



SIMPLIFY
PRACTICE
WE MAKE WORK EASY

SIMPLIFY PRACTICE

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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



- ▶ 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?

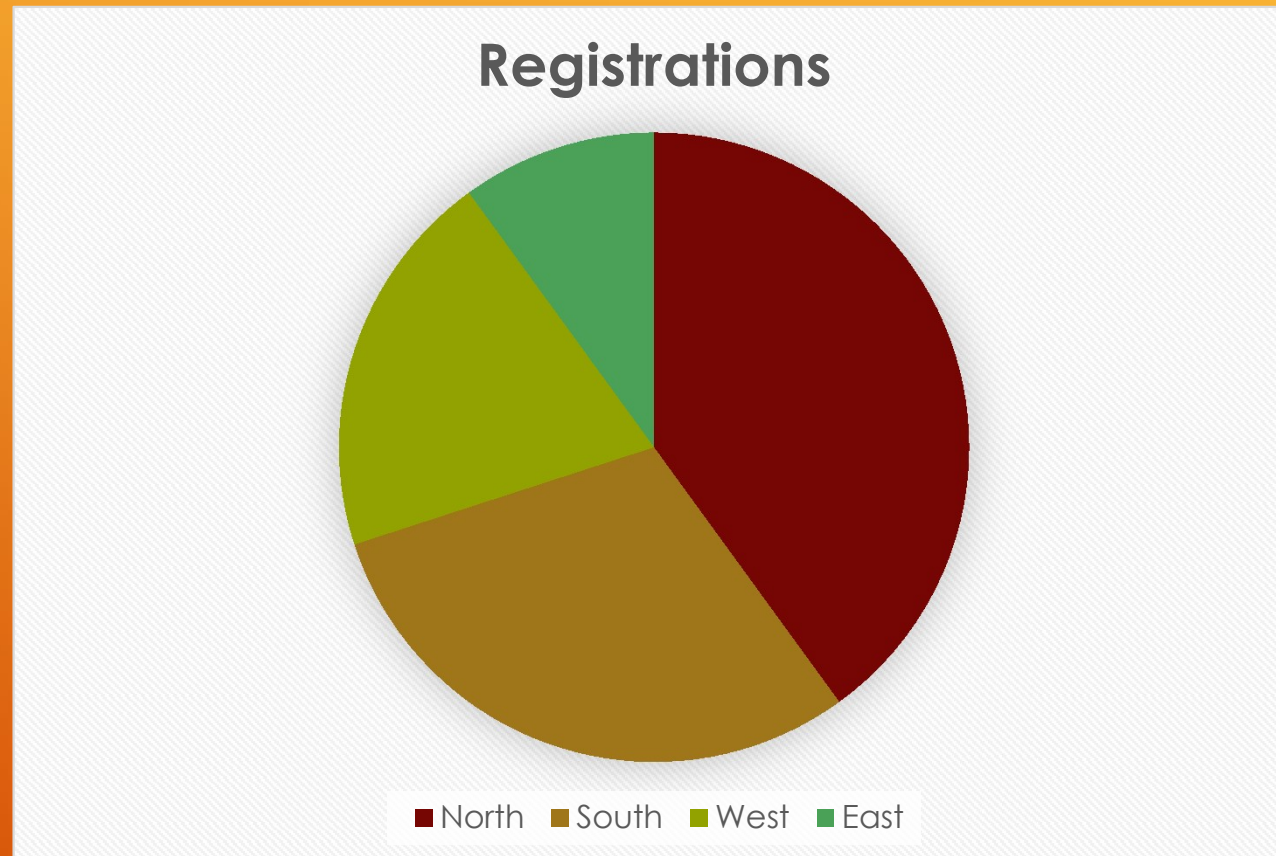


- ▶ It is a practice management tool.
- ▶ Android based Mobile Application Available.
- ▶ We track the location of an on field employee.
- ▶ We can get profitability report on a click.
- ▶ Practice Management provides an end-to-end solution and acts as an information hub related to work assignment for 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	5829 till 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



Home Function E-learning Terms & Conditions Login Sign Up

► SOFTWARE AS A SERVICE ◀


Simplify Practice is an innovative and robust software for practice management. It provides functionalities for synchronising and automating multiple processes.



