

Create and manage a Home Company

PUQcloud Panel

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Overview

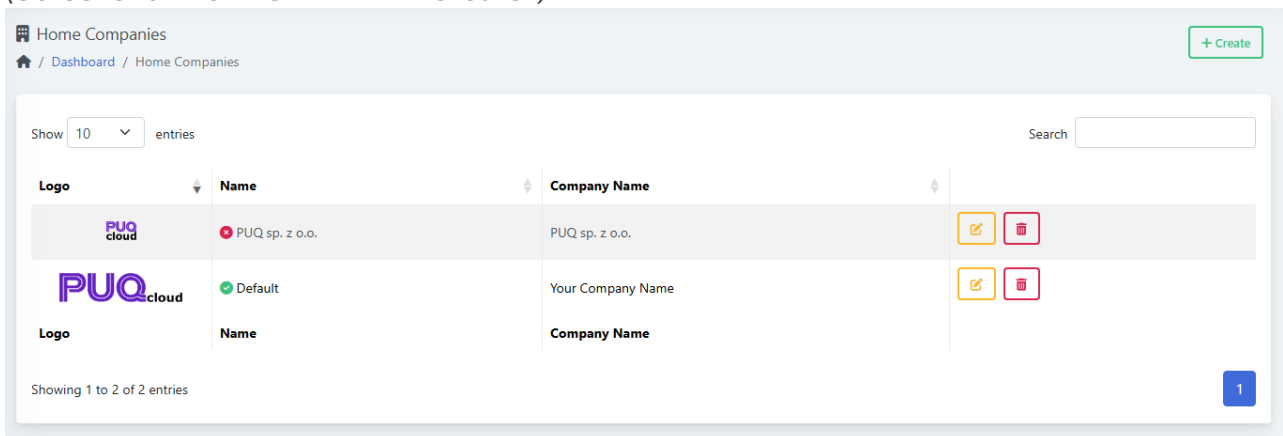
A **Home Company** is the legal entity that appears on your invoices, credit notes, emails, and payment pages (name, address, logo, tax IDs, etc.). You can keep one or many Home Companies and switch which one is **Default**.

Path: `Dashboard → Home Companies`

1) Create a Home Company

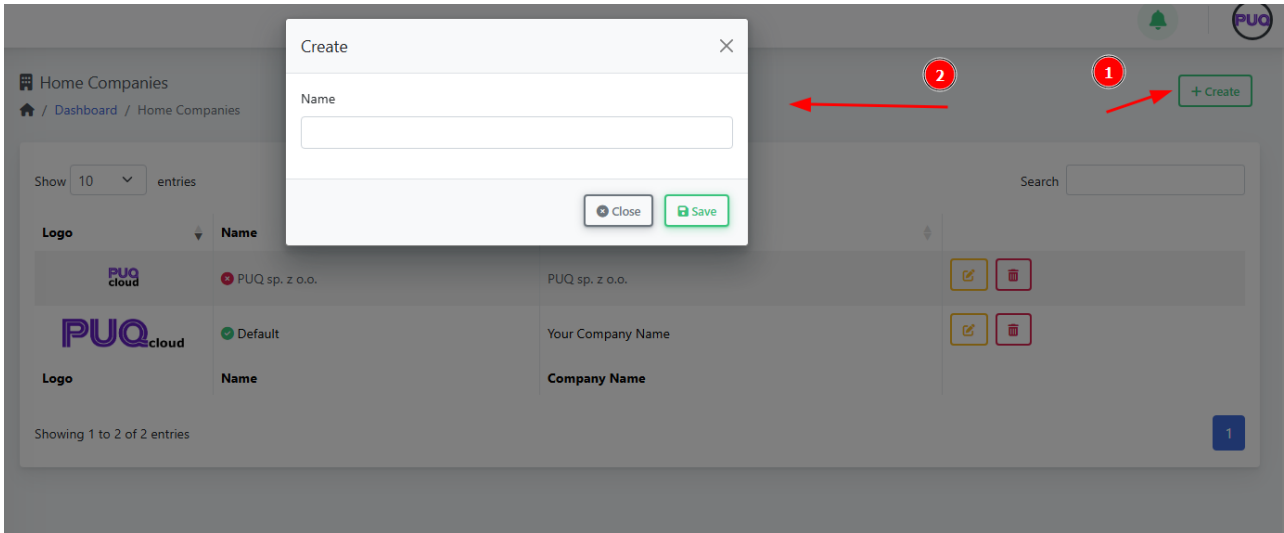
1. Go to **Menu → Finance → Home Companies**.

