

## Adding Two Tax rates

<b>Prepared By:</b>	Rasiga Priya
<b>Designed By:</b>	Sarath
<b>Feature requested by:</b>	Saba, Ajay
<b>Stakeholder:</b>	DecorST, Vista Blinds canada
<b>Ticket ID:</b>	REQ-I2181
<b>Created Date:</b>	Jan 29, 2026

**Prototype:** [Figma link](#)

### 1.1 Purpose

This document describes the restructuring of the existing Invoice and Tax configuration within the system. The objective is to relocate tax-related configurations from System Settings to Company Settings and ensure all tax and financial configurations are managed per organization.

### 1.2 Overview

The Invoice and Tax section currently available in System Settings will be modified. Tax-related configurations including Standard Tax, Zip Code Tax, and Product Tax will be moved under Company Settings within a new section titled **Financial & Tax Setup**. The Invoice Info section will remain in System Settings as an independent configuration module.

All tax and financial configurations will be organization specific.

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Settings

- Company settings**
  - Application setup
  - Company profile
  - Financial & Tax setup**
  - Country
  - Currency conversion
  - Payment configuration
  - Language setup
  - Social media links
  - Terms & Conditions
- System settings**
  - User & Roles
  - Invoice info**
  - Price setup
  - Delivery setup
  - Restore
  - Log history
- Calendar settings**
  - Calendar setup
  - Appointment types
  - Checklist
- Status**
  - Job status
  - Order status
- Product configuration**
  - Products
  - Options & Materials
  - Pricing groups
  - Field types
  - Pricing types & Unit types
  - Supplier
- Workroom setup**
  - Product workflow
  - Stations & Barcodes
  - Optimization setup
  - User allocation
  - Production storage configuration
- Communication**
  - Email
  - Text message
- Report setup**
  - Reports & Templates
- Automation**
  - Automation rules
- Customization forms**
  - Modules
  - Field settings
- Online ordering setup**
  - Online ordering settings
  - Trade user setup
- Version setup**
  - Version setup
- Website setup**
  - E-commerce products
  - SEO
  - Coupons

Content scale: Fit width and height

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Settings > **Financial & Tax setup**

Menu <<

- Application setup
- Company profile
- Financial & Tax Setup**
- Country
- Currency conversion
- Payment configuration
- Language setup
- Social media links
- Terms & conditions

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**Tax configuration**

Tax type:  Single  Dual | Tax display name: VAT

Default sales tax: Standard tax

**Standard tax** | Zipcode tax | Product tax

**VAT** + Add VAT

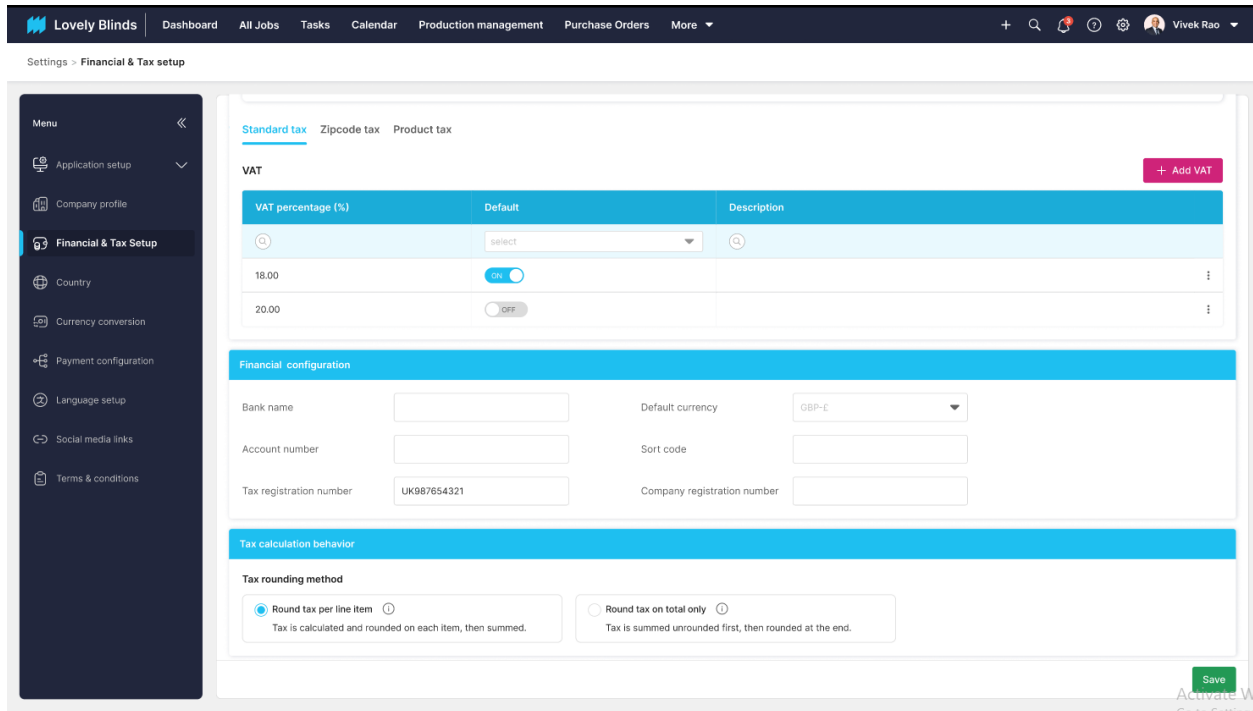
VAT percentage (%)	Default	Description
18.00	<input checked="" type="checkbox"/>	
20.00	<input type="checkbox"/>	

**Financial configuration**

Bank name:  | Default currency: GBP-£

Account number:  | Sort code:

Save

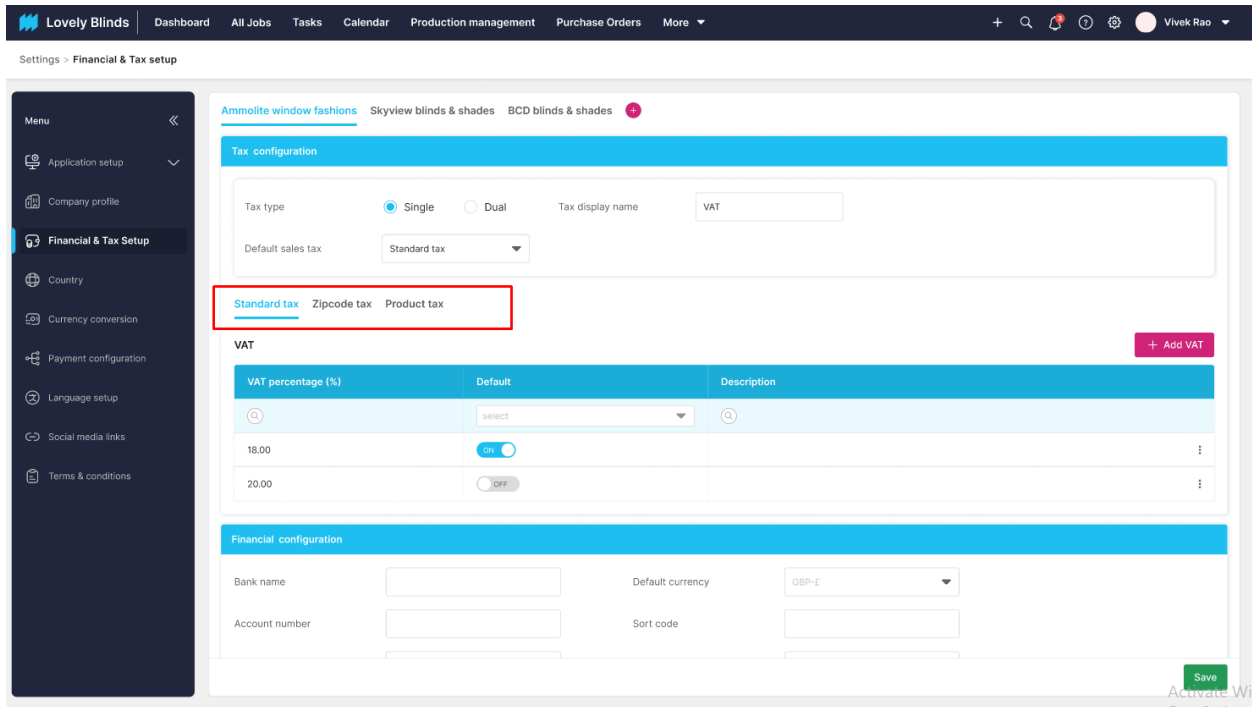


## 2. System Changes Overview

### 2.1 Removal from System Settings

The existing **Invoice and Tax** combined section will be removed from System Settings.

