Settings

Documentation · https://viaspaces.com/Documentation/settings/

In this help doc: how to configure an account — the company profile, banking, tax, users, document rules, approvals, notifications, formatting, and billing.

Settings apply to one account. Values set here appear on documents and govern account-wide behavior. Open Settings from the sidebar; it expands into nine areas grouped as **basic** (My Account), **banking** (Bank Details), and **advanced** (all others).

My Account

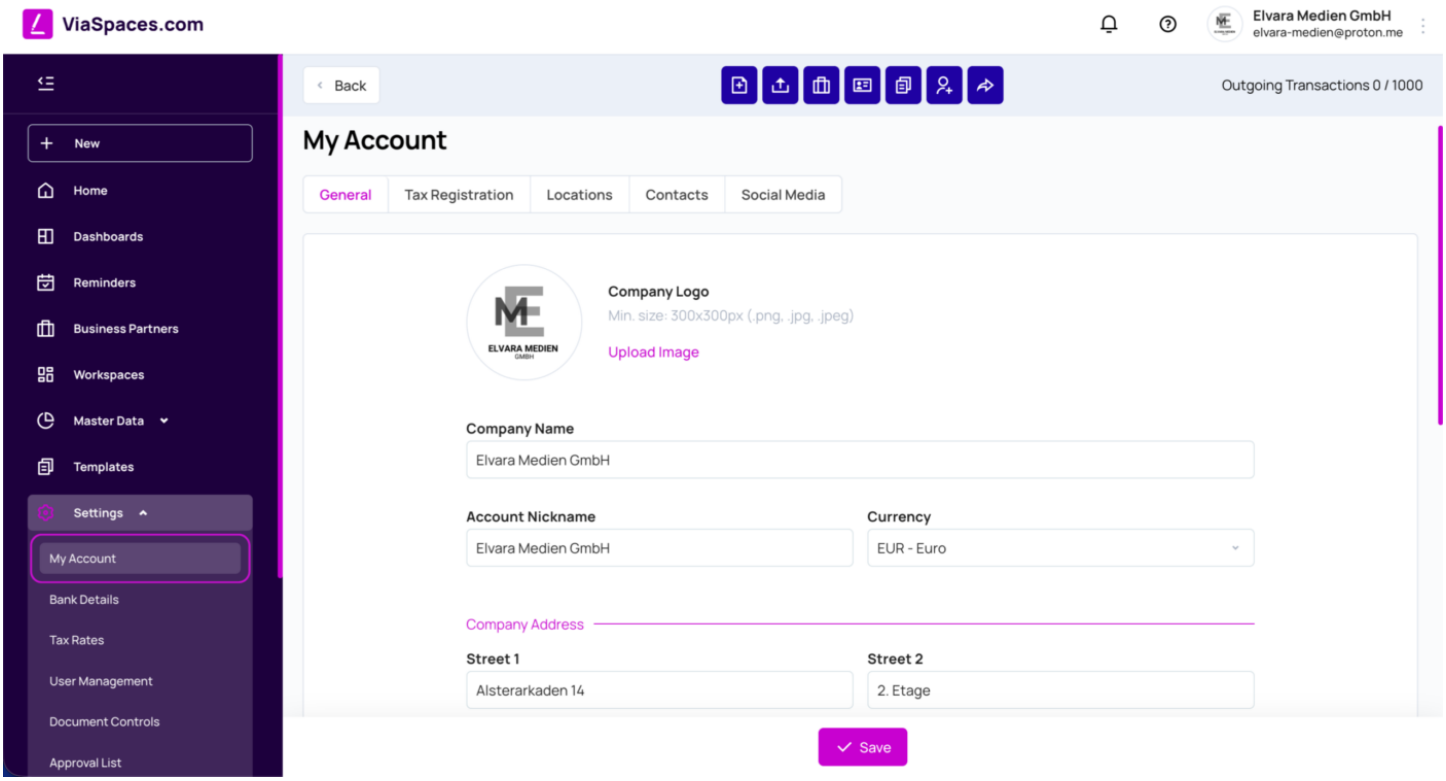
My Account is the company profile — the basic identity that appears on documents. It is organized into tabs: **General**, **Tax Registration**, **Locations**, **Contacts**, and **Social Media**.

The **General** tab holds:

Field	Value
Company logo	Image on documents. Minimum 300 × 300 px; .png, .jpg, .jpeg.
Company Name	Registered company name.
Account Nickname	Label shown in the account list.
Default Currency	Currency used across the account and for Dashboard totals.
Address	Company address.
Company Registration No.	Business registration number.
Tax Registration / ID	Tax identification number.

Field	Value
Tax Jurisdiction Code	Country code for tax (for example, DE).
Show Welcome Screen	Shows or hides the welcome screen.

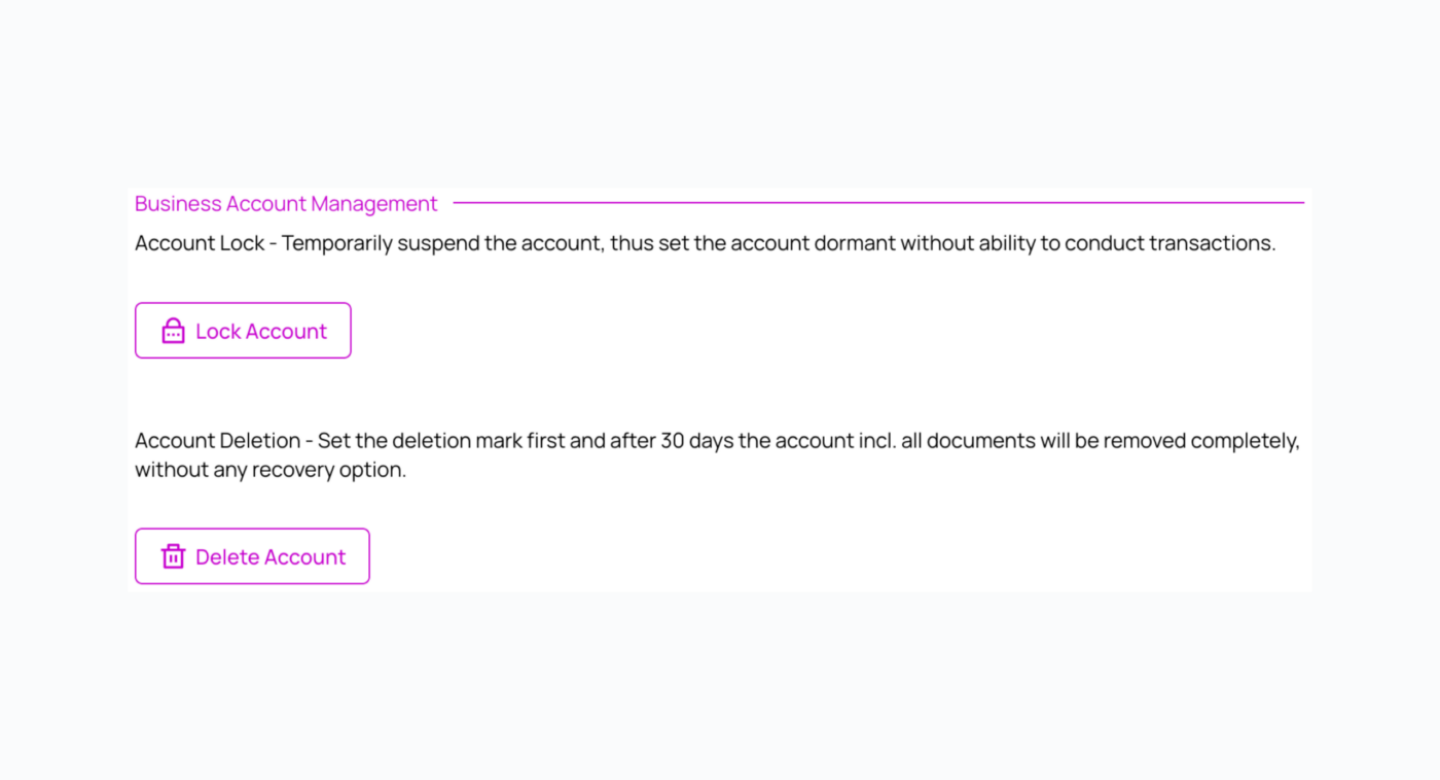
Note: Lock and delete actions are at the bottom of the General tab, under Business Account Management. See *Account lock and deletion* below.



Account lock and deletion

Business Account Management holds two account-level actions.

Action	Effect
Lock Account	Temporarily suspends the account and sets it dormant, with no ability to conduct transactions. An Administrator unlocks it.
Delete Account	Sets a deletion mark. After 30 days the account and all documents are removed with no recovery option.



