

How to create New Financial Year in Marg ERP Software?

- [Overview of New Financial Year Creation in Marg ERP Software](#)
- [Process to Create New Financial Year in Marg ERP Software](#)

OVERVIEW OF NEW FINANCIAL YEAR CREATION IN MARG ERP SOFTWARE

New Financial Year (2025-2026) is being created so that the user can easily start generating the entries from **1st April 2025** in the Software.

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

1. Take [Backup of Financial Year](#).
2. If software is running on multi user environment, then software **must be turned off from all the nodes connection**.
3. Close the Server Backup File i.e., Auto Backup file.

PROCESS TO CREATE NEW FINANCIAL YEAR IN MARG ERP SOFTWARE

- Firstly, press '**Alt+X**' key on the home screen of Marg ERP Software.

MARG ERP 9+ | CA-999 User | Ver-07-02-2025 | Lic-1425631 | MAERLT-Marg ERP Ltd. 2024-2025 | USER-A | MAIN COMPUTER

Masters Transactions Accounts Digital Books Final Reports Gst e-Way Stocks Daily Reports Reports Hot Keys Links Exit

Most viewed reports
Exit
Modify Bill
Switch Over
Item List
Party List
Bill

Recently viewed reports
Modify
All Ledgers
P.D.Cheques/Cash
Modify Challan
New
Modify Bill
Challan
Bill
Item List
Exit
Change User
Operator's
Journal
Profit & Loss
Modify Ledger

Digital Entry
Retailo Services
ERP to ERP Order NEW
margmart.com NEW

Pharmanxt Free Drug Helpline

WALLET Marketplace Message Ticket MARG HELP Live Community Dashboard Search

AXIS BANK

After a Successful Integration with SBI, ICICI and J&K Bank Marg ERP is Thrilled to Announce A Connected Banking with Axis Bank

Banking within Marg ERP9+ Software
Seamless Transactions Directly from Marg ERP

Check real-Time Bank Balance in 1 Click
Send Direct Payments to Bank Accounts

Alt + X

Marg Community OLX of Marg ERP!

Send Auto Payment Reminders on Whatsapp or SMS

Send Invoices on Whatsapp or SMS

MARG MARTH Find Customer ERP ORDER ONLINE ECOD SECURE SMART DOC MARG ERP CLOUD MARG ERP LIVE MARG BLOG

Sale
Purc. Challan
S/R Expiry
P/R Expiry
Receipt
Payment
Cash & Bank Book
Ledger A/c
Outstanding
Stock Status
Stock & Sales Analysis
Re-Order
Sales Book
Dispatch Summary
Bill Taging
Daily Analysis (MIS)
Todays Gross Profit
Exit

Marg ERP Ltd.-MAERLT
Date : 26 Feb.,2025
Day : Wednesday
Time : 15:32:20

Period Apr., 2024 - Mar., 2025

F1-Company Ctr+I-Item +L-Party +U-User +F1-Directory +F10-Calendar +F11-Printer

UPDATE New Updates

- A 'List of Companies' window will appear.
- Select the Company for which the new financial year needs to be created.
- Then press 'F8' key or 'Enter' key on the selected company.

