StartERP
AI BUSINESS OS

MODULE GUIDE 8 OF 14

AI, automation and reports

An AI assistant that answers from your figures, a Business Advisor that says what needs a decision and why, a daily brief with the actions waiting for your yes or no, AI document reading, automatic rules and reports, BI dashboards and a document store. Step-by-step instructions for each of the 9 modules, with the real screens you will use.

AI assistant · Business Advisor · AI Predictions · StartAI daily brief · StartAI Radio · AI document reading · Automation & scheduled reports · Analytics & BI · Document management

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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. Some modules are made for certain kinds of business or for one country, and the label says which.

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), each taken in the kind of business the module is made for, 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
AI assistant Add-on	Ask about your business in plain words, by typing, by voice or in a spoken conversation, and get the answer with charts and tables from your own records: sales, stock, customers, vendors, expenses and accounts, across all your stores. Connect the AI models you like, from Claude, GPT, Gemini, Mistral and many more, including free ones; each model shows what a question costs, cheapest first, and your last model is picked again next time. The assistant can also do the work for you, such as creating a quotation or recording a payment, and only after you confirm what it will do. A monthly spending limit in your currency keeps the cost in check. The AI providers' charges are billed to your own API keys

Business Advisor Add-on	Advice from your own figures every day, each with the money at stake and a ready action: products to reorder, customers to chase, sales below cost, discounts above the usual, a slower month, regular customers who stopped coming, stock that does not sell, thin margins, IDs and batches about to expire and a business losing money. Act, snooze or dismiss in one tap, ask StartAI why, and send it to the people you pick by email, WhatsApp and notification.
AI Predictions Add-on	See what is coming before it happens: the next 4 and 13 weeks of sales with a safe range, the products about to run out and how much to order, which categories are rising or falling, the customers likely to stop buying and the days that looked unusual, each forecast tested on your own past sales with its error shown
StartAI daily brief Add-on	Every morning yesterday in a few lines on email, WhatsApp and in the app: sales against the same day last week, what customers owe, the products to reorder, the customers to remind and the invoices with a large discount or a line sold below cost; say yes and the purchase order or the WhatsApp reminder is ready
StartAI Radio Add-on	A radio button beside StartAI's: switch it on and the store's business news is read aloud as it happens, with captions: the hour's sales against the same day last week, a large sale, the best seller, a product that ran out, a payment received, the till opened or closed, and in the afternoon what customers owe and the week so far; choose how much it says, cashiers and shared screens hear no amounts and no names, and every day's bulletins are kept for 30 days to read back
AI document reading Add-on	Drop a photo or PDF of a passport, an ID or residence card, a work permit, a trade licence, a commercial registration or a VAT certificate and Claude reads it into the form for you: the papers of your country, front and back of a card in one go. Every reading is checked before you use it: the check digits of the passport and ID lines, the ID, VAT and GST number rules, dates in order and the expiry; anything Claude could not read clearly is marked. You correct what needs it, then file the paper in Documents, update the employee's record or start a new customer from it. A monthly spending limit in your currency stops readings when it is reached, and the usage screen shows what each reading cost, by paper, person and day. Claude's charges are billed to your own Claude API key

Automation & scheduled reports Add-on	Rules that work for you: remind customers of overdue invoices on WhatsApp, follow up quotations, alert the team about low stock, batches and Iqamas about to expire, thank customers after a sale, email or call a webhook, with quiet hours, a daily limit, a test run and a run log; and reports sent by themselves daily, weekly or monthly as PDF or Excel, like the owner's daily summary
Analytics & BI Add-on	Sales analytics and the BI dashboard
Document management Add-on	Every ID, licence and contract of staff, clients and the business, with expiry alerts

01 AI assistant

Add-on module

Ask your business a question and get the answer

Type, speak or hold a spoken conversation in plain words, such as "which products sold best last month?" or "who owes us more than 5,000?", and the assistant answers from your own records with charts and tables, across all your stores. Connect the AI models you prefer, from Claude, GPT, Gemini, Mistral and more, including free ones; each shows what a question costs. It can also do the work, such as creating a quotation or recording a payment, but only after you confirm what it will do, and a monthly limit in your currency keeps the cost in check.

What you get

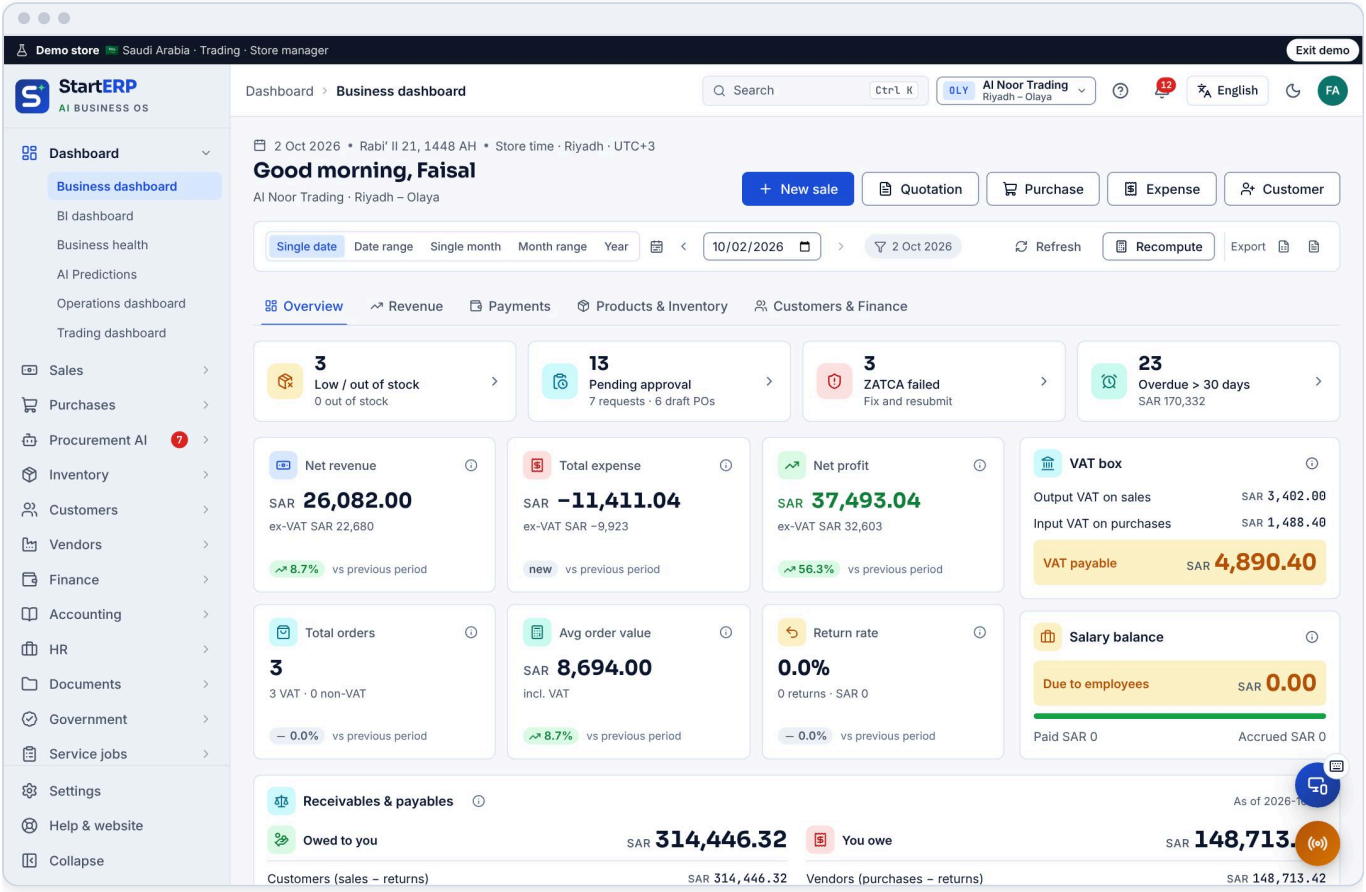
- Answers with charts and tables from your sales, stock, customers and accounts
- Type, ask by voice or hold a spoken conversation
- Says what needs a decision today with the Business Advisor, and creates quotations, orders or payments only after you confirm
- Your own AI keys, the cost of each question and a monthly limit

GET STARTED IN 3 STEPS

1. **Connect an AI model.** Claude, GPT, Gemini or a free one.
2. **Ask your first question.** Such as "best sellers last month".
3. **Set a monthly limit.** See what each question costs.

AI assistant chat

StartAI is a chat with your store's AI assistant, on every screen: type, dictate or talk, and it answers from your real records with charts, tables and figures. It can compare your stores and prepare changes (a new customer, a new price…) that happen only when you press Confirm. Part of the AI assistant add-on.



AI assistant chat

1. StartAI goes by a first name that fits the language you use and your store's country, shown at the top of its window and in its greeting. In English it takes the country's name: Noura in Saudi Arabia, Mariam in the UAE, Meera in India, Olivia in the UK, and so on. Pick Malayalam and it takes a Kerala name, Devika (Urdu: Ayesha, Bangla: Nusrat, French: Camille, Arabic: Noura, unless your country already speaks that language and has its own). StartAI Radio's presenter has a name of their own the same way, such as Faisal, or Arun in Malayalam. Ask "who are you?" and it tells you its name.
2. Each name matches its voice: StartAI has a woman's name and speaks with a woman's voice, and StartAI Radio's presenter has a man's name and speaks with a man's voice. With the browser's own voice, a voice of the same kind is chosen when the device has one.

