Lekha — Counter Billing Guide

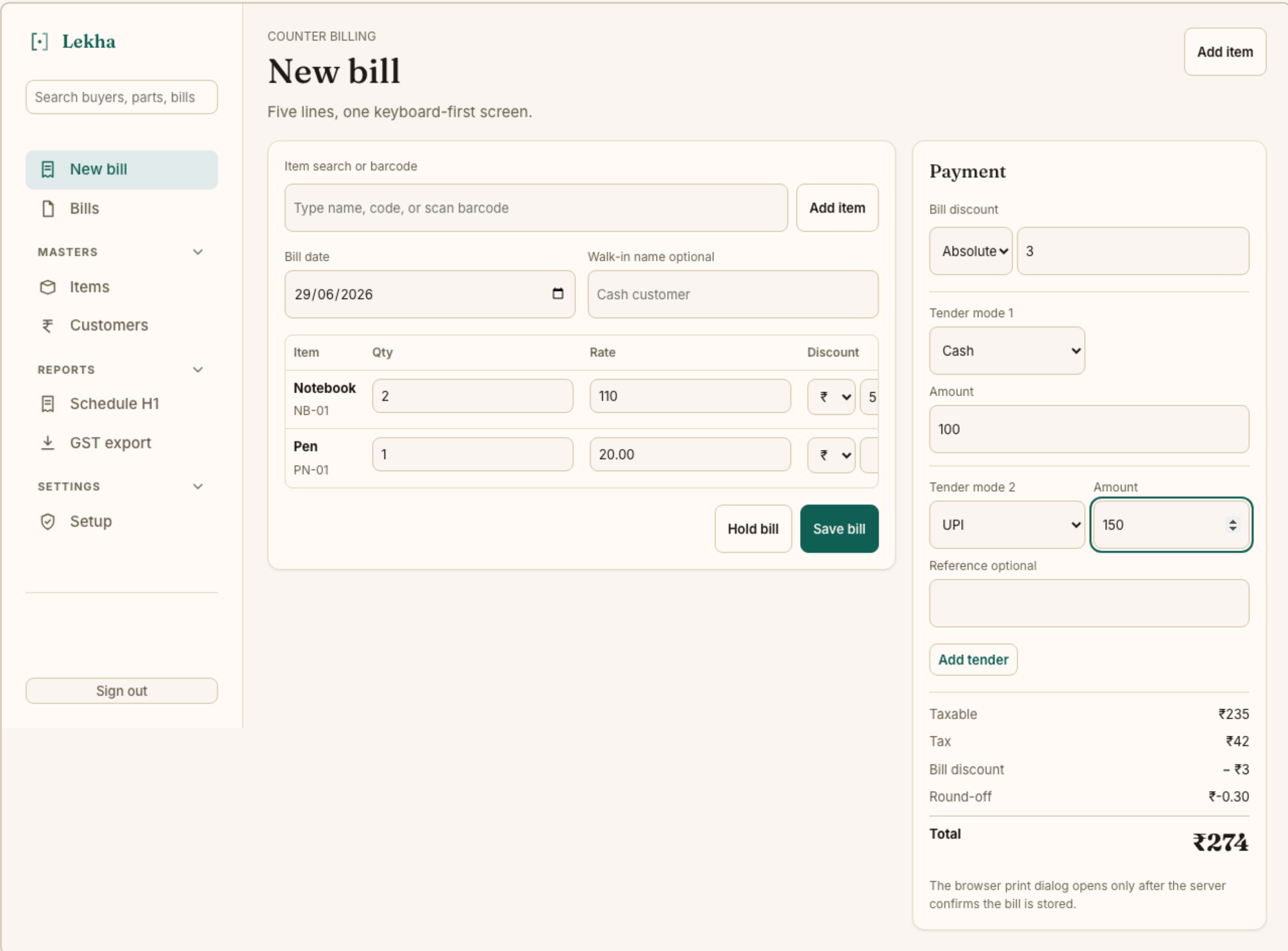
This is the plain-language guide to billing at your counter with Lekha. It walks through every screen: **where** to click and **how** to do each thing, step by step.

Lekha's counter mode does one job properly: **make a correct bill, fast, and keep a record of it.**

The one rule to remember: the bill number comes from the server, so **nothing prints until the record is saved.** A bill in your customer's hand that isn't in your records is the one thing this must never do. If the save is slow, wait for it — and if you press Save twice, you still get **one** bill with **one** number.

This guide is for shops billing over the counter — wholesale, retail, medical and jewellery. If you bill against purchase orders with delivery challans and month-end invoices, you want the **Owner's Guide** instead.

