

**Client's Manual** 

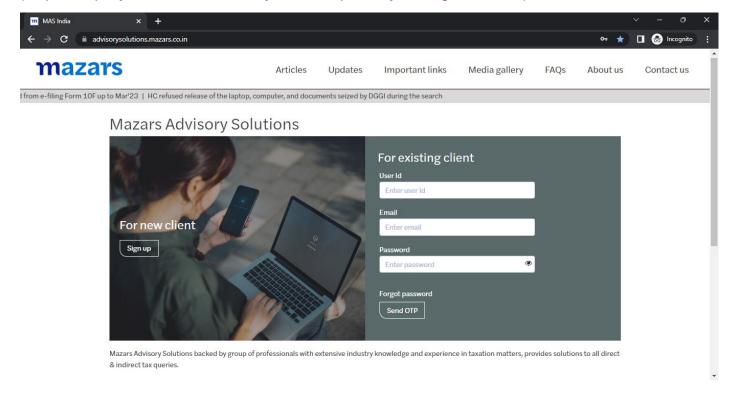
## **Client's Manual**

### **Contents:**

| New Client Registration                       | 03 |
|---|----|
| Existing Client & Secondary Email Users Login | 08 |
| Forgot Password                               | 10 |

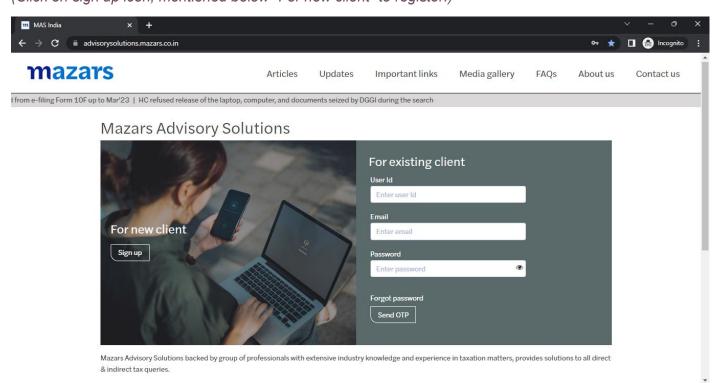
### Visit: https://advisorysolutions.mazars.co.in/

(To post a query, visit Mazars Advisory Solutions portal by clicking above link.)



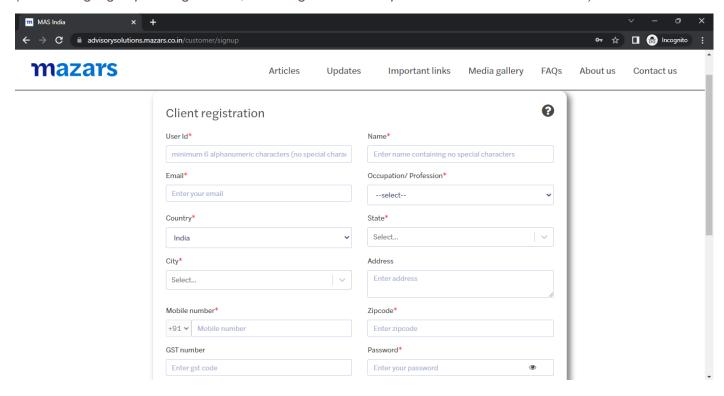
# For New Client: Click on Sign Up

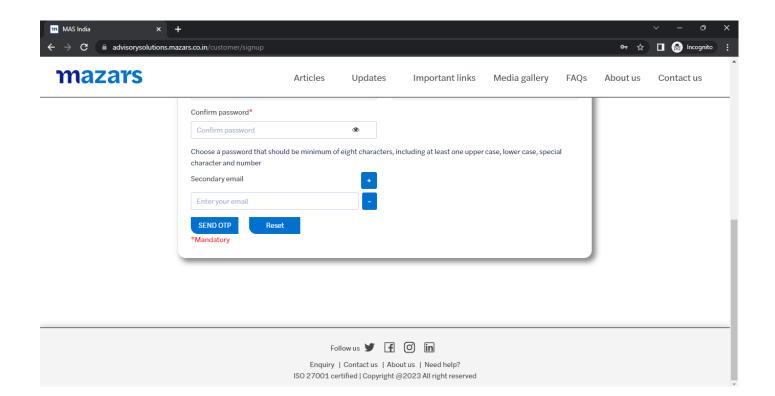
(Click on sign up icon, mentioned below "For new client" to register.)



