

# CONFIGURATION

## COMPANY CONFIGURATION - DETAILS

**Company Configuration** refers to the process of setting up and adjusting the system's global parameters to align with the specific needs and work flows of your specific business.

Company configuration is set up during the implementation process, and is not usually amended down the line. Implementation of new functionality post implementation, may require additional configuration.

The options selected are discussed with management and set up according to the company's requirements.

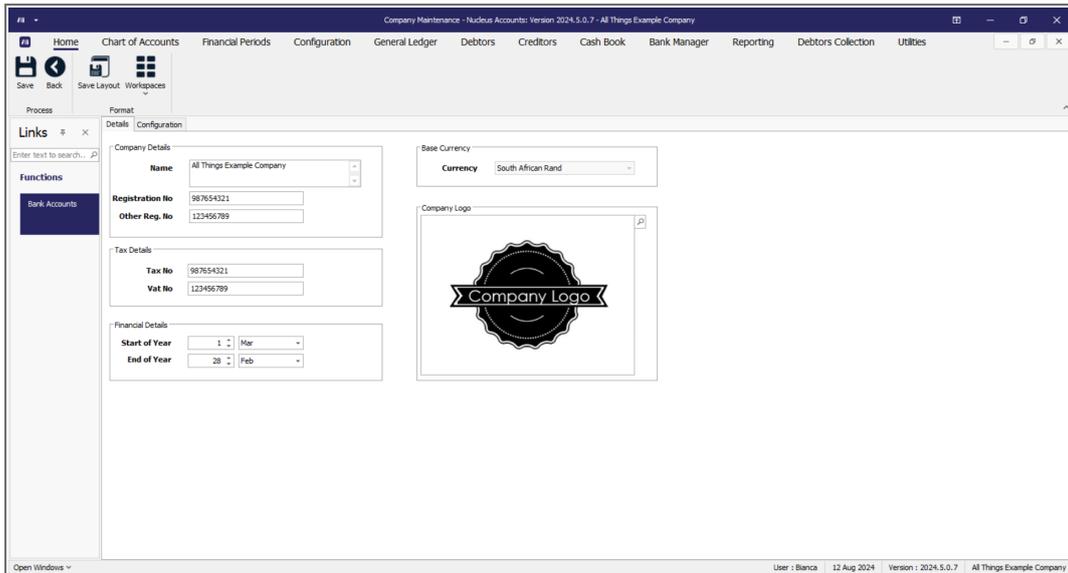
Configuration of Company Details includes **Company Details**, **Tax Details**, **Financial Details**, **Base Currency** and **Company Logo**.

## COMPANY MAINTENANCE SCREEN

### Ribbon Select Configuration - Company



- The **Company Maintenance** maintain screen will be displayed.
- This screen is divided into a **Links** panel, **Details** tab and **Configuration** tab.

