Refrens

PRODUCT HANDBOOK 2026 · GLOBAL

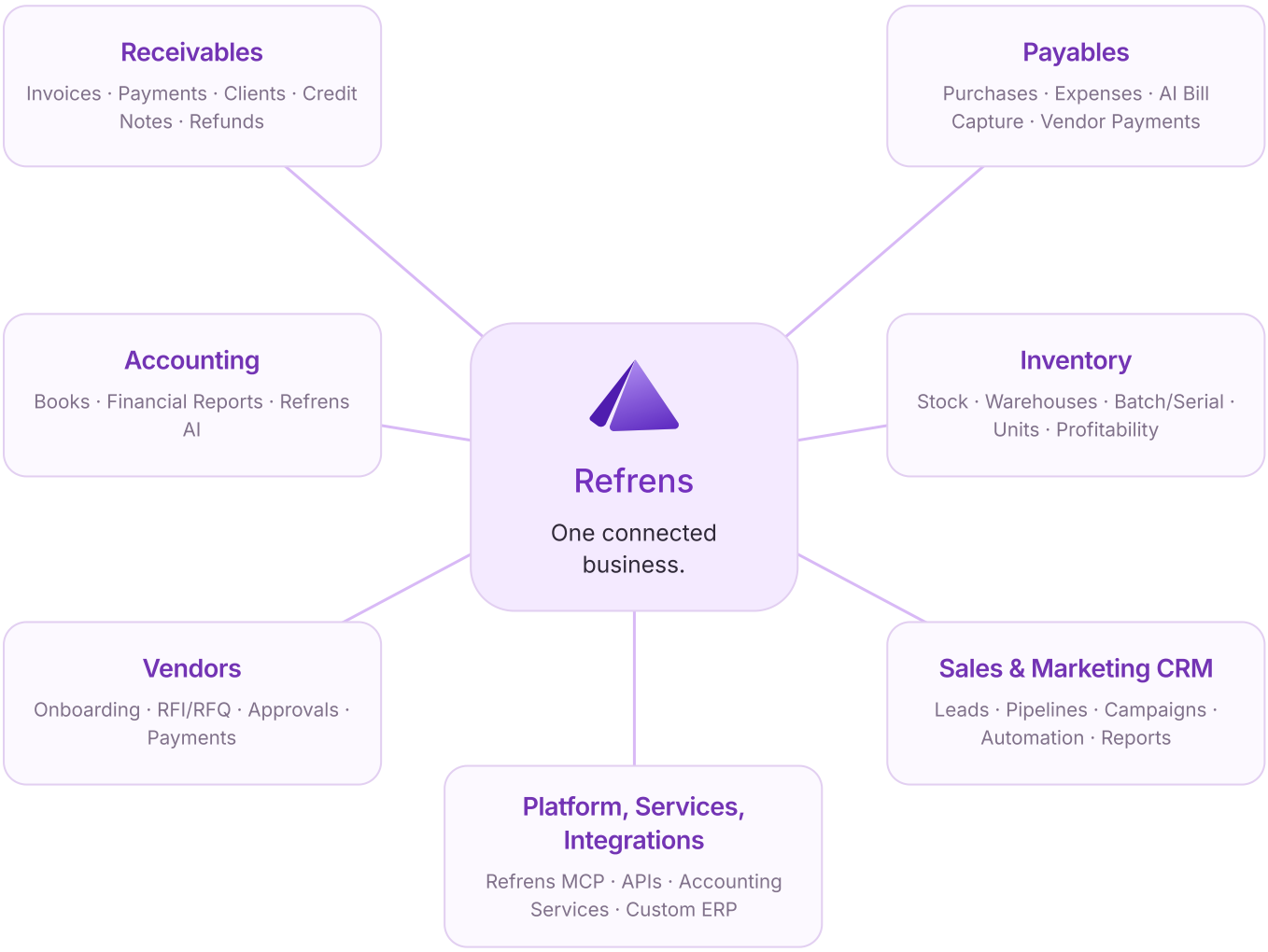
# Complete Guide to Refrens

Everything you need to know about Refrens — your AI-powered platform for Invoicing, Accounting, Inventory, Expenses, Vendors, Sales, and more.

| 300k+ | 170+ | 4.8/5 |
| --- | --- | --- |
| Businesses trust us | Countries served | Rated across 17k+ reviews |

# One platform. Everything connected.

Connect invoicing, purchases, accounting, inventory, vendors, and sales in one AI-powered platform. Documents, payments, stock movements, and financial records stay linked, giving your team a shared view of the business without duplicate entry.




