StartERP
AI BUSINESS OS

MODULE GUIDE 9 OF 14

# Online, integrations and control

Your website and online shop, your own brand and domain, online store sync, the API, custom roles and permissions and banking-style secure access. Step-by-step instructions for each of the 8 modules, with the real screens you will use.

Website & web access | Online shop (e-commerce) | White-label branding & domain | Salla store sync | Zid store sync | API access & sandbox | RBAC: custom roles & permissions | Secure access

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02 Online shop (e-commerce)
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05 Zid store sync
06 API access & sandbox
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08 Secure access

## 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 |
|---|---|
| **Website & web access** Add-on | A ready website of up to 10 pages in English and Arabic, built from blocks (services from your catalogue, prices, FAQ, reviews, branches with map and WhatsApp, an enquiry form that lands in your CRM), published in one click with its own SEO, sitemap and analytics tag, plus copy-in buttons for staff sign-in and the client portal |
| **Online shop (e-commerce)** Add-on | Sell the products you tick online on your own website: a modern shop with search, categories, stock badges, a cart and a checkout in English and Arabic, for personal buyers and companies with their VAT number, CR and PO; delivery with your fee and a free-delivery threshold or collection at a branch, paid on delivery or at the counter; each order waits on the Online orders board until you accept it into a ZATCA-ready sales invoice |

| | |
|---|---|
| **White-label branding & domain**<br>Add-on | Your own name, logo, colour and browser icon on the app, the sign-in page and the client portal, for this store and the branches you pick, with the StartERP name hidden; open it all on your own web address, proven by a DNS record and secured with its own certificate |
| **Salla store sync**<br>Add-on | Connect your Salla shop once: every paid online order arrives as a sales invoice, ZATCA reported like the rest, with the customer found by phone or added, the items matched by SKU or barcode, and the money kept in a Salla payouts account until Salla pays you; a log shows each order and anything to check, and the shop's quantities can follow your stock |
| **Zid store sync**<br>Add-on | Connect your Zid shop once: every paid online order arrives as a sales invoice, ZATCA reported like the rest, with the customer found by phone or added, the items matched by SKU or barcode, and the money kept in a Zid payouts account until Zid pays you; a cancelled or refunded order gets its sales return by itself |
| **API access & sandbox**<br>Add-on | Connect your own software, accounting tools and partners to the store: API clients with their own keys and permissions per area (read or change), an IP allow-list and a rate limit, short-lived OAuth2 tokens, a request log, a sandbox store with sample data you can reset any time, and a developer page with the full OpenAPI description and a Postman collection; no fee per call |
| **RBAC: custom roles & permissions**<br>Add-on | Your own roles, with exactly the screens and actions each team needs |
| **Secure access**<br>Add-on | Open your store only to your own staff, like a bank: office network, approved devices, working hours, idle sign-out, strict 2-step and Google or Microsoft company sign-in |

01

# Website & web access

Add-on module

## Your own website with online booking, in English and Arabic, published in one click

Press Create my site and you get a home page, services, about and contact pages written for your kind of business, in English and Arabic, in one of ten designs made for your trade. Change any text by clicking and typing, drag blocks into place, take back a change with Undo, or let StartAI write a heading or a paragraph. Add services straight from your catalogue, prices, frequently asked questions, reviews and your branches with a map and a WhatsApp button. Salons, clinics, gyms and spas take bookings on the site: the customer picks a service, a person and a free time, and the booking lands in your appointment book. Every page carries its own search title, description and sharing picture, and Google gets your type of business, your address, the sitemap and your analytics tag. Each publish is kept as a version you can put back live in one click, and This week shows the visits, enquiries and bookings the site brought.

### What you get

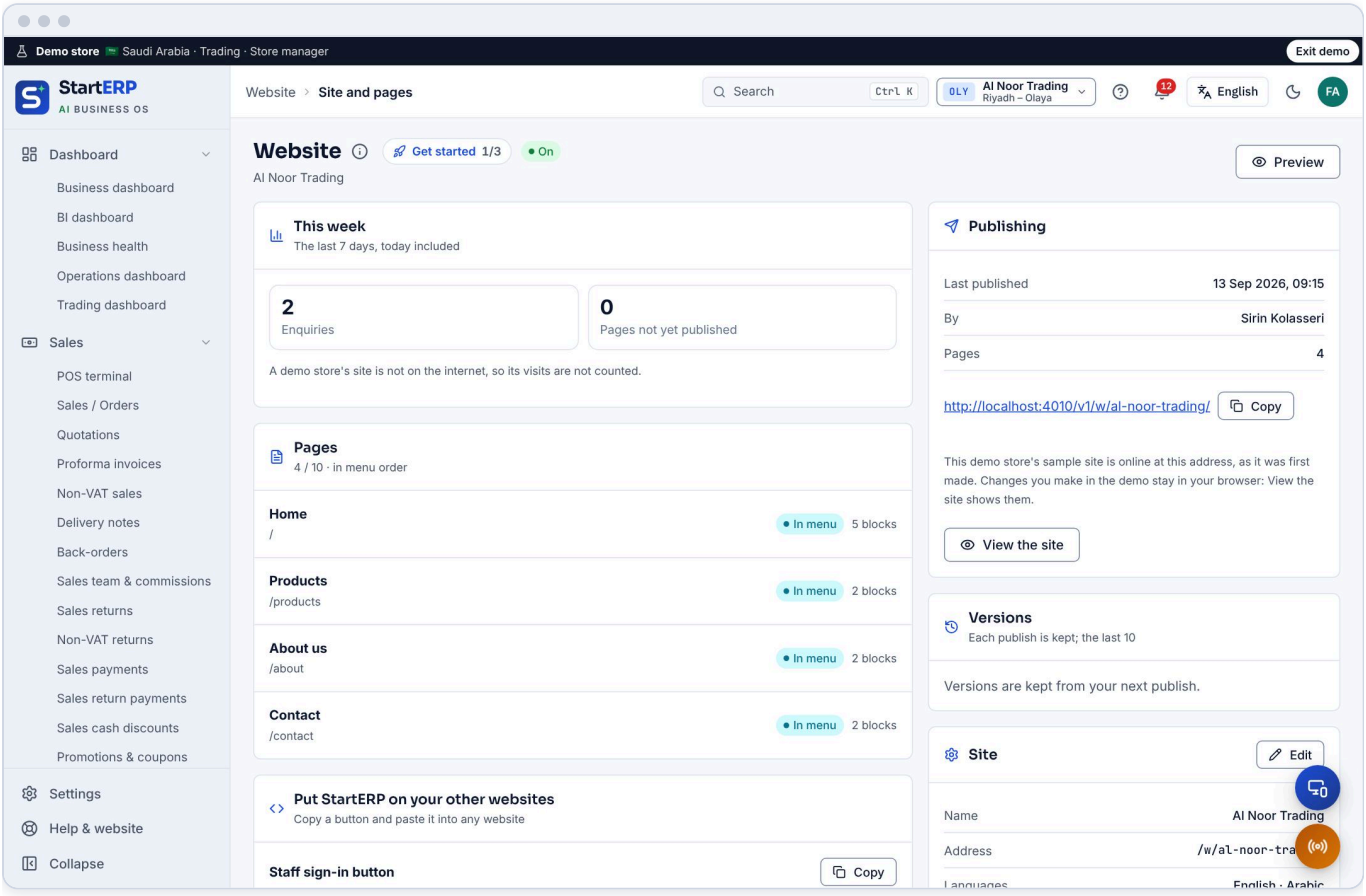
- Ten designs made for your trade, in English and Arabic, edited by click, drag and Undo
- Online booking for salons, clinics, gyms and spas, straight into your appointment book
- Every publish kept as a version and back live in one click; StartAI writes headings and text
- Google sees your type of business and address; enquiries reach your CRM; visits and bookings each week

### GET STARTED IN 3 STEPS

1. **Press Create my site.** Pages are written for your business.
2. **Edit text and add blocks.** Click any text to change it.
3. **Publish.** Your site goes live with its sitemap.

## Site and pages

Your own website of up to 10 pages in English and Arabic, built from your StartERP data: your services and prices, your branches with map and WhatsApp, and an enquiry form whose messages arrive in the CRM as leads. Create it in one click, change any text, then Publish. Part of the Website add-on.



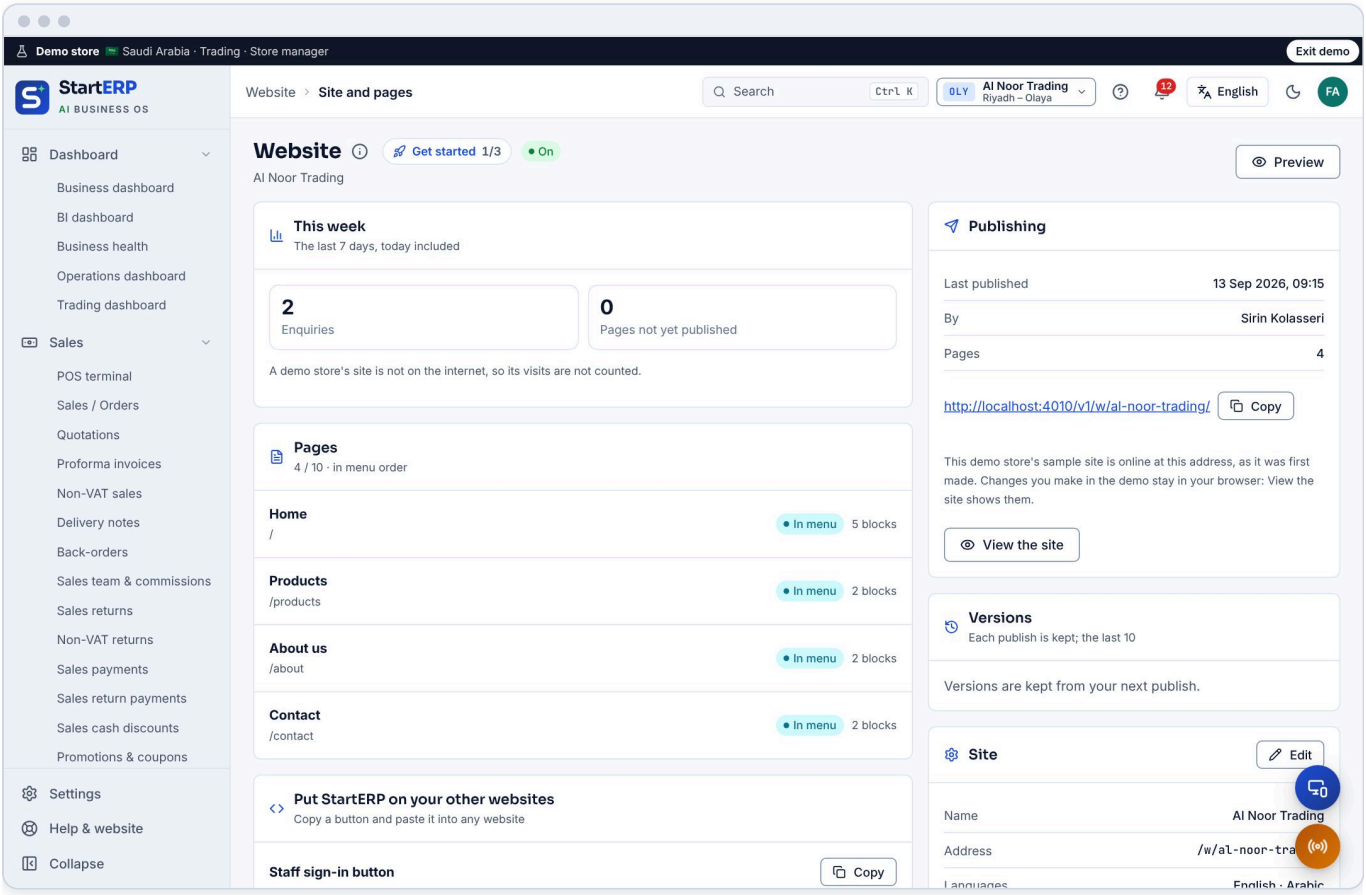

*Site and pages*

1. Open Website → Site and pages. The first time, press Create my site: a home page, a services (or menu, or products) page, an about page and a contact page are written for your kind of business, with your name, phone and address.
2. Click a page to change it. To add one, press Add page and pick a template: a service, about us, questions, contact or a blank page. The arrows set the menu order; the bin deletes a page.
3. Press Preview to see the site as visitors will, in English or Arabic, on a phone, a tablet or a computer; the menu links open the other pages.
4. Press Publish: every page goes live at once, with its sitemap and robots file. Copy the address from Publishing to share it.
5. This week shows the pages viewed (the site's own counter), the website's enquiries and bookings, and how many pages are not yet published. Each publish is kept under Versions (the last 10): Restore puts an earlier one back live at once.

