

# 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

The screenshot displays the Comply Relax HRMS interface. On the left sidebar, the 'HRMS' tab is circled in red, with 'Team members' selected below it. The main content area shows the 'Team members' page with a table of current team members. In the top right corner of this page, the 'Add member' button is highlighted with a red arrow.

Name	Job Title	Email	Phone	
Anupama .	Company Secretary			
Ayushi Jain	Article			X
Bhanwar Kumawat	accountant			X
Deeksha Kaku	Company Secretary			X
Falguni Joshi	Article			X
Harshita Khandelwal	Company Secretary			X

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 Update

The screenshot displays the Comply Relax dashboard interface. On the left is a dark sidebar with navigation options: Dashboard, Thecompaniesact, Lexbuddy, Masters, Secretarial Practice, Knowledge Hub, Clients, Leads, and Assignments. The main dashboard area features several widgets: a login status widget (started at 10:11:54 AM, dated 10-02-2021, with a Log Out button), a tasks widget (1 My open tasks, Add Tasks button), an events widget (0 Events today, Events button), a notes widget (Notes button), a messages widget (Messages button), and a timeline widget (New posts: 0, Timeline button). Below these are summary cards for 292 TOTAL OPEN TASKS and 1424 TOTAL COMPLETED TASKS. An Assignment Timeline shows a task updated by Saket Surolia at 10:59:40 AM, with a status of Pending for. An Events widget shows 'No event found!'. In the top right corner, a user profile dropdown menu is open, with the user's name 'anupama.' and a profile picture circled in red. The menu options include My Profile, Change password, My preferences, Company / Firm Profile, a color selection palette, and Sign Out.

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

The screenshot displays the ComplyRelox HRMS interface. The top navigation bar includes the logo, user profile (Anupama), and notification icons. The main header shows the user's name (Ayushi Jain) and a 'Send message' button. Below this, a summary card displays key metrics: 294 Total Open Tasks, 1424 Total Completed Tasks, 1,372 Total Hours Worked, and 1,123 Total Assignment Hours. The 'Account settings' tab is selected and highlighted with a red arrow. The settings form includes fields for Email, Password, Retype password, and Role (set to Article). Two checkboxes are visible: 'Disable login' and 'Mark as inactive', both of which are circled in red. A 'Save' button is located at the bottom left of the form. A Windows activation watermark is present in the bottom right corner.

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

# Managing Attendance

The screenshot displays the Comply Relax dashboard interface. On the left is a dark sidebar with navigation items: Dashboard, Thecompaniesact, Lexbuddy, Masters, Secretarial Practice, and Knowledge Hub. The main content area features a top navigation bar with a 'Reminders' button, notification icons, and a user profile for 'Anupama'. Below this is a grid of eight widgets: 1. A teal widget showing 'Logged started at : 10:04:39 AM Dated : 06-02-2021' with a clock icon and a 'Log Out' button highlighted by a red arrow. 2. A blue widget for 'My open tasks : 1' with an 'Add Tasks' button. 3. A green widget for 'Events today : 0' with an 'Events' button. 4. An orange widget for 'LEEX BUDDY' with 'Avail Free Trial of 7 Days' and a 'Click Here to Subscribe' link. 5. A purple widget for 'Notes' with a 'Notes' button. 6. A red widget for 'Messages' with a 'Messages' button. 7. A blue widget for 'New posts : 0' with a 'Timeline' button. 8. A yellow-green widget for 'TheCompaniesAct2013' with the tagline 'Enlightening Nation'.

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 ?

The screenshot displays the Comply Relax HRMS interface. On the left, a dark sidebar menu contains various navigation options: Knowledge Hub, Clients, Leads, Assignments, Business Manager, Finance, HRMS, Team members, Time cards, and Leave. The 'Leave' option is circled in red. The main content area is titled 'Leave' and features two buttons: 'Apply leave' and 'Assign leave'. A red arrow points to the 'Apply leave' button. Below the buttons, there are tabs for 'Pending approval', 'All applications', and 'Summary'. A date filter is set to '25' for 'February 2021'. The interface includes options for 'Excel', 'Print', and a search bar. A table with columns for 'Applicant', 'Leave type', 'Date', 'Duration', and 'Status' is shown, but it contains the message 'No record found.' and a pagination indicator '0-0 / 0'.

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

# How to Approve Leave

The screenshot displays the Comply Relax HRMS interface. On the left, a dark sidebar menu contains various navigation options, with 'Leave' under the 'HRMS' section circled in red. The main content area is titled 'Leave' and features two buttons: 'Apply leave' and 'Assign leave'. A red arrow points to the 'Assign leave' button. Below the buttons, there are tabs for 'Pending approval', 'All applications', and 'Summary'. A table header is visible with columns for 'Applicant', 'Leave type', 'Date', 'Duration', 'Status', and a menu icon. The table body contains the text 'No record found.' and a pagination control showing '0-0 / 0'.

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

# Add or Remove Client

The screenshot shows the 'comply Relax' dashboard. The left sidebar contains navigation items: Dashboard, Thecompaniesact, Lexbuddy, Masters, Secretarial Practice, Knowledge Hub, Clients (circled in red), Leads (circled in red), and Assignments. The main content area is titled 'Clients' and 'Primary Contacts'. It features buttons for 'Add Company' and 'Add client' (highlighted with a red arrow). Below these are filters for '25' items, a search bar, and options for 'Excel' and 'Print'. A table displays client data:

Company name	Assigned Members	Client groups	Invoice Value	Payment Received	Due	
1-0 ADVISORS INDIA PRIVATE LIMITED			Rs 5,900	Rs 4,360	Rs 1,540	
A AND A SPINNERS LIMITED			Rs 0	Rs 0	Rs 0	
A DAGA STEEL P. LTD.			Rs 0	Rs 0	Rs 0	
A-ONE PAINTCHEM PRIVATE LIMITED			Rs 0	Rs 0	Rs 0	

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

comply Relax

complyrelax.com says  
Are you sure to Inactive this Company ?

