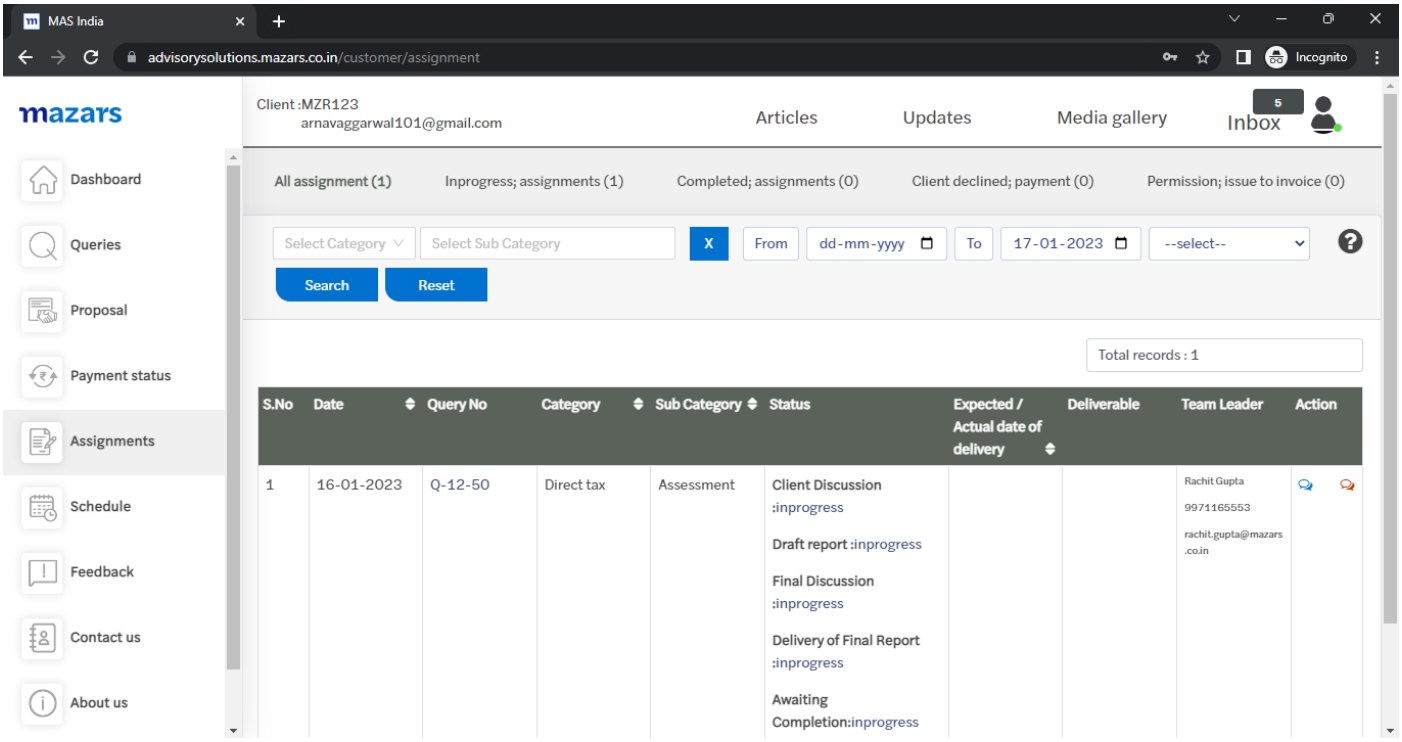
Query Detail Page: Proposal

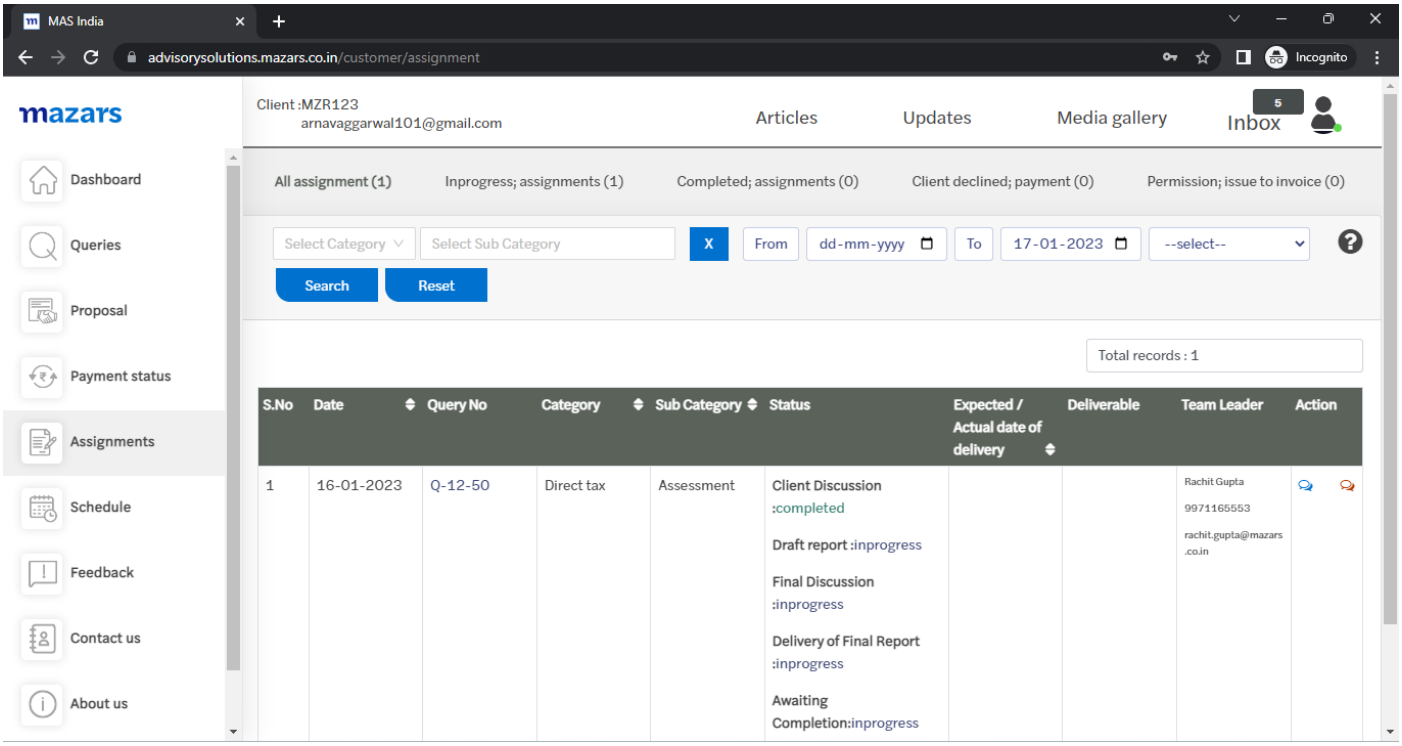
Date of allocation	• Date of allocation of the query to a Team Leader.
Name of Team Leader	• Shows the Designation & Name of the Team Leader.
Date of Proposal	• Date of online sending of proposal to the client by Mazars Advisory Solutions Team.
Scope of Work	• Scope of work arising from the query.
Payment Plan	• Payment plan is selected by the Mazars Advisory Solutions Team in consultation with the client. Following payment plans are available: a) Fixed Amount – One payment b) Fixed Amount – Payment in maximum four instalments c) Retainership Plan – Specified period d) Retainership Plan – Unspecified period (no end date)
Payment Terms	• Shows the payment terms, instalment amount(s) & their due dates, if any.
Proposed Amount	• Amount proposed by the Mazars Advisory Solutions Team for execution of the query.
Proposal Status	• After the proposal is sent to the client, status is shown as in progress & the status changes to accepted or rejected upon acceptance or rejection of the proposal by the client.
Amount accepted	• Amount accepted by the client for execution of the query.
Date of Acceptance / Decline	• Date of acceptance or decline of the proposal by the client.
Payment History	• Shows the details of payment made by the client.
Payment Received	• Shows the total amount paid by the client.
Payment Outstanding	• Shows the outstanding amount payable by the client.
Payment decline reason	• In case client declines to make payment of outstanding amount, Team Leader can mark the query as payment declined by the client. In this situation, reasons recorded by the Team Leader for such marking are displayed here.
(After accepting the proposal, the client can view progress of the query under the assignment tab)	

