



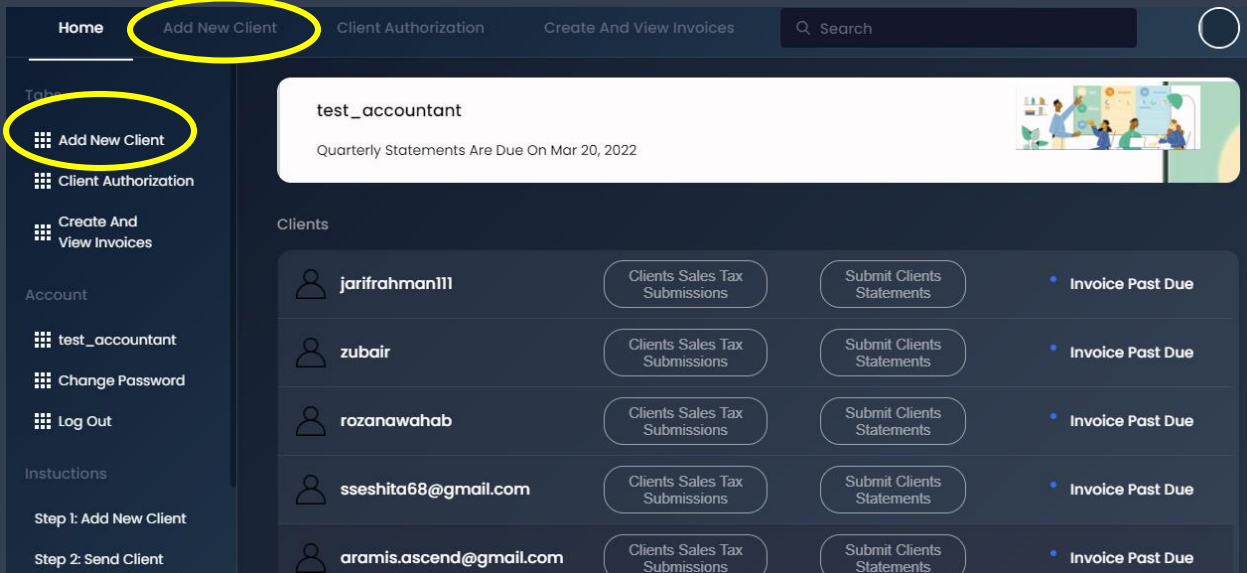
## Welcome to ACUTIRA!

Acutira is here to provide solutions to accelerate your business through digital transformation. We provide both canned and custom solutions to ensure a smooth business journey for you. Please let us know about your requirement so that we can work together to develop solutions.

### Accounting firm solutions:

1. Client management
2. Sales tax solution
3. Invoice management

# 1. Client Management



Home **Add New Client** Client Authorization Create And View Invoices Search

test\_accountant  
Quarterly Statements Are Due On Mar 20, 2022

Clients

jarifrahman111	Clients Sales Tax Submissions	Submit Clients Statements	• Invoice Past Due
zubair	Clients Sales Tax Submissions	Submit Clients Statements	• Invoice Past Due
rozanawahab	Clients Sales Tax Submissions	Submit Clients Statements	• Invoice Past Due
sseshita68@gmail.com	Clients Sales Tax Submissions	Submit Clients Statements	• Invoice Past Due
aramis.ascend@gmail.com	Clients Sales Tax Submissions	Submit Clients Statements	• Invoice Past Due

logged in as test\_accountant

## Create Client Account

email:

confirm email:

**Create Account**

### Step:1

- Click on **"Add New Client"** from the top menu bar.
- Put your clients email address for the username.
- Confirm Username.
- Press **"Create Account"**.

**Step:2**

- a. Create Company Profile
- b. Fill in the information.
- c. Press **“Create”**
- d. It will lead you to Client Authorization Request page

### CREATE COMPANY PROFILE

Client Code	DBA
<input type="text"/>	<input type="text"/>
Company Name	Description
<input type="text"/>	<input type="text"/>
Address 1	Address 2
<input type="text"/>	<input type="text"/>
City	County
<input type="text"/>	<input type="text"/>
Country	State
<input type="text"/>	<input type="text"/>
Zip	Tax ID
<input type="text"/>	<input type="text"/>
Contact	
First Name	Last Name
<input type="text"/>	<input type="text"/>
Business Phone	Mobile Phone
<input type="text"/>	<input type="text"/>
Fax	Email
<input type="text"/>	<input type="text"/>
Notes	
<input type="text"/>	

**CREATE**

### Step:3

- Select the company name from dropdown “Submit Request”.
- An email will be sent to your client with the username and auto generated password.
- After your client accepts and authorized your request you can View and Edit information submitted by your client.
- You can also check your client’s status from the below request table.

