

Welcome to **Ted Talk** style Seminar



Please raise your hand and ask question
All ~~stupid~~ questions are welcomed

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Recommendations about any software is a personal opinion. Consider them as “Editor’s Choice”
Use your professional scepticism while choosing any software for your use
The audience is expected to perform their own due diligence before taking any action based on the discussion during the sessions.

Icons are courtesy of iconarchive.com and flaticon.com



Email Management

CA Maitri Chheda



www.jesperdeleuran.dk

Does your Inbox look like this?

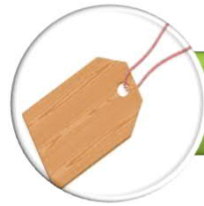




Crash course on Organizing, Searching, and Automating Gmail



Optimize your Inbox



Make use of Labels



Master Advance Search and Filters

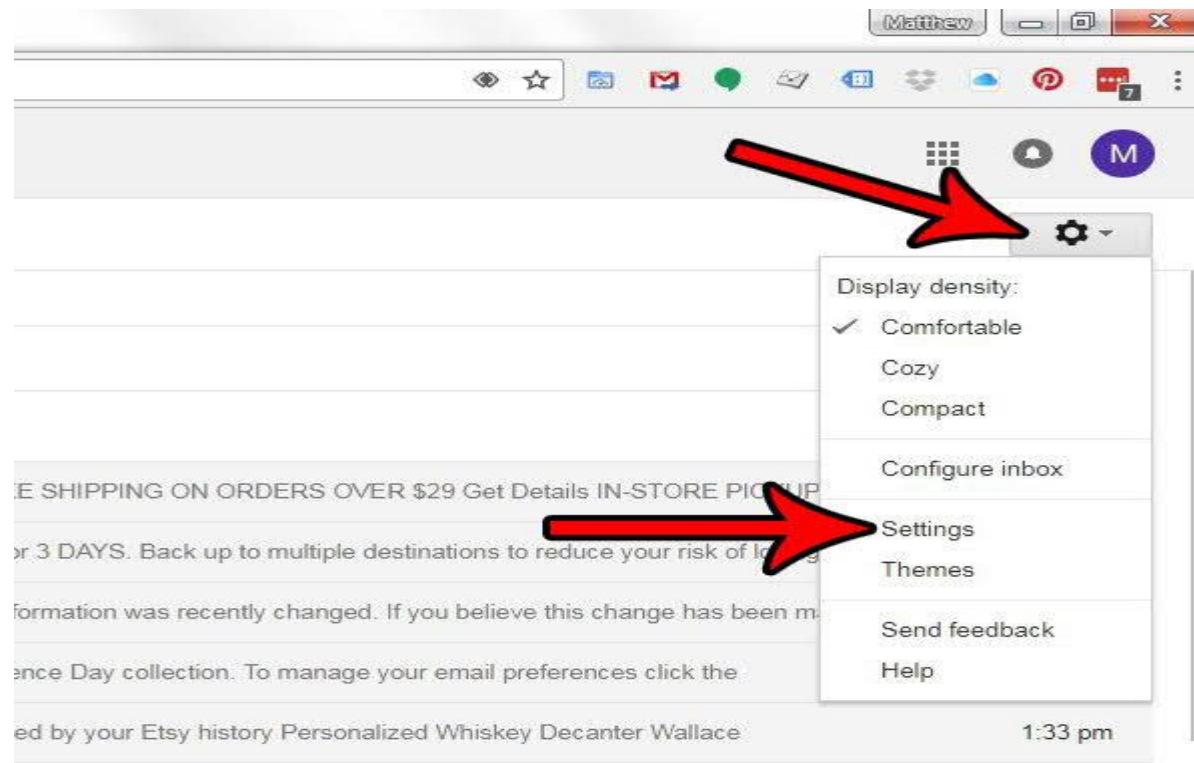


Valuable Add ons and More



Optimize your Inbox

- Enable Keyboard Shortcuts





Optimize your Inbox

- Enable Keyboard Shortcuts

The screenshot shows the Gmail Settings page. The 'Keyboard shortcuts' section is highlighted with a red arrow pointing to the 'Keyboard shortcuts on' radio button. The settings are as follows:

Section	Options
Desktop notifications:	<input type="radio"/> New mail notifications on - Notify me <input type="radio"/> Important mail notifications on - Notify me <input checked="" type="radio"/> Mail notifications off
Keyboard shortcuts:	<input type="radio"/> Keyboard shortcuts off <input checked="" type="radio"/> Keyboard shortcuts on
Button labels:	<input checked="" type="radio"/> Icons <input type="radio"/> Text
My picture:	Select a picture that everyone will see
People Widget:	<input checked="" type="radio"/> Show the people widget - Display in my inbox <input type="radio"/> Hide the people widget
Create contacts for auto-complete:	<input checked="" type="radio"/> When I send a message to a new person <input type="radio"/> I'll add contacts myself



Optimize your Inbox

- Keyboard Shortcuts (Cheat Sheet)

Keyboard shortcuts

Keyboard shortcuts are enabled. [Disable](#)

Jumping

- `g` then `i` : Go to Inbox
- `g` then `s` : Go to Starred conversations
- `g` then `t` : Go to Sent messages
- `g` then `d` : Go to Drafts
- `g` then `a` : Go to All mail
- `g` then `c` : Go to Contacts
- `g` then `k` : Go to Tasks
- `g` then `l` : Go to Label

Threadlist selection

- `* then a` : Select all conversations
- `* then n` : Deselect all conversations
- `* then r` : Select read conversations
- `* then u` : Select unread conversations
- `* then s` : Select starred conversations
- `* then t` : Select unstarred conversations

Navigation

- `u` : Back to threadlist
- `k / j` : Newer/older conversation
- `o` or `<Enter>` : Open conversation; collapse/expand conversation
- `p / n` : Read previous/next message
- `>` : Go to next inbox section
- `~` : Go to previous inbox section

Application

- `c` : Compose
- `/` : Search
- `q` : Focus chat contact search
- `?` : Open shortcut help

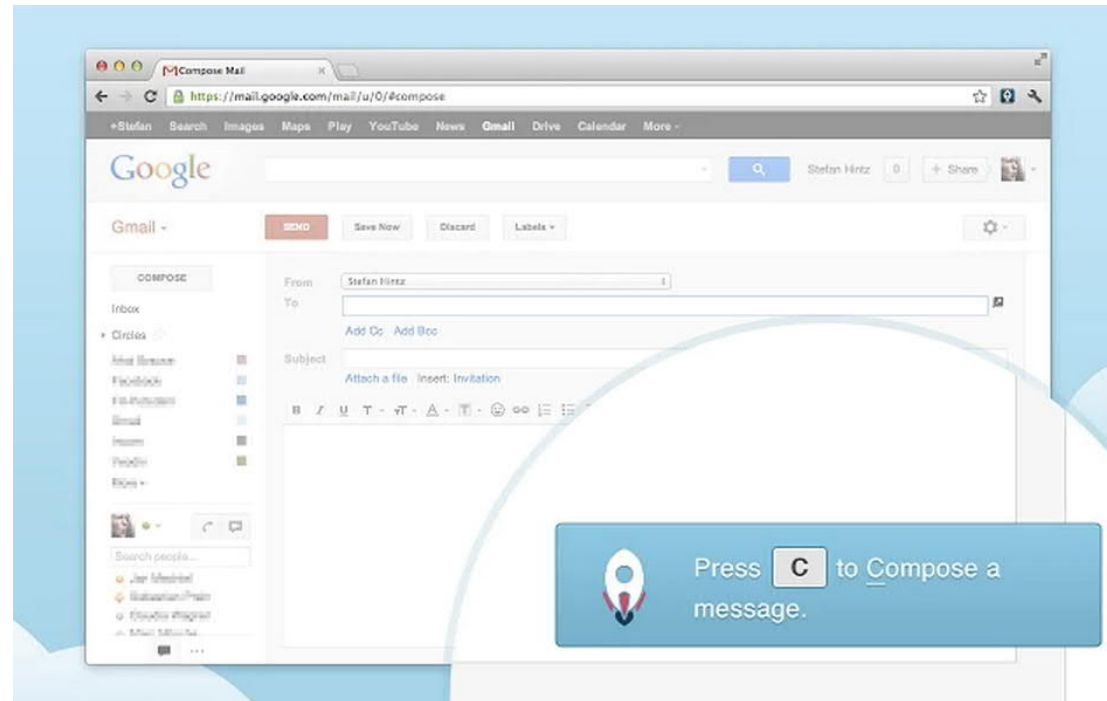
Actions

- `,` : Move focus to toolbar
- `x` : Select conversation
- `s` : Rotate superstar
- `y` : Remove label
- `e` : Archive
- `m` : Ignore conversation
- `!` : Report as spam
- `#` : Move to trash
- `r` : Reply
- `<Shift> + r` : Reply in a new window
- `a` : Reply all
- `<Shift> + a` : Reply all in a new window
- `f` : Forward
- `<Shift> + f` : Forward in a new window
- `<Shift> + n` : Update conversation
- `<Tab> then Enter` : Send mail
- `<Esc>` : Focus last chat mole
- `] / [` : Remove conversation from current view and go previous/next
- `) / (` : Archive conversation and go previous/next
- `z` : Undo last action
- `.` : Open more actions menu
- `<Shift> + i` : Mark as read
- `<Shift> + u` : Mark as unread
- `-` : Mark unread from the selected message
- `<Ctrl> + s` : Save draft
- `+ or =` : Mark as important
- `-` : Mark as not important
- `g then p` : Make a phone call
- `<Shift> + t` : Add conversation to Tasks



Optimize your Inbox

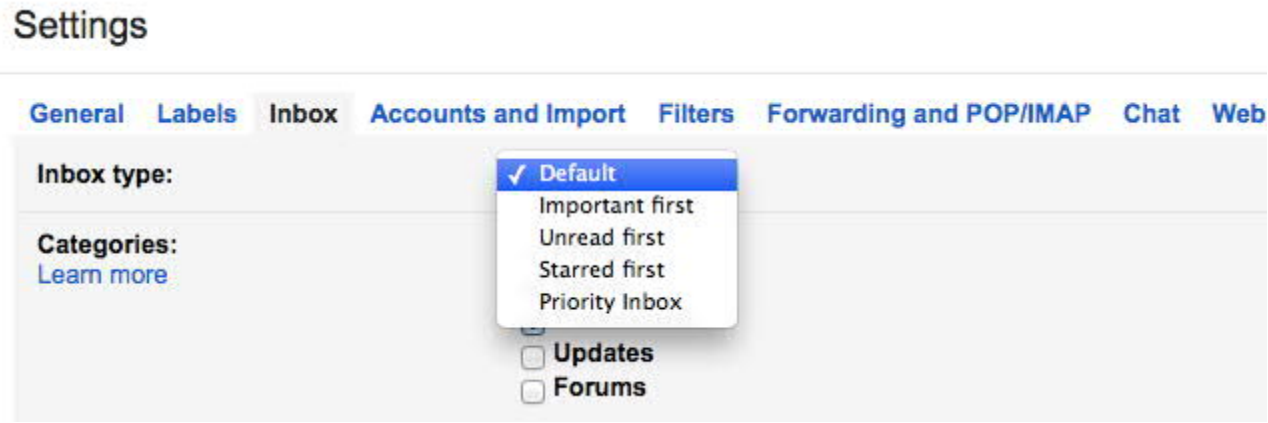
- Keyrocket Chrome Extension for Shortcuts





Optimize your Inbox

- Pick the Inbox Look that Works Right for You



- Default Inbox gives option to enable categories
 - Primary, Social, Promotions, Updates & Forum



Optimize your Inbox

- Pick the Inbox Look that Works Right for You

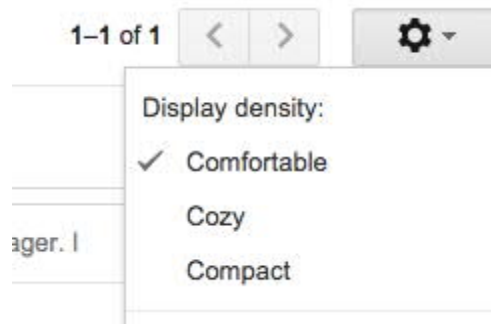
The screenshot shows the Gmail 'Inbox type' settings. The 'Inbox type' is set to 'Important first'. Under 'Inbox sections', there are two sections: '1. Important' and '2. Everything else'. The 'Inbox unread count' is set to 'Unread items in the first section'. The 'Importance markers' are set to 'Show markers'. A dropdown menu for 'Options' is open, showing 'Show up to:' with options for 5, 10, 25, and 50 items. The '25 items' option is selected. Other options include 'Hide section when empty' and 'Remove section'.

- The next four options split your inbox into two or more sections, displaying the inbox's focus first (under a header) and all other emails below it, under subsequent header(s).

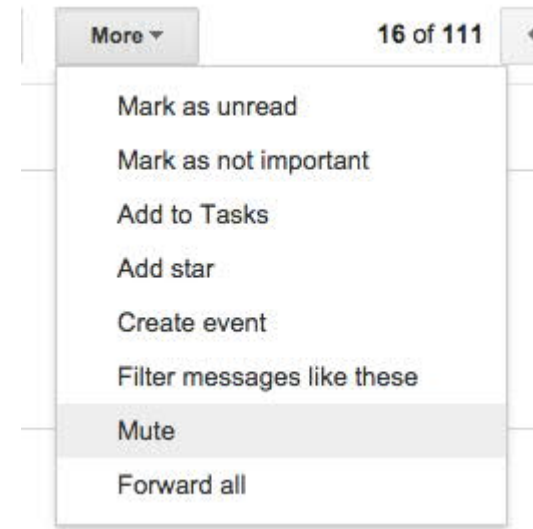


Optimize your Inbox

- Decide on the Best Display Density



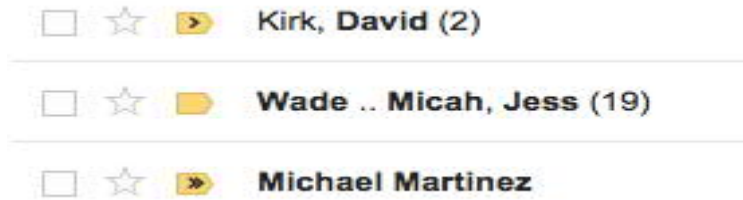
- Mute Group Conversations that don't Concern You





Optimize your Inbox

- Turn on Personal Level Indicators



- The arrows inside the yellow marker indicate:
 - >> - Only to you
 - > - To a group of people
 - No arrow - To a mailing list



Optimize your Inbox

- Customize the Left Navigation

Gmail Settings

COMPOSE

Inbox
Starred
Sent Mail
Drafts
Less ▲

Important
Chats
All Mail
Spam
Trash

▶ Categories
[Manage labels](#)
[Create new label](#)

General Labels **Inbox** Accounts and Import Filters Forwarding

System labels	Show in label list
Inbox	
Starred	show hide
Important	show hide
Chats	show hide
Sent Mail	show hide
Drafts	show hide show if unread
All Mail	show hide
Spam	show hide show if unread
Trash	show hide

Categories	Show in label list
Categories	show hide



Optimize your Inbox

Get All
Your
Email
in One
Place

- Gmail offers the option to put emails from up to five other accounts
- @gmail.com or otherwise—straight into your inbox,
- intermingled with your regular Gmail messages
- you can archive emails from different accounts in one place,
- use one labeling system for all of your accounts,
- and even respond to emails using different profiles



Optimize your Inbox

- To add an account,
 - go to settings,
 - click on the "Accounts and Import" tab,
 - and click "Add a POP3 mail account you own" in the "Check mail from other accounts" section.

Add another email address you own

Enter information about your other email address.
(your name and email address will be shown on mail you send)

Name:

Email address:

Treat as an alias. [Learn more](#)

[Specify a different "reply-to" address](#) (optional)

Settings [User] [Gear]

General Labels Inbox Accounts and Import Filters and Blocked Addresses Forwarding and POP/IMAP Add-ons Chat Advanced Offline

Themes
Change page:

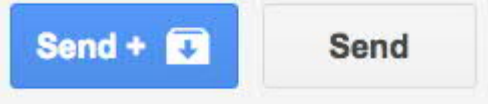
Custom keyboard shortcuts
Enable the ability to customize your keyboard shortcuts via a new settings tab from which you can remap keys to various actions. Enable Disable

Multiple Inboxes
Add extra lists of emails in your inbox to see even more important emails at once. The new lists of threads can be labels, your starred messages, drafts or any search you want, configurable under Settings. Enable Disable



Optimize your Inbox

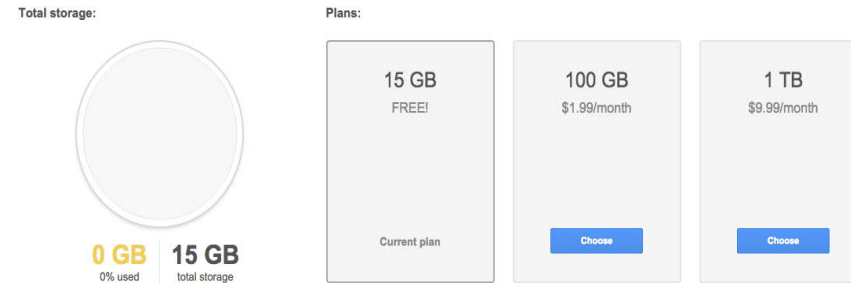
- Archive Everything (?)
 - you can "Archive" it with confidence that you'll be able to find it later.
 - Enable "Send and Archive Option" under settings
 - To enable Send and Archive, go to the gear icon (top right) > Settings. Under the General tab, find Send and Archive and select Show Send & Archive in reply
- Keep in mind however that archiving everything eats into your free 15GB of space





Optimize your Inbox

- Storage Optimization
 - Purchase Extra Storage



- Use an advanced search queries to find-and-destroy large emails

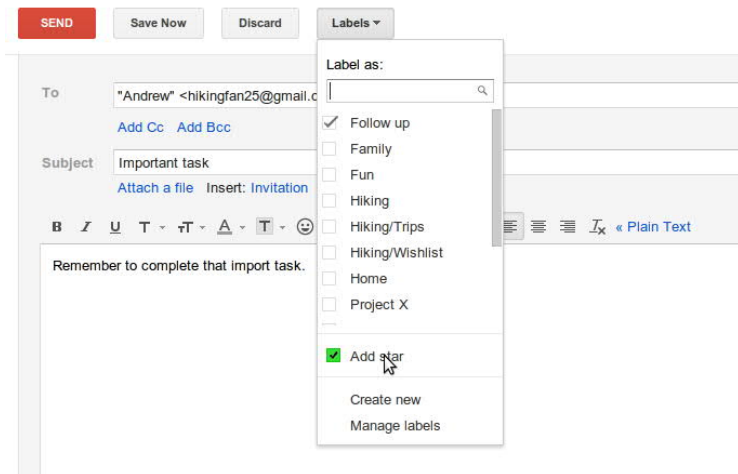
- Use findbig





Make use of Labels

- Find the Labeling System for You
 - Gmail uses labels to tag and organize content into sets that work the way you want.
 - Labels are a great way to narrow the hundreds of messages you receive into manageable, searchable categories
 - They're far more flexible than folders since you can add multiple tags to each message.