Under Assignments Tab, the client can view the processing progress of the query.

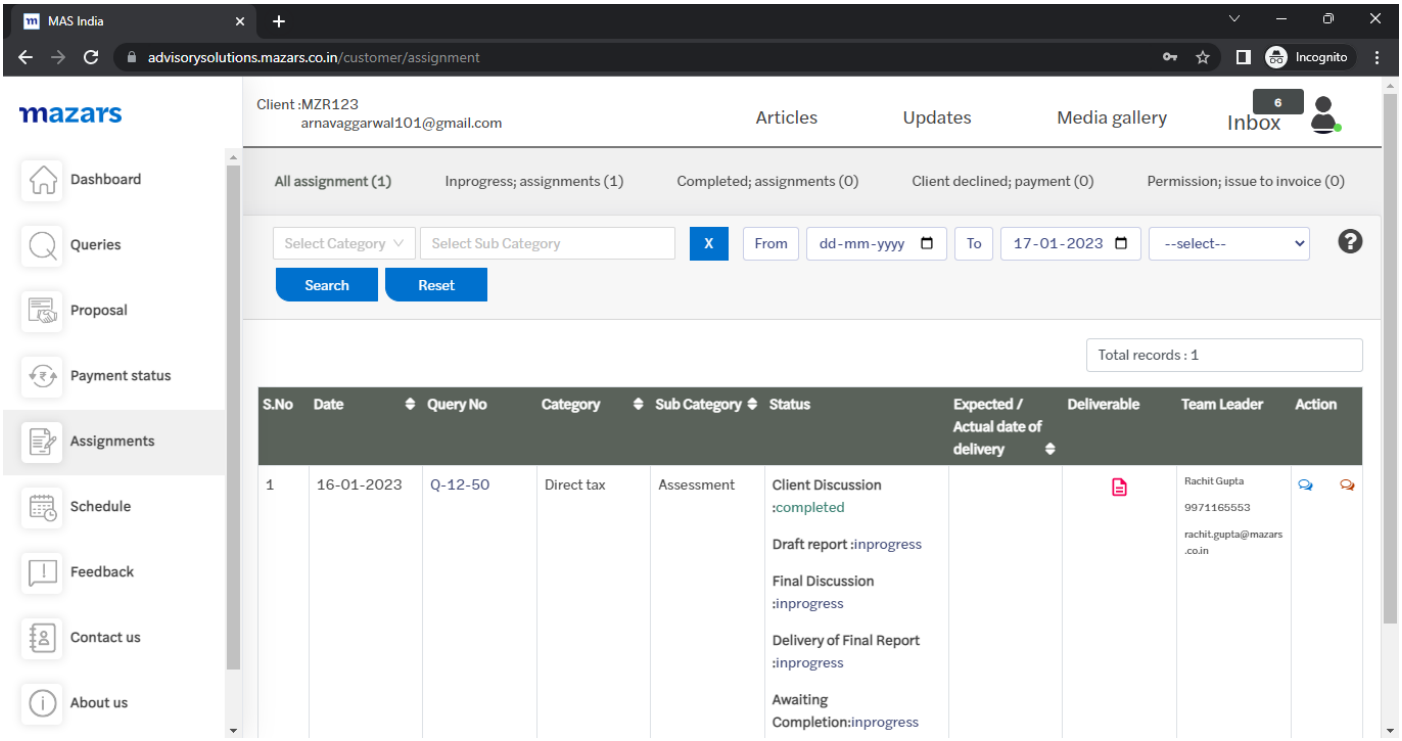


After the Mazars Advisory Solutions Team has sent online draft reports for discussion with the client, following screen will be visible to the client. An email will also be sent to the client every time any draft report is uploaded along with the draft report(s).

