WhatBooks Help

The bookkeeping and inventory guide for Whatnot sellers — step by step, with pictures of the real app.

Updated October 2026 · whatbooks.app · Questions: support@diggingoutdoors.com

About this guide

WhatBooks is a bookkeeping and inventory app for Whatnot sellers. It turns your Whatnot exports into clear numbers — revenue, fees, costs and net profit — and keeps your inventory, expenses, shows and customers in one place. Your books live on your own computer, not on our servers.

> **Not tax advice.** WhatBooks is a record-keeping tool. Its figures come from the data you import or type in and are for information only — they are not tax, legal, accounting or financial advice. Tax rules vary and change; check with a qualified tax professional before you file.

The screenshots show a made-up shop (“Fernwood Vintage Trading Co. (DEMO)”) so you can see what each screen looks like with real-looking numbers. Yours will show your own data. The newest version of this guide is always in the **Help** tab inside WhatBooks.

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Backups, restoring and starting over

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1. Quick start (about 15 minutes)

1. **Set your shop name.** Settings → Shop name. It shows in the page header.
2. **Clear the example data.** On first launch WhatBooks loads a few example items and transactions so you have something to look at. Settings → Example data → **Clear example data**. This removes only the examples, never anything you added.
3. **Import your Whatnot history, in this order** (Import tab; the details are in section 4):
    1. **Seller Ledger** — the complete record of money in and out.
    2. **Weekly Order Reports** — adds each sale's fee breakdown, buyer and show.
    3. **Show Analytics** — per-show performance.
4. **Check the Dashboard.** Pick a date range and read the Net profit tile.
5. **Download a backup** (Backup & Data tab → Download backup). Do this after every big import.

Optional but useful: set your **Whatnot fee rate** in Settings if it differs from the default (8% commission + 2.9% payment processing + $0.30 per order).

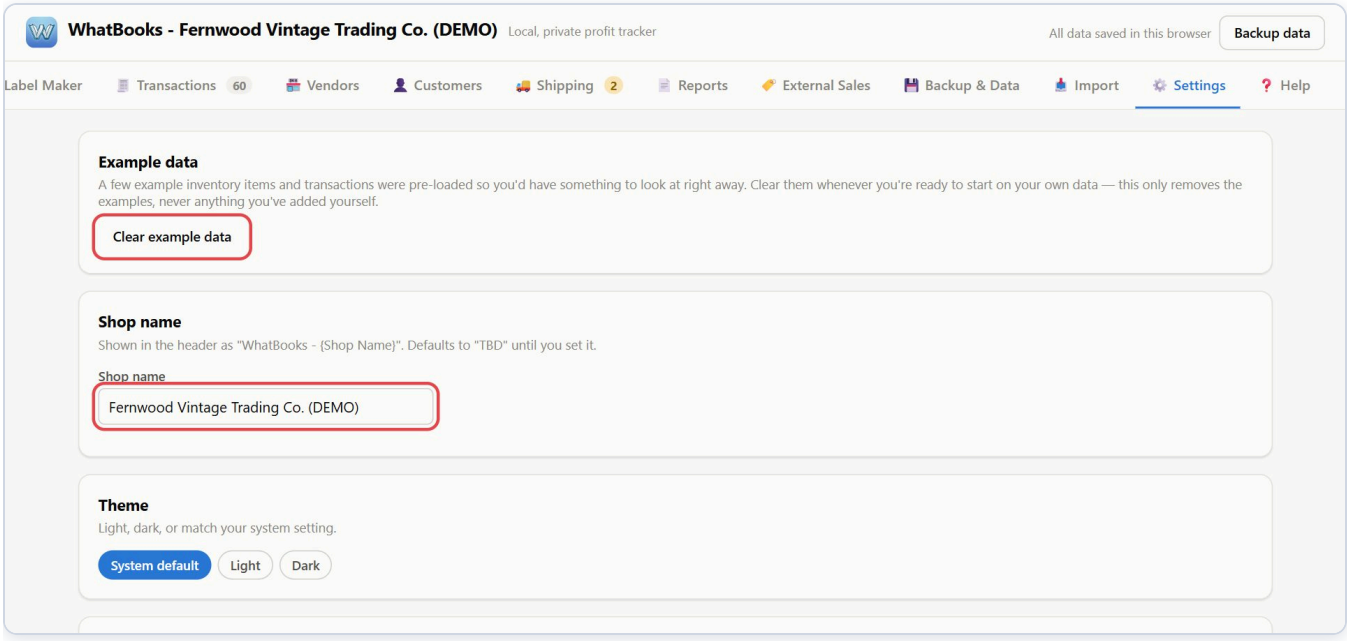


Figure 1. Settings: type your shop name (it appears in the page header). The Example data card, with its Clear example data button, is at the very top while example data is still loaded.

2. Where your data lives (and what that means)

- **Your books stay on your device.** Transactions, inventory, expenses, shows and photos are stored in your browser (and, if you choose, in a folder on your computer). They are not stored on WhatBooks servers.
- **Your account is separate.** Signing in only identifies you and your plan. Signing out never deletes or changes your data.
- **Browser storage can be wiped.** "Clear browsing data", switching browsers or computers, or using a private window can remove what's stored in a browser. Protect yourself with a **backup** and/or a **local data folder** (below).
- **Local data folder (recommended).** Settings → Local data folder → **Choose a folder…**. WhatBooks then keeps your data and photos as real files in that folder, and re-reads that folder every time you open the app. Point it at a folder that's already synced (iCloud Drive, OneDrive, Dropbox) to carry your data between your own devices — but don't edit from two devices at once, because simultaneous edits aren't merged. Works in Chrome or Edge on a desktop computer. Until a folder is set, a red notice at the top of the app ("No backup folder is set…") and red text on that Settings card remind you; both go away once you choose a folder. The same red notice ("Your backup folder needs reconnecting…") appears when a folder is set but the browser needs you to allow access again (this can happen each time you reopen WhatBooks): go to Settings → Local data folder and click **Reconnect folder**.
- **Photos:** up to 8 per inventory item, kept on your device. They are **not** included in the backup file (it would be huge). A local data folder does protect them.
- **What leaves your device:** only two optional things. (1) The Whatnot listing export — photos on the items you export are uploaded temporarily so the CSV can contain Image URLs; those copies auto-expire after 7 days. (2) Questions you type to the **Help assistant** (below) are sent to our AI provider, Anthropic's Claude, so it can write an answer. Your books are never sent. Nothing else about your books is uploaded.

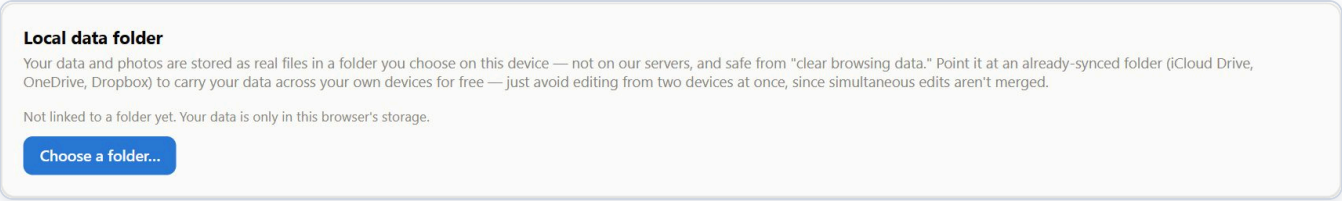


Figure 2. Settings → Local data folder: pick a folder once and WhatBooks keeps your data and photos there as real files.

3. The tabs

Which tabs you see depends on your plan: **Basic** (Dashboard, Show Analytics, Inventory, Transactions, Import, Backup & Data, Settings, Help), **Pro** adds Label Maker, Vendors, Customers, Shipping and Reports, and **Premium** adds External Sales. A tab marked PRO or PREMIUM in the menu is a preview of what that plan unlocks.

Dashboard

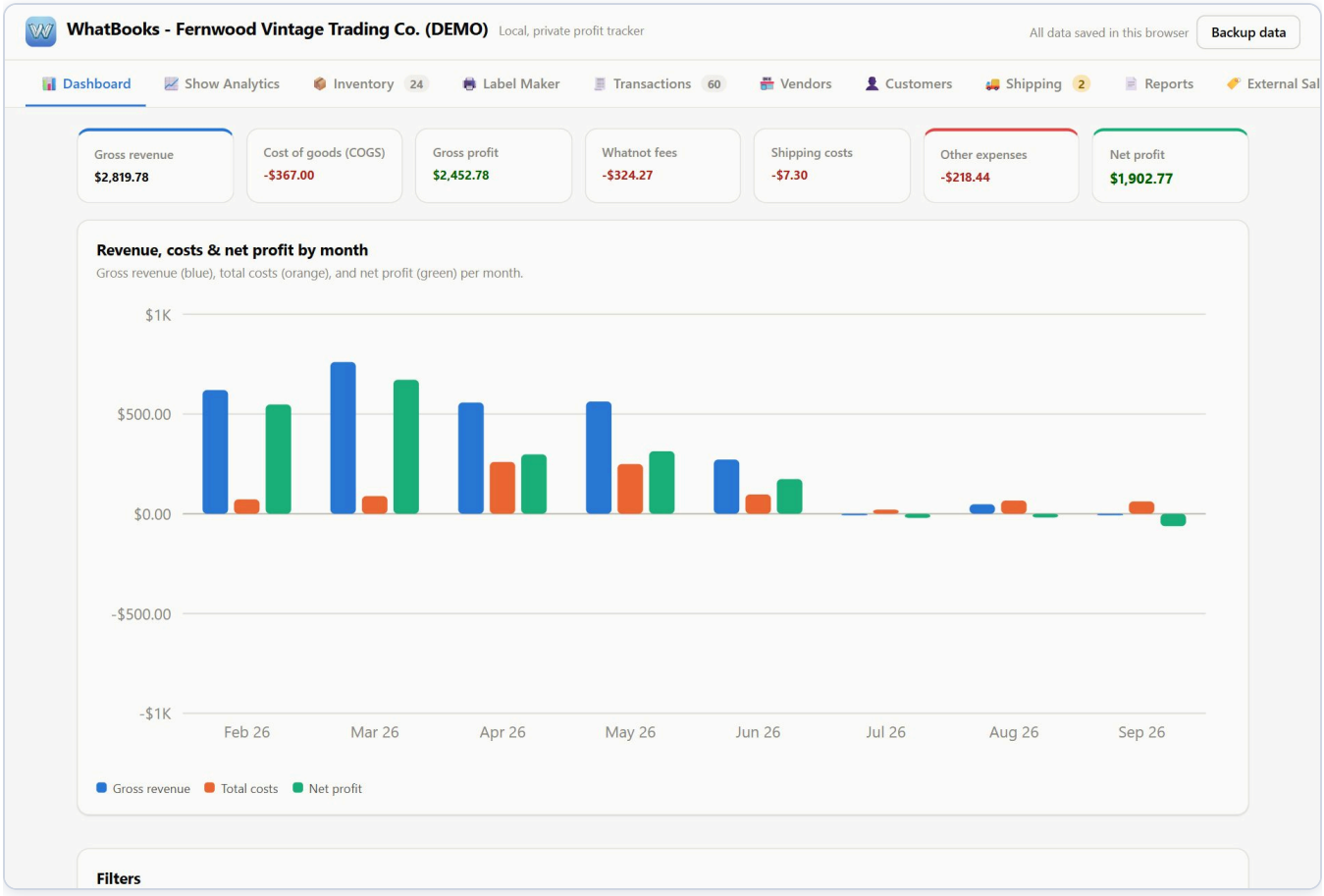


Figure 3. Dashboard: date filters and presets at the top, the profit tiles, then the charts.

