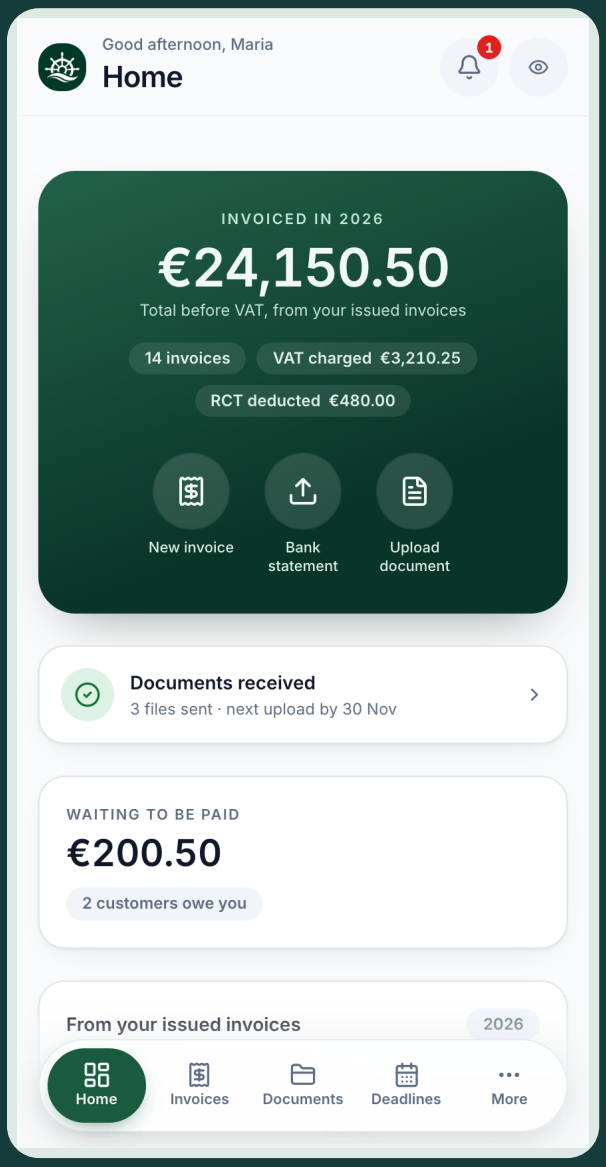
HELM

Your visual guide

Sole trader and self-employed

From signing in to uploading documents, with the screens you will see in the app.

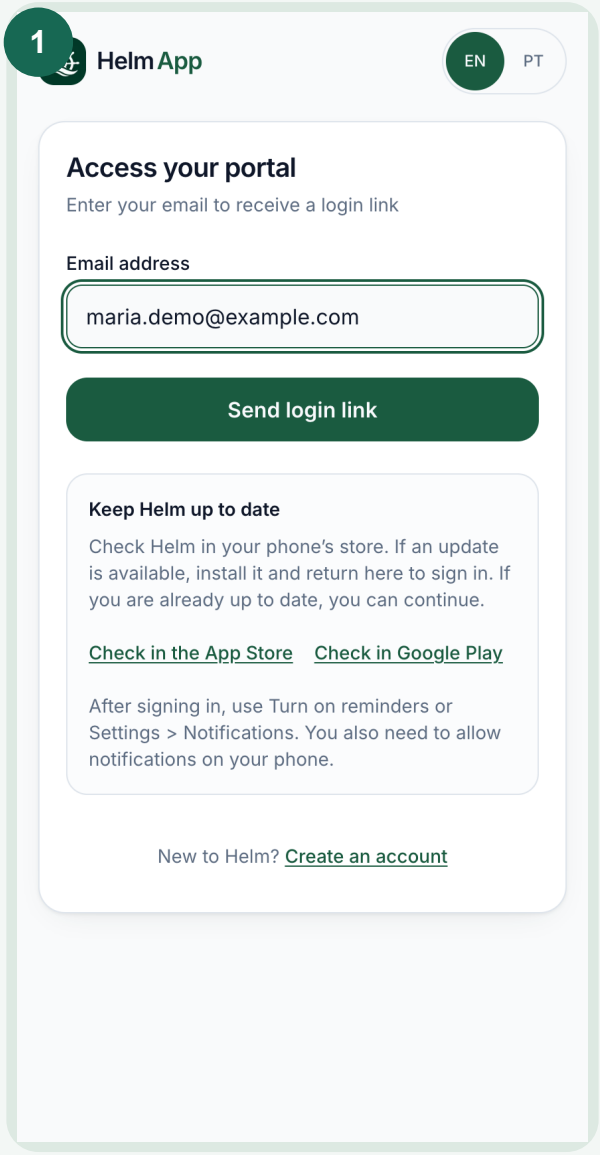


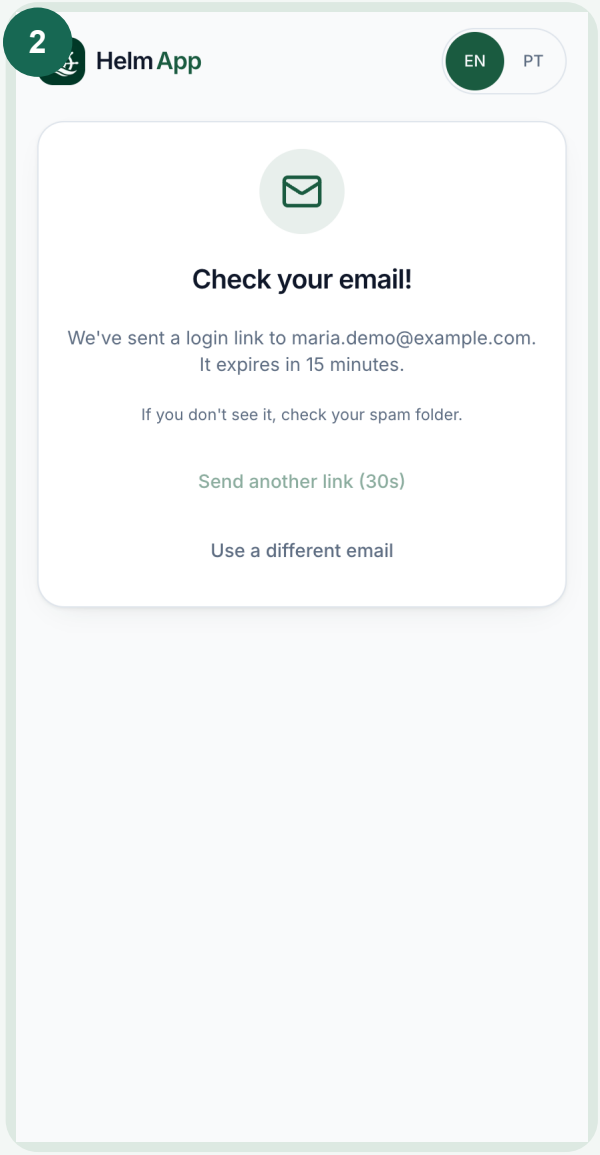
1. **Sign-in**
2. **Documents**
3. **Invoices**
4. **Deadlines and support**
5. **Settings**
6. **Capture**

Menus and permissions vary by account. Follow the flow shown in your app.

app.aran-accounting.ie

Sign in to your account





Request your sign-in link

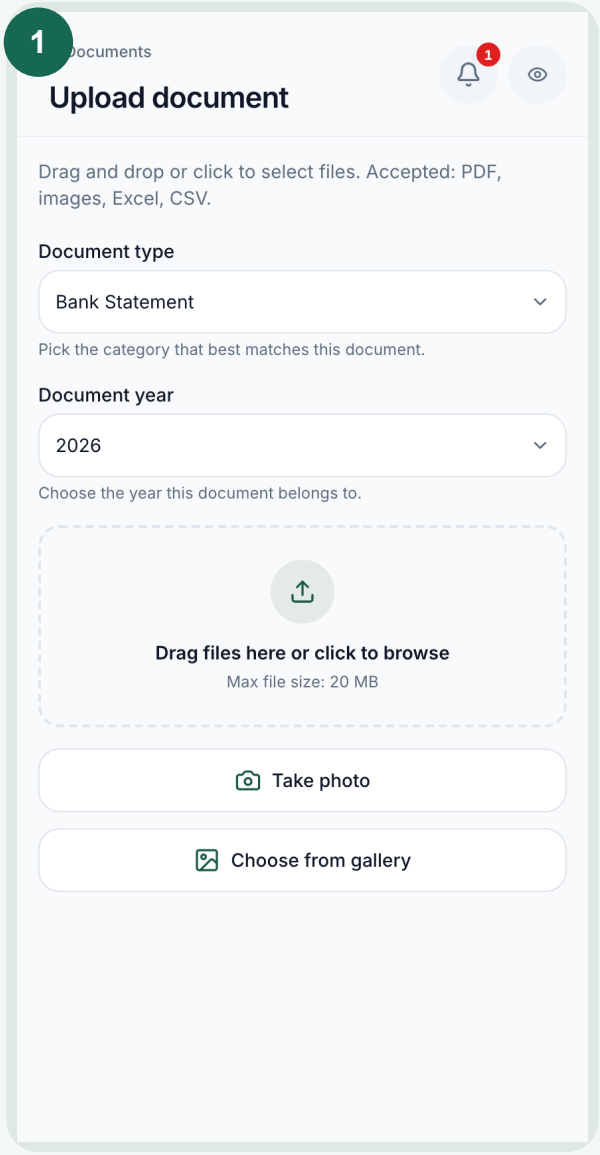
Enter the email address registered with ARAN, then select the button to receive your sign-in link. Check the address before submitting it. You do not need to create a password on this screen. In this demonstration the request is simulated and no real email is sent.

