

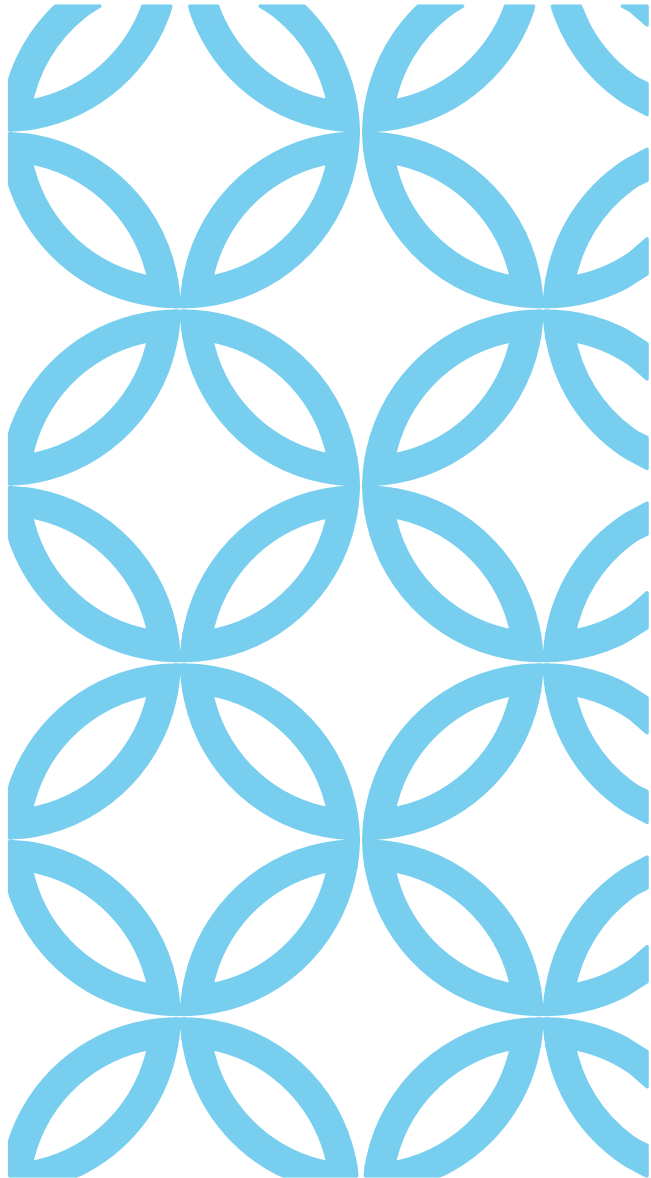


# BUILDING DIGITAL COMPETENCY

RANCHI BRANCH OF  
ICAI

February 19, 2021

CA RICHA K LUNIA



## Disclaimer

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**CA RICHA K LUNIA**

**ACA, DISA(ICAI), MCOM**

# OUTLINE

1. The present situation at CA office
2. Roadmap for technology adoption
3. The digital strategy
4. Being Future Ready firms

# 1. THE PRESENT SITUATION AT CA OFFICE

- Heavy Dependence on Staff and articles
- No standard process
- Difficulty in tracking daily tasks
- No Automation
- Huge pile of books
- Limited Value Addition to Client

## 2. ROADMAP FOR TECHNOLOGY ADOPTION



# THE NEED TO BE DIGITALLY COMPETENT



- Efficient & Effective work
- Data maintenance
- Data Sharing
- Presentation
- Improvisations
- Delivering Value to client

# 3. THE DIGITAL STRATEGY

## ESSENTIAL TOOLS FOR PRACTICE

- Practice Management System
- Document Management System
- Communication Tools
- Collaboration & Sharing
- Marketing

# PRACTICE MANAGEMENT SYSTEM



[www.cmpbenefits.icai.org](http://www.cmpbenefits.icai.org)





# CORDL

User limit as per
Feedback
New
5
Quick Links

CA Rajendra Kumar Lunia

**STANDARD**

**R S ASSOCIATES**

- [Dashboard](#)
- [Clients](#)
- [Task](#)
- [Invoice](#)
- [Recurring Invoice](#)
- [Calendar](#)
- [Timesheet](#)

## Dashboard

### Open Tasks

0 (Partner Reference)

0	388	15
ASSIGNEE	REPORTER	BOTH
<b>TOTAL</b>		<b>403</b>

### Completed Tasks

0 (Partner Reference)

0	0	0
ASSIGNEE	REPORTER	BOTH
<b>TOTAL</b>		<b>0</b>

### Overdue Tasks

0 (Partner Reference)

0	388	15
ASSIGNEE	REPORTER	BOTH
<b>TOTAL</b>		<b>403</b>

### Login Info

Logged in Today	1
Not Logged In	2
On Leave	0
LoginTime	9:35 AM

# DOCUMENT MANAGEMENT SYSTEM

## Get Microsoft Teams for free

That's right, free. As in \$0. Work together with features like chat, file sharing, and video calling.

