



# Associate User Manual

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**vatmate** is a trading division of iVAT Limited

## Change History

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Version	Date	Changed by	Description
1.0	12-May-2017	Gareth M. Davies	Base lined
1.1	05-Sep-2017	Tim Myerson	Updated images and text
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## 1. Introduction

This manual describes in detail how to create an account in the **vatmate®** application and set up the system to track your online sales, with a step by step description of the different parts of the application.

## 2. What is vatmate®?

**Vatmate®** is a system that provides online and distance sellers with the capability to track and manage their local VAT payments in relation to EU law.

## 3. Organisation of the Manual

### **General Information**

This section describes the system and its intended functionality.

### **System Summary**

An overview of the system outlining the uses of the software requirements, configuration, user access levels and system behaviour.

### **Work Flow**

Explaining the work flow of **vatmate®** in detail

### **Using the System**

A detailed description of the system functions.

### **Getting Started**

Takes you through creating an account.

### **Reporting**

Detailed descriptions of the reports.

## 4. General Information

The **vatmate**® Application is a Cloud based application. There are two main Components, one is based in the Associates environment, the second is based on **vatmate**® Administration Service Centre (the main Dashboard). It will deliver to you as an Associate a simple view of your sales record and its corresponding tax calculation along with the correct break-down of your sales in both tabular and graphical form.

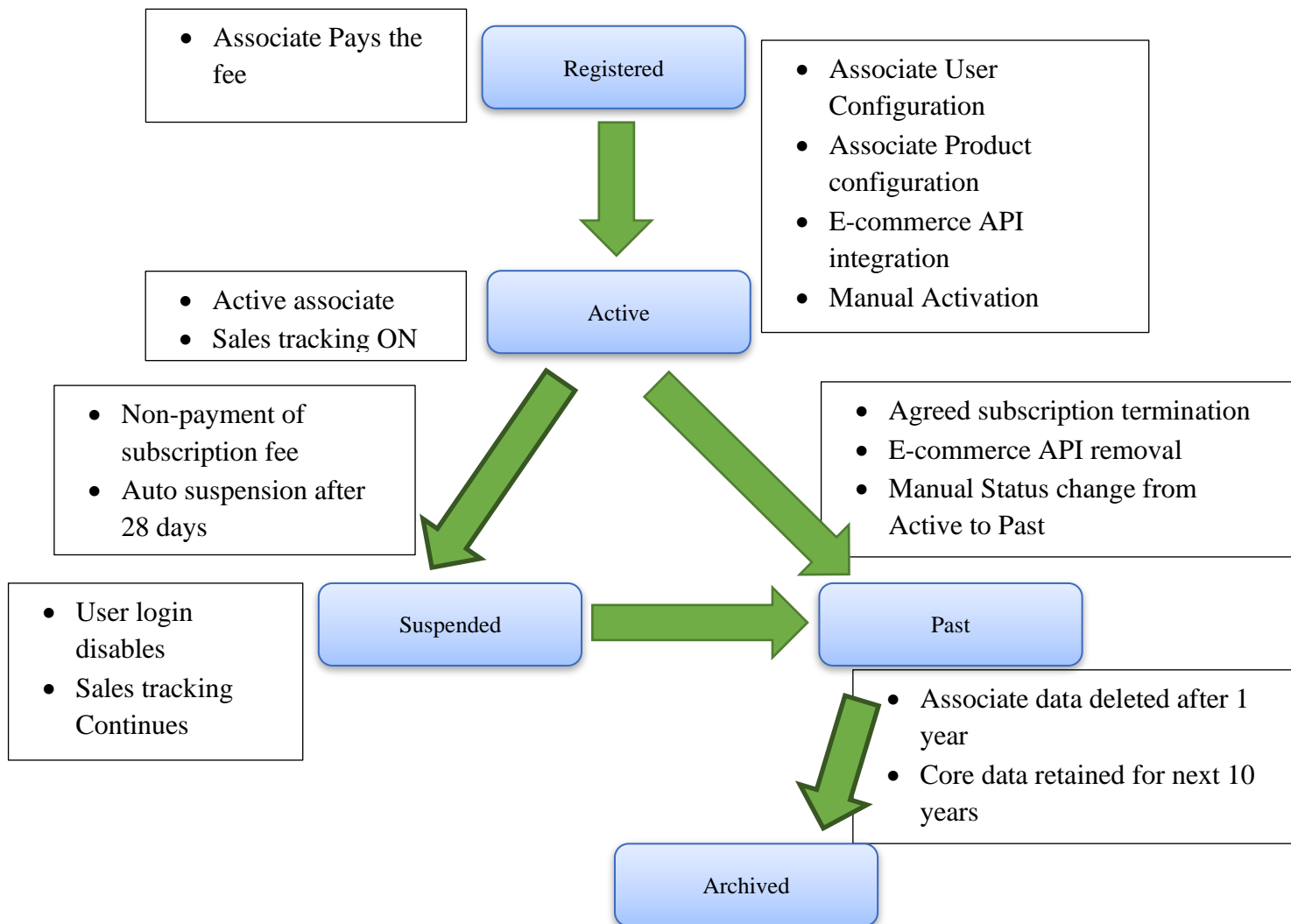
## 5. Understanding the Work Flow

- i. We call our customers Associates
- ii. There are 3 types of account in the **vatmate**® application:
  - Master Primary Account.
  - Primary Account.
  - Secondary Account.
- iii. As an Associate, you can have a total of 8 **vatmate**® user accounts:
  - 1 Master Primary Account
  - 2 Primary Accounts
  - 5 Secondary Accounts
- iv. All legal and official mails will be sent to the Master Primary account.
- v. When an Associate joins **vatmate**®, the Master Primary account is created automatically using the eMail id that is provided during the joining process.
- vi. The Master Primary User account has access to create more user accounts for the Associate.
- vii. The Master Primary User Account has access to assign or change a role to any user.
- viii. The Master Primary User Account also has authority to donate their Master Primary Role to any other Primary User.
- ix. Every **vatmate**® Associate can be in one or more of the following statuses:
  - Registered - You have completed your registration and paid your subscription fees to iVAT Limited (the parent company that owns the Brand).
  - Active - E-Commerce API integration and User configuration has been completed and sales tracking has started.
  - Suspended - An Associate has been defaulting in paying the monthly/annual subscriptions; the Associate is suspended from accessing the Administration Service Centre but their sales tracking is not stopped.
  - Past - When the Associate has not paid their subscription to **vatmate**® or has left **vatmate**® in mutual agreement with iVAT Limited. In this case sales tracking is stopped.
  - Archived - After the Associate remains in 'Past' status for 1 year at a stretch then the status is changed to 'Archived'. In this case all Associate Related data (All Users of the Associate, E-commerce, Item Configurations) will get deleted and only the core set of data (The transaction details of the Associate website that has been tracked by the application) are retained for the next 10 years.

- x. As an Associate you will receive a notification mail to pay the monthly subscription amount. One reminder mail per day will be sent from 3 days prior to the subscription end date till 27 days after the subscription end date or till the Associate makes the payment.
- xi. After 27 days of the subscription end date if the Associate does not pay the due amount then the Associate gets 'Suspended'. In this situation users of this Associate will be blocked from logging in to the **vatmate**® Application, but the **vatmate**® application continues to track the sales transactions in the Associate e-commerce website.
- xii. The payment of Monthly Subscription fee can be done from the **Payment** submenu under **vatmate**® **Subscription** menu. This is discussed in detail in section 9.4.2.
- xiii. A suspended Associate can again resume using the **vatmate**® application after clearing his dues by contacting **vatmate**®.

*Note: The work flow of the iVAT **vatmate**® platform may change with prior notification, the final decision being taken by **vatmate**® administration.*

## 6. LIFE CYCLE OF AN ASSOCIATE IN VATMATE





## 7. GETTING STARTED

This section explains how to create an account for accessing the **vatmate®** application.

*Note: The user needs to have a valid VAT number to create a **vatmate®** account*

## 8. ASSOCIATE JOINING FIRST PAGE

**vatmate**

### Let's get to know you...

All fields marked \* are mandatory

Company Name *	1	<input type="text" value="Enter the name of the VAT registered business HERE"/>
VAT Registered *	2	<input checked="" type="radio"/> Yes <input type="radio"/> No
Country Code *	3	<input type="text" value="Please choose one..."/>
VAT Number *	4	<input type="text" value="Please enter VAT Number without country code"/>
Business Type *	5	<input type="text" value="Please choose one..."/>
	6	<input type="button" value="NEXT"/>

Fig. 1.1

The User Joining page 1 is shown in figure 1.1

*NOTE: In case of VAT check failure please refer to Additional section.*

*NOTE: In case of Payment failure please refer to Additional section.*

1. **Business Name**

Please enter the name of the organisation.

2. **Vat Registered?**

Check Box field to select whether the business is VAT registered or not.

3. **Where are you based?**

Please select the country in which the businesses' VAT number is registered.

4. **VAT Number**

Please enter the VAT Number of the company. This is automatically validated and will display a green tick if the number is valid (and entered with no spaces):

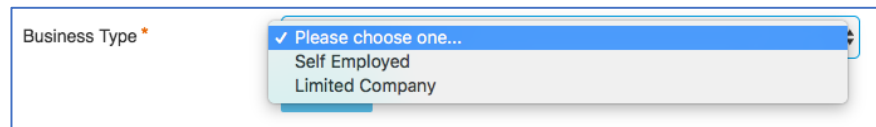
VAT Number \*  

if an invalid number is entered a red cross is displayed:

VAT Number \*  

5. **Business Type**

Please select the category of business that the company belongs to. Refer figure 1.2



Business Type \* ✓ Please choose one...  
Self Employed  
Limited Company

Fig. 1.2

**Company Number**

Please enter the Company Number of Company in case 'Limited Company' is selected.

*Note: If Business Type is 'Limited Company' then Company Number field becomes Mandatory.*

6. **[Next]**

Please Click the [Next] button to proceed to the next page.

## 9. ASSOCIATE JOINING DETAIL PAGE

**vatmate**

### Getting to know you...

All fields marked \* are mandatory

Company Name	1	vatmate
Contact Name *	2	First and Last Name
eMail *	3	eMail address
Re-enter eMail *	4	Re-enter eMail
Phone *	5	Insert number including country code e.g. +44 (0)1234 567890
Address 1 *	6	Address 1
Address 2 *	7	Address 2
Address 3	8	Address 3
Town/City *	9	Town/City
County/State *	10	County/State
Country *	11	Please choose one...
Post/Zip Code *	12	Post Code or ZIP Code

13 **BACK** **NEXT** 14

Fig. 1.3

The User Joining page 2 is shown in figure 1.3

**1. Associate's Business Name**

This is a read only field for this page, the Business Name entered on the previous page will be displayed.