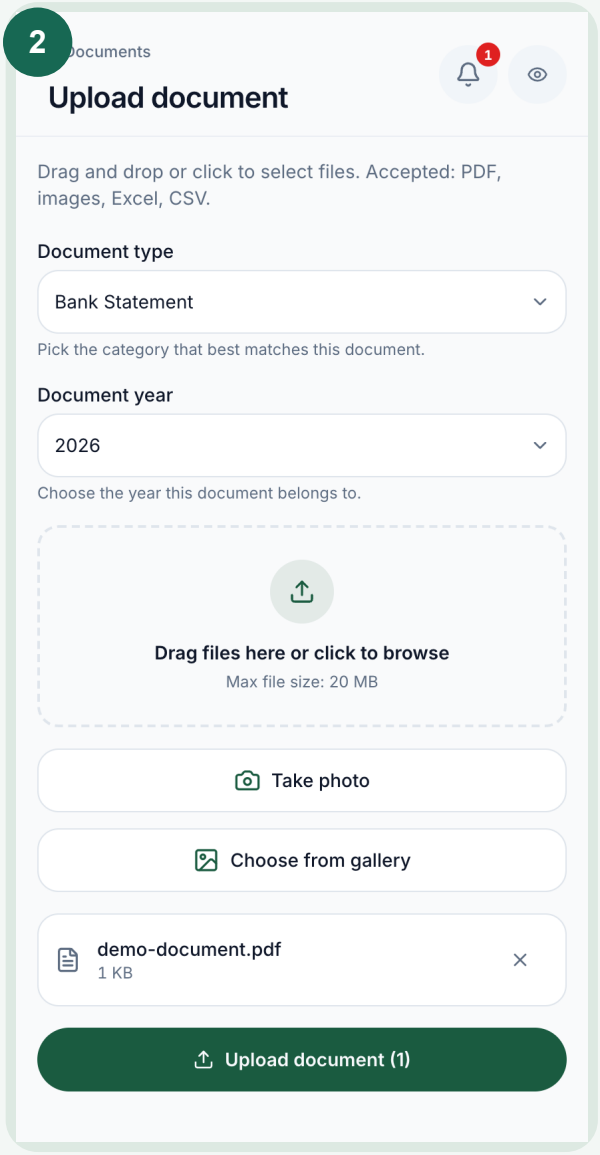
Open the email and sign in

Open your inbox and follow the Helm sign-in link. If it is missing, check your spam folder. Follow the expiry time shown on screen; this example shows fifteen minutes. Request a new link if it expires. Use the other-email option if you entered the wrong address.

Use your registered email. Request another link if it expires. You do not need to create a password on this screen.

Upload a document





Choose the category

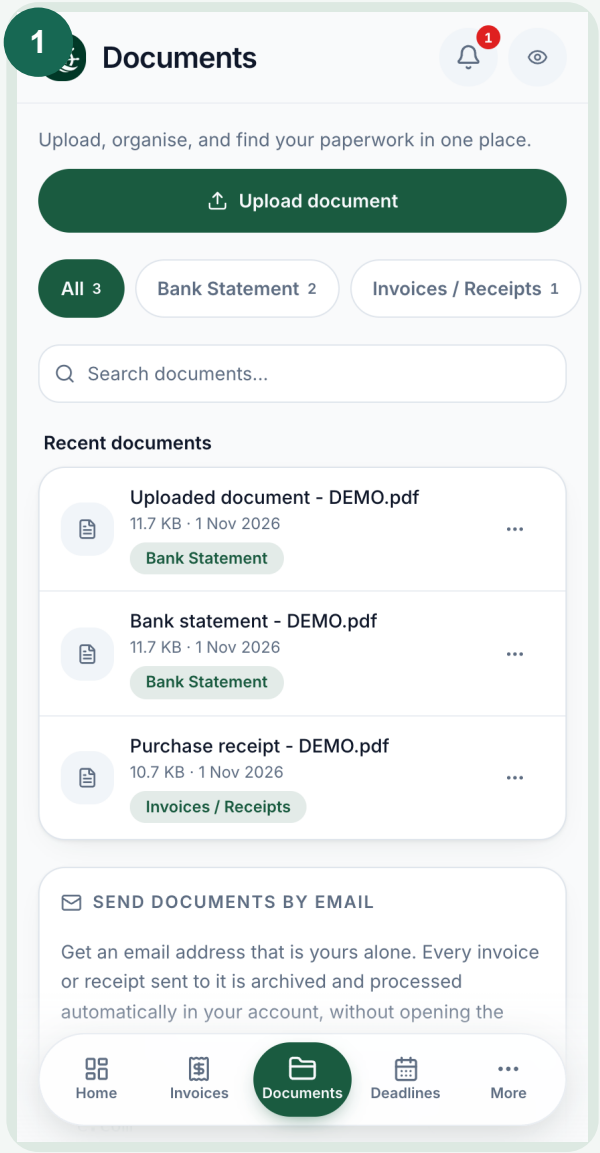
On the upload screen, choose the correct document type. For a bank statement, choose Bank Statement. For a purchase, use the relevant invoice or receipt category. Check the selection before attaching your file. This helps your accountant find and handle the document correctly.

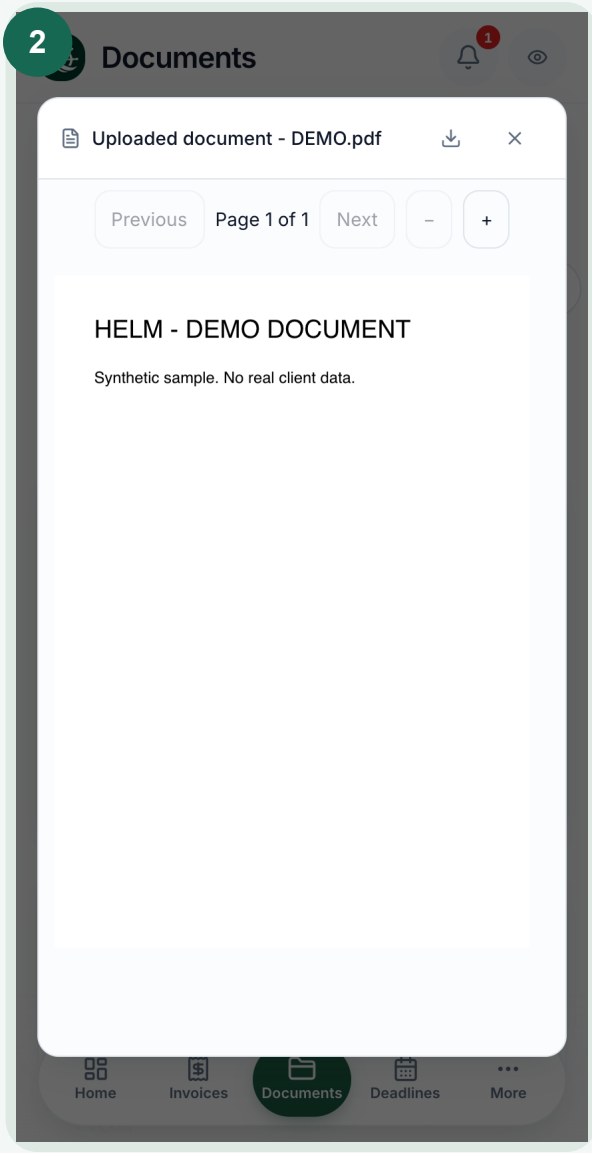
Attach and check

Choose a file from your phone or computer. When a photo option is available, keep all document edges visible and make sure the text is readable. Check the filename in the queue. Remove any incorrect selection before pressing Upload. Wait for the result before closing the screen.

Start in Documents > Upload document. Choose the category and check the files before confirming.

Check and open your files





Check the upload result

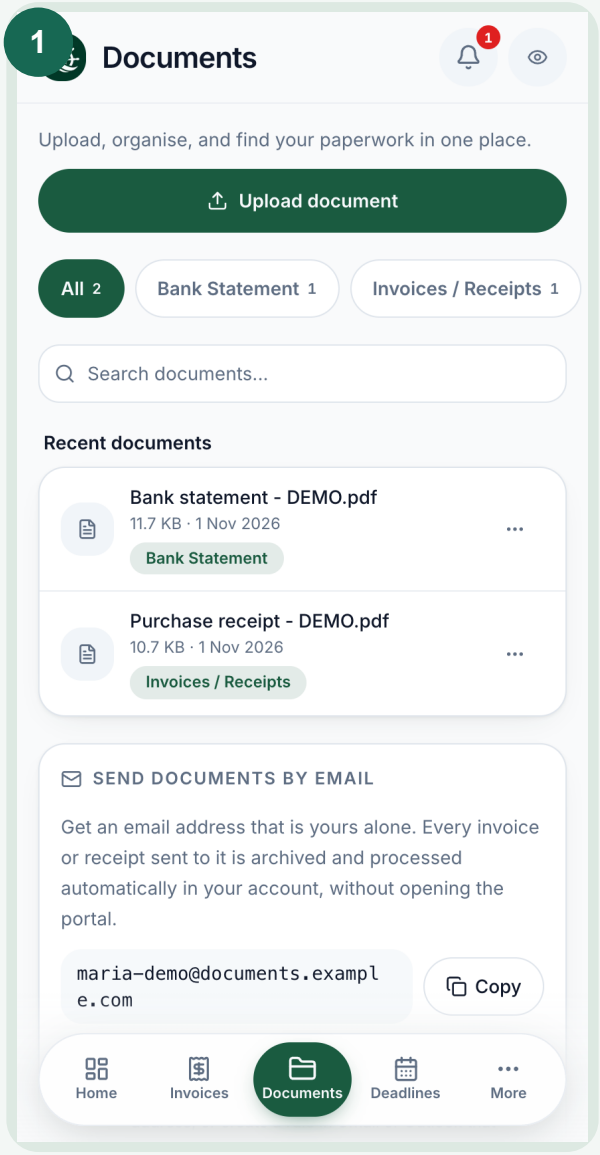
After uploading, check that the file appears in your document list. If a file fails, read the message and retry only the pending item. Do not repeat an entire batch when some files have already been sent. If the result remains unclear, contact your accountant through Support.

