TreezSoft

Getting Started Manual

For TreezSoft Accounting

Last Update: 1st November 2024

For information about customer support, please visit our homepage at http://www.treezsoft.com on the World Wide Web.

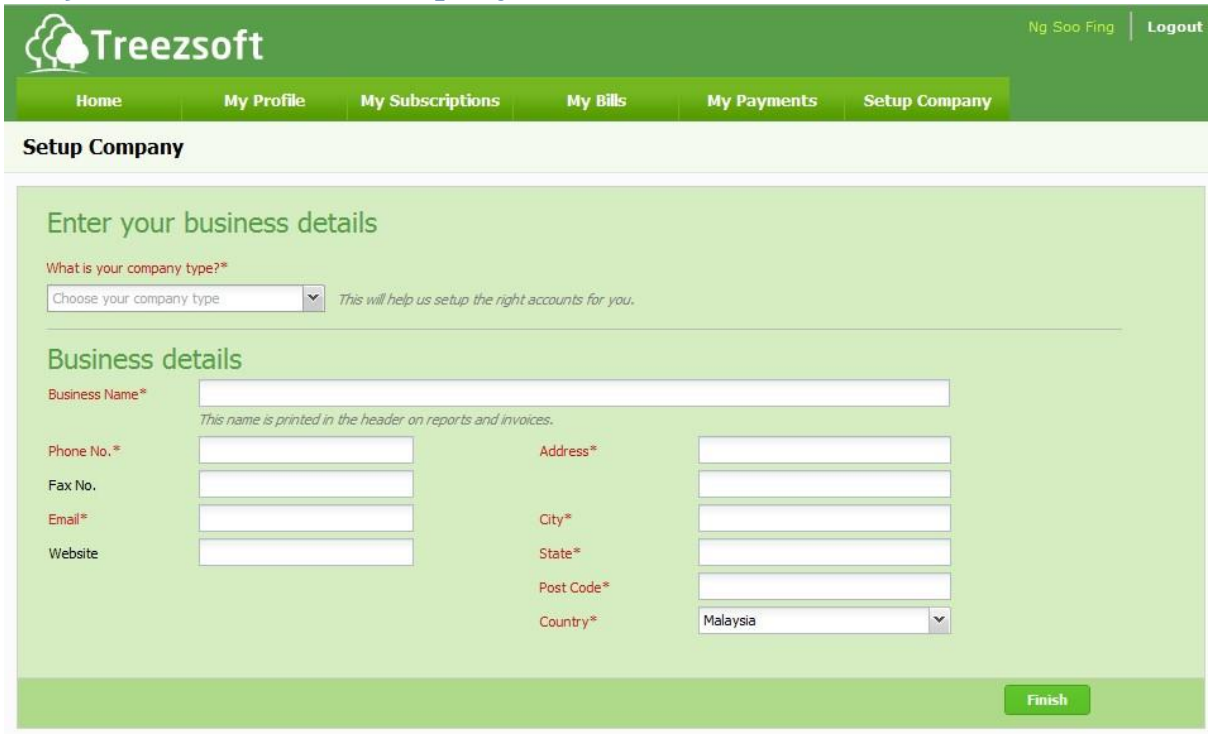
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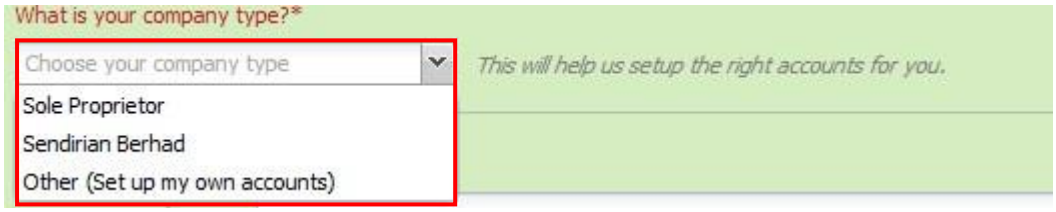
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Step 1: Getting Started

1) How to create a company?



First, you need to choose your company type:



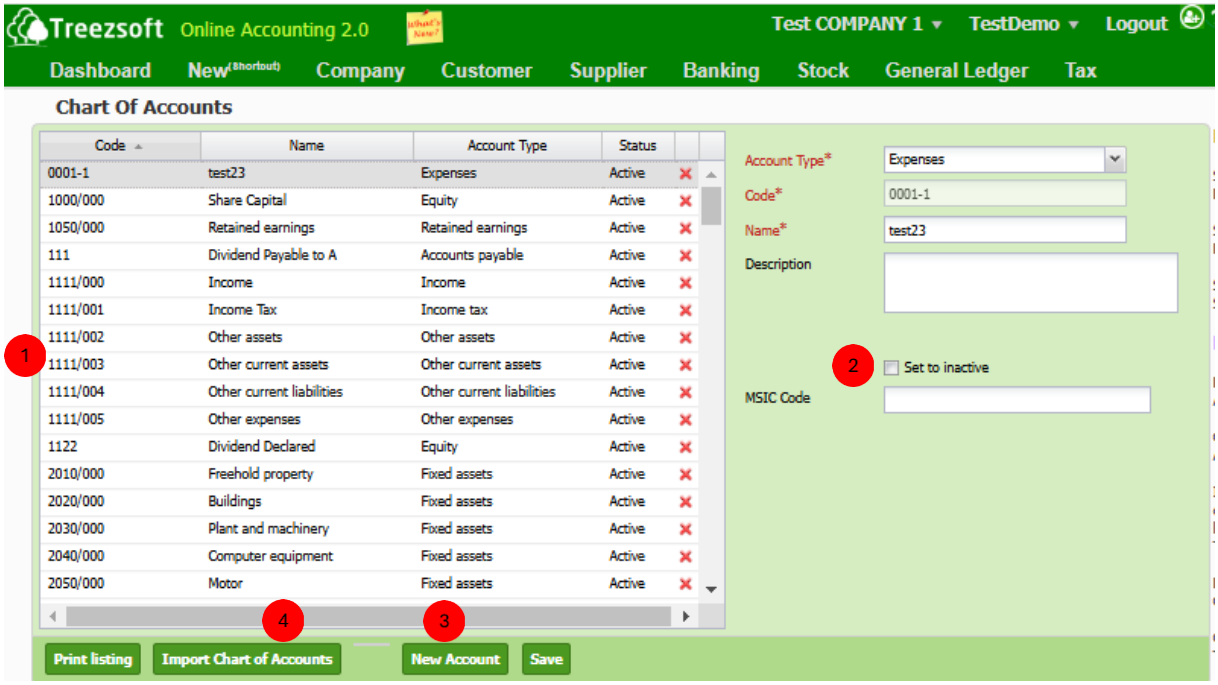
a) There are three selections of commonly use company types: Sole Proprietor and Sendirian Berhad; the last one is Other type.

- If you select any of the first two (**Sole Proprietor/Sendirian Berhad**), the respective Chart of Accounts (COA) will be loaded.
- If you select **Other type**, COA will not be loaded and you have to set up your own COA.

Next, enter your business details…

2) Setting up Chart of Accounts

Setting up your COA, is the second thing you should do after entering business details:

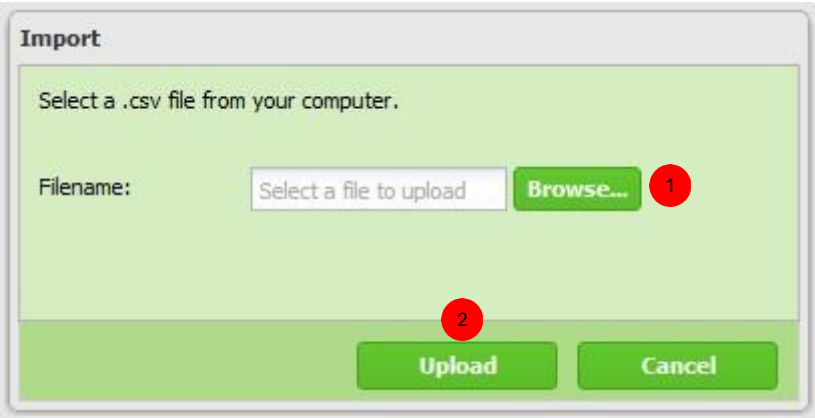


1. This is the list of COA, you can edit them by choosing the account you wish to edit.

2. If you no longer wish to use a previous account and wish to disable it, simply choose the account and tick on the **Set to inactive** or **Delete**(using the red cross) to remove unused Accounts.

3. To create a new account, click on the **New Account** button.

4. To import your existing COA, click on **Import Chart of Accounts** button



You will see this screen after you click on the import button.

1. To import your data, click on **Browse** to select the .csv file which you have edited.
(Please ensure the exact file is selected otherwise error message will be prompt.)

2. Click on **Upload** to proceed.

Preparing the Chart of Accounts import file

a) Download the blank formatted CSV from
http://www.treezsoft.com/sample-import/download.php?file=Chart%20of%20Accounts.csv

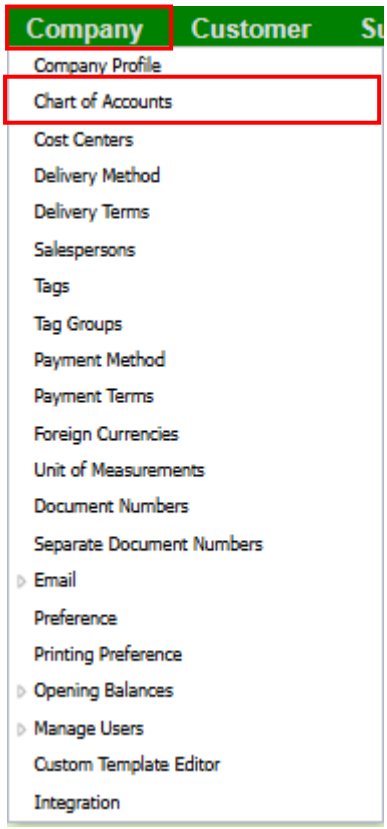
b) Edit the CSV using Excel

c) Refer to the table below on the columns and restrictions when filling the data

Column	Description	Size	Mandatory
Account Type	Define the account class, accepted values: Accounts receivable, Accounts payable, Cash and bank, Cost of sales, Current assets, Current liabilities, Equity, Expenses, Fixed assets, Income, Income Tax, Liabilities & Equity, Long term liabilities, Operating expenses, Other assets, Other current assets, Other current liabilities, Other expenses, Other income, Retained earnings, Revenues, Stock, Stock closing balance, Stock opening balance		Yes
Code	The account code	35	Yes
Name	Name of the account	255	Yes
Description	Description of the account	255	Optional

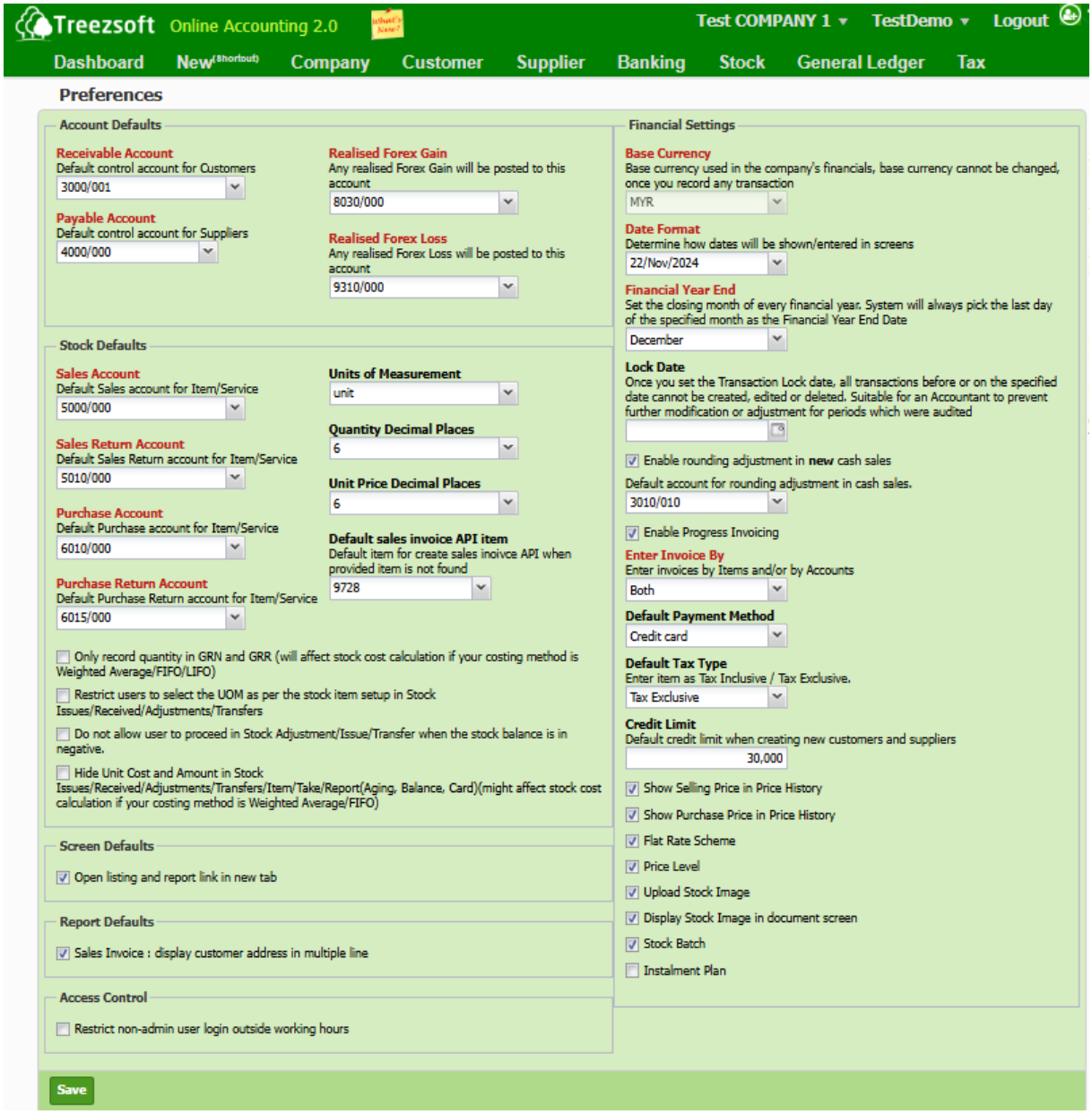
Type	Only for Cash and bank type accounts, accepted values are: Cash, Savings, Current account, Other accounts		Yes (for bank only)
Account No.	Bank account number	255	Optional
Currency	Currency of the bank account		Yes (for bank only)

WHERE TO FIND CHART OF ACCOUNTS?



