Biz Analyst
By Khatabook

Grow your Business with Technology

Set goals for your business and achieve it with Biz Analyst

Use Biz Analyst to:

- ✔ Grow your Sales by: **30%**
- ✔ Reduce your Inventory by: **15%**
- ✔ Reduce your Outstanding by: **50%**

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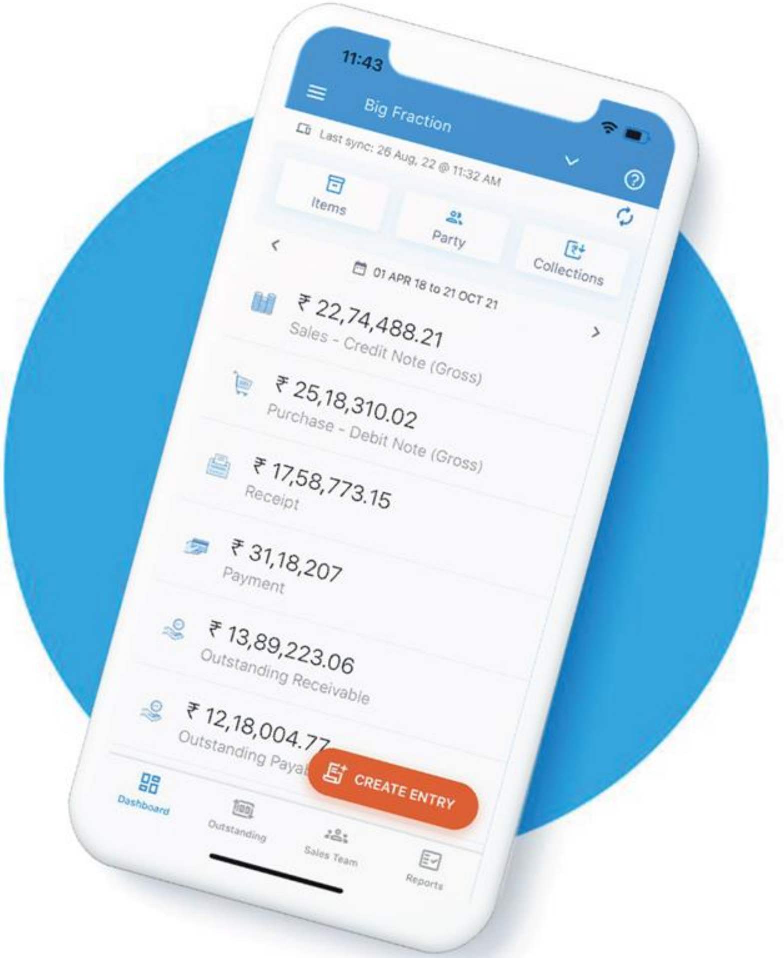

Offline Access

Stay connected with your business

- ✔ Work from anywhere, anytime on your phone even when Tally is offline
- ✔ 24/7 access to your business data ensures better growth, productivity and profit

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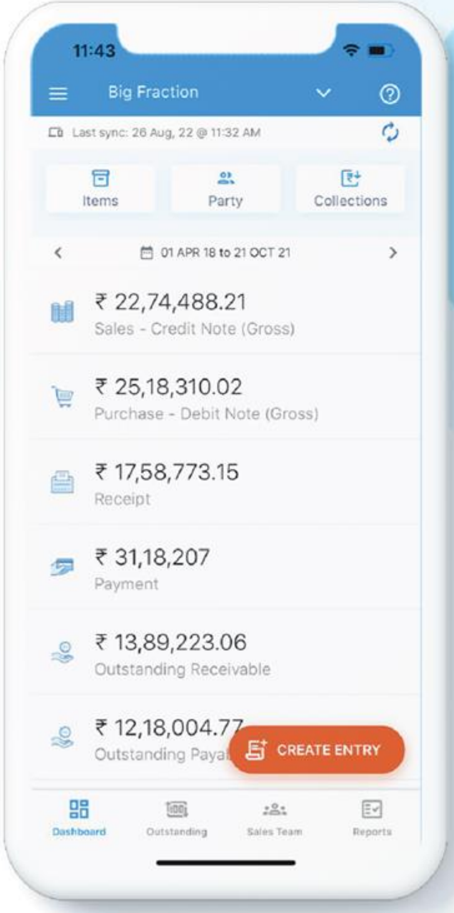
Dashboard

Get all your key business figures on a single screen

- ✔ Access all your important data with a few clicks
- ✔ Reduce dependency on your team



