USER MANUAL

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Office Management System (OMS)

Contents

1 Office Management System(OMS)

An **office management system** is simply the way or method you manage your **office's** documents, information, records etc. That includes everything from dealing with employee issues to financial statements and inventory problems. Most of the problems your **office management system** will deal with will require some degree of documentation.

2 Login

2.1 User Login

2.1.1 Steps

1. Open the **Browser** and enter application **URL** to access the application login page.

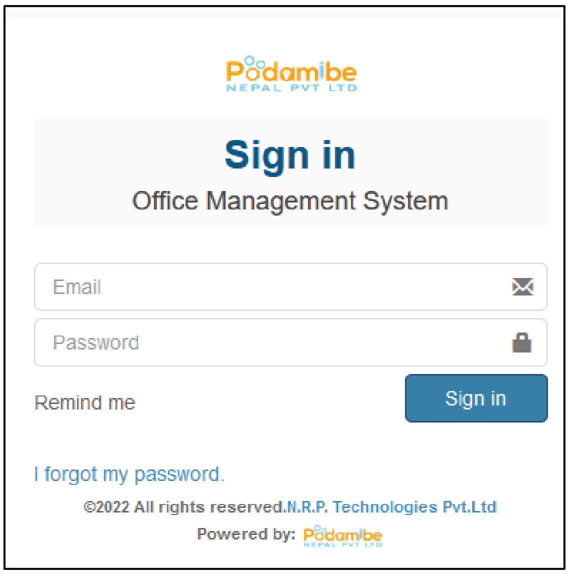


Figure: Login

2. Enter a valid **Email Address** and **Password.**
3. Click on the **Sign in** button.

2.2 Forgot Password

2.2.1 Steps

1. Click **I forgot my password** in the login page. It will open the forgot password page.
2. Enter your **email address** and click the **Reset** button. Check your inbox for an email with a link to the application. Your new password will now be sent to your email address.

2.3 Logout

Click on **Profile>>Exit** to log out of the application.

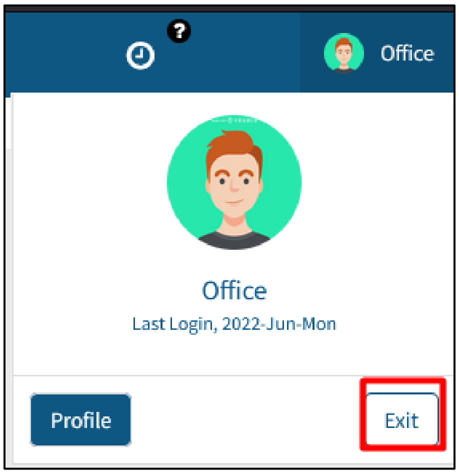


Figure: Logout

3 Dashboard

The **dashboard** depicts the purchase, sales, receipt, and payment as a bar graph. The date is plotted on the horizontal axis, and, each bar's height corresponds to the total purchase, sales, receipt, and payment made on various dates.

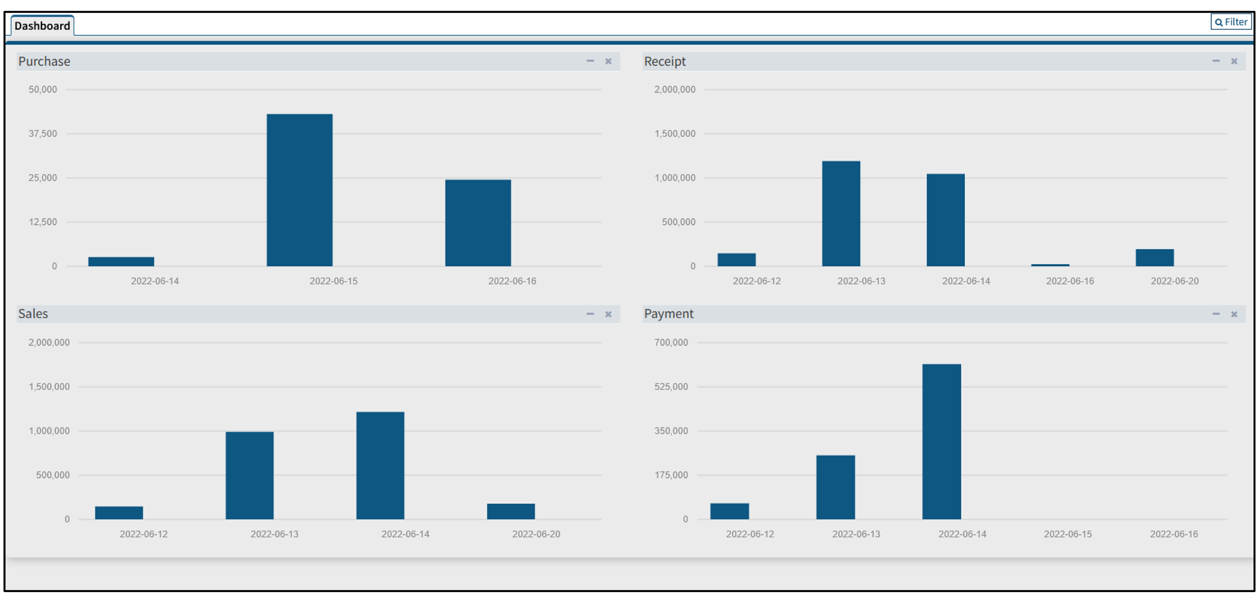


Figure: Dashboard

4 Profile

Profile displays basic information about logged-in user.

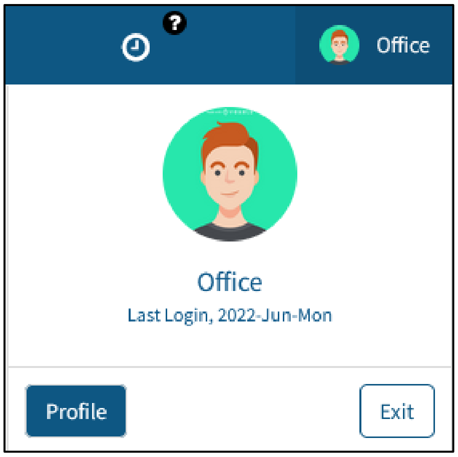


Figure: Profile

By clicking on “**Profile**”, users can view their own profile.

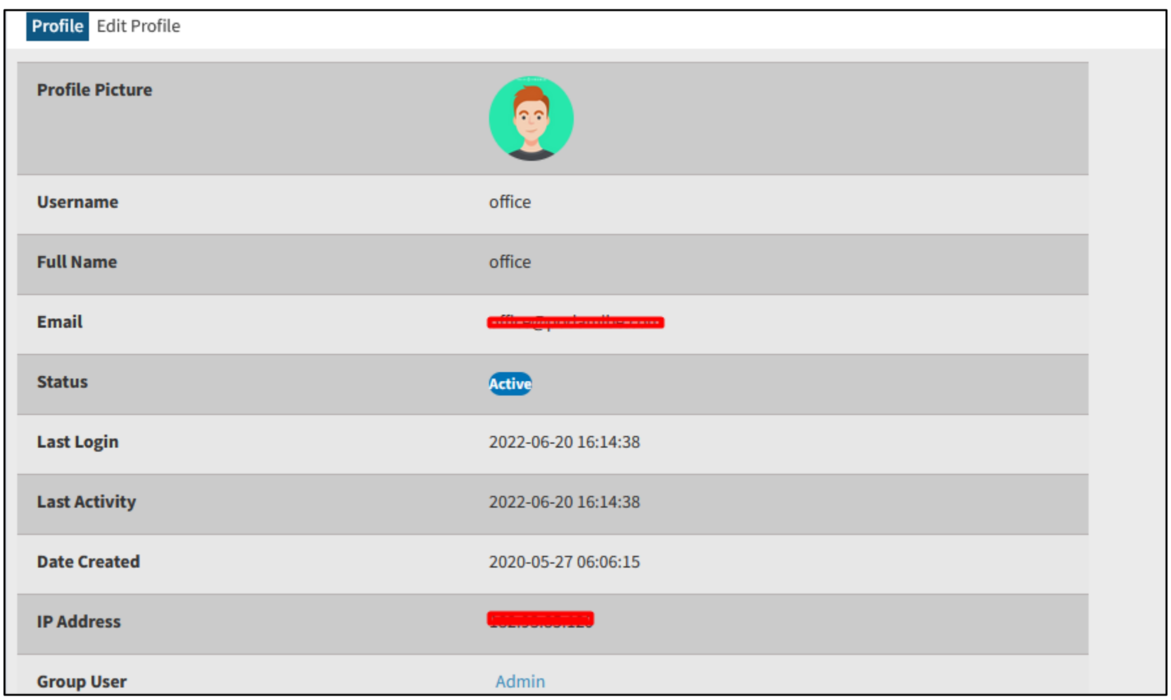


Figure: View Profile

Click on **Edit Profile** in the navbar to update the profile.

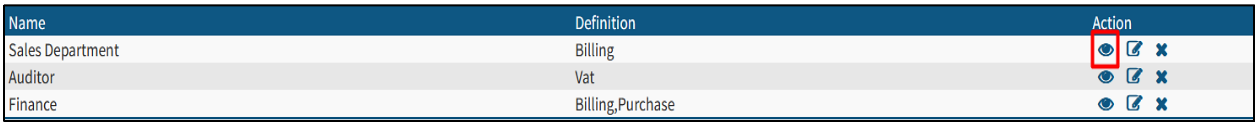
5 Application Generic Behaviors

This section includes guidelines for executing general behaviors/functions of the applications that are found in most of the menus and user interfaces.

Some of the general behaviors found in most of the forms are as listed below:

5.1 View

1. To view the detailed data in the system, click on **View** option. It opens detail in a view mode.

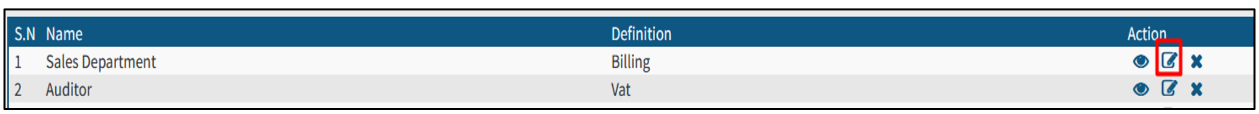


Name	Definition	Action
Sales Department	Billing	
Auditor	Vat	
Finance	Billing,Purchase	

Figure: View Data

5.2 Update

1. To update/edit existing data in the system, click on **Edit** option. It opens detail in an update mode.



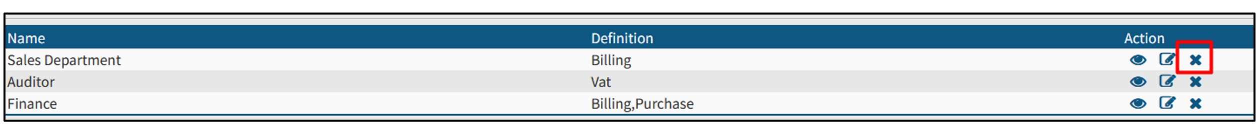
S.N	Name	Definition	Action
1	Sales Department	Billing	
2	Auditor	Vat	

Figure: Update Data

2. Make the necessary edits and save it.

5.3 Delete

1. To remove/delete data from the system permanently, click on **Delete** option.



Name	Definition	Action
Sales Department	Billing	
Auditor	Vat	
Finance	Billing,Purchase	

Figure: Delete Data

2. Upon clicking, the following **Confirmation Pop-up** form is displayed.

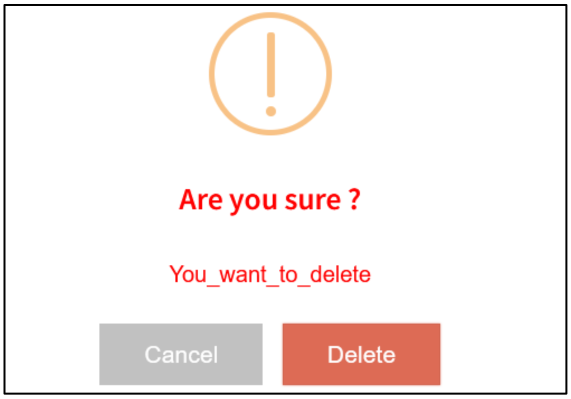


Figure: Confirmation Pop-up Form

3. Click on the **Delete** button to remove the data from the system.

5.4 Save and List

button will save the data and direct the page to the list page.

5.5 Print

button is used to print the document.

5.6 Settings

 button is at the top right of the create page in some of the modules. It is needed if the user wants to change date or other information.

5.7 Arrow

Arrow button  hides the content of the page and vice versa.

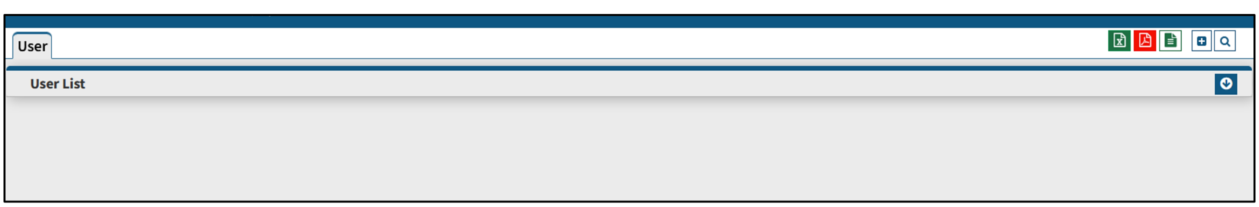


Figure: Arrow Button

5.8 Cancel

1. Upon clicking the 

 in the create or edit page, the following **Confirmation Pop-up** form is displayed.

Figure: Confirmation Pop-up Form

2. Click on the **Yes** button to cancel saving the data in the system.

5.9 Filter

Filter button are usually found in the create and list pages of all the modules. Filter enables users to find relevant data more quickly and easily. When the user enters data in filters, the server looks for the related data in the search objects and fetches the data.

The user can select the dropdown and enter the data they want to filter and click on the Fetch button.

How to Filter?

Enter the **Filter Criteria** and select the option from the dropdown. Finally, click on the **Fetch** button.

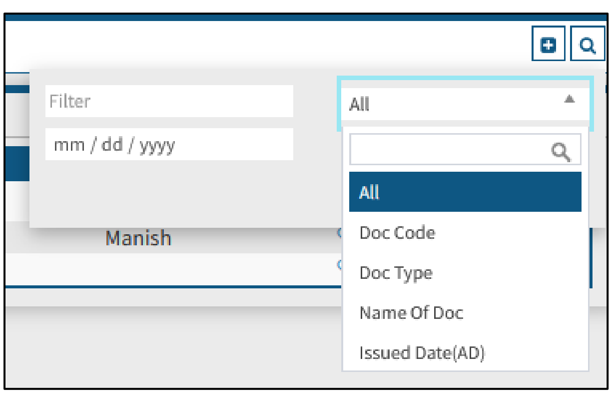


Figure: Filter

User can also select the date range they want to filter and fetch the data.

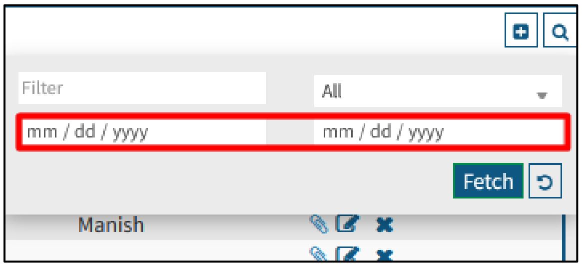


Figure: Date Range Filter

To clear the search click on the  button.

6 User

This menu allows user to add a new user.

6.1 Create User

6.1.1 Steps

1. Open **Auth>>Create User** menu. It opens the following **Add User** page.

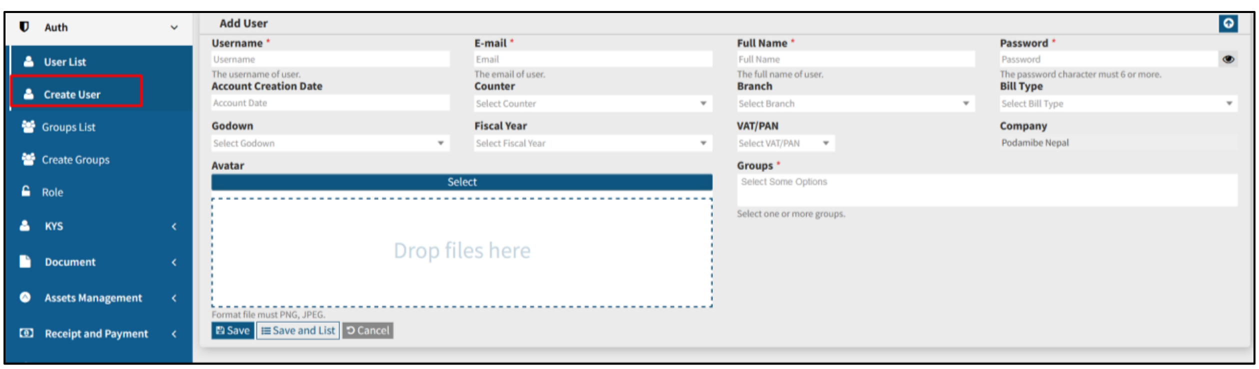


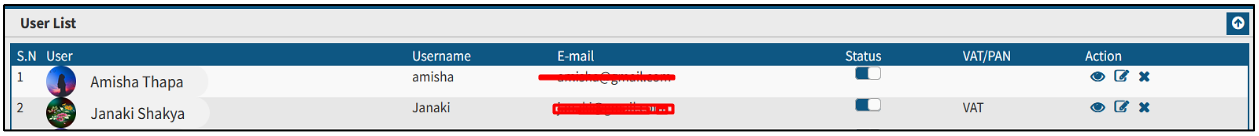
Figure: Add User

2. Enter the required details.
3. Click **Save** or **Save and List** button to save the data.

6.2 User List

6.2.1 Steps

1. Open **Auth>>User List** menu. It opens the following **User List** page.



User List

S.N	User	Username	E-mail	Status	VAT/PAN	Action
1	Amisha Thapa	amisha	[redacted]			
2	Janaki Shakya	Janaki	[redacted]		VAT	

Figure: User List

The saved data will be listed in **User List.**

7 Groups

This menu is used to add new group in the system.

7.1 Add Groups

7.1.1 Steps

1. Open **Auth>>Create Groups** menu. It opens the following **Add Groups** page.

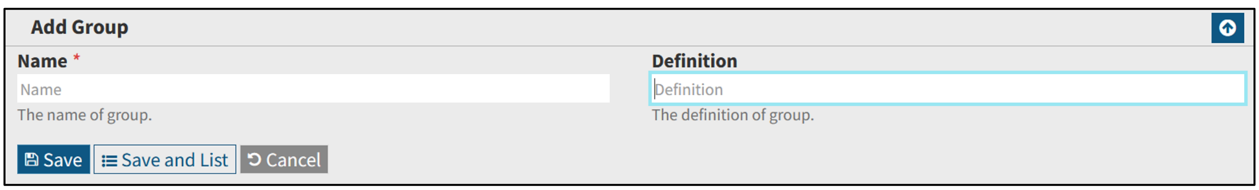


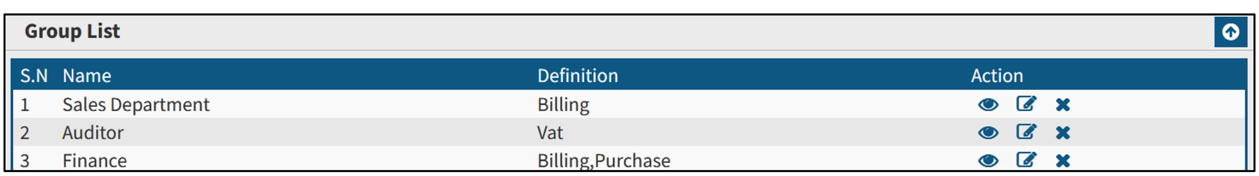
Figure: Add Group

2. Enter necessary details and click **Save** or **Save and List** button to save the data.

7.2 Groups List

7.2.1 Steps

1. Open **Auth>>Groups List** menu. It opens the following **Groups List** page.



Group List

S.N	Name	Definition	Action
1	Sales Department	Billing	
2	Auditor	Vat	
3	Finance	Billing,Purchase	

Figure: Group List

The saved data will be listed in **Group** List.

8 Role

This menu is used to add new role in the system. Admin has almost all the privileges. This module allows admin user to assign add, list, view, edit, check, approve and delete privileges to different users in the system. Only the users with the given privilege can add, list, view, edit, check, approve and delete the particular menu.

8.1 Create Role

8.1.1 Steps

1. Open **Auth>>Create Role** menu. It opens the following **Role** page.

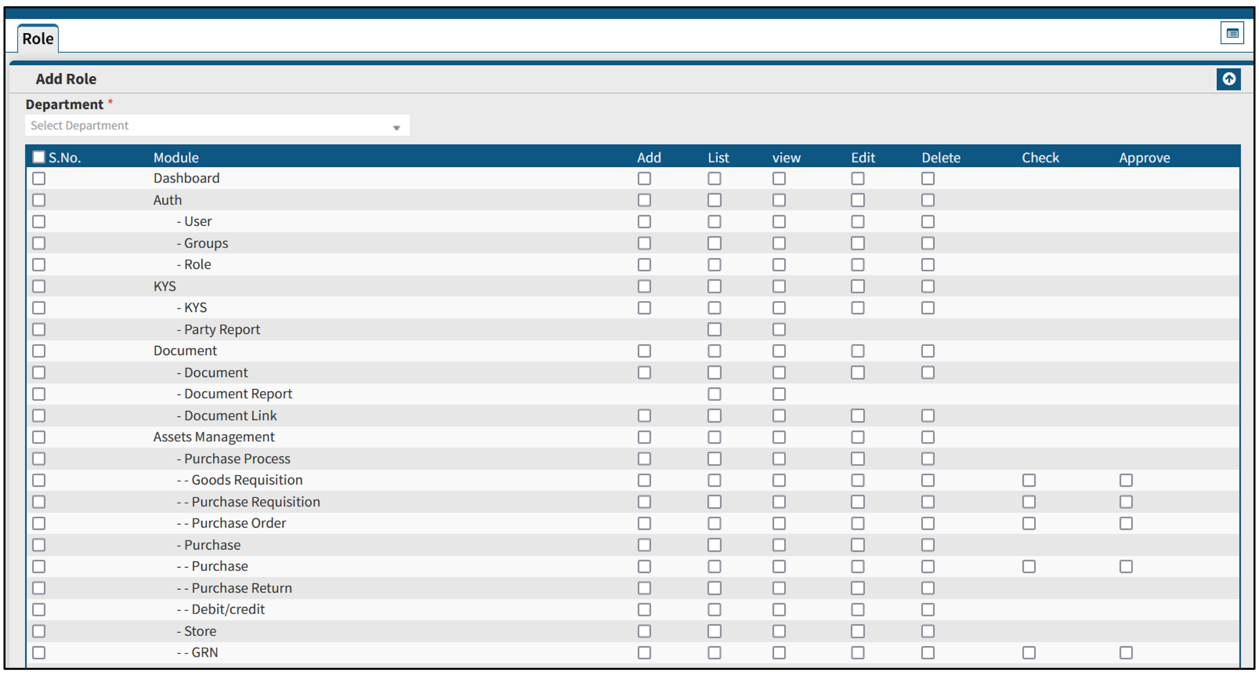


Figure: Add Role

2. First select the **Department**. **(*Note: To select the department, groups must be created.*)**
3. Now, select the required privileges (add, list, view, edit, check, approve and delete) and click on **Save** button to provide selected privileges to the users.

Note: If add and view checkbox are checked then only the add and view privileges are assigned to user. Similarly, user cannot have any access on remaining modules.

How to assign a role to the user?

1. First Create **Groups**.

2. After group is created, create a **Role**. Select the department and required privileges. ***(Note: To select the department, groups must be created as department is groups.)***
3. Now, create a **User** and assign the **Groups** to the user.

