SIMPLIFY PRACTICE

Contact Details

Website Information – www.simplifypractice.com

Support Id – support@simplifypractice.com

Toll Free - 18001038489

INTRODUCTION ON SIMPLIFY PRACTICE.

- Simplify Practice has started from 2018 October onwards with a Mou Signed with ICAI.
- The MOU provides software free of cost from 2018 till 2020 Oct.
- We as a company have rich Experience in BFSI sector and our product includes ERP,CRM,WMS and HRMS Software Solutions.
- Vritti Sol. Pvt Ltd started in 2007 and has a PAN India presence.
- We have been serving as consultants to SME's , Private co. and government sector companies.
- The company has 400+ employees and 10000+ different clients .
- The company has been awarded like ET brand Equity award in 2019, Indian ISV Award 2019 for Best ERP Solutions of the year.

REASONS TO GO WITH SIMPLIFY PRACTICE NOW

SIMPLIFY PRACTICE
WE MAKE WORK EASY

- During this pandemic work management software will help you to keep track of your work and employees .
- Work from home has become need of the hour with which every sector of professionals has to get habitual .
- The main reason to go with simplify practice is that it saves time.
- During the past 6 Months we have been able to have a steady growth and able to keep in constant touch with client.
- The growth of clients have been 25% in 3 months and activity counts per average employee has increased from 6 to 8.5 per week.

WHAT IS SIMPLIFY PRACTICE?

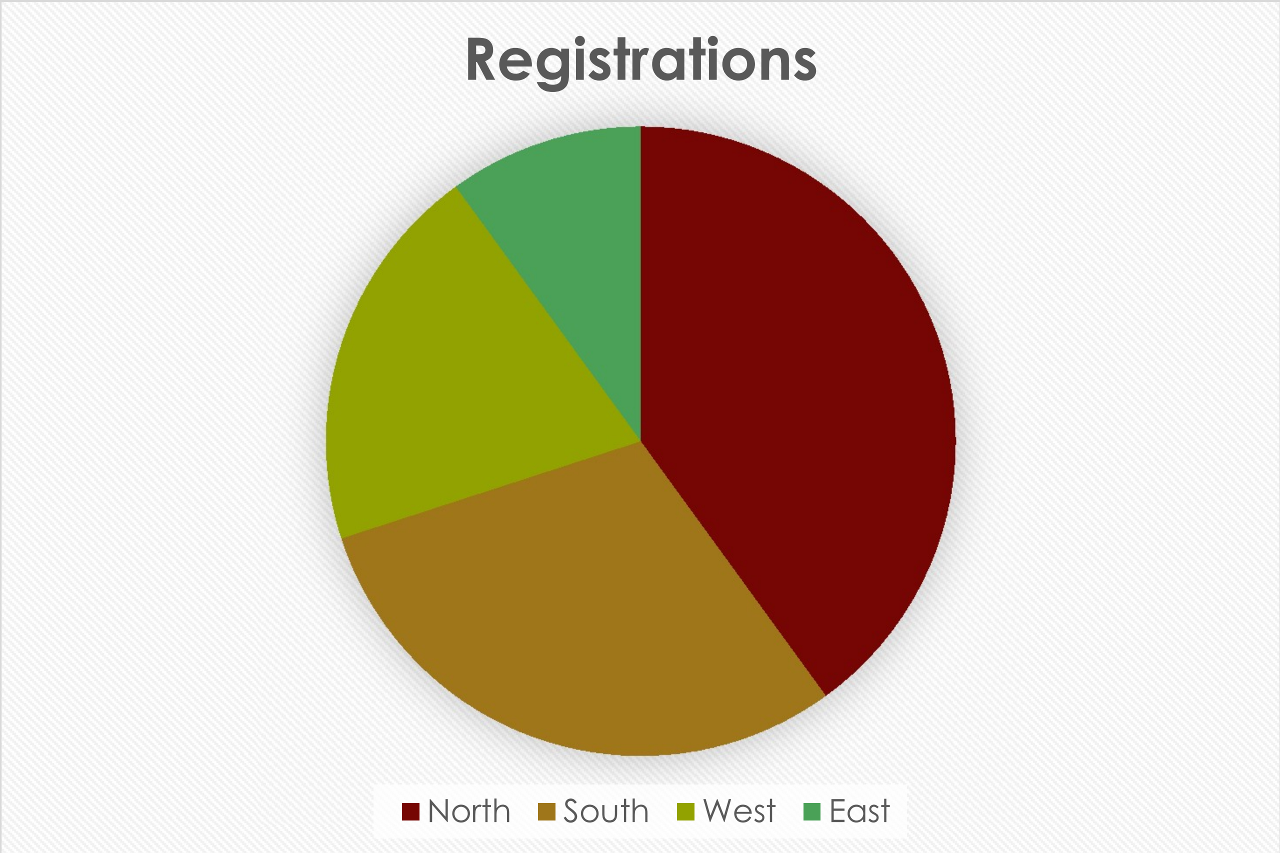
SIMPLIFY PRACTICE
WE MAKE WORK EASY

- It is a practice management tool.
- Android based Mobile Application Available.
- We track the location of an on field employee.
- We can get profitability report on a click.
- Practice Management provides an end-to-end solution and acts aa a information hub related to work assignment for CAs .
- It helps in synchronizing and automating multiple process. We can get the records of the work done by the article in a day.
- We can assign opportunities to the sales executive once an prospect comes for an enquiry.
- .

Registration Statistics in 9 Months

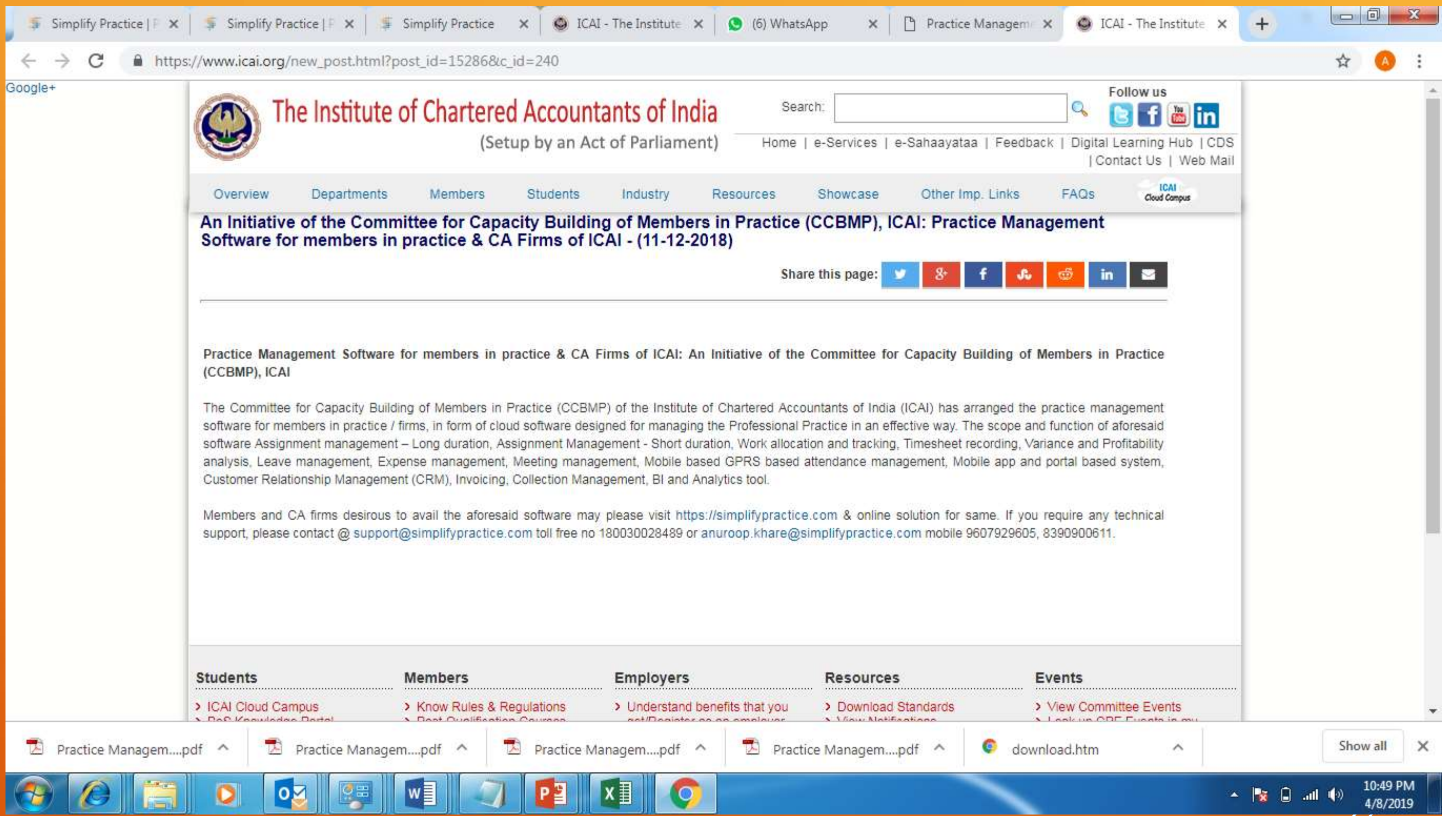
Month	Number of registered users
November	130
December	103
January	369
February	115
March	81
April	129
May	198
June	258
July	306
Total registration	5829till th July 2020

