BizBook

CUSTOMER & SUPPLIER MASTER DATABASE

User Manual

Everything about using BizBook — creating your free account, adding customers & suppliers, searching in 2 seconds, backing up your data, earning free days with referrals, and renewing your licence. With real screenshots of every screen.

🚀 Create your free account & login

📝 Add customers & suppliers — every field explained

🔎 Search · 📊 database · ☁️ Google Drive backup

🎁 Refer & earn +23 free days · 🔁 renewal & invoices

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WELCOME

Welcome to BizBook 👋

BizBook keeps **every customer and supplier of your business in one simple, searchable database** — name, mobile, GST number, address and payment terms. No more searching diaries, Excel files and WhatsApp chats for one number.

What you can do	How BizBook helps
Save every party	Customer or supplier — with GSTIN, address, mobile, payment terms
Find anyone in 2 seconds	Search by name, mobile, GST number or city
Never lose data	Backup to your own Google Drive + CSV export anytime
Work from anywhere	Mobile, tablet, computer — any browser, nothing to install
Earn free days	Refer friends → +23 free days on every purchase through your link

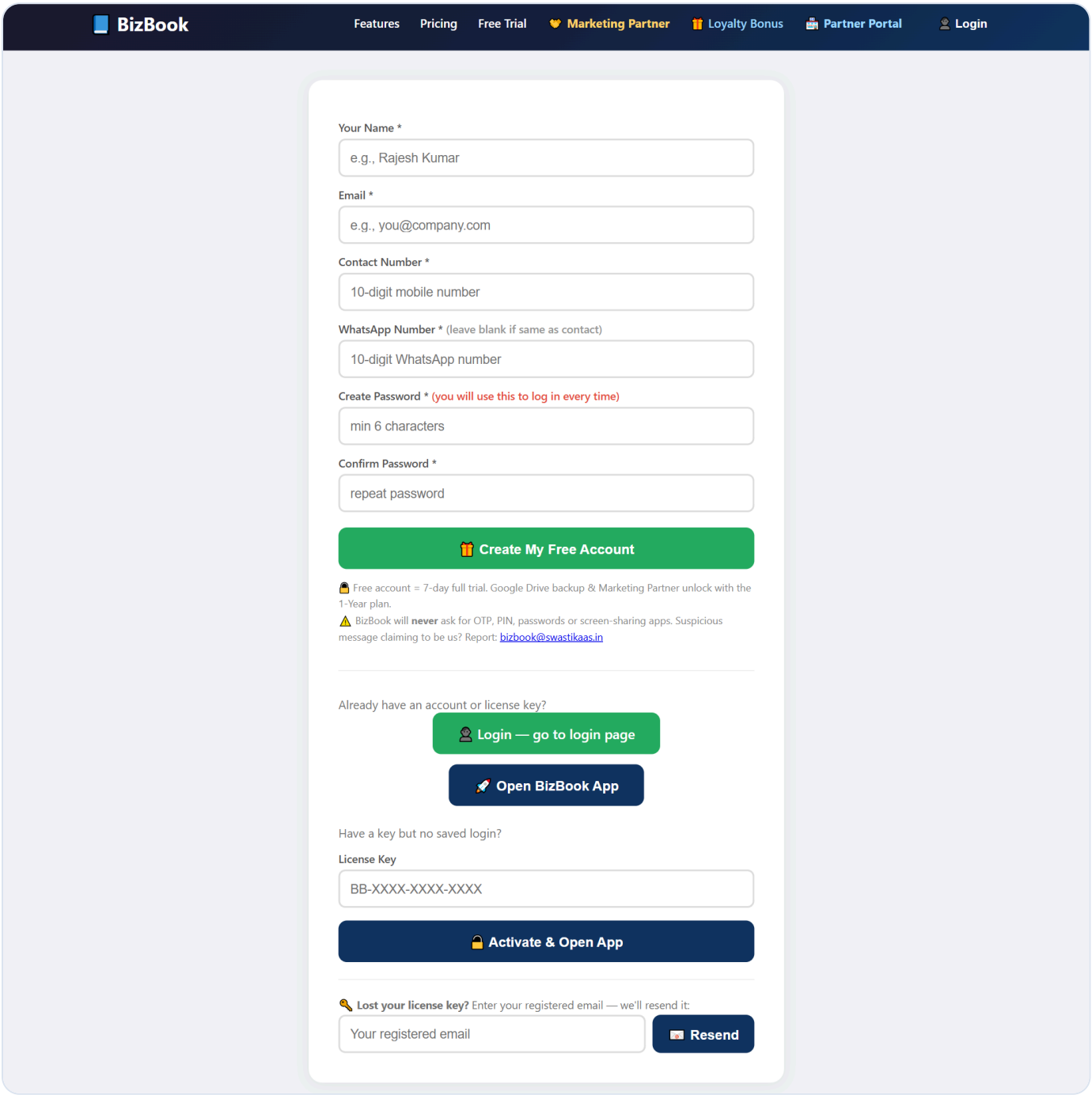
What's in this manual

1. Create your free account (7-day trial)
2. Login & the app tour
3. Adding customers & suppliers
4. Database, Search & Dashboard
5. CSV import/export & Google Drive backup
6. Refer & earn +23 days
7. Buying / renewing & your GST invoice
8. Help & support

🎁 **Free trial:** your first 7 days are completely free — full features, no card, no charges. After that the 1-Year licence is ₹599 (or ₹499 through a Marketing Partner).

Create your free account (2 minutes)

1. Open **bizbook.swastikaas.in** and scroll to **"Create your free account"**.
2. Fill: **Your Name, Email, Contact Number, WhatsApp Number** and create a **Password** (minimum 6 characters — you will use it to log in every time).
3. Click ✅ **Create My Free Account** — your 7-day free trial starts instantly.