Only the **Invoice Info** section will remain under System Settings as a separate standalone section.



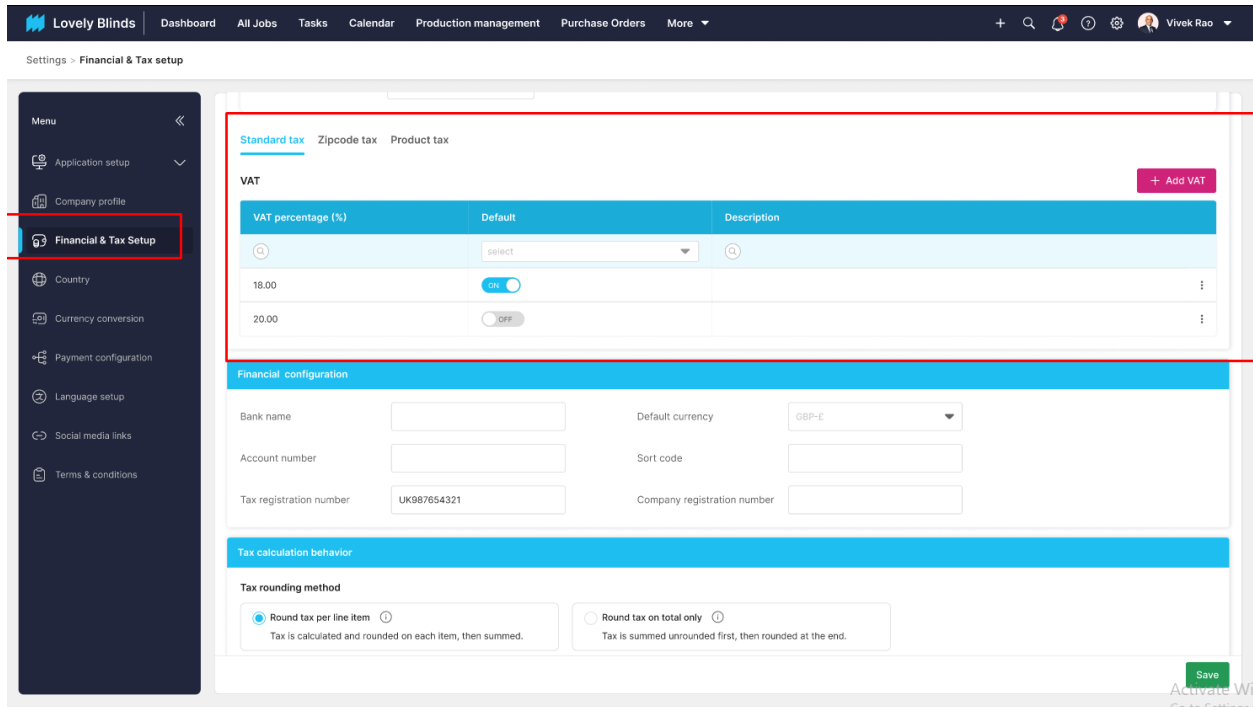
## 3. Company Settings – Financial & Tax Setup

### 3.1 New Section Creation

A new section titled **Financial & Tax Setup** will be added under the Company Settings module.

Clicking on this section will open the Tax and Financial configuration page for the selected organization.

All configurations within this page will apply only to the selected organization.



## 4. Tax Configuration

### 4.1 Tax Type Selection

Within the Financial & Tax Setup page, users can configure the tax type for the organization.

Two tax types are supported:

- **Single Tax**
- **Dual Tax**

By default, **Single Tax** will be selected for all organizations.

Settings > Financial & Tax setup

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**Tax configuration**

Tax type:  Single  Dual

Tax display name: VAT

Default sales tax: Standard tax

**Standard tax** Zipcode tax Product tax

**VAT** + Add VAT

VAT percentage (%)	Default	Description
18.00	<input checked="" type="radio"/> ON	
20.00	<input type="radio"/> OFF	

**Financial configuration**

Bank name:

Account number:

Default currency: GBP-E

Sort code:

Save

Settings > Financial & Tax setup

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**Tax configuration**

Tax type:  Single  Dual

Tax 1 display name: VAT

Tax 2 display name: GST

Default sales tax: Standard tax

**Standard tax** Zipcode tax Product tax

**VAT** + Add VAT

VAT percentage (%)	Default	Description
18.00	<input checked="" type="radio"/> ON	
20.00	<input type="radio"/> OFF	Standard UK VAT rate

**GST** + Add GST

GST percentage (%)	Default	Description
5.00	<input checked="" type="radio"/> ON	Standard UK GST rate

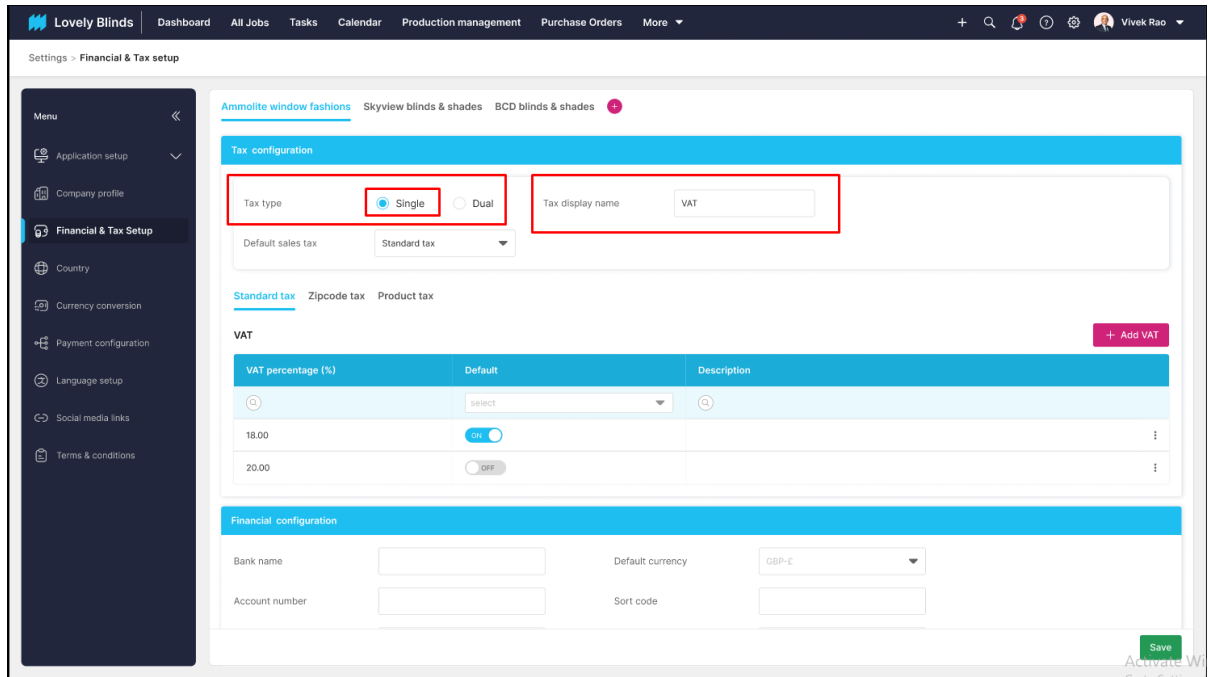
Save

## 4.2 Single Tax Configuration

When Single Tax is selected:

- Only one **Tax Display Name** field will be shown.