**Tips.** Changes are seen by visitors only after you publish again. Put StartERP on your other websites copies a staff sign-in button, a client portal button and a link to this site to paste anywhere. With the CRM add-on, the enquiry form sends each message to Leads, marked Website and the page it came from. Without it, visitors get call, WhatsApp and email buttons instead. The home page tells Google your type of business (a clinic, a restaurant, a salon and so on, from your business category) with your address and share picture, so search can show it as a local business. Pages are kept compressed; a site may take up to 20 MB, so use smaller pictures if Publish says it is too big.

## Editing a page

A page is a stack of blocks: a banner, text, services from your catalogue, a price list, questions, customer reviews, a call to action, the enquiry form and your branches with map. Each text has an English and an Arabic box, and the preview beside the form follows as you type.




*Editing a page*

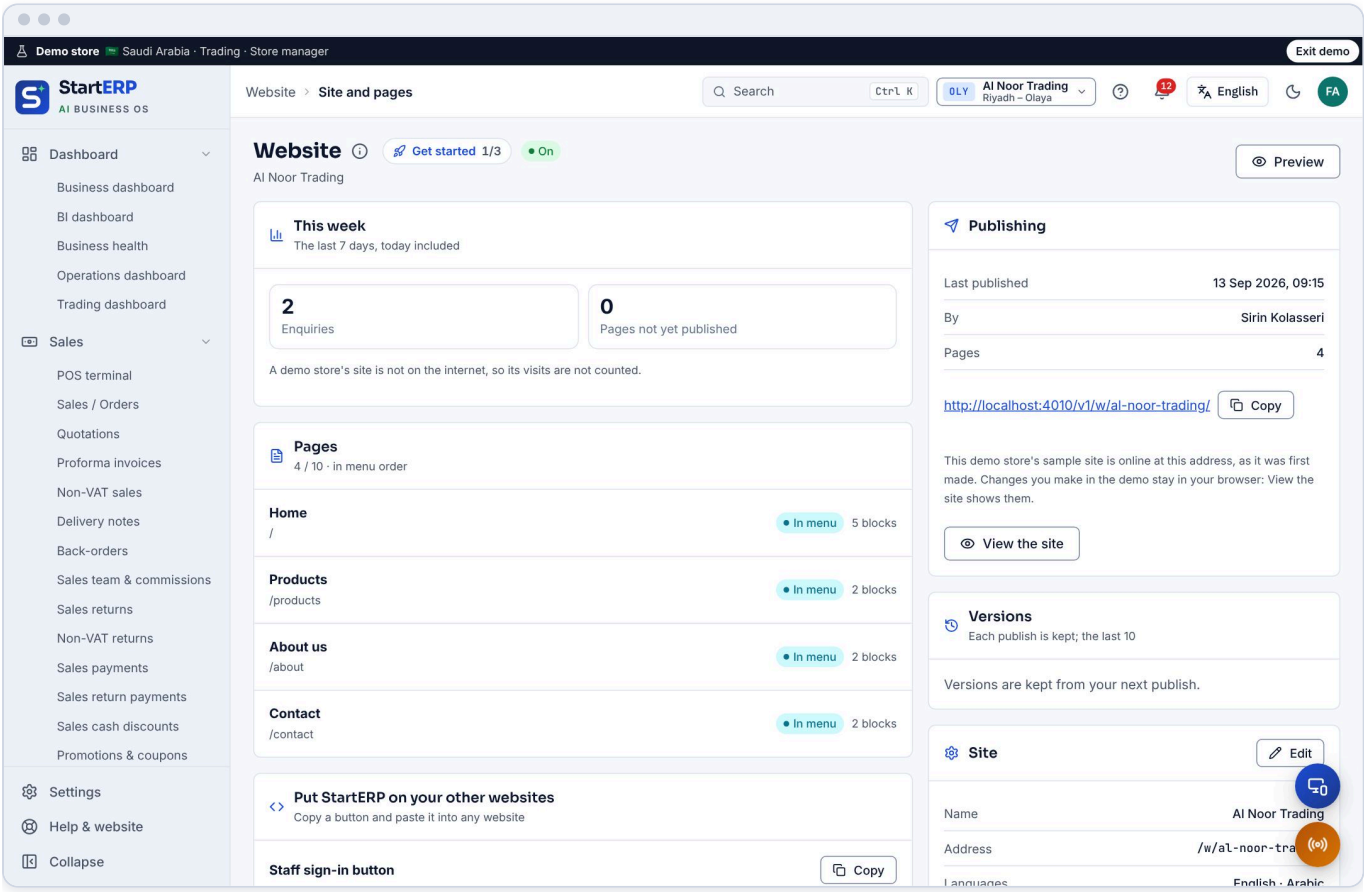
1. Open Website → Site and pages and click the page. Type in any box to change its text; on a phone or tablet press Preview at the top to see it, and Edit to come back.
2. Under Add a block, press a block to add it to the end of the page; drag it by its handle or move it with the arrows, or remove it with the bin. Undo (or Ctrl+Z) takes back the last change. Services can show your service catalogue with its fees, kept up to date at each publish.
3. With the StartAI add-on, Write with StartAI under a text writes it for your business (or improves what you wrote) in that box's language; check it, then Save. It counts towards the month's AI limit.

4. Reasons to trust lists short promises with a tick (such as genuine brands, delivery across the Kingdom, 30-day account terms); Category tiles shows your departments as tiles, each opening a page of the site. A banner without a picture can list its own points beside the heading.
5. A button can open the enquiry form, a WhatsApp chat, a phone call, another page of the site or a web address.
6. Fill Search engines if you want a title and description for Google other than the page title, and a sharing picture for WhatsApp and social media. Press Save, then Publish.

**Tips.** The address of a page is small letters, digits and dashes, such as visit-visa. ar, en, enquiry, sitemap.xml and robots.txt are kept for the site itself. In a text block, a blank line starts a new paragraph, a line starting with “- ” is a bullet, and **words** between two stars are bold.

## Site settings

The site's name and web address, its languages, its design (one of ten made for kinds of business) and your brand on it (colours, fonts, corners, buttons, logo, browser icon and share picture), the phone, WhatsApp, email and address on every page, your social media links, your Google Analytics tag and the other branches it shows. Switch the site off here to take it off the internet.




*Site settings*

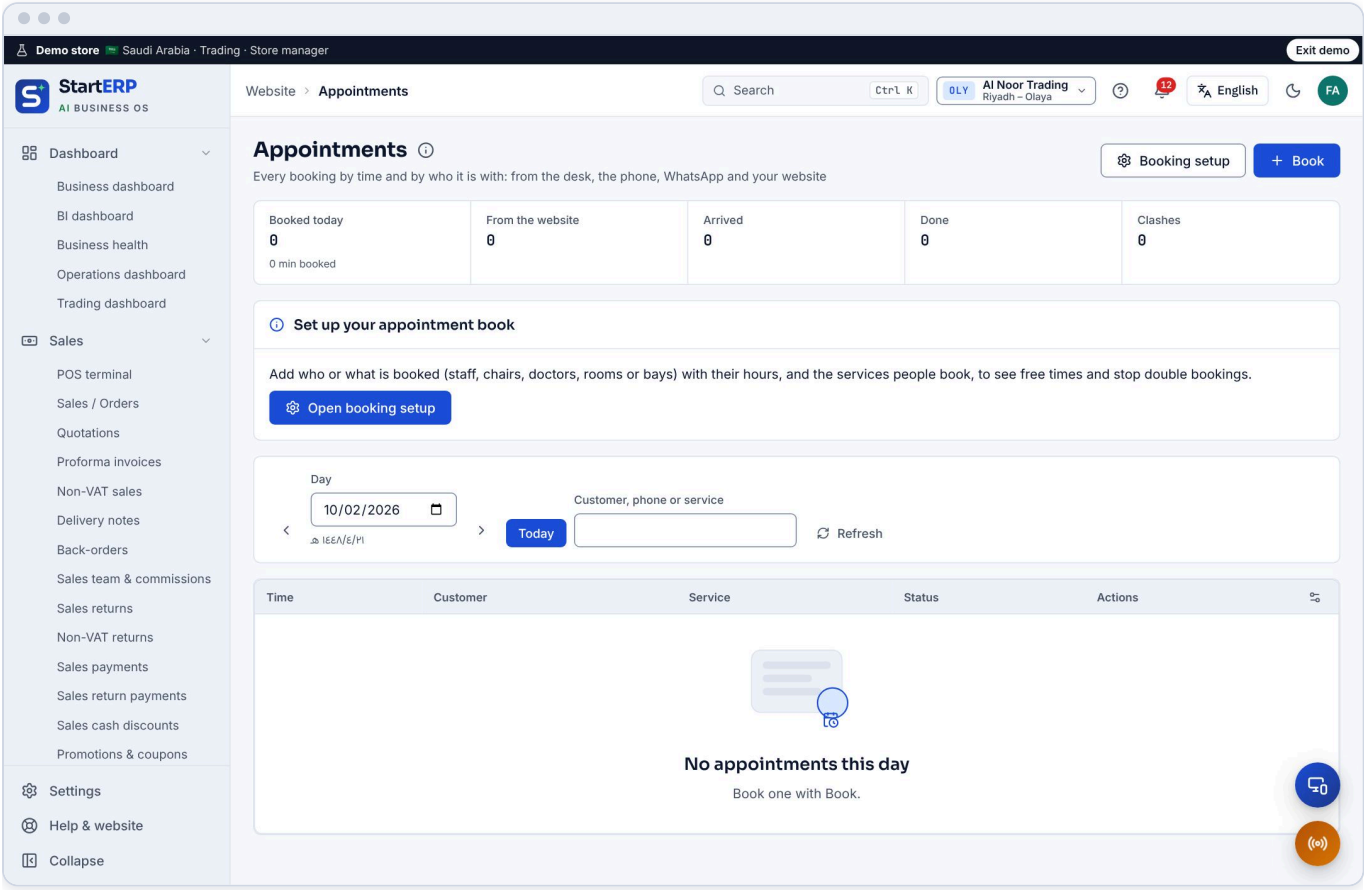
1. Open Website → Site settings. Type the site name and its web address (small letters, digits and dashes): the site opens at that address after you publish.