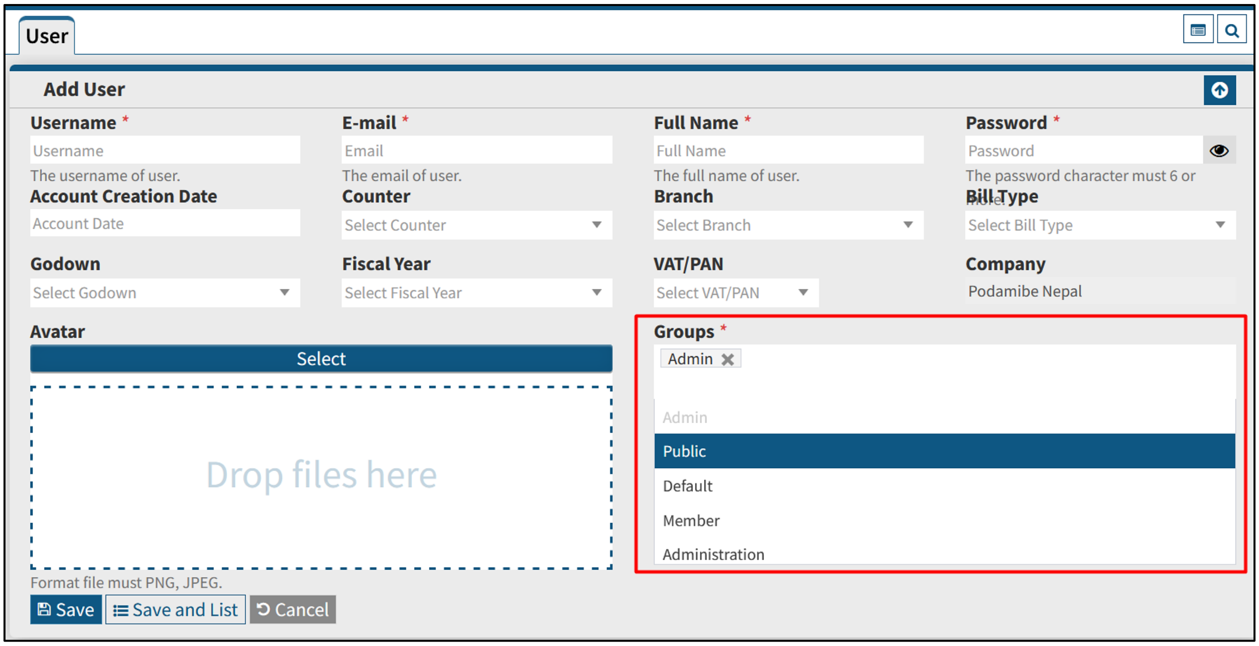


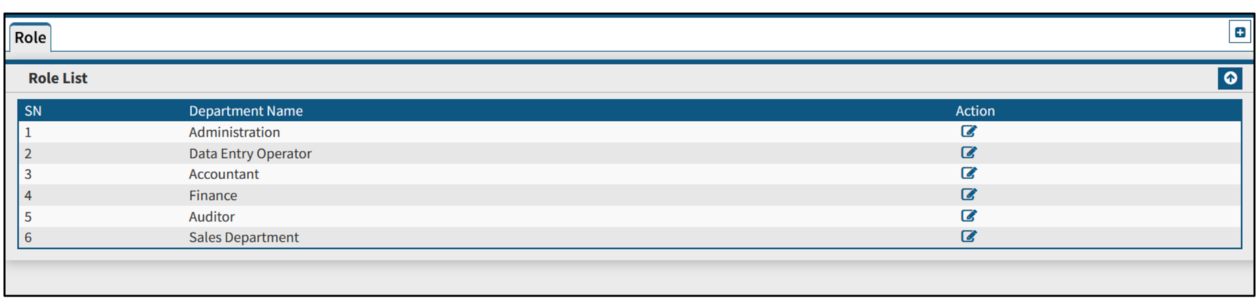
Figure: Assign Role

4. Now the user can login using their respective email address and password.

8.2 Role List

8.2.1 Steps

1. Open **Auth>>Role List** menu. It opens the following **Role List** page.


Role

Role List

SN	Department Name	Action
1	Administration	
2	Data Entry Operator	
3	Accountant	
4	Finance	
5	Auditor	
6	Sales Department	

Figure: Group List

The saved data will be listed in **Role** List.

9 Setup

Basic setup needed for the overall system are set from here.

9.1 KYS

9.1.1 Country

9.1.1.1 Steps

To change the Country setup, follow the below steps:

1. Open **Setup>>KYS>>Country** menu. It opens the following page.

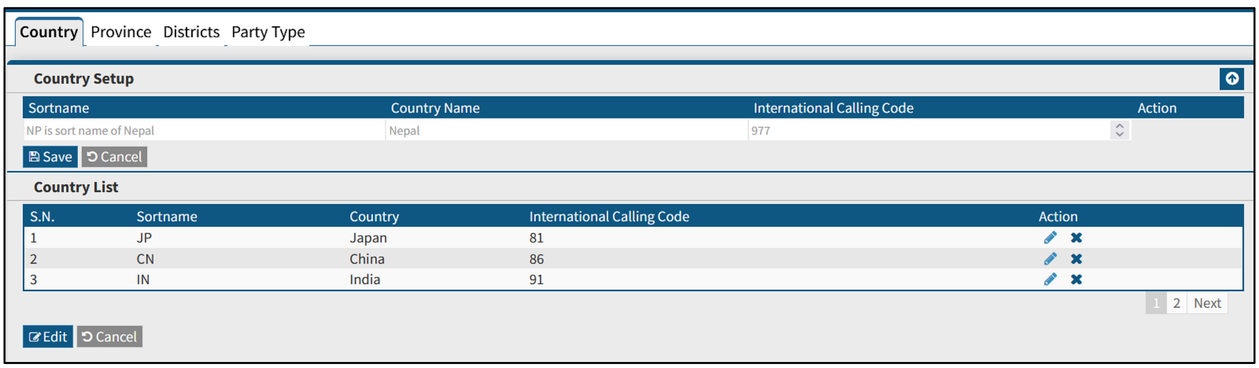


Figure: Country Setup

2. To add new country, enter necessary details and click on the **Save** button. Once the data is added, it appears on **Country List** as shown in the figure.
3. To update the data, click the button in the Action column, make the necessary changes, and then click the Edit button below the table to save the changes.
4. If an update is not needed after you click on the button, then click on the Cancel button and click Yes.

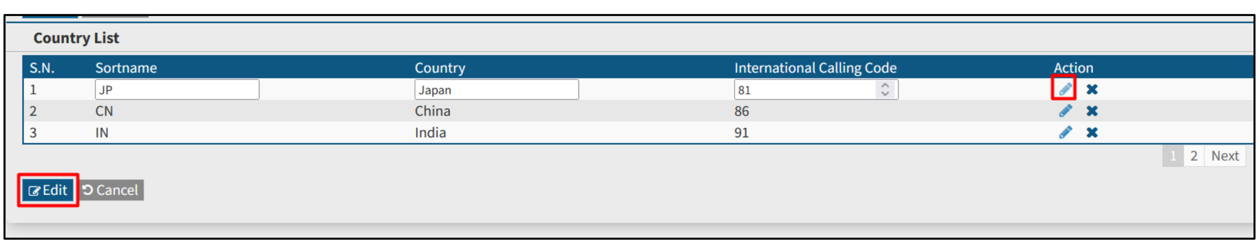


Figure: Country Edit

9.1.2 Province

9.1.2.1 Steps

To change the Province setup, follow the below steps:

1. Open **Setup>>KYS>>Province** menu. It opens the following page.

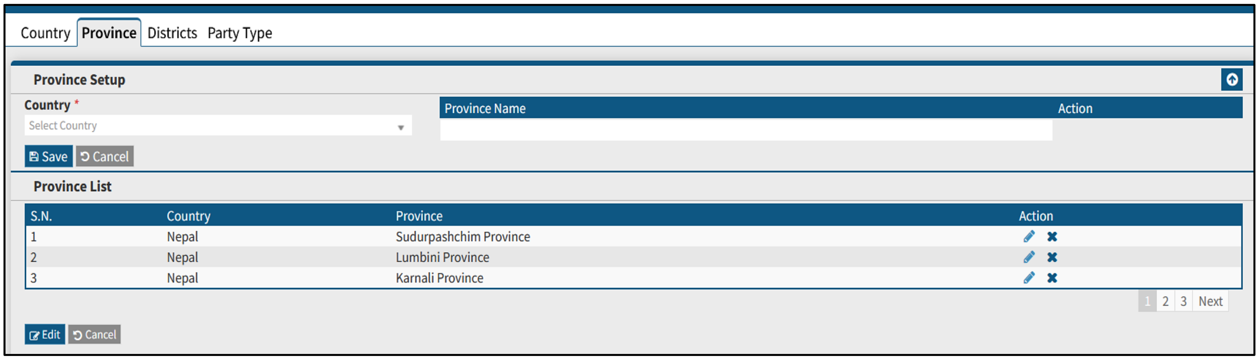


Figure: Province Setup

2. To add new province, enter necessary details and click on the **Save** button. Once the data is added, it appears on **Province List** as shown in the figure.
3. To update the data, click the button in the Action column, make the necessary changes, and then click the Edit button below the table to save the changes.
4. If an update is not needed after you click on the button, then click on the Cancel button and click Yes.

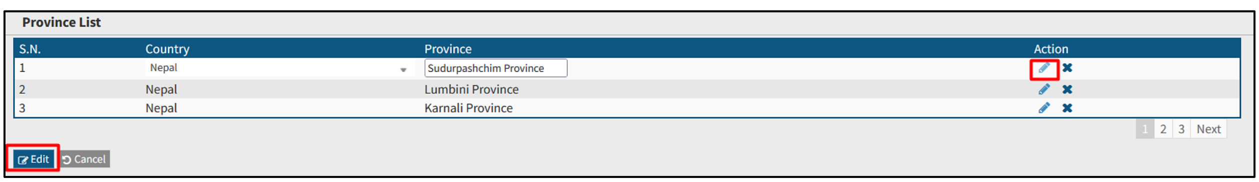


Figure: Province Edit

9.1.3 Districts

9.1.3.1 Steps

To change the Districts setup, follow the below steps:

1. Open **Setup>>KYS>>Districts** menu. It opens the following page.

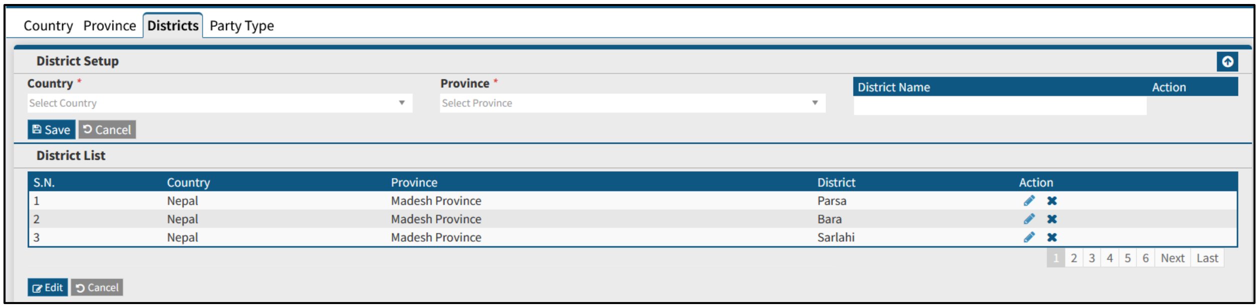


Figure: Districts Setup

2. To add new districts, enter necessary details and click on the **Save** button. Once the data is added, it appears on **Districts List** as shown in the figure.
3. To update the data, click the button in the Action column, make the necessary changes, and then click the Edit button below the table to save the changes
4. If an update is not needed after you click on the button, then click on the Cancel button and click Yes..

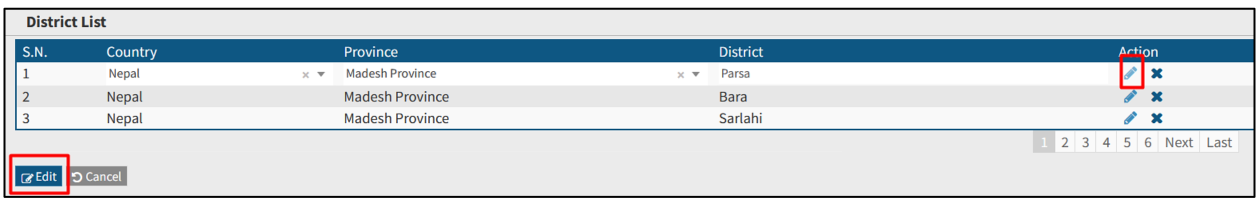


Figure: Districts Edit

9.1.4 Party Type

9.1.4.1 Steps

To change the Party Type setup, follow the below steps:

1. Open **Setup>>KYS>>Party Type** menu. It opens the following page.

Figure: Party Type Setup

2. To add new party type, enter necessary details and click on the **Save** button. Once the data is added, it appears on **Party Type List** as shown in the figure.

3. To update the data, click the button in the Action column, make the necessary changes, and then click the Edit button below the table to save the changes.
4. If an update is not needed after you click on the button, then click on the Cancel button and click Yes.

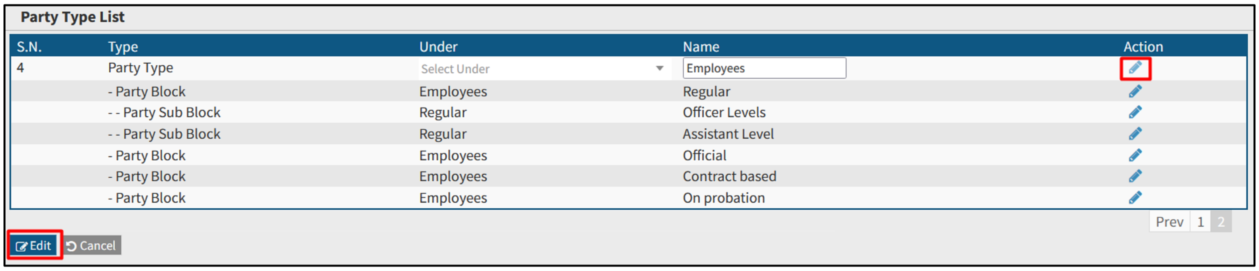


Figure: Party Type Edit

9.2 Document

9.2.1 Document Type

9.2.1.1 Steps

To change the Document Type setup, follow the below steps:

1. Open **Setup>>Document>>Document Type** menu. It opens the following page.

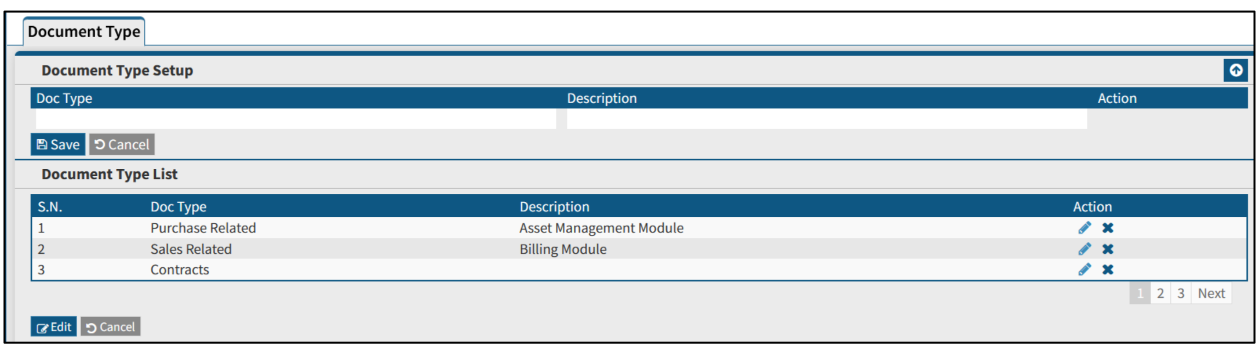


Figure: Document Type Setup

2. To add new document type, enter necessary details and click on the **Save** button. Once the data is added, it appears on **Document Type List** as shown in the figure.
3. To update the data, click the button in the Action column, make the necessary changes, and then click the Edit button below the table to save the changes.
4. If an update is not needed after you click on the button, then click on the Cancel button and click Yes.

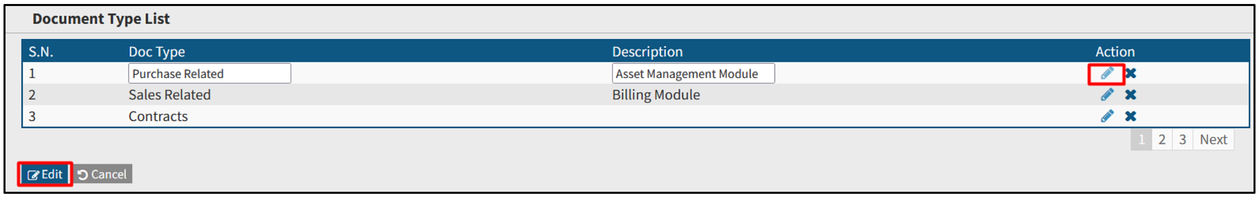


Figure: Document Type Edit

9.3 Asset Management

9.3.1 Items Detail

9.3.1.1 Steps

To change the Items Detail setup, follow the below steps:

1. Open **Setup>>Asset Management>>Items Detail** menu. It opens the following page.

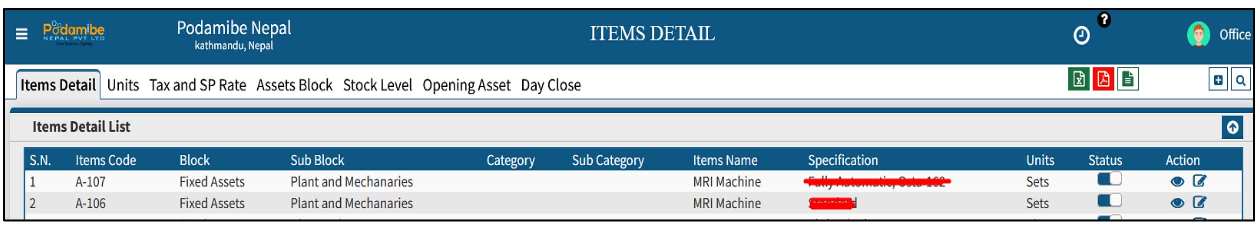


Figure: Items Detail Setup

2. Click the  button in the navbar to add new items.
3. Upon clicking the create button, it will open the following **Add Items** Page.

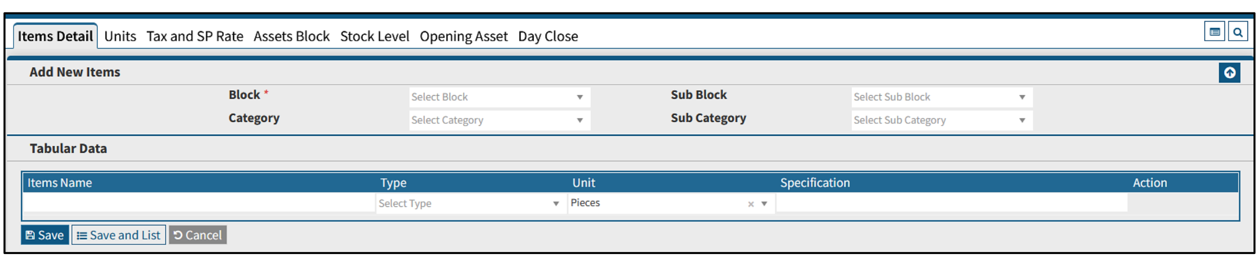


Figure: Add New Items

4. Enter necessary details and click **Save** or **Save and List** button to save the data. Once the data is added, it appears on **Items Detail List**.

9.3.2 Units

9.3.2.1 Steps

To change the Units setup, follow the below steps:

1. Open **Setup>>Asset Management>>Units** menu. It opens the following page.

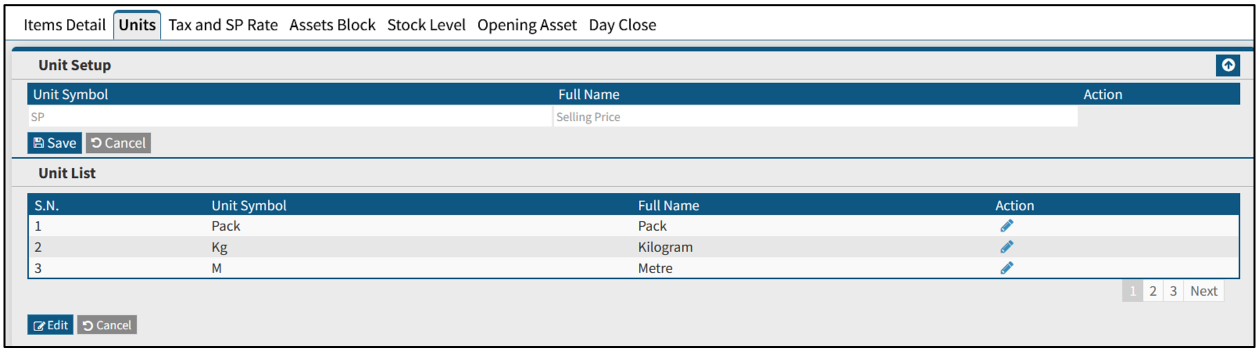


Figure: Units Setup

2. To add new units, enter necessary details and click on the **Save** button. Once the data is added, it appears on **Units List** as shown in the figure.
3. To update the data, click the button in the Action column, make the necessary changes, and then click the Edit button below the table to save the changes.
4. If an update is not needed after you click on the button, then click on the Cancel button and click Yes.

9.3.3 Tax and SP Rate

9.3.3.1 Steps

To change the Tax and SP Rate setup, follow the below steps:

1. Open **Setup>>Asset Management>>Tax and SP Rate** menu. It opens the following page.

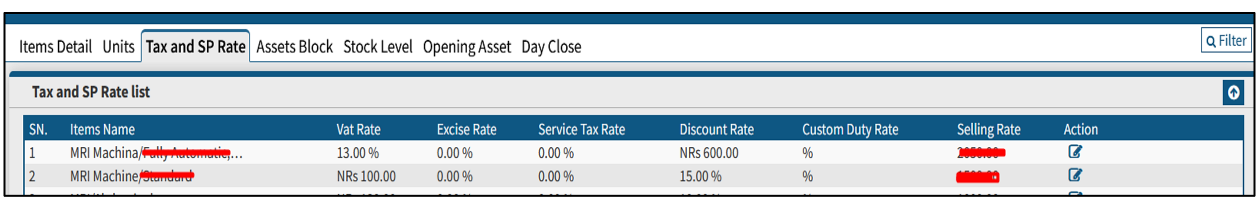


Figure: Tax and SP Rate

2. To update the data, click the Edit button in the Action column, make the necessary changes, and click on the update button. Once the data is updated, it appears on **Tax and SP Rate List** as shown in the figure.

9.3.4 Assets Block

9.3.4.1 Steps

To change the Assets Block setup, follow the below steps:

1. Open **Setup>>Asset Management>>Assets Block** menu. It opens the following page.

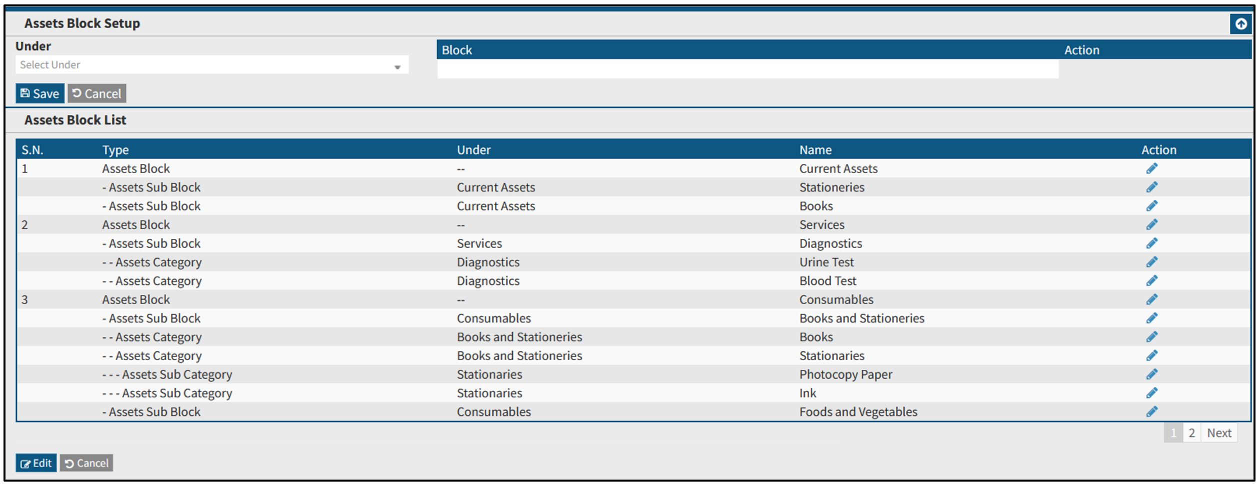


Figure: Assets Block Setup

2. To add new assets block, enter necessary details and click on the **Save** button. Once the data is added, it appears on **Assets Block List** as shown in the figure.
3. To update the data, click the button in the Action column, make the necessary changes, and then click the Edit button below the table to save the changes.
4. If an update is not needed after you click on the button, then click on the Cancel button and click Yes.

