StartERP
AI BUSINESS OS

MODULE GUIDE 1 OF 14

The basics every store has

The POS terminal, sales, returns, purchases and suppliers, products, customers and users that every store starts with. Step-by-step instructions for each of the 9 modules, with the real screens you will use.

Dashboard | POS terminal | Sales | Sales returns | Purchases, purchase returns & vendors | Products | Services | Customer management | User management

starterp.org
sirin@starterp.org · +966 50 197 1075

User guide · Edition November 2026

Contents

01 Dashboard
02 POS terminal
03 Sales
04 Sales returns
05 Purchases, purchase returns & vendors
06 Products
07 Services
08 Customer management
09 User management

How to use this guide

Each chapter covers one module: what it does, how to start in a few steps, and then each of its screens with the steps to follow. The label under each module name says whether every store has it or whether it is an add-on module switched on for your store.

Where to find what your store has. Open **Settings** → **Modules** to see the modules your store has. Every screen has a **?** button at the top with the steps for that screen, and the ⓘ beside a title explains what the screen shows.

About the screenshots. They come from StartERP demo stores (starterp.org/#/demo-store) for a Saudi trading business, so the names and figures are sample data. Your screens show your own company, products and figures, and some words change to suit your business.

The modules in this guide

Module	What it gives you
Dashboard Included	Today's sales, profit, VAT and stock at a glance
POS terminal Included	The terminal for your business category, online or offline
Sales Included	Invoices, payments and cash discounts
Sales returns Included	Credit notes with stock back on the shelf
Purchases, purchase returns & vendors Included	Supplier invoices, returns and supplier accounts that keep stock, cost and payables right

Products Included	Products, categories, stock and barcode labels
Services Add-on	Services priced by job, hour or package
Customer management Included	Customer accounts, credit limits and balances
User management Included	Users and the ready-made system roles

01

Dashboard

Included in every store

Know how the business is doing in ten seconds

Today's sales, profit, VAT due, cash in hand and low stock on one screen, updated the moment a sale is made, so you stop waiting for month-end reports to make decisions.

What you get

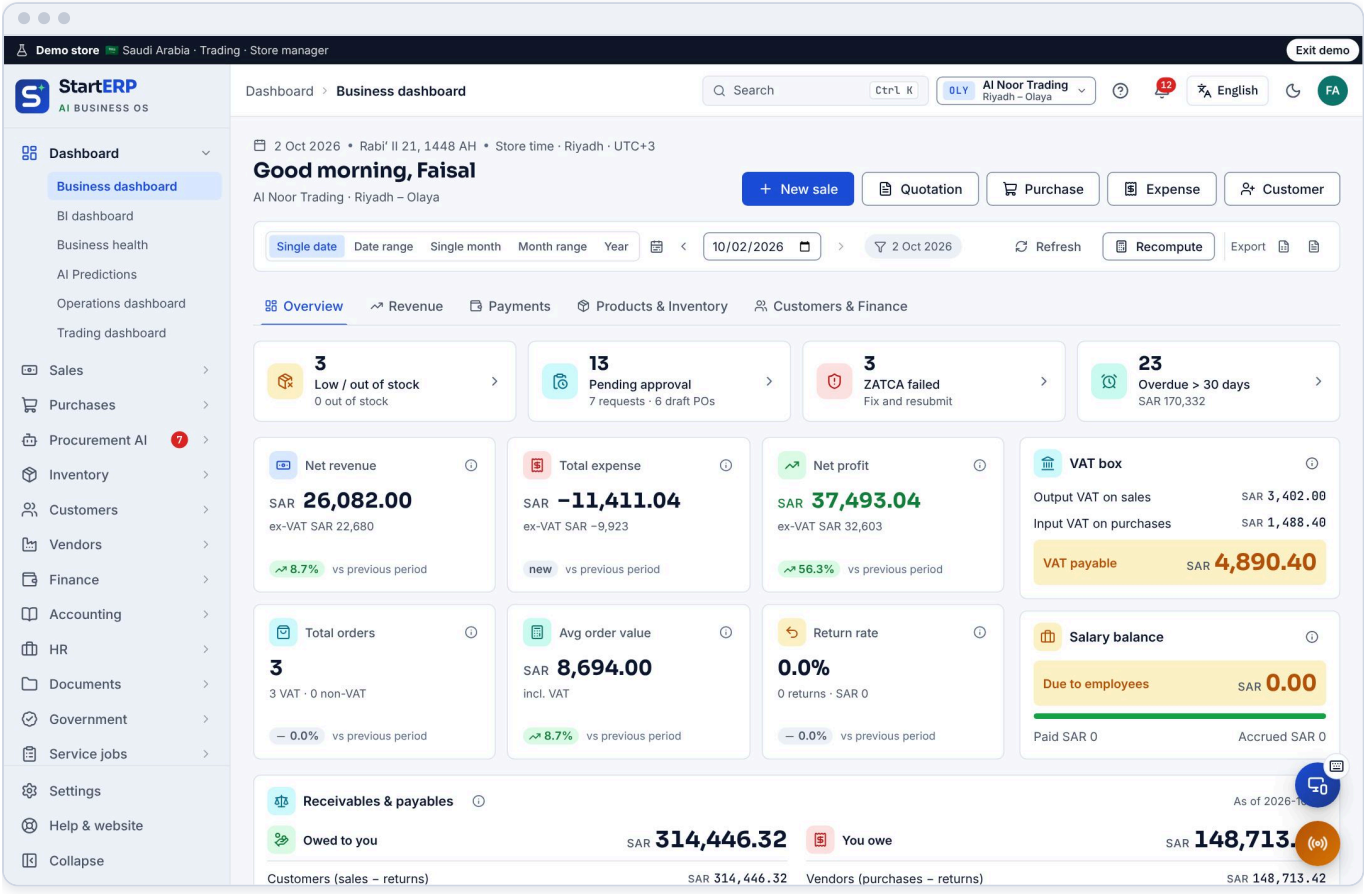
- Sales, profit and expenses for today, this month or any range
- The VAT box, the same figure you file with ZATCA
- Overdue customers and low-stock items flagged for action
- Live updates on every device, no refresh needed

GET STARTED IN 3 STEPS

1. **Make your first sale.** Sell at the POS or create an invoice; the dashboard counts it at once.
2. **Record an expense.** Add rent, salaries or bills so profit is real.
3. **Read your dashboard.** Pick today, this month or any range and check sales, profit and stock.

Business dashboard

Your store at a glance: revenue, expenses, profit, VAT, receivables and payables, stock health and quick actions, for any period you pick.



Business dashboard

1. Choose the period with the period picker: Single date, Date range, Single month, Month range or Year. Every figure and chart follows it.
2. The dashboard opens on today, in store time. Use the arrows beside the date to step a day back or forward and Today to come back; the period you pick is remembered, and a remembered today moves on with the calendar.
3. Read the KPI cards on the Overview tab (Net revenue, Total expense, profit, Total orders, Avg order value, Return rate); each shows the change vs previous period.
4. Click the ⓘ button on a card or box to open its breakdown table, then export it as CSV, Print / PDF or share it on WhatsApp.
5. Check the VAT box: Output VAT on sales minus Input VAT on purchases & expenses gives VAT payable (or VAT refundable) for the period.

6. Read the Receivables & payables card on the Overview tab, as of now: Owed to you is pending sales less pending sales returns and You owe is pending purchases less pending purchase returns plus the salaries owed to employees (each employee's ledger balance in their favour), with the net position. VAT is not part of this card; the VAT box shows it. Pending means not paid or paid partially, at the balance still due. Tap a line to see the documents behind it, and tap a document to open it.
7. Use the alert tiles (Low / out of stock, Pending approval, ZATCA failed, Overdue > 30 days) to jump straight to the filtered list.
8. Open the Revenue, Payments, Products & Inventory and Customers & Finance tabs for P&L, collections, Stock health, Outstanding receivables and the Balance sheet. A business that sells no goods sees a Services tab with its top services and no stock figures.
9. Use the quick actions at the top (New sale, Quotation, Purchase, Expense, Customer) to create a document without leaving the dashboard flow.
10. During the free trial the Get started card at the top lists the first steps: make your first sale at the POS (a jewellery shop sets today's gold rate first), check your products and prices, add your logo and invite your staff. Each Open button goes to the screen where it happens, a step ticks itself once it is done, and × hides the card.

Tips. Revenue and profit are shown ex-VAT; gross sales and the Last 12 months chart include VAT. The P&L trend chart shows, per day or month, the same figures as the cards: net revenue and total expense as bars and net profit (revenue minus total expense) as a line, ex-VAT, so its days add up to the cards. Cost of goods sold is not in it; gross profit after cost of goods is on the Revenue tab. Refresh reloads the figures; Recompute rebuilds the monthly totals from every invoice, return, purchase and expense — use it after importing or correcting old records. The VAT box only appears when the store has a VAT number and a VAT percent above zero (Store settings). The Salary balance box appears only when the HR module is turned on in Store settings → Settings. Cash and bank in the Balance sheet start from your Opening balances; enter them in Store settings so the sheet is correct. The period you choose is remembered on this device. Figures cover the current store only — switch store to see another branch. The Balance sheet and Cash & bank follow the period you pick: the sheet is as of the period's last day, and money in and out is the period's own. Signed in to your store, they add up every ledger posting from the store's first day.

02

POS terminal

Included in every store

A checkout built for your kind of business

Each business category gets its own terminal: tables and kitchen orders for restaurants, job cards for workshops, measurements for tailors, barcodes for supermarkets. It keeps selling when the internet drops and catches up when it is back.

What you get

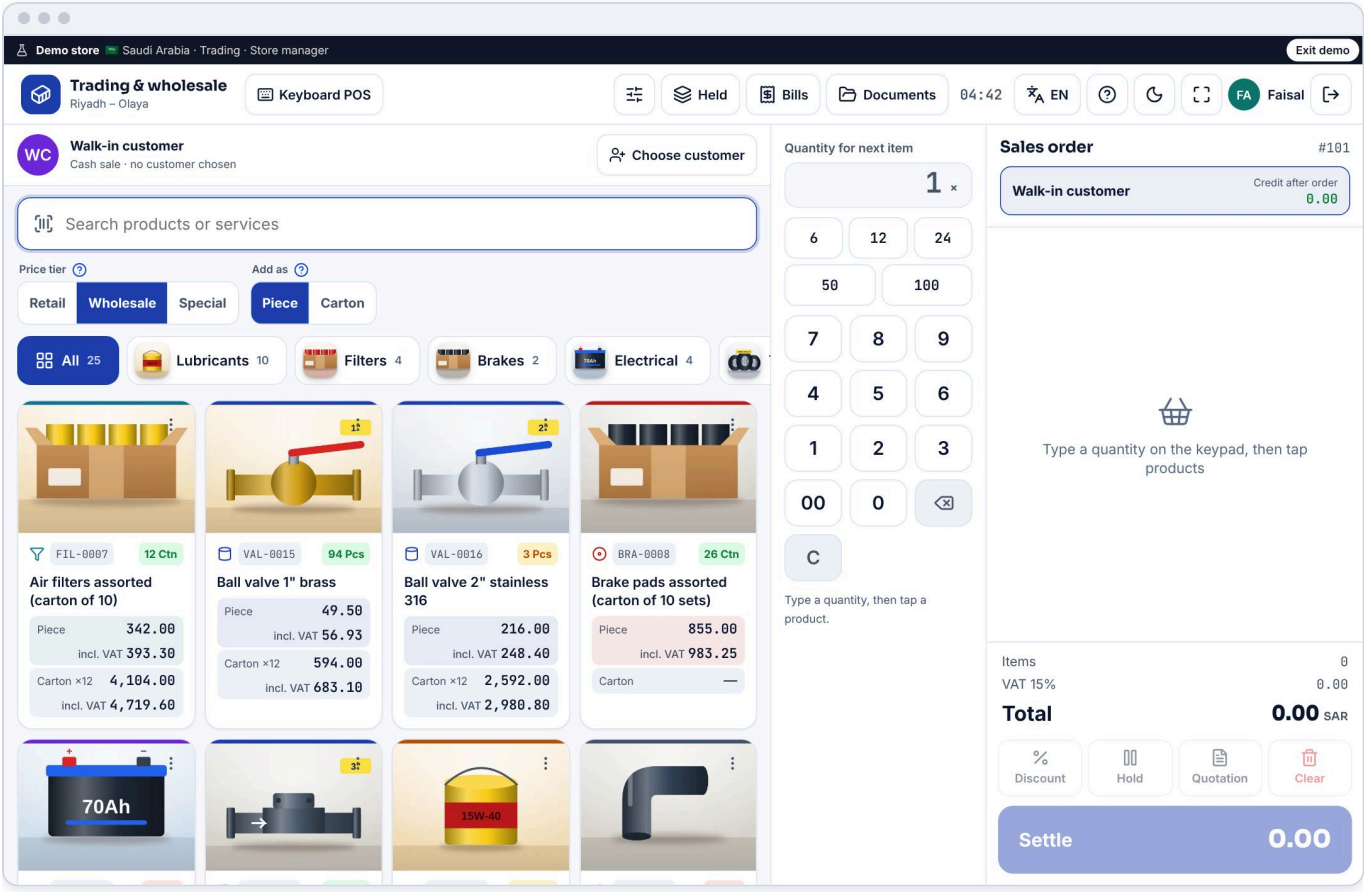
- ZATCA Phase 2 invoices reported from the counter
- Cash, card, bank transfer or on account, split as you like
- Prints on receipt printers or A4, or shares a PDF on WhatsApp
- Works offline and on any phone, tablet or computer

GET STARTED IN 3 STEPS

1. **Add your products.** Names, prices and barcodes, or import them from Excel.
2. **Set up your printer.** Choose receipt or A4 printing, or share receipts as PDF.
3. **Ring up the first sale.** Open the POS, tap or scan items and take the payment.