2. Tick English, Arabic or both. With both, the first is at the address itself and Arabic under /ar/, with a language button on every page.
3. Under Design, pick the look: the one marked "Made for your business" fits your kind of business (Care for clinics and pharmacies, Table for restaurants and cafés, Style for salons and boutiques, Motion for car businesses, Shelf for shops, Stay for hotels, Studio for offices and agencies, Active for gyms, Property for real estate, Trade for contractors and logistics). Classic keeps the look sites had before. Your pages stay the same when you switch.
4. Under Brand, set the main and second colour, the fonts, the corners (sharp, soft or round) and the buttons (solid, outline or pill); leave one empty to keep the design's own. Add the logo, a browser icon and a share picture (an https:// address) for links shared on WhatsApp and social media.
5. Fill the phone, WhatsApp number, email and address. A WhatsApp number puts a green chat button on every page.
6. Add your social media links, your Google Analytics ID (G-…) and the branches to show with their map, then press Save and publish again.
7. Under Offer bar, legal details and payments, write a short offer line for the top of every page (up to 160 characters, per language), your CR and VAT numbers for the footer, and tick the ways to pay you accept (mada, Apple Pay, STC Pay, cards, Tabby, Tamara) to show them at the bottom of every page.

**Tips.** Each web address belongs to one store: if another store already uses it, pick another. A main or second colour too light for white text is refused. Website on switched off hides every page at once, even published ones; switch it on and publish to bring the site back.

## Appointments

One appointment book for every booking: from the desk, the phone, WhatsApp and your website. A day's bookings by time, who each one is with, the free times of each service, and a clash shown in red. A time already taken is refused, even when two people book it at the same moment. Comes with the Website add-on.



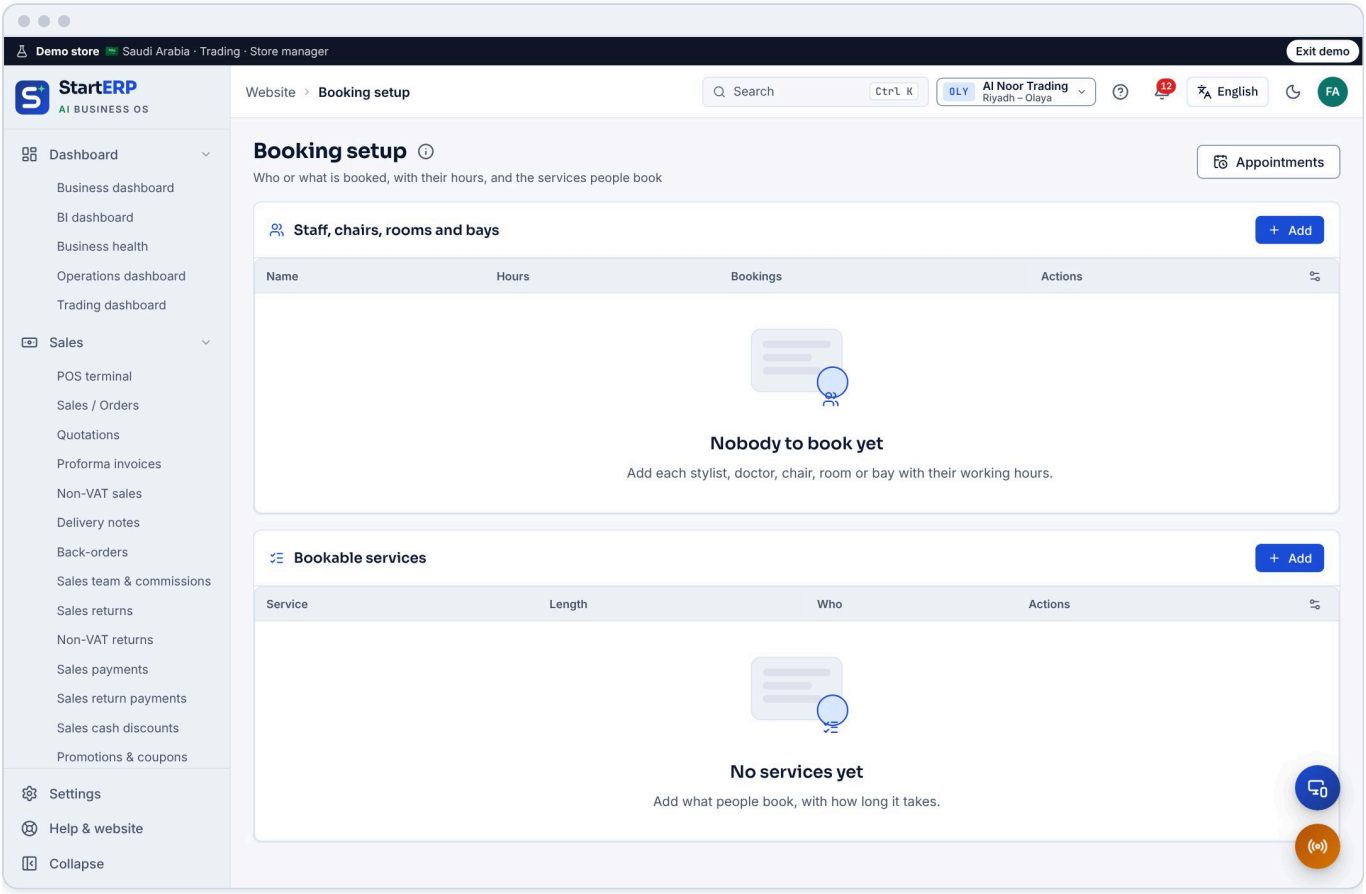

*Appointments*

1. Open Website → Appointments. Move between days with the arrows or the date, and search a customer, phone or service.
2. Press Book, pick the service and who it is with (or Anyone free), then press one of the free times. Pick the customer, or type a name and phone for a new one, and say how it was booked.
3. Move a booking on with Confirm, Arrived, Done, No-show or Cancel; WhatsApp sends the customer a confirmation.

**Tips.** A cancelled booking frees its time at once. The length plus the service's buffer is the time held. A booking made on your website shows here with From the website, and you get a New website booking notification.

## Booking setup

Who or what is booked (staff, chairs, doctors, rooms, bays or tables) with their working hours, a break, the days they work and their days off; and the services people book, with how long they take, a buffer after them, the price and who can do them.




*Booking setup*

1. Open Website → Booking setup and press Add beside Staff, chairs, rooms and bays. Type the name, pick the kind, the hours and the break, tick the working days and type any days off.
2. Press Add beside Bookable services: the name, the length in minutes, a buffer after it for cleaning or notes, the price, and who can do it (none ticked means anyone).
3. To let customers book on your website, open Website → Settings, switch on Online booking and publish. The site gets a Book button and a booking page: a service, a day, a free time, then their name and mobile number.

**Tips.** Untick Takes bookings to stop someone's bookings without losing them; untick Bookable on the website to keep them for the desk only.

02

# Online shop (e-commerce)

Add-on module | Saudi Arabia, Kuwait, United Arab Emirates, Qatar, Oman, Bahrain only

## Sell online on your own website, in English and Arabic

Tick Sell online on the products and services you want on the web and turn the shop on: your website gets a modern shop with search, categories, pictures, stock badges and prices with VAT, a cart and a checkout that works on any phone. Personal buyers give their name, mobile and Saudi short address; companies add their VAT number, CR and purchase order, so the tax invoice carries them. Set your delivery fee, the order above which delivery is free, the smallest order and collection at your branches. Each order waits on the Online orders board: accept it and it becomes a sales invoice like a sale at the counter, ZATCA reported, with the money taken on delivery or at the counter; decline it with a reason the shopper sees on the order page. Prices always come from your catalogue, never from the shopper's browser. Shoppers can also pay online through Tap: mada and cards in Saudi Arabia, KNET and cards in Kuwait, where the shop speaks Kuwaiti addresses (area, block, street, house) and shows no VAT; cards and Apple Pay in the UAE and Oman, NAPS debit cards in Qatar and Benefit in Bahrain, each with its own address form.

### What you get

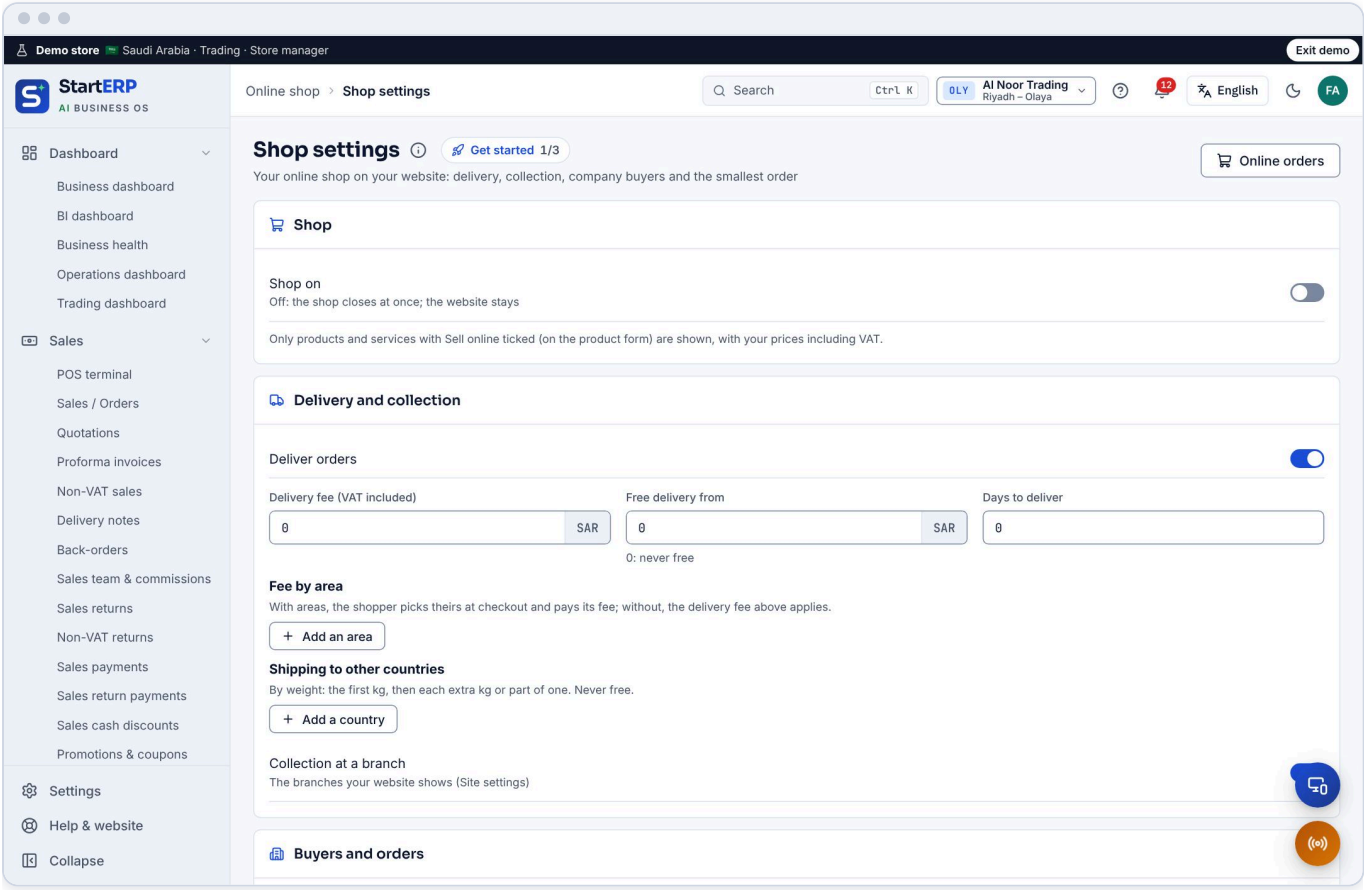
- A modern shop on your website: search, categories, stock badges, cart and checkout in two languages
- Companies buy with their VAT number, CR and PO on the tax invoice
- Delivery fee, free delivery above an amount, smallest order and branch collection
- Accept an order into a ZATCA-ready sales invoice; the shopper follows it on the order page

