
Phase 6: Accounting

Accounting> Products (Adding Products & Categories)



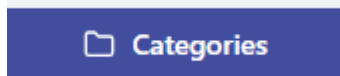
The **Products** dashboard is your centralized catalog for managing the items, equipment, and services your organization offers.

The dashboard is divided into two primary tabs to help you maintain a clean catalog:

- **Products Tab:** Displays individual items, their pricing, and specifications.



- **Categories Tab:** Allows you to manage the folders or groups used to classify your products (e.g., "Widgets" or "Pool Equipment").



- **Adding Categories:** Click the blue + Add Category button in the top-right corner to create a new grouping for your products.



Enter Category Details

- **Category Name:** Provide a clear, unique title for the group (e.g., "Pool Equipment" or "Interior Finishes").
Description: Enter a brief summary of what this category includes to help your team classify products correctly.
Parent Category: Use the dropdown to nest this category under an existing one, or leave it as "**No Parent (Top Level)**" if it is a primary group.
Display Order: Enter a numerical value to determine where this category appears in dropdown menus; categories with lower numbers are displayed first.
Published Toggle: Ensure this is enabled (blue) if you want the category to be immediately available for selection in projects and product entries.
Create Category: Click the blue button at the bottom right to save the new category to your dashboard.

Add Category
×

Create a new product category.

Category Name *

Enter category name

Description

Enter category description

Parent Category Leave empty for top-level category

No Parent (Top Level)

Display Order

0

☒
Published

Cancel
Create Category

Adding Products: Click the blue + Add Product button

+ Add Product

This form allows you to define the product's specifications, pricing, and inventory settings for use in project estimates and management.

×

Add Product

Create a new product in your catalog.

Image



Product Name *

Enter product name

SKU

Enter SKU

Category

No Category ▾

Unit Price

\$0.00

Cost

\$0.00

Unit of Measure

None ▾

Description

Quantity on Hand

0

Reorder Level - Alert when stock falls below this level

0

Published

Taxable

Product Kit

Recurring Billing

Enable

Billing Period

None ▾

Occurs Every _ Period(s)

1

Total Cycles

Indefinite

Cancel

Create Product

Explanation of Product fields

- **Image:** Click the image placeholder to upload a photo of the product.
 - **Product Name:** Enter the required, unique name for the item (e.g., "Pentair IntelliFlo Pump").
 - **SKU:** Assign a unique Stock Keeping Unit identifier for internal tracking.
 - **Category:** Select a pre-defined category from the dropdown menu to group this item with similar products.
 - **Unit Price:** Define the standard selling price for the item.
 - **Cost:** Enter the internal cost of the product to help calculate project profit margins.
 - **Unit of Measure:** Select the relevant unit (e.g., Each, Linear Foot, Square Foot) from the dropdown.
 - **Description:** Provide a detailed summary of the product's features or technical specifications.
 - **Quantity on Hand:** Enter the current number of units available in your inventory.
 - **Reorder Level:** Set a threshold to receive an automated alert when stock falls below a specific level.
 - **Status Toggles:**
 - **Published:** Enable this to make the product active and selectable for new projects.
 - **Taxable:** Toggle this on if the item is subject to sales tax.
 - **Product Kit:** Enable this if the item is a bundle of multiple individual products.
 - **Recurring Billing:** If the product represents a subscription or service, click **Enable** to configure the **Billing Period**, frequency, and **Total Cycles**.
 - **Create Product:** Click the blue button at the bottom right to save the new item.
-

Accounting> Tax Authorities



The **Tax Authorities** dashboard is a centralized workspace used to manage the various tax jurisdictions and associated rates that apply to your organization's projects.

Tax Authorities

Manage tax authorities and rates for your organization

[+ Add Tax Authority](#)

All ▼

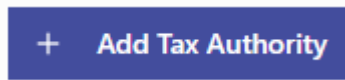
[Table](#)

[Cards](#)

Tax Authority ↑	Tax Rate	Status	Created	Actions
Owasso, OK	8.92%	✓ Active	13/02/2026	⋮
Skiatook, OK	10.25%	✓ Active	13/02/2026	⋮
Sperry, OK Default	8.47%	✓ Active	13/02/2026	⋮
Tulsa, OK	8.51%	✓ Active	06/02/2026	⋮

Adding a New Tax Authority

To add a new jurisdiction, click the blue + Add Tax Authority button in the top-right corner.



\$ Create Tax Authority

Tax Authority Name *

e.g., State Sales Tax, GST, VAT

Tax Rate (%) *

e.g., 8.25 %

Default Tax Authority

Use this as the default tax authority for new transactions

Active Status

Enable this tax authority for use in transactions

Tax Rate Information

Enter the tax rate as a percentage (e.g., 8.25 for 8.25%). This rate will be applied to taxable transactions.

