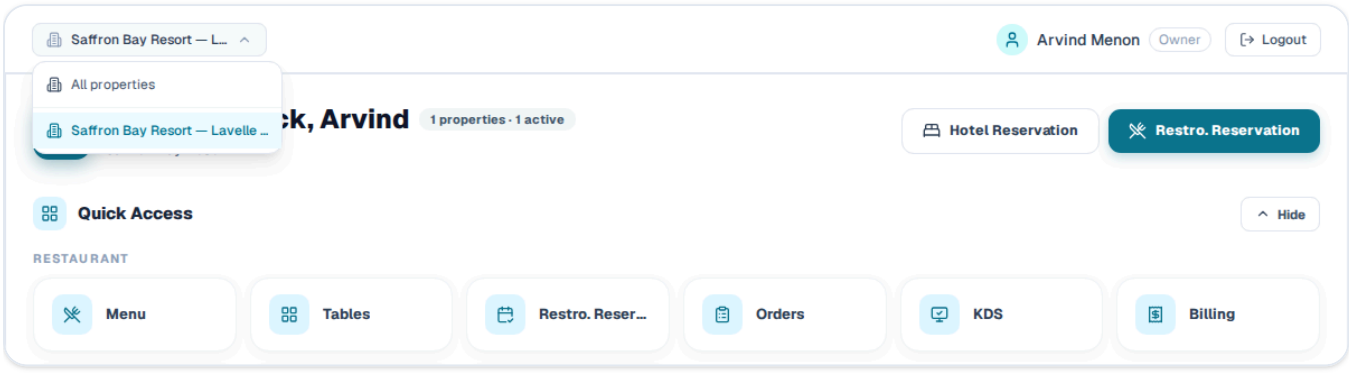
Switching between properties

If your business has more than one property, choose which one you are working in before you take orders or bookings.

1. Click the **property switcher** at the top left. It shows the current property name, or **All properties**.

2. Pick a property from the list.

Choose **All properties** to see combined figures across every location, where a screen supports it.



The property switcher

> **Important:** A property marked **Inactive** has no active subscription, so it can't be selected. Contact your truePOS partner to activate it.

Your profile

Open **Settings** → **Profile** to see your **First Name**, **Last Name**, **Email**, **Organisation** and **Role**.

The **Reporting Currency** card sets the currency used for cross-property reports and the business overview on the dashboard. Amounts from every property are converted into it at the exchange rate on the date of each transaction.

> **Important:** Choose the reporting currency before you start trading. Once financial records exist, it shows *Currency locked — transaction data exists* and can no longer be changed.

Signing out

Click **Logout** at the top right. You'll see *Logged out successfully* and return to the sign-in screen.

Shared

Properties

See every outlet or hotel in your account and keep each one's GSTIN, working hours and contact details up to date.

For: Owners, Managers

What a property is

A **property** is one business location: a restaurant outlet, a café, a cloud kitchen or a hotel. Each property has its own menu, tables, rooms, staff assignments, stock, books of account and settings. Owners can see all of them from one login.

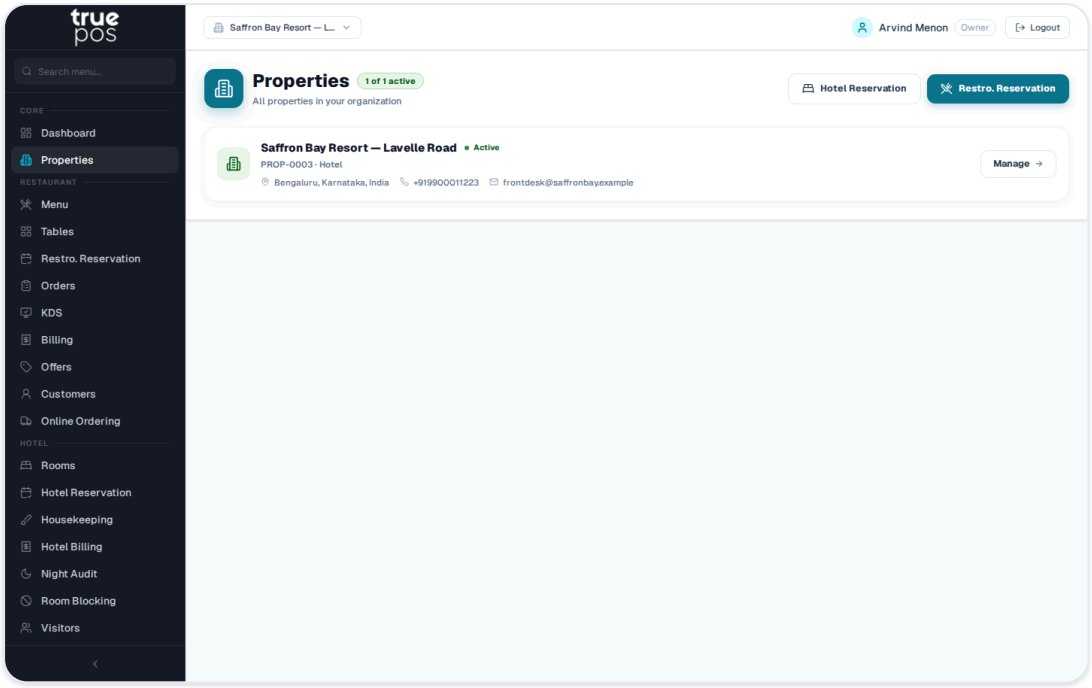
Properties are added to your account by your truePOS partner when your subscription is activated. You can't create them yourself, so contact your partner when you open a new location.

Viewing your properties

Go to **Properties**. Every property in your organisation is listed with its status:

Status	Meaning
Active	Licensed and ready to use
Inactive	No active subscription key, so staff can't select it. Contact your partner to activate it.

Click **Manage** to open a property.



The Properties list

Property details

Each property's page has these sections:

Section	What it holds
General	The property's name, type and status
Contact & Location	Address, phone and email, used on bills, invoices and guest messages
Subscription	The plan and licence this property is activated with
Operational Settings	The **GSTIN** for this branch, and its **Working Hours**

Setting the GSTIN

Enter the property's **GSTIN** (GST Identification Number) under **Operational Settings**, for example `27AAAAA0000A1Z5`. Each branch can have its own GSTIN, which supports businesses registered in more than one state. The GSTIN is printed on that property's bills and invoices.

Setting working hours

Under **Working Hours**, set the opening and closing time for each day of the week, or mark a day as **Closed**. Click **Save Settings**. You'll see *Settings saved.*

> **Tip:** To work in a property day to day, choose it in the **property switcher** at the top of the screen. See *Getting Started*.

Restaurant

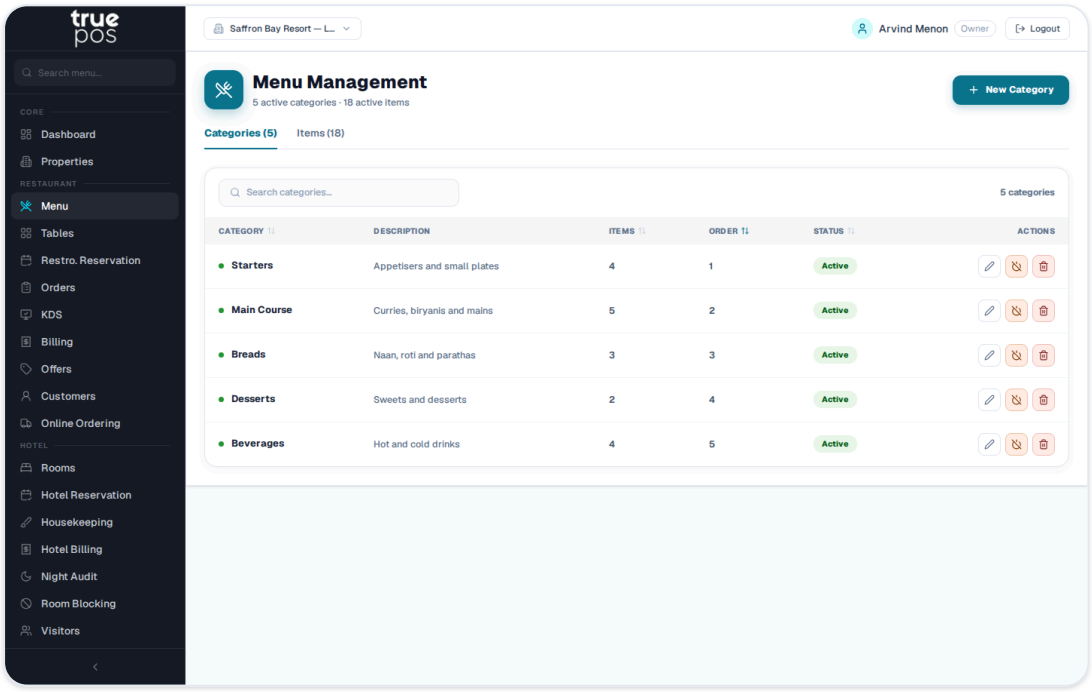
Restaurant Setup

Build your menu (categories, items, variants and recipes), import it from Excel, and lay out your floor sections and tables with QR codes for self-ordering.

For: Owners, Managers

Setting up your menu

Go to **Menu**. The screen has two tabs: **Categories** and **Items**. Create your categories first, because every item belongs to one.



Menu Management

Adding a category

1. On the **Categories** tab, click **New Category** (or **Create First Category**).
2. Enter the **Name *** (for example *Starters*) and an optional **Description**.
3. Set the **Display Order** to control where the category appears on the order screen.
4. Click **Save**. You'll see *Category created*.

Adding a menu item

1. Open the **Items** tab and click **New Item**.
2. Choose the **Category ***. If the item should also appear under other categories, select them in **Also available in**.
3. Enter the item's name, **Base Price (₹) *** and **HSN/SAC Code** (needed for GST invoices).
4. Set the **Sort Order**, and whether the item is **Vegetarian** or **Non-vegetarian**.
5. Set the item's **Availability**.
6. Click **Save**. You'll see *Item created*.

> **Tip:** When you add a new category or item, the form stays open after you save and clears itself, so you can add several in a row. Editing an existing item closes the form after saving.

Variants (Half/Full, sizes)

For an item sold in more than one size, click **Manage variants** on the item. Enter a **Variant name** (for example *Half Plate*) and its price, click **Add**, and mark one variant as the **Default**. On the order screen, staff are asked to pick a variant when they add the item.

Recipes: linking items to stock · Inventory add-on

If you use the Inventory module, click **Manage recipe** on an item to list the ingredients it uses and their quantities. Click **Add Ingredient** for each one, then **Save Recipe**. The ingredients are then **deducted from stock automatically each time the item is served**.

> **Note:** Until an item has a recipe, serving it doesn't change your stock levels.

Importing your menu from Excel

To load a large menu at once:

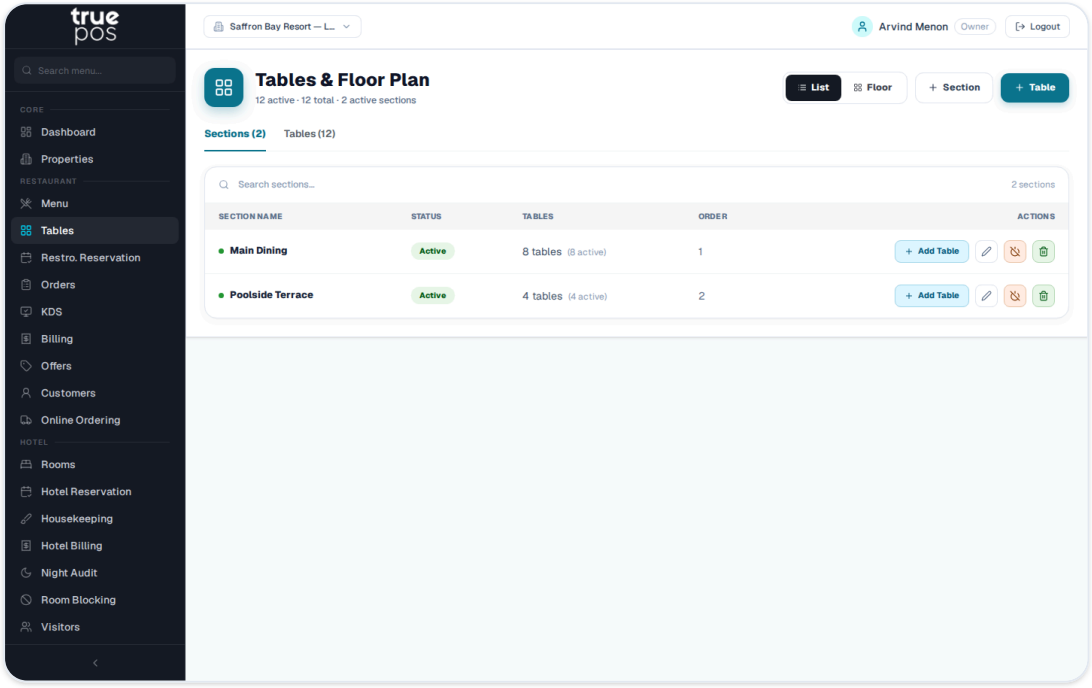
1. Click **Import Excel**.
2. Click **Download template**, and fill in your items in the downloaded file.
3. Upload the file. You'll see how many items were imported.

Switching items or categories off

Click **Deactivate** to hide an item or category, for example when a dish is unavailable for the season, and **Activate** to bring it back. **Delete** removes it permanently. Use the filter (**Active only**, **Inactive only** or **All**) to find hidden items.

Setting up floors and tables

Go to **Tables**. Tables are grouped into **sections**, for example *Indoor*, *Rooftop* or *Garden*. Create a section first, then add tables to it.



Tables & Floor Plan

Adding a section

1. Click **Section** (or **Create First Section**).
2. Enter the **Section Name *** and **Display Order**, then click **Save**.

Adding a table

1. Click **Table**, or click **Add Table** on a section.
2. Choose the **Section ***, and enter the **Table Number *** (for example *T1*) and an optional **Display Name** (for example *Table 1*).
3. Enter the **Capacity**, the number of seats.

4. Click **Save**.

List and floor views

Switch between **List**, a searchable table of sections and tables, and **Floor**, a visual floor plan. On the floor plan each table shows its live status:

Status	Meaning
Available	Free to seat guests
Occupied	Guests are seated and an order is open
Reserved	Held for a reservation
Cleaning	Being cleared and reset

To change a table's status by hand, click it and choose a new status.

QR codes for self-ordering

Every table can have its own QR code. Guests scan it with their phone to see your menu and, if you allow it, order and pay without waiting for a waiter.

1. On **Tables**, click **Show QR** on a table to see its **Table QR Code**.
2. Print it and place it on the table. Click **Open Menu** to preview what guests will see.
3. To let guests place orders from the QR menu, turn on **Allow Self-Ordering** in **Settings → Property**.
4. To let them pay online too, connect Razorpay in **Settings → Payment Gateway**. See *Settings*.

> **Note:** Hotel rooms have their own room-service QR codes. See *Housekeeping & Room Service*.

Restaurant

Orders & Kitchen

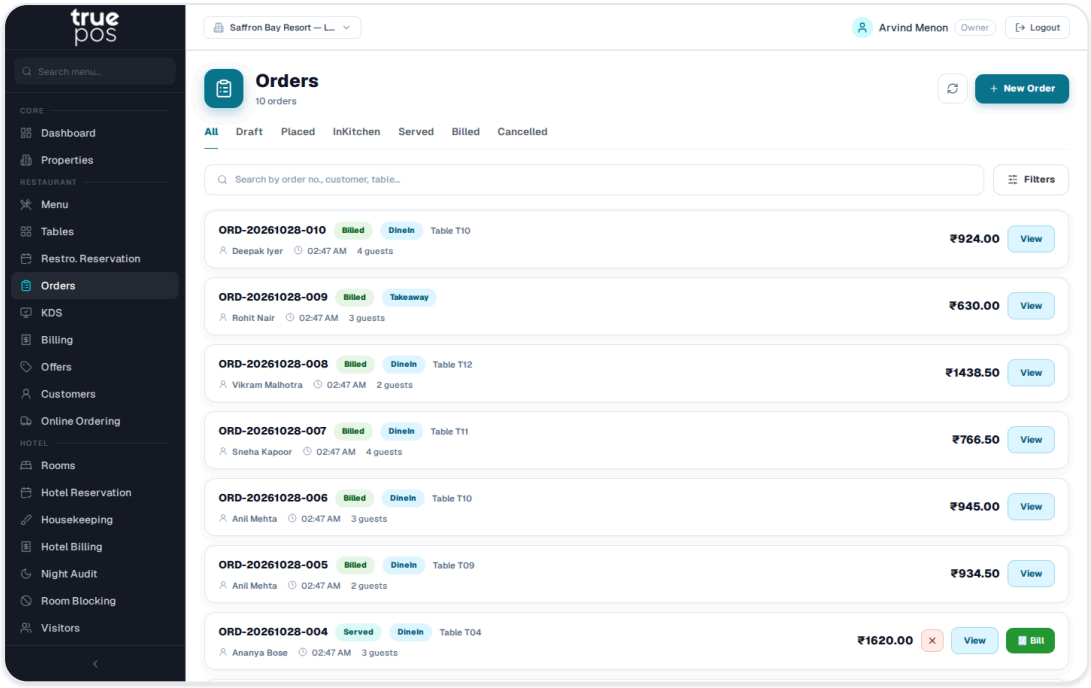
Take Dine In, Takeaway, Delivery and Room Service orders, send them to the kitchen, print KOTs, and run the Kitchen Display.

For: Waiters, Cashiers, Kitchen staff, Managers

How an order moves

Every order passes through the same stages. The status is shown as a coloured badge on the order, and the **Orders** screen has a tab for each one.

Status	Meaning
Draft	The order is being built. Nothing has gone to the kitchen yet.
Placed	The order has been sent to the kitchen and the KOT has printed.
InKitchen	The kitchen is preparing it.
Served	Every item has reached the guest. The order is ready to bill.
Billed	A bill has been generated. See *Restaurant Billing & Offers*.
Cancelled	The order was cancelled.