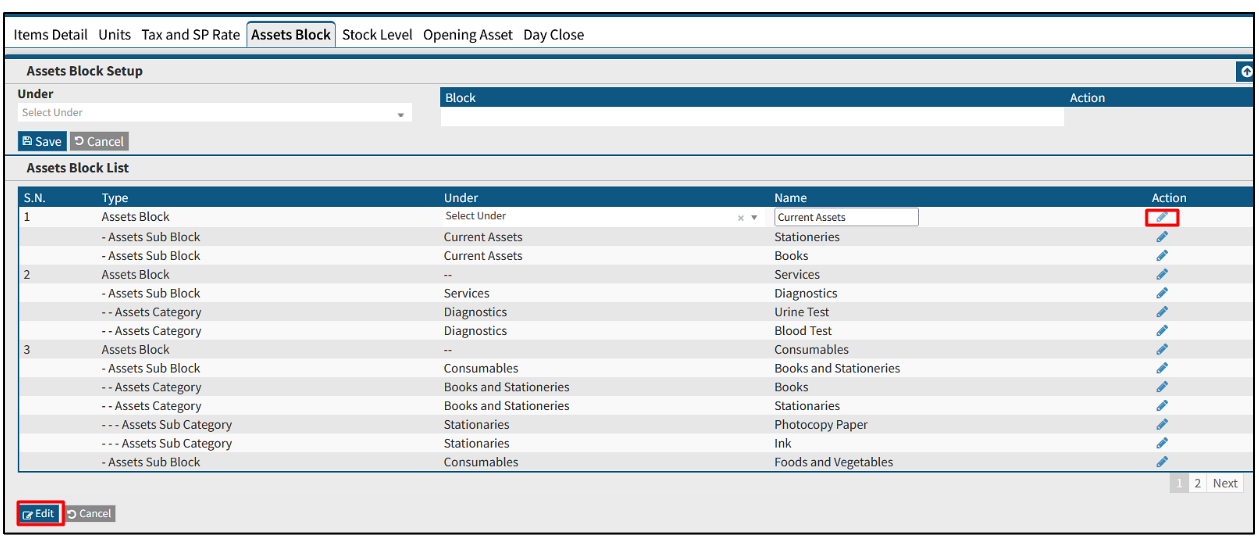


Figure: Assets Block Edit

9.3.5 Stock Level

9.3.5.1 Steps

To change the Stock Level setup, follow the below steps:

1. Open **Setup>>Asset Management>>Stock Level** menu. It opens the following page.

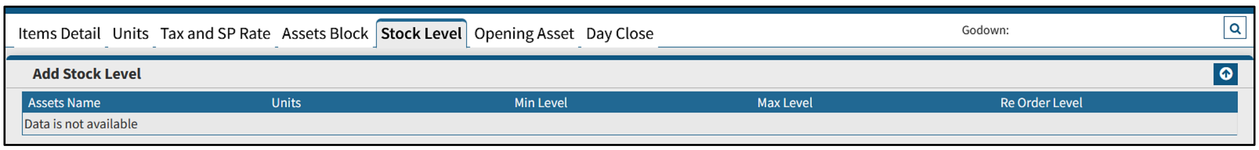


Figure: Stock Level

2. Click filter button in the navbar and select Godown and click on the **Fetch Data** Button.
*Note: Godown is added from **Setup>>Billing>>Godown***

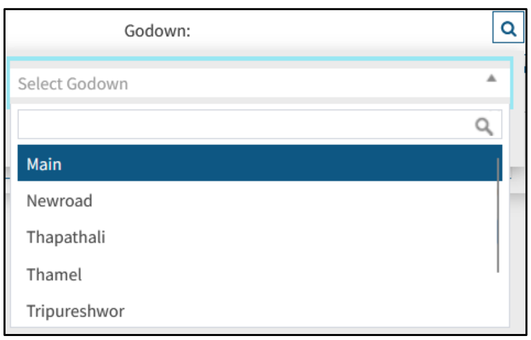


Figure: Select Godown

Upon clicking Fetch Data, the following page will open.

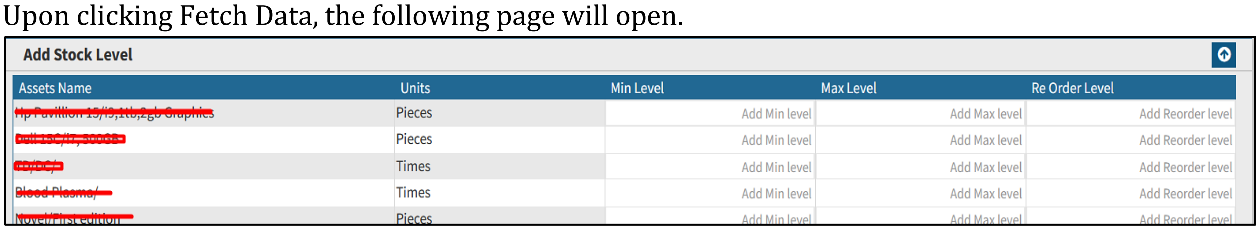


Figure: Add Stock Level

3. Enter **Min Level, Max Level** and **Reorder Level** and click on the **Save** Button.

9.3.6 Opening Asset

9.3.6.1 Steps

To change the Opening Asset setup, follow the below steps:

1. Open **Setup>>Asset Management>>Stock Level** menu. It opens the following page.

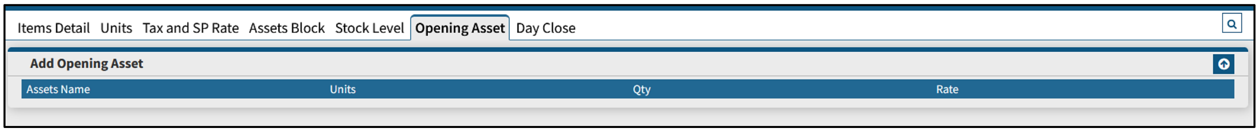


Figure: Opening Asset

2. Click filter button in the navbar and select godown and click on the **Fetch Data** Button.

*Note: Godown is added from **Setup>>Billing>>Godown***

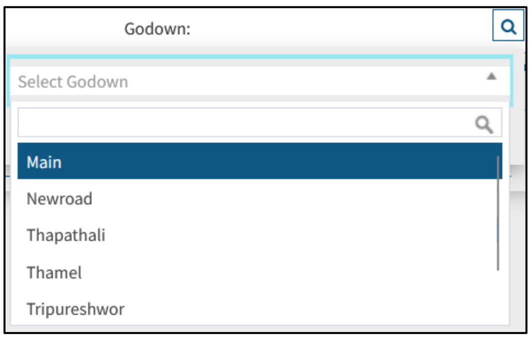


Figure: Select Godown

Upon clicking Fetch Data, the following page will open.

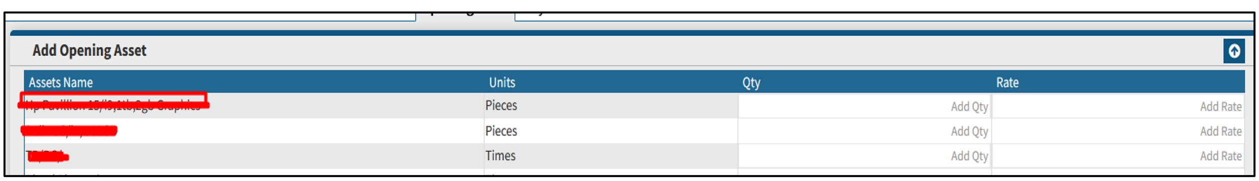


Figure: Add Opening Asset

3. Enter **Quantity** and **Rate** and click on the **Approve** Button.

9.4 Receipt and Payment

9.4.1 Receipt Type

9.4.1.1 Steps

To change the Receipt Type setup, follow the below steps:

1. Open **Setup>>Receipt and Payment>>Receipt Type** menu. It opens the following page.

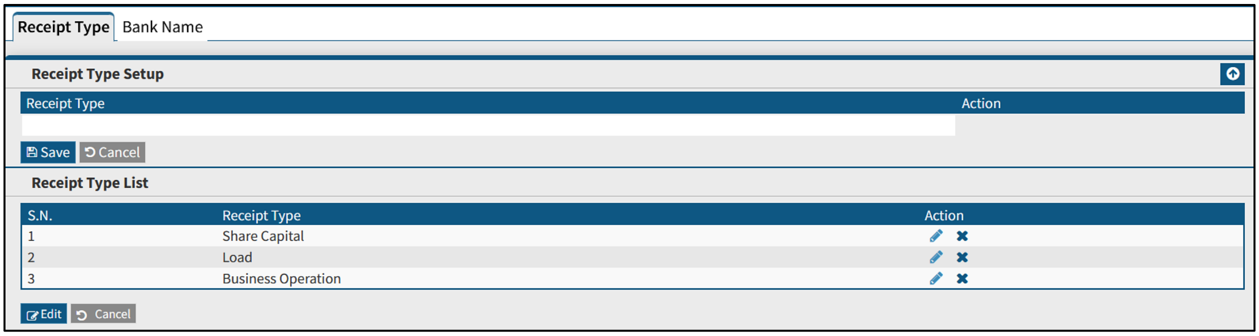


Figure: Receipt Type Setup

2. To add new receipt type, enter necessary details and click on the **Save** button. Once the data is added, it appears on **Receipt Type List** as shown in the figure.
3. To update the data, click the button in the Action column, make the necessary changes, and then click the Edit button below the table to save the changes.
4. If an update is not needed after you click on the button, then click on the Cancel button and click Yes.

9.4.2 Bank Name

9.4.2.1 Steps

To change the Bank Name setup, follow the below steps:

1. Open **Setup>>Receipt and Payment>>Bank Name** menu. It opens the following page.

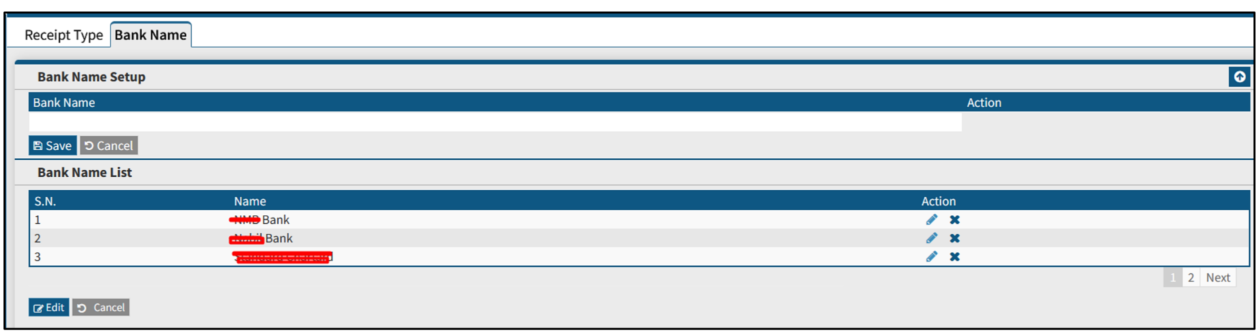


Figure: Bank Name Setup

2. To add new Bank Name, enter necessary details and click on the **Save** button. Once the data is added, it appears on **Bank Name List** as shown in the figure.
3. To update the data, click the button in the Action column, make the necessary changes, and then click the Edit button below the table to save the changes.

4. If an update is not needed after you click on the button, then click on the button and click Yes.

9.5 Billing

9.5.1 Godown

9.5.1.1 Steps

To change the Godown setup, follow the below steps:

1. Open **Setup>>Billing>>Godown** menu. It opens the following page.

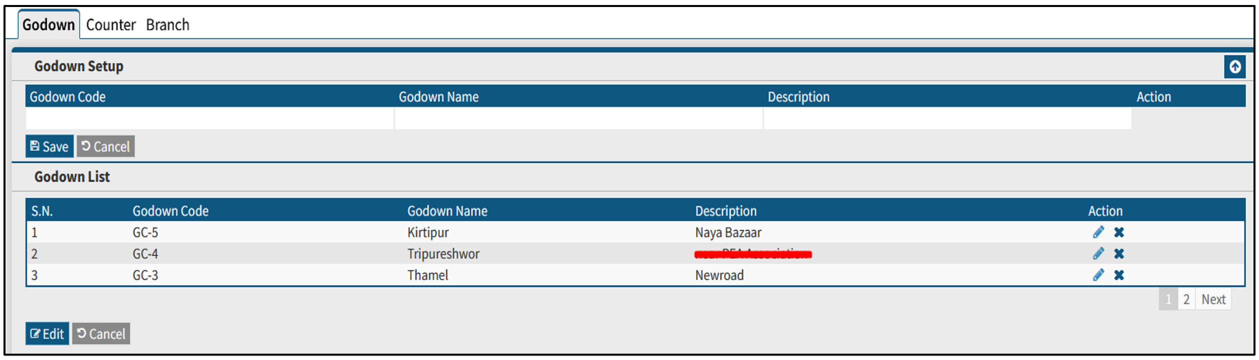


Figure: Godown Setup

2. To add new godown, enter necessary details and click on the **Save** button. Once the data is added, it appears on **Godown List** as shown in the figure.
3. To update the data, click the button in the Action column, make the necessary changes, and then click the button below the table to save the changes.
4. If an update is not needed after you click on the button, then click on the button and click Yes.

9.5.2 Counter

9.5.2.1 Steps

To change the Counter setup, follow the below steps:

1. Open **Setup>>Billing>>Counter** menu. It opens the following page.

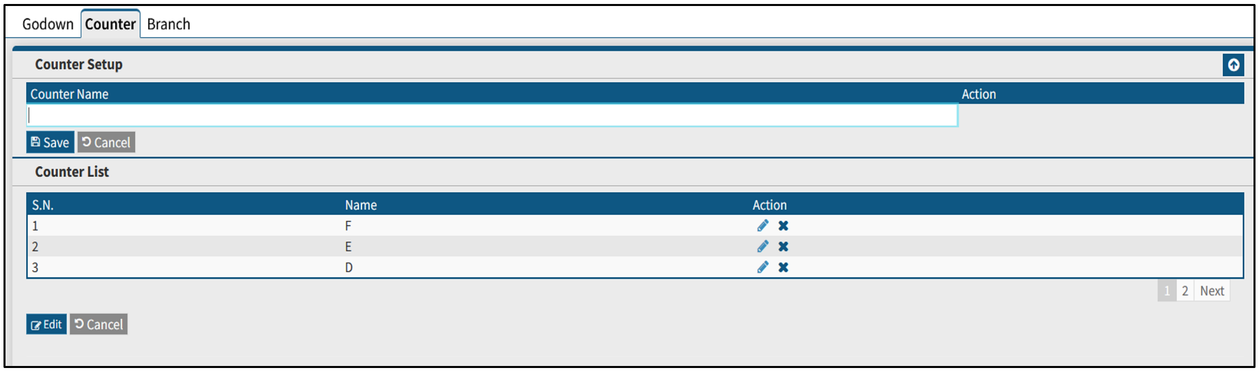


Figure: Counter Setup

2. To add new Counter, enter necessary details and click on the **Save** button. Once the data is added, it appears on **Counter List** as shown in the figure.
3. To update the data, click the button in the Action column, make the necessary changes, and then click the Edit button below the table to save the changes.
4. If an update is not needed after you click on the button, then click on the Cancel button and click Yes.

9.5.3 Branch

9.5.3.1 Steps

To change the Branch setup, follow the below steps:

1. Open **Setup>>Billing>>Branch** menu. It opens the following page.

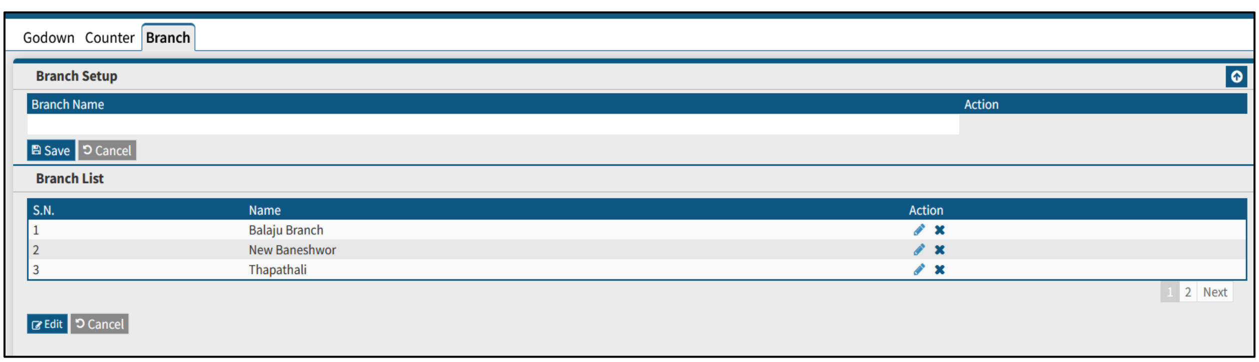


Figure: Branch Setup

2. To add new Branch, enter necessary details and click on the **Save** button. Once the data is added, it appears on **Branch List** as shown in the figure.
3. To update the data, click the button in the Action column, make the necessary changes, and then click the Edit button below the table to save the changes.

4. If an update is not needed after you click on the button, then click on the Cancel button and click Yes.

9.6 Accounting

9.6.1 Fiscal Year

9.6.1.1 Steps

To change the Fiscal Year setup, follow the below steps:

1. Open **Setup>>Accounting>>Fiscal Year** menu. It opens the following page.

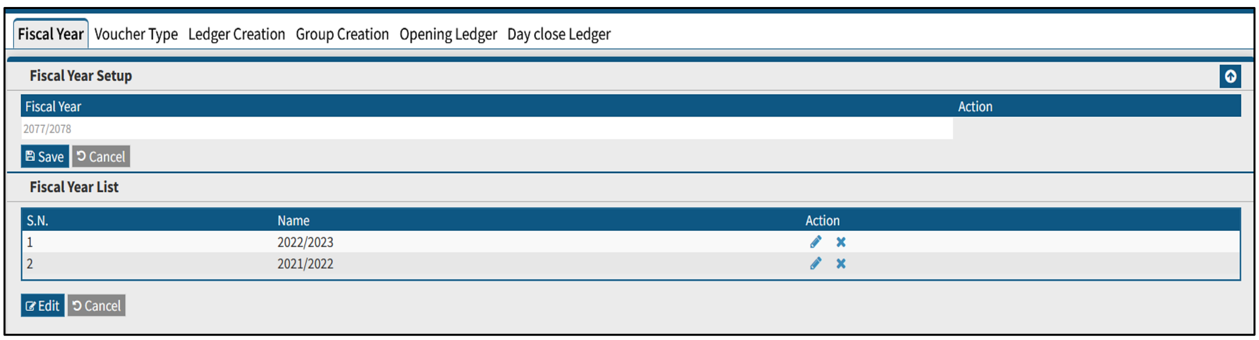


Figure: Fiscal Year Setup

2. To add new Fiscal Year, enter necessary details and click on the **Save** button. Once the data is added, it appears on **Fiscal Year List** as shown in the figure.
3. To update the data, click the button in the Action column, make the necessary changes, and then click the Edit button below the table to save the changes.
4. If an update is not needed after you click on the button, then click on the Cancel button and click Yes.

9.6.2 Voucher Type

9.6.2.1 Steps

To change the Voucher Type setup, follow the below steps:

1. Open **Setup>>Accounting>>Voucher Type** menu. It opens the following page.

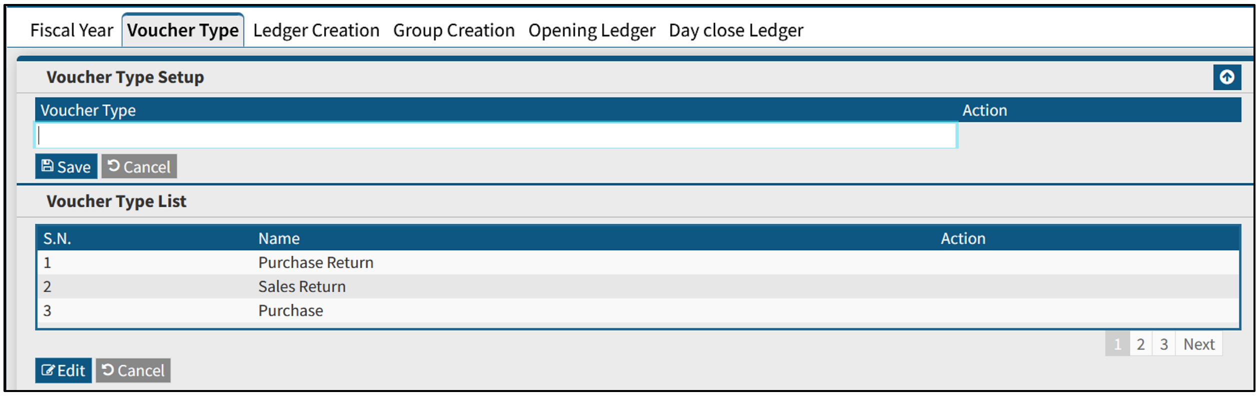


Figure: Voucher Type Setup

2. To add new Voucher Type, enter necessary details and click on the **Save** button. Once the data is added, it appears on **Voucher Type List** as shown in the figure.
3. To update the data, click the button in the Action column, make the necessary changes, and then click the Edit button below the table to save the changes.
4. If an update is not needed after you click on the button, then click on the Cancel button and click Yes.

9.6.3 Ledger Creation

9.6.3.1 Steps

To change the Ledger Creation setup, follow the below steps:

1. Open **Setup>>Accounting>>Ledger Creation** menu. It opens the following page.

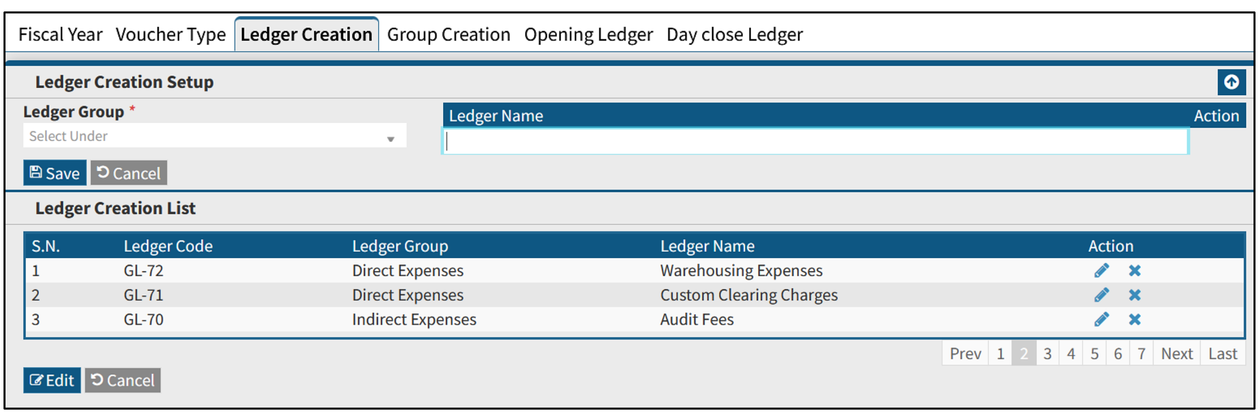


Figure: Ledger Creation Setup

2. To add new Ledger Creation, enter necessary details and click on the **Save** button. Once the data is added, it appears on **Ledger Creation List** as shown in the figure.

3. To update the data, click the button in the Action column, make the necessary changes, and then click the Edit button below the table to save the changes.
4. If an update is not needed after you click on the button, then click on the Cancel button and click Yes.

