StartERP · AI business OS

Your StartERP user guide

Step-by-step instructions for every point on your software requirements list: customers, suppliers, quotations, sales, stock, purchases, payments, users, salespeople and commission, expenses and accounts, Saudi VAT and ZATCA Phase 2, and the owner's dashboard.

The screenshots come from the StartERP demo store for a Saudi trading business (starterp.org/#/demo-store), so the names and figures in them are sample data. Your own screens show your company, your products and your figures.

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

Contents

1. Before you start: the modules your business uses
2. Your requirements and where to find each one in StartERP
3. Signing in and adding your 4 users (requirement 9)
4. Customers and suppliers (1, 2, 10)
5. Quotations, orders and invoices (3, 4, 11)
6. Products, stock, low-stock alerts and stock value (5, 23)
7. Purchase orders and purchases (6)
8. Payments, receivables and what you owe (7, 8)
9. Sales team and commissions (12 to 17)
10. Expenses, accounting and financial reports (18, 19)
11. Saudi VAT and ZATCA Phase 2 (20)
12. The owner's dashboard on phone and laptop (21, 22)
13. Setup, data entry and training (24, 25)

1. Before you start: the modules your business uses

Every StartERP store includes the dashboard, the POS terminal, sales and returns, quotations, purchases and suppliers, products, customers and user management. Your list also needs these add-on modules, which your StartERP contact switches on for your store:

Add-on module	What it gives you	Requirements
Sales team & commissions	A salesperson on every customer and document, salesperson reports, commission on payments received, approve and pay	10 to 17
Purchase orders	Orders to suppliers before the goods arrive, turned into purchases	6
Finance	Expenses and expense categories, capital and withdrawals	18
Accounting	Chart of accounts, ledger, journal postings and vouchers	18, 19
ZATCA e-invoicing (Phase 2)	Each invoice, return and note signed and cleared or reported to Fatoora	20
VAT return	The VAT return for each period from your sales, purchases and expenses	20
RBAC: custom roles & permissions (optional)	Your own roles when the ready-made ones (Manager, Salesman, Accountant, Cashier) are not enough	9

To see what your store has, open **Settings → Modules**.

2. Your requirements and where to find each one

#	Requirement	Where in StartERP
1	Customer management	Customers
2	Supplier management	Vendors
3	Quotations	Sales › Quotations
4	Sales orders and invoices	Sales › Sales / Orders
5	Products, inventory and stock	Products; stock is updated by every sale, return and purchase
6	Purchase orders and purchases	Purchases › Purchase orders, Purchases
7	Customer payments, receivables and balances	Payments on each invoice; Sales payments; the customer's statement of account; dashboard receivables
8	Supplier payments and balances	Payments on each purchase; Purchase payments; the vendor's statement of account
9	Separate logins and permissions for 4 users	Settings › Users (and roles)
10	Customers kept by a salesperson	Customer form, field Salesperson
11	Salesperson put on quotations, orders and invoices by itself	Taken from the customer on every new document
12	Daily, weekly, monthly and yearly reports per salesperson	Sales › Sales team & commissions
13	Commission worked out by itself	Sales team & commissions › Commissions
14	Commission on payments received, in proportion for partial payments	Each payment earns its share (see the worked example)
15	Commission reports: pending, approved, paid	Commissions tab and Payouts
16	Owner sets and changes the percentages	Sales team & commissions › Rates
17	Product-wise, customer-wise and salesperson-wise sales	Sales team & commissions › By product, By customer, Salespeople; Analytics › Sales analytics
18	Expenses and accounting	Expenses; Accounts, Ledger, Journal vouchers
19	Profit and loss and financial reports	Business dashboard (profit and loss, balance sheet); Accounting › Accounts and Ledger
20	Saudi VAT 15% and ZATCA Phase 2	VAT on every document; ZATCA add-on; VAT return
21	Owner dashboard on mobile and laptop	Any browser, the Android app or the Windows app

22	Real-time overview	Business dashboard
23	Low-stock alerts and inventory valuation	Dashboard alert tiles; Products & Inventory tab (stock value)
24	Setup, configuration, testing, data entry support	The StartERP team, with Import from Excel/CSV
25	Training and handover for 4 users	The StartERP team, with the in-app Help (?) on every screen

3. Signing in and adding your users (requirement 9)

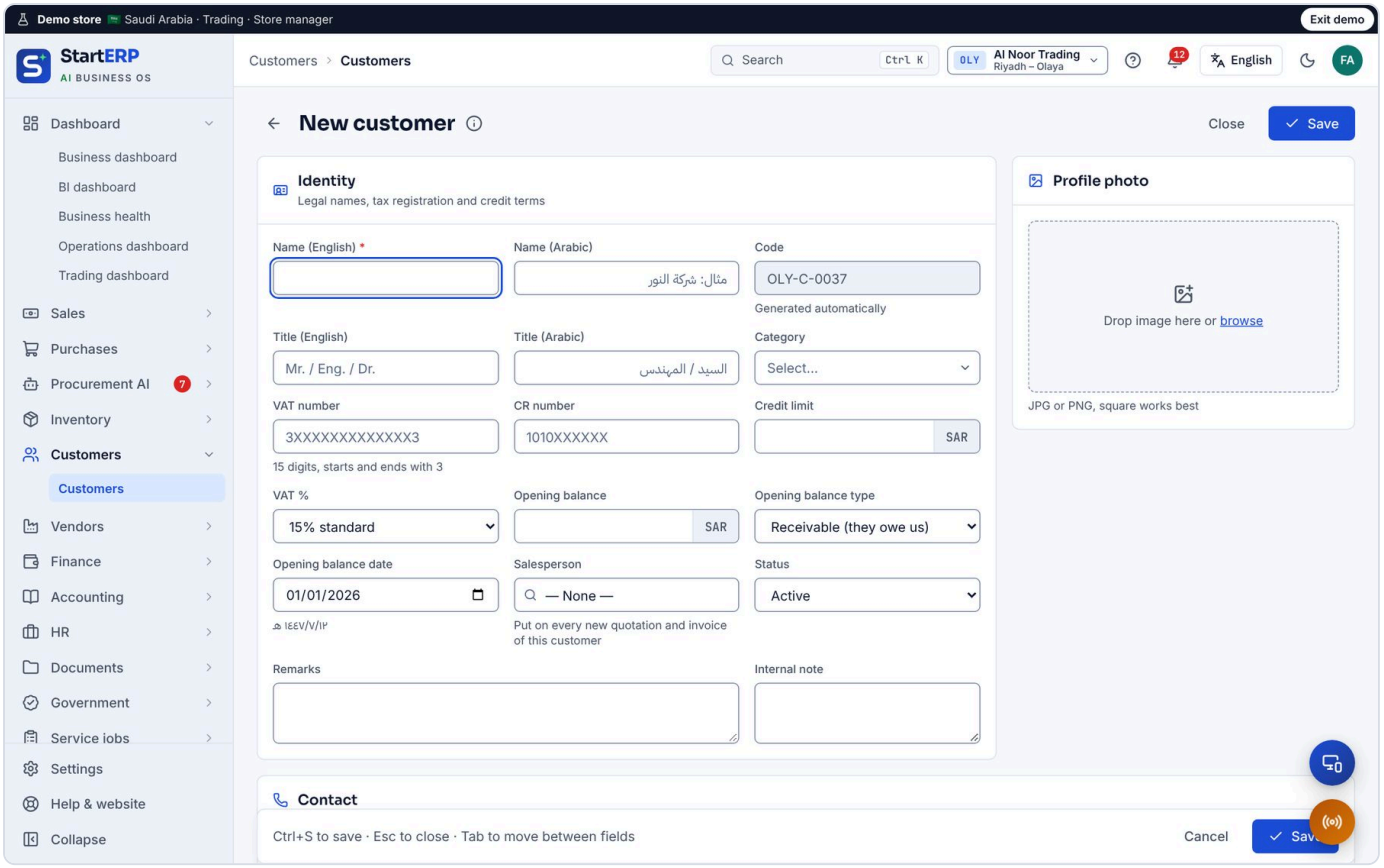
1. Open **starterp.org** on your laptop or phone and sign in with the owner's email and password.
2. Go to **Settings → Users** and press **New**.
3. Type the person's name, email and mobile, choose their store and a **role**, set a first password and save. Each person signs in with their own email and password.
4. Use the ready-made roles: **Manager** (runs the store, no settings or users), **Salesman** (quotations, invoices and customers; sees only their own commission), **Accountant** (payments, expenses, VAT and reports) and **Cashier**. With the RBAC add-on you can make your own role and tick exactly what it may see, add, edit or delete.
5. Add your salespeople as users with the **Salesman** role: they then appear in the Salesperson pickers.

> Tip: every screen has a **?** button at the top with the steps for that screen. The ⓘ beside a title explains what the screen shows.

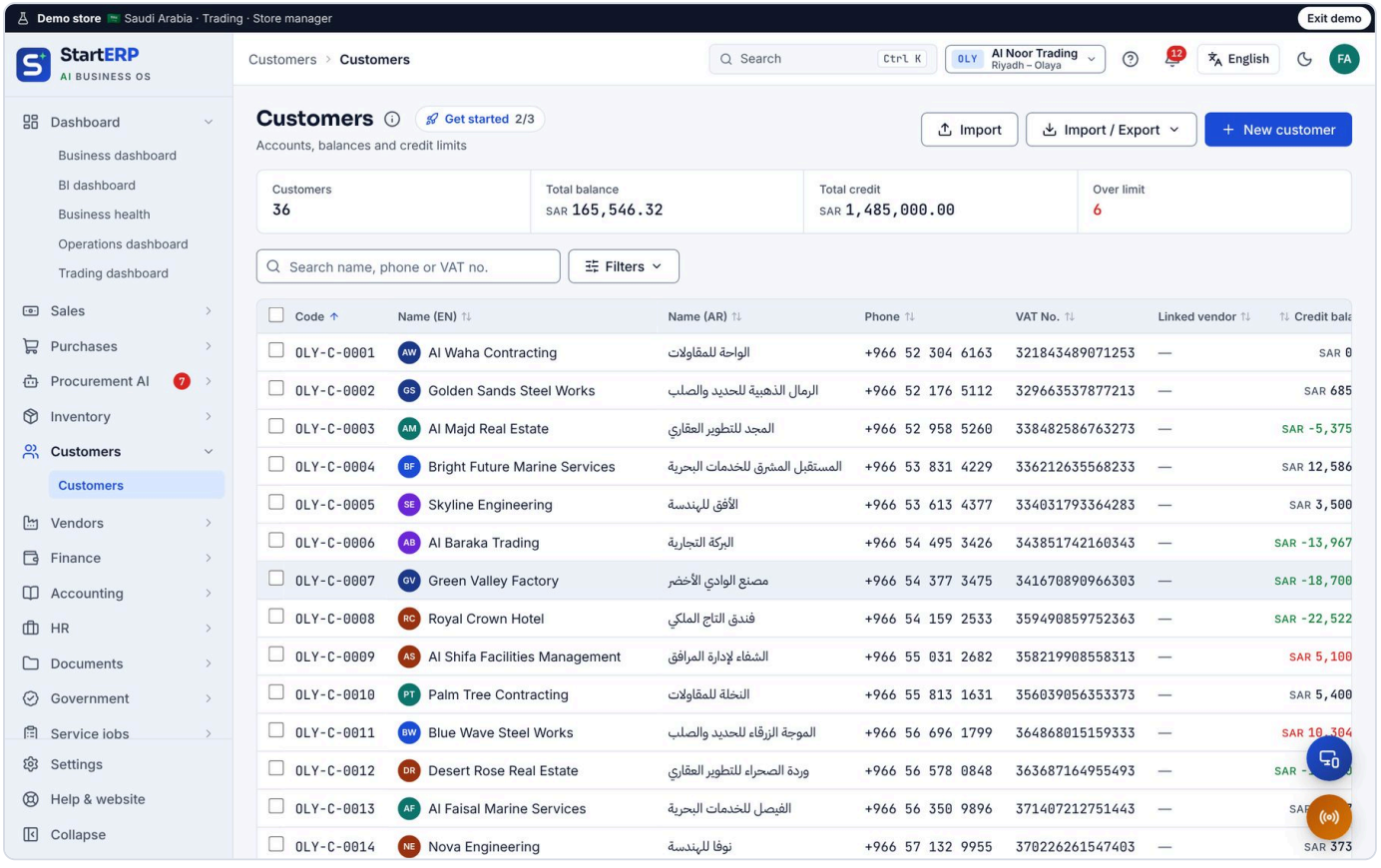
4. Customers and suppliers (requirements 1, 2 and 10)

Add a customer and give them a salesperson

1. Open **Customers** and press **New**.
2. Enter the name (English and Arabic), phone, VAT number, CR number and the national address. A B2B customer with a VAT number and full address gets standard (cleared) ZATCA invoices.
3. Pick the **Salesperson** the customer belongs to. Every new quotation, order and invoice of this customer then takes that salesperson by itself.
4. Set a credit limit if you sell on credit, then save.



The customer form with the Salesperson field.