(Screenshot: list view with "+ Create")



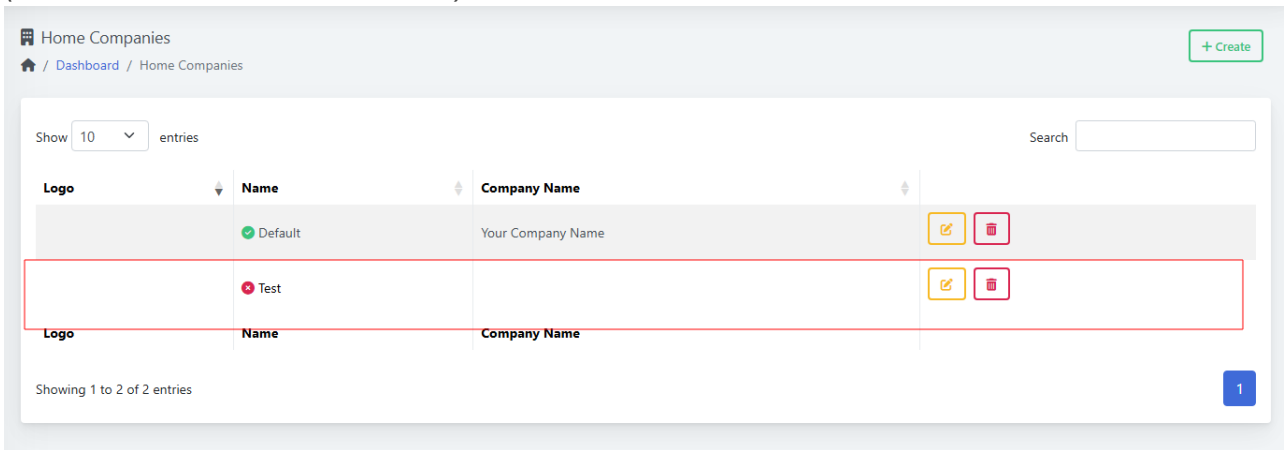
2. Click + **Create**.

(Screenshot: "Create" modal)



3. Enter **Name** (internal name, e.g., "PUQ sp. z o.o." or "North America").
4. Click **Save**.

(Screenshot: list shows new row)



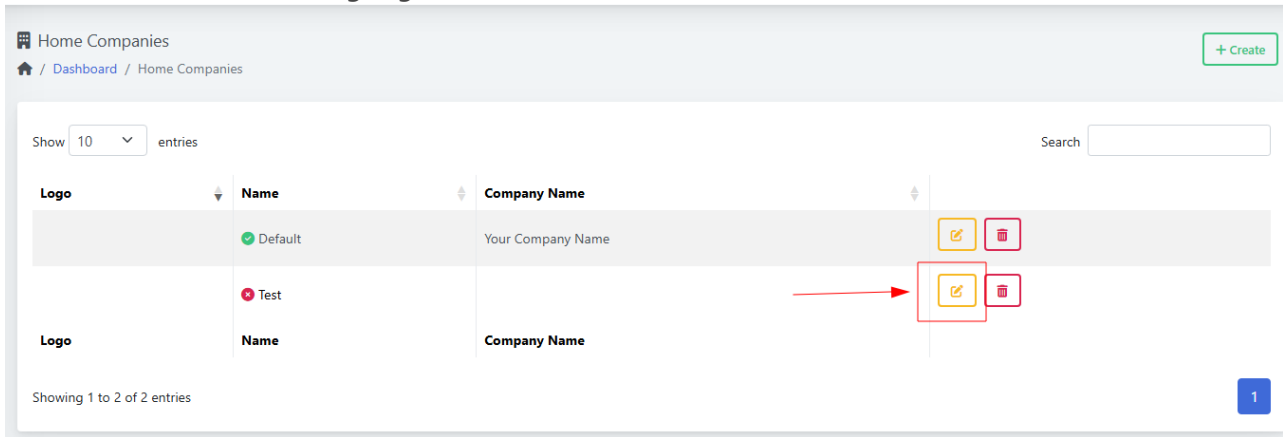
Tips

- The **green check** means "Default". The **red dot** means "not default".
- Use the **search** box to find companies quickly.