### GET STARTED IN 3 STEPS

1. **Tick Sell online on your products.** Only ticked products appear in the shop.
2. **Turn the shop on.** Set delivery, collection and the smallest order.
3. **Accept the orders.** Each accepted order becomes a sales invoice.

## Online shop

Sell the products and services you tick on your own website: shoppers search, add to a cart and check out in English or Arabic, as a person or as a company with its VAT number, CR and purchase order, for delivery or collection at a branch, and pay on delivery, at the counter or by card through Tap. The shop needs the Website add-on and a published site.



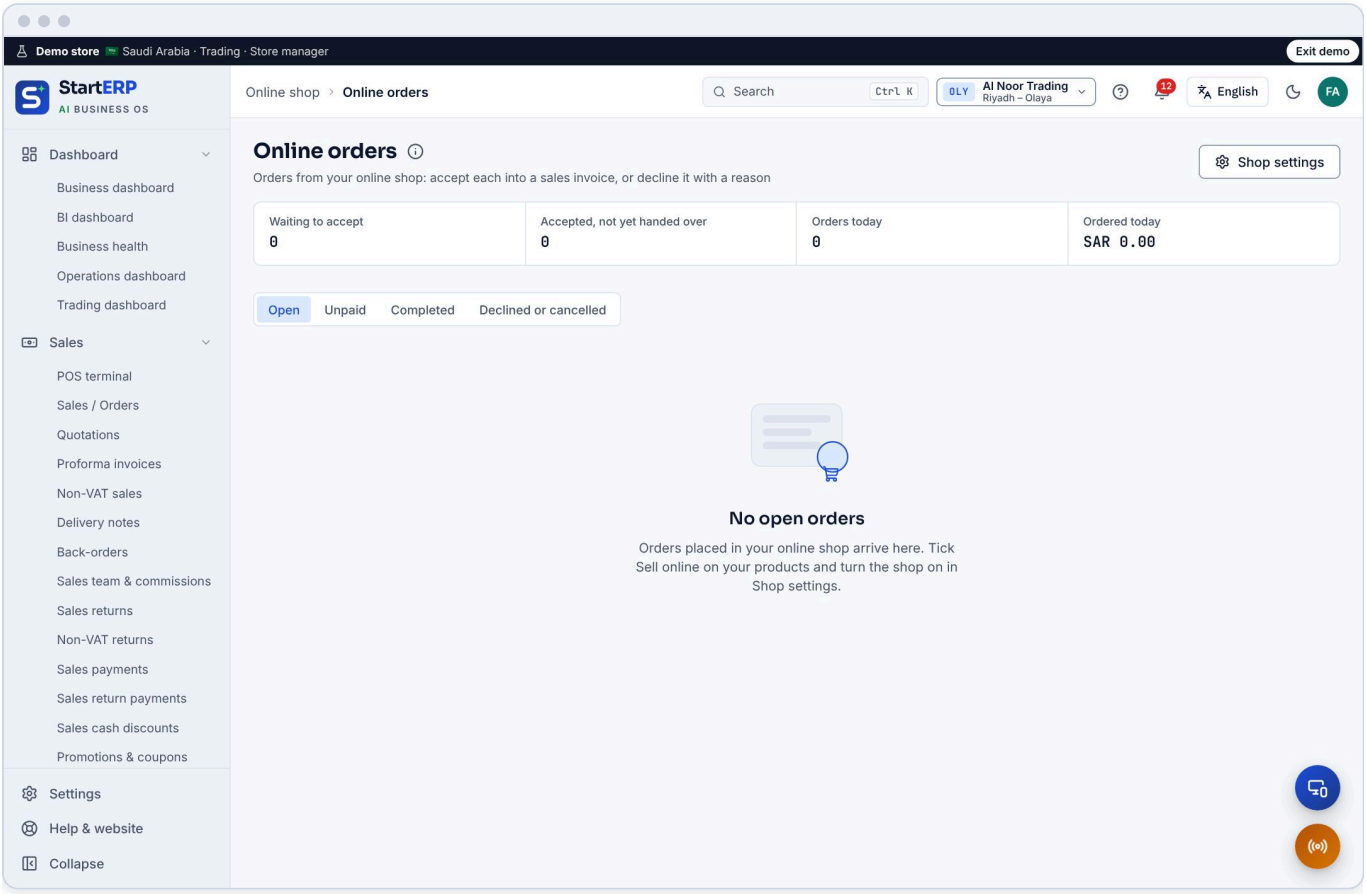

*Online shop · demo store: Trading, Saudi Arabia*

1. Open a product (or service), tick Sell online and save. Only ticked items with a price appear in the shop, with their picture, price including VAT and whether they are in stock.
2. Open Online shop → Shop settings. Set delivery on or off, the delivery fee (VAT included) and the order total above which delivery is free; collection at the branches your website shows; whether companies may buy with their tax details; the smallest order and a note shoppers see.
3. Switch Shop on and save. The shop opens at your website address followed by /shop; copy the link to put it on your pages, WhatsApp and social media.

**Tips.** Prices, VAT and the delivery fee always come from your catalogue and settings at checkout, never from the shopper's browser. Switch Shop off to close the shop at once; your website stays as it is. Card payments: on Shop settings, type your bank account under Card payments and press Ask for card payments. Once StartERP has set up your Tap account, switch on Offer Pay by card: shoppers pay by mada, Visa, Mastercard or Apple Pay on Tap's page, and Tap pays the total less the StartERP fee straight to your bank. Cash on delivery and at the counter carry no fee.

## Online orders

Every order placed in your online shop waits here. Accept it to make its sales invoice (unpaid until you take the money on delivery or at the counter), decline it with a reason the shopper sees, mark it ready for collection, completed, or cancel it.




*Online orders · demo store: Trading, Saudi Arabia*

1. Open Online shop → Online orders. New orders come first with the buyer, the items, delivery or collection and the total.
2. Press Accept: the sales invoice is made with the buyer as customer (a company by its VAT number), the delivery fee as shipping and the order number in the remarks, ZATCA reported like any sale.
3. When the goods are packed press Ready, and Completed when they are handed over; take the payment on the invoice as usual.
4. Decline a new order, or cancel an accepted one, with a reason: the shopper sees it on the order page. A cancelled order's invoice needs its sales return.

**Tips.** If the invoice total differs from what the shopper saw (a price changed in between), the order shows a warning to check it.

03

# White-label branding & domain

Add-on module

## Your brand on the whole system, on your own web address

Put your own name, logo, colour and browser icon on the app your staff use, on the sign-in page and on the client portal your customers see. Pick the branches that carry the same brand, and hide the StartERP name if you resell the system or simply want it to be yours. The screen shows a live preview as you go and checks that your colour stays readable on white. Then add your own web address, such as portal.yourcompany.com: copy the two DNS records shown, press Verify, and the app opens there in your brand with its own secure certificate.

### What you get

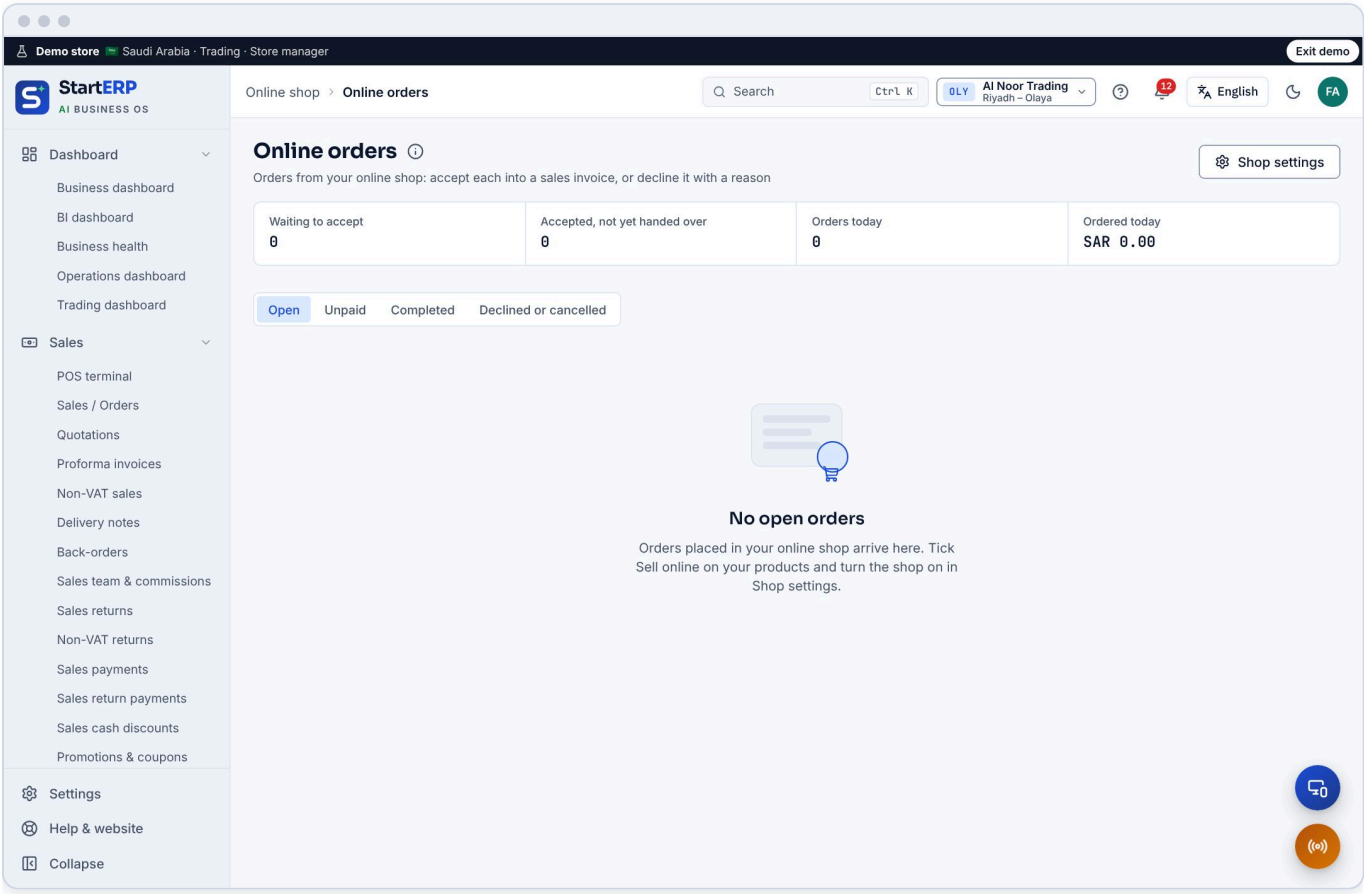
- Name, logo, colour, browser icon and sign-in picture, with a live preview and a contrast check
- One brand for the branches you pick; the StartERP name hidden when you want
- Your own web address proven by a DNS record and secured with its own certificate
- The client portal and the sign-in page in your brand on that address

### GET STARTED IN 3 STEPS

1. **Upload your logo and colour.** The preview shows it live.
2. **Pick the branches.** Choose which carry your brand.
3. **Add your own address.** Copy two DNS records and press Verify.

