Quick Start

Have you just installed Gestan on your PC? You've made a great choice!

You should be ready to create your first invoice in about 5 minutes. Shall we get started?

To help you get up and running quickly, this page outlines the standard settings for a new Gestan installation.

Follow the guide!



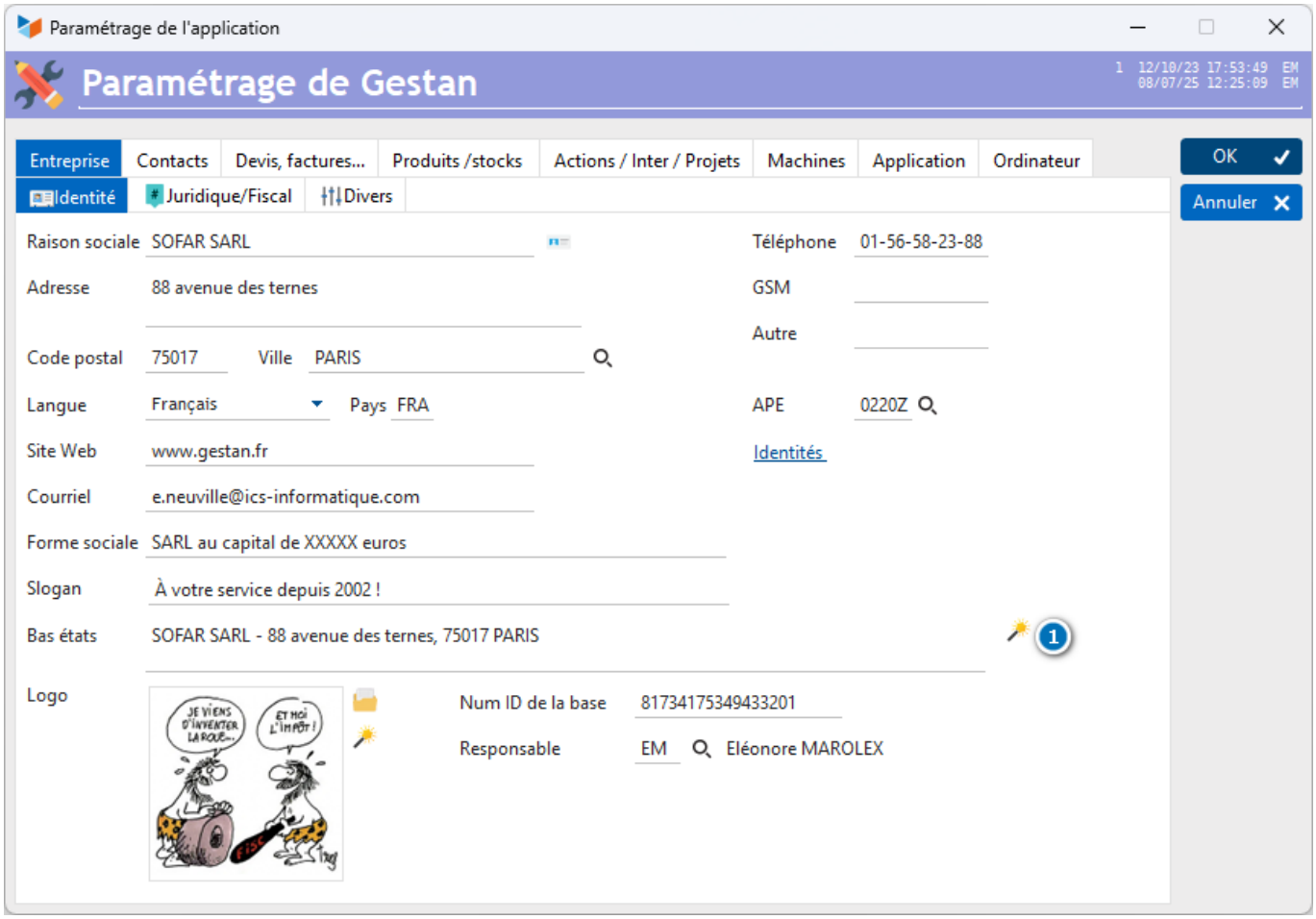
Fine-tuning general settings

The startup wizard asked for some basic information about your company, so the essentials should already be correct.

However, let's refine the settings a bit further. To do this, open the general settings screen by pressing the **F3** key or by going to **Tools → Settings → General settings**.

