Problem

In the accounting office, employees must be on top of managing multiple documents and procedures that must be submitted by a certain deadline, these documents must be submitted for each client, which can cause errors or confusion, leading to delays and non-compliance.

The main problem is that there is no system that automatically notifies employees, which would help ensure organized and efficient management of obligations.

Overview

Our project will help our customer to improve document management and compliance within the accounting office. Currently, employees handle multiple client files and deadlines manually, which often leads to confusion, delays, and missed submissions. The absence of an automated notification system makes it difficult to maintain order and efficiency. Our project aims to solve this issue by developing a system that automatically alerts employees of upcoming deadlines, ensuring timely submissions, minimizing human error and enhancing overall workflow management.

Background

In the accounting office, a large number of procedures and document submissions must be completed on established deadlines, both for companies, small businesses, and individuals.

Among the main documents submitted are tax returns, financial statements, withholdings, annexes, employment reports, payroll forms, and other required files.

Each document submitted has a deadline set by the type of client. This requires employees to maintain constant control over the deadlines and delivery dates for the documents that must be managed for each client.

The current process is usually done using spreadsheets (Excel), which increases human error, loss of information, or confusion regarding the deadlines established for each client. Furthermore, managing multiple clients makes it difficult to remember each obligation on time, Facilitating work organization, preventing delays, and optimizing task distribution to enhance the office’s productivity and compliance, which can help avoid delays in documentation and potential penalties or fines for non-compliance.

To solve this problem, we propose developing an automatic alert system that `xallows for the registration of clients, document types, and their due dates. The system will allow alerts or reminders to be sent to employees before each due date, Promoting orderly workflow and timely task completion.

Analyst Comparison

To compare the performance of employees within the accounting office, our system will record and analyze each worker’s task history, such as document submissions and deadline compliance. Similar to how analysts are compared by their profit and efficiency, employees will be evaluated based on their punctuality, accuracy, and completion rate. Each employee will have a record of completed tasks, pending documents, and delays.

From these records, the system will calculate an overall **Performance Index (PI)**, which represents the ratio between tasks completed on time and total assigned tasks. Additional metrics, such as **Average Delay (AD)** and **Efficiency per Day (EPD)**, will help identify the most reliable and efficient employees. This comparison will allow managers to recognize top performers, provide feedback, Facilitating work organization, preventing delays, and optimizing task distribution to enhance the office’s productivity and compliance.

