



SALES & INVOICING SOFTWARE

From the order to the money in the bank.

Clients, catalogue, sales orders, part-invoicing, returns, receipts, advances and subscription renewals — fifty-six screens and thirty-three reports, all built on one client record.

Clients

Orders

Invoices

Payments

Subscriptions

Sysfo Sales & Invoicing — Manage Orders

Sales And Invoicing / Sales Order / Manage Orders

Search forms & pages... Ctrl+K

SA Anita Rao (Sysfo Software S SuperAdmin)

Sysfo

Sales And Invoicing... Workspace

Dashboard

Masters

Client

Product/Service

Sales Order

New Sales Order

Manage Orders

Invoices

Subscriptions

Client Payments

Reports

Version 1.0.0

Manage Orders

Browse, search and manage records.

TOTAL ORDERS 3 Active: 3 - Cancelled: 0

ORDER VALUE ₹48,757.36

BILLED AMOUNT ₹0.00 To bill: ₹48,757.36

PAYMENT RECEIVED ₹48,757.36

13/Oct/2025 - 13/Oct/2026 All Status All Sources Clear All Fields Enter Criteria...

PDF EXCEL

15 / page

#	ORDER #	DATE	EXPIRY DATE	CLIENT	ORDER TOTAL (₹)	BILLED AMOUNT (₹)	BALANCE TO BILL (₹)	PAYMENT AMOUNT (₹)	BALANCE PAY
1	SO-00039	16-Sep-2026	16-Sep-2027	NORTHWIND TRADERS	₹ 44,734.27	—	₹44,734.27	₹44,734.27	₹0.00
2	SO-00038	15-Sep-2026	15-Oct-2026	NORTHWIND TRADERS	₹ 1,768.82	—	₹1,768.82	₹1,768.82	₹0.00
3	SO-00037	15-Sep-2026	15-Sep-2027	NORTHWIND TRADERS	₹ 2,254.27	—	₹2,254.27	₹2,254.27	₹0.00
Total					₹ 48,757.36	₹ 0.00	₹ 48,757.36	₹ 48,757.36	₹ 0.00

15 / page 1-3 of 3 records

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WHY SYSFO SALES & INVOICING

The order is typed once. Everything after it is derived.

Most billing problems are copying problems — an item missed between the order and the invoice, a discount applied before tax instead of after, a receipt nobody matched to a bill. Here the invoice is generated from the order, and the receipt against the invoice, so the three can never disagree.

56

screens in the module

33

sales, invoice & receivable reports

∞

part-invoices against one order

3

alert channels: Email, SMS & WhatsApp



Bill in parts

Few jobs are billed in one go. Raise as many invoices against an order as the work needs — ordered, billed and remaining stay straight per line.



Collect in parts

Receive against one invoice or several, in part or in full, in any mode — with advances taken on the order and adjusted later.



GST that behaves

HSN / SAC per line, discount apportioned onto the lines so tax falls with it, TDS on receipt, and a tax summary for each.

THE CHAIN

Six steps, no re-typing.

Client

One record with GSTIN, addresses and terms.



Order

Items, discount and tax; advance if taken.



Invoice

Part or full, against that order.



Receipt

Against one bill or many.



Renewal

Subscription lines come round again.

Where billing usually leaks

Work delivered but never invoiced, because the order was closed in somebody's head. Payments received but never matched, so a client is chased for money they already sent. Renewals that lapse quietly. None of these are accounting errors — they are tracking ones.

What closes the gaps

Billed against ordered on every line, receipts attached to bills, and a dated list of what is expiring. The month-end question becomes "approve this" rather than "reconstruct this".

CLIENTS & CATALOGUE

One client record the whole business shares.

The client you invoice is the same record that raises support tickets, holds subscriptions and signs into the Client Panel — so a client's history is one page, not four systems.

Client Summary

Acme Industries Pvt Ltd

12 Orders	₹8.4L Ordered	₹7.3L Billed	₹1.04L Outstanding
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GS

09AABCA1234K1Z5

Billing and shipping addresses · credit 30 days

Verified

KY

KYC documents

PAN, GST certificate, signed MSA

3 on file

CP

Client Panel login

accounts@acme-industries.example · issued 04-Apr-2026

Active

SB

2 live subscriptions

AMC to 31-Oct-2027 · hosting to 14-Jan-2027

1 expiring

Clients

- **Add client** with billing and shipping addresses, GSTIN and PAN.
- **KYC documents** held against the client, from a document master.
- **Client Summary** — orders, bills, receipts, tickets and subscriptions on one page.
- **Client Panel login** issued from the same screen.

Products & services

- **Categories, brands and units** as masters.
- Goods or services, with **HSN / SAC** and tax rate.
- **Variation attributes** — size, colour, capacity — on one product.
- Price, discount and discount type per product.