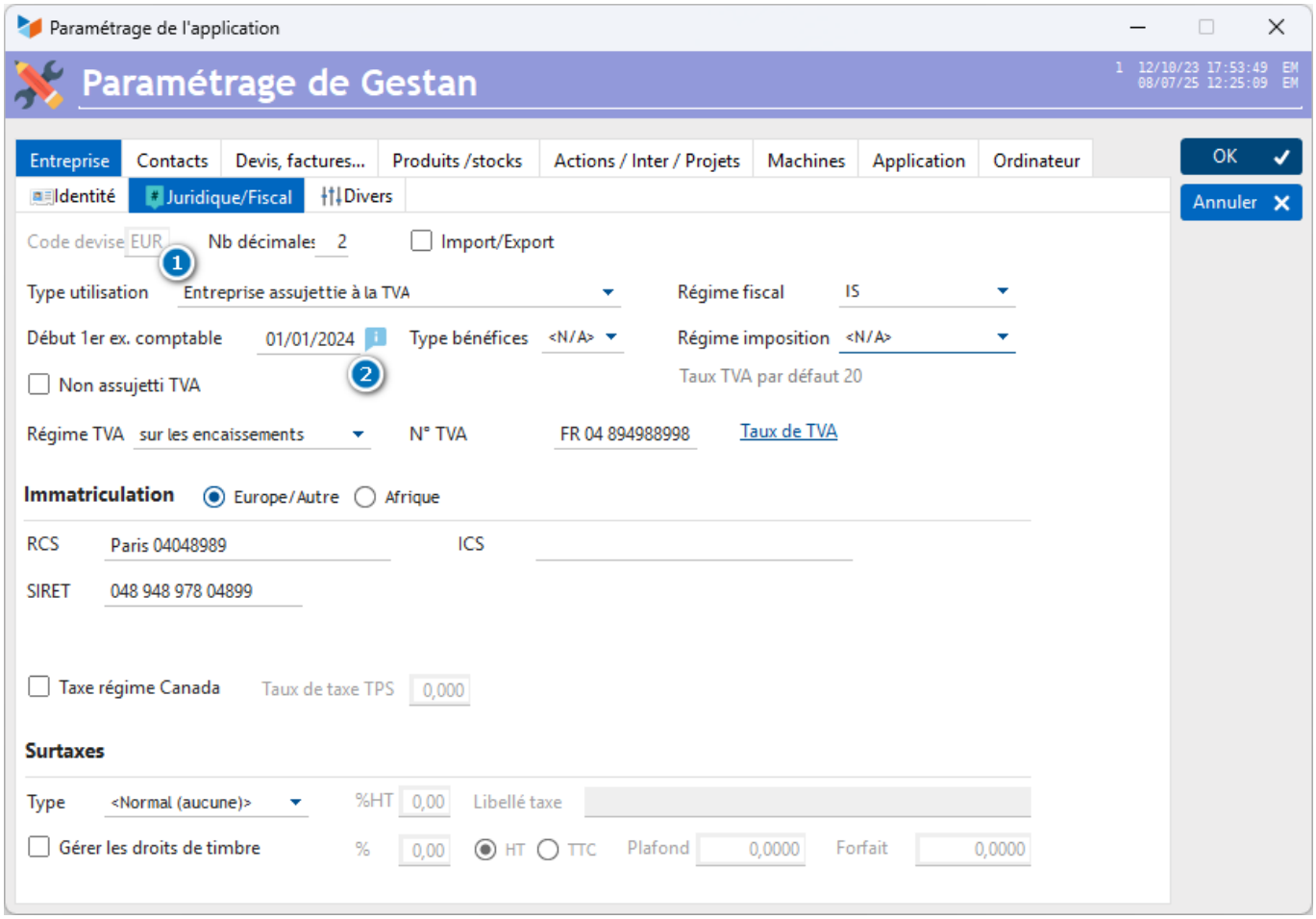
On the Company tab

On the **Identity** sub-tab, ensure your company's identification details are correctly entered.