3) How to change Preferences?

The third setting you should determine is your account preferences:



It is always advisable to change your account preferences once you have completed the first two steps to avoid errors in your business recording later.

Account Defaults: This section allows you to change your accounts setting. Please be mindful and decide which accounts you want the transactions to be posted to. The account you have selected here will be used as the default posting account for the related transactions recorded.

Stock Defaults: This section allows you to edit the default settings and parameters related
to stock (inventory) management within the system. All stock-related transactions will automatically be posted to the specified default accounts if a specific account is not

assigned during the initial company setup. You can also modify the default recording configuration for stock items

Screen Default: This section allows you to set display preferences for how listings and reports open within the system. Tick **Open listing and report link in new tab** if you want all listing and report opened in a separate tab.

Report Default: The Report Default allows you to set preferences for display of certain report details. Tick **Sales Invoice: display customer address in multiple lines** if you want customer's address to be appeared in a multi-line format on sales invoice reports

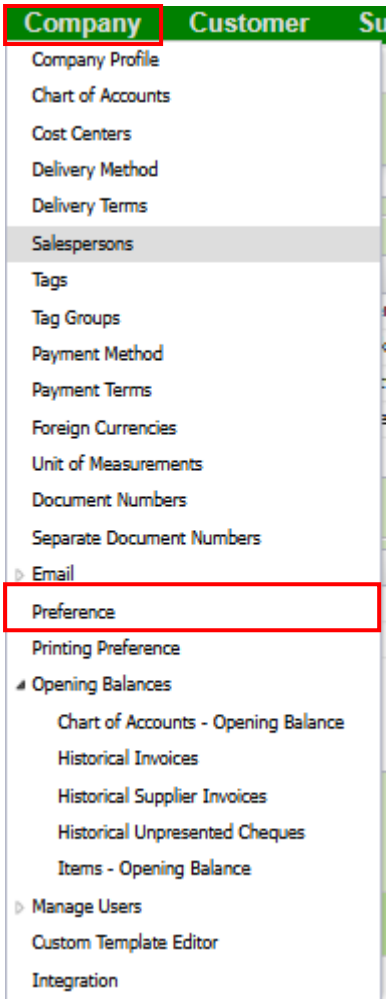
Access Control: The **Access Control** allows you to enhance security by restricting login access for non-admin users outside of designated working hours. Tick
Restrict non-admin user login outside working hours and define specified working days and hours for system to specify login restriction if you only non-admin users will be limited to logging in only during defined working hours.

Financial Settings: In this section, you will have to decide which based currency you want to use, and it cannot be changed once, at least one transaction has been recorded.

WHERE TO FIND Preference?

Under **Company** module,

- **Preference**

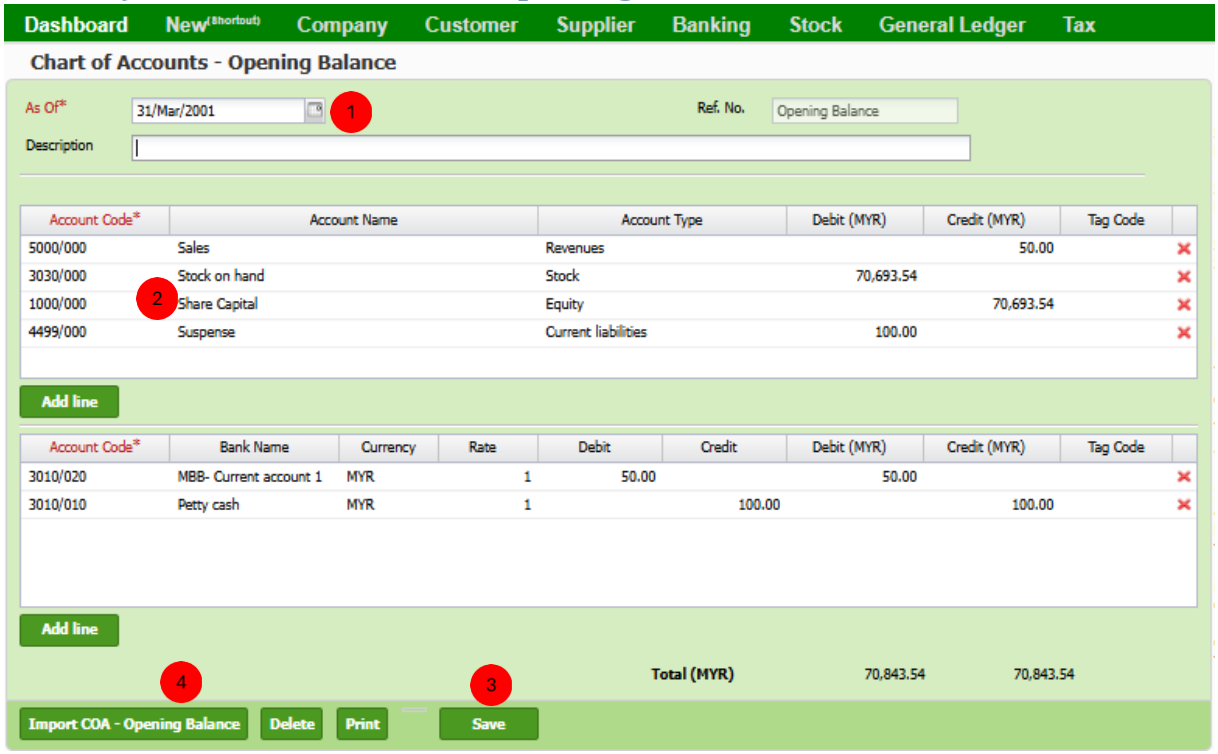


Step 2: Chart of Accounts -Opening Balance

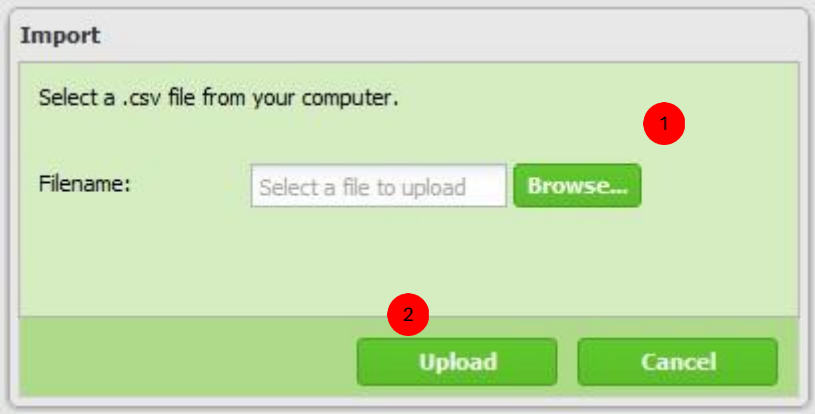
What is Opening Balance?

Opening balance is the amount of funds in a company's account at the beginning of a new financial period. However, you are only required to do this opening balance once, which is for the time you start using TreezSoft Accounting.

1) Chart of Accounts – Opening Balance



1. Enter the date for your opening balance.
2. Input all the information to the fields accordingly.
3. Click on **Save** to record the information
4. Click on **Import COA – Opening Balance** to import the COA by using our template.



You will see this screen after you click on the import button.

1 To import your data, click on **Browse** to select the .csv file which you have edited.
(Please ensure the exact file is selected otherwise error message will be prompt.)

2 Click on **Upload** to proceed.

Preparing the Chart of Accounts – Opening Balance import file

a) Download the blank formatted CSV from
http://www.treezsoft.com/sample-import/download.php?file=COA-OB.csv

b) Edit the CSV using Excel

c) Refer to the table below on the columns and restrictions when filling the data

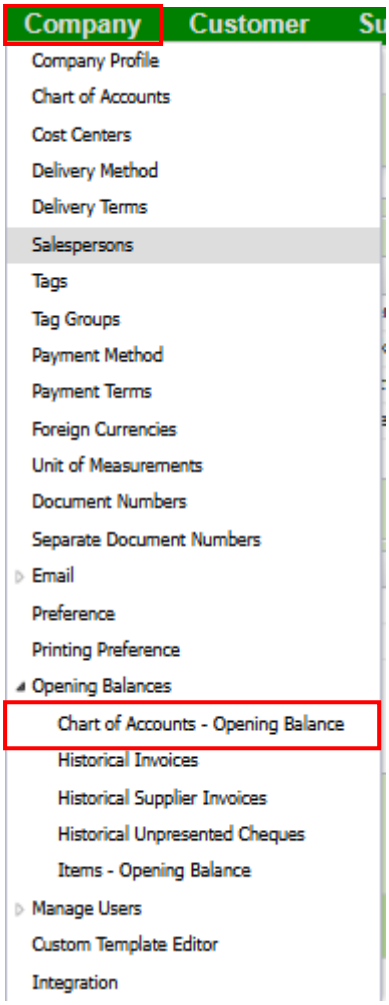
Column	Description	Size	Mandatory
Account Code	The account code, based on the Account Type	35	Yes
Debit	The debit amount		Yes
Credit	The credit amount		Yes
Debit in Foreign Currency	The debit amount in foreign currency other than your based currency		Yes

Credit in Foreign Currency	The credit amount in foreign currency other than your based currency		Yes

WHERE TO FIND CHART OF ACCOUNTS – OPENING BALANCE?

Under **Company** module, under **Opening Balances** dropdown list

- **Chart of Accounts – Opening Balance**

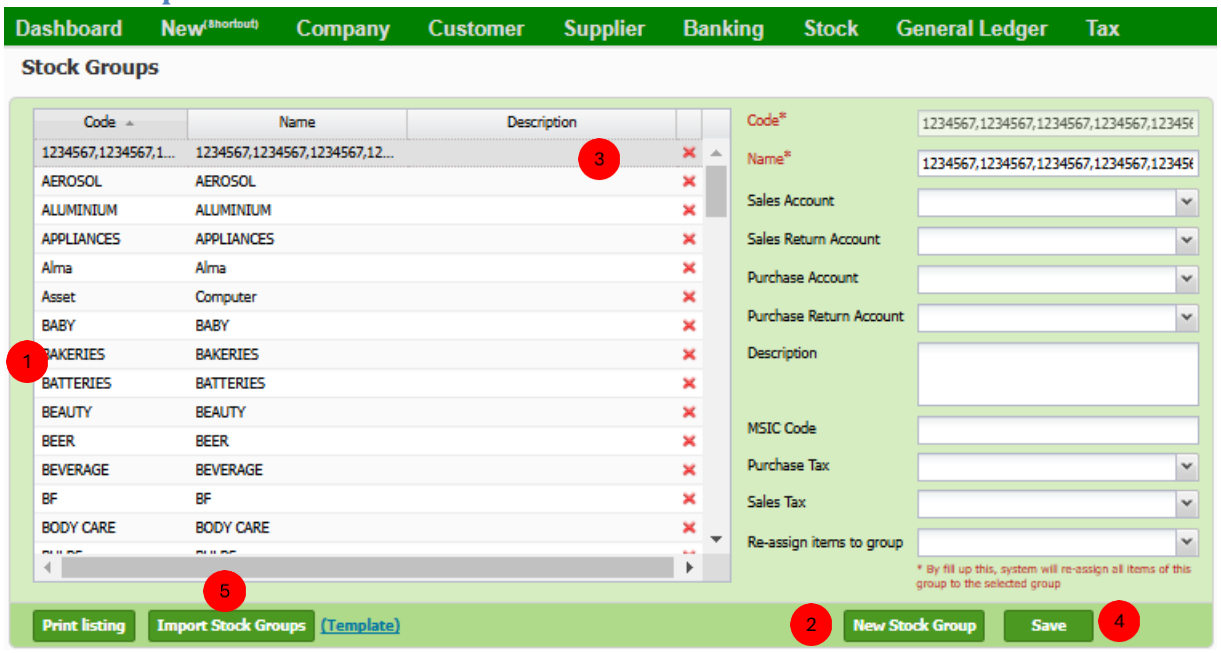


Step 3: Setting Up Your Inventory

It is important to have your chart of accounts properly set up to avoid errors when you create your inventory. It is because you are advised to associate your stocks in your inventory to their control accounts directly. Therefore, the first step to set up your inventory will be to make sure your Stock Groups are properly created.

