DocSync
Software for CAs

- Simpler & Easier than Excel
- Loaded with Practical Features
- Saves Time
- Increase Efficiency
- Budget Friendly
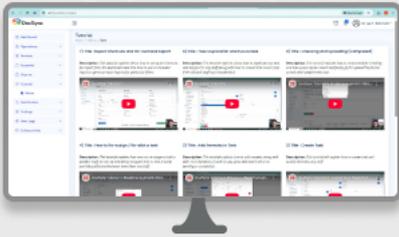
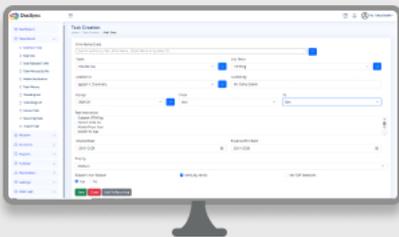*https://docsync.in*

Powered by **pragma** infotech™

A/27,Samarpan Society- Adajan Patia-Surat-Gujarat-India
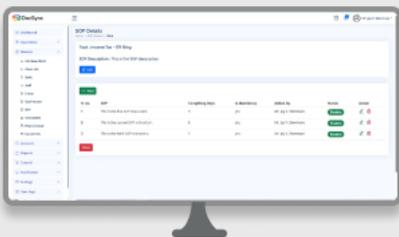
📞 +91 9825557616

Video Tutorials

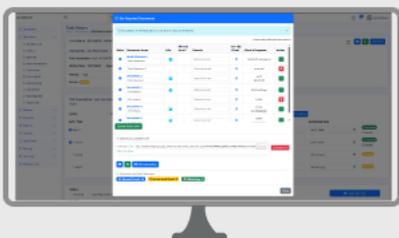Learn faster with built-in video tutorials for all the major sections.

Fastest Way to Create Tasks

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

Define SOPs for Tasks

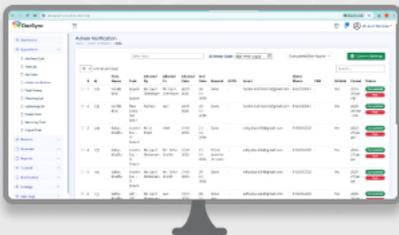Standardize work with predefined SOPs and sub-tasks.

Document Fetcher

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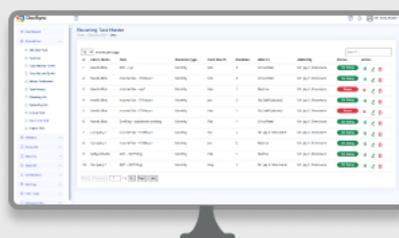Automated client's documents collection without manual follow-ups.

Checking and Uploading Module

Review documents, raise and resolve queries, and finalize them for submission on the relevant portals (GST, Income Tax, etc.).
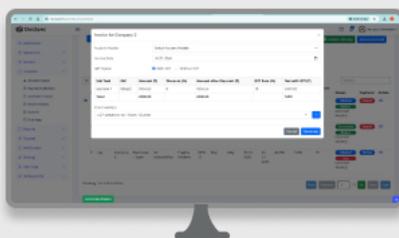
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Admin Verification
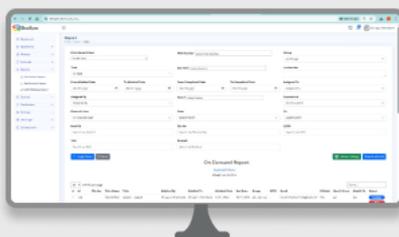Clear accountability with multi-stage task verification.