New bill — the screen you will live in



Where is everything? (quick reference)

I want to...	Go to
Make a bill	**New bill**
Find or reprint an old bill	**Bills**
Mark a bill paid	**Bills** → open the bill → **Mark paid**
Cancel a bill I just made	**Bills** → open the bill → **Cancel**
Correct a bill from an older day	**Bills** → open the bill → **Credit note**
Add or edit what I sell	**Masters → Items**
Bring in my item list from Excel	**Masters → Items → Import**
Bill a business (GST)	**New bill** → tick **Bill to a business**
Add a customer on purpose	**Masters → Customers**
Add medicine batches and expiry	**Masters → Items** → open the item → **Batches**
Add jewellery pieces and HUID	**Masters → Items** → open the item → **Pieces**
Change my shop details or GSTIN	**Settings → Setup**
Change print size	**Settings → Setup**
Show the drug inspector my record	**Reports → Schedule H1 register**
Give my CA the monthly GST file	**Reports → GST export**
Change my password / turn on 2FA	**My name (bottom of sidebar) → Account**

1. Getting started

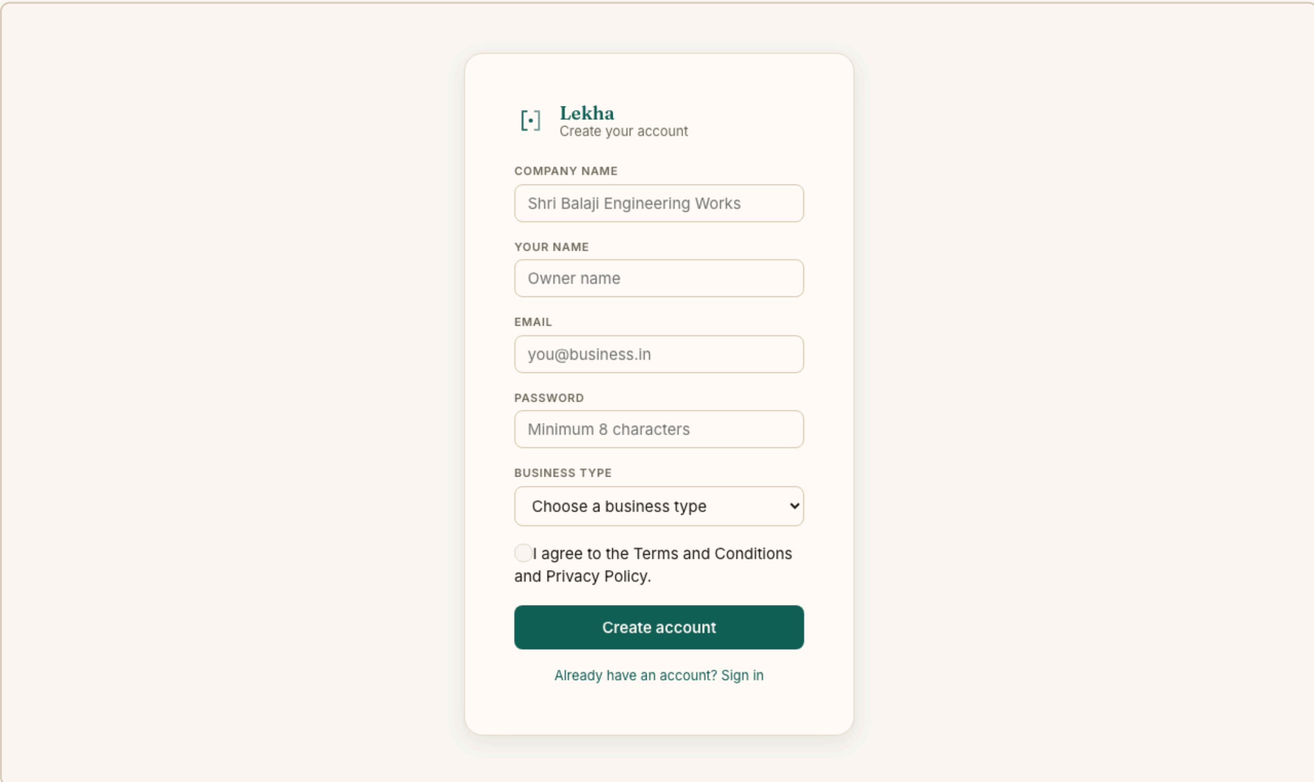
1.1 Create your account

1. Open **Sign up** on the Lekha website.
2. Fill in **Company name**, **Your name**, **Email** and a **Password** (at least 8 characters).
3. Under **Business type**, pick what you run — **Wholesale counter**, **Retail shop**, **Medical store**, **Jewellery shop**, or **Other counter shop**.
4. Tick **"I agree to the Terms and Conditions and Privacy Policy."**
5. Click **Create account**.

Your business type is what turns on the right fields for your trade — batch and expiry for a medical store, HUID and metal rate for a jeweller. Pick the closest one; support can change it later.

Every account starts with a **15-day free trial** — everything works, nothing is held back. When it ends Lekha becomes **read-only**: you can still see and print everything, and new bills wait until you upgrade. Your records stay yours either way.

