



DocSync **Software for CAs**

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

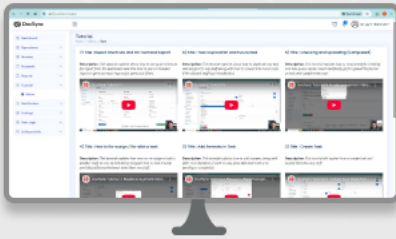
[*https://docsync.in*](https://docsync.in)

Powered by



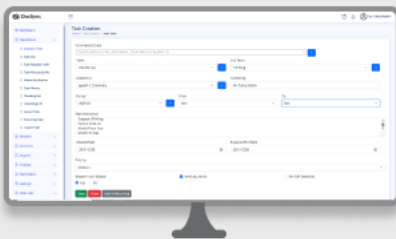
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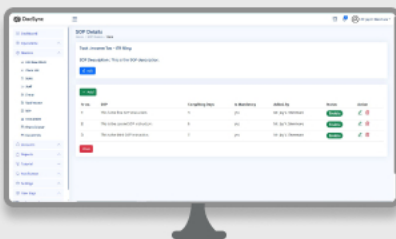
Video Tutorials

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.



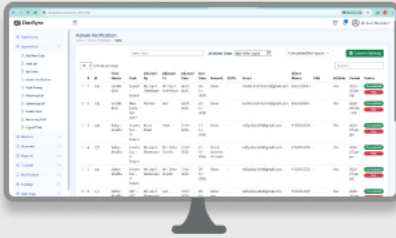
Document Fetcher

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



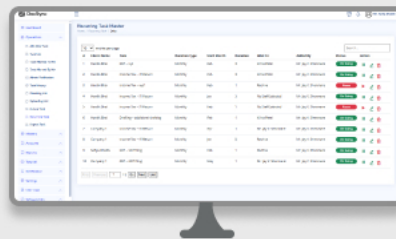
Checking and Uploading Module

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



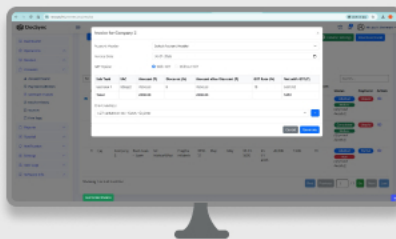
Admin Verification

Clear accountability with multi-stage task verification.



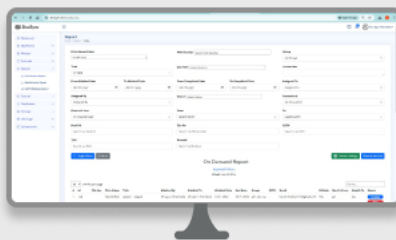
Recurring Task & Duplicate task

Automate repetitive work with recurring and duplicate tasks.