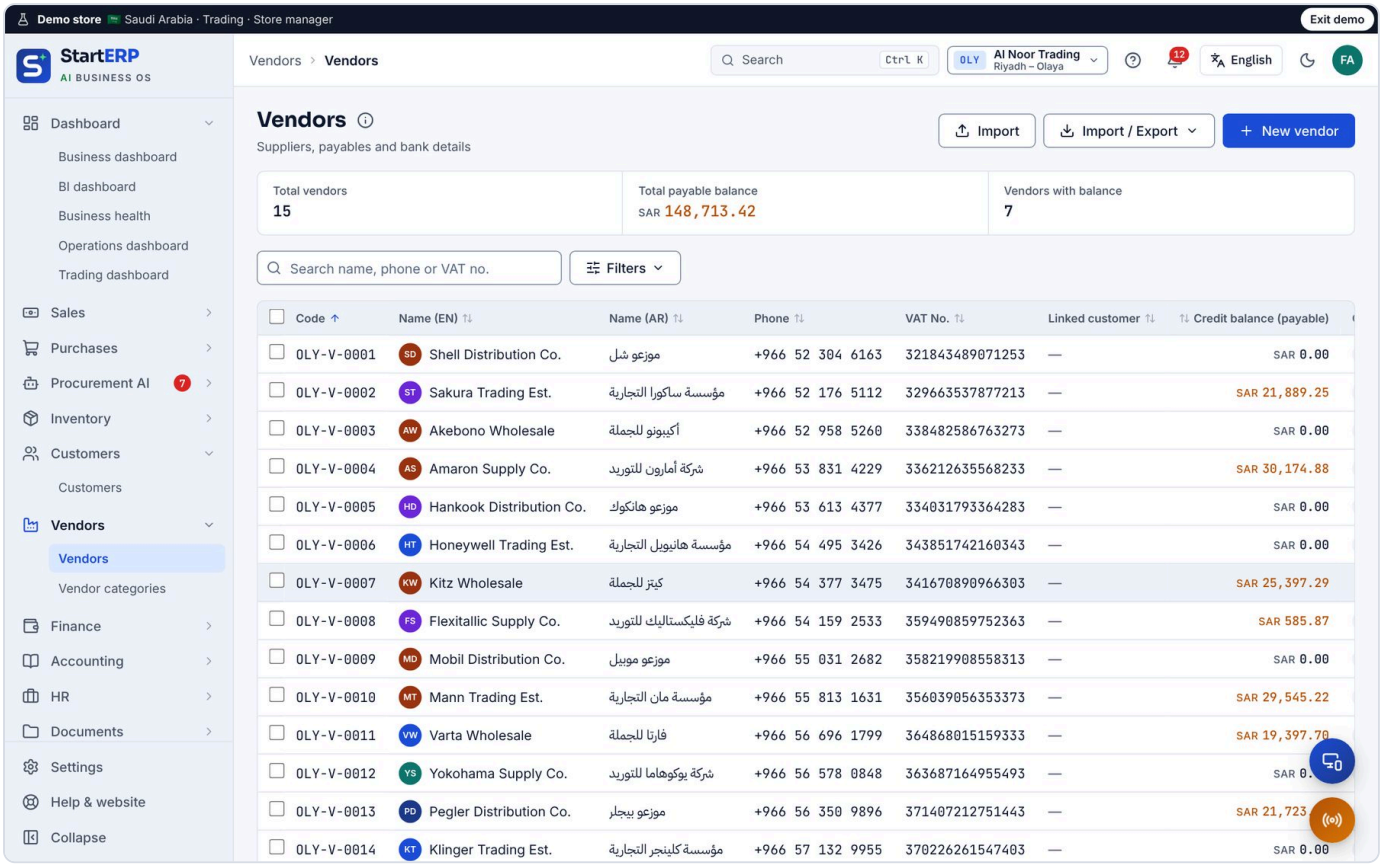


The customers list: search by name, phone or VAT number, filter by salesperson, export to Excel or CSV.

Open a customer to see their invoices, payments, balance and **Statement of account**, which you can print or send on WhatsApp. Customers can also be imported from Excel with the **Import** button on the list.

Suppliers

1. Open **Vendors** and press **New**: name, VAT number, CR number, phone and address.
2. Open a vendor to see their purchases, what you paid, what you still owe and their statement of account.

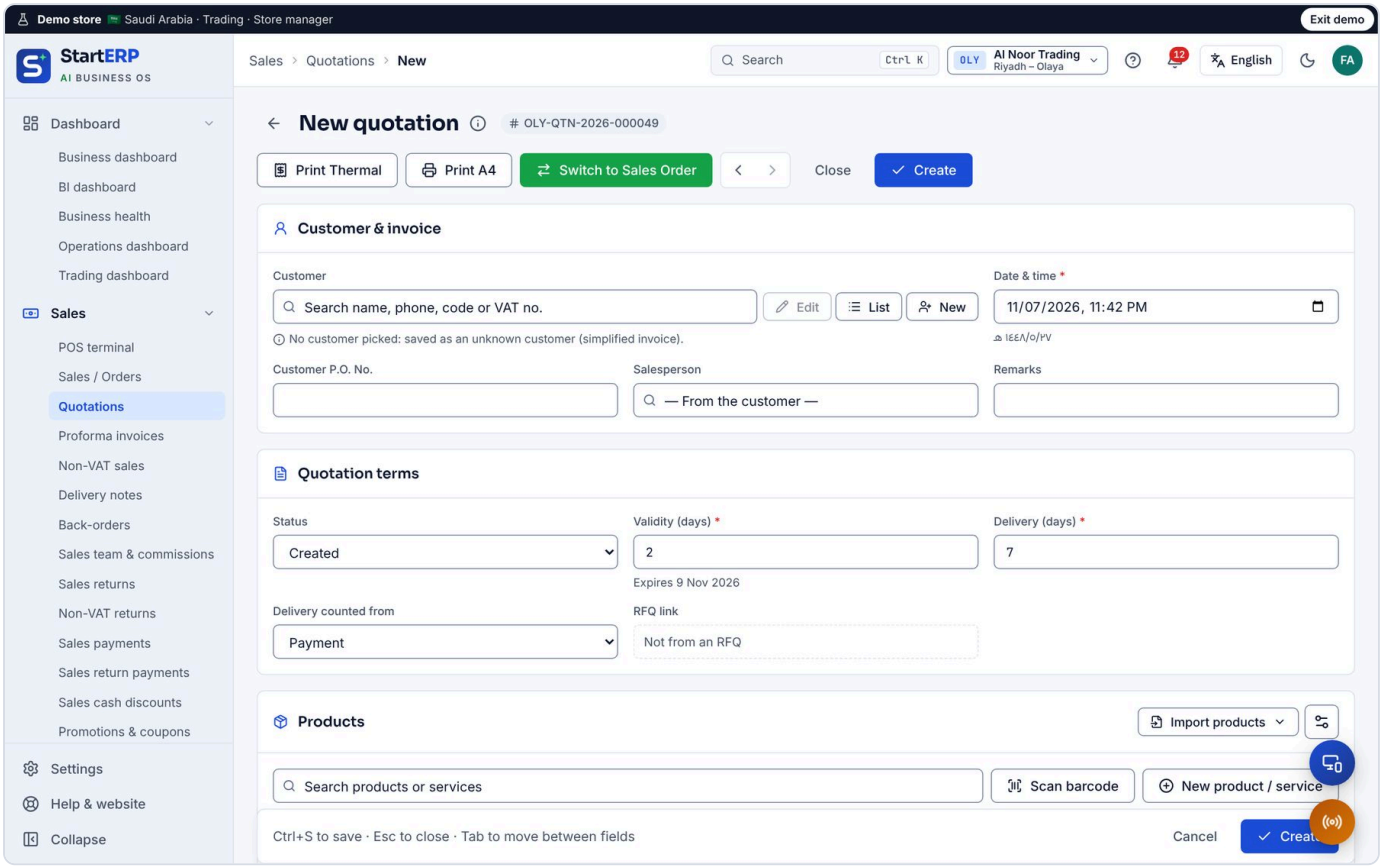


Vendors (suppliers) with what you owe each one.

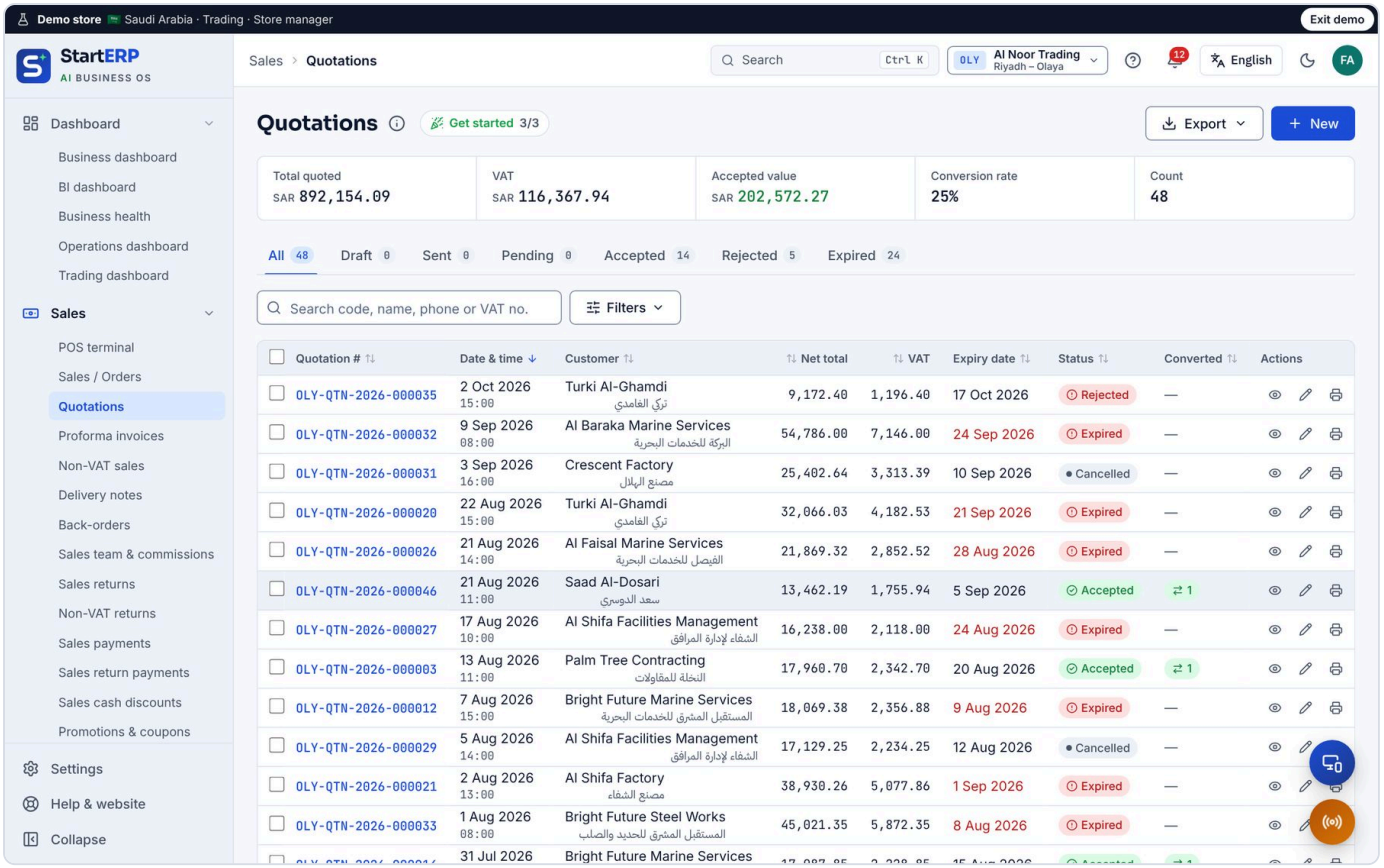
5. Quotations, orders and invoices (requirements 3, 4 and 11)

Make a quotation

1. Open **Sales › Quotations** and press **New**.
2. Pick the customer. The salesperson comes from the customer; a manager may change it on the document.
3. Add products by name, part number or barcode, with quantities and prices. VAT at 15% is worked out for each line.
4. Set the validity days and delivery days, then save. Print it on A4 with your logo or send the PDF on WhatsApp or email.
5. When the customer accepts, open the quotation and turn it into a sales invoice in one step.



