# Settings- General


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# Basic

# Overview

The **Basic** settings section allows users to configure the general information, contact details, special pages, project availability, QR codes, and other basic configurations for the project.

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# Access Path

**Leftside Bar → Settings → General → Basic**

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# My Project

The **My Project** section contains the basic project information.

## Title

Enter the name of the project in the **Title** field.

## Slug

The **Slug** defines the unique identifier used for the project.

Only the following characters are allowed:

- Lowercase letters (`a-z`)
- Numbers (`0-9`)
- Dash (`-`)
- Underscore (`_`)

## App Page

Select the page that should be used as the main **App Page**.

# Web Page

Select the page that should be used as the main **Web Page**.

# Currency

Select the currency used by the project.

# Language

Select the language required for the project.

Click **Submit** to save the project information.

---

# Contact

The **Contact** section allows users to configure the project's contact information.

Available fields include:

- **Phone**
- **Email**

Enter the required contact details and click **Submit** to save the changes.

---

# Special Pages

The **Special Pages** section allows users to assign specific pages to predefined system functions.

Available special page configurations include:

- **Cart**
- **Login**
- **Map**
- **Map Point**
- **Map Track**
- **Order Details**
- **Order History**
- **Profile**

- **Search**
- **User Addresses**

Select the required page from the corresponding dropdown for each special page.

This allows the system to use the selected page for the respective functionality.

---

# Project Status

The project status section provides controls for changing project availability.

## Published

The **Published** option controls whether the project is published.

## Searchable

The **Searchable** option controls whether the project can be searched.

Click the respective button to change the required status.

---

# Web QR Code

The **Web QR Code** section provides a QR code for sharing the project through the web.

The section includes:

- Project sharing URL
- QR Code
- **Download QR Code** button
- **Campaign**
- **Query Parameter**
- **Color**
- **Background**

## Campaign

Enter a campaign identifier for the QR code.

Only lowercase alphanumeric characters, dashes (`-`), and underscores (`_`) are allowed.

# Query Parameter

Enter the required query parameter for the QR code URL.

Only lowercase alphanumeric characters, dashes (`-`), and underscores (`_`) are allowed.

# Color

Select the required QR code color.

# Background

Select the required QR code background.

# Download QR Code

Click **Download QR Code** to download the generated web QR code.

---

# App QR Code

The **App QR Code** section provides a QR code for sharing the project through the application.

The section includes:

- App sharing URL
- QR Code
- **Download QR Code** button
- **Campaign**
- **Query Parameter**
- **Color**
- **Background**

# Campaign

Enter the campaign identifier for the App QR code.

# Query Parameter

Enter the required query parameter for the App QR code.

## Color

Select the required QR code color.

## Background

Select the required QR code background.

## Download QR Code

Click **Download QR Code** to download the generated App QR code.

---

# Configurations

The **Configurations** section provides additional project-level configuration options.

## Image Loader

The **Image Loader** setting controls the image loading behavior.

Select the required option from the dropdown and click **Submit** to save the configuration.

---

# Basic Settings Workflow

1. Navigate to **Settings → General → Basic**.
2. Configure the **My Project** details.
3. Add the required **Contact** information.
4. Configure the required **Special Pages**.
5. Set the **Published** and **Searchable** status.
6. Configure the **Web QR Code** and **App QR Code**, if required.
7. Configure the **Image Loader** setting.
8. Click the respective **Submit** buttons to save the changes.

# Style

# Assets

# Overview

The **Assets** section allows users to manage project-level assets such as the **Project Logo** and **Image Loader**.

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# Access Path

**Left Sidebar → Settings → General → Assets**

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# Project Logo

The **Project Logo** section allows users to add and manage the logo associated with the project.

## Edit Logo

Click **Edit Logo** to update the existing project logo.

## Delete Logo

Click the **Delete** icon to remove the currently configured project logo.

