

Client Management System For CA's CMCA

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Abstract- *The project title itself defines the nature of purpose behind developing the stated project..Currently CA's have been facing problems managing their clients.*

They are having issues managing their clients by updating them with each and every informations and updates they get from goverment and some other platforms.Other than that CA's also find difficulties keeping their client's data and documents well managed.Also clients have same problems updating their CA's with their files and documents on time in order to files income tax returns and other due taxes.

Keywords- CA's system, Client's document, Online upload.

I. INTRODUCTION

The Client Management System for CA's is an application that will be helpful to CA who handle multiple client. It will be easy to handle multiple clients through this application easily and efficiently.They can upload the data,information,files or any ta related documents.this will make communication easy between clients And their CA's.

There are many problems regarding the present at CA's system like in delay in uploading files or regarding tax or any other kind of delay.

This will make the work easy for CA's to upload client files,informations,documents etc.

II.CURRENT SYSTEM

Study of current system

According to the current situation, we can see a little bit of disappointment on CA's faces as they have to manage almost more than 100 client during the their period. Also by keeping them managed, it results a difficulty for CA's to manage other regular clients. By managing both part, CA's feel drained out of energy and working stamina. But anyhow, they have to do all these as a part of their responsibilities.

Problems & weakness of current system

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There are many companies in the market which have been blacklisted by promoting students in a wrong way. Many companies doing unofficial activities have been captured by universities. Basically, such companies are caught on the basis of providing students training certificates without providing them proper training. Also on the other part, by mutual understanding of IT companies and Students, IT companies charge a huge amount just to issue a certificate without training. Also, some students have been captured presenting fake training certificates by representing a fake company. Also there is no system to keep a close watch on student's reports and attendance in the IT Company where they are pursuing their training. So, by looking over such issues and loopholes, we currently don't have any system to keep everyone under a single radar watch.

III. LITERATURE REVIEW

Client Management System for CA's is an System based application by which CA's can fill or upload their client document or files easily. We made this application because there are many documents delay or regarding illegal files Upload.

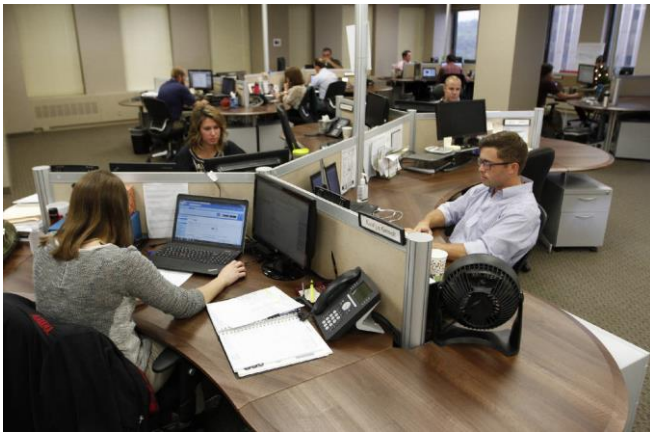
In brief, our project is meant to solve the CA's problem for clients. It is a time saving application by which there wills no wastage of time in between the uploading documents.

Clients don't want to stand in line for filling their documents in CA's office. So there in no risk of uploading illegal files.

Our main aim is to uploading clients documents online.

Problems with the present CA's for clients system are as follows.

- Large no of client's to handle at one time.
- Large no file's or document's of client's.
- Delay of uploading document's or due date's.
- Uploading half file's legal and another half illegal to cheat tax with government.



IV. METHODOLOGY

CMCA is an java/ android application work on all android devices. The main work of this application is to make work ease for the client & CA’s both. During our research we have found no application in which client or CA’s upload their document online in prsence of government as third party.Thus we are intersted in developing an application which would surely make difference to the digital world

The application will work in following way:

Module 1(for CA)

1. CA assistent will be able to generate ID & Password for associated clients in order to let the client communicate directly with CA.
2. CA will be able to fetch all the information/Bills/documents/statements clients share.
3. After fetching such files, it will be easier for CA to review that file and fill the tax returns easily.
4. Also, CA will be able to send notifications/Updates to his clients in case if CA finds any problem in bills/statements/documents.
5. System will notify the CA to remind his clients that their due dates are nearby.
6. Also, CA will be able to set due date reminder and upcoming tax filing date reminder which will notify the client automatically prior to their upcoming or due dates.
7. According to GST terms, all business firms will have to file and pay their GST dues every month. So, in this situation, CA will be able to notify clients about their due date and upcoming filing date via this portal or via SMS/Emails and other communication mediums.
8. After filing the income tax returns and GST dues, CA can send the acknowledgement receipt/letter to the client.