9.6.4 Group Creation

9.6.4.1 Steps

To change the Group Creation setup, follow the below steps:

1. Open **Setup>>Accounting>>Group Creation** menu. It opens the following page.

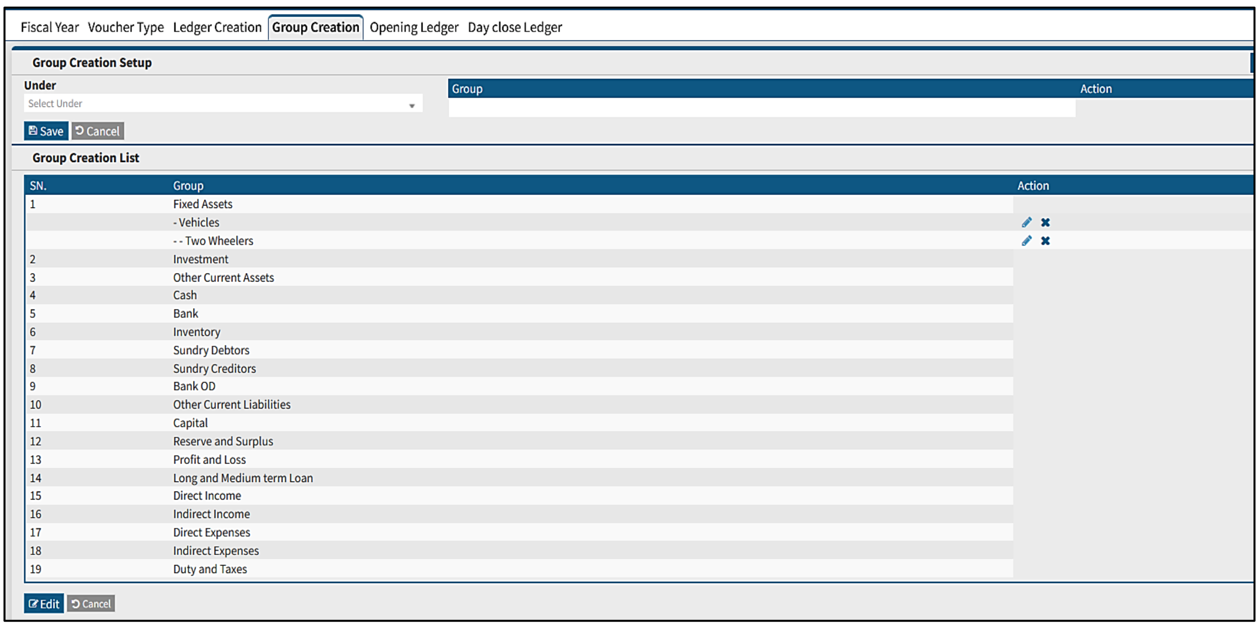


Figure: Group Creation Setup

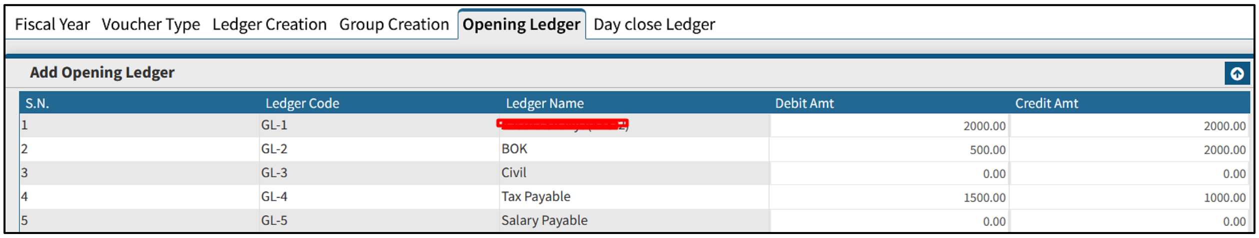
2. To add new Group Creation, enter necessary details and click on the **Save** button. Once the data is added, it appears on **Group Creation List** as shown in the figure.
3. To update the data, click the button in the Action column, make the necessary changes, and then click the Edit button below the table to save the changes.

9.6.5 Opening Ledger

9.6.5.1 Steps

To change the Opening Ledger setup, follow the below steps:

1. Open **Setup>>Accounting>>Opening Ledger** menu. It opens the following page.



S.N.	Ledger Code	Ledger Name	Debit Amt	Credit Amt
1	GL-1	[redacted]	2000.00	2000.00
2	GL-2	BOK	500.00	2000.00
3	GL-3	Civil	0.00	0.00
4	GL-4	Tax Payable	1500.00	1000.00
5	GL-5	Salary Payable	0.00	0.00

Figure: Add Opening Ledger

2. To add Opening Ledger, enter **Debit Amount** and **Credit Amount** and click on the Approve button.

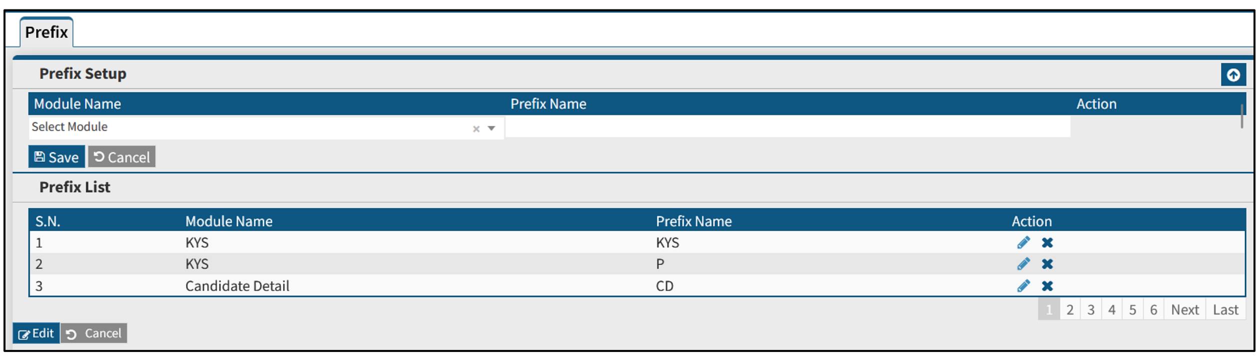
9.7 Setting

9.7.1 Prefix

9.7.1.1 Steps

To change the Prefix setup, follow the below steps:

1. Open **Setup>>Setting>>Prefix** menu. It opens the following page.



S.N.	Module Name	Prefix Name	Action
1	KYS	KYS	
2	KYS	P	
3	Candidate Detail	CD	

Figure: Prefix Setup

2. To add new Prefix, enter necessary details and click on the **Save** button. Once the data is added, it appears on **Prefix List** as shown in the figure.
3. To update the data, click the button in the Action column, make the necessary changes, and then click the Edit button below the table to save the changes.

9.7.2 Status

9.7.2.1 Steps

To change the Status setup, follow the below steps:

1. Open **Setup>>Setting>>Status** menu. It opens the following page.

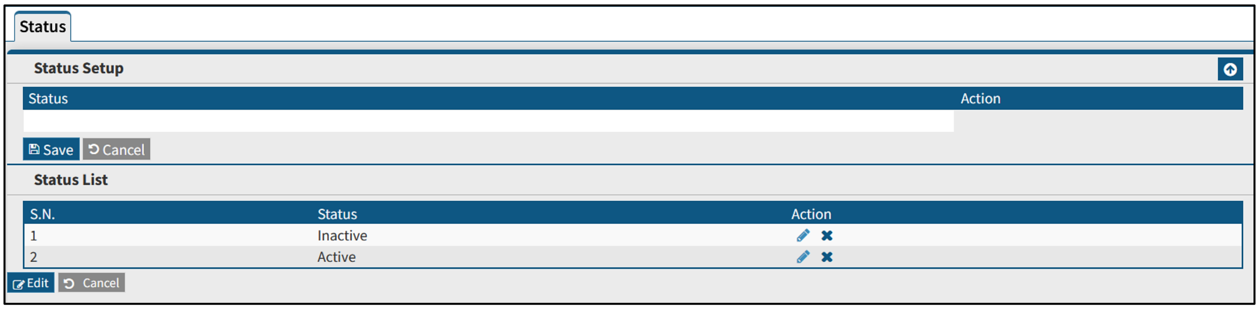


Figure: Status Setup

2. To add new Status, enter necessary details and click on the **Save** button. Once the data is added, it appears on **Status List** as shown in the figure.
3. To update the data, click the button in the Action column, make the necessary changes, and then click the Edit button below the table to save the changes.

Note: This setting is specifically used by the admin.

10 Modules

Modules are organized under different groups that appear on the left sidebar menu.

10.1 KYS (Know Your Stakeholders)

KYS includes general as well as detailed information about different kinds of users. Users can also be different types of parties. The party can be employees, shareholders, suppliers, students, etc.

10.1.1 Create KYS

Follow the below steps to create KYS:

1. Open **KYS>>Create KYS** menu. It opens the following **Add New KYS** page.

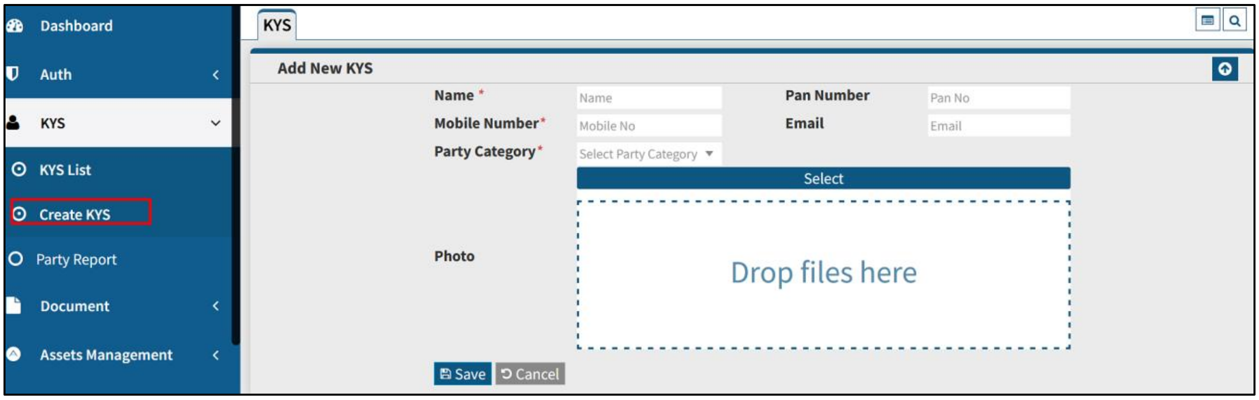


Figure: Add New KYS

2. Enter the necessary details such as **Name, Pan Number, Party Category, Mobile Number,** etc., if required.
3. Click **Save** button to save the data.
4. Once the data is saved, the page will be redirected to the **General** Page.

Note: The General, Address, Legal Document, Official Contact, Parties Document, Key Persons, Nominee, Party Class and Involvement can be opened by clicking button in the KYS list page.

10.1.1.1 General

All the data added during the creation process can be updated here.

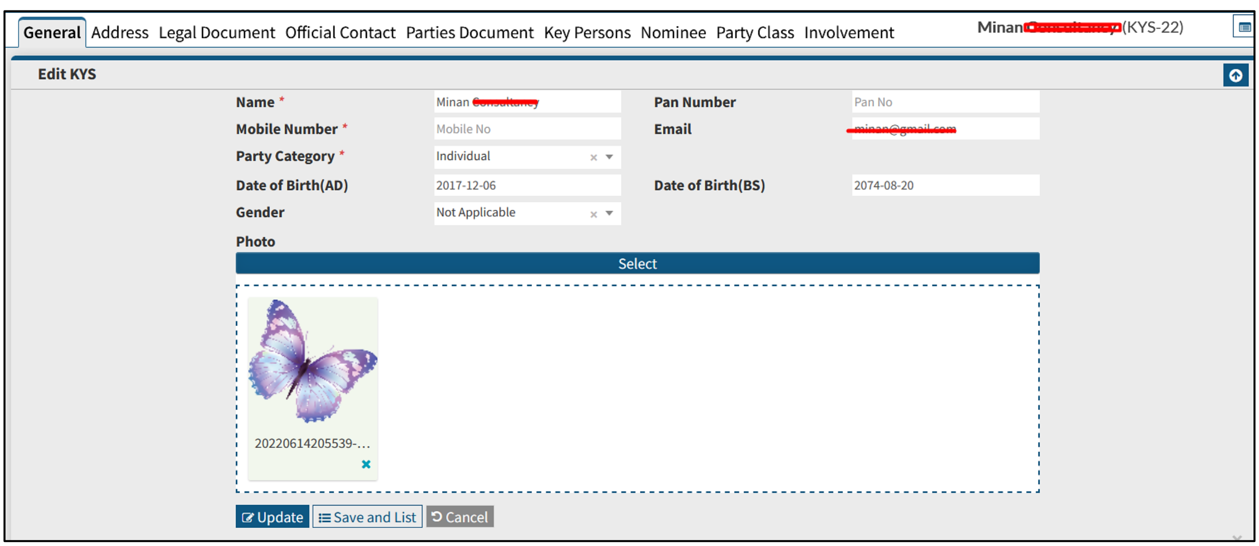


Figure: Edit General Information

10.1.1.2 Address

This includes permanent as well as temporary addresses of the users.

To add address, follow the below steps:

1. Open **KYS>>KYS List>>edit>>Address** menu. It opens the following page.

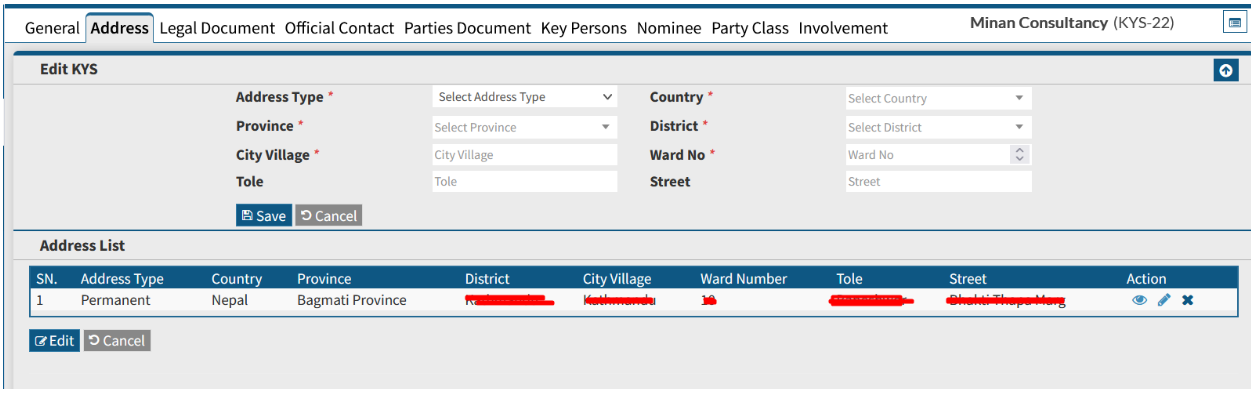


Figure: Add Address

2. To add Address, enter necessary details and click on the **Save** button. Once the data is added, it appears on **Address List** as shown in the figure.
3. To update the data, click the button in the Action column, make the necessary changes, and then click the Edit button below the table to save the changes.
4. If an update is not needed after you click on the button, then click on the Cancel button and click Yes.

10.1.1.3 Legal Document

Various types of documents attachment can be found here. A document can be a passport, citizenship, license, company documents, business paperwork, purchase reports, sales reports or general documents. Documents can be about any subject.

To add legal document, follow the below steps:

1. Open **KYS>>KYS List>>edit>>Legal Document** menu. It opens the following page.

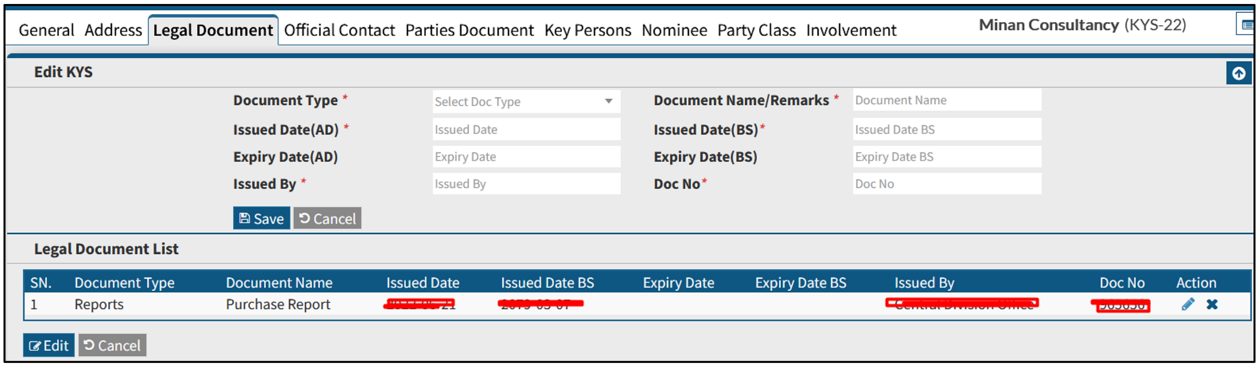


Figure: Add Legal Document

2. To add Legal Document, enter necessary details and click on the **Save** button. Once the data is added, it appears on **Legal Document List** as shown in the figure.
3. To update the data, click the button in the Action column, make the necessary changes, and then click the Edit button below the table to save the changes.
4. If an update is not needed after you click on the button, then click on the Cancel button and click Yes.

10.1.1.4 Official Contact

This section contains the users' official contact information. Contact may include a mobile number, fax, website, email, etc.

To add official contact, follow the below steps:

1. Open **KYS>>KYS List>>edit>>Official Contact** menu. It opens the following page.

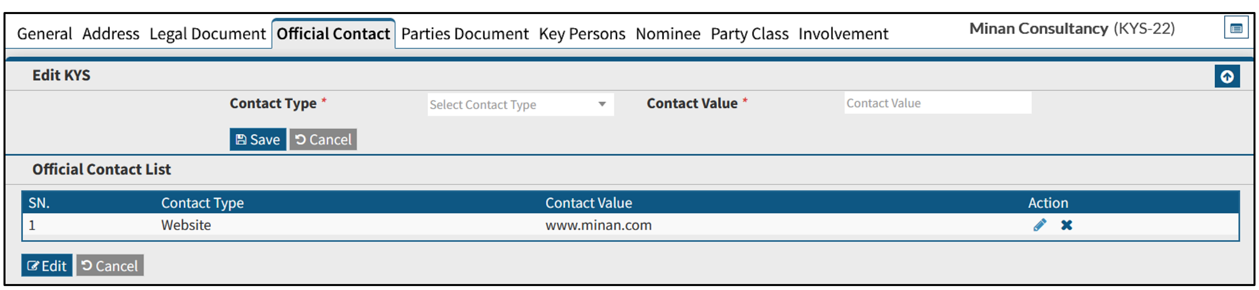


Figure: Add Legal Document

2. To add Official Contact, enter **Contact Type** and **Contact Value** and click on the **Save** button. Once the data is added, it appears on **Official Contact List** as shown in the figure.
3. To update the data, click the button in the Action column, make the necessary changes, and then click the Edit button below the table to save the changes.

4. If an update is not needed after you click on the button, then click on the Cancel button and click Yes.

10.1.1.5 Parties Document

This includes document links for the parties.

To add parties document, follow the below steps:

1. Open **KYS>>KYS List>>edit>>Parties Document** menu. It opens the following page.

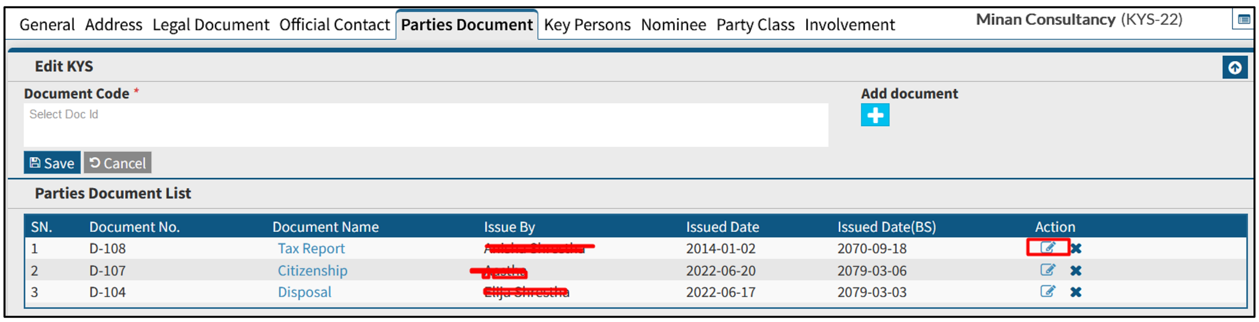


Figure: Add Parties Document

2. To add Parties Document, select the **Document Code** from the dropdown and click on the **Save** button. Once the data is added, it appears on **Parties Document List** as shown in the figure.

3. To Add New Document click on button next to the Document code field, the following popup will appear.

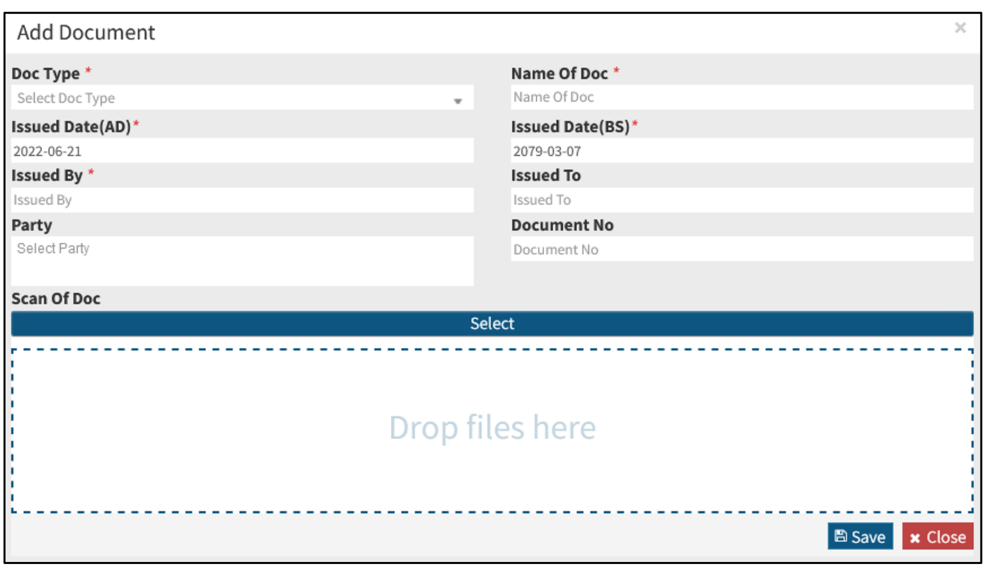


Figure: Add Document

Enter necessary fields and click on the save button. Once the data is added, it appears on **Parties Document List**.

4. To update the data, click the button in the Action column, following popup will appear.

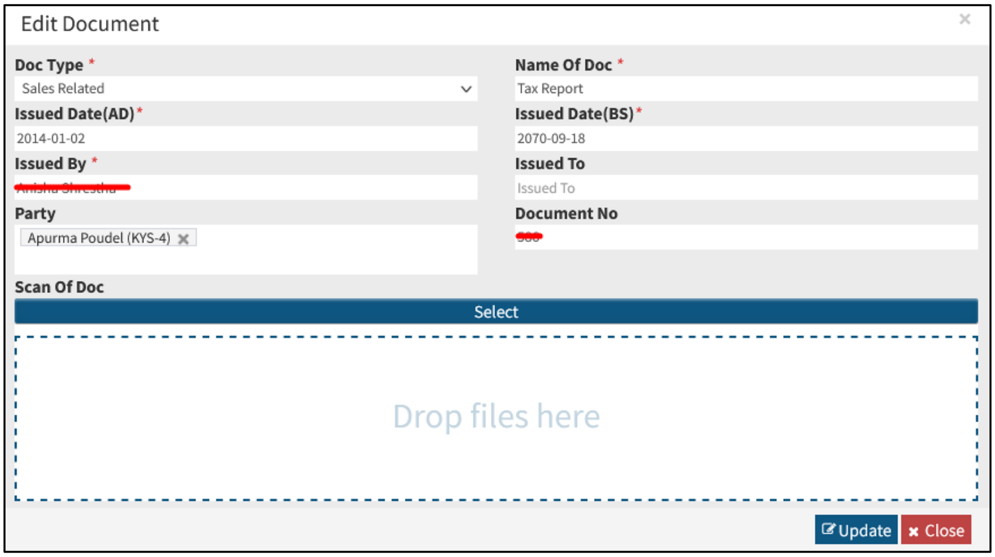


Figure: Edit Document

Here, make necessary edits and click on the update button.

10.1.1.6 Key Persons

To add key persons, follow the below steps:

1. Open **KYS>>KYS List>>edit>>Key Persons** menu. It opens the following page.

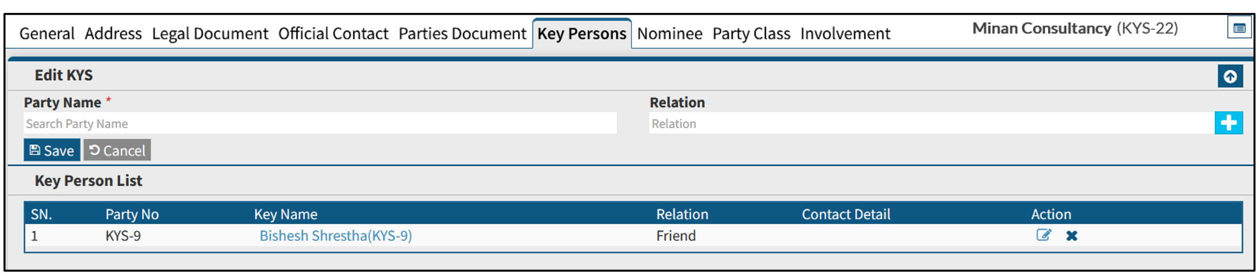


Figure: Add Key Persons

2. To add Key Persons, enter **Party Name** and **Relation** if required and click on the **Save** button. Once the data is added, it appears on **Key Persons List** as shown in the figure.

