INDIMARG

PHARMA ERP

USER MANUAL

A practical guide to setup, billing, inventory, returns and reports

Prepared for IndiMarg users

This guide documents the workflows visible in the supplied draft. Screen labels and available actions may vary by installed version.

Welcome to IndiMarg

IndiMarg Pharma ERP is presented in the supplied draft as a desktop application for maintaining pharmacy master data, recording purchases and sales, processing returns, and reviewing business and GST reports.

How to use this guide

Follow the setup sequence first. Create the master records needed for your business before entering purchase or sale transactions. Use the screenshots as visual references; the written steps are the primary instructions.

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01 Getting started and activation

1.1 Install IndiMarg

1. Download the IndiMarg installer (.exe) from the official IndiMarg website or the download location supplied by your administrator.
2. Locate the downloaded installer on your Windows desktop or in the Downloads folder.
3. Run the installer and follow the prompts shown on screen. The supplied draft does not specify the exact installer prompts or installation directory.
4. After installation, launch IndiMarg from the desktop shortcut or the installed application list.

1.2 Create the company account

On first setup, create the company using the fields identified in the draft:

- Company name
- Mobile number
- GST details / GSTIN, where applicable
- Email address
- Username
- Password

5. Enter the company and login details carefully.
6. Review the information for spelling and accuracy.
7. Submit the form using the action shown in the application. The original draft refers to creating the company but does not name the final button.

1.3 Activate the license

8. Open Settings.
9. Open License & Licensing.
10. Enter the license key provided by IndiMarg.
11. Use the on-screen activation action and review the license status shown in the application.

License safety
Keep the license key private and store it securely. If activation fails, check for typing errors and confirm the key and device eligibility with IndiMarg support.

02 Master data setup

Master data is the reference information used by purchase and sales transactions. Set up the relevant records before recording live transactions. Menu labels below follow the supplied draft.

2.1 Recommended setup order

12. Manufacturer
13. Salt
14. Packing
15. Unit
16. HSN
17. GST Tax
18. Supplier
19. Medicine / Item Master
20. Customer / Party

2.2 Manufacturer

21. Open Manufacturer from the master menu.
22. Choose Add Manufacturer.
23. Enter the manufacturer name and any other fields displayed in the form.
24. Save the record and confirm it appears in the manufacturer list.

2.3 Salt

25. Open Salt.
26. Choose Add Salt.
27. Enter the salt name.
28. Save the record.

2.4 Packing

29. Open Packing.
30. Choose Add Packing.
31. Enter the packing name.
32. Save the record.

2.5 Unit

33. Open Unit.
34. Choose Add Unit.
35. Enter the unit name and short name.
36. Save the record.

2.6 HSN

37. Open HSN.
38. Choose Add HSN.

39. Enter the HSN code and description.
40. Save the record.

Accuracy matters
Use the HSN classification applicable to the product and your business. If you are unsure which code applies, confirm it with your tax professional.

2.7 GST Tax

41. Open GST Tax.
42. Choose Add GST Tax Rate.
43. Enter the applicable GST rate and any other fields shown by the form.
44. Save the rate and verify it is available for selection.

2.8 Supplier

45. Open Supplier.
46. Choose Add Supplier.
47. Enter the supplier name and the available contact, phone, email, GSTIN, drug licence number and address details as applicable.
48. Choose Create Supplier and confirm the record appears in the list.

2.9 Medicine / Item Master

49. Open Item Master.
50. Choose Add Medicine.
51. Complete the medicine details requested by the application, using the master records already created where applicable.
52. Review the details and choose Save Medicine.

Fields to verify in your build
The supplied draft does not include a readable Medicine form screenshot or a field-by-field list. Confirm the exact medicine fields and mandatory fields in the installed application before publishing a final, field-specific SOP.

2.10 Customer / Party

53. Open Customer / Party.
54. Choose Add Customer.
55. Enter the customer details requested by the application.
56. Save the customer and confirm it is available for billing.

B2B customer records
The sales instructions state that B2B billing requires a GST number. Confirm the customer GSTIN before creating a B2B bill.

03 Sales billing

Use Sale Bill for counter sales. The supplied screen is labelled Counter Sale Bill.