Make use of Labels

- Use Coloured stars and dynamic labeling system
 - Gmail has colored stars that you can turn on by going to settings, clicking on the “General” tab, and dragging new stars and icons into your “in use” bucket.



- Leverage Hashtags for Super Deep Labeling





Make use of Labels

- Trigger Automation with a Label (Use Zapier)

Gmail → Trello

New Email → Create Card

WHEN THIS HAPPENS ... *... DO THIS*

Save new Gmail attachments (original file format) to Google Drive [Use this Zap](#)

Create Trello cards from new Gmail emails [Use this Zap](#)

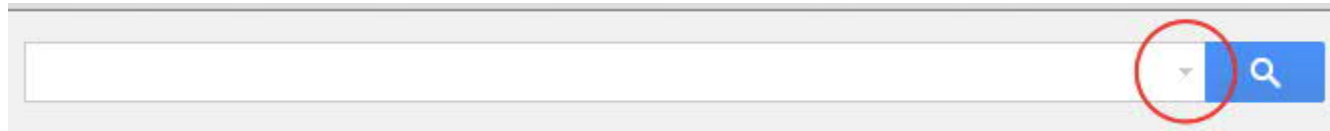
Create Asana Tasks from Emails in Gmail [Use this Zap](#)

See more [Gmail integrations](#) powered by **zapier**



Master Advanced Search and Filters

- Access Advanced Search



- Gmail lets you filter by:
 - Folders
 - Labels
 - Senders and receivers
 - Subject lines
 - Words within the body of the email
 - Messages that include attachments (plus the size of those attachments)
 - The date range when the email was received

The screenshot shows the Gmail Advanced Search dialog box. It features a search bar at the top with a dropdown menu set to "All Mail" and a search icon. Below the search bar are several input fields for filtering criteria: "From", "To", "Subject", "Has the words", and "Doesn't have". There are also checkboxes for "Has attachment" and "Don't include chats". At the bottom, there are fields for "Size" (set to "greater than" and "MB") and "Date within" (set to "1 day" and "of"). A search icon is located at the bottom left, and a link "Create filter with this search" is at the bottom right.



Master Advanced Search and Filters

- Set Up Automation with Gmail Filters

- Filters allow you to automate actions like labeling, priority, or whether or not a message makes it to your inbox

Size **greater than** **MB**

Date within **1 day** of

[Create filter with this search »](#)

- use a from: filter to automatically forward any email to your specified email id or store under specified label or folder

Settings

[General](#) [Labels](#) [Inbox](#) [Accounts and Import](#) [Filters](#) [Fo](#)

The following filters are applied to all incoming mail:



Matches: **from:(danny@zapier.com)**
Do this: Apply label "Freelancing"



Master Advanced Search and Filters

- Use Variations on Your Gmail address to Preemptively Filter
 - Gmail actually ignores dots that are inserted into your email address, and cuts off anything that appears after a plus sign
 - maitrichheda@gmail.com = mai.trich.he.da@gmail.com
 - maitrichheda@gmail.com = MAITRICHHEDA@gmail.com
 - maitrichheda@gmail.com = MaitriChheda@gmail.com
 - maitrichheda@gmail.com = maitrichheda+spam@gmail.com
- Valuable uses of such combinations
 - Can be used along with filters for newsletters subscriptions etc which can be automatically archived
 - Can be given at Stores and promotions and archived



Master Advanced Search and Filters

- Use Bulk Operations to Quickly Tag Emails
- Problem : “ Bulk emails received by Tax authorities in your inbox, on behalf of your client. Categories could vary from Intimations u/s 143(1) to Receipt of ITR-V at CPC Bangalore to Reminder to file ITR”
- Solution :
 - Start by searching for the word, which should show most of the messages you're targeting
 - Check the box to the left of each email which needs a label
 - If you want to select every message in that initial search, check the "master checkbox" below the search box. Once you do, a prompt will appear asking if you want to "select all conversations that match this search."
 - Click on the label drop-down, and choose a label to apply to your selected conversations
 - You can also perform a bunch of other bulk operations on a group of selected messages, like adding stars, marking as read or unread, moving them to your inbox, archiving them, or setting an importance level.



Undo Send Option

- Un-send emails on Gmail

Settings

General Labels Inbox Accounts and Import Filters and Blocked Addresses Forwarding and POP/IMAP Chat Labs Offline Themes

Default text style:
(Use the "Remove Formatting" button on the toolbar to reset the default text style)

Sans Serif - \sqrt{T} - | Δ - | \bar{J} \times

This is what your body text will look like.

Conversation View:
(sets whether emails of the same topic are grouped together)


Conversation view on
 Conversation view off

Email via Google+:
[Learn more](#)

Who can email you via your Google+ profile? ∇
If people who aren't in your circles send you email this way, you must agree before they can send you more.

Send and Archive:
[Learn more](#)

Show "Send & Archive" button in reply
 Hide "Send & Archive" button in reply

Undo Send: 

Enable Undo Send
Send cancellation period: ∇ seconds

Stars:
Drag the stars between the your mouse over the image. The stars will rotate in the order shown below when you click successively. To learn the nar

Presets: 1 star 4 stars 30 15



Gmail Snooze

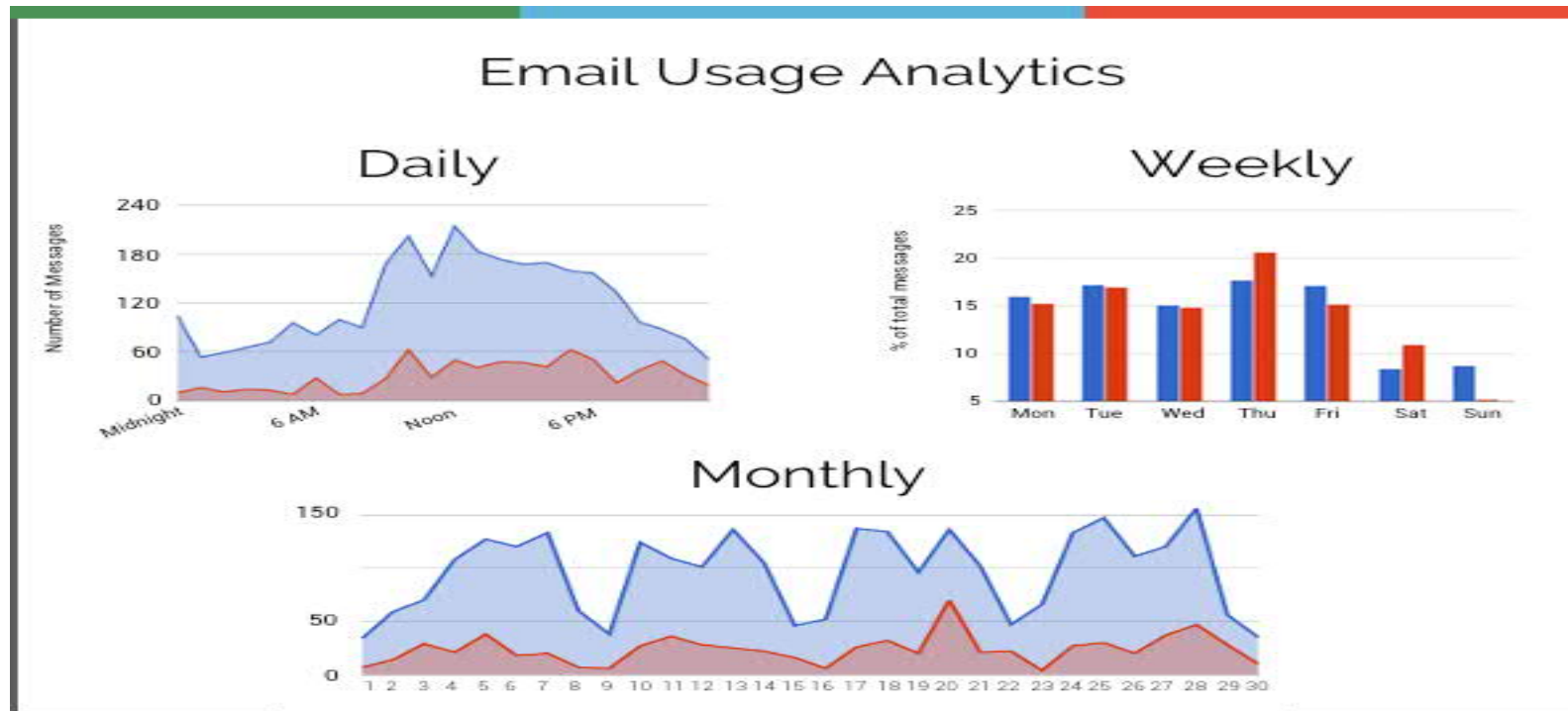
- Snooze email until later

The screenshot shows the Gmail interface with the 'Snooze Email Until' dialog box open. The dialog box is titled 'Snooze Email Until' and has a text input field containing 'June 18, 2014 8:00am'. Below the input field is a section titled 'Frequently Used Times' with the following options: 'one hour from now', 'tomorrow at 8am', 'next monday, 8am', 'one week from today', 'beginning of next month', and 'six months from now'. There is also a checkbox for 'Only if no one replies'. At the bottom of the dialog box, there is a highlighted yellow box with the text 'This email will be snoozed until: Wednesday June 18th, 2014 8:00am PDT' and a red 'SNOOZE' button. Below the button, it says 'Snoozed messages will be archived now, then bumped to the top of your inbox at the scheduled time'. The background shows the Gmail inbox with several emails, including one from 'Streak Test' and another from 'Aleem Mawa'.



Valuable Add-ons, Mobile Apps and More





- Visualize Volume with Gmail Meter (Free Google add on)





Valuable Add-ons, Mobile Apps and More

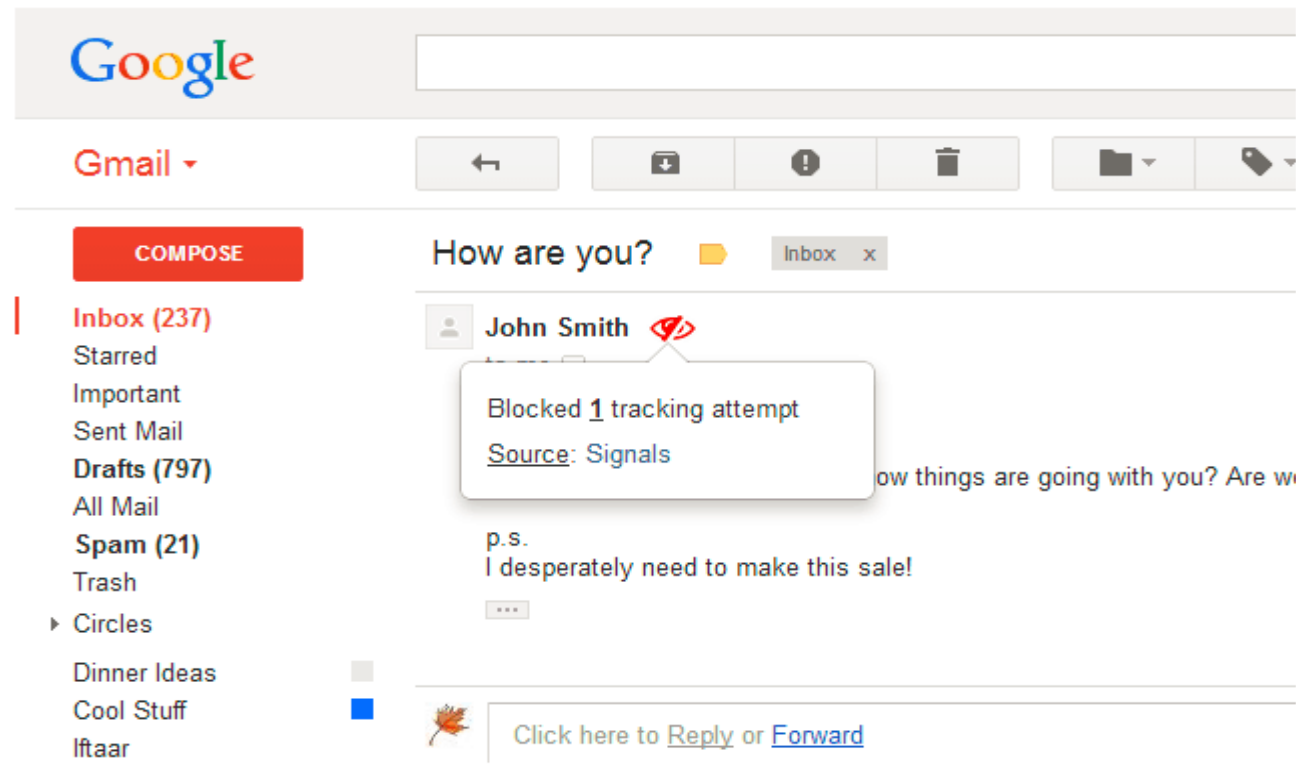
- Turning your Gmail into Tasks Manager

	Taskforce Offered by: www.taskforceapp.com ★★★★☆ 212 Productivity 9,272 users	Available on Chrome
	RightTasks for Gmail™ Offered by: ghinda.net	Available on Chrome
	Todoist for Gmail Offered by: todoist.com	Available on Chrome
	ActiveInbox: Organize Gmail™ tasks Offered by: www.activeinboxhq.com ★★★★★ 635 Productivity 19,281 users	Available on Chrome



Valuable Add-ons, Mobile Apps and More

- Pixel Block : Chrome Extension that blocks access to senders who want to track your behaviour regarding their email.





Valuable Add-ons, Mobile Apps and More

- Unsubscribe with Speed using Unroll.me

The screenshot shows the Unroll.Me interface. At the top, the Unroll.Me logo is displayed. Below it, a message states: "We're currently scanning your inbox. So far we've found 55 subscriptions." A progress bar is visible below this message. Further down, another message says: "Scanning can take up to 2 minutes. Don't want to wait? [Notify me by email when finished.](#)" Below this is a preview of the email subscription list, which includes the following entries:

Subscription Name	Sender Domain	Actions
freecreditscore.com	freecreditscore.com	Unsubscribe Stop rolling up
FreeCreditScore.com Customer Support	Qemailserver.com	Unsubscribe Stop rolling up
Google Offers	Google.com	Unsubscribe Stop rolling up
gazelle	gazelle.com	Unsubscribe Stop rolling up
Get Kosher	Getkosher.com	Unsubscribe Stop rolling up



Valuable Add-ons, Mobile Apps and More

- Unsubscribe with Speed using The Swizzle

The screenshot shows the Swizzle website interface. At the top, there is a search bar with the text "Search for brands and offers". To the right of the search bar are navigation links: "Digest", "Browse", "Sweep 0", and a settings icon. Below the navigation bar, the page is divided into two main sections. On the left, under the heading "DIGEST", there is a list of "My Daily Digest" items, including "Blade HQ", "Google+", "Jill Jepson (via Twit...)", and "Twitter". On the right, under the heading "YOUR SWEEP RESULTS (12)", there is a list of email newsletters to be unsubscribed from. Each entry includes the sender name, email address, and a sample subject line. To the right of each entry are two icons: a green one with a document symbol and a blue one with a trash can symbol. A "Done" button is located at the top right of the "YOUR SWEEP RESULTS" section.

Sender	Email Address	Sample Subject	Actions
Medium Daily Digest	noreply@medium.com	Sample subject: Behind the Nation's Closed Doors	Unsubscribe, Delete
Anna at RealtimeBoard	boyrskins@realtimeboard.com	Sample subject: We Miss You at RealtimeBoard	Unsubscribe, Delete
Death to The Stock Photo	david@deathtothestockphoto.com	Sample subject: Justin's Lake Adventure - Monthly Photo Pack #13	Unsubscribe, Delete
YouTube	noreply@youtube.com	Sample subject: JaBig: "Ibiza Summer House Music 2014 Nonstop Party & Lounge Playlist Mix" and more videos	Unsubscribe, Delete
Canva	canva@canva.com	[DESIGN 101] Five Tips for Pro Design	Unsubscribe, Delete
Duolingo	no-reply@duolingo.com	Make the most out of Duolingo: Apps to learn on the go, scientifically proven learning	Unsubscribe, Delete



Valuable Add-ons, Mobile Apps and More

- Rapportive : create stronger connections with the people you are emailing.

Check out Rapportive

Rahul Vohra rahul@rapportive.com to me

show details 26 Sep Reply

Hey yo, I'm coming down to Mountain View this evening. Holler if you're about!

