



DocSync Software for CAs

- Simpler & Easier than Excel
- Loaded with Practical Features
- Saves Time
- Increase Efficiency
- Budget Friendly

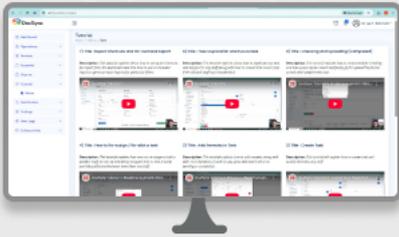
<https://docsync.in>

Powered by



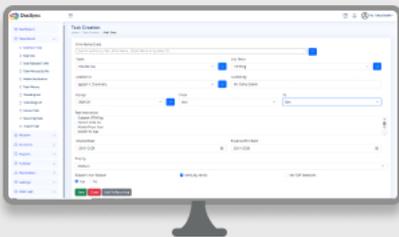
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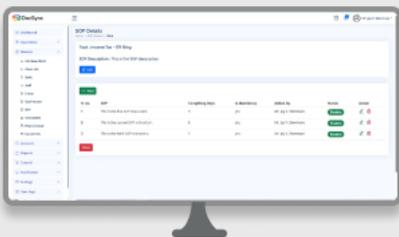
Video Tutorials

Learn faster with built-in video tutorials for all the major sections.



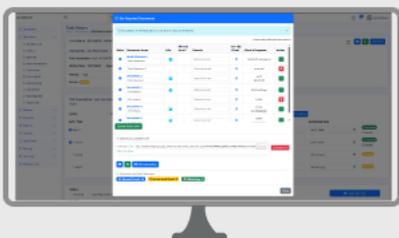
Fastest Way to Create Tasks

Create tasks in seconds, not minutes with task duplication features and recurring / automate task creation.



Define SOPs for Tasks

Standardize work with predefined SOPs and sub-tasks.



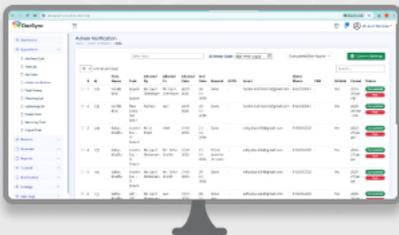
Document Fetcher

Automated Client Follow-ups.
Automated client's documents collection without manual follow-ups.



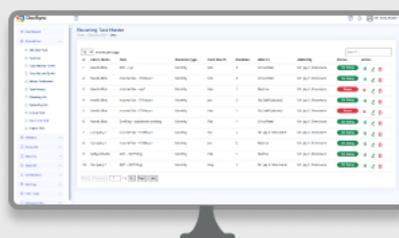
Checking and Uploading Module

Review documents, raise and resolve queries, and finalize them for submission on the relevant portals (GST, Income Tax, etc.).



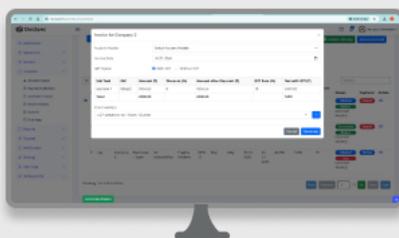
Admin Verification

Clear accountability with multi-stage task verification.



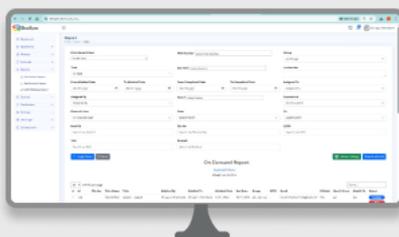
Recurring Task & Duplicate task

Automate repetitive work with recurring and duplicate tasks.



