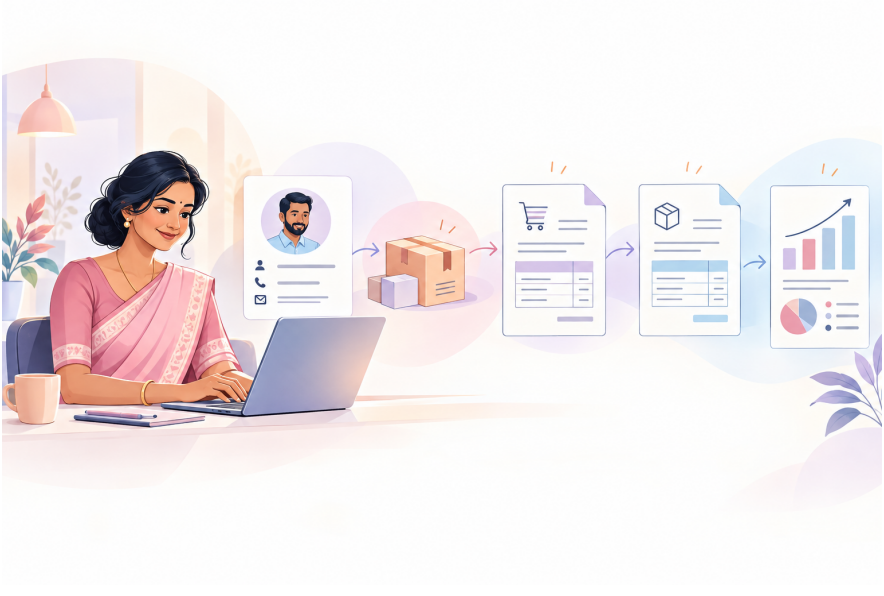
MyKonto
OCTET SOLUTIONS

USER GUIDE 01 / EVERYDAY BUSINESS WORK

Create invoices and quotations

Start with your own business details. Prepare a document, check it and share the PDF.



Sign in → **Prepare** → **Review** → **PDF / reports**

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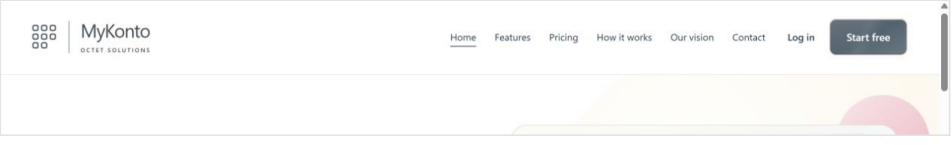
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SETUP

Business user

Log in or create your account

1. Visit **mykonto.in**. Choose **Log in** for an existing account or **Start free** to register. You can also go directly to app.mykonto.in.
2. On the sign-in screen, use your existing Google, Facebook or WhatsApp sign-in. New users choose **Create an account**.
3. WhatsApp registration asks for your name, email and WhatsApp number. Enter the code received on that number, then read and complete the terms shown during onboarding.



Actual application screen | Example data

> **REMEMBER**
> Already registered? Use the same sign-in method to find your existing records. New user? Complete registration before creating a document. Never share your OTP.

YOU ARE READY WHEN

You can sign in using your own account.



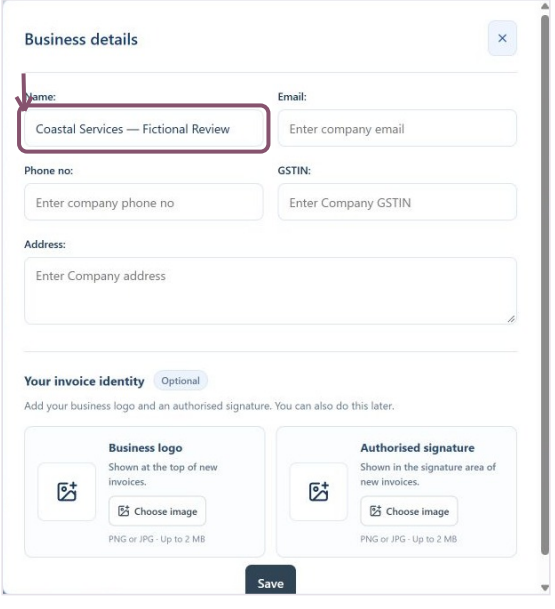
Next: Set up your business once

SETUP

Business owner

Set up your business once

1. Complete the business details shown during first setup: name, contact details, address and GSTIN where applicable.
2. Later, open **Profile** and choose **Edit business details** to review or update those details.
3. Add a business logo and authorised signature if wanted. Choose **Save**. Check issuer details on each document before sharing.



