USER MANUAL

A GUIDE TO ACCESS THE FEATURES OF COMPLY RELAX DASHBOARD

As updated on: 10/02/2021

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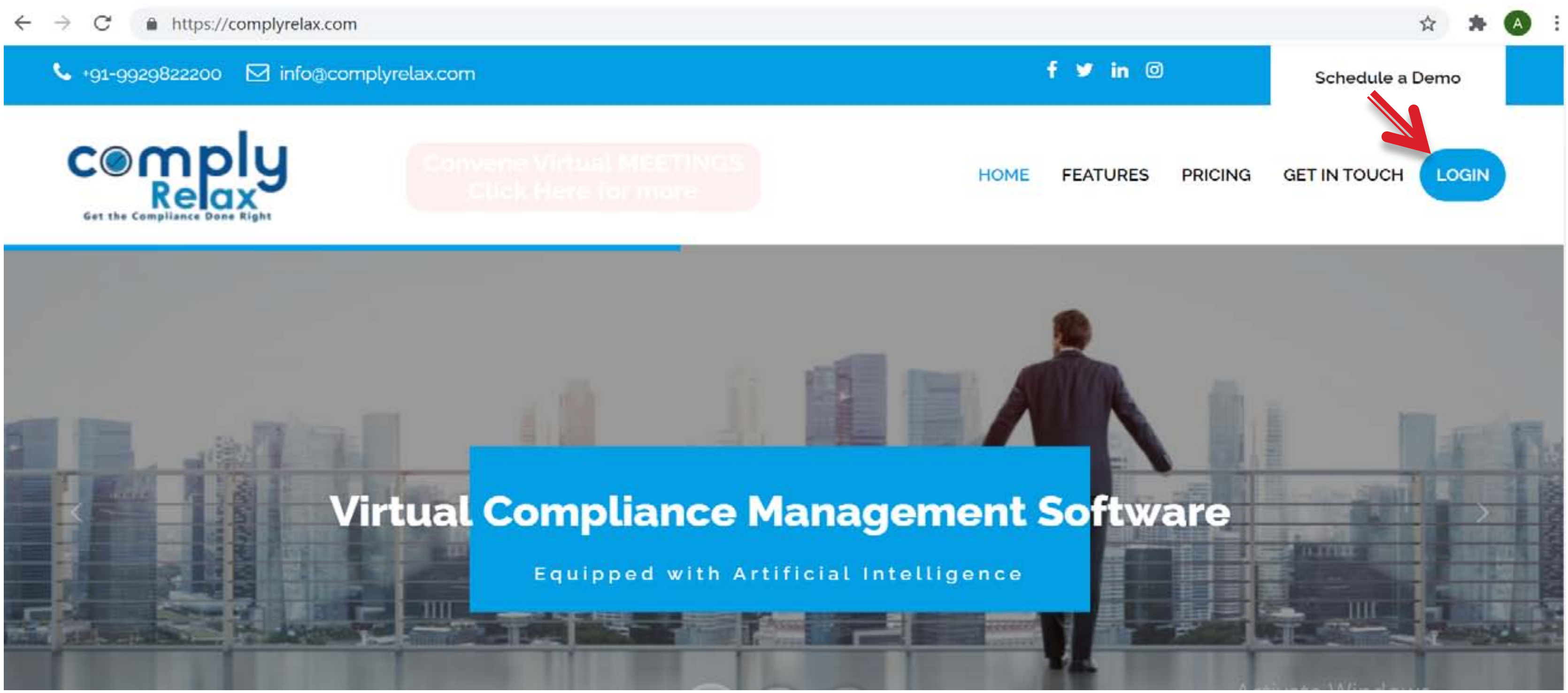
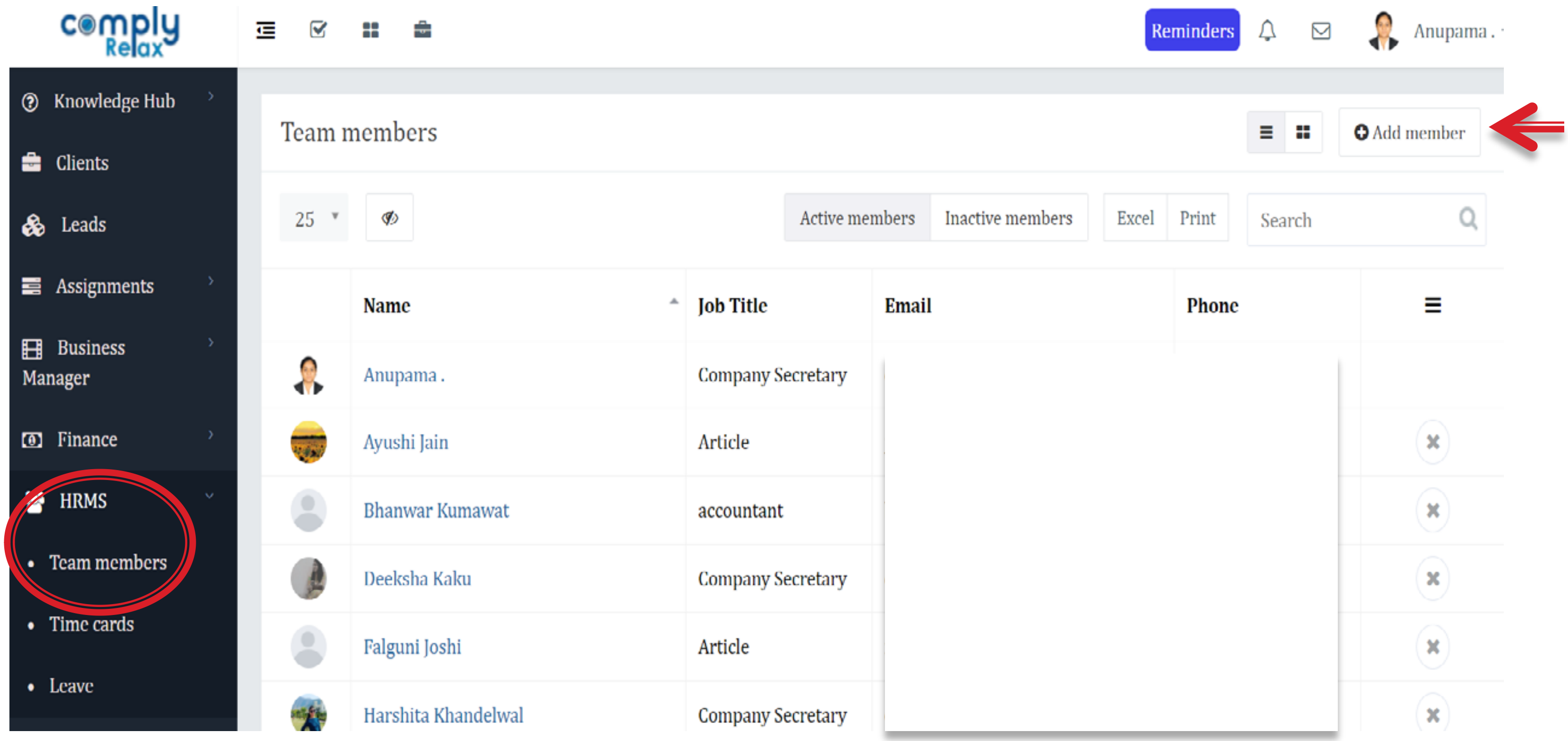
Login Process



Steps: Click > **Login** button on the website as shown in the picture > Enter login credentials and press login.

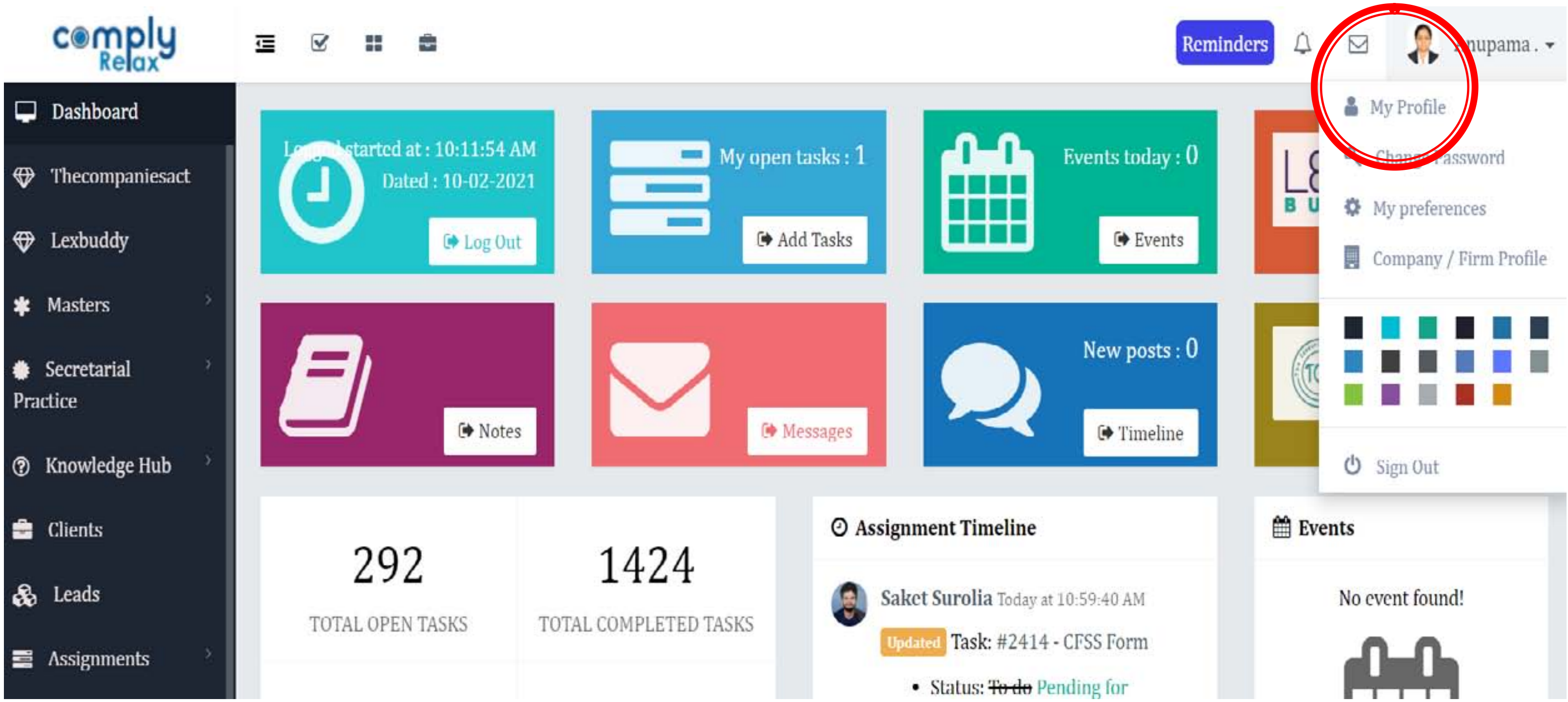
New Users: Click > **Sign Up** and enter the details to create a new login ID.

Adding Team Members



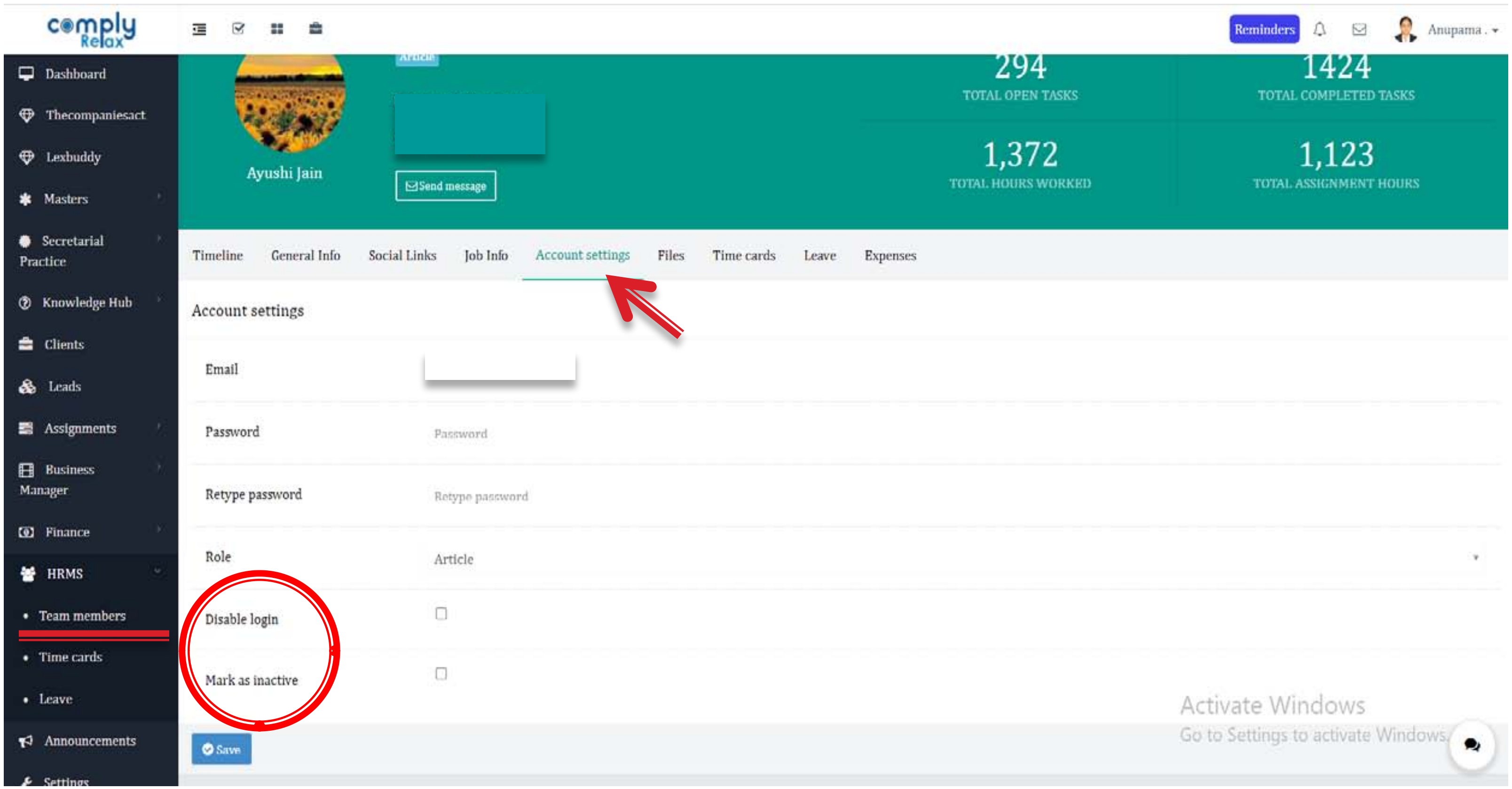
Steps: Click > **HRMS** tab from the list at the left side panel, select > **Team Members** > **Add Member** button on right corner of the window and fill the required details of the person you wish to add as team member.

Profile Updation



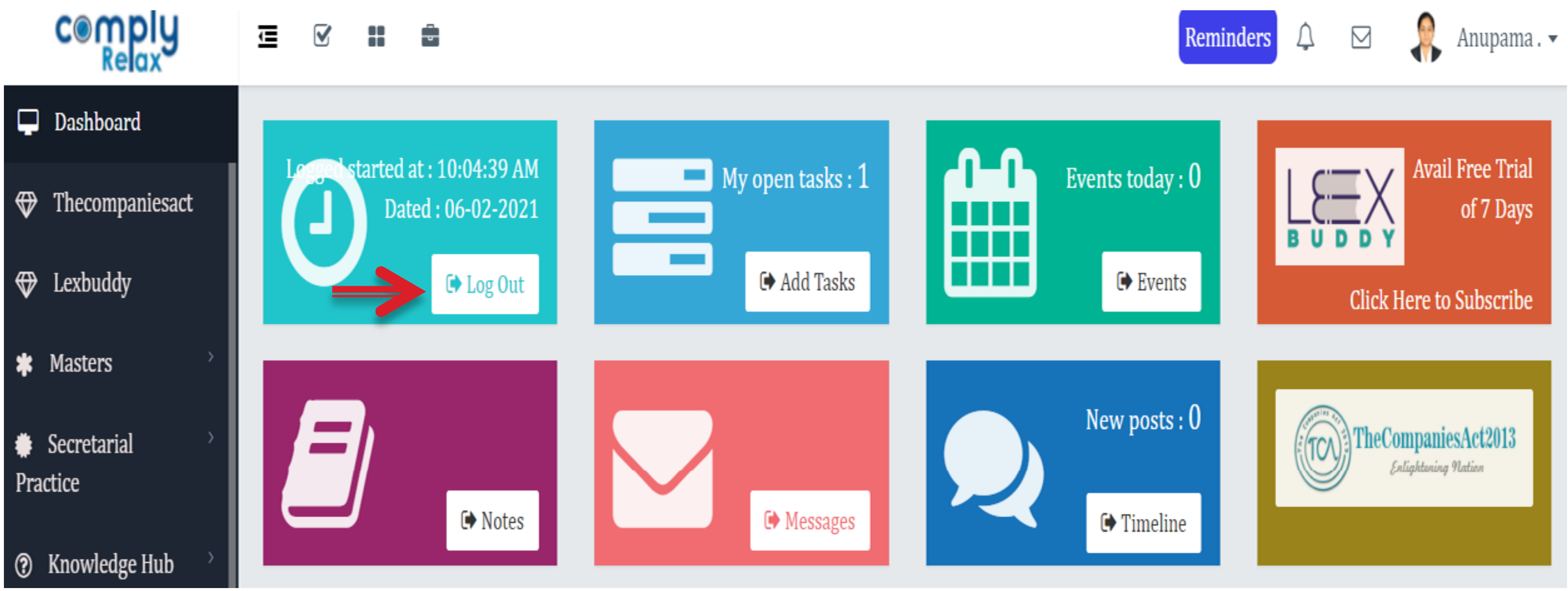
Steps: Click > account holder’s **name** displayed on right corner of the window and then select > **My Profile** option > Make the desired changes.