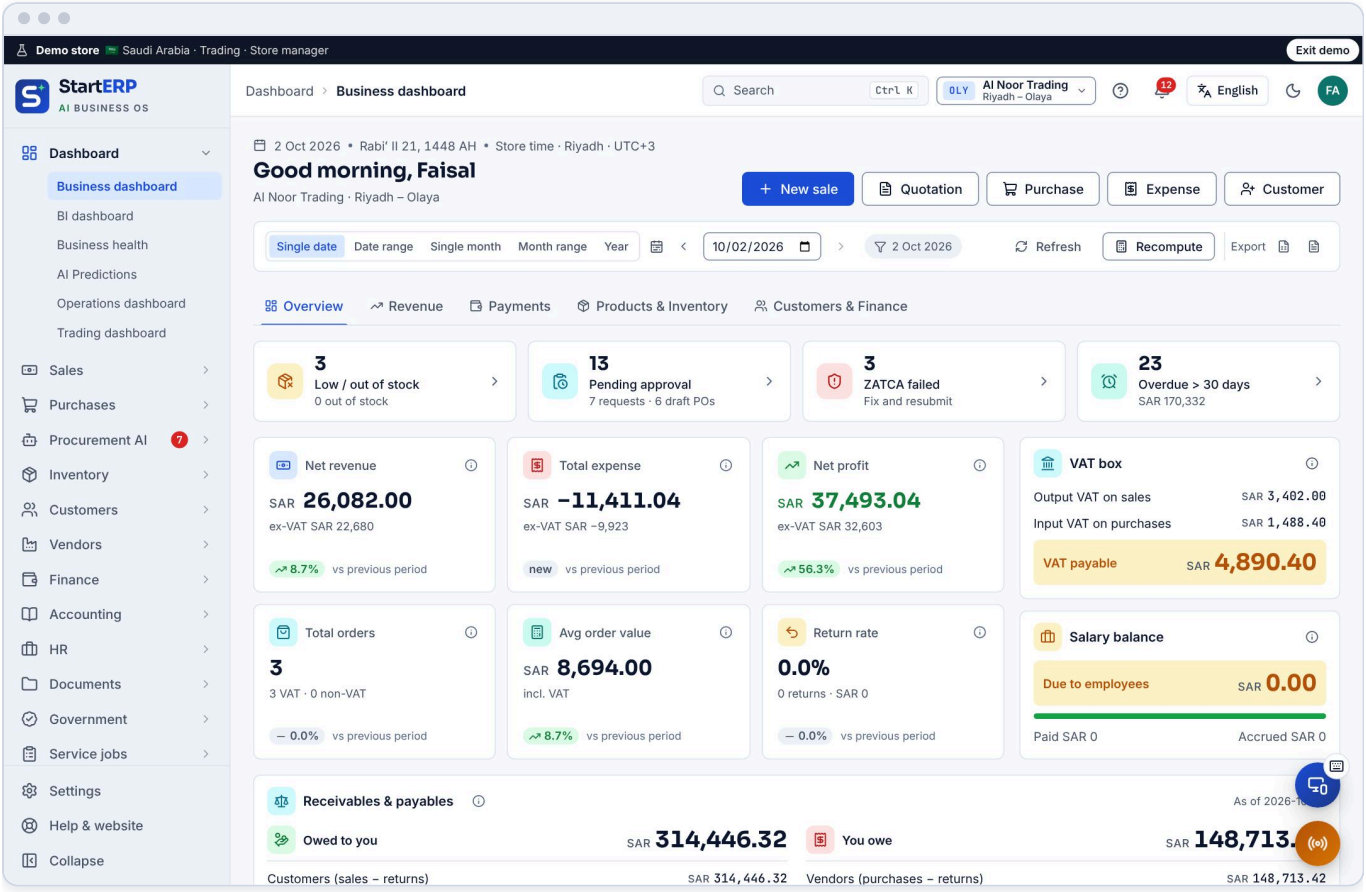
3. Press Ask StartAI, the round chat bot button at the bottom corner of any screen, to open the chat in a window; the size button at its top makes the window large or small again. If the button is in the way, press the small – on its corner to tuck it into a tab on the screen's edge; press the tab to bring it back (your choice is kept). Pick the AI model in the bar under the question box: the cheapest are first with the cost of a typical question, and the one you used last is picked for you.
4. Type a question and press Enter, or press the microphone to dictate it. The answer streams in with the steps the assistant took and any chart or table it drew.
5. Ask in your own words, for any period: "top selling products this month", "slowest products last quarter", "which category sold most in 2025", "who bought the most of this product", "unpaid invoices over 30 days", "stock value by warehouse" or "the cash account's ledger last week". Periods are worked out in your store's time zone, and every total is added up on the server over all your records, as on the reports.
6. To ask about a file, press the paperclip (or paste an image, or drop files on the question box) and attach up to 5 files: images, PDFs, text or CSV, Excel (.xlsx) or Word (.docx), 10 MB each. Ask your question, or just press Send to have the file read. Attached files are kept with the conversation; press a file's name to open it again.
7. Press Talk to have a spoken conversation: speak, and the answer is read aloud as it arrives. Speak again to interrupt; press End talk to stop. Talk voice, next to the model under the question box, picks the voice: any realtime model you connected or the browser's voice; your pick is kept. Talk language, beside it, is the language Talk listens and speaks in: your country's official language until you pick another (Hungarian in Hungary, German in Germany; English in India and where the voice does not speak the language). Your pick is kept for you and StartAI Radio uses it too.
8. Ask it to add or change almost anything in your own words: "sell 2 brown bread to Al Noor, paid cash", "make a quotation for 10 chairs at 120 for Gulf Supplies", "record October rent of 5,000 by bank transfer", "add customer Al Noor Trading 0551234567", "set the retail price of brown bread to 6". It reads the form of that record, finds the customer, products and other details in your data, checks the change the way the screen does, and asks you if something is missing. Then it shows a card: each line with its quantity and price and the total with VAT for a new document, or each field as it is now and as it will be for a change. Press Confirm, or Cancel. Besides adding and editing records, it can approve or reject requests and leave, make a customer from a lead, post a stock count, invoice a service job or report an invoice to ZATCA. It runs with your permissions and is recorded in the record's history.

9. Ask it to email someone: "email invoice INV-0012 to Al Noor", "send the purchase order to Gulf Supplies", "remind Al Noor about the unpaid invoices". It takes the address from the customer or vendor (or asks you), writes a short message and shows a card with To, Subject, Message and the document. Press Send and it goes from your store's own mail account with the document's PDF attached, as the Email button sends it. Set up Settings → Email → Outgoing mail (SMTP) first; the assistant tells you when it is missing. It prepares at most five emails per answer and 50 a day per store.
10. Open Conversations to go back to an earlier chat, or + to start a new one.

Tips. The assistant reads only what you can see in the app and can never delete anything. Until your store connects its own AI provider, StartAI answers with free models, for chat and Talk, up to a set number of answers a day; the line under the question box shows how many are left today. Connect a provider in Settings → AI models for faster, more accurate answers. In a demo store opened with your email address, StartAI answers from the demo's own records on the free models: figures, product sales, totals, lists and charts. Talk speaks with Gemini Live, and a Talk session counts as one question. It cannot change anything there or read files. Images and PDFs need a model that reads images (most Claude, GPT and Gemini models do); the assistant says so when the picked model cannot. Deleting a conversation deletes its files too. When the assistant cannot answer a question properly, it says so and notes the question for the StartERP team, who use these notes to improve it. Your store's administrators see them in Settings → AI models. Settings → AI models shows what this month's questions cost and lets an admin set a monthly limit. MCP server in Settings → AI models makes a key for Claude Desktop, Claude Code, Cursor or any MCP client to read this store's data with the same tools. Switch on Allow changes for a key to let that app also add and change records and send emails (without the PDF, which only the app makes): each change comes back as a preview first and runs only when the app calls confirm_action, which it asks you to approve. Nothing can be deleted. The key is shown once; remove it to stop the client. When the store has connected OpenAI with a realtime model (gpt-realtime) or Google (Gemini Live), Talk is a realtime voice call: answers start almost at once and you can interrupt by speaking. Otherwise Dictation and Talk use your browser's speech recognition (Chrome, Edge and Safari). Allow the microphone when asked.

AI connections

Connect the AI models your team's AI assistant may use: Claude, GPT, Gemini, Mistral, DeepSeek, Grok, OpenRouter's free models, your own Ollama server and more. Each connection uses your own API key, is tested before it is saved, and lists its models cheapest first with what a typical question costs in your currency. Part of the AI assistant add-on.



AI connections

1. Open Settings → AI models and press Add connection.
2. Choose the provider. The window shows its cheapest models that can use your data and where to get a key.
3. Paste the API key (for your own server, its API address too). Tick the free tier switch if your key is on the provider's free tier.
4. Press Test and add. StartERP asks the provider for its models; a refused key is not saved.
5. In Models, switch on the models your team may pick and press Save. The newest models that can use your data are on already, and so are the free ones: every free OpenRouter model and every Gemini free-tier model (Flash, Flash-Lite, 2.5 Pro and Gemma). Press Test on a connection to add new free ones.

Tips. Your key is stored encrypted and shows only as its last four characters. Leave it as it is when you edit a connection to keep it. Prices are the providers' list prices for a typical question (about 6,000 tokens in and 700 out), updated daily. The provider bills your key directly. Test checks a connection again; Remove deletes it and its key. Only people who can edit the settings change connections. Without the AI assistant add-on you can browse the models and prices; add it under Subscription & billing to connect them. With no connection of your own, StartAI uses StartERP's free models, a set number of answers a day. Once you add a working connection, only your own models are used.

02

Business Advisor

Add-on module

Know what needs a decision today, and act on it

The Business Advisor reads your own sales, stock, customers, staff and costs every day and tells you what needs a decision, ranked by the money at stake: products about to run out, customers to chase, sales below cost, discounts above the usual share, a slower month, regular customers who stopped coming, stock that does not sell, best sellers with a thin margin, IDs and batches about to expire, and a business losing money. Each piece of advice comes with its action: a purchase order ready for each supplier, a WhatsApp message to each customer, or the screen to put it right, and nothing is saved until you confirm. Its AI agent goes further: with every StartAI tool it checks each advice's cause in your records, says what it found and prepares the purchase orders, price changes and emails for your Confirm, on request or every morning before the advice goes out. It goes to the people you pick, each by email, WhatsApp or notification and only for their areas.

What you get

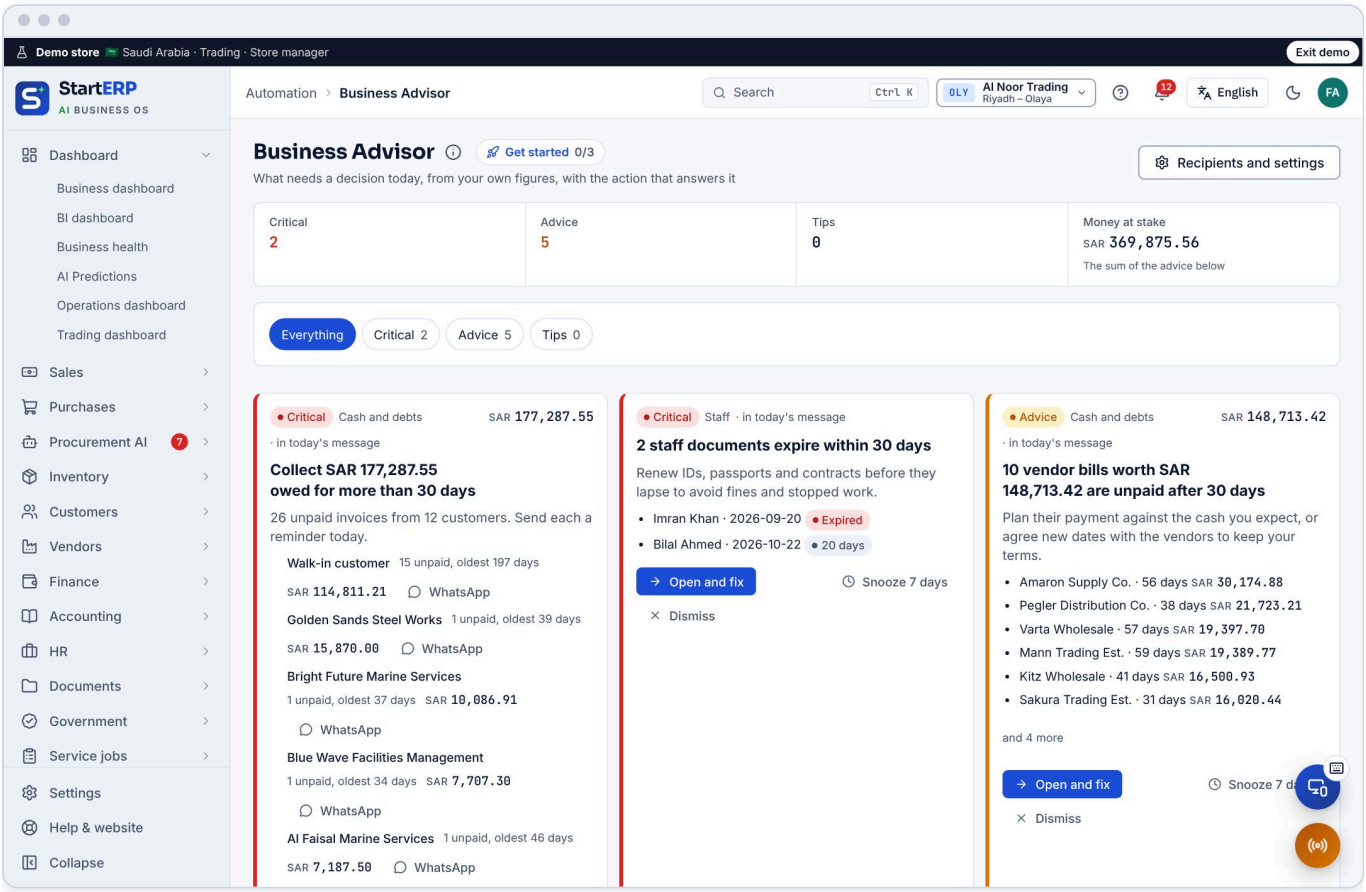
- Advice ranked by the money at stake, critical first
- A ready action on every advice: purchase orders, reminders, price fixes
- Sent to the people you pick by email, WhatsApp and notification
- An AI agent that checks the cause and prepares the fix, acting only after you confirm

GET STARTED IN 3 STEPS

1. **Pick who gets it.** People, channels and the time.
2. **Read today's advice.** Ranked by the money at stake.
3. **Act, snooze or dismiss.** One tap; StartAI explains why.