## Branding

Put your own name, logo and colour on StartERP: the top corner of the app, the browser tab, the sign-in page and the client portal show your brand instead of StartERP's. One brand can cover several of your stores, and the StartERP name can be hidden. Part of the White-label add-on.



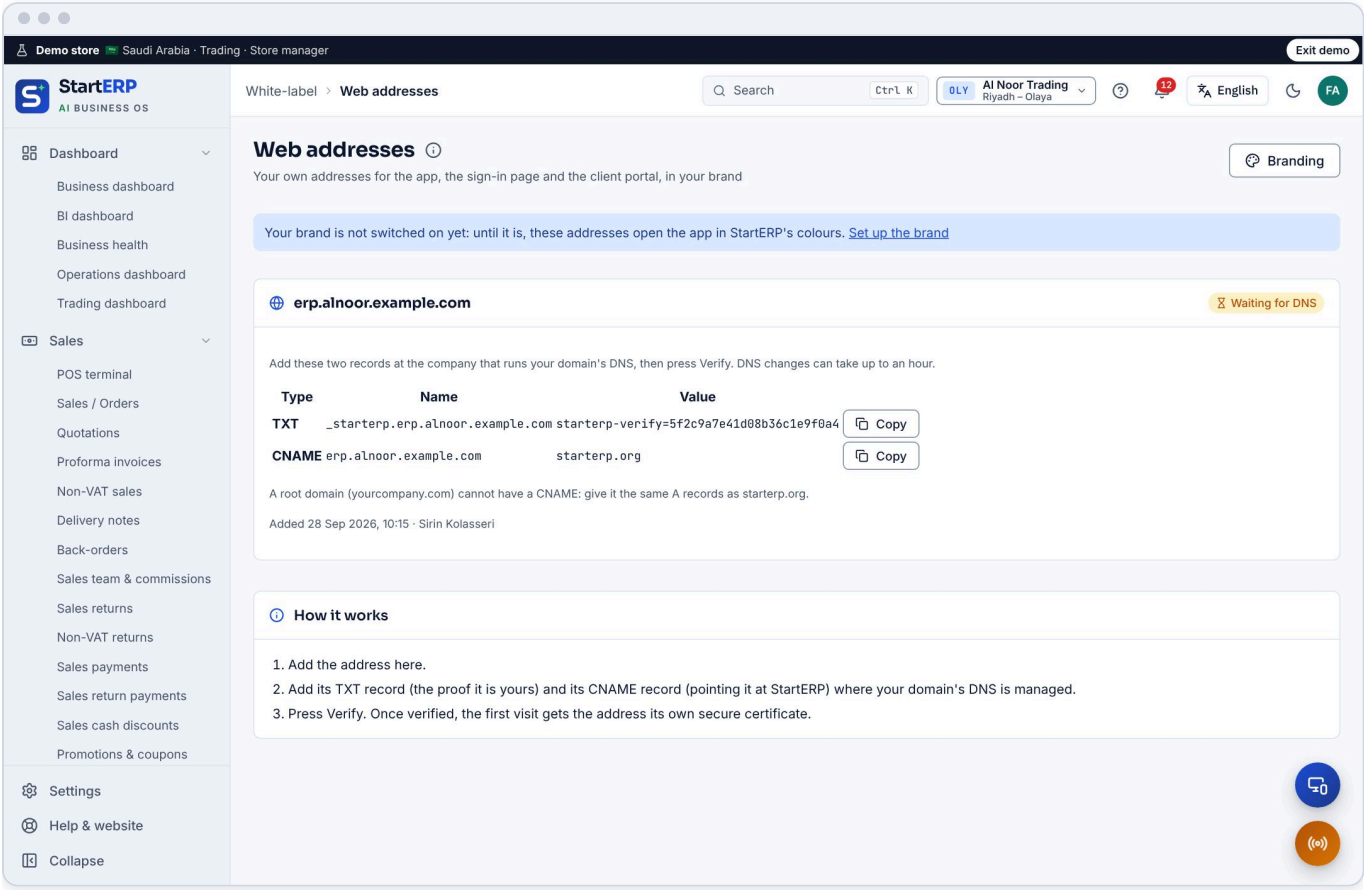

*Branding*

1. Open White-label → Branding. The preview on the right shows the app and the sign-in page as your staff will see them, and changes as you type.
2. Type the app name (and its Arabic name), pick the brand colour from the ready-made colours or type its code, and add the logo, the browser tab icon and the sign-in picture. Large pictures are made smaller when you add them.
3. Tick your other stores under Stores that use this brand to give them the same brand, and switch Hide the StartERP name on if you do not want “Powered by StartERP” shown.
4. Switch Use this brand on and press Save: the app shows your brand at once. Open the sign-in page from the screen to see it as your staff will.

**Tips.** A colour too light to read on white is refused: buttons and links must stay readable. The contrast badge on the preview says how well it reads. A store can use one brand only: if another store's brand already covers it, take it off there first. Your staff sign in on your own web address in this brand once you add one on Web addresses.

## Web addresses

Your own web address for StartERP, such as erp.yourcompany.com: your staff open it and sign in on a page in your brand, and the client portal answers there too. You prove the domain is yours with a TXT record and point it at StartERP with a CNAME record; Verify checks both. Part of the White-label add-on.




*Web addresses*

1. Open White-label → Web addresses and press Add address. Type an address of a domain you own; a sub-domain such as erp. or portal. is easiest.
2. The address shows the two records to add: a TXT record (the proof it is yours) and a CNAME record pointing at starterp.org. Copy each one and add it where your domain's DNS is managed.
3. Press Verify. When both records are found the address turns Verified; otherwise the card says which record is missing. DNS changes can take up to an hour.

**Tips.** A root domain (yourcompany.com) cannot have a CNAME: give it the same A records as starterp.org instead. A store can have up to 5 addresses, and an address belongs to one store only. Remove takes an address off; the sign-in page there stops showing your brand.

04

# Salla store sync

Add-on module | Saudi Arabia, United Arab Emirates, Kuwait, Bahrain, Qatar, Oman only

## Your Salla orders, invoiced by themselves

Connect your Salla shop once. Every paid online order then arrives in StartERP as a sales invoice, reported to ZATCA like your shop's own sales, with the customer found by phone or added, the items matched to your products by SKU or barcode, and the money kept in a Salla payouts account until Salla pays it to your bank. Orders still waiting for payment, cancelled orders and anything that needs a look are listed in one log, and a check every 15 minutes catches any order a notification missed. Each item of the shop, variants too, is linked to a product here, and the shop's quantities can follow your stock.

### What you get

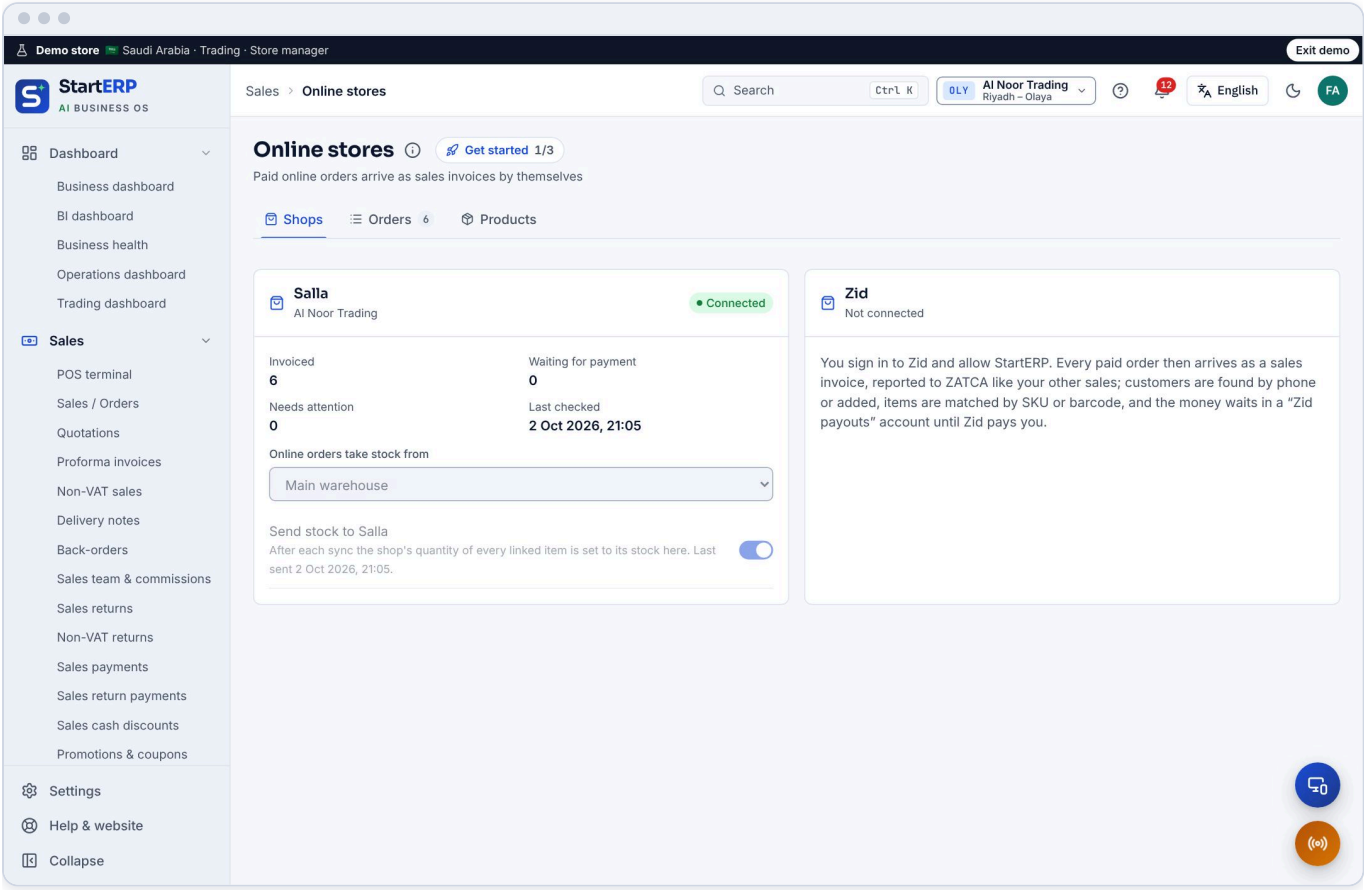
- Paid orders become sales invoices
- ZATCA reported like every sale
- Customers by phone, items by SKU or barcode
- The shop's stock follows yours

### GET STARTED IN 3 STEPS

1. **Connect your Salla shop.** Sign in once to allow access.
2. **Link products.** Matched by SKU or barcode.
3. **Watch orders arrive.** Paid orders become invoices.

