Global Software Knowledge

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.

Adding a New User in Clix

The *Add User* page in Clix accounting software allows administrators to register a new user in the system. This guide outlines each section and its purpose to help you complete the process smoothly.

Add User Form Details:

Client Info

- First Name*: Enter the user's first name.
- **Last Name***: Enter the user's last name.
- **Phone**: Provide the user's phone number. Use the dropdown to select a country code (default is +966 for Saudi Arabia).
- **Email**: Enter the user's email address.
- **Password***: Set a secure password. Confirm it in the adjacent field.
    - Use the eye icon to show or hide the password input.
    - The field is highlighted to emphasize its importance.

User Status

- Choose the user's account status from the dropdown. Default is **Active**.

Upload Logo

- Upload a profile logo or image using drag-and-drop or the upload button.
    - Accepted formats: SVG, PNG, JPG, GIF.
    - Maximum size: 800x400 pixels.

User Role

- Select the role that defines the user's permissions:

    - **Admin**: Full access to all features.
    - **Create Invoice**: Permission to generate new invoices.
    - **View Invoice**: Can only view existing invoices.

Finalizing the User:

- Click **Add User** in the top-right corner to save.
- To cancel and return to the list, click **Cancel**.
- Use **Back to Users** (top-left) to exit without saving.

Best Practices:

- Ensure all required fields (*) are completed correctly.
- Use strong and unique passwords for new accounts.
- Assign roles carefully to manage access control effectively.
- Upload a user image for easier identification within the system.

Item List in Clix

The *Item List* feature in Clix Accounting Software allows you to view and manage all products or services currently in your inventory. This guide outlines how to access and use the Item List efficiently.

Accessing the Item List

1. Navigate to the sidebar on the left of the main dashboard.
2. Click **"Items"** to expand the submenu.
3. Select **"Item List"** to open the page.

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

- **Item Name**: Displays the product or service name.
- **Price**: The unit price of the item.
- **SKU**: The unique stock keeping unit code.
- **Stock Levels**: Quantity of the item currently in stock.
- **Status**: Shows whether the item is Active or Inactive.
- **Options Menu** ("..."): Additional actions like edit or delete.

Key Features

- **Search**: Use the search bar to locate items quickly.
- **Add Item**: Click the **"+ Add Item"** button (top-right) to create a new item.
- **Sort**: Use the “Sort By” dropdown to change the display order.
- **Filters**: Click the filter icon to narrow down the list by status, category, or stock levels.

Managing Items

- To view or edit an item, click on its name or use the options menu.
- The **Status** column helps identify available (Active) and unavailable (Inactive) items.

Best Practices

- Keep item records updated regularly to reflect accurate inventory.
- Maintain consistent SKU usage for better tracking and reporting.
- Periodically audit stock levels and status for accuracy and availability.

Adding a New Item in Clix

The *Add Item* section in Clix accounting software guides you through entering complete item details, including pricing and stock. This structured process ensures each item is set up accurately in your inventory.

Step 1: Navigate to Add Item Page

1. Click on **Items** in the left sidebar.
2. Select the **Item List** submenu.
3. Click the **Add Item** button on the right side of the screen.

Step 2: Item Information

Item Image

- Click the upload icon or drag-and-drop to add an image.
- Supported formats: SVG, PNG, JPG, GIF.
- Max size: 800x400 pixels.

Item Name*

- Enter the name of the item in your primary language.

Item Name (Arabic)*

- Enter the item's name in Arabic.

Business Type

- Select from the dropdown (default: B2B).

Short Description

- Provide a brief, one-line summary of the item.

Description

- Add a detailed explanation of item features and specifications.

Expandable Sections on the Right

- **Item Info**: Add additional data as needed.
- **Price**: Add price details (next step).
- **Stock**: Add stock details (final step).

Actions

- **Cancel**: Exit without saving.
- **Back**: Return to the item list.
- **Next**: Save and move to the Price step.

Step 3: Add Price Information

Selling Price*

- Enter the price in your default currency.

VAT Details*

- **VAT Type***:
  - Choose from: None, Standard Rated, Zero Rated, Exempt from VAT, Not Subject to VAT.
- **VAT Rate***:
  - If applicable, select the correct VAT percentage.

