

ShopForge

Admin Manual v2.0.0

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Sign in and manage your session

Signing in opens the ShopForge Backoffice. Only staff accounts (`admin` and `employee` roles) can get in — customer accounts do not have backoffice access. After a successful sign-in the app keeps you signed in across restarts, so you normally sign in only once.

Which app to open

Each environment is its own app, so several can be installed side by side on one computer and none replaces another. The shop's real back office is named **ShopForge Backoffice**. The test copies carry their environment in the name: **ShopForge Backoffice (Dev)**, **ShopForge Backoffice (INT)** and **ShopForge Backoffice (Staging)**. For the shop's daily work, open the one with no brackets. The version badge at the foot of the left-hand menu confirms it: it reads `PROD` and has no coloured dot (see Getting help).

Each app keeps its own data on the computer, so each one asks for the shop code at its own first launch (below).

First launch

The first time ShopForge Backoffice starts on a computer, it does not yet know which shop it belongs to, so it opens one screen only: **Enter your shop code**.

1. Type the shop code your shop's administrator gave you (administrators: see Set the shop code). Capital letters do not matter, and spaces before or after the code are ignored.
2. Click **Activate**.

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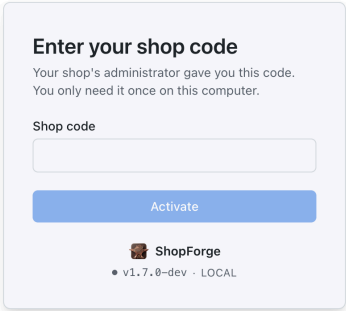
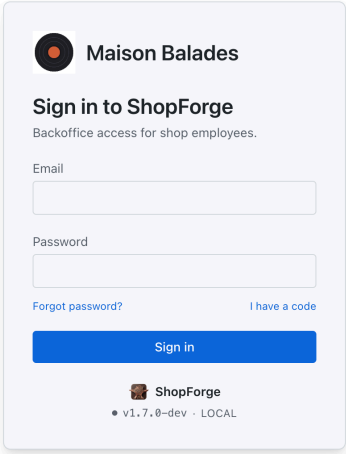


The app then shows the sign-in screen with your shop's logo and name, and the **Tenant** field is gone: the shop is fixed for this computer. You enter the code once per computer. It is the same code for every computer of the shop, and it only tells the app which shop to show — you still sign in with your own e-mail and password.



If your administrator sent you an onboarding link, opening it with the app installed starts the app on this screen with the code already filled in. Click **Activate** yourself: the link never activates by itself.

Activating needs an internet connection, once. After that the sign-in screen, with the logo, appears even without a connection. When the shop changes its name, tagline or logo, this computer picks the change up the next time someone signs in.

The first time someone signs in on a computer, the app downloads your shop data to it. The window is blurred behind a card with a progress bar while it does (the download depends on your connection, then about 15 seconds of installation), and then opens. A connection is needed this once; see While your shop data downloads.

Set the shop code

Administrators choose the code that staff type on first launch. Employees do not see this section.

1. Open **Configure**, then the **Legal identity** tab, and scroll to **Shop code** below the identity.
2. Type the **Code**: 8 to 32 letters, digits or hyphens. **Suggest a code** fills in a word and four digits that you can keep or change. The app keeps the code in lowercase.
3. Optionally fill in the **Tagline**: it is shown on the sign-in screen.
4. Click **Save**. The app confirms "Shop code saved. The old code no longer works."

The code selects your shop; it is not a password. If the code is already in use by another shop, or is a reserved word, the app says "This code is already in use." and keeps what you typed: choose another one.

To remove the code, click **Clear the code** and confirm. Computers already set up keep working; a new computer can no longer be set up until you save a new code.

Sign in

1. Launch ShopForge Backoffice.
2. Fill in the fields:
   - **Tenant** — your shop's short identifier (e.g. `vinyl-haven`). On a computer activated with a shop code (see First launch), this field is hidden and replaced by your shop's name and logo.
   - **E-mail** — the e-mail your staff account was created with.
   - **Password**.
3. Click **Sign in**. The button reads "Signing in..." while the request is in flight.

On success you land on the Dashboard.

After five wrong passwords for an account in 15 minutes, ShopForge refuses its sign-in, even with the right password, until the time shown ("Too many failed sign-in attempts. Try again after 11:45.").

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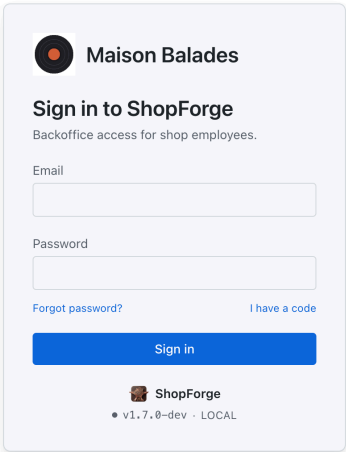
Under the password field are two links: **Forgot password?** and **I have a code**. They lead to the two screens below. They need a connection, like the sign-in itself, and they use your shop: you never type it again.



Sign in offline

When ShopForge can't be reached, or the computer has no network, the sign-in screen also offers **Sign in offline**. You sign in with your PIN, checked on this computer, and the till works as in any offline time (see Offline & synchronization).

1. Click **Sign in offline**.
2. Under "Choose your name", pick yourself in the list of this shop's staff. Only staff with a PIN are listed: "Not in the list? Only staff with a PIN can sign in offline (user menu → My PIN)." Set yours in advance, online (see My PIN). You don't need to have signed in on this computer before.
3. Type your six-digit PIN. There is no button: the sixth digit signs you in.

You land on the dashboard, signed in as yourself, and the header reads **Offline**. Everything you record carries your name. Nothing is sent to ShopForge until the connection is back.

A wrong PIN says "Wrong PIN. Attempts left: 2." Three wrong PINs in a row block your PIN and password for **five minutes**, here, on the lock screen and for manager approvals: "Too many failed attempts: your PIN and password are blocked until 11:45."

Other messages:

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- "This computer has no data for this shop yet: connect to the network to sign in." — this computer has never downloaded the shop's data, so it doesn't know its staff. Connect once and sign in with your password.
- "The staff list couldn't be read on this computer. Try again." — click **Sign in offline** again.
- "The PIN couldn't be checked on this computer. Try again." — the check didn't run; it doesn't count as a wrong attempt. Type your PIN again.

Back online

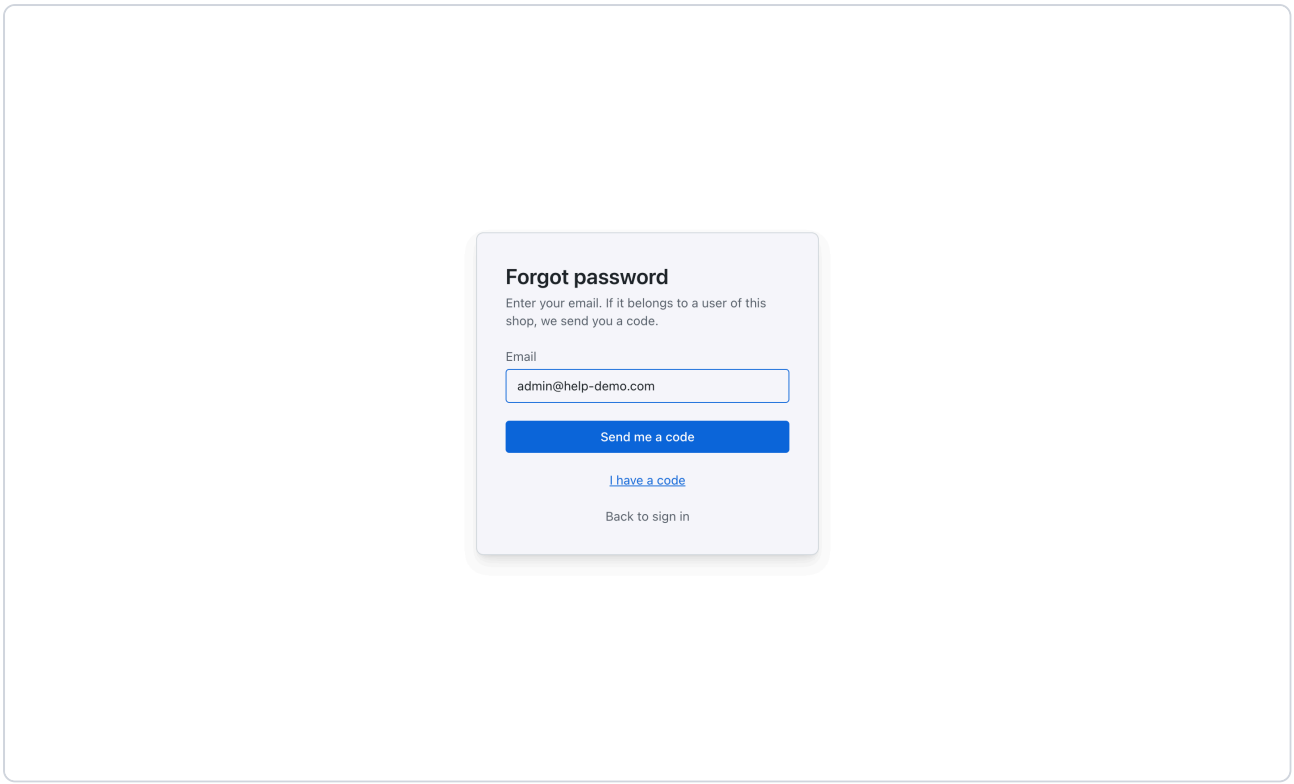
When ShopForge answers again:

- **If you are the person whose session this computer kept** (the last person who signed in with a password here), your session resumes without a word and your sales are sent.
- **Otherwise, your sales wait for your password.** If a sale is open (items in the basket, or a payment under way), finish it. A banner says "You're back online. Finish this sale, then enter your password to send your sales."
- **Once no sale is open,** a window covers the back office: "Enter your password to go on" — "You're back online. The sales made offline wait for your password to be sent. Until then, no new sale can start." Your email is filled in. Type your **Password** and click **Sign in**: the window closes, your sales are sent and the header leaves **Offline**. A wrong password shows the sign-in screen's own message.
- **Someone else takes over?** Click **Log out**, and they sign in with their own account. The sales made offline stay on this computer and are sent with the next sign-in.

If the connection drops again before the password, the window closes and you go on selling offline. It comes back with the connection.

Forgot your password

1. On the sign-in screen, click **Forgot password?**. The **E-mail** field is already filled if you had typed it.
2. Click **Send me a code**. You see "If this address belongs to a user of this shop, a code was sent. It is valid for 30 minutes." The message is the same whether or not the address is a user of the shop.
3. Open the e-mail and go on with You received a code.



The code works once, and it replaces any earlier code you were sent. It is not sent to a customer account: customers reset their password on the shop's website.

You received a code

You receive a code in two cases: when an administrator creates your account (the welcome e-mail, valid 7 days), and when you ask for one with **Forgot password?** (valid 30 minutes). In both, the same screen sets your password:

1. On the sign-in screen, click **I have a code** (or arrive here from **Forgot password?**).
2. Check the **E-mail**, type the **Code** as it is written in the e-mail (`K7QM–4TXP`; capitals and the dash do not matter), then the **New password** and **Confirm new password**. The hint under the field gives the rules, and anything missing is listed in red.
3. Click **Set password**. You return to the sign-in with "Password changed. You can sign in." Sign in with the new password.

You are signed out of every other session, on this computer and on the registers. If you see "This code is not valid or has expired. Ask for a new one.", the code was mistyped, already used, replaced by a newer one, or too old: a code stops working after five wrong tries. Ask for a new one with **Forgot password?**, or ask an administrator to send you a new code.

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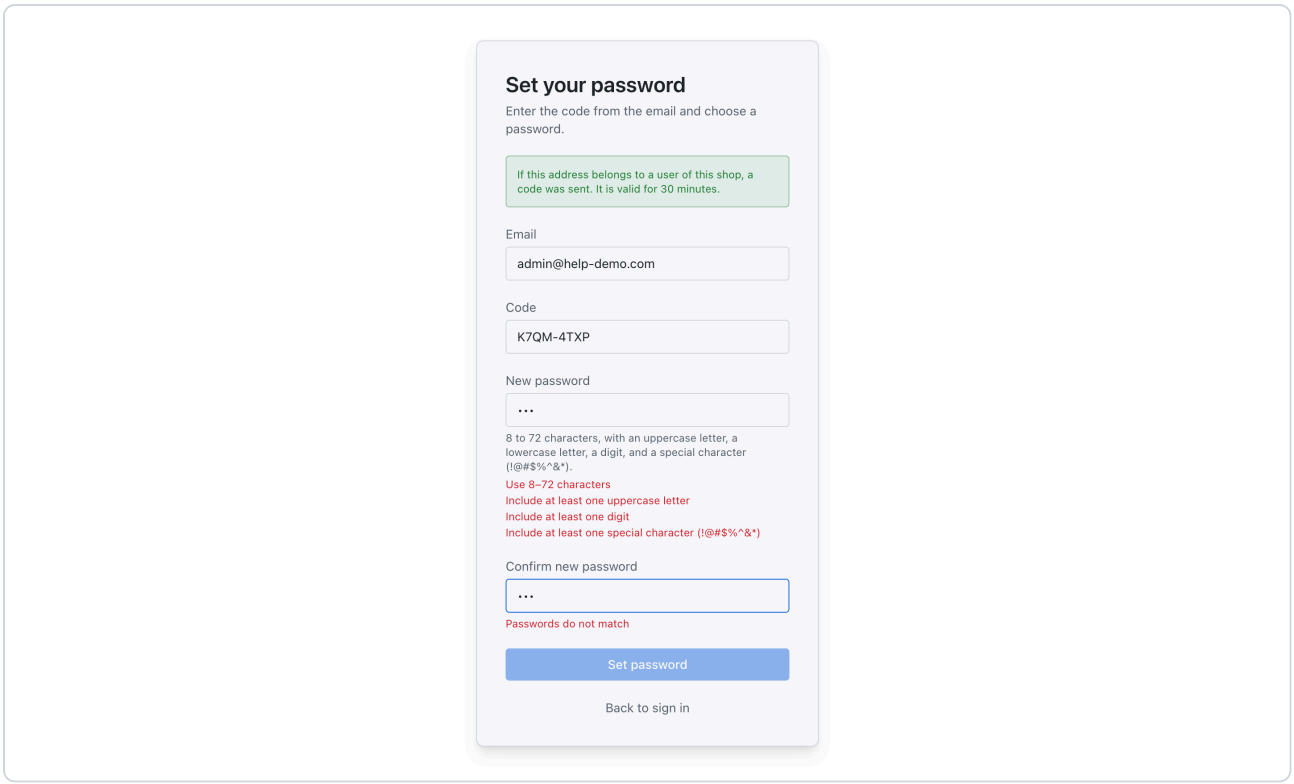

Session resume

Closing the app does not sign you out. On your next launch — within a 7-day window — the app restores your session automatically and takes you straight to the dashboard. Your password and tokens stay in the operating system's encrypted keychain; nothing is stored on disk in plaintext.

A dropped connection never signs you out: the app keeps your session and works offline. When the service itself no longer accepts your sign-in, the app brings you back to the login screen with the notice "Your session expired. Please sign in again."

A computer that restarts offline more than 15 minutes after its last sign-in signs nobody in: use Sign in offline.

My profile

From the user menu (your avatar in the top-right corner), choose **My profile** to view and edit your account details. You can change your first name, last name and e-mail address here. You can also switch your newsletter subscription on or off and manage your saved delivery addresses. If you're an administrator, this is also where your own store credit balance live. Click **Save** to apply your changes.

Change your password

From the user menu, go to **Change password** and change your password. You are then signed out and brought back to the login screen with the notice "Password changed — sign in with your

new password."

Sign out

Use **Log out** at the bottom of the user menu. Signing out ends the session: your stored credentials are wiped from this computer, so the next person on the machine starts from the login screen.

Switch user

Several people can share one register during a shift and hand it over without logging out. Open the user menu and choose **Switch user**, between **Lock screen** and **Log out**. It is disabled, with "Not while a payment is in progress.", while a sale is being signed or a PayPal QR code is open.

Only the signed-in person changes. The open screen, the basket, the cash session and the data on this computer stay as they are, and nothing is downloaded again. The window lists the other staff. Pick the person who takes over, then:

- **Online, an employee who has a PIN** types their six-digit PIN. There is no button: the sixth digit sends it. The server checks it, which takes a few seconds.
- **Online, an administrator or a person with no PIN** types their password (the list says "Password only" for someone with no PIN, and "An administrator signs in with their password when the computer is online."). Anyone with a PIN can also choose **Use password instead**.
- **Offline,** everyone types their PIN, checked on this computer: "Offline: {name} signs in with their PIN. Their password is asked once the connection is back." A person with no PIN is greyed, "Needs a connection". When the connection is back, the new person enters their password once, as after any offline sign-in (see Back online).

Before an online switch, the sales the previous person made are sent first, so nothing of theirs is left behind. If they can't be sent yet, the switch waits: "Some sales could not be sent to the server yet. Try again in a moment." A toast says "Signed in as {name}." and the screen stays where it was; if the new person's role can't see that screen, they land on the dashboard. A basket in progress goes on with the new person, and the sale is signed with their name.

A wrong PIN or password says "Wrong PIN. Attempts left: 2." and changes nothing: the previous person stays signed in. Three wrong entries for the same person block that person for **five minutes** here, on the lock screen and for manager approvals: "Too many failed attempts for {name}: switching to them is blocked until 11:45." The other people in the list stay open.

Lock the screen

The back office locks its screen when nobody has used it for a while, and you can lock it yourself. Locking is not signing out: the open screen, a form you were filling, a sale in progress at

the till and the sync all stay as they were behind the lock, and unlocking brings you back to exactly where you were.

- **By itself.** After the delay your administrator sets in Configure → System → Screen lock (15 minutes unless they changed it, or Off) with no key, click, touch or scroll in any ShopForge window. One clock covers every window of the computer, and a lock covers all of them.
- **At once.** Open the user menu and choose **Lock screen**, above **Switch user** and **Log out**.
- **At the till.** A payment-terminal step in progress is not interrupted: the lock shows when it ends.
- **Restarts.** If the app is closed or crashes while locked, it opens locked. The same goes when it can no longer read its own lock state.

The locked screen shows your name, "Screen locked · Locked at 14:20", and asks for your PIN. Nothing behind it can be read or clicked.

Unlock the screen

There are three ways in, and **Log out** is always there.

1. **Your PIN.** Type your six digits. There is no button: the sixth digit unlocks. It works offline. On a touch screen a digit pad appears under the boxes. Set it in the user menu → **My PIN** (see My PIN).
2. **Your password.** Choose **Use password instead**, type it and click **Unlock**. The server checks it, so it needs a connection: offline, the link stays but is greyed, with "A password needs a connection." under it. If you have no PIN and the computer is online, the password form is shown at once, with "Set a PIN in your user menu (My PIN) to unlock faster, also offline."
3. **An administrator.** Choose **Unlock as administrator** (administrators don't see it: their own PIN or password unlocks; nor does it show while your own PIN is blocked). Pick an administrator from the list and enter their PIN, which also works offline, or their password. An administrator with no PIN shows "Password only" and, offline, is greyed with "Needs a connection". The session stays yours; **Back** returns to your own PIN. The unlock is recorded in the audit log with the administrator, you, the computer and the time. Made offline, the entry is kept on the computer and reaches the audit log at the next sync. Unlocking with your own PIN or password is not recorded.

If you have no PIN and the computer is offline, the screen says "You have no PIN, and a password needs a connection. Ask an administrator to unlock, or log out."

Two other messages can appear when you unlock with a password. "The server couldn't check the password. Try again." means the password was not judged right or wrong: the computer is online but the server could not be asked, or did not answer. Try again, and if it keeps happening use your PIN or ask an administrator. "Unlocking isn't possible right now. Try again in a moment."

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means the check could not start (another check is still running, or the app is not ready yet): wait a moment and try again. Neither counts as a wrong attempt.

Wrong attempts

A wrong entry says "Wrong PIN. Attempts left: 2." (or "Wrong password."). The count is kept for the person whose PIN or password was tried: you, or the administrator you picked. Three failures in a row block that person's PIN and password for **five minutes**.

- **Your own block.** Everything is disabled except **Log out**, and the links to your password and to an administrator are hidden: "Too many failed attempts: your PIN and password are blocked until 14:35."
- **An administrator's block.** That administrator's PIN and password are refused, on this computer and in manager approvals on the registers, for the same five minutes: "Too many failed attempts for Anne Admin: their PIN and password are blocked until 14:35, here and for manager approvals." Your own PIN or password still unlocks.

The count is the one the manager approvals use, so a wrong PIN on the lock screen counts towards that person's approvals, and the other way round. An employee's count also blocks their own approval of a refund, a cancellation or a manual discount. Only that person's right entry clears it: your own right entry does not clear an administrator's count, and logging out clears neither. Restarting the app does not clear it either. An administrator's third failure is recorded in the JET Journal, as a locked approval is; an employee's block is not recorded.

Forget this shop

Administrators can point a computer at another shop. From the user menu, choose **Forget this shop**. The item is shown only to administrators, and only on a computer that was activated with a shop code.

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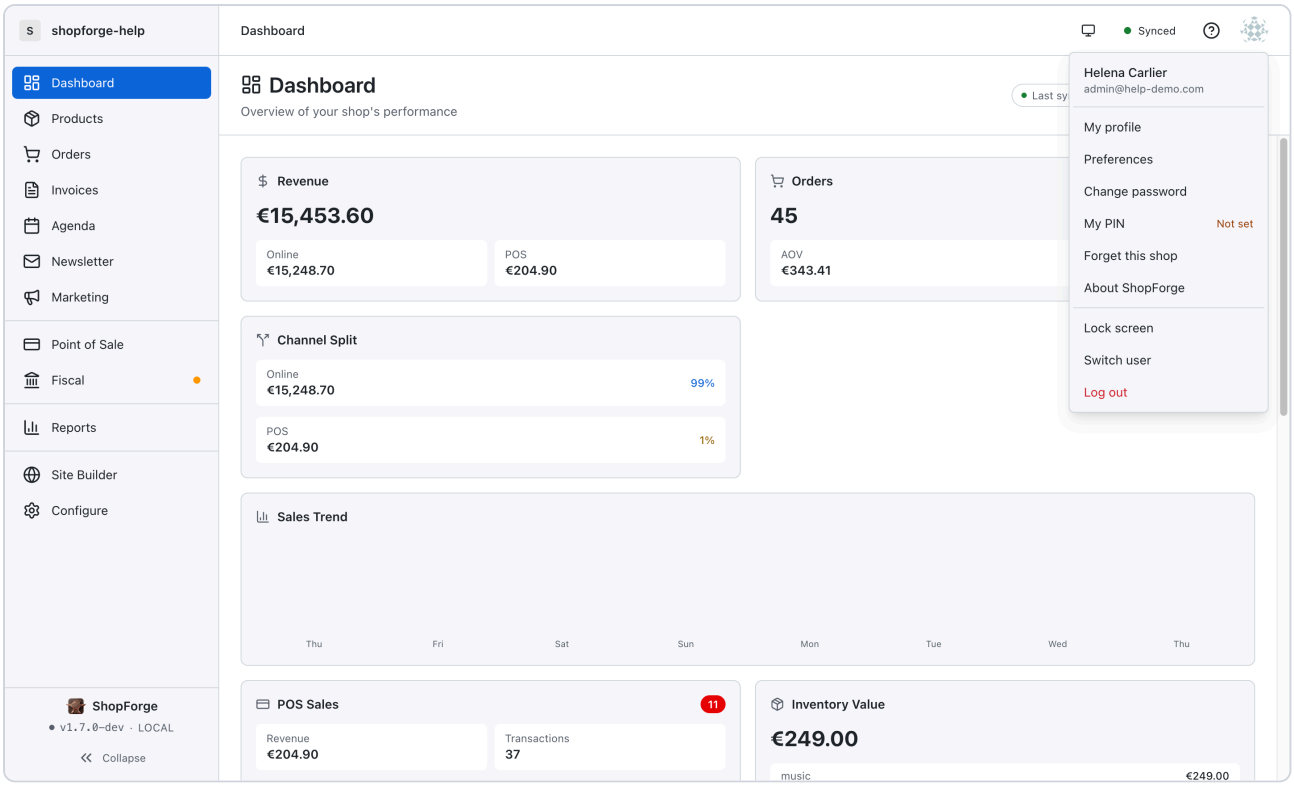
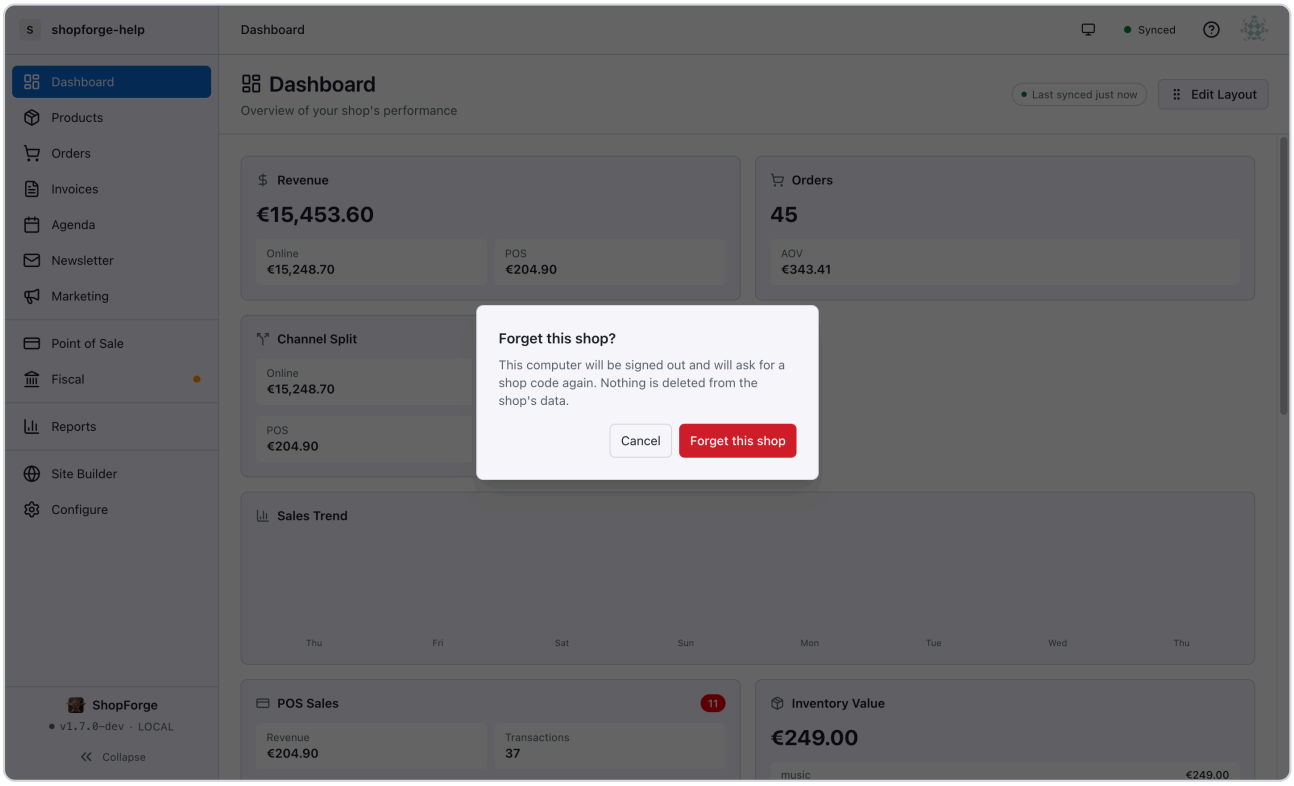


- If records on this computer have not reached the server yet, the app refuses and says how many: "This shop cannot be forgotten yet: 3 records are not yet sent to the server. Wait for the connection, then try again." Nothing is deleted.
- Otherwise the app asks you to confirm: "Forget this shop?". On confirmation it signs you out, deletes the shop code activation and the stored logo from this computer, and returns to the **Enter your shop code** screen.



Nothing is deleted from the shop's data on the server. The shop's data already on this computer stays in its own folder, and another shop does not read it. Employees do not see this item.

Troubleshooting

- **"This code is not valid."** — On the shop code screen: the code is mistyped, or your administrator changed or removed it. Ask your administrator for the current code. The field keeps what you typed.
- **"Too many attempts. Try again in a few minutes."** — Too many codes were tried from this network. Wait a few minutes and try again.
- **"Connect to the internet to activate this app."** — Activation needs a connection once. Connect and click **Activate** again.
- **"Sign-in failed. Check your tenant, email, and password."** — Invalid credentials. Check the tenant spelling (lowercase letters, digits, hyphens).
- **"Cannot reach ShopForge. Check your internet connection and try again."** — The app could not reach the service. Check your network and retry.
- **"Sign-in service is temporarily unavailable. Please try again."** — The service is experiencing problems; retry shortly.
- **"This account does not have backoffice access."** — The signed-in role is `customer`, or the account is not active (for example an invitation not yet accepted); backoffice is for active staff only. Ask an administrator to adjust the role or the account.
- **"This account belongs to another shop. Sign in with an account of this shop."** — The account belongs to a different shop from the one this register is set up for. Sign in with an account of this shop.
- **Yellow banner: "Credentials cannot be saved on this system; you will need to sign in again after closing the app."** — The operating-system keychain is not available (typical on some headless Linux installs), so credentials cannot be persisted. You will need to sign in again after every app restart.
- **"Password changed" banner after sign-in** — expected: you were signed out as part of a password change. Sign in with the new password.
- **"This code is not valid or has expired. Ask for a new one."** — On the code screen: see You received a code.

Related

- Preferences & locale — theme, language, date format and timezone in detail.
- Offline & synchronization — how ShopForge keeps working without a connection.
- Dashboard

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Offline & synchronization

ShopForge is built **offline-first**: the app keeps a local, encrypted copy of your shop data on this device and works from it. You can process orders, edit and browse with no internet at all; synchronization simply keeps the local copy in step with the server.

How it works

1. **Snapshot** — the first time the app opens (or when the local copy is older than ~24 h) it downloads a full snapshot of your shop data.
2. **Delta sync** — every ~60 seconds the app asks the server *what changed since last time* and applies it locally in one shot.
3. **Outbox (your changes)** — everything you create, edit or sell is written to the local database **first** and queued. A background worker pushes the queue to the server, immediately when possible and on a short retry loop when not.

The result: connection drops are invisible. Sales ring up, edits apply, and everything is pushed to the server automatically once the connection is back — in order, and signed where fiscal rules require it.

While your shop data downloads

When the app has to download your shop data (the first time it opens on a computer, after a reset, or when the local copy is too old), the whole window is **blurred** behind one card, and nothing behind it can be used until the data is ready:

- **Preparing the shop's data on the server…** — only when the server has no copy of your data ready yet (for example just after a reset). The bar fills over the time the server usually takes, up to 25 %; without a usual time it just keeps moving.
- **Downloading the shop's data…** — the bar fills as the data arrives, from 25 % to 80 %. If the size is not known in advance, the card shows how much has arrived (for example "38 MB") and no percentage.
- **Installing the shop's data…** — the bar goes from 80 % to 100 % over about 15 seconds, and waits at 99 % if the installation takes longer. The window opens when the bar reaches 100 %, even if the data was installed sooner.

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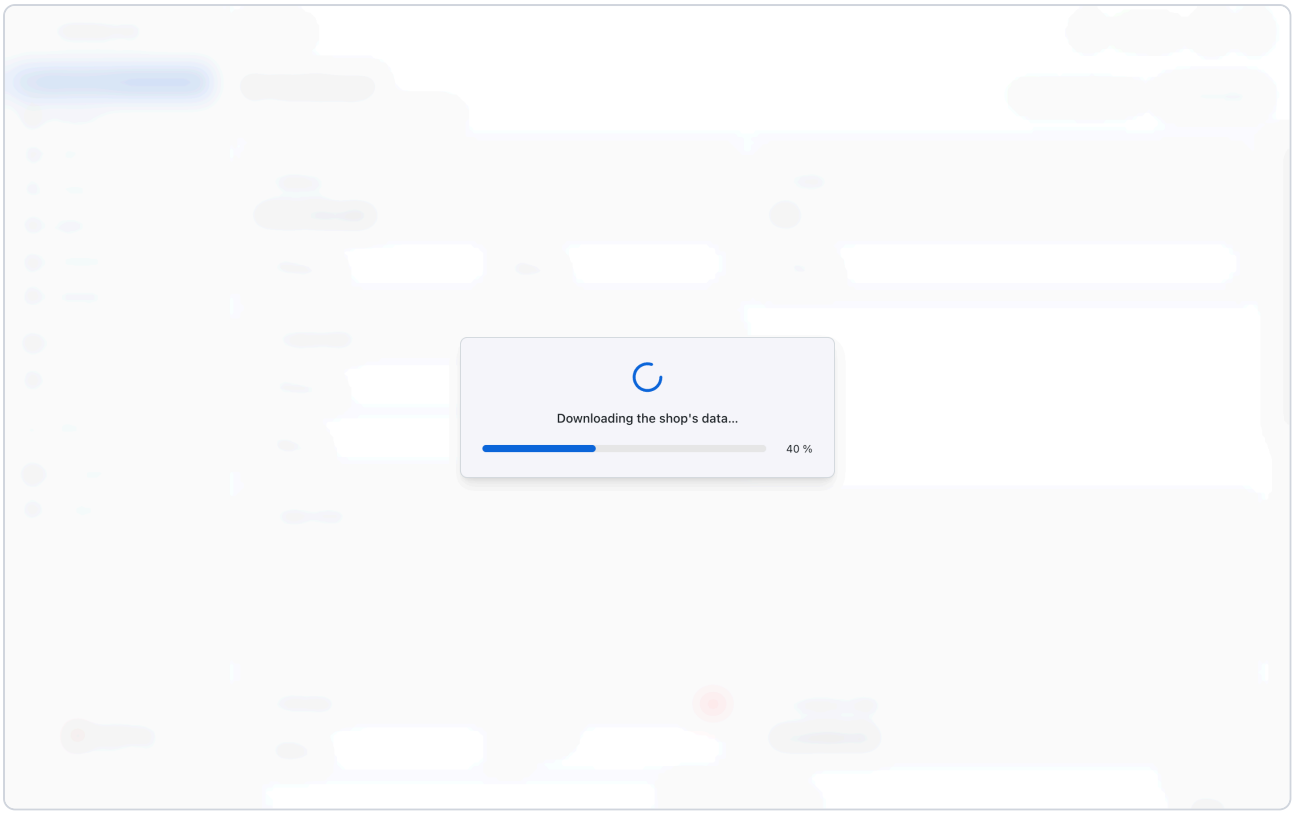

A newer copy of your data that the app downloads in the background while you work does not blur anything: only its installation does, at a quiet moment (no unsaved editor, no sale in progress).

If something goes wrong, the card says what: **The shop's data could not be downloaded** or **The shop's data could not be installed**, followed by the reason (for example "the server could not be reached"). Click **Retry** to start again at once. If this computer already holds an older copy of your data (for example you start it in the morning without a connection), the card also offers **Continue with the data on this computer**: the app opens on the older copy, and the sync indicator reads **Data from** and the date of that copy until a download succeeds. Without an older copy there is nothing to open yet, so only **Retry** is offered.

The sync indicator

The dot + label in the top-right of the window shows inbound sync state:

Dot	Label	Meaning
Green	Synced	Local copy is up to date.
Amber	Syncing…	A sync or drain is running right now.
Grey	Offline	No network — you are on your local copy.
Red	Sync error	Something failed; click to investigate.

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Dot	Label	Meaning
Red	Not all sent	Some records could not go out; click to see why and who can act.

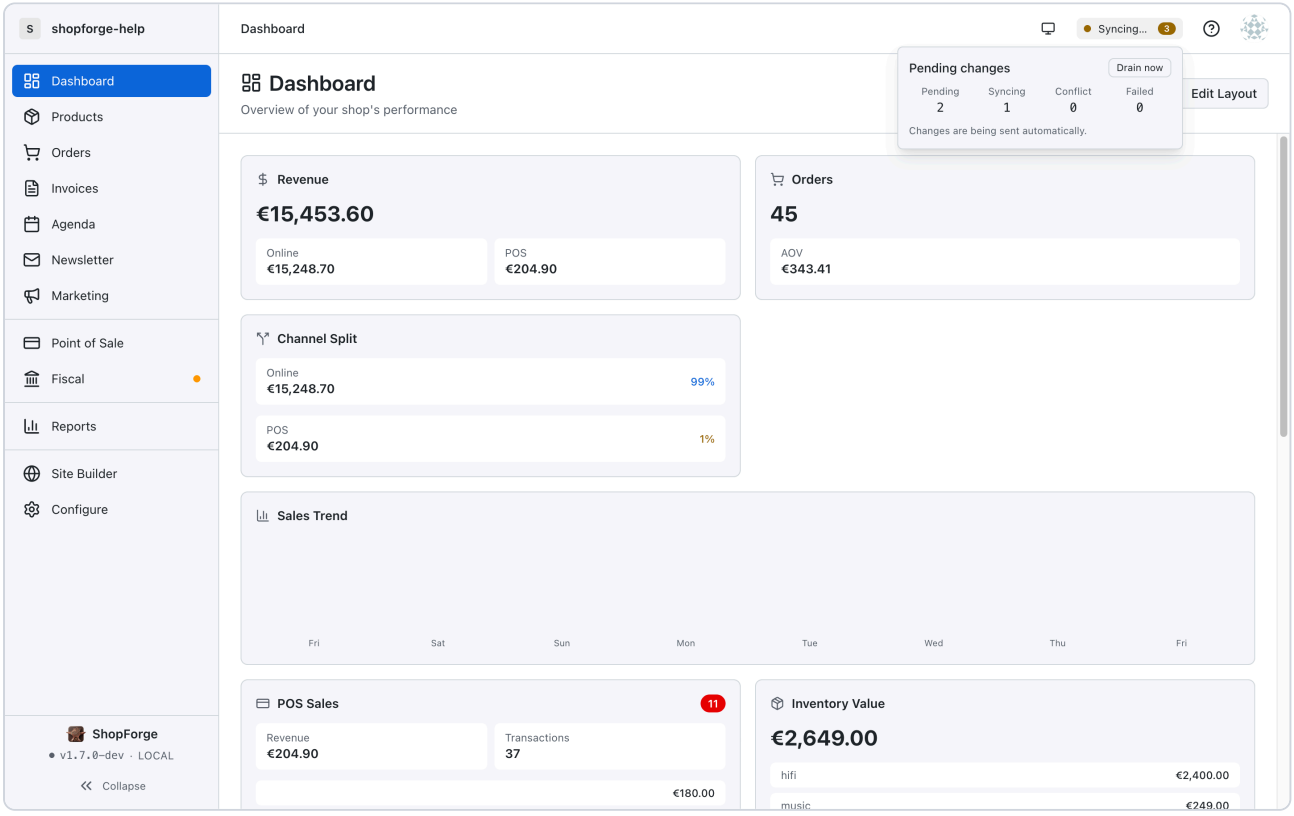
Next to the dot, a small badge shows how many of your **local changes are still waiting to sync**. A red badge (instead of amber) means some changes are stuck in **conflict** or **failed** and need attention.

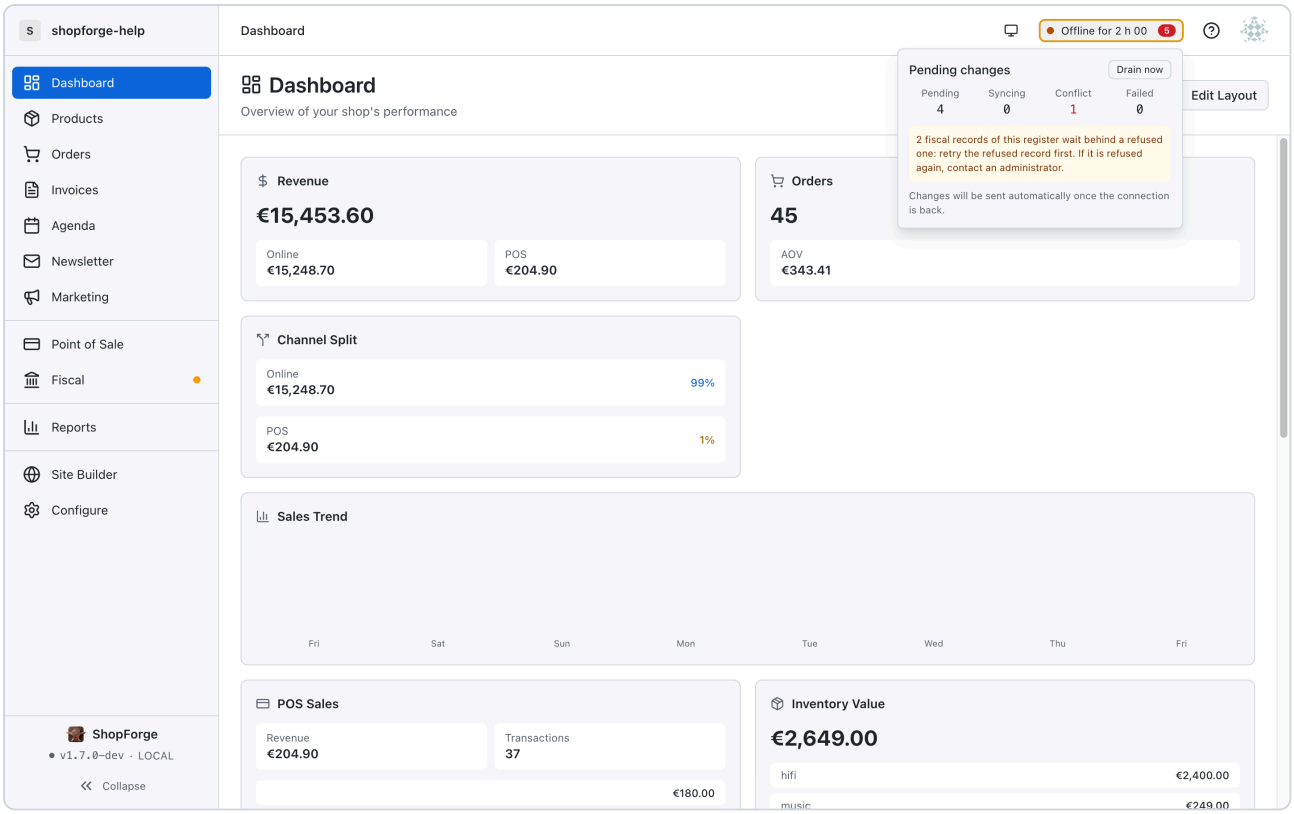
Pending changes

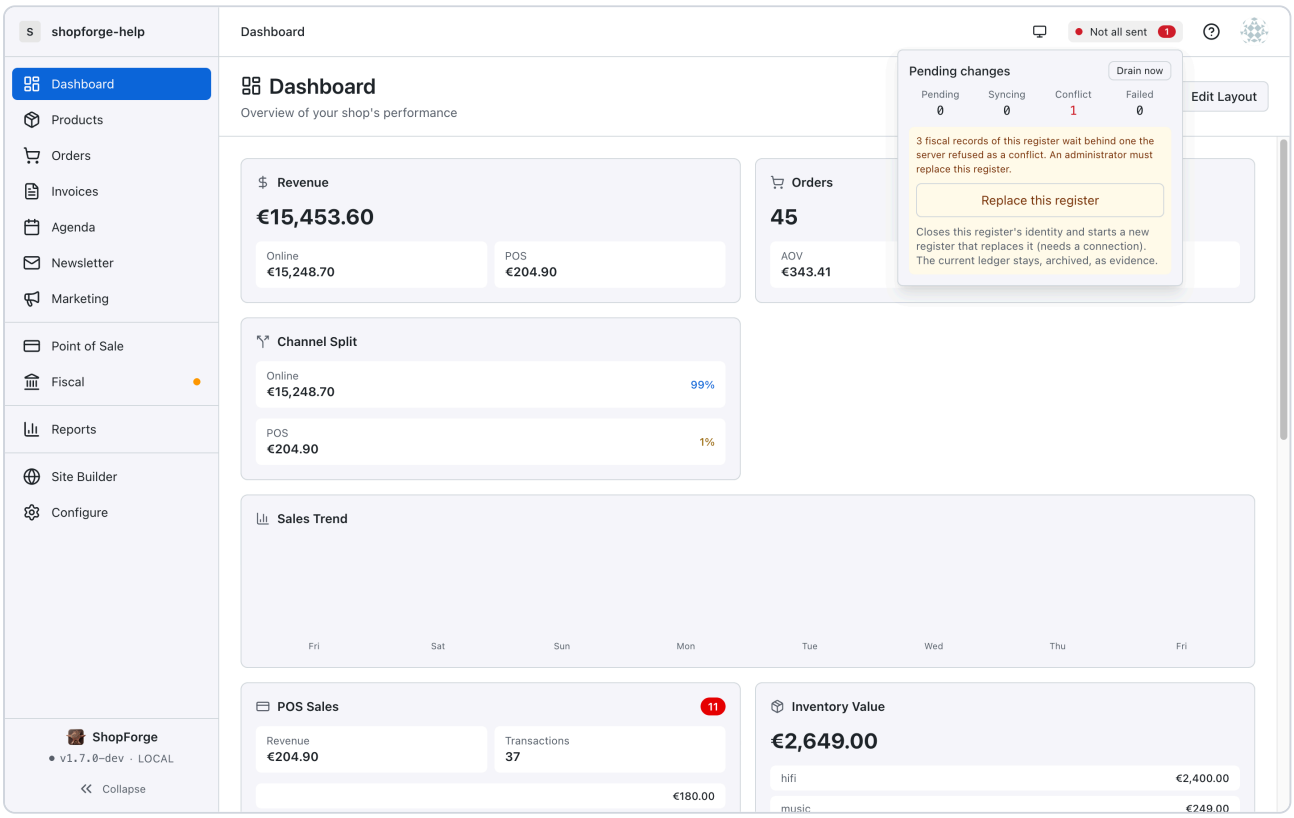
The **outbox** holds your local changes until they reach the server. Click the indicator to open the summary popover:

- **Pending / Syncing / Conflict / Failed** counts of your queued changes.
- **Drain now** — push everything to the server immediately.
- A **conflict** means another device (or the server) changed the same record while yours was queued — e.g. two registers editing the same order. The stuck rows are listed with the error; refresh and re-apply to move forward.
- **Retry N failed mutations** — re-send stuck changes once the connection is healthy.

Changes are sent automatically: at once when the register is online, or once the connection is back. You usually do not need to touch this screen. When the indicator says **Not all sent**, some records are held: the summary says why, and who can act.







The sales of someone who signed in offline with their PIN wait for their password once the connection is back (see Back online).

Reset the local database

Last resort when the local database itself cannot be opened (a corrupted or incompatible file — surfaced as "Local database unreadable" in the error popover). Confirming **replaces the local copy of your shop data on this device with a fresh copy from the server**. Local changes that had **not synced yet — for example a sale rung up while offline — are not in the new copy.** The old file is not deleted: it is set aside in the application's data folder, renamed with the date and time, so support can still recover those records. This cannot be undone from the app.

What requires a connection

Almost everything works offline. The exceptions are marked in the app:

- **Online payment** viewing, reconciling and refunding (Orders).
- The **Site Builder** and the **newsletter editor** refuse to open offline ("This module requires an internet connection.").

Closing the day works offline: in the **End of day** tab, the **Z report** is signed on the register and the server checks it when the connection is back (see Working offline).

Related

- Sign in and manage your session
- Dashboard — reading data freshness at a glance
- Point of sale — offline selling and the daily close

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Preferences & locale

Your **Preferences** control the backoffice's look and how dates and times are shown to you. They are per-device choices: they apply to the computer you are using right now, not to your account on every machine.

Open your preferences

Open the user menu (your name in the top-right corner) and choose **Preferences**. The dialog has two areas:

- **Theme** — three choices: **System**, **Light** and **Dark**. **System** follows the operating system's setting; **Light** and **Dark** force the appearance. The backoffice applies your choice immediately and remembers it on this device.
- **Locale & Language** — your personal locale overrides, described below.

Language, date format and timezone

Each selector offers **Use tenant default** (shown in italics) plus concrete options:

- **Language** — English or Français. Switching reloads the backoffice in that language.
- **Date format** — the presets: ISO (2026-05-19), EU short (19/05/2026), EU long (19 May 2026), US short (05/19/2026) and US long (May 19, 2026). The long formats write the month in the interface language; in French both read 19 mai 2026.
- **Timezone** — a long list grouped by region (for example Europe → Paris), straight from your operating system's timezone database.

Changes are saved as you pick them, with a "Locale preference saved" confirmation. The **Reset all to tenant defaults** button at the bottom clears your three overrides at once.

Tenant defaults vs personal overrides

Language, date format and timezone resolve in this order: your **personal selection** first, then the **tenant defaults** set by an administrator. With neither, the language and the timezone follow the **system settings** of the computer, and the date format follows the **interface language**: EU short (19/05/2026) in French, ISO (2026-05-19) in English. The computer's own date format is never used.

Because personal overrides are stored on the device, they do not follow you to another computer. Use **Reset all to tenant defaults** to go back to the tenant-wide behaviour set in System config & POS.

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Printing fiscal documents

Printing fiscal documents sets the paper this computer prints the X report, the session summary and the closures on:

- **A4 page** (the default) prints the full document.
- **80 mm receipt printer** prints the same document on the roll of a receipt printer, one long page. A daily closure (Z) printed this way keeps its fiscal content — identification, totals, VAT, payments, counters, the signature trace — and leaves out the day's detail, which the A4 document keeps.

Choose the receipt printer in the print dialog, and make sure its driver does not scale the page to fit. The setting is stored on this computer only, so two tills can use different printers. A document you save as PDF or send by email is always A4. A print is recorded the same way on either paper: the first is the original, a later one a duplicata.

Related

- System config & POS — admin — tenant-wide locale, currency, POS and newsletter defaults
- Sign in and manage your session — the user menu

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Getting help

This manual opens in its own window, next to the backoffice, so you can read it while you work.

Help for the screen you're on

Click the **?** icon to open the help at the part of the manual that describes what you are looking at:

- **On a page** — the **?** sits in the top bar, just left of your avatar (your photo or initials). It opens the chapter for that page; on a tab such as **Receipts** or **Closures**, it goes straight to that tab's section.
- **In a dialog** — the **?** sits in the dialog's header, just left of the **×** close icon. It opens the section that describes that dialog. The dialog stays open, with everything you have typed, while you read.

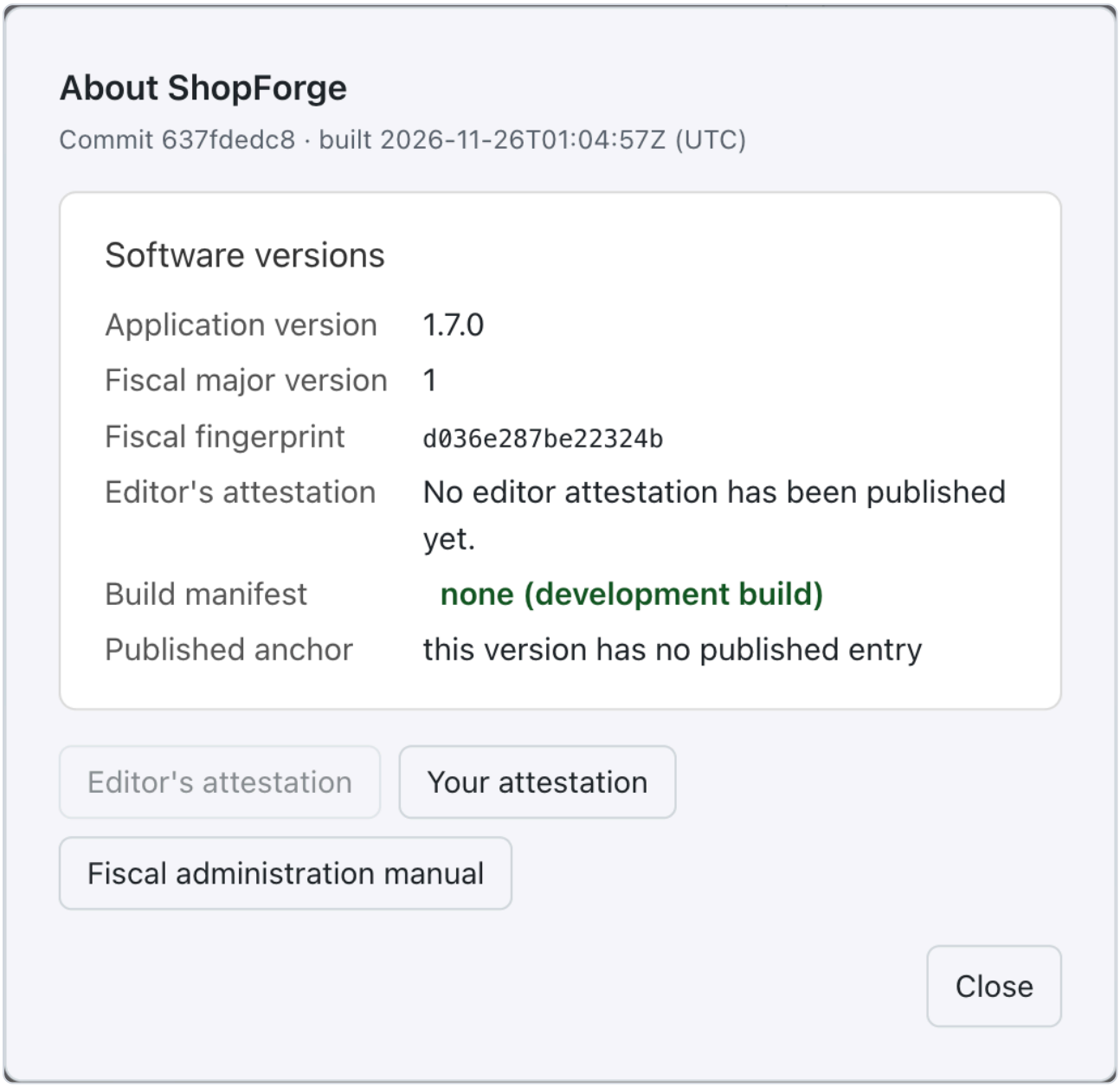
If the help window is already open, the **?** brings it to the front at the new section. The help opens in the language you use the backoffice in.

The full manual

Help → ShopForge Help in the menu bar (`Cmd+Shift+H` on macOS, `Ctrl+Shift+H` on Windows and Linux) opens the manual at its first chapter. From there, use the table of contents on the left or the search box to find any topic. The help is available once you are signed in.

Which version is this?





The version badge at the foot of the left-hand menu reads, for example, `v1.4.0 · DEV`: the version, then the environment this copy of ShopForge belongs to (`DEV`, `INT`, `STAGING`, `LOCAL`, or `PROD`). A coloured dot comes before it everywhere except in production, so a test session is never taken for a real one. Hold the pointer over the badge to see the build: "Commit *abcdef0* · built *time* (UTC)". On the sign-in page the badge is plain text.

Click the badge, or choose **About ShopForge** in the user menu, to open **About ShopForge**. It is read-only, works offline and shows the build line above, then the **Software versions**: the **Application version**, the **Fiscal major version**, the **Fiscal fingerprint**, the **Editor's attestation** (and whether it covers this version), the **Build manifest** and the **Published anchor**. They are the same values as in Fiscal settings. Under them, three buttons open the **Editor's attestation**, **Your attestation** and the **Fiscal administration manual**, for every employee (opening the editor's attestation is recorded in the JET journal; your attestation opens once this computer has been online since it was uploaded). If you report a problem, quote the version and the build line. Close the window with **Close**.

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Dashboard

The dashboard is the backoffice home page and the first thing you see after signing in. It shows how the shop is doing today — revenue, orders, low stock, pending orders, and recent activity — so you can see at a glance what needs attention. All figures come from the shop's local data and are as fresh as the most recent sync.

Last synced

The badge at the top right shows **"Last synced …"** with a status dot:

Dot colour	Meaning
Green	Synced — data is current.
Amber (pulsing)	Syncing right now.
Red	The last sync failed; retry when the connection allows.
Grey	Offline — you are viewing the last known data.

Working offline is expected: the dashboard reads from the local copy and keeps displaying it, with the "last synced" timestamp so you know how fresh it is.

Default layout by role

- **Administrators** start with 10 widgets: Revenue, Orders, Channel Split, Sales Trend, POS Sales, Inventory Value, Low Stock, Pending Orders, Recent Orders, Customers.
- **Employees** start with 7: Revenue, Orders, Sales Trend, POS Sales, Low Stock, Pending Orders, Recent Orders.

Everyone can add, remove and re-order widgets — see below.

Edit layout

Your layout is personal: it is saved per user, follows you across devices, and is cached locally so editing also works offline.

Widget palette

1. Click **Edit layout**. Each widget gains edit controls (move up, move down, remove ×) and a **widget palette** opens on the right listing every widget currently hidden.

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2. **Re-order** - Use the ▲ / ▼ arrows on a widget to move it up or down the grid.
3. **Remove a widget** - Click the ✕ control. The widget moves back to the palette, not away forever.
4. **Add a widget** - In the palette, click **+** next to a widget to place it on the grid. Widgets with restricted roles (e.g. manager-only) only appear when your role allows the data.
5. Click **Done** to save. A toast confirms "Dashboard layout saved"; if you are offline the layout is kept locally and synced on the next connection.

If your dashboard is emptied or the saved layout cannot be loaded, the default layout for your role is used instead.

Available widgets

Widget	What it shows
Revenue	Today's total revenue, split by online vs. POS.
Orders	Today's total order count (online + POS) and average order value.
Channel Split	Today's online vs. POS revenue breakdown as a percentage, plus a **Discogs** card for a shop that sells on Discogs.
Sales Trend	Daily revenue over the last 7 days.
Best Sellers	Top-selling products by revenue this month.
POS Sales	Today's register revenue and transaction count.
Inventory Value	Total stock value and the value of the five highest categories.
Categories	Number of products by category, with each category's share. (Hidden by default)
Low Stock	Products with 1 to 10 units in stock.
Out of Stock	Products with zero remaining stock. (Hidden by default)
Slow Movers	Products in stock, the longest unsold first, with the days since their last sale. (Hidden by default)
Pending Orders	Orders received, waiting or being prepared, the oldest first, with urgency markers.
Recent Orders	The 10 most recently created orders, each with its channel (Online, POS or Discogs).

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Widget	What it shows
Customers	Total customer count and new customer acquisitions this month.

A Discogs order is counted in its own channel. In **Channel Split**, the **Discogs** card shows the revenue from Discogs orders with its share of the total; it appears only once the shop has Discogs revenue, and the percentages of the three channels share one total. In **Recent Orders**, a Discogs order carries the **Discogs** channel badge. See Orders.

Related

- Sign in and manage your session
- Offline & synchronization

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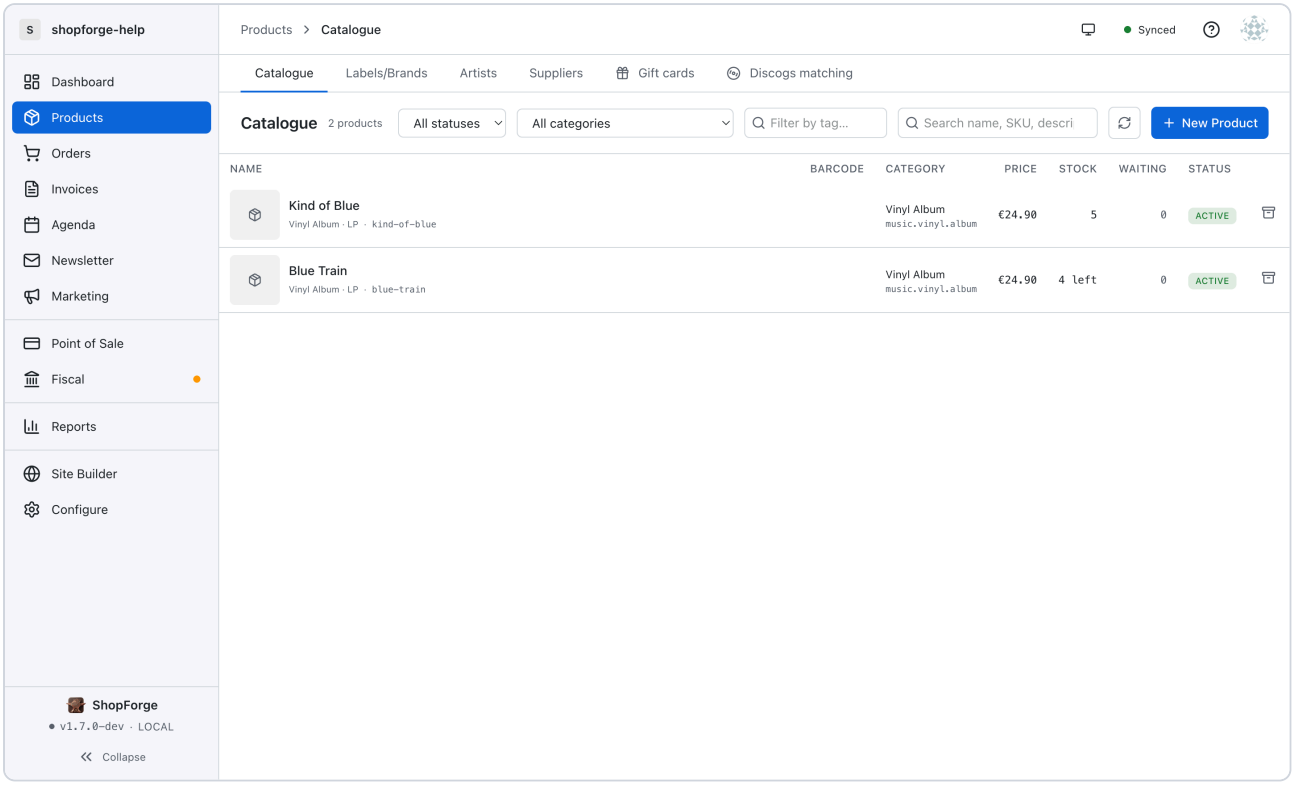
Products



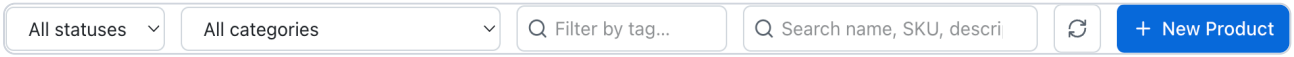
The catalogue is the single source for your products — it feeds the storefront, the POS and the dashboard. Opening a product, searching the catalogue and editing entries all run against the shop's **local copy**: the catalogue keeps working offline, and every change is synced in the background.

Products are organised in six tabs: **Catalogue**, **Labels/Brands**, **Artists**, **Suppliers**, **Gift cards** (see Gift cards) and, last, **Discogs matching** (see Discogs matching).

Before you start

Categories come from the tenant **schema** (Configure → Schema). Without a schema the product form shows "No product schema available."

The catalogue



The catalogue toolbar offers:

- **Search** — by name, **SKU**, description or attributes, or by **part of a barcode**: type any run of digits from anywhere inside it (spaces are ignored, so `64649` finds `8 25646 4931 6`). A SKU is found by any part of it, like a barcode. A search with no digit in it only looks at names, descriptions, attributes and SKUs, so a barcode made only of letters is not found here — the POS still finds it.
- **Filter by category** — the schema's ★-marked **quick-link categories** on top, then the indented category tree ("All categories" by default).
- **Filter by status** — one drop-down, one choice at a time: **All statuses** (the default: every product that is not archived), **Archived**, **In stock** (only products with stock), **Preorder** (only products currently taking pre-orders, see Pre-orders) and, once a Discogs seller account is connected, **Not ready for Discogs** (see Not ready for Discogs). These choices do not combine with each other; search, category and tags still combine with whichever you pick.
- **Tags** — filter by one or more tags.
- **Supplier** — not a control of the toolbar: clicking a supplier's product count in **Products → Suppliers** (see Suppliers) opens this list with a **Supplier: {name}** chip, showing only that supplier's products (the archived ones from the **+N archived** link). The **×** on the chip removes the supplier and keeps the status view.
- **Refresh from server** — forces a fresh snapshot download (slow on large catalogues).

Columns: Name, Barcode, Category, Price, Stock, Waiting, Status. Stock below 5 shows "{n} left" in warning colour, `0` shows "Out of stock". The stock column also carries the pre-order badges: a green **{n} preorders left**, an **{n} preorders to hand over** badge and a red **Delayed release**. Status chips distinguish **Draft**, **Active** and **Archived**. The list caps at 200 rows — the "Showing {shown} of {total}" banner means you should narrow the search. The **Barcode** column shows the default variant's barcode; you can search on it but not sort by it.

The **Waiting** column (hover its title: "Customers waiting for an alert") counts the customers who asked to be told when the product can be bought again, for all its variants. Only confirmed signups are counted, and you see a number, never an address. It is the only column you can sort by: click its title for the most waiting first (↓), again for the fewest first (↑), and a third time to go back to the usual order. Clearing the filters keeps the sort.

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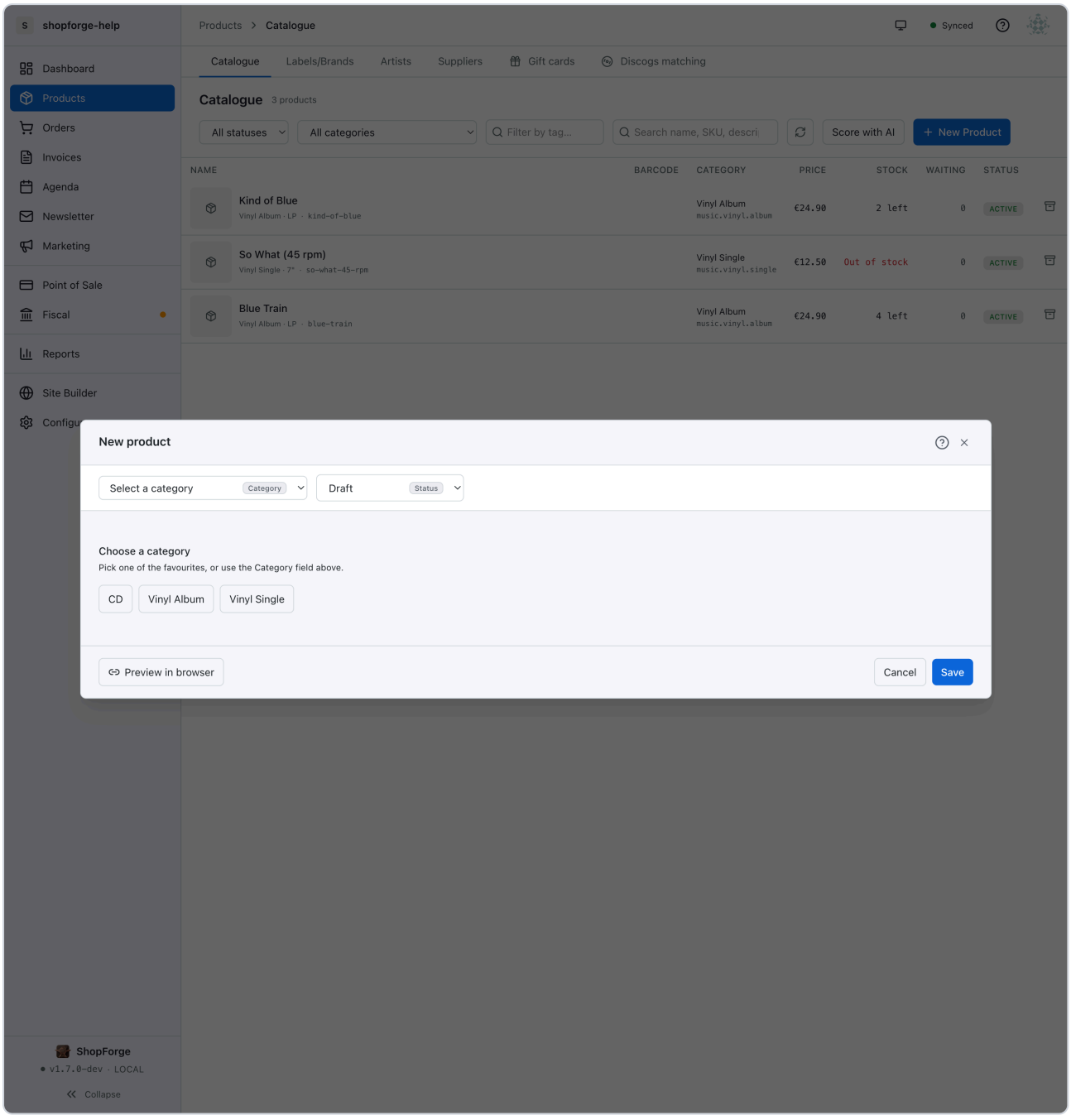
Create or edit a product



Use **New Product** (or click a row) to open the editor:

When you create a product, the editor opens on a **start screen**: choose its **category** there. The favourite categories (the ★-marked ones of the catalogue) are buttons; the others are in the **Category** field of the bar under the title. Until a category is chosen, no form is drawn. On an existing product the category is shown in the title.

To move an existing product to another category, use **Change category** in the bar, to the right of **Status**, and pick the new category (the current one is greyed out; gift cards, donations and memberships are not offered). A confirmation asks "Are you sure? This may lose some of the attributes that are not present or conflict with the values from the new category." Choose **No** to

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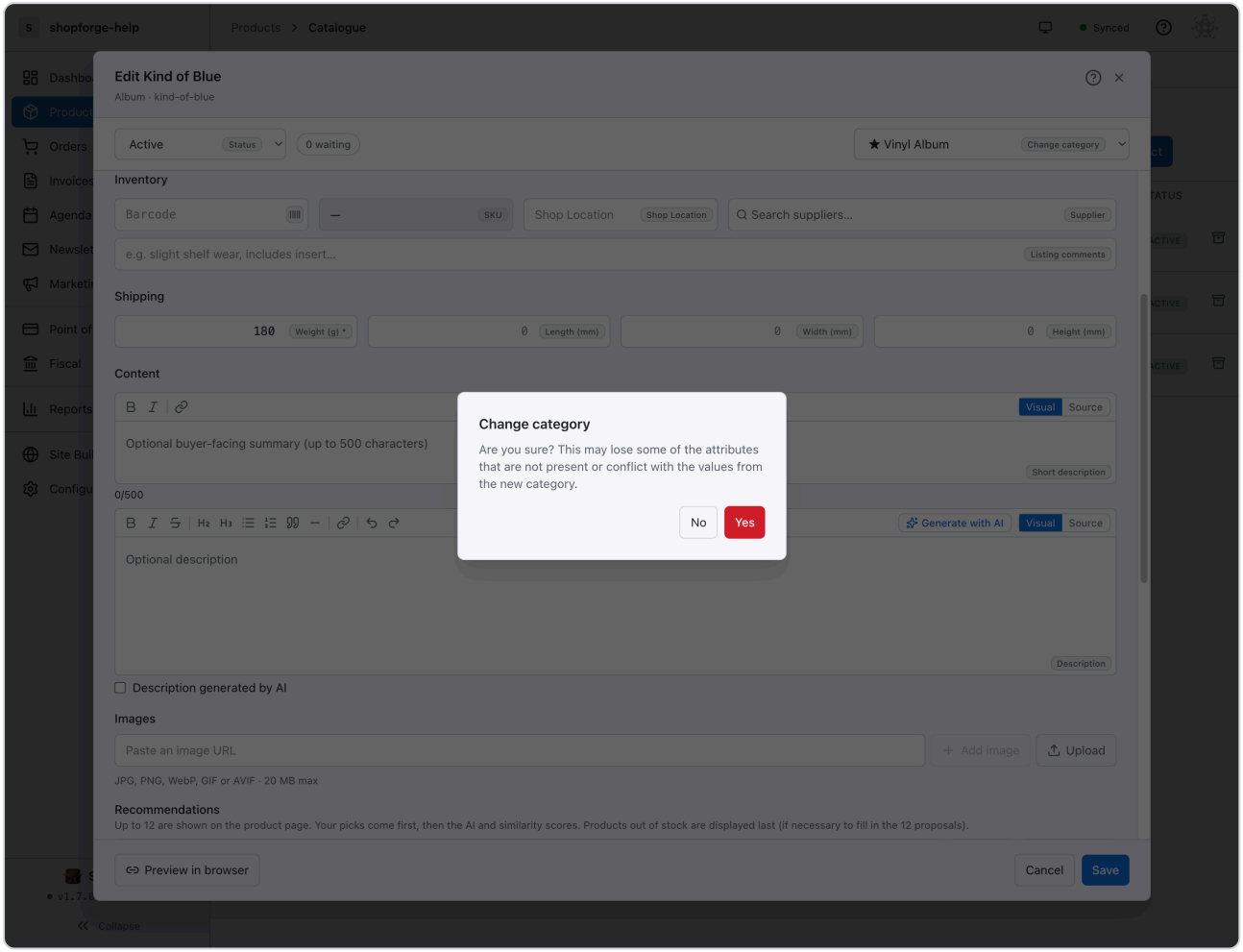
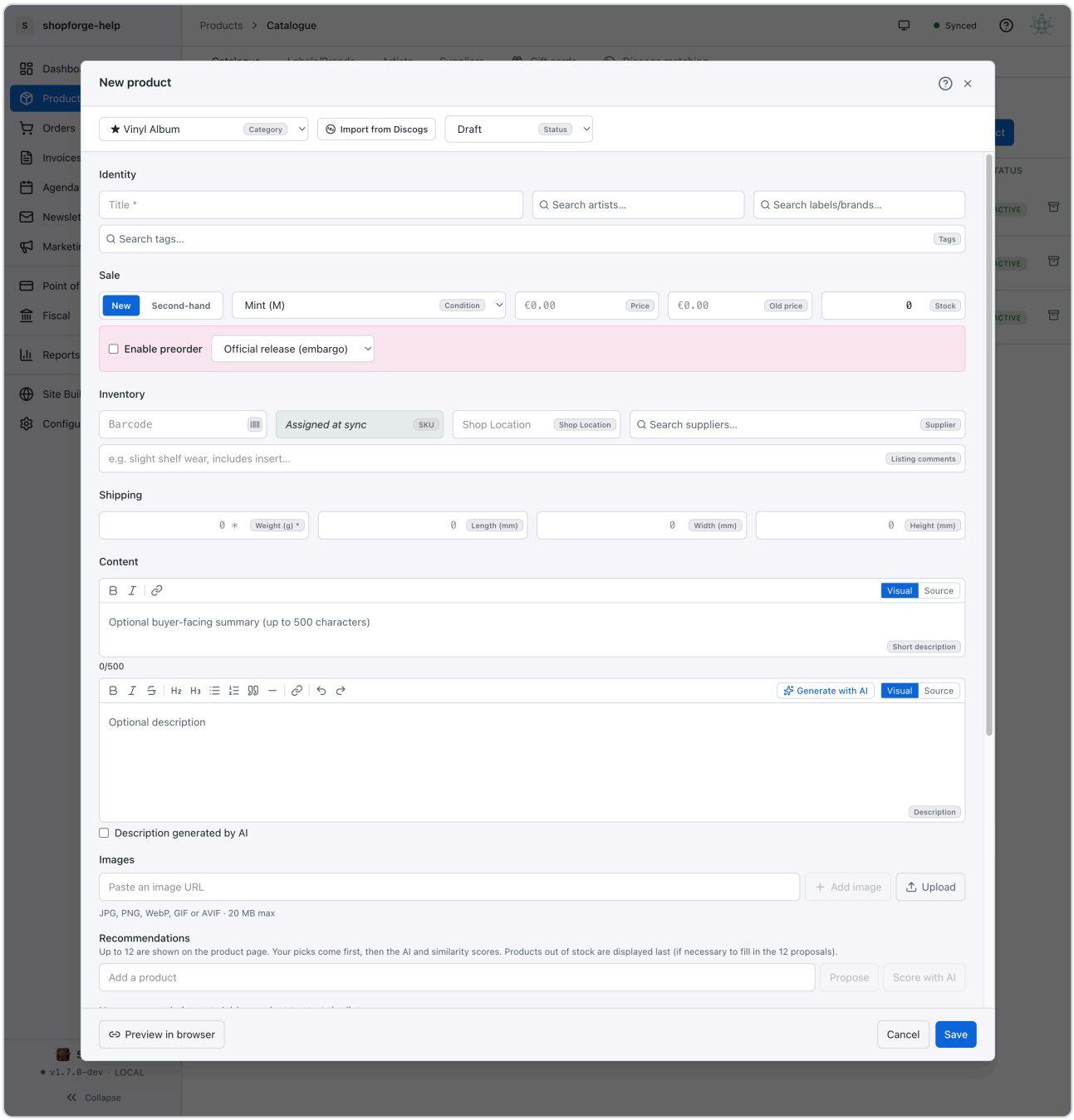
change nothing, or **Yes** to draw the form for the new category. Nothing is saved yet: a choice that the new category does not offer (for example a Condition) takes the new category's starting value, and the change is made only when you press **Save**. On Save, the attributes of the old category that the new category does not define are dropped.



The bar under the title also holds the **Status** (draft, active or archived) and, for a music category when the Discogs integration is connected, **Import from Discogs** (see Import from Discogs).



For a product that already exists, the bar also shows a pill "{n} waiting" (for example "12 waiting"): the total of customers waiting for an alert on this product, confirmed signups only, all variants added up. Hover it for "Total for this product. Confirmed signups only."

The form is in seven groups, always in this order, for every category. A group your category does not use is not drawn, and a field your category does not use is simply absent:

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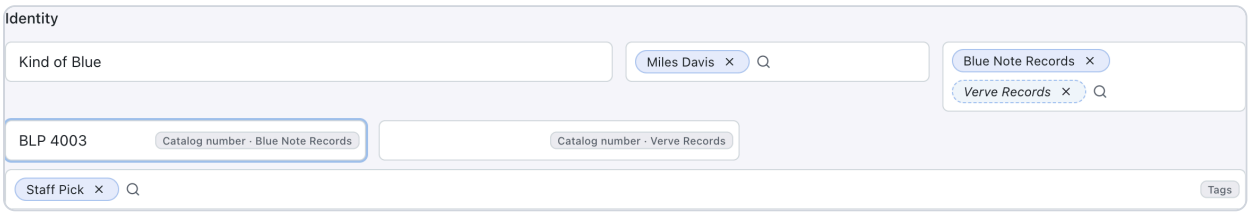
1. **Identity** — **Name** (required), **Artist** (search and pick, or **Create "{name}"** inline), **Labels/Brand** (search and pick, or create inline), the **Catalog number** of a product that has one (music, film, print, hi-fi, merchandise and visual categories), and **Tags** (select or create). The catalog number belongs to a label: under the **Labels/Brand** field there is one **Catalog number · {label}** field for each label you selected, and you can leave it empty. Adding a label adds its field, and removing a label removes its field and its number. Each label of the product keeps its own number.



2. **Sale** — first, the gift card, donation or membership section where the category has one. Then **New / Second-hand**, a two-way switch with no label of its own: it is on **New** unless you choose **Second-hand** for a copy you bought from a private person. It does not depend on the condition: a second-hand copy can be graded or not, and a new copy can be graded too. It appears for any physical product, and not for gift cards, donations or memberships (your administrator can also turn it off for a category). A second-hand copy is sold under the margin scheme (VAT on the margin), and choosing **Second-hand** replaces the product's suppliers by **Private seller**; choosing **New** again removes it and leaves the supplier empty (see Suppliers). Then **Condition**, where the category has one: for example Mint or Very Good, the grade of the copy, whether it is new or second-hand. It is absent for hi-fi equipment, textile and objects, visuals (posters, photos), themed packs, gift cards, donations and memberships, and nothing is required there to make the product active. Then **Price**, **Old price** and **Stock**: an empty price and old price read "0,00 €" (in the product's currency) and an empty stock reads "0". The old price is struck through in the shop, and the product counts as on sale, only when it is higher than the price. **Eco-participation (per unit, incl. VAT)** is for new electrical and electronic equipment only (a turntable, speakers, headphones). It shows only for a product whose category is marked for it (the categories are marked in the shop's product schema: a vinyl, a book or a poster has none), on its own line below the row of New / Second-hand, condition, price, old price and stock, with its hint beside it. Type the amount the law asks you to show for one unit, VAT included. It is **part of the price**, not added to it: a €120.00 turntable with €1.50 of eco-participation still costs €120.00. It shows apart, under the price: in the till's basket and in the shop, "incl. eco-participation €1.50" (in the language of the interface), and in the receipt's PDF and the invoice, « dont éco-participation 1,50 € » (and as a note on the line of the electronic invoice). It is never more than the unit price, and a discount never takes it off: it is calculated on the price without it. The field is hidden on a second-hand listing, which carries none whatever the variant holds, and neither do gift cards, donations and memberships. Changing a product to a category that is not marked for it empties the amount when you save. Raising the stock of a listing and saving also moves the product up the shop's **Newest** order, which follows the last time you added stock by hand. Sales, receipts and imports do not. Last, the **pre-order** switch and its settings: see Pre-orders. **A donation** is outside the scope of VAT: it has no VAT rate, at the till and online, whatever the shop's VAT settings say, and there is nothing to set for it. Keep it a gift with nothing in return: no discount, member benefit, present or access, an amount the donor chooses (never pre-filled or suggested by the shop), and no donor name published.

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3. **Inventory** — **Barcode** (EAN / UPC): it belongs to the variant, and it is what the POS scanner and the catalogue search read. **SKU**: the variant's code, for ordinary products (not gift cards or donations). You never type it: ShopForge generates it (for example `bs-560402`) when the product is synced, and it shows as read-only text. Until then, a new product reads *Assigned at sync*; a product that is synced but has no SKU reads "—". The catalogue search finds it. An imported SKU is kept as it is. The prefix is set in **Configure → System → Default values**. **Shop Location**, a custom attribute of the category. **Supplier**: who you buy the product from; internal only, never shown to customers. Any employee can pick an existing supplier; only an administrator can create a new one. See Suppliers. Under each supplier you pick, a **Purchase cost** field takes what you pay that supplier for one unit, excluding VAT. It is internal: customers never see it. Last, **Listing comments**: a free text about the copy (shelf wear, includes insert...).

4. **Shipping** — **Weight**, **Length**, **Width** and **Height**, used for shipping: an empty field reads "0", and the weight is required for a product that ships in a parcel. A gift card that is not delivered, a donation or a membership ships nothing, so this group is not drawn for it.

5. **Content** — **Short description**, an optional summary for buyers, written in a compact version of the description's Markdown editor, up to 500 characters; a counter under the field shows how many you have used. It can carry formatting and links, including links to other shop pages. It is saved and synced with the product like any other field. The product page shows it as a paragraph under the brands line, unless the category's schema hides the field. The catalogue's product cards show its plain text, shortened to 280 characters. Then **Description**, the Markdown editor. Then **Images**, under their own subtitle: see Images. Then **Recommendations**: see Product recommendations.

6. **Additional information** — under its own subtitle, the **custom attributes** your schema defines for the category, one line per group: format, speed and size; then the colour; then miscellaneous; then genre; then style; then the tracks. An attribute your schema defines that is not in these groups comes last. An attribute with a fixed list is a drop-down. When the list offers an empty choice, the drop-down lists **Please select** first, and choosing it leaves the attribute empty. A new product starts on the first value of its list, or on **Please select** when the list begins with the empty choice. If you change the category of a new product before saving, the attributes you have not touched take the new category's starting value. An existing product shows the value it holds. An attribute with no value shows **Please select**, even when its list has no empty choice, and stays empty until you choose one. The **Catalog number**, the **Shop Location** and the Discogs ID are not in this group: they sit in Identity, Inventory and Discogs.

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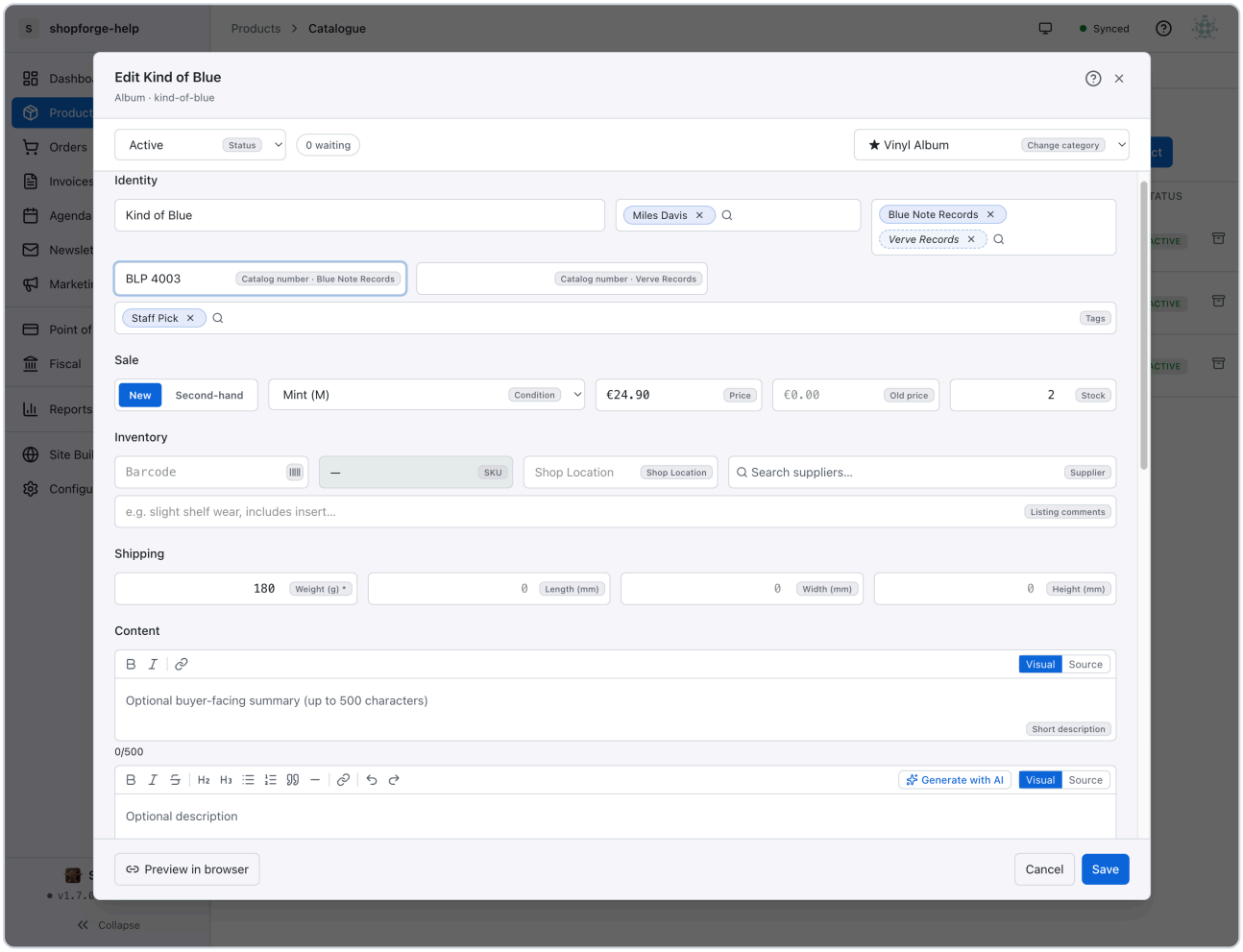
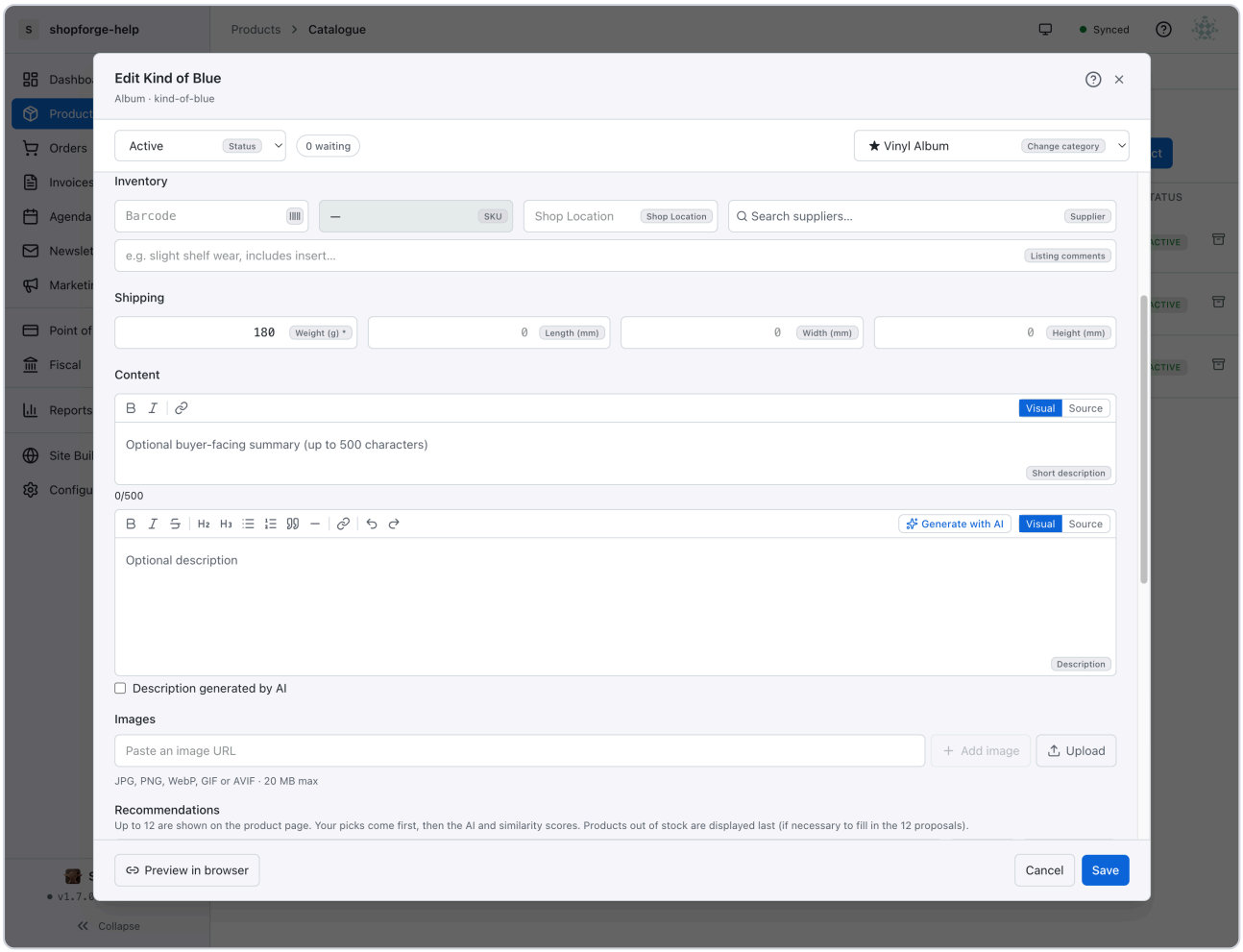
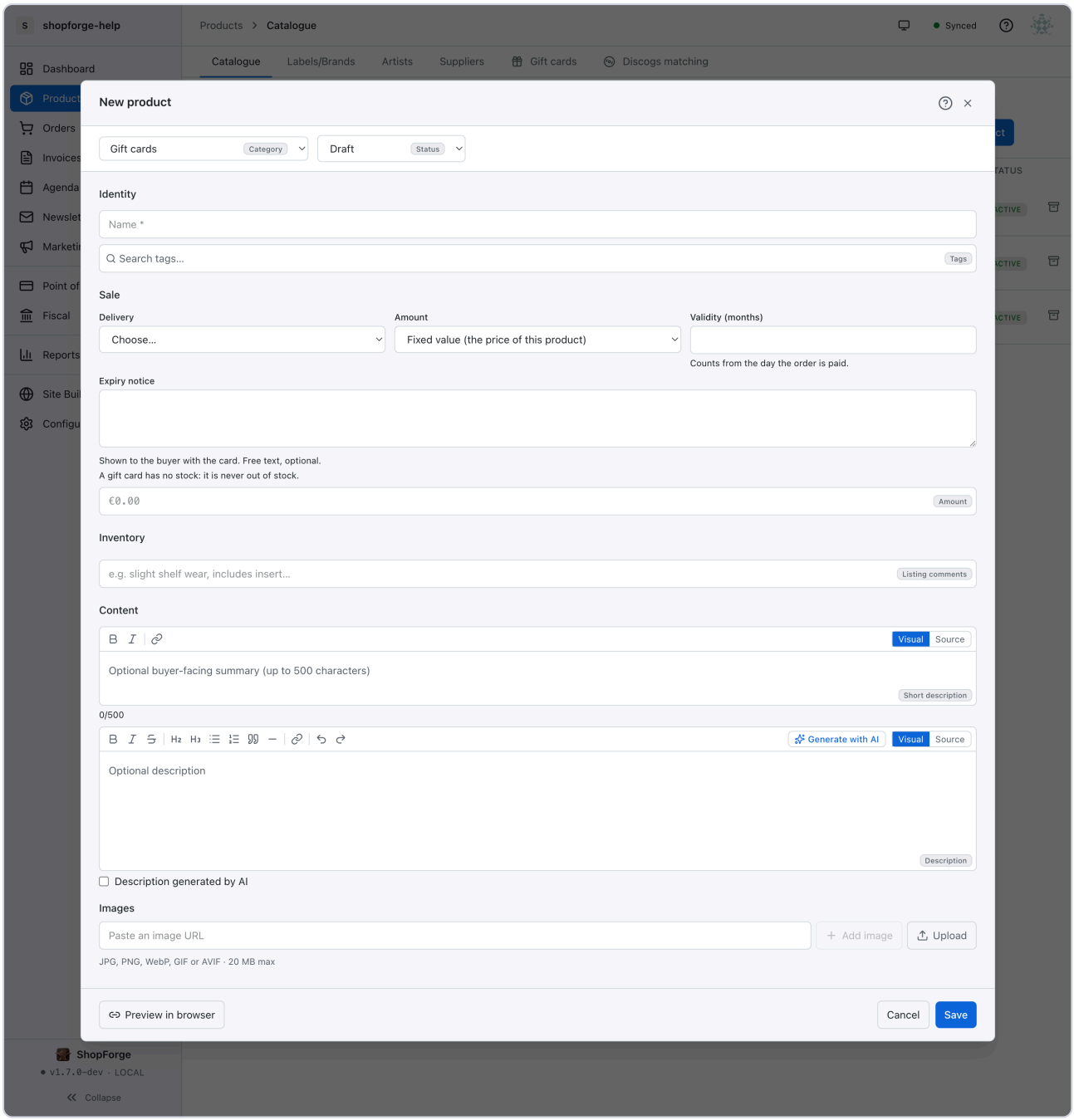
7. **Discogs** — in music categories, under its own subtitle, when the category has a Discogs ID: the **Discogs ID** of the copy, always. When your administrator has enabled the Discogs channel (**Configure → Integrations → Discogs**), the other Discogs fields follow it: the pressing line, the fields of the copy for selling on Discogs and the channel line. See Discogs on the product.

A vinyl product, groups 1 and 2, then groups 3 to 5:





A gift card has its own section first in Sale, and no Shipping group when it is virtual:



Changes are saved locally first and synced in the background; the confirmation means "queued", not necessarily "on the server" yet. The **slug** is generated automatically when you create the product and never changes afterwards — it is shown read-only in the header.

Images

A product can have several images. The first image that has not failed is the main one: it carries the **HERO** badge when the product has more than one image, and it is the picture customers see first. A failed image is never shown to customers.

Add an image in one of two ways:

- **Paste an image URL** in the **Images** field and choose **Add image** (or press Enter). The picture is fetched from that address, for example a Discogs photo.

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- **Upload** one or more files from your computer, or drop them on the field. Upload needs an internet connection.

Accepted files are JPG, PNG, WebP, GIF or AVIF, 20 MB at most each. A file of another type, an empty file or a file over 20 MB is refused at once: a message under the field names it, and it does not become an image. Three files at most upload at the same time; the others show **Waiting...**.

Each image is a tile:

- **Upload in progress** — a bar along the bottom edge fills as the file goes up. ✕ cancels the upload.
- **Added** — the file is uploaded and is kept when you save the product.
- **Processing** — you have saved, and a spinner shows while the picture is prepared for the shop. On the computer that uploaded the file, the picture itself shows straight away instead; the spinner only appears on another computer.
- The picture itself, once it is ready.
- **Failed** — a red warning icon. The reason is written under the field (see below).

Use **Move earlier**, **Move later** or **Make primary** on a tile to change its place; you can also drag it by its handle. To replace the main image, upload the new one, choose **Make primary** on it, then remove the old one. ✕ removes a tile, and the removal is kept when you save.

When an image fails, the reason is written under the field:

- **The image format is not supported.** Remove it and add a JPG, PNG, WebP, GIF or AVIF image.
- **The image is too large** for the shop to process: it is too heavy, or it has too many pixels. Remove it and add a smaller copy of the picture.
- **The file could not be read as an image.** It may be damaged. Remove it and add another copy.
- **The uploaded file is no longer available.** Remove it and upload it again.
- **The address did not return an image** (not found, or access refused). Check the address, then choose **Retry**.
- **The image could not be processed.** For an image from an address, choose **Retry** or remove it. For an uploaded file, remove it and upload it again, or try later.

Only an image from an address can be retried. An uploaded file cannot: remove it and upload it again from your computer.

Without an internet connection, **Upload** stays visible but does nothing, and the hint under the field says that uploading needs a connection. You can still paste an image URL: like any change, it is saved on this computer and sent when the connection is back.

Preview in browser

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Preview in browser is the button at the left of the footer of the editor, away from **Cancel** and **Save**. It shows the product's page **as the form is now**, saved or not, with your **published design**, in your default browser. It works for an active product, a draft, an archived product and a product you are creating. **Nothing is saved or sent**, and the editor stays open, as you left it.

- **A snapshot, in a new tab.** Each click opens a new tab with a fresh copy of the form. The tab does not follow what you type afterwards: change the form, then click again. Closing the tab ends the preview. The app keeps the last 20 previews for two hours: a tab reloaded after that reads "Preview expired. Open it again from the product form."
- **A banner you cannot close** is at the top of the page. It says what you are looking at: "Preview · your changes, not saved yet." for a product you are editing, "Preview · new product, not saved yet." for a new one, and, for a draft or an archived product, "This product is a draft. It is not visible on your site." or "This product is archived. It is not visible on your site." A last line says which design the page uses: "Published design of" followed by the date and time of the published version, or "Your site has not been published yet: this preview uses your current design."
- **Required fields.** If a required field is empty, nothing opens: the same fields are highlighted as for **Save**, and a message says "Fill in the required fields to preview."
- **If it cannot open,** a message says "Couldn't open the preview." with the reason.
- **Images you have just added** show from the copy kept on this computer, even before the server has processed them. An image uploaded from another computer that is not processed yet does not show.
- **It is only a preview.** The cart, the wishlist and the checkout do nothing on the page, and search engines are told not to index it.

The preview needs no internet connection: it reads this computer's copy of your shop. When you are offline, it uses the design version this computer last saw as published.

Pre-orders

A **pre-order** lets customers reserve units of a product before it is physically in the shop. You say how many units you expect, and the storefront sells ahead of the delivery. There are two kinds, for the two situations a shop meets.

The two kinds

- **Official release (embargo)** — a new release with a street date. The **release date** is required and must be in the future when you turn the pre-order on. Nothing is handed over or sold at the till **before that date**, even if the units arrived early: units that arrive early are set aside for the pre-orders, and what is left over becomes ordinary stock on the date. If the release is late (the date has passed and nothing is on the shelf), the product keeps taking pre-orders.

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- **Restock (awaiting delivery)** — copies you have ordered from a distributor and pre-sell while you wait. The date is only an **expected arrival**: it is optional, it can be any day, customers see "Expected arrival on {date}" when you give one, and it gates nothing. An order is handed over as soon as its units have arrived, and the till is never blocked.

Turning a pre-order on

1. Open the product in the catalogue — the pink **pre-order box** sits at the top of the form.
2. Tick **Enable preorder**. It can only be turned on while the product has **no stock** (stock 0). If copies are on the shelf the tick is locked and the box says "Sell the stock, or correct it to 0, before turning preorder on".
3. Choose the kind: **Official release (embargo)** (the default) or **Restock (awaiting delivery)**.
4. Choose the date: the **Release date** of an embargo (strictly in the future), or the date **Expected arrival** of a restock (optional).
5. Enter the **Expected quantity** — the total units you expect; at least 1.

The kind is fixed while the pre-order is on. To change it, turn the pre-order off and save, then pick the other kind and turn it on again: two saves.

Pre-order items can only be ordered **through the storefront** — never from the backoffice or the POS.

Watching capacity

While a product is taking pre-orders, the catalogue's stock column shows a green **{n} preorders left** badge — the capacity still available (expected quantity minus what is already reserved). When it reaches `0`, the storefront stops taking pre-orders for it. You can raise the expected quantity, but **not lower it below what customers have already pre-ordered** ("Cannot go below the {n} already pre-ordered."). The **Preorder** choice in the catalogue's status filter narrows the list to the products in a pre-order cycle.

When the units arrive

Units that arrive first cover what was pre-ordered; the rest becomes ordinary stock you can sell, online and at the till (for an embargo, from the release date). The product stops being a pre-order as soon as there is stock on the shelf and, for an embargo, its date has passed.

- **Delayed release** (red badge) — a pre-order whose date has passed but **no unit has been received yet**, for either kind: a late embargo, or a restock whose expected arrival has passed. A restock with no date is never delayed. The product keeps its **Preorder** button; the page reads "Expected release on {date}" for an embargo and still "Expected arrival on {date}" for a restock. The badge disappears as soon as the first unit is received.

