

Processing of Proposal:

MAS Team, after examining the query, will prepare a proposal & provide it to the client. An email will also be sent to the client along with the proposal. Such email will also be sent to the selected secondary email users along with copy of proposal.

By selecting the Proposal Tab, on the left-hand side of the following screen, the client can view the proposal, by clicking on the blue arrow facing rightwards (➡). All following actions for acceptance/rejection of proposal can be taken by any of the secondary email users along with the client.

The screenshot displays the MAS India web application interface. The browser address bar shows the URL `masindia.live/#/customer/proposal`. The left sidebar contains navigation links: Dashboard, Queries, Proposal (highlighted), Payment Status, Assignments, Schedule, Feedback, Contact Us, and About Us. The main content area shows the client information: **Client : MAZ123 : arnavaggarwal101@gmail.com**. Below this, there are filters for **All Proposals (1)**, including Inprogress; Proposals (1), Accepted; Proposals (0), and Declined; Proposals (0). A search bar with dropdowns for Category and Sub Category, and date pickers for From and To, is present. A **Search** button and a **Reset** button are also visible. The table below shows the proposal details:

S.No	Date	Query No	Category	Sub Category	Date of Proposal	Date of acceptance / decline of Proposal	Status	Proposed Amount	Accepted Amount	Action
1	18-07-2022	Q-12-44	Direct tax	Assessment	18-07-2022		Inprogress/ Acceptance	1,00,000	0	➡

Total Records : 1

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After clicking on blue arrow facing rightwards (➡), following window will appear:

MAS India

masindia.live/#/customer/proposal_view/44

mazars

Client : MAZ123 : arnavaggarwal101@gmail.com

Inbox 4

Go Back

Proposal Details

Name of Team Leader	TL-01-Rachit Gupta		
Date of Allocation	18-07-2022		
Proposed Amount	1,00,000		
Scope of Work	GST & TP Study		
Amount	Amount Type	Price	
	Fixed	1,00,000	
Payment Terms	Payment Type	No of Installments	Installment Amount
	Installment	4	25,000
			Due Dates
			22-07-2022

☐ Please read engagement letter

Accept Reject

MAS India

masindia.live/#/customer/proposal_view/44

mazars

Client : MAZ123 : arnavaggarwal101@gmail.com

Inbox 4

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Proposal Details

Amount	Amount Type	Price	
	Fixed	1,00,000	
Payment Terms	Payment Type	No of Installments	Installment Amount
	Installment	4	25,000
			Due Dates
			22-07-2022
			30,000
			25-07-2022
			35,000
			04-08-2022
			10,000
			07-08-2022

Proposal Status

Inprogress

☐ Please read engagement letter

Accept Reject

Engagement letter box should be checked to view the engagement letter before accepting or rejecting the proposal by pressing the **Accept** or **Reject** button respectively. The client can also take no action on the proposal by clicking on **Go Back** button.

Upon checking the engagement letter box, proposed engagement letter will be displayed.

Acceptance of proposal by the client will amount to acceptance of Engagement letter.

Before deciding about the proposal, the client can send message to the MAS Team for any discussion about the proposal and may accept or reject the proposal after such discussion. Conference can also be done by the MAS Team with the client for any discussion. The MAS Team may amend the proposal and submit fresh proposal after such discussion/conference.

Under Proposal Tab, various action buttons will appear as per the screen below:




Client : MAZ123 : arnavaggarwal101@gmail.com

All Proposals (1) Inprogress; Proposals (1) Accepted; Proposals (0) Declined; Proposals (0)

Select Category Select Sub Category X From dd-mm-yyyy To 18-07-2022 ?

--select-- Search Reset

Total Records : 1

S.No	Date	Query No	Category	Sub Category	Date of Proposal	Date of acceptance / decline of Proposal	Status	Proposed Amount	Accepted Amount	Action
1	18-07-2022	Q-12-44	Direct tax	Assessment	18-07-2022		Inprogress/Acceptance	1,00,000	0	  

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MAS India

masindia.live/#/customer/proposal

Client : MAZ123 : arnavaggarwal101@gmail.com





Inbox

All Proposals (1) Inprogress; Proposals (0) Accepted; Proposals (1) Declined; Proposals (0)

Select Category Select Sub Category X From dd-mm-yyyy To 18-07-2022 ?

