

Truway Portal - User Guide

Version 1.0

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Introduction

This guide will help to login to the new portal for the first time and get familiarized with the portal itself.

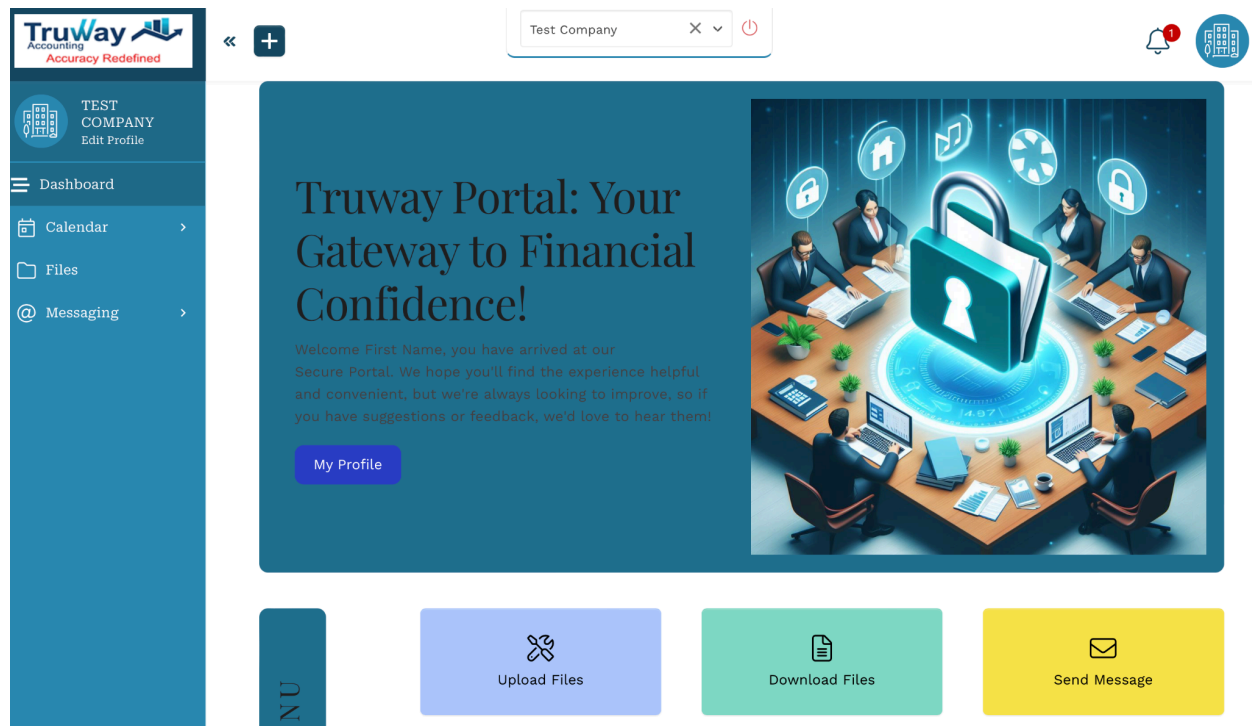
First Time Login

Click on the link from the invite email to setup password and login.

This will lead to the below screen.

This is your company profile. My Profile will have all the details about the company.