Cancel

Create Tax Authority

Tax Authority Name: Enter the official name of the jurisdiction, such as a specific city or state sales tax.

Tax Rate (%): Input the applicable percentage as a numerical value (e.g., enter 8.25 for a rate of 8.25%). This rate will be applied to all taxable items associated with this authority.

Default Tax Authority: Toggle this switch to **Active** (blue) if you want this specific jurisdiction to be automatically applied to all new transactions that do not have another authority assigned.

Active Status: Ensure this toggle is enabled to make the authority available for use in live transactions. If disabled, the authority will be saved but hidden from selection menus.

Create Tax Authority: Click the blue button at the bottom right to save the new rate.

Accounting > Expense Categories



- **Expenses Tab:** Used to record and view individual cost entries, such as material purchases or labor costs.
- **Categories Tab (Active):** Used to manage the organizational folders that classify your costs (e.g., Job Expenses or Sub Invoice).

Expenses

Manage and track project expenses and categories

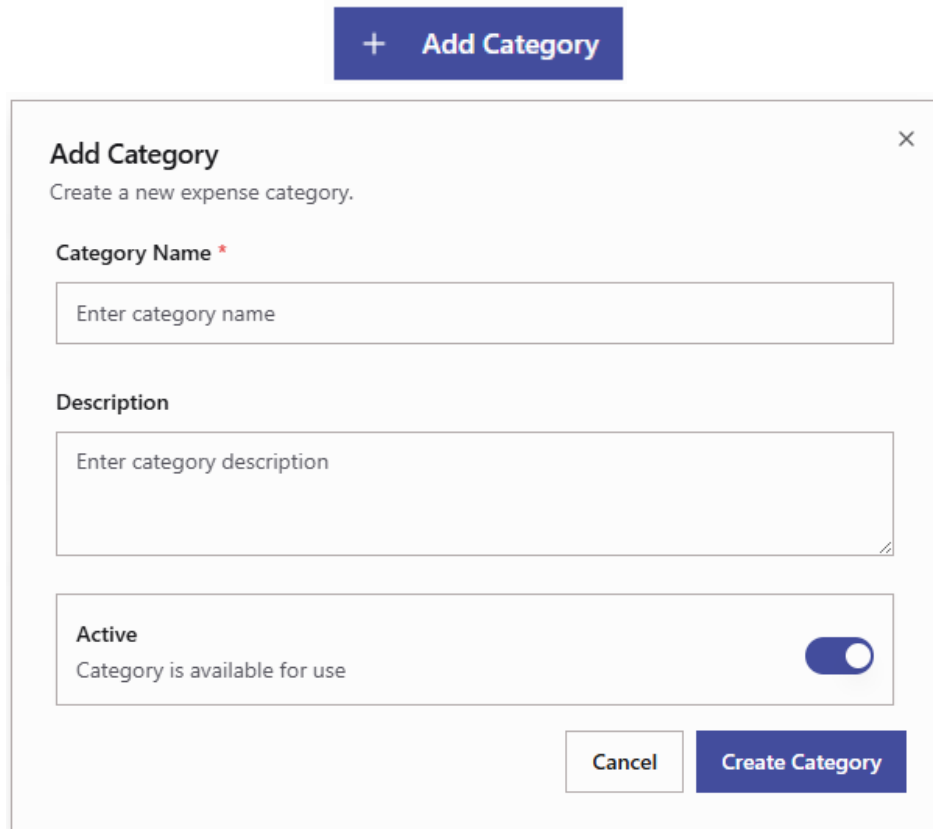
Expenses
Categories

+ Add Category

All Categories
Table
Cards

Category Name	Description	Status	Actions
Job Expenses	-	Active	⋮
Sub Invoice	-	Active	⋮

Add Category: Click the blue **+ Add Category** button in the top-right corner to create a new classification for your project costs.



+ Add Category

Add Category ×

Create a new expense category.

Category Name *

Enter category name

Description

Enter category description

Active

Category is available for use ☒

Cancel **Create Category**

To set up a new expense classification, provide the following information:

- **Category Name:** Enter a clear, unique title for the group, such as "Materials" or "Labor Costs". This field is required to create the record.
- **Description:** Use this area to provide a summary of what should be filed under this category to help your team maintain consistent record-keeping.
- **Active Toggle:** Ensure this is enabled (blue) to make the category immediately available for logging new project expenses.
- **Create Category:** Saves the new classification and adds it to your active Categories list in the Expenses dashboard.