---

# Image Loader

The **Image Loader** section allows users to configure an image loader for the project.

## Add Image Loader

To add an image loader:

1. Navigate to **Assets**.
2. Click **Add Image Loader**.
3. Configure the required image loader details.
4. Save the configuration.

The configured image loader can be used to display a loading image while content is being loaded.

---

# Asset Management Workflow

1. Open the **Left Sidebar**.
2. Navigate to **Settings → General → Assets**.
3. Manage the **Project Logo** as required.
4. Add or configure an **Image Loader**, if required.
5. Update or remove existing assets using the available options.

# Order Settings

## Overview

The **Order Settings** section provides configuration options for managing the ordering process, cart behavior, address preferences, and order-related questions.

### Access Path

**Left Side Bar → Settings → Order Settings**

---

## Business Note

Use the **Business Note** field to add important information or instructions related to orders.

**Example:**

> Orders are processed within 24 hours. Please ensure that the delivery address and contact details are correct before placing the order.

Click **Save** to apply the changes.

---

## Minimum Order Price

The **Minimum Order Price** option allows you to define the minimum order value required for customers to place an order.

**Example:**

**Currency:** INR
**Minimum Order Price:** `500`

With this configuration, customers must have an order value of at least **₹500** before they can place the order.

Click **Save** to apply the changes.

---

# Cart

The **Cart** section allows you to customize the Add to Cart button displayed to users.

## Add to Cart (Button Text)

Enter the text that should appear on the Add to Cart button.

**Example:**

`Add to Cart`

Click **Save** to apply the button text.

## Add to Cart (Button Icon)

Add an icon that will be displayed along with the Add to Cart button.

Click **Add Icon** and select/upload the required icon.

**Example:**

□□ Add to Cart

---

# Preferred Address

The **Preferred Address** section allows you to select the address types that should be available during the ordering process.

Available options include:

- **Shipping Address** – Used for delivering the order.
- **Billing Address** – Used for billing and payment-related information.

**Example Configuration:**

- Shipping Address: **Enabled**
- Billing Address: **Enabled**

Select the required options and click **Save**.

---

# Order Profile Questions

The **Order Profile Questions** section allows you to add additional questions that users need to answer during the ordering process.

Select the required question type from the dropdown.

Available question types include:

- **Short Text** – For short responses such as Name or Company.
- **Long Text** – For detailed responses such as Address or Additional Instructions.
- **Email** – For collecting an email address.
- **Phone** – For collecting a contact number.
- **Number** – For collecting numerical information.

**Example:**

| Question | Type |
|---|---|
| Full Name | Short Text |
| Delivery Instructions | Long Text |
| Email Address | Email |
| Contact Number | Phone |
| Number of Items | Number |

Select the required question type from the dropdown to add it to the order profile.

> **Note:** Click **Save** after making changes to the respective configuration to ensure that the updated settings are applied.

# Users

## Overview

The **Users** section allows you to manage registered users and configure the profile information collected from them. It provides options to view users, manage common profile fields, and create custom profile fields.

### Access Path

**Left Side Bar → Settings → Users**

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# User Management

The **Users** page displays the list of users registered in the project.

The user list includes the following information:

- **Name** – Displays the user's name.
- **Phone** – Displays the user's registered phone number.
- **Created On** – Shows when the user account was created.
- **Status** – Displays the current status of the user.
- **Action** – Provides available actions for managing the user.

The page also provides:

- **Show Entries** – Select the number of users displayed per page.
- **User Status** – Filter users based on their status.
- **Admin Notes** – Filter users based on admin notes.
- **Search** – Search for a specific user.

---

# Manage Profile

Click **Manage Profile** to configure the information collected in the user's profile.

The **Manage Users Profile** section contains two profile types:

- **Common Profile** – Configure commonly used profile fields.
- **Custom Profile** – Create additional profile fields according to project requirements.

---

# Profile Question

Click **Add New Question** to add a new profile field.

