BENCHMARK COMPUTER SOLUTIONS LTD.
Make *IT* Simple

CA SUITE

workflow management

Chartered Accountant Product feature

This product is basically for a Chartered Accountant, who has multiple CA's working in their organisation for their multiple clients. This cloud based will help to track all the contracts with their clients, manage their deliverables timely, moreover help in allocating CAs to these contracts with standard policies, and ownerships. The platform also allows the CAs to record their timesheet against each contract, and the travelling expenses, both are then approved by the concerned authority. For tracking and monitoring the knowledge of the CAs, modules related to training and MCQ tests are also available in this system. Role and User basis access control for the appropriate feature access of the product.

Client setup

1 This involves the process of setting up new clients within the system. It includes entering client details such as name, contact information, billing details, and other relevant information needed for client management.

Employee Setup:

2 Employee setup for adding new employees to the system. This includes entering employee information such as name, contact details, role, department, and any other necessary details for employee management.

Role-wise Access:

3 Role-wise access for assigning specific access permissions to different roles within the organization. This ensures that employees only have access to the information and functionalities relevant to their role.

User-wise Access:

4 Similar to role-wise access, user-wise access involves assigning specific access permissions to individual users based on their job responsibilities and requirements.

Dashboard:

5 The dashboard provides a summarized view of key metrics, tasks, and activities relevant to the user's role. It serves as a central hub for accessing important information and functionalities within the system.

Financial Year Setup:

6 This involves configuring the financial year within the system. It includes setting the start and end dates of the financial year.

Checklist Setup:

7 Checklist setup involves creating and configuring checklists that need to be followed for different processes or tasks within the organization.

Template Setup:

8 Template setup involves creating and configuring templates for various audit types executed by the organization.

Engagement Allocation:

9 Engagement allocation involves assigning employees or teams to specific client engagements or projects based on their skills, availability, with start and expected closure date .

Client Engagement Creation / Team Creation / Allocate Template:

10 This involves the process of creating new client engagements, creating teams to work on these engagements, and allocating templates or checklists to be used for the engagement.

Update Checklist:

11 Authorise users assigns the task, and updates the checklist details.

Review Checklist:

12 Reviewing checklists involves evaluating completed checklists to ensure that all necessary tasks have been completed correctly and according to the established procedures.

Engagement Closure:

13 Engagement closure involves completing all necessary tasks and documentation at the end of a client engagement, ensuring that all deliverables have been met and the engagement is formally closed.

Timesheet Management:

14 Timesheet management involves tracking and managing employees' work hours, against the allocated engagement.

Timesheet Approval / Rejection:

15 Timesheet approval/rejection involves reviewing and either approving or rejecting employees' timesheets based on accuracy, completeness, and compliance with company policies.

Expense Management:

16 Expense management involves tracking and managing employee expenses, including uploading supporting documents such as receipts or invoices.

Expense Approval / Rejection:

17 Expense approval/rejection involves reviewing and either approving or rejecting employees' expense claims based on validity, policy compliance, and budget considerations.

Leave Management:

18 Leave management involves tracking and managing employees' leave requests, including vacation time, sick leave, and other types of time off.

Leave Approval / Rejection:

19 Leave approval/rejection involves reviewing and either approving or rejecting employees' leave requests based on actors such as staffing needs, workload, and company policies.

Training Management:

20 Training management involves tracking and managing employees' training activities, including scheduling training sessions, tracking completion, and assessing effectiveness.

Training Approval / Rejection:

21 Training approval/rejection involves reviewing and eitherapproving or rejecting the training taken by the employees'.

MCQ Test:

22 MCQ (Multiple Choice Question) tests involve administering quizzes or assessments with multiple-choice questions to evaluate employees' knowledge or skills on specific topics.

Reports:

Reports provide detailed insights and analysis based on various data captured within the system. The reports listed include:

- **Client Engagement Audit Report:** Provides an audit trail of activities and changes related to client engagements.
- **Client Engagement Status Report:** Provides an overview of the current status of client engagements, including progress, milestones, and any issues.
- **Client Engagement Closure Report:** Summarizes the outcomes and key metrics of closed client engagements.
- **Timesheet Report:** Provides a summary of employees' recorded work hours.
- **Expense Report:** Provides a summary of employee expenses, including categories, amounts, and supporting documentation.
- **Leave Report:** Provides an overview of employees' leave usage, and history of leave requests.
- **Training Report:** Provides insights into employees' training activities, including completed courses.
- **MCQ Report:** Summarizes the results of MCQ tests, including individual performance.

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