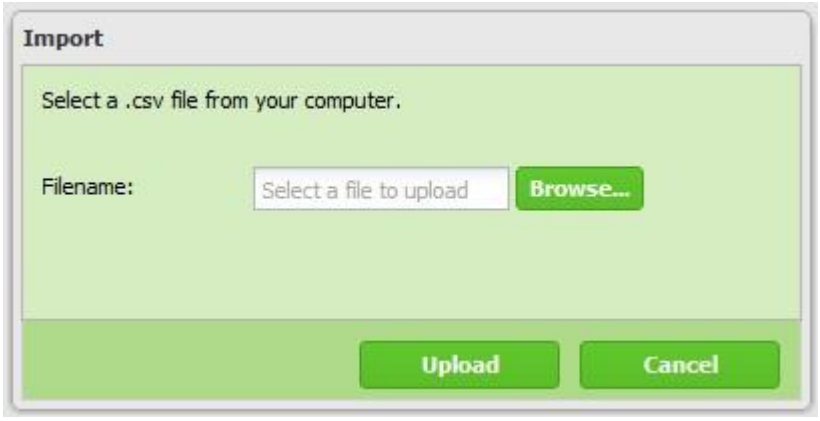
1. Managing Stock Groups

Stock Groups



1. This screen shows the full list of stock groups you have created.
2. To create a stock group, you have to click on **New Stock Group** at the bottom. Fields mark with asterisk (*) are required fields.
3. If you want to edit a stock group which you have created earlier, select the stock group and then you can edit on the right.
4. Click **Save** to save your records
5. To import existing stock groups, Click Import Stock Groups

*If you wish to post your sales, purchases accounts for the items separately then you need to specify the respective accounts. Otherwise the system will use the **Stock Defaults** in preferences.*



You will see this screen after you click on the import button.

1. To import your data, click on **Browse** to select the .csv file which you have edited.
   (Please ensure the exact file is selected otherwise error message will be prompt.)

2. Click on **Upload** to proceed

Preparing the Stock Group import file

a) Download the blank formatted CSV from
http://www.treezsoft.com/sample-import/download.php?file=COA-OB.csv

b) Edit the CSV using Excel

c) Refer to the table below on the columns and restrictions when filling the data

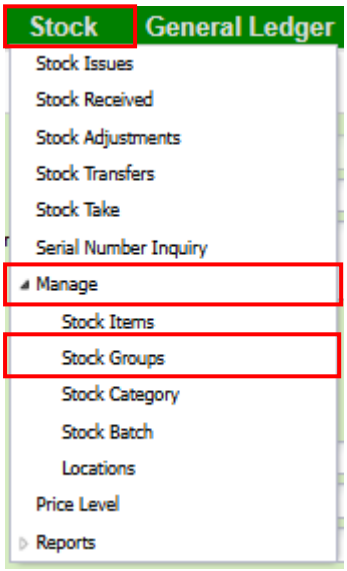
Column	Description	Size	Mandatory
Code	A unique identifier for the stock group.	35	Yes
Name	The name of the stock group.		Yes
Sales Account	The account linked to sales transactions for items in this stock group.		Yes
Sales Return Account	The account used to record returned sales for items in this stock group.		Yes
Purchase Account	The account linked to purchase transactions for items in this stock group.		Yes

Purchase Return Account	The account used to record returned purchases for items in this stock group.		Yes
Description	Additional information or notes about the stock group.		Yes

WHERE TO FIND Stock Group?

Under **Stock** module, under **Manage** dropdown list

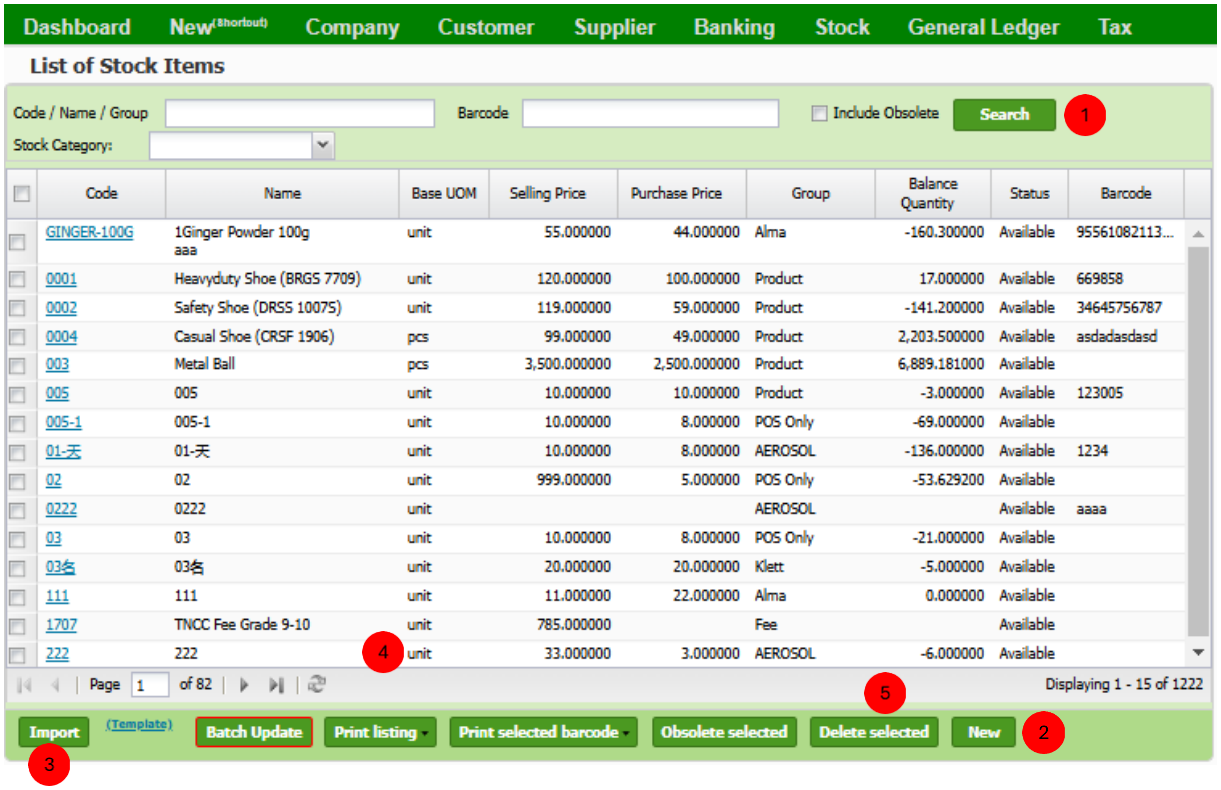
Stock Group



2. Managing Stock Items

You can now proceed to manage your stock items after managing the stock groups.

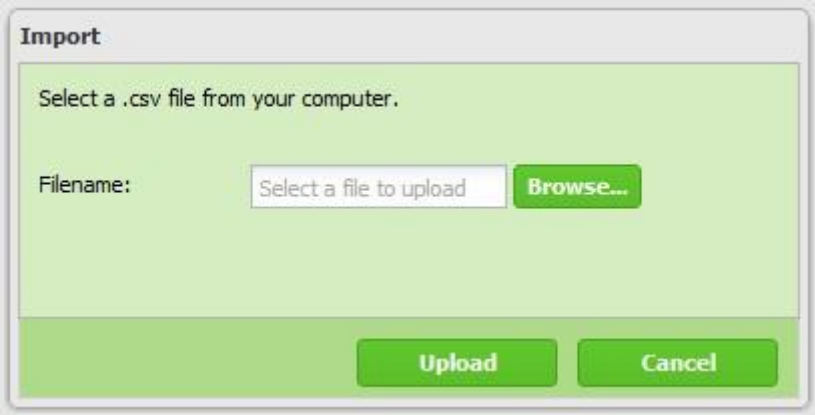
Stock Items



This screen will show you the list of stock items in hand.

1. To search for a particular items, enter you criteria and click on the **Search** button
2. Click **New Stock Item** to create a stock item.
3. You can also import your stock items list by the **Import Stock Items** button on the bottom left. The steps to import stock items will be explained in the next step.
4. **Print listing** allows you to print the full list of stock items.
5. Click **Delete selected record(s)**" to delete a selected record. Please be mindful that the process is irreversible.

3. Importing Stock Items



You will see this screen after you click on the import button.

1. To import your data, click on **Browse** to select the .csv file which you have edited.
   (Please ensure the exact file is selected otherwise error message will be prompt.)

2. Click on **Upload** to proceed

Note: Maximum 1000 items only for each of times import

Preparing the Stock Items import file

a) Download the blank formatted CSV from
http://www.treezsoft.com/sample-import/download.php?file=Stock%20Items.csv

b) Edit the CSV using Excel

c) Refer to the table below on the columns and restrictions when filling the data

Column	Description	Size	Mandatory
Code	The stock item's code	35	Yes
Name	The stock item's name	255	Yes
Stock Group	The group or category where stock item is categorized.	35	Yes

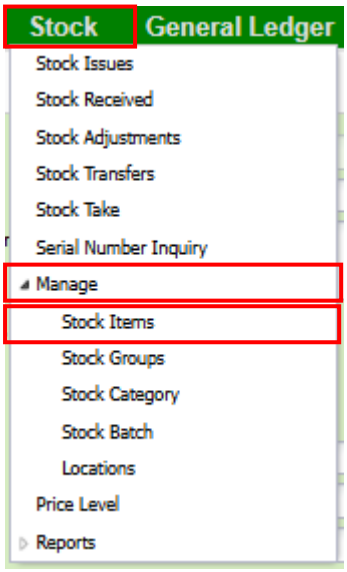
Stock Control	If it is a physical item : Yes If it is a service item : No		Yes
Costing Method	The costing method of the stock items : There are 4 types, which are : Fixed Cost, Weighted Average, FIFO, LIFO		Yes
UOM	The unit of measurement	60	Yes
Selling Price	The stock item selling price		Yes
Purchase Price	The stock item purchase price		Yes
Standard Cost	The stock item standard cost		Optional
Barcode	The stock item's barcode.	255	Optional
Contain Serial No.	If the stock item contains Serial No.: Yes If the stock item does not contains Serial No.: No		Mandatory
Sales Tax	The tax rate or code applied when the specific stock item is sold to a customer.		
Purchase Tax	The tax rate or code applied when the specific stock item is purchased from a supplier.		

Reminder: Only 1000 items are allowed to be imported each time you

WHERE TO FIND Stock Items?

Under **Stock** module, under **Manage** dropdown list

Stock Items

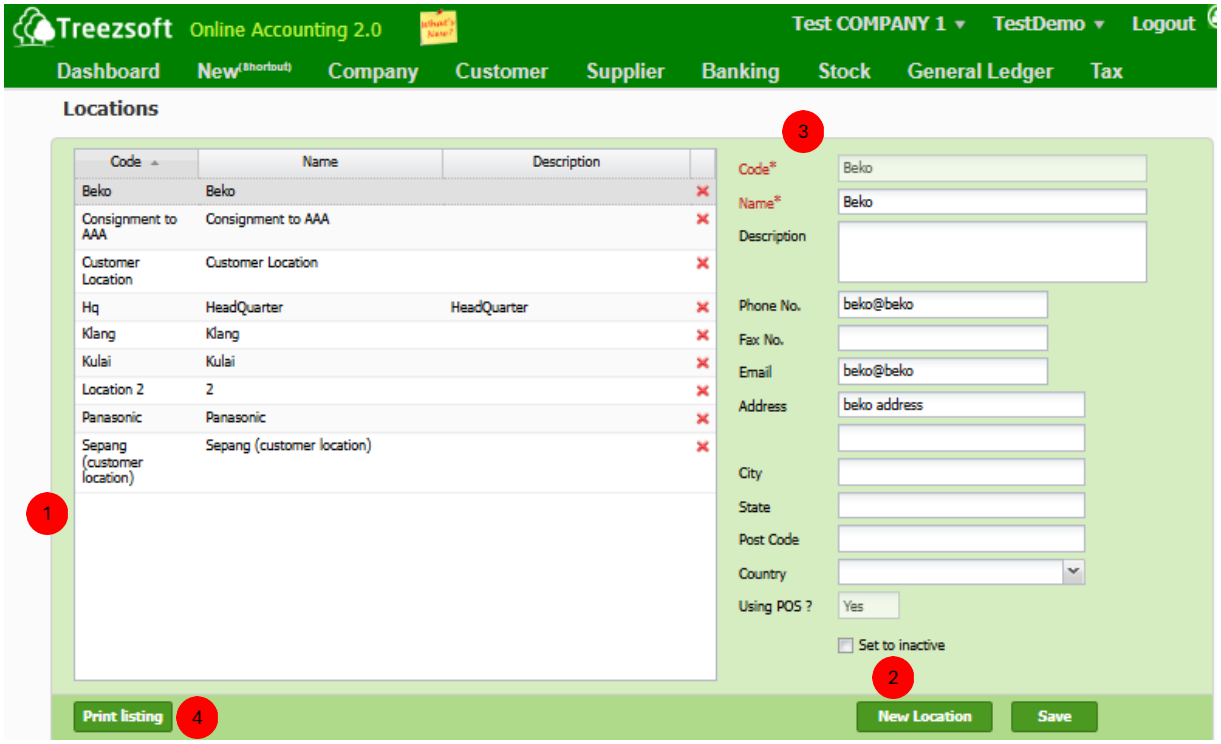


4. Setting up your Locations (Branches)

If you have more than one branch, we would advise you to set up your locations accordingly so your stock controls will be easier and more accurate.