Deleting or Marking Team member Inactive



Steps: Click on the tab **HRMS** > **Team Members** > **Name** of member > **Account Settings** > **Delete/Mark inactive** and click > **Save** button.

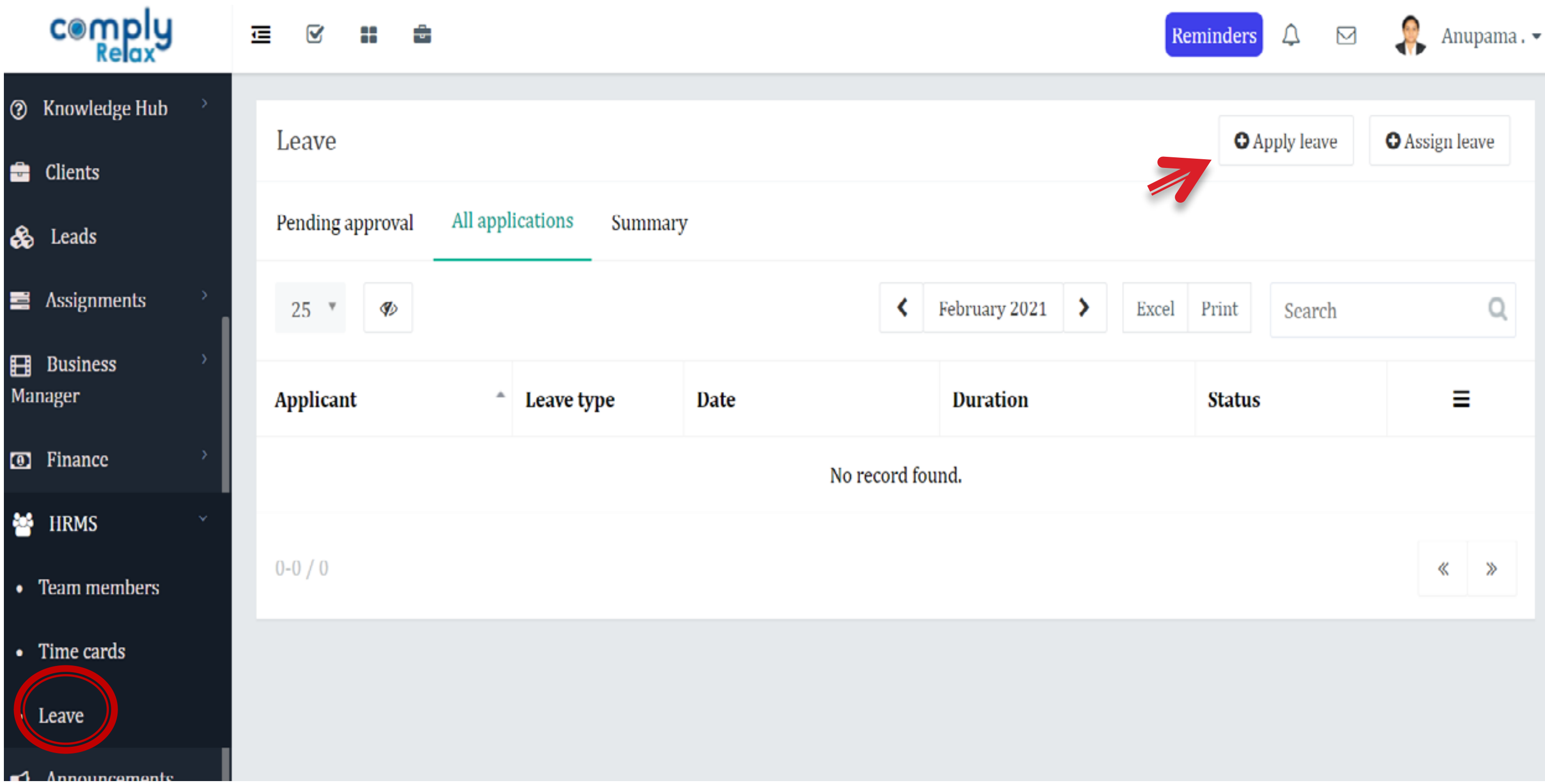
Managing Attendance



Steps: Click > **Log In/ Log Out** tab on the main dashboard to punch in attendance .

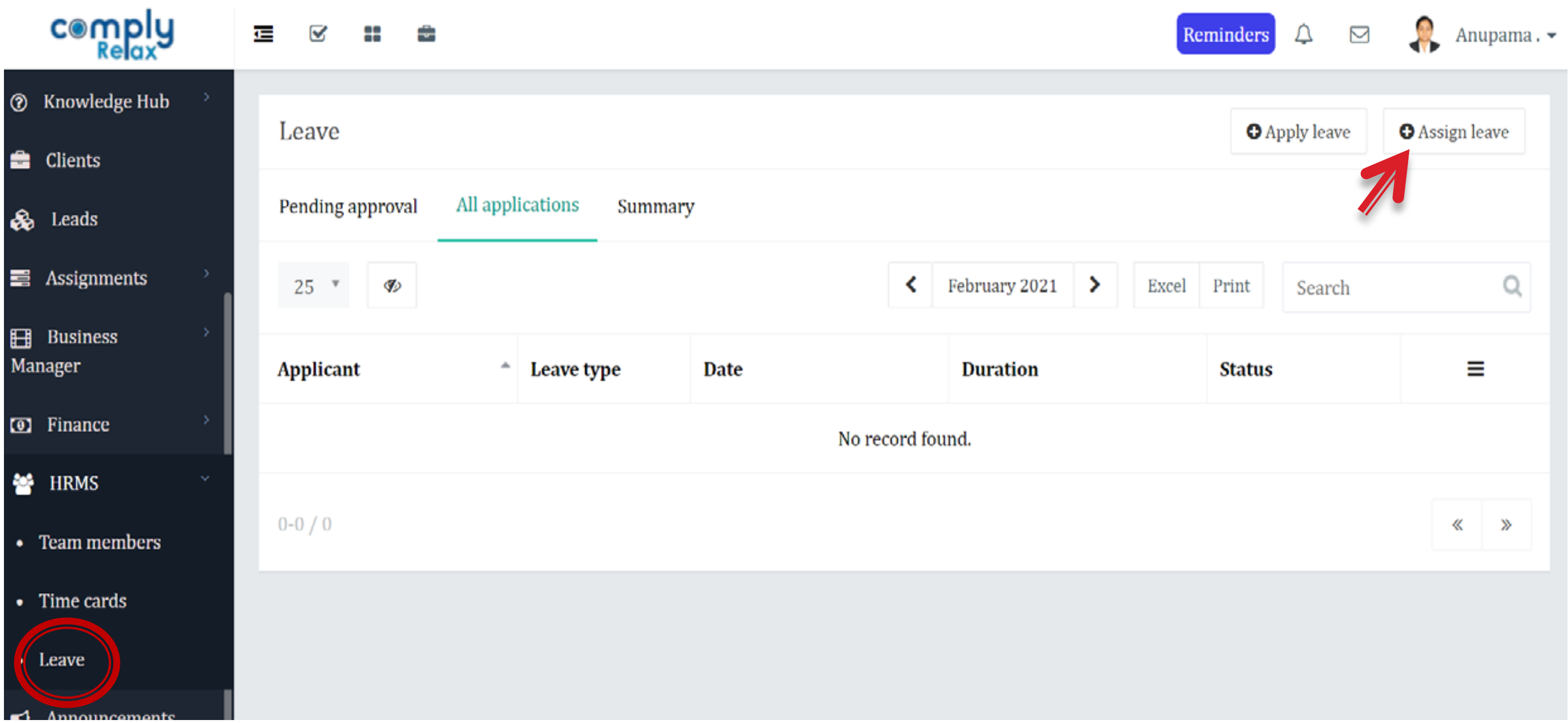
To check Log In Time, Log Out Time and Duration of team members click > **HRMS** tab and select **Timecards**.

How to Apply for Leave ?



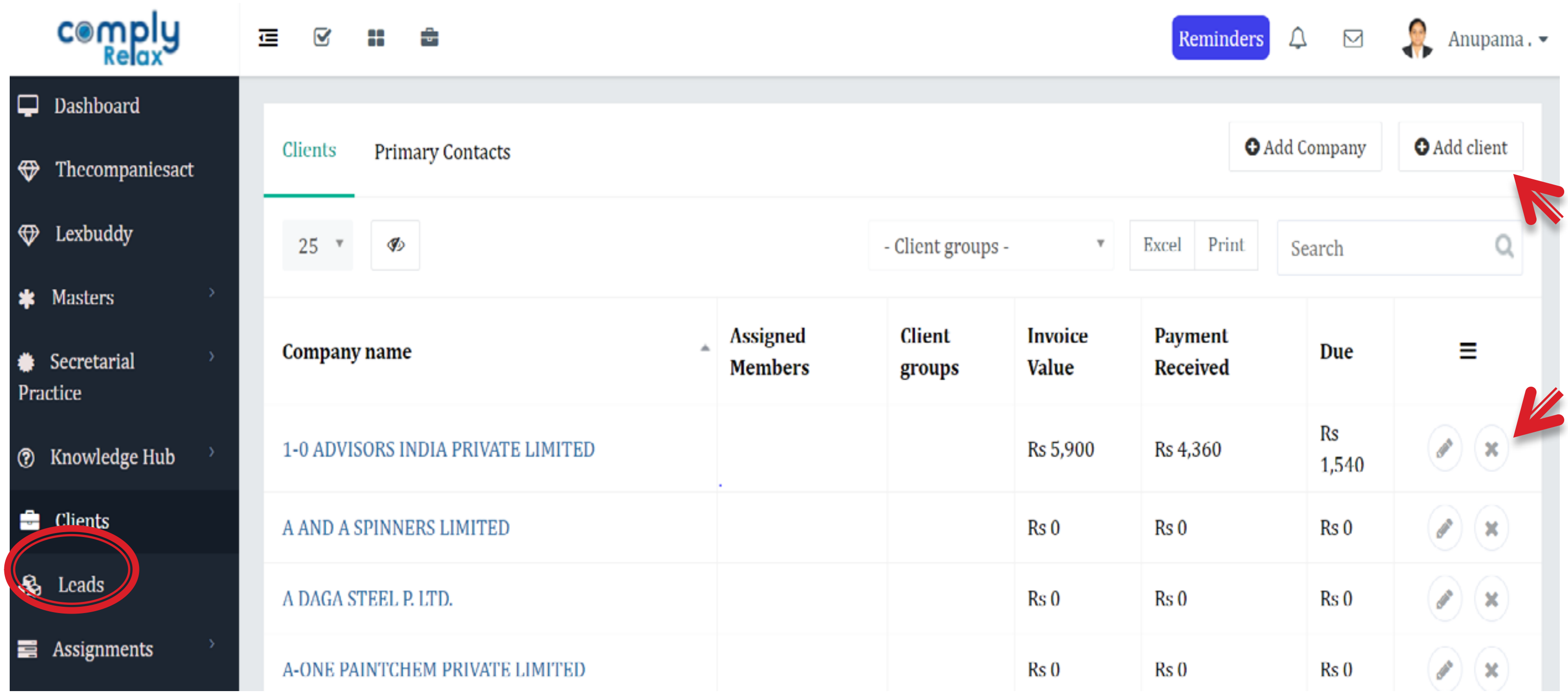
Steps: Click > **HRMS** > **Leave** > **Apply leave**

How to Approve Leave



Steps: Click > **HRMS** > **Leave** > **Assign Leave** and fill in the details

Add or Remove Client

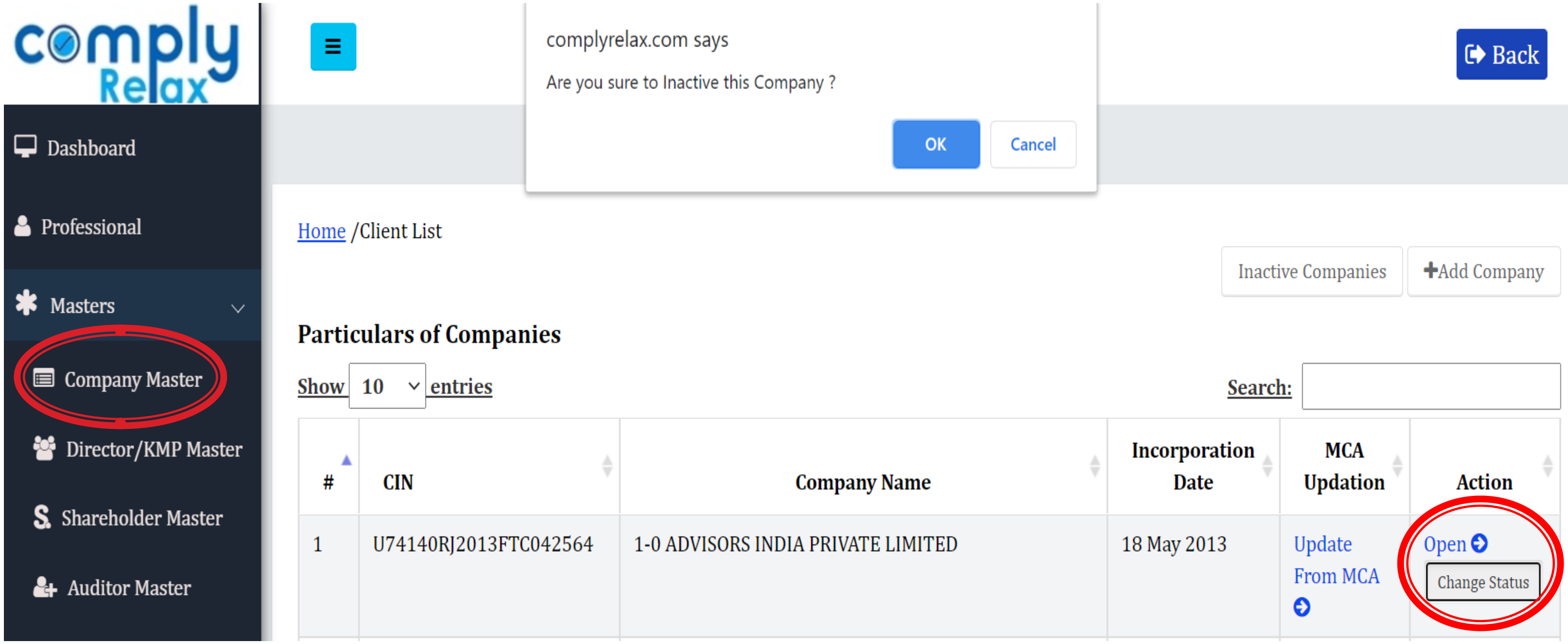


Steps:

To **Add**:- Click > **Clients** > **Add Client / Add Company**, Fill in **CIN**/details as required and click on **save** button.

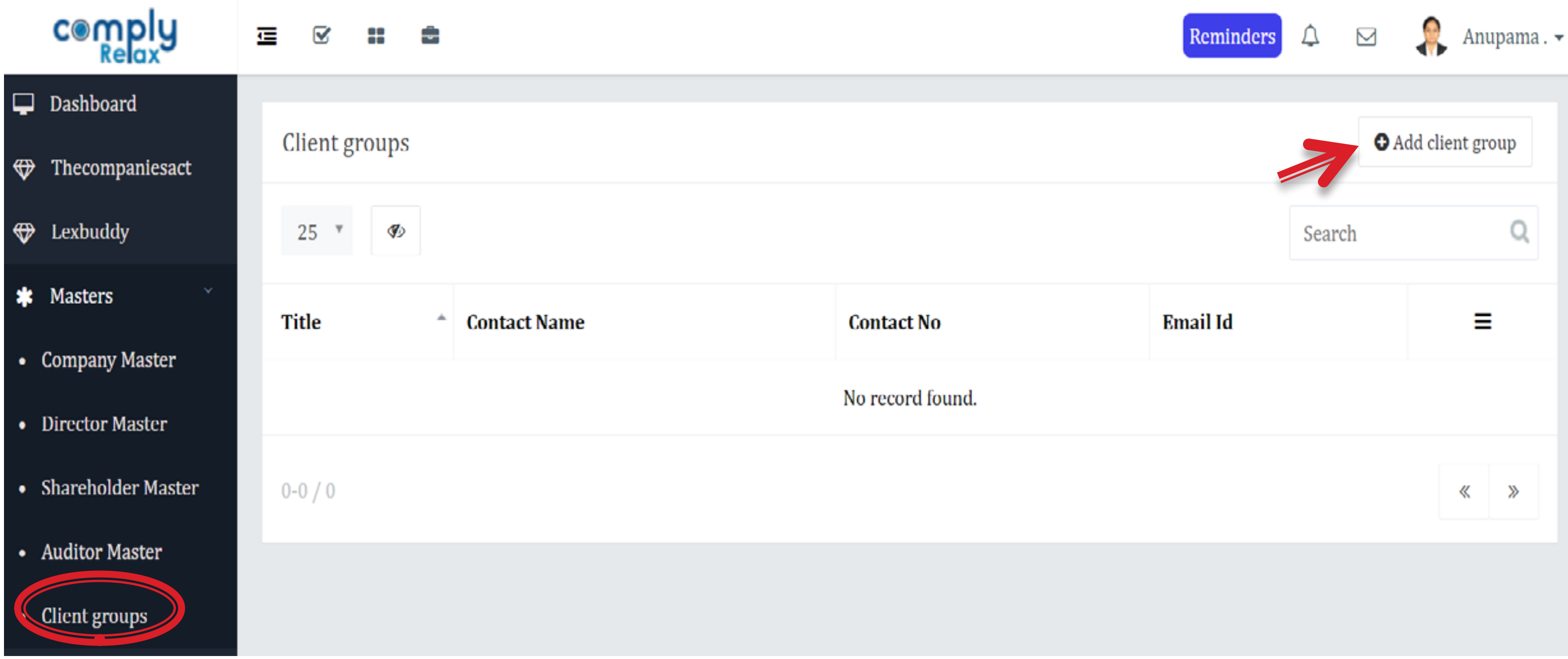
• To **Remove** :- Click > cross sign seen in front of name of the client

Marking Client Inactive/Active



Step 1: Click > **Masters** > **Company Masters >** Search the name of Client/Company in the list, Click > **Change Status** and select the desired option.