Create your account



1.2 Set up your shop (`Settings → Setup`)

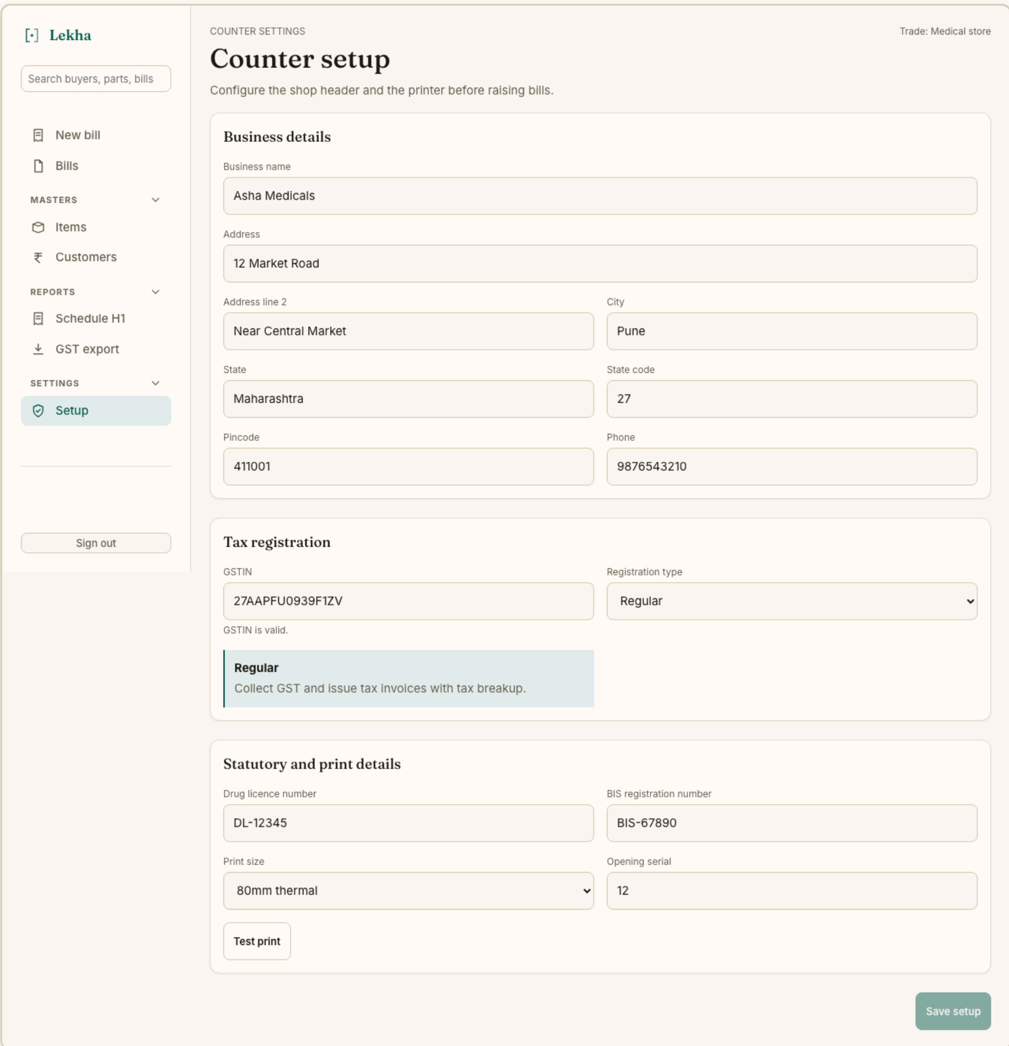
Do this once, before your first bill. It decides what your bills legally say.

1. **Business details** — shop name, address, state and phone. These print on every bill.
2. **GSTIN** — type it and Lekha checks it as you go. **A wrong GSTIN spoils every bill and every GST file you send your CA**, so it is worth getting right now.
3. **Registration type** — **Regular**, **Composition**, or **Unregistered**.
4. **Trade fields** — a medical store enters its **drug licence number**; a jeweller enters its **BIS registration**.
5. **Print size** — 2-inch or 3-inch thermal roll, or A4. Run a **test print** and check paper actually came out before you finish.
6. **Opening bill number** — only if you are moving to Lekha mid-year and want to carry on from your last number.

No GSTIN? That is fine. Plenty of counter shops are not registered. Leave it blank and Lekha issues a plain bill with no tax on it — it will not pretend you are registered.

About Composition: if you tick it, your bills carry no tax and say so. Getting this wrong invalidates bills you have already given customers, so confirm it with your CA. Changing it later needs support.