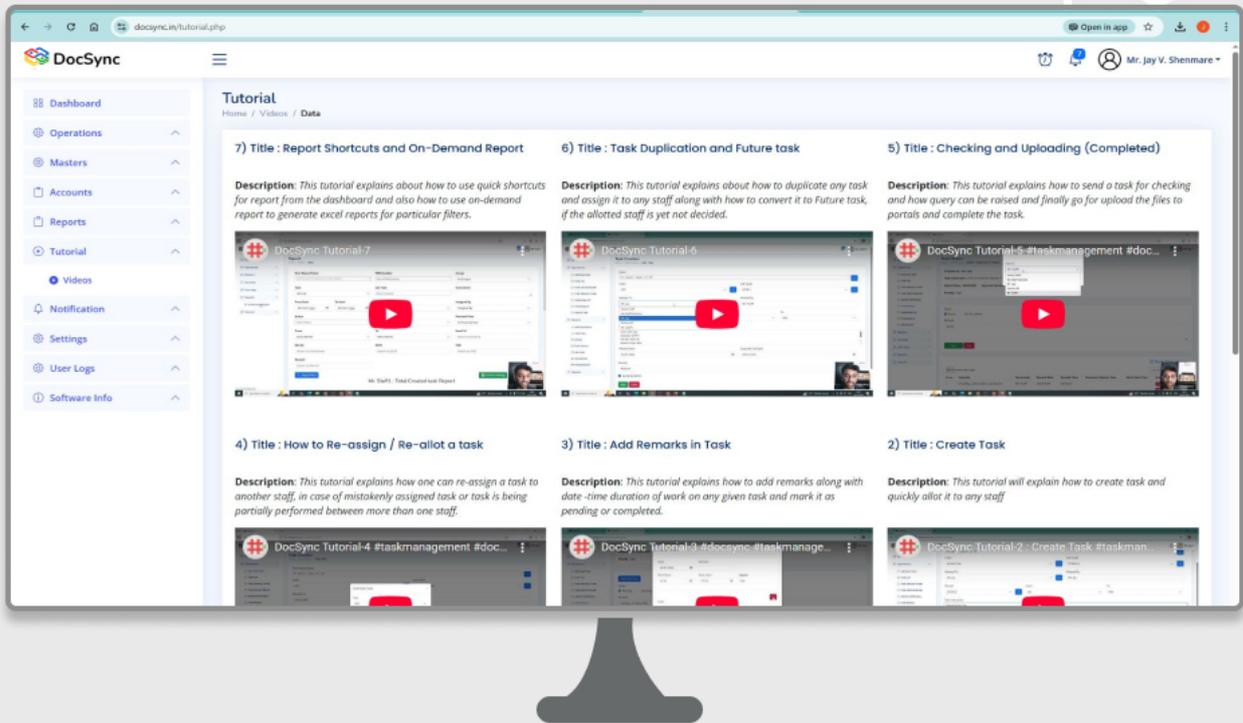
Multi-Firm Invoice Generation

Manage billing across multiple firms from a single platform.



Reports

On-Demand, Staff Activity, Staff Efficiency, Invoice Reports. Make informed decisions with powerful real-time reports.