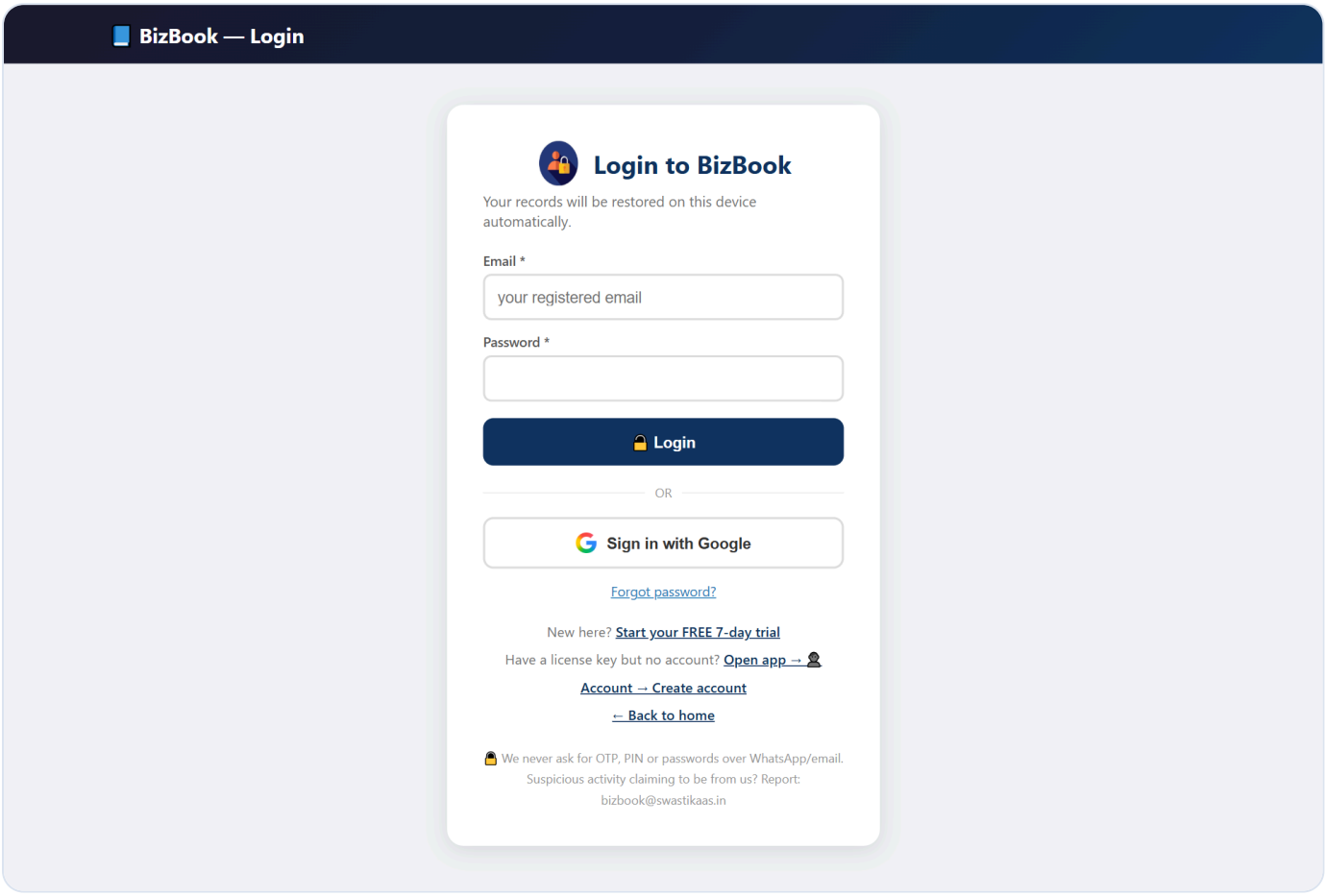


The signup form — name, email, contact, WhatsApp and password

Important: use an email you check daily — your **licence key, invoice and password resets** all come on this email. One account per email.

Login — from any device

1. Open **bizbook.swastikaas.in/login.html** (or click Login on the website).
2. Enter your **email + password** → **Login**. Your data opens exactly as you left it — on any phone, tablet or computer.