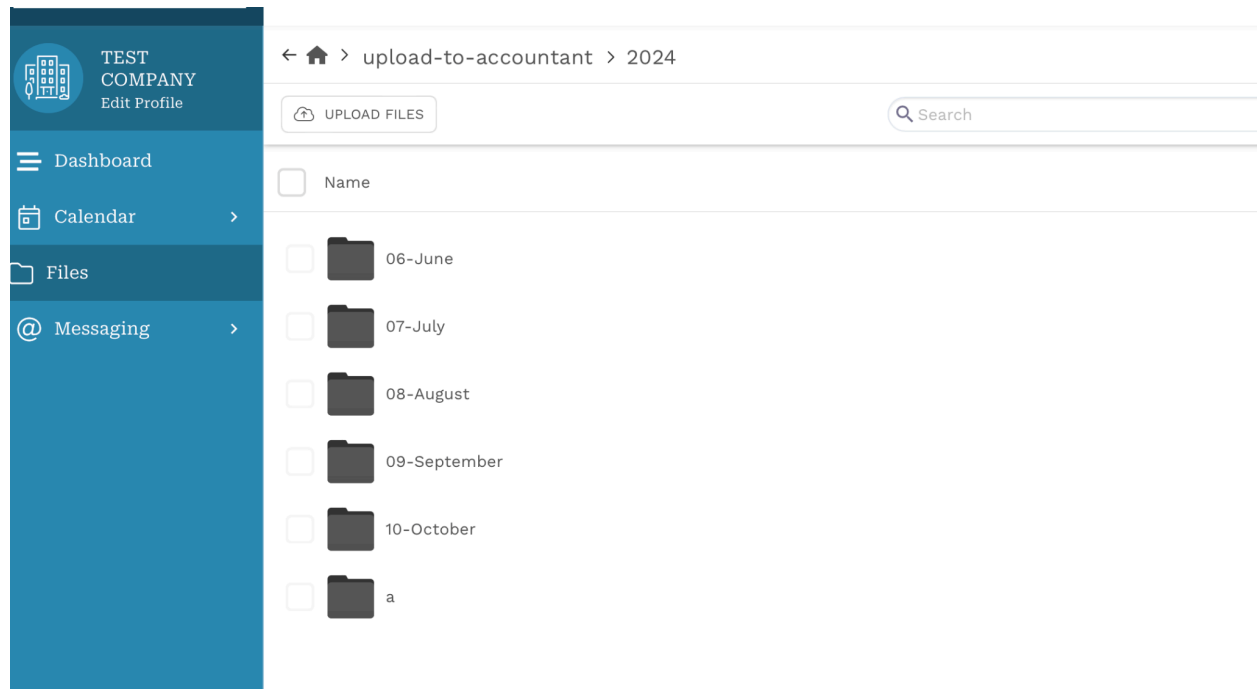
Take a look around the dashboard.



Menus

Upload Files

This allows uploading files to the Accountant.



Download Files

This is an inbound folder from Accountant.

The screenshot shows a web application interface. On the left is a blue sidebar with a logo and navigation menu. The main content area on the right shows a breadcrumb trail and a list of folders.

Sidebar:





- TEST COMPANY
Edit Profile
- Dashboard
- Calendar >
- Files
- @ Messaging >

Main Content Area:

Breadcrumb: < Home > Files from Accountant > 2024

Search:

Table:

<input type="checkbox"/>	Name
<input type="checkbox"/>	 Financial Document
<input type="checkbox"/>	 Other Documents
<input type="checkbox"/>	 Payroll
<input type="checkbox"/>	 Revenue Document

Send Message

This is for secure messaging with the Accountant Team

The screenshot shows a web application interface for sending messages. On the left is a blue sidebar with a logo and navigation links: Dashboard, Calendar, Files, and Messaging. The top header is dark blue with 'TEST COMPANY' and 'Edit Profile'. The main content area is white and titled 'Create New Message'. It features a 'Messaging' sidebar with 'Inbox', 'Sent Box', and 'Trash'. The main form has fields for 'TO *', 'CC', 'SUBJECT *', and 'MESSAGE *'. The 'TO' and 'CC' fields have a 'Make a selection' dropdown. The 'MESSAGE' field has a rich text editor toolbar with icons for bold, italic, underline, link, and others. At the bottom are 'Send' and 'Cancel' buttons, and an 'Attach Files' button.