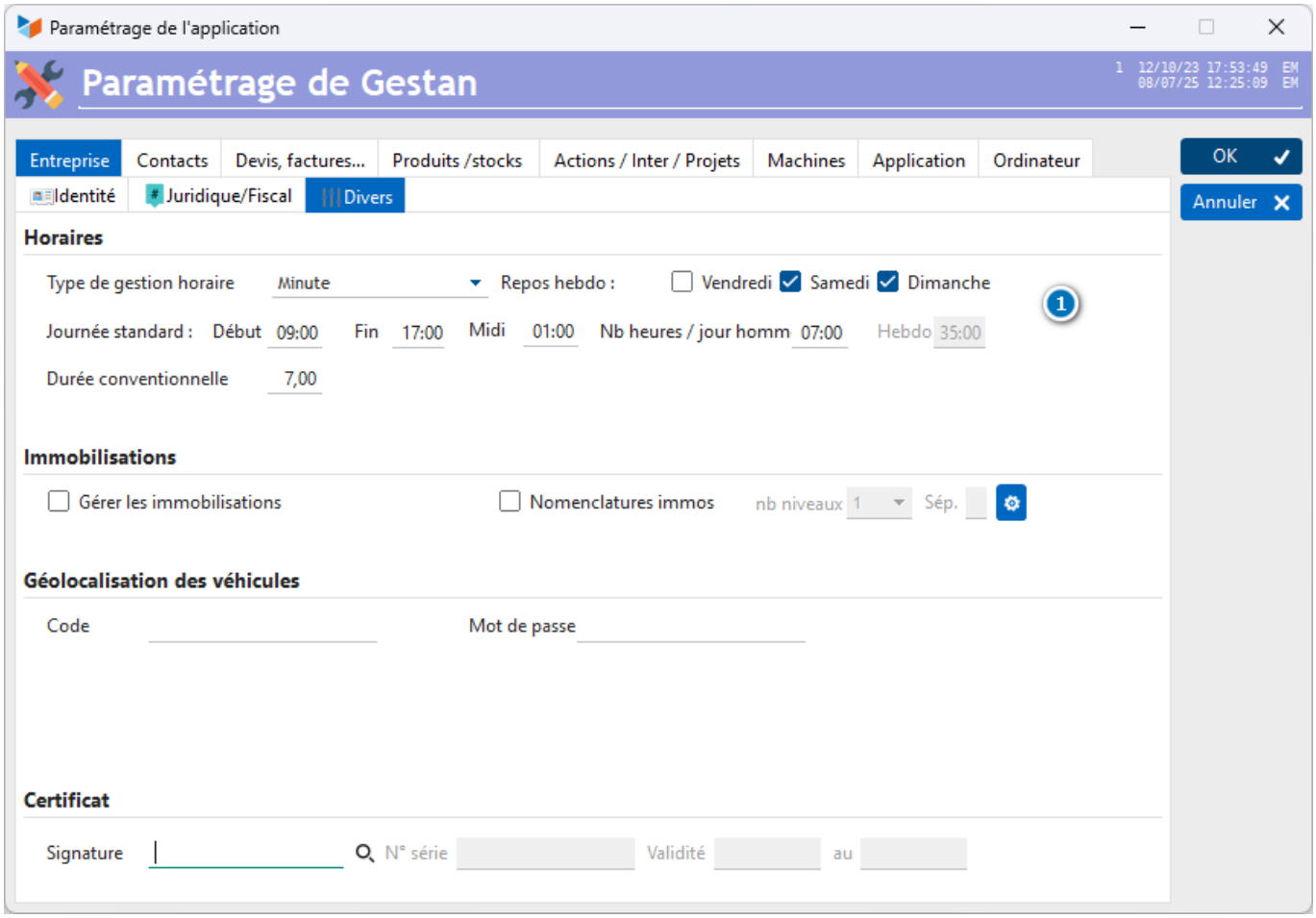


You can click the magic wand icon 1 to automatically fill in the text that will appear at the bottom of documents created in Gestan (customer lists, invoice lists, etc.).

On the **Legal/Tax** sub-tab, check that your currency 1 is correct. For the start date of the first fiscal year 2, use the start date of the first *full* fiscal year: for example, if you began operations on May 15, 2022, and close your accounts on December 31, enter 01/01/2022 (instead of 15/05/2022).



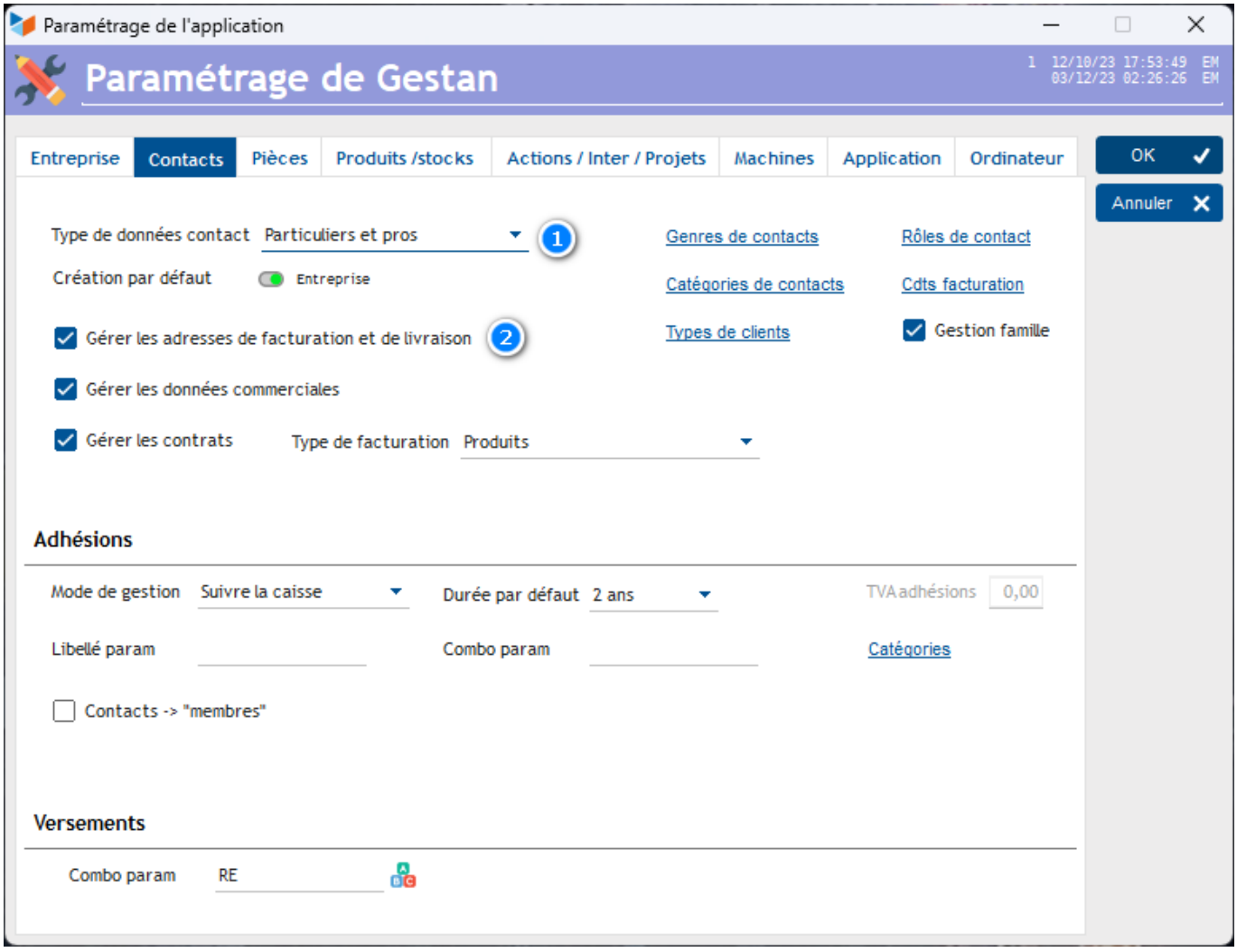
In the **Miscellaneous** sub-tab, verify that your business hours at 1 are correct.