POS basics: selling at any terminal

Every terminal shares the same cart, payment screen and receipt. Learn them once and you can work any counter.



POS basics: selling at any terminal

1. Tap an item tile (or scan its barcode) to add it to the cart. Items with "Options" open a picker for size, add-ons and a note.
2. With a USB or Bluetooth barcode scanner, just scan: the item goes into the cart with no tap, even when the search box is not selected (after tapping a tile, a tab or the cart). Scan it again for one more. A short beep and a green search box mean it was added; a low buzz, a red box and “Barcode not found” mean no product has that barcode, code or part number. Scans are ignored while you type in another box (such as the amount on the payment screen) or while a window is open. Items this device has already shown are still found by barcode when the internet drops.
3. Type in the search box and the tiles show the matching items at once, with the words you typed marked. Enter adds an item whose barcode or code you typed; on a name the text stays and the tiles keep its matches, so you tap the one you want. A code that is not found buzzes and turns the box red.

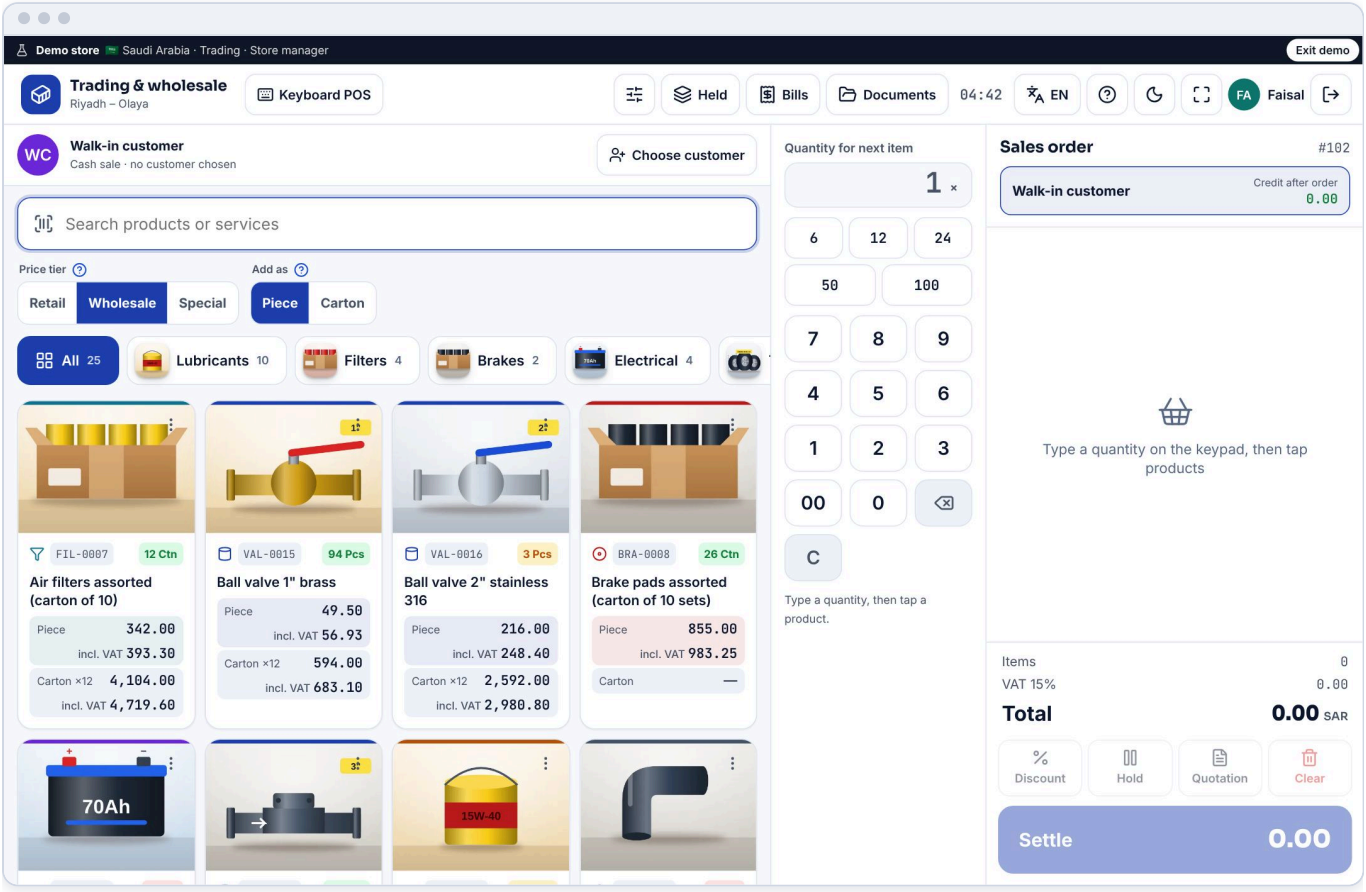
4. Too many filter rows above the items? Tap "Filters" (in the top bar on a wide screen, just above the items on tablets and phones, beside the search on the industrial counters): "Show filters" hides or shows every filter bar at once (category tabs, product types, and on the industrial counter the category, brand, type, size and material rows), and the ticks below hide or show each bar on its own. A hidden bar stops filtering, so the grid goes back to all items (or the "All" tab) and search still finds everything. The choice is kept on this device for you and this terminal; the number on the button says how many bars are hidden.
5. No keyboard pops up on your touch screen? Tap the keyboard button in the search box: a keyboard opens at the bottom of the item area with English and Arabic letters (Malayalam too on Indian terminals), "123" for numbers and signs, Space, ⌫ (hold to keep deleting), "Clear", the Enter key and ⌄ to close it. It types into the search like any keyboard, and the cart and "Pay" stay in view. The button shows by itself on touch screens; to show or hide it on this terminal, open the language menu in the top bar and tap "On-screen keyboard". The choice is kept on this device.
6. Tap a cart line to change it. The editor names the line ("Editing line 1 of 2") and shows its unit price "excl. VAT" and "incl. VAT"; pick "Quantity", "Price excl. VAT" or "Price incl. VAT". The box shows the current value: type a new one to replace it, or use ⌫ / C to edit or clear it, on the keypad or keyboard; the other price (with or without VAT) and the new "Line total" show below as you type. Tap "Apply qty" / "Apply price" or press Enter. − / + step the quantity, × or Esc closes without changing, and the bin removes the line. The ↑ and ↓ buttons beside it move the line up or down the cart; the receipt and the invoice keep that order.
7. Every terminal opens on the "Walk-in customer", so you can tap items right away; an empty customer field is always a walk-in sale. To bill someone else tap "Walk-in customer" to search by mobile, name or VAT number, or add a "New customer"; the × beside a chosen customer puts the bill back on walk-in. On the trading and industrial counters tap "Choose customer" (the button "Change" once one is picked). An on-account or part-paid sale, a quotation and a B2B tax invoice with the buyer's VAT number still need a named customer, and so do tailoring orders and salon packages kept on the client's card.
8. Tap "Discount" and choose % or an amount, pick a preset or type a value, then "Apply". A discount can never exceed the cart total.
9. Tap "Hold" to park the sale and serve the next customer; open "Held" in the top bar and tap "Resume" to bring it back.
10. Tap "Pay" and choose the method. For cash the "Amount tendered" starts at the total: tap a preset note or type what the customer hands over and the "Change due" shows at once. For Mada, Visa, Apple Pay and other cards tap "Record … payment": with a connected card machine the amount is sent to it, the customer taps the card and the approval number is recorded by itself; otherwise type the approval number from the machine.

11. Partly paid? Type the amount paid now: the rest goes on the chosen customer's account ("Partly paid · balance … on the account"); without a customer the till asks you to choose one. To split, tap "Add payment" for each part (for example part cash, part Mada). "On account" leaves the whole amount on the customer's account and shows the credit limit.
12. In a Saudi store in ZATCA Phase 2, "Report to ZATCA" on the payment screen (and on deposit screens) is on for every sale: the invoice is reported to ZATCA (cleared for a B2B customer with a VAT number) as soon as it is saved, and the receipt prints with ZATCA's QR code once ZATCA has answered. Switch it off to save the sale without reporting: the receipt then prints the ZATCA Phase 1 QR code.
13. The bottom of the payment screen shows the default print format (80 mm receipt, A4 or A5 invoice, or dot-matrix page); the settings icon next to it opens the Print Center for the paper, template, printer, copies and language over a preview of this bill. Then tap "Save & print": the sale is saved and this device's print dialog opens with it straight away, with no preview first. "Save" only saves. Either way the next sale starts at once; the bar at the bottom shows the saved invoice, the change to give, any unpaid balance and ZATCA's answer, with "Details" for the preview, "Print" (any format, or the Print Center), "PDF" and the WhatsApp icon ("WhatsApp receipt" on Indian terminals); a past sale is printed again from "Bills".
14. In the StartERP desktop app the printer button next to it lists the printers of this device ("No printer connected" when there are none). The PDF icon saves the sale and downloads its invoice PDF.
15. To change the default receipt, pick another format in "Default print format" at the bottom of the payment screen: it is saved at once (store administrators: for this terminal on every device; managers: for their own till). Or tap the settings icon next to it (or "Print Center" in "Details" on the last sale), pick the paper, template, printer, copies and language and tap "Save as default". Every next sale prints that way.

Tips. Terminals that sell services (workshop, car wash, salon, barber, tailors, clinics, agencies and other service trades) have small “Service” and “Product” buttons in the top bar (“New service” only where the business sells no goods): they open the service or product form over the terminal, with the fields your business category uses, and “Add to ticket” puts the saved item on the open sale. To change an item on the ticket, tap its line, then “Item” → “Edit service” (or “Edit product”). Only users whose role may create or edit products see these. While the terminal has no products of its own, “Starter list” in the top bar adds the starter items. Item tiles show a picture of the product: starter products come with a ready-made one, and any product can have its own (edit the product → “POS picture”). Pictures load as you scroll; a product with no picture shows its icon. The WhatsApp icon opens "Send WhatsApp message" with the PDF's link in the message and the customer's number (change it if you like, with the country code, e.g. 9665xxxxxxxx). "Open in WhatsApp" opens your WhatsApp app (phone or desktop) with that message. When Store settings → WhatsApp is connected, "Send PDF" sends the PDF itself from your WhatsApp Business number with the Invoice share template approved for your store under Store settings → WhatsApp → Message templates (invoice_pdf unless you pick another); it is never asked when sharing. In ZATCA Phase 2 stores the PDF of a reported invoice has its signed XML inside (PDF/A-3) and a "Zatca signed xml" link to it. Typing a price "incl. VAT" on a terminal whose prices are excl. VAT (or the other way round) keeps the price you typed exactly: the other price is worked out at the VAT rate and the invoice carries the price excl. VAT. Terminals with prices excl. VAT also show each item's price "incl. VAT" on its tile and cart line. Saudi terminals save each sale in Sales as a simplified tax invoice (a standard B2B invoice when the customer has a VAT number) and reduce stock in the main warehouse. Use "Open invoice in ERP" to see it. The bar after the sale (and "Details") says whether ZATCA accepted it; a sale ZATCA rejected, one saved without reporting, or one made while ZATCA was not connected can be reported later with "Report to ZATCA now" in Sales / Orders. While the card machine works the till shows "Waiting for the card…". "Cancel payment" stops it on the machine, "Send again" retries a declined card and "Record by hand" lets you type the approval number instead. With several machines the cashier picks one; the till remembers it. Tabby and Tamara appear only on terminals that offer them: tap "Send payment link" and wait for approval. Indian terminals bill in ₹ with CGST + SGST (IGST for another state), take UPI by QR ("Show UPI QR") and "Credit (udhaar)"; bills are kept in this terminal's "Bills" book, not in the Saudi ERP. A small "?" next to a trade word (MTC 3.1, Making charge, IMEI, KOT, Retention …) explains it in plain words: tap it, then tap anywhere else to close. On a phone, the cart is hidden: tap the floating cart button with the total to open it. The top bar has "Held", "Documents" (quotations, proformas and purchases), the language switch, help, theme (light / dark), "Full screen" and "Back to ERP". Held orders and table maps are kept in this browser; finish or clear them before switching devices. Set the receipt printer size once in printing settings. The quick print format (the default receipt) comes from Store settings → POS terminal → Printing. The store administrator can change it right in the terminal with "Default print format" at the bottom of the payment screen, "Print Center" → "Save as default" or "Print as…" → "Change quick print format…": it is saved for that terminal on every device. A manager's change applies to their own till (this device). The Print button and the preview switch to it at once.

Choosing a POS terminal

Pick the touch-screen terminal that matches your business. Saudi terminals save every sale as a ZATCA tax invoice in StartERP; Indian terminals bill in rupees with GST, UPI and udhaar.



Choosing a POS terminal

1. Choose the market at the top: "All markets", "Saudi Arabia" or "India". The number shows how many terminals each has.
2. Tap a sector to narrow the list: Retail, Food & drink, Fashion & tailoring, Beauty & grooming, Automotive, B2B, projects & services, or Hospitality & leisure.
3. Or type in "Find a business type" to search by name or description in English or Arabic.
4. Check the badge on each card: "KSA · SAR" or "India · ₹", and the feature tags under the description.
5. Tap a card to open that terminal in full screen.
6. Use "Back to ERP" to return to the dashboard, or the language button to switch English / Arabic.

Tips. Your market and sector choice is remembered on this device. From any screen in the app, tap the round POS terminal button in the bottom corner (just above the StartAI button) to open this list. Tap its "–" badge to tuck it into a small tab on the screen's edge, and tap the tab to bring it back; the choice is kept on this device. The button shows only to users who may open the POS terminal. Inside any terminal, tap its name in the top-left corner to come back to this list. Bookmark a terminal (for example /pos/grocery) on the cashier tablet so it opens directly.