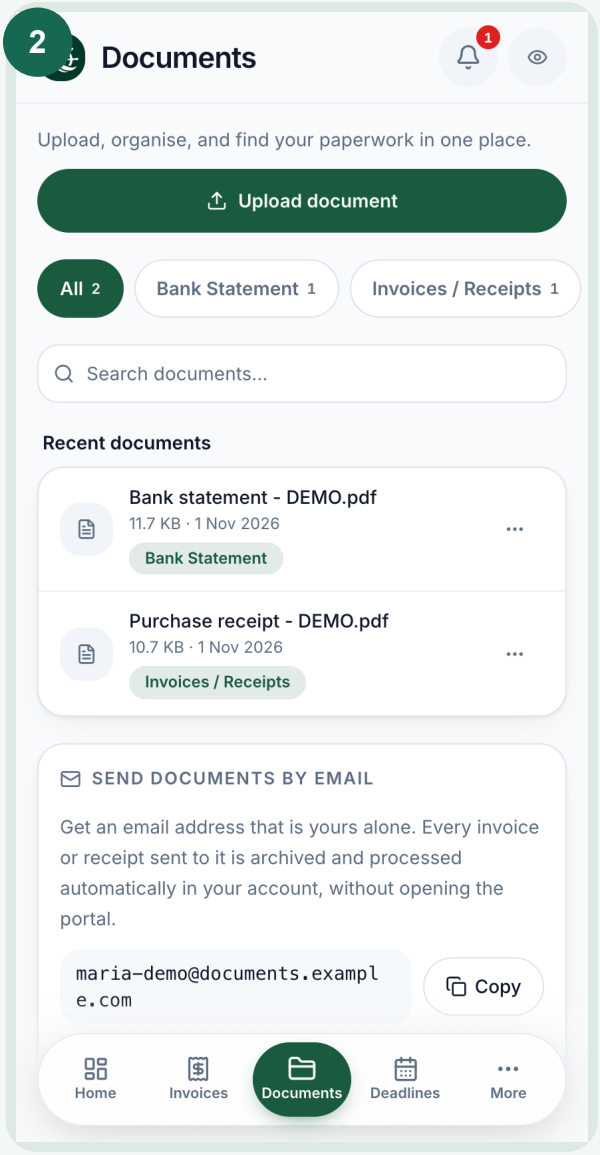
Preview and download

Select a document to open its preview. Check that the image or PDF is readable and complete. Use page and zoom controls when available. Choose Download to save a copy. Additional actions are in the three-dot menu. Check the selected file carefully before confirming a deletion.

A completed upload does not mean the accounting review is finished. Follow the document status.

Organise your documents





Find your documents

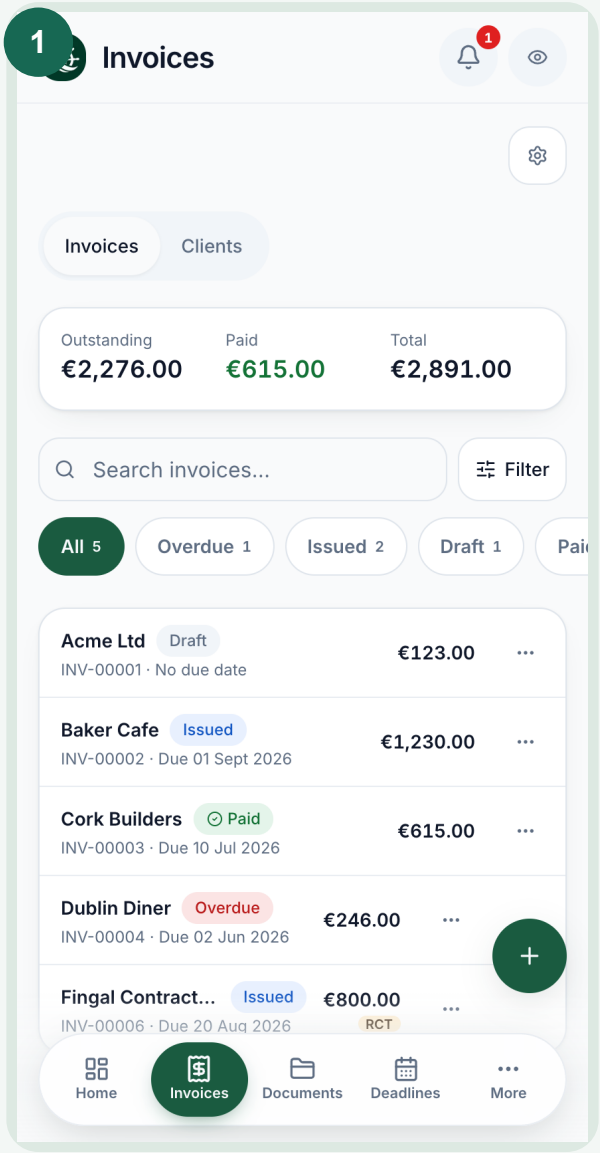
Open Documents to see files provided by you and your accountant. Use the category filters for statements, receipts and other files. Search helps you find a particular filename. To add a file, select Upload document. A successful upload does not mean the accounting review has been completed.

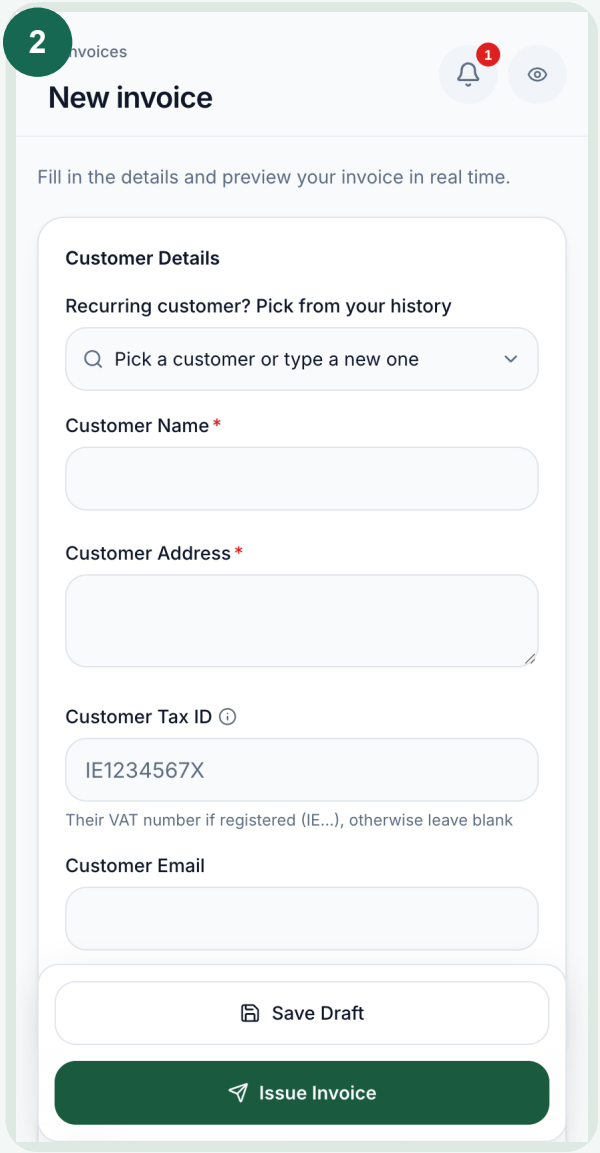
Documents by email

When this feature is active for your account, Documents shows a personal address for receiving attachments. Copy the address from your own screen to forward invoices and receipts. The address shown here is only a demonstration. If activation is pending, confirm availability with ARAN before relying on this channel.

The document-receiving address belongs to your account. Copy the address displayed in the app.

Start an invoice





Track your invoices

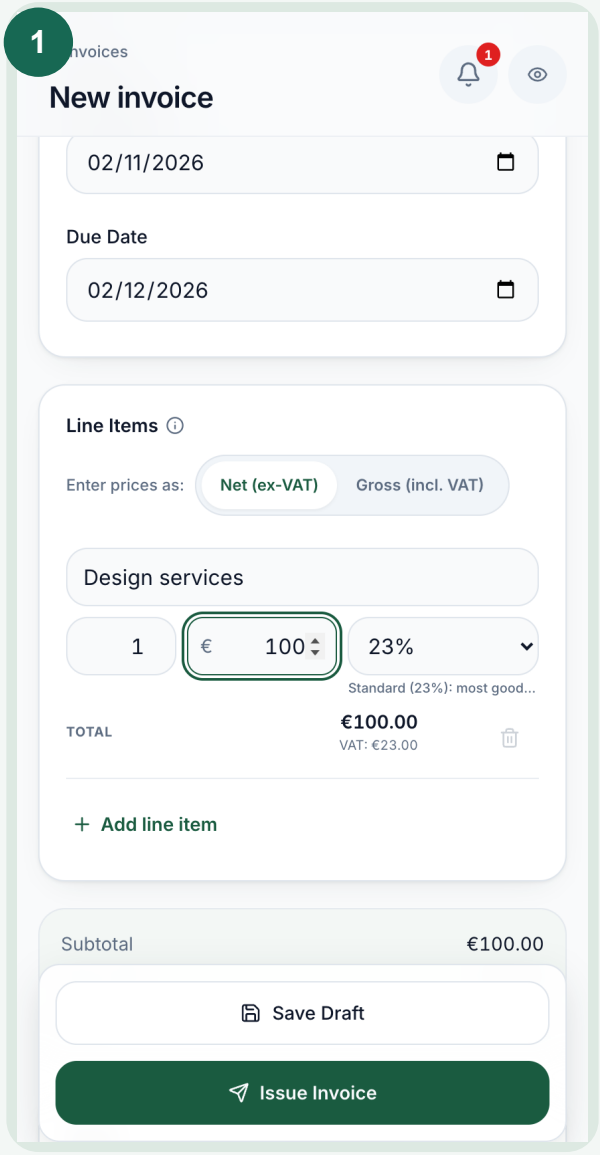
Open Invoices. Browse the list and use search or status filters. Draft, issued, paid and overdue describe different stages. Open an invoice to see its details and available actions. To start another one, use the new-invoice button. Available actions depend on your account permissions.