More details on this tab: this page

On the Contact tab

Contacts include everyone you deal with: clients, prospects, partners, service providers, as well as general business contacts.



- Choose the type of data 1 you want to manage: business addresses, personal addresses, or both.
- Check the box 2 if you want to manage billing and delivery addresses that may differ from your business or personal addresses.

More details on contacts: this page

On the Quotes, Invoices tab

Sales documents include quotes, orders, invoices, credit notes, and delivery notes.

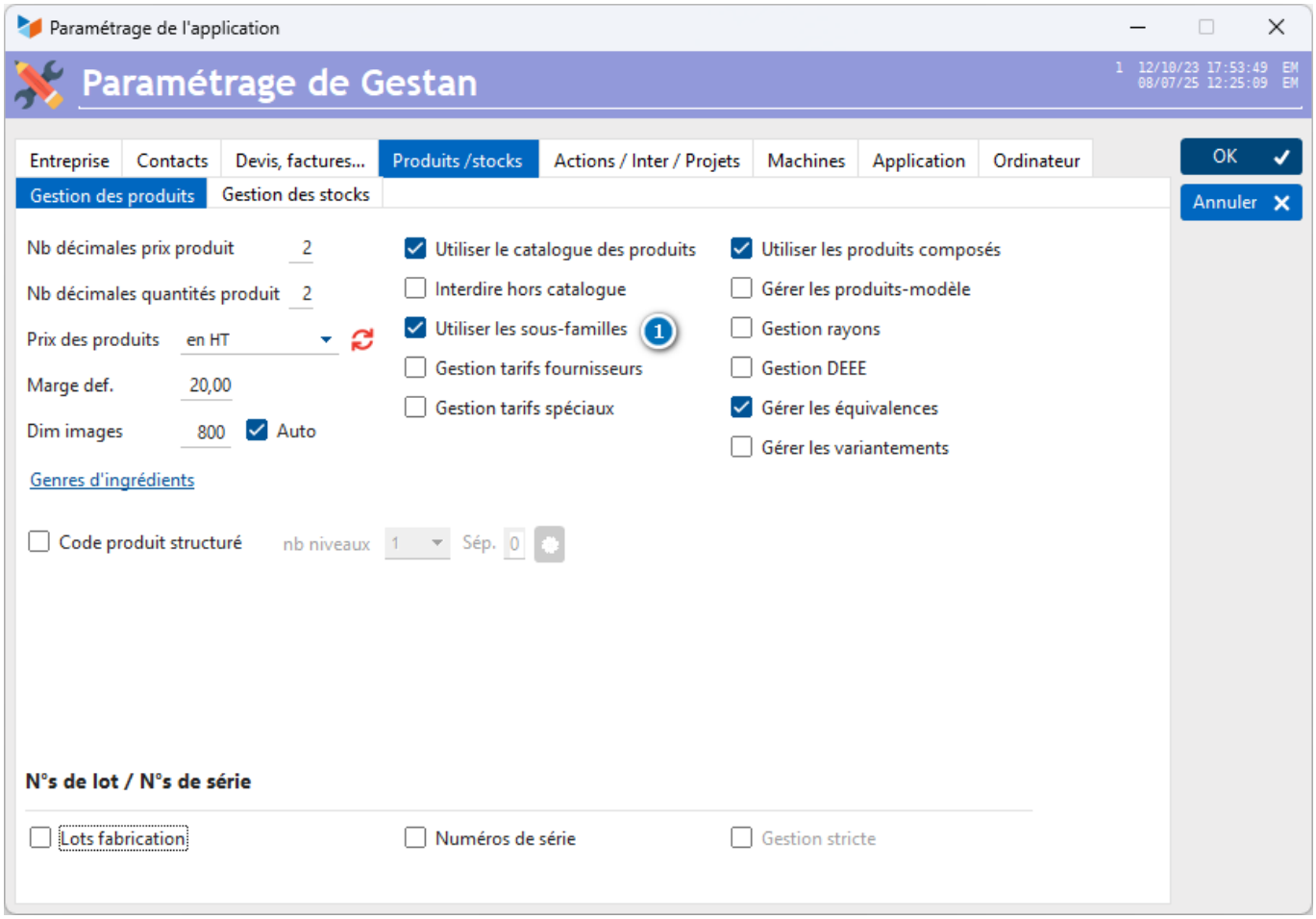
Purchase documents (supplier side) include requests for quotes, orders, invoices, credit notes, and goods receipt notes.