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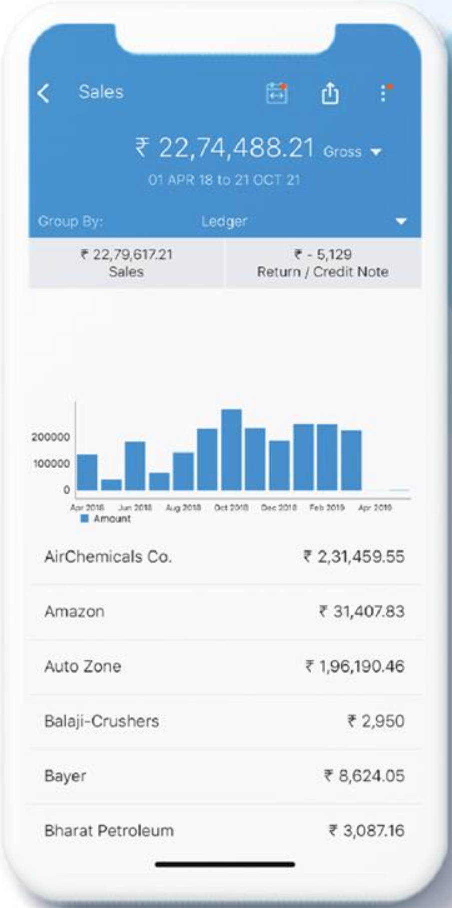
Sales Analysis

Analyse your sales data and plan sales strategies using the various sales reports

Steps:

- ✔ Go to Dashboard > Sales
- ✔ Filter by Gross and net sales and view various reports

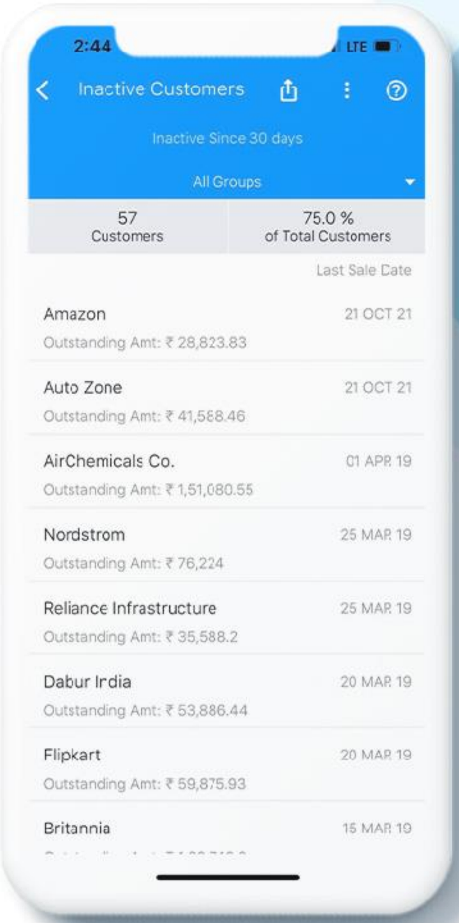


Inactive Customers

View your list of inactive customers and try to regain their business

Steps:

- ✔ Reports > Inactive Customers
- ✔ Filter this list by days or customize the number of days

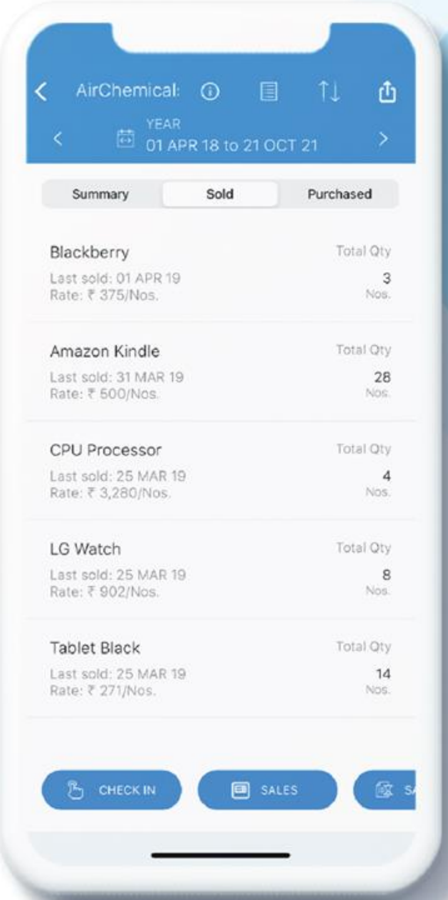


Items Sold to Customer

Know your customer's preferences,
get repeat order on all items

Steps:

- ✔ Go to Party > Party Name > Items Sold
- ✔ Use this data to improve your sales strategies to get more business from them