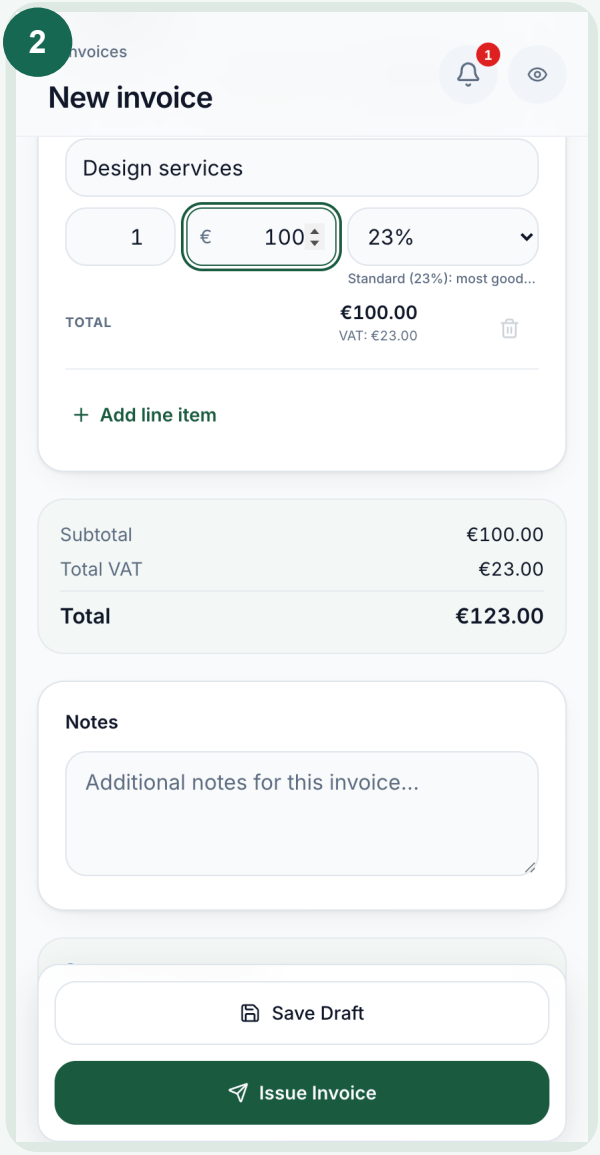
Enter the customer details

Enter your customer's name and address. Use the existing customer history when available. Check the recipient email, issue date and due date. Enter the customer's VAT number only when they have one. Do not invent a number to fill an optional field.

In Portuguese the menu may show Notas; in English, Invoices. This feature depends on account permissions.

Items, amounts and issuing





Describe the service or product

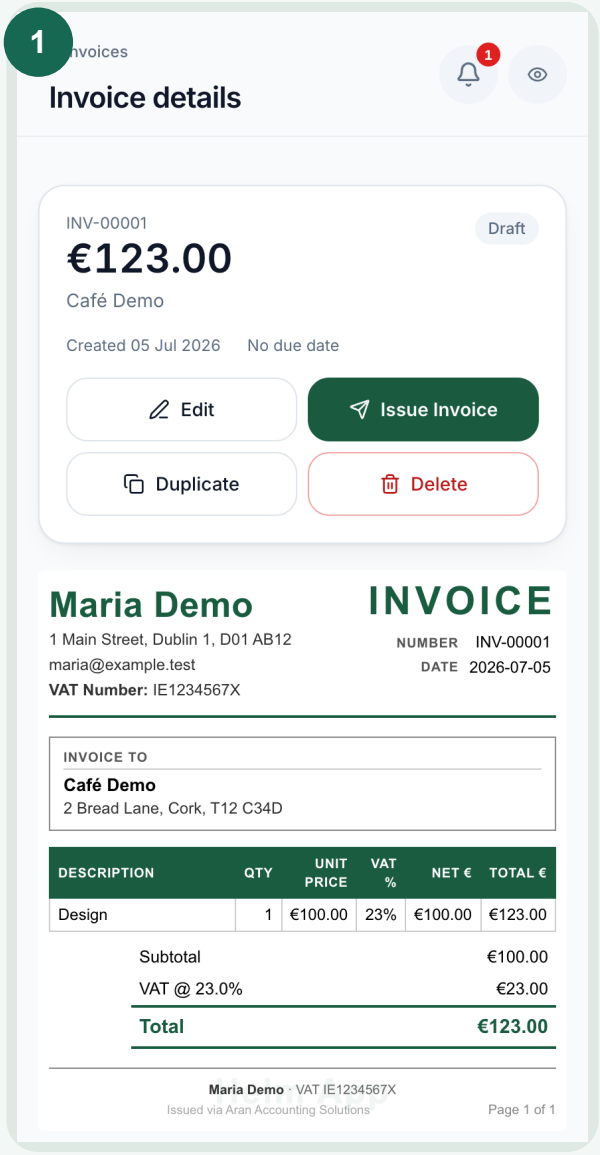
For each item, enter a clear description, quantity and price. Add more lines when needed. Check whether you are entering net or gross prices. VAT and RCT depend on your business settings. Follow the treatment confirmed by your accountant; the figures in this example are not a tax recommendation.

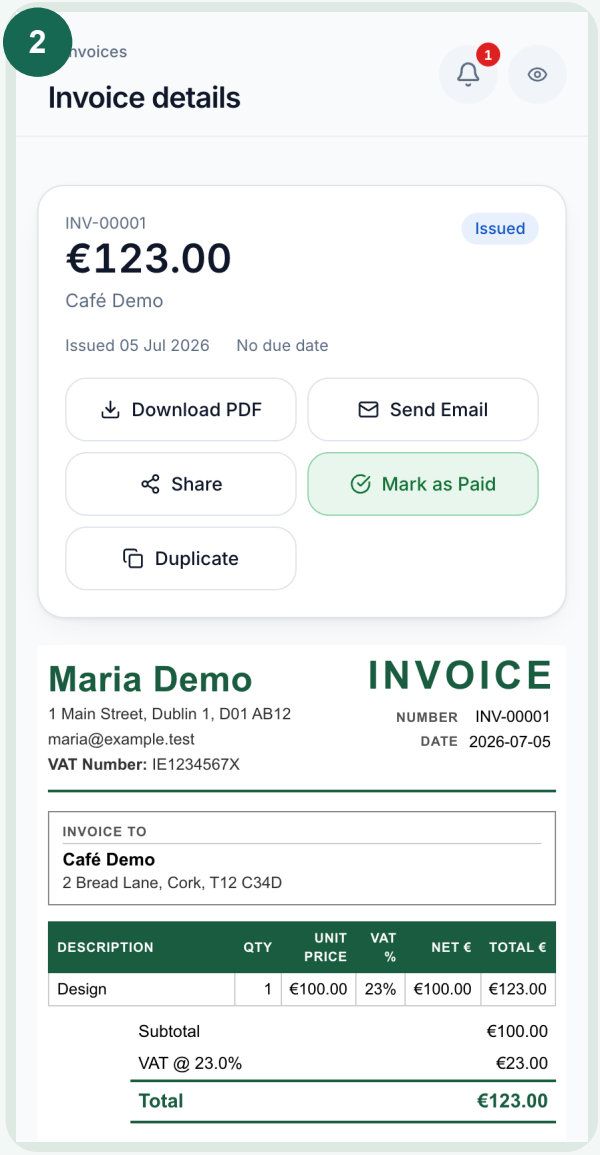
Review before issuing

Check the customer, dates, items, subtotal, VAT and total. Review any notes and payment details. Save Draft lets you continue later. Issue Invoice creates the issued invoice. In this demonstration, a one-hundred-euro line with twenty-three euros of VAT produces a total of one hundred and twenty-three euros.

Follow the tax settings confirmed by your accountant. The displayed amounts are examples only.

From draft to PDF





Continue a draft

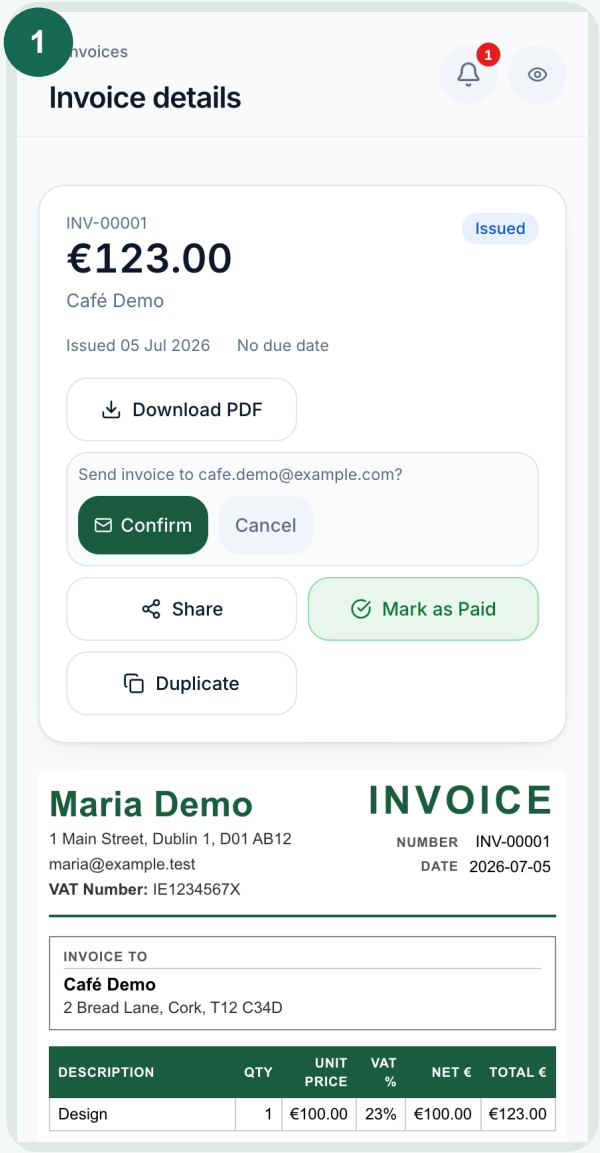
Open a draft to check its preview and edit its details. When everything is correct, select Issue Invoice. Duplicate provides a starting point for another invoice; review the customer, dates and amounts before using it. Do not treat a draft as an invoice that has already been issued.