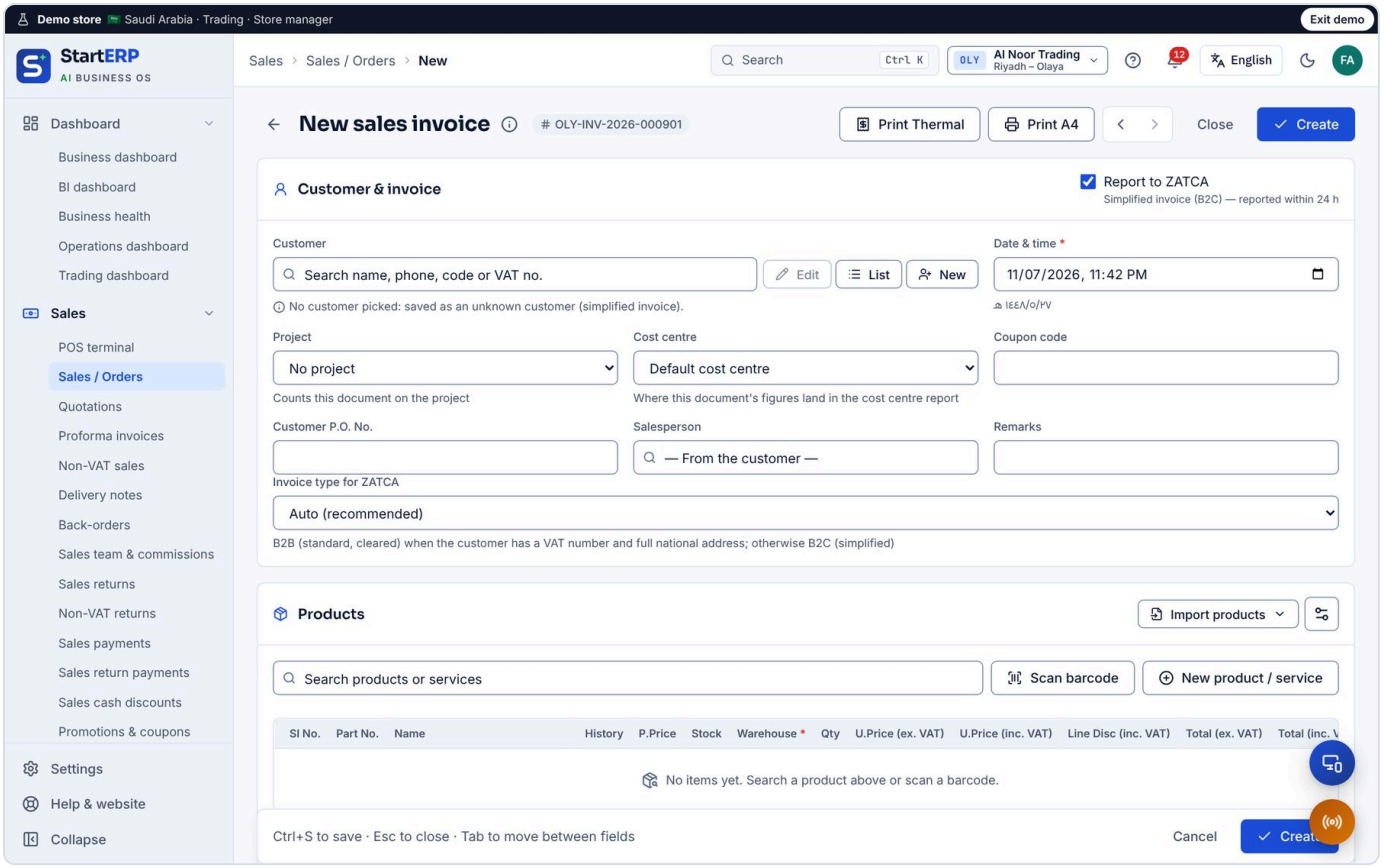
A new quotation.



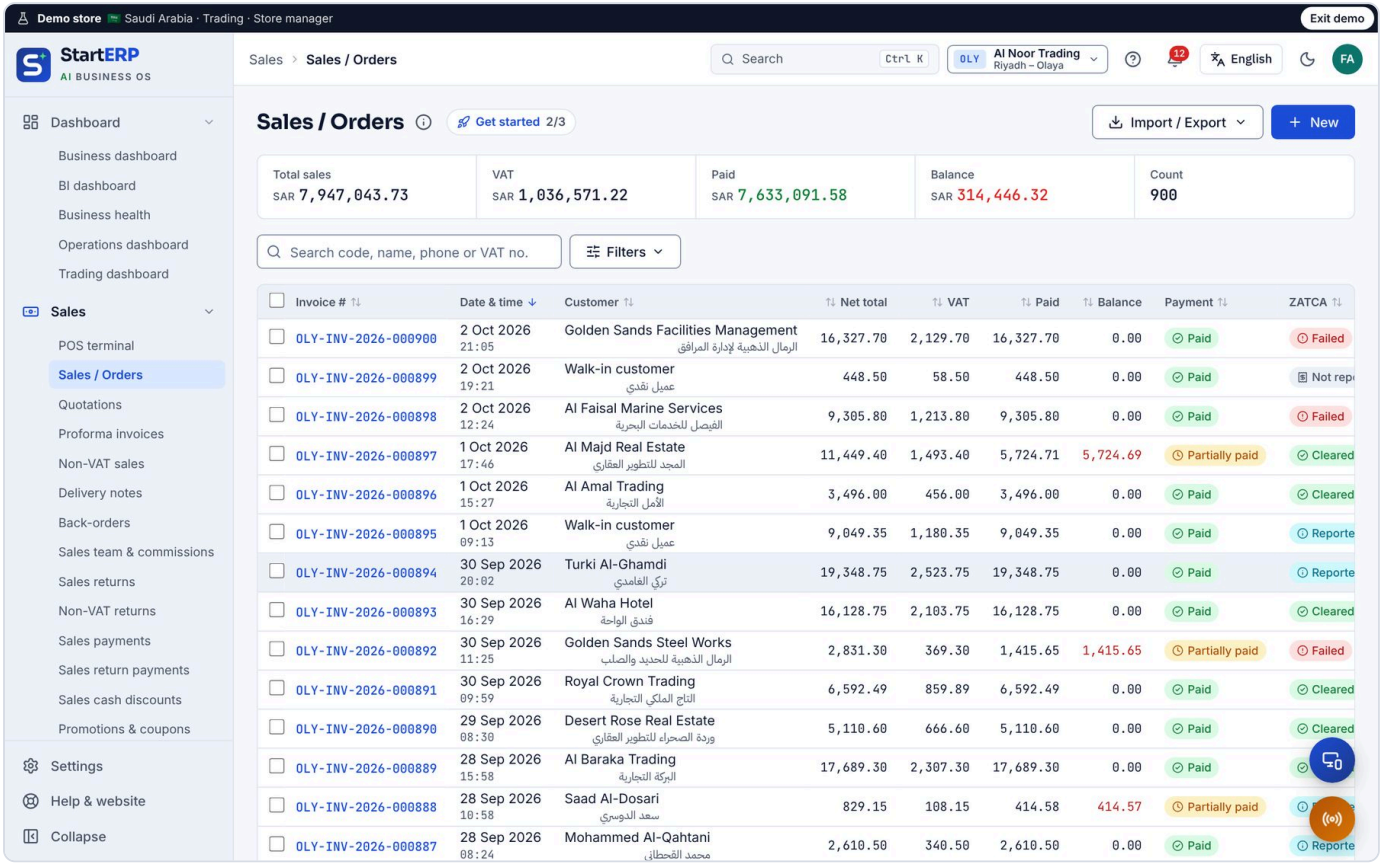
Quotations with their status and value.

Make a sales invoice

1. Open **Sales › Sales / Orders** and press **New** (or use the POS terminal for counter sales).
2. Pick the customer: the **Salesperson** field shows "From the customer" and is filled when you save.
3. Add the products and the warehouse they leave from, check the prices and VAT.
4. Record any payment received now (cash, card, bank transfer) or leave it on credit, then press **Create**. Stock goes down and the invoice is sent to ZATCA.
5. Print it (A4 or thermal) or share it. A return is made from the invoice in **Sales returns** and takes the invoice's salesperson.



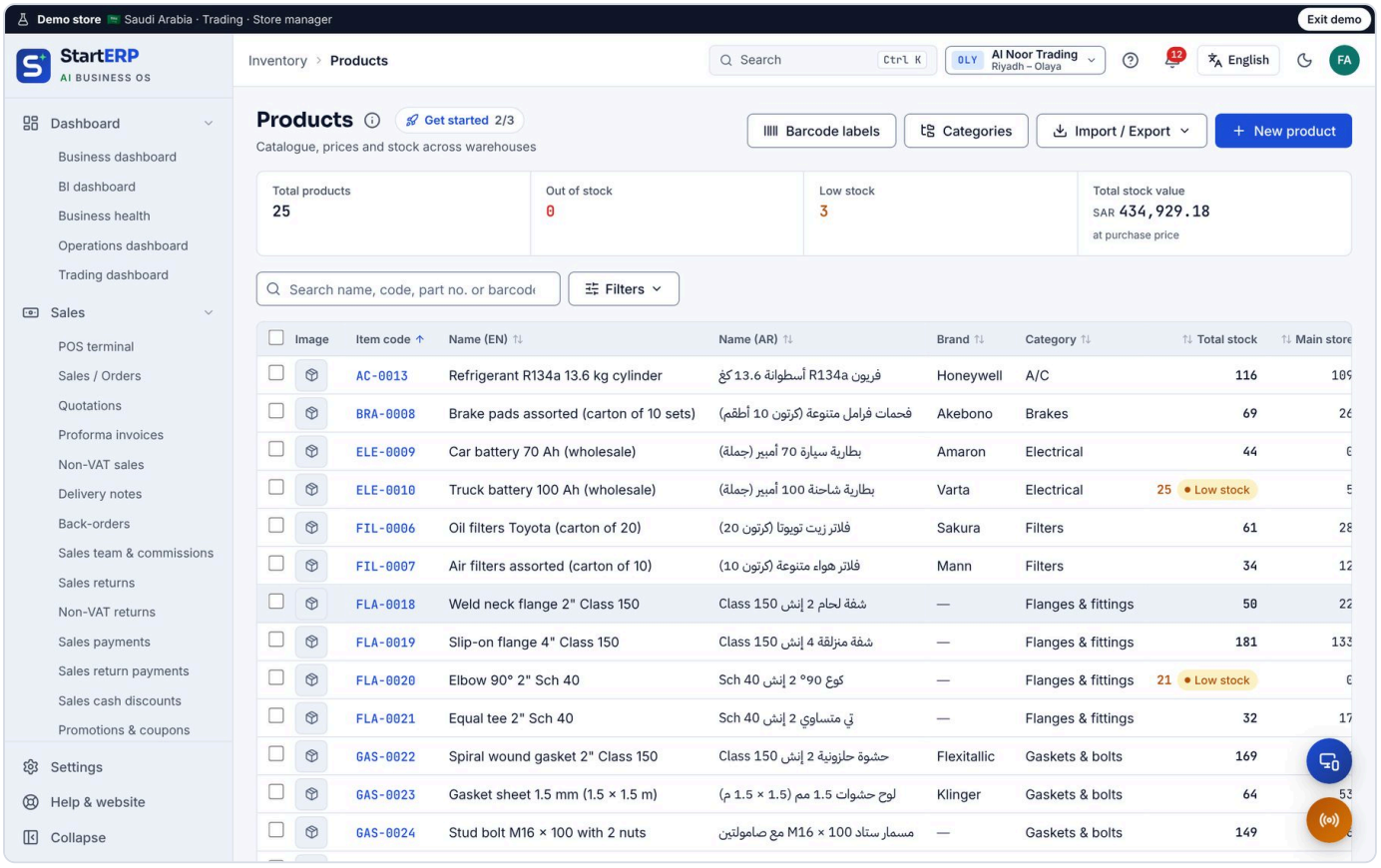
A new sales invoice with the Salesperson taken from the customer.



Sales invoices: paid, partly paid and unpaid at a glance.

6. Products, stock, low-stock alerts and stock value (requirements 5 and 23)

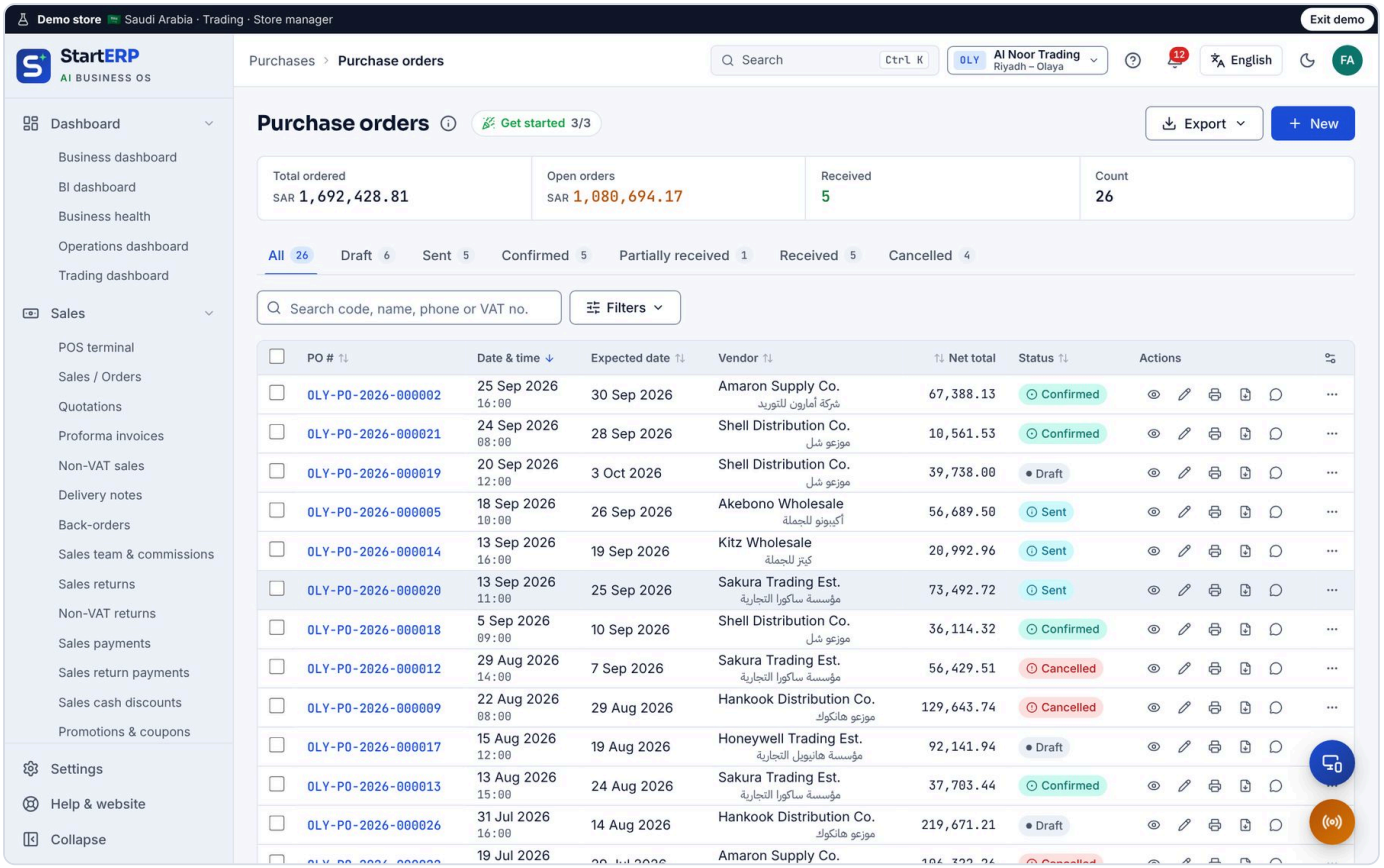
1. Open **Products** and press **New**: name, part number or barcode, unit, purchase price, selling price, VAT and the minimum stock level. Many products can be imported from Excel.
2. Stock moves by itself: a sale or a purchase return takes it out, a purchase or a sales return puts it back. Open a product to see its history and its stock in each warehouse.
3. **Low-stock alerts:** the dashboard's **Low / out of stock** tile lists every product below its minimum stock level; tap it to open the list.
4. **Inventory valuation:** the dashboard's **Products & Inventory** tab shows the stock value at cost and at selling price, and stock health.