3. If the key person is not a party then click on button next to the Relation field, the following popup will appear.

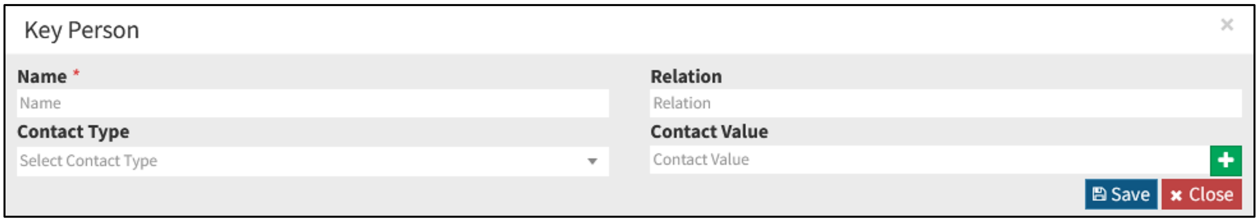


Figure: Add New Key Person

Enter necessary fields. To add multiple contacts, click on the next to the Contact Value field. Finally, click on the **Save** button. Once the data is added, it appears on **Key Person List.**

4. To update the data, click the button in the Action column and make necessary edits.

10.1.1.7 Nominee

To add Nominee, follow the below steps:

1. Open **KYS>>KYS List>>edit>>Nominee** menu. It opens the following page.

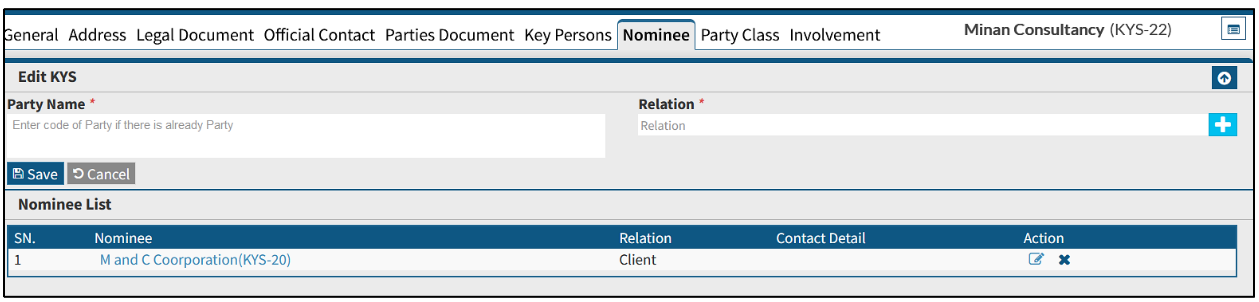


Figure: Add Nominee

2. To add Nominee, enter **Party Name** and **Relation** and click on the **Save** button. Once the data is added, it appears on **Nominee List** as shown in the figure.
3. If the nominee is not a party then click on button next to the Relation field, the following popup will appear.

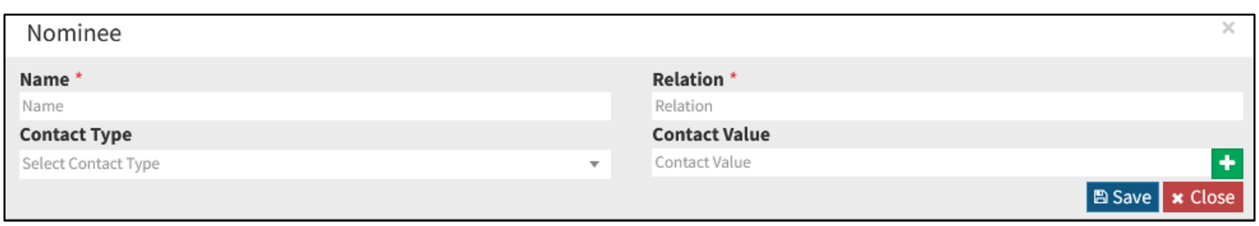


Figure: Add New Nominee

Enter necessary fields. To add multiple contacts, click on the next to the Contact Value field. Finally, click on the **Save** button. Once the data is added, it appears on **Nominee List.**

4. To update the data, click the button in the Action column and make necessary edits.

10.1.1.8 Party Class

This specifies whether a party is a supplier, an employee, student, shareholder or any other type of user.

To add Party Class, follow the below steps:

1. Open **KYS>>KYS List>>edit>>Party Class** menu. It opens the following page.

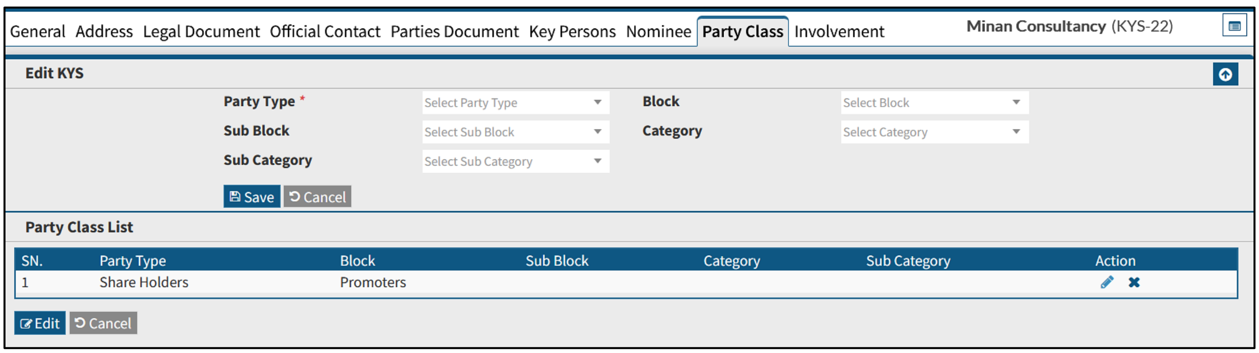


Figure: Add Party Class

2. To add Party Class, enter necessary details and click on the **Save** button. Once the data is added, it appears on **Party Class List** as shown in the figure.
3. To update the data, click the button in the Action column, make the necessary changes, and then click the button below the table to save the changes.
4. If an update is not needed after you click on the button, then click on the button and click Yes.

10.1.1.9 Involvement

To add Involvement, follow the below steps:

1. Open **KYS>>KYS List>>edit>>Involvement** menu. It opens the following page.

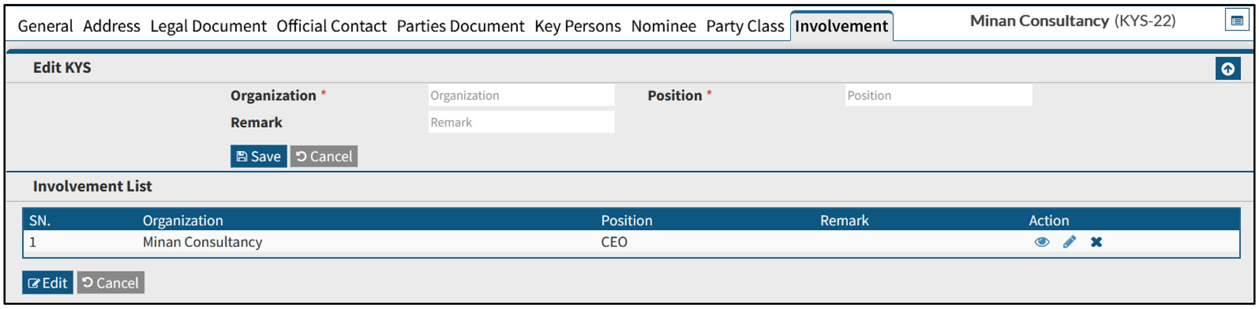


Figure: Involvement

2. To add Involvement, enter necessary details and click on the **Save** button. Once the data is added, it appears on **Involvement List** as shown in the figure.
3. To update the data, click the button in the Action column, make the necessary changes, and then click the Edit button below the table to save the changes.
4. If an update is not needed after you click on the button, then click on the Cancel button and click Yes.

10.1.2 KYS List

1. Open **KYS>>KYS List** menu. It opens the following **KYS List** page.

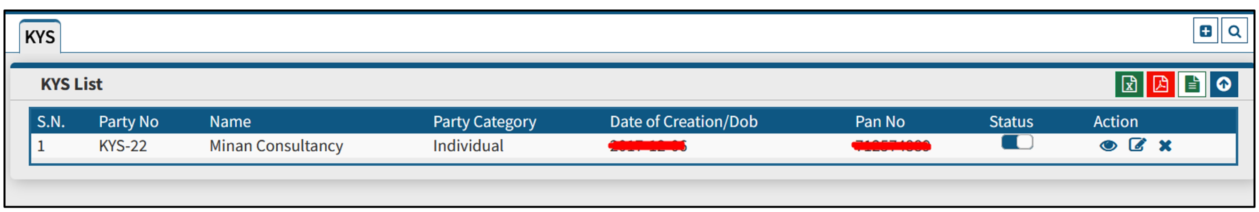


Figure: KYS List

The saved data will be listed in **KYS** List.

Note: The General, Address, Legal Document, Official Contact, Parties Document, Key Persons, Nominee, Party Class and Involvement can be opened by clicking button in the list page.

10.1.3 Party Report

A complete report on the party will be generated, and users will be able to view the detailed information.

Follow the below steps to view party report

1. Open **KYS>>Party Report** menu. It opens the following **Party Report** page.

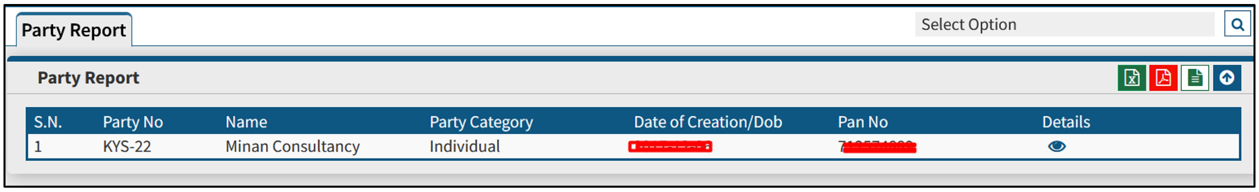


Figure: Party Report

Select Option allows the user to decide which columns they want to view.

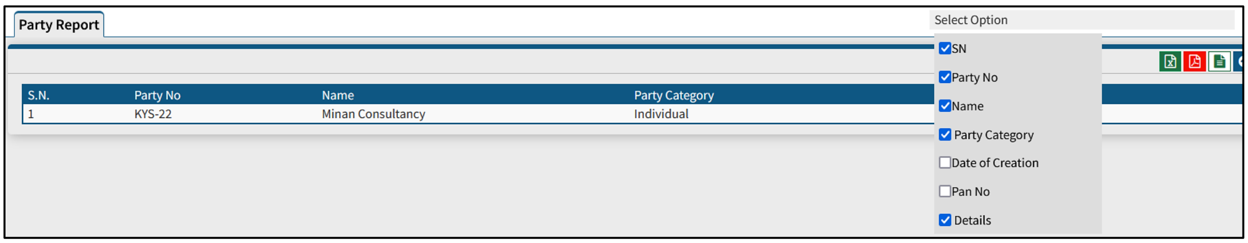


Figure 71: Select Option

Date of Creation and **Pan No** are unchecked, so these columns are not displayed in the table.

10.2 Document

Different types of documents attachment can be entered here. A document can be a passport, citizenship, license, company documents, business paperwork, or general documents. The document can be on a party basis. Documents can be about any subject.

10.2.1 Create Document

10.2.1.1 Steps

1. Open **Document>>Create Document** menu. It opens the following **Add Document** page.

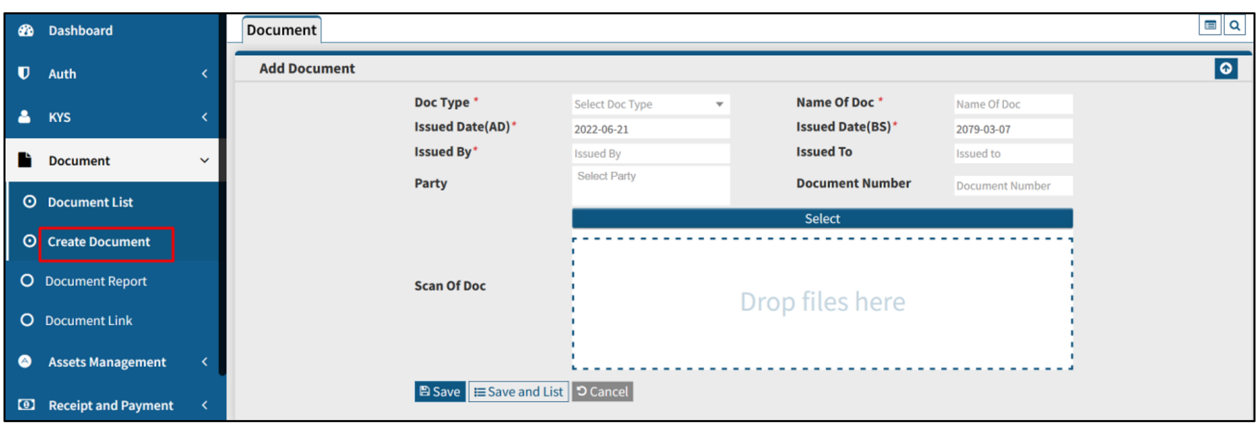


Figure: Add Document

2. Enter the required details.
3. Click **Save** or **Save and List** button to save the data.

10.2.2 Document List

10.2.2.1 Steps

1. Open **Document>>Document List** menu. It opens the following **Document List** page.

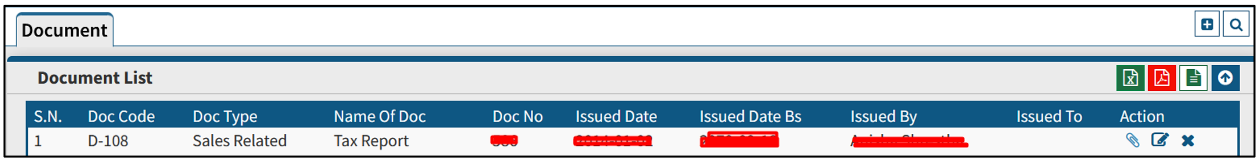


Figure 73: Document List

The saved data will be listed in **Document List.**

10.2.3 Document Report

10.2.3.1 Steps

Open **Document>>Document Report** menu. It opens the following **Document Report** page.

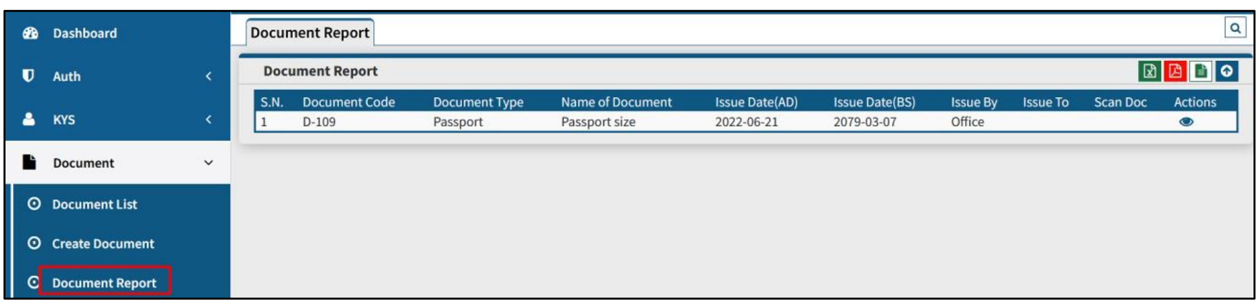


Figure: Document Report

10.2.4 Document Link

This allows user to link documents to a party, account, Sales, Purchase, Receipt, Payment, and so on.

10.2.4.1 Steps

1. Open **Document>>Document Link** menu. It opens the following **Document Link** page.

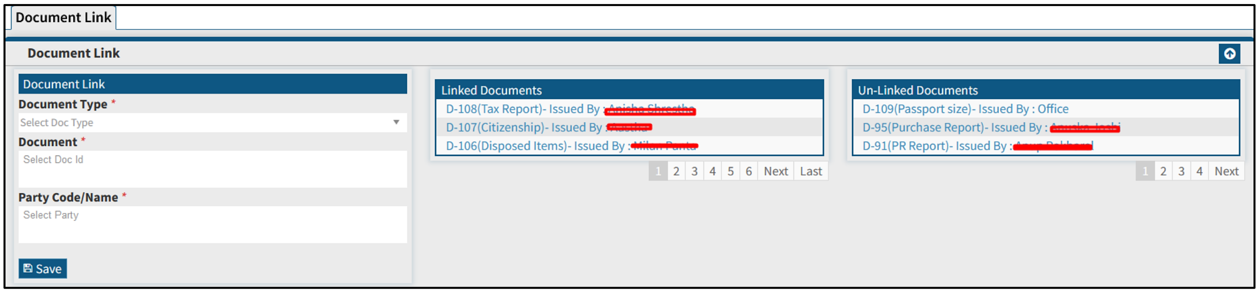


Figure: Document Link

2. To link documents to multiple parties, select **Document Type, Document** and the **Party Code/Name** and Click on the **Save** button.

3. The document that are linked to a party will appear in the **Linked Documents** and the documents that are not linked to a party will appear in the **Un-Linked Documents** as shown in the figure.

10.3 Receipt and Payment

10.3.1 Create Receipt Record

10.3.1.1 Steps

1. Open **Receipt and Payment>>Create Receipt Record** menu. It opens the following **Add Receipt Record** page.

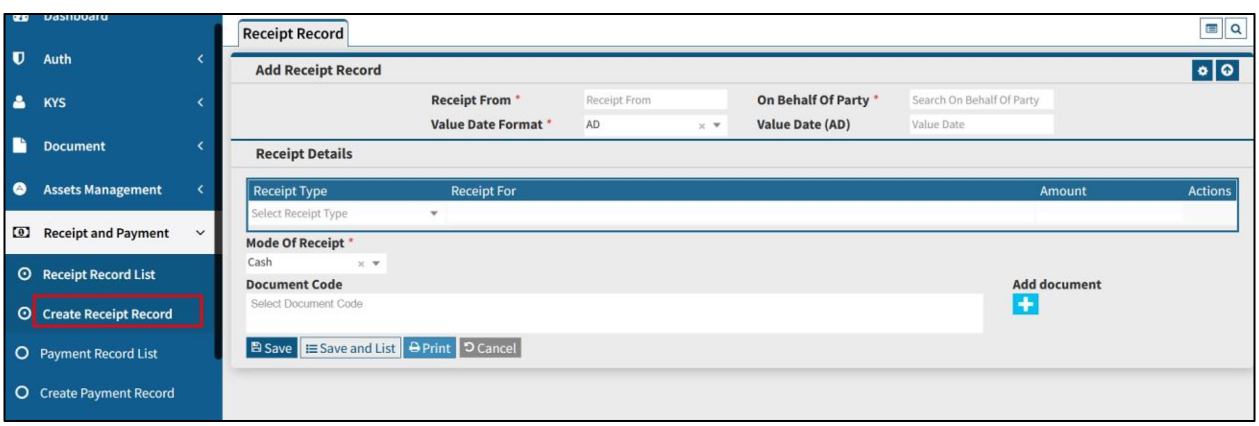


Figure: Add Receipt Record

2. To change the date, click on the button. User can select AD or BS from the date format dropdown and insert the date accordingly.

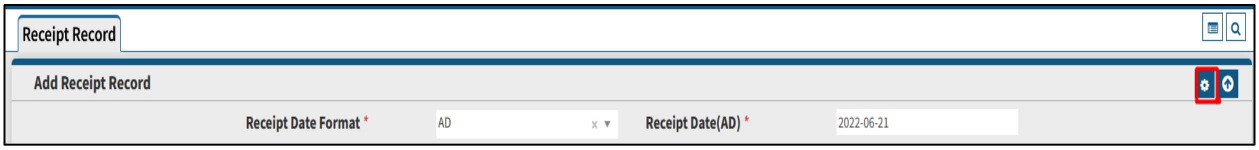


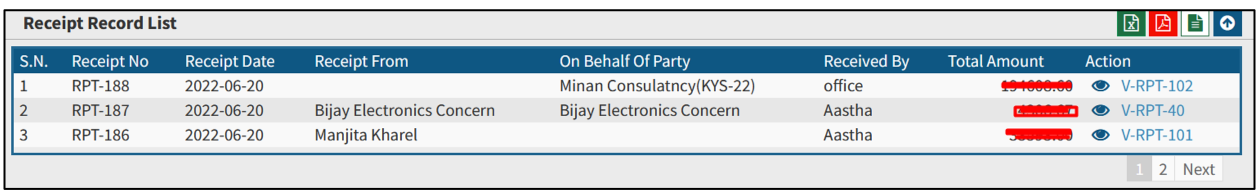
Figure: Receipt Record Settings

3. Enter the required details. Click on the to add new document.
4. Click **Save** or **Save and List** or **Print** button to save the data.

10.3.2 Receipt Record List

10.3.2.1 Steps

1. Open **Receipt and Payment>>Receipt Record List** menu. It opens the following **Receipt Record List** page.



Receipt Record List

S.N.	Receipt No	Receipt Date	Receipt From	On Behalf Of Party	Received By	Total Amount	Action
1	RPT-188	2022-06-20		Minan Consulatncy(KYS-22)	office	[redacted]	V-RPT-102
2	RPT-187	2022-06-20	Bijay Electronics Concern	Bijay Electronics Concern	Aastha	[redacted]	V-RPT-40
3	RPT-186	2022-06-20	Manjita Kharel		Aastha	[redacted]	V-RPT-101

1 2 Next

Figure: Receipt Record List

The saved data will be listed in **Receipt Record List.**

10.3.3 Create Payment Record

10.3.3.1 Steps

1. Open **Receipt and Payment>>Create Payment Record** menu. It opens the following **Add Payment Record** page.

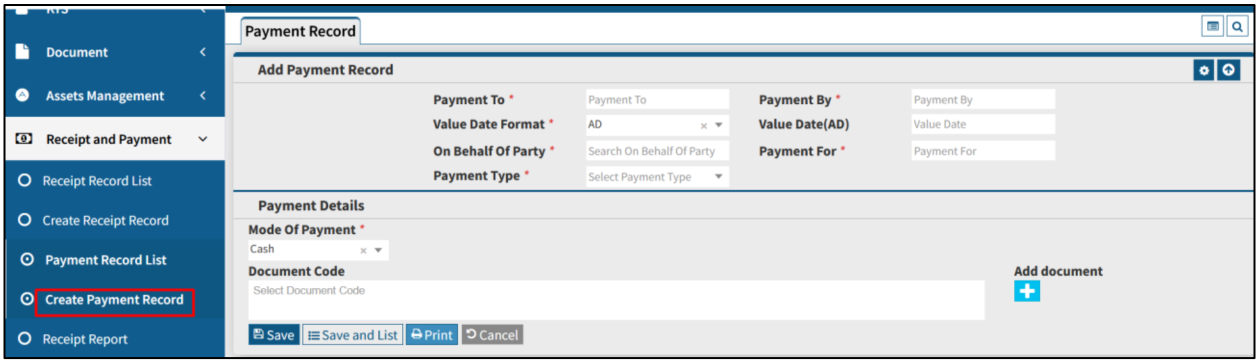


Figure: Add Payment Record

2. To change the date, click on the button. User can select AD or BS from the date format dropdown and insert the date accordingly.

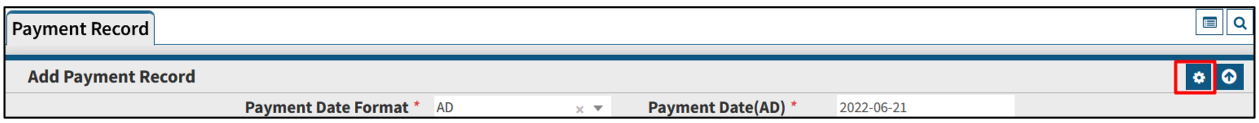


Figure: Payment Record Settings

3. To add the payment details, select payment type, a table will appear on the basis of **Payment Type.**

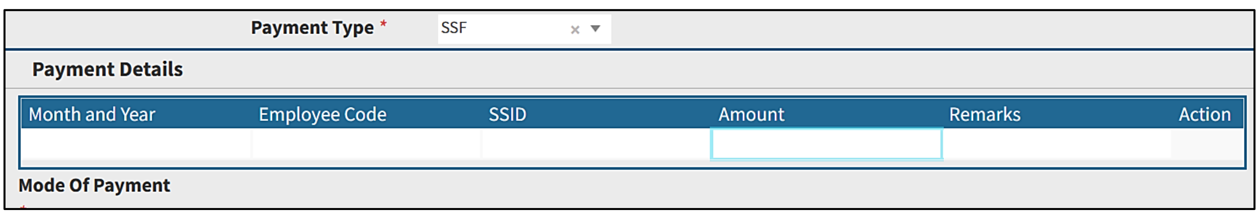


Figure: Add Payment Details

4. Now, enter the required details in the remaining fields. Click on the to add new document.
5. Click **Save** or **Save and List** or **Print** button to save the data.