Actions

- **Cancel**: Exit and discard.
- **Back**: Return to Item Info.
- **Next**: Proceed to Stock step.

Progress Sidebar

- Item Info ✔
- Price **(highlighted)**
- Stock (next)

Step 4: Stock Details

Unlimited Stock Toggle

- Enable if no inventory tracking is needed.

SKU (Stock Keeping Unit)*

- Enter a unique identifier to manage inventory.

Alert Quantity

- Enter a number at which to trigger a low stock alert (default: 0).

Current Stock Quantity

- Input the current available quantity (default: 0).

Actions

- **Cancel**: Discard and exit.
- **Back**: Go back to Price.
- **Next**: Complete item creation.

Progress Sidebar

- Item Info ✔
- Price ✔
- Stock **(highlighted)**

Item Details Page

The *Item Details* page in Clix accounting software offers a complete view of a specific product or service listed in your inventory. It helps users monitor item-level information critical to sales, taxation, and stock management.

How to Access:

1. Go to the **Items** section from the main navigation.
2. Select any item from the list to open its details.

Key Components:

Top Section

- **Item Name**: Displayed prominently at the top of the page.
- **Manage Button**: Located at the top-right corner, this button allows users to edit item details or perform related actions.

Item Details Section

- **Item Category**: Displays the category the item belongs to (may be hidden if not defined).
- **Cost**: The purchase price of the item.
- **Selling Price**: The retail price set for sales.
- **Applicable Tax**: Shows the tax type applied to the item, if any.
- **Short Description**: A brief summary of the item's use or feature.
- **Description**: A more detailed explanation of the item (can be same as short description).

Item Status Section

- **Item Status**: Indicates whether the item is active or inactive.
- **Stock Tracking**: Shows if inventory tracking is enabled for this item.
- **SKU**: Unique identifier used for stock management.
- **Alert Quantity**: Threshold at which stock alerts are triggered.
- **Current Stock Quantity**: Displays real-time stock level.
-

Editing Details:

To update item information, either click on the **Manage** button or directly edit the relevant fields (where permitted). Always ensure the data is accurate to maintain inventory integrity and generate correct financial records.

Reasons Page

The *Reasons* page in Clix accounting software allows users to manage predefined reasons used throughout the system—primarily in credit note workflows. These reasons help standardize and categorize specific actions or justifications related to accounting records.

How to Access:

1. Navigate to the **Setup** section from the left sidebar.
2. Click on **Reasons** to open the page.

Key Components:

Header Area

- **Page Title**: "Reasons" is displayed at the top of the main content section.
- **+ Add Reason** Button: Located in the top-right corner to add a new reason entry.

Controls

- **Search Bar**: Quickly locate a specific reason by keyword.
- **Sort Options**: A dropdown labeled "Sort By: Default" allows sorting the list.
- **Filters**: Apply additional filtering to refine displayed results.

Reasons Table

This section lists all available reasons in a structured format:

- **Reason Name**: The title or label of the reason.
- **Reason Description**: A brief explanation of the reason.
- **Associated Category**: Indicates the category this reason is linked to (e.g., CREDIT_NOTE).
- **Status**: Shows whether the reason is currently active or inactive.
- **More Options ("...")**: Use this to edit or manage the specific reason entry.

Actions:

- **Add New Reason**: Click the **+ Add Reason** button and fill in the form fields.
- **Edit Existing Reason**: Click the "..." icon in the row of the reason you want to edit.

This page supports streamlined recordkeeping by maintaining consistent, well-defined reasons for accounting entries, especially those associated with credit notes.

Add Reason Page

The *Add Reason* page in Clix accounting software enables users to create and categorize new reasons used across accounting operations—especially for credit notes and related entries.

How to Access:

1. Navigate to **Setup > Reasons** from the left sidebar.
2. Click the **+ Add Reason** button on the *Reasons* list page.

Page Layout & Features:

Header Area

- **Page Title**: Displays "Add Reason".

- **Navigation**: Use **Back to Reasons list** (top-left) to return without making changes.