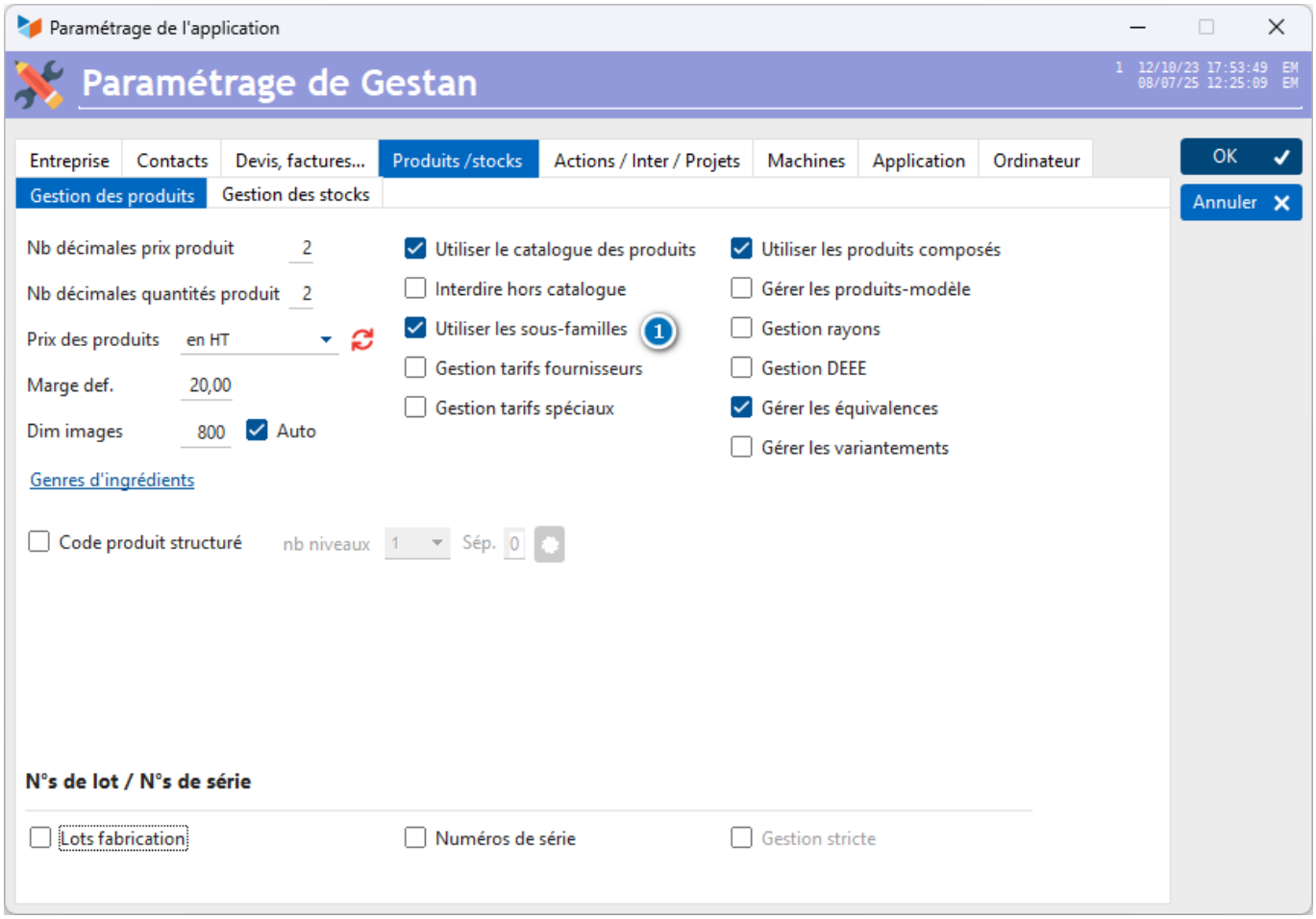
- In the **Footer** sub-tab, click the magic wand 1 to populate the text that should appear at the bottom of your quotes, invoices, and other sales documents. You can edit it as you wish. 📌 More details on purchase and sales documents: this page

On the Products/Stock tab

Products are the items you sell (and also those you buy).



- If you have a large number of products, check box 1 to manage them using categories and sub-categories (instead of just categories).



