Image not found or type unknown

Create and manage a Home Company

PUQcloud Panel

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Overview

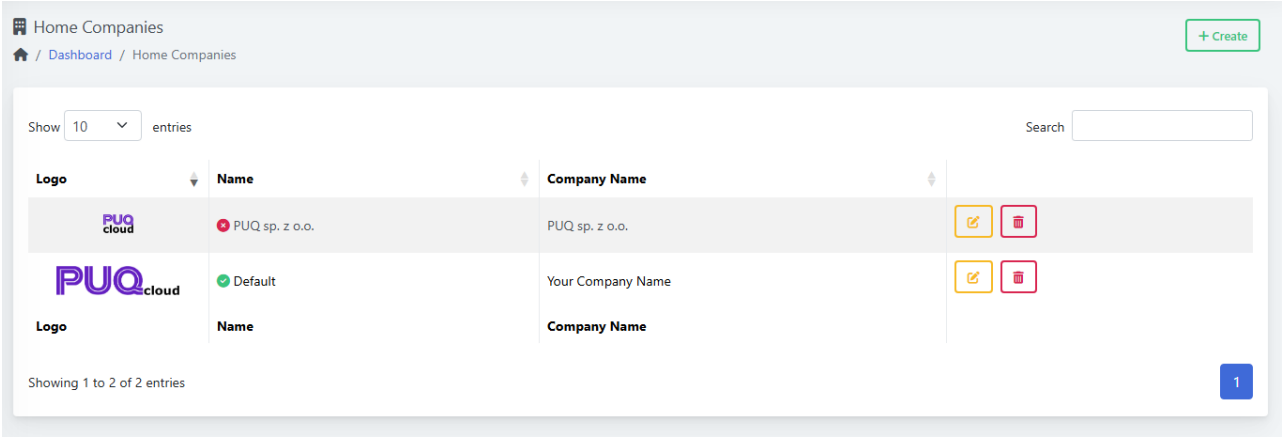
A **Home Company** is the legal entity that appears on your invoices, credit notes, emails, and payment pages (name, address, logo, tax IDs, etc.). You can keep one or many Home Companies and switch which one is **Default**.

Path: `Dashboard → Home Companies`

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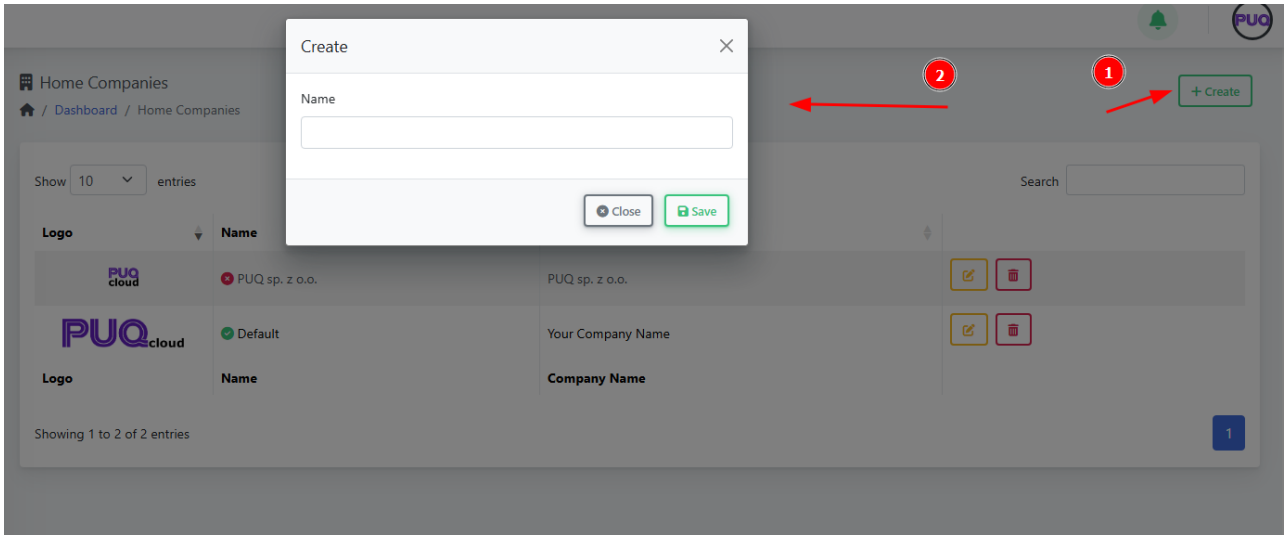
1) Create a Home Company