Region Wise Registrations on Simplify Practice

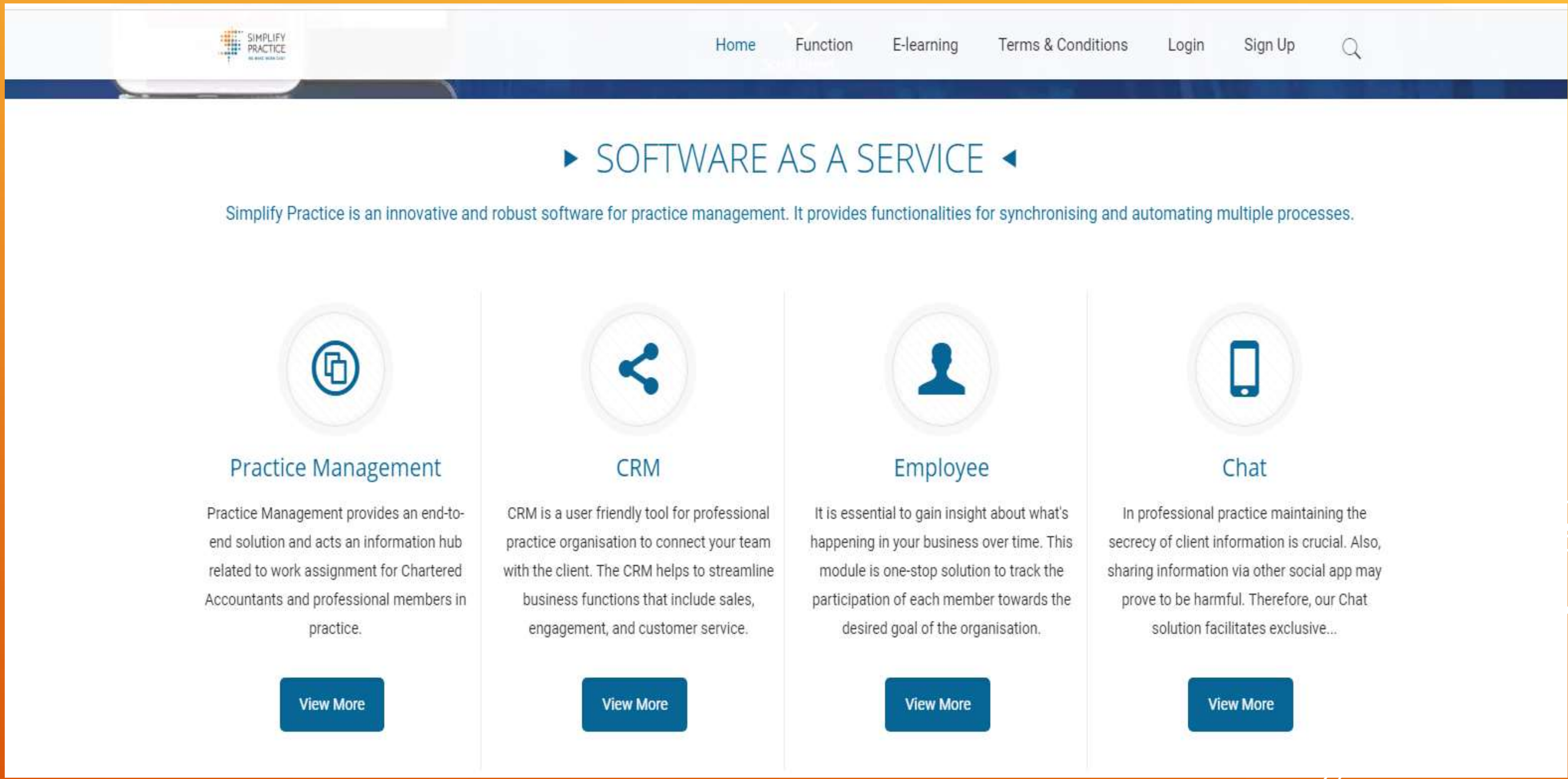


We have a presence in all 29 States currently.

SIMPLIFY PRACTICE PRESENCE ON ICAI WEBSITE



Modules covered in Simplify Practice



How Work is Managed In Software

SIMPLIFY PRACTICE
WE MAKE WORK EASY

THREE THINGS WE DO BEST IN PRACTICE MANAGEMENT

LARGE ASSIGNMENT

It deals with assignment complex in nature and process, either on cost, time or effort estimation.This module is designed to generate, update and track end-to-end processes, activities and tasks along with the team and its performance.

MEDIUM ASSIGNMENT

It deals with assignments that involve less processes and not at all complex in nature. It can be implemented for assignments with lower estimation either on cost, time or effort.

SMALL ASSIGNMENT

It's a task-based assignment that contributes to keep track of clients' requirements. It provides in-depth insight into the client's requirement, resolutions status, and performance analysis.

Task Management in the software.

SIMPLIFY PRACTICE
WE MAKE WORK EASY

▸ EMPLOYEE MANAGEMENT ◂

Task and Time

- Create, Update and Manage Task
- Visibility of Task
- Employee & Assigned Task Register
- Task Status Report

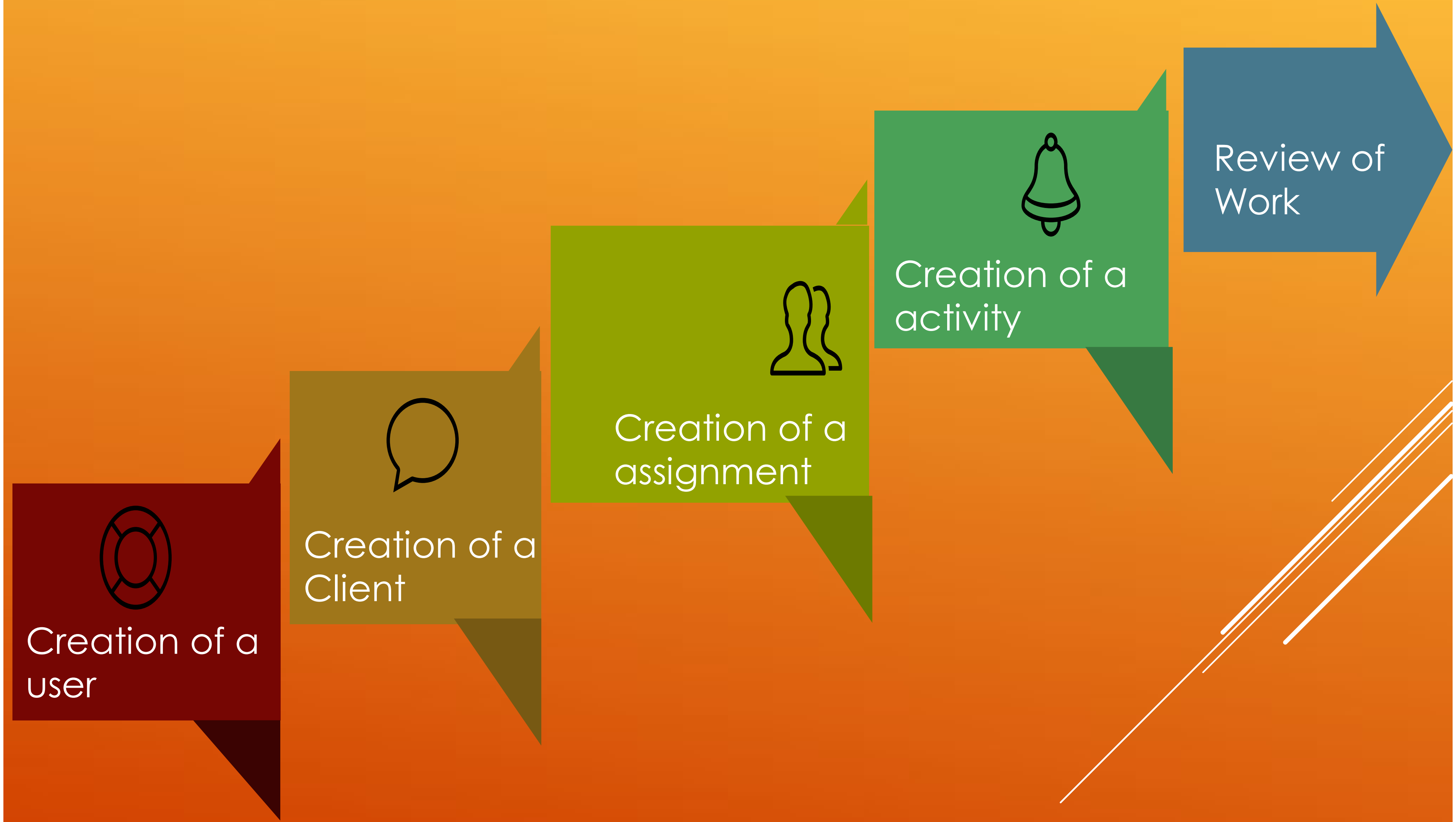
Attendance

- Biometric-based Attendance
- GPS-based Attendance
- Update and Manage Timesheet
- Leave & Holiday Management

