

Importing Compliance Tracker from PY

If you have filled data in compliance tracker for a client for any year, you can import that data for preparing compliance tracker of that client for any other financial year.

Follow these steps to use this feature:

Dashboard

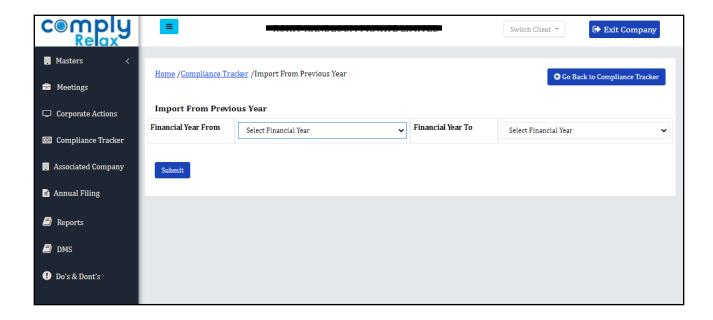
Clients

Select Client

Compliance Manager

Compliance Tracker

Import from PY



Select the *FY from which* you wish to import and *FY to which* the compliance tracker should be imported.

All the details will be copied and you will have to make necessary changes accordingly.