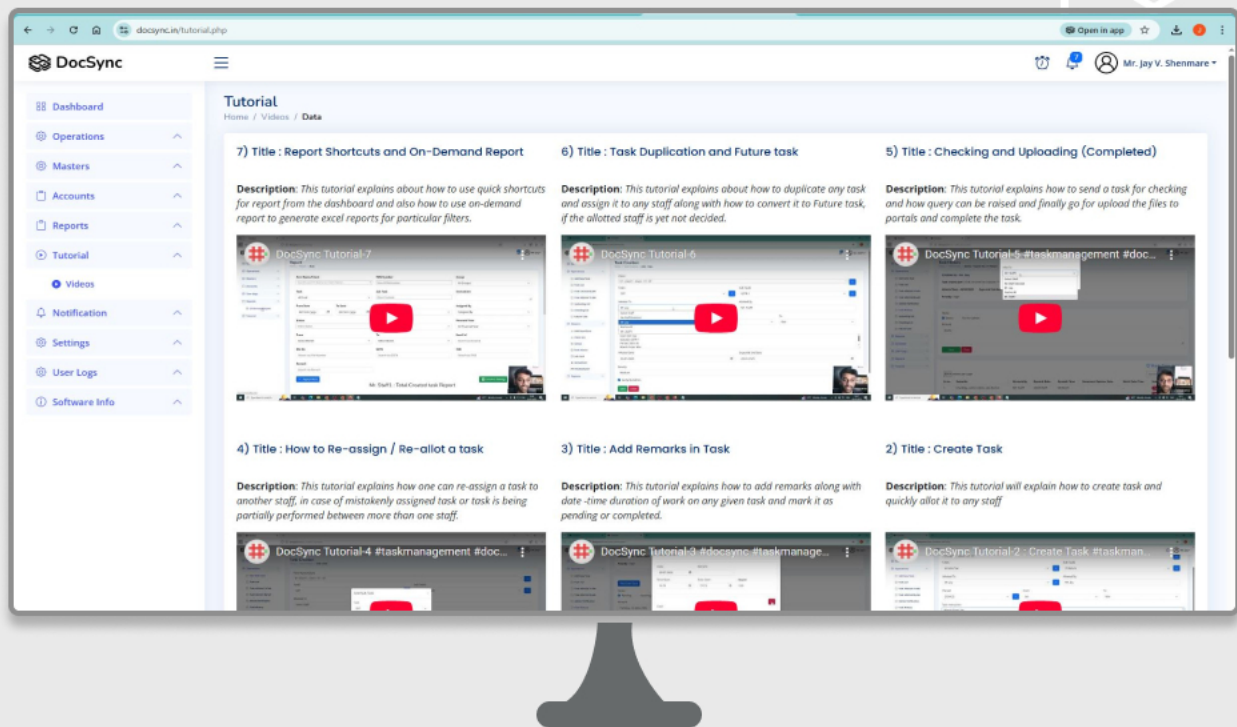
Multi-Firm Invoice Generation

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.