Your profit at a glance for any period.

- **Filters:** a search box, From/To dates, a Category filter, and date presets (Last 30d, Last 90d, YTD, Last 12mo, All time). **Include** chips switch Whatnot sales, Monthly statements, Whatnot purchases and Manual expenses on and off. Reset filters returns to everything.
- **Tiles:** Gross revenue, Cost of goods (COGS), Gross profit, Whatnot fees, Shipping costs, Other expenses and **Net profit**. How each is calculated is in section 5.
- **Charts:** Revenue, costs and net profit by month; Cumulative net profit; Costs and expenses by category. Hover any bar or dot for the exact figure.

- The filters also drive the Transactions table.

Transactions

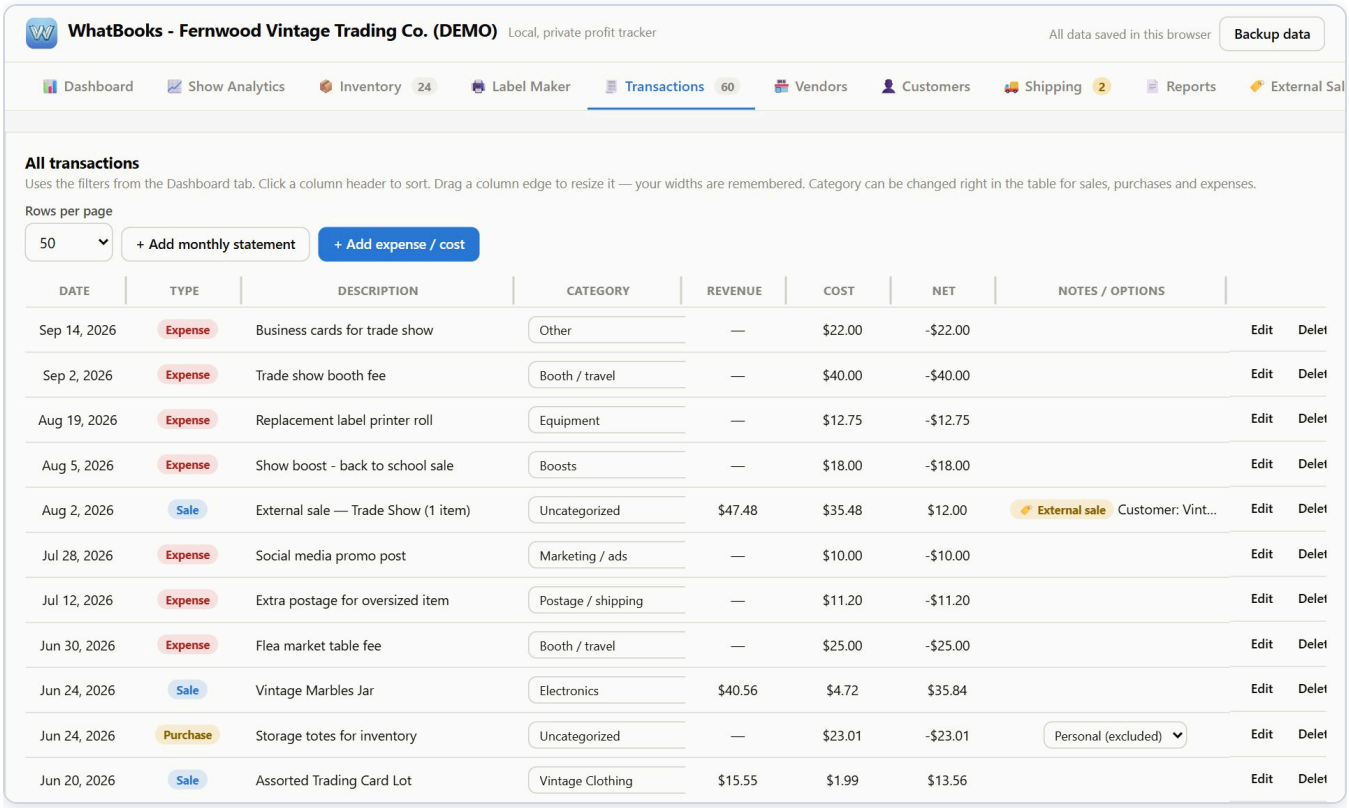


Figure 4. Transactions: every sale, purchase, expense and monthly statement in one sortable table. Add an expense or a monthly statement from the buttons above it.

Every sale, purchase, expense and monthly statement in one table.

- Click a column header to sort; drag a column edge to resize (your widths are remembered).
- **Category** can be changed right in the table for sales, purchases and expenses.
- **+ Add expense / cost** — Date, Category, Description, Amount, Notes. Built-in categories: Inventory (non-Whatnot), Shipping supplies, Packaging, Postage / shipping, Equipment, Software / subscriptions, Booth / travel, Marketing / ads, Boosts, Fees (other platform), Other. Add your own in Settings → Custom expense categories.
- **+ Add monthly statement** — type the totals from Whatnot's monthly "Financial Statement" PDF (see section 4).
- A sale can be edited (Date, Order ID, Item, Category, Quantity, Show, **Customer**, sale amount, shipping you paid, commission, processing fee, tax on fees). Editing a sale never changes the inventory item it's linked to.
- Whatnot **purchases** (things you bought as a buyer) start as **Personal (excluded)** so they don't count against your profit. Change a purchase to **Inventory** if you bought it to resell (it becomes cost of goods), or **Business expense** if it was a business cost.

Inventory

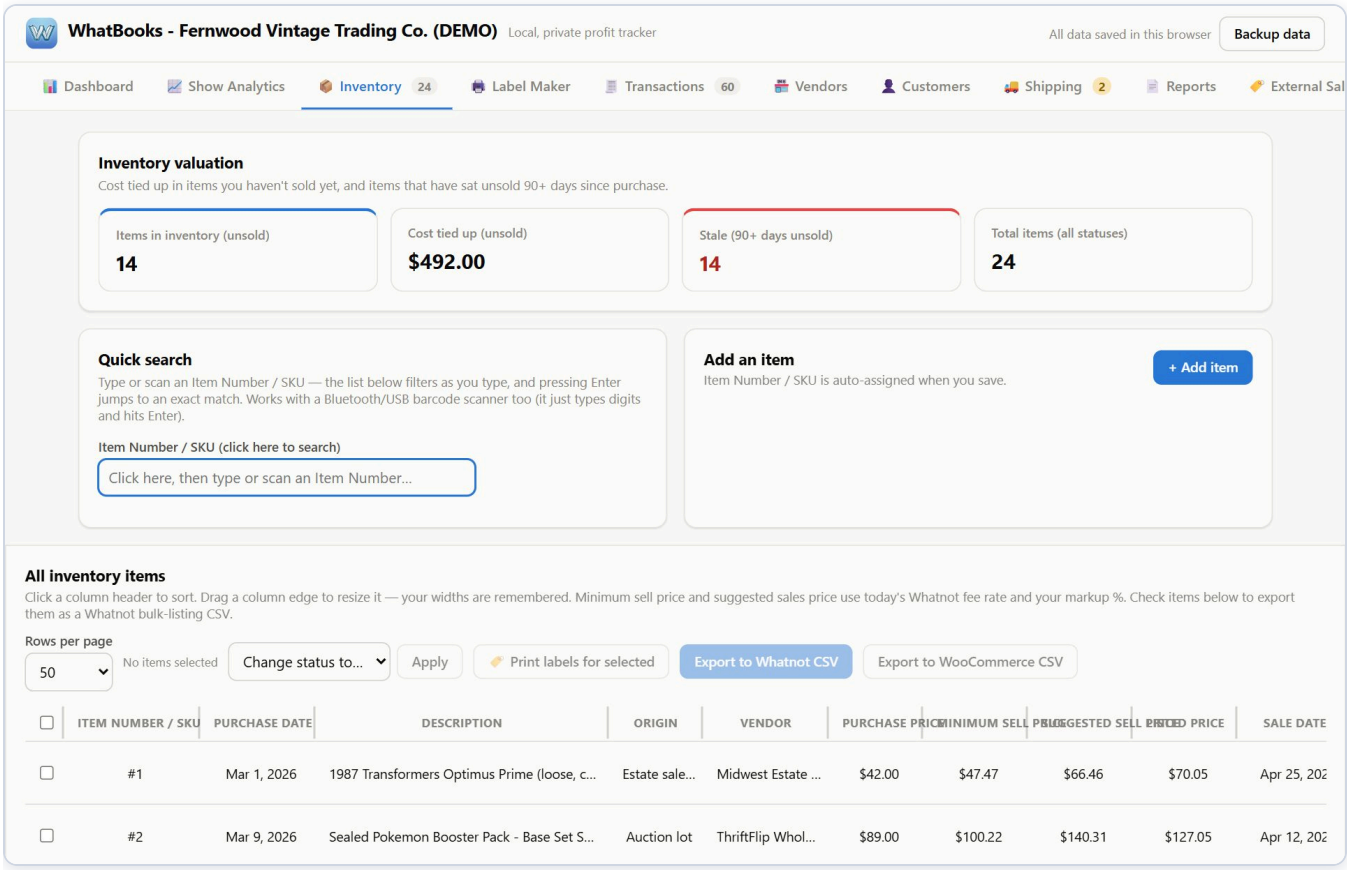


Figure 5. Inventory: tick items to change their status together, print labels, or export them to Whatnot as a CSV.

Everything you own and plan to sell.