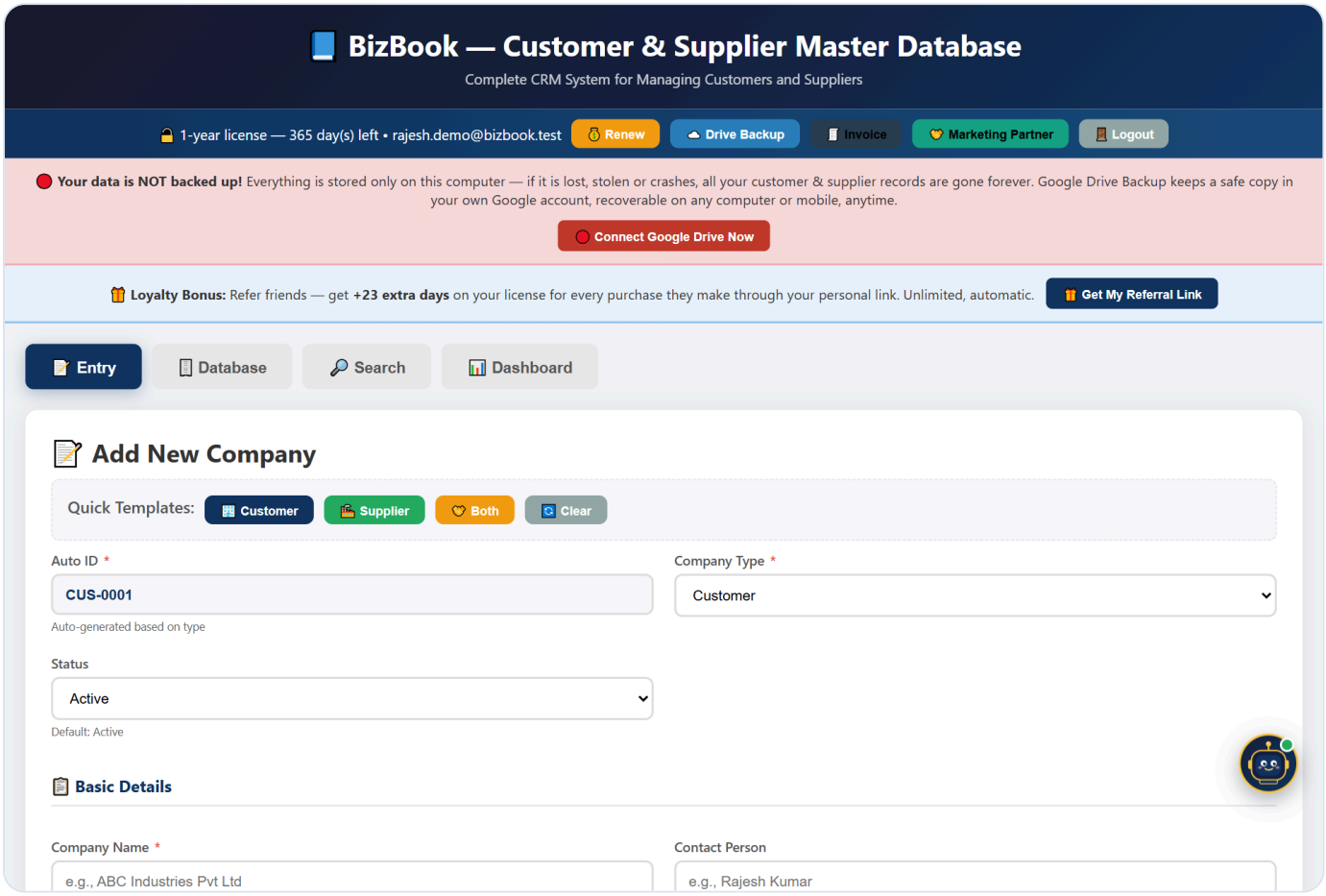


The login page — email + password, with Forgot Password below

If you forgot...	What to do
Password	Click **Forgot password** on the login page → enter your licence key + new password
Licence key	Search your email for **"BizBook"** — the key was emailed when you started/ purchased. Still stuck? WhatsApp us.

Security: BizBook will **never** ask for your OTP, PIN, card details or screen-sharing. If anyone asks, refuse and report to bizbook@swastikaas.in.

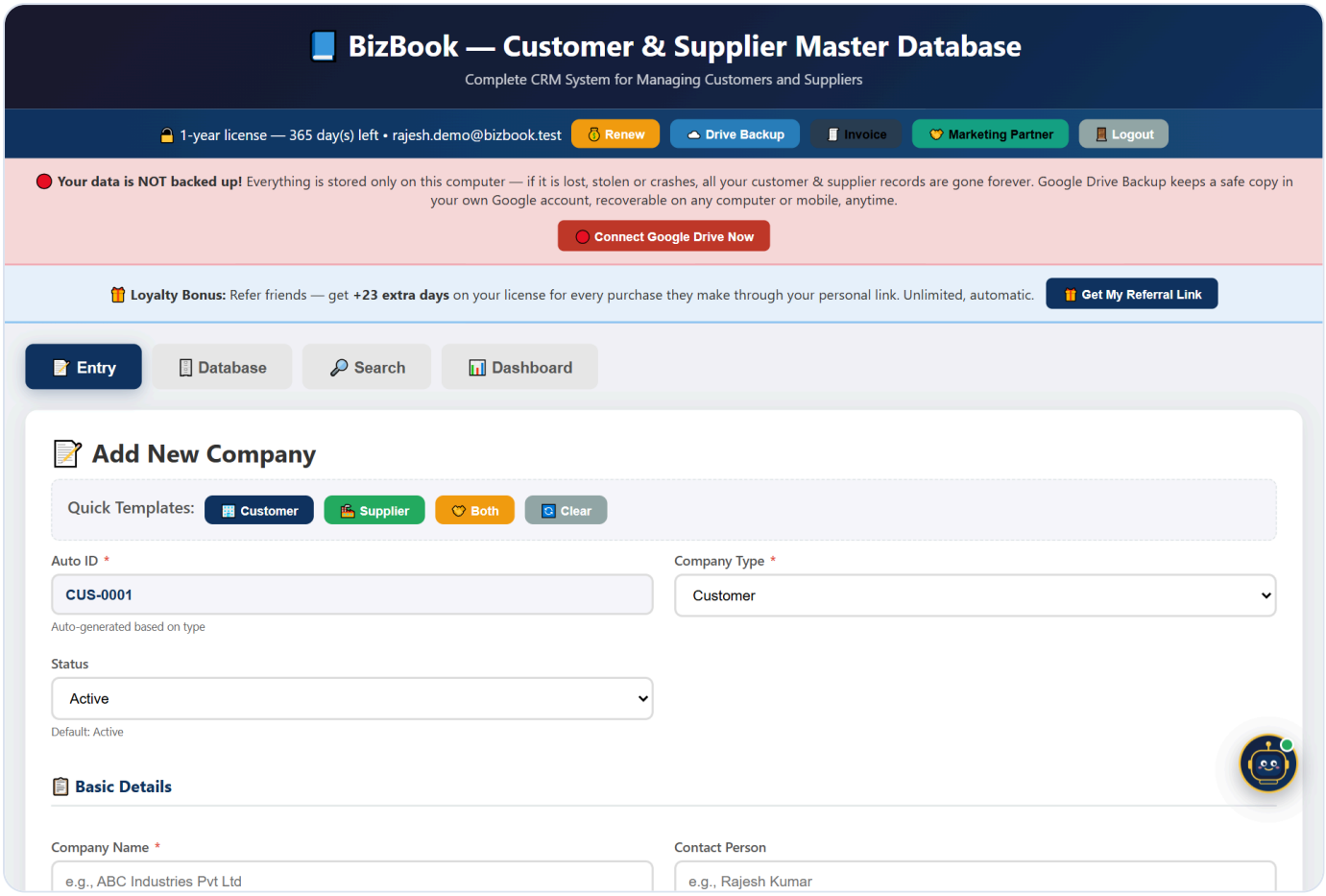
The app — your home screen



After login — plan banner on top, all features in one screen

What you see	What it does
Top banner	Your plan status — trial days left or licence validity (also shows backup status)
Entry	Add a new customer or supplier
Database	See, edit or delete all saved parties
Search	Find any party in 2 seconds
Dashboard	Summary of your data
Drive Backup	Backup to your own Google Drive
Invoice	View / download your GST invoice

Adding a customer or supplier



The Entry form — one screen for every party

1. Click 📝 **Entry** → choose type: **Customer**, **Supplier** or **Both**.
2. Fill what you know — **company name and mobile** are enough to start. GST number, payment terms, address can be added now or later.
3. Click 💾 **Save Record**. Done — the party is in your database.