Action Buttons

- **Cancel**: Discards any entered data and returns to the Reasons list.
- **Add Reason**: Submits the form and creates the new reason (highlighted in green).

Reason Info Section:

- **Reason Name***: A required field for the title of the reason.
- **Reason Type***: A required dropdown to select the category or usage context (e.g., CREDIT_NOTE).
- **Reason Description***: A required text area to provide a detailed explanation.
- **Reason Description (Arabic)***: A required field for the Arabic version of the description.

Fields marked with an asterisk (*) must be completed to enable submission.

How to Add a Reason:

1. Enter the **Reason Name**.
2. Choose the **Reason Type** from the dropdown.
3. Fill in both the **Reason Description** and its **Arabic translation**.
4. Click **Add Reason** to save.

Use this page to ensure all accounting reasons are clear, categorized, and available in both English and Arabic for consistency across your financial operations.

Default Dashboard

The *Default Dashboard* in Clix accounting software offers a real-time snapshot of your business's key financial and operational metrics. It serves as the landing page after login, helping users quickly assess the overall performance and status of their organization.

Key Components:

Account Status Alert

- Located at the top of the dashboard, this section displays critical account notifications that may require user attention.

Financial Summaries

- **Total Invoice**: Displays the total monetary value and number of invoices issued.
- **Items**: Shows total item value and the number of active vs. deactivated items in inventory.
- **Total Client**: Indicates total client value, including a count of active and inactive clients.
- **Total Tax Collected**: Displays the cumulative tax collected and the number of taxable invoices.

Visual Insights

- **Invoice Overview**: A donut chart that breaks down invoice data over a selected time frame (e.g., last 12 months).
- **Top Trending Client**: Highlights key clients based on activity or revenue contribution.

Operational Status

- **Stock Status**: Summarizes current inventory availability.
- **Client Status**: Provides an overview of client activity and engagement levels.
- **Compliance Status**: Circular chart showing the proportion of approved, pending, and rejected transactions, helping maintain regulatory readiness.

AI Assistant

- An **Ask AI** button is available for quick insights, report generation, or help navigating features.

This dashboard is designed to streamline decision-making by centralizing vital information in one place, supporting better visibility, faster analysis, and improved control over business operations.

Create Invoice Page

The *Create Invoice* page in Clix accounting software enables users to generate detailed invoices for business transactions. This interface ensures accurate billing, VAT compliance, and flexibility in client and payment options.

Key Sections:

Business Info

- Automatically displays your registered business name, VAT number, phone number, and address.

Invoice Info

- **Select Device**: Choose the invoicing device (impacts client type availability).
- **Client Type**: Select the appropriate client type from the dropdown.
- **Invoice For**: Indicate the recipient of the invoice.
- **Payment Means Type Code**: Choose the method of payment (e.g., cash, bank transfer).

Invoice Information

- **Supply Date / Supply End Date**: Define the service or delivery period using the calendar picker.

Invoice Items

- **Add/Edit Items**: Add new line items or modify existing ones.
- **Amount**: Automatically calculates the total for all listed items.

Invoice Discount

- **Add New Discount**: Apply discounts by amount or percentage.
- **Invoice Discount**: Displays the calculated discount applied to the invoice.

Additional Details

- **Add Note**: Include any relevant notes or special terms related to the invoice.

Total Summary (Right Panel)

- **Subtotal**: Sum of all item values before discounts or taxes.
- **Subtotal with Discount**: Subtotal after applying discounts.
- **VAT**: Value-added tax based on applicable rates.
- **Invoice Discount**: Shows total discount applied.
- **Net Amount**: Final total payable by the client.

This page ensures that each invoice is comprehensive, accurate, and compliant with business and regulatory requirements.

Invoices List Page

The *Invoices List* page in Clix accounting software offers a centralized view of all generated invoices. It allows users to manage, search, filter, and take action on invoices efficiently, supporting effective billing and financial oversight.

Search and Filters

- **Search Bar**: Quickly find invoices by typing keywords, client names, or references.

- **Sort By**: Organize the list using a dropdown menu (e.g., by date, status).
- **Filters**: Apply filters such as date range, client type, or invoice status.