Business Advisor

Advice from your own figures, ranked by the money at stake, each with a ready action: products to reorder, customers to chase, sales below cost, discounts above the usual share, this month's pace, regular customers who stopped buying, stock that does not sell, best sellers with a thin margin, staff documents and batches about to expire, customers at their credit limit, tills closed short, supplier bills unpaid past their days, and a business losing money. The day's advice goes to the people you pick by email, WhatsApp and notification.



Business Advisor

1. Open Automation → Business Advisor. Critical advice comes first, then advice and tips; each card shows the money at stake and what it is based on. Use the chips to show one level.
2. Press the card's action: Create purchase order opens a new purchase order with the vendor's products and quantities; WhatsApp beside a customer opens a polite reminder or a we-miss-you message; Fix the prices and Open and fix open the screen to put it right. Nothing is saved until you save that screen.
3. Press Let the AI agent work on it (or Ask StartAI why on one card): the Business Advisor agent checks each advice's cause in your records with all of StartAI's tools, says what it found and prepares the purchase orders, price changes, emails or dismissals; each waits for your Confirm.
4. Snooze 7 days hides an advice for a week; Dismiss hides it for 30 days and asks why, so the advisor learns what matters to you. An acted advice is hidden for 7 days.

5. Press Recipients and settings to switch the daily message on, set its time and language, how many pieces of advice go out a day, and pick the people: for each one the channels (email, WhatsApp, notification), the lowest level they get and the areas they look after.

Tips. Critical advice always goes out, even above the daily number. With nobody picked, the store's admins get it by email and notification. Email needs Outgoing mail (SMTP) in Settings › Email; WhatsApp is sent through the WhatsApp Business API with an approved template, otherwise a ready Send on WhatsApp link is kept. Critical advice that appears during the day, such as a cashier closing the till short again, is sent at once to the people who get critical advice, at most once an hour and never twice for the same advice. Switch off Send critical advice at once in the settings to keep it for the daily message. Every figure is worked out from your own sales, stock, customers, employees and costs, the same figures the BI dashboard, the reorder board and Business health show. With less than two months of sales the advice says it is a first look. Switch on Let the AI agent work on it each morning in the settings: before the advice goes out, the agent works on it as you, its findings go out with the advice and show on this page, and its prepared changes wait for your Confirm in StartAI. Ask StartAI "what should I do today?" and it reads the advisor's advice and can prepare the actions for your Confirm.

03

AI Predictions

Add-on module

For: Industrial Supplies, Health and Safety Store, Paint store & colour centre, Electrical store (retail & wholesale)

Saudi Arabia only

See next month before it happens

Know your next 4 and 13 weeks of sales with a safe range, from the forecasting method that was most accurate on your own last four periods, and see its measured error. Find the products that will run out before an order can arrive and how much to order, with big project orders kept apart so they do not inflate everyday demand. See which categories are rising or falling, which regular customers are likely to stop buying (with the model's measured accuracy) and which days were far from usual. Built for industrial supply stores in Saudi Arabia, and read by StartAI and StartAI Radio.

What you get

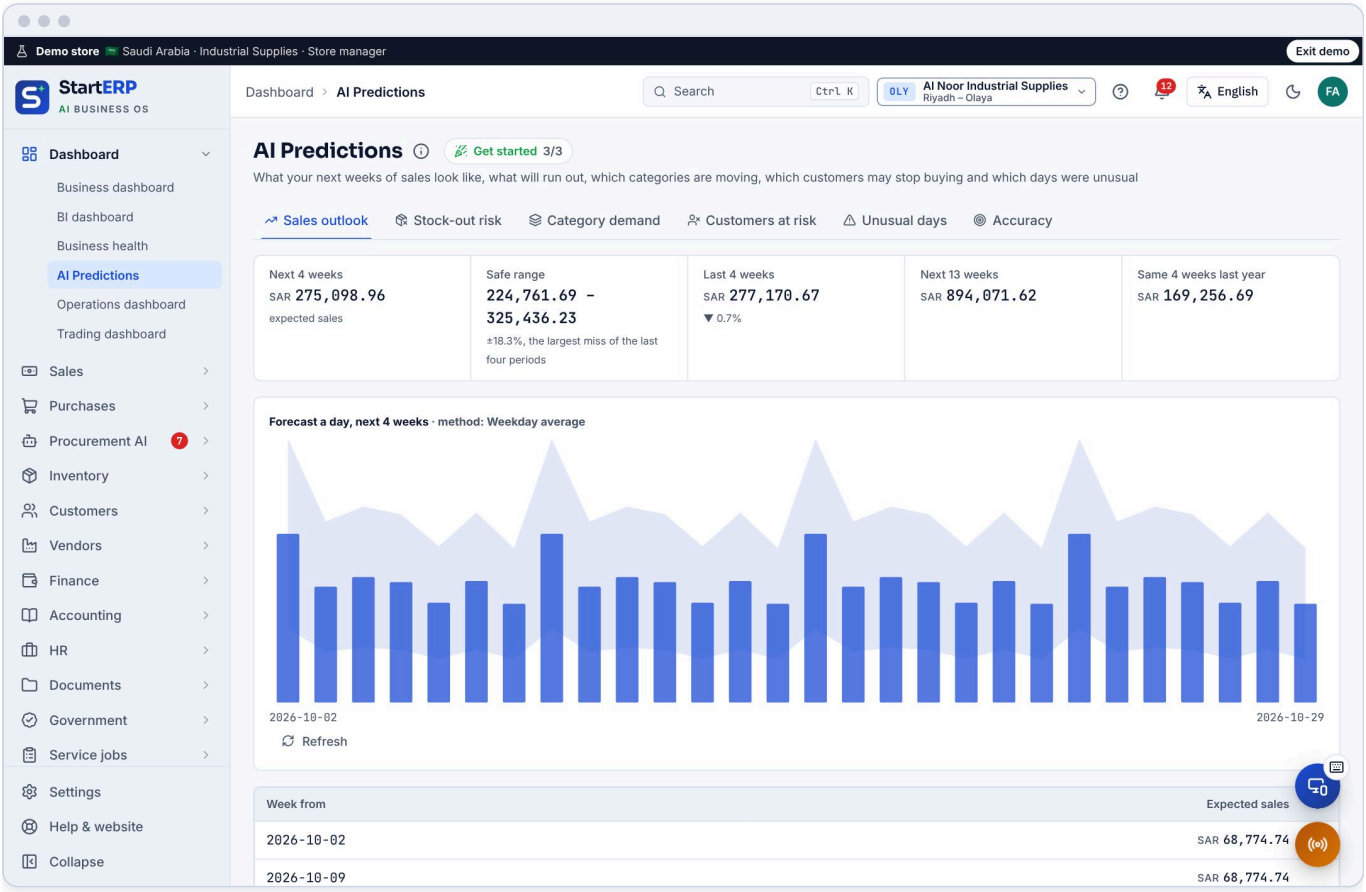
- Next 4 and 13 weeks of sales
- Stock-outs seen in advance
- Customers likely to leave
- Every forecast's error shown

GET STARTED IN 3 STEPS

1. **Keep selling as usual.** About two months of sales start it.
2. **Read the sales outlook.** Next 4 and 13 weeks, with a safe range.
3. **Order what will run out.** Stock-out risk with the quantity to order.

AI Predictions

See what is coming before it happens: the next 4 and 13 weeks of sales with a safe range, the products that will run out before an order can arrive and how much to order, which categories are rising or falling, the regular customers likely to stop buying and the days that looked unusual. Every forecast is tested on your own past sales first, and the method that was most accurate is used, with its error shown. Part of the AI Predictions add-on for industrial supply stores in Saudi Arabia.



AI Predictions · demo store: Industrial Supplies, Saudi Arabia

1. Open Dashboard → AI Predictions. Sales outlook shows the next 4 weeks' expected sales, the safe range, the change against the last 4 weeks and a bar a day; the 13-week total is beside it.
2. Stock-out risk lists the products out of stock or that run out before an order can arrive first, then the ones to order now, with the quantity to order up to the safe stock (rounded up to the reorder rule's pack size).
3. Category demand shows each category's expected units for the next 4 weeks and how it moved against the 12 weeks before. Customers at risk lists regular customers by their chance of not buying in the next 90 days, with when they last bought and their usual gap.
4. Unusual days lists the days of the last 90 that were much higher or lower than the usual for that weekday. Accuracy shows each method's error on your last four periods and which one is used.

Tips. Four methods compete: weekday average, same weekday, trend and level, and same weeks last year. Each one forecasts your last four periods as if they had not happened yet; the one with the smallest error wins, and the safe range is its largest miss. Once a week a machine-learning run (Chronos-2, LightGBM and statistical models) forecasts the same four periods. Its forecast is used only when its error is smaller than the best of the four methods; the Accuracy tab says which one is used and when it last ran. Single products sell in lumps, so the stock check uses a safe level (enough for 9 of 10 past periods of the lead time) rather than a guess of the exact quantity. Large one-off project orders are shown apart and do not inflate the everyday forecast. The customer model is learnt from your own customers' history and its AUC is shown (1 is perfect, 0.5 is a guess). Predictions start after about two months of sales and refresh every few hours.

04

StartAI daily brief

Add-on module

Your business, briefed every morning

StartAI reads yesterday for you and sends the owner a short brief by email, WhatsApp and in the app: sales against the same day last week, what customers owe, the products to reorder, the customers to remind and any invoice with a large discount or a line sold below cost. Each item waits for a yes or no: say yes and the purchase order opens filled in, or WhatsApp opens with a polite reminder to the customer.