Locations

It is easy to set up your locations. Simply go to the locations tab, which also falls under the stock item and stock group category.



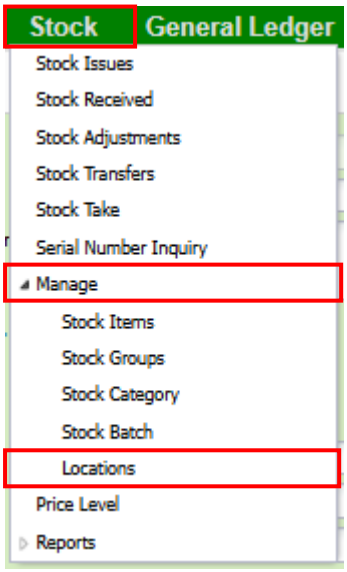
1. This screen will show all the locations you have created.
2. To create a new location, click on **New Location.** Fields mark with asterisk (*) are required fields.

   *If the location is no longer valid or inactive, you can **set it to inactive**.*
3. To edit a location, select the location and you can edit on the right.
4. **Print listing** allows you to print the list of locations. Click on **Save** to save your record.

WHERE TO FIND Locations?

Under **Stock** module, under **Manage** dropdown list

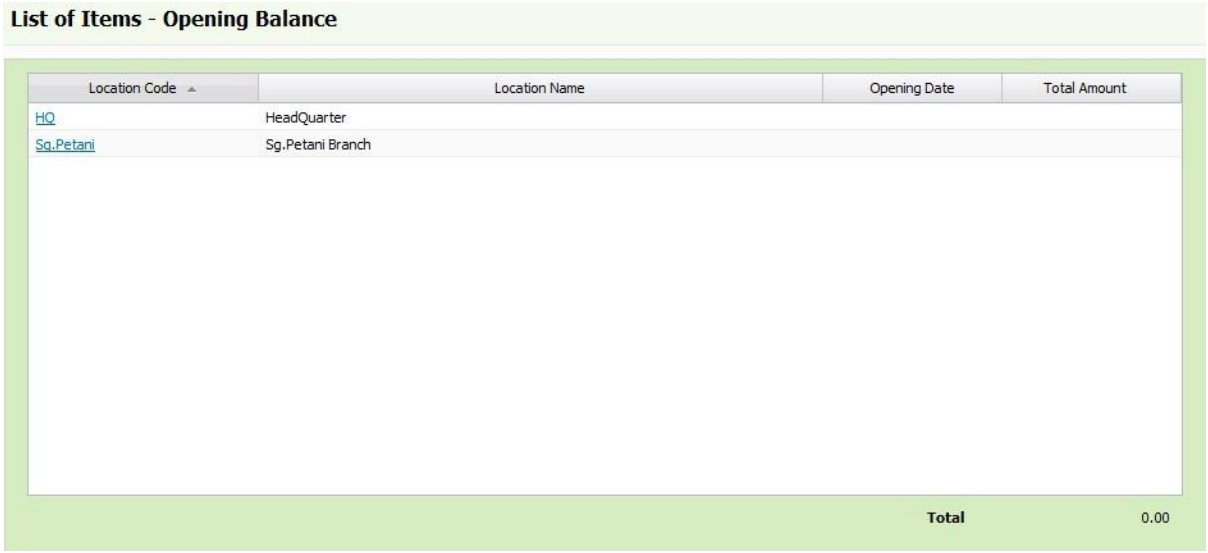
Locations



5. Items Opening Balance

After you have setting up all steps above, you can then proceed to do the opening balances for your items.

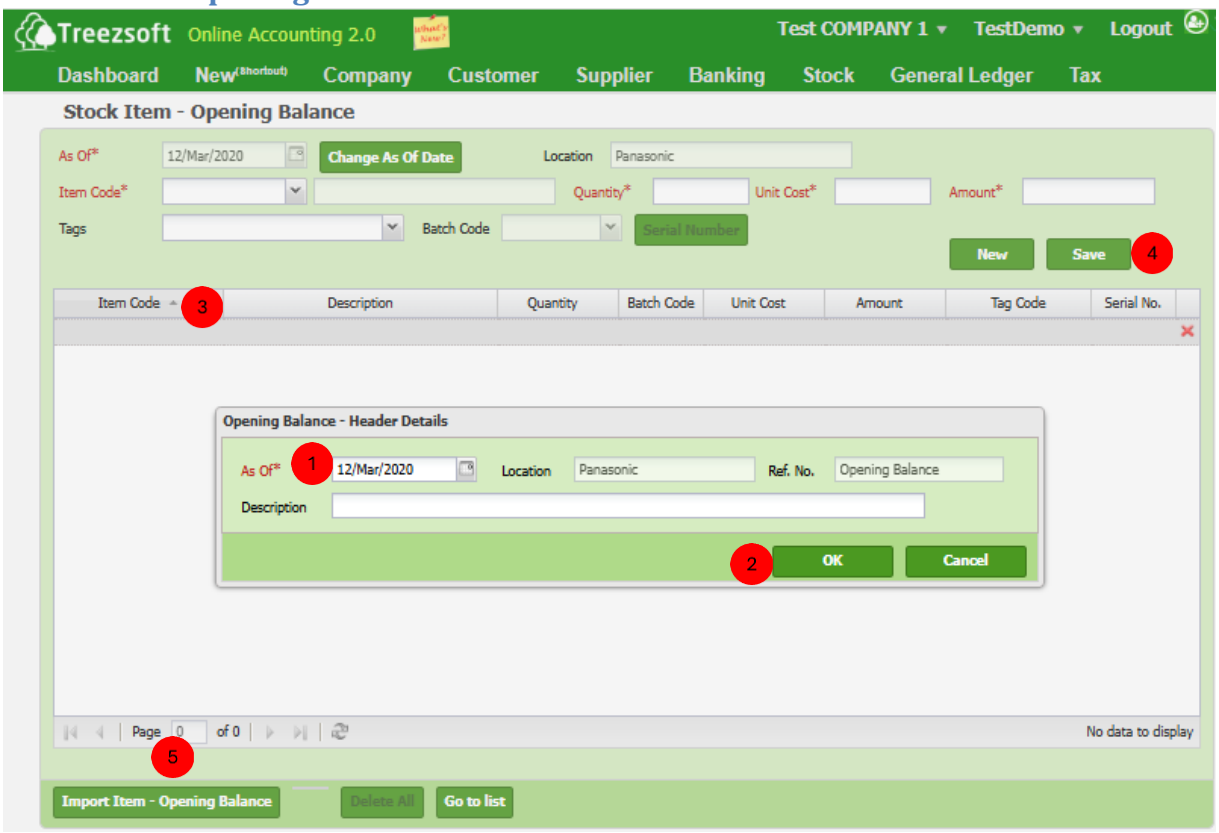
Items – Opening Balance



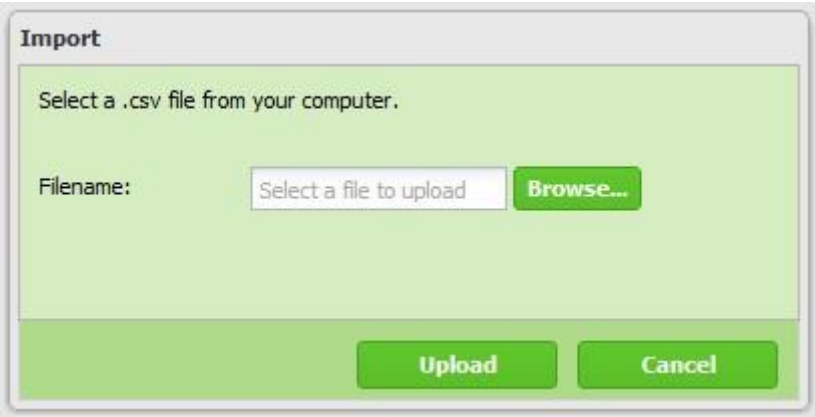
In this screen, you can see all of your currently in use locations, and the total amount of items they have. Click on a particular location will enable you to adjust the opening balance for it.

The next screenshot is the opening balance screen for your items…

Stock Item – Opening Balance



1. Enter the date for your stock item – opening balance in **"As of"** date field.
2. Enter the description for it in the Description field. Click **OK** to proceed.
3. Select item in the **Item Code** field, and enter all the required fields
4. Click **Save** to record the stock balance. Click **New** to add another item.
5. You can also choose to import your items for your opening balance by clicking on **Import Item – Opening Balance**.
   Fields mark with asterisk (*) are required fields.



You will see this screen after you click on the import button.

1. To import your data, click on **Browse** to select the .csv file which you have edited.
   (Please ensure the exact file is selected otherwise error message will be prompt.)

2. Click on **Upload** to proceed

Preparing the Stock Items – Opening Balance import file

a) Download the blank formatted CSV from http://www.treezsoft.com/sample-import/download.php?file=Items%20%20Opening%20Balance.csv

b) Edit the CSV using Excel

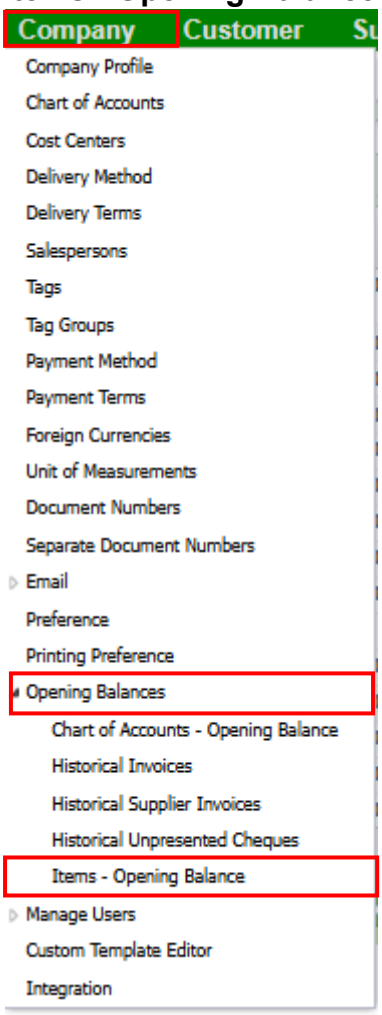
c) Refer to the table below on the columns and restrictions when filling the data

Column	Description	Size	Mandatory
Item Code	The stock item's code	35	Yes
Quantity	The stock item's in hand quantity during your opening balance		Yes
Unit Cost	The stock item's unit cost		Yes
Amount	The total amount of the stock item		Yes

WHERE TO FIND Items- Opening Balance?