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- **{n} preorders to hand over** — customers have pre-ordered units that are still owed to them, and the product is no longer in pre-order (it has been released or restocked). The badge counts the units still to hand over and stays while there are some. A product can show both this badge and **{n} preorders left** when one of its variants is released and another is still taking pre-orders.

Turning a pre-order off

When every pre-order has been handed over (or cancelled, or refunded), turn the tick off: the product is an ordinary product again, and the next restock, once the stock is at 0, starts a new cycle — turn the pre-order on again.

The tick is refused, and says why, while:

- pre-orders are still to hand over ("{n} units still to hand over"), or
- an embargo has not reached its date ("Release date not reached").

Turning it off resets the expected quantity and the reserved count; the release date stays on the product as plain information.

Generate a description with AI

Requires an AI provider set up under **Configure → Integrations → AI**. The provider you made **active** writes the text, Claude or Mistral.

1. Open a product (or an artist or a label), click **Generate with AI** next to the description. The window opens on the **language** of the text and **Generate**; the result will appear right under them. The instructions the AI receives are folded away in **Shop prompt (used for every description)**, at the bottom.
2. Pick the **language** of the text. The parts of the prompt that depend on it (voice and style, typography, words to avoid) change with it; a part you edited keeps your text.

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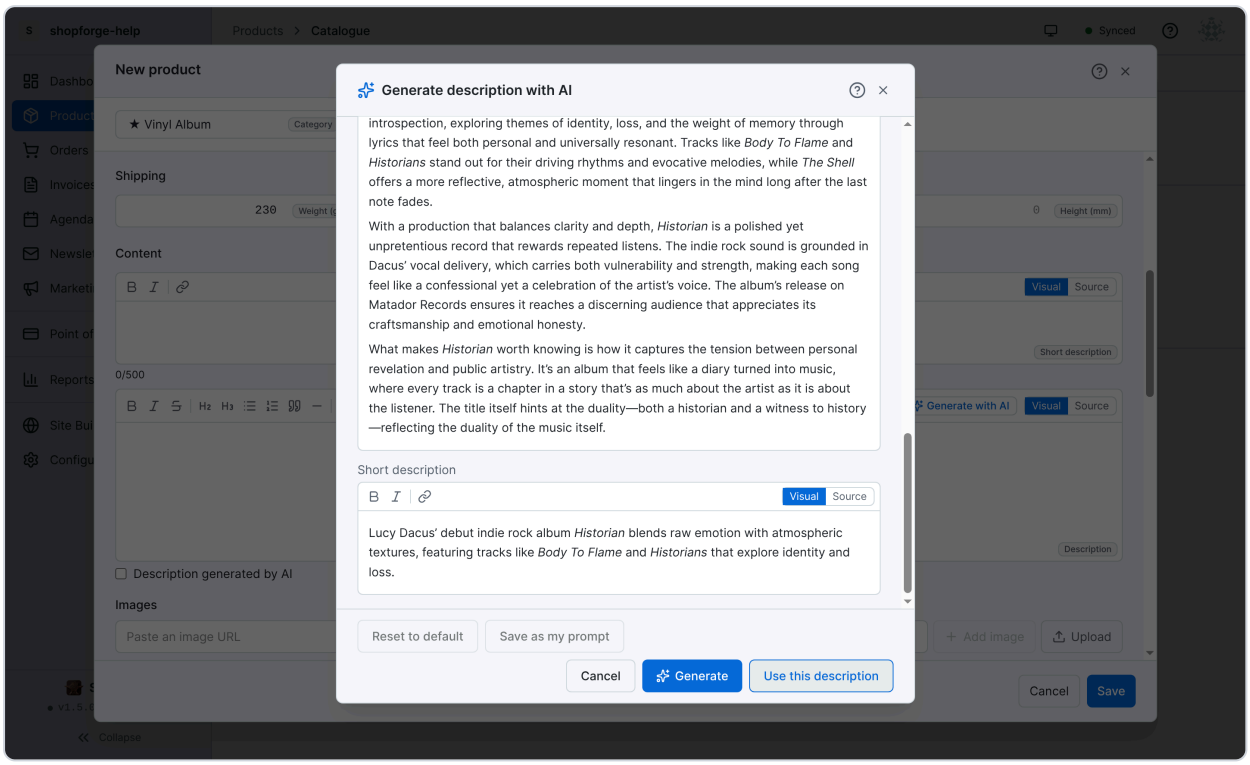
3. Click **Generate**. It can take several seconds. The window then shows two editable fields: **Description** and **Short description** (an artist or a label has only the description). The text is not checked sentence by sentence: read what you got before you use it. If the answer cannot be read, the window says so; click **Generate** again.



4. Click **Use this description**. The texts go into the form.

Open **Shop prompt (used for every description)** to read or change what the AI is told. It lists the **parts** of the prompt in the order the AI reads them, each with a plain title and, in small type under it, its technical name: *The task*, *The product data you receive*, *1. How well known it is*, *2. How much to write*, *Facts*, *Data that can be misread*, *Words and claims to avoid*, *Voice and style*, *Typography*, *Product wording*, *Shape of the text*, *Kind of product* (album, single, box set, book or comic, magazine or poster, hi-fi, merchandise; for an artist or a label, *Kind of subject*), *3. Re-read and polish* and *The answer to send back*. The *Kind of product* part is open, the others are folded: click a title to read or **edit** its text. It follows the product's category; you do not choose it.

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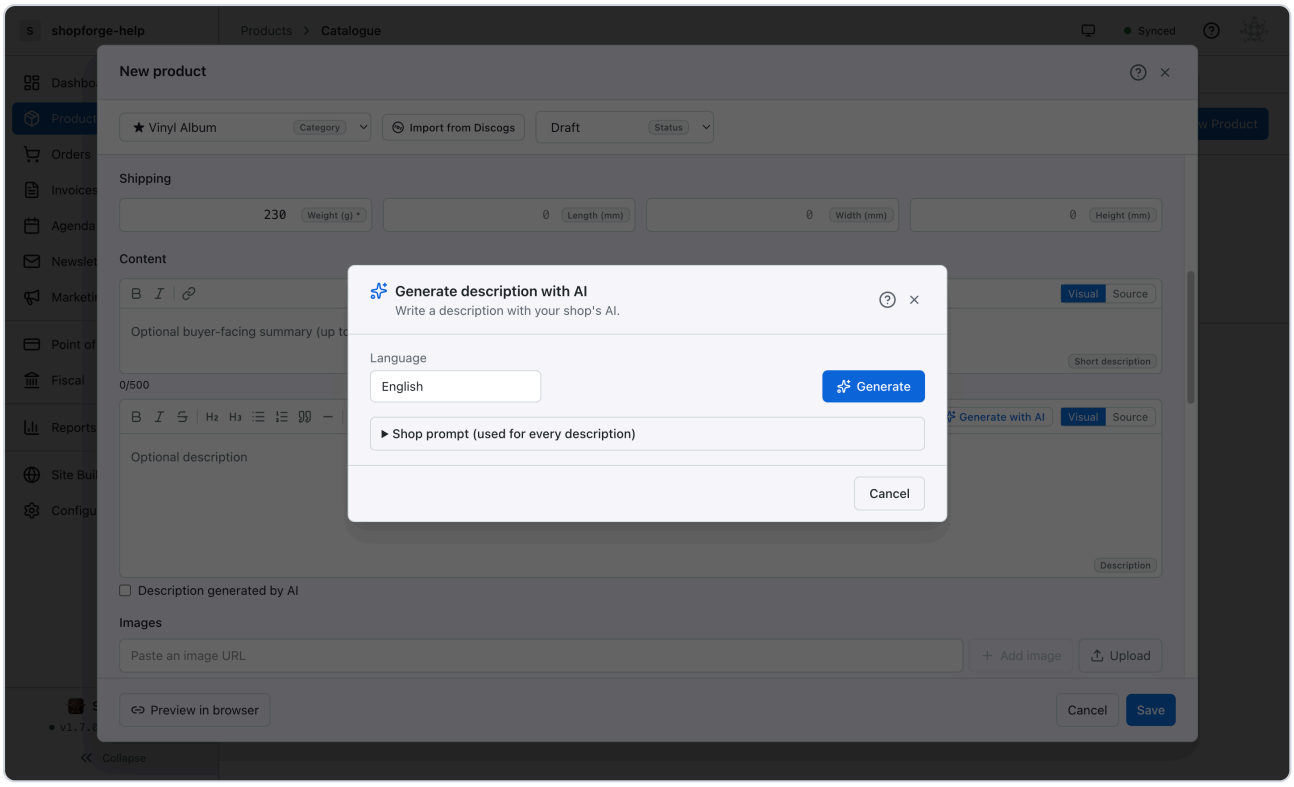
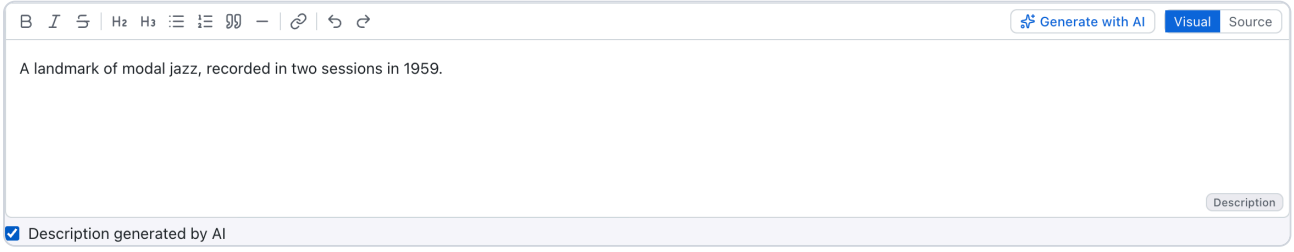


Data sent (read only) in the same place shows the data itself, what the AI is told about the product (for an artist or a label, the name, and once you have generated, the Discogs profile that was sent with it). Complete the product form first if something is missing: the AI takes everything about this edition (year, label, country, format, tracks) from this data only. For a well-known work (an album, a book, a comic), it also draws on what it knows about the work itself, so check those facts before you save.

Generate changes nothing in the product form: only **Use this description** replaces the description and the short description, with no undo. You can generate as often as you like before that, editing the parts or the texts between two tries. Use the texts only when you are ready to overwrite, and always review before saving.

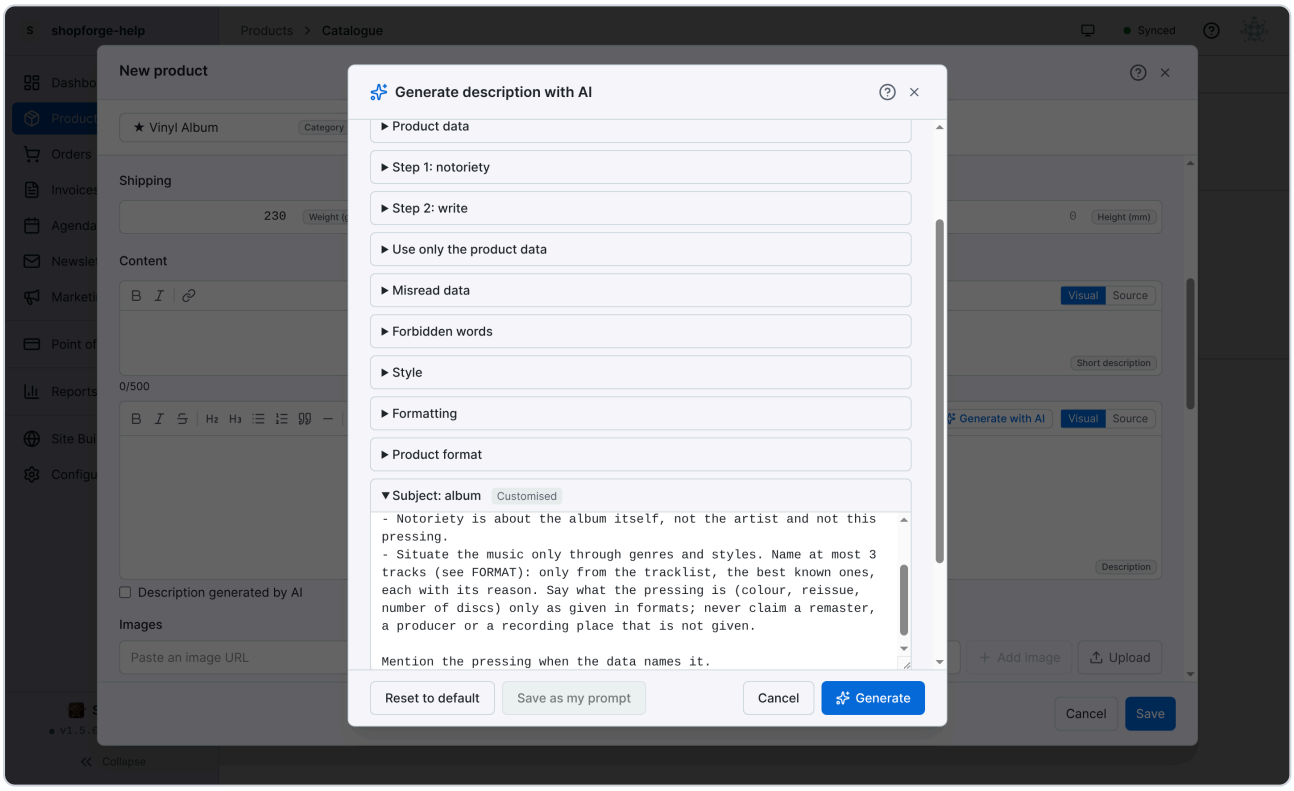
Using the texts ticks **Description generated by AI**, the checkbox right under the description. Your shoppers then see a small note under the description on the product page (by default "* AI-generated description, to help you discover this item."), so they know the text was written by AI. Editing the text does not untick the box, so a typo fix never drops the note. Emptying the description unticks it, and you can tick or untick it yourself at any time. The note's wording is set in the Site Builder, see Product description.



Your own prompt

What ships with ShopForge is the default prompt. An **administrator** can keep their own version for the whole shop, from **Shop prompt (used for every description)** in the window above. It says it is for every description because **Save as my prompt** changes the prompt of the whole shop, for every employee, and asks nothing:

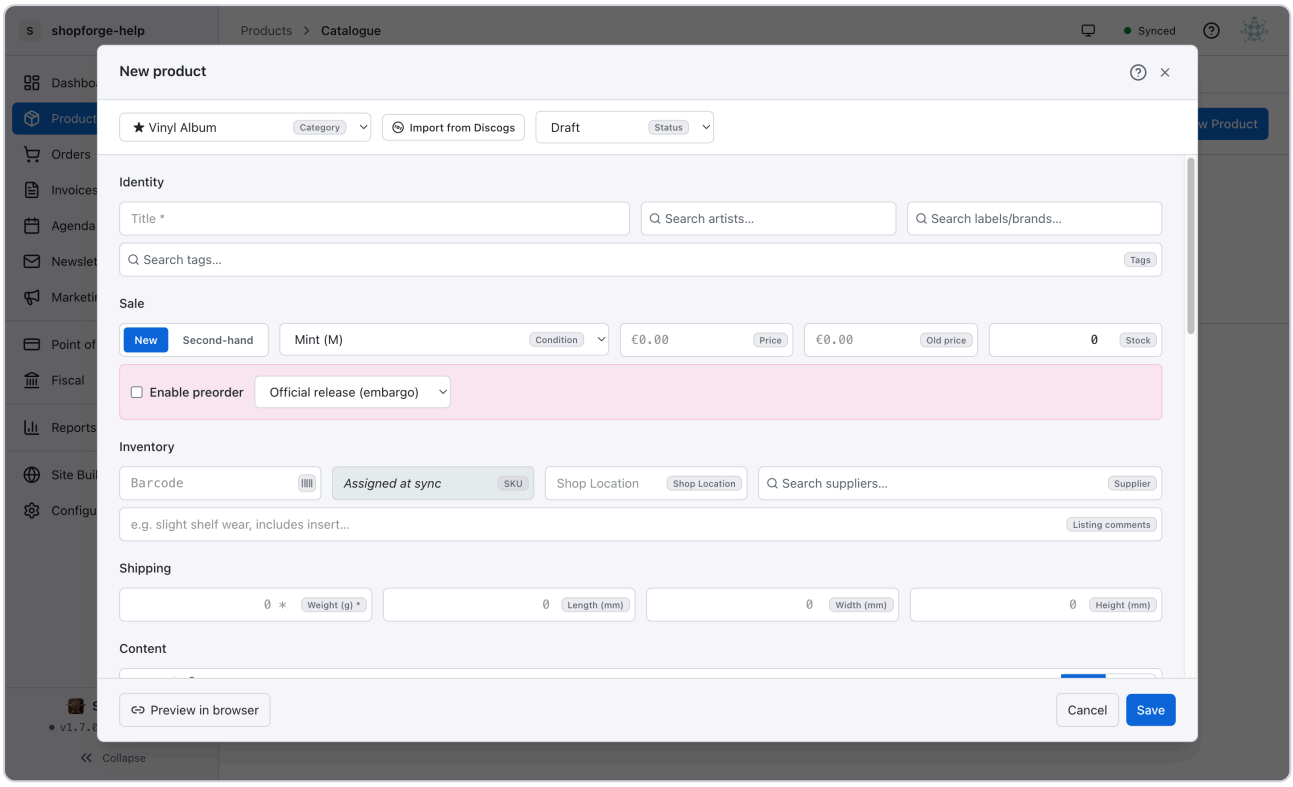
- **Save as my prompt** saves the parts you changed, for this kind of product and the interface language. The other parts stay the shipped text, so an improvement to a shipped part is picked up.
- A saved part shows a **Customised** mark next to its name, and the **Shop prompt** title shows it too while the shop has a prompt of its own, even when the disclosure is closed. Every employee who opens Generate on a product of the same kind gets your text; only administrators see the two buttons, at the foot of the shop prompt.
- **Reset to default** deletes your saved parts for this kind of product and language, and shows the shipped text again. It also discards any edit in the window that you had not saved.



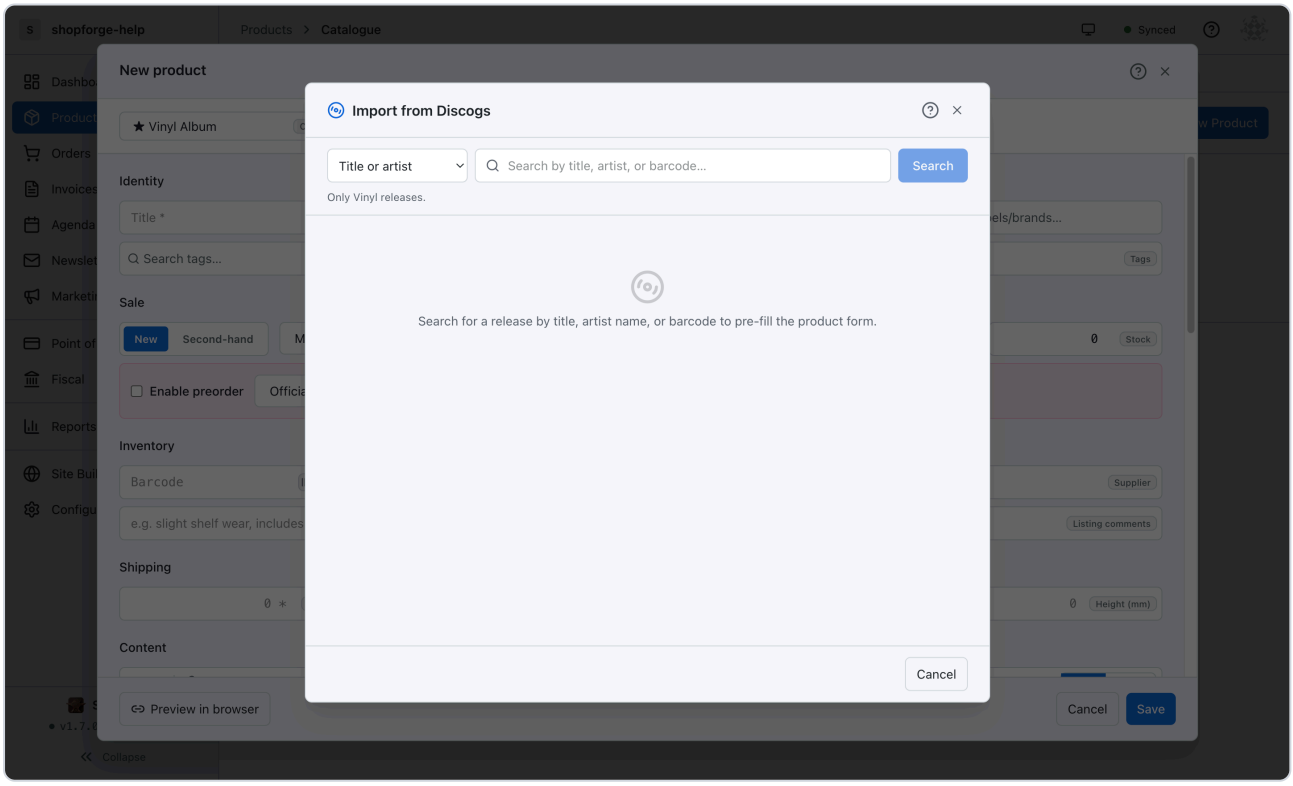
The French prompt and the English prompt are saved separately. Saving, resetting and generating need a connection to the server; offline, the window still opens with the shipped parts.

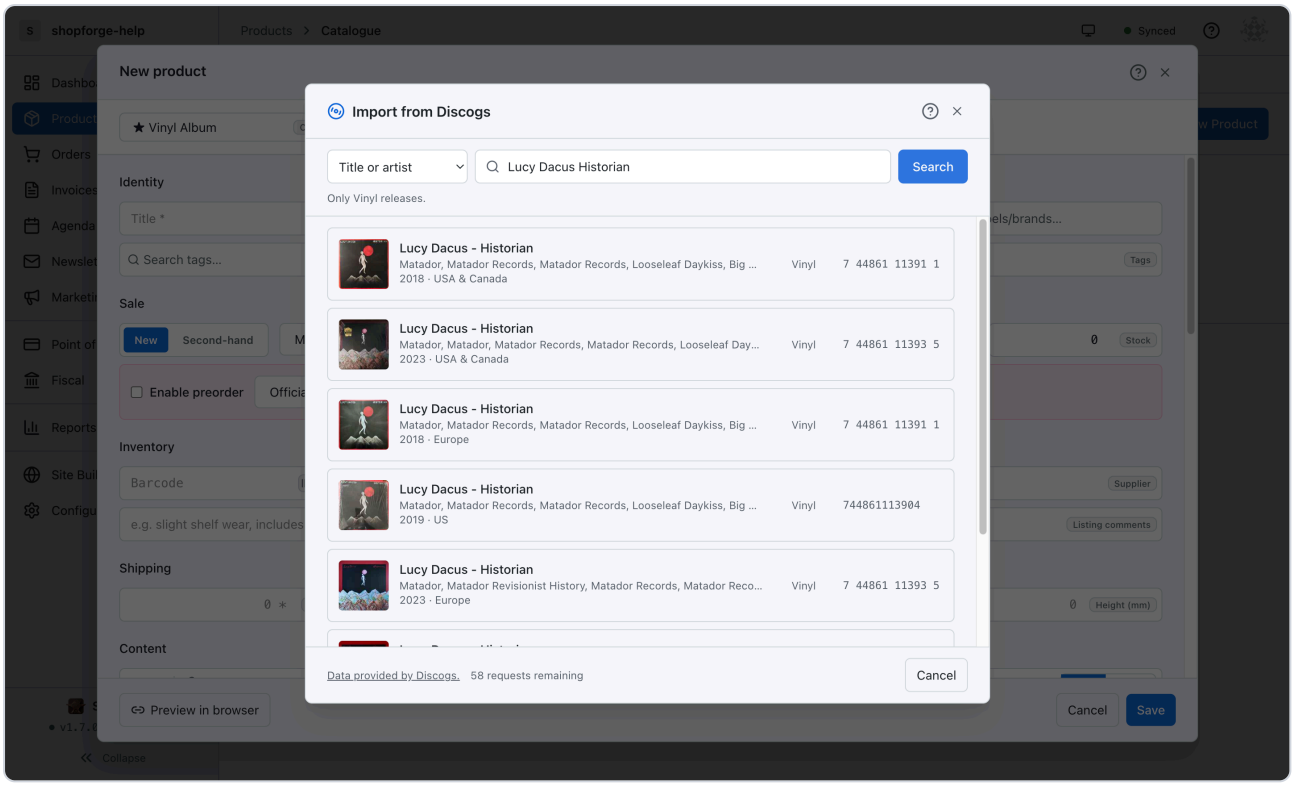
Import from Discogs

For **new** products in **music** categories (requires the **Discogs** integration): select a music category first — **Import from Discogs** only appears once one is picked.



Import from Discogs searches the Discogs release database by **title, artist name, barcode or catalogue number**. Pick the mode in the **Search by** list; in **Title or artist**, a plain 8–14 digit string is treated as a barcode (spaces and dashes are ignored). The search lists only releases of the product's category: a Vinyl product shows vinyl releases, a CD product only CDs (a note under the field says so).





If nothing matches, the modal says "No release found for “{query}”. Check the spelling, or search by catalogue number or barcode." (with the text you searched for); the line "Search for a release by title..." only shows before your first search.

Pick a release — "Load more results" fetches further pages, and the remaining request quota is shown. The selected release **pre-fills the product form** (title, artists, style attributes, images, barcode...); review and complete before saving.

When you save the product, the artists and labels the release names are matched to your own: by Discogs ID first, then by slug, then by name. A match by slug or name without a Discogs ID takes the ID; one with a different ID is another artist or label with the same name, so a second one is created. Each artist and label is then **completed from Discogs after the save**, which does not wait for it: only **empty** fields are filled, never overwritten. The website, the images (only if there are none) and, when an AI is active (**Configure → Integrations → AI**), a biography or description with the country, written from the Discogs profile and marked **Description generated by AI**. Without an AI, or if it fails, the website and images are still filled and the text stays empty. "Various" is skipped. If the app closes before it ends, the next import naming the artist or label finishes the empty fields.

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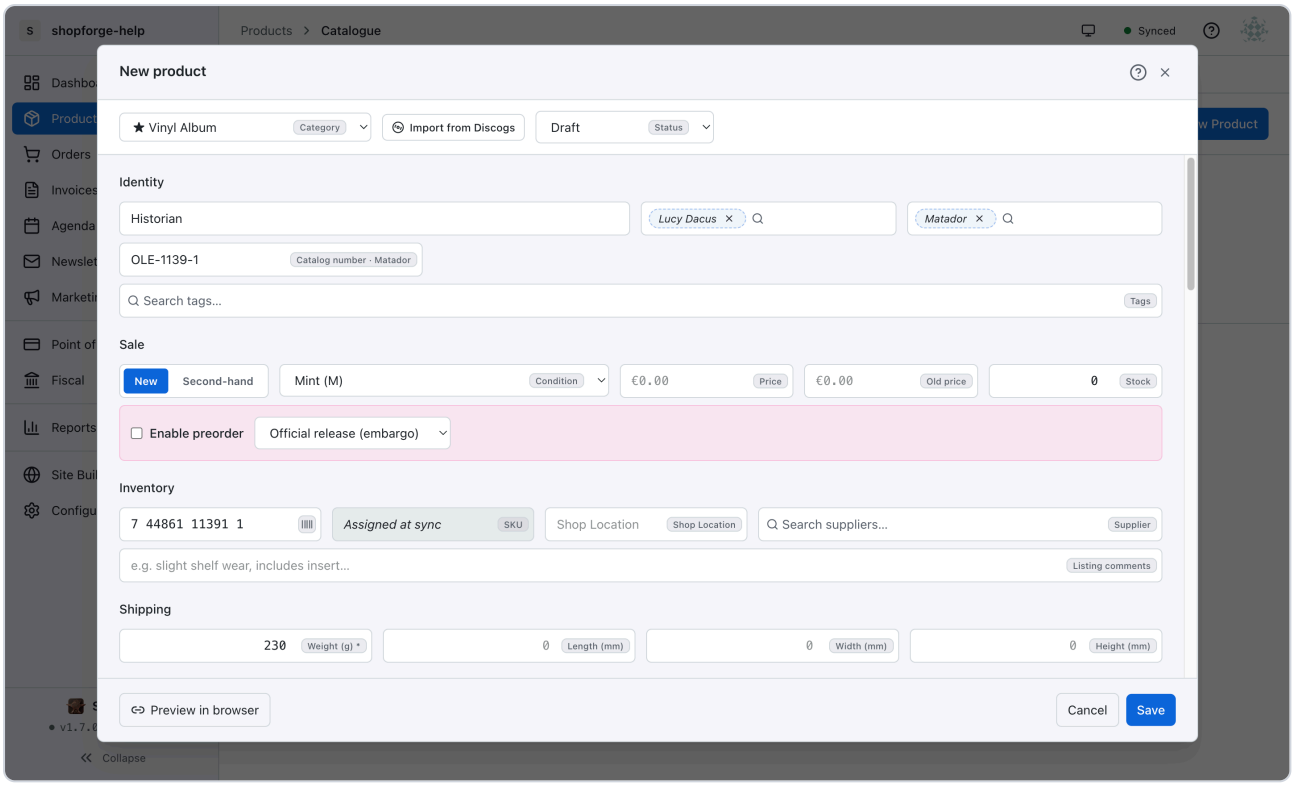
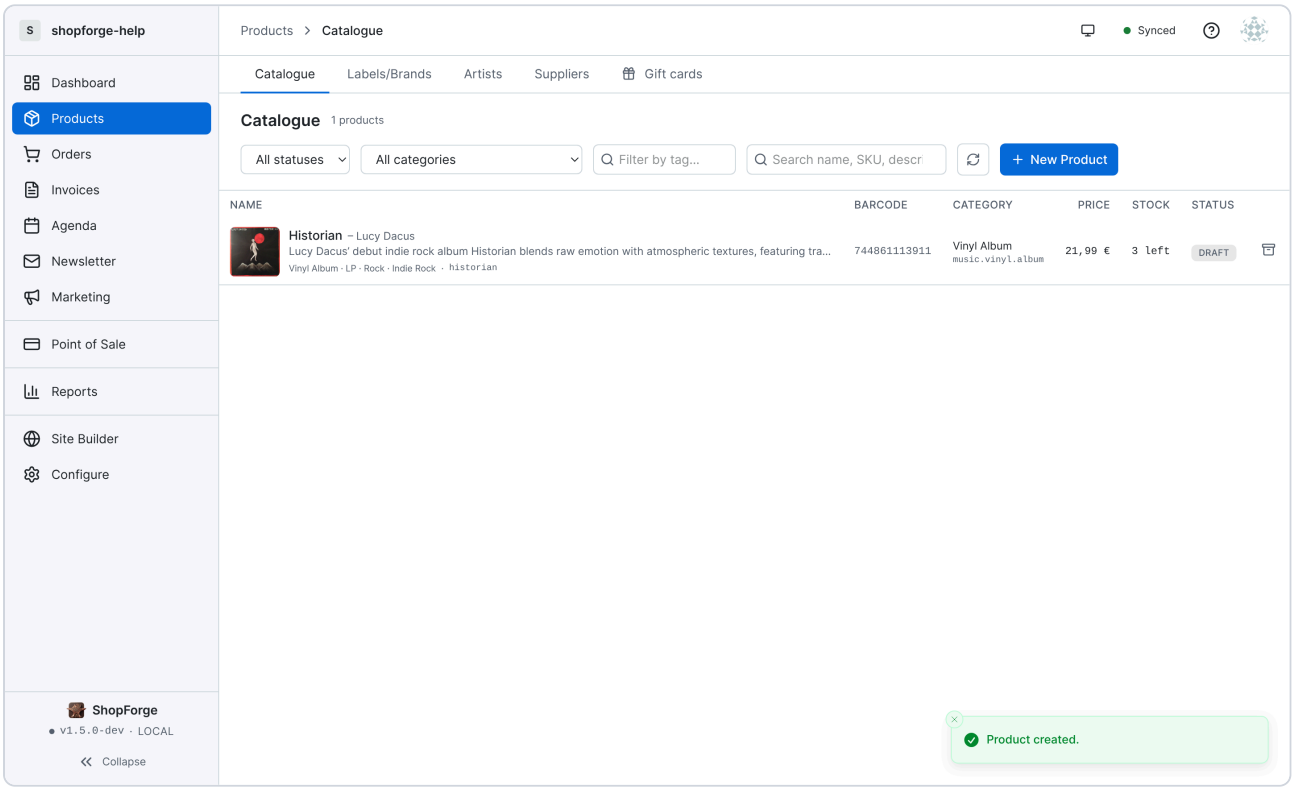




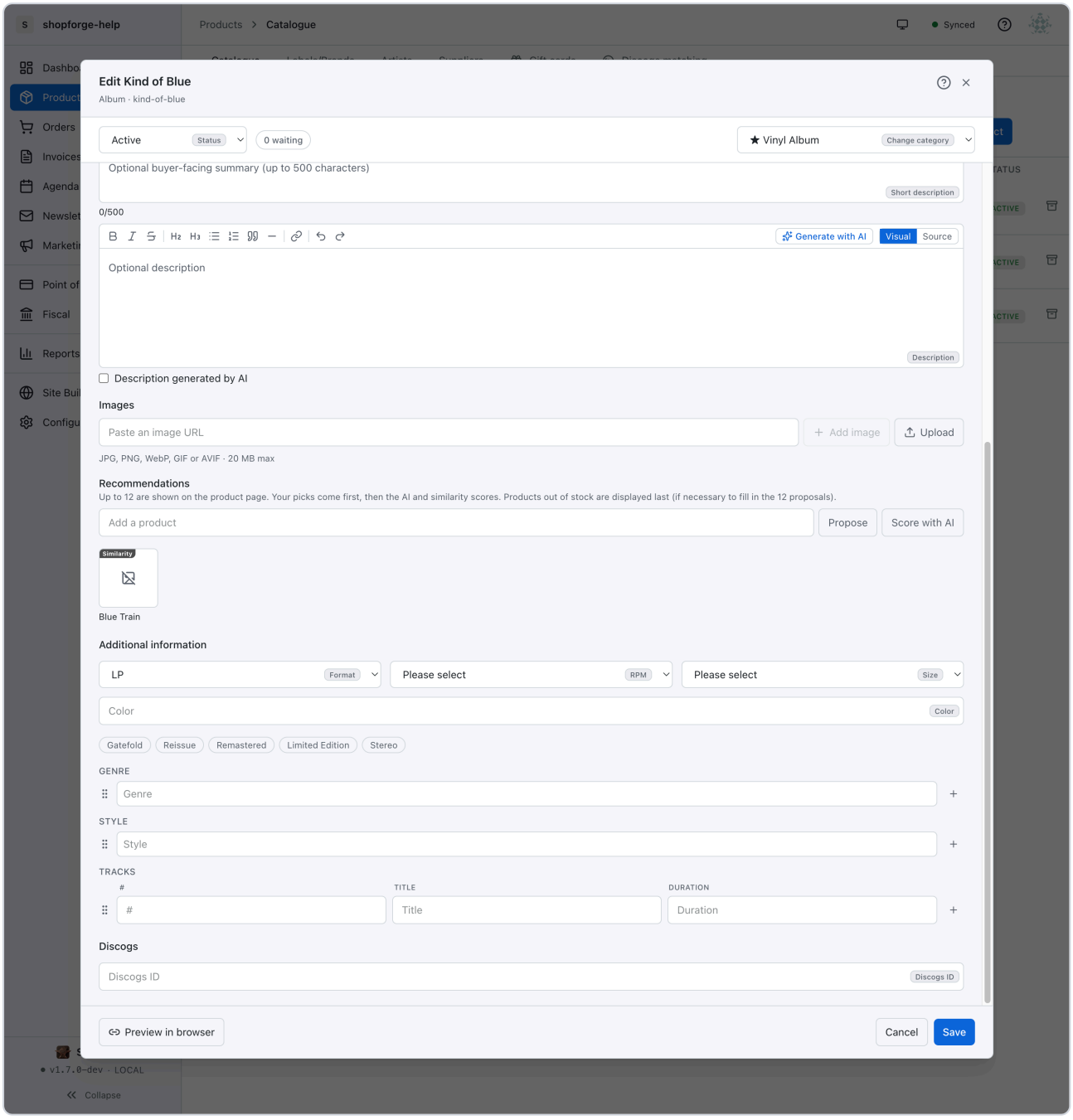
The footer of the results shows **Data provided by Discogs.**, a link to the same search on Discogs, next to the remaining request quota.

Discogs on the product

When your shop sells on Discogs, the product form carries what a Discogs listing needs. The connection itself, the channel settings and the lists of listings to adopt or publish are in Discogs

sales (administrators); connecting your Discogs account is in Integrations. Only products in **music** categories can be sold on Discogs.

The Discogs fields of a copy



In a music category the **Discogs** group of the form shows the **Discogs ID** of the copy. When your administrator has enabled the Discogs channel (**Configure → Integrations → Discogs**), it also shows these fields for the copy, whether or not it is on Discogs yet:

- **Sell on Discogs** — tick it to publish this copy on Discogs and keep it up to date there. Untick it and its Discogs listing is set to Draft.
- **Discogs price** — leave it empty to use the listing price ("Empty = the listing price").
- **Discogs comment** — the comment buyers read on Discogs, up to 1,000 characters.

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- **Offers** — **Channel default**, **Allow offers** or **No offers**.
- **Sleeve condition** — optional; the sleeve's grade on Discogs' scale. For a CD, DVD or Blu-ray it describes the case.

The copy's own **Condition** is the media grade sent to Discogs. Vinyl and cassette take Discogs' own grades; CD, DVD and Blu-ray keep their five grades, which Discogs receives as its matching grades.

If the product has several variants, a note says that only the first is shown: "Showing the first variant. The others are edited in the variants editor, not available yet."

The pressing line

When the variant has a Discogs release, a line under its fields says whether it is the exact pressing. A release found by enrichment reads "Matched by enrichment: please confirm this is the exact pressing." with **View on Discogs ↗** and **Confirm pressing**. Check the release on Discogs, then choose **Confirm pressing**; the confirmation is saved with the product, offline too, and the line reads **Pressing confirmed**. Changing the release cancels the confirmation. A release set by an adoption is already confirmed. Until the pressing is confirmed the copy is not ready for Discogs; the Discogs matching tab confirms many at once.

The channel line

Once **Sell on Discogs** is ticked, or the copy is linked to a Discogs listing, a channel line under the fields says where the copy stands:

- **On Discogs · View listing ↗** — the copy is linked to its listing. If you have unticked **Sell on Discogs**, it reads "On Discogs as Draft · tick to put it for sale".
- **Not ready for Discogs:** followed by what is missing, updated as you type. The reasons are: not a music category, no Discogs release, pressing not confirmed, media grade not on Discogs' scale, sleeve grade not valid, price is 0, product is not active.
- **Not on Discogs yet** with **Put on Discogs** — the copy is ready and in stock but not published. When the channel publishes automatically, the line adds "publishes automatically". Choose **Put on Discogs** to publish this copy now; the line then reads "Publishing… the link appears here once Discogs confirms." and the link replaces it when Discogs answers. If nothing comes back, "Still waiting for Discogs. Close and reopen the product to refresh." appears.
- **Not on Discogs yet · no copy in stock to offer** — nothing to publish while the stock is 0.

Put on Discogs needs a connection, a saved product and an adoption already completed in Discogs sales, so nothing already on Discogs is listed twice; until then the line says "Complete an adoption first, so nothing already on Discogs is listed twice." or "Save the listing first." If Discogs refuses, "Discogs refused it: {reason}" appears. If an identical listing is already on Discogs, the line says "Already on Discogs: link it instead" with **Open the adoption →**. In practice mode nothing is sent, and the line says "Practised: see the practice log →".

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Not ready for Discogs

With a Discogs seller account connected, the status filter offers **Not ready for Discogs**. It lists the products with a copy on the channel that fails the check. Under each product's row, a line gives the reasons, the same as in the channel line, and what Discogs said if it refused to publish. When nothing fails, the list says "Every listing on Discogs is ready." (when no search, category or tag narrows the list as well).

Discogs matching

The **Discogs matching** tab of Products (after Gift cards) lists the products that have a Discogs release, so you can confirm their pressings and put them on sale on Discogs, many at a time. It works offline: the changes wait in the outbox like any other edit.

Two filters narrow the list, and the count follows both:

- **Pressing**: **Not confirmed** (the default) lists a product while any of its variants with a Discogs release has an unconfirmed pressing; **Confirmed** lists the others.
- **Sell on Discogs**: **All** (the default), **Ticked** or **Unticked**, the tick of the copies' **Sell on Discogs** field.

Each row is the product as in the catalogue, with a line for the matched release (title, label and catalogue number, year, country) and a link that opens it on Discogs, then its Discogs state: "On sale on Discogs" only when the listing is for sale, "Ticked, not on sale yet" when a copy is ticked but its listing is a draft or not published yet (the pressing is not confirmed, there is no copy in stock, or it is waiting to be published), "Draft on Discogs" when unticked and linked; nothing when never listed. The release is read from Discogs: offline, the line shows "Discogs: release {number}" and the link. Choose a row to open the product, where a wrong release is corrected with the Discogs lookup; there is no reject button, and changing the release cancels its confirmation.

Check rows to act on them: the bar shows "{n} selected" with **Confirm pressing of selected**, **Sell selected on Discogs** and **Stop selling selected**. With no row checked, the bar offers **Confirm all pressings** and **Sell all on Discogs**, which act on every product of the filters, not only the rows shown. There is no "stop selling all": to take everything off Discogs, filter on **Ticked**, check the box above the list, and stop the selection. An action hides in the filter where it is already done, and a button whose action would change nothing is greyed out and says why.

Every action asks first, with how many products it changes and how many of them are published to Discogs now:

- **Confirm** sets the pressing as confirmed, as **Confirm pressing** does in the product form. A copy is not ready for Discogs until its pressing is confirmed.

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- **Sell** ticks **Sell on Discogs** on the product's unticked copies. The dialog says how many are ready for Discogs. When automatic publishing is on, the copies that are ready, in stock and not yet on Discogs are published now; when it is off (the default), the action publishes nothing: publish the ready ones from the **Publishing** card of Configure → Discogs sales (an administrator does it; an employee asks one). The others wait until they are ready.
- **Stop selling** unticks it: the Discogs listings are set to Draft. Nothing is deleted; tick them again to put them back on sale.

Link to a shop page

In the description and the short description, type `{slug:` to link to another object of the shop. A list opens at the cursor, headed **Link to...**, and narrows as you keep typing the name or slug. Each result shows its kind (**Product**, **Agenda**, **Artist** or **Article**), its name and its slug; when nothing matches, it says "Nothing found for “{query}”.".

- ↑ and ↓ move through the results and Enter picks the highlighted one; a click picks too.
- Esc, or a click outside the list, closes it and leaves what you typed as it is.
- Picking replaces `{slug:…` with a link whose text is the object's name, which you can edit. In the **Source** tab it is written `[Name](kind:slug)`.

The link stores the object, not a web address: the shop's pages work out the address when they are generated, so it stays right if the page addresses change. A link to an object that has no page (a draft or archived product, an unpublished event, an article) shows only its text, without a link.

Brands and artists

The **Labels/Brands** and **Artists** tabs list entries with a search box and a status filter.

Both forms list their fields in the same order: **Name**, **Slug** and **Status** on the first line, then **Tags**, then **Website** and **Country**, then the **Description** (Labels/Brand) or the **Biography** (Artist), then the **Images**.

- **Labels/Brand** — name, slug, status, tags, website, country, description, images.
- **Artist** — name, slug, status, tags, website, country, biography, images.

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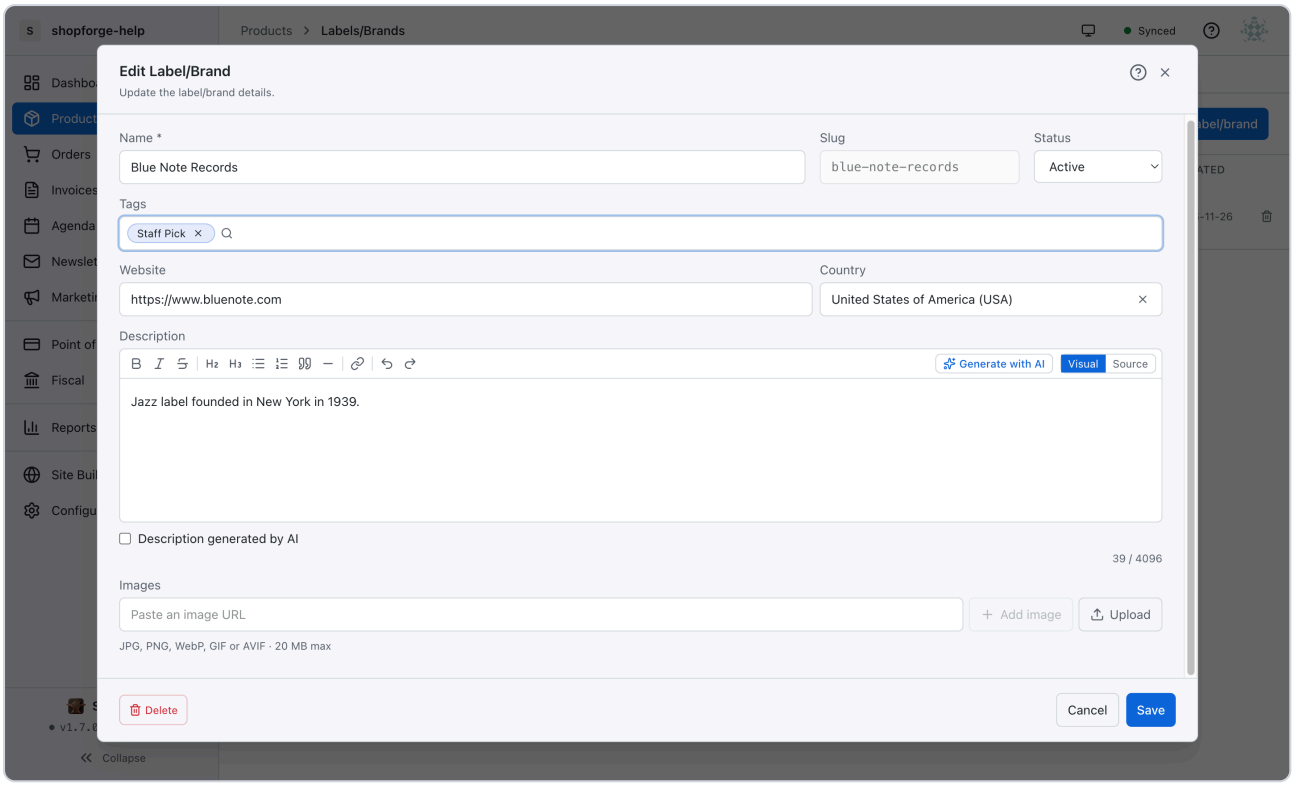

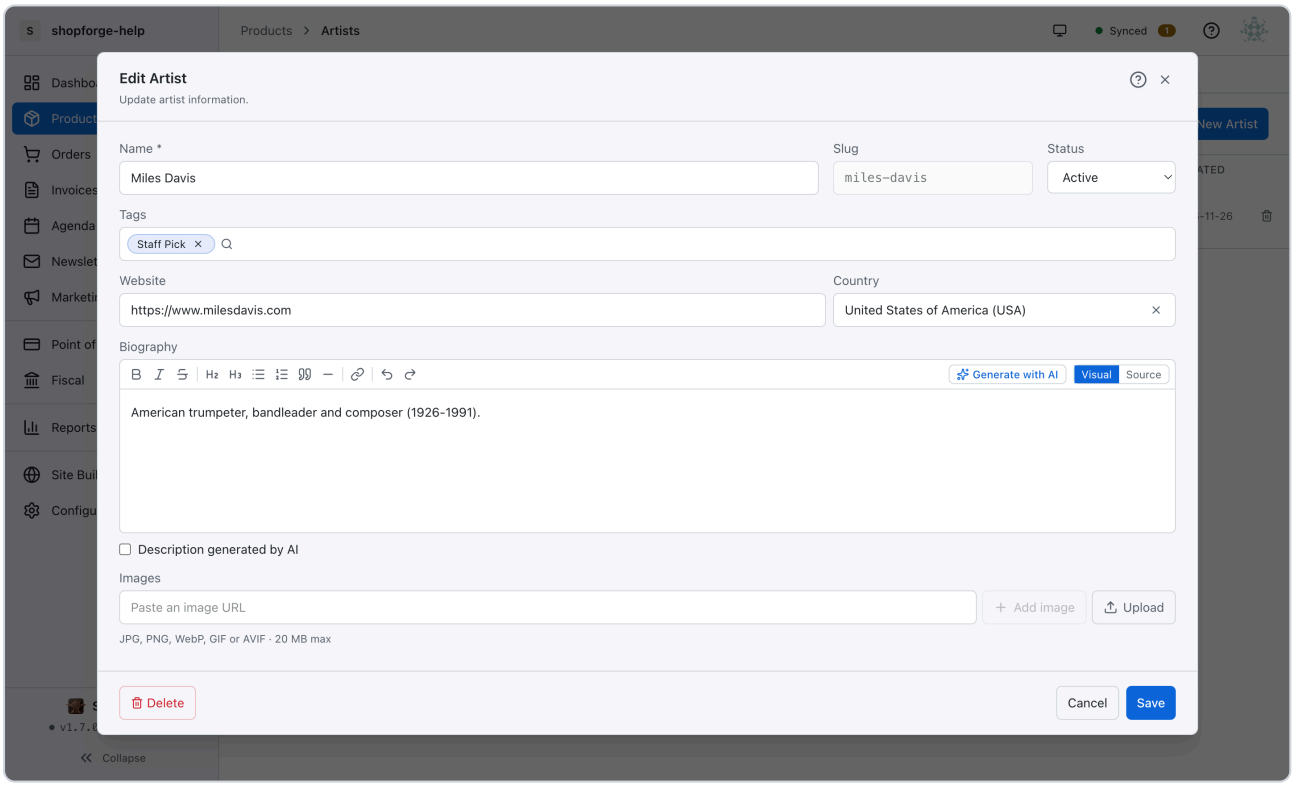

Both can be created inline from the product form or managed from their tabs. Their images are added the same way as a product's: see Images.

Under the biography or description, the checkbox **Description generated by AI** says the text was written by AI. It is ticked when AI generates the text, unticked when you empty the text, and you can tick or untick it yourself. While it is ticked, the artist's or label's page on your site shows a note under the text (set in the Artist hero and Brand hero sections).

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When your shop has an active AI (**Configure → Integrations → AI**), the biography or description editor has the **Generate with AI** button, as the product form does. It needs a name first. It opens the same window as for a product, with the artist or label prompt, which an administrator can save as their own. The AI is given the name and, when the entry has a Discogs ID, the Discogs profile. **Use this description** puts the text in the editor and ticks the checkbox; nothing is saved until you save the form. Without an active AI there is no button.

Archive a product

The row action **Archive** removes a product from sale after a confirmation: "This will archive "{name}". Stock will be set to zero." An archived product is not deleted: switch the list to **Archived**, open the product and set its status back to **Draft** or **Active**. Its stock stays at zero.

Related

- Suppliers — the Suppliers tab and the Supplier field
- Dashboard — low-stock and best-seller widgets
- Schema — admin — import the category taxonomy
- Integrations — admin — AI providers & Discogs

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Suppliers

A **supplier** is a wholesaler or distributor you buy your stock from. ShopForge keeps one record per supplier — who to order from, how, and on what terms — and lets you say which products come from which supplier.

Suppliers are **for you only**. A supplier never appears on the storefront, on the website, on a receipt or in anything a customer can see, and no page or search exists for it. It works offline like the rest of the catalogue: changes are saved on the register first and synced in the background.

> Recording a supplier does **not** order anything. There is no automatic ordering yet; the ordering details are a place to keep what your team needs when it orders by hand.

The Suppliers tab

Open **Products → Suppliers**. The list shows, for each supplier:

- **Name**, with the order contact under it,
- **Country**,
- **Channel** (Email, Phone, Web portal or API),
- **Lead time** in days,
- **Products**, how many products come from this supplier (see below),
- **Status** (**Active** or **Archived**),
- when it was **Updated**.

Use the search box to find a supplier by name (capitals and accents don't matter), and the status filter (**All statuses**, **Active**, **Archived**) to narrow the list. Archived suppliers stay in the list, dimmed. The list shows up to 200 suppliers; the banner "Showing {shown} of {total} suppliers" means you should narrow the search to find the others.

The **Products** column shows the number of products linked to the supplier that are not archived. Click the number to open the **Catalogue** on those products only: a **Supplier: {name}** chip appears next to the other filters. A supplier with no such product shows a plain **0**. When some of its products are archived, a smaller grey link **+3 archived** sits before the number; it opens the Catalogue on the **Archived** view for that supplier. Both links work with the keyboard and do not open the supplier. In the Catalogue, the **×** on the chip removes only the supplier (the status view stays); on an empty list, **Clear search** resets every filter, the chip included. Archived suppliers keep their counts, dimmed with the row.

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The columns share the width in fixed proportions; a long name is cut with an ellipsis, and in a narrow window the table scrolls sideways.

Click a supplier — or press Enter on it — to open it. **New supplier** creates one. Refresh forces a sync with the server.

Creating and editing a supplier is for administrators. Every employee can open the list and read a supplier, but the **New supplier** button and every editable field are shown to administrators only. Ask one to add or change a wholesaler.

Create or edit a supplier

Administrators. Only the **Name** is required. The name must be unique in your shop: two names that differ only by capitals or spacing count as the same ("Acme Wholesale" and "acme wholesale"), and creating a second one is refused.

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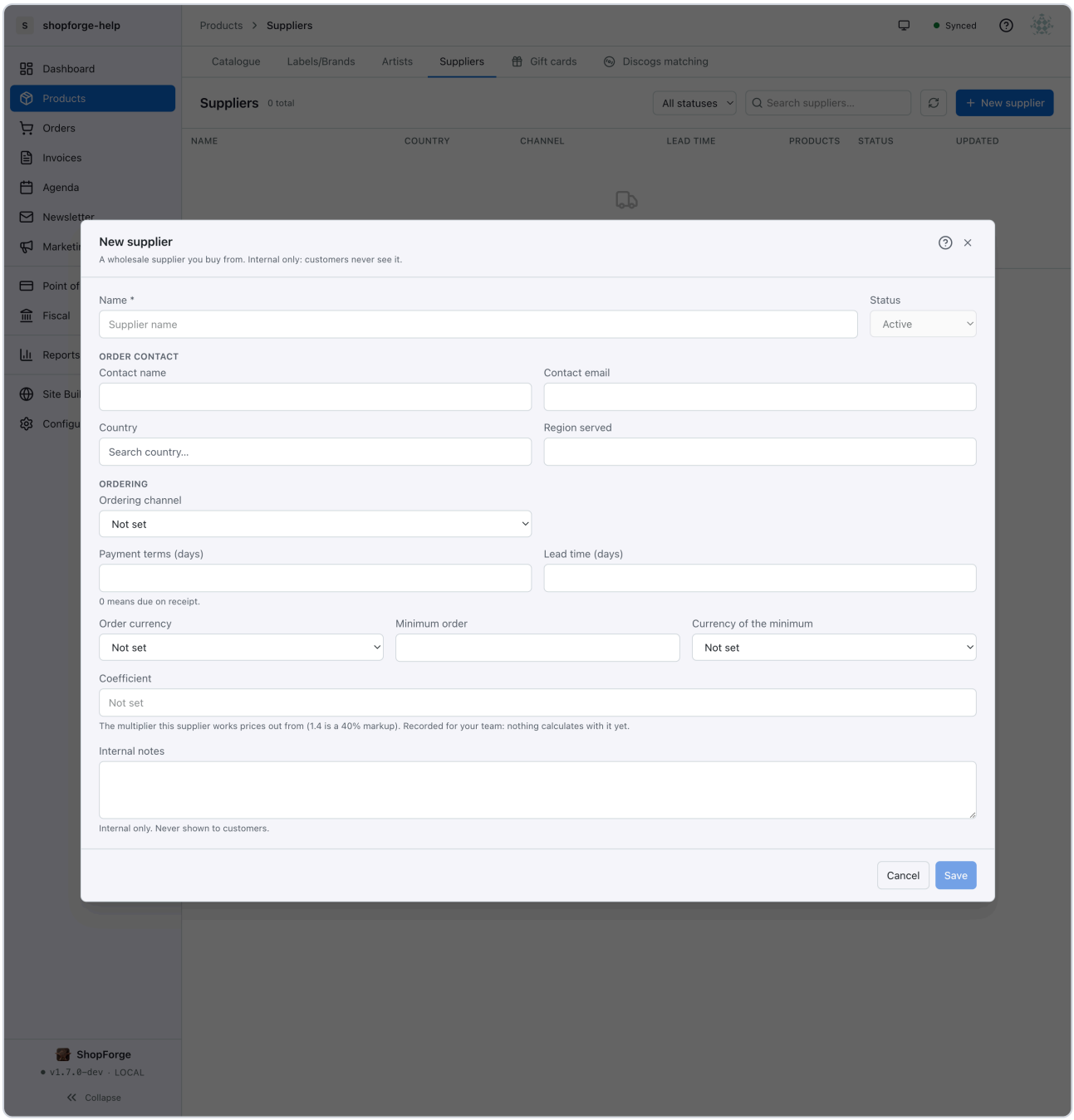

The form reads top to bottom:

- **Name** and **Status**, on the first line. A new supplier is **Active**, and the field is locked.
- **Order contact** — **Contact name**, **Contact email** (who to write to when you order), then **Country** and **Region served**.

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- **Ordering**:
  - **Ordering channel** — **Email**, **Phone**, **Web portal** or **API**, or **Not set**. **Portal or API address** appears beside it (and is required) only for **Web portal** and **API**. It must be a web address starting with `http://` or `https://`, without a login or password in it. Choosing **Email** or **Phone** removes the address. Nothing below it moves when it appears.
  - **Payment terms (days)** — a whole number of days; `0` means due on receipt. **Lead time (days)** — a whole number of days between ordering and delivery.
  - **Order currency** — the currency you are invoiced in. **Minimum order** and **Currency of the minimum** — type the amount as you would write it (`250` or `250.50`; a comma works too), with no more decimals than the currency has.
  - **Coefficient** — the multiplier this wholesaler works prices out from, as a number: `1.4` is a 40% markup. Up to three decimals, and it may be left empty (**Not set**). It is a note for your team: nothing in ShopForge calculates with it yet, so it will not change any price on its own.
- **Internal notes** — free text, for your team only.

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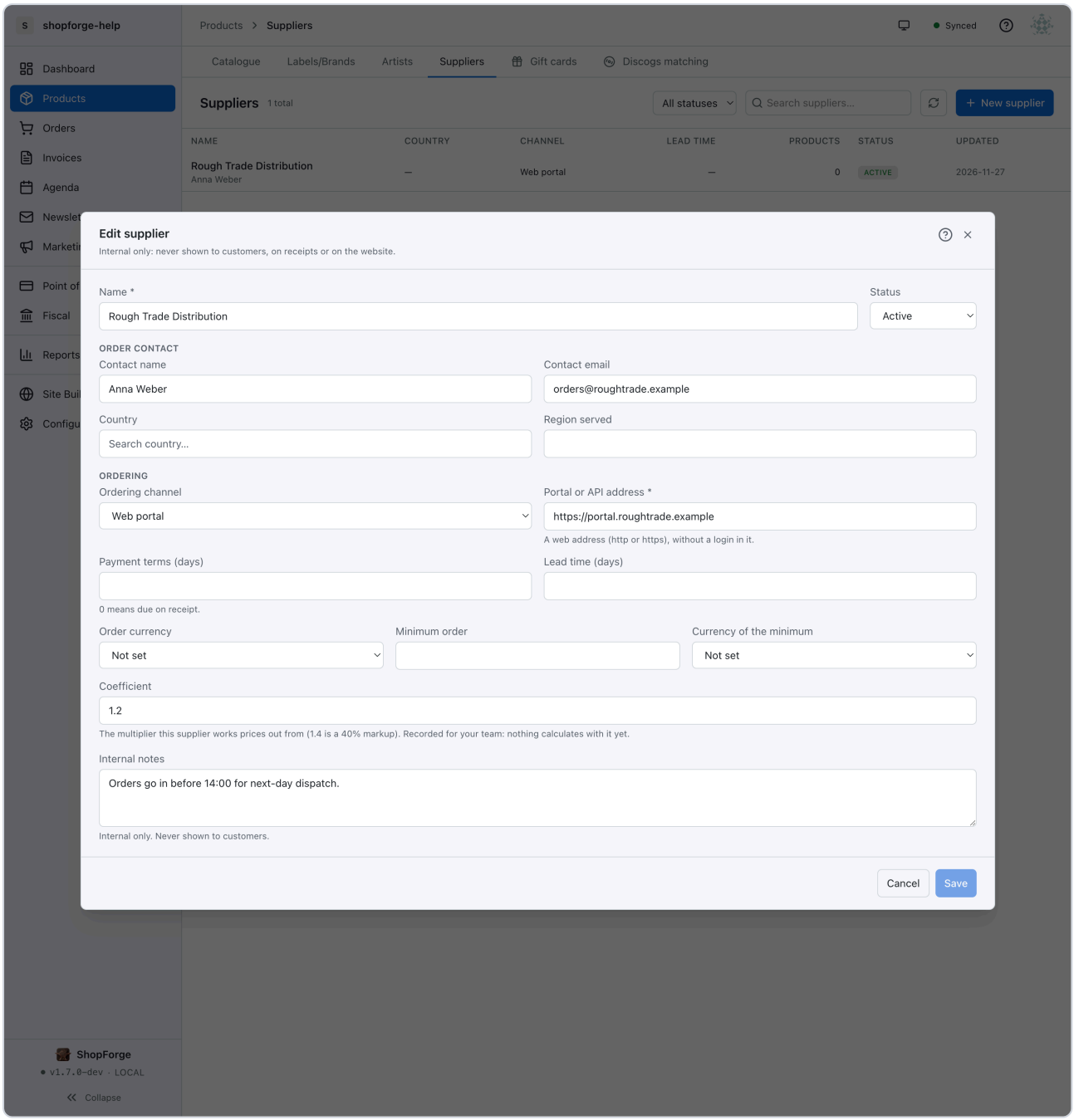


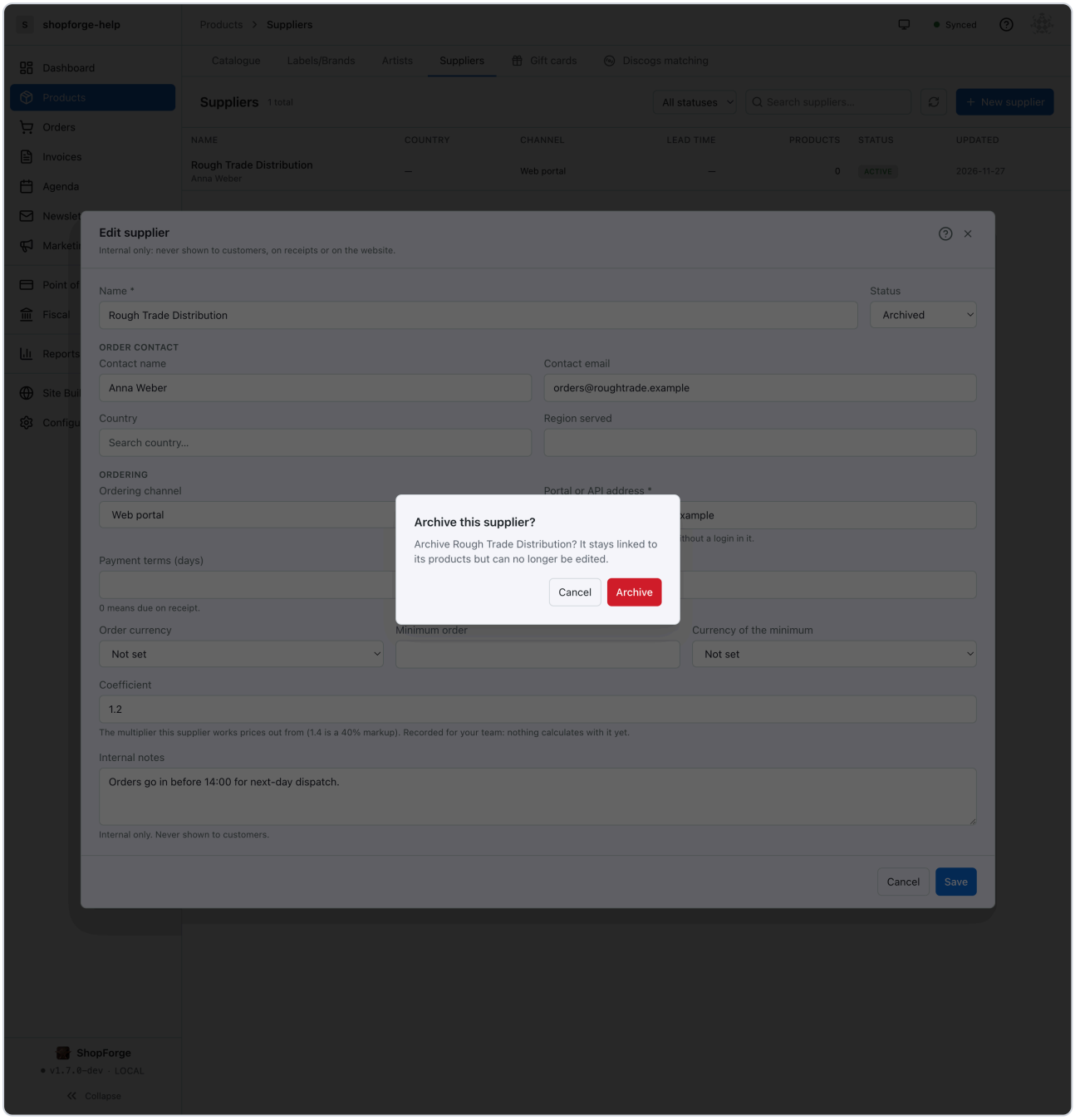
Save with **Save**. If something cannot be saved, the field is named in the message ("Minimum order: ...") and nothing is queued.

An employee opening a supplier sees the same fields greyed out, with a notice that only an administrator can create or edit one. Nothing they can do on that screen will change the supplier.

Archive a supplier

Archiving is for **administrators**, and it is done with the **Status** field: open the supplier, set **Status** to **Archived** and press **Save**. Nothing happens until you save. Save then asks for a confirmation: "Archive {name}? It stays linked to its products but can no longer be edited." Confirm, and the changes you made in the form and the archiving are saved together. **Cancel** in that question keeps the form open with **Status** still on **Archived**, and saves nothing; set **Status** back to **Active**

to leave the supplier as it is. For other employees, and for a supplier that is already archived, **Status** is locked.



- An archived supplier **keeps its links** to products, appears dimmed in the list, and opens read-only with a notice.
- It **cannot be edited** any more, and its **name stays reserved**: you cannot create another supplier with that name.
- There is no way to un-archive it from the app.

Suppliers on a product

The product form has a **Supplier** field in its **Inventory** group, after the barcode and the SKU (its label can be changed per category, see below). Search to pick a supplier and remove one with

the × on its chip. The changes are saved with the product. Linking a supplier to a product is something **every employee** can do — only the supplier itself is reserved for administrators.

- The search offers **active suppliers only**. A supplier already linked to the product stays on the form, archived or not, and can be removed.
- **Administrators** can also type a new name and choose **Create "{name}"** to add a supplier on the spot. For an employee that option is not offered: the field finds existing distributors only, so a new one has to be created on the **Suppliers** tab first. A hint under the field says so.
- A new name that **matches an existing active supplier** (capitals and spacing aside) links that supplier instead of creating a second one.
- A new name that belongs to an **archived supplier** is refused when you save, with "A supplier named … already exists and is archived. Choose another name." Nothing from the product is saved in that case — fix the name and save again.
- A supplier created this way is saved with its name only; open it from the **Suppliers** tab to add its ordering details.
- Offline, the supplier is created first and then linked, in that order, when the register reconnects.
- The catalogue grid does not show suppliers; open the product to see them.
- **Second-hand** copies are bought from a private person. Choosing Second-hand on a product replaces its suppliers by **Private seller** and turns the supplier search off; choosing New again removes **Private seller** and the search works again, empty. The cost you enter on **Private seller** is what you paid for the copy. **Private seller** is not in the Suppliers tab and cannot be edited.
- **Enter the cost of every second-hand copy.** VAT is due on the margin, the price less this cost. A copy sold without a cost takes the shop's default purchase cost, a percentage of its sale price set in Fiscal settings (0 % unless set): at 0 % it is taxed on its whole price, as the law requires when nothing proves what you paid. Keep a purchase document for each copy (what you paid and to whom) and your police register (*livre de police*).

Hide or rename the field

Administrators. The **Supplier** field is one of a category's standard attributes, like Labels/Brand and Artist. In the tenant schema a category can give it another label (for instance "Distributeur" or "Wholesaler") or hide it entirely (`standardAttributes.supplier`), see Schema. For a category that hides it, the field is not shown on the product form and the product's supplier links are neither read nor changed.

Related

- Products

- Schema — admin — relabel or hide the Supplier field
- Offline & synchronization

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Product recommendations

Each product can carry a list of **recommended products**. The storefront shows it on the product page, in the *Recommended products* section. You edit it in the product form, in the **Recommendations** section.

What the list holds

- Up to 12 products are shown on the product page. The list can hold more; the rest is folded under **Show n more**.
- Each entry carries badges for where it comes from: **Staff** (you placed or added it), **AI** (scored by the AI) and **Similarity** (proposed by the similarity engine). Hover **Similarity** to see what the two products have in common.
- The order is: your picks first, then the AI score, then the similarity score. Dragging or moving an entry sets its place and makes it one of your picks.
- Products that are out of stock are shown last, and only when they are needed to fill the 12 places.
- Gift cards, donations and memberships have no recommendations.

Add, reorder, remove

- **Add a product** searches the local catalogue.
- Drag a tile, or use its Move earlier / Move later buttons, to reorder the list.
- **Remove** takes a product out of the list and remembers it: it is not proposed again for this product.
- Nothing is sent until you save the product. The list is saved with it, like any other field.

Propose

Propose fills the free places of a saved product from the catalogue on this computer: products that look alike (artist, label, genre, style, year, category). It works offline. The first use in a session builds the index and takes a moment. The products you placed or removed are left alone.

For a category that is bought once (hi-fi equipment, for example), Propose suggests accessories instead of similar items, from the table set under **Configure → Integrations → Recommendations**. While that category has no accessory category listed there, Propose suggests similar items, like any other category.

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Score with AI

Score with AI asks an AI provider to rank the proposals. It needs a connection and the shop's AI, with its API key (**Configure → Integrations → AI**). Without one, the button says "No AI is configured for the shop."

- Only product data is sent (title, artist, year, label, style, category). Never customer data.
- It is one call per product. It only sets the **AI** score: your picks stay first.
- If it fails, the list stays as it was and the message says why.

Score many products with AI

Products without a list get their similarity proposals by themselves, in the background (see below). There is no button to press for that. What you can start is the AI scoring of many products at once.

On the products page, **Score with AI** appears when the shop has an AI configured and at least one product is left to score: a product whose list has entries and no AI score yet (gift cards, donations and memberships are left out). Offline it is greyed out: "Needs a connection and an API key."

Click it. The window **Score recommendations with AI** says "The AI scores the recommendations of n products in the background. You can keep working and follow the progress at the top of the window." It shows the estimated cost ("free tier (for now)" where the model costs nothing; "the cost of this model is not known" where ShopForge has no price for it) and **Max AI calls**, a whole number, 1 or more, that starts at the number of products. The API key is checked when the window opens, and the reason is shown if it cannot be used. **Start** begins the run and closes the window; **Close** leaves without starting.

The run goes on in the background, also when you leave the page and after you restart the app, within what is left of **Max AI calls**. Your picks keep their rank: the AI scores the other entries. A product that was scored in the meantime, by hand or on another computer, is not sent again. If the connection is lost, the run waits and goes on by itself. An error on one product is counted ("n AI failures") and the run goes on.

Follow it in the top bar, next to the sync indicator: **AI scoring done/total**. Click it to see "Scoring recommendations with AI: n of n products.", the estimated cost and the failures. **Stop** asks "Stop after the products in progress?" (**Stop** or **Continue**): the products already scored keep their scores. When the run ends, the indicator stays until you click **Dismiss**, and says one of:

- "Finished: n products scored."
- "Stopped: n of n products scored." (you stopped it, or **Max AI calls** was reached)
- "Stopped: No API key for ..." or "Stopped: The provider refused the key."

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While the run waits for the connection, the popover says "Waiting for the connection...". While a run is going, **Score with AI** opens the window on its progress.

In the background

There is no switch and nothing to do: after a sync, or when the computer has been idle for a minute, this computer proposes similar products for the products without a list, 200 at most per run. It stays on this computer: nothing is sent to an AI. The lists are saved like any other change and synced with the next sync.

Settings

Under **Configure → Integrations → Recommendations** (administrators): the shop's AI ("Shop's AI: provider, model", with **Change it in the AI tab**; the provider and its API key are set in the AI tab, and without them the panel says no AI is configured), the scoring instructions (with their version, and **Reset to default**, which asks you to confirm) and the categories that go together (**Goes with**, **Bought once**). Save with **Save**; the page confirms "Recommendation settings saved."

Offline

Propose and the background proposals work offline. **Score with AI** needs a connection to start; a run that is going waits while you are offline and goes on when the connection is back. Changes are synced when the connection is back.

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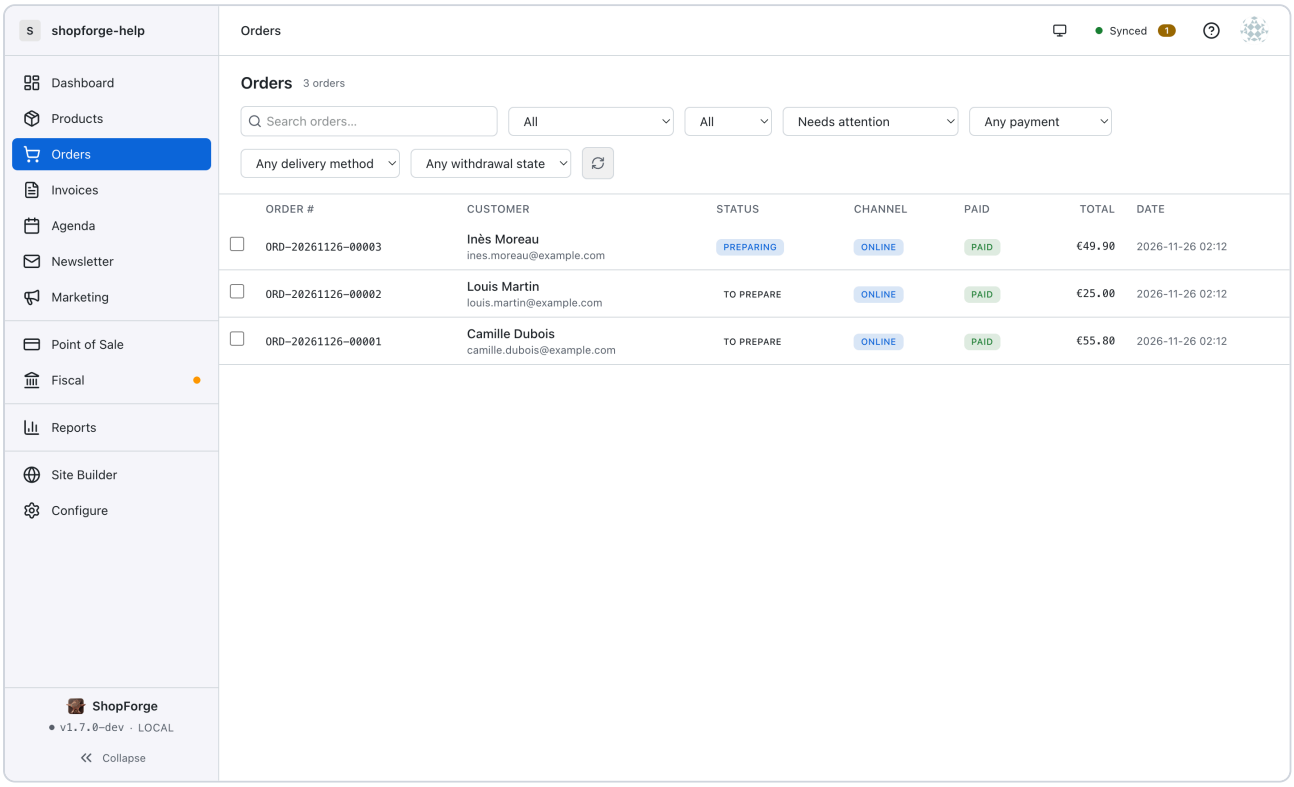
Orders

One place to handle every order — online and in-store — from received to delivered or collected. The order list reads from the local copy of your shop data, so browsing orders works even offline.

The order list



Open **Orders** from the sidebar. Filters at the top:

- **Status** — any of the order statuses (below).
- **Channel** — Online, POS or Discogs, which shows only your Discogs orders (see Discogs orders).
- **Needs attention** — **VAT or invoice to check** for every shop, and the Discogs choices once a seller account is connected; see Flags in the list.
- **Payment** — Any payment, Payment pending, Paid, Disputed, Partially refunded, Refunded. **Disputed** finds the orders whose PayPal payment the customer is contesting: each one needs an answer to PayPal in time (see A disputed payment).
- **Fulfilment** — Any delivery method, Pickup, Delivery.
- **Search orders…** — free-text search across order number, customer name, customer e-mail and phone number (prefix). Combined with the other filters above (AND).

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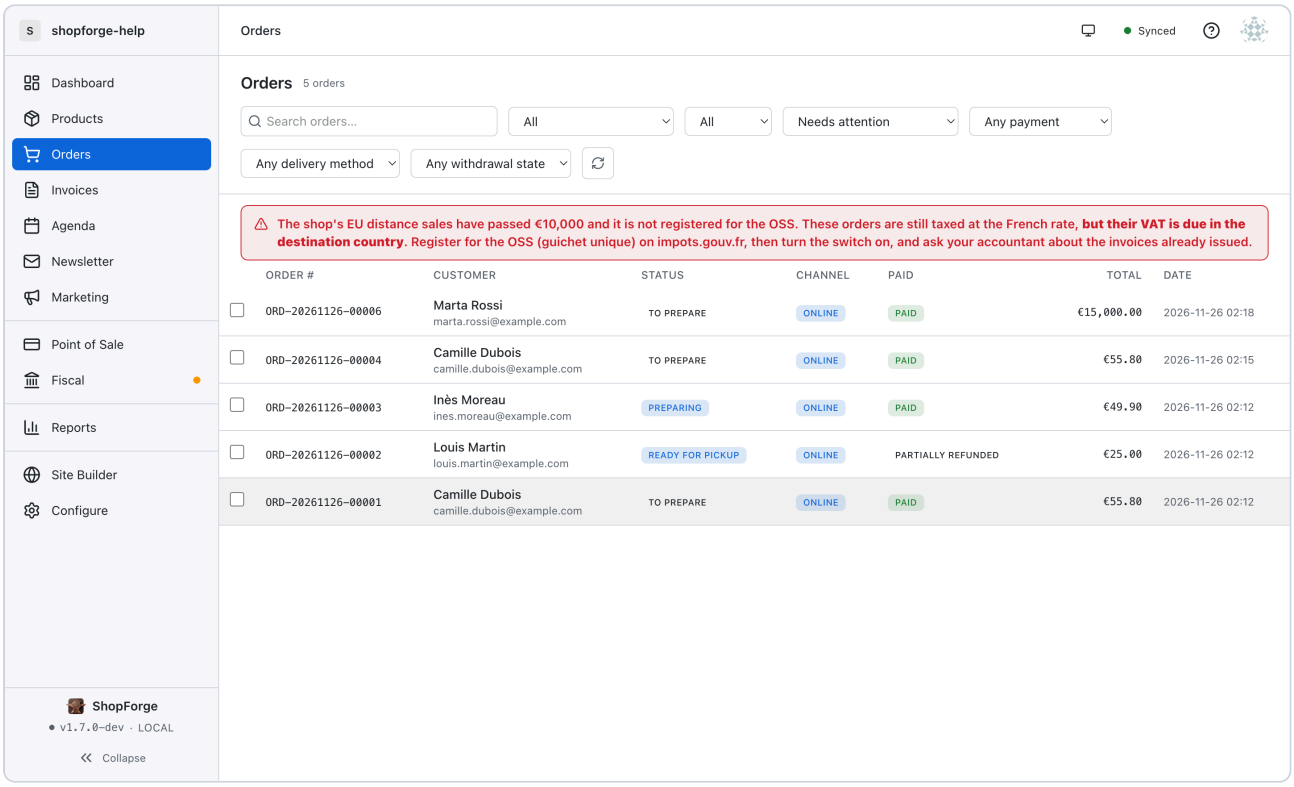
Each row shows **Order #**, customer (name + e-mail), a colour-coded **status** badge, the **channel** badge, a **payment-status** badge, the total and the date. A checkbox column lets you select rows for bulk actions.

The list stops at 200 orders — "Showing {shown} of {total} — refine your search to narrow down" invites you to filter further.

Order numbers are stable references: quote them in any customer contact and in the store.

A Discogs order can carry small flags under its number and an "Answer by" time: see Flags in the list.

When the shop's EU distance sales have passed €10,000 and it is not registered for the OSS, administrators see a red banner under the header: *The shop's EU distance sales have passed €10,000 and it is not registered for the OSS. These orders are still taxed at the French rate, **but their VAT is due in the destination country**. Register for the OSS (guichet unique) on impots.gouv.fr, then turn the switch on, and ask your accountant about the invoices already issued.* It goes away once the shop is registered; see VAT on distance sales.



Order statuses

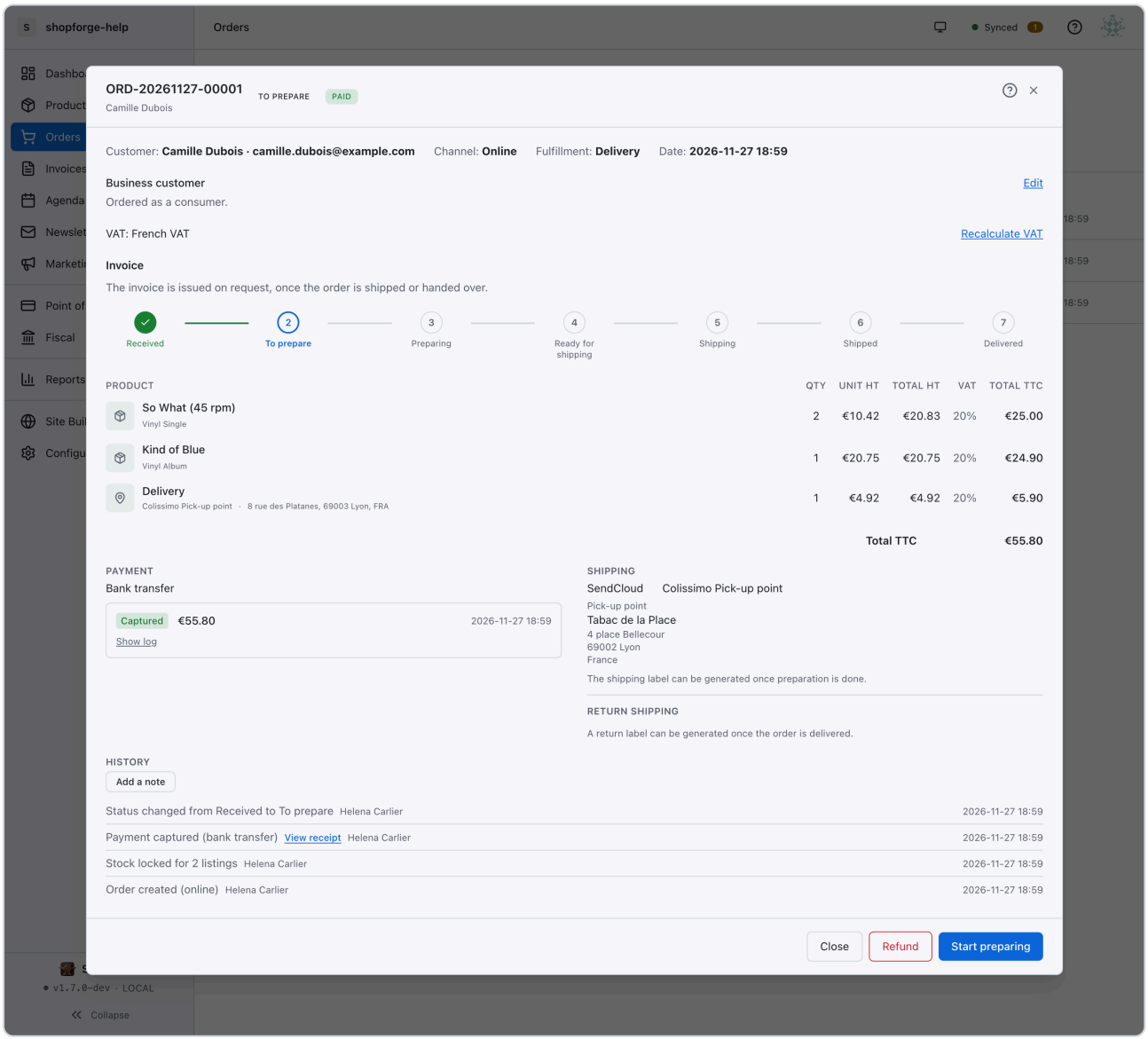
Every order follows a fixed progression. Status badges are colour-coded:

Status	Meaning
Received → Awaiting confirmation → To prepare	New orders, not yet confirmed.

Status	Meaning
Preparing	The shop is picking/preparing the order.
Ready for pickup (pickup orders)	Waiting for the customer; pay or collect.
Ready for shipping → Shipping → Shipped	Handed to the carrier.
Delivered (delivery orders)	Carrier delivered.
Completed (pickup orders)	Collected by the customer.
Cancelled	The order will not be fulfilled.

Delivery and pickup are *branches*: a pickup order never goes through shipping states, a delivery order never ends "completed".

Order detail



Click a row to open the order. The modal shows:

- **Fulfilment progress stepper** — a horizontal step bar showing which statuses the order has passed through and the current one.
- **Invoice** — the order's invoice and its credit notes: see Invoices and credit notes.
- **Items** — product, condition, quantities and HT/TTC prices. Clicking a product name drills into the product editor. A donation line reads **Outside the scope of VAT** in its VAT cell, and its excl. VAT amount is its amount including VAT. A second-hand line is taxed on its margin: its **Unit HT** is its price less the VAT on the margin, per unit, and when the order has one, a **Margin TTC** column between Qty and Unit HT shows each second-hand line's margin (its price less its purchase cost). The margin reveals what the shop paid, so it appears only here: never on the invoice, the receipt, the customer's account or the e-mails.
- **Totals** — the **Total TTC**. Once something has been refunded, the totals read in three columns, **Ordered**, **Refunded** and **Net**, with a row for the **Products subtotal excl. VAT**, the **Delivery excl. VAT** (when the order has a delivery fee), the **Taxable base excl. VAT**, one **Total VAT** row per rate, and the **Total TTC**. Each column adds up. When a refund was made as an amount alone, with no lines, its split into excl. VAT and VAT is not known: the Refunded and Net cells of those rows show **—** (a tooltip on the dash says why), and the Total TTC row stays right. A donation and a gift card are outside the VAT rows: they are not in the Products subtotal, the Taxable base or the VAT rows, and each has its own row, **Donations, outside the scope of VAT** and **Gift cards, VAT due when used**. The Total TTC includes them, and a refunded donation or card lowers its row, never a VAT row.
- **Fulfilment** — pickup or delivery, pickup deadline, tracking number, and an amber **POS transfer open** badge when a transfer is in progress. Delivery orders also show carrier name, shipping status, label and tracking URL.
- **Discogs details** — a Discogs order adds its own lines to the order: see Discogs orders.
- **Payment** — the payment method and, for online orders, the live payment records (online only) with a provider badge, card/wallet instrument, status, amount and reference. For a PayPal payment, the reference is a link to the transaction in your PayPal account (**Open in PayPal**). It opens in a new tab; sign in to PayPal if it asks. If store credit was applied at checkout, the amount is shown above the payment records.

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- **Business customer** — for an order placed for a business, the company name, SIREN or SIRET, VAT number and purchase order reference the customer gave at checkout; an order for a consumer reads *Ordered as a consumer.* Click **Edit** to add or correct them. The checks are those of the checkout (a valid SIREN or SIRET, a VAT number of the form FR12345678901, a reference of at most 50 characters), and emptying the company name and the SIREN or SIRET removes them. A company billed outside France gives its VAT number, required, instead of a SIREN or SIRET (see Invoices). An order for a business labels its billing address **Company billing address**, and one without details starts from the company its customer keeps. The edit works offline and is sent when you are back online. Once an invoice is issued for the order the details are read-only: the invoice keeps what the order held when it was issued, and never changes. If the invoice was issued elsewhere before your edit was sent, the order shows the details the server kept.
- **VAT** — for an online order, the line **VAT:** with the treatment applied to it, the flags that ask for a look, **Recalculate VAT** and, for an export, **Proof of export**: see VAT of an online order.

Order history

The **History** section at the bottom of the order detail shows a log of every event — status changes, cancellations, POS payments (with a **View receipt** link for in-store payments and for the payment of a web or Discogs order), stock locks and refunds. Each entry shows who performed it and when; a user who has since been deleted shows as **Former employee**.

Advance an order

The action buttons follow the current status and the fulfilment branch:

- **Pickup:** Confirm → Start preparing; the order then becomes ready and completed item by item (see *Prepare a pickup order item by item* below)
- **Delivery:** Start preparing → Mark ready to ship → Hand to transporter → Mark shipped → Mark delivered
- For a delivery order **without** an integrated shipping provider, the **tracking number** is required before the order can be marked *ready for shipping* — type it in the tracking field (it is sent with the transition). On a Discogs order, also pick the **Carrier**.
- For a delivery order on an integrated shipping provider, a **shipping label** must be generated first (see **Shipping** below); a tracking number is not entered manually in that case.
- Status changes are written locally first and synced in the background. If another device changed the same order meanwhile, the sync surfaces a conflict and the order fails its transition — retry after a refresh to keep the server state.

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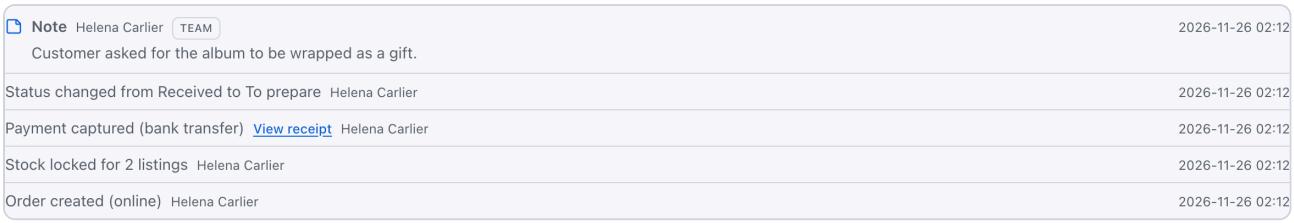
Notes on an order



Every order has a notes area under **History**. A note is a short text (up to 2000 characters) that you or a colleague add to the order, with your name and the time. Notes and the system's own events are listed together, latest first.

Add a note for the team

1. Open the order and click **Add a note**.
2. Type the text. The counter shows how many characters are used out of the maximum.
3. Leave **Send to the customer** unticked and click **Add note**.

A team note is **visible to the team only**: the customer never sees it. It works offline: the note shows **Waiting to sync** until the connection returns. If the server refuses it, the note shows **Refused by the server** with a **Copy text** button so you can write it again.

Send a note to the customer

1. Tick **Send to the customer**. The button becomes **Add and send to the customer**.
2. Click **View the e-mail** to read exactly what the customer will receive: the shop's e-mail text with your note in it, nothing else.
3. Click **Add and send to the customer**.

The e-mail goes first and the note is saved only if it went: a note you could not send is never saved by surprise. If the e-mail cannot be sent you read why ("The e-mail could not be sent", "E-mail sending is not set up for the shop", or the order has no e-mail address), and the text stays in the box so you can send it again or save it for the team. Sending needs a connection. A sent note shows **Sent to the customer** with the date.

The text of the e-mail around your note is edited in **Configure → Emails** ("Note sent to the customer"; administrators). Write `{{note}}` where your note should appear; if a template leaves it out, the note is added at the end.

Prepare a pickup order item by item

A pickup order does not have to be ready all at once. In the order detail, a pickup order that is being prepared shows two columns next to each line: **Ready** and **Collected**. An item is in one of three states: waiting, ready, or collected.

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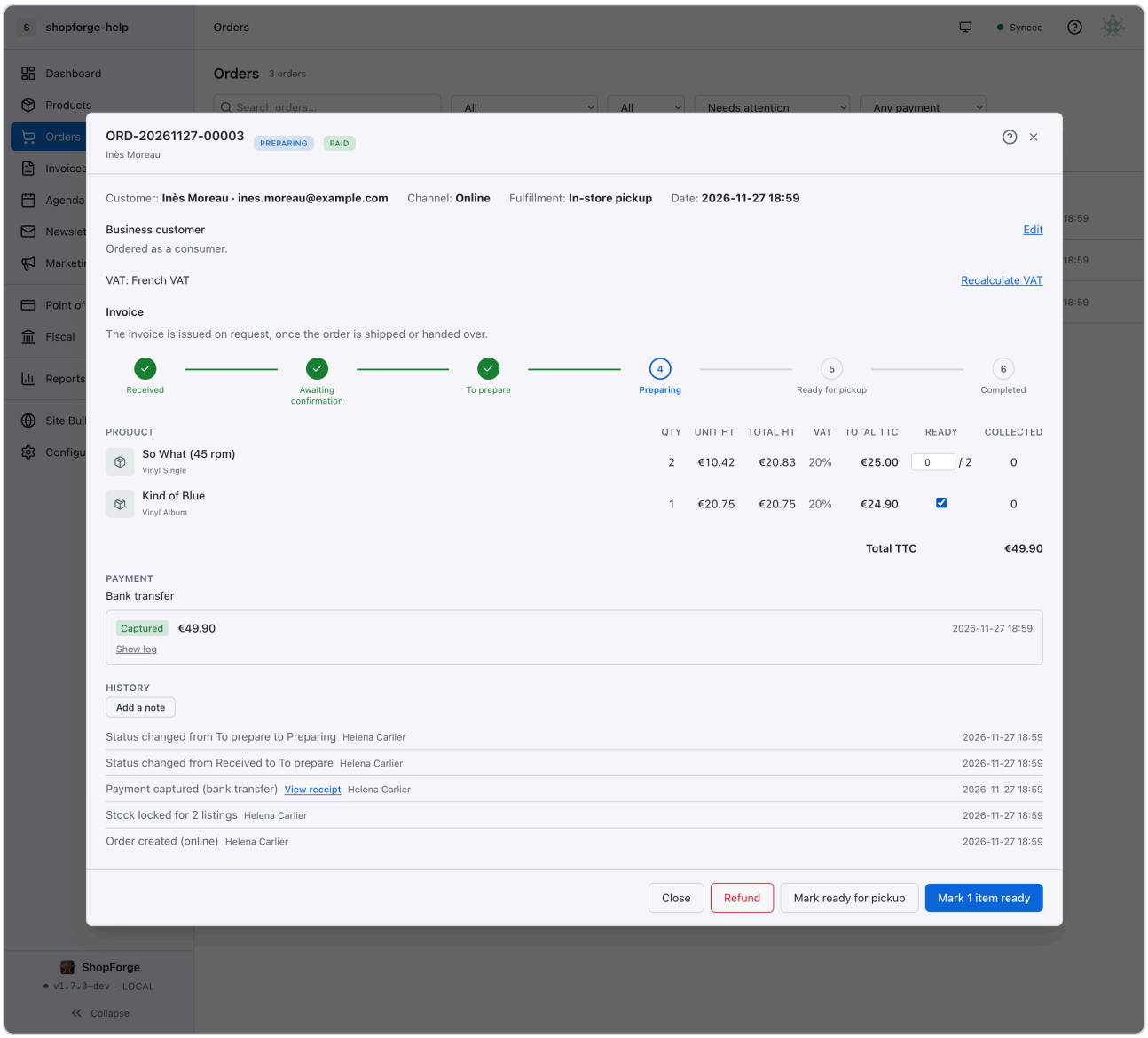
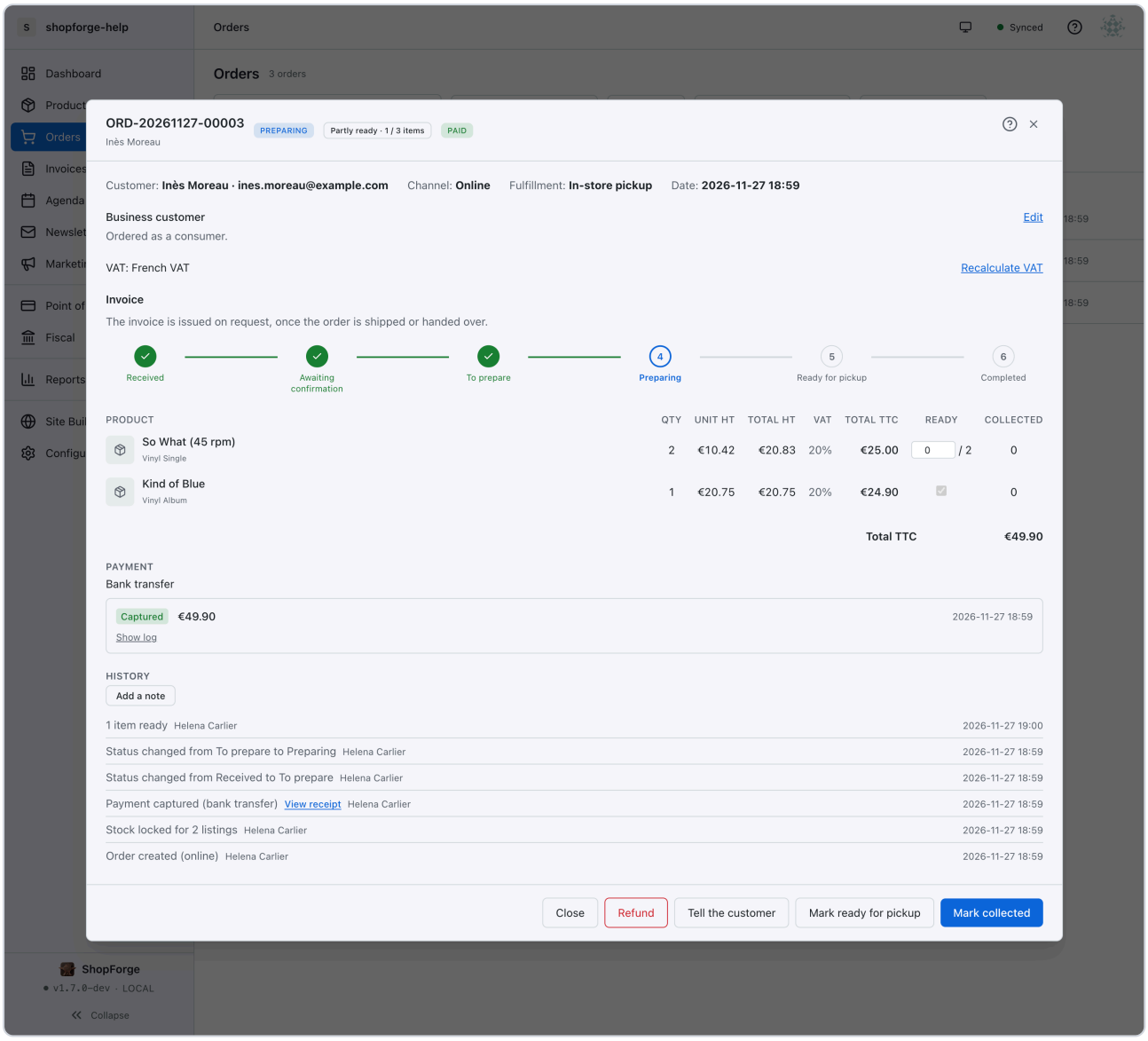
Mark items ready

1. Open the order and, for each line, set the number in **Ready** (you can only raise it), then click **Mark n items ready**. To mark everything at once, click **Mark ready for pickup**: every item still waiting is marked ready in one click, so the order becomes ready and the customer receives the ready-for-pickup e-mail.

The order becomes *Ready for pickup* only when no item is waiting, because a ready order is one you have nothing left to prepare. While some items are ready and others still wait, the order stays *Preparing* and shows the chip **Partly ready · 2 / 3 items**. When the last waiting item is ready, the customer receives the ready-for-pickup e-mail. The order becomes *Completed* once every item is collected. Changes made without a connection show **item state changes waiting to sync** and are sent when the connection returns. If the server refuses a change, a notice says so, and **Dismiss** removes it.





Tell the customer

When some items are ready, click **Tell the customer**. The window **Tell the customer: partial pickup** shows the e-mail that will be sent: the shop's text, then the items ready to collect now, the items already collected and the items still being prepared, each with its count per product; a group with no item is left out. Click **Tell the customer** to send it. This is always your choice: no e-mail goes by itself while an item is still waiting. The send is recorded in the history; a failed send changes nothing and is not retried.