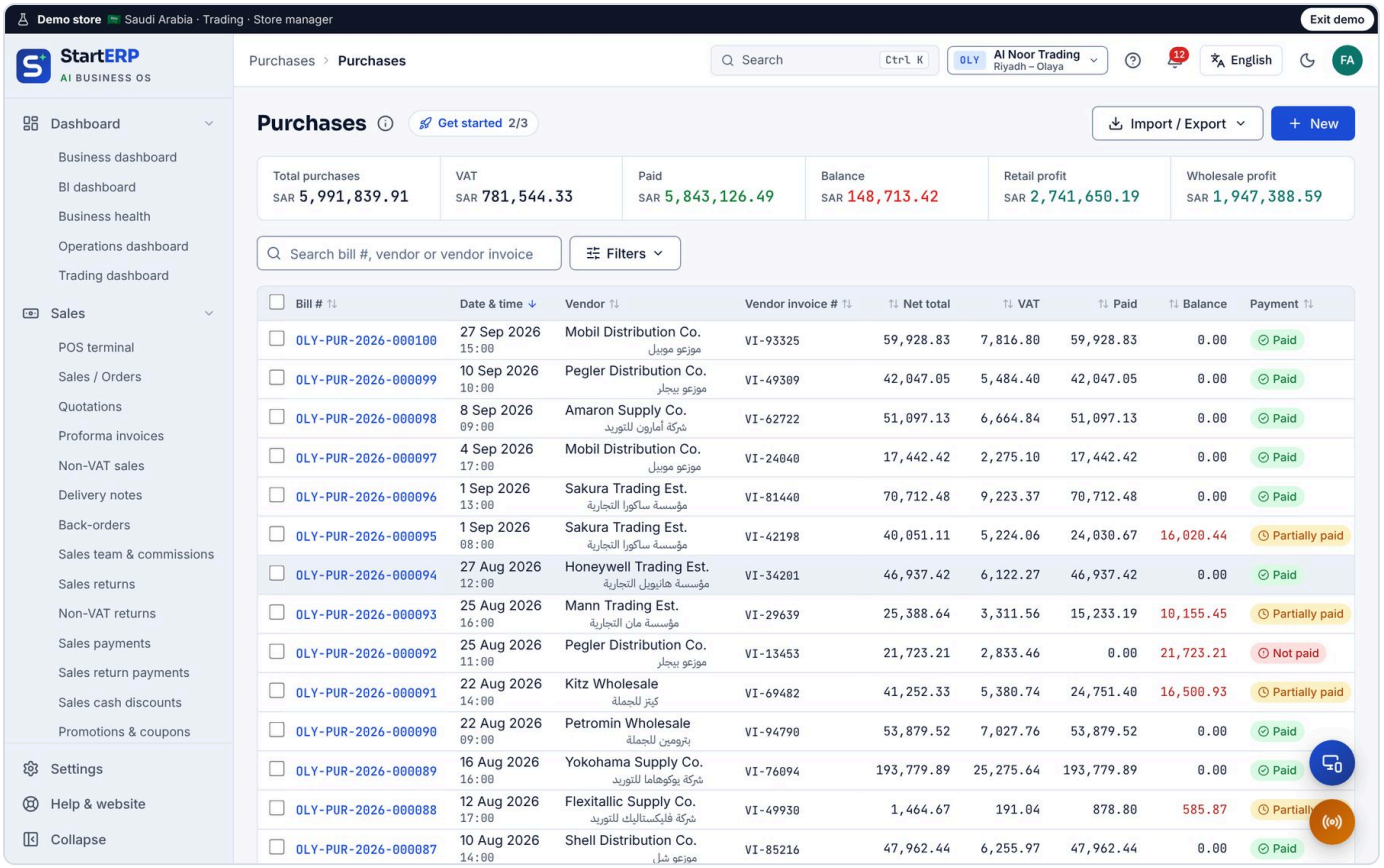
Products with stock on hand.

7. Purchase orders and purchases (requirement 6)

1. Open **Purchases › Purchase orders**, press **New**, pick the vendor and add the products and agreed prices. Send it to the supplier as a PDF.
2. When the goods arrive, turn the order into a **purchase**: the stock goes up and the average cost is updated.
3. Record what you paid on the purchase, or leave it owing. A purchase return sends goods back and lowers the stock.



Purchase orders.

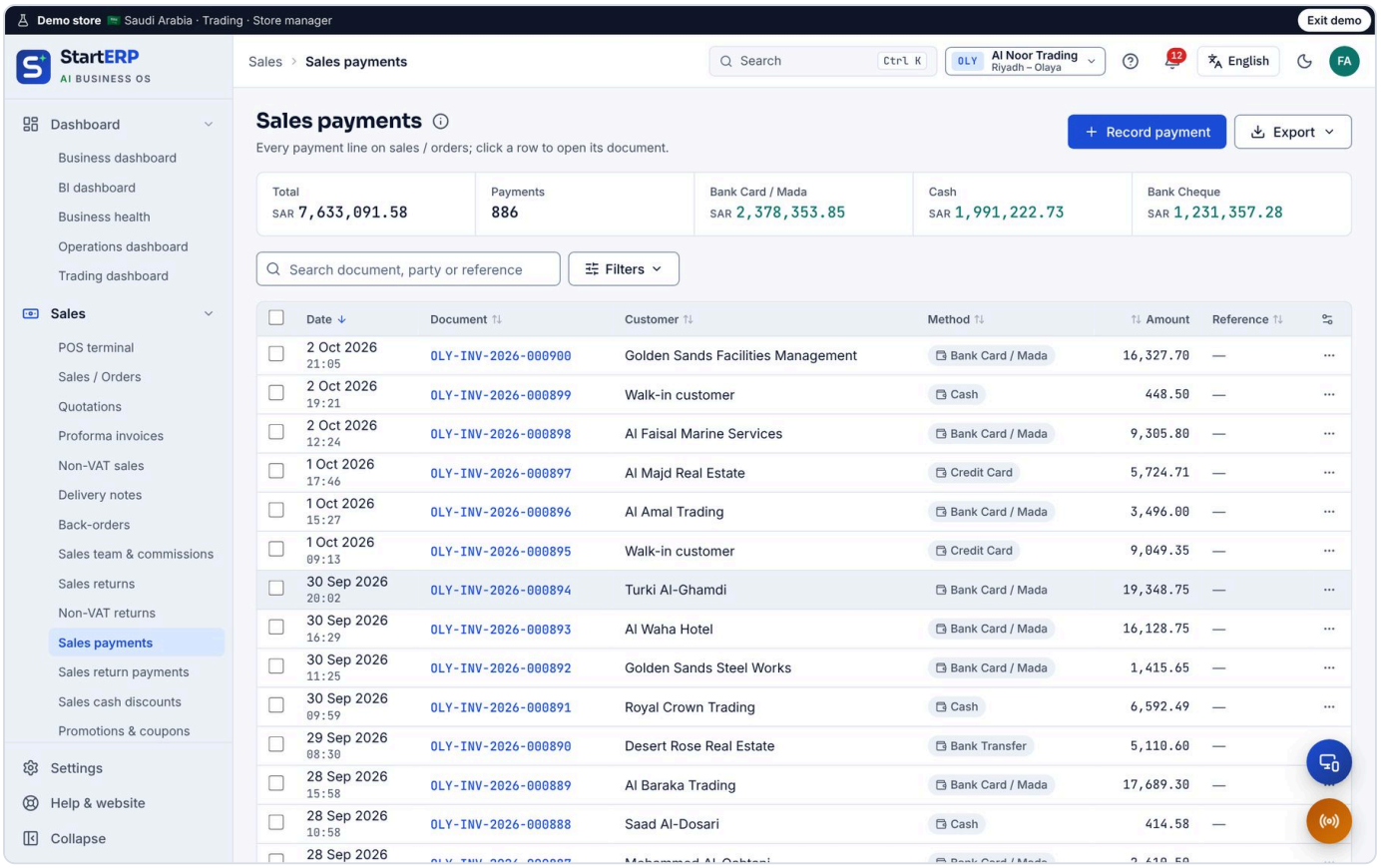


Purchases with what is paid and what is owed.

8. Payments, receivables and what you owe (requirements 7 and 8)

Money from customers

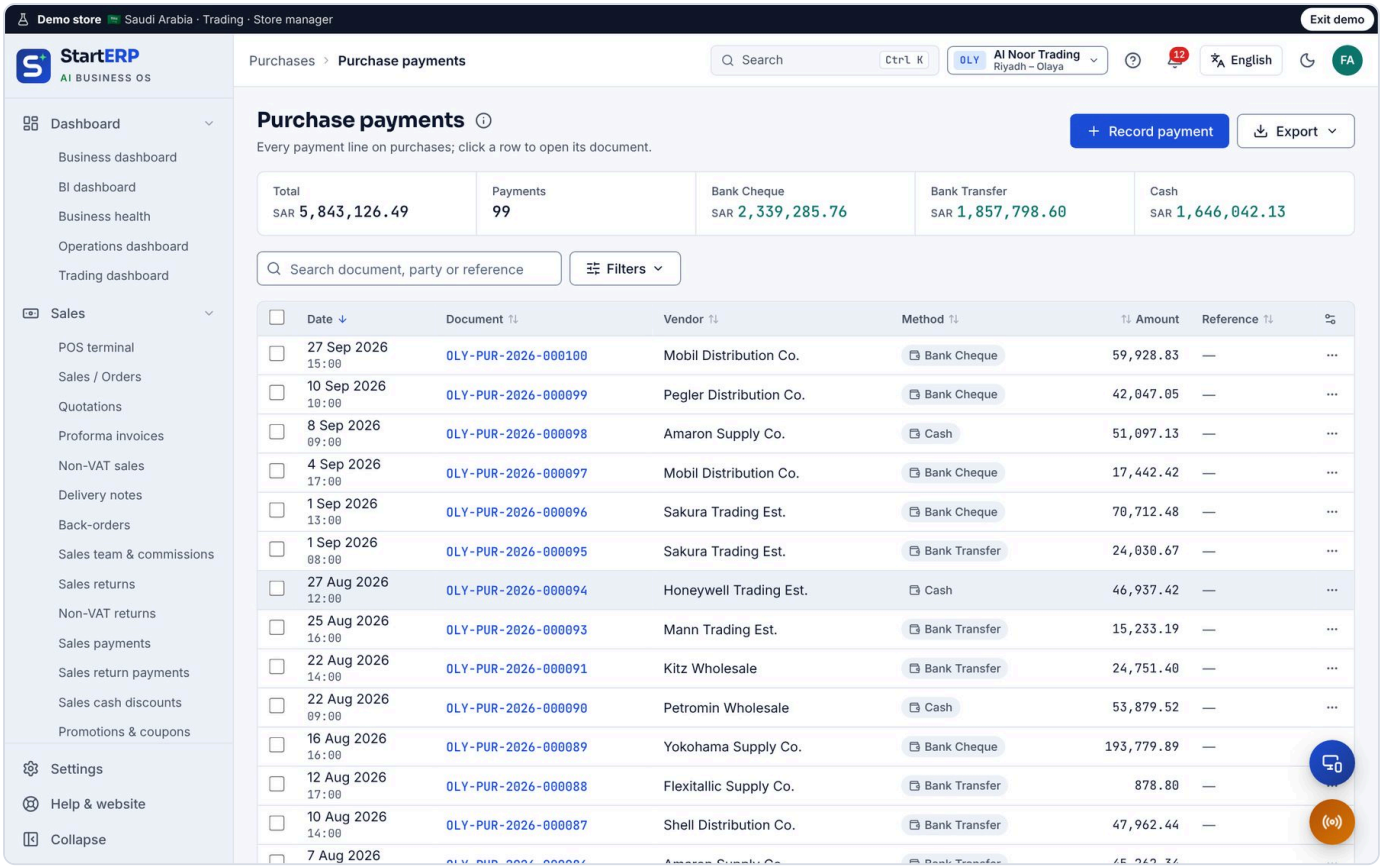
1. Record a payment on the invoice itself (the Payments section), or in **Sales › Sales payments** with **New**: pick the invoice, the amount, the date and the method.
2. A partial payment leaves the rest as the invoice's balance. The invoice shows as Paid, Partly paid or Unpaid.
3. See who owes you: the customer's balance and statement of account, and **Outstanding receivables** on the dashboard's Customers & Finance tab (with overdue invoices).