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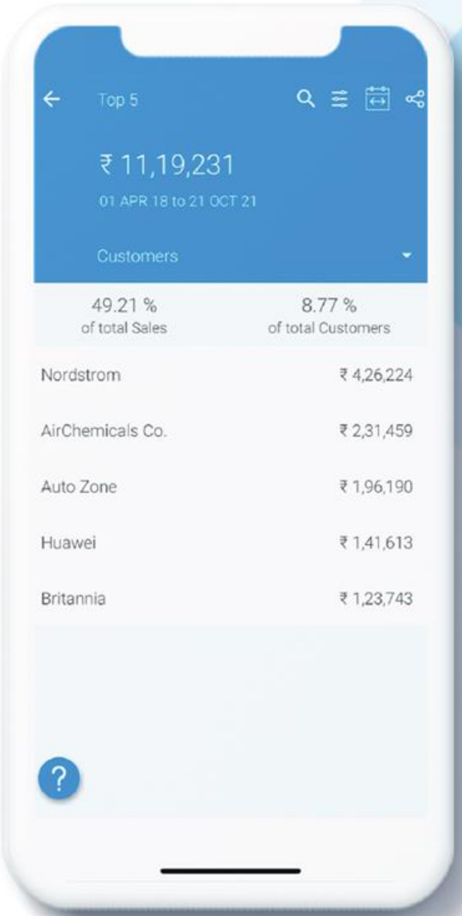
Top Report

Find out who your top customers are and get more sales from them

Steps:

- ✔ Go to Reports > Top Report
- ✔ Filter your top customers and view your total no of sale from them

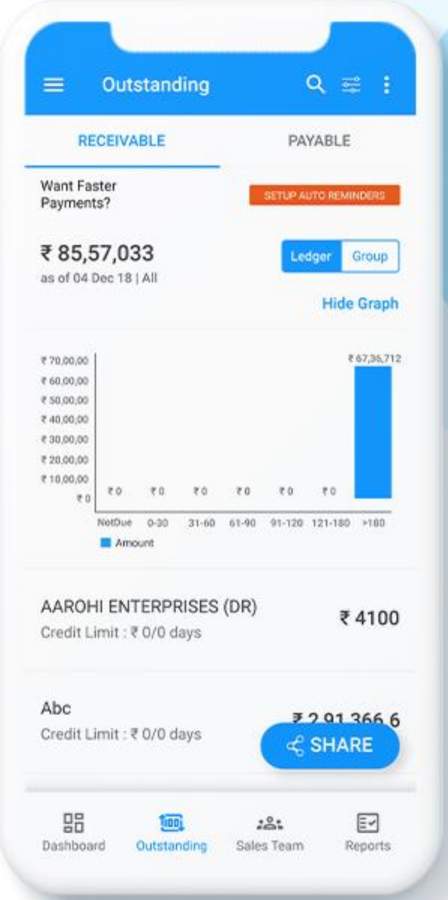


Outstanding Reminder

Avoid delayed payment by sending outstanding reminders to customers

Steps:

- ✔ Go to Dashboard > Outstanding Receivable
- ✔ Select the customer to send the outstanding reminder



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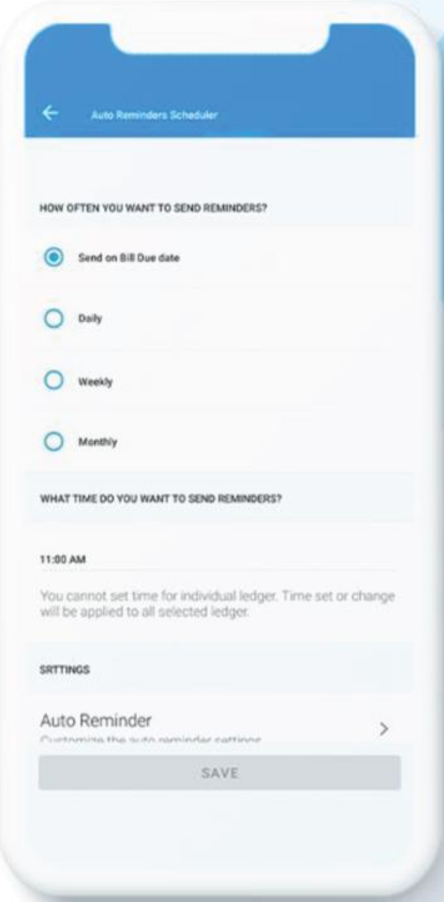
Automatic Outstanding Reminder

Reduce manual efforts & work smartly

Steps:

- ✔ Go to Menu > Settings > Enable Auto Reminder
- ✔ Set reminders for daily, weekly, monthly, or when the bill is due as per your preference and set a custom reminder schedule for each customer

*Currently available FREE ON BETA mode and on-demand



Multiple Outstanding Reminder

Get paid on time by sending outstanding reminder to multiple customers at once

Steps:

- ✔ Go to Dashboard > Outstanding Receivable
- ✔ Click on share & send reminders to customers whose email is configured in your tally