The button waits while item changes are not yet synced, so the e-mail never counts other items than the order does. The text around the lists is edited in **Configure → Emails** ("Partial pickup: items ready"; administrators).

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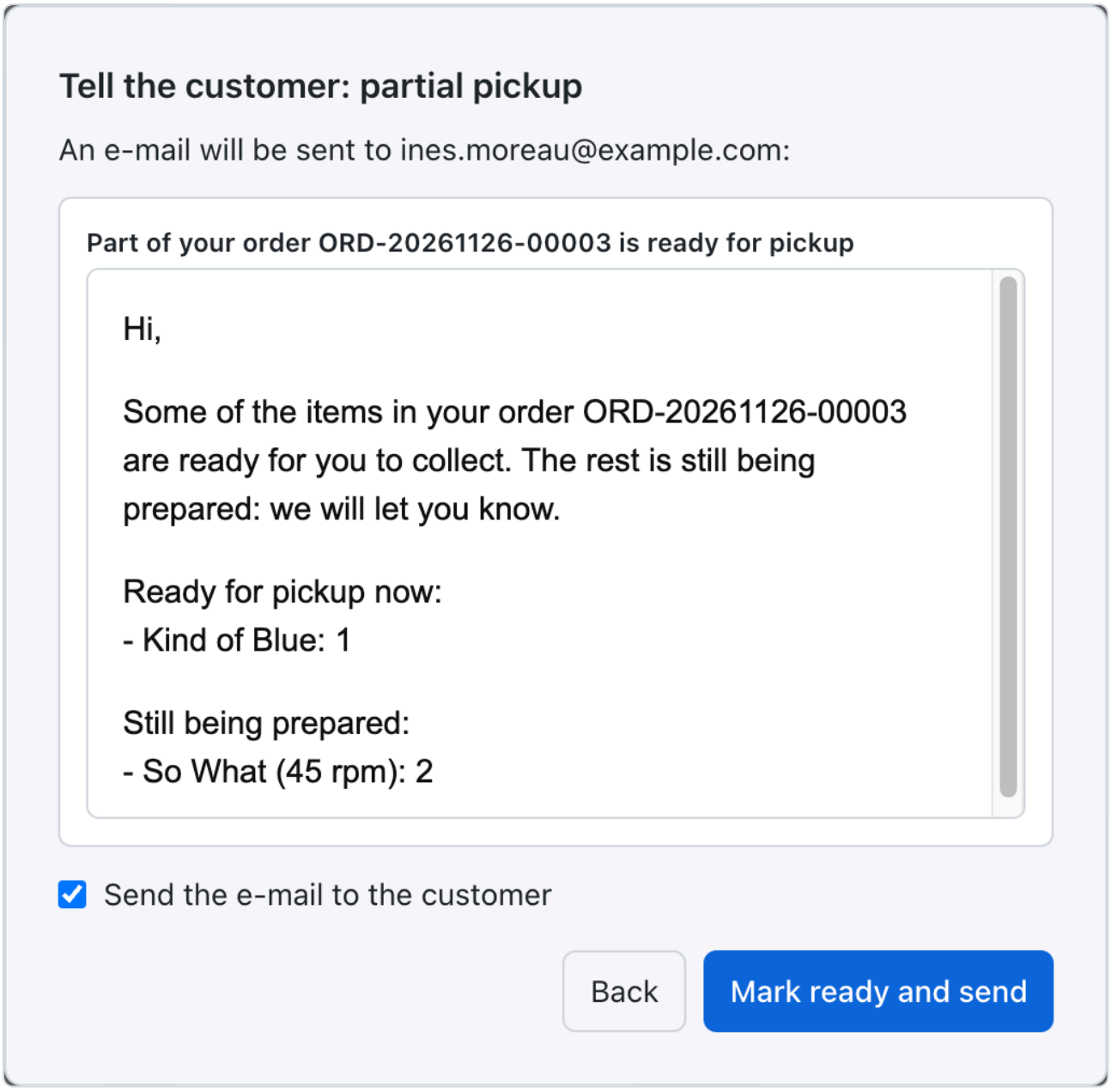

Hand items over (order paid online)

For an order the customer already paid online, click **Mark collected**, choose how many ready items of each line the customer takes, and click **Confirm hand-over of n items**. Nothing is charged and the payment status does not change.

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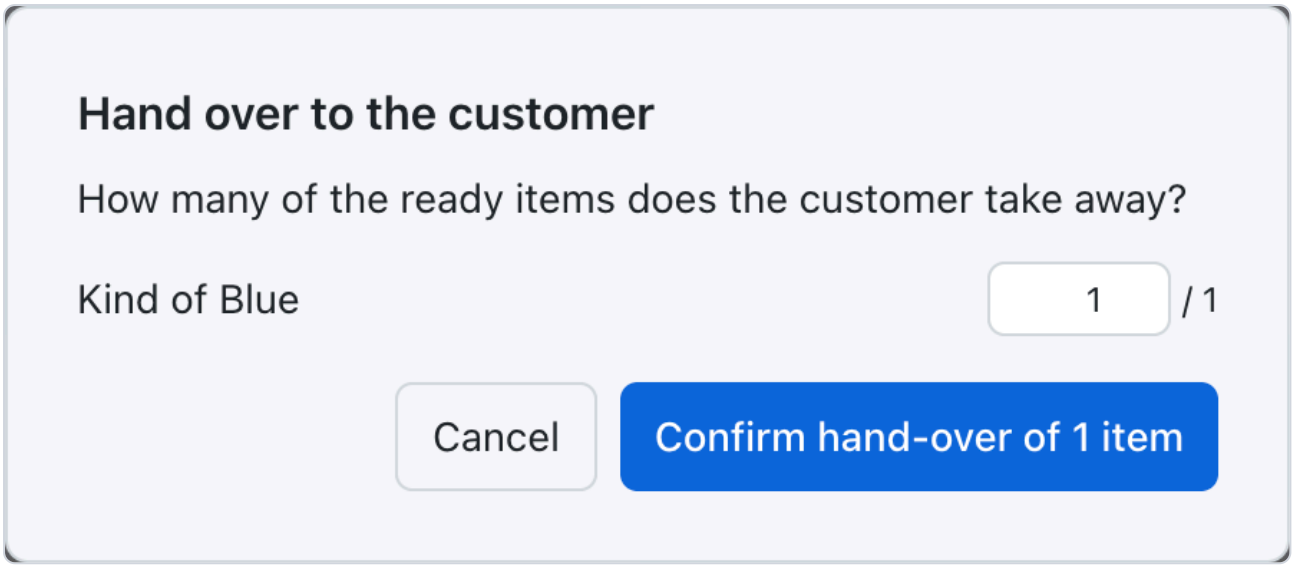

Order paid in store

Pay Order is available once the order is **Ready for pickup**, that is when no item is waiting: an order paid in store is paid when everything is ready, not in parts while items wait. The customer gave a billing address at checkout (their default address, chosen for them), which the order's invoice uses. Its basket holds each line at the number of ready items. When the customer takes only some of them, the sale marks those collected and the order stays **Ready for pickup**, not yet paid in full; **Pay Order** is available again for the rest. The order becomes *Completed* and paid when its last item is collected. While item changes are not synced yet, the button is disabled and says why.

The payment section reads, for example, **2 of 3 items collected, 8.00 € paid**, from the till sales of the order (the sum includes anything else the customer bought in the same sale, such as a bag).

A sale line that could not be matched to an item of the order, or that is above the ready items, raises a notice (the **Notice** chip and a warning entry in the history, see *When a change could not be applied*): the sale itself stands, and the difference is settled at the till (a refund or a correction).

Pre-ordered items

A pre-ordered item is handed over **line by line**, as soon as that line's own units have arrived (see *Pre-orders* in the Products chapter):

- If a shipment is short, hand over the orders it covers — normally the earliest ones; the others wait. Completing an order whose units have not arrived is refused with a "has not arrived yet" message, and it can be completed after the next receipt.
- An **official release (embargo)** is not handed over before its release date, whatever has arrived. A **restock** has no date to wait for.

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- **Refunding** a pre-ordered line that has not been handed over closes it whether or not you tick **Put back in stock**: nothing physical left the shop, so the pre-order capacity comes back. For a line already handed over, the units go back to stock only if you tick the box. A line partly handed over cannot be refunded in one go with "put back in stock": refund its handed-over units and its other units in two separate refunds. On a line partly handed over, leave the box unticked when nothing came back: the refunded units are then the ones still waiting, and their pre-order is closed.

Cancel the rest of the order

If the customer has collected and paid for part of an order in store and will not come back for the rest, click **Cancel the rest** (an employee or an administrator; online only). The window **Cancel the rest of the order?** says how many items not collected will be cancelled, that the items already collected are not touched, and that nothing is refunded. It lists **Put back in stock** with every line ticked: untick a line whose item is not really on the shelf. Click **Cancel the rest** to confirm; **Keep the order** closes the window and changes nothing. The order is then *Completed*, and the history reads "n items cancelled". No e-mail is sent to the customer.

The button is not offered for an order the customer paid online (it is cancelled through its refund), nor before any item is collected (cancel the order instead). While an item of the order is collected, the ordinary cancellation is refused for the same reason: it would put collected items back in stock.

When a change could not be applied

If two people changed the same line at the same time (for example, two workstations offline), the server applies what fits and does not move the rest. The history shows a warning entry, and the chip **Notice** at the top of the order jumps to the latest one.

Collect payment in store

Pickup orders that were not paid online can be paid at the till:

1. Open the order → **Pay Order** (available for *pickup* orders that are **Ready for pickup**, unpaid, with no transfer already in progress).
2. A **POS transfer** is opened and you land on the Point of Sale with the basket pre-filled from the order.
3. Complete the sale at the till as usual — the order is then marked paid and the payment is recorded automatically.

While a transfer is open, the order shows the amber **POS transfer open** badge. Delivery orders cannot be paid in store.

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If the sale did not happen (the basket was closed, or the payment failed), the transfer stays open and **Pay Order** is not offered. Click **Release the till transfer**, next to the badge: **Pay Order** is back. Nothing was charged, so there is no confirmation. The button is not shown while this till still holds the basket (finish or reset the basket there), nor in a training session. Check first that nobody is paying the order at another till: a sale signed there still completes the order.

Picking list

Orders can be prepared in bulk from the Orders list.

1. Tick the checkboxes of the orders to pick. Selection is locked to one status at a time (rows of other statuses are disabled until cleared).
2. Click **Print Pick List** (available for *To prepare* and, to reprint, for *Preparing*).
3. The combined picking list groups all selected orders: **Artist, Brand, Title, Condition, Barcode, Qty** and **Order #**. Print it.
4. For a *To prepare* batch, **Confirm** moves the whole batch to **Preparing** in one go.

The **Confirm Orders** bulk action is available when *Received* orders are selected — it moves them straight to *To prepare*.

Artist, brand and barcode come from the current catalogue — if a product was edited since the order was placed, the printed information may differ slightly.

Shipping labels and carrier override

Delivery orders on an integrated shipping provider (e.g. SendCloud) are managed directly from the order detail. All shipping actions require an internet connection.

From **Preparing** onwards, the shipping section offers:

- **Generate label** — books a parcel with the resolved provider and produces a downloadable shipping label and a tracking number. A shipping label must exist before the order can be marked *ready for shipping*.
- **Change carrier** — lets you pick a different quoted carrier and service option. Only the carrier identity changes; the delivery fee the customer paid stays the same. The picker shows each option's logo, estimated transit time, price and whether it supports pickup-point / relay delivery.

Once the parcel is booked the carrier is locked in. A link to the label and the tracking number appear in the shipping section.

Parcels leaving the EU

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A parcel to a country outside the EU, or to a French overseas department or territory (Réunion, Guadeloupe, New Caledonia...), carries its customs data by itself: the invoice number (or the order number before the invoice), the goods sold to a consumer and, once it is set, the shop's EORI number (Integrations → Shipping). Northern Ireland (a UK address whose postcode starts with BT) is in the EU for goods, so its parcels carry none of it. The invoice of a parcel to Great Britain is an export, whatever Discogs collected.

- **The customs documents** that come back with the label (the customs declaration SendCloud makes for the carrier) are kept by ShopForge with the order, as long as its invoices, and shown in Proof of export. When none comes back, the shipping section says, in red, "No customs document came back with this label. Check the parcel in SendCloud." SendCloud returns none when the parcel's contents, value or invoice data are incomplete. The label is made either way.
- **Over €1,000 of goods**, the shipping section says "Export over €1,000: an export declaration (DAU) is needed." The label is still made. The customs forms on the label don't cover such a parcel, so ask your carrier or customs agent.
- **The goods value** is the price of the lines that go in the parcel, shipping excluded. Gift cards, donations and memberships don't count.
- **Great Britain, €170 of goods or less.** The shop isn't registered for UK VAT, so the web shop doesn't deliver these orders: it shows "Orders of €170 or less can't be delivered to the United Kingdom." in place of the delivery options. An order you enter yourself for such a delivery is refused with the same message. Northern Ireland and Discogs orders are not concerned.
- **The import charges notice at checkout.** When the customer's delivery address is outside the EU, or in a French overseas territory (Réunion, New Caledonia..., also an address typed as France with a postcode starting 971 to 974 or 976), the web shop's checkout shows one line before **Proceed to payment**: "Import charges may apply. Import duties, taxes and the carrier's clearance fees may be charged on delivery. They are not included in this total and are paid by the recipient." It is text only: it adds no amount and changes neither the total, the VAT nor the order, and it never blocks payment. Monaco, Northern Ireland, pickup in shop and an address not yet chosen get no notice.
- **A Discogs order to Great Britain.** Discogs collects the UK VAT on orders of £135 or less, and the parcel then carries Discogs's GB VAT number. ShopForge never converts pounds, so it decides on the goods value: under €145 Discogs collected it, over €170 it did not. In between, the shipping section asks "Did Discogs charge UK VAT on this order?" with **Yes** and **No**, and "Open the order on Discogs: it shows a VAT line if Discogs charged it." Generating the label is blocked ("Answer the UK VAT question first") until you answer. The answer is kept in the order history, and you can change it until a label exists.
- **"Discogs GB VAT number missing (Integrations → Discogs)."** The label of a Discogs order whose UK VAT Discogs collected needs that number: enter it in Sell on Discogs, then generate the label again.

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Return labels

After the order is marked *Delivered*, a **Generate return label** button appears. The resulting return-parcel label and its shipping status are shown in the **Return shipping** subsection.

Delivery slip

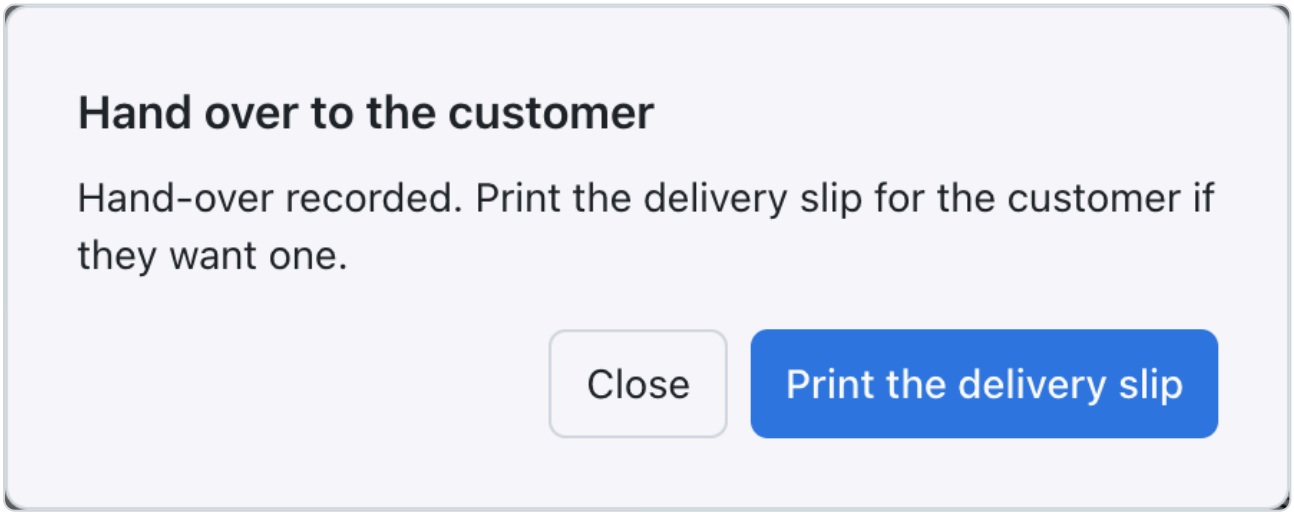
The delivery slip (*bon de livraison*) is the paper that goes in the parcel or into the customer's hands. It lists what is delivered, to whom and where, and the notes you chose to show. It is **not an invoice**: it never shows VAT or the word "invoice", and shows prices only if your administrator turned them on. A slip is made on your computer from the order, so it works offline.

There is one slip per **shipment** (each label generated) and one per **hand-over** (each confirmation of **Mark collected**). A slip carries a number, "n° 1", "n° 2"..., which is the rank of its shipment or hand-over among those of the order. For a partial hand-over each line reads, for example, "1 of 3 (already collected: 2)".

Print a slip

- **A shipment:** once a label exists, click **Delivery slip** in the **Shipping** section of the order.
- **A hand-over:** after **Confirm hand-over of n items**, the dialog stays open and offers **Print the delivery slip**. Close it to skip: you can print it later from the history.
- **Again later:** the order history shows **Delivery slip no. n** on the label entry and on the first entry of each hand-over. Printing again gives the same slip, and the file replaces the earlier one.

The slip is saved as a PDF in the shop's documents folder (`orders/{order number}/bon-de-livraison-{n}.pdf`) and opens in your PDF viewer, from which you print it.





Maison Balades
12 rue du Disque
75011 Paris
SIRET 73282932000074

DELIVERY SLIP

Delivery slip no. 1 · order ORD-20261126-00003
Date: 26/11/2026 02:13

Customer: Inès Moreau
Collected in store

Item	Quantity
Kind of Blue	1 of 1

Message
Please do not bend the sleeve.

The slip is written in your shop's language (here English); a note flagged for the slip prints under **Message**.

Put a note on the slip

When you add a note (see *Notes on an order*), tick **Shown on the delivery slip**. It is printed on the slips made **after** the note was written; slips already made never change. A note can also be sent to the customer; the two boxes are independent. A withdrawal note cannot be printed.

Slip settings

Administrators set, in **Configure → System → Delivery slip**, whether prices are shown (off by default) and the closing line, in French and in English.

Limits

- A delivery to a pick-up point prints the address but not the point's name.
- A hand-over confirmed offline has its slip from the confirmation dialog, but no reprint button in the history until the order has synced.

Refunding an order

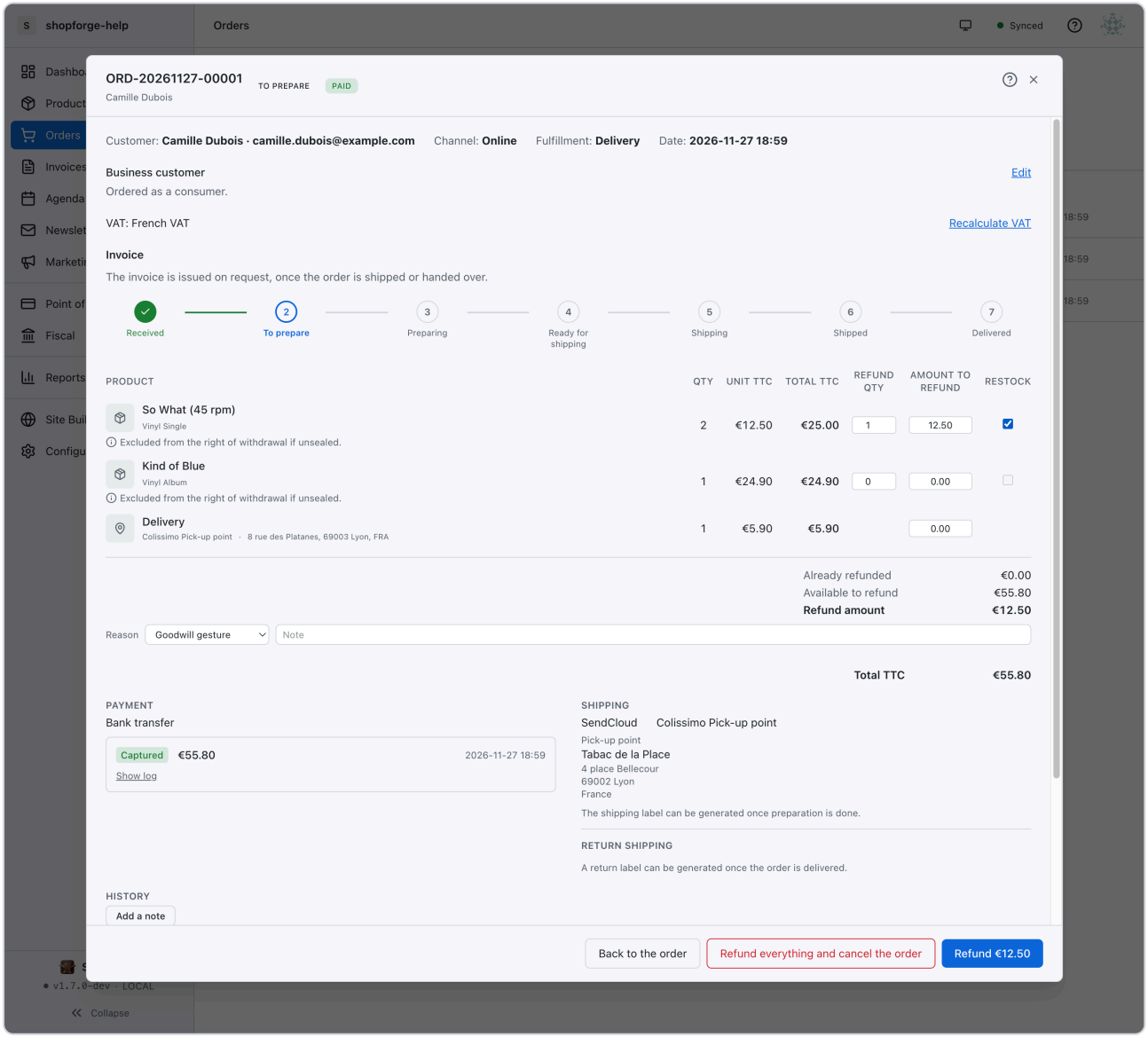
Refunds are available for **online-channel** orders whose payment has been **captured** or is **partially refunded**, and only for **administrators**. Orders paid in-store are refunded through the POS (in-store) refund flow instead. A web order whose customer brings items back to the shop can also be refunded at a till, from its online receipt (see Refund an online order's receipt): the order counts that refund with its own.

The order opens as a read-only document, with no refund field. Click **Refund** in the footer to enter **refund mode**: the lines table shows the refund columns (quantity, amount, restock) instead

of the unit columns, the footer changes, and under the table **Already refunded**, **Available to refund** and **Refund amount** show where you stand. **Back to the order** leaves the mode, drops what you typed and returns to the order as it was. Two paths:

- **Refund selected lines** — set a quantity on each line to refund, then click **Refund selected lines** (once an amount is set the button reads **Refund** and the amount). A line goes back to stock only if you tick **Restock** on it: the box is empty by default, because a returned item is not always fit to be sold again. A confirmation prompt is shown before anything is sent.
- **Refund everything and cancel the order** — refunds everything still refundable on the order and cancels it. The confirmation lists **Put back in stock** with every line ticked: untick a line whose item is not really back on the shelf. Requires an explicit confirmation. Once part of the order has been refunded, the button reads **Refund the rest and cancel the order**.

Once anything has been refunded, a **Refunded** column shows how many units of each line (and whether the delivery fee) have been refunded so far — it stays visible after the order is fully refunded.



Refund as — when the shop's online refund mode offers both methods (Configure → System → Refund modes), pick **Store credit** or **Payment processor** before refunding; the shop's default is preselected each time you open an order. With **Payment processor** only, there is no choice. The refund buttons stay disabled until the refund mode is loaded; if it can't be, the order says "Refunds are unavailable: the refund mode could not be loaded. Reopen the order to retry."

With **Payment processor**, the part of the order paid with store credit comes back as store credit and the rest goes back through PayPal/card. With **Store credit**, the whole refund is given as store credit. There is no manual "refund this exact amount" input for exactly that reason.

A customer who cancels their own paid order from the storefront chooses the refund method themselves when the mode offers both; otherwise they are refunded by their original means of payment.

Gift card in the payment. When the order was paid, wholly or in part, with a gift card, the confirmation lists each card used with a choice: **Back onto the gift card** (preselected; the card keeps its expiry date) or **As store credit**. The customer decides, you record their choice, and the amount that card paid goes where you chose. The choice is locked once the refund is sent. The other parts of the payment (card, PayPal, store credit…) are refunded as above.

If the card has expired or been cancelled by the time of the refund, there is no choice: the confirmation says "The gift card has expired: refunded as store credit." or "The gift card was cancelled: refunded as store credit.", and the amount goes to the customer as store credit, with that reason recorded. A card that was reissued is not followed to its replacement: its amount goes as store credit too. The same choice is offered at the till (see Gift cards at the till in the till help).

Reason and note

Before refunding, choose a **Reason**, in the order of the list: *Goodwill gesture*, *Defective*, *Wrong item*, *Not received*, *Damaged in transit*, *Item out of stock*, *Price error*, *Duplicate charge*, *Other* or *Withdrawal (14 days)*. A **Note** is optional, and required for *Other*. The refund buttons stay disabled, with the reason shown, until a reason is chosen. When the refund also cancels the order, the customer's cancellation e-mail gives the reason only for *Item out of stock* ("Cancelled: an item is no longer available.") or the note you typed, as typed; no other reason is printed.

The refund record

Each online refund is signed in the shop's online register, **ONLINE**, in the same step that records the refund: a signed refund receipt that names the order's sale and returns what was paid, line by line, the way it was paid (store credit, each gift card, then the rest by the payment method). Nothing is asked of you.

Three refusals can appear in the confirmation window:

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- **Fiscal recording is temporarily unavailable. Try again in a minute.** The register could not sign, so the refund was not sent and no money moved. Ask again in a minute.
- **A refund of this order is being completed. Try again in a few minutes.** An earlier refund of this order has not finished: it is completed by itself, and no other refund of the order is accepted until it has. Do not ask again at once.
- **This refund was started with other amounts and is waiting to be completed. Check the order before trying again.** A refund of this order was stopped part-way and cannot be completed with these amounts: it waits for a person. Open the order, look at what was refunded, and do not repeat the refund until you know where it stands.

If an earlier refund still cannot be completed after repeated attempts, **Online refund not completed** appears in Fiscal → Closures → Exceptions and the order keeps refusing other refunds. The money may already have been paid back: tell whoever supports the shop before refunding again.

A disputed payment

When a customer contests a PayPal payment, the order reads **Disputed** and its history says so: the line gives PayPal's reason (for example *Item not received*), the dispute's number, which opens the dispute in your PayPal account, and under it what the buyer wrote when opening it (*Buyer: "..."*). The rest of the conversation with the buyer is in PayPal. While the dispute is open, **Refund** stays greyed out, with *Refunds are paused while the payment is disputed.* on hover, and neither you nor the customer can cancel the paid order: a refund now could pay the money back twice. Answer the dispute in PayPal. When PayPal resolves it, the history shows *Payment dispute resolved* and the order reads what its payments and refunds give (Paid, or Refunded if PayPal gave the money back); Refund works again. If the resolution gave the money back to the customer, or closed a dispute whose money had already been taken back without the buyer winning, the order shows a refund to confirm (see A refund made outside ShopForge).

If PayPal's end of the dispute never reaches ShopForge, an administrator can close it by hand: see **Close the dispute** below.

A refund made outside ShopForge

A refund can be made where ShopForge does not do it: in PayPal's own dashboard, or by Discogs. ShopForge does not turn what it hears into a refund by itself: nothing is signed, no credit note is issued and no stock moves until you confirm it. The order then shows a block **Refund made outside ShopForge, to confirm**, one entry per refund, saying where it was reported:

- *PayPal reported a refund on {date}. Check the amount on your PayPal account.* The payment reads **Refunded**, as PayPal says, but the refund itself waits for you.

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- *Discogs shows « {status} » for this order. Discogs doesn't give the amount.* This is Discogs's « Refund Sent », or a paid order that Discogs cancelled (Cancelled, Merged, Item unavailable), or a status of « In Progress » or « Shipped » that was set by hand on an order cancelled here.
- *Dispute closed: were the funds returned?* When PayPal closes a dispute after the money was already taken back, and the buyer did not win: the funds may have come back to you.

What you can do depends on the entry. Only an administrator can act on it.

- **Confirm the refund** (a paid order's refund): opens the refund with its lines. Enter the **Amount refunded by PayPal** (or Discogs), the amount on your account at the provider; *The amount on your {provider} account. The selected lines must add up to it.* If they do not, the refund is refused: *The selected lines come to {lines}, not {amount}.* Confirming signs the refund and records it on the order, but asks nothing of the provider and grants no store credit: the money already moved. Confirming a Discogs cancellation of a paid order also cancels the order.
- **Already recorded**: the refund was already made in ShopForge. Choose, in *Which refund does it duplicate?*, the refund it repeats. Nothing new is signed.
- **Funds returned**: after a dispute, when the money did come back to you.
- **Confirm the amount**: for a refund of a payment that paid no order, and for money that came back (an **Amount returned by PayPal** after a closed dispute, or a Discogs status on a cancelled order, which means the buyer paid). It signs the amount alone, with no lines.
- **Nothing received**: for money that did not come back: the entry closes with no record.

Each closing names the administrator who made it. While the order's dispute is open, nothing can be confirmed: *Dispute in progress: the funds may come back. You can confirm once the dispute is closed.* An administrator can still **Close the dispute**; the screen first warns *Only if your PayPal statement shows the dispute closed. This is journalled under your name.* and the closing is journalled as **Dispute closed by hand**.

The same entry is listed in Fiscal → Closures → Exceptions as **Online refund to confirm**, where it cannot be acknowledged: it says *Confirm this refund on its order.*

Cancelling while PayPal settles

When a payment is still being confirmed by PayPal, the order shows **Cancel order (refund once PayPal settles)**. The cancellation is recorded at once and completes when PayPal settles the payment: if money was taken it is refunded in full (PayPal may keep its fixed fee). The confirmation lets you choose which lines go back to stock, as above.

Withdrawal declared by the customer

A customer can declare a withdrawal from their account, line by line, as often as they like within the period. The order then shows, at the top of its detail, a band **Withdrawal declared on {date}**

with the lines declared, **Refund due by {date}**, and the refund method the customer chose (**Refunded by: … (customer's choice)**). The customer receives an acknowledgement e-mail; if it could not be sent the band says **Acknowledgement not sent** and offers **Write to the customer**, which opens a note to the customer.

In the order list, the filter **Withdrawal declared** shows only the orders with a declaration (**Any withdrawal state** removes it).

To refund a declaration, choose the reason **Withdrawal (14 days)**: the refund method is then the customer's choice and cannot be changed (if the shop no longer offers that method, you pick one again). When the refund takes back every line of the order, the standard delivery cost must be refunded with it: the panel shows the minimum (the lesser of the delivery fee paid and the standard fee, less anything already refunded) when the amount is below it. A refund of only some lines needs no delivery refund. The panel also says **Day n since delivery**. After the withdrawal period it reads **Outside the withdrawal period** and the refund is at the shop's discretion; it never blocks the refund.

A line of a category that is excluded from the right of withdrawal once opened shows **Excluded from the right of withdrawal if unsealed.** This is information only: check the item before refunding, and the refund remains possible.

What your customer sees

In their account, every order shows the button **Withdraw from the contract here**, from the day the order is placed until the end of the withdrawal period. The period is 14 calendar days from the day the customer takes the goods (an order delivered: the day it is marked delivered, for several parcels the day of the last one; a pick-up order: the day it is completed); if its last day is a weekend or a public holiday, it ends on the next working day. Once the goods are taken, the button also shows **n days left**. The calendar knows the public holidays of metropolitan France only.

- **The order has not shipped yet:** the button leads to the cancellation of the order. It is cancelled at once, as the customer's withdrawal, and refunded in full if it was paid. The customer receives the withdrawal acknowledgement e-mail (the one you edit under **Configure → Emails**, below) and no cancellation e-mail.

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- **Otherwise** the customer sees the order reference and its lines, all selected, each with a number of units (the right is declared unit by unit). A line already partly declared shows **1 / 3 already declared** and cannot go beyond what is left; a fully declared line reads **Already declared** and cannot be selected. A line of a category excluded from the right of withdrawal once opened brings the notice *Unsealed audio and video recordings (vinyl records, CDs, DVDs, Blu-ray discs, cassettes) are excluded from the right of withdrawal.* It informs and never blocks: you judge the goods when they come back. When the shop offers both refund methods, the customer chooses **Refunded by**; the choice is their consent. They click **Confirm the withdrawal** and read *Your withdrawal was recorded on {date} at {time}. A confirmation email will be sent to you.*

Once every unit has been declared, the button is replaced by *Withdrawal declared on {date}*.

The customer receives the acknowledgement e-mail at once. You edit its text in **Configure → Emails** ("Withdrawal acknowledgement"; administrators). The default text ends with the order reference, the declared items, the refund method and the date and time it was sent; they are the fields `{{withdrawalLines}}`, `{{refundMethod}}` and `{{declaredAt}}`, which you can move; keep them in the e-mail, since the acknowledgement must tell the customer what was declared. The default text tells the customer that they have 14 days from the declaration to send the goods back, and that you refund within 14 days of the declaration and may wait until the goods, or proof that they were sent, arrive. Whether it went out is recorded in the history (and in the band, see above).

A withdrawal by phone or e-mail

Only the customer's own declaration in their account is recorded as a declaration. When a customer withdraws by phone or e-mail:

1. Add a note to the order (**Add a note**) saying who withdrew, when and from what, and ask the customer to send the goods back. Nothing else is recorded: the order shows no band and the list filter does not find it.
2. When the goods arrive, click **Refund**, set the quantity of each returned line, tick **Restock** only for the items fit to be sold again, choose the reason **Withdrawal (14 days)**, and confirm with **Refund** and the amount. Without a declaration the refund method is yours to choose among the methods the shop offers.
3. Check unsealed recordings when they come back: a line marked **Excluded from the right of withdrawal if unsealed** is refunded at your discretion.
4. On a full withdrawal, refund the delivery cost with it (the panel shows the minimum, see above).

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VAT of an online order

An order placed online (the shop, a staff order, Discogs) is taxed according to where it is delivered, as set in Fiscal settings. The order detail shows the result on the line **VAT:**. A till order has none of this.

The line says	Meaning
French VAT	Delivered in France (Monaco included), or in another EU country while the shop's EU sales are under €10,000: the French rates apply.
Destination VAT (Germany), OSS	Delivered in another EU country, the shop having passed €10,000 and being registered for the OSS: the rates of that country apply, and the country is named.
Intra-community supply, exempt	Delivered to a business in another EU country whose VAT number was confirmed by VIES: no VAT.
Export, exempt	Delivered outside the EU, or in a French overseas department or territory (Réunion, Guadeloupe, Martinique, French Guiana, Mayotte…), whatever the channel and the amount, Discogs included (even when Discogs collects a tax abroad): no VAT. An address typed as France whose postcode starts with 971 to 974 or 976 counts as its overseas department. Monaco counts as France. Northern Ireland (a UK address whose postcode starts with BT) counts as an EU country, not as an export.

The price the customer pays never changes. Only the split of that price into excl. VAT and VAT does, and so the invoice, which carries the matching mention.

A **donation** is outside the scope of VAT in every treatment: its line has no rate, is never an export or taxed in the destination country, and **Recalculate VAT** leaves it alone.

Flags

- **OSS not registered: taxed at the French rate.** The shop passed €10,000 of EU distance sales without being registered for the OSS, so this order was taxed at the French rate. See the warning in Fiscal settings.
- **Rate not checked for {country}.** The order was taxed at the rates of its destination country (the OSS), and the shop had not ticked that country as checked in Fiscal settings. It is a reminder: it never blocks the order or the invoice, and the invoice does not mention it. In the list it is the **Rate not checked** pill.

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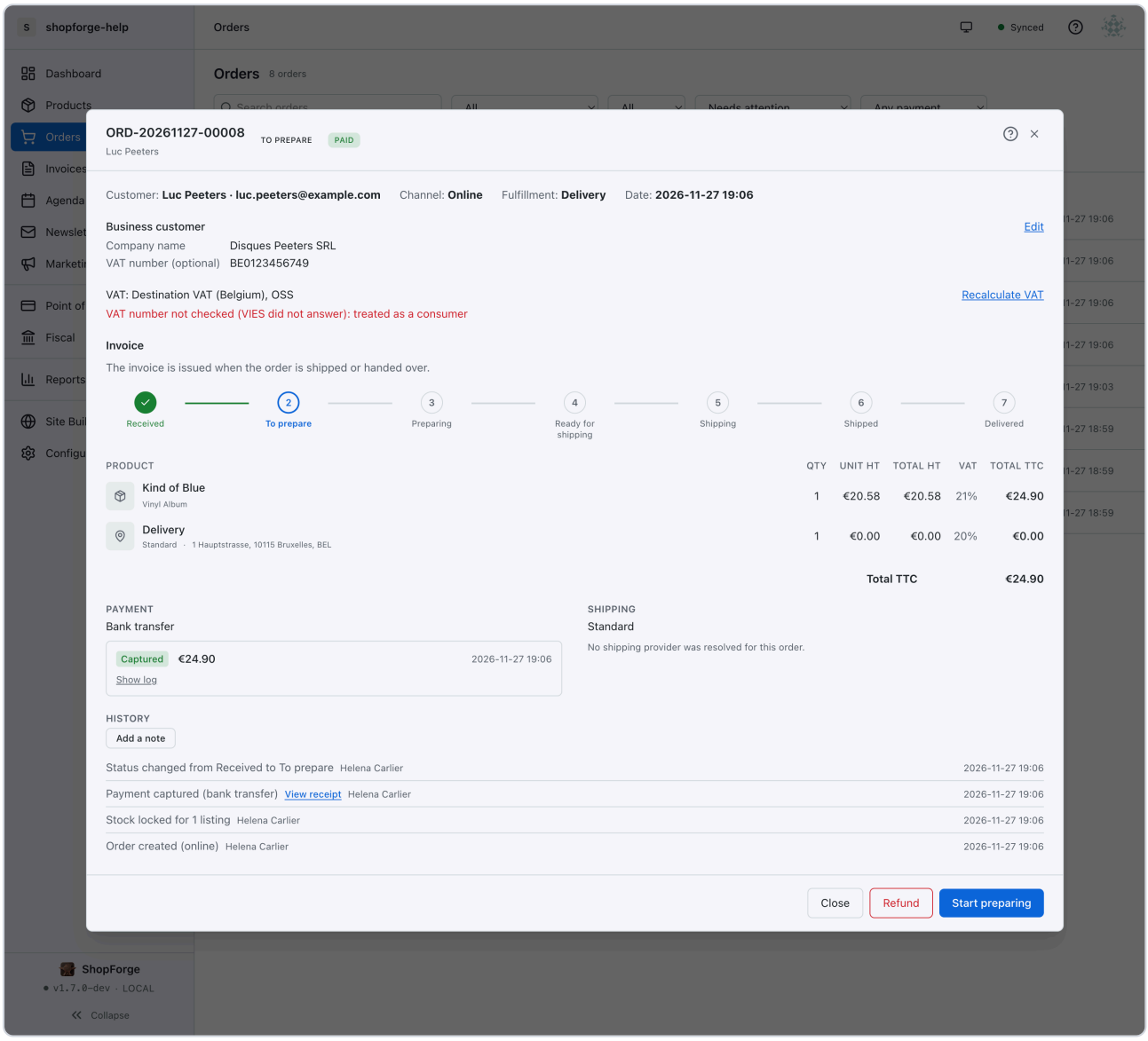
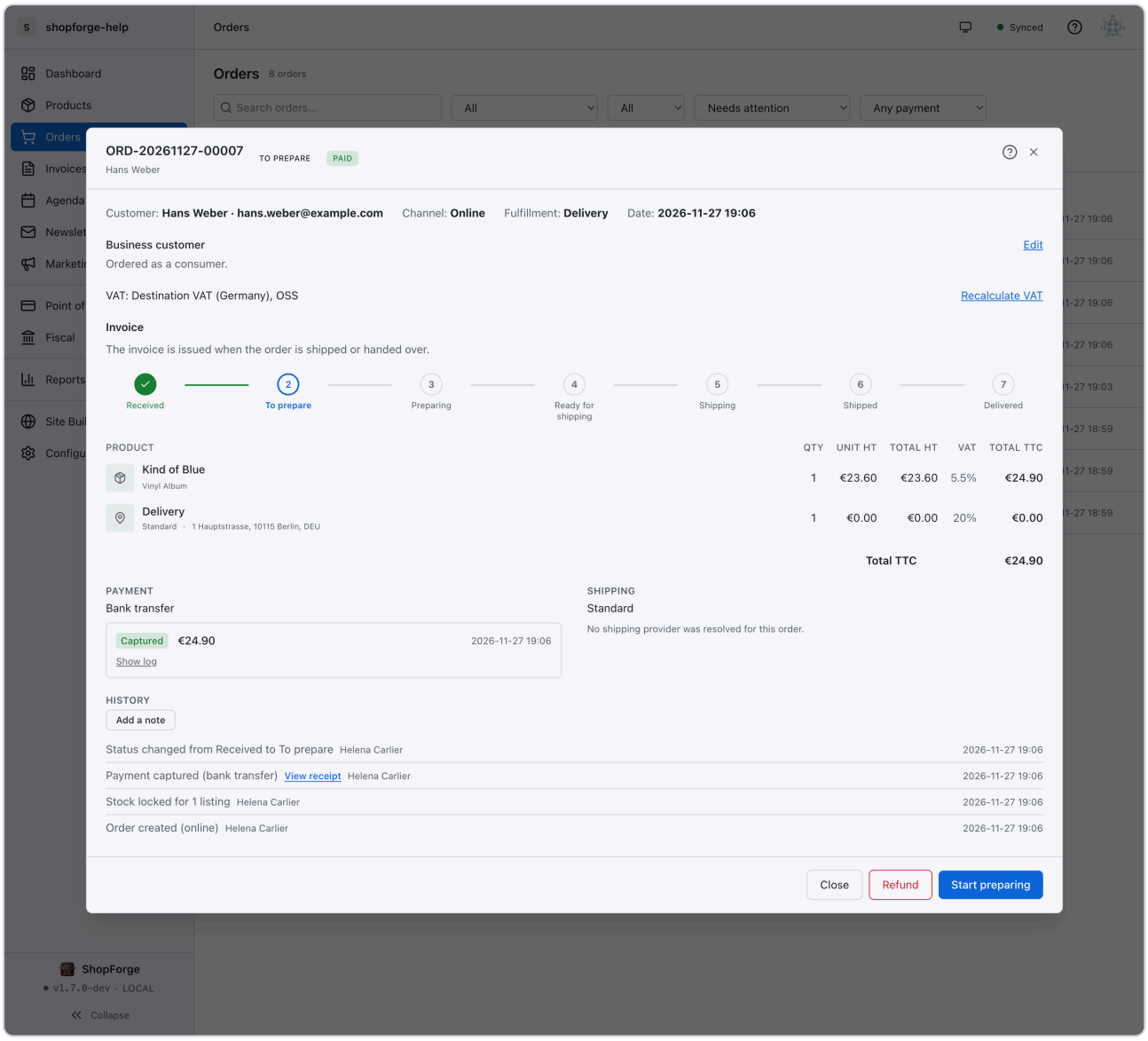
- **VAT number not checked (VIES did not answer): treated as a consumer.** The customer gave an EU VAT number and the European check service did not answer, so the order was accepted as a consumer's. Use **Recalculate VAT** when the service answers.



Recalculate VAT

The treatment is decided when the order is created, with the address and VAT number known then. **Recalculate VAT** decides it again with the order's **current** address and VAT number, and checks the VAT number again with VIES.



- **When it is offered.** To an **administrator**, on an online order **that has no invoice yet**, and only **online**: the check needs a connection. Once the invoice is issued, the VAT can no longer be recalculated: the invoice keeps what the order held.
- **What it changes.** The VAT rate, the excl. VAT amount and the VAT of each line and of the delivery fee, the VAT breakdown, the **VAT:** line and the flags.
- **What it keeps.** The total including VAT, the payment and the items.
- **In the online register.** When the order's payment was recorded in **ONLINE**, the recalculation also cancels the signed receipt of the sale and signs a new one with the new split, in one step. If the split does not change, nothing is signed.
- **How.** Choose **Recalculate VAT**, then confirm. The message *VAT recalculated.* appears, and the **History** gains a line *VAT recalculated: French VAT → Destination VAT (Germany), OSS* with who did it and when.

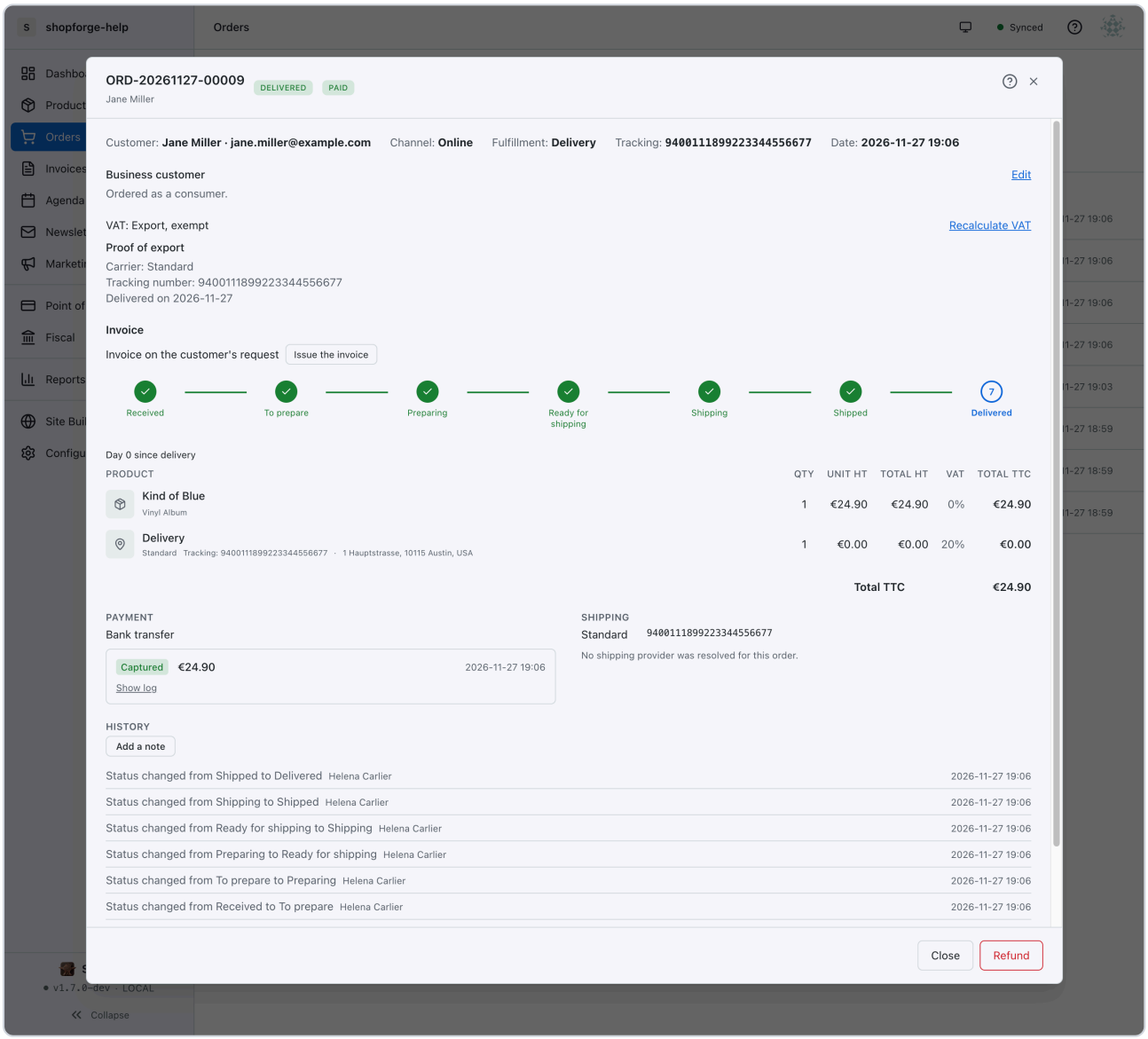
A Discogs order recalculates by itself when you confirm its address (see Review a Discogs address), as long as it has no invoice.

Proof of export

For an **Export, exempt** order, the block **Proof of export** gathers what proves the export:

- the shipment's **Carrier** and **Tracking number**;
- **Deposited on {date}**: the day the carrier took the parcel, its first movement after the label;
- **Delivered on {date}**, once the parcel is delivered;
- **Customs documents**: one link per document kept from the label (**Customs document 1**, **Customs document 2**…), each opening ShopForge's copy. When the label came back with none, the block says **No customs document kept** (see Parcels leaving the EU).

The deposit date and the documents are read from the server, so they need a connection. Offline, the block shows what this computer has: the carrier, the tracking number and the delivery date.

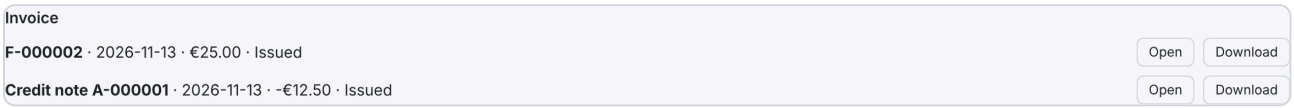


Invoices and credit notes

An order's invoice and its credit notes are shown **on the order**, and every invoice and credit note of the shop is listed in one place. ShopForge issues them at the moments described in Invoices: by itself, or, for an invoice on request, when the customer or staff ask for it (see Automatic, or on request).

On the order

The **Invoice** panel sits under the billing details of the order.



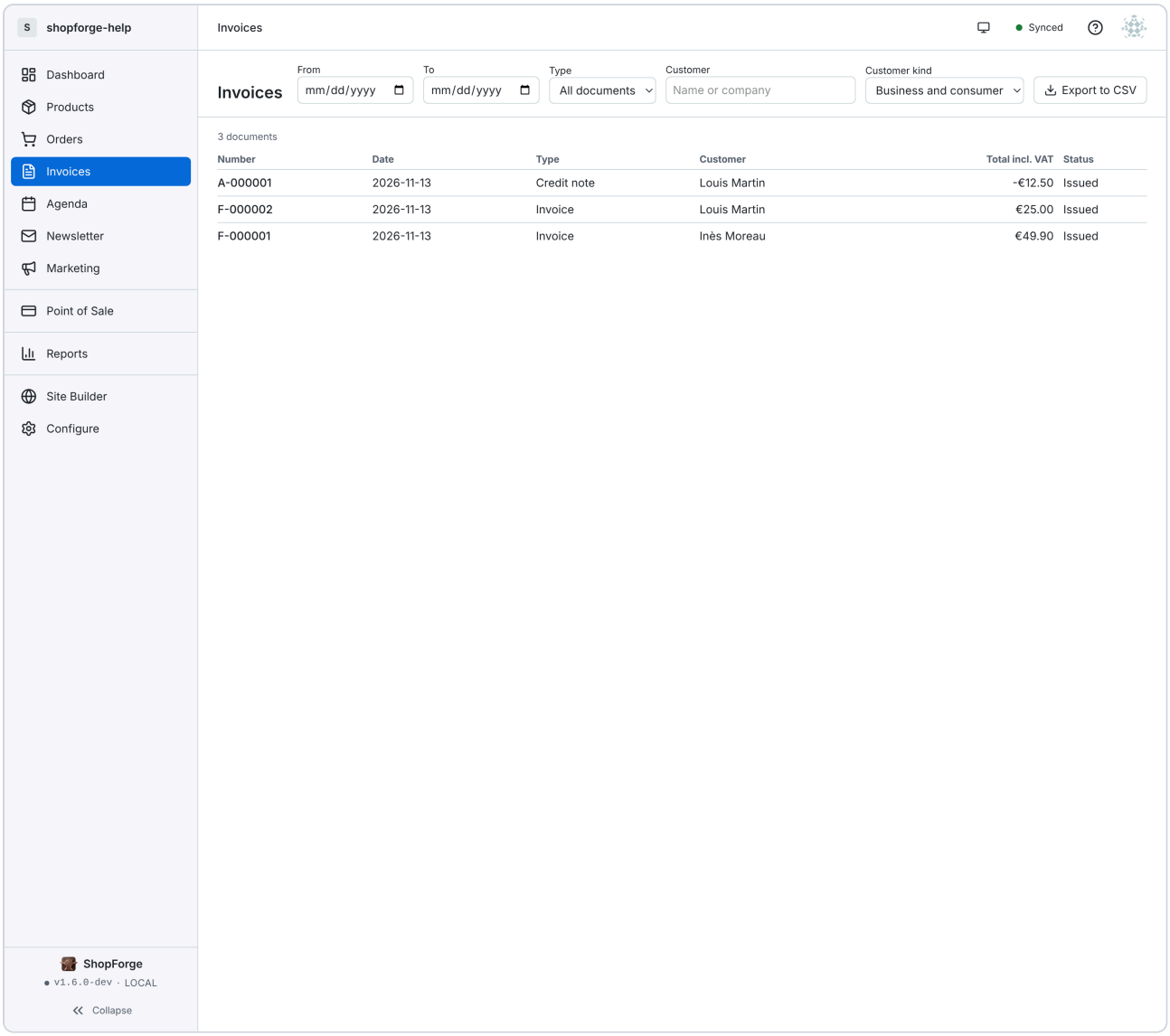
- **Once the invoice is issued**, the panel shows its **number**, its **date**, its **total including VAT** and its state: **Issued**, or **Invoice PDF pending** while the file is still being drawn. **Open** and **Download** work as soon as the file is stored and stay greyed out until then. If the file cannot be opened, a message gives the reason.
- **Before the invoice is due**, the panel says *The invoice is issued when the order is shipped or handed over.* A pickup order is invoiced when it is ready or collected: see Invoices.
- **When it is due and not issued yet**, the panel says *There is no invoice for this order*.
- **When the invoice is on request** and nobody has asked for it yet, the panel says, once it is due, *Invoice on the customer's request*, with **Issue the invoice**. Before it is due: *The invoice is issued on request, once the order is shipped or handed over.* **Issue the invoice** issues it: *Invoice {number} created.*, and the panel then shows it. Offline, the register keeps the request and sends it when it is back online: *The invoice will be created when the register is back online.* If it fails: *The invoice could not be issued. Please try again later.*
- **When the order has no address at all** (no billing and no shipping address, and no invoice yet), the panel says *Billing address needed for the invoice.* with **Set billing address**: an invoice is only numbered once it has a buyer address. Choose one of the customer's saved addresses (their default is selected), or **Add an address**, which saves a new one to the customer's addresses first (label, recipient, address line, postal code, city and country), then **Save**. The invoice is then issued at its usual moment, or within a quarter of an hour if that moment has passed. This also works offline; the change is sent at the next sync. An order created by staff without a billing address already takes the customer's default address, so this mostly concerns a customer with no saved address.
- **Credit notes** come under the invoice, one line per refund, each with its number, date, total and state. See Refunding an order.

An invoice and its credit notes leave a donation out: an order of donations only has no invoice, and the refund of a donation has no credit note.

The panel reads the register's own copy of the data, so it works offline.

The Invoices list

Invoices in the menu, next to **Orders**, lists every invoice and credit note, the newest first: number, date, type, customer (the company name when there is one), total including VAT and **Status**, with the count of documents shown.



Narrow the list with the filters; they add up:

- **From** and **To**: the period, both days included.
- **Type**: invoices, credit notes, or all documents.
- **Customer**: part of the name or of the company name.
- **Customer kind**: business or consumer. A customer with a SIREN or SIRET is a business, and so is a company billed outside France, which has a VAT number instead.

Click a row to open its order. A document made at the till has no order (the row says *Till sale*), so its row opens nothing.

Export to CSV

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Export to CSV saves the documents **currently shown**, filters included, as a file a spreadsheet opens with its accents right. One row per document: number, date, type, customer, company, SIREN/SIRET, VAT number, total excluding VAT, total including VAT, status and, for a credit note, the invoice it refers to. Amounts are in the shop's currency, with a comma; a credit note's amounts are negative.

Online payments

For orders paid online, the payment section lets you (online only):

- **Show log** / **Hide log** — see the raw provider operations behind a payment.
- **Reconcile** — push a payment still in a pending state.

The signed receipt of an online order

When an online order becomes paid, its sale is signed at that moment in the shop's online register, **ONLINE**, in the same step that marks the order paid: for a card or PayPal payment, a bank transfer, an order paid with store credit or gift cards, and a Discogs order whose payment is received. The signed receipt carries the order's lines and delivery fee, its VAT, its channel (the shop's site or Discogs) and how it was paid: store credit, each gift card, then the rest by the payment method. There is one receipt per order paid, however many payments or gift cards settle it: a payment notification that arrives twice does not make a second one. Nothing is asked of you. The receipts are listed in Receipts, with the till's.

A payment that pays no order is still recorded. It happens when the payment arrives for an order that was cancelled, for a second payment on an order already paid, for a payment that comes after the provider had given up on it (failed or expired) or after it was refunded, or when the amount paid is not the amount due. It is signed in ONLINE as a payment that belongs to no order, outside the scope of VAT, so the money is never missing from the books. On a card or PayPal payment, the payment shows **Needs attention** in the order's payment section; when the amount is wrong, the order is **not** marked paid: look at the payment, then settle it with the customer. A Discogs order has no payment section: a Discogs payment on a cancelled order shows the Discogs conflict **Paid on Discogs, but cancelled in ShopForge.** instead.

If the signing is briefly unavailable, nothing is written. A card or PayPal payment is recorded once it is back, with no action from you, and a Discogs payment is picked up again at the next poll. An order paid with store credit or gift cards is different: if its payment cannot be recorded, the order is cancelled, and you will see a cancelled order, not a payment confirmed later.

A payment "Awaiting PayPal"

PayPal sometimes takes a payment without settling it right away — a security review, an eCheck, or a receiving preference on the shop's PayPal account. The payment then shows **Awaiting**

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PayPal, with PayPal's reason, and the order stays open and unpaid with its stock reserved until PayPal reports the outcome: it is never given up on after a delay. Once the payment settles the order is paid and confirmed as usual; if PayPal refuses it, the order is cancelled and the stock released.

- A hold that only the shop can clear — a payment to accept, or an account to confirm or verify in PayPal — is marked **Needs attention** at once and says so; the same badge appears on any hold still open after 30 days.
- The buyer is emailed that the order was received and the payment is still being confirmed once the hold has lasted the delay set on the PayPal card (see Integrations).
- **Cancel order (refund once PayPal settles)** cancels an order whose payment is still awaiting PayPal. Nothing can be refunded yet, so the cancellation is recorded now and completes when PayPal settles the payment: if money was taken, it is refunded in full by the method you pick, and PayPal may keep its fixed fee. Until then the order shows the cancellation as pending and cannot move forward. A buyer can request the same from their account.

The address PayPal used

Once a PayPal payment is captured, the payment shows **Address PayPal used**: the delivery and billing address PayPal holds for the transaction, as PayPal reports it. It is the address a dispute is answered with, so keep it in mind when a customer says a parcel never arrived.

It normally matches the order. When it does not, the payment is marked **Address differs at PayPal**, and each difference is listed with what the shop sent and what PayPal has. The order's own address is not changed: it is still the one used for delivery and the invoice.

- A different **delivery** address is the one that matters — most likely on a card payment, where PayPal may use the address saved in the buyer's own account. PayPal Seller Protection only covers delivery to the address PayPal holds, so check with the customer before shipping such an order.
- A different **billing** address alone is the PayPal account holder's own address. It is shown for the record and needs nothing before shipping — nor on a pickup order, which has nothing to ship.

A field PayPal does not report is simply left out, and never counted as a difference — PayPal often reports only the country for the billing address.

Discogs orders

When your shop sells on Discogs, the Discogs orders come into the same list as the shop's own, with the **Discogs** channel. They are prepared, labelled and shipped like any other order, from the same order window. The connection and the channel settings are in Discogs sales (administrators); the products you put on Discogs are in Products.

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A Discogs buyer has no customer account, and **ShopForge never sends an e-mail to a Discogs buyer**: you talk to the buyer through Discogs messages (see Discogs messages). The order window says it: "No customer account. ShopForge never emails a Discogs buyer: reply through Discogs messages below." A note on the order can only be for the team: the option to send it to the customer is not offered.

Flags in the list

The **Needs attention** filter lists the orders that need you (offline too, as it reads the synced orders):

- **VAT or invoice to check** — for every shop: the orders whose VAT treatment needs a look (**OSS not registered**, **VAT number not checked** or **Rate not checked**, see VAT of an online order), and the paid orders that still have no invoice 7 days after they last changed, although their invoice was due. **See the orders**, on the **Orders and invoices** card of Fiscal → Overview, opens the list on this choice (see Overview).

The **Channel** filter has a **Discogs** choice, and once a seller account is connected **Needs attention** also offers the Discogs orders that need you:

- **To resolve** — orders with an **Oversold**, **Unlinked item** or **Status conflict** flag;
- **Address to check** — orders whose address must be reviewed before a label (see Review a Discogs address);
- **Messages to answer** — orders whose last Discogs message is the buyer's.

Under the order number, flag pills say why an order is there. Each is a word, never a colour alone:

Pill	Meaning
Oversold	Discogs sold a copy that ShopForge had already sold. The order is created and the stock is left as it is.
Unlinked item	An item of the order is not linked to a ShopForge listing, so it moved no stock.
Status conflict	Discogs moved the order where ShopForge cannot follow (see Status conflict).
Address to check	ShopForge could not read the address with certainty.
To answer	The buyer wrote last and waits for an answer.

To answer is amber, and turns red once the answer is overdue; the line **Answer by** and a day and time (for example "Thu 14:00") under it gives the deadline, four days after the buyer's

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message. The pills for oversold, unlinked item and status conflict are red; **Address to check** is amber.

When a synchronisation brings in an oversold Discogs order, a message tells you: "Discogs order {number} is oversold: resolve it", with **Open**. If several arrive at once, the first ones are announced one by one and the others together ("+{count} more oversold Discogs orders").

An oversold order is never cancelled by ShopForge on its own: the sale that took the copy first is kept, and you decide what to do with the Discogs order, for example cancel it on Discogs as "Item unavailable".

What the order window shows

Open a Discogs order and look for:

- the header: **Discogs order {number} ↗** opens the order on Discogs in your browser, and **Buyer:** gives the buyer's Discogs name;
- on an item, **Oversold: the copy was already sold** or **Not linked to a ShopForge listing**; an unlinked item cannot be opened as a product;
- in the payment section, **Paid on Discogs** in place of a payment method (the payment method of such an order is named **Marketplace (Discogs)**: the buyer paid Discogs, outside ShopForge), and **Discogs fee** with the amount and "cost of the sale, not charged to the buyer". Below, **For a partial refund, open the order on Discogs ↗** takes you to the order there;
- the delivery address in full, and **Address as sent by Discogs**, a section that opens to the text exactly as Discogs sent it;
- **Discogs shipping: {method} · {amount}**: the shipping the buyer chose and paid on Discogs. It is a hint: you still pick the shipping method yourself;
- **On Discogs: {status}**: the status Discogs gave the order at the last check.

ShopForge also passes the progress of the order to Discogs: starting to prepare sets it **In Progress** there, and marking it shipped sets it **Shipped** with the tracking number and carrier. If Discogs refuses a status, the order says "Discogs refused '{status}': {reason}". Nothing to retry: ShopForge tries again when the order changes.

Status conflict

When Discogs moves an order somewhere ShopForge cannot follow, or changes its items, the order shows **Status conflict: {reason}** in red. The reasons are:

- "Items changed on Discogs: check the order and adjust items and stock by hand."
- "Paid on Discogs, but cancelled in ShopForge."
- "{status} on Discogs, not applied: {detail}" — ShopForge could not apply a cancellation or a move Discogs made.

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- "Shipped on Discogs, but this order is “{orderStatus}” here: ship it here too."

Some of these end by themselves: "Clears by itself when the order catches up." — for example ship the order here after "Shipped on Discogs". Others never do, such as a change of items. Once you have fixed the order, choose **Mark as resolved**. It needs a connection ("Marking a conflict as resolved needs a connection."); a message confirms "Marked as resolved.".

Shipping a Discogs order

Prepare and ship it with the usual actions of Advance an order. Two things differ:

- **Carrier.** Where you type the tracking number, a **Carrier** list holds the carriers Discogs knows, with **Other** at the end. Pick the carrier before moving the order forward.
- **Review the address first.** If the order carries **Address to check**, generating the shipping label is blocked ("Review the address first") until the address is reviewed.

Review a Discogs address

Discogs sends the shipping address as one block of free text. ShopForge reads it into fields and, when it cannot be sure, the order says "Check the address before buying a label: ShopForge couldn't read it with certainty." with **Review address**.

1. Choose **Review address**. The window **Review the address** opens: on the left the text **Address as sent by Discogs**, read-only; on the right the fields ShopForge read, to compare and correct.
2. Correct what is wrong. The fields are **Recipient**, **Street**, **No.**, **Address line 2**, **Postcode**, **City**, **Country** and **Phone**. The street, the postcode, the city and the country are required.
3. Choose **Confirm address**. The flag is cleared and the shipping label can be bought. The correction is saved like any order change, offline too. The VAT of the order is decided again for the new address, as long as it has no invoice: see VAT of an online order.

Cancel closes the window and changes nothing.

Discogs messages

The **Discogs messages** section of the order, between the shipping and the history, holds the conversation with the buyer, oldest first: the buyer's messages on one side, **You** on the other, and Discogs' own status messages smaller and muted ("Discogs: {text}"). It is saved with the order, so you can read it offline. It says "No message on this order yet." when there is none, and "Data provided by Discogs." links to the order on Discogs.

To answer, type in the **Reply on Discogs…** box and choose **Send on Discogs**; the message goes to the buyer through Discogs. Replying needs a connection. Below the box, "The buyer is waiting for an answer." shows while the buyer wrote last. On a cancelled order the box is off: "This order is closed: reply on Discogs if needed." with a link to the order.

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Cancel on Discogs

On a Discogs order that is not yet delivered, completed or cancelled, **Cancel on Discogs…** replaces the ordinary cancel: cancelling only here would leave Discogs and ShopForge saying different things. It needs a connection.

The window **Cancel order {number} ({sfNumber}) on Discogs?** asks Discogs which types apply to this order ("Checking with Discogs…"), then offers:

Type	Effect
Item unavailable	Discogs removes the listing for good. The buyer may leave you feedback. No restock.
Buyer's request	Restocks in ShopForge.
Non-paying buyer	Negative feedback for the buyer. Restocks in ShopForge.

A type that does not apply to this order now is greyed out with "Not possible for this order now.". If the order is paid, the window warns: "This order is paid: cancelling refunds the buyer in full on Discogs." Choose the type, then **Cancel on Discogs**, or **Keep the order** to leave things as they are. A message confirms "Cancelled on Discogs. The order follows when Discogs confirms."; the order changes in ShopForge, and the stock returns where the table says so, when Discogs confirms.

Practice mode

While the Discogs channel is in practice mode (set in Discogs sales), ShopForge rehearses what it would send to Discogs and writes it in a practice log instead. The buttons say so: **Send (practice: not sent)** and **Cancel on Discogs (practice: nothing is sent)**, and a message confirms "Rehearsed: nothing was sent to Discogs.".

Related

- Point of sale — collecting payment in store
- Products — items on the picking list
- Offline & synchronization

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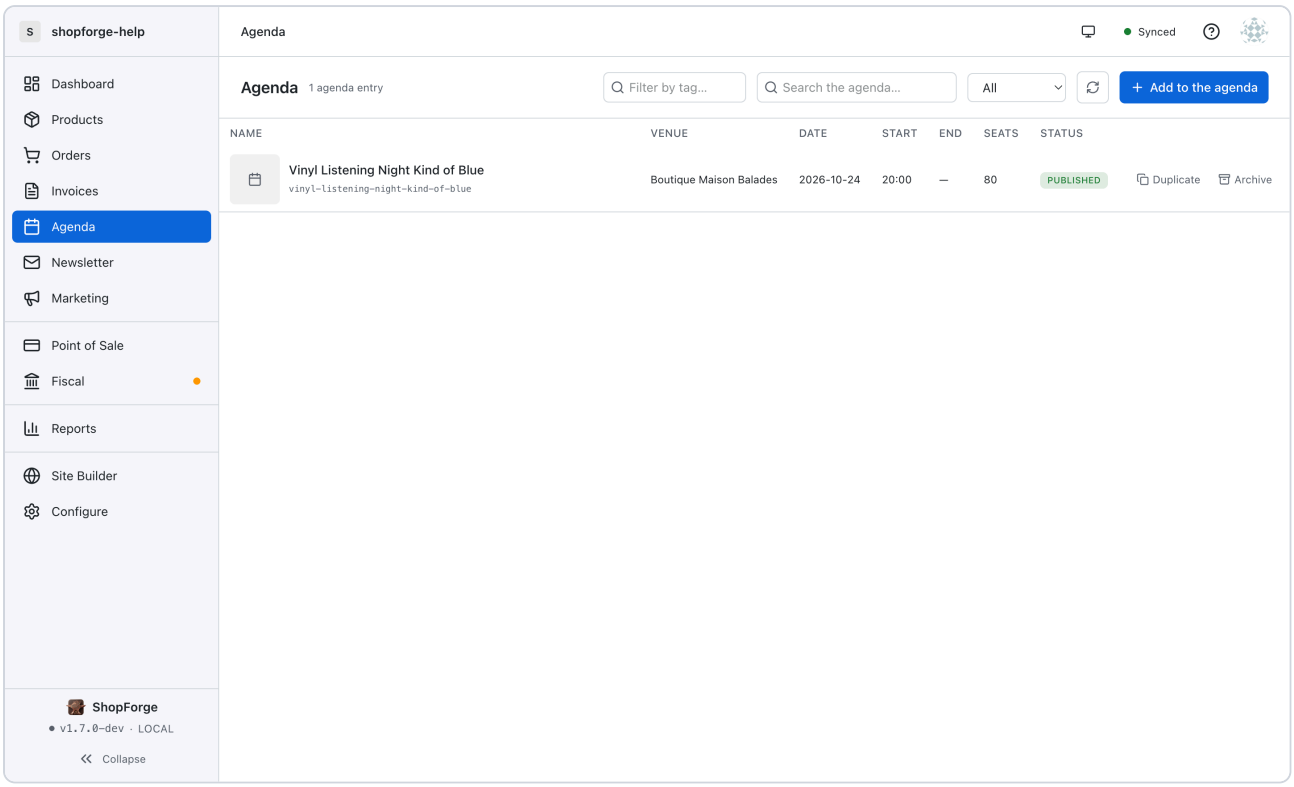
Agenda



Your shop's agenda lists what happens and when: gigs, showcases, sales, anything with a date. You manage it from **Agenda** in the backoffice — the list shows every agenda entry across your shop, and the storefront only shows the published ones.

The list runs against the shop's **local copy** (the same offline-first behaviour as products): it works without a connection, and edits are queued and synced in the background.

The agenda list

The **Agenda** tab offers:

- **Search** — by name or description, debounced as you type.
- **Filter by status** — All, Draft, Published, Cancelled or Past.
- **Tags** — filter by one or more tags (any selected tag qualifies).
- **Refresh** — forces a fresh download from the server.

Columns: Name (with description and slug), Venue, Date, Start, End, Seats, Status. Click a row to edit the agenda entry.

Every row has a **Duplicate** button, whatever its status (see Duplicate an agenda entry). The other actions match the status:

- **Published** agenda entries show an **Archive** button — moves the agenda entry to *Past*.

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- **Draft** agenda entries show a **Delete** button (confirmation required). It marks the agenda entry **Cancelled**; you can still open it and reinstate it.
- **Cancelled** and **Past** agenda entries have no row actions — click the row to edit them.

Status chips distinguish **Published** (green), **Draft** (grey), **Cancelled** (red) and **Past** (grey). The list caps at 200 rows — the "Showing {shown} of {total}" banner means you should narrow the search.

Create or edit an agenda entry

Use **Add to the agenda** (or click a row) to open the editor. The fields come in four groups, under the name, slug, status and tags:

- **Name** (required) and **Slug** — the slug is generated from the name when you create the agenda entry and becomes read-only afterwards.
- **Status** — Draft, Published, Cancelled or Past.
- **Tags** — select or create, like everywhere else.

When

- **Start date** (required) with an optional **Start time**, then **End date** with an optional **End time**. Leave the **End date** empty for an agenda entry that happens on one day. For a festival or any entry over several days, set the **End date** to its last day: it is still one agenda entry. An **End date** with no **End time** ends at 23:59 of that day. The end cannot be before the start: the editor says "The end must not be before the start." and **Save** waits. A night that runs past midnight, ending the next day at 05:00 or earlier (21:00 to 02:00), is still one day for the calendar and the lists.

Where

- **Location type** — **In the shop** or **Outside the walls**, then the shop or the venue and its address; see Where it takes place.

Booking

- **Booking link** — optional link to your ticketing page. It shows a booking link on the agenda; leave it empty if there is nothing to book.
- **Seats** — optional number of seats. They are shown on the agenda next to the venue; leave it empty to show nothing.

Content

- **Description** — optional, Markdown editor.
- **Images** — optional. Paste an image URL or upload files, as for a product; the first image that has not failed is the main one. See Images.

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Like products, agenda entries are saved locally first and synced in the background; the confirmation means "queued", not necessarily "on the server" yet.

The editor's **Delete** action asks for confirmation, then marks the agenda entry **Cancelled**. It is not erased: you can still edit it and reinstate it.

Duplicate an agenda entry

Duplicate (on each row of the list, and at the bottom of the editor) opens the **Add to the agenda** editor filled with a copy of the agenda entry: its fields, tags, location, booking link, seats, texts and pictures. The copy is a **Draft**, its name ends with "(copy)", its slug is generated from that name, and the dates are kept for you to change, for the next date of a recurring event for example. Nothing is saved until you click **Save**, and the original is not changed. Duplicating from the editor copies the saved agenda entry, not the changes you have not saved yet.

Where it takes place

Each agenda entry is either **In the shop** or **Outside the walls**.

- **In the shop** — pick the **Shop** from the list: your active shop Locations only (a Pro Client or Outside Walls location is never offered). The entry has no address of its own: the venue name and address are read from the shop every time, so renaming a shop or correcting its address updates every agenda entry held there. A shop that is deactivated no longer appears in the list, except on an entry already held there, which keeps showing its own shop.
- **Outside the walls** — type the venue name and a full address (line 1 and 2, city, postal code, country). A map previews the address as you type.

An agenda entry saved before this choice existed is read as **Outside the walls**.

A shop cannot be deactivated while published or upcoming agenda entries are held there: "This shop has agenda entries in it. Move or delete them first." Past and cancelled entries do not block it.

Statuses

- **Draft** — work in progress, not visible on the storefront.
- **Published** — live: shown on the storefront calendar.
- **Cancelled** — the agenda entry is not happening; not visible on the storefront. Cancelled is not final: a cancelled agenda entry can still be edited, and set back to **Draft** or **Published** — for example when the agenda entry is postponed, change its date and publish it again rather than creating a new agenda entry.
- **Past** — the agenda entry happened; **Archive** moves a published agenda entry here. Past agenda entries stay visible on the storefront.

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On the storefront

The site shows **Published** and **Past** agenda entries (drafts and cancelled agenda entries are never public). Ticket sales happen on your external ticketing page through the **Booking link** — the storefront links out to it. The agenda entry page shows a **Book** button for it, and the number of **Seats** when you gave one, until the agenda entry has taken place; see Agenda entry hero. An agenda entry over several days is shown with its first and last day.

Related

- Shop Locations — admin — the shops an in-the-shop agenda entry is held in
- Tags — configure — label and filter agenda entries

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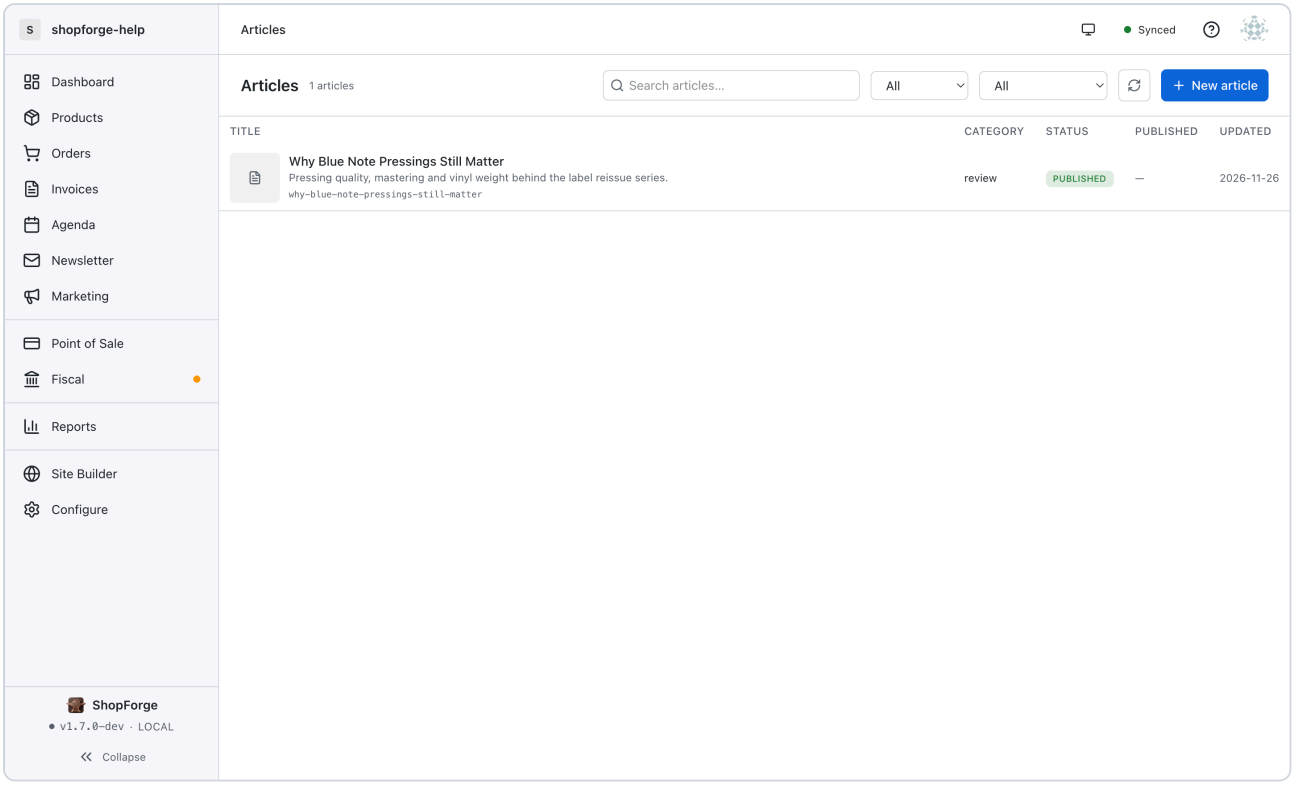
Articles



Articles is where you write news, reviews, guides and announcements connected to your shop. Each article has a category, a status, an optional cover image, and SEO fields.

Opening the articles list

There is no **Articles** entry in the sidebar yet, because the storefront does not render articles in this version. If your shop has shared the page address or you saved a bookmark, open it directly — the page itself is fully usable.

The list offers:

- **Search articles...** — free-text search as you type.
- **Filter by status** — All, Draft, Published or Archived.
- **Filter by category** — All, News, Review, Guide, Spotlight or Announcement.
- **Refresh** — forces a fresh download from the server.

Columns: Title, Category, Status, Published and Updated. Click a row to edit the article. If the list caps at "Showing {shown} of {total}", narrow the search.

Create or edit an article

Use **New article** (or click a row) to open the editor:

- **Title** (required) and **Slug** — a URL-friendly name. On a new article the slug is filled from the title as you type, and it is required; once the article exists it is read-only.
- **Excerpt** — a short summary, up to 300 characters.
- **Body** (required) — the full article, written in Markdown.
- **Images** — an optional cover: paste an image URL or upload a file. The first image that has not failed is the cover; the storefront does not show articles yet. See Images.
- **Tags** — select or create.
- **Category** — News, Review, Guide, Spotlight or Announcement.
- **Status** — Draft, Published or Archived.
- **SEO title** and **SEO description** — optional page title and meta description for search engines.

The **Published** date follows the status. The Delete action asks "Delete "{title}"? This cannot be undone."

Statuses

- **Draft** — work in progress.
- **Published** — marked as ready and visible. Note that the storefront does not render articles in this version, so publishing changes nothing public yet.
- **Archived** — no longer current.

Offline behaviour

Articles follow the same offline-first pattern as products and agenda entries: the list runs against the **local copy**, and edits are queued and synced in the background. "Article saved." means the change is queued, not necessarily on the server yet.

Related

- System config & POS — admin — the default status applied to new articles

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Point of sale

The till for in-store sales. It keeps working **offline**: every sale is signed locally and queued, then synced when the connection returns. It is split into four tabs — **Terminal**, **Receipts**, **JET Journal** and **End of day** — and every receipt is a signed fiscal record (ShopForge is designed to meet the ISCA conditions, art. 286, I-3° bis CGI).

Before you start

To open a register the shop needs, at minimum:

- **One location** — add it in Configure → Locations.
- **Fiscal settings** — configured for the register's country in Configure → Fiscal. Without them the open screen shows a banner: "Fiscal settings have not been configured for this register. Go to Configure → Fiscal to set them up before opening a session."

Open register

1. Go to **Point of Sale → Terminal**.
2. Choose the **Location** the register sells at.
3. Enter the **opening float** (can be `0`). Type it with a comma or a dot (`120,50`). When your configuration lists denominations, tick **Count by denomination** beside **Opening float** and enter a quantity per note and coin instead: the total adds up as you type and is signed with the session. After a close that left a float, the screen says "Left in the drawer at the last close: {amount} €."
4. Click **Open register**.

The hour is recorded as a signed `CASH_SESSION_OPEN` entry, with the location's name and type.

The Location list offers the shop's active locations: the default shop first, then the others from A to Z. A shop is shown with its city; a Pro Client or Outside Walls location, set up in Configure → Locations, with its type, for example "Fair stand — Outside Walls". Choose one of them when the register sells away from the shop: at a fair, a market, a client's premises. After a day out, the next opening does not preselect that location again: it preselects the default shop, so a session in the shop is never opened "Outside Walls" by mistake. A shop you chose last time is remembered as before.

The register refuses to open at a location that is no longer active ("This location is no longer active. Choose another one, or reactivate it in Configure → Locations.") and at a Pro Client or Outside Walls location outside the default shop's country ("A till type must be in the default shop's country. Check its country in Configure → Locations."). During the session, the header

shows **Location:** with the name and, for a Pro Client or Outside Walls location, its type. If the app is closed and reopened with a session still open, it resumes that session automatically — you do not start a second one.

What the open screen tells you. Before you press **Open register**, the card shows where this register stands:

- the **business day** the session will belong to, and the date of this register's last session or closure;
- the **last daily closure** (Z): its number and day, whether the server has received it (*held by the server*, *not yet sent*, or *sending failed*: a closure that failed is not resent on its own, use the retry in the sync indicator), and whether a full archive contains it (an archive whose last chosen day is that day contains it; a filtered auditor export is not a full archive). These are information, not a block — you can open a register whether or not they are settled;
- the **software version**, the fiscal version and the configuration the session will be signed with, small, at the foot of the card;
- a **warning** when the date would be refused: this device's clock is behind the register's last business day, the day is already closed, or the clock is ahead of the server's. The warning offers the day a manager can open on instead, as it does after pressing the button;
- a **notice** when an earlier business day has no daily closure (Z), as long as **Refuse sales while a daily closure is missing** is on (it is by default, see POS offline settings): "The Z report of {date} has not been made. Close that day in the End of day tab before selling. Refunds, cash movements, closing the cash session and the closures remain possible." It names the oldest day owed and has a **Go to the End of day tab** button. It replaces the usual reminder for that day. It does not stop you from opening the register: only the sale is refused (see Complete a sale).

A session left open overnight cannot sell the next day. The business day runs from 04:00 to 04:00 (**Business day starts at**, from 0 to 11, in the fiscal settings, for a shop that trades later). When the register finds a session from a previous business day, it shows a message instead of the checkout: close that session — count the cash, and give a reason if the count differs — then open a new one. Until then nothing can be sold in it, so a day's takings never end up on the previous day's closure. Receipts and the X report remain available.

Cash in and cash out

Cash put into the drawer or taken out of it outside a sale — change from the bank, a payment to the postman — is recorded from the menu of the session header (not on the checkout screen, so a shop that never needs it never sees it): **Cash in / Cash out**.

1. Choose **Cash in** or **Cash out**.

2. Enter the **amount** (above zero) and a **note** saying what it is for (required, up to 500 characters).
3. Click **Record**.

The movement is signed, kept with the session and counted in its **expected cash** — cash in adds, cash out subtracts. It cannot be edited or deleted: to correct a mistake, record the opposite movement. Pressing **Record** twice, or again after an error, records it once. A session left open from a previous business day records nothing new; close it first.

The cash drawer sheet

The **Cash drawer** button of the session header opens the drawer sheet. At the top: the **opening float**, the **cash sales**, the **cash refunds** and the **expected cash** — what the drawer should hold now. Below it, the actions: **Cash in**, **Cash out**, **Petty cash**, **Safe drop**, **Variance adjustment**, **Count the drawer**, **Open (no sale)** and **X report (closes nothing)**. Then the **activity**: the float, every movement, count, opening and cash received from another till, in order, each with who did it, when, its effect on the drawer, and the cash the drawer should have held right after it. Cash sales and refunds are not listed one by one — they are in the running figure and in the totals above.

The movement form asks for a **type**, an **amount**, a **reason** from the list your administrator set for that type (Configure → System → Cash drawer), a **note**, and, for petty cash, the **receipt or invoice** it paid for. A variance adjustment also asks whether the drawer holds **more** or **less** than expected. When your administrator requires it for a type — always, or above an amount — a **manager's approval** is asked for before the movement is recorded, and is signed with it. A movement not yet sent to the server says so on its line.

Count the drawer

To check the drawer without closing the session, open the menu of the session header and choose **Count the drawer**. Count what is in the drawer — by denomination when your configuration lists them (a quantity per note and coin, the total adds up as you type), or as one amount — add a note if you like, and click **Record the count**. Only then does the register show the cash it **expected**, what you **counted**, and the **difference**. A count is signed and kept with the session; it closes nothing and changes nothing, so if the drawer differs, check it, or record a cash movement for what was left out. Counts appear in the session summary and in the Z report's day's detail.

Open the drawer without a sale

To open the drawer outside a sale — to make change, at a customer's request, to check it — choose **Open the drawer (no sale)** in the same menu and give the **reason**; for **Other**, a note is

required. The opening is signed and kept with the session, and counted in its summary. Like a cash movement, neither a count nor an opening is possible on a session left open from a previous business day: close it first.

Hand the register over

When another seller takes over during a shift, nobody closes the session and nobody logs out: open the user menu and choose **Switch user** (see Switch user). The new person confirms with their **PIN** or their **password**. Online, an employee with a PIN uses it, and an administrator or someone with no PIN uses the password. Offline, everyone uses their PIN, an administrator too.

- **The session stays.** The register's open cash session is still the one whoever opened it opened; whoever closes it signs the closing. The screen, the drawer and the sales so far are untouched.
- **A basket in progress** goes on with the new person: they complete it, and the sale is signed with **their** name.
- **Not during a payment. Switch user** is disabled, "Not while a payment is in progress.", while a sale is being signed or a PayPal QR code is open.
- **Offline,** the new person signs in with their PIN. When the connection is back, the register asks them for their password once (see Working offline): until then their sales wait, and the sales of the people who handed over before are sent with the next sign-in.
- **Three wrong entries** block that person for five minutes, on every screen of this computer.

Close register

Click **Close the cash session** in the session header. The **Closing control sheet** opens: every figure on it comes from this register's own records, so it works offline. From top to bottom:

1. **Session** — location (with its type, for a Pro Client or Outside Walls location), register, operator (**Former employee** when that user has since been deleted; the session history and the JET Journal show it the same way), session number, when it opened, the business day, the software and fiscal versions, and the time this register spent offline during the session.
2. **Sales** — gross sales, discounts, net sales, VAT by rate, and the counts of sales, refunds (of which store credit) and cancellations. Training records are counted apart and excluded. The X report shows the same gross sales and discounts.
3. **Payments** — **count the cash**, by denomination (a quantity per note and coin, when your configuration lists them) or as one amount, next to the cash the register expects. **Declare** the cheques and Chèque Culture you hold: the difference is shown for information and never blocks the close. Card, PayPal, transfer and store credit are not counted, since nothing changes hands: the register shows what it expects and asks nothing of you.

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4. **Cash movements** — the float, the cash sales net of refunds, each kind of movement, the cash received from other tills on its own line, and the formula of the expected cash; plus how many drawer counts and no-sale openings the session had.
5. **Variance** — counted less expected. When it is not zero, give a **reason** from the list your administrator set (Configure → System → Cash drawer), with a note if you like. When the variance is above the threshold your administrator set (€10 unless changed), a **manager's approval** is asked for before the register closes the session, and is recorded with it.
6. **Float to leave in the drawer** — tick it to leave a float for the next session (the opening float by default, or the amount you type, with a comma or a dot) and drop the rest in the safe. The register records that drop as a *closing safe drop* just before the close: it is listed with its amount on the X report and the Z, but it is out of the expected cash — the variance is computed on what you counted, before the drop. If your administrator requires an approval for safe drops, a manager approves this one too. The float cannot exceed the counted cash ("The float cannot exceed the counted cash ({counted}).") and must be an amount ("The float isn't a valid amount. Type it like 120,50, or clear the field to keep the opening float."). The next session's opening screen proposes the float left.
7. **Checks** — how many of this register's records are not yet sent to the server (a warning: the session still closes offline), and how many sales of the session never had a receipt issued; the register records each of those at the close.

Click **Close the cash session**. The register signs everything in one go — the closing safe drop, the close with the count, the declared cheques and Chèque Culture, the variance, its reason and approval — and the **Session closed** window offers the **session summary**: *Issue the summary now* saves it as a PDF; *Later* leaves it available from the session history. **Continue to End of day** opens the **End of day** tab (see Z report).

Cash not counted: transfer to another till. Choosing it replaces sections 3 to 6 of the sheet. Shops often share one cash bin between tills. When another till of the **same location** is still open, a till that closes can hand it its cash instead of counting it; the till that closes **last** counts everything. This option appears only when such a till is open. To protect the cash it is offered only when:

- this till is **online**, and has just **synced** (the dialog does this when it opens). Otherwise it is greyed out with the reason, and you count the cash;
- the other till is open on the **same business day** and has been **seen by the server in the last 15 minutes**. A till that is not fit stays in the list, greyed out with why ("not seen for 3 h", "opened on ..."), and cannot be chosen. A till taken home stops being seen, so the cash can never be handed to it;
- there is cash to hand over, and this session is a real one (not a training session) opened at a location.

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Choose the till and click **Hand over and close**. The whole expected cash — including the float and anything this till received — is handed over in one signed transfer. The session closes **not counted** (no counted cash, no variance) only once the server has confirmed the transfer. **Close the tills one at a time:** a till that has handed its cash over is no longer offered to the others, and if two tills choose each other at the same moment the second transfer is flagged in Fiscal → Closures rather than lost. If the server is slow to confirm, the session stays open with the transfer recorded, and the sheet offers **Finish closing**: the transfer is never made twice.

If cash is added to a till after its transfer was recorded (a sale, cash in, or cash another till handed to it), it can no longer close without counting: the sheet says so, shows the cash that is left, and you count it.

The other till adds the transfer to its expected cash and must count it. A transfer that reaches the server after the other till has already closed (an offline or racing till), or to a till that has itself handed its cash over, is accepted but flagged in Fiscal → Closures (*Late transfer flagged*): that cash is outside the other till's count, and someone should look at it. This is the limit of the design.

A session left open from a previous business day is closed by counting only; it may still leave a float in the drawer.

X report

An **X report** is a snapshot of the session open on this register: what has been sold so far, how it was paid, and how much cash should be in the drawer. It is the "where do we stand?" button of the till. Reading it **closes nothing and changes nothing**: it is not a Z report and not a fiscal closure, and you can read one as often as you like. The day's **Z report** (End of day tab) is still to be made.

When to use it

- during the shift, to check the takings, or what the drawer should hold before a cash pick-up or a handover to a colleague;
- before closing the cash session, to see the **expected cash** you will count against;
- at a change of shift, to give the next person a sheet to start from;
- when a cash count does not match, to see what the expected cash is made of.

How to read one

1. Open the menu in the session header and choose **X report (closes nothing)**.

2. The report shows, for the session:
   - **Session**: its number, the register, when it opened and its business day;
   - **Sales**: the number of transactions (sales, refunds, cancellations), the net total with and without tax, and the VAT for each rate. Donations and gift cards sold are not in the VAT rows: a row **Donations, outside the scope of VAT** and a row **Gift cards, VAT due when used** give their number and their amount, net of refunds;
   - **Payments**: what was taken with each payment method;
   - **Cash**: the opening float, the cash sales net of refunds, each kind of cash movement (cash in, cash out, handed to another till…), the cash received from other tills, and the **expected cash in the drawer** — the same figure the close dialog counts against.
3. **Refresh** reads the session again.
4. **Save as PDF** makes a document, named `rapport-x-<date>-<reference>.pdf`, with «RAPPORT X — non clôturant» in its header and on every page, so a page of it is never mistaken for a Z. **Print** and **Send by email** sit beside it (see Print and send by email).

What is kept

- Every reading is written to the **JET journal** (*X report generated*), so an auditor can see when reports were read and by whom.
- Every PDF is a document **issue** with its own reference (T1, T2…), which is printed on it. A PDF is made from a fresh reading, so its figures can differ from the screen you were looking at a moment before; the dialog then shows the reading the PDF was made from. An X report is never a duplicata.

Good to know

- It covers **this register's open session** only, not the other tills or the whole shop.
- It is still available when the register shows the "session from a previous business day" message: useful to read before closing that session.
- In a **training session** it says so, and its figures are not takings.

Print and send by email

The X report, the session summary, and the daily, monthly and annual closure documents each offer three actions, side by side: **Save as PDF**, **Print** and **Send by email**. You find them in the X report dialog, on a closure's document, on a session's row in the session history, and in the *Session closed* dialog. Each produces the same document, and each counts as an **issue** of it: the first is the original, every later one a **duplicata** (you are asked why), as for a PDF.

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- **Print** opens the print dialog with the document, on the paper this computer is set to: an A4 page or an 80 mm receipt printer (see Preferences). It is issued only once the printer accepts the job: if you cancel the dialog, or printing fails, nothing is issued, and the next print is still the original. When it works, a message says *Printed* with the issue's reference.
- **Send by email** asks for an **Email address** and sends the document as a PDF attachment, through your shop's **Email (SMTP)** integration, which an admin sets up in **Configure → Integrations**. The server keeps a copy of the document and records the sending in the JET Journal. The JET Journal keeps the address only as a fingerprint; the server's delivery record keeps it, so that the send can be traced. The document is issued once the email has gone; if the server could not send it, nothing is issued, the failure is recorded, and you can try again.
- **Send by email needs the server.** Offline, the button is disabled and says why; print or save as PDF instead.

A few things can stop a send:

- A document whose session or closure has not reached the server yet is refused until the register has synchronised.
- A shop can send at most 100 documents an hour; past that, wait for the next hour.
- If the server stopped in the middle of a send, the register says the previous attempt's outcome is unknown: the email may have been sent. Check with the recipient before you send again.

In the rare case the email went out but this register could not record it, a message says so: the email was sent and the server's journal has it.

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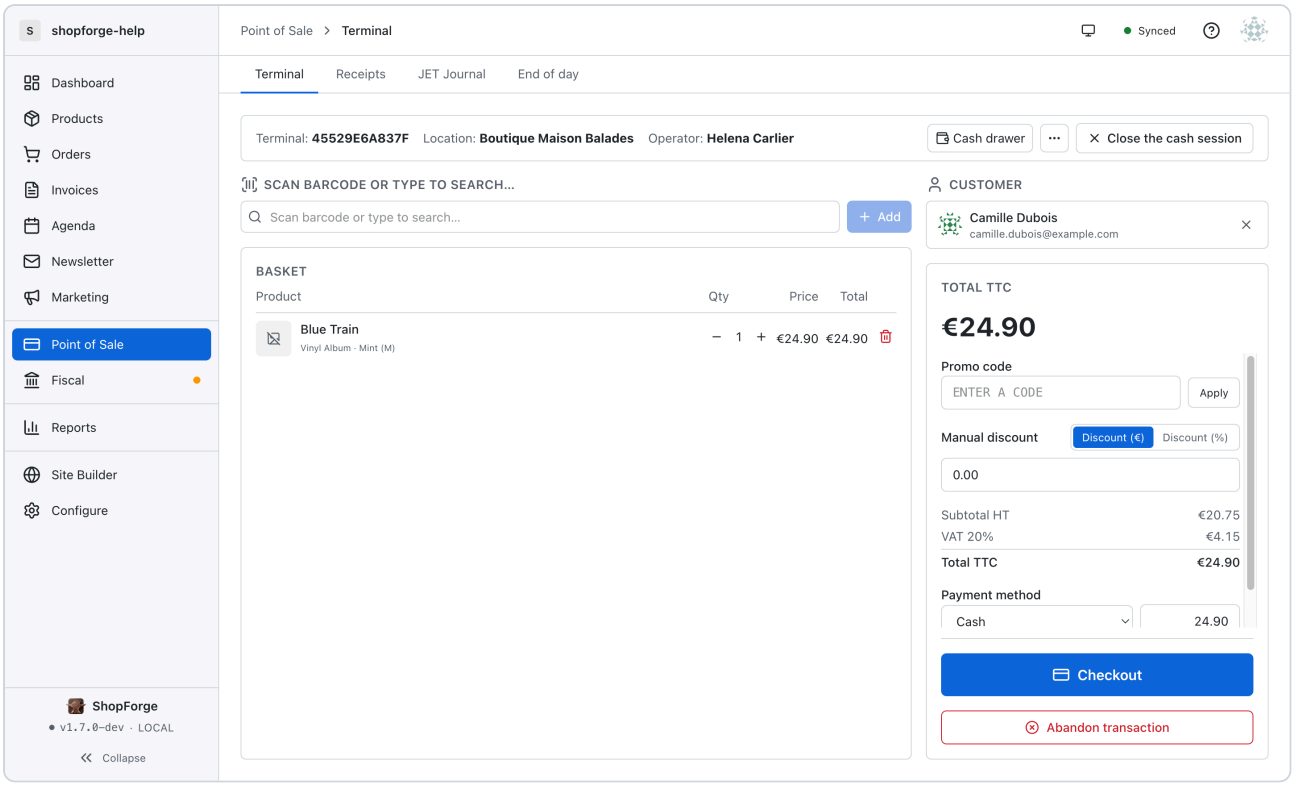
Complete a sale



1. **Scan or search** — the search box accepts a barcode or a typed search (min. 2 chars). Add lines to the basket.
    - Typing part of a barcode works too: if no product name matches and no barcode is an exact match, the list shows up to 20 products whose barcode *contains* what you typed (spaces are ignored). Scanning a full barcode still adds exactly that product.
    - Unknown barcode → "Product not found for this barcode".
    - Product without a price → "Product has no price set".
    - **The scanner and the computer must use the same keyboard layout.** A USB barcode scanner types like a keyboard: it sends the barcode as key presses, so the computer reads them with its own layout. ShopForge does not translate layouts and has no setting for it.
        - *Symptom:* the search box fills with the wrong characters. Digits come out as symbols (`3350033746206` shows as `##%))##&$^@)^`) and letters are swapped (`PROMO20` shows as `PRO:O@)`).
        - *Cause:* the scanner is set to French (AZERTY, where the digit row needs Shift) and the computer is on a US layout, or the reverse.
        - *Fix:* change the computer's layout to the scanner's (macOS: **System Settings → Keyboard → Input Sources**; Windows: **Settings → Time & language → Language & region → Keyboard**), or set the scanner to the computer's layout with its programming sheet ("USA keyboard" / "French keyboard"). Keep that layout selected at the till.
        - *Quick test:* click in any text field (a notes app) and scan. If you see the barcode digits, the layouts match.
        - EAN/UPC (digits), Code 39 and Code 128 (letters) were checked. The scanner must send Enter after the barcode; that ends the scan.
    - **A sale holds at most 250 lines** (250 different items; a line with a quantity of 5 counts once). Adding a 251st line is refused, and the basket says so: complete this sale, then start a new one for the rest. Raising the quantity of a line already in the basket is always allowed.
2. **Adjust the basket** — change quantities, remove lines.
    - If a line is reserved for a pending online order, a warning banner appears: selling it now may force that online order to be cancelled. Check the stock before proceeding.

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3. **Customer (optional)** — attach a customer by name or e-mail, or create one. Without one the sale is a **Walk-in sale**. A sale that includes a **membership** needs its customer: the register refuses payment without one (see Selling a membership at the till): "Attach the customer who buys this membership before taking payment." A membership is sold one at a time ("A membership is sold one at a time. Set the quantity to 1, or ring a second sale for a second term."), and one whose tier this register does not have is refused until you sync the register or ask a manager ("This membership is not available on this register (its tier is missing)...").