Each profile question can be configured using the following options:

## Type

Select the type of information that the user needs to provide.

**Example:**

`Short Text`

Other question types can be selected based on the required input.

## Title

Enter the name or question that will be displayed to the user.

**Example:**

`Full Name`

## Key

Enter a unique key for the profile field.

**Example:**

`full_name`

> **Note:** The key should use valid characters such as letters, numbers, hyphens, underscores, and periods as supported by the system.

## Placeholder

Enter placeholder text to guide the user about what information should be entered.

**Example:**

`Enter your full name`

## Note

Add additional information or instructions related to the profile field.

**Example:**

```
Please enter your name as it appears on your ID.
```

---

# Profile Field Options

The following options are available for configuring the profile field:

- **Required** – Makes the field mandatory for the user.
- **Editable** – Allows the user to edit the field after providing the information.
- **Moderated** – Enables moderation for the profile field.
- **Subtitle** – Allows a subtitle to be displayed with the profile field.

After configuring the profile field, click **Update** to save the changes.

To add additional profile fields, click **Add New Question**.

> **Note:** Configure the profile fields according to the information required from users. Use clear titles, keys, placeholders, and notes to provide a consistent user experience.

# Devices

## Devices

The **Devices** section allows you to view and monitor devices associated with the project. It provides information about the device status, installation source, application version, and location details.

**Access Path:**

**Left Side Bar → Settings → Devices**

**Show Entries:**

10 | 25 | 50 | 100

| # | Online | Install Source | Version | City | Sub State | State | Country |
|---|---|---|---|---|---|---|---|
| 1 | — | — | — | — | — | — | — |

The device list displays the following information:

- **Online** – Shows whether the device is currently online.
- **Install Source** – Displays the source from which the application was installed.
- **Version** – Shows the application version installed on the device.
- **City** – Displays the city associated with the device.
- **Sub State** – Displays the relevant sub-state or regional information.
- **State** – Displays the state associated with the device.
- **Country** – Displays the country associated with the device.

> **Note:** The number of devices displayed per page can be changed using the **Show Entries** dropdown.

# Shares

# Overview

The **Shares** module is used to view and monitor sharing activity within the VirtuBox backend. It provides information about campaigns, share activity, visitor interactions, and visitor device details.

The module includes campaign management, graphical reports, date filtering, and a table displaying available sharing records.

# Navigation Path

**Navigation Path:** VirtuBox → Settings → General → Shares

# Shares Page

The Shares page contains the following main sections:

1. Shares
2. Manage Campaign
3. Date Filter
4. Campaigns
5. Visitors
6. Sharing Activity Table

## Manage Campaign

The **Manage Campaign** option allows users to access campaign management.

Click the **Manage Campaign** button to open the campaign management interface.

Campaigns can be used to organize and monitor sharing activities, depending on the available configuration.

### Date Filter

The date filter allows users to select a specific date range for viewing sharing activity and visitor statistics.

### Available Options

| Option | Description |
|---|---|
| Date Range | Selects the start and end dates for the report. |
| Filter | Applies the selected date range to the displayed information. |

### How to Apply a Date Filter

1. Open the Shares page.
2. Select the required date range.
3. Click the **Filter** button.
4. Review the updated campaign and visitor reports.

### Campaigns

The **Campaigns** section displays a graphical representation of campaign click activity for the selected date range.

### Available Information

- **Campaigns Clicks:** Represents campaign click activity.
- **Chart:** Displays the available campaign click data graphically.

This section helps users monitor campaign engagement over the selected period.

## Visitors

The **Visitors** section displays a graphical representation of daily visitor clicks for the selected date range.

### Available Information

- **Visitors Daily Clicks:** Represents daily visitor click activity.
- **Chart:** Displays the available visitor click data graphically.

This section helps users review visitor activity and understand engagement trends.