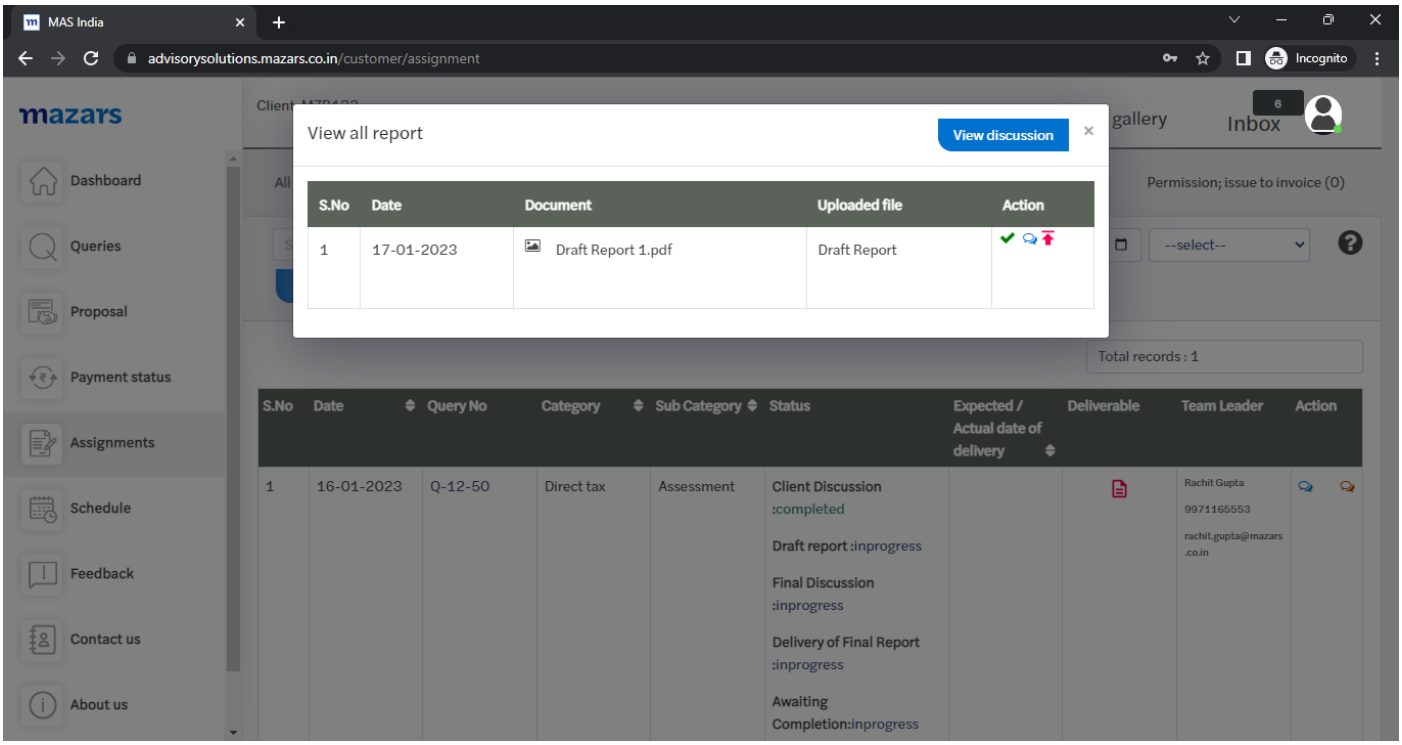
The client can send a message specifying the secondary email users to whom draft reports may also be sent. Upon such request, email will be sent to such secondary email users along with copy of draft reports.



Under the Deliverable, by clicking on the view all report icon the draft reports can be viewed & downloaded by the client. Following screen will be visible to the client.



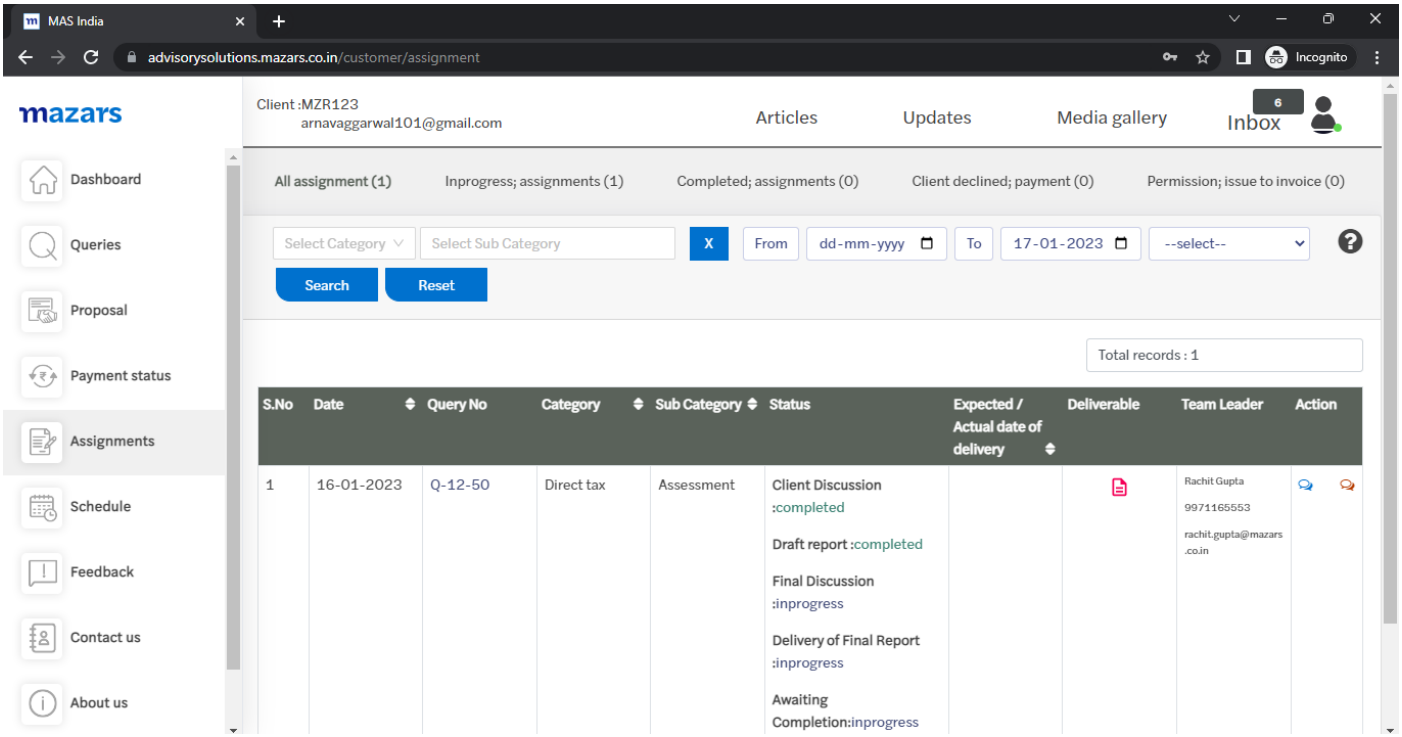
After clicking on following screen will be visible.



View all Reports: Action Buttons

✔	• Client can accept the draft report by clicking on this icon.
💬	• In case client wants amendment in the draft report, he can send his suggestion(s) by clicking this icon. The client can also seek meeting with the Mazars Advisory Solutions Team for discussion on the draft report by sending the message.
⬆	• The client can also himself make changes in the draft report incorporating his suggestion & upload it for review by the Mazars Advisory Solutions Team. Only one file can be uploaded against each draft report.

