



DMS

Document Management Service

Make Your ERP Truly Paperless



Account**GST**.com

Overview

DMS (Document Management System) is a smart plugin designed to eliminate manual document handling and bring your business closer to a **paperless workflow**.

With its unique **QR-based technology**, DMS allows you to upload physical documents directly into your ERP system using any mobile phone — without requiring scanners or mobile applications. Every document generated from ERP (invoice, challan, voucher, etc.) includes a unique QR code. Simply scan the QR, capture the document, and it gets automatically linked to the correct entry in your ERP.

This ensures that your important documents are always **organized, secure, and instantly accessible** — anytime, anywhere.



Business Benefits

✓ **No Hardware Investment**

No need to buy scanners or additional devices.

✓ **Zero Training Required**

Anyone can use it with a simple mobile camera. (No image is stored on the mobile — it is directly uploaded to ERP.)

✓ **Instant Document Linking**

Every document is automatically attached to the correct ERP entry.

✓ **Time Saving & Efficiency Boost**

No searching files, no manual filing, no confusion.

✓ **Paperless Office Environment**

Reduce physical storage and go fully digital.

✓ **Stronger Audit & Compliance**

Access documents instantly during audits.

✓ **Improved Customer Trust**

Keep signed proofs and records always ready.

✓ **Secure Cloud Storage**

Role-based access ensures data safety and control.

Prerequisites & Compatibility, Commercial

To get started with DMS, you need Cloudinary storage setup:

Minimum **2 Gmail accounts** required

Each Cloudinary free plan offers:

✓ 25K image uploads per month

✓ 25 GB secure cloud storage

✓ 25 GB monthly bandwidth

👉 For higher usage, you can create multiple Cloudinary accounts to **optimize storage and minimize operational cost.**

	Essential INR	Business INR	Ultimate INR	Ultimate Pro INR	Enterprise INR	Corporate INR
DMS	--	--	25000	25000	25000	25000
Next Year API Renewal			5000	5000	5000	5000

Terms & Conditions

- Prices mentioned above are exclusive of all taxes. Applicable taxes will be charged extra.
- Plugin pricing may differ based on the software variant, as higher variants consume more cloud bandwidth and user I/O resources.
- Renewal charges for plugins, wherever applicable, are subject to change in future depending on cloud infrastructure and maintenance cost.
- All disputes shall be subject to Indore jurisdiction only.
- In case the customer is using more than one software link, plugin purchase will be required separately for each link.
- Plugins will remain active for all companies created under the same software link.

Configuration & Integration

Cloudinary Account Setup

Open the registration link:

https://cloudinary.com/users/register_free

Create **at least two Cloudinary accounts**.