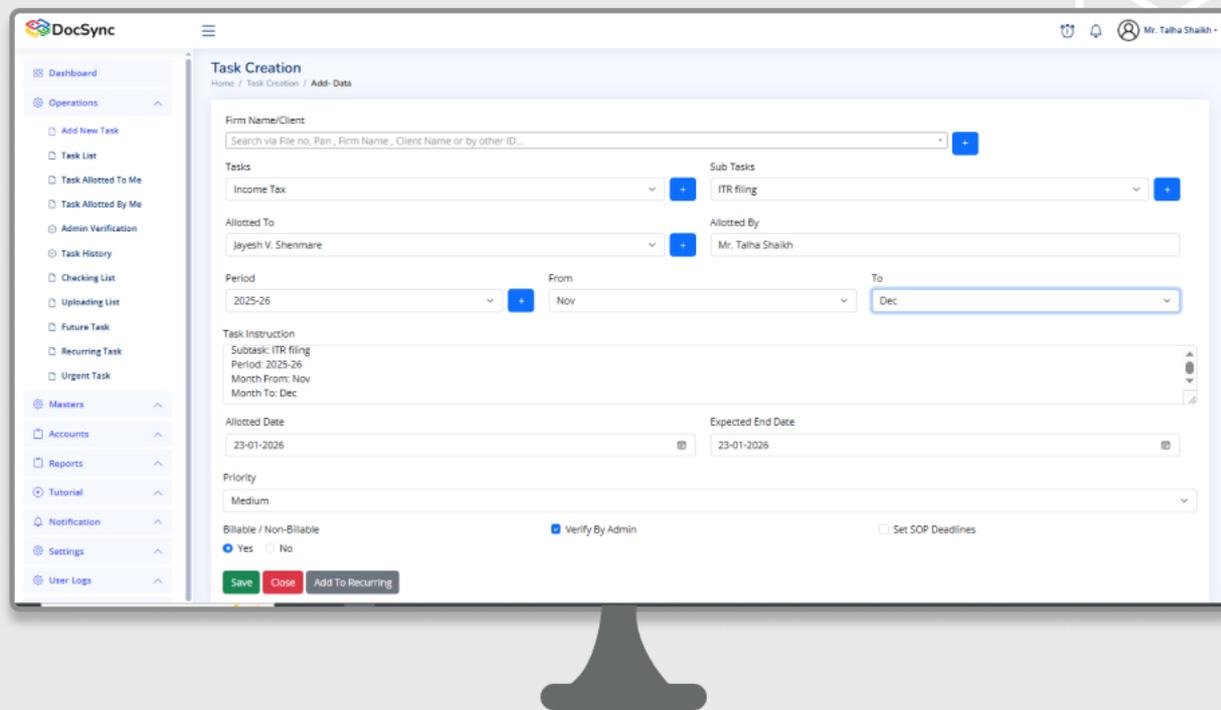


Video Tutorials

- Built-in video tutorials for quick learning
- Step-by-step guidance on workflows and features
- Faster onboarding for new staff and interns
- Reduces training time and dependency on seniors
- Ensures consistent usage across the firm

Video Tutorial



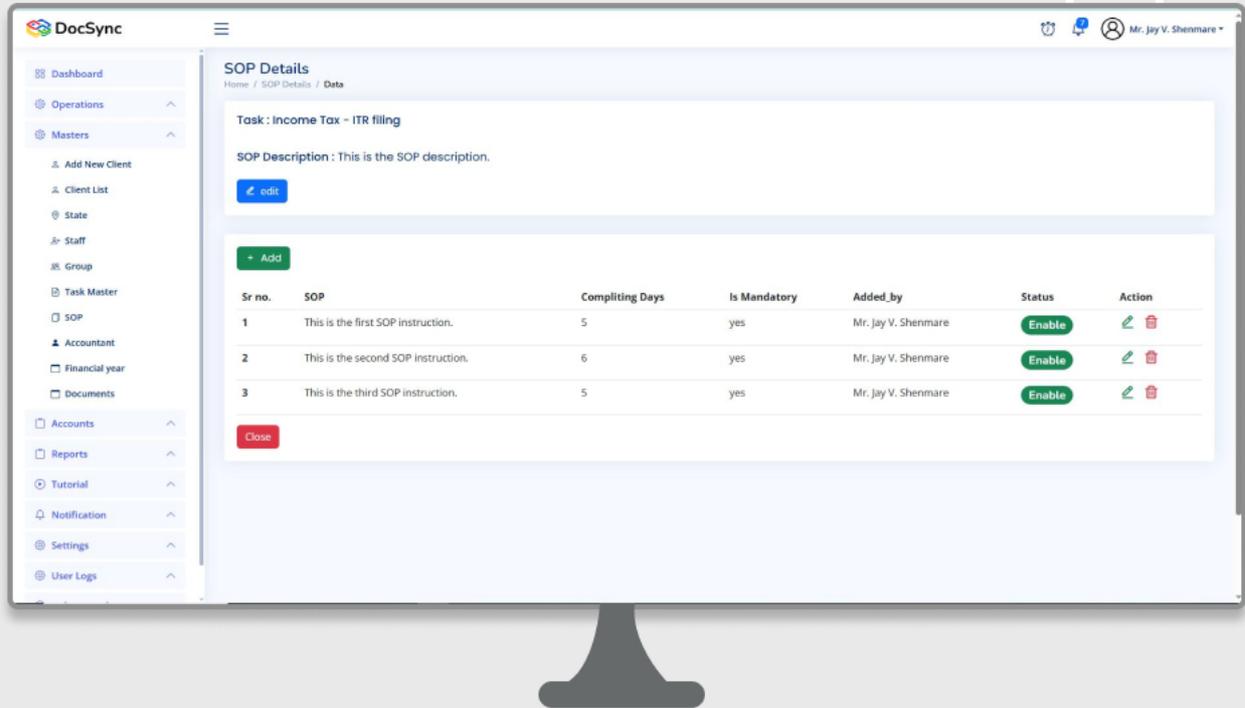


Task Creation

- Built specifically for CA firms to manage compliance and client work efficiently
- Create ITR, GST, ROC, Audit, and other tasks in just a few clicks
- Minimal mandatory fields reduce data entry and save staff time
- Reusable templates for routine and recurring filings
- Instant task assignment with clear responsibility and deadlines
- Smooth handling of peak-season workload without missed filings
- Reduces internal follow-ups and administrative overhead