Recurring Task & Duplicate task
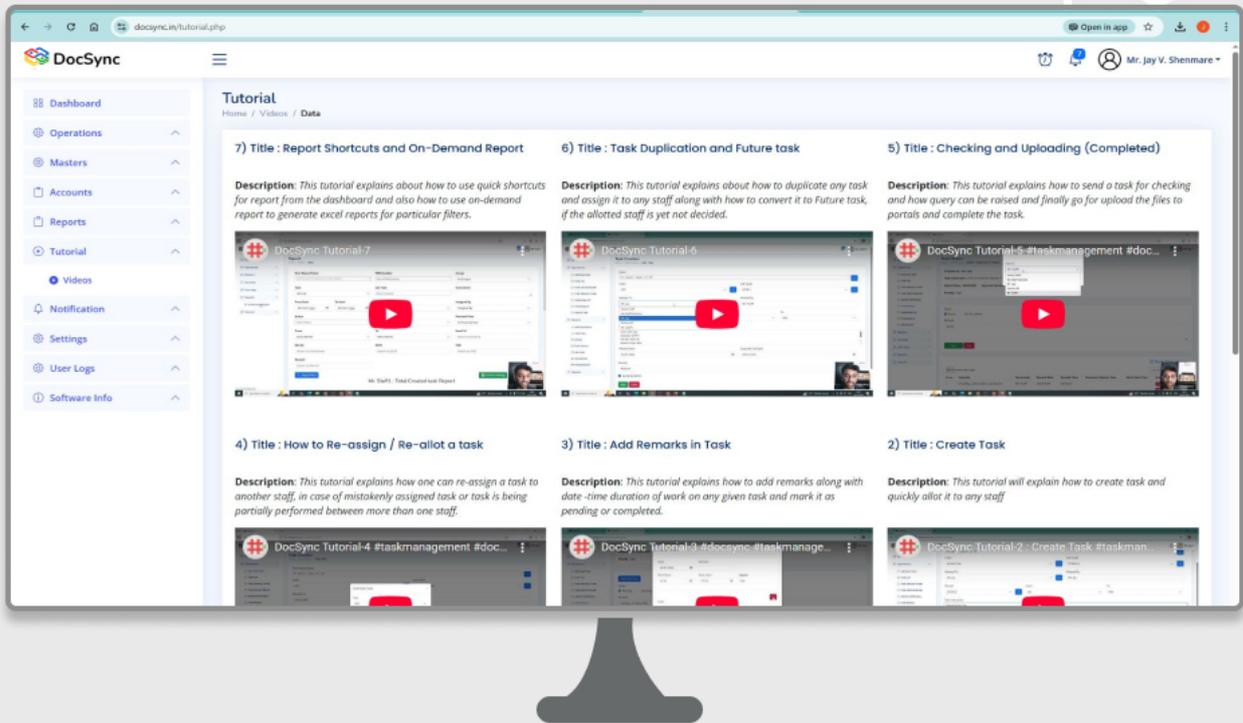Automate repetitive work with recurring and duplicate tasks.