--select-- Search Reset

Total Records : 1

S.No	Date	Query No	Category	Sub Category	Date of Proposal	Date of acceptance / decline of Proposal	Status	Proposed Amount	Accepted Amount	Action
1	18-07-2022	Q-12-44	Direct tax	Assessment	18-07-2022	18-07-2022	Accepted; Proposal	1,00,000	1,00,000	   

Dashboard

Queries

Proposal

Payment Status





Assignments

Schedule

Feedback

Contact Us

About Us

	<ul style="list-style-type: none"> By clicking on this icon, the client can send message to the MAS Team regarding any query.
	<ul style="list-style-type: none"> By clicking in this icon, the client can view the messages history with the MAS Team.
	<ul style="list-style-type: none"> By clicking on this icon, the client can view proposal and its details.
	<ul style="list-style-type: none"> By clicking on this icon, the client can view the Engagement letter.

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Status	Interpretation	Screenshot listing
In-progress; Preparation	MAS Team is preparing the proposal	At S.No. 1
In-progress; Acceptance	MAS Team has sent the proposal to the client which is awaiting acceptance.	At S.No.2
Declined; Proposal	Client has rejected the Proposal	At S.No.3
Accepted; Proposal	Client has accepted the proposal.	At S.No.4

Dashboard

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Client : MAZ123 : arnavaggarwal101@gmail.com

All Proposals (4)

Inprogress; Proposals (2)

Accepted; Proposals (1)

Declined; Proposals (1)

Select Category

Select Sub Category

X

From

dd-mm-yyyy

To

19-07-2022

?

--select--

Search

Reset

Total Records : 4

S.No	Date	Query No	Category	Sub Category	Date of Proposal	Date of acceptance / decline of Proposal	Status	Proposed Amount	Accepted Amount	Action
1	19-07-2022	Q-22-49	Indirect tax	Assessment			Inprogress/ Preparation	0	0	
2	19-07-2022	Q-22-48	Indirect tax	Assessment	19-07-2022		Inprogress/ Acceptance	100	0	
3	19-07-2022	Q-11-47	Direct tax	Compliance	19-07-2022	19-07-2022	Declined; Proposal	200	0	
4	19-07-2022	Q-11-46	Direct tax	Compliance	19-07-2022	19-07-2022	Accepted; Proposal	100	100	

Mazars Advisory Solutions (MAS)

By selecting the Engagement Letter checkbox, the proposal can be viewed and on the basis of terms and conditions mentioned in the proposal, the client can make the decision by clicking on **Accept** or **Reject**.

Client : MAZ123 : arnavaggarwal101@gmail.com

Proposal Details

Name of Team Leader	TL-01-Rachit Gupta		
Date of Allocation	18-07-2022		
Proposed Amount	1,00,000		
Scope of Work	GST & TP Study		
Amount	Amount Type	Price	
	Fixed	1,00,000	
Payment Terms	Payment Type	No of Installments	Installment Amount
	Installment	4	25,000
			Due Dates
			22-07-2022

☐ Please read engagement letter

Accept **Reject**

If the proposal is acceptable, click **Accept** button. Upon acceptance, following success message window will appear showing success message window, click ok.

Client : MAZ123 : arnavaggarwal101@gmail.com

All Proposals (1) Inprogress; Proposals (0) Accepted; Proposals (1) Declined; Proposals (0)

Select Category Select Sub Category X From dd-mm-yyyy To 19-07-2022

--select--

Total Records : 1

Success

OK

S.No	Date	Query	Status	Proposed Amount	Accepted Amount	Action
1	19-07-2022	Q-11-46	Accepted, Proposal	100	100	

Mazars Advisory Solutions (MAS)

After acceptance of proposal, action button right arrow (➡) will disappear & new eye button (👁) will appear to view the accepted proposal as below:

Client : MAZ123 : arnavaggarwal101@gmail.com

All Proposals (1) Inprogress; Proposals (0) Accepted; Proposals (1) Declined; Proposals (0)

Select Category Select Sub Category X From dd-mm-yyyy To 18-07-2022 ?