MARG ERP 9+ | CA-999 User | Ver-07-02-2025 | Lic-1425631 | USER-A | MAIN COMPUTER

Marg

LIST OF COMPANIES

Marg ERP Ltd.	MAERLT
My Gst Cafe branch 1st	GSHE
My gst cafe e-way bill	MGCEB

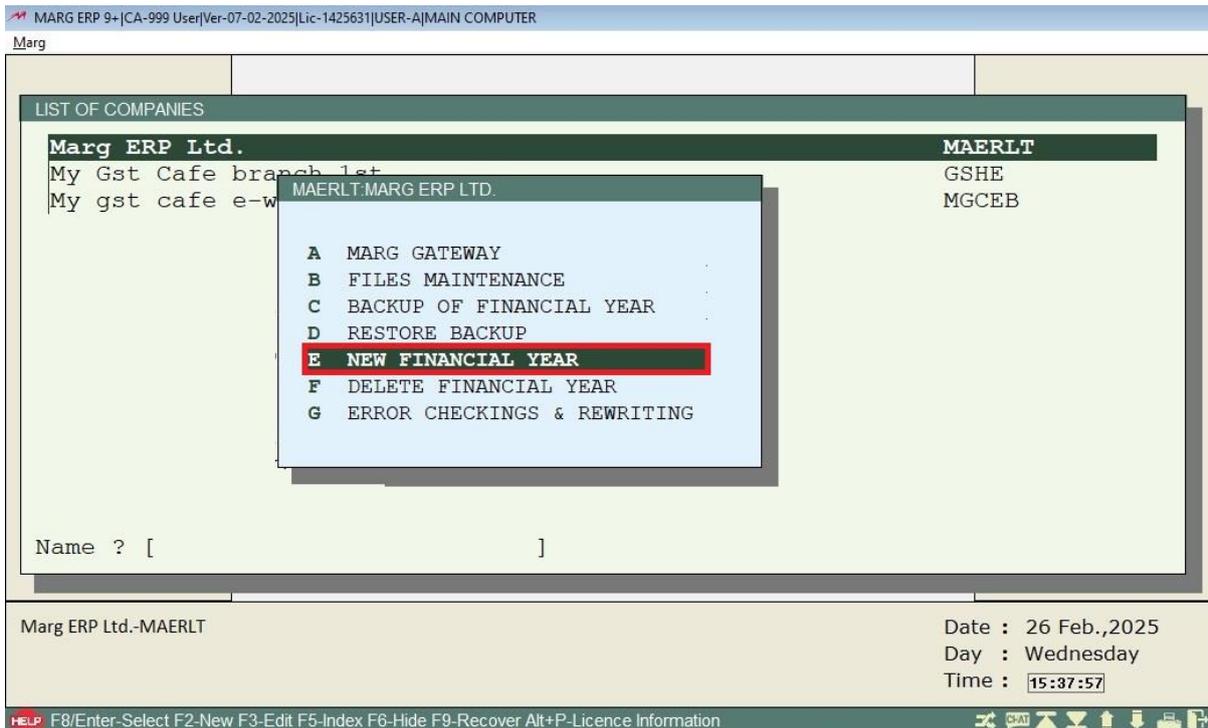
F8

Name ? []

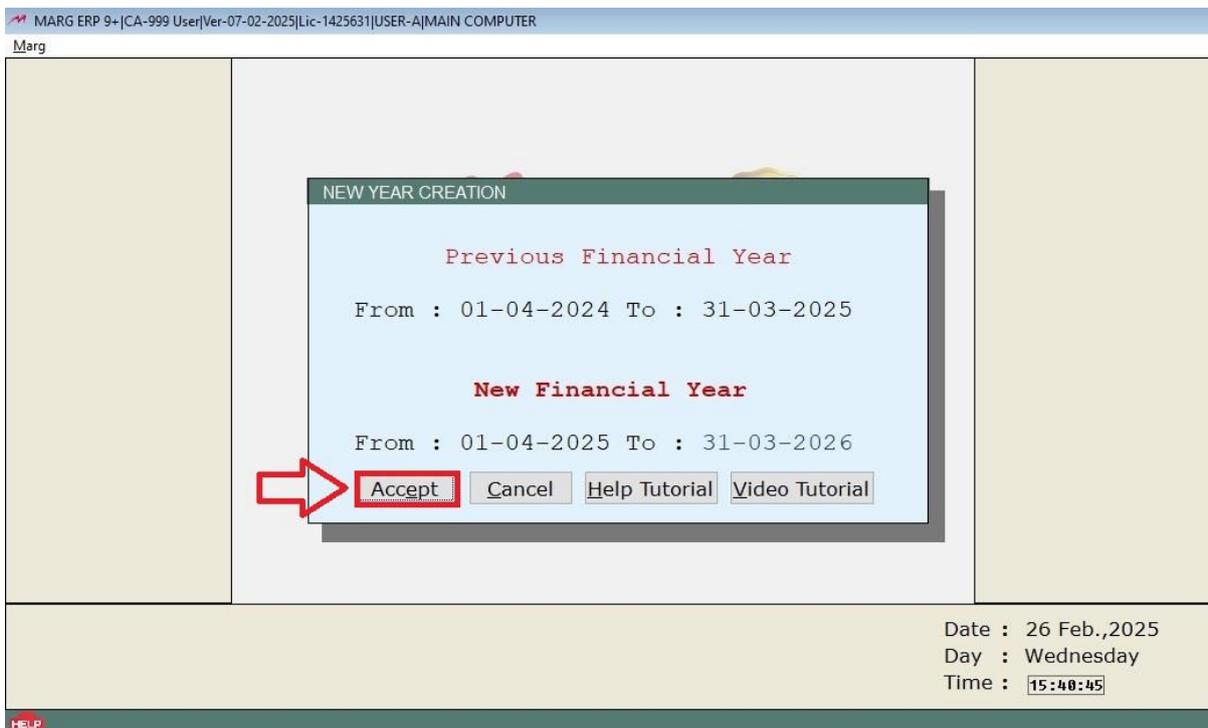
Marg ERP Ltd.
Date : 26 Feb.,2025
Day : Wednesday
Time : 15:35:04

