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1. **Registration & Login**
   1. **Registration: -** A user can create its account in the system from a simple web form that will take following inputs

* Email ID *(Will be used as the username.)*
* Password
* Confirm Password

**Registration Process Validations**

* User with existing email ID cannot register again into the system.
  1. **Account Verification: -** An email for account verification will be sent to the registered email ID to confirm the ownership of the email ID. User can only proceed with login once he/she verifies the email ID.
  2. **Login: -** User can log into the system once he/she provides following information correctly
* Email ID *(Entered at the time of registration.)*
* Password
  1. **Password Recovery: -** If a user forgets the password, he/she can reset the password by providing following information
* Email ID *(Entered at the time of registration.)*

If the entered email ID is registered with the system, an email with password reset link will be sent to the user on the registered email ID. User can click on the link and setup new password for the system.

1. **Profile & Settings**
   1. **Profile: -** Profile related information of the user will be recorded here. Profile section will be divided in following sections
      1. **Personal Information: -** Following information will be recorded

* First Name
* Last Name
* Country
* Province/State
* City
* Postal/Zip Code
* Date of Birth
  + 1. **Businesses: -** A registered user can create multiple businesses under his/her account. All accounting entries and reports will be linked to one of the business. Following information will be taken while creating a business
       1. **Basic Information**
  + Company Name
  + Logo
  + Type of Business
    - Artists, Photographers & Creative Types
    - Consultants & Professionals
    - Financial Services
    - General: I make or sell a PRODUCT
    - General: I provide a SERVICE
    - Hair, Spa & Aesthetics
    - Medical, Dental, Health
    - Non-profits, Associations & Groups
    - Real Estate, Construction & Home Improvement
    - Retailers, Resellers & Sales
    - Web, Tech & Media
  + Address Line 1
  + Address Line 2
  + City
  + Country
  + State/Province
  + Postal/Zip Code
  + Phone
  + Fax
  + Mobile
  + Toll Free
  + Website
  + Business Currency *(Should be pre-selected according to country, but use can change)*
  + Type of Organization
    - Sole Proprietorship
    - Partnership
    - Corporation
      1. **Settings**
         1. Taxes on Income: - Various taxes can be recorded for invoices. Following fields will be taken
* Tax
* Type
  + Fixed
  + Percentage
* Applicability
  + Mandatory
  + Optional
    - * 1. Invoicing: - Following settings will be recorded
* Terms & Conditions
  + - * 1. Products & Services: - User can add various products and services with which a business deals. Following fields will be recorded
* Type:- Product / Service
* Title
* Description
* Price
* Can be sold?
  + If yes, then select income account.
* Can be purchased?
  + If yes, then select expense account.
    - * 1. Vendors: - User can manage list of vendors associated with it. Following fields will be recorded
* Vendor Name
* Address
* Country
* State/Province
* City
* Postal / Zip Code
* Phone
* Fax
* Mobile
* Email
* Status: - Active/ Inactive
  + - * 1. **Customers**
* Customer Name
* Address
* Country
* State/Province
* City
* Postal / Zip Code
* Phone
* Fax
* Mobile
* Email
* Status: - Active/ Inactive
  + 1. **Emails: -** A user can add multiple emails against its account and can use any of the email for login purpose. Any of the added email can be used on invoice.
    2. **Password: -** Logged in user can change his/her password by providing following information
* Old Password
* New Password
* Repeat Password
  + 1. **Notification Preference: -** User can set the activities for which he/she wants to get notified. Following checkboxes will be there
* **Income**: - When relevant sales-related activity occurs such as when an invoice is overdue.
* **Expense**: - when relevant purchase-related activity occurs such as when an invoice is overdue.
  1. **Collaboration: -** Variouscollaborationswithuser’s account will be managed from this section
     1. **Sub Users: -** A user can create sub users from this section and manage its access rights. Following information is needed to as a sub user
* Name
* Email ID *(This email ID will be used for login to the system)*

An invitation link will be sent to the user to join user’s account. User can join the account using that link.

**Access Rights**

Following access rights can be managed for a sub user. Rights can be toggled between Full Access/View Only/No Access

* Income
* Expense
* Accounting
* Reports
* Integration
  1. **Settings**
     1. **Subscription & Upgrades**
     2. **Payments**