10.3.4 Payment Record List

10.3.4.1 Steps

1. Open **Receipt and Payment>>Payment Record List** menu. It opens the following **Payment Record List** page.

Payment Record List

S.N.	Payment No.	Payment Date	Payment To	On Behalf Of Party	Payment By	Total Amt	Action
1	PMT-187	2022-06-20	office	L.S. Private Limited(KYS-18)	Aastha	[redacted]	V-PMT-48
2	PMT-186	2022-06-20	Anisha Shrestha	Anisha Shrestha	Aastha	[redacted]	V-PMT-76
3	PMT-185	2022-06-20	office	Esha Pradhan(KYS-7)	Sudhikshya Sapkota	[redacted]	V-PMT-180

Figure: Payment Record List

The saved data will be listed in **Payment Record List.**

10.3.5 Receipt Report

The overall report of the receipt will be generated and can be viewed through this module.

10.3.5.1 Steps

Open **Receipt and Payment>>Receipt Report** menu. It opens the following **Receipt Report** page.

Receipt Report

SN.	Receipt No	Date of Receipt	Receipt From	On Behalf of Party Name	Mode of Receipt	Actions
1	RPT-188	2022-06-20		Minan Consulatncy(KYS-22)	Cash	
2	RPT-187	2022-06-20	Bijay Electronics Concern	Bijay Electronics Concern	Card	
3	RPT-186	2022-06-20	Manjita Kharel		Bank	

1 2 Next

Figure: Receipt Report

10.3.6 Payment Report

The detailed report of the payment will be generated and can be viewed through this module.

10.3.6.1 Steps

Open **Receipt and Payment>>Receipt Report** menu. It opens the following **Receipt Report** page.

Payment Report

SN.	Payment No.	Date of Payment	Payment To	On Behalf of Party Name	Mode of Payment	Payment For	Payment By	Actions
1	PMT-187	2022-06-20	office	L.S. Private Limited(KYS-18)	Bank	Purchase	Aastha	
2	PMT-186	2022-06-20	Anisha Shrestha	Anisha Shrestha	Card	Sales Return	Aastha	
3	PMT-185	2022-06-20	office	Esha Pradhan(KYS-7)	Card	Sales	Sudhikshya Sapkota	

Figure: Payment Report

10.4 Billing

This module keeps track of the list of goods or services sold to a customer alongside the price, quantity, and other relevant information. Here the invoice will be generated which can be printed by the user.

10.4.1 Create Sales

10.4.1.1 Steps

1. Open **Billing>>Create Sales** menu. It opens the following **Add Sales** page.

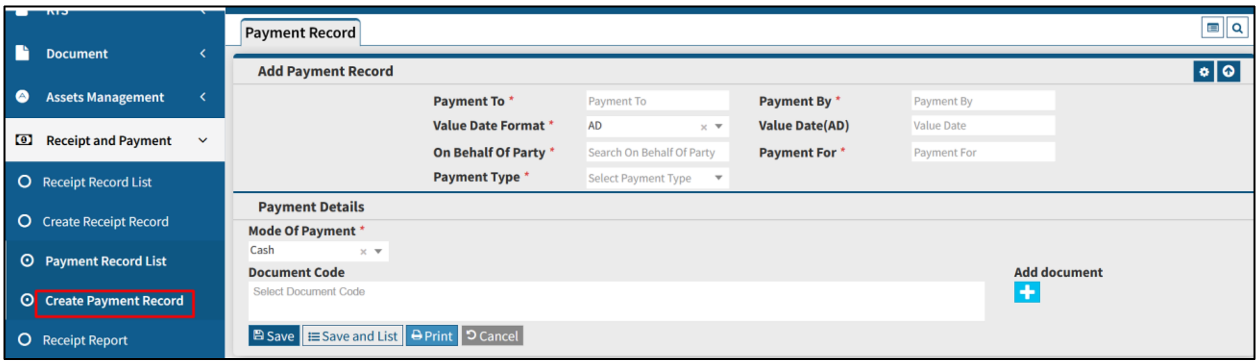


Figure: Add Sales

2. To change the **Date, Branch, Counter and Bill Type**, click on the button. User can select AD or BS from the date format dropdown and insert the date accordingly.

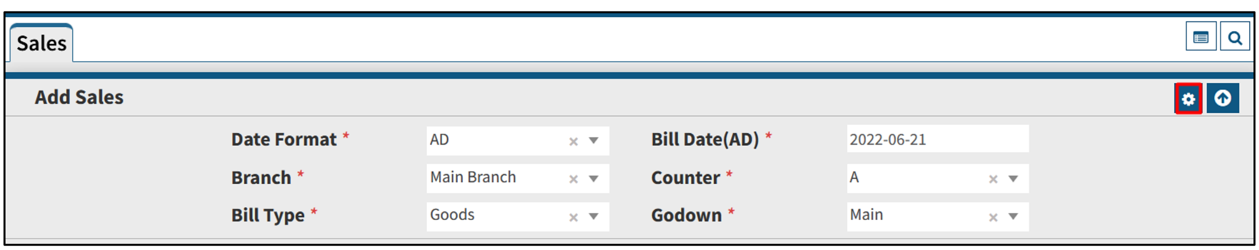


Figure: Sales Settings

3. To create sales, first the user enters Customer Name or Party Name. If the user wants to enter **Party Name,** then user can click on the slider else if the user wants to enter **Customer Name** then user can again click on the slider.

Figure: Slider

4. Now, select the **Items Name** and **Quantity** and press **Enter** key. The items will be added to the list. If the user presses **Enter** in the **Items Name** field, then quantity of that item will be inserted as 1.

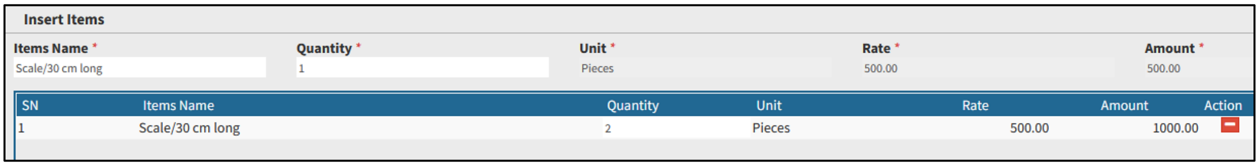


Figure: Insert Items

5. To add new items, click on the New Items button, following popup will appear.

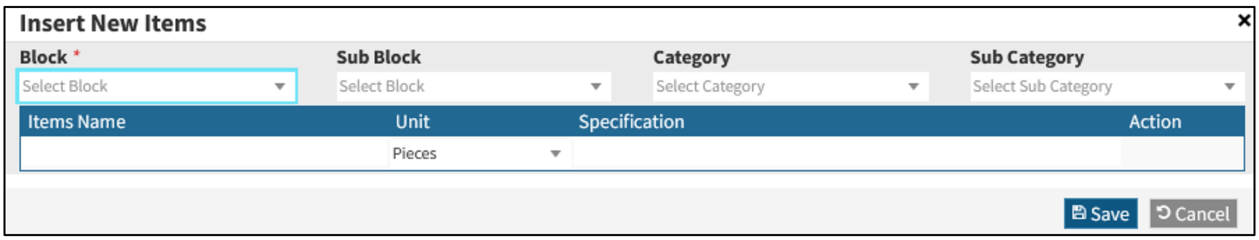


Figure: Insert New Items

Insert the details and click on the **Save** button. After that **Tax and Pp Rate** popup will appear, which is shown in the figure below.

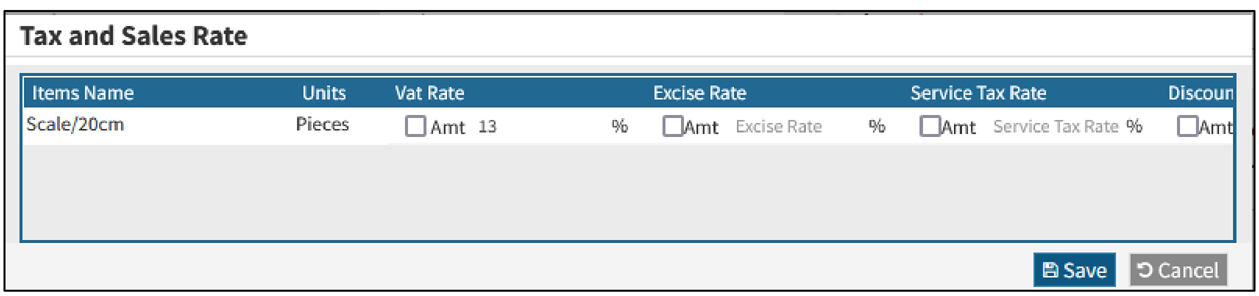


Figure: Tax and SP Rate

Insert the rates if required and click on the **Save** button. Once the item is saved, it will appear in the Items Name dropdown, which is shown in the figure below.

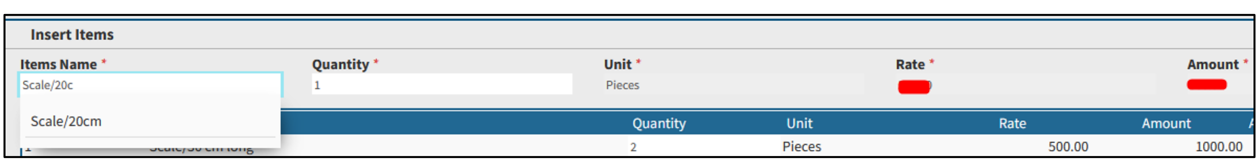


Figure: New Item

6. Now, enter the required details in the remaining fields. Click on the to add new document.
7. Click **Save** or **Save and List** or **Print** button to save the data.

10.4.2 Sales List

10.4.2.1 Steps

1. Open **Billing>>Sales List** menu. It opens the following **Sales List** page.

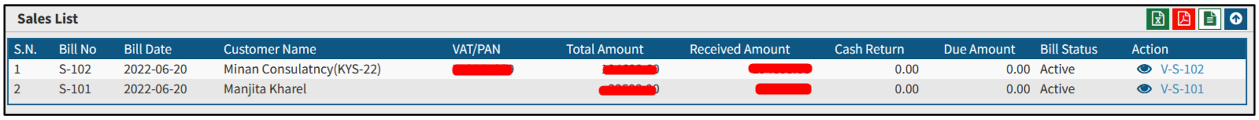


Figure: Sales List

The saved data will be listed in **Sales List.**

10.4.3 Create Sales Return

10.4.3.1 Steps

1. Open **Billing>>Create Sales Return** menu. It opens the following **Add Sales Return** page.

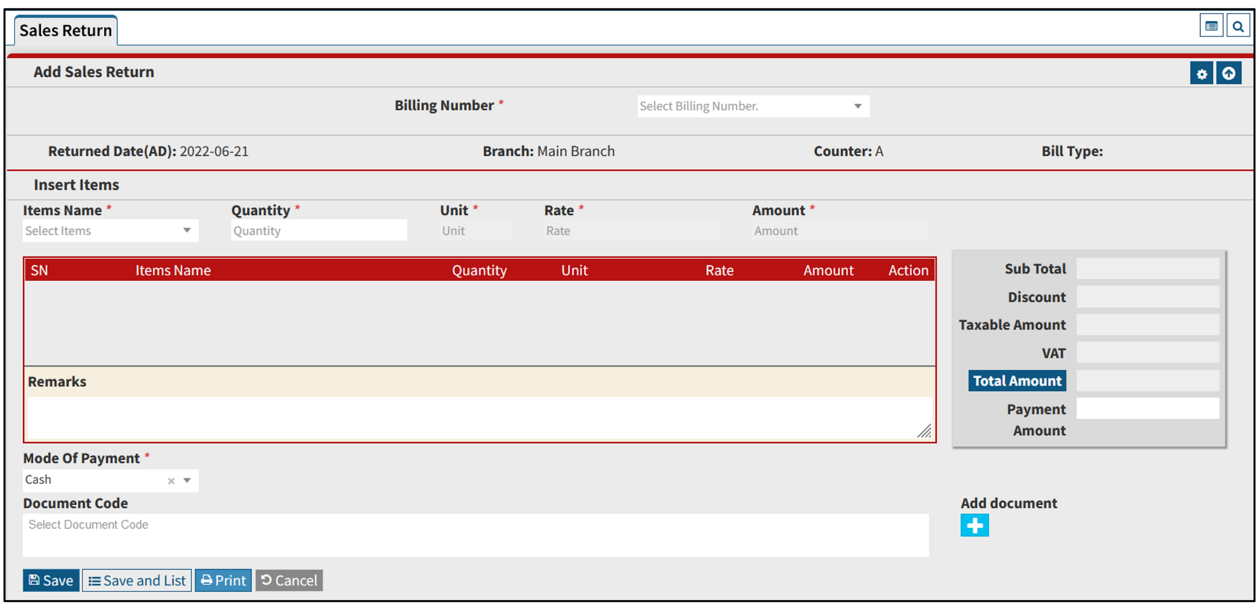


Figure: Add Sales Return

2. To change the **Date, Branch and Counter**, click on the button. User can select AD or BS from the date format dropdown and insert the date accordingly.

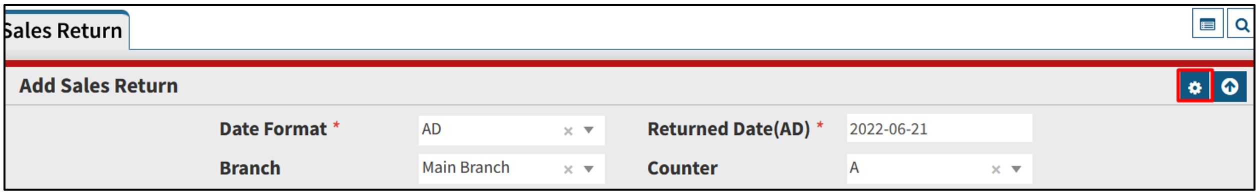


Figure: Sales Return Settings

3. To create sales return, first the user selects the **Billing Number**. If the user selects the Billing Number, its respective **Party Name, Payment To** and **Bill Type** will be displayed.
4. Once the **Billing Number** is selected, **Items Name** can be selected.
5. Now, select the **Items Name** and **Quantity** and press **Enter** key. The items will be added to the list.

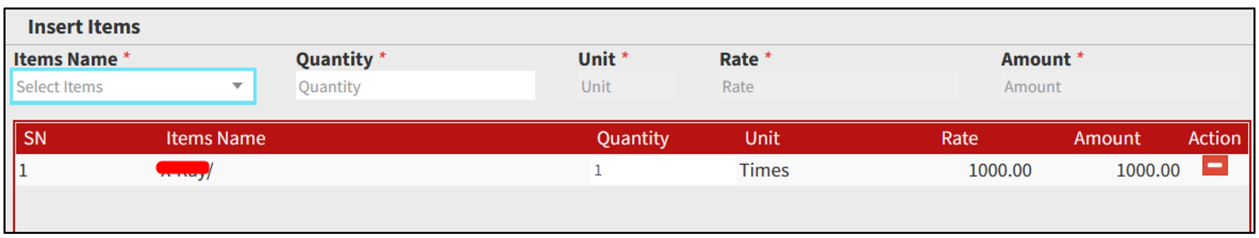


Figure: Insert Items

6. Now, enter the required details in the remaining fields. Click on the to add new document.
7. Click **Save** or **Save and List** or **Print** button to save the data.

10.4.4 Sales Return List

10.4.4.1 Steps

1. Open **Billing>>Sales Return List** menu. It opens the following **Sales Return List** page.

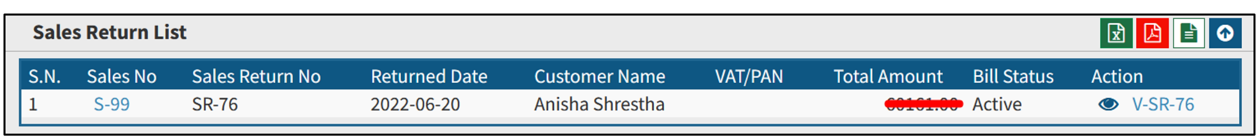


Figure: Sales Return List

The saved data will be listed in **Sales Return List.**

10.4.5 Sales Report

The detailed report generated through sales and sales return can be viewed through this module. The user can print the detailed report.

10.4.5.1 Steps

Open **Billing>>Sales Report** menu. It opens the following **Sales Report** page.

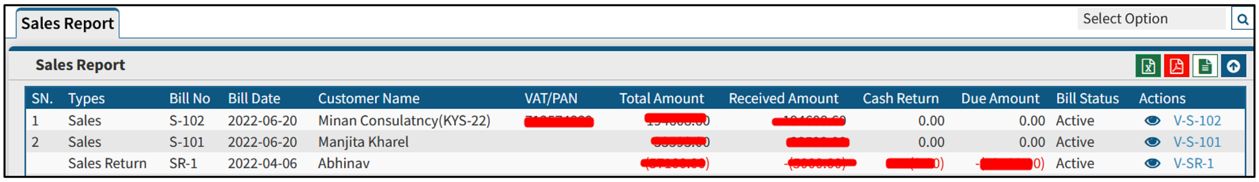


Figure: Sales Report

10.5 Accounting

This module is responsible for preparing the financial statements, maintaining the general ledger, bills, receipt and payment, and more.

10.5.1 Create Journal

10.5.1.1 Steps

1. Open **Accounting>>Create Journal** menu. It opens the following **Add New Journal** page.

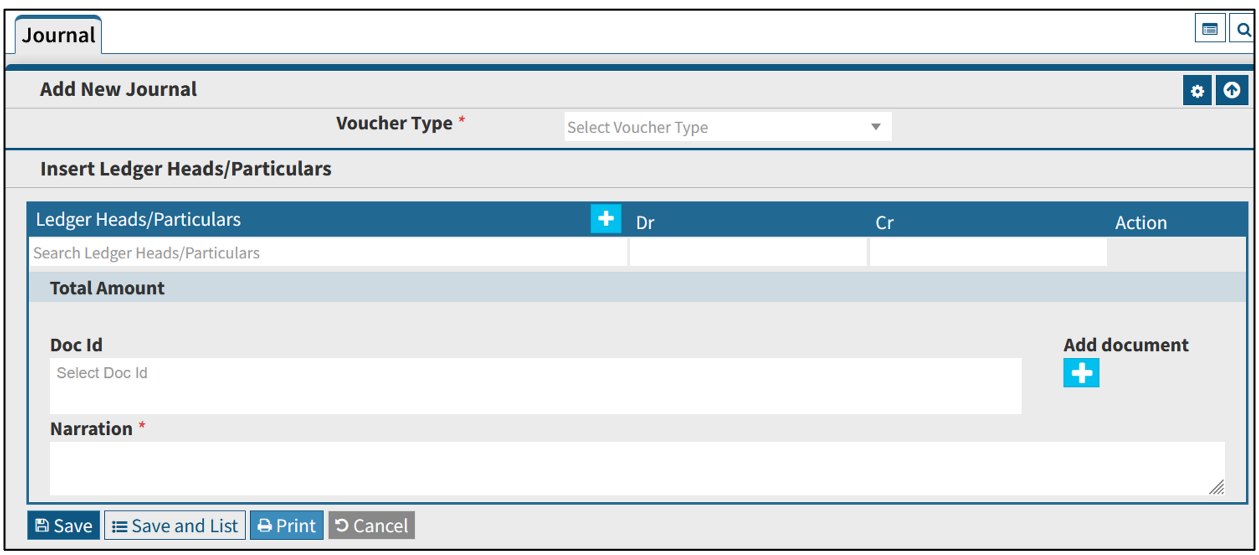
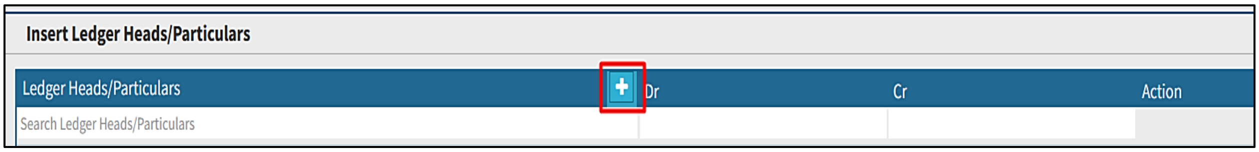


Figure: Add New Journal

2. To change the **Date and Fiscal Year**, click on the button. User can select AD or BS from the date format dropdown and insert the date accordingly.

Figure: Journal Settings

3. To create journal, first insert **Ledger Heads/Particulars.** *(Note: Debit and Credit Amount must be equal)*. If the **Ledger Heads/Particulars** does not exist then click on the in the Ledger Heads/Particulars column to create new ledger.



Once clicked, the following popup will appear.

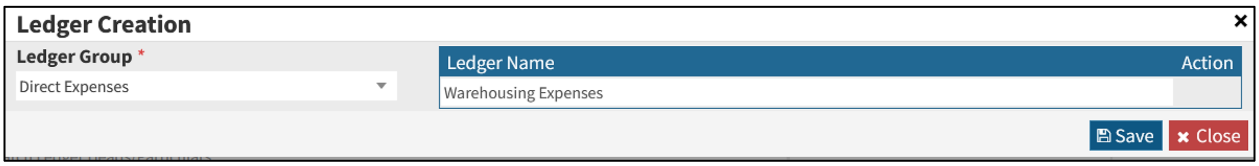


Figure: Ledger Creation

Insert **Ledger Group** and **Ledger Name** and click on the **Save** button. Once the Ledger is saved, it will appear in the **Ledger Heads/Particulars'** dropdown, which is shown in the figure below.

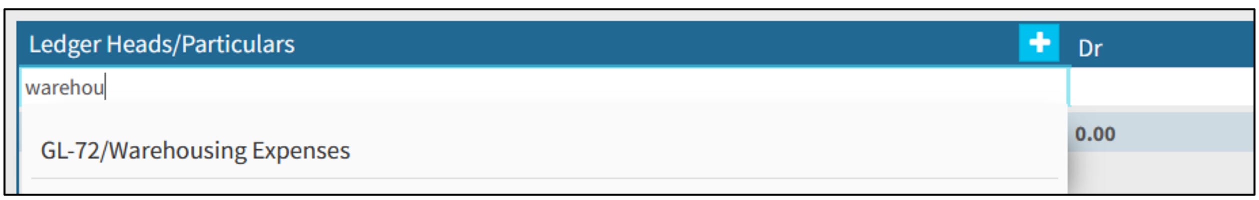


Figure: New Ledger

4. Now, enter the required details in the remaining fields. Click on the to add new document.
5. Click **Save** or **Save and List** or **Print** button to save the data.

10.5.2 Journal List

10.5.2.1 Steps

1. Open **Accounting>>Journal List** menu. It opens the following **Journal List** page.

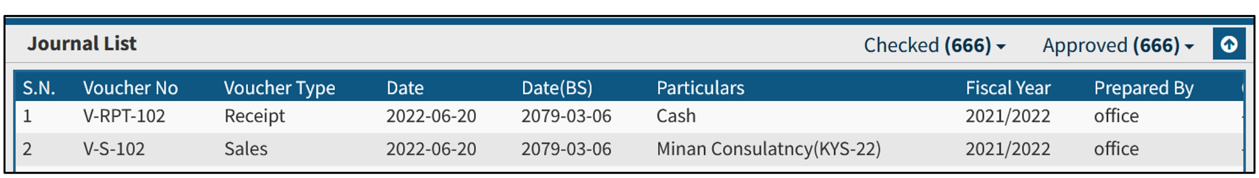


Figure: Journal List

The saved data will be listed in **Journal List.**

There are **Checked Status** and **Approved Status** in the Journal List page, which is only accessible to the authorized user.

How to Check or Approve Status?

1. Click on the **Pending** button in the Checked Status column.

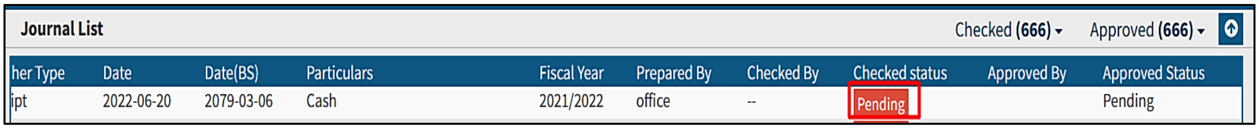


Figure: Checked Status

Once clicked, the following popup will appear.

