

How to Create a New Financial Year in Marg Books ?



👁 5466

Year 1



No

English

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Overview / Precaution of New Financial Year in Marg Books

New Financial Year (2026-2027) is being created so that the user can easily start generating the entries from **1st April 2026** in the Marg Books.

Important : Before creating the New Financial Year, following things needs to kept in mind:

- If software is running on multi user environment, then software **must be turned off from all the nodes connection.**
- **Log in** to the software using **the supervisor ID on the main system**

Process to Create New Financial Year in Marg Books

- **Select the company** for which New Financial Year needs to be created.
- Then, **press 'Enter' key** on the selected company.

Organisation List

Create/F2

Search here.

Organisation Name	Branch Code	Address	Action
AutoSwift Garage	AUGA	Plot No. 18, Ground Floor, Patel Nagar Industrial Area New ...	
FreshKart Supermarket	FRSU	Shop No. 10, Ground Floor, Main Market, Rajouri Garden N...	
Marg Books ✓	MABO	Plot No. 45, 2nd Floor, Industrial Area, Okhla Phase II New ...	
Mysha Fashion Hub	VAFAHU	Shop No. 21, First Floor, Lajpat Nagar Market New Delhi	
QuickMeds		Shop No. 12, Ground Floor, Arya Market Karol Bagh, New D...	
✓ Sunrise Pharmaceutical Ltd Primary		A- 386 , Sant Nagar, Burari, Delhi	
Sunrise Pharma - Uttarakhand	SP-U	345, Rudraprayag, Uttarakhand	
SwiftCell Hub	SWHU	Plot No. 15, Ground Floor, GT Karnal Road, Industrial Area ...	

Enter

- Click on 'Utilities & Tools'.

The screenshot shows the MargBooks dashboard for 'Marg Books (MABO)'. The left sidebar menu has 'Utilities & Tools' highlighted with a red box. The main dashboard area displays financial metrics for the financial year 01-04-2025 to 31-03-2026. A 'Fund Summary' section is visible, showing various financial balances. A 'MargBooks App' download popup is also present in the bottom right corner.

Metric	Value	Change
Net Sale	₹0.00 from ₹0.00	↑ 0.000%
Net Purchase	₹0.00 from ₹0.00	↑ 0.000%
Gross Profit	₹0.00 from ₹0.00	↑ 0.000%

Item	Value
Bank Balance	₹ 0.000
Cash Balance	₹ -3000.000
Cash Deposited	₹ 0.000
Withdrawal	₹ 0.000
Cheque For Deposit	₹ 0.000

Item	In Value
Current Receivable	₹ 2010.000
Overdue Receivable	₹ 0.000
Current Payable	₹ 0.000
Overdue Payable	₹ 0.000

- Click on 'New Financial Year' option.

The screenshot shows the Marg Books (MABO) interface. The top header includes the logo, user information (Books From 01-04-2024 to 31-03-2026), and system status (5.4 Mbr/e, V. 4.2.60.b). The main area is titled 'Utilities & Tools' and is divided into three columns: 'Data Management', 'Template Management', and 'Other Tools'. The 'Other Tools' column contains a list of options, with 'New Financial Year' highlighted by a red box and a red arrow pointing to it. Other options include Link Unit UQC, Import Method, Recycle Bin, Transaction Locking, DataSync Details, Report Designer, Tally Export, Multi-Editing, Ease Of Gst, Scheduler, and Export-Import Manager. A search bar is located at the top right of the main area.

- The user can view the current financial year is shown i.e. 2025-2026, in which the work is done currently.
- Now, in order to create New Financial Year, click on 'Create' button.

