



**How To Add
Insurance Entry**



DEEPAK AMARSHI VARIYA

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Online

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- 🏠 Dashboard
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- 📦 Items
- 🛒 Sales
- 🛒 Purchase
- 🏦 Auto Bank Reconciliation (ABR)

○ Company Law

Company Law

After Clicking On The Company Law You'll Get Many Options Like Form MBP-1, DIR-8 & Etc.

You Can Also Add
Insurance Entry From
Quick Generate Option As Well

August - 2023, Time 4:47:03 PM

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Disclosure

Form MBP 1

DIR 8

DIR 2

Notice, Agenda, Minutes, Attendance, Leave of
Absence and Acknowledgements

BOARD MEETING

ANNUAL GENERAL MEETING

EXTRA ORDINARY GENERAL MEETING

COMMITTEE MEETING

Step 1

To Add Insurance Entry
You've To "Select"
the same Tab in Contract Section

Direct

List of Director

Auditor

Auditor Appointment

Auditor Resignation

Share Transfer

Share Transfer Deed

Share Certificates

Equity Share

Preference Share

Debenture Share

Resolution

CTC Resolution

Contract Agreement

Registration

Insurance

Agreement

Contract

Audit & Due Diligence

Secretarial Audit (MR-3)

Statutory Registers



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Reconciliation (ABR)
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-  Robot
-  Human Resource
-  Activities

Company Law

Tuesday 22nd August - 2023, Time: 6:31:26 PM

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01/08/2023 - 31/08/2023

Select Company

Step 2

**NOW “CLICK” ON THE
+ BUTTON SHOWING YOU
IN THE DIAGRAM**

You can also add data by Importing Excel Sheet



Export

Delete

Import

Common Search...

☐	Sr No.	Action	Company Name	Name of Insurance Broker/A...	Sum Insured	Policy Com...	Start From	Name of Insurance Company	Policy Type	Policy Num...
☐	1		ANUPALAN LIMITED	LIC OF INDIA	1000000	22-08-2023	22-08-2023	UDEC ERGO General Insurance ...	Property Insurance	L25SS52236
Total Records : 1										

Step 3

Now Fill the Mandatory Fields
& Submit The Form By "clicking"
Submit Button

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- Company Law
- Robot
- Human Resource
- Activities

Company Law

Insurance Add Insurance

Company Name *
Select 

Name of Insurance Broker/Agent *

Sum Insured (In Rs.) *

Policy Commencement Date *
You Just Have To pick a date from the calender It'll Automatic reflect in the column 

Start From *


Asset Insured *

Payment Date *


Key Terms *

Alert User *
Select

Attachement
Click Here To Upload The Attachment File
Drag files to upload (or click) 

Name of Insurance Company *
Select 

Policy Type *
Select 

Policy Number *

Policy/Renewal Date *

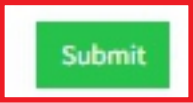
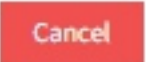

Expiry Date *


Amount Paid (In Rs.) *

Mode of Payment *

Alert Before *
Select 

Remarks

After Completing The Form Press On Submit Button  



DEEPAK AMARSHI VARIYA

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 [Dashboard](#)

Download Section

Organization

 Customer

Company

Tasks

 Digital Signature

④ Expense

Items

Sales

 Purchase

 Auto Bank
Reconciliation (ABR)

○ Company Law

 Robot

 Human Resource

12 Activities

Company Law

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01/08/2023 - 31/08/2023

Select Company

Registration

Insurance

Agreement

Contract

Common Search...

	Sr No.	Action	Company Name	Name of Insurance Broker/A...	Sum Insured	Policy Com...	Start From	Name of Insurance Company	Policy Type	Policy Num
☐	1		ANUPALAN LIMITED	LIC OF INDIA	1000000	22-08-2023	22-08-2043	HDFC ERGO General Insurance ...	Property Insurance	LC25SS522360
You will Also Get Many Option Here Edit, Delete & View										
Total Records : 1										
1-1										



DEEPAK AMARSHI VARIYA

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 Dashboard Download Section

Organization

 Customer

Company

Tasks

 Digital Signature

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Items

Sales

 Purchase

 Auto Bank
Reconciliation (ABR)

○ Company Law

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 Human Resource

12 Activities

Company Law

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ANUPALAN LIMITED

Company Details	
Calendar	
Comments	
Attachment	
Tasks	109
Timesheet	
Invoice	1
Debit Note (Billable Exp.)	49
Payments	39
Credit Note	
Estimates	1
Expense	53
List of Directors	4
List of Shareholders	7
Ledger Confirmation	24
Registered Address	

Company Law

Disclosure	
Form MBP 1	5
DIR 8	5
DIR 2	

Auditor
Auditor Appointment
Auditor Resignation

Notice, Agenda, Minutes, Attendance, Leave of Absence and Acknowledgements	
Minutes of Meeting	25

Contract Agreement	
Registration	1
Insurance	1
Agreement	1
Contract	1

Share Certificates	
Equity Share	2
Preference Share	1
Debenture Share	1

Share Transfer

Share Transfer Deed

Resolution
CTC Resolution 1

**These Documents Will Be Available Here As Well
And At Listing Of Contract Agreement / Insurance As Well**

Step 4

Now You've Successfully add Payment Mode

Statutory Registers			
Members	2	Deposits	Loan & Guarantee
Debenture Holders		Directors & KMP	Fixed Asset Register

Now You've Successfully add Payment Mode

Great.. You've Successfully Completed The Session See You In Next Slide..

Insurance

Great.. You've Successfully Completed The Session See You In Next Slide..

Show 10 entries

Excel

Search:

Name of Insurance Broker/Agent	Sum Insured	Policy Commencement Date	Start From	Name of Insurance Company	Policy Type	Policy Number	Policy/Renewal Date
HDFC ERGO							