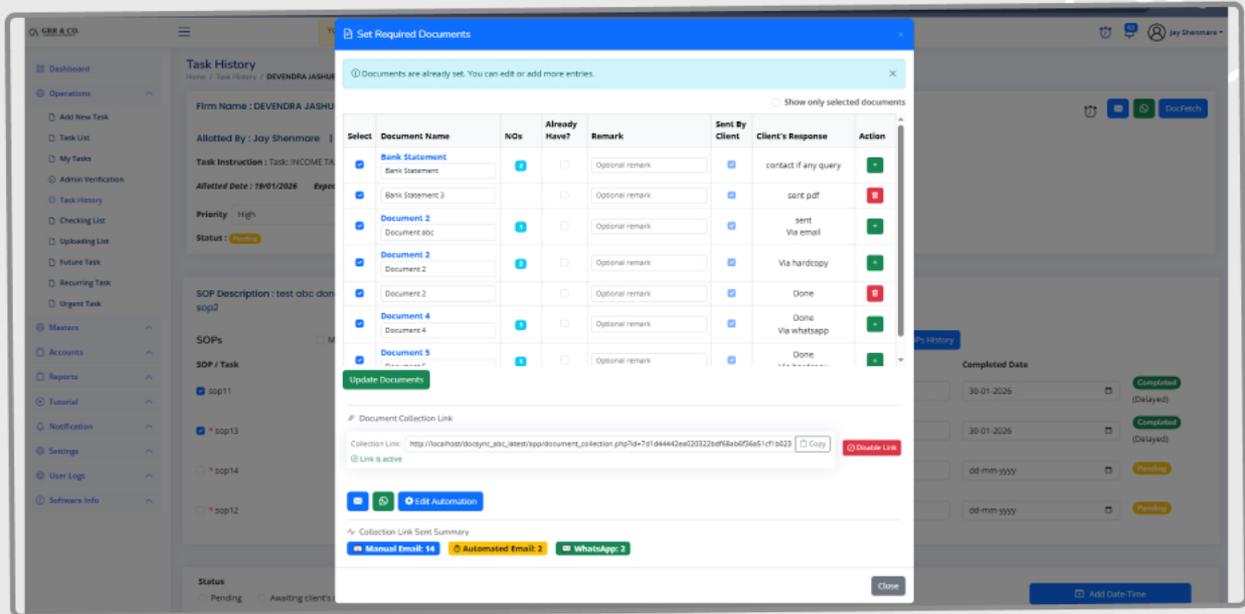
Video Tutorial





Define SOPs for Tasks

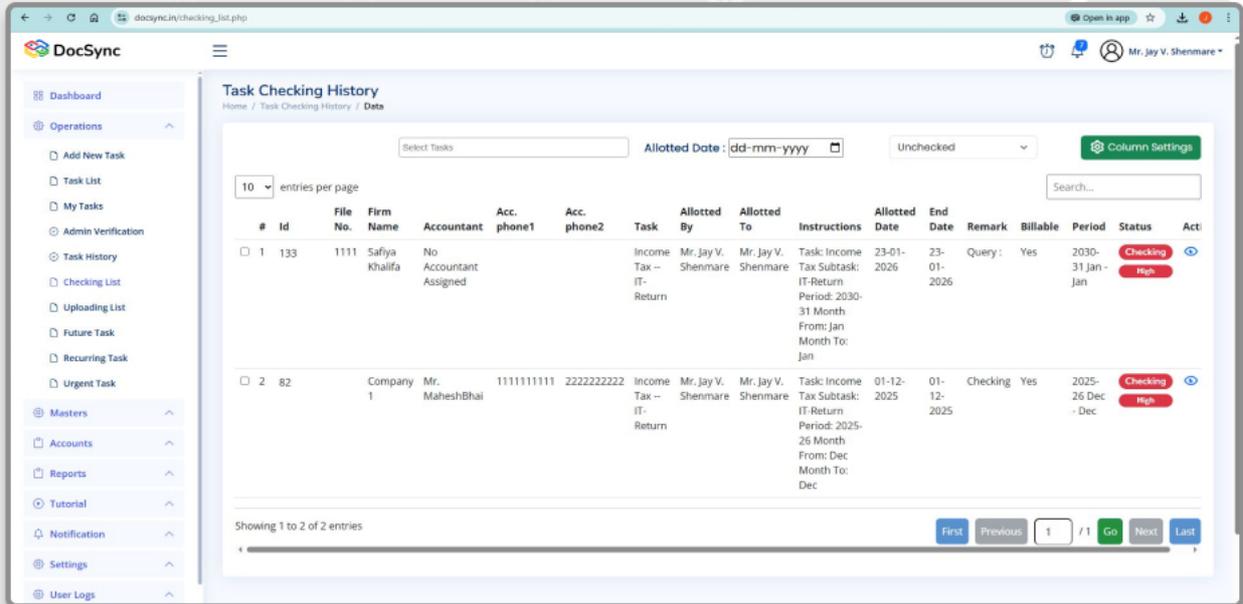
- Predefined SOPs for all compliance and client tasks
- Sub-task checklists for step-by-step execution
- Ensures uniform work quality across staff and clients
- Reduces dependency on specific individuals
- Helps junior staff follow correct processes
- Minimizes errors and rework



