Global Software Knowledge

1. Page: users-list

Users List

User Management in Clix

The User Management feature in Clix allows administrators to view, add, and manage user accounts within the software. This section of the manual will guide you through the User Management interface and its functionalities.

Accessing User Management:

1. From the main dashboard, locate the sidebar menu on the left.
2. Click on "User management" in the menu to access the Users List page.

Users List Overview: The Users List page displays all user accounts in a table format with the following columns:

- User name: The username of the account
- Email address: The associated email for the account
- Last login time: The time of the user's most recent login
- Last login date: The date of the user's most recent login
- Status: The current status of the account (e.g., active)
- Additional options: Accessed via the "..." menu for each user

Key Features:

1. Search: Use the search bar at the top to quickly find specific users.
2. Add User: Click the green "+ Add User" button in the top right to create a new user account.
3. Sort: Use the "Sort By: Default" dropdown to organize the list according to different criteria.
4. Filters: Click the funnel icon to apply filters to the user list.

Managing Users:

- To view or edit a user's details, click on their username or use the "..." menu.
- The status column allows you to quickly see which accounts are active.

Best Practices:

- Regularly review the user list to ensure all accounts are up-to-date and necessary.
- Use the last login information to identify inactive accounts that may need attention.

This section of the user manual provides an overview of the User Management functionality in Clix. For more detailed instructions on specific tasks like adding a new user or modifying permissions, please refer to the respective sections of this manual.

2. Add a new user

Page : users/<uuid>
Adding a New User in Clix

This section guides you through the process of adding a new user to the Clix system.

Accessing the Add User Page:

1. Click "User management" in the left sidebar menu.
2. On the Users List page, click the green "+ Add User" button in the top right corner.

Add User Interface:

Client Info:

1. First Name*: Enter the user's first name
2. Last Name*: Enter the user's last name
3. Phone: Enter the user's phone number
   - Use the dropdown to select the country code (default: +966 for Saudi Arabia)
4. Email: Enter the user's email address
5. Password*: Create a secure password for the new user
   - Repeat the password in the second field for confirmation
   - Use the eye icon to toggle password visibility
   - Note: The password field is highlighted in yellow, indicating its importance

User Status:

- Use the dropdown menu to set the initial status of the user account (default: Active)

Upload Logo:

- Click the upload icon or drag and drop an image file to add a user logo
- Supported formats: SVG, PNG, JPG, or GIF (max. 800x400px)

User Role:

- Click the dropdown menu to select the appropriate user role
- Available roles include:
  - Admin: Full system access and control
  - Create Invoice: Ability to generate new invoices
  - View Invoice: Permission to view existing invoices

Adding the User:

1. After filling in all required fields (marked with *), click the green "Add User" button in the top right corner.
2. To discard changes and return to the Users List, click "Cancel".

Best Practices:

- Ensure all required fields are filled accurately before adding the user.
- Choose a strong, unique password for each new user.
- Assign the appropriate user role to maintain proper access control.
- Consider uploading a profile picture or logo for easy visual identification.

Notes:

- The "Back to Users" button at the top left allows you to return to the Users List without saving any entered information.
- The User status is set to "Active" by default, unlike in the previous version where it was "Inactive".
- The User Role selection now shows specific roles with radio button options, providing clearer role definitions.

This updated section provides a comprehensive guide to adding new users in the Clix system, reflecting the latest interface and options available.

3. Item List in Clix

Page: items/item-list

This section of the manual will guide you through using the Item List feature, which allows you to manage your inventory and products.

Accessing the Item List:

1. From the main dashboard, locate the sidebar menu on the left.
2. Click on "Items" to expand the submenu.
3. Select "Item list" to access the Item List page.

Item List Overview: The Item List page displays all items in your inventory in a table format with the following columns:

- Item name: The name of the product or service (e.g., "Diesel")
- Price: The unit price of the item (e.g., 100.00)
- SKU: Stock Keeping Unit, a unique identifier for each item (e.g., GLL)
- Stock levels: The current quantity in stock (e.g., 99)
- Status: The current status of the item (e.g., Active)
- Additional options: Accessed via the "..." menu for each item

Key Features:

1. Search: Use the search bar at the top to quickly find specific items.
2. Add Item: Click the green "+ Add Item" button in the top right to create a new item entry.
3. Sort: Use the "Sort By: Default" dropdown to organize the list according to different criteria.

4. Filters: Click the funnel icon to apply filters to the item list.

Managing Items:

- To view or edit an item's details, click on the item name or use the "..." menu.
- The status column allows you to quickly see which items are active or inactive.

Best Practices:

- Regularly review your item list to ensure all entries are up-to-date.
- Use the SKU and stock levels to maintain accurate inventory tracking.
- Keep the status field updated to reflect the current availability of items.