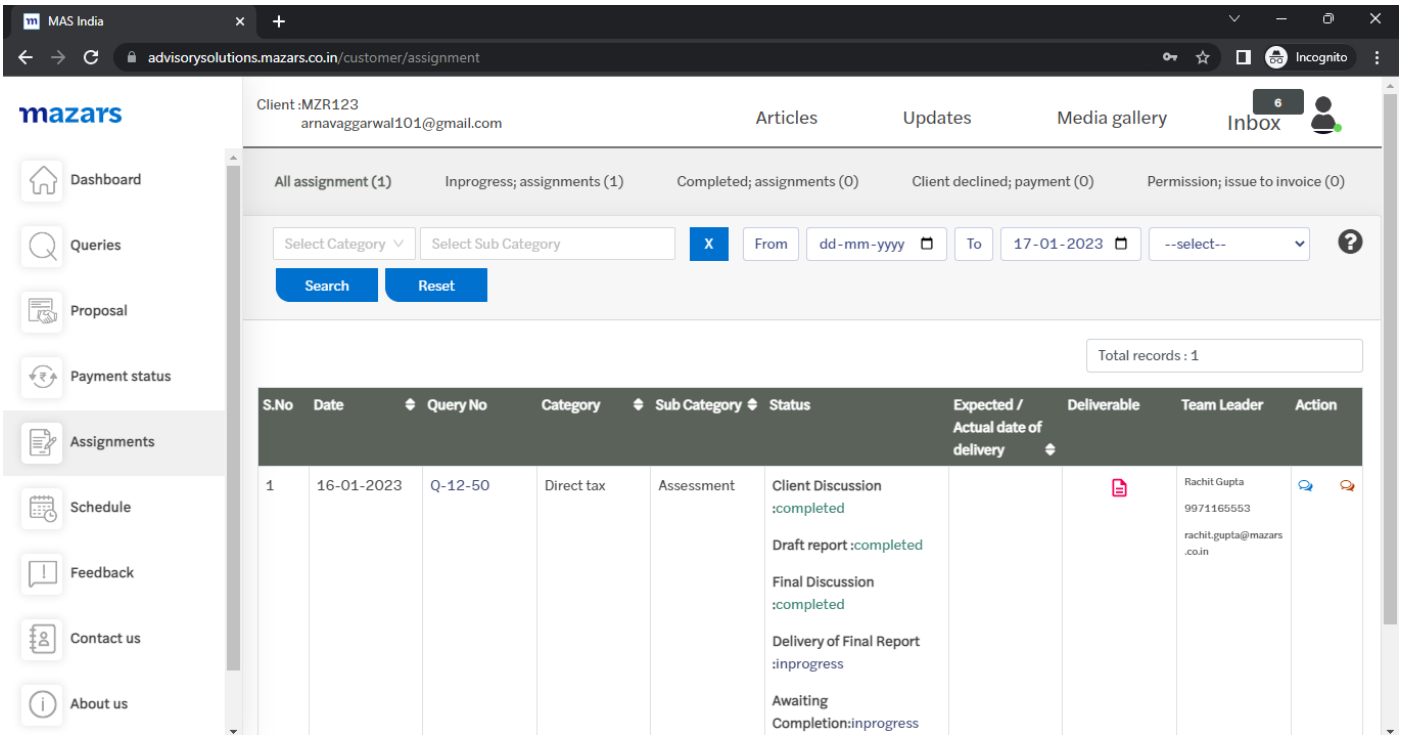
After the discussion on draft report(s) is completed, Mazars Advisory Solutions Team will mark the progress status of assignment as draft report completed & will move on to finalization of the report. At this stage, further discussion with the client may take place, if required.



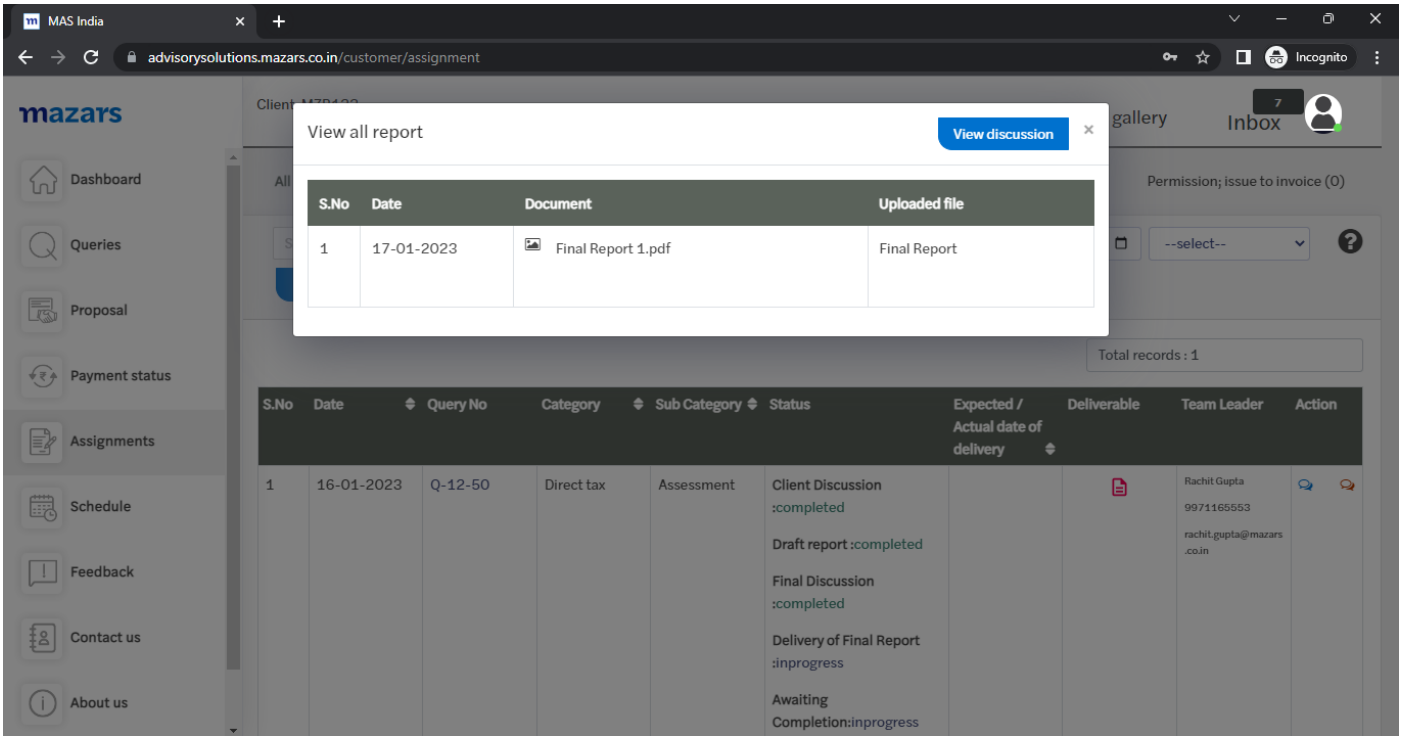
After such discussion, final reports are uploaded by the Mazars Advisory Solutions Team & are visible to the client under the deliverable's icon as below. An email will be sent to the client along with the final reports as & when uploaded by the Team.