## Provide your basic information to complete the registration.

(On clicking sign up for registration, following screen will open to enter basic information.)

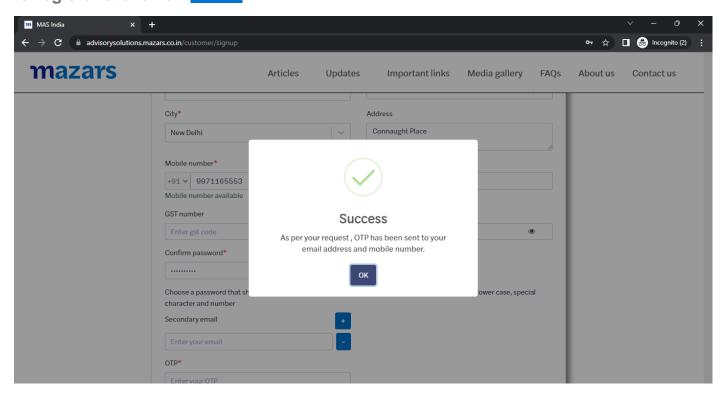




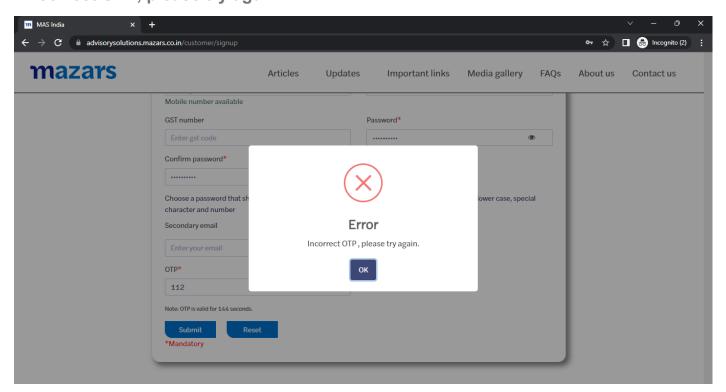
| User Id*   | Enter minimum 6 alpha numeric characters (no special characters) to form a user id  |  |
|--|---|--|
| Name*  | <ul> <li>Enter full name or any chosen name (no special characters allowed)</li> <li>For registration of business/entity, enter the legal name of the business/entity</li> </ul>  |  |
| Email Address*   | Enter personal email address or the email address of any representative or authorized signatory of the business/entity  |  |
| Occupation/Profession*   | <ul> <li>From drop down list, select your occupation/profession</li> <li>In case of business/entity, select the occupation/ profession of the representative or authorized signatory, who is registering for query</li> </ul> |  |
| Country/State/City*  | <ul> <li>From drop down list, select the Country/State/City. City or State<br/>may also be entered/typed.</li> </ul>  |  |
| Address*   | Enter complete address  |  |
| Mobile Number*   | Enter the valid numeric mobile number   |  |
| Zip Code*  | Enter the valid Zip Code or Pin Code  |  |
| GST IN   | Enter the valid 15-digit, PAN based Alpha Numeric GST IN number of the business/entity, if applicable   |  |
| Password*  | <ul> <li>Choose a password that should be minimum of eight characters,<br/>including at least one upper case, lower case, special character<br/>and number.</li> </ul>  |  |
| Secondary Email  | <ul> <li>Enter email address of other person(s) of the organization entitled<br/>to work on the queries under the User Id code.</li> </ul>  |  |
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- ✓ After filling the above information, click on the SEND OTP icon.
   ✓ An OTP will be sent to the above provided email address, valid for 180 seconds.
- ✓ On entering the OTP, click on Submit icon to complete the registration.