## ALL POWERED BY REFRENS AI

### Refrens Eagle

AI Bill Capture

### Refrens MCP

Manage your business from ChatGPT, Claude, WhatsApp, or Slack

### FREYA

Get real-time business insights with an AI Accounting Agent

RATED BY OUR CUSTOMERS

# Highly rated by businesses worldwide

Easy-to-use software. Support that makes a difference. Here's how customers rate Refrens across review platforms.

| Capterra | Product Hunt | G2 | Trustpilot | Software Suggest |
|---|---|---|---|---|
| ★★★★½ | ★★★★★ | ★★★★★ | ★★★★★ | ★★★★★ |
| 4.6 /5 | 4.9 /5 | 4.7 /5 | 4.9 /5 | 4.9 /5 |

AWARDS AND RECOGNITION

# Recognised for ease of use and customer support

Recognition that reflects what our customers love about Refrens.




**Best Ease of Use**

Capterra · 2026




**Highly Recommended**

SoftwareSuggest · Winter 2025




**Category Leaders**

GetApp · 2025




**Best Support**

SoftwareSuggest · Winter 2025

# Modules

Explore the connected modules, from daily transactions and stock control to financial insights and sales growth.


01 **Receivables**

Create professional invoices, manage orders, and track customer payments. Automate reminders and keep billing and sales approvals connected. 05

02 **Payables**

Record purchases and expenses with AI-powered OCR Bill Scanning. Manage purchase orders, approvals, and vendor payments. 10

03 **Accounting**

Automate bookkeeping, reconcile bank transactions, and access Financial Reports and AI-built dashboards. 13

04 **Inventory**

Track stock across warehouses with batch, serial, warranty, and unit controls. Monitor availability, pricing, and product profitability. 16

05 **Vendors**

Collect vendor details, manage onboarding and purchase approvals, and track quotations, payments, ageing, and statements. 19

06 **Sales & Marketing CRM**

Capture and assign leads, manage sales pipelines, run WhatsApp outreach, automate welcome messages, and schedule email follow-ups. 22

07 **Platform, Services, Integrations**

Manage your business through Refrens MCP on ChatGPT, Claude, WhatsApp, and Slack. Manage multiple businesses, use mobile apps, connect APIs, and get expert accounting support. 26

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01

# Refrens for Receivables

- Tax and Non-Tax Invoices
- Payment Tracking
- Receivable Documents
- Recurring Invoices
- Multi-Currency
- Customer Advances
- Digital Signatures
- Automated Payment Reminders
- Reports and Insights
- Approval Workflows
- Freya AI Agent
- Refrens MCP

# Get paid faster, with less effort.

### Comprehensive Document Creation

Effortlessly generate Tax and Non-Tax Invoices, Proforma Invoices, Quotations, Estimates, Credit Notes, Sales Orders, Delivery Notes, Payment Receipts, and more.

### Complete Customisation

Customise layouts, fields, columns, formulas, branding, and watermarks. Add percentage-based charges and mandatory or searchable fields.

### Flexible Sharing

Send documents via email or WhatsApp directly from Refrens. Download PDFs, print documents, share secure online links, and track when clients view documents.

### Recurring Invoices

Automatically generate, save, and share recurring invoices at scheduled intervals. Maintain consistent billing without manual effort.

### Automated Payment Reminders

Send scheduled WhatsApp and email reminders for upcoming and overdue payments. Reduce payment delays without repeated follow-ups.

### Reusable Document Setups

Save your preferred document setup once and reuse it whenever you create a new document. Save time, avoid repetitive changes, and keep your documents consistent.

### Customer Advances

Record advance payments from customers and apply them to future invoices. Keep customer balances accurate and make payment tracking easier.

### Multi-Currency Support

Create documents in multiple currencies, set default currencies for clients, and display applied exchange rates on documents for clearer international transactions.