The client can also specify the secondary email users by sending message to the Team. An email will be sent to all such secondary email users along with the final reports as & when uploaded by the Team.

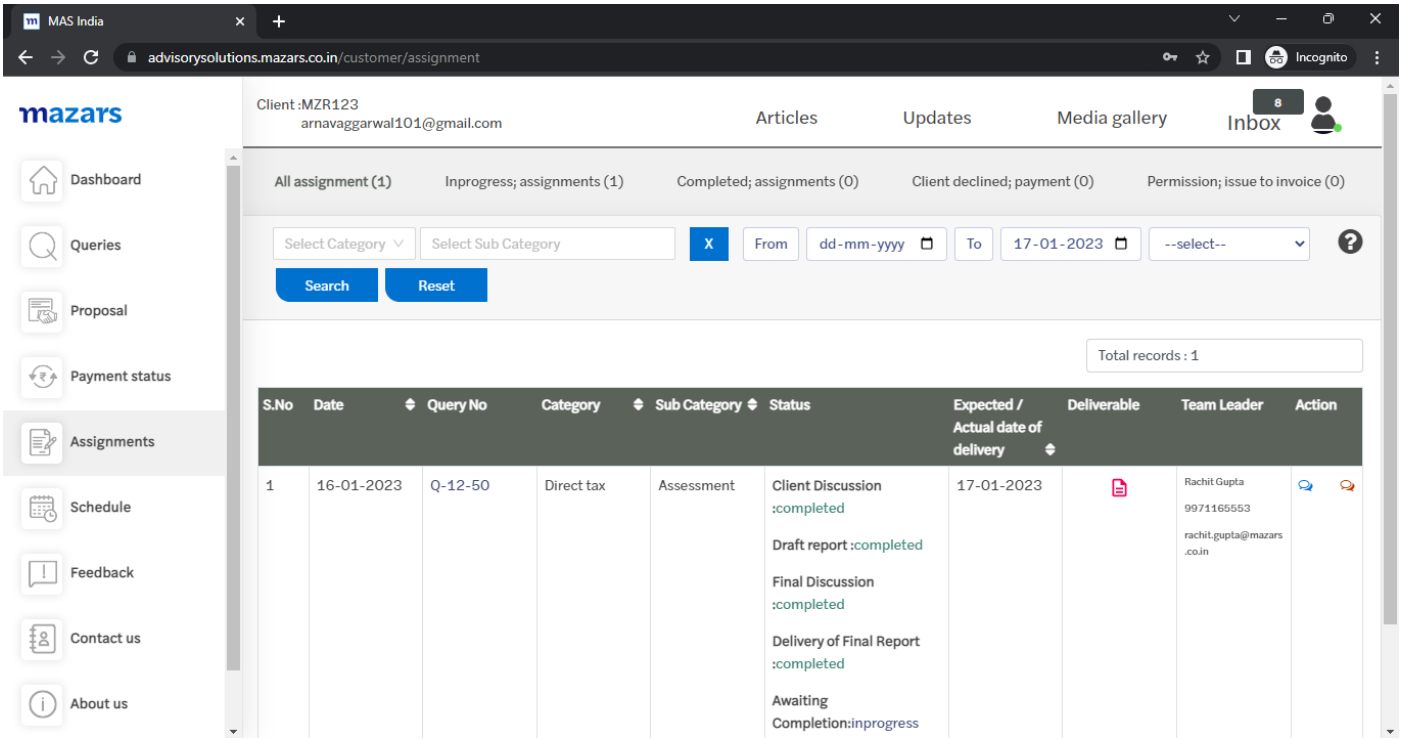
An email alert will also be sent to the client & all secondary email users confirming uploading of all final reports.



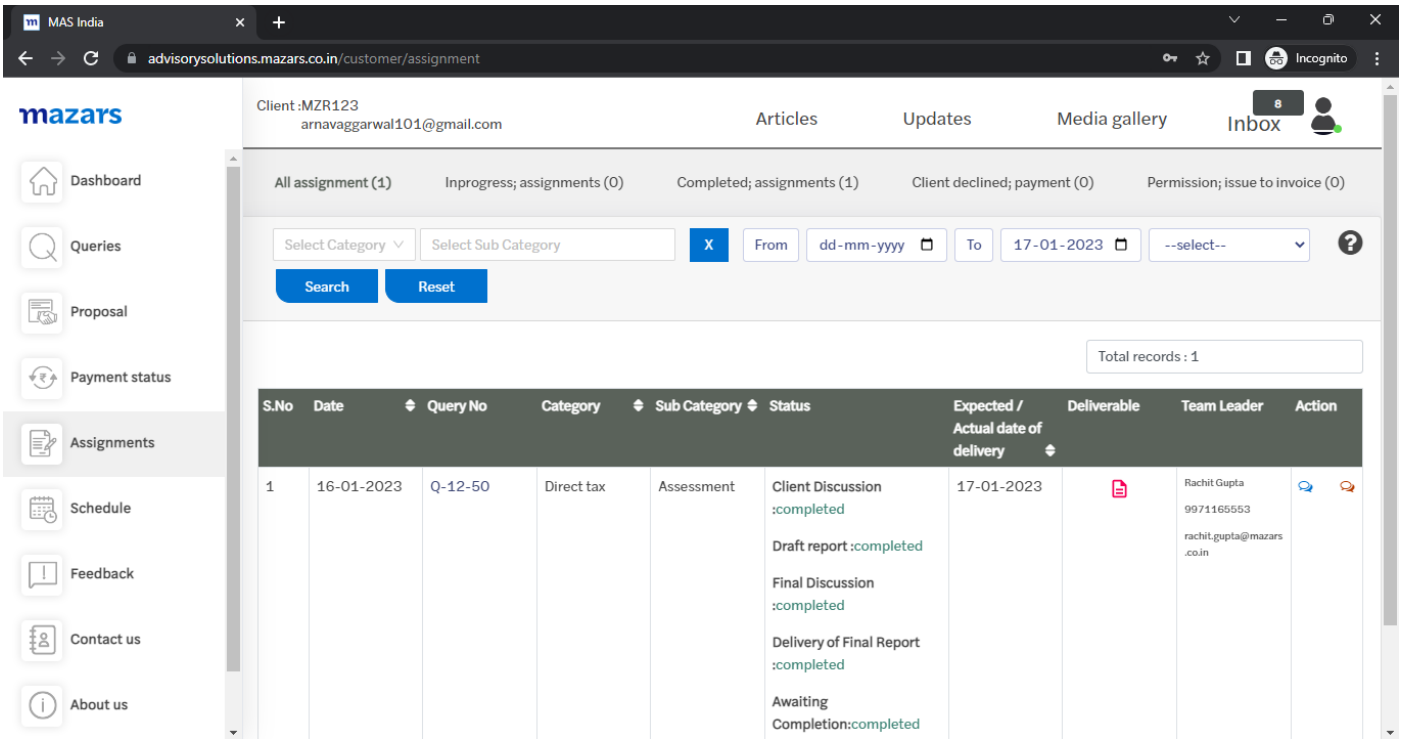
After clicking on following screen will be visible showing final report.



