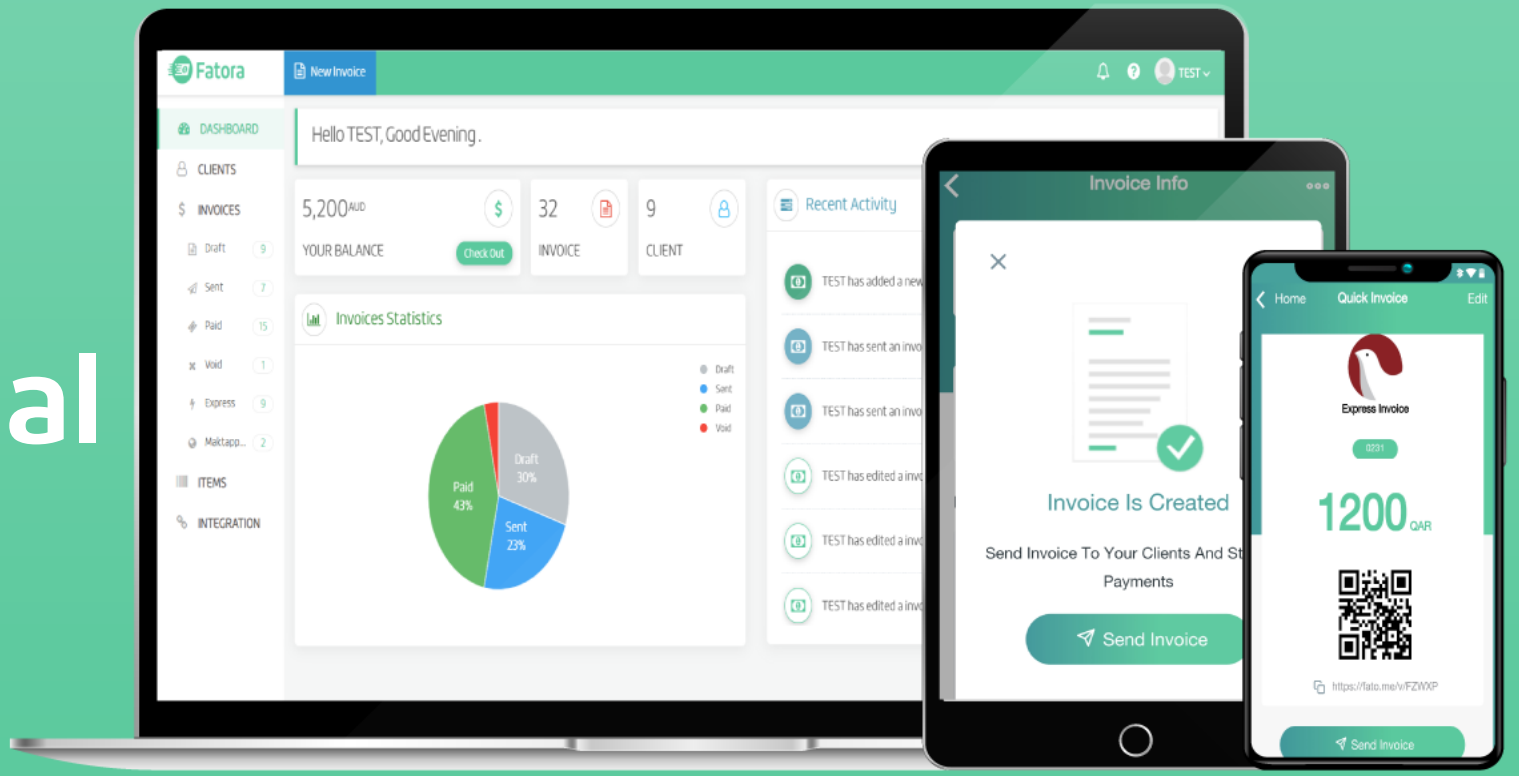
Fatora

Fatora User Manual

Fatora.io



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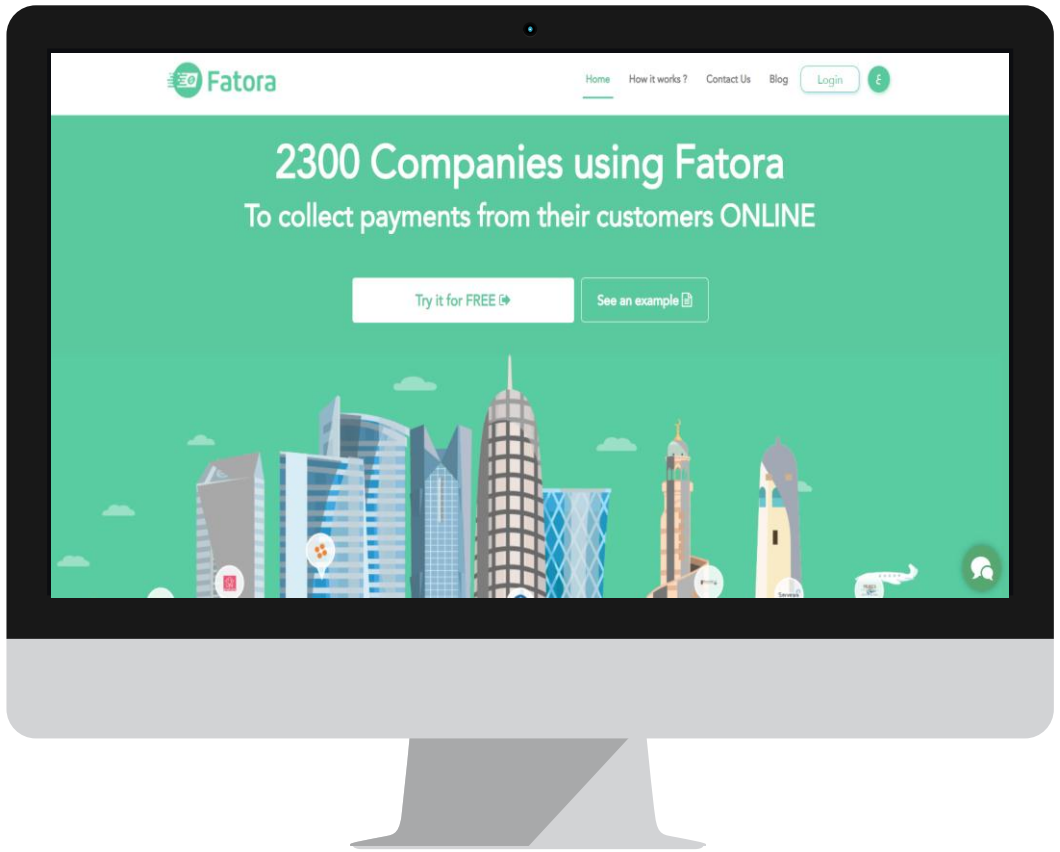

Fatora is the best choice for your company where in:

Time saving

Our clients save about 3 hours in every week and spend more time in the management (administrating)

Get your payments faster

By using Fatora, our clients get their money faster about 7 days than usual

Suitable for small business

Helps to create, send and follow invoices with clients via multiple payment methods and (save)Get rid of the tiredness from using electronic paying

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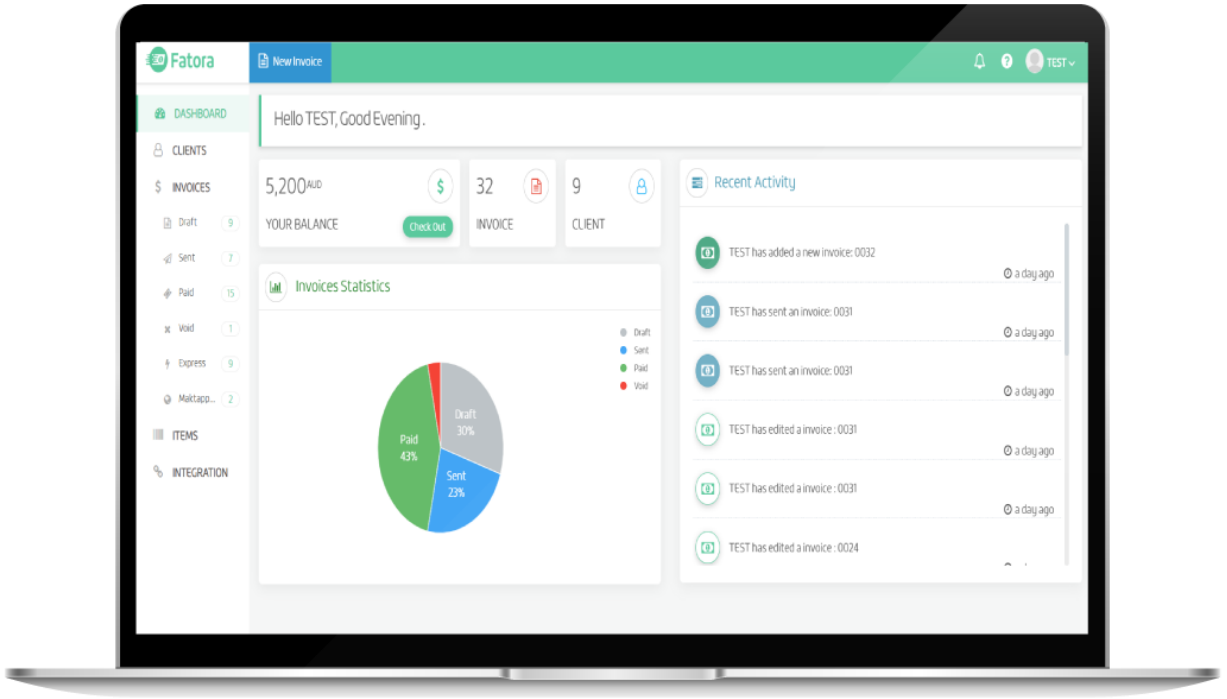
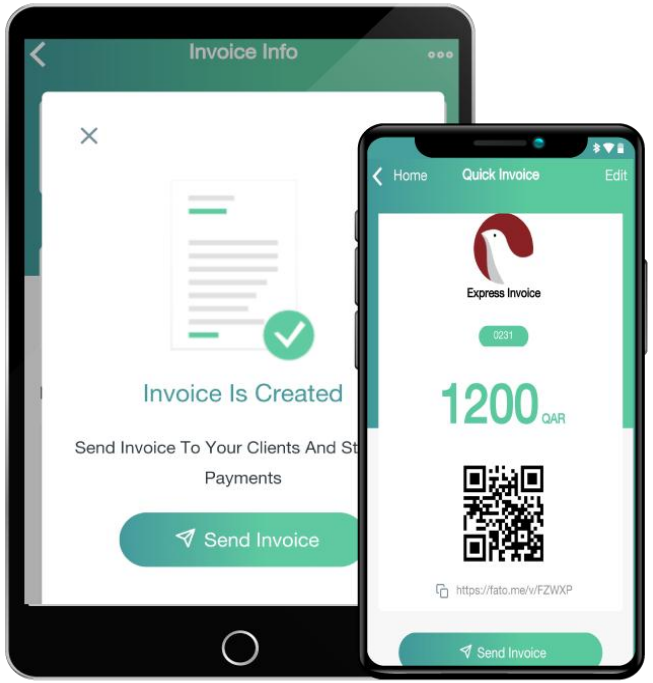
Easy to use Fatora can be used on your PC or through your mobile