Super-excited: @rapportive just raised \$1M from an all-star lineup of investors! Now the real work begins :)

Facebook ADD FRIEND

LinkedIn CONNECT

Skype

Recent Mail COMPOSE

Add a note on this person...

Your notes are private: only you can read them.

feedback | privacy | my profile | rapportive

Mention shared interests and recent tweets

Follow on LinkedIn, Twitter, Facebook, and more

Leave notes for later



Valuable Add-ons, Mobile Apps and More

- Save Favorite Filters with Quick Links (Chrome Extension)



Gmail Quick Links

Offered by: Kevin Wu

★★★★★ 33 | Productivity | 1,673 users

Available on Chrome

- Read Gmail Offline



- It's a Chrome extension that allows you to read, respond to, search, and archive emails without an Internet connection.



Valuable Add-ons, Mobile Apps and More

- Send Email Later (Boomerang for Gmail – Chrome Extension)

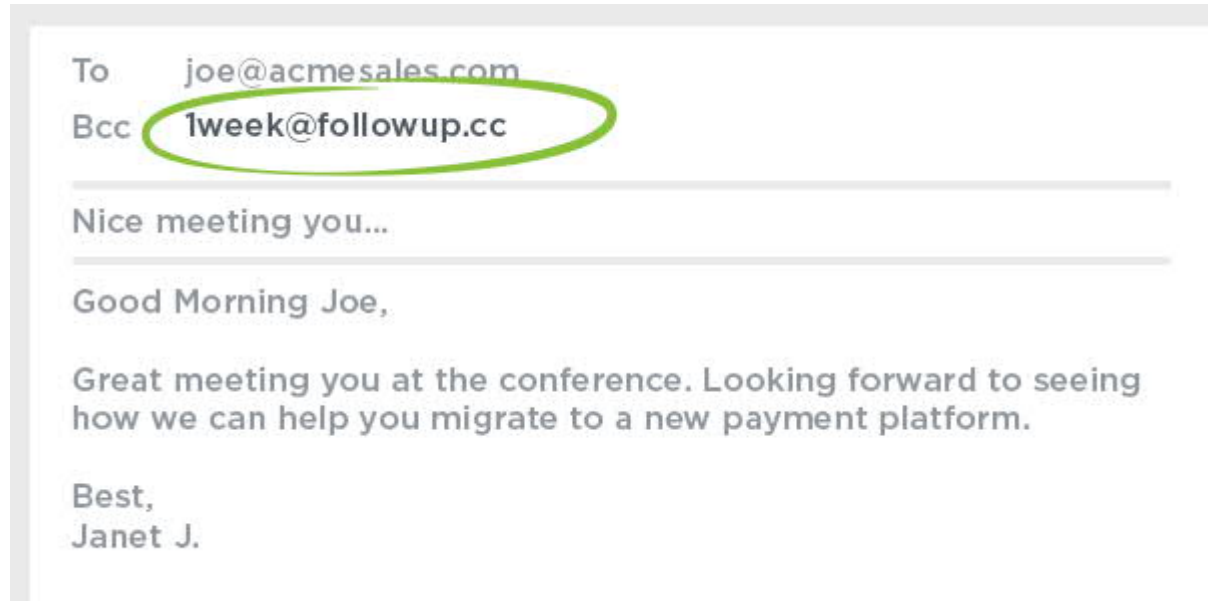
The screenshot shows the Gmail interface with the 'Boomerang' extension installed. The email being viewed is from Mai-Chi Vu, titled 'Concert tickets', and includes a PDF attachment named 'PK-082113-Tickets.pdf'. The 'Boomerang' menu is open, displaying the following options:

- Return Conversation to Inbox:
- Only if nobody responds
- In 1 hour
- In 2 hours
- In 4 hours
- Tomorrow morning
- Tomorrow afternoon
- In 2 days
- In 4 days
- In 1 week
- In 2 weeks
- In 1 month
- At a specific time
- Examples: 'Monday 9am', 'Dec 23'
- 10/24/2013 8:00 AM
- Confirm
- Customize This Menu
- Random time



Valuable Add-ons, Mobile Apps and More

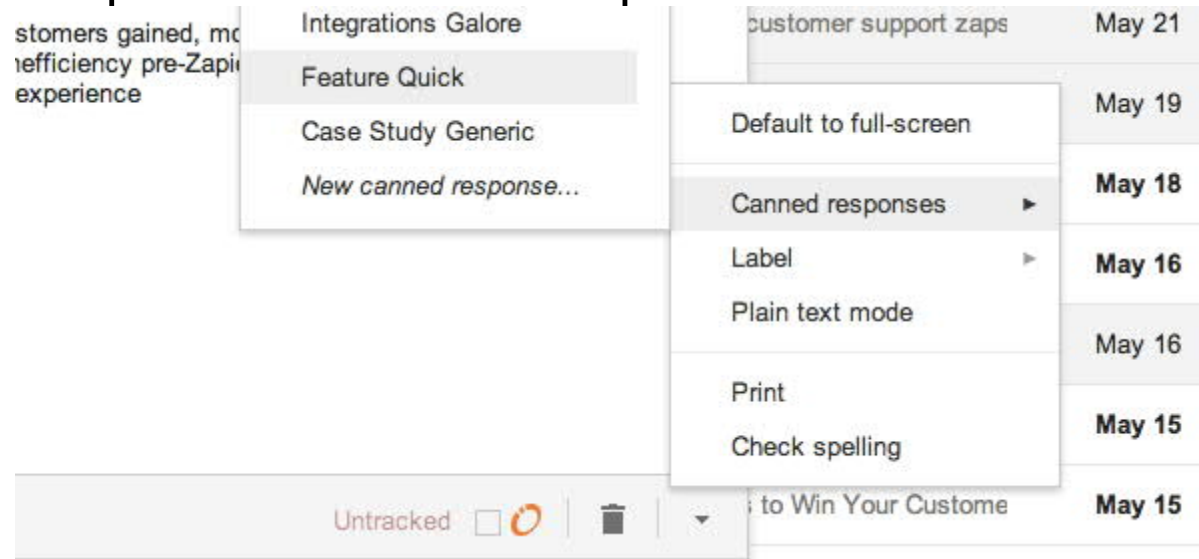
- Set Email Reminders (Followup.cc)





Valuable Add-ons, Mobile Apps and More

- Use Canned Responses for Quick Replies



- create an easy to access template for standard replies
- To access the feature, click the "More options" arrow at the bottom right of a compose window and either select, add or delete a canned response.



Valuable Add-ons, Mobile Apps and More

- Download your Emails, Google Plus Data, Calendar Data

Google

Accounts Download a copy of your data Create an archive My archives

Account

- Account Activity
- Dashboard
- Download your data
- Me on the Web

Security

- Profile and privacy
- Google+
- Products

Mail

Gmail labels

Include all of your mail

Select labels

[Gmail labels](#)

Mail is provided in the MBOX format. [Learn more](#)

Done Cancel

Calendar <1 MB

Calendars

Include all calendars

Select calendars

[Calendars](#)

Calendar data is provided in the iCalendar format. [Learn more](#)

Done Cancel



Task Management

CA Ashwin Dedhia

Why Task Management for CA's

- Do you have to work Extra around Deadlines
- Are you forced to compromise on detailed review for want of time
- Is Tracking Assignment Status a challenge
- Facing challenges finding the final draft

Globally Task Management tools are used by Individuals | Teams | Organizations to work Efficiently, Reduce waste, Stay organized and Meet Deadlines.

Key Components of Task Management Tools

- Organization
 - At its most basic level, a task management tool is used to help individuals, teams or businesses stay organized. Part of being organized includes setting priorities for tasks, visualizing the progress of tasks as they pass through stages of completion and compiling analysis or reports to direct future tasks and workflows.
- Prioritization
 - A [task board](#) lets you organize your tasks by priority so you can ensure that the most important things are completed first. That being said, task management tools are easy to update. By prioritizing tasks we are able to focus on how work should be attacked, rather than jumping from one item to another without any direction.
- Visualization
 - Not only will visualizing tasks help you remember what you need to do, but it helps you better understand a project as a whole. This means task management tools are easily accessible by everyone. When every item is laid out in a way that is easy to comprehend, dependencies become clear and collaboration is natural.
- Analysis
 - Task management tools produce concrete data that can be reviewed and digested so end users can easily grasp what they are doing, what they have done and how things can be done better. Task management tools always provide for some form of analysis, whether it is a formula that you have created or something built into the tool. This is an essential part improving the way things get done.

Benefits of Using a Task Management Tool

Work smarter, get more done and experience more success.

- Manage and organize workloads – Know what you have to do and which items have priority. Assign and execute.
- Prioritize Tasks – Ensure you and your team doesn't get lost in not-very URGENT tasks
- Increase Efficiency and Productivity – Applying an optimal amount of resources and time to a task equals smaller turnarounds in the production cycle.
- Improve Quality of work – Quality is never sacrificed for speed of production when tasks are organized and information is correctly utilized.
- Drive Collaboration – Teams work better when there is a shared understanding of what needs to be done and ideas are easily communicated through a visual task management system.
- Reduce waste – Eliminate time spent thinking of what to do next or reworking tasks that were not completed correctly on the first attempt.
- Meet Deadlines – With an organized task management system you and your team work more efficiently making missed deadlines a thing of the past.

Points to consider when looking for a Task Management Tool.

- Assignment Undertaken
- Team Size
- Remote Working
- Data Analysis
- Integration with other systems or applications
- Approach for getting Things done

Points to check before you select the right project management software for your team

- Review your workflow
- List your work requirements
- Value of your team's buy-in
- Allow time for learning curve
- Understand available budget

Alternative Task Management Solutions

- [www.google.com \(tasks\)](http://www.google.com/tasks)
- www.hitask.com
- www.taskque.com
- www.Madreacha.com/jamku
- www.MyTask.co
- www.CADashboard.com
- www.caofficeautomation.com
- www.erpca.com
- www.admin4ca.com
- www.cordl.in



Collaborative Working

CA Adarsh Madrecha



Content
Collaboration



Data
Collaboration

Content Collaboration

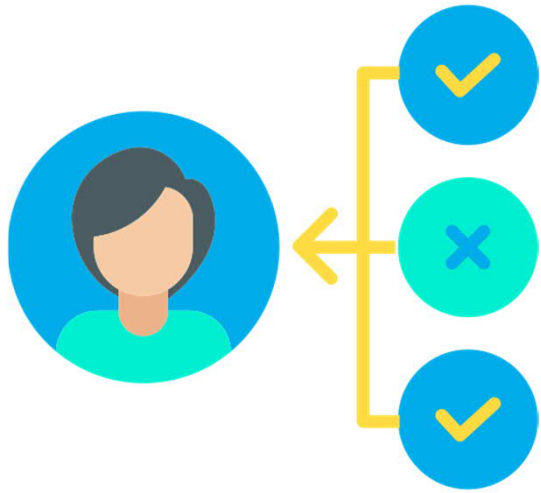


OneDrive

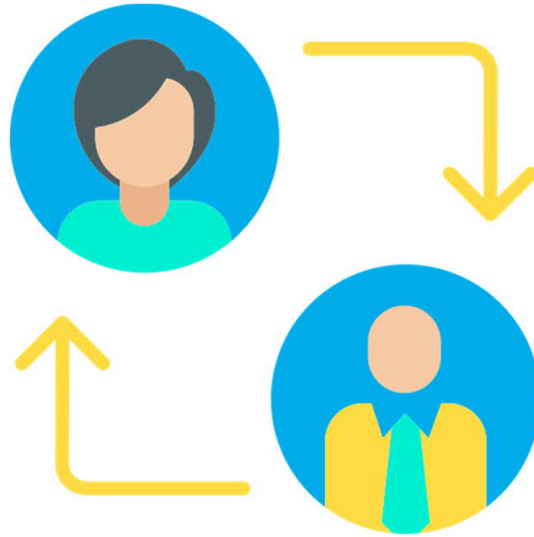


Google Drive

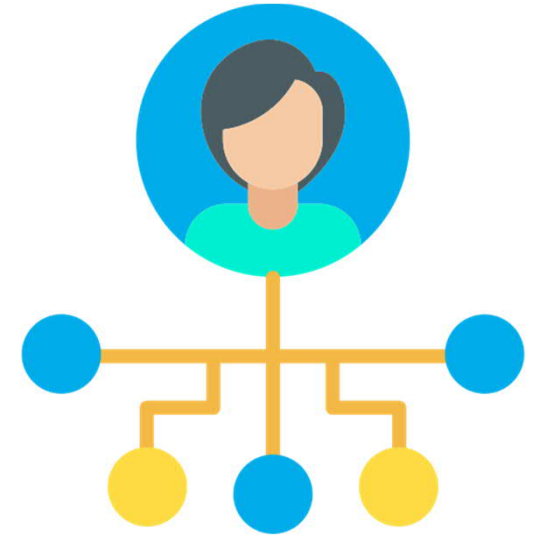
Features of Content Collaboration



Review & Comment



Avoid back & Forth Sending



Easy Dissemination

Office 365 Price

Office 365 Home

5300 Rs Per Year

6 Users \times 5 PC = 30 PC

175 Per PC per Year

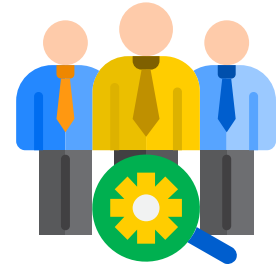
Data Collaboration



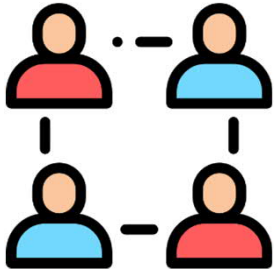
Access Managed
Sharing



Bird's Eye View



Single Source
of Truth



Information
Communication



Transparent
Logs



Progress
Tracking

Options



Jamku

1000



CA Dashboard

1100



My Task

1150



CA Office
Automation

1800



CCH iFirm

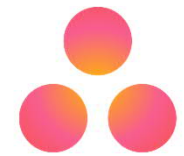
2800

Price per user per year

General Purpose



Microsoft Teams




asana



Details



Task Name	Task Team	Client Name	Year	Period	Records Rec... 1 ↓	Entries Done 2 ↓	Cheque Deposit... 3 ↓
GSTR3B	PoojaS,PranaliShinde	Mangilal Prabhulal Rebari - Baba Ra...	2020	Nov	Yes	Yes	Yes
GSTR3B	KajalJadhav,NityaS,Dh...	Manoj Sohanraj Mehta - Nakoda Je...	2020	Nov	Yes	Yes	Yes
GSTR3B	NityaS,ShilpiShreya	Neon Catalysts Pvt Ltd - Neon Catal...	2020	Nov	Yes	Yes	Yes
GSTR3B	KajalJadhav,PoojaS,Dh...	Rajendra Bhimraj Jain - Madhuram ...	2020	Nov	Yes	Yes	Yes
GSTR3B	PoojaS,KajalJadhav	Sunita Shivprasad Mishra - Abhishe...	2020	Nov	Yes	Yes	Yes
GSTR3B	KajalJadhav,PoojaS	Supriya Amit Yadav - SafeKart Enter...	2020	Nov	Yes	Yes	Yes
GSTR3B	DhanashriJ,PoojaS,Kaj...	Azad Shripat Chauhan - Shree Sai El...	2020	Nov	Yes	Yes	
GSTR3B	DhanashriJ,PoojaS	Bharat Sohanraj Mehta - Shree Nak...	2020	Nov	Yes	Yes	
GSTR3B	ShilpiShreya,PranaliShi...	Mangilal Mehta - Manolal and Com...	2020	Nov	Yes	Yes	
GSTR3B	KajalJadhav,Dhanashri...	Sureshkumar Jain - Shilpin Jewellers	2020	Nov	Yes	Yes	
GSTR3B	KajalJadhav,DhanashriJ	Vanita Dilip Saraf - Nakoda Electricals	2020	Nov	Yes	Yes	
GSTR3B	PranaliShinde,Dhanas...	Kedar Gajanan Ghate - 3D Edge	2020	Nov	Yes		
GSTR3B	KajalJadhav,ShilpiShre...	Nitinkumar Tejpal Jain - Woods Villa	2020	Nov	Yes		
GSTR3B	KajalJadhav,PoojaS,Dh...	Arjunsingh Rathod - Chamunda Jew...	2020	Nov			
GSTR3B	NityaS,ShilpiShreya,D...	Jagdish Dhanraj Jain - Sangeeta Ha...	2020	Nov			



Document Management

CA Maitri Chheda

Why do I need to learn this?





Variety of e-content being generated by Small to medium offices in daily routine?