1. Go to **Menu → Finance → Home Companies**.
   (Screenshot: list view with "+ Create")

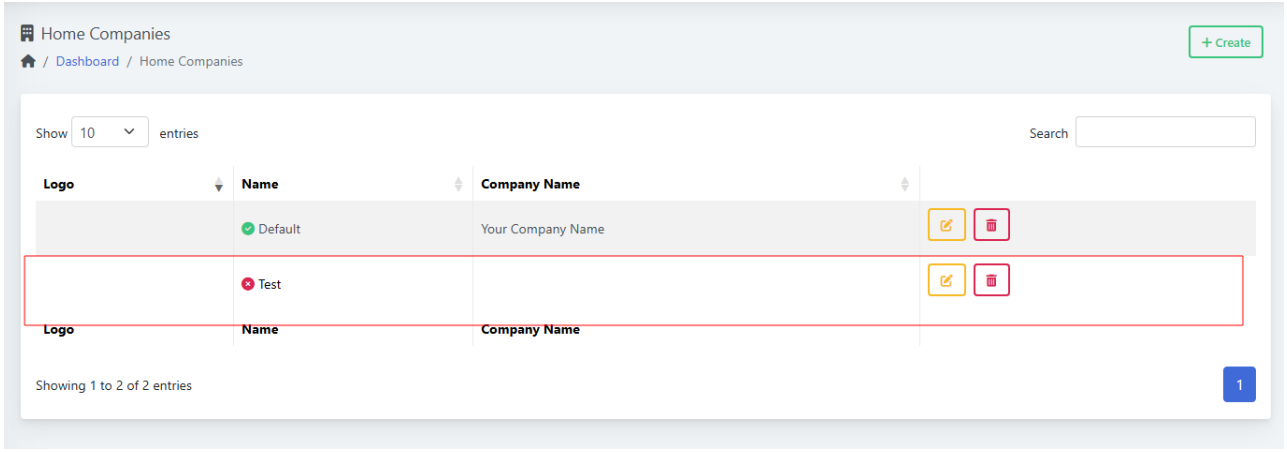


2. Click **+ Create**.

(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

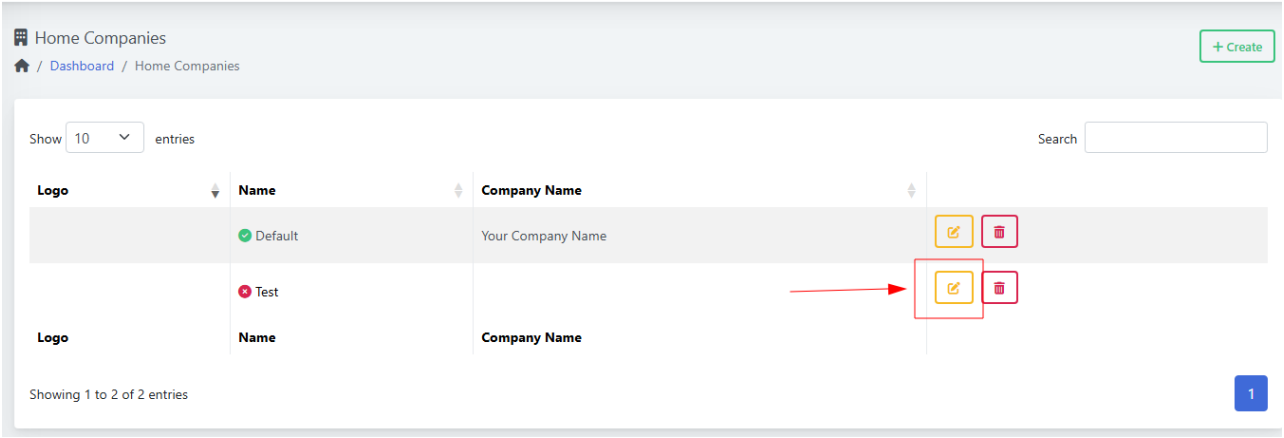
- The **green check** means “Default”. The **red dot** means “not default”.
- Use the **search** box to find companies quickly.

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2) Edit a Home Company

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

(Screenshot: edit icon highlighted)



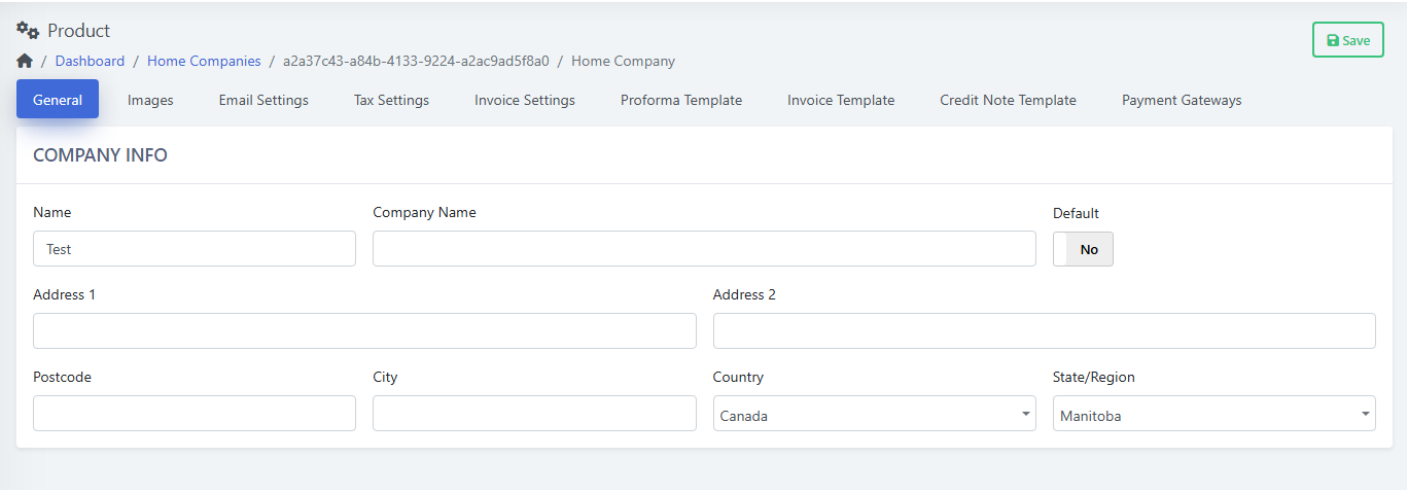
2. You'll open the **Home Company** editor with tabs:
   - **General**
   - **Images**
   - **Email Settings**
   - **Tax Settings**
   - **Invoice Settings**
   - **Proforma Template**
   - **Invoice Template**
   - **Credit Note Template**
   - **Payment Gateways**
3. After changes, click **Save** (top-right).