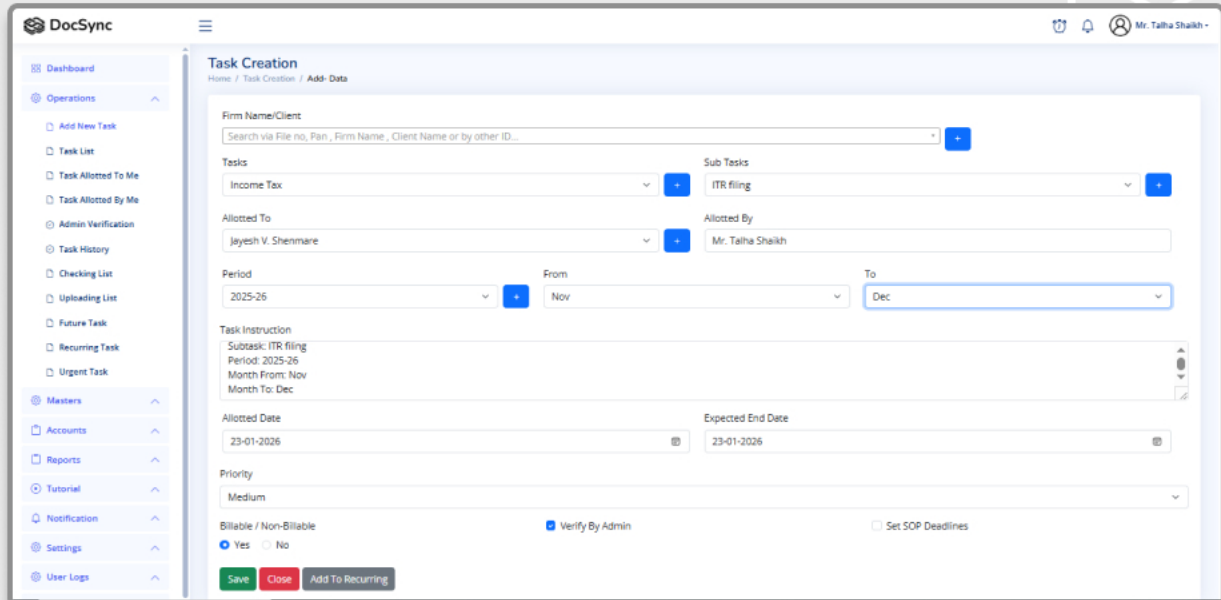


Video Tutorials

- 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





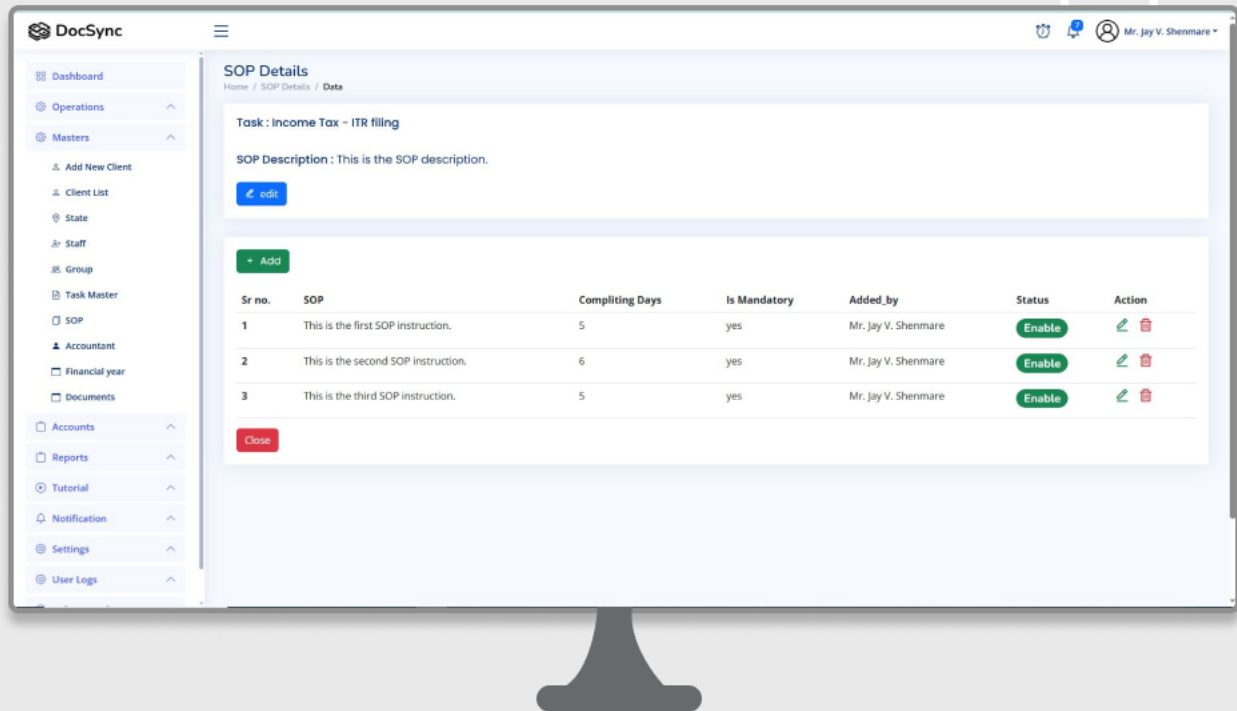
The screenshot shows the 'Task Creation' form in the DocSync application. The interface includes a sidebar with navigation options like Dashboard, Operations, Masters, Accounts, Reports, Tutorial, Notification, Settings, and User Logs. The main form fields are: Firm Name/Client (searchable), Tasks (Income Tax), Sub Tasks (ITR filing), Allotted To (Jayesh V. Shenmare), Allotted By (Mr. Talha Shaikh), Period (2025-26), From (Nov), To (Dec), Task Instruction (Subtask: ITR filing, Period: 2025-26, Month From: Nov, Month To: Dec), Allotted Date (23-01-2026), Expected End Date (23-01-2026), Priority (Medium), and Billable / Non-Billable (Yes selected). There are also checkboxes for 'Verify By Admin' and 'Set SOP Deadlines'. At the bottom, there are buttons for 'Save', 'Close', and 'Add To Recurring'.