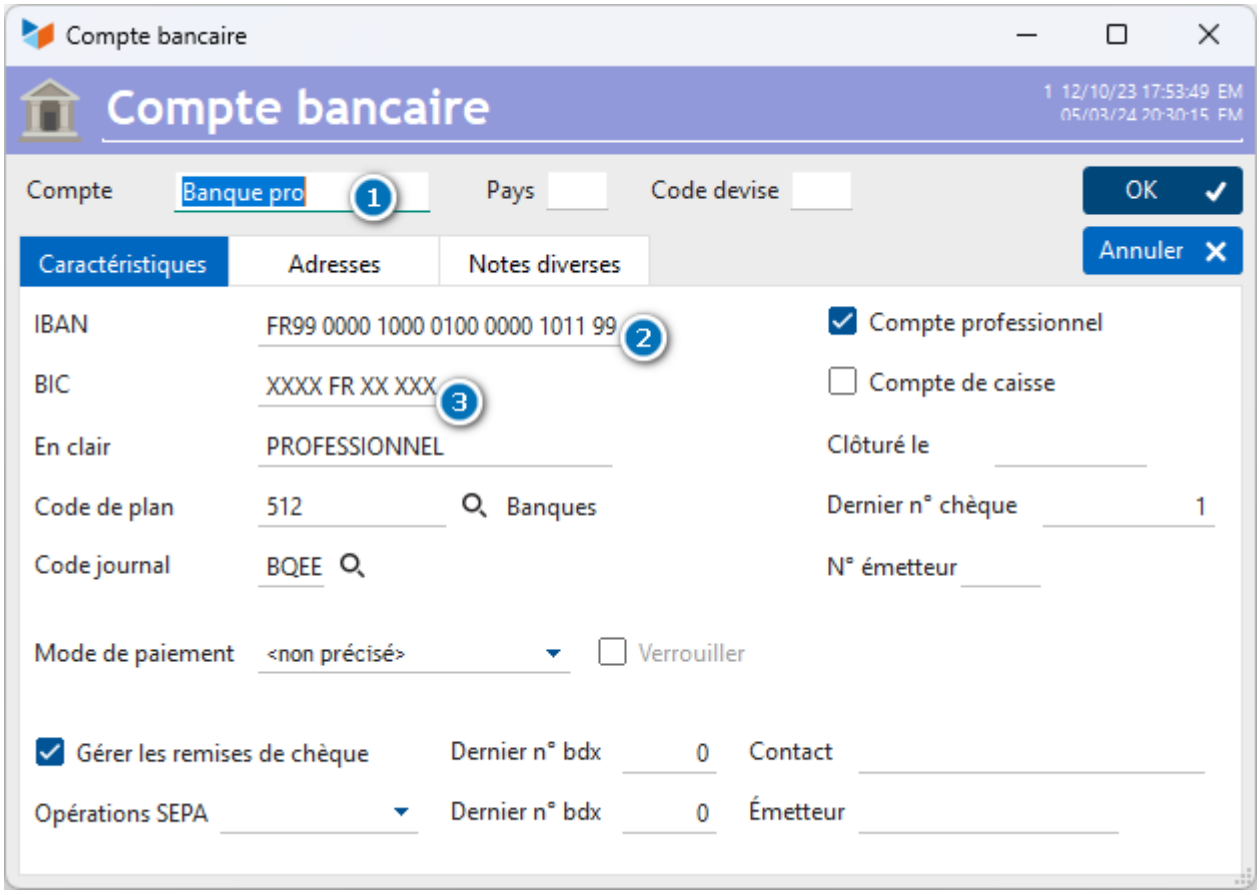
- Optionally, specify your stock management options 1

📌 More details on products: this page

Registering bank accounts

Go to **Accounting → Bank accounts** to open the list of bank accounts you will use for your business activities.

Open the “Business account” record created by the setup wizard with default data.



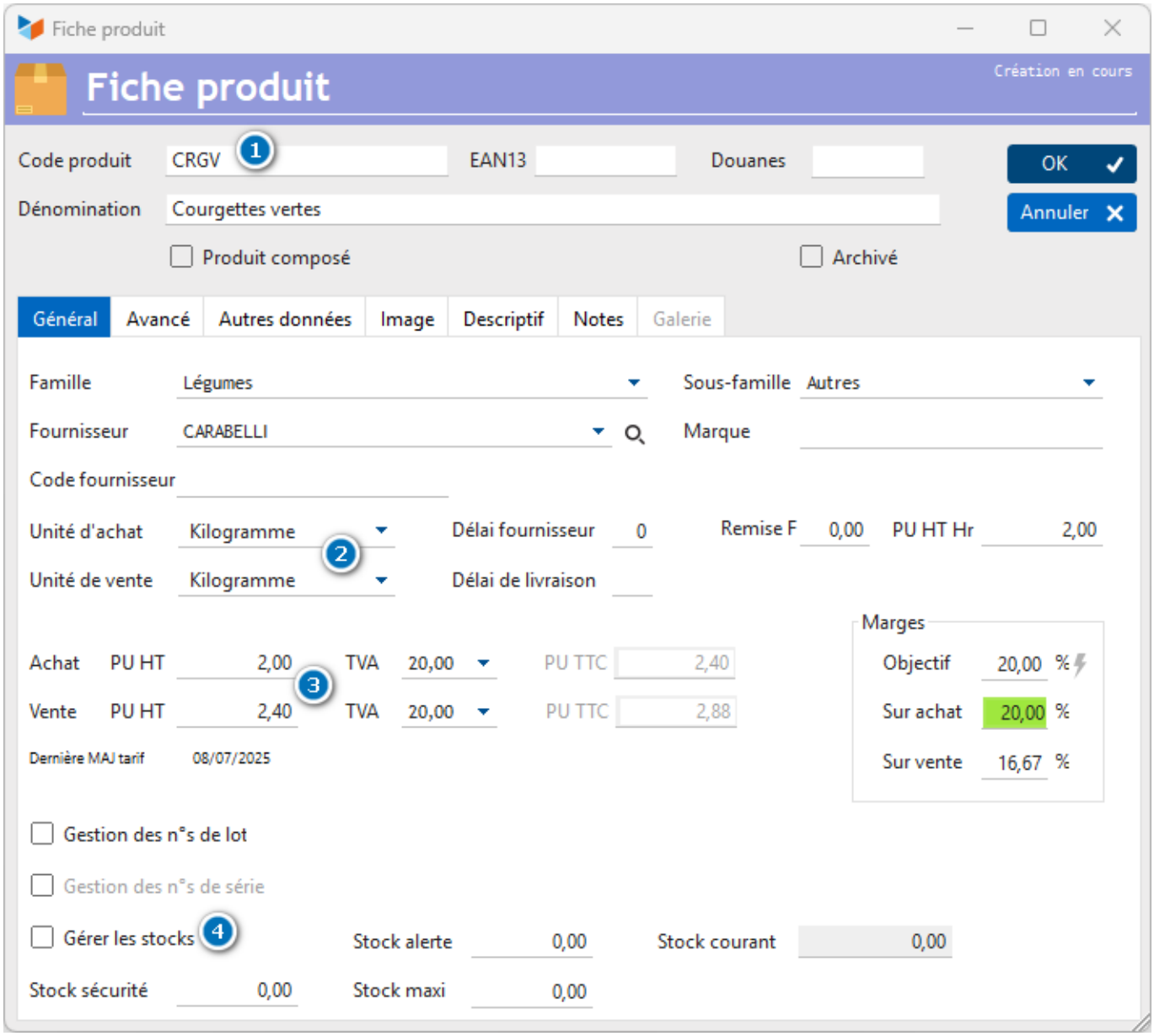
- Enter an easy-to-understand label 1 (e.g., “Business Bank”)
- Enter the IBAN 2
- Enter the BIC 3

