

BUSINESS MANAGEMENT FOR SMALL AND MEDIUM-SIZED BUSINESSES

Customers, orders, stock and finances – in one place

Kalati is a business management system that runs in the browser. It keeps your customers, orders, stock, purchasing, invoices and payments in one shared database, and every morning it gathers what you need to pay attention to that day. It's for you if your business has outgrown its spreadsheets but doesn't need a large, expensive ERP system that takes months to roll out.

8

business areas in one system

4

permission levels, set per module

2

languages: Hungarian and English interface and manual

0

installs on your team's computers – browser and mobile

Where most businesses start

- Data lives in several Excel files, emails and notebooks – there's no single source of truth.
- Stock levels and outstanding payments only come to light later, after counting by hand.
- Returning customers slip through the cracks, and reorders are left to chance.
- You can't see who changed what, and staff see either everything or nothing.

What Kalati gives you instead

- One shared database that every authorised team member uses at the same time.
- Stock, balances due, totals and margin are calculated automatically from every transaction.
- The system tells you who to contact, what to order, what's expiring and who's late paying.
- Permissions per module and a change log.

Who is it for?

- **Small trading and distribution businesses** that work with stock, purchasing and returning customers.
- **Behind a webshop or direct sales**, where the admin of orders, shipping and invoicing has outgrown the spreadsheets.
- **Service providers** who need customer records, task management and invoice tracking.
- **Sole traders and family businesses** who keep all the records themselves today and want a clear system that isn't oversized.

Key benefits



Everything connected

Customers, orders, stock and invoices reference each other. A customer's complete history – orders, invoices, tasks, buying habits – is on a single record page.



Less manual calculation

You never type in totals, stock, balances or profit – the system calculates them, so they can't drift. You issue an invoice with one click.



It tells you in advance

The dashboard's "Needs attention" bar, the notifications and the morning summary email flag overdue tasks, products to reorder and late payments.



Your data stays yours

Every customer gets a separate instance with its own database. Backups run automatically every day (and manually from the interface), and every list – even your entire data set – can be exported to Excel.



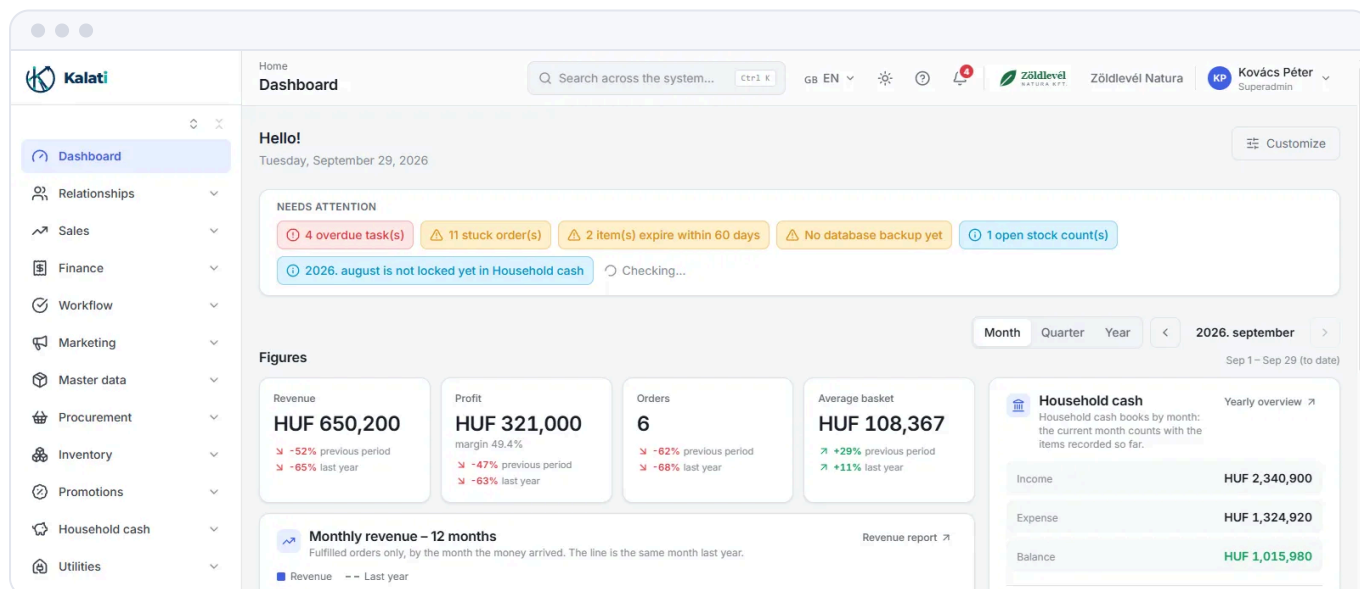
Only what you need

You switch on only the modules you need – the interface stays simple, and the pricing plan is put together module by module too. Labels and list columns adapt to the way you work.