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.
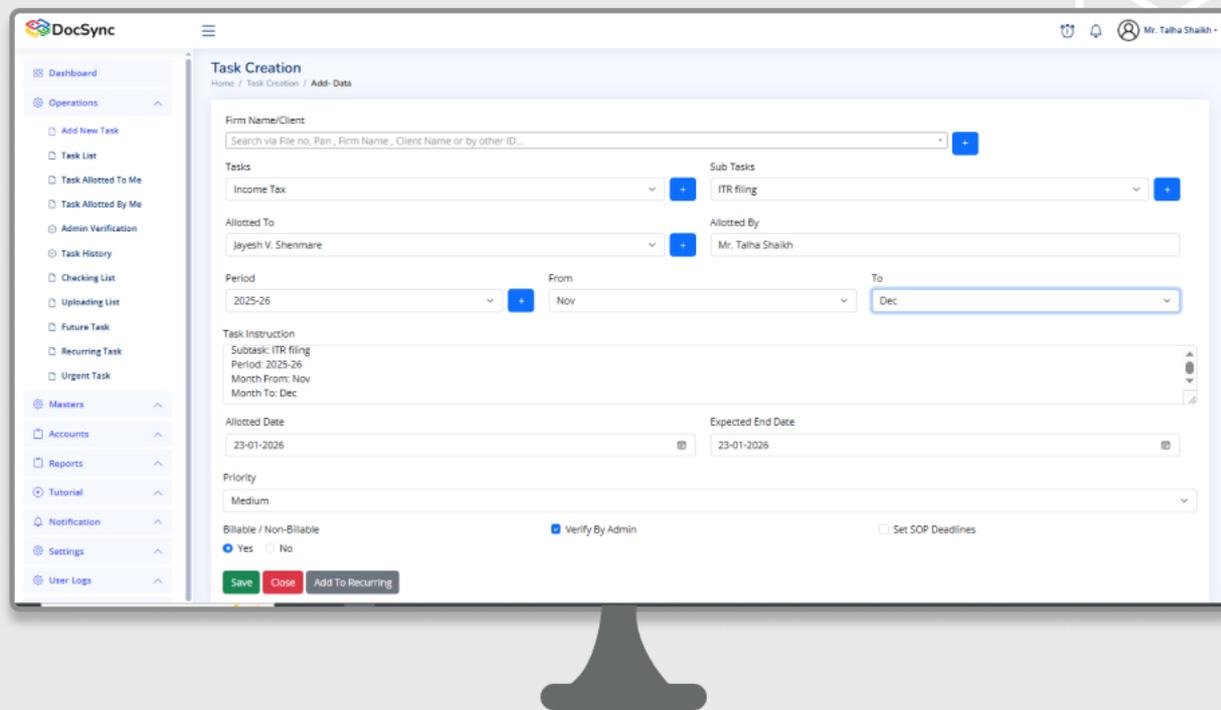
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Video Tutorials

