

#### The Institute of Chartered Accountants of India (Set up by an Act of Parliament)



#### **Women Members Excellence Committee**

Organises

#### यशस्विनी - An IDOL- Live Webinar





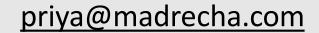
CA. Priti Paras Savla Chairperson, WMEC, ICAI CA. Kemisha Soni Vice Chairperson, WMEC, ICAI

### Welcome to Session on Work and time management for office with technology



by Priya Madrecha

Or Email me



Connect with me on



CA Priya Madrecha

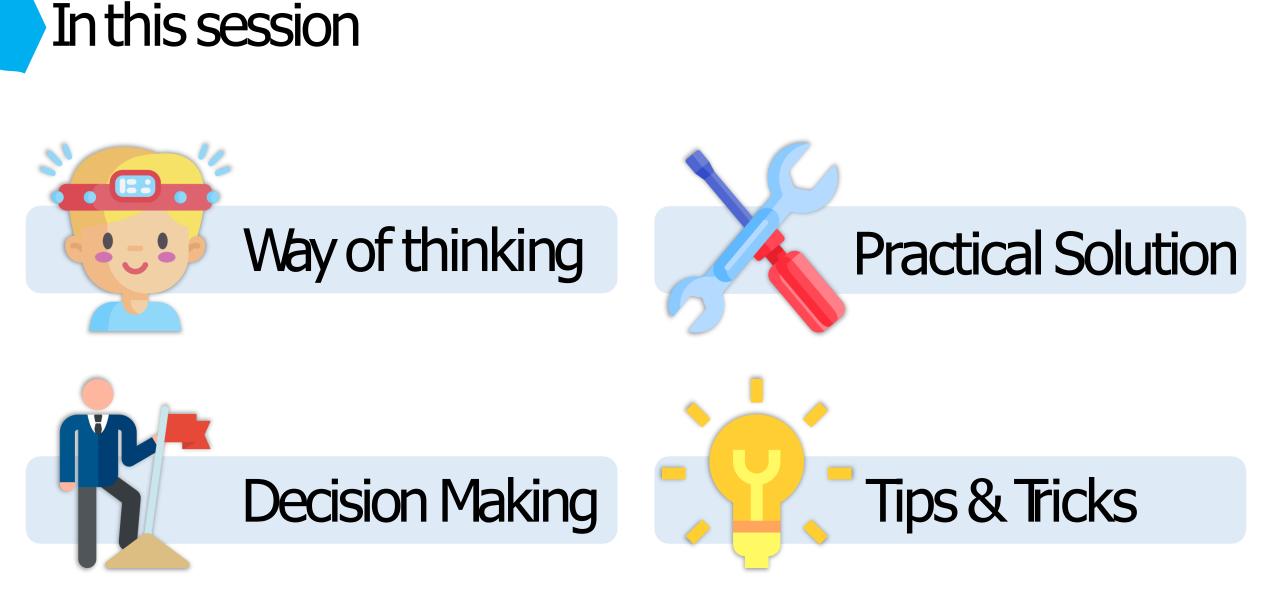


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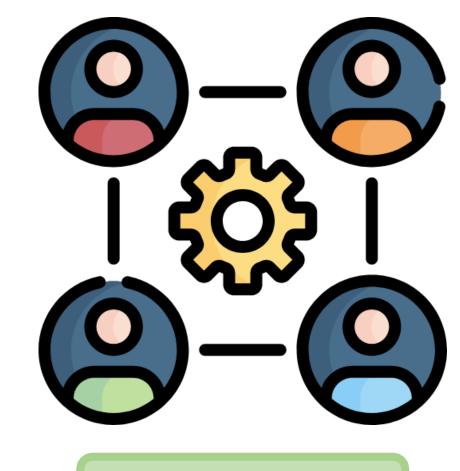
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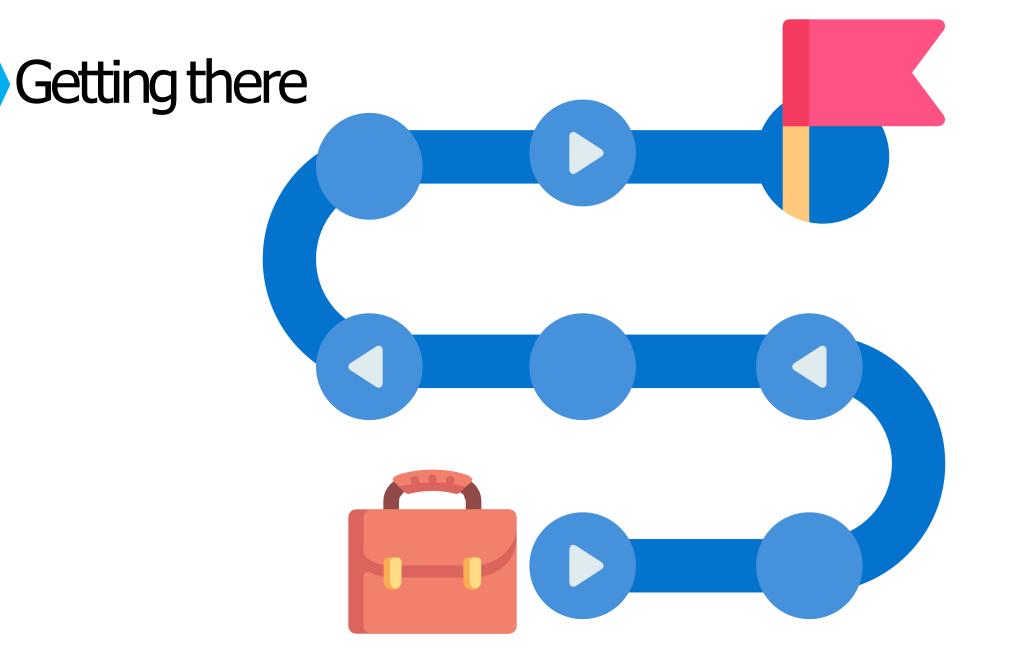








#### System Oriented



What's the count of TDS Payment/GSTR3B to be filed on a Monthly basis / Current month?

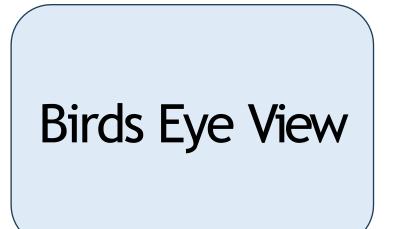
How confident you are to quickly lookup the count or list of those clients?