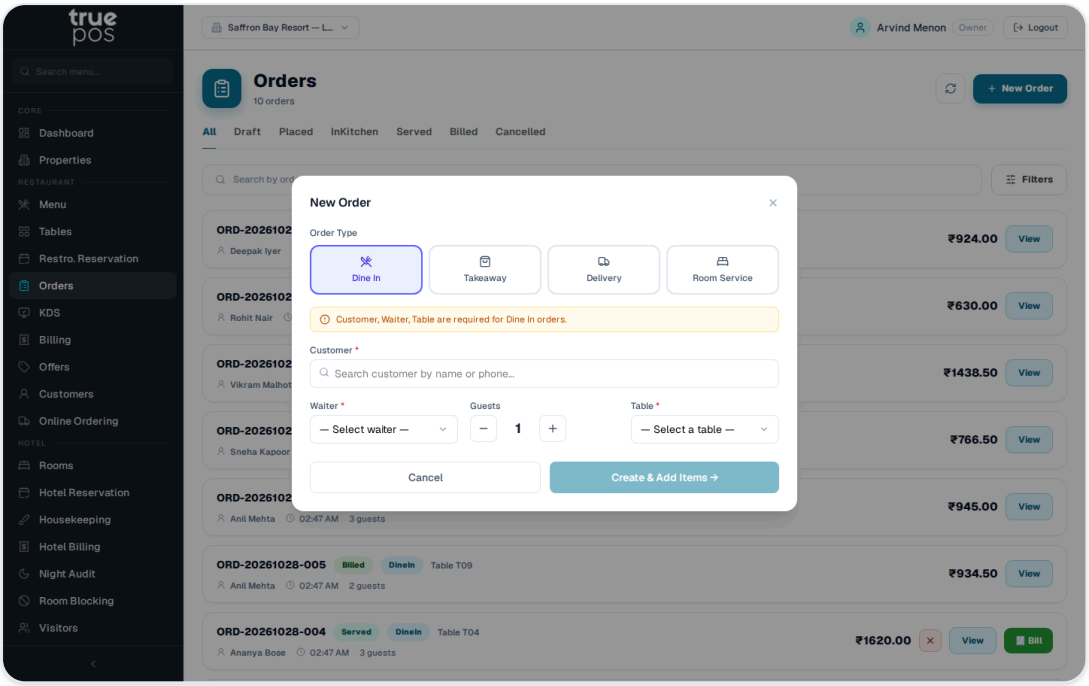
The Orders screen, with a tab for each status

Use the search box (**Search by order no., customer, table…**) to find an order quickly.

Taking a new order

> **Before you start:** choose your property in the property switcher at the top of the screen.

1. Go to **Orders** and click **+ New Order**.
2. Under **Order Type**, choose **Dine In**, **Takeaway**, **Delivery** or **Room Service**.
3. Fill in the details for that order type (see the table below). Required fields are marked *****.
4. Click **Create & Add Items** →. The order opens as a **Draft**.



The New Order form

Field	Dine In	Takeaway	Delivery	Room Service
Customer	Required	Required	Required	The in-house guest, see below
Waiter	Required*	Optional	Optional	n/a
Table	Required	n/a	n/a	n/a
Guests (number of people)	Optional	Optional	Optional	n/a
Delivery Address	n/a	n/a	Required	n/a

* When a waiter is signed in, the order is assigned to them automatically, so the **Waiter** field is hidden.

If a required field is missing, a notice above the form lists it, for example *Customer, Table are required for Dine In orders.* The **Create** button stays disabled until those fields are complete.

Finding or adding a customer

- In **Customer**, start typing a name or phone number and pick the customer from the list.
- **New customer?** Type their phone number. If nobody matches, enter their name in **Customer name**, then click **Create "‹name›" with phone ‹number›**. The customer is saved and selected in

one step.

Room Service orders · Hotel

Choose **Room Service**, then search by phone number or name for a guest who is **checked in**. The guest appears as *Room 204 — Guest name*. If you see *No checked-in guest found*, the guest must be checked in at the front desk first.

Orders from a table reservation

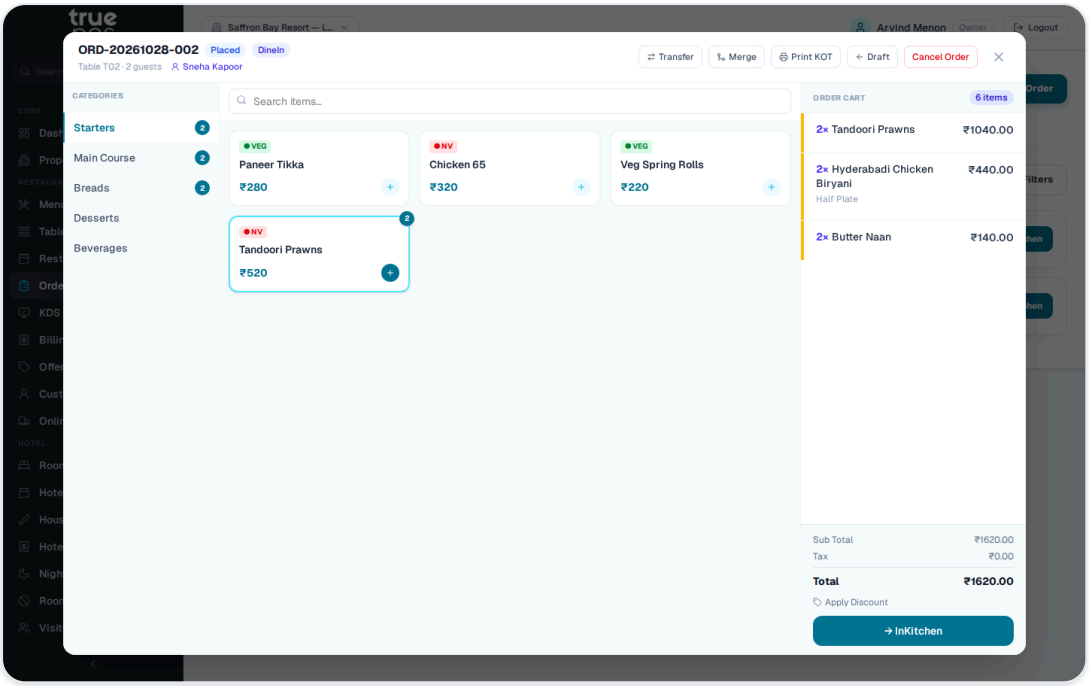
If you open an order from a restaurant reservation, the order type is fixed to **Dine In**. If the reservation covers several tables, you are asked to pick which table this order belongs to.

Adding items and sending them to the kitchen

The order screen has three panels: **Categories** on the left, the **menu items** in the middle, and the **Order Cart** on the right.

1. Pick a category, or type in **Search items…**. Veg items are marked ● **VEG** and non-veg items ● **NV**.
2. Click an item to add it to the cart. Click it again to increase the quantity.
3. If the item has **variants** (for example Half or Full), choose one in **Choose Variant**, set the **Quantity**, and add any **Notes (optional)** such as *less spicy*.
4. Check the cart. It shows the **Sub Total**, **Discount**, **Tax** and **Total**. To remove an item, use its remove button.
5. Optionally, choose an **Est. wait time** (10–60 mins) to tell the kitchen and the guest how long it should take.
6. Click **Place Order**.

You'll see *Order placed — sent to kitchen!*, and the **Kitchen Order Ticket (KOT) prints automatically**.



Adding items to an order

> **Tip:** On a phone or tablet, the cart is hidden to save space. Tap the **View Cart** bar at the bottom of the screen to open it.

> **Note:** You can add items only while an order is **Draft** or **Placed**. To add more food after that, start a new order for the same table.

Printing or reprinting a KOT

The KOT prints automatically when an order is placed. To print it again, for example after a printer jam, open the order and click **Print KOT**. The reprint carries a ***** REPRINT ***** banner, so the kitchen doesn't cook the order twice.

> **Important:** The KOT opens in a small print window. If you see *Popup blocked — allow popups to print the KOT*, allow pop-ups for the portal in your browser settings, then click **Print KOT** again.

Serving and moving an order along

- When the kitchen marks an item as **Ready**, a **Serve →** button appears next to it. Click it when the item reaches the table.
- When every item has been served, you'll see *All items served — ready to bill!* and the order moves to **Served**.
- You can also move the whole order forward with the main button (for example **→ InKitchen**), or one stage back with the button in the order header if you made a mistake.

When the order is **Served**, the main button changes to **Generate Bill**. Billing is covered in the next chapter.

Applying a discount

While the order is **Draft** or **Placed**, staff with discount permission can click **Apply Discount** in the cart, enter the discount as an amount in rupees, and click **Apply**. The cart total updates and shows *Discount applied*.

Transferring or merging tables · Dine In

- **Transfer:** moves the order to a different table, for example when guests change seats. Open the order, click **Transfer**, and choose the new table.
- **Merge:** combines two groups into one bill, for example when two parties join together. Open the order you want to move, click **Merge**, pick the table to merge into, and click **Merge Tables**. All items move to that table's order, and this order is cancelled and its table freed. You can merge only into another Dine-In order that is **Placed**, **InKitchen** or **Served**.

Both options are available only to staff who have permission to transfer and merge tables.

Cancelling an order

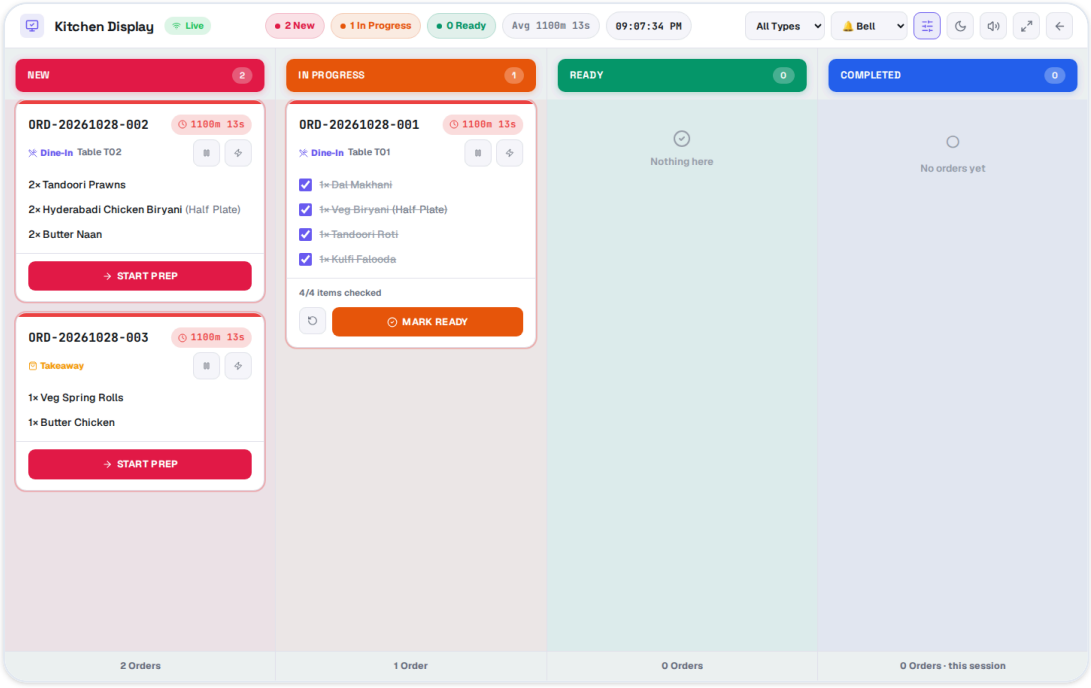
An order can be cancelled while it is **Placed** or **InKitchen**. Open it, click **Cancel Order** and confirm. You'll see *Order cancelled*.

The Kitchen Display (KDS) · Add-on

The Kitchen Display replaces printed KOTs with a live screen in the kitchen.

Opening the kitchen screen

1. Go to **KDS** in the left-hand menu. This page lists kitchen orders, with search and filters, for supervisors.
2. On the kitchen's screen or tablet, click **Launch Kitchen Display** ↗️. This opens a full-screen board designed to be read from a distance.
3. **Tap anywhere** once to turn on sound alerts. Browsers don't play sound until the screen has been touched.



The full-screen Kitchen Display

Working with the board

Orders appear as cards in three columns: **New**, **In Progress** and **Ready**. The counts are shown at the top.

Action	What it does
START PREP	Moves a new order into **In Progress**
COMPLETE	Marks the order ready to be served
Rush	Flags an urgent order in red (**RUSH**)
Hold / **Resume**	Pauses an order, for example while a course is on hold (**HELD**)
Recall	Brings back an order that was moved by mistake

At the top of the board you can:

- filter by **All Types**, **Dine-In**, **Takeaway** or **Delivery**
- sort by urgency
- switch between a light and dark theme.

Choosing the alert sound

Go to **Settings** → **KDS** and choose the **Alert sound for new orders**: Bell, Chime, Ping, Beep or None.

Restaurant

Restaurant Billing & Offers

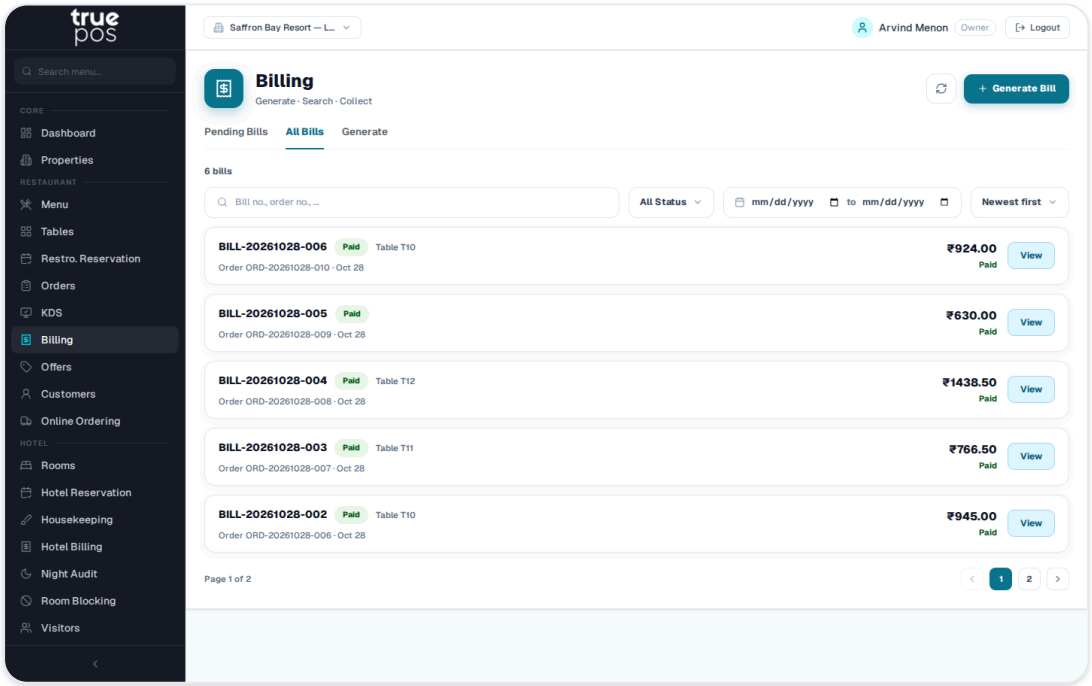
Generate GST bills, apply discounts and coupons, take cash, card, UPI and split payments, send bills on WhatsApp, and create offers.

For: Cashiers, Managers

The Billing screen

Go to **Billing** in the left-hand menu. It has three tabs:

Tab	What it shows
Pending Bills	Bills that have been generated but not yet fully paid
All Bills	Every bill, which you can filter by status (**Open**, **Paid**, **Voided**), search by bill or order number, and sort by date or amount
Generate	Served orders that are waiting for a bill, with filters for **Dine-In**, **Takeaway** and **Delivery**



The Billing screen

Generating a bill

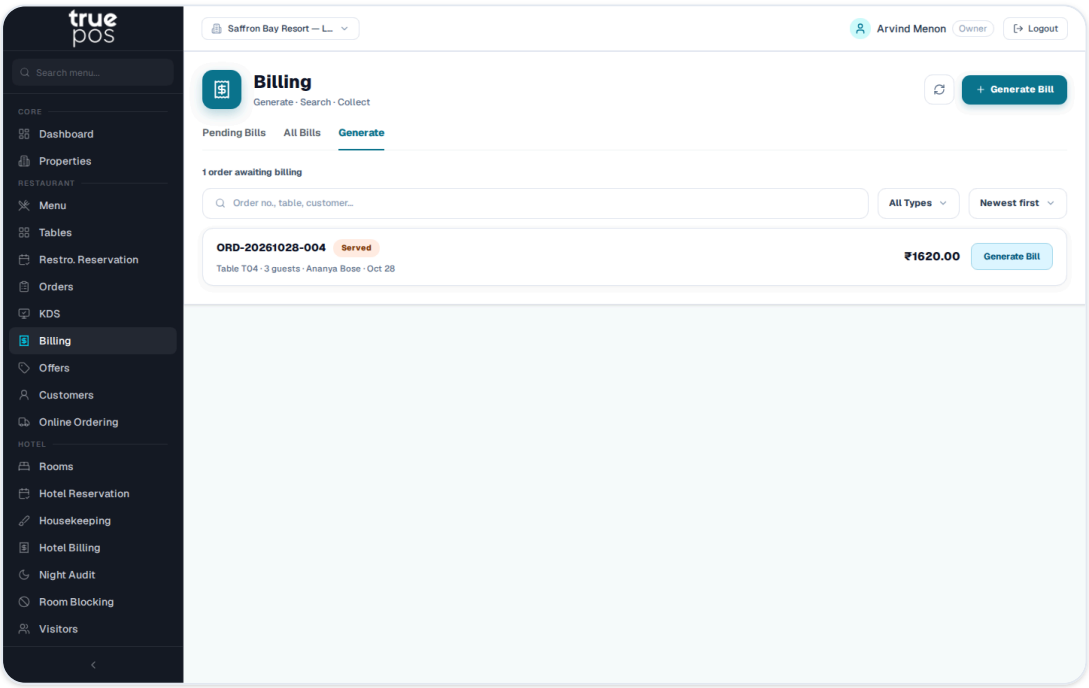
You can generate a bill from either of two places:

- from the order itself: when it is **Served**, click **Generate Bill**
- from **Billing** → **Generate**: find the order and click **Generate Bill**.

Then:

1. Choose the **GST Rate**: **0%**, **5%**, **12%** or **18%**. CGST and SGST are split automatically.
2. Choose a **Discount** if the guest is entitled to one:
    - **None**
    - **Fixed ₹**: a rupee amount off the bill
    - **Percentage %**: a percentage off the bill
    - **Coupon Code**: type the code from an offer and click **Apply** to check it is valid.
3. Add **Notes** if needed (optional).
4. Click **Generate Bill**.