What you get

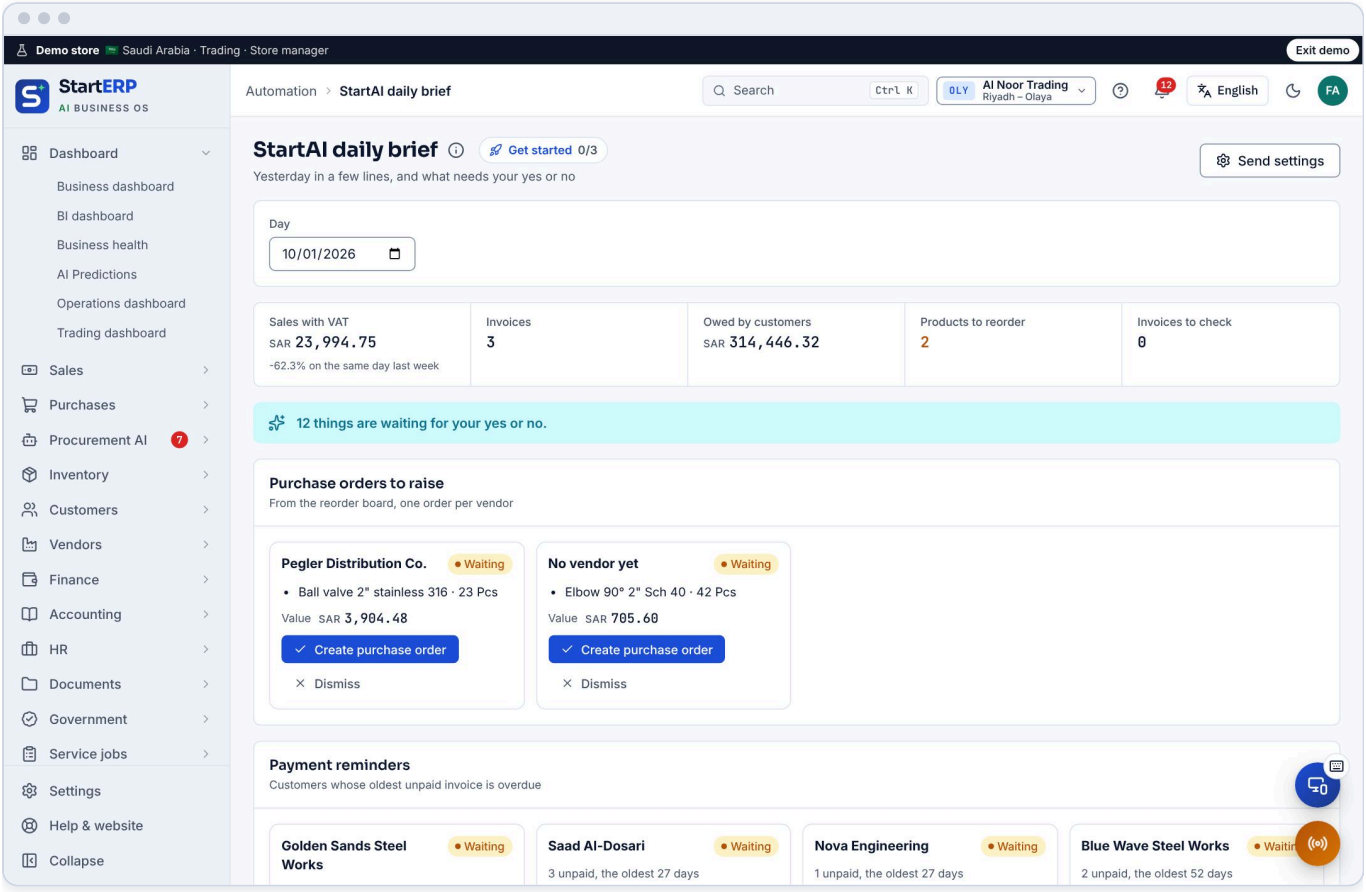
- Yesterday in a few lines
- Purchase orders ready to approve
- Payment reminders in one tap
- Large discounts and below-cost sales flagged

GET STARTED IN 3 STEPS

1. **Choose where it comes.** Email, WhatsApp or in the app, and the time.
2. **Read the first brief.** Sales, dues, reorders and alerts.
3. **Say yes or no.** Orders and reminders open ready to send.

StartAI daily brief

Yesterday in a few lines and what needs your yes or no: sales with VAT against the same day last week, what customers owe, the products to reorder (one purchase order per vendor), the customers to remind about unpaid invoices, and the invoices with a large discount or a line sold below cost. It is sent every morning by email, as a notification and on WhatsApp. Part of the StartAI daily brief add-on.



StartAI daily brief

1. Open Automation → StartAI daily brief. It shows yesterday; pick another day to see its brief.
2. Under Purchase orders to raise, press Create purchase order: a new purchase order opens with the vendor's products and quantities. Check it and save it. Press Dismiss to skip it for the day.
3. Under Payment reminders, press Remind on WhatsApp: WhatsApp opens with a polite message listing the unpaid invoices. Under Invoices to check, open the invoice, then press Checked or Looks fine.
4. Press Send settings to switch the morning brief on, set the time, the language, the email addresses and WhatsApp numbers, the discount that gets flagged and after how many days a customer is reminded.

Tips. With nobody chosen in Send settings the brief goes to the store's admins. Email needs Outgoing mail (SMTP) in Settings › Email. Products to reorder come from the Reorder suggestions board when the store has that add-on. A discount of 20% or more of the lines is flagged unless you set another limit; customers are reminded once their oldest unpaid invoice is 15 days old. Ask StartAI "what needs my attention today?" and it reads the same brief.

05

StartAI Radio

Add-on module

Your store's news, on air all day

A radio button sits beside StartAI's on every screen. Switch it on and StartAI reads the store's business news aloud as it happens, with the words shown as captions: the hour's sales against the same day last week, a large sale, today's best seller, a product that just ran out, a payment received, the till opened or closed, and in the afternoon what customers owe, the bills due, the day's returns and expenses and the week so far. Choose how much it says: a live station, an hourly round-up or breaking news only. Cashiers and shared screens hear no amounts and no names unless you say so, quiet hours keep it silent when you wish, and every day's bulletins are kept for 30 days to read back or replay. Ask StartAI for any day's news too.

What you get

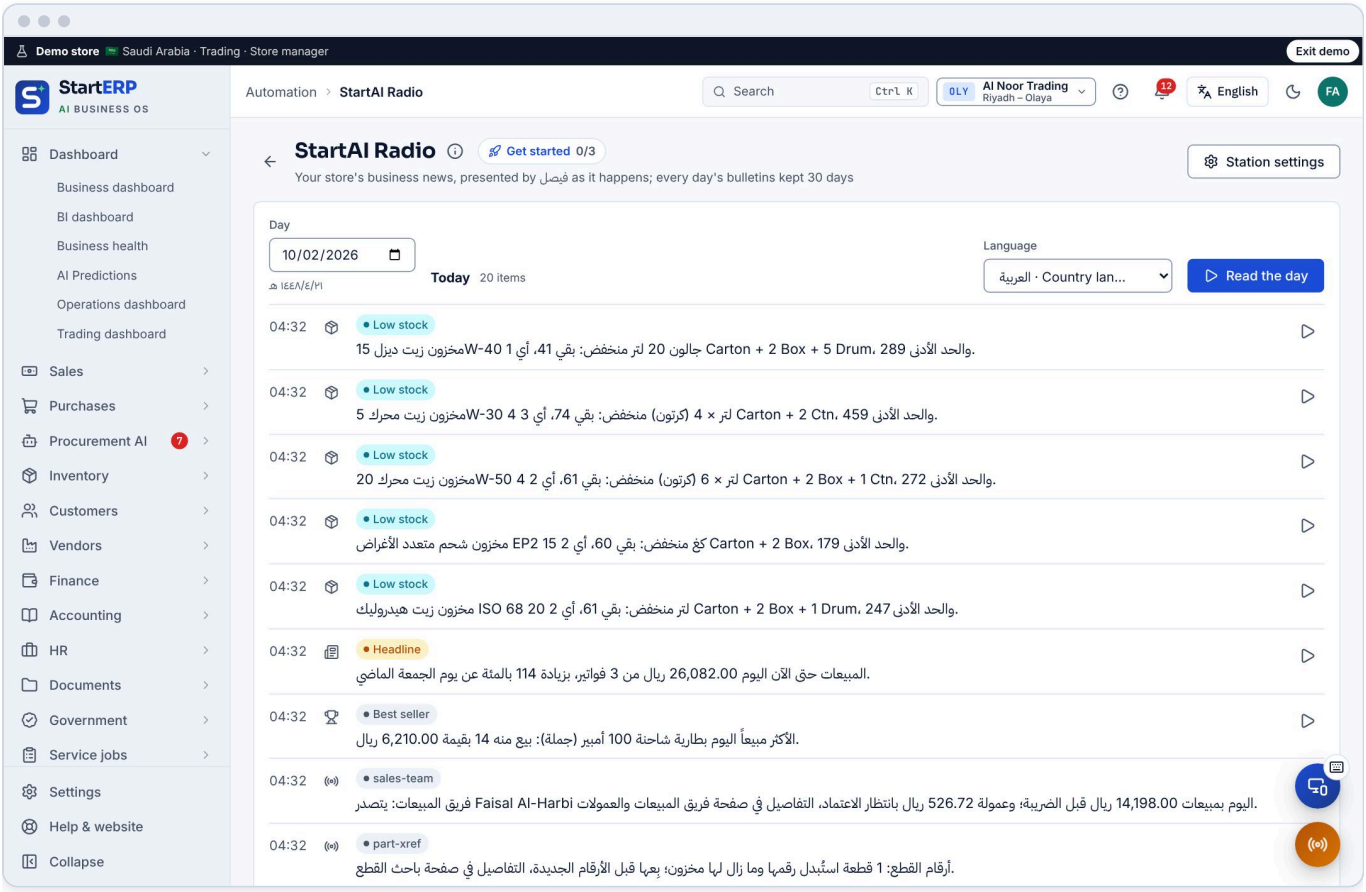
- The day's figures as news, read aloud
- Live, hourly or breaking news only
- No amounts or names on shared screens
- 30 days of bulletins to read back

GET STARTED IN 3 STEPS

1. **Press the radio button.** Beside StartAI's; press play and listen.
2. **Set quiet hours and speaker-safe.** Who hears amounts, and when it stays silent.
3. **Read back any day.** Every bulletin of 30 days, replayable.

StartAI Radio

The store's business news read aloud as it happens, with captions: the hour's sales against the same day last week, a large sale, today's best seller, a product that ran out, a payment received, the till opened or closed, and in the afternoon what customers owe, the bills due, returns, expenses, this month's VAT so far and the week so far; from 9 in the morning, stores with the Business Advisor add-on also hear today's business advice under one headline. A radio button sits beside StartAI's on every screen; this page keeps every day's bulletins for 30 days and holds the station's settings. Part of the StartAI Radio add-on.



StartAI Radio

1. The presenter goes by a first name that fits the radio's language and your store's country, shown under the radio's title and said on air now and then. In English it takes the country's name: Faisal in Saudi Arabia, Saeed in the UAE, Arjun in India, James in the UK, and so on. In Malayalam it is a Kerala name, Arun (Urdu: Bilal, Bangla: Arif, French: Louis, Arabic: Faisal, unless your country already speaks that language and has its own). StartAI's chat assistant has a name of their own, such as Noura in Saudi Arabia.
2. Each name matches its voice: StartAI has a woman's name and speaks with a woman's voice, and StartAI Radio's presenter has a man's name and speaks with a man's voice. With the browser's own voice, a voice of the same kind is chosen when the device has one.

3. Press the radio button at the corner of any screen (above StartAI's), then Play or the On/Off switch in the window. The presenter, a man's Gemini Live voice (StartAI's Talk speaks with a woman's), presents the news like a business analyst, with captions; when the news is quiet it recaps where the day stands, so it keeps going while you work. Pause stops it, the arrows skip a segment, and Replay today's news from the start says every bulletin of the day again, oldest first; breaking news interrupts the replay and it goes on afterwards.
4. Choose how much it says in the player: Live station says everything, Hourly the headlines and breaking news, Breaking news only just the urgent items. The presenter speaks your country's official language from the start (Arabic in the Gulf, Hungarian in Hungary, German in Germany; English in India and where the voice does not speak the language). Choose another under Language: English, Malayalam, French, Urdu, Bangla or one of about 40 more. Your pick is kept for you on this device and StartAI's Talk speaks it too; pick the first entry to go back to the country's language.
5. Open Automation → StartAI Radio to read any day's bulletins (kept 30 days). Pick the day and the language; Replay has the presenter say one item again and Read the day presents the whole day as one segment, with captions.
6. Press Station settings to switch the station off for the whole store, choose who hears amounts and names, set quiet hours (for example 22:00 to 08:00) and pick the presenter's voice: automatic (the store's Google connection, else StartAI's free Gemini Live), one of the store's Gemini Live voices, or the browser's own voice.