Customer payments received.

Money to suppliers

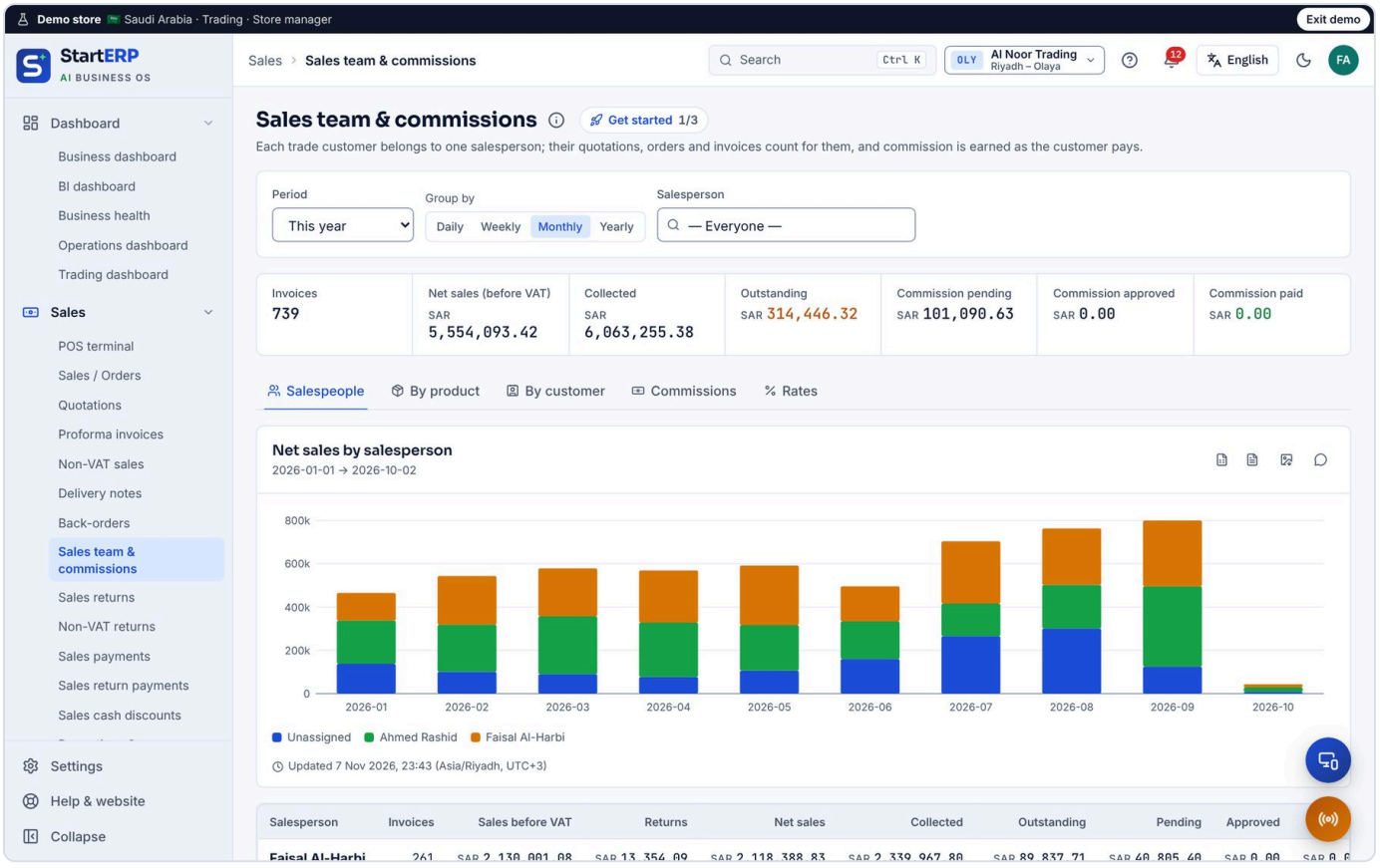
1. Record a payment on the purchase, or in **Purchases › Purchase payments**.
2. Each vendor's balance and statement of account show what you still owe.



Payments made to suppliers.

9. Sales team and commissions (requirements 10 to 17)

Open **Sales › Sales team & commissions**. Pick the period (today, this week, this month, this year or your own days), group it **Daily**, **Weekly**, **Monthly** or **Yearly**, and pick one salesperson or everyone. The cards show invoices, net sales before VAT, money collected, what is still outstanding and commission pending, approved and paid.



Net sales by salesperson, month by month, and each salesperson's figures.

> A user with the **Salesman** role sees only their own sales and commission on this screen.

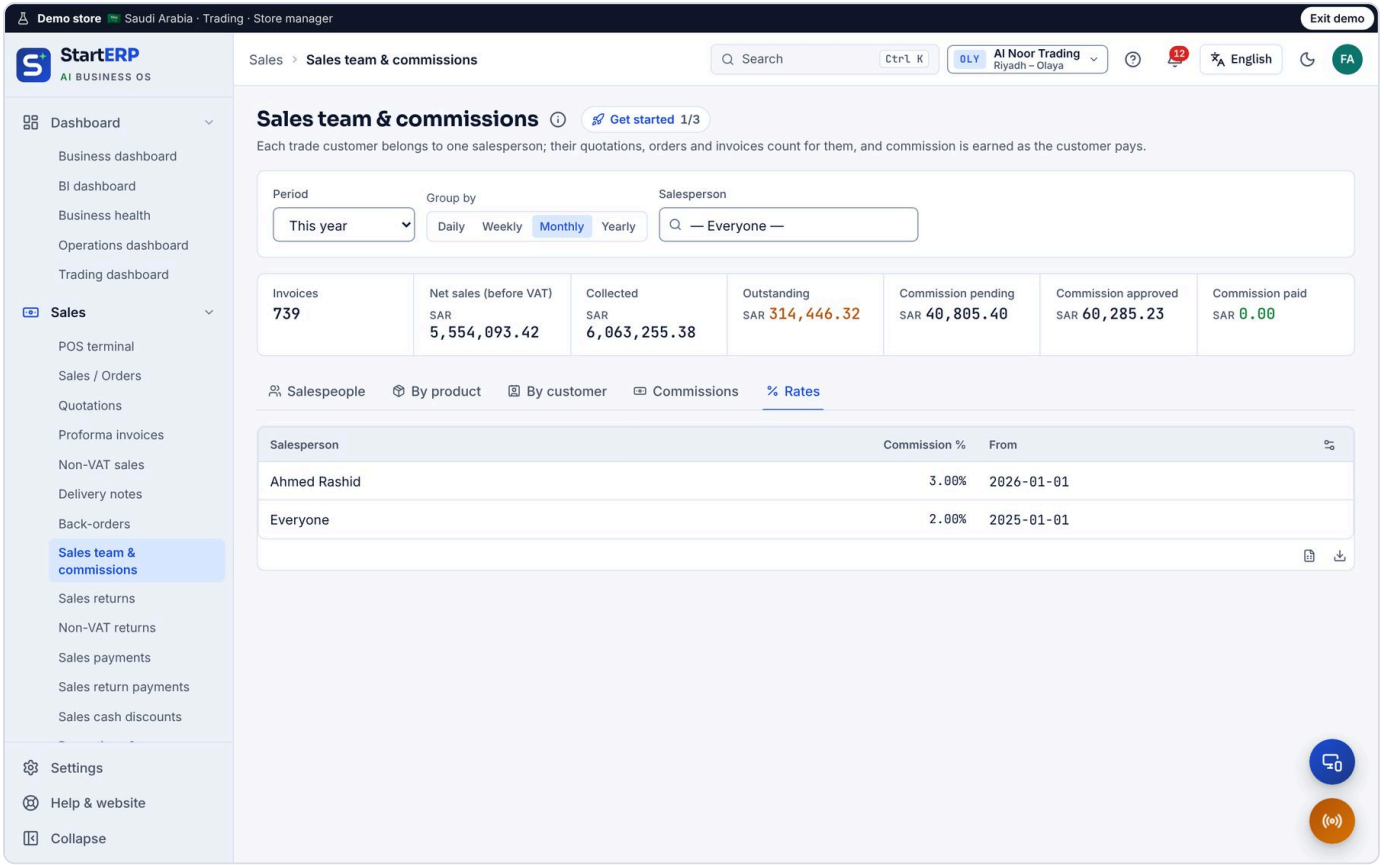
How commission is worked out (requirements 13 and 14)

Commission is earned on the money customers actually pay, not on the invoice. Each payment earns its share of the invoice before VAT, at the salesperson's rate on the day of the payment:

> **Commission = payment received × (invoice before VAT ÷ invoice with VAT) × rate**
> Example: an invoice of SAR 1,000 + 15% VAT = SAR 1,150. The customer pays SAR 400 now. At 5%: 400 × 1,000 ÷ 1,150 × 5% = **SAR 17.39** commission now. When the customer pays the remaining SAR 750, the salesperson earns the remaining SAR 32.61. If goods are returned and money refunded, the refund takes back its share.

Set the commission percentages (requirement 16)

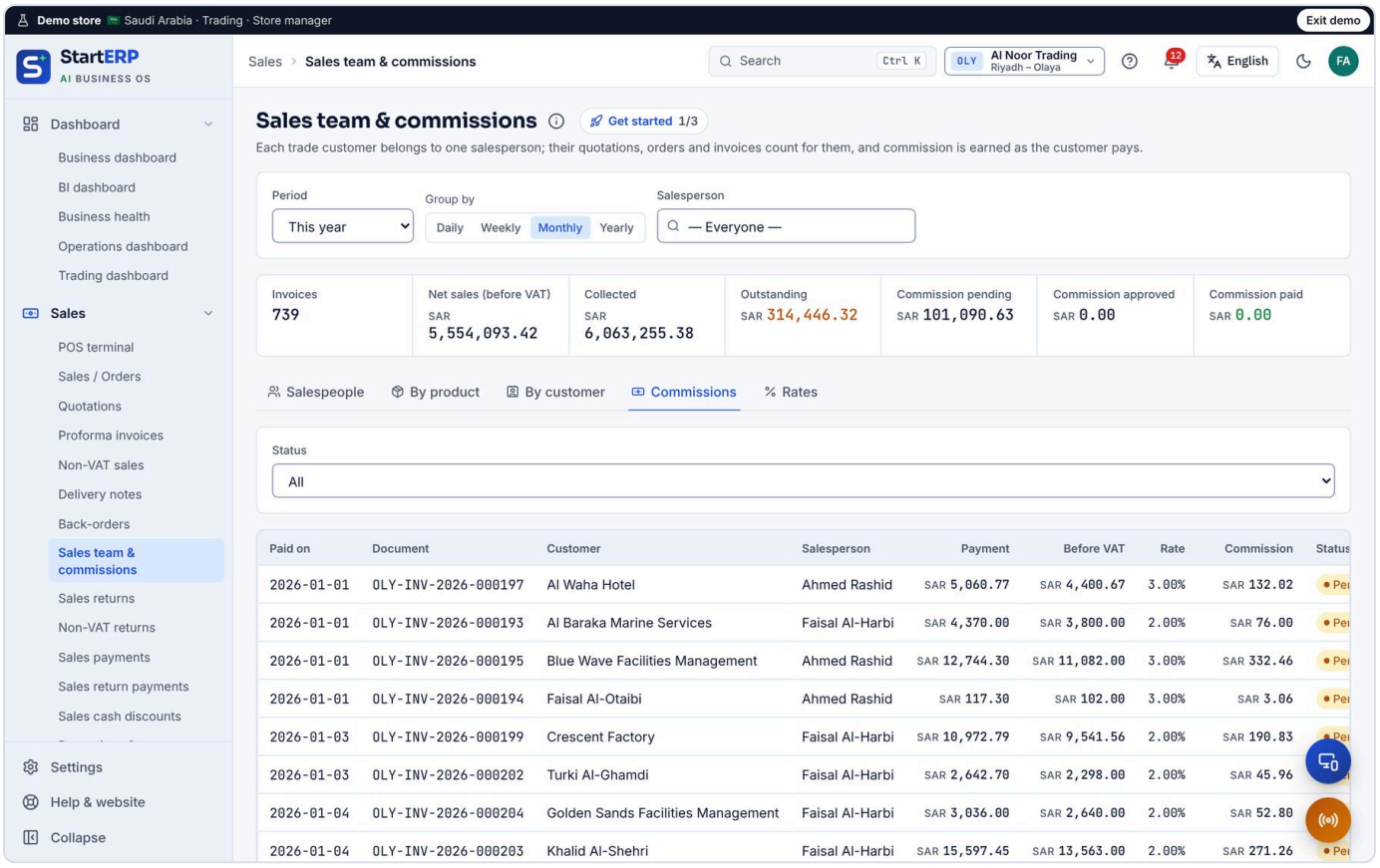
1. Open the **Rates** tab (the owner and managers with settings rights).
2. Leave the salesperson empty to set **everyone's** rate, or pick a salesperson for their own rate. Type the percent and the day it starts, then **Save rate**.
3. To change a rate, add a new one from a new day. Commission already earned keeps the rate of its day.