You'll see *Bill ‹number› generated*, and the bill opens.



Generating a bill

> **Note:** Staff without discount permission see only the **Coupon Code** option (*Only coupon-code discounts are available to your role.*). This lets cashiers redeem genuine offers without being able to give arbitrary discounts.

Reading a bill

The **Bill Details** window shows:

- **Items Ordered**
- **Sub Total**, **Discount**, **Taxable** amount and **Total**
- **Paid** and **Balance Due**
- a **Payments Received** list showing every payment taken so far.

Taking payment

1. Under **Record Payment**, choose the method: **Cash**, **Card**, **UPI**, **Other** or **Post to Room**.
2. Enter the **Amount ₹**.
3. Click **Pay**. You'll see *Payment recorded*.

When the payments add up to the total, the bill is marked **Paid**.

Splitting a bill

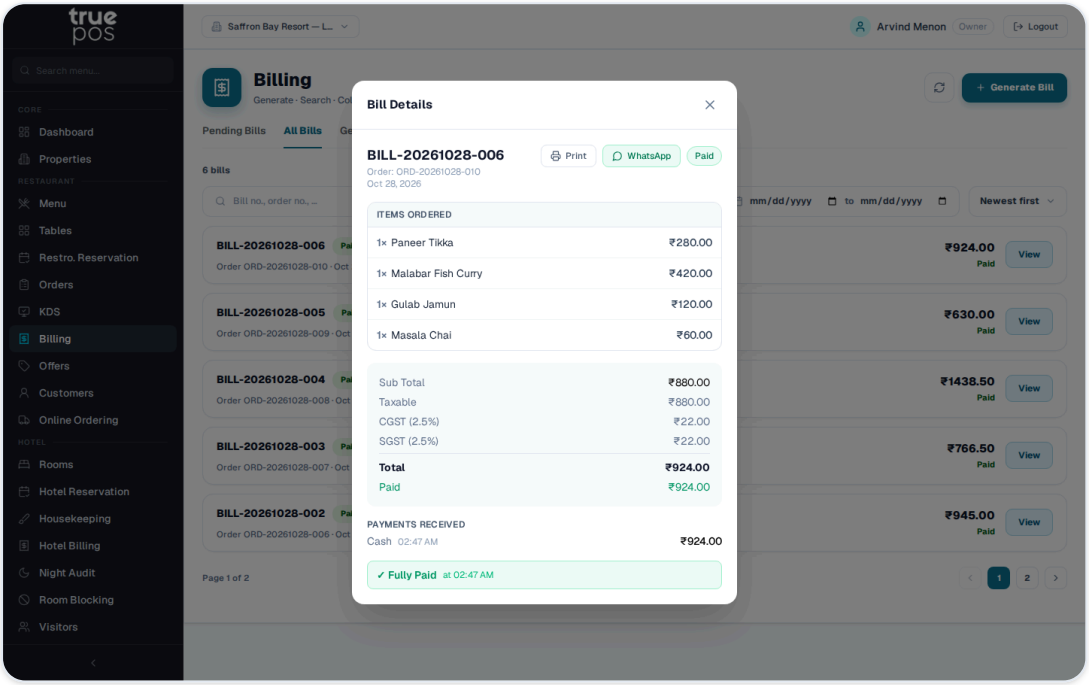
- **Paying with more than one method** (for example part cash, part UPI): record one payment for each method. The **Balance Due** goes down with each payment.
- **Sharing the bill equally**: use the **Equal Split** calculator. Enter the number of **Guests** and it shows how much each person owes. Then record each person's payment.

Charging a meal to a hotel room · Hotel

If the guest is staying in your hotel, choose **Post to Room**, then search by room number or guest name and click **Post to Room Folio**. The charge moves to the guest's folio and is settled at check-out. You'll see *F&B charge posted to guest folio*.

Printing or sending the bill

- **Print:** click **Print** to print the receipt. The layout comes from **Settings → Receipt & Printing**.
- **WhatsApp:** click **WhatsApp** to send the bill to the customer's phone. You'll see *Bill sent via WhatsApp.*



Bill details, with the Print and WhatsApp buttons

> **Note:** The **WhatsApp** button is greyed out if the customer has no phone number on file. Add the number to the customer's record and try again.

Correcting a bill

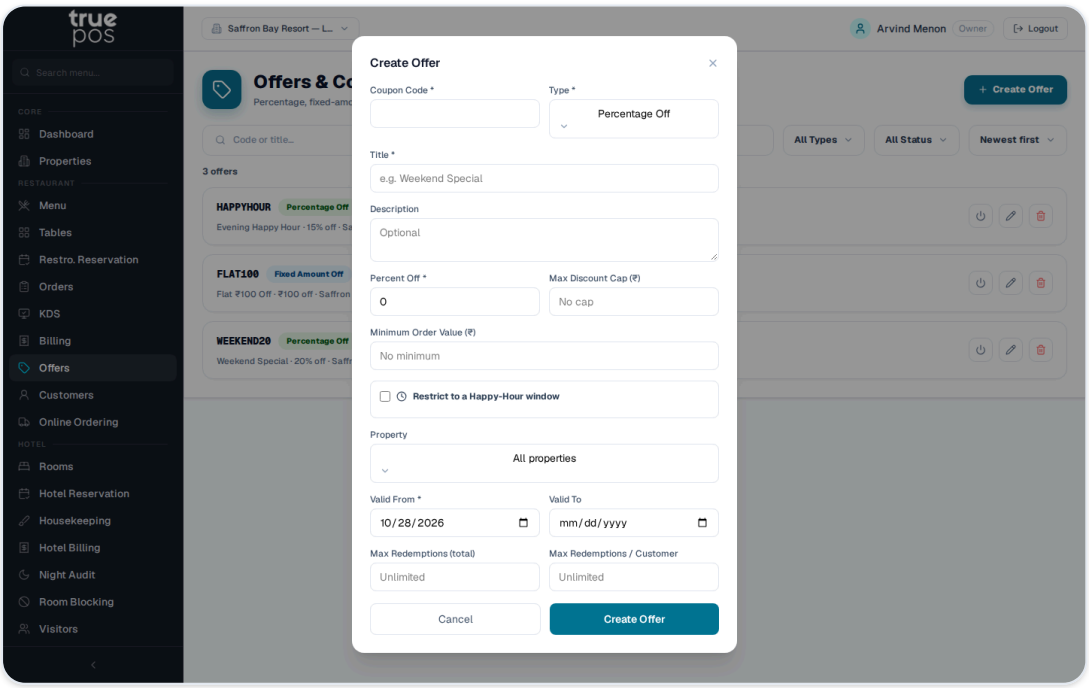
- **Before any payment is taken**, staff who can generate bills can click **Edit**, change the **GST Rate**, discount or **Notes** under **Edit Tax & Discount**, and click **Save Changes**.
- **Voiding a bill:** if a bill is wrong and has to be redone, click **Void This Bill** and confirm. The bill is cancelled and the order returns to **Served**, so you can generate a corrected bill. You'll see *Bill voided — order reverted to Served status*.

Voiding is available only to staff with void permission, and only while the bill is **Open**.

Creating an offer or coupon

Go to **Offers** and click **Create Offer**.

1. Enter a **Coupon Code**, for example `WEEKEND20`. It is converted to capital letters automatically.
2. Choose the **Type**:
   - **Percentage Off**: for example 20% off
   - **Fixed Amount Off**: for example ₹100 off
   - **Buy X Get Y**: see below.
3. Give the offer a **Title**, for example *Weekend Special*, and an optional **Description**.
4. Set any limits:
   - **Max Discount Cap (₹)**: the most a percentage offer can take off
   - **Minimum Order Value (₹)**: the smallest bill the offer applies to.
5. Choose the **Property**, or **All properties**.
6. Set **Valid From**, and optionally **Valid To** (leave it blank for no expiry).
7. Set redemption limits if you want them: **Max Redemptions (total)** and **Max Redemptions / Customer**.
8. Click **Create Offer**. You'll see *Offer created.*



Creating an offer

Buy X Get Y offers

Under **Buy (trigger items)**, choose the items or categories the guest must order and the required quantity. Under **Get (reward items)**, choose what they receive, with the quantity and the **Discount %**. Use **100** to make the reward item free.

Happy-hour offers

Tick **Restrict to a Happy-Hour window**, then set a **Start time** and **End time**. Pick the days of the week the offer runs. If you select no days, it runs every day.

Managing offers

The Offers list can be searched by code or title, filtered by type and status (**Active** or **Inactive**), and sorted, for example by **Most redeemed**. Use **Activate** / **Deactivate** to switch an offer on or off, and **Edit** or **Delete** to change or remove it.

Restaurant

Restaurant Reservations & Customers

Book tables (including several tables for a large party), seat guests, close a date when it's full, and keep your customer list.

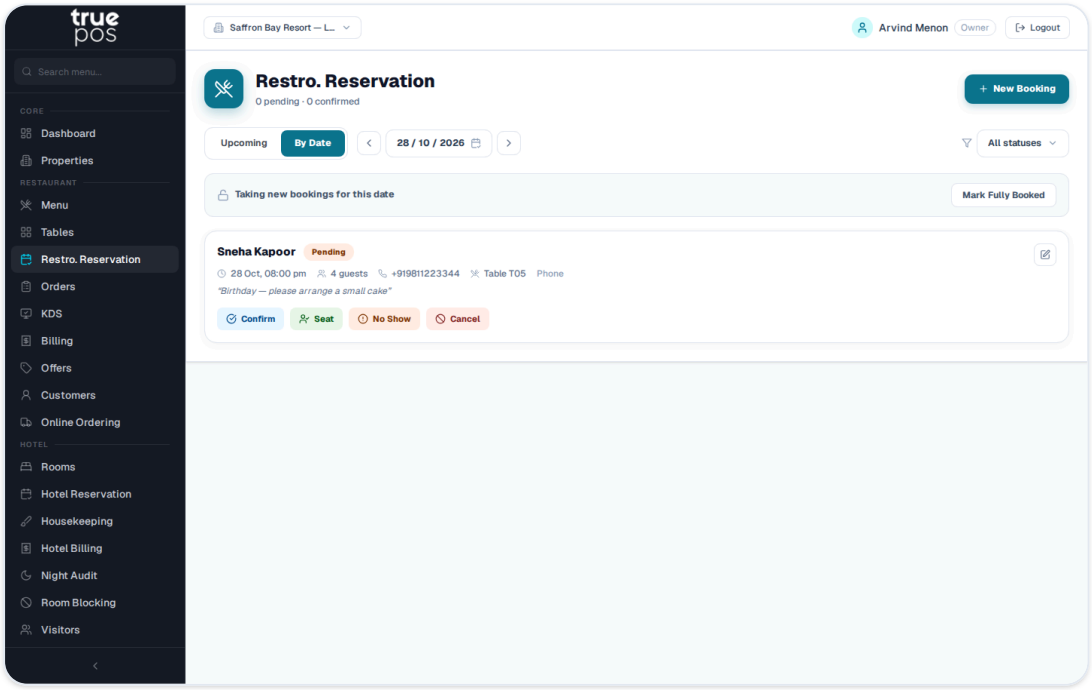
For: Hosts, Waiters, Managers

The reservations screen

Go to **Restro. Reservation**, or click **Restro. Reservation** at the top of the dashboard. There are two views:

- **Upcoming**: all future bookings
- **By Date**: the bookings for one day, with that day's **Fully Booked** status.

You can filter either view by status.



Restaurant reservations

Taking a booking

1. Click **New Booking**.
2. Enter the guest's **Phone**. If they've booked or ordered before, you'll see *Matched existing customer — details auto-filled.*

3. Check or enter the **Guest Name *** and **Email**.
4. Enter the **Party Size ***, the date and time, the **Duration (minutes)**, and where the booking came from (**Source**).
5. **Tables (optional):** pick a table now, or leave it for when the guest arrives. For a large party, select **more than one table**, and the group is seated across them.
6. Add any **Special Requests** (dietary needs, an occasion) and **Staff Notes**, which the guest never sees.
7. Click **Book**.

A booking from start to finish

Status	What it means	Action that moves it on
Pending	Booked, not yet confirmed	**Confirm**, or **Seat** if the guest has already arrived
Confirmed	Confirmed with the guest	**Seat** when they arrive
Seated	The guest is at the table	**Add Order** to start their order
Completed	Finished	Happens **automatically when the guest's bill is paid**
Cancelled	Cancelled	**Cancel Reservation** (a reason is required)
NoShow	The guest didn't arrive	**No Show** (on a Pending or Confirmed booking)

> **Tip:** Click **Add Order** on a seated reservation to open a Dine In order already linked to the booking. When that order's bill is paid, the reservation completes by itself. Use **View Order** to jump back to it.

Cancelling

Click **Cancel Reservation**, enter the **Reason *** (for example *Guest called to cancel*), and confirm. The reason is kept on the booking.

> **Note:** Once an order has been started for a reservation, the reservation can no longer be cancelled.

Closing a date: Fully Booked

When a day is full, or you're closing for a private event, open that date in **By Date** and click **Mark Fully Booked**. Add an optional **Reason**. No new reservations will be accepted for that date. Existing bookings are unaffected.

To open the date again, click **Unmark Fully Booked**.

Customers

Go to **Customers** to see everyone who has ordered or booked, with their number of **Visits** and total **Spend**. Search by name or phone.

Adding or editing a customer

1. Click **Add Customer**, or **Edit** on an existing one.
2. Enter the **Name *** and **Phone ***, plus an optional **Email**.
3. Choose the **Type**: **Registered** or **Walk-in**.
4. Tick **Do not contact for promotions** if the customer has asked not to receive marketing. Campaigns then skip them automatically.
5. Click **Save**.

> **Note:** Staff can also add a customer on the spot while taking an order. See *Orders & Kitchen*.

Customers' visits and spending feed the loyalty tiers in **Customer Insights** and the audiences you can target with **Campaigns**.

Hotel

Rooms & Front Desk

Set up room types, rooms and date-wise rates, take bookings, check guests in and out, handle walk-ins, block rooms and log visitors.

For: Front desk, Receptionists, Managers

Setting up room types

Do this once, before you add rooms. A room type (for example *Deluxe Room* or *Junior Suite*) holds the defaults that every room of that type shares.

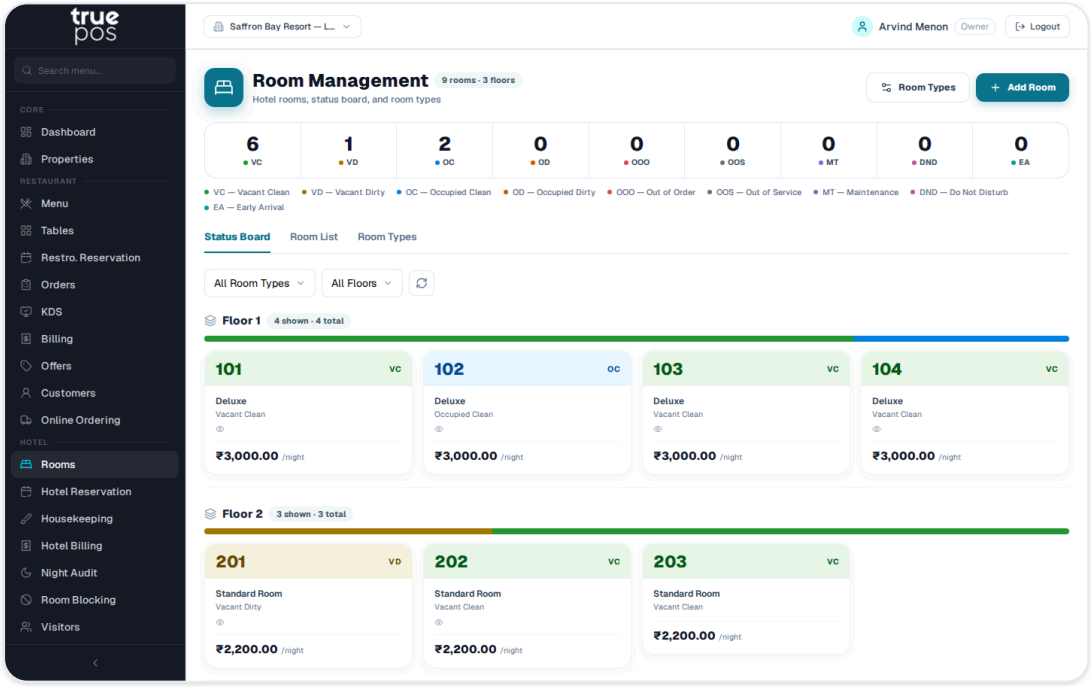
1. Go to **Rooms** and open **Room Types**.
2. Click **Add Room Type**. If you have none yet, click **Add First Room Type**.
3. Fill in the details:

Field	What to enter
Room Type Name *	For example *Deluxe Room*
Description	A short description that guests can see
Base Rate (₹) *	The normal nightly rate
Extra Bed Rate (₹)	The charge per extra bed per night
Size (sq.ft)	The room's floor area
Max Adults / **Max Extra Beds**	Occupancy limits
Child Free (yrs <)	Children younger than this age stay free
Default Rate Plan	Which meal plan applies by default (see *Meal plans* below)
Default Bed Type	For example King or Twin
Amenities	Separate items with commas, for example *AC, WiFi, Mini Bar, TV*
Photo URLs	Links to photos of the room type

1. Save the room type.

Adding rooms

1. On **Rooms**, click **Add Room** (or **Add First Room**).
2. Enter the **Room Number *** (for example *101*), the **Floor ***, and the **Room Type ***.
3. Optionally, add:
   - **Wing / Block**: for example *East Wing*
   - **Bed Type Override**: a different bed from the room type's default
   - **View**: for example *Pool View* or *Sea Facing*
   - **Connecting Room**: the room this one connects to
   - **Internal Notes**: visible to front-desk staff only.
4. Tick any that apply: **Smoking**, **Wheelchair Accessible**, **Active**.
5. Save the room.



The Rooms board, grouped by floor

The room status board

The **Rooms** screen shows every room as a tile, grouped by floor, coloured by status. A bar at the top of each floor shows its mix of statuses. You can filter by **All Room Types** or **All Floors**, or use **Search rooms…**.