Ask three team members, if each answers something different, then they are not referring to same source.

### First level maturity



### Second level maturity





😑 🚣 Demo Office								+•	PriyaMam <del>-</del>
Compliance Dashboard   ?									
Report Filter All	√ Year 2021	Month Aug			gory			0	Comp
Color Legend: (Task Count)	Going Stuck Completed	Ignore							
Monthly									30s 🚱
			2021 Apr	2021 May	2021 Jun	2021 Jul	2021 Aug	2021 Sep	
GSTR3B #1			61 4 2 9	62 3 1 10	60 3 1 12	60 5 1 12	55 10 1 13	1	
GSTR1 #2			8 4	8 4	6 6	561	4 8	-	
Income Tax TDS Payment	#11		11 2	10 3	9 4	5 8	5 11	1	
GST TDS TCS Credit Retur	rn #52		1	1	2 1	2 1	2 1	-	
Quarterly									1m 💽
			2020 Q1	2020 Q2	2020 Q3	2020 Q4	2021 Q1	2021 Q2	
GSTR1 #2			64 7	66 4	64 1	40 25 1 2	27 35 1 1		
Income Tax TDS Return Fil	lling Quarterly #6		7 6	13	13	11 2	7 5 1		
GSTR4 Composition #16			3	_	_				