### Send Client Authorization Request

Accountant's Company Name:

Select A Company:

zafir shop

fffsd

zafir shop

Rozana

**Instructions:** Select your new clients name and press submit request.

### Requests:

client	authorized	log in
zafirrahman15@gmail.com	authorization and agreement provided	client has logged in
rozana.wahab@gmail.com	authorization and agreement provided	client has logged in
dolyafrin1989@gmail.com	no authorization and agreement provided	client has not logged in

### Step:4

- Click “Accountant Dashboard” on the upper left corner to get back to home.

Accountant Dashboard You are logged in as: test\_accountant [Logout](#)

You **must** submit a client authorization request after creating a new client account.






### Send Client Authorization Request

Accountant's Company Name:

Select A Company:

## 2. Sales Tax Solution

Clients

 jarifrahman111	<a href="#">Clients Sales Tax Submissions</a>	<a href="#">Submit Clients Statements</a>	<span>• Invoice Past Due</span>
 zubair	<a href="#">Clients Sales Tax Submissions</a>	<a href="#">Submit Clients Statements</a>	<span>• Invoice Past Due</span>
 rozanawahab	<a href="#">Clients Sales Tax Submissions</a>	<a href="#">Submit Clients Statements</a>	<span>• Invoice Past Due</span>
 sshita68@gmail.com	<a href="#">Clients Sales Tax Submissions</a>	<a href="#">Submit Clients Statements</a>	<span>• Invoice Past Due</span>
 aramis.ascend@gmail.com	<a href="#">Clients Sales Tax Submissions</a>	<a href="#">Submit Clients Statements</a>	<span>• Invoice Past Due</span>