The remaining tabs:

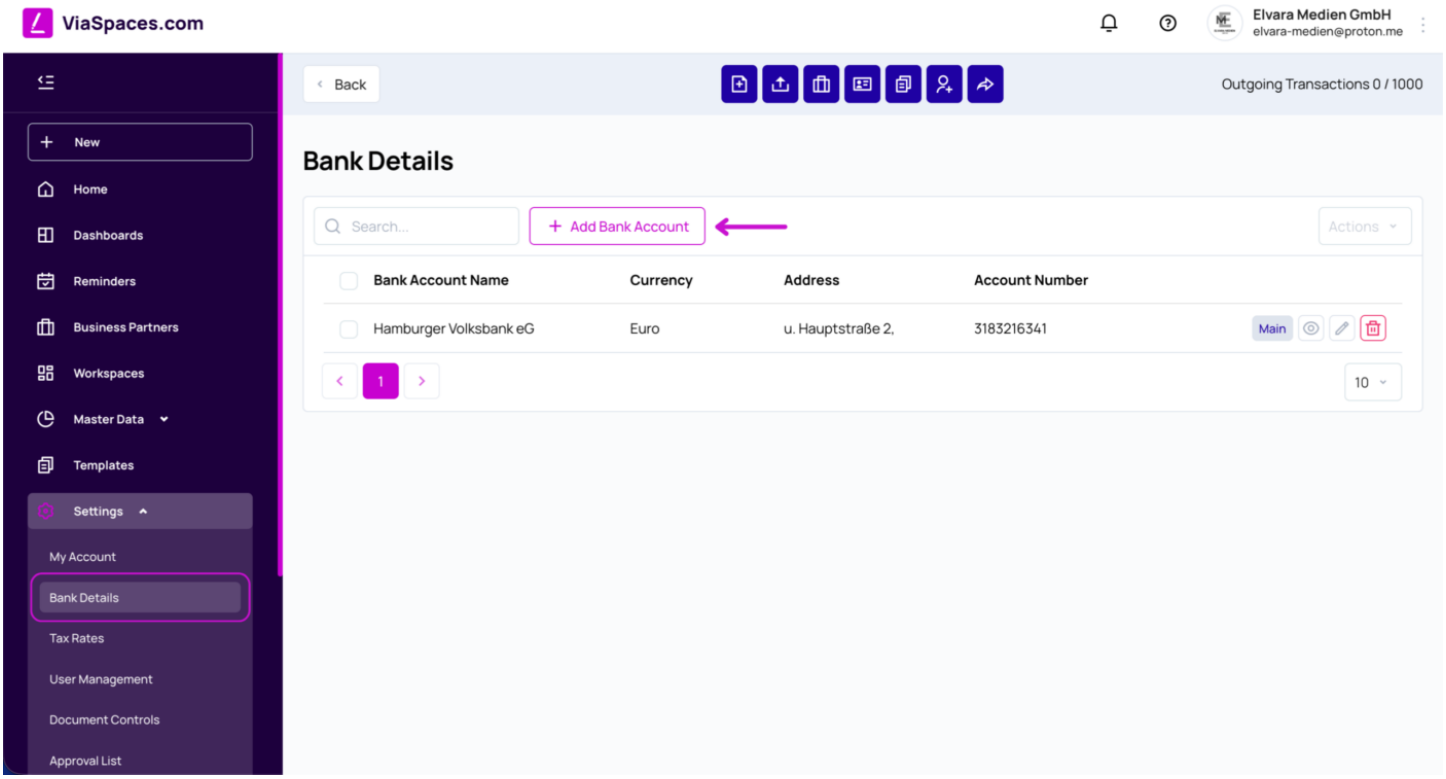
Tab	Content
Tax Registration	Tax registrations by country and type.
Locations	Additional addresses: Location Name, Street, City, ZIP Code, Country.
Contacts	Contact people with Full Name, Title, E-mail, Phone Number, and a Primary flag.
Social Media	Website and social profile links.

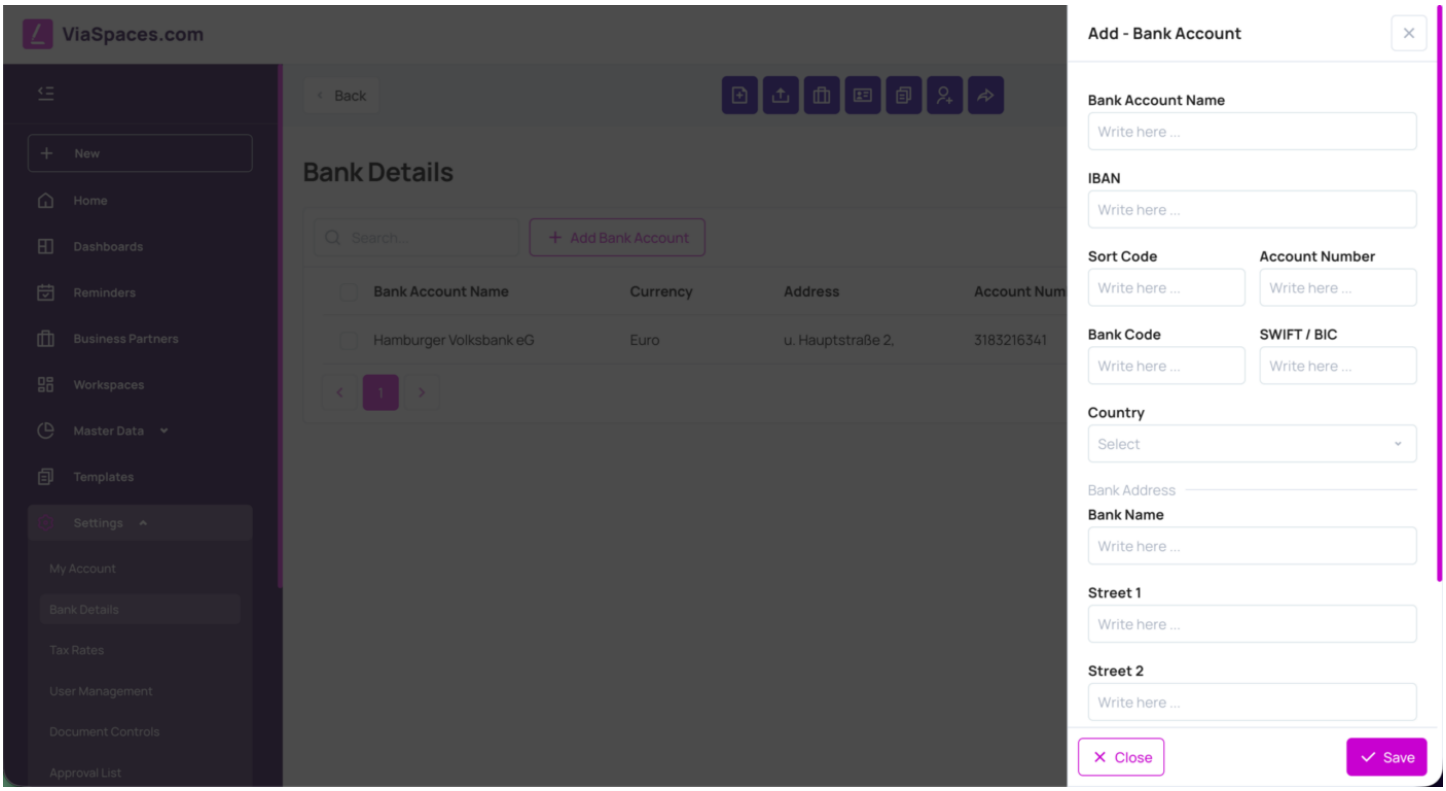
Bank Details

Bank Details holds the bank accounts shown on documents. Each entry records:

Field	Value
Bank Account Name	Name of the account.
Currency	Currency of the account.
Account Number	Account number.
Address	Bank address.
Main	Marks the default account used on documents.