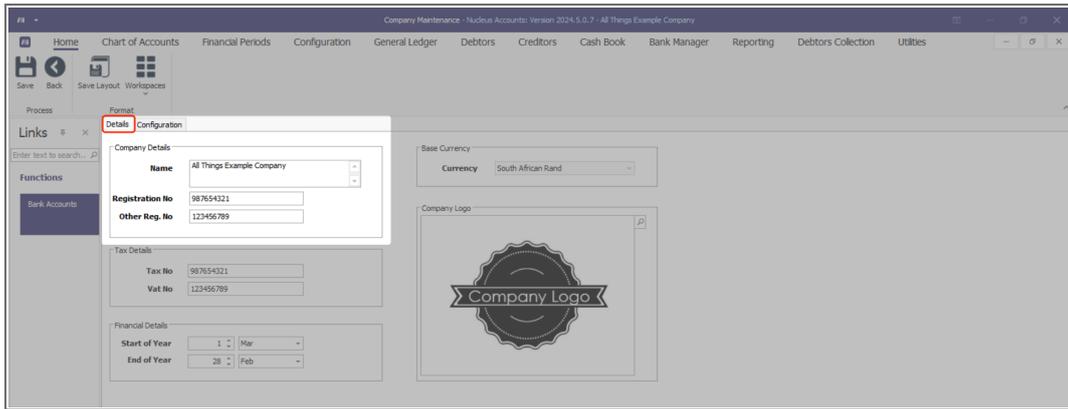


The screenshot displays the 'Company Details' configuration window. The interface includes a top navigation bar with options like 'Home', 'Chart of Accounts', 'Financial Periods', 'Configuration', 'General Ledger', 'Debtors', 'Creditors', 'Cash Book', 'Bank Manager', 'Reporting', 'Debtors Collection', and 'Utilities'. Below this, there are 'Process' and 'Format' tabs. The main area is divided into sections: 'Links' (with a search bar), 'Functions' (with 'Bank Accounts' selected), and 'Configuration'. The 'Configuration' section contains several input fields: 'Company Name' (All Things Example Company), 'Registration No' (987654321), 'Other Reg. No' (123456789), 'Base Currency' (South African Rand), 'Tax No' (987654321), 'Vat No' (123456789), 'Start of Year' (1 Mar), and 'End of Year' (28 Feb). A 'Company Logo' field contains a placeholder image of a seal with the text 'Company Logo'. The bottom status bar shows 'User: Bianca', '12 Aug 2024', 'Version: 2024.5.0.7', and 'All Things Example Company'.

- Select the **Details** tab, if not already selected.

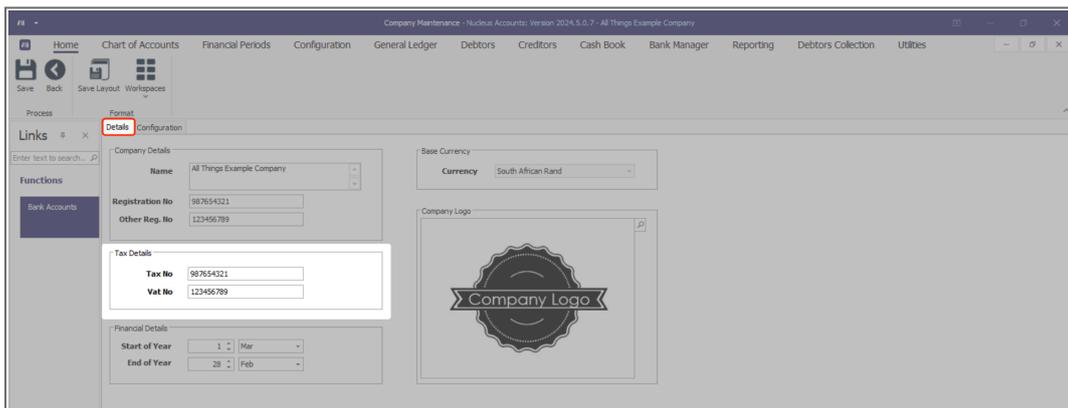
## COMPANY DETAILS

- **Name:** This refers to your company's name and will be displayed on all customer facing documents, such as Tax Invoices. Type in your company name, noting that your company name cannot be longer than 255 characters.
- **Registration No:** is a unique identifier assigned to a company when it is registered with the relevant authorities. Type in your company's registration number.
- **Other Reg. No:** If a secondary or other registration number is required, type this in here, otherwise keep the value as 0.