Practice Management

Practice Management provides an end-to-end solution and acts as an information hub related to work assignment for Chartered Accountants and professional members in practice.


[View More](#)



CRM

CRM is a user friendly tool for professional practice organisation to connect your team with the client. The CRM helps to streamline business functions that include sales, engagement, and customer service.


[View More](#)



Employee

It is essential to gain insight about what's happening in your business over time. This module is one-stop solution to track the participation of each member towards the desired goal of the organisation.

[View More](#)



Chat

In professional practice maintaining the secrecy of client information is crucial. Also, sharing information via other social app may prove to be harmful. Therefore, our Chat solution facilitates exclusive...

[View More](#)

How Work is Managed In Software



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.



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► 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



Creation of a user



Creation of a Client



Creation of a assignment



Creation of a activity



Review of Work

Report Preparation in the software



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► 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



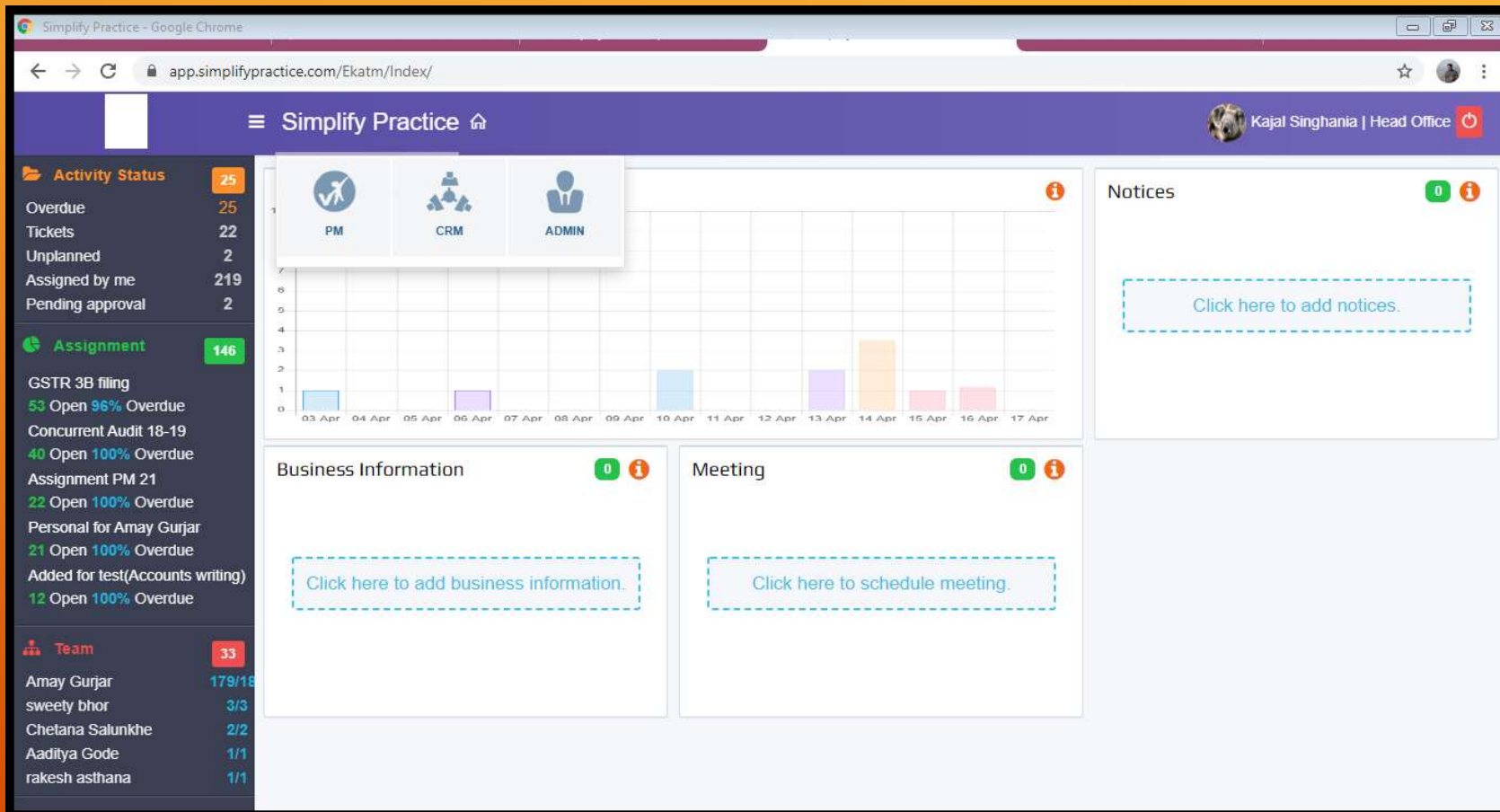
Training Program Of Simplify Practice

The 3 Stages of Programs Conducted

- Self Learning
- Instructor led Learning
- Customised Learning



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



The screenshot displays the Simplify Practice dashboard interface. The top navigation bar includes the company logo, the name 'Simplify Practice', and the user profile 'Kajal Singhania | Head Office'. The dashboard is divided into several sections:

- Activity Status:** A summary table showing 25 Overdue items, 22 Tickets, 2 Unplanned items, 219 Assigned by me, and 2 Pending approval items.
- Assignment:** A summary table showing 146 total assignments, including GSTR 3B filing (53 Open, 96% Overdue), Concurrent Audit 18-19 (40 Open, 100% Overdue), Assignment PM 21 (22 Open, 100% Overdue), Personal for Amay Gurjar (21 Open, 100% Overdue), and Added for test(Accounts writing) (12 Open, 100% Overdue).