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4. **Discounts** — apply a **discount card**, a **promo code**, a **manual discount**, or use **store credit** (deducted automatically until **Remaining to pay** reaches 0).

   - The **Discount card** comes from the customer's memberships: the highest one still running, read with this computer's clock, so it works offline. An ended membership gives no discount and nothing is shown to say why (a "membership expired on" notice: *proposal, pending owner confirmation*). A membership that ends while the basket is open stops applying when you click **Checkout**, so the amount to pay can change at that moment. The manual discount is taken on top of the card discount. See Memberships.
   - **Promo code.** Type the code in **Promo code**, then press Enter or click **Apply**. Spaces and capital letters do not matter. A sale takes one code. The register checks the code on its own copy of the codes, so it works offline; a code created after the last synchronisation is "unknown" until the next one. The code takes its discount off the lines it covers (its dates, location, category, tags and sale-item rule), and the code and the amount taken off show in the totals. If the code is refused, a message says why and the sale stays as it was: "Unknown code. A code created a moment ago appears here after the next sync."; "This code is not valid yet."; "This code has expired."; "This code is not valid at this location."; "This code is valid online only."; "This code does not apply to this kind of sale."; "A code is already applied to this sale."; or, when no line is covered, "This code does not apply to anything in the basket." with, as the reason, "A promo code does not apply to gift cards, memberships or donations.", "This code applies only to certain products, and none is in the basket." or "This code does not apply to sale items." Click **Remove** to take the code off before payment.
   - **Order of the discounts.** The card discount comes first, then the promo code, then the manual discount, each on what is left of the step before. A **percentage** manual discount is therefore a percentage of what is left, with or without a code. Example: a basket of 100.00 with a 10 % card discount, a 5.00 code and a 5 % manual discount comes to 80.75; without the code it comes to 85.50.
   - **When the code is checked again.** The code is checked again when you change the basket and when you change the customer (the card discount, and so the amount of the code, can change). If no line is covered any more, the code is left out of the sale: it stays shown on the sale, highlighted with the hint **Applies to nothing**; the price and the ticket are those of a sale without a code, and it applies again if an eligible line comes back. A code that stops applying for another reason (for example it has ended) is removed with a message that says why. It is checked once more when you click **Checkout**. A code that applies to nothing changes nothing there: the sale is made at the price you see, as a sale without a code, and no discount is recorded for the code. If it has stopped applying for another reason since (for example it has just ended), the sale is not made, the code is removed and the total changes; check the new total and click **Checkout** again. If this register cannot check the code at that moment, the sale is not made either: try again, or remove the code.

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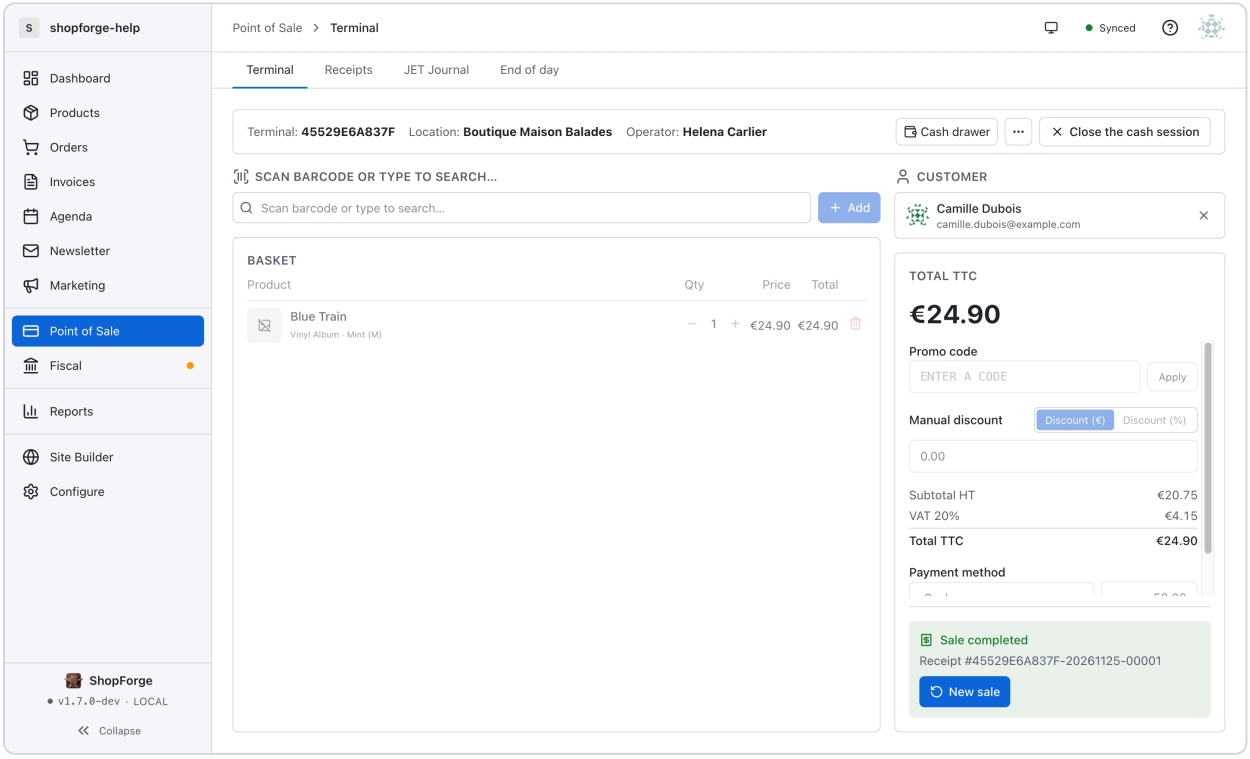
- **On the ticket.** The discount line of the receipt names the code, after the card discount and before the manual discount, for example "Remise 19.25% (carte 10% + code SPRING-10 + manuelle 5%)". The wording is the owner's to confirm. *(Proposal, pending owner confirmation.)* A refund gives back what was paid for the returned lines; the code itself is not touched and can be used again.

5. **Take payment** — enter one or more payment lines (Cash, Card, Cheque, Culture cheque, Transfer, Gift card (see Gift cards at the till), and PayPal when the shop offers it: see Pay with a PayPal QR code). Non-cash lines may not exceed the remaining amount. Cash may exceed it (the overage is shown as change), but not when the other lines already cover the amount: the till then says "The other payments already cover {total}: remove the cash amount." Store credit, when applied, reduces what remains to pay.

6. Click **Checkout** — the sale is signed locally and you see "Sale completed" with the **Receipt # {number}**, then **New sale**.

   When you click **Checkout**, the register reads the customer again. If their membership or store credit changed since you attached them (a sync meanwhile), nothing is signed: the till shows the new amount and says "This customer's membership or store credit changed, so the amount to pay changed. Check it and try again." If the register refuses the member discount itself, it says "This customer's membership changed during the sale: remove the customer and attach them again to update the price."



On a large window the right-hand panel (customer and totals) scrolls when it is taller than the window: the total stays in view at the top, and **Checkout** at the bottom. Just above **Checkout** you see why it is unavailable, or the change to hand back. When the window is under 700 px high, **Abandon transaction** moves to the end of the scrolling part.

Second-hand copies. A second-hand copy is sold under the margin scheme. The totals list its VAT on its own row, "Margin VAT {rate}%", apart from the normal "VAT {rate}%" row of the same rate.

Sale refused: a daily closure is missing. While **Refuse sales while a daily closure is missing** is on and an earlier business day has activity on this register without a daily closure, **Checkout** is refused with "The Z report of {date} has not been made. Close that day in the End of day tab before selling. Refunds, cash movements, closing the cash session and the closures remain possible." and no store credit is deducted. Close that day in the **End of day** tab: the refusal lifts at once; there is nothing to dismiss.

If a customer with an email on file was attached to the sale, the receipt is **emailed automatically**. For a walk-in sale (or to resend), open the receipt from the **Receipts** tab and use **Send via email** — type any address and send — or **Print** it, or save it with **Save as PDF** (see Receipts). **Abandon transaction** clears the basket and records the abandoned attempt.

Gift cards at the till

A gift card is a code with a balance and an expiry date. At the till it can be **used to pay** and **sold**, both with no connection: the register keeps its own copy of the cards.

Pay with a gift card

1. In **Take payment**, choose **Gift card** for a payment line.
2. Type or scan the card's code in **Gift card code**, then press Enter or click **Use this card**. The row then reads "Card …{tail}, balance {balance}": the code is never shown back, only its end.
3. Set the amount of the row: more than zero and not more than the card holds. Anything still to pay goes on another payment line. Several cards can pay one sale, one row each.
4. Click **Checkout**.

The register tells you what is wrong: "This code is not valid.", "This card is already on the sale.", "Enter the gift card's code for the gift card row.", "A gift card row must be more than zero and not more than the card holds." A gift card pays the goods only, never a gift card or a donation: "A gift card pays the goods only, never a gift card: lower the gift-card row." If **Checkout** finds the card unusable, the sale is not made: "The gift card could not be used for this sale: check the code, the balance and the expiry, and try again."

When a sale paid with a gift card is refunded or cancelled, the receipt says where the money goes: "The money goes back as follows: …", with each card's share going back to the card ("{amount} to gift card {card}"). The payment of such a sale cannot be corrected ("A gift card paid this sale: its payment cannot be corrected. Cancel the sale and ring it again."). A line that sold a gift card is refunded or cancelled as a whole line only, and a sale that sold a card that has since been used or cancelled cannot be refunded or cancelled at the till: ask your administrator.

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Where a card's share goes, in a refund. When a refund of a sale paid with a gift card is entered, the form lists each card of the sale with a choice: **Back onto the gift card** (preselected; the card keeps its expiry date) or **As store credit**. The customer decides and you record their choice; the summary then says where the money goes ("{amount} to gift card {card}", or "{amount} Store credit (for gift card {card})"). Store credit belongs to a customer, so attach the customer first: without one, the refund cannot be signed. If a card has expired or been cancelled, there is no choice: the form says "The gift card has expired: refunded as store credit." or "The gift card was cancelled: refunded as store credit.", and its share goes to the customer as store credit. For an expired card the form also shows, below, a sentence to read to the customer: it explains that the card expired and that refunding to it would lose the amount, so the refund is store credit. It is the explanation of the refund email, worded "this purchase" instead of "this order"; a cancelled card shows none. Cancelling a whole sale gives each card its share back, as taken.

Sell a gift card or a donation

Add the gift card or donation product to the basket like any other line. When the customer chooses the amount, the register asks for it: "Amount of the gift card "{name}"" (or "of the donation"), "Amount in euros, e.g. 25.00". Click **Add the card** (**Add the donation**), or **Cancel**. An amount outside the bounds, or with more than two decimals, is refused, and so is a second entered amount of the same product: it is sold one at a time. A basket that is full ("The basket is full.") takes no more.

- A gift card or a donation takes no discount, and no promo code applies to it.
- A gift card cannot pay for a gift card or a donation.
- A donation is **outside the scope of VAT**: its line carries no VAT, whatever the shop's VAT settings say, and the receipt, the X report and the Z report show it apart from the VAT rows (see Receipts).
- A gift card product without a validity period is refused: "This gift card has no validity period yet: ask your administrator to set it." A product the register does not know is refused until you sync: "This gift card or donation product is not known on this register: sync and try again."
- A card sold at the till is made on the register and can be used at once. Right after the sale, the till prints a **slip** for each card sold, once: reprinting is not offered. The slip reads « Document non fiscal » ("Non-fiscal document" in English), so it never passes for a receipt. A donation issues nothing.

Pay with a PayPal QR code

The customer pays with PayPal by scanning a QR code shown on the till with their phone. The code opens in a window that covers the screen. The till takes the money itself as soon as the customer approves, and the sale then goes through as usual.

Before you start

- **PayPal** is in the payment list only when an administrator has switched on **Offer PayPal by QR code at the till** and PayPal is the shop's active payment provider (Configure → Integrations, see Integrations). Otherwise it is not listed.
- PayPal needs the connection. Offline, the entry stays in the list, greyed out, and the reason shows under the list: "PayPal needs the connection: offline, take another payment method."
- A sale holds one PayPal payment, for at least 0.01 € and at most what remains to pay after the other payment lines.

Take a PayPal payment

1. In **Take payment**, choose **PayPal** for a payment line. The line takes what remains to pay after the other lines, and the QR window opens straight away: **To collect by PayPal** and the amount, the code, and **Valid for** counting down (how long a code lasts is set by an administrator, 10 minutes by default).
2. Ask the customer to scan the code with their phone and approve the payment in PayPal.
3. The till asks PayPal every few seconds. When the customer has approved, the window shows **Confirming the PayPal payment…** and the till takes the money. The X is unavailable during these seconds.
4. When the money is taken, the window shows **Payment received** and the amount for a second, then closes by itself, and a notice says "PayPal payment received" with the amount. The PayPal line is now locked: its amount and method cannot be changed and it cannot be removed. Items can still be added to the basket, but not removed or reduced ("PayPal payment taken: add items, or cancel the sale"). Anything still to pay goes on another payment line.
5. Click **Checkout**. The sale is signed with PayPal as one of its payment methods.

The QR window

- **It covers the screen.** Nothing behind it can be used, a barcode scanned meanwhile is ignored, and **Esc** and a click outside do nothing: closing the window cancels the payment, so it cannot happen by accident.
- **The X on the right is the only way out, and it cancels.** Under the code the window says "Closing this window cancels the PayPal payment." The X asks for no confirmation: nothing is charged by cancelling, and a new code is one choice away.
  - The PayPal payment is set aside, a notice says "PayPal payment cancelled", the window closes and the PayPal line leaves the sale (a sale with only that line goes back to **Cash**). The amount still to pay is unchanged. Choose **PayPal** again for a new code.
  - The X is named **Cancel the PayPal payment** while it cancels something, and **Close** once nothing is left to cancel: a code PayPal has already closed, a payment PayPal is holding, or a training payment.

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- **The X is unavailable while the till takes the money, or waits for PayPal's answer.** If the answer is lost, the window says **PayPal did not answer. Try again.** and offers **Customer pays another way**, the only other way out: it does what the X does. Use it when the customer cannot wait. If the payment turns out to have been taken, see Money taken, no sale.
- **If the connection drops** while the code is open, the window says "The till is offline. The payment will be checked when the connection is back." The countdown goes on, and the till cannot ask PayPal until the connection returns. The X still cancels, and the till reports it when the connection is back.
- **After a restart** the till reopens the window for a payment that was open, but the code cannot be drawn again: "This code cannot be shown again after a restart. Create a new one." Click **New QR code**. A customer who had already scanned the old code is still picked up. A code that cannot be created at all because the till is offline says "PayPal needs the connection: offline, take another payment method."

When the code does not lead to a payment

- **This code has expired. Create a new one.** The expired code is no longer shown, so nobody can scan it, and a late approval charges nothing. Click **New QR code**, or leave with the X.
- **PayPal refused this payment: take another payment method.** Nothing was taken. Close the window with the X and choose another method.
- **PayPal is holding this payment: take another payment method.** PayPal took the payment but has not settled it. The till does not wait, and this is not a sale. The window stays open with this message until you close it with the X (**Close**); the PayPal line goes. If PayPal later completes the payment, the money has arrived without a sale: see Money taken, no sale.
- **PayPal did not answer. Try again.** If it keeps failing, close the window with the X and take another payment method.
- **PayPal took this payment, but it cannot be used on this sale: it will be refunded through PayPal. Take another payment method.** PayPal took the money, but the till could not use the payment for this sale. This is not a sale: the window stays open with this message until you close it with the X (**Close**); the PayPal line goes. Take another payment method, or abandon the sale. The money has arrived without a sale and an administrator refunds it: see Money taken, no sale.

Cancel the sale after the money was taken

After **Payment received**, **Abandon transaction** cancels the sale. The basket is cleared and the abandoned sale is recorded, but the customer's PayPal payment stays taken: the till does not refund it. It reports the payment to the server (at once, or as soon as the connection is back), and an exception stays open until a person refunds the money (see below). If the till cannot set the payment aside, it says "The PayPal payment could not be set aside: the sale stays as it is, try again", and nothing changes.

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Money taken, no sale

The sale is made when the money is taken. In a few cases the money is taken and no sale follows:

- the sale was cancelled after **Payment received**;
- **Customer pays another way** was chosen just as PayPal was taking the payment;
- PayPal held a payment, then completed it;
- PayPal took a payment that the till could not use for the sale;
- a PayPal payment taken at the till that no signed sale picked up within 24 hours (for example a register that was reset before it came back online).

Each one is an exception for an administrator, with its amount, register, session and time: **PayPal capture anomaly**, in Fiscal → Closures (Exceptions). It stays open until the money is refunded: ShopForge never refunds it by itself. This version has no refund button for these exceptions. An administrator refunds the customer through PayPal, in the shop's PayPal account, then acknowledges the exception with a note.

Training mode

In training mode, **PayPal** is offered like any other payment method when the shop offers it at the till, and the QR window looks the same, with **Training Mode, Do Not Scan** in red. A big red cross over a pale veil covers the code, and the window says "Training mode: dummy QR code, do not scan" to screen readers. The code is not a PayPal link: it holds a short text, "PayPal POS Training / Nothing to do here" (in French when the till is in French). A phone that scans it may show the text or do nothing. Nothing is paid, and nothing is sent to PayPal or recorded by scanning it.

Simulate payment plays a successful payment; **Simulate pending** plays a payment PayPal holds (the code goes and the window says so). The X is named **Close** and just closes the window, with the PayPal line leaving the sale. The training sale is signed as a training sale, with a training reference.

Refunds and store credit

Refunds are issued from a past receipt and **require an open register**.

1. Open the **Receipts** tab, find the original receipt, and open it.
2. In the refund area choose the **Refund mode** — **Refund** (money back) or **Store credit** (avoir) — for a full or a partial refund. The choice is only shown when the shop's refund mode offers both (Configure → System → Refund modes); otherwise the only method offered is used: store credit ("Cash refunds are disabled — only credit notes (avoirs) can be issued.") or refund. A sale made at an **Outside Walls** location may be refundable even when the shop offers only store credit: see Sales made off premises below.

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3. Choose **Qty to refund** (partial) or refund every item still refundable, and choose a **reason** (defective, wrong item, changed mind, price error, duplicate charge, goodwill, other). The reason is required; a note is optional.
4. If the refund is above the refund threshold (50 € by default) or the sale is outside the return window, a **staff member approves** it, you included (see below).
5. The refund/avoir is signed, with its reason and approval, and appears in the JET Journal. The returned items go back in stock, whether you refund the money or give store credit; a store credit for the whole total, with no item chosen, puts nothing back. A refund made in training mode moves no stock. A refunded donation lowers the donation row of the X and Z reports and the payment method, never a VAT row.

Refunding a sale of a membership. A sale of a membership is refunded, never cancelled, and only at the customer's request. Refunding the membership line takes the membership back, whatever the amount. Before you confirm, the receipt shows a **Membership taken back** box: the price paid and the member discounts the customer has already obtained with this membership (online and at the till). For a sale in a shop, or an off-premises sale past its period, you choose the **amount refunded**, from 0 up to the price paid minus those discounts; it starts at that net. 0.00 € takes the membership back with nothing paid out. Within an off-premises sale's period, the full price is refunded, with no field. The register works the discounts out from its own copy of the data, so this works offline. A refund of other lines of the same sale leaves the membership in place and deducts nothing. See Memberships.

A sale already fully returned, or cancelled, cannot be refunded; the receipt says so. A store credit (avoir) needs the **customer receiving the credit note**. The refund mode preselected is the shop's default from Configure → System → Refund modes. If the shop's settings changed while the receipt was open, the register refuses a refund type that is now turned off: "This refund type is turned off in the POS refund modes".

Refund a sale paid with PayPal

For a sale paid entirely with PayPal, the receipt offers the usual **Refund as** choice (when the shop's refund modes offer both), with **Store credit** (avoir) selected by default. Choose **Refund** to give the money back to the customer's PayPal account. If the shop's refund modes allow only store credit, no PayPal refund is offered.

1. Open the receipt, choose **Refund**, the items, the **reason** and, when the amount needs it, an approval, as in the steps above. This needs the connection and an open register.
2. Click **Issue refund**. The till asks PayPal, and signs the refund once PayPal confirms it. The customer gets back the full amount refunded; PayPal's fee on the original payment is the shop's, not the customer's.
3. **PayPal refund pending: the money is committed at PayPal** means PayPal has accepted the refund and will complete it. The refund is signed.

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If the refund does not go through, the receipt says why:

- **PayPal refund needs the connection: refund by avoir** — the till is offline. The choice goes back to **Store credit**.
- **PayPal refused this refund: refund by avoir instead.**
- **No open cash session on this register: open one to refund at PayPal**, **This payment is not linked to a signed sale: refund by avoir**, or **The refund is more than what remains captured at PayPal.**
- **PayPal did not confirm this refund: try again. Do not refund by avoir: it may already be at PayPal.** The money may already be on its way back, so the till signs nothing yet and blocks this receipt: it shows "PayPal has not confirmed this refund yet" with **Ask PayPal again**. Until PayPal answers there is no avoir and no other refund of this receipt; other receipts and sales are not affected. The block lasts across closing the receipt and restarting the till. It ends when PayPal confirms (the refund is signed) or refuses (the avoir is offered again), or when a staff member releases it (below). Offline, it says "The PayPal refund of this receipt waits for the connection: ask PayPal again when online". If the till cannot read the state of the refund: "call the owner before refunding it".

Check with PayPal. On a blocked receipt, **Check with PayPal** asks PayPal what became of the held refund. If PayPal made it (done or pending), the refund is signed. If PayPal cannot be reached: "PayPal could not be reached: try again." If PayPal is already being asked: "PayPal is already checking this refund: try again in a moment." If PayPal confirms that nothing was refunded, the receipt says so ("PayPal confirms that nothing was refunded. Any staff member can release this refund: avoir and other refunds of this receipt are offered again.") and shows **Release this refund**. A **staff member** approves it, you included (the approval is signed with the reason "Release the held PayPal refund: nothing was refunded at PayPal"), and the receipt says "Refund released: nothing was refunded at PayPal." Both buttons need the connection.

The till sends a refund to PayPal only for a sale paid entirely with PayPal, not for a sale split between PayPal and another method, and never in training mode (the refund is then local and nothing is sent to PayPal).

Refund an online order's receipt

A customer who brings back in the shop something bought on the shop's site is refunded at the till, from the order's online receipt. A Discogs sale is refunded from its order, never at a till.

1. Open the receipt: in **Receipts** (register **Online · web**), or from the order's **History** with **View receipt**. As for any refund, the register must be open.
2. Under **Refund by**, choose **Cash**, **Store credit**, or **PayPal** when the order was paid with PayPal. Then choose the items and the **reason** and, when the amount needs it, get a manager's approval, as in the steps above.

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3. Click **Issue refund**. The refund is signed on this till, naming the online sale, and the order counts it in its refunds once the till has synced.

Gift cards and memberships bought online are not refunded at the till: "Gift cards and memberships bought online are refunded from the order, online."

Connected. Before it signs, the till checks the refund with the server, which holds the order's refunds, so a refund made online meanwhile is counted. If the order has changed (its items refunded online, its receipt replaced after a VAT correction, its payment disputed), the receipt says "This order changed meanwhile: reopen its receipt." and nothing is signed. While the till's refund is being completed, any other refund of the order waits: "A refund of this order is being completed. Try again in a few minutes."

Offline. Cash and **Store credit** work offline: the till checks the refund against its own copy of the online sale and of the order's refunds. A refund made online that the till has not synced yet is not counted. If the till's refund then takes the order beyond what it was paid, both stay recorded and the server raises an exception, "Online order refunded beyond its total", for an administrator to check whether the customer was paid back twice. **PayPal** is not offered offline: "Refunding to the original payment needs a connection to the server."

PayPal. The server refunds at PayPal, then the till signs. PayPal pays back at most what it took: "PayPal can't pay back this much: refund it in cash or as store credit." If the answer is lost, the receipt keeps the refund ("PayPal has not confirmed this refund yet…") with **Ask PayPal again**: ask again, and do not refund another way meanwhile.

A refund started and not signed. If the till stopped after the server accepted a cash or store-credit refund and before it was signed, reopening the receipt shows "A refund of this receipt was started and not signed. Finish it if the customer is here, or cancel it." **Finish the refund** signs that same refund; **Cancel the refund** gives it back, and the refund is offered again. Cancelling needs the connection: "Cancelling needs a connection to the server."

Sales made off premises

When the shop has turned on **Sales made off premises** (Configure → System → Cash drawer), a sale recorded at an **Outside Walls** location can be refunded to the means of payment it was paid with, for the number of days set there (14 by default), counted from the moment the sale was recorded. During that period:

- the refund is offered even when the shop offers only store credit; store credit is still offered beside it when the shop allows it, but the refund is preselected;
- being outside the return window needs no approval; a refund above the amount threshold still does;
- the receipt's refund area says so, with the last day: "This sale was made off premises: it can be refunded to its means of payment until {date}."

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A sale at a **Pro Client** location or in a shop is never covered, and after the last day the shop's own rules apply again. The place of sale is the one the receipt recorded, so renaming or deactivating the location later changes nothing.

Cancel a receipt or correct its payment

While the **cash session the sale was made in is still open** on this register, its receipt offers two more actions. Once that session is closed, only a refund is possible.

- **Cancel receipt** reverses the whole sale: every line, its stock, and its payment, the way it was taken. Choose a **reason** (and optionally a note); **any staff member always approves**, the seller included. Cash comes out of the drawer's expected amount — no cash movement to record. A card payment is not reversed automatically: the receipt tells you to **refund it on the card terminal**. Store credit the sale used goes back to the customer. A sale already refunded, or the sale that paid an online pickup order, cannot be cancelled (refund it, or the order, instead). A sale of a membership is never cancelled: **Cancel receipt** is not offered, and the receipt says "A sale of a membership is refunded, not cancelled." Refund it instead.
- **Correct payment** fixes how the sale was paid — for example cash keyed as card. Enter the payments as they really were (they must add up to the sale's total; store credit used stays as it was) and what happened; a **manager always approves**. The original receipt is not changed: the correction is a separate signed record, and the drawer's expected cash and the Z report use the corrected payments.

Both are signed in the JET Journal (`TX_CANCELLATION`, `TX_ADJUSTMENT`).

Manager approval

Some actions need an approval: cancelling a receipt (always), a refund above the threshold or outside the return window (except a sale made off premises, inside its guarantee — see Sales made off premises), a manual discount above the discount threshold (20 % by default), correcting a receipt's payment (always), opening a register on a proposed business date, extending the offline limit, and changing locked fiscal settings. For a **refund, a cancellation and a manual discount**, **any staff member approves, the seller included**, with their own PIN or password; the other actions still need a manager (admin user).

The approval window (titled **Approval**) asks **Approved by**, that person's **6-digit PIN** or **password**, and a **reason**. For a refund, a cancellation or a manual discount it lists every staff member; for the other actions, the managers. The PIN also works offline; the password is checked by the server and needs a connection. Each approval is signed in the JET Journal and recorded on the approved record. After three wrong attempts, that person's approvals are locked for five minutes. Three wrong entries on the lock screen count too, and the same block holds approvals for the same five minutes (see Wrong attempts).

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Every member of staff sets their PIN from the user menu → **My PIN** (it needs a connection; the registers get it at their next sync). Only a manager's PIN approves, except for a refund, a cancellation or a manual discount: an employee's PIN otherwise only unlocks the locked screen (see My PIN). A manager cannot approve their own action unless the shop allows it (Configure → System); a shop with a single manager allows it until the setting is changed. A seller approving their own refund, cancellation or manual discount is always allowed, whatever that setting says.

Working offline

When the server cannot be reached for a minute, the register goes offline: **Offline for 1 h 12** shows in the register header, on the opening screen and in the sync indicator. Everything keeps working, and every record signed offline is marked as such (receipts show **Issued offline**).

Offline time is limited by the **maximum offline duration** set by an administrator (72 hours by default):

- From half the limit, a banner says when it will be reached.
- At the limit, new **sales** are blocked until the connection returns (unless the shop chose **Warn only**). Refunds, cash movements and closing the cash session stay possible.
- A manager can **extend by 24 h** once, with a reason (manager approval). After that, sales are blocked again until the connection returns.
- In France the shop cannot choose **Warn only**: sales stop at the limit.

The limit counts from the **last time the register reached the server**, not from the moment it noticed: a register switched off on Friday evening and started again on Saturday with no connection has already used those hours.

Closing the day offline. Each day can be closed offline, so a weekend without a connection does not stop sales on Monday morning. In **End of day**, once the cash session is closed, the screen says « Offline: the day can be closed now. The server checks it when the connection is back. » The Z report is signed on the register, and the server checks it when the connection returns. The day cannot be closed while a record was refused by the server or could not be sent: the screen says « The day can't be closed: a record was refused by the server or couldn't be sent. Check the sync indicator. » Records still waiting to be sent do not stop it.

Opening a cash session offline. Offline, the register cannot ask the server for the date. It estimates it from the last answer. Past the offline limit, a date later than the register's last business date asks for a manager: « This device's date ({date}) is later than this register's last business date, and the server can't be reached to check it. Check the clock, or have a manager confirm the date. »

When the connection returns, the register sends everything it recorded and asks the server to confirm it received all of it. If the device clock goes back in time, or differs from the server's by more than 5 minutes, a clock anomaly is recorded in the journal.

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Records signed with a signing key an administrator has revoked wait for an administrator: the sync indicator says "{count} record waiting for an administrator: signing key {key} was revoked. Sign in as an administrator, then in Configure → Fiscal → Registers → Keys choose Accept held records, then Drain now." Its **Open Registers** link opens that tab. See Signing keys.

Receipts

The receipt list filters by **type** (Sales, Refunds, Cancellations, Adjustments, Avoir), **register** (**All registers** by default) and **training only**, with a **refresh** button. The **register** choice lists each till seen, then **Online · web** and **Online · Discogs**, the shop's online receipts; **Clear filters** clears the register and the type together. Each row shows the receipt number, the **Channel** (the till's short code, or a badge for an online receipt), type, item count, total, payment method, date and signature. Training-mode receipts are tagged so auditors can recognise them. A receipt whose customer has no e-mail address on file carries the tag **No e-mail address**: the receipt could not be sent to them automatically. Open it and type an address in **Send via email**; the same words show above the field.

Opening a receipt shows the full breakdown — items with unit HT/TTC, VAT per rate, discounts, payment details, the **Location** it was sold at — and the **signature block** (**Signature** and **Previous signature**), which is what makes the record tamper-evident. A second-hand line is marked "margin" next to its rate, and its VAT is listed on its own row, "Margin VAT {rate}%", apart from the normal VAT rows. A donation line reads "Outside the scope of VAT" where its rate would be, with no VAT, and a row "Donation, outside the scope of VAT" sits under the VAT rows; the receipt PDF prints it as « Don, hors champ de la TVA : {amount} » under the VAT lines, before the total paid, with « Ce ticket n'est pas un reçu fiscal. » under it, once: the shop gives no tax receipt for a donation. The receipt on screen shows the same sentence, "This receipt is not a tax receipt."; a refund or an avoir of a donation shows neither. A line of a new electrical or electronic product shows its eco-participation, the amount for the line's units: the till's basket shows "incl. eco-participation {amount}" under the line, and the receipt's PDF prints « dont éco-participation {amount} » (the French, as the donation line above). The receipt on screen has no line of its own for it. It is inside the line's total, so the VAT rows do not change, and a discount never reduces it. A refund of units gives back the eco-participation of those units with them. **Send via email** at the top sends (or resends) the receipt to any address you type in. **Save as PDF** and **Print** are beside it and work offline: the receipt is drawn from its signed record, the same way as the PDF the e-mail carries. **Print** opens the system print dialog with the receipt on an A4 page; choose any printer there. The receipt is counted as issued only once the print dialog has accepted the job, so a cancelled print records nothing. Doing any of the three again for a receipt already issued asks for a **reason** first (customer request, lost, printer failure, for the accountant, audit, or other); the detail shows how many times it has been issued.

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REÇU

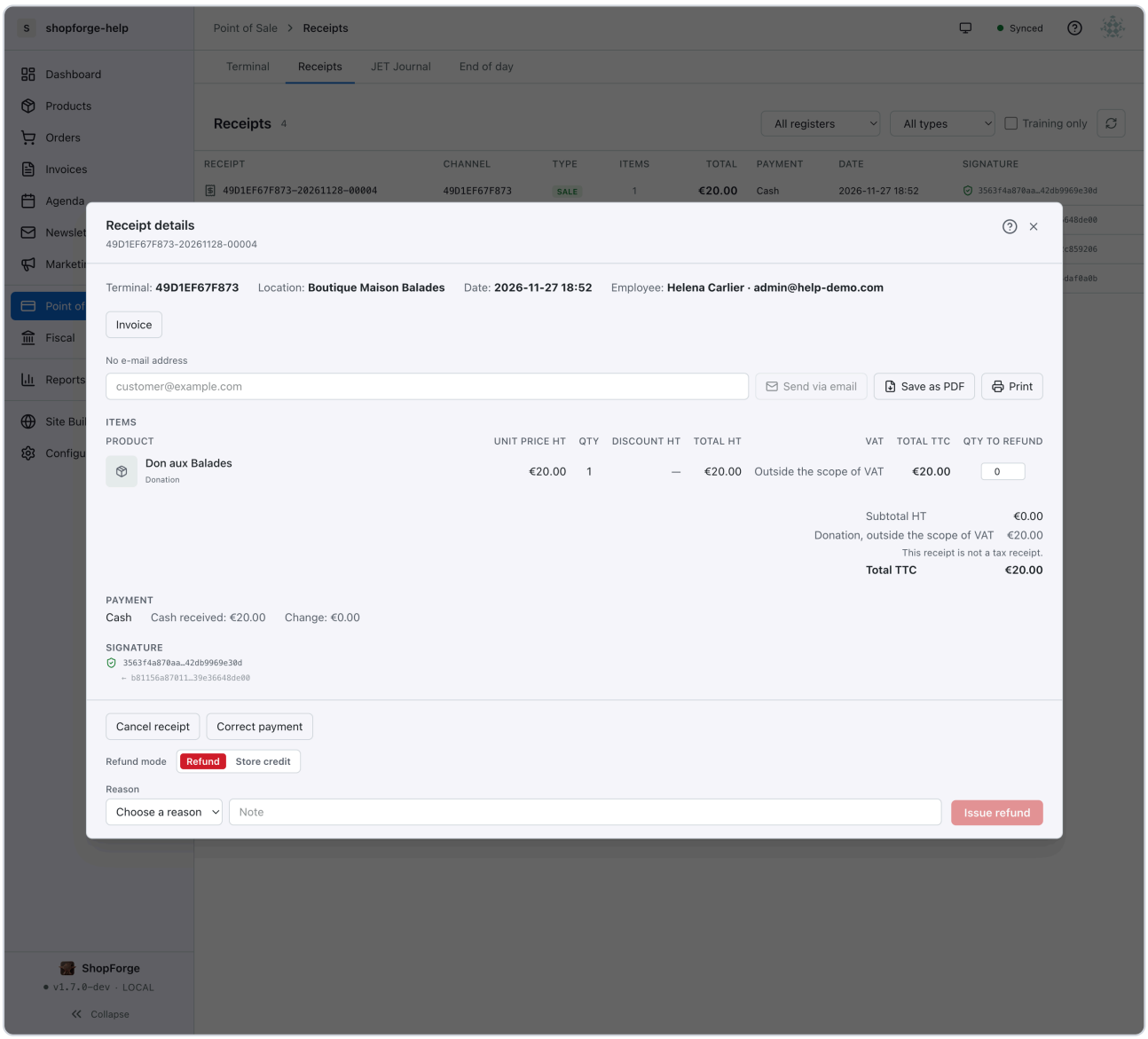
Maison Balades
12 rue du Disque 75011 Paris
Caisse 7D229D3FDC02 — Helena Carlier
Emplacement : Boutique Maison Balades

Reçu n° 7D229D3FDC02-20261128-00002
27/11/2026 22:15

1 × Turntable with preamp — New — 120,00 € (TVA 20 %)
dont éco-participation 1,50 €

TVA 20 % : 20,00 €
Total HT : 100,00 €
Total TTC : 120,00 €
Espèces : 120,00 €

Logiciel : ShopForge Backoffice POS — version fiscale 1.1.7.0
Attestation individuelle de l'éditeur : non encore publiée
Caisse : 7D229D3FDC02 (7D229D3FDC02)
Maison Balades — SIRET 73282932000074 — TVA FR40303265045
Signature : 04bb674298ef4a93… · Clé : 7d229d3f-dc02-5877-b2ab-f7a46092d4c7-00MWZIVN10D83E8745C152



Issuing again is issuing a duplicata. The first issue of a receipt, whether sent, printed or saved, is its original (reference T1); every later issue is a **duplicata** (T2, T3, ...) of that first one. It needs the reason above (and accepts a short note), and each issue is signed into the JET Journal as *Document issued* with its reference, its reason and its channel (e-mail, print or PDF), and, for a duplicata, the mention that it is one. An e-mail address is kept only as a hash. The evidence dossier counts the duplicatas. The e-mail carries the receipt as a signed PDF; for a duplicata the PDF, the subject (*DUPLICATA — Receipt ...*) and the first line of the message say so, and in training mode the subject starts with *FACTICE*. Whether the e-mail went out is recorded in the journal (*Document sent* or *Document sending failed*, with the reason as a code). In training mode the printed or saved receipt carries *FACTICE*.

If the receipt cannot be saved or printed, the screen says "The PDF could not be made. Nothing was recorded." or "The receipt could not be printed. Nothing was recorded.", and the next try is still the original.

Online receipts

The sales of the shop's site and of Discogs are in the same list, with the till's receipts: each paid online order has its signed receipt, and it shows here once the register has synced it, on its own **Channel** badge (**Online · web** or **Online · Discogs**). Choose one of these two in **register** to see only them; **Online · Discogs** shows none of the site's sales, and the other way round. A web order paid by a bank transfer, by card, by PayPal or with store credit is on the site's channel; its **Payment** column reads the way the till's does (**Marketplace** for a Discogs sale).

Open one to see its breakdown and its signature, as for a till's receipt. It names the register by its channel, and **Order** and its number, at the top, open the order. An online receipt is the record of a sale already made, so it has no **Send via email**, **Save as PDF** or **Print**: the buyer's order e-mail and invoice come from the order, not from this screen. A web receipt has the refund area, for a customer who brings items back to the shop (see Refund an online order's receipt); a Discogs receipt has none: refund it from its order (see Refunding an order). And the order's **History** has a **View receipt** link on the payment of a web or Discogs order, as it has on an in-store payment.

Every receipt names its place of sale: the receipt PDF says **Emplacement : {name}**, followed for a Pro Client or Outside Walls location by its type ("Emplacement : Fair stand — hors établissement"), receipts recorded before this was added included. At a shop the shop's address is the seller's address, as before; at a Pro Client or Outside Walls location, which has no address, the seller's address is the **default shop's**. The Z report and the monthly and annual closures name such a place of sale the same way, under the seller's address; the X report, the session summary and the Session history show the location's name with its type.

A receipt that was refunded, cancelled or had its payment corrected lists those **corrections**: each one's receipt number, amount (or payments before → after), reason, and the manager who approved it. Click a correction's number to open it, and **Back to the sale** to return.

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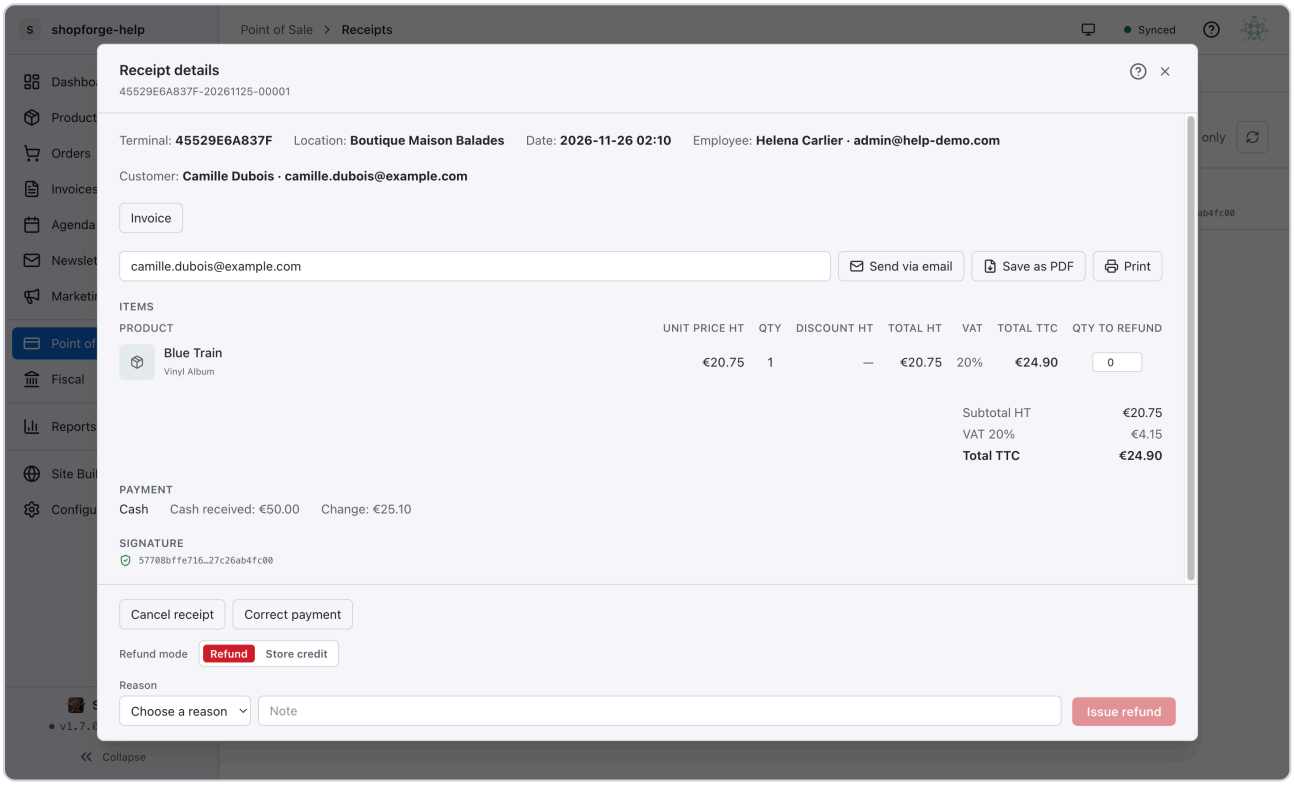
The invoice of a sale. Once a sale has an invoice, its receipt shows an **Invoice** panel with the invoice and its credit notes, each with its number, date, total and state, and **Open** and **Download**. The panel replaces the **Invoice** button and its form: a sale is invoiced once, so there is nothing left to create. Before the invoice exists, the receipt offers the **Invoice** button instead (see Invoice on request at the till). While the file is still being made, **Open** and **Download** are greyed and the state reads *Invoice PDF pending* (a credit note, *Credit note PDF pending*): the same wait as in Invoices. The panel reads the register's own copy, so it works offline; opening a file needs the server. There is no **Print** button for an invoice: a second copy would be a duplicata, and the register only makes those for receipts, as above. In the **Invoices** list, a till invoice's row opens the receipt of its sale, where its **Open** and **Download** are. An invoice and its credit notes leave a donation out: their total is the receipt's less the donation, a sale of donations only has no invoice, and the refund of one has no credit note.



If the shop has more than 200 receipts, the list shows "Showing {shown} of {total} receipts." — add filters to narrow it.

JET Journal

The **JET Journal** is the chronological, signed log of fiscal and technical events: operator sessions, cash sessions, sales, refunds, avoirs, abandoned transactions, discounts, drawer movements, daily closures, configuration and user changes, software start/stop/updates, key rotations, archives and exports. Events recorded by the back office itself (user accounts, register changes, exports made there) appear too, marked as recorded by the SYSTEM chain.

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- **Filter** by event type (grouped by category), register, operator, date range, sync status (pending, synced, failed) and verification result (valid, invalid, not verifiable here), or search the description.
- Each row shows the event number, time (a clock icon means the device clock differed from the business time by more than a minute), the event name (hover for the raw code), terminal, operator, a sync badge and a verification badge. Copy an entry's signature with the copy button.
- **Click a row** to open its details: full metadata, previous signature, signature, payload hash, signing key, related transaction or closure, and its position in the chain.
- **Export** the current selection as CSV or JSON. The export itself is recorded in the journal.

Z report

The **End of day** tab closes the fiscal day. It closes today, or first the oldest day without a Z report: there is no date to choose. When earlier days are owed, a line names them: "Days without a Z report: {days}. They are closed oldest first."

"Today" is the current **business date**, not the calendar date (it runs from 04:00 to 04:00 by default, see **Business day starts at** above). A Z report can't be dated after it, nor in a month before the month of the register's last Z report: such a day counts as closed, it never gets a Z report of its own, and a record that lands on it later is reported as late in the next Z report. If the register's clock is set wrong, closing the day may be refused with "A Z report can't be dated after today's business date." or "A Z report can't be dated in a month before the last one (2026-04-02).": correct the device clock.

The tab lists four numbered steps, each with its state on the right: **Done**, **To do**, **Waiting** or **After step 3**.

1. **Count and close the cash session** — "The cash session is closed.", or "A cash session is still open on this register." with **Go to the cash session** (it opens the **Terminal** tab, see Close register) and **X report (closes nothing)**.
2. **Records sent to the server** — "{count} records to send.", or "Waiting for a connection: {count} records to send." while offline ("{count} records refused or not sent: see the sync indicator." when a record was refused or could not be sent). Once they are sent it reads **Reconciled with the server at HH:MM**: the server confirmed it holds every record of this register ("Confirmed by the server up to {time}; newer records are confirmed when the day is closed." when records were added since). If it reports missing records, the register sends them again by itself: the line reads **Re-sending N missing records**, and if you try to close the day meanwhile, a message tells you to try again once they are reconciled. Nothing to do but wait; the step turns to **Done** by itself. If it still reads **N records missing on the server — contact support**, those records cannot be sent again from this register: contact support.

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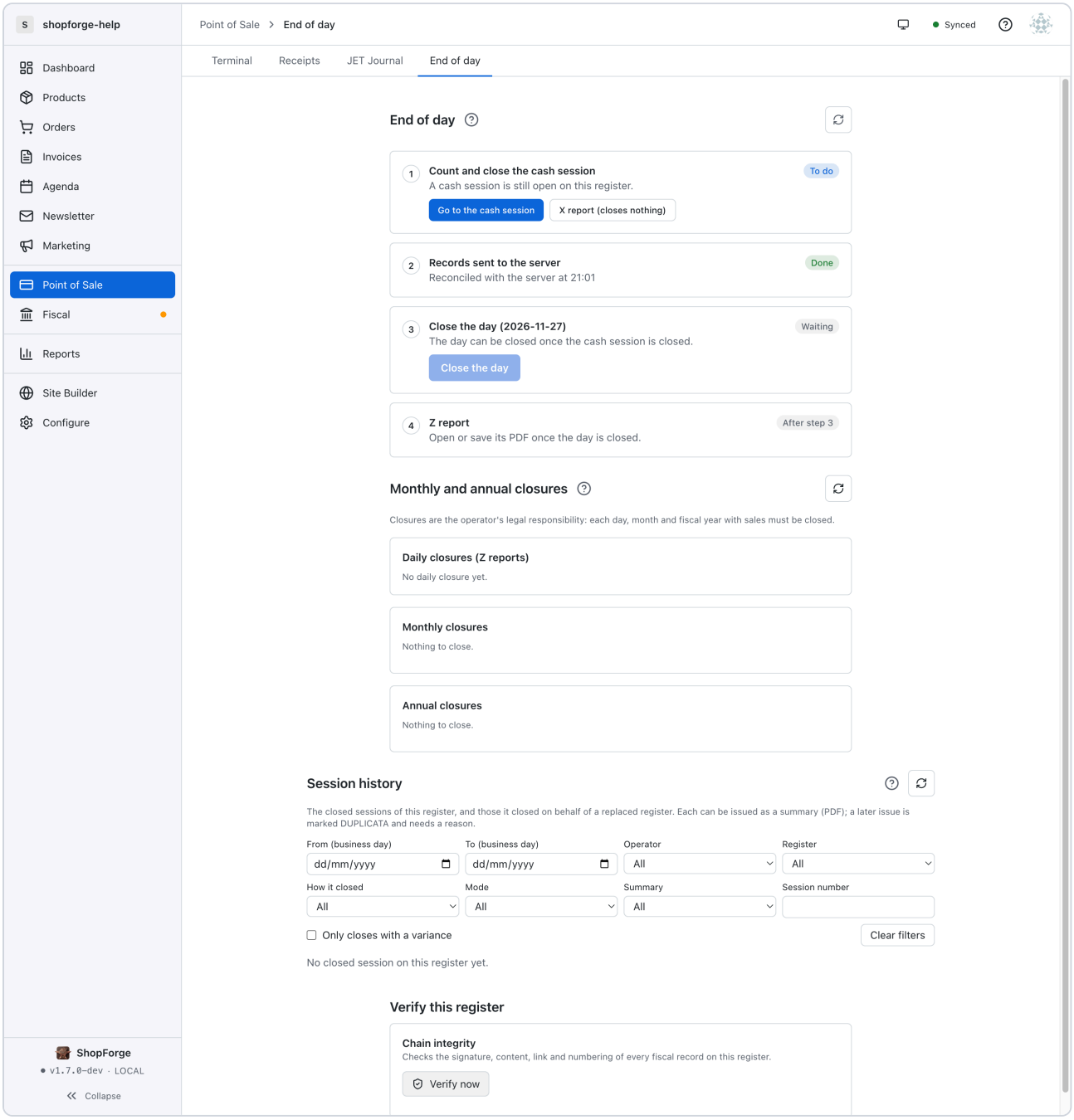
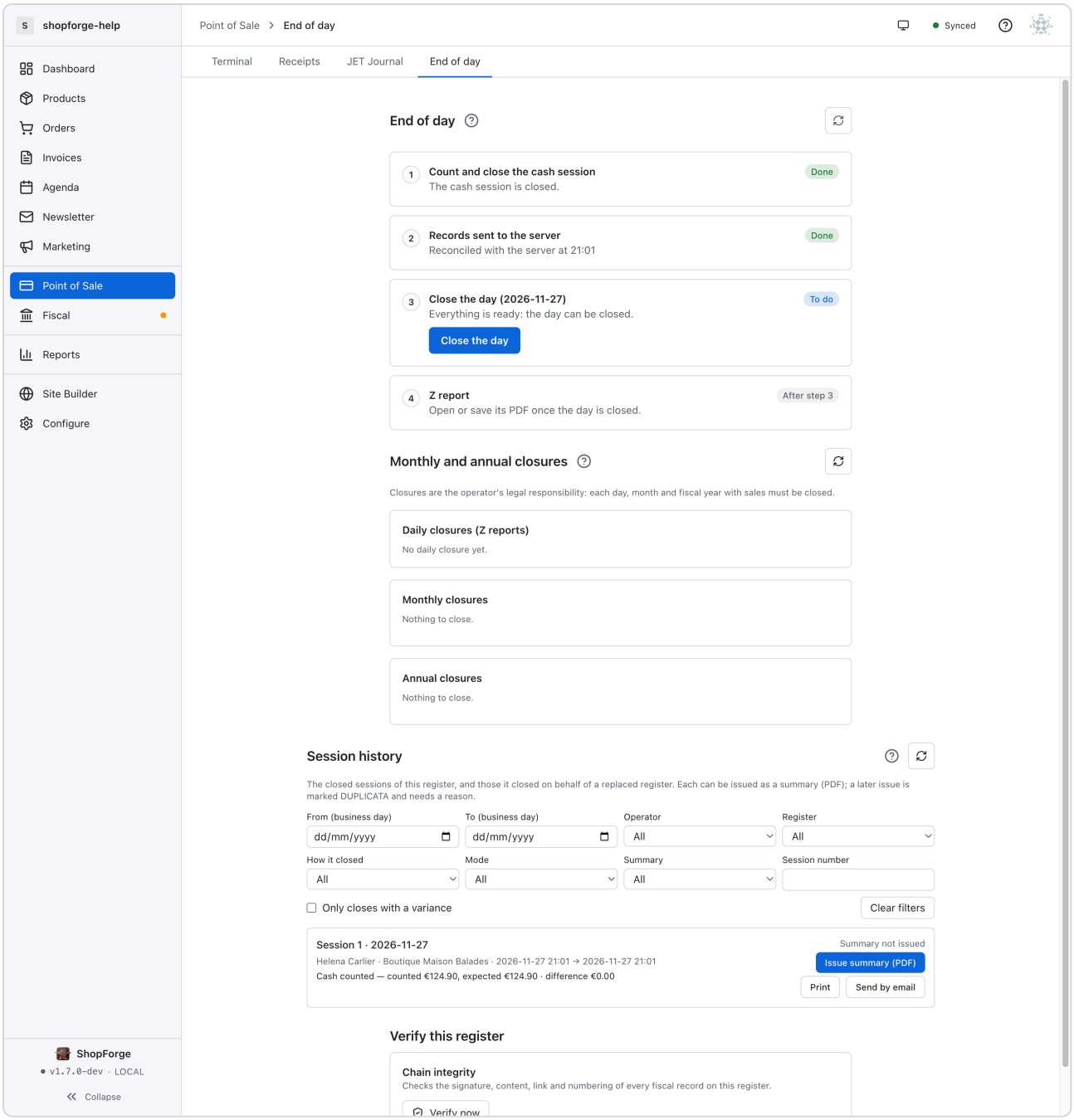
3. **Close the day ({date})** — one sentence says why it waits: "The day can be closed once the cash session is closed.", "Another register still has an open cash session. The day can be closed once it is closed.", "The day can be closed once the server has confirmed every record." or "Checking whether the other registers' cash sessions are closed...". When it reads "Everything is ready: the day can be closed.", click **Close the day**. Offline, it reads "Offline: the day can be closed now. The server checks it when the connection is back.", or "The day can't be closed: a record was refused by the server or couldn't be sent. Check the sync indicator." (see Working offline).
4. **Z report** — "Open or save its PDF once the day is closed." Once it is closed, the step says "Day closed. Its Z report is ready." and shows the **closure number**, **transactions**, **day total (TTC)** and **cumulative grand total (TTC)**, and a **Download Z report (PDF)** button.





When today already has its Z report, step 3 says "This day is closed." and its button is off, and step 4 says "Today's Z report is in the daily closures below.": the list of daily closures shows it as soon as it is made.

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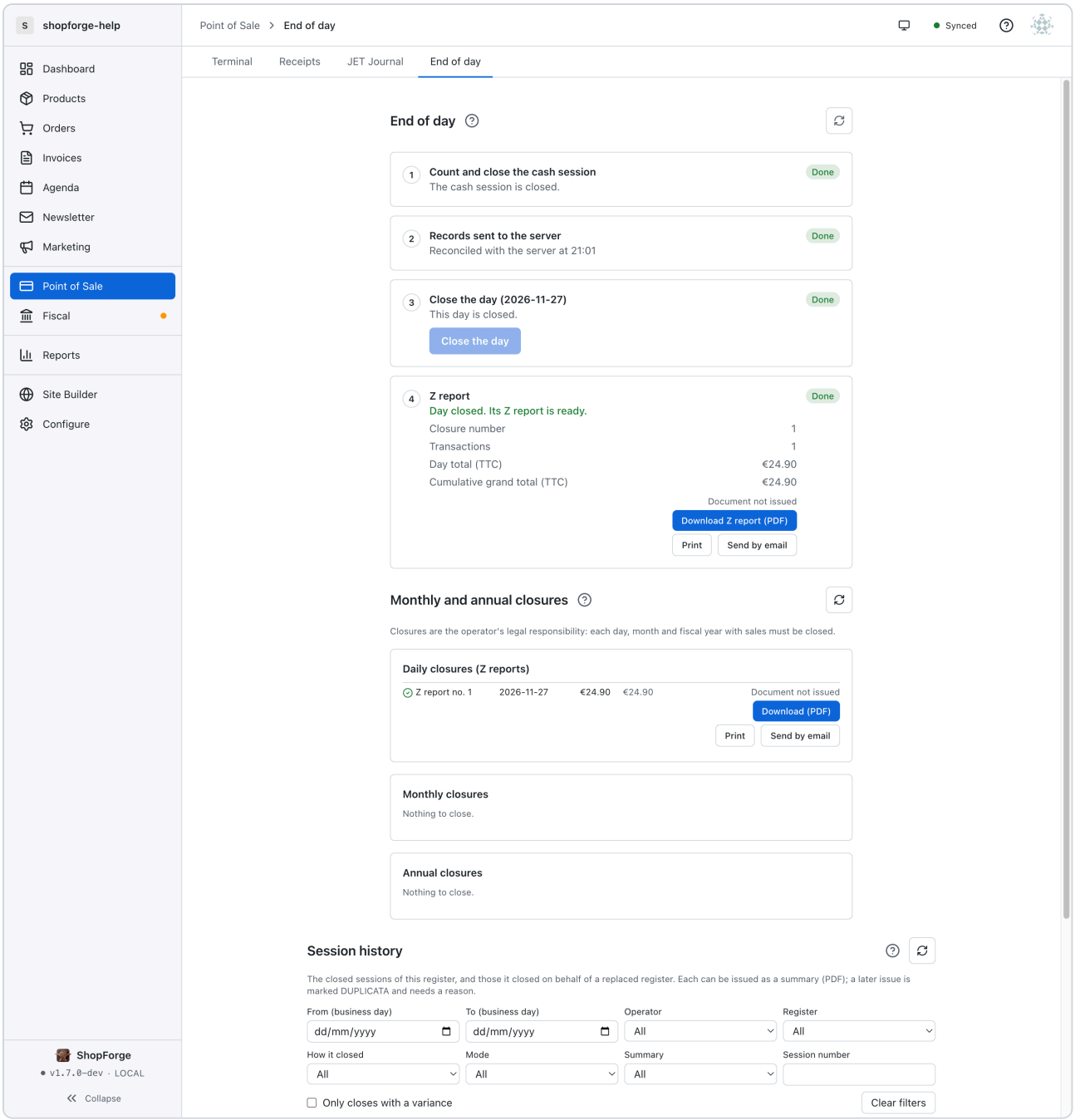

The Z report document. The PDF is the paper version of the closure. Its first part is exactly what was signed: the closure number, the register, the day and when it was closed, the **previous perpetual total**, the **period total**, the **new perpetual total**, VAT by rate, a row « Dons, hors champ de la TVA » and a row « Cartes cadeaux, TVA due à leur utilisation » (the donations' and the gift cards' number and amount, net of refunds: outside the VAT rows, inside the total with tax and the payments), payments by method, counts, cash movements, the integrity check, and the signature that ties the paper to the record. Its last part, labelled *informational*, gives the day's detail: each cash session with its float, expected cash, counted cash and difference; gross sales, refunds, cancellations, avoirs and discounts; abandoned sales. The first download is the original. Every later one is a **duplicata**: you are asked why, and the copy reads *DUPLICATA* with its own reference and the date of the original. Each issue is recorded in the journal.

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The **End of day** tab keeps a list of the **daily closures (Z reports)** and the monthly and annual closures, each with a *Download* button (then *Re-issue as duplicata*). A monthly or annual document also lists the closures it covers. For a replaced register, the closures this register signed for it are listed in its card and can be downloaded there too.

Online, the day can only be closed once the server has confirmed every record and **every** cash session is closed; offline, this register's own session is enough (see Working offline). Each business date can be closed only once, and a closed day cannot be sold in again: opening a register on a closed day proposes the next business date, which a manager approves. A register whose clock is behind its last business date asks a manager to pick a business date instead; one whose clock is far ahead of the server's is refused until the clock is corrected. Days are closed in order: a day's Z report is refused while an earlier day with sales still has none — the **End of day** tab lists those days under **Days without a Z report** ("End of day closes them in order, oldest first.").

Monthly and annual closures

The same tab lists, for this register, the **monthly closures** (one per calendar month) and **annual closures** (one per fiscal year, as set in the fiscal settings) still due, with what holds each back — a day without its Z report, a cash session still open, a month without its monthly closure, or the period not over yet (the server's clock decides). **Close the month** (or **Close the fiscal year**) is enabled once nothing holds it back and everything is synced. Closures are the operator's legal responsibility: the opening screen reminds you when one is overdue.

The register makes them by itself. You do not have to press the button. Once a month or a fiscal year has ended, the register makes its closure itself, the oldest one first and one at a time, as soon as it has sent everything it signed to the server and has been quiet for 5 minutes. It makes the same checks as the button and signs nothing while one holds the closure back; a month with no sales is not closed. A month ends with its last **business day** (the shop's day starts at the hour set in the fiscal settings, 4:00 by default), not at midnight.

Under each owed closure, the tab says in words what holds it back, with the months and dates in your date format:

- "Waiting for this register to sync.": something it signed is still to be sent. Let it sync; this line comes before any other.
- "A cash session of 10/2026 is still open on this register.": close that session.
- "12/09/2026: no Z report yet." (every day concerned): make those days' Z reports in order.
- "09/2026 isn't closed yet.": the month before is closed first.
- "The fiscal year containing 31/12/2025 isn't closed yet.": the fiscal year before is closed first.
- "10/2026 hasn't ended by the server's clock yet.": nothing to do, the register waits for the server's clock.
- "This register hasn't reached the server since it started.": let it reach the server.

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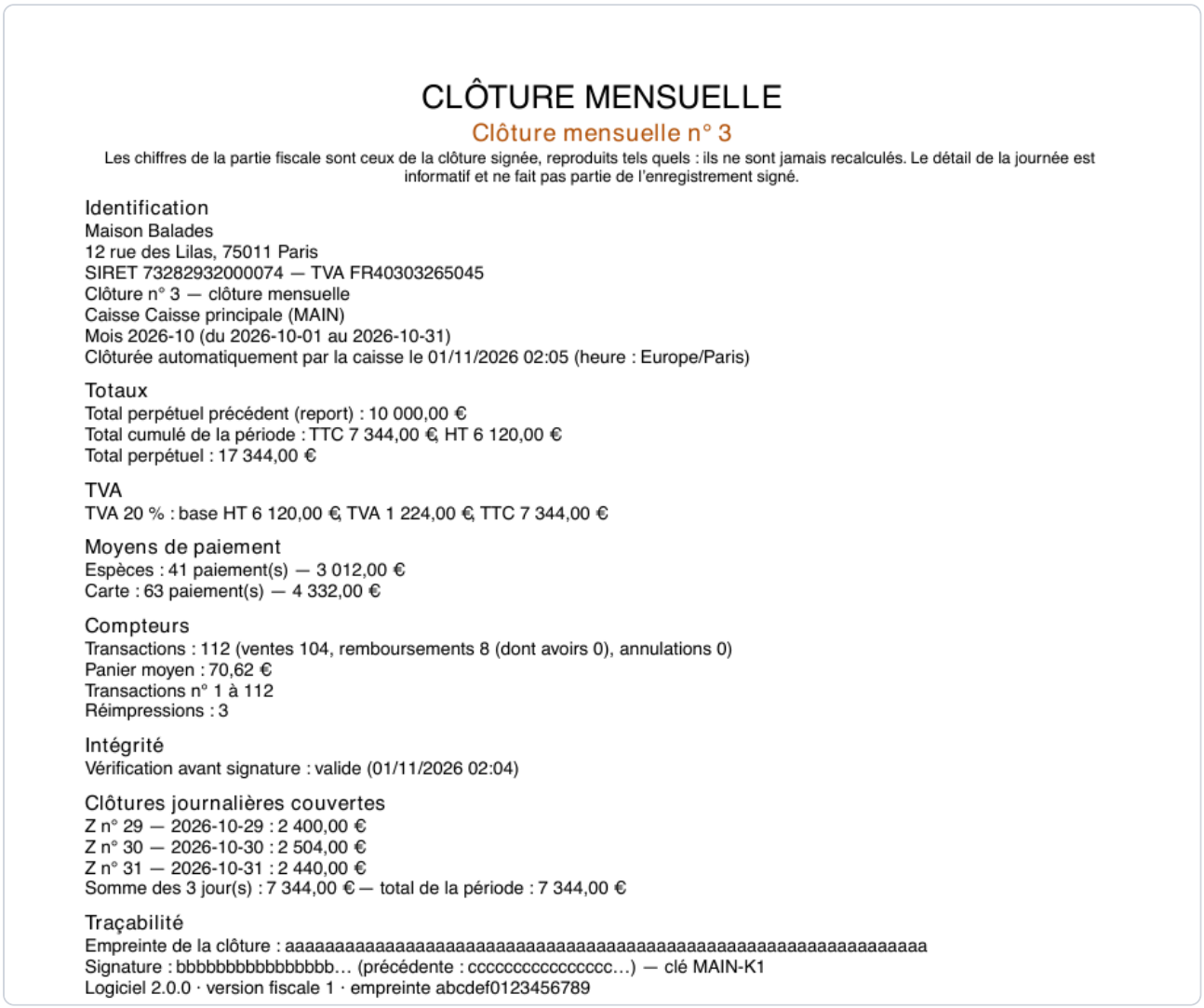
- "The totals don't follow on from the last closure: an administrator must check." and "10/2026 is in a fiscal year that is already closed: an administrator must check.": no closure is signed until an administrator has looked at the register's records.

The opening screen's reminder says the same: "Monthly closure for 10/2026: the register makes it by itself once it can." (or "Annual closure for ..."), followed by the reason while one holds it back. What stays yours is keeping the closure possible: make each day's Z report, close the cash sessions and let the register sync. The button is still there if you want to close at once. The closure's document says « Clôturée automatiquement par la caisse » ("Closed automatically by the register": the documents are in French) where a closure you made says who made it.



CLÔTURE MENSUELLE

Clôture mensuelle n° 3

Les chiffres de la partie fiscale sont ceux de la clôture signée, reproduits tels quels : ils ne sont jamais recalculés. Le détail de la journée est informatif et ne fait pas partie de l'enregistrement signé.

Identification
Maison Balades
12 rue des Lilas, 75011 Paris
SIRET 73282932000074 — TVA FR40303265045
Clôture n° 3 — clôture mensuelle
Caisse Caisse principale (MAIN)
Mois 2026-10 (du 2026-10-01 au 2026-10-31)
Clôturée automatiquement par la caisse le 01/11/2026 02:05 (heure : Europe/Paris)

Totaux
Total perpétuel précédent (report) : 10 000,00 €
Total cumulé de la période : TTC 7 344,00 €, HT 6 120,00 €
Total perpétuel : 17 344,00 €

TVA
TVA 20 % : base HT 6 120,00 €, TVA 1 224,00 €, TTC 7 344,00 €

Moyens de paiement
Espèces : 41 paiement(s) — 3 012,00 €
Carte : 63 paiement(s) — 4 332,00 €

Compteurs
Transactions : 112 (ventes 104, remboursements 8 (dont avoirs 0), annulations 0)
Panier moyen : 70,62 €
Transactions n° 1 à 112
Réimpressions : 3

Intégrité
Vérification avant signature : valide (01/11/2026 02:04)

Clôtures journalières couvertes
Z n° 29 — 2026-10-29 : 2 400,00 €
Z n° 30 — 2026-10-30 : 2 504,00 €
Z n° 31 — 2026-10-31 : 2 440,00 €
Somme des 3 jour(s) : 7 344,00 € — total de la période : 7 344,00 €

Traçabilité
Empreinte de la clôture : aaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaa
Signature : bbbbbbbbbbbbbbb… (précédente : ccccccccccccccc…) — clé MAIN-K1
Logiciel 2.0.0 · version fiscale 1 · empreinte abcdef0123456789

When this register may close for another one (it replaced it, it was chosen to close for it when it was retired, or it took that over from a register that was itself replaced or retired since), the tab also lists the closures that register still owes, which you can **close on its behalf**. A cash session of that register that is still open holds its monthly closure back until it is closed on its behalf; its sales are in the closure of its day like any other. When a register is replaced, its open sessions are closed on its behalf by the register that replaced it — **without a count**: no counted cash and no variance are recorded, and the drawer is counted again when the new register opens its first

session. Sessions left over from before (or that were not known at the time) are listed with a **Close its open cash sessions on its behalf** button.

Session history

Under the closures, the same tab lists the **sessions this register has closed**, newest first, fifteen to a page. It is read from the register itself, so it works offline. For each session you see its number and business day, the operator and the shop, when it opened and closed, **how it closed**, and the **daily closure (Z)** of that day when there is one:

- **Cash counted** — with the cash counted, the cash expected at the closing, the difference, and the reason given for it;
- **Cash handed to another till** — nothing was counted: the cash went to another register (see Close register);
- **Closed on behalf** — the session of a register that was replaced, closed by this register without a count. These sessions carry the short code of the register that held them (the replaced register's name is not known here), so you can tell them from your own.

A **Training** tag marks a training session. A **Not compared** tag marks a close the server recorded without comparing it with the register's expected cash, because the session started before the server indexed sessions' sales; no anomaly is raised for it.

Finding a session. The filters above the list narrow it: **From (business day)** and **To (business day)** (both days included), **Operator**, **Register** (this register, or a replaced register whose sessions this one closed on behalf), **How it closed** (*Counted*, *Cash handed to another till*, *Closed on behalf*), **Only closes with a variance**, **Mode** (*Real* or *Training*), **Summary** (*Issued* or *Never issued*) and **Session number**. Each filter applies as you change it and takes you back to the first page; **Clear filters** resets them all. *No session matches these filters* means the filters kept nothing, not that the register has no history. The filters are reset when you leave the tab.

The session summary. Each session can be issued as a PDF summary: its sales, payments and cash, and what the closing recorded. It says on its face that it is a control document, not a fiscal closure. The first time you issue it, it is the original. Every later time is a **duplicata**: you are asked why (a reason, and an optional note), and the copy reads *DUPLICATA* with its own reference and the date of the original. Each issue is recorded in the journal. If cash reached the register after a session was closed (a transfer that arrived late), the summary shows it on its own line, as cash that was not counted.

Verify this register

At the foot of **End of day**, **Verify this register** checks that the records of this register have not been altered. Click **Verify now**: the seven chains of this register are checked one after the other, offline too, and each result is shown as it arrives. A chain that cannot be checked is named and

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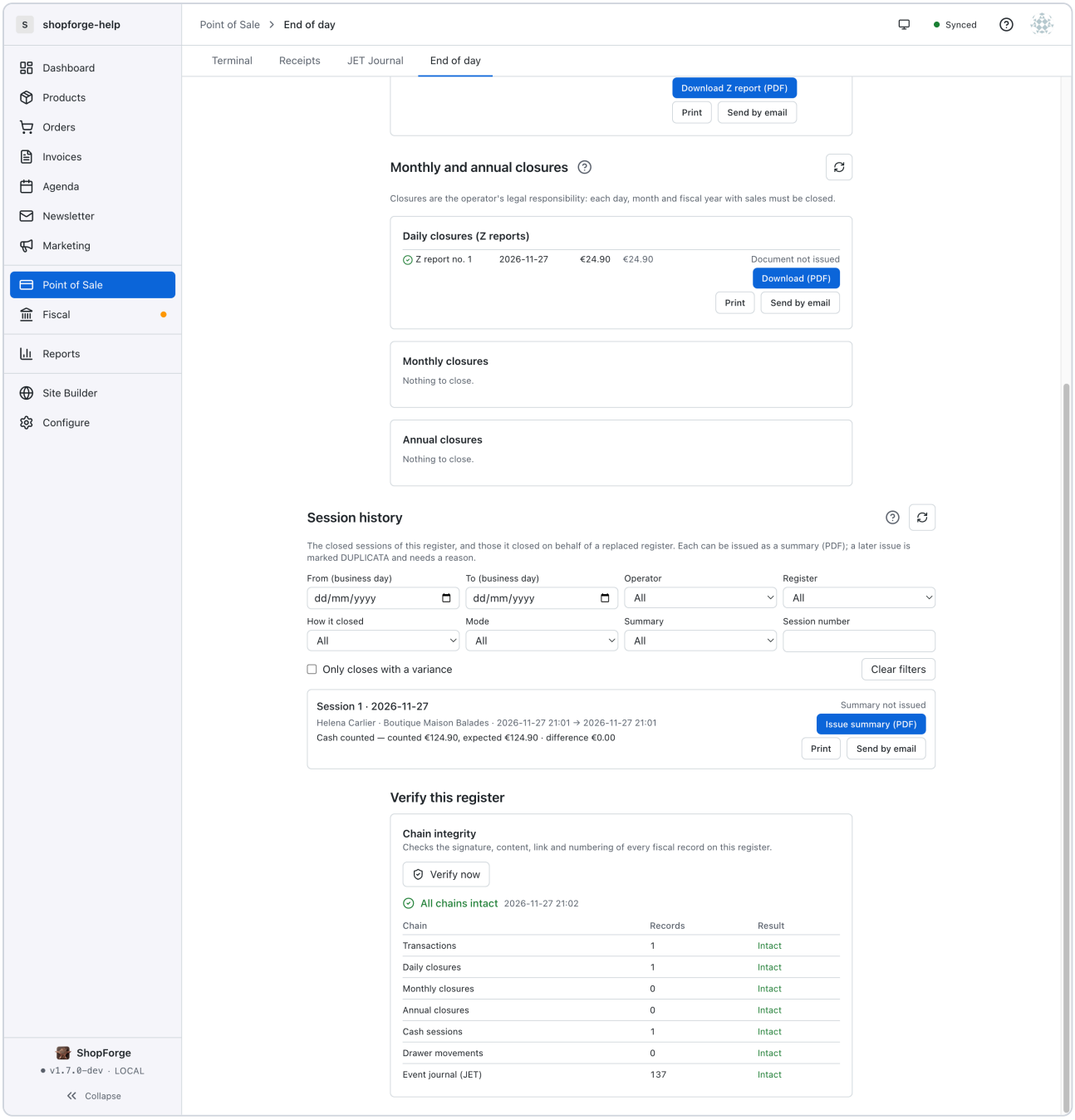
the others carry on; for a broken chain the screen shows the first record that fails. If a chain is reported broken, tell an administrator. Administrators have the same check in Fiscal → Closures.



Replace a register

An **administrator** replaces a register when its computer is changed, or when its fiscal records can no longer be trusted. The old register is frozen and archived; the new one starts a new history from zero, with its own signing key. Only an administrator sees the buttons below; anyone else sees "Only an administrator can do this."

There are three ways to reach it.

"This register's identity has changed" — shown instead of the till when the computer or its disk is not the one the register was set up on.

1. Sign in as an administrator on the new computer. Check first that it really is a replacement: a disk copied from a working register shows this same screen.
2. Click **Confirm replacement**. The screen warns what it does: register {old} is archived and closed, and register {new} starts a new history. It works offline.
3. The app archives the old local ledger, closes the old register's open sessions on its behalf, registers the new one and queues the replacement for the server. The new register can sell at once.
4. The sync indicator says "{count} waiting for an administrator (a new signing key or a register replacement)". Sign in as an administrator and click **Drain now**. Until the server has accepted it, the old register is still active there.

"Register this till" — on a new install, choose **New register**, or, under "Or replace an existing register", **Replaces {code}**. Replacing needs a connection ("Replacing a register needs a connection to the server.") and lists only the registers still active ("No other active register." when there is none). If the chosen register has been replaced meanwhile: "That register is no longer active on the server."

A blocked register. The screen's title names the cause: "A fiscal chain of this register is broken — contact an administrator", "This register was restored from an older copy — contact an administrator" or "The program files differ from the editor's — contact an administrator". **Replace this register** closes this register's identity and starts a new register that replaces it (a connection is needed); the current ledger stays, archived, as evidence. **Re-sync from server** first archives the current ledger as evidence, then rebuilds it from the server's copy. **Re-sync from server** is refused when this register holds signed sales the server never received: "This register holds signed sales the server never received, so it cannot be re-synced from the server. Use "Replace this register" so they are counted." Use **Replace this register**: the current ledger stays, archived, and those sales are counted. If that archive cannot be built, nothing is reset and the register stays blocked: "The register's records could not be archived, so nothing was reset. Try again, or contact support." When the cause is the software self-check (see Inspection) there is no such button: the register asks for a reinstall.

"Fiscal records can't be checked yet: waiting for their signing keys from the server." — shown after the register's local data was rebuilt from the server (the app's local data was deleted or reinstalled on this computer, or after **Re-sync from server**). Its earlier records were signed with keys this computer doesn't have yet, so they can't be checked, and selling waits. This is not a chain error: press no button, and don't use **Re-sync from server** or **Replace this register** (they are not offered). The register fetches the keys at its next synchronization; once the records check out, the till opens by itself. Offline, the screen adds "A connection to the server is needed.": connect the computer and wait. If a record turns out to be signed by a key the server doesn't know, the screen becomes the fiscal chain error above.

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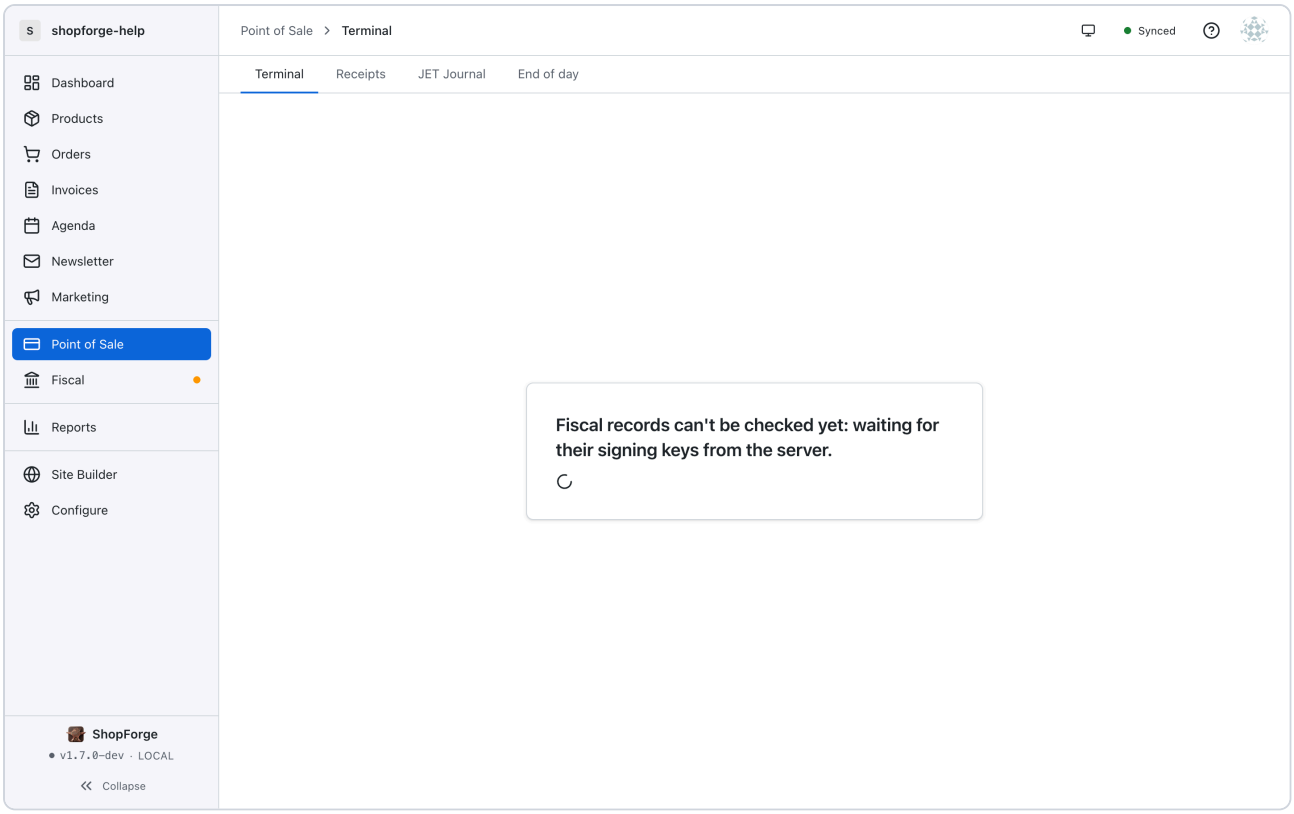

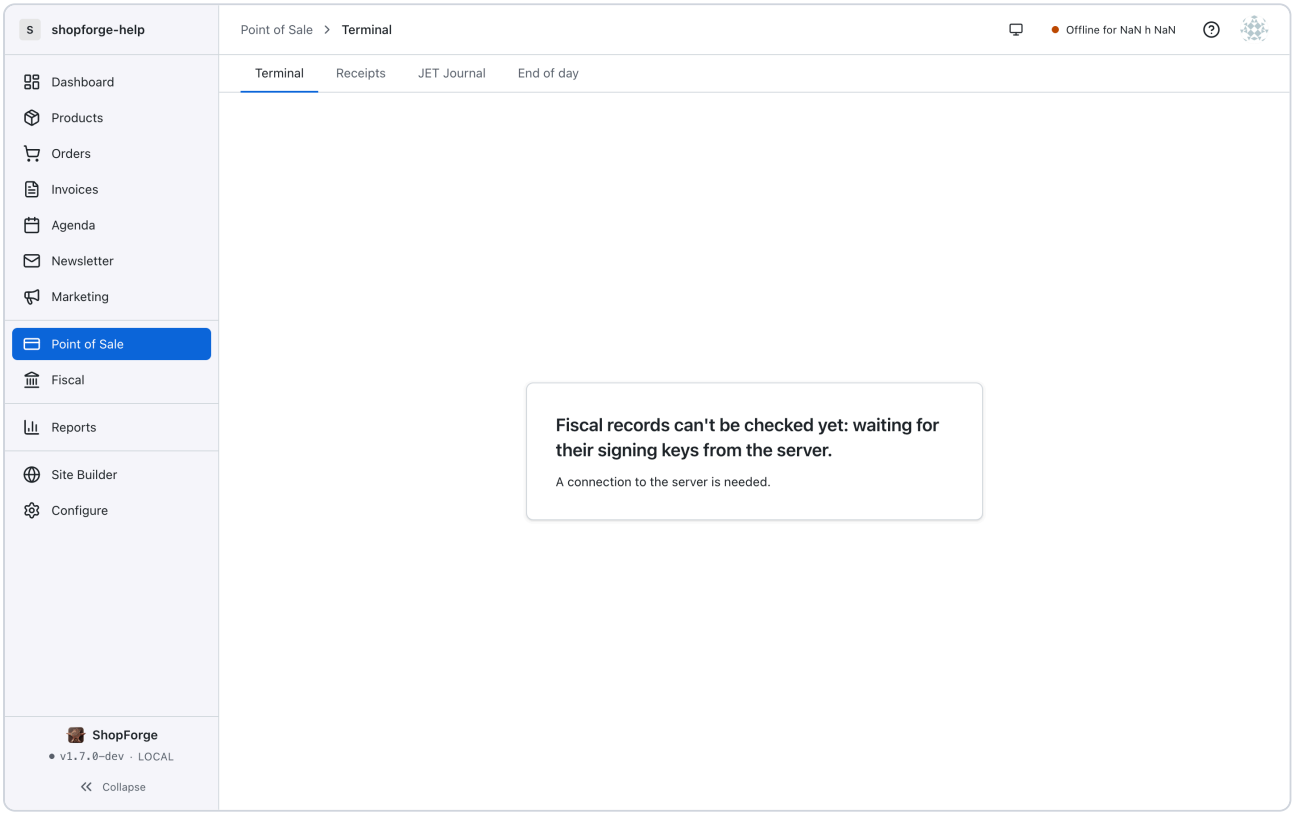

If another install on the same computer is using the register, the screen says so and nothing is replaced.

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A register is lost or out of service

A register is **out of service** when it can no longer sign: stolen or lost, destroyed, an unrecoverable failure, or a corrupted ledger. Another register then signs what it still owes, **on its behalf**; no key of a store register is ever on the server. These steps are for an **administrator**; the administrator's runbook has the detail. If the computer is only being changed, use Replace a register instead.

1. **After a failure or a corruption, restore first.** Restore the register from its backup (the runbook has the steps: *restore recovery*). If it works, it closes its own periods and you stop here.
2. **After a theft or a loss, revoke its signing key** (Keys → the active key → **Revoke**) and file a police report: it is your evidence for the accountant.
3. **Make sure another register is active and synced.** Sign in as an administrator on it and **Drain now**. A shop with one register enrols the replacement first: until then nothing is sold or closed, and Fiscal → Closures shows the periods as *pending*.
4. Open **Configure → Fiscal → Registers**, press **Retire** on the lost register's row, choose the register that closes under "Register that closes on its behalf", give a reason (the cause and the date) and confirm. **This cannot be undone.** The screen shows the frozen perpetual total: keep it.
5. On the register that closes, open the **End of day** tab. Press **Close its open cash sessions on its behalf** (no cash is counted for them), then, in "Closures due by the replaced register", **Close on its behalf** for each day, then each month, then the year. A period that is not over yet cannot be closed yet. A day's closure waits until every record of the lost register the server holds has reached this register: it shows *Some records of the replaced register haven't reached this register yet (missing: 2). Try again once they have.* Let the register sync, then press again. It also needs a connection to check: offline it shows *Server unreachable — the reconciliation needs a connection*.
6. In **Fiscal → Closures**, the lost register stays in the **Registers** list, labelled *retired*; in the **Periods** panel its state turns from *pending* to *closed*, and the periods can be produced.

Sales the lost register had not yet sent to the server are not in ShopForge, and nothing counts the cash that was in its drawer. Tell your accountant in writing: the cause and the dates, the frozen total (any difference with its last Z is sales to reconcile from the payment terminal and bank records), the sessions closed without a count, and the journal events. Each closure on behalf says in the journal that another register signed it.

Related

- Offline & synchronization
- Fiscal — admin: Overview, Closures, Inspection
- Fiscal settings — admin

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- Orders — collecting an online order's payment in store

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Promo codes

A promo code takes an amount or a percentage off an order, between two dates. A customer types it at the checkout of the online shop; a cashier types it at the till. This page is for employees: everyone can read the codes, and only an administrator can create, edit or end one ("Only an administrator can create, edit or end a promo code."). The steps that need an administrator are marked **(administrators)**.

What a promo code is

- A code is made of **uppercase letters, digits and dashes**, for example `SPRING-10`. Each code is unique in the shop. When someone types a code, surrounding spaces and capital letters do not matter.
- It takes off **a percentage** ("Percentage off") or **an amount** ("Amount off") of what it covers. An amount larger than what it covers takes off only that much: an order never goes below zero.
- It is valid between two dates, both required and both included. There is no code without an end date.
- It can be limited to some shops, to the online shop, to pickup or delivery, to some product categories or tags, and it can leave out sale items. All of this is in Where a code applies.
- An order takes **one** code. A second code is refused while the first stays.

The promo codes list

Open **Marketing**, then the **Promo Codes** tab. The list shows, for each code, its **Code**, its **Discount**, its validity (**Valid**) and what it applies to (**Applies to**). An unscoped code shows "All categories". A code limited to shops shows "3 locations" (for three shops); one limited by tag shows "2 tags" (for two tags). "Sale items excluded" is shown when the option is on, and "Online" or "Online only" when the code applies in the online shop.

Type in **Search a code** to find a code. The total ("12 codes", for example) sits above the list; click "Load more (20 of 45)", for example, for the next page. A new list says "No promo code yet.", and a search with no result says "No promo code matches this search." Click a row to open the code. The list works offline, from the copy kept on this computer.

Create a promo code

(Administrators.) Click **Add promo code**. The form says: "A code that takes an amount or a percentage off an order between two dates." The form has six sections: **Code**, **Discount**,

Validity, **Where it applies**, **Which products** and **Who can use it**. In the first three, fill in:

Field	What to enter
Code	Uppercase letters, digits and dashes. It cannot be changed afterwards.
Discount	**Percentage off** or **Amount off**.
Value	A **Percentage (%)**, or an **Amount**, following the type you chose; the field shows `%` after a percentage and the currency sign after an amount. "Enter a valid value for this discount type." appears if it is empty or wrong.
Valid from	The first day (and time) the code works.
Valid until	The last day (and time) the code works.

Both dates are inclusive, in the shop's timezone (the form shows it: "Both dates are inclusive, in the shop timezone"). Leave the time of **Valid until** empty to include the whole day. An empty time of **Valid from** means the start of the day. "Enter the start date and time." and "Enter the end date and time." appear when a date is missing.

Where it applies and **Which products** decide where and on what the code applies; see Where a code applies. In them, an empty field reads "All locations", "All categories" or "All tags": it means no restriction, and typing in the field still searches. **Who can use it** has two settings, described in Who can use a code. Click **Save**: "Promo code saved."

Edit or end a promo code

Click a row to open the code. An employee sees it read-only. An administrator can change everything except the code itself ("The code itself cannot be changed."). Beside the **Code**, a **Status** badge says where the code stands: **Scheduled** (it has not started), **Active** (between its two dates) or **Ended** (its **Valid until** date has passed, which is also the case right after **End code**). It is worked out from the dates saved with the code, when you open it: changing a date in the form changes it only once you click **Save**. An ended code can still be edited.

(Administrators.) To stop a code before its **Valid until** date, click **End code**. The dialog "End this promo code?" says "SPRING-10 will stop being accepted from now on." (with the code you opened) and the code is refused as expired from that moment. If the code has not started yet, it says "SPRING-10 has not started yet. It will never be accepted: both its dates are set to now." Ending a code that is already ended changes nothing. There is no delete: an ended code stays in the list.

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A sale already made keeps its discount: ending a code, or a refund, never restores or reactivates it.

Where a code applies

The **Where it applies** section starts with "Leave a field empty for no restriction."; the **Which products** section holds the product fields and **Exclude sale items**. Every field you fill in narrows the code, and a code applies only to an order that meets **all** of them.

- **Shop location**: the shops where the code works at the till. A code limited to shops is refused online unless **Online shop** is ticked.
- **Online shop**: tick it to make the code work in the online shop too. With a shop and **Online shop**, the code works at that shop and online. With **Online shop** and no shop, it works **online only**; the list says "Online only" and the till says "This code is valid online only."
- **Fulfilment method**: **Any**, **Pickup** or **Delivery**. At the till, the sale's own method is used. A delivery-only code is how you give a delivery discount: there is no free-shipping code.
- **Product category**: "A category includes its subcategories." Several categories: any one matches.
- **Product tag**: several tags: any one matches.
- **Exclude sale items**: "Products with an old price higher than the price do not get the discount." An old price equal to or lower than the price is not a sale, so the code still applies. Unticked, a code also applies to sale items, at their selling price.

Shop and fulfilment decide whether the code applies to the order at all. Category and tag decide **which lines** it discounts; a line must match both when both are set. A gift card, a membership or a donation is never discounted.

Who can use a code

The **Who can use it** section of the form has two settings. They are checked **online, for a signed-in customer**; the till does not apply them, because a sale may have no customer ("Checked online, for a signed-in customer. The till ignores these settings.").

- **Eligible orders**: a choice of **Any order** (the default) or **First order only**. With **First order only**, the code is for a customer who has no earlier order in the shop.
- **Limit to one use per customer**: ticked by default. A customer who already has an earlier order with this code cannot use it again. With **First order only** it is ticked and cannot be unticked; with **Any order** you can untick it to let customers use the code several times.

An earlier order **counts** unless it is **cancelled or never paid online**. A refunded order still counts, and so does an order paid at the till. An online order whose payment is still pending or has failed does not count, so a customer whose payment failed can try the code again.

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When a code is refused

A refused code changes nothing and the customer or cashier is told why. The reasons are the same online and at the till:

- the code is unknown (at the till, a code created a moment ago is unknown until the next synchronisation);
- it is not valid yet, or it has expired;
- it is not for this location, or it is valid online only;
- it does not apply to this kind of sale (pickup or delivery);
- nothing in the basket is eligible. The online shop says why: it holds only gift cards, memberships and donations ("A promo code does not apply to gift cards, memberships or donations."); the category or tag matches no other line; or the only matching lines are sale items the code excludes;
- a code is already applied;
- the code is for a first order only and the customer already has an earlier order: "This promo code is for a first order only.";
- the code is limited to one use per customer and the customer has already used it: "You have already used this promo code."

The last two are shown online, to a signed-in customer only; see Who can use a code.

A code that applies to only some of the basket is not refused: it stays applied, and each line it applies to shows the amount taken off under its total. Under the applied code the cart then says, one message at a time: "This promo code does not apply to items already on sale." when the code excludes sale items and the basket holds one, or else "This promo code does not apply to every item in your basket." when the code's category or tag leaves some line out. Gift cards, memberships and donations never trigger it. A sale item shows its old price struck through before its price.

In the online shop a visitor can type a code before signing in. The shop checks it, keeps it through sign-in and checks it again once the customer is known: the total can change at that second check (a membership discount, for instance), and a code that no longer applies is dropped with its reason. At the till, the messages and the removal of a code are in Point of sale.

Order of the discounts

When several discounts meet on one sale, they are taken in this order, each on what is left of the step before:

1. the **membership** discount (**Discount card**);
2. the **promo code**;

3. the **manual discount** at the till.

Example: a basket of 100.00 with a 10 % card discount, a 5.00 code and a 5 % manual discount: 100.00, then 90.00, then 85.00, then **80.75**. Without the code, the same basket comes to 85.50 (5 % of 90.00 is 4.50). The online shop applies the first two steps; it has no manual discount.

A code's discount is shared over the lines it covers in whole cents, the leftover cent going to the largest line. A refund of one line gives back what was paid for it, after its share of the discount. The till side (typing the code, **Apply**, **Remove**, what the totals show) is in Point of sale.

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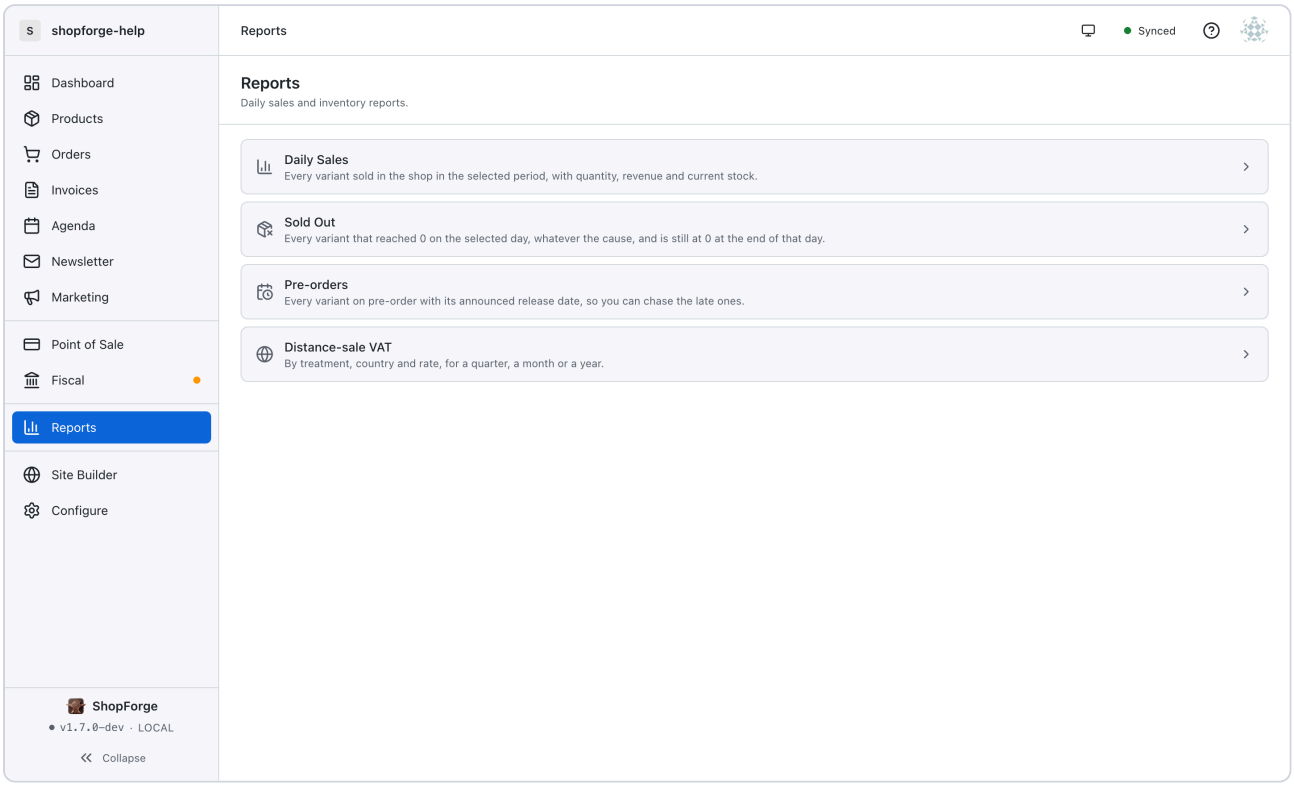
Reports

Open **Reports** from the sidebar for daily sales and inventory reports. Daily Sales, Sold Out and Pre-orders read from the local copy of your shop data, so they keep working offline. **Distance-sale VAT** is for admins and is computed by the server, so it needs a connection.

The report list



Reports are grouped in one list, each with a name and a one-line description. Click a row to open that report.

Daily Sales

Every variant sold **in the shop** in the selected period, with quantity, revenue and current stock. A product with several variants (formats, sizes…) has one row per variant.

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- **Period** — choose one of ten; **Last 24 hours** is where the report opens each time.
  - **Last 24 hours**, **Last 7 days** and **Last 30 days** count back from the moment you open the report or change the period.
  - **Today**, **Yesterday**, **This week**, **Last week**, **This month** and **Last month** follow your shop's calendar days. A week starts on **Monday**.
  - **Custom period** shows two dates, **From** and **To**; both days are included. Nothing runs until the second date is not before the first.

Only **in-store sales** are counted: sales rung up at the till, and orders an employee created in the shop. There is no channel choice. An **online order** is not counted here, and neither is a **pay-in-shop pickup of an online order** (it is counted once, as the online order it is), nor a **Discogs** order. Cancelled orders and training-mode sales never count. Refunds, avoirs and cancellations posted in the period are taken off.

Columns: **Title**, **Artist / Label**, **Variant**, **Barcode**, units **Sold**, **Revenue** and **Stock**. A totals row at the bottom sums **Sold** and **Revenue** across every row; **Stock** is not added up. Revenue is shown in the tenant's currency. The **Variant** column names the variant; a product that has only its default variant shows a dash.

Stock is the variant's stock **now**, as of the moment the report is computed, not at the end of the period: it tells you what is left to sell or reorder. A variant that is no longer in the catalogue shows a dash. A period with no in-store sale says "No in-store sales in this period."

Sold Out

Every variant whose stock reached zero on the selected day, **whatever the cause** (a sale, a manual adjustment or an import), and that is **still at zero at the end of that day**. A variant restocked the same day is not listed. Pick a past day to see what ran out then: restocking afterwards does not change that day's list.

- **Date** — pick any day; defaults to today. A count of matching products is shown next to the picker.

Columns:

- **Title**, **Artist / Label**, **Variant**, **Barcode**.
- **Cause** — what took the stock to zero: **Sold** (a sale in the shop or online), **Adjusted** (a manual change of the stock) or **Imported**.
- **Sold out at** — the time it reached zero, in your shop's time zone.
- **Units sold** and **Revenue** — that day's sales of the variant, all channels together, not only the sale that emptied the stock. A variant with no sale that day shows 0.

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- **Supplier · Purchase cost** — every supplier of the product with what you pay it, cheapest first and those without a cost last, for example `Distrib A : 8.00 € ; Distrib B : 9.50 € ; Distrib C : —`. The cost is internal and never shown to customers. The cell is empty when the product has no supplier.
- **Price** — the selling price today (the listing's own price, else the variant's, else the product's), or a dash when none is set.

Today's sales made on this computer appear at once; a change made on another computer appears after the next synchronisation, on the day it happened.

Pre-orders

Every variant **on pre-order** with its announced release date, so you can see at a glance which ones are late and chase the distributor. A variant is on pre-order while pre-order is switched on and either customers are still waiting for it (open pre-orders) or it is still on sale as a pre-order with room left. A shipment that has only **partly arrived** stays on the report: the variant leaves once every pre-order has been handed over and no room is left, even if the pre-order switch is still on. Products in any status (draft, active, archived) are listed.

- **Status** — from the announced date, as calendar days in your shop's time zone:
  - **Arrived**: the units received cover the customers' open pre-orders, so they are ready to hand over, whatever the date. No delay is shown.
  - **Late**: the date has passed. **Delay** shows the number of days.
  - **Due this week**: today up to 7 days ahead.
  - **Upcoming**: later than that.
  - **No date**: on pre-order with no announced date. It is just as worth chasing.
- **Order** — Late first, oldest date first, then Arrived, No date, Due this week and Upcoming.
- **Filters** — **Status**, **Distributor**, **Category** and an announced-date range (**Announced from**, **Announced to**). A product with several distributors shows them separated by `;`, and the filter matches any one of them: filter on a distributor, then export, to get the list to send. Above the table, "N pre-orders, M late" follows the filters.

Columns: **Artist**, **Title**, **Format**, **Label · Catalog no.**, **Distributor**, **Announced release**, **Delay**, **Status**, **Customer pre-orders** (the number of open orders, the quantity and the date of the oldest one, 0 when nobody has ordered) and **Expected** (the quantity you expect to receive).

Export CSV saves the rows the filters leave, in the same order, as `preorders-YYYY-MM-DD.csv` (UTF-8 with a byte-order mark, so Excel reads the accents; `;` separated; dates as `YYYY-MM-DD`). It adds **Received** (the units that have arrived and are not yet handed over, empty when none), **Category**, **Product status** (Draft, Active or Archived), **Alerts** (the customers waiting for a back-in-stock alert on the product, the "Waiting" figure of Products), the SKU, the barcode

(EAN), the product id, the public product URL, the price and the tags. Admins also get the distributor's **purchase cost**. The public URL stays empty when your shop has no web address yet, or when the site settings could not be loaded (you are offline: export again when connected). The release date's history is not kept: to see a change, compare two exports.