You can add more accounts if you have several.

📌 More info on bank accounts: this page.

Registering a product

Go to the **Products → Products** menu, open the product list, and click the **New** button to register one of the products you sell.



- Enter a code and a descriptive name 1 for your product
- Specify a purchase and sales unit 2 (right-click to save new units).
- Enter a purchase price 3 and a sales price
- Specify whether you want to manage stock 4

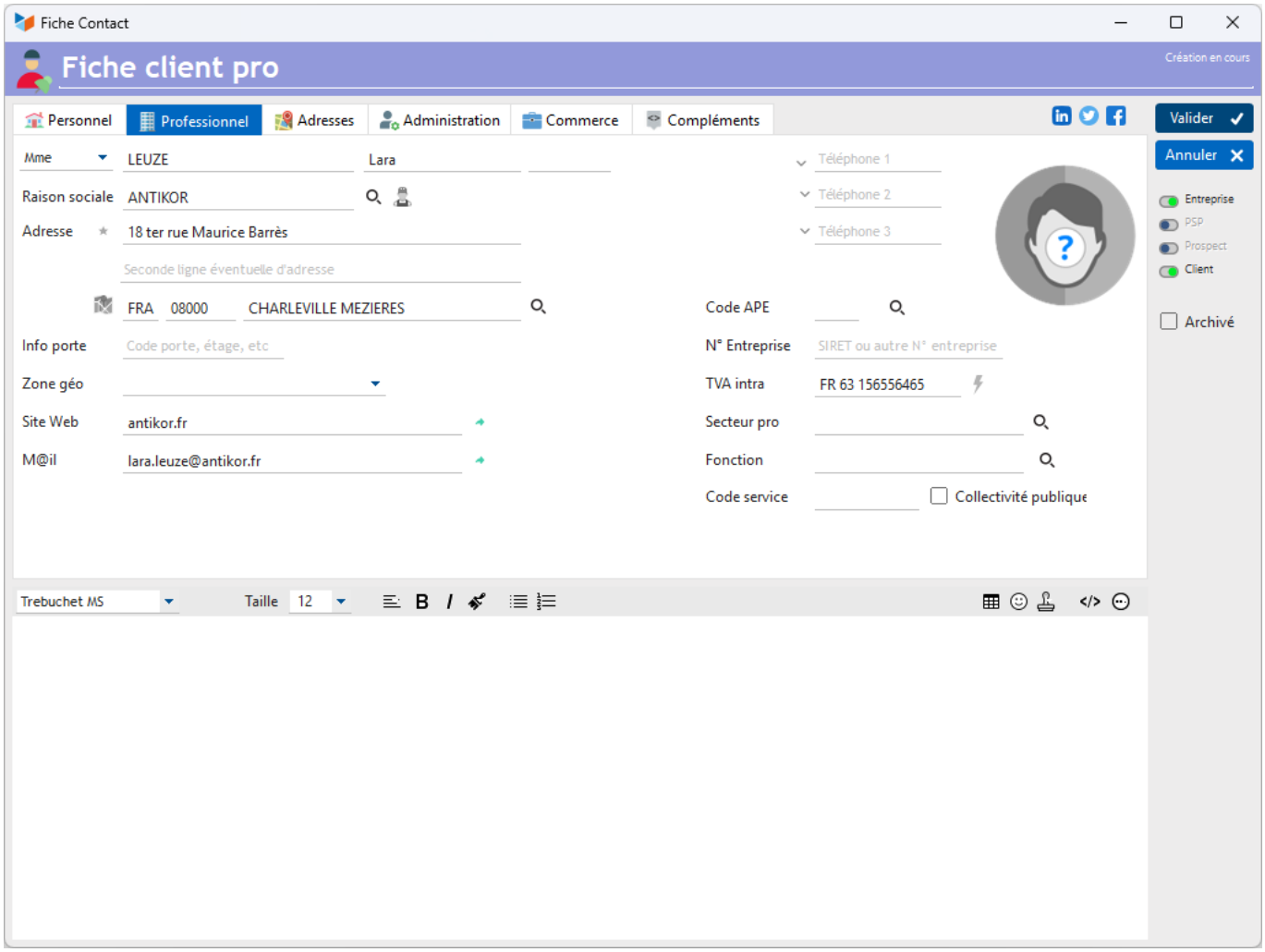
You can optionally add a photo of your product via the **Image** tab, and a detailed description via the **Description** tab. This description will be used in quote and invoice line items.