Status	Meaning
Vacant Clean (VC)	Ready to sell
Vacant Dirty (VD)	The guest has left and the room needs cleaning
Occupied Clean (OC)	A guest is staying and the room has been serviced
Occupied Dirty (OD)	A guest is staying and the room needs servicing
Out of Order (OOO)	Broken or under repair, so it can't be sold
Out of Service (OOS)	Temporarily taken off sale
Maintenance (MT)	Scheduled maintenance or refurbishment
Do Not Disturb (DND)	Skip housekeeping on this visit
Early Arrival (EA)	The guest checked in before the standard check-in time

To change a room's status, click its tile, choose the new status, and click **Apply Status**. For **Out of Order**, **Out of Service** and **Maintenance**, you must also enter a **Reason**, and you can add an **Expected return date**.

> **Tip:** Statuses also change automatically. Checking a guest out sets the room to **Vacant Dirty**, so housekeeping knows to clean it.

Setting date-wise rates (rate calendar)

Use the rate calendar to charge more at weekends or during festivals, or to stop selling a room type on certain dates.

1. On a room type, click the **Rate & inventory calendar** icon.
2. Under **Set rate / availability for a date range**, choose **From** and **To** dates.
3. Enter the **Rate (₹)** for those dates. To stop bookings on them, tick **Stop-sell (closed)** instead.
4. Save. You'll see *Rate calendar updated*.

To remove your changes for a period, select it and click **Revert to Default**.

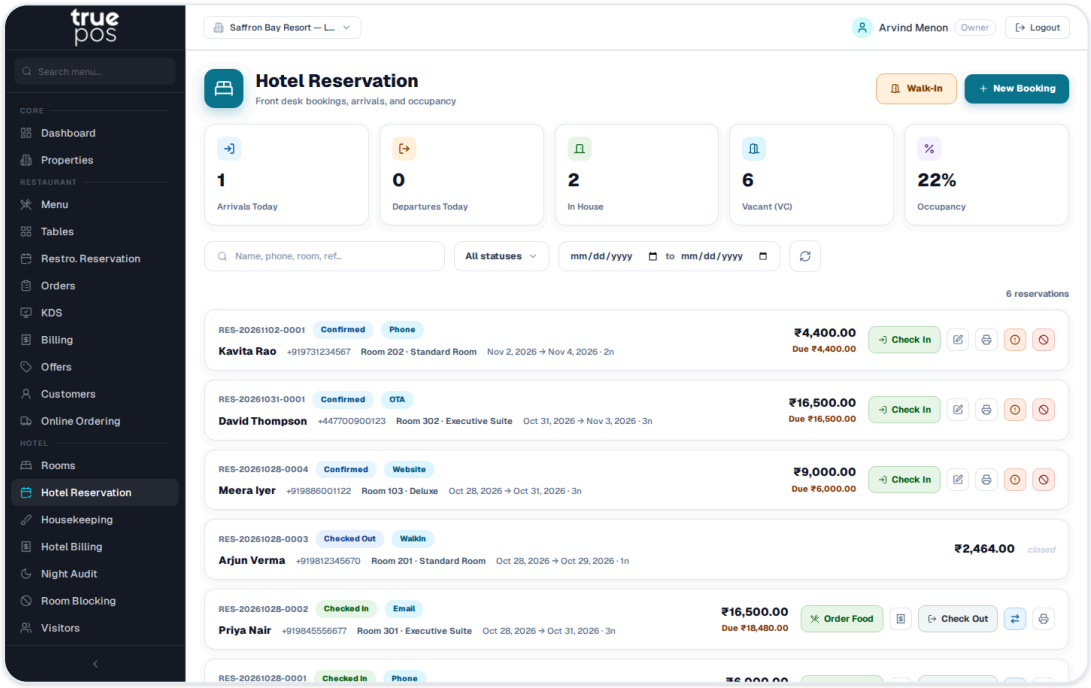
Meal plans

Plan	Includes
EP (European Plan)	Room only, no meals
CP (Continental Plan)	Room and breakfast
MAP (Modified American Plan)	Room, breakfast and dinner
AP (American Plan / Full Board)	Room and all three meals

The front desk screen

Go to **Hotel Reservation**. The top of the screen shows today at a glance: **Arrivals Today**, **Departures Today**, **In House**, **Vacant (VC)** and **Occupancy**.

Below that, every booking is listed. Search by **Name, phone, room, ref…**, filter by status (**Confirmed**, **Checked In**, **Checked Out**, **Cancelled**, **No Show**), or filter by check-in dates.

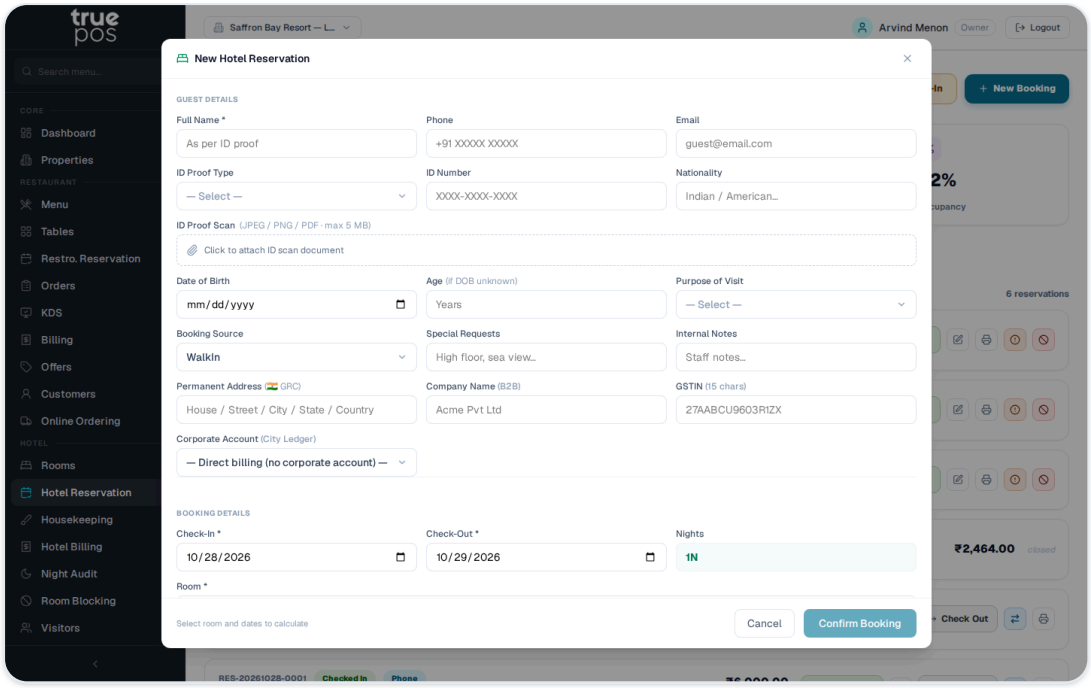


The front desk screen

Taking a new booking

1. Click **New Booking**.

2. Under **Guest Details**, enter the guest's **Full Name *** exactly as it appears on their ID, and their **Phone** and **Email**.
    - If the guest has stayed before, a **Repeat Guest** banner appears showing their number of previous stays, when they last stayed, and their total spend.
3. Add identity details: **ID Proof Type** (Aadhaar, Passport, PAN, Voter ID, Driving Licence or Other), **ID Number** and **Nationality**. You can attach a scan of the ID.
4. Enter the **Date of Birth**, and the age is filled in for you. If the date of birth isn't known, type the age directly.
5. Choose the **Purpose of Visit** (Business, Leisure, Transit, Medical, Education or Other) and the **Booking Source** (Walk-in, Phone, Email, OTA or Website).
6. Add any **Special Requests** (for example *High floor*) and **Internal Notes** for staff.
7. **Corporate guests:** enter the **Company Name** and **GSTIN** for a GST invoice in the company's name. To bill the company on credit, choose its corporate account. The bill is then *posted to the corporate ledger at checkout*.
8. Under **Booking Details**, choose the **Check-In *** and **Check-Out *** dates. The number of **Nights** is calculated for you.
9. Choose the **Room *** from the list of rooms available for those dates. Then enter the **Adults**, **Children** and **Extra Beds**.
10. Choose the **Rate Plan** and check the **Rate / Night (₹)**.
11. Enter any **Advance (₹)** received. The **Total / Balance** updates as you go.
12. Click **Confirm Booking**.



A new hotel booking

> **Note:** If you see *No rooms available — adjust dates or check room statuses*, every suitable room is booked, blocked or out of order for those dates.

Walk-in guests

For a guest who arrives without a booking, click **Walk-In**. The form is the same as a new booking, but the guest is booked and **checked in in one step**, and the booking source is set to Walk-in.

Checking a guest in

1. Find the booking (it shows as **Confirmed**) and click **Check In**.
2. Confirm. The booking becomes **Checked In**, and the room becomes occupied.

To print the **Guest Registration Card (GRC)** for the guest to sign, click **Print GRC**.

During the stay

For a guest who is **Checked In**, you can:

Button	What it does
Order food from the in-house restaurant	Opens a Room Service order for this guest. See *Orders & Kitchen*.
Log a charge for food ordered from outside	Adds a charge to the guest's bill for food ordered from outside, for example through Zomato or Swiggy. Enter a **Description** and **Amount (₹)**, then click **Log Charge**. No kitchen ticket is created.
Change Room	Moves the guest to another available room. Pick the room and click **Move Guest**. The old room becomes **Vacant Dirty**.
Edit	Changes the booking details

Checking a guest out

1. Find the guest (they show as **Checked In**) and click **Check Out**.
2. In **Check Out Guest**, the final amount is calculated for you. To charge a different amount, enter it under **Final Amount Override (₹)**. Otherwise leave it blank.
3. Click **Check Out**.

The room becomes **Vacant Dirty** for housekeeping. To settle the guest's folio and issue the GST invoice, see *Hotel Billing & City Ledger*.

Cancellations and no-shows

On a **Confirmed** booking:

- click **Cancel** to cancel it, for example when the guest phones to cancel
- click **No Show** if the guest never arrived.

You can add a **Reason** (for example *Guest cancelled by phone*), then confirm with **Cancel Booking** or **Mark No-Show**.

Blocking a room

Use **Room Blocking** to take a room off sale for a period, for example for maintenance or to hold it for a VIP.

1. Go to **Room Blocking** and click **Block Room**.

2. Choose the **Room ***, **From *** and **To *** dates, and a **Reason ***: Maintenance, Deep Cleaning, VIP Hold, Renovation, Out of Order or Other.
3. Add **Notes** if needed, then click **Block Room**.

Blocks for the next 30 days are listed on the page. To release a block, remove it from the list and confirm.

Visitor register

Use **Visitors** to record people who visit in-house guests, for security.

1. Go to **Visitors** and open **Visitor Check-In**.
2. Enter the **Visitor Name ***, their **Phone** and, if needed, their **ID Proof Type** and **ID Number**.
3. Enter the **Purpose of Visit**, the **Attending Guest** and the **Room No.**
4. Click **Check In**.

When the visitor leaves, click **Check Out** next to their name. The page lists everyone who is currently on the premises.

Hotel

Housekeeping & Room Service

Run the housekeeping task board (assign, clean, inspect, release rooms), post minibar charges, log lost-and-found items, and set up room-service QR codes.

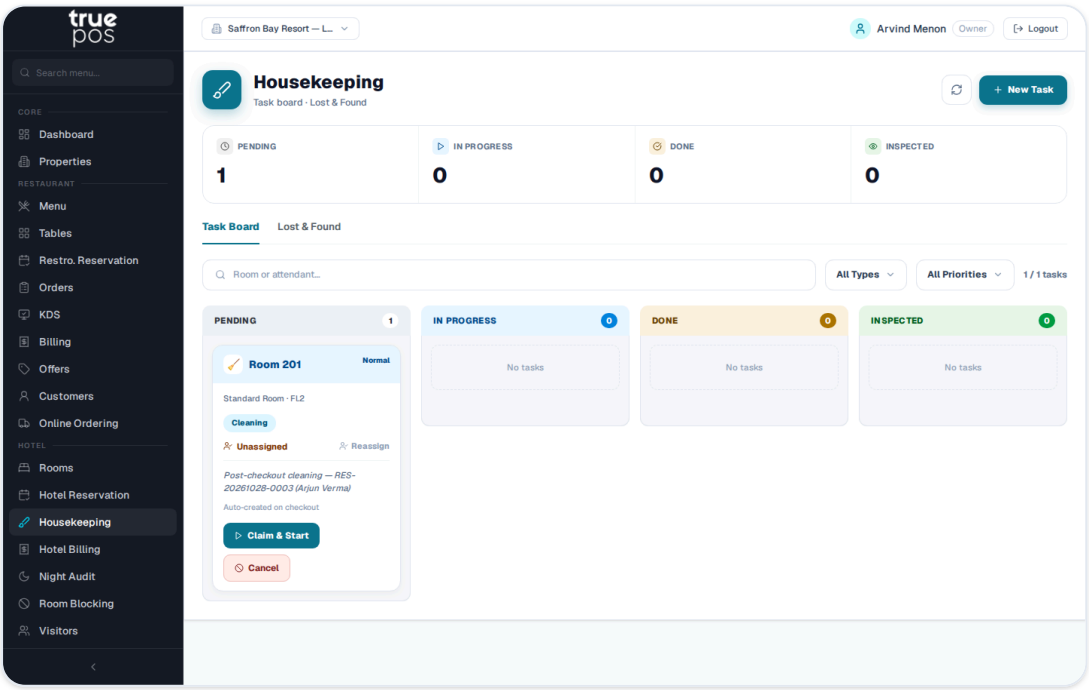
For: Housekeeping supervisors, Room attendants, Front desk

The housekeeping board

Go to **Housekeeping**. Tasks are shown as cards in four columns:

Column	Meaning
PENDING	Waiting to be started
IN PROGRESS	An attendant is working on it
DONE	Finished, waiting for a supervisor to inspect
INSPECTED	Passed inspection. The room is released for sale.

Filter the board by room or attendant, **Type**, **Priority** or **Floor**.



The housekeeping board

> **Note:** When a guest checks out, a cleaning task is **created automatically** for their room (marked *Auto-created on checkout*). You only need to create tasks by hand for other work.

Creating a task

1. Click **New Task**.
2. Choose the **Room ***, and the **Task Type**: Cleaning, Turndown, Inspection, Maintenance or Deep Cleaning.
3. Set the **Priority**: Normal, Urgent or VIP.
4. For maintenance work, choose the **Maintenance Category**: Plumbing, Electrical, Furniture, AC or Other.
5. Add **Notes** for the attendant, then click **Create Task**.

Working through a task

1. **Assign:** click **Assign** on the task and choose the staff member. Use **Reassign** to move it to someone else, or to take it over yourself.
2. **Start:** the assigned attendant clicks **Start**, and the task moves to **IN PROGRESS**.
3. **Finish:** when the room is done, click **Mark Done**.
4. **Inspect:** a supervisor checks the room:
    - **Pass** (**Mark as Inspected**) releases the room as **Vacant Clean**, ready to sell. You'll see *Room released to Vacant Clean.*
    - **Reject** sends it back to **PENDING**. A **Rejection Remark *** is required to explain what needs redoing.

Made a mistake? **Undo** moves a finished task back to **IN PROGRESS**, and **Send Back** returns a started task to **PENDING**. A task that's no longer needed can be cancelled.

Posting minibar charges

While servicing an occupied room, attendants can charge the minibar straight to the guest's folio:

1. On the room's task, click **Minibar**.

2. Tick the items consumed, for example *Mineral Water (500ml)*, *Soft Drink (Can)*, *Beer (330ml)*, *Chocolate Bar*, *Chips*, *Juice* or *Nuts Pack*, and set the quantities.
3. Check the **Total to post** and click **Post to Folio**.

The charge appears on the guest's bill immediately. If you see *No in-house guest found for this room*, nobody is checked in to that room.

Lost & Found

1. Open the **Lost & Found** tab and click **Log Item**.
2. Describe the item (**Item Description ***, for example *Black iPhone 15*), and choose the room it was **Found In**, or leave it as a common area.
3. Enter the **Storage Location** (for example *Front desk locker 3*) and who found it (**Found By**). Then click **Log Found Item**.

When the owner collects it, click **Handover**. Enter who it was **Claimed By *** and their **Phone**, add **Handover Notes** (for example *Showed Aadhaar as proof*), and click **Confirm Handover**. The item moves from **In Storage** to **Claimed**.

Room service

Checked-in guests can order food from your restaurant to their room.

Staff taking a room-service order

From **Hotel Reservation**, click **Order food from the in-house restaurant** on the guest's booking. Alternatively, go to **Orders → New Order** and choose **Room Service**. See *Orders & Kitchen* for the rest.

Guests ordering by QR code

Each room can have its own QR code, so guests can browse the menu and order from their phone.

1. Go to **Rooms**, and click the **Room Service QR code** icon on a room's tile.
2. Print the **Room Service QR Code** and place it in the room.

When a checked-in guest scans it, their order goes to the kitchen as a room-service order. Guests can pay at once, pay on delivery, or charge the order to their room and settle at check-out.

Hotel

Hotel Billing & City Ledger

Work with guest folios (post charges, take payments, apply discounts, settle and send the GST invoice) and bill corporate clients on credit.