Spreadsheets :
Balance Sheets,
Projections,
Summaries, Working
files etc



Word Files :
Letters,
Representations,
Reports,
Submissions etc



Powerpoint :
Presentations of
various Seminars,
Business projections,
Audio Visuals etc

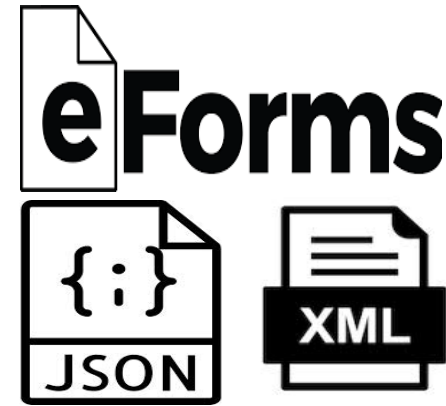
Variety of e-content being generated by Small
to medium offices in daily routine



Scanned Documents and PDFs: For Income Tax, ROC, Eproceedings, Received from Clients

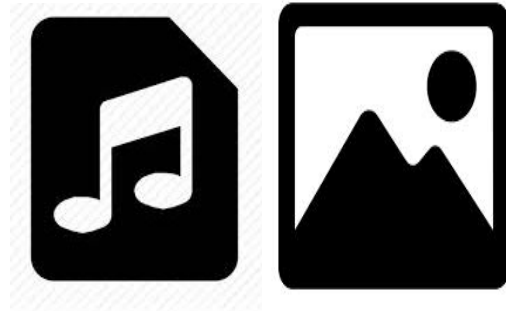


Emails and Attachments: From Clients, Authorities, Colleagues

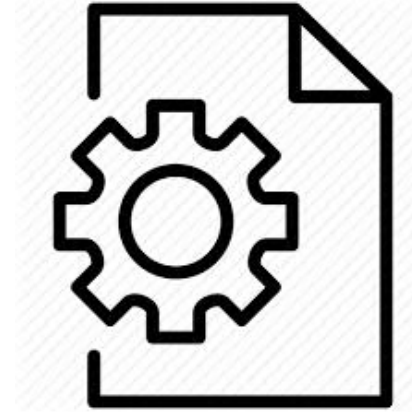


Eforms : ROC, Income Tax, GST etc

Variety of e-content being generated by Small to medium offices in daily routine



Voice and Image
Files: Screenshots,
Lecture Recordings,
Songs, etc



Various Setup files and
Program Backup Files :
Software setups like
Emsigner, Java, KDK,
WinZip, PDF merger and
Splitter etc

Variety of e-content being generated by Small
to medium offices in daily routine

Variety of e-content being generated by Small to medium offices in daily routine

- Word Documents : Letters, Representations etc
- Spread Sheets – Balance Sheets, Projections, Summaries etc
- Presentations – Power points, Audio Visuals, etc
- E forms – Income Tax, Sales Tax (Old), Service Tax (Old), ROC, GST etc
- Scanned Documents
- PDFs – Notices, Circulars etc
- Emails – Communications, Information Exchange, conversations etc
- Voice Files, Images, etc
- Application files, set-ups, etc



I THINK HE'S
GONE TO LUNCH
BUT I CAN'T
BE SURE....



Need for Digital Documents Management System

Scenario : A client has received MVAT/CST notice for FY2007-08 and requires a copy of J1/J2 or Form704 filed during that year.



Need for Digital Documents Management System

This was 10 years ago. Where is the file?



Need for Digital Documents Management System

Scenario : Client sent you some IT-Scrutiny Detail over Whatsapp/Email, 1 week ago.. And has now called you to discuss it.



Need for Digital Documents Management System

Data sent over E-Mail and Whatsapp, where is the file?



Need for Digital Documents Management System

Scenario : Employee A is working on Client X's CMA Data. He is on leave/not reachable.



Need for Digital Documents Management System (Technique)

He saved this working file somewhere on his Computer..
Where is the file?





Need for Digital Documents Management System



To ensure that you can find what you're looking for, even if you're looking for it years after its creation.

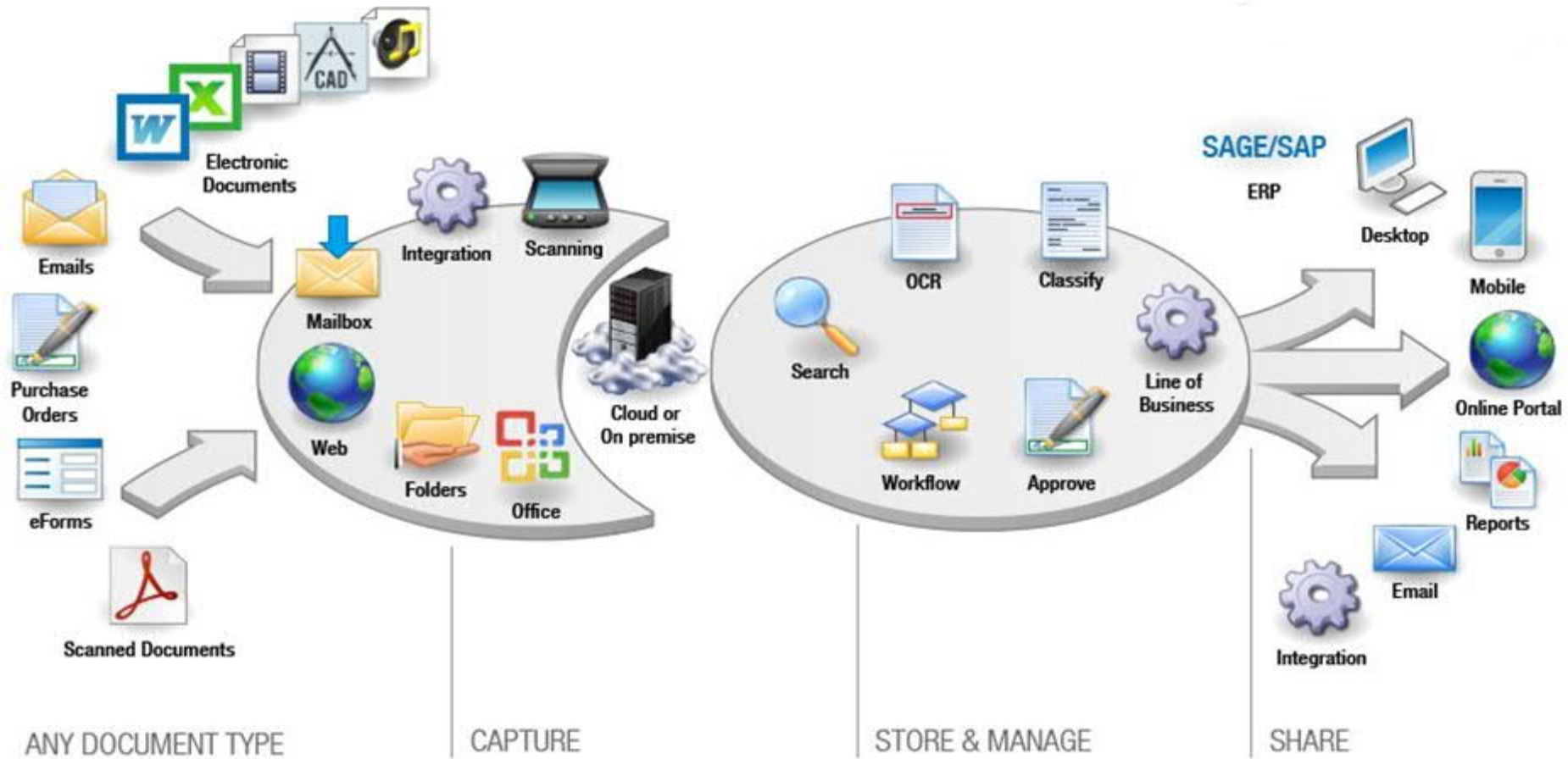


To Avoid embarrassing position of having a client call and not being able to quickly locate the relevant important documents.



To be able to easily locate any documents created or managed by any of your employees who is absent (temporarily or permanently!).

Good File Management Makes Finding What You Want Easy



Does your Desktop look like this?





“Think this is bad? You should see the inside of my head.”

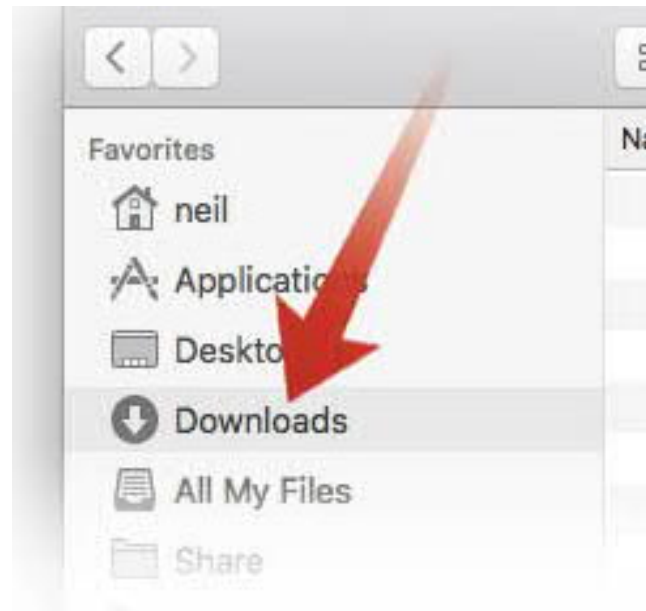
Document Management – Key components



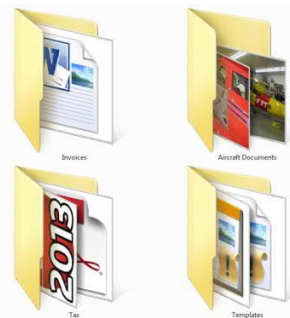
There are six basic components of DMS:

- Capture of documents for bringing them into the system
- Storing and archiving methods
- Indexing and retrieving tools for document search
- Distribution for exporting documents from the systems
- Security to protect documents from unauthorized access

Do all your downloads/Email attachments go to download folder?



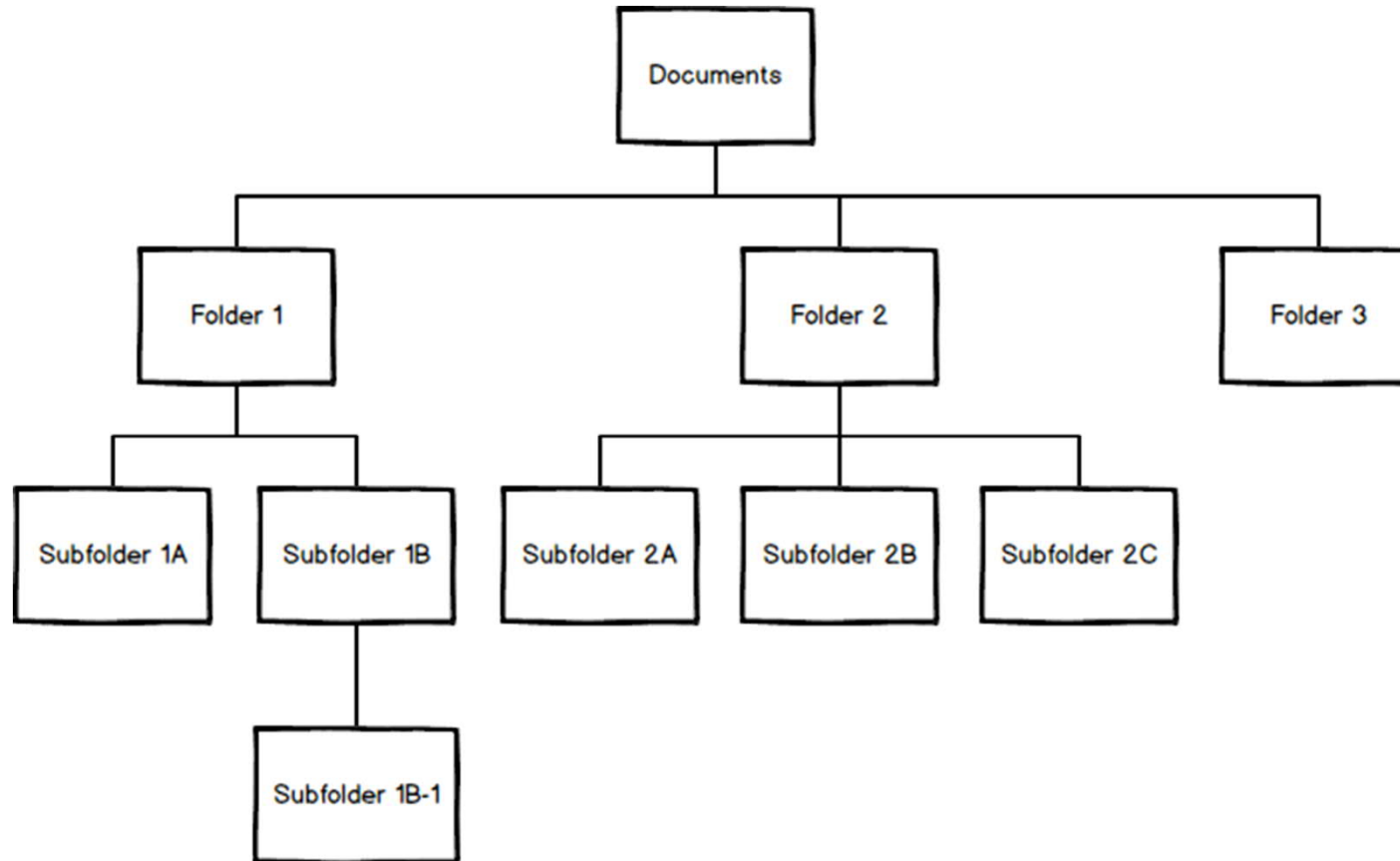
Organization is the Key



One place for all documents – In Standalone or shared Environments

Having a single location for all documents makes it easier to find things and to run backups and archives.

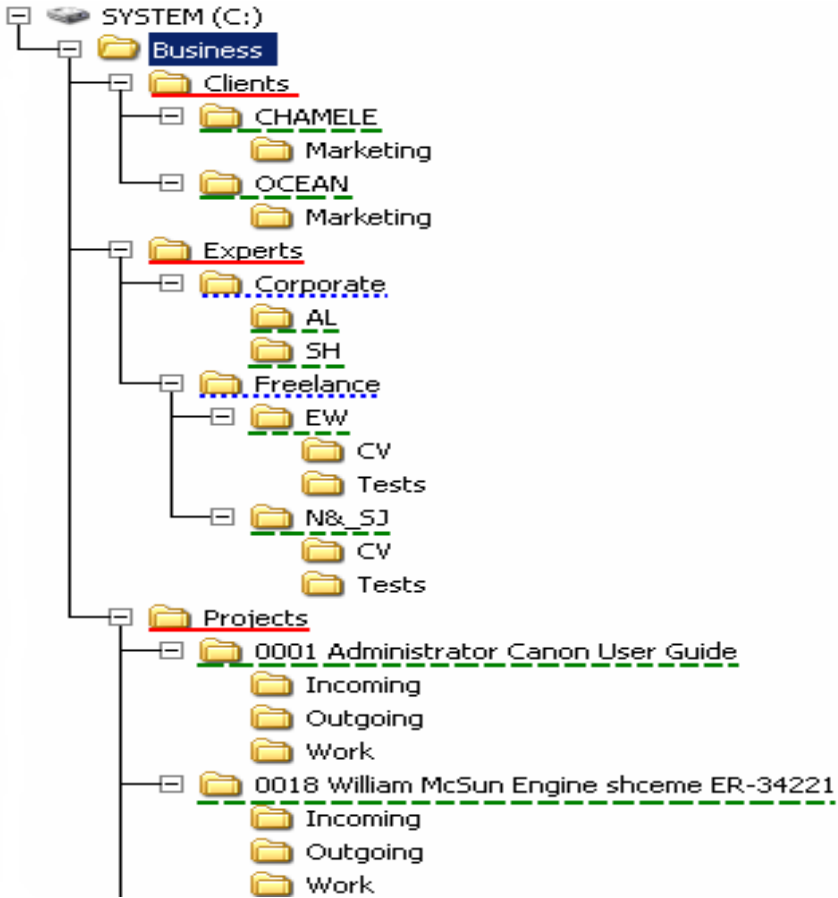
Create folders in a logical hierarchy



Create folders in a logical hierarchy

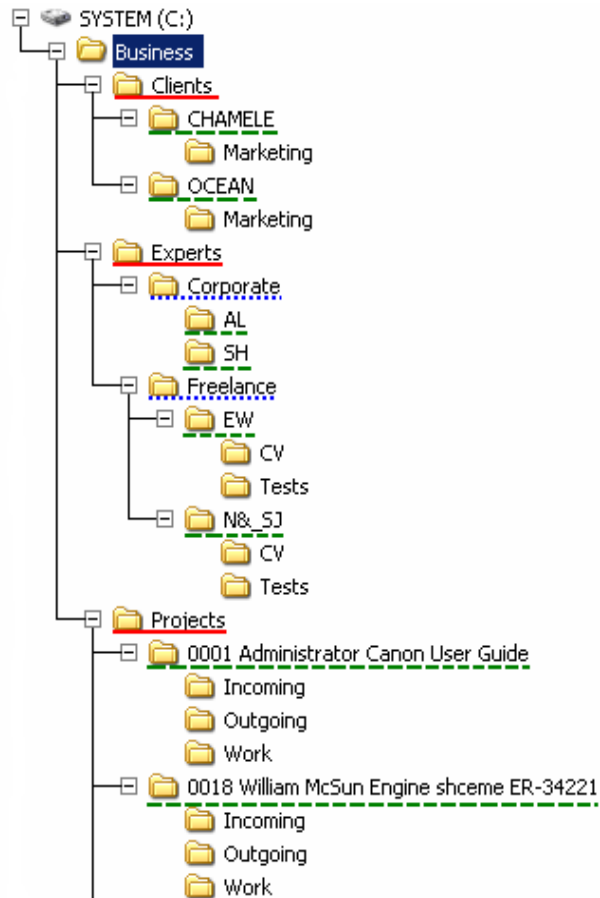
Name	
▼	Folder 1
▼	Subfolder 1A
▼	Subfolder 1B
▶	Subfolder 1B-1
▼	Folder 2
▶	Subfolder 2A
▶	Subfolder 2B
▶	Subfolder 2C
▼	Folder 3