Tips. Cashiers and other roles without a finance view hear speaker-safe news: no amounts and no customer names, so a shop floor speaker gives nothing away. Everyone hears only the areas their role may open. Every reading, on air or a replay, is the presenter's: the Talk voice presenting like a business analyst in the chosen language. Without Google connected the browser's own voice reads the facts; a browser without one shows the captions only. With several tabs open, one tab speaks. Ask StartAI "what was the news yesterday?" and it reads the same bulletins.

06

AI document reading

Add-on module

Passports, IDs and licences read for you, checked before you use them

Take a photo of a passport, a national ID or residence card, or a company's registration or licence, and Claude reads every detail in seconds: the number, the names in English and Arabic, the dates, the nationality and the machine-readable lines. Each value is checked before you rely on it: the passport's check digits, the ID number's own check, an expiry that has passed or is close, and anything Claude was unsure of is marked for you to compare. Then use it in one step: file the paper in Documents with its number and dates so its renewal is followed, put a new joiner's ID on their employee record, or add a walk-in customer from their passport. Your own Claude API key is used, every reading's cost is shown, and a monthly limit you set stops readings before the bill surprises you.

What you get

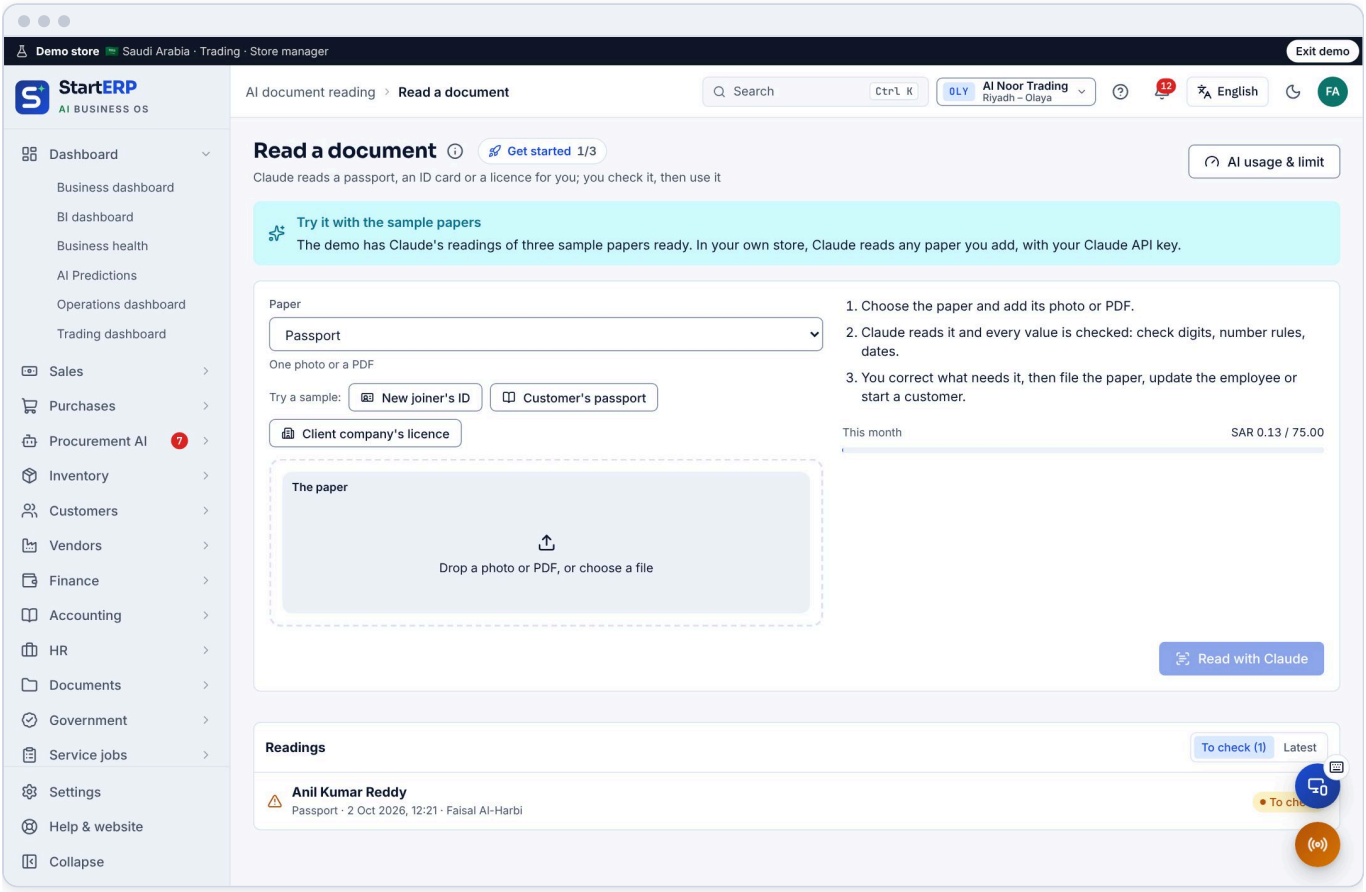
- Passports, IDs, residence cards, CRs and licences of your country
- Check digits, expiry and unsure fields flagged before you confirm
- Filed in Documents, onto the employee or as a new customer in one step
- Your own Claude key, each reading's cost and a monthly limit

GET STARTED IN 3 STEPS

1. **Add your AI key.** And set a monthly limit.
2. **Read a document.** Take a photo of a passport, ID or licence.
3. **Use it in one step.** File it or create the employee or customer.

Read a document with AI

Add a photo or a PDF of a passport, a national ID or residence card, or a company's registration or licence, and Claude reads its details for you. Each value is checked (the machine-readable lines, the ID number's check digit, the dates) and anything Claude was unsure of is marked. You correct what differs from the paper, then confirm: file the paper in Documents, update the employee's record or add a new customer from it. Part of the AI document reading add-on.



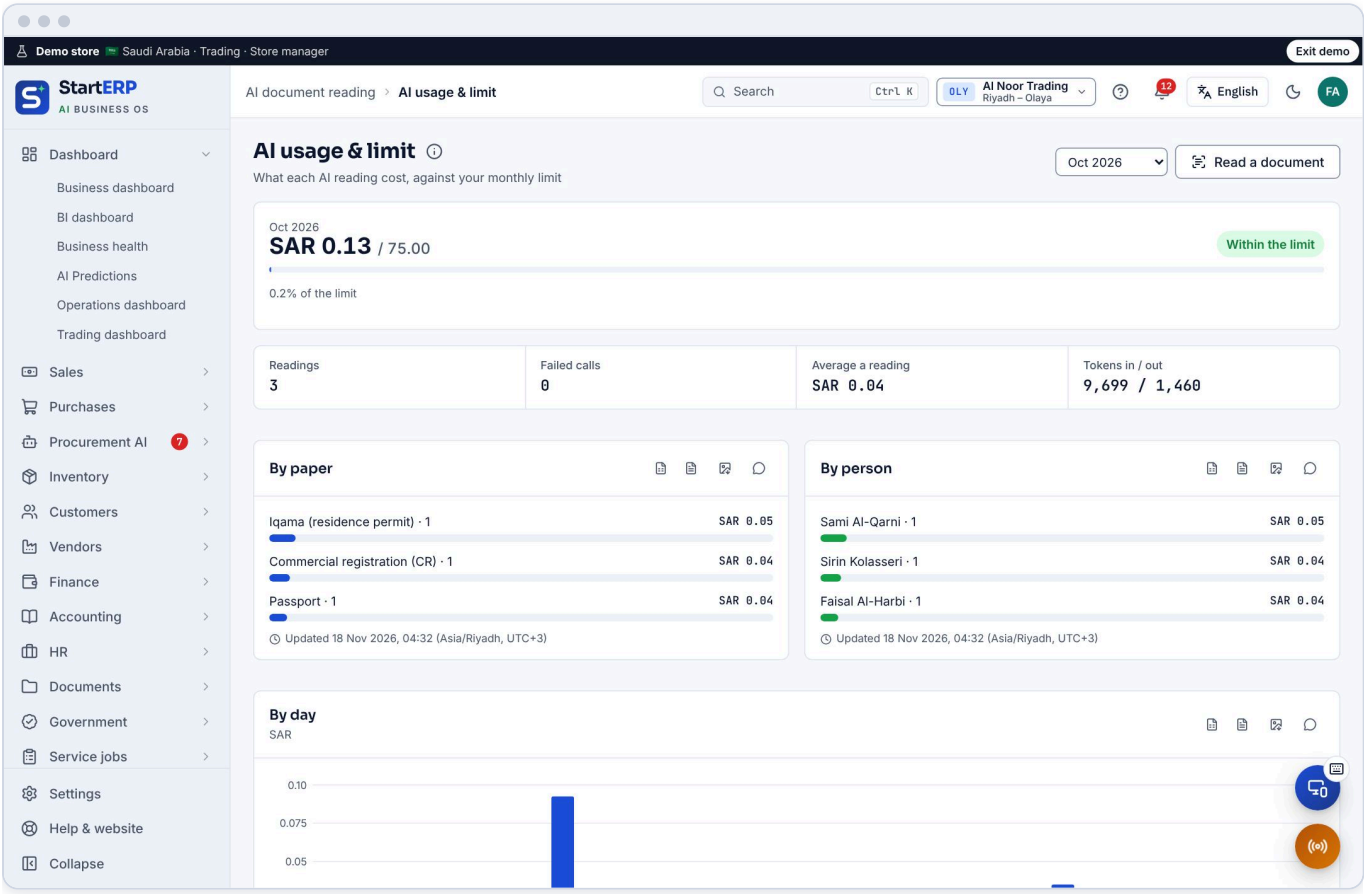
Read a document with AI

1. Open AI document reading → Read a document. Choose the paper: a card needs its front and its back.
2. Drop a photo or a PDF on the box, or press it to choose a file (on a phone, take the photo), then press Read with Claude.
3. Look at the checks, then compare the details with the paper. A field Claude was unsure of is shaded: correct anything that differs.
4. Under Use it, choose whose paper it is: an employee, a customer (or a new customer from this paper), a vendor or this business. Tick File the paper in Documents, and Update the employee's record when the new number or dates should go on it.
5. Press Confirm. The links underneath open the filed paper, the employee or the customer. Press Discard instead for a paper you do not need.

Tips. Readings shows what is still to be checked; Latest shows the confirmed and discarded ones too. A reading waits there until someone confirms or discards it. Copy the details puts every value on the clipboard, for a government portal or an email. Each reading costs a few cents of Claude's charges, shown on the reading; readings stop for the month when the store's limit is reached. In the demo, try the three sample papers: a new joiner's ID, a customer's passport and a client company's licence.

AI usage & limit

What the store's AI readings cost each month against its monthly limit: the readings and the failed calls, the average cost of a reading, the cost by paper, by person and by day, and every call with its tokens. An admin sets the monthly limit, the Claude model and the store's Claude API key here. Part of the AI document reading add-on.



AI usage & limit

1. Open AI document reading → AI usage & limit. Choose the month at the top.
2. The month's card shows what was spent against the limit; By paper, By person and By day show where it went, and Calls lists each call.
3. Under Limit and Claude, an admin sets the monthly limit in the store's currency and chooses the Claude model.
4. Paste the store's Claude API key (it starts with sk-ant-), press Check the key, then press Save.

Tips. Claude bills the key in US dollars; the amounts here are converted at the rate shown under the settings. When the limit is reached, readings stop until the next month or until an admin raises the limit; a call that fails is not charged. Checking the key costs nothing. The key is kept on the server and never shown again in full.