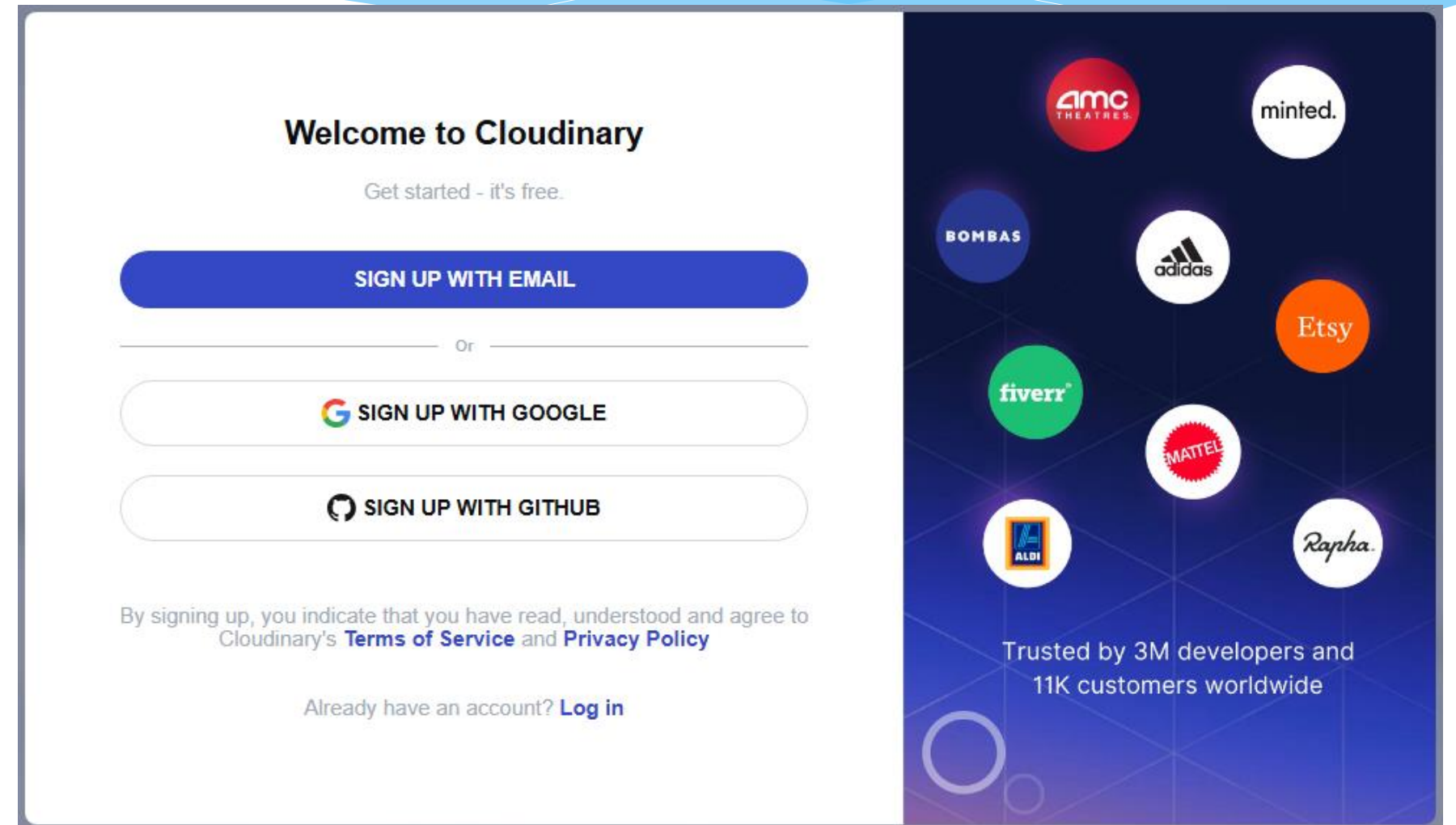
Each account must be registered using a **different Gmail ID**.

Verify each account through the **registered email ID**.

Note: Account verification is mandatory to proceed.

After verification, log in to each Cloudinary account.

Configure the account settings as shown on the **next page**.



Configuration & Integration

Go to Settings – Security – Enable ‘PDF and Zip Files Delivery’ as shown in the picture.

The screenshot displays the Cloudinary configuration interface for user 'dycrsyr8'. The left sidebar contains navigation options: Home, Assets, Image, Video, MediaFlows, and Moderation. The main content area is divided into sections: Product environment settings, Account settings, Billing, and Explore. The 'Security' section is highlighted, showing various configuration options. A green arrow points to the 'Settings' gear icon in the sidebar. Another green arrow points to the 'PDF and ZIP files delivery' checkbox, which is checked.

Product environment settings

- API Keys
- Upload
- Bulk Delete
- Backup
- Optimization
- Webhook Notifications
- Security**

Account settings

- My Profile
- Account
- Product Environments
- User Management
- Account Security

Billing

- Plan Details
- Billing Information

Explore

- Add-ons

Restricted video types:

- URL2PNG
- Vimeo
- YouTube video
- Uploaded
- Worldstarhiphop

A list of services that are restricted from use with dynamic URLs. Images of restricted services can only be created explicitly using the authenticated API or signed URLs.

Unsigned actions allowed:

- Fetch
- Auto chaptering
- Auto transcription
- Auto video details
- In-video search

Same as Restricted image types but only applies to video resources.

By default, you must sign all media files that are delivered using these actions. If you allow unsigned actions, keep in mind that users can potentially perform actions that consume your quota.

Allowed fetch domains:

Limit the domains and subdomains for [fetching remote images](#) (e.g., example.com - includes all subdomains, www.example.com - subdomain only, https://example.com - no subdomains). Enter each allowed domain on a separate line. If empty, fetching is allowed from any domain.