- The display name can be manually entered (e.g., VAT).
- A **Default Sales Tax** dropdown will be available for selection.
- Only one tax configuration section will be displayed.



The tax configuration section will include:

- Standard Tax Rates – any one of the tax rates can be made by default.
- Zip Code Tax Rates
- Product Tax Rates

- Menu
- Application setup
- Company profile
- Financial & Tax Setup**
- Country
- Currency conversion
- Payment configuration
- Language setup
- Social media links
- Terms & conditions

**Tax configuration**

Tax type:  Single  Dual Tax display name: VAT

Default sales tax: Standard tax

**Standard tax** | Zipcode tax | Product tax

VAT

VAT percentage (%)	Default	Description
18.00	<input checked="" type="checkbox"/>	
20.00	<input type="checkbox"/>	

**Financial configuration**

Bank name:  Default currency: GBP-£

Account number:  Sort code:

[+ Add VAT](#)

[Save](#)

- Menu
- Application setup
- Company profile
- Financial & Tax Setup**
- Country
- Currency conversion
- Payment configuration
- Language setup
- Social media links
- Terms & conditions

**Tax configuration**

Tax type:  Single  Dual Tax display name: VAT

Default sales tax: Standard tax

**Standard tax** | Zipcode tax | Product tax

VAT

VAT percentage (%)	Default	Description
18.00	<input checked="" type="checkbox"/>	
20.00	<input type="checkbox"/>	

**Financial configuration**

Bank name:  Default currency: GBP-£

Account number:  Sort code:

[+ Add VAT](#)

[Save](#)

**Add standard tax rate**

Organization name: Ammolite window fashions

VAT percentage (%): 18.00

Description (optional): enter here...

Default:  off

[Save](#) [Cancel](#)

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Settings > Financial & Tax setup

Menu <<

- Application setup
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- Payment configuration
- Language setup
- Social media links
- Terms & conditions

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### Tax configuration

Tax type:  Single  Dual | Tax display name: VAT

Default sales tax: Standard tax

Standard tax: **Zipcode tax** | Product tax

VAT + Add VAT

Conditions	Zip code	VAT percentage (%)
Starts with	T0J-0A0	6.00
Starts with	TOA - T9X	7.00

### Financial configuration

Bank name: | Default currency: GBP-£

Account number: | Sort code: |

Save

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Settings > Financial & Tax setup

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### Tax configuration

Tax type:  Single  Dual | Tax display name: VAT

Default sales tax: Standard tax

Standard tax: Zipcode tax | Product tax

VAT + Add VAT

Conditions	Zip code	VAT percentage (%)
Starts with	T0J-0A0	6.00
Starts with	TOA - T9X	7.00

### Financial configuration

Bank name: | Default currency: GBP-£

Account number: | Sort code: |

Save

**Add zipcode tax rate** ✕

Organization name: Ammolite window fashions

Conditions: Select

Zip code: Starts with

VAT percentage (%): Equals

Description (optional): enter here...

Save Cancel

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Settings > Financial & Tax setup

Menu <<
 

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- Company profile
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- Currency conversion
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**Tax configuration**

Tax type:  Single  Dual | Tax display name: VAT

Default sales tax: Standard tax

Standard tax | Zipcode tax | **Product tax**

VAT + Add VAT

Product name	Product code	VAT percentage (%)
Roller blind	066	6.00
Vertical blind	786	7.00

**Financial configuration**

Bank name: | Default currency: GBP-£

Account number: | Sort code:

Save

Lovely Blinds | Dashboard | All Jobs | Tasks | Calendar | Production management | Purchase Orders | More | + | 🔍 | 🕒 | ⚙️ | 👤 Vivek Rao

Settings > Financial & Tax setup

Menu <<
 

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- Company profile
- Financial & Tax Setup**
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- Currency conversion
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**Tax configuration**

Tax type:  Single  Dual | Tax display name: VAT

Default sales tax: Standard tax

Standard tax | Zipcode tax | **Product tax**

VAT + Add VAT

Product name	Product code	VAT percentage (%)
Roller blind	066	6.00
Vertical blind	786	7.00

**Financial configuration**

Bank name: | Default currency: GBP-£

Account number: | Sort code:

Save

**Add product tax rate** ✕

Organization name: Ammolite window fashions

Product name: Roller blinds

Product code: 786

VAT percentage (%): 05.00

Description (optional): enter here...

Save Cancel

All rates configured under this section will belong to the single tax type defined.

### 4.3 Dual Tax Configuration

When Dual Tax is selected:

- Two display name fields will be shown:
  - Tax 1 Display Name
  - Tax 2 Display Name
- The user can manually enter names for both taxes (e.g., VAT and GST).

Based on this selection:

- Two separate tax configuration sections will be displayed:
  - Tax 1 Configuration
  - Tax 2 Configuration

Settings > Financial & Tax setup

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**Tax configuration**

Tax type  Single  Dual Tax 1 display name VAT Tax 2 display name GST

Default sales tax Standard tax

Standard tax Zipcode tax **Product tax**

**VAT** + Add VAT

Product name	Product code	VAT percentage (%)
Roller blind	066	6.00
Vertical blind	786	7.00

**GST** + Add GST

Product name	Product code	GST percentage (%)
Roller blind	066	5.00

Save

Each tax section will include:

- Standard Tax Rates
- Zip Code Tax Rates

- Product Tax Rates

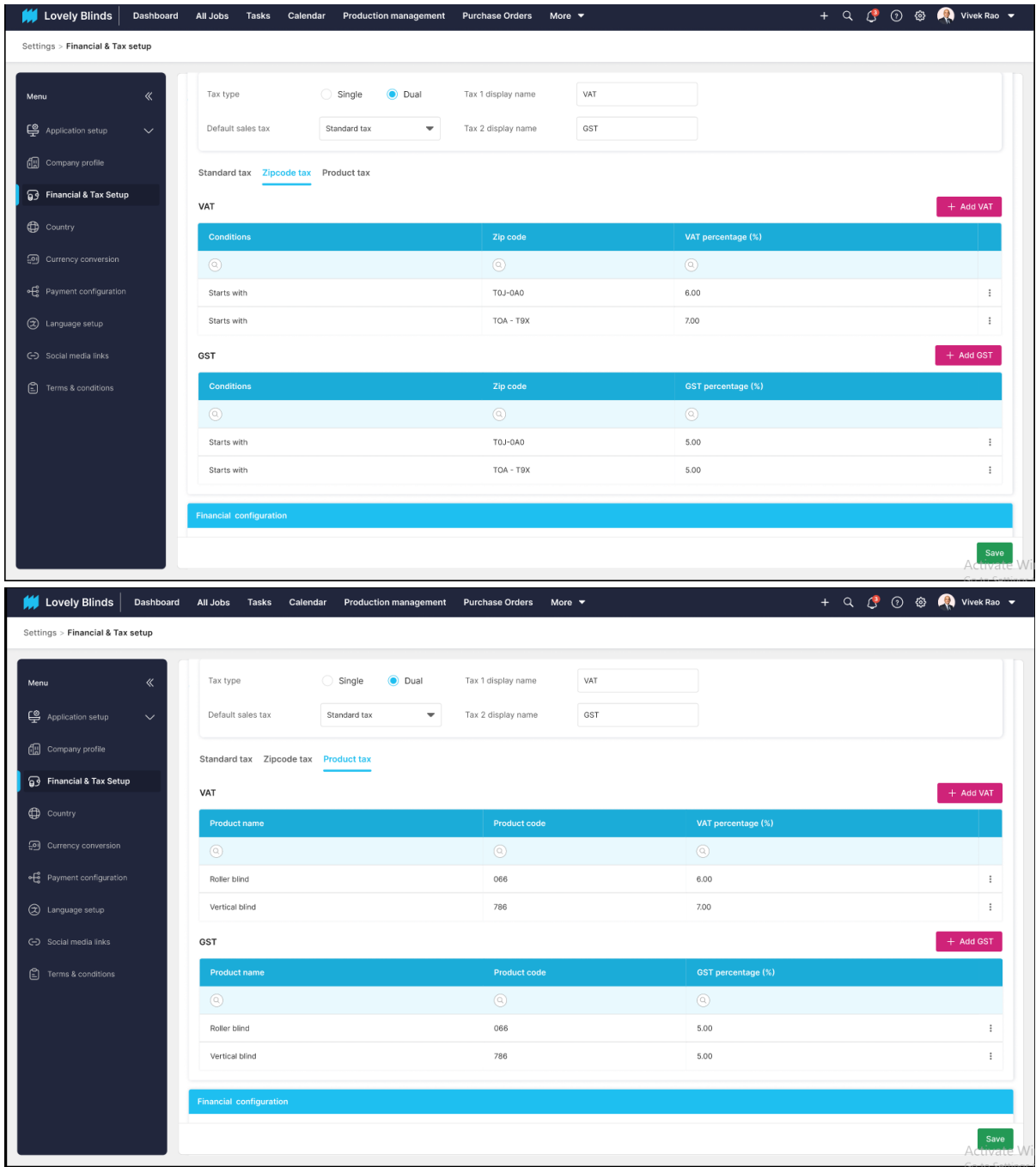
The screenshot displays the 'Financial & Tax setup' interface. At the top, the navigation bar includes 'Lovely Blinds', 'Dashboard', 'All Jobs', 'Tasks', 'Calendar', 'Production management', 'Purchase Orders', and 'More'. The user 'Vivek Rao' is logged in. The left sidebar lists various settings: Menu, Application setup, Company profile, Financial & Tax Setup (highlighted), Country, Currency conversion, Payment configuration, Language setup, Social media links, and Terms & conditions.