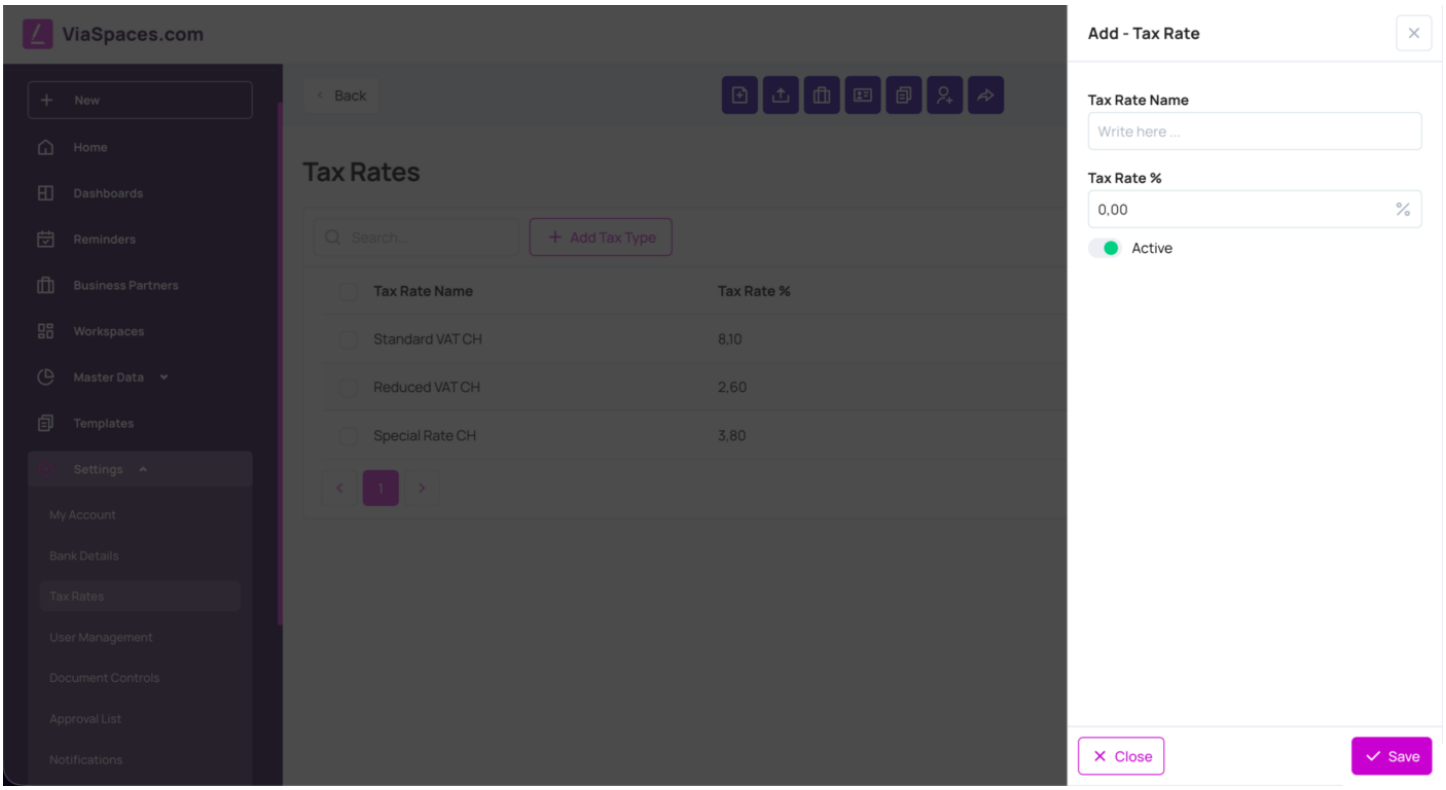
Add an account with **Add New**.


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New
Home
Dashboards
Reminders
Business Partners
Workspaces
Master Data
Templates
Settings
My Account
Bank Details
Tax Rates
User Management
Document Controls
Approval List
Back
Outgoing Transactions 0 / 1000
Bank Details
Search...
+ Add Bank Account
Actions
Bank Account Name
Currency
Address
Account Number
Hamburger Volksbank eG
Euro
u. Hauptstraße 2,
3183216341
Main
1
10


ViaSpaces.com
Back
New
Home
Dashboards
Reminders
Business Partners
Workspaces
Master Data
Templates
Settings
My Account
Bank Details
Tax Rates
User Management
Document Controls
Approval List
Bank Details
Search...
+ Add Bank Account
Bank Account Name
Currency
Address
Account Num
Hamburger Volksbank eG
Euro
u. Hauptstraße 2,
3183216341
1
Add - Bank Account
Bank Account Name
Write here ...
IBAN
Write here ...
Sort Code
Write here ...
Account Number
Write here ...
Bank Code
Write here ...
SWIFT / BIC
Write here ...
Country
Select
Bank Address
Bank Name
Write here ...
Street 1
Write here ...
Street 2
Write here ...
Close
Save

Tax Rates

Tax Rates defines the tax percentages used in document calculations. Each rate has a **Tax Rate Name**, a **Tax Rate** percentage, and a status of **Active** or **Disabled**. A disabled rate is retained but not offered on new documents. Add a rate with **Add New**.



User Management

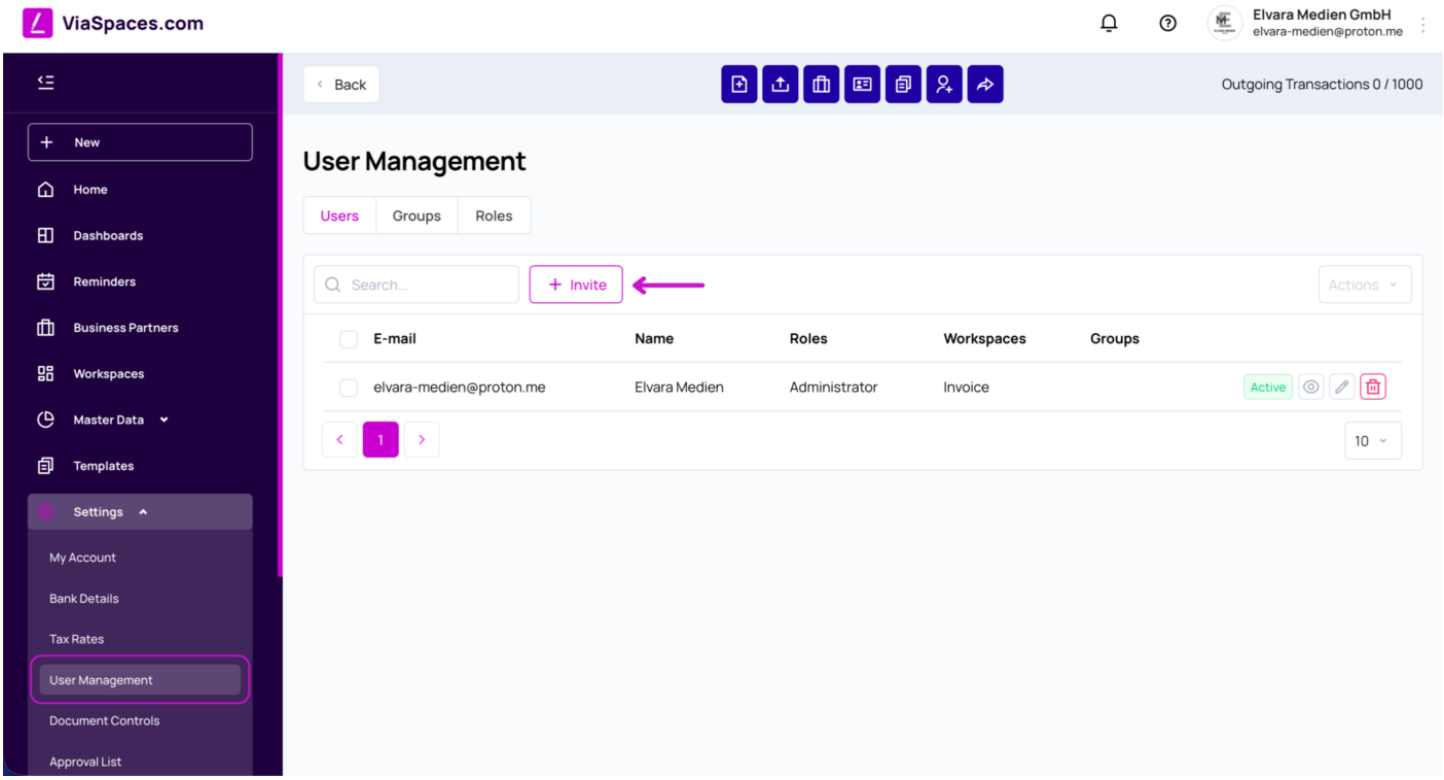
User Management controls who can enter the account and what they can do. It has three tabs: **Users** , **Groups**, and **Roles**.

