SBM Help Manual

Task-by-task guide and a topical index. Print or save this page as PDF.

Getting Started

Q: What is Abkus?
A: Abkus SBM is a smart business management platform for integrated operations, finance, sales, stock, and pricing workflows.
Q: How is Abkus different from other platforms?
A: It combines operational execution, financial control, pricing intelligence, and governance tooling in one workspace instead of splitting those tasks across separate systems.
Q: What languages does the platform support?
A: The platform keeps an internationalization structure for multiple locales, while development content stays English-first until the final translation phase.
Q: Is my data secure?
A: Yes. The current workspace includes access control, auditability, password reset, verification flows, backup rehearsal, and monitored operational boundaries.
Q: How can I contact support?
A: You can reach us through our contact form, by email at support@abkus.com, or by using the feedback feature in the app. We typically respond within 24 hours.
Q: Is there a mobile app?
A: Abkus SBM currently ships as a responsive web application. Mobile usability is part of the active quality gate for launch readiness.
Q: How do I use US sales tax helpers?
A: Go to Settings ? US sales tax, keep customer ZIP and state filled, and use Commercial ? US sales tax exemption when needed. Sales calculate destination estimates automatically. See the Application Manual tax section and Admin Help ? US sales tax after login.
Q: What do the AI agents do?
A: Agents propose next actions for collections, pricing, cash scenarios, and supplier RFQs. You always approve or reject before anything important is applied.

Pricing & Tax

Q: How does Abkus SBM calculate product prices?
A: The pricing engine combines cost inputs, variable costs, fixed cost allocation, and market references to suggest optimal sale prices. You review and approve every suggestion before it becomes active.
Q: Can I set different prices for different customer segments?
A: Yes. Use price lists to define sale, purchase, and promotional prices. Each list can target specific customers, date ranges, and product groups.
Q: Does the platform support Brazilian taxes (ICMS, PIS, COFINS, IPI)?
A: Yes. The fiscal module supports NF-e/NFC-e/NFS-e/CT-e emission with multiple providers including Focus NFe. Configure tax regimes and rates in Settings ? Fiscal.
Q: How does US sales tax work in the platform?
A: Go to Settings ? US Sales Tax to configure provider integration (Avalara, TaxJar, Vertex, or Stripe Tax). Sales automatically calculate destination-based estimates based on customer ZIP and state.
Q: Can I track competitor prices for market comparison?
A: Yes. The Competitor Mapping and Competitor Price Log features let you track competitor product prices over time, giving you market intelligence for your own pricing decisions.
Q: What is the refund policy for subscriptions?
A: Every paid plan is sold as a trial: you add your card at signup but are only charged when

the trial ends. Cancel before the trial ends and you pay nothing.

Tax obligations

Q: Which tax obligations does Abkus SBM track?
A: The recurring filings for your company profile: US Form 1120/1120-S/1065 and Form 5472 for foreign-owned single-member LLCs, plus Brazil DAS, DARF, DCTFWeb, EFD, ECD, ECF and DEFIS. The calendar is generated from your fiscal profile.
Q: Where do the calculated amounts come from?
A: From your own books - revenue, expenses and bank movements already recorded in SBM. You review the calculated amount before any form is generated, and nothing is filed automatically.
Q: Does Abkus file or pay on my behalf?
A: No. SBM prepares, calculates and routes the filing; approval and payment are always your decision, and every calculate, approve and pay action is written to the audit trail.
Q: How do I get the official form?
A: Open the filing, generate the official form (Form 5472, 1120 pro-forma, DAS or DARF), review, approve and download it. Form 5472 is delivered to the IRS by fax and the acknowledgement is stored as proof on the filing.
Q: What is Form 5472 and why does it need extra data?
A: Form 5472 reports transactions between a US disregarded entity or corporation and its foreign owner. Record contributions, distributions and loans under Partner transactions and SBM fills Part IV/V from those records.
Q: Who can see or approve my fiscal data?
A: Only the roles you grant under Fiscal access. Viewing revenue and bank data, editing, approval/signing and payment are separate permissions, and every change is audited.

Products & Services

Q: How do I add a new product to the system?
A: Go to Products ? New Product in the admin panel. Fill in the name, SKU, cost price, sale price, category, and unit. The product becomes available immediately for sales, purchases, and inventory tracking.
Q: What is a BOM (Bill of Materials) and when should I use it?
A: A BOM defines the components that make up a finished product. Use it for manufactured or assembled products where you need to track raw material costs and quantities per finished unit.
Q: Can I create product categories and brands?
A: Yes. Categories help organize products by type (raw materials, finished goods, services), and brands let you group products by manufacturer or supplier. Both are configurable in the admin panel.
Q: How does inventory tracking work?
A: Stock quantities update automatically as you create sales (decrease) and purchases (increase). Stock movements are tracked per product and per transaction for full auditability.
Q: What are variable costs and fixed costs?
A: Variable costs change with production volume (e.g. raw materials, packaging). Fixed costs stay constant regardless of volume (e.g. rent, salaries). Configure both in Settings ? Costs to get accurate product profitability.
Q: How does product duplication work?
A: From any product detail page, use the Duplicate action. It creates a new product with the same base data - just change the name, SKU, and pricing. Useful when adding product variants.