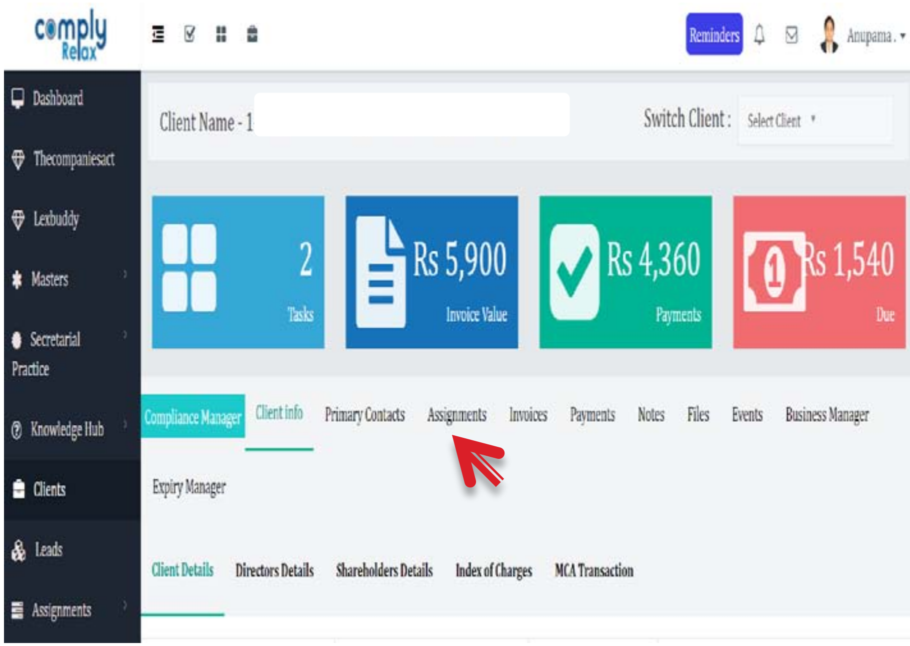
Adding Client Groups



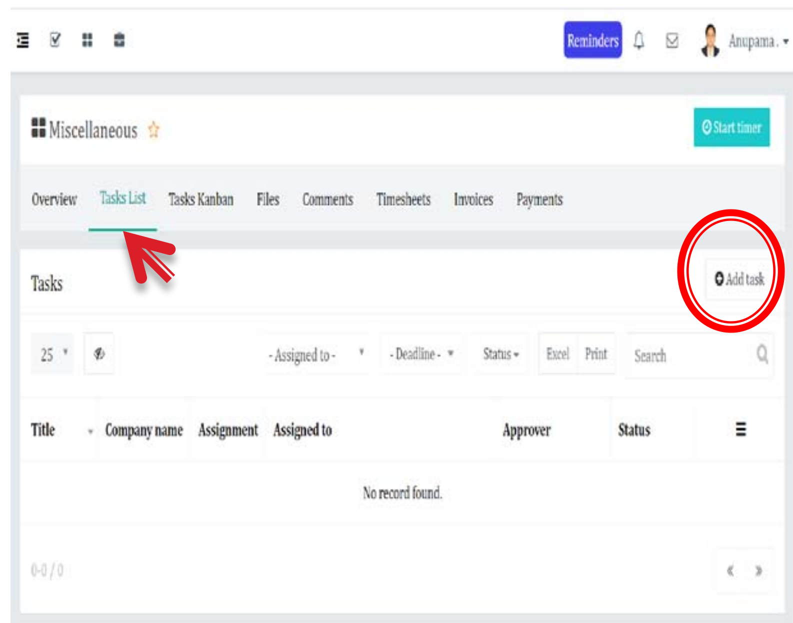
Steps: Click > **Masters** > **Client Groups > Add client group**.

Adding Tasks

A

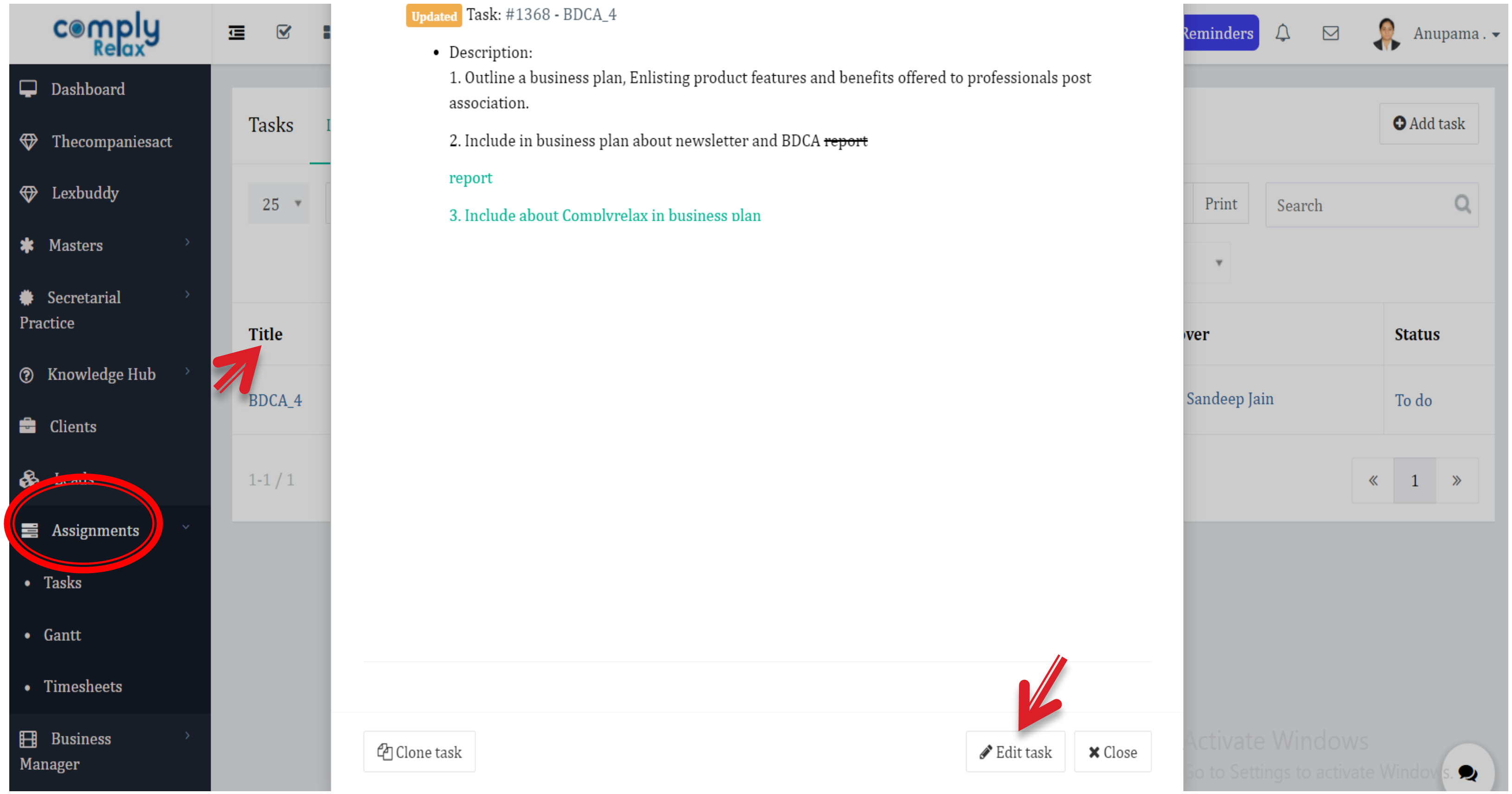


B



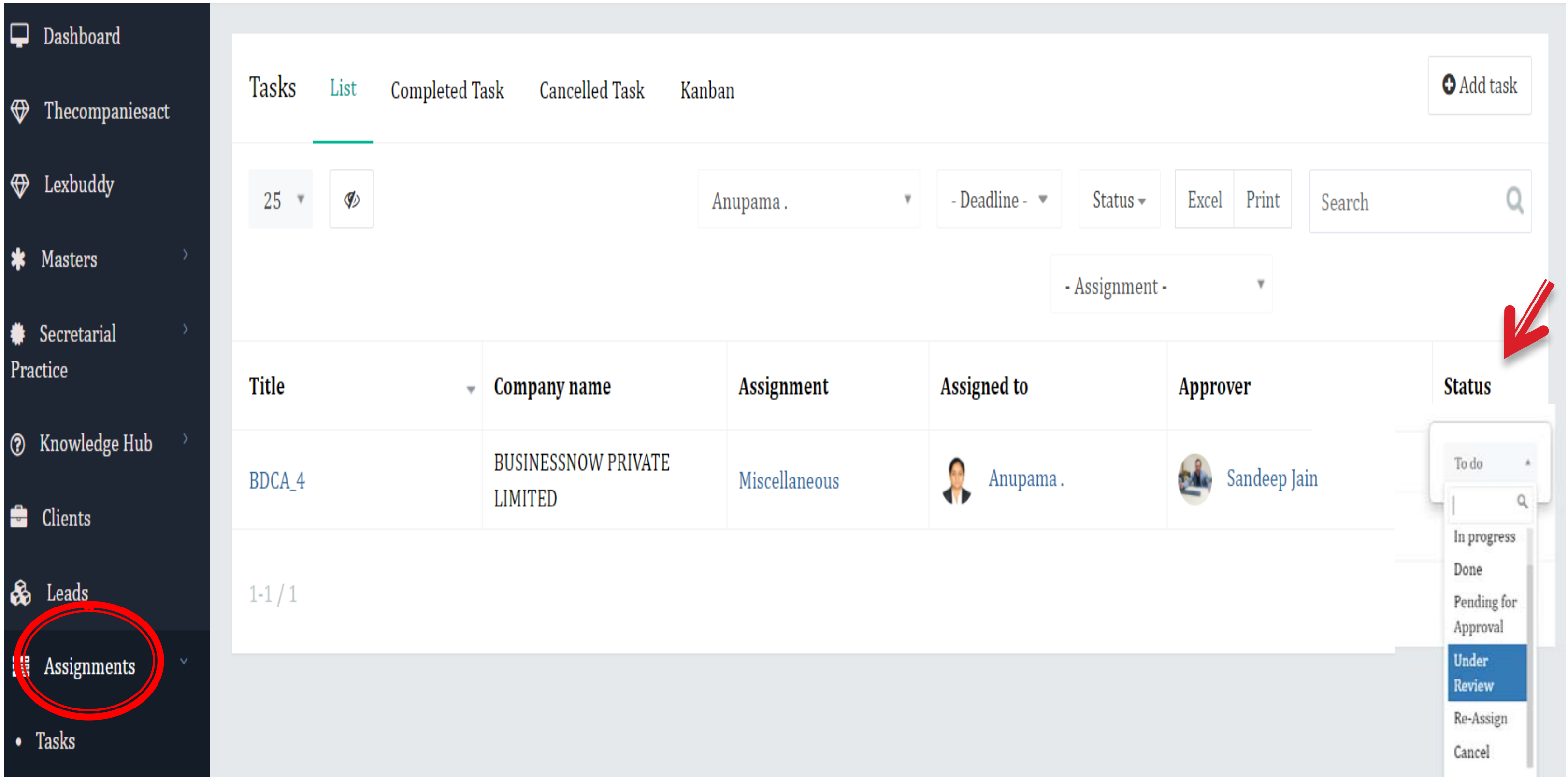
Steps : Click > **Clients** > select **Name of Company** > Go to **Assignments** as shown in Fig. A. > choose the assignment **Title** > **Task List** > **Add Task** as shown in Fig. B.

Editing Task



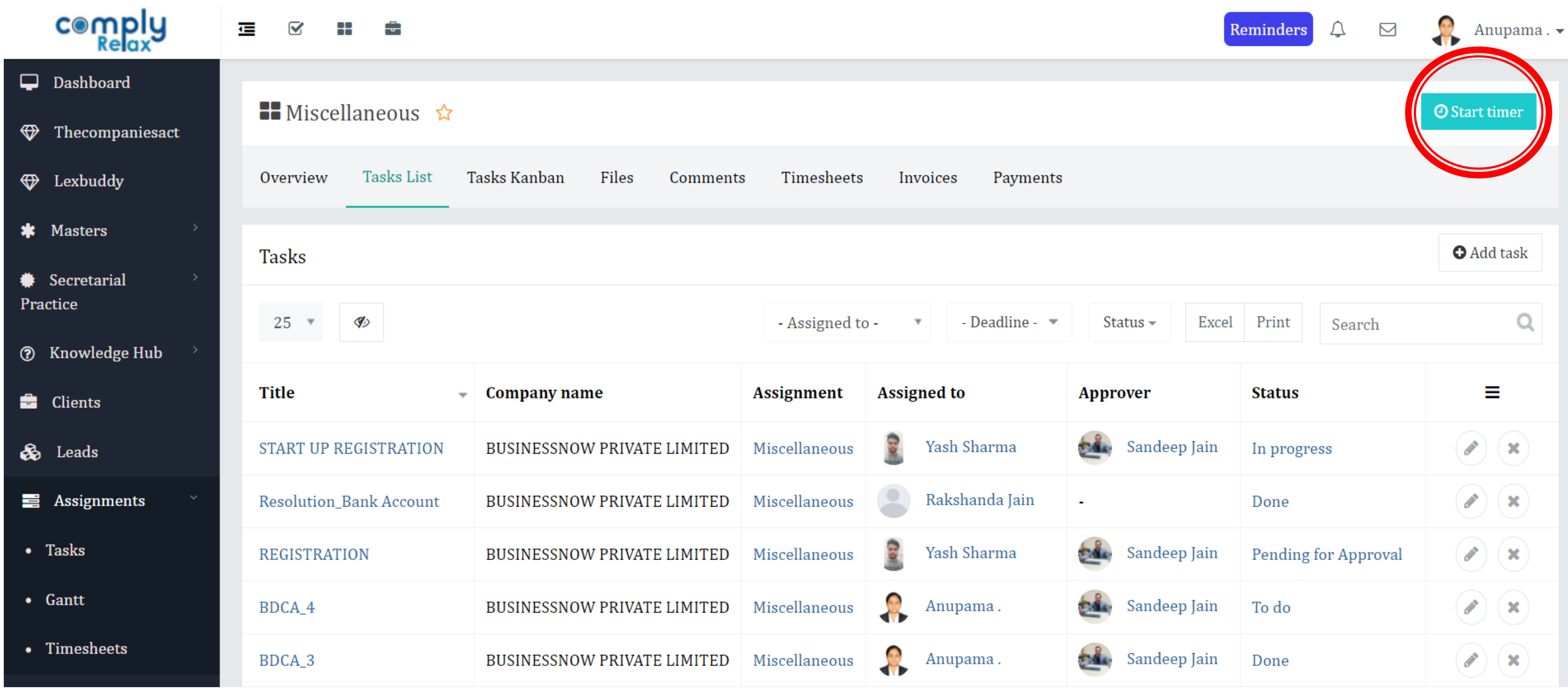
Steps: Click > **Assignments**, > Select the **Title** of task, > Click on the **pencil shaped** button to Edit the task and make the required changes.

Updating Task Status



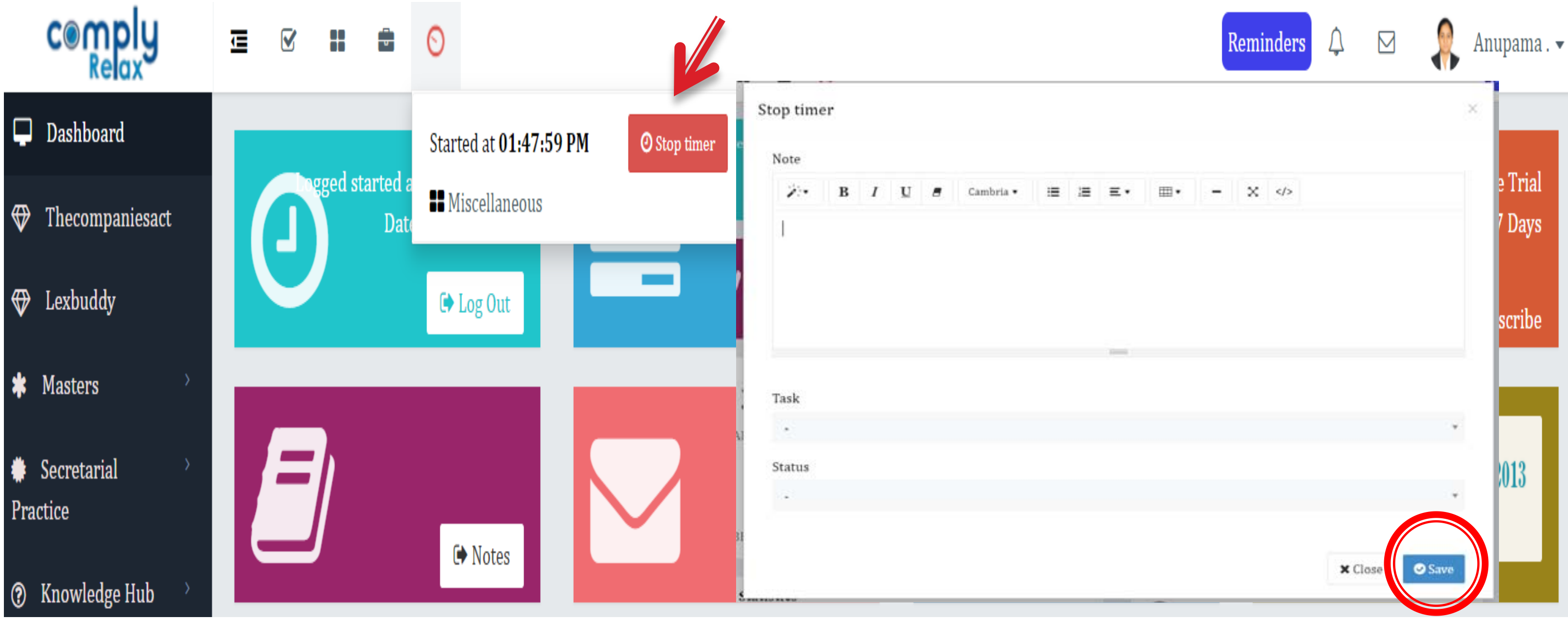
Steps: Click > **Assignments,** Go to the relevant **task** from task list, > Click on the current status > update status from dropdown list.