TEST COMPANY
Edit Profile

Dashboard
Calendar
Files
Messaging

Messaging
New Message

Inbox
Sent Box
Trash

Create New Message

TO *
Make a selection

CC
Make a selection

SUBJECT *

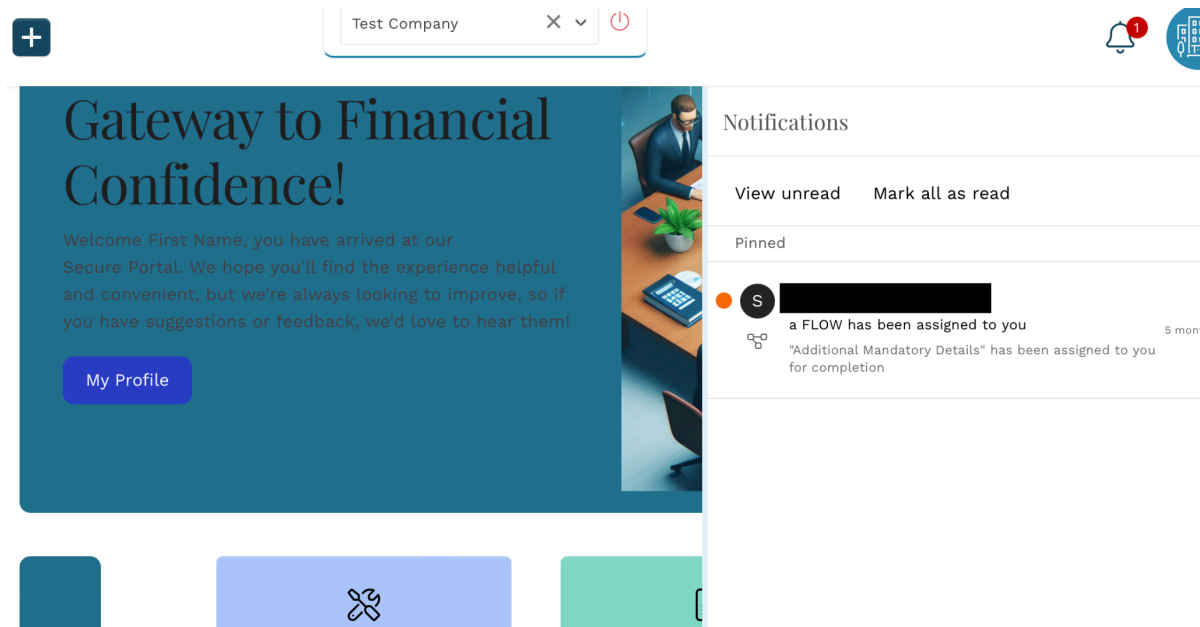
MESSAGE *

Attach Files

Send Cancel

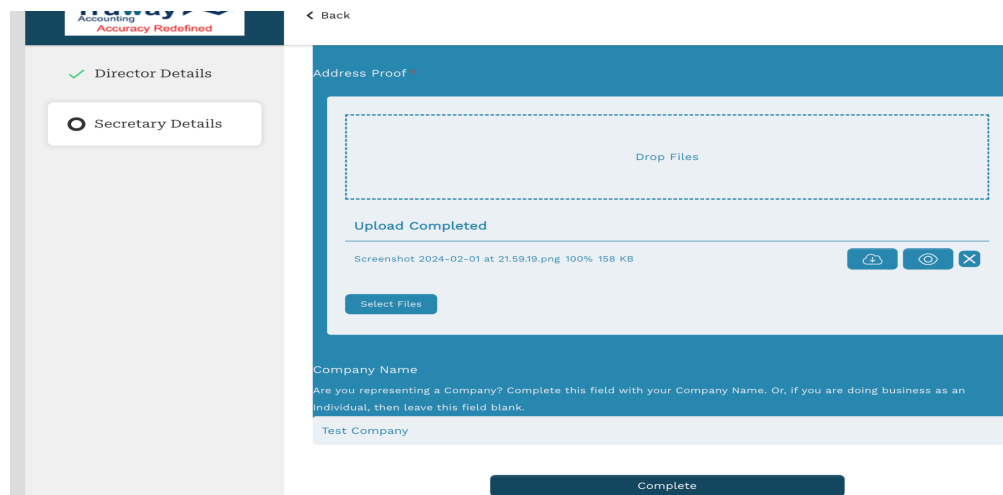
Additional Mandatory Details

When you log in for the first time, there will be a mandatory prompt waiting to be completed that is set by the admin. Same can be viewed in Notifications as well.



Click on the prompt and complete the details as required.