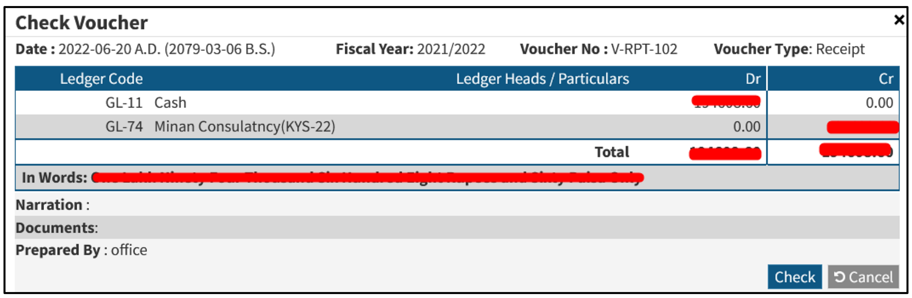


Figure: Check Voucher

2. Click on the **Check** button. The status can be **Approved** only after the status is checked. Now click on the **Pending** button in the Approved Status column and finally click on the **Approve** button.

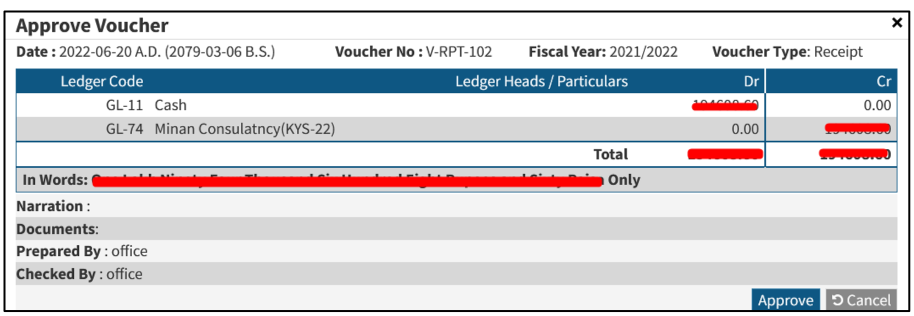
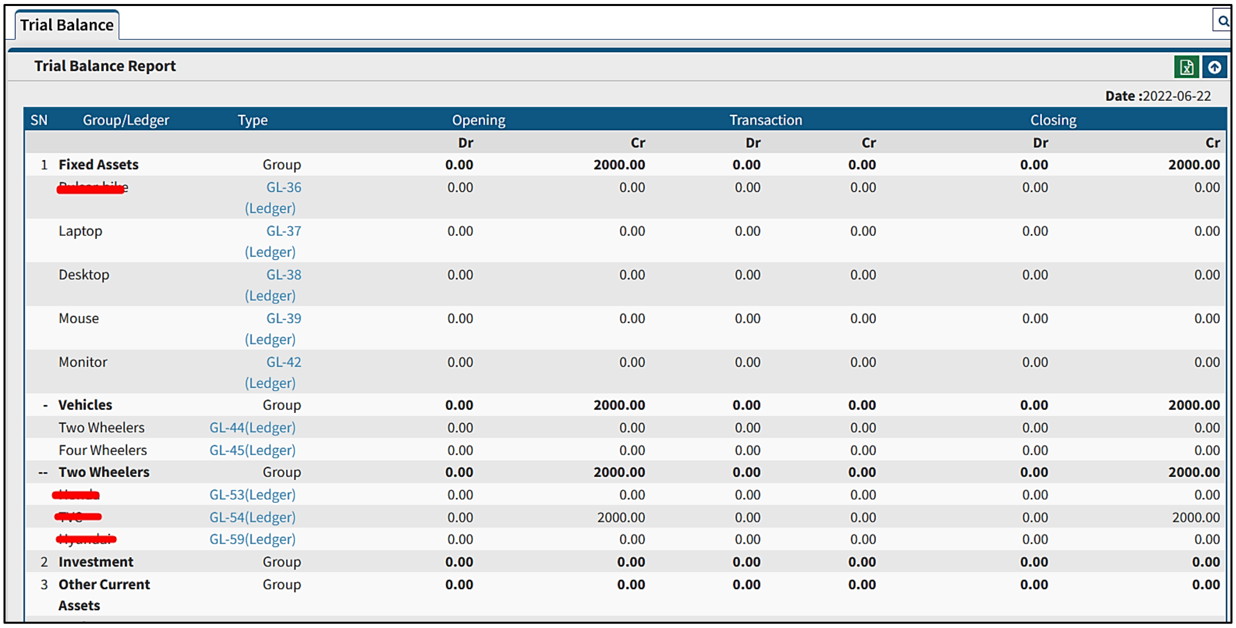


Figure: Approve Voucher

Once the status is approved, journal cannot be updated.

10.5.3 Trial Balance

Open **Accounting>>Trial Balance** menu. It opens the following **Trial Balance** page.



Trial Balance

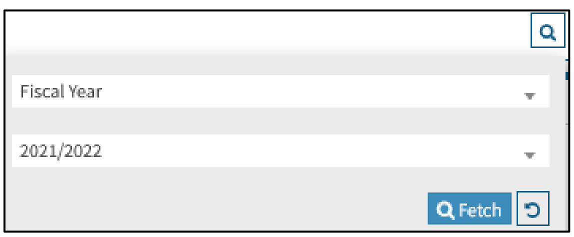
Trial Balance Report

Date :2022-06-22

SN	Group/Ledger	Type	Opening Dr	Opening Cr	Transaction Dr	Transaction Cr	Closing Dr	Closing Cr
1	**Fixed Assets**	Group	**0.00**	**2000.00**	**0.00**	**0.00**	**0.00**	**2000.00**
	[redacted]	GL-36 (Ledger)	0.00	0.00	0.00	0.00	0.00	0.00
	Laptop	GL-37 (Ledger)	0.00	0.00	0.00	0.00	0.00	0.00
	Desktop	GL-38 (Ledger)	0.00	0.00	0.00	0.00	0.00	0.00
	Mouse	GL-39 (Ledger)	0.00	0.00	0.00	0.00	0.00	0.00
	Monitor	GL-42 (Ledger)	0.00	0.00	0.00	0.00	0.00	0.00
-	**Vehicles**	Group	**0.00**	**2000.00**	**0.00**	**0.00**	**0.00**	**2000.00**
	Two Wheelers	GL-44(Ledger)	0.00	0.00	0.00	0.00	0.00	0.00
	Four Wheelers	GL-45(Ledger)	0.00	0.00	0.00	0.00	0.00	0.00
--	**Two Wheelers**	Group	**0.00**	**2000.00**	**0.00**	**0.00**	**0.00**	**2000.00**
	[redacted]	GL-53(Ledger)	0.00	0.00	0.00	0.00	0.00	0.00
	[redacted]	GL-54(Ledger)	0.00	2000.00	0.00	0.00	0.00	2000.00
	[redacted]	GL-59(Ledger)	0.00	0.00	0.00	0.00	0.00	0.00
2	**Investment**	Group	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**
3	**Other Current Assets**	Group	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**

Figure: Trial Balance

- User can filter the trial balance report. By clicking filter button in the navbar, user needs to select a time period, and then the report of the selected date will appear on the screen. Time period can be a fiscal year or between certain dates.



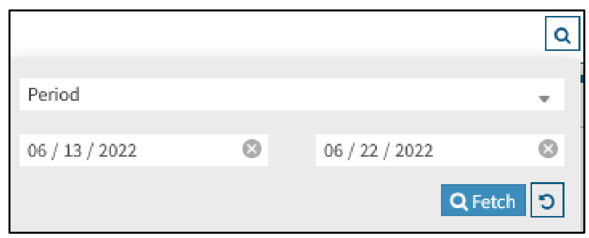
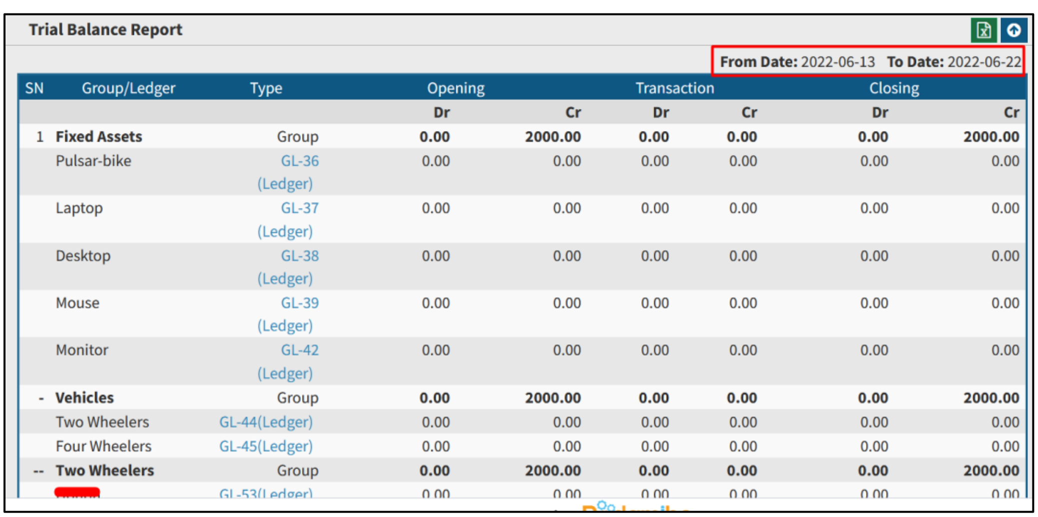


Figure: Trial Balance Filter



Trial Balance Report

From Date: 2022-06-13 **To Date:** 2022-06-22

SN	Group/Ledger	Type	Opening Dr	Opening Cr	Transaction Dr	Transaction Cr	Closing Dr	Closing Cr
1	**Fixed Assets**	Group	**0.00**	**2000.00**	**0.00**	**0.00**	**0.00**	**2000.00**
	Pulsar-bike	GL-36 (Ledger)	0.00	0.00	0.00	0.00	0.00	0.00
	Laptop	GL-37 (Ledger)	0.00	0.00	0.00	0.00	0.00	0.00
	Desktop	GL-38 (Ledger)	0.00	0.00	0.00	0.00	0.00	0.00
	Mouse	GL-39 (Ledger)	0.00	0.00	0.00	0.00	0.00	0.00
	Monitor	GL-42 (Ledger)	0.00	0.00	0.00	0.00	0.00	0.00
-	**Vehicles**	Group	**0.00**	**2000.00**	**0.00**	**0.00**	**0.00**	**2000.00**
	Two Wheelers	GL-44(Ledger)	0.00	0.00	0.00	0.00	0.00	0.00
	Four Wheelers	GL-45(Ledger)	0.00	0.00	0.00	0.00	0.00	0.00
--	**Two Wheelers**	Group	**0.00**	**2000.00**	**0.00**	**0.00**	**0.00**	**2000.00**
	[redacted]	GL-53(Ledger)	0.00	0.00	0.00	0.00	0.00	0.00

Figure: Trial Balance Report between certain date range

- Users can also export the excel file for the selected fiscal year or period by clicking on the button at the top right of the screen.

10.5.4 Ledger

The summarized and classified information from the journals is posted as debits and credits in the ledger. Once the journal is approved it will be displayed in the ledger.

Open **Accounting>>Ledger** menu. It opens the following **Ledger** page.

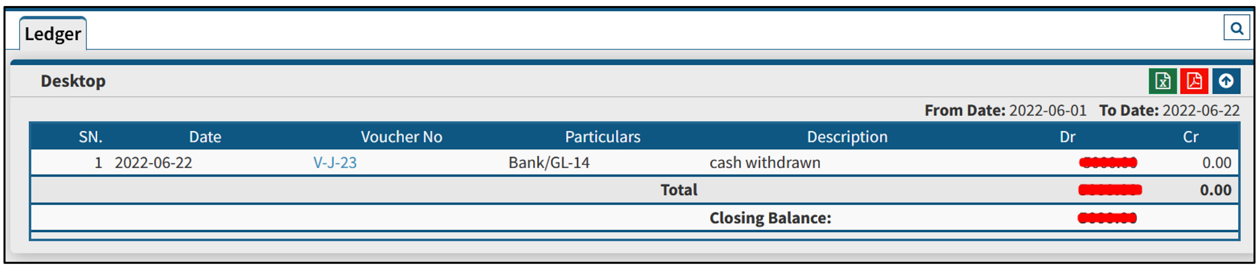


Figure: Ledger

- Users can filter the Ledger report. By clicking filter button in the navbar, user needs to select ledger and a time period, and then the report of the selected date will appear on the screen. Time period can be a fiscal year or between certain dates.

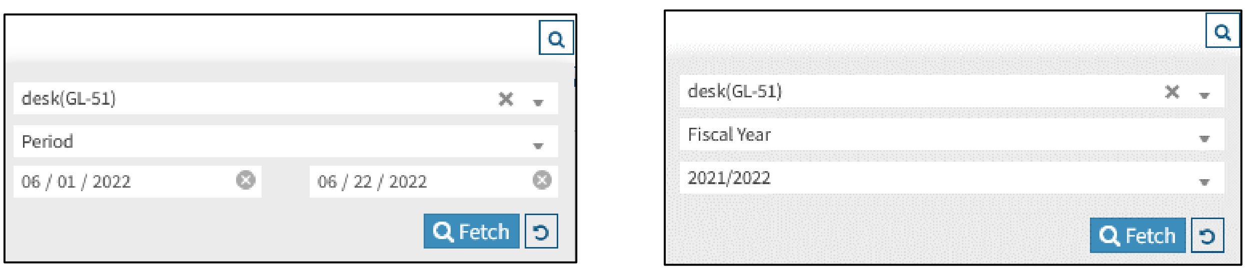


Figure: Ledger Filter

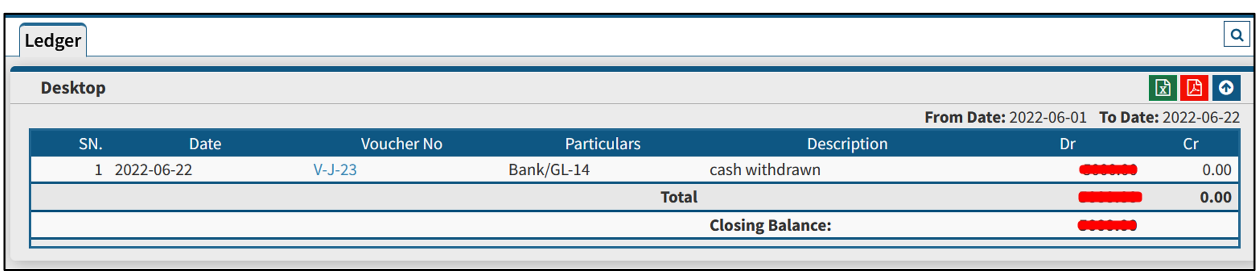


Figure 110: Ledger Report between certain date range

- Users can also export the excel or pdf file for the selected fiscal year or period by clicking on the or button respectively at the top right of the screen.

10.5.5 Draft Ledger

The approved as well as non-approved journals are displayed under the draft ledger.

Open **Accounting>>Draft Ledger** menu. It opens the following **Draft Ledger** page.

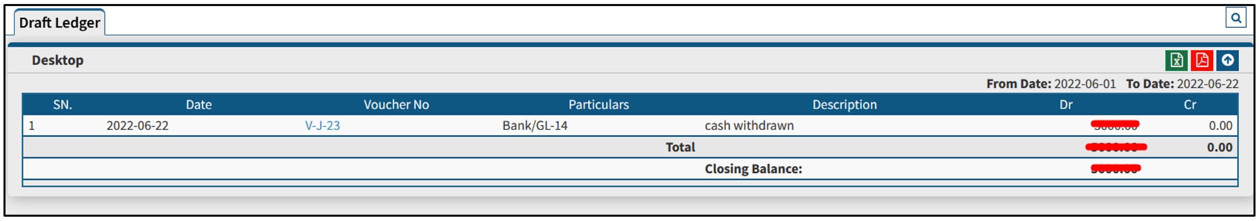


Figure: Draft Ledger

- Users can filter the Ledger report. By clicking filter button in the navbar, user needs to select ledger and a time period, and then the report of the selected date will appear on the screen. Time period can be a fiscal year or between certain dates.

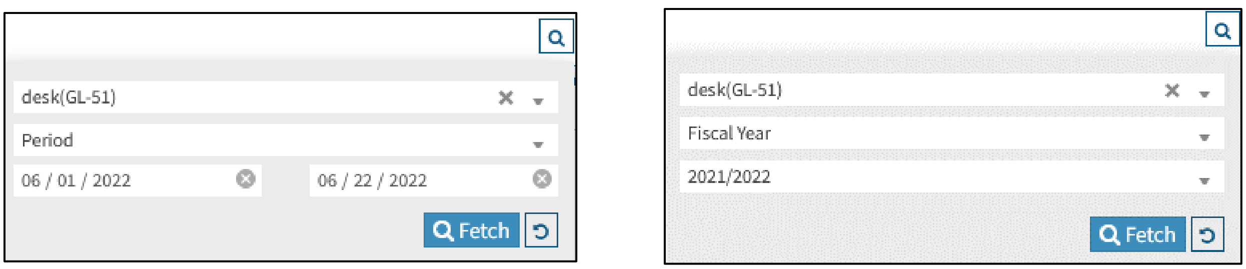


Figure: Draft Ledger Filter

- Users can also export the excel or pdf file for the selected fiscal year or period by clicking on the or button respectively at the top right of the screen.

10.5.6 Income Statement

A summarized report of revenues and expenses is generated and can be viewed on a yearly basis in the income statement.

Open **Accounting>>Income Statement** menu. It opens the following **Income Statement** page.

Income Statement

Fiscal Year: 2078/79

SN.	Particulars	Amount
1	Direct Income	0.00
2	Indirect Income	0.00
	Total Income	0.00
3	Direct Expenses	0.00
4	Indirect Expenses	0.00
5	Duty and Taxes	0.00
	Total Expenses	0.00
	Profit/Loss	0.00

Figure: Income Statement

10.5.7 Balance Sheet

Open **Accounting>>Balance Sheet** menu. It opens the following **Balance Sheet** page.

Balance Sheet

Fiscal Year: 2078/79

SN	Particulars	Amount
1	Fixed Assets	0.00
-	Vehicles	0.00
-	Office Equipments	0.00
-	Plant and Machineries	0.00
2	Investment	0.00
3	Other Current Assets	0.00
4	Cash	[redacted]
	Cash in Hand (Ledger)	[redacted]
	[redacted]	[redacted]
5	Bank	[redacted]
	[redacted]	[redacted]
6	Inventory	0.00
7	Sundry Debtors	0.00
	Total Assets	0.00
8	Sundry Creditors	0.00
9	Bank OD	0.00
10	Other Current Liabilities	0.00
11	Capital	0.00
12	Reserve and Surplus	0.00
13	Profit and Loss	0.00
14	Long and Medium term Loan	0.00
-	Long Term Loan	0.00
-	Medium Term Loan	0.00
	Profit and Loss	0.00
	Total Liabilities	0.00

Figure: Balance Sheet

Note: All the receipt, payment, sales, sales return, purchase and purchase return will be automatically posted into the journal.

11 Vat Khata

11.1 Vat User

11.1.1 Steps

1. Open **Vat Khata>>Vat User** menu. It opens the following **Vat User** page.

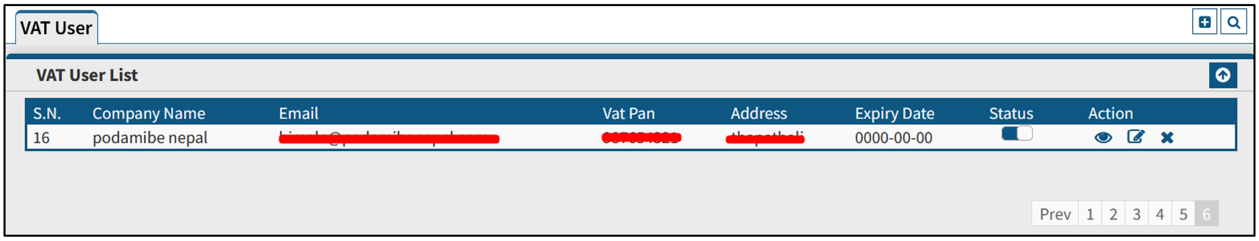


Figure: Vat User

2. Click **create button** in the navbar, it will open the following **Add Vat User** page.

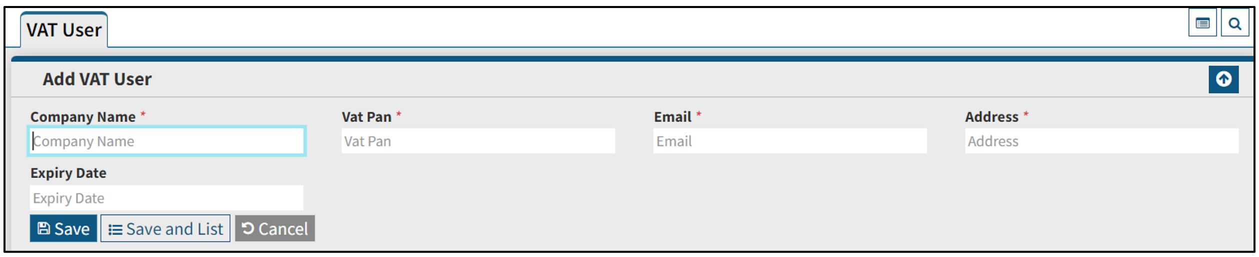


Figure: Add Vat User

3. Enter **Company Name, Vat Pan**, valid **Email Address** and **Expiry Date** if required and click on the Save button. The saved data will show in the **Vat User List** page.

(Note: Vat User can be only created by the authorized person i.e. Admin)

11.2 Vat Sales

Follow the below steps to create **Vat Sales:**

1. Open **Vat Khata>>Sales** menu. It opens the following **Vat Sales** page.

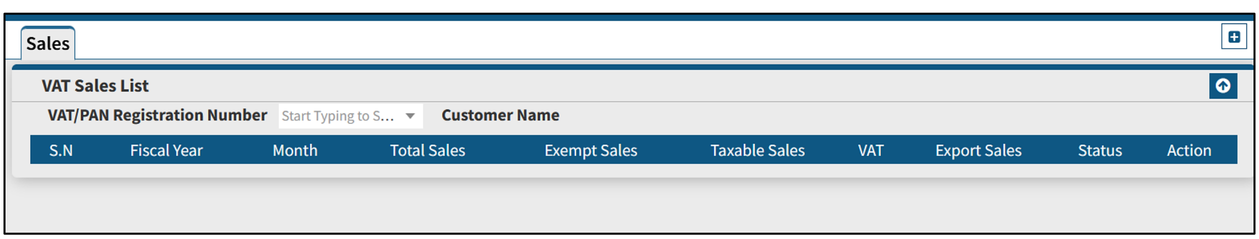


Figure: Vat Sales

2. Click **create button** in the navbar, it will open the following **Add Vat Sales** page.

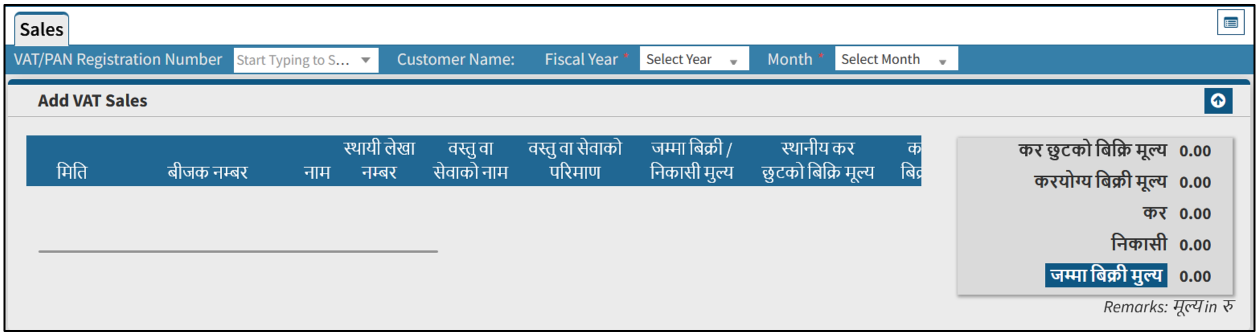


Figure: Add Vat Sales

3. Select the **Vat/Pan Registration Number**, **Fiscal Year** and **Month.** Now, **Add Sales** button will appear.

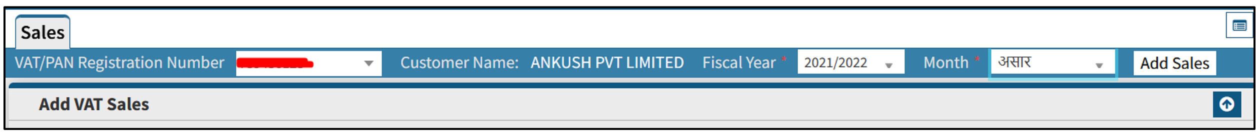


Figure: Add Sales

4. Click the **Add Sales** button, the following form will appear.

Figure: Create Sales Book

5. Enter the required details and click the **Save** button.
6. Once the data is saved, it will appear in the list in the **Add VAT Sales** page.