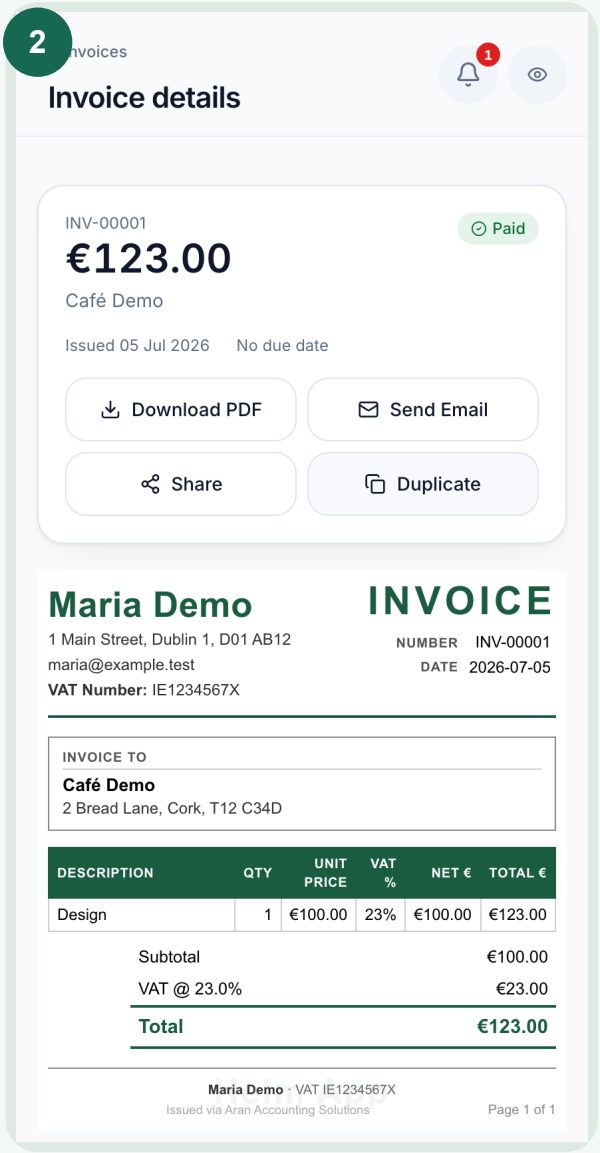
Save and share the PDF

After issuing, check that the status is Issued. Download PDF saves or opens the final document, depending on your device. Share offers the available options for sending it to the recipient. Always check the document and recipient first. Contact your accountant if an issued invoice needs correction or cancellation.

Always check the recipient and contents before issuing, downloading or sharing the document.

Sending and receiving payment





Email the invoice

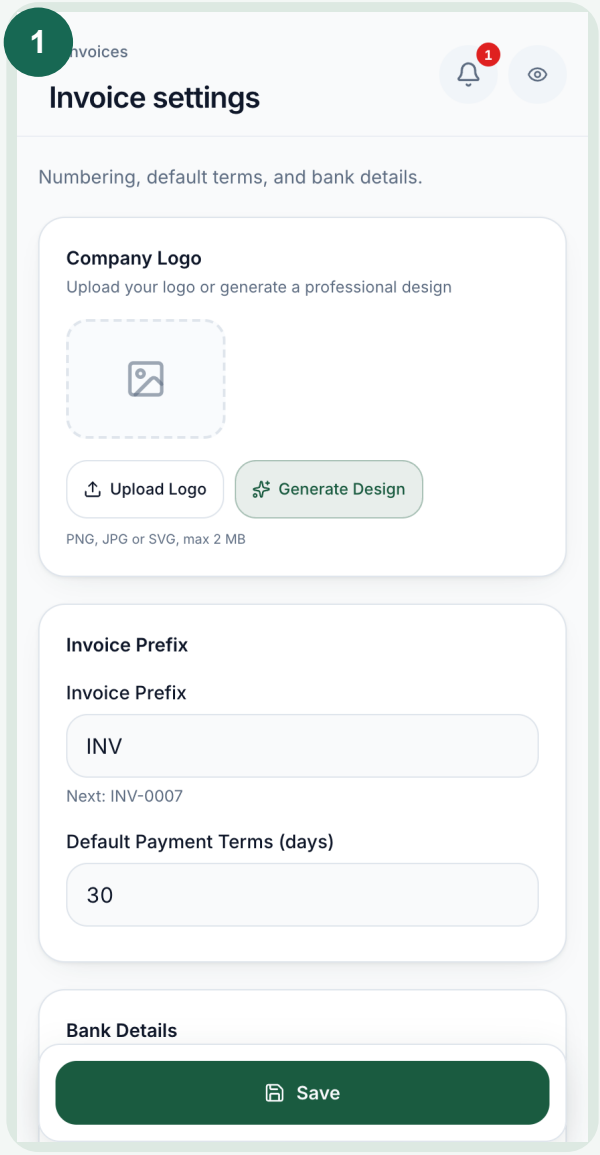
Choose Send by Email and check the address shown. Correct the recipient if needed and confirm only after reviewing it. A previous delivery may appear as Resend Email. Avoid unnecessary repeat sends. Every action in this demonstration is simulated; no invoice has been sent to a real person.

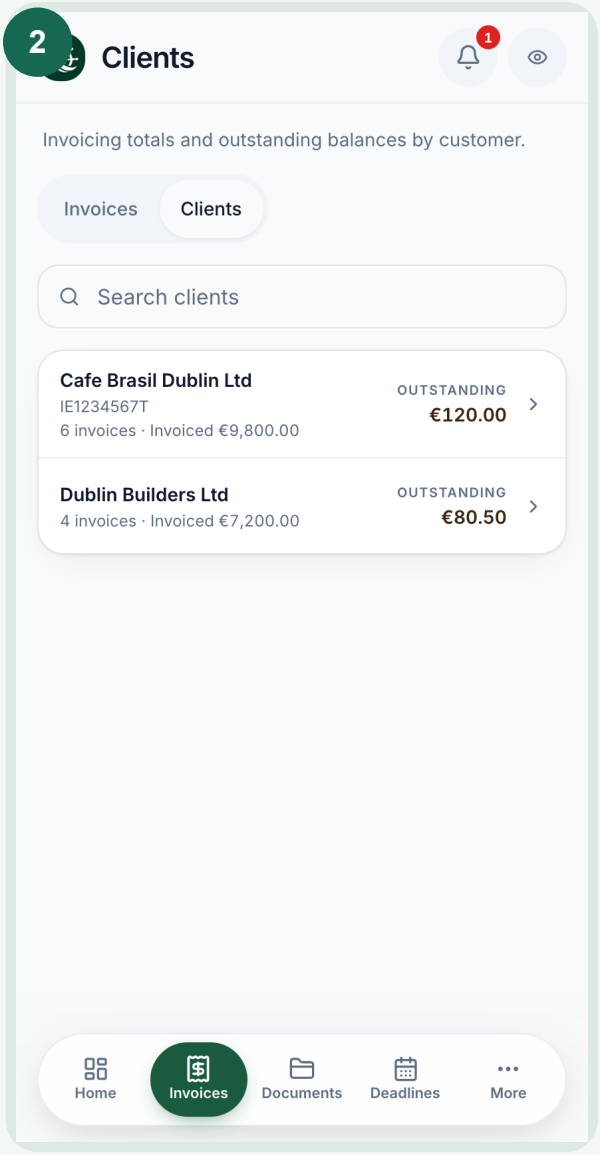
Record a received payment

When you have confirmed that payment was received, choose Mark as Paid. Check that the status changes to Paid. This button records the invoice status in Helm; it does not charge your customer or transfer money. If you selected it by mistake or received a partial payment, ask your accountant for guidance.

Mark as Paid records money already received. It does not charge the customer or transfer money.

Invoice settings and customers





Set up your invoices

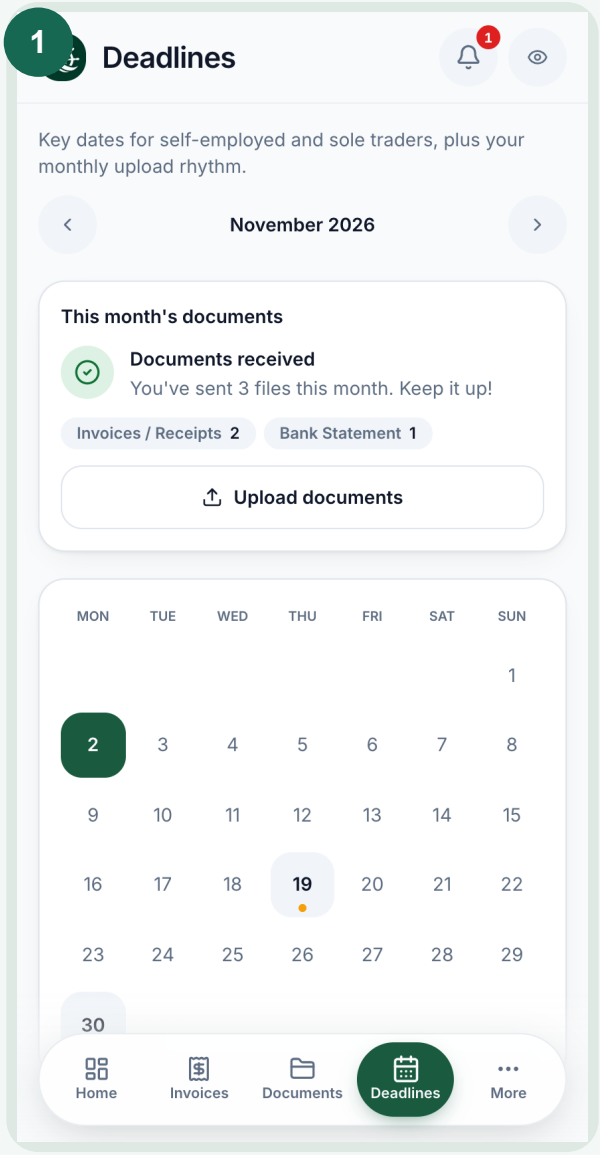
In invoice settings, review your logo, prefix, default payment terms, bank details and accent colour, according to your permissions. Carefully check the information that will appear on the PDF. Save the changes and review a preview. Tax settings follow your registration and your accountant's guidance.