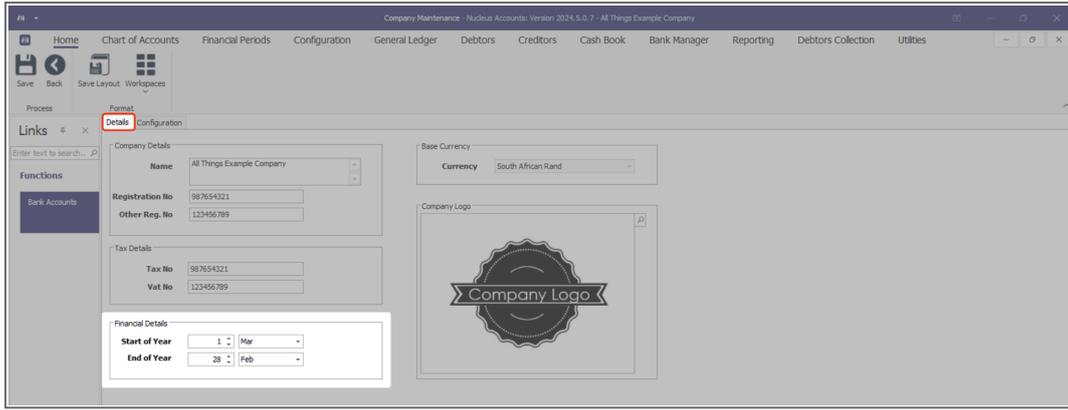
## TAX DETAILS

- **Tax No:** A unique identifier assigned to individuals and entities for tax purposes.
- **Vat No:** A unique identifier assigned to businesses that are registered for Value-Added Tax (VAT).



## FINANCIAL DETAILS

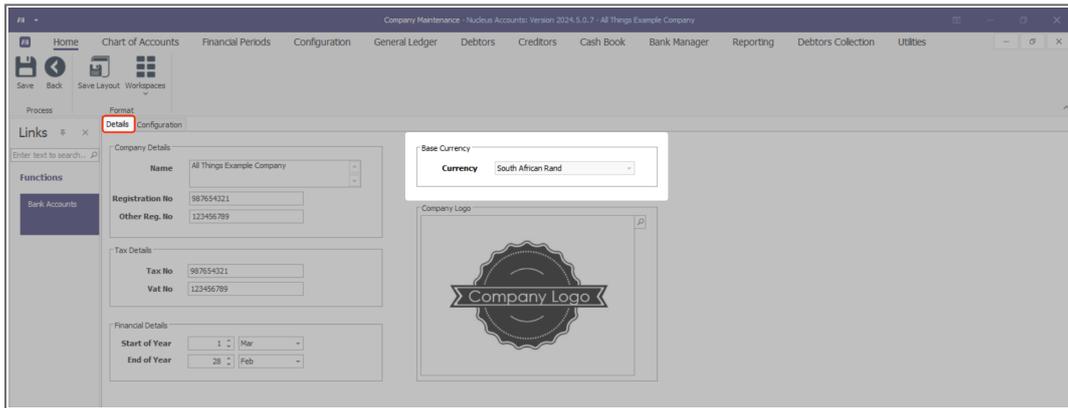
- This configuration indicates the **Start** and **End** of the company's **Financial Year**.
- The start of the **Financial Year** will depend on the company's inception, and is configured during initial company set up within **Nucleus Configurator: [Initial Financial Period Configuration](#)**.



The screenshot shows the 'Company Details' configuration screen. The 'Base Currency' dropdown is highlighted with a red box, showing 'South African Rand' selected. Other fields include Name, Registration No, Other Reg. No, Tax No, Vat No, and Financial Details (Start of Year, End of Year).