How to Start Timer?



Steps: Click **Assignments** > Choose **Assignment Title** > **C**lick on **Start Timer** button at top right corner.

How to Stop Timer ?

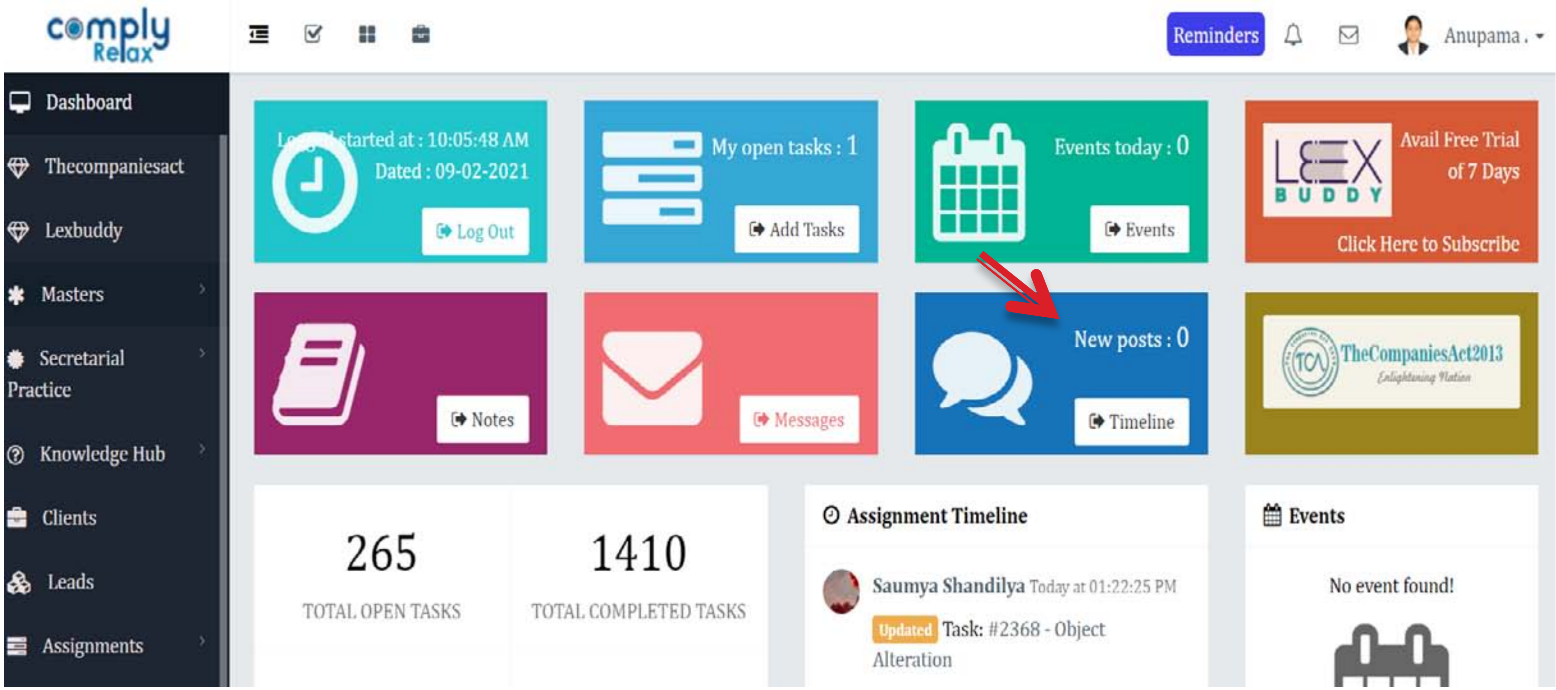


Step 1: On the main dashboard, a **Clock Sign** will be displayed if timer is on, click on that button

Step 2: Click > **Stop Timer** button, a small window will be pop up

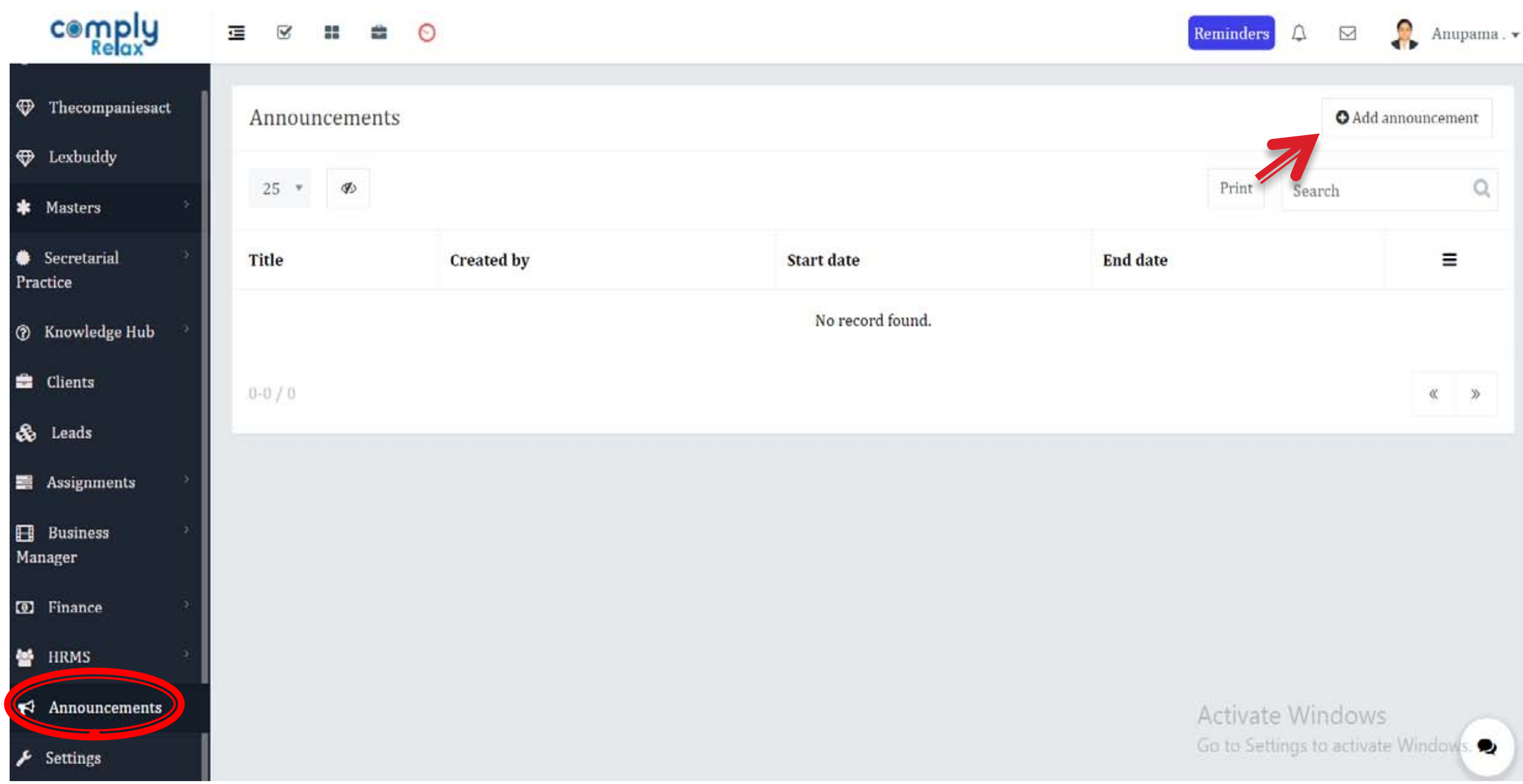
Step 3: Click on > dropdown arrow, **select** > the **task** you wish to stop timer for and add comments (if any) then click > **save** button.

Adding New Post



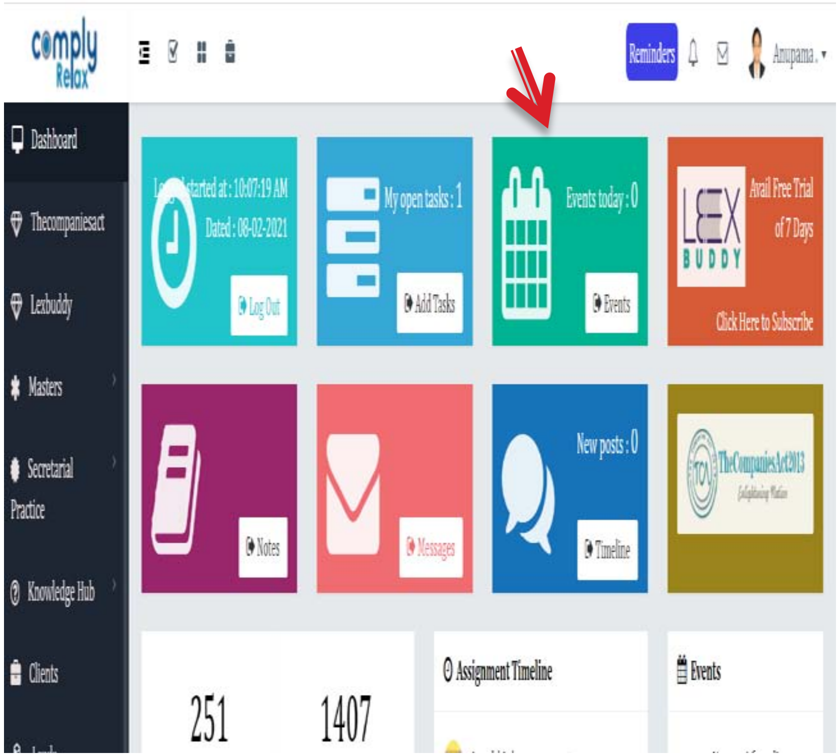
Step : Click on **New Post** tab > write the post > Click on **Post.**

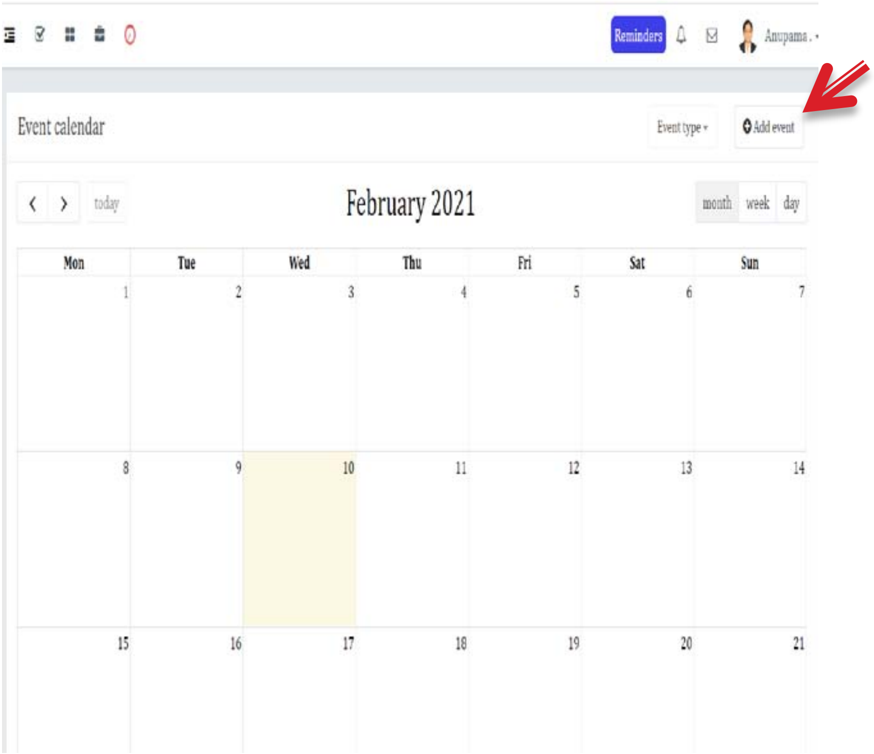
How to make Announcements?



Steps: Click > **Announcements** >**Add Announcement >** Give a Title, Fill all the necessary details > **Save.**

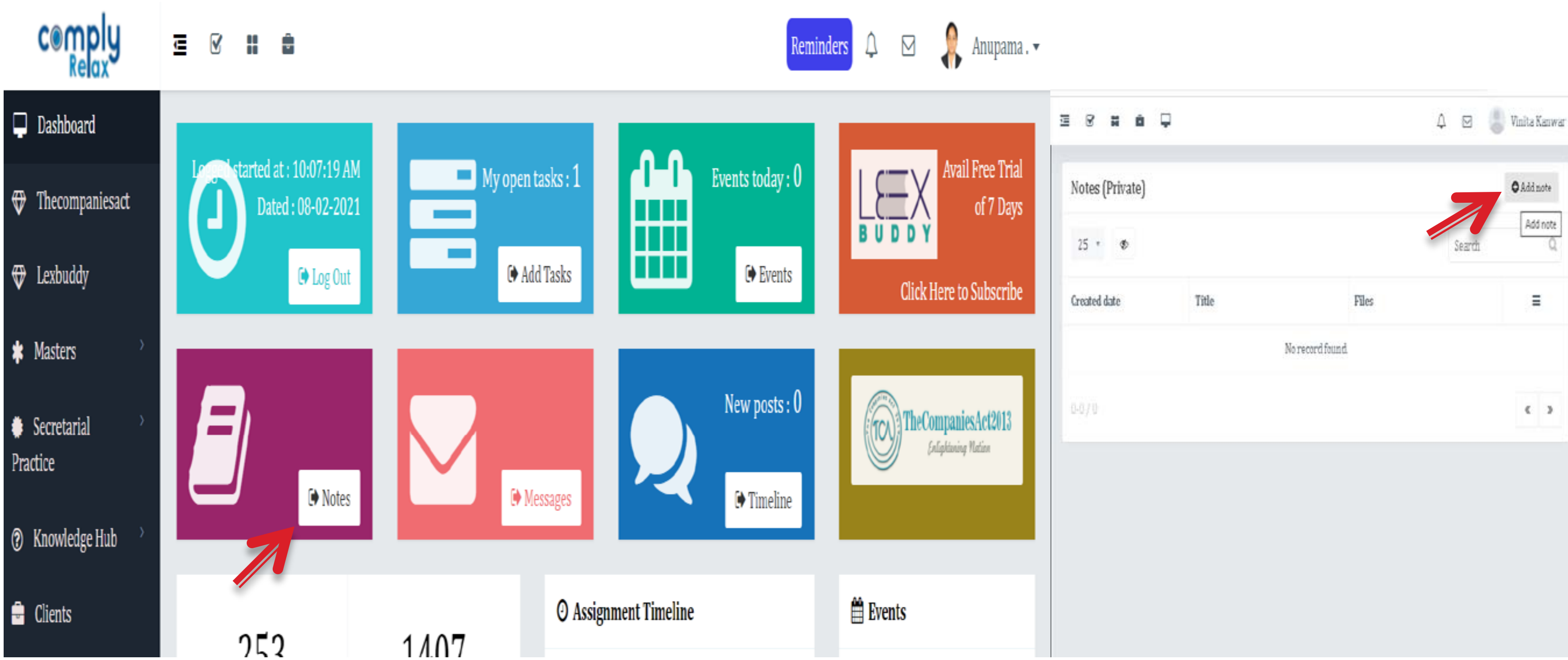
Adding Event





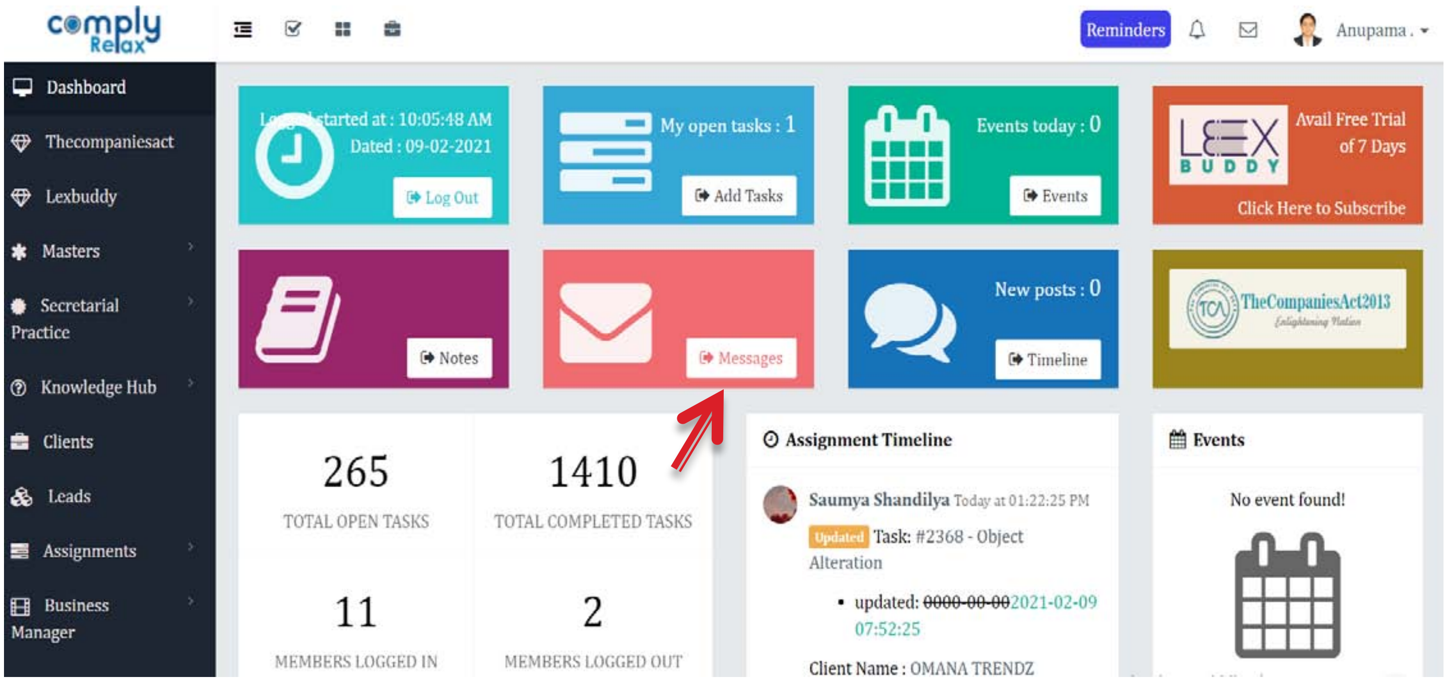
Steps: Click > **Events** tab > **Add Event** button on right corner of the window and fill the required details, Click > **Save**

How to Add Notes ?