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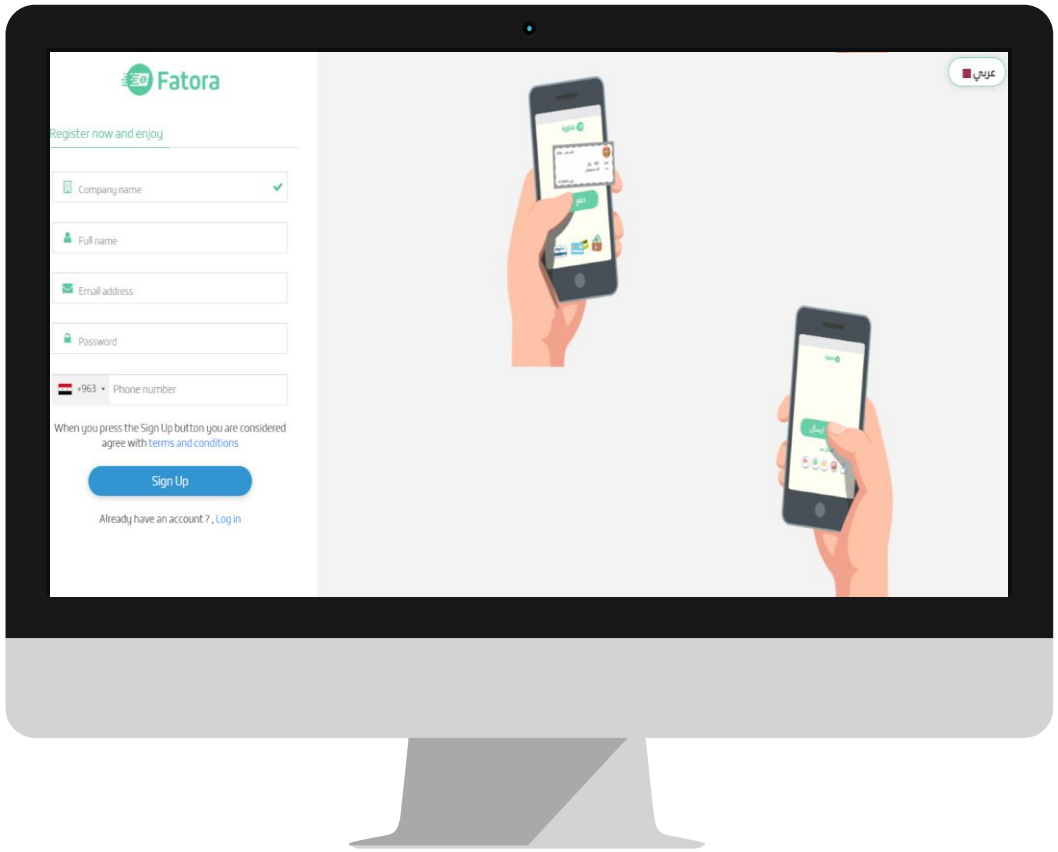

Create a new account on Fatora

✔ Click on try Fatora for free

- Write your company name
- Write your name
- Enter a valid e-mail
- Enter a strong password
- Chose country then enter the mobile number

✔ The finally step is click register

Registe

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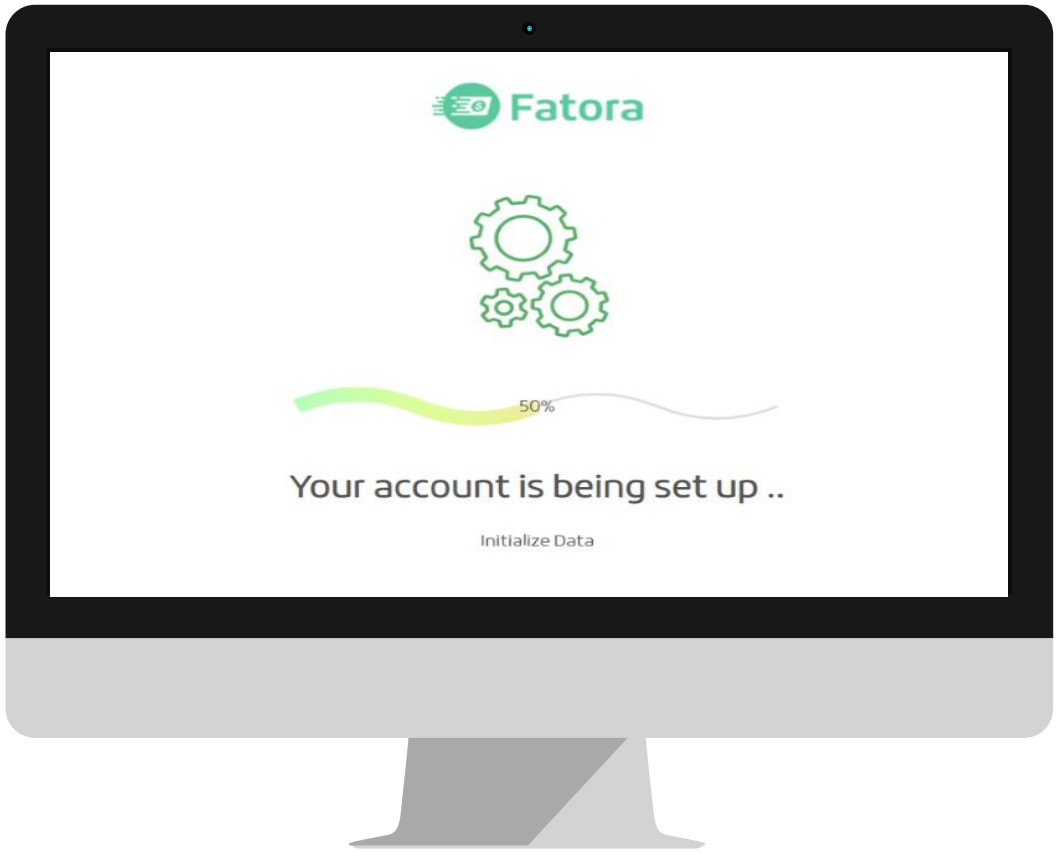

After registration wait some seconds

- The account setting is configured for use
- After configuring the account, a Help window will displayed
- You can create your first invoice and add your clients
- You can monitor your account and add your bank account

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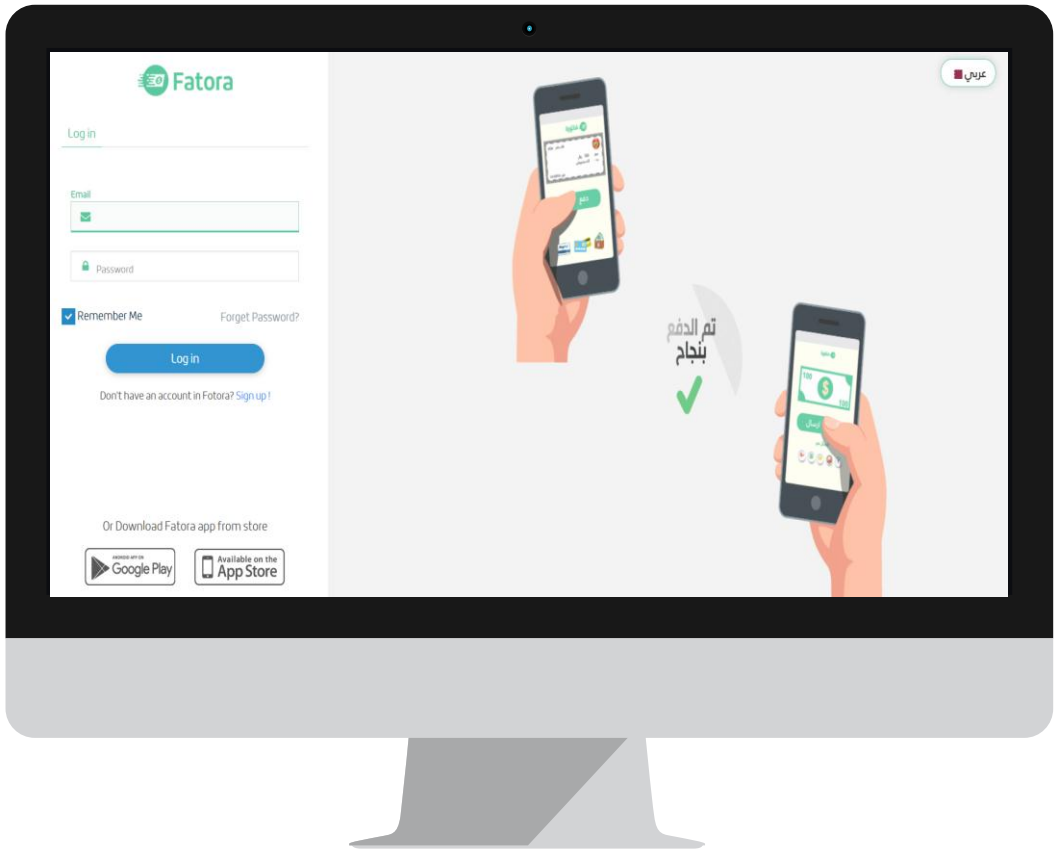