- **Add an item** (+ Add item): the Item Number / SKU is assigned automatically. Typical fields are purchase date, description, origin, vendor/source, purchase price, listed price, status and photos. An optional markup % override changes the suggested price for just that item.
- **Status:** In inventory → Listed in shop → Sold. Select rows with the checkboxes and use **Change status to…** to move several at once.
- **When you mark an item Sold**, WhatBooks looks for a matching Whatnot sale within a few days of the sell date you enter (default ± 3 days — change it in Settings → Sale-matching window) and links them so cost and margin line up. If several sales could match, you pick; WhatBooks never guesses.
- **Minimum sell price** and **Suggested sell price** use today's Whatnot fee rate and your markup %.
- **Quick search:** type or scan an Item Number / SKU; the list filters as you type and Enter jumps to an exact match. A USB or Bluetooth barcode scanner works because it simply types the digits and presses Enter.
- **Bulk-add from Excel/Sheets:** paste tab-separated rows copied from a spreadsheet. The column order is set in Settings → Bulk-add column order (default: purchase date, description, origin, vendor, cost). Use **Preview** before adding.

- **Whatnot listing details** (Category, Sub Category, Shipping Profile, Condition, Hazmat, Type, Quantity) can be saved on an item so you can **Export to Whatnot CSV** — check the items you want, then export a bulk-listing file for Whatnot.
- **Export to WooCommerce CSV** writes the checked items in the format WooCommerce's own product importer reads (WooCommerce → Products → Import), so you can list them on your own online store. Each item becomes a simple product: the Item Number is the SKU, the description is the name, the listed (or suggested) sales price is the price, the quantity is the stock, the weight is converted from ounces to pounds, the Whatnot category becomes the product category and the origin becomes a tag. Photos are uploaded like the other exports and added as image links, which last 7 days, so import the file soon after exporting. Your cost is never included.
- **Print labels for selected** opens the Label Maker with those items (Pro).
- The tiles at the top show items in inventory, cost tied up, stale items (90+ days unsold) and total items.

Show Analytics

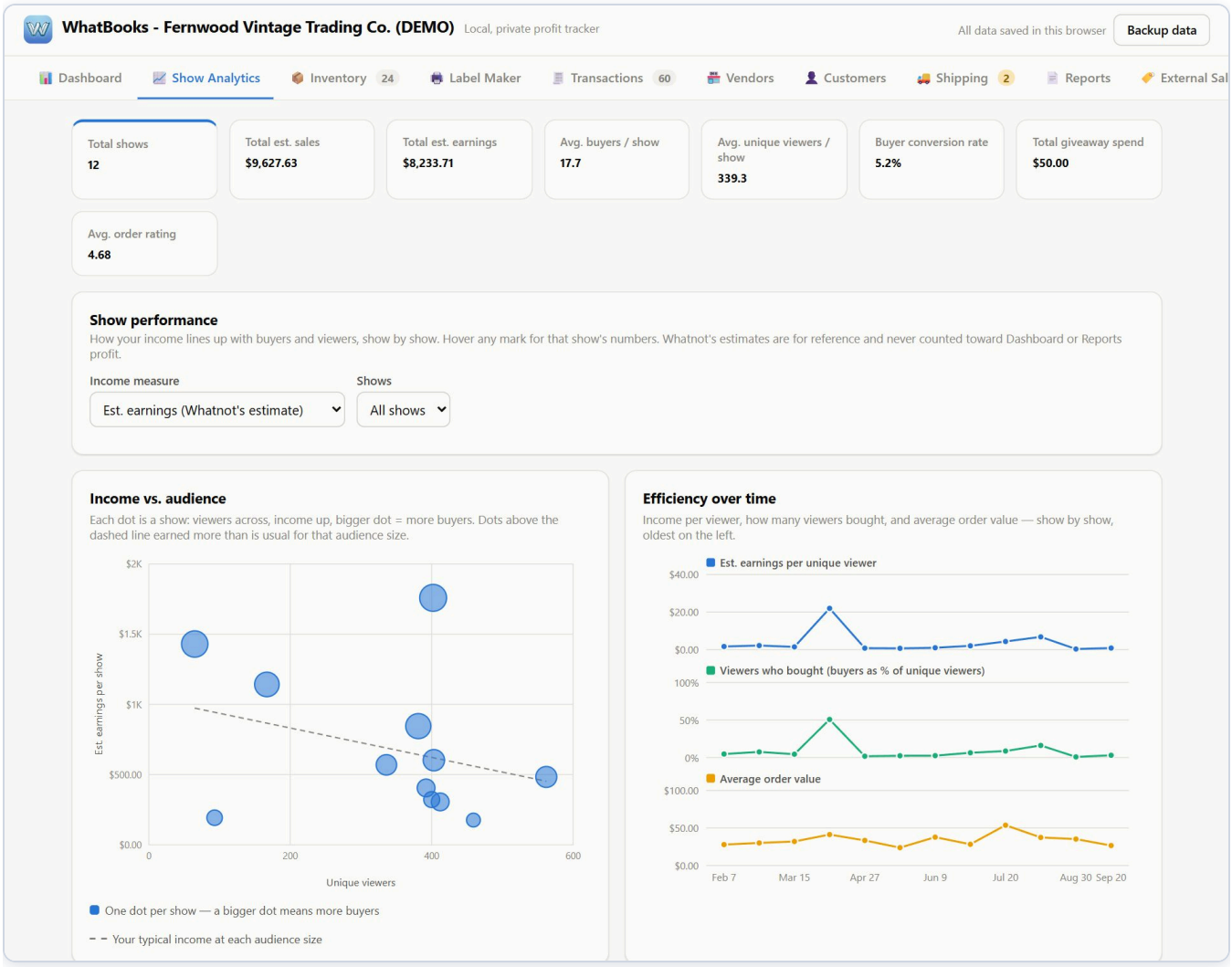


Figure 6. Show Analytics: the Show performance charts compare your income with your buyers and viewers, show by show.

Per-show performance from Whatnot's Show Analytics, with charts that compare your income to your audience.

- **Tiles:** total shows, total estimated sales and earnings, average buyers and unique viewers per show, buyer conversion rate, giveaway spend, average order rating.
- **Show performance charts** — use the **Income measure** list (Whatnot's estimated earnings, Whatnot's estimated sales, or **Your net profit** from your own sales) and **Shows** (all / latest 40 / latest 20):
  1. **Income vs. audience** — one dot per show: viewers across, income up, bigger dot = more buyers. The dashed line is your typical income for each audience size; dots above it beat your norm.
  2. **Income, buyers and viewers** — three strips on the same show-by-show axis (oldest left) so you can see them rise and fall together.
  3. **Efficiency over time** — income per viewer, the share of viewers who bought, and average order value.
  4. **New vs. returning buyers** — stacked bars; hover for the percent returning.
- A number Whatnot didn't report is left out of a chart (never drawn as zero), and a note says how many shows were left out. **Your net profit** needs your sales to be tied to the show (see Troubleshooting).
- The **table** lists every show, including **Your sales** and **Your net profit** columns.
- **Estimated vs. actual, by day** compares Whatnot's estimates with the revenue actually in your books, by calendar day (days with several shows are combined).
- Whatnot's estimates are shown for reference only and are **never** counted in Dashboard or Reports profit.

Import

Where Whatnot data comes in. Full walkthrough in section 4.

Label Maker (Pro)

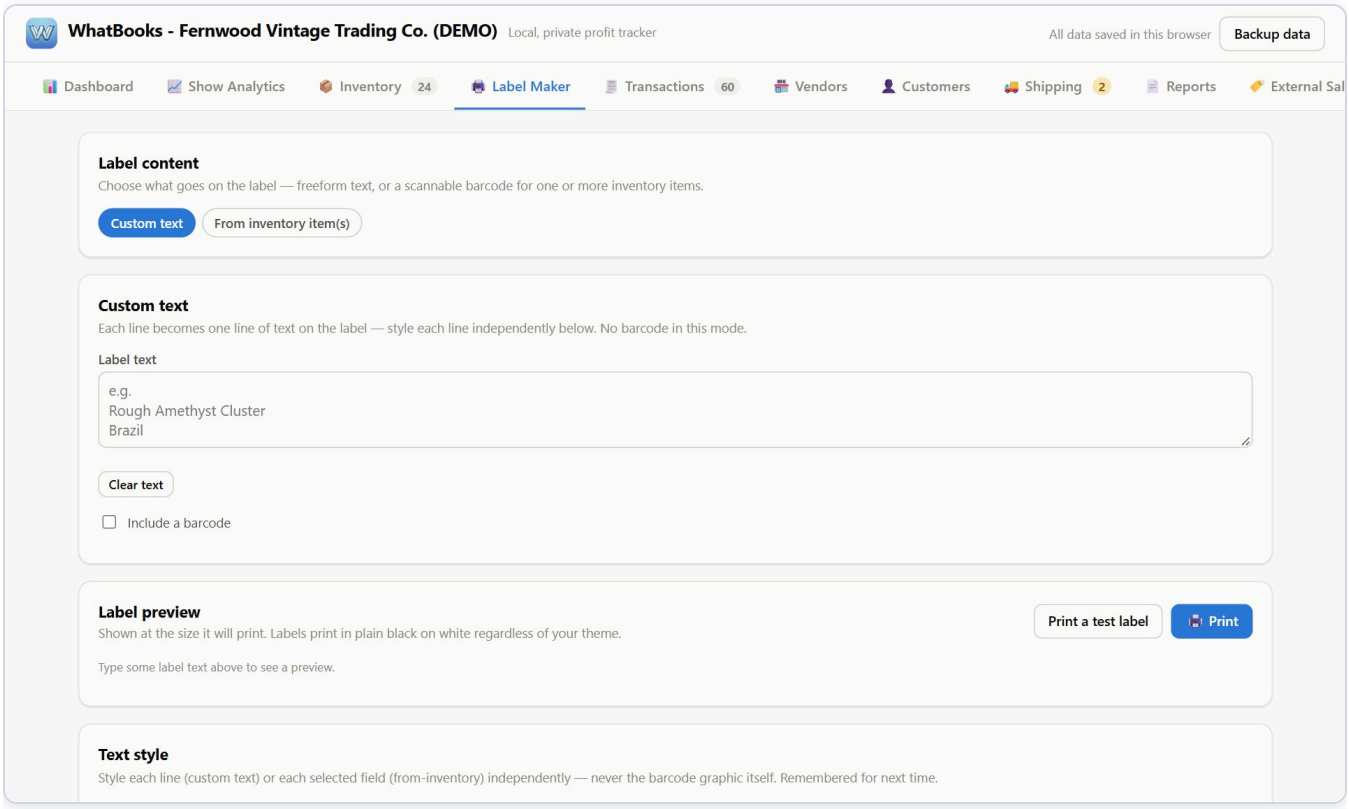


Figure 7. Label Maker: custom text or inventory items, with a scannable barcode of each Item Number / SKU.