Allowed Admin API IP addresses:

Restrict the source IP addresses that can access the Admin API. Any IP addresses you add should be static and not dynamically assigned by an ISP. Your current IP address is: 45.248.188.43

Usage of tags/context/metadata in transformation URLs:

Enabled

When selected, tag, context, and metadata values can be exposed in URLs (for example, using [conditions](#) or [user-defined variables](#)). When cleared, URLs that expose tags or context values return an error.

PDF and ZIP files delivery:

- Allow delivery of PDF and ZIP files

Temporary Cloudinary support access:

- Allow temporary access

You can allow Cloudinary to access your account for a specific amount of time:

Configuration & Integration

DMS Account Configuration

To set up DMS in your ERP:
Open AccountGST Dashboard
Go to:
Tools → Company Settings – Profile –
Enable DMS module

Now, Go to:
Tools → Company Settings → Others → DMS → Account Setup

Proceed to create the **DMS account** by following the instructions provided on the **next page**.

Programs & Features

API Gateway [Enable Disable]
Batches & Expiry [Enable Disable]
Birthday or Anniversary Reminder [Enable Disable] Default is 'Enable'.
Broker [edit](#)
Credit Days On Invoice [Sale Sale & Purchase Disable]
CRM
Complaint [Enable Disable] Default is 'Enable'.
Enquiry [Enable Disable] Default is 'Enable'.
Feedback [Enable Disable] Default is 'Enable'.
Auto generate feedback [On the sale of specific product. On sale to a specific customer. Both]
Customer Introduced By [Enable Disable] If Enable, it gives an option to maintain record of customer's Introducer OR Guarantor.
Customer Special Discount [Enable Disable] If Enable, it gives an option to give special discount to customer.
Customer's Transporter [Enable Disable]
Customer Lost [Enable Disable]
If enabled, it monitors customer's purchase and alert you if that customer stop doing business by Days. default value 120 days
Customized Shortcut [Enable Disable]
DataXfer [Enable Disable]
DMS (document management service) [Enable Disable]
Dispatched Tracking [Enable Disable]
Customer confirmation code will require , when he / his bearer collect the material from premises []
Credit Note. []
Debit Note. []
Delivery Challan. []

HO, A - Demo Company (F.Y.:2028-27) Variant : Corporate ERP

2-Way Authentication
Workflow & Check-Points
API Connecting Key
Communication
Connect To C.A.
Crates Setting
CRM Enquiry Setting
Customer APP Setting
Delivery Challan Setting
DMS
E-Store Setup
Finder Setting
GDN Setting
GRN Setting
GST Setting
Inward Challan Setting
Occupation
POS Setting

Support Welcome: Admin
Refer & Earn My Profile Log-Off
11 Customer Lost View Report
Account Setup
Document Upload Setup
Setting

Configuration & Integration

Now, Go to:
Tools → Company Settings → Others → DMS → Account Setup
Add multiple DMS accounts using the following credentials:
✓ Registered Email ID
✓ Cloud Name
✓ API Key
✓ API Secret
👉 These details can be obtained from your Cloudinary account dashboard (as shown in the reference image).

S/N	ID	Registered Email ID	Cloud Name	API Key	API Secret	Transformation	
1)	Edit	1	cms2@gridsonlab.com	dpek9aeyb (Default) Usage till date : 01-04-2026 Credits : 3.52% Storage : 0.85% Bandwidth : 0.01% Transformation : 0.02%	299224262738693	aPFYeOnepCLNzYaGhEHfrXIWO5E	Super Lowest

- Home
- Assets
- Image
- Video
- MediaFlows
- Moderation

Product environment settings

API Keys

- Upload
- Bulk Delete
- Backup
- Optimization
- Webhook Notifications
- Security

Account settings

API Keys Cloud name: dycsr8

Manage API key and secret pairs for your product environment. To build the environment variable for each pair, copy the provided format and substitute your actual values for the placeholders. Make sure to store your secrets securely.

API environment variable

```
CLOUDINARY_URL=cloudinary://<your_api_key>:<your_api_secret>@dycsr8
```

Key Name	Date Created	API Key	API Secret	Status
dycsr8	Jan 30, 2020	623149291123131	*****	Active

Configuration & Integration

Dashboard → Tools → Company Settings → Others → DMS → Settings

In this section, you can:

1. Enable document uploading for various vouchers
 2. Allow multiple document uploads per entry
 3. Configure document uploads for both masters and vouchers
- Support different file formats such as PDFs, images, and videos

This feature helps in maintaining all related documents well-organized within the system for easy access and reference.