This section of the user manual provides an overview of the Item List functionality in Clix. For more detailed instructions on specific tasks like adding a new item or modifying existing entries, please refer to the respective sections of this manual

4. How to Add an Item

Page:items/item-list/add

1. Navigation:
    - To add a new item, navigate to the "Items" section in the left sidebar menu.
    - Select "Item list" sub-menu.
    - Click the "Add item" on the right side of the page.
2. Item Image:
    - Click the upload icon or drag and drop an image into the designated area.
    - Supported formats: SVG, PNG, JPG, or GIF
    - Maximum image size: 800x400px
3. Item Name:
    - Enter the name of the item in your primary language.
    - This field is required (indicated by the asterisk *).
4. Item Name (Arabic):
    - Enter the name of the item in Arabic.
    - This field is required (indicated by the asterisk *).
5. Business Type:
    - Select the appropriate business type from the dropdown menu.
    - The default value shown is "B2B" (Business to Business).
6. Short Description:
    - Provide a brief overview of the item.
    - Keep it concise as this field is intended for a quick summary.
7. Description:
    - Enter a detailed description of the item.
    - Use this field for comprehensive information about features, specifications, or any other relevant details.
8. Additional Sections: On the right side of the screen, there are three expandable sections for further item details:
    - Item info: Click to add a few details about the item.

    - Price: Click to add price details.
    - Stock: Click to add stock details.
9. Action Buttons:
    - Cancel: Discard changes and exit the form.
    - Back: Return to the previous screen (likely the item list).
    - Next: Save the current information and proceed to filling Price information

Add price information

After completing the initial item information and clicking "Next", you'll be directed to the Price details screen. This section allows you to set the item's selling price and VAT (Value Added Tax) information.

1. Selling Price:
    - Enter the selling price of the item in the "Selling Price" field.
    - This is a required field, as indicated by the asterisk (*).
    - Input the price in your default currency (not shown, but typically set in your account settings).
2. VAT (Value Added Tax): This section determines how VAT will be applied to the item. a. VAT Type:
    - Click the dropdown menu to select the appropriate VAT type.
    - Options include: • None • Standard Rated • Zero Rated • Exempt from VAT • Not Subject to VAT
    - This is a required field, as indicated by the asterisk (*).
    - Choose the option that correctly reflects the item's VAT status according to your local tax regulations.
3. VAT Rate:
    - This dropdown will become active based on your VAT Type selection.
    - If you selected "Standard Rated" or "Zero Rated", choose the appropriate VAT percentage from this dropdown.
    - This is a required field when applicable, as indicated by the asterisk (*).
4. Navigation:
    - Cancel: Discards all changes made in the item creation process and returns to the main Items list.
    - Back: Returns to the previous screen to modify general item information.
    - Next: Saves the price information and proceeds to the next step (likely stock details, based on the sidebar).
5. Progress Indicator: The right sidebar shows your progress in the item creation process:
    - Item info: Completed (indicated by the checkmark)
    - Price: Current step (highlighted)
    - Stock: Next step

Remember, you can always return to this screen later to update pricing information if needed by editing the item from the Item list.

Stock Details

After completing the price information and clicking "Next", you'll arrive at the Stock details screen. This section allows you to set up inventory tracking for your item.

1. Unlimited Stock:
   - Toggle switch at the top of the screen.
   - When enabled, the system won't track quantity for this item.
   - Useful for services or products you don't need to monitor stock levels for.
2. SKU (Stock Keeping Unit):
   - Required field (indicated by the asterisk *).
   - Click the dropdown to select or enter a unique identifier for this item.
   - SKU helps in tracking and managing inventory efficiently.
3. Alert Quantity:
   - Enter a number to set a low stock alert threshold.
   - Default is set to 0.
   - When stock reaches this number, the system will notify you to reorder.
4. Enter Current Stock Quantity:
   - Input the current number of units you have in stock.
   - Default is set to 0.
   - This establishes the initial inventory count for the item.
5. Navigation:
   - Cancel: Discards all changes made in the item creation process.
   - Back: Returns to the previous Price details screen.
   - Next: Saves the stock information and likely completes the item creation process.
6. Progress Indicator: The right sidebar shows your progress:
   - Item info: Completed (checkmark)
   - Price: Completed (checkmark)
   - Stock: Current step (highlighted)

5. Item Details Page

Page: items/item-list/<uuid>
Item Details Page

The Item Details page provides a comprehensive overview of a specific product or service in your inventory. To access this page:

1. Navigate to the Items list
2. Select the desired item
3. You will see the Item Details page, which displays key information about the selected item

Key Elements:

1. Item Name: Displayed at the top of the page (e.g., "ACME Invisibility Paint")
2. Manage Button: Located in the top-right corner, allows you to perform additional actions on the item
3. Item Details Section:
   - Item category: Categorization of the product (not shown in this example)
   - Cost: The price you pay for the item (e.g., 100.000000)
   - Selling Price: The price at which you sell the item (e.g., 100.000000)
   - Applicable Tax: Any taxes that apply to this item (field is empty in this example)

    - Short description: A brief explanation of the item (e.g., "Paint to make objects invisible")
    - Description: A more detailed explanation of the item (same as short description in this case)
4. Item Status Section:
    - Item status: Current status of the item (e.g., Active)
    - Stock: Indicates if stock is tracked for this item
    - SKU: Stock Keeping Unit identifier (e.g., LTP)
    - Alert Quantity: The stock level at which you'll be notified to reorder (e.g., 2)
    - Current Stock Quantity: The number of units currently in stock (e.g., 7)

To edit any of these details, use the Manage button or click on the editable fields directly. Always ensure that the information is accurate and up-to-date to maintain proper inventory control and financial records.