07

Automation & scheduled reports

Add-on module

Reminders and alerts that run by themselves

Set a rule once and StartERP does the follow-up: WhatsApp a customer 3, 7 and 14 days after an invoice falls due, follow up quotations with no answer, tell the team when a product reaches its minimum stock or a batch or an employee's Iqama is about to expire, and thank customers after a sale. Rules can send an in-app notification, an email, a WhatsApp message or a signed webhook. Quiet hours, a daily limit and a test run keep it safe, and the run log shows who got what. Scheduled reports send the owner's daily summary, sales, profit, VAT and more as PDF or Excel every day, week or month.

What you get

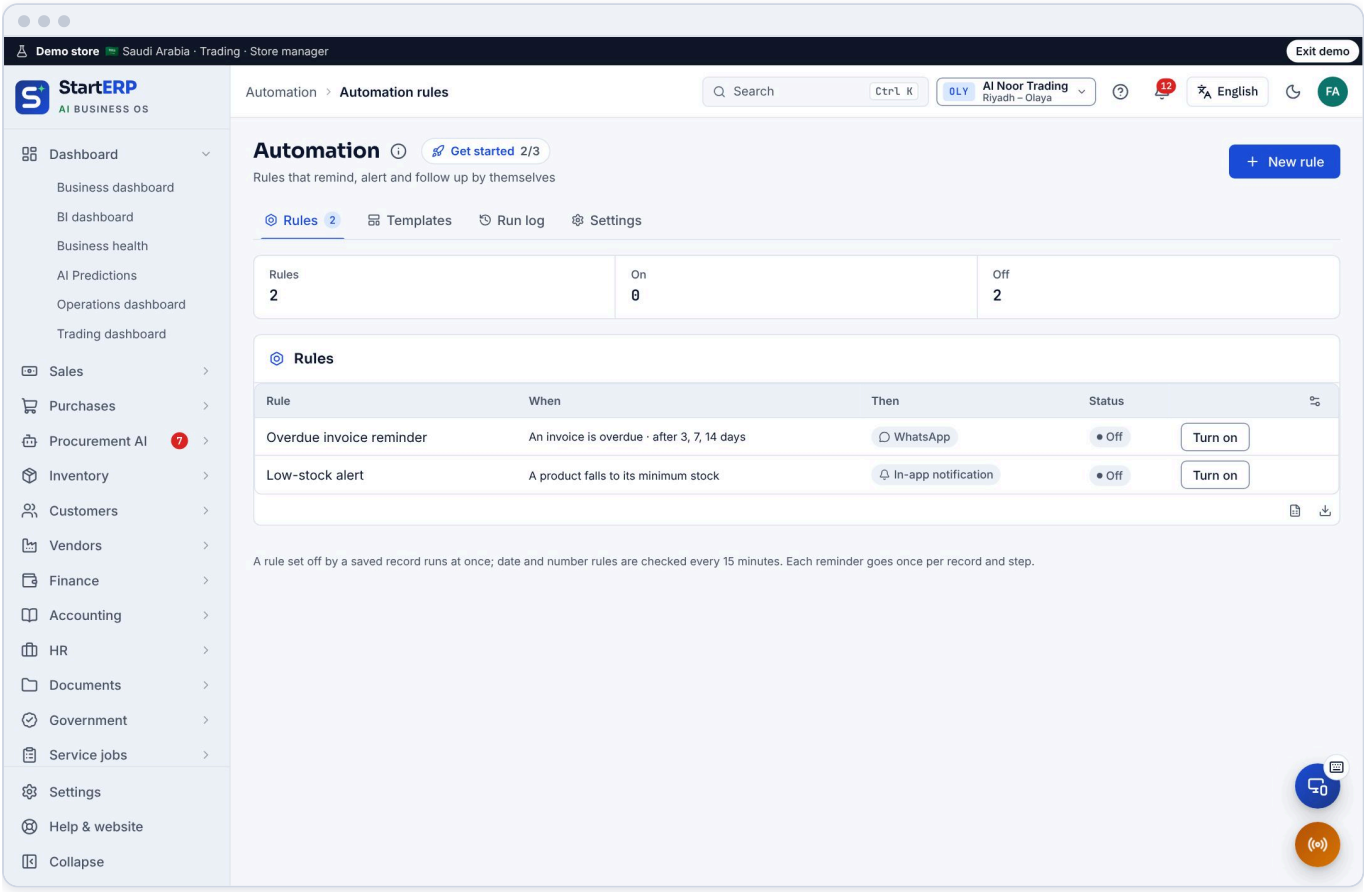
- Overdue invoices chased for you
- Six ready-made rules
- Quiet hours and a daily limit
- Owner's daily summary every morning

GET STARTED IN 3 STEPS

1. **Turn on a ready rule.** Such as payment reminders 3, 7 and 14 days late.
2. **Test it.** A test run shows who would get what.
3. **Schedule your daily report.** PDF or Excel by email.

Automation rules

Rules that work by themselves: when something happens (a sale, quotation, purchase or lead is made; a lead or service job reaches a stage), a day comes (an invoice is overdue, a quotation has no answer, a batch or an employee's ID is about to expire) or a number crosses a line (low stock, yesterday's sales below a target), the rule sends an in-app notification, an email, a WhatsApp message or a webhook. Part of the Automation add-on.



Automation rules

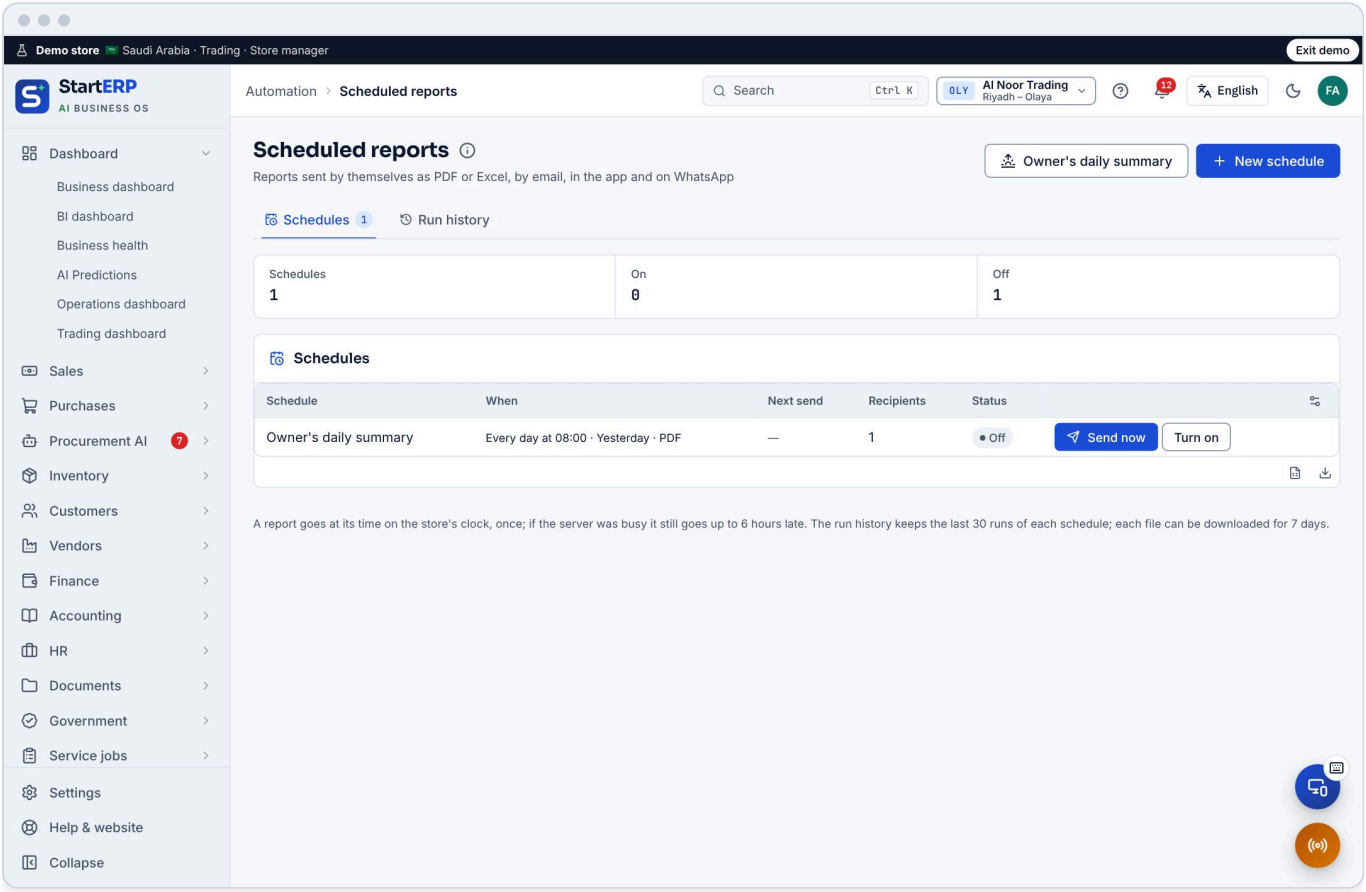
1. Open Automation → Automation rules. The Templates tab has six ready-made rules: overdue invoice reminder, quotation follow-up, low-stock alert, batch expiry, Iqama / visa expiry and thank-you after a sale. Press Use this template, or New rule to start from nothing.
2. Step 1, When: pick what starts the rule. For a reminder, type the days, e.g. 3, 7, 14 after an invoice falls due; each goes once per invoice. An invoice falls due the number of days you set after its date.
3. Step 2, If (optional): add conditions, e.g. Amount is more than 500, or Customer group is VIP.
4. Step 3, Then: add actions. A message can use {name}, {code}, {amount}, {balance}, {date}, {days}, {expiry}, {item}, {stock}, {min}, {status} and {store}. WhatsApp goes through your WhatsApp Business API with an approved template; without one, each message is a ready Send on WhatsApp link in the run log. Emails go from the store's own mail account.

5. Press Test run to see who would get what now, without sending anything. Tick On and Save to start the rule.
6. The Run log tab lists every run: the record, when, and who got what. Settings sets the daily limit of messages to customers and the quiet hours.

Tips. A rule set off by a saved record runs at once; reminders and stock or sales checks run every 15 minutes. In the quiet hours (21:00 to 09:00 unless you change them) messages to customers wait and go when they end; alerts to your team go at once. A webhook is a POST of the record as JSON, signed with your secret in X-StartERP-Signature (sha256 HMAC).

Scheduled reports

Get a report by itself every day, week or month as a PDF or an Excel file: the owner's daily summary (yesterday's sales, payments received, expenses, net profit, top items and low stock), sales, top-selling products, profit, expenses, VAT, customers who owe, low stock or the trial balance. It goes to your users by email and as a notification in the app, to any email address and to WhatsApp numbers. Part of the Automation add-on.



Scheduled reports

1. Open Automation → Scheduled reports and press Owner's daily summary: it is ready to send yesterday's figures at 08:00 to you. Or press New schedule and pick any report.

2. What: pick the report, the period it covers (yesterday, the last 7 days, last month…), PDF or Excel, and English or Arabic. Customers who owe, low stock and the trial balance are as they stand when sent.
3. When: every day, every week on a day, or every month on a day (31 means the last day of each month), at a time on the store's clock. The form shows the next send.
4. Who gets it: add users (an email with the file and a notification in the app), email addresses (the file is attached) and WhatsApp numbers (a message with the file's link). Up to 20 recipients. The users list holds the store's users and its administrators; any of them can be picked.
5. Send a test: at the bottom of the form, type an email address and/or a WhatsApp number and press Send test now. The report goes at once, as the form is set, only to them: the schedule's own recipients get nothing and nothing is saved. The run history marks it Test.
6. Tick On and Save. Press Send now on a schedule to send it at once and check what it looks like.
7. The Run history tab lists every send: the period, who got what and the file to download. Each schedule keeps its last 30 runs; a file can be downloaded for 7 days (it is also attached to the email).