### Audit Trails

Maintain complete visibility into invoice activity with detailed records of who changed what, when, and how.

### Partial and Bulk Document Conversion

Turn one document type into another, partially or in bulk, without re-entering details. Keep related documents connected as orders move through billing and fulfilment.

### Credit Notes & Refunds

Settle credit notes against outstanding invoices or record full and partial customer refunds. Refrens updates available credit, generates refund receipts, and keeps accounting records in sync.

### Approval Workflows

Build multi-stage approval workflows for sales documents with role-based controls, approval limits, reminders, escalation rules, and complete approval history.

### Digital Signatures

Digitally sign invoices, quotations, Purchase Orders, and other documents to help verify document authenticity.

### Client Retention Reports

Identify clients at risk of leaving by analysing invoice activity, payment behaviour, spending trends, and engagement patterns. Prioritise follow-ups to retain customers.

### Receivable Reports

Track outstanding invoices, client ageing, payments, client balances, tax reports, and receivable trends with detailed reports for better cash-flow management.

### Freya AI Agent

Ask questions about your receivables, outstanding payments, sales performance, and customer activity. Get instant insights from your live Refrens data.

### Refrens MCP

Manage invoices, payments, and other receivable activities directly from ChatGPT, Claude, WhatsApp, or Slack with Refrens MCP.

### Price-Based Approval Workflows

Automatically route sales documents for approval when item prices fall below your configured selling prices. Protect margins and keep pricing exceptions under control.

### Roles and Permissions

Set user roles and permissions to control who can view, create, edit, and approve documents. Collaborate with your team and accountant while protecting business data.

### Early Payment Discounts

Offer discounts for early payment to encourage faster collections.

### Automated Inventory Updates

Keep stock records updated automatically as sales and purchase transactions are recorded.

### Profitability Tracking

Understand your margins by tracking sales revenue and the cost of items sold.

### Automated Bookkeeping

Turn invoices and payments into connected accounting entries without repetitive manual work.

### Invoice APIs & Integrations

Connect invoicing with your website and business systems to automate document creation and sharing.

### Client Document Acceptance

Let clients accept or reject shared documents online to speed up confirmations.

### Order Management

Track orders from confirmation to delivery and billing, with visibility into fulfilled and pending quantities.

### Contact Management

Organise multiple contacts for each client and keep the right people connected to every transaction.

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# Refrens for Payables

Refrens Eagle | Recurring Expenses | Bulk AI Expense Scanning | Vendor Management | Approval Workflows | Freya AI Agent | Refrens MCP

# Control every expense going out the door.

### Record All Purchases & Expenses

Track inventory purchases, salaries, admin expenses, petty cash, reimbursements, and other business expenses, centrally managed and categorised for better visibility.

### Refrens Eagle

Forward vendor bills through WhatsApp or email, or upload them directly. Refrens Eagle scans bills and payment screenshots, extracts the details, and prepares drafts for review. Scan multiple bills together to reduce manual entry.

### RFI/RFQ (Request for Invoice/Quotation) Links

Share custom links with vendors to collect invoices or quotations in the fields and format your business requires, reducing missing information and repeated follow-ups.

### Payable Documents

Create Purchase Orders, Debit Notes, and Payout Receipts with complete customisation, including templates, fields, formulas, and business-specific requirements.

### Recurring Purchases & Expenses

Automate recurring bills such as rent, subscriptions, salaries, and regular expenses. Records are created automatically at your preferred intervals.

### Vendor Onboarding

Collect vendor details, documents, and business information. Manage vendor leads and onboard vendors through structured review and approval workflows.

### Approval Workflows

Build multi-stage approval workflows for purchases, expenses, and payable documents with team roles, approval limits, reminders, escalation rules, and complete approval history.

### Payable Reports

Track vendor payments, ageing, tax reports, and payable trends with detailed reports for better cash-flow control.

### Automated Bookkeeping

Automatically create and update accounting entries from purchase and expense transactions, reducing repetitive manual accounting work.

### Refrens MCP

Manage your expenses, purchases, vendors, bills, payments, and more from ChatGPT, Claude, WhatsApp, or Slack using Refrens MCP.

### Partial and Bulk Document Conversion

Turn one document type into another, partially or in bulk, without re-entering details.

