e-Docs Training

Notes

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How to Register on eDocs

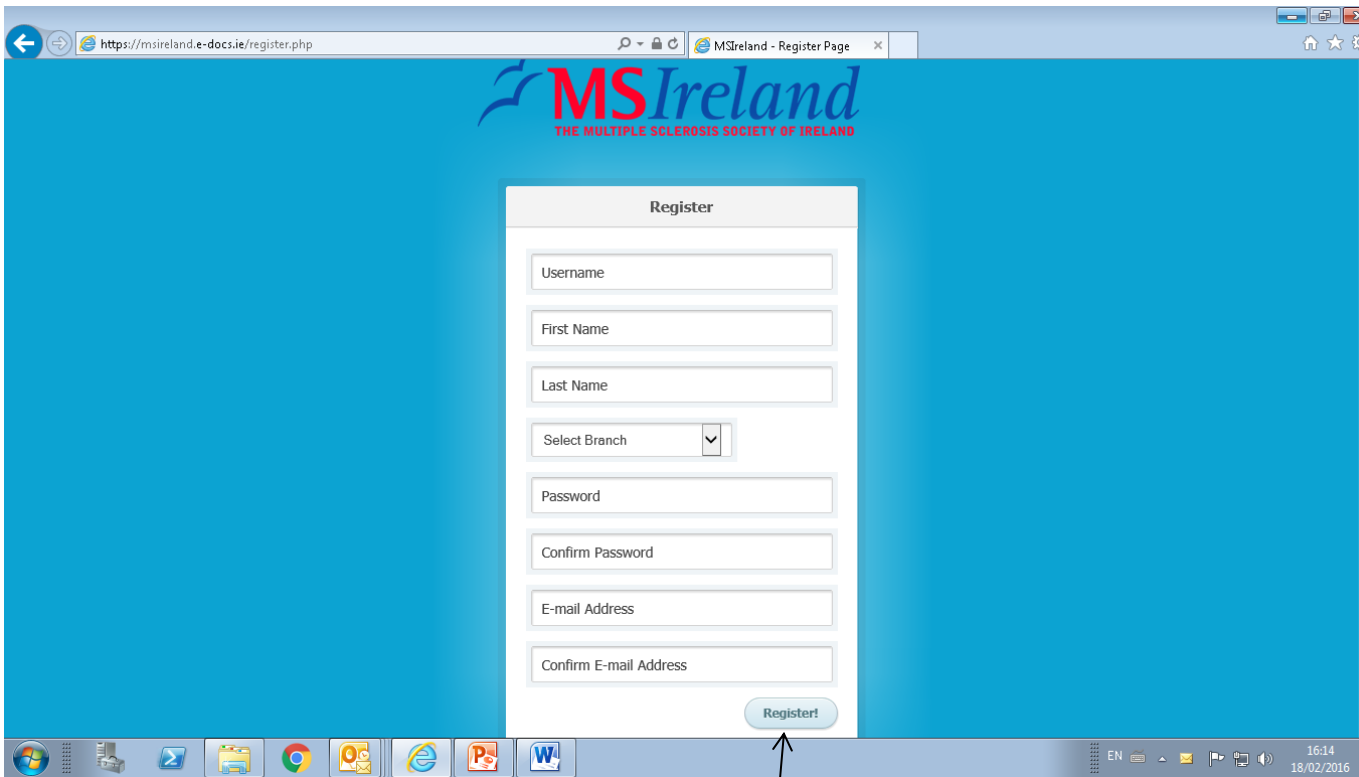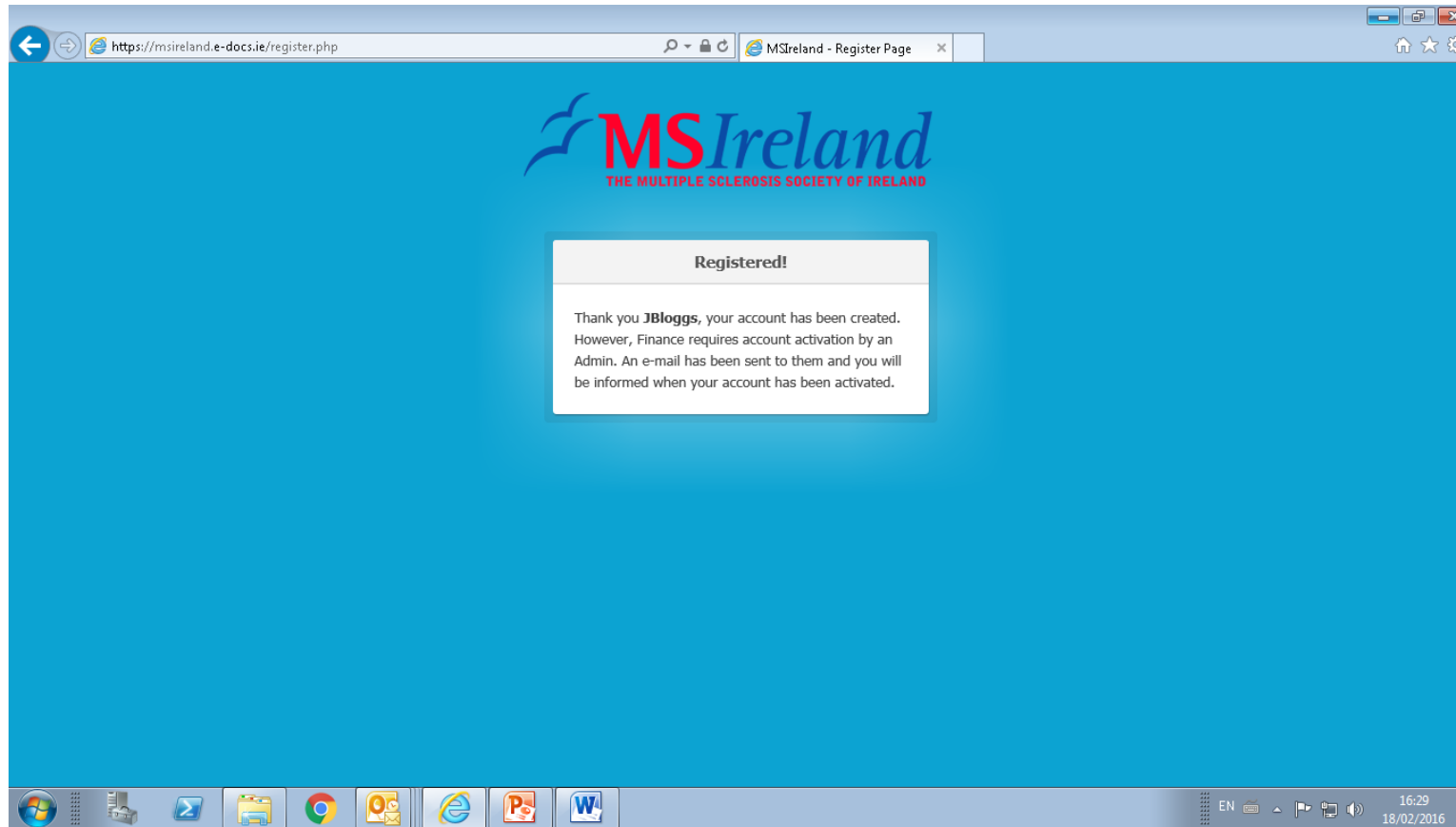Go to https://msireland.edocs365.com/ and click Sign-Up!