03

Sales

Included in every store

Invoice faster and get paid on time

Create tax invoices in seconds, record full or part payments and see at a glance who still owes you. Every invoice is ZATCA compliant and numbered without gaps.

What you get

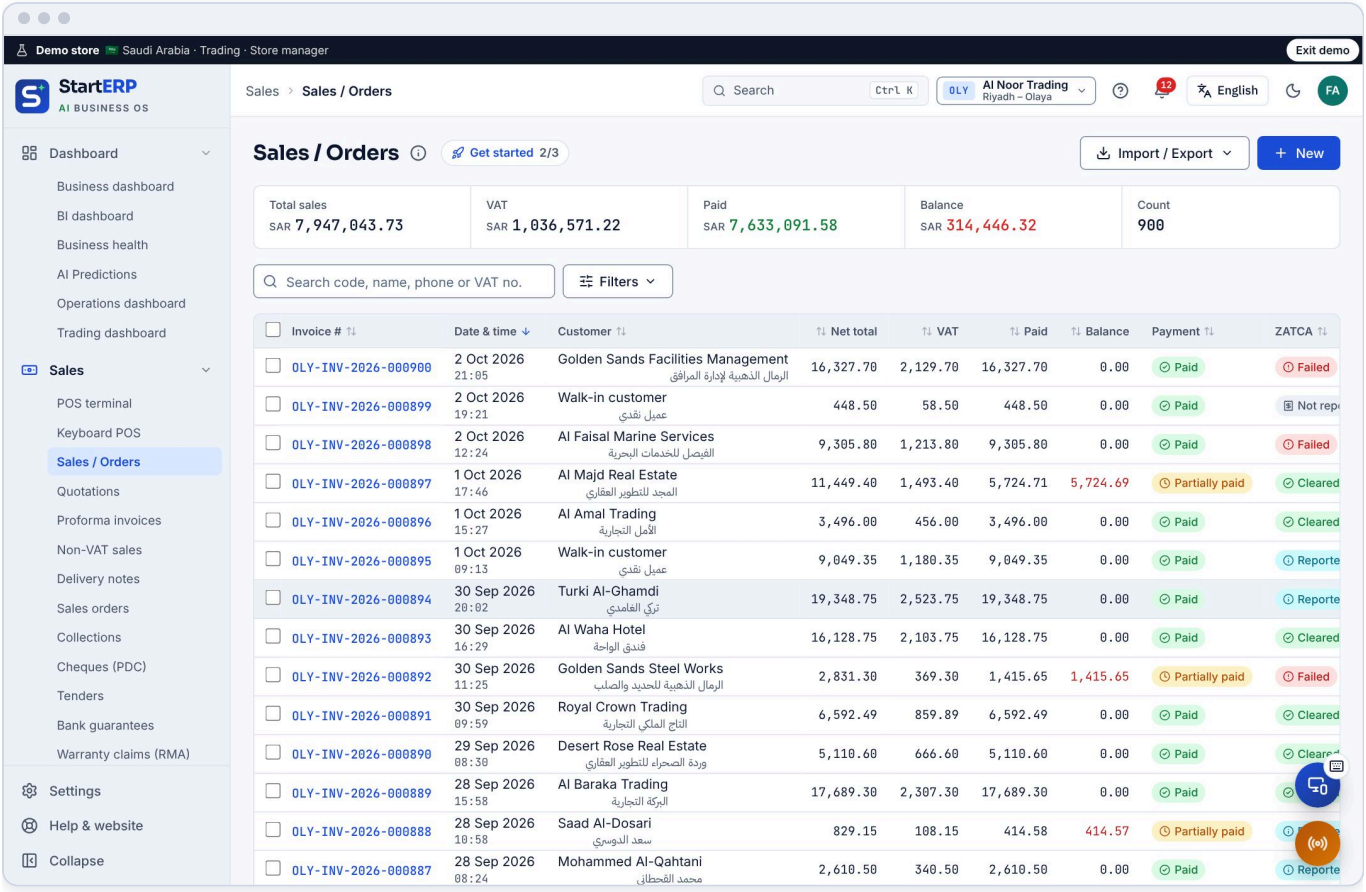
- Tax invoices with QR code and Arabic and English layout
- Part payments, cash discounts and payment history per invoice
- Lists with totals, filters and export to Excel or PDF
- Discount limits per role so nobody gives away your margin

GET STARTED IN 3 STEPS

1. **Add a customer.** Name, phone and tax number if they have one.
2. **Create an invoice.** Pick the customer and items; tax is worked out for you.
3. **Record the payment.** Full or part payment, cash, card or transfer.

Sales invoices

Issue tax invoices and simplified invoices, take payments and deduct stock. Every VAT invoice can be reported to ZATCA.



Sales invoices

ON THE LIST

1. Type in the search box to find by code, customer name, phone or VAT no.
2. Pick a date range (All time, Today, Last 7 days, This month… or Custom range) and use the filter menus; “Clear” resets them.
3. Filter by Customer, Payment status, ZATCA, Created by or Payment method.
4. Click a row to open it. The row icons are View, Edit, Print and WhatsApp; right-click a row for View and Edit.
5. Tick rows for bulk actions: Print selected, Export selected or Report to ZATCA.
6. Use Export → Excel (.xlsx), CSV (UTF-8), PDF (list report) or JSON to take the filtered list out, with the store's details, the filters and a totals row.
7. Tick “Show deleted” to see documents deleted before deleting was switched off; right-click one and choose Restore.
8. Click “New” to create an invoice.

Tips. With “Custom payment account” on in Settings, a cash or bank payment can go to any account you pick (search, filter by type, or open a new one) instead of Cash or Bank. Leave it on the default to keep using Cash or Bank. The totals bar at the top always reflects the current search, filters and date range. The ZATCA column shows Not reported, ZATCA reporting in progress, Reported, Cleared or Failed. Bulk “Report to ZATCA” skips invoices already reported or still being reported and needs Phase 2 connected for the branch. Balance in red means money still owed; filter Payment status = Not paid or Partially paid to chase it. Sales invoices cannot be deleted. To cancel or correct one, issue a return (credit note) for it. Your date range, tab, sort and page size are remembered for next time. “Auto-refresh” reloads the list every 30 seconds.

ON THE FORM

1. Choose the Customer (search name, phone, code or VAT no.); with none picked the sale goes to an unknown customer (simplified invoice). Phone, VAT no. and address come from the customer record. “New”, “Edit” and “List” open in a window, so the form stays open.
2. Check Date & time. Phone, VAT No. and Address come from the customer record and show under the customer.
3. Add items: search a product by name, part no. or barcode and press Enter, or click “Scan barcode”. Picking the same product again adds 1 to its quantity. Not in the list yet? “New product / service” opens the product or service form in a window; save it and it is added as a line (shown to users who may create products).
4. Or copy lines from another document with “Import products” (delivery notes, quotations, purchase orders or purchases).
5. On each line set Qty, Warehouse, U.Price (ex. or inc. VAT) and a discount (U.Disc or U.Disc %). The gear icon shows or hides columns. The pencil next to a product’s name opens its full product form in a window: save it and the line takes the new name, part no. and unit, keeping the qty and price you typed.
6. In “Bill summary” add a Discount (amount or %, ex. or inc. VAT), Shipping / handling, check VAT % and Rounding (tick Auto to round to the nearest 0.05).
7. “Payments received” starts with one payment for the net total: pick its method (Cash, Mada, card, transfer or cheque). Lower the amount for a partial payment, remove the row for a credit sale, or use “Add payment row” to split it; add a reference if needed.
8. Saudi stores in ZATCA Phase 2: leave “Invoice type for ZATCA” on Auto, or pick B2C (always simplified) or B2B (always a standard tax invoice, sent for clearance). With B2B the form lists what ZATCA needs from the buyer and won't save until every line is ticked.
9. Keep “Report to ZATCA” ticked and press Create or Ctrl+S.

Tips. The date cannot be in the future: it says when the sale, purchase, payment or entry happened, so the picker stops at now in your store's time (a few minutes of leeway for a device clock that runs fast). Due dates, valid-until, expected delivery and bookings can still be later. No customer is needed: an empty customer saves as an unknown customer. Saving is blocked by: “Add at least one item”, “Every quantity must be greater than 0”, “A line discount is larger than its unit price” and “Discount cannot exceed the subtotal”. “Payments (…) exceed the net total (…)” — payments plus cash discount cannot be more than the invoice. Leave payments short for a credit sale: the balance stays on the customer’s account (Partially paid / Not paid). Editing a saved invoice or return: when you change its items or amounts, its payments adjust by themselves. One that was paid in full stays paid in full (the last payment takes the new total); a part payment is only lowered, last payment first, when the new total is smaller, and never raised above what was saved. A payment amount you type yourself is left as you typed it. The “lines exceed available stock” and “Credit limit exceeded” warnings do not block saving — check before you confirm. Once an invoice is reported to ZATCA (or while it is being reported), its date, customer, lines, discount, shipping and totals are read-only; payments, the cash discount and remarks can still change. Correct it with a sales return or a credit/debit note. Unsaved work is kept as a draft every 30 seconds; when you come back choose “Restore” or “Discard” on the banner.

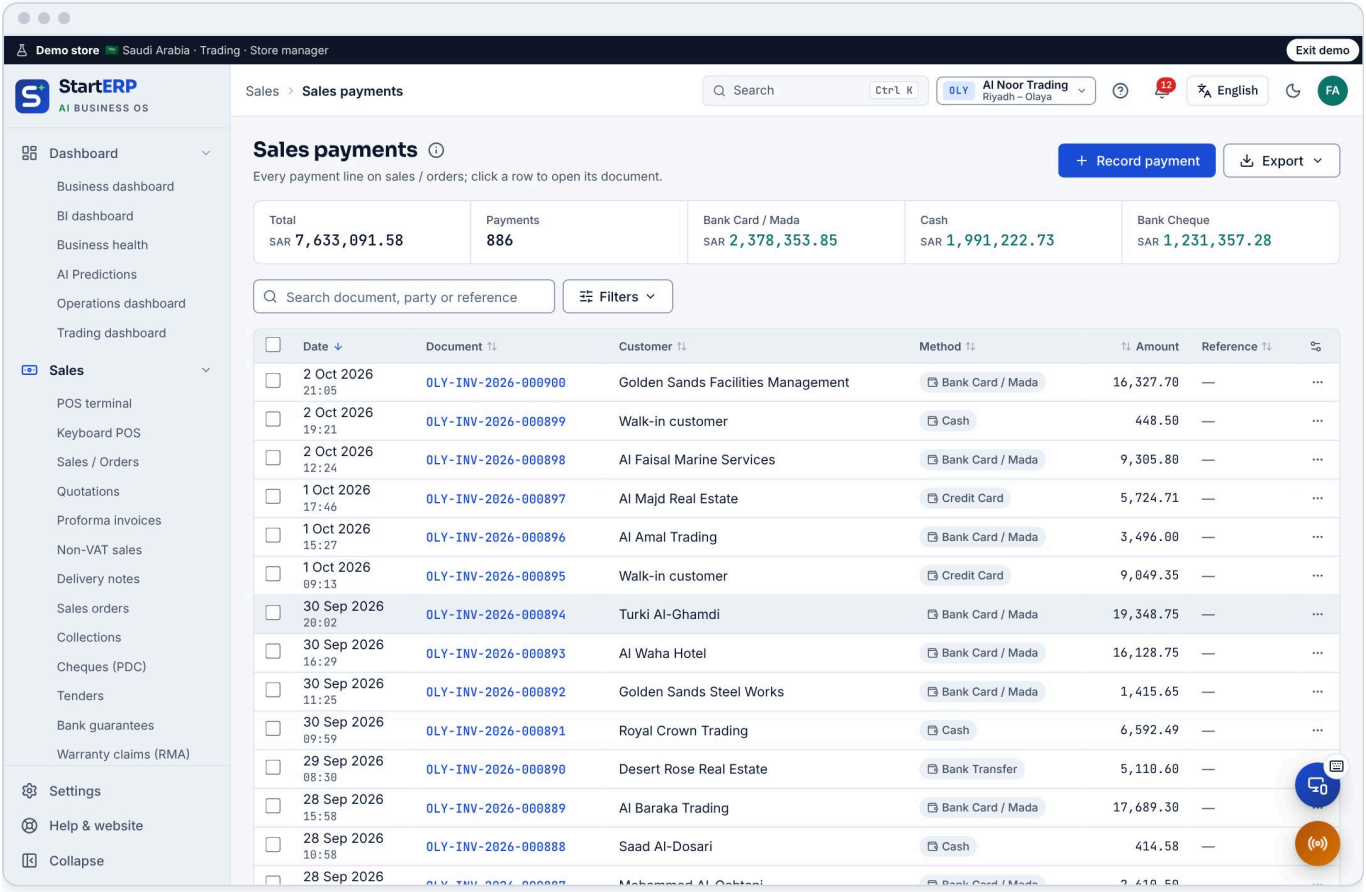
ON THE RECORD

1. Check the badges (payment status, ZATCA status) and the Customer, Document, ZATCA e-invoice and Totals cards.
2. Click “Print Invoice” to open the Print Center; “Thermal Receipt” prints on the 80 mm roll.
3. If it is not reported yet, click “ZATCA Report” (or “Report to ZATCA now” in the ZATCA card).
4. Send it with WhatsApp or Email.
5. Use “Create return” for a credit note or “Create delivery note” to dispatch the goods — both open pre-filled.
6. Open the Payments tab to see what was received; to add a payment click Edit (or use Sales payments → Record payment).
7. Sales invoices cannot be deleted. To cancel or correct one, issue a return (credit note) for it.

