



Organization

Organization Setup Process:

- Go to the [System](#) menu.
- Click on [Organization setup](#).
- [Organization Setup](#) dialog box will open.

Organization Setup

Left Pane:

- ID: 1, Display ID: <ID>
- Name: <Organisation Name>
- Address: <Organisation Address>
- Registration No.: , Renewed till:
- PAN:
- Income Tax: , Income Tax Clearance Certificate Dated:
- SWC Reg. No.: , ☐ with Nepali Date
- Remarks:
- Fiscal-Year: Type: English, Default: 2023
- Base Currency: NPR, Signatory: ..

Right Pane: Existing Organization

ID	DisplayID	Description
1	<ID>	<Organisation Name>

Buttons: Add, Edit, Delete, Save, Cancel, Close

Status Bar: Record: 1 of 1, No Filter, Search

To edit /enter Organization Information in TrueBook, follow these steps:

- Select the Organization from the [Existing Records](#) List by clicking on it.
- Click the [Edit](#) Button
- Make necessary changes:
 - [Display ID](#) - short name (abbreviation) of the Organization
 - [Name](#) – Organization's full name
 - [Address](#) - Organization's address
 - [Registration No.](#) - Organization's registration number
 - [Renewed till](#) – Registration valid up to.
 - [PAN](#) – VAT / PAN / TPIN number of Organization
 - [Income Tax Clearance Certificate Dated](#) – Date of last tax clearance certificate date
 - [SWC Reg. No.](#) – Social Welfare Council registration number.
 - [Remarks](#) – Any remarks of the organization
- Activate the Nepali date option in the system by marking [with Nepali Date](#). This setting will display both Nepali and English (Gregorian) date fields in the system's data entry and reports.
- Select [Fiscal-Year Type](#) as per the organization financial cycle.
- Select [Default](#) Fiscal-Year. If the list is blank, define fiscal year first.
- Click [Save](#) Button to save the changes.
- Once the information is saved. You can add/edit signatory for consolidated reports.

To Add/Edit Signatory

- Select the Organization and click *Signatory* button.
- *Signatory Setup* dialog box will open.
- Fill the information and Click *Save* button.

	Signatory 1	Signatory 2	Signatory 3
Task	Prepared By	Verified By	Approved By
Name			
Title			

Note:

1. Cannot change *ID* of Organization
2. To add / Delete organization contact service provider.
3. Organization - Signatory will display in consolidated reports. It needs to be defined for each user individually.
4. Only 3 signatory is available in the system. If more signatory is required please refer "Report Header and Footer Setup"