Document Fetcher

- Automated document collection from clients
- Sends predefined document request emails automatically
- Periodic reminder emails until documents are received
- Eliminates manual follow-ups by staff
- Improves client response time
- Ensures timely task completion during peak filing periods

Checking & Uploading



Task Checking History

Home / Task Checking History / Data

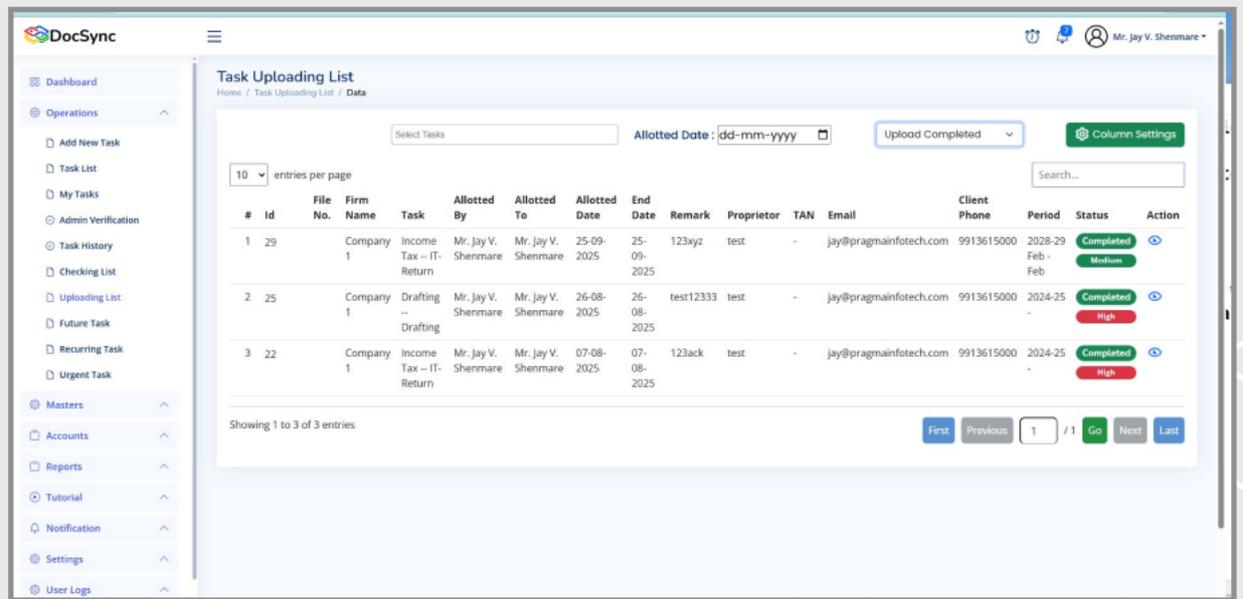
Select Tasks Allotted Date: dd-mm-yyyy Unchecked Column Settings

10 entries per page Search...