HELP F8/Enter-Select F2-New F3-Edit F5-Index F6-Hide F9-Recover Alt+P-Licence Information

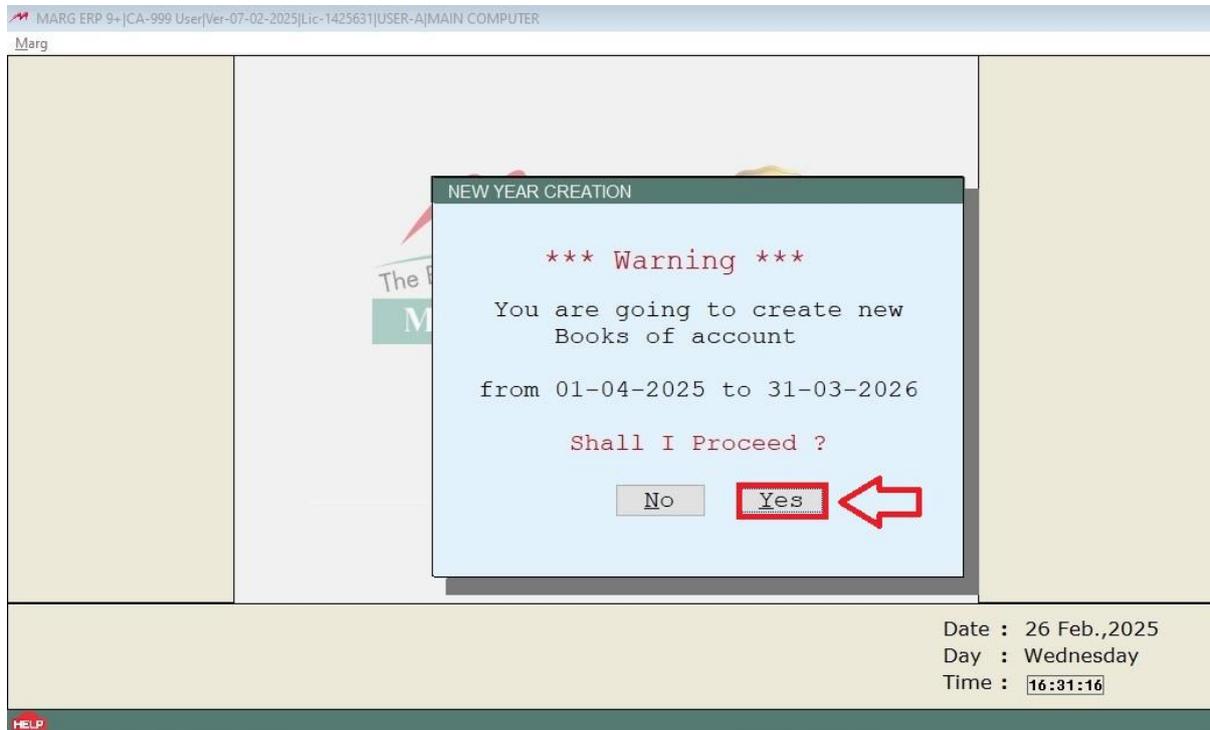
- Select 'New Financial Year' option.



- A 'New Year Creation' window will appear where the dates of the New Year will be defined i.e., 1st April 2025 to 31st March 2026.
- Click on 'Accept'.



- A warning window of **'Shall I Proceed?'** will appear.
- **Click on 'Yes'**.



