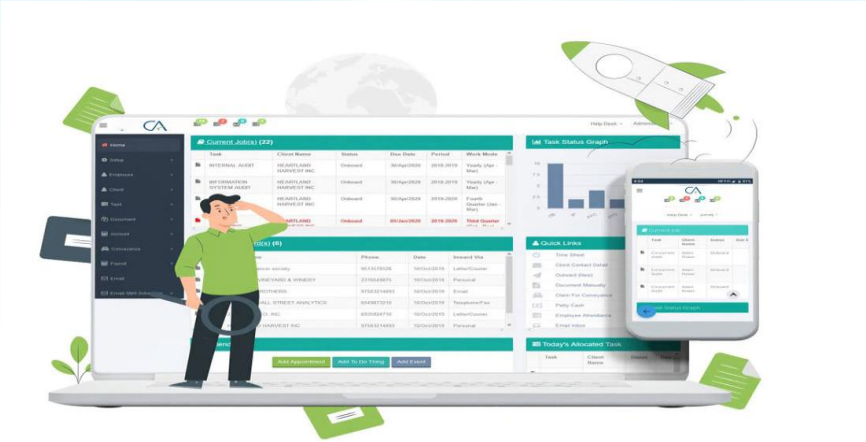
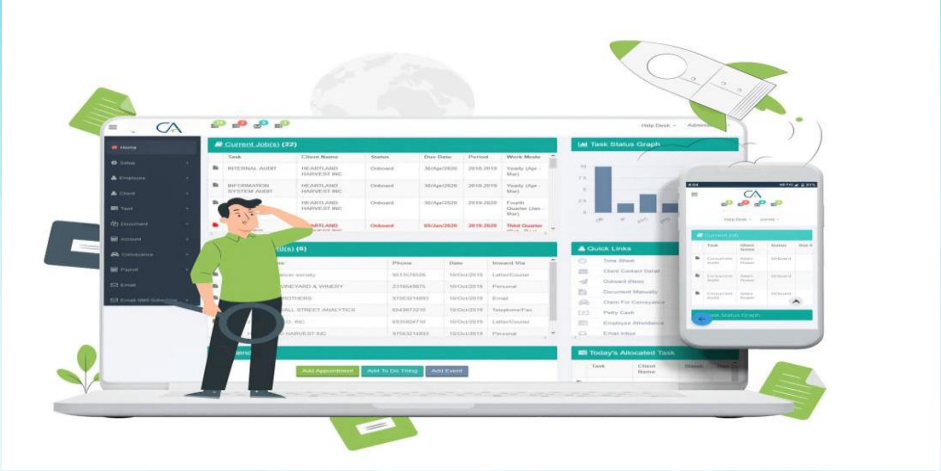
Practice Management Software for CA Practitioners & CA Firms



PARVEJ SURANI



As you all are aware,

The ICAI has launched **Practice Management Software** for CA Practitioners & CA Firms **free of cost** to Enhance Operational Efficiency for Practicing CAs.

It is fully designed to cater to the unique needs of CA professionals. ICAI PMS is an advance cloud platform to standardize all office operations and making professionals future ready with global standards.

It is an excellent initiative by the ICAI for its members.

How To Register For the Practice Management Software

Members may Register for the Practice Management Software at the link :