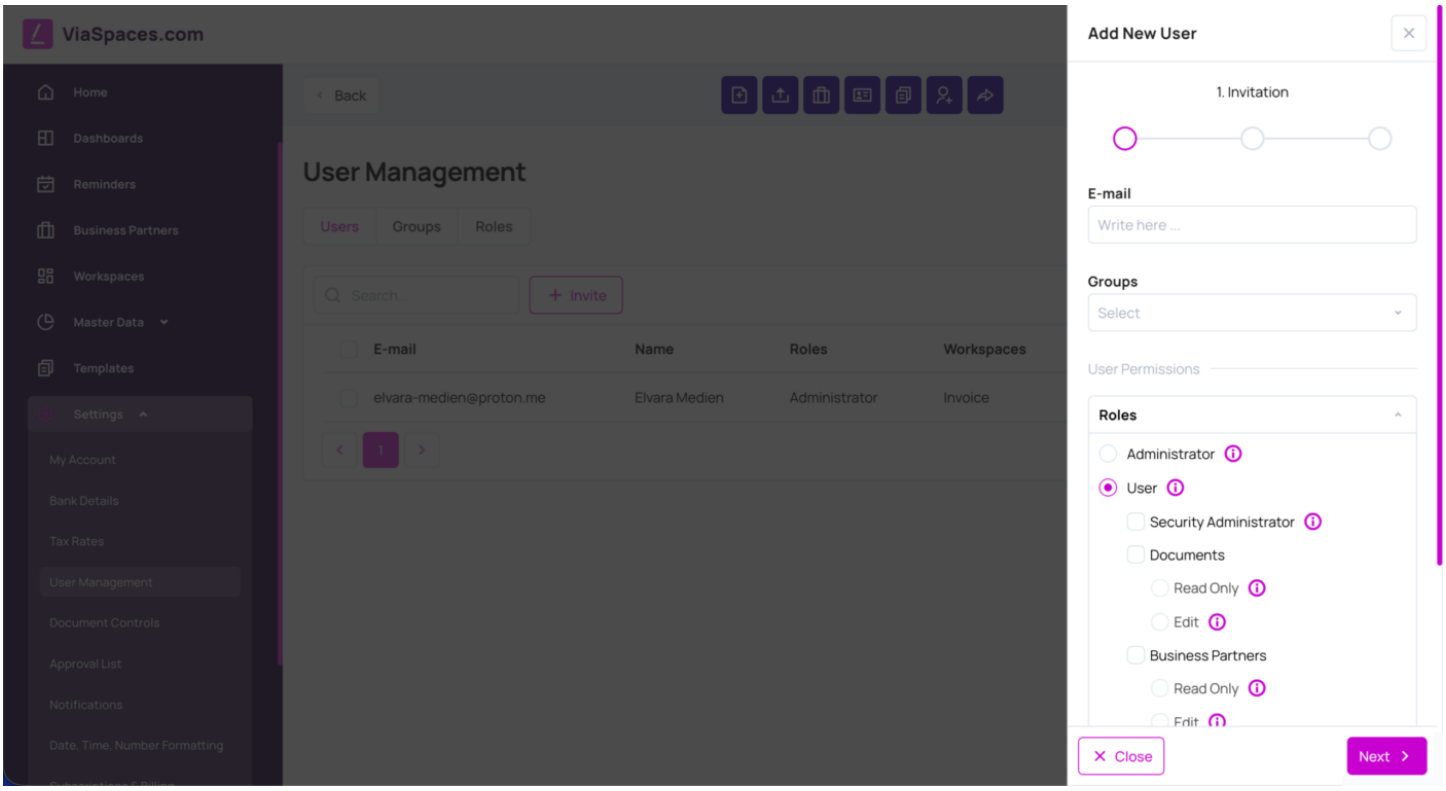
Users

The Users tab lists users with E-mail, Name, Roles, Workspaces, Groups, and status (Active or Inactive). Each row can be viewed, edited, or deleted.

Add a user with **Invite**, a three-step flow:

1. **Invitation** — enter the **E-mail**, select **Groups**, and set **User Permissions** (Roles).
2. Complete the remaining steps.
3. Send the invitation. The user appears with an invited status until accepted.



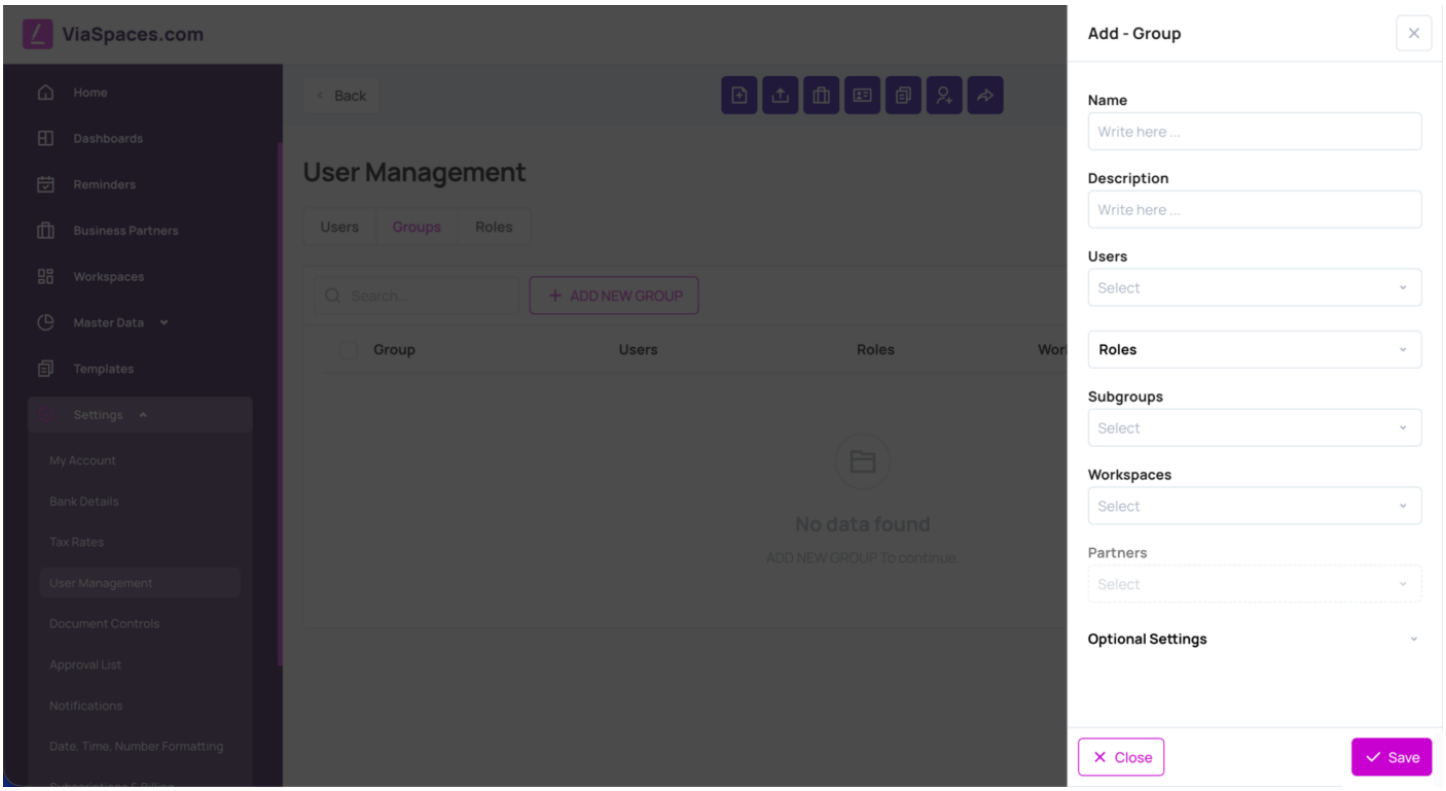


Groups

The Groups tab lists user groups with Group name, Users count, Roles, and Workspaces. Add a group with **Add New Group**.

Field	Value
Name	Group name.
Description	Group description.
Users	Members of the group.
Roles	Roles granted to the group.
Subgroups	Groups nested inside this group.
Workspaces	Workspaces assigned to the group.
Partners	Partners assigned to the group.

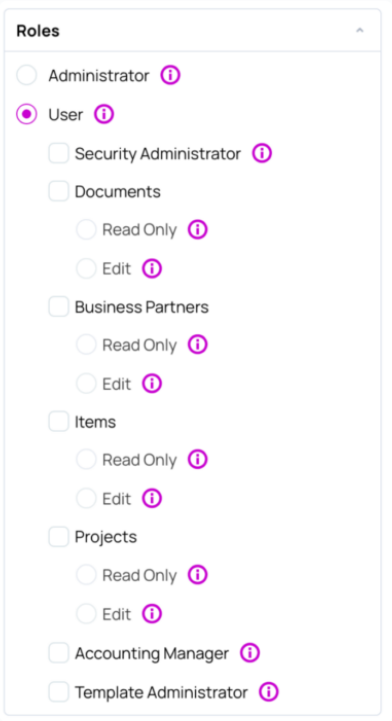
Field	Value
Optional Settings	Custom permission filters — Permission's Filter Name, Permission Object, and a Predicate for field-level access.



Roles

The Roles tab lists the account's roles with the number of users and groups holding each. Roles are assigned to users and groups here.

Note: For the meaning of each role, see the Users and Access Rights page.



Document Controls

Document Controls defines document rules across the account. It has two tabs: **Document Numbering** and **Document Subtypes**.