--select-- Search Reset

Total Records : 1

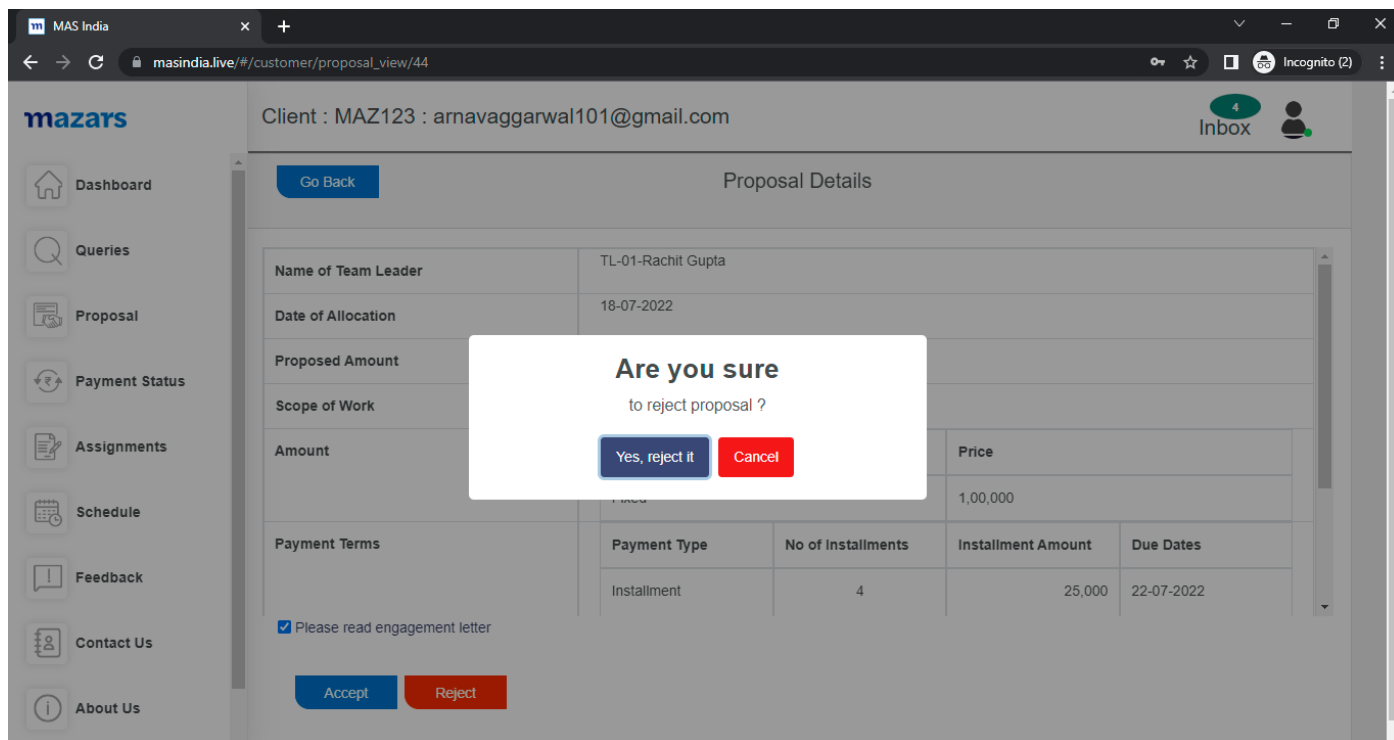
S.No	Date	Query No	Category	Sub Category	Date of Proposal	Date of acceptance / decline of Proposal	Status	Proposed Amount	Accepted Amount	Action
1	18-07-2022	Q-12-44	Direct tax	Assessment	18-07-2022	18-07-2022	Accepted; Proposal	1,00,000	1,00,000	➡ 👁