Confirm the entry by clicking the **OK** button.

📌 More iProduct information: this page.

Registering a client

Go to **Contact → All contacts** to open the contact list, then click the **New** button to register your first client.

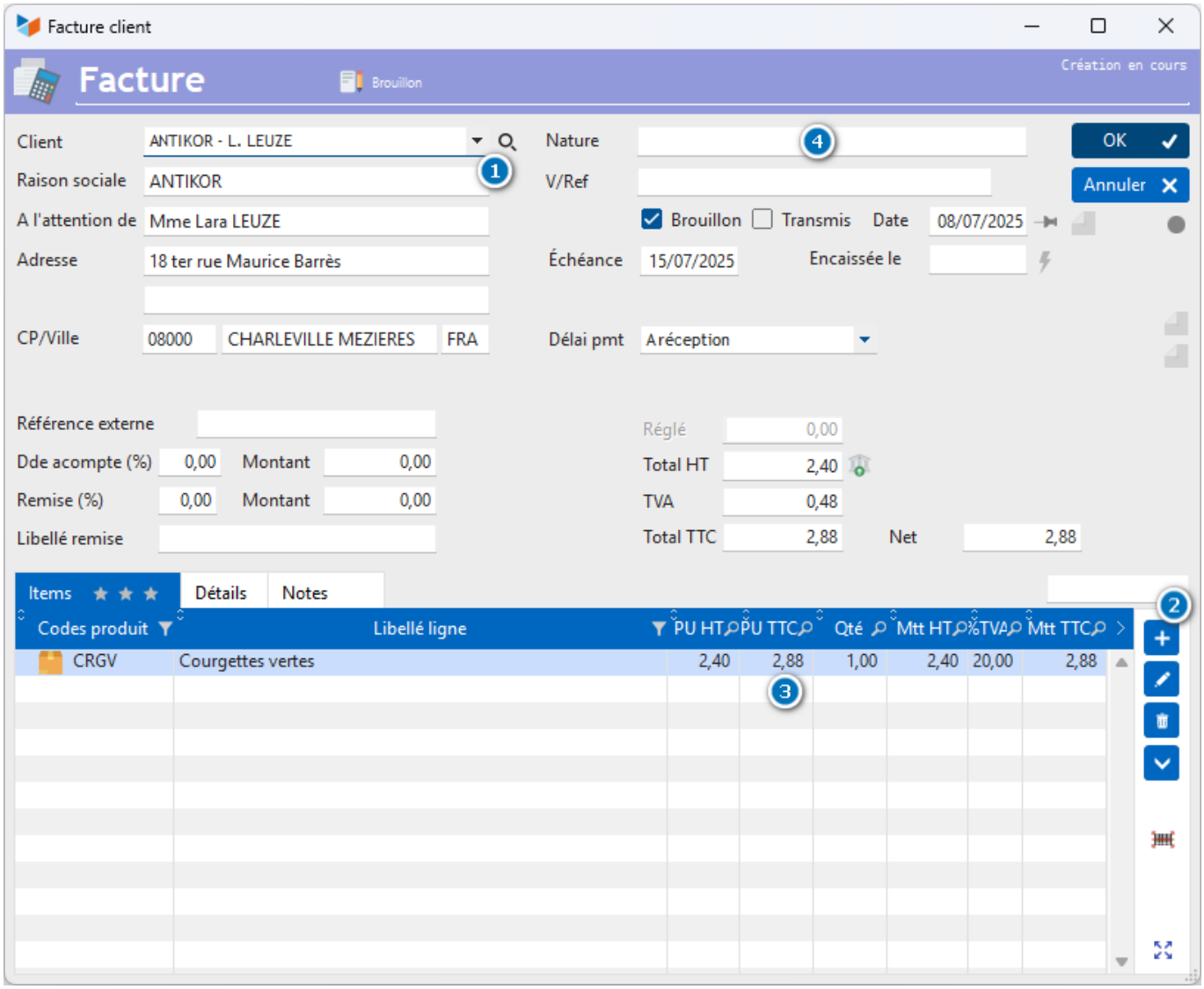


On this screen, enter the standard details: name, address, etc.

More information on contacts: this page.

Registering your first invoice

You are now ready to register your first invoice by clicking the **Invoice** button.



On this screen: * select the client using the magnifying glass icon 1 * click **+** 2 to add an item * optionally modify quantities or prices directly in the table 3 * optionally, enter an invoice type 4 to help with classification.

Click **Validate** to create your first invoice in Gestan!



i Other “Tools” articles

Compilable procedures
Connection to Gestan
Database minimization
Export Gestan database
Gestan base import
Gestan directory structure
Gestan on a USB stick
Gestan Versions
Import a chart of accounts
Import account assignments
Import contracts into Gestan
Import Google/Outlook/Notes contacts
Import parts into Gestan
Import product translations
Importing data into Gestan
Maintenance of HFSQL files
Mass Parts Removal
Quick start
Reallocation of contacts by region
Reassignment of users
Rebooking entries
Reset additional fields
Reset categories
Resetting files
Tips and tricks
Transfer your data to technical support
Zip the base

From:
https://manuel.gestan.fr/ - **Le manuel de Gestan**

Permanent link:
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