6. Page: setup/reasons

Reasons Page

The Reasons page allows you to manage and view different reasons used in the system, particularly for credit notes. To access this page:

1. Navigate to the Setup menu in the left sidebar
2. Click on "Reasons"

Key Elements of the Reasons Page:

1. Page Header: Displays "Reasons" at the top of the main content area
2. Add Reason Button: Located in the top-right corner, labeled "+ Add reason"
3. Search Bar: Allows you to search for specific reasons
4. Sort Options: A dropdown menu labeled "Sort By: Default" is available
5. Filters: A "Filters" button is present for applying additional filters to the list
6. Reasons List: Displays a table with the following columns:
    - Reason Name
    - Reason description
    - Associated category
    - Status
    - More options (indicated by "..." in the last column)
7. Example Entry: The screenshot shows one reason entry:
    - Reason Name: Spoilt Goods
    - Reason description: Spoilt Goods
    - Associated category: CREDIT_NOTE
    - Status: active

To add a new reason, click the "+ Add reason" button. To modify existing reasons, use the options menu ("...") in the last column of each entry.

This page helps you manage and categorize reasons for various accounting actions, particularly those related to credit notes.

7. Page: setup/setup/reasons/add

Add Reason Page

This page allows you to add a new reason to the system. To access this page:

1. Navigate to Setup > Reasons in the left sidebar
2. Click on the "+ Add reason" button on the Reasons list page

Key Elements:

1. Page Header: "Add reason" is displayed at the top of the main content area
2. Navigation: A "Back to Reasons list" option is available in the top-left corner
3. Action Buttons:
   - Cancel: Located in the top-right corner
   - Add Reason: A green button in the top-right corner to submit the new reason
4. Reason Info Section:
   - Reason Name*: A required text input field
   - Reason Type*: A required dropdown field (currently empty in the image)
   - Reason Description*: A required text area for detailed description
   - Reason Description (Arabic)*: A required text area for the Arabic translation of the description

Note: Fields marked with an asterisk (*) are required.

To add a new reason:

1. Fill in the Reason Name
2. Select the appropriate Reason Type from the dropdown
3. Provide a detailed Reason Description
4. Enter the Arabic translation of the description
5. Click the "Add Reason" button to save the new reason

This page allows you to create and categorize new reasons for various accounting actions within the Clix system.

8. Page "dashboard",

"image": "dashboard.png",
Default Dashboard

The Default Dashboard provides an at-a-glance overview of your business's key financial and operational metrics. It's the first screen you'll see upon logging into Clix.

Key Elements:

1. Account Status Alert: At the top, you may see important notifications about your account status.
2. Financial Summaries: The dashboard displays several key financial indicators, including:
    - Total Invoice: Shows the total invoice amount and count.
    - Items: Presents the total value of items, along with counts of active and deactivated items.
    - Total Client: Indicates the total client value, with counts of active and deactivated clients.
    - Total Tax Collected: Displays the total tax collected and the number of invoices with collected tax.
3. Invoice Overview: A donut chart visualizes invoice data for a selected time period (e.g., last 12 months).
4. Top Trending Client: This section is designed to show information about your most significant clients.
5. Stock Status: Provides a quick status update on your inventory levels.
6. Client Status: Offers a snapshot of your client base status.
7. Compliance Status: A circular chart at the bottom right shows the approval status of your transactions, which may be relevant for regulatory compliance.
8. AI Assistant: An "Ask AI" button is available for additional support or information.

This dashboard is designed to give you a comprehensive overview of your business's financial health and operational status at a glance, allowing for quick and easy monitoring of key metrics.

9. Add Invoice

Page "invoices/add",
"image": "invoice_add.png",
Create Invoice Page

The Create Invoice page allows you to generate a new invoice for your business. Here's an overview of the key sections and features:

1. Navigation:
    - A "Back to Invoice list" option is available at the top.
    - "Cancel" and "Preview And Issue" buttons are in the top-right corner.
2. Business Info:
    - Displays your business name, VAT number, phone number, and business address.