Back

OK Cancel

Home /Client List

Inactive Companies +Add Company

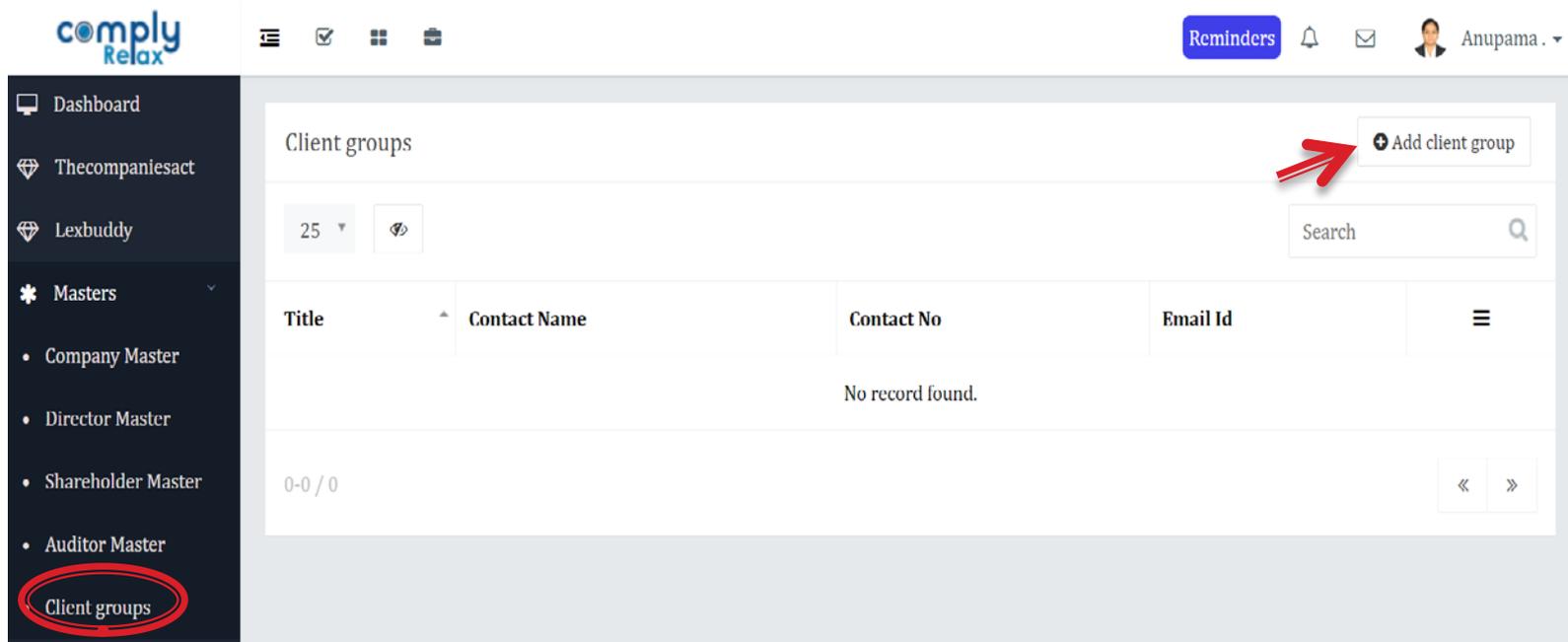
Particulars of Companies

Show 10 entries Search:

#	CIN	Company Name	Incorporation Date	MCA Updation	Action
1	U74140RJ2013FTC042564	1-0 ADVISORS INDIA PRIVATE LIMITED	18 May 2013	Update From MCA	Open Change Status

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



The screenshot displays the Comply Relax web application interface. On the left, a dark sidebar menu contains the following items: Dashboard, Thecompaniesact, Lexbuddy, Masters (expanded), Company Master, Director Master, Shareholder Master, Auditor Master, and Client groups (highlighted with a red circle). The main content area is titled 'Client groups' and features a '+ Add client group' button in the top right corner, indicated by a red arrow. Below the button is a search bar with the text 'Search' and a magnifying glass icon. A table with the following columns is visible: Title, Contact Name, Contact No, Email Id, and a menu icon. The table contains the text 'No record found.' and a pagination indicator '0-0 / 0' at the bottom left. The top right of the page shows a 'Reminders' button, a notification bell, an email icon, and a user profile for 'Anupama'.

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

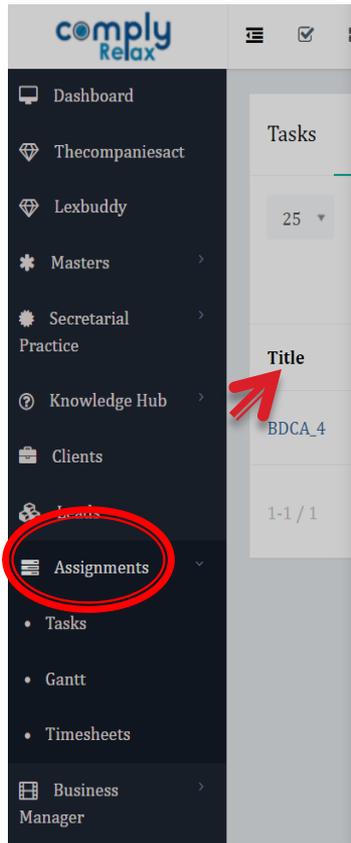
# Adding Tasks

Figure A shows the 'Clients' section of the ComplyRelax software. The 'Assignments' tab is selected, and a red arrow points to it. The interface displays client information, including 'Client Name - 1', and a 'Switch Client' dropdown. Below this, there are four cards representing different metrics: 'Tasks' (2), 'Invoice Value' (Rs 5,900), 'Payments' (Rs 4,360), and 'Due' (Rs 1,540). The 'Assignments' tab is highlighted in the navigation bar.

Figure B shows the 'Tasks List' view of the ComplyRelax software. The 'Add task' button is circled in red. The interface displays a table with columns for 'Title', 'Company name', 'Assignment', 'Assigned to', 'Approver', and 'Status'. The table is currently empty, showing 'No record found.' The 'Add task' button is located in the top right corner of the task list area.

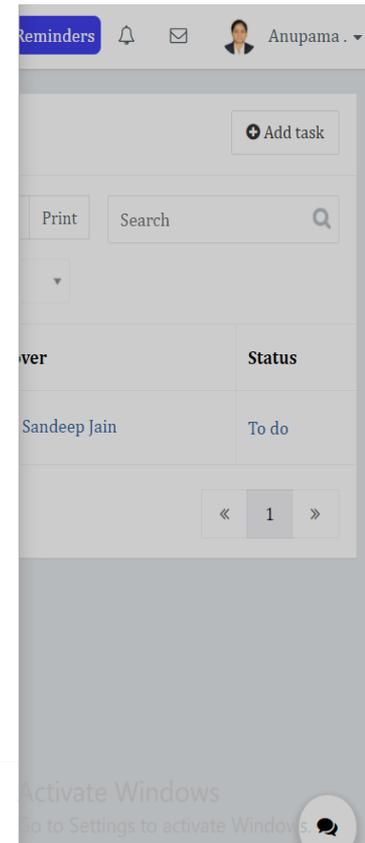
Steps : Click > **Clients** > select **Name of Company** > Go to **Assignments** as shown in Fig. A. > choose the assignment **Title** > **Task List** > **Add Task** as shown in Fig. B.