Counter setup



2. What you sell, and who you sell to

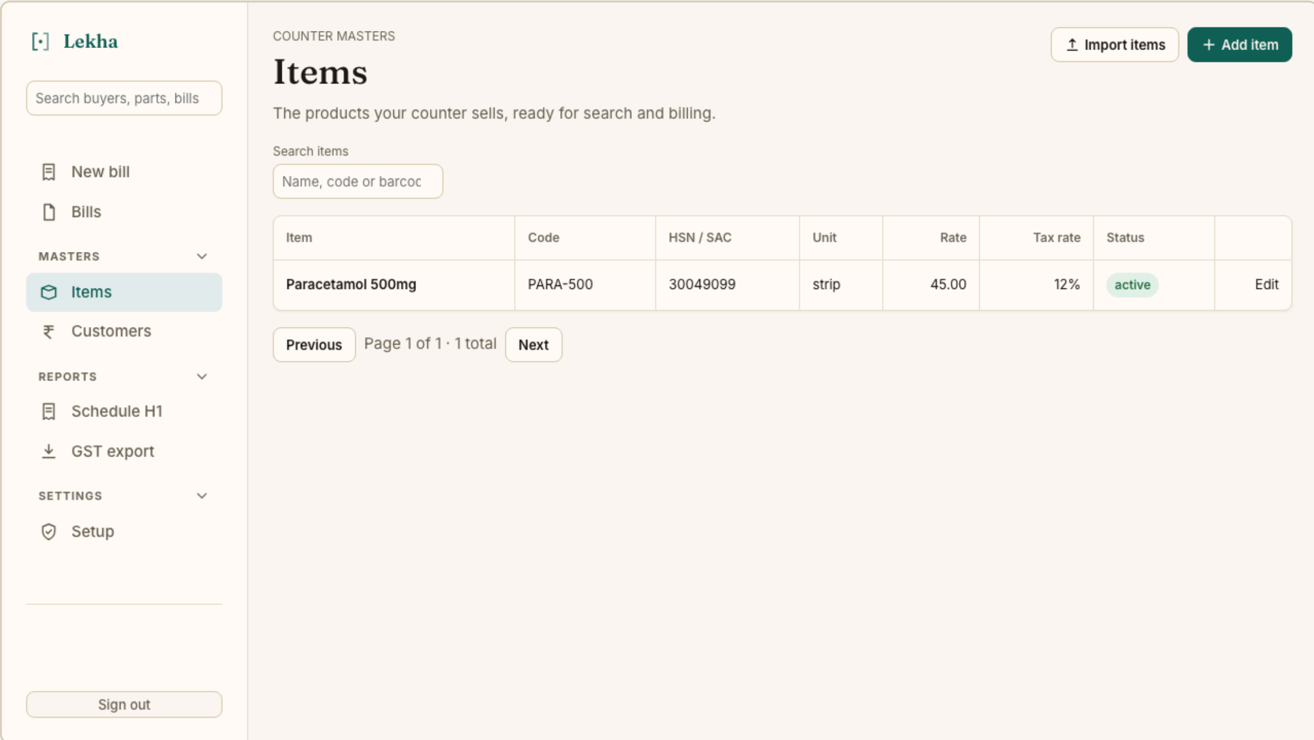
2.1 Items (`Masters → Items`)

An item is one thing you sell. Each needs a **name**, a **rate**, and — if you are GST-registered — an **HSN/SAC** code and a **tax rate**.

To add one: **Masters → Items → Add item**, fill it in, **Save**.

You can also add an item **without leaving a half-finished bill** — see §3.2.

Items



2.2 Bringing your item list in from Excel

Typing a thousand items is not a plan. **Masters → Items → Import**:

1. Choose your **CSV or XLSX** file.
2. Lekha reads the column headings and asks which of your columns is the name, the rate, the unit and the tax — because nobody's spreadsheet uses our names.
3. **Preview** shows what will come in and lists any bad rows with the reason.
4. Nothing is saved until you press the button on that preview. If some rows failed, download the error file, fix those rows, and import again.

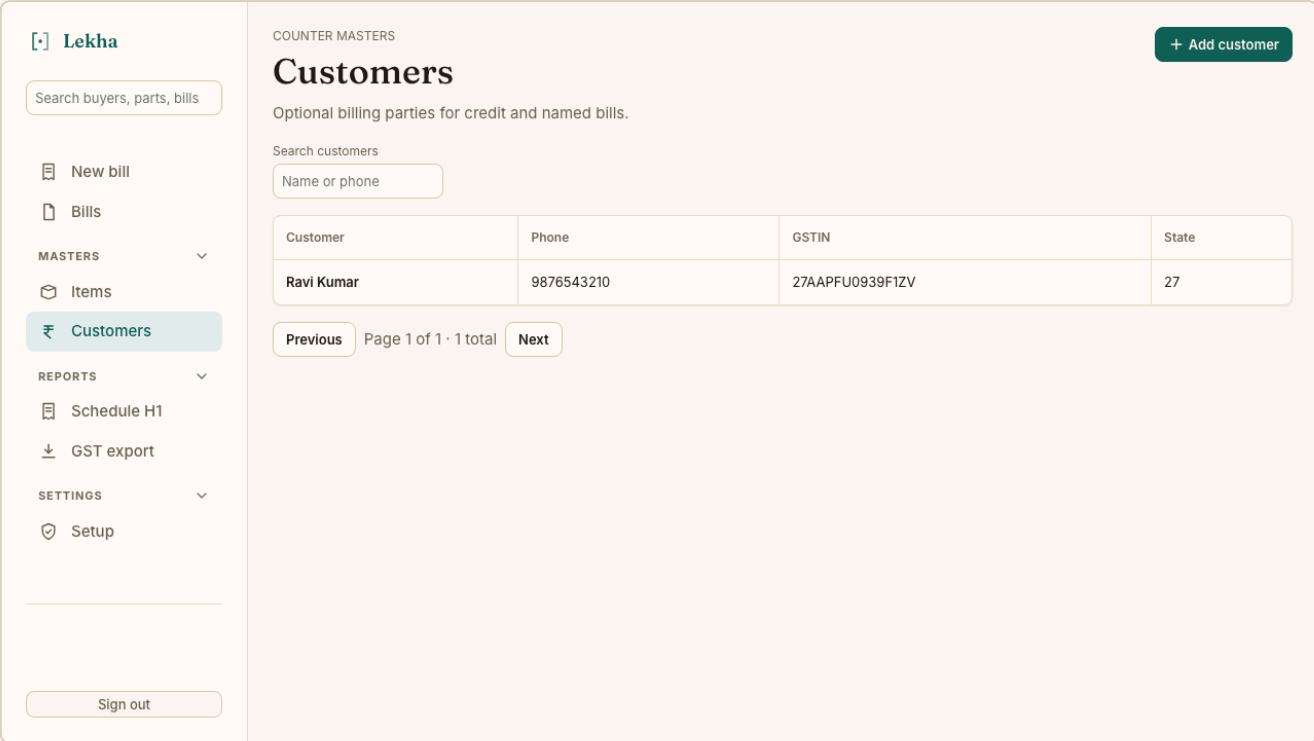
Customers import the same way.