### Automated Inventory Updates

Keep stock records updated automatically as sales and purchase transactions are recorded.

### Roles and Permissions

Set user roles and permissions to control who can view, create, edit, and approve documents. Collaborate with your team and accountant while protecting business data.

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# Refrens for Accounting

- Balance Sheet and P&L
- Voucher Books
- Automated Bookkeeping
- Refrens MCP
- Business Health Dashboard
- Bank Reconciliation
- Freya AI Agent
- AI Report and Dashboard Builder
- Project-wise Profitability

# Books that update themselves.

### Automated Bookkeeping

Automatically create double-entry accounting records from invoices, purchases, expenses, and payments. Keep financial records connected and reduce manual bookkeeping.

### Bank Reconciliation

Upload bank statements, including PDFs, and reconcile transactions with your accounts. Identify mismatches and create missing accounting entries directly from unmatched transactions.

### Financial Reports & Custom Reports

Generate Trial Balance, Balance Sheet, P&L, Cash Flow, and Ledger Reports. Compare financial performance across periods, access the All Ledgers Master Report, and create custom reports with filters, metrics, and saved views.

### Business Health Dashboard

View revenue, expenses, new invoices, and sales leads in one dashboard. Track trends, compare periods, and filter data to monitor business performance.

### Customisable Chart of Accounts

Tailor your chart of accounts according to your business structure. Better categorisation helps generate clearer financial insights.

### Manual Journal Entries

Record financial transactions outside standard workflows with flexible manual journal and voucher entries.

### Team and Accountant Collaboration

Add multiple users with custom roles and permissions. Collaborate with accountants and teams while controlling access to sensitive business data.

### Freya AI Agent

Ask Freya questions about your finances and get instant insights from live Refrens data. Understand revenue, expenses, profitability, outstanding amounts, and financial trends.

### Audit Trails

Maintain complete visibility into financial activity with detailed records of who changed what, when, and where.

### Refrens MCP

Manage your receivables, payables, payments, and more directly from ChatGPT, Claude, WhatsApp, or Slack using Refrens MCP.

### AI Report and Dashboard Builder

Describe the report or dashboard you need and let Refrens AI build it from your business data. Create views for collections, sales commissions, warehouse performance, overdue payments, and more without waiting for custom development.

### Project-wise Profitability

Tag invoices and expenses by project to track each project's income, costs, and profit or loss. See which projects are profitable and which need attention with the Project-wise P&L Report.

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# Refrens for Inventory

- Auto Stock Updates
- Multi-Location Inventory
- Stock Alerts
- Batch and Serial Tracking
- Warranties and Expiries
- Inventory Reports
- Package Items
- Product Profitability
- Delivery Notes
- Unsold Inventory Report
- Refrens MCP
- Strict Inventory Control
- Multiple Units
- Batch-Specific Pricing

# Always know what you have and where.

### Real-Time Inventory Tracking & Stock Updates

Automatically update stock with every purchase and sale. Track quantities and movements in real time, and categorise items as finished goods, raw materials, consumables, or packaging materials.

### Multi-Location Management

Manage inventory across multiple branches and warehouses from one centralised dashboard. Track stock availability, movement, and transfers across locations.

### Strict Inventory Control

Prevent negative stock across items, warehouses, batches, and packages. Avoid selling or dispatching more stock than is available and keep your inventory records accurate.

### Batch, Serial & Warranty Tracking

Track products by batch or serial number, monitor expiry dates, and manage warranty periods and returns with accurate item-level records.

### Stock Transfers & Delivery Notes

Transfer stock between locations using Delivery Notes. Manage returns with Credit and Debit Notes, and control which items affect inventory.

### Manage Package Items

Create bundles of items frequently sold together. Stock levels of individual products automatically update whenever a package item is sold.

### Product-wise Profitability

Track buying price, landed cost, selling price, and product-level profitability with detailed reports to understand margins better.

### Bulk Stock Adjustments

Update and adjust stock quantities in bulk through CSV uploads. Save time and reduce manual inventory errors.

## Inventory Reports

Analyse stock valuation, expiry, party-wise transactions, stock status, and movements. Track item-wise order fulfilment and save custom report views with filters.