Under **Company** module, under **Opening Balances** dropdown list

Items - Opening Balances

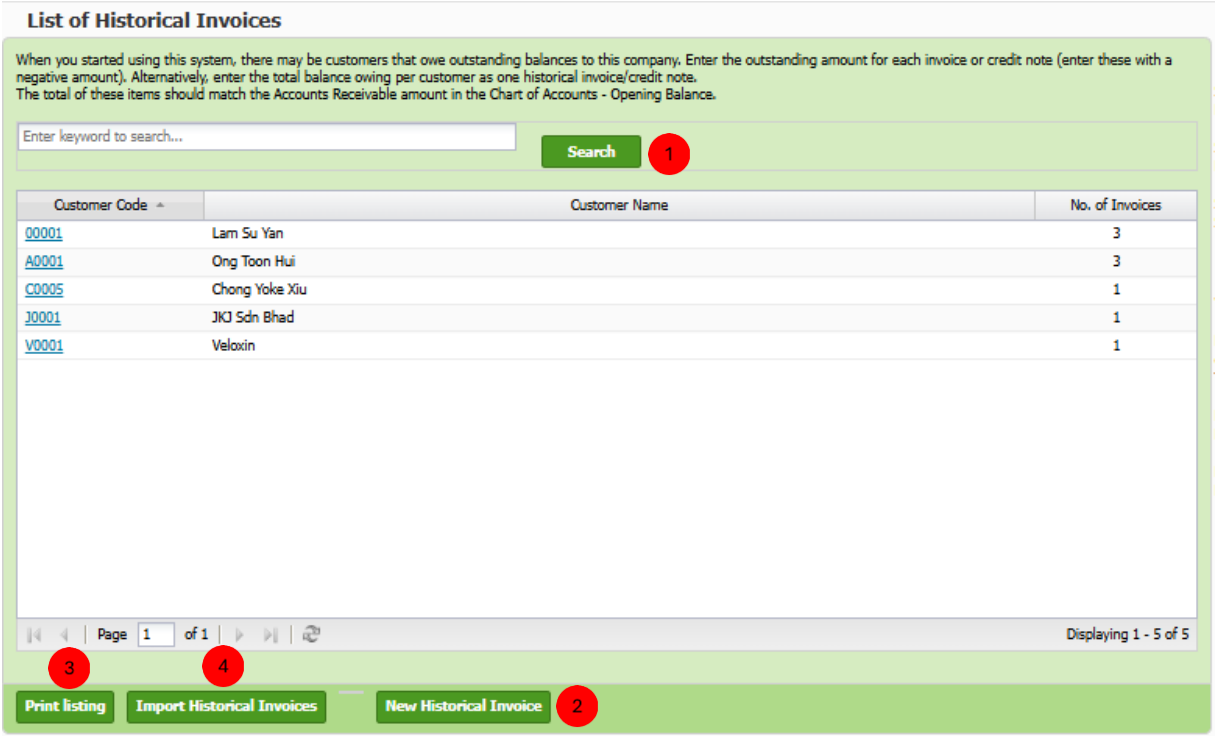


Step 4: Preparing Historical Invoices and Cheques

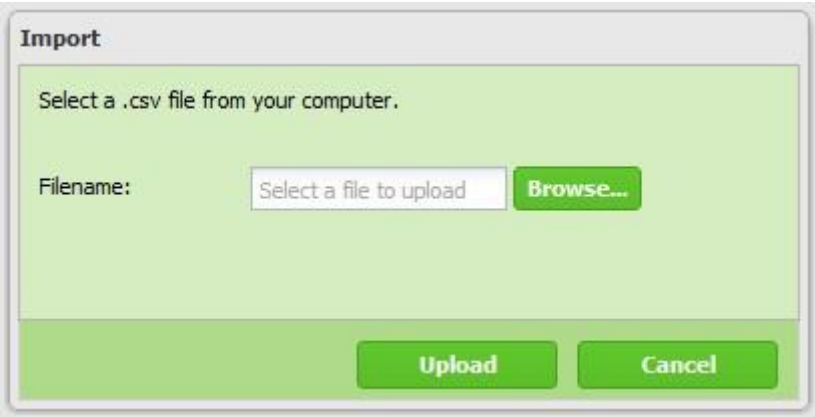
Historical Invoices

You might have outstanding balances due from to your customers when you first started using TreezSoft. These invoices will have to be entered in this section and the total must match with your Account Receivable (Debtor Control Account) amount in your Chart of Accounts – Opening Balance. The unpaid customer invoices is viewable in the list of payments received screen.

List of Historical Invoices



1. Enter your criteria to **Search**.
2. Click **New Historical Invoice** to record a historical invoice.
3. **Print listing** allows you to print multiple invoices. Invoices are printed in PDF formats where you can send via email or send to your printer.
4. **Import** your list of historical customer invoices by using our template.



You will see this screen after you click on the import button.

1. To import your data, click on **Browse** to select the .csv file which you have edited.
   (Please ensure the exact file is selected otherwise error message will be prompt.)

2. Click on **Upload** to proceed

Preparing the Historical Invoices import file

a) Download the blank formatted CSV from http://www.treezsoft.com/sample-import/download.php?file=Historical%20Customer%20invoices.csv

b) Edit the CSV using Excel

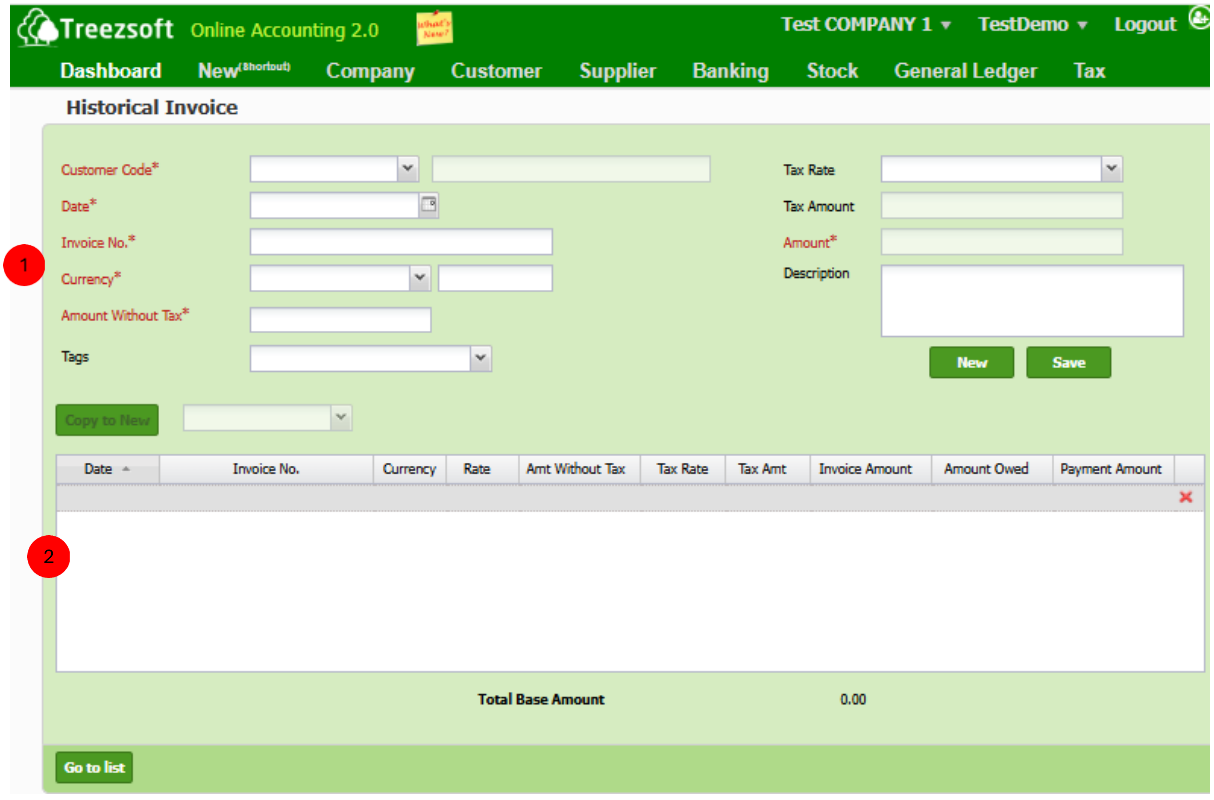
c) Refer to the table below on the columns and restrictions when filling the data

Note: Date format must follow as: YYYYMMDD

Column	Description	Size	Mandatory
Customer Code	The customer code	35	Yes
Date	The historical customer invoice date		Yes
Invoice No.	The historical customer invoice number	255	Yes
Currency	The currency in use		

Rate	Currency rate in use when you created the customer invoice. Based currency is always 1.00		Yes
Amount Without Tax	The amount without tax		Yes
Tax Rate	The tax rate		optional
Tax Amount	The amount of tax		optional
Amount	The total amount		Yes

Creating or Editing a Historical Invoice



1 Historical invoices screen is split into two sections:

This upper section allows you enter your customer's details in your historical invoice. The fields mark with asterisk (*) are required fields.
To create new historical invoice, click on **New** after you have **save**d it.

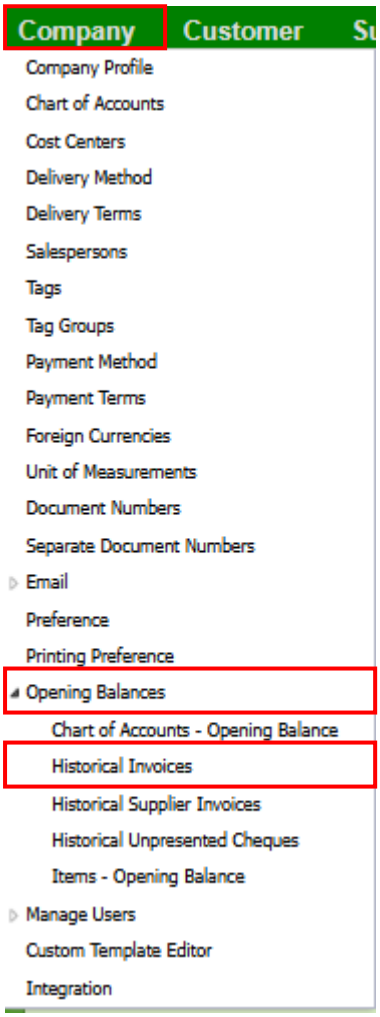
2 Click on a row to view the historical invoice, or the red cross to delete the invoice.

NOTE: when a historical invoice is paid, you cannot delete nor modify the invoice. To edit it, you will need to delete or undo the payment received first.

3 Click go to list to navigate back to Historical Supplier Invoices list

WHERE TO FIND Historical Invoice?

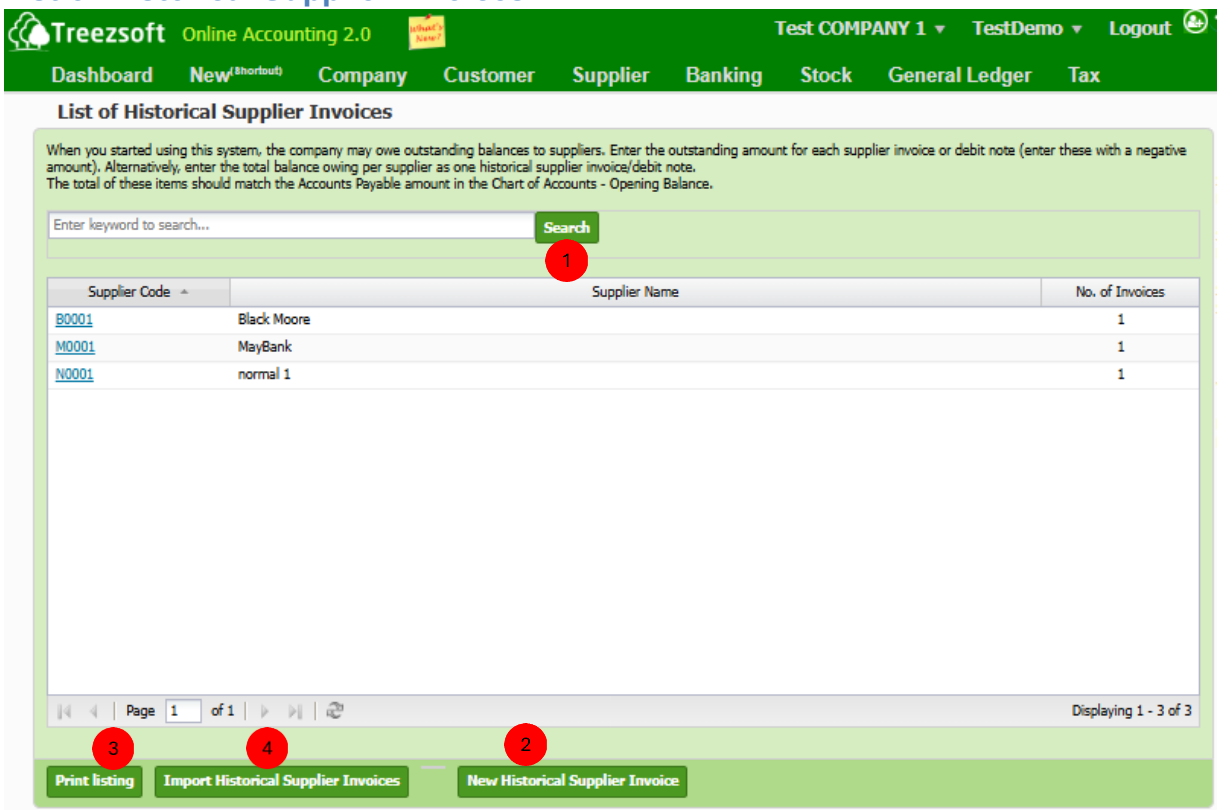
Under **Company** module, under **Opening Balances** dropdown list



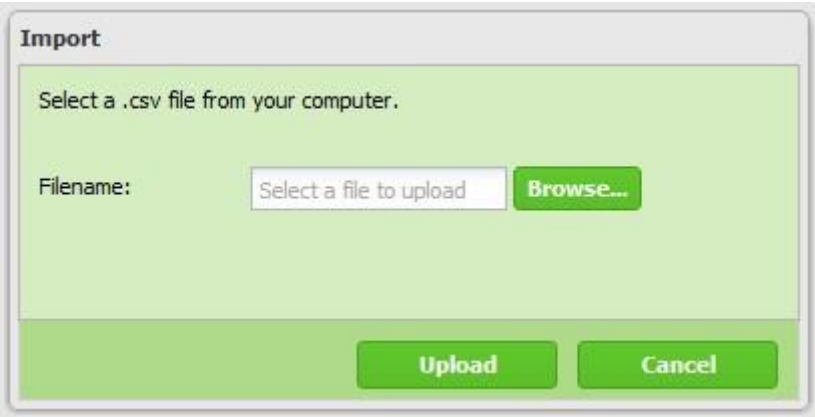
Historical Supplier Invoices

You might have outstanding balances owed to your suppliers when you first started using TreezSoft. These invoices will have to be entered in this section and the total must match with your Account Payable (Creditor Control Account) amount in your Chart of Accounts – Opening Balance. The unpaid supplier invoices are viewable in the list of payments made screen.

List of Historical Supplier Invoices



1. Enter your criteria to **Search**.
2. Click **New Historical Supplier Invoice** to record a historical supplier invoice.
3. **Print listing** allows you to print multiple invoices. Invoices are printed in PDF formats where you can send via email or send to your printer.
4. You can **import** your list of historical supplier invoices by using our template.



You will see this screen after you click on the import button.

1. To import your data, click on **Browse** to select the .csv file which you have edited.
   (Please ensure the exact file is selected otherwise error message will be prompt.)