Create folders in a logical hierarchy



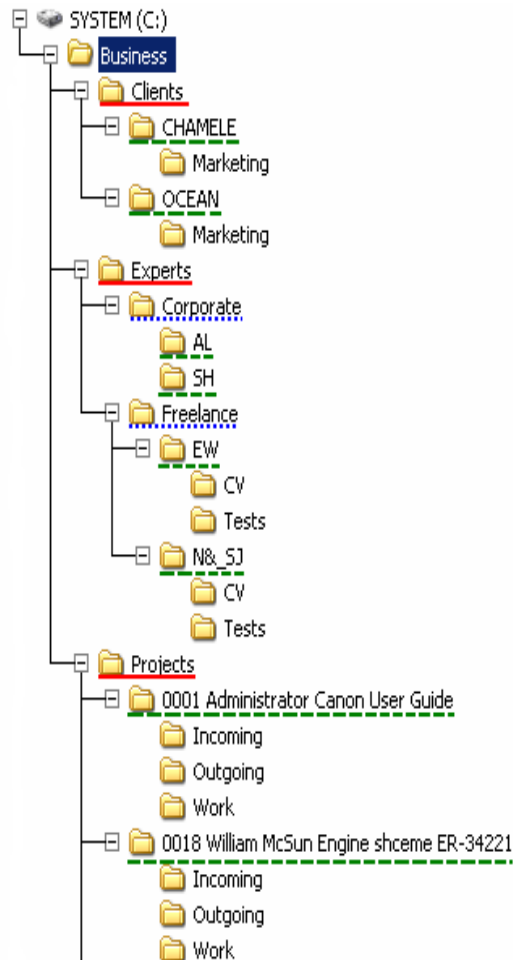
Name
▼ Folder 1
▼ Subfolder 1A
▼ Subfolder 1B
▶ Subfolder 1B-1
▼ Folder 2
▶ Subfolder 2A
▶ Subfolder 2B
▶ Subfolder 2C
▼ Folder 3

Folder creating Tips



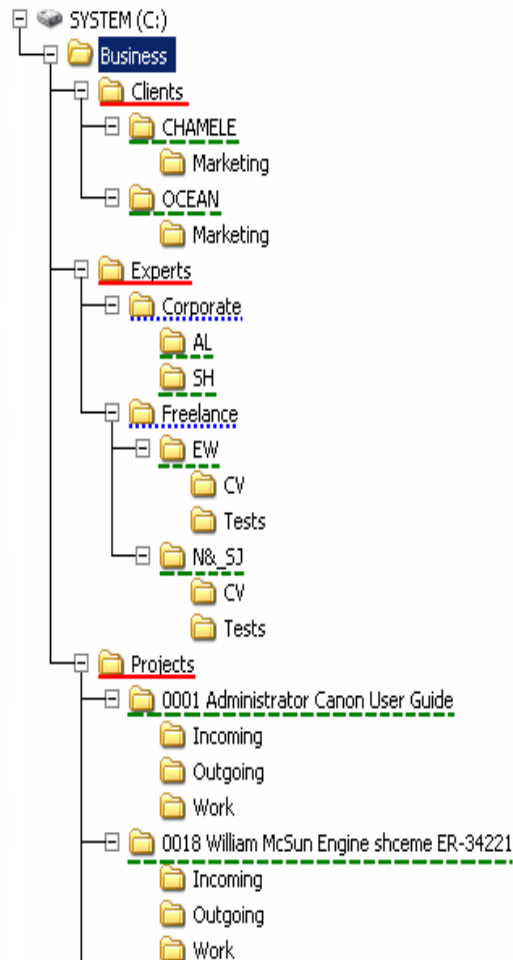
- Create folders in a logical hierarchy
- Use plain language to name your folders
- Nest folders within folders.
 - Caution : Do not Over nest, use descriptive file names instead.
- If you have 15 subfolders under every folder, though, you might want to reconsider your strategy.
- At this point, subfolders stop being helpful and start causing workflow problems.

What Makes a Good Folder Structure?



- The best folder structure is the one that mimics the way you work.
- Browsing through your folders and finding files should be intuitive
- If your method of organization is tedious, it's going to be tough for the rest of your team to follow along.
- Pick something that works well for everyone in the team, since everyone may not search for a file or folder in the same way you do.
- If you want to maintain your folder structure long-term, you'll want to make sure everyone understands (and hopefully likes!) the system.







Few tricks to help your file structure be successful



- Create a template/Blue Print/ Flow chart
 - Repeat the Template for all Clients/Years/Projects
- Think of folder names as keywords
 - Keep in mind that you can search for files using folder names; the more specific, the more quickly you'll find what you're looking for.
- Keep folders unique
 - Make sure there's no overlap in what goes into your folders (e.g., there shouldn't be two places you're keeping same file).







Effective Folder Structures to Organize Files

- Step 1 : Figuring out your Top level Folder
 - The first step to building an effective folder structure is figuring out your top-level folder.
 - Client wise, Assessment Year wise, Field wise..
- Step 2 : Strategies for Subfolders
 - Once you've worked out your top-level folder, it's time to organize your subfolders

 e-filing16-17	28/09/2018 12:29 ...	File folder
 e-filing16-17Working	16/02/2018 11:25 ...	File folder
 e-filing17-18	26/10/2018 7:45 PM	File folder
 e-filing17-18Working	30/03/2018 1:18 PM	File folder
 e-filing18-19	03/12/2018 1:19 PM	File folder
 e-filing18-19Working	03/12/2018 1:19 PM	File folder

Effective Folder Structures to Organize Files

- Step 2 : Strategies for Subfolders
 - Once you've worked out your top-level folder, it's time to organize your subfolders
 - "Working," "final," and "archive" subfolders
 - "To review" and "from review" subfolders
 - "Year" or "client" folders
 - Tagging or Creating shortcuts - Right click >> Properties >> Details >> Tags

 e-filing16-17	28/09/2018 12:29 ...	File folder
 e-filing16-17Working	16/02/2018 11:25 ...	File folder
 e-filing17-18	26/10/2018 7:45 PM	File folder
 e-filing17-18Working	30/03/2018 1:18 PM	File folder
 e-filing18-19	03/12/2018 1:19 PM	File folder
 e-filing18-19Working	03/12/2018 1:19 PM	File folder

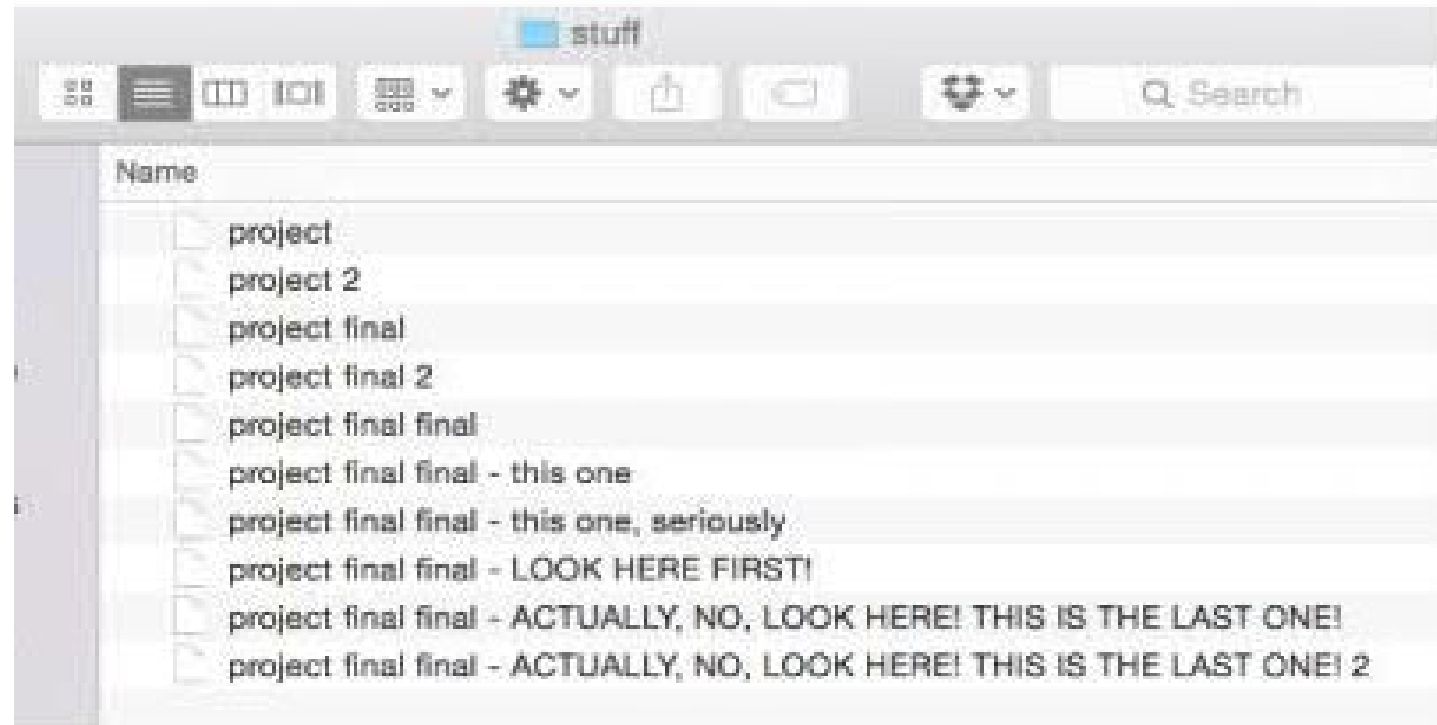
Organizing your folder structure is only half the battle. Keeping your computer organized will also require tidying up your file names.



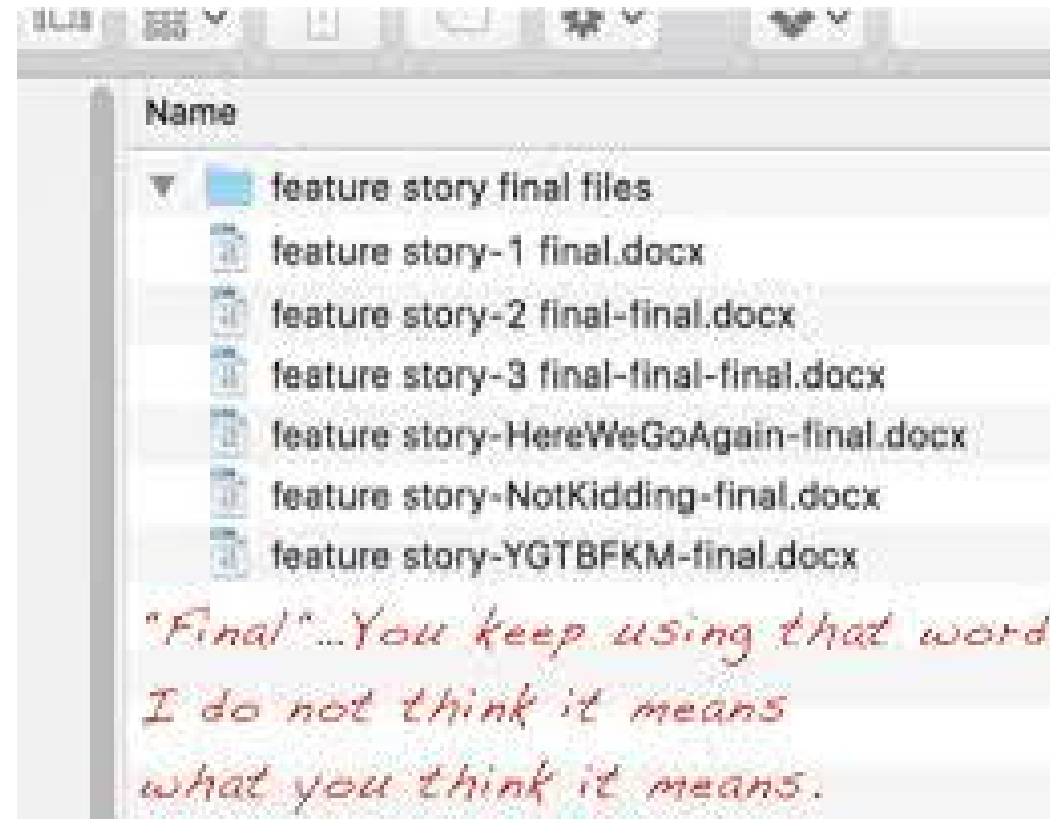
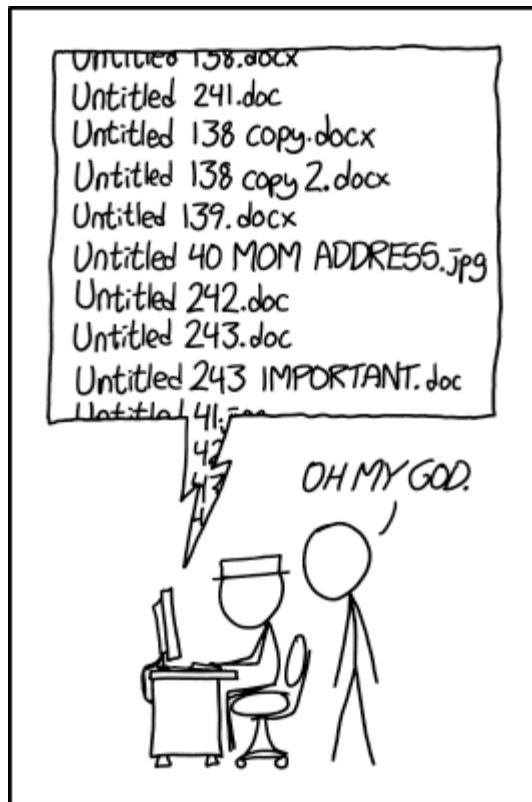
**“I’m afraid it’s too late to clean up my desk
without disturbing the delicate ecosystem.”**

File Naming.....

The Only Naming Convention That Works



File Naming.....



The best file name is one that explains what's in the file, without you having to open it.

How to Make Great File Names

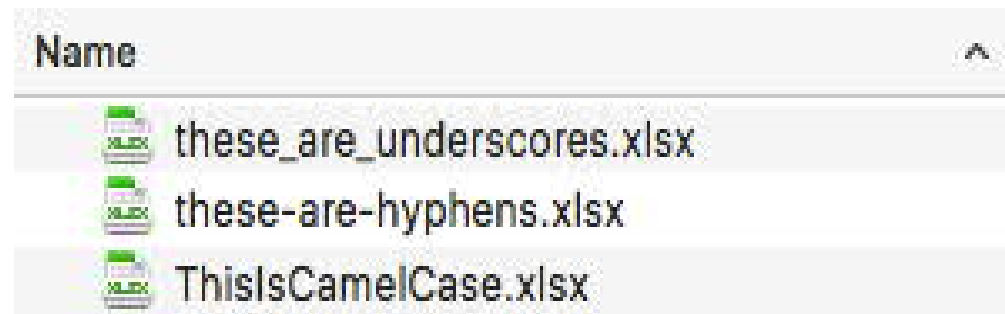
Make sure Each file name is

- Unique: It's impossible to tell what's in a file if you have many with the same name.
- Indicative of what the file contains: Is your file an annual report? Research? A to-do list? Put that information in the file name. Consider what recipients' first reactions will be if you email a file to them; best to keep all the identifying information right in the file name, so anyone receiving the file is clear about what's in it.
- In line with your business structure: This goes right along with your folder structure. Does your firm think of tasks based on which client they're for or what month something is due?

How to Make Great File Names

Make sure Each file name is

- Scannable: Make sure anyone who quickly glances at the file will understand its name. Don't use any abbreviations that aren't common knowledge or long streams of letters and numbers without any delineation between them. Including spaces doesn't always work, but you can use underscores, hyphens, or camel case to make your file names easier on the eyes.



Tips for good file names

- Find balance: Only you can decide what's too much or too little in a name.
- Document your system: Create a cheat sheet of any abbreviations you'll often use or any rules you may forget.
- Start general then get specific: Since your filenames will naturally be sorted from whatever you type first, start with the most general components (year, department, client, etc.) then move onto the specifics (AY, Client Name, Tax etc.). A general rule of thumb is whatever you want to see first, write first.

Rule #1: Avoid using special characters in a file name:

\\/:*?"<>|[]&\$, .

Rule #2: Use underscores instead of periods or spaces.









Rule #3: Err on the side of brevity.

Rule #4: The file name should include all necessary descriptive information independent of where it is stored.









Rule #5: Include dates and format them consistently.

Rule #6: To more easily manage drafts and revisions, include a version number on these documents.

Rule #7: Most importantly, be consistent.

Name	Page Range
 1.pdf	All Pages
 10.pdf	All Pages
 100.pdf	All Pages
 11.pdf	All Pages
 12.pdf	All Pages
 2.pdf	All Pages
 20.pdf	All Pages
 3.pdf	All Pages

TO -->

Name	Page Range
 001.pdf	All Pages
 002.pdf	All Pages
 003.pdf	All Pages
 010.pdf	All Pages
 011.pdf	All Pages
 012.pdf	All Pages
 020.pdf	All Pages
 100.pdf	All Pages

We want this....

AB_interview01_2010-01-12.txt

AB_interview02_2010-01-12.txt

AB_interview03_2010-02-03.txt

AB_interview04_2011-01-24.txt

AB_interview05_2012-01-15.txt

AB_interview06_2012-01-24.txt

YZ_interview01_2010-01-12.txt

YZ_interview02_2010-01-15.txt

YZ_interview03_2011-02-12.txt

YZ_interview04_2012-01-12.txt

Not this....

AB_interview1_Jan-1-2010.txt

AB_interview2_Jan-1-2010.txt

AB_interview_Feb-3-2010.txt

AB_interview_Jan-1-2011.txt

AB_interview_Jan15-2012.txt

AB_interview_Jan-24-2012.txt

Yan_interview1_Jan-12-2010.txt

Yan_interview_Jan-15-2010.txt

YZ_interview03_Feb-12-2011.txt

YZ_interview03_Jan-12-2012.txt

Because it sorts like...