# Editing Task



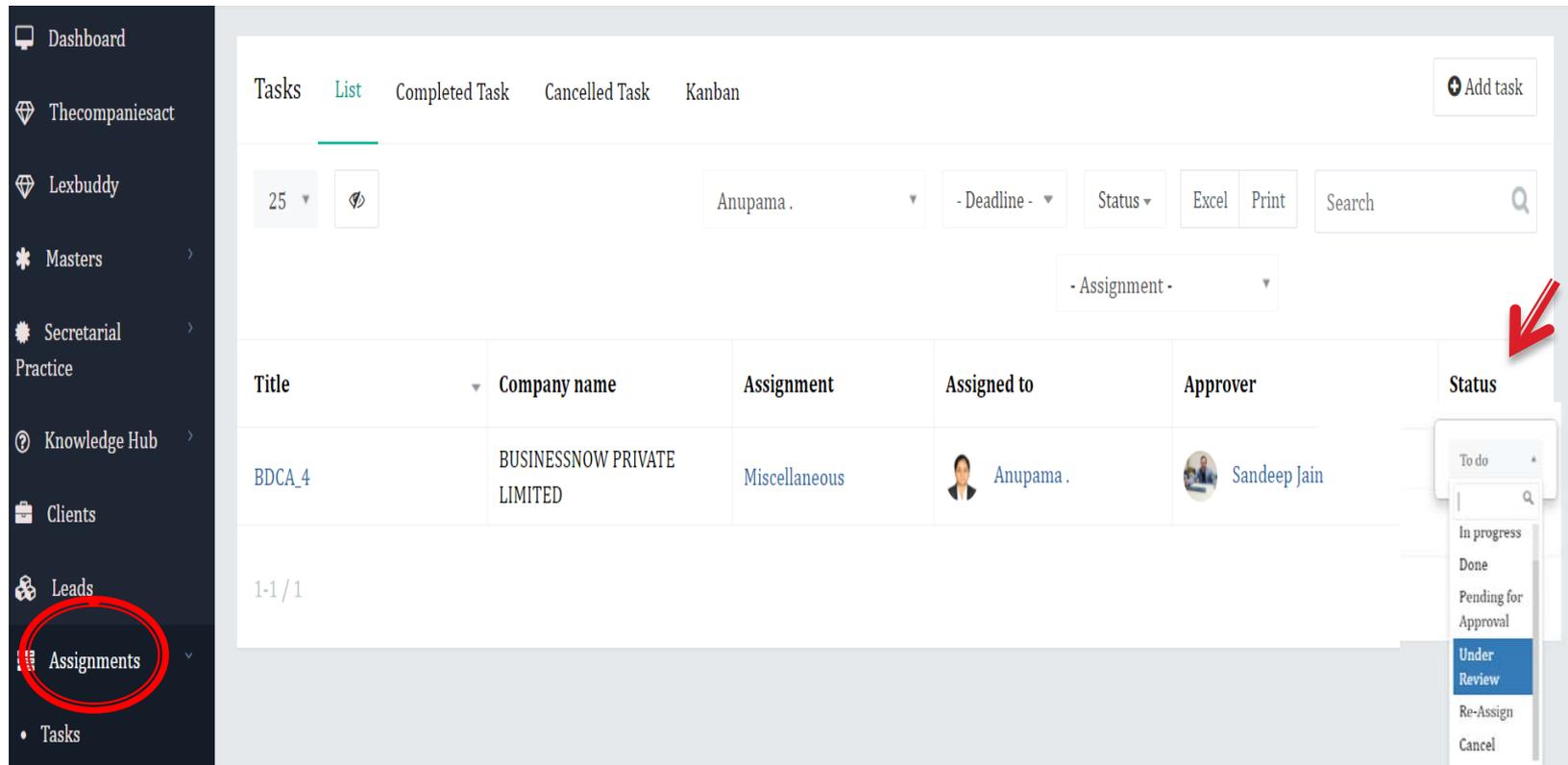
Updated Task: #1368 - BDCA\_4

- Description:
  1. Outline a business plan, Enlisting product features and benefits offered to professionals post association.
  2. Include in business plan about newsletter and BDCA ~~report~~ report
  3. Include about Complyrelax in business plan



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

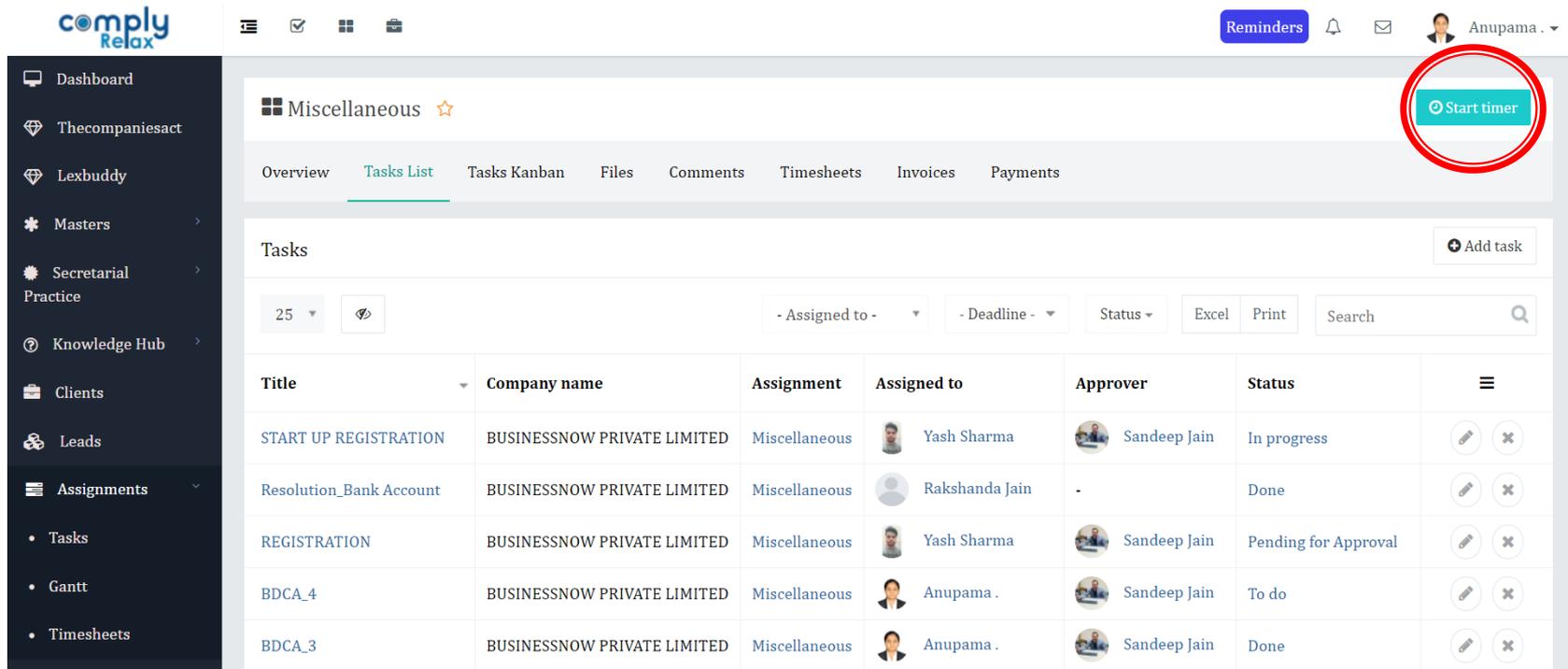


The screenshot displays a task management interface. On the left is a dark sidebar with navigation items: Dashboard, Thecompaniesact, Lexbuddy, Masters, Secretarial Practice, Knowledge Hub, Clients, Leads, Assignments (circled in red), and Tasks. The main area shows a 'Tasks' view with tabs for 'List', 'Completed Task', 'Cancelled Task', and 'Kanban'. An 'Add task' button is in the top right. Below are filters for '25' items, a refresh icon, and dropdowns for 'Anupama .', '- Deadline -', 'Status', 'Excel', 'Print', and a search bar. A table lists tasks with columns: Title, Company name, Assignment, Assigned to, Approver, and Status. A dropdown menu is open over the 'Status' column of the first row, showing options: To do, In progress, Done, Pending for Approval, Under Review (highlighted), Re-Assign, and Cancel. A red arrow points to the 'Status' column header.