Sign in your account in Fatora

- Click on (login in)at the top of the page
- Enter your email correctly
- Enter the password you created when creating your account
- The finally step is press login

Log in

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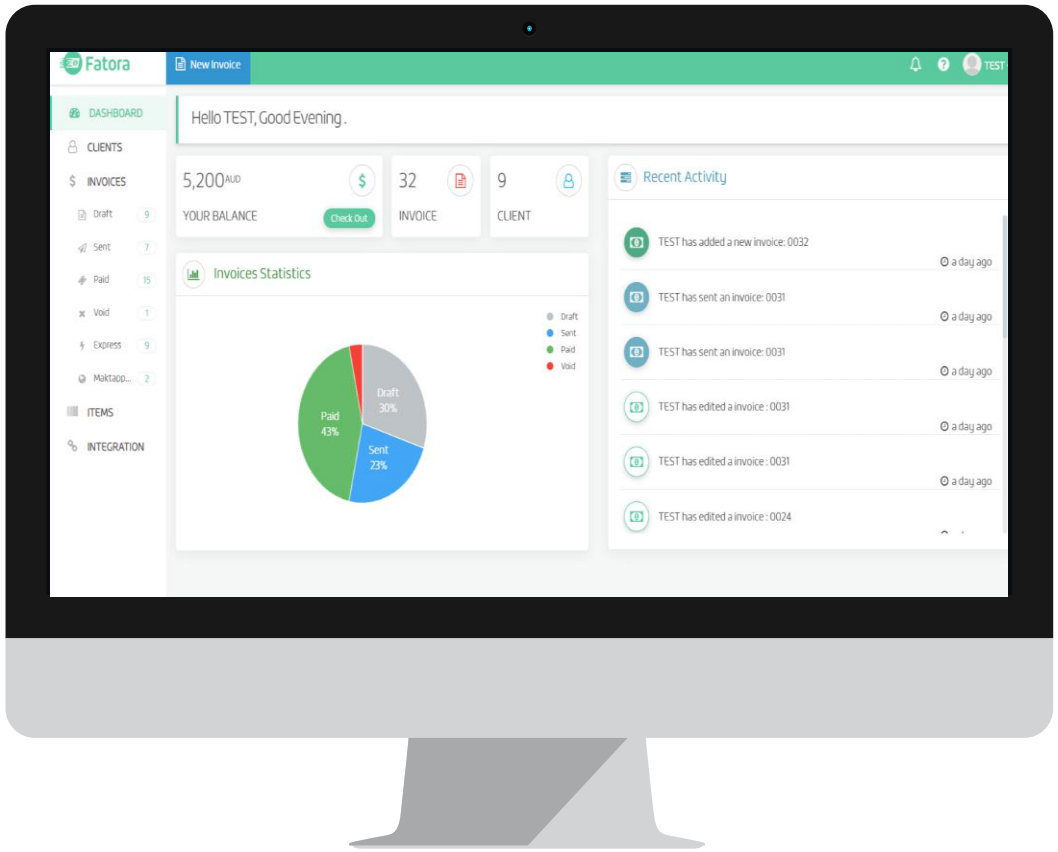

After logging on your account in Fatora

You will find the Home screen features and control panel

The main screen of Fatora is designed in a way that gives the user easy access and information about all the basic components and tools that use it frequently. This tools contain:

- The main screen banner contains several tasks
  - Add a new invoice
  - User notifications
  - Means of assistance
  - User name and settings
- Count the invoices
- Number of clients
- Statistics about invoices number
- Total and available balance
- Latest activities and transactions

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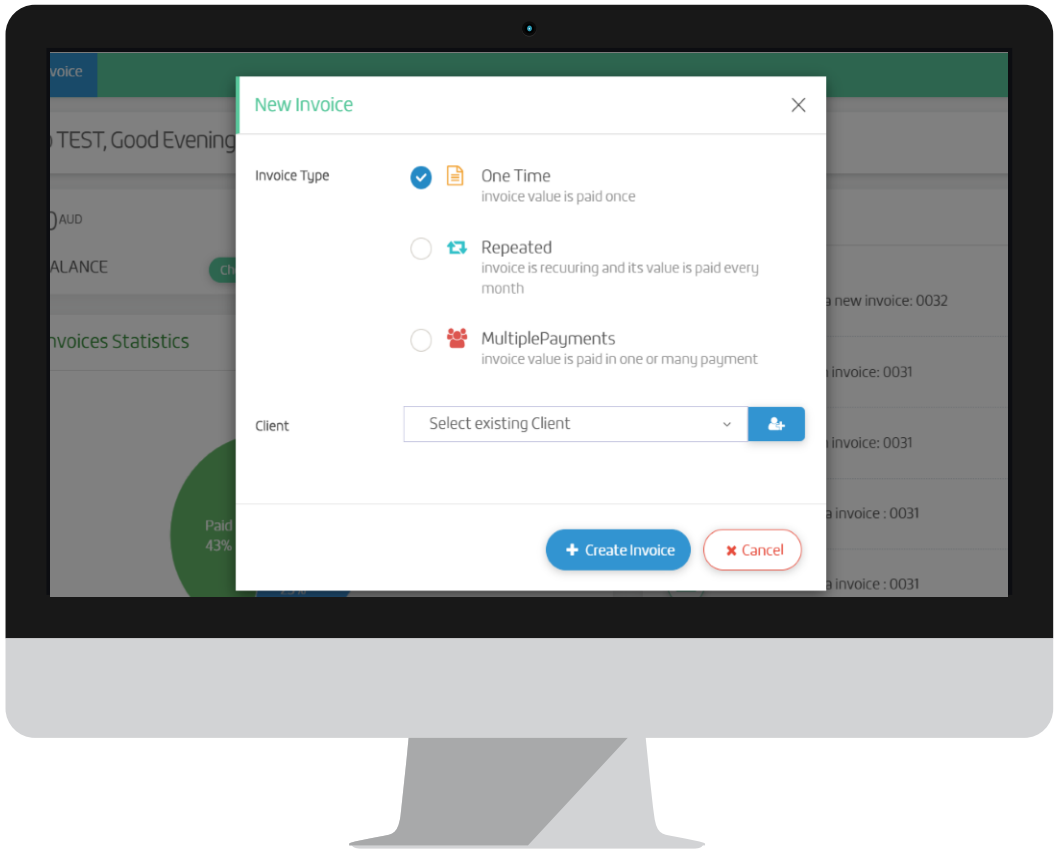

Add new invoice to send to the client

Click on the New invoice icon in the Home page banner at the top

new invoice

Choose the invoice type as the screen

Choose old client or add a new one

Then click the Create invoice icon

+ Create invoice

Then choose the items and actions

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✔ Types of invoices that available for sending to the clients

One-time invoice

When you choose this type, you can create an invoice and share it with your clients. Your clients will pay it once and then the invoice will be paid

Installments invoice

This type of invoice is for your transactions based on the monthly installments where you can create an invoice and put the monthly installment and choose the number of installments and then share with your clients who will agree to pay these installments to be converted monthly to your account automatically. You can go at any time to this invoice and stop these payments.

Multiple payments

This type is suitable for a payment that you will collect from different clients, where you can create an invoice and choose the maximum number of payments on it and then share with a group of clients who will pay until your invoice is completed.

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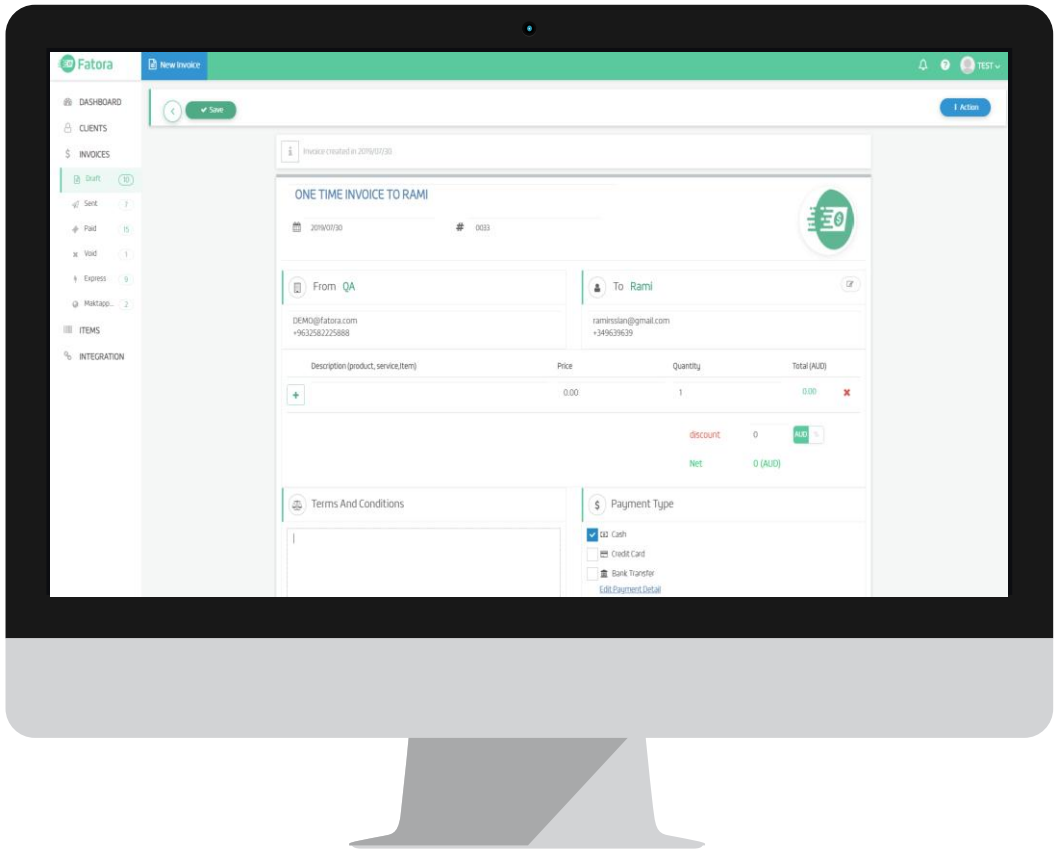

