



# Document Management Service

Make Your ERP Truly Paperless



AccountGST.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](https://cloudinary.com/users/register_free)

Create **at least two Cloudinary accounts**.

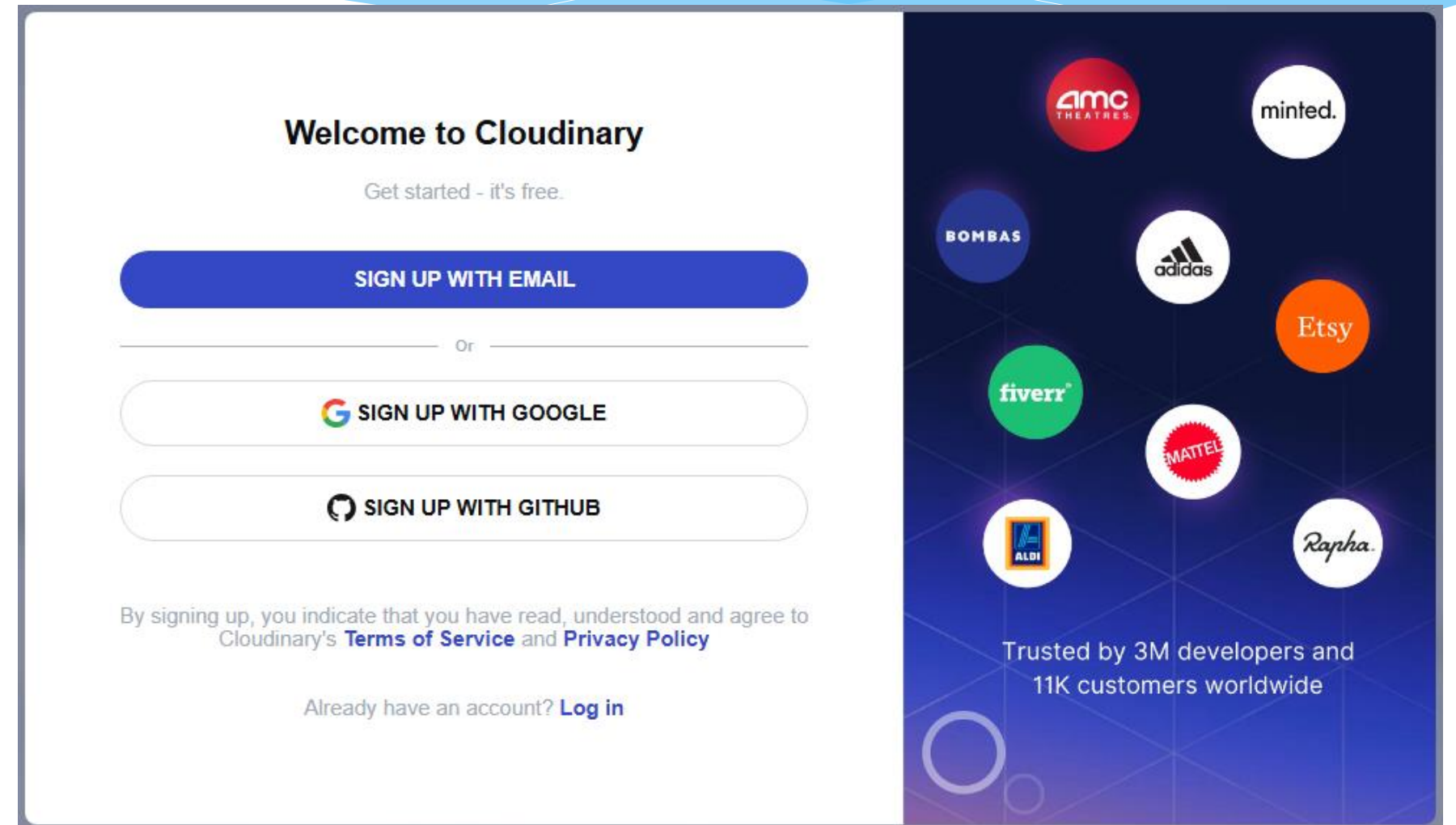
Each account must be registered using a **different Gmail ID**.

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 settings. 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. The 'PDF and ZIP files delivery' section includes a checkbox labeled 'Allow delivery of PDF and ZIP files'. Other settings include 'Restricted video types', 'Unsigned actions allowed', 'Allowed fetch domains', 'Allowed Admin API IP addresses', 'Usage of tags/context/metadata in transformation URLs', and 'Temporary Cloudinary support access'.