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

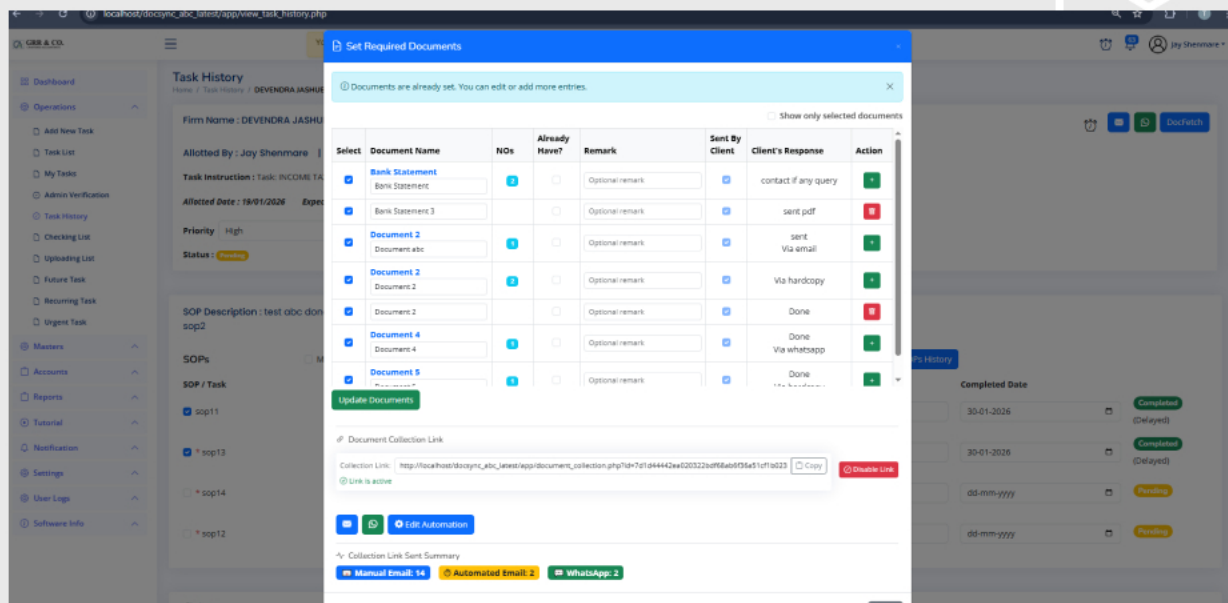
Video Tutorial





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

The screenshot shows the 'Task Checking History' page in the DocSync application. The left sidebar contains navigation options: Dashboard, Operations (with sub-options like Add New Task, Task List, My Tasks, Admin Verification, Task History, Checking List, Uploading List, Future Task, Recurring Task, Urgent Task), Masters, Accounts, Reports, Tutorial, Notification, Settings, and User Logs. The main content area displays a table of task checking history with columns: #, Id, File No., Firm Name, Accountant, Acc. phone1, Acc. phone2, Task, Allotted By, Allotted To, Instructions, Allotted Date, End Date, Remark, Billable, Period, Status, and Action. Two tasks are listed, both with a status of 'Checking' and a 'High' priority. The first task is for Safiya Khalifa, and the second is for Company 1 (Mr. MaheshBhai). The interface includes filters for 'Select Tasks', 'Allotted Date', and 'Unchecked', along with a 'Column Settings' button and a search bar. Pagination at the bottom shows 'Showing 1 to 2 of 2 entries'.