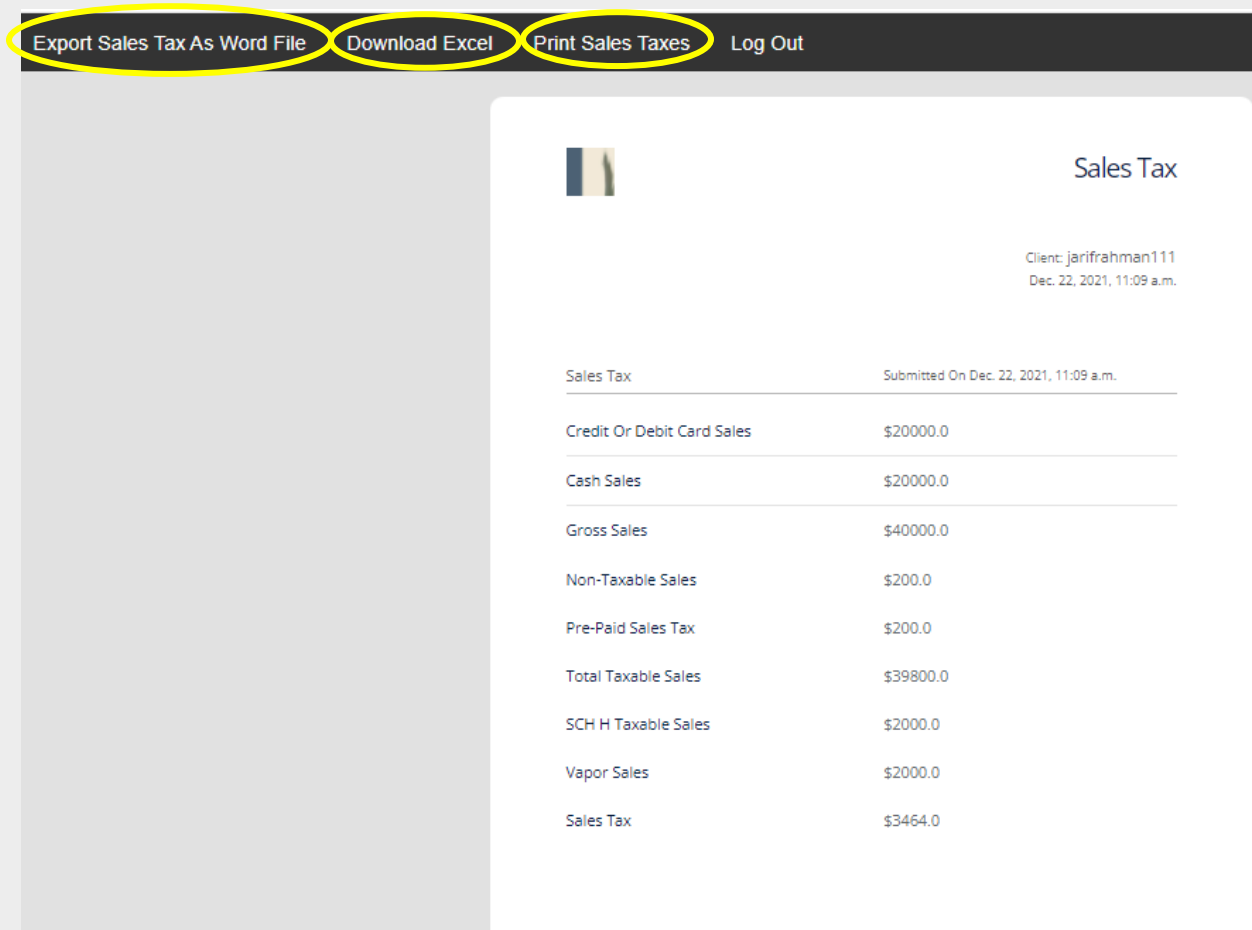
### Step:1

- To see Clients Sales Tax Submissions, Click on **“Clients Sales Tax Submissions”** from the client list on your dashboard.


## Step:2

- a. If your client has already submitted his/her sales tax from their Acutira Dashboard you can see an information table like **Case:1**
- b. You can **“Export the Sales Tax as Word File” “Download Excel” or “Print Sales Taxes”** from the top menu bar.

### Case:1



Export Sales Tax As Word File   Download Excel   Print Sales Taxes   Log Out



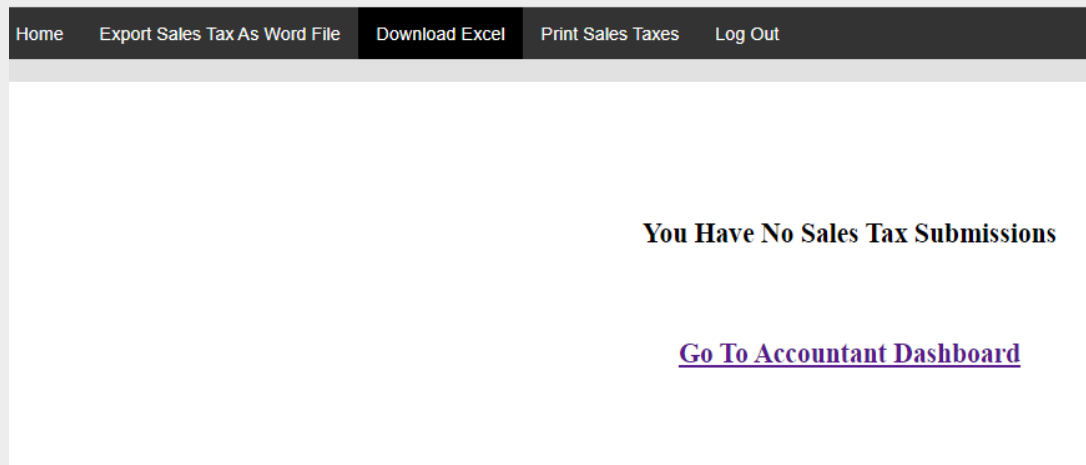
## Sales Tax

Client: jarifrahman111  
Dec. 22, 2021, 11:09 a.m.

Sales Tax	Submitted On Dec. 22, 2021, 11:09 a.m.
Credit Or Debit Card Sales	\$20000.0
Cash Sales	\$20000.0
Gross Sales	\$40000.0
Non-Taxable Sales	\$200.0
Pre-Paid Sales Tax	\$200.0
Total Taxable Sales	\$39800.0
SCH H Taxable Sales	\$2000.0
Vapor Sales	\$2000.0
Sales Tax	\$3464.0

- c. If your client hasn't submitted the sales tax, you will see a table like **Case 2.**