Tips. If ZATCA rejected the invoice a red banner shows the error (for example BR-KSA-44, buyer VAT not 15 digits starting and ending with 3): click “Edit buyer details”, fix it, then “Retry”. The “Related” row links returns and delivery notes made from this invoice; Quotation / Proforma rows show where it came from. Gross profit and the Profit column show only to users allowed to see cost. Only the first five actions show as buttons; the rest are under the “…” More actions menu. The History tab shows who created and changed the document, with old → new values.

Sales payments

Every payment received on sales invoices in one list, with a quick way to record a new one against any unpaid invoice.



Sales payments

1. Search by document, customer or reference, pick a date range and filter by Method.
2. Read the totals bar: Total, number of Payments and the top payment methods.
3. Click a row to open its invoice.
4. To collect money click “Record payment”, choose the Document (only invoices with a balance are listed), check Amount, Method, Date and Reference, then “Save payment”.
5. Use Export for a PDF report or CSV.

Tips. The date cannot be in the future: it says when the sale, purchase, payment or entry happened, so the picker stops at now in your store's time (a few minutes of leeway for a device clock that runs fast). Due dates, valid-until, expected delivery and bookings can still be later. With “Custom payment account” on in Settings, a cash or bank payment can go to any account you pick (search, filter by type, or open a new one) instead of Cash or Bank. Leave it on the default to keep using Cash or Bank. The amount defaults to the invoice balance and cannot exceed it (“Cannot exceed the balance”). Enter less for a partial payment. The payment is added to the invoice, so its status updates to Partially paid or Paid. “Undo” in the notification removes it. To correct or delete a payment, open the invoice and edit its “Payments received” rows.

04

Sales returns

Included in every store

Returns handled cleanly, stock and books included

Return all or part of an invoice in a few taps. Stock goes back on the shelf, the customer's balance and your VAT are corrected, and the credit note is reported to ZATCA.

What you get

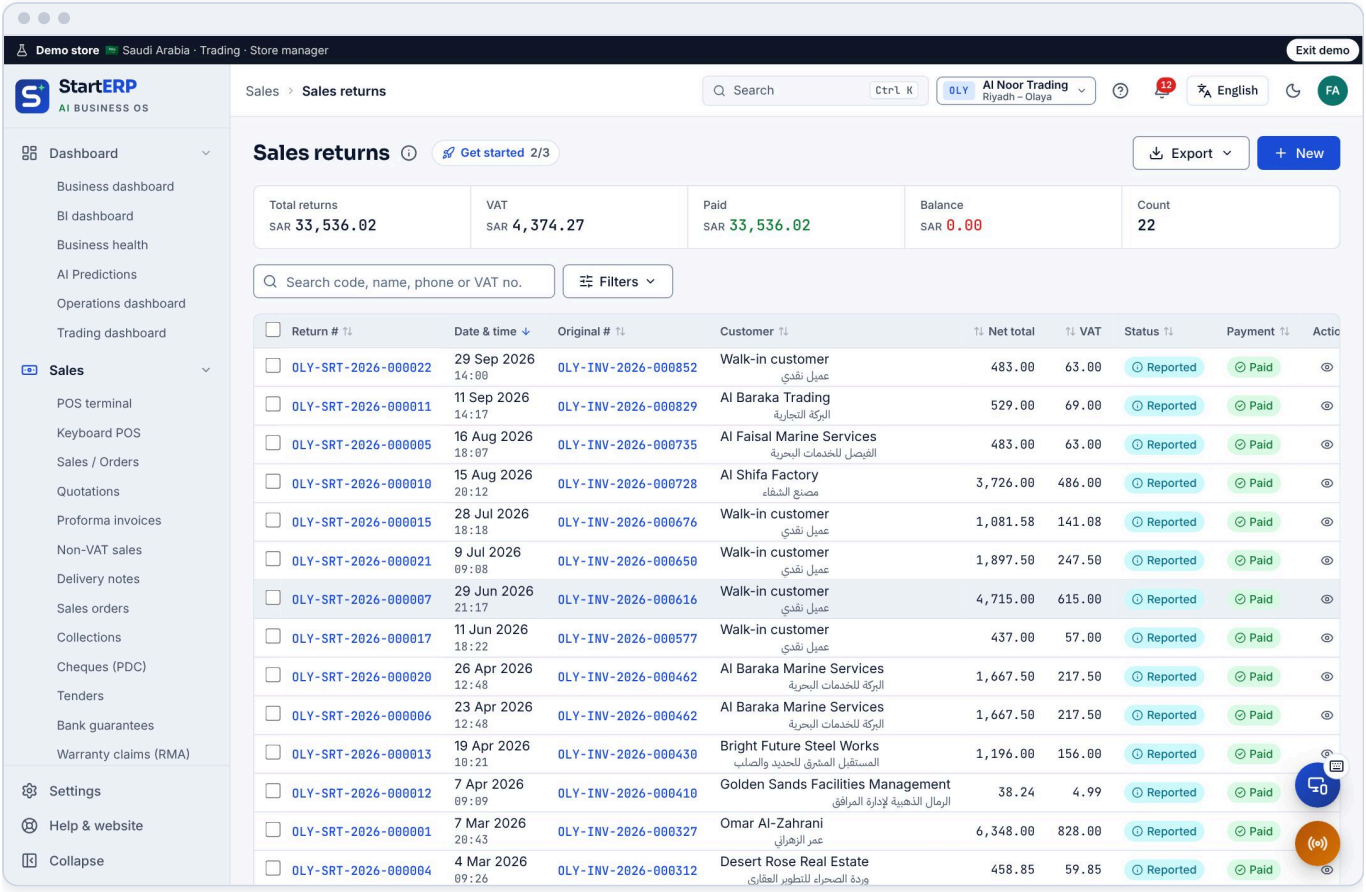
- Returns linked to the original invoice, never over-returned
- Refund in cash or to the customer's account
- Stock and cost updated automatically
- ZATCA-reported credit notes

GET STARTED IN 3 STEPS

1. **Find the invoice.** Open the sale the customer is returning.
2. **Create the return.** Pick the lines and quantities coming back.
3. **Refund the customer.** Cash, card or credit to their account.

Sales returns (credit notes)

Return goods from a sales invoice: stock comes back, the customer is refunded or credited, and the credit note is reported to ZATCA.



Sales returns (credit notes)

ON THE LIST

1. Type in the search box to find by code, customer name, phone or VAT no.
2. Pick a date range (All time, Today, Last 7 days, This month… or Custom range) and use the filter menus; “Clear” resets them.
3. Filter by Customer, Payment status, ZATCA or Created by. The Original # column opens the invoice that was returned.
4. Click a row to open it. The row icons are View, Edit, Print and WhatsApp; right-click a row for View and Edit.
5. Tick rows for Print selected, Export selected or Report to ZATCA.
6. Use Export → Excel (.xlsx), CSV (UTF-8), PDF (list report) or JSON to take the filtered list out, with the store's details, the filters and a totals row.
7. Tick “Show deleted” to see documents deleted before deleting was switched off; right-click one and choose Restore.

Tips. With “Custom payment account” on in Settings, a cash or bank payment can go to any account you pick (search, filter by type, or open a new one) instead of Cash or Bank. Leave it on the default to keep using Cash or Bank. The Status column is the credit note’s ZATCA status; bulk reporting skips those already reported. Returns cannot be deleted. To undo a return made by mistake, issue a new sale for the returned items. The totals bar at the top always reflects the current search, filters and date range.

ON THE FORM

1. Choose the “Original invoice” (search by code or customer). Its customer and lines load automatically. Faster: open the invoice and click “Create return”.
2. Tick the Return box on each line being returned.
3. Adjust Qty — it cannot exceed the Returnable column.
4. Check the price, warehouse and Bill summary (discount, rounding).
5. In “Refund payments” click “Refund in full” or add rows for what you pay back.
6. Saudi stores in ZATCA Phase 2: leave “Invoice type for ZATCA” on Auto, or pick B2C (always simplified) or B2B (always a standard tax invoice, sent for clearance). With B2B the form lists what ZATCA needs from the buyer and won't save until every line is ticked.
7. Keep “Report credit note to ZATCA” ticked and press Create or Ctrl+S.

Tips. The date cannot be in the future: it says when the sale, purchase, payment or entry happened, so the picker stops at now in your store's time (a few minutes of leeway for a device clock that runs fast). Due dates, valid-until, expected delivery and bookings can still be later. Once a return is reported to ZATCA (or while it is being reported), its date, customer, lines and totals are read-only; refunds, the cash discount and remarks can still change. Correct it with a credit or debit note. Returnable = quantity sold minus earlier returns of the same item from the same warehouse, so an invoice can never be returned twice. Saving is blocked by “Choose the original document”, “Tick at least one item to return” and “Return quantity cannot exceed the returnable quantity”. Returned quantities are added back to the stock of the line’s warehouse when you save. The VAT % comes from the original invoice. Refunds plus cash discount cannot exceed the return total. Any amount not refunded remains as the return’s balance.

ON THE RECORD

1. Check the Original document link, the ZATCA e-invoice card (Credit note (381)) and Totals.
2. Click “Print” or “Thermal Receipt” to give the customer the credit note.
3. If not reported, click “ZATCA Report”; if it failed, fix and “Retry”.
4. Open the Refunds tab to see refund payments; use Edit to add more.
5. Returns cannot be deleted. To undo a return made by mistake, issue a new sale for the returned items.

Tips. A credit note is the ZATCA-approved way to correct or cancel a reported invoice — do not edit the invoice itself. Only the first five actions show as buttons; the rest are under the "…" More actions menu. The History tab shows who created and changed the document, with old → new values.

05

Purchases, purchase returns & vendors

Included in every store

Buy right, return easily and know what you owe each supplier

Record supplier invoices once and StartERP updates stock, average cost and what you owe each supplier. Return damaged or excess stock against the original purchase, and keep every supplier's details, VAT number, balance and statement in one place.

What you get

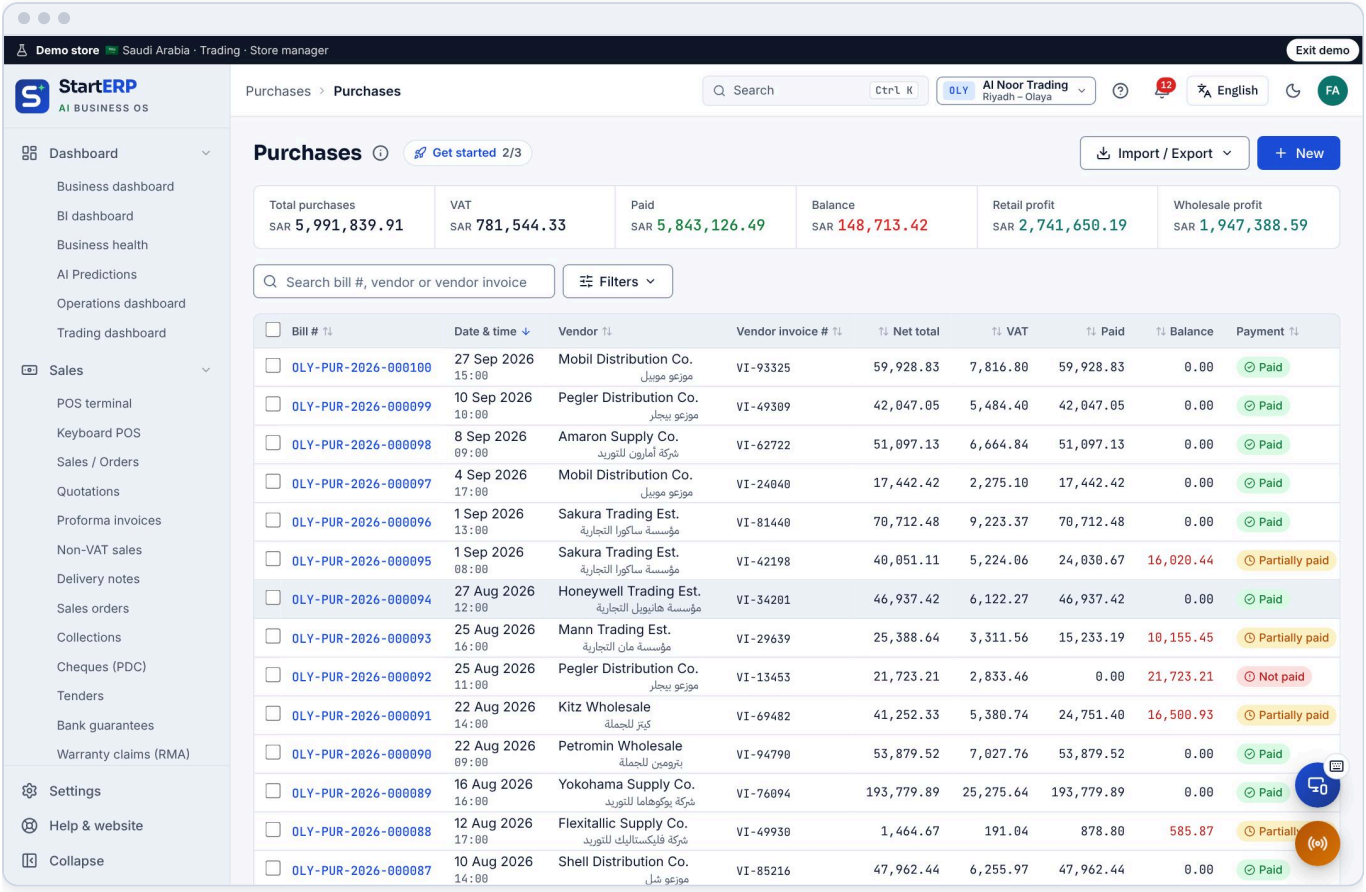
- Stock and average cost updated on save
- Purchase returns linked to the original purchase
- Supplier statements, balances and payables
- Input VAT ready for your VAT return

GET STARTED IN 3 STEPS

1. **Add a supplier.** Name, tax number and contact.
2. **Record a purchase.** Enter the supplier invoice; stock and cost update.
3. **Pay the supplier.** Record what you paid and see what is still owed.