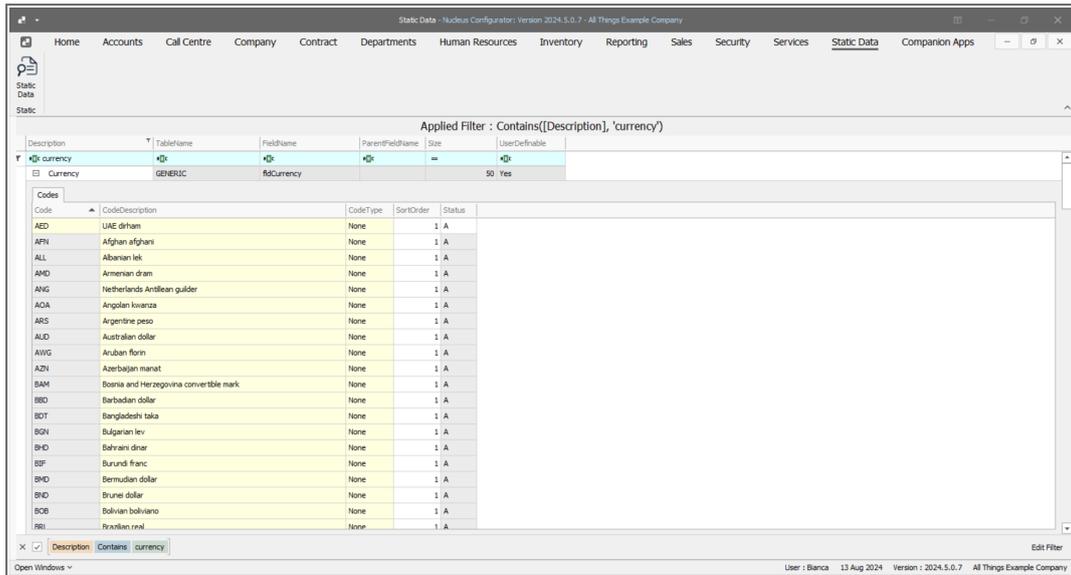
## BASE CURRENCY

- **Base Currency:** This is the Currency used in the country that the company operates. Select the currency from the drop down. Note that once the currency is configured, it cannot be changed.



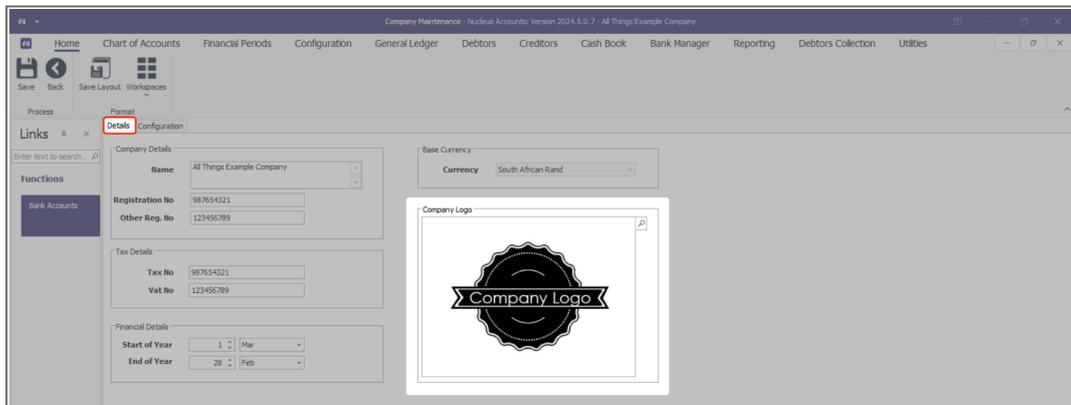
This screenshot is identical to the one above, showing the 'Company Details' configuration screen with the 'Base Currency' dropdown highlighted.

- These currency codes are set up in [Nucleus Configurator](#) > Static Data module.