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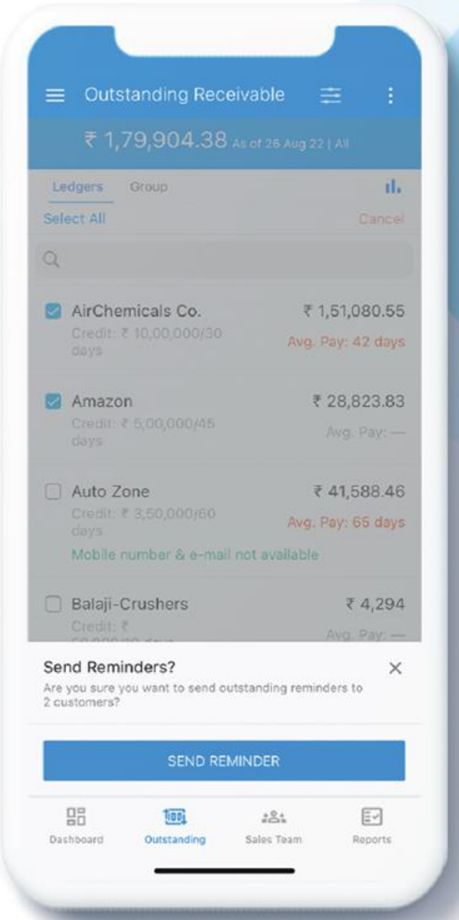
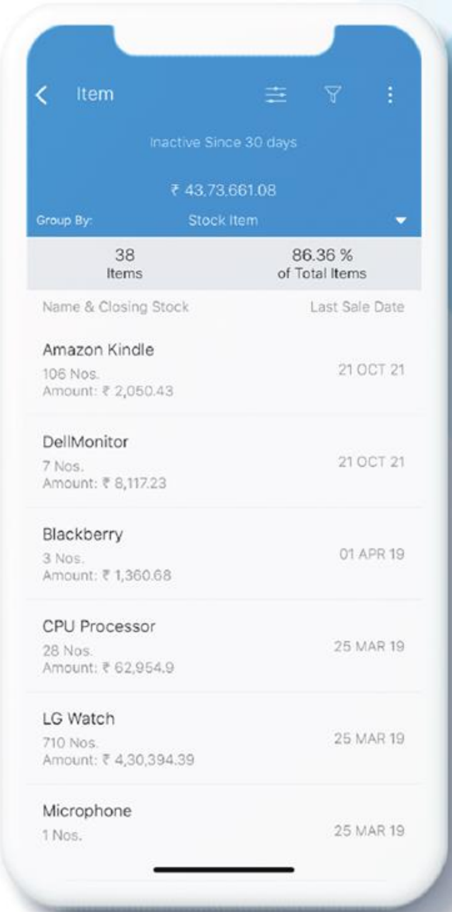


Inactive Items

Reduce your dead stock and improve your cash flow

Steps:

- ✔ Go to Reports > Inactive Items
- ✔ Filter this list by days or customize the number of days

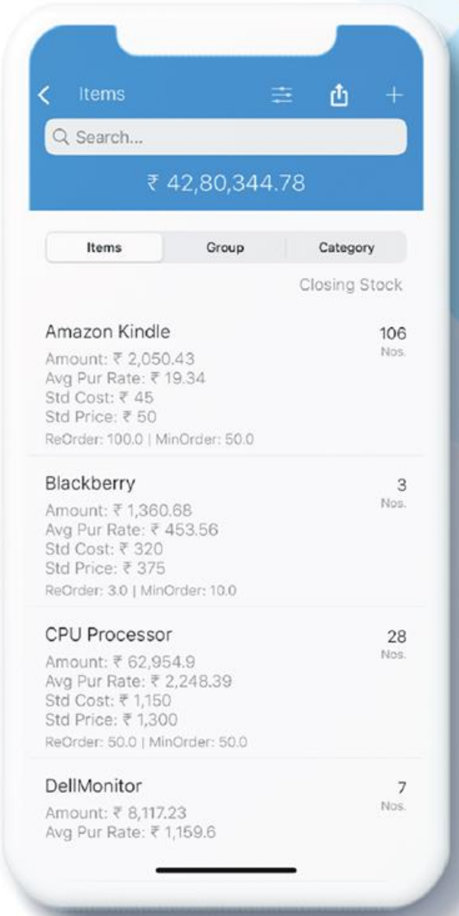


Live Inventory

Track your stock and know the exact quantity of the stock in your inventory

Steps:

- ✔ Click on 'Item' at the top
- ✔ Select any item and you can see the inventory closing