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3) Fill out each tab

General

(Screenshot: General tab)



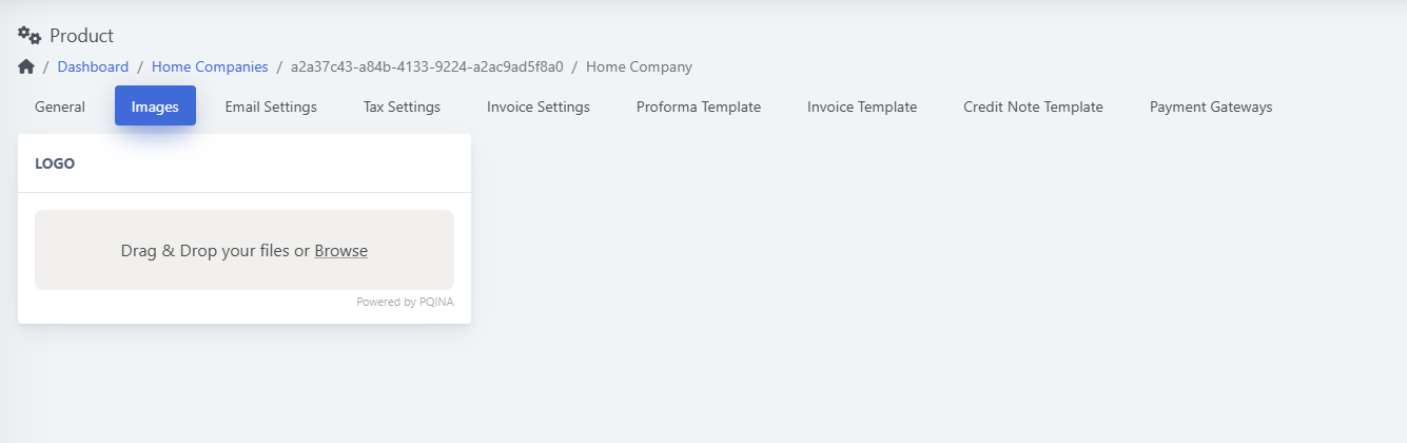
- **Name** — internal label (already set).
- **Company Name** — legal name shown on documents.
- **Address 1/2, Postcode, City, Country, State/Region** — printed on invoices/credit

notes.

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

Images

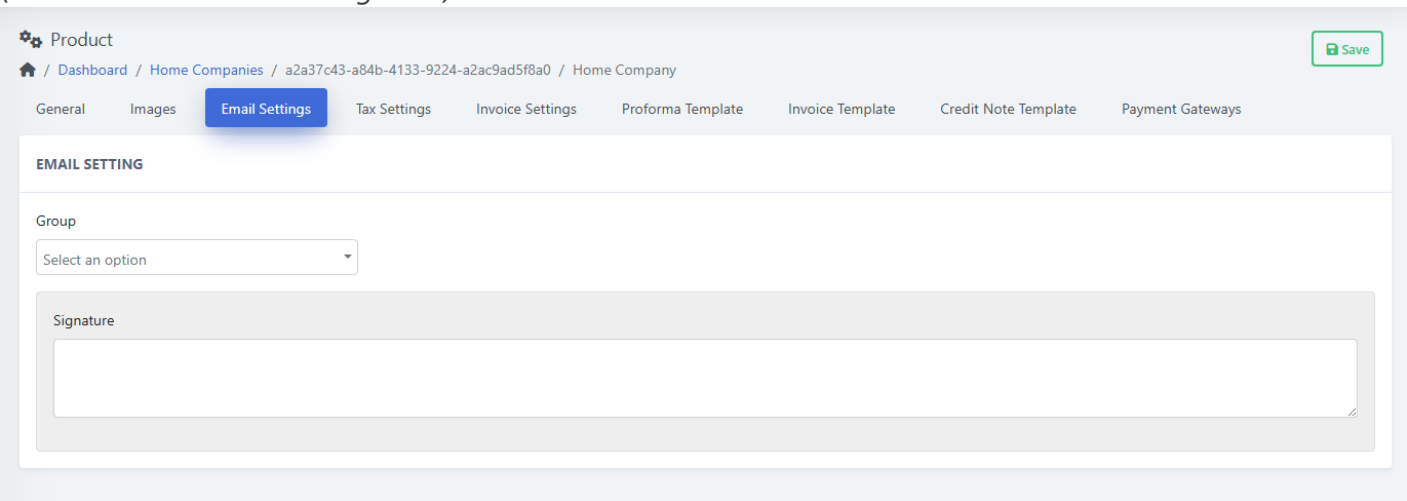
(Screenshot: Images tab)



