

CA Desk

The Work Force of CA's Office



**An Office Administration & Work Management Software Application
Specially Crafted For Chartered Accountants**

THE CONCEPT

This software application maintains the complete details of Clients along with Work Portfolio of all the clients. i.e. Details of what types of work we are doing for that client. Then software will remind to collect the work documents in advance for that work when it dues i.e. Monthly/Quarterly/Half Yearly/Yearly.

It also maintains Work Management i.e. stage wise work assignment to employees, Update status by employees, Work Completed Register etc. thus giving you a clear cut idea of employee wise pending work and work done and also let you know the pending work to assign to the employees. You can get various reports like Work Done in Man Hours, Emp. wise, Client wise, Work Type wise Total Hours Worked.

Software can also maintain Work wise Documents and keeping soft copy of documents, so later on you can view documents & take printout of the same, instead of looking for Physical file.

It also maintains Billing Register & Receipt Register. So you can get Statement of A/c of Clients, Outstanding Register etc.

It will provide a plenty of reports that will assist you in planning & analysis.

THE FEATURES

- ❖ Maintains details of all the client i.e. File No., Name, Client Group, Address, Contact details, contact person, Bank Details, I.T. details like Status, Ward, PAN, DIN, TAN, Service Tax No., CIN, Reg. No. etc.
- ❖ Maintains details of all the Employees i.e. Employee Name, Address, Contact Details, Join Date, Designation, Ref. By etc.
- ❖ Maintains Master Register of Work Details i.e. Work Name, Work Category, Is that Work Frequent then frequency and reminder date, and all the various stages of that work.
- ❖ Maintains Client wise Work Portfolio, in that you can set various work of clients that we are doing regularly i.e. I.T. Return Filling, Audit etc. and from that the software will remind you that the particular work of that client is supposed to do.
- ❖ When you start any work of client, you can specify the date of start, expected completion date, priority of that work.
- ❖ You can also assign various stage wise works to an employee and specify the assign date, expected completion date, and remarks.
- ❖ Now you get the automatic list for your employees what work to do and later on status can be updated on completion of the stage with specifying completion date
- ❖ After completion of all the stages, you can mark that work as completed and then the software will maintains the Completed work register for you.
- ❖ You can issue Bill to your clients and maintain Billing Register. When payment received, you can give receipt from software. Thus Outstanding Register will automatically maintain for you. You can also print Statement of A/c to Clients.

- ❖ You can also maintain work wise document register. In this you can attach soft copy of the documents with Work Register. So you need not to keep physical file of clients. Whenever you required any documents, you can view & take print out of the document from the software without looking for physical file location.
- ❖ You can also make your employee to entry Daily Work Done i.e. Client wise, Work wise or General Office Work and hence get the various reports on Emp. wise Man hours worked for specific Client or for specific Work Type.

THE REPORTS

- ❖ Current Work Status
- ❖ Employee Wise Work To Do
- ❖ Work To do
 - Work Wise / Work Category Wise
 - Client Wise / Client Group Wise
 - Work Stage Wise
 - Employee Wise
 - Assign Date Wise
 - Expected Completion Date Wise
 - Priority Wise
 - Work Not Assigned to Employee
- ❖ Work Portfolio (Regular Work List)
 - Client wise / Client Group wise
 - Work wise / Work Category wise
- ❖ Period wise Reminder of Regular Work
- ❖ Work Completed Register
 - Client wise
 - Client Group wise
 - Work wise
 - Work Category wise
- ❖ Work Done Register
 - Emp. wise man hours worked
 - Client wise man hours worked
 - Work Type wise man hours worked
 - Man hours spent after General Office Work
- ❖ Clients Register
- ❖ Address on Label & Envelop Printing Facility
- ❖ And Many More...

Ways Interactive

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