3. Invoice Info:
   - Select Device: Choose the relevant device (affects client type selection).
   - Client Type: Select the appropriate client type.
   - Invoice For: Specify who the invoice is for.
   - Payment Means Type Code: Choose the payment method.
4. Invoice Information:
   - Supply Date and Supply End Date: Set these dates using the calendar picker.
5. Invoice Items:
   - Add/Edit Items: Click to add or modify items on the invoice.
   - Amount: Displays the total amount for added items.
6. Invoice Discount:
   - Add New Discount: Option to apply discounts to the invoice.
   - Invoice discount: Shows the total discount amount.
7. Additional Details:
   - Add Note: Option to include additional notes on the invoice.
8. Total Summary (right side):
   - Subtotal
   - Subtotal with Discount
   - VAT
   - Invoice discount
   - Net Amount

This page provides a comprehensive interface for creating detailed, customized invoices for your business transactions.

10.Invoices

Page "invoices",
"image": "invoices_list.png",
Invoices List Page

The Invoices List page provides an overview of all invoices in the system. Here's a description of its key features:

1. Page Header:
   - Title: "Invoices List" is displayed at the top.
   - Create Invoice: A green "+ Create invoice" button allows you to generate a new invoice.

2. Search and Filter Options:
   - Search bar: Allows you to search for specific invoices.
   - Sort By: A dropdown menu to sort the list (currently set to "Default").
   - Filters: An option to apply additional filters to the list.

3. Summary Statistics:
  Four key metrics are displayed at the top of the list:
  - Invoice Amount
  - Tax Amount
  - Amount excluding tax
  - Discount Amount
  Each shows the total sum across all invoices in the currency used (SAR in this case).

4. Invoice List:
  A table displaying individual invoices with the following columns:
  - Ref: The unique reference number for each invoice.
  - Client Name: Name of the client for whom the invoice was created.
  - Creation Date: The date the invoice was generated.
  - Due Date: The payment due date for the invoice.
  - Net Amount: The total amount due for the invoice.
  - Counter: A numerical identifier.
  - Invoice Status: Indicates whether the invoice has been paid (e.g., "NOT_CLEARED").
  - More Options: An ellipsis (...) likely provides additional actions for each invoice.

5. Pagination:
  - Shows the current page and total number of records.
  - Provides navigation to move between pages of the list.

This page offers a comprehensive view of all invoices, allowing for easy management and monitoring of your business's billing activities.

11. Invoice View

Page "invoices/<uuid>",
"image": "invoice_view.png",

Invoice Details Screen:
The invoice details screen displays comprehensive information about a specific invoice. At the top, you'll see the invoice number and a back button to return to the invoice list.

Key elements include:
- Invoice Details and Attachment tabs for easy navigation
- Invoice number, date, time, and due date clearly displayed
- "To Arabic" button for language toggle
- Sender and recipient information sections
- Itemized list of products/services with columns for description, price, quantity, VAT, and total
- Subtotal, discount, and VAT amounts
- Net amount prominently shown
- Notes section for additional information
- QR code (likely for digital payments or verification)

- Software branding and version information

The layout is clean and intuitive, with a partial green background adding visual interest. This screen allows users to quickly view all relevant invoice information in one place.

12. Client List

Page "clients/clients-list",
"image": "clients_list.png",

Clients List Screen:
The Clients List screen provides an overview of all clients in the system. This interface allows users to manage and view client information efficiently.

Key elements include:

1. Page Header:
   - "Clients List" title at the top
   - "Add Client" button in the upper right corner for quick addition of new clients

2. Search and Filter Options:
   - Search bar on the left for finding specific clients
   - "Sort By" dropdown menu to organize the list
   - "Filters" button to refine the displayed results

3. Client Information Table:
   - Each row represents a client with their details
   - Columns typically include:
      - Client name (with an icon)
      - Industry
      - Organization ID Type
      - VAT Group
      - VAT Number
      - Status (with an "Active" toggle button)
      - More options (represented by "..." for additional actions)

4. Layout:
   - Clean, white background for easy readability
   - Information presented in a tabular format
   - Alternating row colors for better visual separation

This screen allows users to quickly view, search, and manage their client database, with options to add new clients and perform actions on existing ones.

13. Client Detail

url: "clients/<uuid>",
"image": "client_info.png",

Client Details Screen:
This screen provides detailed information about a specific client. It allows users to view and manage individual client data.

Key elements include:

1. Navigation:
   - Left sidebar menu for quick access to different software sections
   - "Back to Clients" button at the top left to return to the client list

2. Client Identification:
   - Client name displayed prominently at the top of the screen
   - "Manage" dropdown button in the top right for client-specific actions

3. Information Tabs:
   - Tabs to switch between "Client Info", "Address", and "VAT" details

4. Client Information Display:
   - Organized in a clean, easy-to-read layout
   - Fields typically include:
     - Client ID
     - Client Type
     - Business ID Type
     - Business ID Number
     - Email
     - Phone Number
     - Website
   - Some fields have copy icons for quick information transfer

5. Client Status:
   - Clearly visible "Client status" indicator (e.g., Active/Inactive)

6. Layout:
   - Clean white background for the main content area
   - Contrasting color scheme for the sidebar to differentiate navigation from content

This screen allows users to access and manage comprehensive information for each client, facilitating efficient client relationship management within the software.