Title	Company name	Assignment	Assigned to	Approver	Status
BDCA_4	BUSINESSNOW PRIVATE LIMITED	Miscellaneous	Anupama .	Sandeep Jain	Under Review

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?

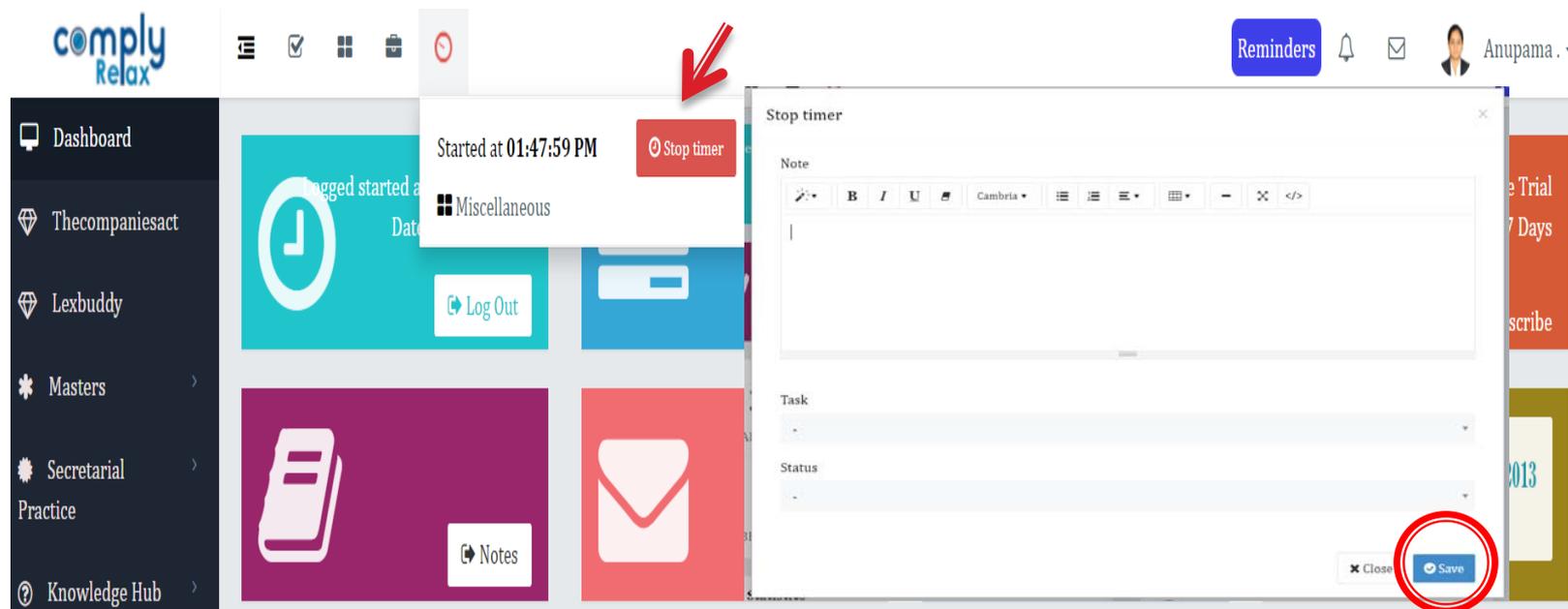


The screenshot displays the Comply Relax dashboard. On the left is a dark sidebar with navigation options: Dashboard, Thecompaniesact, Lexbuddy, Masters, Secretarial Practice, Knowledge Hub, Clients, Leads, and Assignments (with sub-items: Tasks, Gantt, Timesheets). The main content area is titled 'Miscellaneous' and has tabs for Overview, Tasks List (selected), Tasks Kanban, Files, Comments, Timesheets, Invoices, and Payments. At the top right, there are buttons for Reminders, a notification bell, an email icon, and a user profile for Anupama. A red circle highlights a teal 'Start timer' button in the top right corner of the main content area. Below this, there is a 'Tasks' section with an 'Add task' button and a filter bar containing a dropdown for '25', a refresh icon, and filters for 'Assigned to', 'Deadline', 'Status', 'Excel', 'Print', and a search field. A table lists tasks with columns for Title, Company name, Assignment, Assigned to, Approver, and Status.

Title	Company name	Assignment	Assigned to	Approver	Status	
START UP REGISTRATION	BUSINESSNOW PRIVATE LIMITED	Miscellaneous	Yash Sharma	Sandeep Jain	In progress	 
Resolution_Bank Account	BUSINESSNOW PRIVATE LIMITED	Miscellaneous	Rakshanda Jain	-	Done	 
REGISTRATION	BUSINESSNOW PRIVATE LIMITED	Miscellaneous	Yash Sharma	Sandeep Jain	Pending for Approval	 
BDCA_4	BUSINESSNOW PRIVATE LIMITED	Miscellaneous	Anupama .	Sandeep Jain	To do	 
BDCA_3	BUSINESSNOW PRIVATE LIMITED	Miscellaneous	Anupama .	Sandeep Jain	Done	 

Steps: Click **Assignments** > Choose **Assignment Title** > Click 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

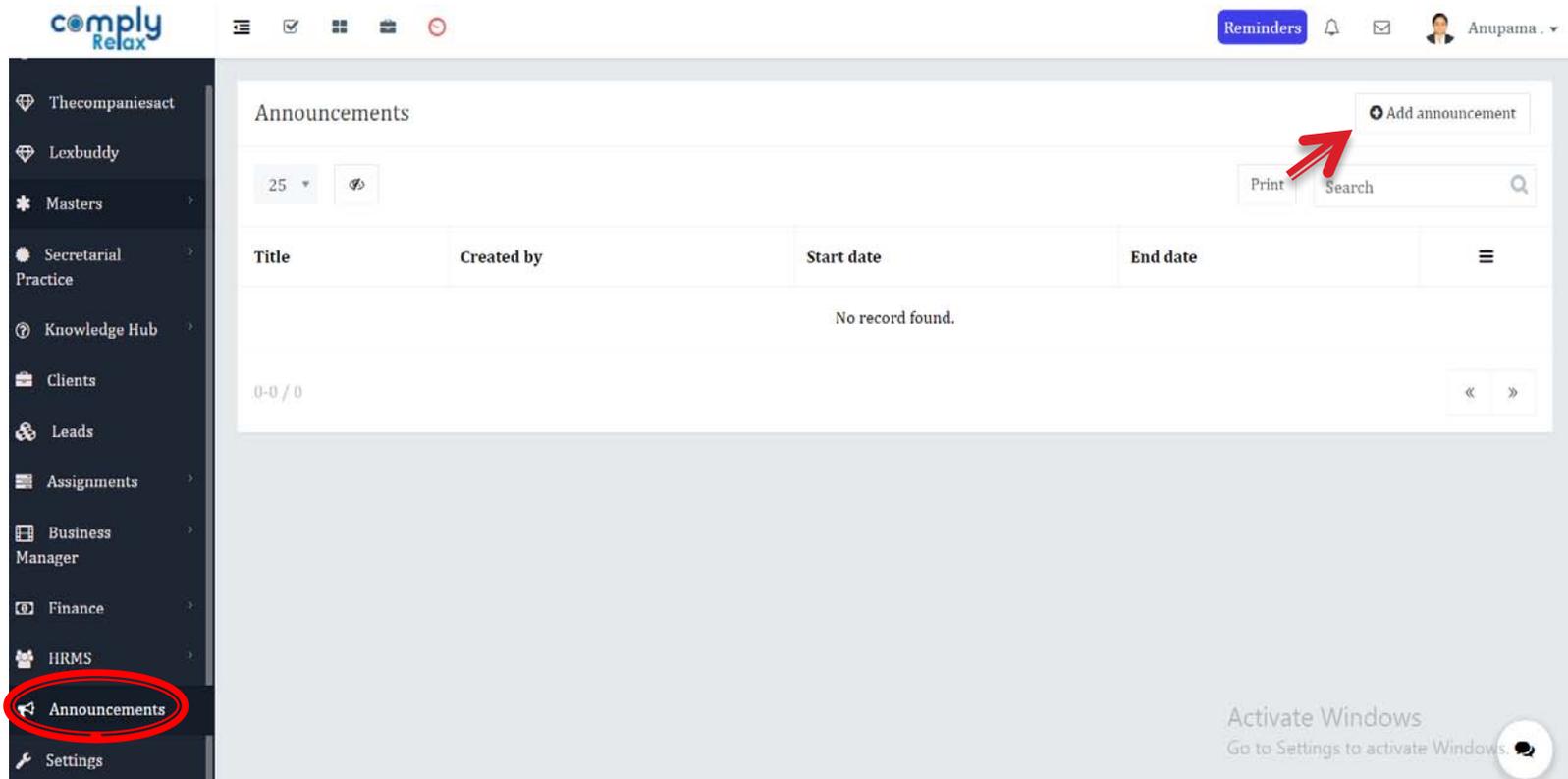
Step 3: Click on > dropdown arrow, **select** > the **task** you wish to stop timer for and add comments (if any) then click > **save** button.