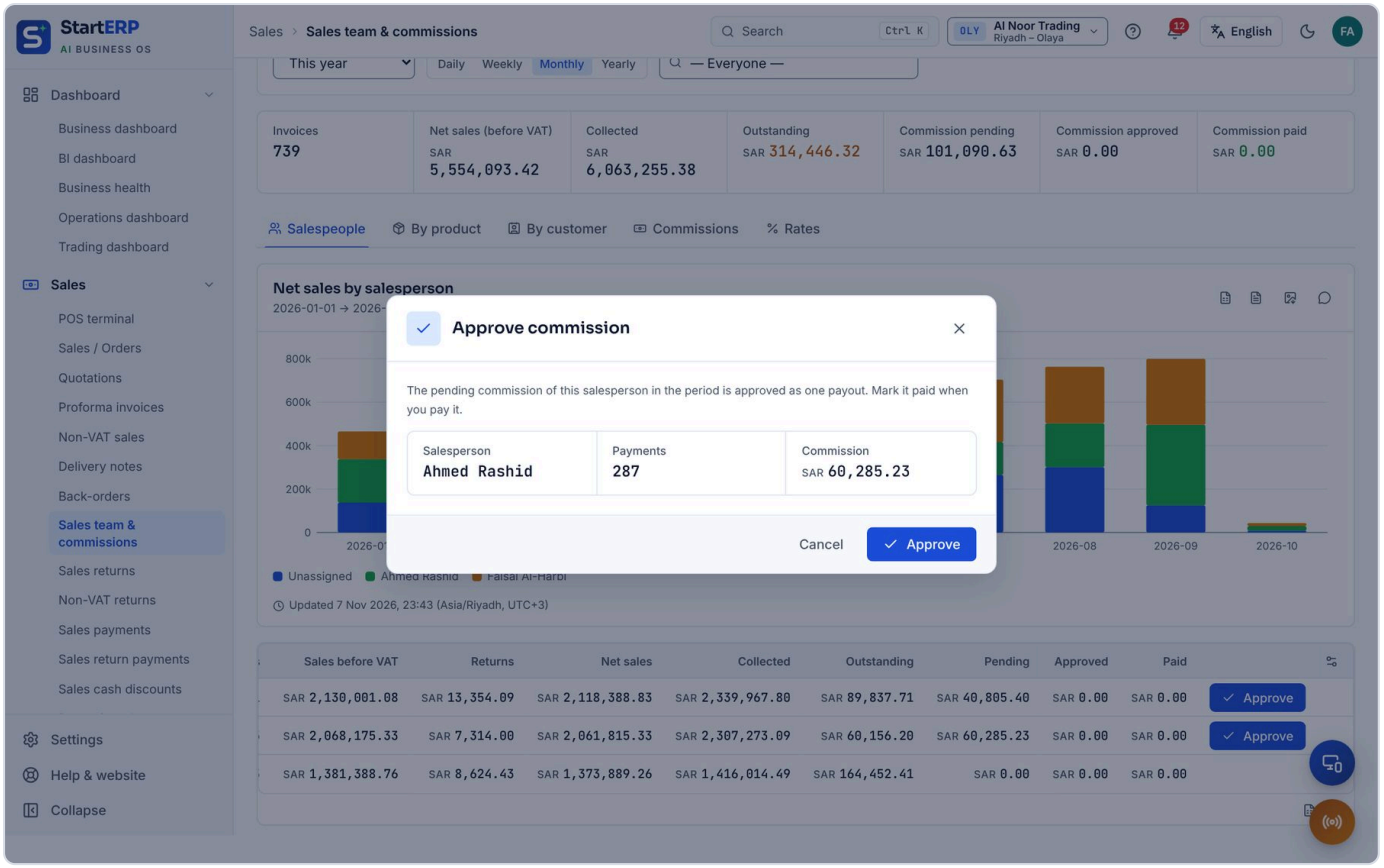
Rates: one for everyone and one for a senior salesperson.

Pending, approved and paid (requirements 13 and 15)

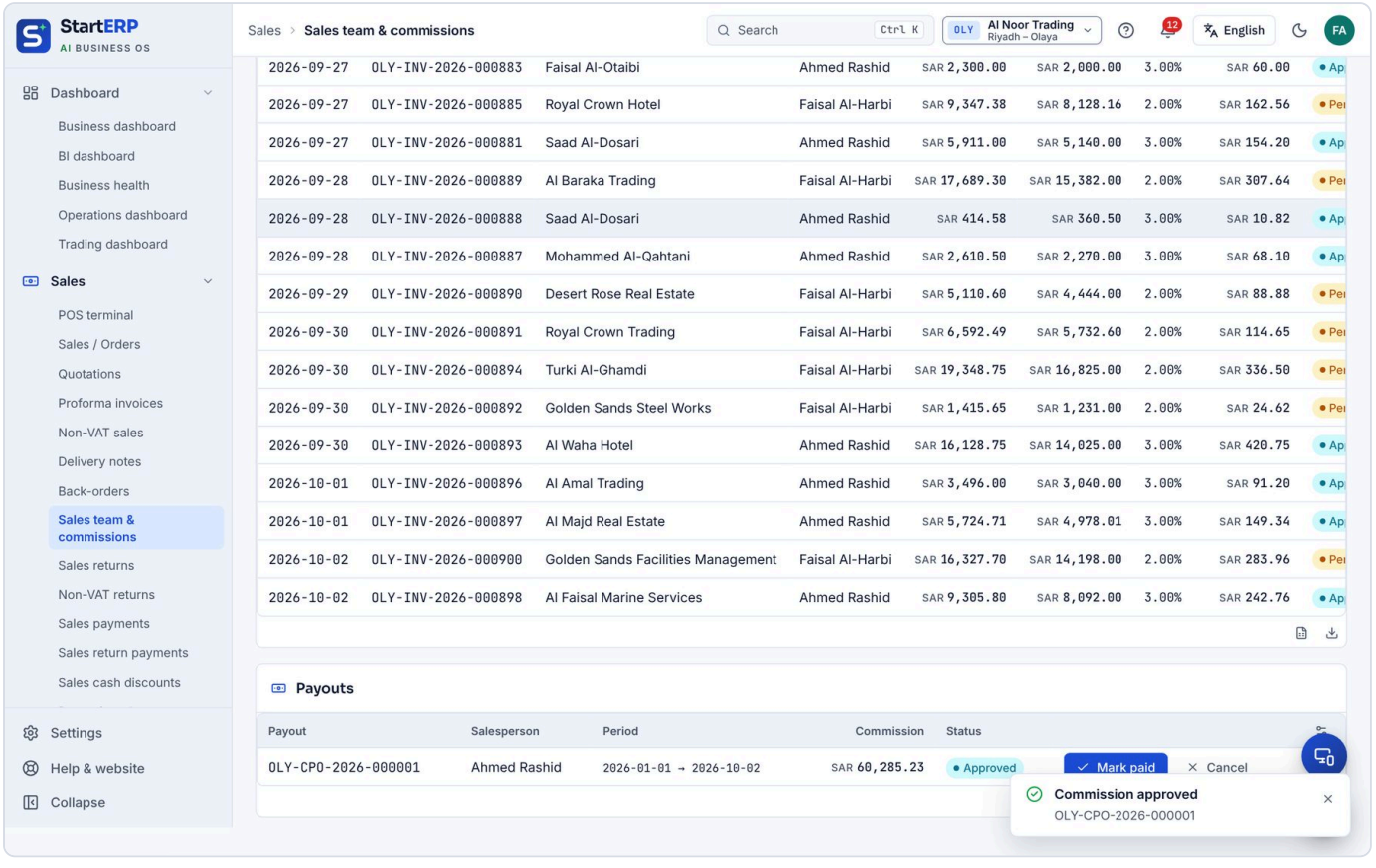
1. The **Commissions** tab lists every payment that earned commission: date, invoice, customer, salesperson, payment, amount before VAT, rate, commission and status. Filter by Pending, Approved or Paid, and export to Excel or PDF.
2. On the **Salespeople** tab, press **Approve** beside a salesperson: their pending commission in the period becomes one approved payout (CPO number).
3. When you pay it, press **Mark paid** in **Payouts** and choose bank transfer, cash or with the salary. Record the payment as an expense in the category "Sales commission" so it shows in your profit and loss.
4. An approved payout can be cancelled; its commission is then pending again. A paid payout is final.



Every commission line with its status.



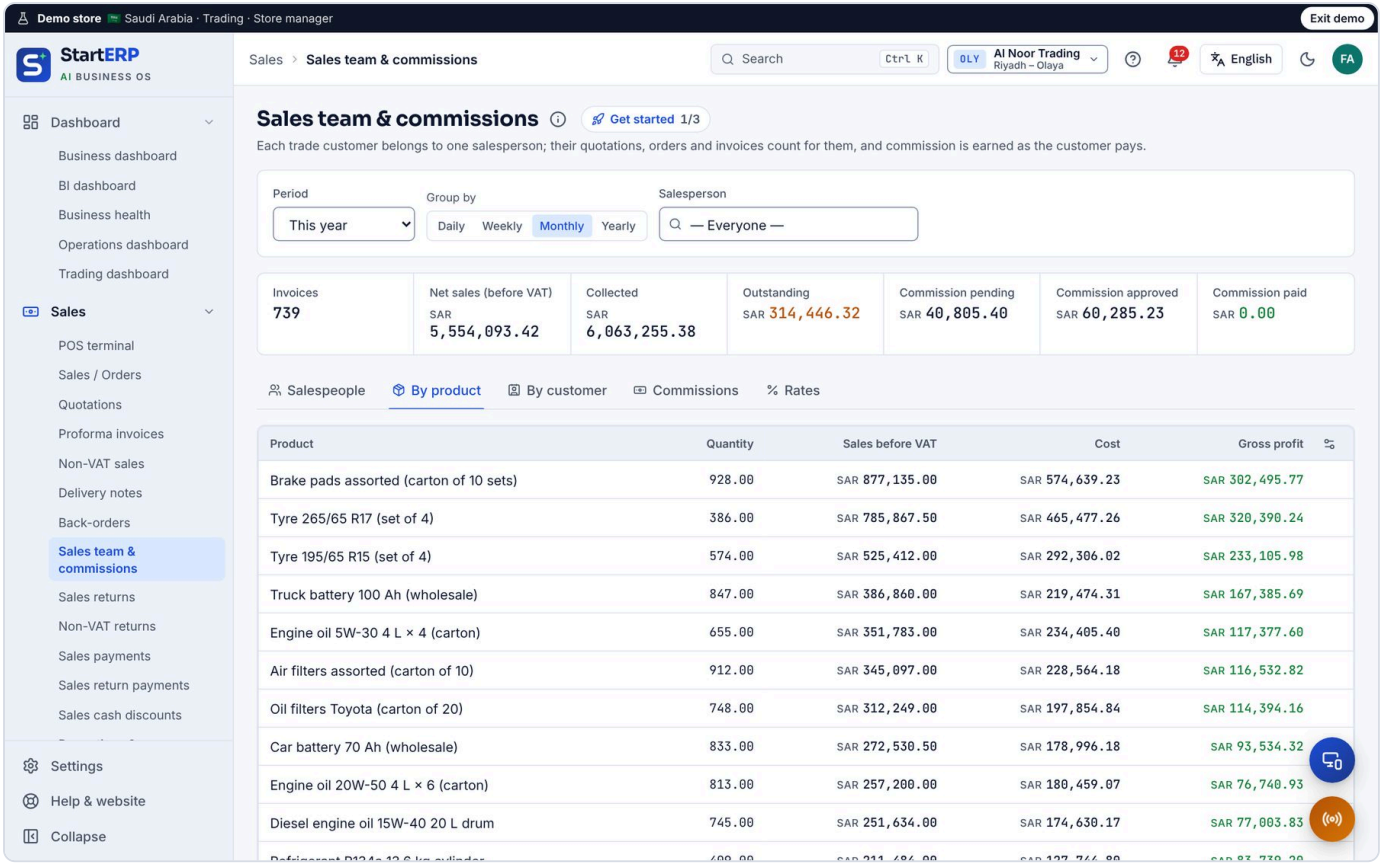
Approving a salesperson's pending commission.