14. Edit Client Details

url : "clients/clients-list/edit/<uuid>",
"image": "client_edit.png″

This screenshot shows the "Edit Client" page in the Clix accounting software. Here's a description of its key features and layout for a user manual:

Edit Client Page

This page allows users to modify and update client information. It provides a comprehensive form for entering various details about the client.

Key Features:

1. Navigation:
   - A "Back to Clients" button at the top allows users to return to the main clients list.
   - The left sidebar provides quick access to other software modules, with "Clients" expanded to show sub-options.

2. Page Actions:
   - "Cancel" button to discard changes.
   - "Save changes" button to confirm and update the client information.

3. Client Info Section:
   - Client type selection (B2C or B2B)
   - Fields for Buyer Name (in English and Arabic)
   - Industry dropdown
   - Website field
   - Business ID Type dropdown (Iqama Number selected)
   - Business ID Number field
   - VAT Group Number and VAT Number fields

4. Upload Logo:
   - Area to upload or drag-and-drop a client logo file

5. Client Status:
   - Dropdown to set the client's status (currently set to "Active")

6. Contact Info:
   - Fields for contact person name (in English and Arabic)
   - Email field
   - Phone number field with country code selector

7. Business Address:

   - Interactive map for selecting the client's location (currently showing an error loading Google Maps)
   - Fields for Country and State (Saudi Arabia and Riyadh pre-selected)

8. User Information:
   - The current user's name and email are displayed at the bottom of the sidebar.

9. AI Assistant:
   - An "Ask AI (Beta)" button in the bottom-right corner, likely providing AI-powered assistance for filling out the form.

This page provides a comprehensive interface for managing all aspects of a client's information within the Clix accounting software. It allows for easy updates to business details, contact information, and address data, ensuring that client records are accurate and up-to-date.

15.Add new client

url: "clients/clients-list/add",
"image": "client_add.png",
The Add Client screen in the Clix accounting software allows users to input new client information. Here's a general overview of its key features:

1. Navigation:
   - Left sidebar menu for accessing different sections of the software
   - "Back to Clients" button at the top for returning to the client list

2. Page header:
   - "Add Client" title
   - "Cancel" and "Add Client" buttons for managing the new entry

3. Client Information:
   - Client type selection (B2C or B2B)
   - Fields for buyer name (in local language and Arabic), industry, website
   - Business ID type and number
   - VAT group number and VAT number

4. Logo Upload:
   - Option to upload a client logo with file type and size guidelines

5. Client Status:
   - Dropdown to set the client's status (e.g., Active)

6. Contact Information:
   - Fields for contact person's name (in local language and Arabic)

- Email and phone number with country code selection

7. Business Address:
   - Search bar for location or short code
   - Fields for country and state (with Saudi Arabia pre-selected as the country)
   - Note: The map functionality appears to be having issues loading

8. Layout:
   - Clean white background for the main content area
   - Clearly labeled form fields
   - Asterisks indicating required fields

This screen provides a comprehensive interface for users to add new clients to the system, ensuring all relevant details are captured for proper client management and accounting purposes.

16. View Client Group

url: "clients/clients-group/<uuid>",
"image": "clients_group_view.png",
This screen displays details for a specific client group labeled as "Important" in the Clix accounting software. Here's an overview of its key features:

1. Navigation:
   - "Back to Clients Group" button at the top left for returning to the main client groups list

2. Page header:
   - "Important" as the title of the client group
   - "Manage" dropdown button in the top right, likely for actions related to this group

3. Client Information Display:
   - Shows details for a single client in this group
   - Information is presented in a card-like format with the following fields:
     - Client name (ACMEBuye) with an icon
     - Industry (Design)
     - Organization ID Type (NAT)
     - VAT Group (not specified in this instance)
     - VAT Number (312345678961233)

4. Layout:
   - Clean, white background with a subtle shadow effect for the client card
   - Information is clearly organized and easy to read

This screen provides a quick overview of key information for clients categorized as "Important". It allows users to quickly access and manage critical client data within this specific group. The "Manage" button suggests that users can perform actions related to this client or group from this view.