**2. Contact Name**

Please enter the contact name.

**3. Contact eMail**

Please enter the official eMail id that you intend to use for this vatmate account. This eMail id will be treated as the Primary Master User Name.

**4. Re-enter Contact eMail**

Please enter the eMail id that you have entered in the 'Contact eMail field'.

**5. Contact Phone**

Please enter the official phone number.

**6. Contact Address1**

Please enter the address.

**7. Contact Address2**

Please enter the address.

**8. Contact Address3**

Please enter the address.

**9. Postal Town/City**

Please enter the town/city name.

**10. Country/State**

Please enter the Country/State name.

**11. Country**

Please select the country name.

**12. Post/Zip Code**

Please enter the Post/Zip code.

**13. [Back]**

Click the **[Back]** button to navigate to the previous page.

**14. [Next]**

Click the **[Next]** button to proceed to the next page.

## 10. JOINING PAYMENT PAGE

The screenshot shows the 'vatmate' logo at the top. Below it is the title 'Payment Details'. A note states 'All fields marked \* are mandatory'. The form contains the following fields and elements:

- 1. Company Name: Text input with 'vatmate' entered.
- 2. Service \*: Dropdown menu with 'Please choose one...'.
- 3. Payment Type \*: Dropdown menu with 'Please choose one...'.
- 4. Payment Method \*: Dropdown menu with 'Please choose one...'.
- 5. Joining Amount: Text input.
- 6. Payable Amount: Text input.
- 7. Apply Voucher Code: Text input next to an 'APPLY' button.
- 8. Terms and Conditions: A checkbox followed by the text 'I have read, understood and shall abide by the [Terms and Conditions](#) of Vatmate services'.
- 9. BACK: A blue button.
- 10. PLACE YOUR ORDER: A blue button.

Fig. 1.4

The User Joining page 3 is shown in figure 1.4

*NOTE: In case of Payment failure please refer to Additional section.*

1. **Associate's Business Name**

This is a read only field for this page, the Business Name entered in the previous page will be displayed.

2. **Choosing the vatmate Service**

Please choose the vatmate service that you want to subscribe to.

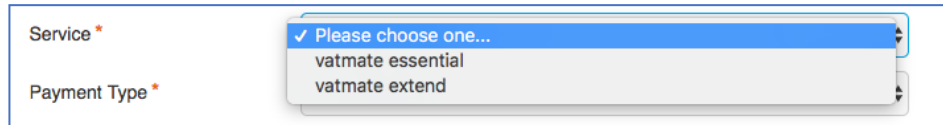
A screenshot of a web form. It shows two labels: 'Service \*' and 'Payment Type \*'. The 'Service \*' label is above a dropdown menu that is open, showing three options: 'Please choose one...' (with a checkmark), 'vatmate essential', and 'vatmate extend'. The 'Payment Type \*' label is below the 'Service \*' label and is not yet filled in.

Fig. 1.5

The services that are available in the vatmate application are shown in fig 1.5

3. **Payment Type**

Currently only monthly payment is available.

4. **Payment Method**

Select the appropriate payment method to pay for the service you have chosen.

5. **Sign Up fee**

A onetime fee collected during joining process.

6. **Monthly Fee**

The Payable Amount is the sum of subscription fee (Monthly Fee/Annual Fee) + Setup Amount.

7. **Apply Voucher Code**

If you have a Voucher Code enter it into this box and click the 'APPLY' button, the associated discount will be applied.

8. **Accept Terms and Conditions**

The Terms and Conditions related to the business functions of **vatmate** services are available via the link, you have to accept them to proceed.

9. **[Back]**

Click the [Back] button to navigate to the previous page.

10. **[Place your order]**

Click this button to proceed to the payment gateway page.

After completing payment through the payment gateway that you select, the following steps will take place:

A 'Welcome to **vatmate®**' eMail will be sent to the registered eMail ID that has been provided during the joining process. This eMail will contain the 'Invoice' of your payment. The invoice is shown in fig. 1.6

vatmate

**PAYMENT RECEIPT**

<b>Businessmate Limited</b> boss@businessmate.com 1172002000 GB-118004236	PAYMENT TYPE : Joining Payment PAID USING : TRANSACTION NO : 74296773JB722231W PAYMENT DATE : 15/06/2017
--	---

PRODUCT	PAYMENT MODE	AMOUNT TO BE PAID (GBP)
vatmate essential	Monthly	154.80
<i>* Including Joining Setup Fee</i>		
<i>One Hundred Fifty Five Only</i>	<b>TOTAL AMOUNT PAID :</b>	<b>154.80</b>

*\* This is a computer generated invoice.No signature required.*

15/06/2017

Fig. 1.6

The Invoice is shown in fig. 1.6

A 'User Joining' mail will be sent to the registered eMail ID that has been provided during the joining process. This eMail will contain a link to set up the password for the Primary Master **vatmate®** User Account.



## 11. USER PASSWORD CREATION

1. Click on the link that is sent in the 'User Joining' mail.
2. This mail will redirect to the 'Please enter your Password' page. This page is shown in fig. 1.7.

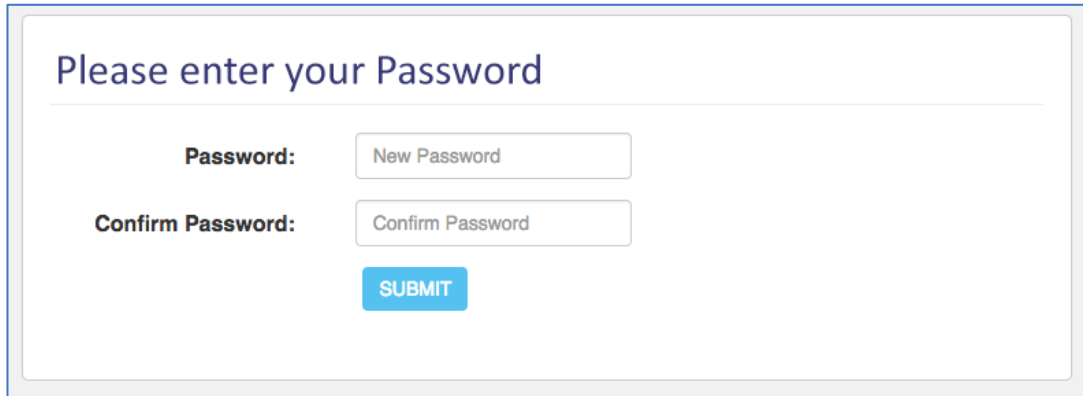


Fig.1.7

1. **Password**  
Please enter the password in this field.
2. **Confirm Password**  
Please enter the **same password** that was entered in the previous field.
3. **[Submit]**  
Clicking the [Submit] button will bring a pop-up showing the message that 'You have successfully set your password'. The pop-up is shown in fig. 1.8.

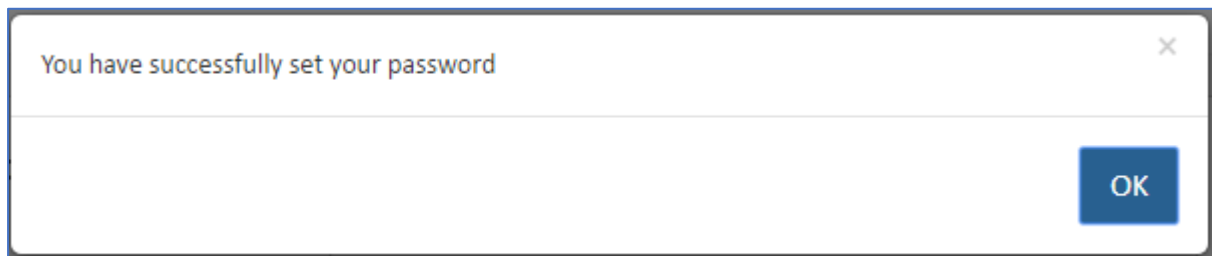


Fig.1.8

3. Click the [OK] button.
4. This will navigate to the 'Set your Security Questions' page. This page is shown in fig. 1.9.

The image shows a web form for security verification. It contains three identical sets of input fields. Each set starts with a label 'Security Question 1:', 'Security Question 2:', or 'Security Question 3:' followed by a small orange box containing a number (1, 3, or 5). To the right of the number is a text input field containing the placeholder text 'Security Question 1', 'Security Question 2', or 'Security Question 3'. Below each question is a label 'Answer:' followed by another orange box with a number (2, 4, or 6) and a corresponding text input field with the placeholder 'Answer'. At the bottom of the form, there is an orange box with the number 7 and a blue button labeled 'SUBMIT'.

Fig.1.9

Security Questions and Answers are used to verify user authenticity in the forgotten password process.

**1. Security Question 1**

Choose and enter your first Security Question.

**2. Answer**

Enter the answer to the first security question.

**3. Security Question 2**

Choose and enter your Second Security Question.

**4. Answer**

Enter the answer to the Second security question.

**5. Security Question 3**

Choose and enter your third Security Question.

**6. Answer**

Enter the answer to the third security question.

## 7. **[Submit]**

Clicking this button will set all the security questions and redirect you to the **vatmate®** User Login page.

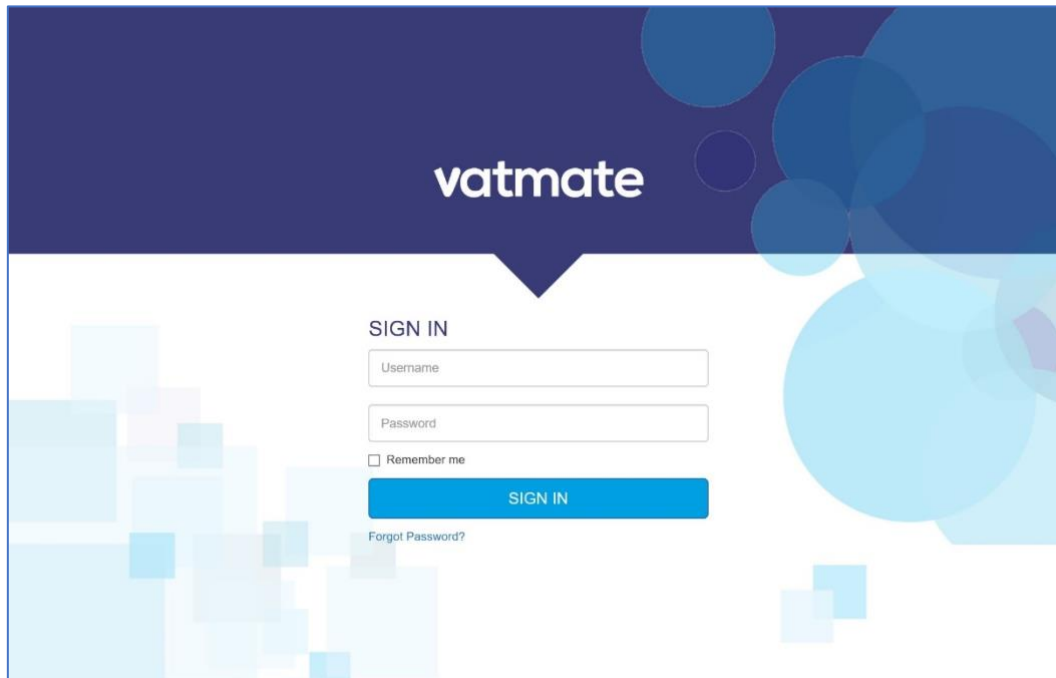


Fig. 2.0

The '**vatmate®** Login' page is shown in fig. 2.0

Enter the User Name and the Password and click on the **[Sign In]** button.