Expenses

- Create, Update and Manage Travel Claim
- Generate Travel Advance Request
- Geo Map-based Distance Computation

5 Initial steps on Simplify Practice



Report Preparation in the software

SIMPLIFY PRACTICE
WE MAKE WORK EASY

BI REPORTS

BI Report is auto-generated analytics and reporting tool. With one click, it helps to create dynamic dashboards and reports. It enables to generate reports of complex data. You can gain instant insights on varied activities being performed. BI Reports helps with data-driven decision making. Moreover, this tool allows you to govern the KPIs and actual performance of the team. Also, this tool provides detailed analysis of ROI for each assignment. The BI Report is the motivational factor to your team to take quick steps toward improving results. Highlights of this tool:

- Personalized and Interactive Dashboard
- Complex Data Analysis
- Easy Reporting
- Decision Making Support
- Anytime, anywhere

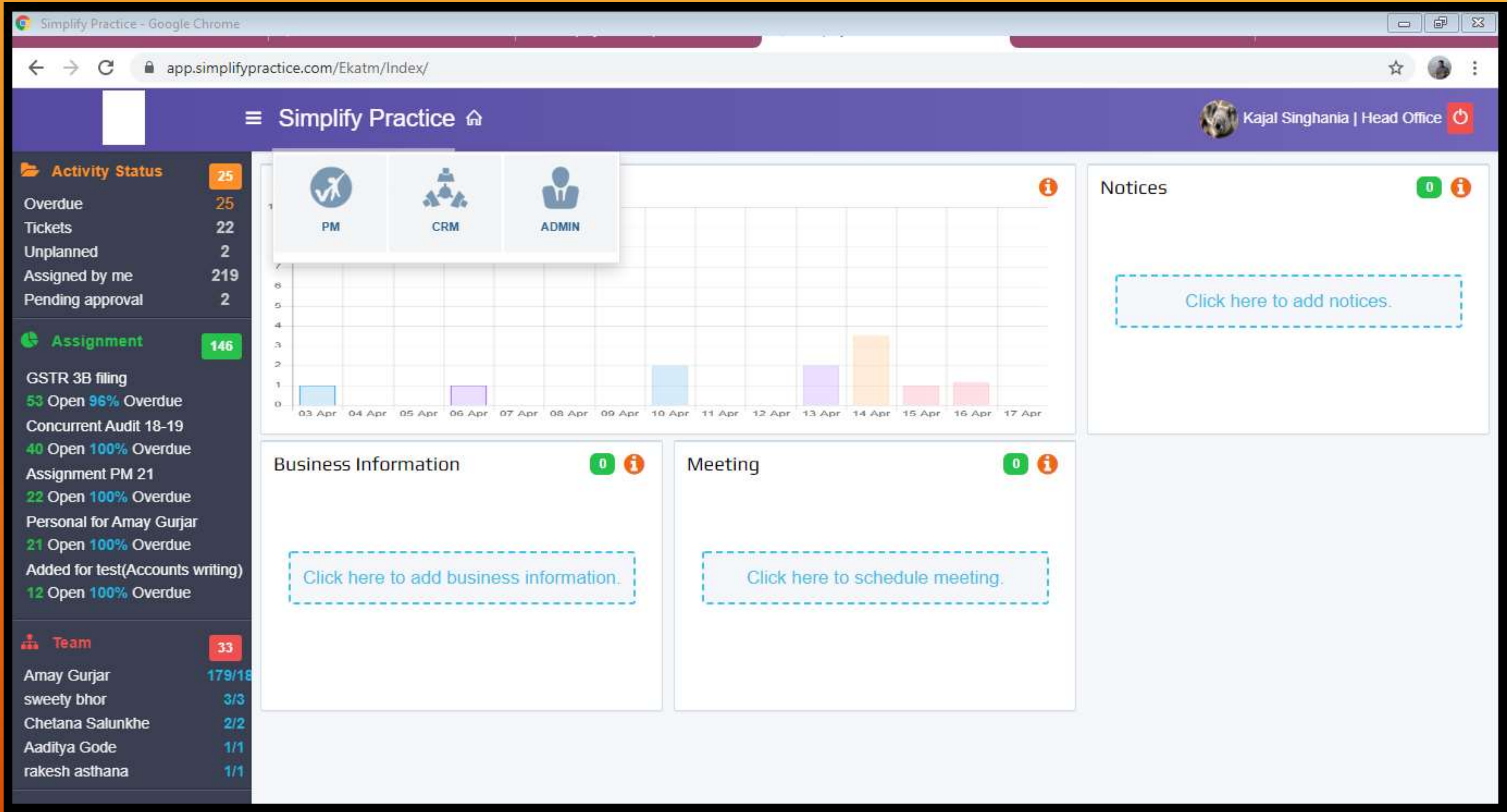
Training Program Of Simplify Practice

The 3 Stages of Programs Conducted

- Self Learning
- Instructor led Learning
- Customised Learning

SIMPLIFY PRACTICE
WE MAKE WORK EASY

Here you can find the three modules of simplify practice in the below screenshot

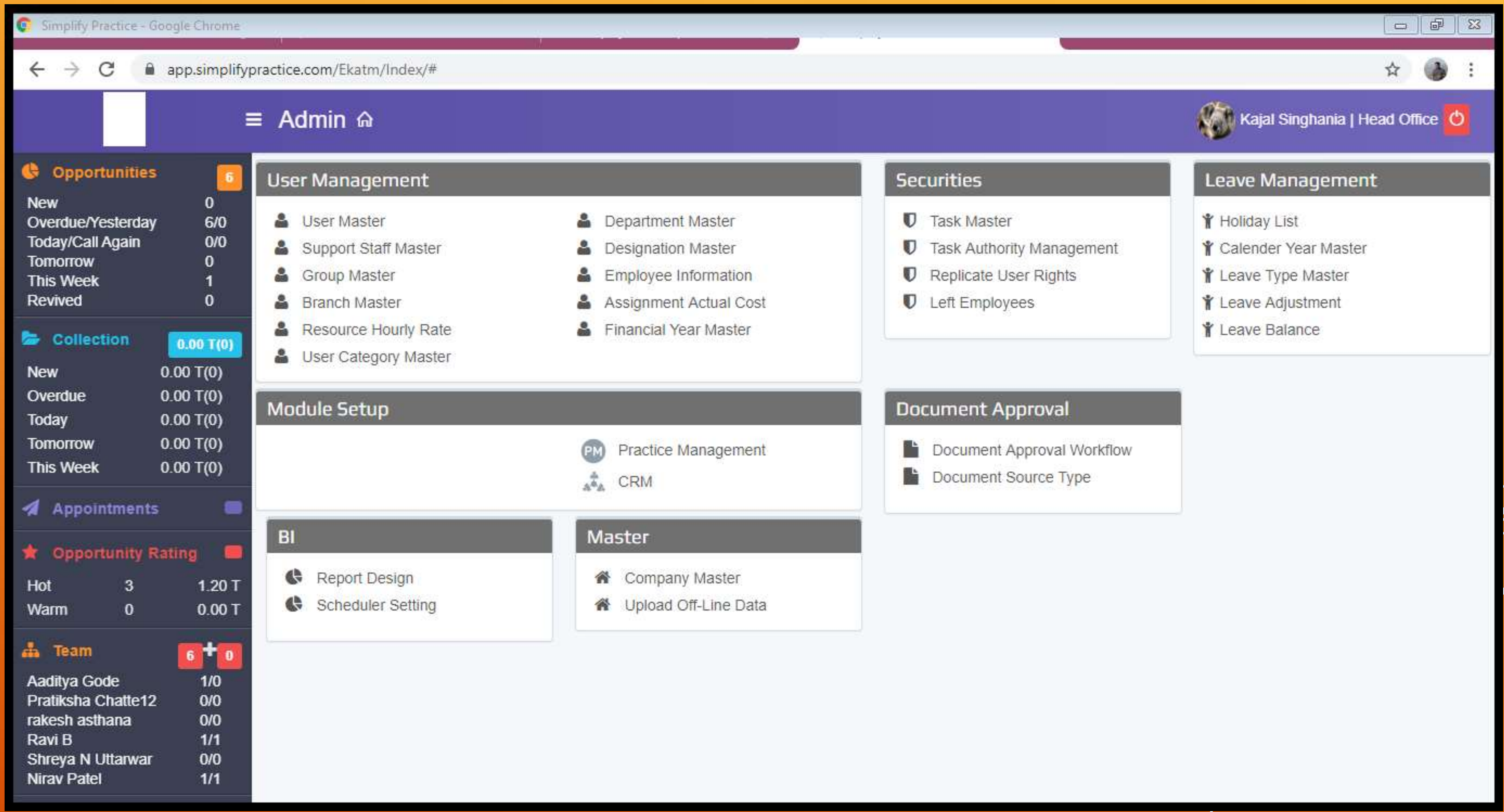


Features of Admin

- Creation of new user.
- Creation of groups.
- Creation of Branches.
- We can define resource hourly rate.
- Employee information.
- Setting financial year.
- Securities.
- Leave management.
- Upload Offline data.