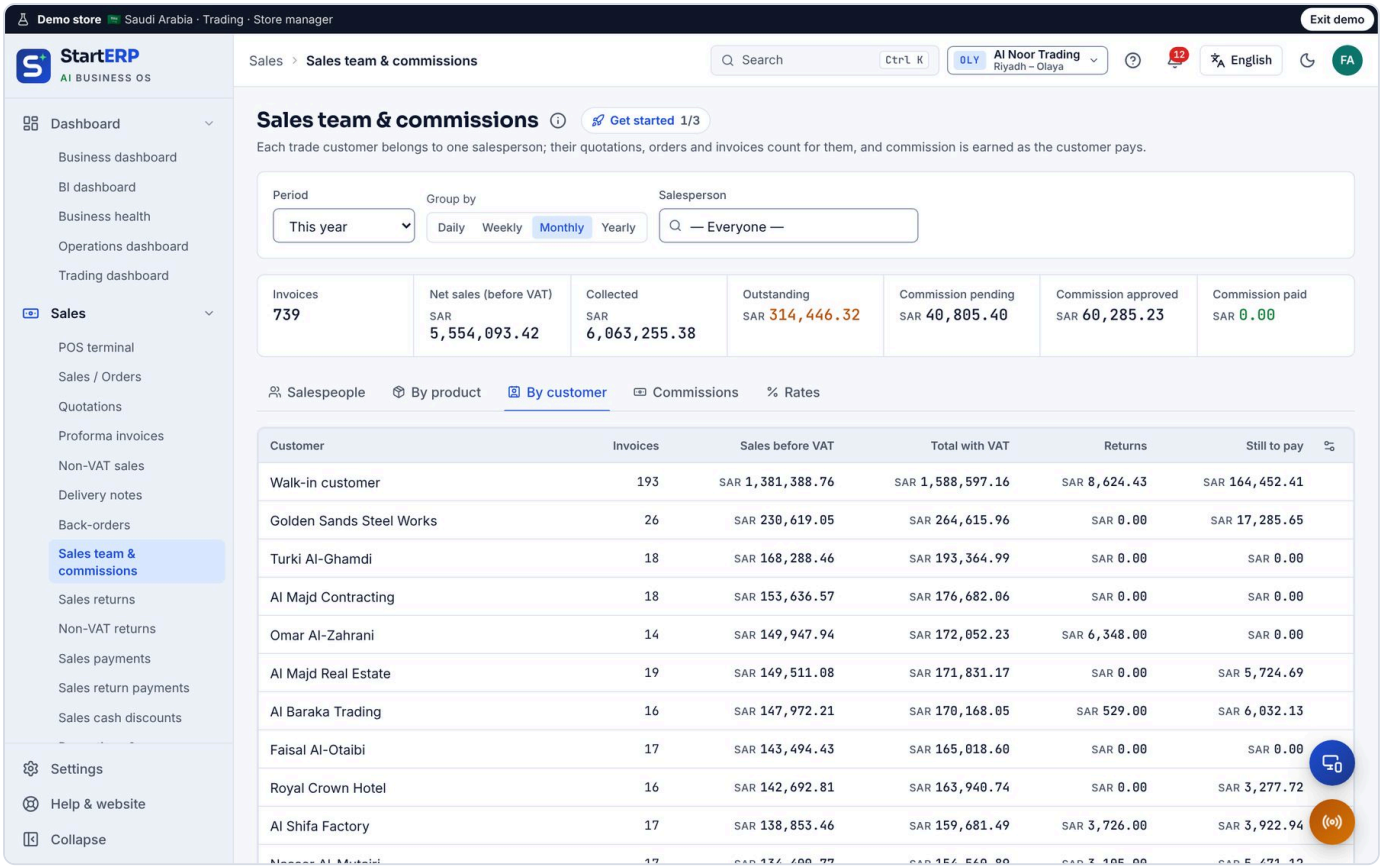
The payout, approved and ready to mark paid.

Product-wise, customer-wise and salesperson-wise sales (requirement 17)

On the same screen, **By product** shows quantity, sales before VAT, cost and gross profit per product; **By customer** shows invoices, sales, returns and what each customer still has to pay. Pick a salesperson at the top to see their products and customers only. **Analytics › Sales analytics** gives more views of the same sales.



Sales by product with gross profit.

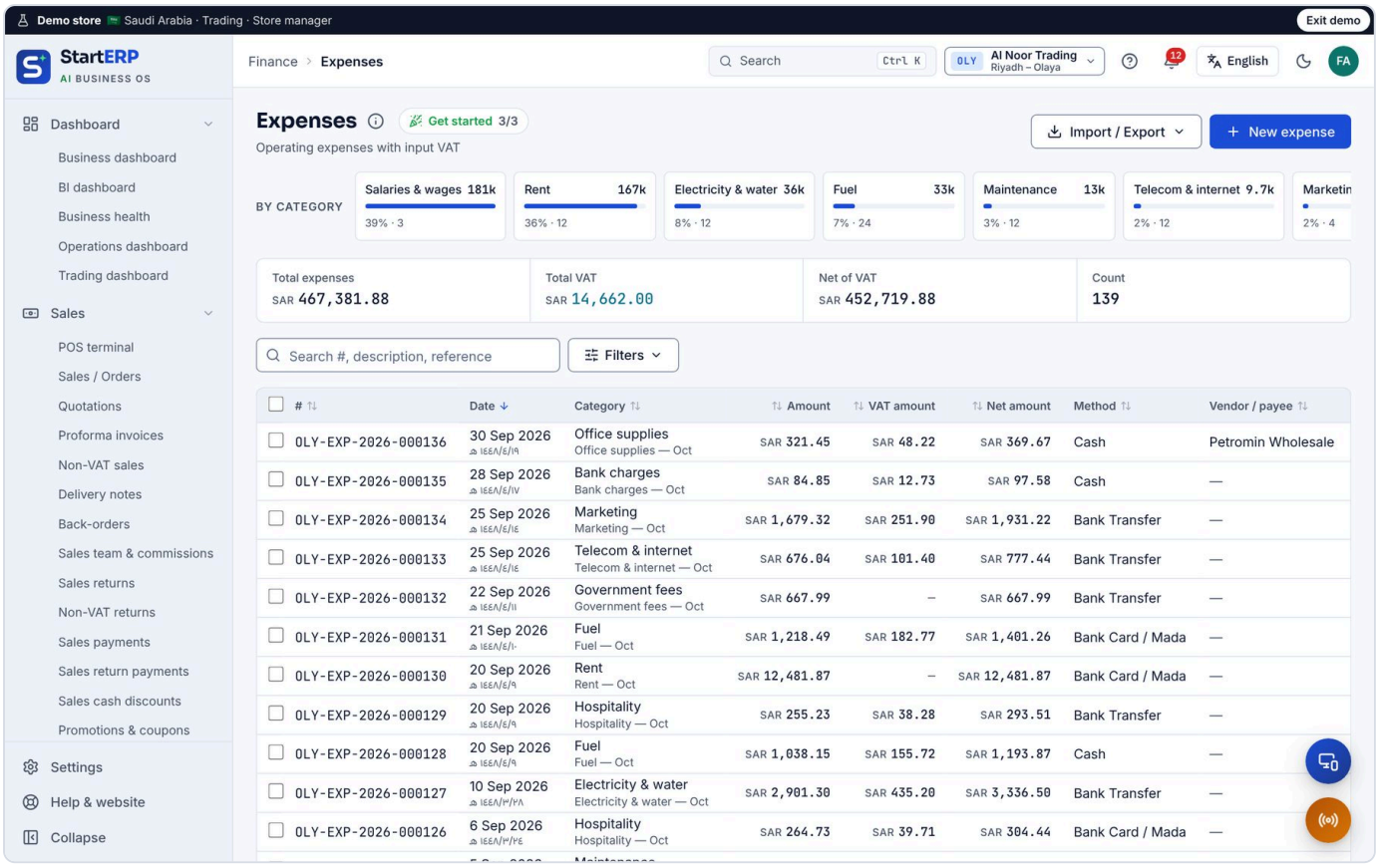


Sales by customer with what is still to pay.

10. Expenses, accounting and financial reports (requirements 18 and 19)

Expenses

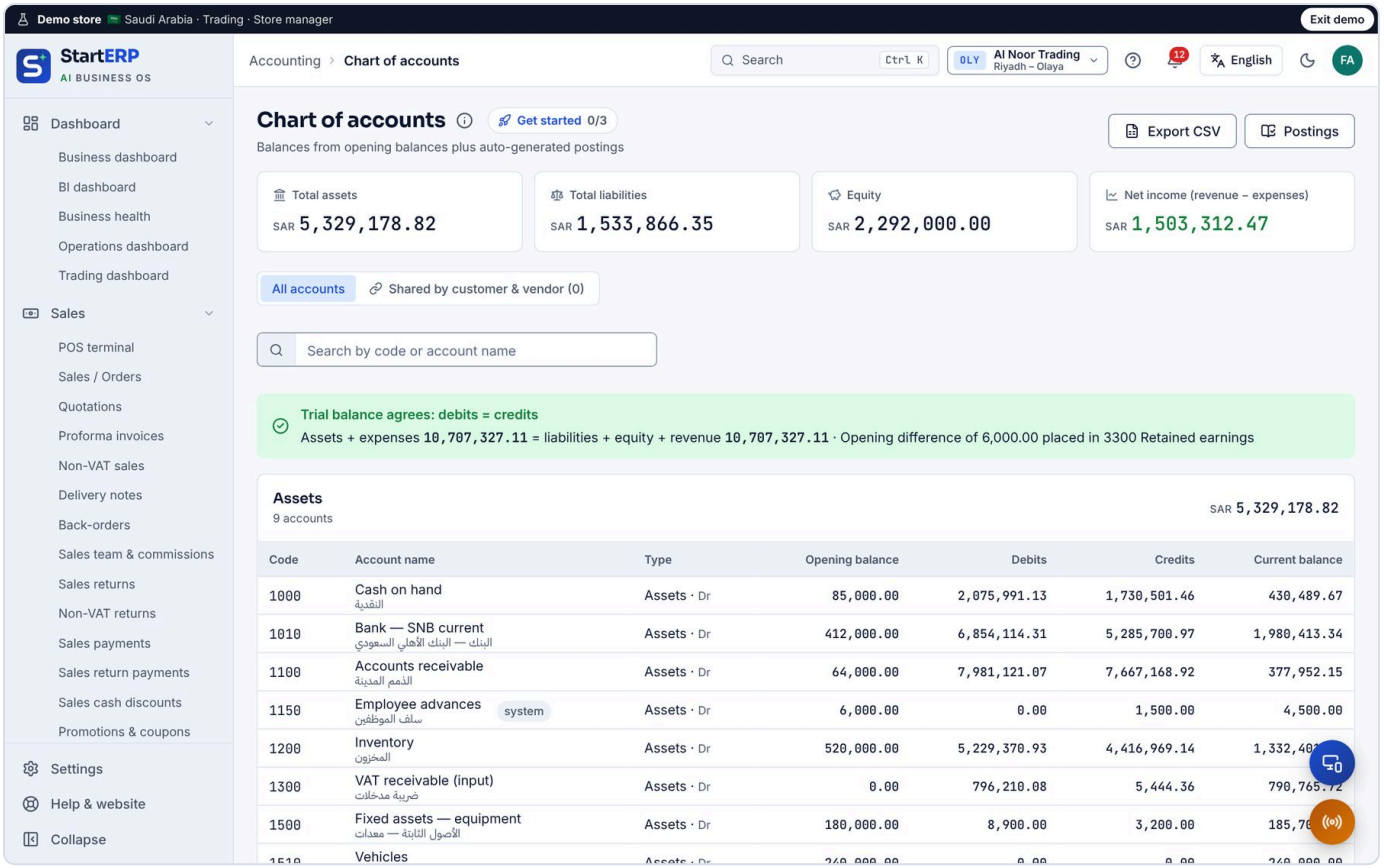
1. Open **Finance › Expenses** and press **New**: date, category (rent, salaries, fuel, sales commission...), amount, VAT and how it was paid.
2. Expense VAT is counted as input VAT in your VAT return.



Expenses by category.

Accounts and reports

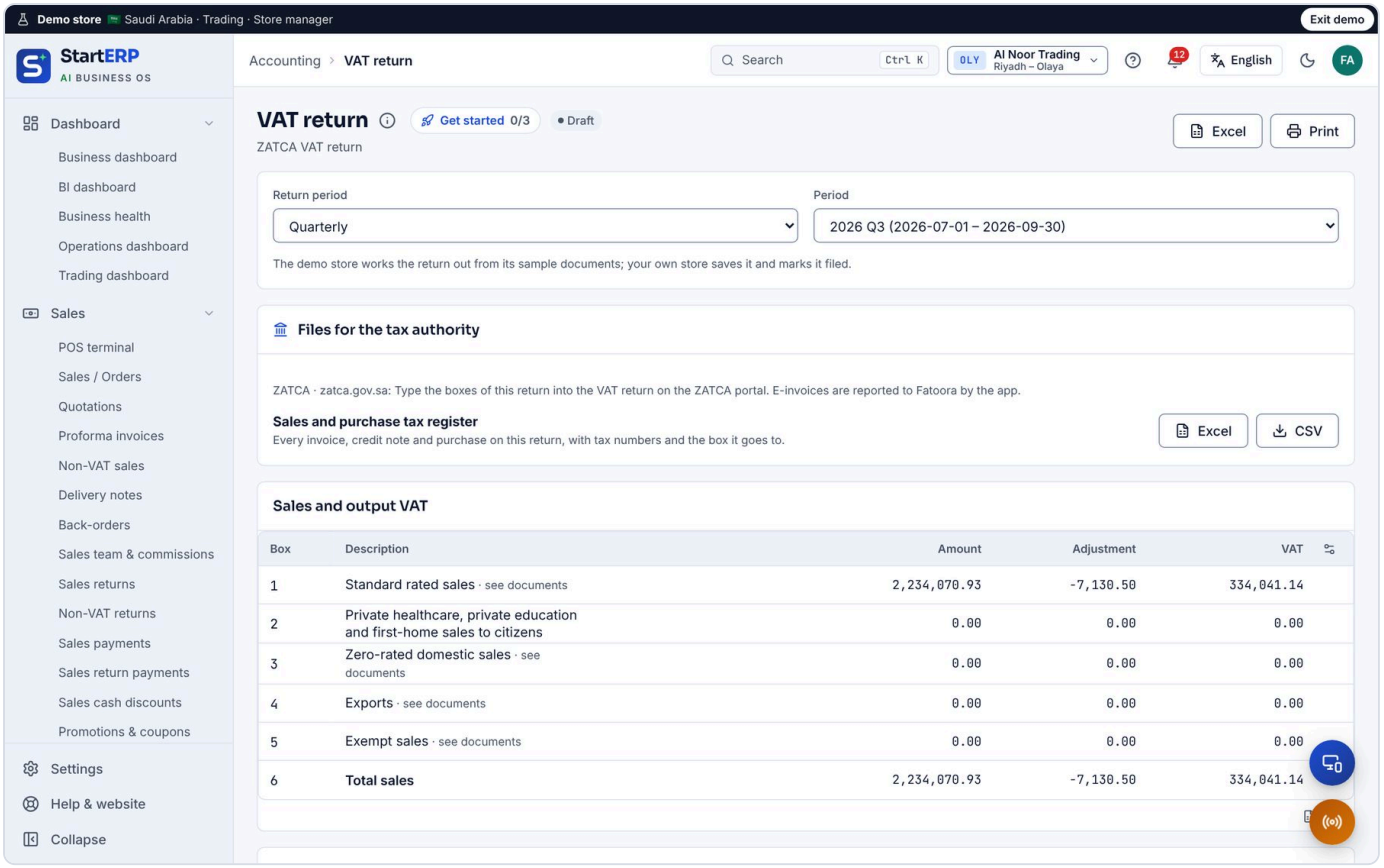
1. Every sale, purchase, payment and expense is posted to the accounts by itself. Open **Accounting › Accounts** for the chart of accounts and each account's balance, and **Ledger** for the entries.
2. Use **Journal vouchers** for entries of your own (opening balances, adjustments).
3. **Profit and loss** and the **Balance sheet** are on the Business dashboard (Revenue and Customers & Finance tabs) for any period. Each report can be exported or printed.