Create FinancialYear



Current Financial Year : - 01-04-2025 - 31-03-2026

New Financial Year

From * 01-04-2026 To * 31-03-2027

F10 Save

F9 Clear

Esc Close

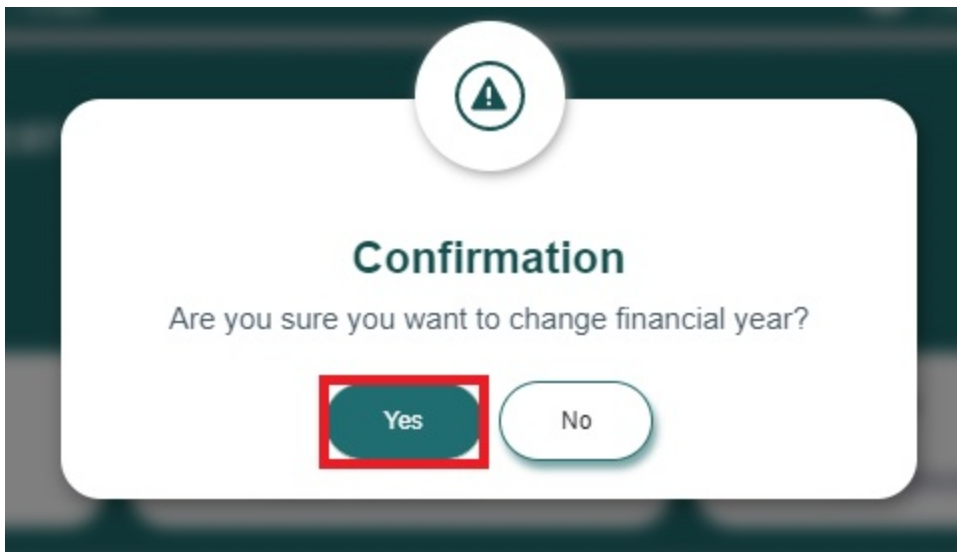
- The user will automatically be directed to the dashboard window of the Marg Books.
- The user can view that a dropdown with the name of 'Financial Year' has been added in which the current and the previous financial years will be shown.
- The user will switch to the new financial year from the current year with the help of this dropdown.

The screenshot displays the Marg Books dashboard. At the top, the current financial year is 01-04-2025 to 31-03-2026. A dropdown menu for 'Financial Year' is open, showing options for 01-04-2025 - 31-03-2026, 01-04-2024 - 31-03-2025, 01-04-2025 - 31-03-2026, and 01-04-2026 - 31-03-2027. A red arrow points to the dropdown menu. The dashboard also shows various financial metrics like Net Sale, Net Purchase, and Gross Profit, all at ₹0.00. A 'Fund Summary' table is visible at the bottom, and a 'MargBooks App' download prompt is on the right.

Fund Summary	
Bank Balance	₹ 0.000
Current Receivable	₹ 1392746.000
Overdue Receivable	₹ 1390736.000
Current Payable	₹ 0.000
Overdue Payable	₹ 0.000

Business	
CGST Payable	
SGST Payable	
IGST Payable	

- Click on 'Yes'.



After following the above steps, the user can easily Switch to New Financial Year in Marg Books.

Marg Books (MABO)
Books From 01-04-2024 to 31-03-2027

Dashboard **WATCH VIDEO**
Last Sync : 09-03-2026 | 05:21 PM

Financial Year : 01-04-2026 - 31-03-2027

Net Sale ₹0.00 from ₹0.00 (↑ 0.000%)

Net Purchase ₹0.00 from ₹0.00 (↑ 0.000%)

Gross Profit ₹0.00 from ₹0.00 (↑ 0.000%)

Fund Summary		Outstanding		Business	
Bank Balance	₹ 0.000	Current Receivable	₹ 1392746.000	CGST Payable	
Bank Balance Deposited	₹ -3000.000	Overdue Receivable	₹ 1390736.000	SGST Payable	
Bank Balance	₹ 0.000	Current Payable	₹ 0.000	IGST Payable	
Bank Balance	₹ 0.000	Overdue Payable	₹ 0.000		

MargBooks App
Download & Manage Business anywhere on Mobile

Scan & Install the App Instantly
Go to Settings to Google Play Store.