This are some of the features which are present in the admin module.

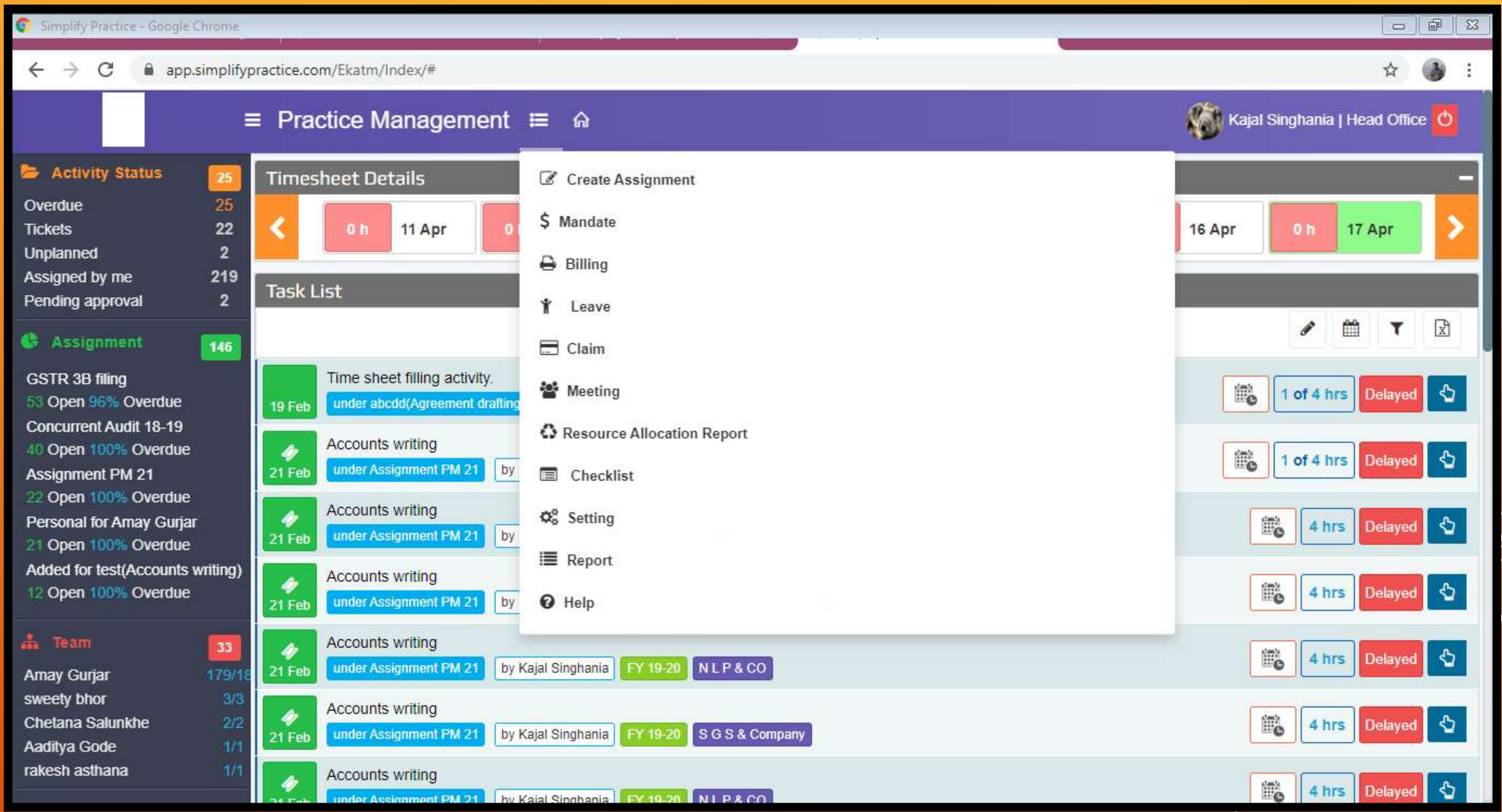
This is the admin page in simplify practice.



Features of Practice management

- Create Assignments
- Create activities.
- Timesheet filling.
- Reports
- Leave workflow
- Claims

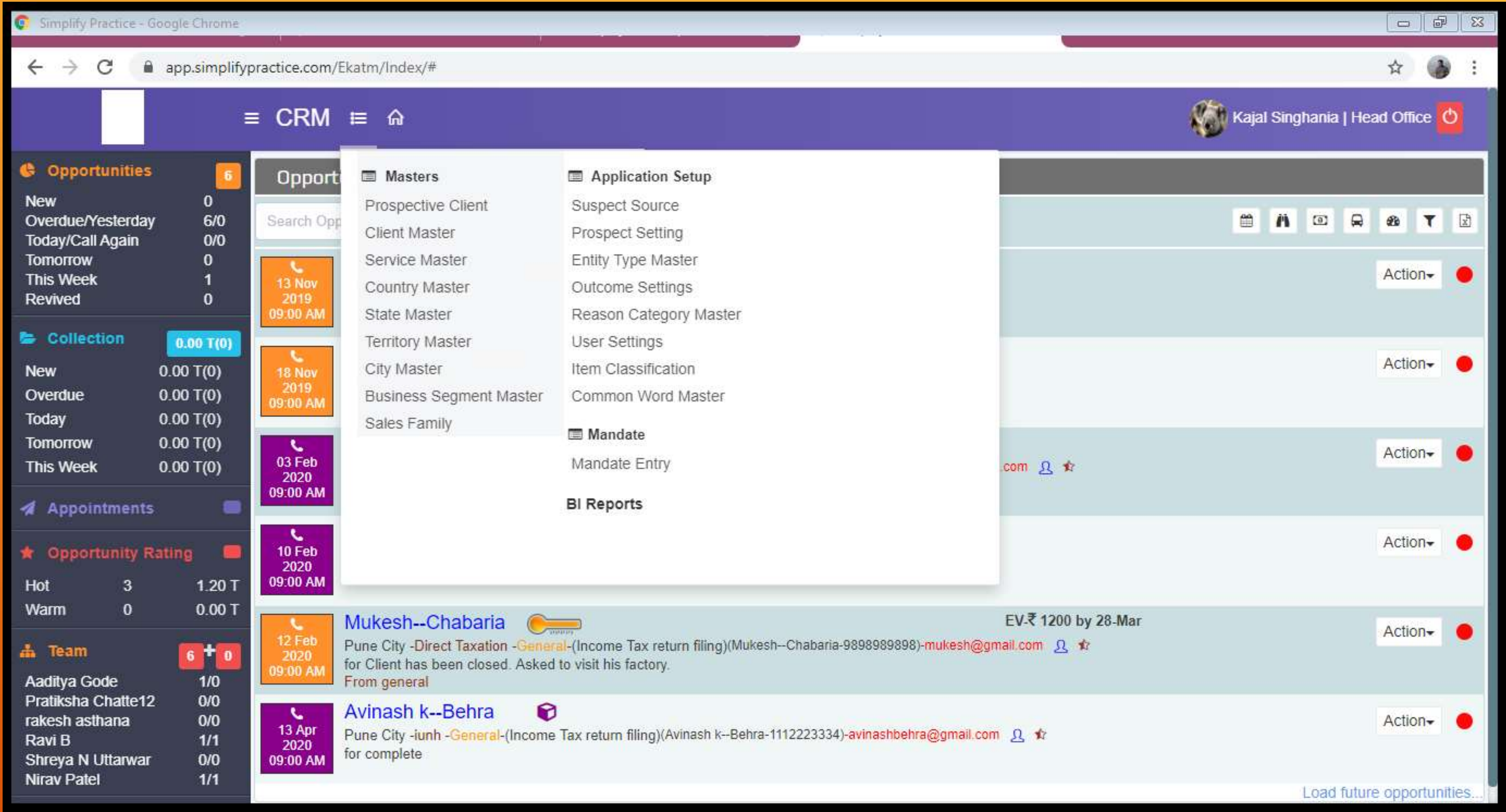
This is the page of practice management in simplify practice



Features of Customer Relationship management

- Entering Data of Prospective clients
- Client creation
- Assigning opportunities
- Updating existing opportunities
- Creating State
- Creating Country
- Creating City
- Creating Territory
- Creating Sales family