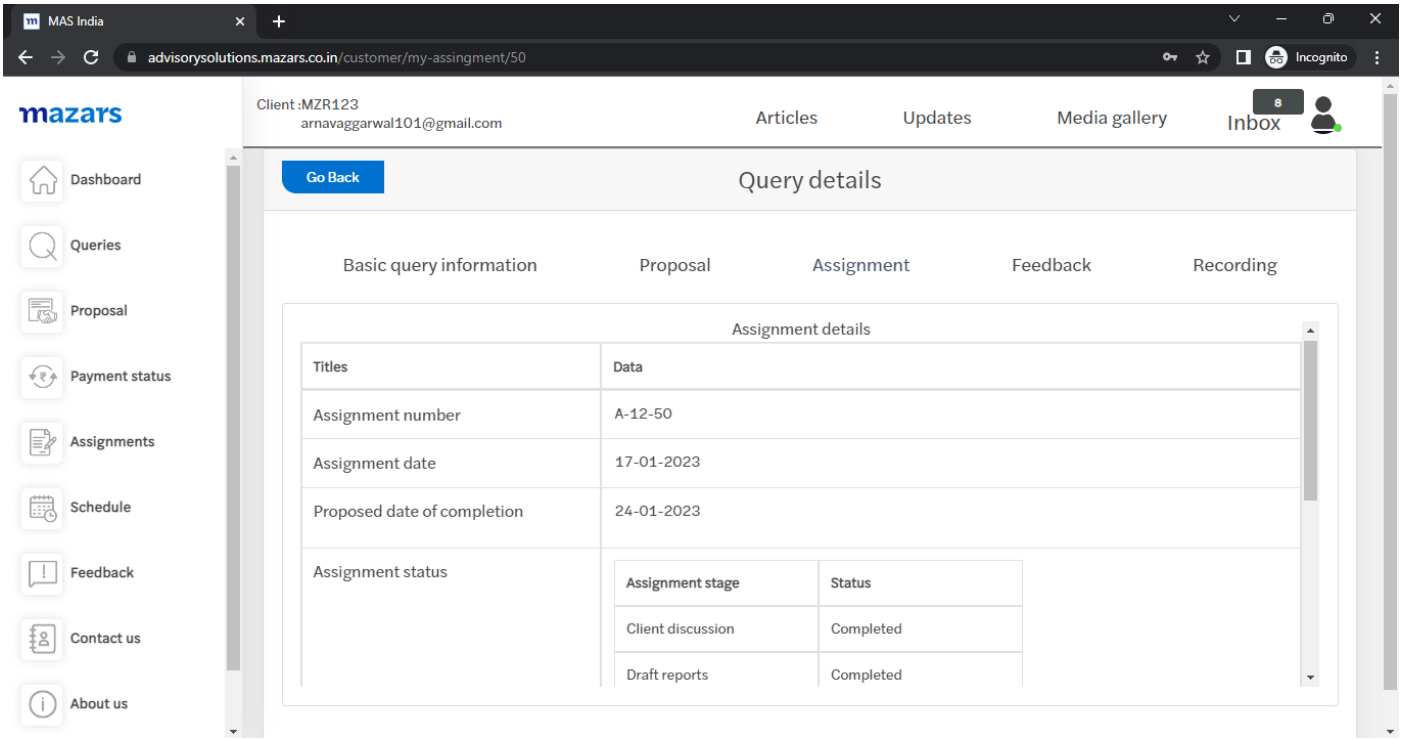
After delivery of final reports, Mazars Advisory Solutions Team will mark the progress status of assignment as delivery of final report completed, below screen will be visible.

