

Finance Settings

Overview

Finance Settings controls all financial rules — delay periods, penalties, notifications, payment options, and more.

Settings Reference

Setting	Description
Notify On Which Unit Steps	Select which unit pipeline steps trigger a finance notification (e.g., Confirm Reservation, Down Payment).
Notify On Selected Unit Steps After (in days)	How many days after reaching a step before the notification is sent.
Currency	Set the system currency (e.g., EGP, USD).
Paying Options	Add the payment methods available in the system (e.g., Cheque, Cash, Deposit, Transfer). These appear in the Pay screen and Edit Payments.
Paying Destination	Add bank accounts or destinations (e.g., CIB, NBE). These appear in the Destination dropdown in Edit Payments.
Late Payment Status	Add custom status labels for overdue payments (e.g., "contacted", "in progress", "pending"). Used in the Update Payment Status section.
Selected Unit Steps To Notify - SMS Content	The SMS template sent to clients when a unit step notification fires. Supports placeholders: <code>[delayed step]</code> , <code>[number of days]</code> , <code>[units names]</code> .
Number To Words	Select the language for converting amounts to words on receipts and invoices. Two Arabic types available.
Delay Payment Grace Period (In Days)	Number of days after a payment's due date before it moves to Delayed Payments.
Delay Payment Fees ON/OFF	When ON, automatically calculates a penalty on delayed payments.
Delay Payment Fees Percentage %	The penalty percentage calculated from the delayed installment amount.

Setting	Description
Remind Client with payment before (days)	Number of days before a payment is due to send a reminder notification to the client.
Notify Payments	When ON, sends payment notifications only to users who have payment permission.
Extra Delay Payment ON/OFF	When ON, enables the extra delay period and Extra Delayed Payments tab.
Extra Delay Payment Timer	Number of days after the regular delay grace period before an installment moves to Extra Delayed Payments.
Hide Units Section On Client Profile	When ON, hides the units section from the client's profile view.
Return Refunded and Discarded Units to Hide	When ON, units returned after a permanent refund go to Hidden status instead of Available.
Invoice Additional Note	Custom text added to the bottom of all invoices/receipts.
Payments Export Validation Hour (In Hours)	The time window (in hours) during which a payment export can be validated.

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