💡 **Good habit:** after every sale or purchase call, add the new party the same day. In one month your whole business is inside BizBook.

Every field explained

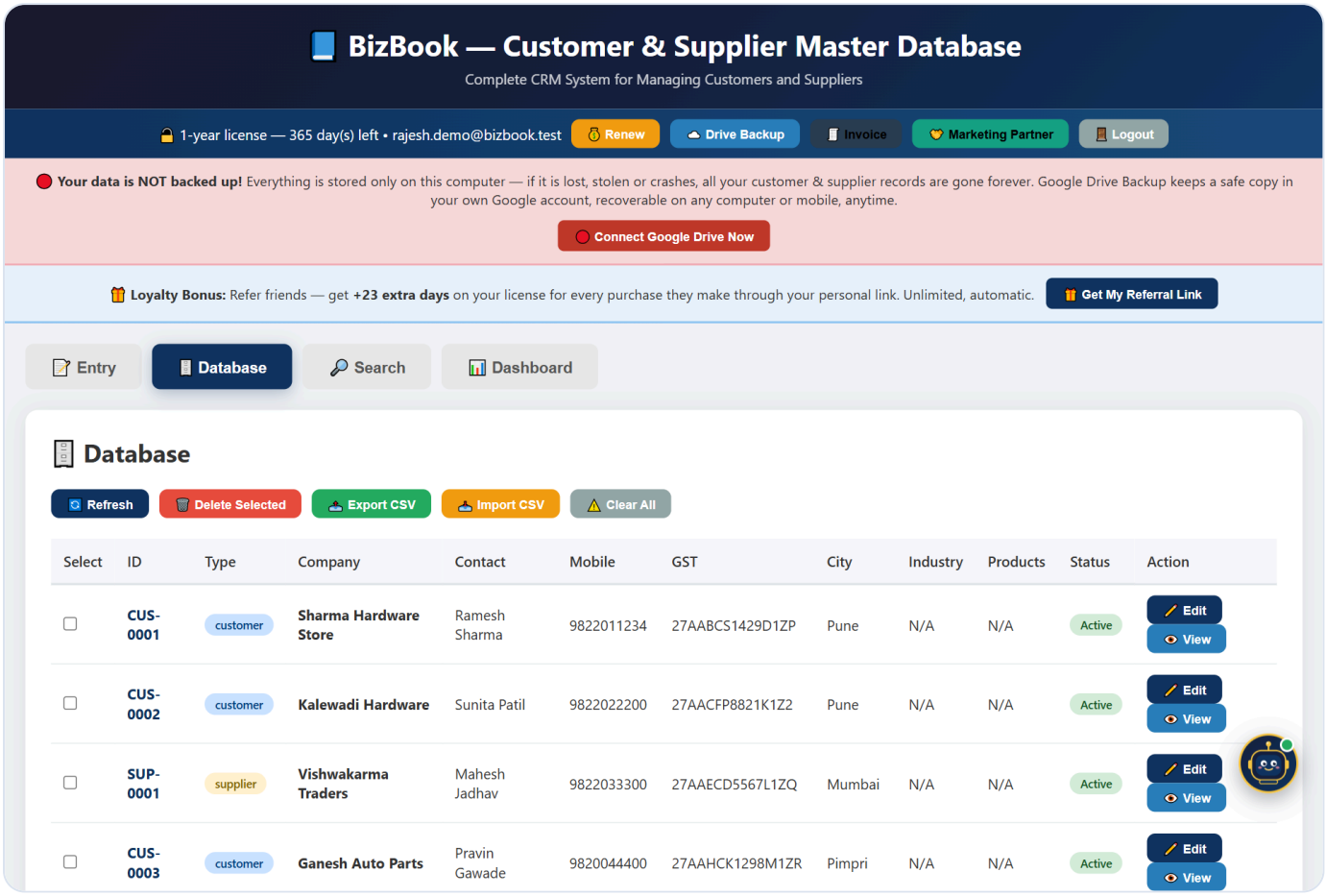
Field	What to enter	Why it matters
Type	Customer / Supplier / Both	Filters and counts stay correct
Company name	Firm or shop name	Main identity — searched most
Contact person	Owner / manager name	Know whom to ask for
Mobile + Alternate	Main number + owner's son / manager	Never lose a number again
Email / Website	If they have one	Sending bills & statements
GST number	Their GSTIN	Needed before raising bills
PAN number	If available	Compliance records
Address / City / State / PIN	Full billing address	Delivery & invoices
Payment terms	Cash / 7 days / 15 days credit…	**Most useful field** — no more arguments
Credit limit	Maximum udhaar allowed	Control your risk
Remarks	Anything — "Diwali order every year"	Your memory, saved forever
Status	Active / Inactive	Hide old parties without deleting

💡 **Minimum vs complete record:** in a hurry? Save with just **company name + mobile** — fill the rest later with Edit. But do complete **GST number and payment terms** over time — these two fields help you the most.

⚠️ **Enter GST numbers correctly:** a GSTIN has 15 characters (e.g., 27AABCS1429D1ZP) — the first 2 are the state code (27 = Maharashtra). Check once before billing; a wrong GST can get a bill rejected.

✅ **Weekly 10-minute cleanup:** open Database → Edit the parties whose GST or payment terms are still empty. In a few weeks your database becomes 100% complete.

Database — all your parties in one list



Database — every saved party, with Edit / Show on each row

Click **Database** to see everyone you have saved. Filter by type (customer / supplier) or status. On every row:

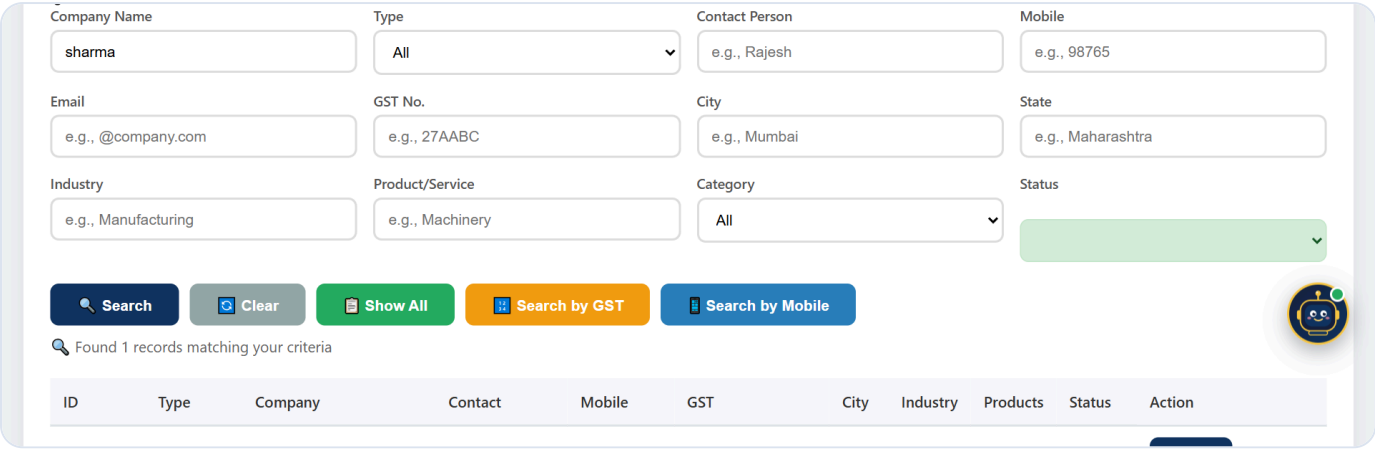
Button	What it does
Show	Opens the full record — every field on one screen
Edit	Change anything — new mobile, new terms, new address

CSV import & export (Excel)

- **Import:** have your list in Excel? Save it as CSV and import — your whole list comes inside BizBook in minutes.
- **Export:** download your full database as a CSV file anytime — opens directly in Excel. Your data always belongs to you.

> **Tip:** the counter at the top shows how many parties are saved. Watching it grow is the best feeling of the week. 😊

Search — find anyone in 2 seconds



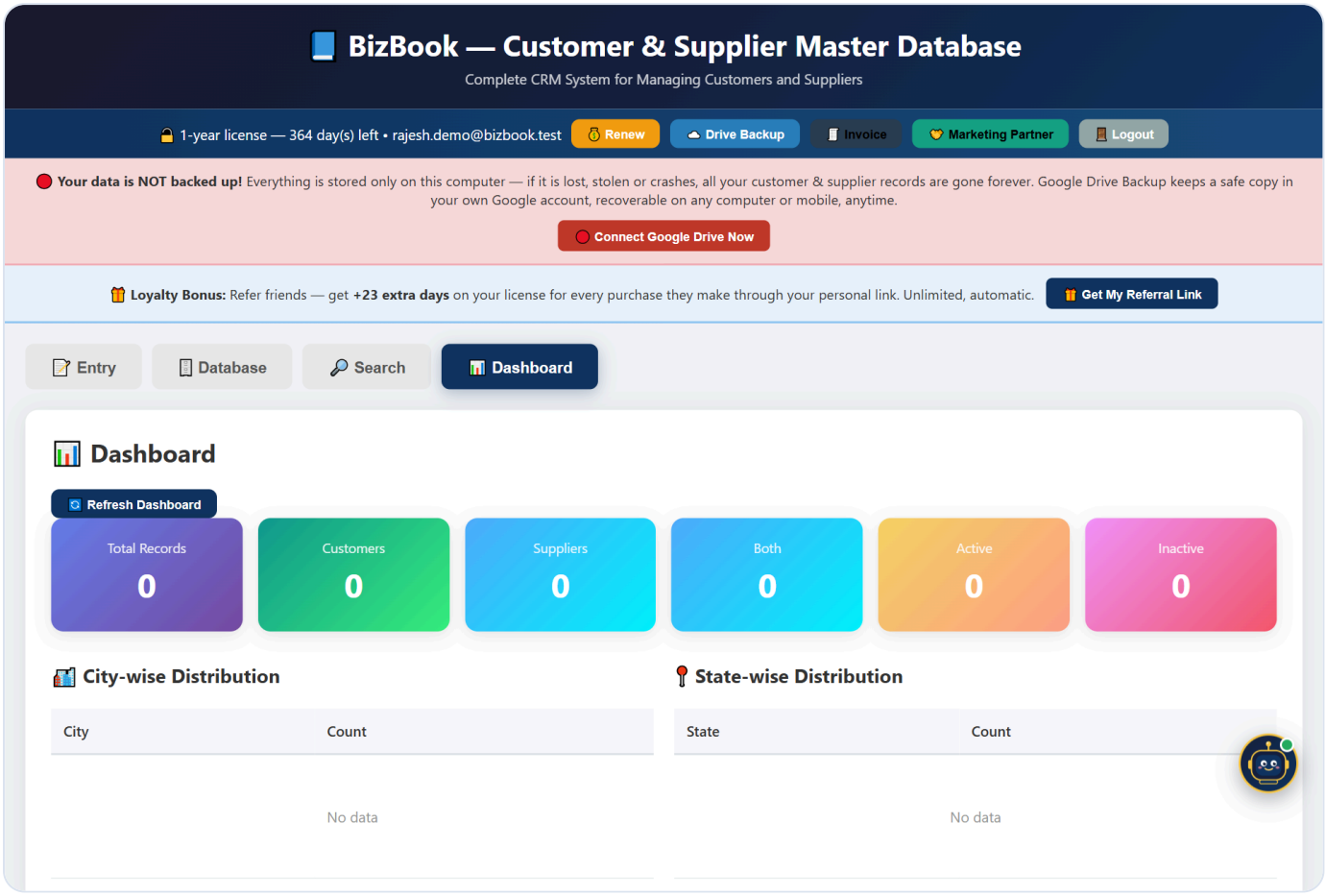
Search — "sharma" typed, the full record appears instantly

Click **Search**, type any part of a **name, mobile, GST number or city** → click **Search** → the matching parties appear with full details.

You remember...	Type this
Shop name "Sharma Hardware"	sharma
Only the mobile number	9822011234
Part of the GST number	27AAB
All parties in a city	Nashik

Before every follow-up call, one search shows you the party's **payment terms, GST and history** — you sound prepared every time.