2.3 Customers (`Masters → Customers`)

You do not need to set customers up in advance. Most counter sales are to a walk-in — type a name, or leave it blank. And if the person in front of you wants a GST bill, you take their GSTIN **at the counter** while billing (§3.5); Lekha saves them for you automatically. Nobody sits and enters customers before opening the shop.

This screen is for looking at the customers you have collected, and for the handful you want to add on purpose — a regular credit customer, say. **Masters → Customers → Add customer**; a name on its own is enough, phone is optional.

Customers



3. Making a bill (`New bill`)

This is the screen that matters. The aim is five lines in under thirty seconds without touching the mouse.

3.1 The basic bill

1. Open **New bill**. The cursor is already in the item box.
2. Type a few letters of the item name, or **scan the barcode**. Matches appear as you type — Lekha searches the list it already holds, so it never waits on your internet.
3. Press **Enter** on the right one. It goes on the bill with **quantity 1**.
4. Type over the quantity if it is more than one.
5. Repeat for each item.
6. Choose how they paid — **Cash**, **Card**, **UPI** or **Credit**. The amount fills in as the total.
7. Press **Save**. The bill number comes back, the bill prints, and the screen clears for the next customer.

Split payment: if they pay part cash and part UPI, add both — the bill records each.

3.2 The things that actually happen at a counter

The item isn't in your list. Add it right there from the billing screen. Your part-finished bill stays exactly as it is.

You agreed a different price. Type over the rate on the line. Lekha records that it was changed, so you can see it later.

Wrong line. Remove it before you save. **After you save you cannot** — a saved bill is a legal document, and §4 covers how to correct one properly.

The customer wanders off mid-bill. Use **Hold**, serve the next person, and pick the held bill back up when they return.

You pressed Save twice. You get one bill and one number. Press it again if you are unsure.

The internet drops. Lekha will not give you a number it hasn't saved. You will see it retry; if it cannot save, nothing prints. Wait, or take the sale on paper and enter it after.

Two counters at once. Both can bill at the same time. Numbers never collide and never skip.

3.3 When the customer wants a GST bill

A business buying from you needs its **GSTIN on the invoice** to claim the tax back. You do not go and create a customer first:

1. On **New bill**, tick **Bill to a business (GST)**.
2. Type the **business name** and their **GSTIN**.
3. Carry on and save as normal.

Lekha checks the GSTIN as you type — a wrong one is refused before the bill is saved, because a wrong GSTIN on an invoice is worse than no invoice. The business is then **saved as a customer automatically**, so next time you start typing you will not need the GSTIN again.

One thing to expect. If the GSTIN is from **another state**, the bill is taxed as **IGST** instead of CGST/SGST. That is correct — an inter-state sale is taxed that way — but if you are used to seeing CGST and SGST on every bill, this will look different. Nothing is wrong.

For an ordinary cash sale, ignore all of this and leave the box unticked.

3.4 If you run a medical store

1. Pick the medicine as usual.
2. Pick the **batch** from that item's batch list. The batch number and expiry attach to the line and print on the bill.
3. Save and print.

Always pick the batch, never type it. The batch and expiry are the exact things a drug inspector checks, and typing them at a busy counter is how they end up wrong.

- Selling from two batches? Put it on **two lines**, one per batch.
- Picked an **expired** batch and Lekha will stop you. This is one of the very few places it blocks outright.
- A batch that is finished but still showing — mark it **closed** so it stops appearing.
- For a **Schedule H or H1** medicine, Lekha asks for the **prescriber, patient and prescription reference**. That is what fills your H1 register (§5.1).
- **No prescription in hand?** The sale still goes through, flagged as prescription-pending, and shows up on a list for you to clear. It is recorded either way.

