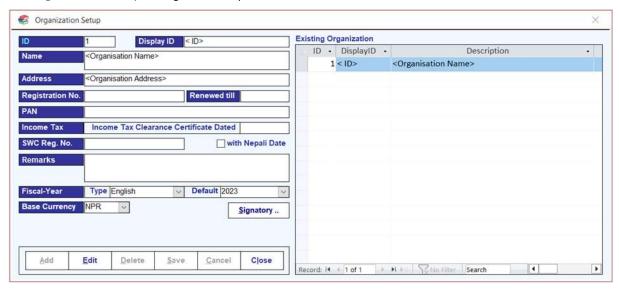




Organization

Organization Setup Process:

- Go to the *System* menu.
- Click on Organization setup.
- Organization Setup dialog box will open.



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.



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"