App Store

Effect After New Financial Year Creation in Marg Books

- Once the New Financial Year is created, all the previous year Ledger Balances, Outstanding, Stock Balances, Breakage Expiry Stock, Challans, Pending Orders, etc., will be carried forward to the New Financial Year.

Fig 1. Previous Year Ledger Balances in New Financial Year.

Marg Books (MABO) Books From 01-04-2024 to 31-03-2027 2.5 Mb/s V.1.3.212.b

Pur. Import Ticket Drug Helpline Help Settings Notification Shortcut History

Ledger Master **WATCH VIDEO** Total No of Ledgers:92

Search here... Name

Ledger Name	Station	₹ Balance	Action
A K Traders	Others	8,56,780.000 Dr	
A.J CO. T	Others	38,180.000 Cr	
AB Traders	Others	2,34,566.000 Dr	
ABC	Others		
Abc Test Ledger	Others		
Additional Charges On Free Items			
B. K TRADERS	Others	34,411.000 Cr	
BluePeak PVT	Others	2,850.000 Dr	
CGST Input			
CGST Input (RCM)			
CGST Output		1,000.000 Dr	
CGST Output (RCM)			
Cash Account		1,76,254.000 Cr	
Cess Input (RCM)			
Cess Output (RCM)			
Cess on GST Input			
Cess on GST Output			
City Distributors	Others	2,010.000 Dr	
Custom Duty			
D.D PVT LTD	Others	23,457.000 Dr	

Hey there !
How can we help you?

Fig 2. Previous Year Ledger Outstanding Balances in New Financial Year.

Marg Books (MABO) Books From 01-04-2024 to 31-03-2027 2.5 Mb/s V.1.3.212.b

Pur. Import Ticket Drug Helpline Help Settings Notification Shortcut History

Ledger Master : Outstanding Receivable Report

Search here... Name

<input type="checkbox"/> Ledger Name	Station	₹ Balance	Action
<input type="checkbox"/> A K Traders	Others	8,56,780.000 Dr	
<input type="checkbox"/> AB Traders	Others	2,34,566.000 Dr	
<input type="checkbox"/> D.D PVT LTD	Others	23,457.000 Dr	
<input type="checkbox"/> Isha Enterprises	Others	1,20,933.000 Dr	
<input type="checkbox"/> Kuldeep Pvt Ltd	Others	95,000.000 Dr	
<input type="checkbox"/> Sakshi Traders	Others	60,000.000 Dr	

Hey there !
How can we help you?

Fig 3. Previous Year Stock Balances in New Financial Year.

Marg Books (MABO) Books From 01-04-2024 to 31-03-2026 10 Mb/s

Pur. Import Ticket Drug Helpline Help Settings Notification Shortcut History

Main Store

Search here... Description Main Store Total no of items: 20

Item Code	Description	Packing	Opening Stock	Stock	Unit	Action
16	AMIFRU 40	10T	0	114.00	PCS	
17	AMLOGARD 5MG.	10 S	0	101.00	PCS	
4	Acnederm Lot	1*10	0	4437.00	STRIP	
10	Adderall	1*10	0	-5.00	TAB	
15	Ashutosh	10*1	2	0.00	BOX	
430	BECOSULE 10X10.	10X10.	0	0.00	PCS	
431	BECOSULES SYRUP 120ML 120ML	120ML	0	0.00	PCS	
9007	BLONG	10 S	0	0.00	PCS	
9001	CARNITOR INJECTION	5*5ML	0	0.00	PCS	
1	Cough Syrup		0	25.00	PCS	

Purchase Info: M.R.P : ₹ 200.00, Pur. Rate : ₹ 500.00, Cost : ₹ 500.00, Pur. Disc : 0+0

Sale Info: Rate : ₹ 500.00, Margin : 0.00, Deal Free : 0+0, W/o Deal :

Tax Info: HSN : 3304, Code : , IGST % : 5.00, CGST % : 2.50, SGST % : 2.50, Cess % : 0.00

Other Info: Company : CIPLA, Mfr. : Others, Conv. : 0, Salt : , Rack No. :

F4 | Ledger F6 | Old Rates F7 | Substitute F8 | Salt F9 | Company Alt+F11 | Category Available Stock * | Shortage Qty

Fig 4. Previous Year Brk /Exp Issue Balances in New Financial Year.