2) Edit a Home Company

1. In the list, click the **yellow edit** button on the row.

(Screenshot: edit icon highlighted)



2. You'll open the **Home Company** editor with tabs:

- **General**
- **Images**
- **Email Settings**
- **Tax Settings**
- **Invoice Settings**
- **Proforma Template**
- **Invoice Template**
- **Credit Note Template**
- **Payment Gateways**

3. After changes, click **Save** (top-right).

3) Fill out each tab

General

(Screenshot: General tab)

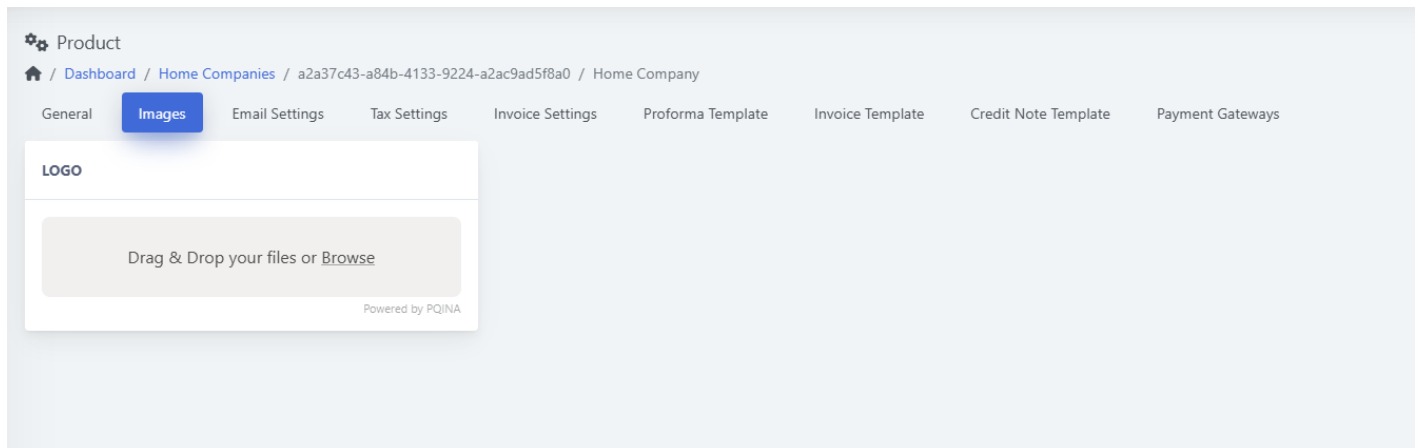
- **Name** — internal label (already set).
- **Company Name** — legal name shown on documents.
- **Address 1/2, Postcode, City, Country, State/Region** — printed on invoices/credit

notes.

- **Default: Yes/No** — set this company as the **Default** sender across billing.
- Click **Save**.

Images

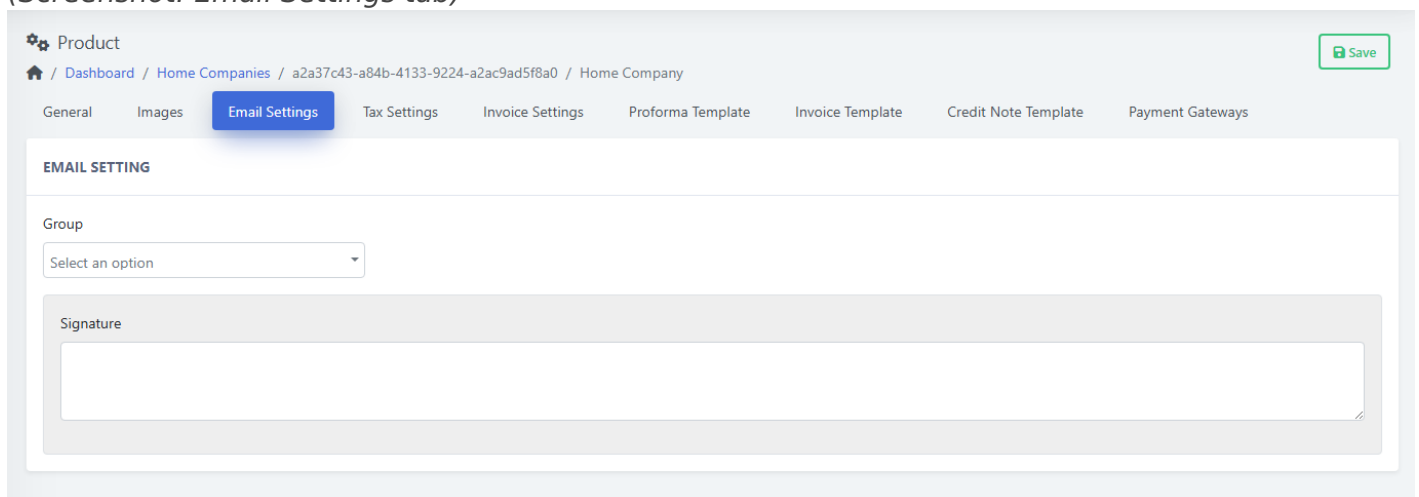
(Screenshot: *Images tab*)



- Upload your **Logo** (drag & drop or “Browse”).
- Use a transparent PNG for best results.
- Click **Save**.

Email Settings

(Screenshot: *Email Settings tab*)



- **Group** — choose the email group this company uses (for templates/routing).
- **Signature** — footer appended to outgoing emails (support info, legal note).
- Click **Save**.