AB_interview_Feb-3-2010.txt

AB_interview_Jan-1-2011.txt

AB_interview_Jan-24-2012.txt

AB_interview_Jan15-2012.txt

AB_interview1_Jan-1-2010.txt

AB_interview2_Jan-1-2010.txt

Yan_interview_Jan-15-2010.txt

YZ_interview03_Jan-12-2012.txt

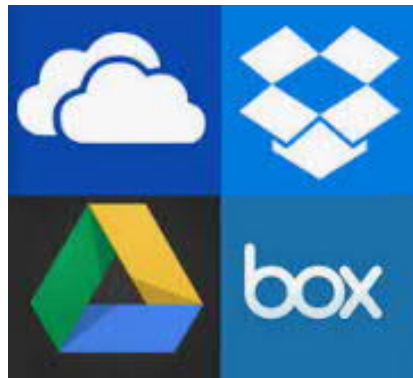
YZ_interview03_Feb-12-2011.txt

Yan_interview1_Jan-12-2010.txt

How to Quickly Find Files



- Finding files is much easier with a folder structure. Plus, with well-named files and folders, your computer's search will be an even better tool for finding files. Your new names and folders should be easy to find in seconds.



- You can also search for files inside apps themselves. Dropbox, Google Drive, and Box let you search through synced files and folders, while Zapier can search inside many of your productivity apps

Organization is the Key



File as you go : The best time to file a document is when you first create it.



Order your files for your convenience : If there are folders or files that you use a lot, force them to the top of the file list by renaming them with a ! or an AA at the beginning of the file name.

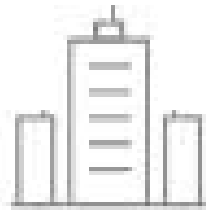


Cull your files regularly : keep your folders uncluttered by clearing out the old files

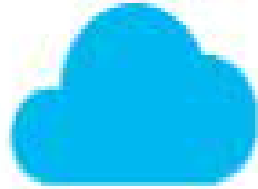
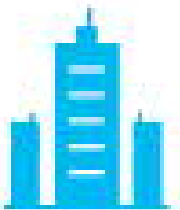
Document Management Systems - Types



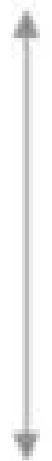
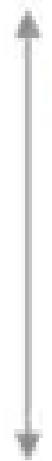
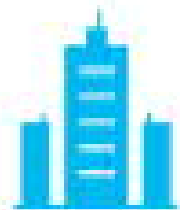
CLOUD



ON-PREMISES



HYBRID



Free Tier Storage

Monthly Price (Lowest-Storage Plan)

 Google One

15 GB

\$1.67 (100 GB)

 Dropbox

2 GB

\$9.99 (2 TB)

 iCloud Drive

5 GB

\$0.99 (50 GB)

 OneDrive

5 GB

\$1.99 (100 GB)

 sync.com

5 GB

\$4.08 (500 GB)

Document Management Systems – Key Factors to Consider

- Security – Access Controls and Permissions
- Scanning – Automated naming and filing, OCR
- Search - Allows full-text keyword searches within files (not just by title)
- Access, Edit , Monitor (Processes) **
- Collaboration – Internal/External Collaboration, Workflows, Co-authoring, Task Management, Alerts, Messaging.. Etc
- User Friendliness
- Mobility
- Integration
- Support
- Pricing

Top 3 DMS Softwares for SME's - 2019 (Inc.com)



Overall Winner plus Customer Service, Best Document Management Software/Systems for Small Business: eFileCabinet



Best Free Document Management Software/Systems for Small Business: Zoho Docs



Best Document Management Software/Systems for Collaboration: SharePoint

Other Document Management Systems

- Dokmee describes its offering as a secure, easy-to-use document management system designed for a variety of purposes including document capture and storage, search and retrieval, and file sharing.
- A site document management suite is used by architecture, engineering and construction companies for workflows, information management and compliance with global standards.
- DocuWare Cloud digitizes paper processes, enables configuration of custom workflows, and integrates with ERP, CRM and other systems.
- Adobe Document Cloud includes Acrobat DC for PDF productivity and Adobe Sign for integrated e-signing.

Indian Document Management Systems

- **KRYSTAL Document Management System**, a completely web browser based Document Management Software Solution, is provided by Primeleaf Consulting Private Limited, an Indian Company based out of Mumbai, India. .
- docManager
- DMS
- LuitBiz DMS – made with keeping various Indian Laws in consideration
- Eisen Vault – Indian Co-founders who have worked at LexisNexis and company has presence in Delhi, Mumbai, Bengaluru, Nepal, Singapore & Thailand



Time Sheet

CA Ashwin Dedhia

What do we get paid for ?

TIME

Raw Material for CA's Practice is time.

Is it important to Track it

Every CA wants to know the same thing

That their employees are all working effectively and productively each day for the benefit of their business.

But

Employees hate to fill out timesheets

Ways to Get Employees to Fill in Timesheets

- Explain WIIFM (What's In It For Me?)
- Keep It Simple
- Start from the top
- Make Submissions Easy
- Be Flexible about How the Time is Tracked
- Limit the Number of Time Tracking Items
- Automate Time Tracking
- Don't Penalize People for Being Honest
- Avoid the Reward / Penalty System
- Accountability can bring some 'protection' for employees that feel their time is not valued.

How Often Should one complete a Timesheet?

- There is no hard and fast rule about this but it's generally better to complete them as soon as you can so you remember what you spent your time on.
- If you don't have that many tasks you can complete them once a week.

Some features to identify best timesheet systems for small and medium practitioners

- easy to use for your staff – and save them time
- Feature an approval process.
- Record and calculate breaks.
- Give an added layer such as time spent on projects, not just total time worked
- Allow access for remote workers. From multiple types of devices such as smartphones.
- A location specific identifier can be an option too. E.g., IP-address-specific login or GPS location
- Can be assigned to both full-time employees or contractors.
- You should not be able to print timesheets for [Data Protection purposes](#).
- Free you from the inaccuracies, security hazards and hassle of managing spreadsheets or physical documents.
- Assist in optimising time management and efficiency.
- Allow secure login and access control.

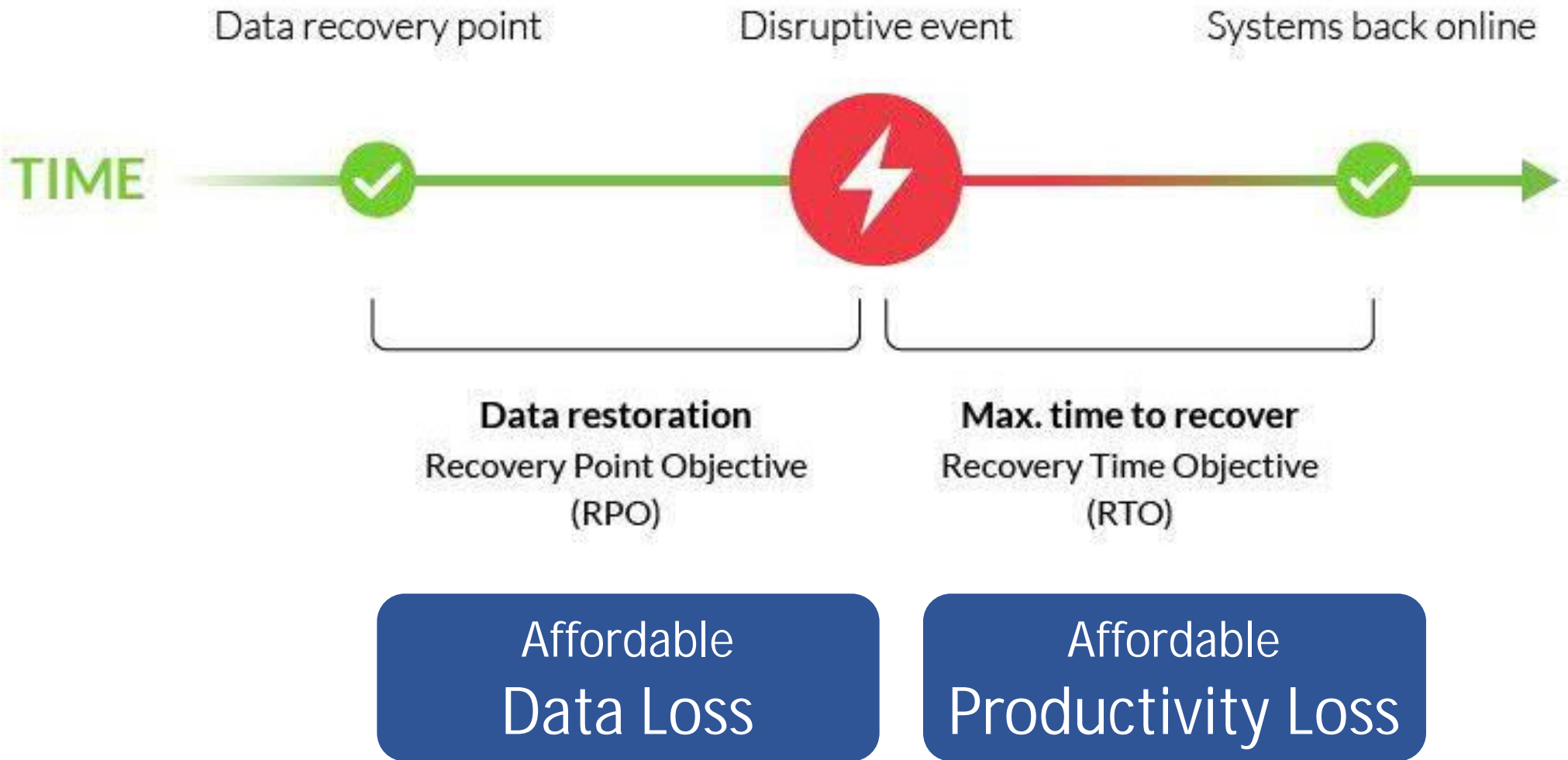
Some good Calendar / Timesheet solutions

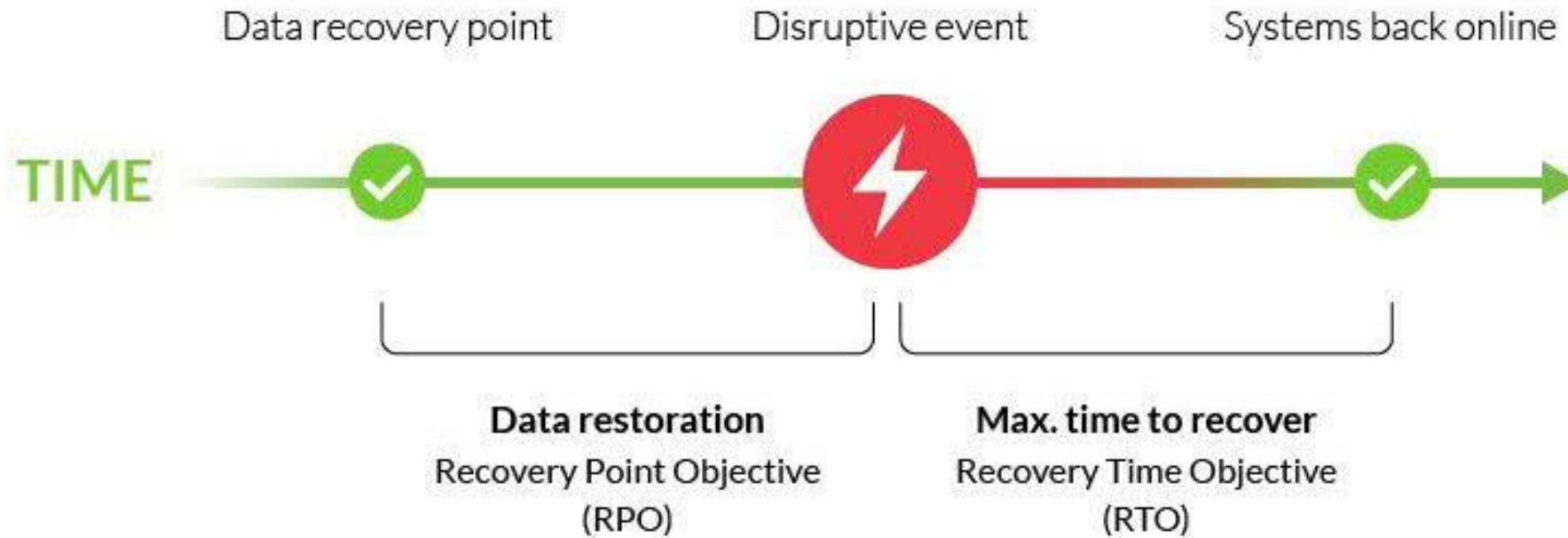
- www.google.com
- www.outlook.com
- www.clockify.me
- www.timecamp.com
- www.Madreacha.com/jamku



Backup Solution

CA Adarsh Madrecha





	Data restoration Recovery Point Objective (RPO)	Max. time to recover Recovery Time Objective (RTO)
File Deleted	4 Hours	2 mins
Full System Crash	5 Hours	1 Day
Malware Attack	1 Day	1 Day

Best Practical Solution



<https://www.acronis.com/en-in/personal/computer-backup/>

Standard

One-time purchase

₹ 1,700

Full image backup

Active disk cloning

Quick recovery / Universal restore

New! Ransomware and cryptomining blocker

 Upgrade discounts for new versions

 Online support

 For 1 computer



Advanced

One-year subscription

₹ 1,700

per year

Full image backup

Active disk cloning


Quick recovery / Universal restore


New! Ransomware and cryptomining blocker

New! Office 365 backup

Cloud backup and features

End-to-end encryption

 Free upgrades to the latest version

 Phone and online support

 For 1 computer



 250 GB for free



Premium ✓

One-year subscription

₹ 3,400

per year

Full image backup

Active disk cloning

Quick recovery / Universal restore

New! Ransomware and cryptomining blocker


New! Office 365 backup

Cloud backup and features

End-to-end encryption

Blockchain certification of files

Electronic signatures on files

 Free upgrades to the latest version

 Phone and online support

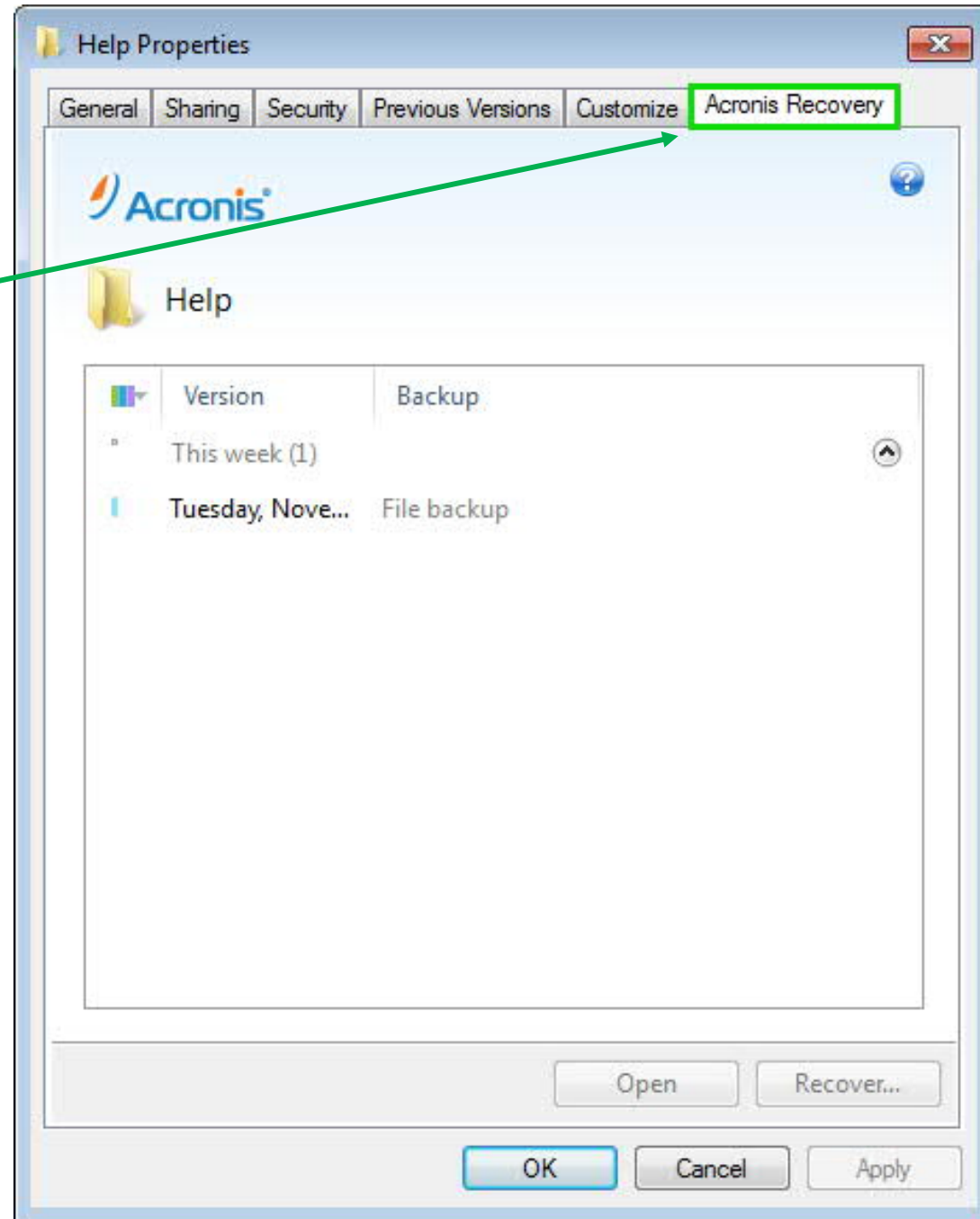
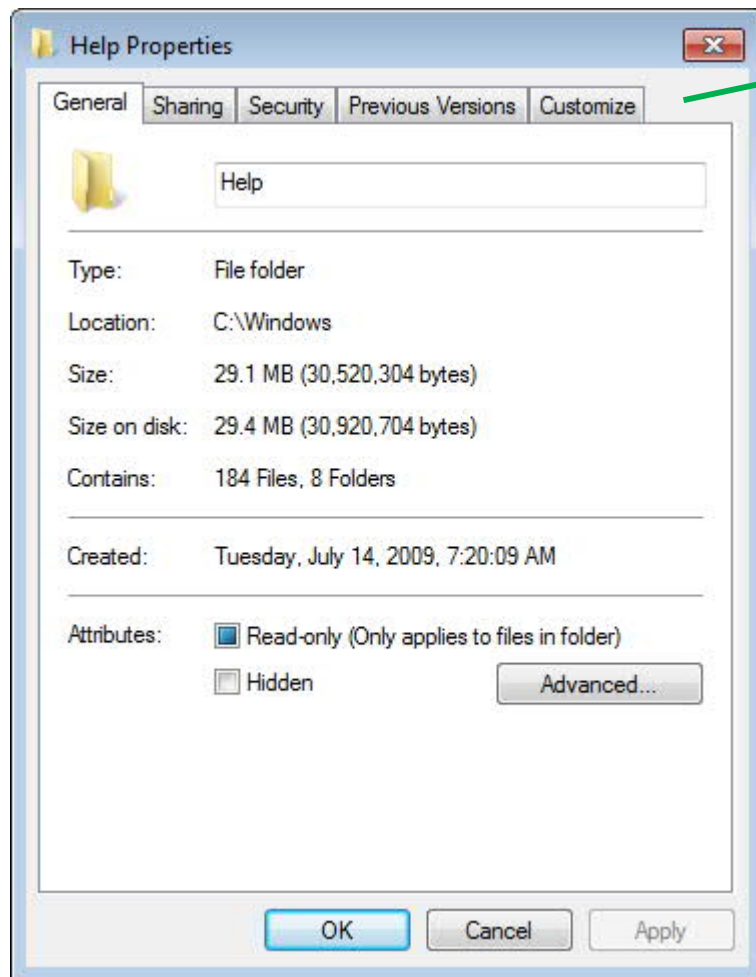
 For 1 computer