2. Click on **Upload** to proceed

Preparing the Historical Supplier Invoices import file

a) Download the blank formatted CSV from
http://www.treezsoft.com/sample-import/download.php?file=Historical%20Supplier%20invoices.csv

b) Edit the CSV using Excel

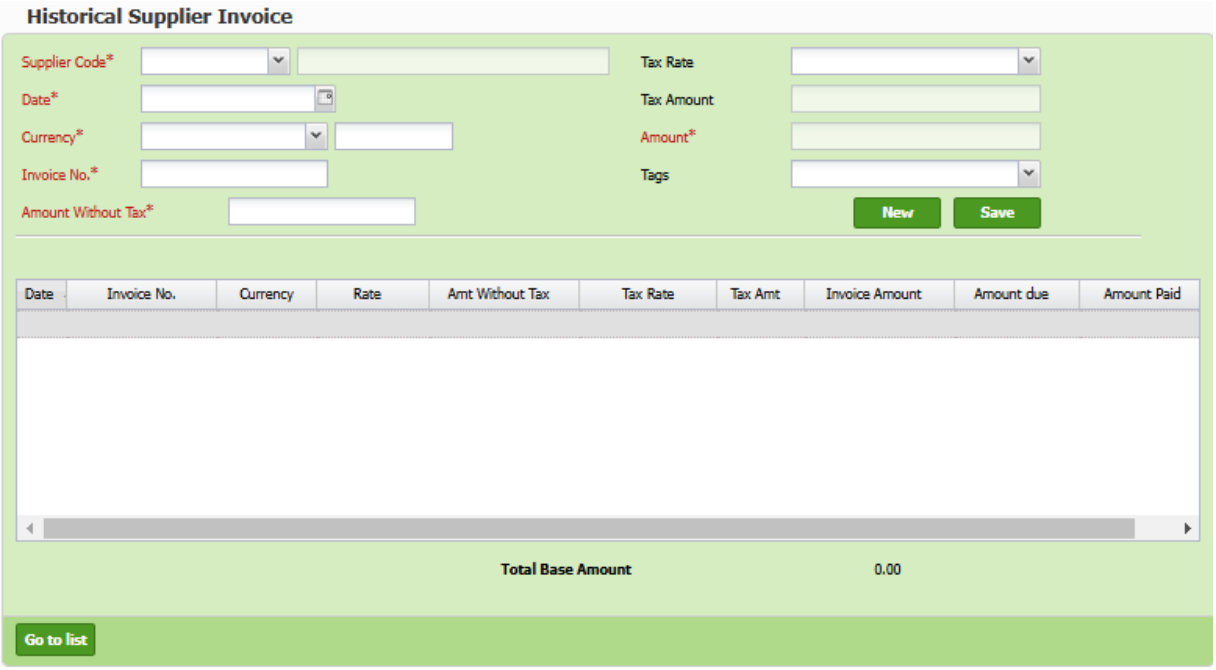
c) Refer to the table below on the columns and restrictions when filling the data

Note: Date format must follow as: YYYYMMDD

Column	Description	Size	Mandatory
Supplier Code	The supplier code	35	Yes
Invoice Date	The historical supplier invoice date		Yes
Invoice No.	The historical supplier invoice number	255	Yes
Currency	The currency in use		Yes

Rate	Currency rate in use when you received the supplier invoice. Based currency is always 1.00		Yes
Amount	The total amount		Yes

Creating or Editing a Historical Supplier Invoice



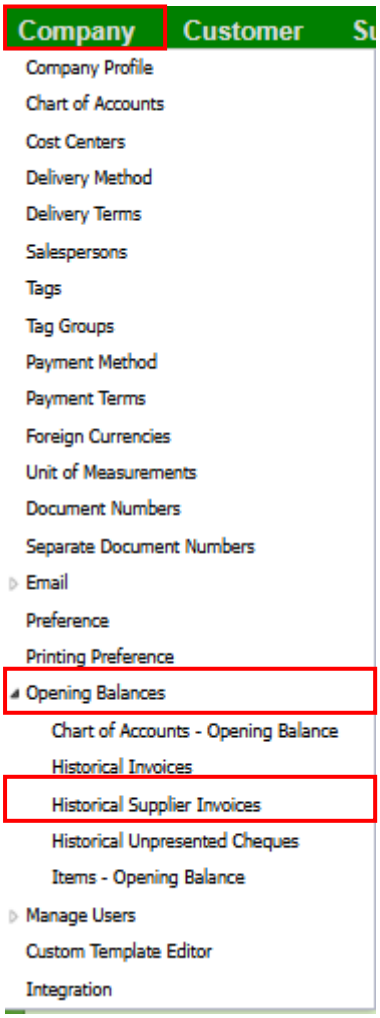
1. Historical invoices screen is split into two sections:
2. This upper section allows you to enter your customer's details in your historical invoice.
3. To create new historical supplier invoice, click on **New** after you have **saved** it.

   Note: when a historical supplier invoice is paid, you cannot delete nor modify the invoice. To edit it, you will need to delete or undo the payment made first.

WHERE TO FIND Historical Supplier Invoice?

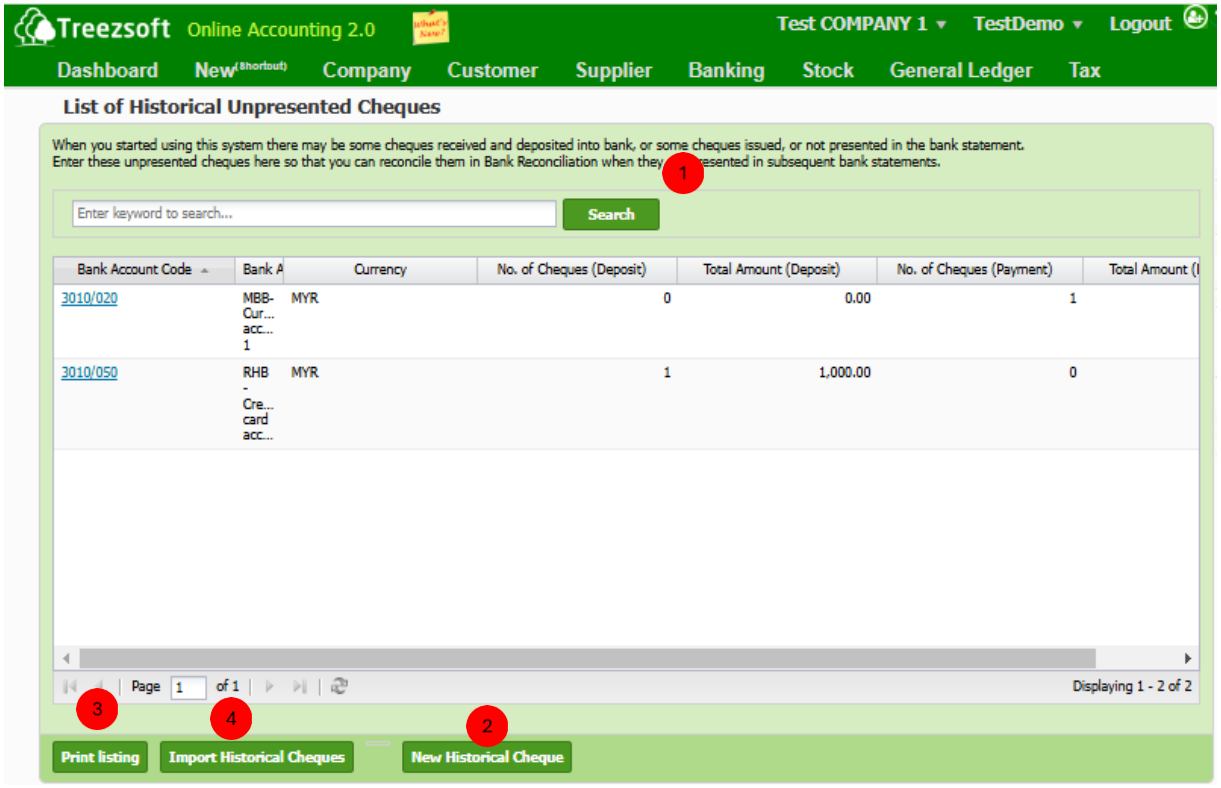
Under **Company** module, under **Opening Balances** dropdown list

Historical Supplier Invoices

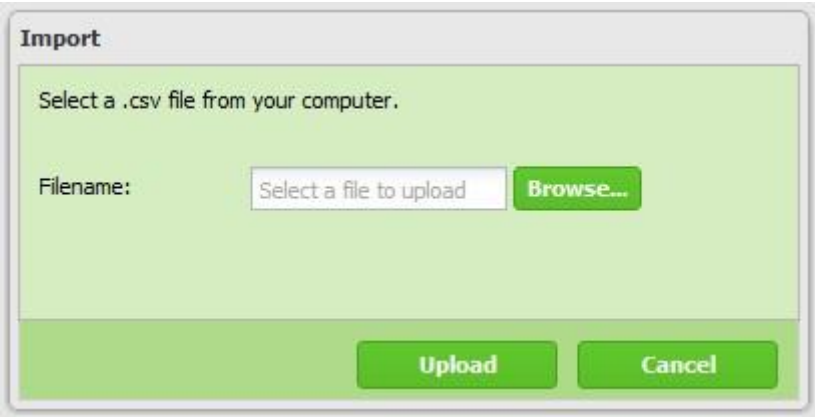


List of Historical Unpresented Cheques

When you started using this system there may be some cheques received and deposited into bank, or some cheques issued, or not presented in the bank statement. Enter these unpresented cheques here so that you can reconcile them in Bank Reconciliation when they are presented in subsequent bank statements.



1. Enter your criteria to **Search**.
2. Click **New Historical Cheque** to record a historical cheque.
3. **Print listing** allows you to print multiple invoices. Invoices are printed in PDF formats where you can send via email or send to your printer.
4. You can **import** your list of historical cheques by using our template



You will see this screen after you click on the import button.

1. To import your data, click on **Browse** to select the .csv file which you have edited.
   (Please ensure the exact file is selected otherwise error message will be prompt.)

2. Click on **Upload** to proceed.

Preparing the Historical Unpresented Cheques import file

a) Download the blank formatted CSV from http://www.treezsoft.com/sample-import/download.php?file=Historical%20Unpresented%20cheques.csv

b) Edit the CSV using Excel

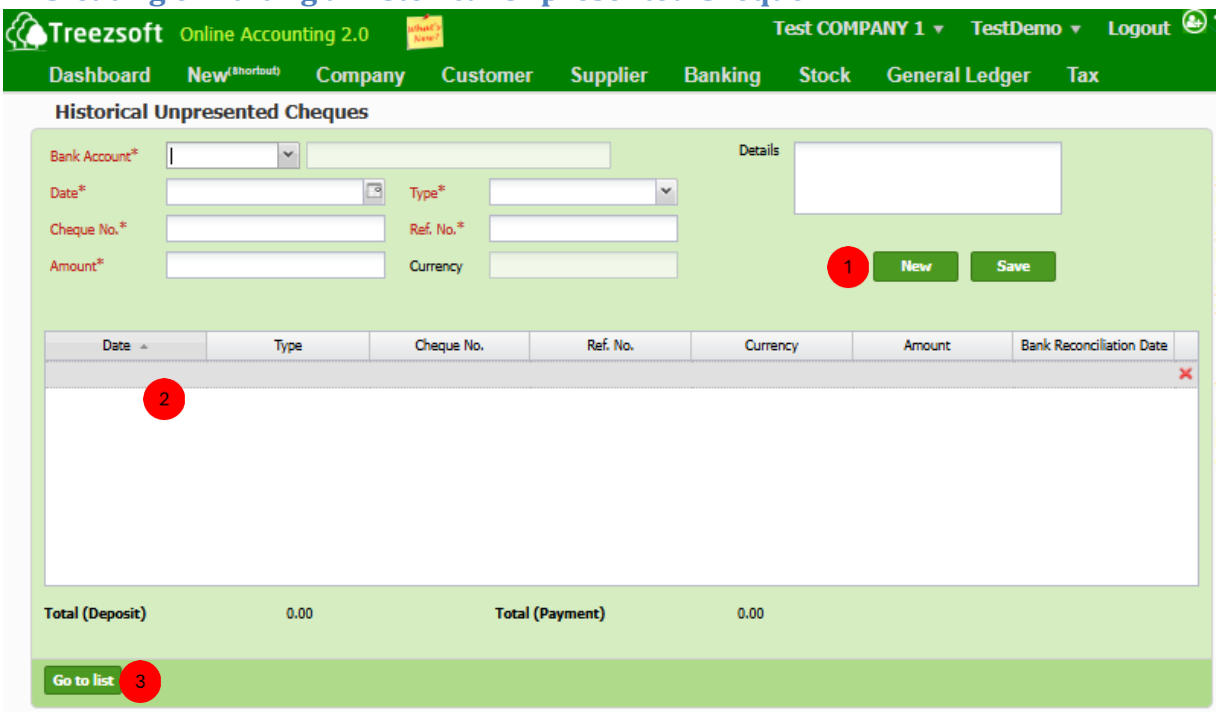
c) Refer to the table below on the columns and restrictions when filling the data

Note: Date format must follow as: YYYYMMDD

Column	Description	Size	Mandatory
Account Code	The account code	35	Yes
Type	Transaction type : Deposit / Payment		Yes
Date	The historical unpresented cheque date		Yes
Cheque No.	The cheque's number	255	Yes
Ref. No.	The cheque's reference number	255	optional

Details	The cheque's details	255	optional
Amount	The cheque's amount		Yes

Creating or Editing a Historical Unpresented Cheque



1. To create another historical unpresented cheque, click on **New** after you have **save**d it.

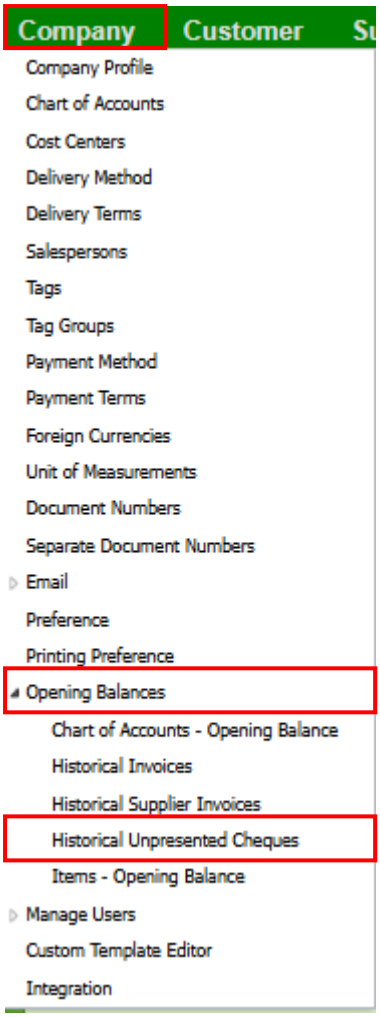
2. Once you save your cheque details, the record will be shown in this section. You are only able to see the reconciliation date after you have done it.