3.1 Create a sale bill

57. Open Sale Bill from the Transaction section.
58. Enter or select the customer. Use the walk-in option if it is appropriate for the transaction and available in your build.
59. Select the customer type: B2C or B2B. The draft notes that B2B requires a GST number.
60. Search for the medicine by medicine name or salt.
61. Select the required medicine from the results and add it to the bill.
62. Enter or review the applicable quantity and other line details shown by the application.
63. Apply a discount only when applicable and authorised.
64. Review the bill items, totals, tax and customer details before checkout.
65. Choose Checkout and then Complete Sale, following the on-screen confirmation.

3.2 Before completing the sale

- Confirm the correct customer and B2C/B2B type.
- For B2B, check the GST number.
- Check the selected medicine and quantity.
- Review discounts and the displayed total.
- Do not complete the sale until the bill details are correct.

If a medicine cannot be found

Check that the medicine has been created in Item Master and that the relevant master data has been saved. If it still does not appear, contact your system administrator.

04 Purchase entry

Use Purchase Bill to record stock received from a supplier. The supplied draft captures supplier invoice details and batch-level medicine details.

4.1 Enter a purchase bill

66. Open Purchase Bill from the Transaction section.
67. Select the supplier.
68. Enter the supplier invoice number and invoice date.
69. Enter the settlement discount, if applicable.
70. Under Add Purchase Item, select the medicine.
71. Enter the batch number, manufacturing date and expiry date.
72. Enter quantity, purchase rate, item/trade discount, MRP and selling price.
73. Review the purchase item details, then choose Add to Invoice.
74. Repeat for additional items on the same supplier invoice, as required.
75. Review the invoice details and choose Submit Purchase.

4.2 Purchase-entry review

- Confirm the supplier invoice number and date against the supplier document.
- Check batch number, manufacturing date and expiry date carefully.
- Verify quantity, purchase rate, discount, MRP and selling price before adding the item to the invoice.
- Review all items before submitting the purchase.

05 Returns

5.1 Sales Return

The supplied workflow begins with the original bill number and then asks the user to select the medicine being returned.

76. Open Sales Return.
77. Enter the original sale bill number and search for the bill.
78. Select the medicine to be returned from the displayed items.
79. Enter the return quantity or other requested return details shown by the application.
80. Write the return reason.
81. Review the selected item and return details.
82. Choose Process Return and follow any confirmation displayed.

5.2 Purchase Return (Debit Notes)

83. Open Purchase Return from the Transaction section.
84. Select the supplier.
85. Select the inventory batch or batches to be returned.
86. Review the displayed debit-note total and selected batch details.
87. Choose Process Return and follow the on-screen confirmation.

06 Reports and day-end summary

6.1 Business Reports

The draft shows a Reports area with report categories and a date-range workflow. The Sales Register screen includes Start Date, End Date and Generate Report.

88. Open Business Reports.
89. Choose the relevant report category or tab available in your version.
90. Set the start and end dates for the reporting period.
91. Choose Generate Report.
92. Review the generated results and use any export or print option only if it is available in your installed version.

6.2 GST Reports

93. Open GST Reports.
94. Choose the reporting period using Start Date and End Date.
95. Choose Generate Report.
96. Review the GST summary and breakdown displayed for the selected period.

Use these figures as application output and reconcile them with the underlying bills and your accounting records before statutory filing. This manual does not certify tax calculations or filing readiness.

6.3 Day-End Summary

97. Open Day End Summary.
98. Select the date shown by the application, if a date selector is available.
99. Review the displayed financial summary, including the totals and sections visible on screen.
100. Use Print or Close Day only if those actions are available and appropriate under your business process.

07 Settings, company profile and licensing

7.1 General Settings

Open Settings and select General Settings. The supplied screenshot shows configuration and database maintenance areas.

- Review settings carefully before changing them.
- Use Save Configuration only after checking the values entered.
- The screenshot shows a Database Backup area with a Backup Database action.
- The screenshot also shows a Database Restore area with a Restore Database action.

Database restore is a high-impact action

Do not restore a database unless you understand which backup will be used and what current data may be replaced. Confirm the backup location, restore procedure and recovery plan with IndiMarg support or your system administrator first. The draft does not specify the exact file path or restore steps.