**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 ]  Display all batches on the vouchers in a table format.
- 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 ] Plugin required, contact AccountGST's team for more details. DataXfer enables fast and secure transfer of accounting data between AccountGST databases, allowing selective migration of Sales, Purchase, Payment, and Receipt transactions along with customize GST reports.
- DMS (document management service) [  Enable  Disable ] Plugin required, contact AccountGST's team for more details.
- 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 | Support | Welcome: Admin

Refer & Earn | My Profile | Log-Off

Workflow & Check-Points

API Connecting Key

Communication

Connect To C.A.

Crates Setting

CRM Enquiry Setting

Customer APP Setting

Delivery Challan Setting

**DMS** ▶ Account Setup

E-Store Setup

Finder Setting

GDN Setting

GRN Setting

GST Setting

Inward Challan Setting

Occupation

POS Setting

Customer Lost: 11 (0)

View Report

Business Health

Outstanding

Open

Rank Cash

# 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).

Menu HO, A - Demo Company (F.Y.:2026-27) Support Welcome: Admin

### DMS Account

Registered Email ID \*

Cloud name \*

API Key \*

API Secret \*

Image/Video Transformation \*  Auto  Best  Good  Eco  Low  Lowest  Super Lowest Default values is 'Low'.

Page 1 show record 50 per page

[List Of Existing](#)

S/N	ID	Registered Email ID	Cloud Name	API Key	API Secret	Transformation	
1)	<a href="#">Edit</a>	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