This is the page of CRM module in simplify practice



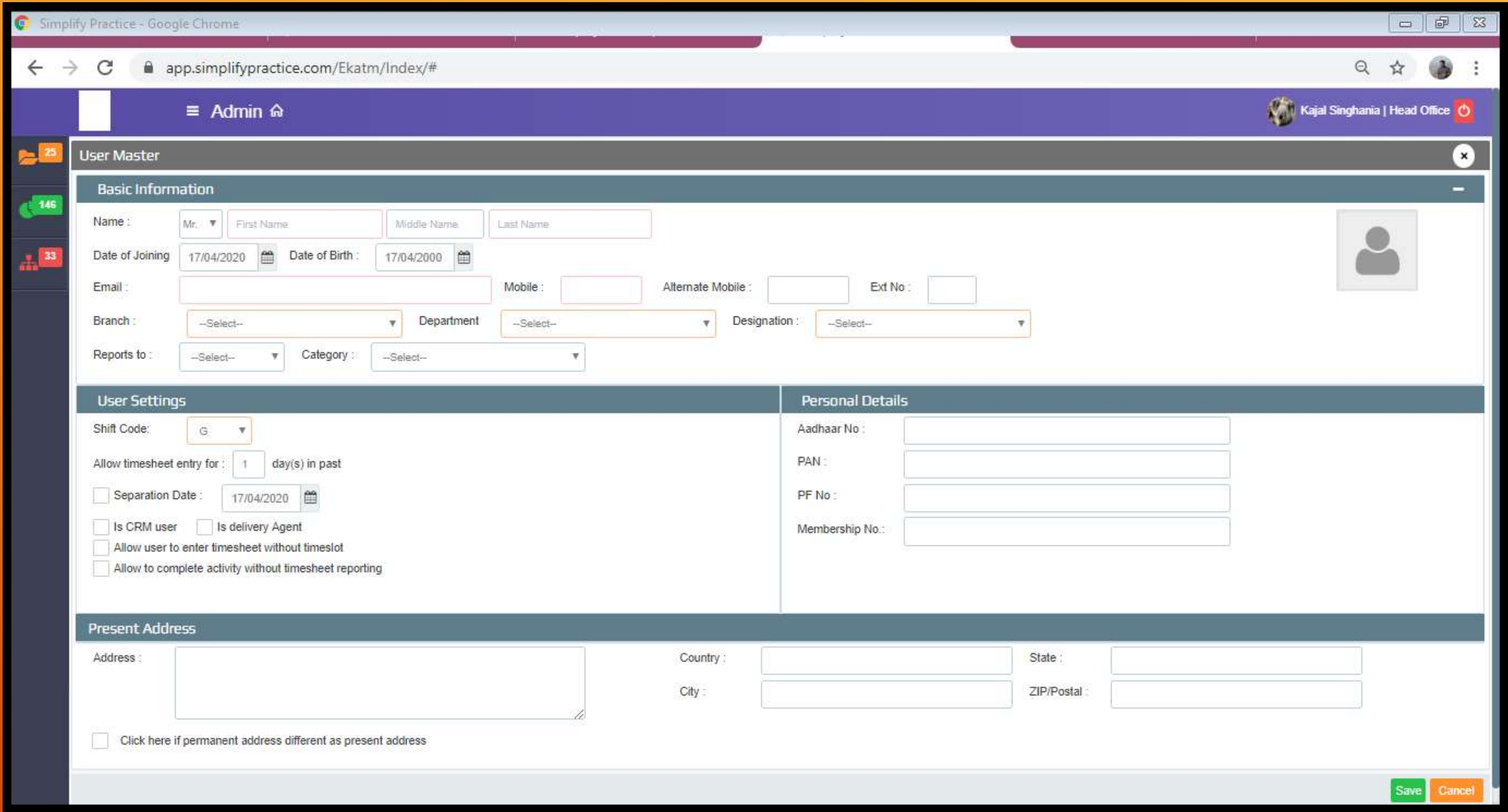
HOW USERS ARE ADDED

After getting credentials we have to add users in the software.

The steps of adding new user are as follow.

1. Admin → User masters → Enter the information of the user
2. Mobile number and email id should be unique for every user
3. Red color indicates compulsory field.

Below screenshot is the page of adding new user (User Master)



Once the user is created we need to create clients.

For creating clients we need to follow below given steps

CRM module→ Click on submenu→ Client Master→ Add→ Enter the basic details of the client.

We can also attach the attachments.

Click on save and move to the location.

Enter the location details, the details which are filled in the clients basic information that
Data will reflect automatically in location section

In territory select Main territory.

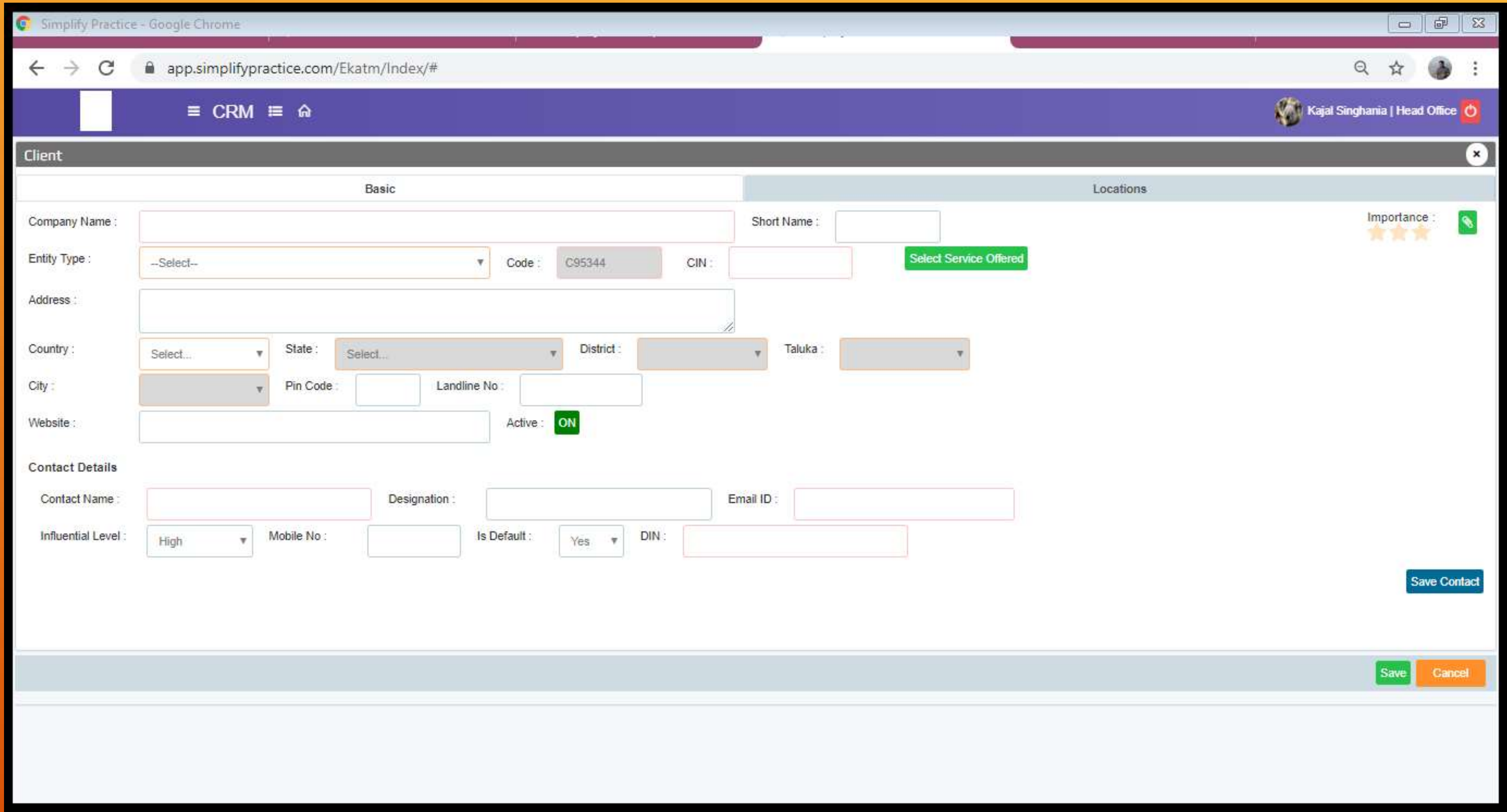
After entering GST no click on verify as the system will verify whether the entered format is proper or not.

Then click on save by filling the complete information.

SIMPLIFY PRACTICE

WE MAKE WORK EASY

This is the page for adding new client basic data



Importing the clients data .

Steps to import multiple client data in one go:

Admin module→ Upload offline data

While importing the code's first letter should be capital.

All the entered fields should be of same format which are in the systems master tables.