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

Email Settings

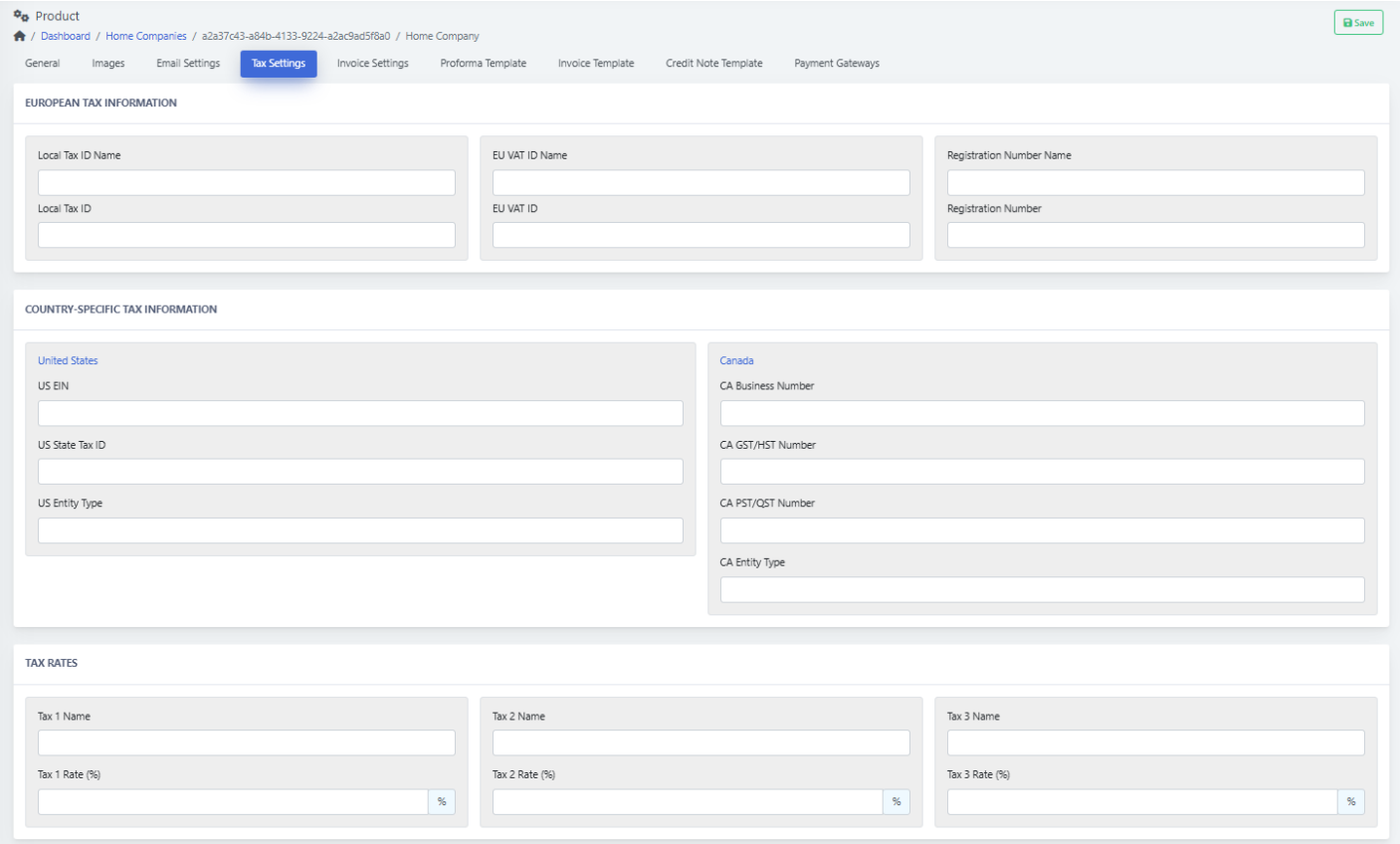
(Screenshot: Email Settings tab)



- **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)