For: Front desk, Cashiers, Accountants, Managers

What a folio is

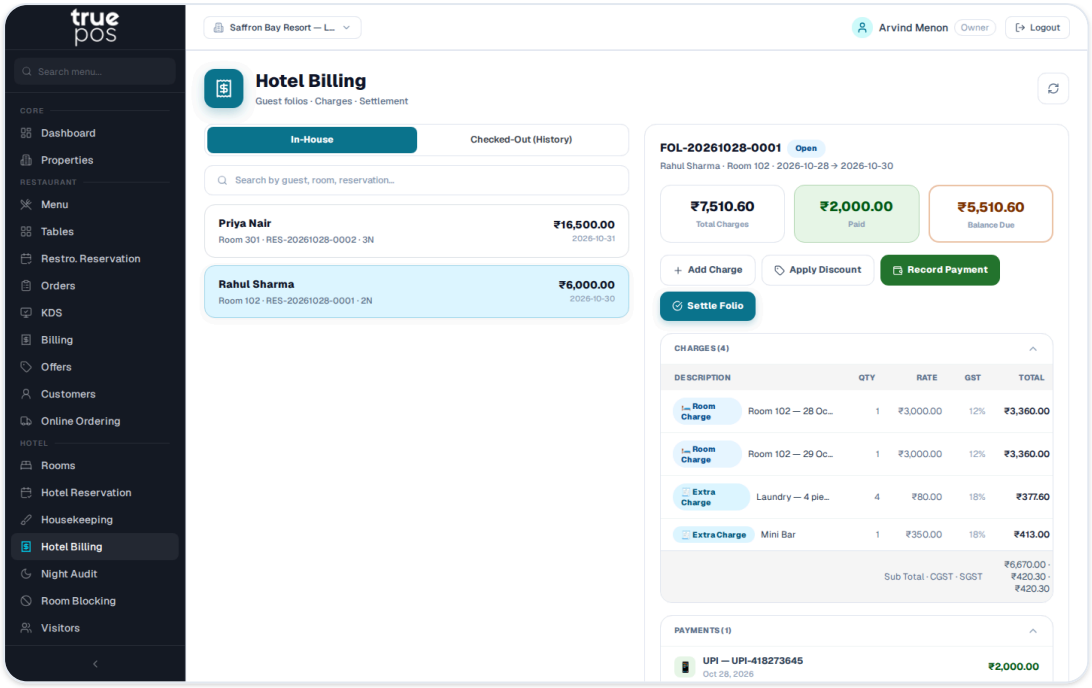
A **folio** is the guest's running bill for their stay. It is **created automatically when the guest checks in**, and everything charged during the stay is posted to it:

Charge type	Examples
Room Charge	The nightly room rate
F&B	Restaurant meals and room service charged to the room
Extra Charge	Laundry, mini bar, parking, early check-in or late check-out
Discount	Discounts given on the folio
Tax	GST

Opening a guest's folio

1. Go to **Hotel Billing**.
2. Choose **In-House** for guests who are staying now, or **Checked-Out (History)** for past stays.
3. Search by guest, room or reservation, and click the guest.

The folio opens on the right. It shows the guest, room and stay dates, every charge (with **Rate**, **GST** and **Total**), every payment, and the totals: **Total Charges**, **Paid**, and the **Balance Due** (or **Cleared**, or **Overpaid**).



A guest folio

Posting room charges

Click **Post Room Charges** to add the room rate for the nights stayed so far. You'll see *Room charges posted.*

> **Tip:** If your hotel runs the **Night Audit** every night, room charges are posted automatically and you won't usually need this button.

Adding an extra charge

1. Click **Add Charge**.
2. Choose the **Charge Type**, and enter a **Description *** such as *Laundry*, *Mini Bar* or *Parking*.
3. Enter the **Qty** and **Unit Price (₹)**, and choose the **GST %** (0%, 5%, 12% or 18%).
4. Click **Post Charge**. You'll see *Charge posted.*

Charges posted by mistake can be removed with **Void charge**.

> **Note:** Restaurant bills that staff send to the room with **Post to Room** appear on the folio automatically as **F&B** charges. See *Restaurant Billing & Offers*.

Applying a discount

Click **Apply Discount**, choose the discount type (a fixed amount, a percentage, or a coupon code), enter the value, add an optional note for the folio line, and click **Apply Discount**.

Recording a payment

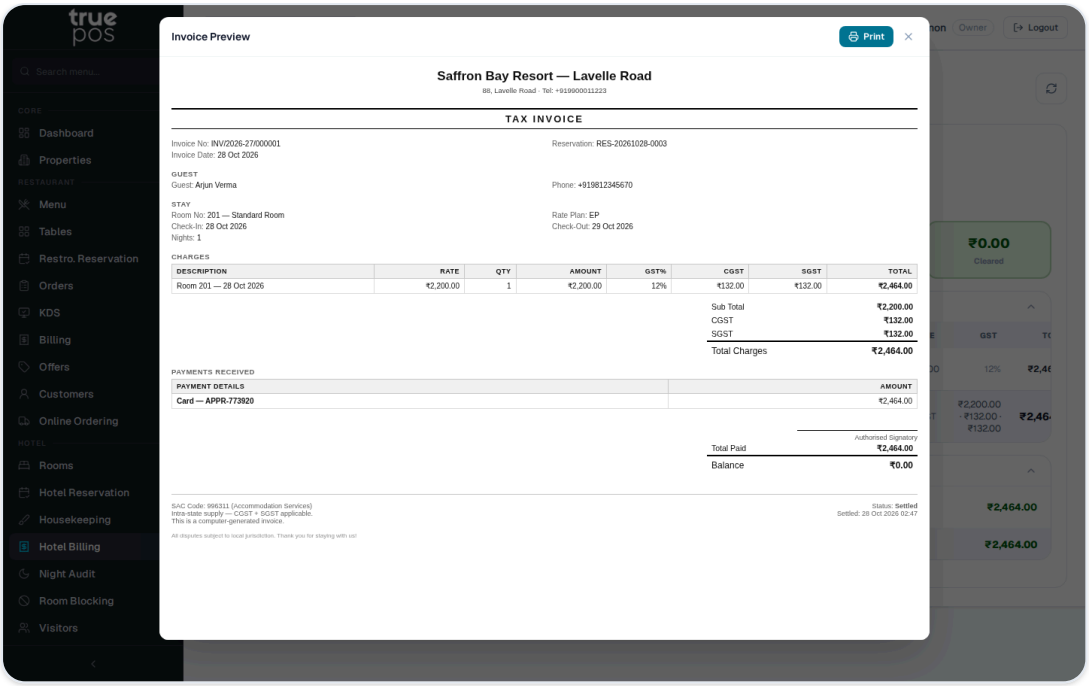
Take advances and part-payments at any time during the stay, as well as the final payment at check-out.

1. Click **Record Payment**.
2. Choose the method: **Cash**, **Card**, **UPI**, **Bank Transfer** or **City Ledger**.
3. Enter the **Amount (₹) ***.
4. For any method except cash, enter the **UPI Transaction ID** or **Reference / Approval Code**, so the payment can be matched later.
5. Add **Notes** if needed, and click **Record Payment**.

Settling the folio and issuing the invoice

When the guest checks out:

1. Post any last charges, then record the guest's final payment.
2. When the payments bring the balance to zero, the folio **settles automatically** and shows **Cleared**. To close it manually instead, click **Settle Folio**. You'll see *Folio settled.*
3. Click **Print Invoice** to preview and print the GST invoice. Click **WhatsApp** to send it to the guest's phone. Both buttons appear once the folio is settled.



The GST invoice preview

> **Important:** If you click **Settle Folio** yourself, make sure the balance is **Cleared** first. A settled folio is closed for changes, so any amount still owing should already have been collected or moved to the company's account (see *City Ledger* below).

You can choose which sections the invoice shows, in what order, and add your own text, under **Settings → Invoice Settings**. The printed invoice and the WhatsApp invoice always match.

City Ledger: billing companies on credit

The City Ledger lets a company pay later for its employees' stays. Instead of collecting from the guest at check-out, you invoice the company, for example once a month.

Creating a corporate account

1. Go to **City Ledger** and click **+ Add first account** (or the add button if accounts already exist).
2. Enter the **Company Name ***, and the **GSTIN** and **PAN** if you have them.
3. Enter the **Contact Person**.
4. Under **Phone Numbers**, click **+ Add Phone** for each number. Under **Emails**, click **+ Add Email** for each address. Use **Mark as primary** to choose the main number and email.

5. Enter the **Billing Address**, a **Credit Limit (₹)** and the **Payment Terms**: **Immediate**, **Net 15**, **Net 30** or **Net 45**.
6. Click **Create Account**.

Linking a stay to the company

When you take the booking, choose the company's corporate account in the booking form (see *Rooms & Front Desk*). At check-out, the stay is posted to the company's ledger and shows under the company's **Unbilled Stays**.

Invoicing the company

1. In **City Ledger**, select the company.
2. Open **Generate Corporate Invoice**. Under **Select Reservations to Bill**, tick the stays to include, or click **Select all**.
3. Set the **Invoice Date** and **Due Date**, and add **Notes** such as a PO number.
4. Generate the invoice. You'll see *Invoice ‹number› generated — ‹amount›*.

The company's invoices are listed with their status: **Unpaid**, **Overdue** or paid. The **Outstanding** figure shows the total the company owes.

Recording the company's payment

When the company pays, click **Record Payment**, enter the **Amount (₹)** and a **Reference / Notes** such as an NEFT reference or cheque number, and click **Record Payment**.

Hotel

Night Audit

Close the hotel's business day, posting nightly room charges, queuing rooms for housekeeping, marking no-shows and reconciling the cashier.

For: Night managers, Front desk managers

What the night audit does

Run the night audit once at the end of every business day. In one step it:

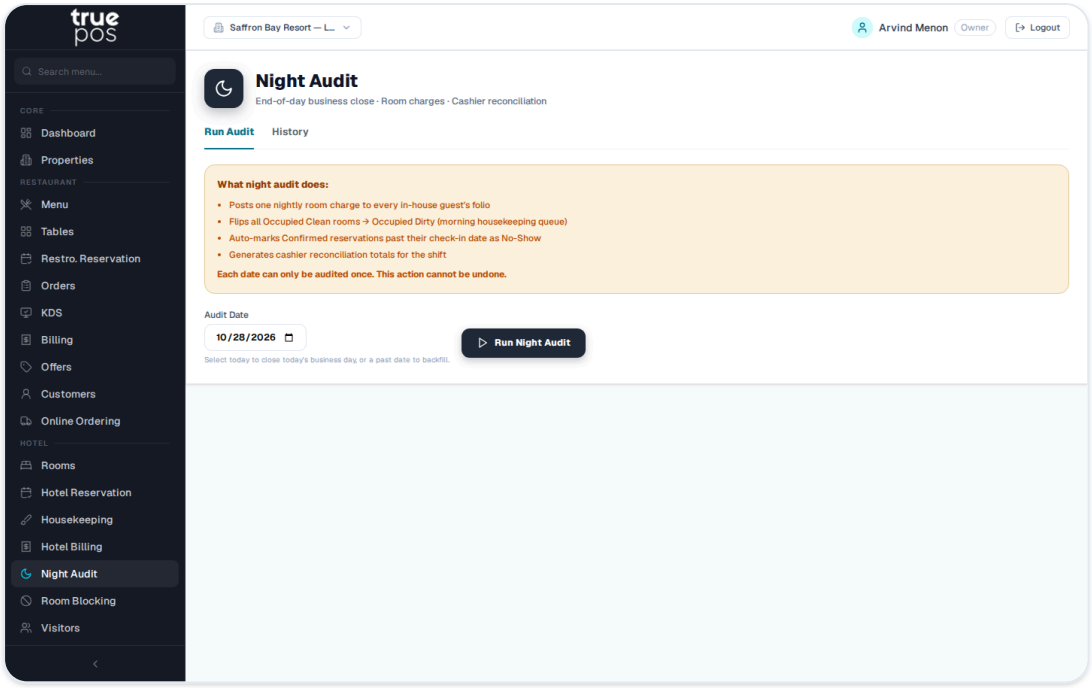
1. **Posts one night's room charge** to every in-house guest's folio.
2. **Moves every Occupied Clean room to Occupied Dirty**, so it appears in the morning housekeeping queue.
3. **Marks as No-Show** any **Confirmed** reservation whose check-in date has passed without the guest arriving.
4. **Produces the cashier reconciliation**: the day's totals for checking against the cash drawer.

> **Important:** Each date can be audited only once, and an audit can't be undone. Check that the day's check-ins, check-outs and payments are entered before you run it.

Running the audit

1. Go to **Night Audit**.
2. Choose the **Audit Date**. Select today to close today's business day, or a past date to catch up on a day that was missed. You can't audit a future date.
3. Click **Run Night Audit**.

When it finishes, you'll see *Night audit complete — N room charges posted*, followed by a summary.



The Night Audit screen

Reading the results

Figure	Meaning
Room Charges Posted	How many folios received a night's room charge
Room Revenue (pre-tax)	Room income for the night, before GST
GST Collected	Tax on those room charges
Rooms → OD (HK queue)	Rooms moved to Occupied Dirty for housekeeping
No-Shows Marked	Bookings marked as no-shows
Payments Received	Payments taken during the day

The **Cashier Reconciliation** table lists every guest charged, with their **Room**, **Rate**, **GST%** and the **Grand Total**.

Audit history

The **Audit History** list shows every past audit. Click **Export CSV** to download the results for your accountant.

Hotel Add-on

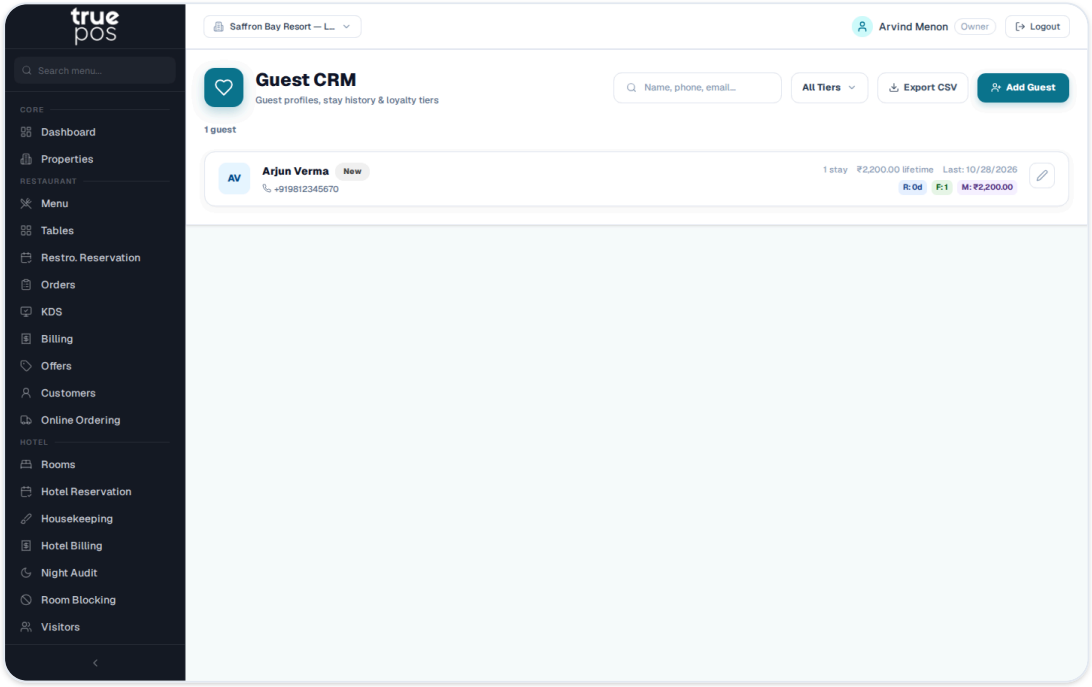
Guest CRM

Keep a profile for every hotel guest (stays, spending, preferences and loyalty tier), and merge duplicate profiles.

For: Front desk, Guest relations, Managers

Guest profiles

Every hotel booking creates or updates a guest profile automatically. Go to **Guest CRM** to see them all, then search by name, phone or email, or filter by loyalty tier. Click **Export CSV** to download the list.



Guest CRM

Each guest is placed in a **loyalty tier** (**New**, **Bronze**, **Silver** or **Gold**) according to their stays and spending, so staff can recognise your best guests.

Opening a profile

Click a guest to see their profile:

Section	What it shows
Totals	**Total Stays**, **Room Revenue**, **F&B Revenue** and **Lifetime Value**
Profile	Contact details and **Nationality**
Preferences	**Preferred Room Type**, **Preferred Rate Plan**, **Anniversary**, **Dietary Preferences** (for example *Vegetarian, Jain*), **Special Preferences** (for example *High floor, extra pillows*) and **Notes**
Stay History	Every completed stay

Update the preferences and click **Save Changes**. The front desk then has them to hand for the guest's next visit.

Tick **Do not contact for promotions** if the guest has asked not to receive marketing. Campaigns then skip them automatically.

Adding a guest by hand

Click **Add Guest**, enter the **Guest Name ***, and a **Phone** and/or **Email**, then save. A guest without a phone number or email can't be matched to future bookings or reached by campaigns.

Merging duplicates

The same person sometimes ends up with two profiles, for example when they book once with a phone number and once with an email. The Guest CRM list flags likely duplicates for you:

1. Click **Review** on a flagged pair.
2. Choose which profile to keep, and click **Merge into**.

You can also open a profile, click **Merge into another guest**, and search for the profile to keep. The merged profile's stays move to the one you keep, and the duplicate is removed.

Shared Add-on

Inventory & Procurement

Track ingredients and stock levels, record wastage, run stock takes, move stock between storage bins, and buy from suppliers through requisitions, purchase orders and goods receipts.

For: Store keepers, Chefs, Purchase managers, Accountants

How stock flows

Step	Screen	What happens
1	**Requisitions**	A department asks for what it needs
2	**Procurement → Purchase Orders**	The request becomes an order to a supplier and is approved
3	**Procurement → Goods Received Notes**	Goods arrive and are counted in. **Stock goes up.**
4	**Menu → recipes**	Each dish served uses up its ingredients. **Stock goes down.**
5	**Inventory → Wastage / Stock Take**	Spoilage and count differences are recorded
6	**Procurement → supplier bills and payments**	The supplier's invoice is matched and paid

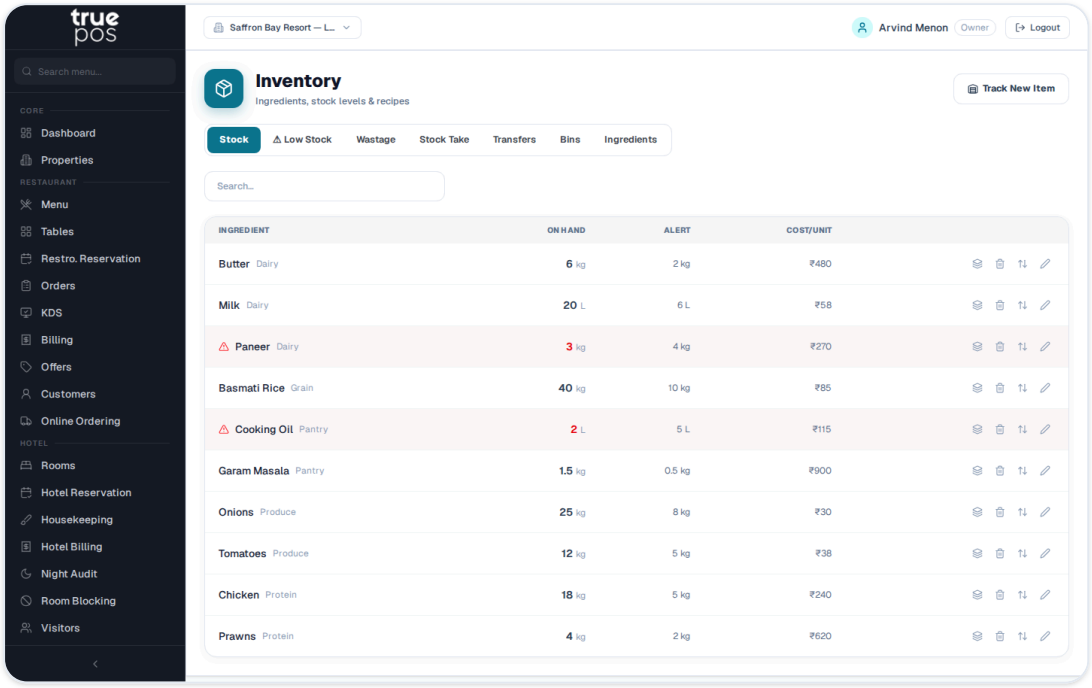
Ingredients

Go to **Inventory** and open the **Ingredients** tab. Click **New Ingredient**, enter the **Name *** (for example *Tomato*), the **Unit *** (kg, litre, piece and so on), a **Category**, and optionally the **HSN/SAC Code**, then click **Save**.