Ex: State: Maharashtra –While importing state we will have to enter same state format

Now as the creating of User and client has been completed we will be creating assignments

Below are the steps for creating assignments:

PM Module→ click on submenu→ Create assignment

He**ader**

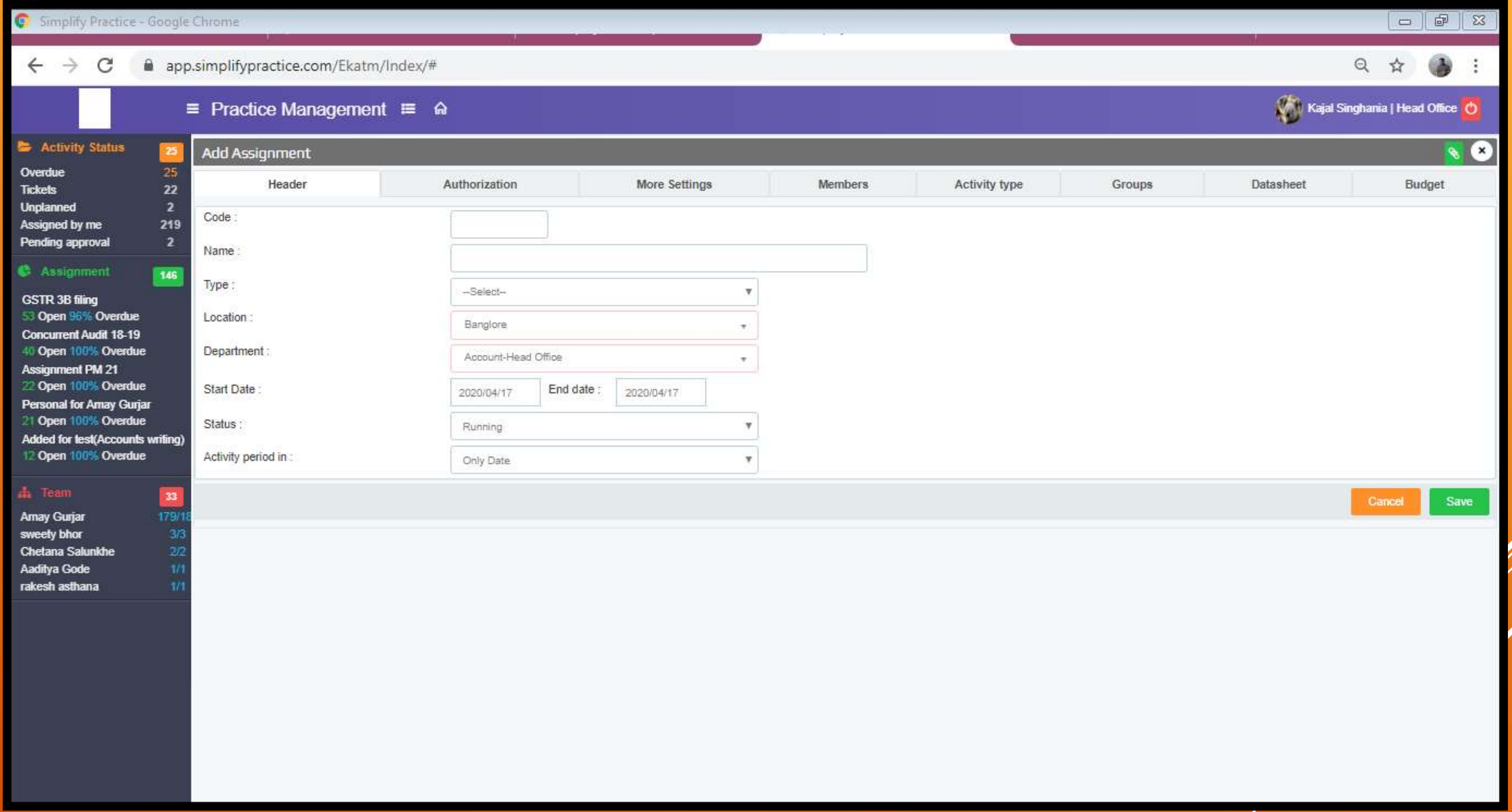
Code: Code pattern is not specific. It can be any code as per the choice.

Name: Assignment Name (Enter the financial year in the end of the name as some assignments are carried for year so its easy to track by the name itself if financial year is entered).

Type: The type of assignment

Location: Head office location to be entered.

From here we can create an assignment



Create Activity:

Below are the steps given to create an activity.

1.Click on assignment in which the activity is to be created.

2.Click on the assign work option(Pencil symbol) to add activity in that assignment.

3.Enter the description ,financial year and the priority.

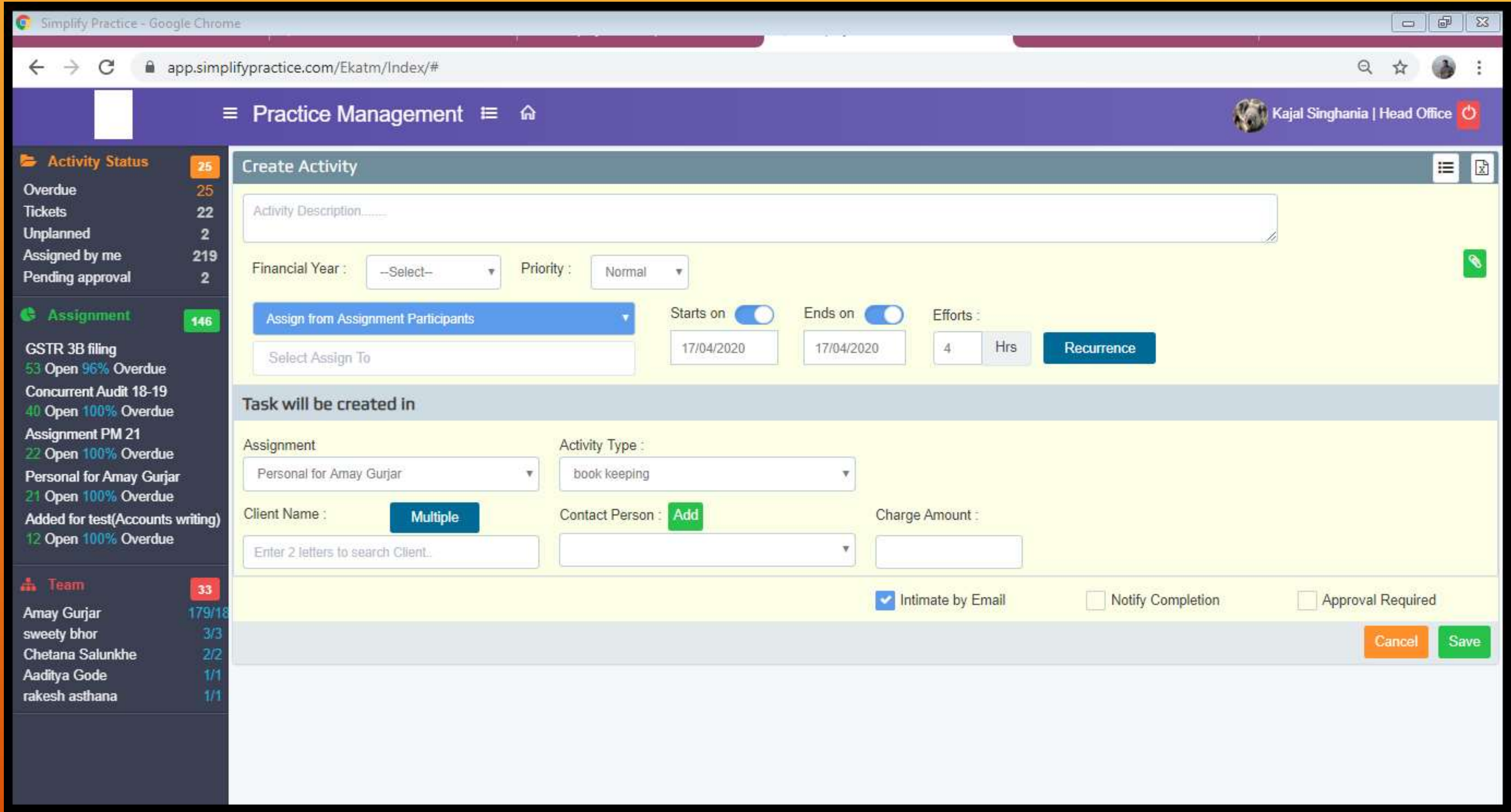
4. Recurrence: With this feature automatically the activity will get generated every month/week/year.

There is an attachment option available for attaching any file related to the activity.

Separate row will come in status as per the priority.

We can also select multiple client for single activity

This is the page from where we can create activity.



To review the assignments which are present in the status bar kindly follow the below
 given steps

*Click on assignments

*All the assignments which are assigned will be visible.