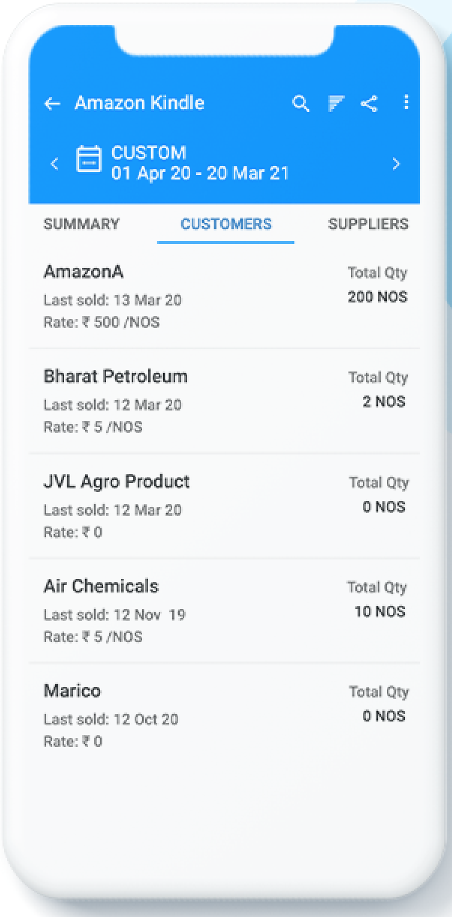


Item Transactions

View the customers who buy an item, sell it to them again and reduce the inventory closing

Steps:

- ✔ Go to Item > Select an Item and view the entire summary
- ✔ Next to the summary, you can view entire customer and supplier list



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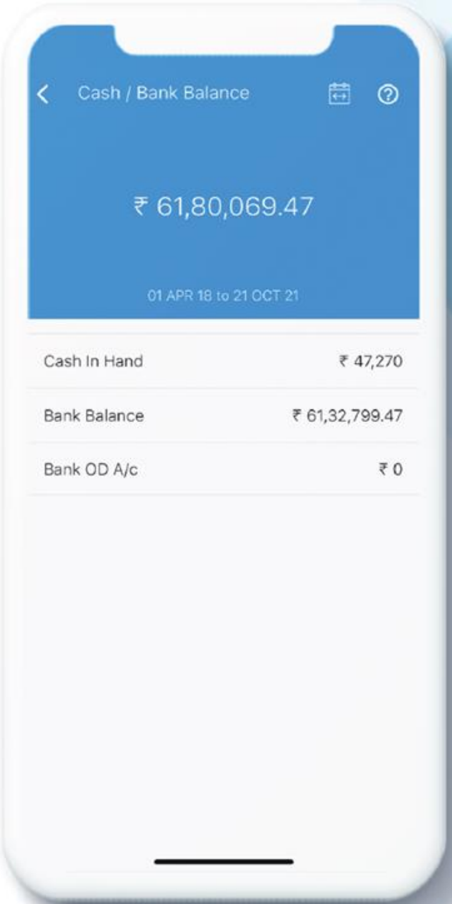
Cash & Bank Balance

View the closing balance as well as cash and petty cash balance here

Steps:

- ✔ Go to Dashboard > Cash / Bank Balance
- ✔ Select a particular bank to see the opening balance, transactions & the current closing balance



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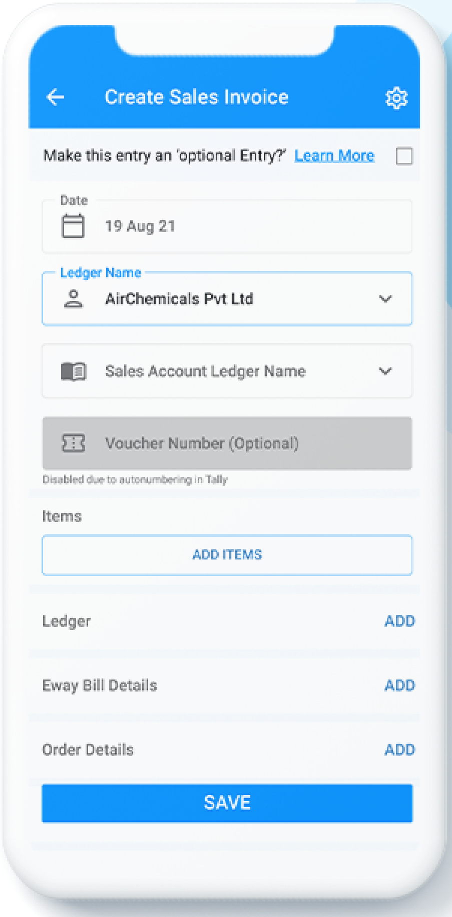
Data Entry

Create and share entries instantly to speed up your business transactions

Steps:

- ✔ Go to Sales Team > All Entries
- ✔ Create Sales / Purchase Invoice, Sales / Purchase Order, Payment, Receipt, Quotations, Receipt Note / Delivery Note & Journal Voucher Entry



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Check In & Check Out

Track your team's location, time spent at meetings and meeting logs

Steps:

- ✔ Go to Sales Team > Team Check-In Report
- ✔ Select a sales person to view their reports