- Then a **'Transfer Options'** window will appear.
- If the user needs to **Transfer the Ledger Balances, Outstanding, Stock Balances, Sales Challan, Pending Orders, etc. from the previous financial year, select 'Yes'** from the dropdown.

MARG ERP 9+|CA-999 User|Ver-07-02-2025|Lic-1425631|USER-A|MAIN COMPUTER

Marg

NEW YEAR CREATION

2024-2025 TO 2025-2026

T/F Ledger Balances	:	<input type="text" value="Yes"/>
Outstanding	:	<input type="text" value="Yes"/>
T/F Stock Balances	:	<input type="text" value="Yes"/>
Brk/Exp. Stock	:	<input type="text" value="No"/>
T/F Non working party	:	<input type="text" value="Yes"/>
Non working items	:	<input type="text" value="Yes"/>
Non working Batchs	:	<input type="text" value="No"/>

CHALLAN'S TRANSFER

T/F Sales	Challan	:	<input type="text" value="No"/>
S/Return	Challan	:	<input type="text" value="No"/>
S.Brk/Exp	Challan	:	<input type="text" value="No"/>
Replace	Challan	:	<input type="text" value="No"/>
T/F Purchase	Challan	:	<input type="text" value="No"/>
P/Return	Challan	:	<input type="text" value="No"/>
P.Brk/Exp	Challan	:	<input type="text" value="No"/>
Replace	Challan	:	<input type="text" value="No"/>
T/F Pending Orders	:	<input type="text" value="Yes"/>	

Shall I Proceed ?

: 26 Feb.,2025
: Wednesday
: 15:42:14

HELP

- Then Select 'Yes'.

By default, this option of 'Challan Transfer' remains 'No' as Challans can be transferred only once, so if the user is confirmed then only Select 'Yes'.

MARG ERP 9+|CA-999 User|Ver-07-02-2025|Lic-1425631|USER-A|MAIN COMPUTER

Marg

NEW YEAR CREATION

2024-2025 TO 2025-2026

T/F Ledger Balances	:	<input type="text" value="Yes"/>
Outstanding	:	<input type="text" value="Yes"/>
T/F Stock Balances	:	<input type="text" value="Yes"/>
Brk/Exp. Stock	:	<input type="text" value="No"/>
T/F Non working party	:	<input type="text" value="Yes"/>
Non working items	:	<input type="text" value="Yes"/>
Non working Batchs	:	<input type="text" value="No"/>

CHALLAN'S TRANSFER

T/F Sales	Challan	:	<input type="text" value="No"/>
S/Return	Challan	:	<input type="text" value="No"/>
S.Brk/Exp	Challan	:	<input type="text" value="No"/>
Replace	Challan	:	<input type="text" value="No"/>
T/F Purchase	Challan	:	<input type="text" value="No"/>
P/Return	Challan	:	<input type="text" value="No"/>
P.Brk/Exp	Challan	:	<input type="text" value="No"/>
Replace	Challan	:	<input type="text" value="No"/>
T/F Pending Orders	:	<input type="text" value="Yes"/>	

Shall I Proceed ?

: 26 Feb.,2025
: Wednesday
: 15:42:35

HELP

- Now the user can view the **new financial year is being created.**

This is a time taking process so kindly don't interrupt or close the system otherwise it will affect the data of the user.