SIGN UP FOR FREE

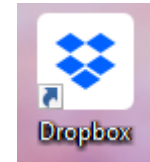
### Connect

Reach your colleagues wherever they are.



### Create

Everything you need to bring your project to life.



### Access

Store files and find what you need instantly.



Word



Excel



Outlook



Powerpoint



OneNote



Publisher



Access



OneDrive



Skype

# COMMUNICATION TOOLS



# ALL IN ONE: ZOHU REMOTELY

The screenshot shows the Zoho Remotely website interface. At the top, there is a browser tab for 'Zoho Remotely- The Remote Wo' and a URL bar with 'https://www.zoho.com/remotely/'. The Zoho logo and 'Remotely' text are on the left, with 'Pricing' and 'Webinars' links on the right. The main content area features the heading 'APPS INCLUDED IN ZOHU REMOTELY' and a grid of app icons. The icons are grouped into four categories: Meeting & Communication (Clique, Meeting, ShowTime), Storage (WorkDrive), Tracking (Projects, Sprints), and Document / Spreadsheet / PPT (Assist, Writer, Sheet, Show). A 'Remote Screen' category is also indicated by a box above the Assist icon.

Category	Apps
Meeting & Communication	Clique, Meeting, ShowTime
Storage	WorkDrive
Tracking	Projects, Sprints
Document / Spreadsheet / PPT	Assist, Writer, Sheet, Show
Remote Screen	Assist

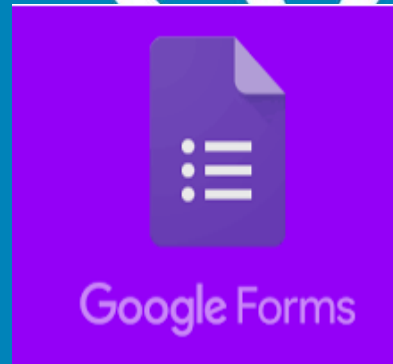
# AUTOMATION



# AUTOMATION IN OUR OFFICE

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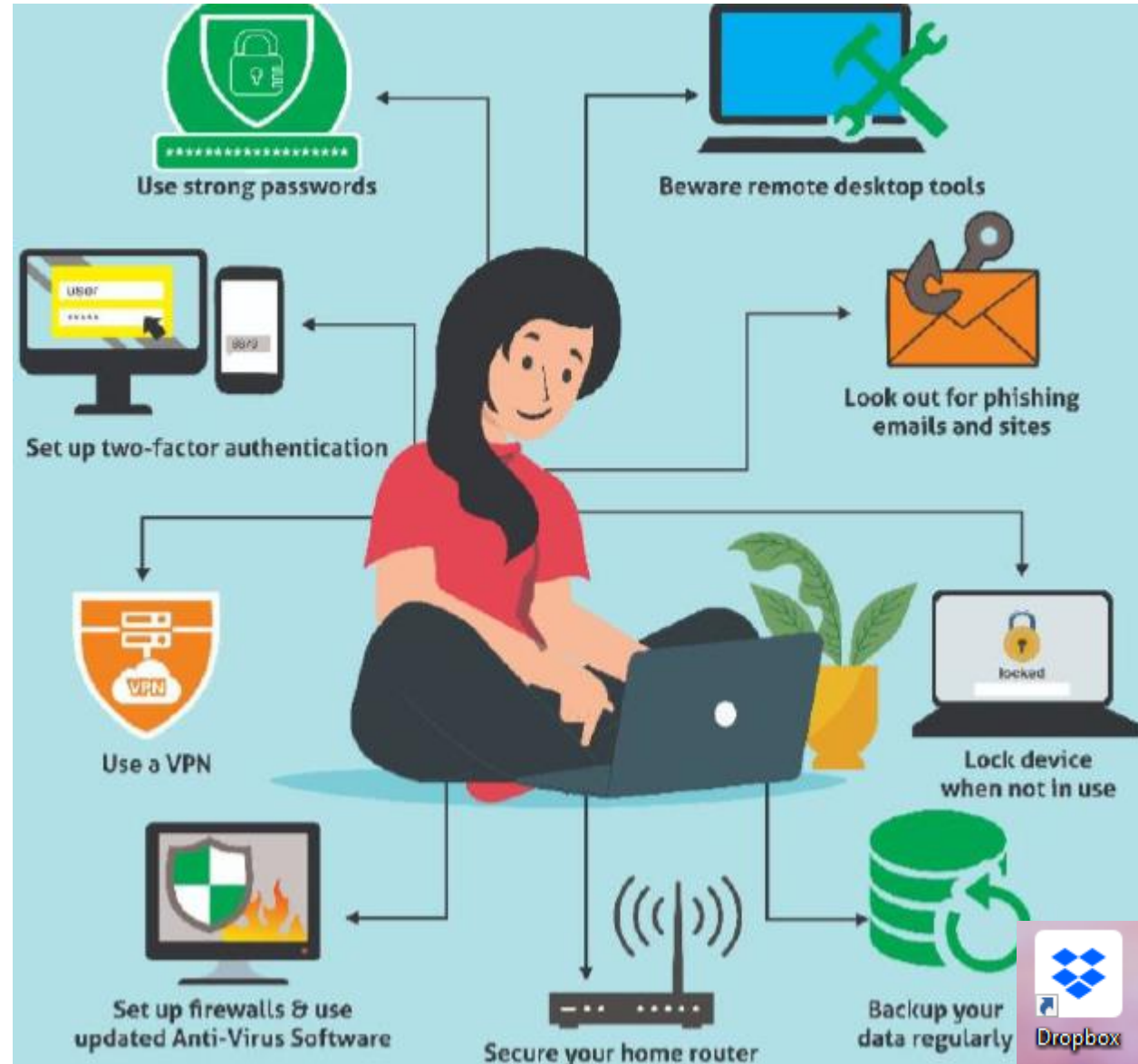
- Automation in preparation of financial statements
- Using MS Excel features
- Automatic Data Entry to Tally
- Automated Audit