Print price and SKU labels.

- Choose **Custom text** (each line becomes a line of text; optional barcode) or **From inventory item(s)** (search by Item Number or description, tick one or more).
- Each inventory label gets a scannable barcode of its Item Number / SKU — scan it later in Inventory quick search.
- **Label fields** choose what appears and in what order. The **Label preview** sits right above **Text style**, so you see each change as you make it; **Text style** styles each line independently. Both are remembered.
- **Label size & quantity:** Avery 5160 (1" × 2.625"), Avery 5163 (2" × 4"), small square (1" × 1"), roll label (2" wide × 1" tall), thermal barcode tag (1.25" × 2.25"), a thermal label 40 × 30 mm, or a custom size; choose how many copies of each. **Size units** switches the custom width and height (and the size shown under the preview) between inches and millimeters; the same size is kept when you switch.
- **Print too high or too low on the label?** Under **Label size & quantity**, **Move the print down** and **Move the print right** nudge everything on the label (a negative number moves it up or left). Down and right are the label's own, as you see them in the preview, however the label is turned. The setting is remembered; **Print a test label** shows the result. Anything moved past the edge of the page is cut off.
- **Labels coming out sideways?** Many label printers feed the label the other way round. In **Label size & quantity**, use **If your label printer prints the labels sideways** and pick **Turn each label 90° to the right** (or **to the left**, or **upside down**); the page size sent to the printer is turned to match. Check the

print preview in the print window: the label should look upright. If the turn makes no difference (some printer drivers ignore the page size they are sent), choose **Let my printer decide** under **Page size sent to the printer**: WhatBooks then sends no page size, and you pick the paper size (the one that matches your roll) and the **Layout** (Portrait or Landscape) in the print window's **More settings** until the preview looks right. **Print a test label** (above the preview) prints ONE label with an arrow at the top and its size, so you can check without using up the roll. The choices are remembered.

- Labels print black on white whatever your theme.

Vendors (Pro)

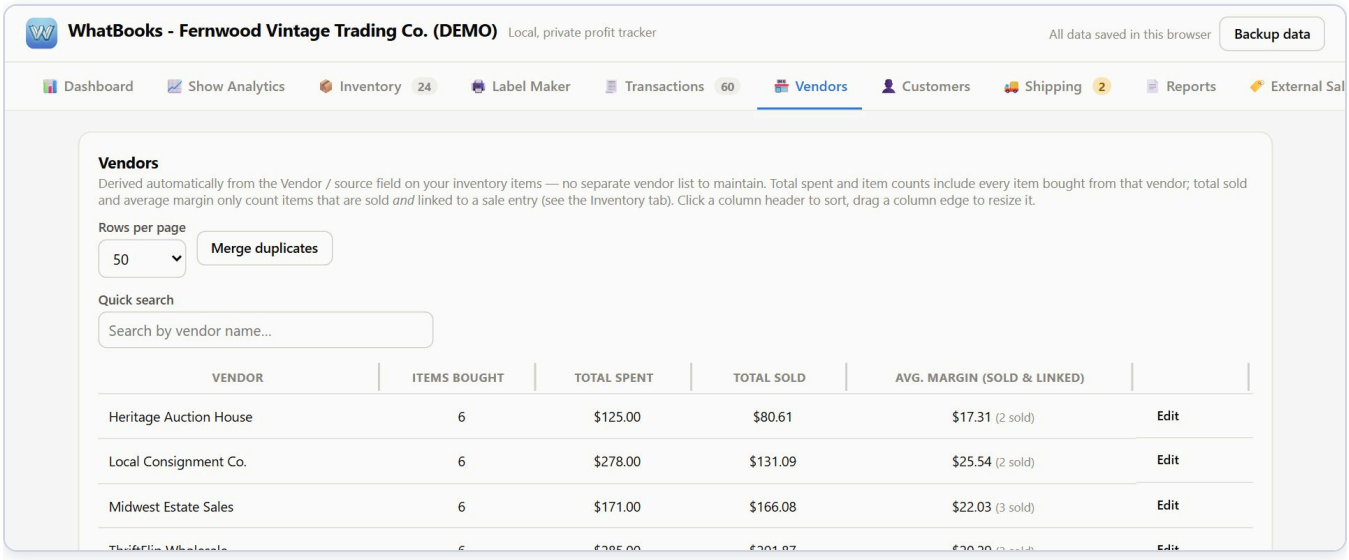


Figure 8. Vendors: built automatically from the Vendor / source on your inventory items.

Built automatically from the **Vendor / source** on your inventory items — there's no separate list to maintain. Shows items bought, total spent, total sold and average margin (sold items that are linked to a sale). Use **Merge duplicates** to combine spelling variants.

Customers (Pro)

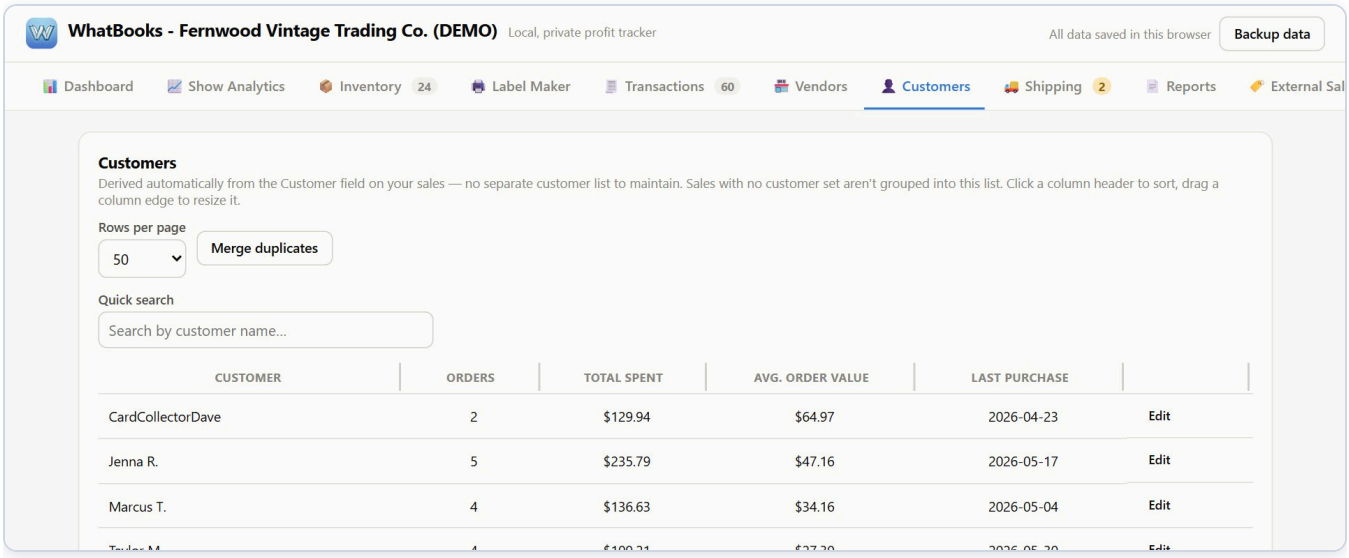


Figure 9. Customers: built automatically from the Customer on your sales.

Built automatically from the **Customer** on your sales. Shows orders, total spent, average order value and last purchase. Sales with no customer aren't grouped. When your imports include buyer names (Weekly Order Reports do), this fills itself. **Merge duplicates** combines variants.

Shipping (Pro)

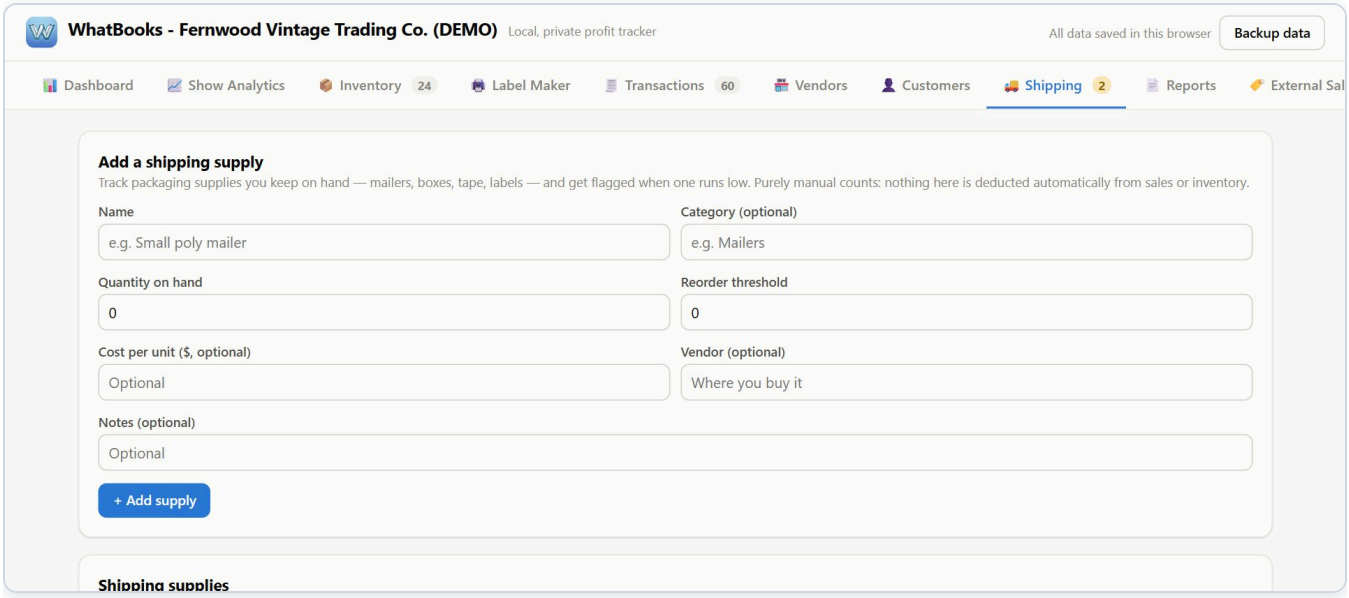


Figure 10. Shipping: packaging supplies with a reorder threshold; rows at or below it are flagged as low stock.

Track packaging supplies — mailers, boxes, tape, labels. Set a quantity on hand and a reorder threshold; rows at or below the threshold are flagged low stock. Counts are manual (use + / − for a quick adjustment): nothing is deducted automatically from sales or inventory.

