

Welcome to The Meridian

*The SorviAI newsletter for people who run a business:
practical habits, what is new in SorviAI and the stories
behind it.*

■ Opening story

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Built inside a business

Why we are writing to you

Most companies begin with one person doing nearly every job: quoting, buying, invoicing, hiring and answering the phone. Growth brings customers, stock and staff faster than it brings structure, and every question lands on the owner's desk.

SorviAI was built inside a business like that. We needed sales, purchases, stock, people and service kept in one place, so the answer to a question did not depend on who happened to remember it.

The Meridian shares what we learn along the way: habits that give a company its shape, plain guides to the rules a business trades under, and the changes we have made to the apps. It reaches you once or twice a month.

Anything we describe in SorviAI is something you can open in your workspace today. While a feature is still being built, we leave it out until it ships.

Structure before scale

What happens when every decision waits for you?

A business that runs through its owner grows only as fast as that owner can answer. Holidays become risky, good people wait for permission and every hire feels like a gamble. Structure is how a company hands work over and keeps it done well.

“I knew how to run the business myself. I needed a way to build a company that could run without everything depending on me.”

Deepak Gupta, Founder, SorviAI

START HERE

List the jobs only you can do today. Beside each, write who could take it on with the right access, a short checklist and someone to approve the result. That list is your first organisation chart.

IN SORVIAI

Roles decide what each person can see and do, app by app, so a new starter gets the access the job needs. Every change to a record is kept in its Audit Trail, with who made it and when.

SIGNS IT IS TIME

- The same question reaches you more than once a day.
- Work stops when you are in a meeting or on leave.
- Only you know where a customer's order stands.



What it means for you

- Name an owner for every recurring job, from paying suppliers to booking in repairs.
- Give each role the access its work needs, and review it when people change jobs.
- Write each checklist once, then let the person who owns the job improve it.
- Hand over one decision a month, starting with the one you make most often.

The test of structure: the business has a good week while you are away.



Know your cash, every week

How much money is really in the business?

Profit on paper and money in the bank are different numbers. A busy, profitable business can still run short, because customers pay late, stock waits on shelves and bills keep their own calendar.

START HERE

Keep thirty minutes at the same time each week for three questions. What do customers owe you, and how late is it? What do you owe suppliers this month? How much stock have you paid for and not yet sold?

KEEP A RECORD

Write the three answers in the same place every week. After a month you will see which way each one is moving, which tells you more than any single balance.

SET A CASH FLOOR

Decide the least cash the business should hold, such as a month of wages and rent. A week that ends below it is your early warning.

IN SORVIAI

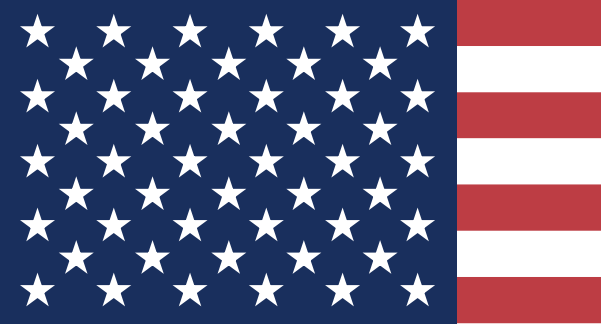
Finance keeps quotations, invoices, bills and payments together, and Inventory holds the stock they refer to, so the weekly check reads from one set of records.

What it means for you

- Chase an invoice the week it falls due, while the work is fresh in your customer's mind.
- Agree payment terms before work starts, and print them on every quote.
- Treat slow stock as cash on a shelf, and decide what to do with it.

SIGNS CASH IS GETTING TIGHT

- You pay one supplier late to pay another on time.
- One customer owes more than a month of your sales.
- Stock grows faster than the sales it is bought for.



New in SorviAI

An introduction to sales tax in the United States

The United States has no national sales tax. Each state sets its own, counties, cities and districts can add theirs, and a business collects it in the states where it is registered. Unlike VAT it is charged once, to the final buyer, so tax paid to a supplier is not claimed back.

IN FINANCE

A workspace set up for the US. Choose United States at signup: books in dollars, month-first dates, a Sales Tax Payable account, checks and ACH among the ways to be paid, and a State and ZIP code on your address.

Rates by state and level. Add the rates of the states you collect in. Each names its state and its level (state, county, city or district), and they are listed state by state.

Groups that share their parts. Build “Austin, TX 8.25%” from its three rates. Texas state tax is one rate in every Texas group, so a change to it is made once.

Sales Tax Liability. A report of what you sold and the tax you charged, state by state and by jurisdiction within each, with one row for untaxed sales.

No VAT fields. A US workspace is not asked for a VAT number, a tax treatment or HMRC filing.

IN INVENTORY

Sales tax on a bill is part of what you bought. It is posted to the line’s own account and counted in the stock’s unit cost, FIFO or weighted average, so stock values and margins carry the full price paid.

A sale in Austin, Texas

Texas state tax	6.25%
Austin city tax	1.00%
Capital Metro transit district	1.00%

Charged on the sale 8.25%

Five states have no statewide sales tax: Alaska, Delaware, Montana, New Hampshire and Oregon.

What you collect is held for the state, and you file a return with each state you collect in.

Rules differ from state to state, so check yours with its tax department.



Weekly Tales by Sowl

What changed in SorviAI this week?

Weekly Tales is our video series on SorviAI, told by Sowl, the owl in round glasses. Each week a short tale shows what has changed in the apps, on the screens where you will use it.

WHAT EACH TALE COVERS

Features: what is new, and where to find it.

Fixes: what we have put right since the last tale.

Updates: changes to how something you use works.

Business tips: habits for running the company.

What it means for you

- Watch the latest episode, with its notes, on What's New.
- Find every episode, from the first, in the series playlist on YouTube.
- Look for the next one each week.

Start on [What's New](#) or open [the playlist](#).

The Meridian, the SorviAI newsletter

Every edition at sorviai.com/newsletters/archives