17. Edit Client Group

url: "clients/client-groups/edit/<uuid>",
"image": "clients_group_edit.png",

18. Client Group Main Page

url: "clients/clients-group",
"image": "clients_group.png",

This screen shows the Client Group management interface in the Clix accounting software. Here's an overview of its key features:

1. Navigation:
   - Left sidebar menu for accessing different sections of the software
   - "Clients group" is highlighted, indicating the current page

2. Page header:
   - "Client Group" title
   - "Add Client Group" button in the top right corner

3. Search and Filter Options:
   - Search bar for finding specific client groups
   - "Sort By" dropdown menu (currently set to "Default")
   - "Filters" button for additional filtering options

4. Main Content Area:
   - Currently displays a "No Clients Group Founded" message
   - Explanation: "To add client Group you need to create business first"
   - Another "Add Client Group" button below the message

5. Visual Elements:
   - A stylized graphic on the right side, likely a placeholder when no groups are present

6. Layout:
   - Clean white background for the main content area
   - Consistent color scheme with green accent colors for buttons and highlights

This screen indicates that no client groups have been created yet. It prompts the user to create a business first before adding client groups, suggesting a sequential setup process in the software. The multiple "Add Client Group" buttons provide clear calls-to-action for users ready to create their first group.

19. Page "clients/clients-group/add",

"image": "clients_group_add.png",
This screen shows the Create Client Group interface in the Clix accounting software. Here's an overview of its key features:

1. Navigation:
   - Left sidebar menu for accessing different sections of the software
   - "Clients group" is highlighted, indicating the current section
   - "Back to Clients" button at the top left for returning to the main clients page

2. Page header:
   - "Create Client Group" title
   - "Cancel" and "Create Group" buttons in the top right corner

3. Client Group Info:
   - Field for entering the "Group Name" (marked as required with an asterisk)

4. Clients List Section:
   - Currently displays a "No Clients Founded" message
   - Explanation: "To add client you need to create business first"
   - "Add Client" button provided

5. Visual Elements:
   - A stylized graphic on the right side, likely a placeholder when no clients are present

6. Layout:
   - Clean white background for the main content area
   - Consistent color scheme with green accent colors for buttons and highlights

This screen is designed for creating a new client group, but it indicates that no clients have been added to the system yet. The user is prompted to create a business first before adding clients, suggesting a sequential setup process in the software. The interface provides clear guidance on the next steps required to set up client groups and manage clients within the Clix system.

20. Credit Note List

url: "credit-note",
"image": "credit_note_list.png",

Credit Note List

The Credit Note list provides an overview of all credit notes in the system. This screen allows users to view, search, and manage credit notes efficiently.

Key Features:

1. Create Credit Note: A prominent "Create Credit Note" button in the top-right corner allows users to generate new credit notes.

2. Search Functionality: A search bar at the top of the list enables quick lookups of specific credit notes.

3. Sorting and Filtering: Users can sort the list using the "Sort By" dropdown menu. A "Filters" option is available for more refined searches.

4. Summary Statistics: The top of the list displays key totals:
   - Credit Note Amount
   - Tax Amount
   - Amount excluding tax
   - Discount Amount

5. Detailed List View: The main table shows individual credit note entries with the following information:
   - Client Name
   - Creation Date
   - Due Date
   - Net Amount
   - Counter (a numerical identifier)
   - Invoice Status

6. Pagination: Navigation controls at the bottom allow users to move between pages of results.

7. Currency Display: Monetary values are shown with the currency code (e.g., SAR) for clarity.

8. Status Indicators: The Invoice Status column uses color-coded labels to quickly convey the current state of each credit note.

This comprehensive view allows users to efficiently manage and track credit notes within the Clix accounting software, providing essential information at a glance while offering tools for detailed analysis and processing.

21. Credit Note

Page "credit-note/<uuid>",

"image": "credit_note.png",

Thank you for providing this screenshot of the Credit Note details page in the Clix accounting software. I'll create a user manual description for this feature, focusing on the general functionality and layout:

Credit Note Details

The Credit Note Details page provides a comprehensive view of an individual credit note. This screen allows users to review all relevant information for a specific credit note.

Key Features:

1. Navigation:
   - A "Back to Credit Note List" button at the top allows easy return to the main list.
   - The left sidebar provides quick access to other software modules.

2. Credit Note Identifier:
   - A unique identifier for the credit note is displayed at the top of the page.

3. Language Toggle:
   - A "To Arabic" button allows switching the interface language.

4. Tabbed Interface:
   - Tabs for "Credit Note Details" and "Attachment" organize information.

5. Invoice Information:
   - Displays Invoice No., Invoice Date, Invoice Time, and Due Date.
   - Shows "Invoice From" and "Invoice To" details, including company names and contact information.

6. Item Details:
   - Lists items with columns for Description, Price, Quantity, VAT, Total, and Total with VAT.

7. Financial Summary:
   - Subtotal
   - Subtotal with Discount
   - Discount amount
   - VAT amount
   - Net Amount (prominently displayed)

8. Notes Section:
   - Allows for additional comments or information about the credit note.

9. QR Code:
   - A QR code is provided, likely for quick access to the credit note details.

10. User Information:
    - The current user's name and email are displayed at the bottom of the sidebar.

This detailed view allows users to access all relevant information about a specific credit note, facilitating efficient management and processing within the Clix accounting software.