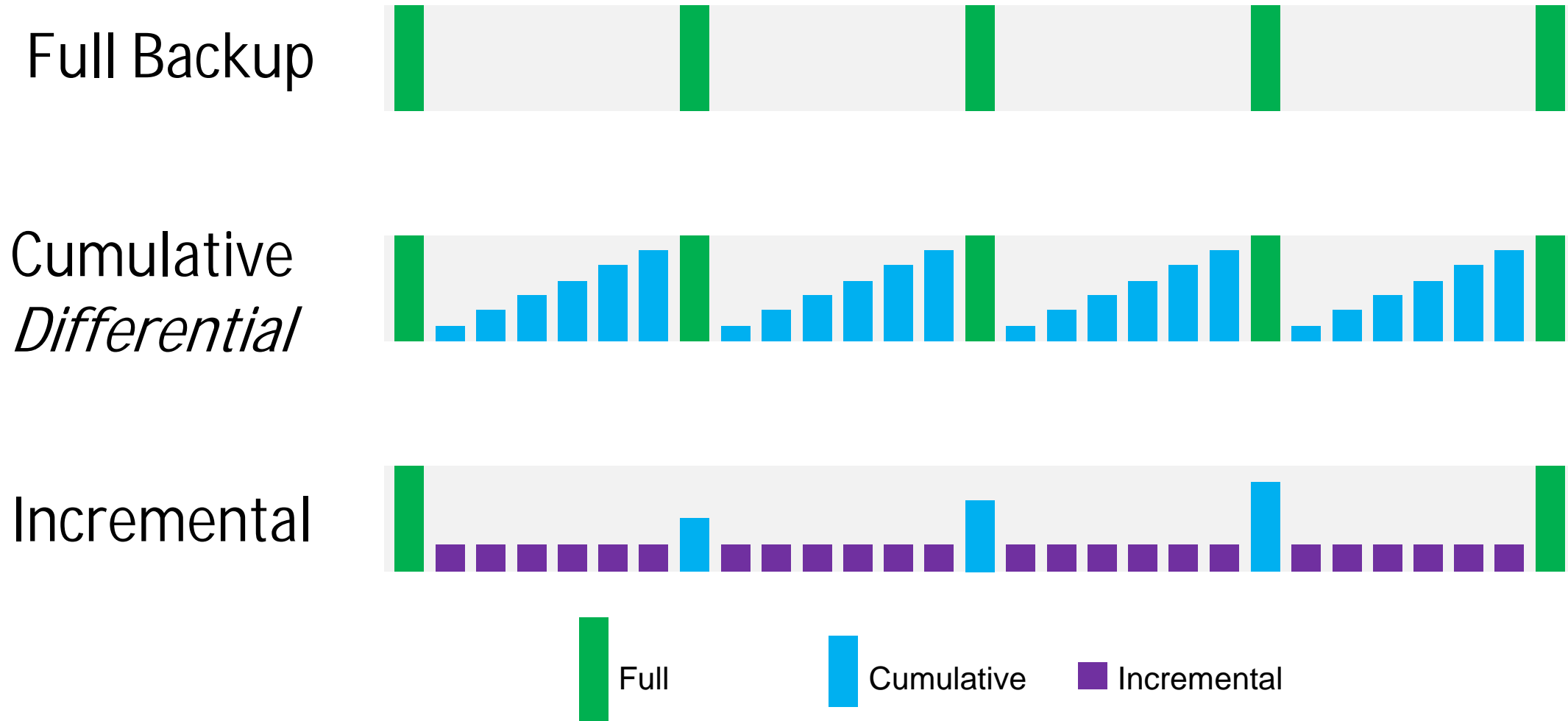
 1 TB for free



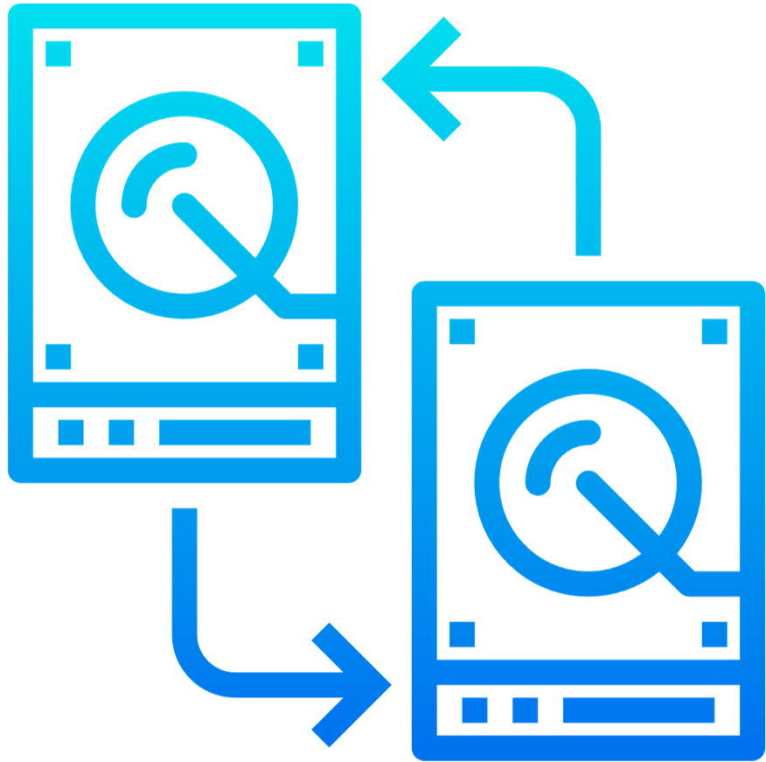
Speedy Recovery



Backup techniques



Best Configuration



Local Hard Disk

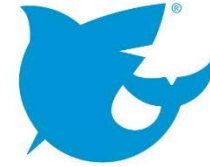


Cloud




Any Automated Tool


Acronis



Any NAS/Server

FreeNAS™

Price	Software + Existing Hardware	New Hardware
Raid HDD	✗	✓
Access Management 	✗	✓
Ease of Setup	✓	✗
Ease of Use	✓	✓
Versions	30 Online/Unlimited Offline	Unlimited
Malware	Backup Restore	Auto Protection
Restore	On server	Any PC



Cyber Security

CA Pranay Kochar

IMPORTANCE OF CYBER SECURITY

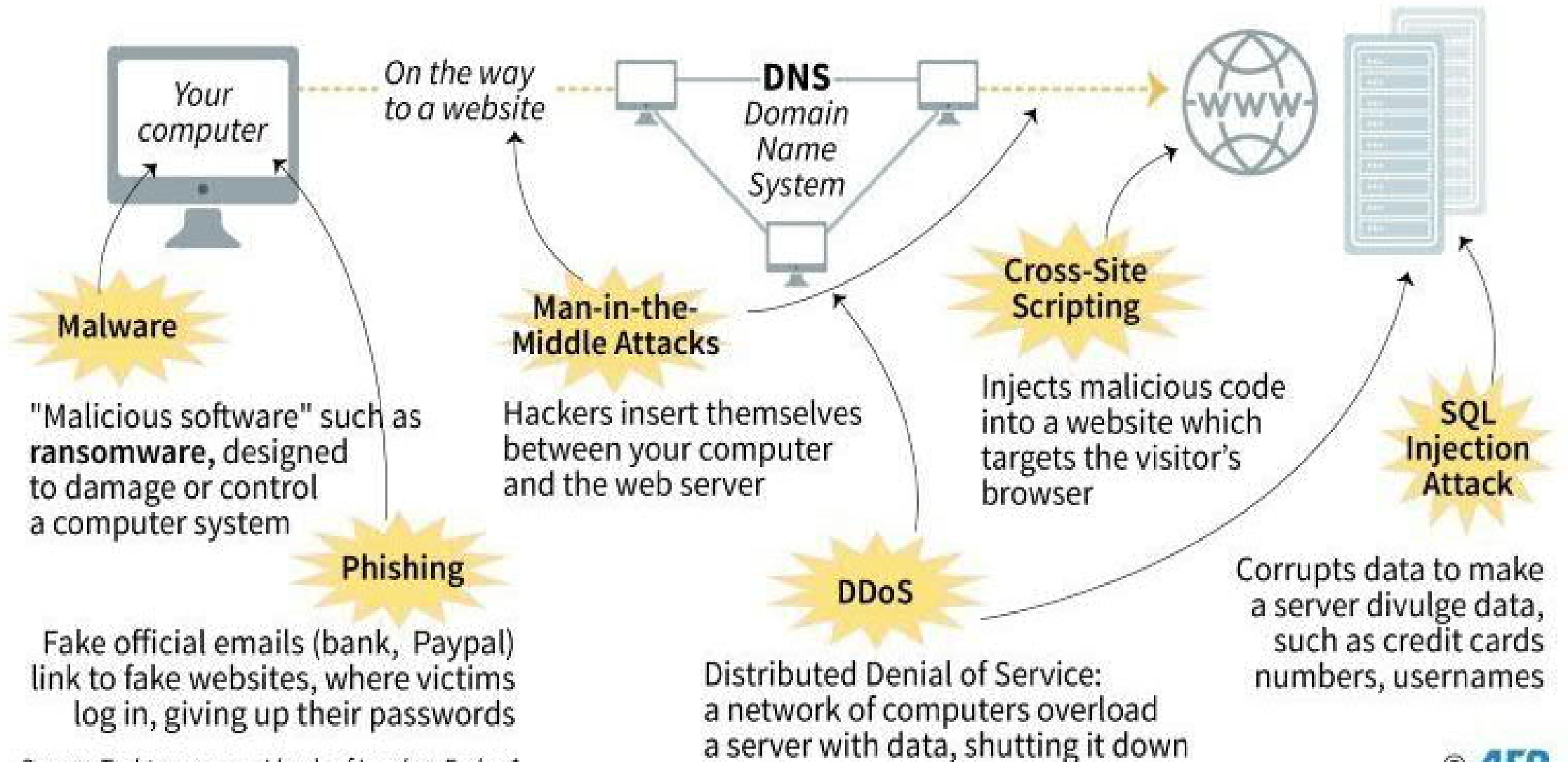
- Firms are trusted with some of the most intimate personal and financial information of their clients
- Hackers are continually trying to get their hands on such critical, private information
- Understanding cyber security basics ensures not only the safety of client information, but also the longevity of the firm

Can your firm get hacked in the same way that any larger financial institutions may have been?

The short answer is YES!

TYPES OF CYBER ATTACKS

Cyber crime worldwide cost \$400 billion in 2015 and is forecast to reach \$2 trillion in 2019*



Source: Techterms.com, Lloyds of London, Forbes*

Why CA firms are at high risk for Cyber Attacks



FIRMS HOLD MASSIVE PRIVATE DATA

- Firms hold top to bottom information as privileged data from HNI clients or organizations.
- Tax documents, financial records, PAN, and direct-store data, accountants may also serve as sources for years of private data.
- Some firms hold virtually complete individual accounts of their customers, transforming these practices into important targets.

What is personal data?



The infographic features a central illustration of a man in a light blue suit holding a black folder. To his left is a vertical list of data categories, each with an orange icon and a label. The categories are: Name (ID card icon), Address (house icon), Localisation (location pin icon), Online identifier (person icon), Health information (heart with ECG icon), Income (Euro symbol icon), Cultural profile (hands icon), and and more (three dots icon). The background is dark blue with a subtle grid pattern.

Name
Address
Localisation
Online identifier
Health information
Income
Cultural profile
and more

You

SMALL FIRMS TEND TO HAVE INSUFFICIENT SECURITY

- Cyber Criminals particularly target small accounting firms since they have implemented much lesser security systems.
- When they get access to an organization's system, cybercriminals can regularly steal virtually any type of documents, from financial records to emails.

Action Plan to Protect Your Firm from Cyber Attacks



KNOW THE APPLICABLE LAWS

- Every firm is expected to protect it's clients' Personally Identifiable Information (PII) or details.
 - PAN
 - Aadhaar Number / Data
 - Digital Signatures
 - Bank Account Number
 - Residential Address
 - Residential or Mobile Phone Number
 - Date of Birth
 - Place of Birth
 - Mother's Maiden Name
 - Financial Records

India IT Act of 2000
(Information Technology Act)



SECTIONS OF IT ACT RELATED TO DATA PROTECTION

The Information Technology Act, 2000 have two sections relating to Privacy:

- **Section 43A**, which deals with implementation of reasonable security practices for sensitive personal data or information and provides for the compensation of the person affected by wrongful loss or wrongful gain.
- **Section 72A**, which provides for imprisonment for a period up to 3 years and/or a fine up to Rs. 5,00,000 for a person who causes wrongful loss or wrongful gain by disclosing personal information of another person while providing services under the terms of lawful contract.

IT RULES RELATED TO DATA PROTECTION

Information Technology (Reasonable security practices and procedures and sensitive personal data or information) Rules, 2011

- Applies to bodies corporate and persons located in India
- Duty to draft a privacy policy and make it easily accessible to the provider of the information.
- The policy should be clearly published on the website and should contain details on the type of information that is being collected, the purpose for which it has been collected and the reasonable security practices that have been undertaken to maintain the confidentiality
- Obtain consent in writing or by Fax or by e-mail before collecting such sensitive personal data.

IT RULES RELATED TO DATA PROTECTION

Information Technology (Reasonable security practices and procedures and sensitive personal data or information) Rules, 2011

- The information collected shall be used only for the purpose for which it is collected
- Retain the information for no longer than is required for the purposes
- Seek prior permission of the information provider before disclosing such information to a third party
- Maintain the security of the information provided

LAW IN PIPELINE SINCE 2011

- **The Privacy Protection Bill**, proposed legislation for a privacy and personal data protection regime in India.
- This law when passed would regulate the collection and use of personal data in India, as well as surveillance and interception of communications.