- 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 ▶

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Software for CAs

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

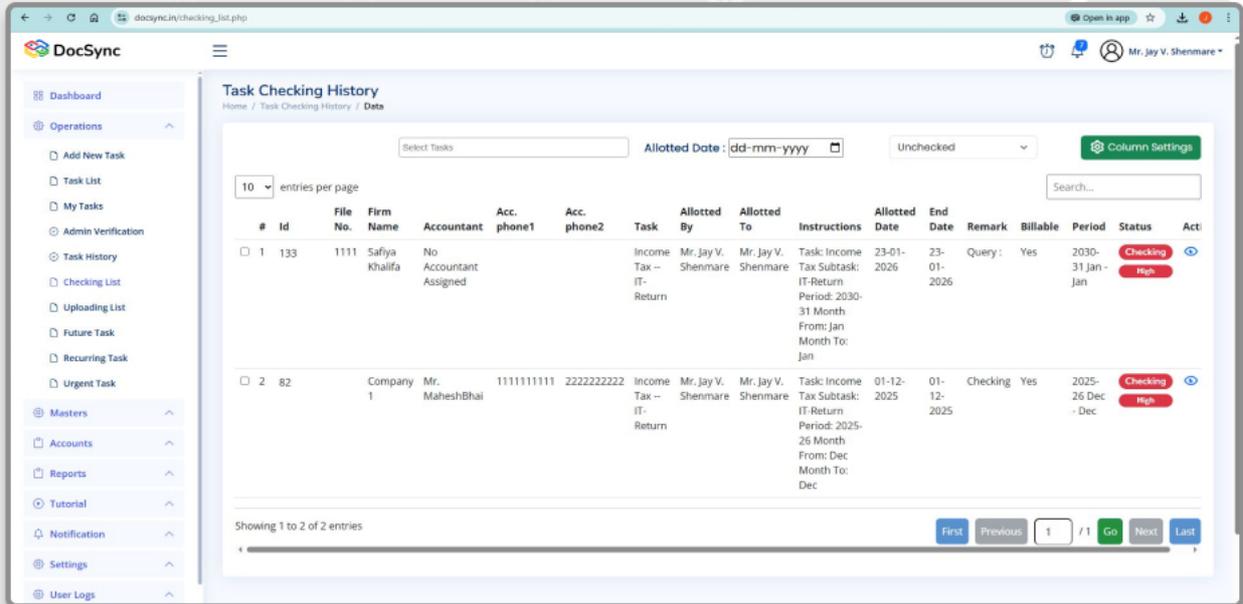**Video Tutorial** ▶
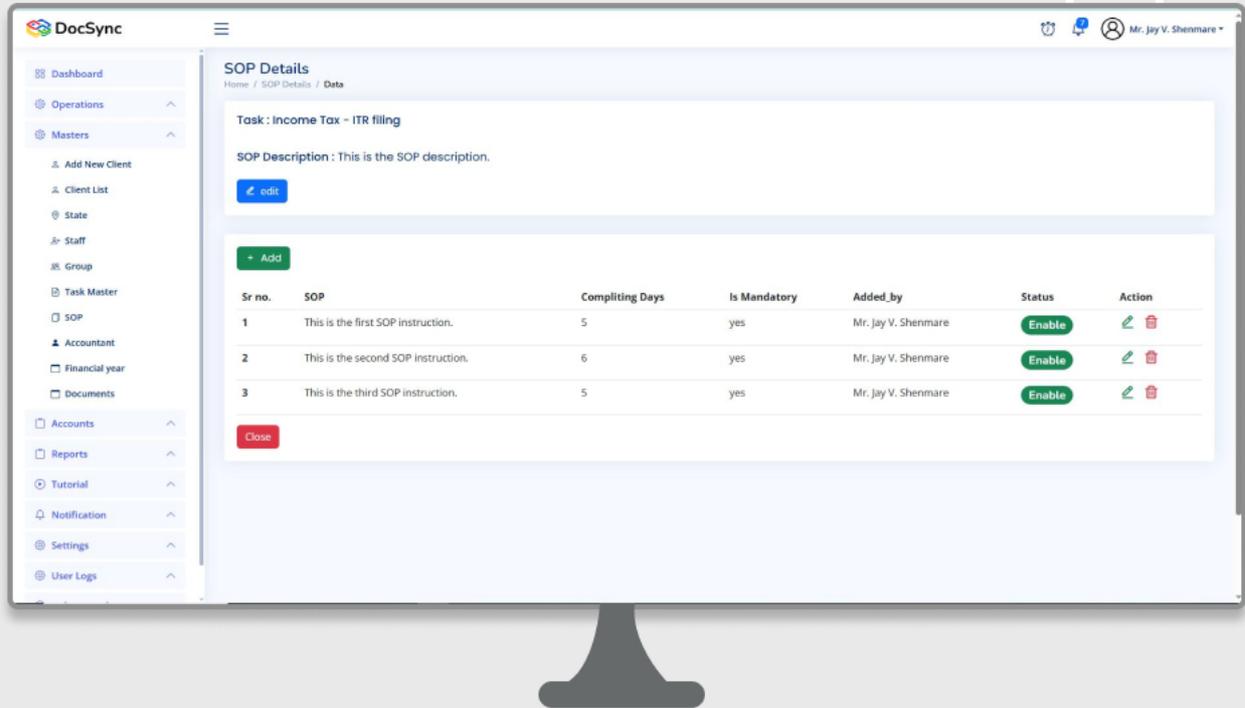
Define SOPs for Tasks