To Register on e-Docs type :

1. Username of your choice (max 15 characters)
2. First name
3. Last name
4. Select Branch from drop down list
5. Password of your choice and confirmation of password (min 8 characters)
6. E-mail address and confirmation of e-mail

Click Register

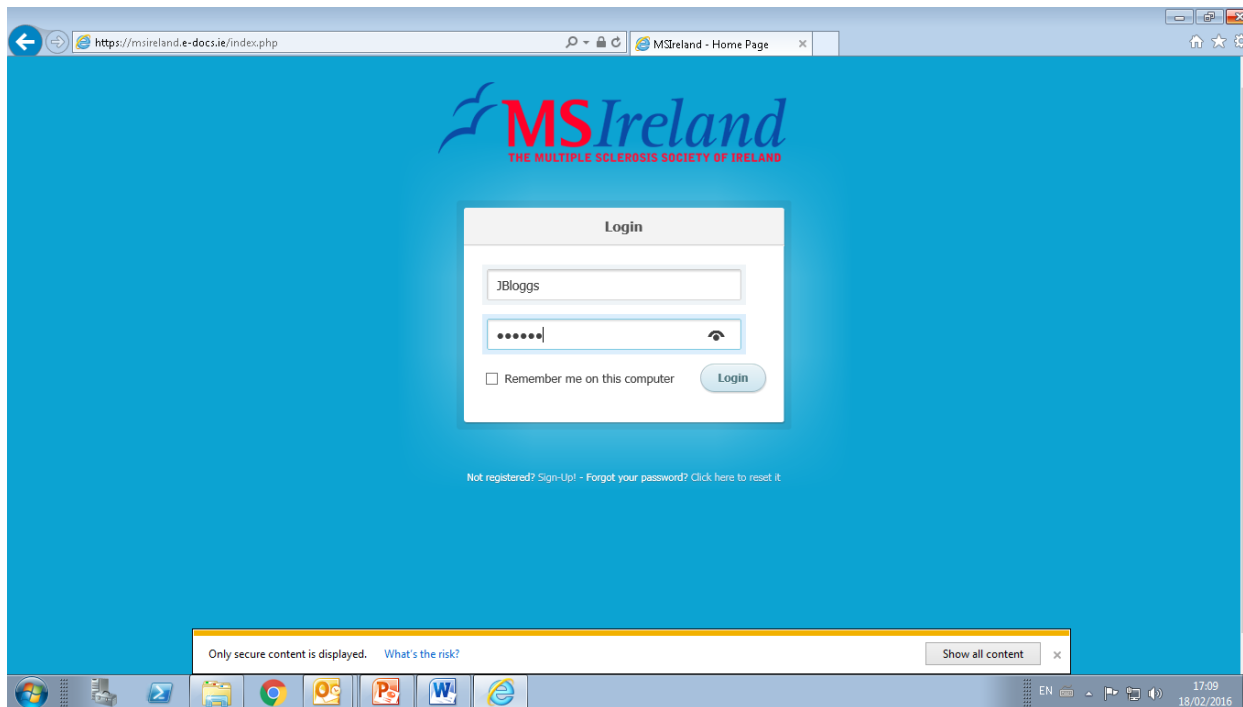When you register you will see the message below

After you register Finance Department must activate your account on e-Docs to enable your Logon

You will receive an e-mail when your account is activated

To Logon to e-Docs

Enter Username and Password

Home Screen after Logon

Access is limited to your own specific Branch e.g. Laois

https://msireland.e-docs.ie/secure/report.php

eDocs v1.3

MSIreland
THE MULTIPLE SCLEROSIS SOCIETY OF IRELAND

€   Report

By Category | Laois | 2015 | All Months | **Filter report**

Income / /	
Description	**Value**
	Total €0.00

Expenses / /	
Description	**Value**
	Total €0.00

Deficit / Surplus	
Total Deficit	**€0.00**

17:12
18/02/2016

To enter Income/Expenditure hover mouse over Euro € symbol icon

Hover mouse over €

To enter Income items click Income Icon

Select Income by clicking

Screen below is the Income screen

Click plus symbol + to add information

Click +

Add Record will be displayed

Branch is already populated with your own Branch, the following fields must be populated:

1. Date by clicking calendar icon
2. Income Category from drop down list
3. Amount
4. Donor Name
5. Lodgement number
6. Lodgement cleared (yes/no from drop down list)

Other Description and Notes are optional however items 1- 6 above are mandatory* fields

When 6 Mandatory Fields are populated click **submit** and record will be added

Click Submit

Transaction added

To move to Expense Screen hover mouse over Euro Symbol €

Click Expense

Hover mouse over € Icon and then click Expense Icon

Screen below is the Expense screen

Click plus symbol + to add information
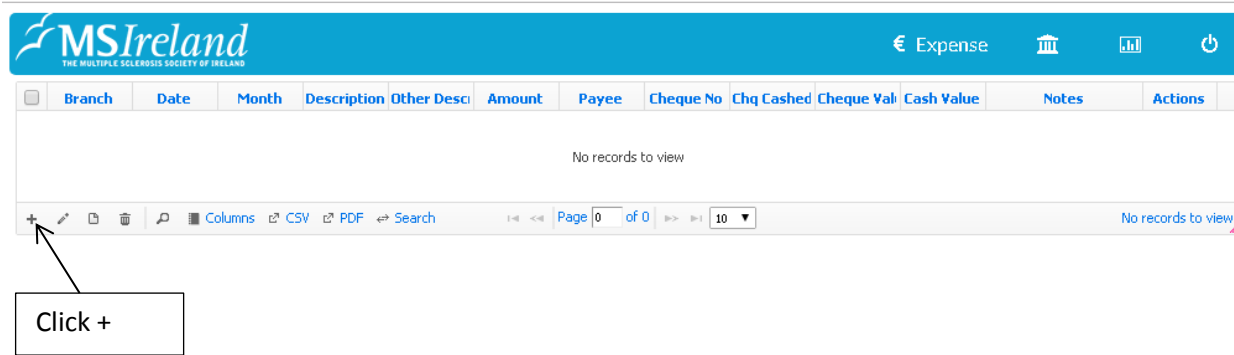
Click +