Reports (Pro)

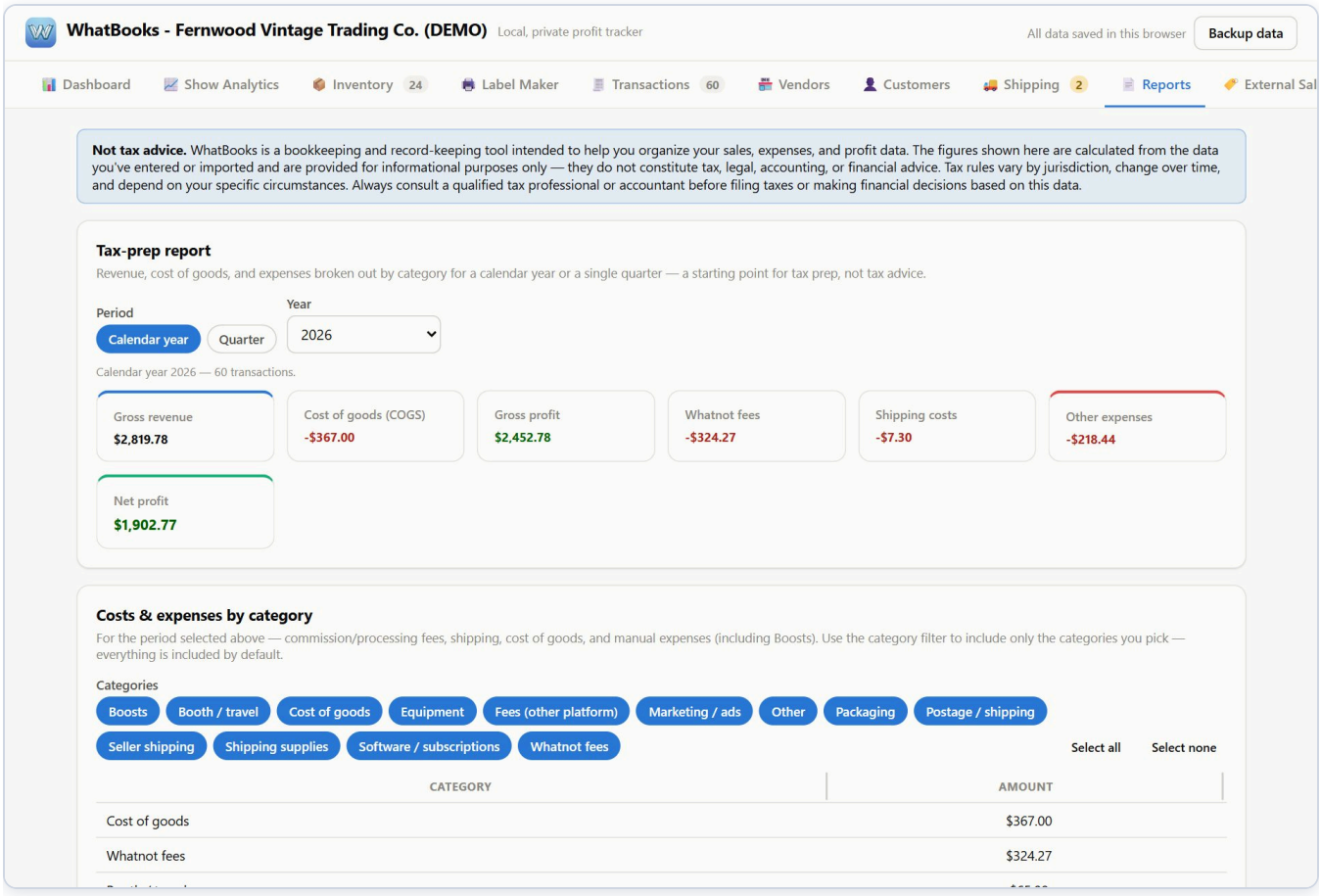


Figure 11. Reports: the tax-prep report by year or quarter, costs and expenses by category, and Boost ROI.

- **Tax-prep report** — revenue, cost of goods and expenses by category for a calendar year or one quarter. A starting point for your tax preparer, not tax advice.
- **Costs & expenses by category** — with a category filter (everything included by default).
- **Revenue vs. Boost spend by month** and **Boost ROI detail** — revenue per boost dollar. It's a rough gauge only; it can't tie a specific sale to a boost because Whatnot doesn't report that.

External Sales (Premium)

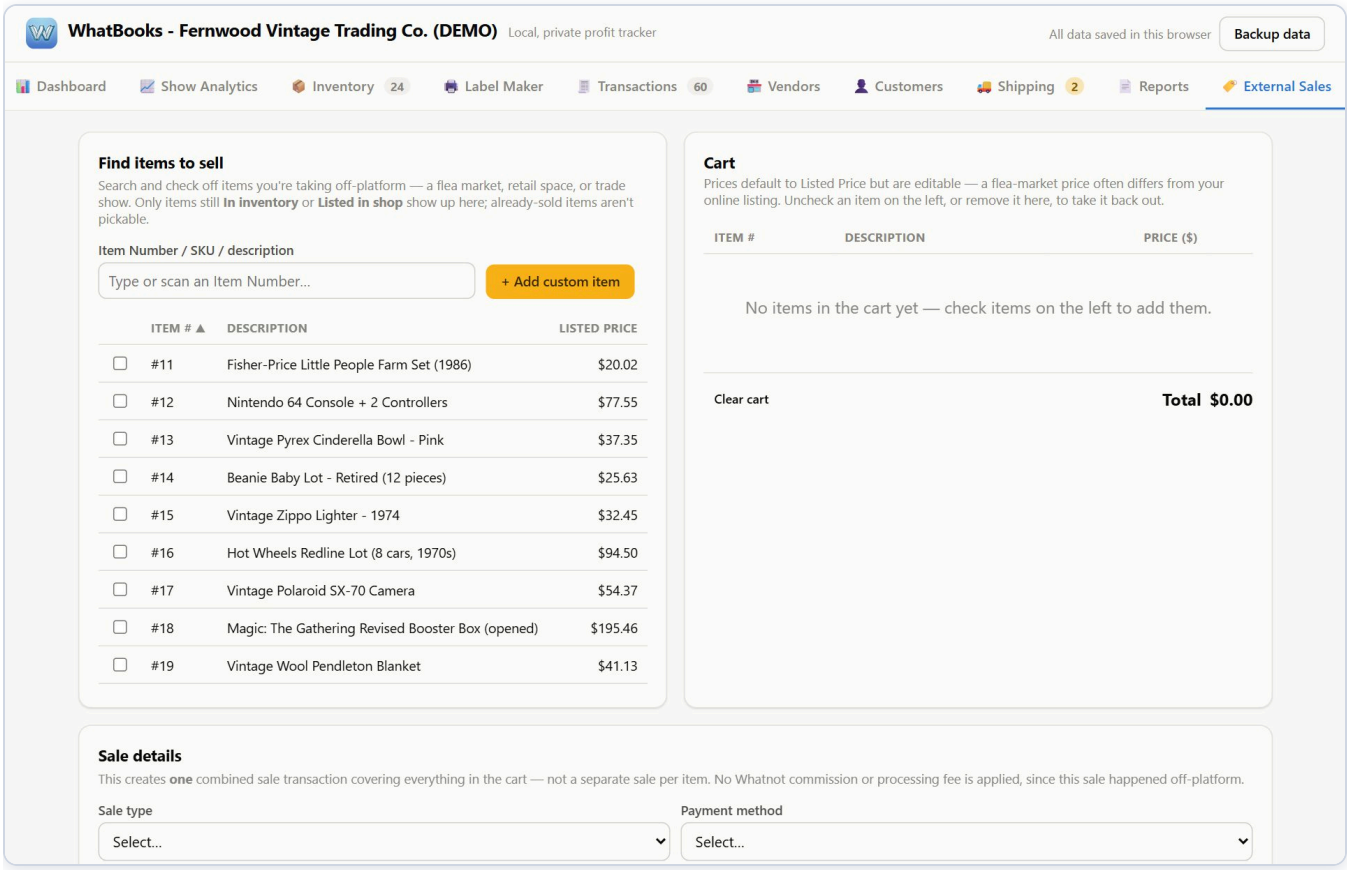


Figure 12. External Sales: pick the items you are taking, set the sale type and payment method, and Complete Sale.

Log sales made off Whatnot — flea markets, retail space, trade shows.

1. Search and tick the items you're taking (only items that are In inventory or Listed in shop appear), or **+ Add custom item**.
2. Adjust prices in the cart if the in-person price differs from your listing.
3. Choose Sale type (Flea Market, Retail Space, Trade Show, Other), Payment method (Cash, Card (PayPal / Square), Other), optionally a customer and notes, then **Complete Sale**.

It creates one combined sale for the whole cart. No Whatnot commission or processing fee is applied because the sale happened off-platform. When the Payment method is **Card (PayPal / Square)** and a card reader account is connected (Settings → Connect a card reader account), the Complete Sale button is replaced by **Check for completed transaction**, which looks in PayPal (Zettle) or Square for a matching payment so you're not just trusting that it was collected. Only one reader can be connected at a time.

Backup & Data

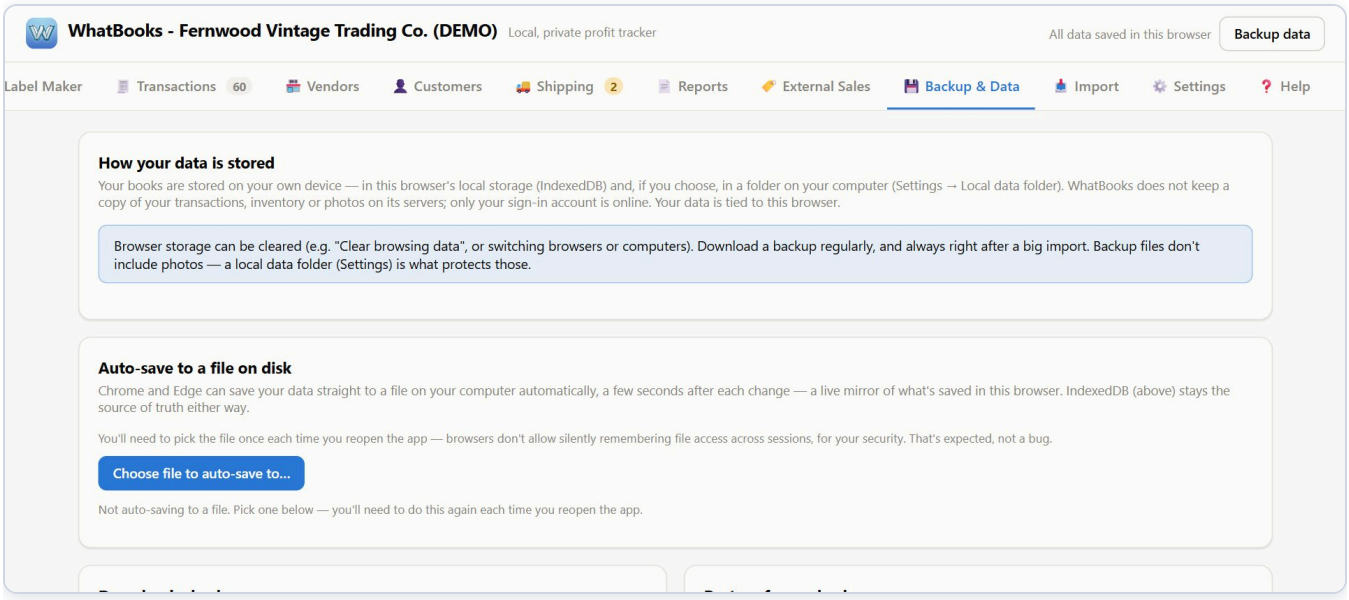


Figure 13. Backup & Data: Download backup (.json) saves everything except photos into one file. Do it after every big import.