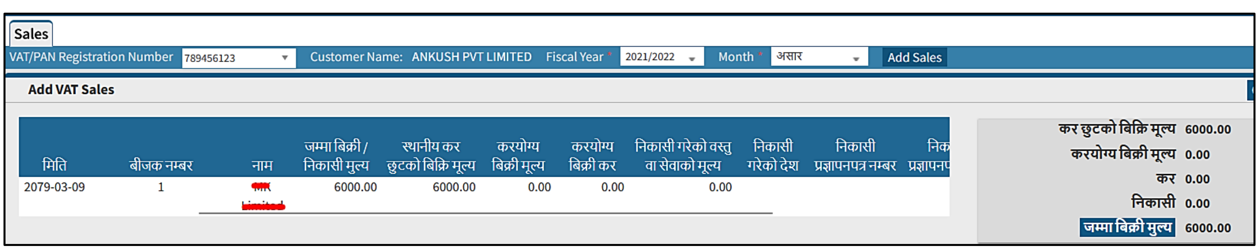


Figure: Vat Sales Data

7. Scroll the table horizontally and click on the **Status**.

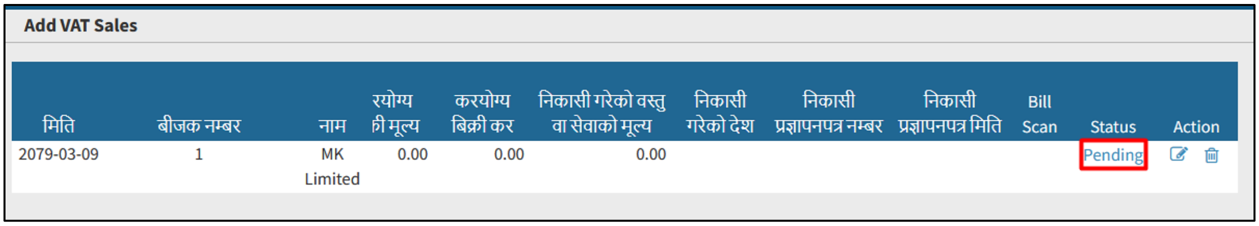


Figure: Vat Sales Status

Upon clicking the status, the following popup will be displayed.

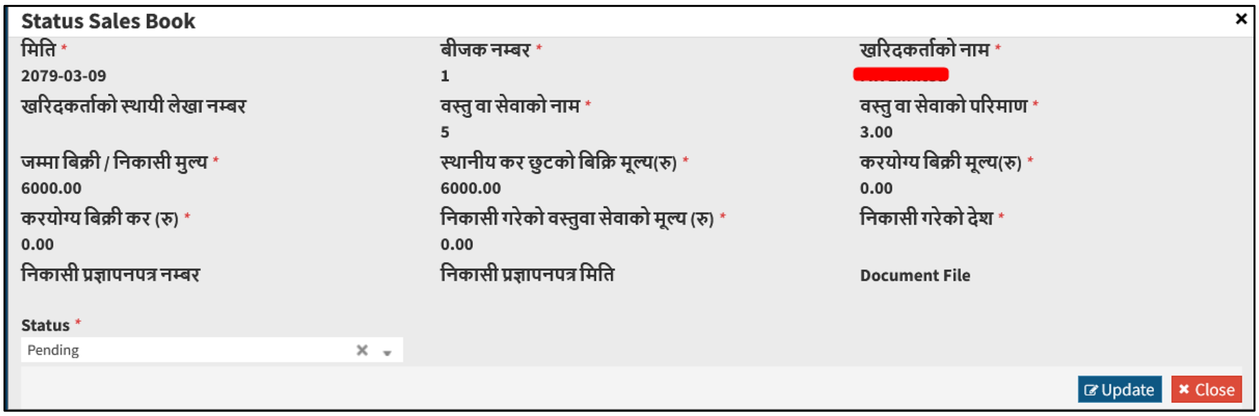


Figure: Status Sales Book

Now, the user can change the status. If the status is **Approved**, then the records cannot be updated.

(Note: The status can be approved by Admin only.)

8. User can also update the data from the add page.

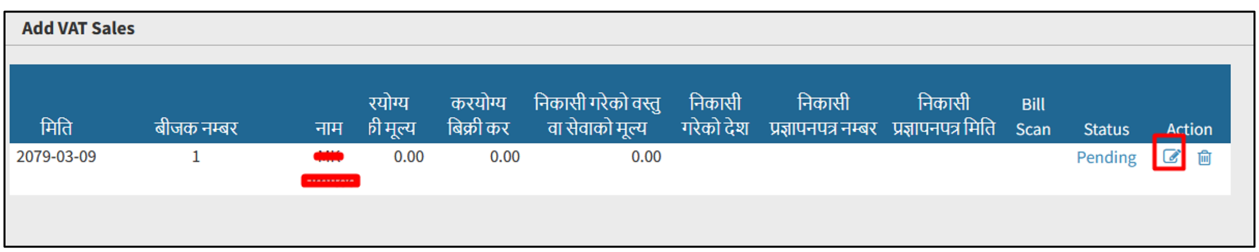


Figure: Vat Sales Edit

11.2.1 Vat Sales List

The saved data will be listed in **Vat Sales List.**

1. Open **Vat Khata>>Sales** menu. It opens the following **Vat Sales List** page.

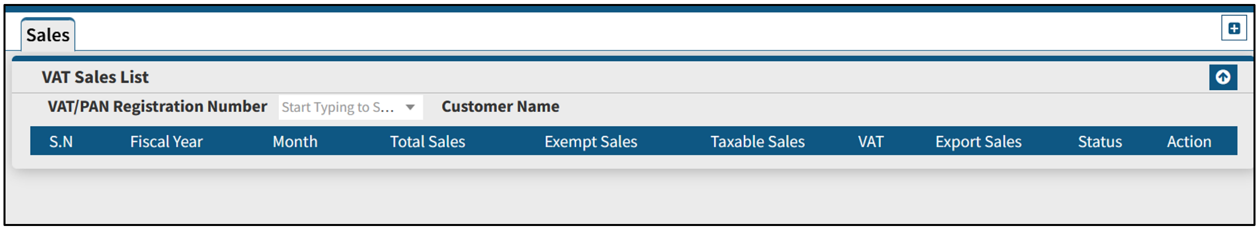


Figure: Vat Sales List page

2. Select the **Vat/Pan Registration Number,** now the data of that customer will appear in the list. User can also export the Vat Sales report of a particular month by click on the excel button.

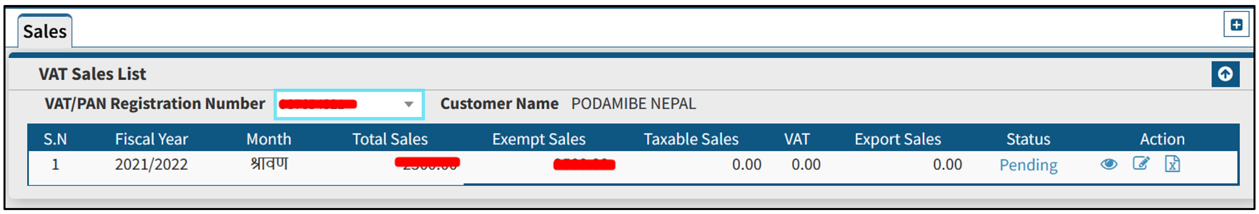


Figure: Vat Sales List

3. Click the **Status**, the following popup will appear.

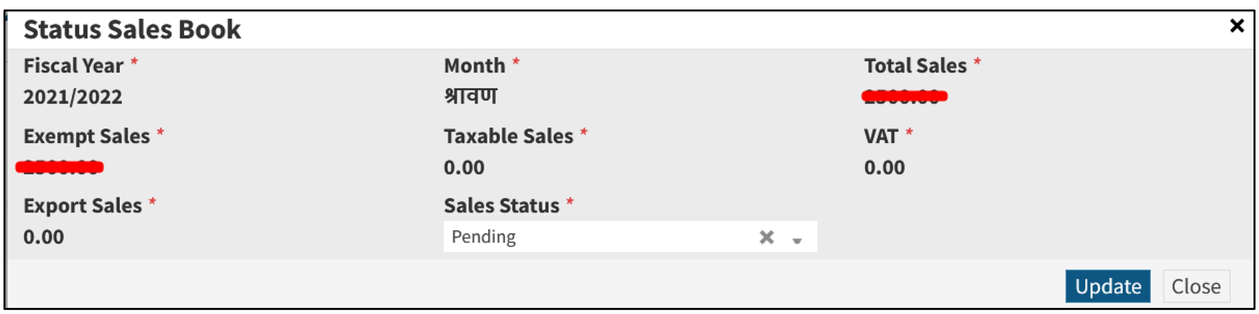


Figure: Status Sales Book

If the status for a particular month is **Approved**, then the data for that month cannot be updated.

Note:

1. ***User can export the Vat Sales Report for a particular month from the list, view and edit pages.***
2. ***The status can be approved by Admin only.***

11.3 Vat Purchase

Follow the below steps to create **Vat Purchase:**

1. Open **Vat Khata>>Purchase** menu. It opens the following **Vat Purchase** page.

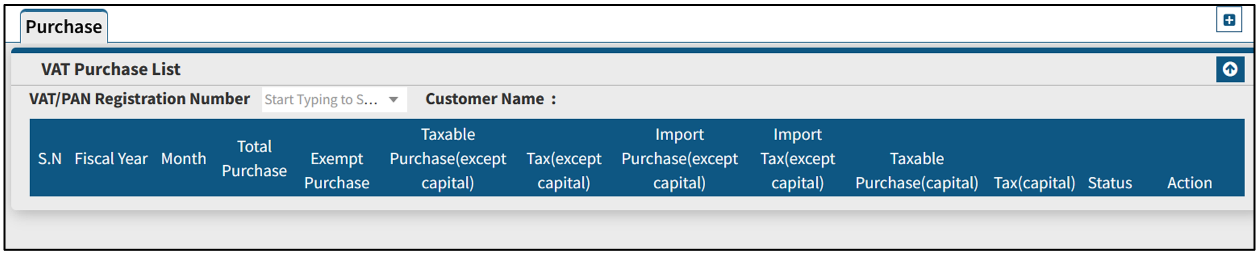


Figure: Vat Purchase

2. Click **create button** in the navbar, it will open the following **Add Vat Purchase** page.

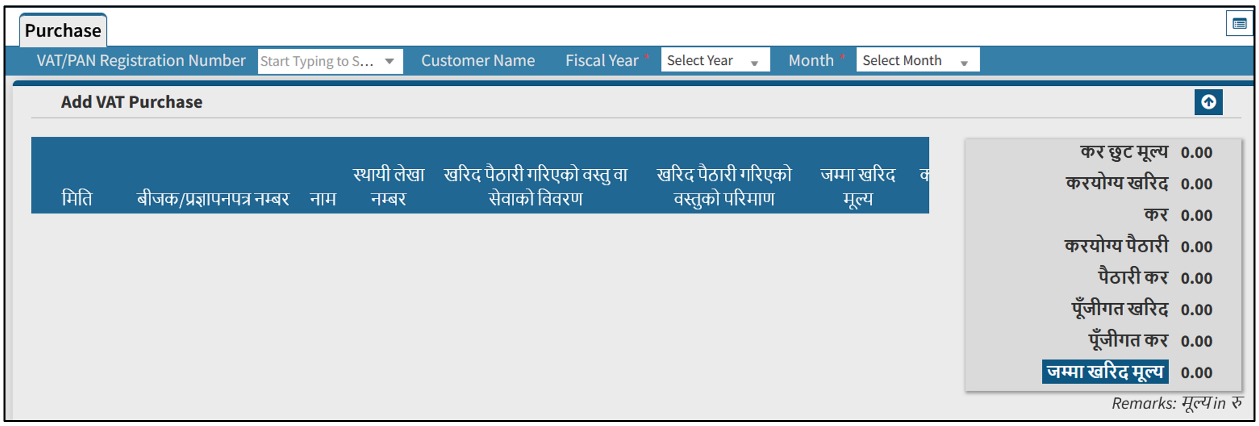


Figure: Add Vat Purchase

3. Select the **Vat/Pan Registration Number**, **Fiscal Year** and **Month.** Now, **Add Purchase** button will appear.

Figure: Add Purchase

4. Click the **Add Purchase** button, the following form will appear.

Figure: Create Purchase Book

5. Enter the required details and click the **Save** button.

6. Once the data is saved, it will appear in the list in the Add VAT Purchase page.

Figure: Vat Purchase Data

7. Scroll the table horizontally and click on the **Status**.

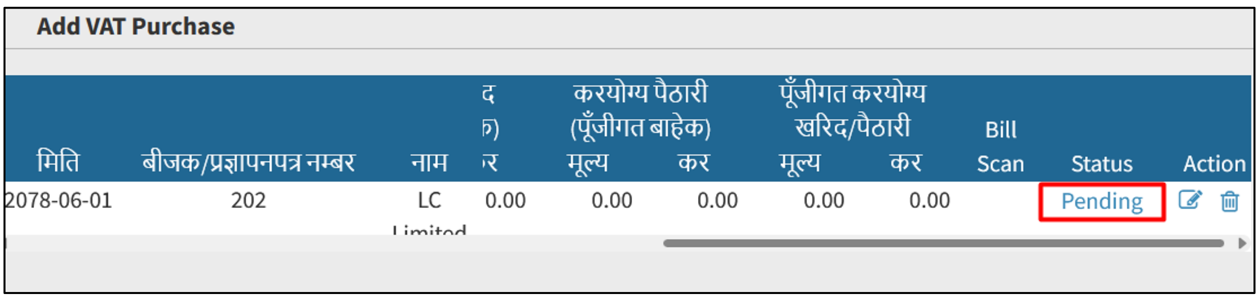


Figure: Vat Purchase Status

Upon clicking the status, the following popup will be displayed.

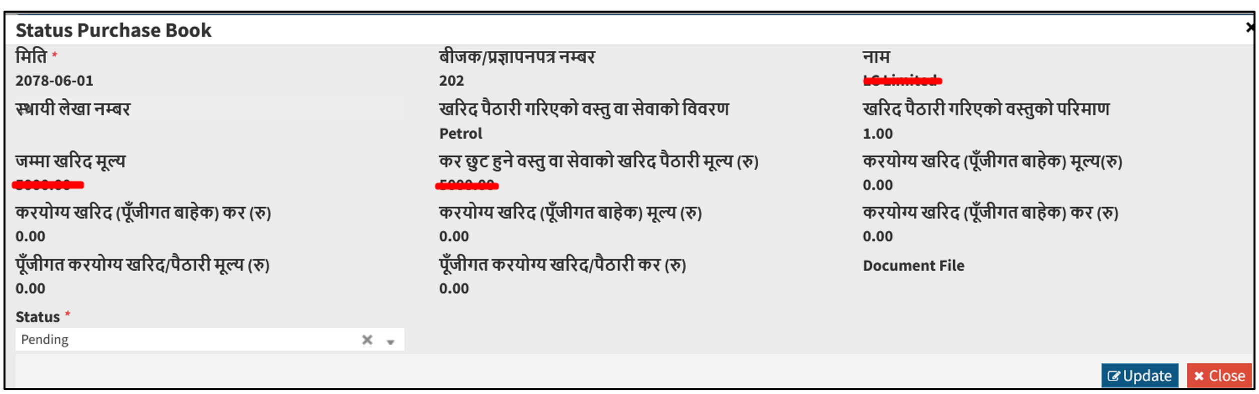


Figure: Status Purchase Book

Now the user can change the status. If the status is **Approved**, then the records cannot be updated.

(Note: The status can be approved by Admin only.)

8. User can also update the data from the add page.

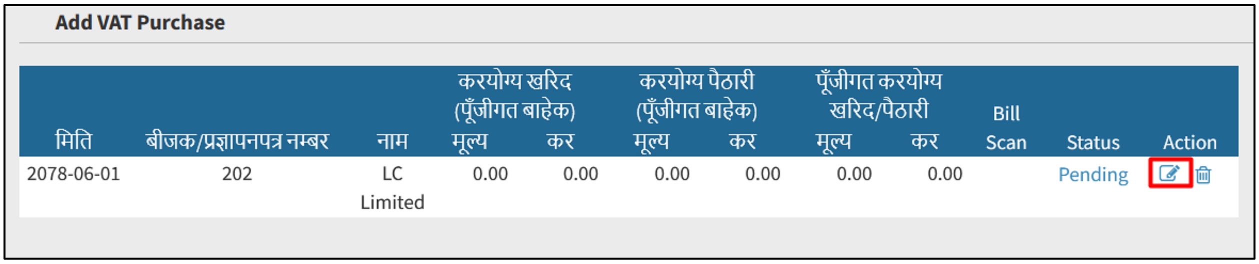


Figure: Vat Purchase Edit

11.3.1 Vat Purchase List

The saved data will be listed in **Vat Purchase List.**

1. Open **Vat Khata>>Purchase** menu. It opens the following **Vat Purchase List** page.

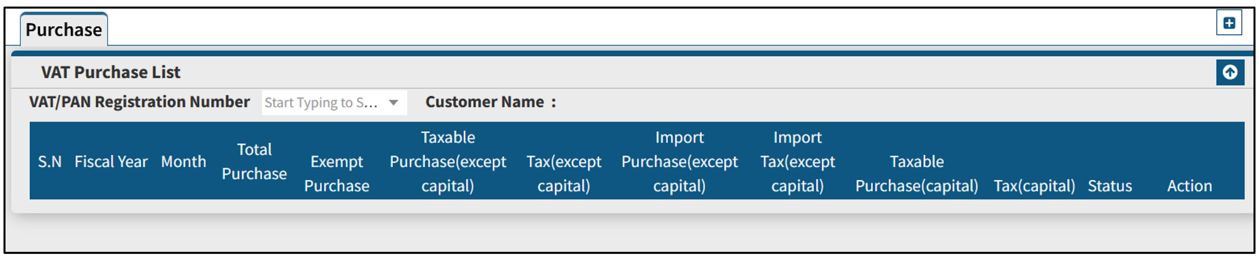


Figure: Vat Purchase List page

2. Select the **Vat/Pan Registration Number,** now the data of that customer will appear in the list. User can also export the Vat Purchase report of a particular month by click on the excel button.

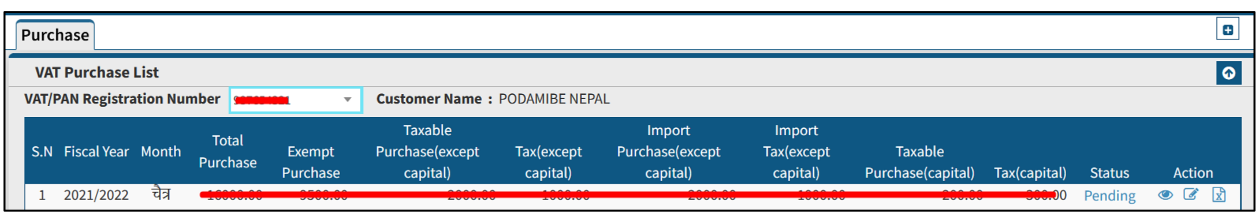


Figure 137: Vat Purchase List

3. Click the **Status**, the following popup will appear.

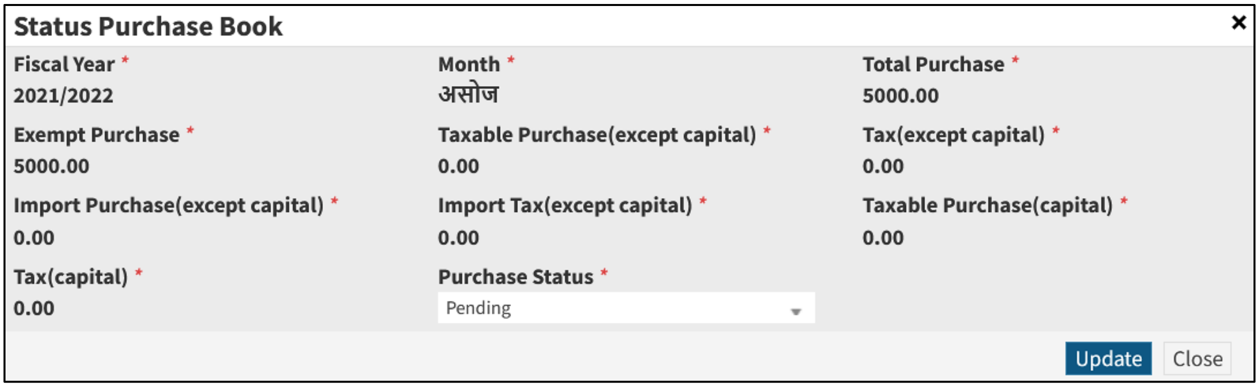


Figure: Status Purchase Book

If the status for a particular month is **Approved**, then the data for that month cannot be updated.

Note:

1. ***User can export the Vat Purchase Report for a particular month from the list, view and edit pages.***
2. ***The status can be approved by Admin only.***

11.4 Vat User Login

Follow the below steps to login as a **Vat User:**

1. Once the data is saved in the **Vat User** by an authorized person, the user will receive an email. Check your inbox for an email provided with a user and password. Click on the login link received in your email and enter the provided details i.e. **VAT/PAN** and **Password** and click the **Sign In** button.

Note: To save the Vat User, open Vat Khata>>Vat User. Go to Add Vat User page. Add data and save.

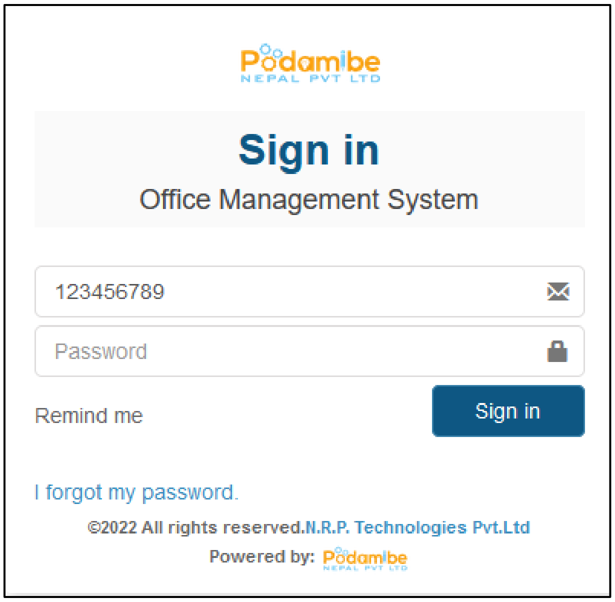


Figure: Vat Login

2. When you click on the **Sign In** button, the page will take you to the **Change Password** Page. Now the user must now change the password
3. Enter the **New Password** and **Confirm Password** and click on the **Change** button.

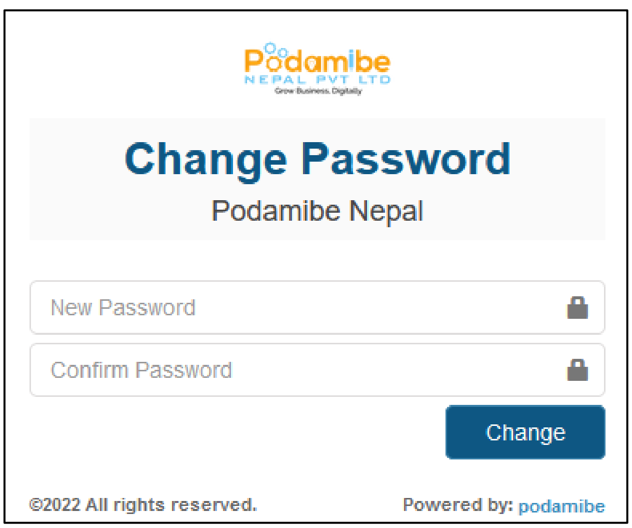


Figure: Change Password

11.4.1 Forgot Password

11.4.1.1 Steps

1. Click **I forgot my password** in the login page. It will open the forgot password page.

2. Enter your **email address** and click the **Reset** button. Check your inbox for an email with a link to the Vat application. The page will be redirected to the Change Password page.
3. Enter the **New Password** and **Confirm Password** and click on the **Change** button.

Figure: Change Password