

Final updated User manual Create org

Setting Up Your Organization in the Kitaab Application

Introduction (1):

Your journey with Kitaab starts with setting up your organization. In “Create Organisation”, you just need to enter the basic details of your company and you are ready to use Kitaab for your accounting needs

Introduction (2):

Congratulations on successfully signing up for the Kitaab application! Now, let's move forward and set up your organization.

1. Setting Up Your Organization:

Let's get started by filling out all the necessary fields to create your organization.

Remember, the **legal name** is your organization's official registered name, while the **alias** is how you'll identify your organization within the application.

The default input for **County** and **currency** are India and INR, respectively, but you can easily change these as needed.

2. GST Registration (if applicable):

If your organization is registered under the GST regime, go ahead and activate the toggle button to unlock the GST-related form fields.

Note:

When you enter a valid GSTIN, Kitaab will automatically fill in the state and PAN fields for you. If you have multiple GSTINs, you can add them to Kitaab through branches in Organisation settings. The GSTIN you enter here will be set as the default GSTIN.

Saving Your Organization:

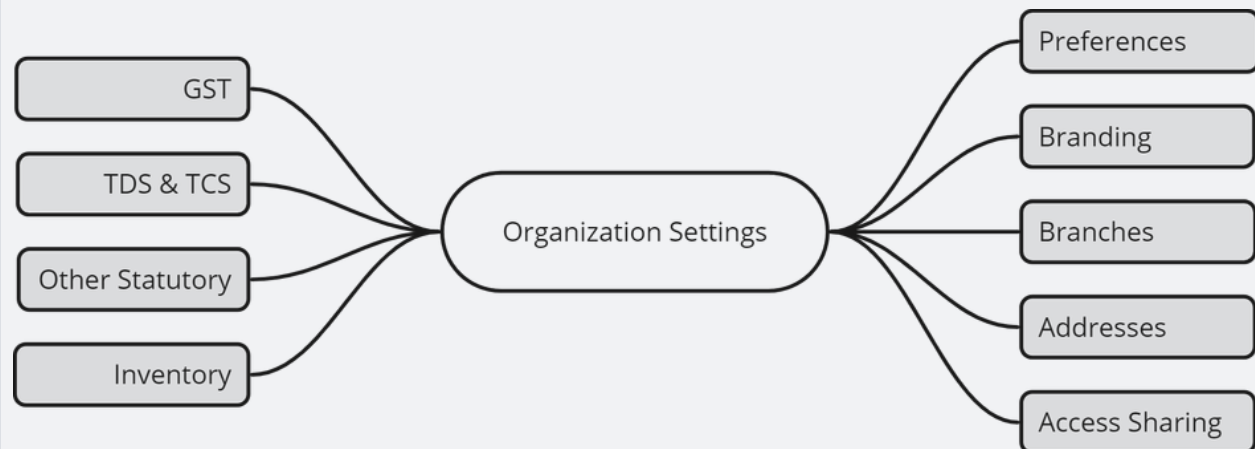
Once you've filled out the form, simply save your organization and you are ready to use Kitaab.

Keep in mind that creating an Organization automatically assigns you as the admin/owner of that Organisation

The screenshot shows the 'Create Organization' form. It has a title bar 'Create Organization' and a 'Logout' link in the top right. The form is divided into two main sections. Section 1, labeled '1', contains fields for 'Legal Name', 'Alias', 'Country' (a dropdown menu with 'India' selected), and 'Currency' (a dropdown menu with 'Indian Rupee' selected). Section 2, labeled '2', contains a 'Registered for GST?' toggle switch (currently turned off), a 'GSTIN' field, a 'State' field, and a 'PAN' field. At the bottom of the form are 'Save' and 'Cancel' buttons.

Next Steps: Organization Settings

Embark on a Journey of Organizational Mastery: Your Blueprint for Success



1. **Preferences:** Tailored for You

- *Customize settings to fit your organization's unique needs and workflows.*
- As you step into your organization's digital realm, the Preferences section becomes your oasis of control. Here, you mould every detail to match your unique style and operational needs. From language preferences to custom workflows, this is where your organizational magic begins.

2. **Inventory:** Optimize Your Resources

- *Streamline inventory management for efficiency and accuracy.*
- Picture a well-oiled machine where every part is in sync. That's what Inventory management offers you—an optimized system to track, manage, and optimize your resources. Whether it's monitoring stock levels or analyzing trends, this section is your key to operational excellence.

3. **GST:** Navigating Financial Waters

- *Set up and manage GST seamlessly for financial clarity.*
- Taxes need not be a maze. With the GST settings, you sail through financial waters with confidence. Set up, manage, and track Goods and Services Tax effortlessly, ensuring your organization stays compliant and financially savvy.

4. **TDS & TCS:** Simplifying Tax Compliance

- *Handle TDS & TCS effortlessly to stay compliant and organized.*
- Taxation is a breeze when you have the right tools. TDS & TCS settings simplify tax compliance, helping you navigate deductions and collections with ease. Stay on top of regulatory requirements while keeping your financial records organized.

5. **Other Statutory:** Mastering Legal Obligations

- *Navigate regulatory requirements with ease and confidence.*
- Compliance is more than a checkbox—it's about staying ahead and informed. The Other Statutory section empowers you to manage legal obligations seamlessly. From regulatory filings to industry-specific requirements, you're equipped to handle it all.

6. **Branding:** Define Your Identity

- *Create a distinctive brand image that resonates with your audience.*
- Your brand is your story, and the Branding settings allow you to tell it beautifully. Define your identity with custom logos, colors, and themes that resonate with your audience. Every pixel reflects your organization's ethos and values.

7. **Addresses:** Connect Seamlessly

- *Keep all contact details updated and easily accessible.*

- Communication starts with accurate information. The Addresses section ensures you stay connected with precision. Update and manage contact details seamlessly, keeping your network strong and reliable.

8. **Branches**: Expand Your Reach

- *Manage branches efficiently to support your organization's growth.*
- Expansion is not just a dream—it's a strategic move. With Branches settings, scale your organization effortlessly. Add, edit, or remove branches as your operations expand, all from one centralized hub.

9. **Access Sharing**: Collaborate with Confidence

- *Control access and permissions for smooth teamwork and communication.*
- Collaboration fuels innovation, and Access Sharing settings foster a culture of teamwork. Control user access and permissions, ensuring smooth collaboration and communication across teams and departments.

IMPORTANT NOTE:

Accessing Your Organizations List

You can view all your organizations in the "My Organizations" section under your profile settings. To view this in detail, [click here](#).