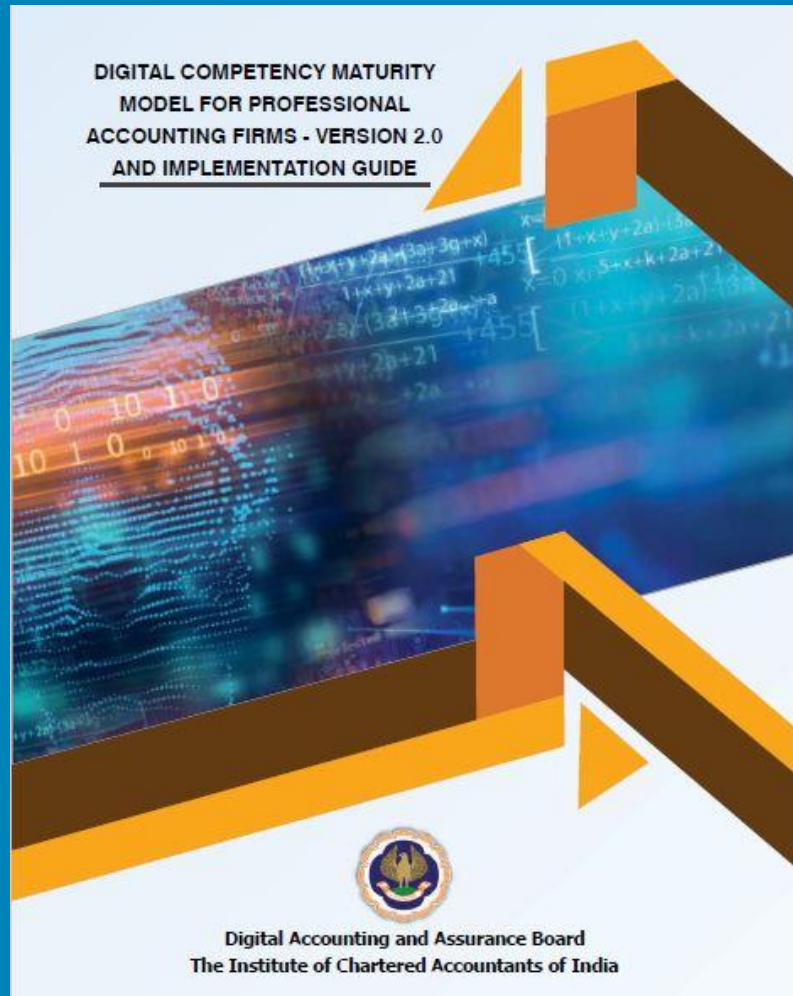
# SECURITY AND BACKUP

Access

Store files and find what you need instantly.



# 4. BEING FUTURE READY FIRMS





# EMRACE SOCIAL MEDIA



1. Making digital presence felt
2. Website
3. Facebook/LinkedIn Profile
4. You tube Channel



ITS TIME TO CHANGE  
THE AUDIT APPROACH  
FROM “TICK” TO  
“CLICK”

February 19, 2021

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Thank  
you



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