http://cacloud.ca.in/Registration.aspx

Click on -> Register Here Button

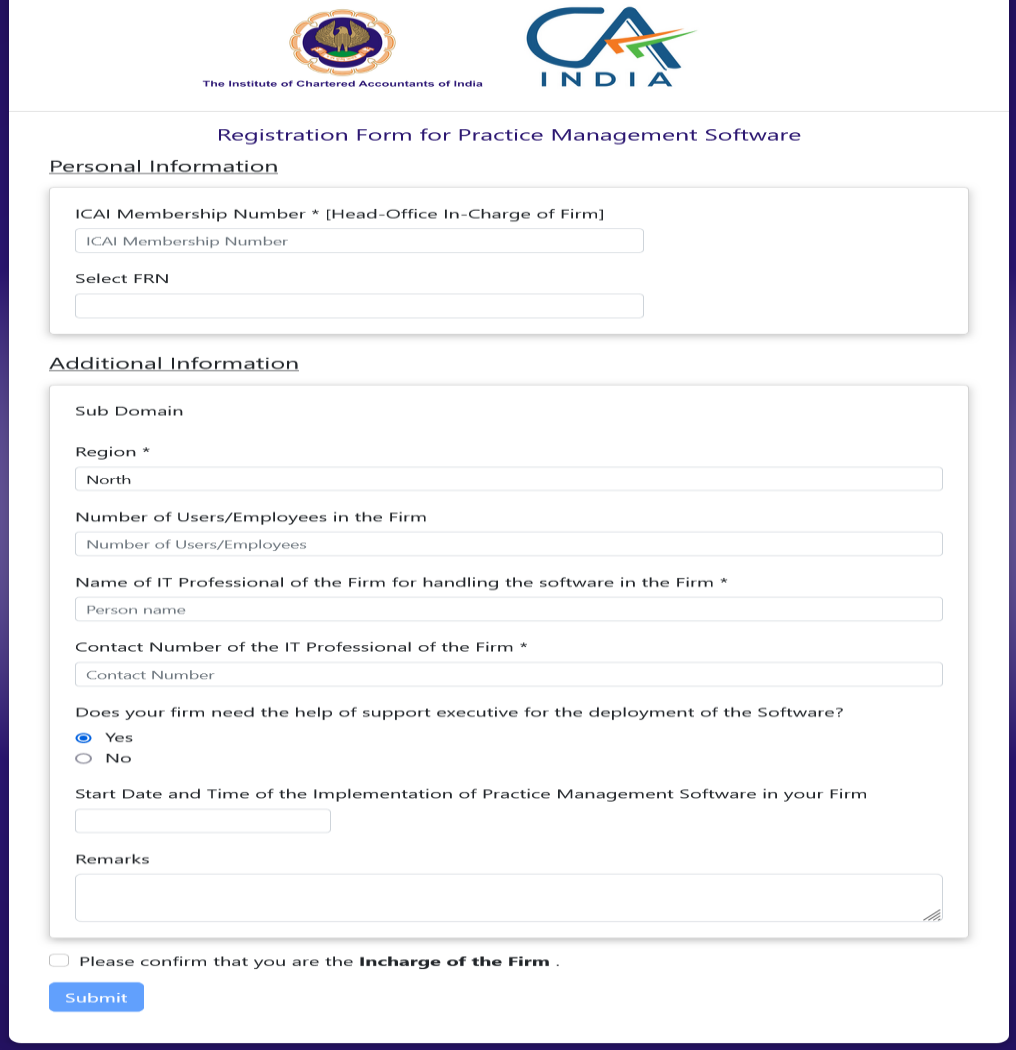
Add Membership Number **[Head-Office In-Charge of Firm]**

Select FRN

Click on Submit Button

Within Six Hours You Will Get Your PMS ID and Credentials On Your Registered Email Address.

How To Register For the Practice Management Software



The Institute of Chartered Accountants of India

Registration Form for Practice Management Software

Personal Information

ICAI Membership Number * [Head-Office In-Charge of Firm]

ICAI Membership Number

Select FRN

Additional Information

Sub Domain

Region *

North

Number of Users/Employees in the Firm

Number of Users/Employees

Name of IT Professional of the Firm for handling the software in the Firm *

Person name

Contact Number of the IT Professional of the Firm *

Contact Number

Does your firm need the help of support executive for the deployment of the Software?

- (•) Yes
- ( ) No

Start Date and Time of the Implementation of Practice Management Software in your Firm

Remarks

[ ] Please confirm that you are the **Incharge of the Firm** .

Submit

It’s Time to Streamline Your Firm.