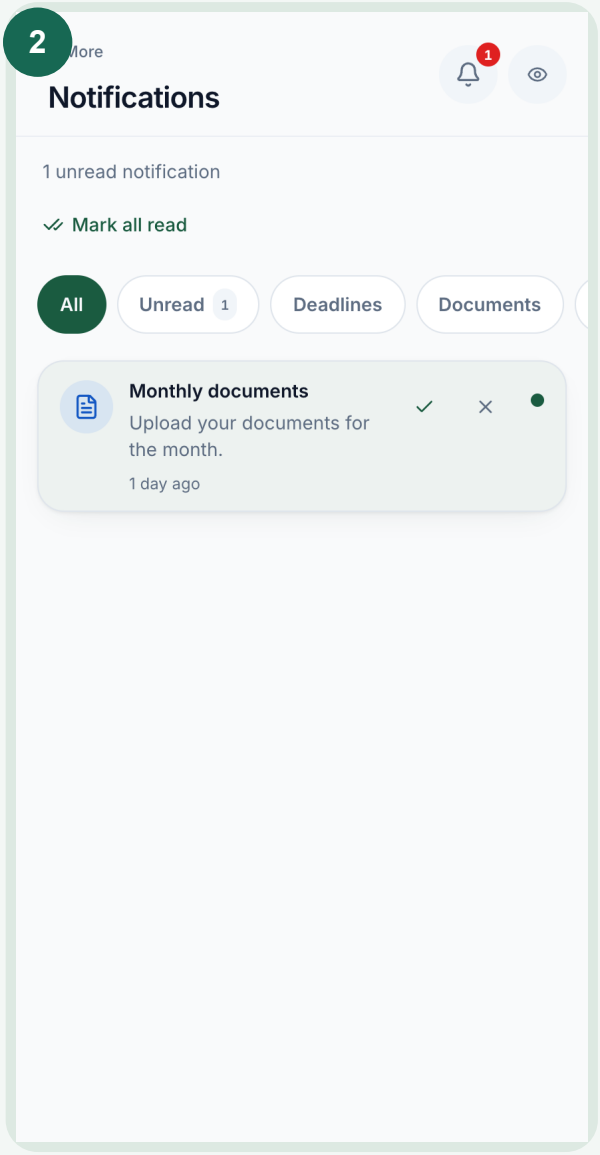
View balances by customer

In Customers, search for a recipient and review invoiced and outstanding amounts. Select the customer to open their related invoices. Check the currency before comparing figures. In Solo, this screen groups information from invoices; it is not a separate list of every contact you have.

Bank details and the logo may appear in the PDF. Save and check a preview after making changes.

Deadlines and notifications





Check deadlines and uploads

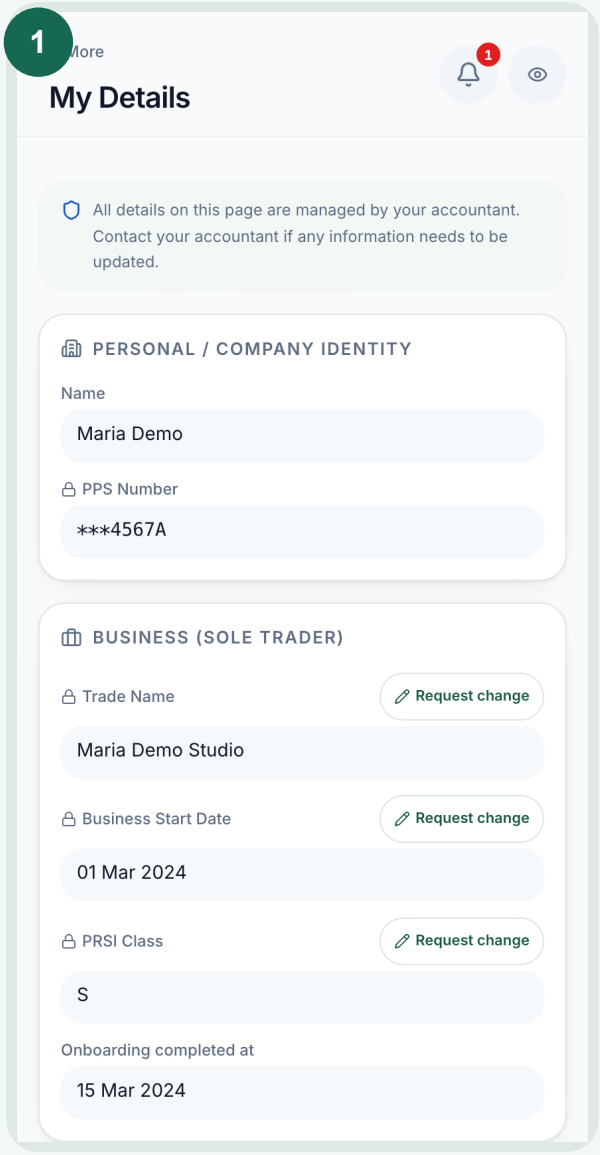
Open Deadlines and move between months. Review reminders relevant to your account and track document-upload activity. Use the calendar to stay organised. The examples on screen depend on account settings and do not replace confirmation of a specific obligation or date with your accountant.

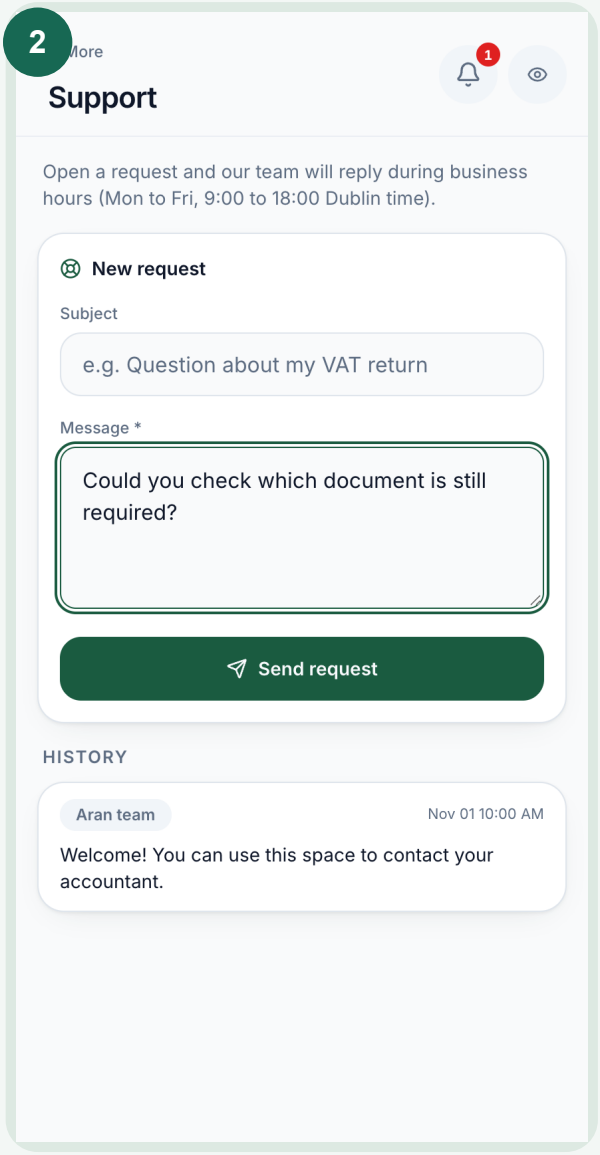
Keep track of notifications

The bell opens your account notifications. Read each request and follow its shortcut when one is available. Use filters to find unread notices or a particular type. To receive reminders on your phone, check Helm settings and also allow notifications in your device settings.

Reminders depend on your account setup. Confirm specific obligations with your accountant.