#### Dashboard for Birds eye view of all Recurring Services

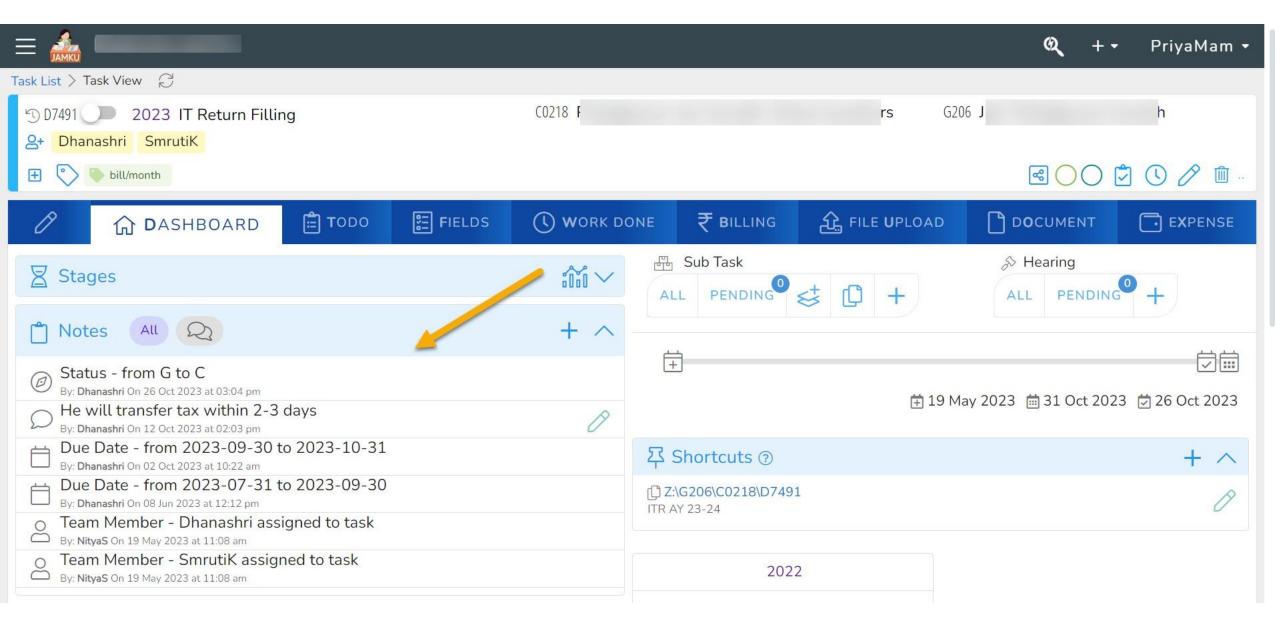
😑 🚣 Demo Office								+ • Priyal	Mam <del>-</del>
Compliance Dashboard									
Report Filter	Year	Month	_					Com	
· Only My	2021	Aug	✓ Team	~ ~	ategory	$\bigtriangledown$			
My Team	k Completed	Ignore							
All								3.5m	<u>ع</u>
			2021 Apr	2021 May	2021 Jun	2021 Jul	2021 Aug	2021 Sep	
GSTR3B #1			61 4 2 9	62 3 1 10	60 3 1 12	60 5 1 12	55 10 1 13	1	
GSTR1 #2			8 4	8 4	6 6	5 6 1	4 8		
Income Tax TDS Payment #1	11		11 2	10 3	9 4	5 8	5 11	1	
GST TDS TCS Credit Return	#52		1	1	2 1	2 1	2 1		
Quarterly								4m	$\odot$
			2020 Q1	2020 Q2	2020 Q3	2020 Q4	2021 Q1	2021 Q2	
GSTR1 #2			64 7	66 4	64 1	40 25 1 2	27 35 1 1		
Income Tax TDS Return Fillin	ng Quarterly #6		7 6	13	13	11 2	7 5 1		