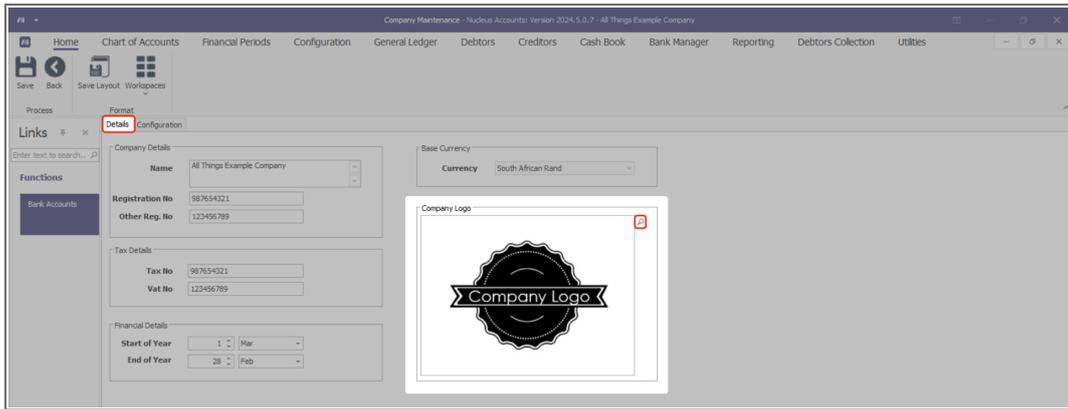


## COMPANY LOGO

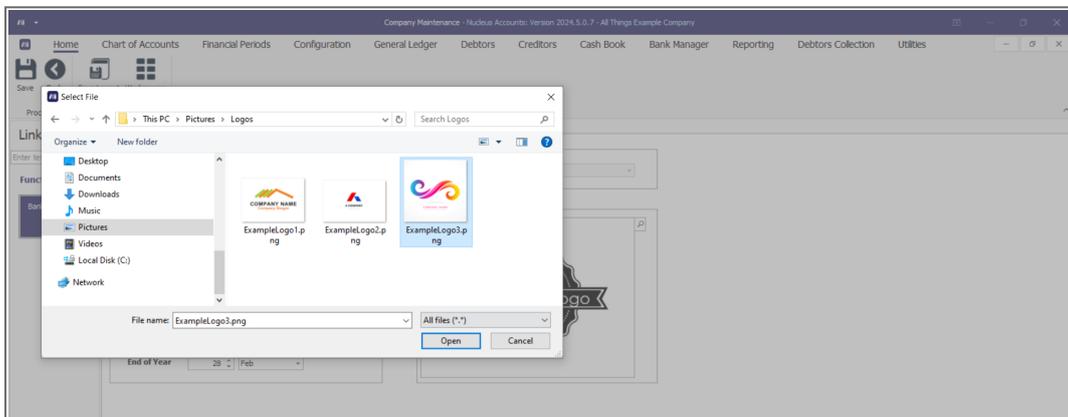
- The **Company Logo** is used on most of the transactional report layouts, e.g. Purchase Order, Sales Invoice, etc. For reports where they logo has not been included to save space, but you would like to include your logo - refer to Customizing Report Layouts.



- Click on the **Search** button.



- This will open the **Windows Explorer** browser to **Select File**.
- Search for and **select** your Logo, then click on the **Open** button.



- This will populate the logo in the Company Logo image field.

Company Maintenance - Nucleus Accounts: Version 2024.5.0.7 - All Things Example Company

Home | Chart of Accounts | Financial Periods | Configuration | General Ledger | Debtors | Creditors | Cash Book | Bank Manager | Reporting | Debtors Collection | Utilities

Save | Back | Save Layout | Workspaces

Process | Format

Links

Enter text to search...

Functions

Bank Accounts

Company Details

Name: All Things Example Company

Registration No: 987654321

Other Reg. No: 123456789

Base Currency

Currency: South African Rand

Tax Details

Tax No: 987654321

Vat No: 123456789

Financial Details

Start of Year: 1 | Mar

End of Year: 28 | Feb

Company Logo

COMPANY NAME

Open Windows | User: Bianca | 13 Aug 2024 | Version: 2024.5.0.7 | All Things Example Company

- Click on the **Save** button or continue on to [Configuration Flags](#).

## Related Topics

- [Introduction to Company Configuration](#)
- [Company Details](#)
- [Configuration Flags](#)
- [Additional Configuration](#)
- [Bank Accounts](#)

ACCT.CNFG.COMP.Details