Tax Settings

(Screenshot: *Tax Settings tab*)

Product / Dashboard / Home Companies / a2a37c43-a84b-4133-9224-a2ac9ad5f8a0 / Home Company Save

General Images Email Settings **Tax Settings** Invoice Settings Proforma Template Invoice Template Credit Note Template Payment Gateways

EUROPEAN TAX INFORMATION

Local Tax ID Name <input type="text"/>	EU VAT ID Name <input type="text"/>	Registration Number Name <input type="text"/>
Local Tax ID <input type="text"/>	EU VAT ID <input type="text"/>	Registration Number <input type="text"/>

COUNTRY-SPECIFIC TAX INFORMATION

<p>United States</p> <p>US EIN <input type="text"/></p> <p>US State Tax ID <input type="text"/></p> <p>US Entity Type <input type="text"/></p>	<p>Canada</p> <p>CA Business Number <input type="text"/></p> <p>CA GST/HST Number <input type="text"/></p> <p>CA PST/QST Number <input type="text"/></p> <p>CA Entity Type <input type="text"/></p>
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TAX RATES

<p>Tax 1 Name <input type="text"/></p> <p>Tax 1 Rate (%) <input type="text"/> %</p>	<p>Tax 2 Name <input type="text"/></p> <p>Tax 2 Rate (%) <input type="text"/> %</p>	<p>Tax 3 Name <input type="text"/></p> <p>Tax 3 Rate (%) <input type="text"/> %</p>
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European Tax Information

- **Local Tax ID Name / Local Tax ID** (e.g., NIP, VAT, etc.)
- **EU VAT ID Name / EU VAT ID**
- **Registration Number Name / Registration Number**

Country-Specific Tax Information

- **United States: US EIN, US State Tax ID, US Entity Type**
- **Canada: CA Business Number, CA GST/HST Number, CA PST/QST Number, CA Entity Type**

Tax Rates

- **Tax 1/2/3 Name and Rate (%)** — define up to three stacked taxes.
- Click **Save**.

Invoice Settings

(Screenshot: Invoice Settings tab)

Product

Dashboard / Home Companies / a2a37c43-a84b-4133-9224-a2ac9ad5f8a0 / Home Company

General Images Email Settings Tax Settings **Invoice Settings** Proforma Template Invoice Template Credit Note Template Payment Gateways

INVOICE SETTINGS

Proforma Settings

Proforma Number Format
[NUMBER]

Available Tags: [YEAR] [MONTH] [DAY] [NUMBER]

Next Proforma Number: 1 Proforma Number Reset: Never

Invoice Settings

Invoice Number Format
[NUMBER]

Available Tags: [YEAR] [MONTH] [DAY] [NUMBER]

Next Invoice Number: 1 Invoice Number Reset: Never

Credit Note Settings

Credit Note Number Format
[NUMBER]

Available Tags: [YEAR] [MONTH] [DAY] [NUMBER]

Next Credit Note Number: 1 Credit Note Number Reset: Never

Balance Credit Purchase Item Name
Purchase of Cloud Services

Available Tags: [YEAR] [MONTH] [DAY]

Balance Credit Purchase Item Description
e.g., Prepayment for future usage of cloud services

Available Tags: [YEAR] [MONTH] [DAY]

Refund Item Name
Refund of Unused Cloud Services

Available Tags: [YEAR] [MONTH] [DAY] [INVOICE_NUMBER]

Refund Item Description
e.g., Refund of remaining account balance

Available Tags: [YEAR] [MONTH] [DAY] [INVOICE_NUMBER]

INVOICE CUSTOMIZATION SETTINGS

PDF Font: DejaVu Sans Paper Size: A4 (210 × 297 mm)

Pay To Text:

Invoice Footer Text:

Numbering

- **Proforma / Invoice / Credit Note Number Format** — use tokens such as `{YEAR}`, `{MONTH}`, `{DAY}`, `{NUMBER}`.
- **Next ... Number** — starting counter (e.g., `1`).
- **... Number Reset** — how often to reset numbering (e.g., **Never**, yearly).

Item Texts

- **Balance Credit Purchase Item Name/Description** — wording shown when adding balance.
- **Refund Item Name/Description** — wording shown on credit/refunds.

Customization

- **PDF Font** (e.g., DejaVu Sans for multilingual).
- **Paper Size** (**A4** or **Letter**).
- **Pay To Text** — payment instructions.
- **Invoice Footer Text** — legal notes, company disclaimer.
- Click **Save**.