Distance-sale VAT

For admins only. The VAT of your **online orders**, from the storefront and from Discogs, by how it was charged, for the period of your OSS return (the *one-stop shop*, see VAT on distance sales). It needs a connection: the server computes it each time you open it or change the period. It is not signed, and it is outside the Global Z report.

- **Period** — **Quarter** (the default, the last full quarter, with a year and a quarter to choose), **Month** or **Year**.
- **Table** — one row per **Treatment**, **Country** and **Rate**, with the amounts **Excl. VAT**, **VAT** and **Incl. VAT**, and a **Total** row. A row of goods sold under the margin scheme is tagged **Margin** and stays apart from the normal row of the same rate.
- **Download CSV** — the same table, one row per line, amounts in cents, separated by semicolons.

The treatments are the ones an order shows in its detail: **French VAT**, **Destination VAT, OSS** (the VAT of the buyer's country, declared through the OSS; the country has its own column, Northern Ireland as XI), **Intra-community supply, exempt** and **Export, exempt**. An order without a treatment counts as French VAT.

What is counted:

- an online order counts whole **on the day its payment was captured**; a Discogs order on the day it was created, once it is confirmed and not cancelled;
- a refund or credit note of an order, from the shop or from Discogs, is **subtracted on the day it was recorded**, on the row of the order it reverses. A refund made in a later period shows there, as a negative figure, and leaves the earlier period as it was;
- in-store sales and their refunds at the till are not counted: the register's closures carry them. A till refund of an online order's receipt (see Refund an online order's receipt) is counted, like a refund of the order, on the day it was recorded.

The report gives the figures for the return. ShopForge does not file it. The accounts and rates it relies on are set in VAT on distance sales.

Related

- Products — the catalogue a report's rows link back to
- Orders — the sales a report summarizes

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- Discogs sales — the Discogs report, with its own VAT table
- Point of sale — in-shop sales counted in the In-shop column

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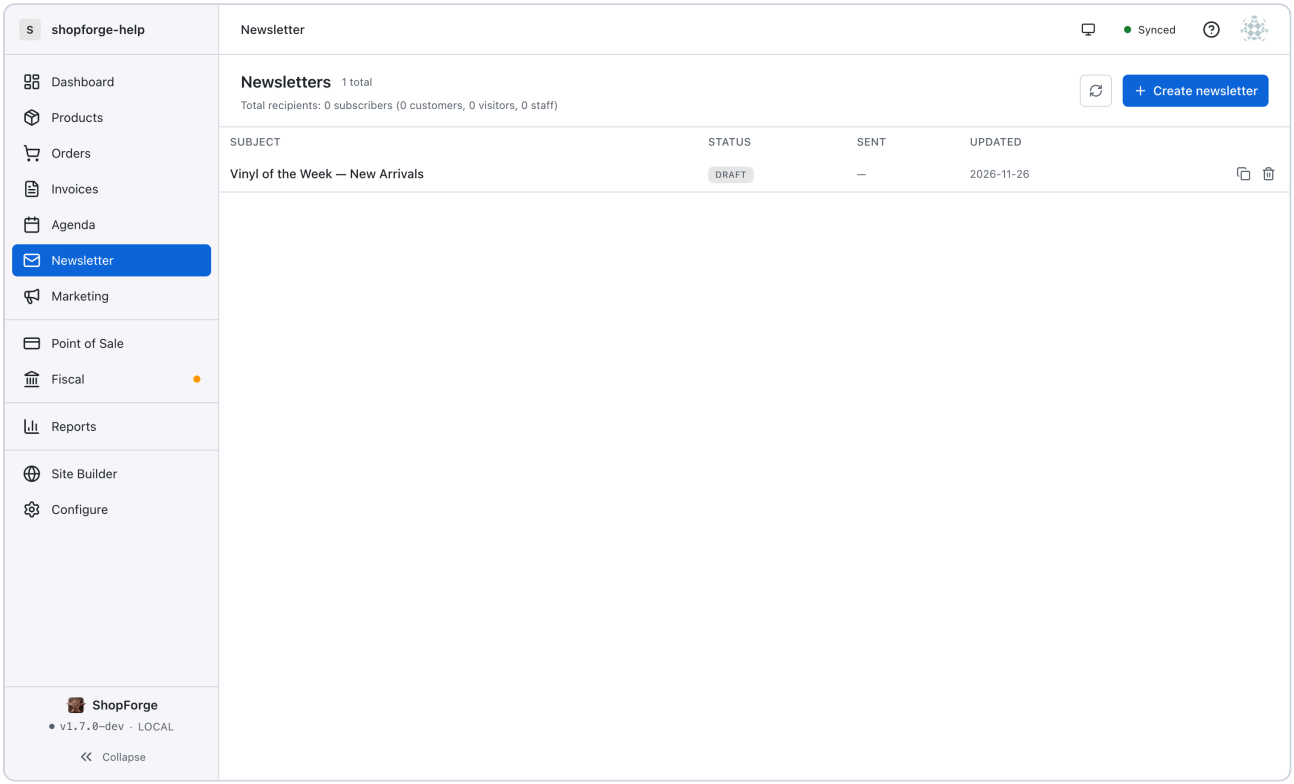
Newsletter

The newsletter emails your subscribed customers automatically or on demand. It is built with a drag-and-drop block editor, and the tenant decides when it goes out — weekly, every two weeks or monthly — plus the weekday to send on.

Unlike most of the backoffice, the newsletter module talks straight to the server: the list, the editor and the send all need a working connection. There is no offline queue here (see Offline & sync).

Manage newsletters



The **Newsletters** tab lists every newsletter, current draft first, then the sent ones (most recent first). Columns: Subject, Status, Sent, Updated.

It also displays the total recipient breakdown by subscriber type:

- **Total recipients / subscribers**: The overall count of targeted recipients.
- **Customers**: Registered clients who have made a purchase or have an active account.
- **Visitors**: Unregistered or guest subscribers who signed up via forms.
- **Staff**: Internal team members included in the dispatch.

Available actions:

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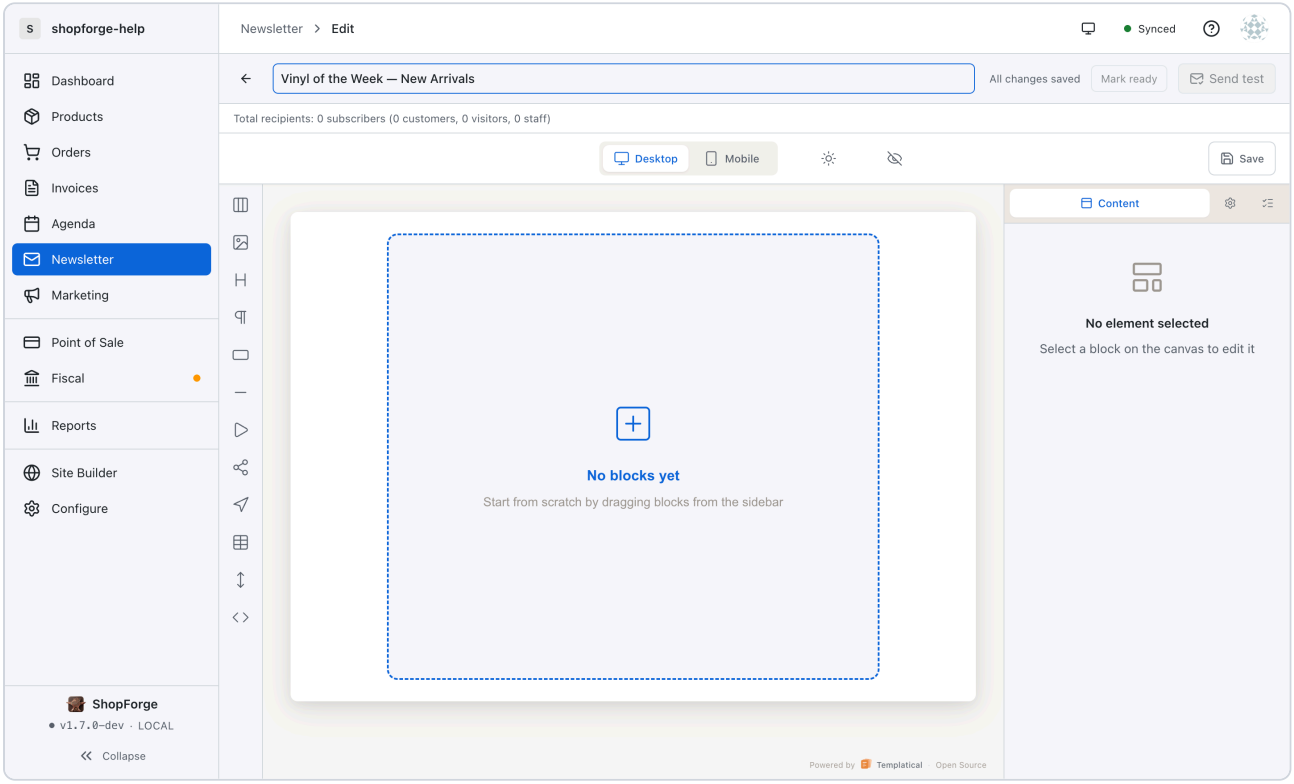
- **Create newsletter** — a single step: periodicity and language come from the tenant configuration (no fields to pick), and the new draft opens in the editor immediately.
- **Status** — **Draft** (grey), **Scheduled** (blue — the draft has been marked ready) and **Sent** (green). A scheduled draft also shows a hint like "will auto-send next Tuesday, on 2026-09-08".
- Clicking a **sent** row opens its detail view; clicking a draft opens it in the editor.
- **Duplicate** — copies the subject line and body onto a fresh draft, so you can prep the next issue from the previous one.
- **Delete** — asks for confirmation; deleting a sent newsletter also warns that the historical record (recipients, distribution dates, sent content) is lost. In practice the server refuses to delete a sent newsletter.

If several newsletters are **Scheduled**, they will all be sent at the scheduled day and time.

Write a newsletter



Opening a draft lands on the editor:

- **Subject** — the subject line, autosaved as you type (with a short delay).
- **Body** — built with the Templatical block editor: drag, drop and edit content blocks on a visual canvas.
- It also displays the **total recipient** breakdown by subscriber type.

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Send a test

Before you mark a newsletter ready, check how it looks in a real mailbox. **Send test**, in the top bar before **Send now**, sends the current draft to one address. Your subscribers receive nothing.

- The button is on every draft, ready or not. It is off while the newsletter has no content, with the hint "Add some content to send a test".
- It opens a dialog. **Send to** is filled in with your own sign-in address; change it to send to another mailbox. The dialog shows the **Subject** the email will carry — your subject after **[Test]** — and says the draft goes out in the newsletter's language. Press **Send test**, or Enter; Esc closes the dialog.
- An address that is not valid turns the field red, "Enter a valid email address.", and nothing is sent.
- When it is sent, the dialog closes and a message says "Test email sent to" your address. It can take a minute: check the spam folder too.
- If the shop's email settings are missing or the mail is refused, the dialog stays open, keeps the address and says the test could not be sent, with a link to **Configure → Integrations** to check the email settings.

The test is the draft as saved: any edit you have not seen saved is saved first. The unsubscribe link at the foot of a test does not work, since you are not a subscriber. A test changes nothing: the newsletter stays a draft and nothing is marked as sent. There is no limit to the number of tests. Once a newsletter is sent, it has no **Send test**.

Mark ready and send

A draft has two phases:

1. **Mark ready** — freezes the version you actually reviewed; the header shows the **Ready** badge from then on.
2. **Send now** — appears once the version is ready. It asks "Send this newsletter now?" and explains that it "immediately emails every subscribed user. This can't be undone.". It also displays the total recipient breakdown by subscriber type.

Mark ready needs content and a subject. While the newsletter has no content (no block), or no subject, the button is off and says "Add some content to mark this newsletter ready" or "Add a subject to mark this newsletter ready" (the content comes first when both are missing). **Send now** is off too while there is no content: "Add some content to send this newsletter". An empty newsletter is never sent, not even by the automatic send.

A ready newsletter goes back to a draft by itself when you delete its last block or clear its subject: the **Ready** badge and the auto-send hint disappear and a message says "This

newsletter is empty, so it is no longer ready." or "This newsletter has no subject, so it is no longer ready.". Add the content or the subject back and mark it ready again.

It can also send itself: when a send day is configured, a ready, not-yet-sent newsletter goes out automatically on the next occurrence — "Will also auto-send on the next Tuesday, on 2026-09-08, if not sent manually first".

Recipients are all **subscribed users**. Sending fan-outs one job per recipient; the distribution is stamped "ended" once every job has been accounted for.

Auto-send schedule

The cadence and language come from **Configure → System**, in the **Newsletter** tile (admin only):

- **Frequency** — Weekly, Every two weeks or Monthly.
- **Language** — the newsletter's language (English or French).
- **Send newsletter on** — the weekday to send (optional).

Saving a frequency and a send day configures the tenant's send schedule; clearing the send day removes it. Auto-sends fire at 08:00 UTC.

Sent newsletters

Opening a sent newsletter shows its record:

- **Sent by** — the user who sent it (or the system for an auto-send).
- **Sent to** — the number of subscribers, and **Bounced** — not tracked yet.
- **Distribution started** and **ended** dates.
- A preview of the exact newsletter that went out.

Related

- Configure → System — admin — frequency, language, send day
- Offline & sync — the newsletter module needs a live connection, unlike most of the backoffice

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Site builder

The **Site Builder** (sidebar → **Site Builder**) is where you design your shop's storefront: pages, sections, theme, header and footer. Your changes only reach the online site once an administrator **publishes** the current version.

Unlike most other modules, the Site Builder **requires a connection**: it is not available offline.

The editor layout

Three areas sit side by side, each resizable by dragging its edge:

- **Navigator** (left) — the site outline: Theme, Header, Footer, the list of Pages and, inside each page, its sections.
- **Canvas** (centre) — a live preview of the page being edited, including the header and footer, at the selected viewport size.
- **Inspector** (right) — the settings for the current selection (a page, a section, the theme…).

The top bar holds the key actions:

- **Visual | Code** — the editing mode; **Code** shows and edits the raw site configuration JSON (it must keep the `nav`, `pages`, `theme`, `header` and `footer` fields).
- **Desktop | Tablet | Mobile** — the preview viewport.
- **Undo / Redo** and the changes indicator (**Unsaved changes** vs **All changes saved**).
- **Preview in browser** — opens, in your default browser, the page the canvas shows (the home page when no page is selected).
- **Version history**, **Save** and **Publish site**.

Pages

The navigator lists your pages, with badges for **Home**, **Product**, **Agenda**, **Account**, **Confirmation**, **Artist** and **Brand**. Use **Add page** to create one (you are prompted for its title). Select a page to edit it in the inspector:

- **Page settings** — Title, **URL slug** (required and unique), **Navigation label**, **Show in navigation**, and **Set as homepage**.
- **URL pattern** (product and agenda entry pages) — literal segments are decorative: for products you may include the `{artist-slug|brand-slug}` token, but `{slug}` is the real key and must be the last segment. The slug is the product's key, not its full URL.
- **URL pattern** (artist and brand pages) — a prefix of its own, then `{slug}` last, e.g. `/artists/{slug}`. Empty means those pages are off.

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- **SEO** — **SEO title**, **Meta description**, **Social share image** and **Canonical URL**; left blank, the description falls back to a summary of the page's first text block. Only standard pages have these fields: the other pages (product, agenda entry, artist, brand, account, confirmation) derive their SEO automatically and cannot be edited here.

You can delete a page (with confirmation), and organise its sections.

Each dedicated page type has its own chapter:

- Product page — the template product pages render through
- Agenda entry page — the template agenda entry pages render through
- Account page — the customer's dashboard page
- Artist page — the template every artist's page renders through
- Brand page — the template every brand's page renders through

Sections

Each page is a stack of sections. **Add section** opens a picker with all 35 section types — grouped below, each with its own chapter describing what it does and its settings.

Content sections:

- Hero, Catalog, Rich text, Divider, Custom HTML, External link carousel (logos, press), Video gallery

Product sections (product page only):

- Product hero (gallery + info), Product gallery, Product info, Product description, Product grid, Product carousel (1 row), Recommended products, Customers also bought

Agenda entry sections (agenda entry page only):

- Agenda entry hero (image + info), Agenda entry title, Agenda entry description, Agenda entry date, Agenda entry gallery, Agenda entry location, Agenda entry location map, Agenda entry location + map

Artist and brand sections (their own page only):

- Artist hero (image + biography), Brand hero (image + description)

Agenda-list sections (standard pages only):

- Agenda preview, Agenda filter, Agenda calendar, Agenda filter + calendar, Agenda (filter, calendar + list)

Other sections:

- Addresses, Contact form, Account dashboard, Newsletter signup

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Every section has a **Label** and a **Visibility** setting (**Visible on desktop**, **Visible on tablet**, **Visible on mobile**). A section switched off for a device is hidden on that device only, and shown on the others: mobile is a screen narrower than 768 px, tablet 768 px up to 1023 px, desktop 1024 px and wider. Switched off on all three, it is not shown anywhere. **Max width** and, on some sections, **Height** are in the section's own settings, next to the other type-specific controls — for example a product grid's query (category, search text, **In stock only**, dynamic AND/OR groups of brand/artist/genre/style/tag conditions), the catalog's search bar and **Facets** (Brand, Artist, Genre, Style), up to 10 hero slides, or video gallery links (YouTube, Arte.tv and Dailymotion are detected automatically).

Custom HTML runs your HTML, scripts included, in a frame isolated from your shop's pages: it cannot change them, and you set its height yourself. Use it only if you know what you are doing. One older section type is no longer offered when you add a section: Store locator (use **Addresses** for your locations). A page that already holds one keeps it, as a placeholder.

Theme, header and footer

Select **Theme** in the navigator to edit the shop's look:

- A **Preset** or **Custom** scheme, with **Primary**, **Secondary**, **Background**, **Surface**, **Text** and **Muted text** colours.
- **Heading font** and **Body font** (family and weight), **Border radius** (None, Small, Medium, Large, Full (pill)), **Icon pack** and the **Site language** (English or French).
- **Buttons** (**Button background**, **Button text**) and **Hero button** (**Hero button background**, **Hero button text**) colours; **Add hover effect** gives each its own **Hover background** and **Hover text**.
- **Shop display name**, **Logo URL** and **Favicon URL**.
- **Default image**, used for products, artists, brands, agenda entries or articles with no image.

If a text colour is hard to read on the colour behind it (the text on the background, the muted text on the surface, or the text of a button on its button colour), the editor shows a warning with the contrast it measured. The muted text on the background gets one too: it is the border of the form fields on your site (inputs, selects and text areas), and it needs at least 3:1 to be clearly visible. It is only a warning, so you can keep your colour. **Use an accessible colour for …** sets the text to black or white, whichever reads better, and leaves the background as it is. Aim for a contrast of at least 4.5:1 for text, and 3:1 for the border of form fields.

Header — logo placement (Left, Centered), logo height, icon size, **Navigation position**, nav font, max width, height, **Sticky on scroll**, and whether to **Show search icon** and **Show cart icon**.

Footer — columns of **Links**, **Social icons** or **Addresses** (the **Addresses** column carries your contact details; the newsletter has its own section), social rows for Instagram, Facebook, Twitter, TikTok, YouTube, Reddit and Discord, and the **Copyright text**: it is shown as you type it, and left empty the footer shows © and your shop's name and the year instead. "Powered by ShopForge"

follows in both cases. An **Addresses** column has a **Show opening hours** switch, on by default, that shows each location's opening hours and note under its address. The footer's content sits in the same centred container as the header, whose **max width** it follows; its background still runs edge to edge.

Save and version history

Save stores the current configuration as a version. The **version history** lists the most recent saved versions (up to five): each one can be **Load**ed back onto the canvas, shows a **Currently loaded** badge when it is the one you are working from, and a **Published** badge when it is the version live on the site.

Save and publish

Save only saves your draft as a version. It publishes nothing: the online site keeps the theme and the pages of the **published** version until you publish.

When the design is ready, **Publish site** publishes the version you are working on. It becomes the published version, and the theme, the header and the footer, the app files and every page that is not a catalogue page (the homepage, the content pages, the catalog page itself) go out at once. The toast says "Site published. The pages update within a few minutes." The product, artist, brand and event pages are not sent by it: they follow the catalogue (see The site follows the catalogue).

Publish site first copies the images your pages take from other websites into your shop's own storage, and reads **Preparing images…** meanwhile. If an image cannot be imported, a question names it and where it is used: publish anyway, and it keeps its external address, or cancel and fix it.

On a site that has never been published, **Publish site** generates and publishes the whole site, once, through **Generating…**, **Uploading…** and **Deploying…** stages, then confirms **Site generated and published** (or reports a failure). After that it never generates the whole site again, not even when the published state of the site is lost: that state is rebuilt, nothing is sent again.

A site cannot be published without the pages it needs. If any is missing, **Publish site** opens **This site can't be published yet** instead, with one line for each missing page, and nothing is published. The site needs:

- a **homepage**;
- a **product page** template;
- an **account page**;
- a **confirmation page** holding a message for each of **Order confirmed**, **Newsletter subscription confirmed** and **Newsletter unsubscribed**.

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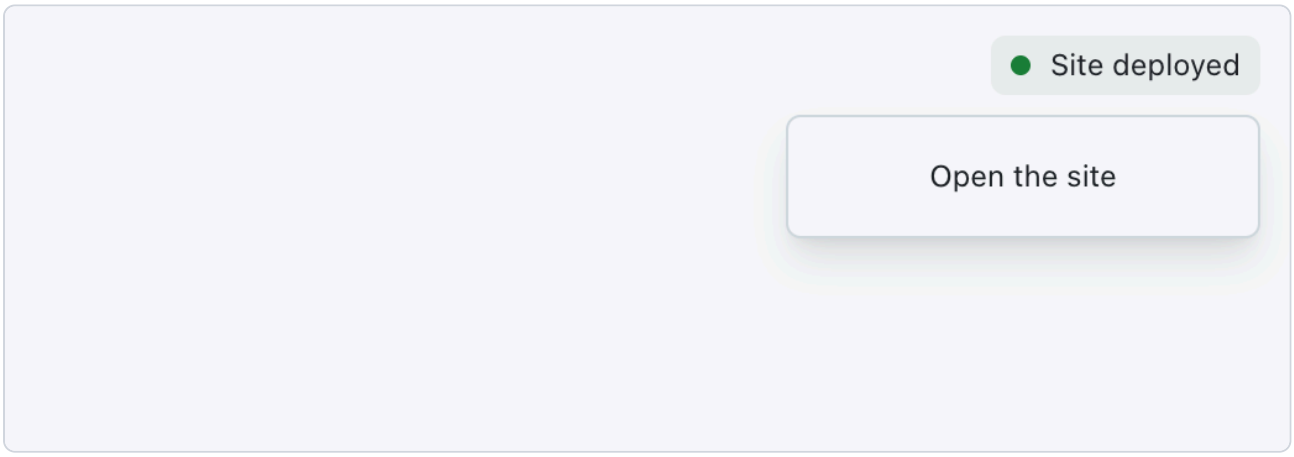
Add or restore what the dialog names, then try again. **Save** still works while pages are missing, so you can keep your draft. The catalog page and the event, artist and brand pages are not required. A new site already has everything.

Only **administrators** can publish: employees see the button disabled, with a hint that says so. If edits of this computer are not sent yet, **Publish site** waits and says so: "Publish site waits: 1 change on this computer is not sent yet. See Synced." (or its plural). Only catalogue edits hold it: sales and other fiscal records waiting to be sent never do. While the first generation of a site runs, **Publish site** reads **Generating…** and is disabled, also if you leave the Site Builder and come back or reload the window; only one generation runs at a time. If a second start still gets through, a message says "A site generation is already running" and the first one carries on. If a publication is already under way (of the catalogue pages, or on another computer), **Publish site** says "Publishing is already under way: click Publish site again when it ends." and does not report a failure. Click it again once that publication has ended: the theme, header, footer and the other pages go out only with **Publish site**. Use **Preview in browser** to check the result.

The site follows the catalogue

You do not have to press **Publish site** to keep the products of the online shop up to date. When a product, article, artist, brand, tag or agenda entry is added or changed, the pages it touches appear on the site on their own, a few minutes later, with nothing to press. Only **catalogue pages** do: product, artist, brand and event pages, the ones removed, and the numbered catalog pages (`/page/2` and so on), which follow the catalogue so that a new product stays reachable. Stock is never part of it: the site always shows the live stock. Once a site is published, the **Site deployed** indicator in the top bar opens the site: click it, then **Open the site**.



On a test environment (the login page shows a `DEV`, `INT` or `STAGING` badge), only the homepage is published: every other page opens live from the app, and the catalogue has no page to publish. Your live shop publishes every page, for search engines.

The theme, the header and the footer, the app files, the homepage and every other page go out only with **Publish site**.

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A product, artist, brand or agenda entry whose image is still being processed waits and appears once it is ready. One whose image failed is published without it.

A change made outside the builder (a location, a shipping fee, the shop settings, the product schema in **Configure → Schema**, the site address, the hide-from-search-engines switch) reaches the product, artist, brand and event pages that show it on its own; the other pages follow at the next **Publish site**. Changing the sections of the product, artist or brand page changes no page: the app reads them when it opens.

After an app update

An app update changes nothing on the site by itself, and asks for nothing. The site keeps the previous version of the app until the next **Publish site**, which sends the new one with the theme.

Related

- Newsletter — the storefront newsletter sign-up section
- Integrations — admin — the AI provider behind the site builder assistant

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Product page

The **Product page** is the template a product renders through.

What this page is

- A template page for a single representative product: the storefront renders whichever real product the URL points to through your design.
- There is one product page: you design the look once, and every product is published as its own page through it (see The site follows the catalogue).
- Badged **Product** in the navigator.
- **Set as homepage** is disabled for this page type.
- In a new shop, the artist and brand names in the product hero link to their own pages (the artist and brand pages are on by default), which gives search engines a way from every product to its artist and label. A shop that already existed keeps its setting; switch it with **Artist link** and **Brand link** in the product hero, and make sure the artist and brand pages are on (see Artist page and Brand page).

Page URL pattern

- The pattern decides the URL shape of your product pages.
- Literal segments are decorative and must match the request exactly.
- For products you may add the optional `{artist-slug|brand-slug}` token, right before `{slug}`.
- `{slug}` is required exactly once and must be the **last** segment — it is the real lookup key (the product's key). The slug is the product's key, not its full URL.
- The inspector rejects invalid patterns with an error.

Sections you can add

Product sections (product page only):

- Product hero (gallery + info), Product gallery, Product info, Product description, Recommended products, Customers also bought

You can also add these content sections next to them:

- Hero, Product grid, Product carousel (1 row), External link carousel (logos, press), Video gallery, Custom HTML, Divider

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The page-level sections are not offered here (catalog, newsletter signup, addresses, the agenda-list sections, rich text, contact form and store locator), and neither are the agenda entry and account sections.

The seeded page ships a **product hero**, a **product description** and a **recommended products** band.

Related

- Site builder — pages, sections, theme, header and footer
- Products — the products your page showcases

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Agenda entry page

The **Agenda entry page** is the template a single agenda entry renders through.

What this page is

- A template for a single agenda entry: the storefront renders whichever real agenda entry the URL points to through your design.
- The page resolves its agenda entry the same `{slug}`-token-URL way as the product page.
- Badged **Agenda** in the navigator.
- **Set as homepage** is disabled for this page type.

Page URL pattern

- Agenda entry pages use the exact same mechanics as product pages.
- Literal segments are decorative and must match the request exactly.
- `{slug}` is required exactly once and must be the **last** segment — it is the real lookup key (the agenda entry's key). The slug is the agenda entry's key, not its full URL.
- The inspector rejects invalid patterns with an error.

Sections you can add

Agenda entry sections (agenda entry page only):

- Agenda entry hero (image + info), Agenda entry title, Agenda entry description, Agenda entry date, Agenda entry gallery, Agenda entry location, Agenda entry location map, Agenda entry location + map

You can also add these content sections next to them:

- Hero, Rich text, Divider, Custom HTML, External link carousel (logos, press), Video gallery

The agenda-list, product and account sections, as well as the other content sections, are not offered on this page.

The seeded page ships an **agenda entry hero**, an **agenda entry description** and an **agenda entry location + map**.

Related

- Site builder — pages, sections, theme, header and footer

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- Agenda — the agenda entries your page showcases

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Account page

The **Account page** is the customer's account dashboard page.

What this page is

- The page customers reach by signing in: their account dashboard. A new site ships it with one **Account dashboard** section.
- Badged **Account** in the navigator.
- **Show in navigation** is off for it by default, and search engines are asked not to index it.

Page URL pattern

- The account page has no URL pattern: its address is its **URL slug** (`/account` on a new site). Customers land on it after signing in.

Sections you can add

- Account dashboard — the customer's account; it is offered on this page only.
- Next to it you can add the sections of a standard page: the content sections, the catalog, product grid and product carousel, addresses, contact form, newsletter signup, and the agenda-list sections except **Agenda (filter, calendar + list)**. The product, agenda entry, artist and brand sections are not offered here.

Related

- Site builder — pages, sections, theme, header and footer
- Sign in and manage your session — how customers reach their account

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Artist page

The **Artist page** is the template every artist's own page renders through: one design, one page per artist (musician, author, designer).

What this page is

- A template for a single artist: the storefront renders whichever real artist the URL points to through your design.
- Badged **Artist** in the navigator.
- **Set as homepage** is disabled for this page type.
- There is only one Artist page. It cannot be added with **Add page**: every site already has one.

Switching the pages on or off

- **The pages are off while the URL pattern is empty.** No artist page is generated, and nothing is published.
- A site created before this page type existed receives the Artist page switched off: design it first, then set a URL pattern to switch it on.
- Clearing the URL pattern switches the pages off again at the next **Publish site**.
- While off, the page can still be designed: the canvas previews it with a placeholder artist.

Page URL pattern

- The pattern is a **prefix of its own** followed by `{slug}`, e.g. `/artists/{slug}` or `/band/{slug}`. `{slug}` is the artist's key and must be last.
- The prefix must not be used by any other page: not by the product or agenda entry URL pattern, not by the Brand page, and not by any page's slug. If products use `/produit/…`, this page cannot use `/produit/…`.
- Some prefixes are reserved by the platform (`cart`, `checkout`, `search`, `api`, `assets`, `sitemap`…) and are refused.
- The inspector shows the error and names the page that already uses the prefix. A site whose URL settings clash cannot be saved.

Which artists get a page

- A page is published for every active artist that is linked to at least one active product, and listed in the sitemap. Pages follow the catalogue: they appear on the site on their own, with nothing to press.

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- An artist just added is still shown when a visitor reaches its URL; its own built page follows on its own.
- The canvas previews the page with one of your artists, so you see real content.

Sections you can add

Artist section (this page only):

- Artist hero (image + biography)

Products:

- Product carousel (1 row) and Product grid, with the option **Only this artist's products**.

Content sections:

- Hero, Rich text, Divider, Custom HTML, External link carousel (logos, press), Video gallery

The page ships with an **Artist hero (image + biography)** and a **Product carousel** limited to the artist's products.

Stopping a page

- To stop publishing one artist's page, **archive** the artist. Its products stay on sale and keep showing the artist's name.
- Visitors are shown *page not found* at once, but the page published earlier stays online — search engines and link previews still see it — until the site next updates on its own, which removes the page and its sitemap entry.
- Archiving keeps the artist's record. Removing a page already indexed by search engines (e.g. a removal request in Google Search Console) is done on the search engine's side.

Related

- Site builder — pages, sections, theme, header and footer
- Artist hero (image + biography) — the top of this page

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Brand page

The **Brand page** is the template every brand's own page renders through: one design, one page per brand (record label, publisher, manufacturer).

What this page is

- A template for a single brand: the storefront renders whichever real brand the URL points to through your design.
- Badged **Brand** in the navigator.
- **Set as homepage** is disabled for this page type.
- There is only one Brand page. It cannot be added with **Add page**: every site already has one.

Switching the pages on or off

- **The pages are off while the URL pattern is empty.** No brand page is generated, and nothing is published.
- A site created before this page type existed receives the Brand page switched off: design it first, then set a URL pattern to switch it on.
- Clearing the URL pattern switches the pages off again at the next **Publish site**.
- While off, the page can still be designed: the canvas previews it with a placeholder brand.

Page URL pattern

- The pattern is a **prefix of its own** followed by `{slug}`, e.g. `/brands/{slug}` or `/label/{slug}`. `{slug}` is the brand's key and must be last.
- The prefix must not be used by any other page: not by the product or agenda entry URL pattern, not by the Artist page, and not by any page's slug. If products use `/produit/…`, this page cannot use `/produit/…`.
- Some prefixes are reserved by the platform (`cart`, `checkout`, `search`, `api`, `assets`, `sitemap`…) and are refused.
- The inspector shows the error and names the page that already uses the prefix. A site whose URL settings clash cannot be saved.

Which brands get a page

- A page is published for every active brand that is linked to at least one active product, and listed in the sitemap. Pages follow the catalogue: they appear on the site on their own, with nothing to press.

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- A brand just added is still shown when a visitor reaches its URL; its own built page follows on its own.
- The canvas previews the page with one of your brands, so you see real content.

Sections you can add

Brand section (this page only):

- Brand hero (image + description)

Products:

- Product carousel (1 row) and Product grid, with the option **Only this brand's products**.

Content sections:

- Hero, Rich text, Divider, Custom HTML, External link carousel (logos, press), Video gallery

The page ships with a **Brand hero (image + description)** and a **Product carousel** limited to the brand's products.

Stopping a page

- To stop publishing one brand's page, **archive** the brand. Its products stay on sale and keep showing the brand's name.
- Visitors are shown *page not found* at once, but the page published earlier stays online — search engines and link previews still see it — until the site next updates on its own, which removes the page and its sitemap entry.
- Archiving keeps the brand's record. Removing a page already indexed by search engines (e.g. a removal request in Google Search Console) is done on the search engine's side.

Related

- Site builder — pages, sections, theme, header and footer
- Brand hero (image + description) — the top of this page

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Hero

The **Hero** section is a full-width slideshow for the top of a page, with up to 10 slides.

What this section does

- Shows a full-width slideshow at the top of the page, one slide at a time.
- Each slide carries its own image, title, subtitle and call to action.
- With several slides it advances by itself every 6 seconds. Visitors can stop it with the pause/play button, it also holds while the pointer is over it or focus is inside it, and it starts paused for visitors whose device asks for reduced motion.
- Available on **standard** pages and the **product** and **agenda entry** templates — never excluded.

Settings

- **Slide layout** — per slide: **Background Image** (a full-bleed image) or **Left Image** / **Right Image**, a 55/45 split that stacks below the `md` breakpoint.
- **Background image URL** — the slide's image.
- **Title** — the slide's title text.
- **Text** — the slide's subtitle text.
- **Link label** and **Link URL** — the call to action shown on the slide.
- **Text position** (**Background Image** layout only) — **Left**, **Center** or **Right**.
- **Height** — the slideshow's height in pixels (default 448).
- **Max width** — caps and centres the slideshow (default 1280); empty means full width.
- **Left margin** — offsets the text block from the slide's left edge (default 32).
- **Text color** — the text colour (default white).
- **Text shadow color**, **Shadow offset X**, **Shadow offset Y** and **Shadow blur** — an optional shadow behind the title and subtitle for legibility over busy images; the colour defaults to black, the offsets and blur default to 0 / 2 / 10, and an empty colour disables the shadow.
- **Image overlay** — how dark a black layer between the image and the text is, from 0 to 100 % (default 50 with light text, 0 with dark text). It keeps the title readable over a light image, on **Background Image** slides only; 0 turns it off.

Related

- Site builder — pages, sections, theme, header and footer
- Product page — the template product pages render through

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- Agenda entry page — the template agenda entry pages render through

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Catalog

The **Catalog** section is a faceted product-browsing block: a search bar, a sidebar of facets and the results grid.

What this section does

- Combines a search bar — always rendered first and never reorderable — with a sidebar of facets and the results grid.
- Lets customers search the catalog and narrow it down with facets and filters.
- A card of a new product that carries an eco-participation shows it under the price: "incl. eco-participation €1.50".
- Available on **standard** pages only — excluded on the **product** and **agenda entry** templates.

Settings

- **Category** — scopes the results to a single category; empty means the tenant-wide catalog.
- **Results** — the grid opens on 48 products, newest first, and **Load more** adds the next 48 until every match is shown. A **Sort by** control above the grid switches between **Newest**, **A–Z**, **Price: low to high** and **Price: high to low** (hidden while a search term is entered, since a search is ranked by relevance). **In stock only** pages like any other choice: 48 at a time, with **Load more** and the exact count. On the published site the query runs against the shop's search index; in the Site Builder preview, against the shop's local database.
- **Facets** — **Brand**, **Artist**, **Genre**, **Style**, **Tag** and **Category**, all shown by default; **Category** lists only the categories that have at least one product (under the section's **Category** setting, if you set one), each named by its own name only, in the site's language, for example *Vinyl* (not *Music › Vinyl*), in alphabetical order; typing a parent's name in the facet's search box still finds its categories (*Music* finds *Vinyl*), and two categories with the same name under different parents show as two lines; each has its own show/hide toggle and heading label (an empty label renders no heading). A heading you have not changed from its English default (**Brand**, **Artist**, **Genre**, **Style**, **Tag**, **Category**) reads in French on a French site; a heading you wrote is shown as you wrote it. Facet order is drag-reorderable, but the search bar always stays first.
- **Search bar** — **Show** (on by default); hidden, the whole search bar goes, not just its heading.
- **Search bar label** — the heading above the search bar (empty = no heading).
- **Search bar background image URL** — an optional image URL behind the search bar.
- **Search bar position** — **Top (above everything)** spans the full section width; **Left (above facet panel)** keeps the search in the sidebar column (the default).

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- **Availability filter** — **Drop-down** (the default) lets the customer choose all products, in stock or pre-orders; **None** hides it, and the catalog keeps every product.
- **Results grid layout** — **Auto (by card height)** sizes square cards by their **Card height** (default 220) and reflows to any viewport width; **Fixed (by number of columns)**, the default, renders exactly **Columns per row** columns (default 4, from 2 to 10).
- **Result count message** — **Inside the search bar**, **Above the facets** or **Above the product cards** (the default). It shows only when there are more matches than can be displayed.
- **Max width** — caps and centres the section (default 1280).
- **Show 'Out of stock' badge** — shows a red **Out of stock** pill at the top left of the card of a product that is out of stock (on by default). A preorder never gets it, and the **Preorder** and **Expected release** pills take its place first.

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Pagination

The catalog has two kinds of page, so that visitors and search engines each get what suits them.

- **The catalog page itself** (for example `/shop`) always shows the newest products first. **Load more** adds the next 48 without reloading, and the address in the browser does not change. Under the list, a small link, **All products, page by page**, leads to the numbered pages.
- **The numbered pages** are `/shop/page/1`, `/shop/page/2` and so on (on a homepage catalog, `/page/1`). Each holds 48 products in the order they were first published, and a product keeps its page: a new product goes on the last page, and a product you unpublish leaves its place empty, so nothing moves. They are for search engines, and for visitors who like plain links. A numbered page says "Page 2 of 5" instead of a count, its **Sort by** shows no current choice (picking one takes you to the catalog page), and it has no **Load more**. The stock badges on its cards follow the live shop.
- Below the grid of a numbered page, a row of links leads to **Previous** and **Next**, the first and the last page, and the two pages on each side of the one shown. The current page is not a link.
- The numbered pages follow the catalogue: they appear on the site on their own when you add or remove products, so there is nothing to press; only the pages those products touch change.
- Picking a facet, a sort order, an availability or typing a search always starts again from the first results, at the catalog page's own address with the choice in it.
- Search engines may index the catalog page and the numbered pages, and they are listed in the sitemap. A view with a facet, a sort order or a search is not indexed.
- Only the first Catalog section of a page has these pages.

Related

- Site builder — pages, sections, theme, header and footer
- Products — products you showcase in the catalog

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Product grid

The **Product grid** section shows a static grid of products selected by a query run against the shop's product database.

What this section does

- Renders the products as a grid, four columns across on desktop.
- **Rows** (1–3, default 2) expresses how many rows the grid fills — two rows is up to eight items — with **Max items** as the hard cap on top.
- It can be placed on **standard** pages, on the **product** page template, and on the **artist** and **brand** page templates, but not on the **agenda entry** or **account** pages.
- A product card of a new product that carries an eco-participation shows it under the price: "incl. eco-participation €1.50".

Settings

- **Title** — optional heading above the grid; empty means no heading.
- **When nothing matches** — a grid whose filters match no product is not shown on the published site; the Site Builder preview still shows it, with a hint.
- **Max items** — the hard cap on how many products are shown (default 12).
- **Max width** — caps the section's width in pixels (default 1024).
- **Category** — exact match on the category taxonomy; empty means no filter.
- **Search** — case-insensitive match on the product name or artist; empty means no filter.
- **Sort by** — the order of the products: **Default order** (as before; the default), **Newest first** (the latest arrival first: the last time stock was added by hand, else when the product was created), **A–Z** (by title, ignoring leading punctuation), **Price: low to high** or **Price: high to low** (a product with no price comes last in both, as in the catalogue). A **Search** term ranks the results by relevance instead and ignores this setting.
- **Availability** — **All products** (the default), **In stock only** or **Pre-orders only**. A pre-order has no stock; with **Pre-orders only**, the section is hidden when no pre-order is on sale.
- **Only this artist's products** / **Only this brand's products** — on the artist or brand page only: limits the section to the products of the artist (brand) the page shows, combined with the other filters. On a carousel whose **Show more link** goes to the catalog page, the link opens the catalog filtered by that artist (brand).
- **Dynamic query** — one or more groups of field-equals-value conditions on Brand, Artist, Genre, Style, Tag and Category; a product matches when it satisfies every condition of at least one group; empty means no extra filter.

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- **Rows** — how many rows of four the grid fills (1–3, default 2).
- **Show 'Out of stock' badge** — shows a red **Out of stock** pill at the top left of the card of a product that is out of stock (on by default). A preorder never gets it, and the **Preorder** and **Expected release** pills take its place first.

Related

- Site builder — pages, sections, theme, header and footer
- Products — the products these sections showcase

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Product carousel (1 row)

The **Product carousel (1 row)** section shows a single row of products, paged horizontally, selected by a query run against the shop's product database.

What this section does

- Renders the products as a one-row rail of square cards.
- The rail is arrow-paged only, with no native scrollbar: each click turns one full page and there is no looping — the arrow at an end disappears once there is nothing further in that direction.
- **Card height** sets the size of the square cards directly, so more or fewer cards fit per page depending on the value.
- It can be placed on **standard** pages, on the **product** page template, and on the **artist** and **brand** page templates, but not on the **agenda entry** or **account** pages.
- Does not repeat what it filters on. A tag that every group of the **Dynamic query** asks for is not stamped on the cards (they show the two newest other stamps), and a carousel that lists only pre-orders has no pre-order badge on its cards. A product grid is not affected.
- A product card of a new product that carries an eco-participation shows it under the price: "incl. eco-participation €1.50".

Settings

- **Title** — optional heading above the rail; empty means no heading.
- **When nothing matches** — a carousel whose filters match no product is not shown on the published site; the Site Builder preview still shows it, with a hint.
- **Max items** — the hard cap on how many products are shown (default 12).
- **Max width** — caps the section's width in pixels (default 1024).
- **Category** — exact match on the category taxonomy; empty means no filter.
- **Search** — case-insensitive match on the product name or artist; empty means no filter.
- **Sort by** — the order of the products: **Default order** (as before; the default), **Newest first** (the latest arrival first: the last time stock was added by hand, else when the product was created), **A–Z** (by title, ignoring leading punctuation), **Price: low to high** or **Price: high to low** (a product with no price comes last in both, as in the catalogue). A **Search** term ranks the results by relevance instead and ignores this setting.
- **Availability** — **All products** (the default), **In stock only** or **Pre-orders only**. A pre-order has no stock; with **Pre-orders only**, the section is hidden when no pre-order is on sale.

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- **Only this artist's products** / **Only this brand's products** — on the artist or brand page only: limits the section to the products of the artist (brand) the page shows, combined with the other filters. On a carousel whose **Show more link** goes to the catalog page, the link opens the catalog filtered by that artist (brand).
- **Dynamic query** — one or more groups of field-equals-value conditions on Brand, Artist, Genre, Style, Tag and Category; a product matches when it satisfies every condition of at least one group; empty means no extra filter.
- **Card height** — sets the size of the square cards directly (default 200; the inspector ranges 120–480).
- **Arrow position** — **Over the cards** (the default), **Above the carousel** or **Below the carousel**.
- **Show 'Out of stock' badge** — shows a red **Out of stock** pill at the top left of the card of a product that is out of stock (on by default). A preorder never gets it, and the **Preorder** and **Expected release** pills take its place first.
- **Show more link** — **Show a link next to the title** (off by default) adds a link beside the title. **Link destination** is **Catalog page (applies this carousel's filters)** or **Custom page URL**, with its **Page URL**. **Link text** is "Show more" when left empty.
- **Text** — an optional **Text (markdown)**, saved with **Apply**, shown **Below title** (the default) or **Below carousel** (**Text position**).

Related

- Site builder — pages, sections, theme, header and footer
- Products — the products these sections showcase

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External link carousel (logos, press)

The **External link carousel (logos, press)** section is a single-row, arrow-paged rail of external-link images — logos, press mentions and partners.

What this section does

- Presents a row of images that each link to an external site.
- All images share the same height but keep their own aspect ratio, so card widths vary — a good fit for press and partner logos.
- Paging is by **arrow**, one page per click, with no looping: an arrow disappears once there is nothing further on that side.
- Available on any page where sections are offered.

Settings

- **Title** — the heading (empty = no heading).
- **Image height** — the shared image height in pixels (default 64).
- **Max width** — caps and centres the rail (default 1024).
- **Links** — up to 20; each provides the **Image URL**, the **Alt text** and the **Link URL**, the outside address the image links to.
- **Background color** — follows the theme's background colour by default.

Related

- Site builder — pages, sections, theme, header and footer
- Product page — the template product pages render through
- Agenda entry page — the template agenda entry pages render through

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Video gallery

The **Video gallery** section is a titled grid of embedded videos — YouTube, Arte.tv and Dailymotion are supported, auto-detected from the URL.

What this section does

- Shows a grid of embedded videos with a section title.
- On desktop the grid follows the video count: an even count is a strict 2-column grid; an odd count is that same grid except the last row, which gets 3 columns (3 = one row of 3, 5 = 2 then 3, 7 = 2-2-3). Below the `md` breakpoint, one video per row.
- Available on any page where sections are offered.

Settings

- **Title** — the heading (empty = no heading).
- **Videos** — up to 12; each is a **Video URL** plus a **Title** that doubles as the embed's accessible label. The provider (YouTube, Arte.tv or Dailymotion) is detected from the URL — there is no provider field to set.
- **Max width** — caps and centres the grid (default 1024).
- **Background color** — follows the theme's background colour by default.

Related

- Site builder — pages, sections, theme, header and footer
- Product page — the template product pages render through
- Agenda entry page — the template agenda entry pages render through

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Custom HTML

The **Custom HTML** section is the escape hatch: your own HTML, scripts included, shown in a frame isolated from your shop's pages (it cannot change them) — use it only when no built-in section does what you need, for example a third-party embed snippet.

What this section does

- Runs the HTML as written, scripts included, in a frame isolated from your shop's pages, so it cannot change them.
- Unlike **Rich text**, where raw HTML is blocked, this section exists precisely to allow it.
- An embed (`<iframe>`) that has no `title` is given one naming the site it comes from (for example "Embedded content from open.qobuz.com"), so a screen reader announces more than "frame". Add your own `title` to the snippet to say more, for example `title="Qobuz player: Coups de cœur"` ; a title you wrote is never changed.
- Defaults to **full width** (empty Max width), because custom HTML often manages its own width — a banner, an embed.
- A warning reminds you to use it only when no built-in section does what you need, and that you set its height yourself.
- Available on any page where sections are offered.
- If your snippet loads a third-party player or widget (a Qobuz player, for example), it loads when the page opens, and obtaining your visitors' consent for it, and informing them, is up to you: ShopForge adds no consent banner to this section.

Settings

- **HTML** — the markup to display; it runs in the isolated frame, scripts included.
- **Height** — the height of the frame, in whole pixels from 50 to 4000, the same on every screen (default 400); taller content scrolls inside the frame.
- **Max width** — caps and centres the section; empty (the default) means **full width**.
- **Background color** — follows the theme's background colour by default.

Related

- Site builder — pages, sections, theme, header and footer
- Product page — the template product pages render through
- Agenda entry page — the template agenda entry pages render through

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Addresses

The **Addresses** section presents your shop's location addresses, stored in the backoffice, as a row of cards on the storefront.

What this section does

- Shows the addresses stored in the backoffice (Locations module) as equal-width cards.
- Cards always fill the row evenly across the configured number of columns.
- When **Show map on each address** is on, each card splits 50/50 between address text and a location map.
- The map is named by the address it shows, and its pin too, for screen readers; neither is a keyboard tab stop, and the **Open in OpenStreetMap** link under the map is the way to explore it further.
- Each location's phone number is a tap-to-call link, its email opens the mail app, and its address opens a map (OpenStreetMap) in a new tab; a bracketed `(0)` after the country code (`+33 (0)1 …`) is left out of the call link; a value that does not look like a phone number or an email stays plain text.
- Under each address, the location's own opening hours and note, as entered in the backoffice (Locations module), unless **Show opening hours** is off.
- Addresses sections can be placed on **standard** pages only.

Settings

- **Title** — the section's heading; empty means no heading.
- **Max width** — caps and centres the section in pixels (default 1024); empty means full width.
- **Per row** — 1 to 4 (default 3).
- **Show map on each address** — splits each card between text and a map; off by default.
- **Show opening hours** — shows each location's opening hours and note under its address; on by default. A location without hours or a note shows nothing extra.

Related

- Site builder — pages, sections, theme, header and footer
- Shop Locations — admin — manage your shop's locations

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Agenda preview

The **Agenda preview** section shows the storefront's upcoming agenda entries as a list.

What this section does

- Lists upcoming agenda entries, each entry with a thumbnail, a date badge, the agenda entry's title and a venue badge.
- The date badge shows the weekday, day, month and time in the shop's time zone (Europe/Paris) on a 24-hour clock, in the language of the page's agenda entries calendar when it has one and the site's language otherwise.
- Reads the agenda entries' data directly — there is no per-section agenda entry authoring.
- Available on **standard** pages only (not the product or agenda entry templates).

Settings

- **Title** — an optional heading (empty = no heading).
- **Max width** — caps and centres the list in pixels (empty by default = full width).
- **Background color** — the section's background (theme background by default).

Related

- Site builder — pages, sections, theme, header and footer
- Agenda — the agenda entries these sections show

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Agenda filter

The **Agenda filter** section narrows the agenda entries shown on the page by venue.

What this section does

- A heading plus a venue picker that narrows any **Agenda calendar** or **Agenda preview** on the same page, or stands alone.
- Filtering is **venue-only** for now — there is no agenda entry type facet yet.
- The venue choice is shared across the whole page: one **Agenda filter** narrows every **Agenda calendar** and **Agenda preview** placed elsewhere on that page, exactly like the filter+calendar's built-in sidebar narrows its own calendar.
- Available on **standard** pages only (not the product or agenda entry templates).

Settings

- **Title** — an optional heading (empty = no heading).
- **Filter label** — a small label above the venue picker itself (empty = no label).
- **Info notice** — an optional note under the filters, for example "all agenda entries are free entry unless stated otherwise".
- **Max width** — caps and centres the widget in pixels (empty by default = full width).
- **Background color** — theme background by default.

Related

- Site builder — pages, sections, theme, header and footer
- Agenda — the agenda entries these sections show

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Agenda calendar

The **Agenda calendar** section shows the page's agenda entries on a month calendar.

What this section does

- A month grid with a dot on each day that has agenda entries.
- An agenda entry's dot sits on its day in the shop's time zone (Europe/Paris), and the highlighted "today" is the shop's today, wherever the visitor is.
- **Previous** and **Next** month navigation; the calendar has no filter UI of its own.
- A page-level venue filter narrows it — a standalone **Agenda filter** on the same page behaves like the filter+calendar's built-in sidebar.
- Available on **standard** pages only (not the product or agenda entry templates).

Settings

- **Title** — an optional heading (empty = no heading).
- **Language** — English or French (default English); it is independent of the rest of the storefront's locale.
- **Weeks per row** — 1 or 2 (default 1); 2 halves the row count, so a 6-week month becomes 3 rows of 14 days instead of 6 rows of 7.
- **Weekend highlight** — optional background and text colours; off (no highlight) by default.
- **Max width** — caps and centres the calendar in pixels (empty by default = full width).
- **Background color** — theme background by default.

Related

- Site builder — pages, sections, theme, header and footer
- Agenda — the agenda entries these sections show

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Agenda filter + calendar

The **Agenda filter + calendar** section combines a venue filter with a month calendar in one widget.

What this section does

- A venue-filter sidebar next to a month calendar, for pages that want the combined control instead of composing **Agenda filter** and **Agenda calendar** separately.
- The calendar shows a dot on each day that has agenda entries. A column of four month buttons, starting with the current month, moves between months.
- The filter narrows the calendar by venue — venue-only, there is no agenda entry type facet yet.
- Available on **standard** pages only (not the product or agenda entry templates).

Settings

- **Title** — an optional heading (empty = no heading).
- **Language** — English or French (default English); it is independent of the rest of the storefront's locale.
- **Weeks per row** — 1 or 2 (default 1); 2 halves the row count, so a 6-week month becomes 3 rows of 14 days instead of 6 rows of 7.
- **Weekend highlight** — optional background and text colours; off (no highlight) by default.
- **Filter label** — a small label above the venue picker itself (empty = no label).
- **Info notice** — an optional note under the filters, for example "all agenda entries are free entry unless stated otherwise".
- **Max width** — caps and centres the widget in pixels (empty by default = full width).
- **Background color** — theme background by default.

Related

- Site builder — pages, sections, theme, header and footer
- Agenda — the agenda entries these sections show

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Agenda (filter, calendar + list)

The **Agenda (filter, calendar + list)** section shows the shop's agenda entries in one place: a venue filter, a month calendar and the list of entries. A visitor picks a venue or a day and the list follows.

What this section does

- One section instead of two: it replaces the pair **Agenda filter + calendar** and **Agenda preview**. The older sections stay as they are and nothing is converted. To use the new layout, remove the old sections from the page and add this one.
- It keeps its own selection (venue, day, **Upcoming** or **Past**), apart from the other agenda sections, so two of them on one page never fight over it.
- It follows the site language: month names, weekdays and every message are in the language of the site. There is no language setting.
- Available on **standard** pages only (not the product, agenda entry, account or confirmation pages).
- A page with an Agenda section is "the events page" of the site: the search panel's **view all** link for agenda entries goes to it.
- The entries come from the **Agenda** screen (Agenda). A section with no entry to show says so (Empty lists).

Settings

Select the section in the page to see its settings in four groups. An empty field keeps the default.

Title, filter label, info notice

- **Title** — an optional heading for the section (empty = no heading).
- **Filter label** — a small label before the venue buttons (empty = none).
- **Info notice** — an optional note under the venue buttons, for example "all agenda entries are free unless stated otherwise".

Layout

- **Layout** — **Calendar beside the list** (default) or **Calendar above the list**. Beside the list, the calendar is on the left and stays in view while the list scrolls; on a narrow section (under 900 pixels wide) it is always above the list, whatever the setting.
- **Weeks per row** — 1 or 2 (default 1). Shown only with **Calendar above the list**: 2 halves the number of rows, so a 6-week month becomes 3 rows of 14 days.

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- **Max width** — caps and centres the section in pixels, from 320 to 1920 (empty = full width).
- **Background color** — the theme background by default.

Event list

- **Show event pictures** — a picture on each row (on by default). An entry without a picture shows the shop's default image.
- **Show past events** — shows the **Upcoming | Past** switch, makes past days clickable in the calendar and lets the calendar go back in time (on by default). Off: upcoming entries only.
- **Past events go back** — how many months **Past** reaches, from 1 to 24 (default 12). Shown only with **Show past events** on. A shop with many entries may see a long window cut short: the site lists at most 100 entries in all.
- **Seats text** — the wording of the seats part of a row. Empty uses the default of the site language ("40 seats", « 40 places »). A custom text must contain `{count}` for the number, for example `{count} places assises`, and is used as written for every number, including 1.

Book link

- **Link text** — empty means "Book" (« Réserver » on a French site).
- **Link style** — **Button** (default: the same button as the product page's add button, in the shop's button colours), **Outline** (a border and text in the link colour, filled with that colour and white text on hover) or **Text link** (underlined text in the link colour).
- **Link color** — the theme primary colour by default. It applies to **Outline** and **Text link** only; with **Button** the link follows the shop's button colours and the field is hidden. The colour is not checked for contrast.
- **Open in a new tab** — on by default, with a small arrow after the text.

Calendar days highlights

- **Days with events** — **Dots** (default, up to three), **Background** (a tint of the colour) or **Dots and background**.
- **Event day color** — the colour of the dots and of the tint (theme primary by default).
- **Today color** — the ring around today (theme primary by default).
- **Selected day color** — the fill of the selected day (theme muted text by default).
- **Highlight weekend background** and **Highlight weekend text** — optional colours for Saturdays and Sundays, off by default.

Every colour field opens on **From theme**, so it follows the theme if the shop changes it; **Custom** pins a colour.

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The calendar and the filters

- **Venue buttons. All** and one button for each venue that has entries in the list shown, with the number of entries. Picking a venue narrows the calendar and the list, and clears the selected day. Venues that have no entry in the current list (**Upcoming** or **Past**) are not offered.
- **Month header.** The month and year, the number of entries of that month, **Previous** and **Next** buttons, and **Today** (shown only away from the current month). **Previous** stops at the earliest month that has a past entry (the current month when past events are off); **Next** stops at the month of the last upcoming entry.
- **Days.** Only a day that has entries is a button, read as "Saturday 14 November, 4 events" by a screen reader. Today has a ring, the selected day is filled, and a day shows up to three dots, then a "+". Past days are muted with grey dots. A day without entries does nothing.
- **An entry over several days** (a festival) is marked on every day from its first to its last, and each of those days counts it once. Picking any of them lists it. A night that runs past midnight, ending the next day at 05:00 or earlier, is one day.
- **Picking a day** filters the list to that day. A past day switches the list to **Past**, an upcoming day switches it to **Upcoming**; a past day of a festival that is still running keeps **Upcoming**. Picking the selected day again clears it. On a phone, the list scrolls into view after a day is tapped.
- **The filters bar** above the list says how many entries are listed ("4 upcoming events", then "2 events" once filtered). When a day or a venue is picked, each shows as a chip with a **×** that removes it, and **Clear all** removes both.

The event list

- Entries are grouped by month, with the month and year as a heading (the heading is hidden while a day is picked).
- Each row has a **date tile** (weekday, day, month), a square **picture** (64 pixels, 56 on a phone) when pictures are on, the **title** as a link to the entry's page, and a line of details: `time · venue · seats`. The seats part shows only when the entry has a number of seats and has not taken place.
- An entry over several days is **one row**, under the month of its first day. Its date tile shows the range ("22–24 Aug", or "30 Aug – 2 Sep" across two months) and the details line keeps the start time. It stays under **Upcoming**, with its Book link, until its last day is over, then moves to **Past**.
- An entry's tags set to **Stamp over image** show at the end of its details line, after the time, venue and seats, whether pictures are on or off (the two newest; they move to the next line when the line is full). Tags set to any other place do not show on a row.
- Entries that have taken place are muted and have no seats and no Book link.
- A day counts as past when it is before today in the shop's time zone, so an entry that starts today is still upcoming. An entry over several days counts as past when its last day is.

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Upcoming and past

The **Upcoming | Past** switch above the list shows how many entries each list has (the counts follow the venue filter). It appears only when **Show past events** is on. **Upcoming** lists the entries from today on, soonest first; **Past** lists the last months (**Past events go back**), newest first.

Empty lists

- **Past**, nothing to show: "No past events in the last N months."
- **Upcoming**, nothing to show: "No upcoming events." When another venue or day filter hides an entry that is coming up, the message also names the next one: "Next: *title*, *date*."

The Book link

An entry shows a Book link only when it has a **Booking link** (set on the agenda entry, see Agenda) and has not taken place. It uses the **Link text**, **Link style**, **Link color** and **Open in a new tab** settings above. An entry with no booking link shows no link and no other text.

Related

- Site builder — pages, sections, theme, header and footer
- Agenda — the agenda entries this section shows
- Agenda filter + calendar and Agenda preview — the older sections this one replaces

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Rich text

The **Rich text** section is a markdown text block for headings, lists, links and inline images — raw HTML is deliberately blocked.

What this section does

- Renders markdown content as a text block, with an optional side media column.
- Available on **standard** pages and the **agenda entry** template; excluded on the **product** template.

Settings

- **Text** — markdown text: headings, lists, links and inline images; raw HTML is not rendered.
- **Media position** — **None** (default), **On the left** or **On the right**; when set, the column renders one of an **image**, an embedded **video** (the source is auto-detected from the URL — no provider to pick) or an **address** (geocoded client-side into a map).
- With a side column, the text takes the remainder of the width — default split 40/60 (side/text).
- **Max width** — caps and centres the text block (default 672).
- **Text color** — follows the theme's text colour by default.
- **Background color** — follows the theme's background colour by default.

Related

- Site builder — pages, sections, theme, header and footer
- Agenda entry page — the template agenda entry pages render through

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Newsletter signup

The **Newsletter signup** section puts a newsletter sign-up form on the page.

What this section does

- Shows a title, an optional description, an e-mail field and a submit button.
- A visitor who subscribes still has to confirm by e-mail, so the success message should say to check the inbox.
- Subscribers are managed in the **Newsletter** module; the signup is a section you add to a page, not a footer column.
- Not offered on product pages or agenda entry pages.

Settings

- **Title** and **Description (optional)**.
- **Email field placeholder** and **Submit button label**.
- **Success message** — shown after submitting. Say "check your inbox", not "you're subscribed": a confirmation email is still required.
- **Max width** — caps and centres the section in pixels (default 480).
- **Background color**.

Related

- Site builder — pages, sections, theme, header and footer
- Newsletter — manage your newsletter subscriptions

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Divider

The **Divider** section is a coloured band that separates groups of sections — a plain spacer, or a row of stats once you add stat cards.

What this section does

- Inserts a visual break between groups of sections.
- Turns into a row of stats when it holds stat cards.
- Available on any page where sections are offered.

Settings

- **Height** — the band's height in pixels (default 48).
- **Stat cards** — up to 6; each shows a large bold **value** with a smaller **label** beneath, spread evenly across the band.
- **Text color** — follows the theme's text colour by default; it only has a visible effect once at least one stat card exists.
- **Background color** — follows the theme's background colour by default, so the band stays invisible until you change it.

Related

- Site builder — pages, sections, theme, header and footer
- Product page — the template product pages render through
- Agenda entry page — the template agenda entry pages render through

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Contact form

The **Contact form** section places a fixed contact form on your storefront. It is a fixed field set, not a configurable form builder.

What this section does

- Collects **name** and **email** (required), plus **phone**, **subject** and **message** (optional).
- Under the send button, a privacy line says what the details are for (by default "Your details are used only to answer your message." in an English site, in French on a French one), followed by a link to your privacy policy when you set one.
- A sent message is **emailed** to the contact recipient address set in the SMTP/Email integration settings; the message is not stored anywhere else. When no recipient is set, or the email cannot be sent, the form shows its error message instead of the success message.
- Optional supporting copy (markdown) is placed around the form via the rich text settings.
- The default texts are French regardless of the UI language: title "Contactez-nous", submit label "Envoyer" and success message "Merci, votre message a bien été envoyé. Nous vous répondrons rapidement."
- Contact form sections can be placed on **standard** pages only; they are excluded on the product and agenda entry templates.

Settings

- **Title** — the form's heading.
- **Submit button label** — the text on the send button.
- **Success message** — shown after a submission.
- **Error message** — shown when the message cannot be sent (default "Une erreur est survenue. Merci de réessayer plus tard.").
- **Privacy line** — the text under the send button; empty hides the line, not the policy link below.
- **Privacy policy link** — a path on your site (`/privacy`) or an `https://` address; empty shows no link.
- **Additional text (optional)** and **Text position** — optional supporting markdown placed around the form; the position is **Above the form**, **Below the form**, **Left of the form** or **Right of the form** (default **Above the form**). Empty content means no rich-text block, just the bare form.
- **Max width** — caps and centres the section in pixels (default 640).
- **Background color** — the theme background by default.

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Related

- Site builder — pages, sections, theme, header and footer

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Store locator

The **Store locator** section is an older, unfinished section type. It is no longer offered when you add a section: use Addresses to show your locations.

What this section does

- Is **no longer in the section picker**. It has no configuration form and no storefront rendering.
- A page that already holds one keeps it and shows a placeholder.

Settings

- There are no settings — the section type has no configuration form.

Related

- Site builder — pages, sections, theme, header and footer

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Product gallery

The **Product gallery** section shows the current product's image gallery.

What this section does

- Displays the product's images, with square thumbnails and a square main image.
- It belongs to the **product** page template only.

Settings

- **Max width** — caps the section's width in pixels (default 1024).

Related

- Site builder — pages, sections, theme, header and footer
- Product page — the template product pages render through
- Products — the products these sections showcase

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Product info

The **Product info** section is the buy box of the current product: price, stock status, and the add-to-cart and wishlist actions.

What this section does

- Shows the product's price and stock status. A new product that carries an eco-participation shows it apart under the price, "incl. eco-participation €1.50", as the product hero does.
- Shows the brands, the short description and the conditions line, as the product hero does. It does not show the **In hero** tags.
- Carries the add-to-cart and wishlist actions.
- **A customer's cart holds at most 250 lines**, the most one order can hold. Adding a 251st shows the customer a message under the button; adding more of an item already in the cart takes no new line, except as below. Each gift card with an amount the customer enters is its own line, so adding one again counts as a new line. A membership can be added once: adding another replaces it. A saved cart that already holds more than 250 lines shows a notice saying how many to remove, and checkout stays unavailable until it is within the limit.
- It belongs to the **product** page template only.

Settings

- **Max width** — caps the section's width in pixels (default 1024).

Related

- Site builder — pages, sections, theme, header and footer
- Product page — the template product pages render through
- Products — the products these sections showcase

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Product description

The **Product description** section lays out the current product's description together with the tracklist, for music products.

What this section does

- With **Layout** set to 1, the description and the tracklist stack as full-width blocks, one after the other; with 2 they sit side by side.
- In 2-column mode, **Description / tracklist split** sets the description column's width and **Tracklist position** decides which block sits in the left or top slot.
- It belongs to the **product** page template only.

Settings

- **Layout** — **1 column** or **2 columns** (default 1 column).
- **Tracklist position** — **Tracklist first** or **Tracklist second** (default Tracklist second: description first, then tracklist).
- **Description / tracklist split** — the description column's width in 2-column mode (default 60); the tracklist gets the remainder. It shows only with 2 columns.
- **Max width** — caps the section's width in pixels (default 1024).
- **AI description note** — the small line shown under the description of a product that is marked **Description generated by AI** in its form (up to 160 characters, in the site's language). Leave it blank to use the default: "* AI-generated description, to help you discover this item." (English site) or "* Description générée par IA, pour vous aider à découvrir cet article." (French site). Products that are not marked show no note.

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PRODUCT-DESCRIPTION

Section

Label: Description

Visibility

- [x] Visible on desktop
- [x] Visible on tablet
- [x] Visible on mobile

Layout: 1 column

Tracklist position: Tracklist second

AI description note

* Description générée par IA, pour vous a

Shown under the description of a product marked as AI-generated. Empty uses the default of the site's language.

Max width

1024 px

Leave empty for full width (100%).

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The field is empty here, so it shows the default of the site's language in grey: the demo site is a French site, hence the French sentence.

Related

- Site builder — pages, sections, theme, header and footer
- Product page — the template product pages render through
- Products — the products these sections showcase

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Recommended products

The **Recommended products** section shows the recommendations chosen for the product being viewed, as a carousel of at most 12 products.

What this section does

- Shows the product's **own recommendations**: the list kept on the product (picked by staff or proposed from the catalogue). Products that are in stock come first, a product is shown once even if it exists in several formats (the format being viewed first), no more than two products of the same artist are shown (products picked by staff are always shown), and a product that is hidden, draft or archived is never shown.
- When the product has **no recommendations yet**, the section shows the products matching its own settings below (category, search, filters). If none of them is set, it shows other products of the same category.
- When there is nothing to show, the section is not displayed on the published site; the Site Builder preview still shows it.
- It belongs to the **product** page template only. On a product page, the first displayed **Product carousel** with no filter, sort or availability set behaves the same way; any further displayed carousel with none of them set on that page shows nothing. On a page that already has a **Recommended products** section, an unconfigured carousel shows nothing.

Settings

- **Title** — optional heading above the carousel; empty means no heading.
- **Max items** — how many products are shown, from 1 to 12 (default 12). The section never shows more than 12.
- **Max width** — caps the section's width in pixels (default 1024).
- **Category**, **Search**, **Availability**, **Dynamic query** — used only when the product has no recommendations yet, as described above.
- **Card height**, **Arrow position**, the link next to the title and the optional **Text (markdown)** with its **Text position** — the same as in the **Product carousel** section.

Related

- Site builder — pages, sections, theme, header and footer
- Product page — the template product pages render through
- Product carousel — the carousel this section is built on

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- Products — the products these sections showcase

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Customers also bought

The **Customers also bought** section shows a band of products under that heading, selected by a query run against the shop's product database. It does not read what customers bought: the products are the ones its settings select.

What this section does

- **Rows** and **Max items** determine how many products are shown.
- Renders as a **grid**, using the same engine as the **Product grid** section, not a carousel.
- The seeded product page uses two **product-carousel** sections for these bands instead — both section types exist, so pick per page.
- It belongs to the **product** page template only.

Settings

- **Title** — optional heading above the grid; empty means no heading.
- **Max items** — the hard cap on how many products are shown (default 12).
- **Max width** — caps the section's width in pixels (default 1024).
- **Category** — exact match on the category taxonomy; empty means no filter.
- **Search** — case-insensitive match on the product name or artist; empty means no filter.
- **Availability** — **All products** (the default), **In stock only** or **Pre-orders only**. A pre-order has no stock; with **Pre-orders only**, the section is hidden when no pre-order is on sale.
- **Dynamic query** — one or more groups of field-equals-value conditions on Brand, Artist, Genre, Style, Tag and Category; a product matches when it satisfies every condition of at least one group; empty means no extra filter.
- **Rows** — the number of rows to fill (1–3, default 2).
- **Sort by** and **Show 'Out of stock' badge** — the same as in the Product grid section.

Related

- Site builder — pages, sections, theme, header and footer
- Product page — the template product pages render through
- Products — the products these sections showcase

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Product hero (gallery + info)

The **Product hero (gallery + info)** section combines the current product's gallery and buy-box info in a two-column band.

What this section does

- Puts the product gallery and the buy-box info on one row.
- **Height** acts as a minimum, so a short configuration never clips the info column.
- The stock wording follows the product's stock through the **Low-stock threshold**; in contexts with no stock to read, such as the mock-data preview, it falls back to a plain in-stock or out-of-stock flag.
- It belongs to the **product** page template only.

What the hero shows

The info column reads from top to bottom:

- The **artist** names above the title, each a link (see below).
- The **title**.
- The **brands** line: every brand of the product, each a link, separated by commas.
- The **short description**, as a paragraph, when the product has one. A product whose category hides the short description shows none.
- The **genre and style** labels, then the price, the stock status and the variant choices.
- Under the price, a new product that carries an eco-participation shows it apart: "incl. eco-participation €1.50" for one unit. It is part of the price, not added to it (see Products).
- The **conditions line**: the category, format, size, speed (rpm) and the condition of the selected version, separated by dots. A part the product does not have is left out. The comments of the selected version appear on their own line below it.
- The tags set to **In hero** appear as small pills at the end of the conditions line, newest first.

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- When the product cannot be bought (no stock, or a pre-order with no capacity left), a box **Get an alert** takes the place of the disabled button. A guest gives an email address and sees "Check your inbox: click the link we sent to confirm your alert." whatever the address; the alert starts when they click the link in the mail (valid 7 days). A signed-in customer joins in one click ("Done. We will email you when it is back."), or sees "You are on the list for this product." with **Remove** and **Manage my alerts**. The button reads "Notify me when it is back", or "Notify me when pre-order is available" for a pre-order. Everyone on the list gets one mail when the product can be bought again, and the alert ends. An address can have up to 20 alerts. The box never appears on product cards.

Settings

- **Image position** — Left or Right (default Left).
- **Image display** — how the image is drawn in its column: **Blurred background
  - whole image** (default), **Cropped to fill**, or **Whole image** left, centred or right over an **Image background** colour.
- **Image / info split** — the image column's width (default 50); the info column gets the remainder.
- **Height** — a minimum height so a short configuration never clips the info column (default 480).
- **Max width** — empty by default, meaning full width.
- **Low stock threshold** — controls the stock wording against the product's stock (default 5): 0 shows "Out of stock", 1 shows "Last one!", from 2 up to the threshold "Only N in stock", and above that "In stock".
- **Artist link** — **Artist page** or **Search artist**. A new shop's product hero starts on **Artist page**, and so does one you add in the Site Builder; a product hero that already existed keeps what it had (**Search artist** unless you changed it).
- **Brand link** — **Brand page** or **Search brand**, started and kept the same way.

Artist and brand links

Each artist name above the title, and each brand in the brands line below the title, is a link. Where it goes depends on **Artist link** and **Brand link**:

- **Search artist** / **Search brand** opens your catalog page showing only that artist's (label's) products. It **replaces** the visitor's current catalog filters (search text, in-stock and other filters are cleared) rather than adding to them.
- **Artist page** / **Brand page** opens the artist's (label's) own page — see the Artist page and Brand page. If those pages are switched off, or the artist is archived, the link searches the catalog instead, so it never leads to a missing page.

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- With no catalog page on the site, a search link shows as plain text.
- In the Site Builder preview of the demo product, the names show as plain text.
- **Search engines:** only **Artist page** / **Brand page** links lead them to the artist and label pages. A search link reaches them as a plain link to the catalog, because the filter is applied in the visitor's browser.

The **Product info** section shows the same names, brands, short description and conditions line, and links them with the defaults (search). It does not show the **In hero** tags.

Related

- Site builder — pages, sections, theme, header and footer
- Product page — the template product pages render through
- Products — the products these sections showcase

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Agenda entry hero (image + info)

The **Agenda entry hero (image + info)** section opens the agenda entry page with the agenda entry's image and its key information side by side.

What this section does

- A two-column band combining the agenda entry's images with its title, date and venue.
- The date shows the **end time** when the agenda entry has one: `Thursday 12 November · 19:00 – 21:00`, or both dates when it ends on another day.
- The address is a link that opens a map in a new window; the venue name stays plain text. An agenda entry with a venue only, and no street or city, shows no link.
- The number of **seats**, in a muted line under the venue, when the agenda entry has some.
- A **Book** button that opens the entry's booking link in a new tab, when it has one. Seats and the button disappear once the agenda entry has taken place.
- With several images, they take turns automatically, as in the product hero; previous/next arrows and dots let visitors browse them. They are shown in the order set on the agenda entry in the backoffice. A single image is shown without arrows or dots.
- The tags of the agenda entry (set on the tag, under **Display on site**) appear in two places:
  - the tags set to **Stamp over image** are drawn at the bottom left of the image, one above the other, the newest in the corner;
  - the tags set to **In hero** appear as small pills after the date and the venue, newest first. Each tag shows in its own colour, with black or white text so it stays readable; a tag with no colour is neutral. Tags set to **Above description** or **Not shown**, and expired tags, do not appear in the hero.
- **Agenda** page template only.

Settings

- **Image position** — Left or Right (default Left).
- **Image display** — how the image is drawn in its column: **Cropped to fill** (default), **Blurred background + whole image**, or **Whole image** left, centred or right over an **Image background** colour.
- **Image / info split** — the image column's width (default 50).
- **Height** — the band's height (default 420).
- **Max width** — caps and centres the band in pixels (empty by default = full width).

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- **Book button text** — the button's wording. Empty gives "Book" (« Réserver » on a French site).
- **Seats text** — the seats line, with `{count}` for the number, for example `{count} seats`. It is used as written for every number, including 1. Empty gives "1 seat" / "40 seats" (« 1 place » / « 40 places » on a French site).

Related

- Site builder — pages, sections, theme, header and footer
- Agenda entry page — the template agenda entry pages render through
- Agenda — the agenda entries these sections show

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Agenda entry title

The **Agenda entry title** section shows the resolved agenda entry's title on the agenda entry page.

What this section does

- A text block with the agenda entry's title.
- The content always comes from the agenda entry — never typed in the section.
- **Agenda** page template only.

Settings

- **Max width** — caps and centres the block in pixels (default 640).

Related

- Site builder — pages, sections, theme, header and footer
- Agenda entry page — the template agenda entry pages render through
- Agenda — the agenda entries these sections show

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Agenda entry description

The **Agenda entry description** section shows the resolved agenda entry's description on the agenda entry page.

What this section does

- A text block with the agenda entry's description.
- The content always comes from the agenda entry — never typed in the section.
- The tags of the agenda entry set to **Above description** appear as a row of small badges above the text, newest first, each in its own colour (neutral for a tag with no colour). The row shows even when the agenda entry has no description.
- **Agenda** page template only.

Settings

- **Max width** — caps and centres the block in pixels (default 720).

Related

- Site builder — pages, sections, theme, header and footer
- Agenda entry page — the template agenda entry pages render through
- Agenda — the agenda entries these sections show

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Agenda entry date

The **Agenda entry date** section shows the resolved agenda entry's date on the agenda entry page.

What this section does

- A text block with the agenda entry's date.
- The content always comes from the agenda entry — never typed in the section.
- The date and time are shown in the site's language and the shop's time zone (Europe/Paris) on a 24-hour clock, for example "Sunday 1 November · 13:00"; every visitor sees the same hour wherever they are.
- **Agenda** page template only.

Settings

- **Max width** — caps and centres the block in pixels (default 640).

Related

- Site builder — pages, sections, theme, header and footer
- Agenda entry page — the template agenda entry pages render through
- Agenda — the agenda entries these sections show

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Agenda entry gallery

The **Agenda entry gallery** section shows the agenda entry's image gallery on the agenda entry page.

What this section does

- The agenda entry's image gallery, in a square aspect.
- The images always come from the agenda entry — never typed in the section.
- **Agenda** page template only.

Settings

- **Max width** — caps and centres the gallery in pixels (default 1024).

Related

- Site builder — pages, sections, theme, header and footer
- Agenda entry page — the template agenda entry pages render through
- Agenda — the agenda entries these sections show

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Agenda entry location

The **Agenda entry location** section shows the resolved agenda entry's venue on the agenda entry page.

What this section does

- A text block with the agenda entry's venue.
- The content always comes from the agenda entry — never typed in the section.
- **Agenda** page template only.

Settings

- **Max width** — caps and centres the block in pixels (default 640).

Related

- Site builder — pages, sections, theme, header and footer
- Agenda entry page — the template agenda entry pages render through
- Agenda — the agenda entries these sections show

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Agenda entry location map

The **Agenda entry location map** section shows a fixed-height map of the agenda entry's venue on the agenda entry page.

What this section does

- A map of the venue, on its own, at a fixed height.
- **Agenda** page template only.

Settings

- **Max width** — caps and centres the map in pixels (default 720).
- **Height** — the map's height (default 320).

Related

- Site builder — pages, sections, theme, header and footer
- Agenda entry page — the template agenda entry pages render through
- Agenda — the agenda entries these sections show

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Agenda entry location + map

The **Agenda entry location + map** section shows the agenda entry's venue together with its map on the agenda entry page.

What this section does

- The venue's location text together with the map.
- **Agenda** page template only.

Settings

- **Max width** — caps and centres the block in pixels (default 720).
- **Height** — the map's height (default 320).

Related

- Site builder — pages, sections, theme, header and footer
- Agenda entry page — the template agenda entry pages render through
- Agenda — the agenda entries these sections show

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Artist hero (image + biography)

The **Artist hero (image + biography)** section opens the Artist page with the artist's name, image and biography.

What this section does

- A two-column band: the artist's images on one side, its name and biography on the other.
- With several images, they take turns automatically, as in the product hero; previous/next arrows and dots let visitors browse them. They are shown in the order set on the artist in the backoffice. A single image is shown without arrows or dots.
- With no image, the band shows the name and biography alone, centred.
- A long biography makes the band taller; it is never cut off.
- **Artist** page template only.

Settings

- **Image position** — Left or Right (default Left).
- **Image display** — how the image is drawn in its column: **Blurred background
  - whole image** (default), **Cropped to fill**, or **Whole image** left, centred or right over an **Image background** colour.
- **Minimum height** — the band's minimum height (default 420).
- **Image / text split** — the image column's width (default 50%).
- **Max width** — caps and centres the band in pixels (empty by default = full width).
- **AI description note** — the small line shown under the biography of an artist that is marked **Description generated by AI** in its form (up to 160 characters, in the site's language). Leave it blank to use the default: "* AI-generated description, to help you discover this artist." (English site) or "* Description générée par IA, pour vous aider à découvrir cet artiste." (French site). Artists that are not marked show no note. The flag is set when the text is generated by AI, including when the Discogs import completes it, and you can tick or untick it in the artist's form.

These settings are the Artist page's own: the brand hero is configured separately.

Images and texts you publish

- The images and biography shown are the ones entered for the artist in the backoffice, including those imported from Discogs or other sources.

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- Publishing them on your storefront is your responsibility: make sure you may use them (licences, and the right to the image of an identifiable person). ShopForge performs no rights check and shows no source credit.
- To correct an image or a text, edit the artist; to stop showing an artist's page, archive the artist (see the Artist page).

Related

- Artist page — the template this section belongs to
- Product carousel (1 row) — the artist's products below the hero

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Brand hero (image + description)

The **Brand hero (image + description)** section opens the Brand page with the brand's name, image and description.

What this section does

- A two-column band: the brand's images on one side, its name and description on the other.
- With several images, they take turns automatically, as in the product hero; previous/next arrows and dots let visitors browse them. They are shown in the order set on the brand in the backoffice. A single image is shown without arrows or dots.
- With no image, the band shows the name and description alone, centred.
- A long description makes the band taller; it is never cut off.
- **Brand** page template only.

Settings

- **Image position** — Left or Right (default Left).
- **Image display** — how the image is drawn in its column: **Blurred background
  - whole image** (default), **Cropped to fill**, or **Whole image** left, centred or right over an **Image background** colour.
- **Minimum height** — the band's minimum height (default 420).
- **Image / text split** — the image column's width (default 50%).
- **Max width** — caps and centres the band in pixels (empty by default = full width).
- **AI description note** — the small line shown under the description of a label that is marked **Description generated by AI** in its form (up to 160 characters, in the site's language). Leave it blank to use the default: "* AI-generated description, to help you discover this label." (English site) or "* Description générée par IA, pour vous aider à découvrir ce label." (French site). Labels that are not marked show no note. The flag is set when the text is generated by AI, including when the Discogs import completes it, and you can tick or untick it in the label's form.

These settings are the Brand page's own: the artist hero is configured separately.

Images and texts you publish

- The images and description shown are the ones entered for the brand in the backoffice, including those imported from Discogs or other sources.

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- Publishing them on your storefront is your responsibility: make sure you may use them (licences, and the right to the image of an identifiable person). ShopForge performs no rights check and shows no source credit.
- To correct an image or a text, edit the brand; to stop showing a brand's page, archive the brand (see the Brand page).

Related

- Brand page — the template this section belongs to
- Product carousel (1 row) — the brand's products below the hero

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Account dashboard

The **Account dashboard** section is the customer's own dashboard: order history, cart, wishlist, contact info, delivery addresses and store credit. It is a fixed layout, not something you compose from scratch.

What this section does

- Gives each customer their dashboard: order history, cart, wishlist, contact info, delivery addresses and store credit.
- The layout is fixed — you do not compose it from separate blocks.
- Lives on the **account** page, which customers reach by signing in, not by browsing the navigation.
- Account dashboard sections can be placed on the **account** page only.

My alerts

A signed-in customer has a **My alerts** tab: the products they asked to be told about when they can be bought again. Each alert is a line like a basket line: the picture, the artist or brand, the title (a link to the product), the category, format and condition, then on the right the status ("Waiting for restock" or "Waiting for pre-order"), "Kept until {date}" and **Remove**. Under the list a note says a customer can register for up to 20 alerts; with none, the tab says "You have no alerts. Use “Notify me” on a sold-out product page to add one." The customer gets one mail per alert, and the alert ends with it. The link in the confirmation mail opens a page "Your alert is confirmed" with the way back to the product, or "This link has expired" after 7 days; the unsubscribe link in an alert mail opens "Alert removed." and ends that alert only.

Invoices of an order

Each order in the order history shows its invoice and credit notes, with **Download**. An order whose invoice is on request (a consumer in France, an export, an order of only second-hand goods: see Invoices) shows **Request invoice** once it has shipped, or for a pickup order once it is ready or collected. Until then it says *You can request an invoice once the order ships, or for a pickup order once it is ready or collected.* One click issues the invoice and shows it in place of the button.

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Business customers

In the **My information** tab, a customer who buys for a company turns on **Business customer** and fills in the company name, the SIREN or SIRET (both required) and, if they have one, the VAT number. A company billed outside France gives its company name and its VAT number (required) and no SIREN or SIRET. Turning it off clears them. The checkout then offers these details already filled in.

Creating an account

On the **Login** tab, **Create account** asks for the password twice: **Password** and **Confirm password**. Under the fields the page states the rules (8 to 72 characters, with an uppercase letter, a lowercase letter, a digit and a special character) and names the first one the password still breaks as the customer types. Once the confirmation has text, a line says whether the two match. While a rule fails or the two differ, nothing is sent and the cursor goes to the field to fix; the customer's entries stay in place. A password that appears in known data breaches is refused with its own message.

After five wrong passwords for an account in 15 minutes, the **Login** tab refuses that account's sign-in, even with the right password, until the time it shows ("Too many failed sign-in attempts. Try again after 11:45."), in the customer's local time.

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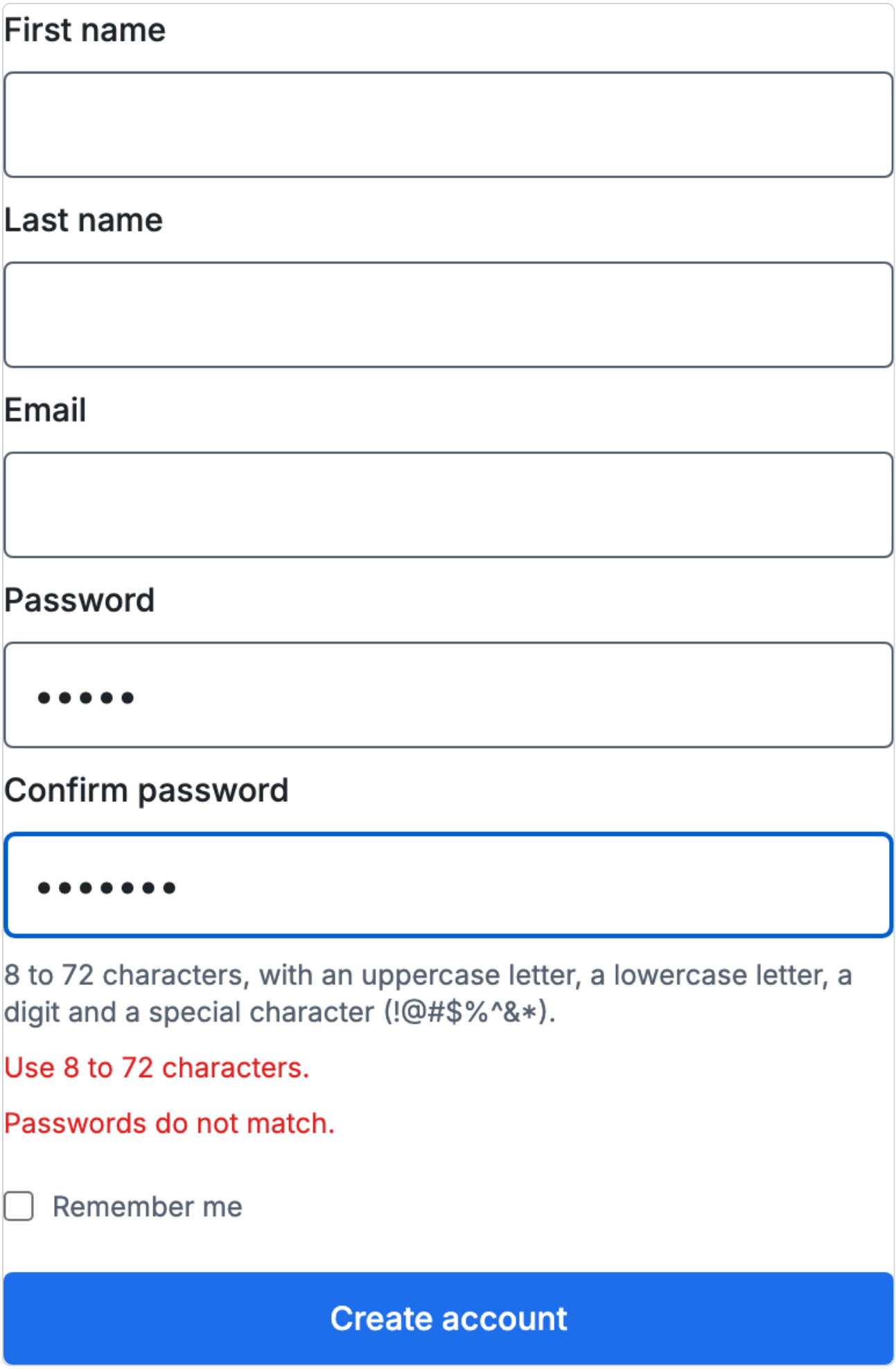
First name
Last name
Email
Password
Confirm password
8 to 72 characters, with an uppercase letter, a lowercase letter, a digit and a special character (!@#$%^&*).
Use 8 to 72 characters.
Passwords do not match.
Remember me
Create account

Memberships

A customer who holds memberships sees them in the **My information** tab, under **Memberships**: one line per membership that has not ended, "Friends of the shop: from 19 Nov 2026 to 18 Nov 2027" (the end is the last day held), or "Friends of the shop: starts on 5 Dec 2026" before it starts. A membership bought online starts once the 14-day withdrawal period is over, and the cart says so under its line: "Starts on 5 Dec 2026, after the 14-day withdrawal period." See Memberships.

Changing the password

A signed-in customer changes their password in the **My information** tab, in the **Password** block: **Current password**, **New password** and **Confirm password**, then **Change password**. The block shows the same rules as account creation, as the customer types. A wrong current password reads "The current password is wrong." and the new-password fields stay filled. When the change succeeds, every session is closed: the customer is signed out and lands on the **Login** tab with "Password changed. Sign in with your new password." The password-reset page, reached from the e-mailed link, shows the same rules and checks the confirmation as the customer types.

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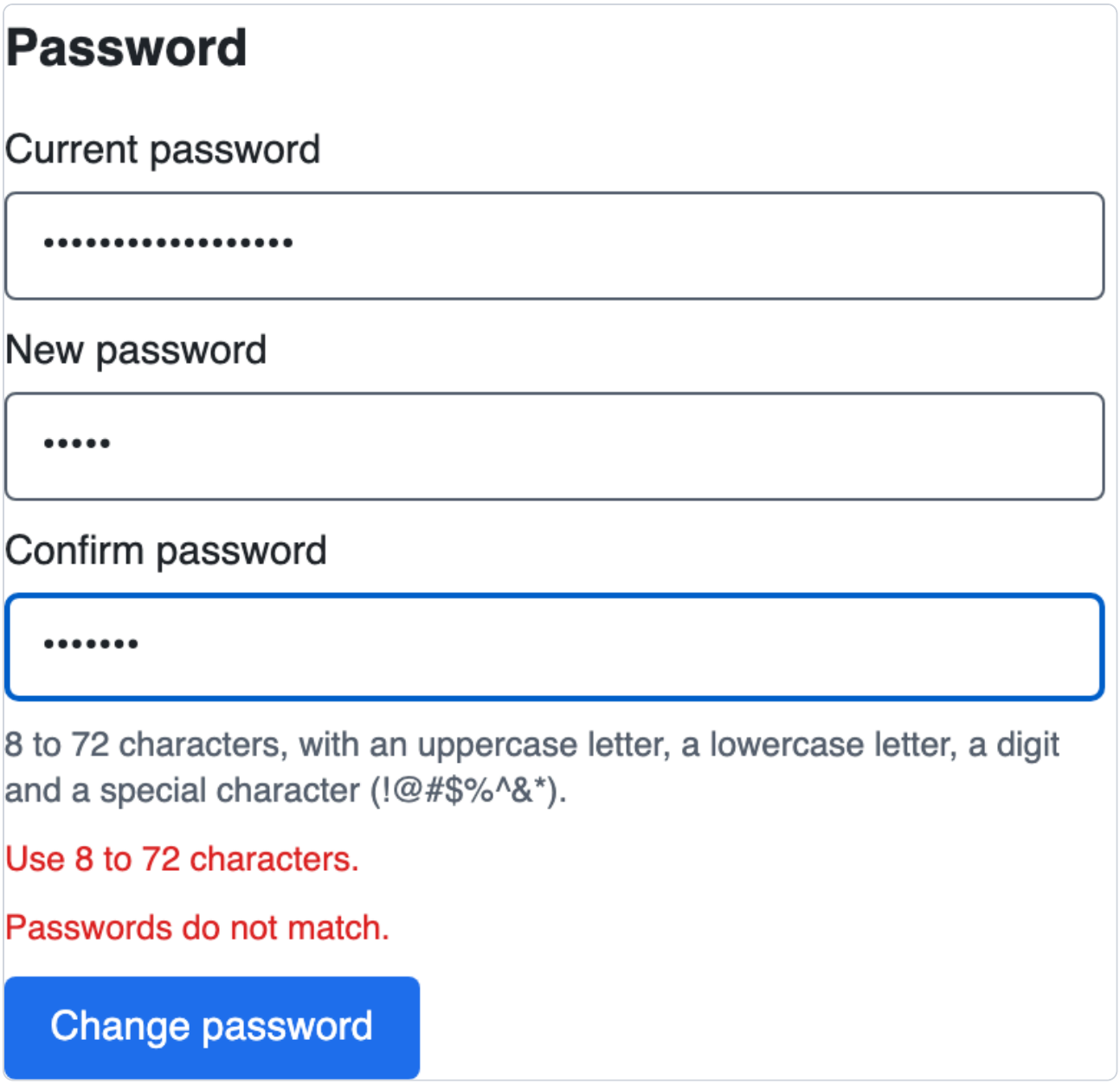

Settings

- **Max width** — caps and centres the section in pixels (default 1024).
- **Default country for new addresses** — pre-fills the country field of the customer's "Add address" form; empty by default.
- **Link to the terms of sale** — where the checkout's "accept terms" checkbox links: a path on your site (default `/cgv`) or the full address of terms hosted elsewhere.
- **Delivery delay message** — plain text shown above the delivery methods at checkout, in the site's language; empty hides it. It is not shown for store pickup.
- **Home delivery message** and **Store pick-up message** — optional plain text shown below that checkout option, in the site's language; empty hides it.

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Related

- Site builder — pages, sections, theme, header and footer
- Account page — the customer dashboard page
- Sign in and manage your session — how customers reach their account

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Users

Users covers the people allowed to work in the backoffice of your shop and the clients that created a profile in front office. You can open it from **Configure → Users**.

Users syncs to your local database just like other modules, so you can work offline. When online, changes sync back to the backend.

How roles work

Users are divided into three types:

Backoffice staff:

- **Employees** can run the shop: products, sales (POS), orders, agenda entries, articles, the newsletter, tags and the site builder. They can only create and manage **Customer** user accounts - but cannot modify store credit entries or create/edit backoffice staff (other Employees or Administrators).
- **Administrators** additionally see the **Configure** tabs restricted to them (Integrations, Locations, Schema, Fiscal, Emails, System) and are the only ones who can publish the site. Administrators can create and manage all user types: Employees, Administrators, and Clients, including full store credit management.

Restricted tabs are visibly disabled, with the notice "Only an administrator can access this".

Customers:

- **Customers** are the people who created an account in your frontoffice shop. They have access to their order history, saved addresses and newsletter preferences, but cannot access the backoffice. Client accounts are created when a customer signs up or completes their first online purchase.

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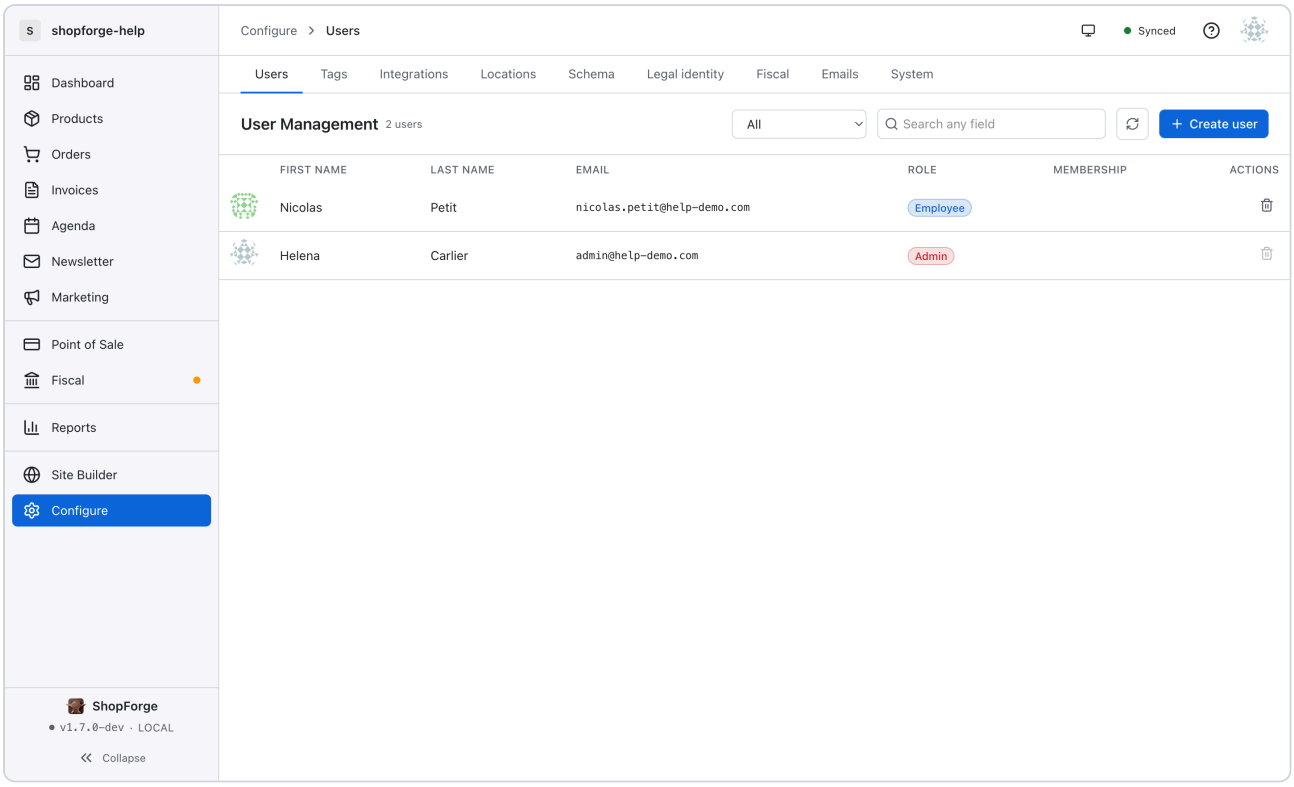
The users list



The **Users** tab offers **Create user**, a search box (**Search any field**) and **Refresh user list**. Columns: First name, Last name, Email, Role and Membership.

The **Filter by role or membership** selector narrows the list to **Staff** (**Admins**, **Employees**), **Customers** (**Non-members**) or **Members**, staff included, and one level at a time (see Memberships). The **Membership** column shows a user's running memberships and when the first one ends.

A customer who is a business shows a **Business** badge in the list.

Click a row to open the editor (see Edit a user), or use the row's delete action (with confirmation) to remove a user. Deleting a user removes them for good: wherever the history named them (the order history, the register's session history, the JET Journal, the closing sheet and the cash drawer sheet), it shows **Former employee** instead of a name.

Edit a user: one Save

Click a row to open the editor. Besides the profile fields (first name, last name, email, role, newsletter, and the business customer switch of a customer), it holds the user's **addresses**, as tabs, and their **Store credit**. One **Save** writes all of it.

- **Nothing is written before Save.** A change to a profile field, an address or a store credit entry stays in the form. Only **Send a new code** and **Set a new password** (see below) act at once.