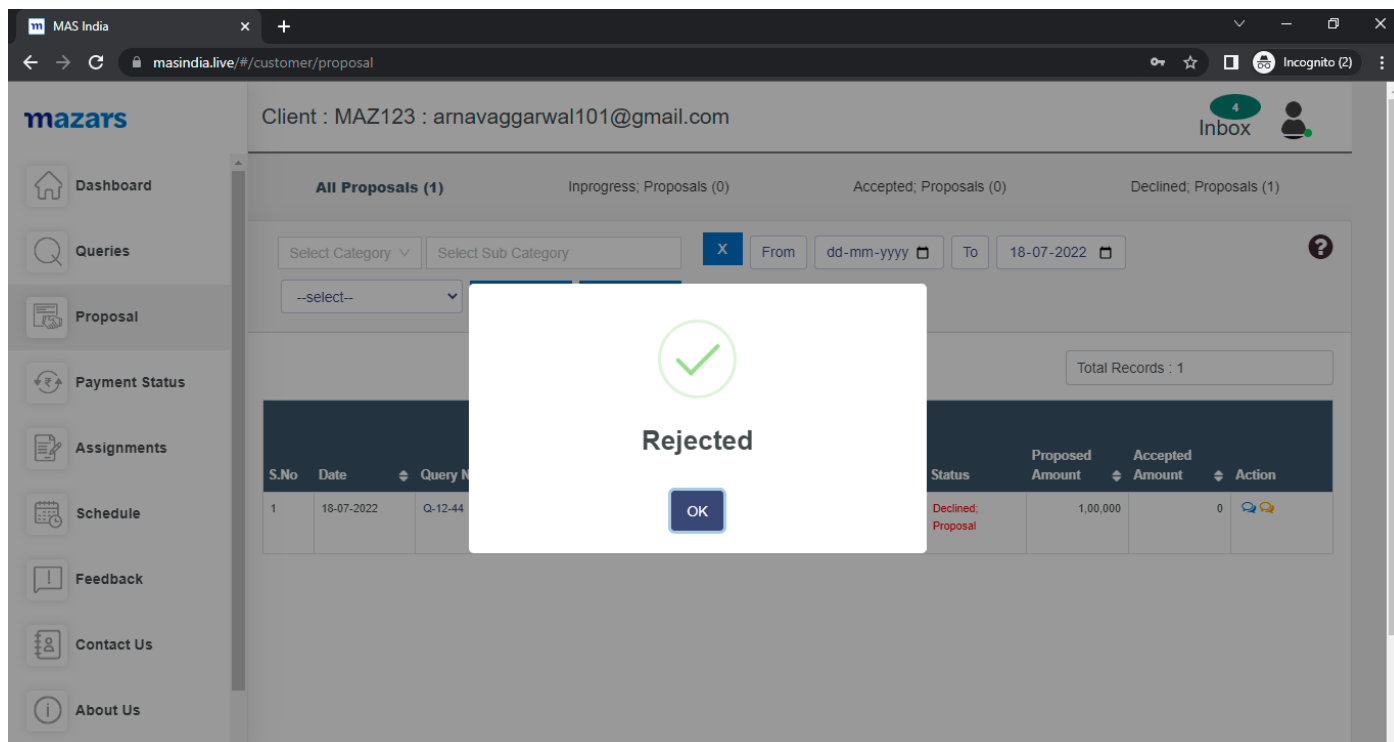
- By clicking on this icon, the client can view the Engagement letter as accepted by him. His acceptance is also recorded on such engagement letter electronically.

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If the proposal is not acceptable, click **Reject** button. Rejection message window will appear showing “Are you sure to reject Proposal?”.



The client can still review the proposal & go back by clicking **Cancel** button. If sure to reject, click **Yes, reject it**. Upon such rejection following message will appear. Click ok.



Upon rejection of proposal, following screen will be visible in the Proposal tab details.

The screenshot shows the MAS India web application interface. The client is MAZ123 : arnavaggarwal101@gmail.com. The 'Proposal' tab is active, showing 'All Proposals (1)'. The status is 'Declined; Proposals (1)'. The search filters show 'From 18-07-2022' to '18-07-2022'. The table displays one record with the status 'Declined; Proposal'.

S.No	Date	Query No	Category	Sub Category	Date of Proposal	Date of acceptance / decline of Proposal	Status	Proposed Amount	Accepted Amount	Action
1	18-07-2022	Q-12-44	Direct tax	Assessment	18-07-2022	18-07-2022	Declined; Proposal	1,00,000	0	

In case of client inadvertently rejecting the proposal, he may send message to the MAS Team for restoring the pending proposal status by clicking on icon.

The screenshot shows the MAS India web application interface. The client is MAZ123 : arnavaggarwal101@gmail.com. The 'Proposal' tab is active, showing 'All Proposals (1)'. The status is 'Declined; Proposals (1)'. The search filters show 'From 18-07-2022' to '18-07-2022'. The table displays one record with the status 'Declined; Proposal' and a message icon in the Action column.

S.No	Date	Query No	Category	Sub Category	Date of Proposal	Date of acceptance / decline of Proposal	Status	Proposed Amount	Accepted Amount	Action
1	18-07-2022	Q-12-44	Direct tax	Assessment	18-07-2022	18-07-2022	Declined; Proposal	1,00,000	0	

After examining the request, MAS Team may quickly restore the pending proposal status & it will be visible to the client. An email will also be sent to the client.