Only the correct User Name and Password will allow the user to log into the **vatmate®** Application.

*Note that the eMail address entered during the joining process is the 'Username'*

## 12. ROLE-BASED DASHBOARD

The Dashboard display presents information appropriate to the role of the user.

13. PRIMARY MASTER USER DASHBOARD

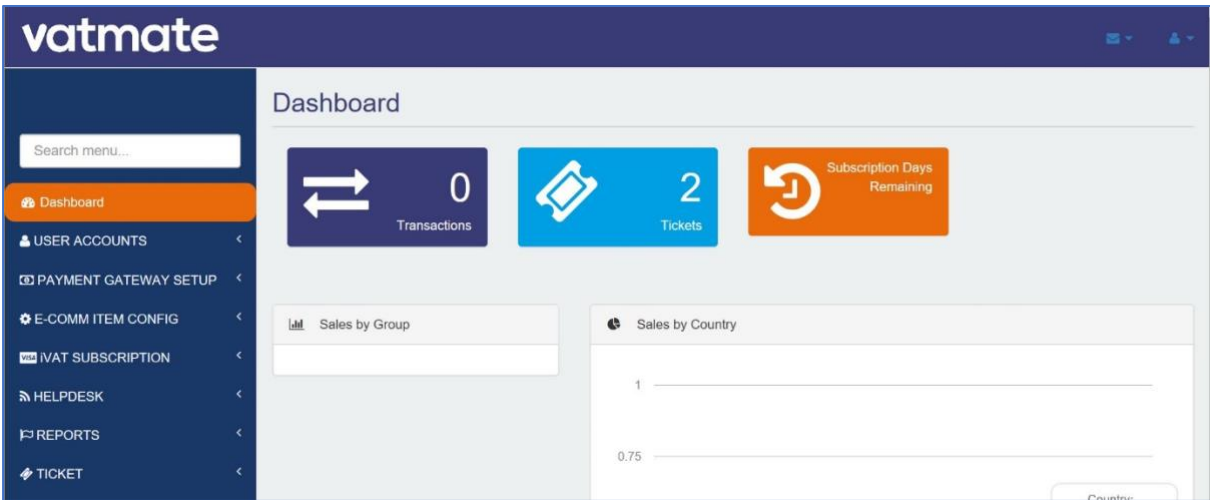


Fig. 2.1

The Dashboard of the Primary Master User Account is shown in fig. 2.1.

14. ASSOCIATE PRIMARY USER DASHBOARD

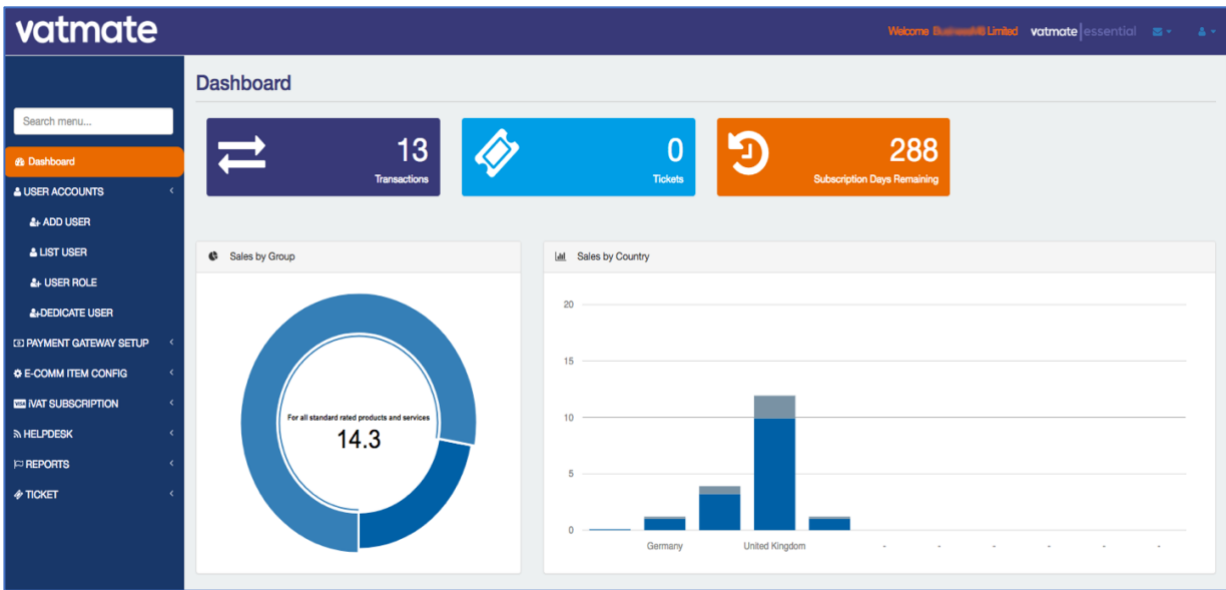


Fig. 2.2

The Dashboard of the Primary User Account is shown in fig. 2.2

15. ASSOCIATE SECONDARY USER DASHBOARD

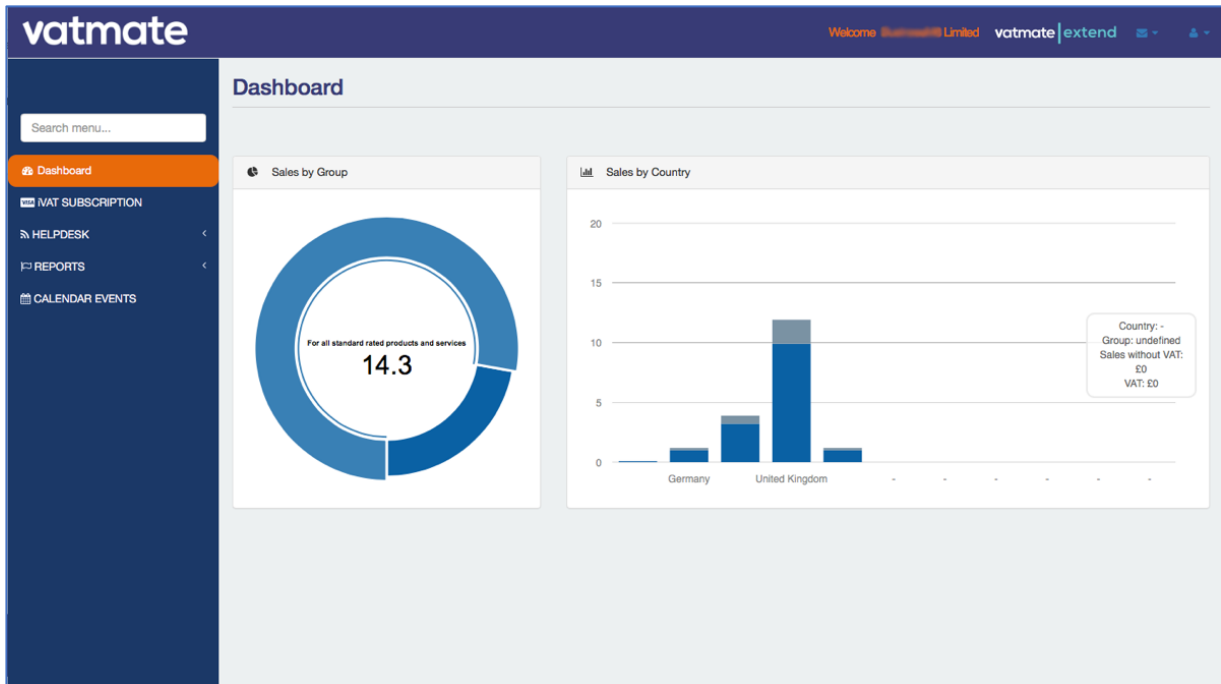


Fig. 2.3

The Dashboard of the Secondary User Account is shown in fig. 2.3

## 16. USING THE SYSTEM

The Primary Master Dashboard contains the maximum menus for an Associate in **vatmate®** application.

The detailed controls and menus are as follows:

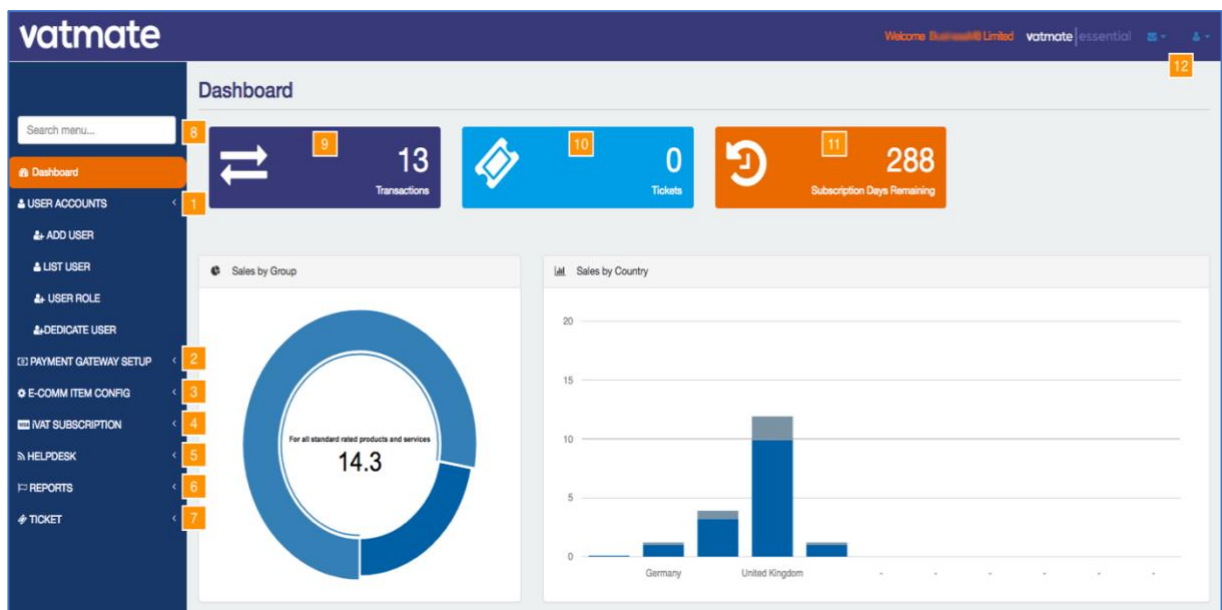


Fig. 2.4

The Dashboard of the Primary User Account is shown in fig. 2.4

Clicking on the Dashboard option, the application navigates back to the dashboard view from any page, as shown in fig. 2.4

## 17. USER ACCOUNTS

The User Accounts menu handles operations related to User Creation, List of Users, and User Role assignment. The Sub menus in the User Accounts menu is shown in fig. 2.5.