Click **Price history** on an ingredient to see what you've paid for it, **By Supplier** and in **Full History**. It also shows which supplier was **Cheapest latest**.

Stock levels

The **Stock** tab shows, for this property, each ingredient's quantity **On Hand**, its **Alert** level and its **Cost/unit**.



Inventory stock levels

- **Track New Item** starts tracking an ingredient at this property.
- **Edit settings** sets the alert level (**0 = no alert**), the storage **Bin**, and **Auto-Reorder** (a reorder point and quantity).
- **Quick adjust** corrects a quantity, for example **+5** or **−2**. Choose the **Type** (Purchase, Sale, Manual Correction or Return) and add **Notes**.
- **View batches** shows the batch numbers and expiry dates of stock received through goods receipts.

The **Low Stock** tab lists everything at or below its alert level. Click **Restock** to reorder. When everything is fine, it says *All stock levels are healthy*.

> **Tip:** With **Auto-Reorder** set on an ingredient and switched on in **Settings → Property**, a **Draft purchase requisition is created automatically** when stock falls to the reorder point.

Recording wastage

On the **Wastage** tab, record what was thrown away. Choose the ingredient, enter the quantity, and pick a **Reason**: Spoilage, Expiry, Breakage, Prep Error or Other. Some records need a manager's approval, so they show *Wastage recorded — pending approval*. A manager then clicks **Approve**, or **Reject** with a reason.

The tab shows **Total Cost (30d)** and **Records (30d)**, so you can see what wastage is costing you.

Stock take (physical count)

1. On the **Stock Take** tab, choose a bin or **All bins (whole property)**, and click **Start Stock Take**. The system records the quantities it expects.
2. Staff count each item and enter the **Counted Qty**. The screen shows the **Variance** and its **Cost Impact**.
3. When the count is finished, click **Reconcile**. Stock levels are corrected to the counted figures.

If items were sold or received while the count was in progress, they're listed when you reconcile, so nothing is lost.

Storage bins and transfers

Bins split one property's stock into storage locations, for example *Walk-in Fridge* or *Dry Storage*. Add them on the **Bins** tab. A property with no bins simply tracks stock as one total.

To move stock between locations, open **Transfers** and click **New Transfer**. Choose **From** and to, and add the items with **+ Add item**. The sender clicks **Dispatch**, and the receiver clicks **Receive**.

Purchase requisitions

Departments use requisitions to ask the purchase team for stock.

1. Go to **Requisitions** and click **New PR**.
2. Enter the **Department *** (for example *Kitchen*), who it's **Requested By**, the **Required By Date ***, and optionally a **Preferred Supplier**.
3. Add the items and quantities with **+ Add Item**, then click **Create PR**.
4. Click **Submit** to send it for approval.

A manager clicks **Approve** or **Reject**. To turn an approved requisition into an order, click **Convert to PO**, choose the **Supplier ***, and enter a **Rate ₹** for every item. You'll see *PO created*.

Suppliers

Go to **Procurement** and open the suppliers list. Click **Add Supplier** and enter:

- the **Name ***, **Contact Person**, **Phone** and **Email**
- the **GSTIN**, **PAN**, **Payment Terms** (for example *Net 30*) and **Address**.

If you deduct tax at source, tick **TDS Applicable** and enter the **TDS Rate (%)**.

Purchase orders

1. In **Procurement**, click **New PO**.
2. Choose the **Supplier ***, the **Order Date *** and the **Expected Delivery** date.
3. Add each item (**Add Item**) with its **Qty**, **Rate ₹** and **GST %**. The **Total** is calculated for you.
4. Click **Create PO**. It starts as **Draft**.
5. Click **Submit**. Then someone with enough approval authority clicks **Approve**.

PO status	Meaning
Draft	Being prepared, and can be edited
Submitted	Waiting for approval
Approved	Sent to the supplier
PartiallyReceived	Some goods have arrived
Received	Everything has arrived
Cancelled	Cancelled

> **Note:** Each role can have a **PO Approval Limit**. A purchase order above someone's limit needs a person with a higher limit to approve it. See *Users & Security*.

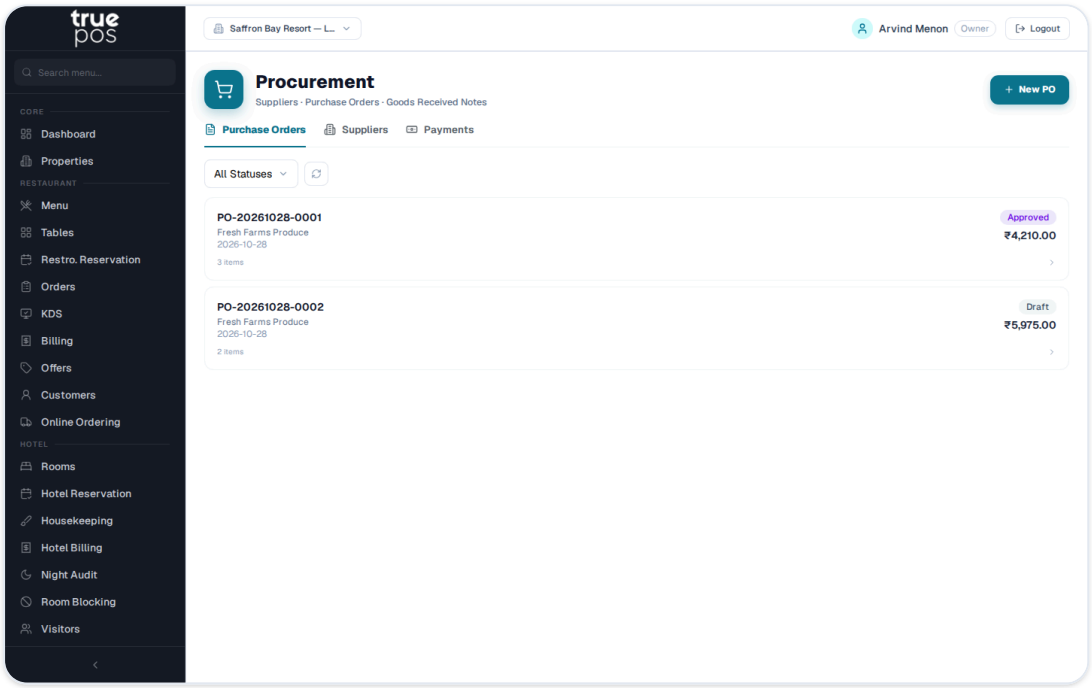
Revert to Draft unlocks an approved PO for editing, but only before any goods have been received.

Receiving goods (GRN)

When a delivery arrives:

1. Open the PO and click **Receive Goods**.
2. Enter the **Received Date**, and for each item the **Qty Received**, **Unit Cost ₹**, and optionally the **Batch No.**, **Expiry Date** and **Bin**.
3. Click **Create Draft GRN**. Check it, then click **Post GRN**.

Posting the goods received note **adds the goods to stock** and updates the average cost of each ingredient. A posted GRN entered by mistake can be undone with **Reverse**.



Purchase orders and goods receipts

Supplier bills and payments

- **Recording the supplier's invoice:** on a posted GRN, click **Record Invoice**, and enter the **Invoice Number ***, **Invoice Date** and **Invoice Amount ***. The **Match** column shows whether the invoice agrees with what was received.
- **Paying the supplier:** click **Record Payment**, and enter the **Payment Date**, **Amount ***, **Method** and **Reference Number** (UTR or cheque number). Optionally link it to an invoice. For TDS suppliers, the tax to deduct is suggested automatically and the **Net Payable** is shown.

Each supplier's page shows **Total Bills**, **Amount Paid** and **Outstanding**. The payments ledger can be searched and filtered by supplier, method and date.

Shared Add-on

Staff, Shifts & Payroll

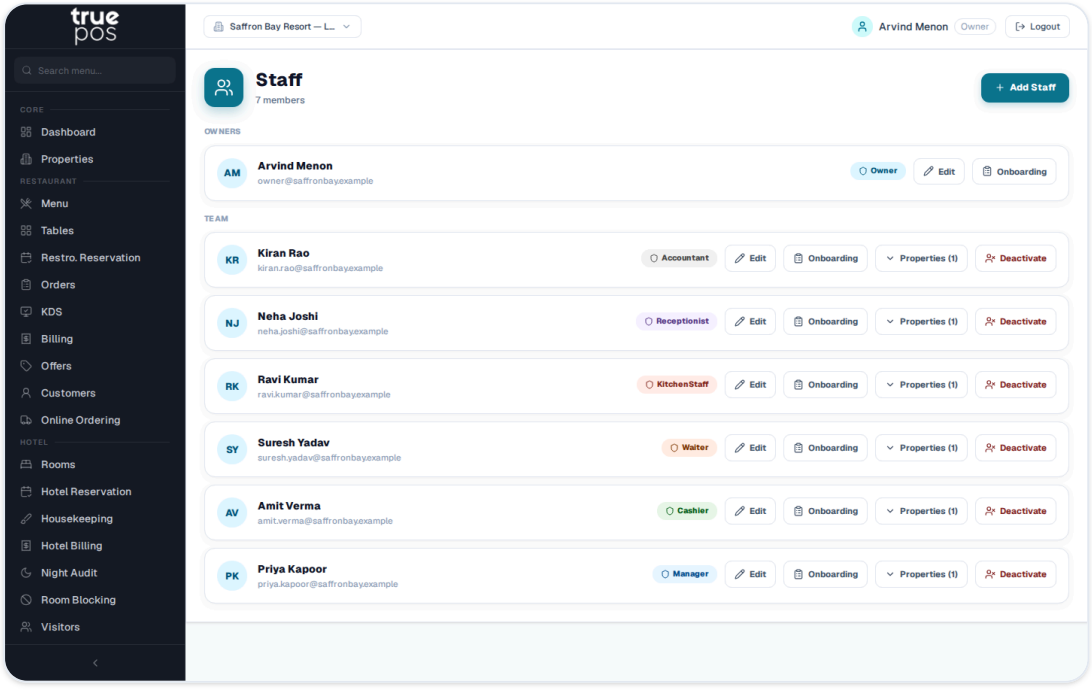
Add staff and give them access, plan shifts, record attendance with a QR code, manage leave and advances, and run payroll with PF, ESI and professional tax.

For: Owners, Managers, HR, Accountants, All staff

Adding a staff member

1. Go to **Staff** and click **Add Staff**.
2. Enter their **First Name**, **Last Name**, **Email** and a starting **Password**, plus a **Phone (optional)**.
3. Choose their **Role**: Manager, Cashier, Waiter, Kitchen Staff, Receptionist or Accountant. The role decides what they can see and do (see *Users & Security*).
4. Click **Create**. You'll see *Staff member created.*

Give them their email address and password, and they can sign in straight away.



The staff list

Giving access to a property

A staff member works only in the properties they're assigned to. On their card, choose a property and click **Assign**. Click **Remove** to take access away.

Changing a role or deactivating someone

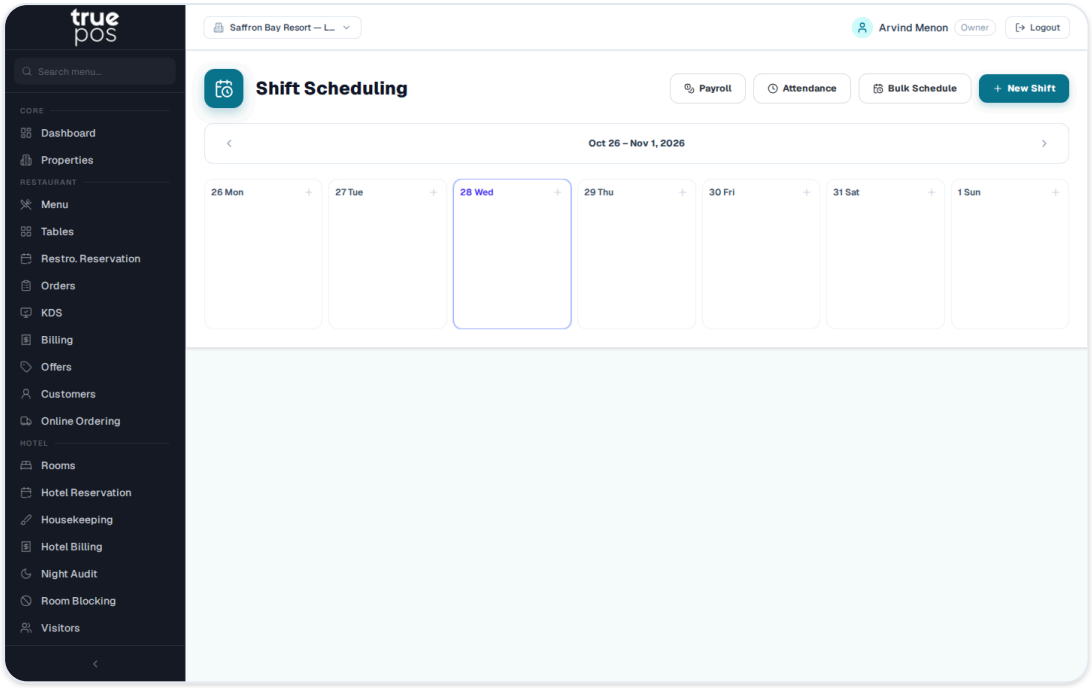
- **Edit** changes their name, phone and **Default Property**.
- **Change Role** changes their **Base Role**. This swaps their default permissions and signs them out, so the change takes effect immediately.
- **Deactivate** blocks their login when someone leaves. Their history stays in the system.

Planning shifts

Go to **Shifts** to see the week's roster as a calendar (Mon–Sun).

1. Click **New Shift** (or **Add shift** on a day).
2. Choose a **Shift Name** (for example Morning, Evening or Night) or **Custom**, and set the **Start Time** and **End Time**.
3. To create the same shift on many days, tick **Repeat across a date range**, choose the dates, and pick **On these days**.
4. Tick **Publish (visible to assigned staff)** when the shift is final.
5. Save, then click **Assign Staff** and pick who works it.

Shift status (per person)	Meaning
Scheduled	Assigned
Confirmed / **Declined**	The staff member accepted or declined
Completed	Worked
No Show	Didn't turn up



Shift scheduling

To build a whole schedule at once, for example every shift for the next month, use **Bulk Schedule**. Add one or more shifts, choose the dates and days, pick the staff, and click **Create Schedule**. The result shows which shifts were **Created** and which **Already existed**.

The **Weekly Payroll Summary** at the bottom of the page shows the hours each person was **Assigned** and actually **Worked**.

Attendance with a QR code

1. Go to **Shifts** → **Attendance** and click **Generate QR Code**.
2. Print the **Attendance QR Code** and put it up at the staff entrance.
3. Staff scan it with their phone camera to **Check In** at the start of a shift and **Check Out** at the end. They can also type the code shown on the poster.

The attendance page shows who is currently checked in. Click **Export CSV** or **Export Summary** to download attendance for payroll. If a QR poster is lost or copied, click **Regenerate** to replace it.

Leave

Staff: requesting leave

Every staff member can open **My Leave** to see their leave balances and requests. To ask for time off, click **Request Leave**, choose the **Leave Type**, the **From** and **To** dates (tick **Half day** if needed), and add a **Reason**. A pending request can be cancelled.

Managers: approving leave

In **Payroll** → **Leave**, the **Requests** list shows every leave request. Click **Approve** or **Reject**. The **Balances** view shows each person's remaining leave, and **Adjust** corrects a balance. Unpaid leave is marked **LOP** (loss of pay) and is deducted in payroll.

Setting up payroll

Do this once, in **Payroll** → **Configuration**.