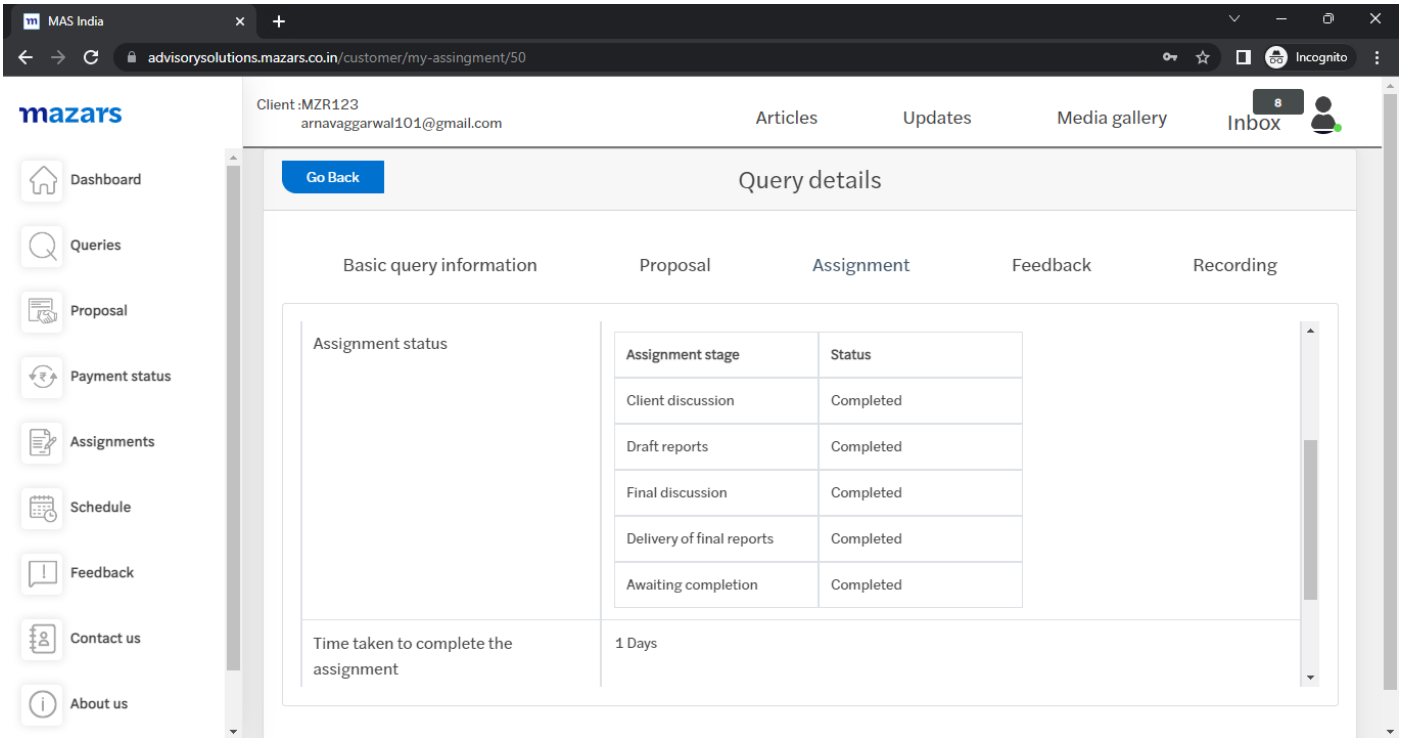


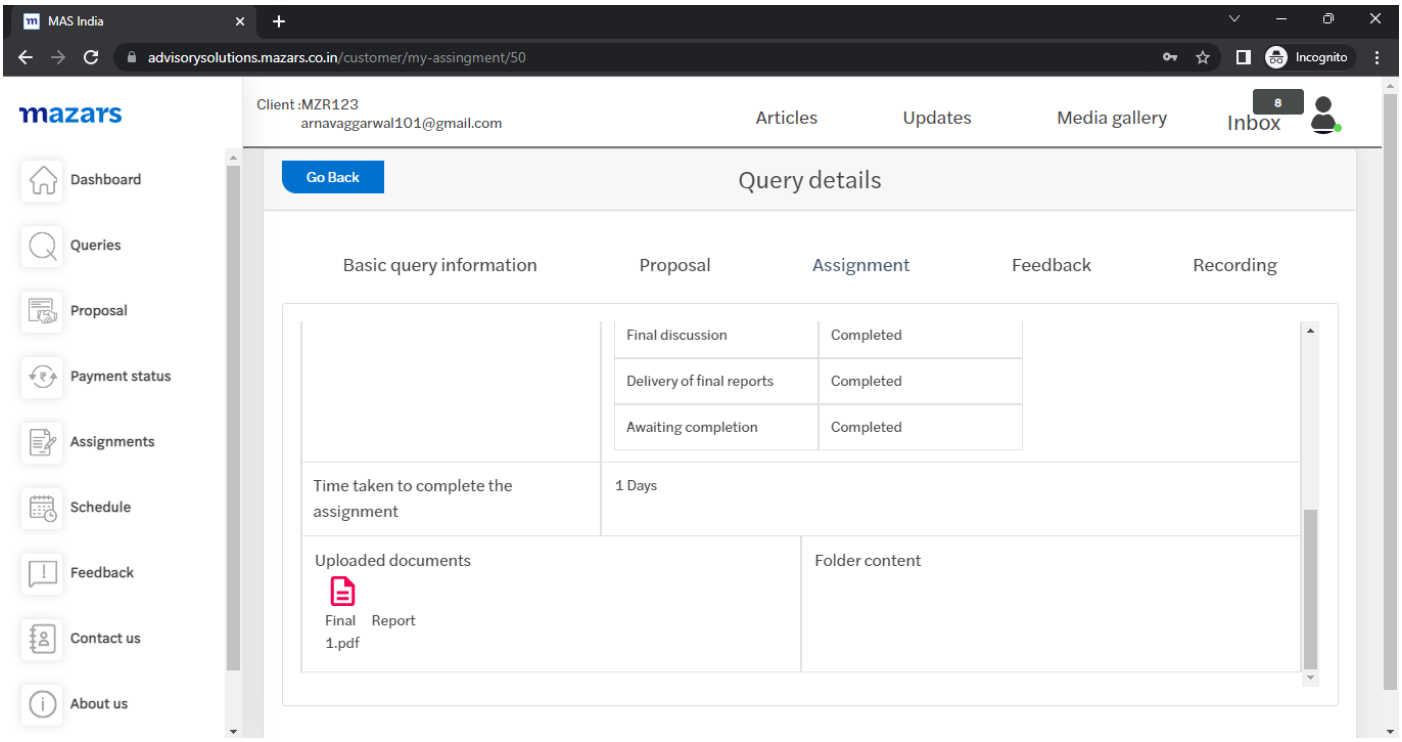
On receipt of full payment from the client, Mazars Advisory Solutions Team will mark awaiting completion as completed & following screen will be visible to the client.



The Assignment tab under the query details will show following information.