- Team:** A list of team members with their respective counts: Amay Gurjar (179/18), sweety bhor (3/3), Chetana Salunkhe (2/2), Aaditya Gode (1/1), and rakesh asthana (1/1).
- PM, CRM, ADMIN:** Three main modules represented by icons and a dropdown menu.
- Bar Chart:** A chart showing data points for dates from 03 Apr to 17 Apr, with bars for 03 Apr, 06 Apr, 10 Apr, 13 Apr, 14 Apr, 15 Apr, and 16 Apr.
- Notices:** A section with a 'Click here to add notices.' button.
- Business Information:** A section with a 'Click here to add business information.' button.
- Meeting:** A section with a 'Click here to schedule meeting.' button.



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.

The screenshot displays the Simplify Practice Admin dashboard. The browser address bar shows the URL `app.simplifypractice.com/Ekatm/Index/#`. The user is logged in as Kajal Singhania | Head Office.

Admin

Opportunities (6)

New	0
Overdue/Yesterday	6/0
Today/Call Again	0/0
Tomorrow	0
This Week	1
Revived	0

Collection (0.00 T(0))

New	0.00 T(0)
Overdue	0.00 T(0)
Today	0.00 T(0)
Tomorrow	0.00 T(0)
This Week	0.00 T(0)

Appointments

Opportunity Rating

Hot	3	1.20 T
Warm	0	0.00 T

Team (6 + 0)

Aaditya Gode	1/0
Pratiksha Chatte12	0/0
rakesh asthana	0/0
Ravi B	1/1
Shreya N Uttarwar	0/0
Nirav Patel	1/1

User Management

- User Master
- Support Staff Master
- Group Master
- Branch Master
- Resource Hourly Rate
- User Category Master
- Department Master
- Designation Master
- Employee Information
- Assignment Actual Cost
- Financial Year Master

Securities

- Task Master
- Task Authority Management
- Replicate User Rights
- Left Employees

Leave Management

- Holiday List
- Calender Year Master
- Leave Type Master
- Leave Adjustment
- Leave Balance

Module Setup

- Practice Management (PM)
- CRM

Document Approval

- Document Approval Workflow
- Document Source Type

BI

- Report Design
- Scheduler Setting

Master

- Company Master
- Upload Off-Line Data



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Features of Practice management