Actual application screen | Example data

REMEMBER
Logo and signature are optional. Profile information is reused for new documents; review existing invoices separately.

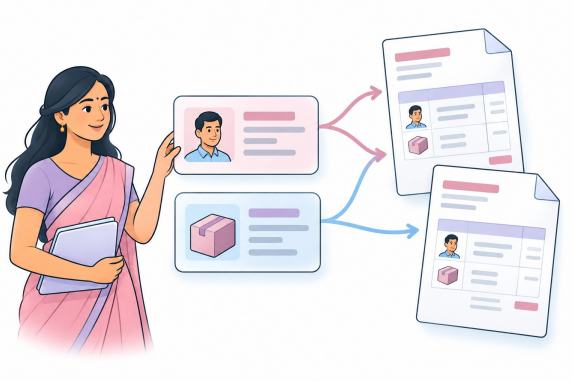
Next: Find your tools and reuse details

SETUP

Business user

Find your tools and reuse details

1. **Invoice management** is where you create, search and reopen invoices. **Quotation management** contains your offers.
2. Use **Saved details** to keep customers, products & services, bank details and terms ready to select again. Open **Reports** to see invoice summaries and export records.
3. For a single-user business, use the account's existing workspace. Creating a business team is optional and covered in Guide 03.



Save customer and item details once. Select them when preparing another document; check the details before continuing.

REMEMBER
A customer is the recipient of your invoice or quotation. You do not need a CA office or extra user to create documents.

Next: Choose the invoice type

INVOICE

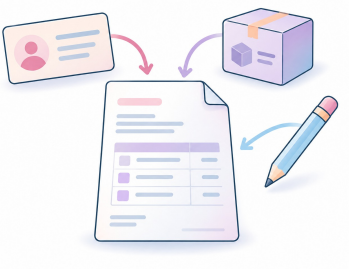
Business user

Choose the invoice type

1. Open **Invoice management** and choose **Create invoice**. The **Layout** step shows the next invoice number.
2. Choose **Standard invoice** for everyday goods/services, **Product invoice** for extra product fields, or **Service invoice** for work descriptions and references.
3. Choose the design and a supported Portrait or Landscape orientation. Use **Next: customer** to start the invoice.

Layout → Customer → Items → Payment → Review → Print

REMEMBER
Follow all six steps. Use the numbered steps or Back to revisit an earlier section. Invoice type stays fixed after creation; design and orientation are separate choices.



YOU ARE READY WHEN

You know the six steps to your first invoice.

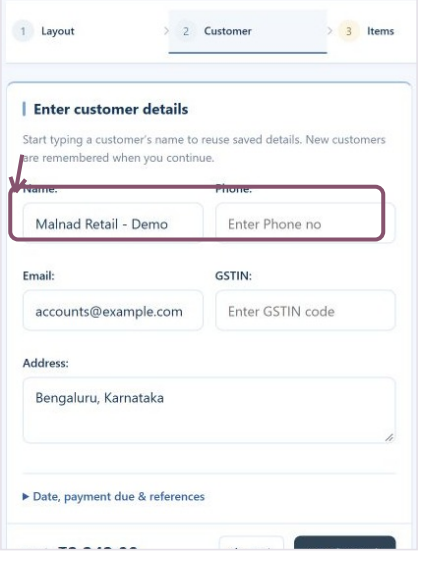
Next: Add or find your customer

INVOICES

Business user

Add or find your customer

1. At **Customer**, type the customer's name. Choose a matching saved customer, or enter the new customer's name and required details.
2. Check the address, contact information and GSTIN where relevant. Open the date, due-term and reference details as needed.
3. Continue to **Items**. New invoice customers are remembered when you continue; editing an invoice does not overwrite the saved customer automatically.