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

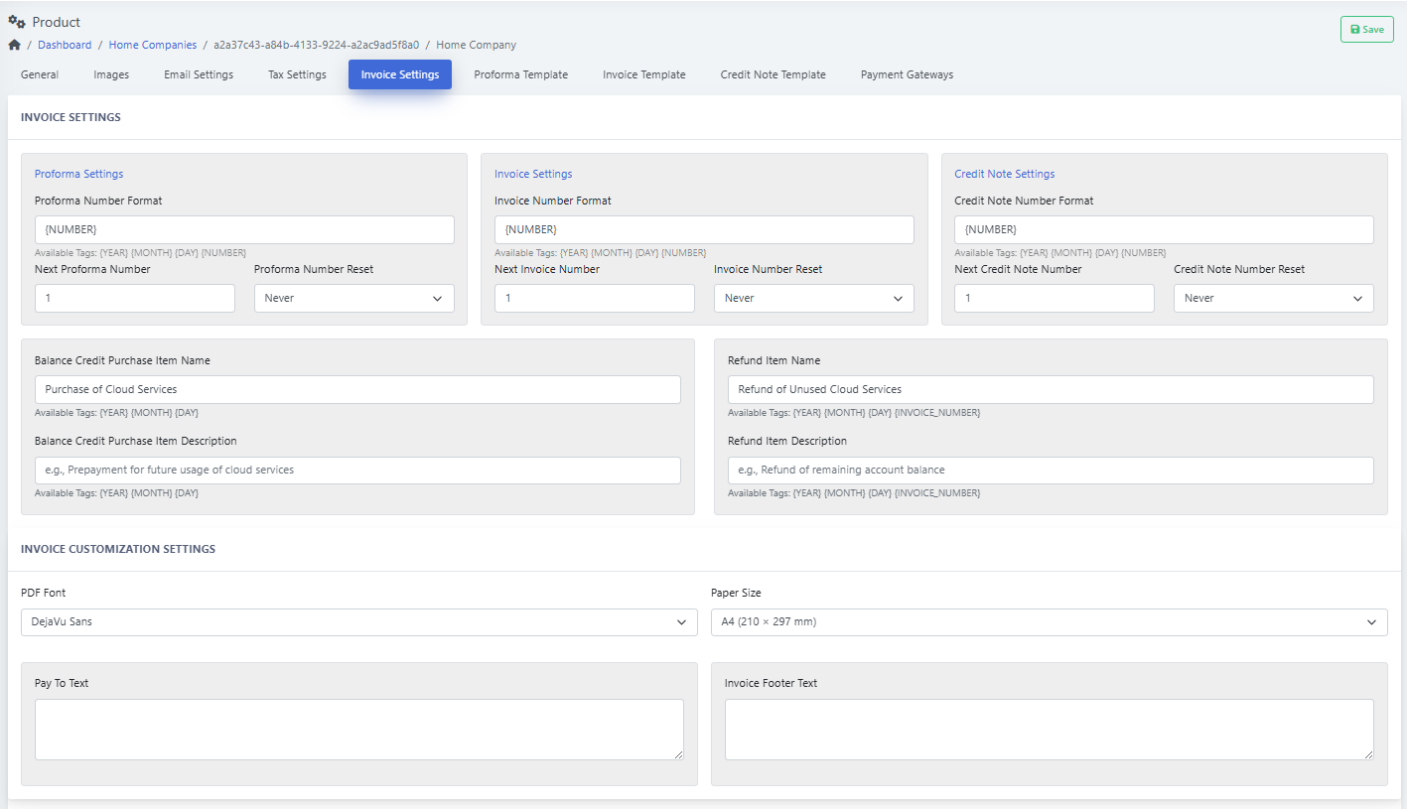
- **United States: US EIN**, **US State Tax ID**, **US Entity Type**
- **Canada: CA Business Number**, **CA GST/HST Number**, **CA PST/QST Number**, **CA Entity Type**

Tax Rates

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

Invoice Settings

(Screenshot: Invoice Settings tab)



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).