Client : MAZ123 : arnavaggarwal101@gmail.com

All Proposals (1) Inprogress; Proposals (1) Accepted; Proposals (0) Declined; Proposals (0)

Select Category Select Sub Category X From dd-mm-yyyy To 18-07-2022 ?

--select-- Search Reset

Total Records : 1

S.No	Date	Query No	Category	Sub Category	Date of Proposal	Date of acceptance / decline of Proposal	Status	Proposed Amount	Accepted Amount	Action
1	18-07-2022	Q-12-44	Direct tax	Assessment	18-07-2022		Inprogress/Acceptance	1,00,000	0	Download

After the acceptance of Proposal, Proposal tab under the Query Details will show the following information. The client can also download the proposal by clicking download button [Download](#)

Client : MAZ123 : arnavaggarwal101@gmail.com

[Go Back](#) Query Details

Basic Query Information Proposal Assignment Feedback

Proposal and Payment Details

Titles	Data				
Date of Allocation	18-07-2022				
Name of Team Leader	TL-01-Rachit Gupta				
Name of Tax Professional(s)					
Date of Proposal	18-07-2022 Download				
Scope of Work	GST & TP Study				
Amount	<table border="1"> <thead> <tr> <th>Amount Type</th> <th>Price</th> </tr> </thead> <tbody> <tr> <td>Fixed</td> <td>1,00,000</td> </tr> </tbody> </table>	Amount Type	Price	Fixed	1,00,000
Amount Type	Price				
Fixed	1,00,000				

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MAS India

masindia.live/#/customer/my-assignment/44

Client : MAZ123 : arnavaggarwal101@gmail.com

Inbox 5

mazars

- Dashboard
- Queries
- Proposal
- Payment Status
- Assignments
- Schedule
- Feedback
- Contact Us
- About Us
- Help

Query Details

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Basic Query Information Proposal Assignment Feedback

Payment Terms	Payment Type	No of Installments	Installment Amount	Due Dates
	Installment	4	25,000	22-07-2022
			30,000	25-07-2022
			35,000	04-08-2022
			10,000	07-08-2022
Proposed Amount	1,00,000			
Proposal Status	Accepted			
Amount Accepted	1,00,000			
Date of Acceptance / Decline	18-07-2022			

MAS India

masindia.live/#/customer/my-assignment/44

Client : MAZ123 : arnavaggarwal101@gmail.com

Inbox 5

mazars

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Query Details

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Basic Query Information Proposal Assignment Feedback

Amount Accepted	1,00,000				
Date of Acceptance / Decline	18-07-2022				
Payment History	Date	Invoice Amount	Tds Deducted	Amount Paid	Payment Receipt
Payment Received	0				
Payment Overdue					
Payment Outstanding	1,00,000				
Reasons for proposal Decline	na				
Date of restoring proposal	18-07-2022				
Reason of restoring proposal	Proposal restored				

Query Detail Page: Proposal

Date of allocation	<ul style="list-style-type: none"> Date of allocation of the query to a Team Leader.
Name of Team Leader	<ul style="list-style-type: none"> Shows the Designation & Name of the Team Leader.
Date of Proposal	<ul style="list-style-type: none"> Date of online sending of proposal to the client by MAS Team.
Scope of Work	<ul style="list-style-type: none"> Scope of work arising from the query.
Amount	<ul style="list-style-type: none"> Payment terms maybe fixed or monthly recurring payments.
Payment Terms	<ul style="list-style-type: none"> Shows the payment terms, instalment(s) amount(s) & their due dates, if any.
Proposed Amount	<ul style="list-style-type: none"> Amount proposed by the MAS Team for execution of the query.
Proposal Status	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> Amount accepted by the client for execution of the query.
Date of Acceptance / Decline	<ul style="list-style-type: none"> Date of acceptance or decline of the proposal by the client.
Payment History	<ul style="list-style-type: none"> Shows the details of payment made by the client.
Payment Received	<ul style="list-style-type: none"> Shows the total amount paid by the client.
Payment Outstanding	<ul style="list-style-type: none"> Shows the outstanding amount payable by the client.
Payment decline reason	<ul style="list-style-type: none"> 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.
<i>(After accepting the proposal, the client can view progress of the query under the assignment tab)</i>	