SOLD ONCE, USED EVERYWHERE

The same catalogue serves the counter and the storefront.

If the E-Commerce module is switched on, the storefront sells from these products at these prices with these discounts, and a web order arrives here as a sales order tagged **Web** — so online and offline add up to one sales figure.



Goods or services

Both live in one catalogue with their own HSN or SAC and tax rate, so a bill that mixes hardware and labour is still correct.



Variations

Size, colour or capacity are attributes of one product rather than a dozen near-duplicate records nobody can keep priced.



Discount that behaves

A discount is apportioned onto the lines, so GST falls with it — rather than being deducted after tax and quietly misstating the return.

ORDERS & INVOICING

Ordered, billed, remaining — three numbers, always right.

Generate Invoice works against the order, line by line. It knows what has already been billed, so the second invoice offers only what is left.

Generate Invoice

Browse, search and manage records.

13/Oct/2025 - 13/Oct/2026 All Orders Clear All Fields Enter Criteria... Search

15 / page PDF EXCEL CSV PRINT

#	ORDER #	DATE	CLIENT	ORDER TOTAL (₹)	BILLED AMOUNT (₹)	BALANCE TO BILL (₹)	AMOUNT PAID (₹)	CURRENCY	BILLING	ACTIONS
1	SO-00039	16-Sep-2026	NORTHWIND TRADERS	₹ 44,734.27	₹ 0.00	₹ 44,734.27	₹ 44,734.27	—	Not Invoiced	Generate
2	SO-00038	15-Sep-2026	NORTHWIND TRADERS	₹ 1,768.82	₹ 0.00	₹ 1,768.82	₹ 1,768.82	—	Not Invoiced	Generate
3	SO-00037	15-Sep-2026	NORTHWIND TRADERS	₹ 2,254.27	₹ 0.00	₹ 2,254.27	₹ 2,254.27	—	Not Invoiced	Generate
Total				₹ 48,757.36	₹ 0.00	₹ 48,757.36	₹ 48,757.36			

15 / page 1-3 of 3 records

Generate Invoice — raised against the order, so it already knows what is left to bill.

Orders

- New sales order, manage orders
- Numbering per financial year
- Offline, web and mobile-app orders together
- Confirm, cancel and track status
- Pending orders and status summary

Invoices

- Generate invoice — part or full
- Manage bills
- Invoice templates with your branding
- Billed vs ordered report
- FY invoice summary

Returns

- Sales return against an invoice
- Credit note raised automatically
- Stock added back on confirm
- Return register, return by product
- Net sales after returns

YOUR CLIENT IS TOLD

The invoice arrives without anyone remembering to send it.

Order confirmations, invoices, receipts and renewal notices go out by Email, SMS and WhatsApp from templates you control, with the PDF attached.

Dear **Acme Industries**, we have received **₹1,34,520.00** against invoice **INV-2026-0188** on 05-Nov-2026. Receipt attached. — Sysfo Software Solutions

4:12 PM ✓✓

PAYMENTS & RECEIVABLES

Know who owes you, how much, and for how long.

Receipts attach to bills, advances sit against orders until adjusted, and every unpaid rupee lands in an ageing bucket you can open.

Receivables Ageing						as on 12-Oct-2026 · sample data
01-Apr-2026 – 12-Oct-2026		All clients	All salespeople	Manage columns		Export
CLIENT	NOT DUE	0-30	31-60	61-90	90+	TOTAL
Acme Industries Pvt Ltd	1,04,548	—	—	—	—	1,04,548
Northwind Traders	—	62,300	18,900	—	—	81,200
Zenith Retail LLP	—	—	—	44,100	27,600	71,700
Harbour Logistics	36,000	12,400	—	—	—	48,400
4 clients	1,40,548	74,700	18,900	44,100	27,600	₹3,05,848

Every bucket opens into the invoices behind it; the totals are of what you filtered.

Taking money

- **Client payment** against one invoice or several, part or full.
- **Client advance payment** on an order, adjusted when billed.
- **Online payments** through the gateway, recorded automatically.
- **TDS deducted** captured on the receipt and reported separately.

Watching it

- **Outstanding invoices** and **receivables ageing**.
- **Client ledger** — bills, receipts, advances and credit notes in order.
- **Payment collection**, by mode and bank-wise.
- **Advance payments** still unadjusted.

COLLECTIONS

Chasing is easier when the list is already written.

Due

Outstanding invoices, oldest first.



Aged

Bucketed 0-30 through 90+, per client.



Reminded

Email, SMS and WhatsApp from your templates.



Received

Matched to the bill, in part or in full.



Reconciled

Client ledger agrees with the client.