After clicking on SEND OTP Success message will appear. Click ok and enter the OTP to register & click on Submit

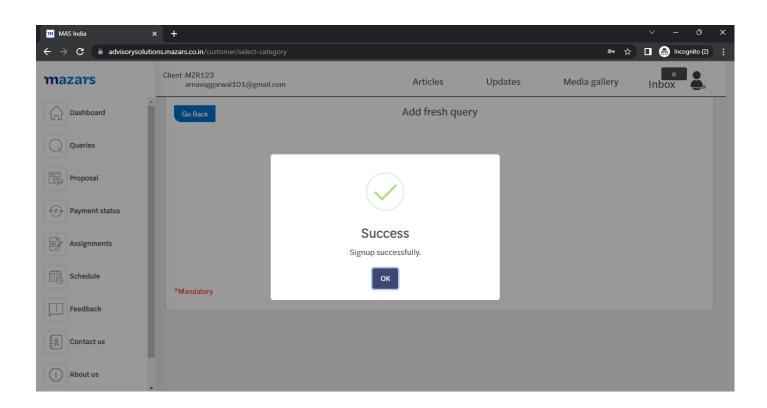


If the OTP entered is incorrect then Error message window will appear showing "Incorrect OTP, please try again"



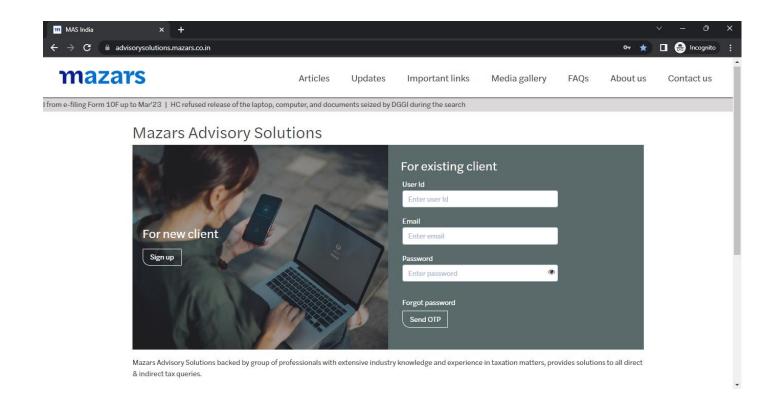
Upon successful registration of a new client, a welcome email will be sent by the Mazars Advisory Solutions team to the client email address and all secondary email users added by the new client.

In these emails, for future log in by such users, the User Id (common to all), specific email id (client email id or the secondary email id) along with unique password will be informed to such client and the secondary email users. With such credentials they will be entitled to log in the platform anytime & independently of each other. All users will have full capability to work on the queries under the common User Id.

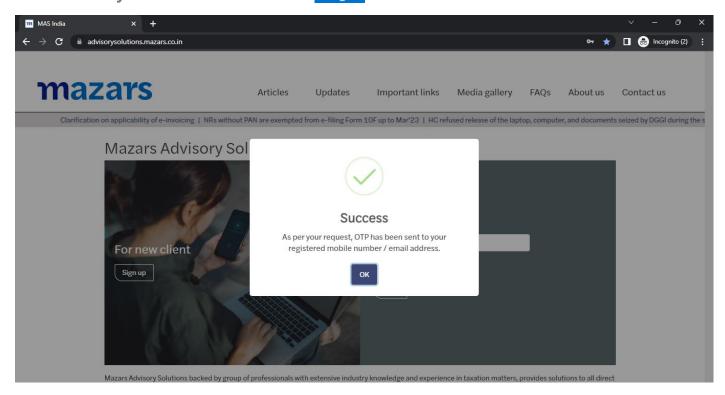


# For Existing Client (including secondary email users): Login with your registered User Id, Email Id & Password.

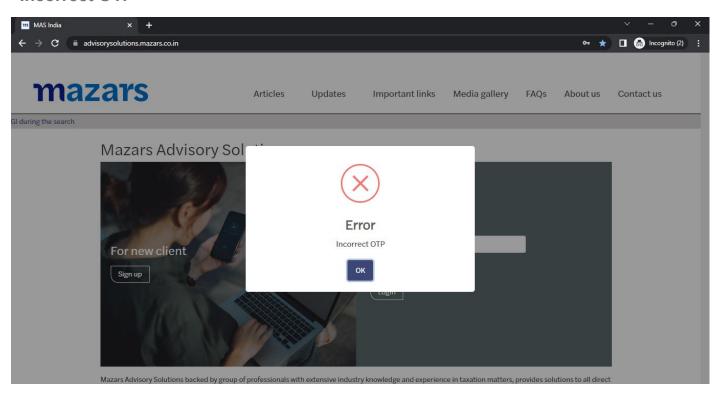
- ✓ Enter your registered user id, email id and password, under "For existing client" and click on SEND OTP
- ✓ The OTP will be sent to your registered email id, valid for 180 Seconds
- ✓ Enter the OTP so received and click on Login
- ✓ Upon login, 'Login successfully' message will be displayed.
- ✓ In case incorrect OTP has been entered, error message window of "Incorrect OTP" will appear.
- ✓ In case the client or any secondary email users of a user id is already logged in, other users of the same user id will not be able to login.