#	Id	File No.	Firm Name	Accountant	Acc. phone1	Acc. phone2	Task	Allotted By	Allotted To	Instructions	Allotted Date	End Date	Remark	Billable	Period	Status	Action
1	133	1111	Safiya Khalifa	No Accountant Assigned			Income Tax -- IT-Return	Mr. Jay V. Shenmare	Mr. Jay V. Shenmare	Task: Income Tax Subtask: IT-Return Period: 2030-31 Month From: Jan Month To: Jan	23-01-2026	23-01-2026	Query:	Yes	2030-31 Jan - Jan	Checking High	
2	82		Company 1	Mr. MaheshBhai	1111111111	2222222222	Income Tax -- IT-Return	Mr. Jay V. Shenmare	Mr. Jay V. Shenmare	Task: Income Tax Subtask: IT-Return Period: 2025-26 Month From: Dec Month To: Dec	01-12-2025	01-12-2025	Checking	Yes	2025-26 Dec - Dec	Checking High	

Showing 1 to 2 of 2 entries

First Previous 1 / 1 Go Next Last



Task Uploading List

Home / Task Uploading List / Data

Select Tasks Allotted Date: dd-mm-yyyy Upload Completed Column Settings

10 entries per page Search...

#	Id	File No.	Firm Name	Task	Allotted By	Allotted To	Allotted Date	End Date	Remark	Proprietor	TAN	Email	Client Phone	Period	Status	Action
1	29		Company 1	Income Tax -- IT-Return	Mr. Jay V. Shenmare	Mr. Jay V. Shenmare	25-09-2025	25-09-2025	123kyz	test	-	jay@pragmainfotech.com	9913615000	2028-29 Feb - Feb	Completed Medium	
2	25		Company 1	Drafting -- Drafting	Mr. Jay V. Shenmare	Mr. Jay V. Shenmare	26-08-2025	26-08-2025	test12333	test	-	jay@pragmainfotech.com	9913615000	2024-25 -	Completed High	
3	22		Company 1	Income Tax -- IT-Return	Mr. Jay V. Shenmare	Mr. Jay V. Shenmare	07-08-2025	07-08-2025	123ack	test	-	jay@pragmainfotech.com	9913615000	2024-25 -	Completed High	

Showing 1 to 3 of 3 entries

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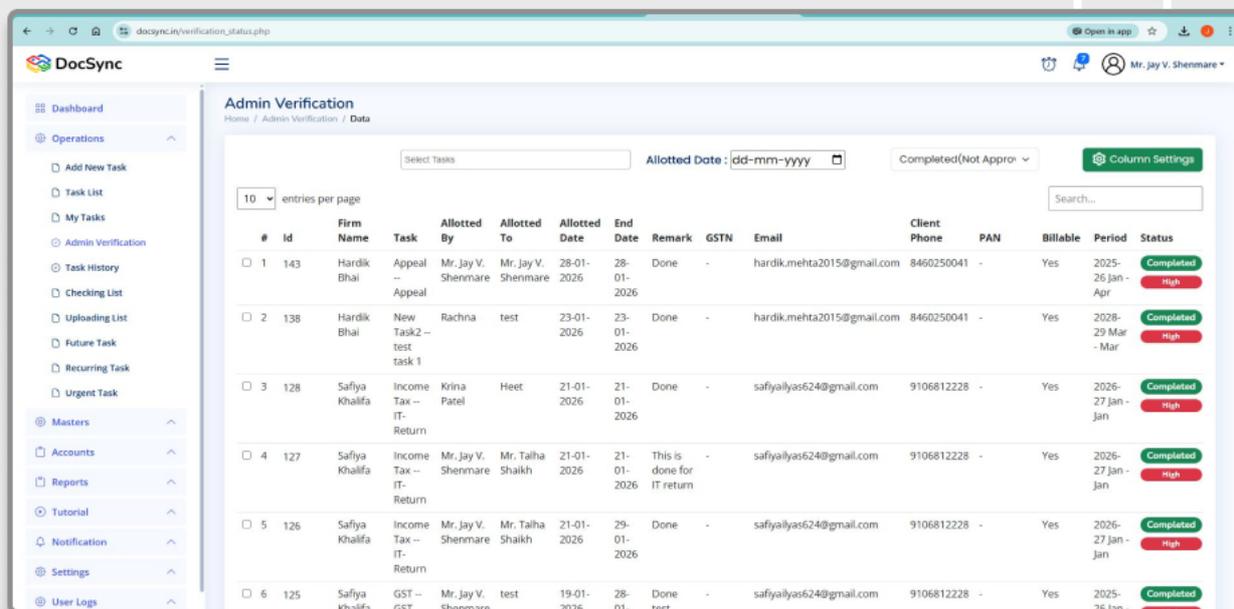
Video Tutorial 

Checking & Uploading module

- Structured checking stage to verify work before upload
- Ensures segregation of duties within the team
- Reduces errors prior to final submission
- Clear responsibility for review and document uploading
- Improves overall process discipline in CA firms