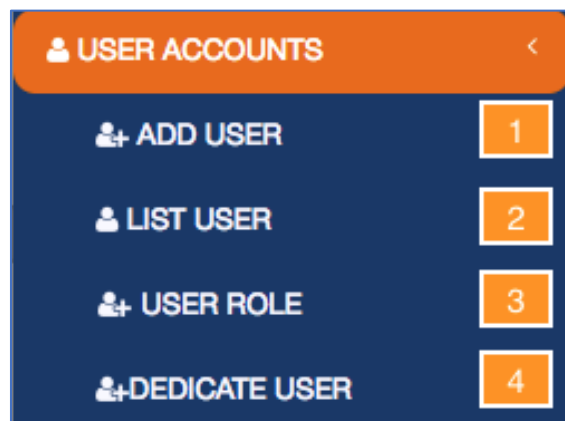


Fig. 2.5

Sub Menu of **User Accounts** menu is shown in fig. 2.5.

## 18. ADD USER

This menu allows the creation of a new user account for your Associate account. It is only available to the Primary User.

The screenshot shows a web form titled "Add User" with a sub-header "Add Users". The form contains the following fields and elements:

- First Name**: A text input field with a placeholder "First Name". It is labeled with a blue box containing the number 1.
- Last Name**: A text input field with a placeholder "Last Name". It is labeled with a blue box containing the number 2.
- User Name**: A text input field with a placeholder "Email". It is labeled with a blue box containing the number 3.
- Re-enter User Name**: A text input field with a placeholder "Re-enter Email". It is labeled with a blue box containing the number 4.
- Phone Number**: A text input field with a placeholder "xxxxxxxxxx". It is labeled with a blue box containing the number 5.
- Admin Note**: A large text area for notes. It is labeled with a blue box containing the number 6.
- Buttons**: Two blue buttons labeled "SUBMIT" and "RESET". The "SUBMIT" button is labeled with a blue box containing the number 7, and the "RESET" button is labeled with a blue box containing the number 8.

Fig. 2.6

The **ADD USER** page is shown in Fig. 2.6

**1. First Name**

Please enter the First Name of the new user.

**2. Last Name**

Please enter the Last Name of the new user.

**3. User Name**

Please enter the eMail address of the new user.

*Note: The eMail id is entered is deemed as the User ID of the new account and it should be unique.*

**4. Re-enter User Name**

Please enter the eMail address entered in the previous field.

**5. Phone Number**

Please enter the phone number of the new user.

**6. Admin Note**

Please enter any notes you wish to make regarding the user you are setting up.

## 7. **[Submit]**

Clicking the [Submit] button will create the new user and the page will navigate to the List User page. The List User page is shown in fig.2.7.

## 8. **[Reset]**

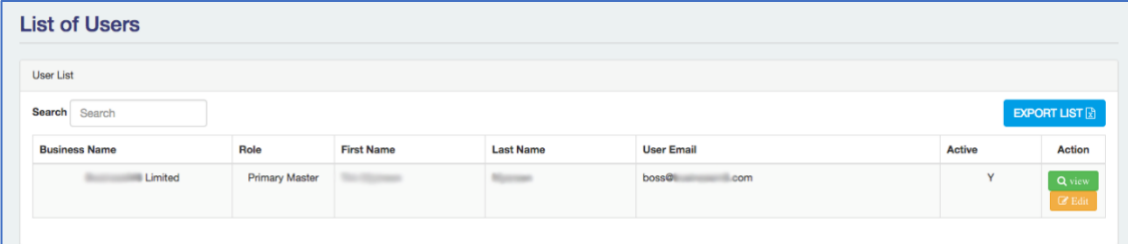
Clicking the [Reset] button will reset the values entered in the previous fields.

Refer to section 8.1.3.1 for Role Assignment to the new User.

For User password creation please follow the section 6.4.

## 19. **LIST USER**

This page shows the list of users that has been created specific for Associate. This is shown in fig. 2.7



Business Name	Role	First Name	Last Name	User Email	Active	Action
Boss Limited	Primary Master	Boss	Boss	boss@boss.com	Y	<a href="#">View</a> <a href="#">Edit</a>

Fig. 2.7

### **[View] Button**

The [View] button redirects to the **View User** page which shows the details of the user. All the fields are non- editable in this page. The **View User** page is shown below 2.8.

### **[Edit] button**

The [Edit] button redirects to the **Edit User** page. All the fields are editable except the following field:

- User Name
- EMail
- Created On
- Created By
- Changed On
- Changed By

The Edit User page allows the Associate edit the user details



## 20. [VIEW USER](#)

The **View User** shows the details of the User that is selected and also allows the Associate to see the **Audit** report and also allows that particular User to change the password incase the User has lost the Password along Security Answers.

The **View User** page is shown in fig2.8.

The screenshot shows a web form titled "View User". Below the title is a sub-header "View Users". The form contains several input fields with the following labels and values:

- User ID: 8
- User Name: boss@...com
- First Name: [Redacted]
- Last Name: [Redacted]
- Created On: 2017-06-15
- Created By: SYS
- Changed On: 2017-08-31
- Changed By: boss@...com
- Status: Yes
- Email: boss@...com
- Phone Number: [Redacted]
- Admin Note: [Redacted]

At the bottom of the form, there are three buttons: "BACK TO USERS LIST", "AUDIT" (labeled with a yellow box containing the number 1), and "RESET PASSWORD" (labeled with a yellow box containing the number 2).

Fig. 2.8

## 21. [AUDIT](#)

The Audit button generates the audit report of any changes that is made to any record in the User details of the particular User that is selected.

The Audit Report for User Details is shown in fig. 2.9

AUDIT REPORTS : IVAT USER						vatmate	
Record	Column	New Value	OldValue	Changed on	Changed By		
boss@...com	Role Change	Primary Master	--	6/15/17 10:50 AM	SYS		
	PHONE_NUMBER	1934 441144	1172002000	8/7/17 9:44 AM	boss@...com		

Fig. 2.9

## 22. PASSWORD RESET

*Note: For Users who have lost their password but have the answers to the Security Questions that were set during User Account creation, please refer to Section 9.3 to reset their Password*

In case any User losses the User Account along with answers to the Security that is set during Account creation then the Primary Master User can generate a reset password link.

Clicking on the [**Reset Password**] button will send a Password Reset mail to the registered eMail id of the concerned User.

Clicking on this link will redirect the User to Password reset page.

This is shown in fig. 1.7

Then follow steps 1, 2, 3, 4 in section 7.4 to complete the Password Reset Process.

## 23. USER ROLE

## 24. ROLE ASSIGNMENT

User Role assignment is a mandatory process, every user must be assigned to a role (Associate Primary or Associate Secondary roles). The Add User Role page is shown in fig.3.0.

The screenshot shows a web form titled "Add User Role". Inside the form, there is a section labeled "User Role". This section contains two main input areas. The first is "Select User Name", which is a dropdown menu currently showing "--SELECT USER--"; this element is highlighted with an orange box and the number 1. The second is "Select User Role", which contains two radio button options: "Associate\_Primary" and "Associate\_Secondary". The "Associate\_Primary" option is selected and highlighted with an orange box and the number 2, while the "Associate\_Secondary" option is unselected and highlighted with an orange box and the number 3. Below these options is a blue button with the text "BACK TO DASHBOARD".

Fig. 3.0

### 1. Select User Name

Please select the User Name from the drop down.

**2. Select User Role**

Please check the appropriate role.

After role assignment a pop-up message appears. This is shown in fig. 3.1.

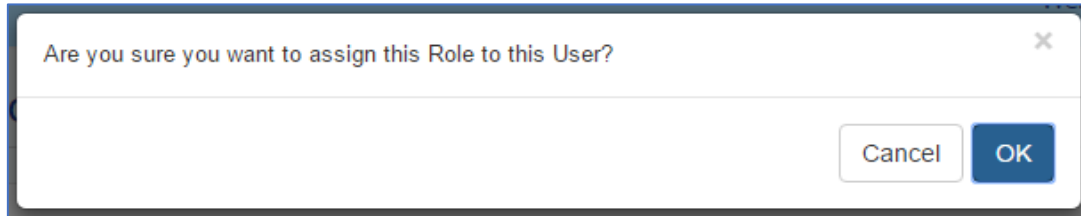


Fig. 3.1

- 3.** Clicking the [OK] button will display another pop-up message. This is shown in fig.3.2.

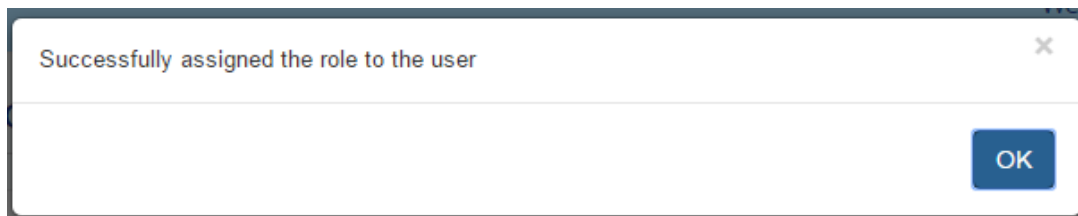


Fig. 3.2

- 4.** Click the [OK] button and role assignment is completed.  
**5.** Clicking the [**Back to Dashboard**] button will take you to main dashboard which is shown in fig. 2.1.