Add Record will be displayed

Branch is already populated with your own Branch, the following fields must be populated:

1. Date by clicking calendar icon
2. Expense Category from drop down list
3. Amount
4. Payee
5. Cheque number
6. Cheque cashed (yes/no from drop down)

Other Description and Notes are optional however items 1- 6 above are mandatory* fields

Click Submit

When 6 Mandatory Fields are populated as per below click submit and record will be added

Edit/Delete Income/Expense item

Record to be edited is highlighted in blue below,

Click Save icon or Cancel Save icon

Click pen icon to edit or bin icon to delete a record

After amendments are made click save icon (disk) or cancel save icon (circle with line) to exit

To View Reports or go back to Home page click Report Icon

Click Report icon

Report/Home page Screen

To run Income & Expenditure report select year, month and click Filter report

Select Year, month and click Filter Report

Example Income & Expenditure Report

Income Laois / 03 / 2015	
Description	Value
	Total €0.00

Expenses Laois / 03 / 2015	
Description	Value
Governance Costs	€186.00
Fundraising Expenses	€280.00
Running Expenses	€221.00
	Total €687.00

Deficit / Surplus	
Total Deficit	€-687.00

To Print Income & Expenditure Reports

Select by Category or By Description

Click Print this report

There is an option to run report by Category or by Description.

To Logout of e-Docs

Click Power icon

To logout Click Power icon

Troubleshooting

If you've forgotten your password – click here (icon) to reset it
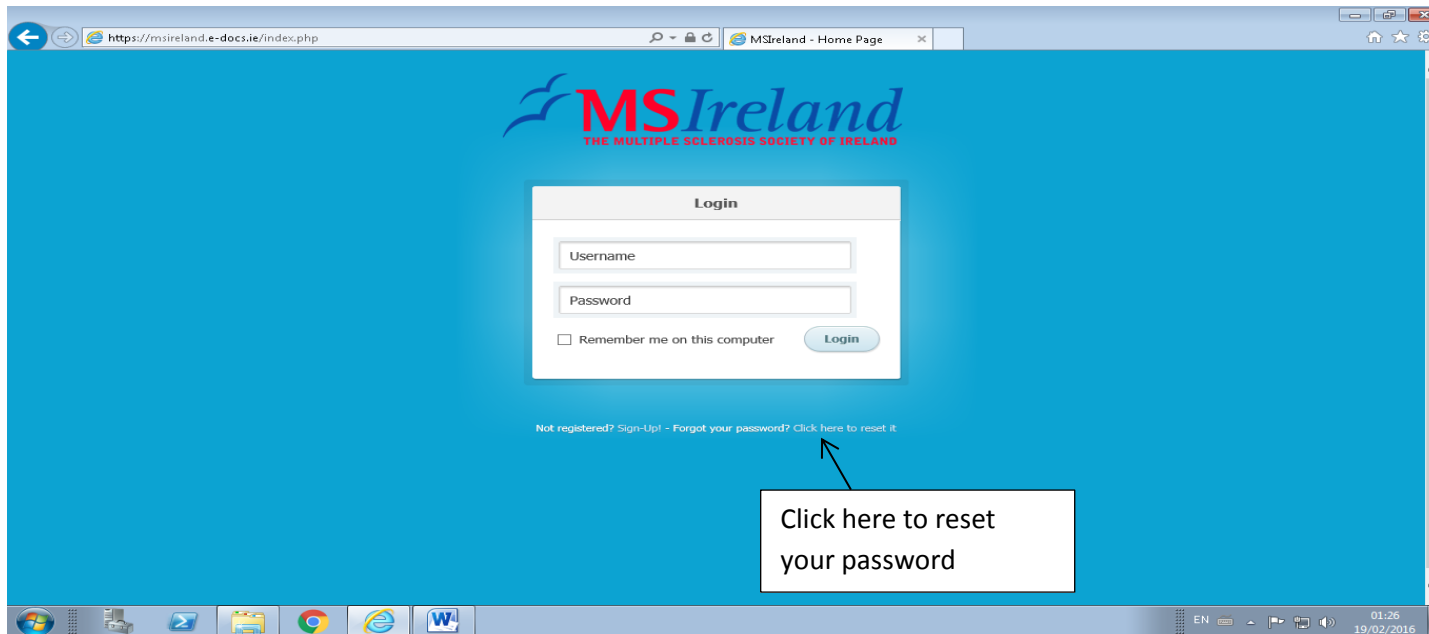
If you've forgotten your username – contact Finance Department to retrieve it

Please note that the Mullingar and Laois Branches are used as dummy Branches and used as example only. These are not true figures.