- 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
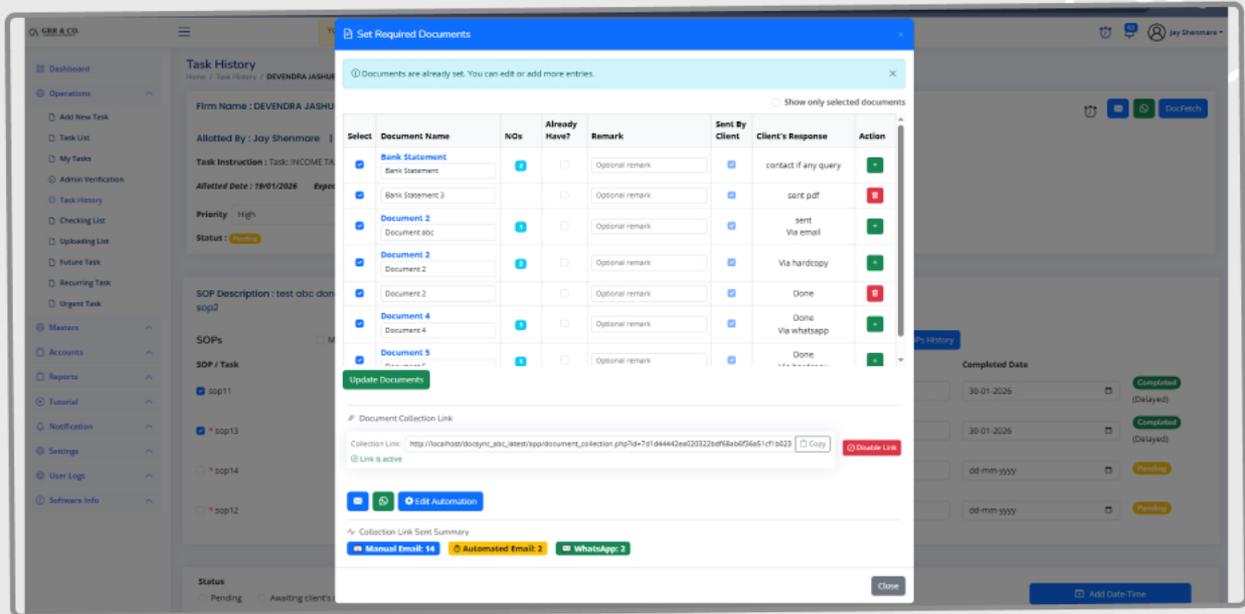
Document Fetcher

- 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

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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 ▶

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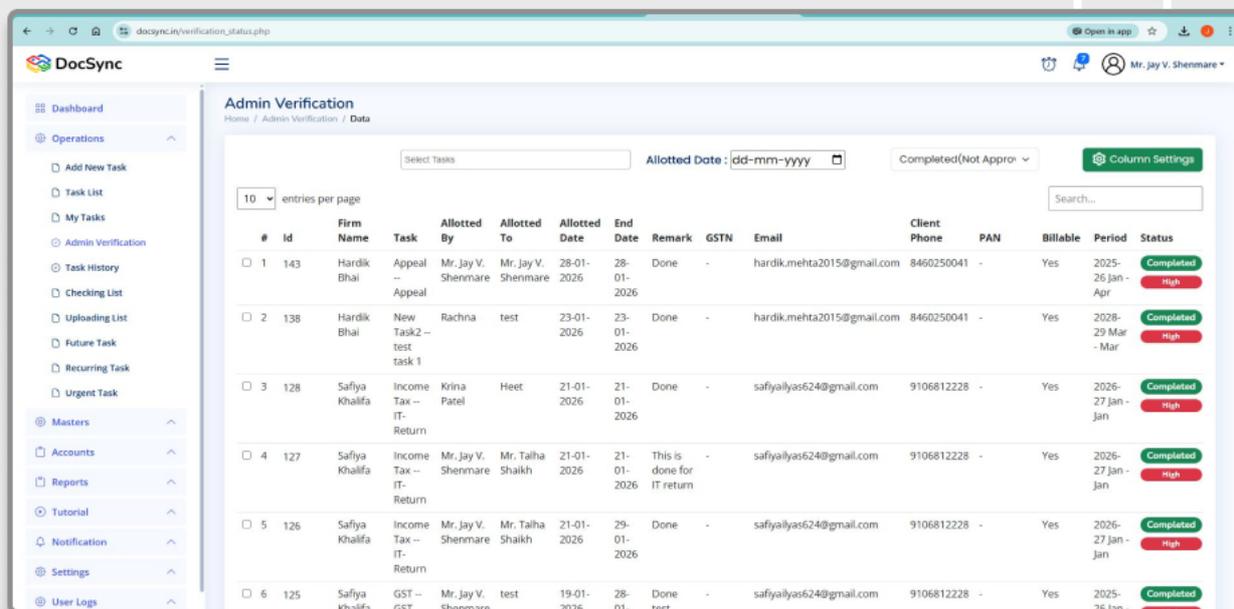
Admin verification