Save the invoices and use the actions

After you click Create an invoice, some actions will appear and need to be completed

- Add products whether new or added, quantities and prices
- Terms and conditions and available payment method
- Attach files to be sent to the client or available product images
- After completion we will find above some necessary actions such as

Save The invoice is saved for later use

Actions Here we find Invoice Sharing, Activities, Printing or Deleting

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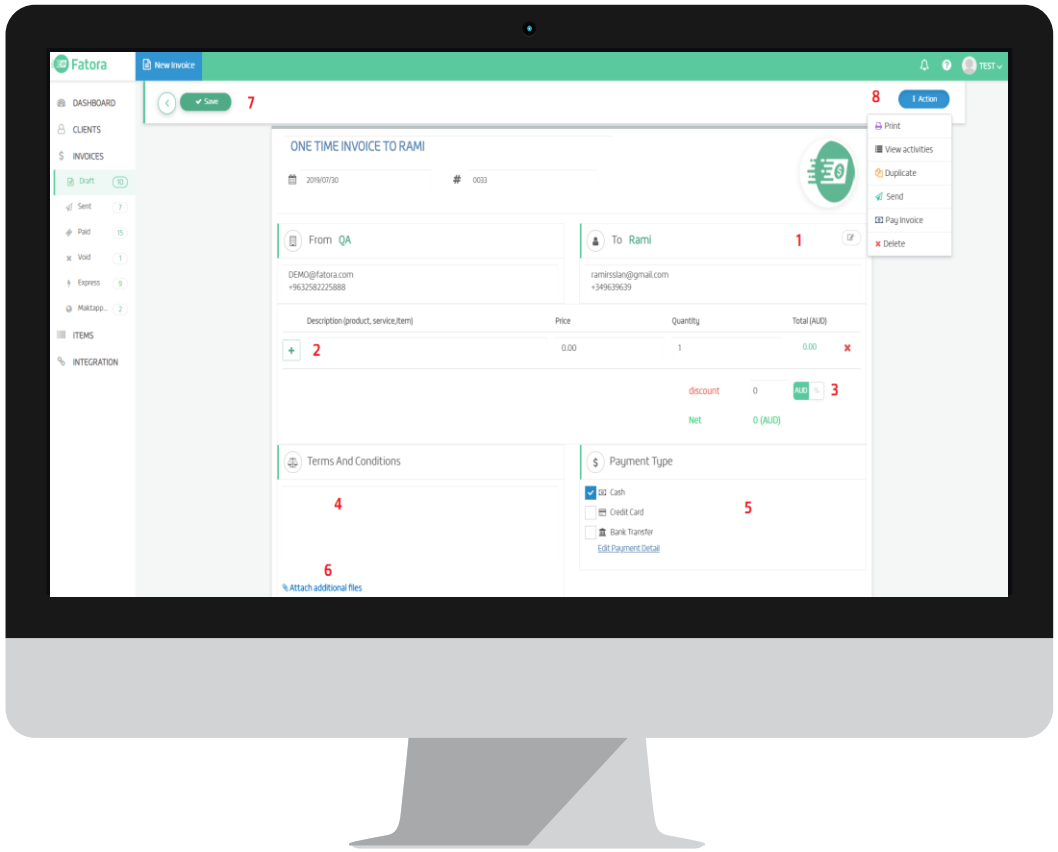

How to create your invoice and use the actions

After you click create an invoice, some actions will appear and need to be completed

1. From here we can modify the client.

2. Add items here. price and quantity, We can add more than one product by clicking on +

3. Here we enter the discount as a percentage or as a fixed amount.

4. Here where you can enter the conditions and the verdicts “default text can be set through the settings for all invoices”

5. Here we choose one way or more ways to pay.

6. If you need to attach a photo or document we upload it here.

7. Save button to save the invoice.

8 -or we can go to actions to send the invoice or delete it or add cash payment, In all cases, your invoice will be saved. In case the invoice is of a Installments or multiple payments you'll see a field to choose the number of payments

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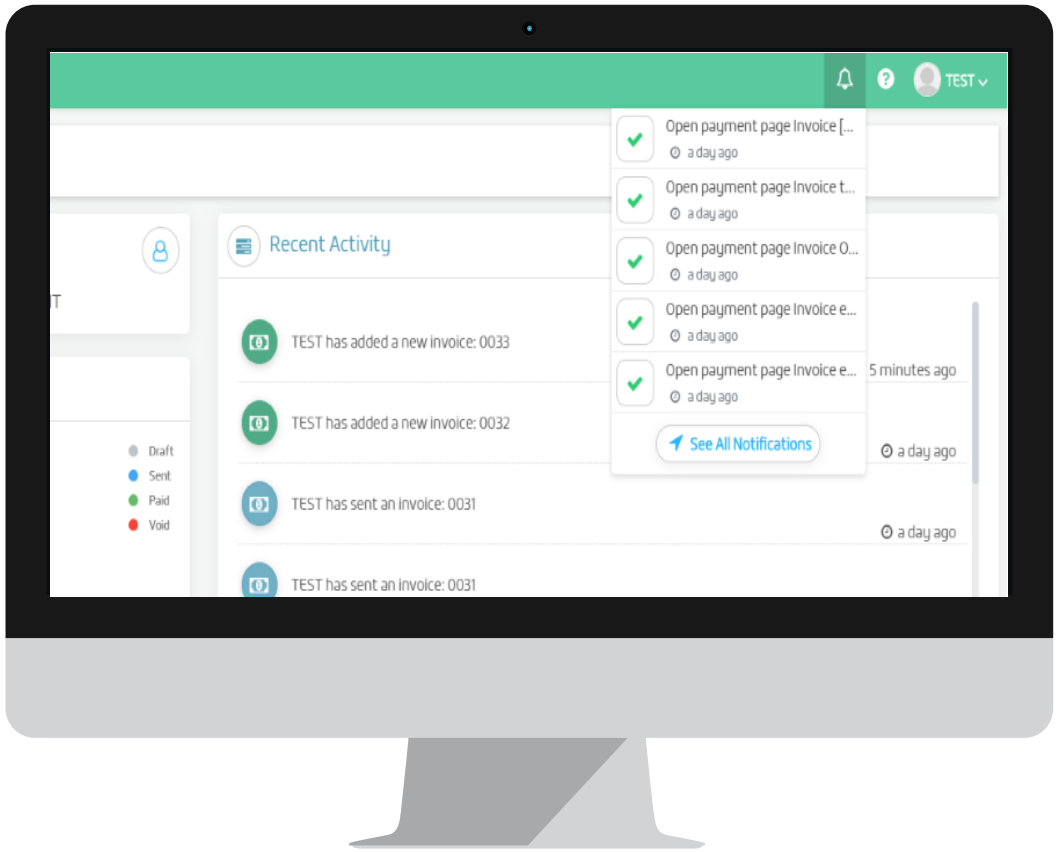

✔ Following up notifications and transactions

Click the Notifications icon at the top of the homepage

All notifications can be displayed in a separate window and all of the details are displayed to you

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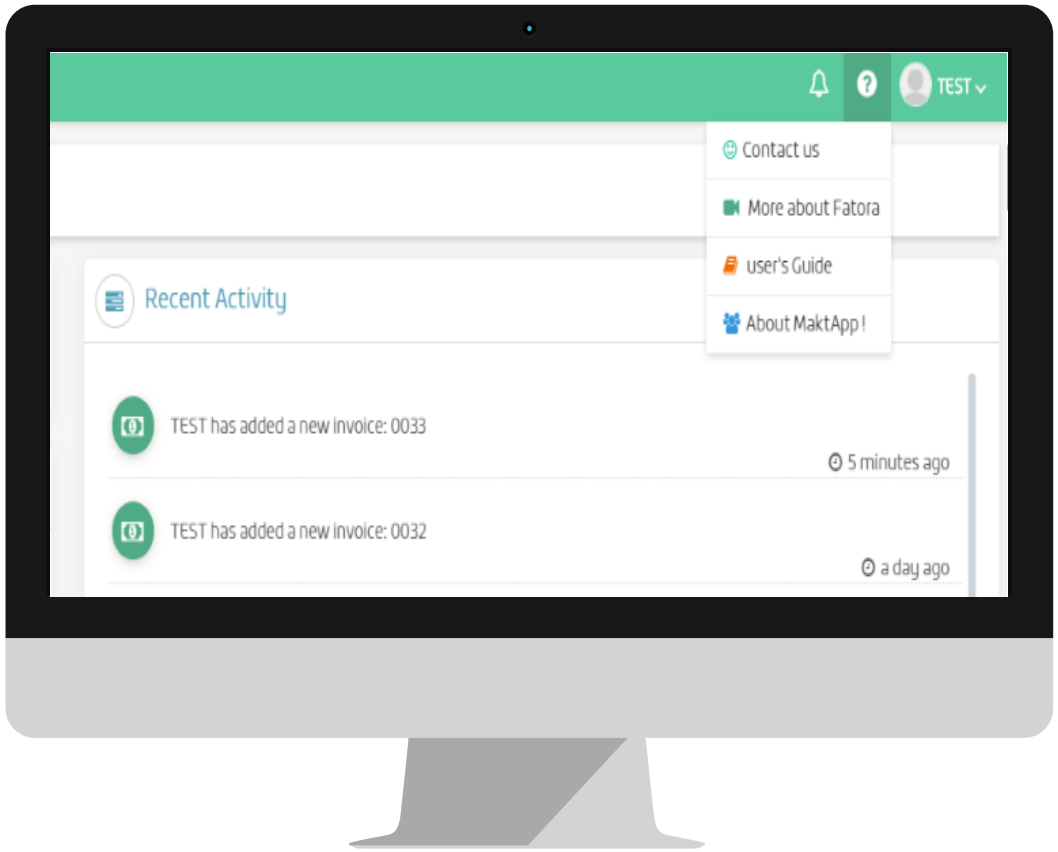