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

This is the page of practice management in simplify practice

The screenshot displays the 'Practice Management' dashboard in a web browser. The browser address bar shows 'app.simplifypractice.com/Ekatm/Index/#'. The user is logged in as 'Kajal Singhania | Head Office'. The dashboard is divided into several sections:

- Activity Status:** A summary of activity counts: Overdue (25), Tickets (22), Unplanned (2), Assigned by me (219), and Pending approval (2).
- Assignment:** A list of assignments with their status and completion percentage. Examples include 'GSTR 3B filing' (53 Open, 96% Overdue) and 'Concurrent Audit 18-19' (40 Open, 100% Overdue).
- Team:** A list of team members and their assigned tasks: Amay Gurjar (179/18), sweetsy bhor (3/3), Chetana Salunkhe (2/2), Aadiya Gode (1/1), and rakesh asthana (1/1).
- Task List:** A detailed view of tasks. The current task is 'Time sheet filling activity' on 19 Feb, under 'abcdd(Agreement drafting)'. Below it are several 'Accounts writing' tasks, each assigned to 'Kajal Singhania' on 21 Feb, with various fiscal years and company names like 'NLP & CO' and 'S GS & Company'.
- Dropdown Menu:** A menu is open over the task list, listing actions: Create Assignment, Mandate, Billing, Leave, Claim, Meeting, Resource Allocation Report, Checklist, Setting, Report, and Help.
- Calendar/Task View:** On the right, there's a view showing dates (16 Apr, 17 Apr) and task cards. Each card indicates '1 of 4 hrs' and 'Delayed' status.

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

CRM

Kajal Singhania | Head Office

Opportunities 6

New	0
Overdue/Yesterday	6/0
Today/Call Again	0/0
Tomorrow	0
This Week	1
Revived	0

Collection 0.00 T(0)

New	0.00 T(0)
Overdue	0.00 T(0)
Today	0.00 T(0)
Tomorrow	0.00 T(0)
This Week	0.00 T(0)

Appointments

Opportunity Rating

Hot	3	1.20 T
Warm	0	0.00 T

Team 6 + 0

Aaditya Gode	1/0
Pratiksha Chatte12	0/0
rakesh asthana	0/0
Ravi B	1/1
Shreya N Uttarwar	0/0
Nirav Patel	1/1

Masters

- Prospective Client
- Client Master
- Service Master
- Country Master
- State Master
- Territory Master
- City Master
- Business Segment Master
- Sales Family

Application Setup

- Suspect Source
- Prospect Setting
- Entity Type Master
- Outcome Settings
- Reason Category Master
- User Settings
- Item Classification
- Common Word Master

Mandate

- Mandate Entry

BI Reports

13 Nov 2019 09:00 AM

18 Nov 2019 09:00 AM

03 Feb 2020 09:00 AM

10 Feb 2020 09:00 AM

12 Feb 2020 09:00 AM

13 Apr 2020 09:00 AM

Mukesh--Chabaria EV.₹ 1200 by 28-Mar
Pune City -Direct Taxation -General-(Income Tax return filing)(Mukesh--Chabaria-9898989898)-mukesh@gmail.com
for Client has been closed. Asked to visit his factory.
From general

Avinash k--Behra
Pune City -iunh -General-(Income Tax return filing)(Avinash k--Behra-1112223334)-avinashbehra@gmail.com
for complete

Load future opportunities...

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)

The screenshot displays the 'User Master' form in a web browser. The browser's address bar shows 'app.simplifypractice.com/Ekatm/Index/#'. The user is logged in as 'Kajal Singhania | Head Office'. The form is titled 'User Master' and is divided into several sections:

- Basic Information:** Includes fields for Name (Mr., First Name, Middle Name, Last Name), Date of Joining (17/04/2020), Date of Birth (17/04/2000), Email, Mobile, Alternate Mobile, Ext No, Branch, Department, Designation, Reports to, and Category.
- User Settings:** Includes Shift Code (G), Allow timesheet entry for (1 day(s) in past), Separation Date (17/04/2020), and checkboxes for 'Is CRM user', 'Is delivery Agent', 'Allow user to enter timesheet without timeslot', and 'Allow to complete activity without timesheet reporting'.
- Personal Details:** Includes fields for Aadhaar No., PAN, PF No., and Membership No.
- Present Address:** Includes a large text area for Address, and fields for Country, State, City, and ZIP/Postal. A checkbox below reads 'Click here if permanent address different as present address'.