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- **Save turns on** as soon as anything changed, in the profile, an address or the store credit. The footer says what Save will write: "1 unsaved change." or "{n} unsaved changes."
- **Addresses.** Edit a tab in place, or use **+ Address** for a new one. **Delete** does not delete at once: the tab stays, marked **(Removed)**, with **Undo**, until you save. A new address you remove before saving just disappears (its button reads **Cancel** on a new one).
- **Store credit.** Type a new amount in an entry, use **+ Add** for a new entry, or the bin to remove one. A removed entry is struck through with **Undo** until you save. Only administrators can change store credit. An amount you change several times is one change; an entry you change and then remove is one removal.
- **What Save does.** It first checks the form. A missing profile field, an address without a required field (its tab opens and the field is named, for example "City is required.") or an amount that is not an amount ("Enter an amount, for example 25.00.") stops it, and nothing is written. A new store credit entry left at 0 is not created. Then it writes, one after another: the profile; the addresses (removals, then changes, then new ones); the store credit (changes, then removals, then new entries). Each store credit change is recorded as its own operation, exactly as before; they are only sent at Save.
- **When everything is written**, the window closes and "User updated" shows.
- **When one write fails**, the window stays open and says what happened: "Not saved: {part}: {reason}. Saved: {parts}. Not tried: {parts}." (a sentence with nothing in it is left out). The saved parts are done; what is left keeps what you typed, and **Save** is still on. Click it again after fixing the cause: it sends only what is left, never what was already written.
- **Closing with unsaved changes. Cancel**, the **×** and `Esc` ask "Discard the changes?" with **Keep editing** and **Discard**. `Esc` or a click outside the question means Keep editing. After a partial failure, only what is still unsaved counts. With nothing changed the window closes at once.

Create an user

Fields:

- **First name** (required), **Last name** (required) and **Email** (required).
- **Role** — Admin, Employee or Customer.
- **Password** (required) and **Confirm password** — 8 to 72 characters, with an uppercase letter, a lowercase letter, a digit and a special character (!@#$%^&*), and not containing the user's email address; passwords known in data breaches are also rejected. **Generate password** fills both fields with a compliant 16-character password.

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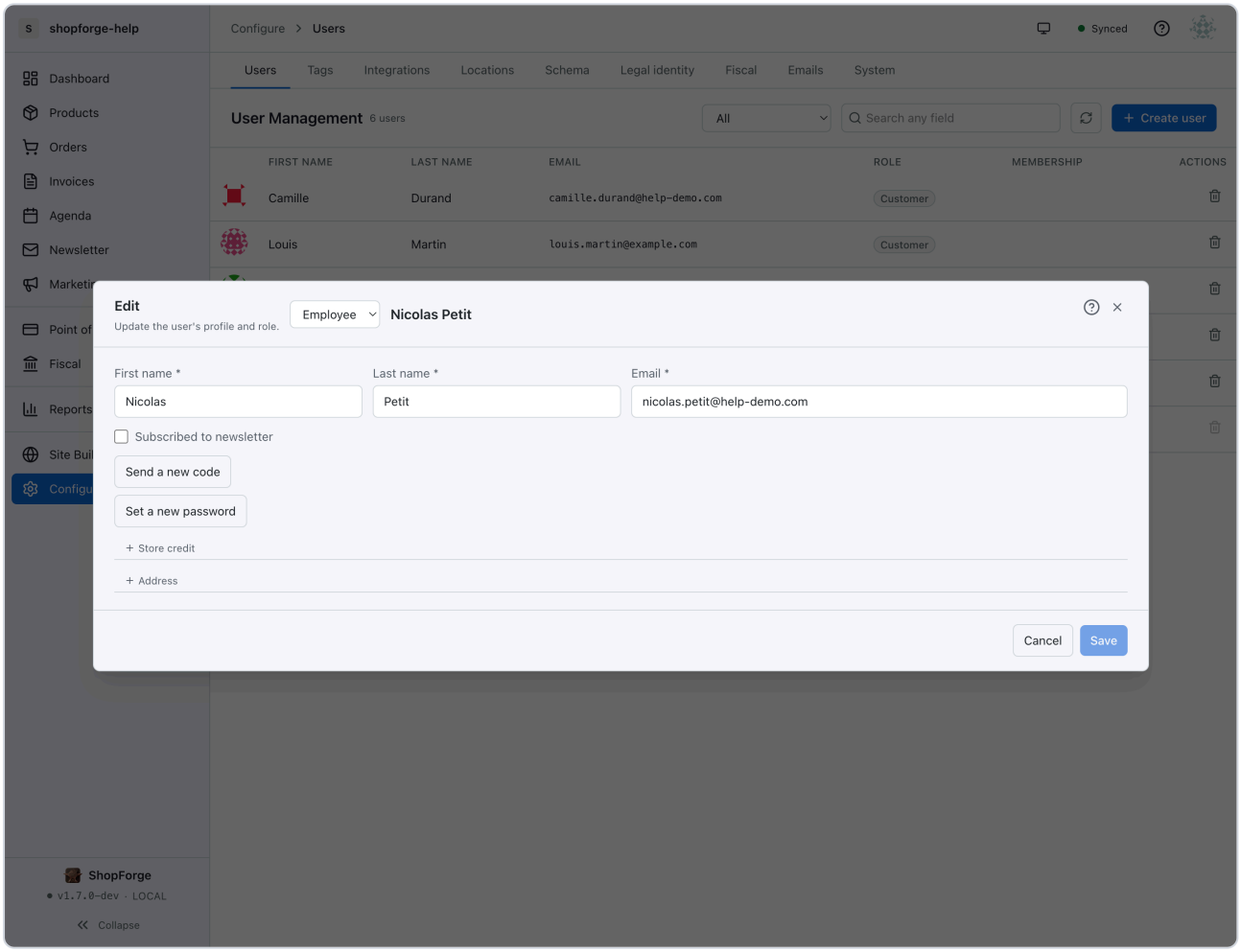
The welcome code and Send a new code

When you create an employee or an administrator, they receive a welcome e-mail with a **code**, not a link: it works even if your shop has not published its website. They open the back office, click **I have a code** on the sign-in screen, type the code and choose their password (see You received a code). The code is valid 7 days and works once. If you chose **Generate password** or typed a password for them, you do not need to tell it: they set their own with the code.

If the e-mail is lost or the code has expired, open the user from **Configure → Users** and click **Send a new code**. You see "A new code was sent to {email}." The new code replaces the earlier one and is valid 7 days. The action is shown only to an administrator, on an employee or an administrator, and needs a connection to the server: offline, you see "Sending a code needs a connection to the server. Try again once you are back online." Customers do not get a code; they use the shop's website.



Set a new password for a staff member

If an employee or an administrator forgets their password, an administrator can set a new one. Open the user from **Configure → Users** and click **Set a new password**. The action is shown only to an administrator, and only on an employee or an administrator other than yourself: it is not

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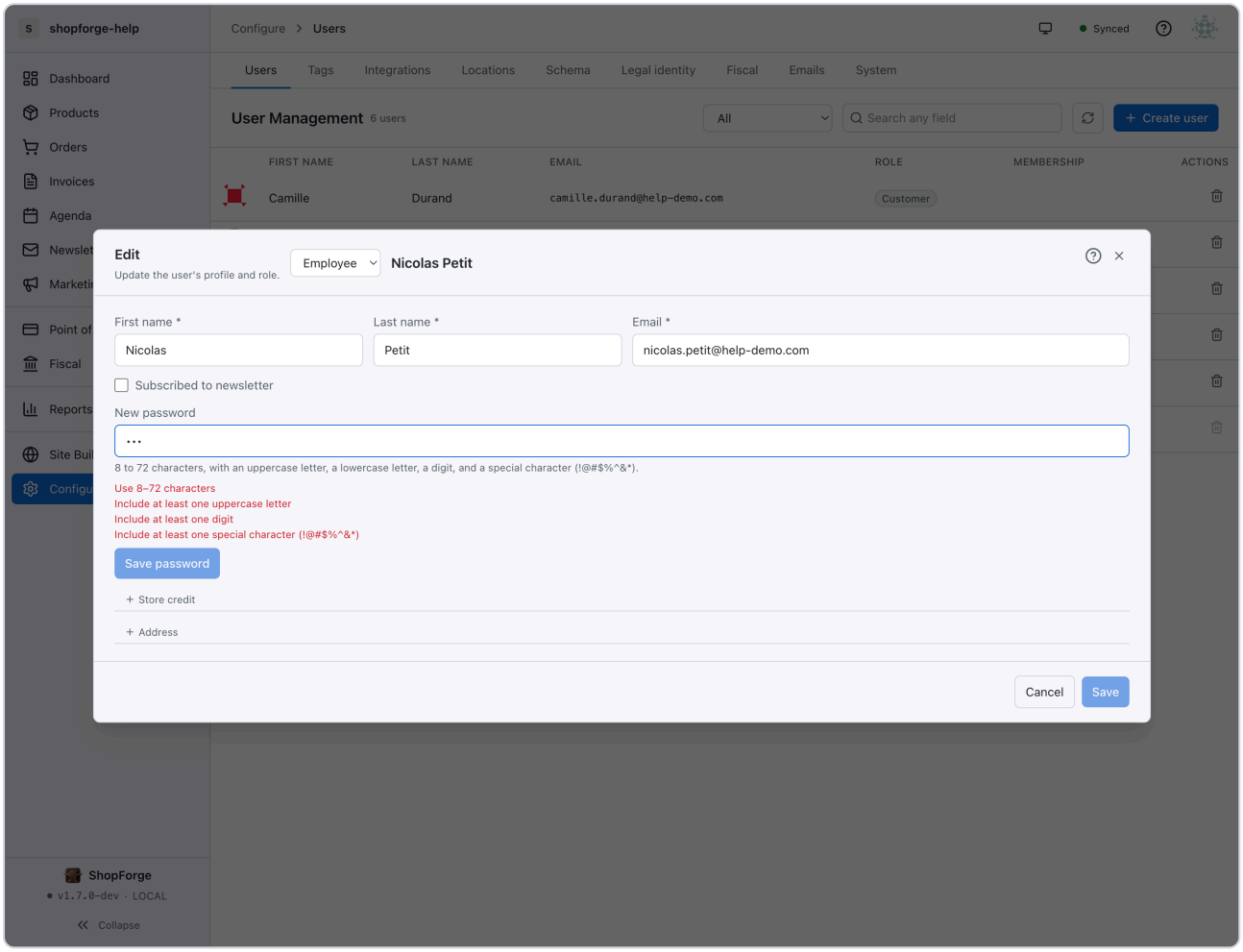
shown to an employee, on a customer, or on your own record (change your own from **My profile**).



1. Type the **New password**. The hint under the field gives the rules: 8 to 72 characters, with an uppercase letter, a lowercase letter, a digit and a special character (!@#$%^&*), and not containing the user's email address. Anything missing is listed in red, and a password known in data breaches is refused.
2. Click **Save password**. You see "Password changed. This user is signed out everywhere." The user signs in again with the new password, on the back office and on the registers. You never see their old password.

This needs a connection to the server. Offline, you see "Setting a password needs a connection to the server. Try again once you are back online."

My PIN

Every member of staff, employee or administrator, can set a 6-digit PIN of their own: user menu → **My PIN**. Its right edge reads **Set** or **Not set**.

1. Type the **New PIN** and **Confirm PIN**, and your **Current password**.
2. Click **Save PIN**. **Remove my PIN** clears it, with the same password check.

A PIN that is too easy to guess is refused: six times the same digit, a run such as 123456 or 987654, or one of the most common PINs (such as 121212). The dialog says so as soon as you have typed it: "This PIN is too easy to guess: avoid repeated digits, runs like 123456 and common PINs."

Checking a PIN is made deliberately slow, so that nobody can try every PIN on a copy of a computer's data: it takes a few seconds. While it runs, the screen shows a spinner ("Checking your PIN...") and takes no other PIN. If the check can't run, it says "The PIN couldn't be checked on this computer. Try again.": that doesn't count as a wrong PIN.

Saving needs a connection; every computer of the shop receives the PIN at its next sync, and from then on it works offline. Only a secure hash of it is stored, never the PIN itself.

A change to or from the administrator role removes your PIN, in the same change: set it again if you want one. An administrator's PIN approves every action on the registers; an employee's PIN only unlocks the screen, except for a refund, a cancellation and a manual discount, which any staff member approves (see Unlock the screen).

What it does depends on your role, and the dialog says so:

- **Employee:** the PIN **only unlocks the screen** when it is locked, also offline (see Unlock the screen). It approves nothing but a refund, a cancellation or a manual discount above the threshold; for every other action an employee's PIN is refused as a manager's approval, whatever the computer holds.
- **Administrator:** the same PIN also **approves** every action on the registers, also offline (see Point of sale — manager approval).

Business customers

On a customer, the **Business customer** switch marks a company. Turn it on to fill in the **Company name** and the **SIREN or SIRET**, both required, and the **VAT number**, which is optional. Turn it off and save to clear all three. There is no other flag: a customer is a business as long as a SIREN or SIRET is kept. The checkout, a back office order and the till invoice form start from these details when the customer is attached, and you can still change them there; an order or invoice already made never changes. For a business customer, the billing address chosen at checkout, on a back office order or for a till invoice is labelled **Company billing address**.

User profile and preferences

All users (staff and clients) can manage certain settings from **My profile** in the user menu:

- **Name and email** — editable by the user.
- **Newsletter subscription** — opt in or out of receiving the shop's newsletter.
- **Delivery addresses** — save multiple delivery addresses for checkout and order defaults.

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- **Store credit** — balance is always visible; only administrators can grant, modify or revoke credit entries.
- **Memberships** — on a customer's profile, the memberships they hold (tier, discount, period, status). Administrators can **Grant a membership** from here; see Memberships.
- **Preferences** (language, date format, timezone, theme) are not in My profile: each person sets them from the user menu → **Preferences** (see Your preferences); administrators set the tenant defaults in **Configure → System**.

Related

- Lock the screen — when the screen locks and how a PIN, a password or an administrator unlocks it
- Memberships — tiers, granting a membership and the members filter
- My profile — what users can edit in their own account (name, email, newsletter, addresses, store credit for admins)
- Your preferences — personal language, date format, timezone and theme

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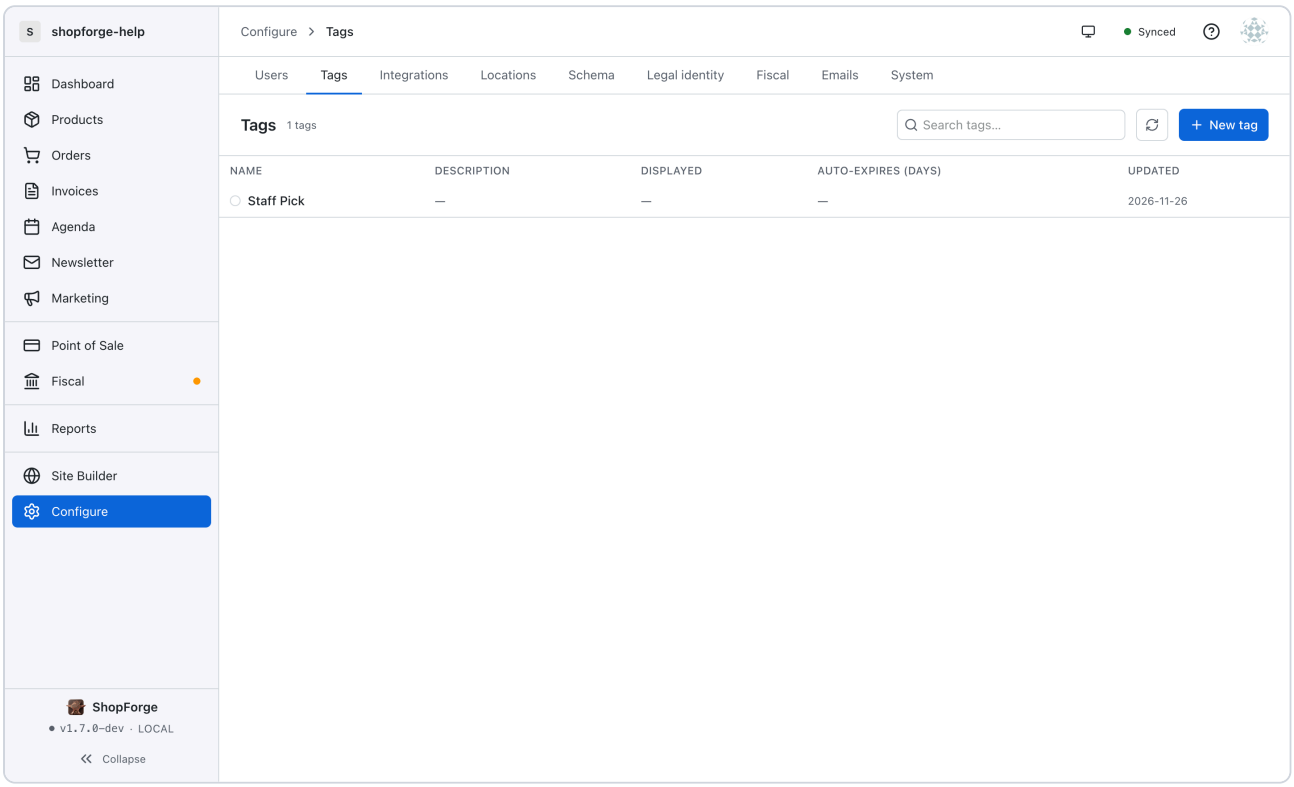
Tags

Tags are reusable labels you can apply to products, brands, artists and agenda entries — to organise content and power filters across the shop and front-office site. You manage them from **Configure → Tags**.

Tags follow the same offline-first model as products: the list runs against the **local copy**, and changes are queued and synced in the background.

The tags list



The **Tags** tab offers **New tag**, **Search tags…** and **Refresh**. Columns: Name, Description, **Displayed**, **Auto-expires (days)** and Updated.

The **Displayed** column shows where a tag surfaces on the storefront: **Not shown**, **In hero**, **Above description** or **Stamp over image**. Click a row to edit the tag.

Create or edit a tag

The editor covers:

- **Name** (required) and **Slug** (required) — the unique identifier used by filters.
- **Color** — a hex colour (for example `#FF5733`) used for the tag chip in the backoffice.
- **Description** — optional.

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- **Auto-expire after (days)** — blank (or **Never**) keeps the tag indefinitely; a number removes it automatically once applied for that many days.
- **Display on site** — where the tag appears on the storefront: Not shown (default value), In hero, Above description or Stamp over image. On a product page, In hero shows the tag as a pill at the end of the product's conditions line; on an agenda entry page it stays a badge in the agenda entry hero.

At the bottom, **Applied to** shows how many products, brands, artists, and agenda entries currently use the tag.

Using tags

Wherever a tags field appears (on the product, brand, artist and agenda entry forms), pick existing tags from the list or type a new name and choose **Create "{name}"** to add it on the fly.

When filtering a list by several tags, any selected tag qualifies — the results show "items matching any of these tags".

On the product, brand, artist and agenda entry lists, each selected tag shows as a chip in a row under the list title. Remove one with its **×**, or use **Clear all** (shown when two or more tags are selected). The cursor then returns to the **Filter by tag…** box.

Deleting a tag

Deleting warns that the tag "will be removed from all tagged objects": the tag is stripped from every product, brand, artist and agenda entry it was applied to.

Related

- Products — a tags field on the product form
- Agenda — tag and filter agenda entries

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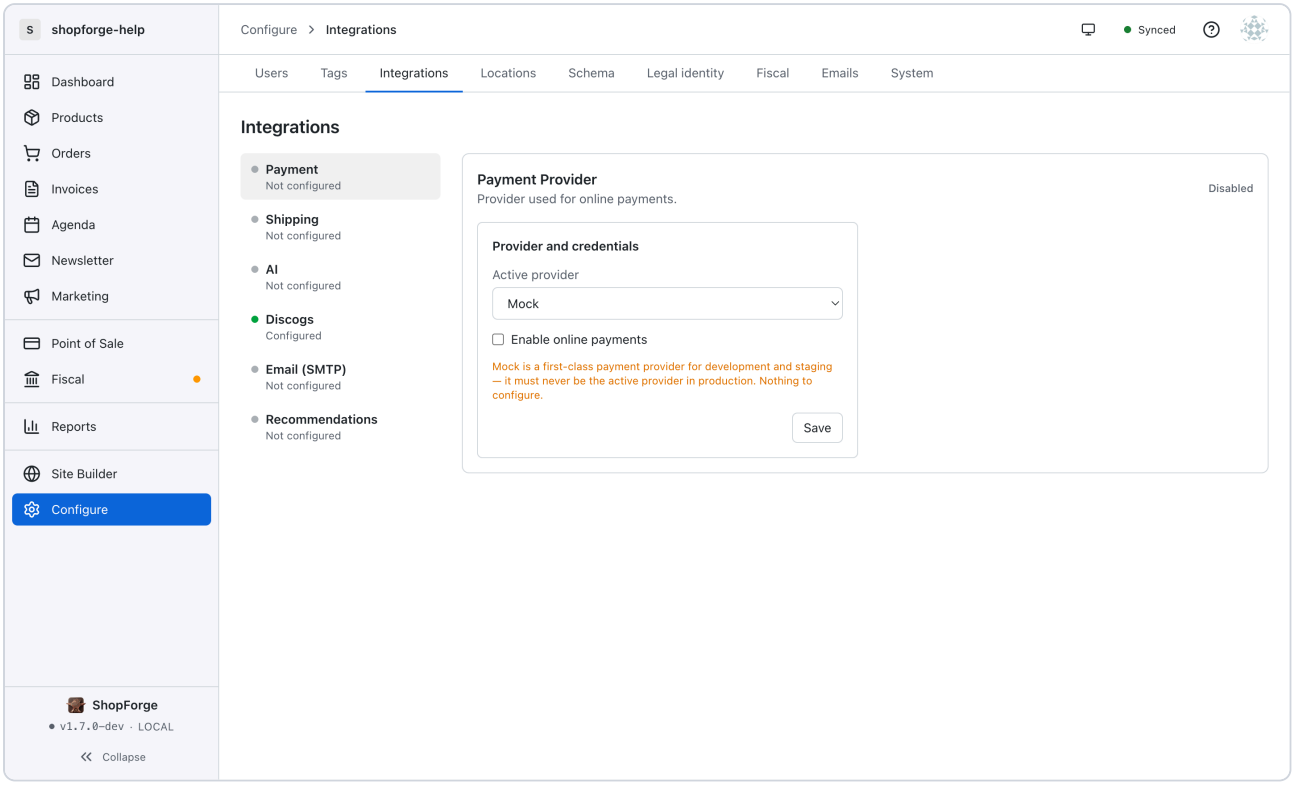
Integrations



Integrations (Configure → Integrations, administrators only) holds the credentials for the external services your shop uses and the settings that go with them.

The Integrations page

The page has one tab per service, listed on the left: **Payment**, **Shipping**, **AI**, **Discogs**, **Email (SMTP)** and **Recommendations**. Under each name the tab shows the provider in use, or **Not configured**. The dot before the name is green when the service is configured and enabled, amber when it is configured but disabled (or, for shipping, in test mode), and grey when it is not configured.

Each tab saves on its own, and the page is read from the server every time you open it. What you have typed in a tab is kept when you switch to another tab, but it is not saved until you press that tab's own button.

How credentials are entered and shown back. A secret (API key, client secret, password, token) is never shown again by the app once saved. Where one is stored the field reads **Saved** with a **Replace** button; **Replace** opens an empty field. What the page does show back is a hint, such as **Key ending in {hint}**, or non-secret values like the PayPal Client ID, the SendCloud public key or the SMTP host and From address. The one exception is the AI key, which is also kept on the computer you saved it from (see AI).

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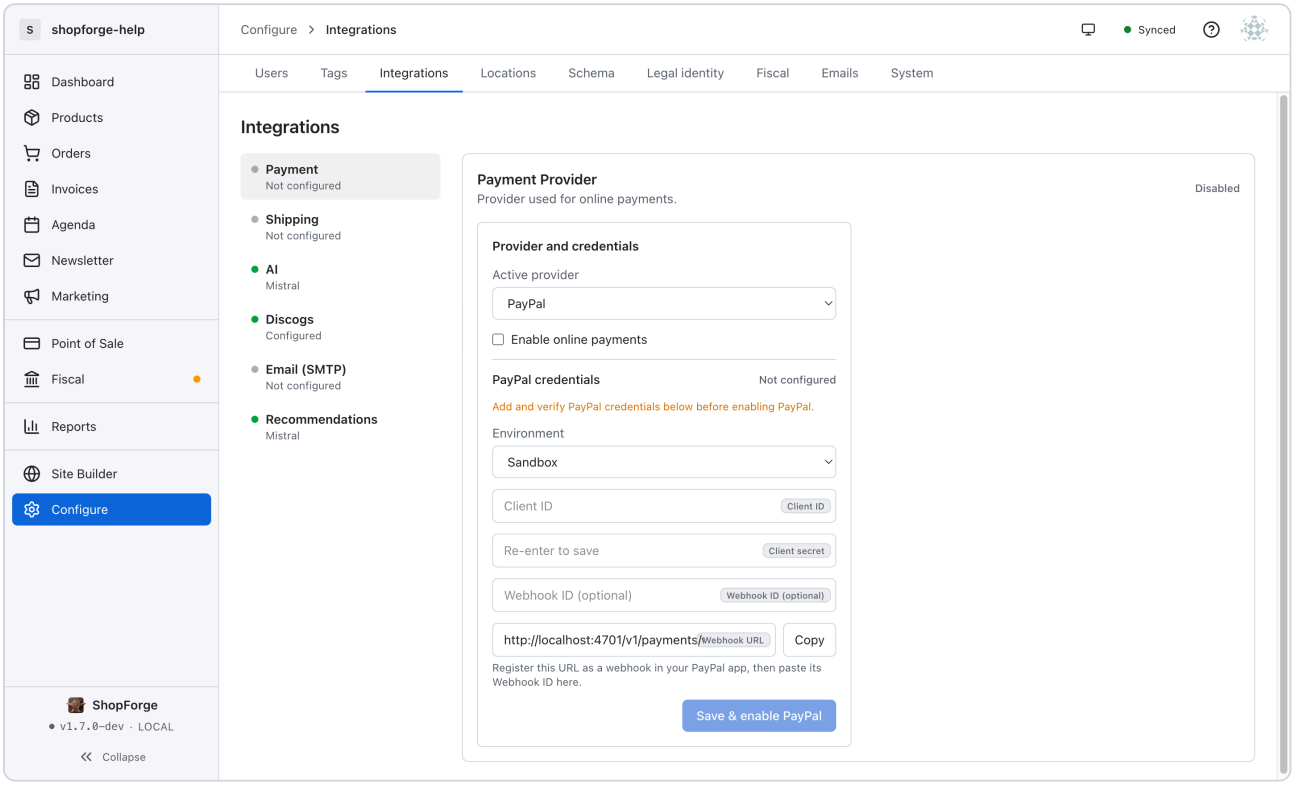
The common buttons. Once an integration is configured it shows its state (**Configured**, **Last verified: {date}** or **Last updated: {date}**) and:

- **Test connection**, where the integration has one, which checks the stored credentials ("Connection verified" or "Connection test failed").
- **Remove**. The first click turns the button into a second **Remove**; the credentials are deleted only when you click that one. Features that depend on the integration stop working until new credentials are saved.
- **Save credentials**, when the form is for entering credentials.

Payment provider



Configure → Integrations → Payment. The **Payment** tab sets the service that takes online payments. Its status reads **Enabled** or **Disabled**.

Provider and credentials. Until a provider is saved, choose the **Active provider** (**Mock** or **PayPal**) and tick **Enable online payments**. Once saved, this block shows **Active provider: …**, **Status: …** and **Last updated: …**, with **Remove**.

- **Mock** needs nothing: it is "a first-class payment provider for development and staging — it must never be the active provider in production. Nothing to configure." Press **Save** to activate it.
- **PayPal** takes its credentials in the block below, described next.

PayPal credentials

Shown while PayPal is the chosen provider. Before PayPal is configured the page says "Add and verify PayPal credentials below before enabling PayPal." and asks for:

- **Environment**: **Sandbox** or **Live**.
- **Client ID**.
- **Client secret** (password field, placeholder "Re-enter to save").
- **Webhook ID (optional)**.
- **Webhook URL**, read-only, with a **Copy** button ("Webhook URL copied") and the hint "Register this URL as a webhook in your PayPal app, then paste its Webhook ID here." It is the address PayPal calls, and it is specific to your shop.

Save & enable PayPal stores the credentials, verifies them ("Credentials saved and verified") and makes PayPal the active provider, enabled or not according to the **Enable online payments** box. It stays greyed until the Client ID and the secret are filled.

Once saved, the block shows **Configured · {environment}**, the environment, the Client ID, **Webhook: Configured / Not configured** and the date, with **Test connection** and **Remove**, and the **Webhook URL** with its **Copy** button, to copy it again. The client secret reads **Saved**; use **Replace** to type a new one and **Save** it (environment and Client ID are kept). If the credentials were saved but PayPal never became the active provider, **Set as active provider** appears.

Register the webhook at PayPal. Without it, a buyer's approval by QR code online, refunds made in PayPal and disputes reach ShopForge only through reconciliation.

1. Press **Copy** next to **Webhook URL**. The address is your shop's own and differs from one shop to another.
2. In your app in PayPal's developer dashboard, add a webhook, paste the URL and subscribe it to these events:
   - `CHECKOUT.ORDER.APPROVED`
   - `CHECKOUT.PAYMENT-APPROVAL.REVERSED`
   - `PAYMENT.CAPTURE.COMPLETED`
   - `PAYMENT.CAPTURE.PENDING`
   - `PAYMENT.CAPTURE.DENIED`
   - `PAYMENT.CAPTURE.DECLINED`
   - `PAYMENT.CAPTURE.REFUNDED`
   - `PAYMENT.CAPTURE.REVERSED`
   - `CUSTOMER.DISPUTE.CREATED`
   - `CUSTOMER.DISPUTE.RESOLVED`

   The last one matters: a dispute's resolution reaches ShopForge only through it, so without it an order stays **Disputed** and its refunds stay paused after PayPal has closed the dispute.

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3. Copy the **Webhook ID** PayPal gives it and paste it into **Webhook ID** in the credentials form, then press **Save & enable PayPal**. Once the credentials are saved that field is no longer shown: to add or change the Webhook ID, **Remove** the credentials and save them again.

How PayPal behaves

Once PayPal is configured and active, a second block holds PayPal's own settings. They are not credentials: each is saved on its own, without re-entering the client secret.

- **Data sent to PayPal with each order**, saved with **Save**:
  - **Buyer data**: **Standard — name, email, delivery and billing address** (the default) means the buyer finds their details already filled in on PayPal, and PayPal's record of the order holds the address a dispute is answered with. **None — amounts and items only (rollback)** is for getting past a problem with the address being sent, and it has a cost: PayPal then uses the address saved in the buyer's own PayPal account, which may differ from the delivery address, and with nothing sent to compare, the order is not marked **Address differs at PayPal**. Seller Protection only covers delivery to PayPal's address, and on a click-and-collect order PayPal may ask the buyer for a delivery address. Switch back once the problem is solved.
  - **Contact details on PayPal**: **Keep the details from the shop (recommended)**, **Let the buyer change them on PayPal**, or **Don't show them on PayPal**.
  - **Store name on PayPal**: the name PayPal shows on its payment pages (placeholder "Your store name"; at most 127 characters).
  - While **Buyer data** is **None**, the two other settings are greyed out.
- **Card form**, saved with its own **Save**: how a card is taken at checkout, **PayPal's guest card form (default)** or **Shop card form (advanced card payments)**. It applies to new checkouts only. To select the shop card form you must first tick **I confirm the points above.**, under "Before you select the shop card form, confirm:", which lists three points: Advanced Credit and Debit Card Payments is enabled on your PayPal business account; you determine your PCI DSS self-assessment level with PayPal (ShopForge does not claim one for you); and ShopForge operates the content security policy, the script inventory, tamper detection and external vulnerability scans on the pages that embed PayPal. If PayPal reports advanced card payments as not available, the buyer gets the guest form instead, and the page adds a notice with the date of the last such checkout.
- **Email the buyer when a PayPal payment is still being confirmed after (minutes)**, saved with **Save delay**. PayPal sometimes takes a payment without settling it right away (a security review, an eCheck, a receiving preference on your PayPal account); the order then waits, open and unpaid, with its stock reserved. Most holds clear within minutes, so the buyer is only emailed once the hold has lasted this long. Between 10 minutes and 24 hours, 60 by default; it cannot be turned off.

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QR codes

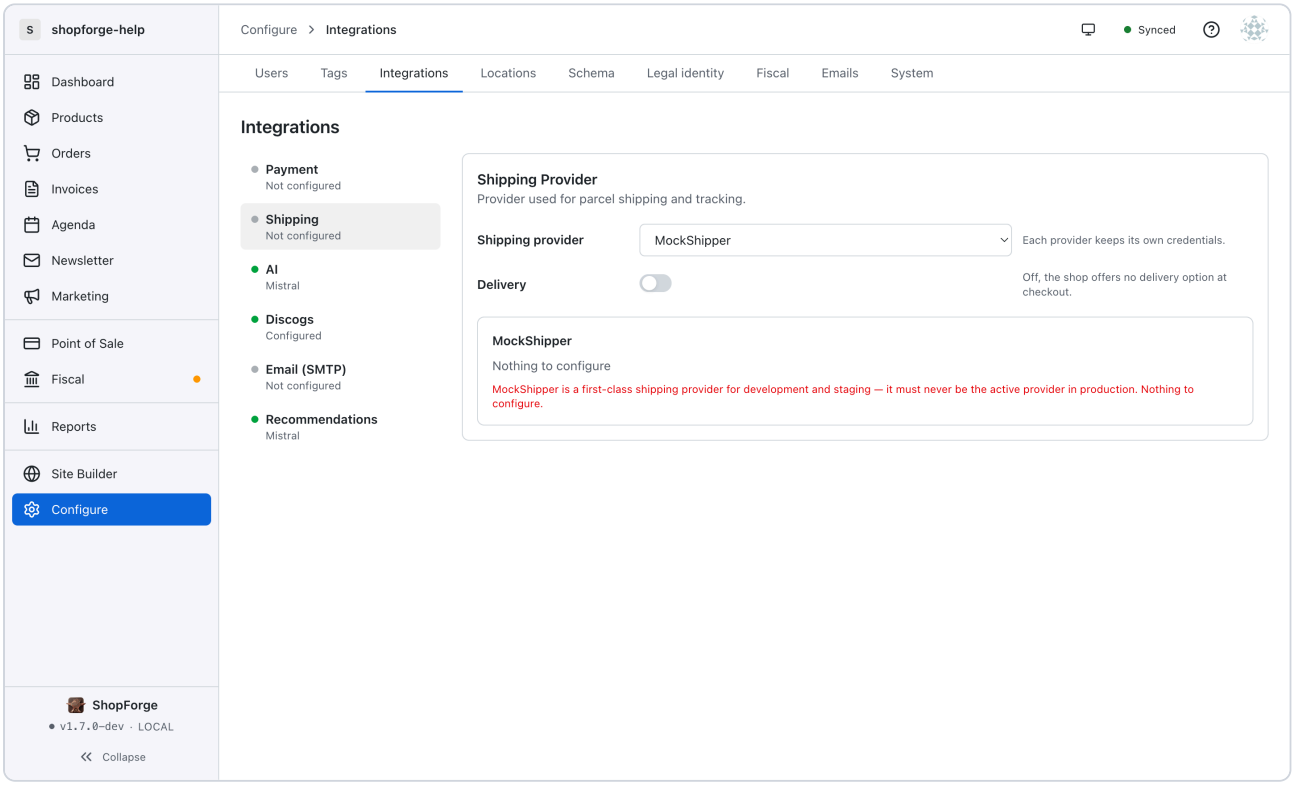
Under **QR codes**, two groups of the same shape (shown only when PayPal is the active provider), each with a switch, a validity and its own save button:

- **QR code at the till**: **Offer PayPal by QR code at the till** lets cashiers take PayPal by QR code at the register (see Pay with a PayPal QR code). Off, PayPal is not in the payment list at the till. **QR code validity at the till (minutes)** is how long a code can be scanned. Saved with **Save till QR settings**.
- **QR code payment** (online): **QR code online: buyers can pay with PayPal by scanning a code**, with **QR code validity (minutes)**, saved with **Save QR settings**.

Validity is a whole number of minutes from 2 to 30, 10 by default; once a code expires, nothing is charged. A change applies to new QR payments only.

Which countries PayPal accepts for delivery is PayPal's decision for your account, and it can change. ShopForge does not refuse a country in advance: if PayPal declines one, the buyer is told PayPal does not accept payments for delivery to that country, the order is cancelled and their cart kept.

Shipping provider



Configure → Integrations → Shipping. The **Shipping** tab sets the service used for parcels and tracking, and the weights, delivery options and customs defaults that go with it. A **Test mode** badge appears while SendCloud is in test mode. The tab is a provider menu and a **Delivery** switch, then four blocks, **Credentials**, **Parcels**, **Delivery options** and **Customs defaults**. Each

block has its own save button and one status line, which says what a save did, and what stopped it; there is no pop-up message.

Provider and SendCloud credentials

Choose the **Shipping provider** (**MockShipper** or **SendCloud**): the choice applies at once ("Settings saved"), and **In service** appears beside the provider that is saved, with delivery on. Each provider keeps its own credentials. The **Delivery** switch ("Delivery on") turns delivery on or off, and applies at once too: off, the shop offers no delivery option at checkout. If the platform refuses a change (for example, turning SendCloud on before its credentials are saved), the menu or the switch goes back to what was saved and the status line under them says why.

- **MockShipper** is "a first-class shipping provider for development and staging — it must never be the active provider in production." Its block says **Nothing to configure**; no other provider says that. It is not offered where the app says "The test provider is not allowed in production — choose SendCloud."

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- **SendCloud** shows the **Credentials** block, with a **Saved** or **Not saved** chip and these rows:
  - **Environment**: **Live** or **Test**. The hint under it reads "Test mode simulates sending parcels through SendCloud, but prints no real labels or delivery slips and creates no real shipment." In **Test**, quotes, carriers and pick-up points are read from your real SendCloud account, but announcing and cancelling parcels is simulated, with a test label and a fake tracking number, and nothing is created in SendCloud. **Live** uses the same account and credentials for real shipments, and is only allowed in production (otherwise: "The live environment is only allowed in production."). Changing it alone is saved with **Save credentials**.
  - **Public key** and **Secret key**: once saved they show dots and their last four characters, never the whole key. **Replace** next to the secret key opens both fields empty to type a new pair (the webhook secret you saved is kept); **Remove** deletes the credentials in two steps (**Confirm removal**, **Cancel**).
  - **Webhook URL**: read-only, with **Copy** ("Webhook URL copied."). Register it as a webhook in SendCloud; it does not change.
  - **Webhook secret**: required. SendCloud uses it to send the shop parcel tracking. **Generate** fills a new secret of 32 characters (letters, digits and a few symbols), shown in full until you save it; the status line then says to copy it with **Copy** and paste it into SendCloud, then save. You can also paste a secret you already use, from 16 to 200 characters without spaces. Once saved, the field shows dots and its last four characters, and **Copy** still copies the full secret, at any time ("Webhook secret copied."); only an administrator can ("Only an administrator can copy the webhook secret."). Generating another secret means putting it into SendCloud again.
  - **Save credentials** saves the block and checks the credentials with SendCloud ("Credentials saved and verified"). Typed alone, a new webhook secret is saved without retyping the keys. With nothing saved yet, it needs the public key, the secret key and a webhook secret. Credentials saved before the webhook secret was required show "Webhook secret missing: generate one and paste it into SendCloud" until one is saved; delivery keeps working meanwhile, and SendCloud's tracking messages are refused. **Test connection**, in the status line, checks the saved credentials again.
- With SendCloud, a customer who picks a method delivered to a pick-up point chooses the point in SendCloud's selector at the delivery step of checkout. The selector is a SendCloud script that loads only when the customer opens it, so SendCloud then sees the customer's IP address: check that SendCloud is listed among the processors in your privacy policy and that the policy mentions the visitor's IP address when the selector is used. Your SendCloud **Public key** is sent to the customer's browser for this; the **Secret key** never leaves the server.

Parcel weights

The **Parcels** block, once a provider is saved:

- **Packaging weight (g)**: added to every shipment on top of the product weights.
- **Default weight per item (g)**: used for a line whose variant has no weight; a whole number of grams from 1 to 50 000 (250 when never set).

Save parcels saves both; the status line says "Settings saved", or what is wrong with a weight.

Delivery options

Once a provider is saved, **Delivery options** lists what customers can pick at checkout. Each row has a **Name**, a **Kind** (**Home delivery** or **Pick-up point**), the **Carriers**, a **Factor**, a **Fixed (€)** amount, a step **Rounded up to** and an **Enabled** switch, plus move up / move down and **Remove this option**; **Add an option** adds a row. A disabled option stays in the table, dimmed, and is not offered. The carriers are chips: the ✕ of a chip removes it, and the search field lists the carriers not chosen yet (↓ ↑ and Enter choose, Esc closes, Backspace in the empty field removes the last chip). With no chip the option says **All carriers**. The price is the cheapest quote × factor + fixed, rounded up to the step. A name is 1 to 60 characters and unique, the factor between 0 and 10, the fixed amount between 0 and 1 000 €. **Save options** saves the rows; the status line names the problem, such as a duplicate name, when it refuses. An option has no description.

Customs defaults

Customs defaults gives each product category an **HS code** (6 to 10 digits) with **Add** and **Save customs defaults**. A product without its own HS code takes the code of its category, or of the nearest group above it; a variant's own code wins. The table waits until a shipping provider is saved ("Save a shipping provider first; the customs defaults belong to it."). The **Origin country** is shown read-only, in the status line: the country of the default shop. Use **Change in Locations** to change it. A save's result replaces that line until the next action.

EORI number, in the same block, is the shop's customs number: `FR`, then 12 to 15 digits or capital letters ("The EORI number starts with FR, followed by 12 to 15 characters."). It is optional, saved with the block, and cleared by emptying the field. Every parcel leaving the EU carries it, from any channel (see Parcels leaving the EU). It is not part of Legal identity, because no invoice or receipt prints it.

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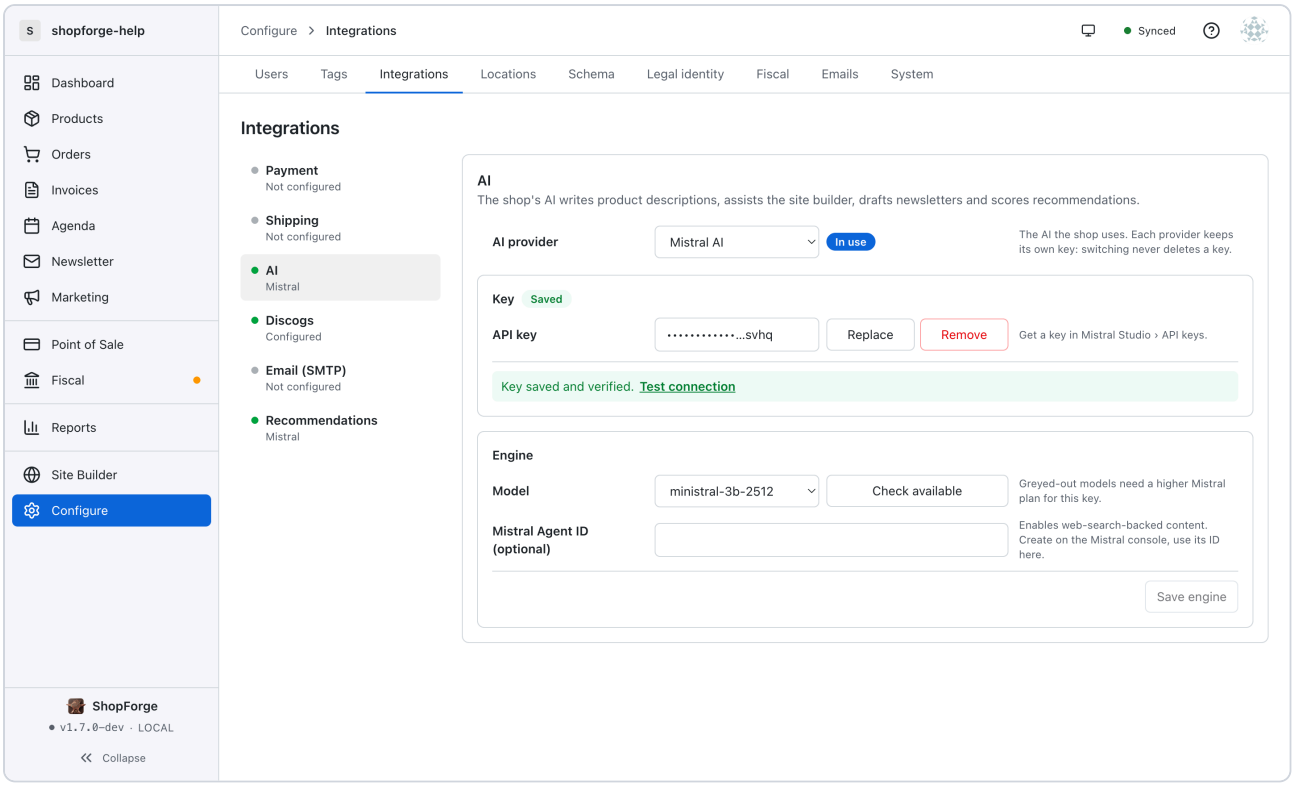
AI



Configure → Integrations → AI. The **AI** tab sets the shop's AI, which writes product descriptions, assists the site builder, drafts newsletters and scores recommendations. It is one **AI provider** menu, then two blocks for the provider you picked: **Key** and **Engine**. The blocks keep the same rows whatever the state, so nothing moves when you switch provider or save.

AI provider

The **AI provider** menu offers **Mistral AI** and **Anthropic Claude**. It is the AI the shop uses. Each provider keeps its own key: switching never deletes a key, so switching back needs no key.

- A provider that has a key becomes the one in use at once. The chip beside the menu reads **In use**; there is no confirmation to press.
- A provider with no key shows its empty key form and the chip **Needs key**. The shop keeps using the other provider until you save a key here; saving it makes this provider the one in use.

Key

The **Key** block shows **Saved** or **No key**, and the **API key** row:

- With no key, type it and press **Save key** (or Enter). The key is checked with the provider first; while it is, the status line reads "Checking the key...". If it is refused you read "The key was not accepted. Check it and try again." and nothing is stored. When it is accepted, the line reads "Key saved and verified." with a **Test connection** link.

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- With a key, the field shows it masked, ending with its last characters; the key itself is never shown again. **Replace** opens an empty field with **Save key** and **Cancel**; the old key stays valid until the new one is saved. Replacing a key keeps the provider's model, effort and Agent ID.
- **Test connection** checks the saved key again and says "Connection verified" or "Connection test failed: {reason}".
- **Remove** asks for **Confirm removal** (or **Cancel**), and the line then reads: "Remove the key to stop using this provider. The shop then falls back to the other provider if it has a key." Removing deletes the key and the provider's model, effort and Agent ID.

The key is stored on the platform and also kept on this computer, so that scoring needs no new fetch. Save and Replace write both places and Remove drops both. If the key cannot be kept on this computer you read "The key could not be kept on this computer."; if it was removed but the copy here could not be deleted, "The key was removed, but its copy on this computer could not be deleted."

Every message of the Key block, and of the Engine block, appears on the single status line at the bottom of the block.

Engine

The **Engine** block sets how the provider answers. It is always editable once a key is saved, **without typing the key again**, and it has its own **Save engine**, which is on only when a field differs from what is saved. Saving the engine does not touch the key. With no key, the controls are greyed out and the line reads "Save a key to choose the engine."

Mistral AI.

- **Model**: the four Mistral models. Press **Check available** to check, with the saved key (nothing to type), which of them the key can use; the ones its plan does not cover are greyed out and marked "not available on your plan" (they need a higher Mistral plan). The check does not run by itself. If it fails you read "Could not check the available models: {reason}. Try again." and the saved model stays selectable. If the saved model is no longer allowed, it is shown greyed out, **Save engine** stays off, and the line reads "This key can no longer use {model}. Choose another model."
- **Mistral Agent ID (optional)**: "Enables web-search-backed content. Create on the Mistral console, use its ID here." A saved Agent ID is never shown; the field shows dots when one is set. Type a new one to change it.

Anthropic Claude.

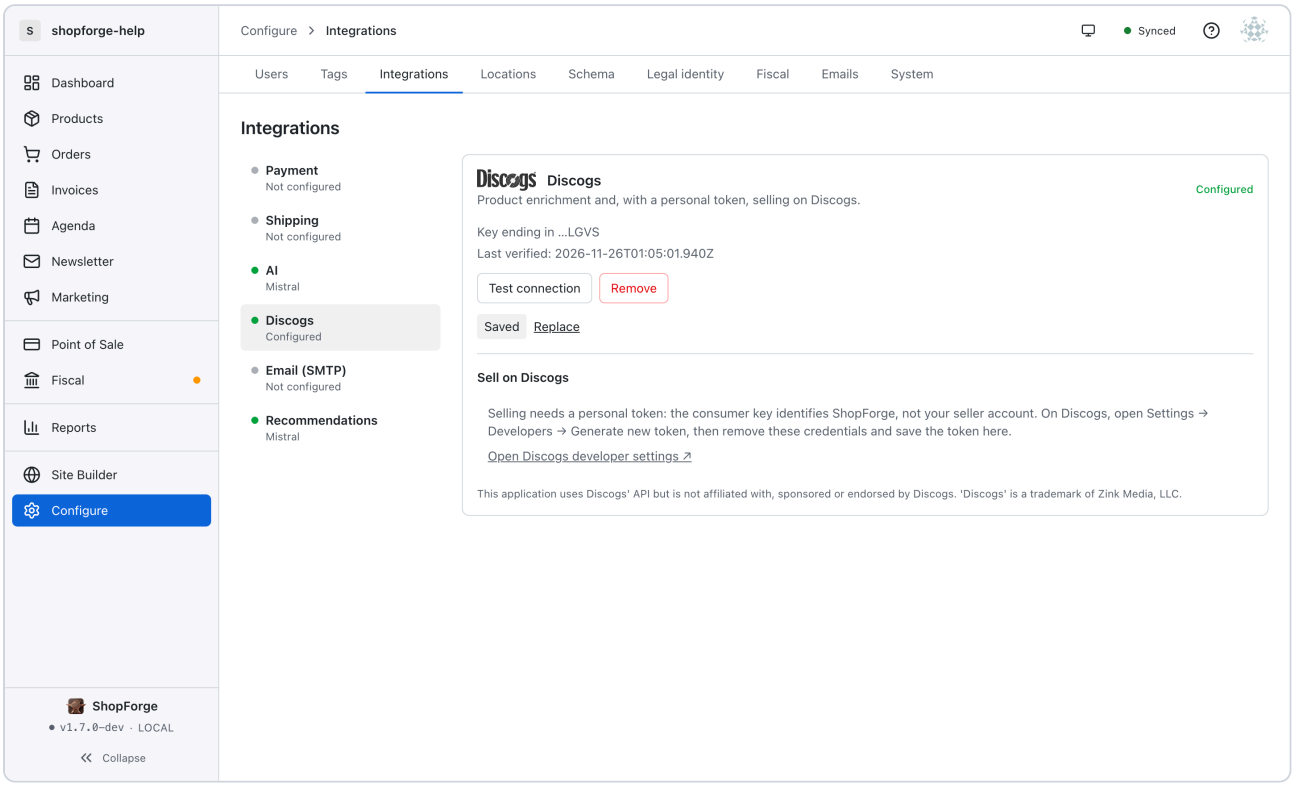
- **Model**: Claude Haiku 5.5 (`claude-haiku-5-5` , the default) or Claude Sonnet 5.5 (`claude-sonnet-5-5`).

- **Effort**: **Low** (the default), **Medium** or **High**: "How hard the model thinks before it answers. Low is the fastest and the cheapest." The effort applies to Generate on a product description and to the recommendation scoring, when Claude is the AI in use.

After a save the line reads "Engine saved"; if the platform refuses it, "The settings were not saved: {reason}".

If no key is saved for either provider, the Recommendations tab says no AI is configured.

Discogs



Configure → Integrations → Discogs. The **Discogs** tab connects your Discogs account. It powers the **Import from Discogs** search in the product form (by title, artist or barcode), which pre-fills the product fields, and, with a personal token, selling on Discogs. Its status reads **Configured** or **Not configured**, and a **Practice mode** badge appears while the sales channel is in practice mode.

Connect Discogs

Choose the **Authentication mode** and enter the secrets:

- **Consumer credentials**: **Consumer key** and **Consumer secret**. For enrichment only; it cannot be used to sell.
- **Personal user token**: a single **User token**, "Needed to sell on Discogs." Create it on Discogs under Settings → Developers → Generate new token.

Press **Save credentials** ("Credentials saved and verified"). One mode is kept at a time; saving one replaces the other. Once saved the tab shows **Key ending in {hint}** and **Last verified**, the secret reads **Saved**, and **Replace** opens the form again (with **Cancel**). **Test connection** checks the token and records the Discogs user. **Remove** needs a second click; with a token the button reads **Remove and stop selling on Discogs**, and the note says the channel stops and its schedules are deleted, while the links to your Discogs listings are kept so reconnecting the same account resumes. These buttons need a connection and are disabled offline.

Sell on Discogs

Below, **Sell on Discogs** holds the channel settings. They need a personal token: with none saved the tab says to connect one, with consumer credentials it says selling needs a token and links to **Open Discogs developer settings**. With a token it shows **Selling as {username} · {currency}** and **Last successful test**. The channel can only be enabled if the Discogs selling currency is the shop's; otherwise the tab says ShopForge never converts prices. If Discogs refuses the token, the channel is paused until you test the connection or save a new token.

- **Channel**: **Sell on Discogs** (checks Discogs for new orders every 2 minutes and reconciles stock every night; ticking it tests the connection first) and **Practice mode**.
- **Defaults for new listings**: **Comment**, **Allow offers**, **Location** (only you see it on Discogs), **New listings go on Discogs**, and under **Publishing**, **Publish automatically** (unavailable until an adoption is complete) and **Publish as Draft** (single publishing only).
- **Messages to the buyer**: **When preparing** and **When shipped**, optional, added to Discogs' status message.
- **Discogs GB VAT number**, optional: "Enter the number Discogs gives sellers for shipments to the UK of £135 or less." It is `GB` and 9 or 12 digits ("The number starts with GB, followed by 9 or 12 digits."). Discogs collects the UK VAT on those orders, and the parcel carries Discogs's number so that the buyer is not charged it twice. Above £135 the number is never used. Without it, the label of such an order is refused (see Parcels leaving the EU).

Ticking **Sell on Discogs** and unticking **Practice mode** need a connection; the other settings can be edited offline and are sent later. **Save** applies the defaults. A line under the tab states that the app uses Discogs' API but is not affiliated with or endorsed by Discogs (in English in both languages). Orders, adoption, the practice log and the channel's health are in Discogs sales.

Practice mode and going live

The channel starts in **Practice mode**: ShopForge rehearses every change and lists it in the practice log instead of sending it to Discogs, and an amber banner reads "PRACTICE MODE — NOTHING IS SENT TO DISCOGS". Unticking it asks "Start changing your live Discogs shop?": ShopForge will start changing the live Discogs account (listing quantities, drafts and orders), and the first live sync sets every linked listing to ShopForge's price, grades, comment and offers, so

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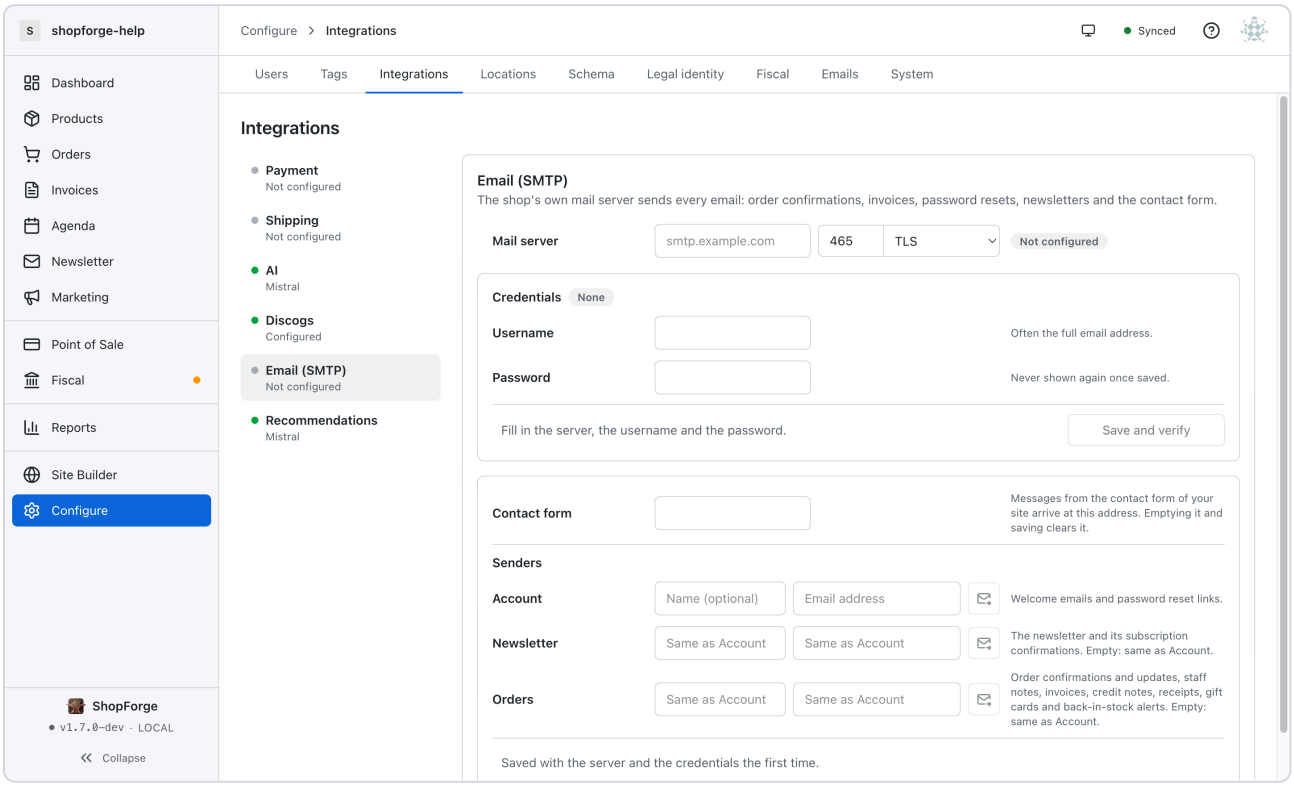
edits made on the Discogs website until now are overwritten once. Check the practice log first. Confirm with **Switch off for {username}** or **Cancel**.

Changing the Discogs account

If you save or test a token that belongs to another Discogs user, the channel pauses. You can save the previous account's token to continue, or press **Switch to {user}…** (**Switch accounts…** when the name is unknown). The confirmation "Sell as {new} instead of {old}?" says the links between your products and the old account's listings are discarded, the channel stays paused until you tick **Sell on Discogs** again, and publishing waits for a new adoption. Confirm with **Discard links and switch**. **Sell on Discogs** cannot be ticked while a switch is pending.

SMTP email



Configure → Integrations → Email (SMTP). The **Email (SMTP)** tab holds the shop's own mail server. It sends every email: order confirmations, invoices, password resets, newsletters and the contact form. The whole configuration sits in one bordered box, like the AI and Shipping tabs.

Before it is configured, fill in:

- **Mail server**: the host (for example `smtp.example.com`), then **Port** and **Encryption** in one cell (465 and TLS by default, or STARTTLS), and the chip **Not configured** or **Configured**.
- **Credentials**: **Username** (often the full email address) and **Password**. The password is never shown again once saved.

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- **Senders**: who the emails come from. Each sender has a **Name (optional)** and an address.
  - **Account**: welcome emails and password reset links, and the address every other email falls back to. Its address (placeholder **Email address**) is required to send any email. You can save the server first and enter it afterwards, but once it is saved it cannot be emptied.
  - **Newsletter**: the newsletter and its subscription confirmations.
  - **Orders**: order confirmations and updates, staff notes, invoices, credit notes, receipts, gift cards and back-in-stock alerts.
  - **Orders** and **Newsletter** may be left empty: the name or the address left empty is then the one of **Account** (both fields read **Same as Account** while empty). The name and the address are independent, so you can give **Orders** its own name and keep the **Account** address. A name cannot contain `<` or `>`, and is at most 100 characters.
- **Contact form**: the recipient, optional. It sits in the same box as the senders.

Save and verify needs only the connection: the server, the username and the password. It never asks for a sender. ShopForge logs in to the server first: if it refuses, nothing is saved. Senders and a contact form recipient you have already typed are saved with the server and the credentials the first time; otherwise enter them afterwards and choose **Save** in their box.

Once the server is saved and no **Account** address is saved yet, a yellow line at the bottom of the senders box says **No Account sender: the shop sends no email.** and the **Send test email** buttons stay off. Enter the **Account** address and choose **Save**.

Once configured the tab shows the **Mail server** line with **Verified on** its date, the senders, and **Test connection** and **Remove** (which asks you to confirm). The password reads **Saved**; **Replace** types a new one. Changing the server asks you to save and verify again. Changes to the senders and the contact form recipient are saved with one **Save**, and the tab says **Changes not saved yet** until you do. It saves the senders first, then the recipient. If the server refuses a sender, nothing in the box is saved and the fields keep what you typed. If the senders are saved but the recipient is not, the tab says so.

Each sender has a **Send test email** button, an envelope icon at the right end of its row. It is off while that row has unsaved or invalid text, while the server is not saved yet, and while there is no **Account** address. It sends a message from that sender to your own address, the one you are signed in with. The result names the full sender, name and address: "Test email from *Name*

sent to … and accepted by the server." If the server refuses the sender, the message says which one and why; use another address, or ask your provider to allow this one.

The contact form recipient is the address where the contact form of your site delivers its messages. It is independent of the credentials: saving it does not touch them. Emptying it and saving clears it.

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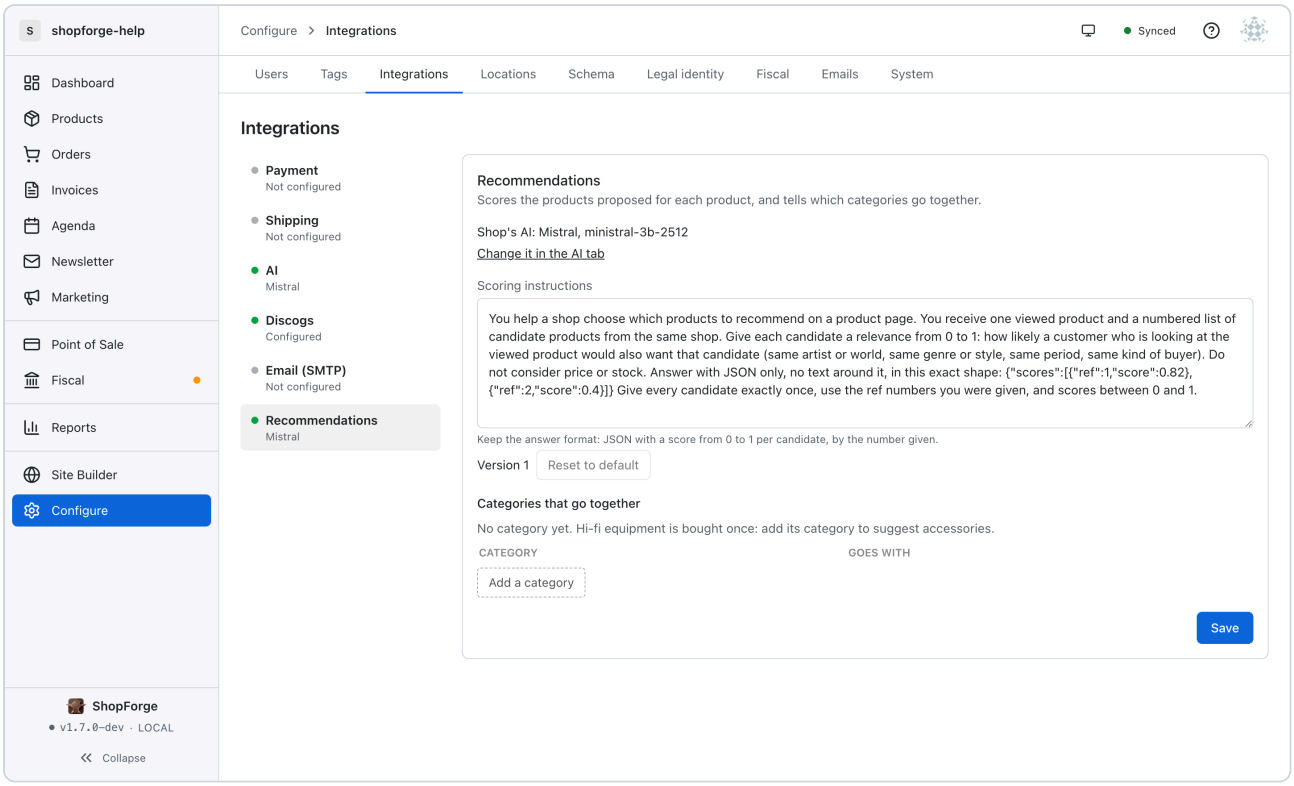
__Remove__ also clears the server, the senders and the contact form recipient. The shop then sends no email, and the contact form stops working, until they are set again.

Recommendations



Configure → Integrations → Recommendations. The __Recommendations__ tab sets how the shop's AI scores the products proposed for each product: the AI in use (chosen in the __AI__ tab, with a link to it), the scoring instructions, and the categories that go together. It is documented with the feature itself in Product recommendations.

Related

- *Discogs sales — the Discogs sales channel, adoption and practice log*
- *Products — Discogs import pre-fills the product form*
- *Newsletter — SMTP sends it and the Mistral agent powers its music-news section*
- *Site builder — the shop's AI is the site builder assistant*
- *Product recommendations — the Recommendations tab*

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Discogs sales

The **Discogs sales** tab is where you watch your Discogs sales channel and run its larger jobs: checking that the sync is healthy, deciding on the Discogs orders that were already open when you started, putting many listings on Discogs at once, reading its report, and linking the listings you already have on Discogs to your ShopForge products (the *adoption*). It is under **Configure → Discogs sales**, and only administrators can open it. The tab appears only once Discogs is connected with a personal access token and selling is turned on in Integrations (see *Before you start*).

The tab and the adoption pages work against the server, not the local copy. When you are offline they say they need a connection.

Before you start

The **Discogs sales** tab is not in the Configure list until you have saved a Discogs personal access token and turned the channel on in **Configure → Integrations → Discogs**. With no Discogs credentials, with the channel off, or with a consumer key and secret (they only look up the catalogue and cannot sell), there is no tab; it shows or hides as soon as you change this, without restarting. Once the tab is there, it shows its cards only when the Discogs account has been checked (use **Test connection** on the Discogs card). Until then it reads "Connect a Discogs personal token in Integrations to sell on Discogs." with an **Open Integrations** link. Connecting the account, the personal token and the channel settings (turning the channel on, practice mode, defaults for new listings, automatic publishing) are on **Configure → Integrations → Discogs**: see Integrations. The link **Channel settings in Integrations →** at the top of the tab takes you there.

For how a product is put on Discogs and how a Discogs order looks once imported, see Products and Orders.

The Discogs sales tab

From top to bottom, the tab shows:

- the amber strip **PRACTICE MODE — NOTHING IS SENT TO DISCOGS**, while practice mode is on (see below);
- a line **{n} open Discogs orders to decide →**, when some of your open orders still wait for you; it takes you down to their card;
- the **Adopt your Discogs inventory** card;
- **Channel health**, with its cards, then **Open when you started** and **Orders not imported** when they have something to show;

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- a line **{n} products on Discogs aren't ready**, with **Show them →**, when some products you put on the channel are not ready for Discogs. It opens the product catalogue filtered on those products;
- the **Publishing** card;
- the **Report** card (see *Fees and reports* below).

Every screen that shows Discogs data ends with the line "Data provided by Discogs.", linked to your Discogs seller page.

Practice mode

While practice mode is on, ShopForge rehearses every change instead of sending it to Discogs, and lists it in the **Practice log**. You switch practice mode off in the channel settings in Integrations, which asks you to confirm that ShopForge will start changing your live Discogs account. Check the practice log before you do.

On this tab, practice mode shows as the amber strip, and it changes three things:

- the **Practice log** card opens by itself;
- the open orders cannot be imported or marked handled (see Orders open when you started);
- bulk publishing says "(practice mode: nothing is sent)" and creates nothing on Discogs.

Adopting your inventory also works in practice mode, since it writes nothing to Discogs.

Channel health

Channel health answers one question: is the sync working? Press **Refresh** to read it again; "Updated {time}" tells you when it was last read. It is not refreshed on its own. If it cannot be read you see "Couldn't load the channel health." with **Retry**. Each card has a one-line summary, and the cards that need your attention open by themselves.

A listing's price on Discogs does not change while one of its copies is in an open Discogs order; the new price goes out once the order closes.

- **Connection** — the Discogs user and when the connection was last tested. If Discogs refused the token, it says so with the date. Save a new token or test the connection in Integrations.
- **Jobs** — "All jobs ran fine" or "{count} kinds failing". The table gives, for each kind of job (Order check, Stock sync, Publish, Inventory export, Reconcile, Order update, Discard links), the last success and the last error.
- **Failed jobs** — jobs that gave up after every retry in the last 7 days, and stock changes that could not be passed to Discogs in the same period. For the stock changes, "The daily check puts the listings right."

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- **Rate limit** — how many requests are left, or "Waiting for Discogs until {time} (too many requests)". Discogs limits how many requests ShopForge may make; nothing to do but wait.
- **Daily check** — once a day, ShopForge compares Discogs with ShopForge. It tells you when the last check ran, and lists what it found:
  - listings put right that the live sync had missed;
  - listings edited on the Discogs website, which are left as they are;
  - Discogs listings not linked to a ShopForge listing (the ones you have not dismissed), with the button **Link them with an adoption run →**, which opens the current adoption run for review or takes you to the adoption card to start one. They are all listed in Listings found on Discogs.

  If listings differed two days running, the card turns red: "Something is not syncing: investigate." In practice mode nothing is compared.
- **Practice log** — the rehearsed changes (the last 500, kept 30 days). Open an entry to see the request that would have been sent. When practice mode is off, the log shows past rehearsals only.

If Discogs refuses the token

When Discogs refuses the shop's token, the channel pauses: nothing is pushed to Discogs or read from it. An amber notice, "Discogs sales are paused", appears at the top of this tab and of the Discogs connection settings, for administrators only. It says "Discogs refused the shop's token on {date}, so nothing is pushed or read until the channel is resumed. Replace the token in the Discogs connection settings, then resume the channel." The button **Open connection settings** takes you there. Nobody is sent an email: the notice stays until the channel is resumed.

Listings to fix

The card **Listings to fix** lists the listings ShopForge could not keep in step with Discogs ("These listings are not in sync with Discogs."), one row for each problem. The columns are **Product** (its name; click it to open the product), **Problem**, **Reason** and **Since**:

- **Link broken** — the Discogs listing is gone, so the link between it and the ShopForge listing is broken.
- **Discogs rejected the last update** — the reason is Discogs' own message (for example a price that is too low). ShopForge does not try again until you change the listing.
- **Differs from Discogs** — the reason names the fields (price, condition, comments...) that were edited on the Discogs website; they are left as they are.

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A row goes once the problem is gone, for example after the next successful sync. With nothing to fix the card says "No listing needs fixing." The card needs a connection to the internet.

Listings found on Discogs

The card **Listings found on Discogs** lists the listings created on the Discogs website that are not linked to a product ("These listings were created on the Discogs website and are not linked to a product."). It lists all of them, not only the first few. The columns are **Listing** (a link to its page on Discogs), **Release**, **Price** and **Seen since**, the day the daily check first saw it. For each one:

- **Link** — opens the current adoption run for review, or takes you to the adoption card to start one (see Adopting your Discogs inventory).
- **Dismiss** — says you do not want to link this listing. There is no confirmation and no undo: the row reads "Dismissed by {name}" for a moment, then goes, and the listing is never offered again.

A listing leaves the card by itself once it is linked, or when it is no longer on Discogs. With none, the card says "No unlinked listing." The card needs a connection to the internet.

Orders open when you started

When you first turn the channel on, ShopForge does not import the orders Discogs already had. Those that were still open are listed in the card **Open when you started**, because each one took no stock in ShopForge. The card appears only when there is such an order. Its table shows the order number (a link to its page on Discogs), status, buyer, total and date. Decide each order:

- **Import** — asks "Import order {id}? Its copies are taken from stock." then confirm with **Import**. The order is created in ShopForge and its row reads **Imported**, with a link to it.
- **Handled by hand** — for an order you already dealt with outside ShopForge. The row then reads "Handled by hand" with your name and the date. There is no undo and no bulk action: each order is decided on its own.

The tab keeps telling you how many orders are still undecided until none is left. In practice mode both buttons are disabled: "Import and Handled by hand are possible once practice mode is off."

Orders not imported

Orders not imported lists Discogs orders ShopForge could not bring in, with the reason: "Sold in {currency}; your shop sells in {shop}." (ShopForge never converts prices) or "Gave up after several tries" followed by the message. The card appears only when there is such an order.

There is no button here. These orders took no stock in ShopForge, so the copy may still be for sale in ShopForge: handle the order on Discogs (the order number links to it) or by hand in

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ShopForge, and adjust the stock by hand.

Publishing many listings at once

The **Publishing** card puts on Discogs, in one go, every ready listing that is on the channel, has stock and is not on Discogs yet. Publishing a single listing is done from the product itself (see Products).

1. The card counts the listings: "{n} listings are ready and not on Discogs yet". Until an adoption is finished it says "Complete an adoption first, so nothing already on Discogs is listed twice." instead.
2. Choose **Put them all on Discogs…**.
3. Read the confirmation: the listings go For Sale at once; publishing many at once ignores **Publish as Draft**, which is a Discogs rule for bulk uploads. Confirm with **Put {n} on Discogs**.
4. Follow the progress lines ("Choosing the listings to upload…", "Uploading file {done} of {total}…", "Discogs is processing the upload, then the new listings are linked…"). You can leave the tab; the card finds the batch again when you come back. Only one upload runs at a time.
5. Read the result: "{published} published · {refused} refused". Listings already on Discogs are left out (see the adoption review), and so are those in an open Discogs order. Each refused listing is shown with Discogs' reason and an **Open product ↗** button to correct it. Only the first refused listings are shown.

The button needs a connection.

Adopting your Discogs inventory

If you already sell on Discogs, adoption links each of your Discogs listings to the ShopForge listing of the same copy, so nothing is listed twice. "Nothing is created, changed or deleted on Discogs." Do it before you publish anything: publishing is not allowed until an adoption is finished.

1. In the **Adopt your Discogs inventory** card, choose **Start adoption**. Only one run can be active at a time; while one is running or waiting for your review, the button is disabled and says why.
2. The card follows the run: **Exporting from Discogs → Matching → Review → Done**. Discogs prepares the export, which "can take up to 30 minutes; you can leave this screen". Then ShopForge matches your listings ("Matching {count} listings…"). There is nothing to cancel.
3. When the run is ready, the card says "Ready for review since {date}." and shows the counts per outcome. Choose **Review**.
4. If the run fails, the card gives the reason; choose **Start again**.

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After a finished run, **Start a new run** links only what is not linked yet; links already made are never changed.

Review an adoption

The review page, at **Configure → Discogs sales →** *Adoption of your Discogs inventory*, has the link **← Discogs sales** to come back. It lists your Discogs listings next to the ShopForge listing proposed for each, 50 at a time (**Load more results**).

Filter the listings with the chips: All, Matched, Ambiguous, Grade differs, Unmatched, Invalid, Already linked, each with its count, then **Stock differences** and, once products were created as drafts, **Created as drafts**.

A row shows the Discogs listing (artist, title, media and sleeve grade, price, quantity), the ShopForge product and grade with its price and stock, and small tags for what differs: the price (the Discogs price is kept), the comment (the Discogs comment is kept), the stock, and the sleeve grade ("correct one side"). The buttons depend on the outcome (next section). A refused action turns the row red and gives the reason. The product buttons **Open product ↗** open the product so you can correct it; the row is re-read when you close it.

To act on several rows, tick them (or **Select all listings shown**) and use the bar: **Create products for selected**, **Skip selected**, and on the Stock differences filter **ShopForge wins for selected** and **Discogs wins for selected**. **Clear** empties the selection.

Three actions work on the whole run, each asks to confirm first and shows how many listings it touches:

- **Link all matched ({n})…** links every matched listing;
- **Skip all invalid…** — skipped listings cannot be reopened;
- on the Stock differences filter, **ShopForge wins for all…** and **Discogs wins for all…**.

While one of them runs, the page says "Working on it: {processed} done, {failed} refused."

What each outcome means

- **Matched** — one ShopForge listing is the best fit. **Link** it, or **Skip** the row. If several free listings of the same release and grade exist, **Pick another…** lets you choose a different one before linking. When only the sleeve grade differs, **Link** stays disabled until you pick another listing; otherwise open the product, correct one side, and the row is evaluated again.
- **Ambiguous** — several listings fit equally well. Choose one in **Pick the listing…**, then **Link**; or **Skip**.

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- **Grade differs** — ShopForge has the release, but no free listing with this grade ("No listing graded {grade}." or "Every {grade} listing is already linked."). Each copy is its own product: **Create product from release**, or **Skip**. When it is a later one of several identical copies ("Same copy as (1)"), the button reads **Own product** and a third choice appears: **Fold into (1), +{n} stock**, which adds the quantity to the first copy's listing instead of creating a product. It is available once the first copy is linked ("Link the other copy first.").
- **Unmatched** — no product in ShopForge has this release ("No product with this release."). The row shows the format and **View on Discogs ↗**. **Create product from release**, or **Skip**.
- **Invalid** — the line of the Discogs export could not be used, e.g. "Line {line}: {field} is missing". Only **Skip**.
- **Already linked** — linked in an earlier run; nothing to do.

After an action the row reads **Linked.**, **Skipped.** or **Folded into the other copy.**

Stock differences

When a linked listing has a different stock in ShopForge and on Discogs, the row shows "ShopForge {n}, Discogs {n}" and a choice **Which stock wins**:

- **ShopForge wins** — Discogs is set to ShopForge's stock once the channel is live;
- **Discogs wins** — ShopForge's stock is adjusted to Discogs' and recorded as "Discogs adoption";
- **Leave** — decide later.

Use the **Stock differences** filter to see them, and the bulk buttons to settle many at once.

Create products from releases

For an unmatched or grade-differing listing, **Create product from release** (or **Create products for selected**) queues the creation of a product from the Discogs release. The row reads "Waiting for its product to be created."; then "Product created and linked." A product with a missing required field is created as a draft and linked: "Product created as a draft (a required field is missing) and linked."; the **Created as drafts** filter lists them.

Discogs allows 60 requests a minute, so a large run takes a while. The panel **Creating products from Discogs** shows "{done} of {total} releases · about {minutes} minutes left", and **Pause** and **Resume** (the run then reads "Paused at {done} of {total}"). Products that could not be created are "open again with the reason". You can leave the page; the work goes on.

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Finish the adoption

When you have gone through the rows, choose **Finish adoption…** at the bottom of the page and confirm: "Publishing on Discogs is allowed from then on." The page confirms "Adoption finished. Publishing on Discogs is now allowed." A run waiting for review blocks the start of a new one until you finish it.

Fees and reports

Choose **Discogs** in the channel filter of **Orders** to see only your Discogs orders. A Discogs order shows its **Discogs fee** under the payment: a cost of the sale, not charged to the buyer. In practice mode there is no fee, and the order shows none.

The Discogs report. Under **Configure → Discogs sales**, the **Report** card gives the figures of the channel for a month (the last one by default) or a year: **Revenue incl. VAT**, **Discogs fees**, **Net** (revenue minus fees), the number of **Orders** and of **Cancelled** ones, a **VAT** table and a table day by day. A cancelled order counts in neither revenue nor fees, and in practice mode the fees are zero. The report is computed from the Discogs orders each time you open it; it is not signed itself. The Discogs sales it shows are signed on the online register (ONLINE) and are counted in the Global Z report, so the report is a view of the channel, not a fiscal report of its own. It needs a connection.

- The **VAT** table has one row per **Treatment**, **Country** and **Rate**, with **Excl. VAT**, **VAT** and **Incl. VAT**: the same names as an order's detail and as the report Distance-sale VAT. A margin-scheme row is tagged **Margin**. A Discogs order is taxed like any online order, by where it is delivered (see VAT of an online order); a Discogs buyer is always a consumer. An older order without a treatment counts as French VAT.
- **Download CSV** gives a zip of tables: the days, the VAT (by treatment and country), one row per order, and a README.
- **Accounting export (Discogs fees, FEC format)** gives a file for your accountant, in a journal of its own, with the Discogs fees only: each fee is a cost, against the Discogs receivable. The sales themselves, with their VAT, are not in this file: they are written once, in the web journal of the Global Z report's accounting export, on the day of the payment. The sales and VAT accounts are the ones of the accounting settings.
- **Report settings**, in the card, set the journal code and label (by default `DIS` and « Frais Discogs »), the Discogs receivable account (`467100`) and the marketplace fees account (`622200`, « Commissions et courtages sur ventes »: a marketplace fee is a commission on sales). The Discogs receivable is the account the web journal of the Global Z debits for a Discogs payment. These defaults are to be confirmed with your accountant before you rely on the file.

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- **Enter your VAT number in Discogs.** In your seller settings on Discogs, enter the shop's VAT number. Discogs then charges its fee without VAT (reverse charge); without it, Discogs adds 20 % French VAT to the fee, which a shop can hardly recover in practice (see Discogs' Tax Policy). ShopForge books the whole fee on the fees account, so any VAT Discogs added stays inside it.

Related

- Integrations — connect the account and set the channel
- Products — a product's Discogs lines and single publishing
- Orders — Discogs orders, their messages and cancelling

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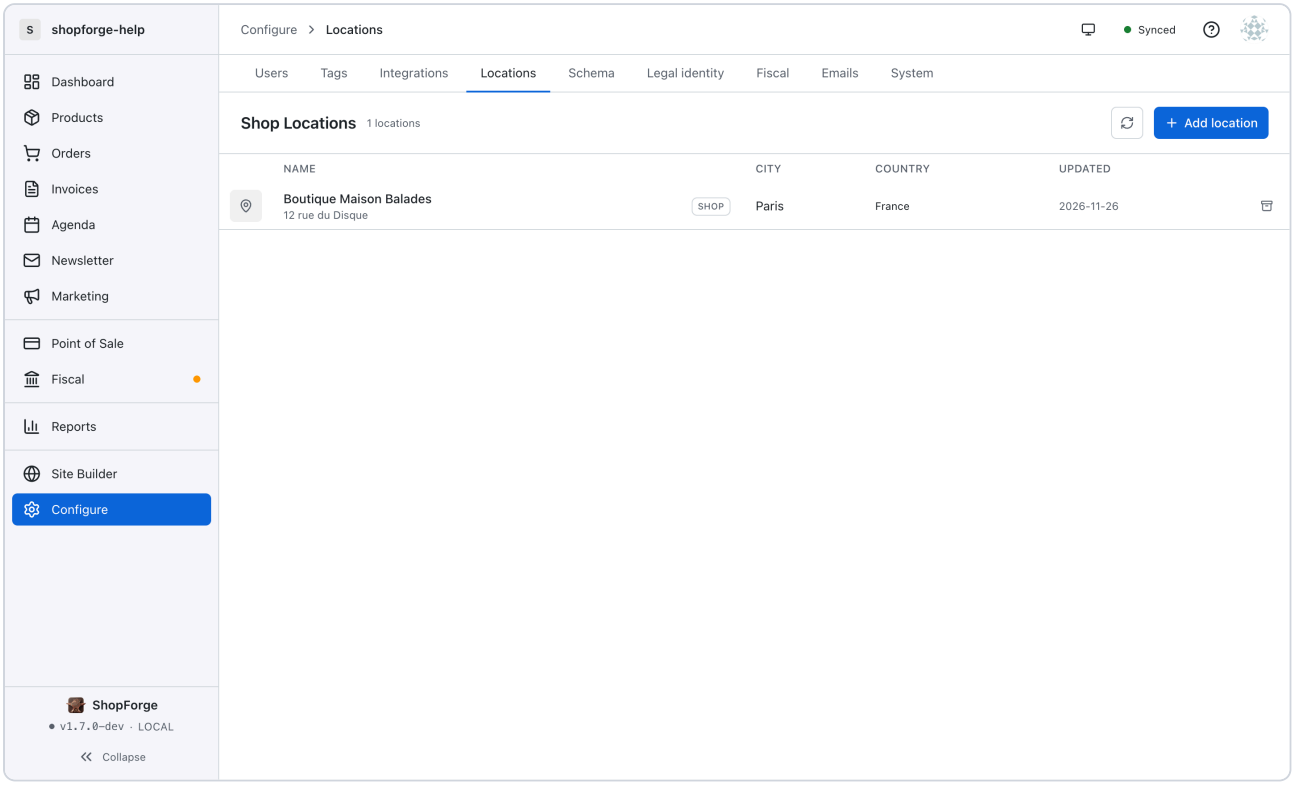
Shop Locations



Locations are your physical shop locations and warehouses, and the Pro Client and Outside Walls locations your registers sell at away from a shop. Shops back the addresses used on the storefront (footer address columns, the Addresses section) and elsewhere in the shop. Manage them from **Configure → Locations** — a tab only administrators can open.

Locations follow the offline-first model: the list runs against the **local copy**, and writes are queued and synced in the background.

The locations list

The **Locations** tab offers **Add location** and **Refresh**. Columns: Name, City, Country and Updated; the type, **Default** and **Inactive** show as badges beside the name, and the last column holds the **Deactivate** / **Reactivate** button.

Each row is marked with its type (**Shop**, **Pro Client** or **Outside Walls**), the default location with **Default**, and a deactivated one with **Inactive**. Click a row to edit it. The row's action is **Deactivate** (not offered on the default location), or **Reactivate** for an inactive location: a location is never deleted (see Deactivate or reactivate a location).

A shop can have up to **10 active shops** and **10 active Pro Client and Outside Walls locations** together. Inactive locations count toward neither: "The maximum number of active locations is reached. Deactivate another one first."

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Location types

A location is one of three types, chosen when you create it:

- **Shop** — a physical shop or warehouse, with its address and opening hours. Its receipts carry its own address as the seller's.
- **Pro Client** — the register sells at a professional client's premises.
- **Outside Walls** — the register sells elsewhere: a fair, a market, a festival.

Pro Client and **Outside Walls** are till types with a name and a country, nothing else. They are generic and reusable — one Outside Walls location serves every fair; you don't need one per agenda entry or per client.

- A Pro Client or Outside Walls location is in the **default shop's country**, which must have fiscal settings. Its receipts name the **default shop** as the seller, so the seller's address is always in the country the sale is taxed in.
- It never appears on the storefront, for pickup or in the agenda; it is offered only when a register opens a session.
- It cannot be the default location, and it cannot be created before the shop has a default shop: "Create a shop and make it the default before a till type."
- A sale at an **Outside Walls** location may come with a refund guarantee for the customer: see **Cash drawer** in System. A sale at a **Pro Client** location never does: the buyer is a professional.

The type cannot be changed once the location exists.

Add or edit a location

Fields:

- **Type** — **Shop**, **Pro Client** or **Outside Walls** (see Location types). Shown but fixed when you edit a location.
- **Name** — for example "Main Store", or "Salon du disque" for a fair.
- **Street address** and **Address line 2** (apt, suite...).
- **City**, **Postal code** and **Country**.
- **Phone** and **Email** — optional contact details.

For a Pro Client or Outside Walls location the form shows only the **Name**, and the **Country** as read-only text: the default shop's. There is no address, map, contact, opening hours or **Set as default**. **Create** stays disabled, with the reason, when the location cannot be created: no default shop yet, the default shop's country has no fiscal settings ("{country} has no fiscal settings. Set them in Configure → Fiscal → French VAT and business day first."), or the limit of active locations of its kind is reached.

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As you type a street address, the **map preview** in the editor finds it so you can check it before saving. Once the location details are saved, a confirmation message is displayed: "Location saved".

Opening hours

Under the address, the **Opening hours** section holds the location's weekly hours and a note. Both are shown under the location's address on the storefront: in the footer's **Addresses** column and in the **Addresses** section.

- **Set opening hours** — turn it on to enter hours; every day starts closed. Turn it off and save to remove the hours.
- One row per day, Monday to Sunday. Tick **Open** to open a day (it starts at 10:00–19:00), then set the times. A day can have up to **3 ranges**, for example 11:00–13:00 and 14:00–19:00 for a lunch break: use the **+** button to add a range and the bin to remove one.
- The copy button on a row copies that day's hours to **every day**; then untick the days that are closed.
- **Note** — up to 200 characters, for holidays and exceptions ("Closed 10–20 August", "By appointment"). The note stays available even without hours.

Times are 24-hour, in the shop's own time. A range must close after it opens, and two ranges of the same day must not overlap: the row shows the problem and **Save** stays disabled until it is fixed. Ranges crossing midnight are not supported.

On the storefront, consecutive days with the same hours are grouped, for example "Tue – Sat 11:00–13:00, 14:00–19:00" and "Sun – Mon Closed". The published site shows the hours at the next **Publish site**; the Site Builder preview shows them at once. To hide them, turn off **Show opening hours** on the footer column or the section in the Site builder.

Default location

The **Set as default** action promotes a location to the shop's default; the confirmation reads "Default location changed". This action can only be done when editing an existing location. Setting the default is applied directly online rather than through the offline queue.

The default is always an active shop: a Pro Client, an Outside Walls or an inactive location cannot be made the default. The default shop cannot move to another country (by making a shop abroad the default, or by changing its own country) while an active Pro Client or Outside Walls location is in its country: deactivate those first.

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Deactivate or reactivate a location

A location is never deleted: its name and id stay on the receipts and reports that name it for the life of the shop. Instead, **Deactivate** it from its row or its editor, and confirm: "{name}" will no longer be offered at the register, on the site, for pickup or in the agenda. It is kept with its receipts and reports, and you can reactivate it at any time.

A shop cannot be deactivated while published or upcoming agenda entries are held in it: "This shop has agenda entries in it. Move or delete them first." Past and cancelled entries do not block it.

An inactive location stays in the list, marked **Inactive**, and every document that names it keeps naming it. **Reactivate** brings it back.

Deactivate is not offered on the default location: make another shop the default first. Deactivation is also refused while a cash session is still open there, on any register: "A cash session is still open at this location. Close it and close the day, then deactivate the location."

Reactivation is refused past the limit of active locations, and for a Pro Client or Outside Walls location that is no longer in the default shop's country or whose country has no fiscal settings.

Deactivating and reactivating are applied directly online, so a refusal shows at once.

Related

- Site builder — the Address section uses your locations
- Point of sale — choosing the location when opening the register

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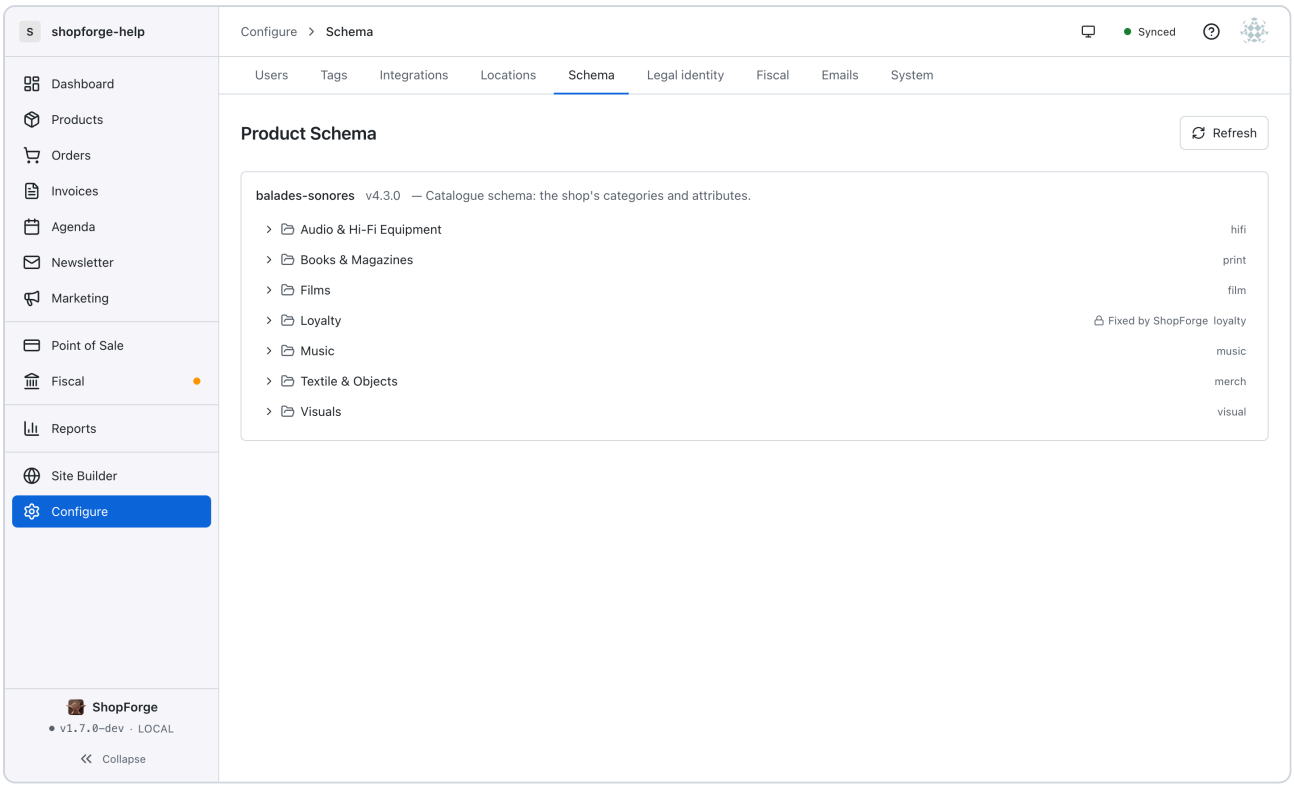
Product Schema



The **Schema** tab (Configure → Schema, administrators only; employees see the tab disabled) shows, read-only, the product schema that defines your **product categories and attributes**. It is the backbone the product form and the catalog rely on: category-specific fields come from here.

What a schema is

A schema is a single JSON document describing a tree of categories, each with its own attributes. Each attribute applies to a **Product** or **Variant** scope and can be marked **Searchable** (indexed).

The list of an enum attribute may hold the reserved entry `allow_empty`. It gives the attribute an empty choice: the product form offers **Please select** first, and choosing it saves no value. The entry is never a value: it is not stored, not shown by name and not accepted from a product. An enum needs at least one real value besides it, may hold it once, and the `values` of an enum or a `tags` attribute must be a non-empty list. The entry is refused in a `tags` list and in a standard attribute such as `condition`. The server checks these rules when a schema is set, and refuses a schema that breaks them. Changing the entry changes the drop-down and the starting value of products created afterwards; it never changes a value a product already holds.

A category with no sub-category (a leaf) can carry the flag `hasEcoParticipation`. It marks equipment that is electrical or electronic, such as a turntable, an amplifier or speakers. The

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product form shows the **Eco-participation** field only for a new product in such a category, and the server refuses an eco-participation on a product in any other category. The flag is off by default, is set on leaves only (a schema that sets it on a category that has sub-categories is refused) and is never inherited. In the tab, a marked category shows a small **Eco-participation** tag beside its key. The platform team sets the flag in the schema file; the app has no screen for it.

If no schema has been configured on the server, the tab indicates "No product schema imported yet."

Viewing the schema

Once a schema is loaded on the server, the tab displays the active structure as a read-only table of attributes:

- **Name**
- **Type**
- **Scope** (Product or Variant)
- **Searchable**
- **Values**

For an enum that holds `allow_empty`, the **Values** column lists the real values only, followed by the **Empty allowed** marker. The marker is not a value.

Changes to the schema are made by the platform team, not in the app. The tab has no import or upload button.

Related

- Products — the product form shows category-specific attributes defined by the schema

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Fiscal settings

Fiscal settings define the currency, the locale, the VAT configuration and the signing keys behind every fiscal receipt and underpin compliance with the French ISCA conditions (art. 286, I-3° bis CGI) when you sell through the till. The values are legally significant: **once a register opens the first cash session in a country, that country's settings are locked** for the whole shop (a training session counts too), and every later change requires a manager (admin user) approval. Each change is recorded in the JET journal of the register where it is made (signed), in the server's journal, and in the journal of every other register when it receives it (a register that is offline receives it at its next sync).

Reach the page via **Configure → Fiscal** — administrators only.

The six tabs

The page is split into six tabs, listed down the left side under three headings: **Till (France)**, **Online sales (EU)** and **Both**. The headings are not tabs and cannot be clicked. Under the list, **Legal identity** is a link to the Legal identity page. The address of the page names the tab (`/configure/fiscal/distance-sale` , for example), so a link opens it directly.

Heading	Tab	What it holds
Till (France)	**French VAT and business day**	The country list and the locked, versioned settings behind it.
	Registers	The registers: their signing keys, retiring a register and training mode.
Online sales (EU)	**Distance-sale VAT**	The OSS switch, the EU sales position, the rates of the other EU countries and the accounts of the distance sales: VAT on distance sales.
Both	**Invoicing**	The invoicing settings.
	Accounting	The **Accountant** (the email the month-end report is sent to) first, then the accounting accounts, among them **Donations received**, where the donations are credited (account 758200 until you change it), and **Unallocated payments (suspense account)**, where a payment that pays no order is booked (471100 until you change it; see Orders).

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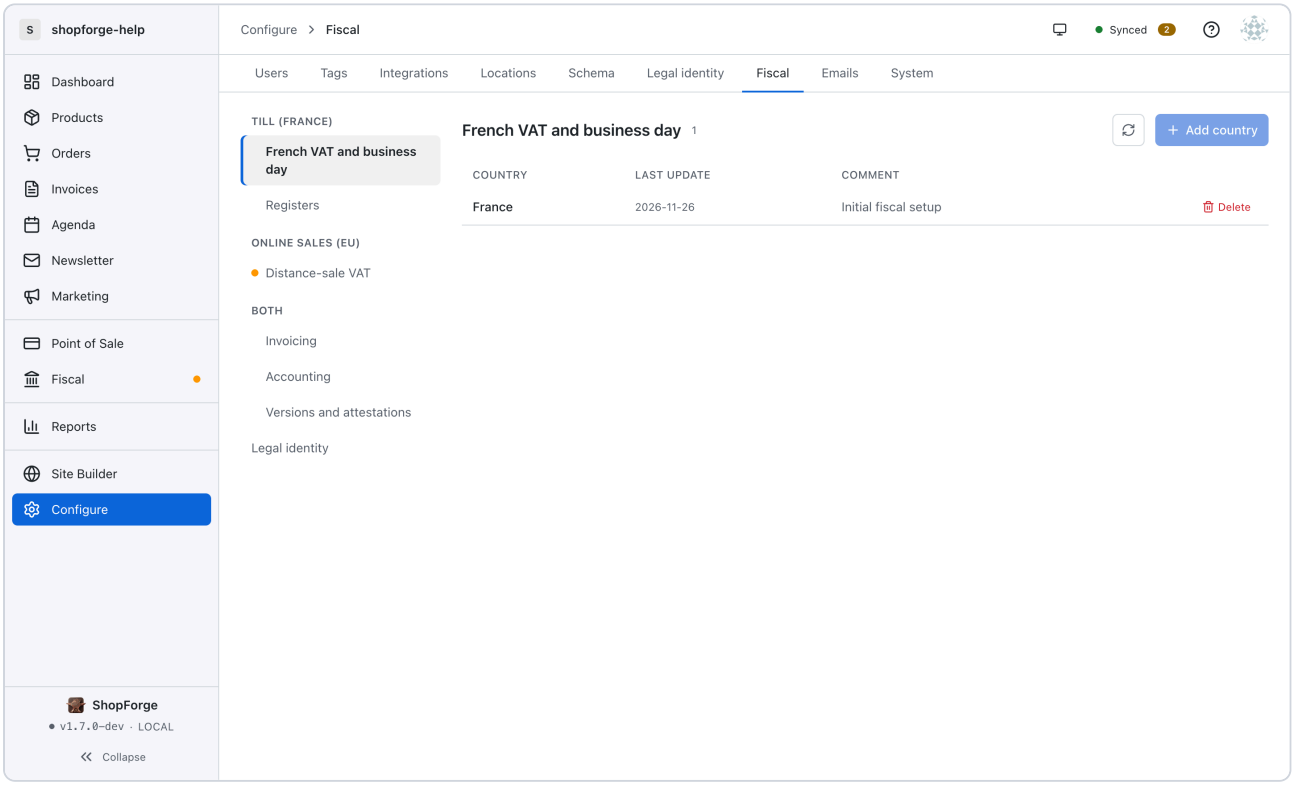
Heading	Tab	What it holds
	Versions and attestations	The versions of this register and the attestations.

The **Distance-sale VAT** tab can carry a dot. **Red**: the €10,000 mark is passed and the shop is not registered for the OSS. **Amber**: something needs your attention, namely a country whose rates are not checked, new default rates to accept, or 80 % of the mark reached while the switch is off. No dot: nothing to do. Screen readers read the tab as "Distance-sale VAT, needs attention".

Versions of this register

In the **Versions and attestations** tab, a read-only block shows which software this register runs and the attestation that covers it. The register reads these values from itself, with no connection needed: the **application version**, the **fiscal major version** and **fiscal fingerprint**, the **editor's attestation** published by the publisher, Mihai MANUTA EI (Kapïdé) (its fiscal major version, signing date and signatory, and whether it covers this version), the **build manifest** (the fingerprint of the program files as released, and whether the files on this computer still match it) and the **published anchor** (whether that manifest matches the entry the publisher published for this version). They are the same values as the **Technical details** of **Software** in Fiscal → Inspection.