Proforma Template

Product

Dashboard / Home Companies / a2a37c43-a84b-4133-9224-a2ac9ad5f8a0 / Home Company

General Images Email Settings Tax Settings Invoice Settings **Proforma Template** Invoice Template Credit Note Template Payment Gateways

Combined Mode Code Mode A4 Preview Letter Preview

Template

```

1 @php
2 $items = $invoice->invoiceItems;
3 $home_company = $invoice->homeCompany;
4 $currency = $invoice->client->currency;
5 @endphp
6
7 <div style="font-family: 'Segoe UI', Tahoma, sans-serif; background: #fff; max-width:
8 800px; margin: auto; color: #444;">
9
10 <!-- LOGO -->
11 <div style="text-align: right; margin-bottom: 20px;">
12 
14 </div>
15 <!-- HEADER -->
16 <div style="display: flex; justify-content: space-between; align-items: center; border-
17 bottom: 2px solid #6420c1; padding-bottom: 10px; margin-bottom: 20px;">
18 <h2 style="margin: 0; color: #6420c1;">Pro Forma Invoice</h2>
19
20 @php
21 $statusStyles = [
22 'invoiced' => 'background-color: #0d6efd; color: #ffffff;',
23 'refunded' => 'background-color: #ffc107; color: #212529;',
24 'paid' => 'background-color: #d4edda; color: #256029;',
25 'unpaid' => 'background-color: #f8d7da; color: #842029;',
26 'canceled' => 'background-color: #e9ecef; color: #343a40;',
27 ];
28 @endphp

```

HTML Preview

@php \$items = \$invoice->invoiceItems; \$home_company = \$invoice->homeCompany; \$currency = \$invoice->client->currency; @endphp

Pro Forma Invoice

@php \$statusStyles = ['invoiced' => 'background-color: #0d6efd; color: #ffffff;', 'refunded' => 'background-color: #ffc107; color: #212529;', 'paid' => 'background-color: #d4edda; color: #256029;', 'unpaid' => 'background-color: #f8d7da; color: #842029;', 'canceled' => 'background-color: #e9ecef; color: #343a40;',]; @endphp

Number: {{ \$invoice->number }}

Issue Date: {{ \$invoice->issue_date->format("Y-m-d") }}

@if (\$invoice->status !== 'canceled')

Due Date: {{ \$invoice->due_date->format("Y-m-d") }}

@endif @if (\$invoice->status === 'canceled')

Cancel Date: {{ \$invoice->canceled_date->format("Y-m-d") }}

@endif

Seller	Buyer
{{ \$invoice->home_company_company_name }} @if (empty(\$invoice->home_company_address_1)) {{ \$invoice->home_company_address_1 }} @endif @if (empty(\$invoice->home_company_address_2)) {{ \$invoice->home_company_address_2 }} @endif @if (empty(\$invoice->home_company_postcode)) {{ \$invoice-	{{ \$invoice->client_company_name ? \$invoice->client_firstname . ' ' . \$invoice->client_lastname }} @if (empty(\$invoice->client_address_1)) {{ \$invoice->client_address_1 }} @endif @if (empty(\$invoice->client_address_2)) {{ \$invoice->client_address_2 }} @endif @if (empty(\$invoice->client_address_2)) {{ \$invoice->client_address_2 }}

- Works like the Invoice/Credit Note Template editors below.
- Edit the HTML/Blade content; preview and **Save**.

Invoice Template

(Screenshot: Invoice Template editor with live preview)

Product

Dashboard / Home Companies / a2a37c43-a84b-4133-9224-a2ac9ad5f8a0 / Home Company

General Images Email Settings Tax Settings Invoice Settings Proforma Template **Invoice Template** Credit Note Template Payment Gateways

Combined Mode Code Mode A4 Preview Letter Preview

Template

```

1 @php
2 $items = $invoice->invoiceItems;
3 $home_company = $invoice->homeCompany;
4 $currency = $invoice->client->currency;
5 @endphp
6
7 <div style="font-family: 'Segoe UI', Tahoma, sans-serif; background: #fff;
8 max-width: 800px; margin: auto; color: #444;">
9
10 <!-- LOGO -->
11 <div style="text-align: right; margin-bottom: 20px;">
12 
14 </div>
15 <!-- HEADER -->
16 <div style="display: flex; justify-content: space-between; align-items:
17 center; border-bottom: 2px solid #6420c1; padding-bottom: 10px; margin-
18 bottom: 20px;">
19 <h2 style="margin: 0; color: #6420c1;">Tax Invoice</h2>
20
21 @php
22 $statusStyles = [
23 'invoiced' => 'background-color: #0d6efd; color: #ffffff;',
24 'refunded' => 'background-color: #ffc107; color: #212529;',
25 'paid' => 'background-color: #d4edda; color: #256029;',
26 'unpaid' => 'background-color: #f8d7da; color: #842029;',
27 'canceled' => 'background-color: #e9ecef; color: #343a40;',
28 ];
29 @endphp

