Configuration

Settings

After successful registration re you have to update settings according to your business like your business/shop name, logo etc.

Company Settings

This is a special setting which is only visible to user with **Admin** role or having permission **Company Settings**. You can update app related settings from this page. You can go to this page by visiting Settings → Company Settings Page

From here you can change your business details like:

- Store/Shop Name, Phone, Email, Address etc.
- Store Logo
- Time & Date Format which will be visible in your data table
- Set your App Time zone
- Your Business Currency
- Primary Color - You can change your app colors for button, form items etc.

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Multi Store/Shops

If you have your business with more than one branch, then you can add it from Settings → Warehouses Page. It will generate a new store/shop with your desired settings.

- Newly created shop/store will use same **Brands** which already created in your app.
- Newly created shop/store will use same **Categories** which already created in your app.
- Newly created shop/store will use same **Product** which already created in your app. But it will use different sales, purchase, taxes, custom fields, wholesale price and taxes.

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Taxes

You can create taxes for your store from Settings → Taxes Page. It will required following fields to create new tax:

- **Name**: name of tax.
- **Tax Rate**: Rate in percentage for the tax.
- **Tax Type**: Single or Multiple type.

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Currencies

You can create many currencies for your store from Settings → Currencies Page according to your requirement. You can set default currency from company settings. It will required following fields to create new tax:

- **Currency Name:** name of currency.
- **Currency Symbol**: Symbol of currency.
- **Position**: Position of currency symbol. It will either be in front or behind after currency amount.
- **Currency Code**: Represent a specific currency as defined by the **ISO.**

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Payment Modes

Modes of your payments can be created from **Settings → Payment Modes**. **Cash Mode** will be available by default, and it cannot be deletable. Other created mode is considered online mode. Which will be used for calculating **Cash & Bank** amount.

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- **Payment Mode Name**: Mention the mode as UPI or Bank
- **Bank-Specific Fields** (visible when "Bank" is selected):
    - **Bank Name:**
    - **A/C Number**
    - **IFSC Code**
    - **Branch Name**
    - **Bank Address** (optional)
- **Initial Amount**: Starting balance of the bank amount should be defined.

Units

Units are the used for the measurement of product. You can create units from **Settings → Unit**. After creating units, you can assign them to products. Following fields is required to create units:

- **Unit Name**: name of unit
- **Short Name**: short representation of unit. It will be displayed after product quantity.

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Custom Fields

Custom fields are used when you want to create some extra fields for your product when creating sales and purchases. You can define default values for custom fields when you create products.

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Roles & Permissions

By using roles & permissions you can control your staff members. Permissions are predefined and you can create roles according to your requirement and assign permissions to that role. Each staff member must have a role. So that staff member access to that part of application which is assigned in his Role. To create a role following below steps:

- Go to **Settings → Roles & Permissions**
- Create New Role and assign permission
- You can create many roles according to your requirement using permissions for e.g. Stock Manager, Cashier, Employee etc.
- Admin Role is predefined and cannot be deleted.

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Email Settings

You can receive email for some activity like purchase, sales, expenses etc. To receive email first you have to setup email settings. Follow these steps to setup email settings :

- Select Mail Driver as SMTP
- From Name : name from which you want to receive email
- From Email : email from which you want to receive email
- Mail Queue : If it is selected yes it will send email in background.
- Host - host name
- Port - port number
- Encryption - it may be either tls or ssl
- Username - username of your email configuration
- Password - password of your email configuration

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SMS

SMS Credits

Can buy the SMS plan and view the credits used and remaining credits in this page.

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SMS Credits History

A record of all SMS credit transactions, showing usage and additions with the status.

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SMS Templates

Predefined message formats used to quickly send consistent and standardized SMS communications. Can enable and disable templates based on our usage.

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SMS Logs

Records of all sent SMS messages, including timestamps and delivery status. Can view the SMS Log details by clicking on the Actions icon.

SMS logs.png