22. Page "credit-note/add",

"image": "credit_note_add.png",
This screenshot shows the "Create Credit Note" page in the Clix accounting software. Here's a description of its key features and layout for a user manual:

Create Credit Note Page

This page allows users to create a new credit note by selecting invoices and providing necessary information.

Key Features:

1. Navigation:
   - A "Back to credit note list" button at the top allows users to return to the main list.
   - The left sidebar provides quick access to other software modules.

2. Page Actions:
   - "Cancel" button to abort the creation process.
   - "Issue Note" button to finalize and create the credit note.

3. Credit Note for:
   - A search field to look up invoices by number or client.
   - A filter button (funnel icon) for advanced search options.

4. Selected Invoices:
   - Displays the number of invoices currently selected (0 in this image).
   - A section below shows "No Invoices selected yet" when empty.
   - Instructions to "Select invoices to start edit items inside it" are provided.

5. Credit Note Information:
   - Supply date: A date picker for entering the supply date.
   - Supply due date: A date picker for entering the due date.

6. Payment Means Type Code:
   - A dropdown for selecting the payment means.
   - An additional dropdown for selecting the reason (labeled "Select Reason").

7. User Information:

- The current user's name and email are displayed at the bottom of the sidebar.

This page guides users through the process of creating a new credit note by selecting relevant invoices and providing necessary details such as dates and payment information. The layout is designed to make the creation process straightforward and efficient.

23. Page "business/<uuid>",

"image": "business.png",
This screenshot displays the Business Information page for a client named ACME in the Clix accounting software. Here's a description of its key features and layout for a user manual:

A. Business Information Page

This page provides a detailed view of a client's business information, allowing users to review and manage client details.

Key Features:
1. Client Identification:
   - The client's name is prominently displayed at the top of the page.

2. Management Options:
   - A "Manage" dropdown button in the top-right corner likely provides additional actions for the client account.

3. Information Tabs:
   - Tabs for "Business Info", "Address", "VAT", and "Devices" organize different categories of client information.

4. Edit Functionality:
   - A pencil icon in the top-right corner of the main content area when the manage dropdown is clicked allows for editing the displayed information.

6. Client Information Display:
   - Client Info section shows key details such as:
     - Business ID: A unique identifier for the client
     - Client Type: In this case, B2B or B2C or Both
     - Business ID Type: CRN or OTH
     - Business ID Number: A numeric identifier for the business
     - Phone Number and Website fields.

7. Business Status:

- A dropdown menu in the top-right shows the current status (Active) and allows for quick status changes.

This page provides a comprehensive overview of a client's business information, enabling easy access and management of client details within the Clix accounting software.

B. Address Section (Business Page)

This section displays the physical address details of the business. It includes the following fields:
State: Displays the state in which the business is located.
Example: Riyadh

City: Indicates the city of the business address.
Example: Riyadh

Postal Code: The ZIP or postal code for the location.
Example: 12345

Building Number: The building number in the address.
Example: 1234

Address Line: A detailed street address or description.
Example: 6 th Main street

Show On Map: A clickable link (top-right corner) that opens the location on a map for easier reference.

C. VAT Information

This section details the Value-Added Tax (VAT) registration information for the business.

- VAT Group Number: Indicates the VAT group affiliation, if applicable. This field may be left blank if the business is not part of a VAT group.
- VAT Number: Displays the official VAT registration number of the business. *Example: 312483932900003*

Accurate VAT information is critical for regulatory compliance and tax reporting.

D. Devices Section (Business Page)

This section allows users to manage and view the list of devices associated with their account. It is typically used for linking devices to e-invoicing or compliance systems.

Key Features:

- **Add Device Button**: Enables users to register a new device.
- **Help Link**: Offers access to support resources or documentation.
- **Search Bar**: Allows quick filtering of the device list by name.
- **Sorting and Filtering Options**: Users can sort devices and apply filters to refine their view.

Devices List:

Each device entry displays the following details:

- **Device Name**: A custom label or identifier for the device.
- **Mode**: Indicates the type of operations the device supports (e.g., standard, simplified, or both).
- **Location**: The assigned location or branch where the device is used.
- **Status**: Shows the current setup status of the device (e.g., generated, pending, configured).
- **Created Date**: The date the device was added to the system.

Account Verification Notice:

If the user's account is not verified, a prominent alert will appear, prompting them to verify via a link sent to their registered email address. An option to resend the verification email is also provided.

E. Add Fatoora Device Modal

This modal window is used to register a new device in the system for electronic invoicing.

Fields:

- **Device Name***:
  A required field where users enter a custom name for the device.
- **Generate Invoices For**:
  A dropdown menu allowing the user to specify the invoice type the device will generate (e.g., simplified, standard, or both).

- **Device Location**:
  Input field for specifying the physical or operational location of the device.

- **Fatoora OTP**:
  A segmented input used to enter the One-Time Password (OTP) provided by the official e-invoicing system. This OTP is required to complete device registration.

Actions:

- **Add Device**:
  Submits the form to register the new device.

