24ETAX ERP · PROCESS GUIDE 19

Portals and mobile app

Covers: Customer and vendor portal, Employee self-service, Mobile app (in preparation)

User guide · 24etax-erp.com · Issued 17 November 2026

Purpose

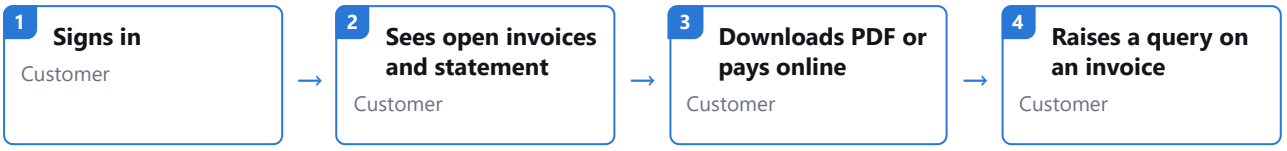
Three ways people outside the accounts team use the system. **Customers and vendors** sign in to a portal that shows only their own account. **Employees** use self-service for payslips, leave and claims. A **phone app** for people on the move is in preparation. This guide is for the people who set these up and answer questions about them.

A. Customer and vendor portal

Give a customer or vendor access

1. Make sure the party exists with the right e-mail (guide 01).
2. Open **Administration** › **Users & access**. Under **Invite a user** enter their e-mail, choose the role **Portal user** and pick their **Party**. Click **Send invitation**.
3. They accept the invitation, set a password and sign in at the same address as you. They land on the portal and cannot reach any other page.

WHAT A CUSTOMER DOES



↳ The portal shows only that party's own documents.

What a customer sees

- **Open invoices** with due date and **Outstanding**; any **Advance / on account**; their **Payment terms**.
- Per invoice: **PDF**, **Pay now** (online payment) and **Query** – they type what is wrong and it reaches the accounts team.
- **Recent documents** and the **Account statement** with debit, credit, balance and **Closing balance**.

What a vendor sees

- **Open purchase orders**, **Your bills** with TDS deducted and payment status, and **Payments to you**.
- **Submit an invoice**: they enter **Invoice no.**, **Invoice date**, **Amount ₹**, **Your PO ref**, attach the PDF or image and click **Upload invoice**. It appears for you in **Purchases** › **Vendor bills** to review and book (guide 05).
- **Requests for quotation**: they open an RFQ and click **Submit quote** with rate, GST %, lead days and validity. Submitting again replaces the earlier quote.

Your follow-up

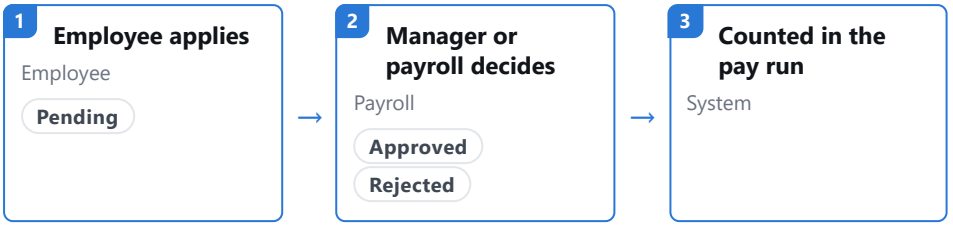
- ☐ Answer invoice queries the same day; correct by credit note where the customer is right.
- ☐ Review vendor uploads daily; book or reject with a reason.
- ☐ When a contact leaves the customer or vendor, make their portal user inactive.

B. Employee self-service

An employee who signs in with the e-mail recorded on their employee record (guide 11) lands on **Employee self-service**.

Tab	What the employee does
Payslips	Views each month's gross, TDS and net pay; downloads the **PDF**.
Leave & attendance	Sees leave balances (opening, used, available). **Apply for leave** with dates and reason; the manager is notified. **Mark myself present today**.
Reimbursements	**New claim**: date, category, amount and what it was for; **Submit**.
Tax declaration	Chooses the regime, enters rent, previous employer income and TDS, and investments; **Submit declaration**. Payroll verifies the proofs.

LEAVE REQUEST



Payroll staff handle the requests in **Payroll & people** › **Attendance & leave** (guide 11).

C. Mobile app (in preparation)

> **NOT AVAILABLE YET**
>
> The app for Android and iPhone is being prepared and is not in the app stores. This section describes what it is being built to do, so you know what to expect. Until it is released, use the application in a browser.

The phone app will sign in with the same e-mail and password and obey the same roles, approvals and audit trail as the website. It is designed to keep working without a connection: what you do is queued and sent when the connection returns.

Screen	Use
Home	Key figures and your work queue. Pull down to refresh. A yellow banner counts changes waiting to sync.
Approve	Vouchers awaiting your approval with their lines, and entries the system proposed. Approve or reject; the decision appears in the audit trail under your name.
Capture	Take a photo of a bill, or pick one from the gallery. The original is stored and an entry is proposed for review (guide 08). A voice note in Hindi, English or a mix can also start an entry.
Me	Your payslips, leave balances and applications, mark attendance.
More	Invoices (create, share the PDF, send a payment link), Expenses (claim with a receipt photo), Payments (payment link or UPI QR for a customer), Banking (decide proposed bank lines), POS (sell at the counter, also offline), Inventory (barcode lookup and stock count), Reports, Settings.

First use

1. Install the app, sign in, and enter the two-factor code if asked.

2. In Settings choose the organisation, allow notifications, and turn on the biometric lock (asked on opening and after five minutes away).
3. If the yellow banner stays after you are back online, open Settings and use Sync now. Queued items can be retried or discarded there.

Lost phone

1. Sign in on the website, open **Profile & security** and sign out everywhere. This removes the phone's access.
2. Change your password. Tell the administrator.

Checks and controls

CHECKS AND CONTROLS

- A portal user is tied to one party and can see nothing else, on screen or through any address.
- Self-service shows an employee only their own records.
- Every action from the phone carries the same permissions and approval rules as the website; an offline action is applied once only, even if sent twice.
- Photos captured as bills are stored unchanged as the original document.

Limits

LIMITS

- **Pay now** and payment links work in test mode until the administrator enables a live payment provider (guide 17).
- The Employee role cannot be invited from Users & access. Self-service opens when a signed-in user's e-mail matches an employee record; ask the administrator to create the sign-in.
- The phone app is not released yet. Camera capture, voice notes and push notifications will need the installed app; they do not work in a phone's web browser.
- Deleting your account is done from the website's privacy page, not from the app.