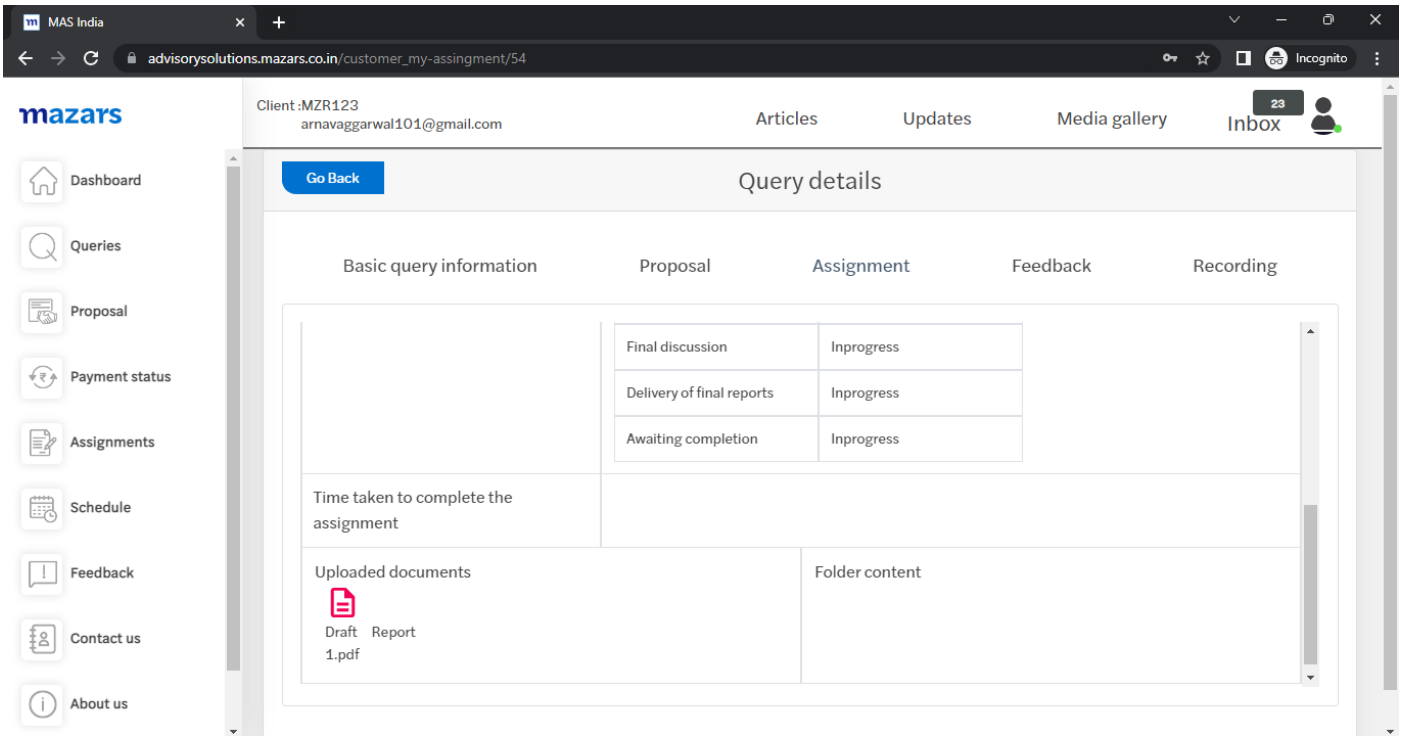
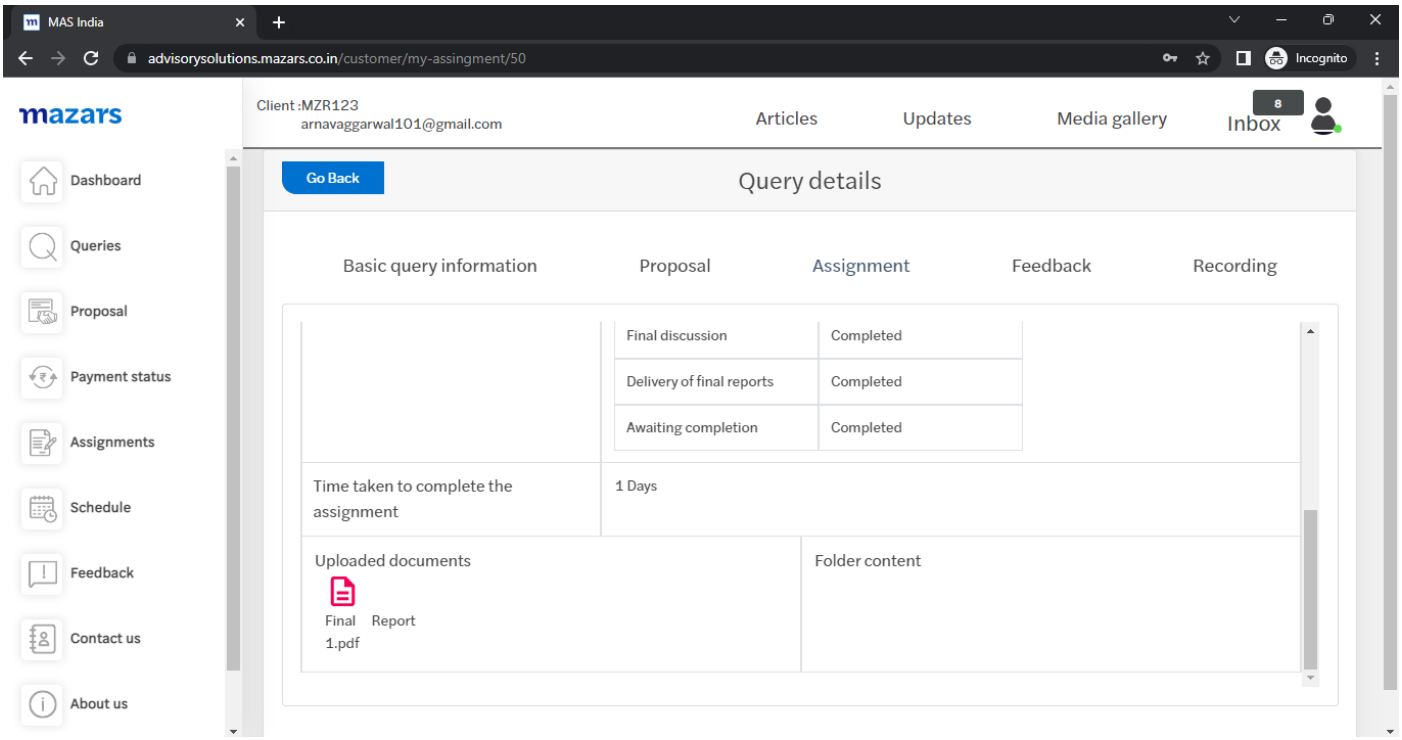



MAS India
advisorysolutions.mazars.co.in/customer/my-assingment/50
Incognito
mazars
Client :MZR123
arnavaggarwal101@gmail.com
Articles
Updates
Media gallery
Inbox
8
Dashboard
Queries
Proposal
Payment status
Assignments
Schedule
Feedback
Contact us
About us
Go Back
Query details
Basic query information
Proposal
Assignment
Feedback
Recording
Assignment status
Assignment stage
Status
Client discussion
Completed
Draft reports
Completed
Final discussion
Completed
Delivery of final reports
Completed
Awaiting completion
Completed
Time taken to complete the assignment
1 Days


MAS India
advisorysolutions.mazars.co.in/customer/my-assingment/50
Incognito
mazars
Client :MZR123
arnavaggarwal101@gmail.com
Articles
Updates
Media gallery
Inbox
8
Dashboard
Queries
Proposal
Payment status
Assignments
Schedule
Feedback
Contact us
About us
Go Back
Query details
Basic query information
Proposal
Assignment
Feedback
Recording
Final discussion
Completed
Delivery of final reports
Completed
Awaiting completion
Completed
Time taken to complete the assignment
1 Days
Uploaded documents
Final Report 1.pdf
Folder content

Query Detail Page: Assignment

Assignment Number	• Shows the unique assignment number allotted to the query.
Assignment date	• Shows the date on which the assignment has been created, i.e., date of acceptance of proposal.
Proposed date of completion	• Shows the expected date of completion of assignment.
Assignment Status	• Shows different stages of progress of the assignment.
Time taken to complete the assignment	• Shows the number of days taken to complete the assignment.

Note: TL name column displays the name of Team Leader, with his contact details.

The client can view the draft reports and/ or final reports at any time, as organized by the Mazars Advisory Solutions Team in the query details under the tab assignment. If selected, following screen will be visible.