### Case:2



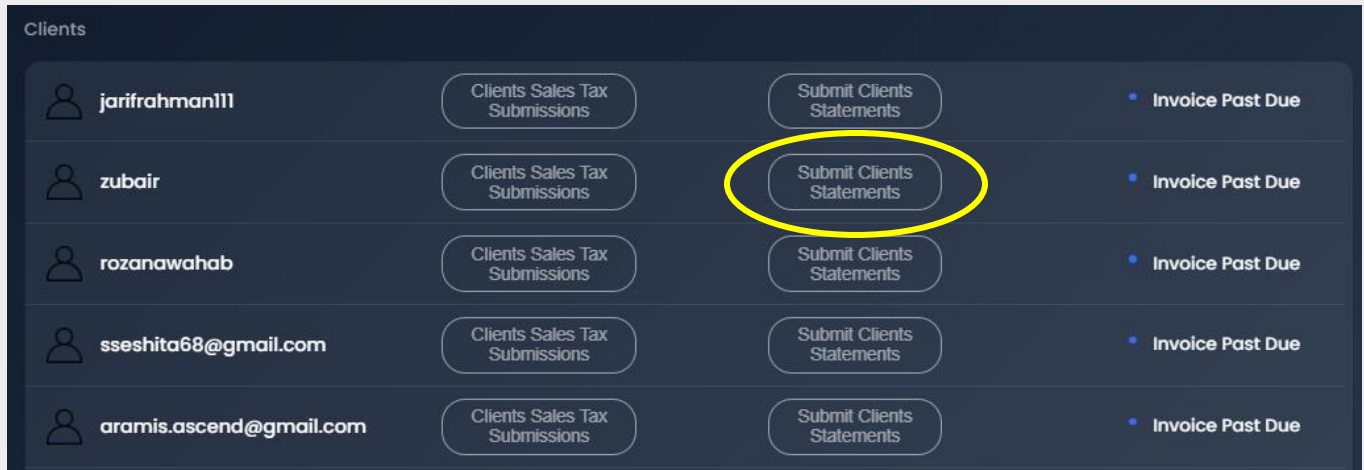
Home   Export Sales Tax As Word File   Download Excel   Print Sales Taxes   Log Out

**You Have No Sales Tax Submissions**

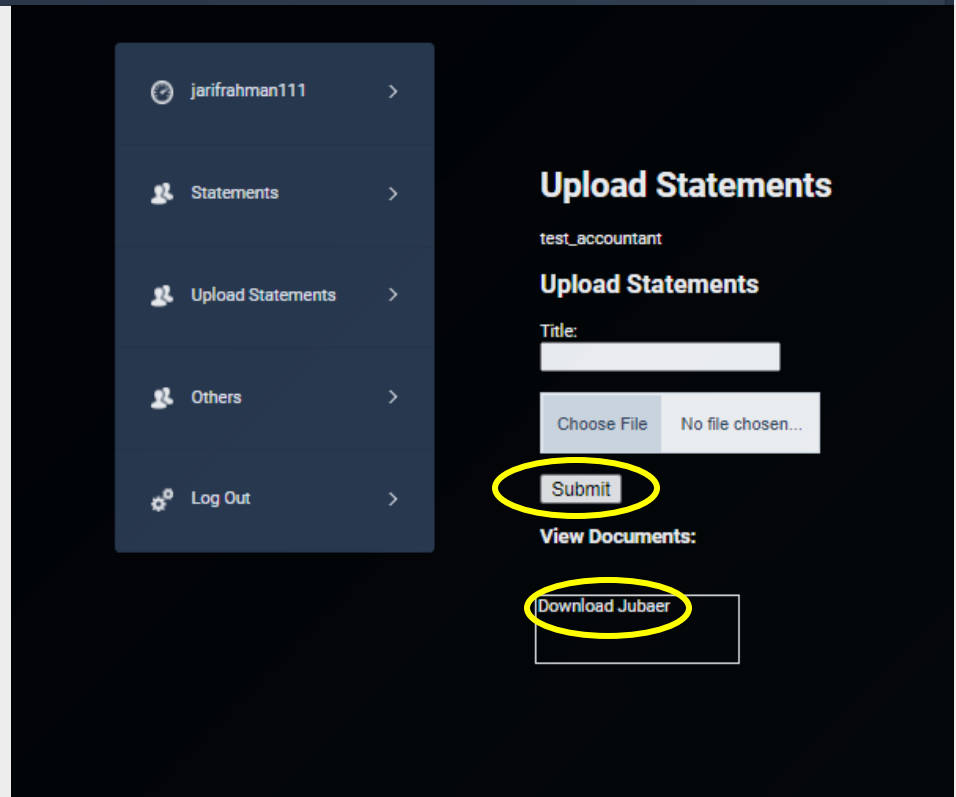
[Go To Accountant Dashboard](#)