## 25. ROLE DE-ASSIGNMENT

1. For de-assignment of a role from a User follow the steps in point **1** of section **8.1.4.1**.
2. After selecting a User from "Select User Name" drop-down list the checked box shows the current role assigned to the that User
3. Uncheck the Check box. This will give a pop-up message. This is shown in fig. 3.3.

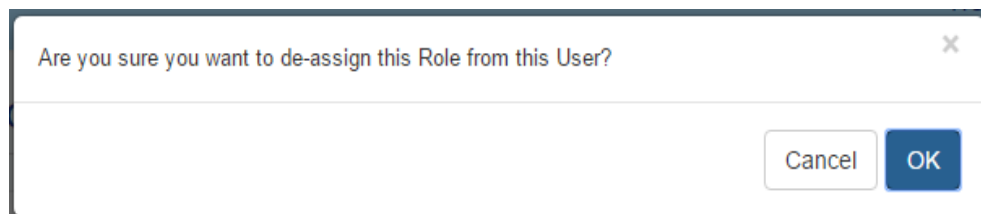


Fig. 3.3

4. Click the [OK]button.
5. Now none of the Check boxes are checked.
6. Then follow the steps in **points 2, 3, 4** of section **8.1.3.1**.

*Note: A single user can have only one role assigned at a particular time.*

## 26. DEDICATE USER

Dedicate User Role menu helps the Primary Master User to assign his Primary Master User Role to any of the Associate Primary Users of that Associate. There can be only 1 Primary Master User for Associate, A Primary Master can delegate his role to any further Associate Primary User only. In this case two users can switch their roles accordingly.

The Dedicate User Role page is shown in fig. 3.4.

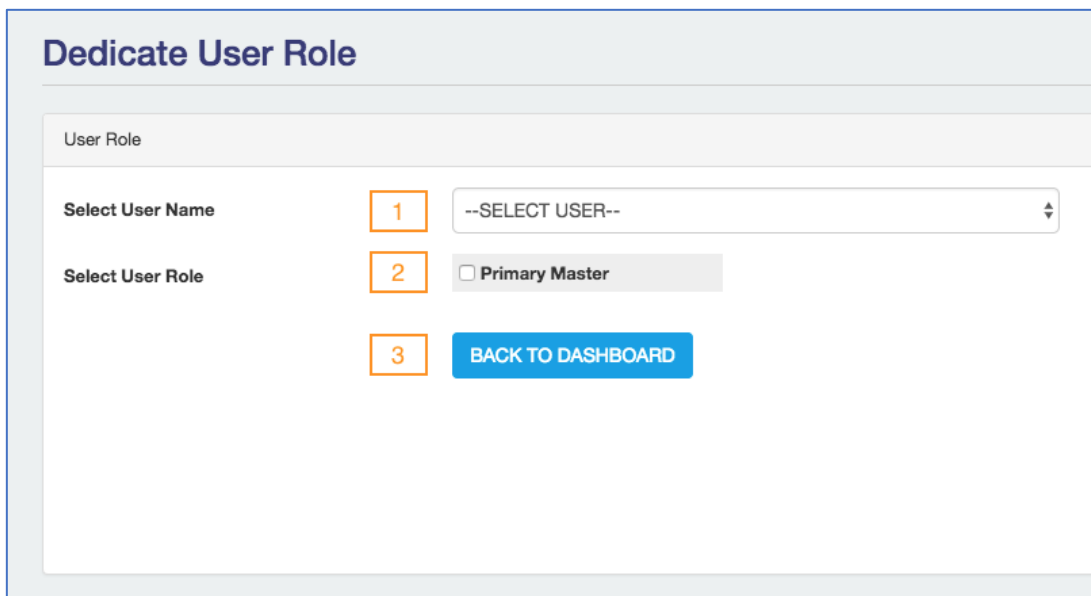


Fig. 3.4

1. **Select User Name**  
Please select the Associate Primary User to whom the Primary Master Role will be assigned from the drop down menu.
2. **Select User Role**  
Please check the **Primary Master** role.
3. After the check box is checked a pop-up message appears. This is shown in fig. 3.5.

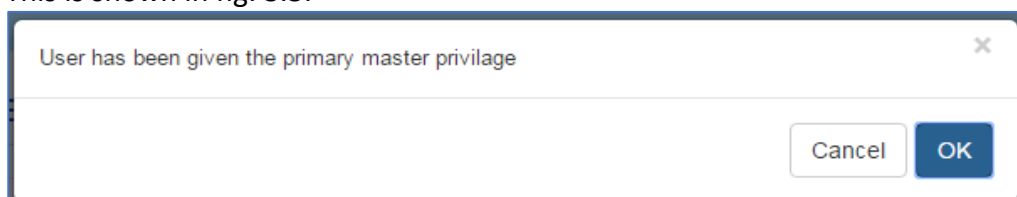


Fig. 3.5

4. Clicking the [OK] button will log the user out of the application as the role assignment process is complete and the new User is assigned to **Primary Master** User Role while the User having Primary Master Role earlier is assigned to the **Associate Primary** User Role.

## 27. E-COMM ITEM CONFIG

The Digital Items that the Associate's E-Commerce website sales are configured to the **vatmate®** application from the E-Comm Item Config menu.

The E-Comm Item Config menu along with its sub menu is shown in fig. 4.1.



Fig. 4.1

## 28. ADD ITEM

All the digital items that the Associate's website sells are added to the **vatmate®** application for configuration from the **Add Item** sub menu.

The Add Item page is shown in fig. 4.2.

*Note: All the Items added should have a unique Item.*

A screenshot of a web form titled "Associate Item" in a light blue header. The form has a light gray background and contains several input fields and buttons. The fields are labeled "Select Product group Name", "Item Code", "Item Description", and "Item Type". The "Select Product group Name" field is a dropdown menu with "--SELECT PRODUCT GROUP--" selected. The "Item Code" field is a text input. The "Item Description" field is a larger text area. The "Item Type" field has two radio buttons: "Digital" (selected) and "Non-Digital". At the bottom of the form are three buttons: "SUBMIT" (blue), "RESET" (blue), and a small orange square with the number "6". There are also orange squares with numbers "1", "2", "3", "4", and "5" next to their respective labels.

**1. Select Product Group Name**

**Product Group**

These are the product groups that are defined by the European Market.  
Please select the Product group to which the item that is being configured belongs.

**2. Item Code**

Please enter the unique code of the item that is being added for configuration with the **vatmate®** Application.

**3. Item Description**

Please enter the description of the Item that is being added for configuration with the **vatmate®** Application.

**4. Digital or Non-Digital**

Please select mode/method of delivery – by digital download or by non-digital means.

**5. [Submit]**

Clicking the **[Submit]** button will save the Item that is added and it will be configured with the **vatmate** Application. The page will be redirected to the **List Item** page where the list is updated with the new item that is added.

**6. [Reset]**

Clicking the **[Reset]** button will clear all the entries that were made in points 1, 2 and 3.

**29. LIST ITEM**

The List Item menu shows the List of Items that are configured and also generates the Audit report of the Items that are added with the **vatmate®** Application for the Associate that has logged in.

The List Item page is shown in fig. 4.3.

List Of Associate Product						
List Of Associate Product						
Search <input type="text"/>						
Product Id	Associate Id	Product Group Id	Item Code	Item Desc	Active	Action
64	117	7	V001	Accomodation	Y	<input type="button" value="Q view"/> <input type="button" value="Edit"/>
65	117	8	V002	Events	Y	<input type="button" value="Q view"/> <input type="button" value="Edit"/>

Fig. 4.3

### [View] Button

The **[View]** button redirects to the **View Item** page which shows the details of the Item that is configured to the **vatmate®** application and all the fields are non-editable in this page.

### [Edit] button

The **[Edit]** button redirects to the **Edit Item** page all the fields are editable except the **Associate ID** field.

The **Edit Item** page allows the Associate edit the item details.

The **[Show History]** button generates the **Audit** report of any changes that is made to any record of the **List Item** table.

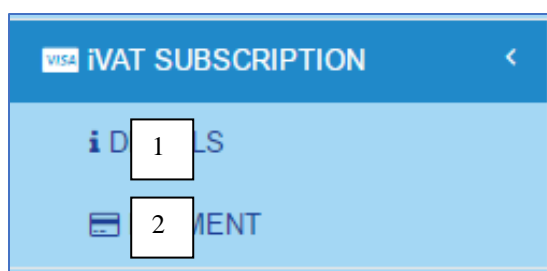
The **Audit** report of the **Associate Item** is shown in fig. 4.4

AUDIT REPORTS : ASSOCIATE E-COMM ITEMS					
vatmate					
Record	Column	New Value	OldValue	Changed on	Changed By
BM8-001	ACTIVE	N	Y	6/23/17 11:35 AM	boss@.com
BM8-002	ACTIVE	N	Y	6/23/17 11:35 AM	boss@.com
BM8-005	PROD_GROUP_ID	19	34	6/24/17 9:13 AM	boss@.com
	PROD_GROUP_ID	18	19	8/24/17 11:25 AM	boss@.com
	PROD_GROUP_ID	15	18	8/24/17 3:19 PM	boss@.com

Fig. 4.4

### 30. IVAT LIMITED SUBSCRIPTION

All the current subscription related information of the Associate (such as **vatmate®** service, Payment Mode – Monthly or Annual) is present in the **iVAT Subscription Menu** as shown in fig. 4.5.



### 31. DETAILS

The current subscription (like **vatmate®** service, Payment Mode – Monthly or yearly) that the Associate is holding is shown in the in the **Details** submenu.

### 32. PAYMENT

The **Payment** menu redirects to the **Monthly Payment** page where the Associate can make the payment when the Associate is under **Monthly** payment mode.



The **Monthly Payment** page is shown in fig. 4.6

The screenshot shows a web form titled "Monthly Payment". It contains four labeled fields, each with a numbered orange box next to it: 1. "Service" with a text input field containing "vatmate extend"; 2. "Payment Amount" with a text input field containing "48"; 3. "Payment Method" with a dropdown menu showing "Please choose one..."; and 4. A blue button labeled "MAKE PAYMENT" with a credit card icon.

Fig. 4.6

*Note: The Payment menu is active from 3 days prior to the subscription end date till 27 days after the subscription end date or till the Associate makes the payment.*

#### 1. **Services**

The **Services** field displays the current service that the Associate is holding.

#### 2. **Payment Amount**

The Payment Amount field shows the monthly amount that has to be paid for the current **vatmate** Service that the Associate is holding.

#### 3. **Payment Method**

Please select the method to pay iVAT Limited.