✔ assistance and user Guide

Click on the Help icon at the top of the banner

This list contains a number of tasks to access the information faster

- Contact us
- about Fatora
- users Guide
- about Maktapp

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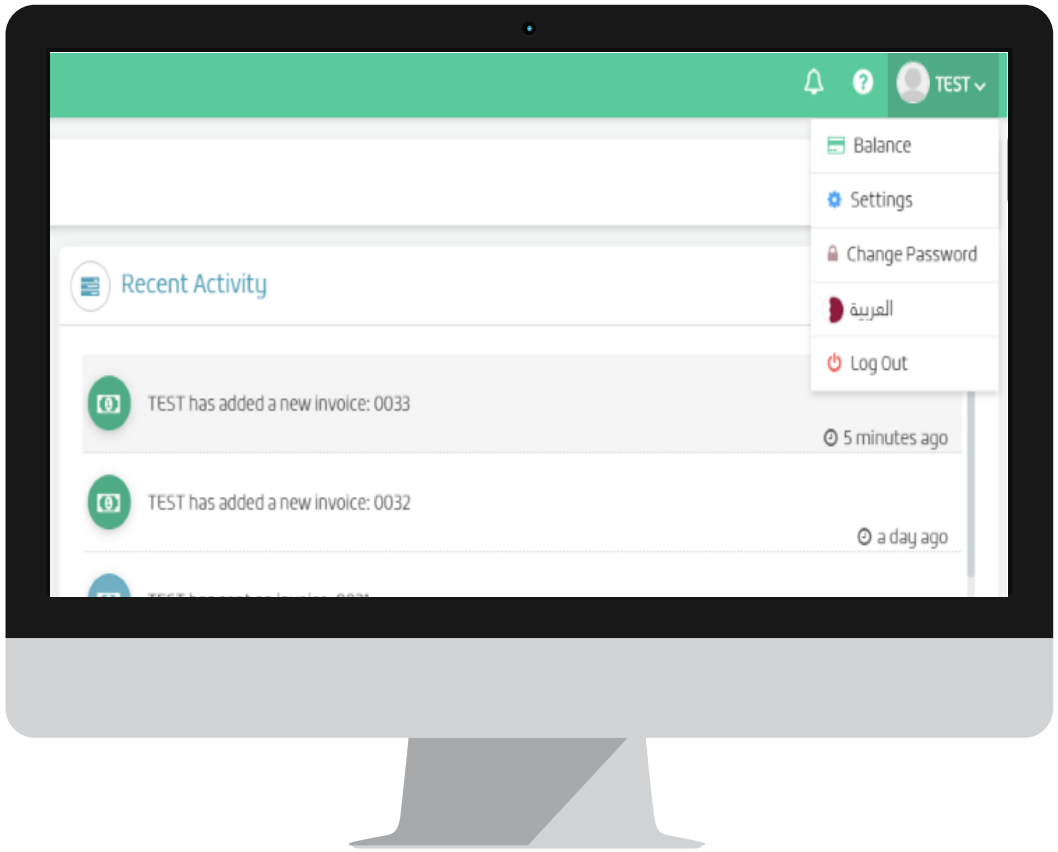

✔ User name and settings

Click on the Username icon in the banner of the home page above

TEST

This page contains a number of important tasks to follow up the balance and Settings

- **Balance**
- **Settings**
- **change Password**
- **change the language**
- **logout**

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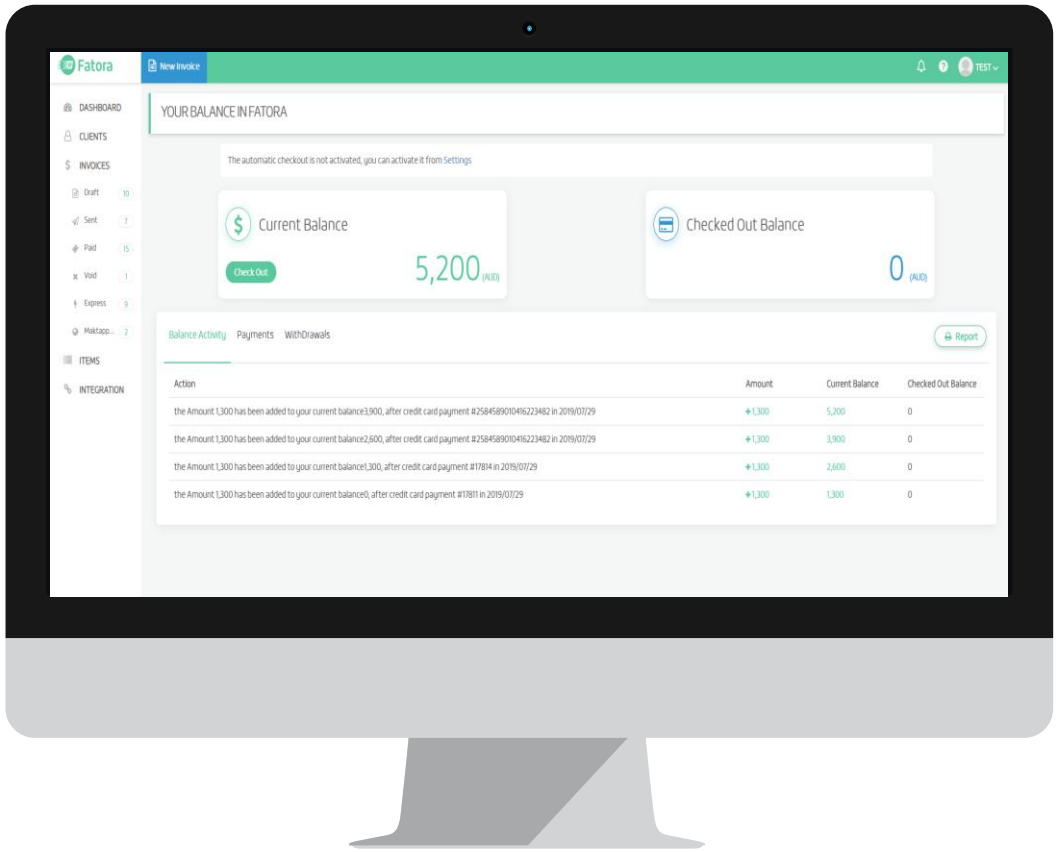

Available and withdrawn balance

Click on the Username icon in the home page banner above and choose the balance

Balance

This page contains a number of important tasks to follow up the balance

- To Know the current balance and the withdrawn balance from Fatora
- Learn how to activate or deactivate automatic withdraw with a direct link
- dealings on balance
- Payments
- withdraws

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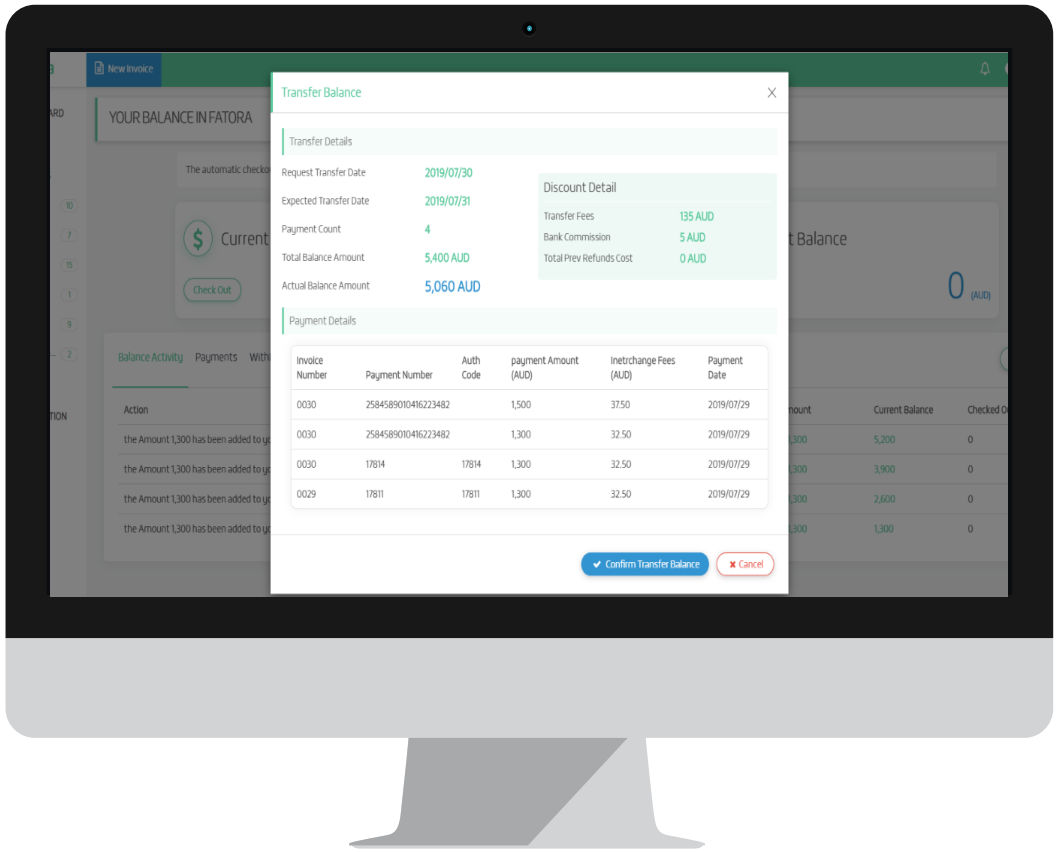

How to withdraw the balance and methods of dealing?