Backups, automatic file saving, storage details and the "Erase all data" button — see section 7.

Upgrade Access / Pricing

Upgrade Access (signed-in accounts below Premium) lets you buy a higher plan; payment is handled by PayPal and your plan updates automatically within a few seconds. **Pricing** appears in the read-only preview tour.

Settings

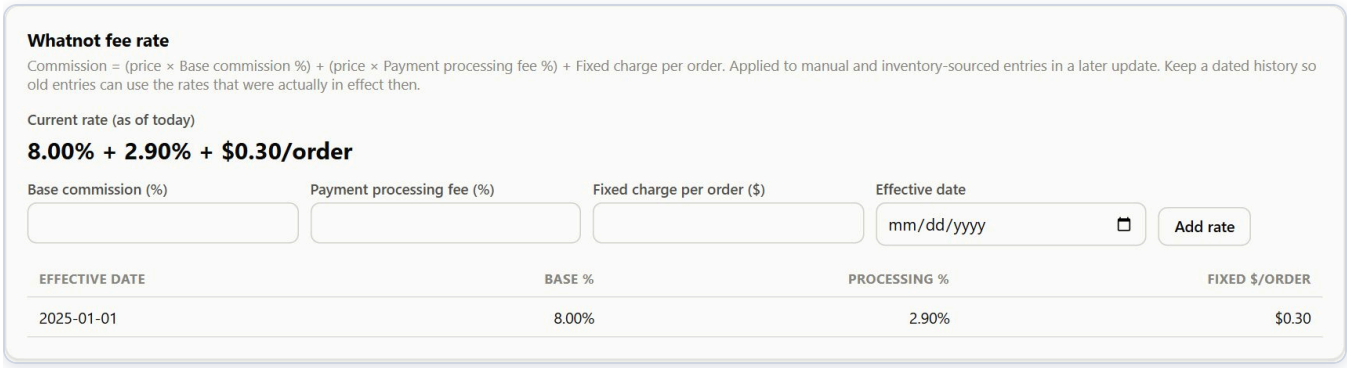


Figure 14. Settings → Whatnot fee rate: keep a dated history of rates so older sales use the rates that were in effect.

- **Shop name** · **Account** (signed-in email and plan; set a password to sign in with email + password instead of an emailed sign-in link).
- **Local data folder** (section 2) · **Theme** (light, dark, or match your system).

- **Inventory row colors** by status.
- **Whatnot fee rate** — Base commission %, Payment processing %, Fixed charge per order, with an **effective date**. Add a new rate to keep a dated history so older entries use the rates that were in effect then.
- **Default seller markup %** — used by the suggested-price calculator.
- **Sale-matching window** (± days) · **Bulk-add column order** · **Custom expense categories**.
- **Photo uploads** — handled automatically for your account.
- **Connect a card reader account** (Premium) — PayPal (Zettle) or Square.
- **Take the tour** — replays the quick walkthrough.

Help

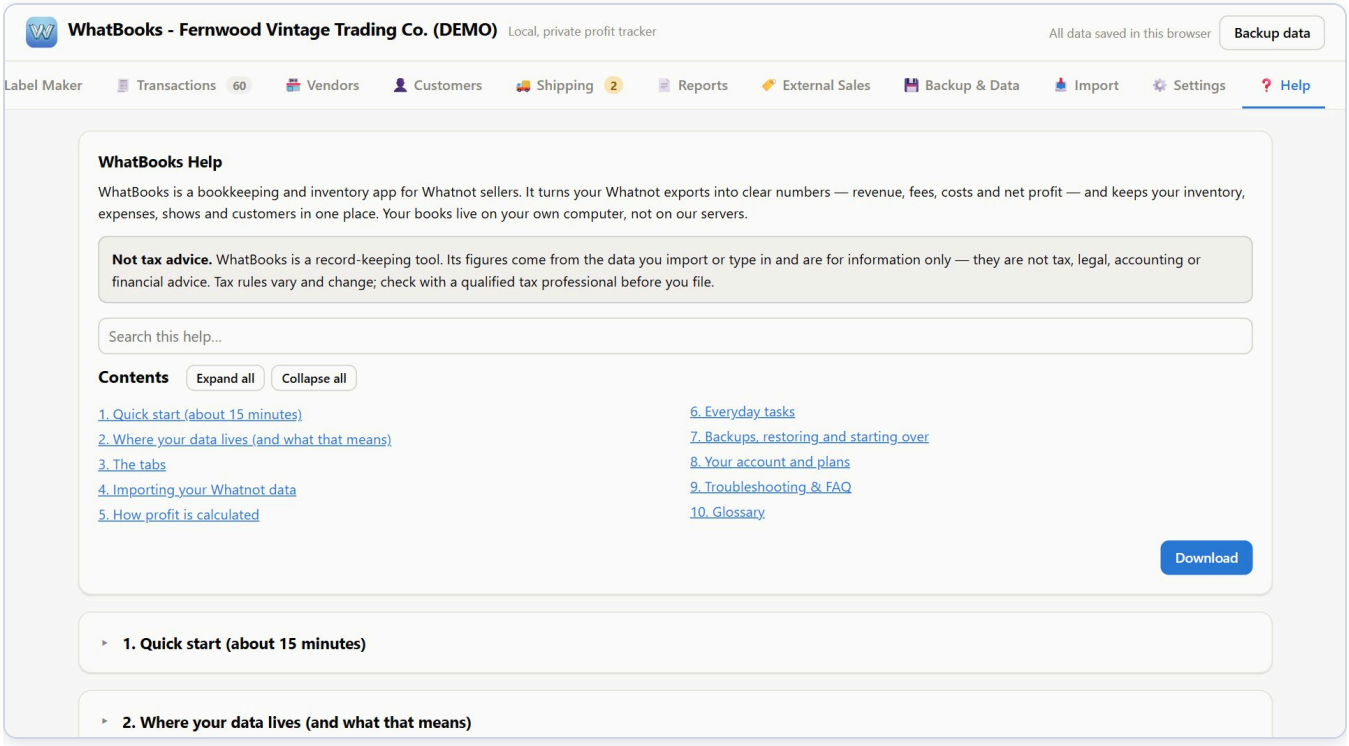


Figure 15. Help: search, open a section from the Contents list, or Download this help as a PDF.

This page — plus the **Help assistant**, a chat helper for signed-in accounts. Click **Ask for help** at the bottom-right of the app (or **Ask the assistant** at the top of this page), type a question in plain English, and press Enter. It answers questions about using WhatBooks and importing your Whatnot data. Things to know:

- **Download** (bottom right of the Contents card at the top of this page) saves this whole help as a PDF with screenshots — handy for printing or reading offline. The sections are collapsed until you open them; **Expand all** opens everything.
- It **can't see your books, screen or account**, so it can't look anything up for you — tell it what you're seeing (for example the message in an import preview).

- It's an AI: it can make mistakes, so double-check anything important against this page. It doesn't give tax or legal advice.
- Each account has a **daily and a monthly limit** on questions; the chat shows how many you have left today. The limits reset automatically.
- **Privacy:** the question you type (not your books) is sent to our AI provider to generate the answer. Don't type passwords, card numbers or other secrets.
- For billing, your account or a bug, email support@diggingoutdoors.com.

4. Importing your Whatnot data

The best order

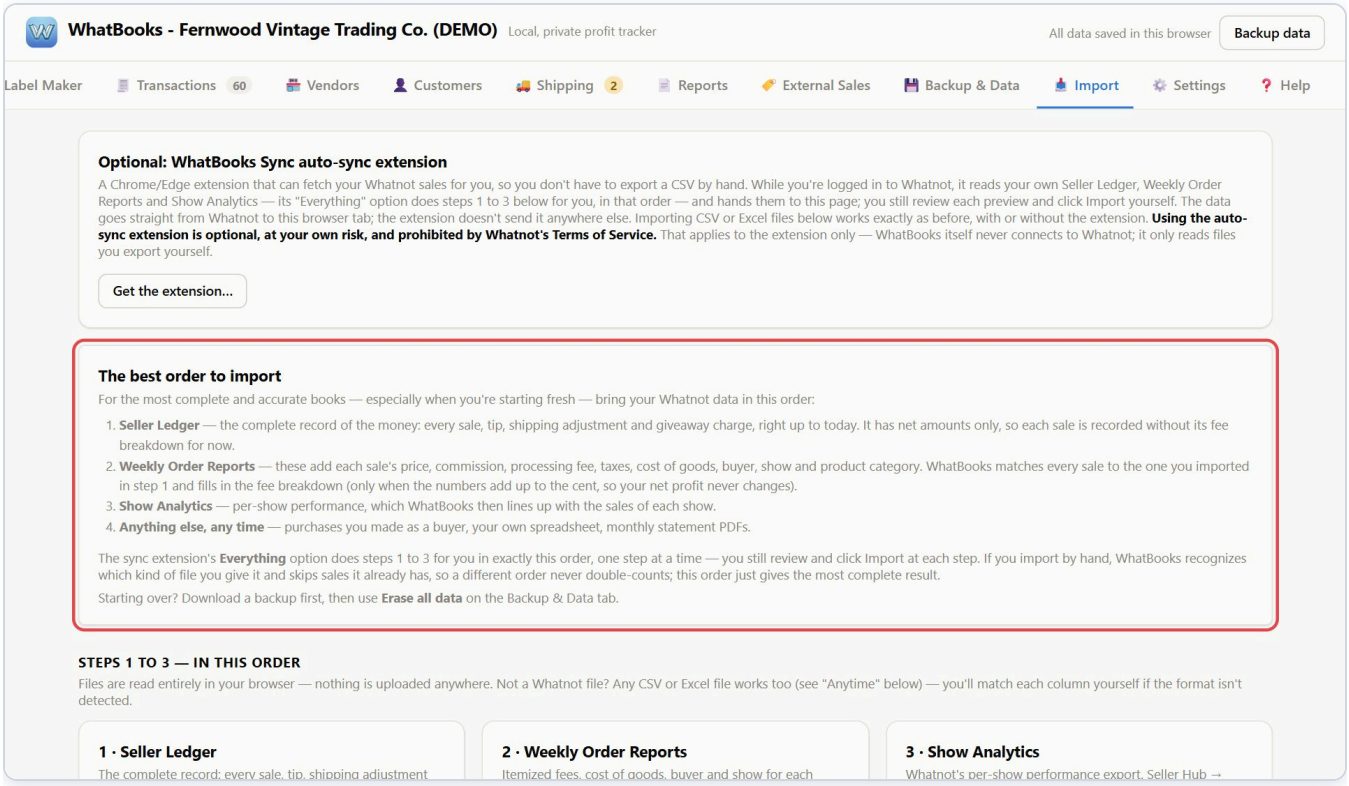


Figure 16. The Import tab, in the order to use it: 1 · Seller Ledger, 2 · Weekly Order Reports, 3 · Show Analytics. The blurb at the top explains why.