Actual application screen | Example data

REMEMBER
Use the six numbered steps to return to an earlier section. Check the customer on this invoice even after selecting saved details.

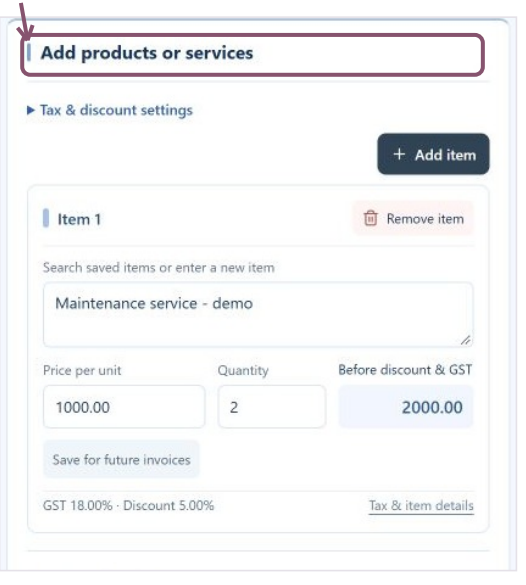
Next: Add items, GST and discounts

INVOICE / STEP 3 OF 6

Business user

Add items, GST and discounts

1. Search saved products/services or enter a clear description. Enter the unit price and quantity, then add more items as needed.
2. Open **Tax & item details** for that line's HSN/SAC, GST and discount. Check the overall tax/discount settings before adding further lines.
3. Check **Tax breakdown & totals**. Confirm the supply mode and the calculated amounts before continuing.



Actual application screen | Example data

REMEMBER
HSN identifies goods; SAC identifies services. You choose the applicable code and GST rate. Example: 2 x 1,000 less 5% = 1,900; 18% GST = 342; total = 2,242.

Next: Payment details and terms

INVOICE / STEP 4 OF 6

Business user

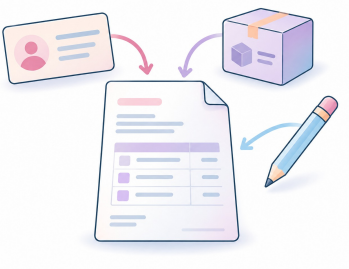
Payment details and terms

1. Open **Payment**. Check the invoice workflow status and choose how the customer can pay.
2. Enter the permitted payment instructions, invoice bank details and terms. Optional QR and signature uploads are available in this step.
3. Check that the QR, signature, bank information and terms appear in the preview. Continue to **Review**.

Payment → **Review** → **Print**

CHECK BEFORE SHARING

The invoice status is a workflow label, not proof that a payment has been received. A payment QR is an instruction to the customer; adding one does not itself collect or verify a payment.



YOU ARE READY WHEN

The customer has clear payment instructions.

Next: Review, then print or download

INVOICE / STEPS 5-6 OF 6

Business user

Review, then print or download

1. At **Review**, read the numbered observations and their colour legend. Choose **Edit** for an unintended entry, or leave an intentional value as entered.
2. Review notes help you check; they do not block printing. Check the customer, items, tax and totals yourself before sharing.
3. Continue to **Print**. Choose the design and orientation, then open **Print preview** or choose **Download PDF**. Check the final pages.



Actual application screen | Example data

REMEMBER
Review observations are for checking your entries; they are not tax certification. Check the final PDF pages before sharing. Use the downloaded PDF for a clean customer copy.



YOU ARE READY WHEN

The final PDF looks right before you share it.