Dashboard — your business at a glance



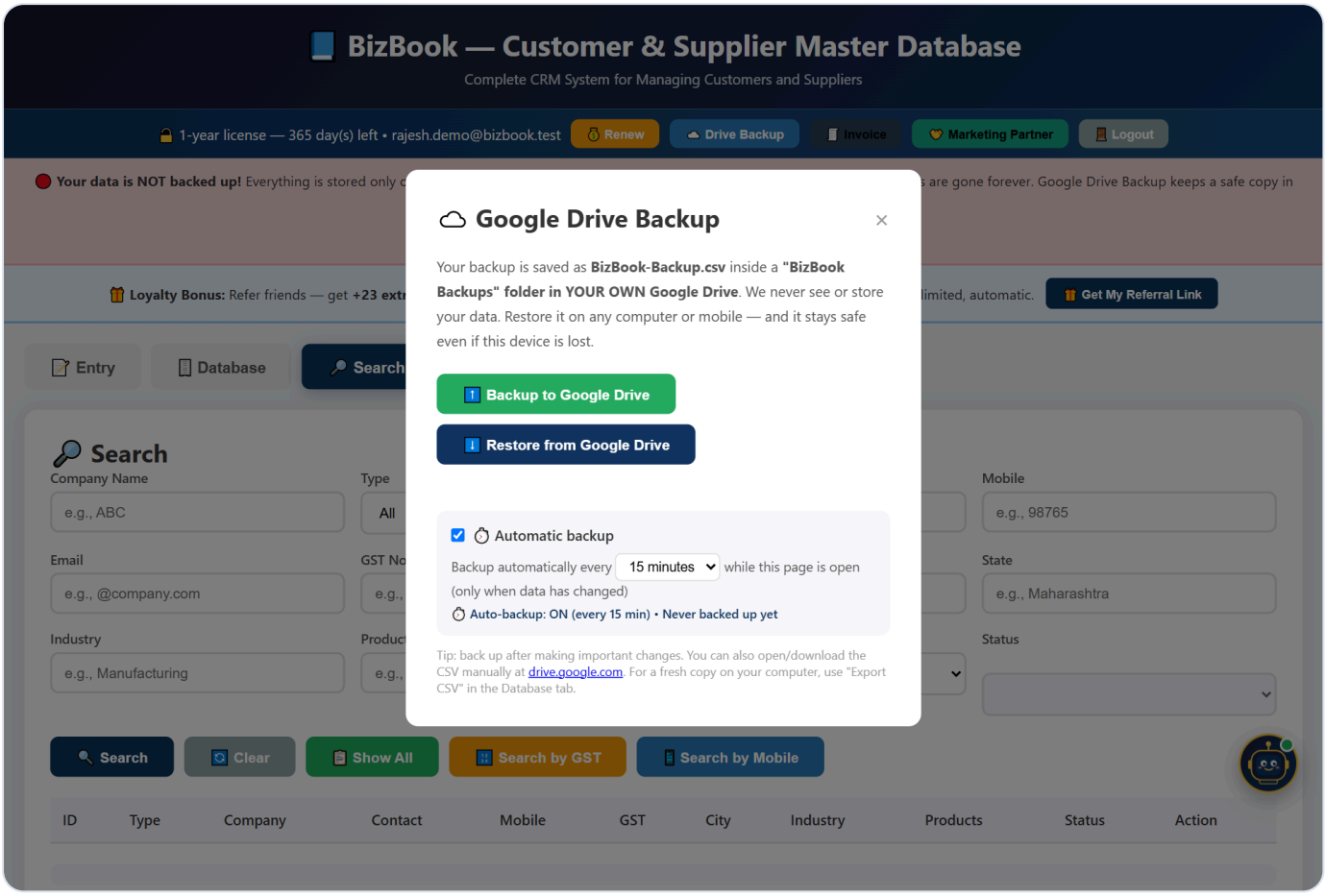
📊 Dashboard — totals of customers, suppliers and activity

The 📊 **Dashboard** shows your totals — how many customers, how many suppliers, active parties and more. It updates automatically as you add records.

- Check it every morning — it tells you your business size at a glance
- Share the numbers with your CA or partner when needed
- More parties saved = more useful your BizBook becomes

💡 **30-day challenge:** add 5 parties every working day — in one month 100+ parties will be inside, and BizBook becomes the heart of your business.