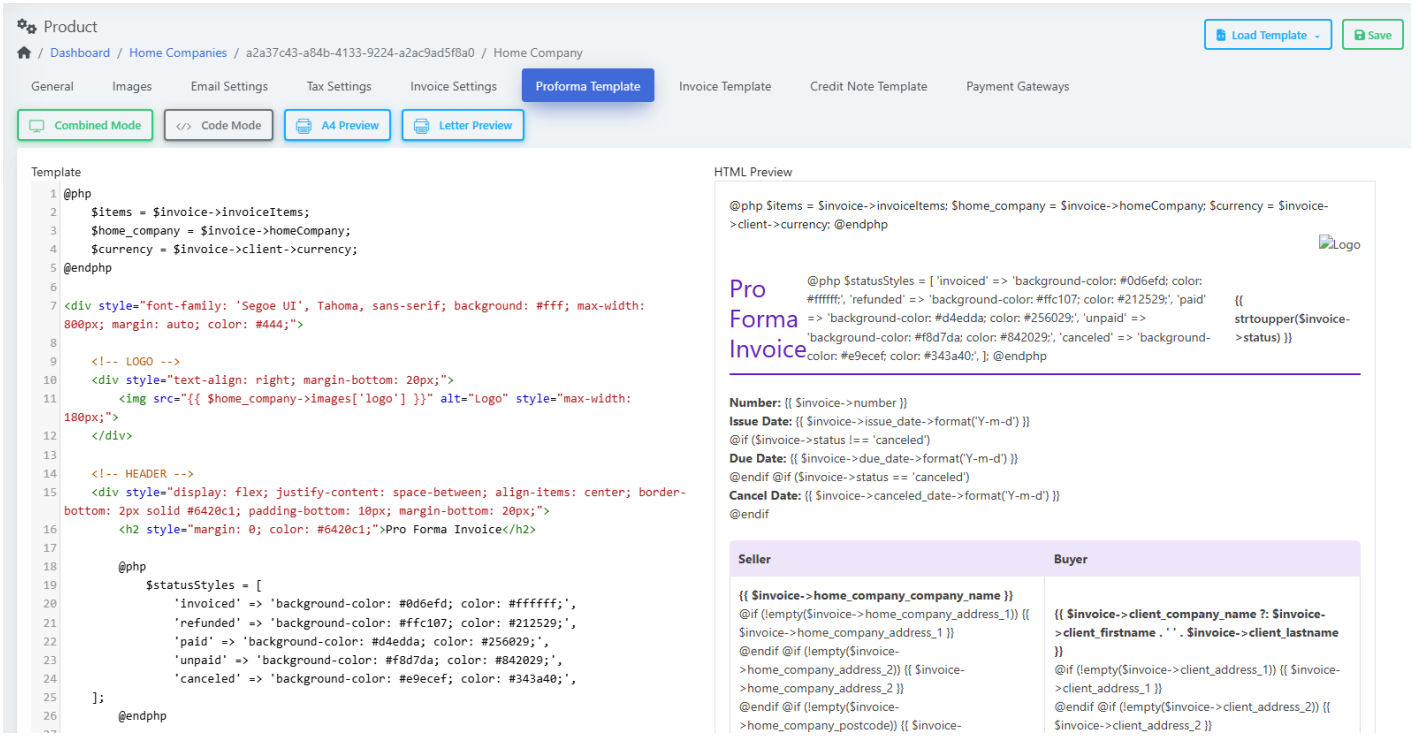
Item Texts

- **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**.