Summary Statistics

Four key financial indicators are displayed above the table:

- **Invoice Amount**: Total billed amount.
- **Tax Amount**: Sum of VAT collected.
- **Amount Excluding Tax**: Subtotal before taxes.
- **Discount Amount**: Total value of discounts applied across invoices.

All amounts are displayed in the system’s default currency (e.g., SAR).

Invoice List Table

Each row represents an invoice and includes:

- **Ref**: Unique reference number.
- **Client Name**: The customer linked to the invoice.
- **Creation Date**: When the invoice was issued.
- **Due Date**: Payment deadline.
- **Net Amount**: Final amount due after taxes and discounts.
- **Counter**: Internal invoice identifier.
- **Invoice Status**: Shows if the invoice is cleared, pending, or overdue.
- **More Options (...)**: Access actions such as view, edit, or cancel.

Pagination

- Located at the bottom, this section shows the current page and total record count.

- Navigation controls help you move between pages.

This page ensures a streamlined workflow for tracking invoice activity and maintaining financial records.

Invoice Details Screen

The *Invoice Details* screen in Clix accounting software provides a full overview of an individual invoice, allowing users to view, verify, and reference all invoice-related data from a single location.

Tabs

- **Invoice Details**: Displays all billing and transaction information.
- **Attachments**: Allows viewing or adding related documents (e.g., receipts, proof of delivery).

Invoice Information

- **Date, Time, Due Date**: Clearly shown near the top of the page.
- **Sender Details**: Includes business name, VAT number, and contact information.
- **Recipient Details**: Shows client's name, address, and VAT info if applicable.

Itemized List

Each invoiced item is presented with:

- **Description**
- **Price**
- **Quantity**
- **VAT**

- **Total** (price x quantity + VAT)

Financial Summary

- **Subtotal**: Total before any discounts or tax.
- **Discount**: Value deducted from the subtotal.
- **VAT**: Calculated VAT based on applicable rate.
- **Net Amount**: Final payable amount (displayed prominently).

Additional Features

- **Notes Section**: Space for comments, terms, or custom messages.
- **QR Code**: Typically used for digital verification or payment.
- **Branding & Version Info**: Displays Clix software version and branding for authenticity.

This screen ensures full transparency for both internal users and clients, making it easy to review the breakdown and totals of any invoice.

Client List

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 on the right
- "Filters" button to refine the displayed results the right

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)

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.

Client Detail

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

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

3. 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

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

Top right corner has manage dropdown which can be used to edit or update client information

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

Edit Client Details

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.

Features:

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

2. 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

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

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

5. Contact Info:
  - Fields for contact person name (in English and Arabic)
  - Email field

- Phone number field with country code selector

6. 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)

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

8. 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.

Add new client

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

2. 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

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

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

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

- Email and phone number with country code selection

6. 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

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.

View Client Group

1. Page header:
   - Various clients can be grouped into a client group
   - Each group can be edited from by clicking on the three dots
   - "Manage" dropdown button in the top right, likely for actions related to this group

2. 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 with an icon
       - Industry
       - Organization ID Type
       - VAT Group
       - VAT Number

This 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.

Client Group Main Page

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

1. Page header:
   - "Client Group" title

   - "Add Client Group" button in the top right corner

2. 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

3. 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

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

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.

Create Client Group

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

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

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

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

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.

Credit Note List Page

The *Credit Note List* page in Clix Accounting Software provides a centralized interface for viewing and managing all issued credit notes. It is designed to give users quick insights and control over credit note records, complete with search, filter, and sorting capabilities.