#### Report filtering to ensure every team member can make use of Dashboard

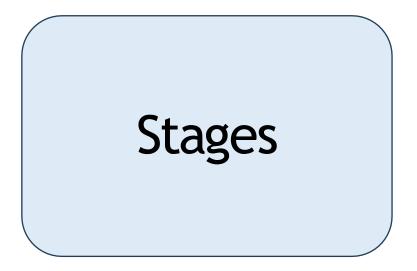
Calendar 🔇 April 2	2020 🕥			Team Member	My My Team	All 12.3m 🚱
SUN 29	<b>MON</b> 30	TUE 31	WED 1 1		FRI 3 5	SAT 4
5	6	7 121	8 3 1 1	9	10	11
12	13 1	14 6 2	15 2	16 <b>2</b>	17	18
19	20 9	21	22 <b>2</b>	23	24 6 1 1	25
26	27	28 <b>7</b>	29	30 <b>8 3 1</b>	1	2
Color Legend Reminde	er Due Date Task Going	Due Date Task Going T	Target Date Task Stuck	Due Date Task Stuck Ta	arget Date Hearing	Sub Task Target Date

All due dates of Task, Reminders & Hearings on single Calendar

Plan overtime / team priority

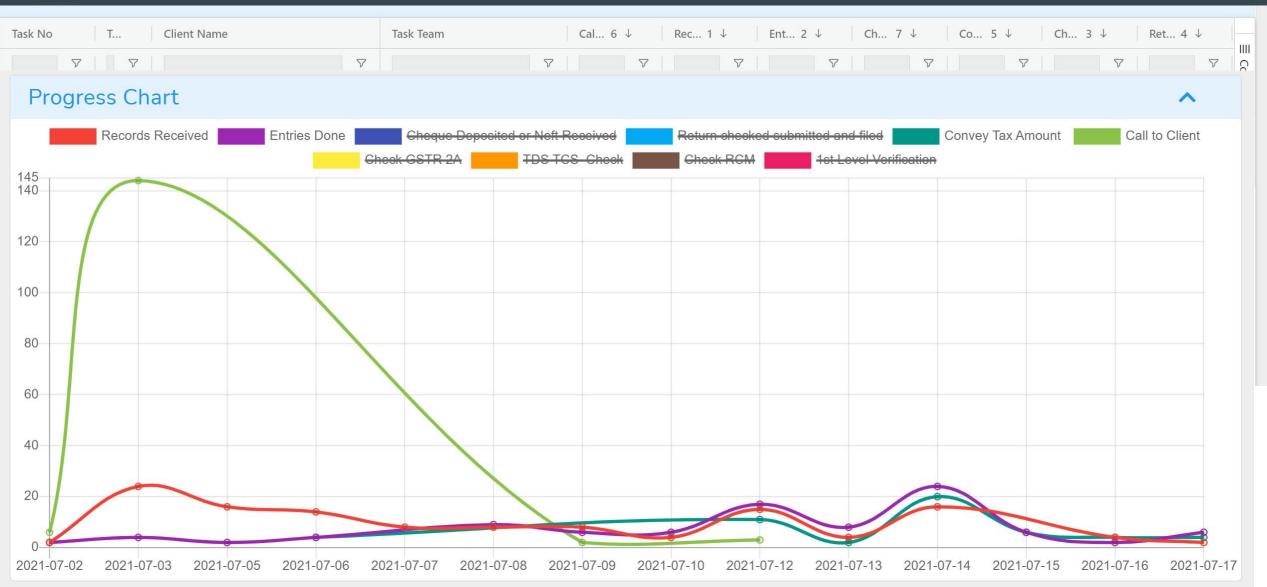


### Third level maturity

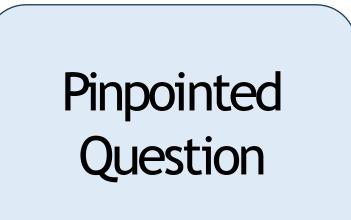








### Fourth level maturity

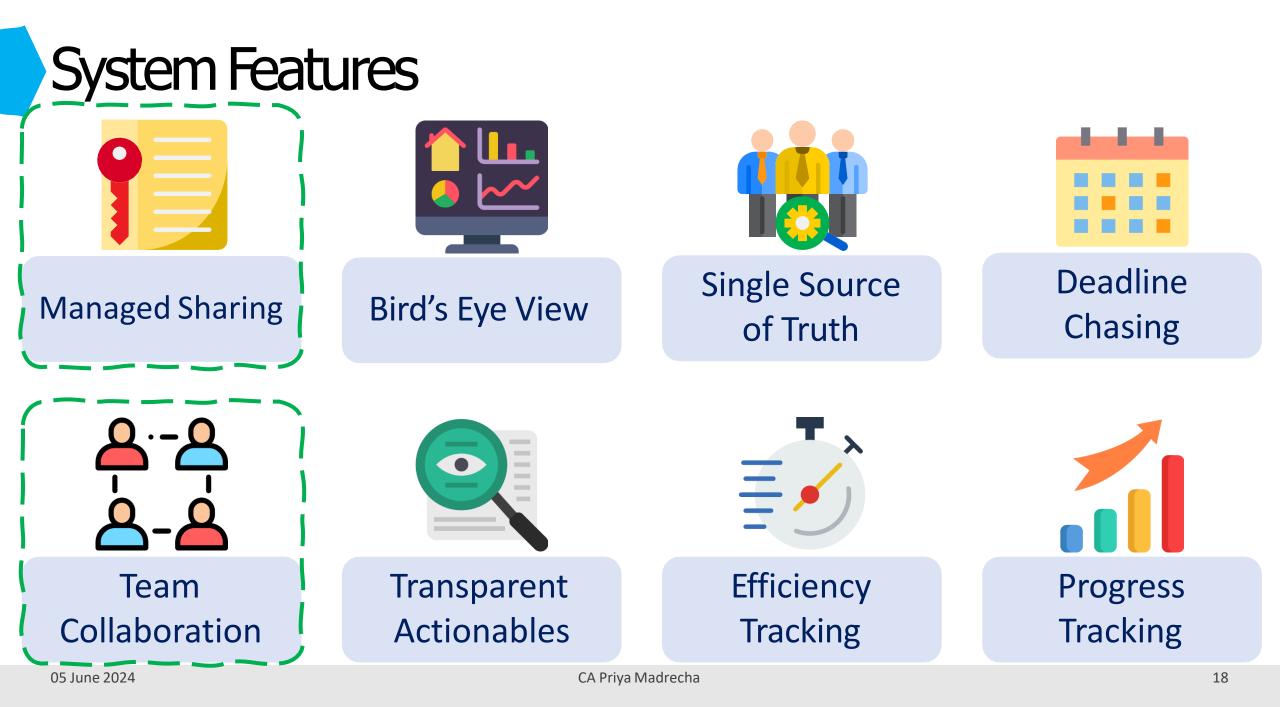




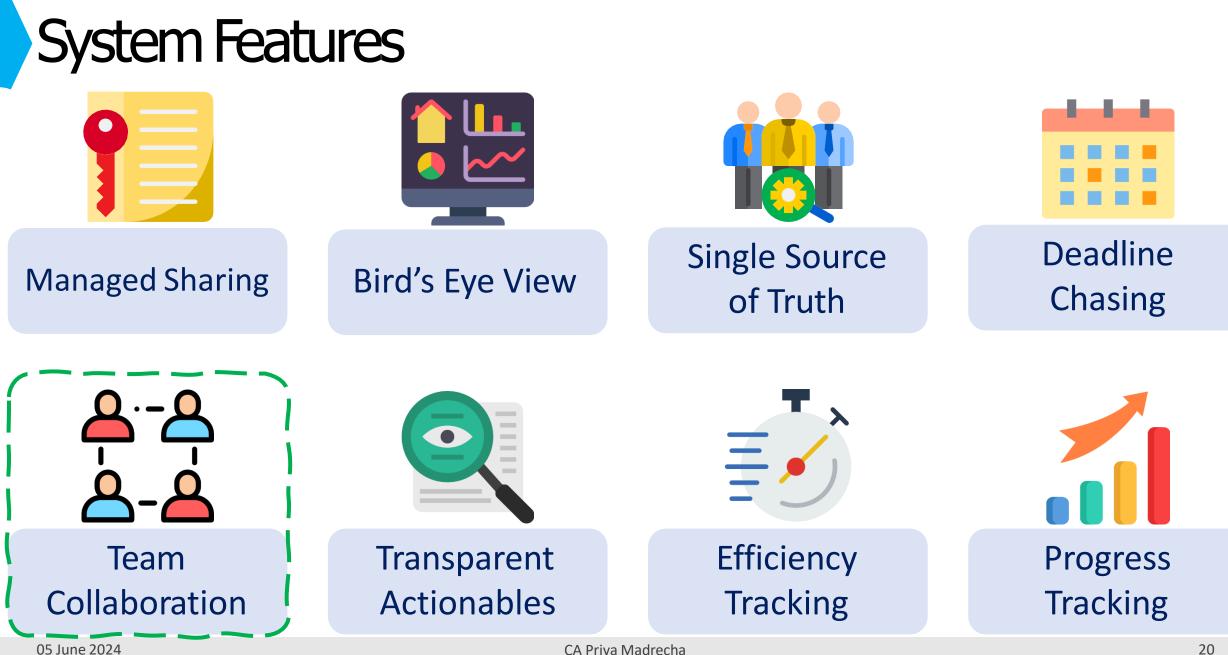
