

KSV Data Saver — Setup Guide

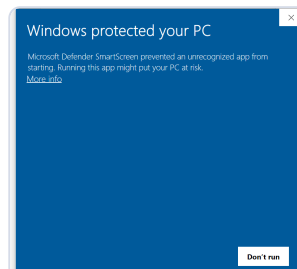
Version 1.3

Saves your clients' WhatsApp documents into folders automatically: Client > Month > Sale / Purchase 7-day free trial / Expenses / Bank Statement

You need: Windows 10 or 11 (64-bit) · Google Chrome or Microsoft Edge · Internet · Your office WhatsApp on a phone. Setup takes about 10 minutes.

1 Install

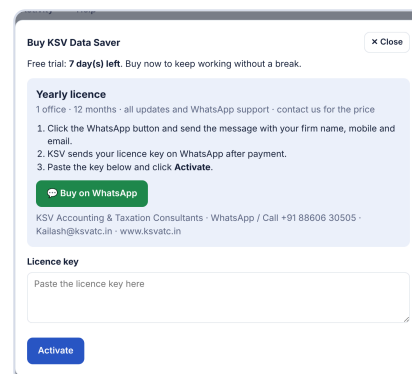
- Download **KSV-Data-Saver-Setup.exe** from the link KSV sent you and double-click it.
- If a blue **"Windows protected your PC"** screen appears, click **More info**, then **Run anyway**. This is normal for new software.
- Click **Next** → **Install** → **Finish**. The first install takes 1–2 minutes (it downloads a component from the internet).
- No "Run as administrator" needed. A **KSV Data Saver** icon is placed on your desktop.



2 Free trial and licence

- Your **7-day free trial** starts by itself — all features work.
- To buy, click **Buy** (top bar) → **Buy on WhatsApp**. Fill in your firm name, mobile and email in the message and send it.
- After payment, KSV sends your **licence key** on WhatsApp. Paste it in the **Licence key** box → **Activate**.
- The licence is in your firm's name and shows at the top of the app.

After the trial or licence ends, saving stops until you activate. Files already saved stay in your folder.



3 Add your clients

- Open the **Clients** tab. Either click **+ Add from my WhatsApp** and tick your client groups (after step 5), or fill the **Client list template** (Excel) and click **Import Excel**.
- Enter each client's **GSTIN** — this is how the tool tells a **Sale** invoice from a **Purchase** invoice. Then click **Save changes**.

Clients — groups and numbers

+ Add from my WhatsApp

+ Add manually

Import Excel

Export Excel

Save changes

First column = WhatsApp **group name** or **contact name**, or a **mobile number** for a personal chat (the start of a name is enough). **GSTIN** lets the app tell Sale from Purchase correctly — comma-separate several GSTINs.

WHATSAPP GROUP / CONTACT / NUMBER	FOLDER NAME	GSTIN(S)	OTHER NAMES ON INVOICES	SALES PREFIX			
Accounts - Sharma Traders	Sharma Traders	06AAAAA0000A1Z5		ST/	↓	📁	Re-sort ✕
Accounts - Gupta Fabrics	Gupta Fabrics	07AAAAA0000A1Z3		e.g. INV/	↓	📁	Re-sort ✕
Om Sai Pharma - GST	Om Sai Pharma	e.g. 06ABCDE1234F1Z5		e.g. INV/	↓	📁	Re-sort ✕
Bansal Electricals	Bansal Electricals	09AAAAA0000A1Z9	Bansal Elec	BE-	↓	📁	Re-sort ✕
9876500000	Rahul Verma (personal)	e.g. 06ABCDE1234F1Z5		e.g. INV/	↓	📁	Re-sort ✕

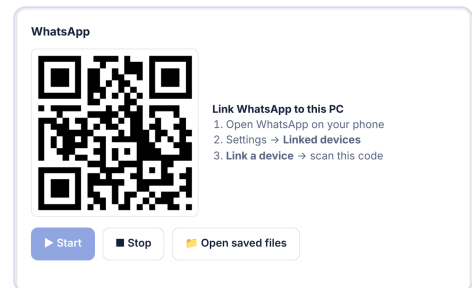
4 Settings (once)

- **When should it run?** *Always on* (best for an office PC), *At set times*, or *Only when I click*.
- **Save files in:** your folder, e.g. D:\Client WhatsApp Documents.
- **Which chats:** your client list (plus groups whose name contains a word like "accounts"), only the list, or *Complete WhatsApp* (backup of everything).
- **Office numbers and staff names:** enter your own office phones and staff, so their files are not saved as client documents. Tick the boxes if you do want them.
- **Save these kinds:** documents, photos, videos, voice notes.
- Click **Save settings**.

The screenshot shows the 'Saving' settings window. It includes sections for 'Save files in' (D:\Client WhatsApp Documents), 'Which chats to save from?' (My client list plus any group whose name contains accounts), 'Office and own files' (checkboxes for saving office numbers and staff files), 'Office numbers — files from these are NOT saved' (a list of phone numbers), 'Office staff names (as saved in phone) — NOT saved' (a list of staff names), and 'Save these kinds' (checkboxes for Documents, Photos/screenshots, Videos, and Voice notes/audio).

5 Link WhatsApp

- On the **Home** tab click **Start**. A QR code appears in about a minute.
- On your phone: **WhatsApp** → **Settings** → **Linked devices** → **Link a device** → scan the code.
- The top bar turns green: **Running — watching groups**. Your phone keeps working normally.



6 Daily use

- New client documents are saved and sorted **automatically**.
- **Download now:** pick a period (Today, Last 7 days, This month, or exact dates and times) and *all* or *selected* clients → **Download**.
- The **Status** box shows the date and time of the last file saved; **Activity** shows every file and why any file was skipped.
- **Open saved files** opens your folder.

```
D:\Client WhatsApp Documents\  
Sharma Traders\  
  Oct 2026\  
    Sale\  Purchase\  Expenses\  
    Bank Statement\  Vendor Ledger\  Other\  
_Index.csv (list of every file saved)
```

The screenshot shows the 'Download now' dialog box. It allows users to fetch documents for a specific period (Today, Yesterday, Last 3 days, Last 7 days, This month) and for specific clients. The 'Last 3 days' period is selected. The 'Selected clients' dropdown shows '2 selected' clients: Sharma Traders and Ransel Electrodale. There are checkboxes for Gupta Fabrics and Om Sai Pharma.

Good to know: your files stay on your own computer — nothing is sent to KSV. Keep the PC on and connected for "Always on" mode. If WhatsApp is unlinked from the phone, click Start and scan again.

KSV Data Saver connects through WhatsApp's linked-device (WhatsApp Web) feature, which is not an official WhatsApp business integration. Use it on your own office number at your own discretion.