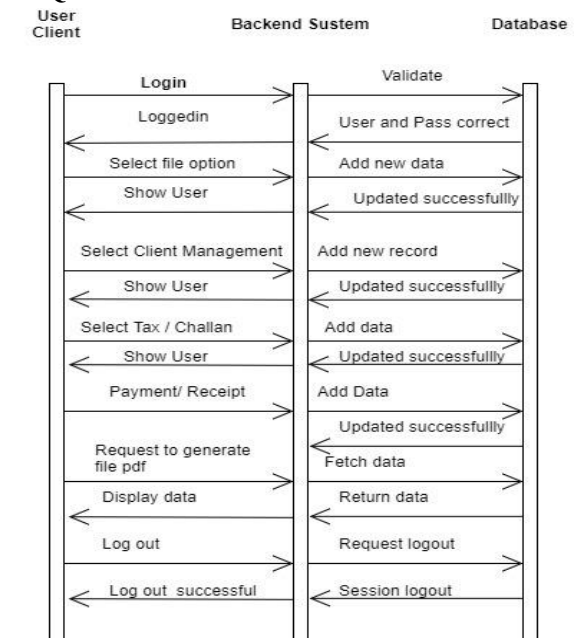
9. CA will have privileges to grant or limit the access he provides to his clients.
10. Also, CA will have edit/update/delete access in order to manage his clients.
11. Login and activity history of all the client will be monitored and stored in order to give the portal privacy and to keep the portal well managed.
12. Shared files’ history and notification history will also be stored.
13. CA will also have the feature of managing his Assistant CA’s profile and activity.
14. No one will have to edit/update/delete access to the history as history will act as mirror of all the activites.

Module 2(For Clients)

1. Clients will be able to login to their portal by inserting the credentials provided by their CAs.
2. To make the tax management easier, client will be able to attach/upload/send his all billing and account statements on the portal.
3. Also, client will get notifications/updates from CA as stated above in module 1.
4. Client will be able to manage his all documents digitally and also, he will have access to his old submitted documents by browsing the history.
5. Client will also have the access to files and documents shared by his CA.
6. Also, client will have access to send notifications/updates if he gets the access granted by his CA.

DIAGRAM:

SEQUENCE DIAGRAM



V. SPECIAL FEATURES

The idea to this application was inspired by Income tax department which allow to handle multiple client's through offline mode .In this application we make online mode to handle multiple client's through CA's.In this appliccation CA's upload files online according to pay taxation by income tax. This allow process in under control by government officer's or CA's appointed by govt.

UNIQUE FEATURES:

Legal/Illegal:This is one of the main feature of the application as document of client upload by CA's is leagl or illegal. If legal than apporved but if illegal than document doesn't upload.

Not A Waste of Time: As the documen is uploading online thier is no waste of time because in offline mode client have to goto CA's office to submit document but in online mode their is no wastage of time.

Multiple User's: Through this application the CA's can handle multiple Client's because of online mode.CA's can handle client's file easily to upload.

Notification Bar:In this section the notifiacion are come to CA's &Client's through mail/text msg that their due date's is come to pay tax,upload document's,verify document's,or any other activity related to pay tax.

Record's:All CA's mantain their Client's record for any issue related to pay tax or any action taken by government in future.

VI. CONCLUSION

Through this application genuine work has been carried out to give CA's and Clients better services implemented throughout the various stages of project.The app has been made in such a way that Clients can upload their document easily and properly so that no one can miss their uploading documents.With the help of this application Clients doesn't want to stand in line for giving their documents.No wastage of time in betwween uploading documents.

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