Purchases

Record vendor bills for goods you buy. Saving a purchase adds the stock to the chosen warehouses and updates each product's purchase, retail and wholesale prices.



Purchases

ON THE LIST

1. Search by bill #, vendor name or vendor invoice # in the search box.
2. Pick a period from the date range menu (All time, Today, Last 7 days, This month… or Custom range with From / To).
3. Filter by Vendor, Payment status, Created by or Payment method; Clear resets all filters.
4. Check the totals above the table: Total purchases, VAT, Paid, Balance, Retail profit and Wholesale profit.
5. Use the row icons to View, Edit, Print or send the bill on WhatsApp.
6. Tick rows to show the bulk bar: Print selected, Export selected (Excel or CSV) or Delete selected.
7. Click Export and choose Excel (.xlsx), CSV (UTF-8), PDF (list report) or JSON; the export follows the current search, filters and date range.
8. Click New to record a new purchase.

Tips. With “Custom payment account” on in Settings, a cash or bank payment can go to any account you pick (search, filter by type, or open a new one) instead of Cash or Bank. Leave it on the default to keep using Cash or Bank. Retail profit and Wholesale profit are the expected profit if the purchased quantities sell at the prices set on each line. A red Balance means the bill is not fully paid; filter Payment status = Not paid to see what you owe vendors. Deleting a purchase removes its stock from the warehouses again; restoring it puts the stock back. Deleted records are hidden, not lost: tick Show deleted, then use Restore from the row menu. Each delete toast also has Undo. The list remembers your date range, tab, sort and page size. Tick Auto-refresh to reload every 30 seconds.

ON THE FORM

1. Choose the Vendor — search by name, phone, code or VAT no. Phone, VAT No. and Address come from the vendor record; New, Edit and List open in a window. With no vendor it saves as an unknown vendor.
2. Type the Vendor invoice no. from the paper bill and check Date & time.
3. Add products: search by name, part no. or barcode and press Enter, or use Scan barcode; “New product” creates a product in a window and adds it as a line. To copy lines, use Import products (purchase orders, earlier purchases, or an image).
4. On each line set Qty, Warehouse and the buying price in U.Price (ex. VAT) or U.Price (inc. VAT), plus any unit discount.
5. Selling prices are not typed on the bill: turn on auto-update with a retail / wholesale margin % in the product form and each new purchase re-prices the product from its new buying price; otherwise the product keeps its prices.
6. In Bill summary add any Discount, Shipping / handling and Rounding, and check VAT % and NET TOTAL.
7. Payments paid starts with one payment for the net total: pick its method, lower the amount for a partial payment, or use Add payment row to split it. Remove the row to keep the amount on the vendor balance.
8. Click Create (or Update when editing). The stock is received and the product prices are updated.

Tips. The date cannot be in the future: it says when the sale, purchase, payment or entry happened, so the picker stops at now in your store's time (a few minutes of leeway for a device clock that runs fast). Due dates, valid-until, expected delivery and bookings can still be later. Saving updates the product master: purchase price = unit price − unit discount, the new retail and wholesale prices and their margins, and a price-history entry. Import products → From purchase orders only copies the lines. To mark the purchase order as Received and link it, open the PO and use Convert to Purchase instead. Import products → From an image or PDF reads a photo or PDF of the vendor bill (simulated AI): check each line's Confidence, then Apply to form — it sets the vendor and invoice no. and appends the lines. Save is blocked with a message when: no items, a quantity is 0, a line discount is larger than its unit price, a price is negative, or payments exceed the net total. The Commission & cash discount card records a commission paid and a cash discount that reduces the balance, not the invoice total. Unsaved work is kept as a draft every 30 seconds; if you come back, choose Restore or Discard on the "Restore draft?" banner.

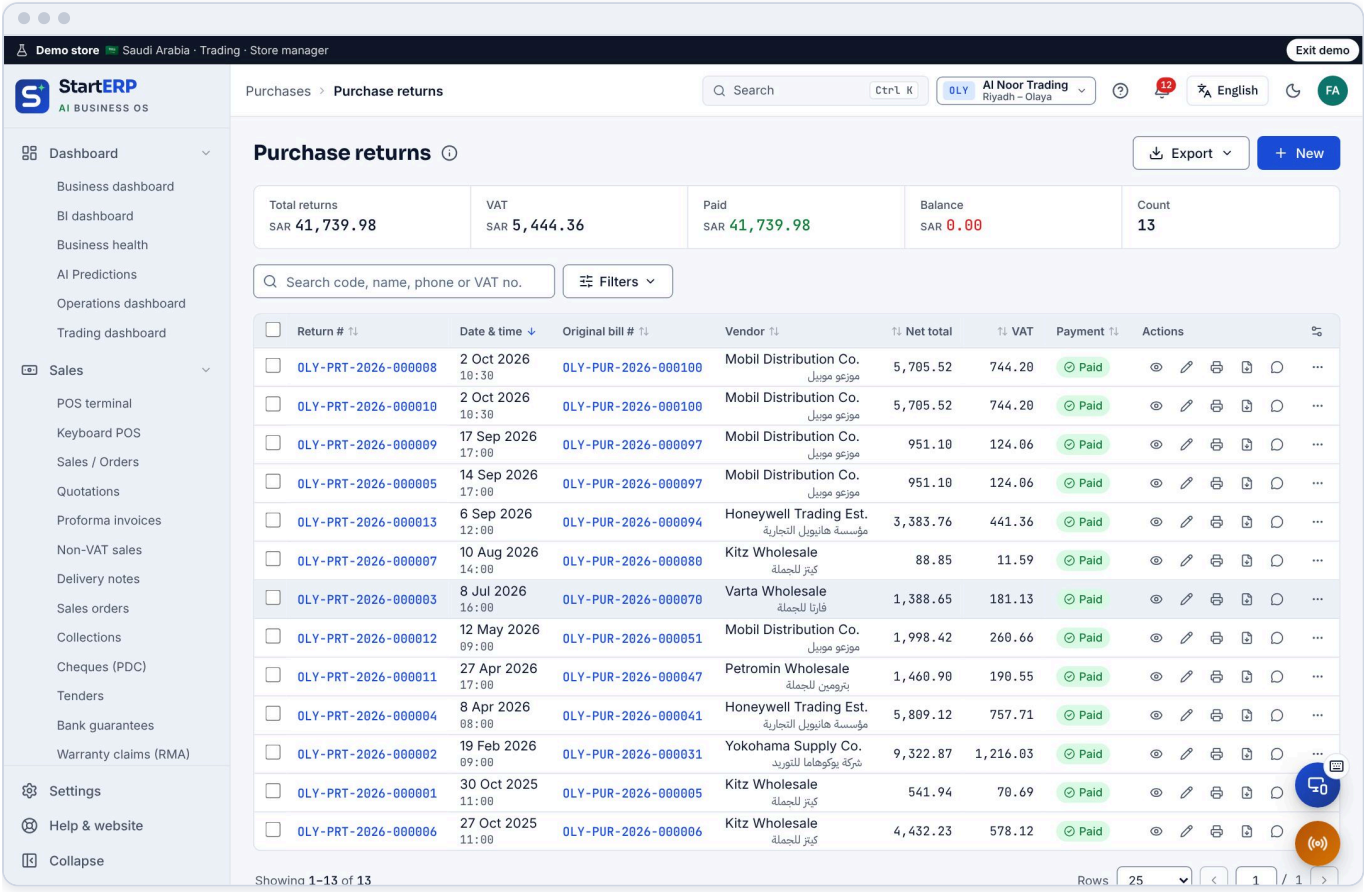
ON THE RECORD

1. Review the Vendor card (VAT No., Phone, Address, Vendor invoice no.) and the Totals card (Net total, Paid, Balance).
2. The Document card links the source purchase order or vendor bill and lists Related returns.
3. Open the Items tab for the lines with Retail profit and Wholesale profit, and the Payments tab for what was paid.
4. Click Print for A4 or Thermal Receipt for a roll printer; send it with WhatsApp or Email.
5. Click Print barcode labels to open Labels with the received items ready to print.
6. Click Create return to start a purchase return pre-filled from this bill.
7. Click Edit to change lines or record a payment; Delete removes it (stock is reversed) with Undo in the toast.

Tips. No payments yet? Use Edit, or record it later from Purchase payments → Record payment. Balance still open? "Pay with credit note" opens a vendor credit note with this vendor and purchase picked; saving it pays the purchase. A deleted purchase shows a red banner with Restore, which puts the stock back. Actions that do not fit in the header are under More actions (⋯). The History tab shows every change with who made it.

Purchase returns

Send goods back to a vendor against an original purchase. Saving removes the returned quantities from stock and records any refund you receive.



Purchase returns

ON THE LIST

1. Search by return # or vendor; the Original bill # column links to the purchase.
2. Pick a period from the date range menu (All time, Today, Last 7 days, This month… or Custom range with From / To).
3. Filter by Vendor, Payment status or Created by.
4. Check Total returns, VAT, Paid (refunds received) and Balance.
5. Tick rows to show the bulk bar: Print selected, Export selected (Excel or CSV) or Delete selected.
6. Click Export and choose Excel (.xlsx), CSV (UTF-8), PDF (list report) or JSON; the export follows the current search, filters and date range.
7. Click New to create a return, or start from the purchase with Create return.

Tips. With “Custom payment account” on in Settings, a cash or bank payment can go to any account you pick (search, filter by type, or open a new one) instead of Cash or Bank. Leave it on the default to keep using Cash or Bank. Balance on a return is the refund still owed to you by the vendor. Deleting a return puts the stock back into the warehouse. Deleted records are hidden, not lost: tick Show deleted, then use Restore from the row menu. Each delete toast also has Undo.

ON THE FORM

1. Pick the Original purchase — search by code, vendor or vendor invoice no. Vendor details and lines load from it.
2. Tick Return this item on each line being returned.
3. Adjust Qty — it cannot exceed the Returnable quantity.
4. Check prices and Bill summary.
5. Under Refund payments, click Refund in full or Add payment row for the money the vendor returns.
6. Click Create. The returned quantities leave stock.

Tips. The date cannot be in the future: it says when the sale, purchase, payment or entry happened, so the picker stops at now in your store's time (a few minutes of leeway for a device clock that runs fast). Due dates, valid-until, expected delivery and bookings can still be later. Returnable = purchased quantity minus earlier returns of the same item and warehouse. Errors you may see: "Choose the original document", "Tick at least one item to return", "Return quantity cannot exceed the returnable quantity". A warning appears when a line exceeds the stock now in the warehouse (for example, already sold). A return does not change product prices. Use Open original to check the purchase. Unsaved work is kept as a draft every 30 seconds; if you come back, choose Restore or Discard on the "Restore draft?" banner.

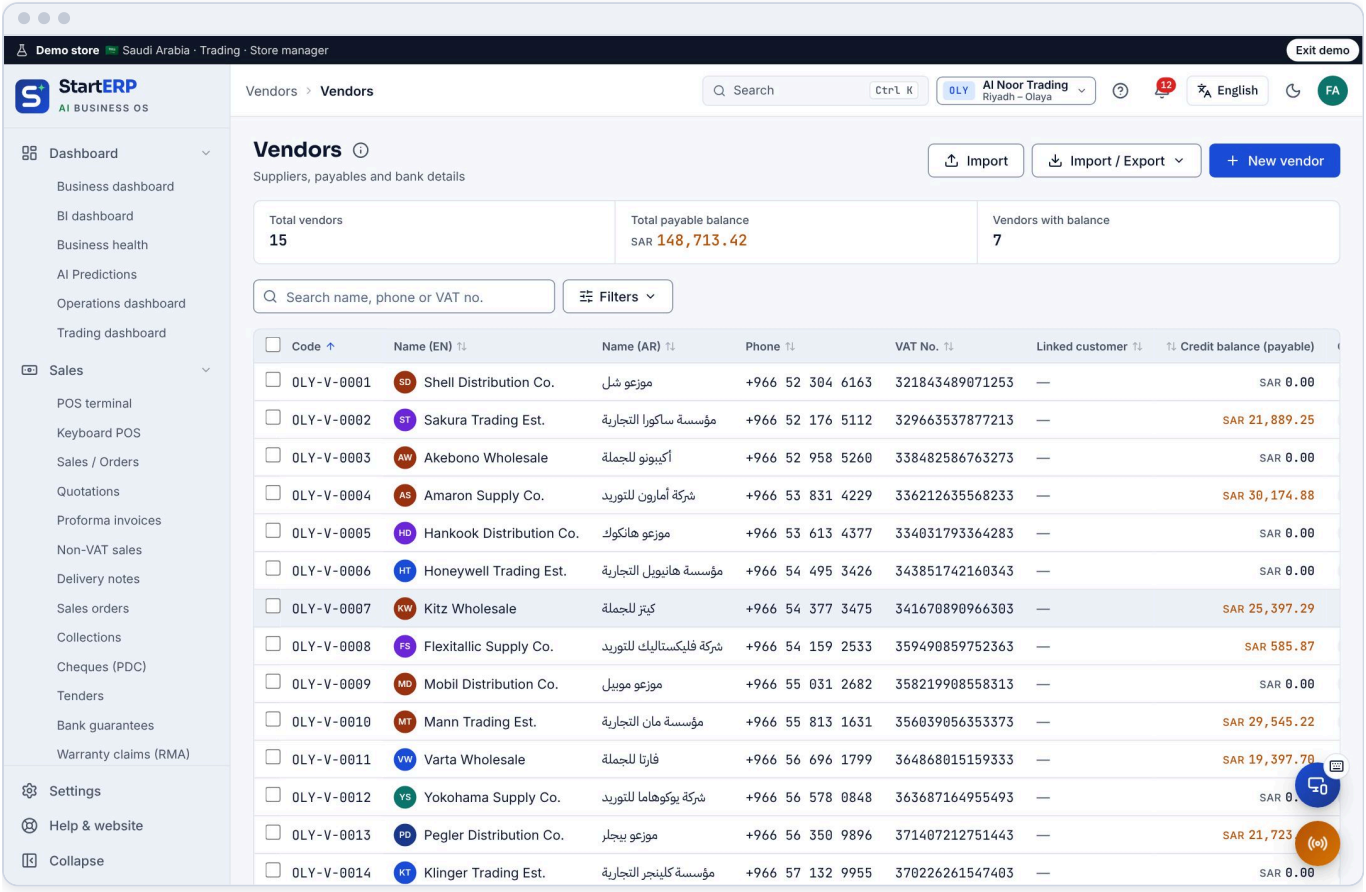
ON THE RECORD

1. Check the Original document link and the Totals (Net total, Paid, Balance).
2. Open the Items tab for returned lines and the Refunds tab for money received.
3. Print it (A4 or Thermal Receipt) or send it to the vendor by WhatsApp or Email.
4. Click Edit to record a refund later; Delete reverses the stock, with Undo.