Key Features:

1. **Create Credit Note:**
   - A clearly visible **"Create Credit Note"** button in the top-right corner enables users to initiate the creation of a new credit note.
2. **Search Bar:**
   - Located at the top of the page, the **search field** helps quickly locate specific credit notes using relevant keywords.
3. **Sorting and Filtering:**
   - The **"Sort By"** dropdown allows sorting based on fields like date or amount.
   - The **"Filters"** option provides advanced filtering to narrow down results based on defined criteria.
4. **Summary Statistics:**
   - Displayed at the top, the page shows total values for:
     - **Credit Note Amount**
     - **Tax Amount**
     - **Amount Excluding Tax**
     - **Discount Amount**
5. **Detailed List View:**
   - Each row in the table includes:
     - **Client Name**

        - **Creation Date**
        - **Due Date**
        - **Net Amount**
        - **Counter Number**
        - **Invoice Status** (color-coded for easy recognition)

6. **Pagination Controls:**
    - Users can navigate through multiple pages of credit notes using the controls at the bottom.
7. **Currency Display:**
    - All financial figures are shown with the appropriate **currency code** (e.g., SAR) for transparency and clarity.
8. **Status Indicators:**
    - The **Invoice Status** column uses **color-coded tags** to represent different states such as issued, pending, or canceled.

This page is an essential tool for finance teams to monitor, audit, and manage credit notes efficiently within the Clix accounting system.

Credit Note Details Page

The *Credit Note Details* page in Clix Accounting Software offers a complete view of a specific credit note. Users can review invoice references, itemized entries, and financial summaries, ensuring accurate record-keeping and transparency for every issued credit note.

Key Features:

1. **Credit Note Identifier:**
    - A unique reference number is prominently displayed at the top for tracking purposes.

2. **Language Toggle:**
   - A **"To Arabic"** button enables quick switching between English and Arabic interfaces.
3. **Tabbed Interface:**
   - Organized into **"Credit Note Details"** and **"Attachment"** tabs for structured access to data and supporting documents.
4. **Invoice Information:**
   - Displays the source invoice's **number, date, time,** and **due date**.
   - Includes **Invoice From** and **Invoice To** sections with company names and contact details.
5. **Item Details:**
   - A table lists all credited items with columns for:
     - **Description**
     - **Price**
     - **Quantity**
     - **VAT**
     - **Total**
     - **Total with VAT**
6. **Financial Summary:**
   - Includes:
     - **Subtotal**
     - **Subtotal with Discount**
     - **Discount Amount**
     - **VAT Amount**

        - **Net Amount** (highlighted for clarity)

7. **Notes Section:**
    - A free-text area to include additional information or context about the credit note.
8. **QR Code:**
    - A QR code is displayed for fast, mobile access to the credit note.
9. **Current User Info:**

- Shows the logged-in user's **name** and **email** at the bottom of the sidebar.

This page provides users with a centralized, detailed view of credit note data, supporting compliance, transparency, and efficient client communication.

Create Credit Note Page

The *Create Credit Note* page in Clix Accounting Software enables users to generate a new credit note by selecting one or more invoices and providing required transaction details. This ensures accurate adjustments to billing records and maintains compliance with financial procedures.

Key Features:

1. **Navigation:**
    - **Back to Credit Note List**: Allows users to return to the list of existing credit notes.
    - The left-hand **sidebar** provides access to other modules within Clix.
2. **Page Actions:**
    - **Cancel**: Discards any unsaved changes and exits the credit note creation process.
    - **Issue Note**: Finalizes and submits the credit note.
3. **Credit Note For:**

    - A **search bar** allows lookup of invoices using invoice number or client name.
    - A **filter icon** enables advanced search options to narrow down invoice selection.
4. **Selected Invoices:**
    - Shows how many invoices have been selected (initially 0).
    - Displays a message: *"No Invoices selected yet"* until selections are made.
    - Provides guidance: *"Select invoices to start edit items inside it."*
5. **Credit Note Information:**
    - **Supply Date**: Use the date picker to specify the original supply date.
    - **Supply Due Date**: Set the due date using the calendar picker.
6. **Payment and Reason Details:**
    - **Payment Means Type Code**: Dropdown to select the method of payment (e.g., bank transfer, cash).
    - **Reason Dropdown**: Select a reason for issuing the credit note, ensuring proper classification.
7. **User Information:**
    - The currently logged-in user's **name** and **email** are shown at the bottom of the sidebar for reference.

This structured interface streamlines the credit note creation workflow, making it simple to select invoices, define key dates, and record payment and reason details for accurate documentation.

Business

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.

5. 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.

6. 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.