dy dycsr8

- 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
```

[+ Generate New API Key](#)

Key Name	Date Created	API Key	API Secret	Status
dycsr8	Jan 30, 2020	623149291123131	*****	<input checked="" type="checkbox"/> 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' page in a web application. The page is titled 'ADM, Admin (F.Y.:2026-27)' and includes a 'Support' button and a 'Welcome: Admin' message. The 'DMS Setting' section is divided into three categories: General, Vouchers, and Masters. Each category contains a list of items with radio buttons for 'Enable' and 'Disable' options, and a note indicating the default value.

Category	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.
Vouchers	2) Debitnote	<input type="radio"/>	<input checked="" type="radio"/>	Default value is Disable.
Vouchers	3) Delivery Challan	<input type="radio"/>	<input checked="" type="radio"/>	Default value is Disable.
Vouchers	4) Expense Voucher	<input type="radio"/>	<input checked="" type="radio"/>	Default value is Disable.
Vouchers	5) Income Voucher	<input type="radio"/>	<input checked="" type="radio"/>	Default value is Disable.
Vouchers	6) Inward Challan	<input type="radio"/>	<input checked="" type="radio"/>	Default value is Disable.
Vouchers	7) Journal	<input type="radio"/>	<input checked="" type="radio"/>	Default value is Disable.
Vouchers	8) Payment	<input type="radio"/>	<input checked="" type="radio"/>	Default value is Disable.
Vouchers	9) POS Invoice	<input type="radio"/>	<input checked="" type="radio"/>	Default value is Disable.
Vouchers	10) Project	<input type="radio"/>	<input checked="" type="radio"/>	Default value is Disable.
Vouchers	11) Purchase Invoice	<input type="radio"/>	<input checked="" type="radio"/>	Default value is Disable.
Vouchers	12) Receipt	<input type="radio"/>	<input checked="" type="radio"/>	Default value is Disable.
Vouchers	13) Sale Invoice	<input checked="" type="radio"/>	<input type="radio"/>	Default value is Disable.
Vouchers	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.
Masters	2) Employee	<input type="radio"/>	<input checked="" type="radio"/>	Default value is Disable.
Masters	3) Recipient	<input type="radio"/>	<input checked="" type="radio"/>	Default value is Disable.
Masters	4) Salesman	<input type="radio"/>	<input checked="" type="radio"/>	Default value is Disable.
Masters	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 'Voucher' is set to 'Sale Invoice'. The 'Document Name' field is empty, with a placeholder 'eg.: Proof Of Delivery (POD)'. The 'Media Type' is set to 'Image'. The 'Upload' option is 'After Voucher Creation'. The 'Compulsory' option is 'No'. The 'Outside Upload' option is 'No'. The 'Allow in Communication' option is 'No'. The 'Delivery Order / Dispatch tracking' option is 'No'. There is a 'Create' button and a 'List Of Existing' link. Below the form is a 'Multiple Editing/Updating Tool' section with a button to 'Sync the current DMS's setting with the existing Sale Invoice'. At the bottom is a table with columns: S/N, ID, Sequence No., Document Name, Media Type, Upload, Compulsory, Outside Upload, Allow In Communication, and Delivery Order / Dispatch Tracking.

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

The screenshot shows the 'DMS Setup' page for 'Customer Master'. The 'Voucher' is set to 'Customer Master'. The 'Document Name' field is empty, with a placeholder 'eg.: Proof Of Delivery (POD)'. The 'Media Type' is set to 'Image'. The 'Upload' option is 'After Voucher Creation'. The 'Compulsory' option is 'No'. The 'Outside Upload' option is 'No'. There is a 'Create' button and a 'List Of Existing' link. Below the form is a 'Multiple Editing/Updating Tool' section with two buttons: 'Sync the DMS Master below with the existing Customer Master' and 'Sync the current DMS's setting with the existing Customer Master'. At the bottom is a table with columns: S/N, ID, Sequence No., Document Name, Media Type, Upload, Compulsory, Outside Upload, and Allow In Communication.

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

# Configuration & Integration

## Document Upload via QR Code

You can upload images directly by using the unique QR Code printed on the voucher, as shown in the picture. Simply open a QR Code scanner on your mobile phone and scan the code printed on the document. Tap on the link that appears to open it in your browser.

A window will open for image upload, as shown in the picture. From there, click on the camera icon to capture a photo instantly or use the upload icon to select and upload an image from your device.

GSTIN: 22AAAAA0000A1Z5 **TAX INVOICE** Original for Recipient (Page 1/1)

**Admin**  
123  
07314050428


**Buyer**  
ADI HARSH SOLAR SOLUTION  
254, Sonawane, Deogaon  
Mumbai - Maharashtra  
PIN : 423701  
GSTIN : 27PGBPS2157E1Z3

**Invoice No. : INV2627-3** **Invoice Date : 13-04-2026**  
P.O. No. : P.O. Date :  
Challan No. : DC-2627-1, DC-2627-2 Pay. Mode : Credit  
Bill Pay Status : Due 83,780.00 Bill Credit : 0 Days  
Due Date : 13-04-2026 Location : Shop  
Operator : Admin  
Delivery By : LR No. :  
**Last Transaction:**  
Old Balance = (Debit) 1,21,776.00  
Adding this Invoice Amount +83,780.00  
New Balance after this Invoice = (Debit) 2,05,556.00

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
												0
												83,780.00

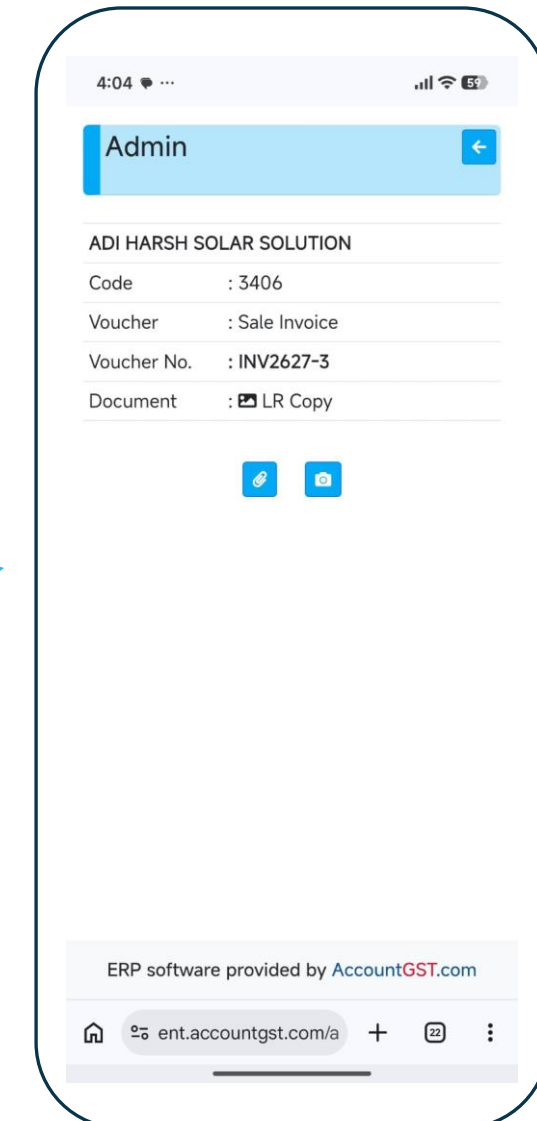
Taxable Amt 71,000.00 IGST 12,780.00 Total GST 12,780.00 Roundup 0  
**Grand Total 83,780.00**

Amount Chargeable (In Words)  
Eighty Three Thousand Seven Hundred And Eighty Rupees Only

**Scan & Upload**  Terms & Condition: Warranties And Claims: All warranties/claims of the products will be covered by respective manufacturer/service centers as per their terms and conditions. Sale Difference Pay on Overdue Bill: 1% on value of Invoice. Declaration: Subject to Jurisdiction. Goods Sold as bill. Prices are approved from Customer side. Material has been delivered with this Invoice Copy / Challan Copy.

For Admin

Buyer Seal And Signature This is a Computer Generated TAX INVOICE Authorized Signatory





# 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?

You can find me at:

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Website: [www.gridsonlab.com](http://www.gridsonlab.com)



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