Your details and support





Check your details

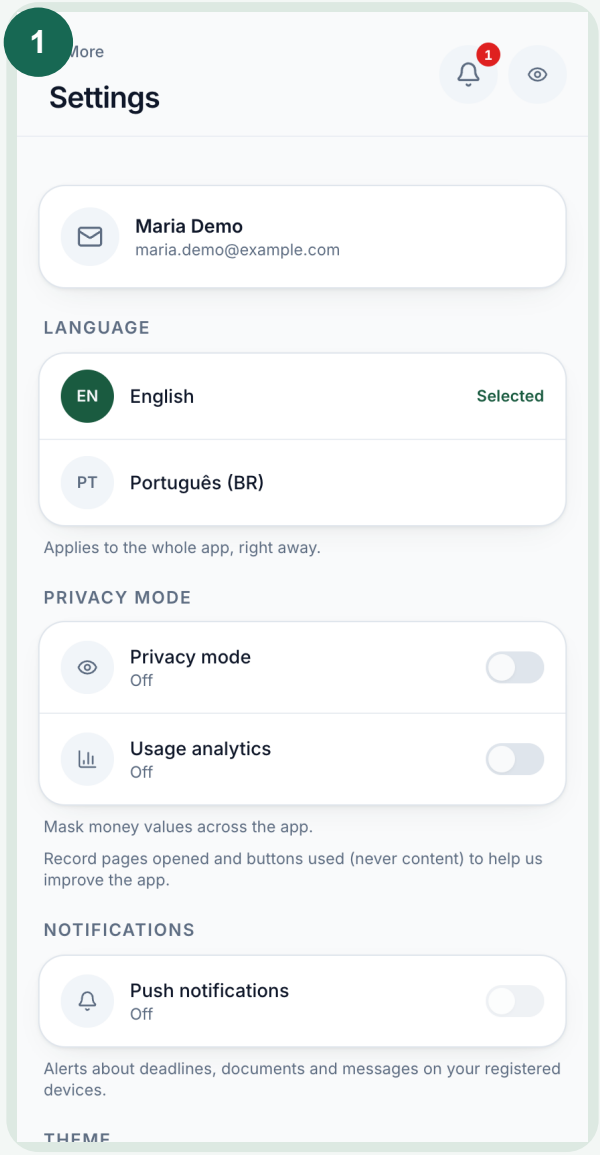
From More, open My Details. Check your identity, contact information, address, business and bank details. Some information is managed by your accountant. Use Request Change where it is available; for other fields, open a support request. A pending request does not mean the stored details have already changed.

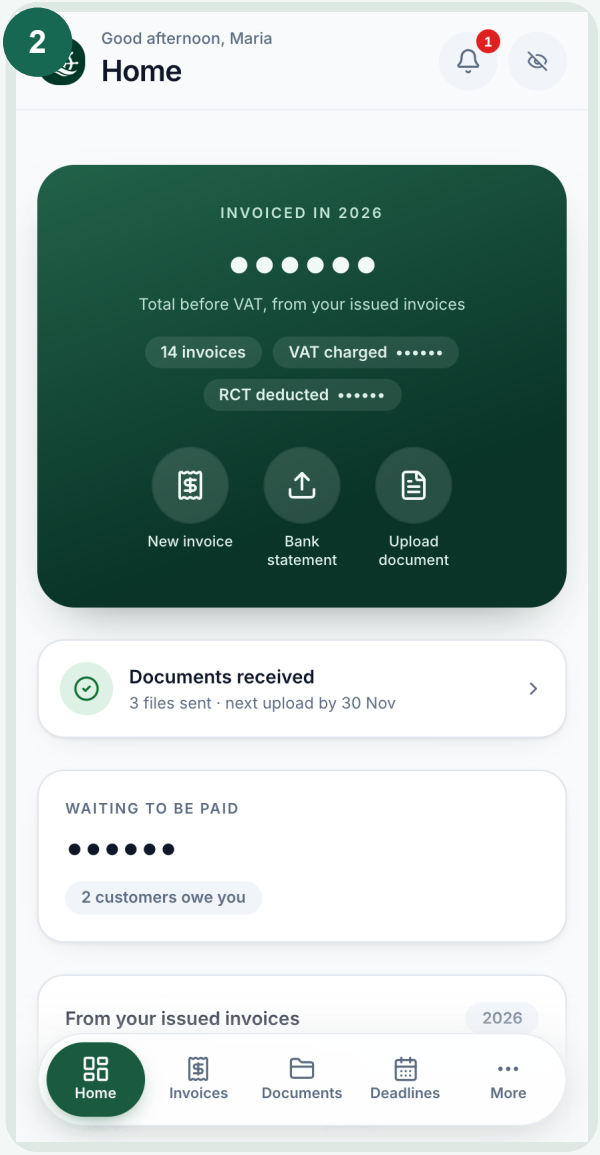
Contact your accountant

In Support, enter a clear subject and explain what you need. Include the document name or invoice number when helpful. Send the request and follow the conversation in the history. If an error occurs, keep your text and retry as instructed on screen. The request shown here is fictional.

Explain your question clearly and identify the relevant document. Follow the reply in the history.

Preferences and privacy





Language, theme and access

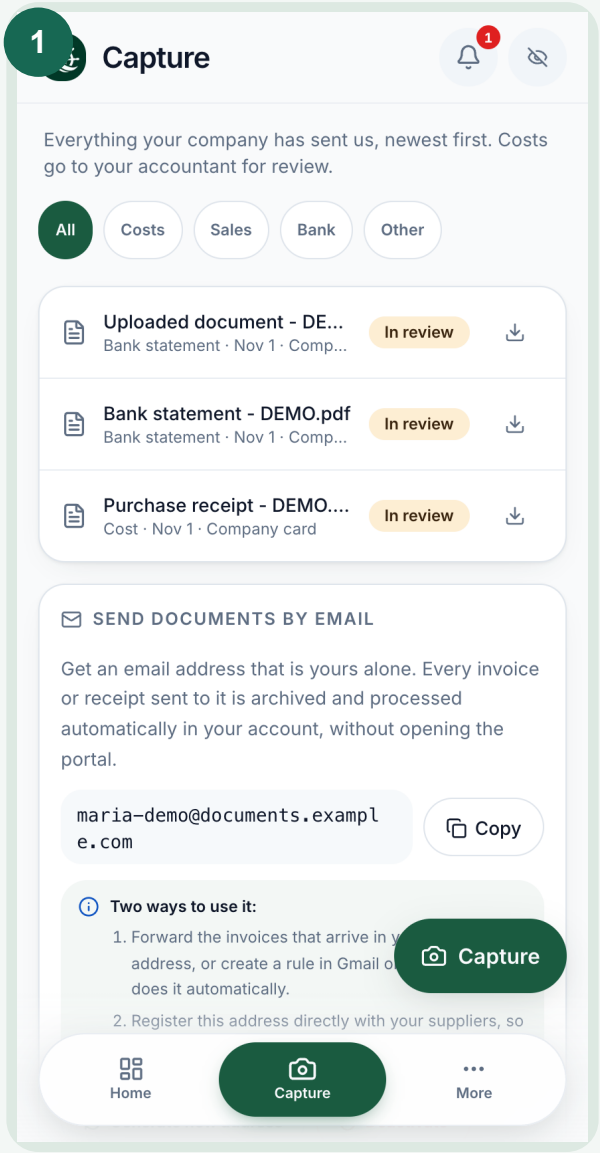
In Settings, choose your language and light or dark theme. Review notification and help options available on your device. When finished on a shared computer, use Log Out. Biometric app lock, when offered, depends on the app and device; it is not a feature of the ordinary browser session.

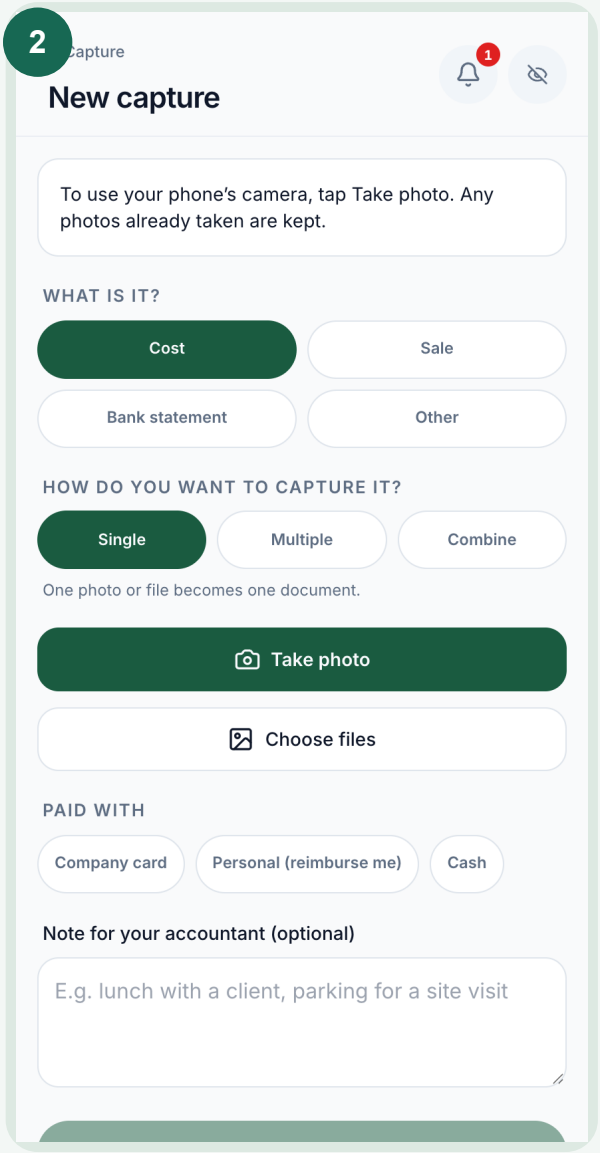
Hide amounts on screen

Privacy mode helps hide amounts when you use Helm around other people. Turn it on or off using the available interface control. It changes the display, not the account data. To inspect a figure, turn privacy mode off again in a suitable setting.

On a shared computer, log out when finished. Hiding amounts changes the display only.