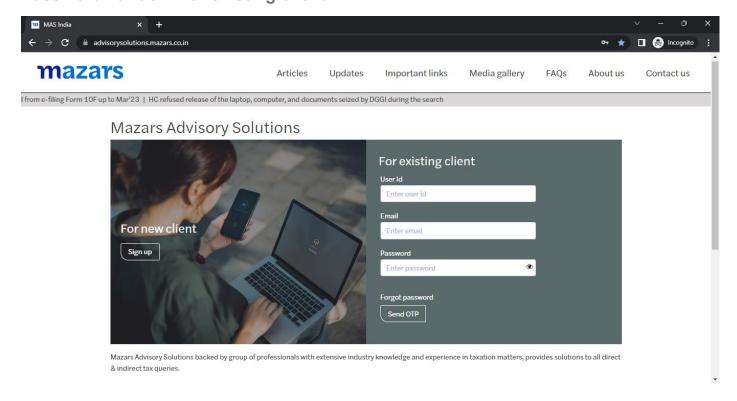
After clicking on SEND OTP Success message will appear. Click ok and enter the OTP received on your email id & click on Login



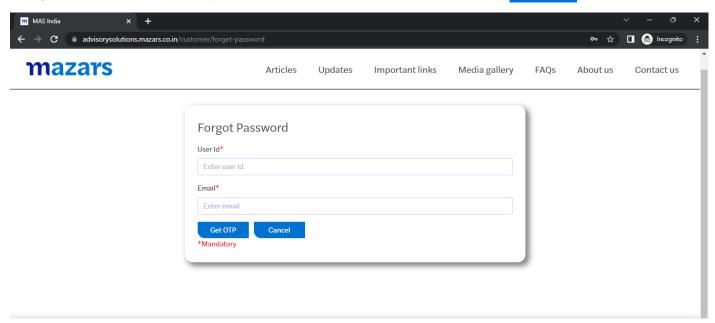
If the OTP entered is incorrect, then Error message window will appear showing "Incorrect OTP"



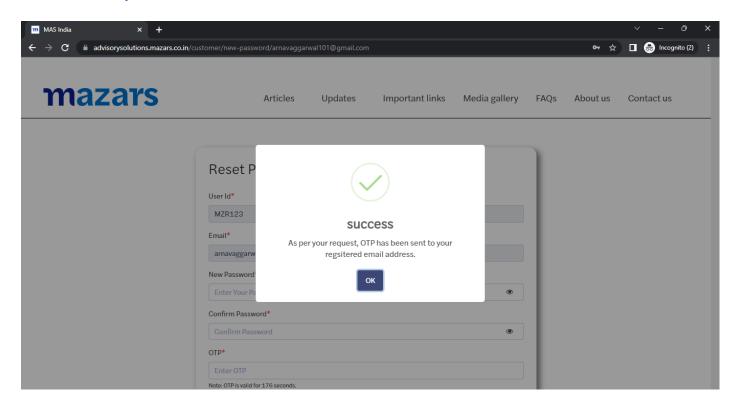
Forgot Password: If the client forgets the Password, then click on "Forgot Password" under "For existing client"



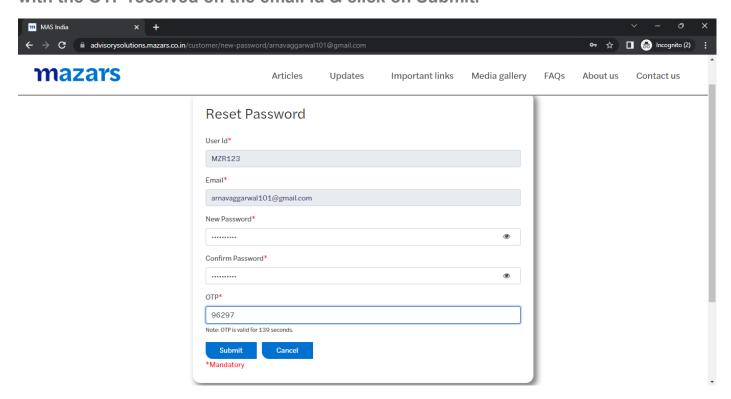
Forgot Password: Enter your user id & email id and click on Get OTP