### Progress or logging behind?

#5 Task Stock				Category		From Date* ✓ 01 Jul 2021		To Date* 17 Jul 2021		62	5 °C° 1m 🕑
√ Filter Team m	ember's name										
AshwiniP		DhanashriJ		JanhaviKesa	rkar	KajaUadhav		KrutikaPatil		NityaS	
Opening*	165 0	Opening*	292 1	Opening*	158 0	Opening*	280 0	Opening*	31 0	Opening*	263 1
Assigned:	89 0	Assigned:	172 0	Assigned:	15 0	Assigned:	92 0	Assigned:	14 0	Assigned:	150 0
Completed:	65 0	Completed:	104 0	Completed:	21 0	Completed:	74 0	Completed:	10	Completed:	86 0
Pending:	189 0	Pending:	360 1	Pending:	152 0	Pending:	298 0	Pending:	44 0	Pending:	327 1
Items per page 8	$\checkmark$									Page 1 of 2	$\odot$
Color Legend	ask Sub Task										









CA Priya Madrecha

# The most difficult

## part



### Human Angle

drech



### Task tracking



✓ Every client work to be tracked
 ✓ Unique Identifier for each Task
 ✓ Dissect into smaller actions, if required







### Timesheet



✓ Charge hours to the task
 ✓ Every team member must follow this
 ✓ Waste of efforts without Analysis

😑 👬 Demo Account						+	• PriyaMam •
Client List > Client View ⑦							
C0373 Dalusingh Rajput Ashapura Electric Hardware	G335 Rajput Dalus	singh T			Nit	yaS PranaliSh	inde DhanashriJ
COMPLIANCE		DE PROFILE	ے PASSWC	RD	企 FILE UPLOAI	D C	
U Hour ₹ Cost						+ BULK	+ ADD 2
Y Accounting Apr 2016 - Mar 2100		1-2021 G	1-2020 G 40.36	1-2019 C 32.75	1-2018 C 29.75	1-2017 C 20.40	1-2016 C
<b>Q GSTR1</b> Apr 2019 - Dec 2100		Q1-2021 C 0.25	Q4-2020 C 0.50	Q3-2020 C 0.75	Q2-2020 C 0.30	Q1-2020 C 0.60	
M C GSTR3B Jun 2019 - Mar 2100		Aug-2021	Jul-2021	Jun-2021	May-2021	Mar-2020 C 3.11	Apr-2021
Y // IT Return Filling Apr 2016 - Mar 2100		1-2019 C 0.75	1-2018 C 2.50	1-2017 C	1-2016 C		
Y Profession Tax Individual Apr 2017 - Mar 2100		1-2021 G	1-2020	1-2019 C	1-2018 C		