Click on the Username icon in the home page banner above and choose the balance

Press the debit button at the bottom of the current balance

Withdraw balance

Then we will definitely click on Confirm Balance Withdrawal

Confirm Balance Withdrawal

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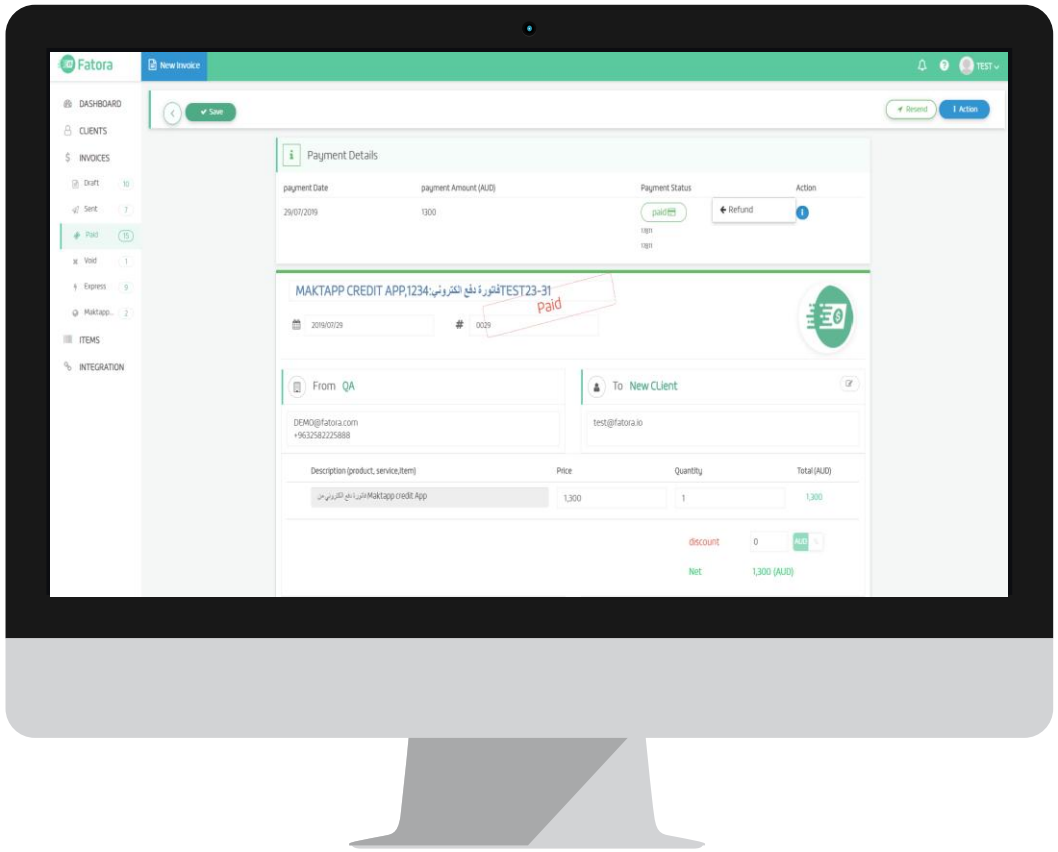

✔ The Refund to return a payment

If you need to return a certain payment you have paid electronically we can go to a table Payments Within the balance screen or from the invoice details, we choose the payment and then from the actions menu

Actions → **Refund**

- ✔ Provided that the amount of the transfer + commission amount is available
- ✔ Fatora team will transfer the payment and send a notice

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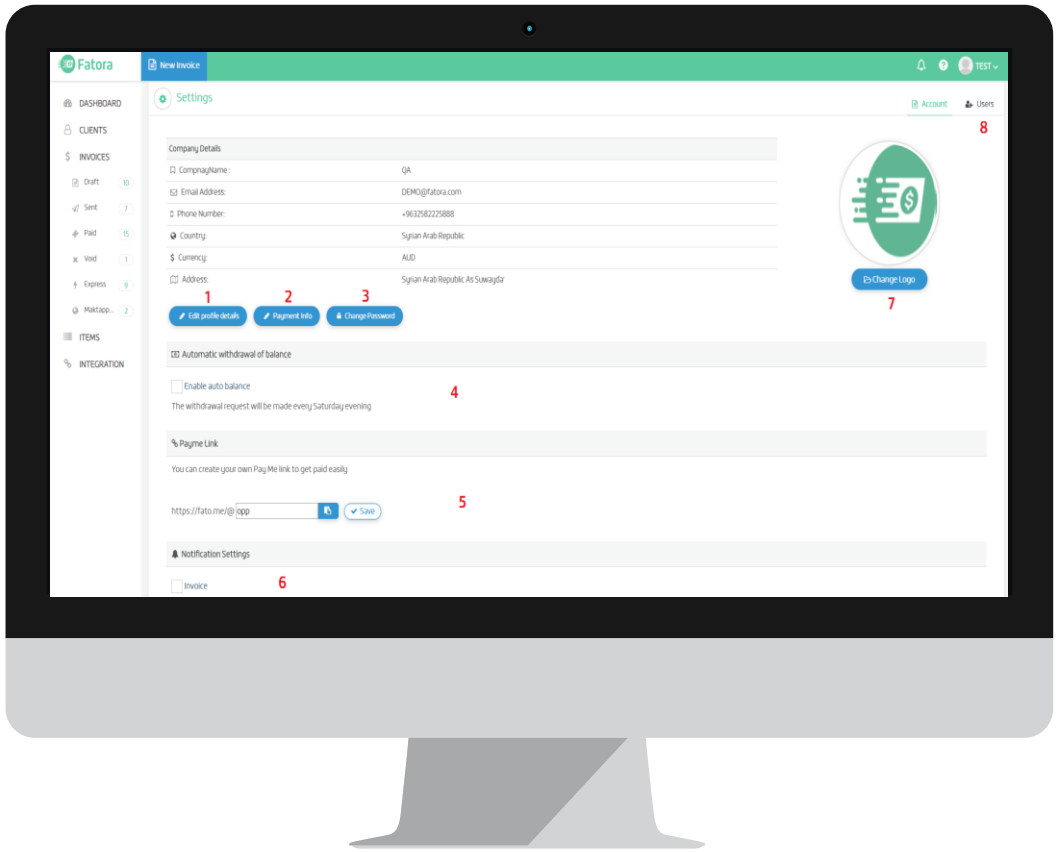

✔ Setup control setting

Click on the Username icon in the top banner and choose Settings

Settings

it contains a number of important tasks

- ✔ 1. Here we modify the company's data.
- ✔ 2. We place payment data and set the terms and conditions that will appear in the invoices.
- ✔ 3. Change your password.
- ✔ 4. Automatic withdrawal of the balance (second method)
- ✔ 5. Create a direct payment link and copy it to send to clients.
- ✔ 6. Here we set up alerts
- ✔ 7. Modify the company logo (this logo will appear in your invoices).
- ✔ 8. To add users to your account.

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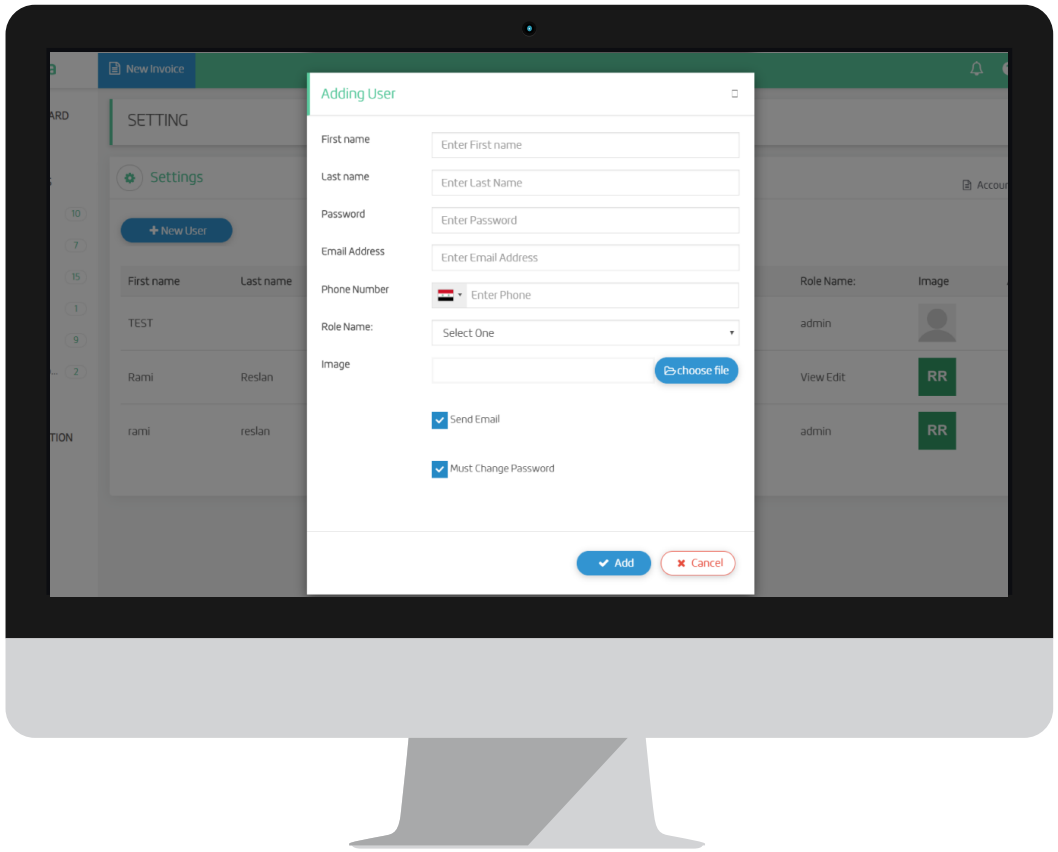