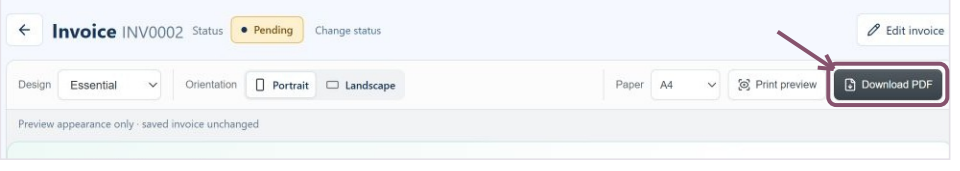
Next: Find and edit an invoice

DAILY WORK

Business user

Find and edit an invoice

1. Open **Invoice management**. Enter the invoice number, or use the available search-by options.
2. Open the saved invoice to view, print or download it. Choose **Edit invoice** when you need to change its details.
3. Make the correction, check that saving completes, then revisit Review and Print. Use the updated PDF when sharing the corrected document.



Actual application screen | Example data

> **REMEMBER**
> If a save conflicts with another window, preserve your entries and reload before retrying. A preview-only appearance choice on the saved view does not itself rewrite the stored invoice.

YOU ARE READY WHEN

You can reopen the right saved invoice.



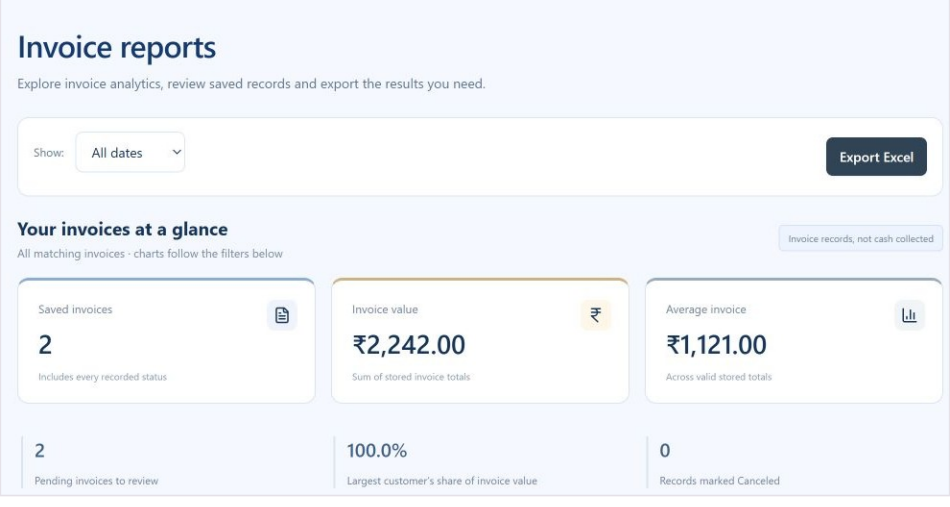
Next: See reports and export records

INVOICE

Business user

See reports and export records

1. Choose **Reports** from the menu. Review the invoice values, status summaries and customer insights.
2. Use the available filters to narrow the report. Scroll across the table to see all tax and amount columns.
3. Use the report export action when you need a spreadsheet copy. Exported records follow the current account or selected business.



Actual application screen | Example data

REMEMBER
Invoice workflow statuses are not confirmation of payment. Check the selected workspace and filters if a record is missing from a report.