Compare Time Charged



#### Attendance Analytics 🕜

Report Filter	From Date 01 Feb 2020	To Date 29 Feb 2020		🔀 30s 🚱
📧 💷 User Name 🛞			Drag here to set column labels	
Group	Present	Avg In Time		Pivot Mode
NityaS	25	10:03		Search
VaibhaviD	25	10:11		□ Search Cound of the search of the sear
AshwiniP	25	10:06		🗌 IIII Mobile No 📃
PranaliShinde	25	09:52		IIII Attendance Date     ▼       IIII Attendance Category     □
HasmitaPatel	8	09:54		□     IIII Attendance Category     □       □     IIII User Category     □
JanhaviK	25	10:18		User ProfitCenter
KajalJadhav	25	10:11		Client Category
ShilpiShreya	5			Client ProfitCenter
DhanashriJ	25	10:04		☐ IIII Month ✓ IIII Status ▾
SmrutiK	25	11:13		Row Groups
PoojaS	4	10:35		IIII User Name 🛞
AshokSir	25	10:44		
PriyaMam	25	10:44		Σ Values

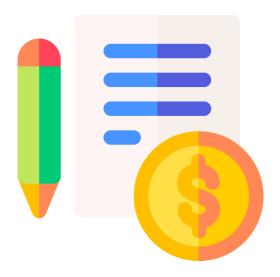
#### Excel like Pivot

### **Engagement Letter**



- Signed engagement letter for every work
   Legal protection
- ✓ Scope control

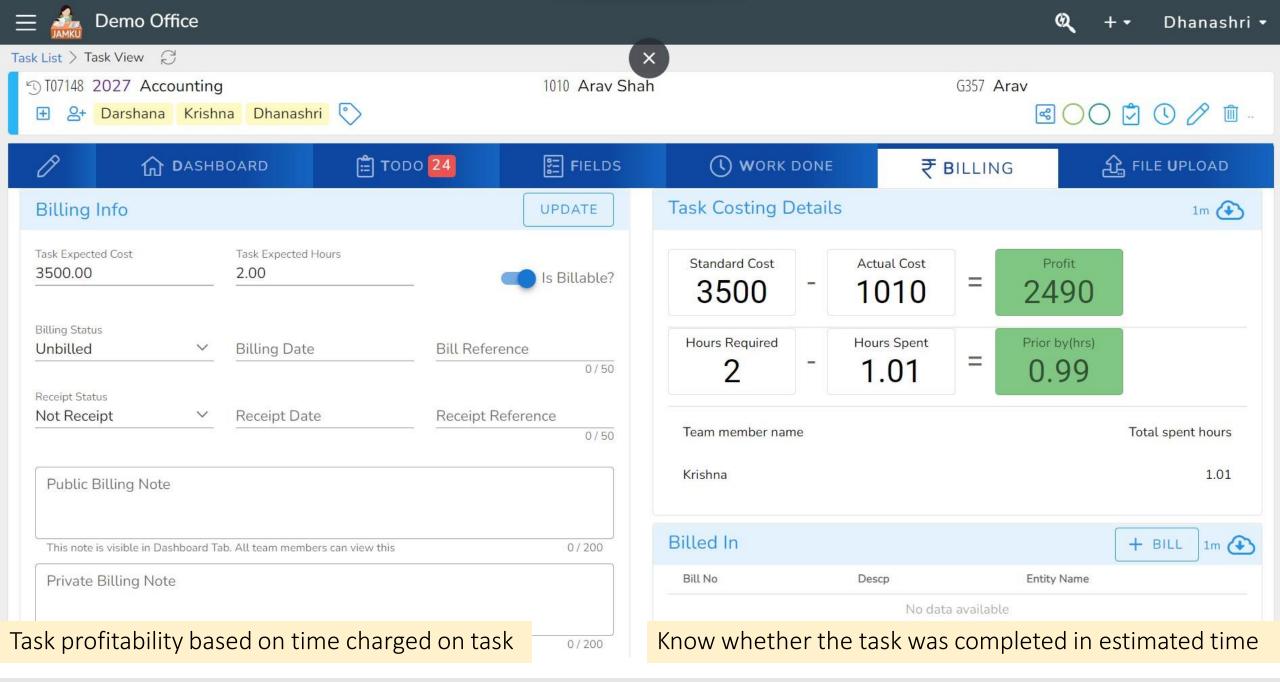
### How to decide fees?