Edit Business Page

The *Edit Business* page in Clix Accounting Software enables users to update key details of a registered client business. This form-driven interface ensures all essential business data is maintained accurately and can be modified with ease.

Key Features:

1. **Page Actions:**
    - **Cancel**: Discards unsaved changes.
    - **Save Changes**: Saves the updated business information.
2. **Client Information Section:**
    - Business Name in both **English** and **Arabic**.
    - **Industry** dropdown to classify the business sector.
    - **Website** field for entering the company's URL.
    - **Business ID Type** and **Business ID Number** to record official registration details.
    - **VAT Group Number** and **VAT Number** (these fields may be read-only depending on permissions).
    - **Phone Number** field with country code support.
3. **Upload Business Logo:**
    - Drag-and-drop area to upload or replace the company's logo.
4. **Business Address Section:**
    - **Interactive Map** for pinpointing business location.
    - Fields for **Country**, **State**, **City**, **Postal Code**, **Building Number**, and **Address Line**.

5. **Fatora Devices:**
    - Displays a list of registered Fatora devices associated with the business.
    - Each entry includes **Device Name**, **Branch**, **Status**, and available actions.
    - Use the **Add Device** button to register new hardware.
6. **Current User Info:**
    - Logged-in user's **name** and **email** shown at the bottom of the sidebar.

This page is designed for complete management of business details, allowing users to ensure data consistency, address accuracy, and compliance with regulatory identifiers such as VAT and CR numbers.

Users List

The **Users List** page in Clix Accounting Software lets administrators view and manage all user accounts in one place.

Overview
On this page, you can quickly locate, sort, filter, and take actions on user records.

Key Sections

1. **Navigation**
    - Use the left-hand menu to switch between modules; "User Management" is highlighted when you're on this page.
    - Click the collapse/expand icon at the top of the sidebar to adjust its width.
2. **Page Header**
    - The title **Users List** appears at the top.
    - Click **Add User** in the top-right corner to open the New User form.
3. **Search**

- Enter a name or email in the search field above the table to quickly find a specific user.

4. **Sort & Filter**
    - Use the **Sort By** dropdown to reorder the list (e.g., by name, date added).
    - Click **Filters** to narrow the list by status, role, or other criteria.

5. **User Table**
    - Displays each user's:
        - **Username** (their login email)
        - **Email Address**
        - **Last Login Date & Time**
        - **Account Status** (e.g., Active, Suspended)
    - Click the "…" menu at the end of a row to edit, deactivate, or reset the password for that user.

Edit Item

The **Edit Item** page in Clix Accounting Software enables you to update and manage the details of items in your inventory. This feature ensures your product information remains accurate and up to date.

How to Use the Edit Item Page

1. **Item Name**
   Enter the product name in **English**. This is a **required field** and will appear on invoices and reports.

2. **Item Name (Arabic)**
   Provide the product name in **Arabic**. This is also a **required field**, especially for compliance with local language requirements.

3. **Business Type**
   This field is auto-filled based on your account settings and **cannot be edited** from this

page.

4. **Short Description**
   Add a brief description of the item. Use this field to give a quick summary of the item's purpose or key features.

5. **Description**
   Include a detailed explanation of the item, such as product features, specifications, or typical use cases.

6. **Price**

   ○ **Selling Price**: Enter the item's sale price. This field is **required** and must be a numeric value.

7. **VAT Settings**

   ○ **VAT Type**: Select the applicable VAT category from the dropdown menu (e.g., *Standard Rated*).

   ○ **VAT Rate**: This is automatically calculated based on the selected VAT type.

8. **Item Image**
   Upload an image of the item by either clicking the upload area or dragging and dropping your file.

   ○ Supported formats: SVG, PNG, JPG, GIF

   ○ Recommended size: **800x400 px**

9. **Item Status**
   Set the current availability of the item:

   ○ **Active**: The item is available for sale.

   ○ **Inactive**: The item is hidden from sales and inventory views.

10. **Stock Management**

- **Unlimited Stock**: Toggle this on if the item is not quantity-restricted.
- **SKU (Stock Keeping Unit)**: Define a unique identifier or code used for inventory tracking.