Setting	What it controls
Pay Period	Monthly, Bi-Weekly or Weekly
Working Days / Month	Used to calculate daily pay and loss of pay
Provident Fund (PF)	**Employee Rate (%)**, **Employer Rate (%)** and the **Wage Ceiling**
Employee State Insurance (ESI)	Rates, and the gross-pay limit up to which ESI applies
Professional Tax (PT)	Slabs by monthly gross income, as your state requires
Overtime Pay	The **Overtime Multiplier**, for example 1.5×
Allowance Types	For example HRA, DA or Travel, as a fixed amount or a **% of Basic Salary**
Leave Types	For example Casual or Sick Leave: the yearly quota, paid or unpaid (LOP), how it accrues, carry-forward limits, and whether half days are allowed

Then, in **Payroll** → **Salary Setup**, click **Add Salary Config** for each staff member. Choose the **Pay Type** (Monthly, Daily or Hourly), the **Basic Salary**, the date it's **Effective From**, their **Allowances**,

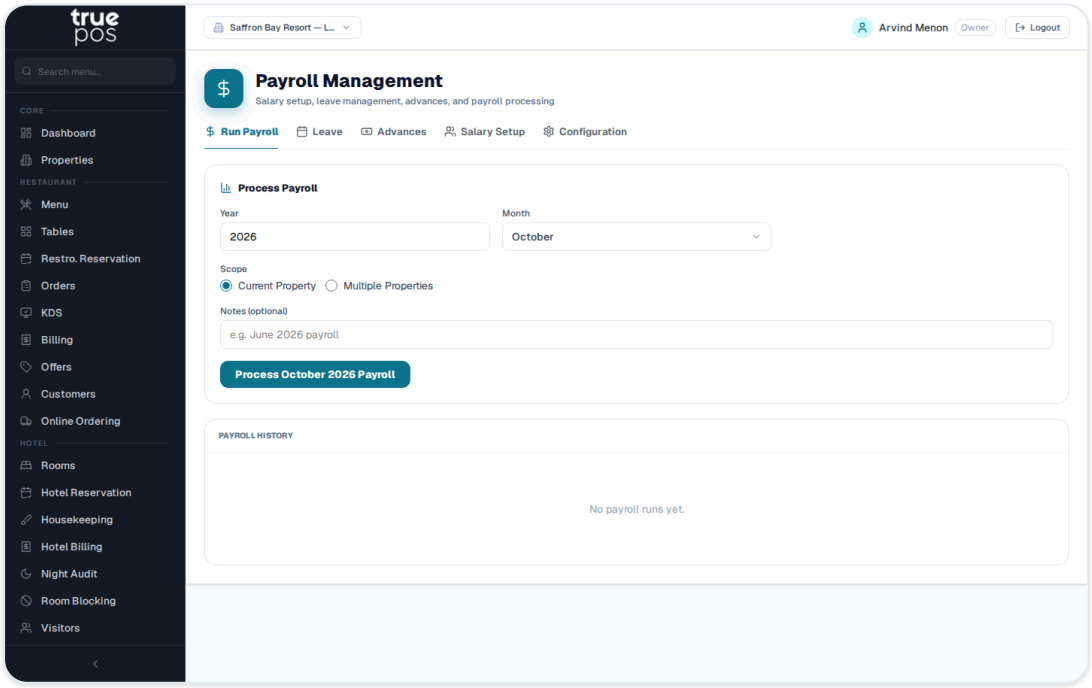
and their **Bank / UPI Details** for the payslip.

Salary advances

In **Payroll → Advances**, click **Give Advance**, choose the staff member and the **Amount (₹)**, and decide how it's recovered: **Full recovery in next payroll**, or **Split over multiple months**. Payroll deducts it automatically. An advance can also be **Waived**.

Running payroll

1. Open **Payroll → Run Payroll** and click **Process Payroll**.
2. Choose the **Year**, **Month** and **Scope**, add optional **Notes** (for example *June 2026 payroll*), and process.
3. Review each person's line: **Days Present**, **Gross**, the **PF+ESI+PT** deductions, any **Advance** recovered, and the **Net Pay**.
4. If a figure needs a manual change, click **Override**, enter the **Override Amount (₹)** and a **Reason ***.
5. When everything is right, click **Finalize**.
6. As you pay each person, click **Mark Paid**, and record the **Payment Mode** (Cash, Bank Transfer, UPI or Cheque), the **Reference / UTR** and the date.



Payroll

Past runs are listed under **Payroll History**.

Add-on

Finance & Accounting

Double-entry books for each property. Learn what is posted automatically, how to record expenses and journal entries, close months, read the financial statements, file GST, import history and reconcile the bank.

For: Owners, Accountants

How the books work

Each property keeps its own **double-entry books**. Most entries are made for you as your team works:

When this happens…	…it is posted to the books automatically
A restaurant bill is paid	Sales, GST and cash/bank
A hotel folio is settled	Room and F&B revenue, GST and cash/bank (or the City Ledger)
Goods are received (GRN posted)	Inventory, input GST and the supplier's balance
A supplier is paid	The supplier's balance and cash/bank, with any TDS deducted
Payroll is paid / an advance is given	Salaries or staff advances and cash/bank
An expense is recorded	The expense account and cash/bank

Your accountant only needs to record the items that don't come from day-to-day operations.

> **Note:** The **Finance & Accounting** menu is visible to the account owner, and to staff given finance permissions through a custom role or the **Full Access** preset. None of the ready-made staff roles include it.

Most reports offer **This Property** or **All Properties**, so owners of several outlets can see each one separately or combined.

Chart of Accounts

Go to **Finance & Accounting → Chart of Accounts**. Every account is listed with its **Code**, **Name**, **Status** and current **Balance**, grouped into Assets, Liabilities, Equity, Revenue and Expenses.

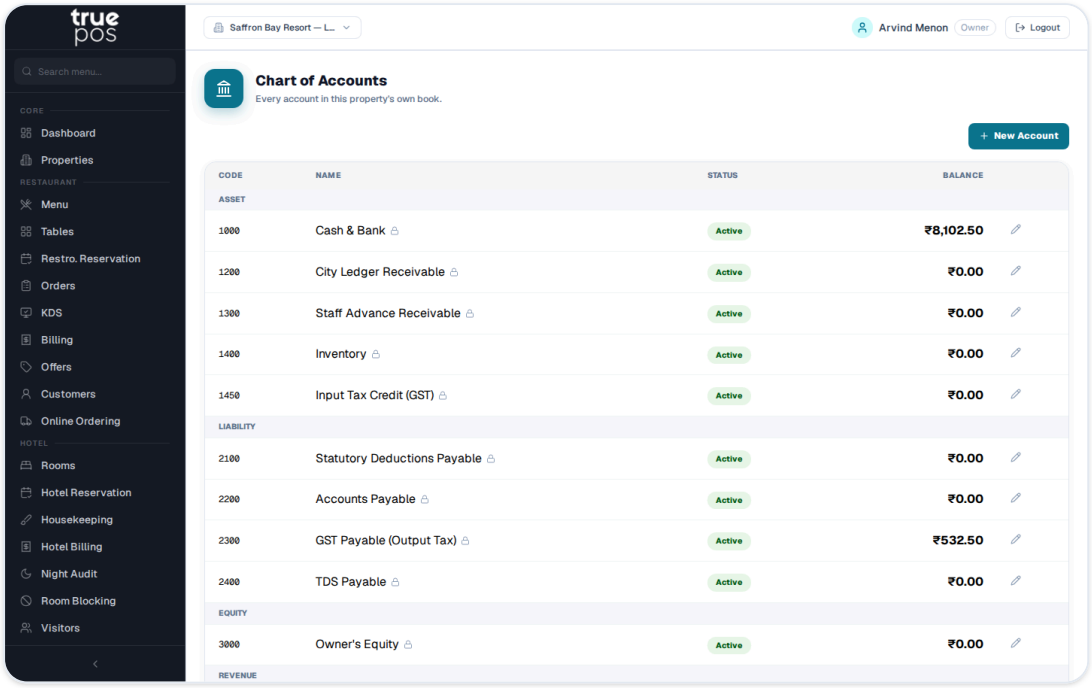


Chart of Accounts

The standard accounts are created for you, and marked as default system accounts, which can't be deactivated. To add your own, click **New Account**, choose the **Type**, and enter a **Code** (for example *5100*), a **Name** (for example *Office Rent*) and a **Description**.

Recording expenses

Go to **Expenses** and click **New Expense**.

1. Enter a **Description** (for example *Office rent — August*) and the **Amount**.
2. Choose the **Expense Account**, and how it was **Paid Via** (cash or bank).
3. Add the **Vendor** and **Notes** if useful, then save.
4. Click **Attach** to add a photo or PDF of the receipt (up to 5 MB).

Recurring Templates handle regular costs such as rent or subscriptions. Click **New Recurring Expense**, and set the **Frequency** and the **Next Due** date. Templates can be switched between **Active** and **Inactive**.

> **Tip:** If there are no expense accounts to choose from, create one in **Chart of Accounts** first.

Manual journal entries

For anything else, such as depreciation, opening balances or corrections, go to **Journal Entries** and click **New Journal Entry**:

1. Enter a **Description**.
2. Add **Lines**: choose an account, and enter a **Debit** or **Credit** amount. Click **Add Line** for each one.
3. The entry must show **Balanced** (total debits equal total credits) before you can click **Post Entry**.

The Journal Entries list shows every entry, both automatic and manual, with its **Source**.

Closing a month

Go to **Periods**, choose the **Year** and **Month**, and click **Close Period**. A closed month is **locked against new postings**, so figures you've reported can't change by accident. Every month is open until you close it.

If you must correct a closed month, click **Reopen** and give a **Reason**. The reason is recorded.

Financial statements

Statement	What it shows
Balance Sheet	Assets, Liabilities and Equity at a date. It confirms **Balanced** when the books agree.
Income Statement	Revenue and Expenses over a period, and the **Net Income**
Cash Flow	Net Income adjusted for non-cash items, giving **Cash at Start**, **Net Cash Flow** and **Cash at End**. It shows **Reconciled** when it matches the actual movement in Cash & Bank.

Choose the dates at the top of each statement.

GST return

Go to **GST Return**, choose the period (**From** and to), and click **Download GST Return (Excel)**. You get a **GSTR-1 / GSTR-3B** workbook built from your bills, invoices and purchases, ready for filing or for your tax consultant.

Importing historical data

Moving from another accounting tool such as Zoho Books? Go to **Import**, click **Download Template**, fill in your historical ledger entries, and upload the file. Each row is checked first, and you see how many are **Valid** or **Invalid**. Only then are the entries posted. You'll see how many journal entries were imported.

Bank reconciliation

1. Go to **Bank Reconciliation** and click **Download Template** to see the expected format, or use your bank's export.
2. Click **Upload Statement (.csv, .xlsx)**. Lines that clearly match your books are **matched automatically**, and you'll see how many lines were imported, auto-matched and skipped.
3. For each remaining **Unmatched** line, click **Match** and choose the corresponding entry in your Cash & Bank account. Click **Ignore** for lines that don't belong in the books, such as bank-to-bank transfers.

Use the **Unmatched**, **Matched**, **Ignored** and **All** filters to track progress. **Unmatch** undoes a wrong match.

Add-on

Reports & Analytics

Occupancy and RevPAR, revenue by department and booking source, hotel profit and loss, best-selling dishes, and customer loyalty insights.

For: Owners, Managers, Accountants

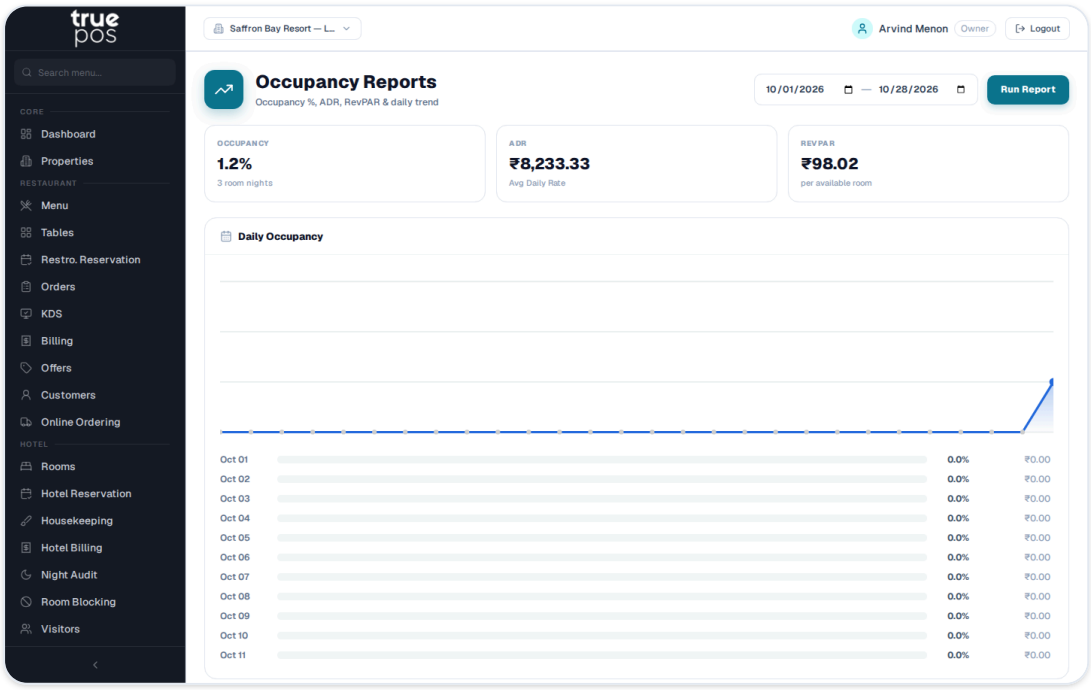
Running a report

Most reports work the same way: choose your property at the top of the screen, set the **date range**, and click **Run Report**.

Occupancy Reports · Hotel

Shows how full your rooms were over the period:

- **Occupancy %**: the share of available room-nights that were sold
- **ADR**: average daily rate, the average price paid per occupied room-night
- **RevPAR**: revenue per available room, the standard measure of how well your rooms earn
- **Daily Occupancy**: a day-by-day trend, to spot weekends, seasons and slow days.



Occupancy report

Revenue Reports

Revenue by department, with a **Hotel** tab and a **Restaurant** tab:

- **Daily Revenue**: income for each day of the period
- **Booking Sources** (Hotel): how much business came from Walk-in, Phone, Email, OTA and Website bookings, so you can see which channels pay off.

P&L Report · Hotel

A profit-and-loss view for the hotel:

Section	Includes
Revenue	**Room Revenue**, **F&B Revenue** and **Other Revenue**
Costs	Procurement (purchase) costs for the period
Results	**Total Revenue**, **Total Costs**, **Gross Profit** and **Gross Margin**

Click **Export CSV** to download it, or **Print PDF** to print it.

> **Note:** For your full statutory accounts (Balance Sheet, Income Statement and Cash Flow), use **Finance & Accounting**.

Food Sales Analytics · Restaurant

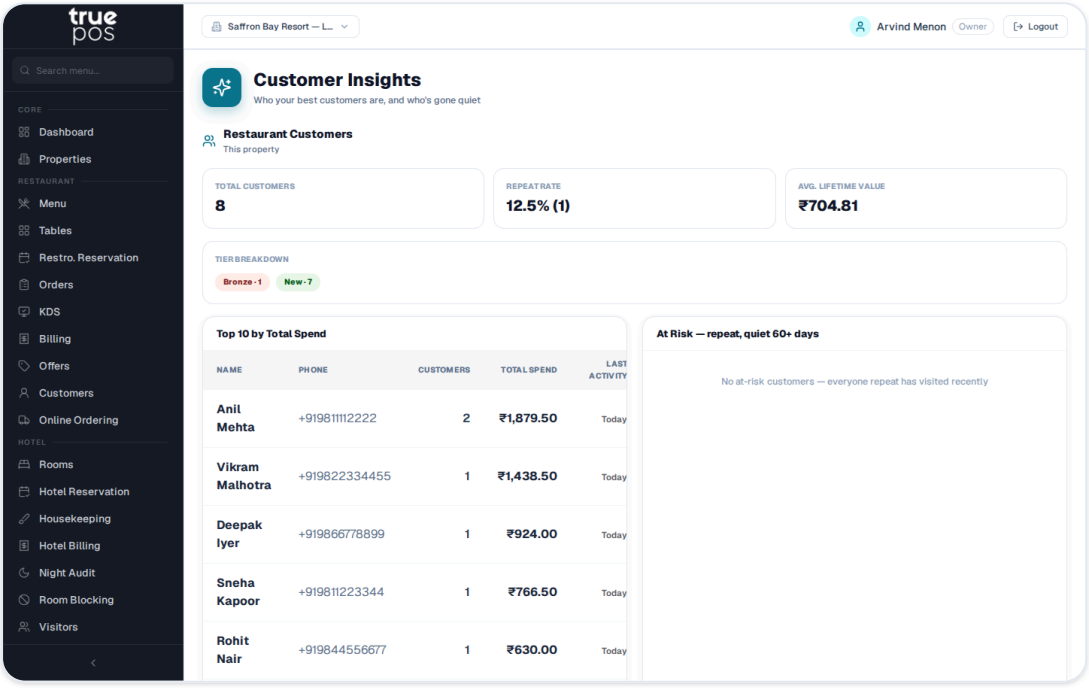
- **Top Menu Items**: your best-selling dishes
- **Category Performance**: how each menu category is doing

Use it to plan your menu: promote what sells, and rethink what doesn't.

Customer Insights

One view of your restaurant customers (this property) and hotel guests (across all your properties):

Figure	Meaning
Tier Breakdown	How many customers are in each loyalty tier: **New**, **Bronze**, **Silver**, **Gold** or **Platinum**
Repeat rate	The share of customers who have come back more than once
Lifetime value	Average total spending per customer
Top 10 by spend	Your most valuable customers
At Risk	Repeat customers who haven't visited for **60+ days**, worth winning back



Customer Insights

> **Tip:** The **At Risk** list and the loyalty tiers can be targeted directly with a promotional campaign. See *Marketing & Notifications*.

Shared Add-on

Marketing & Notifications

Send targeted SMS, email or WhatsApp campaigns to customer segments, and control the automatic messages guests and staff receive.

For: Owners, Marketing, Managers

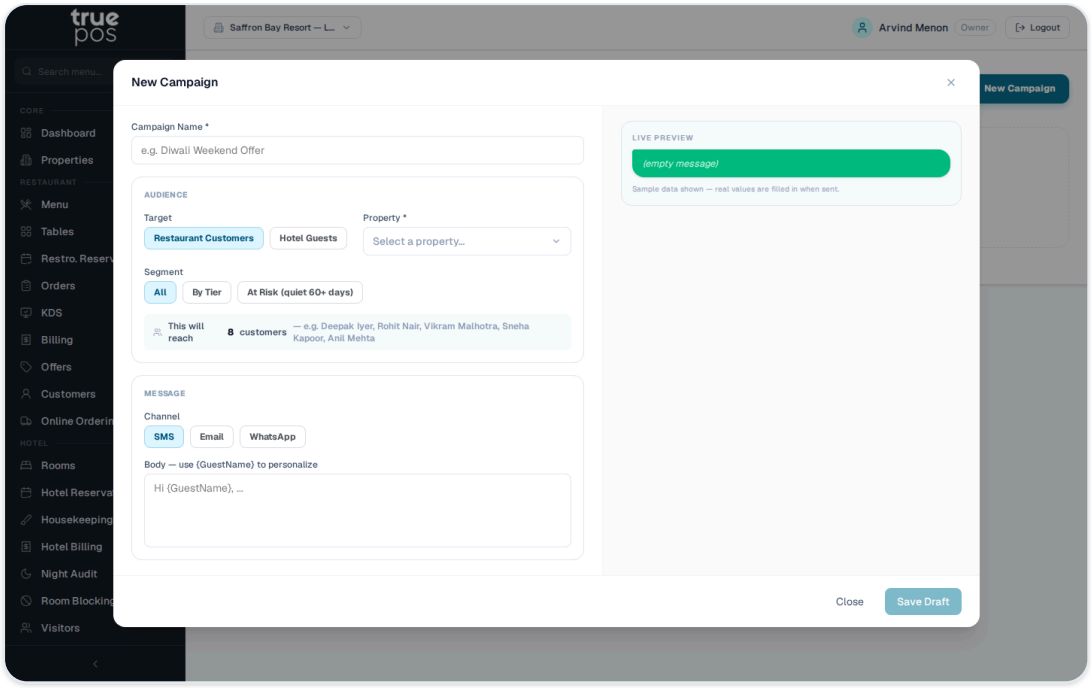
Promotional campaigns · Add-on

Go to **Campaigns** to see your campaigns, how many people each was sent to, and how many messages were **Sent** and **Failed**.