### Step:3

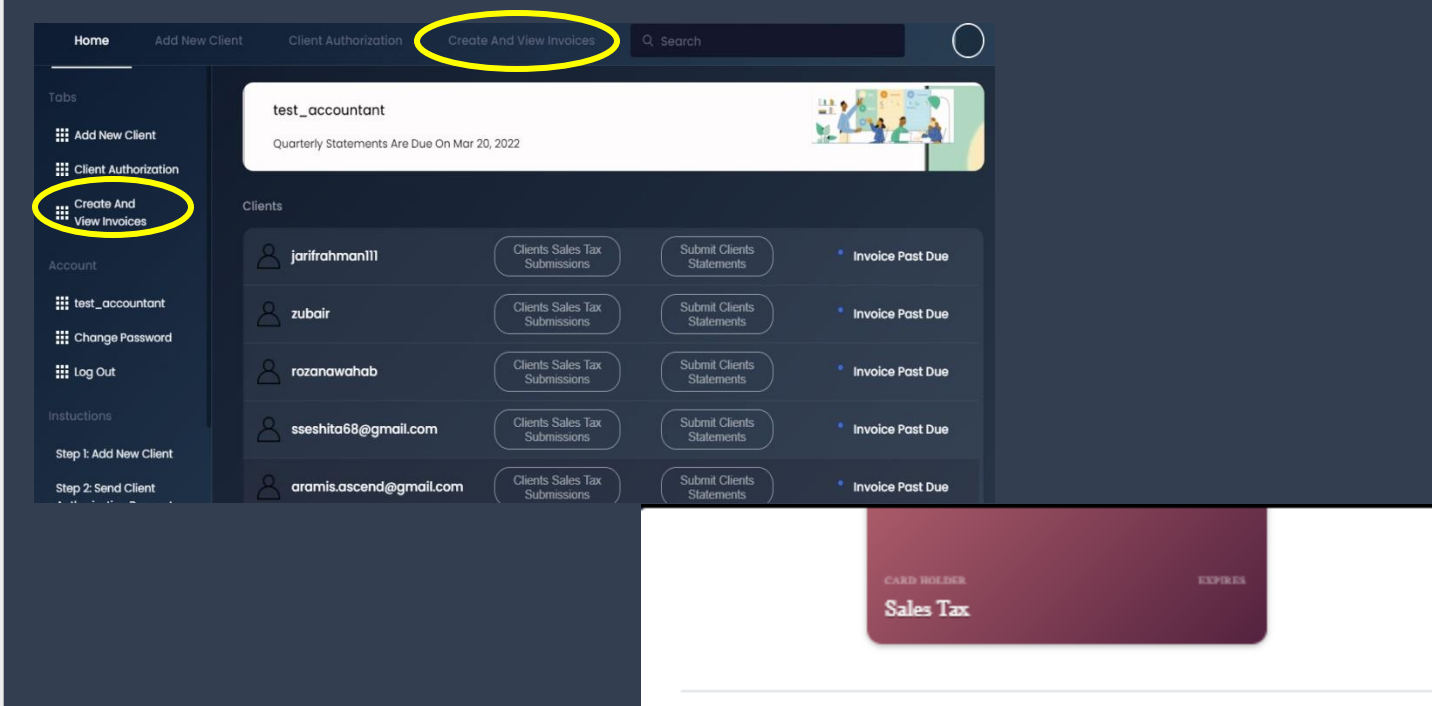
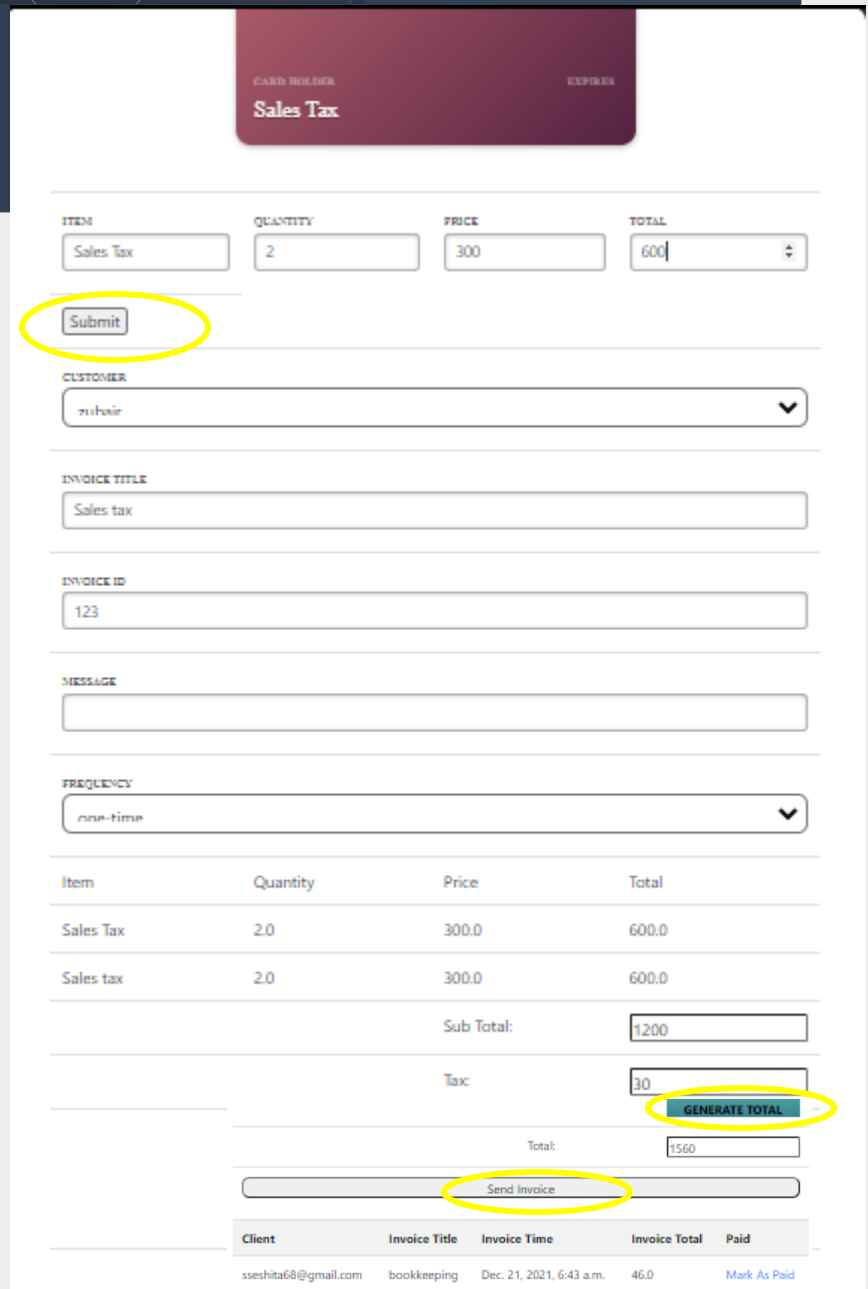
- a. Before submitting to government, you can send the final sales tax document to your client to verify by clicking **“Submit Clients Statements”**.