#### 4. **[Make Payment]**

Please click **[Make Payment]** button to navigate to the payment gateway page in order to complete the payment.

### 33. **HELPDESK**

The **Helpdesk** menu contains the List of 'Frequently Asked Questions' i.e. the list of FAQs and also gives the link from where the Associate can view and download the **User Manual**.

The Helpdesk menu along with its submenus are shown in fig. 4.7

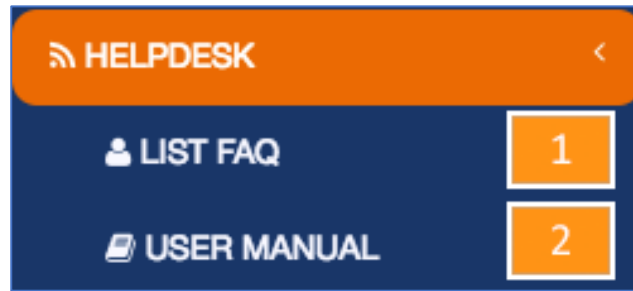


Fig. 4.7

### 34. LIST FAQ

The List FAQ menu allows the Associate to view the list of 'Frequently Asked Questions' that are already added by the iVAT Admin.

The List FAQ page is shown in fig. 4.8.

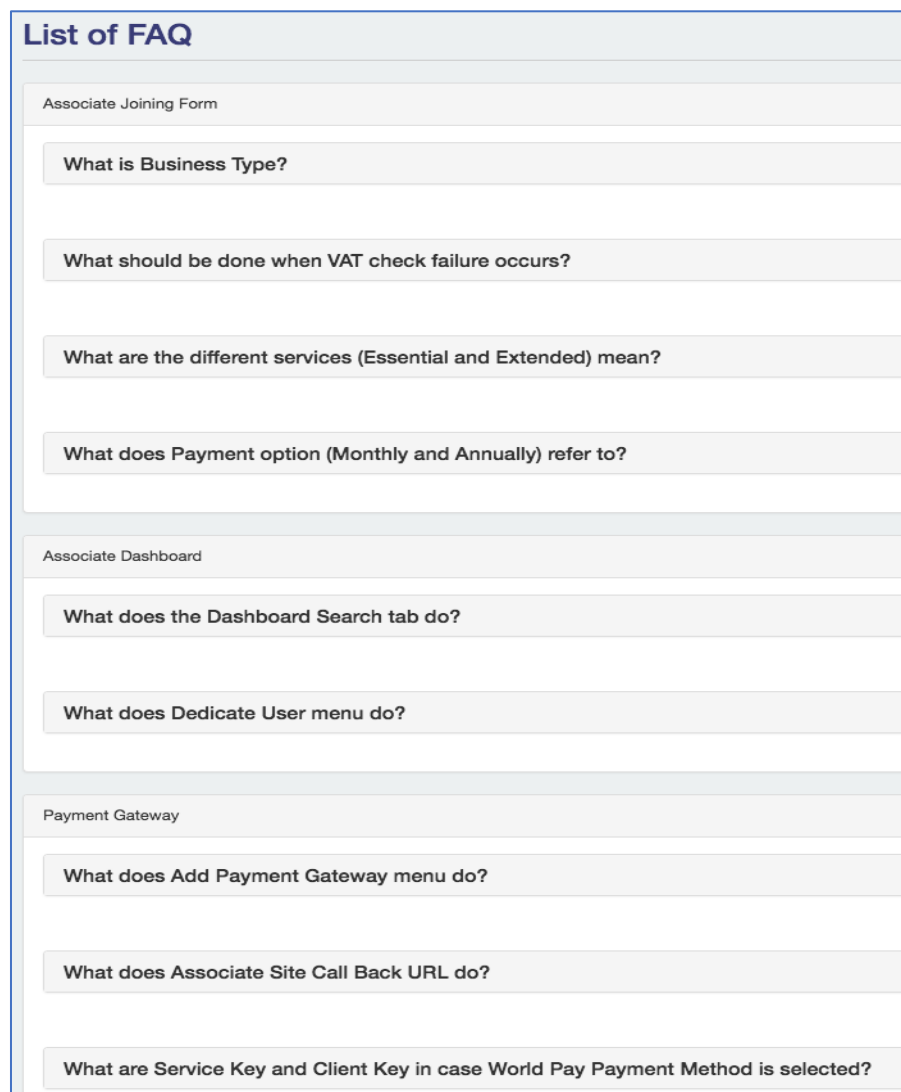


Fig. 4.8

Clicking on the Question tab will pop-up the Answer tab. This is shown in fig. 4.9.

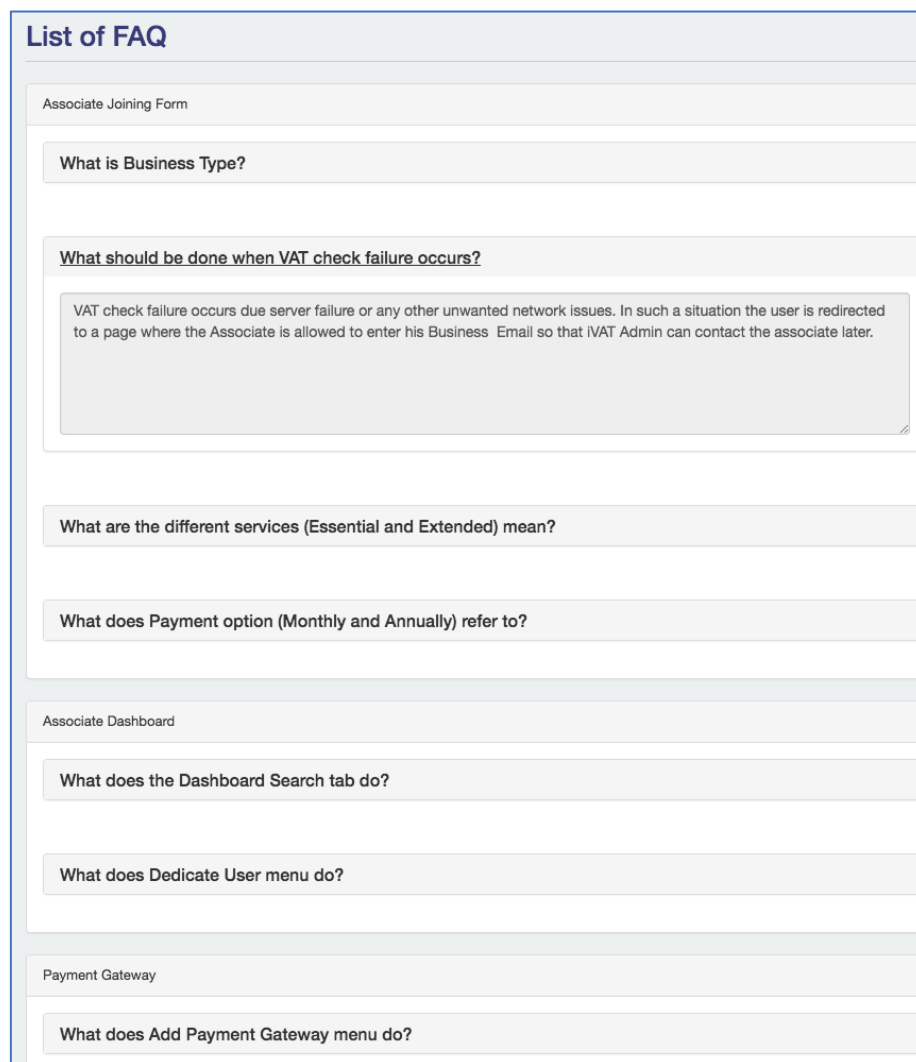


Fig. 4.9

## 35. [USER MANUAL](#)

The User Manual menu gives the link that redirects the Associate to the User Manuals page where it can be viewed and also can be downloaded for future reference.

## 36. [REPORTS](#)

The Associate can view and download different reports from the **Report** menu. Presently two different reports are available in the iVAT Application.

These are:

- Transaction Summary Report
- VATMOSS Report

*Note: vatmate | essential subscribers can only see/download VATMOSS reports in PDF format. vatmate | extend subscribers can see/download VATMOSS reports in PDF, CSV and XLSX formats.*

The **Reports** menu along with its submenu is shown in fig. 5.0

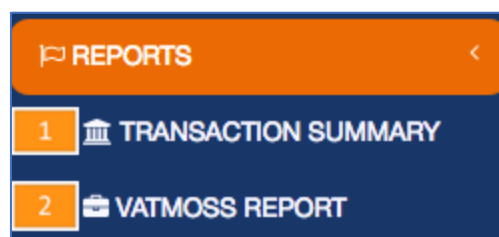


Fig. 5.0

### 37. TRANSACTION SUMMARY REPORT

The **Transaction Summary** Report shows all the sales record of your E-Commerce website within a date range that you specify.

The Transaction Summary Report generation page is shown in fig. 5.1.

A screenshot of the 'Transaction Summary' report generation page. The page has a light blue header with the title 'Transaction Summary'. Below the header, there is a form with two date input fields: 'Start Date' and 'End Date', both containing the value '2017-09-05'. To the right of each date field is an orange box with a number (1 for Start Date, 2 for End Date). Below the date fields, there are three radio buttons for the report format: 'CSV', 'XLSX', and 'PDF'. The 'PDF' option is selected, indicated by a blue dot. To the right of the radio buttons is an orange box with the number 3. At the bottom of the form, there are two buttons: 'GENERATE REPORT' (blue) and 'RESET' (blue). To the left of the 'GENERATE REPORT' button is an orange box with the number 4, and to the right of the 'RESET' button is an orange box with the number 5.

Fig. 5.1

#### 1. Start Date

Select the Starting date when the you wishes to view the report from on the **Start Date** tab.

#### 2. End Date

A VAT MOSS or MOSS report gives the record of the sales transaction of all the digital services through Associate's (your) website. It gives a complete report

sorted with the country Associate (you)sale and the tax that needs to be paid to that country.

The VAT MOSS report page is shown in fig. 5.3.

**VATMOSS**

VATMOSS

**Start Date**

2017-08-31

**End Date**

2017-08-31

☒ CSV ☐ PDF ☐ XLSX

**GENERATE REPORT** **RESET**

Fig. 5.3

**1. Start Date**

Select the start date from when you wish to view the report on the **Start Date** tab.

**2. End Date**

Select the end date from when you require the report to end on the **End Date** tab.

**3. Report Format**

Select the desired format **NB: CSV and XLSX are only available to vatmate | extend subscribers**

**4. Generate Report**

Clicking the [Generate Report] button will open a new tab or a pop up depending on your browser settings and generate the Transaction Summary report within the date range that was selected above.