1. **Seller Ledger** first. It's the complete record of money in and out — every sale, tip, shipping adjustment and giveaway charge, right up to today. It has net amounts only, so at first each sale is recorded without a fee breakdown.
2. **Weekly Order Reports** second. They add each sale's price, commission, processing fee, taxes, cost of goods, buyer, show and product category. WhatBooks matches every sale to the one you already imported and fills in the fee breakdown (see "Itemizing" below).
3. **Show Analytics** third.
4. **Anything else, any time:** purchases you made as a buyer, your own spreadsheet, monthly statement PDFs.

You can import in a different order — WhatBooks recognizes sales it already has and never double-counts them — but this order gives the most complete result.

Step 1 — Seller Ledger

Whatnot: Seller Hub → **Finances** → **Ledger** → Edit Dates → **Export Data**. One file covers any date range, so choose your whole history the first time. Then, in WhatBooks: **Import** tab → drop the file on **1 · Seller Ledger**.

Step 2 — Weekly Order Reports

Whatnot: Seller Hub → **Finances** → **Statements & Reports** → Weekly Order Report → **Download CSV**. There is one file per finished week (the latest week appears Monday morning). Import them one after another by dropping each on **2 · Weekly Order Reports**.

Step 3 — Show Analytics

Whatnot: Seller Hub → **Analytics** → **Shows** → pick a date range → click the download icon (top right of the list). Whatnot's download only includes the shows currently on screen, so if you have more than 25, raise the "Show 25" page size at the bottom first (or download page by page). Drop the file on **3 · Show Analytics**. Importing an overlapping range is safe: shows already on file are skipped or updated, never duplicated. (The sync extension below gets every show at once.)

Purchases (as a buyer)

whatnot.com → your profile → **Buying** → **Purchases** → Download Purchase History as CSV, set a date range, download. This only works from a desktop browser, not the mobile app. Drop it on **Purchases — as a buyer**. They start as Personal (excluded from profit); mark the ones that were inventory or business costs.

Monthly PDF statement

Seller Hub → **Finances** → **Statements & Reports** → Monthly Statement → **Download PDF** (last month's appears on the 4th). Drop it on the **Whatnot's monthly PDF statement** card: WhatBooks reads it in your browser and opens the statement form pre-filled — review it and click Save. Or choose **+ Add a monthly statement manually** and type the totals in. One statement per month.

Your own Excel spreadsheet

Already track sales or purchases in Excel? Use **Import from your own Excel spreadsheet**: choose the .xlsx file, pick the sheet, say whether each row is a Sale or a Purchase, confirm which row holds your column headings, then match your columns to WhatBooks' fields. (An older .xls file: in Excel choose Save As → Excel Workbook first.) Any CSV also works — you match the columns yourself if the format isn't recognized.

Reading the import preview

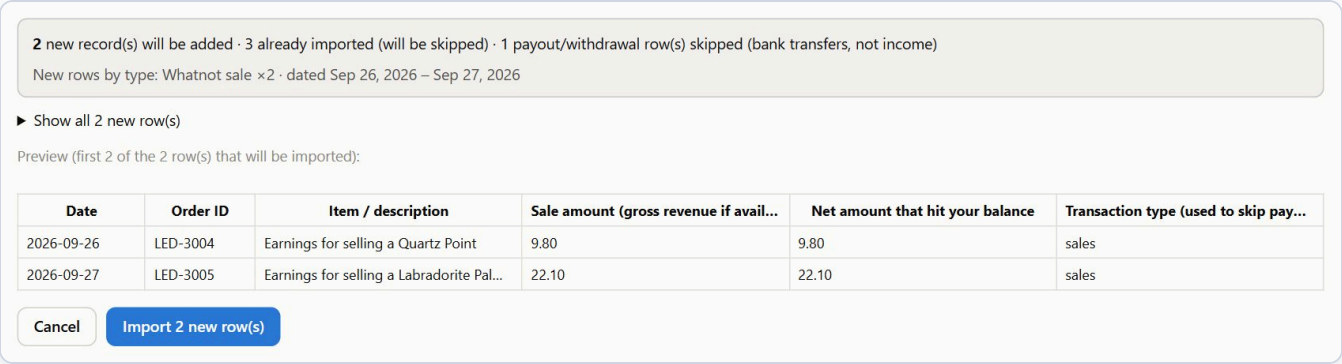


Figure 17. Choosing a Seller Ledger file shows a preview before anything is saved: how many rows are new, how many were already imported (skipped), and which rows are payouts (skipped).

Nothing is saved until you click **Import**. First you confirm the column matching (WhatBooks matches what it can automatically), then the preview tells you how many rows are **new**, how many are **already imported**, how many **payout/withdrawal rows were skipped** (transfers to your bank — not income or expenses), and how many were skipped for a missing date or amount. A few details:

- **"Skipped — order already in WhatBooks from a Seller Ledger/Weekly Order Report file"** — that sale is already in from the other kind of Whatnot file, so importing it again would count it twice. The "skip those rows" box is ticked by default; untick it only if you really want both.
- **Rows dated inside the period your Ledger already covers** are flagged with ⚠ so you can check them.
- A **net check** warns if the profit WhatBooks calculates for the file differs from the net Whatnot says it paid.
- Re-importing the same file never creates duplicates.

Itemizing (Ledger sales upgraded from the weekly report)

When a Weekly Order Report covers a sale you already imported from the Ledger, WhatBooks can restate that sale as the full price plus each fee (commission, processing fee, taxes), so your gross revenue and fees match what Whatnot's statements show. It only does this when the report's net equals the Ledger's net to the cent **and** its fee columns add up to that net — so your net profit cannot change. The preview shows "net profit $X before, $X after". Anything that doesn't line up is left exactly as the Ledger had it. Right after importing you'll see an **Undo itemizing** button; the original Ledger figures are always kept.

What gets recorded

- **Giveaway charges and coupons** Whatnot deducts are treated as costs (they appear under "Other expenses" and as "Giveaways & coupons" in the cost breakdown), not as negative sales.
- **Tips and shipping adjustments** import as their own kinds of transactions.
- **Buyer name, show, product category, buy format and SKU** are saved when the file has them. Importing a Weekly Order Report later fills in these blanks on sales you imported earlier — it never overwrites something you typed.

The optional sync extension

"WhatBooks Sync" is a Chrome/Edge extension that reads your own Whatnot seller data while you're logged in and hands it to your open WhatBooks tab, so you don't have to download CSVs by hand. **You still review each preview and click Import yourself.**

- **Important:** Whatnot's Terms of Service prohibit automated use of its site, so using the extension is optional and **at your own risk** — your Whatnot account could be affected. That applies to the extension only; WhatBooks itself never connects to Whatnot and only reads files you export yourself. Manual CSV import is always available and is the safe alternative.
- **Install:** Import tab → **Get the extension…** → read the warning, tick the box, Continue → **Add WhatBooks Sync from the Chrome Web Store** → click **Add to Chrome** (in Edge, allow extensions from other stores if it asks) → pin it from the puzzle-piece menu. If you can't use the Chrome Web Store, the same window has a by-hand option: download the zip, unzip it, open `chrome://extensions` (or `edge://extensions`), turn on Developer mode, **Load unpacked**, and choose the unzipped folder.
- **Use:** keep your Whatnot Seller Hub tab and a WhatBooks tab open, click the extension icon, choose what to sync and how far back, and click Sync. Choose **Everything — in the right order (recommended)** to bring in the Seller Ledger, then the Weekly Order Reports, then Show Analytics.
- With Everything, WhatBooks opens the steps one at a time: **Step 1 of 2 — Seller Ledger**, then after you import it **Next: Weekly Order Reports ›** (which itemizes the sales you just imported). **Skip this step** moves on without importing; **Cancel** stops the remaining steps. Show Analytics gets its own review panel.
- Weekly reports on "Everything" cover about the most recent year (up to 60 weekly files).
- If a sync says you're not signed in, log in to Whatnot in that browser and try again. If it says Whatnot changed something, use Copy diagnostics in the extension and report it — Whatnot can change its site without notice.

5. How profit is calculated



Figure 18. The Dashboard tiles: Gross revenue, Cost of goods, Gross profit, Whatnot fees, Shipping costs, Other expenses and Net profit.

Number	What it is
Gross revenue	The sum of your sale prices, before fees, shipping or costs.
Cost of goods (COGS)	What the items cost you — from Whatnot's "Cost of Goods" field when present, Whatnot purchases you marked Inventory, and manual expenses in the "Inventory (non-Whatnot)" category.
Gross profit	Gross revenue − COGS.
Whatnot fees	Commission + payment processing fees (+ tax on those fees) charged by Whatnot.
Shipping costs	Shipping you paid as the seller, from your sales.
Other expenses	Everything manual that isn't inventory (supplies, software, travel…), Whatnot purchases marked Business expense, plus giveaway charges and coupons Whatnot deducted from your sales.
Net profit	Gross profit − Whatnot fees − shipping costs − other expenses.