- b. It will lead you to this window
- c. To upload the document, put the company name in the title.
- d. Choose the file from your computer.
- e. Press **“Submit”**
- f. You can download and view the uploaded file by clicking **“Download”**



### 3. Invoice Management

The screenshot shows the invoice creation form with the 'Submit' button and 'GENERATE TOTAL' button circled in yellow. The form includes fields for 'ITEM', 'QUANTITY', 'PRICE', and 'TOTAL'. Below the form is a table with columns for 'Item', 'Quantity', 'Price', and 'Total'. The table shows two rows for 'Sales Tax' with a quantity of 2.0, a price of 300.0, and a total of 600.0. The 'Sub Total' is 1200, and the 'Tax' is 30. The 'GENERATE TOTAL' button is circled in yellow.

ITEM	QUANTITY	PRICE	TOTAL
Sales Tax	2	300	600

Item	Quantity	Price	Total
Sales Tax	2.0	300.0	600.0
Sales tax	2.0	300.0	600.0
Sub Total:			1200
Tax:			30
Total:			1560

#### Step:1

- To Create Invoice, click **“Create and View Invoice”** on your dashboard.
- It will lead you to this window.

#### Step:2

- Fill up the **“ITEM”**, **“QUANTITY”**, **“PRICE”** & **“TOTAL”** then press **“Submit”**.
- Once you have **submitted** bills for all the items, fill in the below details, such as **“CUSTOMER”**, **“INVOICE TITLE”**, **“INVOICE ID”**.
- You can see the **“Sub Total”** at the below of the form.
- Ad Tax and click on **“Generate Total”**
- To send the invoice to your client, click on **“SEND INVOICE”**.