## Automated Bookkeeping

Automatically create accounting entries when inventory items are purchased or sold. Keep inventory and financial records connected.

## Inventory APIs

Manage inventory items, stock adjustments, and warehouse transfers through APIs. Sync Refrens inventory with external ERPs, warehouses, and e-commerce platforms.

## Stock Alerts

Set reorder and overstock levels to identify critical, low-stock, and overstocked items. Create Purchase Orders directly from low-stock items to simplify restocking.

## Unsold Inventory Report

Identify slow-moving and unsold stock, its value, warehouse location, and days without sales. Analyse items and batches to spot stock that needs attention before it leads to losses.

## Refrens MCP

Manage inventory insights from ChatGPT, Claude, WhatsApp, or Slack. Ask questions about stock levels, inventory movement, low-stock items, and product performance.

## Units of Measurement

Buy and sell the same product in different units, such as sacks, bags, or kilograms. Tell Refrens how much each bag or sack contains, and it automatically converts quantities to keep your stock accurate.

Example:
1 Bag = 25 KG
1 Sack = 50 KG

Buy in sacks and sell in bags. Refrens tracks the remaining stock in kilograms automatically.

## Batch-Specific Pricing

Automatically use the selected batch's price when creating documents. Save time on manual price checks and keep batch-based billing accurate.

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# Refrens for Vendors

Vendor Onboarding | Approval Workflows | RFI/RFQ Links | Vendor Payments

Vendor Ageing and Statements | Refrens Eagle | Freya AI Agent | Refrens MCP

# Manage every supplier relationship with confidence.

### Centralised Vendor Dashboard

Manage vendor details, purchase history, payments, and documents in one place. Search vendor records by name or tax ID, and set default currencies for transactions.

### Vendor Onboarding

Collect vendor details, documents, and business information. Manage vendor leads and onboard vendors through structured review and approval workflows.

### Vendor Lead Capture Forms

Create custom onboarding forms to collect vendor information and documents. Submissions automatically create vendor leads for review and onboarding.

### Vendor Approval Workflows

Route vendor onboarding through multi-stage approval workflows with predefined approvers, role-based controls, and complete approval history.

### Vendor Payment Tracking

Record vendor payments and advances, generate payout receipts, and reconcile payments against purchase records for complete payable visibility.

### RFI/RFQ Links

Share custom links with vendors to collect invoices or quotations in your preferred format. Reduce missing information, standardise submissions, and avoid repeated follow-ups.

### Vendor Statements

Automatically generate detailed vendor statements with complete payment history, purchase details, and outstanding balances.

### Vendor Ageing Reports

Monitor outstanding dues, prioritise critical payments, and avoid late fees with detailed ageing reports.

### Contact Management

Manage multiple points of contact for every vendor. Keep procurement, billing, accounts, and operations contacts organised and linked to the right relationship.

### Refrens Eagle (AI Bill Capture)

Forward vendor bills through WhatsApp or email, or upload them directly. Refrens Eagle extracts vendor and transaction details and prepares a Purchase or Expense draft for review.

### Freya AI Agent

Ask questions about vendors, payments, purchase history, and outstanding balances. Get instant insights from your vendor and payable data.

### Refrens MCP

Manage vendors, payments, purchase activity, and vendor operations from ChatGPT, Claude, WhatsApp, or Slack using Refrens MCP.

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# Refrens
## Sales & Marketing CRM

Custom Pipelines | Lead Capture Forms | Bulk WhatsApp Messaging | Automated Welcome Messages | AI Email Templates | Scheduled Emails | WhatsApp and Email | Third-party Integrations | Auto Lead Assignment | Sales Reports | Meeting Scheduling | Google Calendar Sync | APIs | Refrens MCP | Freya AI Agent

# From first enquiry to signed deal.

### Lead Capture & Management

Capture, organise, and manage leads from multiple sources in one centralised CRM. Create custom forms, track opportunities through every stage, and quickly review or update lead details without opening the full lead page.

### Custom Sales Pipelines

Build tailored sales pipelines for different products, services, or teams. Configure custom stages, expected durations, stage reasons, and deal statuses according to your sales process.