## Online stores

Connect your Salla shop once and every paid online order arrives as a sales invoice, reported to ZATCA like your other sales. The customer is found by phone or added, items are matched to your products by SKU or barcode, and the money waits in a Salla payouts account until Salla pays you. Part of the Salla store sync add-on for shops in the Gulf.




*Online stores · demo store: Trading, Saudi Arabia*

1. Give your products the same SKU as in Salla, as their code, part number or barcode, so online items take stock from the right product.
2. Open Sales → Online stores and press Connect Salla. Sign in to Salla and allow StartERP; you come back here with the shop connected.
3. Pick the warehouse online orders take stock from, if you have more than one.
4. On the Products tab press Fetch items: every item of your shop (each variant on its own) is linked to the product with the same SKU. Link the rest by hand with Link.
5. Switch on Send stock to Salla: after each sync the shop's quantity of every linked item is set to its stock here, in whole units. Send stock now sends it at once.
6. Each paid order now becomes a sales invoice by itself. The Orders tab lists every order with its invoice; orders waiting for payment wait there until they are paid.

7. When Salla pays you, record the transfer from the Salla payouts account to your bank as a journal or bank transfer.

**Tips.** Cash on delivery orders become invoices once Salla marks them delivered or completed. An item with no product of the same SKU still goes on the invoice under its own name, but takes no stock; the Orders tab shows how many were not matched. Only quantities that changed since the last send go out, and an item Salla sells without a limit is left alone. Salla applies a stock update within a few minutes. An order that could not be invoiced shows Needs attention with the reason; fix it (for example the product's price or the user who connected the shop) and press Try again. StartERP also checks Salla every 15 minutes, or press Sync now. When a paid order is cancelled or refunded on the shop, its invoice gets a full sales return by itself, refunded from the payouts account and reported to ZATCA like your other returns. Saudi shops on Zid connect the same way with the Zid store sync add-on: press Connect Zid and allow StartERP. Zid orders become invoices and returns like Salla's; the Products tab and Send stock are for Salla only for now.

05

# Zid store sync

Add-on module | Saudi Arabia only

## Your Zid orders, invoiced by themselves

Connect your Zid shop once. Every paid online order then arrives in StartERP as a sales invoice, reported to ZATCA like your shop's own sales, with the customer found by phone or added, the items matched to your products by SKU or barcode, and the money kept in a Zid payouts account until Zid pays it to your bank. A paid order cancelled or refunded on Zid gets a sales return of its whole invoice, and a check every 15 minutes catches any order a notification missed.

### What you get

- Paid orders become sales invoices
- ZATCA reported like every sale
- Customers by phone, items by SKU or barcode
- Cancelled orders returned by themselves

**GET STARTED IN 3 STEPS**

1. **Connect your Zid shop.** Sign in once to allow access.
2. **Link products.** Matched by SKU or barcode.
3. **Watch orders arrive.** Paid orders become invoices.

> **Online stores** is explained in the chapter “Salla store sync”.

06

# API access & sandbox

Add-on module

## Connect your own software and partners, safely

Give each program that should reach your store, an accounting tool, your online shop, a delivery partner, its own API client with a client ID and a secret. Tick which areas it may read or change, list the IP addresses it may call from and how many calls a minute it may make; it never gets more than the person who made it. Programs get short-lived OAuth2 tokens, every call is logged, a new secret ends the old one at once, and a sandbox store with sample products lets developers try anything without touching real data. The developer guide has the address, ready-to-copy examples, the full OpenAPI description and a Postman collection. No fee per call.

### What you get

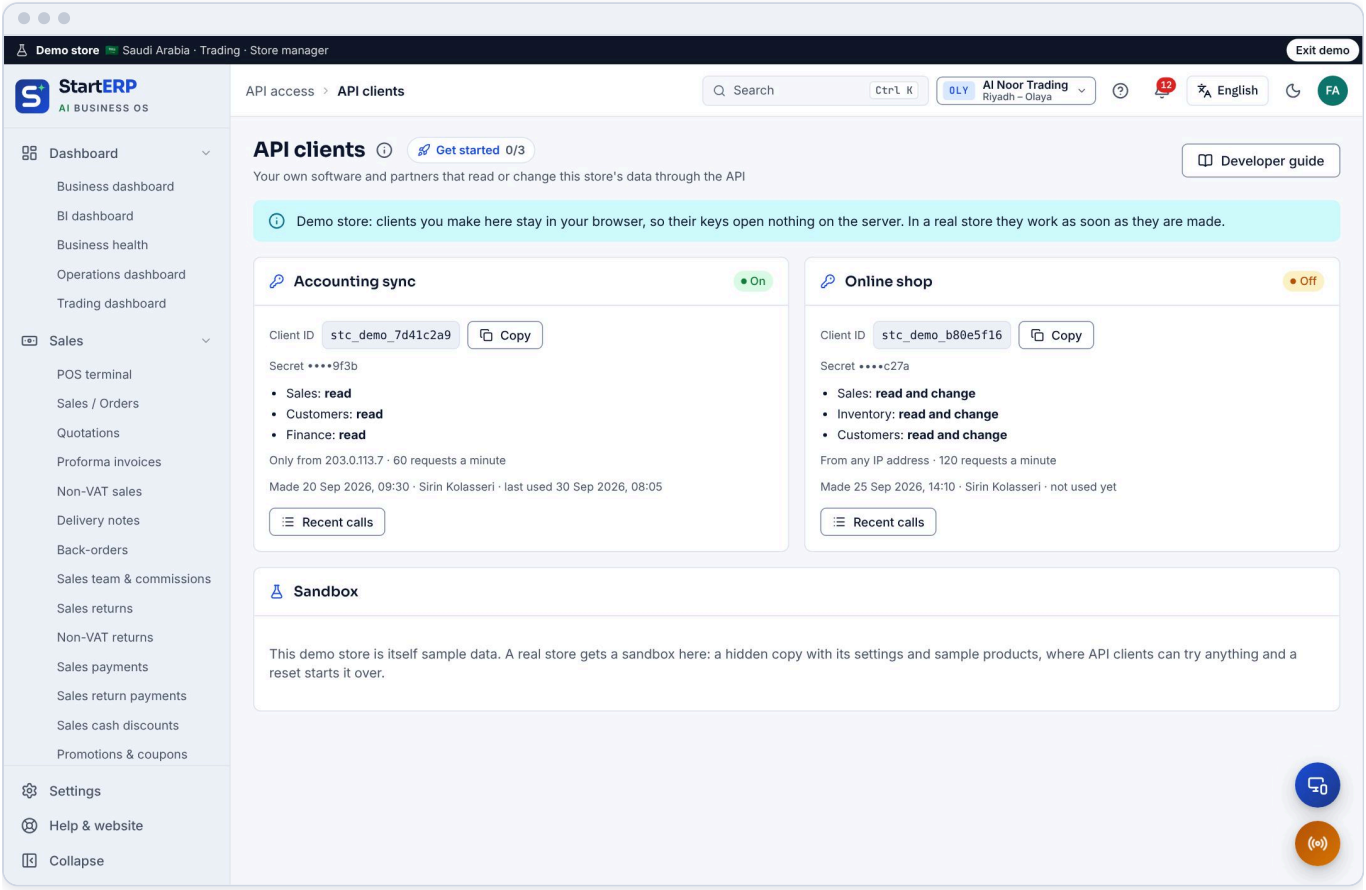
- A client per program, with read or change per area and never more than its maker
- Short-lived OAuth2 tokens, IP allow-list, rate limit and a 30-day request log
- A sandbox store with sample data, reset any time
- Signed webhooks for Zapier and Make, a developer guide with OpenAPI and Postman; no fee per call

### GET STARTED IN 3 STEPS

1. **Create an API client.** Name the program and get its ID and secret.
2. **Choose its scopes.** What it may read or change, and from where.
3. **Follow the developer guide.** Examples, OpenAPI file and a sandbox store.

## API clients

Connect your own software, an accounting tool, your online shop or a partner to this store. Each API client gets a client ID and a secret, the areas it may read or change, an optional list of IP addresses and a rate limit; its calls are logged for 30 days. The sandbox is a hidden copy of the store with sample products for trying everything safely. Part of the API access add-on.