3.5 If you run a jewellery shop

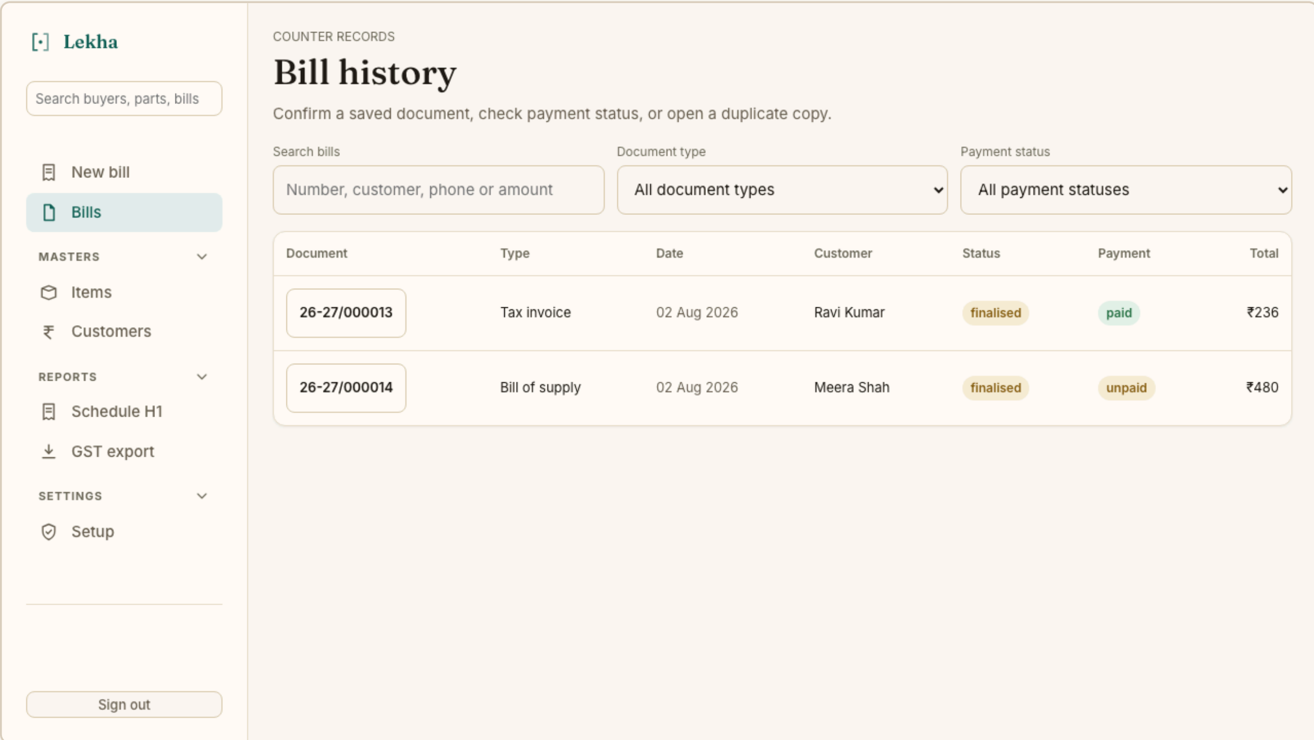
1. Set or confirm **today's metal rate** at the top. You set your own counter rate — typing it in is the normal way, not a fallback.
2. Pick the **piece**. Its HUID, purity and weight come with it.
3. **Net weight** works out as gross weight less stone weight. Making charges apply as that item is set up.
4. Tax is worked out separately on the metal, the making and the stones, all on one line — because they are taxed at different rates.
5. Add **old gold** the customer is exchanging. It comes off what they owe.
6. Save and print. The HUID is on the invoice.

- Changed your rate at midday? Every earlier bill keeps the rate it was made at. Nothing is re-priced behind you.
- Old gold worth **more** than what they bought is fine — the bill shows an amount payable to the customer.
- No HUID on an old piece? Leave it blank. It is optional per piece.
- A piece leaves the list the moment it is sold, so it can never be billed twice.

4. After the bill (`Bills`)

Bills is every bill you have made. Search by number, filter by type or by paid/unpaid, or pick a date range.

Bill history



4.1 Getting paid

Open the bill and press **Mark paid**. The unpaid filter on **Bills** is your "who owes me" list.

Part-payments are not in this version — a bill is paid or it isn't.

4.2 Reprinting

Open the bill and press **Print**. It reprints exactly what you gave the customer the first time. Reprinting never changes a bill or its number.