# Adding New Post

The screenshot displays the Comply Relax dashboard interface. On the left is a dark sidebar menu with options: Dashboard, Thecompaniesact, Lexbuddy, Masters, Secretarial Practice, Knowledge Hub, Clients, Leads, and Assignments. The main dashboard area features a top navigation bar with a 'Reminders' button, notification icons, and a user profile for 'Anupama'. Below this is a grid of widgets: 'Log In started at : 10:05:48 AM Dated : 09-02-2021' with a 'Log Out' button; 'My open tasks : 1' with an 'Add Tasks' button; 'Events today : 0' with an 'Events' button; 'Notes' with a 'Notes' button; 'Messages' with a 'Messages' button; and 'New posts : 0' with a 'Timeline' button. A red arrow points to the 'Timeline' button in the 'New posts' widget. To the right of the grid are promotional banners for 'LEX BUDDY' and 'TheCompaniesAct2013'. At the bottom, there are summary cards for 'TOTAL OPEN TASKS' (265) and 'TOTAL COMPLETED TASKS' (1410), an 'Assignment Timeline' showing a task update by Saumya Shandilya, and an 'Events' section with 'No event found!'.

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

# How to make Announcements?



The screenshot displays the Comply Relax software interface. On the left, a dark sidebar contains a list of menu items: Thecompaniesact, Lexbuddy, Masters, Secretarial Practice, Knowledge Hub, Clients, Leads, Assignments, Business Manager, Finance, HRMS, **Announcements** (circled in red), and Settings. The main content area is titled 'Announcements' and features a top navigation bar with a 'Reminders' button, notification icons, and a user profile for 'Anupama'. Below the title, there is a '+ Add announcement' button, a 'Print' button, and a search bar. A table with columns 'Title', 'Created by', 'Start date', and 'End date' is shown, containing the message 'No record found.' and a pagination indicator '0-0 / 0'. A red arrow points to the '+ Add announcement' button.

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

# Adding Event

The screenshot displays the Comply Relax dashboard interface. On the left is a dark sidebar with navigation options: Dashboard, Thecompaniesact, Lexbuddy, Masters, Secretarial Practice, Knowledge Hub, and Clients. The main dashboard area features a grid of widgets. A red arrow points to the 'Events' widget, which shows 'Events today: 0'. Below this grid are summary cards for '251' clients and '1407' assignments. On the right side, the 'Event calendar' is visible, showing a calendar for February 2021. A red arrow points to the 'Add event' button in the top right corner of the calendar section.

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

# How to Add Notes ?

The screenshot displays the Comply Relax dashboard. On the left is a dark sidebar with navigation options: Dashboard, Thecompaniesact, Lexbuddy, Masters, Secretarial Practice, Knowledge Hub, and Clients. The main dashboard area features a grid of colorful widgets: a teal 'Log Out' widget, a blue 'My open tasks : 1' widget, a green 'Events today : 0' widget, an orange 'LEX BUDDY' widget, a purple 'Notes' widget (highlighted with a red arrow), a red 'Messages' widget, a blue 'New posts : 0' widget, and a yellow 'TheCompaniesAct2013' widget. Below the grid are summary cards for '252', '1107', 'Assignment Timeline', and 'Events'. On the right, a 'Notes (Private)' window is open, showing a search bar and an 'Add note' button (highlighted with a red arrow). Below the search bar is a table with columns 'Created date', 'Title', and 'Files', and a 'No record found' message.

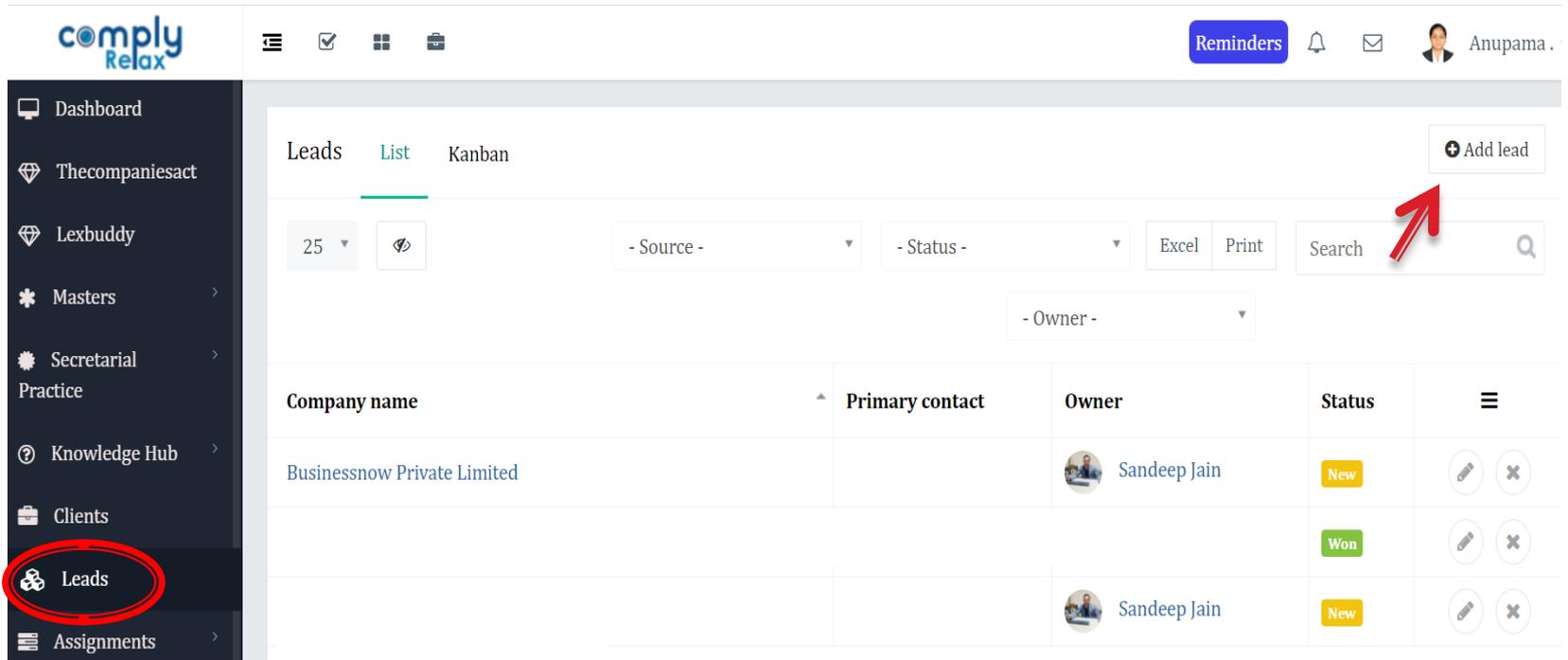
Steps: Click on > **Notes** > **Add Notes** button on right corner of the window and fill the required details > Click **Save**.