Tips. Refunds can also be recorded from Purchase return payments → Record payment. Actions that do not fit in the header are under More actions (⋯). The History tab shows every change with who made it.

Vendors

Manage suppliers with English and Arabic names, VAT and CR numbers, bank details, national address and opening payable balance, and track what you owe each one.



Vendors

ON THE LIST

1. Click "New vendor" to add a supplier.
2. Search by name, phone or VAT number.
3. Filter by Category, or by Balance: "Has payable" or "Settled".
4. Use the "Payable balance" range to find vendors above or below an amount.
5. Open the row menu for "New purchase", or click the row to open the vendor.
6. Filter by "Linked customer" to list only vendors that share an account with a customer; the "Linked customer" column opens that customer.

Tips. Many vendors at once: press Import on the Vendors list, download the sample sheet (Excel or CSV), fill one row per vendor (name, VAT number, national address, opening balance, bank and IBAN…) and import it; every row is checked first. "Credit balance (payable)" = opening balance (payable) + unpaid purchase balances − unsettled purchase-return balances. Expenses paid to a vendor do not change the vendor balance; only purchases and purchase returns do. The IBAN column is hidden by default; show it from the column settings or include it in the CSV export.

ON THE FORM

1. Enter "Name (English)" and "Name (Arabic)" (Arabic letters only).
2. Choose categories and enter the VAT number and CR number.
3. Enter any opening balance owed to the vendor and keep the type "Payable (we owe them)".
4. Fill "Bank details" (bank name, account name and number, IBAN, SWIFT code) for transfers.
5. Under "Procurement", add "Product categories" so the vendor is matched to incoming RFQs.
6. Complete Contact and the National address, upload a logo if needed, then Save.

Tips. The logo is shown on purchase orders and RFQs sent to this vendor. Credit limit is stored for reference on vendors; it does not block purchases. Vendors created quickly from a purchase form can be completed here later. A vendor linked to a customer shows a "Linked customer" note at the top of the form. Link or unlink from the vendor's page.

ON THE RECORD

1. Review "Payable balance", "Total purchases", "Returns" and "Last transaction".
2. Use "Copy IBAN" in "Bank details" when preparing a transfer.
3. Open the Purchases, Purchase returns and Payments tabs to see each document and its balance.
4. Click "New purchase" to record a purchase for this vendor.
5. Click "Pay vendor (credit note)" to pay this vendor, against a pending purchase or in advance.
6. Use "WhatsApp" or "Email" to contact the vendor; the email includes the payable balance.
7. If the vendor is also one of your customers, click "Link a customer" in the "Linked customer" card: purchases and sales then post to one account with one balance. "Unlink" splits them again.

Tips. In Payments, "Payment made" is money you paid on a purchase; "Refund received" is money the vendor returned on a purchase return. "Payment made · credit note" and "Refund received · debit note" are the vendor's credit and debit notes; a note linked to a purchase or return is listed once, as the note. "RFQ matching" shows the product categories used to invite this vendor to RFQs. "Payable balance" counts this vendor's own documents; the line under it shows the shared account with the linked customer (receivable or payable). A linked vendor can't be deleted until it is unlinked.

06

Products

Included in every store

Every item, price and stock level under control

Keep your catalogue with barcodes, units, categories, brands and minimum stock. Print shelf and product barcode labels, and get warned before you run out of a best seller.

What you get

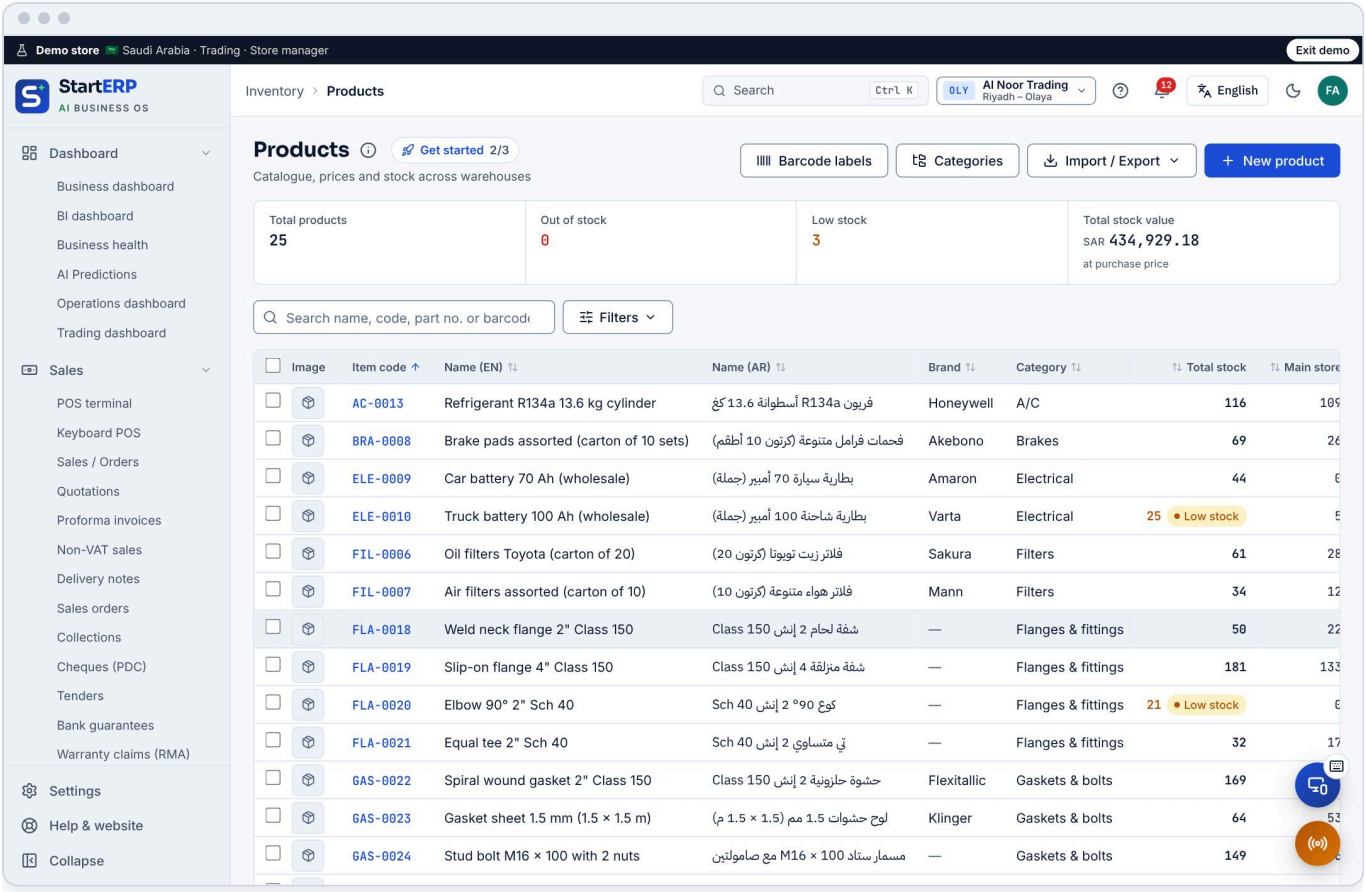
- Barcodes, units, sets and product photos
- Barcode label designer and printing included
- Live stock, cost and profit per item
- Import thousands of items from Excel

GET STARTED IN 3 STEPS

1. **Create categories.** Group products so they are easy to find.
2. **Add a product.** Price, barcode, unit and minimum stock.
3. **Print barcode labels.** Labels for the shelf or the product.

Products

Your catalogue of stocked items: codes, barcodes, prices, VAT and stock in every warehouse. Sales, purchases, transfers and repair jobs all move this stock.



Products

ON THE LIST

1. Search by name, code, part number or barcode in the search box — you can also scan a barcode into it.
2. Use the filters for Category, Brand, Warehouse, Stock, Retail price and Type (single items or sets / bundles).
3. Choose Stock → “Low (at or below min)” or “Out of stock (0)” to see what needs reordering.
4. Click “New product” to add an item, or click a row to open it.
5. Open a row’s menu for “Print barcode label”, “Duplicate” or “Stock movement”.
6. Tick several rows and choose “Print labels” to print barcode labels for all of them at once.

Tips. The cards at the top show total products, out of stock, low stock and total stock value at purchase price. Total stock value counts only stock that is there: a product sold below zero adds nothing, and the card says how many are left out. Pick Stock → “Below zero (needs a stock fix)” to list them, then fix each with a stock adjustment or the missing purchase. When the warehouse module is on, each warehouse gets its own stock column next to “Total stock”. A product is “Low stock” when its total stock is at or below the sum of its minimum levels, and “Out of stock” at zero or less. The “Barcode labels” button opens the Label Center; “Categories” jumps to the category tree. Deleted products can be brought back from the list with “Show deleted”.

ON THE FORM

1. On “Basic info”, enter “Name (EN)” (required) and “Name (Arabic)”; leave “Item code” empty to get the next code, or press “Auto”.
2. Add the “Part number”, “Unit of measure”, “VAT %”, “Product category” and brand, then type or “Generate” the barcode.
3. Under “Brand”, “+ Create new brand” adds a brand with its Arabic name and picks it; “Edit list” adds, renames or deletes brands without leaving the form (deleting tells how many products use the brand). Logo and country are set on the Brands page.
4. Under “Product category”, “+ Create new category” adds a category (with its parent, if any) and picks it; “Edit list” adds, renames or deletes categories without leaving the form. Deleting tells how many items use the category, and its sub-categories move up one level.
5. “Unit of measure” lists every standard unit code (UN/ECE Rec 20, packaging from Rec 21): type a name or a code to search (Kilogram, KGM, Box, XBX). A new product starts on Unit / Each (C62). The code goes on your e-invoices; “Unit name on bills” is the word printed on bills and labels (it follows the unit you pick, or type your own, such as Strip or Cup).
6. On “Pricing”, enter the purchase price and the retail and wholesale prices — ex. VAT, inc. VAT or as a margin %.
7. On “Inventory”, enter the opening stock, “Min stock level” and “Rack location” for each warehouse.
8. Use “Add adjustment” to add or remove stock later, with a reason.
9. On “Images”, drop up to 10 photos; the first one is the thumbnail.
10. Press “Create” (or “Update” when editing). A tab with an error shows a count of the problems.

Tips. The date cannot be in the future: it says when the sale, purchase, payment or entry happened, so the picker stops at now in your store's time (a few minutes of leeway for a device clock that runs fast). Due dates, valid-until, expected delivery and bookings can still be later. Restaurants and cafes: fill Calories (kcal per serving) and Allergens on each dish, plus Caffeine for drinks and High in salt where it applies. They show on the POS tiles and the Menu card; Saudi Arabia (SFDA) requires them on every menu item. Typing 13 digits checks the EAN-13 check digit. If it is wrong the hint shows the correct last digit; on the Barcode tab press “Fix check digit”. When editing, stock cannot be typed directly: it changes only through purchases, sales, transfers and adjustments, so every change is traced. An adjustment cannot remove more than the current stock. Choose a reason such as “Damaged”, “Expired” or “Stock count correction”, then save the product to keep it. “Duplicate” opens a new form with the same details but an empty code and barcode, zero stock and no images. Brand, country, rack, barcode tab and per-warehouse stock appear only when those options are turned on in settings. Changing the purchase price is recorded in the purchase price history shown in Analytics.