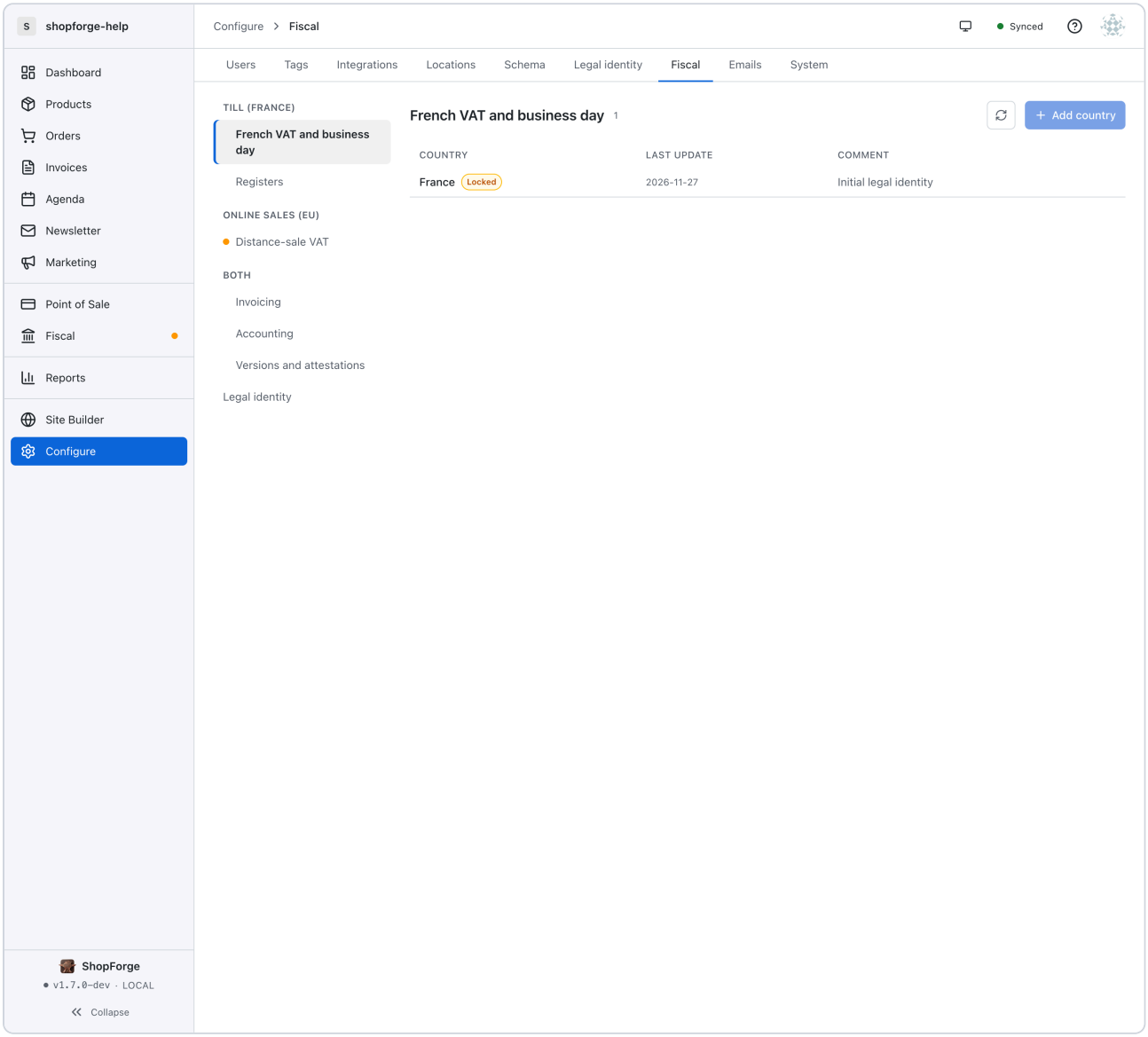
Country list



The tab's heading is **French VAT and business day**. One set of settings per country. France (`FRA`) is the only supported country today. Each row shows the country, the last update and a comment describing the latest change:

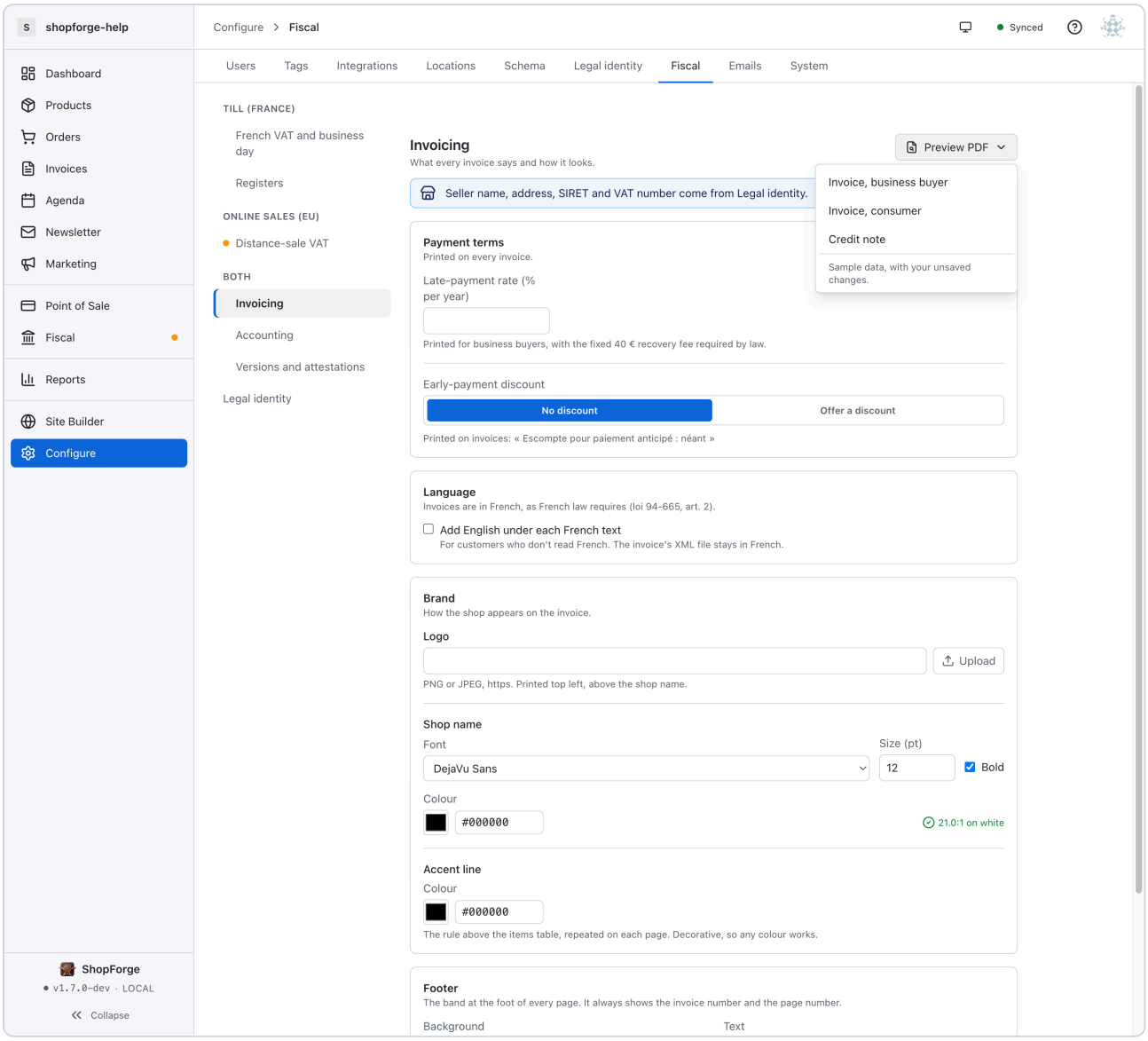
- **Locked** badge: a register has opened a cash session in this country (this register or another one: the lock reaches every register when it syncs); changes need a manager approval. An unlocked country (no cash session opened there yet, still safe to edit freely) shows no badge in its row. In the edit window the badge reads **Locked — Manager approval required** or **Unlocked — No fiscal records yet**.

Click a row to edit its settings. An unlocked country can be deleted: click **Delete**, then **Confirm?** (administrators only). A locked country has no **Delete** button and cannot be deleted; change it with a change description instead.



Invoicing

The **Invoicing** tab sets what every invoice and credit note says and how it looks (administrators only). The seller's name, address, SIRET and VAT number are not here: a row at the top says they come from Legal identity, with an **Edit** link. The section is four boxes and a bar at the bottom: "N unsaved changes. Applies to the next invoice; issued PDFs never change." with **Discard** (puts back the saved values) and **Save** (one Save, for the whole section). An invoice that is already issued is never drawn again.



Payment terms

- **Late-payment rate (% per year)**: a percentage from 0 to 100. It is printed for business buyers, with the fixed 40 € recovery fee required by law (the fee is not a setting).

- **Early-payment discount**: choose **No discount** and invoices print « Escompte pour paiement anticipé : néant ». Choose **Offer a discount** and type the **Terms** (up to 300 characters, with a counter; give the rate and the deadline): they follow the fixed text « Escompte pour paiement anticipé : », and the line "Printed on invoices: « ... »" shows the exact sentence as you type it. The fixed text and « néant » stay in French, as printed on the invoice.

Language

Every invoice and credit note is in French, whatever the shop's language, as French law requires: "Invoices are in French, as French law requires (loi 94-665, art. 2)." Tick **Add English under each French text** for customers who don't read French. It is off by default, and it applies to invoices issued after you save. A credit note is in the same language as its invoice.

With English on, the invoice adds the English beside the French, and the French always comes first:

- each short label reads French, then English: « FACTURE / INVOICE », « Date d'émission / Issue date », « Total TTC / Total incl. VAT »;
- each heading of the items and VAT tables has its English under it, in smaller type;
- each mention that has an English text (the late-payment penalty, the 40 € fee, the legal guarantee, the nature of the operation, the gift card and exemption reasons, the paid mention) is followed by its English on the next line.

Some things stay in French only:

- your seller block (name, legal form, capital, address, SIREN, VAT number);
- the VAT column of the items table (« Exonéré », « marge »);
- the early-payment sentence and the « Régime particulier – Biens d'occasion » and VAT-on-debits mentions.

Amounts and dates keep the French format (`1 234,50 €`, `20/11/2026`). The invoice's XML file (Factur-X) is in French with English on or off.

Brand

- **Logo**: a field and an **Upload** button, a PNG or JPEG at an https address. It is printed top left, above the shop name.
- **Shop name**: the **Font** (DejaVu Sans, DejaVu Serif or Playfair Display), the **Size (pt)** from 10 to 24 and **Bold**, on one line, then the **Colour** (a swatch and a hex field). The colour must read on white: the result is shown on the right of the field ("13.9:1 on white"), at least 3:1 is required.
- **Accent line**: its own **Colour**, any colour. It is the rule above the items table, drawn again at the top of the table on each page.

Footer

The band at the foot of every page always shows the invoice number and the page number.

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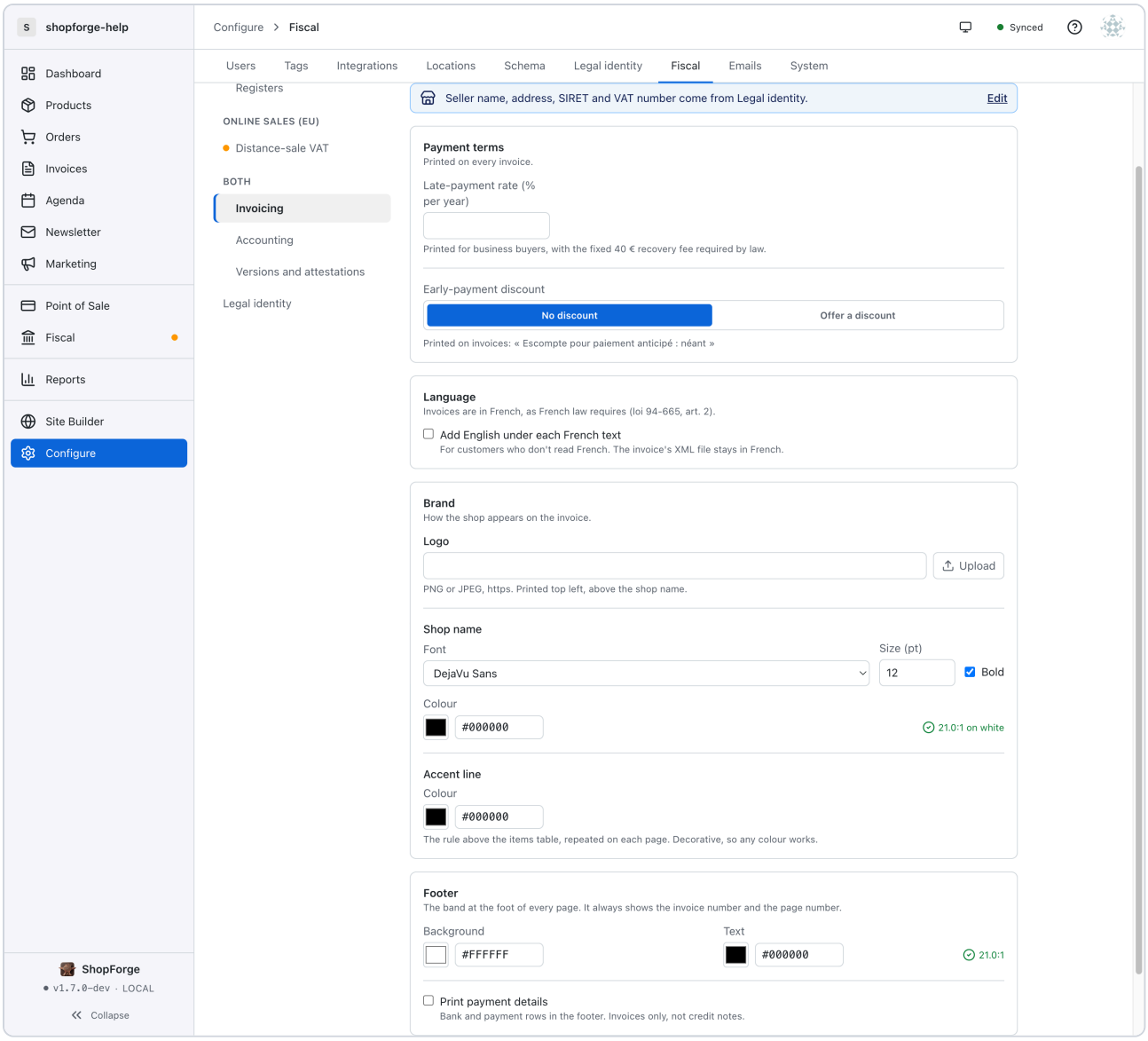

- **Background** and **Text** colours, on one line; the result of the text colour is shown on its right and must be at least 4.5:1. They apply even when the payment details are off.
- **Print payment details**: on invoices only, never on credit notes. Then the **Title** and the **rows**, each a **Label** (up to 40 characters) and a **Value** (up to 100), both required, up to 6 rows ("3 of 6 rows"). Reorder them by dragging the handle, or with the arrow keys on the handle, or with **Move up** and **Move down**: they are printed in this order. **Add row** adds one and **Remove** takes one away.

Preview PDF

The **Preview PDF** button at the top right of the section opens a menu: **Invoice, business buyer**, **Invoice, consumer** and **Credit note**. Each opens a sample document, with "Sample data, with your unsaved changes.": your current values, saved or not, in French and with English beside it when **Add English under each French text** is ticked, so you can check the result before you save. The business sample shows the late-payment penalty and the 40 € fee, and the credit note has no payment details. If a value is refused, the preview names it, as **Save** would.

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Create or edit settings

1. Click **Add country** (or a row to edit an existing one: the window is titled **French VAT and business day — France**).
2. In the create dialog, choose the country.
3. Fill the currency and locale and the VAT rates. The SIRET and the VAT number are not typed here: see Legal identity.
4. Write a change description.
5. Click **Save settings**.

On save the window says "Saved as version {version}. Journal entry {id}.": the saved version and the identifier of the journal entry created for the change.

Seller identity

The shop's legal identity — SIRET, VAT number, legal name, legal form, share capital, registered office and VAT regime — is **not typed in this window**. It is set once, in Legal identity, and read by the receipt, the closure documents, the delivery slip and the invoice. In this window a line reads "The shop's legal identity is set in Legal identity." and links there.

What this window keeps for the till:

- **Currency** — EUR, GBP or CHF. Once the settings are locked it is read-only, with the reason: "The currency can't change once the settings are locked: the totals of the closures have no currency of their own." The till and the server both refuse a change of currency on locked settings, even with a manager's approval, so choose it before the first cash session. Every other setting still changes after the lock.
- **Locale** — the receipt locale: `fr-FR`, `en-GB` or `de-DE`.
- **Key rotation (hours)** — how often the signing key is rotated, 1–24 h. This drives compliance signing; a shorter interval increases the number of signing keys, not the legal standing.

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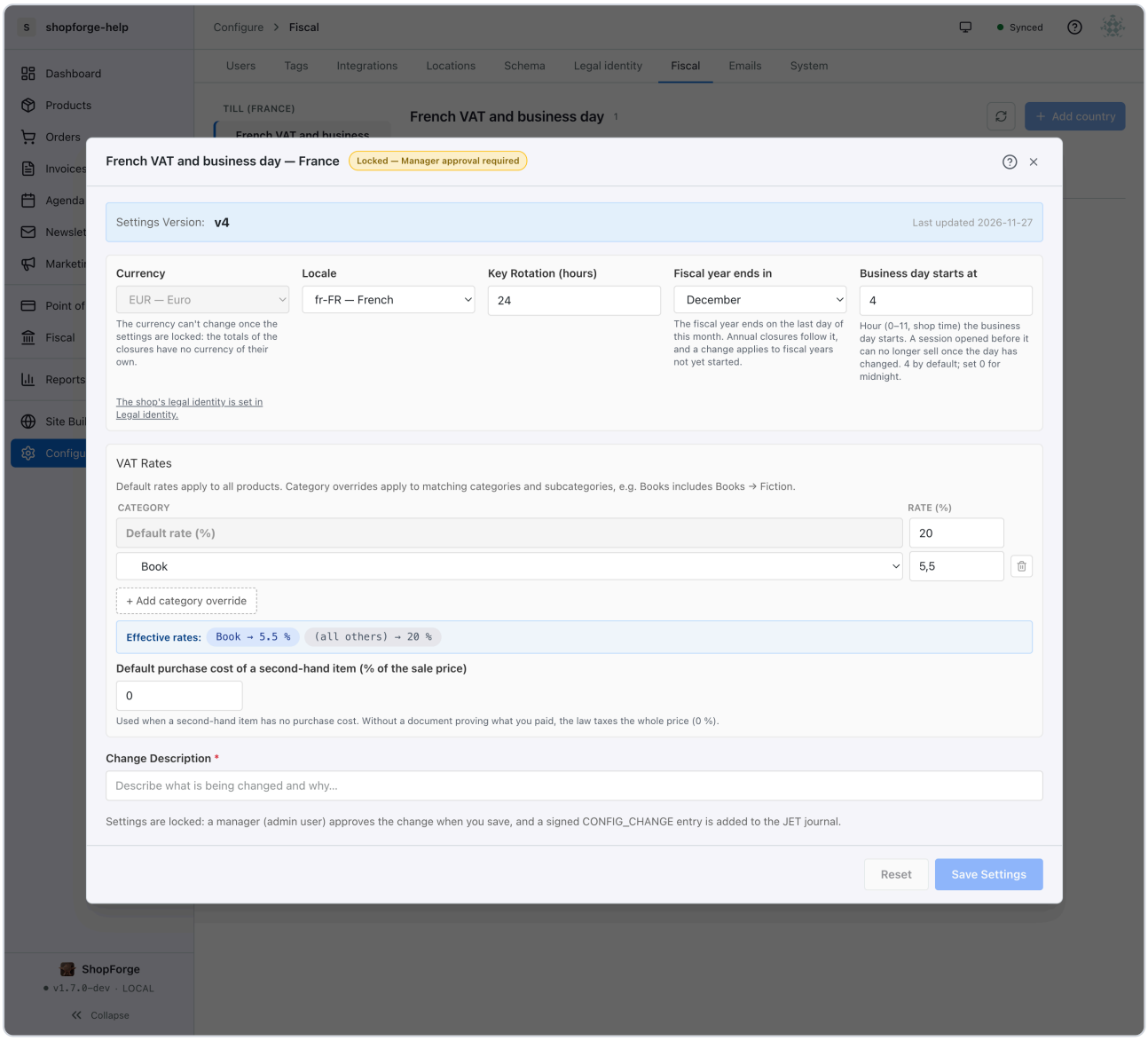

VAT rates

- **Default rate (%)** applies to every product that has no specific rate. The rates are typed in the **Rate (%)** column.
- **Per-category overrides** assign a specific rate to a category; the rule applies to the category and its sub-categories. Choose a category from your imported schema and a rate.
- The **effective rates** preview at the bottom summarises the resolution order: the most specific matching category wins, everything else falls back to the default.
- **A donation has no rate.** It is outside the scope of VAT, at the till and online, so there is nothing to set for it: an entry for the Donation category here changes nothing.
- **A gift card has no rate either.** A card is a multi-purpose voucher, its VAT is due when it is spent, so its sale is outside the VAT rows, at the till and online: an entry for the Gift cards category here changes nothing, and none is needed.

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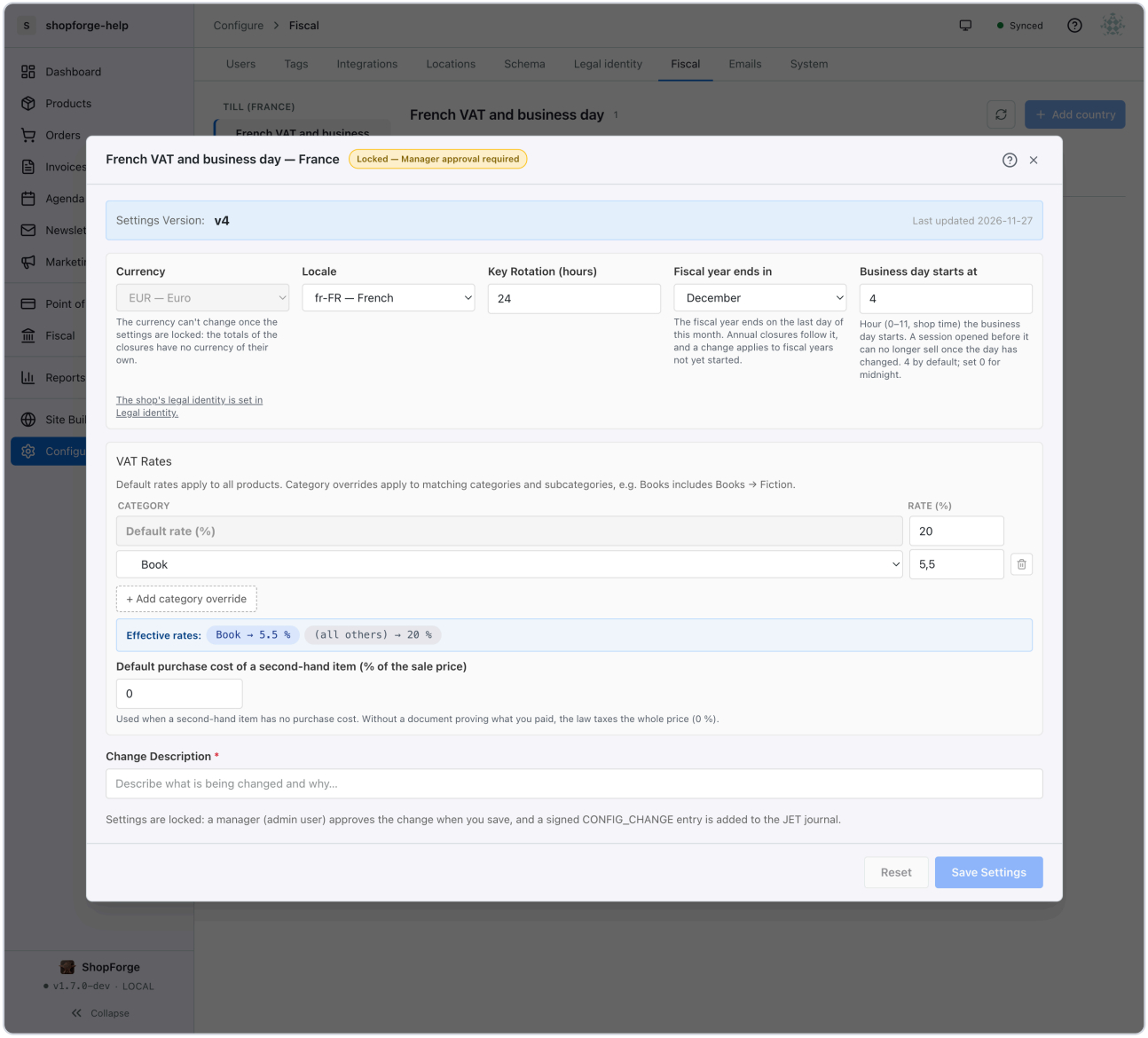
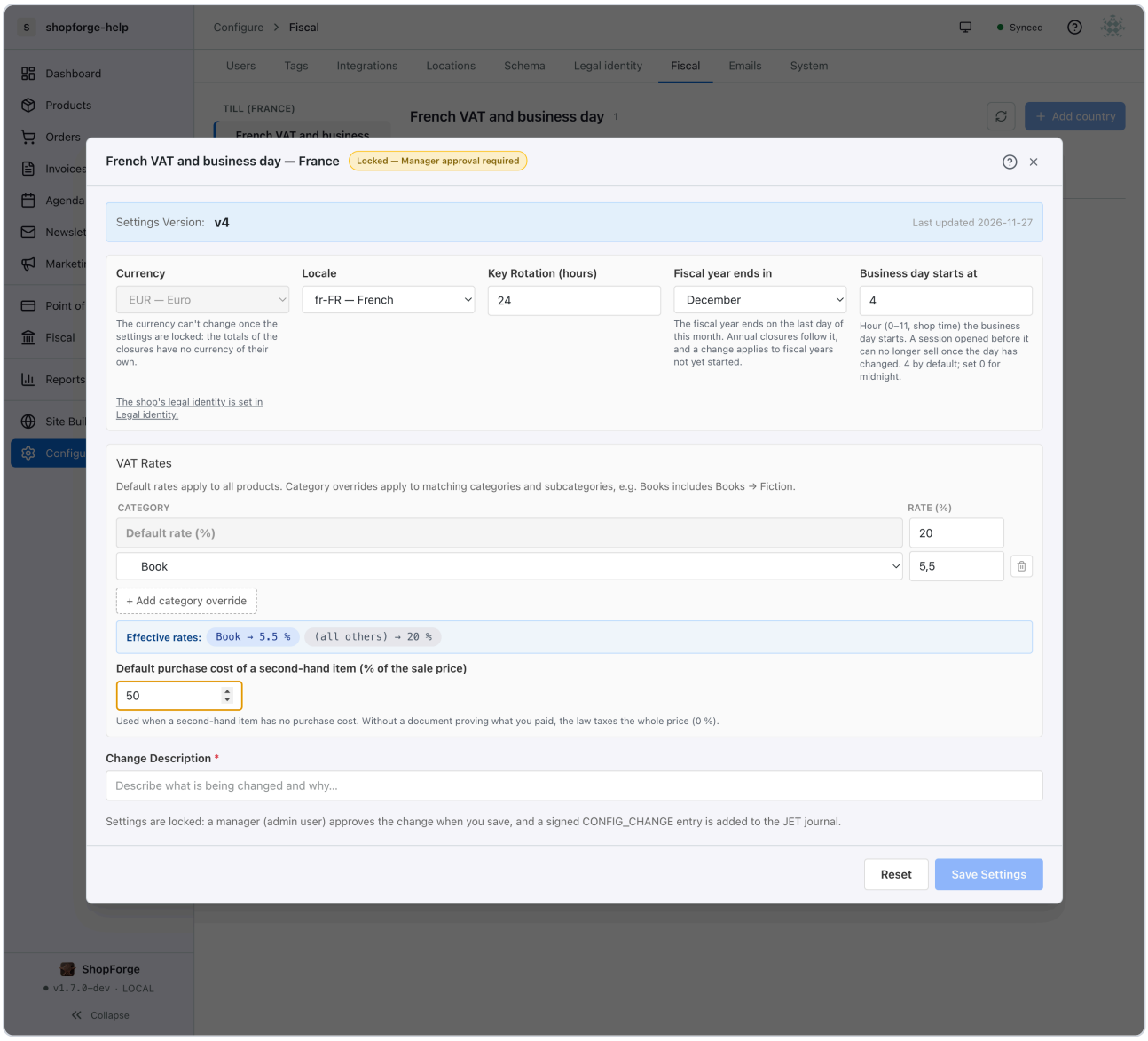
- **Default purchase cost of a second-hand item (% of the sale price)**, under the rates: the cost used for a second-hand copy that has no purchase cost, as a whole percentage of its sale price, from 0 to 100. At 50 %, a copy sold 30.00 € has a cost of 15.00 €, and its VAT is on the 15.00 € margin; at 0 %, the default, VAT is on the whole price. Without a document proving what you paid, the law taxes the whole price (0 %). It is read when the sale is made, at the till, online and on Discogs, for every store of the shop: a new percentage applies to the next sales only, and a sale already made keeps its cost. Outside 0 to 100, or with decimals, the screen shows "Enter a whole number from 0 to 100." and the settings cannot be saved. See Suppliers for the cost of each copy.





If no categories are defined, import the product taxonomy first (**Configure → Schema**), then return here.

VAT on distance sales

The **Distance-sale VAT** tab decides how the shop's **online orders** (the shop, orders you enter, Discogs) are taxed when they are delivered to another EU country or outside the EU. It does not touch the till. Unlike the settings of the first tab it is **not locked** by the first cash session and needs no manager approval: you can change it at any time, and it applies to the orders placed afterwards.

Since 1 July 2021, a shop selling to consumers in other EU countries charges the French VAT as long as those sales stay **under €10,000 excluding VAT a year**, all channels together. Above that mark it must charge the VAT of the **destination country**, declared through the *one-stop shop* (OSS, in French « guichet unique »). The tab keeps count for you and holds the settings that follow. From top to bottom:

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- **The warning**, only when the mark is passed and the shop is not registered (see The warning).
- **The best-effort banner**, always: "Best-effort rates. ShopForge proposes these rates from public sources and updates them about once a month. They can be wrong or out of date. The source is the European Commission's Taxes in Europe Database (TEDB). You must check them before relying on them."
- **The new-defaults banner**, only when ShopForge offers new default rates: "New defaults, in force since {date}: {n} changes." A proposal is offered only from its start date, and it never overwrites your values: your checked values stay until you open the country and save. Orders created in the meantime keep the former rate, and the banner stays until the proposal is accepted.
- **The card "Registration and threshold"**, with a chip that reads **Below threshold** or **Threshold crossed**. It holds the next three items. Its footer has **Save** and, once saved, "Saved by {name} on {date}"; the switch is never saved by a click alone.
- **Registered for the OSS.** Turn the switch on **only once the shop is registered** for the OSS with the tax office, then choose **Save**. While it is off, an order above the mark is still taxed at the French rate. The hint says that, below the mark, the French rate applies to every consumer order to another EU country.
- **EU distance sales**: a bar that fills towards the €10,000 mark, and under it "This year, ex-VAT: ..." and "last year: ...". The bar shows this year's figure and is full once it reaches the mark; it turns red when the warning above is shown. "€10,000 threshold" is followed by the link **Recalculate**, which counts the orders again if you want to check the figure; the figure is worked out from the orders, never typed. From 80 % of the mark, while it is not passed and the switch is off, a line says "You have reached ... of €10,000 of EU distance sales. Check the shop's OSS registration before it is crossed."
- **The card "Destination rates".** The chips read "27 destinations" (the EU countries other than France, and **XI · Northern Ireland**, part of the EU VAT area for goods at the UK rate: a UK address whose postcode starts with BT) and "{n} of 27 not checked". The table is read-only, with three columns: **Country**, **Effective rates** (equal rates are grouped in one pill, for example "Books, Comics → 7 %"; the standard rate of the country is the grey "(all others)" pill) and **Status**: a green **Checked** chip followed by the name and the date, an amber **Not checked** chip, or an amber **New default** chip while ShopForge offers new default rates for a country you have checked. Click a row to open the country. Under the table, a line such as *Check these categories for Germany.* lists the categories that have a reduced rate in France and that the country may tax differently.
- **The card "Accounts"**, at the end of the tab: the accounting accounts of the distance sales, **EU distance sales (OSS)** (707830 until you change it), **Intra-community supplies** (707810), **Exports** (707820) and, for each country, the **OSS VAT due** (a sub-account of 4458 per country). The accounts of the French sales are in the **Accounting** tab. These defaults are to confirm with your accountant.

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The Global Z's accounting export and the monthly export's `account` column use these accounts, by the treatment each online line was signed with:

Online line	Its sale goes to	Its VAT goes to
Sold under the OSS	**EU distance sales (OSS)**	the **OSS VAT due** of its country
Intra-community supply	**Intra-community supplies**	none (0 %)
Export, a second-hand item included	**Exports**	none (0 %)
French VAT	the accounts of the **Accounting** tab, by rate and scheme	the same

The delivery fee goes with the goods, and a refund goes to the row of its own sale. A second-hand item of a sale under the OSS or an intra-community supply stays on the margin accounts of the **Accounting** tab. An OSS country with no **OSS VAT due** account goes to the unmapped account, as « Non rapproché : TVA OSS {country} ». The accounts are read when the export is made, so a change applies to every export you make afterwards, even of a past month; changing one is written in the journal, and the export's answer and the monthly README name when the accounts were last saved (`default` while they never were).

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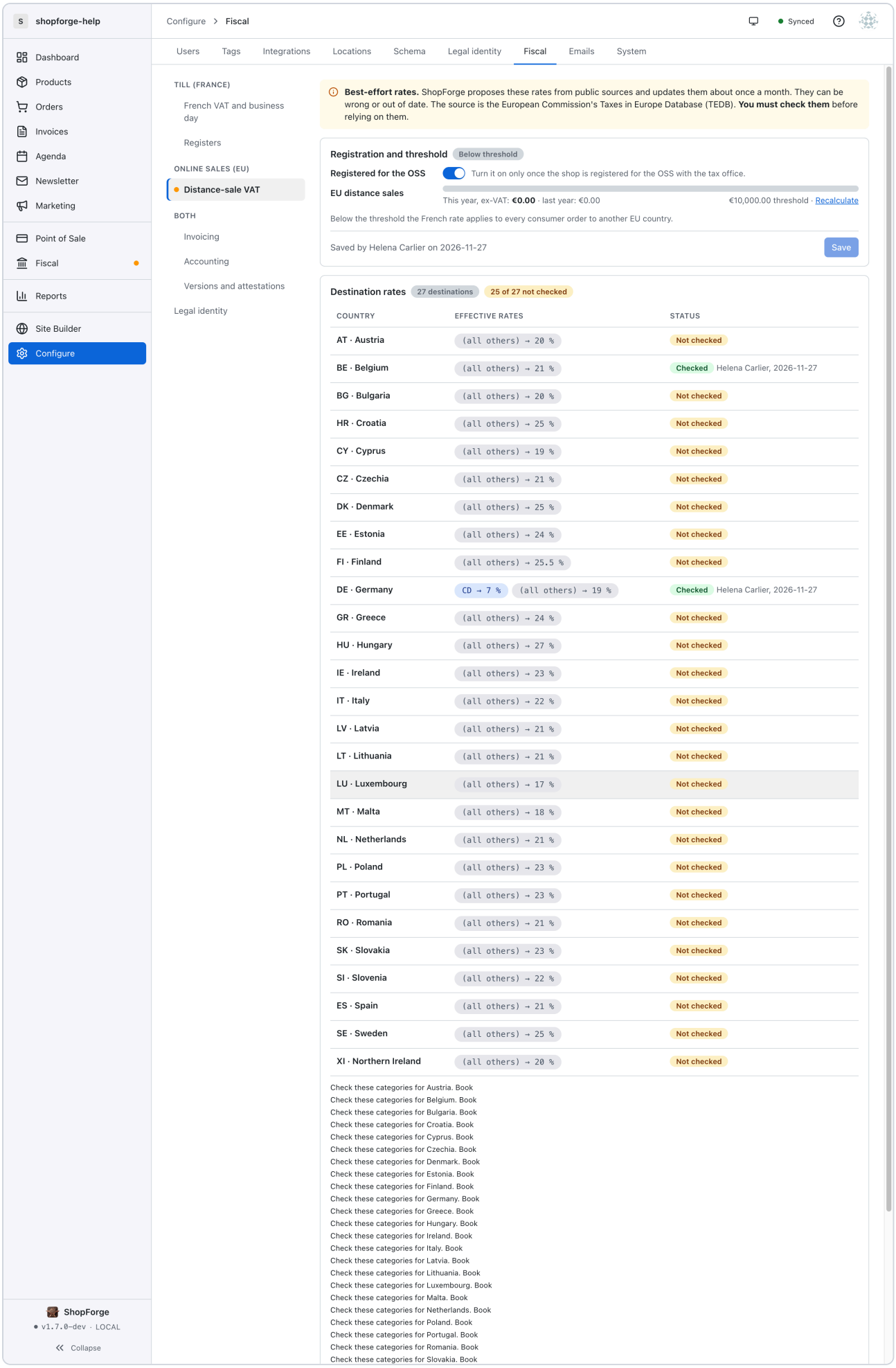
shopforge-help
Dashboard
Products
Orders
Invoices
Agenda
Newsletter
Marketing
Point of Sale
Fiscal
Reports
Site Builder
Configure
ShopForge
v1.7.0-dev · LOCAL
Collapse
Configure > Fiscal
Synced
Users
Tags
Integrations
Locations
Schema
Legal identity
Fiscal
Emails
System
TILL (FRANCE)
French VAT and business day
Registers
ONLINE SALES (EU)
Distance-sale VAT
BOTH
Invoicing
Accounting
Versions and attestations
Legal identity
Best-effort rates. ShopForge proposes these rates from public sources and updates them about once a month. They can be wrong or out of date. The source is the European Commission's Taxes in Europe Database (TEDB). You must check them before relying on them.
Registration and threshold
Below threshold
Registered for the OSS
Turn it on only once the shop is registered for the OSS with the tax office.
EU distance sales
This year, ex-VAT: €0.00 · last year: €0.00
€10,000.00 threshold · Recalculate
Below the threshold the French rate applies to every consumer order to another EU country.
Saved by Helena Carlier on 2026-11-27
Save
Destination rates
27 destinations
25 of 27 not checked
COUNTRY
EFFECTIVE RATES
STATUS
AT · Austria
(all others) → 20 %
Not checked
BE · Belgium
(all others) → 21 %
Checked
Helena Carlier, 2026-11-27
BG · Bulgaria
(all others) → 20 %
Not checked
HR · Croatia
(all others) → 25 %
Not checked
CY · Cyprus
(all others) → 19 %
Not checked
CZ · Czechia
(all others) → 21 %
Not checked
DK · Denmark
(all others) → 25 %
Not checked
EE · Estonia
(all others) → 24 %
Not checked
FI · Finland
(all others) → 25.5 %
Not checked
DE · Germany
CD → 7 %
(all others) → 19 %
Checked
Helena Carlier, 2026-11-27
GR · Greece
(all others) → 24 %
Not checked
HU · Hungary
(all others) → 27 %
Not checked
IE · Ireland
(all others) → 23 %
Not checked
IT · Italy
(all others) → 22 %
Not checked
LV · Latvia
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LT · Lithuania
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Check these categories for Romania. Book
Check these categories for Slovakia. Book

The rates are best-effort defaults, not a table you can rely on without looking: you are responsible for checking them against the official table of each country, with your accountant.

Checking a country's rates

Click the country's row. The window **Rates for {country}** holds the **standard rate (%)**, one row per category with a reduced rate (**Add a category...** adds one, from the categories of your imported schema) and the effective-rates preview. Under them, the box:

> I have checked these rates against the official table of {country}. ShopForge records your name and the date.

Tick it, then save: the row then reads *Checked by {your name}, {date}*. Changing a rate and saving clears the check until the box is ticked again, and a country you leave alone keeps its check. When ShopForge offers new default rates for the country, the window shows them with your value struck through and the date they are in force since: **Save** takes the proposed values and **Cancel** keeps yours.

These rates are saved on their own. They are not the shop's French rates, so this window asks for no reason and no manager approval, and it is not signed in the journal. The French rates of the first tab keep their own window and their own rules, unchanged.

The warning

When the mark is passed and the shop is **not** registered, the tab (with a red dot) and the **Orders** list show this banner:

> The shop's EU distance sales have passed €10,000 and it is not registered for the OSS. These orders are still taxed at the French rate, but their VAT is due in the destination country. Register for the OSS (guichet unique) on impots.gouv.fr, then turn the switch on, and ask your accountant about the invoices already issued.

Those orders carry the flag *OSS not registered* (see VAT of an online order). The banner goes away once the switch is on, which is to say once the shop is registered. The invoices already issued stay as they are: the VAT printed on an invoice is due by whoever issued it, so the shop may owe both the French VAT it invoiced and the destination country's. Ask your accountant.

Rate not checked on an order

An order delivered to a country whose rates are **not checked**, once the shop is registered and over the mark, carries the flag *Rate not checked for {country}.*, shown on the order and as a **Rate not checked** pill in the **Orders** list. It informs and never blocks the order or the invoice, and the

invoice prints nothing about it. It is set when the order is created and stays on it: ticking the box afterwards does not clear it.

Fiscal year end

Fiscal year ends in sets the month your fiscal year ends in: you choose a month only, and the fiscal year ends on that month's last day. Annual closures follow it. The default is December.

- **Before the first cash session**, a change applies to every fiscal year, so set it when you first configure the country.
- **Afterwards**, a change never alters a fiscal year that has already started. It applies from the first day of the next fiscal year, and the form says so before you save: "The fiscal year in progress ends on .... From ..., the fiscal year ends on the last day of ...". The first fiscal year under the new end runs from that day to the first occurrence of the new end, so it can be shorter than twelve months. For example, changing December to June on 15 March: the year in progress still ends on 31 December, and the next one runs from 1 January to 30 June.
- Saving again before the new end applies replaces the pending change. Setting the end back to the current one cancels it.
- A change that would apply inside a fiscal year that already has an annual closure is refused: "This change cannot be made: it would apply from ..., inside a fiscal year that already has an annual closure."

Like every fiscal-settings change, it needs a change description and, once the settings are locked, a manager's approval.

When the server refuses it

The register checks the change with what it knows. When it reaches the server at its next sync, the server checks it again with its own data, the annual closures of every register included, and can refuse it. The sync indicator then lists the change under **Pending changes**, failed, with one of these:

- "The server refused the new fiscal year end: it would apply to a fiscal year that already has an annual closure. It did not take effect on the server. Ask an administrator to check the fiscal settings." — another register has already closed the fiscal year the change would apply to.
- "The server refused the fiscal year end this register sent: its schedule is not the one the server works out. It did not take effect on the server." — this register worked out the date the new end applies from differently, usually because it saved the change offline without the latest settings.
- "The server refused the fiscal year end this register sent: a fiscal year ends on the last day of a month. It did not take effect on the server." — the change named a day that is not a month's last. **Fiscal year ends in** offers months only, so the change was not made with it.

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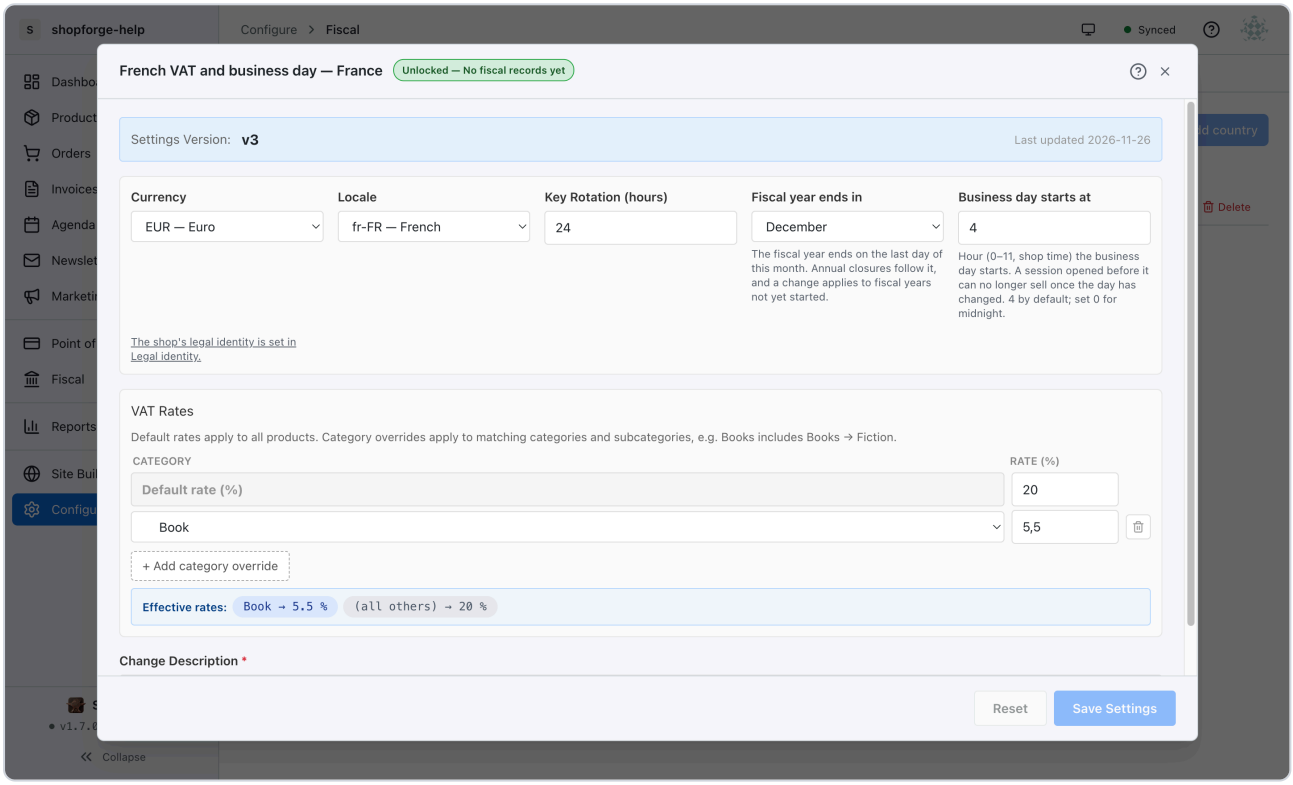
The server's fiscal year end is the one that holds, and the register receives it with its next sync. **Retry 1 failed mutation** sends the same change again and is refused again. An administrator, on a register that is online and synced:

1. Opens **Configure → Fiscal → French VAT and business day** and checks **Fiscal year ends in**: it shows the end the server kept.
2. If a change is still wanted, saves it again there: the form says from when it applies, or refuses it at once if it would apply inside a closed fiscal year.

Business day



Business day starts at is the hour (0 to 11, shop time) at which a new business day begins. The default is 4, so a sale at 01:00 still belongs to the previous business day; set 0 for midnight, or a later hour for a shop that trades late. A session opened before that hour can no longer sell once the day has changed: the register asks the cashier to close it and open a new one (see Point of sale). The hour also decides which earlier days still owe a daily closure (see POS offline settings).

A change applies to sessions opened after it; a session keeps the hour it was opened with. Like every fiscal-settings change, it needs a change description and, once the settings are locked, a manager's approval.

Change description

Required on every save. Explain what changed and why; the text is stored with the change and shown as the row comment in the settings list, so it doubles as an audit trail for staff who inspect the list later.

Manager approval

Once a country is locked, saving still requires a **manager approval**:

1. **Manager** — choose the approving manager (an admin user).
2. **PIN** (also works offline) or **Password** (checked by the server, so it needs a connection).
3. **Reason** — the reason for the configuration change.

Then click **Approve**.

Submitting creates a signed *Configuration changed* entry in the JET journal with before/after hashes, bumps the settings version, and historical receipts retain the exact settings version they were issued under. The server records the change in its own journal (*Fiscal settings changed on the server*), and every other register journals it as a signed *Configuration changed* entry when it receives it. A register that receives it while it isn't set up as a register yet, or while restoring its data from the server, journals it once it is set up or the restore is done.

> Legal note: do not reduce the signing-key rotation or weaken a rate once the settings are locked without confirming the change against the product minimums. The system checks only that the key rotation stays between 1 and 24 hours: it does not block any other reduction.

Training mode

A **Fiscal Admin** can turn on training mode for this register from **Configure → Fiscal → Registers** — a simulation mode for training new staff or demos. It is per register, not per shop: turning it on here does not affect other registers.

- Only available while **no cash session is open** on this register (a session is entirely real or entirely training).
- Turning it on asks for a **reason** (training a new employee, demo, test, or other) and an optional note, then **re-enter your PIN or password** — the same re-authentication a manager uses elsewhere.
- While it is on, every screen shows an amber **"TRAINING MODE — FICTITIOUS"** banner, and every document produced carries a FACTICE watermark. Sales made in this mode are signed and kept like any other record, but excluded from totals and reports. The cash put in or taken out of the drawer during a training session is not on the real Z report either.

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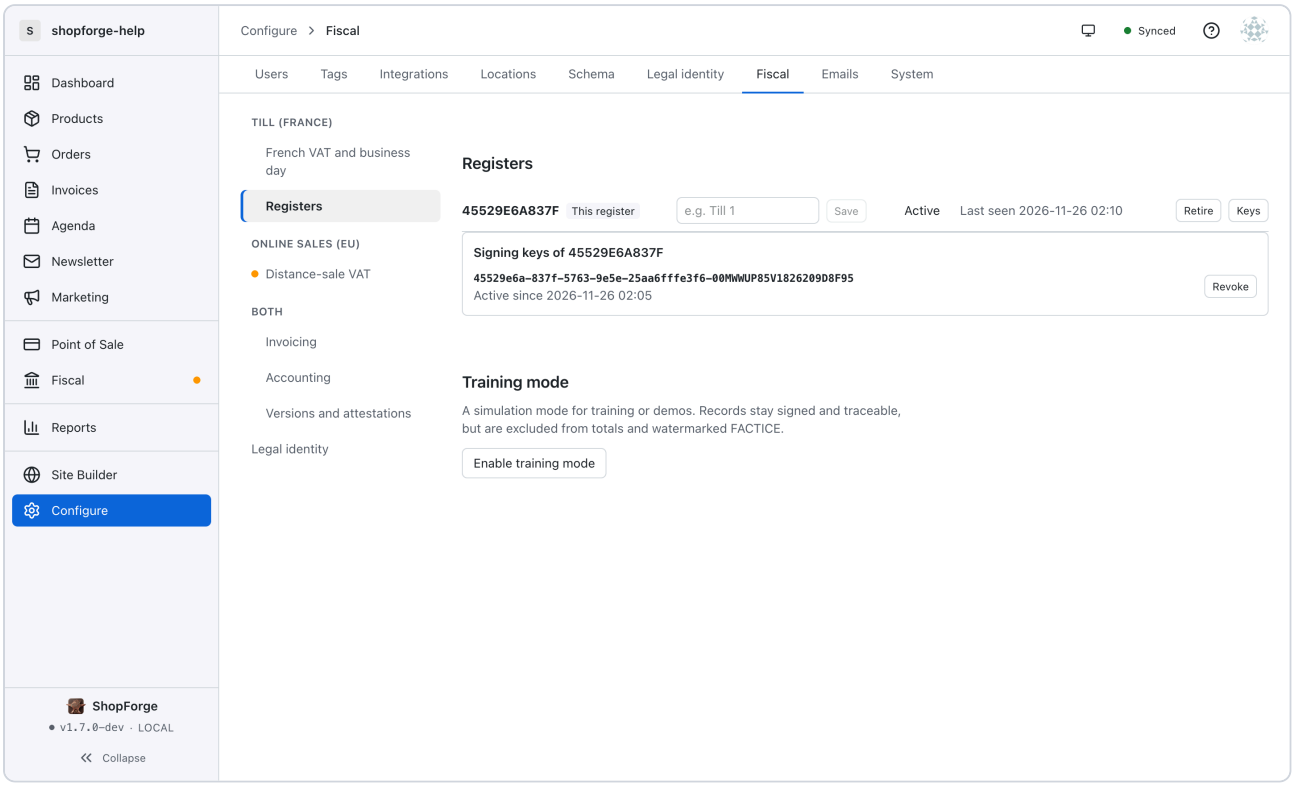
- Turning it off needs no reason, only re-authentication, and again only while no session is open.

Signing keys



Each register signs its fiscal records with its own key. When a key is compromised, or a register is lost, you can cut it off from **Configure → Fiscal → Registers**: click **Keys** on the register's row. The list shows every key of that register:

- **Active since** *date* — the key in use. **Revoke** cuts it off.
- **Revoked on** *date* — with the last sequence the server accepted for each chain (the cut-off).
- **n records waiting · highest sequence** *n* — records the register signed with that key after the cut-off, while it was offline. The server holds them; they are not lost.
- **Held records accepted on** *date*, **through sequence** *n* — you accepted them.

Revoke a key. Click **Revoke**, give a reason (1 to 500 characters) and confirm. The records the server already holds stay valid. The chain is cut at its head as the server holds it now: records the register signed with this key and has not yet sent, and any it signs later, are held until an administrator accepts them. Cash drawer movements are the exception: numbered per cash session, they have no cut-off, so any the register signs with the revoked key and sends after the revocation is refused. It cannot be undone. A revoked key signs nothing new: a new key is registered for the register from an administrator's session. The page confirms "Key revoked."

Accept held records. Click **Accept held records** on a revoked key. The dialog shows how many records are held and the highest sequence for each chain. Read them, give a reason and

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confirm. This covers only the records listed now: anything the key signs later is held until you accept again. Accepted records are marked as accepted by an administrator, and the verifier reports them as accepted, not as verified ("N attested by an administrator" in the **Chain integrity** check of the back office; the standalone verifier says "N attested"). An accepted record does not break the chain: it is late by design, so its place among the register's keys is not checked; its signature and its link in the chain still are. Then, on the register, sign in as an administrator and click **Drain now**: the held records leave the waiting count. The page confirms "Held records accepted." The server accepts what it holds at the moment you confirm, so a record that arrived after the dialog opened is accepted too; the page then says so ("More records had arrived since the dialog opened than it listed: they are accepted too.").

On the register, the sync indicator tells you when records wait for this: "n records waiting for an administrator: signing key *key id* was revoked. Sign in as an administrator, then in Configure → Fiscal → Registers → Keys choose Accept held records, then Drain now." Its **Open Registers** link opens the **Registers** tab.

These actions need a connection to the server; offline, the list says "Signing keys need a connection to the server." Only administrators see them.

Identity conflict and a forked chain

In **Configure → Fiscal → Registers**, a register can carry the badge **Identity conflict**. It means the server saw that register's identity used by a second copy of the app or on another machine. For a copied data folder, a disk image or a reinstall on the same machine, that is within ten minutes; the server also raises it when a new machine shows up with no install signature, or when a short code or a regenerated identity collides at registration, with no time window. The badge stays on the row; a line under the table repeats what it means. It does not stop the register: it is a signal. Check that only one copy of the app runs on that register.

If two copies signed records, the chains **fork**: the server holds one signed record for a sequence and is offered another. It refuses the second one and keeps it aside for the auditors, and the register's later records wait behind it. The sync indicator shows it under **Pending changes**, in this order:

1. First: "n fiscal records of this register wait behind a refused one: retry the refused record first. If it is refused again, contact an administrator." Click **Resend the refused fiscal records in order**.
2. If the server refuses the record again as a conflict: "n fiscal records of this register wait behind one the server refused as a conflict. An administrator must replace this register." An administrator sees the button **Replace this register** under the message.

Accept held records does not clear a fork: it only accepts what a revoked key signed. The resend cannot fill a sequence the server already holds. The way out is to replace the register,

which declares the sales the server refused by date to the consolidated closure and archives the old ledger first. Click **Replace this register** under the message in the sync indicator, on the register itself, signed in as an administrator, with a connection to the server: it closes this register's identity and starts a new register that replaces it, and the current ledger stays, archived, as evidence. The same button is on the register's screen when it is blocked on a broken chain. The Registers list itself has only **Retire** and **Keys**. Until it is done, the refused records stay in the register's data folder; do not erase it.

Retire a register

When a register is taken out of service for good, retire it from **Configure → Fiscal → Registers**: click **Retire** on the register's row. Only administrators see the button, and only on a register that is still active. **ONLINE**, the server's register that signs the web shop and Discogs sales (see The online register), is in the list too, with no **Retire** and no **Keys**: it is not a till, and it is never offered to close on another register's behalf.

1. Choose the **Register that closes on its behalf**: another active register, which will produce the closures and close the cash sessions the retired one leaves open, and take over those of any register the retired one was closing for. If no other register is active, the window says so: set up another one first.
2. Give a **Reason** (required, 1 to 500 characters).
3. Read the confirmation, which names both registers, and click **Retire register**.

It cannot be undone. The retired register can no longer sell, and its totals are frozen. When it is done, the page shows "Register *code* is retired. Frozen perpetual total: *amount*." The register stays in the list as *Retired*, and its records stay in the server's copy and in the archives. If the register was already retired or replaced in the meantime, the window says so and the list is refreshed. If the register chosen to close on its behalf is no longer active, choose another one.

This action needs a connection to the server.

Attestations

Two attestations belong to the register's compliance file.

- **Editor's attestation (part 1).** The publisher's own declaration that the software conforms, signed by Mihai MANUTA EI (Kapïdé), the publisher of ShopForge, for each fiscal major version. The back office does not generate it: it is published by the publisher and shipped with the app, so it opens offline from the **Editor's attestation** button of **Proof of compliance**, in Fiscal → Inspection (see Fiscal). Every employee can also open it from **About ShopForge** in the user menu. When none is published for this version, the section says "No editor attestation has been published yet."

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- **Your attestation (part 2).** The second part (« volet 2 ») of the tax administration's model attestation, which you complete, sign and file here. In it, your legal representative (or you, as a sole trader) certifies having acquired or downloaded ShopForge from its publisher, Mihai MANUTA EI (Kapïdé), and using it to record customers' payments since a given date.

  1. Fill in the Legal identity first: the pre-fill reads your legal name, whether you are a sole trader, your SIRET and VAT number from it. A company reads « Je soussigné, ..., représentant légal de la société {name} », with a blank for the representative's name. A sole trader signs in their own name, never as « représentant légal »: « Je soussigné, {name}, entrepreneur individuel (EI), SIREN {SIREN} », the SIREN being the first nine digits of the SIRET, and the signature line reads « Signature : ».
  2. In **Configure → Fiscal → Versions and attestations**, open the panel **Your attestation** and click **Generate pre-fill**. The app writes a PDF with the model's text, word for word, filled in with your name, the publisher and the date of first use, and under it a **References** block: your shop's name, SIRET, VAT number, the address of the default location, the software and fiscal major versions, the distributor and the licence reference. **Show in folder** opens it.
  3. Print it and complete the blanks by hand: the legal representative's name (for a company), the date you acquired ShopForge, the place and the date (and the date of first use, when the app doesn't know it). Sign it, then use **Upload the signed copy** → **Choose signed PDF...**. The panel then reads "Uploaded {date} (recorded under fiscal major {n})".

The date of first use comes from the server, or, when you are offline, from this install's first fiscal record. Each upload is recorded in the journal and the signed copy is kept. A register that has not been online since the upload does not have the copy yet: open Configure → Fiscal while online to fetch it. Once it has it, it is added to the archives.

Monthly export for the accountant

The accountant can ask for the rows behind the month's totals: one row per sale line, per refund line and per delivery fee, for the till, the web shop and Discogs. It is a file you download, apart from the Global Z report, and it signs nothing.

Where: Fiscal → Closures → Periods (administrators, online). At the top of the view, the box **Monthly export of every transaction** has a **Month** field and a **Download** button. The field offers the last ended month; a month still running cannot be chosen. It works for any ended month, including a month in which only the web shop sold.

What you get: a zip with three files. Amounts are in cents, except the amounts of `payment_split` (below), which are in euros.

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- `transactions.csv`: one row per line, with the date, the receipt or invoice number, the product and its category, the amounts without VAT, the VAT and with VAT, the VAT rate and scheme (second-hand goods under the margin scheme show their purchase cost and margin), the destination country of a distance sale, the payment method, where the buyer is and the accounting account. `buyer_zone` says it by the buyer's delivery address: `france` (a till sale, a pickup in a shop, France, Monaco), `eu` (another EU country, and Northern Ireland) or `extra_eu` (everywhere else, French overseas departments and territories included). When a sale was paid with several methods, the payment method reads `mixed` and `payment_split` gives how much was paid with what, in the order paid, for example `cash 20.00; card 14.00`; it is empty on every other row. Refunds, avoirs and cancellations are negative rows. Every row is marked `signed`: it copies a line of a signed record, the till's or the online register's (ONLINE), which signs the web and Discogs sales. A donation row, at the till or online, has the scheme `outside_scope`, no VAT rate and no VAT base, and its account is **Donations received**.
- `payments.csv`: the parts of each payment, net of change given, so a split payment is listed per method. A correction of the payment methods of a sale appears there too, as an `adjustment` row.
- `README.txt`: the month, the Global Z version it matches and its hash (once the Global Z has been produced), the accounting mapping version, when the file was exported, and a hash of each table.

The totals without VAT, the VAT and the totals with VAT of the till, web and Discogs rows, per VAT rate and scheme, add up to the month's Global Z, leaving aside the rows where `late` is `true`. Those are till records signed after their register had closed that day: the Global Z leaves them out. Run again with nothing changed, the two tables, and their hashes in the README, stay the same; the export time in the README is new each time. A late web capture or a change of the accounting accounts changes the rows.

Messages:

- **The month waits for the closure of: …** A register that traded during the month (a sale, or only a cash session) has not closed it yet. The message names the register: close the month on it (End of day), or, for a replaced register, have its successor close it on its behalf; then download again.
- **The daily reports of this month do not add up to the monthly report: a day is missing or out of date. Produce the daily reports first.** Produce the missing or outdated daily reports in the Periods view, then download again.
- **The month is too large for one file: N files downloaded, one per period.** The month did not fit in one file, so it was cut into periods of days and each period downloaded as its own zip, named with its dates (and the channel, when a single day was cut by channel). If every file arrived, nothing is missing: open them together. If the download stopped on an error, the files already saved are only part of the month.

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- **This period is too large for one file, even by channel: contact support.** A single day is too large even when cut by channel. The files already saved are only part of the month: do not send them as the whole month. Contact support.
- **Internal Server Error.** The export stops, and no file is made, when it meets a sale or a refund it cannot read (a record that cannot be read, a refund of an ONLINE sale whose order cannot be read, or a refund line its sale does not hold): it never skips one, so the totals stay right. The screen gives only this general message; the server's log names the record. Contact support, and tell them the month.

The month-end email carries the Global Z report and its accounting export, not this transactions file: send it by hand.

Related

- Point of sale — Z report, JET journal and the auditor export.
- Legal identity — the SIRET, the VAT number and the rest of the shop's legal identity.
- Schema — draft — import the category taxonomy used by the VAT overrides.

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Fiscal

Fiscal is the administrators' entry for everything the tax authorities and the accountant ask of the shop. It sits in the sidebar under **Point of sale**, and only an administrator sees it: an employee who opens a Fiscal address is sent to the dashboard. It has four tabs, **Overview**, **Closures**, **Accounting** and **Inspection**. The settings (rates, registers, attestations) stay in Configure → Fiscal.

When something on the Overview needs you, the entry carries a dot, and a screen reader says "Fiscal, 2 things need you".

What an employee keeps. An employee never needs this entry:

- the closures this register owes, and **Verify this register**, in **End of day** (see Verify this register);
- **About ShopForge**, in the user menu: the version line, the editor's attestation, your attestation and the fiscal administration manual (see Getting help).

Building an archive and requesting the evidence dossier are for administrators only.

Overview

The first tab answers one question: *does anything need me?* It opens with a verdict:

- **Nothing needs you.** appears only when every line below was measured and none needs you. It says nothing about the shop being compliant, only that nothing on this page asks for you.
- **2 things need you.** counts the lines that **Need you**.
- **Some lines could not be measured: see why below.** appears instead when a line is **Can't tell** and no other line needs you.

The round arrow at the right of the verdict reads everything again.

Below it, two columns, each line a card with one of three states: **In order**, **Needs you**, or **Can't tell** (with its reason). *Can't tell* is never good news: the screen could not measure that line. Offline, everything the server works out reads **Can't tell: needs a connection**.

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- **Shop till** has six lines:
  - **Closures**: the closures the registers owe, and the Global Z reports waiting for registers or ready to produce.
  - **Records**: the fiscal records of this register. It needs you when records are held (refused, waiting for an administrator, or waiting behind a refused one: open the sync status at the top of the window) or have waited more than 24 hours to be sent. While they are simply on their way it is in order: "4 records are being sent."
  - **Integrity**: the registers' chains. It needs you when a chain is broken. In order, it says when this register's chains were last verified in full: "Verified 08:12.", with the date as well on another day. **Verify now** first verifies this register's chains in full and records the check in the journal, in your name, as the daily check does; a break it finds is recorded as one found by any other check. Then the server checks every register's chains, one after the other, as **Verify all registers** does in Closures. The line then says "Verified" with the time of that check, or needs you when a chain is broken. Offline, **Verify now** checks this register only: the line stays *Can't tell* and says "This register was verified at 14:03; the other registers need a connection."
  - **Archives and storage**: the free disk space of this computer and how long it lasts (see This register), and the archives ShopForge keeps: a row per period whose archive is missing or appears twice, and *Can't tell: archives waiting to be sent* while one isn't stored yet (see Archives kept by ShopForge).
  - **Software and attestations**: the program files are the editor's, the editor's attestation covers this version, and your own attestation is uploaded. "Your attestation is not uploaded." comes with **Open Configure → Fiscal**, where you upload it; "No copy of your attestation on this register" is a *Can't tell*.
  - **Exceptions**: journal events to acknowledge, reminders from the server and conditions on this computer (the offline limit passed, for example), as Closures → Exceptions lists them.
- Under a line that needs you, one row per **cause**, worst first: a broken chain (the only red on the screen), overdue closures, pending closures, periods waiting or ready to produce, exceptions to acknowledge, reminders from the server, the storage warning. A row names **every** register concerned and always says how many: for a closure, **1 closed · 2 missing: Counter 3, Counter 7 · 1 not verified: Mobile 1 / 4**. A register counts as *closed* for a day only if it owes nothing, or if its oldest owed period is later; a register that still owes an earlier period has not been measured for this one, so it is named under *not verified*, never counted as closed. When the names are long they are cut after about three lines — the count is still written — and **Show the 14 registers** opens the whole list in place. A replaced or retired register waiting for a closure on its behalf comes first. A line shows eight rows; **Show 3 more** shows the rest.

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- Each row has its own button, to where its detail is: **Go to the End of day tab** goes to Point of sale → End of day; **See the period**, **See the registers**, **See this register** and **Acknowledge…** open that view of Closures. A line with causes has no link of its own to another screen.
- **Online sales** has three cards:
  - **EU sales threshold**: over €10,000 of EU distance sales and not registered for the OSS; at 80 % of it; or below it, or registered.
  - **Destination VAT rates**: "3 countries to check." or "Every destination rate is checked.". **Open Distance-sale VAT** goes to Configure → Fiscal → Distance-sale VAT.
  - **Orders and invoices**, read from the orders on this computer. It needs you when an order has its VAT to check (its VAT treatment says **OSS not registered**, **VAT number not checked** or **Rate not checked**: see VAT of an online order), or when a paid order still has no invoice 7 days after it last changed, although its invoice was due ("2 orders have their VAT to check.", "1 paid order still has no invoice after 7 days."). ShopForge issues an invoice within a day of the order becoming due, so one still missing after 7 days needs a look. **See the orders** opens Orders on **VAT or invoice to check** (see Flags in the list). Offline it says **Can't tell**, like the other online cards.

Coming up closes the page: the date the month closes on each register (the registers close it by themselves from the 1st), and the end of the fiscal year, with its annual closure and its yearly archive. Dates follow the language and the date format you chose in your preferences.

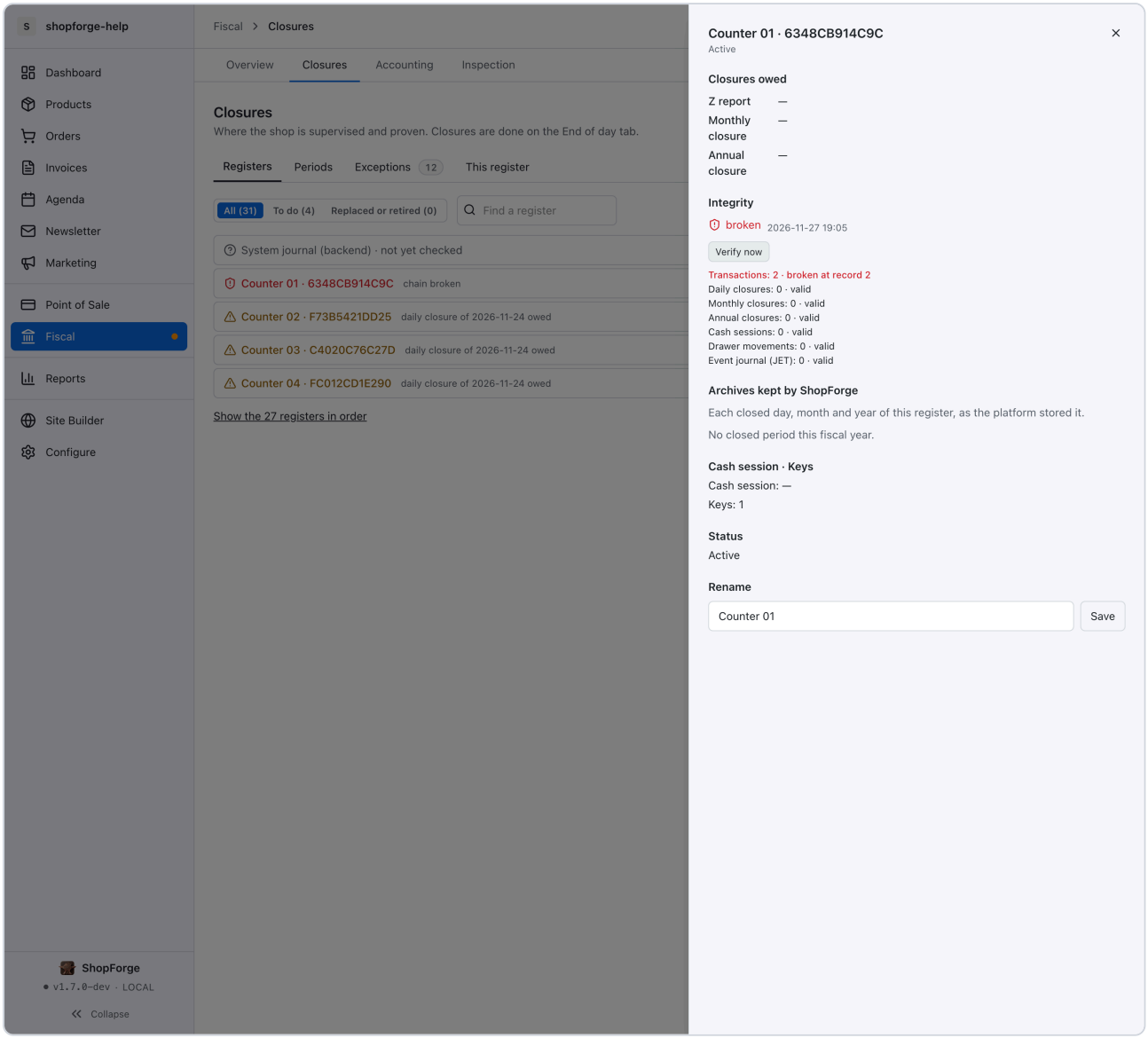
Closures

The **Closures** tab is where the shop is *supervised and proven*; closures themselves are done on the till, in the **End of day** tab of Point of sale. The monthly and annual closures are made by the register itself, once the month or the fiscal year has ended by the shop's business day, after it has sent everything it signed and been quiet for 5 minutes: nobody has to press a button, and a register signs nothing while a check holds the closure back (the till says which, in words). Such a closure is marked as automatic in what the register signs, and its document says « Clôturée automatiquement par la caisse » ("Closed automatically by the register") where a closure made by a person names who made it. The daily Z report stays a person's act, because it needs a cash count. What stays the shop's: make each day's Z report, close the cash sessions and let the register sync, so that the checks pass. It has four views, in tabs across the top: **Registers**, **Periods**, **Exceptions** and **This register**, and opens on Registers. A tab carries a number when something in it needs you. It is the former Closure Center of Point of sale, with the same views and the same actions; what its To do list said is now under the Overview's lines.

On the dashboard, the **POS Sales** widget shows a red badge with the number of open exceptions to an administrator who is online; it opens Closures → Exceptions.

Registers

One line per register, problems first (a broken chain, then a closure owed, then a register not verified), then the registers in order. Replaced and retired registers are listed too. **All**, **To do** and **Replaced or retired** filter the list. From 9 registers a search box (**Find a register**) appears and the registers in order are folded behind **Show the 12 registers in order**. The system journal chain is listed as **System journal (backend)**.



Click a register to open its panel:

- **Closures owed** — the oldest closure it owes at each level, and what to do about it: for a register this one may close for (it replaced it, it was chosen to close on its behalf, or it took that over from a register that was itself replaced or retired since) a **Close on its behalf** button takes you to the **End of day** tab; for another replaced or retired register it says which registers may close for it, that none is designated, or that this is not known when the register list could not be read; an active register closes its own. A **reminder** appears when a closure is more than 1 day (daily), 5 days (monthly) or 30 days (annual) past its period. These are reminders chosen by ShopForge, **not regulatory deadlines**: a closure without a reminder is not thereby on time. To close, go to the **End of day** tab.

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- **Integrity** — the last check the server made, and **Verify now**, which checks the seven chains of this register one after the other and shows each result as it arrives. A chain that cannot be checked is named and the others carry on.
- **Cash session · Keys** — whether a cash session is open on it and how many signing keys it holds. These are read when you open the panel.
- **Status** — active, replaced or retired, and *inactive for 14 days — possibly replaced* when it has not been seen for that long.
- **Archives kept by ShopForge** — each closed day, month and year of the register and its archive, as on This register.
- **Rename** — its label, up to 60 characters.

Verify all registers, at the top of the view, checks the registers one after the other, with **Verifying 2 of 4…** and a **Cancel**. A chain that fails is shown and the run goes on. A register the run could not check — it was cut, the connection dropped or a request failed — reads **Not verified**, never *OK*, until a later run checks all its chains. Each register and chain checked is written in the journal.

Periods

The consolidated reports, one row per period. Pick **Daily**, **Monthly** or **Annual** (the arrow keys move between them). By default the list shows the periods that **need you**; **All periods** shows every period of the window, and **Load older** goes further back. A period still owed that is older than the window is listed too.

- A row says what the period is: *produced* (with its version, and *replacing* the previous one), *waiting for registers*, *can be produced now*, or *period still open*. For a period that has ended it adds up the registers like a cause on the Overview does (**27 closed · 2 missing: Counter 3, Counter 7 / 29**). A period waiting is waiting for a closure a register still owes — usually it has simply not closed that period yet.
- A produced report carries **Computed report — sealed by the server** on its row. The server computes it from the signed closures it lists and seals it by a signed event of its journal. The seal shows the server produced this content at that point, not that it is true. To check one, add those closures up and recompute the hash.
- **Produce** is on the row of a period that is ready (or whose report has gone out of date); **Produce the {count} ready reports (days, months, years)** is at the top when more than one period is ready. It asks first: "Produce these Global Z reports?", with the periods listed by level (**Daily**, **Monthly**, **Annual**) and "Producing a Global Z report closes nothing: it sums the registers' signed closures, and the server seals it by a signed event of its journal."; **Produce {count}** confirms and **Cancel** goes back. Producing a report that has not changed writes nothing; if a closure has arrived since and changes the figures, a new version is written that replaces the previous one (kept): the new version is the one to file.

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Click a row to open the period. The panel has, for every register, its state — *missing* and *pending* (naming who may close on its behalf) first, then *closed* and *no activity*; in a period that has not ended it reads *not closed yet*, because nothing is due before the period is over. For a missing register that is active, **Lost register?** leads to its retirement. Then: what to do for each register the period waits for — close it on that register's **End of day** tab; for a replaced or retired register, close it on its behalf from a register that may close for it; or, when no register can close for it any more, that nobody can. **Where the register's month or year was closed without that period, the period can never be closed and the panel says so: that closure will never exist, and it must be raised with whoever handles the shop's fiscal obligations.** Nothing in it should be read as the report being sound. For a produced period, the panel shows each register's signed closure (one that was accepted with an anomaly comes first), the totals, the perpetual total of the shop (a replaced register's frozen total counts once, and revenue it never synced is on its own line), the content hash and every version — if a late closure arrives, a new version replaces the old one, which is kept. Under the registers' closures, a line names any register the report leaves out because none of its records for the period has reached the server and it has not been in contact since the period ended: "Not included: T2 (Front till). None of its records for this period has reached the server, and it has not been in contact since the period ended. If they arrive, this report is produced again." It does not say that register sold nothing. The PDF prints the same line, in French. **Every one of these reports says "Computed report — sealed by the server".** You can download the JSON, and the four actions below.

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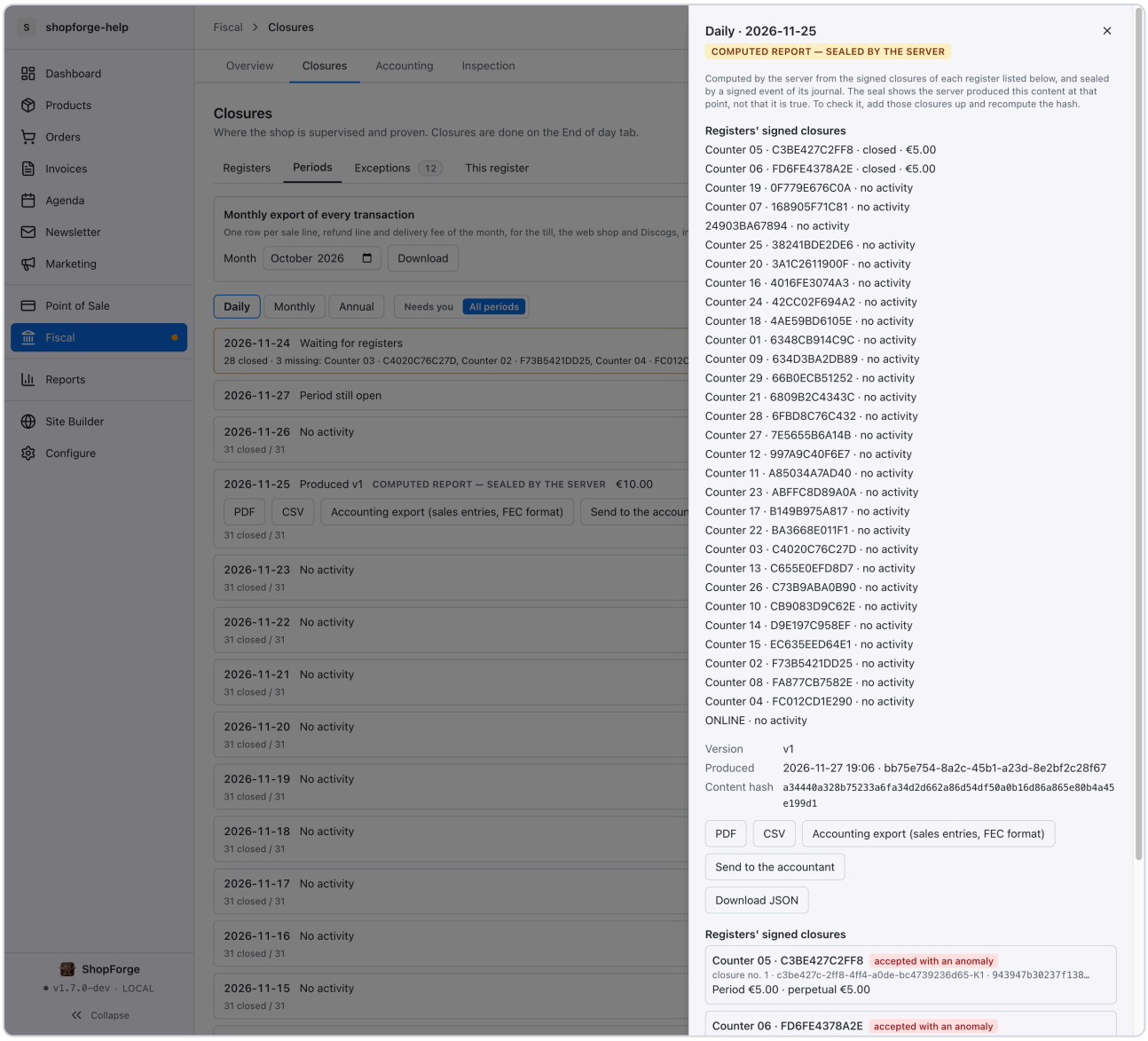

The Global Z report. Once a period's report is produced, its row and its panel (headed **Global Z report**) offer four actions: **PDF**, **CSV**, **Accounting export (sales entries, FEC format)** and **Send to the accountant**. The PDF is the report to read; the **CSV** is a zip of tables for a spreadsheet, whose VAT table has a `category` column and, for the donations and the gift cards sold, a row `outside_scope` per category (`loyalty.donation`, `loyalty.giftcards`) with no rate and no amount without VAT; the **Accounting export (sales entries, FEC format)** is one file in the shape accountants import (FEC-shaped), with the sales per VAT rate, the donations and the gift cards sold each on a line of their own (the donations credited to **Donations received**, the gift cards to the gift-card liability account: both are outside the VAT rows), and the payments per method, from the accounts you set in **Configure → Fiscal → Accounting**. The web journal books the online payments, Discogs ones included, once, on the day of the payment: a Discogs payment is debited to the Discogs receivable account of the Discogs report settings. A month or a year is exported day by day: if its daily reports do not add up to the period's own report, the export says so and nothing is made, so produce the missing daily reports first. A period that is not complete has none of the four actions: its panel names the register it waits for. A produced report that could not include a register names it under the registers' rows: "Not included: *register*. None of

its records for this period has reached the server, and it has not been in contact since the period ended. If they arrive, this report is produced again." The Global Z report's PDF carries the same line, in French. **Send to the accountant** emails the PDF and the accounting export to the accountant's address, through your shop's email settings, and says whether it went out; each attempt is written in the journal. The button is off, with a hint, until an admin sets the address in **Configure → Fiscal → Accounting**.

The monthly export of every transaction. Apart from any period row, the top of the Periods view has a box, **Monthly export of every transaction**, for an admin online: a month picker and a zip download with one row per sale line, refund line and delivery fee of the till, the web shop and Discogs, for the accountant. See Monthly export for the accountant.

The online register and the web information. The online shop and Discogs sales are a row of the report, **ONLINE**, next to the registers, taken from its signed closure. The PDF prints its two channels apart, « dont site » and « dont Discogs » (*of which the shop's site*, *of which Discogs*), with the amounts including and excluding VAT, and the row has no staff line. The registers' totals, ONLINE among them, are the shop's totals: there is no separate shop total. A day that only the online shop sold has ONLINE's closure, and reads like any other day.

What the report still computes for the web is the **delivery fees** and the **outside-the-scope-of-VAT** breakdown (the donations and the gift cards sold), in a block headed « Informations web (dérivées, hors empreinte) : frais de livraison et hors champ ». It now counts the Discogs orders too, on the day they were paid. The orders, refunds, VAT and payments of the web are in ONLINE's signed row, not in this block. In the CSV, the derived web VAT, payment and category rows are gone for that reason; the delivery fee row stays, marked `derived`. In the accounting export, the `till` journal holds the registers and the `web` journal holds ONLINE's row, with no cash-difference line: the block books nothing, so no sale is booked twice.

The VAT rows of the panel are one per rate and scheme for French VAT, as "VAT 20 %" or "Margin-scheme VAT 5.5 %", and one per treatment and destination country for an online sale: "VAT 19 % OSS DE", "Intra-community supply, exempt, DE", "Export, exempt, US" ("Export, exempt, margin, US" for a second-hand item). The PDF prints the same rows in French, whatever the interface language (« TVA 19 % OSS DE », « Livraison intracommunautaire exonérée DE », « Exportation exonérée US »). Which accounts they are booked on is in VAT on distance sales.

The donations and the gift cards sold are outside the VAT rows, and are shown apart from them: the panel shows them once, on the totals of all the registers (ONLINE's row among them), on a row **Donations, outside the scope of VAT** and a row **Gift cards, VAT due when used** (their number and amount, net of refunds). The PDF prints them on the totals' VAT lines (« Dons, hors champ de la TVA » and « Cartes cadeaux, TVA due à leur utilisation ») and again in the web information block. The CSV has a row `outside_scope` per category for them, with no rate and no amount without VAT.

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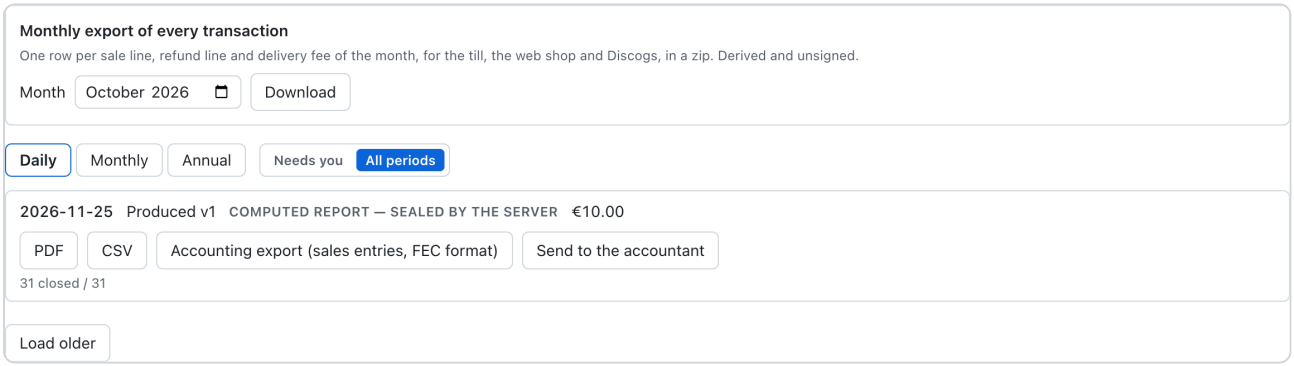
The web information block is not stored with the report: it is computed each time the report is opened, downloaded or sent, and each document says when (« Informations web calculées le … », meaning *web information computed on …*, in the shop's time zone). It is marked « Dérivé, hors empreinte » (*derived, outside the hash*): the report's hash and version cover the registers' signed closures only, so a web figure recorded late for a day already reported never changes the hash or writes a new version; it simply appears in the next document you open or download for that day. A refund counts on the day it is recorded. The CSV and the accounting export of one download are computed together, at the same moment, so they agree.

The month's report also lists, under « OPÉRATIONS EN LIGNE À CONFIRMER » (*online operations to confirm*), the refunds made outside ShopForge that were reported up to the end of the month and are still to confirm, one line each: « Commande {number} : {source}, le {date} ». The source reads « remboursement PayPal », « remboursement Discogs », « annulation Discogs d'une commande payée », « statut Discogs sur une commande annulée » or « litige clos, restitution des fonds à confirmer », and « — litige en cours » follows while the order's dispute is open. When there are none, it reads « Aucune. ». This block is outside the report's hash and every total: nothing in it is counted until the refund is confirmed on its order.



Monthly email. Once that address is set, the previous month's report is also emailed by itself, once a month, after the month is produced; if the email cannot be sent it is tried again the next day, and you can always send it yourself. With no address, nothing is ever sent. These reports are still **computed and sealed by the server**; each register's own closure stays the signed record.

The online register

Sales on the web shop and on Discogs are signed in one register of their own, **ONLINE**, and it appears next to the tills in the Periods view. It has no till and no cash drawer, so nobody makes its closures: the server closes **each day, each month and each fiscal year by itself**. It looks every 10 minutes. A day is closed once it has ended by the shop's business day (the same day as the tills'), and the month and the year once they have ended too. Its daily closure has no cash count and no session. A day without any online sale gets no closure. In the Global Z report's PDF its row shows the two channels apart, the shop's site and Discogs, and its totals add to the shop's like a till's.

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Nobody closes ONLINE by hand: where a period's panel tells you to close a register on its **End of day** tab, that does not apply to ONLINE. What you may see in a period:

- **While the day runs, or in the minutes after it ends**, the day with online sales is not closed yet. A day that has ended is closed within a quarter of an hour, at the next run; until then it waits, and it closes on its own.
- **A day that stays open** past the reminder (more than 1 day for a daily closure, 5 days for a monthly one, 30 days for an annual one, the reminders of Registers) means the automatic closure has stopped. This is the alarm, not a figure to wait out: tell whoever supports the shop. The online sales stay recorded and signed in the meantime, and the closure is made, in order, when the server runs again.
- A sale recorded after its day was closed is not lost: it is counted in the next closure, and in the perpetual total, which is never restated.

The reports of the Periods view wait for **ONLINE** like they wait for a till: a period with a day still not closed on ONLINE is **Waiting for registers**.

Exceptions

What needs a person. There are three kinds:

- **Needing acknowledgement**: events the server recorded — a terminal identity conflict, a record dated in an already closed period, a chain break, a terminal restored to an earlier state, a PayPal payment taken with no sale (**PayPal capture anomaly**), an online refund that could not be completed after repeated attempts (**Online refund not completed**), a till sale of an order that was already paid (refund the sale), a till sale of an order the server does not hold (check the sale; the exception names the order). They are grouped by event, with the registers named inside, and each group is folded: click it to see its exceptions, and **View in the journal** shows the event. A chain break, a restore or an identity conflict is one group **per register**, so one note can never stand for several registers. Each exception stays open until you **acknowledge** it with a **note**. **Acknowledge…** on a group (a late sync can open a hundred) opens it and lists **every** exception it will acknowledge; so does **Acknowledge the selection** for the ones you ticked. Then you write the note and confirm. The note is required, is free text, is recorded in the journal exactly as written and can never be erased: do not enter personal data. One note covers the list, but each exception is recorded separately. If more exceptions match than you were shown, nothing is acknowledged and you are asked to review the list first. Acknowledging does not erase an exception — it moves to the history and says only that a person examined it. One type of exception closes by itself: a session close whose figures did not agree with the server's is closed by the system when a record that arrived late makes them agree again. It moves to the history marked as closed by the system, with no note, and the journal keeps both readings. An **Online refund to confirm** (a refund made in PayPal or by Discogs, outside ShopForge) is listed too, but it is not acknowledged here: where the button would be, the row says *Confirm this refund on its order.* It leaves the list when the refund is confirmed or closed on its order (see A refund made outside ShopForge). A dispute an administrator closes by hand is journalled as **Dispute closed by hand**.

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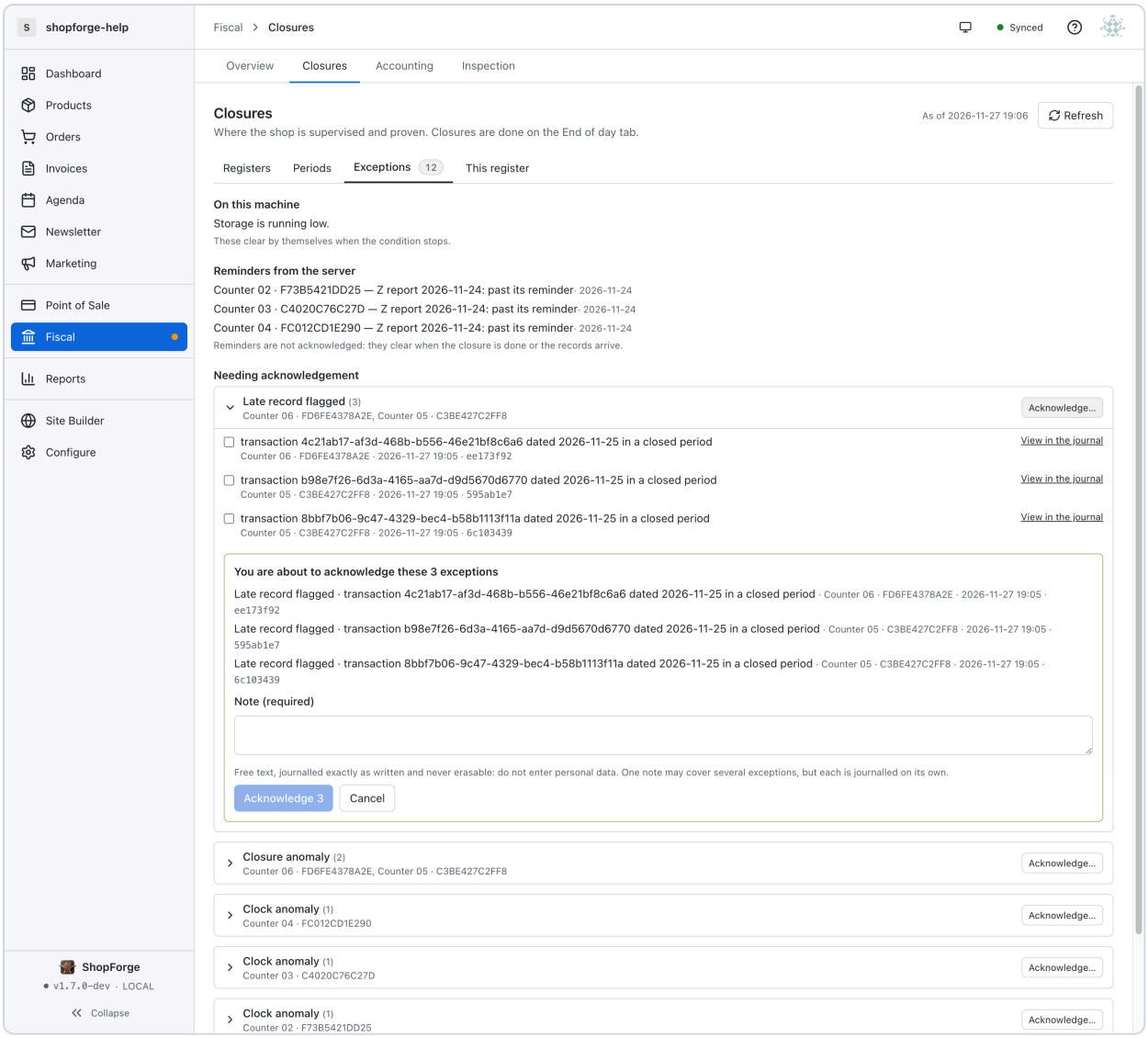

- **Reminders from the server** — a closure past its reminder, a register whose last check found records missing. They clear by themselves when the closure is done or the records arrive, and are not acknowledged.
- **On this machine** — the offline limit exceeded, records waiting over 24 hours to reach the server, low storage, a failed software self-check. They clear when the condition stops.

This register

One page about the computer you are on, with four sections:

- **Closures of this register** — what this register still owes, from its own ledger (this works offline): the five oldest, then *and 3 others*. The same reminder rules as above apply. To close, go to the **End of day** tab.
- **Integrity of this register** — **Verify now** checks this register's chains here (offline too). The same check is also in **Registers** and, for every employee, in End of day (see Verify this register).

- **Retention and storage** — the size of this computer's ledger, the free disk space and how many months that lasts at the current growth. It warns when less than 10 % of the disk is free or less than 6 months are left; the warning also shows on the Overview, under **Archives and storage**. It also shows the oldest record the server has **received**, which trails a record's own date for a register that synced late.
- **Archives kept by ShopForge** — this register's closed periods and their archives (below).

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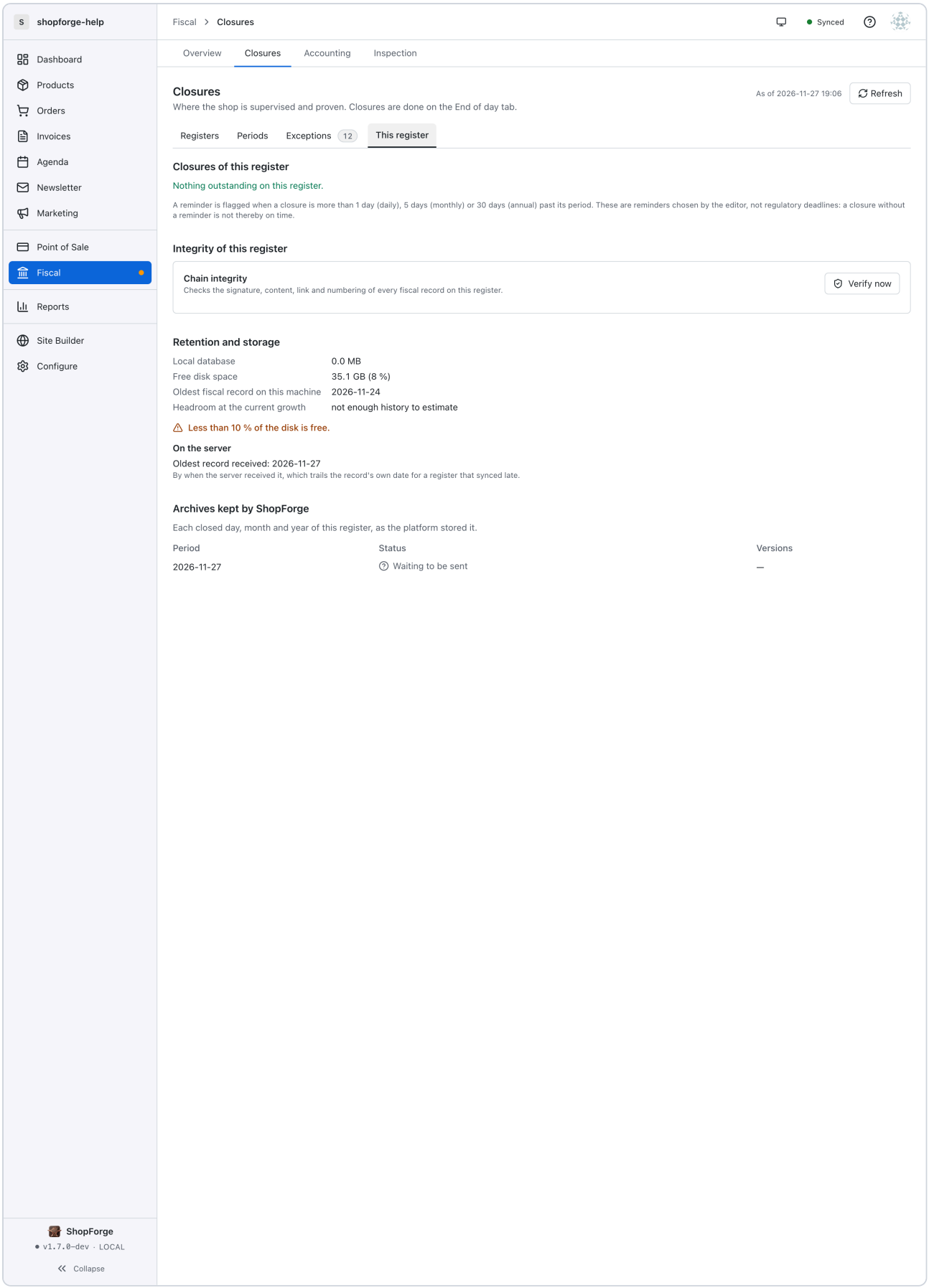

Archives kept by ShopForge

After each closure, the register builds the archive of that day, month or year by itself and sends it to ShopForge: nobody has to ask for it. A copy waits beside the app's data folder until it is sent, so a reinstall doesn't lose it; any staff member's session sends it at the next sync, and offline it waits. ShopForge checks each archive as the standalone verifier does. It keeps a stored archive for at least 10 years, counted from the day it was stored. The register keeps its own copy too, the file it built, in the `archives` folder of the app's data: an erase or a reinstall removes that folder, and ShopForge's copy stays.

The list shows each day, month and year closed since the fiscal year began (the yearly closure of the year just ended included), newest first, with a status:

- **Stored** — ShopForge checked it and keeps it.
- **Waiting to be sent** — the file is still on this register, or ShopForge hasn't received it yet, within 48 hours of the closure.
- **Being checked** — received and not checked yet.
- **Rejected** — every copy sent failed the check; the reasons are listed under its versions. The register builds and sends the period once more by itself, at its next pass; the new copy is listed as a further version. If that copy is rejected too, the register doesn't send it again: contact support.
- **Missing** — nothing is stored 48 hours after the closure.
- **Two different archives** — two copies of the same period both passed the check with different records. Both are kept: tell support.

{n} versions opens one line per copy ShopForge received: "Received {date} · SHA-256 {first 12 characters} · {status}", with the reasons under a rejected one. "No closed period this fiscal year." means nothing is closed yet; "Needs a connection to the server." means the list can't be read offline.

A staff member sees the list of the register they are on, one register at a time; an administrator also sees each register's in **Registers**. On the Overview, a missing or doubled archive is a row under **Archives and storage** ("Missing archive: {period}", "Two different archives: {period}").