Tips. The figures are the same as on the dashboard and report screens for the same days, because the report is made from them. Orders count every sales invoice, as the Business dashboard's Total orders does, and the revenue, expenses and net profit are the dashboard's own figures. WhatsApp goes through your WhatsApp Business API when you name an approved template with 3 values (the report, the period, the link); without one, each message is a ready Send on WhatsApp link in the run history. Emails (scheduled sends, Send now and test sends) go from StartERP's own mail account, under the store's name, so no mail setup is needed in the store; only while StartERP's mail account is not set up does the store's own mail account (Settings → Email) stand in. The file's link works without signing in, so share it only with people who may see the figures.

08 Analytics & BI

Add-on module

See what sells, what earns and what to do next

Sales analytics and a BI dashboard break your numbers down by product, category, customer, salesperson, branch and hour, so you know where the money really comes from.

What you get

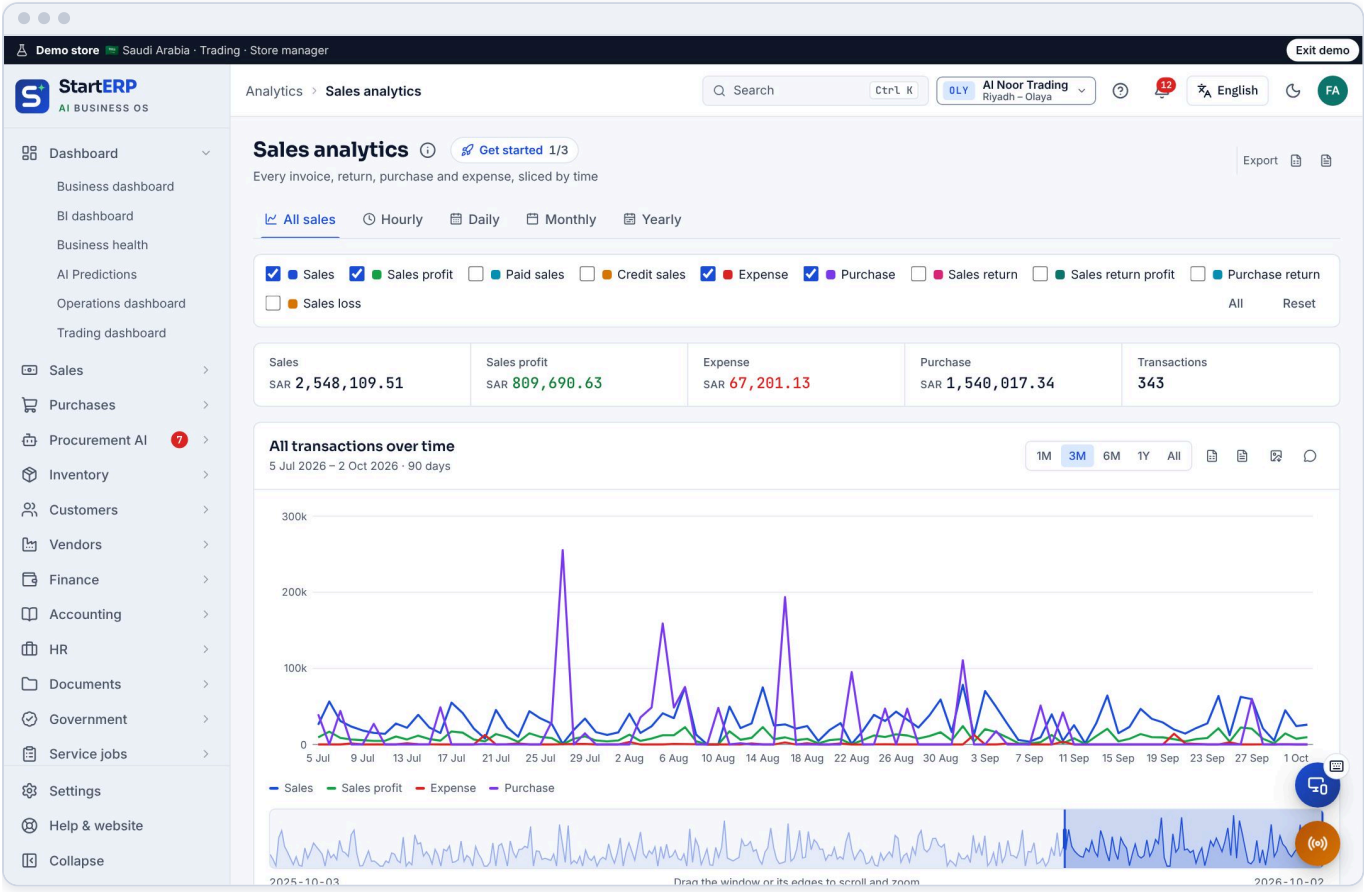
- Best and worst sellers, by profit not just sales
- Trends by day, hour, branch and salesperson
- BI dashboard with interactive charts
- Export any view to Excel

GET STARTED IN 3 STEPS

1. **Keep selling as usual.** Every sale feeds the analysis.
2. **Open sales analytics.** By product, category, customer and hour.
3. **Explore the BI dashboard.** Spot where the money comes from.

Sales analytics

Every invoice, return, purchase and expense sliced by time — all sales, hourly, daily, monthly and yearly — with selectable series and CSV export.



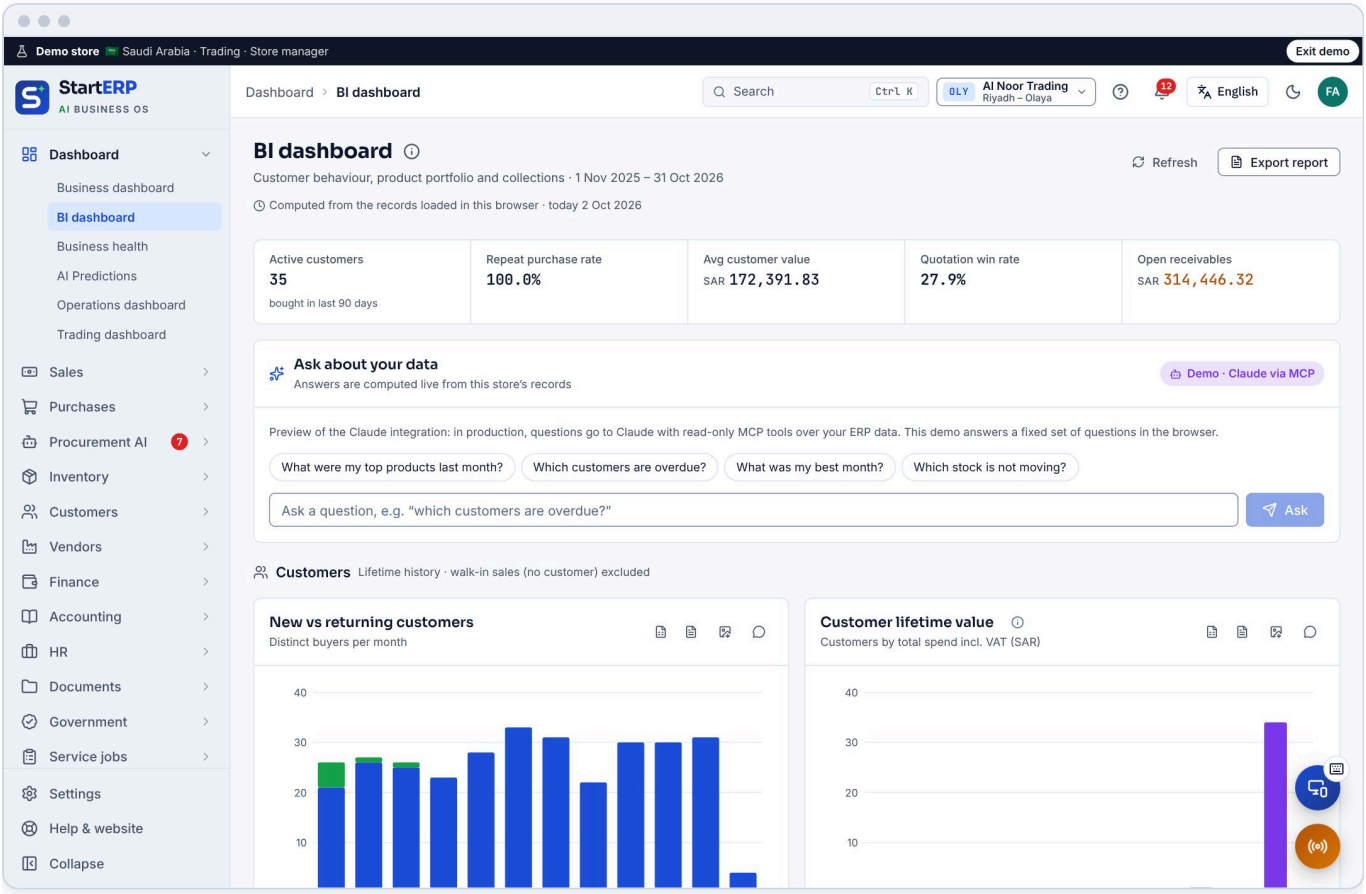
Sales analytics

1. Pick a view from the tabs: All sales, Hourly, Daily, Monthly or Yearly.
2. Tick the Series to plot (Sales, Sales profit, Paid sales, Credit sales, Expense, Purchase, returns, Sales loss); All selects every series.
3. In All sales, use the 1M / 3M / 6M / 1Y presets or drag the window under the chart (or its edges) to scroll and zoom.
4. Check Transactions in window to see the documents behind the chart for the selected range.
5. In Hourly, read the Day × hour heatmap (darker = higher value) to find your peak hour.
6. Click Export CSV on any table to download its rows.

Tips. If no series is ticked the chart is empty — tick at least one series above. Your series selection is remembered on this device. In Yearly, the current year is year-to-date, so compare it carefully with full past years. Non-VAT sales and returns are included next to VAT invoices, each labelled by type in the transactions table.

BI dashboard

Deeper analysis of the last 12 months (or the period set in Store settings → BI dashboard): customer behaviour, product portfolio, invoice aging, quotation conversion and a full PDF report. To ask questions about your data, press Ask StartAI at the bottom corner.



BI dashboard

1. On your own store, ask about your data with StartAI, the floating button on every screen (see AI assistant chat). A demo store shows an "Ask about your data" box here that answers a few questions in the browser.
2. In Customers, review New vs returning customers, Customer lifetime value, Churn risk and Cohort retention.
3. Click a Churn risk tier (High, Medium, Low · view list) to see exactly which customers fall in it.
4. In Products, click a cell of the ABC–XYZ matrix to list its products, and check Product sales trends and Return rate by product.
5. In Collections & pipeline, read Invoice aging (0–30, 31–60, 61–90, 90+ days) and the Quotation win rate.
6. Click Export report for a print-ready report of every chart with its key figures and data tables: Print / Save as PDF, or CSV of all tables.

7. Click ⓘ on any chart to open the breakdown table, then export it as CSV, Print / PDF or send it by WhatsApp.

Tips. Figures come from the store's whole history, with today and months in the store's time zone. Refresh asks for the latest figures; they also refresh on their own while the page is open (Store settings → BI dashboard sets how often, the period and the thresholds). Walk-in sales (no customer, or the counter's cash / walk-in customer) are excluded from customer analysis, so lifetime value and churn reflect named customers only. The Ask box is a demo of the Claude (MCP) integration and answers a fixed set of questions; other questions get a hint to try the suggestions. Quotation win rate = quotations invoiced ÷ all quotations in the period; a quotation counts as won once a sales invoice is made from it. Cancelled and deleted quotations are not counted.