The main content area is titled 'Settings > Financial & Tax setup'. It features a 'Tax type' section with 'Single' and 'Dual' radio buttons, where 'Dual' is selected. Below this, 'Default sales tax' is set to 'Standard tax'. 'Tax 1 display name' is 'VAT' and 'Tax 2 display name' is 'GST'. There are tabs for 'Standard tax', 'Zipcode tax', and 'Product tax', with 'Standard tax' being the active tab.

The 'VAT' section includes a '+ Add VAT' button and a table with columns 'VAT percentage (%)', 'Default', and 'Description'. The table contains two rows: one with a percentage of 18.00 and a toggle set to 'ON', and another with 20.00 and a toggle set to 'OFF', with the description 'Standard UK VAT rate'.

The 'GST' section includes a '+ Add GST' button and a similar table with columns 'GST percentage (%)', 'Default', and 'Description'. It contains two rows: one with a percentage of 5.00 and a toggle set to 'ON', and another with 5.00 and a toggle set to 'OFF', with the description 'Standard UK GST rate'.

At the bottom of the page, there is a 'Financial configuration' section and a green 'Save' button.



All configurations for Tax 1 and Tax 2 are independent but specific to the same organization.

## 5. Adding Tax Rates

Each tax configuration section (Single or Dual) will provide an **Add** button to add tax rates.

The following types of tax rates can be added:

- Standard Tax Rate
- Zip Code Tax Rate
- Product Tax Rate

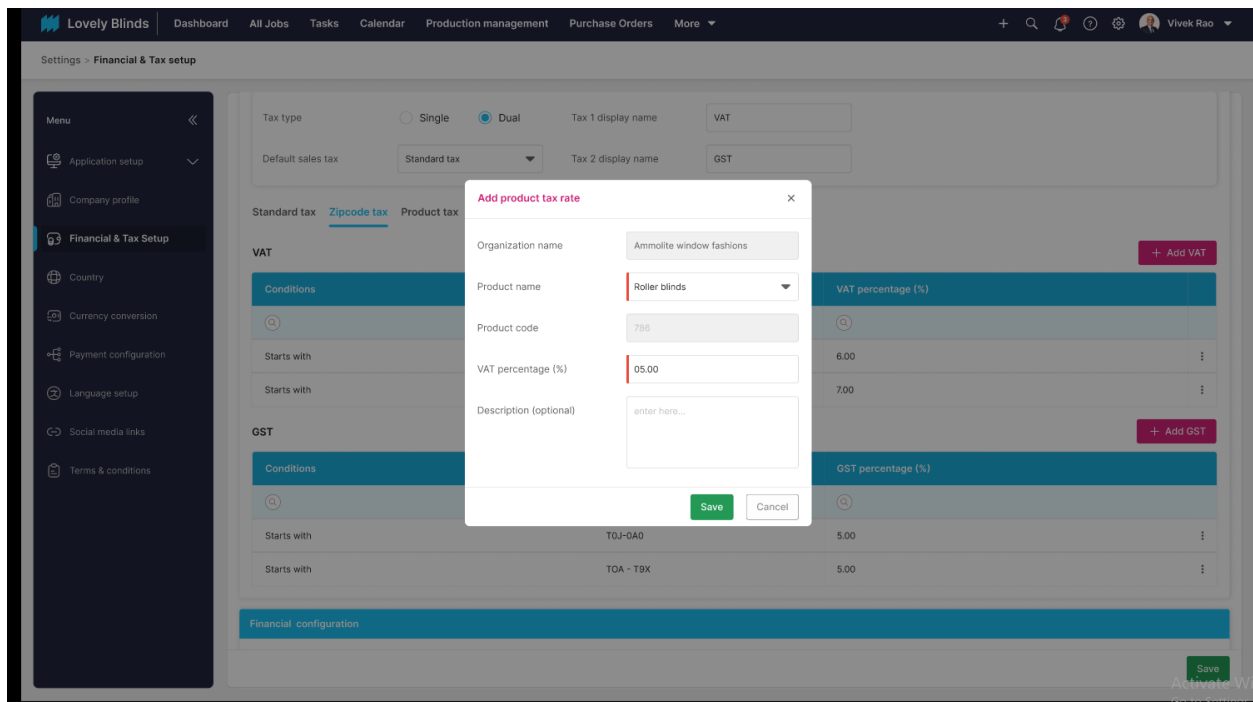
Screens provided above.

## 5.1 Add Product Tax Rate

When the user clicks on **Add Product Tax**, a popup window will open.

The popup will contain:

- Organization Name (auto-fetched and non-editable)
- Product Name (single selectable from dropdown)
- Tax Percentage field (manual numeric entry)



Upon clicking Save:

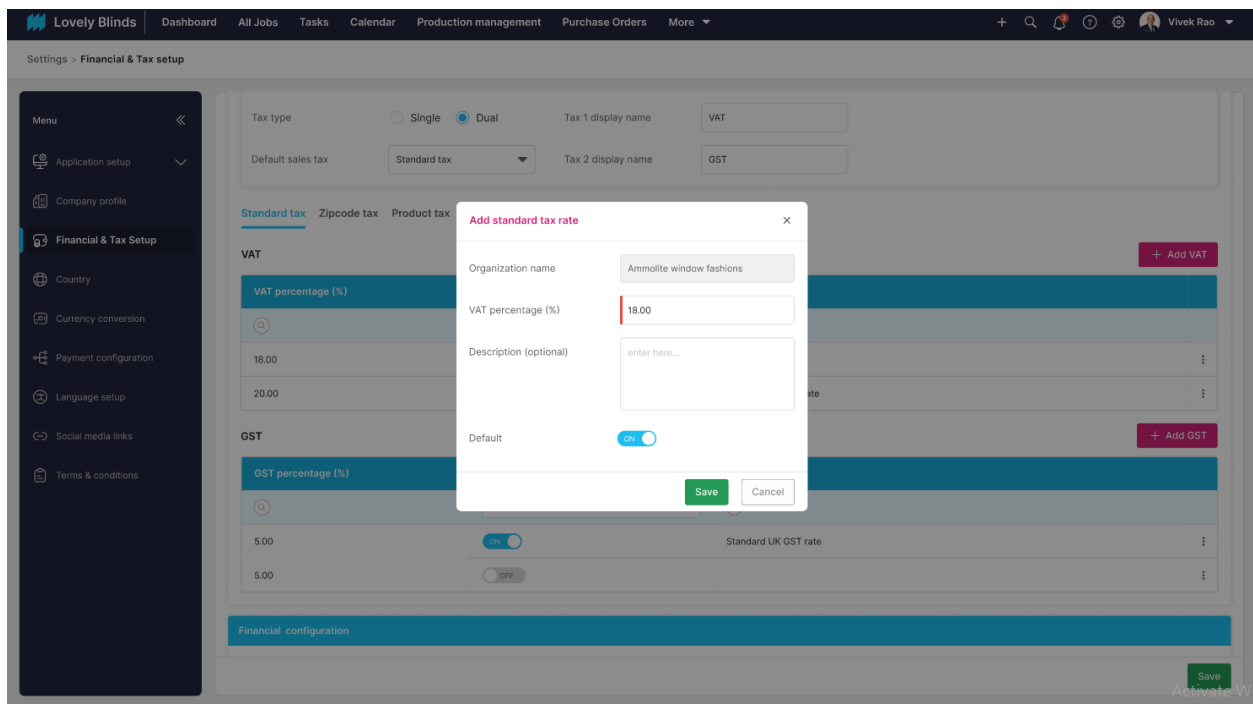
- A new tax rate entry will be created for the selected organization.
- The entry will appear in the respective tax section.