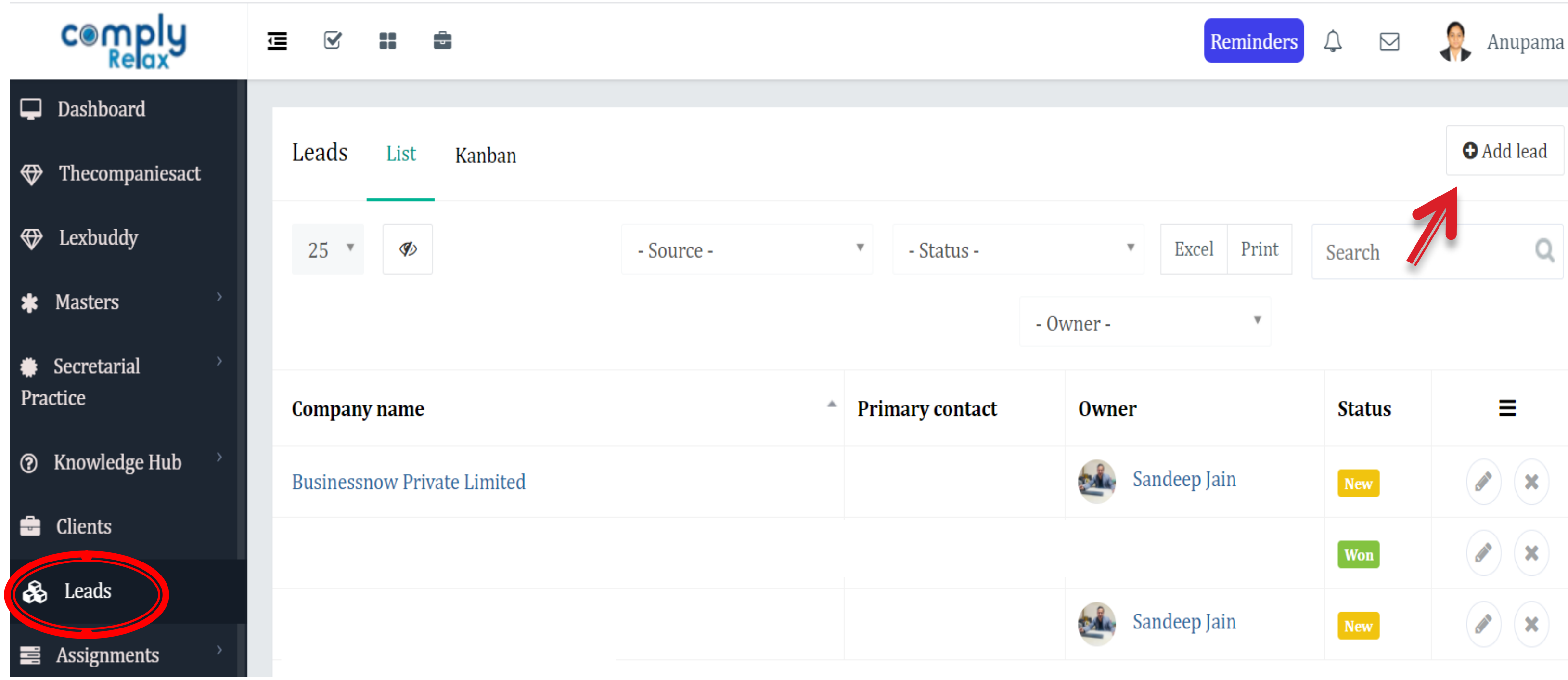
Steps: Click on > **Notes** > **Add Notes** button on right corner of the window and fill the required details > Click **Save**.

Messaging



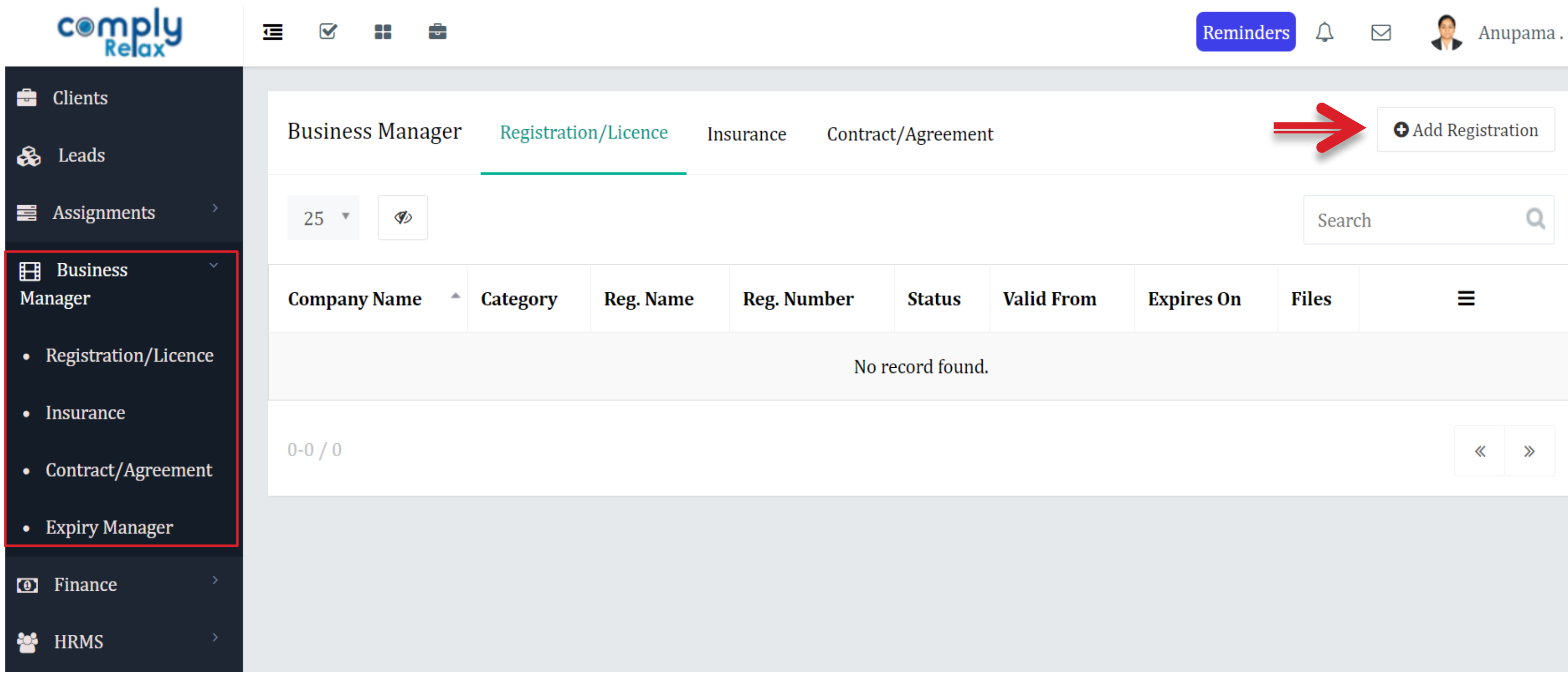
Steps: On the dashboard Click on > **Messages** > **Compose message, Attach files** and **Send**

Adding Business Leads



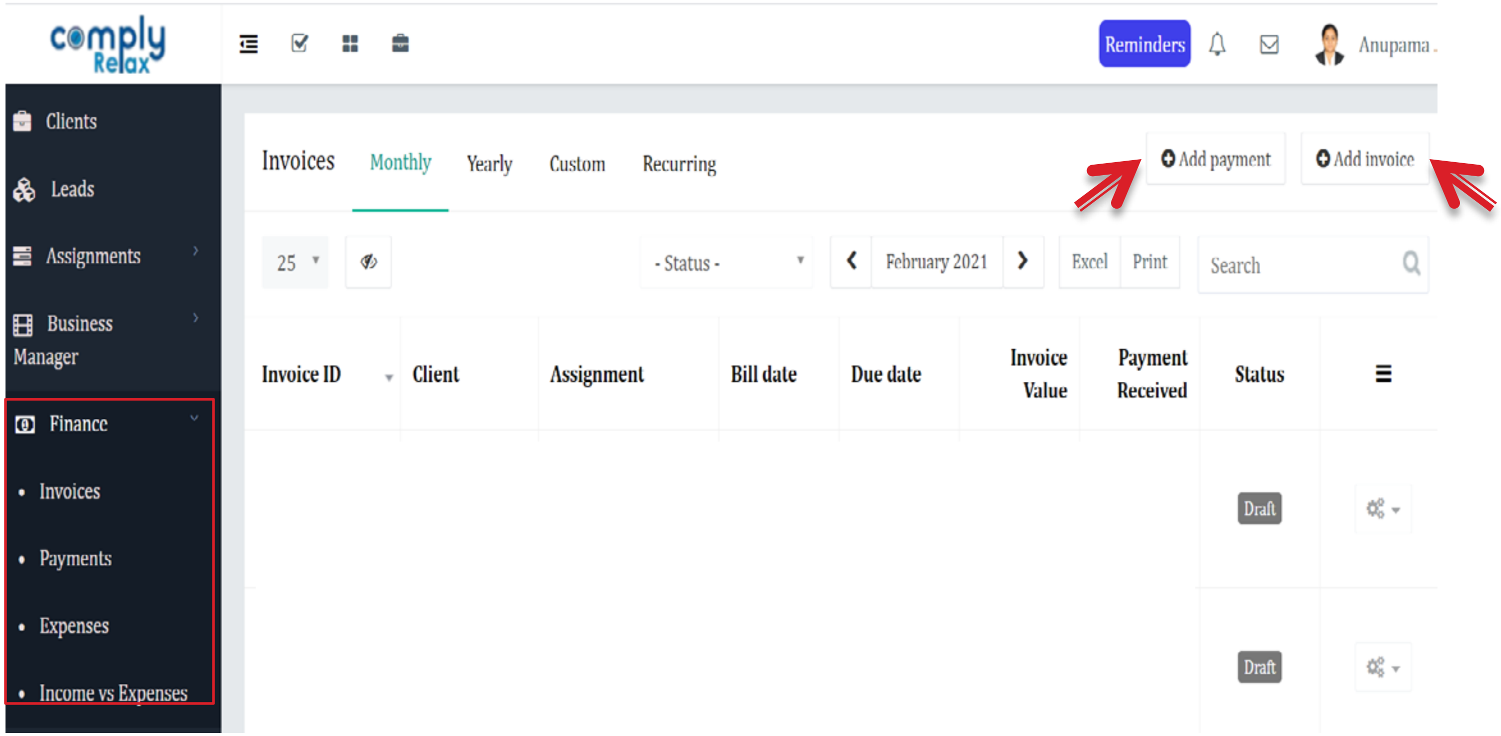
Steps: On the dashboard Click > **Leads** > **Add Lead** > **Enter details and save**

Adding Registrations, Contracts, Insurance



Steps: On the dashboard Click > **Business Manager** > **Registrations/Insurance/Contracts** > **Add Registrations**

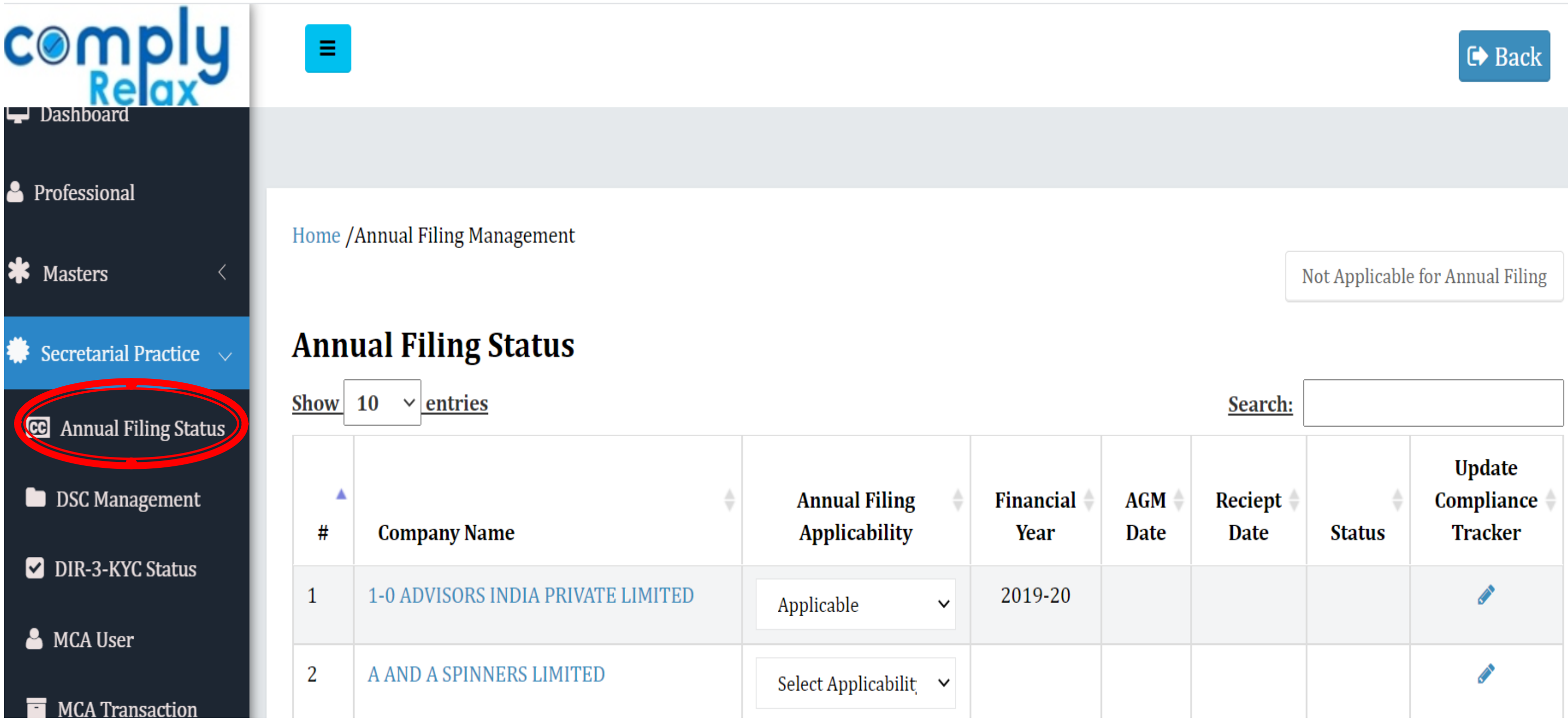
Add Invoices, Payments



Steps: For Invoices: Click > **Finance** > **Add Invoices** > **Update Invoice setup, Update firm's Profile** (one time) > Fill details of invoice and save