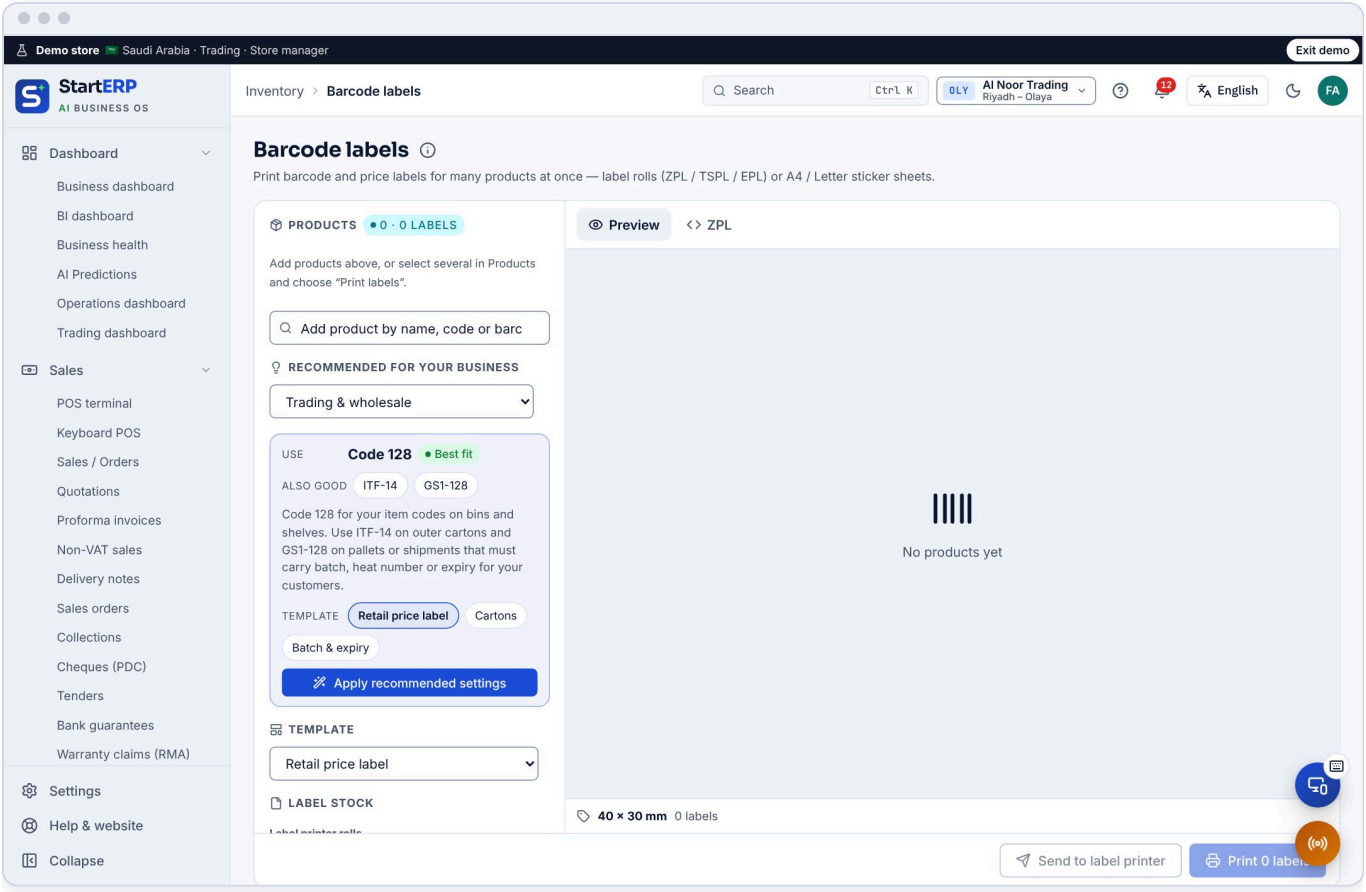
ON THE RECORD

1. Check the summary: total stock, retail inc. VAT, purchase price, retail margin, stock value and units sold in the last 30 days.
2. On “Overview”, see pricing per branch, stock per warehouse with min and rack, images and the barcode.
3. Open the history tabs (Sales, Purchases, returns, Quotations, Delivery notes, Transfers…) to see every document with this item.
4. Open “Stock movement” for the stock ledger: every in and out with a running balance.
5. Open “Analytics” for the sales trend, top customers, purchase price trend and profit margin trend.
6. Use “Edit”, “Print label”, “Share WhatsApp”, “Send email”, “Duplicate” or “Delete” at the top.

Tips. The stock ledger’s running balance is for all warehouses together; filter by warehouse to see one. “Share WhatsApp” sends the name, code, VAT-inclusive price and available stock. On sales and purchase forms, the “Info” menu next to a line opens the same history without leaving the form. A red “Check digit mismatch” under the barcode means scanners will read a different number — edit the product and fix it.

Barcode labels

The Label Center prints barcode and price labels for many products at once — on label printer rolls or on A4 / Letter sticker sheets.



Barcode labels

1. Add products with the search box, or open the Label Center from Products ("Print labels" on selected rows), from a product ("Print label") or from a purchase ("Print barcode labels").
2. Set how many labels each product needs with − / +, or press "1 each" or "Qty = stock on hand".
3. Under "Recommended for your business", pick your business type and press "Apply recommended settings".
4. Choose a "Template" and a "Label stock": a roll size for label printers or a sticker sheet for office printers.
5. Choose the "Barcode type" and what to show: store name, Arabic name, price, digits under the barcode.
6. Check the "Preview", then press "Print … labels" for the print dialog, or "Send to label printer" for a configured label printer.

Tips. Opening it from a purchase fills in every received item with quantity = received quantity, ready to stick on the new stock. Sheets: set “Start at label #” to skip labels already used on a part-used sheet. Rolls print one label per page at the exact size. “Store name on label” can be Off, English, Arabic (عربي) or Both, at the top or bottom, with “Add branch”. Leave the text empty to use the registered store name; Arabic always prints right-to-left. Not sure which barcode? Open “Which barcode should I use? Compare all types”. “Auto” uses a valid EAN-13 and otherwise prints the item code as Code 128. For Zebra, TSC, Xprinter and similar printers choose ZPL II, TSPL or EPL2 and 203 / 300 dpi; the code tab shows the raw commands you can copy. The currency starts as your store's own, with VAT where the country has it (for example “AED (incl. VAT)” in the UAE); in Saudi Arabia shelf prices must include VAT. Items with a wrong EAN-13 check digit are printed as Code 128 so scans still match.

07

Services

Add-on module

Sell your time and expertise, not just goods

Set up the services you sell, priced by job, by hour or as a package, and put them on invoices and the POS next to products. No stock to count, every service tracked in sales and profit.

What you get

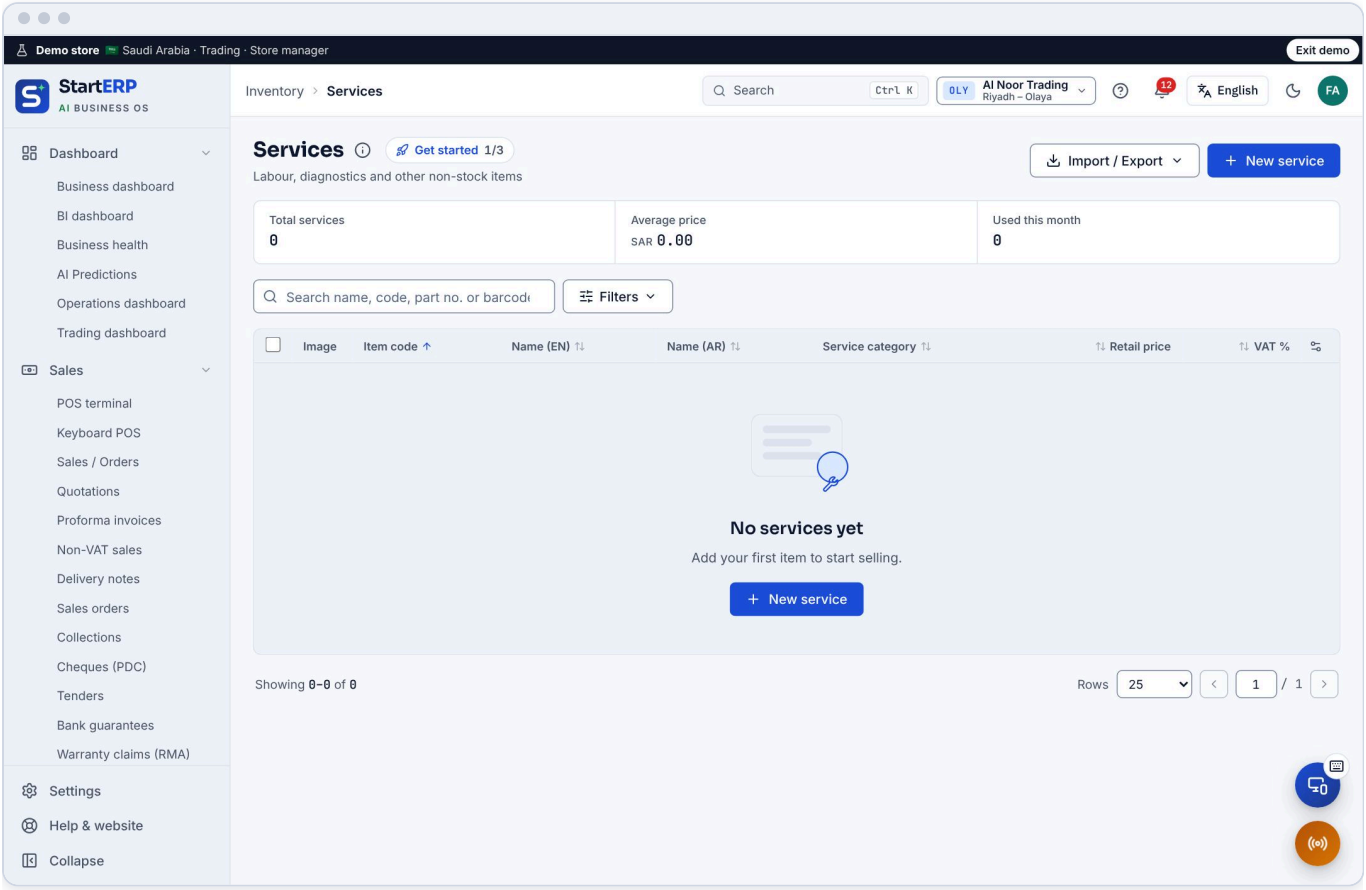
- Service items with their own price and VAT
- Sold on invoices and every POS terminal
- Sales and profit reports per service
- No stock counts for things you do not stock

GET STARTED IN 3 STEPS

1. **Add a service.** Priced by job, by hour or as a package.
2. **Bill it.** Put it on an invoice or the POS next to products.
3. **See what it earns.** Service sales and profit in your reports.

Services

Labour, diagnostics and other non-stock items you sell. A service has a price and VAT but no stock, so it never runs out.



Services

ON THE LIST

1. Search services by name or code.
2. Filter by Service category or Retail price.
3. Click “New service” to add one, or click a row to open it.
4. Use a row’s menu to “Duplicate” a similar service.

Tips. The cards show total services, average price and how many were used on invoices this month. Product vs service: products are counted in warehouses and need purchases; services are only sold.

ON THE FORM

1. Enter “Name (EN)” and “Name (Arabic)”; leave “Item code” empty for the next code.
2. Pick the “Service category”, the “Unit” (e.g. Each / Per visit or Hour) and “VAT %”.
3. Under “Service category”, “+ Create new service category” adds one and picks it; “Edit list” adds, renames or deletes service categories without leaving the form.

4. Optionally set the “Duration”, the “Delivery mode” and “Booking / appointment required”, and describe the service.
5. On “Pricing”, enter the retail price ex. VAT or inc. VAT.
6. Optionally add images, then press “Create”.

Tips. Services have no Inventory, Barcode or Set tabs and are never deducted from stock. On a repair job, labour is usually entered as the “Labour charge”, but you can also add a service as a line.

ON THE RECORD

1. See the retail price inc. VAT and the quantity sold in the last 30 days.
2. Open the Sales, Quotations and returns tabs to see where the service was used.
3. Open “Analytics” for the sales trend and top customers.
4. Use “Edit”, “Duplicate” or “Delete” at the top.

Tips. There is no stock movement tab for services because nothing is stored. “Share WhatsApp” sends the service name and VAT-inclusive price to a customer.

08

Customer management

Included in every store

Know every customer and what they owe

Keep each customer's contact details, VAT number, credit limit and full statement in one place. See who is overdue and stop selling on credit beyond the limit you set.