7.2 Company Profile

101. Open Settings.
102. Choose Company Profile.
103. Review the company name and the business/contact fields displayed.
104. Update only details that are authorised and accurate.
105. Choose Save Changes and verify the updated profile.

7.3 License & Licensing

106. Open Settings.
107. Choose License & Licensing.
108. Review the license information and status displayed.
109. Use the available license action only when required, following the instructions supplied with your license.

08 Daily operating checklist

Opening routine

- Launch IndiMarg and confirm the correct company is open.
- Check license status if the application displays a warning.
- Confirm the required medicines, suppliers and customers are available.

During the day

- Record supplier purchases with correct invoice and batch details.
- Create sales bills only after checking customer type, medicine, quantity and totals.
- Process returns against the appropriate original bill or supplier/inventory record.
- Keep source invoices and supporting documents available for reconciliation.

End of day

- Review Business Reports for the relevant date range.
- Review GST Reports when required and reconcile them against transaction records.
- Review the Day-End Summary.
- Use Close Day only after its effect has been confirmed and your business process calls for it.
- Follow your approved backup procedure; do not assume a backup succeeded until the application confirms it.

Suggested master-data checklist

Master	Check before use
Manufacturer	Name is correct and saved
Salt	Salt name is correct and saved
Packing / Unit	Names and short names are consistent
HSN / GST Tax	Tax classification and rate have been verified
Supplier	Contact and applicable business details are correct
Medicine	Medicine is linked to the correct available master records
Customer / Party	Customer type and GST details are correct where applicable

09 Troubleshooting and support notes

Common checks

Situation	First checks
License does not activate	Re-enter the key carefully; confirm it was supplied by IndiMarg; contact support if the status remains unchanged.
Medicine is missing from search	Check Item Master and confirm the medicine was saved; review spelling and relevant master records.
B2B bill cannot be completed	Confirm B2B is selected and the customer GST number is present and correct.
Purchase details look incorrect	Compare supplier, invoice number/date, batch, dates, quantity, rates and discounts with the source invoice before submitting.
Report totals appear unexpected	Confirm the date range and report category; reconcile the underlying bills and returns; request support if the discrepancy persists.
Backup or restore is unclear	Stop before restoring. Ask the administrator or IndiMarg support to confirm the approved procedure and backup file.

When contacting support

- Describe the screen and action you were using.
- Include the date/time and the steps that led to the issue.
- Share the exact error message, if one appears.
- Provide screenshots only after removing or masking passwords, license keys, and unnecessary personal or customer information.
- Do not send your password or license key in an unsecured message.

Release-readiness note

Before distributing this manual as the official release, have a product owner verify the exact field names, required fields, backup/restore procedure, return calculations, report definitions and Close Day behaviour against the current production build.

Appendix • Product scope and verification

This manual was expanded from the supplied 9-page draft and its 16 embedded screenshots. It is designed to be useful for onboarding while keeping undocumented product behaviour explicit.

Confirmed from the supplied draft

- Desktop installer (.exe), company creation and license activation through Settings → License & Licensing.
- Master setup for Manufacturer, Salt, Packing, Unit, HSN, GST Tax, Supplier, Item Master and Customer/Party.
- Sale Bill workflow with B2C/B2B customer type, medicine search by name or salt, discount and checkout.
- Purchase Bill workflow with supplier invoice details and batch, manufacturing/expiry, quantity, rate, discount, MRP and selling price fields.
- Sales Return and Purchase Return (Debit Notes) high-level workflows.
- Business Reports, GST Reports, Day-End Summary, General Settings, Company Profile and License & Licensing screens.

Confirm before official publication

- Exact medicine master fields and which fields are mandatory.
- Whether sale/purchase actions support printing, exporting, payment modes or other options not described in the draft.
- Return approval rules, stock movement, refund/debit-note accounting and cancellation behaviour.
- Database backup location, backup format, restore steps and recovery behaviour.
- Exact report definitions, GST calculations, export options and the effect of Close Day.
- Official support contact details, product version and document revision policy.

INDIMARG | Practical workflows. Clear records. Better day-to-day control.