• 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

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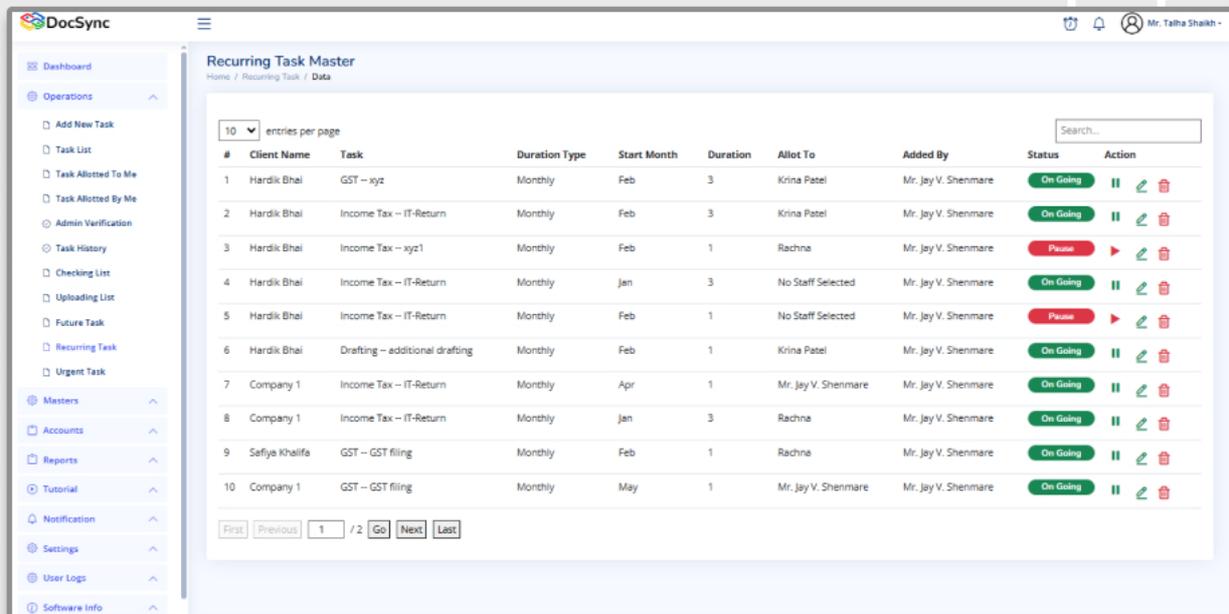