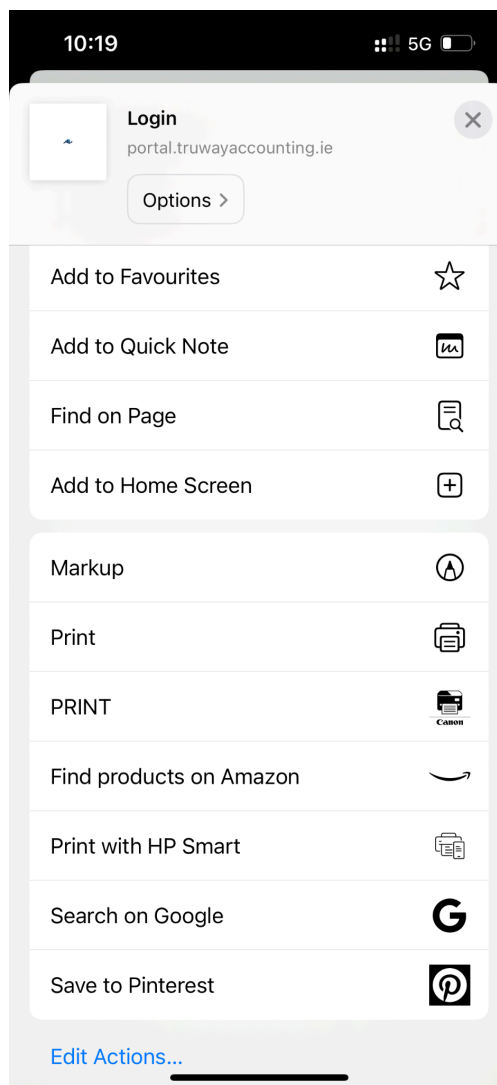
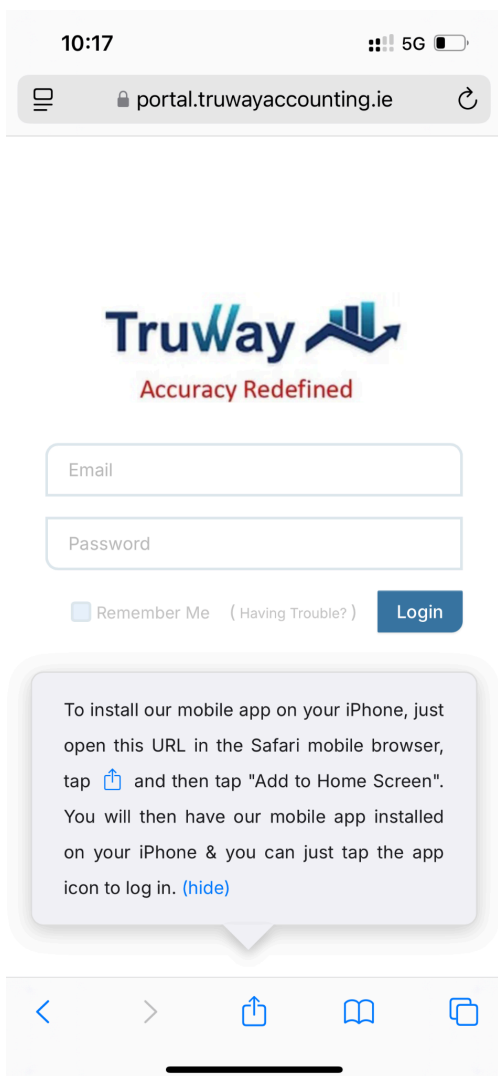
1. Fill the Director details, upload proofs as required.
2. Click on Continue
3. Fill the Secretary details, upload proofs as required
4. Click on Complete