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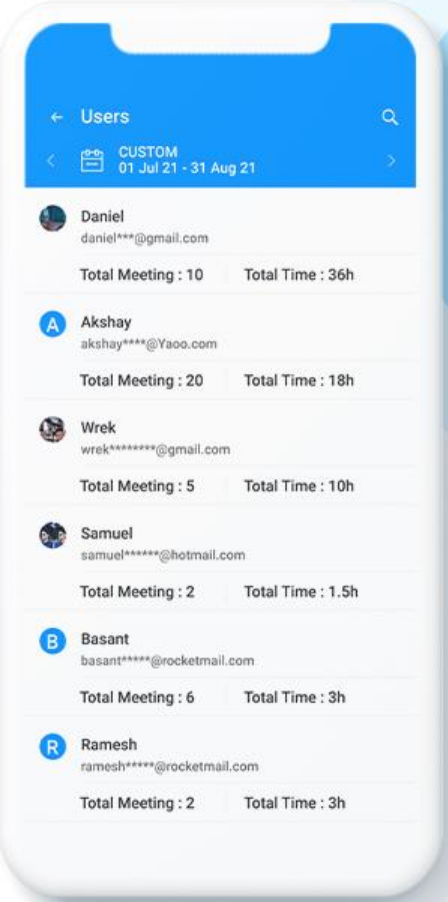


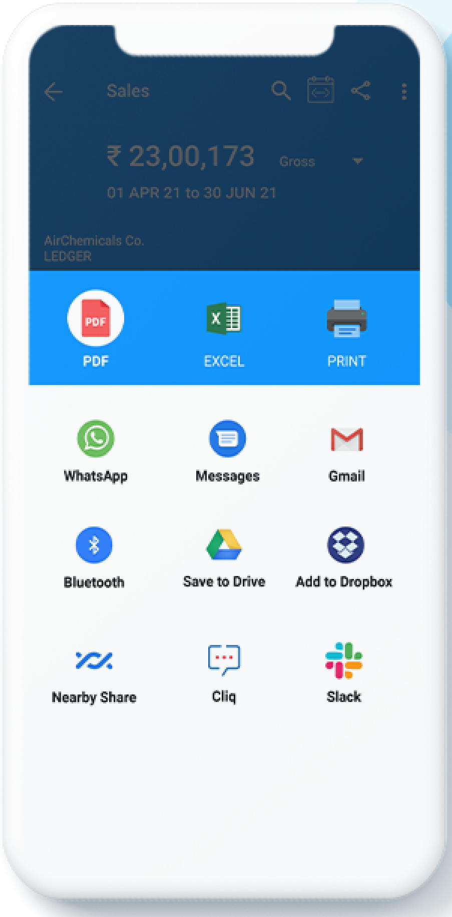
Easy Sharing

Speed up your work by sharing Invoice, Outstanding, Ledger report etc from your phone

Steps:

✔ Share Reports via Email, WhatsApp, SMS or print them

✔ Share reports and entries in PDF, Text, Excel format or print them



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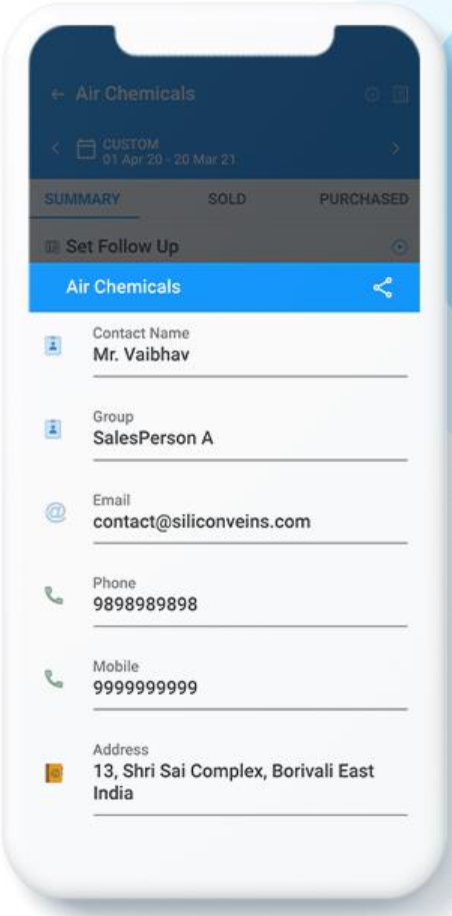
Customer Information

Reduce your dependency on your team for customer information

Steps:

- ✔ Go to Dashboard > Party > Select the customer
- ✔ Click on the (i) on the top right side of the screen



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Expenses, Balance Sheet, Profit & Loss

Reports that help you curb expenses and help you take informed decisions

Steps:

- ✔ Go to Reports
- ✔ Select Expenses /Balance Sheet /Profit & Loss to view the figures