Sales & Cash Flow

Q: How do I create a new sale?
A: Go to Sales ? New Sale. Select the customer, add products or services, set quantities and prices, choose the payment method, and confirm. The sale generates accounts receivable and updates stock automatically.
Q: How do installment sales work?
A: When creating a sale, you can split the total into multiple installments. Set the number of installments and the interval between them. Each installment creates a separate receivable with its own due date.
Q: How do I track accounts receivable?
A: Go to Finance ? Accounts Receivable to see all outstanding customer payments, filter by status (pending, paid, overdue), and record payments. The dashboard also shows overdue amounts and cash flow projections.
Q: Can I generate quotes that convert to sales?
A: Yes. Create a quote in Sales ? New Quote with the customer, products, and prices. When the customer accepts, convert the quote to a sale in one click - all line items and prices transfer automatically.
Q: How do sales commissions work?
A: Assign a salesperson to each sale and set their commission rate in Settings ? Salespeople. Commissions are calculated automatically and can be viewed in the Commissions report under Reports ? Sales.
Q: How do I handle sale returns?
A: Open the original sale and use the Return action. Select which items are being returned and the quantities. The system creates a return record, adjusts stock, and updates the customer's balance.

Suppliers & Purchasing

Q: How do I register a new supplier?
A: Go to Suppliers ? New Supplier. Fill in the company name, tax ID, contact information, and payment terms. Once registered, the supplier is available for purchase orders and product sourcing.
Q: How do I create a purchase order?
A: Go to Purchases ? New Purchase. Select the supplier, add products with quantities and unit prices, set freight costs if applicable, and confirm. Stock updates automatically when the purchase is marked as received.
Q: How does the sourcing intelligence feature work?
A: The Sourcing tool uses AI to help you find better suppliers. Describe what you need, and the AI agent searches for potential suppliers, compares prices, and presents recommendations for your review.
Q: How do I manage accounts payable?
A: Go to Finance ? Accounts Payable to see all outstanding supplier payments. Filter by due date or status, record payments, and track your payment obligations to avoid late fees.
Q: Can I import supplier invoices (XML)?
A: Yes. Go to Invoices ? Import XML and upload the supplier's NF-e XML file. The system parses the invoice automatically, extracting items, taxes, and totals. Review before confirming the import.
Q: How do carrier and freight management work?
A: Register carriers in Settings ? Carriers with their freight modes and contact info. When creating purchases, you can assign a carrier and add freight costs, which are factored into the total landed cost.

Integrations & Tech

Q: What fiscal integrations are available?
A: Abkus SBM integrates with Focus NFe for Brazilian electronic invoicing (NF-e, NFC-e, NFS-e, CT-e) and supports US sales tax providers including Avalara, TaxJar, Vertex, and Stripe Tax.
Q: Can I connect my bank account for reconciliation?
A: Yes. Register your bank accounts in Finance ? Bank Accounts. Import bank statements (OFX/CSV) and use the reconciliation tool to match bank movements with your sales, purchases, and expense records.
Q: Does the platform have an API?
A: The platform provides internal API endpoints for fiscal operations (invoice generation, DANFE/XML download) and customer management. External API documentation is under development.
Q: How do I configure email notifications?
A: Go to Settings ? Notifications to configure which events trigger emails (new sale, overdue receivable, low stock). Email delivery uses Resend as the provider and requires the admin to configure the API key.
Q: Can I use my own cloud storage for documents?
A: Yes. The BYOS (Bring Your Own Storage) feature in Settings ? Storage lets you connect your own S3-compatible storage bucket. Attachments, invoices, and documents are stored in your own infrastructure.
Q: How do I set up multi-company management?
A: Go to Settings ? Companies to add additional companies to your account. Each company has its own products, customers, sales, and financial records with independent access control and reporting.

Fiscal Documents

Q: What fiscal documents does Abkus SBM support?
A: Abkus SBM supports Brazilian electronic invoices: NF-e (goods), NFC-e (consumer sales), NFS-e (services), and CT-e (freight transport). The system generates DANFE (printable invoice) and provides XML download for each issued document.
Q: How do I configure fiscal providers for NF-e emission?
A: Go to Settings ? Fiscal and select your fiscal provider (Focus NFe or SEFAZ Direct). Upload your A1 digital certificate, enter the CSC token, configure the NF-e series and tax regime, and set the SEFAZ environment (production or sandbox).
Q: How do I issue an NF-e for a sale?
A: Open the sale and use the Invoice action. The system creates an invoice record, sends the NF-e to your configured fiscal provider, and stores the SEFAZ authorization protocol. You can download the DANFE (PDF) and XML from the invoice detail page.
Q: What is IBS/CBS/IS and how does it affect my invoices?
A: IBS (state/municipal tax), CBS (federal tax), and IS (selective tax) are new consumption taxes from Brazil's 2023 tax reform now being enforced. Abkus SBM calculates these taxes per item and includes them in NF-e payloads, with configurable rates per product and service.
Q: Can I import supplier NF-e XML files?
A: Yes. Go to Invoices ? Import XML, upload the supplier's NF-e XML file, and the system automatically parses the issuer, recipient, items with NCM/CFOP codes, and tax totals. Review the extracted data before confirming the import.
Q: Who is responsible for tax calculation and payment?
A: The subscriber company is fully responsible for tax calculation, reporting, and payment. Abkus SBM provides the tools to calculate, emit, and track fiscal documents, but does not

act as an accountant or tax advisor. Always consult your accounting professional for compliance.