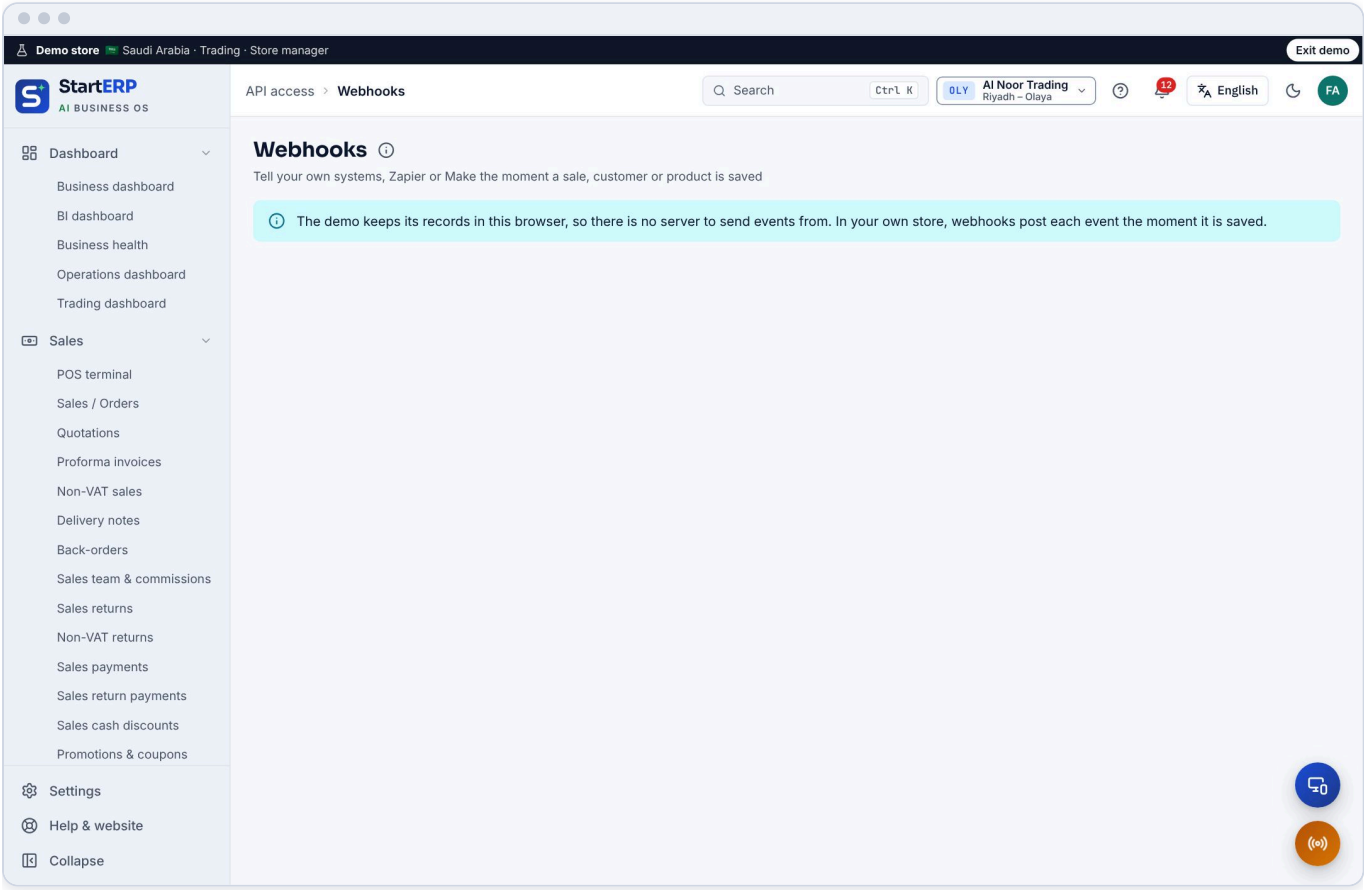

*API clients*

1. Open API access → API clients and press New client. Name it after the program that will use it, such as Accounting sync.
2. Tick Read or Change for each area it needs, and nothing more. Change brings Read with it. A client never does more than you may do yourself.
3. Optionally list the IP addresses it calls from (one per line, ranges like 198.51.100.0/24 work) and change the requests a minute, then press Create.
4. Copy the client ID and the secret into the program's settings now: the secret is shown only once. The developer guide shows how the program asks for a token and makes its first call.
5. Recent calls shows each call with its result. New secret stops the old secret and its tokens at once; Switch off pauses a client; Remove ends it.

**Tips.** Press Create the sandbox, then tick Works on the sandbox when you make a client: its token reaches only the sandbox, never your real sales or stock. Reset the sandbox starts it over. Make one client per program, so switching one off never stops the others. A store can have up to 10. In a demo store the clients stay in your browser and their keys are samples that open nothing on the server.

## Webhooks

Send each new or changed sale, return, quotation, purchase, customer, vendor, product or expense to your own system, Zapier or Make the moment it is saved. Part of the API access add-on.



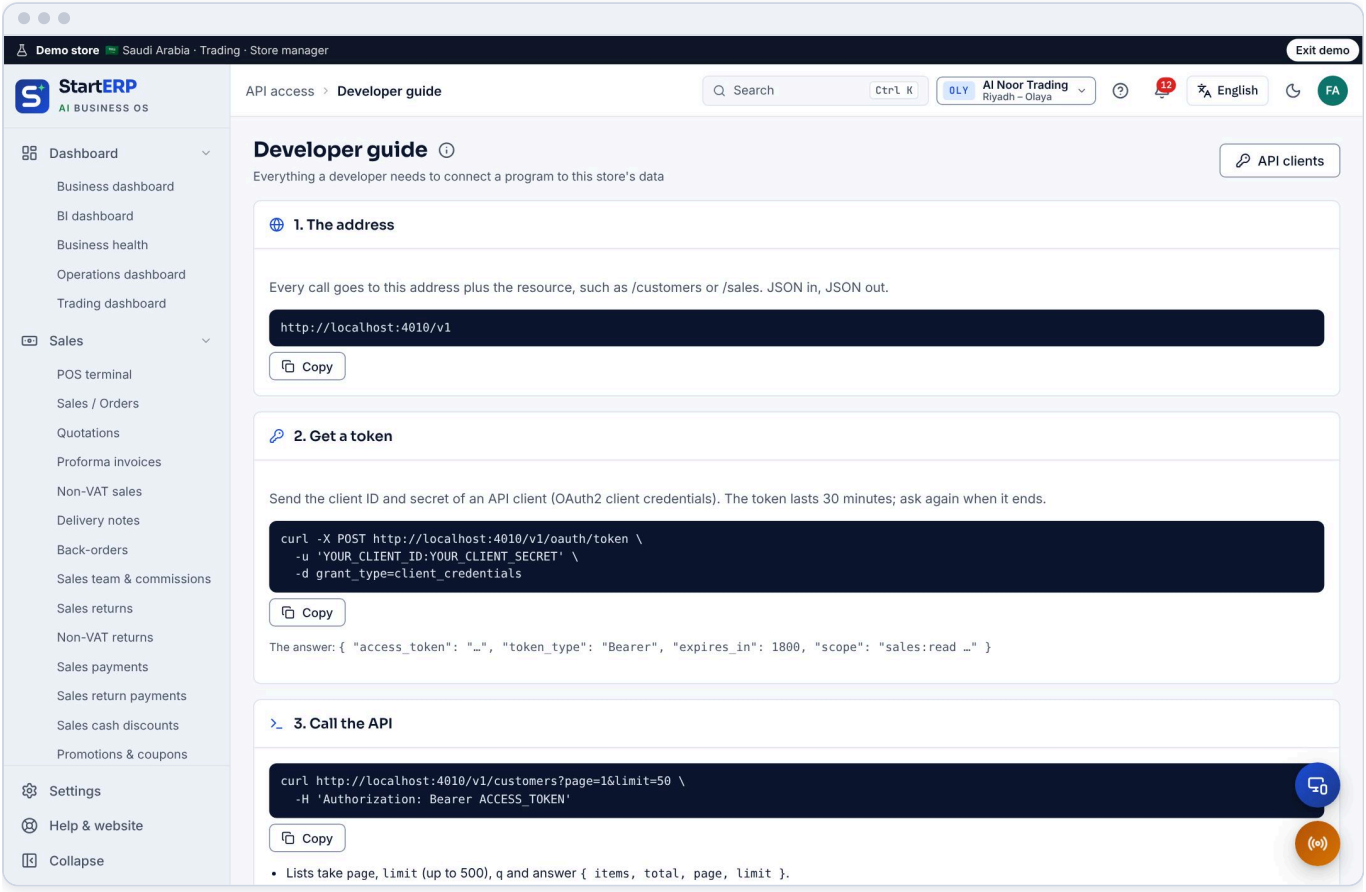

*Webhooks*

1. Open API access → Webhooks and press New webhook.
2. Paste the https:// address of your system, or the one Zapier or Make gives you, and tick the events it should hear about.
3. Copy the signing secret, shown once, into your system, then press Send a test to check the address answers.

**Tips.** A failed delivery is tried again after 30 seconds and after 5 minutes. After 20 failures in a row the webhook is switched off until you switch it on again. Each delivery carries the X-StartERP-Signature header: check it with the secret so you know the event came from StartERP.

## Developer guide

What a developer needs to connect a program to this store: the API's address, how to get a token with an API client's ID and secret and make a call (curl examples to copy), the full OpenAPI description and a Postman collection to download, the permissions, the limits and the error answers. No fee per call. Part of the API access add-on.




*Developer guide*

1. Open API access → Developer guide. Copy the address: every call goes to it plus the resource, such as /customers.
2. Get a token: send the client's ID and secret to /oauth/token (the first example). The token lasts 30 minutes; ask again when it ends.
3. Call the API with the token in the Authorization header (the second example). Lists answer page by page.
4. Press OpenAPI description for every resource and its permissions, or Postman collection to try the calls in Postman with the token already set up.

**Tips.** Send an Idempotency-Key with a create, so a retry after a dropped connection never makes the record twice. Every answer carries X-RateLimit-Remaining; a 429 says how many seconds to wait in Retry-After.

07

# RBAC: custom roles & permissions

Add-on module

## Roles shaped exactly like your team

Go beyond the ready-made roles. Create your own roles and choose, screen by screen and action by action, what each team can see, create, edit, delete or print, with its own discount limit.

### What you get

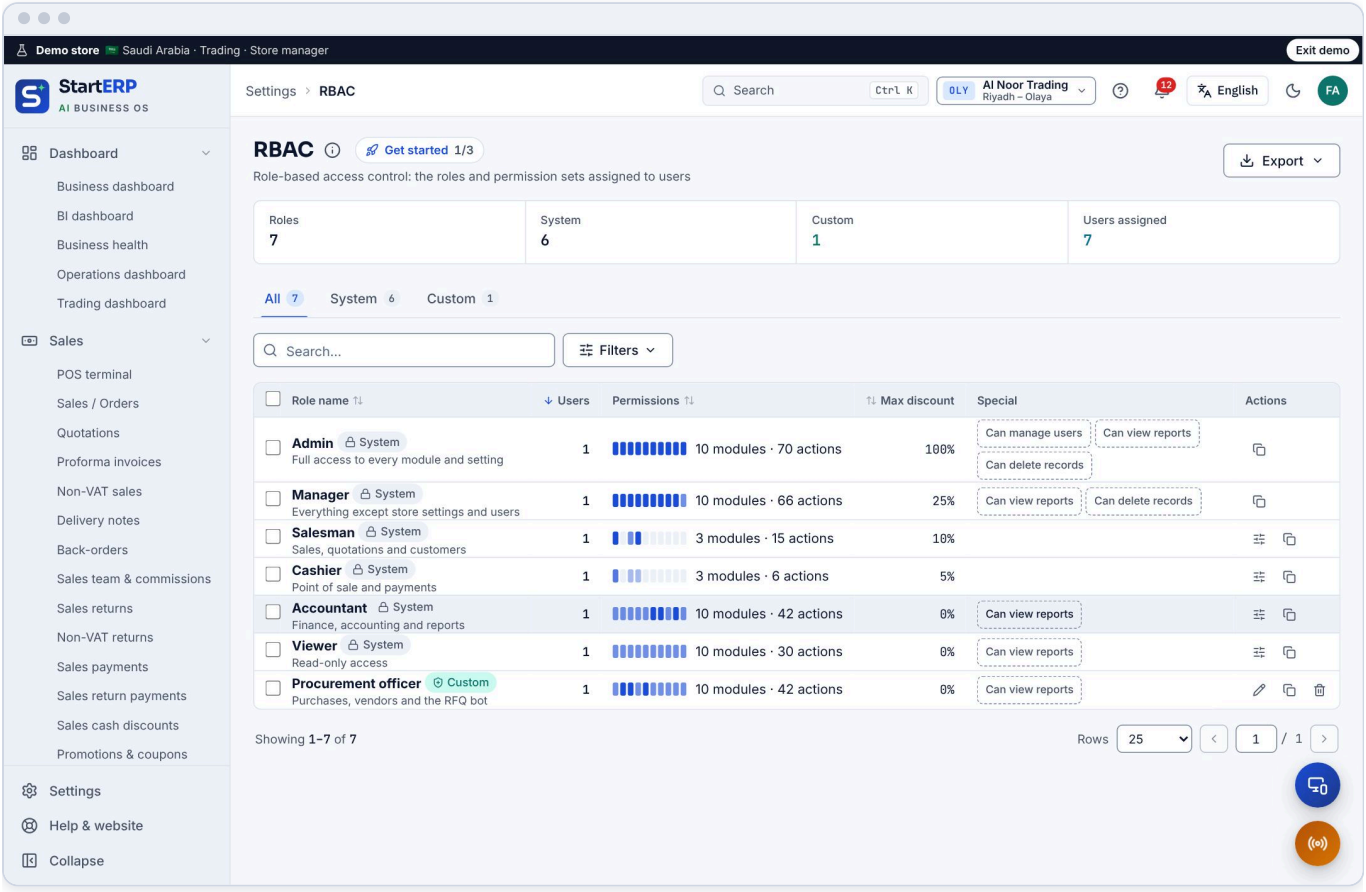
- Unlimited custom roles
- Permissions per module and per action
- Discount limit and report access per role
- Without it, the six system roles are used