## 5.2 Add Standard Tax Rate

Clicking on **Add Standard Tax** will open a popup where:

- Organization Name is auto fetched.
- Tax Percentage is entered manually.

On saving, the new standard tax rate will be added for that organization.



## 5.3 Add Zip Code Tax Rate

Clicking on **Add Zip Code Tax** will open a popup where:

- Organization Name is auto fetched.
- Zip/Post Code is entered manually.
- Tax Percentage is entered manually.

On saving, the new zip code tax rate will be added to the respective tax section.

## 5.4 Dual Tax Add Behavior

If Dual Tax is configured:

- Each tax section (Tax 1 and Tax 2) will have its own Add options.
- For example, clicking on **Add GST** (Tax 2) will open the same type of popup for configuring Standard, Zip Code, or Product tax rates for GST.

Each tax rate will be saved independently under its respective tax section.

## 6. Tax Rate Management

For each tax rate entry displayed in the grid/list:

A three-dot (:) options menu will be available.

Delete action will be supported within this.

### Delete Tax

Selecting Delete will remove the selected tax rate of entry from the system (subject to validation and dependency checks).

## 7. Tax Calculation Behavior

The **Tax Calculation Behavior** section, which is already available and working in the live system, will remain unchanged.

This section will appear at the bottom of the Financial & Tax Setup page (**Refer to Figma**).

No modification in logic is introduced as part of this change.

The screenshot displays the 'Financial & Tax setup' page. The top navigation bar includes 'Lovely Blinds' and various system navigation options. The sidebar menu on the left lists settings categories, with 'Financial & Tax Setup' highlighted. The main content area is titled 'Settings > Financial & Tax setup' and contains three primary sections:

- GST:** A table with columns for 'GST percentage (%)', 'Default', and 'Description'. It lists 'Standard UK VAT rate' and 'Standard UK GST rate' with their respective percentages and toggle states.
- Financial configuration:** A section containing input fields for 'Bank name', 'Account number', 'Tax registration number', 'Default currency', 'Sort code', and 'Company registration number'. A red horizontal line is drawn below this section.
- Tax calculation behavior:** A section with radio buttons for 'Round tax per line item' (selected) and 'Round tax on total only'.

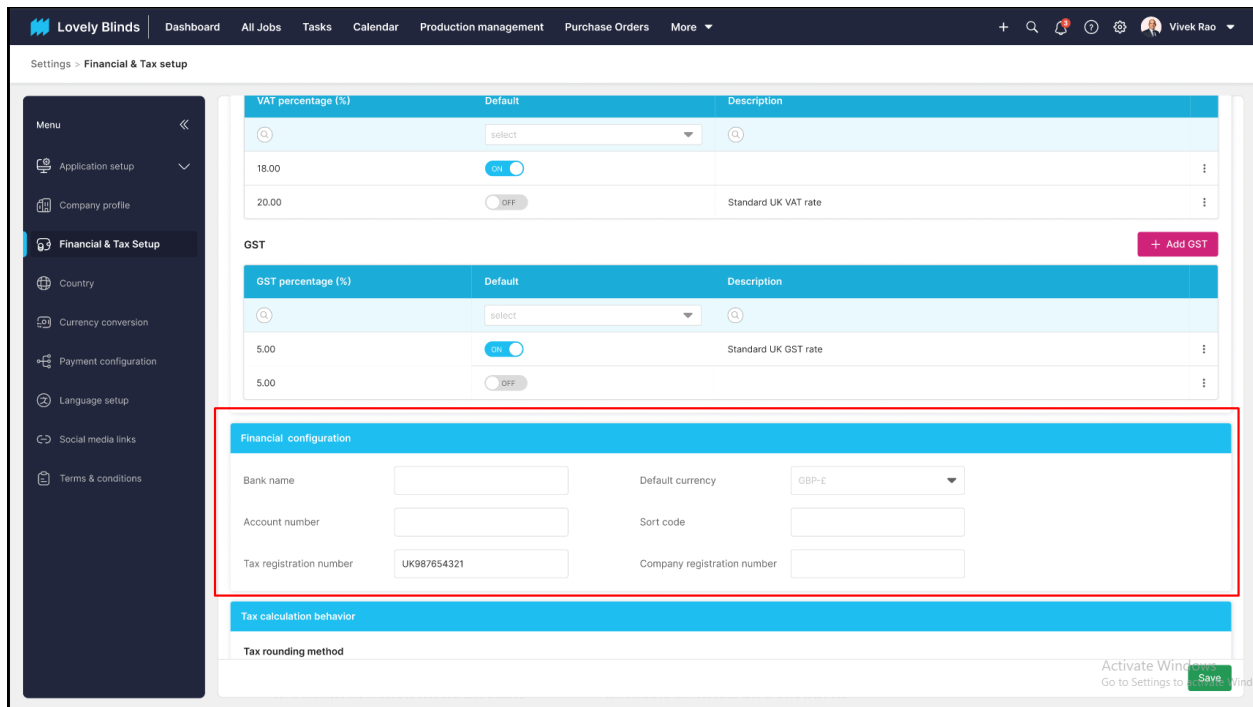
A 'Save' button is located at the bottom right of the page.

## 8. Financial Configuration (Bank Details)

The Financial Configuration section, which allows entry of bank details, will be moved next to the tax configuration section (**Refer Figma**) to the bottom of the Financial & Tax Setup page.

Bank details will be configured separately for each organization.

All financial information saved here will be organization specific.