PRACTICE MANAGEMENT SOFTWARE FOR CA FIRMS

Managing an CA firm requires keeping everyone on the same page. You need one-stop practice management software that will empower your firm, your team, and your clients. It allows you to streamline the processes and work together easily and efficiently at every step of your accounting process. Practice management software offers some specific tools that let you communicate effectively, track how your time is being spent, and provide an ideal client experience, so you can retain clients and scale your business.

Hands on Training on Practice Management Software

To Check The Feature Of The Software. These Are The Demo Credentials.

https://icaipmsdemo.cacloud.ca.in

Admin Credentials

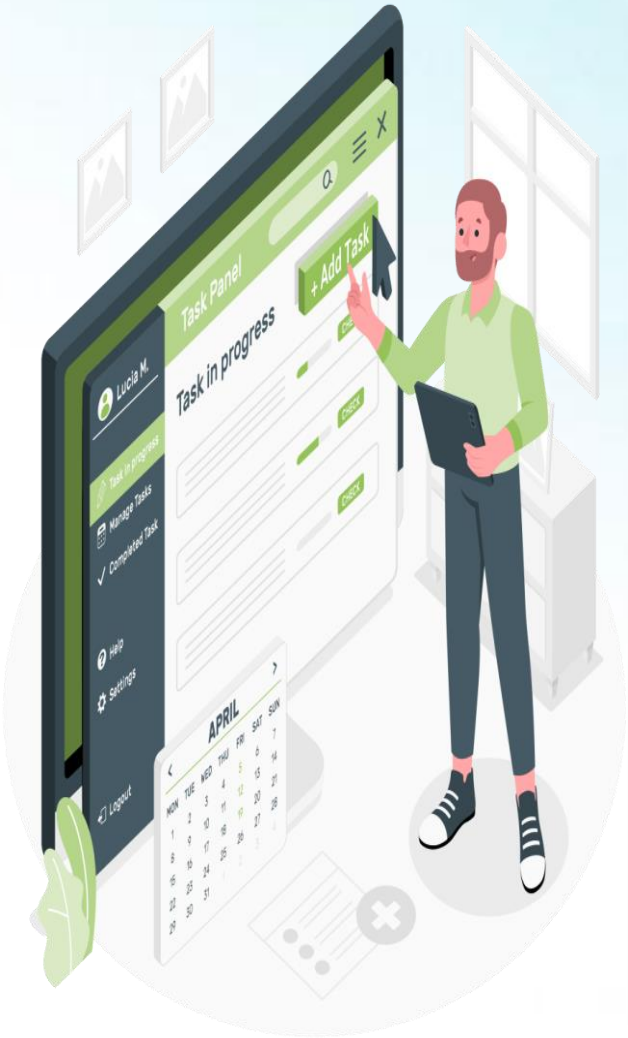
Username - Administrator

Password – admin1@icaicmp

Advanced Practice Management Software Modules

- Task Management Module
- Document Management Module
- Account Management Module
- Client Management Module
- Communication Management Module
- Employee Management Module
- Email Scheduler
- Calendar Control Module

Practice Management Modules



Task Management Module

A Better Way To Take Control On Your Tasks & Streamline Your Processes.

Managing tasks, subtasks & deadlines is surely a tedious job, but with PMS you can organize your team's workflow, make better decisions, and achieve more of your goals with satisfied clients.

Practice Management Modules

Document Management Module

Manage Paperless Documentation with Latest Security & Encryption Protocols

Track every inward/outward documents and make it available to clients in just a few clicks. Allow your team to have easy & flexible document transfer & central client document repository on a secure server.

Practice Management Modules

Account Management Module

Manage Your Firm Smartly With Amazingly Simple & Fast Solutions.

Manage & track every financial activity for multiple clients. Generate automated financial reports and collect online payment against invoices in multiple currencies through an integrated payment gateway.

Practice Management Modules

Client Management Module

Manage Real-Time Client Activities On Your Fingertip

Manage all client activities from your mobile. Create client groups & client wise login credentials to add or remove client's information. Search clients using variety of filters & generate group-wise reports, invoices, and receipts.