Google Drive backup — set it up today

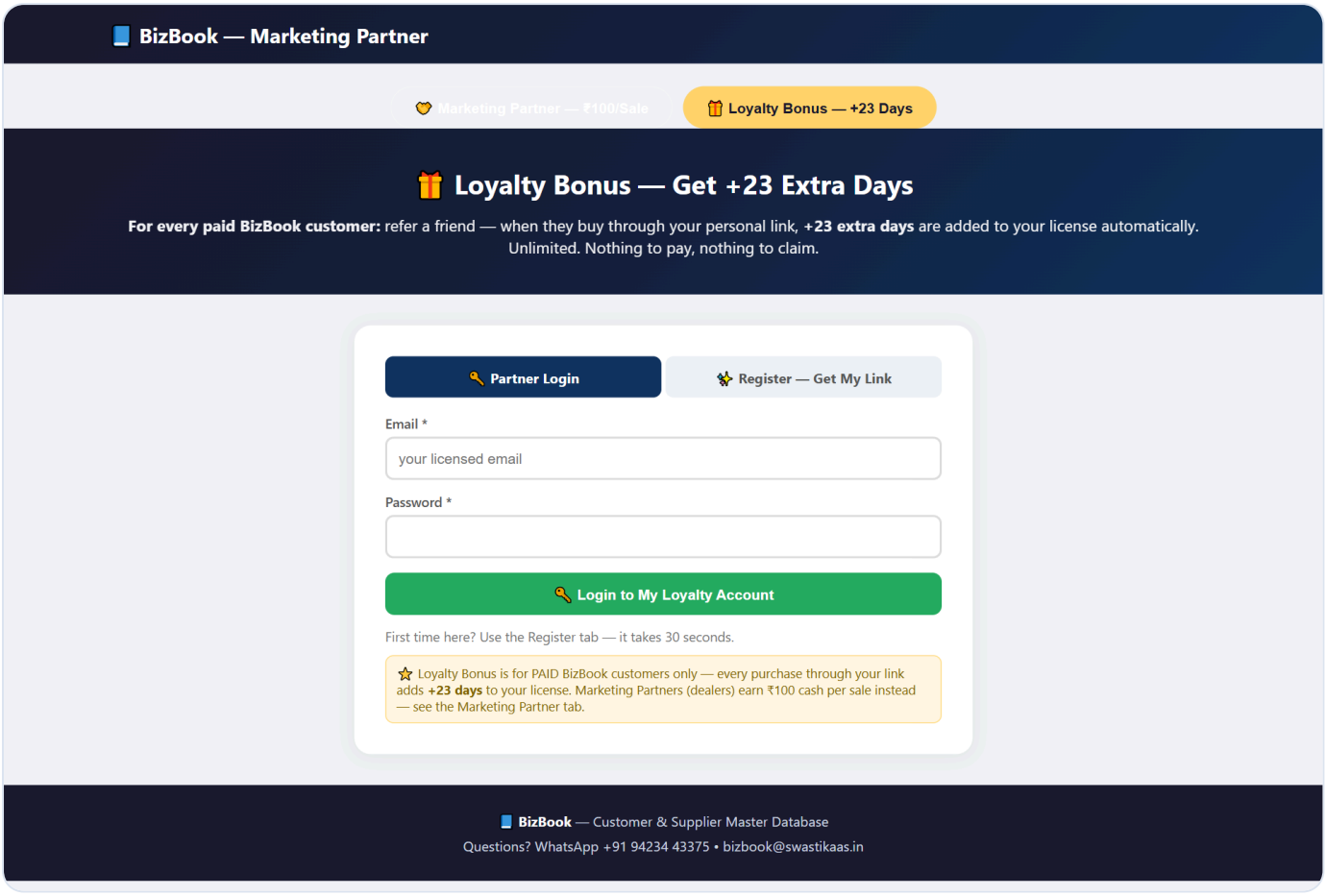


Drive Backup — connect once, then backup & restore anytime

1. Click **Drive Backup → Connect Google** — sign in with your Google account (one time).
2. Click **Backup** whenever you want — your database goes to **your own Google Drive** (folder: “BizBook Backups”).
3. **Restore** on any device — new phone, new computer, anything. Your data comes back exactly.

Three promises: ① The backup goes to YOUR OWN Drive — not even BizBook can see it. ② Expiry or renewal never deletes your data. ③ CSV export is always available — your data is never locked in.

Refer & earn — +23 free days per sale 🎁

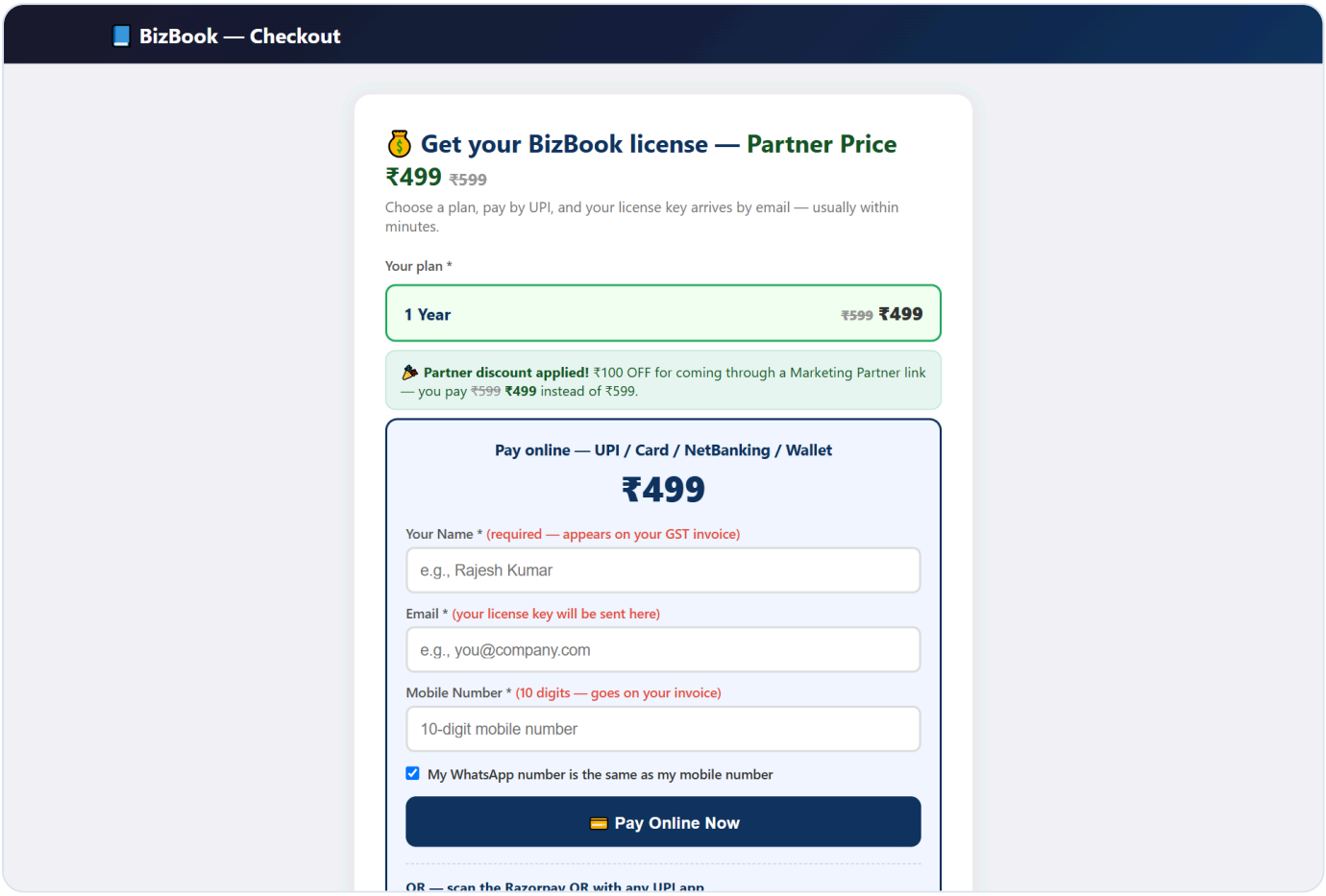


The Loyalty tab — your personal referral link and earned days

1. Open the **Loyalty** tab (inside the app / refer page) — copy your **personal referral link**.
2. Share it with shopkeeper friends — they get BizBook at **₹499** (₹100 off).
3. Every purchase through your link = **+23 days added to YOUR licence**. Unlimited — 10 friends = 230 free days!