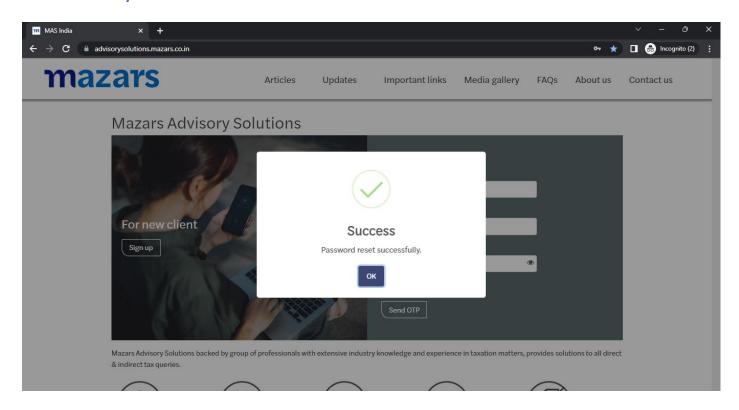
Forgot Password: After clicking on Get OTP, success message window will appear & then click on OK.



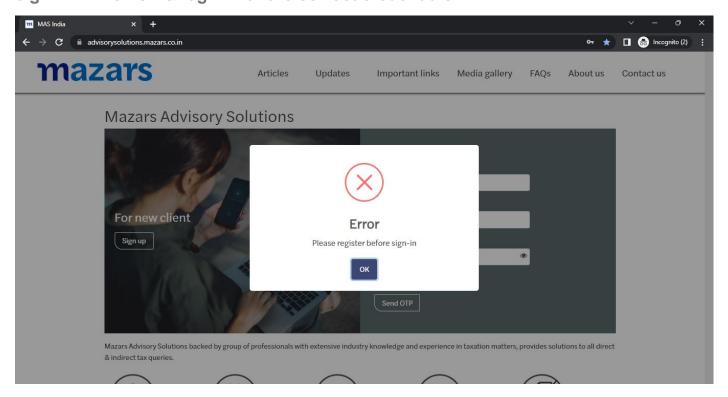
Forgot Password: Enter new password that should be minimum of eight characters, including at least one upper case, lower case, special character and number along with the OTP received on the email id & click on Submit.



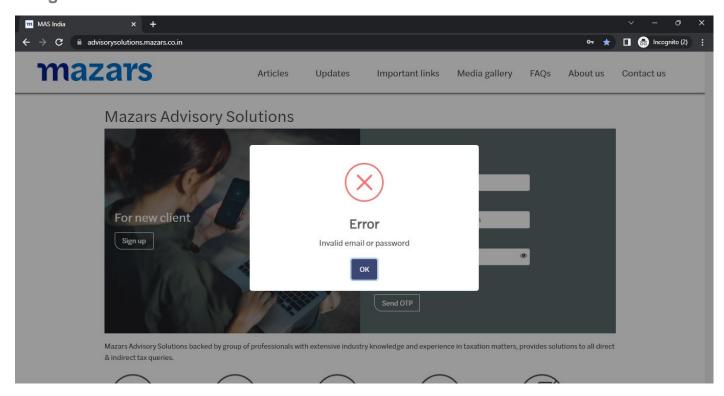
Password Forgot: After clicking on Submit Success message window will appear, showing password reset successfully. Now login with the new password.



Incorrect User Id or Email Id: At the login page, if the user id or email id entered is incorrect then Error message window will appear showing "Please register before sign-in". Click Ok & login with the correct credentials.



Incorrect password: At the login page, if the password entered is incorrect then Error message window will appear showing "Incorrect email or password". Click Ok & login with the correct credentials.



After successful login by an existing client or registration of a new client, Client dashboard screen/ window will open.