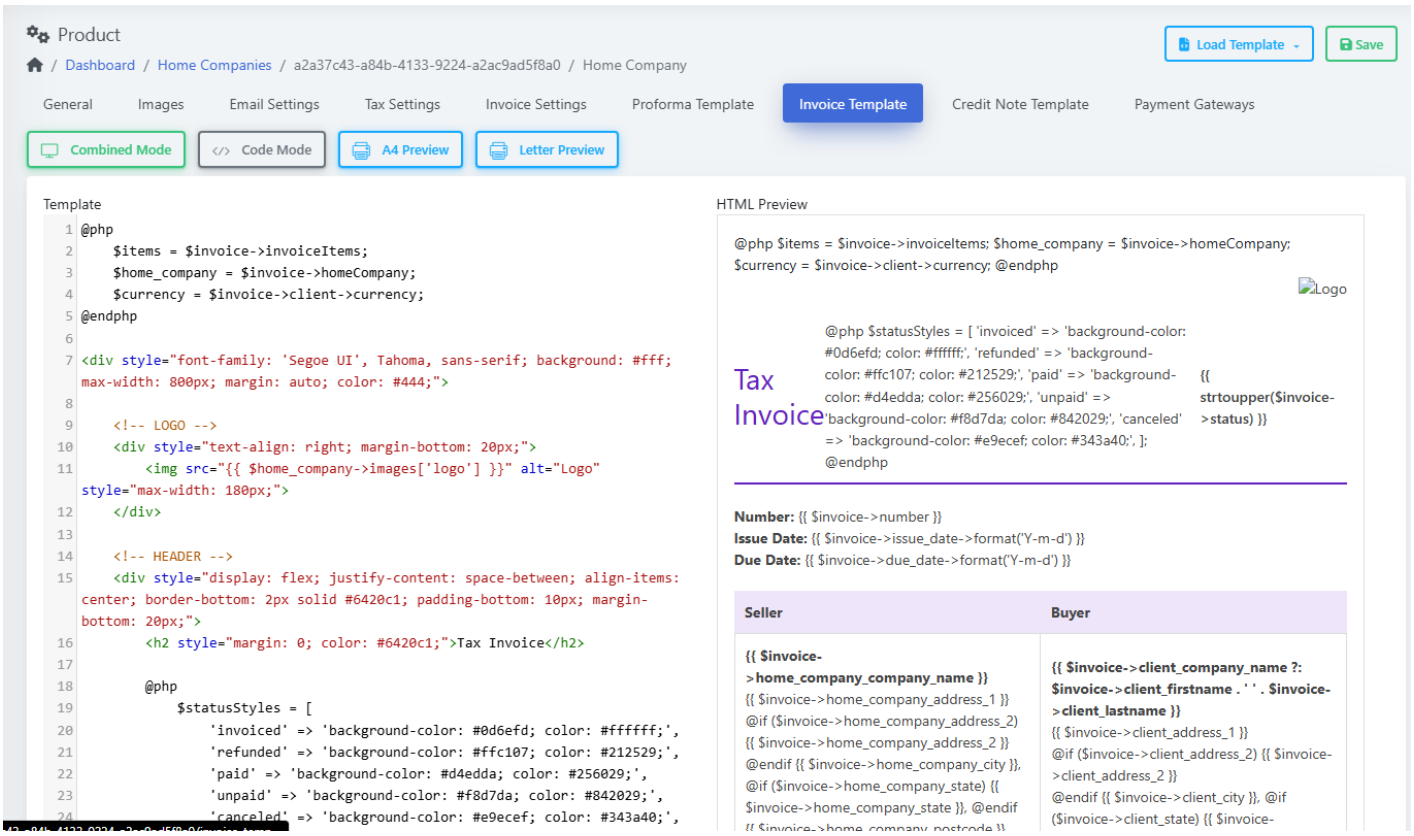
Proforma Template



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

Invoice Template

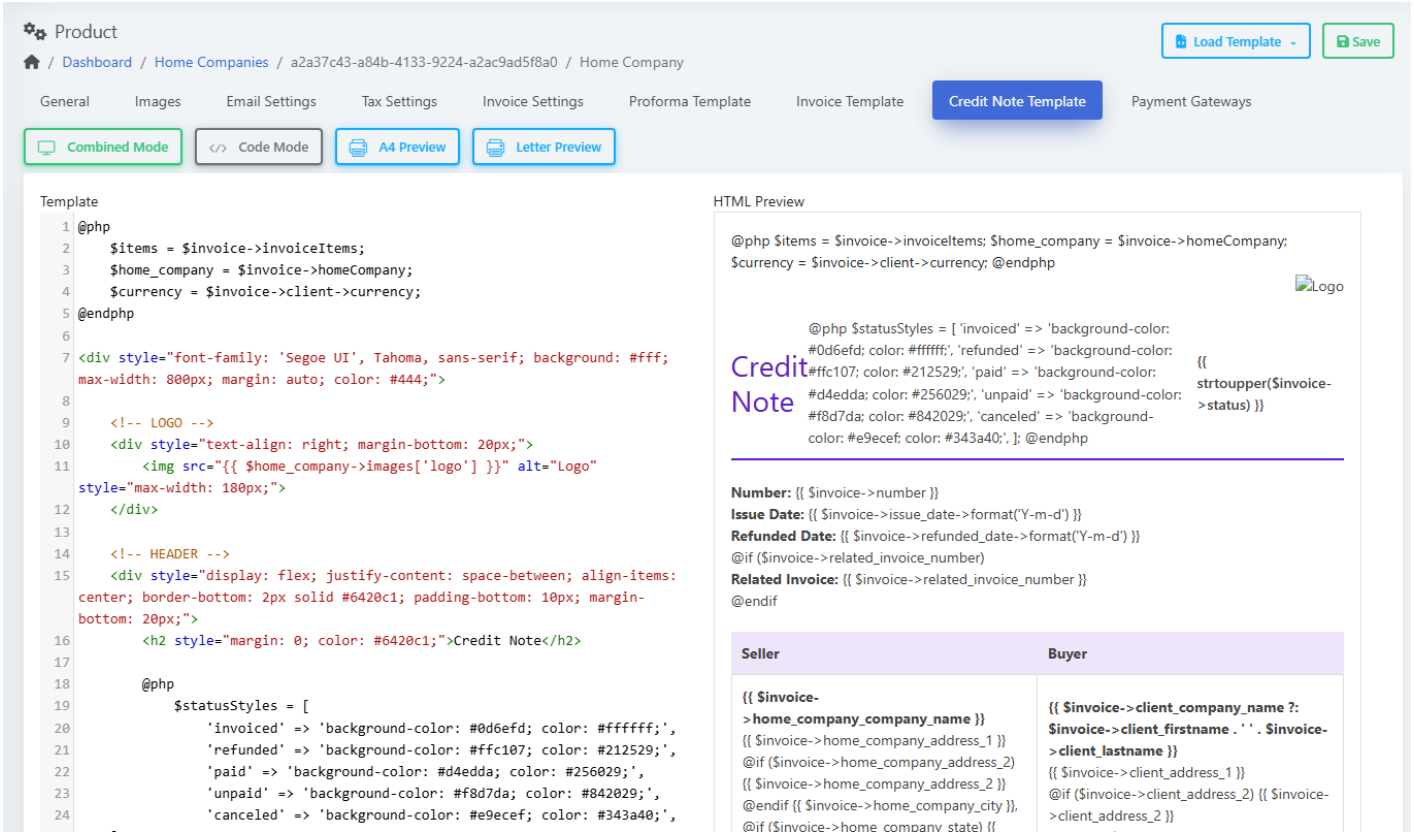
(Screenshot: Invoice Template editor with live preview)



- 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

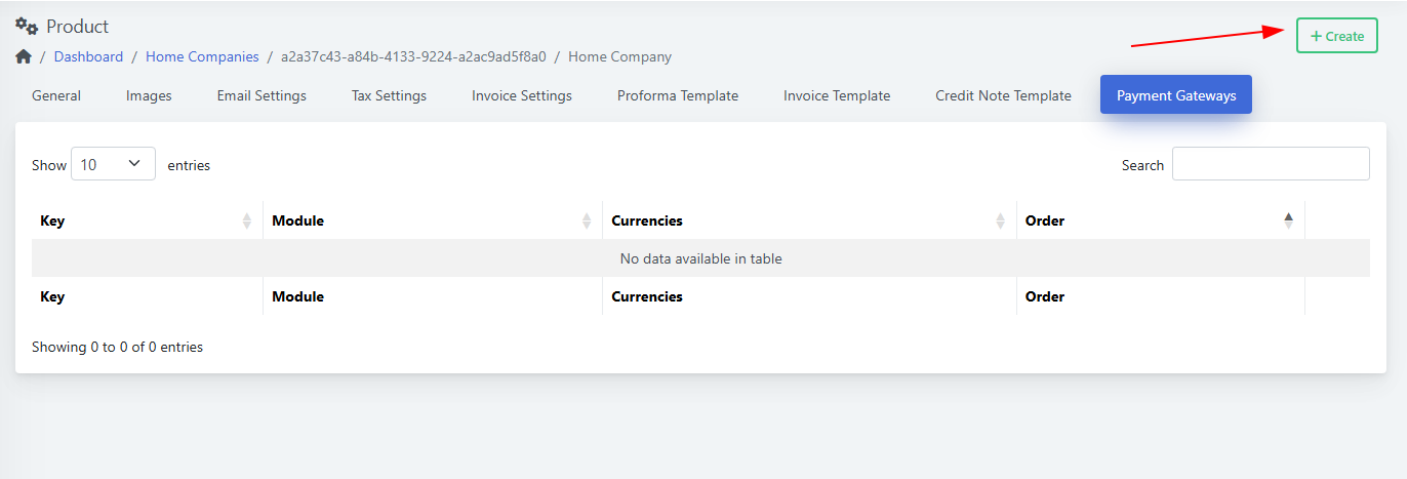
(Screenshot: Credit Note Template editor with live preview)