At the bottom right of the form, there are 'Save' and 'Cancel' buttons.



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.



This is the page for adding new client basic data

Simplify Practice - Google Chrome
app.simplifypractice.com/Ekatm/Index/#

CRM

Kajal Singhania | Head Office

Client

Basic | Locations

Company Name : Short Name : Importance : ★ ★ ★ ★

Entity Type : Code : C95344 CIN : Select Service Offered

Address :

Country : State : District : Taluka :

City : Pin Code : Landline No :

Website : Active : ON

Contact Details

Contact Name : Designation : Email ID :

Influential Level : Mobile No : Is Default : DIN :

Save Contact

Save Cancel

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

Header

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.



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From here we can create an assignment

The screenshot shows a web browser window with the URL `app.simplifypractice.com/Ekatm/Index/#`. The page title is "Practice Management". The user is logged in as "Kajal Singhania | Head Office".

The main content area is titled "Add Assignment" and contains a form with the following fields:

- Code :
- Name :
- Type :
- Location :
- Department :
- Start Date : End date :
- Status :
- Activity period in :

At the bottom right of the form, there are "Cancel" and "Save" buttons.

The left sidebar contains a navigation menu with the following items:

- Activity Status (23)
 - Overdue 25
 - Tickets 22
 - Unplanned 2
 - Assigned by me 219
 - Pending approval 2
- Assignment (146)
 - GSTR 3B filing
 - 53 Open 96% Overdue
 - Concurrent Audit 18-19
 - 40 Open 100% Overdue
 - Assignment PM 21
 - 22 Open 100% Overdue
 - Personal for Amay Gurjar
 - 21 Open 100% Overdue
 - Added for least(Accounts writing)
 - 12 Open 100% Overdue
- Team (33)
 - Amay Gurjar 179/18
 - sweety bhor 3/3
 - Chetana Sakunkhe 2/2
 - Aaditya Gode 1/1
 - rakesh asthana 1/1

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.

The screenshot shows the 'Create Activity' page in the Simplify Practice application. The page is titled 'Practice Management' and is accessed via the URL 'app.simplifypractice.com/Ekatm/Index/#'. The user is logged in as 'Kajal Singhania | Head Office'.

Activity Status:

- Overdue: 25
- Tickets: 22
- Unplanned: 2
- Assigned by me: 219
- Pending approval: 2

Assignment: 146

- GSTR 3B filing: 53 Open 96% Overdue
- Concurrent Audit 18-19: 40 Open 100% Overdue
- Assignment PM 21: 22 Open 100% Overdue
- Personal for Amay Gurjar: 21 Open 100% Overdue
- Added for test(Accounts writing): 12 Open 100% Overdue

Team: 33

- Amay Gurjar: 179/18
- sweety bhor: 3/3
- Chetana Salunkhe: 2/2
- Aaditya Gode: 1/1
- rakesh asthana: 1/1

Create Activity Form:

- Activity Description: [Text Area]
- Financial Year: --Select--
- Priority: Normal
- Assign from: Assignment Participants
- Starts on: 17/04/2020
- Ends on: 17/04/2020
- Efforts: 4 Hrs
- Recurrence: [Button]
- Task will be created in:
 - Assignment: Personal for Amay Gurjar
 - Activity Type: book keeping
 - Client Name: [Search Field]
 - Contact Person: [Add Button]
 - Charge Amount: [Text Field]
 - Intimate by Email: [Checked]
 - Notify Completion: [Unchecked]
 - Approval Required: [Unchecked]

Buttons: Cancel, Save

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

The screenshot displays a web application interface for 'Practice Management'. The main content area is titled 'Assignment Review' and lists several tasks with their respective status counts. Each task row includes buttons for 'Assigned', 'Overdue', 'Critical', 'Complete', 'Unapproved', 'Total', and 'Unplanned'. The tasks listed are:

- abcdd(Agreement drafting) - End Date: 20-Jun-2019
- Accounts writing - End Date: 11-Jan-2019
- Added for test(Accounts writing) - End Date: 04-Jan-2019
- Added for test(Accounts writing) - End Date: 09-Jan-2019
- Added for test(Agreement drafting) - End Date: 10-Jan-2019
- Added for test(Agreement drafting) - End Date: 10-Jan-2019
- Added for test(Agreement drafting) - End Date: 10-Jan-2019
- Added for test(Allotment of shares) - End Date: 09-Jan-2019
- Added for test(Allotment of shares) - End Date: 09-Jan-2019

On the left side, there is a sidebar with three sections:

- Activity Status** (26): Overdue (25), Tickets (22), Unplanned (2), Assigned by me (219), Pending approval (2).
- Assignment** (146): GSTR 3B filing (53 Open 96% Overdue), Concurrent Audit 18-19 (40 Open 100% Overdue), Assignment PM 21 (22 Open 100% Overdue), Personal for Amay Gurjar (21 Open 100% Overdue), Added for test(Accounts writing) (12 Open 100% Overdue).
- Team** (33): Amay Gurjar (179/18), sweety bhor (3/3), Chetana Salunkhe (2/2), Aaditya Gode (1/1), rakesh asthana (1/1).

On the left side we can find the status bar which includes Activity Status, 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 follow

Fill the Profile and enter the sales family interest.

Assigning opportunity Opportunity.

The screenshot displays a web browser window with the URL `app.simplifypractice.com/Ekatm/Index/#`. The page title is "Simplify Practice - Google Chrome". The user is logged in as "Kajal Singhania | Head Office". The main content area is titled "Prospect Information" and features a "Select All" checkbox, an "Add" button, and "Archive" and "Select New User" buttons. A table lists various prospects, each with a checkbox, name, address, segment, and call status. A context menu is open over the "Avinash k--Behra" prospect, showing options: "Edit", "Opportunity Fee", "Assign Opportunity", and "Move To Archive".

Prospect Name	Address	Segment	Call Status	Action
<input type="checkbox"/> Apollo Hospital At Pune City for ACCOUNTING	Kharadi, Pune-411038	pharma	3 Open Calls	Action
<input type="checkbox"/> Avinash k--Behra At Pune City for iunh referred by hfz (Customer)	d 917 shanoni		4 Open Calls	Edit, Opportunity Fee, Assign Opportunity, Move To Archive
<input type="checkbox"/> Ekant--Singh At Pune City for AUDIT referred by Vrithi Solutions Ltd (Customer)	Kothrud Road		1 Open Calls	
<input type="checkbox"/> Enterprise21 At Pune City for	kothrud	Media		Action
<input type="checkbox"/> M Business At Pune City for	Pune	Agriculture	1 Open Calls	
<input type="checkbox"/> M Enterprise 23rd jan At Pune City for	kothrud	Agriculture		Action
<input type="checkbox"/> M Enterprise2 23rd jan At Pune City for	kothrud	Agriculture	1 Closed Calls	Action
<input type="checkbox"/> Monica Howale21 At Pune City for referred by kirtoskar (Customer)	kothrud	Media	1 Open Calls	Action
<input type="checkbox"/> Monica--Lisa At Pune City for AUDIT referred by Vrithi Solutions Ltd (Customer)	kothrud road		1 Closed Calls	Action
<input type="checkbox"/> Mukesh--Chabaria At Pune City for Direct Taxation	kothrud road		1 Open Calls	Action
<input type="checkbox"/> New for PM At Pune City for	Pune	Agriculture	1 Open Calls	Action
<input type="checkbox"/> raju--chacha At Pune City for referred by Vrithi Solutions Ltd (Customer)	kothrud			Action
<input type="checkbox"/> Ramesh-- At Pune City for Direct Taxation	Kothrud road		1 Open Calls	Action
<input type="checkbox"/> ritghj At Abdasa for AUDIT referred by A K PAREEK AND ASSOCIATES (Customer)	dfghj	pharma		Action

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

The screenshot displays the Simplify Practice CRM interface. The browser address bar shows 'app.simplifypractice.com/Ekatm/Index/#'. The user is logged in as 'Kajal Singhania | Head Office'. The main content area is titled 'Opportunities' and features a search bar and a list of six opportunity entries. Each entry includes a date, time, sender name, subject, and an 'Action' button. The left sidebar contains navigation menus for 'Opportunities', 'Collection', 'Appointments', 'Opportunity Rating', and 'Team'.