## Sharing Activity Table

The sharing activity table displays available records related to campaign and sharing activity.

### Available Fields

| Field | Description |
|---|---|
| # | Displays the serial number of the record. |
| Time | Displays the time associated with the sharing activity. |

| Field | Description |
| --- | --- |
| Campaign | Displays the associated campaign name. |
| Share | Displays the sharing information. |
| City | Displays the visitor's city, when available. |
| State | Displays the visitor's state, when available. |
| Country | Displays the visitor's country, when available. |
| Platform | Displays the visitor's platform information. |
| Browser | Displays the browser used by the visitor. |
| OS | Displays the visitor's operating system. |
| Device | Displays the visitor's device information. |

### Show Entries

The **Show Entries** dropdown allows users to select the number of records displayed on a page.

### Search

The **Search** field allows users to search for records in the table.

### Pagination

The pagination controls allow users to navigate through the available records.

- **Previous:** Moves to the previous page.
- **Page Number:** Displays the current page.
- **Next:** Moves to the next page.

### Horizontal Scrollbar

The horizontal scrollbar allows users to view additional table columns when the table width exceeds the visible area.

## How to View Sharing Activity

Follow these steps to review sharing activity:

1. Log in to the VirtuBox backend.
2. Navigate to **Settings → General → Shares**.
3. Select the required date range.
4. Click **Filter** to apply the date range.
5. Review the **Campaigns** chart.
6. Review the **Visitors** chart.
7. Inspect the sharing activity table.
8. Use the Search field to find specific records.

9. Adjust the Show Entries option to change the number of displayed records.
10. Use the pagination controls to navigate through the records.

## Important Notes

- The displayed reports depend on the selected date range and available activity data.
- Visitor and sharing details may be unavailable when no corresponding records exist.
- The screenshot shows an empty table with `1 of 0`, indicating that no records are currently displayed for the selected filters.
- Campaign and visitor charts may appear empty when no relevant activity data is available.
- Visitor information depends on the data collected by the application.

## Key Benefits

- Provides an overview of sharing activity.
- Displays campaign click statistics.
- Shows daily visitor click activity.
- Provides available visitor platform, browser, operating system, and device details.
- Supports date-based filtering and record searching.
- Allows users to navigate and review available sharing records.

## Conclusion

The **Shares** module provides a centralized interface for reviewing campaign performance, visitor activity, and sharing records. Users can apply date filters, analyze graphical reports, and inspect available visitor and sharing details to monitor engagement within VirtuBox.

# User & Access

# Overview

The **Users and Access** section allows you to manage users who have access to the project. You can add users by entering their email address, define the access expiry date, and manage their assigned roles and permissions.

**Access Path:**

**Left Side Bar → Settings → Users and Access**

---

# Add User

To provide access to another user, enter the user's **Email** address and specify the **Expiry Date** for their access.

**Email**

Enter the email address of the user who should be given access.

**Example:**

`user@example.com`

**Expiry Date**

Set the date until which the user will have access to the project.

**Example:**

`31-Dec-2026`

---

# Users

The **Users** section displays the list of users who have been granted access to the project.

**Show Entries:**

10 | 25 | 50 | 100

| # | Email | Name | Roles | Expiry | Status | Action |
|---|---|---|---|---|---|---|
| 1 | — | — | — | — | — | — |

The user list contains the following information:

- **Email** – Displays the email address of the user.
- **Name** – Displays the user's name.
- **Roles** – Shows the roles or permissions assigned to the user.
- **Expiry** – Displays the access expiry date.
- **Status** – Shows the current access status.
- **Action** – Provides available actions for managing the user's access.

> **Note:** The **Users and Access** section is used to provide and manage access for other users. Configure the appropriate role and expiry date according to the required level and duration of access.

# Credentials

# Overview

The **Credentials** section is used to configure external service credentials for the VirtuBox application. It provides configuration options for SMTP, SMS gateways, and payment gateways.