## 9. Organization-Specific Configuration

All configurations under Financial & Tax Setup are specific to each organization, including:

- Tax Type (Single/Dual)
- Tax Display Names
- Default Sales Tax
- Standard Tax Rates
- Zip Code Tax Rates
- Product Tax Rates
- Tax Calculation Behavior
- Bank Details

No configuration will be shared across organizations

## Invoice Impact

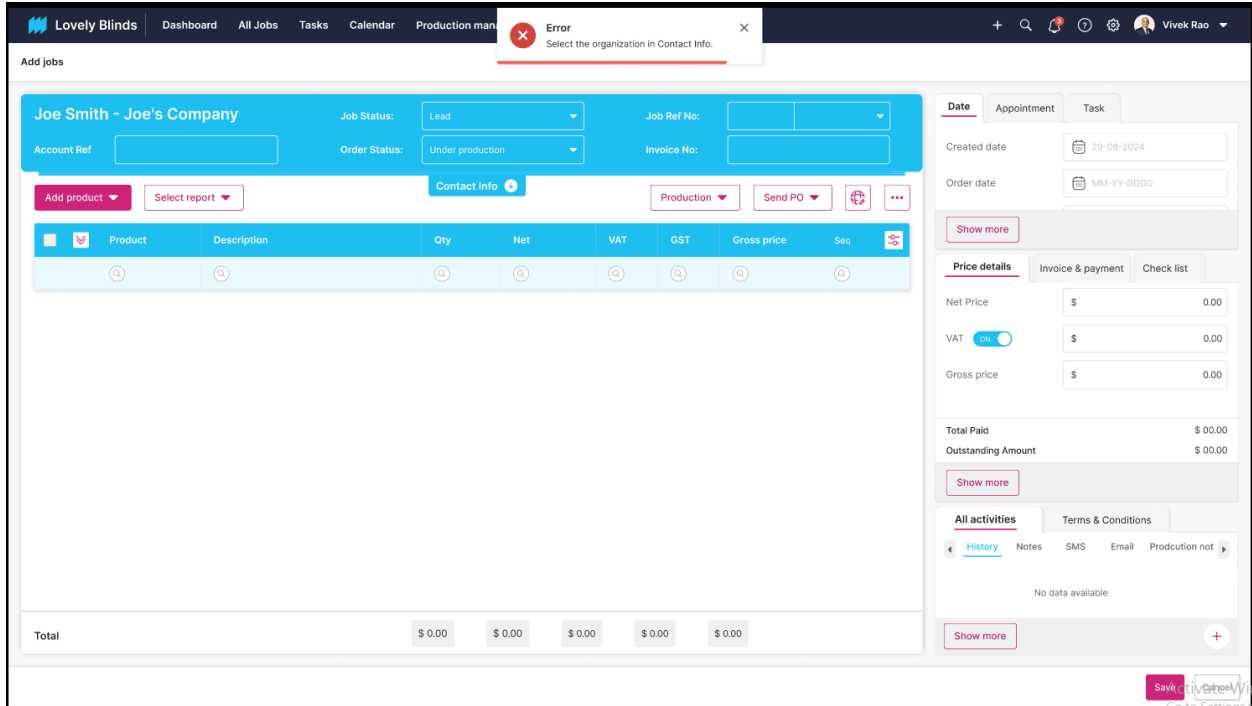
- Tax display names entered in configuration must reflect correctly invoice screens and documents.
- Existing invoices must retain historical tax values.
- **A separate Default Sales Tax selection will be available for Tax 1.**
- **A separate Default Sales Tax selection will be available for Tax 2.**

Each default value will apply only to its respective tax type and will function independently within the organization's configuration.

**A product can be added to a job only after an organization is selected within the Contact Info section. This ensures consistency in pricing and tax calculations.**

**If no organization is selected, the system will display a toast notification prompting the user to select an organization before proceeding.**

The screenshot shows the 'Add jobs' interface. At the top, there's a navigation bar with 'Lovely Blinds' and various menu items. The main form is for 'Joe Smith - Joe's Company'. It has several sections: 'Contact Info' with fields for account type, mobile, phone, address, state/country, country, zipcode, last name, company name, address 2, source, email, and currency. A red box highlights the 'Organisation Name' dropdown menu. Below the contact info is the 'Job Info' section with a 'Contact Info' button. At the bottom, there's a 'Total' row with five columns, each showing '\$ 0.00'. On the right, there's a sidebar with tabs for 'Date', 'Appointment', and 'Task'. The 'Date' tab is active, showing 'Created date' (29-08-2024) and 'Order date' (MM-YY-DDDD). Below that is the 'Price details' section with 'Net Price', 'VAT' (ON), and 'Gross price', all showing '\$ 0.00'. At the bottom of the sidebar, there's an 'All activities' section with 'History', 'Notes', 'SMS', 'Email', and 'Production not' tabs, and a 'No data available' message.



If Single Tax is configured, the system will continue to follow the existing functionality currently active in the live environment.

If Dual Tax is configured, both taxes will be displayed at the line-item level, within the Job Price Details section, invoices and credit notes.

Each tax can be enabled or disabled either at the line-item level or at the job level. Pricing calculations will be performed based on the selected tax configuration.

**Lovely Blinds** | Dashboard | All Jobs | Tasks | Calendar | Production management | Purchase Orders | More | Vivek Rao

**Add jobs** | **Roller blinds info** | Production

Recipe Name: Standard Not Req.

Unit type: mm | Fabric: Somfy motorized

Width: 1100 | Color: Black

Drop: 1500 | Control type: Red

Quantity: 3 | Brackets: Face fix brackets

Supplier: Decora | Accessories: Bottom bar, screws

Location: Hall | Special instruction: Special instruction

Product type: Category z

Mount: Outside

Motor: Somfy motorized

**Dates**

Created date: 03-05-2024

Production date: 03-05-2024

**Price details**

Cost price:  OR \$ 782.17

Discount \$: 0.00

Net price: \$ 838.88

VAT:  ON 5.00% \$ 41.94

GST:  ON 7.00% \$ 58.72

Save Copy Cancel

**Lovely Blinds** | Dashboard | All Jobs | Tasks | Calendar | Production management | Purchase Orders | More | Vivek Rao

**Add jobs**

**Joe Smith - Joe's Company** | Job Status: Lead | Job Ref No: ON2314 Q1 | Order Status: Under production | Invoice No:

Add product Select report Contact Info Production Send PO

Product	Description	Qty	Net	VAT	GST	Gross price	Seq
Roller blinds	1100, 1500, Black Plastic Chain, Face	1	838.88	41.94	58.72	939.54	1