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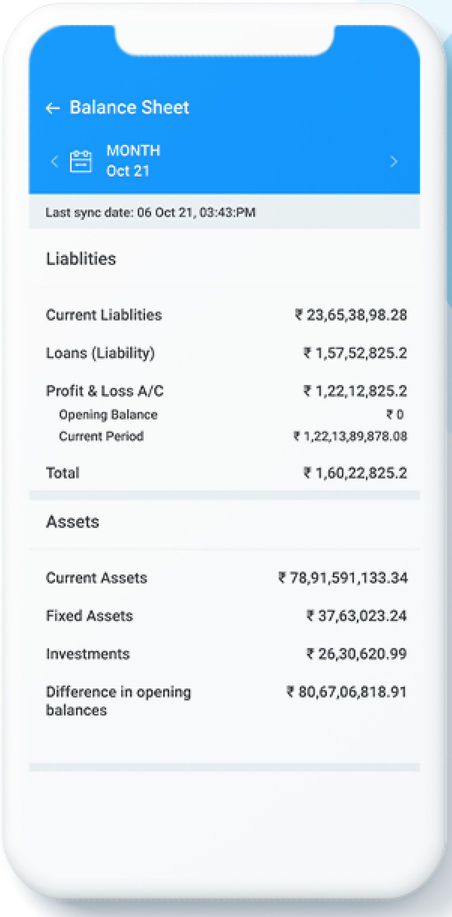
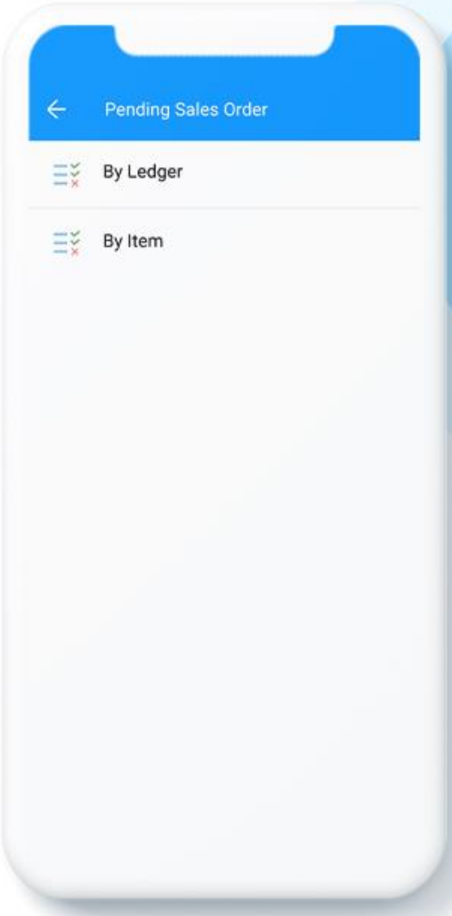


Pending Purchase & Sales Order

View and reduce your pending orders easily

Steps:

- ✔ Go to Reports > Click on Pending Sales Order / Purchase Order
- ✔ View by the list by Item/ Ledger



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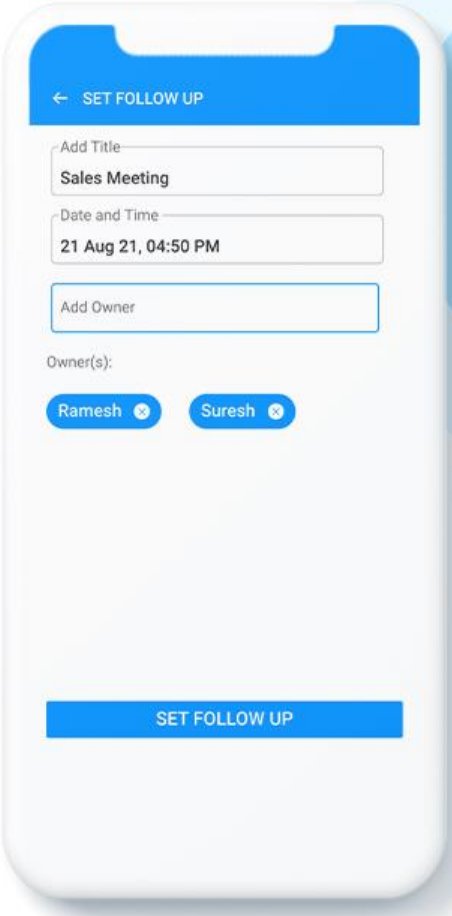
Follow up

Schedule follow up reminders and never miss an important business activity

Steps:

- ✔ Go to Party > Select a Customer
- ✔ Select set follow up

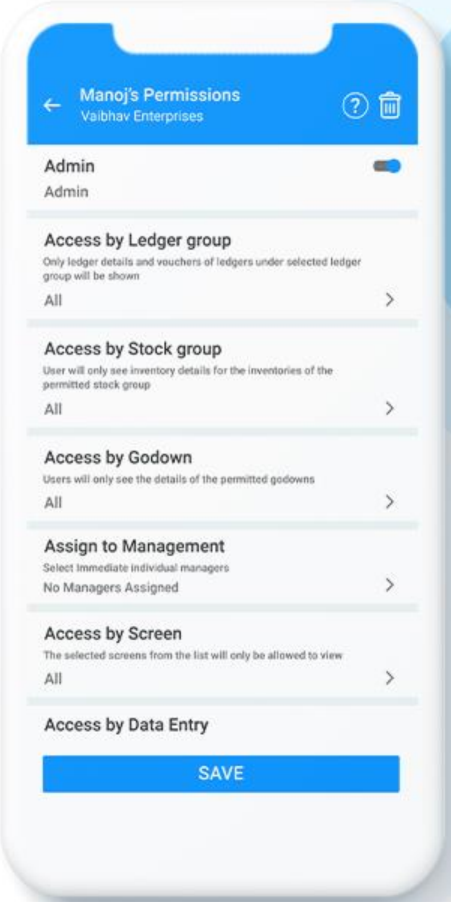


Limited Permission

Give your sales team restricted access to data that will help them perform better

Steps:

- ✔ Go to Menu > Users
- ✔ Select user > permission

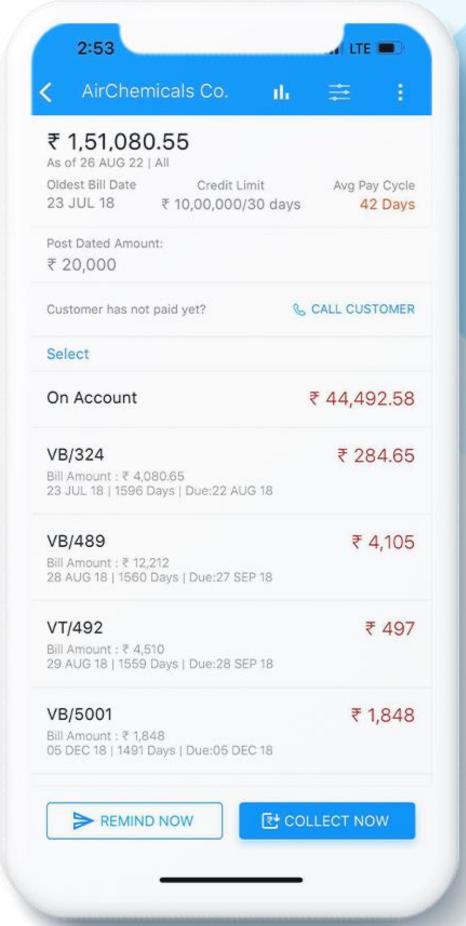


Payment Collection

Grow your business 3x Faster

Steps:

- Select a ledger from the Outstanding Tab
- Check the outstandings bills > Click Collect Now
- Fill in the required amount
- Generate QR code or Send payment links
- Make easy, fast and secure Payment Collections



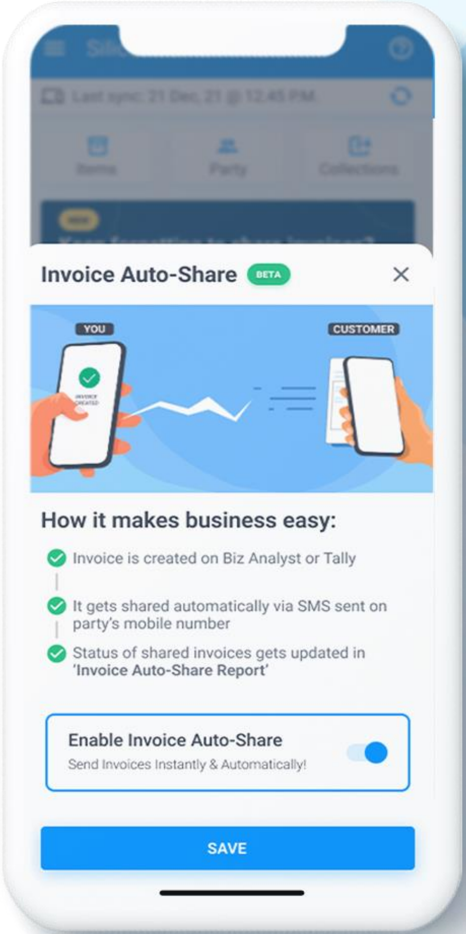
Auto Sharing of Invoices

Helps to get rid of manual sharing forever!

Enable auto-sharing for fastest delivery

Steps:

- Invoice Created will automatically be shared with your parties
- Can edit those invoices after sharing them
- Latest version can be viewed by the parties
- Enable Now!



E-invoicing

Now can share E-invoices with details like QR code,IRN, Acknowledgment date and number.

Steps:

- ✔ Go to dashboard > Select the entries
- ✔ Click the party > Select the voucher > Share E-invoice