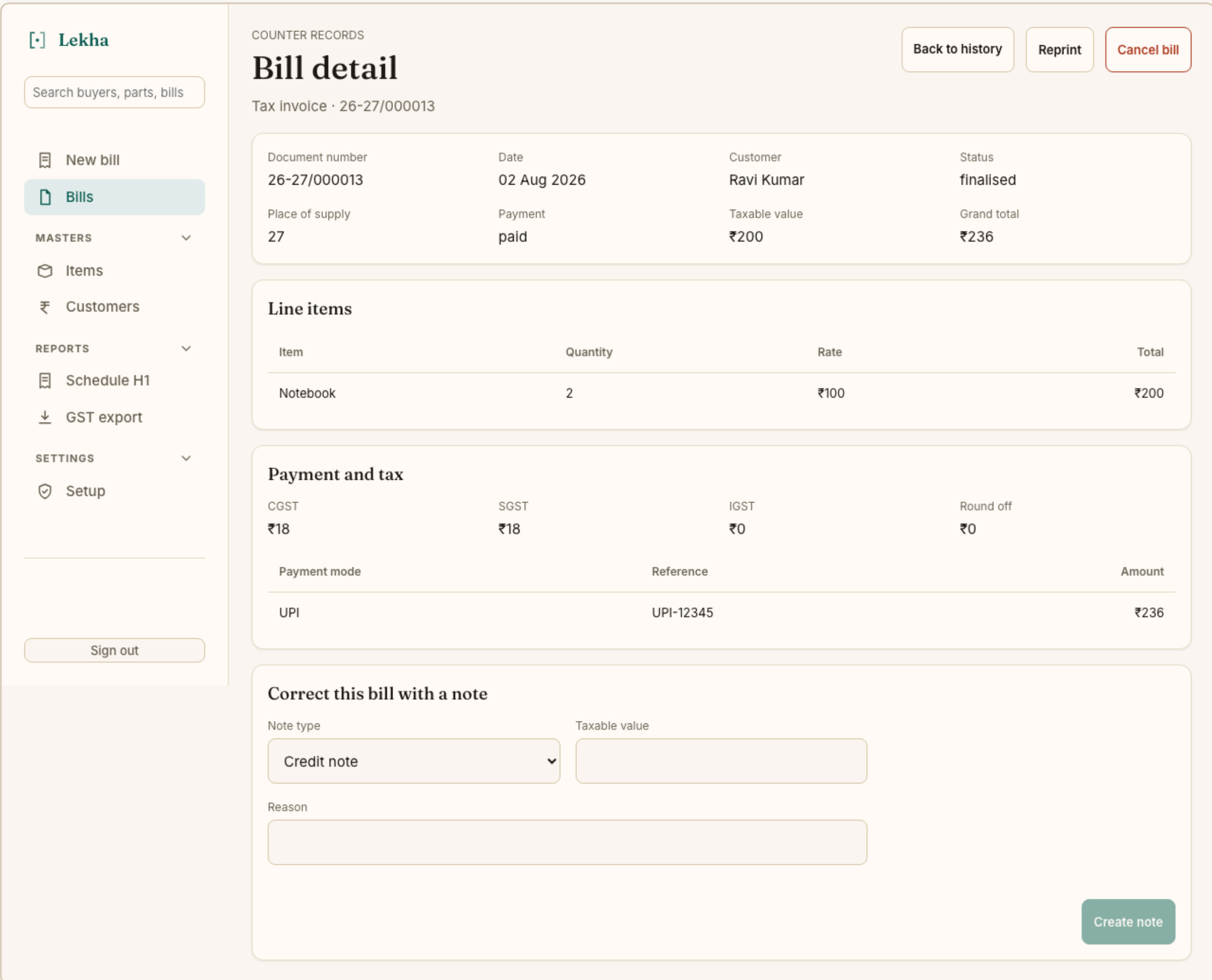
4.3 Fixing a mistake

Which one you use depends on **when**:

- **Same day, and you made it by accident** — open the bill and **Cancel** it, with a reason. It stays visible, marked cancelled, and its number is not reused.
- **Any later day, or the customer returned goods** — issue a **Credit note** against the bill (or a **Debit note** if they owe you more). The original bill is never edited.

Why not just change the bill? Because your customer already has a copy and the tax department already counts it. A note is the legal way to correct it, and it keeps both halves of the story.

