ComplyRelax's Updates



Facility for assigning a company to team members.

You can assign specific client to your specific team members. Only those assigned members will be able to review the details regarding those particular clients apart from the administrator. This facility assists you in making a clear bifurcation of roles and responsibilities regarding your clients among your team members.

Dashboard ⇒ Clients ⇒ Edit Client ⇒ Assign Members

Figure 1

| Clients Primary Contacts | | | | O A | dd Company | • Add client | |
|------------------------------------|---------------------|-----------------------------|------------------|---------------------|----------------|--------------|-------------|
| 100 * Ø | | - Client groups - • Excel I | | Excel Print | Search | Q | Edit Client |
| Company name | Assigned Members | Client groups | Invoice Value | Payment Received | Due | = | |
| 1-0 ADVISORS INDIA PRIVATE LIMITED | | | Rs 5,900.00 | Rs 4,360.00 | Rs 1,540.00 | Edit client | |
| A AND A SPINNERS LIMITED | | | Rs 0.00 | Rs 0.00 | Rs 0.00 | | |

Figure 2

| | a 8 | | | | Reminder | 4 🛛 |
|---------------------|------------|----------------|---|--------------|----------|------------|
| | | Edit client | | | × | |
| | Clients | Client Name | | | | O Add Comp |
| | 100 | Address | TANK STRUCTORS FOR NO. SAFAAT BOOM FROM | | ri | nt Search |
| Assign Members | Compa | | | | 1. | Due |
| You can select | | Phone | Phone | | 1 | |
| multiple names from | 1-0 AD\ | Website | Website | | 00 | Rs 1,540 |
| the dropdown list. | A AND / | GSTIN | GSTIN | | | Rs 0. |
| | A DAGA | Client groups | Client groups | | . (| Rs 0. |
| | A-ONE | Assign Members | | | | Rs 0. |
| | AATAW. | | | | . | Rs 0. |
| | AAVAS I | | | X Close Save | | Rs 0. |

Private Circulation only