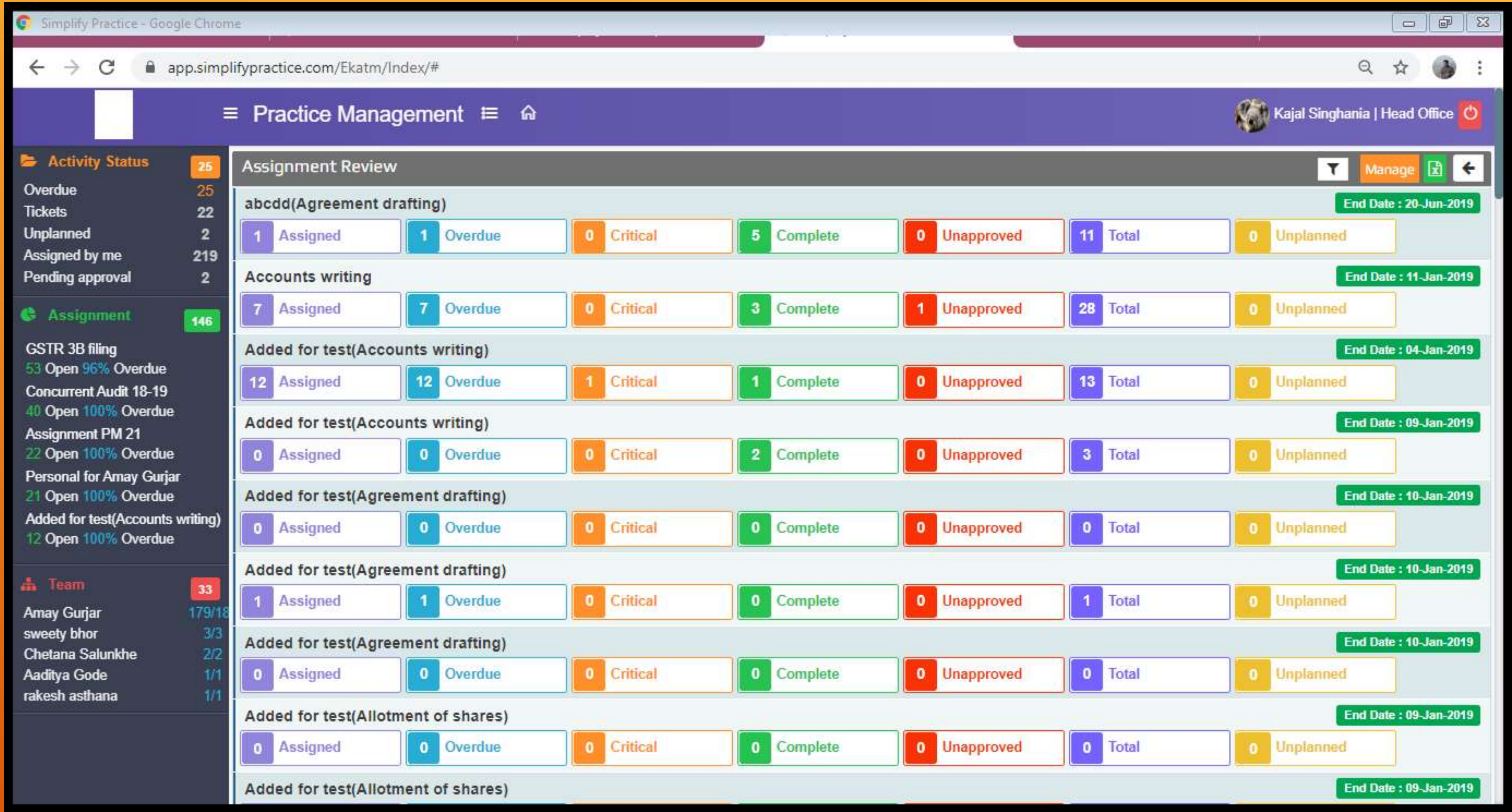
*We can also see the status of the activity from here.

*We can reschedule the activity.

*We can cancel the activity.

*All this can be carried out with the action button which is present besides the activity.

This page will display all the assignments and the status of activities



On the left side we can find the status bar which includes Activity Statu
Assignments and Team.

Customer Relationship management:

To create a prospective client kindly follow the below given steps:

CRM Module→ Submenu→ Prospective client→ Add new Prospect

Firm name: Name of the company

Firm alias: Alias of the company

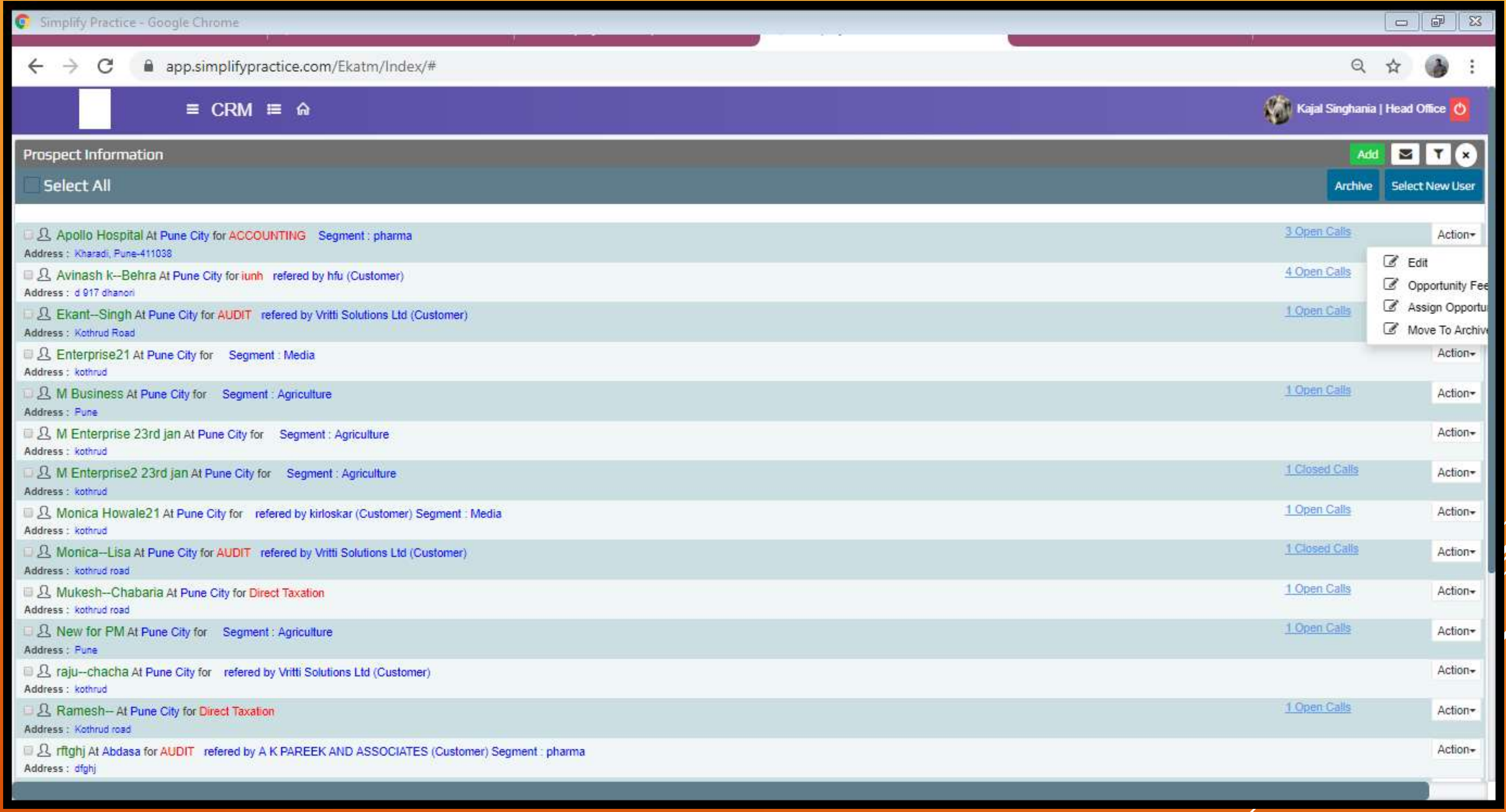
Address: Address of the company

Source of Prospect: From where did the prospect got to know.