Document Numbering

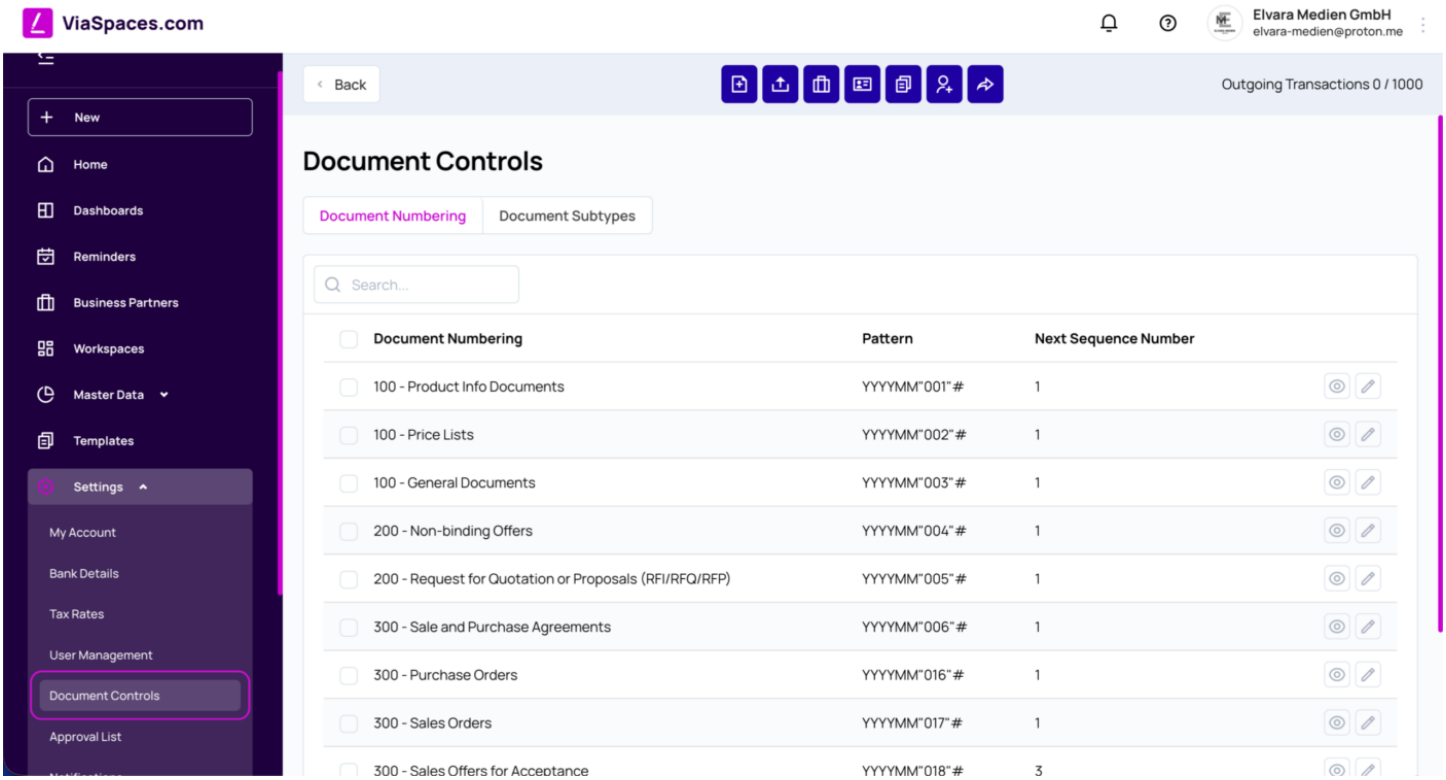
Document Numbering sets the number format for each document category. Categories are predefined by purpose (for example, 100 - Product Info Documents, 300 - Purchase Orders, 500 - Billing and Invoicing). Each row shows the **Pattern** and the **Next Sequence Number**.

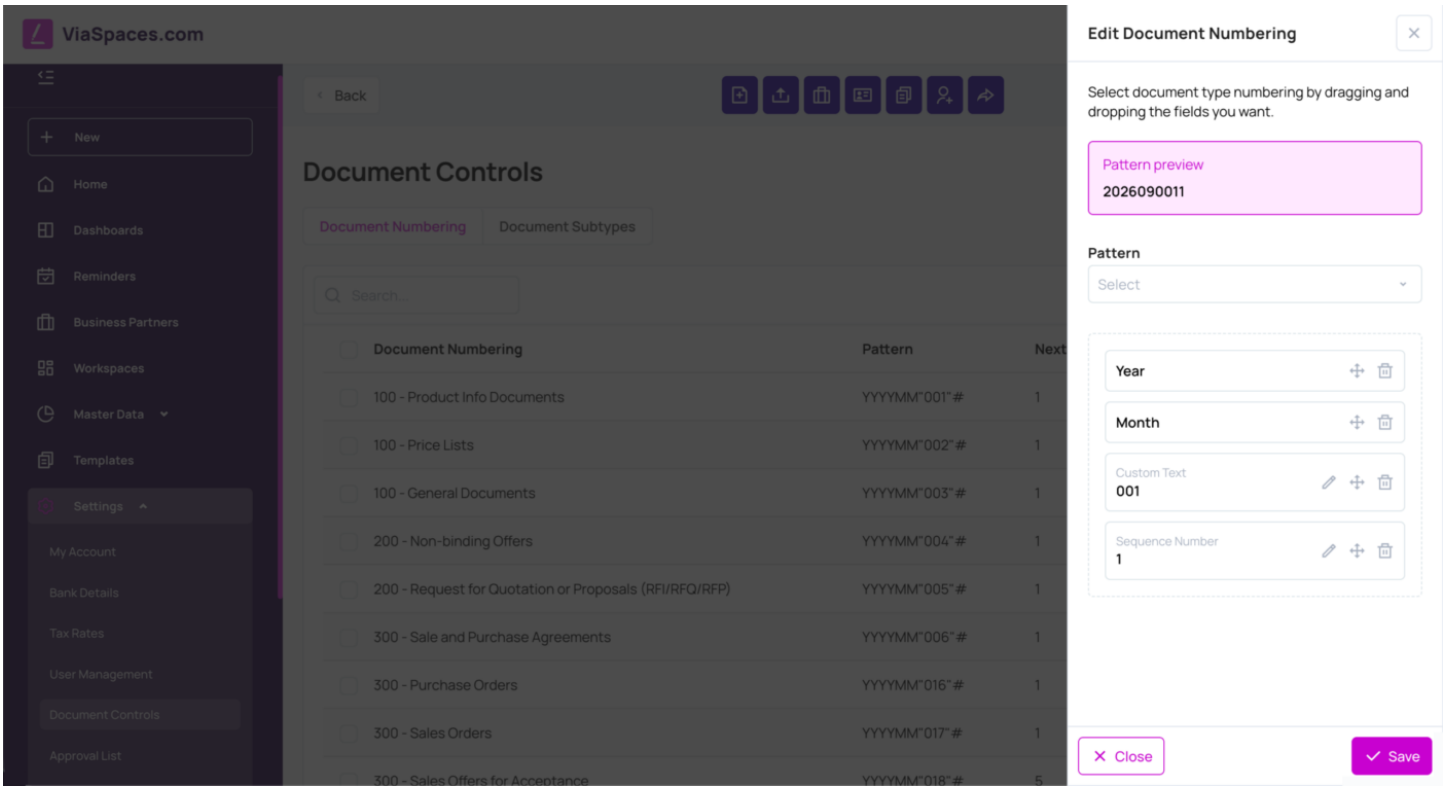
Edit a pattern by dragging and dropping fields:

Field	Purpose

Year	Inserts the year.
Month	Inserts the month.
Custom Text	Inserts fixed text.
Sequence Number	Inserts the incrementing number.