The screenshot shows the 'DMS Setting' configuration page. At the top, there is a navigation bar with 'Menu', 'ADM, Admin (F.Y.:2026-27)', a 'Support' button, and 'Welcome: Admin'. The page title is 'DMS Setting' with an 'Exit' button. The settings are organized into three sections: 'General', 'Vouchers', and 'Masters'. Each section contains a list of items with radio buttons for 'Enable' and 'Disable' and a note that the default value is 'Disable'.

Section	Item	Enable	Disable	Default Value
General	1) Require Approval	<input type="radio"/>	<input checked="" type="radio"/>	Default value is Disable.
Vouchers	1) Creditnote	<input type="radio"/>	<input checked="" type="radio"/>	Default value is Disable.
	2) Debitnote	<input type="radio"/>	<input checked="" type="radio"/>	Default value is Disable.
	3) Delivery Challan	<input type="radio"/>	<input checked="" type="radio"/>	Default value is Disable.
	4) Expense Voucher	<input type="radio"/>	<input checked="" type="radio"/>	Default value is Disable.
	5) Income Voucher	<input type="radio"/>	<input checked="" type="radio"/>	Default value is Disable.
	6) Inward Challan	<input type="radio"/>	<input checked="" type="radio"/>	Default value is Disable.
	7) Journal	<input type="radio"/>	<input checked="" type="radio"/>	Default value is Disable.
	8) Payment	<input type="radio"/>	<input checked="" type="radio"/>	Default value is Disable.
	9) POS Invoice	<input type="radio"/>	<input checked="" type="radio"/>	Default value is Disable.
	10) Project	<input type="radio"/>	<input checked="" type="radio"/>	Default value is Disable.
	11) Purchase Invoice	<input type="radio"/>	<input checked="" type="radio"/>	Default value is Disable.
	12) Receipt	<input type="radio"/>	<input checked="" type="radio"/>	Default value is Disable.
	13) Sale Invoice	<input checked="" type="radio"/>	<input type="radio"/>	Default value is Disable.
	14) Sales Order	<input type="radio"/>	<input checked="" type="radio"/>	Default value is Disable.
Masters	1) Customer	<input checked="" type="radio"/>	<input type="radio"/>	Default value is Disable.
	2) Employee	<input type="radio"/>	<input checked="" type="radio"/>	Default value is Disable.
	3) Recipient	<input type="radio"/>	<input checked="" type="radio"/>	Default value is Disable.
	4) Salesman	<input type="radio"/>	<input checked="" type="radio"/>	Default value is Disable.
	5) Supplier	<input type="radio"/>	<input checked="" type="radio"/>	Default value is Disable.

Configuration & Integration

Create DMS Folder

Navigate to:

Dashboard → Tools → Company Settings → Others → DMS → Document Upload Setup

Select Masters or Vouchers based on your requirement.

Create a DMS Folder for document uploads.

Configure the necessary parameters as per your business needs.

This setup enables structured and organized document management within the system.

The screenshot shows the 'DMS Setup' page for 'Sale Invoice'. The 'Document Name' field is empty, with a placeholder 'eg.: Proof Of Delivery (POD)'. The 'Media Type' is set to 'Image', 'Upload' is 'After Voucher Creation', 'Compulsory' is 'No', 'Outside Upload' is 'No', 'Allow in Communication' is 'No', and 'Delivery Order / Dispatch tracking' is 'No'. A 'Create' button is visible. Below the form is a table with one entry for 'LR Copy'.

S/N	ID	Sequence No.	Document Name	Media Type	Upload	Compulsory	Outside Upload	Allow In Communication	Delivery Order / Dispatch Tracking
1)	Edit	146	1	LR Copy	Image	After Voucher Creation	Yes	Yes	Yes

The screenshot shows the 'DMS Setup' page for 'Customer Master'. The 'Document Name' field is highlighted in purple, with a placeholder 'eg.: Proof Of Delivery (POD)'. The 'Media Type' is set to 'Image', 'Upload' is 'After Voucher Creation', 'Compulsory' is 'No', and 'Outside Upload' is 'No'. A 'Create' button is visible. Below the form is a table with one entry for 'Profile Photo'.