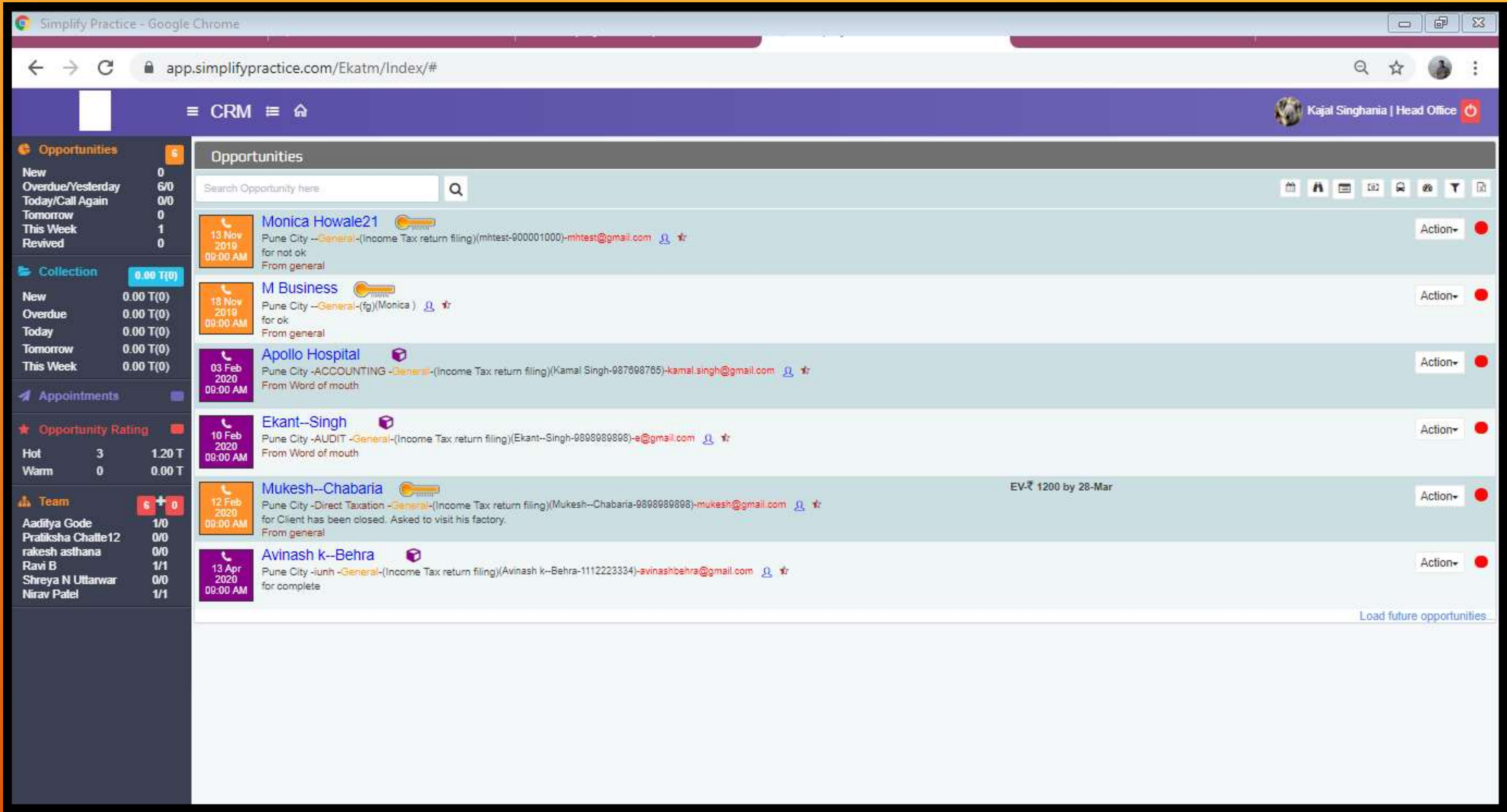
Enter the contact details (As the contact details are required for follo

Fill the Profile and enter the sales family interest.

Assigning opportunity Opportunity.



This is the page from where we can find the assigned opportunities.

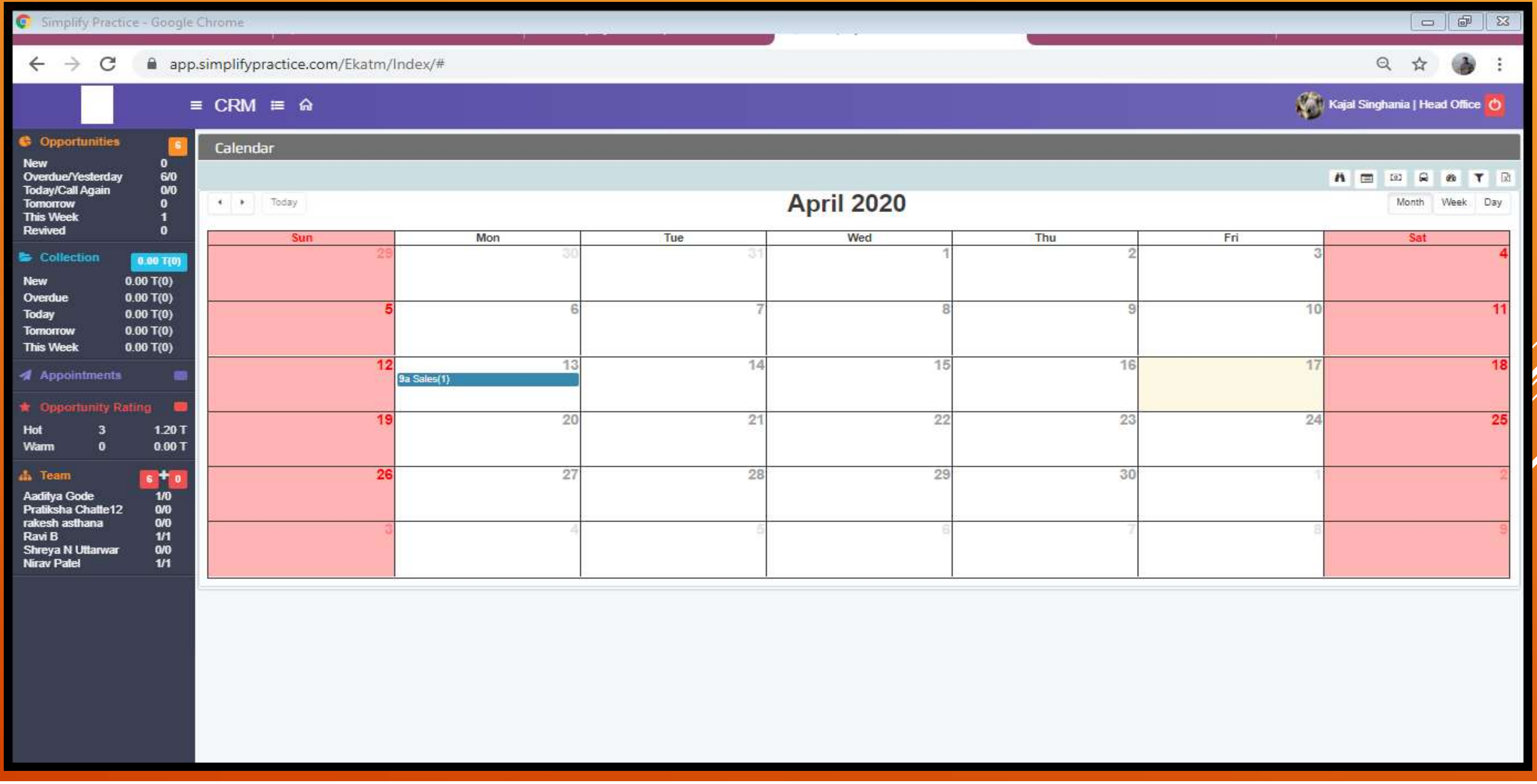


In the left side you will find Opportunities, collections, appointment, Opportunity rate and Team.

Calendar:

We have one feature in which there is a calendar date wise and it will show the schedule of the activities.

This feature help us in knowing the task which are to be performed today.



Our Testimonials

NEELESH JAIN & ASSOCIATES
Chartered Accountants
90040 96129

Surya CHS, Room No. 12, 2nd Floor, Building-2, Behind MGM Hospital, Sector-3, Vashi, Navi Mumbai - 400 703.
neelesh.jain9@gmail.com

Date: 20th July 2017

Mr. Anuroop Khare
Senior Manager - Enterprise Sales
Vritti Solutions Limited
201, Kalpataru Plaza,
Chincholi Bunder Road,
Malad, Mumbai 400 064

Ref: **Letter of Appreciation**

We **NEELESH JAIN & ASSOCIATES**, Chartered Accountant firm are using CA software **"vWorkbench"** provided by vritti solution limited. We found software user friendly and convenient.

For Neelesh Jain & Associates

Proprietor

Bajrang Paras & Co.
Chartered Accountants

DATE: 12/04/2020

Whomever it may concern / Testimonial

"I have been using the Simplify Practice software since last 1 year, the software has helped me keep my staff in check and productive, the speed and performance of software is also very good. also I liked the training part offered by the company . Congratulations and keep up the good work."
I really want to thank to simplify practice team and ICAI for this simplify practice software arrangement.

FOR BAJRANG PARAS & CO
CHATERED ACCOUNTANTS

B.L Agarwal
PARTNER

Seal- BAJRANG PARAS & CO. FRN: 118663W CHARTERED ACCOUNTANTS

Way Forward

- Be the Number 1 choice for Practicing CA firms by 2022 in work Management softwares .
- We Plan to Reach out to as many Chapter offices as many across Asia-Pacific Region.

Thank You