What you get

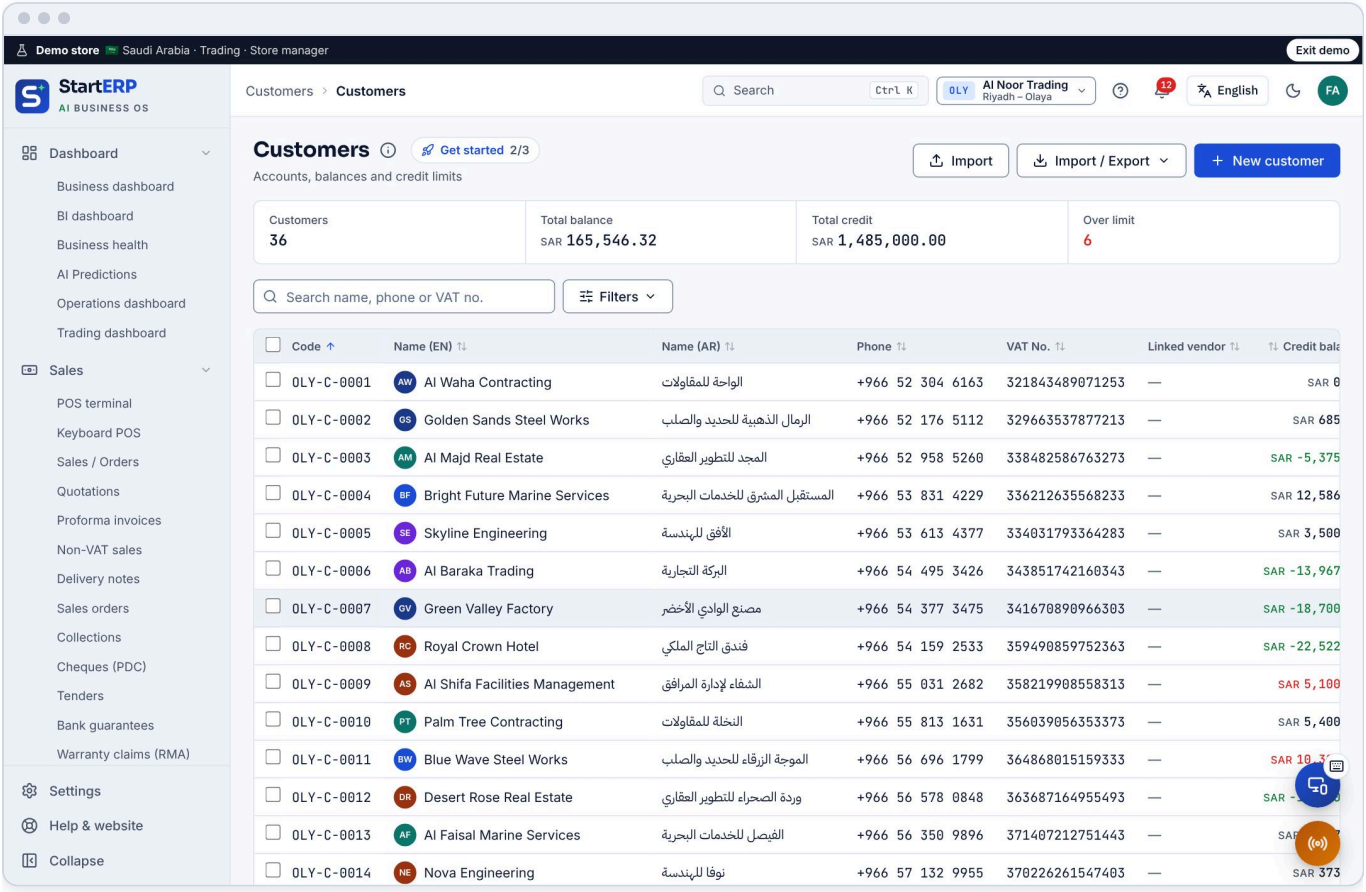
- Account statement and balance per customer
- Credit limits enforced at the counter
- VAT and national address for B2B invoices
- Overdue list for quick follow-up

GET STARTED IN 3 STEPS

1. **Add a customer.** Contact details, tax number and credit limit.
2. **Sell to them.** Invoices and payments build their statement.
3. **Check who owes you.** Open a customer to see and share the statement.

Customers

Keep every customer with legal names in English and Arabic, VAT and CR numbers, national address, credit limit and opening balance, and see their live balance and statement of account.



Customers

ON THE LIST

1. Click "New customer" to add a customer.
2. Use the search box ("Search name, phone or VAT no.") to find a customer quickly.
3. Filter by Category or Status; choose "Over limit" to see customers above their credit limit.
4. Type a Min and Max in the "Credit limit" or "Balance" ranges to narrow the list; "Reset ranges" clears them.
5. Open the row menu (⋯ or right-click) for "New sale" or "New debit note" without opening the customer.
6. Click a row to open the customer page with the balance and statement.
7. Filter by "Linked vendor" to list only customers that share an account with a vendor (or only those that don't); the "Linked vendor" column opens that vendor.

Tips. Many customers at once: press Import on the Customers list, download the sample sheet (Excel or CSV), fill one row per customer (name, Arabic name, phone, VAT number, national address, credit limit, opening balance…) and import it; every row is checked first. "Credit balance" is what the customer owes you now: opening balance + unpaid invoice balances − debit notes + credit notes. A negative balance (shown in green) means the customer has credit with you, for example an unused advance debit note. A red "Over limit" badge appears when the balance is higher than the credit limit. A limit of 0 means "No limit". The stats bar totals only the rows currently shown, so filters change the totals. Deleted customers can be restored from "Show deleted". A linked customer's balance is the shared account's balance: what they owe you as a customer less what you owe them as a vendor.

ON THE FORM

1. Enter "Name (English)" (required) and "Name (Arabic)" in Arabic letters.
2. Pick one or more categories and fill the VAT number and CR number for business customers.
3. Set a "Credit limit" if you sell on credit, and the "VAT %" that applies.
4. If the customer already had a balance before StartERP, enter the opening balance, its type and date.
5. Fill phones and email in "Contact", then the "National address (Saudi)" as registered with Saudi Post.
6. Optionally upload a profile photo, then press Save (Ctrl+S).

Tips. The opening balance shows as the first line of the statement, dated by "Opening balance date". Customers can also be created quickly from a sales or debit note form with "New customer"; add the full national address later here. Unsaved changes are kept as a draft; you will be offered to restore them next time. Set Status to "Inactive" instead of deleting a customer who has history. A customer linked to a vendor shows a "Linked vendor" note at the top of the form with a link to the vendor. Link or unlink from the customer's page.

ON THE RECORD

1. Check the tiles: "Balance (receivable)", "Credit limit" usage, "Total invoiced" and "Last transaction".
2. Open the "Statement" tab for the running balance from the opening balance.
3. Click "Print statement" to print or save the statement of account as PDF.
4. Click "WhatsApp" to send the current balance with the statement; "Email statement" sends it by email.
5. Use "Quick actions" for "New sale", "New quotation" or "New debit note" for this customer.
6. Review the Sales, Payments, Debit notes and Credit notes tabs; click a row to open the document.
7. If the company is also one of your vendors, click "Link a vendor" in the "Linked vendor" card, pick the vendor, check the preview and press "Link": both now share one account and one balance.

8. When both already have a balance, choose "Keep the customer's account" or "Keep the vendor's account": the other account's postings move into it.
9. Click "Unlink" to split them again: each one's documents go back to its own account.

Tips. The Sales tab lists the invoices of the last 12 months and its Total adds up those rows; the Overview tab adds up every invoice, older ones included. Statement lines: invoices are debits; payments, cash discounts and debit notes (advance or linked to an invoice) are credits; credit notes (refunds) are debits. The "Over credit limit" badge and a red usage bar appear when the balance exceeds the limit; sales forms also show the remaining "Available" credit. WhatsApp is disabled until the customer has a phone number. The printed statement lists the latest 40 transactions; the Statement tab shows all of them. "Advance debit notes" in the account summary counts only debit notes not linked to an invoice. A customer and a vendor with the same name and VAT number are linked automatically when their account is first created. The merged account is kept (soft-deleted) and comes back when you unlink. A linked customer can't be deleted until it is unlinked. "Balance (receivable)" counts this customer's own documents; the line under it and the "Linked vendor" card show the shared account's balance.

09

User management

Included in every store

Give each person the right access

Add as many users as you need at no extra cost and give each one a ready-made role: Admin, Manager, Salesman, Cashier, Accountant or Viewer. Everyone signs in on their own device.

What you get

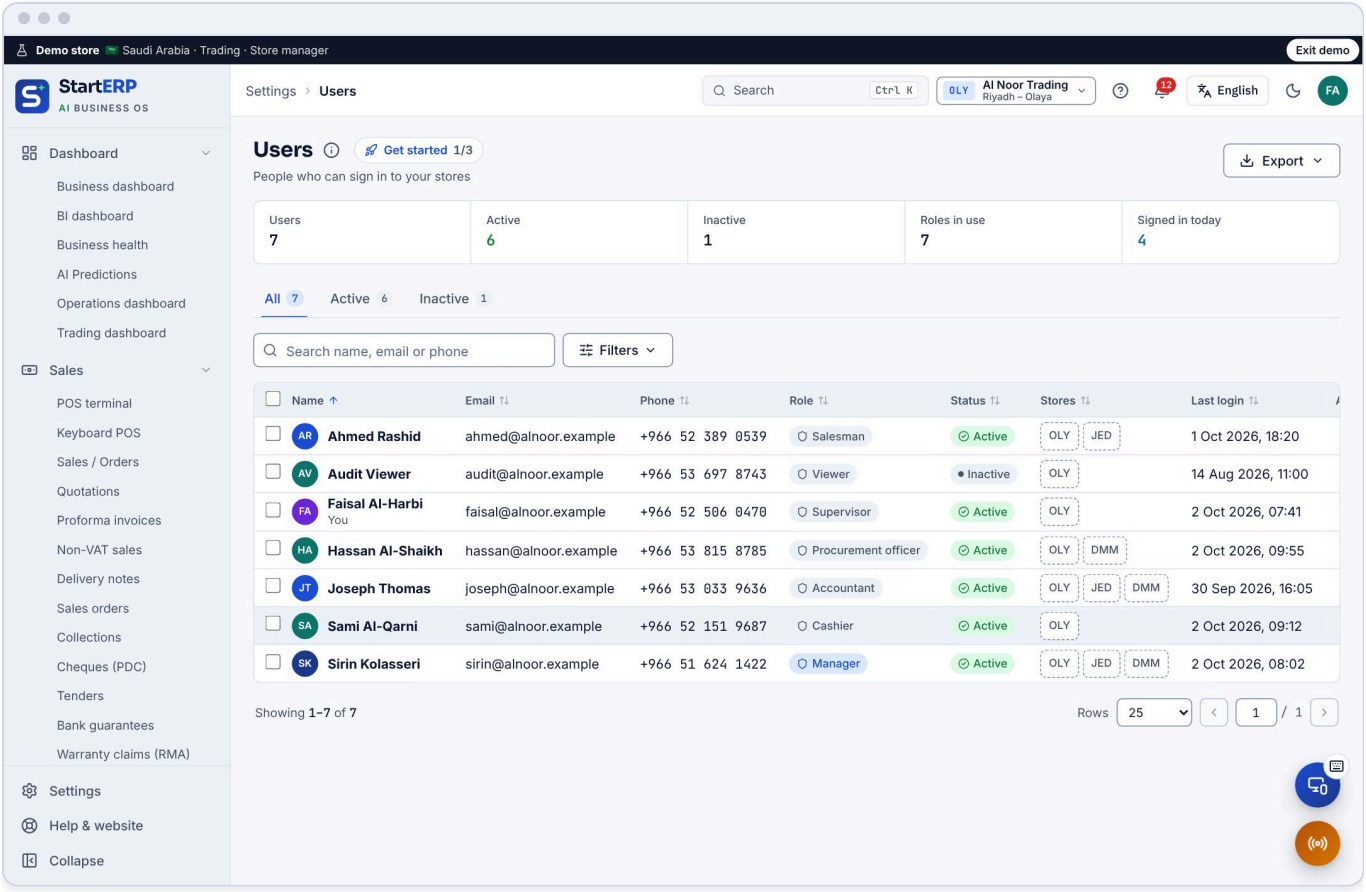
- Unlimited users on every plan
- Six ready-made system roles
- Per-user store access
- Activity history on every record

GET STARTED IN 3 STEPS

1. **Add a team member.** Name, email or phone and a password.
2. **Give them a role.** Admin, Manager, Salesman, Cashier, Accountant or Viewer.
3. **Let them sign in.** They sign in on their own phone, tablet or computer.

Users

People who can sign in to your stores: create and invite users, assign a role and stores, disable access and reset passwords.



Users

ON THE LIST

1. Click New user to create and invite someone.
2. Search by name, email or phone, or filter by Role, Status or Store; use the Active / Inactive tabs.
3. Use the row actions to Edit, Change password or Disable / Enable a user.
4. Click a row to open the user and see their effective permissions and sessions.

Tips. Disabling a user signs them out everywhere and blocks sign-in until you enable them again; Undo is offered right away. You cannot disable your own account. When changing a password for someone, keep "Require a new password at next sign-in" ticked so only they know the final password. A user who lost their phone and recovery codes: open the user and press “Reset 2-step verification”; they set it up again at their next sign-in. Managing users requires a role with "Can manage users".

ON THE FORM

1. Enter the Full name, Email and Phone; all three are required.

2. For a new user, set a Password and Confirm password; the strength meter must show at least Fair.
3. Choose a Role and check the Role permissions panel to see what it allows.
4. Pick the Assigned stores the user may work in.
5. Leave Status on Active, then click Save. The new user signs in with this email and password. If the server refuses something (for example an email already in use), the field says why and no user is created.

Tips. You cannot change your own role or deactivate yourself. To change an existing user's password use Change password on the list or user page — the edit form does not include it. The user can change their password after the first sign-in from My profile.

ON THE RECORD

1. Review the Role, Stores, Permissions and Max discount tiles at the top.
2. Open Effective permissions to see the matrix the user actually gets; Open role jumps to the role.
3. Check Sessions for the devices where the user is signed in.
4. Use Edit, Change password, Disable / Enable or Delete from the actions.

Tips. Prefer Disable over Delete for staff who leave — history keeps their name and you can enable them again. A disabled account has no access at all, whatever its role allows. Delete and Disable are hidden on your own account.

Set-up, help and training

The StartERP team sets up your store, imports your products, customers and opening balances from Excel or CSV, and trains your users on the screens they use.

> **Need an add-on module?** Ask your StartERP contact to switch it on for your store, or write to **sirin@starterp.org** or WhatsApp **+966 50 197 1075**.

The full set of module guides

#	Guide
1	**The basics every store has (this guide)**
2	Selling and documents
3	Customers, CRM and loyalty
4	Restaurants and cafés
5	Purchasing and inventory
6	Finance and accounting
7	HR and payroll
8	AI, automation and reports
9	Online, integrations and control
10	Industry modules
11	Hospitals, clinics, pharmacies and opticians
12	Law firms
13	Hotels and resorts
14	Real estate agencies

All guides can be downloaded in StartERP under Help → User guides.



StartERP

AI BUSINESS OS

Run your whole business in one place.

starterp.org · sirin@starterp.org · +966 50 197 1075