Creating a campaign

1. Click **New Campaign**, and give it a **Campaign Name *** (for example *Diwali Weekend Offer*).
2. **Audience:** choose who to **Target** (**Restaurant Customers** or **Hotel Guests**) and the **Property ***. Then pick a **Segment**:
   - **All**: everyone in that audience
   - **By Tier**: one or more loyalty tiers, for example Gold and Platinum
   - **At Risk (quiet 60+ days)**: repeat customers who haven't been back for a while.

   The screen shows how many people **This will reach**.
3. **Message:** choose the **Channel**: SMS, Email or WhatsApp.
   - For **SMS** and **Email**, write the message (and, for email, a **Subject**). Placeholders such as `{GuestName}` are replaced with each person's details.
   - For **WhatsApp**, choose an approved **Template ***. WhatsApp only allows pre-approved wording, so a read-only reference copy is shown.
4. Click **Save Draft** at any time.



Creating a campaign

Testing and sending

1. Enter your own **Email address** or **Phone number** and click **Send Test**. **A test must be sent before the campaign can go out**, so you always see exactly what customers will receive.
2. Then either:
    - click **Send Now**, or
    - set a date and time under **Schedule for later** and click **Schedule**. The campaign goes out automatically at that time.

> **Note:** Customers and guests marked **Do not contact for promotions** are **always excluded** from campaigns, whatever segment you choose.

Automatic notifications

truePOS sends some messages automatically, for example:

- a **reservation confirmation** to the guest
- a **reminder before an upcoming booking** (WhatsApp)
- **low-stock** and **batch-expiry** alerts to your team.

Go to **Settings → Notifications** to see each event, the channels it uses, and whether it's **Enabled** or **Disabled**.

Customising a message

1. Click **Edit** on an event's SMS or email message.
2. Change the wording. Drag a **placeholder** chip, such as the guest's name or booking date, into the message, or click it to insert it at the cursor.
3. Click **Save**. The message is marked **Customized**.

Click **Reset to Default** to go back to the standard wording, or switch a message off entirely.

> **Note:** WhatsApp messages can only be switched **on or off**, not reworded, because WhatsApp requires message templates to be approved in advance.

Shared

Users & Security

Control who can see and do what with roles and permissions, group staff, assign access per property, and review every change in the audit log.

For: Owners

How access works

What a staff member sees is decided by three things:

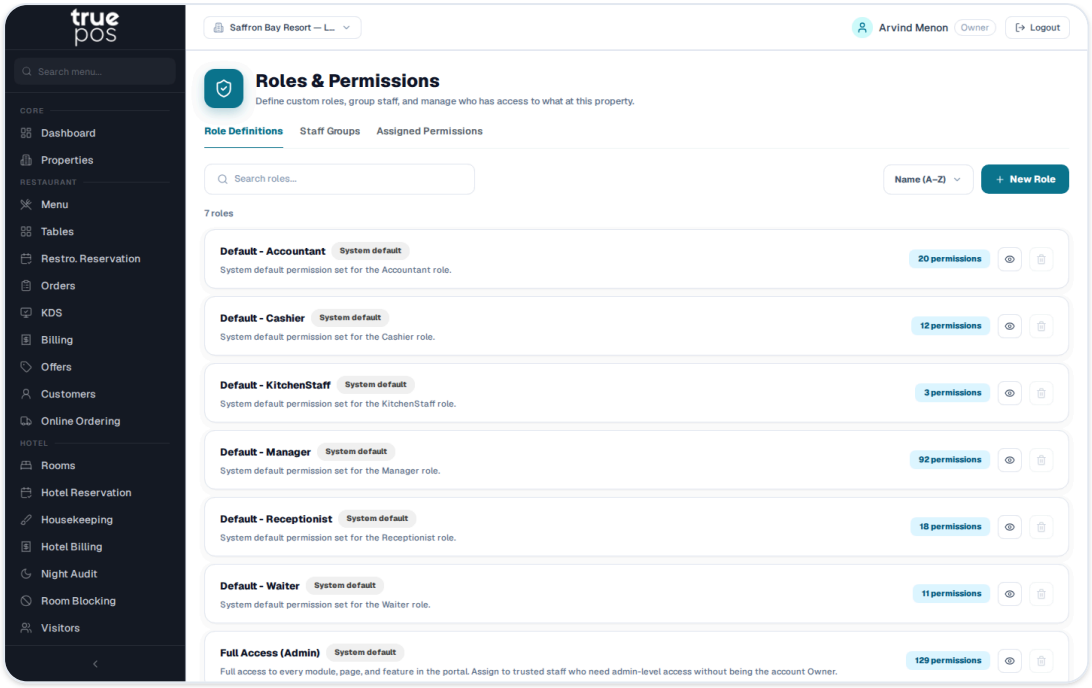
1. **The modules in your plan**: a screen for a module you don't have never appears.
2. **The properties they're assigned to**: staff work only in their own properties (see *Staff, Shifts & Payroll*).
3. **Their role's permissions**, for example *can void a bill* or *can approve a purchase order*.

The **Owner** always has full access. **Roles & Permissions** (the **RBAC** menu) is available to the owner only.

Roles

Go to **RBAC**. The **Role Definitions** tab lists every role.

- **Ready-made roles** (*Default - Manager*, *Default - Cashier*, *Default - Waiter*, *Default - KitchenStaff*, *Default - Receptionist* and *Default - Accountant*) are created for you, and marked **System default**. They can't be edited or deleted. Click **View permissions** to see what each includes, and see the *Appendix* for a summary.
- **Full Access (Admin)** is a preset with every permission. Give it to a trusted manager who needs admin-level access without being the owner.



Roles & Permissions

Creating a custom role

When a ready-made role doesn't fit, for example a *Shift Lead* who needs a cashier's access plus the ability to void bills:

1. Click **New Role**.
2. Enter the **Role Name *** and a **Description**.
3. Optionally set a **PO Approval Limit (₹)**: the largest purchase order this role can approve. Leave it empty for unlimited.
4. Under **Permissions**, tick what the role can do. Use **Search all permissions...** to find one quickly, or **Select all** / **Clear all**.
5. Click **Save Role**.

> **Note:** A few permissions are labelled **Not yet enforced**. They are reserved for upcoming features and have no effect today.

Staff groups

Groups save time when many people need the same access, for example *All Waiters*. On the **Staff Groups** tab, click **New Group**, name it, then **Add member** for each person. Roles given to a group apply to everyone in it.

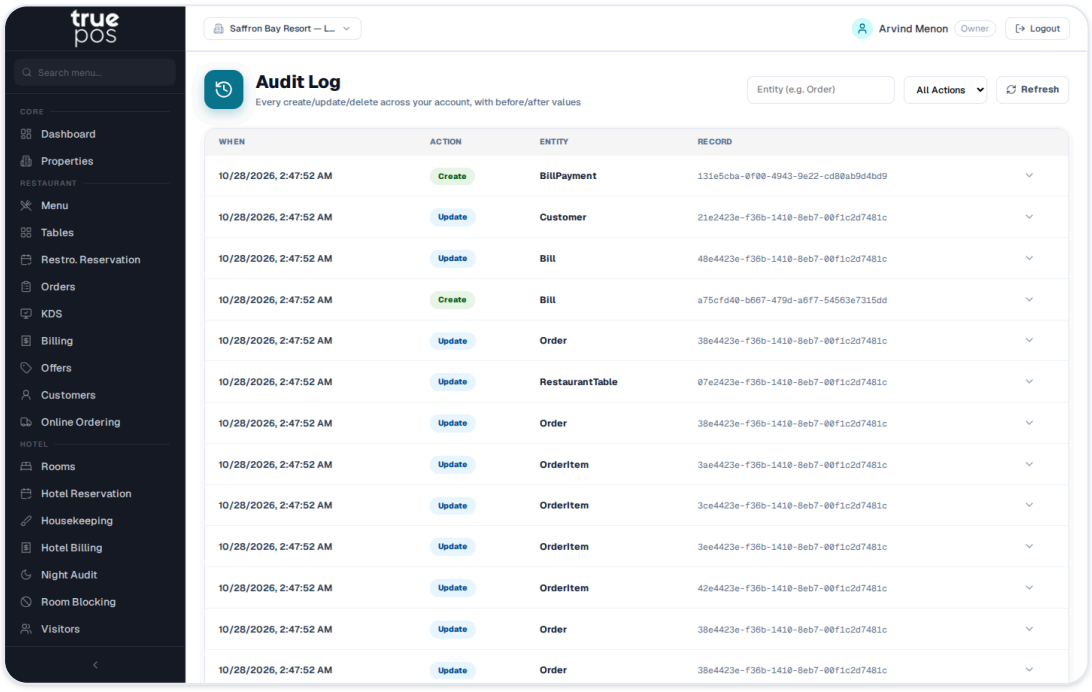
Assigning a role

1. On the **Assigned Permissions** tab, click **Assign Permission**.
2. Under **Assign to**, choose **Individual Staff** or **Staff Group**, and pick the person or group.
3. Choose the **Role to assign**.
4. For an individual, **Keep default role active** (ticked by default) adds this role on top of their ready-made role. Untick it to switch their ready-made role off at this property, so their access comes **only** from the role you're assigning.
5. Click **Assign Role**.

Assignments are made for the property selected at the top of the screen (*Assigning at:*). The **Assigned Permissions** tab lists who has which role there. Remove an assignment to take the access away.

Audit log

Go to **Audit Log** to see **every create, update and delete** across your account: who did it, when, and the before and after values of each field. Filter by **Entity** (for example *Order*) and by action (**Create**, **Update** or **Delete**), and click an entry to see exactly what changed.



Audit log

> **Tip:** Use the audit log to answer questions like *who changed this price?* or *who voided that bill?*

Good security habits

- Give every staff member their **own login**. Never share passwords at the counter.
- Give each person the **smallest role** that lets them do their job.
- **Deactivate** staff the day they leave.
- Always **Logout** on shared computers.

Shared

Settings

Per-property settings for currency and GST, QR self-ordering, online payments (Razorpay), receipts and UPI QR, hotel invoices, the kitchen display and module access.

For: Owners, Managers

Go to **Settings**. Each settings page applies to the **property selected** at the top of the screen, except **Profile**, which is your own account.

Property

Setting	What it does
Operating Currency	The currency all of this property's transactions are recorded in
Default GST Rate	Applied to restaurant bills, folio charges and orders, unless a different rate is chosen on an item or charge
Allow Self-Ordering	Lets customers place orders directly from the table or room QR menu
Auto-Reorder	Creates draft purchase requisitions automatically when an ingredient falls to its reorder point (see *Inventory & Procurement*)

Payment Gateway

Connect **Razorpay** so customers can pay online from the QR menu.

1. From your Razorpay dashboard, copy your **Razorpay Key ID (public)** (for example `rzp_live_...`) and **Razorpay Key Secret**.
2. Paste them in, along with the **Webhook Secret (optional)**, and click **Save Gateway**.

The screen then shows **Razorpay Connected**. Your keys are stored encrypted and are never shown again after saving. Use **Update Keys** to change them, or **Remove** to disconnect. Until a gateway is connected, customers can't pay online.

Receipt & Printing

Choose what appears on customer receipts for this property:

- **Show GST Number on Receipt**: prints the property's GSTIN in the header.
- **Show Logo on Receipt**: click **Upload Logo**. One shared logo prints on receipts for all your properties.
- **Custom Receipt Message**: a line at the bottom of every receipt (up to 200 characters), for example *Thank you for dining with us!*

UPI QR code on bills

Let guests pay by scanning a UPI QR printed on the bill:

Option	How it works
Static QR	Upload your existing UPI QR image (**Upload QR Image**, then **Activate Static QR**). The customer types in the amount.
Dynamic QR	Enter your **UPI VPA** (for example `restaurant@okhdfcbank`) and an optional **Payee Name**, then click **Save & Activate Dynamic QR**. A fresh QR with the **exact bill amount already filled in** is printed on each bill.

Invoice Settings · Hotel

Design this property's hotel GST invoice:

1. Under **Invoice Sections**, drag sections to reorder them, and use the toggles to show or hide each one. The **Invoice preview** updates as you go.
2. Add **Custom Footer Text** (up to 500 characters), **Terms & Conditions** (up to 2000 characters) and **Bank Details** (bank name, account number and IFSC code). Each prints only when its section is visible.
3. Set the **Invoice Number Prefix**, for example *INV*.
4. Click **Save Invoice Settings**.

The printed invoice and the one sent on WhatsApp always use these same settings.

Notifications

Customise or switch off the automatic SMS, email and WhatsApp messages. See *Marketing & Notifications*.

Kitchen Display (KDS)

Choose the **Alert sound for new orders**: Bell, Chime, Ping, Beep or None. Click **Preview** to hear it. This setting is saved on each device, so every kitchen tablet can have its own sound.

Modules · Owner only

Shows every module in your subscription for this property, each **Enabled** or **Disabled**. Switching a module off for a property hides it from that property's menu and blocks it there. Your subscription itself doesn't change. All modules in your subscription start **enabled**.

> **Tip:** Use this when, for example, one outlet doesn't run a kitchen display. Disable KDS there, and staff at that outlet won't see it.

Profile

Your name, email, organisation and role, plus the **Reporting Currency** used for combined reports across properties. See *Getting Started*. To change your email or password, contact your administrator.

Shared

Appendix — Roles, Modules & FAQ

What each ready-made role can do, which module powers each screen, and answers to common questions.

For: Owners, Managers

A. What the ready-made roles can do

Every new account comes with these roles. To give someone a different mix of permissions, create a custom role (see *Users & Security*).

Role	Typical person	Can do
Owner	Business owner	Everything, in every property
Full Access (Admin)	Trusted general manager	Everything the owner can, as an assignable role
Manager	Outlet or hotel manager	Day-to-day operations of both restaurant and hotel: menu, tables, orders, discounts, KDS, billing (including voids), offers, reservations, rooms, check-in/out, housekeeping (including inspections), hotel billing, City Ledger, Night Audit, Guest CRM, inventory, purchasing (including PO approval), requisitions, shifts, payroll, property settings, and reports (including Customer Insights)
Accountant	Accountant or finance staff	Payroll processing and salary advances, City Ledger invoicing and payments, and read-only access to bills, folios, stock, purchasing, and the revenue, occupancy, P&L and Customer Insights reports
Cashier	Billing counter	Take orders, generate bills and record payments, view offers, update table status, manage customers, and record City Ledger payments
Waiter	Floor staff	Take and update orders, update table status, manage table reservations and customers, and generate bills
Kitchen Staff	Chefs and cooks	View orders and use the Kitchen Display (mark items ready)
Receptionist	Front desk	Hotel reservations, check-in/out, room changes and cancellations, room status, posting folio charges, the visitor register, Guest CRM, and viewing housekeeping, room blocks and the night-audit history

Note: Finance & Accounting, **Campaigns** and the **Audit Log** aren't part of any ready-made staff role. They're available to the owner, the Full Access preset, or a custom role that includes them.

B. Modules and the screens they unlock

Module	Screens	Area
Platform Administration	Dashboard, Properties, RBAC, Settings, Audit Log	All businesses
Table Management	Menu, Tables, Restro. Reservation	Restaurant
Order Management (POS)	Orders, Customers, Online Ordering, Room Service orders	Restaurant
Billing & Invoicing	Billing	Restaurant
Offers & Coupons	Offers	Restaurant & Hotel
Kitchen Display System	KDS	Restaurant
Room Management	Rooms, room types and rate calendar	Hotel
Front Desk	Hotel Reservation, Night Audit, Room Blocking, Visitors, City Ledger	Hotel
Hotel Billing & Invoicing	Hotel Billing (folios)	Hotel
Housekeeping	Housekeeping	Hotel
Guest CRM	Guest CRM	Hotel
Inventory Management	Inventory, Procurement, Requisitions	Operations
Staff Management	Staff	Operations
Attendance & Payroll	Shifts, Attendance, Payroll, My Leave	Operations
Finance & Accounting	Chart of Accounts, Journals, Expenses, Periods, statements, GST Return, Import, Bank Reconciliation	Operations
Revenue Analytics	Occupancy, Revenue, P&L, Food Sales Analytics, Customer Insights	Reports

Module	Screens	Area
Promotional Campaigns	Campaigns	Marketing

Which modules are included depends on your plan, and further modules can be added at any time. Ask your truePOS partner for the options that suit your business.

C. Frequently asked questions

A screen described in this manual doesn't appear for me. Either your plan doesn't include that module, the module is switched off for your property (**Settings** → **Modules**), or your role doesn't include it. Ask your account owner.

I see "Select a property…" instead of any data. Choose a property in the **property switcher** at the top left.

A property shows "Inactive" and I can't select it. It has no active subscription. Contact your truePOS partner to activate it.

I forgot my password. Click **Forgot password?** on the sign-in screen. See *Getting Started*.

The KOT or receipt doesn't print. Printing opens a small print window. If your browser shows *Popup blocked*, allow pop-ups for the portal, then print again.

The WhatsApp button on a bill is greyed out. The customer has no phone number on file. Add it to their customer record.

Do I need to install anything? No. truePOS runs in any modern web browser (Chrome, Edge, Safari or Firefox) on a computer, tablet or phone.

Can I see all my outlets together? Yes. Choose **All properties** in the property switcher for combined figures on the dashboard, and use **All Properties** in the finance reports.

Can a staff member work at two of my outlets? Yes. Assign them to each property from **Staff**.

Who can see Finance, Campaigns or the Audit Log? The owner, and anyone given the **Full Access** preset or a custom role that includes them. See section A above.