- $\checkmark$  Time estimate
- $\checkmark$  Previous period time invested
- $\checkmark$  fiecovery rate

😑 👬 Demo Account						+	• PriyaMam •
Client List > Client View ⑦							
C0373 Dalusingh Rajput Ashapura Electric Hardware	G335 Rajput Dalus	singh T			Nit	yaS PranaliSh	inde DhanashriJ
COMPLIANCE		DE PROFILE	ے PASSWC	RD	企 FILE UPLOAI	D C	
U Hour ₹ Cost						+ BULK	+ ADD 2
Y Accounting Apr 2016 - Mar 2100		1-2021 G	1-2020 G 40.36	1-2019 C 32.75	1-2018 C 29.75	1-2017 C 20.40	1-2016 C
<b>Q GSTR1</b> Apr 2019 - Dec 2100		Q1-2021 C 0.25	Q4-2020 C 0.50	Q3-2020 C 0.75	Q2-2020 C 0.30	Q1-2020 C 0.60	
M C GSTR3B Jun 2019 - Mar 2100		Aug-2021	Jul-2021	Jun-2021	May-2021	Mar-2020 C 3.11	Apr-2021
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Y Profession Tax Individual Apr 2017 - Mar 2100		1-2021 G	1-2020	1-2019 C	1-2018 C		

Compare Time Charged



05 June 2024

### Fee collection tips



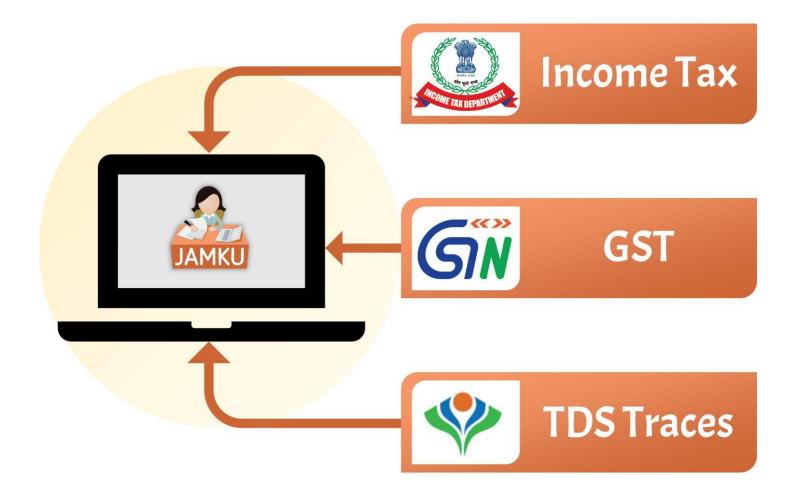
 Classify clients: Monthly, Quarterly
 Classify services: Periodic, On completion, Advance

✓ Billing activity - Weekly

### Automate tax notice tracking

#### portal.jamku.app

Uses fiPA to automate notice tracking across all tax portals



### Communication



✓ Mixes personal & office work
 ✓ Not suited for office communication
 ✓ Large Groups lead to loss of focus

### Communication



#### **Other Options**



- $\checkmark$  Created for team communication
- ✓ Permission management (Sensitive chats)
- ✓ Focus groups (called channel)
- ✓ Amazing search functionality
- $\checkmark$  Can completely replace team emails

### Common email for Office?

# G freshdesk Sicket

## Zendesk



# Thank You

#### Priya Madrecha CA, CS, BCOM

For being an Awesome Audience



Connect with me on

in

Or Email me

priya@madrecha.com

CA Priya Madrecha

Or WhatsApp Me

\*