**Date** | Appointment | Task

Created date: 29-08-2024

Order date: MM-YY-DDDD

Show more

**Price details** | Invoice & payment | Check list

Cost price: \$ 782.17

VAT:  ON \$ 41.94

GST:  ON \$ 58.72

Delivery cost: \$ 0.00

Gross price: \$ 939.54

Credit limit: \$ 0.00

Over due: \$ 0.00

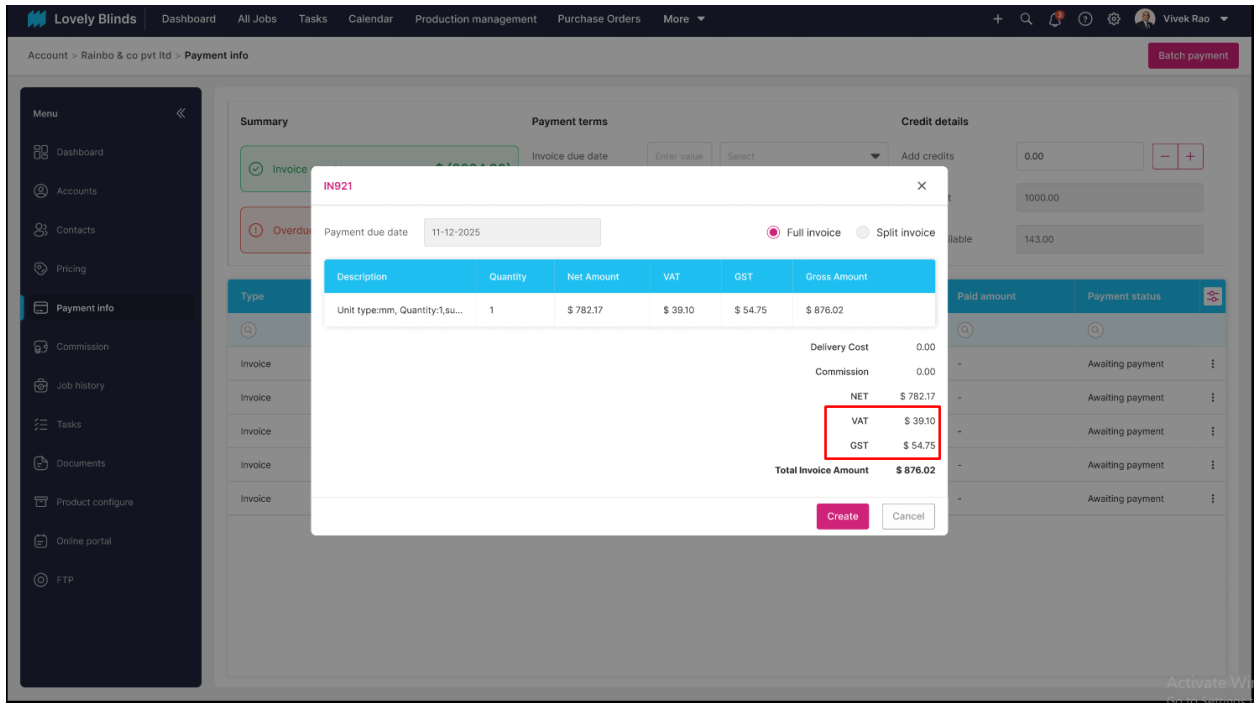
Total Paid: \$ 0.00

Outstanding Amount: \$ 0.00

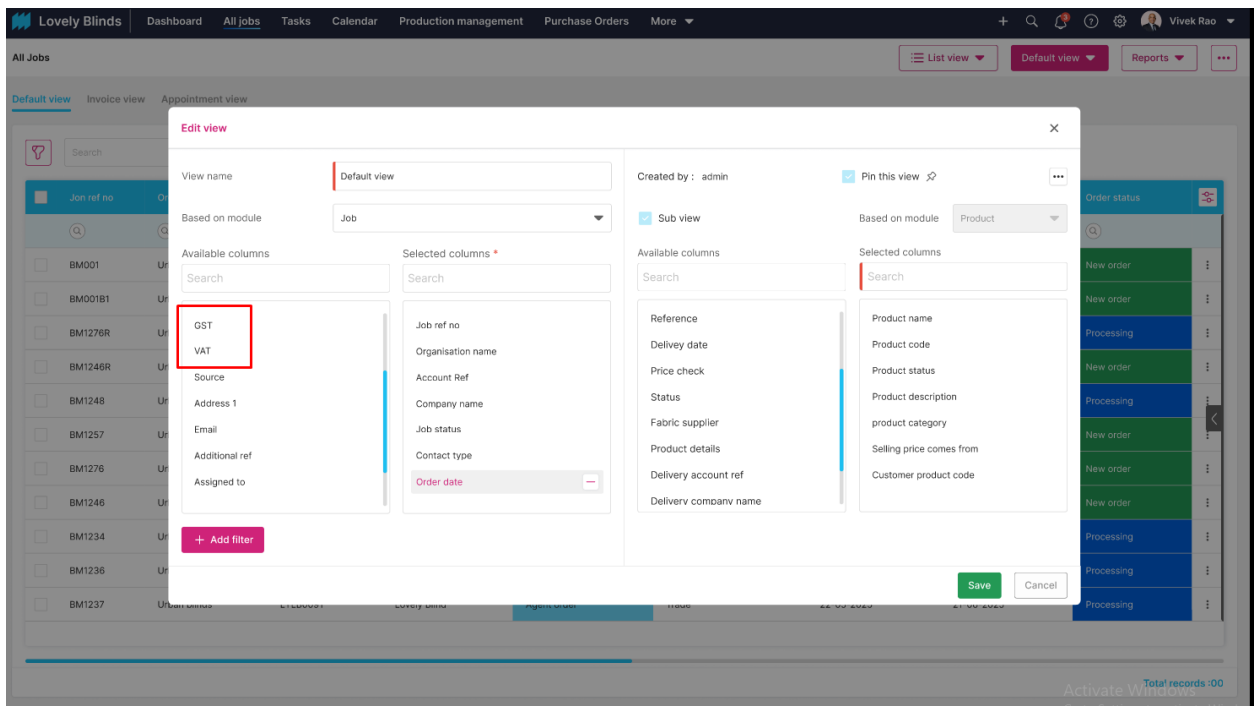
Show less

**Total** | 01.00 | \$782.17 | \$56.71 | \$838.88 | \$0.00

Save Cancel

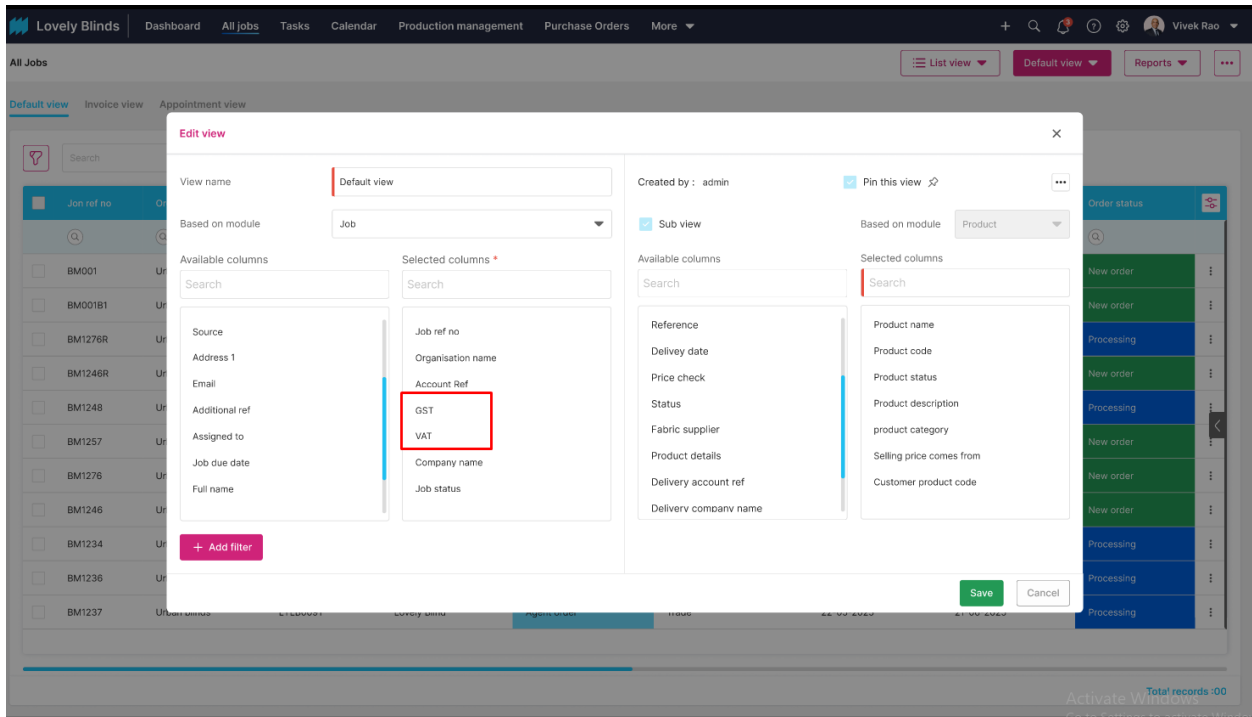


Within the all jobs view, the configured taxes should be available to be included in columns with their tax display names.