Accounting

Fiscal → Accounting is where you prepare a month for your accountant. ShopForge files nothing: it prepares the figures, and you or your accountant declare them. The page says so, and it never says that a return was filed, or that none is due.

Pick the **Month** (it offers the last ended month, and only an administrator who is online sees the page: offline it reads "Needs a connection: this part is derived by the server."). A month that is still running reads "November 2026 is not over yet." and has no pack.

The month's state is the one of its Global Z report:

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- "Global Z report v2, produced 1 November 2026." The report is made. If a later closure produced a new version after you sent the pack, the page adds "A new version replaces the one sent on ...".
- "Every register has closed October 2026. The Global Z report can be produced now." Click **Produce the Global Z report**.
- The Global Z report of the month waits for registers: the page names them. Close the month on the register named (see Periods); the page has no pack until then.
- A month with no till sale: "No till sales in October 2026, so there is no Global Z report. The online and Discogs reports are in the pack."
- A month with no sale on any channel: "ShopForge recorded no sales in October 2026. A return may still be due: ask your accountant."

Declarations. The table says which return each figure of the pack feeds, so a figure is neither declared twice nor forgotten. The first row is your own return, taken from the VAT regime of Legal identity: the CA3 monthly or quarterly, or the CA12. The other rows are the OSS return, the CA3's operations without French VAT, the VAT summary statement, the EMEBI, the margin scheme, gift cards sold, donations and Discogs sales. For each row the page gives what is declared, the month's figure, the pack figure that feeds it, and the return and its deadline.

- The till and online sales are on separate lines, **one line per rate** (the OSS per country and rate): the rates are never merged, because a CA3 is filed per rate.
- A monthly figure is the month's share of a quarterly or yearly return. It is never the return itself.
- The online lines come from the distance-sale VAT report only, which holds the web shop and Discogs sales; the Global Z report's web band is not added to it. The margin scheme comes from the monthly export of every transaction: a refund's margin base is worked out from its VAT, so a refund can leave a few cents of base. A second-hand item shipped outside the EU counts in the operations without French VAT, at its sale price, not in the margin scheme.

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- **The CA3 lines** are named in the table:
  - **A1** holds the total base of your French sales; **08** (20 %) and **09** (5.5 %) each hold that rate's base and its VAT. EU consumer sales under the €10,000 threshold, taxed in France, go there too.
  - **E1**: exports, and sales shipped to an overseas department or collectivity. **F2**: intra-EU supplies to a VAT-registered buyer. **E3**: distance sales taxed in another member state through the OSS.
  - **Margin scheme:** the margin without its VAT goes on A1 and in the base of 08 or 09, with its VAT beside it. The rest of the price, the purchase cost, goes on **E2**, shown as "E2 {amount}" under the margin's lines. A copy bought 10.00 and sold 30.00 gives 16.67 of base, 3.33 of VAT and 10.00 on E2. A copy sold with no margin puts its whole price on E2.
  - **Gift cards sold and donations** are not declared on the CA3. A gift card's VAT is declared with the goods it pays for, when it is used.
- A row no figure of the pack feeds says "No figure in the pack for this line".
- **What the pack cannot give:** the deductible VAT (purchases, Discogs fees), so no CA3 is complete from the pack alone; the CA12 instalments; the data of the EMEBI.

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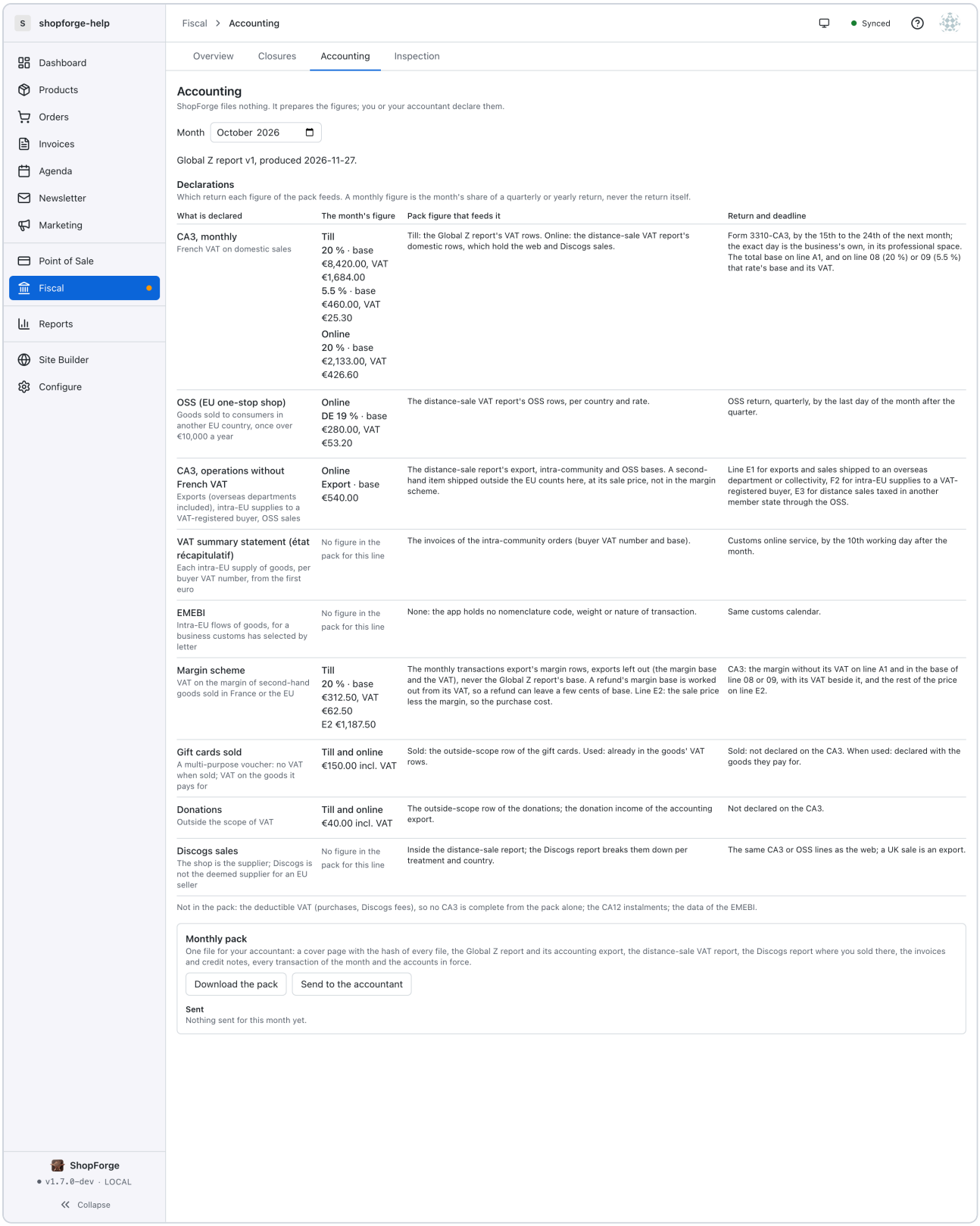


The monthly pack is one zip for your accountant, made when you ask for it. It holds:

- `cover.pdf` : the shop, the month, the state and the table's figures, then the name, size and SHA-256 of every other file, and the note that ShopForge files nothing;
- `contents.json` : the same list, read by the verification page, which checks that every file is there and matches;

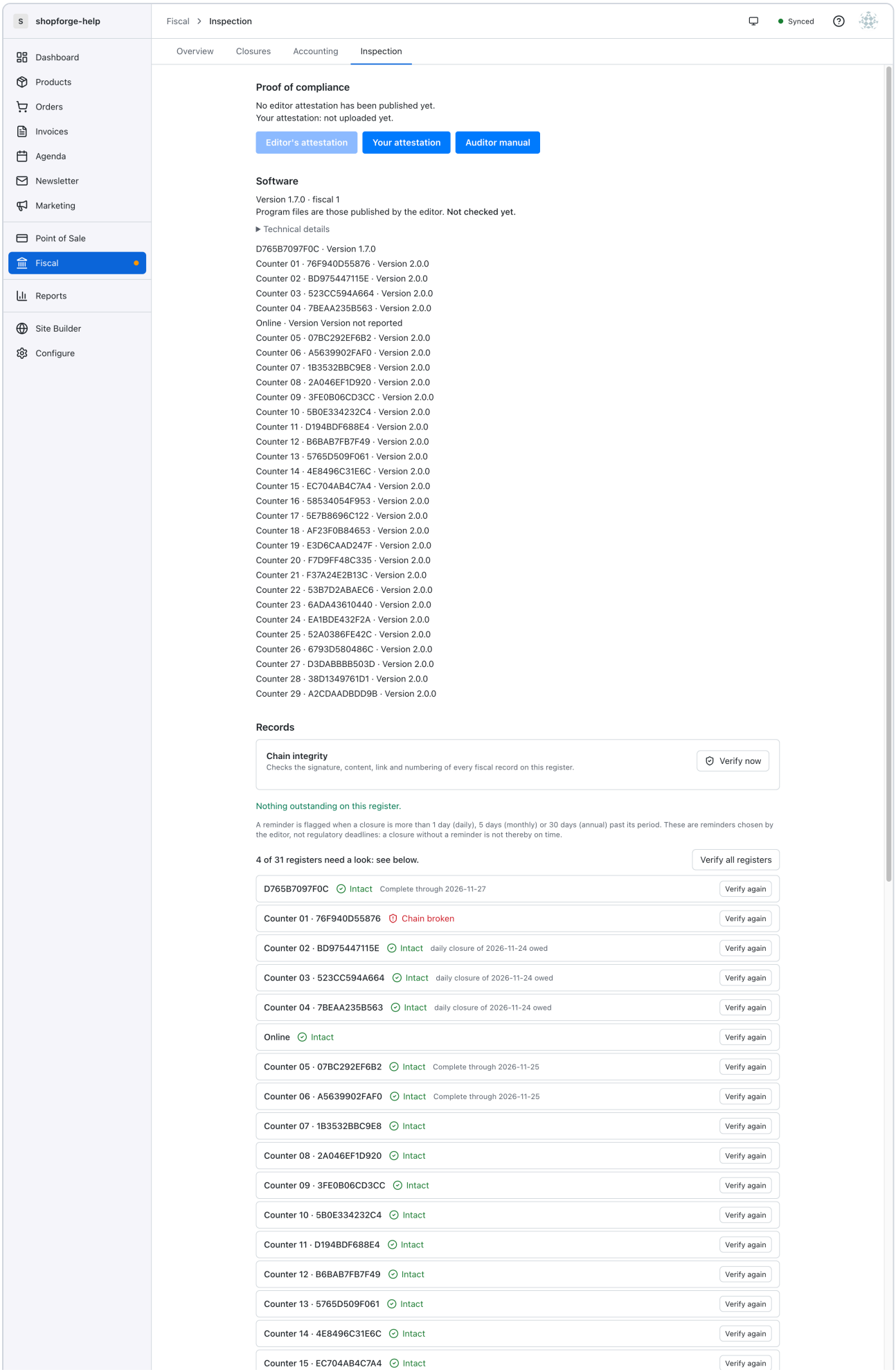
- `global-z/` : the Global Z report (PDF), its CSV tables and its accounting export (FEC format), when the month has a report;
- `distance-sale-vat.csv` : the distance-sale VAT report;
- `discogs/` : the Discogs report and its export, only when you sold on Discogs that month;
- `invoices/` : the PDF of every invoice and credit note of the month, and `invoices.csv` , the list; an invoice whose PDF is not stored yet is in the list and counted on the cover;
- `transactions/` : the monthly export of every transaction (see Monthly export for the accountant), the whole month in one file;
- `accounts.csv` : the accounting accounts in force.

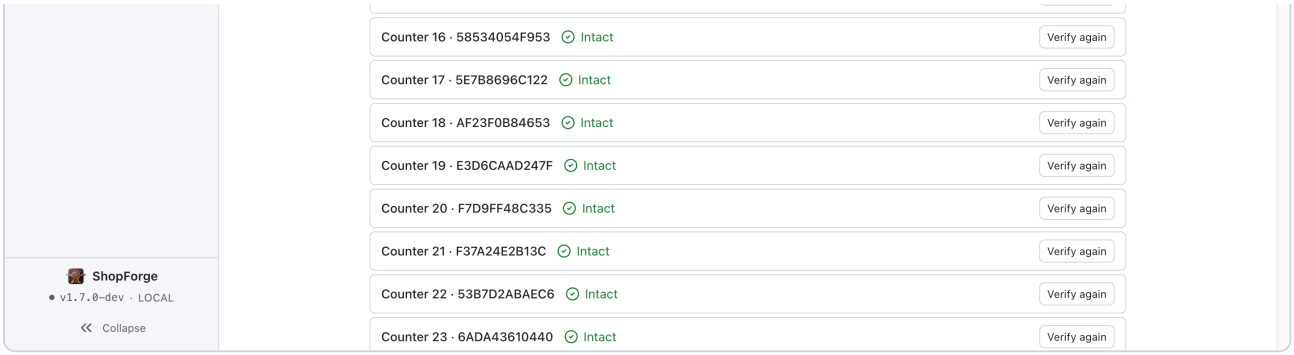
The pack is derived and signs nothing.

- **Download the pack** builds it and downloads it. The link lasts an hour. A pack is for one version of the Global Z report: downloading again replaces the previous pack of that version.
- **Send to the accountant** emails the pack as an attachment to the address set in **Configure → Fiscal → Accounting**, through your shop's email settings: the pack last downloaded for the month's Global Z report, or a new one if none was. Without an address the button is off and the page says where to set it. Above 10 MB the pack is not emailed: "This pack is too large to send by email (12.4 MB). Download it and send it yourself." The link itself is never emailed.
- Under the buttons, **Sent** lists each send: the date, the domain of the address, the result and the version of the Global Z report it carried. A failed attempt says the email could not be sent and is recorded in the JET journal.
- The month-end email of the Global Z report still carries only the PDF and the accounting export; the pack is sent by hand from this page.

Inspection

Fiscal → Inspection is the screen to open when a tax inspector arrives. Its four sections follow the order an inspection asks, each in plain words; the technical values are folded under **Technical details**.


shopforge-help
Dashboard
Products
Orders
Invoices
Agenda
Newsletter
Marketing
Point of Sale
Fiscal
Reports
Site Builder
Configure
Fiscal > Inspection
Synced
Overview
Closures
Accounting
Inspection
Proof of compliance
No editor attestation has been published yet.
Your attestation: not uploaded yet.
Editor's attestation
Your attestation
Auditor manual
Software
Version 1.7.0 · fiscal 1
Program files are those published by the editor. Not checked yet.
Technical details
D765B7097F0C · Version 1.7.0
Counter 01 · 76F940D55876 · Version 2.0.0
Counter 02 · BD975447115E · Version 2.0.0
Counter 03 · 523CC594A664 · Version 2.0.0
Counter 04 · 7BEAA235B563 · Version 2.0.0
Online · Version Version not reported
Counter 05 · 07BC292EF6B2 · Version 2.0.0
Counter 06 · A5639902FAF0 · Version 2.0.0
Counter 07 · 1B3532BBC9E8 · Version 2.0.0
Counter 08 · 2A046EF1D920 · Version 2.0.0
Counter 09 · 3FE0B06CD3CC · Version 2.0.0
Counter 10 · 5B0E334232C4 · Version 2.0.0
Counter 11 · D194BDF688E4 · Version 2.0.0
Counter 12 · B6BAB7FB7F49 · Version 2.0.0
Counter 13 · 5765D509F061 · Version 2.0.0
Counter 14 · 4E8496C31E6C · Version 2.0.0
Counter 15 · EC704AB4C7A4 · Version 2.0.0
Counter 16 · 58534054F953 · Version 2.0.0
Counter 17 · 5E7B8696C122 · Version 2.0.0
Counter 18 · AF23F0B84653 · Version 2.0.0
Counter 19 · E3D6CAAD247F · Version 2.0.0
Counter 20 · F7D9FF48C335 · Version 2.0.0
Counter 21 · F37A24E2B13C · Version 2.0.0
Counter 22 · 53B7D2ABAEC6 · Version 2.0.0
Counter 23 · 6ADA43610440 · Version 2.0.0
Counter 24 · EA1BDE432F2A · Version 2.0.0
Counter 25 · 52A0386FE42C · Version 2.0.0
Counter 26 · 6793D580486C · Version 2.0.0
Counter 27 · D3DABBBB503D · Version 2.0.0
Counter 28 · 38D1349761D1 · Version 2.0.0
Counter 29 · A2CDAADBDD9B · Version 2.0.0
Records
Chain integrity
Checks the signature, content, link and numbering of every fiscal record on this register.
Verify now
Nothing outstanding on this register.
A reminder is flagged when a closure is more than 1 day (daily), 5 days (monthly) or 30 days (annual) past its period. These are reminders chosen by the editor, not regulatory deadlines: a closure without a reminder is not thereby on time.
4 of 31 registers need a look: see below.
Verify all registers
D765B7097F0C Intact Complete through 2026-11-27 Verify again
Counter 01 · 76F940D55876 Chain broken Verify again
Counter 02 · BD975447115E Intact daily closure of 2026-11-24 owed Verify again
Counter 03 · 523CC594A664 Intact daily closure of 2026-11-24 owed Verify again
Counter 04 · 7BEAA235B563 Intact daily closure of 2026-11-24 owed Verify again
Online Intact Verify again
Counter 05 · 07BC292EF6B2 Intact Complete through 2026-11-25 Verify again
Counter 06 · A5639902FAF0 Intact Complete through 2026-11-25 Verify again
Counter 07 · 1B3532BBC9E8 Intact Verify again
Counter 08 · 2A046EF1D920 Intact Verify again
Counter 09 · 3FE0B06CD3CC Intact Verify again
Counter 10 · 5B0E334232C4 Intact Verify again
Counter 11 · D194BDF688E4 Intact Verify again
Counter 12 · B6BAB7FB7F49 Intact Verify again
Counter 13 · 5765D509F061 Intact Verify again
Counter 14 · 4E8496C31E6C Intact Verify again
Counter 15 · EC704AB4C7A4 Intact Verify again



- **Proof of compliance** — one sentence for each attestation. The editor's reads "Editor's attestation: covers this version, signed on …", "Editor's attestation: doesn't cover this version (signed on …)" or "No editor attestation has been published yet."; yours reads "Your attestation: signed, uploaded on …", "Your attestation: not uploaded yet." or "Your attestation: can't tell, needs a connection.". The buttons open the editor's attestation, your attestation and the auditor manual, each in a folder on this computer. Opening the editor's attestation is recorded in the JET journal. A register that has not been online since your attestation was uploaded doesn't have it yet: open Configure → Fiscal while online to fetch it.
- **Software** — this register's line, "Version {version} · fiscal {n}", and "Program files are those published by the editor." followed by **Verified**, "They don't match the published files." or "Not checked yet.". **Verified** means two checks passed: the program files on this computer match the build manifest, and that manifest matches the entry ShopForge published for this version. **Technical details** shows the software versions (the application version, the fiscal major version, the fiscal fingerprint and the editor's attestation that covers them), the build manifest and the published anchor. If either check fails, selling is blocked and the register asks an administrator to reinstall the application — the fiscal records are kept, and neither "Re-sync from server" nor "Replace this register" applies. The published-anchor check runs again after a restart, at the next synchronization. Below it, the **version of every register**, this register first: "{register} · Version {version}", or "Version not reported" for a register that has not reported one. It comes from the server, so offline the screen says "The other registers need a connection." and this register's own lines keep working.

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D765B7097F0C · Version 1.7.0
Counter 01 · 76F940D55876 · Version 2.0.0
Counter 02 · BD975447115E · Version 2.0.0
Counter 03 · 523CC594A664 · Version 2.0.0
Counter 04 · 7BEAA235B563 · Version 2.0.0
Online · Version Version not reported
Counter 05 · 07BC292EF6B2 · Version 2.0.0
Counter 06 · A5639902FAF0 · Version 2.0.0
Counter 07 · 1B3532BBC9E8 · Version 2.0.0
Counter 08 · 2A046EF1D920 · Version 2.0.0
Counter 09 · 3FE0B06CD3CC · Version 2.0.0
Counter 10 · 5B0E334232C4 · Version 2.0.0
Counter 11 · D194BDF688E4 · Version 2.0.0
Counter 12 · B6BAB7FB7F49 · Version 2.0.0
Counter 13 · 5765D509F061 · Version 2.0.0
Counter 14 · 4E8496C31E6C · Version 2.0.0
Counter 15 · EC704AB4C7A4 · Version 2.0.0
Counter 16 · 58534054F953 · Version 2.0.0
Counter 17 · 5E7B8696C122 · Version 2.0.0
Counter 18 · AF23F0B84653 · Version 2.0.0
Counter 19 · E3D6CAAD247F · Version 2.0.0
Counter 20 · F7D9FF48C335 · Version 2.0.0
Counter 21 · F37A24E2B13C · Version 2.0.0
Counter 22 · 53B7D2ABAEC6 · Version 2.0.0
Counter 23 · 6ADA43610440 · Version 2.0.0
Counter 24 · EA1BDE432F2A · Version 2.0.0
Counter 25 · 52A0386FE42C · Version 2.0.0
Counter 26 · 6793D580486C · Version 2.0.0
Counter 27 · D3DABBBB503D · Version 2.0.0
Counter 28 · 38D1349761D1 · Version 2.0.0
Counter 29 · A2CDAADBDD9B · Version 2.0.0

- **Records** — this register's integrity check (**Verify now**, offline too) and the closures it still owes. Below, the whole shop first, in one line: "All {n} registers are intact." or "{n} of {total} registers need a look: see below.", then each register: its integrity ("Intact", "Chain broken" and, once it has been verified again, where it breaks, or "Not checked yet") and its closures ("Complete through {date}", the date of its last daily closure, or the oldest closure it still owes). **Verify again** on a register checks it now, and **Verify all registers** checks them one after the other. This needs a connection; Registers shows the same data in more detail.

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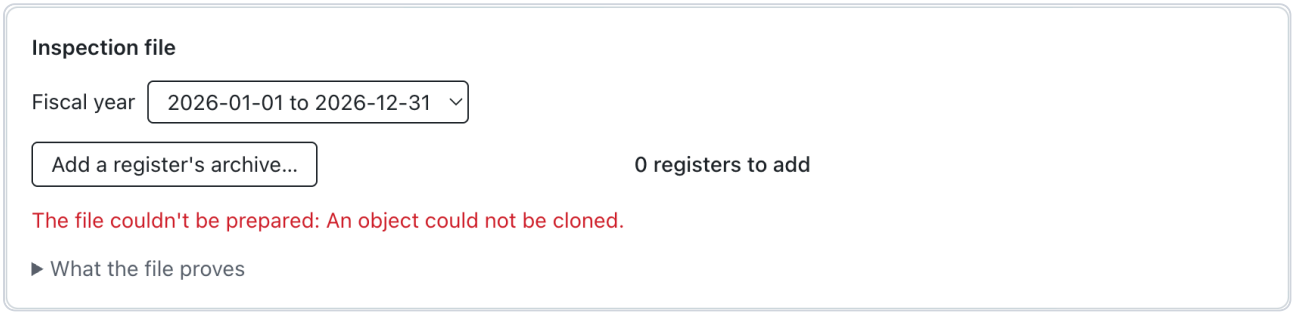
- **Hand over** — the inspection file, then the evidence dossier for every register, this register's archive and its own evidence dossier:
  - **Evidence dossier for every register** — prepared by ShopForge's servers from the data of every register of the shop, so it needs a connection. Click **Request dossier**, wait for it to be ready, then **Download and show in folder**. The file is kept only if it matches the one recorded in the journal.
  - **Archives** and **this register's evidence dossier** work offline (see Generate an archive).
  - **The archive period.** Choose the first and the last day: both are included. The line under the dates shows the exact bounds, for example "From 1 September 2026, 00:00 (included) to 2 October 2026, 00:00 (excluded) (Europe/Paris time): every record of 1 September through 1 October." The same line appears in the archive list, in a finished archive's summary and in the archive's own verification text.



The inspection file

The **inspection file** is the default way to hand over a fiscal year's records. It isn't the only one: the inspector may still ask for an archive, a filtered export, or look at the app itself. It is one ZIP that gathers existing archives without changing any:

- the server's archives for the year, covering the whole shop, as the server stored them: the yearly archive when the year is closed, otherwise the monthly archives so far and the days no monthly archive covers, each with its manifest, none rebuilt. They aren't signed: each record in them carries its own signature;
- the server's **extracts**, built when you prepare the file from the records the server holds as they are: one for the current period (from the last archive the server stored up to now), and one for each closed period the server hasn't stored an archive for yet. Each is sealed by a signed record of the server naming who asked and, for each register, its last record received;
- the signed archive of this register, and of any register whose archive you added; for another register, the archives it signed and ShopForge stored after each of its closures, when it has one for every closed period;
- the shop's evidence dossier (`docs/dossier-preuves-boutique.pdf` , see **Evidence dossier for every register** above);
- the auditor manual and your attestations, each when it is available;
- the verification page (`verification/fiscal-verify.html`), in the version its archives name;

- an index, `dossier.json`, listing every register with its state and every file with its SHA-256.

Choose the **Fiscal year** (this one or the one before). The list then shows every register:

- **In the file** — its archive for the year has been added.
- **To add** — this register only: click **Save this register's archive for the fiscal year {year}**. A register this register replaced appears as "{register} (replaced by this register)", with its own button, **Save the archive of {register} for the fiscal year {year}**, when this computer holds its ledger, meaning it signed it itself: the records every register keeps a copy of don't count. Click it (an administrator is needed): this register checks the old register's records without changing them, signs the archive with its own key, and the line reads **In the file**. A register replaced on another computer, or whose records this computer only received from the server, stays covered by the server's archive, and its line names the register that replaced it.
- "{register}: covered by the server." — every other active register. You don't need its computer: the server's archives and extracts carry its records as it sent them. After **Prepare the inspection file**, the line says how far the extract goes for it: "{register}: covered by the server through {date and time}.", the last record the server received from it, or "{register}: covered by the server, which hasn't received anything from it yet." What it recorded and didn't send isn't in the file, and stays on that register. You can still save an archive on that register and add it here (**Add a register's archive…**): it covers everything it holds, unsent records included.
- A line with only a sentence means the register is covered by the server's archive, and the sentence says why: "{register} (retired) can no longer build its archive. Its records are in the server's archive.", the same with "(replaced by {register})", "This register isn't in the list of registers. …", or "{register}'s archive fails verification: its records are in the server's archive." when the archive offered for it was refused.

The list comes from the server. Offline, it shows this register only and says "The other registers need a connection.", and **Prepare the inspection file** is off, since it needs the server.

Adding an archive checks it as the standalone verifier does: an archive of a register of the file, for this fiscal year, signed with that register's key (or the key of the register that replaced it), every file matching its manifest, the chains intact, and the keys the shop's. A file that fails says why and isn't added:

- "This file isn't a readable archive." or "This file isn't a register's archive."
- "This archive belongs to a register that isn't in this file."
- "This archive is {register}'s for the fiscal year 1 January 2025 to 31 December 2025, not for the fiscal year 1 January 2026 to 31 December 2026."
- "This archive rests on a key this register doesn't know yet: let it sync, then try again."

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- An archive that fails verification:
  - "This archive's signature isn't valid: it isn't added."
  - "This archive is signed by a register that didn't replace {register}: it isn't added."
  - "This archive rests on a revoked key without saying so: it isn't added."
  - "This archive's content doesn't match its manifest: it isn't added."
  - "This archive fails the standalone verifier's check: it isn't added."

  Unless a good archive of that register is already in the file, the register is then covered by the server's archive, and its line says so; the file's index records the refusal.

Adding a second accepted archive for the same register replaces the first; a refused one never replaces an archive already in the file.

The file is **Ready to hand over** when no register is left to add; otherwise the screen says how many are left ("2 registers to add"). **Prepare the inspection file** downloads the archives the server stored, asks the server for its extracts and waits for them (up to ten minutes), downloads the stored archives of the other registers (each checked as an added archive is), and requests the shop's evidence dossier ("Preparing... Downloading the archives the server stored."), checks again each archive added, writes the file, records it in this register's JET journal, and shows it in its folder. The screen then gives the file's full path, "File prepared: /.../inspection/dossier-controle-....zip", with **Show in folder** to open its folder again. A closed period the server hasn't stored an archive for yet is in an extract; only one that no extract holds (when the extract couldn't be built) is named under it ("Server archive not stored yet for: .... The file lists them as missing.") and listed in the index as missing. If the server can't build an extract in time, the file is still written, with the archives it stored and no extract: the other registers then read **To add**, and the screen says "The server couldn't build the extract of the current period: try again." If an archive or the evidence dossier fails, isn't ready in time or doesn't match, nothing is written and the screen says "The file couldn't be prepared: ...". The file's index also lists every archive ShopForge stored for the fiscal year (each with its key, its SHA-256 and its status, a doubled period marked), and the file carries a register's yearly archive when this computer still holds the copy ShopForge stored. The file never says it is complete: **What the file proves** lists its limits — an administrator of the shop prepared it; a signed archive covers one register and at most one fiscal year; the server's archive is sealed by a signed record of the server, each record in it carrying its own signature; a register rebuilt from the server doesn't hold the drawer movements from before its rebuild, while the server's archive holds them all; an archive proves its own content, not that it is the whole ledger. The file's limits also say what an extract is: an extract of the current period, made at that date and time from the records the server holds, which doesn't replace the period's archive, produced when it closes. For each register covered by the server, the index says the extract is complete up to its record no. N, the last received, at that date and time, and that records made on the register afterwards aren't in it and stay on the register.

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The verification page

The **verification page** is the standalone verifier as a single web page, for the inspector or your accountant. It is in French, opens offline in any browser and makes no network call. It is in every inspection file (`verification/fiscal-verify.html`); the auditor manual (§ 7) gives the address to download it from. Open it, then choose a file:

- **An archive** of a register or of the server: one verdict, such as « Archive de Caisse 1 cohérente avec les clés qu'elle porte. », with the fiscal year, the period, the number of records and the register that signed it. A failed archive says what failed and where (« Chaîne des tickets rompue au n° 812. »). The server's archive isn't signed, and its verdict says so.
- **An inspection file**: the index checked against the files, then one verdict per archive, the registers first and the server's last. A register with records in the year and no valid archive in the file is named (« Aucune archive de Caisse 2 dans ce dossier. »); a register whose archive fails is shown from the server's copy. The tabs are « Clôtures », « Tickets », « Journal des événements », « Attestations » (a PDF is downloaded and opens in your PDF reader) and « Détails techniques », the verifier's own report, in English.
- **A monthly pack**: checked against its `contents.json` , every file present with its size and SHA-256. That shows the pack matches the hashes it carries, not who made it or that its figures are right.

A file the page can't read says why (« Ce fichier n'est pas un fichier ZIP lisible : il est peut-être incomplet ou endommagé. »). No verdict ever says the records are complete: an archive proves its own content.

Generate an archive

Hand over builds the archive of the register you are signed in on, one register at a time. Only an administrator can build one.

1. Choose the **First day** and the **Last day** (see the period line under the dates, above).
2. Click **Generate Archive**. The app first checks the register's fiscal chains, then shows "Building Archive...".
3. The summary gives the file's path, in the `archives` folder of the application's data folder, with **Copy Path**. **Existing Archives** lists the ones already built, each with its period. Each build is recorded in the JET Journal.

An archive can reach back 7 years. A period longer than one fiscal year is split automatically into archives chained to each other ("{count} archives generated, chained").

What is in the file. A ZIP holding the signed manifest, the signing keys and the register's identity; the records as JSON lines (transactions, daily, monthly and annual closures, cash sessions, drawer movements, received transfers, the journal, document events, deliveries, the history of the fiscal settings, quarantined records, sync events); one PDF per receipt, refund or avoir

(reproduced as signed, never marked duplicata); and the verification instructions, the French auditor manual, the list of the program's fiscal files (`docs/fiscal-manifest.json`, whose SHA-256 the editor's attestation cites), ShopForge's editor attestation and your signed attestation when they are available. The closure and report PDFs are not in it: their data is in the records.

A **filtered export**, also in **Hand over**, is different: it exports only the transactions, and the journal entries of an event code when you give one, chosen by date range, receipt range, type, payment method, customer or event code, with no documents. The date range is two days, both included, read in the shop's time zone, with the same line under the dates as the archive's; pick both days or neither (the same day twice is fine; one day alone, or a last day before the first, is refused under the fields). A date range alone is enough to export. The finished export shows its period, and so does its manifest.

Related

- Point of sale — the till: End of day, closures, replacing a register
- Fiscal settings
- Offline & synchronization

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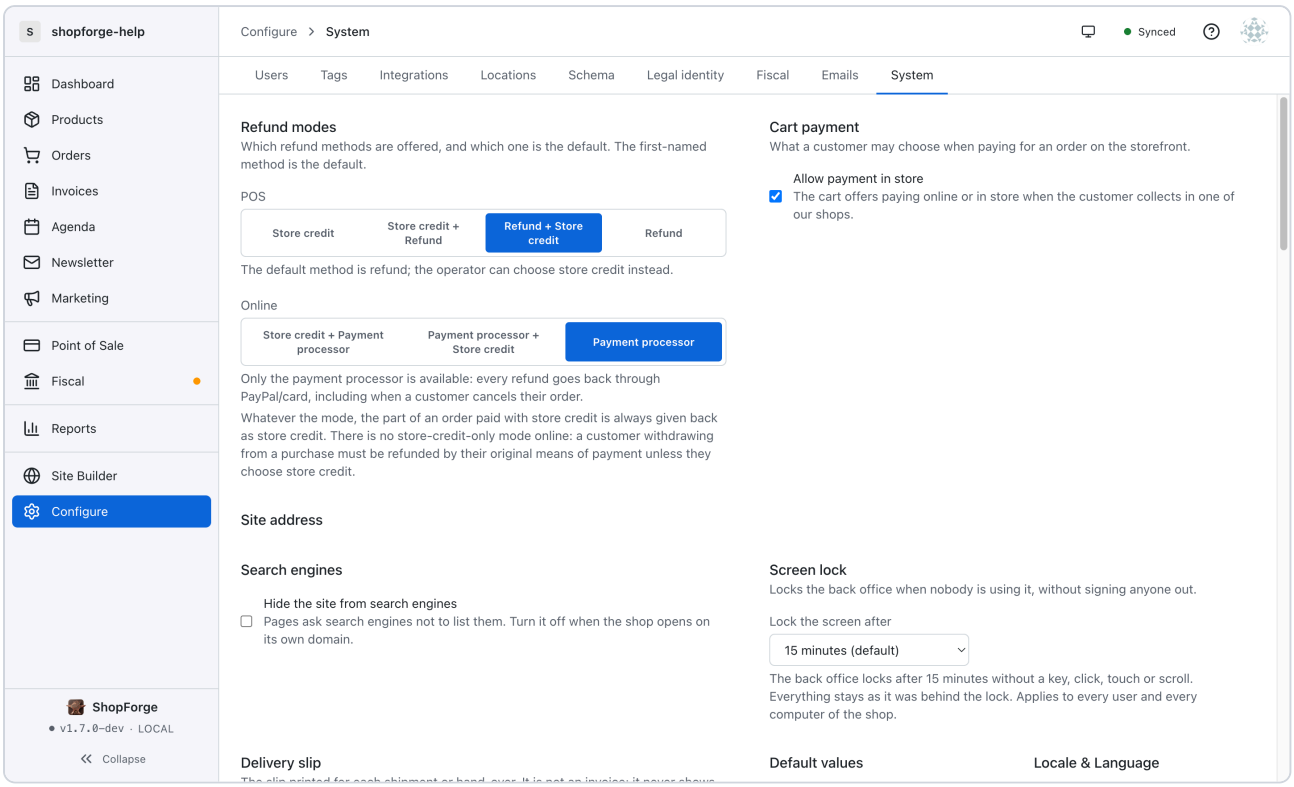
System config & POS



Configure → System (administrators only) groups the operational panels. Open it via the **Configure** sidebar entry.

Refund modes

"Which refund methods are offered, and which one is the default. The first-named method is the default." There is one choice for the **POS** and one for **Online** orders, each with a line underneath explaining it.

POS

Choice	What it means
Store credit	"Only store credit is available for refunds."
Store credit + Refund	"The default method is store credit; the operator can choose to refund instead."
Refund + Store credit	"The default method is refund; the operator can choose store credit instead."
Refund	"Only refund is available (no store credit)."

A register refuses to record a refund type the shop has turned off, even if its screen still offers it; the receipt's refund area then says "This refund type is turned off in the POS refund modes". Refund and store credit cannot both be turned off. The one exception is a sale made off premises, inside the period set under **Sales made off premises** in Cash drawer: it can always be refunded to its means of payment.

Store credit is for goodwill returns, such as a change of mind in the shop, where the law gives no right to a refund. When the law gives the customer the right to their money back, it goes back by the means of payment they used, unless they ask for store credit. That is the case of a product returned because it is defective (the legal guarantee of conformity) and of a withdrawal from a sale made off premises. A shop on **Store credit** alone can't refund a defective product at the till: choose a mode that includes **Refund**.

Online

Choice	What it means
Store credit + Payment processor	Store credit by default; in order management you can choose the payment processor instead. A customer cancelling their order chooses, with store credit preselected.
Payment processor + Store credit	The payment processor by default; in order management you can choose store credit instead. A customer cancelling their order chooses, with the payment processor preselected.
Payment processor	"Only the payment processor is available: every refund goes back through PayPal/card, including when a customer cancels their order."

"Whatever the mode, the part of an order paid with store credit is always given back as store credit. There is no store-credit-only mode online: a customer withdrawing from a purchase must be refunded by their original means of payment unless they choose store credit."

Saving toasts "Refund modes saved". The POS choice follows the offline-first model and queues "PATCH /v1/pos/config" through the outbox; each change is recorded in the JET Journal. The online choice is saved directly, so it needs a connection ("Failed to save the online refund mode — it needs a connection").

Cart payment

Allow payment in store decides whether the storefront offers a customer the choice of paying in the shop when they collect an order. A line underneath explains the current setting:

- **On** — "The cart offers paying online or in store when the customer collects in one of our shops."

- **Off** — "The cart offers online payment only, including for orders collected in store."

When it is off, a customer collecting in store sees the pickup option card read "...free. Online payment only", and the payment step offers online payment only — the same single notice a home-delivery order gets. It does not change *how* the money is collected when it is allowed: staff still use **Pay Order** to settle the order at the till, which is described in Orders.

The setting is on by default, so a shop that has never touched it keeps offering payment in store. Turning it off is also enforced by the server, so a customer with an old browser tab open cannot still place such an order.

Saving toasts "Cart payment settings saved". It needs a connection, because it is saved straight to the server rather than queued.

Site address

Site address is the address the public site answers at, and the address every link made for the shop starts with: the links in emails, the canonical address of each page, the sitemap. Under the title, "The site answers at" shows the address in use. Only administrators see it.

A new shop on production starts on its **platform address**, `<shop>.sfp.kapide.com`. On the other environments the address is fixed ("On this environment the address is fixed.") and there is no field.

Moving the shop to its own domain

1. Once the domain's DNS can point at ShopForge, type it in **Your own domain**, for example `www.example.com`: no `https://`, no port, no path. Save with the System tab's save button. The line under the field reads "Until your own domain is live, the site stays at `<platform address>`. Leave the field empty to use that address."
2. The tab then shows the state and the records to add at your DNS provider ("Add these records at your DNS provider"): the **Certificate validation** record and **The address** record, each with its type (CNAME; an ALIAS for a bare domain such as `example.com`), name and value. Add both. Keep the validation record afterwards: "the certificate renews through it".
3. The state moves on when the tab checks: each time you open it (at most every 5 minutes) and when you press **Check now**. The tab says when it last did.

State	What it means
Waiting for DNS	The certificate for your domain is not issued yet: the records are not at your DNS provider, or have not spread. After a week the tab adds "The DNS record was not found. Check it with your DNS provider." and keeps checking.

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State	What it means
Certificate issued, waiting for the site to be published on this address	The certificate is ready. "The ShopForge team now has to publish the site on this address." Nothing to do on your side.
Live	Your domain answers with the site, and it is the site address. "`<platform address>` now redirects to this address." The records are now ones to keep ("Keep these records at your DNS provider"), and the line under the field reads "Leave the field empty to go back to `<platform address>`."

Until the state is **Live**, every link keeps the platform address. When it becomes live, the product, artist, brand and event pages get the new address on their own; the other pages follow at the next **Publish site**. The platform address then sends visitors to the same page on your domain.

Refused addresses

Under the field, after saving: "Enter the address without https://, a port or a path, for example www.example.com." (not an address); "An IP address cannot be the site address."; "A wildcard cannot be the site address."; "Enter your own domain, not a kapide.com address."; "This address is already used by another shop." Saving needs a connection ("Failed to save the site address" if it fails).

To go back to the platform address, empty the field and save. A change of address while another is waiting replaces the waiting one.

Search engines

Hide the site from search engines is for a shop that trials its site on a temporary address while its real site stays live. It is off by default. The line under it reads "Pages ask search engines not to list them. Turn it off when the shop opens on its own domain."

When it is on:

- every page of the public site asks search engines not to list it (`noindex`), while its links can still be followed;
- the site's `robots.txt` has no sitemap line and does not block crawling, so that search engines can read that request;
- no sitemap is made.

When it is off, the site is listed as usual, with its sitemap.

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Changing it does not alter the pages already published at once. The product, artist, brand and event pages get the new setting on their own; the other pages follow at the next **Publish site**. Saving toasts "Search engine setting saved" and needs a connection, because it is saved straight to the server rather than queued.

Screen lock

Screen lock sets when the back office locks itself. One row, **Lock the screen after**, with **Off**, **5 minutes**, **10 minutes**, **15 minutes (default)**, **30 minutes** or **1 hour**. The line under it follows the choice: "The back office locks after 15 minutes without a key, click, touch or scroll. Everything stays as it was behind the lock. Applies to every user and every computer of the shop." With Off it reads "The screen never locks by itself. Staff can still lock it from their user menu."

It is the shop's one value, for every user and every computer. A computer reads it through the settings sync, so one that is offline uses the last value it received, and a change takes effect at the computer's next idle check. It is not a fiscal setting: no reason, no manager approval and no signed event. Saving toasts "Screen lock setting saved" and needs a connection, because it is saved straight to the server rather than queued.

What the lock does, and how staff unlock it, is in Lock the screen.

Default values

"Default values applied when creating new entities." For each one, **None (platform default)** or a specific status:

- **Default product status** — Draft, Active or Published.
- **Default article status** — Draft, Active or Published.
- **Default agenda entry status** — Draft, Active or Published.

Saving toasts "Default values saved"; the backoffice applies these defaults when a new product, article or agenda entry is created.

Two more rows set the shop's **SKU**, the code ShopForge gives every new variant:

- **SKU prefix** — letters and digits, 1 to 16, used exactly as you type it (`bs` gives `bs-560402` , `BS` gives `BS-560402`). Changing it keeps the number going: the next SKU takes the new prefix and the next number.
- **Next SKU** — what the next generated SKU will be, for example `bs-560402` . It is read-only: it comes from the server and is refreshed when the back office syncs. The number is not reserved.

The number is per shop and only goes up. A SKU that comes from an import and looks like `<prefix>-<number>` moves the counter past its number, so the series continues; a SKU with

anything else after the number (`bs-195755-1`) does not. Nobody types a SKU. A SKU is made when the product is synced (see Products). With no prefix, no SKU is made.

Locale & language

The **Locale & Language** panel holds the tenant-side default for the same settings managed per user in your preferences: **Language** (English / Français), **Date format** and **Timezone**, plus the shop's default **Currency**. These defaults apply whenever a user chooses "Use tenant default". (For your own settings, see Your preferences.)

The **Date format** list starts with **Automatic (follows the language)**, the choice when the tenant has none: dates then follow each user's interface language (EU short in French, ISO in English). Pick a preset to make it the default for everyone who has no personal choice; pick Automatic again to go back.

Newsletter config

The **Newsletter** panel sets the storefront's scheduled sends: **Frequency** (Weekly, Every two weeks or Monthly), **Language**, and **Send newsletter on** (Monday–Sunday). Saving toasts "Newsletter configuration saved". Leaving the send day empty removes the scheduled send.

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POS offline settings

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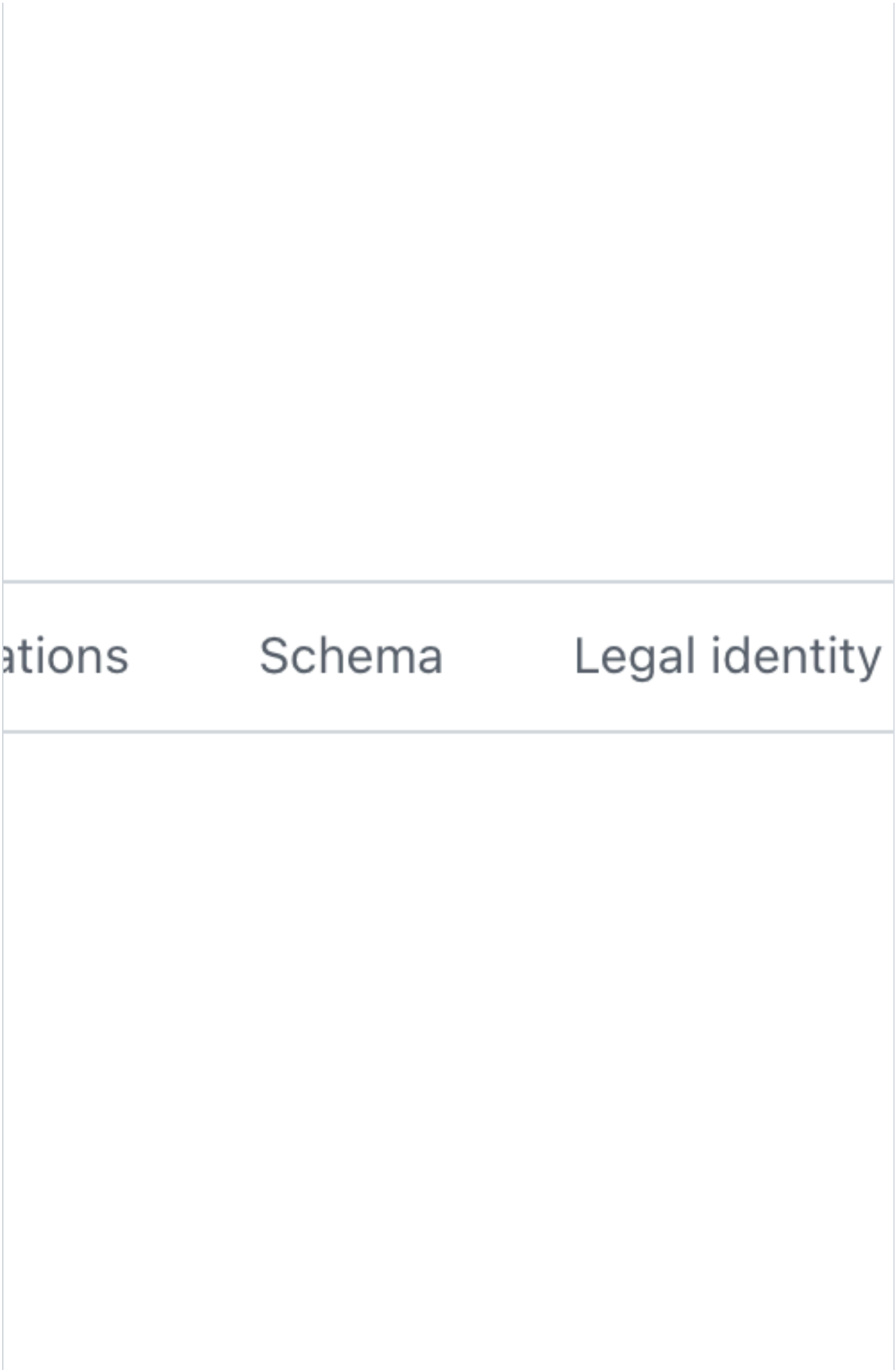

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These settings, in the **POS offline settings** panel, decide how long a register may work **offline**:

- **Maximum offline duration (hours)** — from 1 to 168, 72 by default. It covers a weekend outage of a small shop's connection while keeping the server's copy at most days behind.
- **At the offline limit** — **Block new sales until the connection returns** (default) or **Warn only**. Refunds, cash movements and closing are never blocked. Under **Block**, a manager (admin user) can extend the limit once by 24 hours. In France **Warn only** is not offered: the panel shows **Block**.
- **Refuse sales while a daily closure is missing** — on by default. When an earlier business day has activity on a register and no daily closure (Z), the register refuses new sales until the closure is made. Refunds, cash movements and closures stay possible. Turn it off to let sales go on without it. The business day starts at the hour set in Fiscal settings. What the cashier sees is described in Point of sale.

The limit counts from the last time the register reached the server, so the hours a register spent switched off count. Each day can be closed offline: the Z report is signed on the register and the server checks it when the connection is back (see Working offline). The 72 hours are Kapïdé's product commitment, not a legal figure.

Each change is recorded in the JET Journal.

Manager self-approval

A manager may approve their own actions decides whether a manager can approve their own action, such as correcting a payment, by re-entering their PIN or password. It does not apply to a refund, a cancellation or a manual discount above the threshold, which any staff member approves, themselves included. Changing it asks you to re-authenticate. Until it is set, it is allowed only while the shop has a single manager.

Cash drawer

The **Cash drawer** panel sets, for each kind of cash movement a cashier records — **Cash in**, **Cash out**, **Petty cash**, **Safe drop**, **Variance adjustment** — the rules the registers apply (FR-186):

- **Reasons (one per line)** — the reasons the cashier chooses from for that type, each a short code of at most 40 characters, shown as typed. Leave the list empty to let the cashier type a free note only. The defaults name the usual cases (bank change, bank deposit, supplies, postage…).

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- **Manager approval** — **Never**, **Always**, or **Above an amount** (in euros). When required, a manager approves the movement before the register records it, and the approval is signed with the movement.
- **Variance at the close** — the **reasons** a cashier chooses from when the counted cash differs from the expected cash (one per line, at most 20 codes of 40 characters), and the amount above which a **manager approves** the close (€10 by default).
- **Handing cash to another till** — **Wait for the server**: when a till closes by handing its cash to another, how long it waits for the server to confirm the transfer, from 5 to 120 seconds (20 by default). After that, the session stays open and the cashier can try again or count the cash. A register applies a new value the next time its POS page opens.
- **Sales made off premises** — **Always refund an off-premises sale to its means of payment**, **For** a number of **days after the sale** (1 to 365, 14 by default). A sale made at an **Outside Walls** location (a fair, a market, a customer's home: see Shop Locations) can then be refunded to the means of payment it was paid with during that period, counted from the moment the sale was recorded:
  - even when the shop otherwise offers only store credit — store credit is still offered beside it when the shop allows it, but never preselected;
  - without an approval for being outside the return window; the approval above the refund amount threshold still applies.

  Sales at a **Pro Client** location are never covered: the buyer is a professional. The place of sale is the one the receipt recorded, so renaming or deactivating the location later changes nothing. Turn it off if all your off-premises sales are at fairs or salons, where the customer has no withdrawal right.

Save applies the panel with the others. Each change is recorded in the JET Journal, and every register applies it once it has synchronized the configuration.

Software updates

ShopForge does not update itself: you install a new version by hand, and the back office stops you from working with a version that is behind.

- **When it checks.** The installed app (not a developer build) looks at the list of published versions shortly after it starts and again every six hours while it runs.

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- **What you see.** At the start, if a newer version than the one running is published, the whole screen is blocked: "New version available: {version}". "This version is no longer supported. Please download and install the latest version to continue." It cannot be dismissed. **Download here** opens the download for your computer and ShopForge closes ("ShopForge will close; open the downloaded installer to update."): open the installer to update. If the link cannot be opened: "The download link could not be opened. Please try again." A version published while you are working blocks the running session too, once the register is free: a basket with items, a sale being signed or a PayPal payment in progress finishes first, then the screen is blocked.
- **Offline, or no answer.** A check that fails or takes more than a few seconds never blocks: the app opens as usual.
- **Which version is running. Software**, in Fiscal → Inspection, shows the version, and its **Technical details** the **Application version** and the **Software versions**; the line shown when you open a register reads "Version {software} · fiscal {major} ({fingerprint}) · configuration {config}". Starts and updates are recorded in the JET journal as "Software started" and "Software updated".

Diagnostic logs

After you sign in, the back office sends its diagnostic logs to ShopForge automatically, about every 10 minutes while it is open and once more when you quit. There is no setting and no button for it. It lets ShopForge find out why something failed on a register without having to ask the shop for its files.

- **What is sent.** The log lines (information level and above) of the UTC day on which this version first ran on the computer, from the start of that day, and everything written after. No older logs are sent.
- **What the logs contain.** Technical events of the app (starts, sync, errors) and the identifiers needed to trace a problem (shop, user, app version). They can contain personal data of customers or staff when an error involves them.
- **How long they are kept.** The computer keeps its own log files for 15 days. The uploaded copies are removed about seven days after upload, and in any case within 14 days.
- **Who can read them.** Only ShopForge operators, with their own access to the storage. No screen of the back office or of the shop shows them.

Related

- Lock the screen — what the lock does and how staff unlock it
- Your preferences — the same locale settings at your own level, with "Use tenant default"
- Newsletter — authoring and sending newsletters
- Point of sale — refunds — refunds from the sales side

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Memberships

A membership gives a customer a standing percentage off, for as long as it runs. You define the **tiers** in **Marketing → Membership tiers**, and you grant a membership from the customer's profile in **Configure → Users**. This page is for administrators; employees can see a customer's memberships but cannot change them.

Anything marked **proposal, pending owner confirmation** below is how the application works today, but the shop owner has not confirmed the rule yet; it may change.

How a membership works

- A **tier** has a **Name**, a **Discount (%)** and a **Term (months)**. A customer's **membership** is a tier with a start and an end. A customer holds at most one membership per tier.
- The customer's discount is the **highest** percentage among the memberships still running. Percentages are never added together. A membership gives nothing before its start or after its end.
- **When a membership starts:**
  - granted by an administrator, or sold at the till in a shop: at once;
  - bought online: once the 14-day withdrawal period is over, counted from the order. It starts at 00:00, shop time, on the day after the period's last day. A period that ends on a Saturday, a Sunday or a public holiday runs to the next working day. An order on 20 November starts on 5 December;
  - sold at the till during an off-premises session (a location of type *Outside Walls*): the same rule, counted from the sale. When **Always refund an off-premises sale to its means of payment** is off (**Sales made off premises**, in Cash drawer), it starts at once.

  Its term counts from its start, so the customer gets all of it.
- The percentage is fixed on the day the membership is granted. Editing a tier later changes the memberships granted or renewed from then on; memberships already granted keep the percentage they were granted with. *(Proposal, pending owner confirmation.)*
- There is no longer a field to type a discount on a customer. A discount typed on a customer before memberships existed keeps applying until the customer gets a first membership; the first membership replaces it, and the old value is kept in the customer's record. *(Proposal, pending owner confirmation.)*

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- The discount applies at the till and in the online shop. In the online shop the membership discount is taken first, then a promo code. At the till it is the **Discount card** line, then the promo code typed on the sale, then a **manual discount**, each on what is left of the step before (a percentage manual discount is a percentage of what is left, also without a code). See Point of sale.
- A membership itself takes no discount: buying or renewing one costs its price, online and at the till, whatever membership the customer already holds. No membership discount, promo code or manual discount lands on its line; at the till a manual discount goes to the other lines.

Create or edit a tier

1. Open **Marketing** and choose the **Membership tiers** tab. Only administrators see **Add tier**.
2. Click **Add tier**, or click a tier in the list to edit it.
3. Fill in:
   - **Name** — unique in the shop, whatever the capital letters. *(Proposal, pending owner confirmation.)*
   - **Discount (%)** — above 0, at most 100. A comma or a point is accepted as the decimal mark.
   - **Term (months)** — how long one purchase lasts, in whole months, from 1 to 120. It starts at 12. *(Whole months and the default of 12: proposal, pending owner confirmation.)*
4. Click **Save**.

A tier has no price: the price is on the product that grants it. The list works offline; your change is saved on this computer at once and sent to the server as soon as you are online.

If the server refuses a change after you left the window (for example, a name another register has just taken), the sync indicator at the top of the screen turns red and lists the change as **failed**, with the server's message. The next synchronisation puts back the server's version of the tiers.

Delete a tier

Open the tier and click **Delete tier**. A tier cannot be deleted while a customer holds it, even through a membership that has ended, or while a product of the Membership category names it, whatever the product's status. The window first counts the customers who hold the tier on this computer: if there are any, it says so, with the number of customers, and offers no confirmation; edit the tier instead. The products are checked by the server: if one names the tier, the deletion is refused after you confirm, the sync indicator at the top of the screen turns red and lists the change as **failed**, with a message that says which (customers, products or both) and to give

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those products another tier first. A tier that nobody holds and no product names is deleted after you confirm. *(Proposal, pending owner confirmation.)*

Grant a membership

1. Open **Configure → Users** and click the customer. The **Memberships** section lists what the customer holds: **Tier**, **Discount**, **Period** ("From {start} to {end}", the end being the last day held) and **Status**: **Active**, **Expired**, or "Starts on {start}" for a membership that has not started yet. The one ending soonest comes first.
2. Click **Grant a membership** (administrators only).
3. Choose the **Tier** and the **Valid until** day.
4. Click **Grant a membership**.

- The membership runs to the **end of the day** you pick, in the shop's time zone. A day already past is refused.
- If the customer already holds that tier, the new date **replaces** the old one; no second membership is created. *(Proposal, pending owner confirmation: the alternative is to extend it, as a renewal does.)*
- There is no field for the percentage: it is the tier's.
- The grant works offline. The customer's profile shows it at once, and the discount applies at this register from then on. It reaches the other registers and the online shop after the next synchronisation. If the server refuses it later (for example, because the date passed while you were offline), it appears as **failed** in the sync indicator.
- Today the section appears on a customer's profile only.

Find the members

On the **Users** list, the **Filter by role or membership** selector lists, indented as a tree:

- **All**,
- **Staff**, with **Admins** and **Employees**,
- **Customers**, with **Non-members** — customers with no membership running, including those whose only membership has ended or has not started yet,
- **Members** — everyone, staff included, with at least one membership that has started and still runs — and, under it, one choice per membership level, for the people holding that level.

A customer whose only membership has ended is in **Customers** and **Non-members**, and in no **Members** choice. The filter combines with the search box. The **Membership** column shows the levels a user holds now and the date the first one ends.

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Memberships bought online

A membership can be sold as a product that names a tier. When the order is paid, the customer receives the membership:

- it starts once the 14-day withdrawal period is over, counted from the order (see How a membership works), and gives no discount before that day. In the cart, a line under it says so: "Starts on 5 Dec 2026, after the 14-day withdrawal period." The customer's account lists it under **Memberships**, in **My information**;
- it ends one term after its start;
- a renewal of a tier the customer still holds extends from the current end date and keeps its start: a renewal extends, it never shortens. A tier that has lapsed starts again at the new start;
- one membership per order line, and one membership per online order: a second one added to the cart replaces the first. *(Quantity of 1, no delivery: proposal, pending owner confirmation.)*

Refunding a membership bought online. A membership is refunded only at the customer's request, from the order's **Refund** window in the back office. Refunding the membership line always takes the membership back, whatever the amount: the previous end date is restored, or the membership is removed if the purchase created it. To refuse, do not refund the line: the membership stays.

- **Within its withdrawal period** (the 14 days from the order that set its start), the customer gets the **full price** back. The amount cannot be edited: the membership has given no discount yet.
- **After it**, you choose the amount, from 0 up to the price paid minus the member discounts the customer has already obtained with this membership (online orders and sales at the till). The field starts at that net and says "Amount to refund (at most €27.00: price paid less the discounts it gave)", with under it "Refunding this line takes back the membership it granted, whatever the amount; 0 takes it back with nothing paid out." A refund of 0.00 € pays nothing out and still takes the membership back. The amount is checked again when you confirm, because an order placed meanwhile can raise the discounts.

The cancel window on the customer's order page shows the price paid, the discounts deducted and the amount refunded.

An order of memberships (and gift cards or donations) only is completed as soon as it is paid and cannot be cancelled: the way back is a refund of the line. *(Proposal, pending owner confirmation.)*

To sell a membership, add the product in the fixed category "Membership", then choose the **Tier granted** in the **Membership** section. That section is offered only for a product in that category, which ShopForge defines (you cannot edit or remove it). Several products can grant the same tier; each has its own price (the tier has none). A membership does not ship, so the product form

asks for no weight or size. It has no stock either: the form shows no artists, brands, supplier, barcode, old price or stock field, and a membership is never out of stock. A product that is still a draft can be saved before a tier is chosen; to publish it you must choose one. The product list and the choices work offline; your change is saved on this computer at once and sent to the server as soon as you are online. If the tier was deleted meanwhile, the server refuses the change and the sync indicator tells you to open the product and choose another tier.

At the till

When you attach a customer to a sale, the till reads their memberships from its own copy of the data and applies the highest one still running, as the **Discount card** line. It uses the clock of the computer, with no network, so it works offline.

- A membership that has ended, or has not started yet, gives **no discount**, and nothing is shown to say why.
- A membership that ends while the basket is open stops applying when you click **Checkout**: the till reads the clock again at that moment, so the amount to pay can change. If it does, the payments you entered no longer match: enter them again.
- A membership granted from another register, or bought online, reaches this till at the next synchronisation. Until then the till does not know it.

Selling a membership at the till

A product that sells a membership can be rung up at the till like any other product, with these rules:

- **Attach the customer first.** The till refuses to take payment for a membership without a customer: "Attach the customer who buys this membership before taking payment."
- **One at a time.** A membership line with a quantity above 1 is refused: set the quantity to 1, or ring a second sale for a second term. *(Proposal, pending owner confirmation.)*
- **The tier must be known to the register.** If the tier of the product is not among the tiers this register holds (deleted, or not yet synchronised), the till refuses the sale, so that nobody pays for a membership that grants nothing. Synchronise the register or ask a manager.
- **The membership is granted when the sale reaches the server**, with its start and end counted from the sale, not from the synchronisation: a sale made offline and synchronised the next day ends on the same date. A sale in a shop starts on the sale's business day; a sale during an off-premises session starts after its withdrawal period (see How a membership works). The customer's discount applies from their next sale, once the register has synchronised the membership. *(Proposal, pending owner confirmation.)* If the grant fails for a passing reason, the server retries it by itself; if it keeps failing for several days, an administrator grants the membership by hand from the customer's profile.

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- **The member discount of the sale is recorded** in the signed ticket (the tier, the rate and the amount of the membership discount), without being printed on it.

Refunding a membership sold at the till

A sale of a membership is refunded, never cancelled. Its receipt offers no **Cancel receipt**, and a line says why: "A sale of a membership is refunded, not cancelled." Refunding or crediting (avoir) the membership line takes the membership back, whatever the amount: the previous end date is restored, or the membership is removed if the sale created it. A refund of other lines of the sale leaves it in place and deducts nothing. A membership is refunded only at the customer's request.

Before you confirm, the receipt's **Membership taken back** box shows the price paid and the member discounts the customer has already obtained with this membership, online and at the till. Then:

- **for a sale in a shop, or an off-premises sale past that period**, you choose the amount from 0 up to the price paid minus those discounts. The field starts at that net and carries the same two lines as online. 0.00 € takes the membership back with nothing paid out;
- **for an off-premises sale within its period** (the days set under **Sales made off premises**), the full price is refunded, with no field.

The register works the discounts out from its own copy of the data, so this works offline; a discount it has not received yet is not deducted.

The membership is taken back when the refund reaches the server; if that fails, the server tries again and, after 7 days, flags the refund record (`membership_revoke_failed` ; no screen lists these flags yet) so that an administrator can correct the membership from the **Memberships** section of the customer's profile (**Configure → Users**). *(Proposal, pending owner confirmation.)*

Troubleshooting

- **The customer has a membership but gets no discount at the till.** Open the profile and check that the **Status** is **Active**; a membership ends at the end of its last day. Then check the sync indicator: a register that has not synchronised does not know a membership granted elsewhere.
- **A membership bought online gives no discount yet.** It starts once the 14-day withdrawal period is over: its **Status** says "Starts on {start}".
- **Delete tier is refused.** A customer still holds the tier, or a product of the Membership category names it; the message says which. Edit the tier, wait until no customer holds it, and give those products another tier first.
- **A tier or a grant shows as failed in the sync indicator.** The server refused it; read its message, correct the change and make it again.

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- **I do not see Add tier or Grant a membership.** Only administrators can change tiers and grant memberships; employees can see them.

Related

- Users & roles — the Users list and the customer profile
- Point of sale — the sale, the discounts and working offline
- Offline & synchronization — what is sent when you are back online

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Gift cards (administrators)

This page is for administrators. The employees' page, **Gift cards**, explains the daily work: reading the cards of an order, printing a physical card, finding a card and taking one at the till.

Anything marked **proposal, pending owner confirmation** below is how the application works today, but the shop owner has not confirmed the rule yet; it may change.

Create a gift card product

A gift card is a product like any other, with a few particular fields. In **Products**, add a product and choose the type **Gift card**; it goes into the fixed category "gift cards", which you cannot change.

1. **Delivery** — **Virtual (sent by email, not shipped)** or **Physical (shipped like any product)**. A virtual card is shown to the buyer or emailed to a person the buyer names; a physical card is printed from the order, packed and shipped.
2. **Amount** — **Fixed value (the price of this product)** or **Chosen by the customer**. A chosen amount stays between the bounds ShopForge sets (EUR 5.00 to EUR 1,000.00, in whole cents); the same bounds apply to donations, but are separate settings.
3. **Validity (months)** — a whole number from 1 to 120, counted from the day the card starts (see **When a card starts**). A gift card product without a validity cannot be bought.
4. **Expiry notice** — free text, optional, shown to the buyer with the card and printed on the slip of a physical card. You are responsible for it: the application enforces no legal limit on the validity and does not write the notice for you.

A gift card has no stock: it is never out of stock. A card is a multi-purpose voucher: its VAT is due when it is spent, on the goods it pays for, not when it is sold. So the sale of a card has no VAT rate, at the till and online, and there is nothing to set for it in **Configure → Fiscal → French VAT and business day**: an entry for the category "gift cards" there changes nothing. The sale is in no VAT row of the receipt or the closures; it has its own row, **Gift cards, VAT due when used**. Its invoice line is exempt, with the reason printed.

A customer must be signed in to buy a gift card online, and an online purchase of a card is paid online, by card or PayPal, never on pickup in the shop. The register sells cards too.

A gift card has no artist, brand, barcode, old price, supplier or stock, so the product form does not show those fields.

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When a card starts

A card bought **online** does not always start the day it is paid, because the buyer has 14 days to withdraw from a distance sale.

- **The express request.** When the basket holds a gift card, the checkout shows an unticked box: "I want my card to be usable immediately, and I acknowledge that I lose my withdrawal right once it has been fully used." The order keeps the text the buyer was shown, whether the box was ticked and when, as proof of the request.
- **Box ticked:** the card is usable from the day it is paid.
- **Box not ticked:** the card starts after the 14-day withdrawal period: at 00:00 shop time on the day after the period's last day. A period that ends on a Saturday, a Sunday or a public holiday runs to the next working day. A card sent by e-mail counts the period from the order: an order on 20 November starts on 5 December. A **physical** card, posted or collected in the shop, counts it from its receipt (below). Before that it cannot be spent, online or at a till. The e-mail **Order confirmed** says "Usable from {date}" in the shop's default text, and so does the card's e-mail when it is sent to a recipient. A shop that edited the **Order confirmed** template and removed the `{{giftCardStartLine}}` field no longer says it; only the express request is added back (below).
- **A physical card, box not ticked,** waits for its receipt. Until you mark its order **Delivered** (or **Completed** for a pickup), it has no start date and no expiry date: the order, **Products → Gift cards** and the card slip say "Usable once the 14-day withdrawal period that follows its receipt has ended." and "Valid for {months} months from the day it becomes usable." The slip is printed before the card is posted, so it can't print a date. When you mark the order **Delivered**, the card starts after the 14 days that follow, and its expiry counts from then: delivered on 24 November, it starts on 9 December. **Mark a physical card's order delivered** once it arrives: the carrier's tracking doesn't do it, and until then the card can't be spent and the buyer's withdrawal period stays open. A pickup paid at the till counts from that sale. Ticked, a physical card is usable at once, and only its withdrawal period counts from the receipt.
- A card sold **in a shop** at the till starts at once: the right of withdrawal covers distance sales and off-premises sales. A card sold at the till during an **off-premises session** (a location of type *Outside Walls*) starts like a card bought online, counted from the sale. When **Always refund an off-premises sale to its means of payment** is off (**Sales made off premises**, in Cash drawer), it starts at once.

Until it starts, the card is **Not usable yet** in **Products → Gift cards** and under its order line, and it still holds its full balance. A till that meets it says "This card can be used from {date}." and the checkout says the same; nothing is spent. For a physical card not yet received, both say "This card can be used once the withdrawal period that follows its receipt has ended."

The confirmation email copies the express request when the box was ticked. If the shop edited the **Order confirmed** template and removed the `{{expressRequestLine}}` field, the application

adds the line at the end of the e-mail anyway: it is the buyer's durable record of the request.

Expiry

An expired card cannot be spent. The expiry date is fixed when the card is created, **from the day it starts**, and the last day the card can be used is the one the screens show. A card that starts at the payment (box ticked, or sold in a shop) is usable through the same date, the validity later. A card that starts at 00:00 after the withdrawal period (box not ticked, or an off-premises sale) is usable through the day before: starting on 5 December with 12 months, its last day is 4 December of the next year.

Cancel a card

Open **Products → Gift cards**, find the card and click **Cancel card**. A window names the card, tells you what balance it still holds ("It still holds 20.00 €, which will be lost to the customer") and says that it can no longer be used, online or at a till, and that this cannot be undone. Confirm with **Cancel the card**.

The cancellation is sent like any other change: done offline, it is kept on this computer and takes effect when it is sent. A till that has not synchronised can still accept the card until then; the sale is then flagged as **overspent**.

Reissue a lost physical card

When a customer loses a **physical** card, open the order, find the card under its line and click **Lost card: cancel and reissue**. A window names the cancellation and the balance and the expiry date the new card will have, and asks you to confirm.

- The lost card is cancelled for good and a **new card with a new code** is issued on the same order line, with the **same balance** and the **same expiry date**. The new code is shown at once and its slip is printed, ready to send.
- It **needs a connection**: only the server can end the old code and start the new one in one step. Offline, the button says "Needs a connection" and does nothing; nothing is queued. *(Proposal, pending owner confirmation.)*
- A register that is offline at that moment can still accept the old code until it synchronises; the sale is then flagged as overspent.
- Only a physical card that is still active and holds a balance can be reissued. A virtual card sent to a recipient is corrected by the buyer from their order page, not reissued here.
- The new card keeps the original amount as its initial amount. If the lost card had spent part of its value, the new card counts as used and the sale of that line is refused for refund; if it was reissued whole, the sale is refunded like any other whole card (the new card is the one cancelled).

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How refunds work

- **Refund of a card sale.** A card that has not been used is cancelled and the money goes back by the usual refund. A card that has been used, even in part, is not refunded. A card that expired unused is not refunded either; that is for the shop owner. *(Proposal, pending owner confirmation.)*
- **Refund of goods paid with cards.** Each part goes back to where it came from: the part a card paid goes back to that card (same expiry date), the store credit used goes back as store credit, the rest goes back to the payment provider. When the refund is only part of the order, the order in which the parts are taken is: store credit first, then the gift cards, then the provider. *(Proposal, pending owner confirmation.)*
- For each card that paid, the customer chooses whether its part goes **back onto the card** (preselected) or **as store credit**, online and at the till. If a card that paid has since **expired** or been **cancelled**, there is no choice: its part goes to the customer as store credit, with the reason recorded, and the refund goes through.
- The refund dialogs, in the back-office and on the customer's order page, say where each amount goes before you confirm.
- An order of gift cards and memberships only is completed as soon as it is paid and cannot be cancelled; the way back is a refund of the line, or the customer's withdrawal.
- At the till, cancelling or refunding a sale that includes a gift card is not available yet. *(Proposal, pending owner confirmation.)*

Withdrawal and the freeze

A customer who declares a withdrawal on an order that holds a gift card freezes that card. Refund it with the reason **Withdrawal (14 days)**, within the 14 days of the sale, or of its receipt for a physical card. A physical card's 14 days don't start until its order is marked **Delivered** or **Completed**.

- **The freeze.** From the declaration, the card of each declared line shows **Withdrawal in progress** and cannot be spent, online or at a till: "This card can't be used: a withdrawal is in progress." Only the declared quantity of cards on a line is frozen, not every card of the line. The freeze ends with the refund, which cancels the card; nothing makes the card spendable again (an administrator's cancellation or the expiry date also end the status, without making it spendable). A declaration made after the card's 14 days freezes nothing, and the card follows the rules above.
- **Card not started, or started and never used:** refunded in full, and cancelled.
- **Card started with the box ticked, partly used:** only the **unused balance** is refunded and the card is cancelled. The refund dialog says "Withdrawal: refunds the unused balance of {amount} and cancels the card." and lowers the amount by what was spent.

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- **Card started with the box ticked, fully used:** it cannot be withdrawn. The dialog says "This card has been fully used: it can't be withdrawn." and **Refund {amount}** stays disabled.
- **An amount that the part already spent leaves nothing of:** the dialog says "This amount isn't above what the card has already spent ({spent}): a withdrawal refunds only the unused balance." and the refund is not sent. Ask for the whole line, or for more than the spent part.
- **Card started with the box not ticked:** refunded in full, used or not: the buyer was never asked to give up the right.
- **Any other reason, or after the 14 days:** the usual rules above (a card that has been used, even in part, is not refunded). After the 14 days, a line a withdrawal declared inside the period keeps the withdrawal rules.

Sales flagged because of a gift card

When a till sale paid with a gift card reaches the server, the sale always stands. If something about the card was wrong, the sale is flagged. The flag is stored on the sale record; no screen lists these flags yet, and the card list shows only the **overspent** figure. *(Proposal, pending owner confirmation.)*

- `voucher_overspent`: the card could not cover the whole amount (it was spent elsewhere, cancelled or expired meanwhile). The card was debited what it held, and the part it could not cover is shown on the card as **overspent**; the shop absorbs the difference.
- `voucher_unknown`: the sale names a card the server does not hold. Nothing was debited. Check which card the customer used.
- `voucher_debit_failed`: the server could not debit the card for seven days. The sale stays as it is and the card is **settled by hand**: ask the shop owner.

What needs the owner

The shop owner has still to confirm: how an expiry month-end is counted (for example, whether a card bought on 31 January with a validity of 1 month expires on 28 February or on 3 March), how long the recipient's email address is kept, whether a lost card may be reissued without a connection, and the order of the parts of a partial refund. Until then the application works as described above.

previous: Memberships

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Gift cards

A gift card is a code worth an amount of money. Whoever holds the code can spend it, in the online shop or at a till, until its balance is used up or its expiry date has passed. It is not store credit: store credit belongs to one customer, a gift card belongs to whoever has the code. This page is for employees; some actions are for administrators only, and the administrators' page is **Gift cards (administrators)**.

Anything marked **proposal, pending owner confirmation** below is how the application works today, but the shop owner has not confirmed the rule yet; it may change.

What a gift card is

- A card has a **code**, a **balance**, an **expiry date** and a **status**: **Active**, **Not usable yet**, **Withdrawal in progress**, **Used up**, **Expired** or **Cancelled**. A card bought online starts the day it is paid only when the buyer ticked the express request at checkout; otherwise it is **Not usable yet** until the day after the 14-day withdrawal period, with its full balance. A card sold in a shop at the till starts at once; one sold during an off-premises session starts after the withdrawal period (see the administrators' page, **When a card starts**).
- A card is **virtual** (the code is shown to the buyer or emailed to the person the buyer chose) or **physical** (printed, packed and shipped like any product).
- A card can pay for goods and for delivery, never for another gift card or for a donation. Several cards can pay one order; what a card does not use stays on it.
- The code of a card is a secret. Staff see it in full in the back-office; it is not printed on receipts, and the order history and the logs show only its last four characters.

See the cards of an order

Open the order in **Orders**. Under the line that sold the card you see, for each card, its **code**, its **status**, its **balance** ("Balance 20.00 € of 25.00 €") and its **expiry date**. This comes from the copy kept on this computer, so it works offline; a card issued a moment ago appears after the next synchronisation.

A card is created when the order is **paid**. Before that the order shows no code and the code cannot be used. A card that has not started shows **Usable from {date}** and the status **Not usable yet**.

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Print a physical card

On the line of a **physical** card that is still active, click **Print card slip**. A one-page slip opens in the print window: the shop's name, the words "Gift card", the amount the card holds now, the code in large type, the expiry date, the expiry notice the shop wrote for this product and « Document non fiscal » ("Non-fiscal document" in English): the slip is no receipt. Print it, pack it with the order and ship the order as usual. Printing works offline. A virtual card has no slip.



Find a card

Open **Products** and choose the **Gift cards** tab. The list shows every card with its **Code**, **Balance**, **Expires**, **Status** and the **Order** that sold it. Type part of a code or an order number in the search

box, or filter by status. The **Overspent** filter lists the cards that till sales spent more than they held (see below). The list is kept on this computer and works offline.

At the till

To take a gift card as payment, choose the **Gift card** payment method in the sale, then type or scan the code.

- The till looks the code up in this computer's copy of the cards, so it **works offline**.
- A code the till does not know, or a card that is expired, cancelled or used up, is refused with a message that never says whether the code exists.
- A card that has not started says "This card can be used from {date}.", and a card whose customer has declared a withdrawal says "This card can't be used: a withdrawal is in progress." Nothing is taken from either.
- The card pays **at most its balance and at most what is still due**. You can add several cards to one sale, one row per card, never the same card twice. A card never gives change.
- The card's balance goes down on this register at once, so it cannot be spent twice here while the sale waits to be sent.
- The receipt prints the payment method **Gift card** only: no code and no remaining balance. *(Proposal, pending owner confirmation.)*

Balance while a sale waits. The balance this register shows for a card is the last balance received from the server, minus the sales of this register that have not been sent yet. After the sale is sent, the card can read a little lower than it really is until the next synchronisation; it corrects itself then. It normally reads lower, not higher, than the real balance. *(Proposal, pending owner confirmation.)*

Training mode. In training mode you can take a gift card to practise: the code is checked as usual, but nothing is taken from the card, and the sale is marked as a training sale. *(Proposal, pending owner confirmation.)*

Two registers offline. A card spent on two registers before they synchronise can be spent twice. When the sales reach the server, the balance stops at zero and the part the card could not cover is flagged as **overspent** in the list; the sale stands and the shop absorbs the difference. *(Proposal, pending owner confirmation.)*

Refunds and cancellations

- **A gift card that was sold** can be refunded only if it has **not been used at all**. Refunding the sale cancels the card. A card that has spent part of its value, or that has expired, is not refunded: ask an administrator. A card sale is refunded card by card: refunding one of two cards on a line cancels one card. *(Proposal, pending owner confirmation.)*

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- **Goods paid with a gift card:** the part the card paid goes, as the customer chooses, **Back onto the gift card** (added back to its balance, with the same expiry date) or **As store credit**; the part paid another way goes back that way. The refund dialog says where each amount goes before you confirm. If the card has expired or been cancelled since, there is no choice: its part goes to the customer as store credit, and the dialog says why ("The gift card has expired: refunded as store credit."). At the till, see Gift cards at the till.
- **A withdrawal of a gift card** (the customer declared it, within the 14 days): the card shows **Withdrawal in progress** and cannot be used until it is refunded. Refund it with the reason **Withdrawal (14 days)**: a card not used is refunded in full; a card started and partly used is refunded its **unused balance** (the dialog says so and lowers the amount); a card fully used cannot be withdrawn, and the dialog says "This card has been fully used: it can't be withdrawn." If the buyer did not tick the express request, a started card is refunded in full. The details are on the administrators' page, **Withdrawal and the freeze**.
- **At the till**, a line that sold a gift card is refunded or cancelled as a whole line only, and a sale that sold a card that has since been used or cancelled is not refunded or cancelled there: ask an administrator.
- Only administrators can **cancel** a card (decided by the owner).
- Only administrators can **reissue** a lost physical card. *(Proposal, pending owner confirmation.)*

previous: Orders

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Emails

Every email the shop sends on its own has a text that you can change: the order emails, the welcome emails, the password reset, the newsletter confirmation and the back-in-stock alert emails. You manage them from **Configure → Emails**, in English and in French separately. Administrators only.

The list of emails

The list on the left has one block per email, with an **English** and a **French** line under it. A line marked **Customized** has a text of your own; the others use the text that comes with ShopForge. The emails are:

Email	Sent
Order confirmation	When an in-store pickup order needs the customer to confirm it before it is held.
Order confirmed	When an order is created online or in the back office. For an order with nothing to ship (a gift card, a membership), it carries the invoice PDF.
Ready for pickup	When an order is ready to collect in store. For an order paid online, it carries the invoice PDF.
Order shipped	When an order ships, with its tracking number if one is set. The first shipment carries the invoice PDF.
Order cancelled	When an order is cancelled, by staff or automatically.
Payment being confirmed	When a PayPal payment has been pending for the configured delay: the order was received and the payment is still being confirmed.
Withdrawal acknowledgement	When a customer declares a withdrawal from their account.
Note sent to the customer	When staff send a note to the customer from an order.
Partial pickup: items ready	When staff tell the customer that some items of a pickup order are ready.

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Email	Sent
Refund	When an invoiced online order is refunded, online or at the till, with the credit note PDF attached. Not sent for a Discogs order.
Till invoice	When a customer asks for an invoice at the till, with the PDF attached, to the address typed at the till.
Till credit note	When a sale invoiced at the till is refunded, with the credit note PDF attached, to the same address.
Gift card for the recipient	To the person a virtual gift card was given to: the code, the amount, the expiry date and notice, and the buyer's message.
New customer account	When a customer creates their own account in the online shop, or when you create one at their request from Users or the point of sale.
Newsletter subscription confirmation	To confirm a newsletter subscription.
Password reset	When a customer asks for a password reset link.
Staff welcome code	When an employee or admin account is created, or when an admin sends a new code: the shop name and the code to type under "I have a code" on the back office sign-in, valid 7 days.
Staff password reset code	When an employee or admin asks for a code from "Forgot password?" on the back office sign-in: the code, valid 30 minutes.
Back in stock	Once to each customer waiting for a product, when it can be bought again. Its unsubscribe link ends that alert only.
Back in stock (pre-order)	In place of the one above when the product can be pre-ordered rather than bought from stock; it also gives the release date.
Alert: confirm your email	To a visitor who asks for an alert without being signed in. The alert starts only when they click its link, valid for 7 days.
Alert: limit reached	When an address has reached the maximum of 20 alerts, at most once a day, with a link to the page where one can be removed.

The two languages are separate texts: when you change one, change the other too.

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Edit an email

1. Click the language line of the email. Its name, its language and when it is sent appear on the right.
2. Change the **Subject** and the **Body**. The subject is plain text. The body is formatted text, written in the editor described below. The subject takes up to 300 characters and the body up to 10,000.
3. Click **Save**: "Email template saved." The button is greyed out while nothing has changed.

If you click another line with unsaved changes, you are asked "Discard your unsaved changes to this email?". The preview on the right shows the email as you type.

The body editor

The body is written in the same editor as the product descriptions. Its toolbar gives headings, **bold**, *italic*, bulleted and numbered lists and links. Two tabs switch between **Visual** (what you see is what you write) and **Source** (the text with its formatting marks, for example `**bold**`). A blank line starts a new paragraph, and a single line break stays a line break. Raw HTML is not understood: it is shown as typed.

Under the title, the placeholders are buttons: click one to insert it at the cursor, in the body (the subject takes them typed).

Images

An email can show an image, by its address only: there is no upload. Click **Insert an image**, type the **Image address (https://...)** and a **Description (alt text)**, then **Insert**. The address must start with `https://` and may be on any website; it cannot be a placeholder. The description is required: it is shown where the image does not load, and in the plain-text version of the email. Saving is refused, with a message under the editor, for an address that does not start with `https://` or an image without a description.

The editor reminds you of two limits. The image is loaded from its address when the customer opens the email, so the website that holds it can see when the email is opened. And many email programs block remote images, so do not rely on an image for anything important. PNG, JPEG and GIF display in email programs; WebP and AVIF often do not.

The preview

On the right, **Preview** shows the subject and the body as the customer will receive them, updated as you type. It uses made-up sample values (an order number, a name, a date, a tracking number, order lines) in the language of the line you are editing, never real customer

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data. A placeholder that is not in the list stays as typed in the preview, as in the email. The preview is the same rendering the shop uses to send the email.

Placeholders

Under the title, **Available placeholders:** lists the words you can put between double braces in the subject and the body; each is replaced when the email is sent. A placeholder that is not in the list is left as you typed it, so a typo shows in the email the customer receives. A value always arrives as plain text: a name or a note that contains `**` or `<b>` is not formatted.

- `{{orderNumber}}` is the order number, in all the order emails.
- `{{orderDetails}}` is the order as the shop's cart shows it, line by line. It is in the order emails only, and only if you put it in the text: a text without it shows no lines. When the order has margin-scheme goods, the mention of that scheme is part of it.
- Names ending in `Line` are a whole line, left out when there is nothing to say (no tracking number yet, no reason given, no message from the buyer).

Some emails need their placeholders to say anything at all:

- **Withdrawal acknowledgement**: place `{{withdrawalLines}}` (the lines declared), `{{refundMethod}}` and `{{declaredAt}}` in the text. Nothing is added to it, and without them the email does not tell the customer what was declared.
- **Partial pickup: items ready**: place `{{readyLines}}` (ready to collect now), `{{collectedLines}}` (already collected) and `{{remainingLines}}` (still being prepared) where each should appear. Each is a list with its own heading, left out when it is empty.
- **Note sent to the customer**: write `{{note}}` where the note goes. If it is left out, the note is added at the end.
- **Order confirmed**, **Ready for pickup**, **Order shipped** and **Refund**: `{{invoiceLine}}` says that the invoice or credit note is attached, or, when its PDF was not ready within an hour, that it is in the customer's account. It is empty when the email carries no document: an online order has an invoice only when the law asks for one or someone asks for it (see Automatic, or on request), and a Discogs order's invoice goes in the parcel. If you leave it out, it is added at the end. The PDF is attached whatever the text says.
- **Order confirmed**: `{{preorderLine}}` is one sentence for an order that includes a pre-order, pickup or delivery, and mixed with in-stock items: "Your order includes a pre-order. It will be prepared once everything is in stock, expected on {date}." The date is the latest release date of the pre-order items, in the shop's date format; with no release date the sentence ends at "in stock." For any other order the line is left out. The default text has it under the order details; a text you edited earlier shows it only if you add it.

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- **Refund**: `{{refundAmount}}` is the amount refunded, and `{{invoiceNumber}}` the credit note's number. `{{giftCardExpiredLine}}` explains why, when part of the refund went back as store credit because the gift card the customer paid with had expired: "We're sorry: the gift card you paid this order with has expired. Refunding to it would lose the amount, so we're refunding it as store credit instead." It is in the shop's email language and empty for any other refund, including a cancelled card. If you leave it out of a template you edited, nothing is added: the customer then finds the same sentence on the order page of their account.
- **Till invoice** and **Till credit note**: `{{invoiceNumber}}` is the number of the document, and `{{orderNumber}}` the sale's receipt number.
- **Gift card for the recipient**: keep `{{code}}` in the text; without it the card cannot be used.
- **Back in stock** and **Back in stock (pre-order)**: `{{productName}}`, `{{productLink}}`, `{{shopName}}` and `{{unsubscribeLink}}`; the pre-order one also has `{{releaseDate}}`. Keep the product link and the unsubscribe link in the text.
- **Alert: confirm your email**: `{{productName}}`, `{{confirmLink}}` and `{{shopName}}`. The text **must contain** `{{confirmLink}}`: without it the alert could never start, so **Save** stays greyed out and the editor says "The body must contain {{confirmLink}}." if you try.
- **Alert: limit reached**: `{{shopName}}` and `{{alertsLink}}`.
- **Order confirmation** and **Newsletter subscription confirmation** carry a link (`{{confirmUrl}}`) and the date it stops working (`{{expiresAt}}`); **Password reset** carries `{{resetUrl}}` and `{{expiresAt}}`; the two staff mails, **Staff welcome code** and **Staff password reset code**, carry `{{code}}` and `{{expiresAt}}` (the welcome one also `{{shopName}}`) and no link.

Reset an email to its default

Click **Reset to default**. The dialog says "Your customized subject and body will be replaced with the built-in default. This cannot be undone." and **Reset** confirms. The button is greyed out on a line that is not customized. Resetting one language does not touch the other.

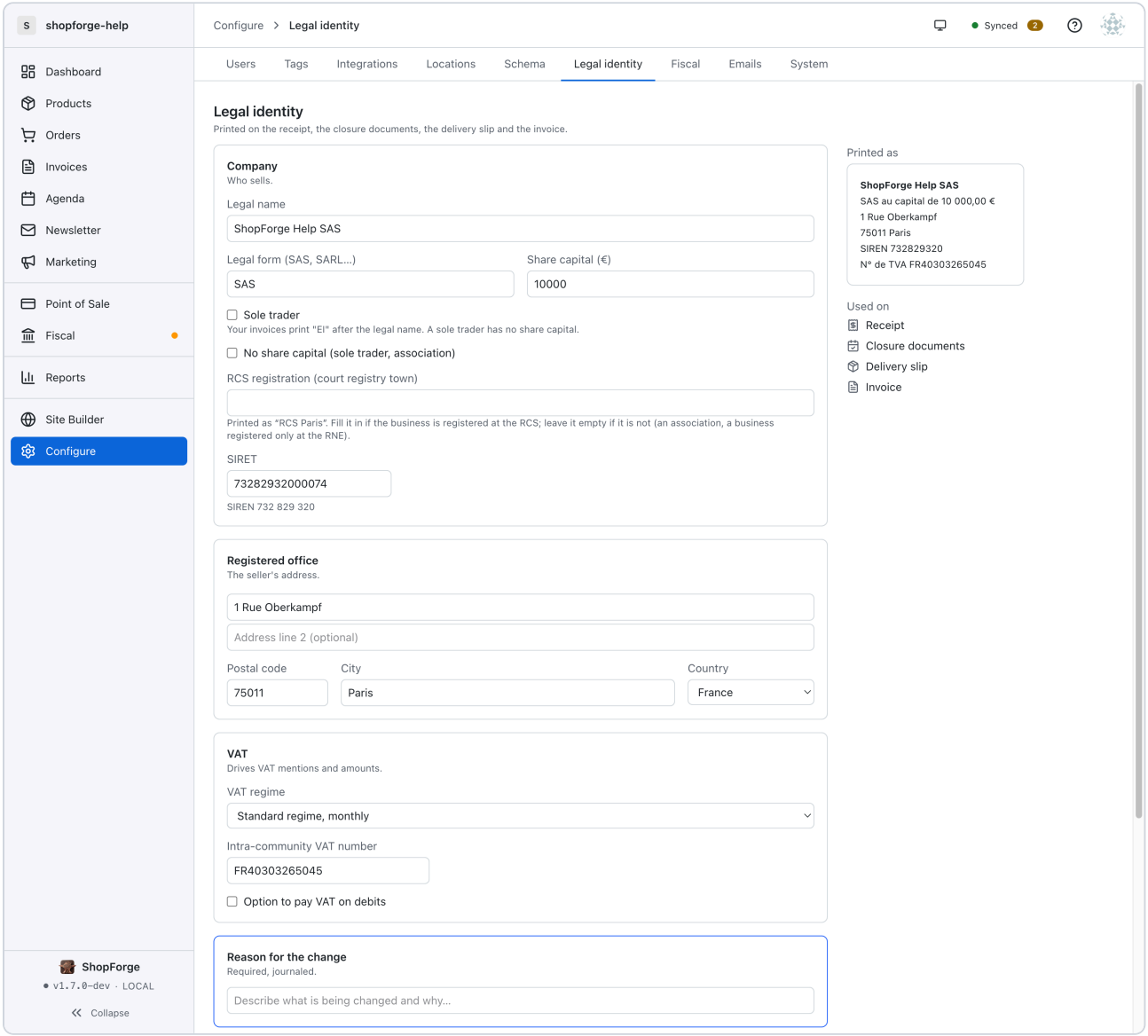
Sending the emails

The emails leave through the shop's own mail server: set it in **Configure → Integrations**, under **Email (SMTP)**. See Integrations.

Legal identity

Your shop's legal identity is typed **once**, here, in **Configure → Legal identity** (administrators only); the **Legal identity** link under the tab list of **Configure → Fiscal** opens it too. The receipt, the closure documents, the delivery slip and the invoice all read it from this page, so they print the same SIRET and the same VAT number.

The page is a set of boxes on the left, **Company**, **Registered office**, **VAT** and **Reason for the change**, and a panel on the right. **Printed as** shows the seller block of the invoice built from what you have typed, as the invoice prints it (in French, whatever the language of the application), and **Used on** lists the documents that read this page: the receipt, the closure documents, the delivery slip and the invoice. A bar at the bottom counts the unsaved changes, with **Discard** and **Save**.



What it is for

- The **receipt** prints the SIRET and the VAT number, next to the shop's name and address as before.
- The **closure documents** and the **delivery slip** print the SIRET (and the closures the VAT number).
- The **invoice** prints everything on this page: the legal name, the legal form, the share capital, the RCS town, the registered office, the SIREN (the first 9 digits of the SIRET), the VAT regime and number.

No document changes its layout. The Fiscal settings and the invoicing settings (early-payment terms, late-payment penalty, layout) no longer ask for these details: each shows a line, "The shop's legal identity is set in Legal identity.", that links here.

The fields

- **Legal name**, **Legal form (SAS, SARL…)** and **Share capital (€)**. A company (SARL, EURL, SAS, SASU, SA, SNC…) must print its share capital on its invoices, so the capital is required and must be above 0. A sole trader or an association has none: tick **No share capital (sole trader, association)**, under the two fields. The capital field is then hidden, nothing is saved for it, and the invoice prints the legal form without a capital. The box is unticked for a new identity, and ticked again once an identity is saved without capital. Typing EI or Association as the legal form does not tick it for you.
- **Sole trader**: tick it if the shop is a sole trader (entrepreneur individuel). The hint under it reads "Your invoices print "EI" after the legal name. A sole trader has no share capital." The invoice and the credit note then print the legal name followed by « EI » (« Marie Dupont EI ») as the name of the seller block, and the same name is the seller's name in the invoice's XML file; the **Printed as** panel shows it as you type. The receipt, the closure documents and the delivery slip do not carry it. A sole trader has no share capital: ticking **Sole trader** ticks **No share capital** for you and locks it, and the capital field is hidden; unticked, the box is free again and the name is printed alone. If the legal name you typed already says it (« Marie Dupont EI », « Marie Dupont, entrepreneur individuel »), « EI » is not added a second time. Typing EI as the legal form does not do this: the box is the choice.

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- **RCS registration (court registry town)**: optional. If the business is registered at the RCS (the commerce register), type the town of the court registry it is registered at, for example `Paris`: the invoice and the credit note then print « RCS Paris » on the first line of the seller block, after the legal form and the capital (« SARL au capital de 8 000,00 €, RCS Paris »). The law (art. R123-237 of the Code de commerce) requires this mention on the invoices of a business registered at the RCS: a company (SARL, EURL, SAS, SASU, SA, SNC…) and a sole trader who buys goods to resell them, micro-entrepreneurs included, must fill it in. Leave it empty if the business is not registered at the RCS, for example an association or a business registered only at the national business register (RNE): nothing is printed and nothing is refused. The town is up to 100 characters; the SIREN is already printed on its own line.
- **Registered office**: **Address** (a first line, and a second one if you need it), **Postal code**, **City** and **Country**, a choice with France only (saved as `FR`).
- **SIRET**: 14 digits, checked when you save. There is no separate SIREN field: the invoice prints the SIREN from the first 9 digits of the SIRET, so the two always agree. Spaces are ignored. Under the field, a hint shows the SIREN of what you typed ("SIREN 123 456 789") once there are 9 digits.
- **VAT regime**: Standard regime monthly, Standard regime quarterly, or "Simplified (CA12): until 31 December 2026, then quarterly" (the simplified regime ends on 1 January 2027: from then on, the declarations table shows the quarterly CA3). The VAT exemption (franchise en base) is not offered.
- **Intra-community VAT number**: two letters then 2 to 12 letters or digits, for example `FR12345678901`. It is always required.
- **Option to pay VAT on debits**: tick it if the shop has opted to pay VAT on debits.

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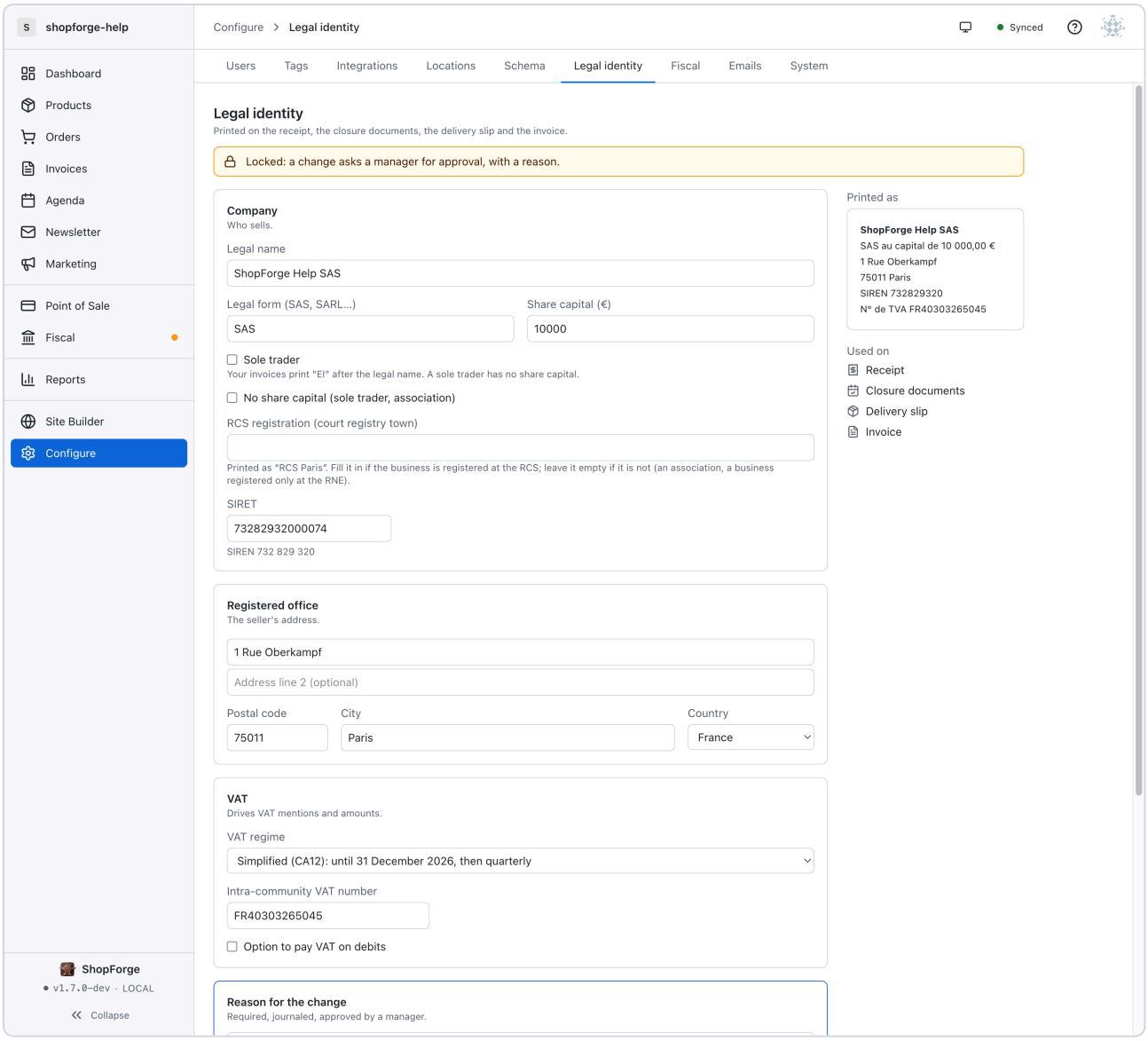

Change it

1. Change the fields. The **Printed as** panel follows what you type, and the bar at the bottom counts the unsaved changes. **Discard** puts back the values that were saved, and empties the reason.
2. Fill **Reason for the change** with what you change and why. It is required on **every** save, from the first one, and it is kept in the journal with the change.
3. Click **Save**. The page confirms "Legal identity saved."

A field that is empty or invalid is named under its input, and nothing is saved. With the box unticked and no capital above 0, the message under the field reads "Enter the share capital, above 0, or turn on "No share capital"." Everything else in the fiscal settings stays as it is.

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After the fiscal settings are locked

The legal identity is kept with the fiscal settings, so their controls apply to the whole page. Until a register opens the first cash session of the country, no approval is asked: you only give the reason, and the hint under it reads "Required, journaled." Once the settings are **locked**, a row at the top of the page says "Locked: a change asks a manager for approval, with a reason.", the hint reads "Required, journaled, approved by a manager.", and **Save** asks a manager for approval with your reason. The change is then recorded as a signed entry in the JET journal, like any fiscal settings change (see Manager approval).

Changing the legal identity needs this computer's register to be registered: open the POS page first if you are told the change is signed by this computer's register.

Related

- Fiscal settings — currency, locale, VAT rates, signing keys and the lock.

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