Bill detail — print, mark paid, cancel, credit note



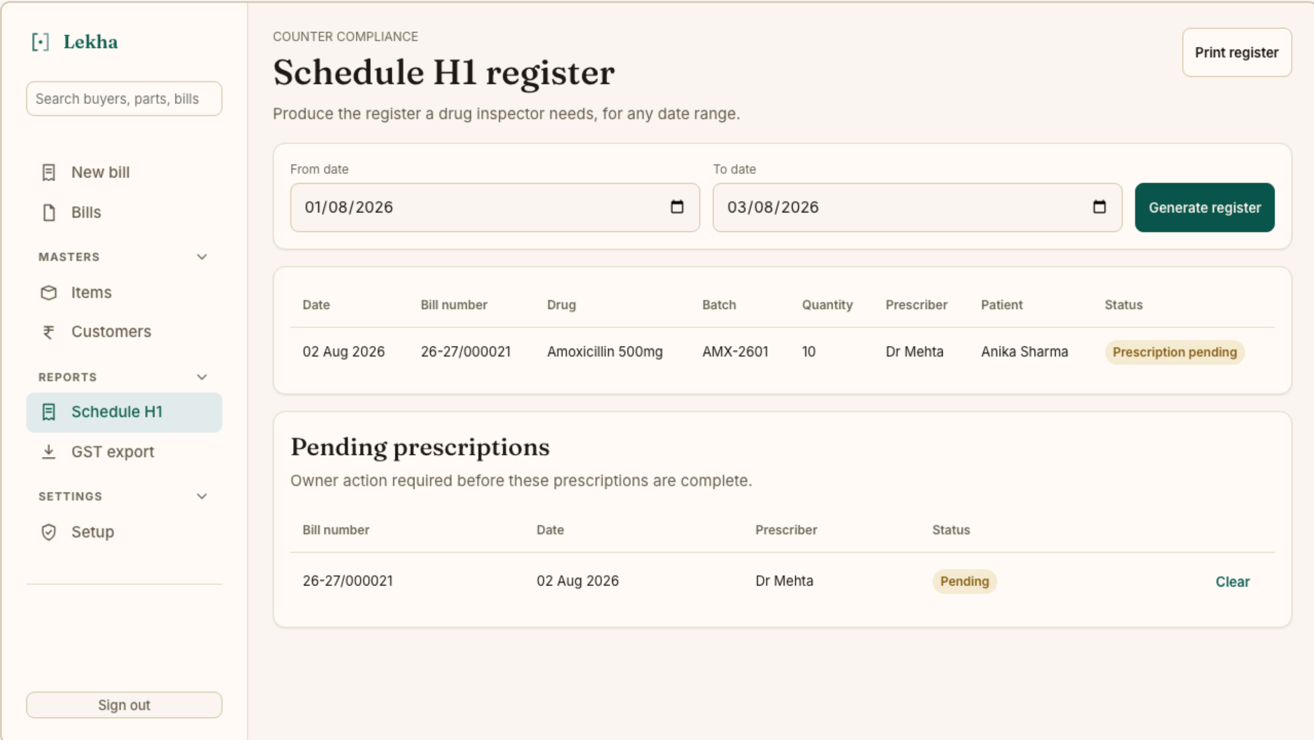
5. Month-end and inspections

5.1 Schedule H1 register (`Reports → Schedule H1 register`)

Medical stores only, and legally required. Every Schedule H1 sale is here with its date, bill number, medicine, batch, quantity, prescriber and patient — filled in from what you entered while billing, so there is no separate register to keep.

Pick a **From** and **To** date and print it. When a drug inspector asks, this is the answer.

Schedule H1 register



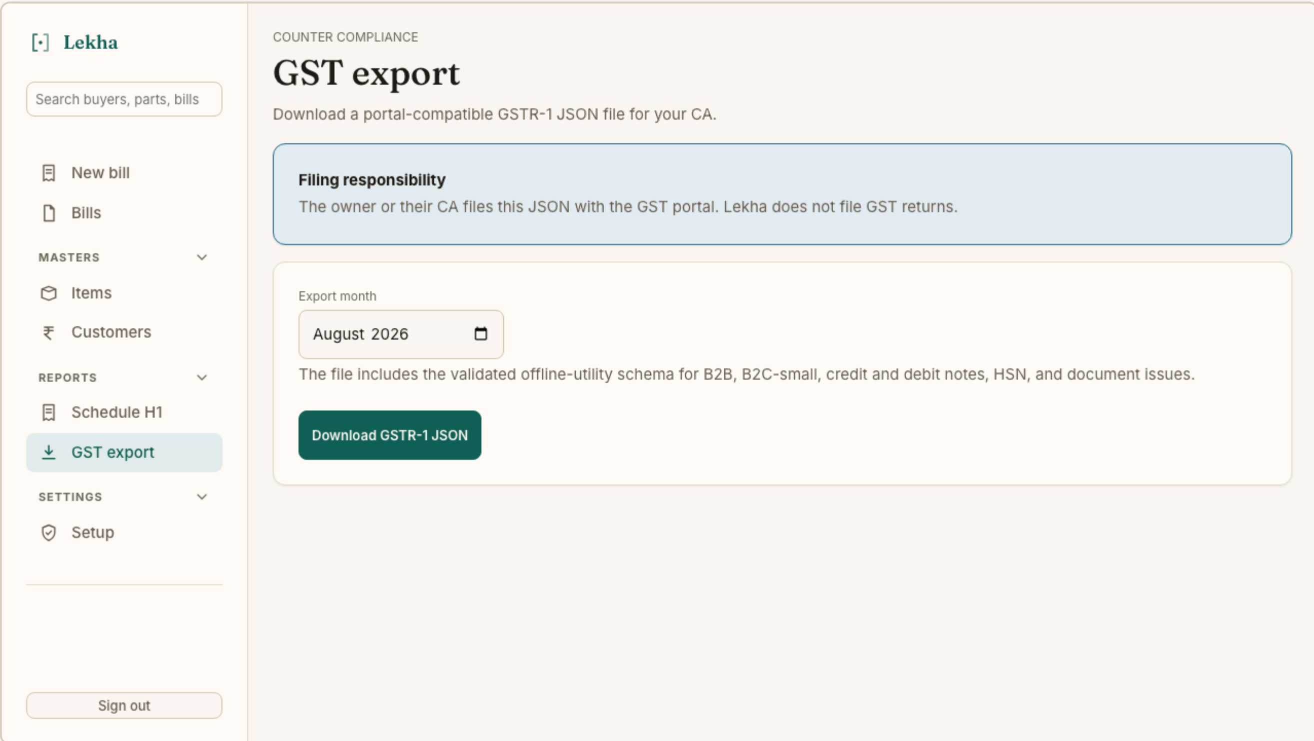
5.2 The monthly GST file (`Reports → GST export`)

1. Choose the **month**.
2. Press **Export**.
3. Send the file to your CA, or upload it yourself.

It lists your bills for that month in the layout the GST utility expects, including any credit and debit notes.

This is a file, not a filing. Lekha does not submit anything to the GST portal and does not decide what you owe. Your CA still does that.

GST export



6. Getting help

- **Settings → Support → New ticket** for anything you are stuck on.
- **My name (bottom of sidebar) → Account** to change your password or turn on two-factor sign-in.

7. What Lekha does not do (so you're never surprised)

- **It never moves money.** "Mark paid" records the cash, card or UPI you already took. No transfer happens.
- **It is not your CA.** It records what you enter and does not decide your GST position.
- **It does not track stock counts.** It bills what you sell; it does not tell you what is left on the shelf.
- **Medical batches are a list to pick from, not a quantity.** Mark a batch closed when it runs out.
- **No customer ledger yet.** Paid or unpaid is the answer today; there is no ageing and no part-payment.
- **It is not a filing service.** The GST export is a file for your CA. Lekha never submits on your behalf.