- **Payouts** (bank transfers) are not income or expenses and are skipped on import.
- **Whatnot's estimates** (Show Analytics "Est. Sales / Est. Earning") are never part of these totals.
- If your Whatnot payout differs from WhatBooks' net profit, that's expected: payouts exclude your cost of goods and your own expenses, and cover different dates.
- With only the Seller Ledger imported, fees aren't broken out (the Ledger shows net amounts), but net profit is still right. Importing the Weekly Order Reports adds the breakdown.

6. Everyday tasks

- **Log an expense:** Transactions → **+ Add expense / cost**.
- **Log a month from the PDF:** Import → monthly PDF card (or Transactions → **+ Add monthly statement**).
- **Record that an item sold:** Inventory → set status to Sold (enter the sell date) → pick the matching sale if asked.
- **Fix a sale's customer or show:** Transactions → edit the sale. (Customers and Show tie-ins update automatically.)
- **Rename or merge vendors/customers:** Vendors or Customers tab → Merge duplicates / edit.
- **Print labels:** Inventory → tick items → **Print labels for selected** (or open Label Maker).
- **List items on Whatnot in bulk:** Inventory → tick items → **Export to Whatnot CSV**.
- **List items on your WooCommerce store:** Inventory → tick items → **Export to WooCommerce CSV**, then import the file in WooCommerce → Products → Import.
- **Change the fee rate:** Settings → Whatnot fee rate → **Add rate** (with an effective date).
- **See what Whatnot Boosts paid off:** add a monthly statement with the Boost amount, or log expenses in the Boosts category; then Reports → Boost ROI.

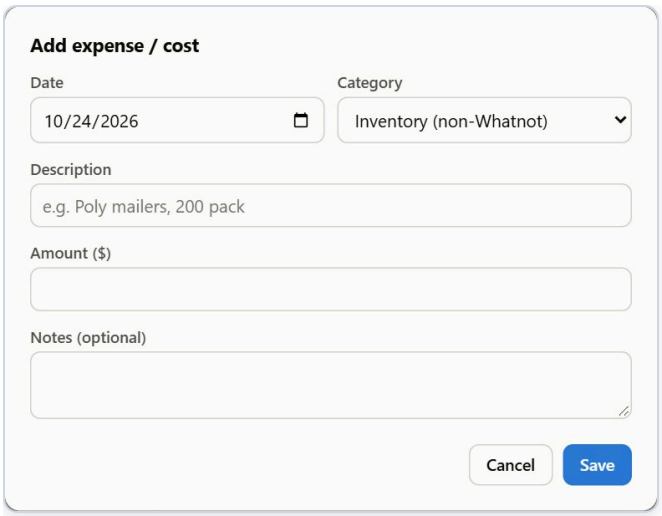


Figure 19. Transactions → + Add expense / cost: date, category, description, amount and notes.

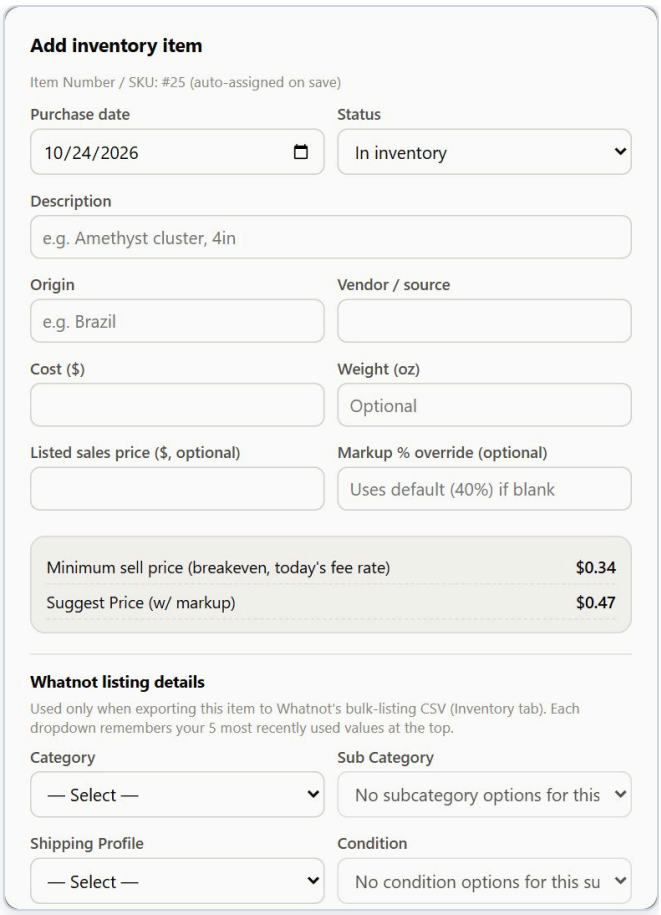


Figure 20. Inventory → + Add item: the Item Number / SKU is assigned automatically; the Whatnot listing details are optional.

7. Backups, restoring and starting over

- **Download backup (.json)** — Backup & Data → Download backup. It saves everything except photos into one file. Keep it somewhere safe (a cloud drive). Do it after every big import.
- **Restore from a backup** — Backup & Data → Choose backup file…. Existing entries are kept; only new ones from the file are added, so nothing is duplicated.
- **Auto-save to a file** — Chrome/Edge on a desktop can save to a file a few seconds after every change. You pick the file once each time you reopen the app (browsers don't allow remembering file access silently — that's normal).
- **Local data folder** — the most complete protection, including photos (section 2).
- **Erase all data** (Backup & Data → Danger zone) permanently deletes every transaction, expense, inventory item, item photo, Show Analytics record and shipping supply stored in this browser — and if you use a linked data folder, that folder's copy is emptied too. Your settings (shop name, fee rates, etc.) stay. **It can't be undone without a backup file** — and backups don't contain photos. Download a backup first.

8. Your account and plans

- Sign in with an emailed **sign-in link**, or set a **password** (Settings → Account) to sign in with email + password.
- Your plan (Basic, Pro or Premium) controls which tabs you can use. Upgrade from the **Upgrade Access** tab; PayPal handles payment and your plan updates automatically in a few seconds.
- One account is for one person; don't share your login or copy.
- The login page's **Take a tour** opens a read-only preview — nothing you click there is saved.
- Questions about your account or license: support@diggingoutdoors.com.

9. Troubleshooting & FAQ

My numbers don't match what Whatnot paid me. Payouts are bank transfers and are excluded; they also don't subtract your cost of goods or your own expenses, and they cover different dates. Compare Gross revenue and Whatnot fees against Whatnot's statement for the same dates instead. Also check giveaway charges and coupons — they're counted under Other expenses.

An import added fewer rows than I expected. Read the preview: rows can be **already imported**, **payout rows skipped**, **skipped because the order is already in from the other file type**, or **missing a date or amount**. Nothing is hidden — each skipped kind is counted.

I imported the Ledger and the weekly report and I'm afraid of double counting. WhatBooks matches by Whatnot order number, and tips/shipping adjustments by their description, amount and date, so the same sale isn't counted twice. If something looks doubled, check Transactions for two rows with the same order ID.

The Weekly Order Report step says some sales "can't be itemized". For those sales the report's numbers didn't match the Ledger to the cent, so they were left as the Ledger recorded them — your profit is unaffected. You can still see their fees on the report itself.

My labels print sideways. Many label printers feed the label the other way round. Open **Label Maker** → **Label size & quantity**, choose **Turn each label 90° to the right** (or **to the left**) under "If your label printer prints the labels sideways", and look at the print preview in the print window: the label should now look upright. If it is upside down, choose the other direction or **upside down**. If turning makes no difference, your printer driver is ignoring the page size WhatBooks sends: set **Page size sent to the printer** to **Let my printer decide**, press **Print**, open **More settings** in the print window and pick the paper size that matches your roll and the Layout (Portrait or Landscape) until the preview looks right. For example, on a Bluetooth thermal label printer (JD-668BT) with 2" × 1" roll labels, what fixed it was: **Roll label (2" wide × 1" tall)**, **Let my printer decide**, and in the print window Layout **Portrait** with the printer's own **2.00" × 1.25"** paper size. **Print a test label** prints just one label (an arrow marks the top, and a millimeter ruler runs along its edges so you can see how big it prints and where it stops) while you try. WhatBooks remembers your choices.

Show Analytics shows fewer shows than I have. Whatnot's own CSV only includes shows currently on screen (25 by default). Raise the "Show 25" page size and download again, or use the sync extension, which reads every show.

"Your net profit" is blank for some shows. Your sales need to be tied to the show: sales imported from Weekly Order Reports carry Whatnot's show ID; other sales are matched by show name and date. Shows with no matching sales are left out of the income charts, and a note tells you how many.

My data disappeared. The browser's storage was probably cleared or you opened WhatBooks in a different browser or profile. Restore your latest backup (Backup & Data → Restore). If you use a local data folder, reconnect it (Settings → Local data folder → Reconnect folder).

Folder or auto-save buttons are missing. Those need Chrome or Edge on a desktop computer.

The sync extension doesn't appear / won't sync. It works in Chrome and Edge on a desktop. Reload it at chrome://extensions, then reload your Whatnot and WhatBooks tabs. Make sure you're logged in to Whatnot and a WhatBooks tab is open.

Dashboard shows nothing. Check the Include chips and the date range (try "All time"), and use Reset filters.

Photos are missing after restoring a backup. Backup files don't contain photos. They're only protected by a local data folder or by backing up your computer.

I want to start completely fresh. Download a backup, then Backup & Data → Erase all data, then import in the order in section 4.

The Help assistant says I've reached my limit. Each account gets a limited number of assistant questions per day and per month, to keep the service sustainable. Try again tomorrow (the daily limit resets), search this page, or email support@diggingoutdoors.com. Everything else in WhatBooks keeps working.

There's no "Ask for help" button. The assistant is only for signed-in accounts on whatbooks.app, and it may be switched off temporarily. This page covers the same ground.

Can WhatBooks file my taxes or give tax advice? No. The Reports tab can prepare category totals to hand to your tax professional.

10. Glossary

- **Seller Ledger** — Whatnot's running record of money in and out; net amounts.
- **Weekly Order Report** — Whatnot's itemized per-week sales file (fees, cost of goods, buyer, show).
- **COGS** — cost of goods sold: what the items you sold cost you.
- **Itemized** — a sale shown with its full price and each fee separately.
- **Payout** — a bank transfer of your Whatnot balance (not income or expense).
- **Net profit** — what's left after cost of goods, fees, shipping and expenses.
- **SKU / Item Number** — the number WhatBooks assigns to each inventory item; it's what the barcode encodes.
- **Boost** — Whatnot's paid promotion of a show or listing.
- **Unique viewers / conversion** — the number of different people who watched a show; conversion is buyers as a share of them.