09

Document management

Add-on module

Every company and staff paper, filed and never expired by surprise

File commercial registrations, licences, iqamas, passports, contracts and insurance with their scans, and get reminders 90, 30 and 7 days before each one expires. Every view and download is logged.

What you get

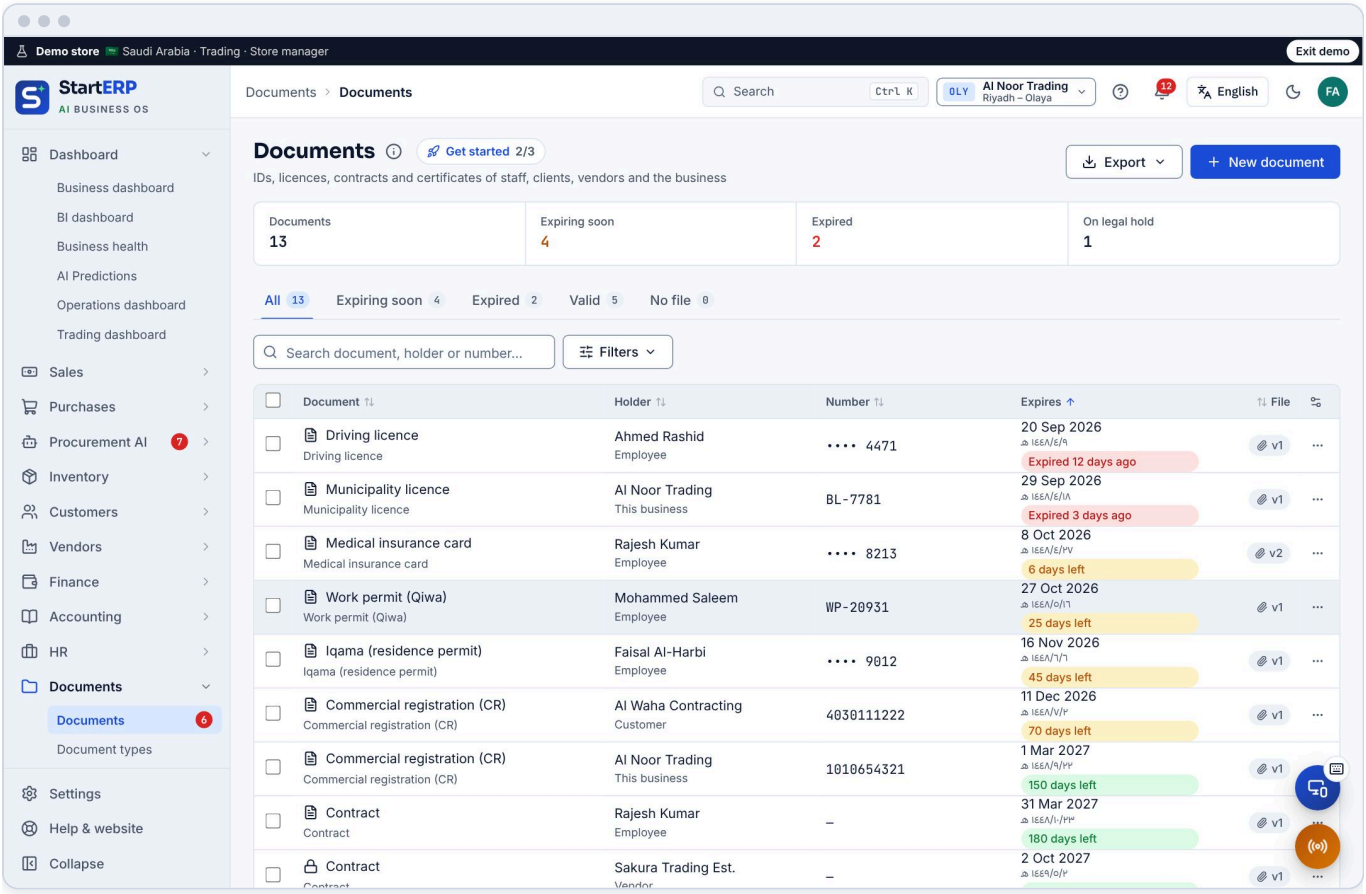
- Papers of the business, each employee and each vehicle in one place
- Expiry reminders in the app, 90, 30 and 7 days ahead
- Versions kept when a paper is renewed
- Legal hold and an audit trail of who saw what

GET STARTED IN 3 STEPS

1. **Pick document types.** Licences, IDs, contracts, insurance.
2. **Upload a document.** The scan with its number and expiry.
3. **Watch the reminders.** Alerts 90, 30 and 7 days before expiry.

Documents

File the papers of your employees, customers, vendors and the business itself (iqama, passport, licences, contracts, the CR and VAT certificate) with their expiry dates. Every version of the scan is kept, and the store is warned before anything expires. Part of the Document management add-on.



Documents

ON THE LIST

1. Open Documents. Each row shows the paper, who it belongs to, its number and an expiry badge: green while valid, amber within the reminder window, red once expired.
2. Use the Expiring, Expired, Valid and No file tabs to work through what needs attention; the sidebar badge counts the expiring and expired papers.
3. Filter by Holder (employee, customer, vendor or this business) and by Type, or search a name, number or title.
4. Press "New document" to file a paper with its scan in one go.

Tips. Sensitive numbers (passport, iqama, national ID) are masked in the list and shown in full on the document itself. Reminders are raised by the server 90, 60, 30 and 7 days before expiry (per type, under Document types) and again when a paper expires; they appear under the bell.

ON THE FORM

1. Choose the Document type. The form adapts: the number label ("Iqama no.", "CR no.") and whether an expiry date is required follow the type.
2. Pick who it belongs to: an employee, customer or vendor (search by name, code or phone) or "This business" for the company's own papers.
3. Enter the number, the issue date and the expiry date. A title is optional; the type's name is used when it is empty.
4. Press "Choose file" and pick the scan (PDF, JPG, PNG or WEBP up to 20 MB), then Save document: the paper is filed and the scan becomes version 1.

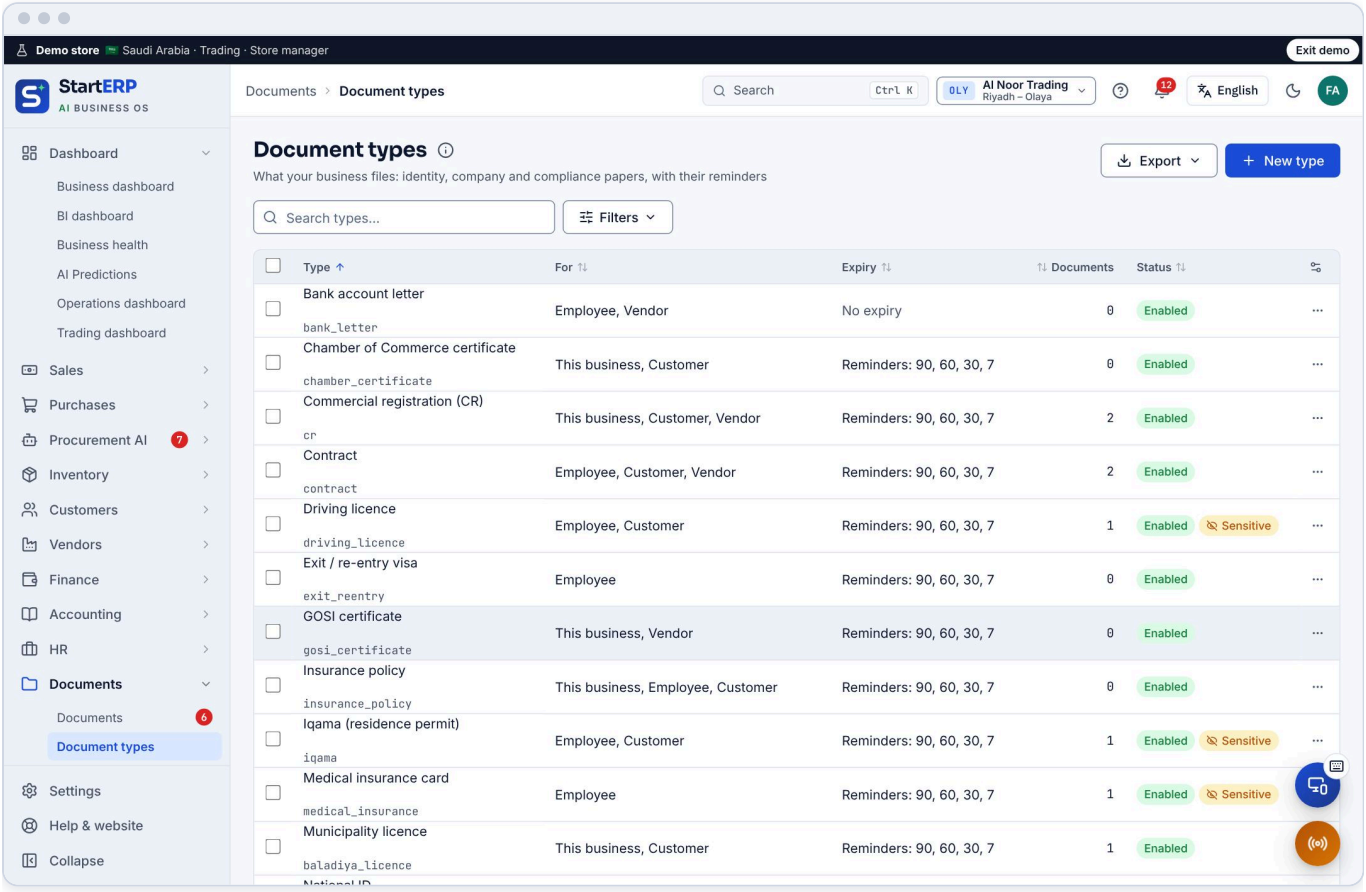
ON THE RECORD

1. The header shows the expiry badge and whether the number is sensitive; Details lists the holder (click it to open the record), the number, the dates, the type's reminders and the alerts already sent.
2. Open Versions: every uploaded scan with its size and who uploaded it. "View" opens it in the app; "Download" saves it. Both are recorded in the audit log.
3. After a renewal, press "Upload new version" and pick the new scan: it becomes the current version and the older ones stay.
4. Use "Legal hold" when a paper must be kept (a dispute, an audit): Delete stays disabled until the hold is lifted.

> **Tips.** Deleting a document keeps its versions on the server for the type's retention period; it is not wiped straight away.

Document types

The kinds of paper a store files: who they are for, whether they expire, how many days before expiry to remind, and how long to keep them. A store starts with the types of its country and business category (Iqama and CR in Saudi Arabia, Emirates ID and trade licence in the UAE, FSSAI for Indian food businesses...) and can add its own.



Document types

ON THE LIST

1. Open Documents → Document types. Each row shows the type, who it is filed for, whether it expires, its reminder days and how many documents use it.
2. Press "New type" for a paper the list does not have.
3. Open a seeded type to change its reminder days or retention; its name and key stay so the filed documents keep matching.

> **Tips.** Switch a type off (Enabled) instead of deleting it when documents still use it: it stops being offered on the form.

ON THE FORM

1. Enter the name in English and Arabic.

2. Pick who it is filed for (employee, customer, vendor, this business) and the label of its number ("Licence no.").
3. Tick "Has an expiry date" and set the reminder days (for example 90, 60, 30, 7) and the years to keep a document after it expires.
4. Tick "Sensitive" to mask the number in lists, then Save.

ON THE RECORD

1. The page shows the type's settings and how many documents are filed under it; Edit changes the reminders, retention and labels.

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
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 (this guide)**
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.

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