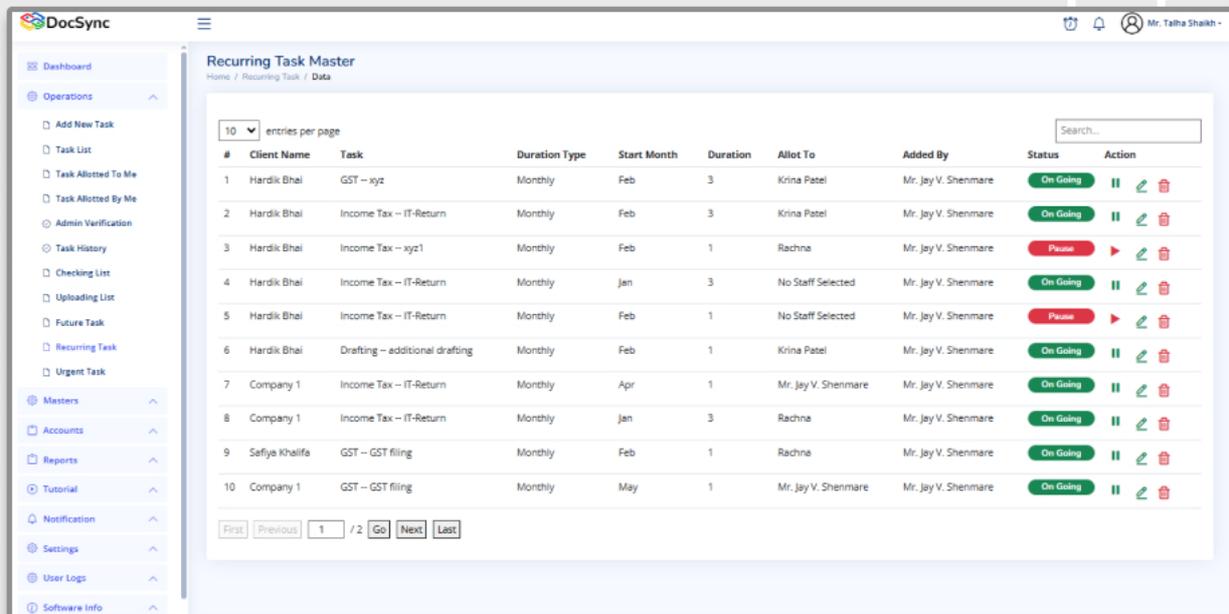
Video Tutorial





Admin verification

- Final admin-level approval before submission
- Ensures compliance accuracy and quality control
- Seniors/admins can approve or send back tasks for correction
- Maintains a complete audit trail
- Builds client trust through controlled verification