3. Click on **Go to list** and restart the steps if you wished to create new historical cheques with another different bank account.

WHERE TO FIND Historical Unpresented Cheques?

Under **Company** module, under **Opening Balances** dropdown list

Historical Unpresented Cheques



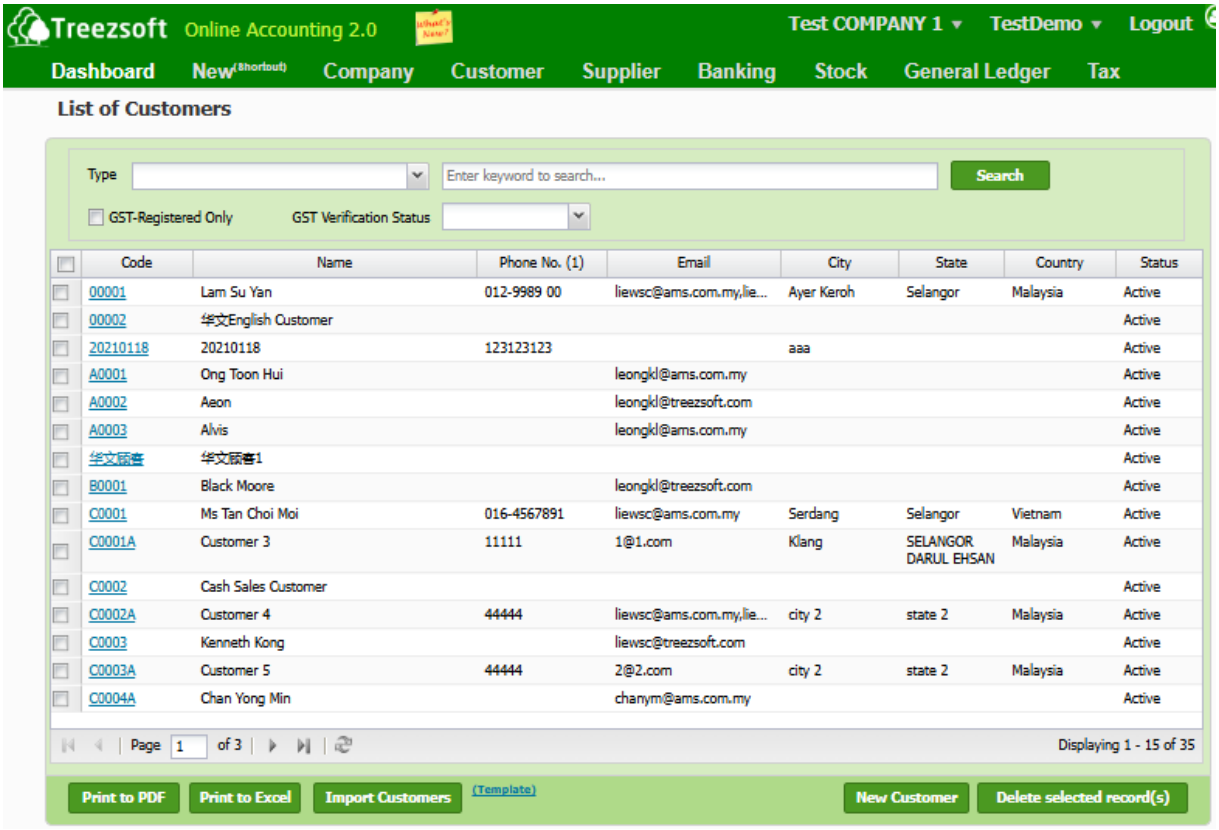
Step 6: Preparing Customers and Suppliers Information

You are done ready to perform for the final step, to create the list of customers and suppliers information. The steps are easy and similar to the previous actions.

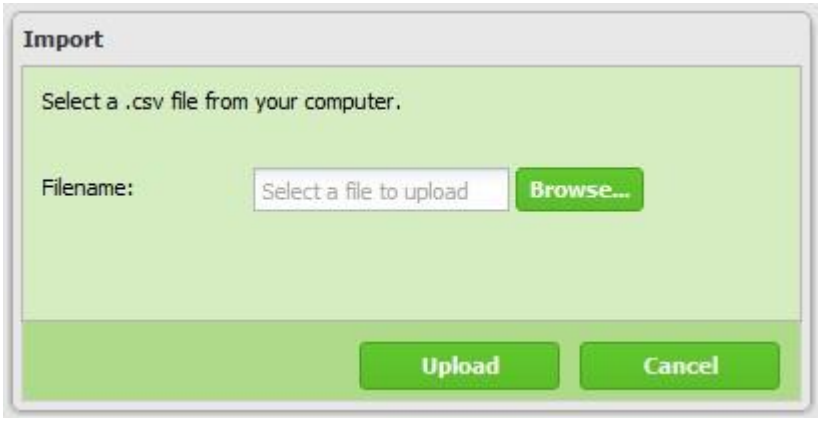
1. Managing Customers Information

List of Customers

This screen will show you all the current customers exist in the system (If you have any).



1. To search for a specific customer, enter a keyword to **search**.
2. Click on **New Customer** button to create new client information.
3. **Print listing** allows you to print the customer list.
4. You can also **import** your list of customers by using our template



You will see this screen after you click on the import button.

1. To import your data, click on **Browse** to select the .csv file which you have edited. (Please ensure the exact file is selected otherwise error message will be prompt.)

2. Click on **Upload** to proceed.

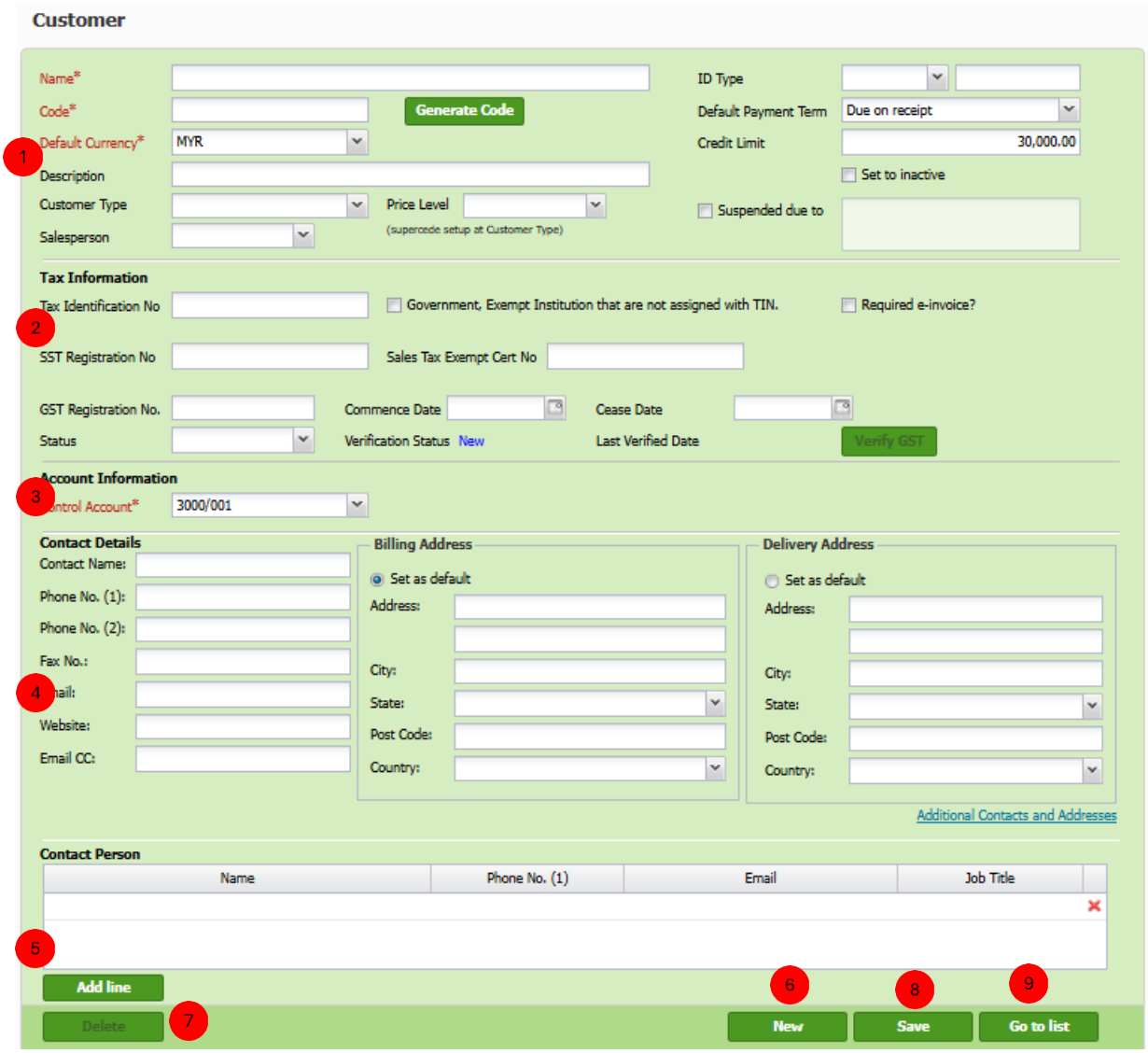
Preparing the Customers import file

a) Download the blank formatted CSV
b) Edit the CSV using Excel
c) Refer to the table below on the columns and restrictions when filling the data

Column	Description	Size	Mandatory
Code	The customer code	35	Yes
Name	The customer name	255	Yes
Control Account Code	The customer control account code	35	Yes
Term	The payment term for customer	35	optional
Credit Limit	The credit limit for customer		optional
Currency	The currency use for transaction		Yes
Description	Remark for the customer	255	optional
Phone 1	Phone 1	30	optional
Phone 2	Phone 2	30	optional
Fax	Fax	30	optional
Email	Email address		optional
Email CC	An additional email address to copy on communications.	30	Optional
Salesperson Code	A unique code or identifier for the salesperson responsible for this customer.	30	
Website	Website		optional
Address 1	Address 1	255	optional
Address 2	Address 2	255	optional
City	City	255	optional
State	State	255	optional

Post Code	Post Code	100	optional
Country	Country		optional
Contact Name	Customer contact name	255	optional
Customer Type	Define customer type		optional
Membership Type:	the type of membership the customer holds, if applicable.		optional
Membership No:	A unique number assigned to the customer's membership.		optional
Joining Date:	The date the customer joined or registered with the business.		optional
Expiry Date:	The date when the customer's membership or service agreement ends.		optional
Birthday:	The customer's date of birth.		optional

Creating or Editing a Customer's details



1 Enter your customer's details in this section. Fields marks with asterisk (*) are required fields.
If you want to deactivate a customer's status, mark the Set to inactive box. If you want to suspend a customer's status, mark the Suspended due to box.

2 This section is for managing and tracking the customer's tax-related details. If the customer is a government or exempt institution that does not have a TIN, you can indicate this by selecting the checkbox provided. You can also specify whether the customer requires e-invoicing by checking the "Required e-Invoice" box.
For GST-related fields, the system allows you to enter the commencement and cessation dates, track the current status, and verify the GST

Registration Number with official records. Upon verification, the status will update to "Verified," along with the date of the last verification.

3. Account information is very important. Make sure you have selected a control account correctly. Make sure you customer's control account is always 3000/000 (Debtors Control Account) by default. You can change the account default in Preference.

4. Enter the contact details in this section. There are two types of addresses you can enter:
Billing Address and Delivery Address. You can set either one of them to be the default address.

5. You can add or assign a contact person specifically to the customer. Add line if there is more than one contact person.