# Messaging

The screenshot displays the Comply Relax dashboard interface. On the left is a dark sidebar with navigation options: Dashboard, Thecompaniesact, Lexbuddy, Masters, Secretarial Practice, Knowledge Hub, Clients, Leads, Assignments, and Business Manager. The main dashboard area features a grid of widgets. A red arrow points to the 'Messages' widget, which is highlighted in red and shows an envelope icon. Other widgets include: 'Log Out' (clock icon, 'Logged started at : 10:05:48 AM Dated : 09-02-2021'), 'Add Tasks' (list icon, 'My open tasks : 1'), 'Events' (calendar icon, 'Events today : 0'), 'Notes' (notepad icon), 'Timeline' (speech bubbles icon, 'New posts : 0'), and a 'LEX BUDDY' trial offer. Below the grid are summary cards for 'TOTAL OPEN TASKS' (265), 'TOTAL COMPLETED TASKS' (1410), 'MEMBERS LOGGED IN' (11), and 'MEMBERS LOGGED OUT' (2). An 'Assignment Timeline' card shows an update for 'Task: #2368 - Object Alteration' by Saumya Shandilya. An 'Events' card shows 'No event found!' with a calendar icon.

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

# Adding Business Leads



The screenshot displays the Comply Relax dashboard interface. On the left, a dark sidebar contains navigation items: Dashboard, Thecompaniesact, Lexbuddy, Masters, Secretarial Practice, Knowledge Hub, Clients, Leads (circled in red), and Assignments. The main content area is titled 'Leads' and shows a 'List' view. At the top right of this area is an 'Add lead' button with a plus icon, highlighted by a red arrow. Below the button are filters for 'Source', 'Status', and 'Owner', along with 'Excel' and 'Print' buttons and a search bar. A table below shows a list of leads with columns for Company name, Primary contact, Owner, and Status. The first row shows 'Businessnow Private Limited' with 'Sandeep Jain' as the owner and 'New' status. The second row shows a lead with 'Won' status. The third row shows another lead with 'Sandeep Jain' as the owner and 'New' status.

Company name	Primary contact	Owner	Status	
Businessnow Private Limited		Sandeep Jain	New	
			Won	
		Sandeep Jain	New	

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

# Adding Registrations, Contracts, Insurance

The screenshot shows the ComplyRelax dashboard interface. On the left is a dark navigation sidebar with the following items: Clients, Leads, Assignments, Business Manager (highlighted with a red box), Finance, and HRMS. The Business Manager sub-menu is expanded, showing: Registration/Licence, Insurance, Contract/Agreement, and Expiry Manager. The main content area has a breadcrumb trail: Business Manager > Registration/Licence > Insurance > Contract/Agreement. A red arrow points to the '+ Add Registration' button in the top right of the main area. Below the breadcrumb is a search bar and a table with columns: Company Name, Category, Reg. Name, Reg. Number, Status, Valid From, Expires On, and Files. The table currently displays 'No record found.' and pagination shows '0-0 / 0'.

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

# Add Invoices, Payments

The screenshot displays the Comply Relax software interface. On the left is a dark navigation menu with the following items: Clients, Leads, Assignments, Business Manager, Finance (highlighted with a red box), Invoices, Payments, Expenses, and Income vs Expenses. The main content area is titled 'Invoices' and includes tabs for 'Monthly', 'Yearly', 'Custom', and 'Recurring'. At the top right of the main area are buttons for 'Add payment' and 'Add invoice', both indicated by red arrows. Below these buttons is a filter section with a dropdown set to '25', a refresh icon, a status dropdown, and navigation arrows for 'February 2021'. There are also 'Excel' and 'Print' buttons, and a search bar. The main table has columns for Invoice ID, Client, Assignment, Bill date, Due date, Invoice Value, Payment Received, Status, and a menu icon. Two rows are visible, both with a 'Draft' status and a gear icon for settings.

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

comply Relax

Dashboard

Professional

Masters

Secretarial Practice

**Annual Filing Status**

DSC Management

DIR-3-KYC Status

MCA User

MCA Transaction

Home / Annual Filing Management

Not Applicable for Annual Filing

Annual Filing Status

Show 10 entries

Search:

#	Company Name	Annual Filing Applicability	Financial Year	AGM Date	Receipt Date	Status	Update Compliance Tracker
1	1-0 ADVISORS INDIA PRIVATE LIMITED	Applicable	2019-20				
2	A AND A SPINNERS LIMITED	Select Applicabilit					

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

# DSC Management

comply Relax

Dashboard  
Professional  
Masters  
Secretarial Practice  
Annual Filing Status  
**DSC Management**  
DIR-3-KYC Status  
MCA User  
MCA Transaction  
DIN Information

Back

+Add DSC +Add Box

794 Total  
310 Active  
2 Expiring in 15 Days  
485 Expired

More info More info More info More info

### DSC Records

Show 10 entries Search:

#	Director Name	DIN	DSC Expiry	Availability	Location	In/Out	Action
1	AABHAS GOYAL	08753366				Dsc In	Edit
2	AARTHI SUBRAMANIAN	07121802				Dsc In	Edit
3	AARTI JAIN	08296286	31 Oct 2022	Yes	B-3 : 15	Dsc Out	Edit

Activate Windows

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

# Updation of DIR-3 KYC Status

comply Relax

Dashboard

Professional

Masters

Secretarial Practice

Annual Filing Status

DSC Management

**DIR-3-KYC Status**

MCA User

MCA Transaction

Home /DIR-3-KYC Status

Enter DIN

**DIN Pending for KYC Updation**

Show 10 entries Search:

Sl.No	Director Name	DIN	Status	Action
1	AABHAS GOYAL	08753366	Not eligible to file DIR-3 KYC for the current Financial Year.	<input type="button" value="Update"/>
2	ABDUL LATEEF HUMNABAD	00890291	Not Filed	<input type="button" value="Update"/>
3	ABHAI KUMAR BHARGAVA	07696267	Not Filed	<input type="button" value="Update"/>