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

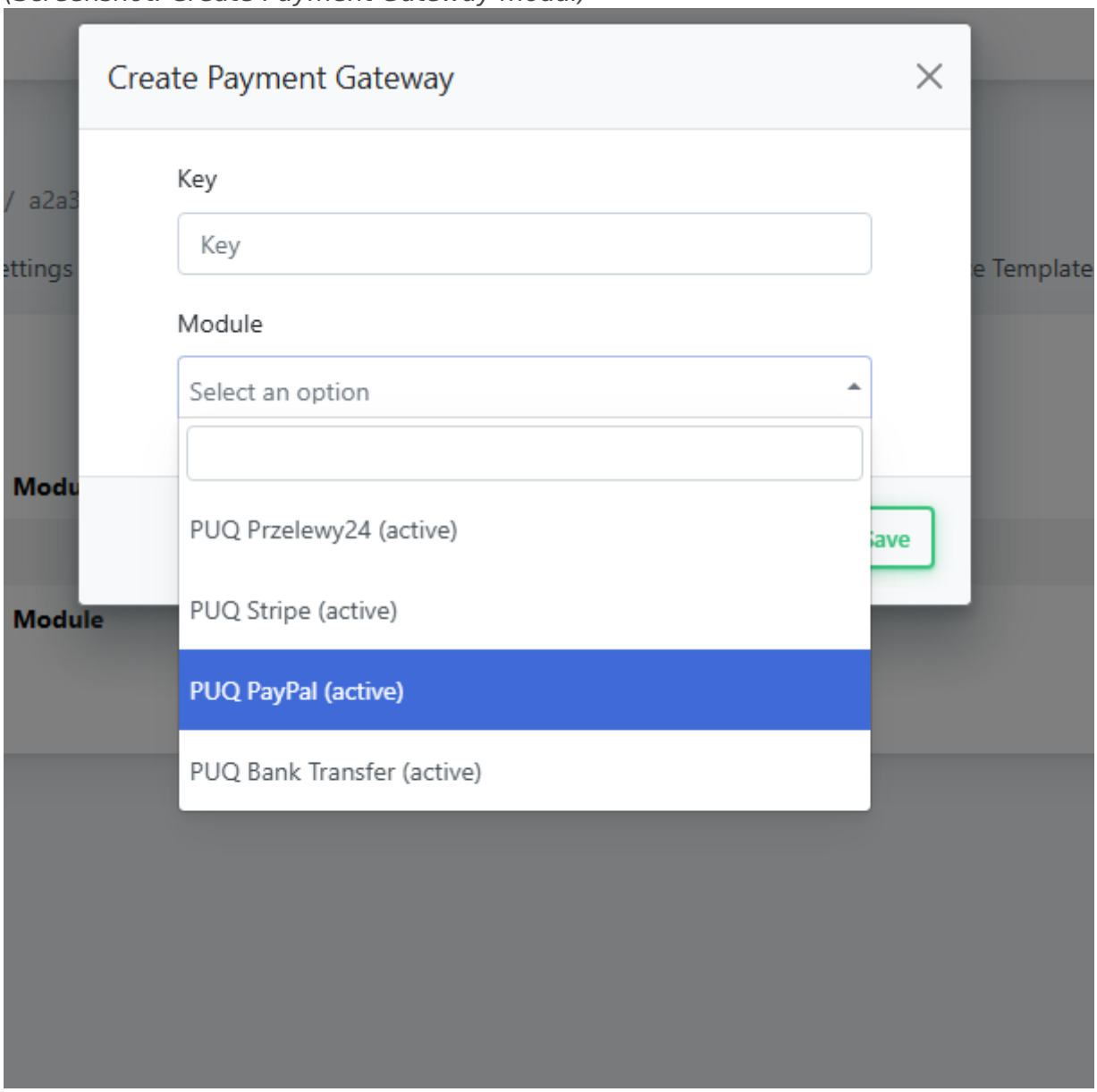
Payment Gateways

*(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)

Product

Save

/ 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

Key

1

Currencies

Select an option

ICON IMAGE

Drag & Drop your files or Browse

Powered by PQINA

English | Ukrainian | Polish

Name

Name

Description

Description

WEB Hook URL

https://dev02.puqcloud.com/static/module/Payment/puqStripe/apiWebhookPost/b8addce0-9182-46e5-9fa9-ca6{

Publishable Secret Key

Publishable Secret Key

Secret Key

Secret Key

WEB Hook Secret

WEB Hook Secret

Sandbox Mode

Sandbox Publishable Secret Key

Sandbox Publishable Secret Key

Sandbox Secret Key

Sandbox Secret Key

Sandbox WEB Hook Secret

Sandbox WEB Hook Secret

Test Connection

- **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**.

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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.

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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
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Updated 28 October 2025 09:30:19 by Yuliia Noha