```

HTML Preview

@php \$items = \$invoice->invoiceItems; \$home_company = \$invoice->homeCompany; \$currency = \$invoice->client->currency; @endphp

Tax Invoice

@php \$statusStyles = ['invoiced' => 'background-color: #0d6efd; color: #ffffff;', 'refunded' => 'background-color: #ffc107; color: #212529;', 'paid' => 'background-color: #d4edda; color: #256029;', 'unpaid' => 'background-color: #f8d7da; color: #842029;', 'canceled' => 'background-color: #e9ecef; color: #343a40;',]; @endphp

Number: {{ \$invoice->number }}

Issue Date: {{ \$invoice->issue_date->format("Y-m-d") }}

Due Date: {{ \$invoice->due_date->format("Y-m-d") }}

Seller	Buyer
{{ \$invoice->home_company_company_name }} {{ \$invoice->home_company_address_1 }} @if (\$invoice->home_company_address_2) {{ \$invoice->home_company_address_2 }} @endif @if (\$invoice->home_company_city) {{ \$invoice->home_company_city }} @endif @if (\$invoice->home_company_state) {{ \$invoice->home_company_state }} @endif {{ \$invoice->home_company_postcode }}	{{ \$invoice->client_company_name ? \$invoice->client_firstname . ' ' . \$invoice->client_lastname }} {{ \$invoice->client_address_1 }} @if (\$invoice->client_address_2) {{ \$invoice->client_address_2 }} @endif @if (\$invoice->client_city) {{ \$invoice->client_city }} @endif @if (\$invoice->client_state) {{ \$invoice-

- Modes: **Combined, Code Mode**; Previews: **A4 / Letter**.
- Left pane: template code (Blade + HTML/CSS).
- Right pane: **HTML Preview**.
- Variables available (examples):
 - `|\$invoice|`, `|\$invoice->invoiceItems|`, `|\$invoice->client|`, `|\$invoice->homeCompany|`, etc.
- Keep your styles simple for nice PDFs. **Save** after edits.

Credit Note Template

(Screenshot: Credit Note Template editor with live preview)

The screenshot shows the editor interface for a Credit Note Template. The top navigation bar includes 'Product', 'Dashboard', 'Home Companies', and 'Home Company'. Below this are tabs for 'General', 'Images', 'Email Settings', 'Tax Settings', 'Invoice Settings', 'Proforma Template', 'Invoice Template', 'Credit Note Template', and 'Payment Gateways'. The 'Credit Note Template' tab is active, showing a 'Combined Mode' button and buttons for 'Code Mode', 'A4 Preview', and 'Letter Preview'. The left pane displays the template code, and the right pane shows the HTML preview.

Template Code:

```

1 @php
2 $items = $invoice->invoiceItems;
3 $home_company = $invoice->homeCompany;
4 $currency = $invoice->client->currency;
5 @endphp
6
7 <div style="font-family: 'Segoe UI', Tahoma, sans-serif; background: #fff;
8 max-width: 800px; margin: auto; color: #444;">
9
10 <!-- LOGO -->
11 <div style="text-align: right; margin-bottom: 20px;">
12 
14 </div>
15 <!-- HEADER -->
16 <div style="display: flex; justify-content: space-between; align-items:
17 center; border-bottom: 2px solid #6420c1; padding-bottom: 10px; margin-
18 bottom: 20px;">
19 <h2 style="margin: 0; color: #6420c1;">Credit Note</h2>
20
21 @php
22 $statusStyles = [
23 'invoiced' => 'background-color: #0d6efd; color: #ffffff;',
24 'refunded' => 'background-color: #ffc107; color: #212529;',
25 'paid' => 'background-color: #d4edda; color: #256029;',
26 'unpaid' => 'background-color: #f8d7da; color: #842029;',
27 'canceled' => 'background-color: #e9ecef; color: #343a40;',