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

# Add MCA User Account

The screenshot displays the Comply Relax web application interface. On the left is a dark sidebar with a menu. The 'MCA User' option is circled in red. The main content area shows the breadcrumb 'Home / MCA User' and a '+Add MCA User' button with a red arrow pointing to it. Below this is the heading 'Particulars of your MCA Account'. There is a 'Show 10 entries' dropdown and a search box. A table lists three existing users with columns for '#', 'User Name', 'Password', and 'Action'. The 'Action' column contains delete and edit icons. At the bottom, it says 'Showing 1 to 3 of 3 entries' and has pagination controls for 'Previous', '1', and 'Next'.

comply Relax

Dashboard

Professional

Masters

Secretarial Practice

Annual Filing Status

DSC Management

DIR-3-KYC Status

**MCA User**

MCA Transaction

DIN Information

Home / MCA User

+Add MCA User

Particulars of your MCA Account

Show 10 entries Search:

#	User Name	Password	Action
1		*****	
2		*****	
3		*****	

Showing 1 to 3 of 3 entries

Previous 1 Next

Activate Windows

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

# Fetch MCA Transactions

comply Relax

Dashboard

Professional

Masters

Secretarial Practice

Annual Filing Status

DSC Management

DIR-3-KYC Status

MCA User

**MCA Transaction**

DIN Information

Home / MCA Transactions

+ Fetch MCA Transactions

+ Get SRN Details

### Particulars of MCA Transactions

All Transactions Approved Pending Pending For Payment

Show 10 entries

Search:

#	Company Name	SRN	Amount	Payment Status	Transaction Status	Transaction Date	MCA User	Action
1		H99240277 (AOC-4 XBRL)	600.00	Paid	Approved	01-10-2019		
2		R00050864 (AOC-4 XBRL)	600.00	Paid	Approved	04-10-2019		

Active Windows /S  
Go to S...  
ate Windows.

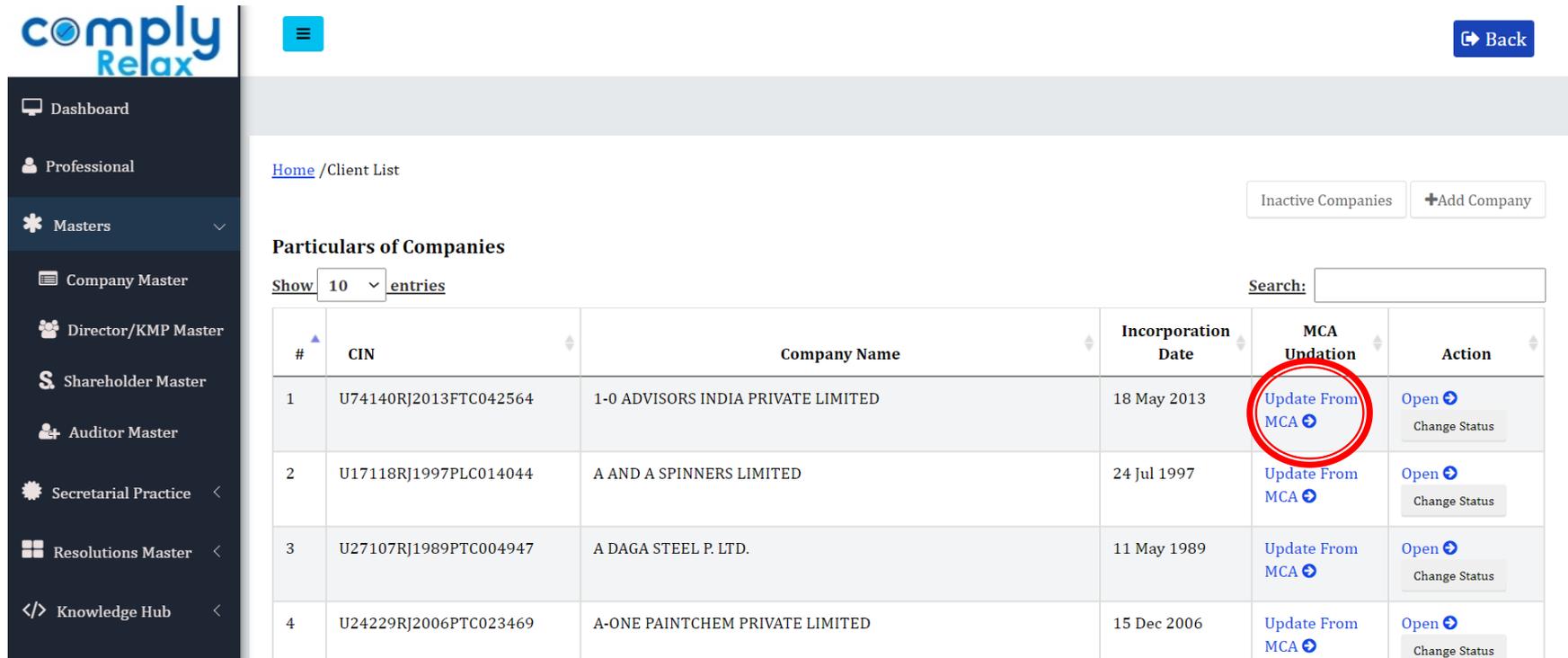
Steps: On the Dashboard Select > **Secretarial Practice** > **MCA Transaction** > **Fetch MCA Transactions** > **Select Username, Date (From-To)** and submit

# Get DIN Information

The screenshot displays the Comply Relax web application interface. On the left is a dark sidebar menu with the following items: Dashboard, Professional, Masters, Secretarial Practice (highlighted in blue), Annual Filing Status, DSC Management, DIR-3-KYC Status, MCA User, MCA Transaction, and DIN Information (circled in red). The main content area shows a breadcrumb trail 'Home /DIN Information' and a form with a text input field labeled 'DIN' containing the placeholder text 'Enter DIN', and a blue button labeled 'PREFILL FROM MCA' with a red arrow pointing to it. A 'Back' button is located in the top right corner. The text 'Activate Windows' is visible in the bottom right corner of the interface.

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

# Updation of Company's Master



The screenshot displays the 'comply Relax' software interface. On the left is a dark sidebar with navigation options: Dashboard, Professional, Masters (selected), Company Master, Director/KMP Master, Shareholder Master, Auditor Master, Secretarial Practice, Resolutions Master, and Knowledge Hub. The main content area shows the 'Client List' with a 'Back' button in the top right. Below the breadcrumb 'Home / Client List', there are buttons for 'Inactive Companies' and '+Add Company'. The section is titled 'Particulars of Companies' and includes a 'Show 10 entries' dropdown and a search box. A table lists four companies with columns for '#', 'CIN', 'Company Name', 'Incorporation Date', 'MCA Updation', and 'Action'. The 'Update From MCA' link for the first company is circled in red.