6. Save the record.

7. Click New to create new customer

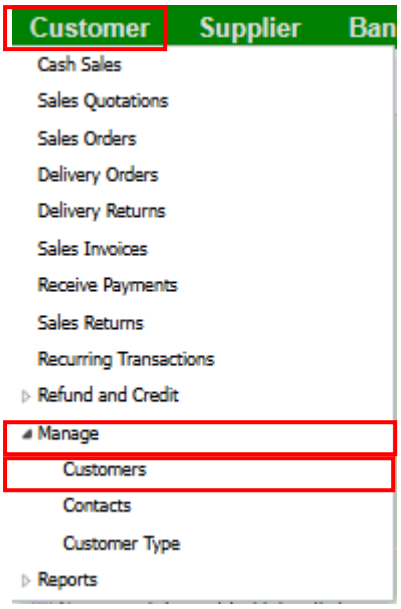
8. Click Delete to delete the customer

9. Click Go to list to navigate back to customer list

WHERE TO FIND Customers?

Under **Customer** module, under **Manage** dropdown list

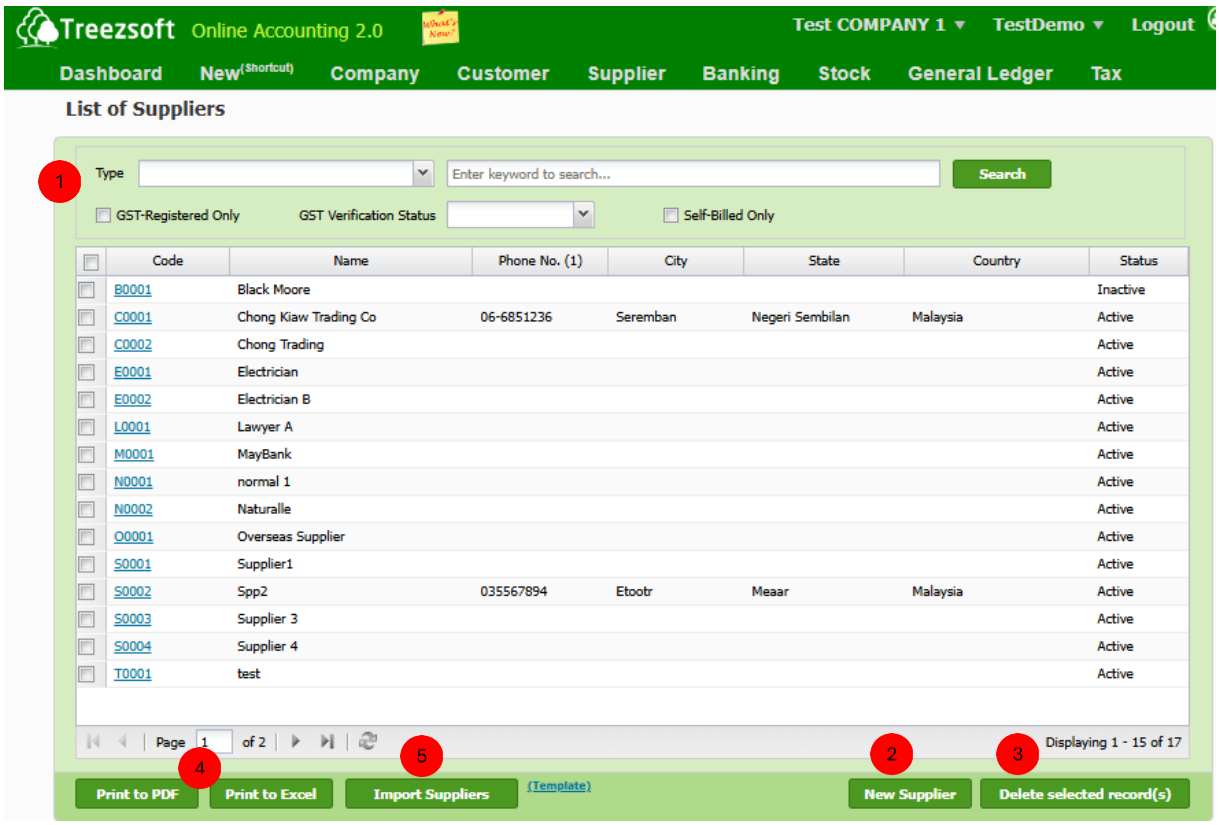
Customers



2. Managing Suppliers Information

List of Suppliers

This screen will show you all the current suppliers exist in the system (If you have any).



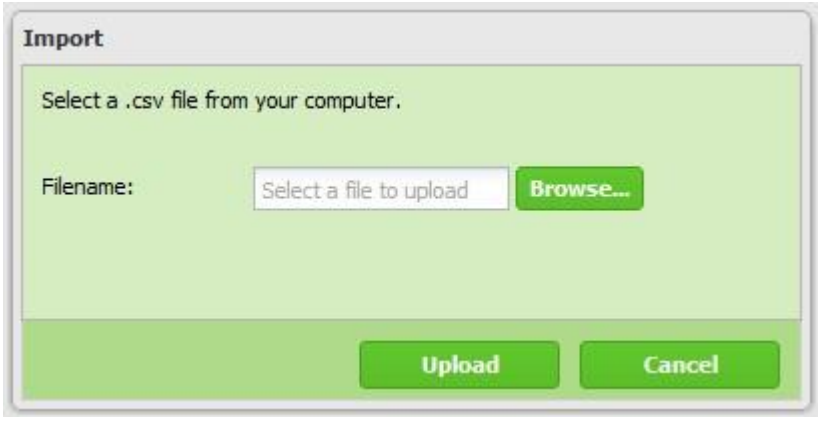
1. Enter a keyword to **Search** for a particular supplier. Or click on the hyperlinked **code** to view details

2. Click **New Supplier** to create new supplier and his details.

3. Click **Delete selected record(s)** to delete a selected record.

4. Click Print to PDF or Print to Excel to print list of suppliers in PDF or Excel format

5. You can **Import Suppliers**, based on a formatted template provide by TreezSoft.



You will see this screen after you click on the import button.

1. To import your data, click on **Browse** to select the .csv file which you have edited. (Please ensure the exact file is selected otherwise error message will be prompt.)

2. Click on **Upload** to proceed.

Preparing the Suppliers import file

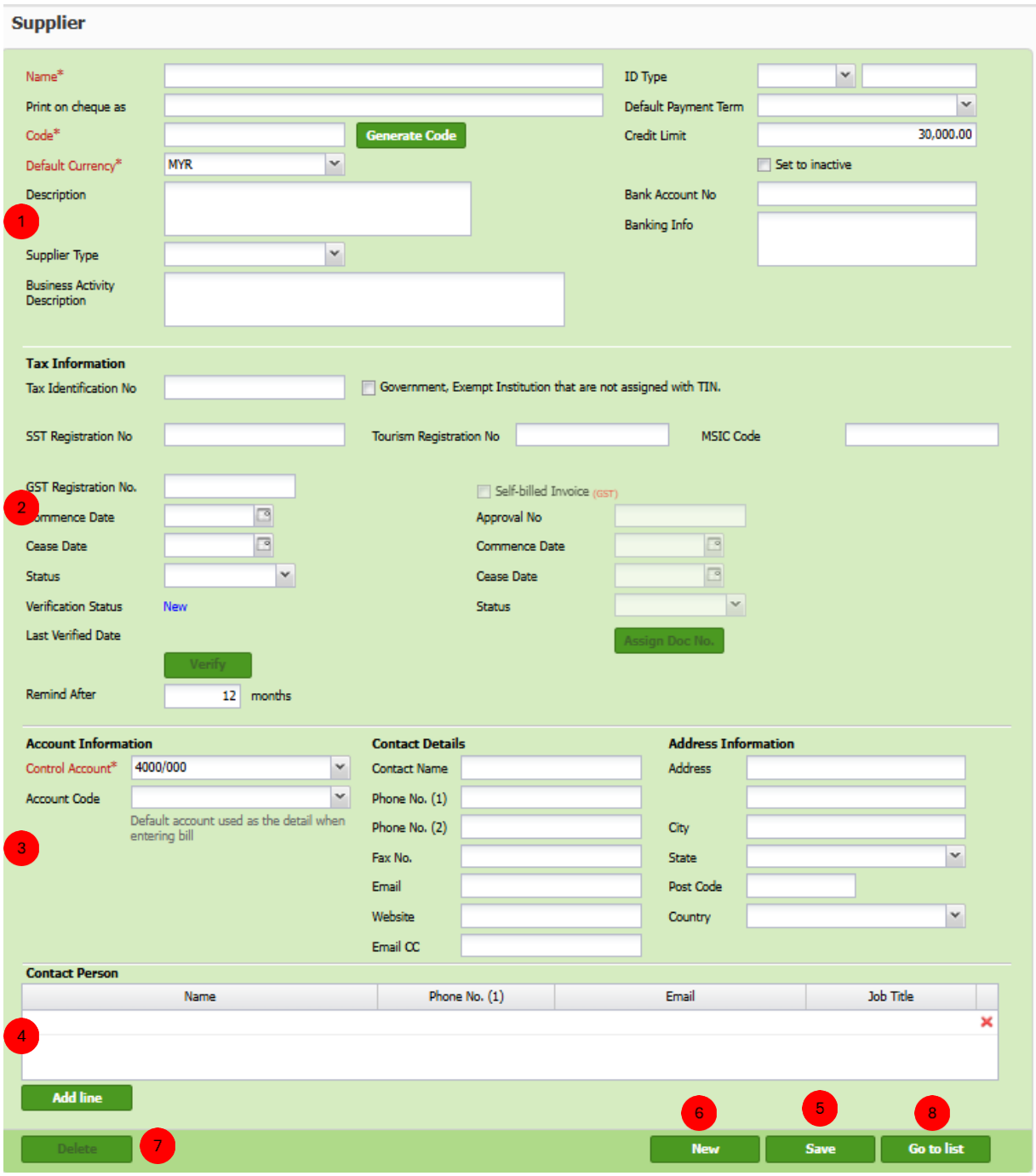
a) Download the blank formatted CSV
b) Edit the CSV using Excel
c) Refer to the table below on the columns and restrictions when filling the data

Column	Description	Size	Mandatory
Code	The supplier code	35	Yes
Name	The supplier name	255	Yes
Control Account Code	The supplier control account code	35	Yes
Term	The payment term for supplier	35	optional
Credit Limit	The credit limit given by the supplier		optional
Currency	The currency use for transaction		Yes

Description	Remark for the supplier	255	optional
Phone 1	Phone 1	30	optional
Phone 2	Phone 2	30	optional
Fax	Fax	30	optional
Email	Email address		optional
Website	Website	255	optional
Address 1	Address 1	255	optional
Address 2	Address 2	255	optional
City	City	255	optional
State	State	255	optional
Post Code	Post Code	100	optional
Country	Country		optional
Contact Name	Customer contact name	255	optional
Supplier Type	Define supplier type		optional
GST Registration No	The supplier's GST registration number for tax purposes.		
GST Commence Date	The date when the supplier's GST registration became active.		
GST Cease Date	The date when the supplier's GST registration was deactivated, if applicable.		
GST Status	The current status of the GST registration (e.g., Active, Ceased).		
ID Type	The type of identification provided by the supplier		

Registration/Identification/Passport	The supplier's identification number based on the ID type.		
Tax Identification No (TIN)	A unique number for tax identification purposes.		
Government or Exempt Institution that are not assigned with TIN	Indicates if the supplier is exempt from TIN registration due to government or institutional status.		
SST Registration No	The supplier’s registration number for Sales and Service Tax.		
MSIC Code	Malaysia Standard Industrial Classification code, representing the supplier’s business industry.		
Tourism Registration No	Registration number if the supplier operates in the tourism industry.		
Bank Account No	The supplier's bank account number for payment transactions.		
Business Activity Description	A detailed description of the supplier’s business activities.		

Creating or Editing a Supplier's details



1. Enter your supplier's details in this section. Fields marks with asterisk (*) are required fields. You can enter a different name in "print on cheque as" field. If you want to deactivate a supplier's status, mark the Set to inactive box.

2. This section is for managing and tracking the suppliers' tax-related details. If the supplier is a government or exempt institution that does not have a TIN, you can indicate this by selecting the checkbox provided.

For GST-related fields, the system allows you to enter the GST Registration Number along with its commencement and cessation dates. You can also track the GST status and verify the entered GST Registration Number with official records by clicking the "Verify" button. Upon successful verification, the status will update to "Verified," along with the date of the last verification. Additionally, you can configure a reminder to reverify the GST Registration after a specified number of months.

Other fields include SST Registration No, Tourism Registration No, and MSIC Code, which cater to specific tax or industry classification requirements. If the supplier is self-billed, you can input the related approval number and its validity period. This section ensures that the supplier's tax compliance information is accurately captured and managed.

3. Account information is very important. Make sure you have selected a control account correctly. Make sure you supplier's control account is always 4000/000 (Creditors Control Account) by default. Make changes if only you have a different or specific account for a particular supplier(s).

4. You can add or assign a contact person specifically to the supplier. Add line if there is more than one contact person.

5. Save the record.

6. Click New to record new supplier's details

7. Click Delete to delete supplier

8. Click Go to list to navigate back to supplier's list

WHERE TO FIND Suppliers?

Under **Supplier** module, under **Manage** dropdown list

Suppliers