MARG ERP 9+ | CA-999 User | Ver-07-02-2025 | Lic-1425631 | USER-A | MAIN COMPUTER

Marg



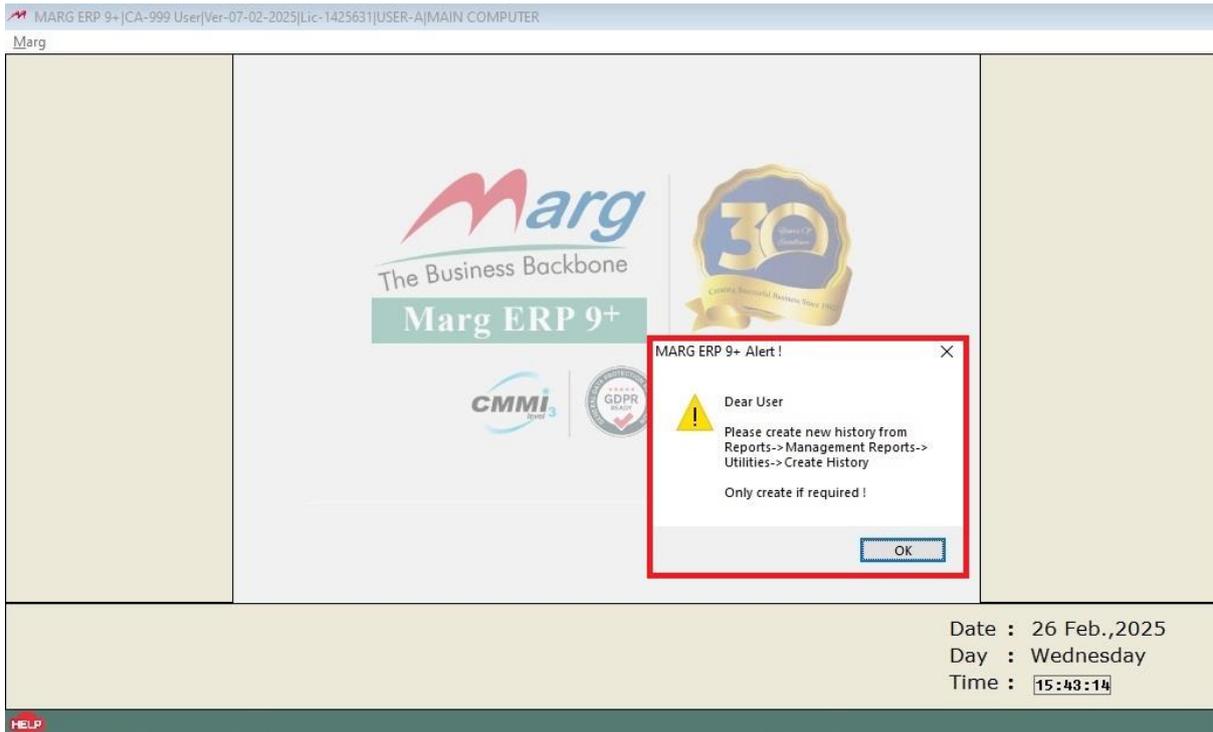
DATABASE UPGRADATION
File Name : DISTRAN2.R02
0.....25.....50.....75.....100