Rule	Detail
Who earns	Any customer with an **active paid licence**
Reward	+23 licence days per referred purchase
Self-purchase	Does not count
Tracking	Loyalty tab shows every sale + days granted

Buying & renewing your licence

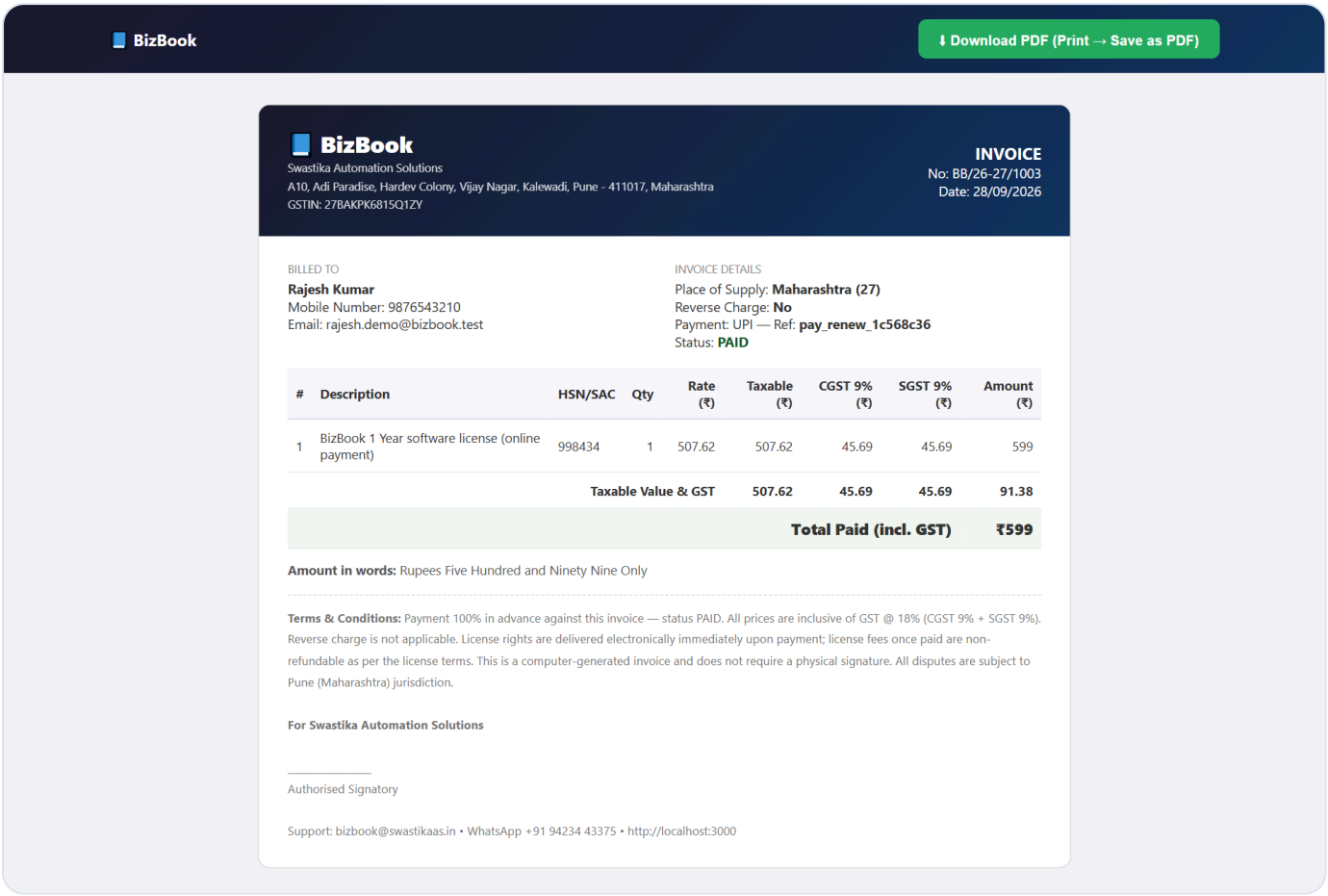


The checkout — fill name, email, mobile, WhatsApp; pay by UPI QR or card

1. Click 💰 **Renew / Buy** (top of the app) — or open the payment page.
2. Fill **Name, Email, Mobile, WhatsApp** (they go on your GST invoice).
3. Pay ₹599 by **UPI QR** (GPay/PhonePe/Paytm) or **card**. Through a partner link it's ₹499.
4. **Licence key + GST invoice arrive by email instantly.** Same key continues — all data stays.

🔁 **Renewal rule:** the new year extends from your current expiry — **no days lost**. And if your licence ever expires: your data is **locked, never deleted** — renew and everything returns.

Your GST invoice



A real BizBook GST tax invoice — your name, mobile & email on it

- Every payment gets a proper **GST tax invoice** — emailed instantly, every time
- Shows **your name, mobile & email**, taxable value, CGST 9% + SGST 9%, HSN/SAC and amount in words
- Seller: Swastika Automation Solutions · GSTIN 27BAKPK6815Q1ZY (use it for GST input credit)
- Download anytime: app → **Invoice** → **⬇ PDF**
- Lost the email? Ask Subbu (website chat) or WhatsApp us — we re-send it

💡 **Accounts tip:** keep your invoices — the ₹599 (or ₹499) with GST shown is a proper business expense record.

Help & support

Need	Where to go
Any question (price, trial, renewal, data…)	Ask **Subbu** — the chat assistant at bottom-right of bizbook.swastikaas.in (instant answers)
Paid but licence/invoice not received	WhatsApp **+91 94234 43375** with your UPI transaction ID — fast resolution
Forgot password / licence key	Login page → **Forgot Password** · key is in your purchase email
Anything else	📧 bizbook@swastikaas.in — replies within 1 working day

✅ Daily 5-minute routine that pays

1. Add every new customer/supplier of the day
2. Search before every follow-up call — terms & GST on screen
3. Backup to Drive weekly (paid plan)
4. Share your referral link with one shopkeeper friend (+23 days!)

B

BizBook — every customer, every supplier, one simple database

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