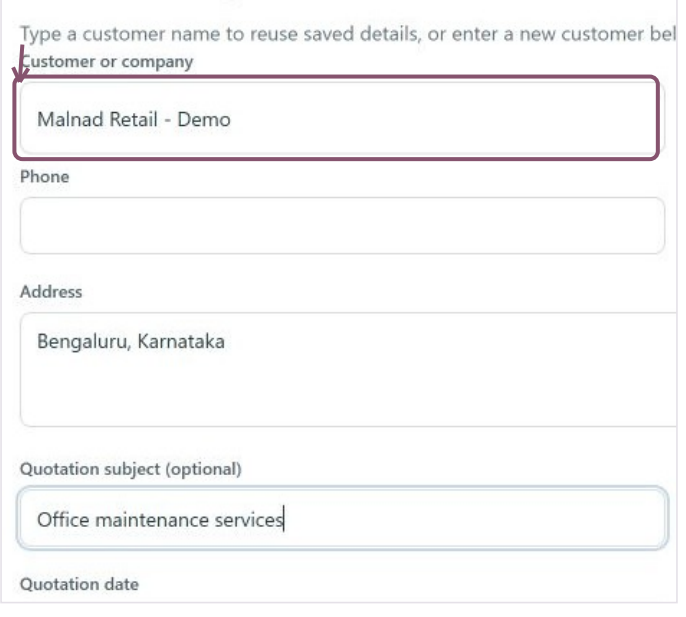
Next: Prepare your first quotation

QUOTATION / STEP 1 OF 3

Business user

Prepare your first quotation

1. Open **Quotation management** and choose **+ New quotation**.
2. Select or enter the customer. Add a quotation subject and reference if useful.
3. Set **Quotation date** and **Valid until**. Expand **Your business on this quotation** to check the issuer details.



Actual application screen | Example data

REMEMBER
Quotations have three steps: Customer, Items & terms, Review. Changes to the issuer details inside a quotation belong to that quotation; they do not update the business profile.

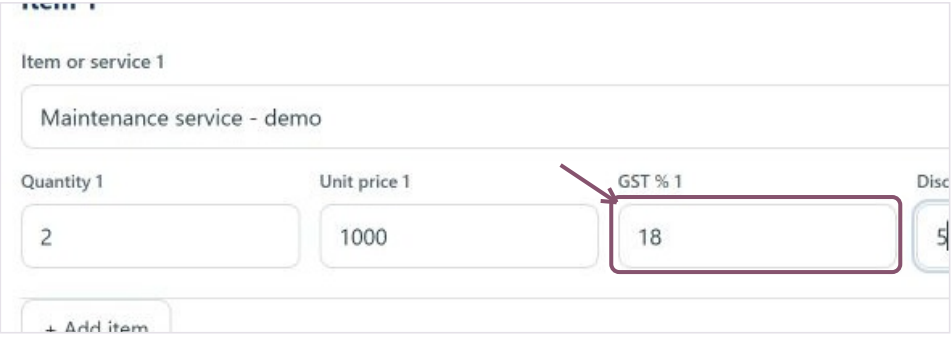
Next: Quotation: items & review

QUOTATION / STEPS 2-3 OF 3

Business user

Quotation: items & review

1. At **Items & terms**, enter items, quantities, prices, GST and discounts. Choose the correct GST split. Prices here exclude GST.
2. Add scope, delivery/completion, payment terms and exclusions when needed. Review the total and offer validity.
3. At **Review**, choose orientation and select **Save quotation**. Open **Preview, print or download** on the saved record.



Actual application screen | Example data

REMEMBER
Saving a quotation does not use an invoice number or invoice allowance. Tax is not calculated on the separate Additional charge field; use an item line when that charge needs GST.

Next: Turn an accepted quotation into an invoice

QUOTATION / FOLLOW-UP

Business user

Turn an accepted quotation into an invoice

1. Share the quotation PDF through your chosen channel. Then use **Mark as shared** to record that action.
2. After receiving the customer's response, use **Record acceptance** or **Mark declined**. Read the confirmation carefully.
3. For an accepted, valid quotation, choose **Create invoice** and confirm. Check the resulting invoice before sharing it.



The quotation supplies the details. You confirm conversion, then check the new invoice. This does not collect payment.

REMEMBER
Sharing and acceptance are recorded by you; no message or acceptance request is sent automatically. Conversion uses the business invoice numbering and allowance. To change a shared, accepted or expired offer, use Copy to new draft; the original remains.

Next: Useful fixes before asking for help

HELP

Business user

Useful fixes before asking for help

1. **Cannot find an invoice?** Check the account/workspace and invoice number. Personal records are not automatically copied into a business team.
2. **Save not confirmed?** Keep the page and your entries. Read the message and retry only after checking the connection or reloading a conflicting record.
3. **Quotation needs changes?** Edit a Draft. For a shared, accepted or expired offer, use **Copy to new draft**.
4. **Need help?** Use Contact us. Include the screen, document number and message, with sensitive details removed.

REMEMBER
This guide explains the software. You choose the applicable tax treatment and check the finished document. Never send passwords, OTPs or full bank details to support.



YOU ARE READY WHEN

You know what to check before asking for help.

You have reached the end of this guide