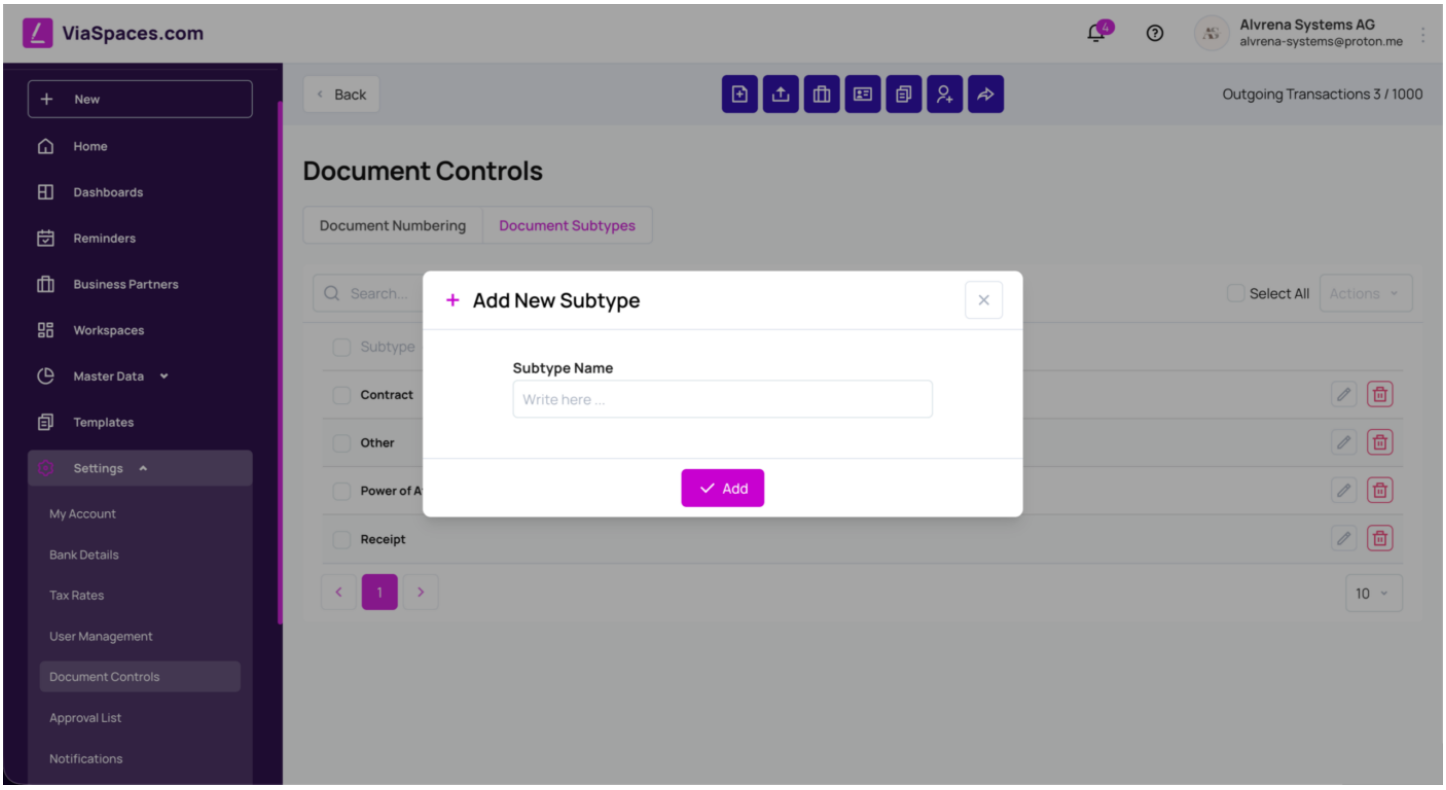
A **Pattern preview** shows the resulting number as fields are arranged.





Document Subtypes

Document Subtypes defines subtypes for uploaded documents (for example, Other, Invoice). Add a subtype with **Add new**.



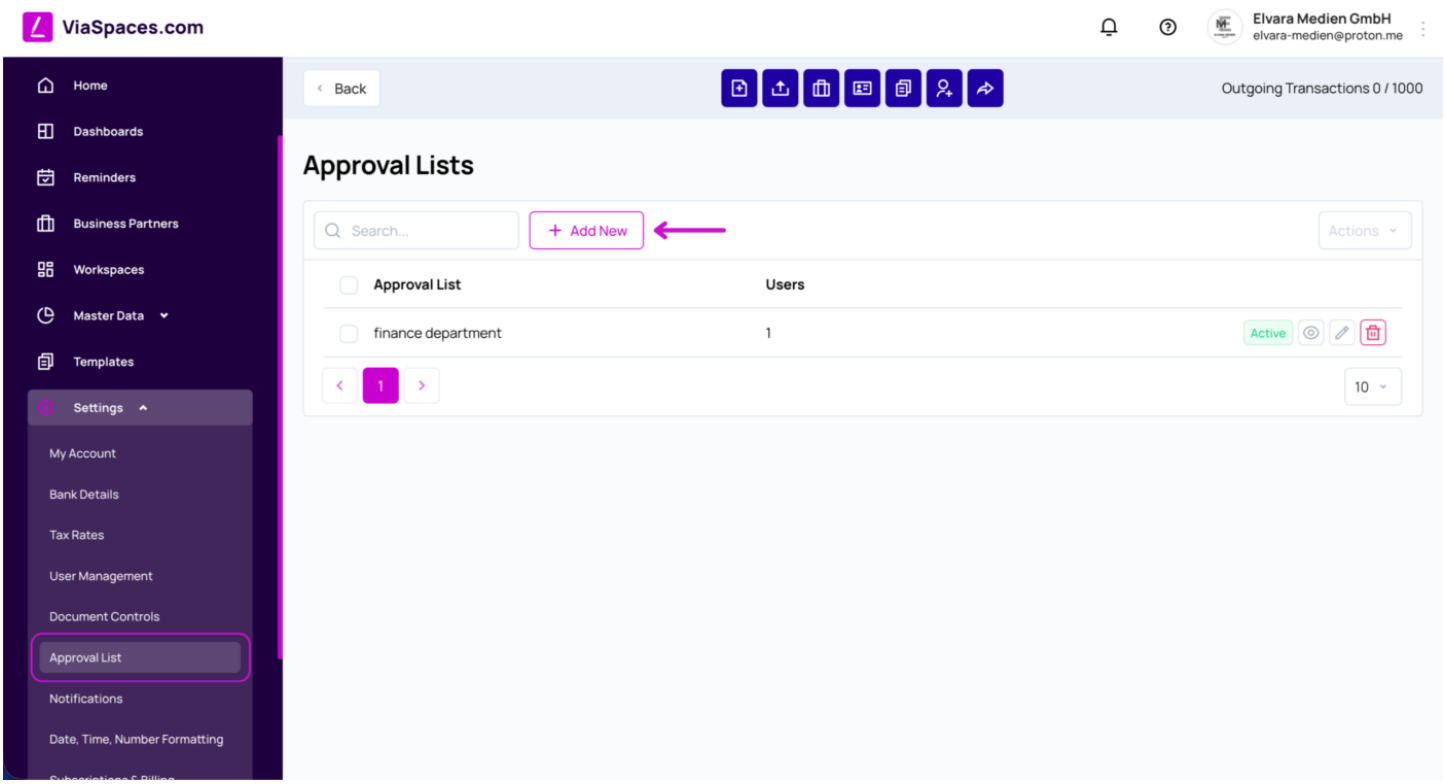
Approval List

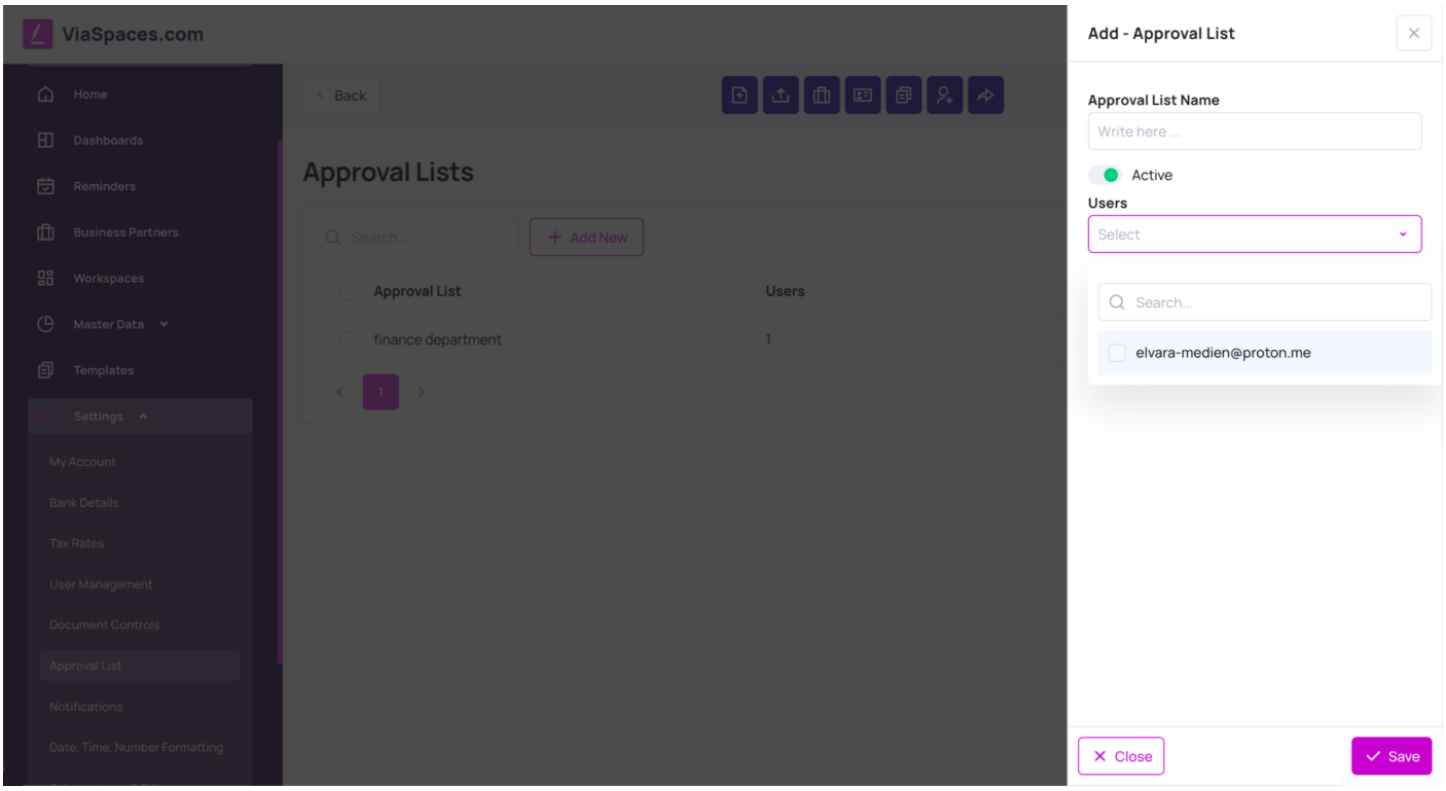
An Approval List is a reusable, named group of approvers applied to documents. Each list has an **Approval List Name**, a **Users** count, and a status of **Active** or **Inactive**. Inactive lists are not offered when approvers are set on a document.