Recurring Task

• 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 ▶
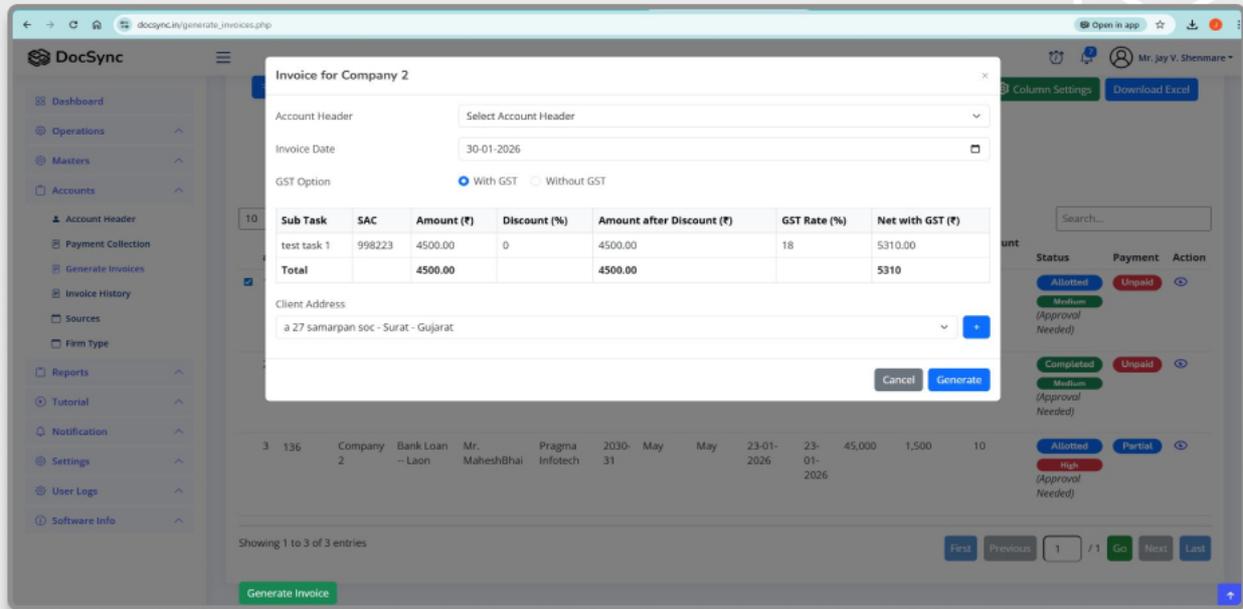
Multi-Firm Invoice Generation

• 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

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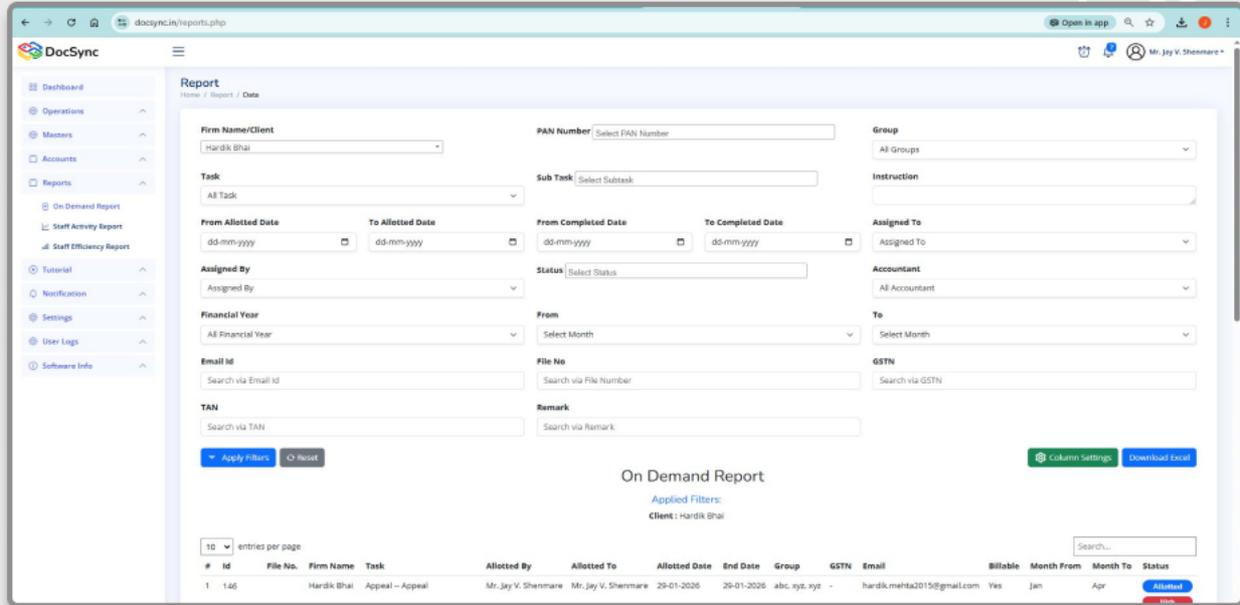
Reports

- 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