#	CIN	Company Name	Incorporation Date	MCA Updation	Action
1	U74140RJ2013FTC042564	1-0 ADVISORS INDIA PRIVATE LIMITED	18 May 2013	<a href="#">Update From MCA</a>	<a href="#">Open</a> <a href="#">Change Status</a>
2	U17118RJ1997PLC014044	A AND A SPINNERS LIMITED	24 Jul 1997	<a href="#">Update From MCA</a>	<a href="#">Open</a> <a href="#">Change Status</a>
3	U27107RJ1989PTC004947	A DAGA STEEL P. LTD.	11 May 1989	<a href="#">Update From MCA</a>	<a href="#">Open</a> <a href="#">Change Status</a>
4	U24229RJ2006PTC023469	A-ONE PAINTCHEM PRIVATE LIMITED	15 Dec 2006	<a href="#">Update From MCA</a>	<a href="#">Open</a> <a href="#">Change Status</a>

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

comply Relax

Home / Director

Directors Details

Show 10 rows Excel

Search:

+Add Director

#	Director Name	DIN	Email Id	Mobile	Address	DSC Expiry	DIN Status	DIR3KYC Status	Action
1	AABHAS GOYAL	08753366	aabhas.goyal99@gmail.com		74 Civil Lines Ajmer Rajasthan India 305001			Not eligible to file DIR-3 KYC for the current Financial Year.	
2	AARTHI SUBRAMANIAN	07121802						KYC Filed for financial Year 2021-	

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

# Updation of Shareholder Master

The screenshot displays the Comply Relax web application interface. On the left is a dark sidebar menu with the following items: Dashboard, Professional, Masters (highlighted in blue), Company Master, Director/KMP Master, Shareholder Master (circled in red), and Auditor Master. The main content area shows a breadcrumb trail 'Home / Shareholder' and a blue 'Back' button. Below the breadcrumb is the 'Shareholder List' section, which includes a 'Show 10 entries' dropdown and a search box. A red arrow points to a '+ Add Shareholder' button. The table below contains two entries:

#	Shareholder Name	Father Name	Category	Sub Category	Under Sub Category	Action
1	Abhay Jain	Ashish	Indian	Non Institutions	Individual	Edit ↕
2	Kishan Chand Daga	UMRAO	Indian	Non Institutions	Individual	Edit ↕

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

# Updation of Auditor Master

The screenshot displays the Comply Relax web application interface. On the left, a dark sidebar contains a navigation menu with the following items: Dashboard, Professional, Masters (highlighted in blue), Company Master, Director/KMP Master, Shareholder Master, Auditor Master (circled in red), Secretarial Practice, Resolutions Master, and Knowledge Hub. The main content area shows the breadcrumb 'Home /Auditors' and a '+ Add Auditors' button with a red arrow pointing to it. Below the button is a search bar labeled 'Search:'. The 'Auditors List' section features a table with columns: #, Firm Name, Auditor Name, Address, Email, Phone No, and Action. The table contains three rows, each with an 'Edit' and 'Delete' button in the Action column. A 'Show 10 entries' dropdown is located above the table.

#	Firm Name	Auditor Name	Address	Email	Phone No	Action
1						Edit Delete
2						Edit Delete
3						Edit Delete

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

# Updating Capital Structure

The screenshot shows the 'comply Relax' software interface. On the left, a dark sidebar contains a menu with items: Masters, Company, Director, Index of Charges, **Capital Structure** (circled in red), Shareholder, Share Certificate, Auditor, Meetings, and Corporate Actions. The main area is titled 'Particulars of Share Capital' and features four tabs: 'Authorized Capital', 'Issued Capital', 'Subscribed Capital', and 'Paid Up Capital'. Below the tabs, a message reads: 'The Authorized Capital of the company as per MCA data is Rs. 1,000,000. Kindly add bifurcation of the capital.' A table is displayed with the following columns: 'Authorized Share Capital', 'No. of shares', 'Nominal Value', 'Total amount', and 'Class, if any'. The 'Equity' row is highlighted with a blue plus sign. Below the table, there are input fields for 'Prefere', 'Unclass', and 'Total At'. The bottom right corner shows '©WS' and 'ivate Windows...'. In the top right corner, there are buttons for 'Switch Client' and 'Exit Company'.

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

# Creation of Share Certificates

The screenshot displays the Comply Relax software interface. On the left is a dark sidebar menu with the following items: Masters, Company, Director, Index of Charges, Capital Structure, Shareholder, Share Certificate (highlighted with a red circle), Auditor, Meetings, and Corporate Actions. The main content area shows a breadcrumb trail 'Home / Share Certificates' and a title 'Particulars of Share Certificate'. Below this is a table with the following data:

Shareholder Name	Class of Share	Folio No.	No of Share	Share Certificate	
				Inputs	Action
Remi Rathi	Equity		1	<a href="#">Add Details</a>	<a href="#">Signatory</a>

At the bottom right of the interface, there is a watermark that reads 'Activate Windows. Go to Settings to activate Windows.'

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

The screenshot displays the 'Comply Relax' software interface for '1-0 ADVISORS INDIA PRIVATE LIMITED'. The left sidebar contains a menu with 'Meetings' highlighted by a red circle. The main content area is titled 'Meetings' and features three colored buttons: 'Board Meetings' (orange), 'General Meetings' (teal), and 'Other Meetings' (purple). On the right side, there is a 'Meeting Records' section with a search bar and a table. The table has columns for '#', 'Financial Year', 'Notice Date', 'Meeting Date', and 'Action'. Below the table, it shows 'Showing 0 to 0 of 0 entries' and 'Previous Next' navigation. A red arrow points to the 'Add Meeting' button in the top right corner.

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

The screenshot displays the Comply Relax software interface for the company A-ONE PAINTCHEM PRIVATE LIMITED. On the left, a dark sidebar menu lists various functions: Masters, Meetings, Corporate Actions, Compliance Tracker, Associated Company, Annual Filing (highlighted with a red oval), Reports, and Do's & Dont's. The main content area features three large, colored buttons: a blue 'Board Report' button, a purple 'MGT9' button, and a teal 'Extension of AGM' button. Below each button is a 'Show More' link with a right-pointing arrow. Two red arrows point upwards towards the 'Board Report' and 'MGT9' buttons. In the top right corner of the main area, there is an 'Exit Company' button with a left-pointing arrow.

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

# Documents for Shifting registered office

The screenshot displays the Comply Relax web application interface. On the left, a dark sidebar contains navigation items: Masters, Meetings, Corporate Actions (circled in red), Compliance Tracker, Associated Company, Annual Filing, Reports, and Do's & Don't's. A red arrow points to the 'Registered Office' button in the 'Corporate Action' section. The main content area is titled 'Corporate Action' and features several buttons: Director & KMP, Auditors, Annual Filing, Registered Office, Transfer & Transmission of Share, and Share Capital. A red arrow points to the 'Registered Office' button. On the right, the 'Shifting of Registered office' page is shown, featuring a '+ Shift Registered office' button with a red arrow pointing to it. Below this is a search bar and a table with columns: #, Category, New Address, Premises, Effective Date, and Action. The table currently displays 'No data available in table'.

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

# Compliance Tracker

comply Relax

1-0 ADVISORS INDIA PRIVATE LIMITED

Switch Client

Exit Company

Home / Compliance-Tracker

+ Add Compliance-Tracker

### List of Compliance-Tracker

Show 10 rows Excel

Search:

#	Financial Year	Incorporation Date	Category	Action
1	2019-20	01 Jan 1970		<a href="#">Edit</a>

Showing 1 to 1 of 1 entries

Previous 1 Next

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