SUBSCRIPTIONS & RENEWALS

Recurring revenue that chases itself.

An order line can carry a period — an AMC, a licence, a hosting plan, a domain. From then on the system knows when it ends, warns you before it does, and raises the next order in one step.

Expiring Subscriptions					next 60 days · sample data
CLIENT	SUBSCRIPTION	STARTED	ENDS	VALUE	STATUS
Zenith Retail LLP	Website hosting — business	15-Jan-2026	14-Jan-2027	18,000	62 days
Northwind Traders	Annual Maintenance Contract	01-Dec-2025	30-Nov-2026	96,000	48 days
Harbour Logistics	Domain — harbourlogistics.in	22-Nov-2025	21-Nov-2026	1,180	39 days
3 of 14 expiring	Renew Subscription raises the next order with the same lines			₹1,15,180	

A renewal is a new sales order carrying the subscription forward — so it bills, collects and reports like any other sale.

Sell

- A period on the order line
- Any product: AMC, licence, hosting, domain
- Priced like any other line

Watch

- Manage subscriptions — what is live
- Expiring subscriptions — what falls due
- Expiring product / services report

Renew

- Renew Subscription raises the next order
- Client sees it in the Client Panel
- Reminders by Email, SMS and WhatsApp

WHY IT MATTERS

The renewal you forget is the one that does not get paid.

Lapsed AMCs and silently expired hosting are revenue that was already won. A dated list and an automatic reminder turn that from a memory problem into a screen somebody clears each week.

The client sees it too

If the Client Panel is switched on, the client sees their own subscriptions and renewal dates alongside their orders and invoices — so a renewal is rarely a surprise to either side.

It bills like anything else

A renewal is an ordinary sales order, so it invoices in parts, collects against the bill, and appears in the sales reports beside new business — rather than living in a separate spreadsheet of recurring accounts.

REPORTING

Thirty-three reports, and all fifty-six screens.

Each one filters by date and what matters to it, searches across the columns on screen, lets you pick your columns and exports.

Sales

- Sales Register
- Sales by Client / Salesperson
- Item-wise Sales
- Sales by Category
- Sales by Month / Year
- Sales Trend
- Pending Orders
- Order Status Summary

Invoices & tax

- Invoice Register
- Invoice by Client
- Invoice by Month / Year
- Billed vs Ordered
- FY Invoice Summary
- HSN / SAC Summary
- Tax Collection

Money & analysis

- Receivables Ageing
- Outstanding Invoices
- Client Ledger
- Payment Collection / by Mode
- Bank-wise Collection
- Advance Payments, TDS Deducted
- Top Selling Products
- Discount Analysis

EVERY SCREEN IN THE MODULE

All fifty-six, by name.

- Add Client
- Manage Client
- Client Summary
- Add Product
- Manage Products
- Manage Categories
- Brand Master
- Unit Master
- Variation Attributes
- New Sales Order
- Manage Orders
- Generate Invoice
- Manage Bills
- Sales Return
- Manage Sales Returns
- Client Payment
- Manage Client Payments
- Client Advance Payment
- Manage Client Advance
- Online Payments
- Renew Subscription
- Manage Subscriptions
- Expiring Subscriptions
- Sales Register
- Sales by Client
- Sales by Salesperson
- Item-wise Sales
- Sales by Category
- Sales by Month
- Sales by Year
- Sales Trend
- Pending Orders
- Order Status Summary
- Expiring Product/Services
- Invoice Register
- Invoice by Client
- Invoice by Month
- Invoice by Year
- Billed vs Ordered
- FY Invoice Summary
- HSN / SAC Summary
- Tax Collection
- Payment Collection
- Payment by Mode
- Bank-wise Collection
- Receivables Aging
- Outstanding Invoices
- Client Ledger
- Advance Payments
- TDS Deducted
- Sales Return Register
- Return by Product
- Net Sales
- Top Selling Products
- Discount Analysis
- Client Business Summary

GET STARTED

See it billing your own work.

We set up your financial year, tax rates, numbering and invoice template, bring your clients, products and opening balances across, and train the people who raise orders and collect money.

1

Live demo

Order to invoice to receipt, on the kind of work you actually sell.

2

Setup & data

Taxes, numbering, templates, and your clients, products and outstanding balances.

3

Training & go-live

Sales, billing and collections, with support through your first month-end.

COMPANY

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- ✓ One client record the whole business shares
- ✓ Receipts against one bill or many
- ✓ Sales returns that add the stock back
- ✓ Receivables ageing and a client ledger
- ✓ Part-invoicing with ordered / billed / remaining
- ✓ GST with HSN / SAC, and TDS on receipts
- ✓ Subscription renewals that remind you
- ✓ 56 ready screens and 33 reports