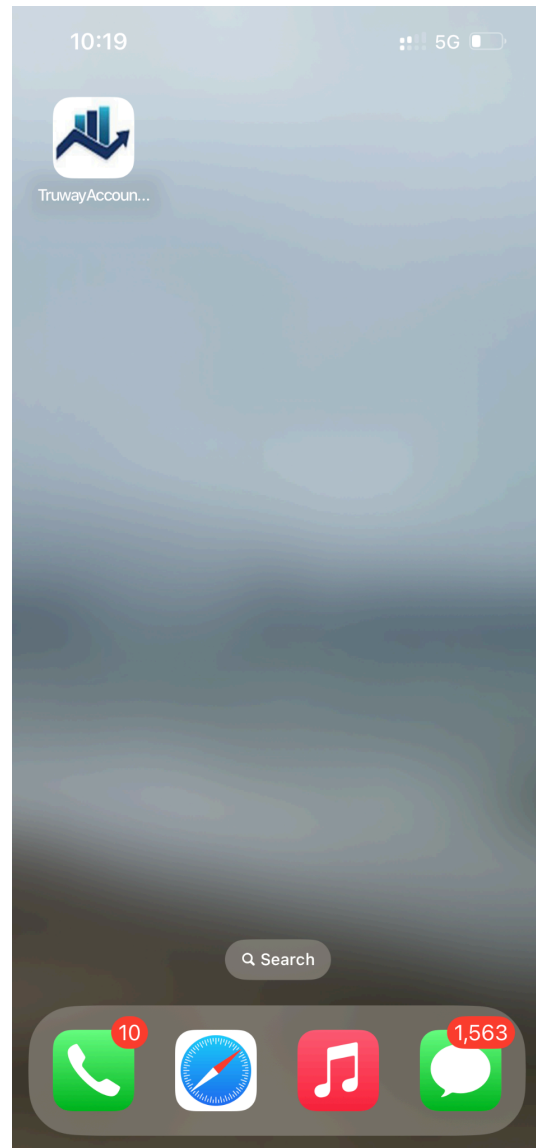
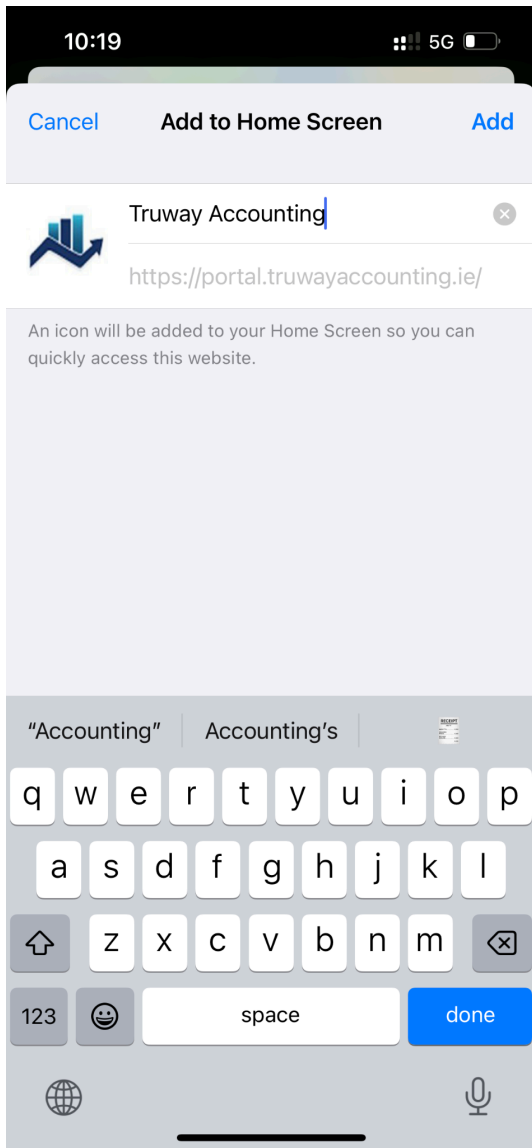