Practice Management Modules

Communication Management

Plan Your Communication Process with Accurate Solutions

Manage, schedule, control & automate your team's tasks using different communication channels of PMS Software.

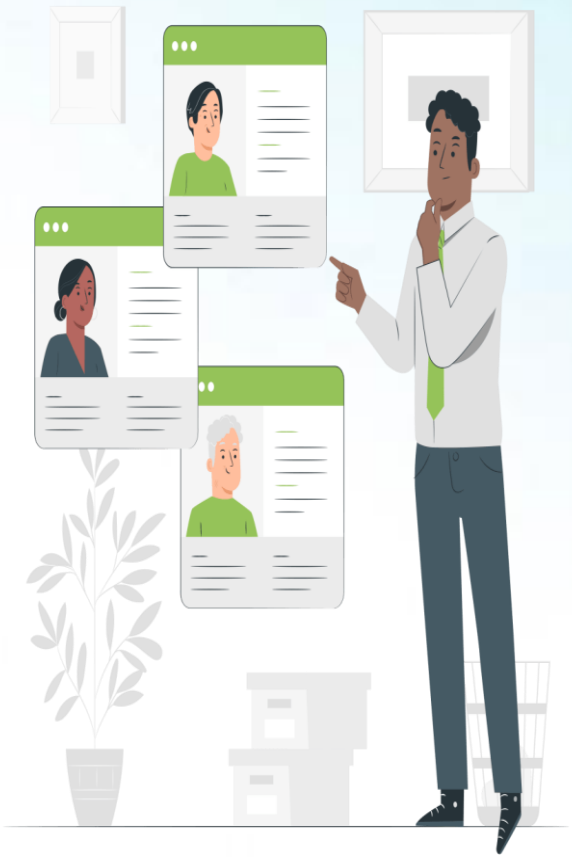
Practice Management Modules

Employee Management Module

Stay Connected with Your Employees From Anywhere, Anytime.

Maintain your staff by managing their database, documents, role and hierarchy, attendance, time sheet, work report, and communications in one place. Create transparent and professional work culture.

Practice Management Modules



Email Scheduler

This feature allows admin to manage all important checkpoints efficiently. Receive timely notifications and keep your staff and clients informed. Set auto notifications based on various criteria such as activity, action, time, client type, and different tagging to never miss anything.

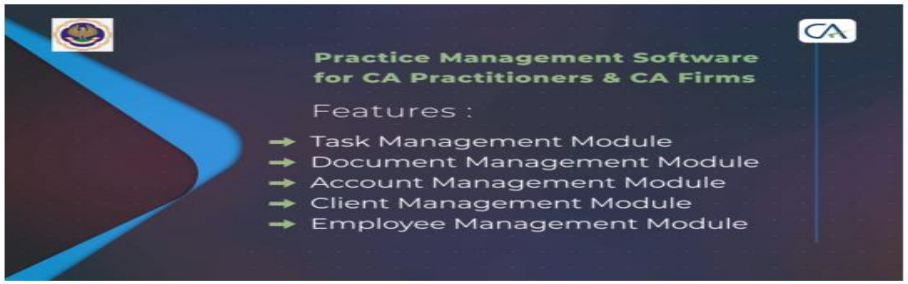
PMS Support System

ICAI understood the importance of support in the PMS segment, role of user acceptance & awareness. And to cater to a large scale, we started many channels and conducted different exercises to cater to and satisfy a large scale. We started an effective support system with different support channels like:

- Online Video Tutorials
- Online Help Library
- Regular Seminars
- Hand Holding & deployment with one-to-one training
- On-call support system
- E-sahaayataa ticket system
- Module wise seminars
- User suggestion and PMS updation system

Support Details:

User can access all support channels from PMS website @ www.cacloud.ca.in



Thank You all & ICAI for giving us this opportunity.

PARVEJ SURANI