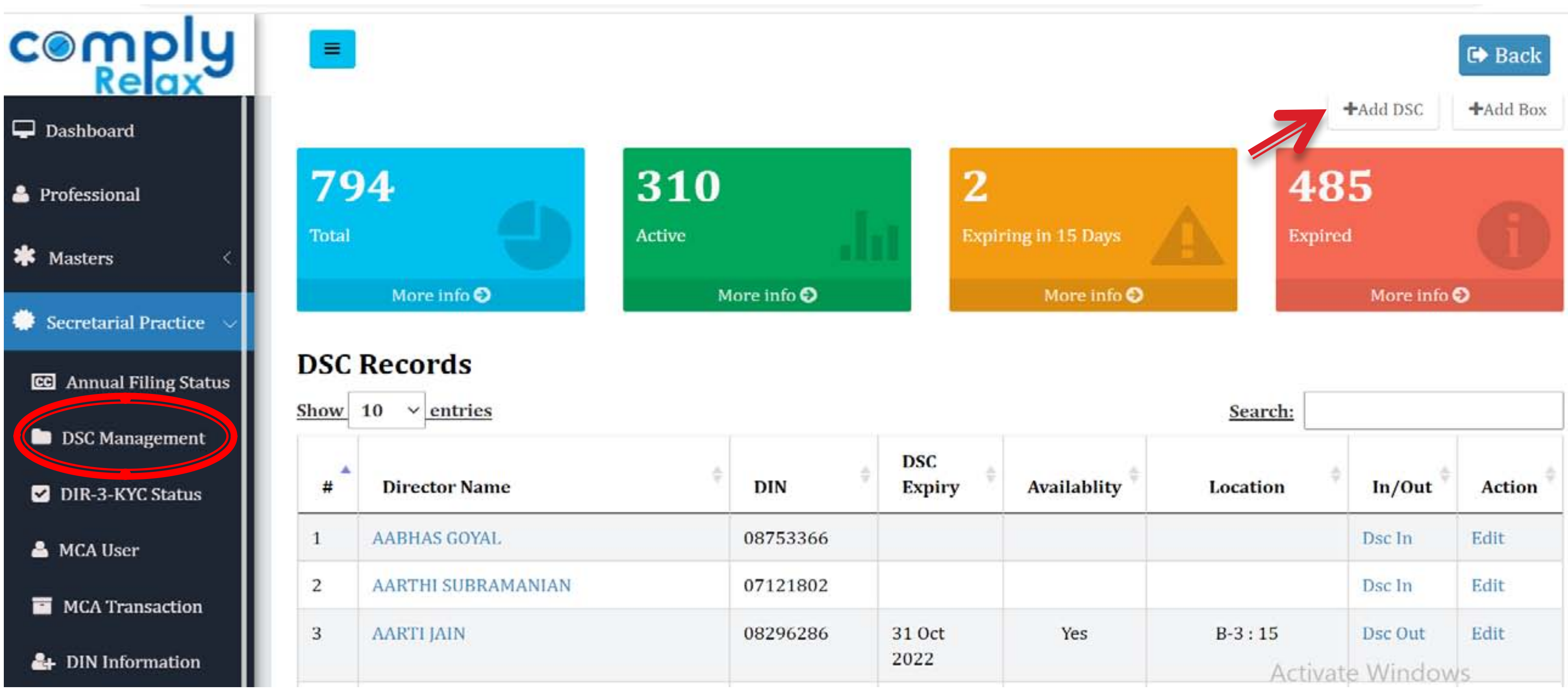
To Add Payments: **Click > Finance > Add Payments >** Fill and save details

Updation of Annual Filing Status



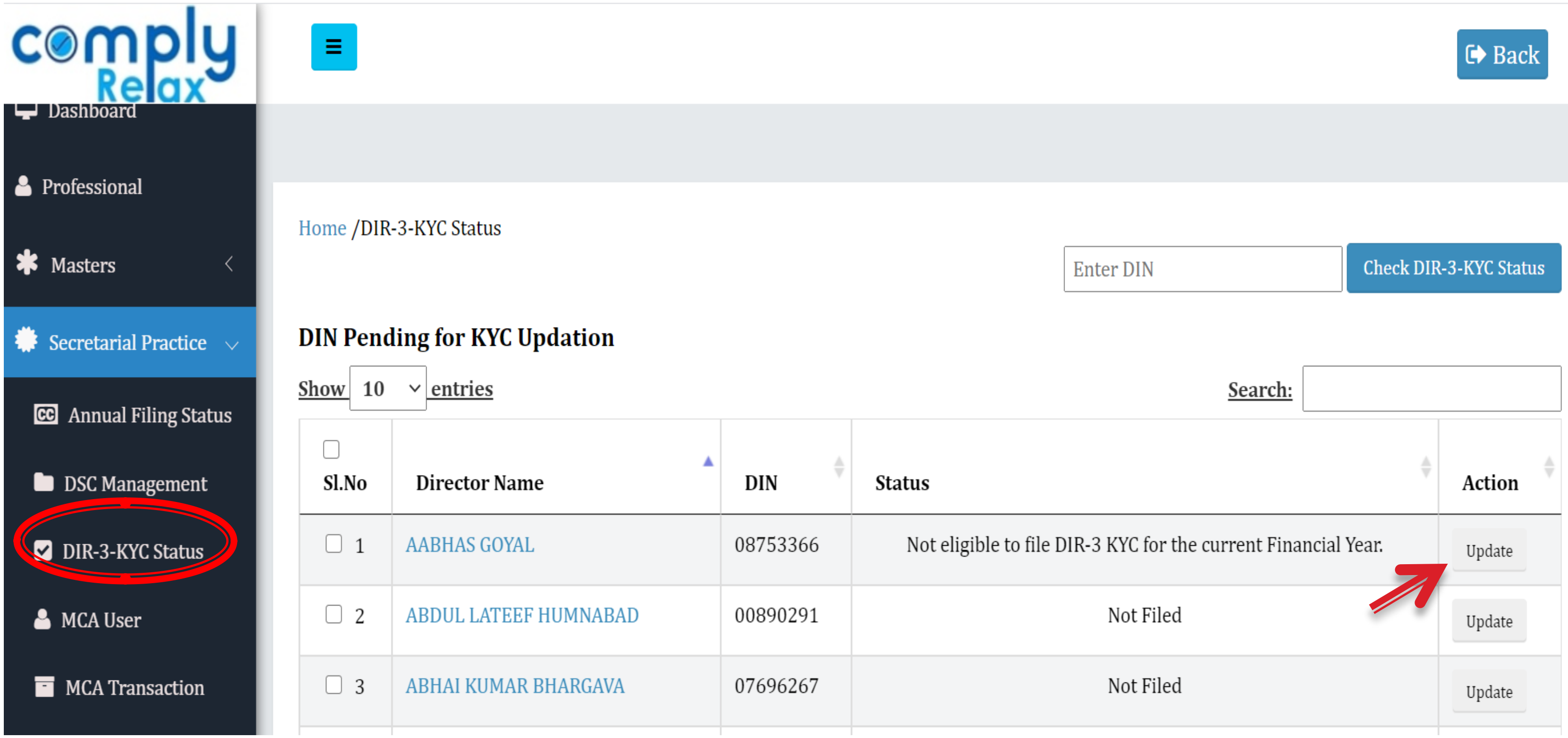
Steps: On the Dashboard Select > **Secretarial Practice > Annual Filing Status> Update** Annual Filing Status for the companies.

DSC Management



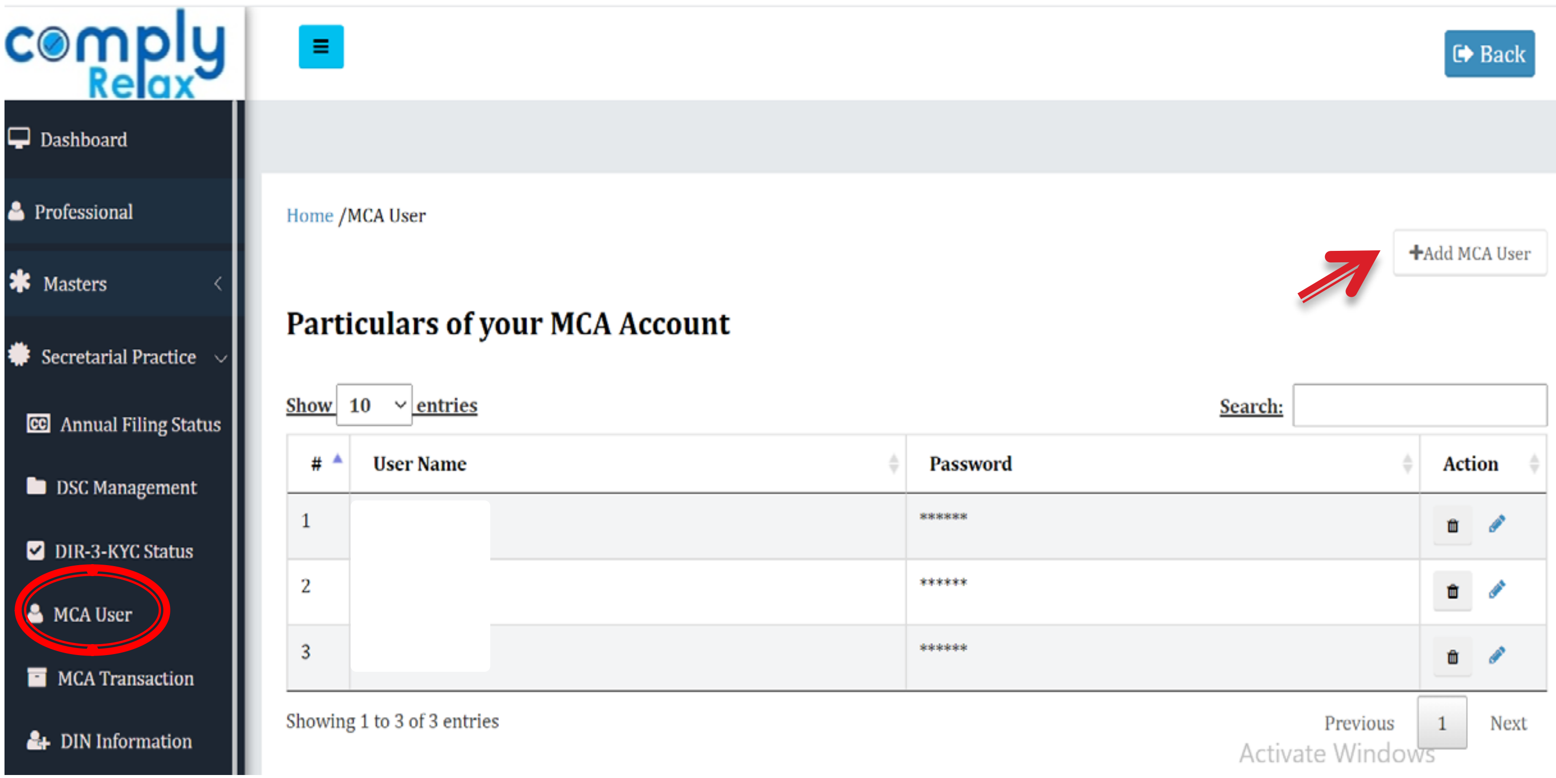
Steps: On the Dashboard Select > **Secretarial Practice > DSC Management > Add DSC /Update** the DSC Status.

Updation of DIR-3 KYC Status



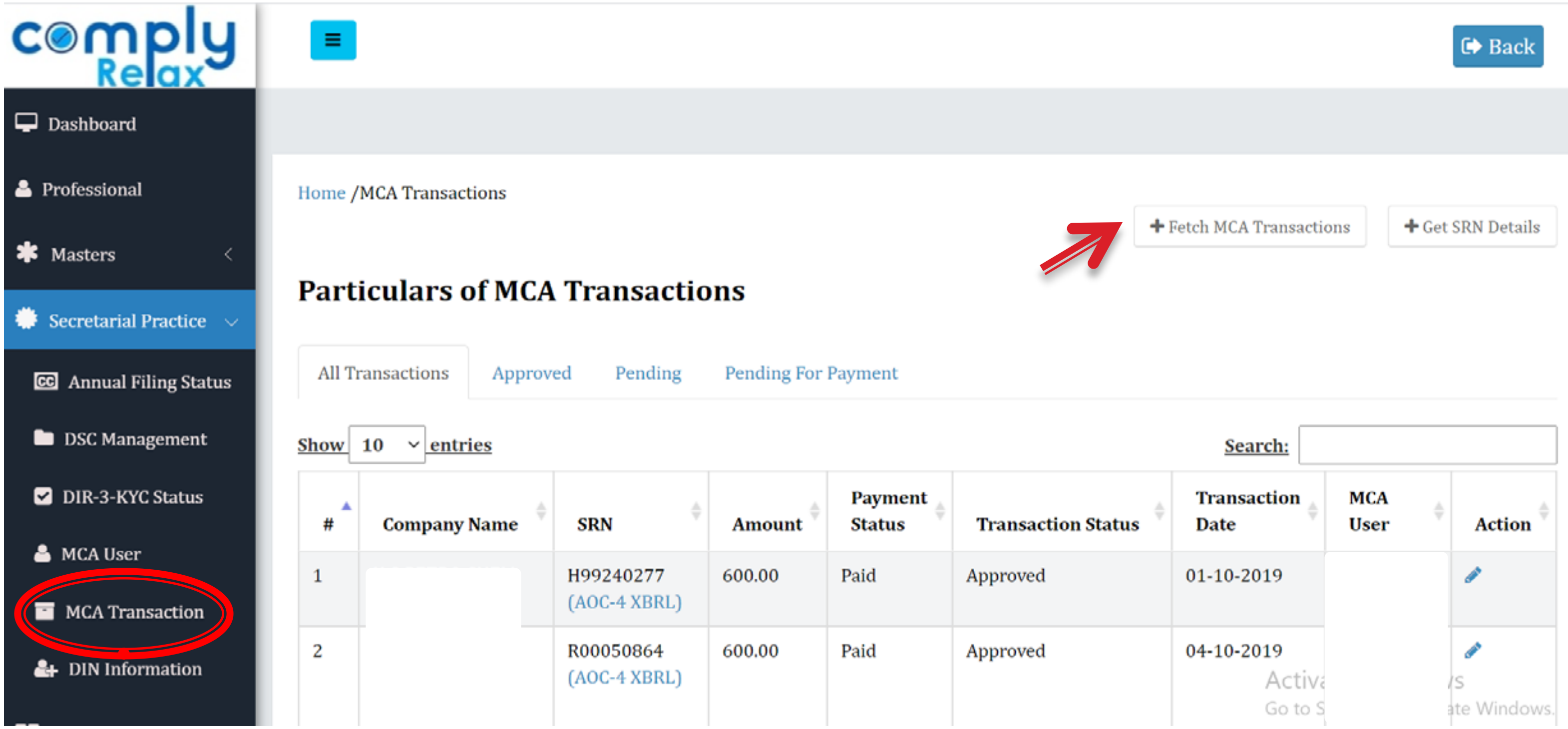
Steps: On the Dashboard Select > **Secretarial Practice > DIR-3 KYC Status > Update** (Auto update from MCA).

Add MCA User Account



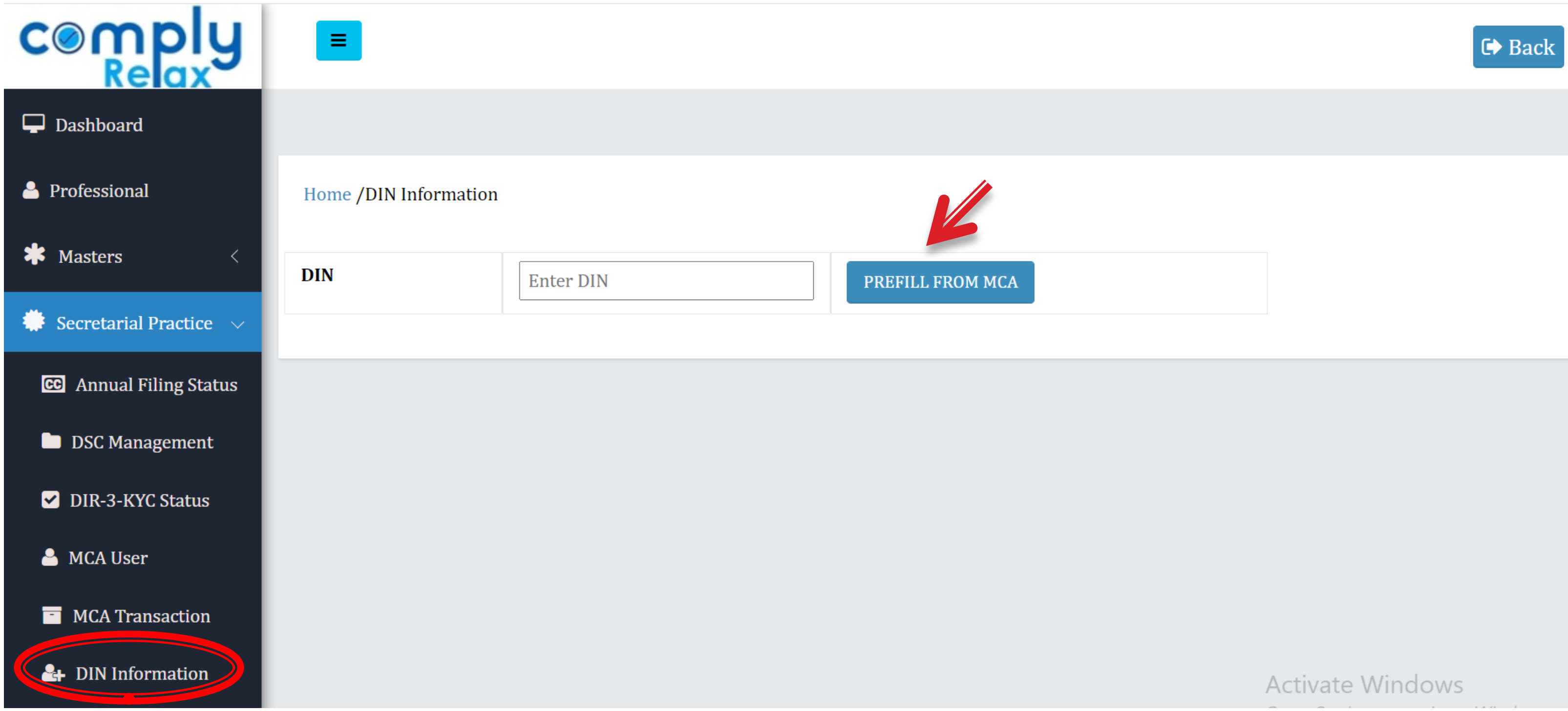
Steps: On the Dashboard Select > **Secretarial Practice > MCA User > Add MCA User > Enter Particulars and Submit**