### Lead Communication & Follow-ups

Manage email and WhatsApp conversations, track activities, and stay on top of every opportunity with automated alerts and follow-up reminders.

### Automated Lead Assignment

Automatically assign incoming leads to the right salesperson based on source, form, product, or business rules. Reduce manual routing and improve response time.

### Duplicate Lead Identification

Automatically identify duplicate leads and keep your CRM clean. Help your team focus on genuine opportunities instead of managing repeated entries.

### Meeting Booking Forms

Allow prospects to book meetings directly through customised forms. Capture lead details, schedule discussions, and keep every interaction connected with the CRM.

### Bulk WhatsApp Messaging

Send approved WhatsApp templates to up to 100 selected leads at once from your connected WhatsApp Business number. Personalise messages with lead details and review recipients before sending.

### Automated Welcome Messages

Automatically send welcome emails and WhatsApp messages to new leads from Meta, IndiaMART, and TradeIndia. Acknowledge enquiries, introduce your business, and share the next steps without manual messaging.

### Google Calendar Sync

Sync lead meetings with Google Calendar, check available slots, add attendees, and auto-create Google Meet links for video meetings.

### Sales Reports

Track team performance, lead sources, conversions, and pipeline trends with detailed CRM reports. Create and save custom filtered views to monitor the sales metrics that matter to your business.

### Freya AI Agent

Get insights about your sales pipeline, lead activity, conversion trends, and lead interactions using your live Refrens data.

### Third-party Integrations

Connect Refrens with IndiaMART, TradeIndia, Meta, and other third-party platforms to bring leads into one centralised CRM.

### Refrens MCP

Manage your leads directly from ChatGPT, Claude, WhatsApp, or Slack with Refrens MCP.

### Team Collaboration & Permissions

Add multiple users with custom roles and permissions. Collaborate across sales teams while controlling access to lead data and business information.

### Custom WhatsApp and Email Templates

Create reusable templates for lead follow-ups, invoices, quotations, and payment reminders. Personalise messages with variables and use AI to draft email templates from a simple description.

### Scheduled Lead Emails

Prepare lead emails in advance and choose the date, time, and time zone for delivery. Keep follow-ups on schedule without remembering to send each email manually.

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# Platform, Services, Integrations

Multiple Business Accounts

Android and iOS Apps

Refrens MCP

Accounting and Bookkeeping Services

APIs and Integrations

# Go further with Refrens.

## Multiple Business Accounts

Manage separate business accounts in Refrens and switch between them as you work.

## Android and iOS Apps

Manage your business on the go with Refrens apps for Android and iOS.

## Refrens MCP

Manage your business from ChatGPT, Claude, WhatsApp, or Slack. Create documents, record payments, check inventory, manage leads, and get insights using messages or WhatsApp voice notes.

## APIs and Integrations

Connect Refrens with your website, applications, and business systems. Automate invoicing, payments, inventory, and CRM workflows with APIs, Shopify, and Pabbly Connect.

## Accounting and Bookkeeping Services

Get a dedicated accountant from Refrens to manage bookkeeping, accounting, reconciliations, and other finance operations.

# Custom Solutions

Get a tailored solution for your unique business requirements.

### Streamlining Vendor and Enterprise Expense Management

Read Case Study →

### Automating Reseller Invoicing With Refrens Invoice API

Read Case Study →

### Streamlining Vendor Onboarding and Invoice Approvals

Read Case Study →

### Centralising Multi-Branch Quotation Approval Workflows

Read Case Study →

### Streamlining Global Approvals, Billing and AR Visibility

Read Case Study →

### Managing Custom Quotation Approvals for Machinery and Robotics

Read Case Study →

# Get started today.

Everything you need to hit the ground running with Refrens.

### Demo Videos

Watch guided walkthroughs of every feature, from invoicing to inventory management.

### Knowledge Base

Step-by-step articles and guides for every feature. Self-serve support whenever you need it.

### New Updates

Stay up to date with the latest product improvements and newly launched features.

### Product Roadmap

See what's coming next and vote on the features most important to your business.

### View Pricing

View plans, features, and pricing to find the right plan for your business needs.

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Sign up free, explore plans, or book a personalised demo with our team.

## Talk to us

Our support team is available to help you get started.

care@refrens.com

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