Date : 26 Feb.,2025
Day : Wednesday
Time : 15:37:57

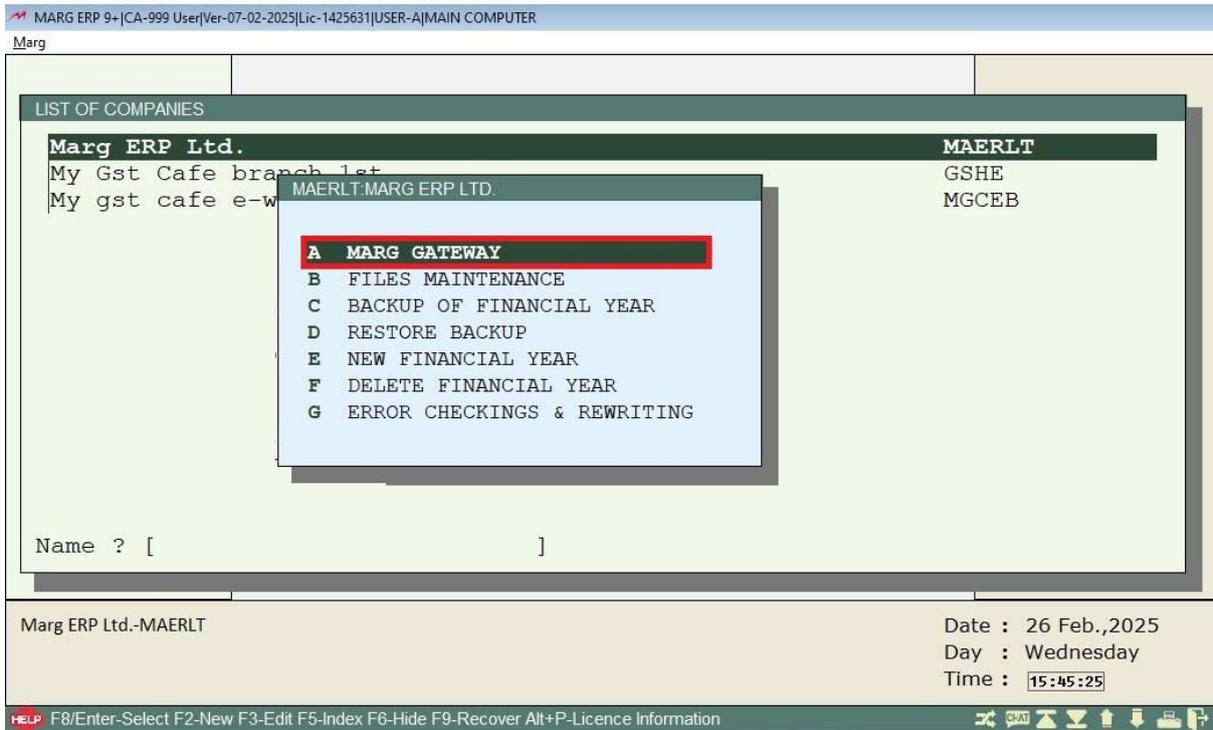
HELP

- Then click on 'Ok'.

To Create New History, go to Reports >> Management Reports >> Utilities >> Create History.



- Now click on 'Marg Gateway'.



- The user can view that a new financial year (2025-2026) has been created.
- Press 'Enter' key & come to the main home screen of Marg ERP Software.

MARG ERP 9+|CA-999 User|Ver-07-02-2025|Lic-1425631|USER-A|MAIN COMPUTER

Marg
SELECT TO EXECUTE 26-02-2025|Wed|P| 15:46:24

Marg ERP Ltd.-MAERLT

CODE	YEAR	FROM	TO	BACKUP UPTO	FREEZ UPTO
R02	2025 - 2026	01-04-2025	31-03-2026		
R01	2024 - 2025	01-04-2024	31-03-2025		

Data Folder : data\0001

HELP Enter-Run F3-Change Path

After following the above steps, the user can view **New Financial Year 2025-26** will get successfully created in Marg ERP Software.

MARG ERP 9+|CA-999 User|Ver-07-02-2025|Lic-1425631|MAERLT-Marg ERP Ltd. 2025-2026|USER-A|MAIN COMPUTER

Masters Transactions Accounts Digital Books Final Reports Gst e-Way Slips Daily Reports Reports Hot Keys Links Exit

Wallet Marketplace Message Ticket MARG HELP Live Community Dashboard Search

Most viewed reports

- Exit
- Modify Bill
- Switch Over
- Item List
- Party List
- Bill

Recently viewed reports

- Exit
- Profit & Loss
- Modify Ledger
- Modify
- All Ledgers
- P.D.Cheques/Cash
- Modify Challan
- New
- Modify Bill
- Challan
- Bill
- Item List
- Change User
- Operator's
- Journal

Digital Entry

- Retailo Services
- ERP to ERP Order NEW
- margmart.com NEW

Pharmanxt Free Drug Helpline



AXIS BANK

After a Successful Integration with SBI, ICICI and J&K Bank Marg ERP is Thrilled to Announce A Connected Banking Integration with Axis Bank

Banking within Marg ERP9+ Software
Seamless Transactions Directly from Marg ERP

Check real-Time Bank Balance in 1 Click
Send Direct Payments to Bank Accounts

Marg Community
OLX of Marg ERP!

Send Auto Payment Reminders on Whatsapp or SMS

Send Invoices on Whatsapp or SMS

Sale

- Purc.Challan
- S/R Expiry
- P/R Expiry
- Receipt
- Payment
- Cash & Bank Book
- Ledger A/c
- Outstanding
- Stock Status
- Stock & Sales Analysis
- Re-Order
- Sales Book
- Dispatch Summary
- Bill Tagging
- Daily Analysis (MIS)
- Today's Gross Profit
- Exit

Marg ERP Ltd.-MAERLT

Period Apr., 2025 - Mar., 2026

F1-Company Ctr+I-Item +L-Party +U-User +F1-Directory +F10-Calendar +F11-Printer

Date : 26 Feb.,2025
Day : Wednesday
Time : 15:47:01

UPDATE New Updates