Marg Books (MABO) Books From 01-04-2024 to 31-03-2027 1.55 Mb/s V.1.3.212b

Pur. Import Ticket Drug Helpline Help Settings Notification Shortcut History

Brk/Exp Issue List

Search here... This Month F10 | Filter

Invoice No.	Date	Party	Station	₹ Amount	Action
DNB00001	09 Mar 2026	A.J CO. T	Others	513.000	
DNB00002	09 Mar 2026	BluePeak PVT	Others	2,850.000	

Bill & User Details: No.Of Bills : 2, User : admin

Printout Details: Print : 0, Print After Modification : 0

Activate Windows: Go to Settings to activate Windows.

Fig 5. Previous Year Purchase Challan Balances in New Financial Year.

Marg Books (MABO)
Books From 01-04-2024 to 31-03-2027
1.75 Mb/s V.1.3.212b

Purchase Challan List WATCH VIDEO

Search here. [This Month] F10 Filter

Challan No.	Date	Party	Station	₹ Amount	Action
1234	09 Mar 2026	A.J CO. T	Others	1,96,080.000	[Edit] [Print] [More]
12	09 Mar 2026	B. K TRADERS	Others	1,14,000.000	[Edit] [Print] [More]

Bill & User Details
No. Of Bills : 2
User : admin

Printout Details
Print : 0
Print After Modification : 0

Activate Windows
Go to Settings to activate Windows.

Fig 6. Previous Year Sale Challan Balances in New Financial Year.

Marg Books (MABO)
Books From 01-04-2024 to 31-03-2027
1.75 Mb/s V.1.3.212b

Sale Challan List Bulk Action Create/F2

Search here. [This Month] F10 Filter

Challan No.	Date	Patient Name	Party	₹ Amount	Action
CH0000001	09-03-2026	Kajal Kushwaha	A K Traders	60,000.000	[Edit] [Print] [More]
CH0000002	09-03-2026	Tushar Gupta	Sakshi Traders	3,000.000	[Edit] [Print] [More]

Bill & User Details
No. Of Bills : 2
Created By : admin
Modified By :

Printout Details
Print : 0
Print After Modification : 0

Other Details
E-waybill ✗ E-Invoice ✗ Upload ✗

Activate Windows
Go to Settings to activate Windows.

Fig 7. Previous Year in Purchase Order Balances in New Financial Year.

Marg Books (MABO)
Books From 01-04-2024 to 31-03-2027
1.75 Mbr/s V.1.3.212b

Pur. Import Ticket Drug Helpline Help Settings Notification Shortcut History

Purchase Order List **WATCH VIDEO** Create/F2

Search here. This Month F10 Filter

Order No.	Date	Party	Station	Status	₹ Amount	Action
OP000001	09 Mar 2026	BluePeak PVT	Others	Pending	1,04,595.000	
OP000002	09 Mar 2026	B. K TRADERS	Others	Pending	9,690.000	

Bill & User Details
No. Of Bills : 2
User : admin

Printout Details
Print : 0
Print After Modification : 0

Activate Windows
Go to Settings to activate Windows.

- If the user **switch & does any work in the previous year and manages the stock, then its impact will also automatically get visible in real-time in the New Financial Year**
- The user can easily **switch & adjust the working & stock management as per the requirement for both previous and New Financial Years.**

****For Example****

- In case **any Pending Challans, Orders, etc., that exists in the previous financial year; they will get carried forward in the New Financial Year and can be adjusted accordingly in the New Financial Year.**
- Also, the **Pending Challans, will get removed from the previous financial year once it gets adjusted in the New Financial Year.**