Fetch MCA Transactions



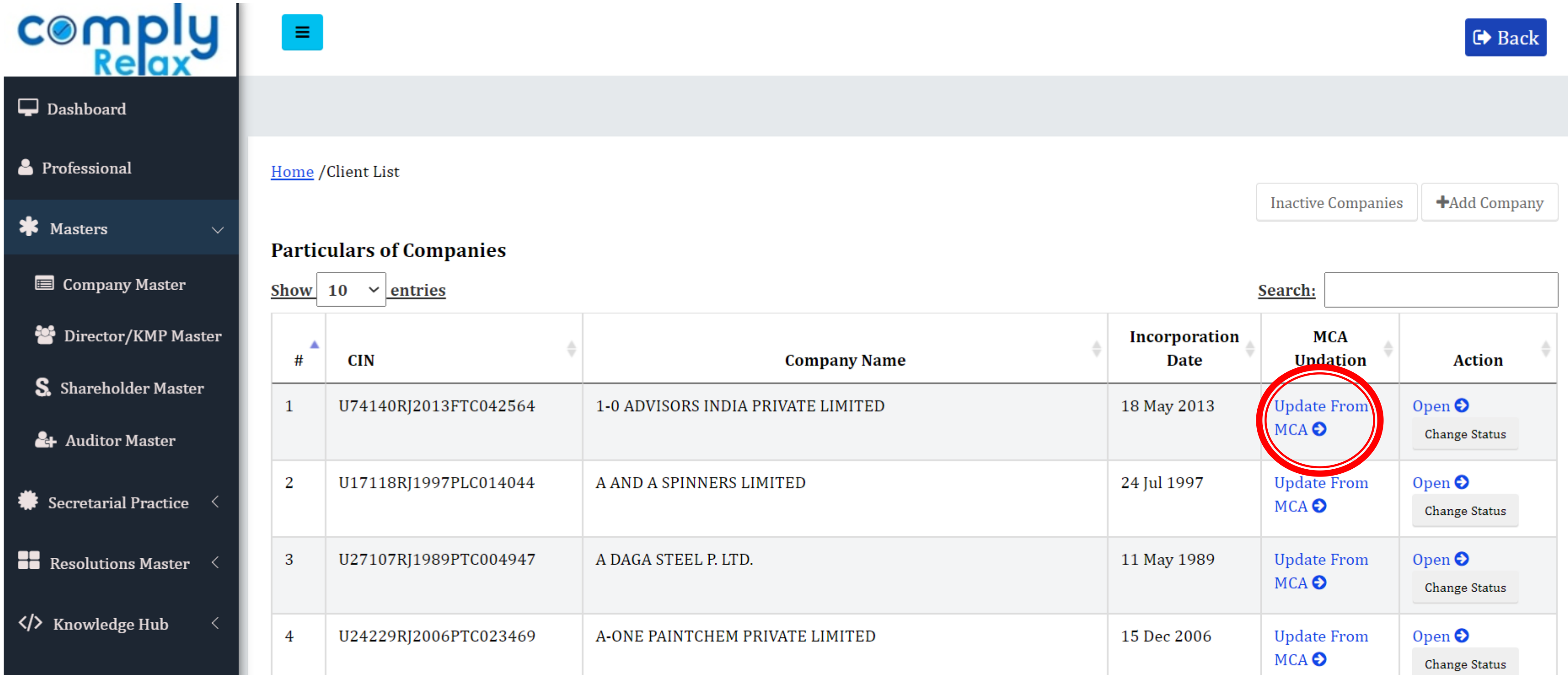
Steps: On the Dashboard Select > **Secretarial Practice > MCA Transaction > Fetch MCA Transactions > Select Username, Date (From-To)** and submit

Get DIN Information



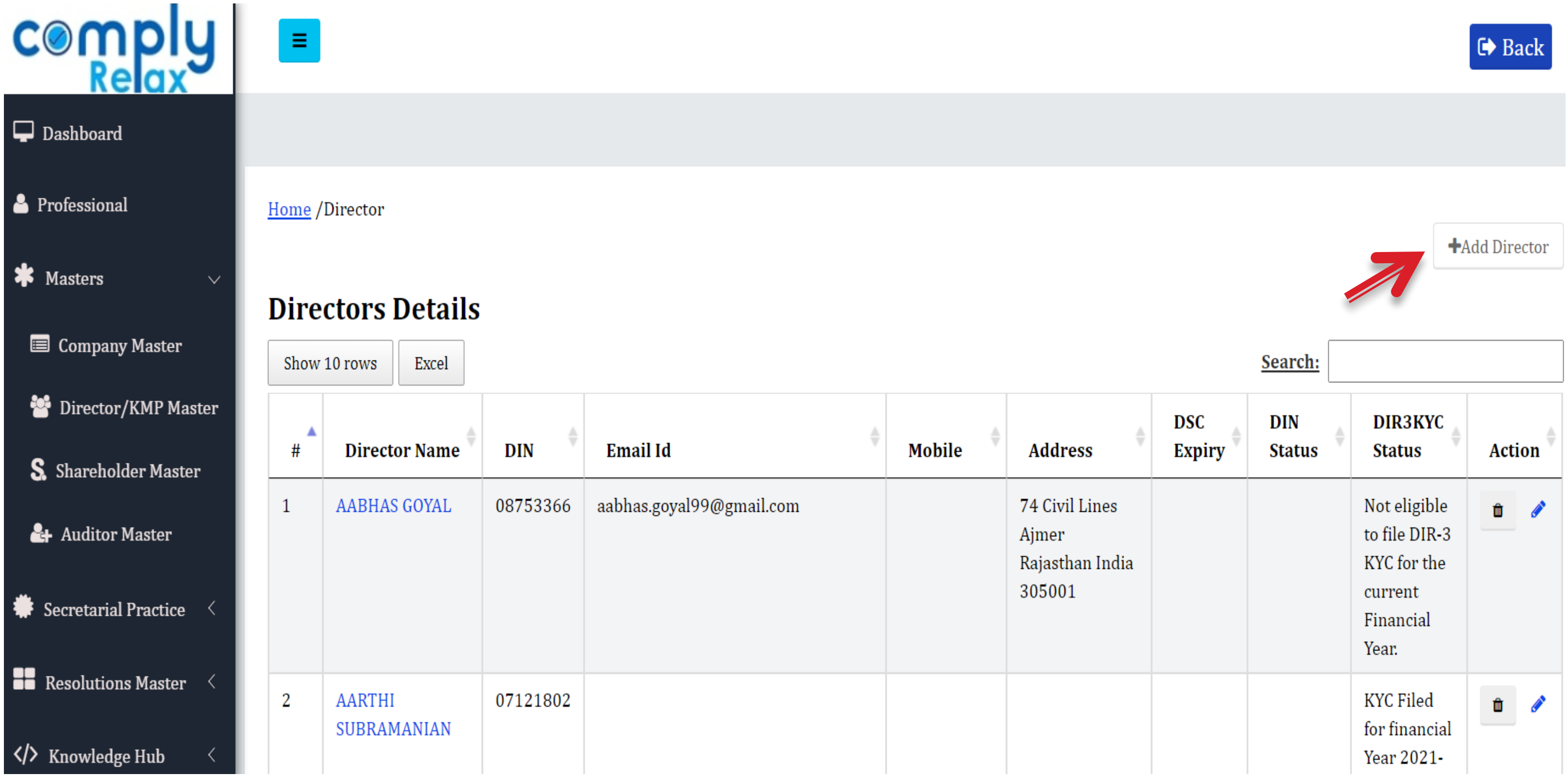
Steps: On the Dashboard Select > **Secretarial Practice > DIN Information > Enter DIN > Prefill from MCA**

Updation of Company's Master



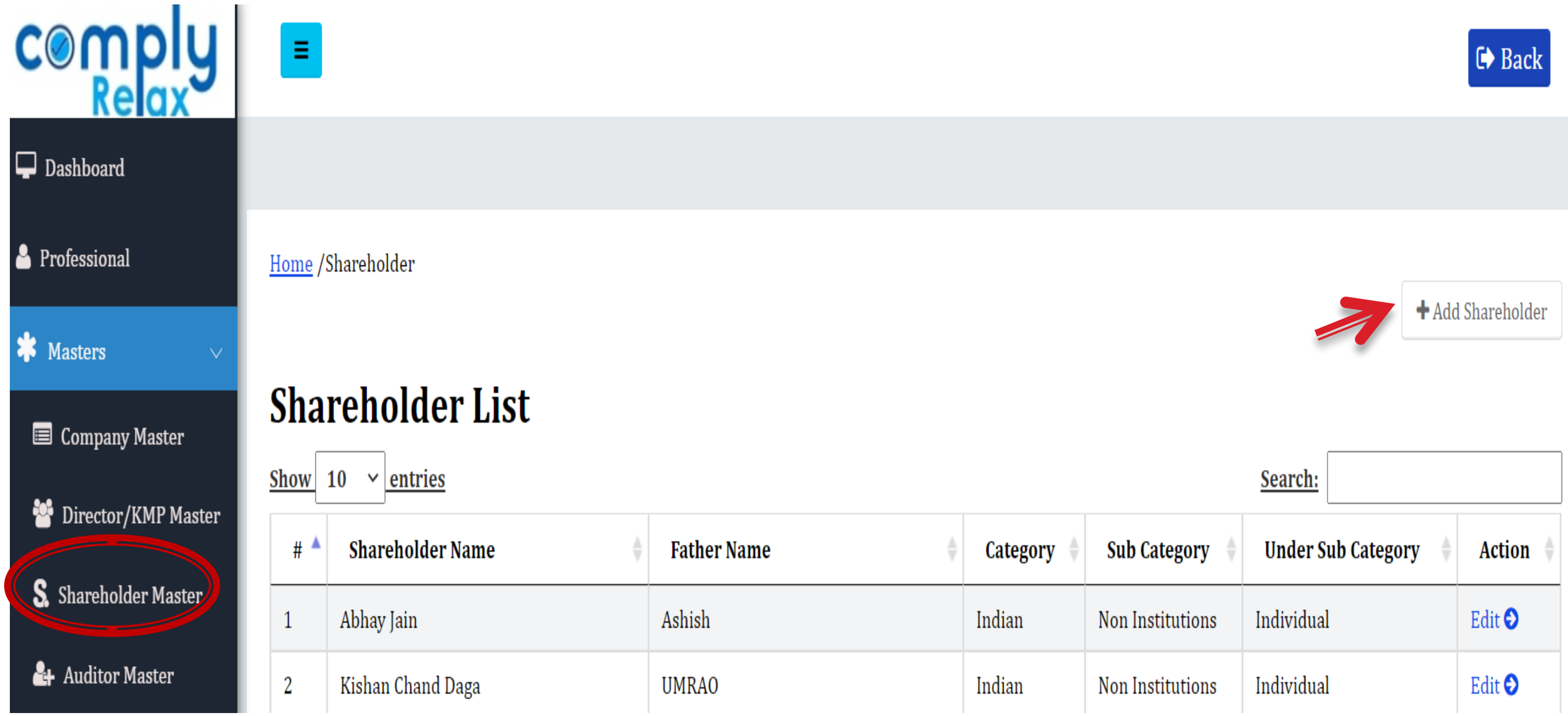
Steps: Click **Masters** > **Company Masters** > Go to the respective Company in the list shown, Click > **Update From MCA,** as shown in the picture to update the Company Master from MCA master data.

Updation of Director/KMP Master



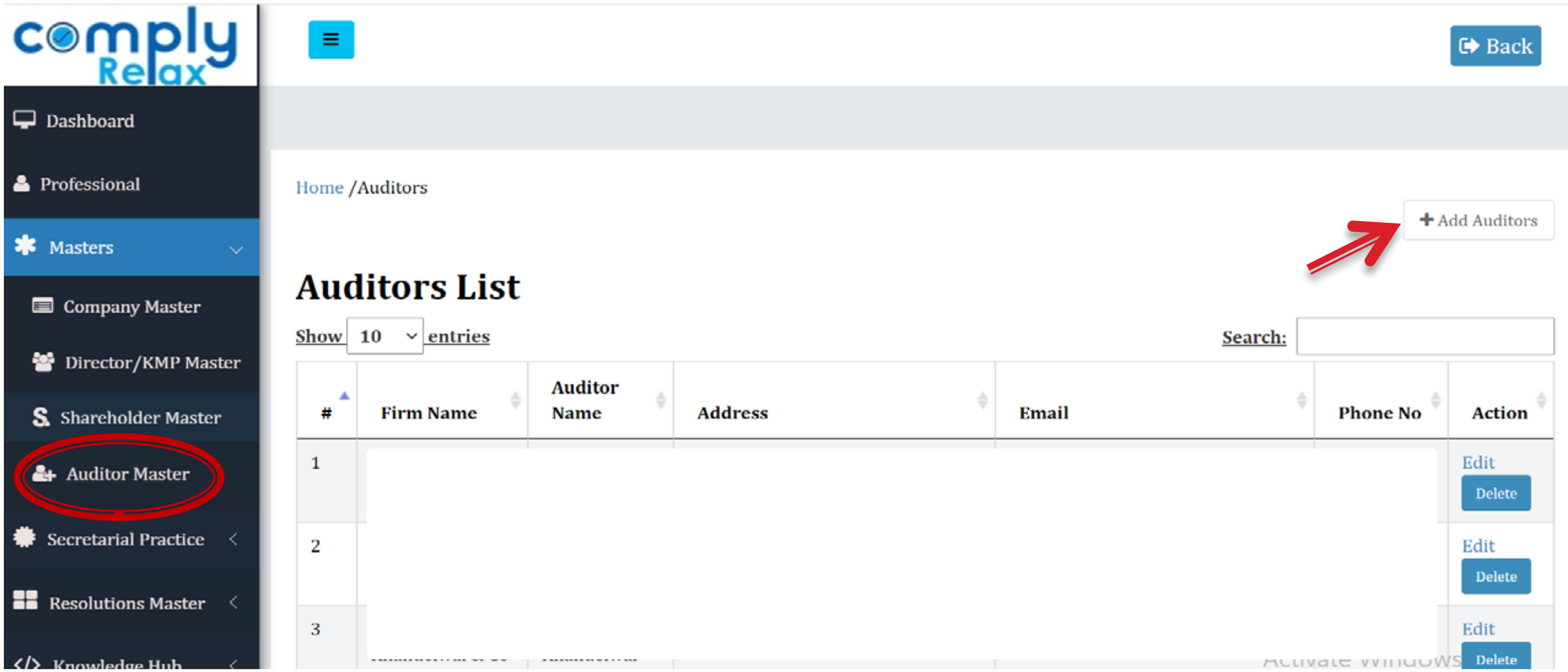
Steps: Click **Masters** > **Director/KMP Master** > Click **Add Director > Pre-Fill** from MCA/**Update**

Updation of Shareholder Master



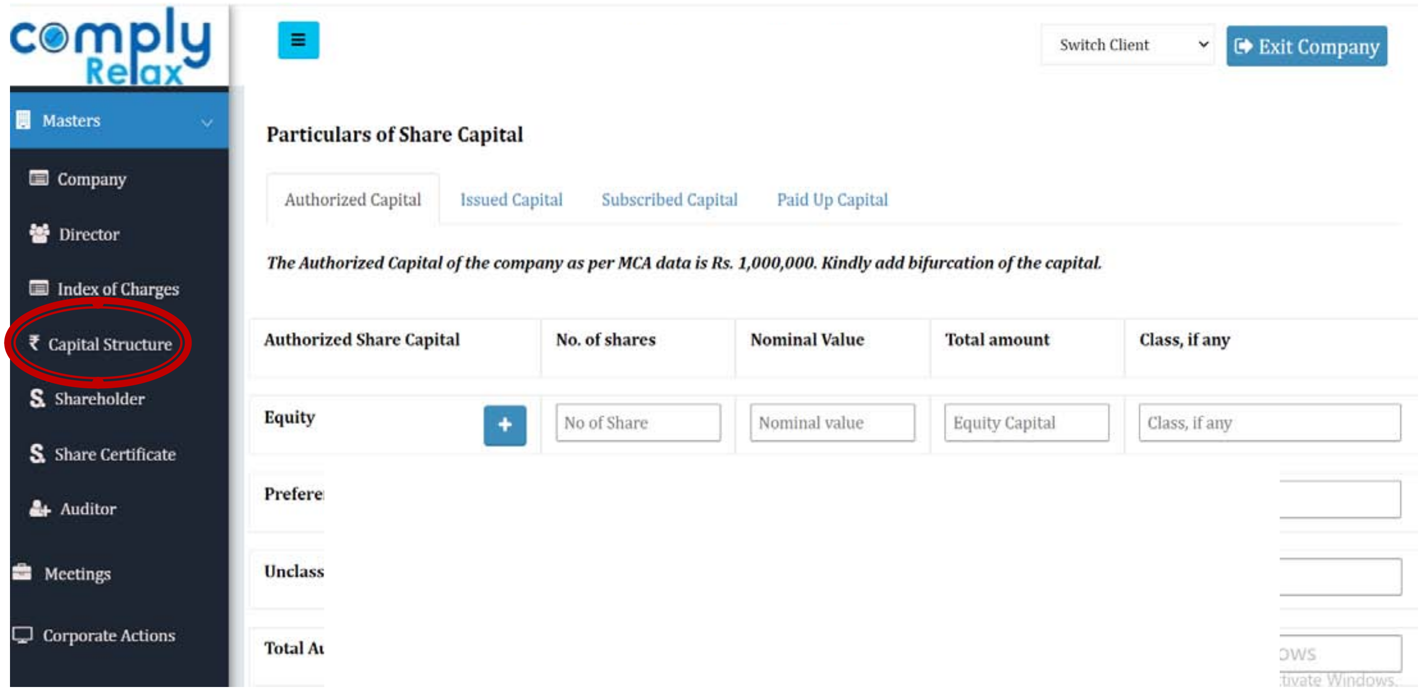
Steps: Click on **Masters > Shareholder Master > Add Shareholder** and fill all the required information.