When your menu shows Capture





If your menu shows Capture

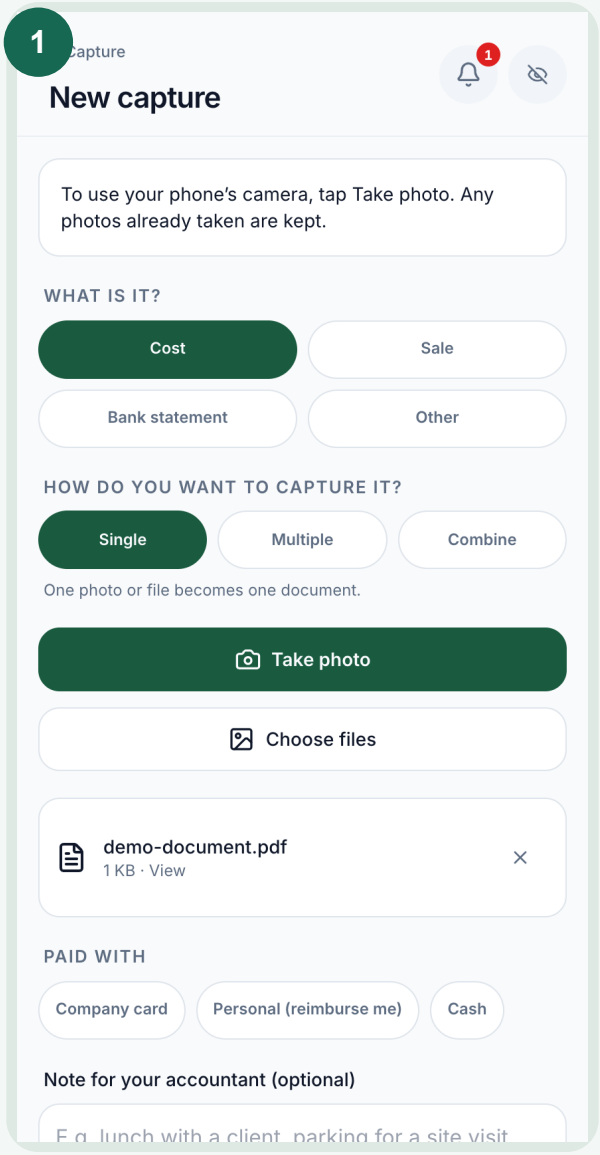
Some sole traders and self-employed clients with monthly accounting use Helm Limited. This experience brings documents together in Capture. It does not turn your business into a limited company. Use the Costs, Sales, Bank and Other tabs. Invoices appear only when your account has the relevant permission.

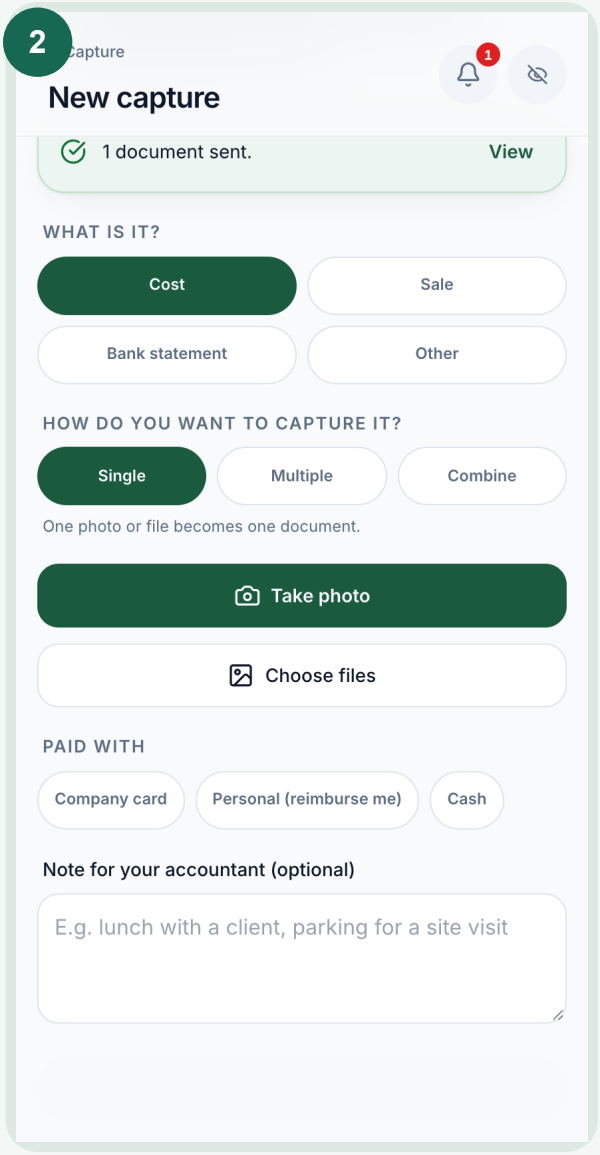
Choose the capture type

Select Capture and choose whether the document is a cost, sale, bank statement or another type. Use Take Photo or Choose Files. Allow camera access on your device if requested. If the camera does not open, choose a saved file. Check that the whole image is readable before continuing.

Some self-employed accounts use this interface. It does not turn your business into a limited company.

Check and track the capture





Review the captured document

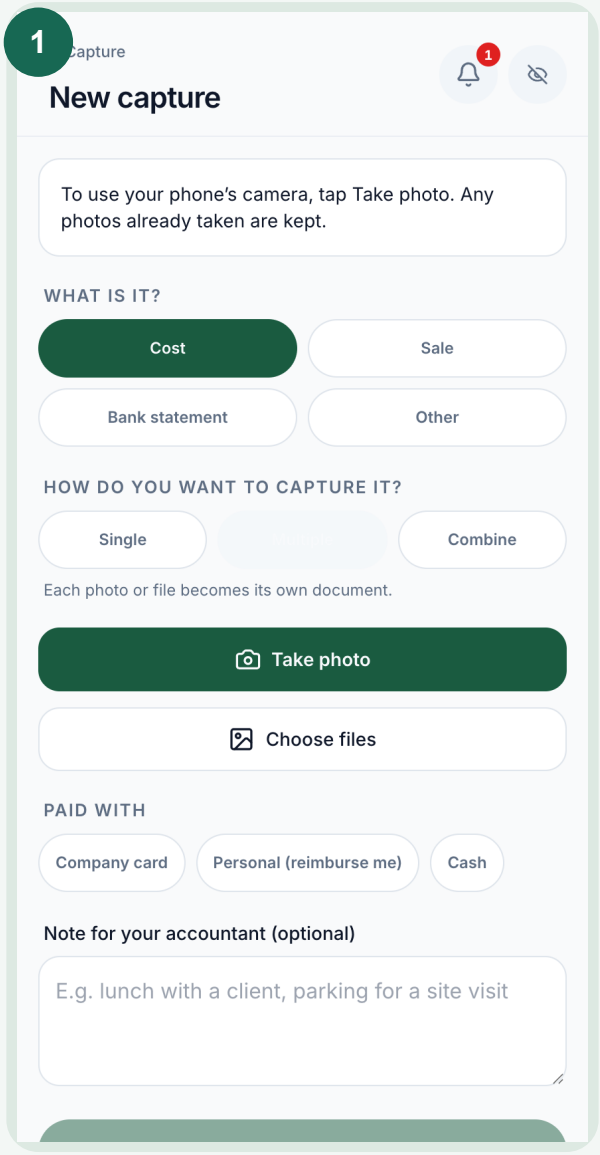
Check the selected file and open its preview if needed. Where the form asks, indicate how the expense was paid and add a helpful note for your accountant. Do not change what the document represents. Then select Send and keep the screen open until you receive confirmation.

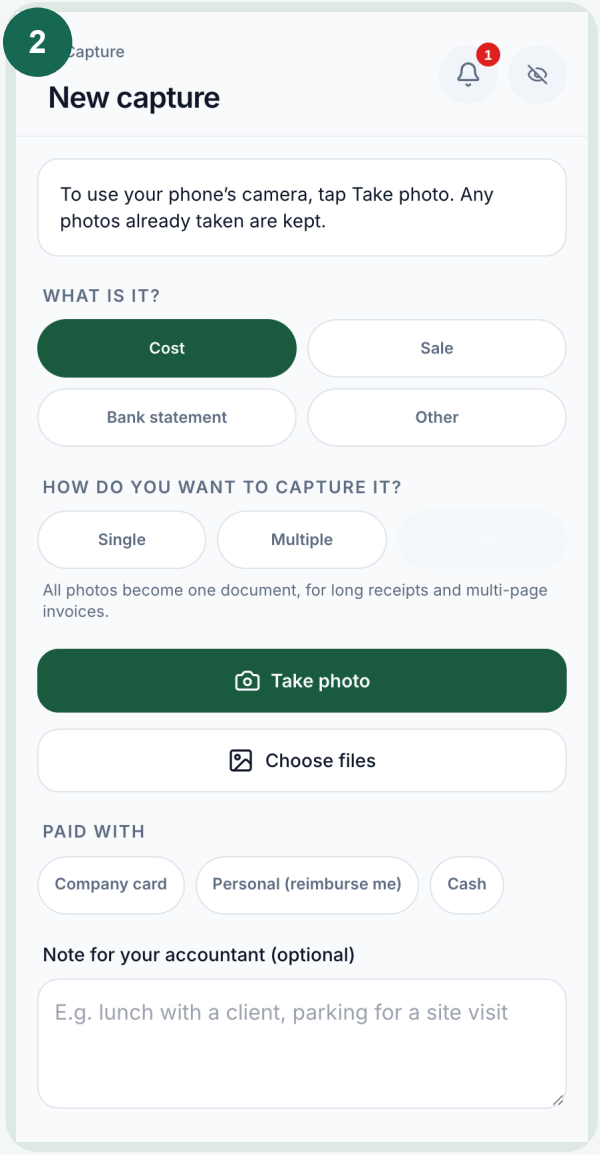
Follow the processing status

After sending, return to the list to follow the document. Received, processing, in review and completed are different states. If Not Accepted appears, check your accountant's guidance. A partial failure may leave pending files on screen. Retry only the items that the app identifies as pending.

Keep the screen open until confirmation. After a partial failure, retry only the pending files.

Several files or one document





Multiple: separate documents

Choose Multiple when each photo or file represents a different document. Check the count before sending. Each document should remain separate from the others.

Combine: pages of one document

Choose Combine for an invoice or another document with several pages. Check the order and readability of every page. Do not mix different purchases or documents.

Multiple keeps documents separate. Combine joins pages of the same document. Do not combine unrelated purchases.

We are here to help

If you have any questions, contact our chatbot or send us an email. A member of our team will get back to you.

CHATBOT

Talk to our virtual assistant.

EMAIL

info@aran-accounting.ie

Include your name and explain what you need. If the question concerns a document, identify it.