#	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

The screenshot shows the 'Task Uploading List' page in the DocSync application. The left sidebar is identical to the previous screenshot. The main content area displays a table of task uploading history with columns: #, Id, File No., Firm Name, Task, Allotted By, Allotted To, Allotted Date, End Date, Remark, Proprietor, TAN, Email, Client Phone, Period, Status, and Action. Three tasks are listed, all with a status of 'Completed' and a 'High' priority. The tasks are for Company 1, involving Income Tax - IT-Return, Drafting, and Income Tax - IT-Return. The interface includes filters for 'Select Tasks', 'Allotted Date', and 'Upload Completed', along with a 'Column Settings' button and a search bar. Pagination at the bottom shows 'Showing 1 to 3 of 3 entries'.

#	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	123xyz	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

Video Tutorial

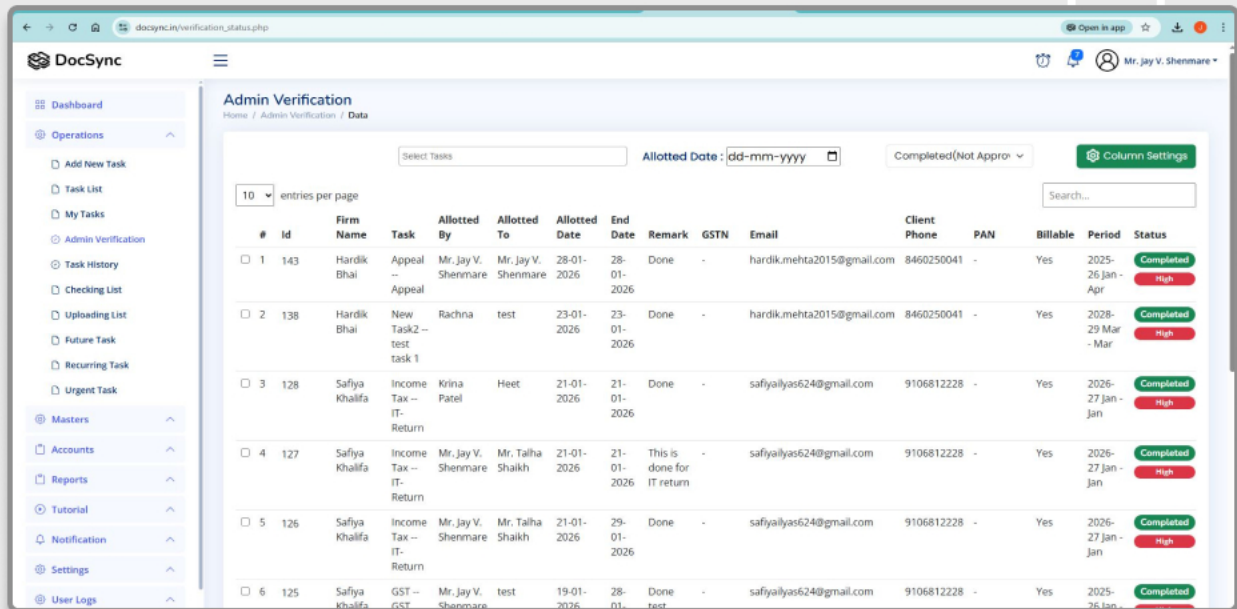


Checking & Uploading module

- 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



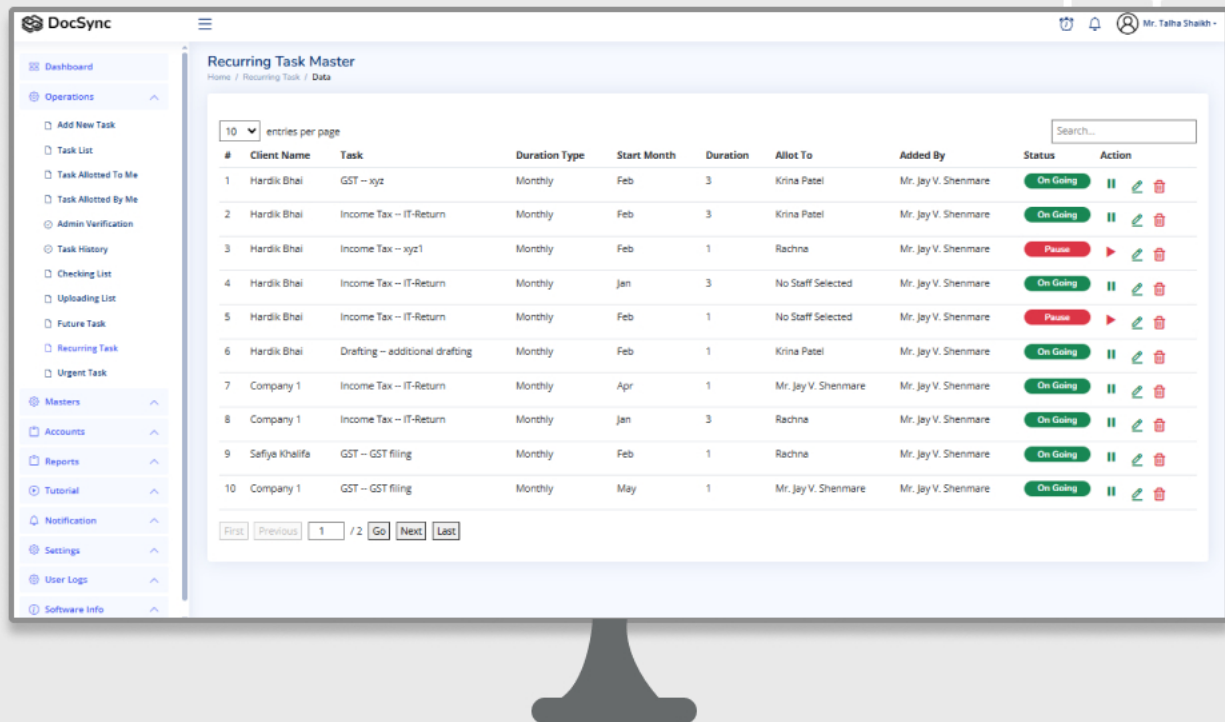


The screenshot displays the 'Admin Verification' page in the DocSync application. The interface includes a sidebar with navigation options like Dashboard, Operations, Masters, Accounts, Reports, Tutorial, Notification, Settings, and User Logs. The main content area shows a table of tasks with the following data:

#	Id	Firm Name	Task	Allotted By	Allotted To	Allotted Date	End Date	Remark	GSTN	Email	Client Phone	PAN	Billable	Period	Status
1	143	Hardik Bhai	Appeal -- Appeal	Mr. Jay V. Shenmare	Mr. Jay V. Shenmare	28-01-2026	28-01-2026	Done	-	hardik.mehta2015@gmail.com	8460250041	-	Yes	2025-26 Jan - Apr	Completed High
2	138	Hardik Bhai	New Task2 -- test task 1	Rachna	test	23-01-2026	23-01-2026	Done	-	hardik.mehta2015@gmail.com	8460250041	-	Yes	2028-29 Mar - Mar	Completed High
3	128	Safiya Khalifa	Income Tax -- IT-Return	Kirina Patel	Heet	21-01-2026	21-01-2026	Done	-	safiyailias624@gmail.com	9106812228	-	Yes	2026-27 Jan - Jan	Completed High
4	127	Safiya Khalifa	Income Tax -- IT-Return	Mr. Jay V. Shenmare	Mr. Talha Shaikh	21-01-2026	21-01-2026	This is done for IT return	-	safiyailias624@gmail.com	9106812228	-	Yes	2026-27 Jan - Jan	Completed High
5	126	Safiya Khalifa	Income Tax -- IT-Return	Mr. Jay V. Shenmare	Mr. Talha Shaikh	21-01-2026	29-01-2026	Done	-	safiyailias624@gmail.com	9106812228	-	Yes	2026-27 Jan - Jan	Completed High
6	125	Safiya Khalifa	GST --	Mr. Jay V. Shenmare	test	19-01-2026	28-01-2026	Done test	-	safiyailias624@gmail.com	9106812228	-	Yes	2025-26 Jan -	Completed High

