Athena Accounting

Quick Start Guide

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AI-first Malaysian double-entry accounting & e-Invoice

Athena Accounting — Quick Start Guide

Get productive in about 15 minutes

Welcome to **Athena Accounting**, AthenaLab's AI-first, double-entry accounting and e-Invoice platform for Malaysian businesses. This guide takes you from a fresh login to your first invoice and payment, with the dashboard showing real numbers along the way.

> **Core principle:** Athena's AI prepares your bookkeeping — extracting data from receipts, suggesting journal entries, drafting invoices. **A human always reviews and approves before anything posts.** Nothing you read in this guide involves the AI silently changing your books.

This guide assumes someone at your organisation has already installed Athena Accounting (see `INSTALLATION_GUIDE.md`) and given you a login. If you are the one installing it, finish that first.

Before you start

You'll need:

- The web address of your Athena Accounting installation (e.g.

`https://accounts.yourcompany.com`), or `http://localhost:8020` for a local trial.

- Your email and password (or the demo login below).
- About 15 minutes and a real (or sample) customer to invoice.

> **Tip:** For a first look with no setup at all, use the demo login: `admin@athenalab.com` / `AthenaLab2026!`. Change this password immediately if you plan to keep using this installation — see Step 1.

Step 1: Log in

1. Open your Athena Accounting URL in a browser and go to `/app` (desktop) —

for example `https://accounts.yourcompany.com/app`.

1. Enter your email and password, then select **Log in**.
2. On first login you'll land on the **Dashboard** — it will look mostly

empty until you complete the next few steps.

!Login screen *Caption: the Athena Accounting login screen — AthenaLab teal branding, email and password fields, "Log in" button.*

> **Warning:** If you're using the demo credentials on a shared or internet-facing installation, go to **Settings** → **My Profile** and change the password now. Anyone who knows the demo password can sign in.

Step 2: Set up your company (onboarding wizard)

If your organisation hasn't been set up yet, Athena walks you through an onboarding wizard the first time you log in as an administrator.

1. From the prompt (or **Settings** → **Company**), select **Start onboarding**.
2. Enter your **company name**, **registration details**, and **base

currency** (MYR is pre-selected for Malaysian businesses).

1. Choose whether to install the **starter chart of accounts** — a ready-made

set of common Malaysian small-business accounts (recommended for almost everyone; you can edit it later).

1. Review your **subscription plan** (you start on a 14-day Free Trial by

default — see `docs/USER_MANUAL.md` Chapter 13 for plan details) and confirm.

1. Select **Finish setup**.

!Onboarding wizard *Caption: the company onboarding wizard — company details, starter chart of accounts toggle, plan summary, "Finish setup" button.*

> **Tip:** Not sure what a "chart of accounts" is? It's simply the list of categories your money moves through — bank, sales, rent, salaries, and so on. The starter chart gives you a sensible Malaysian default so you don't have to build one from scratch.

Step 3: Check your chart of accounts

1. Go to **Accounts** in the left-hand navigation.
2. You'll see a list of accounts grouped by type: **Asset**, **Liability**,

Equity, **Revenue**, **Expense**.

1. Skim the list. If you installed the starter chart, common accounts like

Cash at Bank, *Trade Receivables*, *Sales Revenue*, and *Office Expenses* are already there.

1. To add an account specific to your business (e.g. "Delivery Charges"),

select **New Account**, choose its type, give it a name and code, and save.

!Chart of accounts *Caption: the Accounts screen, showing accounts grouped by ASSET / LIABILITY / EQUITY / REVENUE / EXPENSE, with a "New Account" button.*

> You don't need to be an accountant to do this — if in doubt, leave the starter chart as-is and ask your bookkeeper to review it later. Nothing is locked in.

Step 4: Add your first customer

1. Go to **Customers** (under **Sales**).
2. Select **New Customer**.
3. Enter the customer's name, email, phone, and billing address. If you'll

be submitting e-Invoices to MyInvois for this customer, add their **TIN** (Tax Identification Number) here too — you can also add it later.

1. Select **Save**.

!New customer form *Caption: the New Customer form — name, contact details, billing address, TIN field, Save button.*

Step 5: Create your first sales invoice

1. Go to **Sales Invoices** and select **New Invoice**.
2. Choose the customer you just created.
3. Add one or more line items: description, quantity, unit price, and tax

code (e.g. an SST code if applicable — see Chapter 4 of the User Manual).

1. Review the total, then select **Save as Draft**.
2. Open the draft and select **Approve**, then **Post**. Posting is the one

moment a transaction becomes a permanent, numbered part of your ledger.

!New sales invoice *Caption: the New Sales Invoice screen — customer picker, line items, tax code column, running total, Save as Draft button.*

> **Tip:** Invoices, bills, and journals all follow the same lifecycle: **Draft** → **Approved** → **Posted**. You can edit or discard a Draft freely. Once something is Posted, correcting it means posting a **reversal**, not silently editing history — this is what keeps your books trustworthy.

Step 6: Record a payment

1. Go to **Customer Payments** and select **New Payment**.
2. Choose the customer, the amount received, the date, and the bank/cash

account it landed in.

1. **Allocate** the payment to the invoice you just posted (Athena

suggests the open invoice automatically if the amount matches).

1. Select **Save**. The invoice's outstanding balance updates immediately.

!Record payment *Caption: the New Customer Payment screen — customer, amount, account, allocation to the open invoice, Save button.*

Step 7: See it on the dashboard

1. Go back to **Dashboard**.
2. You should now see:
3. **Money In / Money Out** reflecting your posted invoice and payment.
4. **Current Profit** updated.
5. An entry in **Recent Activity** for each posted transaction.
6. Open **Reports** → **Trial Balance** to see the same numbers from an

accounting point of view — debits and credits in balance.

!Dashboard with activity *Caption: the Dashboard after the first invoice and payment — Money In/Out tiles, Current Profit, income-vs-expense chart, Recent Activity list showing the new invoice and payment.*

You're up and running

In about 15 minutes you've: logged in, set up your company, checked your chart of accounts, added a customer, raised and posted an invoice, recorded a payment, and watched the dashboard update. That's the full core loop of Athena Accounting.

Where to go next

Goal	Where
Learn every module in depth	`docs/USER_MANUAL.md`
Let AI pull bills from receipts/PDFs	`USER_MANUAL.md` Chapter 3 — AI Document Intake
Submit e-Invoices to MyInvois	`USER_MANUAL.md` Chapter 4 — Tax & e-Invoice
Import a bank statement & reconcile	`USER_MANUAL.md` Chapter 5 — Bank
Ask questions about your own numbers	`USER_MANUAL.md` Chapter 8 — Ask Athena
Invite teammates and manage roles	`docs/ADMIN_GUIDE.md`
Install or move to production	`docs/INSTALLATION_GUIDE.md`
Something not working?	`docs/TROUBLESHOOTING_GUIDE.md`

> **Warning:** Athena Accounting helps you keep accurate books and prepare compliant e-Invoices, but it is not a substitute for professional advice. Before your first real MyInvois submission, review `docs/COMPLIANCE_CHECKLIST.md` with a qualified Malaysian tax adviser.