

Creating and configuring your company

Company setup and configuration

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Create your company record, add its details and logo, and understand the defaults it sets.

Beginner · About 15 minutes · Version 1.0 · Updated 17 November 2026

Overview

The **Company** record is the foundation of your system. It holds your business name, currency, country and tax details, and it decides which chart of accounts and default accounts your transactions use. Most customers have one company, but you can add more if you run separate legal entities.

Prerequisites

- The **System Manager** role, or the permission to edit Company.
- Your official business name, KRA PIN and physical address to hand.

Steps

1. Type **Company** in the search bar and open the list.
2. Open your existing company, or click **Add Company** for another one.
3. Fill in the **Details**: - **Company Name**: your legal name as it should appear on invoices. - **Abbreviation**: a short code, such as `MHB`. It is added to the end of account and warehouse names, for example `Stores - MHB`. Choose it carefully, because it is hard to change later. - **Default Currency**: `KES` for Kenya shillings. - **Country**: Kenya. - **Tax ID**: your KRA PIN.
4. Upload your **Company Logo** in the Company Info section.
5. Check the **Chart of Accounts** setting. Leave the standard chart for a new company, and see The chart of accounts to adapt it.
6. Click **Save**.
7. Add your address: open **Address** from the Connections tab, click **Add Address**, link it to the company, tick **Preferred Billing Address**, and save.

Practical example

Mwangaza Hardware & Building Supplies Ltd sets the abbreviation `MHB`, the currency `KES`, the country Kenya and its KRA PIN. Every new invoice then shows the right name, PIN and address without anyone typing them.

Important notes

- The **Default Currency** applies to all new transactions. Change it only before your first transaction.
- The company's **Default Accounts** section (cash, bank, receivables, payables and income accounts) fills automatically from the chart. Review it before you start posting.
- To use more than one company, switch between them using the **Company** field on each document.

Common mistakes

- Using a long abbreviation. Account names get long and hard to read.
- Entering the trading name instead of the legal name, so invoices show the wrong name.

Troubleshooting

If you cannot change the default currency, transactions already exist. Ask support before attempting to change it.

Next steps

Read Currency, fiscal year and accounting periods.

Related documentation

- Currency, fiscal year and accounting periods
- The chart of accounts
- Warehouses and business locations