✔ Add users

Click on the Username icon in the top banner and choose Settings

Settings

Click on the Users icon and then you can add and you must:

- ✔ Fill in all data accurately and enter a valid phone and e-mail
- ✔ Add a photo for easy account clarification
- ✔ Select the available options and then click the Add icon

✔ Add

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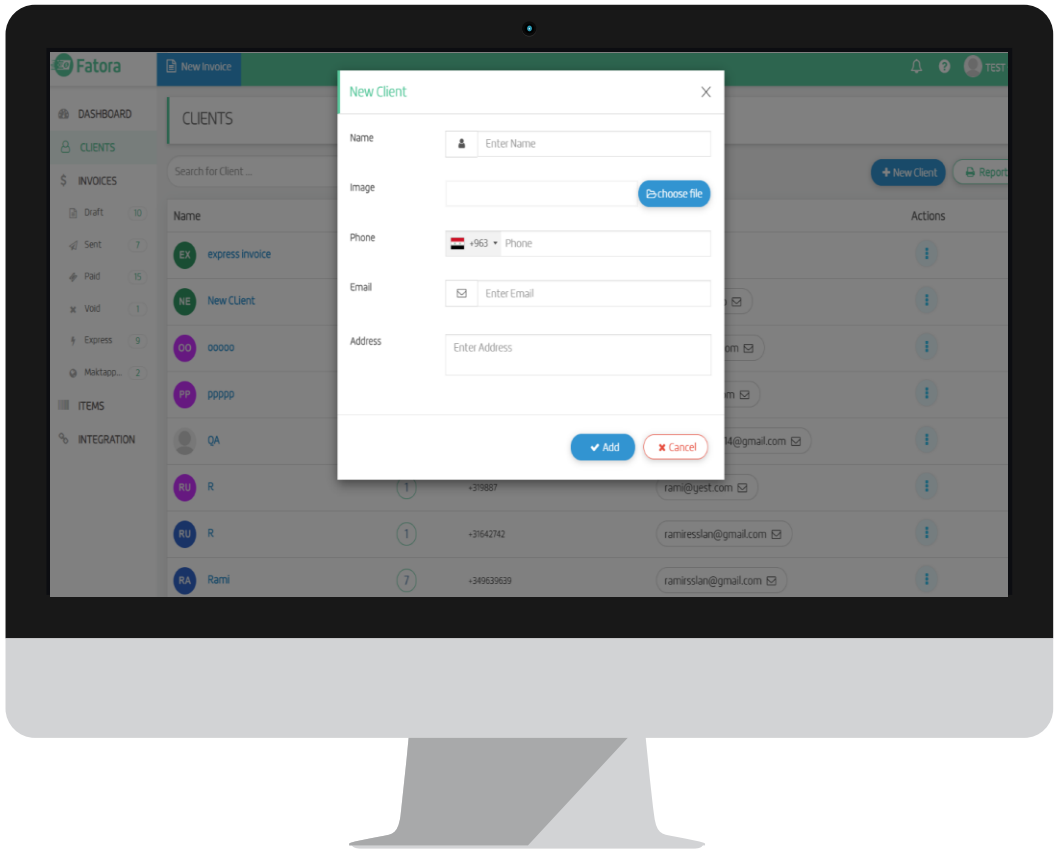

✔ Clients and how to add new Clients

Clients are the core of business activity and through the Clients screen we can add all traders and Clients we deal with. To go to the Clients page, click on the Clients icon, in the right-hand control box.

Clients

It contains complete client's data with details of each client with some other tasks

search for a client... + Add Client report

✔ When you add a client, you must enter the data exactly where it will appear within the Clients list and you can send a message or even modify the data. after entering the data, you can click on

✔ Add

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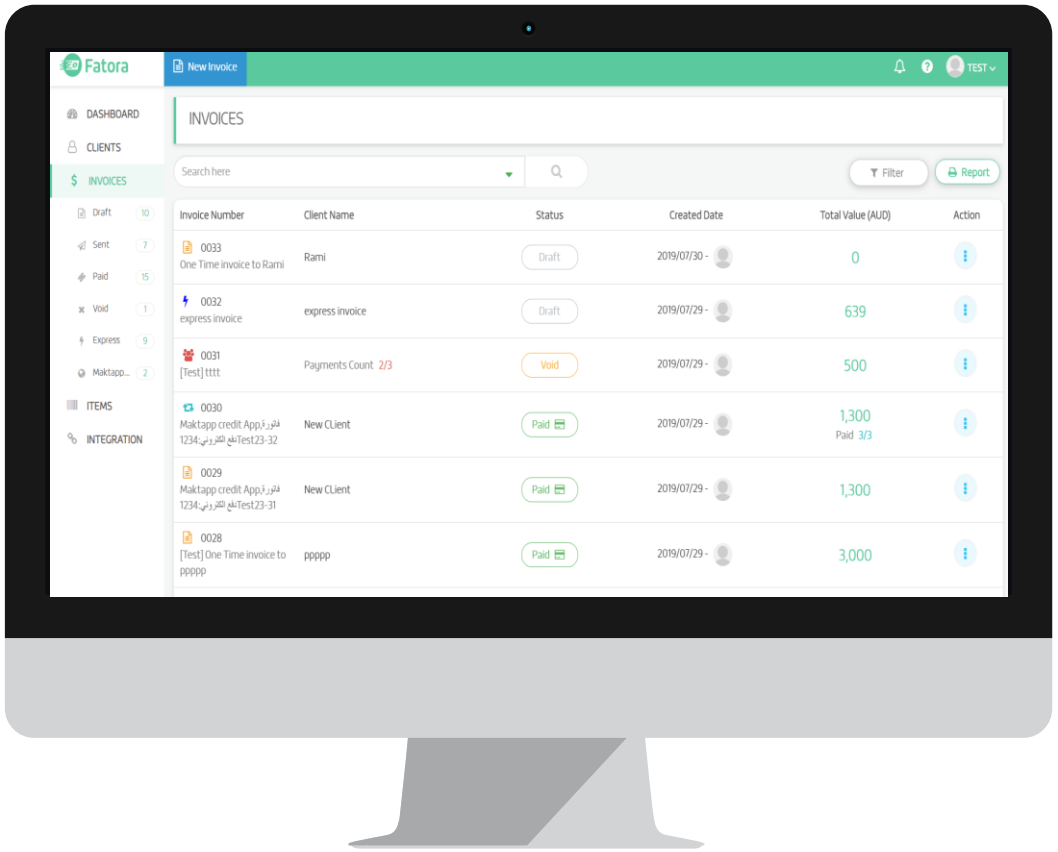

✔ Invoices sorting and reporting

Click on the invoices icon in the control panel on the right and have submenus such as

$ Invoices

Draft Sent Paid Quick

It contains complete invoices data with each client's details with some other tasks

search here..... Sort report

Actions

This action is next to each invoice for a number of tasks:

Here we find the send, activities, printing or deleting

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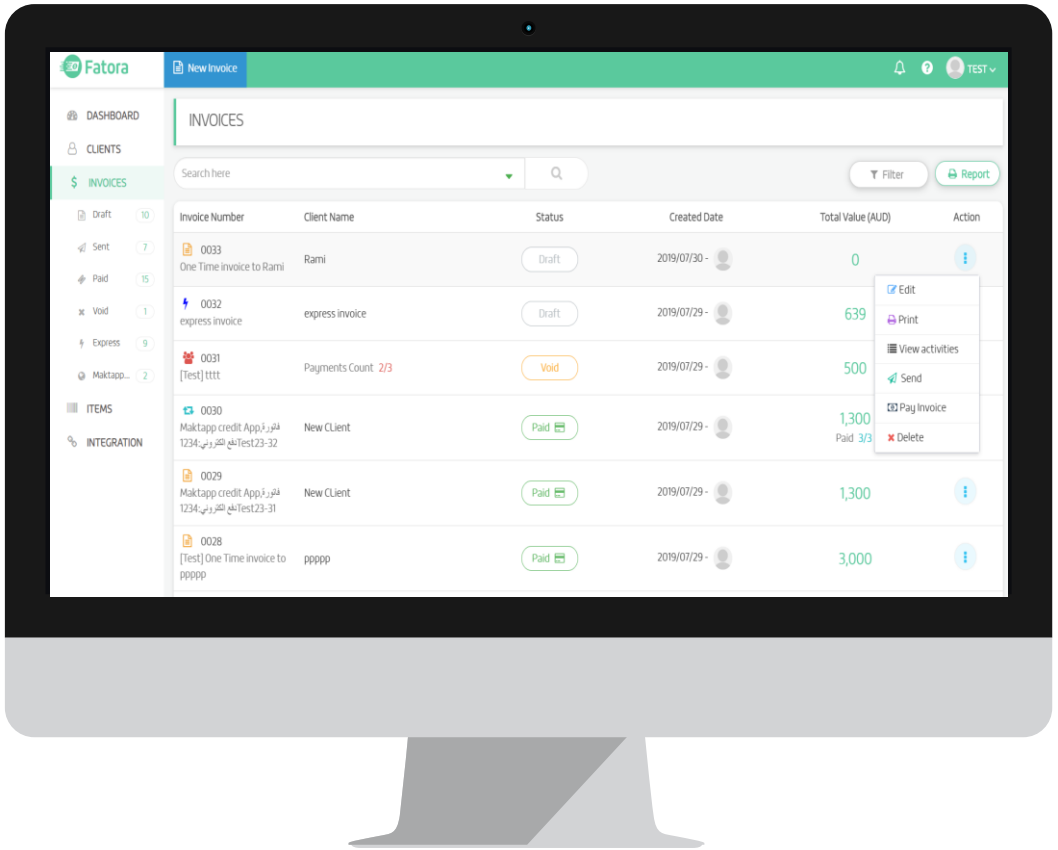