Mobile App

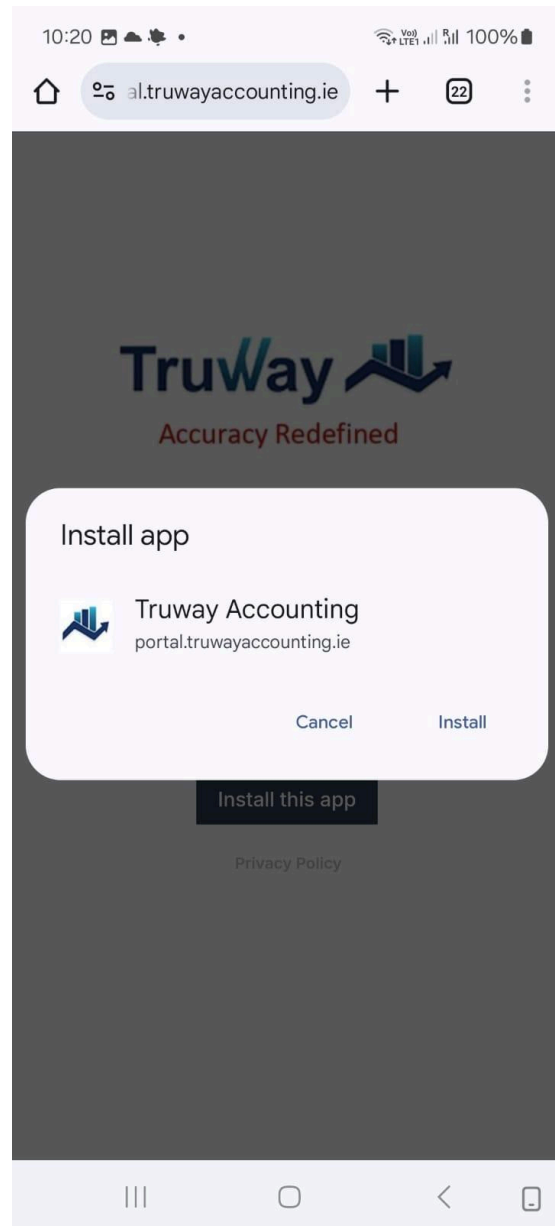
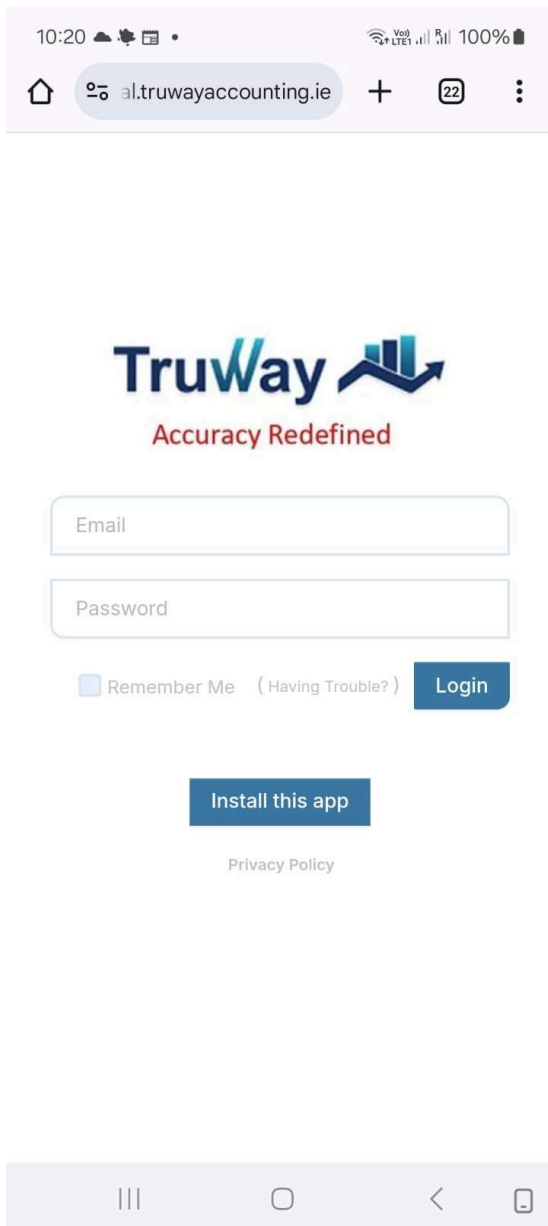
Please follow the steps to install the Progressive Web App in your Apple or Android phones.
More details about PWA - please read - [link](#)