PERSONAL DATA PROTECTION BILL, 2018-A PEEK

- Restricts and imposes conditions on cross-border transfer of personal data
- Suggests setting up of Data Protection Authority of India to prevent any misuse of personal information
- Allows processing of personal data only for the purpose it is collected or for compliance of any law, employment and for any function of Parliament or any state legislature



- 'Sensitive personal data' comprises passwords, financial data, health data, sex life, sexual orientation, biometric data, genetic data, caste or tribe and religious or political belief or affiliation

It is a monumental law and we would like to have widest parliamentary consultation... We want Indian data protection law to become a model globally, blending security, privacy, safety and innovation

RAVI SHANKAR PRASAD | IT MINISTER

PERFORM REGULAR RISK ASSESSMENTS

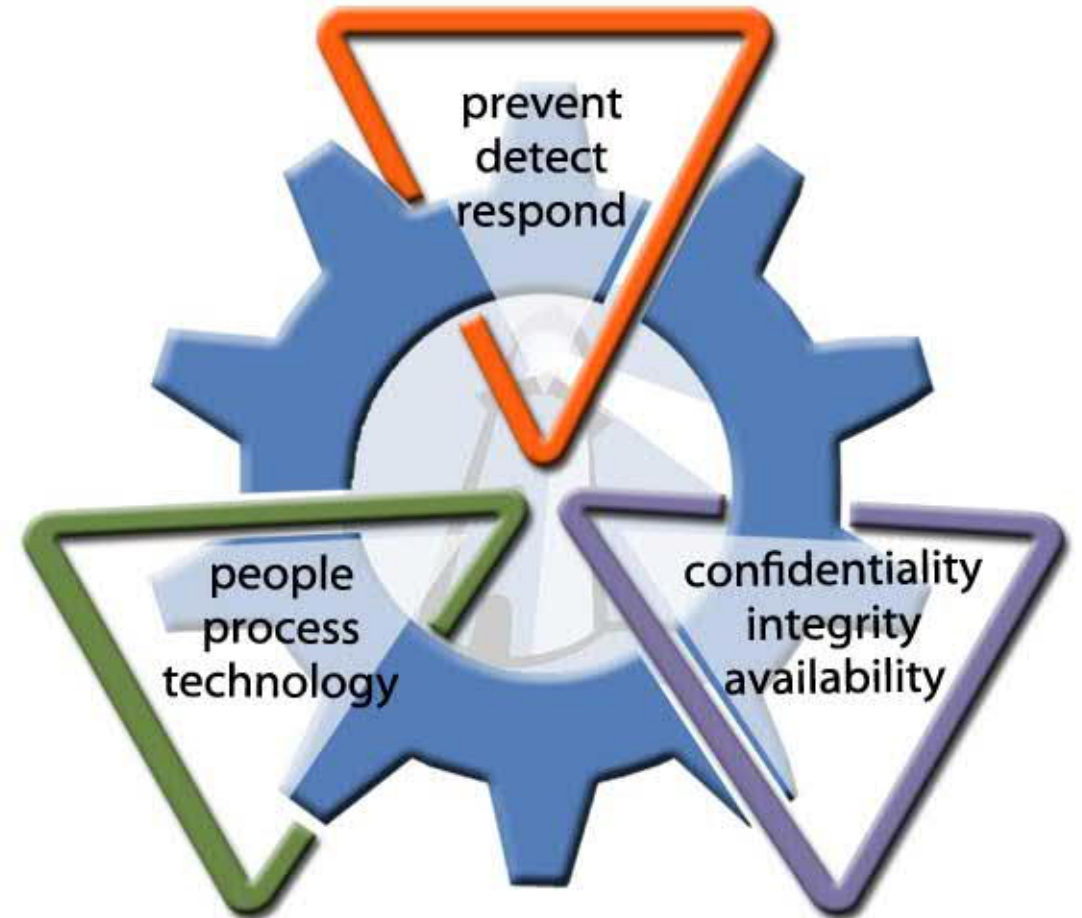
- A review of the client information, categorizing which are regulated PII and sensitive data
- Identification of new laws that your firm need to fulfill for compliance
- Partner with a Managed Services Provider to make sure your risk is limited and make sure your systems are protected and secure.
- New developments in the regulatory and business environment
- New technologies that your firm could be maximizing



		Potential Severity Rating			
		Minor	Moderate	Significant	Catastrophic
Likelihood severity occurs	Very Likely	Moderate	High	Extreme	Extreme
	Likely	Low	Moderate	High	Extreme
	Unlikely	Very Low	Low	Moderate	High
	Rare	Very Low	Very Low	Low	Moderate

CREATE A CYBER SECURITY POLICY

- It's easier for your employees to follow cyber security protocols if it's a:
 - Formal Policy Document,
 - Part of your employee handbook, or
 - Clearly outlined in your standard operating procedures.
- A written cyber security policy can also help in training employees.



Cyber Security Triads

UPDATE THE OPERATING SYSTEM



- Buy Genuine Operating Systems
- The operating system requires frequent or continuous updates for strengthened security
- System updates are especially significant for server operating systems.
- Regular updates of OS, upgraded firewalls and anti-virus in your workstations can provide for more trusted protection against threats.
- Harden your operating systems as per manufacturers guidelines.



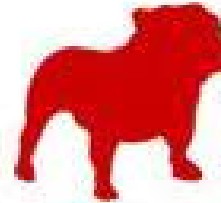
EMAIL SECURITY

- More than 90% of cyber-attacks begin with a phishing email.
- Majority of people open an email from an unknown individual's name, without browsing or verifying the actual sender's email address.
- Encryption of Email is the key.
- Default Gmail encryption protects emails. Google encrypts emails both when they're stored (data at rest) and while in motion.
- Gmail encryption does have its limits, but can be easily strengthened with an additional layer of client-side encryption, via third-party add-ons.



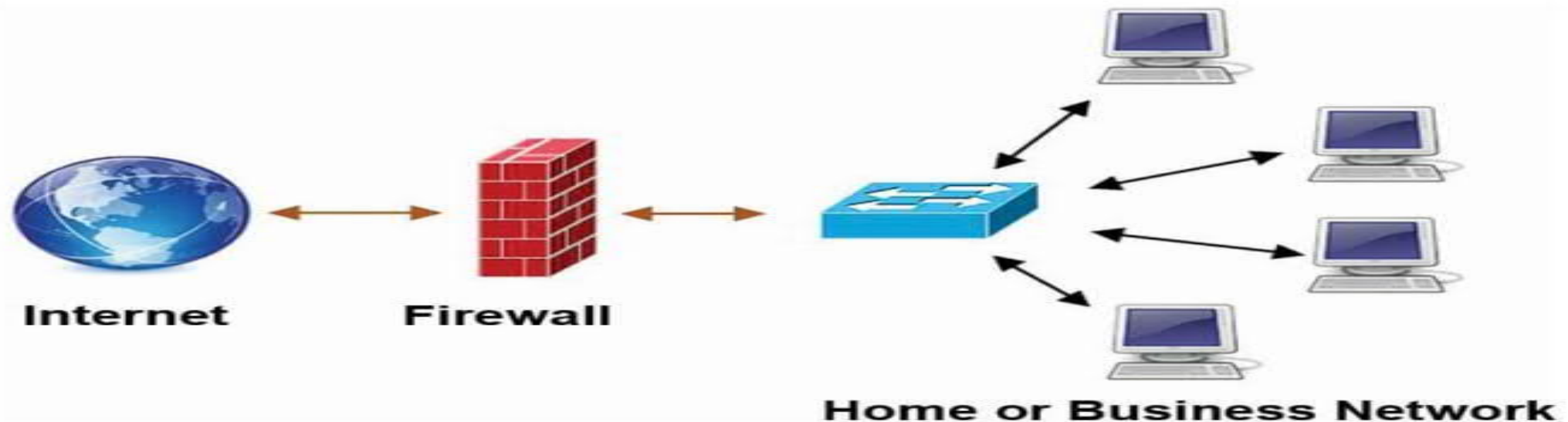
ANTIVIRUS UPDATES

- Use genuine anti virus software
- Antimalware applications should check for updates frequently,
- Scan the devices on a set schedule, along with any media that is inserted.
- In bigger firms, having a central antivirus server is recommended.



INTERNET SECURITY

- Internet searches can lead you to compromised websites, which infect your network with viruses and malware.
- Install a hardware firewall router with gateway antivirus, gateway anti-malware, and intrusion protection system.
- Use Proxy Servers / Content filtering to prevent employees accessing certain websites



WIRELESS SECURITY



- Secured remote / wireless access into your network system planned, tested, and then implemented.
- Deploy a strong password policy for accessing the Wireless Network.
- Have a guest network for visitors that need internet access via your wireless network system.

Wireless Network: **Enabled** Disabled

Network Name (SSID): HOME-D12F

Mode: 802.11 b/g/n ▼

Security Mode: WPA2-PSK (AES) ▼

Channel Selection: Open (risky)
WEP 64 (risky)
WEP 128 (risky)
WPA-PSK (TKIP)
WPA-PSK (AES)
WPA2-PSK (TKIP)
WPA2-PSK (AES)
WPAWPA2-PSK (TKIP/AES) (recommended)

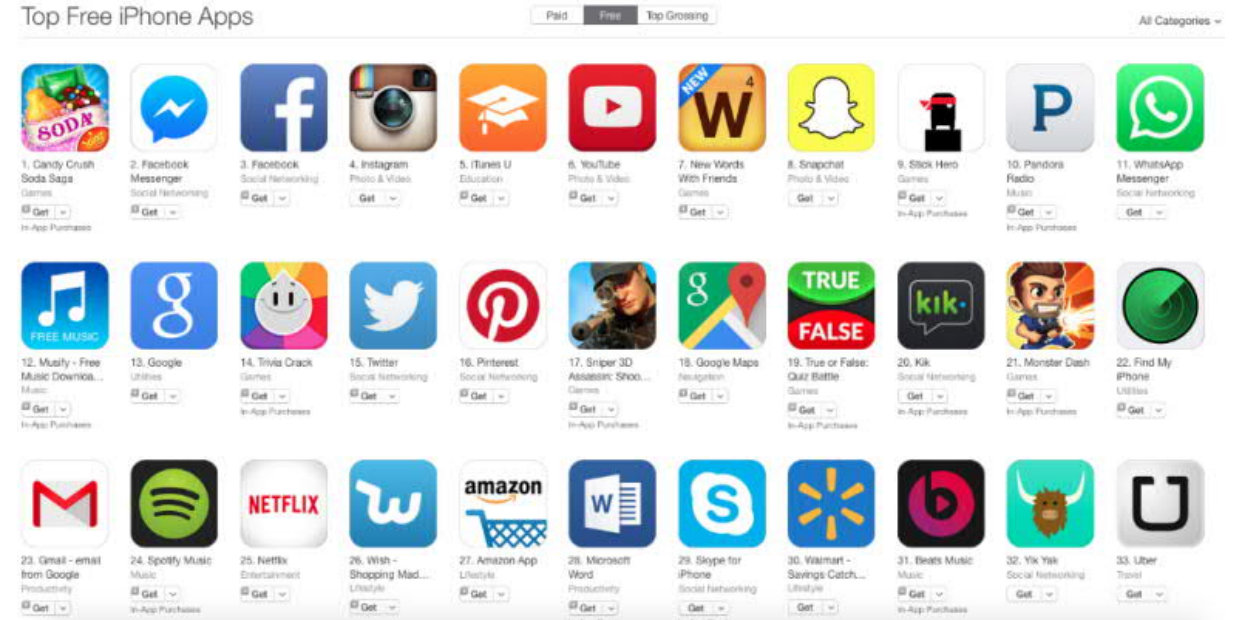
Channel: WPA-PSK (AES)
WPA2-PSK (TKIP)

Network Password: WPA2-PSK (AES)
WPAWPA2-PSK (TKIP/AES) (recommended)

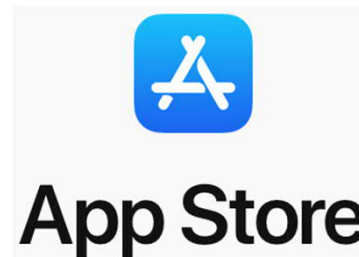
Show Network Password:

PROTECTION FOR MOBILE DEVICES

- Data used on mobile devices should be encrypted.
- Devices should be password protected
- Using only genuine and trusted mobile apps.
- Using the latest security apps on the phone.



Google Play Store



PROTECTION FOR USB DEVICES

- Any device that plugs into a USB port including Mobile Phones, iPods, and cameras can be used to spread malware.
- When an infected USB drive is plugged into a computer, the malware infects that computer.
- An organizations's biggest weakness is an employee who simply doesn't understand the potential security risks of using USB drives.



PROTECTION FOR USB DEVICES

Steps to protect the data on your USB drive and on any computer:

- Use passwords and encryption on your USB drive
- Keep personal and business USB drives separate
- Use a firewall, anti-virus software, and anti-spyware software to make your computer is less vulnerable to attacks
- Do not plug an unknown USB drive into your computer
- Disable Autorun
- Develop and enforce USB drive-related policies

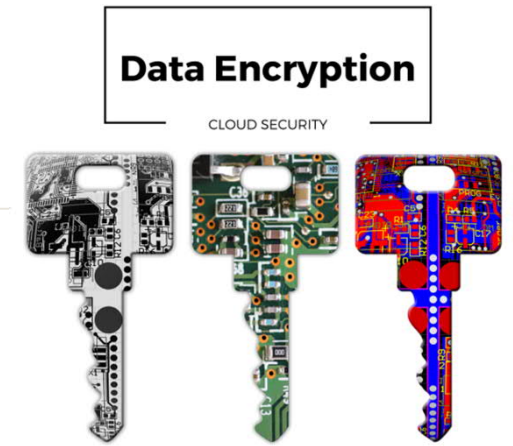
BACKING UP DATA RELIGIOUSLY

- If all your data is in one place, it is nowhere.
- Back up all of your most important data on a regular basis.
- Backup stored at an off-site server it drastically minimizes chances of a breach or data loss.
- Currently one of the best methods of security.



ENCRYPT BACKUP DATA

- As a professional, your responsibility is to ensure that data is secure when it's in your custody.
- Encrypt any backup media that leaves the workplace, and also validate that the backup is complete and usable.
- Frequently review backup logs for completion, and restore files randomly to ensure they will actually work when required.
- Hiring an IT specialist is advisable to set up your firm's network, and ensure your data is encrypted and secured.



MOVE YOUR DATA TO THE CLOUD

- Data stored on the cloud has greater protection than data that is stored on company servers.
- The move to such cloud services can change business habits that help ensure a much secure accounting firm.
- Cloud accounting can make your business more efficient.
- It's not that hard to migrate your practice to the cloud, and it will improve your efficiency, save money and make your clients feel safer



FIRST IN ACCOUNTING SEGMENT
ONLINE/OFFLINE | PLATFORM INDEPENDENT | OS INDEPENDENT

MEET NEW

GEN GST
Secured GST e-Invoicing & Billing Software India

BENEFITS OF NEWLY LAUNCHED
Gen GST Software
VERSION 2.0

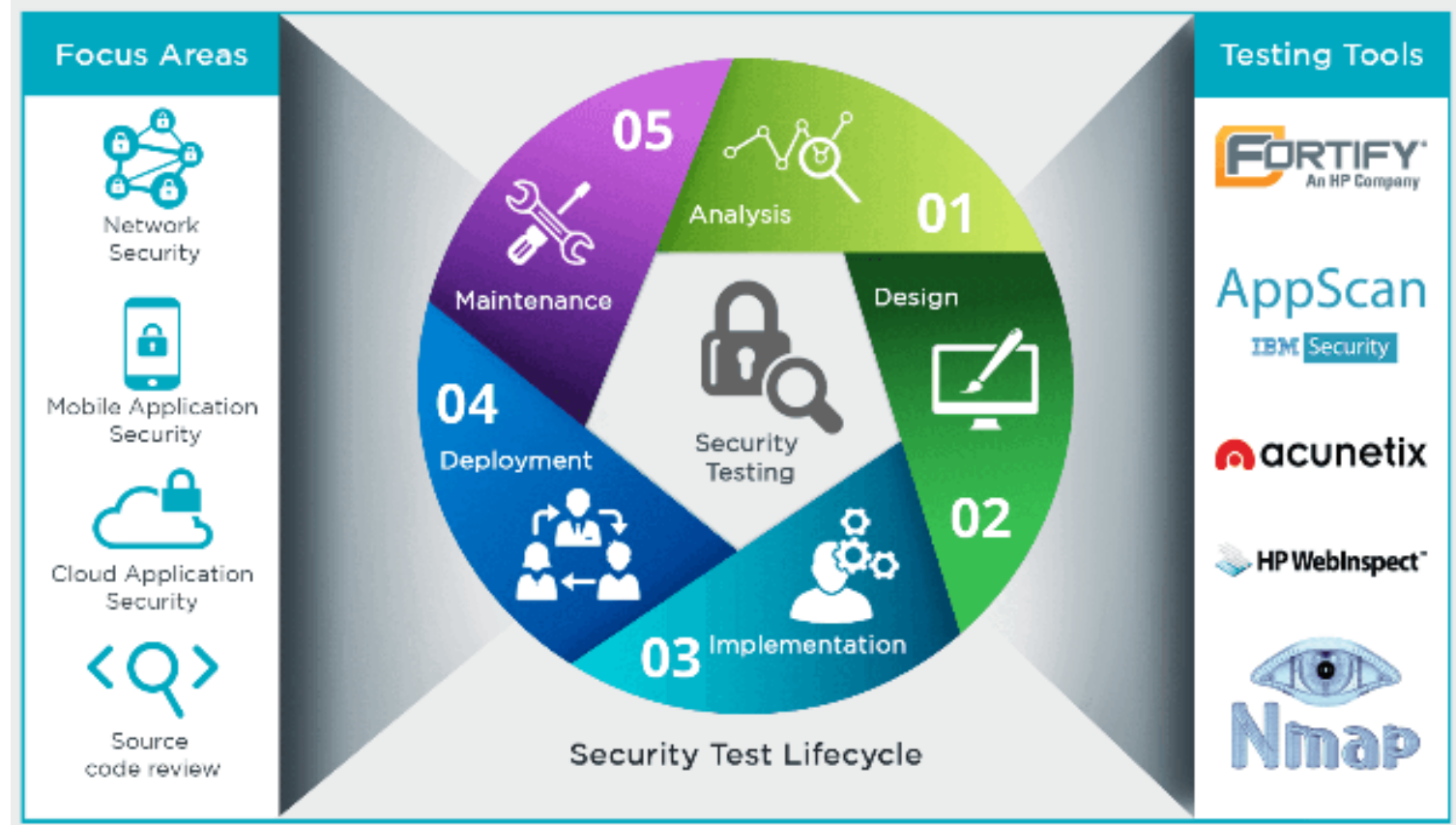
OFFLINE | CLOUD | WINDOWS | LINUX | MAC | MOBILE/TABLET | ANDROID | IOS

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TEST SECURITY MEASURES

- Hire Security specialists for proper configuration when implementing firewalls and security-related features such as remote access and wireless routers.
- External resources can be called upon to do Vulnerability Assessment / Penetration testing of your applications or networks.



EDUCATE EMPLOYEES



- Most breaches occurred because of un-aware employees.
- Security education is a must and should be conducted once a year.
- Employees should be regularly instructed on current cyber security attack techniques such as phishing and dangerous threats including ransomware, and social engineering
- Review IT / computer usage policies, and provide reminder training to employees for all the new and updated policies.



Phishing
Readiness



Behavioural
Change Program



Executive
Management Program



Cultural Change
Program



Security Awareness
Program



Communications
Material

IN CONCLUSION

- **Isn't technology a crucial factor in cyber security for accounting firms?**
- **Is technology at fault for all these modern-day data espionage?**
- It's not technology per se, but the poor implementation of the technology which is at fault.
- It would be best to partner with a managed services provider to take care of your cyber security and tech management needs.



Welcome to Ted Talk style Seminar



Please raise your hand and ask question
All ~~stupid~~ questions are welcomed

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