### GET STARTED IN 3 STEPS

1. **Create a role.** Name it after the job, such as Store keeper.
2. **Tick what it may do.** Screen by screen: view, create, edit, delete, print.
3. **Give it to your team.** Pick the role on each user.

# RBAC (roles & permissions)

Role-based access control: permission sets (roles) assigned to users, each a matrix of modules × actions, a maximum discount and special permissions.




*RBAC (roles & permissions)*

## ON THE LIST

1. Browse the System and Custom tabs; each row shows users, a permission summary, Max discount and special permissions.
2. Click New role to build one from scratch, or Duplicate an existing role to start from its permissions.
3. Click a row to open the role, its users and the effective permissions preview.

**Tips.** The menu, New and Edit buttons follow the role: a user only sees the screens their role allows, and a link to any other screen shows "You don't have access to this page". System roles keep their screens and actions and cannot be deleted — duplicate them to make an editable custom version. To change a built-in role's Max discount % or what it may do at the POS till, open the role and click Edit limits (no add-on needed). The owner can do it for every role except Admin; a Manager for the roles under Manager. Stock and cost: switch on Cost price locked so the role cannot change a product's cost price (purchases still update it), and Stock adjustments need approval so it cannot change stock by hand: its stock counts wait as Awaiting approval until a manager approves and posts them. Both are on Edit limits for built-in roles and on the form of a custom role. A role that still has users cannot be deleted; move its users to another role first. Custom roles are the RBAC add-on. Without it the store uses the ready-made system roles: New role, Duplicate, Edit and Delete are hidden and a banner links to Settings → Subscription & billing to add it. Roles made before stay assigned and keep working. Permissions are enforced only when "RBAC (roles & permissions)" is switched on in Store settings → Settings.

## ON THE FORM

1. Enter a unique Role name and a short Description.
2. Tick the boxes in the Permission matrix: View, Create, Edit, Delete, Print and Export for each module.
3. Use a column header, the All column or Select all to tick many boxes at once.
4. Set Max discount % and the special permissions: Can manage users, Can view reports, Can delete records.
5. Pick a user in Effective permissions preview to compare their current access with this draft, then click Save.

**Tips.** Saving changes to a role applies to all of its users immediately. The Admin role always has full access and cannot be edited or deleted. Opening Edit on a system role shows it read-only with Duplicate to edit.

## ON THE RECORD

1. Check the Users, Modules, Actions and Max discount tiles.
2. Open the Permissions tab for the full matrix and special permissions.
3. Open Users to see who has this role, and click a user to open them.
4. Use Effective permissions to compare any user's access with this role (green = extra, red = missing).

**Tips.** A deleted custom role can be restored with Undo right after deleting. On a system role, Duplicate is the main action because it cannot be edited.

08

# Secure access

Add-on module

## Your store, open only to your own staff

Lock your store like a banking app. Only your office network may open it, only phones and PCs you approved, only during your working hours, with 2-step sign-in for everyone and sign-out when a screen is left idle. Staff can sign in with your Google Workspace or Microsoft 365 account, so whoever leaves the company loses access the moment their company account is closed. StartERP checks the rules on every action, not only at sign-in, each branch keeps its own rules, every refused sign-in is in the access log, and a locked-out owner gets a safe rescue link by e-mail.

### What you get

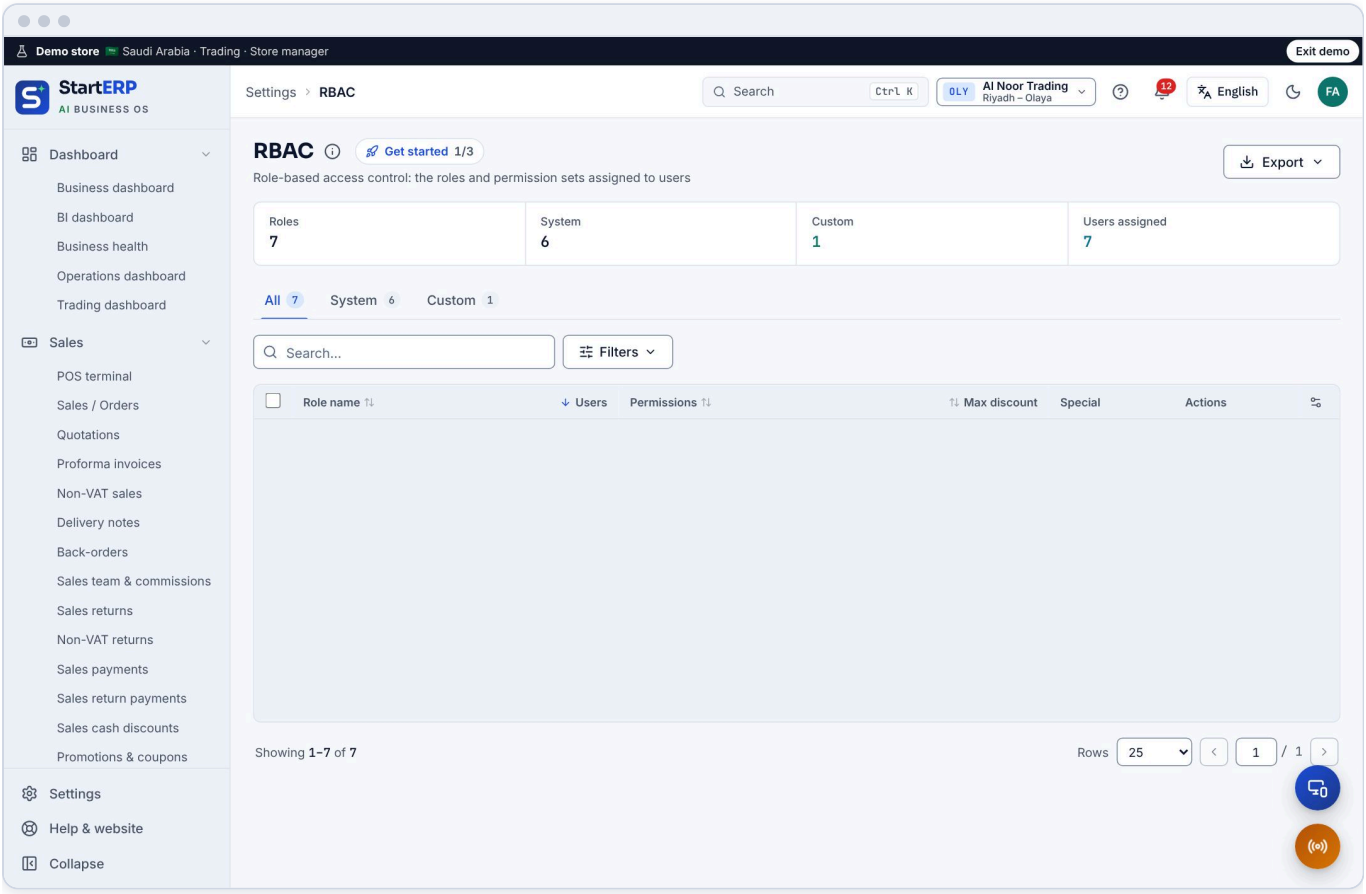
- Only your office network and approved devices
- Working hours, idle sign-out and 2-step for everyone
- Company sign-in with Google Workspace or Microsoft 365
- Checked on every action, with an access log and owner rescue

### GET STARTED IN 3 STEPS

1. **Add your office network.** Press Add my address while you are in the office.
2. **Approve your staff's devices.** Approve each new phone or PC, or give a device code.
3. **Set hours, idle sign-out and save.** Then read who was refused in the access log.

## Secure access

A banking-style lock for one store (Secure access add-on): only your office network, approved devices, working hours, sign-out when idle, 2-step for everyone and company sign-in with Google Workspace or Microsoft 365. StartERP checks the rules on every action, not only at sign-in.




*Secure access*

1. Add the Secure access add-on on Subscription & billing, then open Settings → Security and scroll to Secure access.
2. Office network: tick “Open this store only from these internet addresses”, press “Add my address” while you are in the office, and add the other offices' fixed addresses or ranges (such as 51.36.10.0/24).
3. Approved devices: tick “Only approved phones, tablets and PCs”. A new device shows “This device needs approval” and appears in the list: press Approve, or press “Make a device code” and give the person the 8-letter code to type on their screen.
4. Working hours: pick the days and the From and To times in the store's time (a To earlier than From runs past midnight). Tick “Admins may sign in at any time” to keep owners free.
5. Sign-in strength: set the idle minutes (5 to 720, 0 = off); a minute before, the screen warns and offers “Stay signed in”. Tick “2-step verification for everyone” to ask for it from the first sign-in.

6. Company sign-in: tick it, pick Google Workspace or Microsoft 365, type your e-mail domain (and your Microsoft tenant id), and tick Required if staff may not use a password. Staff then press “Sign in with your company account” on the sign-in page.
7. Tick “Turn on Secure access for this store” and press Save. “Copy to other branches” gives the same rules to your other stores.

**Tips.** StartERP will not save rules that would lock you out: add your own address or approve your device first. Saving with devices on approves the device you are using. Locked out anyway (new internet line, lost laptop)? An owner tries to sign in as usual and, when refused, presses “Locked out? Owners get a rescue link”: the e-mailed link lets them in from that address for an hour, and the other Admins are told. Rules belong to one store: a person with several branches keeps working in the branches whose rules they pass. With the office network or devices on, AI apps connected with a personal key (ChatGPT, Claude) are refused unless you tick “Let connected AI apps read this store”. StartAI inside StartERP keeps working. The Access log lists refused sign-ins, rule changes, approved and blocked devices and rescue links. StartAI Radio tells you when devices are waiting for approval.

# 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 |
| 9 | **Online, integrations and control (this guide)** |
| 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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