The chart of accounts with balances.

11. Saudi VAT and ZATCA Phase 2 (requirement 20)

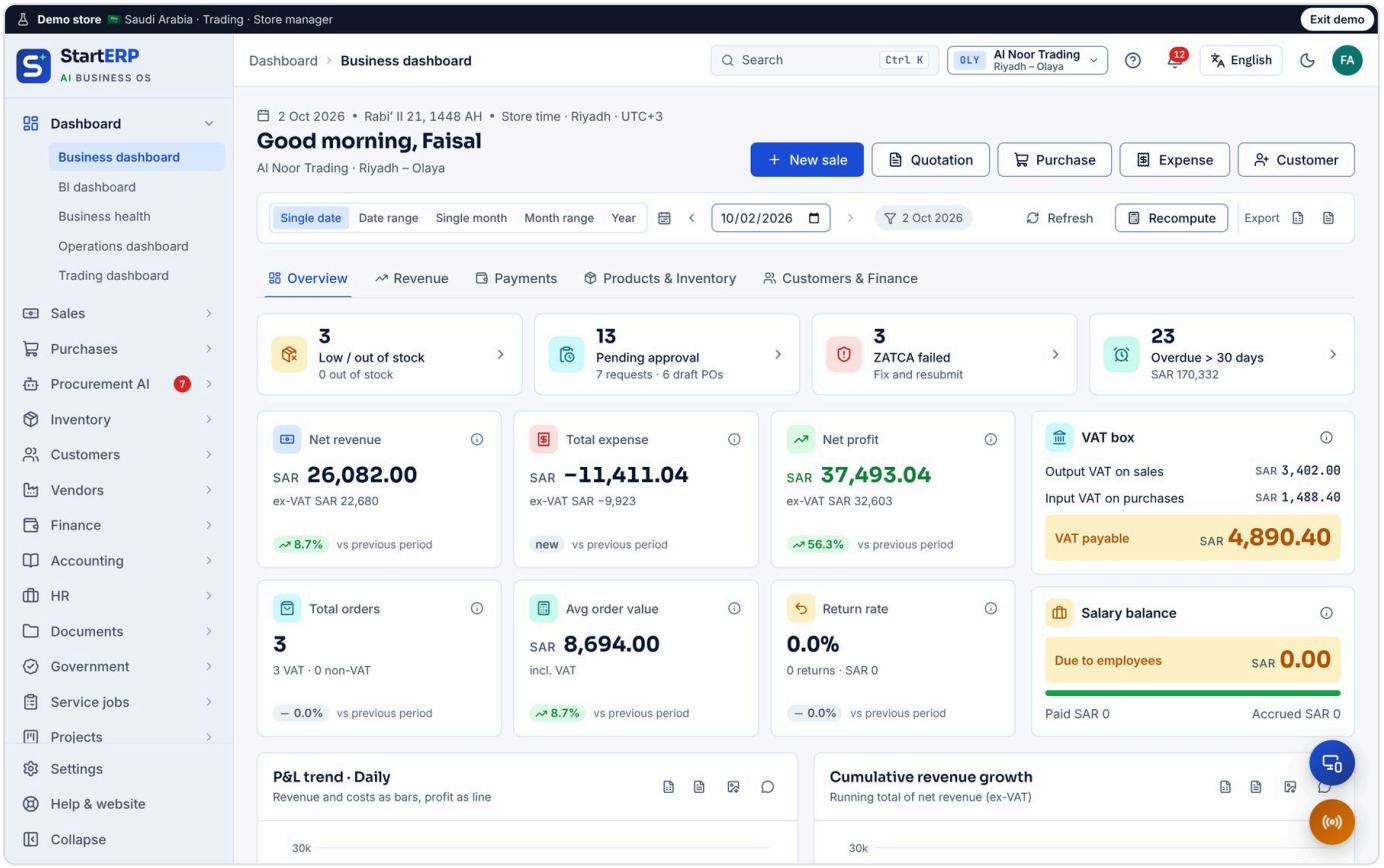
1. VAT at 15% is on every product and document; invoices print bilingual (English and Arabic) with the QR code.
2. With the **ZATCA e-invoicing (Phase 2)** add-on, connect each branch once in **Settings → ZATCA** with the OTP from the Fatoora portal.
3. From then on each invoice, return, credit and debit note is signed and sent to ZATCA by itself: standard (B2B) invoices are cleared, simplified (B2C) ones reported. Each document shows Reported, In progress or Failed.
4. Open **Accounting › VAT return** for the period's output VAT, input VAT and VAT payable, ready for your return.



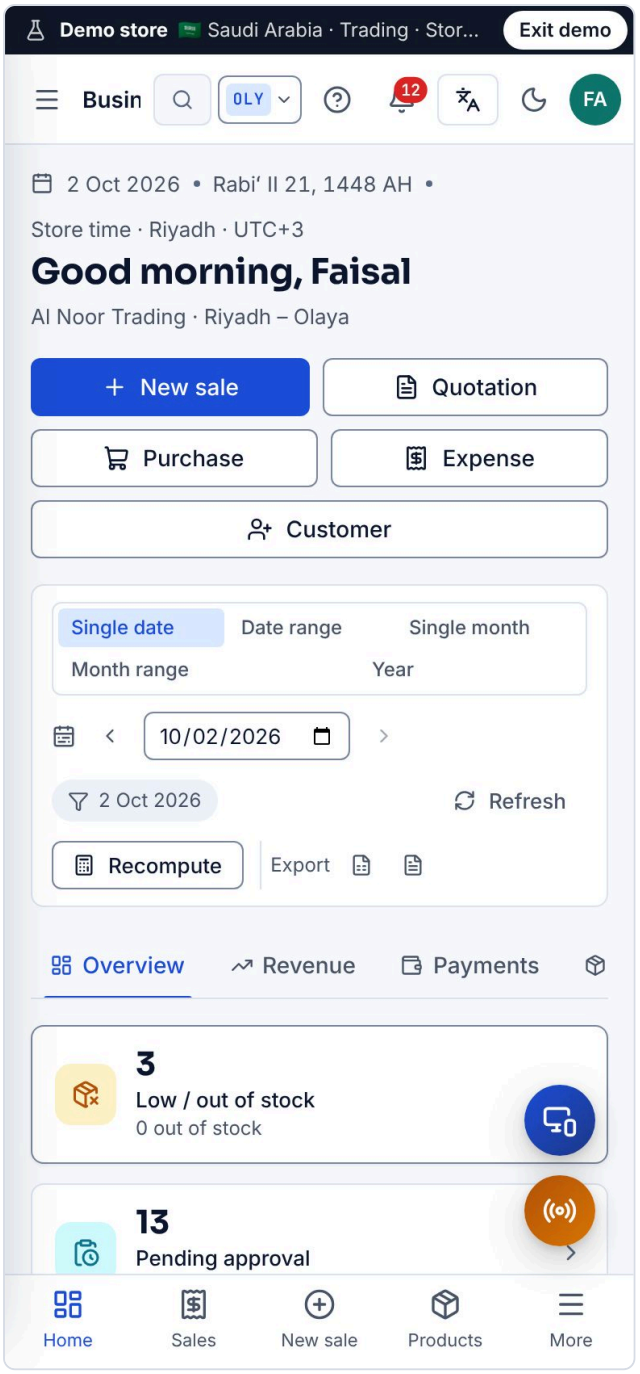
The VAT return.

12. The owner's dashboard on phone and laptop (requirements 21 and 22)

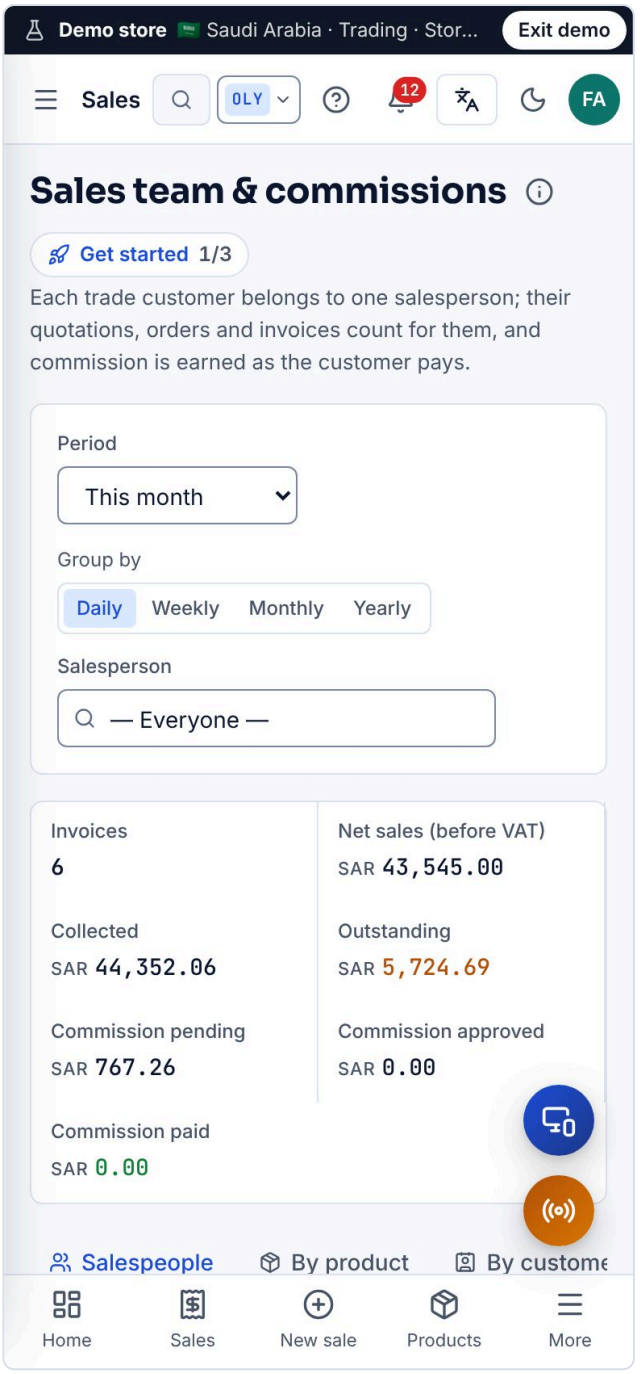
Open StartERP in any browser on your laptop or phone, or install the Android app or the Windows desktop app. The **Business dashboard** opens on today and shows sales, expenses, profit, VAT, money owed to you, stock alerts and more; pick any day, month or year with the period picker. Each card's ⓘ opens the details behind the figure.



The Business dashboard on a laptop.



The dashboard on a phone.



Sales team & commissions on a phone.

> You can also ask StartAI, the assistant in the app, questions such as "Who sold most this month?" or "How much commission is pending?", and hear StartAI Radio's spoken news about your business.

13. Setup, data entry and training (requirements 24 and 25)

The StartERP team sets up your store with you and hands it over:

1. **Setup and configuration:** company details, VAT and CR numbers, logo and invoice layout, warehouses, the add-on modules above, the ZATCA connection and your commission rates.
2. **Data entry support:** customers, suppliers, products and opening stock are imported from your Excel or CSV files with the **Import** button on each list (a sample file shows the columns). Data in an old desktop system can be brought over with the Data migration add-on.
3. **Testing:** a quotation, an invoice with a part payment, a purchase, an expense and a commission approval are tried together on your own data before you go live.
4. **Training and handover:** each of your 4 users is shown the screens of their role (owner, manager, salesman, accountant). Afterwards, the **?** button on every screen and this guide take you through each step.

Your first week, step by step

Day	What to do
1	Add your users and their roles; check company and VAT details.
2	Import products and opening stock; import customers and suppliers.
3	Give each customer their salesperson; set the commission rates.
4	Connect ZATCA; make a test quotation and invoice; record a partial payment.
5	Record purchases and expenses; open the dashboard and Sales team & commissions together.