Create or edit a list:

1. Click **Add New** or edit an existing list.
2. Enter the **Approval List Name**.
3. Set the **Active** toggle.
4. Select **Users** for the list.
5. Save.

Note: Applying an approval list to a document is done when sending. See the Sending and Receiving Documents page.





Notifications

Notifications control which document events send an alert and how. It has two tabs: **General** and **External Gateway**.

Each event has two controls:

Control	Options	Set by
Account Settings	Mandatory, Enabled, Disabled	Administrator
User Settings	Email & App, App	User

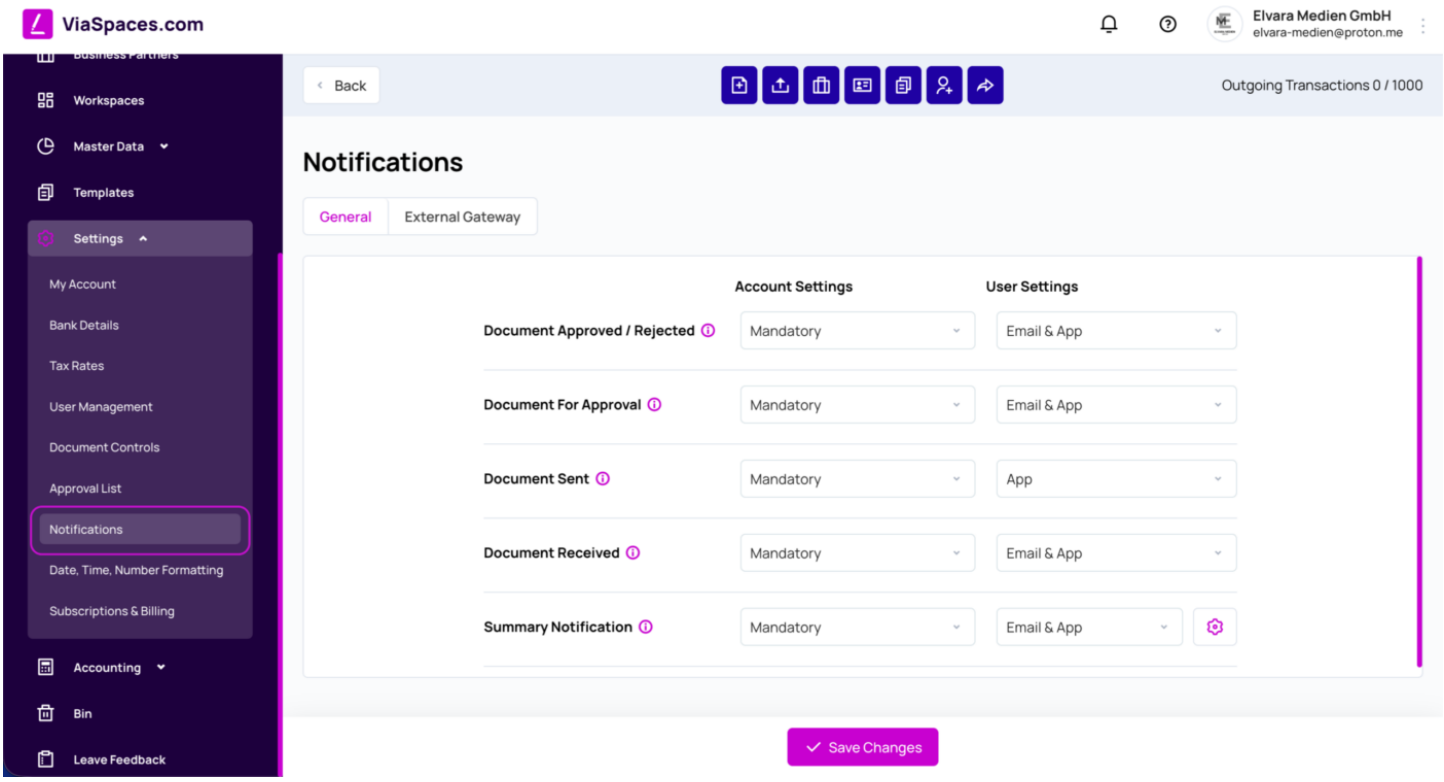
Account Settings and User Settings work together:

Account Settings	Result
Mandatory	The notification is always on. Users cannot turn it off.
Enabled	The notification is on. Each user chooses the channel in User Settings.
Disabled	The notification is off for everyone.

Events on the General tab: **Document Approved / Rejected**, **Document For Approval**, **Document Sent**, **Document Received**, and **Summary Notification**. Summary Notification has a frequency setting of Daily, Weekly, or Monthly.

Save with **Save Changes**.

Note: Delivery follows each user's own settings within the limits set by the Administrator.