Opportunities	New	Overdue/Yesterday	Today/Call Again	Tomorrow	This Week	Revived
0	6/0	0/0	0	1	0	

Collection	New	Overdue	Today	Tomorrow	This Week
0.00 T(0)	0.00 T(0)	0.00 T(0)	0.00 T(0)	0.00 T(0)	0.00 T(0)

Opportunity Rating	Hot	Warm	
3	1.20 T	0	0.00 T

Team	New	Overdue	Today	Tomorrow	This Week
Aaditya Gode	1/0	0/0	0/0	1/1	0/0
Pratiksha Challe	12	0/0	0/0	1/1	0/0
rakesh aslhana	1/1	0/0	0/0	1/1	0/0
Ravi B	1/1	0/0	0/0	1/1	0/0
Shreya N Uttarwar	1/1	0/0	0/0	1/1	0/0
Nirav Patel	1/1	0/0	0/0	1/1	0/0

Opportunities	Date	Time	Sender	Subject	Action
Monica Howale21	13 Nov 2019	00:00 AM	Pune City --General--	(Income Tax: return filing)(mhtest-900001000)-mhtest@gmail.com	Action
M Business	18 Nov 2019	00:00 AM	Pune City --General--	(fg)(Monica)	Action
Apollo Hospital	03 Feb 2020	00:00 AM	Pune City --ACCOUNTING--	(Income Tax: return filing)(Kamal Singh-987698785)-kamal.singh@gmail.com	Action
Ekant--Singh	10 Feb 2020	00:00 AM	Pune City --AUDIT--	(Income Tax: return filing)(Ekant--Singh-9898989898)-e@gmail.com	Action
Mukesh--Chabaria	12 Feb 2020	00:00 AM	Pune City --Direct Taxation--	(Income Tax: return filing)(Mukesh--Chabaria-9898989898)-mukesh@gmail.com	Action
Avinash k--Behra	13 Apr 2020	00:00 AM	Pune City --lunh--	(Income Tax: return filing)(Avinash k--Behra-1112223334)-avinashbehra@gmail.com	Action

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.

The screenshot displays a CRM application interface with a calendar view for April 2020. The browser address bar shows the URL `app.simplifypractice.com/Ekatm/Index/#`. The user is identified as Kajal Singhania | Head Office.

Sidebar Metrics:


- Opportunities:** 6 total. Sub-categories: New (0), Overdue/Yesterday (6/0), Today/Call Again (0/0), Tomorrow (0), This Week (1), Revived (0).
- Collection:** 0.00 T(0). Sub-categories: New (0.00 T(0)), Overdue (0.00 T(0)), Today (0.00 T(0)), Tomorrow (0.00 T(0)), This Week (0.00 T(0)).
- Appointments:** 0.
- Opportunity Rating:** Hot (3, 1.20 T), Warm (0, 0.00 T).
- Team:** 6 members. Performance: Aaditya Gode (1/0), Pratishtha Chatterjee (0/0), Rakesh Asthana (0/0), Ravi B (1/1), Shreya N Uttarwar (0/0), Nirav Patel (1/1).

Calendar View:

The calendar shows a grid for April 2020. A specific activity, "Sa Sales(1)", is scheduled for Monday, April 13th. The calendar also shows dates for the rest of the month, with some dates highlighted in red (Sundays and Saturdays) and others in yellow (Fridays).

Sun	Mon	Tue	Wed	Thu	Fri	Sat
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13 Sa Sales(1)	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	1	2
3	4	5	6	7	8	9

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.
neesh.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 Neesh 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
CHARTERED ACCOUNTANTS

B.L. Agarwal
PARTNER

Seal: 

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.
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Thank You