```

HTML Preview:

```

@php $items = $invoice->invoiceItems; $home_company = $invoice->homeCompany;
$currency = $invoice->client->currency; @endphp

@php $statusStyles = [ 'invoiced' => 'background-color:
#0d6efd; color: #ffffff;', 'refunded' => 'background-color:
#ffc107; color: #212529;', 'paid' => 'background-color:
#d4edda; color: #256029;', 'unpaid' => 'background-color:
#f8d7da; color: #842029;', 'canceled' => 'background-
color: #e9ecef; color: #343a40;']; @endphp

Credit Note

Number: {{ $invoice->number }}
Issue Date: {{ $invoice->issue_date->format("Y-m-d") }}
Refunded Date: {{ $invoice->refunded_date->format("Y-m-d") }}
@if ($invoice->related_invoice_number)
Related Invoice: {{ $invoice->related_invoice_number }}
@endif

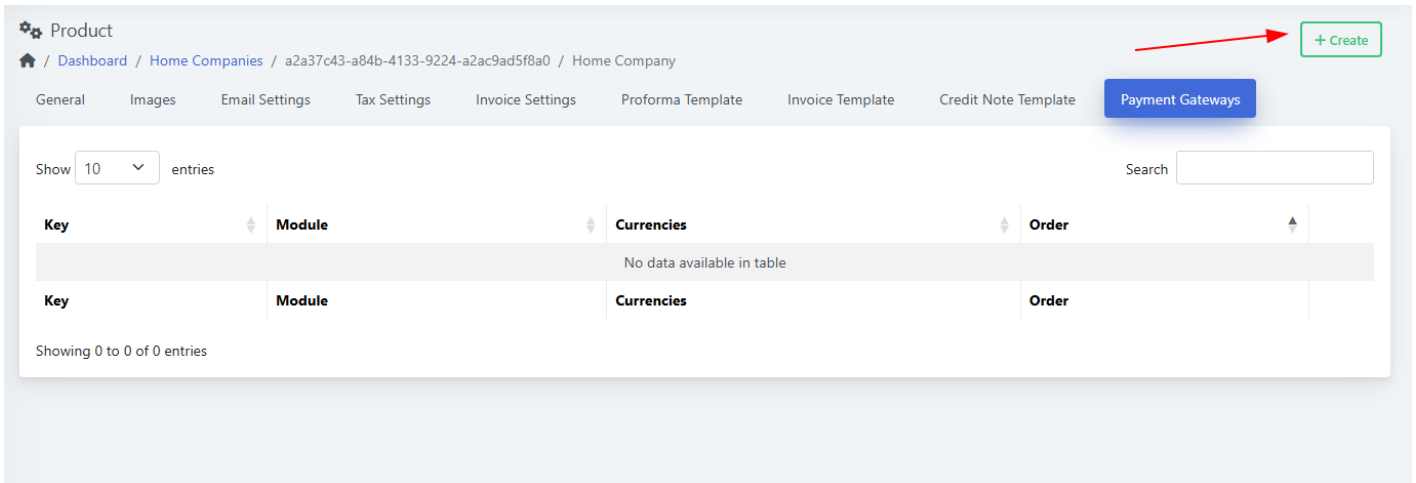
```

The preview shows a 'Credit Note' header with a table for Seller and Buyer information. The Seller information is partially visible, showing fields for company name and address.

- Same tools as Invoice Template; shows “Credit Note” preview.
- **Save** after edits.

Payment Gateways

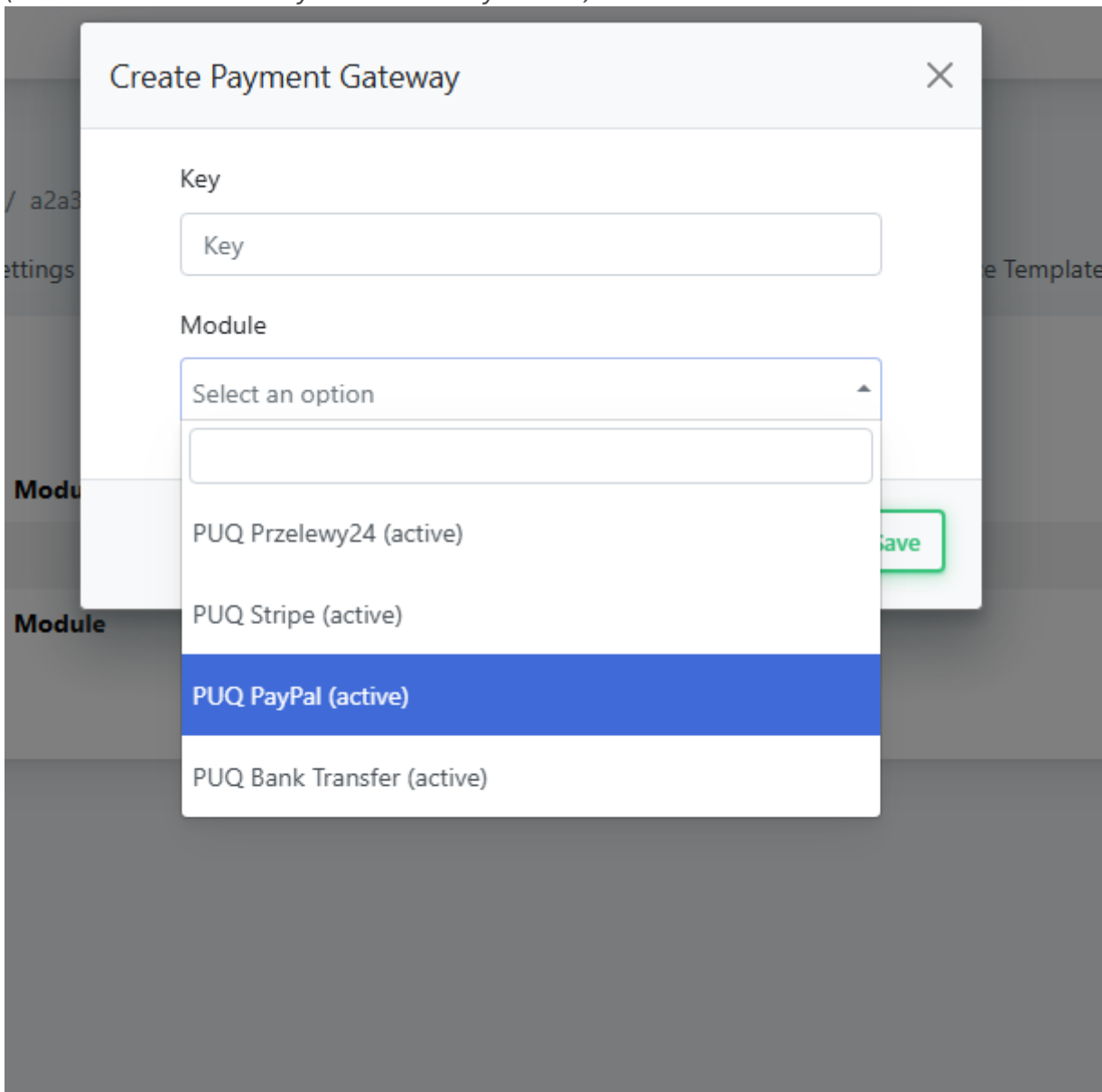
(Screenshot: Payment Gateways tab — empty table with + **Create**)