**5. Reset**

The [Reset] button will reset the dates that has been set in the above fields.

The transaction summary report is shown in figure 5.4

VAT MOSS report coming soon

Fig. 5.4

### 39. [TICKET](#)

The **Ticket** menu allows you to raise any concern to the **vatmate**® Administration team whenever there is a problem using the **vatmate**® Application. This concern may include any technical hurdle or any technical issue with the application. The Ticketing system can also be used as a review system of the **vatmate**® application where the Associate can give comments on how to make the application more advanced or any changes the Associate would like to have in the application.

The Ticket menu along with its submenus is shown in fig. 5.5.

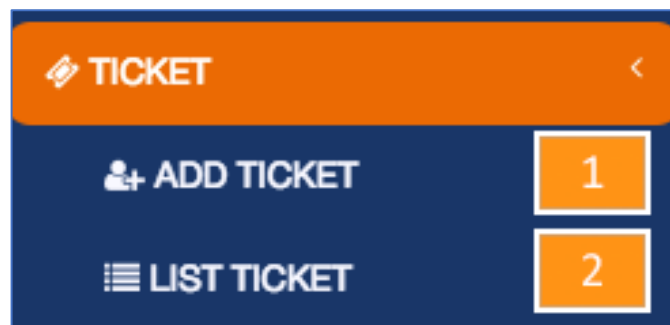


Fig. 5.5

### 40. [ADD TICKET](#)

The **Add Ticket** menu allows you to raise the ticket to **vatmate**® Administration.

The Add Ticket page is shown in fig. 5.6.

The screenshot shows a web form titled "ADD TICKET". Inside the form, there is a sub-header "ADD TICKET". Below this, there are four rows of input fields: "Ticket Type", "Category", "Priority", and "Subject". Each of the first three rows has a dropdown menu currently showing "--SELECT--". The "Subject" row has a text input field with the placeholder text "Subject". At the bottom of the form, there are two buttons labeled "SUBMIT" and "RESET", and a small box containing the number "6". Numbered callouts (1-6) are placed around the form: 1 points to the "Ticket Type" label, 2 to the "Category" label, 3 to the "Priority" label, 4 to the "Subject" label, 5 to the "SUBMIT" button, and 6 to the small box with the number "6".

Fig. 5.6

### 1. **Ticket Type**

The different types of tickets that are available at this moment are:

- Incident
- Problem
- Request

Please select the type of ticket that is being raised.

### 2. **Category**

The Category of ticket defines the area of the application to which the ticket is related to. The different categories of tickets that are available at this moment are:

- Administration
- Application
- Payment

Please select the category of ticket that is being raised.

### 3. **Priority**

The Category of ticket defines the priority of the ticket. The different priorities of tickets that are available at this moment are:

- Low
- Medium
- High

Please select the category of ticket that is being raised.

### 4. **Subject**

Please enter the subject or the concern for which the ticket is being raised, in detail in this field.



## 5. [Submit]

Clicking the [Submit] button will take you to **View Ticket** page.  
The View Ticket page is shown in fig. 5.7.

## 6. [Reset]

Clicking the [Reset] button will clear all the entries that are made in points 1, 2, 3, 4.

# 41. VIEW TICKET

The View Ticket page shows all the details about the ticket that is raised

The screenshot shows the 'View Ticket' page. On the left, there are input fields for ticket details: TICKET ID (1), TICKET TYPE (REQUEST), CATEGORY (PAYMENT), PRIORITY (LOW), SUBJECT (Future Payment Gateway activation), CREATED ON (2017-08-31), CREATED BY (boss@...), CHANGED ON (2017-08-31), CHANGED BY (boss@...), STATUS (O), and MESSAGE BODY (with a text area and a small '1' icon). At the bottom left, there are buttons for '2', 'ADD', and 'BACK TO LIST OF TICKET'. On the right, there is a 'MESSAGE' section with a table showing message history. The table has columns: created\_by, message, DATE, CREATED BY, and Action. It contains two rows of messages. The first row has a message 'We will co' and the second row has 'Please adv'. Both rows have an 'Action' column with an eye icon. A small '3' icon is visible at the bottom right of the message table.

created_by	message	DATE	CREATED BY	Action
	We will co	31-08-2017 16:03:01	gareth.davies@lvtat.uk	View
	Please adv	31-08-2017 15:59:13	boss@...com	View

Fig. 5.7

## 1. Message Body

Please enter any details about the ticket.

## 2. Add

Clicking the [Add] button will add the message to the Message column on the right side of the page as shown in fig. 5.7. This Message column serves as a panel where the Associate can discuss about the ticket with the Admin.

## 3. View

Clicking the 'Eye shaped' [View] button will bring will bring a pop-up message box which will display the contents of the message.  
This is shown in fig. 5.8.

The screenshot shows a pop-up message box titled 'Message Description'. It contains the text: 'We will confirm our dates with our partners and email you in the next week'. At the bottom right, there is a 'Close' button.

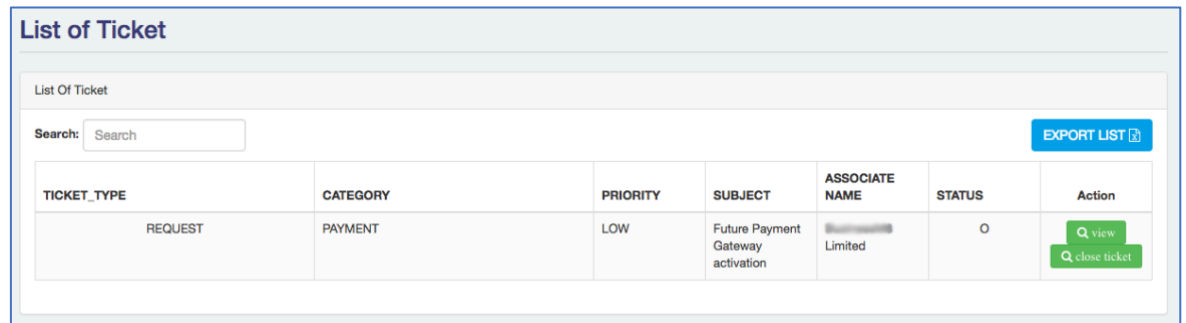
Fig. 5.8

## 42. LIST TICKET

This menu allows you to view the list of tickets that has been raised by the Associate user account that is logged in.

The Associate can close a particular ticket by clicking the [**Close Ticket**] button in the Action column corresponding to the ticket that is being closed.

The **List Ticket** page is shown in fig. 5.9



The screenshot shows a web interface titled "List of Ticket". Below the title is a search bar with the placeholder text "Search" and a blue "EXPORT LIST" button. The main content is a table with the following columns: TICKET\_TYPE, CATEGORY, PRIORITY, SUBJECT, ASSOCIATE NAME, STATUS, and Action. A single row of data is visible, representing a ticket with the following details: TICKET\_TYPE is REQUEST, CATEGORY is PAYMENT, PRIORITY is LOW, SUBJECT is Future Payment Gateway activation, ASSOCIATE NAME is [redacted] Limited, and STATUS is O. In the Action column for this row, there are two green buttons: "view" and "close ticket".

TICKET_TYPE	CATEGORY	PRIORITY	SUBJECT	ASSOCIATE NAME	STATUS	Action
REQUEST	PAYMENT	LOW	Future Payment Gateway activation	[redacted] Limited	O	<a href="#">view</a> <a href="#">close ticket</a>

Fig.5.9

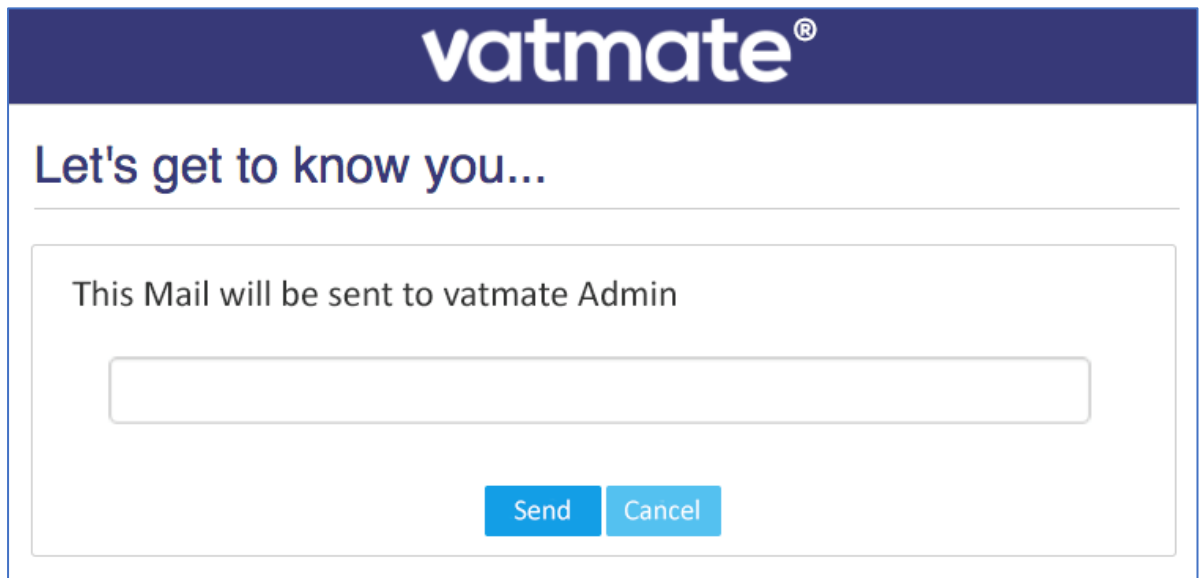
## 43. ADDITIONAL SECTION

## 44. VAT CHECK FAILURE

There can be instances where a new Associate may not be able to join **vatmate**® because of the VAT check failure occurring due to an error or failure external to your or our control.

In this case the Associate will be redirected to a page where the Associate will be able to enter his Contact EMail so that **vatmate**® Administration can contact you later.

This page is shown in fig. 6.0



The screenshot shows a web form with a dark blue header containing the 'vatmate' logo. Below the header, the text 'Let's get to know you...' is displayed. A light gray box contains the instruction 'This Mail will be sent to vatmate Admin' above a single-line text input field. At the bottom of this box are two blue buttons labeled 'Send' and 'Cancel'.

Fig. 6.0

Enter the contact eMail id in the blank field and click [**Send**] button.

This will send the Associate's contact eMail to the **vatmate**® Administration.