✔ invoices, sorting and reporting

By clicking the Actions button next to each invoice, a list of actions appears, depending on the status of the invoice:

Actions

✔ **1. Edit:** To open the invoice and modify the content (clients - items - price. Etc.) (stipulated) Invoice status is not paid.

✔ **2. Print:** Prints any invoice.

✔ **3. View Activities:** To view the latest activities.

✔ **4. Send:** to share the invoices with your client, if the invoice was paid, the message arrives to your client says thank you for paying the invoice.

✔ **6. Delete invoice:** We delete an invoice stipulated that its status is new.

✔ **7. Cancellation:** invoice will be canceled, but if the invoice has a pay through the credit card we can't cancel the invoice until making refund on this payment

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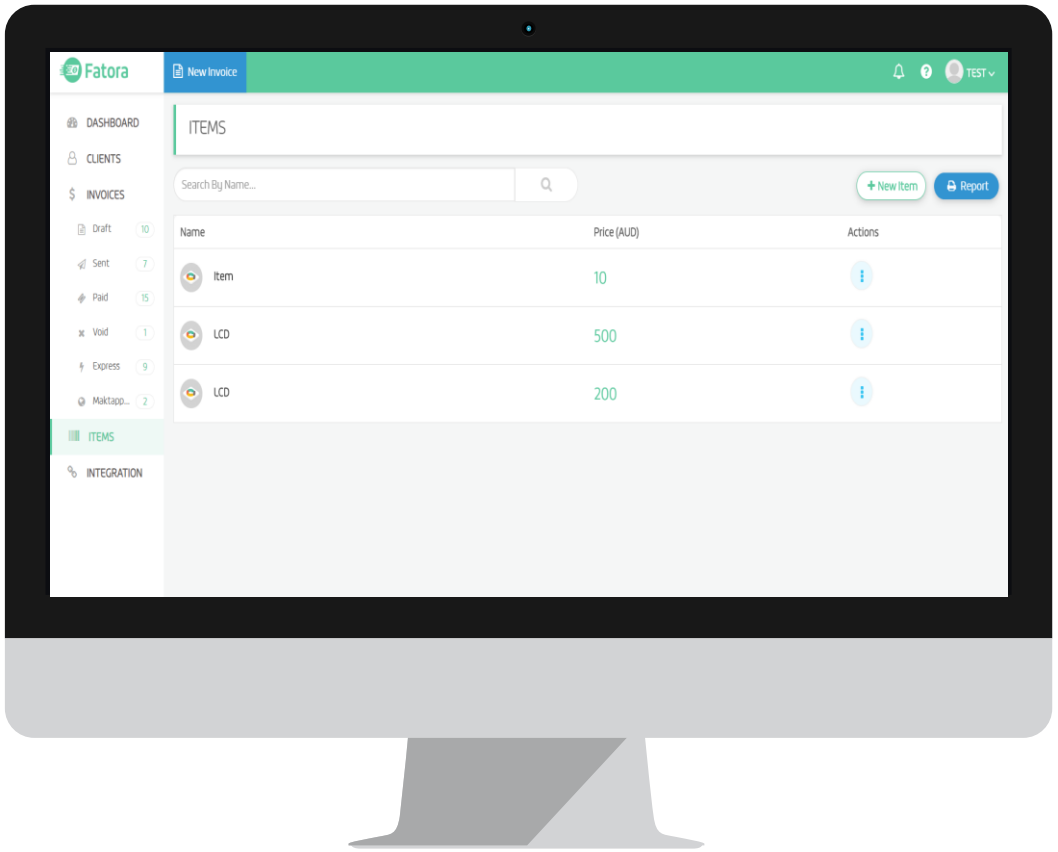

✔ Items and how to add a new item

Click on the items in the control panel on the left to sort or edit them

Items

It contains item data with special details and prices with some other tasks

search by name.... + New Items Print

✔ When you add a new item, enter name and data and click Add

✔ Add

Actions

This action is next to each invoice for a number of tasks:

Here we find an update to add new data or delete the item

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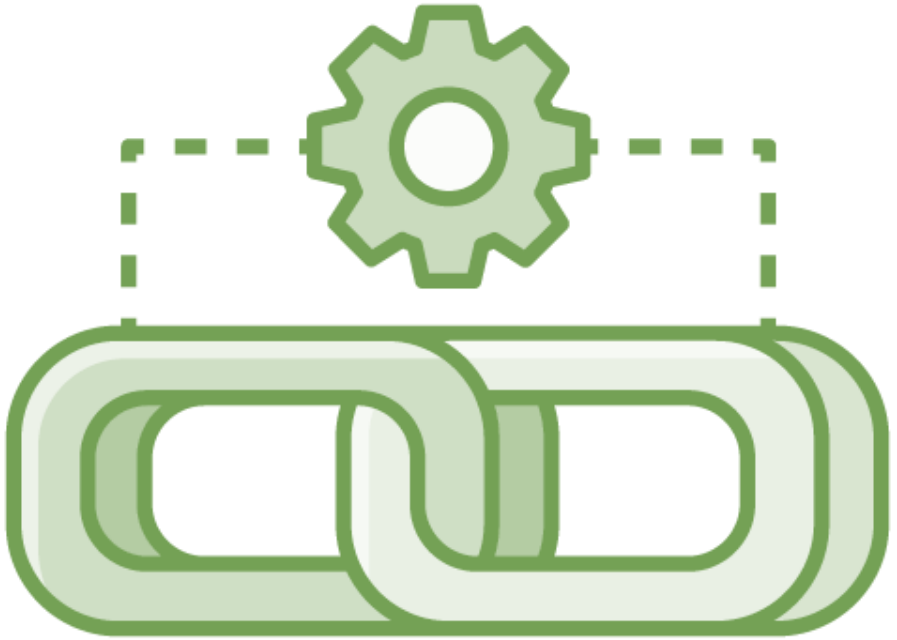
You can link Fatora

Easily with your site



Fatora Supports Integration With The Following Technologies :

Your Website

Mobile App

Fatora

Need help?

If you need assistance, please contact our technical support

info@fatora.io

+974 7722 8229

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Download application now

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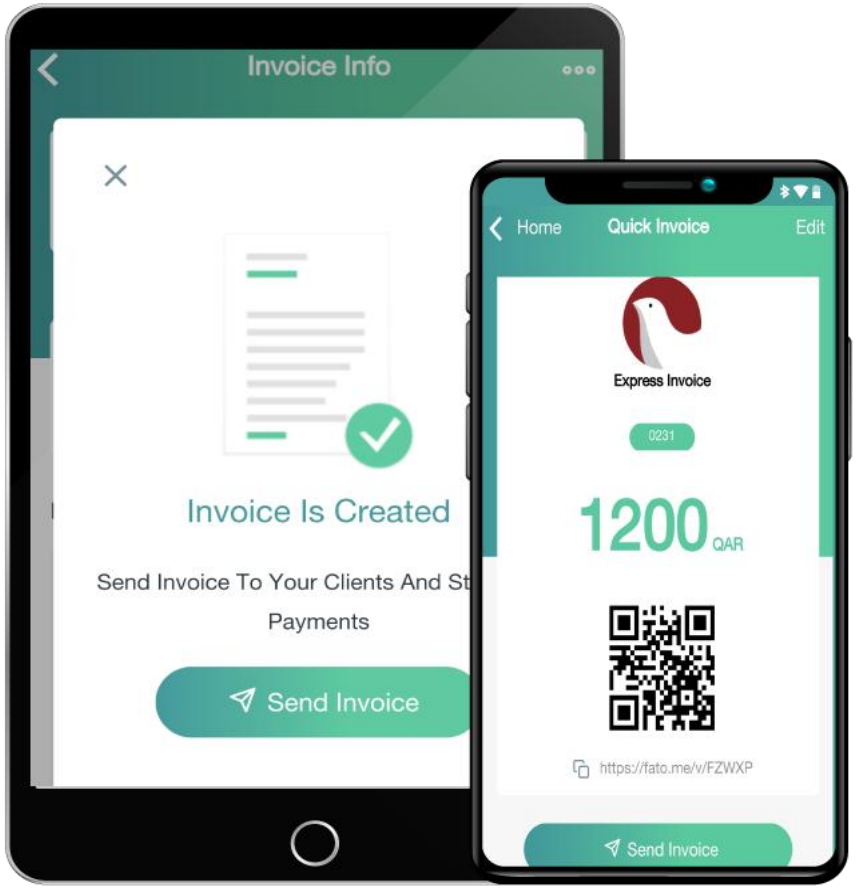
Available on the App Store



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