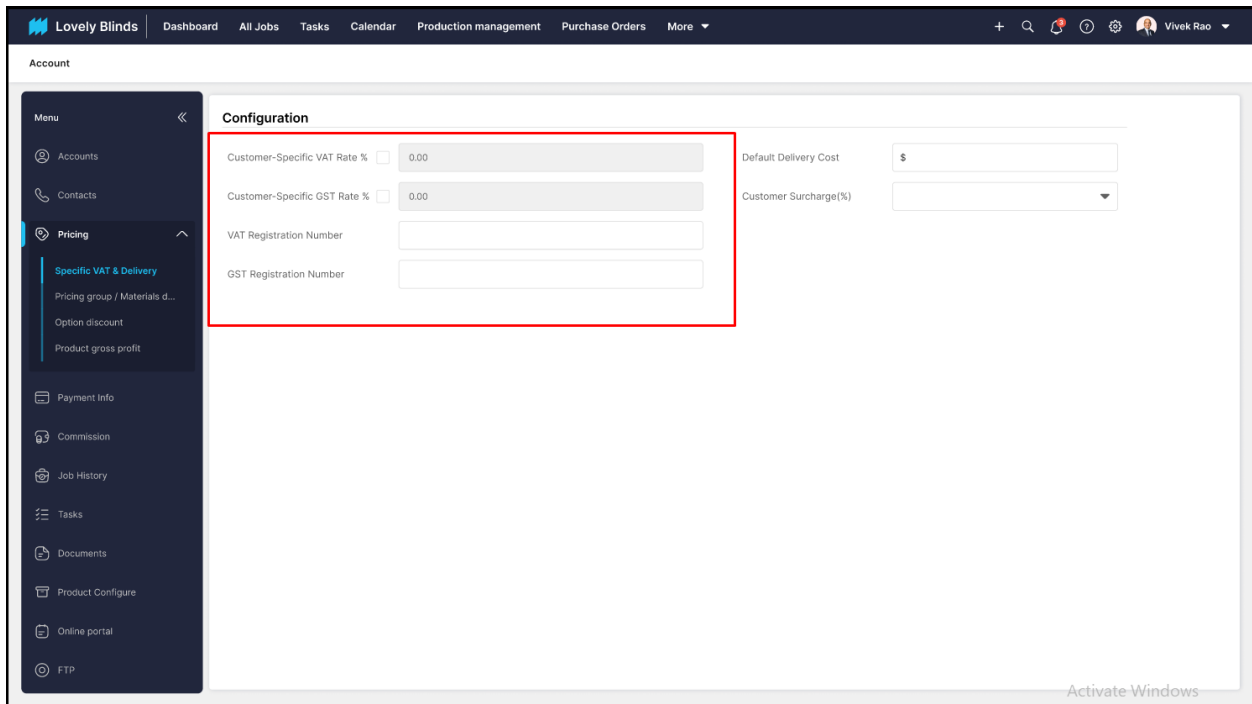


Within the All-Jobs view, the configured taxes must be available as selectable columns.

Each column should be displayed using its respective Tax Display Name, as defined in the tax configuration settings.



Customer specific tax can be configured for the both the taxes if dual tax is configured and two fields will appear to enter the registration numbers.



Lovely Blinds | Dashboard | All Jobs | Tasks | Calendar | Production management | Purchase orders | More

Settings

<b>Company settings</b> <ul style="list-style-type: none"><li>Application setup</li><li>Company profile</li><li>Financial information</li><li>Country</li><li>Currency conversion</li><li>Payment configuration</li><li>Language setup</li><li>Social media links</li><li>Terms &amp; Conditions</li></ul>	<b>System settings</b> <ul style="list-style-type: none"><li>User &amp; Roles</li><li>Invoice &amp; TAX</li><li>Price setup</li><li>Standard delivery</li><li>Express delivery</li><li>Service charge</li><li>Restore</li><li>Log history</li><li>Import history</li></ul>	<b>Calendar settings</b> <ul style="list-style-type: none"><li>Calendar setup</li><li>Appointment types</li><li>Checklist</li></ul>	<b>Status</b> <ul style="list-style-type: none"><li>Job status</li><li>Order status</li></ul>	<b>Product configuration</b> <ul style="list-style-type: none"><li>Field types</li><li>Options &amp; Materials</li><li>Pricing groups</li><li>Pricing types &amp; Unit types</li><li>Products</li><li>Suppliers</li></ul>	<b>Workroom setup</b> <ul style="list-style-type: none"><li>Product workflow</li><li>Stations &amp; Barcodes</li><li>Optimization setup</li><li>User allocation</li><li>Production storage configuration</li></ul>
<b>Communication</b> <ul style="list-style-type: none"><li>Email</li><li>Text message</li></ul>	<b>Report setup</b> <ul style="list-style-type: none"><li>Reports &amp; Templates</li></ul>	<b>Automation</b> <ul style="list-style-type: none"><li>Automation rules</li></ul>	<b>Customization forms</b> <ul style="list-style-type: none"><li>Modules</li><li>Field settings</li></ul>	<b>Online ordering setup</b> <ul style="list-style-type: none"><li><b>Online ordering settings</b></li><li>Trade user setup</li></ul>	<b>Version setup</b> <ul style="list-style-type: none"><li>Version setup</li></ul>
<b>Website setup</b> <ul style="list-style-type: none"><li>E-commerce products</li><li>SEO</li><li>Coupons</li></ul>					

Activate Windows

**Two taxes in online portal:**

Lovely Blinds | Dashboard | All Jobs | + | Vivek Rao

Edit job | Quincy mitchell | Customer ref | Add product | Product

**Roller blinds info**

Recipe Name: Standard Not Req.

Unit type: mm | Fabric: Somfy motorized

Width: 1000 | Color: Red

Drop: 1000 | Control type: Red

Quantity: 3 | Brackets: Face fix brackets

Supplier: Decora | Accessories: Bottom bar, screws

Location: Hall | Special instruction: Special instruction

Product type: Category z

Mount: Outside

Motor: Somfy motorized

**Trade price**

Net price: \$ 144.88

VAT  5.00%: \$ 7.24

GST  7.00%: \$ 10.14

Total gross price: \$ 162.26

**End customer price**

VAT  5.00%: \$ 7.24

GST  7.00%: \$ 10.14

Override price: 0.00

Total gross price: \$ 162.26

Total | Save | Copy | Cancel

Lovely Blinds | Dashboard | All Jobs | + | Vivek Rao

Edit job | Quincy mitchell - AM & Co | Job Ref No. | Account ref: ON2314

Customer ref | Additional ref | Billing address | Trade customer report | End customer report

Product	Description	Qty	Item price	Net price	VAT	GST	Gross price	Status
Roller blinds	1100, 1500, Black Plastic Ch...	1	143.65	144.88	7.24	10.14	164.88	Ready

Total | 01.00 | 143.65 | 144.88 | 20.00 | 164.88

**Trade price** | Dates

Delivery charge: \$ 20.00

Net price: \$ 144.88

VAT : \$ 7.24

**End customer price**

Delivery charge Inc.VAT: \$ 0.00

Fitting cost Inc.VAT: \$ 0.00

VAT : \$ 7.24

GST : \$ 10.14

Override: Override price: \$ 0.00

Emails | Delivery address | Notes

Default (same as billing address) | Account type: Dealer

Show more

Save | Submit | Save | Cancel

## Permission Changes:

Under company setting, Financial and Tax set up has been included. Invoice info has been given as a separate section under system settings.

Lovely Blinds | Dashboard | All Jobs | Tasks | Calendar | Production management | Purchase orders | More | + | 🔍 | 🏠 | ⚙️ | 👤 Vivek Rao

Settings > User & roles > Permission level

Search

Permission level name:  Description:  Default opening module:

**Company settings**

Company settings	<input checked="" type="checkbox"/>	Full access
Application setup	<input checked="" type="checkbox"/>	Full access
Company profile	<input checked="" type="checkbox"/>	Full access
<b>Financial &amp; Tax setup</b>	<input checked="" type="checkbox"/>	Full access
Country	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Full access
Currency conversion	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> View
Payment configuration	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Create
Language setup	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Edit
Social media links	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Delete
Terms & conditions	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Import
		<input checked="" type="checkbox"/> Export

**System settings**

Save Cancel

Lovely Blinds | Dashboard | All Jobs | Tasks | Calendar | Production management | Purchase orders | More | + | 🔍 | 🏠 | ⚙️ | 👤 Vivek Rao

Settings > User & roles > Permission level

Search

Permission level name:  Description:  Default opening module:

Social media links  Full access

Terms & conditions  Full access

**System settings**

System settings	<input checked="" type="checkbox"/>	Full access
User & Roles	<input checked="" type="checkbox"/>	Full access
<b>Invoice Info</b>	<input checked="" type="checkbox"/>	Full access
Price setup	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Full access
Standard delivery	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> View
Express	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Edit
Service charges	<input checked="" type="checkbox"/>	Full access
Restore	<input checked="" type="checkbox"/>	Full access
Log history	<input checked="" type="checkbox"/>	Full access

Save Cancel