S/N	ID	Sequence No.	Document Name	Media Type	Upload	Compulsory	Outside Upload	Allow In Communication
1)	Edit	16	0	Profile Photo	Image	On Voucher Creation	No	Yes

Configuration & Integration

Document Upload via QR Code

You can upload images by clicking on the unique QR Code printed on the voucher, as shown in the picture.

You can also view pending DMS documents on the Dashboard and upload them directly from there.

S/N		Description Of Goods / Service	Batch No.	B. MFD	B. Expiry	HSN/SAC	GST	Billed Quantity	UQC	Disc	Price	Disc	Amount		
1)		16 Channel DVR Hikvision				7896	18%	2	UNT	-10519.47%	9,000.00		18,000.00		
2)		16 Channel DVR Hikvision				7896	18%	5	UNT	-10519.47%	9,000.00		45,000.00		
3)		Asus 1 MP Dome NV Model 100				8425	18%	2	PCS		4,000.00		8,000.00		
												9	71,000.00		
													12,780.00		
													12,780.00		
													0		
													83,780.00		
Amount Chargeable (In Words)															
Eighty Three Thousand Seven Hundred And Eighty Rupees Only															
Taxable Amt		IGST	Total GST											Roundup	0
71,000.00		12,780.00	12,780.00											Grand Total	83,780.00
Scan & Upload															
		<small> Terms & Conditions: Warranty And Claims: All warranties/Claims of the products will be covered by respective manufacturer/service centers as per their terms and conditions. Risk Difference Pay on Overdue Bill: 1% on value of Invoice. </small>										<small> Declaration: Subject to _____ Jurisdiction. Goods Sold as Bill. Prices are approved from Customer's side. Material has been delivered with this Invoice Copy / Challan Copy. </small>			
For Admin															
Buyer Seal And Signature				This is a Computer Generated TAX INVOICE						Authorized Signatory					

Stock In Hand	Out Of Stock	Non Paying Customers	: 26	Job Work Invoice	: 1	Enquiry	: 5
Negative Stock	Dead Stock	Payment Collection	: 3	Journal : Reconcile	: 1	Enquiry Collection	: 1
Stock Movement	Stock In Location	Product Cost Analysing	: 12	Master : Reconcile	: 66	Sales Opportunity : Skipped	: 3
Procurement		Project : Work Stopped	: 11	Over Due Purchase Bills	: 45		
		Purchase : Approval	: 31	Over Due Sale Invoices	: 75		
		Purchase Order : Approval	: 3	POS : Reconcile	: 1		
		Sales Opportunity : Holdback	: 3	Purchase : Reconcile	: 8		
		Sales Order : Direct Portal Approval	: 6	Receipt : Reconcile	: 4		
		Sales Order : Dispatch Skipped	: 9	Receipt On-Account	: 6		
		Suppliers Unclear Payment	: 41	Sale : Reconcile	: 41		
				Suppliers Payment Preparation	: 45		
				Today's Cheques Clearance	: 1		
Supplier		Purchase & Store Department		Order Process Management		Document Management	
Purchase	Payment	Dispatched Tracking	: 56	Delivery Challan	: 11	Customer Master	: 5
Debit Note	Expense	GRN	: 2	GDN	: 24	Sale Invoice	: 2
Purchase Order		Inward Challan	: 3	POS Order Ticket	: 4		
Reports		Job Work Planning	: 7	Project	: 11		
Purchase Book	Payment Report	Procurement	: 4	Quotation	: 2		

Q & A

1. Do I need a scanner machine?

👉 No. You can upload documents using any mobile phone camera.

2. Do I need to install a mobile app?

👉 No. It works directly through your mobile browser.

3. How does the system identify the correct document?

👉 Each ERP document has a unique QR code. When scanned, it automatically links to the correct entry.

4. Can I control who can view or upload documents?

👉 Yes. DMS provides role-based user access control.

5. Is my data secure?

👉 Yes. Documents are stored securely with encryption and controlled access.

6. Is there any limit on document uploads?

👉 There is no limit from ERP side. Storage depends on your cloud plan.

THANKS!

Any questions?

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