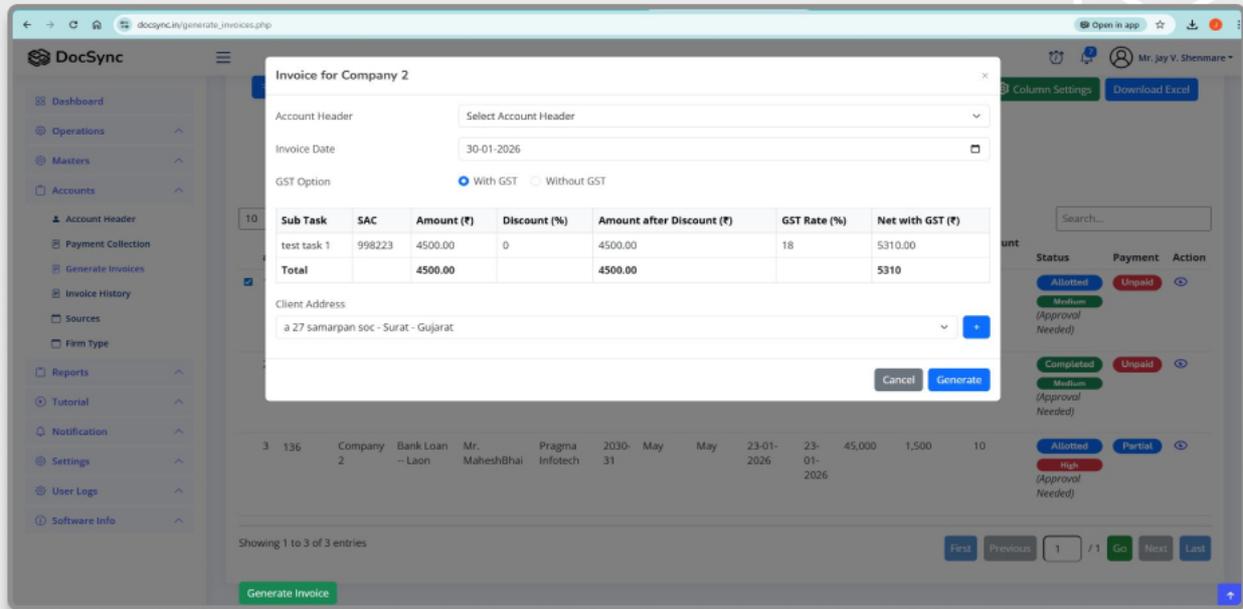


Recurring Task

- Recurring tasks for CA compliances like GST returns, TDS filings, ROC work, and audits
- Supports monthly, quarterly, and annual schedules
- Auto-generates tasks as per schedule—no manual reminders or follow-ups
- Ensures timely compliance for all clients
- Duplicate tasks instantly from existing ones
- Maintains consistent structure, timelines, and responsibilities across clients
- Saves significant time during high-volume filing periods

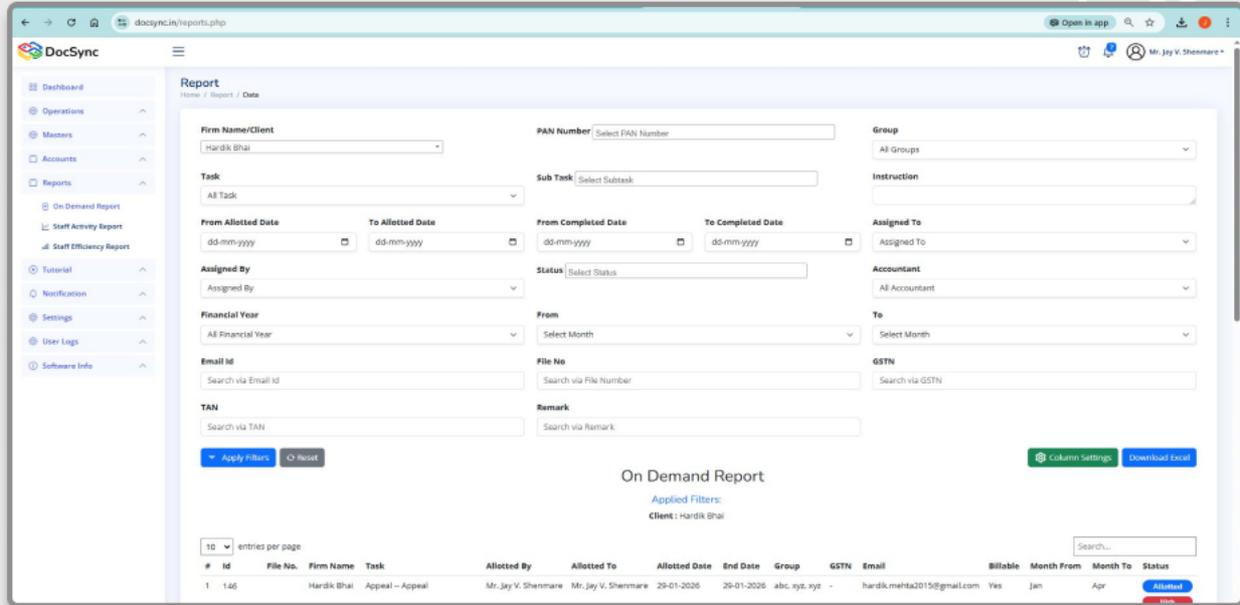
Video Tutorial





Multi-Firm Invoice Generation

- Multi-firm invoice management from a single DocSync account
- Ideal for CA groups, franchises, and multi-entity professionals
- Separate invoice formats, numbering, GST details, and branding for each firm
- Generate invoices based on completed tasks or billing cycles
- Ensures accurate, compliant billing without switching systems



Reports

- Real-time reports for better decision-making in CA firms
- On-Demand Reports for instant insights anytime
- Staff Activity Reports to track workload and task progress
- Staff Efficiency Reports to measure productivity and turnaround time
- Invoice Reports to monitor billing, collections, and revenue
- Helps identify bottlenecks and optimize staff utilization

Video Tutorial