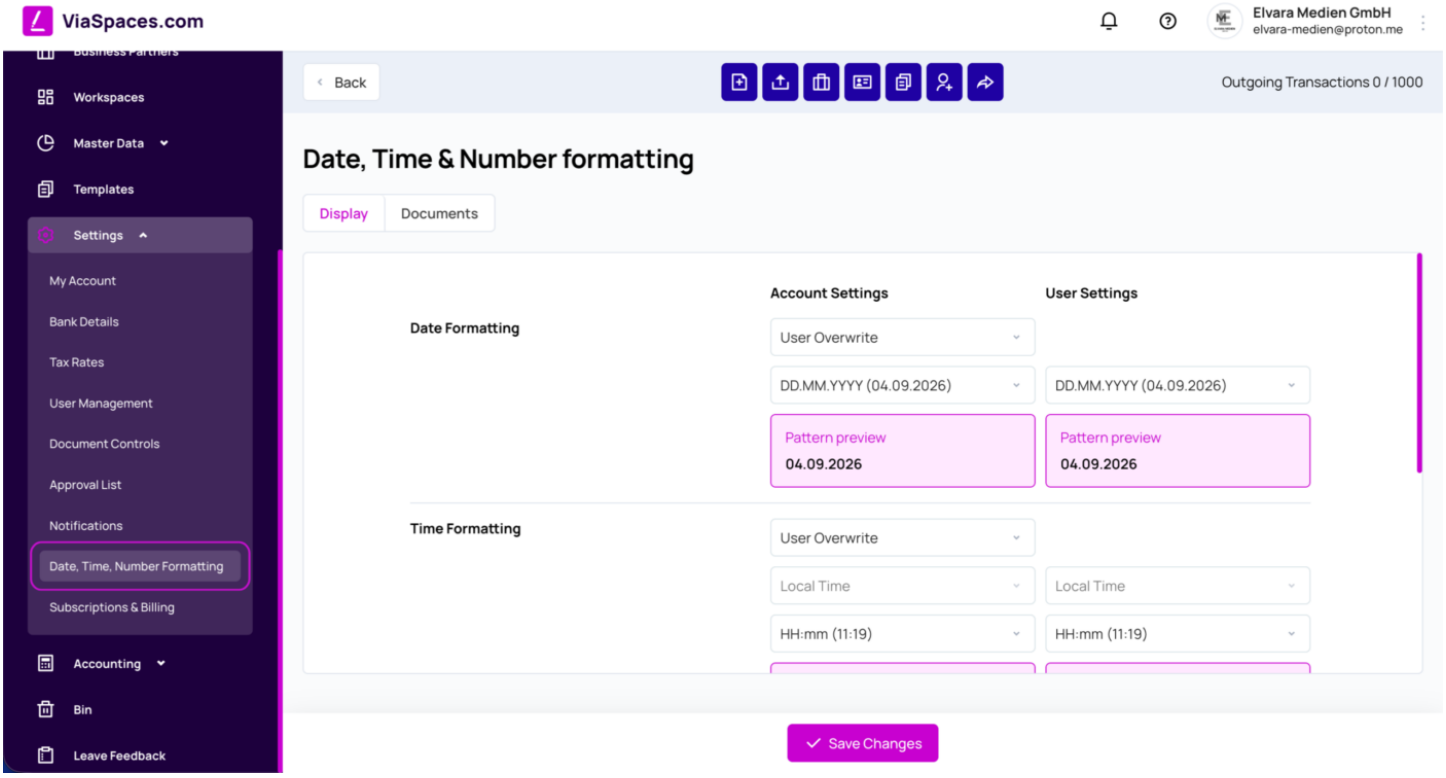
Date, Time, Number Formatting

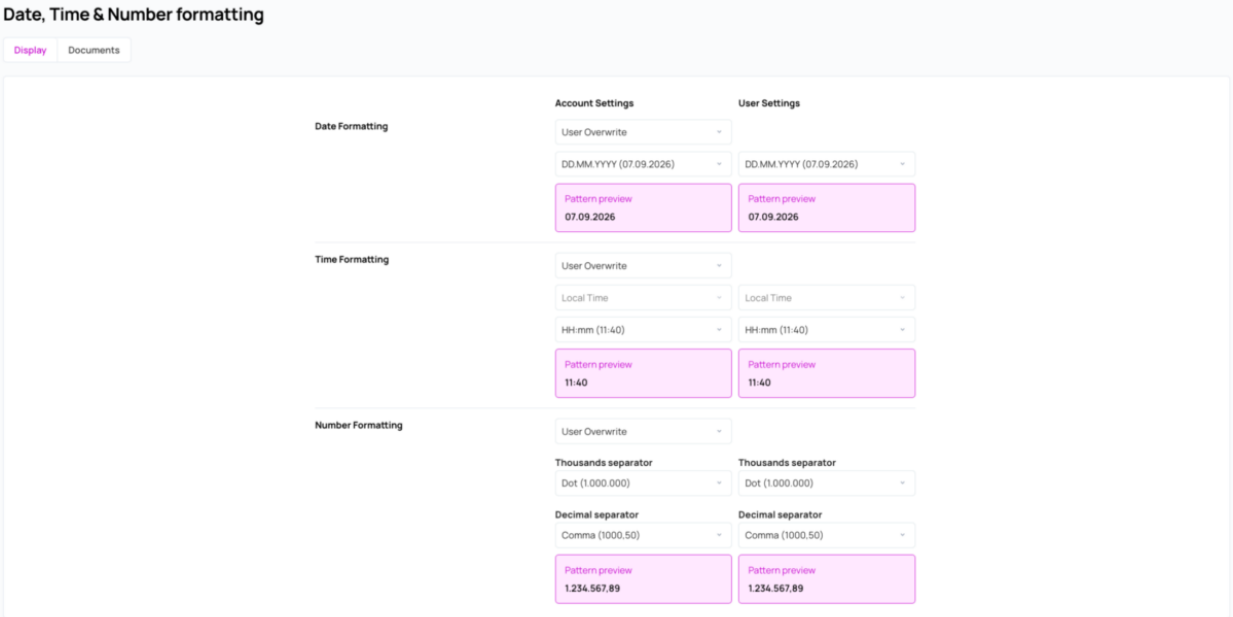
This area sets how dates, times, and numbers display. It has two tabs: **Display** (the application interface) and **Documents** (generated documents).

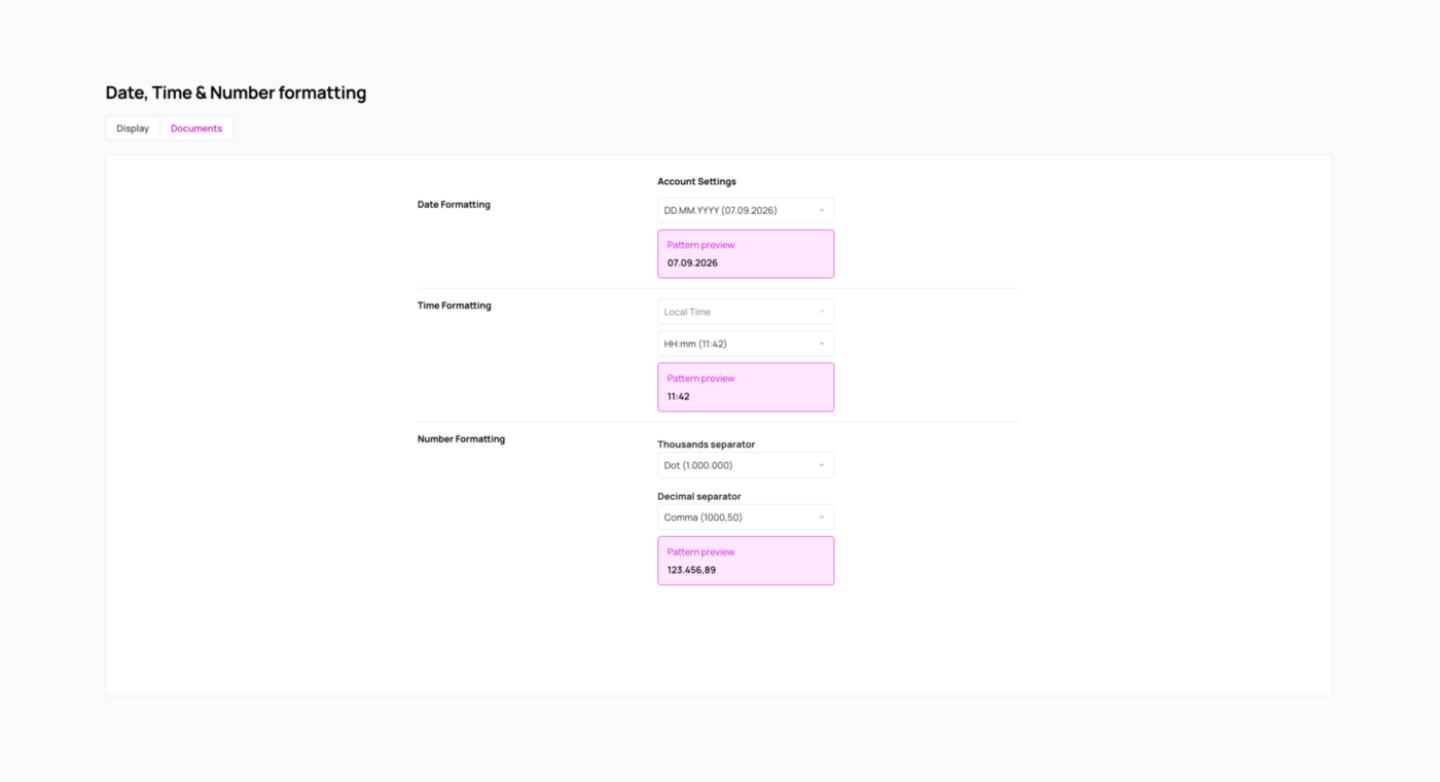
Group	Options
Date Formatting	Date pattern, for example D. M. YYYY.
Time Formatting	Local Time and time pattern, for example H:mm.
Number Formatting	Thousands separator and decimal separator.

Each group shows a **Pattern preview**. The **Account Settings** column sets the account default. When it is set to **User Overwrite**, a **User Settings** column appears and each user can set their own format.

Save with **Save Changes**.


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Workspaces
Master Data
Templates
Settings
My Account
Bank Details
Tax Rates
User Management
Document Controls
Approval List
Notifications
Date, Time, Number Formatting
Subscriptions & Billing
Accounting
Bin
Leave Feedback
Back
Outgoing Transactions 0 / 1000
Date, Time & Number formatting
Display
Documents
Account Settings
User Settings
Date Formatting
User Overwrite
DD.MM.YYYY (04.09.2026)
DD.MM.YYYY (04.09.2026)
Pattern preview
04.09.2026
Pattern preview
04.09.2026
Time Formatting
User Overwrite
Local Time
Local Time
HH:mm (11:19)
HH:mm (11:19)
Save Changes


Date, Time & Number formatting
Display
Documents
Account Settings
User Settings
Date Formatting
User Overwrite
DD.MM.YYYY (07.09.2026)
DD.MM.YYYY (07.09.2026)
Pattern preview
07.09.2026
Pattern preview
07.09.2026
Time Formatting
User Overwrite
Local Time
Local Time
HH:mm (11:40)
HH:mm (11:40)
Pattern preview
11:40
Pattern preview
11:40
Number Formatting
User Overwrite
Thousands separator
Dot (1.000.000)
Thousands separator
Dot (1.000.000)
Decimal separator
Comma (1000,50)
Decimal separator
Comma (1000,50)
Pattern preview
1.234.567,89
Pattern preview
1.234.567,89



Subscriptions & Billing

Subscriptions & Billing manages the account's plan and billing cycle. Each account carries its own subscription.

Control	Function
Business / Personal	Selects the plan family.
Monthly / Annual	Sets the billing cycle.
Select	Applies a plan.

The plan sets the account limits — the number of users and the number of transactions (Send & Upload). Receiving is unlimited on all plans, and transactions over the limit are billed per transaction. When the user limit is reached, adding a user shows an **Update plan** option.

Note: For current plans, limits, and prices, see pricing.