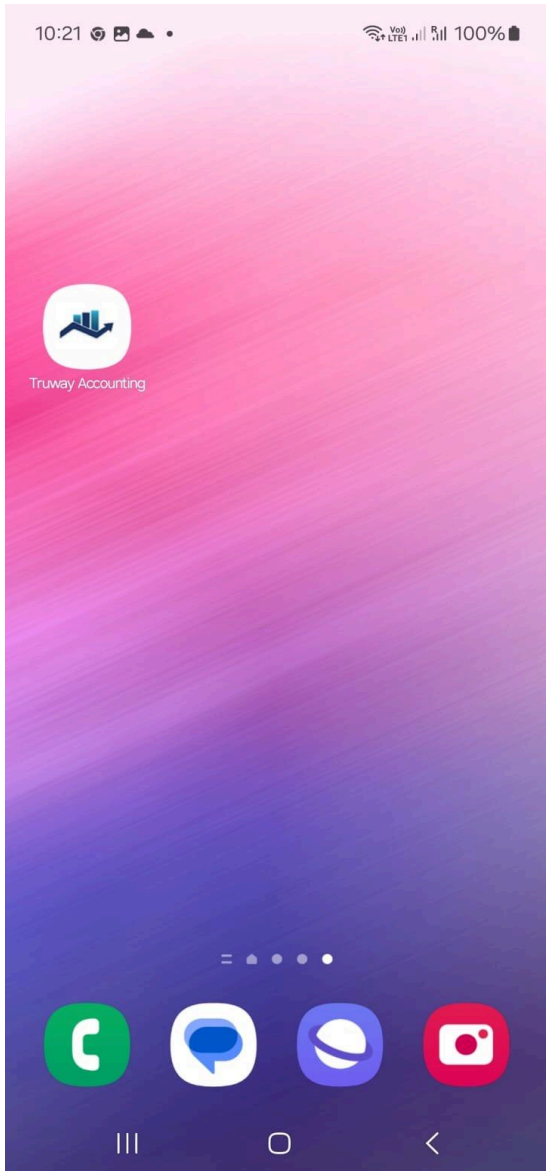
Apple





Android





2 Factor Authentication

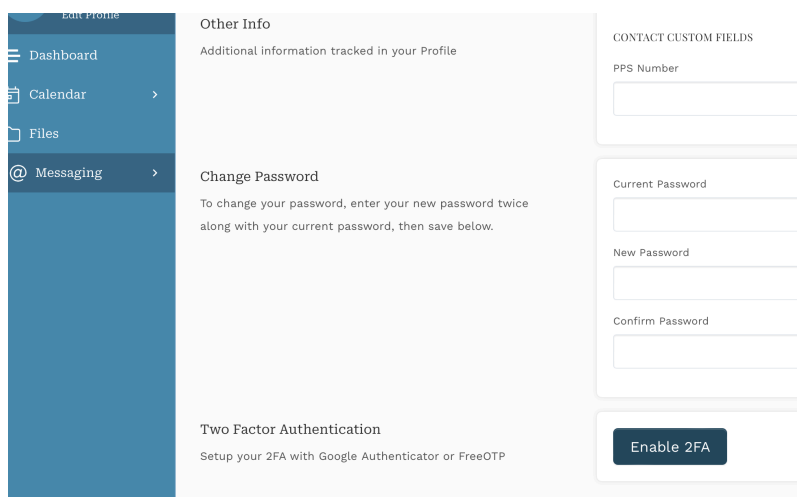
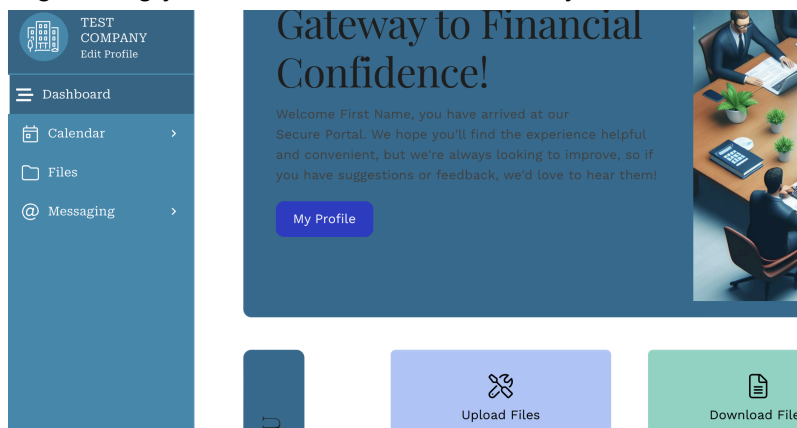
Portal access is secured using Two Factor Authentication which enables additional security to the application. In order to configure, you have to either use Google or Microsoft Authenticator

Google Authenticator : [Android](#) [iOS](#)

Microsoft Authenticator : [Android](#) [iOS](#)

IMPORTANT: You will be required to use your selected app to generate your One-Time Password every time you log in.

Login using your credentials and click on My Profile, then click on Enable 2FA



Scan the QR code with your authenticator app to generate a code, and enter it into the field above. Click Activate to finalize your 2FA settings.

Now every time you enter your username and password to log in, you will be sent a One-Time Password to your authenticator app.

Contact Us

For any help in accessing the portal, please contact us.