Add a Gateway

1. Click **+ Create**.

(Screenshot: Create Payment Gateway modal)



2. Fill **Key** (internal ID, e.g., `|stripe_main|`).

3. Pick **Module**:

- **PUQ Przelewy24 (active)**
- **PUQ Stripe (active)**
- **PUQ PayPal (active)**
- **PUQ Bank Transfer (active)**

4. Click **Save**.

Configure the Gateway




(Screenshot: Payment Gateway detail form)

Key: Currencies:

ICON IMAGE

Drag & Drop your files or [Browse](#)

Powered by PQINA

 English	 Ukrainian	 Polish
Name: <input type="text" value="Name"/>	Description: <input type="text" value="Description"/>	

WEB Hook URL:

Publishable Secret Key:

Secret Key:

WEB Hook Secret:

Sandbox Mode

Sandbox Publishable Secret Key:

Sandbox Secret Key:

Sandbox WEB Hook Secret:

- **Key** — internal ID.
 - **Currencies** — choose supported currencies.
 - **Icon Image** — optional logo for checkout.
 - Multilingual **Name** and **Description** (English / Ukrainian / Polish).
 - Module fields (example: **Stripe**):
 - **WEB Hook URL** (paste into Stripe dashboard).
 - **Publishable Key, Secret Key, WEB Hook Secret.**
 - **Sandbox Mode** toggle + sandbox keys.
 - **Test Connection** — verify credentials.
 - Click **Save**.
-

4) Make a company Default (or change it)

1. Open the company → **General** tab.
2. Toggle **Default** to **Yes**.
3. **Save**.

The Default Home Company will be used on new billing documents unless a module or workflow specifies otherwise.

5) Manage the list

- **Edit** (yellow pencil) — change details.
 - **Delete** (red trash) — remove a company you no longer need.
 - Tip: do not delete a company that still appears on historical invoices.
 - **Search** — filter by name.
-

Best Practices

- **Numbering:** include `{YEAR}` in formats to avoid duplicates across years (e.g., `INV-{YEAR}-{NUMBER}`).
- **Logos:** upload a high-resolution PNG with transparent background.
- **Taxes:** set the correct country section (US or CA) and fill local VAT/GST fields to keep invoices compliant.
- **Backups:** before editing templates, export or copy the current code.

Troubleshooting

- **Gateway test fails:** recheck the keys, ensure you used the **live** or **sandbox** pair to match the **Sandbox Mode** setting.
- **Wrong logo/text on documents:** verify you edited the correct **Home Company** and that it's set as **Default**.
- **Numbers jumping:** confirm the **Next ... Number** and the **Reset** policy; avoid changing formats mid-year.

Revision #7

Created 2 September 2025 13:09:26 by Yuliia Noha

Updated 28 October 2025 15:30:19 by Yuliia Noha