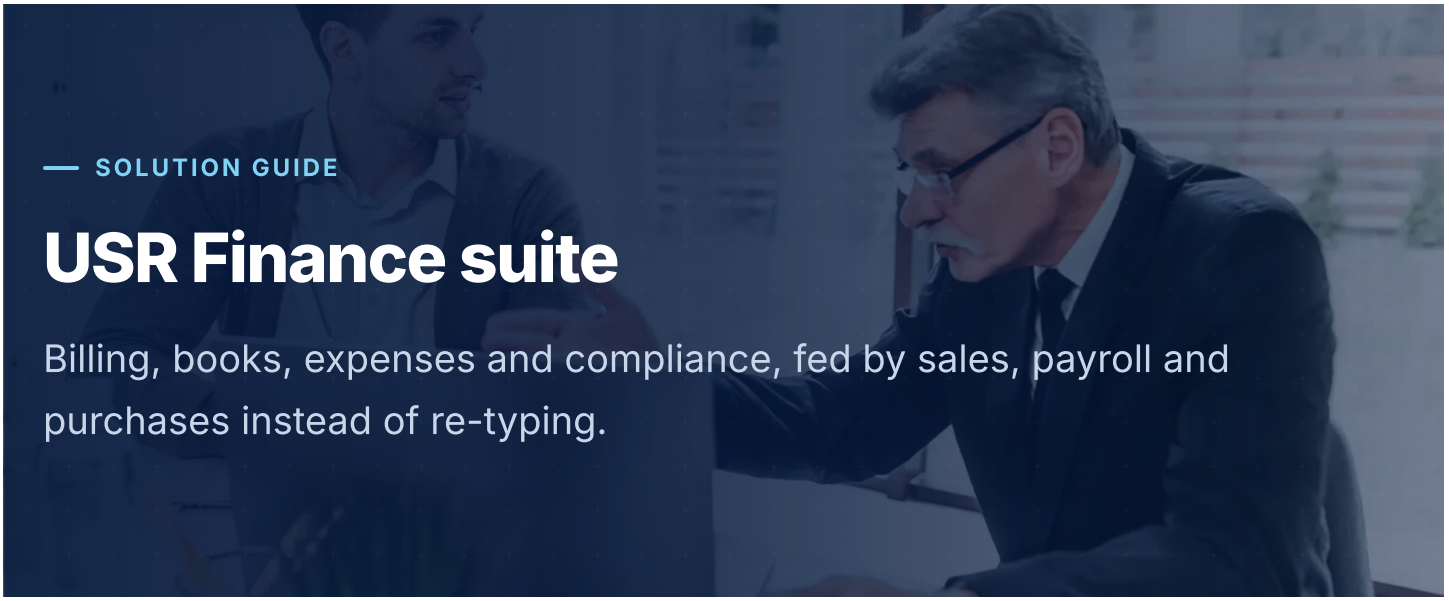
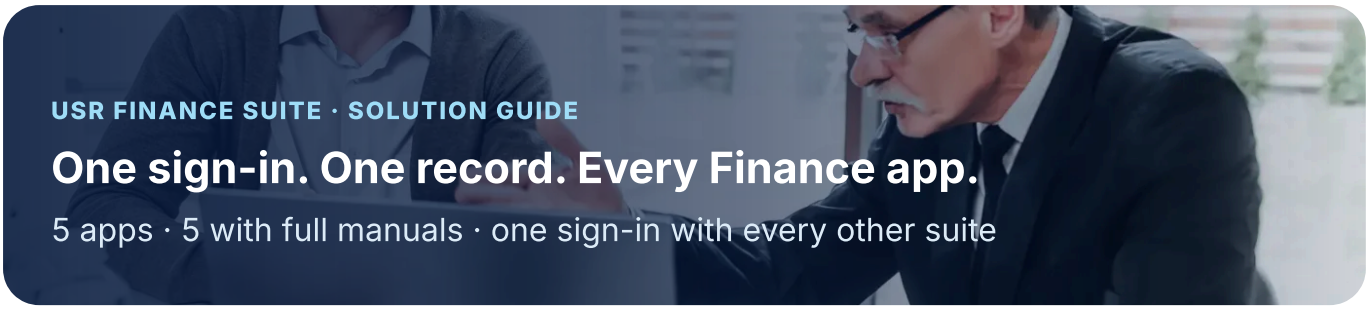


— SOLUTION GUIDE

USR Finance suite

Billing, books, expenses and compliance, fed by sales, payroll and purchases instead of re-typing.



USR FINANCE SUITE · SOLUTION GUIDE

One sign-in. One record. Every Finance app.

5 apps · 5 with full manuals · one sign-in with every other suite

5 apps in this suite	**5** with full user manuals
1 sign-in for all USR apps	**5** suites sharing one record

⬇ Download this guide (PDF)

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APPS IN THE FINANCE SUITE

What each app does

USR Billing

Subscriptions and invoices

✔ **Step-by-step help**

USR Books

Accounts, GST and TDS

✔ **Step-by-step help**

USR CA Desk

Tools for CA firms: due dates and client portal

✔ **Step-by-step help**

USR Expense

Claims with receipts, approvals and hand-off

✔ **Step-by-step help**

USR Tally

Two-way TallyPrime sync

✔ **Step-by-step help**

> Step-by-step help for every app, by role, is in the USR Help Centre. Your OKR Stars expert walks you through it at training.

HOW THE DATA CONNECTS

One sign-in, one record, no re-typing

Your team signs in once to USR One. Every Finance app, and every app in the other suites, uses the same people, customer, vendor and item records.

From	To	What moves, automatically
USR Billing	USR Books	Invoices and receipts post to the ledger
USR Expense	USR Books	Approved claims post with the right cost centre
USR HRMS (People)	USR Books	Payroll journal posts each month
USR Books	USR CA Desk / USR Tally	Your CA gets the data, or you keep using Tally side by side

Same sign-in, same record: each step happens without exports or re-typing.

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DEPARTMENT AUTOMATION

What runs on its own

WHEN	**Invoice overdue**	→	Reminder to the customer and the account owner
WHEN	**Expense claim submitted**	→	Policy check, manager approval, then payment queue
WHEN	**Month end**	→	Checklist of open items before you close
WHEN	**GST and TDS due dates**	→	Reminders to finance and your CA
WHEN	**Purchase bill received**	→	Matched to the purchase order and goods receipt

WHERE AI HELPS

AI drafts. Your people decide.

✨ Receipt reading

Expense details read from a photo of the bill

✨ Anomaly checks

Unusual spends and duplicates flagged before payment

✨ Plain-language reports

Ask 'why did costs go up this month?' and get the answer with figures

✨ Cash-flow view

Insights shows money in and out for the next weeks

USR Assist works inside the apps your users already have. See how OKR Stars uses AI in every service.

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QUICK START BY ROLE

Who does what in week one

Accountant

Record invoices, bills and claims

Finance head

Approve payments, close the month

CA or auditor

Get reports and exports

More role lists on User manuals.

OFTEN ADDED NEXT

Grow from Finance to the whole company

💼 Sales suite →

Quotes from CRM become invoices

👥 People suite →

Payroll and reimbursements in one flow

⚙️ Operations suite →

Purchases and stock linked to bills

Solutions on usrinfo.tech: Lead to cash · Procure to pay · Compliance

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