Quick move from Excel

An import wizard for customers, companies, products and opening stock, with undo – you start from the records you already have.



The dashboard: the day's tasks, sales compared with the previous period and the items that need attention, on one screen. (Demo data.)

Main features

Management overview	Customisable dashboard; periods are compared “up to the same day”, so the picture is accurate in mid-month too. Sales report, cash flow, monthly charts by product (revenue, profit, stock), and net worth with Household cash.
Customer relations	Customers and companies with record pages and timelines, contacts, leads. Town filled in from the postcode, full purchase history for every customer.
Sales	Orders with line items, shipping and dispatch; the status follows the order type. Cancellations and returns, product loans.
Customer retention	Reorder forecast: estimates from the buying rhythm when a customer will run out and who is worth contacting now – their last order can be repeated with one click. Customer analysis (RFM): best, at-risk and dormant customers; one click turns a segment into a task.
Purchasing	Order suggestions based on actual consumption, counting goods in transit. Purchase orders to suppliers, receiving into stock at purchase price.
Stock	Stock is used up in the order it was bought (FIFO), so profit is accurate line by line. Every movement is logged against its document; stocktaking, monthly stock values, warnings for items about to expire.
Finance	Invoices, payments including partial payments, calculated balances due, payment reminders. Invoicing through szamlazz.hu or Billingo.
Work organisation	Tasks with deadlines and recurrence, activities by type; notifications in the app and in a morning summary email.
Marketing	Records of campaigns and newsletters, with status and automatic reference codes.
Convenience	Search from any screen (Ctrl + K): customers, orders, products and invoices from a single field. Selectable, reorderable columns and Excel export on every list.

Optional modules – if you need them: Household cash (income, expenses, budget vs. actual, cash accounts), and a module that follows the monthly order cycle of network marketing. They don't affect the other modules.

What it means day to day

IN THE MORNING

Your day at a glance

The morning email and the dashboard show today's tasks, overdue invoices and products to reorder.

DURING A PHONE CALL

Every customer detail at hand

Ctrl + K and a few letters of the name: what they bought and when, whether they owe anything, any open task.

BEFORE PURCHASING

Order from consumption, not gut feeling

Based on real consumption and goods in transit – less money tied up in stock, fewer shortages.

AT MONTH END

Closing without summary sheets

Sales, profit, receivables and monthly stock value – without a separate Excel roll-up.

Security and operations

- **Roles and permissions** – four levels per module: none, read, write, manage. Deleting and irreversible actions are allowed only at the top level.
- **Change log** – you can look up who changed what, and when.
- **Concurrent editing protection** – if two people edit the same record, the system warns them instead of silently overwriting the other person's work.
- **Your own instance** – a separate instance with its own database, with no installation or server of your own; automatic daily backups.
- **Anywhere** – works on desktop, tablet and phone, and can be installed as an app on your phone.
- **With your branding** – your company's name and logo appear in the header, on printouts and in emails; Hungarian and English interface.

Master data / Customers
Customers

Search across the system... Ctrl+K

GB EN

Zöldlevel NATURA KFT. Zöldlevel Natura

KP Kovács Péter Superadmin

Customers

Nagy Orsolya Family Champions

Customer since Jan 24, 2025

+36 30 000 0023 nagy.orsolya23@example.com 9022 Győr, Deák Ferenc utca 84.

Total purchases
HUF 376,700
fulfilled orders: 5 · 1 in progress

Average basket
HUF 80,900
returns: HUF 27,800

Profit
HUF 199,900
53.1% margin

First / last purchase
Sep 07, 2026
Jan 24, 2025

Orders

DATE	ITEMS	STATUS	GROSS	PROFIT
Sep 07, 2026	Ráncalanító szérum 3...	Bank transfer in advance Transferred	HUF 220,590	HUF 122,800

Reorder

Expected order
Dec 22, 2026
in 84 days

Cycle
106 days from the rhythm of 6 purchases

Customer record: orders, invoices, tasks, timeline and buying habits on one page. (Demo data.)

Getting started

1

Try it

In the demo system, no sign-up needed.

2

Plan

Choose your modules and roles.

3

Import

Bring over your existing Excel sheets.

4

Set up

Company details, team, invoicing.

5

Get going

The built-in manual helps you.

See it in action

The demo is the same software that runs in production – only the data is made up. We're happy to show you how to bring over your existing records, and which modules you'll need.

DEMO

kalati.hu

CONTACT

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