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

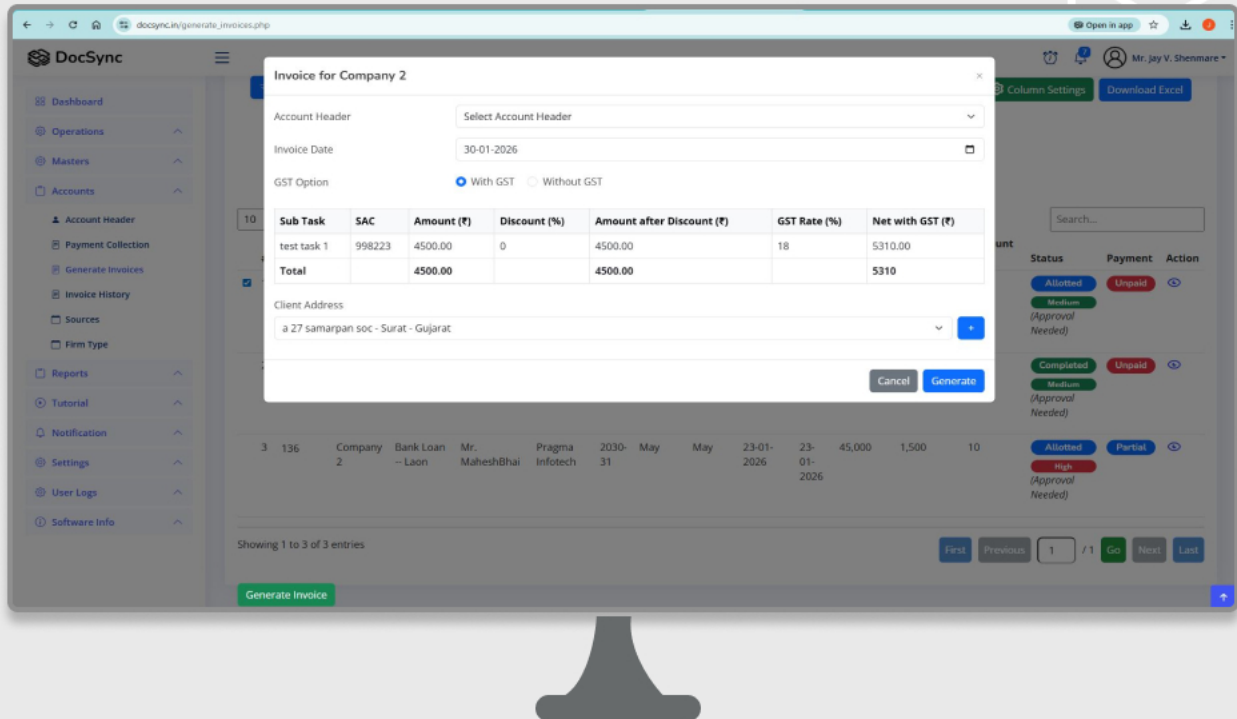


Recurring Task

- 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

The screenshot displays the DocSync Reports interface. On the left is a sidebar with navigation options: Dashboard, Operations, Masters, Accounts, Reports, On Demand Report, Staff Activity Report, Staff Efficiency Report, Tutorial, Notification, Settings, User Logs, and Software Info. The main area is titled 'Report' and contains a 'Filter' section with various input fields for searching and filtering data. Below the filters, there is a table of report entries.

#	ID	File No.	Firm Name	Task	Allotted By	Allotted To	Allotted Date	End Date	Group	GSTN	Email	Billable	Month From	Month To	Status
1	146		Hardik Bhai	Appeal - Appeal	Mr. Jay V. Shenmare	Mr. Jay V. Shenmare	29-01-2026	29-01-2026	abc. nys. xyz	-	hardik.mehta2015@gmail.com	Yes	Jan	Apr	Allocated

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