Updation of Auditor Master



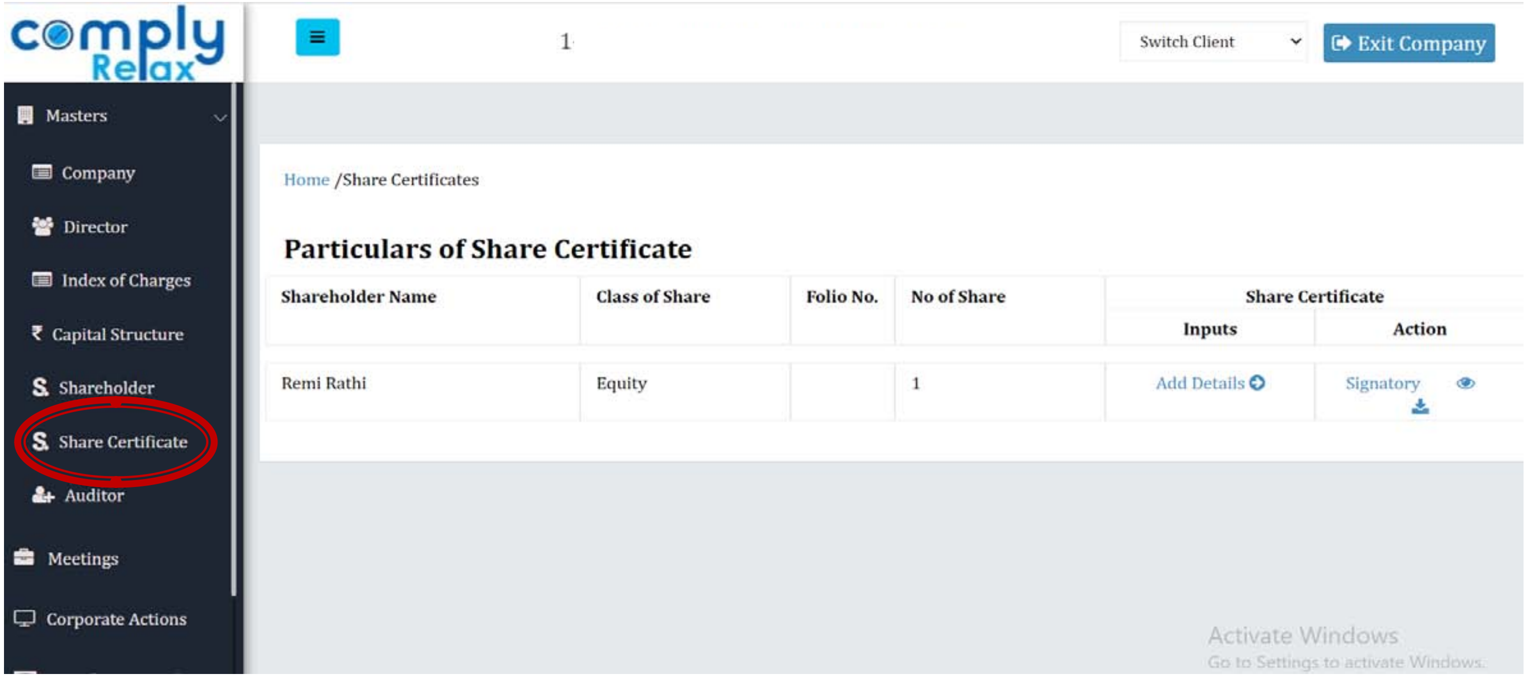
Steps: Click on **Masters > Auditor Master > Add Auditor** and fill in all the required information.

Updating Capital Structure



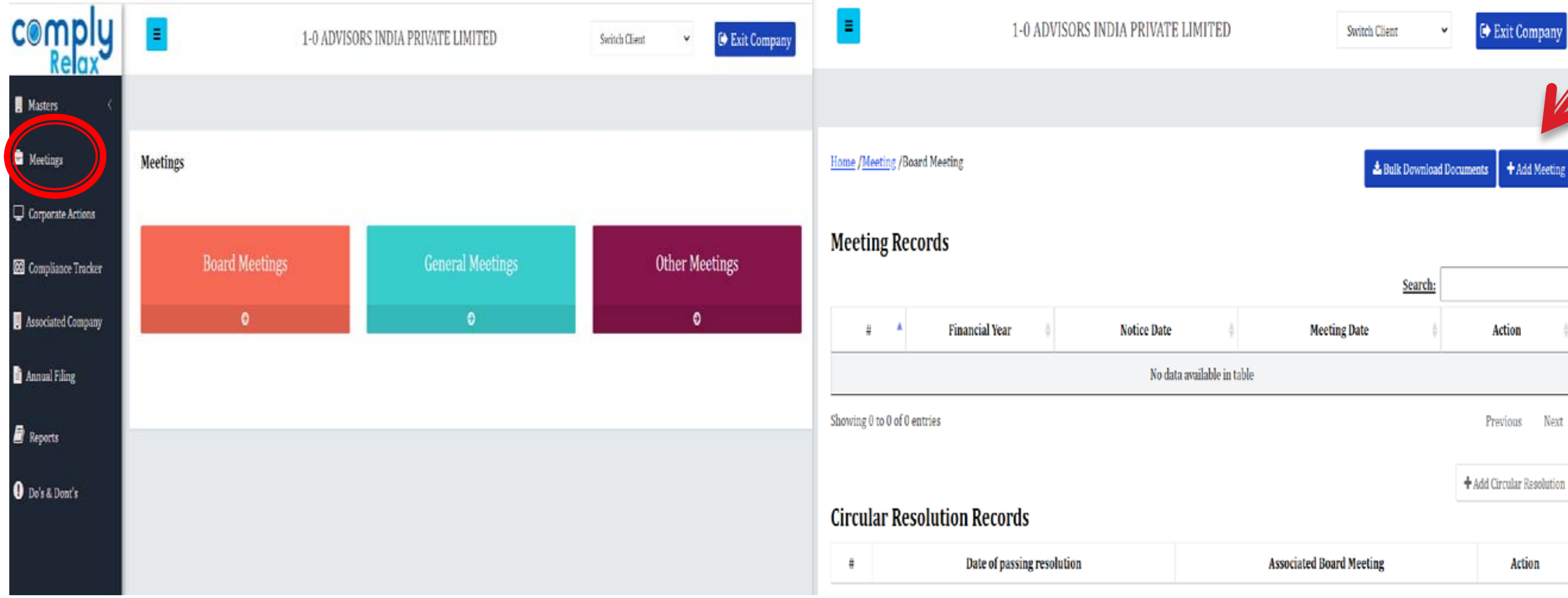
Steps: Click on **Masters > Company Master >** select the company and click **Open > Capital Structure >** fill in all the required information.

Creation of Share Certificates



Steps: Click on **Masters** > **Company Master** > select the company and click **Open** > **Share Certificate** > fill in all the required information and download the Certificates.

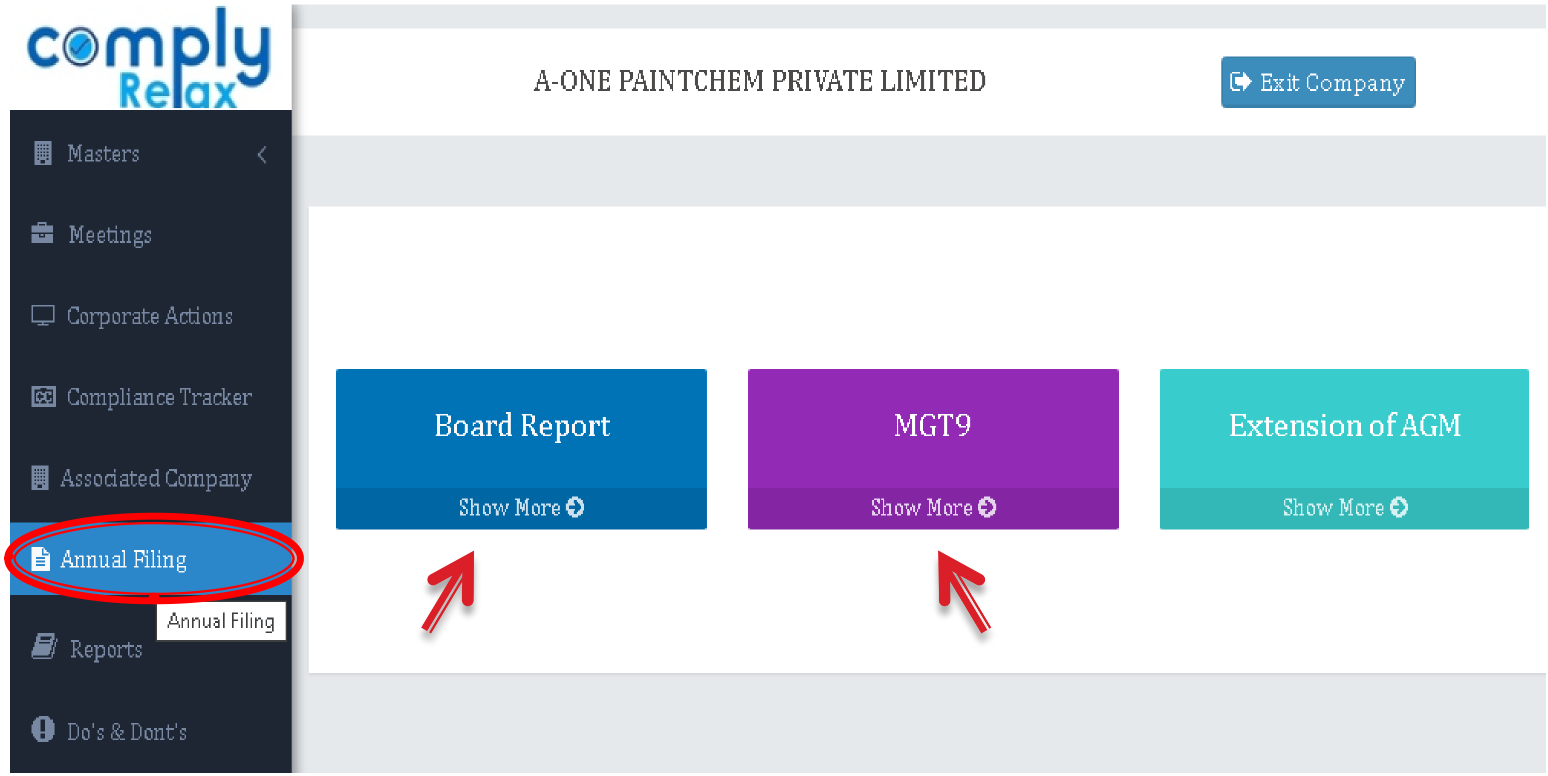
Creation of Meeting Records



Step 1: Click > **Masters** > **Company Masters** > Go to **Company's Name** and click **Open** > **Meetings** tab > select the **type of meeting** (Board Meetings/ General Meetings/ Other Meetings)

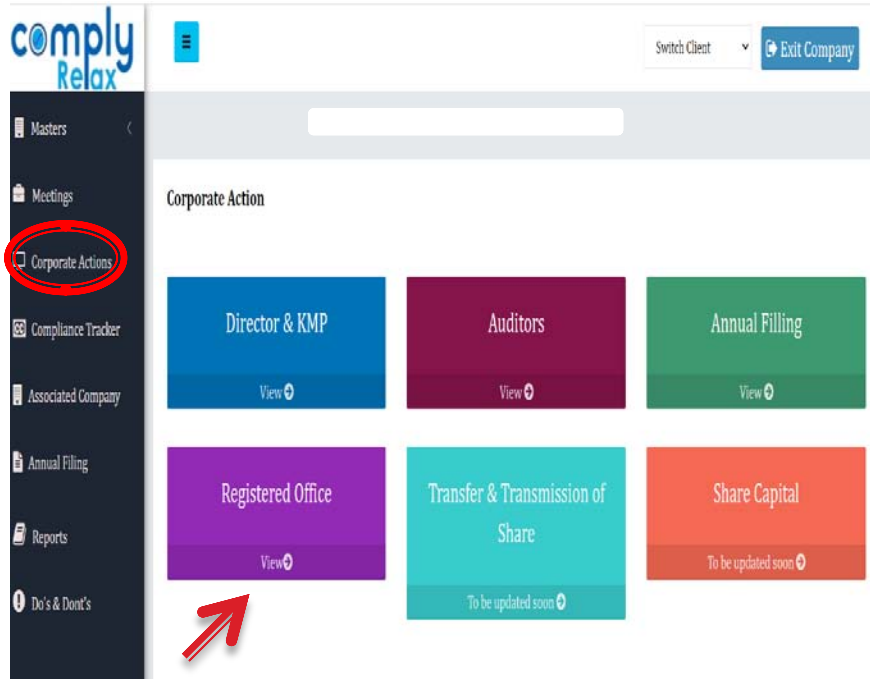
Step 2: Click > **Add Meeting** button and fill all the necessary details.

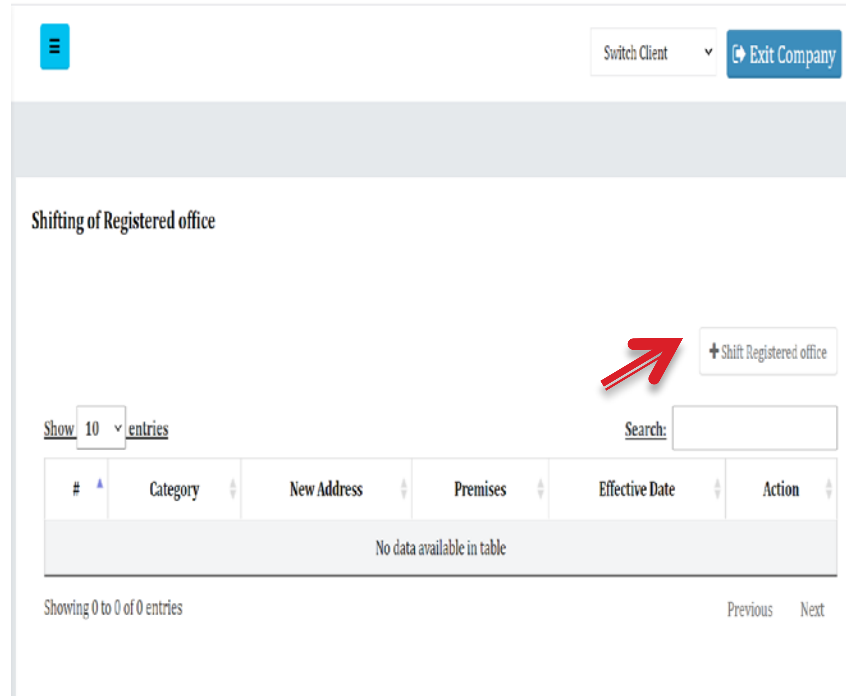
Preparation of Board Report and MGT-9



Steps: Select **Company > Annual Filing > Board Report/ MGT-9.** Fill all the required information to generate document.

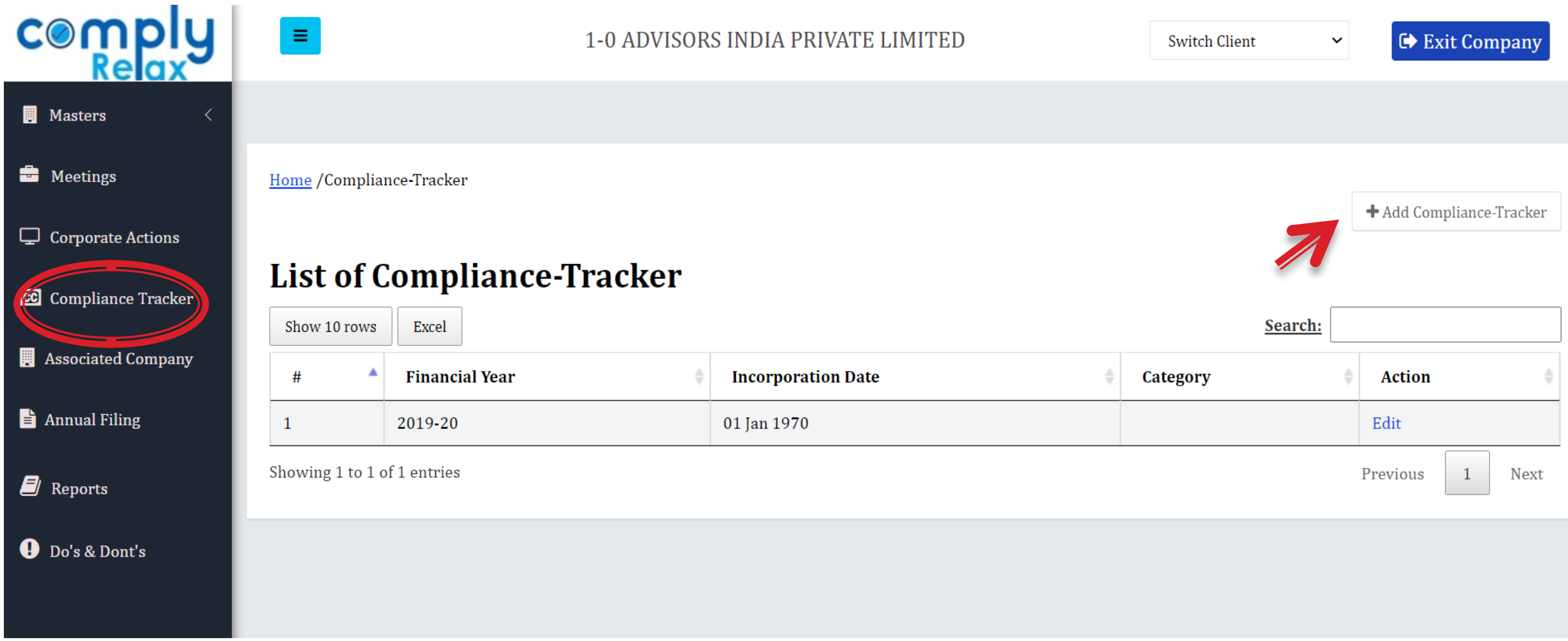
Documents for Shifting registered office





Steps: Select **Company** > **Corporate Actions** > **Registered Office** > **Shift Registered office** > Fill in information and generate documents.

Compliance Tracker



Steps: From list of Companies **Select the Company** > **Compliance Tracker** > **Add Compliance Tracker**.