These settings allow administrators to configure the services required for email communication, SMS functionality, and payment processing.

# Navigation Path

**Navigation Path:** VirtuBox → Settings → General → Credentials

# Credentials Page

The Credentials page contains three main sections:

1. SMTP
2. SMS
3. Payment Gateways

## SMTP Configuration

The **SMTP** section allows administrators to configure the email server settings used for sending emails from the application.

### Available Fields

| Field | Description |
|---|---|
| Host | Specifies the SMTP server hostname or address. |
| Port | Specifies the port used to connect to the SMTP server. |
| Username | Specifies the username used to authenticate with the SMTP server. |
| Password | Specifies the password used for SMTP authentication. |
| Encryption | Specifies the encryption method used for the SMTP connection. |

| Field | Description |
| --- | --- |
| From | Specifies the sender email address. |
| From Name | Specifies the sender name displayed to email recipients. |

### Password Visibility

The Username and Password fields include an eye icon that allows users to show or hide the entered value.

### How to Configure SMTP

1. Navigate to **Settings → General → Credentials**.
2. Locate the **SMTP** section.
3. Enter the SMTP server address in the Host field.
4. Enter the required Port.
5. Enter the SMTP Username.
6. Enter the SMTP Password.
7. Configure the Encryption method.
8. Enter the sender email address in the From field.
9. Enter the sender name in the From Name field.
10. Click **Save** to save the configuration.

## SMS Configuration

The **SMS** section allows administrators to select an SMS gateway for sending SMS messages through the application.

### Available Fields

| Field | Description |
| --- | --- |
| Select SMS Gateway | Allows users to select the required SMS gateway from the available options. |

### How to Configure SMS

1. Navigate to **Settings → General → Credentials**.
2. Locate the **SMS** section.
3. Open the Select SMS Gateway dropdown.
4. Select the required SMS gateway.
5. Click **Save** to save the configuration.

## Payment Gateways Configuration

The **Payment Gateways** section allows administrators to select a payment gateway for processing payments through the application.

### Available Fields

| Field | Description |
| --- | --- |
| Select Payment Gateway | Allows users to select the required payment gateway from the available options. |

### How to Configure Payment Gateways

1. Navigate to **Settings → General → Credentials**.
2. Locate the **Payment Gateways** section.
3. Open the Select Payment Gateway dropdown.
4. Select the required payment gateway.
5. Click **Save** to save the configuration.

## Important Notes

- Enter the correct SMTP server details before saving the configuration.
- Ensure that the SMTP username and password are valid.
- Select the appropriate encryption method supported by the SMTP server.
- Select an SMS gateway that is available and supported by the application.
- Select a payment gateway that is available and supported by the application.
- Verify that the configurations are saved successfully.
- Do not share SMTP passwords or other sensitive credentials with unauthorized users.

## Troubleshooting

### Emails Are Not Being Sent

- Verify the SMTP Host and Port.
- Check the Username and Password.
- Confirm that the Encryption method matches the SMTP server requirements.
- Verify the sender email address.
- Check the SMTP server connectivity and configuration.

### SMS Messages Are Not Being Sent

- Verify that the correct SMS gateway is selected.
- Confirm that the selected gateway is configured and operational.
- Check the gateway credentials and service availability, if applicable.

### Payments Are Not Being Processed

- Verify that the correct payment gateway is selected.
- Confirm that the payment gateway is configured and operational.
- Check the gateway credentials and integration settings, if applicable.

## Key Benefits

- Centralizes external service configuration.

- Supports SMTP email configuration.
- Provides SMS gateway selection.
- Provides payment gateway selection.
- Helps administrators manage communication and payment integrations.

## Conclusion

The **Credentials** section provides a centralized interface for configuring SMTP, SMS, and payment gateway settings in VirtuBox. Correct configuration helps ensure that the application's email, SMS, and payment integrations operate as expected.