#### 45. [PAYMENT FAILURE](#)

#### 46. [PAYMENT FAILURE WHILE JOINING](#)

In case the Associate payment fails while joining due to some internet or web browser related issues (like the web browser closes abruptly while in the Payment Gateway page or Server Issue, etc.) then the Associate gets a Re-Payment mail for the next 7 days which contains a link to pay iVAT International.

Clicking on this link will redirect to a similar page as shown in fig. 1.4 but the following fields will be non-editable:

- Associate's Business Name
- Choose **vatmate**® Product
- Payment Type

Select the appropriate Payment Method and then follow steps **5, 6, 7, 9** from section **6.3**.

#### 47. PAYMENT FAILURE WHILE PAYING THE MONTHLY SUBSCRIPTION FEE


Should a monthly payment for your subscription fee to iVAT Limited fail due to some internet or web browser related issues (like the web browser closes abruptly while in the Payment Gateway page etc.) then the Associate should log into the account follow steps mentioned in section. 8.4.2

In case the Associate has failed to pay iVAT Limited after 28 days of the subscription end date in the Associate will have to contact the **vatmate**® Administration for further assistance.

#### 48. FORGOT PASSWORD

There can be instances where one of your Users forget their password but remembers the Security Questions that were set during Account creation.

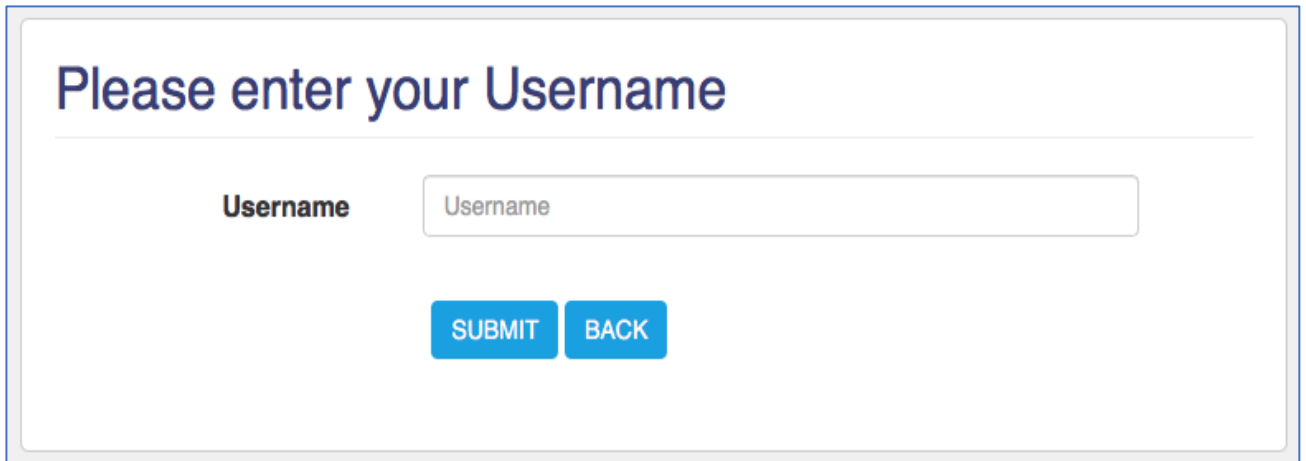
In this case the user should click the Forgot Password button in the **vatmate**® Sign In page. As shown in fig. 6.1.



The image shows a web form for signing in to the vatmate system. At the top is a dark blue header with the 'vatmate' logo in white. Below the header is a white rectangular box with a blue border. Inside this box, the text 'SIGN IN' is displayed in blue. Below this text are two input fields: 'Username' and 'Password'. Under the 'Password' field is a checkbox labeled 'Remember me'. Below the checkbox is a blue button with the text 'SIGN IN' in white. At the bottom of the white box is a link that says 'Forgot Password?' in blue.

Fig. 6.1

Clicking the **Forgot Password?** button will navigate the User to the page shown in fig. 6.2.

A web form titled "Please enter your Username" in a large, dark blue font. Below the title is a horizontal line. Underneath the line, the word "Username" is displayed in bold. To the right of the label is a text input field with the placeholder text "Username". Below the input field are two blue buttons: "SUBMIT" and "BACK".

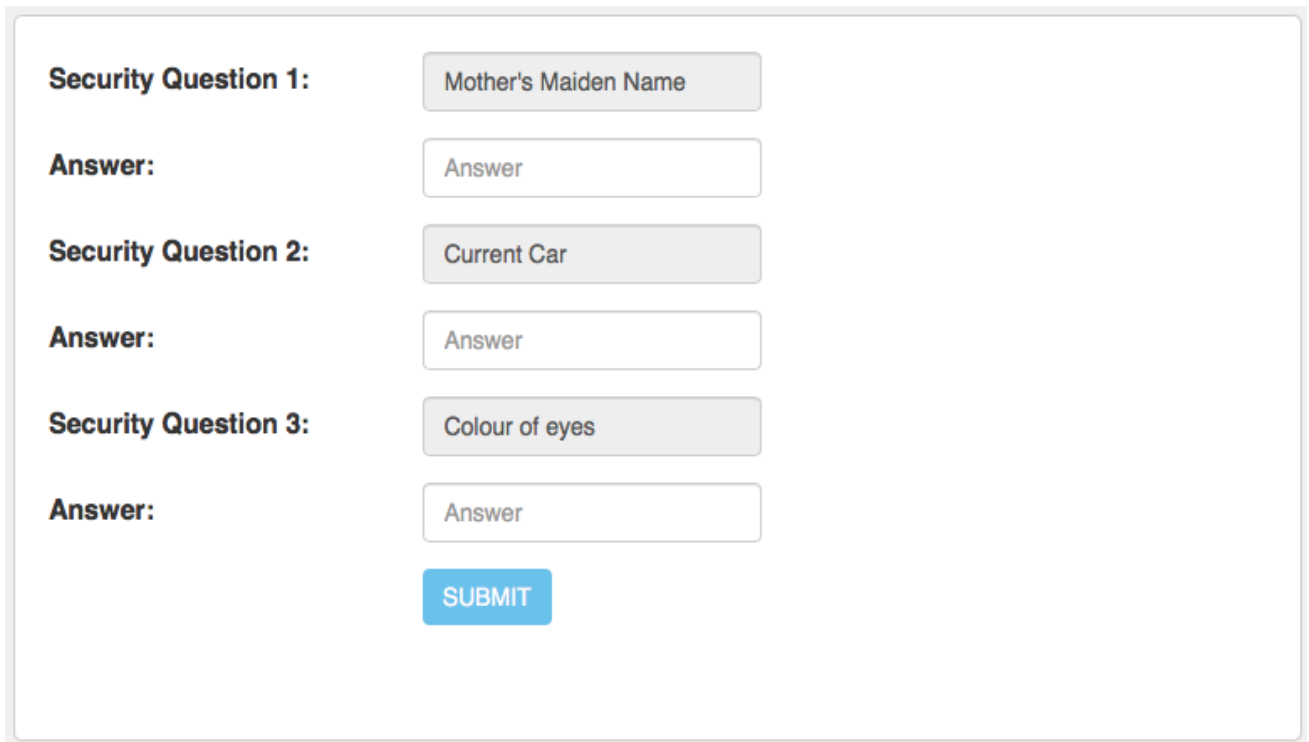
Please enter your Username

Username

Fig. 6.2

Please enter the User Name whose password needs to be reset.

Clicking the [Submit] button will redirect the User to the Security Answers page shown in Fig 6.3.

A web form titled "Security Questions" with three sections. Each section contains a question label, a grey button with the question text, an "Answer:" label, and a text input field with the placeholder "Answer". The questions are: "Security Question 1: Mother's Maiden Name", "Security Question 2: Current Car", and "Security Question 3: Colour of eyes". At the bottom of the form is a blue "SUBMIT" button.

**Security Question 1:**   
**Answer:**

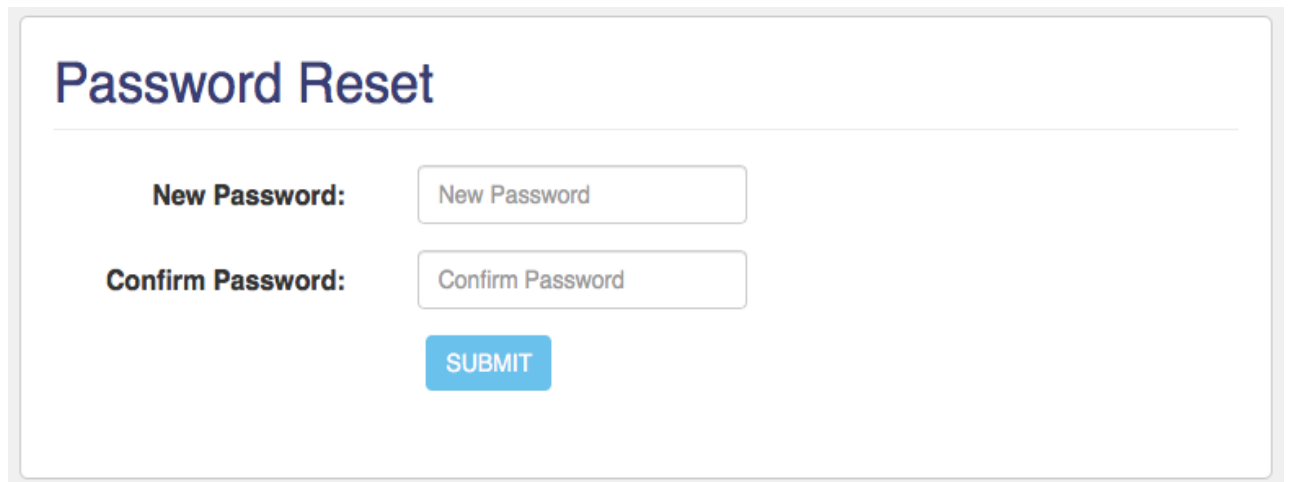
**Security Question 2:**   
**Answer:**

**Security Question 3:**   
**Answer:**

Fig 6.3

Enter the relevant security answers and click the [Submit] button.

This will take you to the Reset Password page as shown in Fig 6.4:

A screenshot of a web form titled "Password Reset" in a large, dark blue font. Below the title is a horizontal line. The form contains two input fields: "New Password:" and "Confirm Password:", each with a corresponding text box. Below these fields is a blue "SUBMIT" button.

## Password Reset

---

**New Password:**

**Confirm Password:**

**SUBMIT**

Fig 6.4

Now enter and confirm your new password, then click [SUBMIT]. Complete steps 1, 2 and 3 from Section 6.4 to reset your password.