- **Cancel**:
  Closes the modal without saving any changes.

This page provides a comprehensive overview of a client's business information, enabling easy access and management of client details within the Clix accounting software.

24. Page "/business/edit/<uuid>",

"image": "business_edit.png",
This screenshot shows the "Edit Business" page in the Clix accounting software. Here's a description of its key features and layout for a user manual:

Edit Business Page

This page allows users to modify and update business information for a client. It provides a comprehensive form for entering various details about the business.

Key Features:

1. Navigation:
   - A "Back to business" button at the top allows users to return to the main business view.
   - The left sidebar provides quick access to other software modules.

2. Page Actions:
   - "Cancel" button to discard changes.
   - "Save changes" button to confirm and update the business information.

3. Client Info Section:
   - Fields for Business Name (in English and Arabic)
   - Industry dropdown (Petroleum selected in this example)
   - Website field
   - Business ID Type dropdown (Commercial Registration number selected)
   - Business ID Number field

- VAT Group Number and VAT Number fields (pre-filled and likely read-only)
- Phone number field with country code selector

4. Upload Logo:
   - Area to upload or drag-and-drop a business logo file

5. Business Address:
   - Interactive map for selecting the business location
   - Fields for Country, State, City, Postal Code, Building Number, and Address Line

6. Fatora devices:
   - List of registered devices with Name, Branch, Status, and additional options
   - "Add Device" button to register new devices

7. User Information:
   - The current user's name and email are displayed at the bottom of the sidebar.

This page provides a comprehensive interface for managing all aspects of a business's information within the Clix accounting software. It allows for easy updates to contact details, address information, and device management, ensuring that client records are accurate and up-to-date.

25. Users List

"image": "user_list.png",
This screenshot displays the Users List page in the Clix accounting software. Here's a description of its key features and layout for a user manual:

Users List Page

This page provides an overview of all users registered in the system, allowing administrators to manage user accounts efficiently.

Key Features:

1. Navigation:
   - The left sidebar offers quick access to various software modules, with "User management" highlighted as the current section.
   - A collapsible menu icon in the top-left corner allows for expanding/collapsing the sidebar.

2. Page Header:
   - The page title "Users List" is clearly displayed at the top.
   - An "Add User" button in the top-right corner allows for creating new user accounts.

3. Search Functionality:

- A search bar at the top of the list enables quick lookups of specific users.

4. Sorting and Filtering:
   - A "Sort By" dropdown menu (currently set to "Default") allows for organizing the user list.
   - A "Filters" button provides options for refining the displayed user list.

5. User Information Table:
   - The main table displays detailed information about each user, including:
      - User name (email address used as the username)
      - Email address
      - Last login time
      - Last login date
      - Status (e.g., "active")
   - An ellipsis (...) in the last column likely provides additional options or actions for each user.

6. Table Content:
   - In this example, only one user is shown, but the table is designed to accommodate multiple entries.

This page provides administrators with a comprehensive view of all user accounts in the Clix system, allowing for easy management, monitoring of user activity, and quick access to individual user details. The search, sort, and filter functionalities enhance the ability to navigate and manage larger numbers of users efficiently.

26.Page: "items/item-list/edit/<uuid>",

"image": "item_edit.png",

Edit Item

The Edit Item page allows users to update details related to an item listed in their inventory. Here’s how you can fill in the fields:

1. Item Name: Enter the name of the product in English. This is a required field.

2. Item Name (Arabic): Provide the name of the product in Arabic. This is also a required field.

3. Business Type: The business type is automatically filled in and cannot be edited on this page.

4. Short Description: Briefly describe the item. This field provides a short, concise overview of the item’s purpose or function.

5. Description: Provide a more detailed description of the item, including any specific features or use cases.

6. Price:
    - Selling Price: Input the price at which the item will be sold. This is a required field and should be entered as a numeric value.

7. VAT:
    - VAT Type: Select the appropriate VAT type for the item from the dropdown (e.g., Standard Rated).
    - VAT Rate: This field automatically reflects the VAT rate based on the VAT type selected.

8. Item Image: You can upload an image of the item by clicking the upload button or dragging and dropping an image file into the specified area. Supported file types include SVG, PNG, JPG, and GIF (maximum 800x400px).

9. Item Status: Set the item status to Active or Inactive based on whether the item is currently available for sale.

10. Stock:
    - Unlimited Stock: Toggle this option on if the item has unlimited stock available.
    - SKU (Stock Keeping Unit): Specify the unit of measurement for tracking the item (e.g., litre per litre).
    - Alert Quantity: Set a quantity threshold that triggers an alert when stock levels fall below this value.
    - Enter Current Stock Quantity: Specify the current stock level of the item.

Once all necessary fields are completed, click Save Changes to update the item details. If you want to discard the changes, click Cancel.

This section describes how to edit an item in the Clix accounting software. If you're providing additional details for the user manual, you can expand on individual fields as necessary.