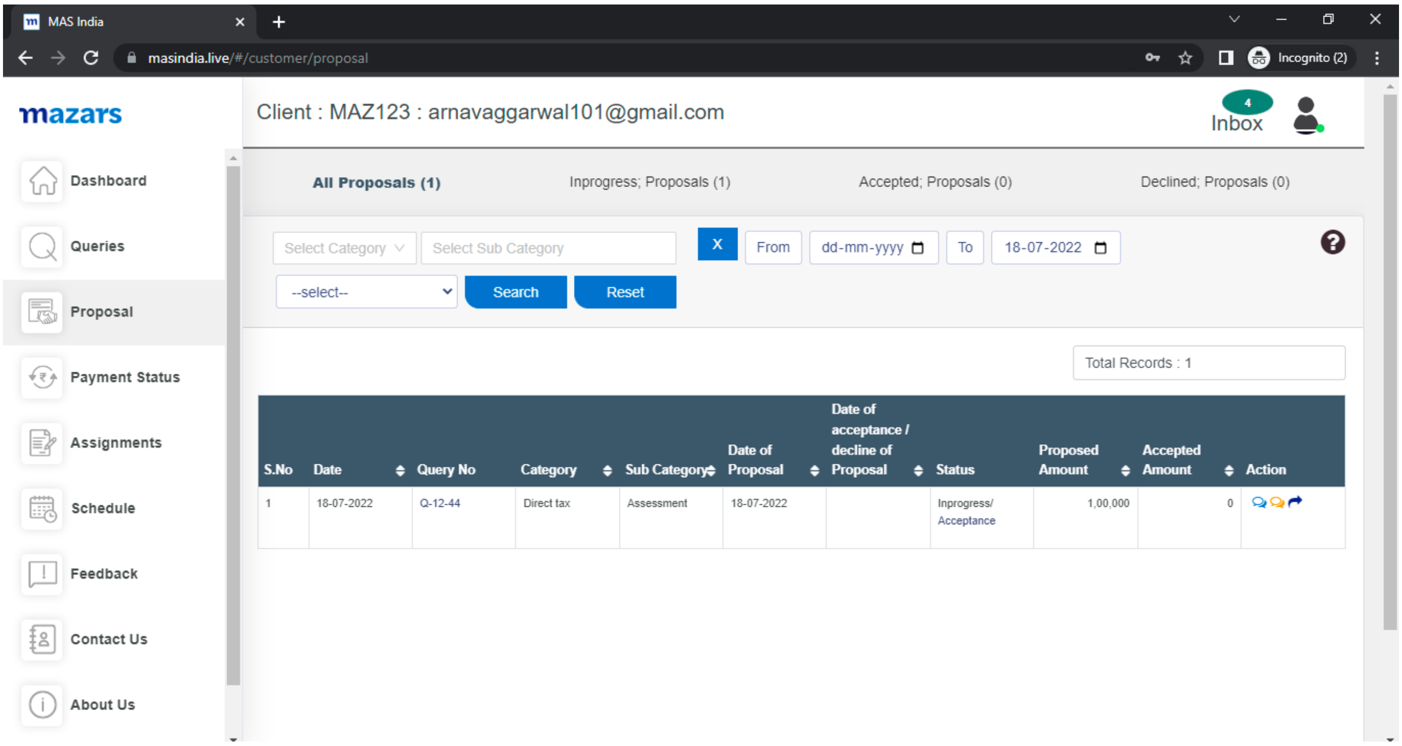
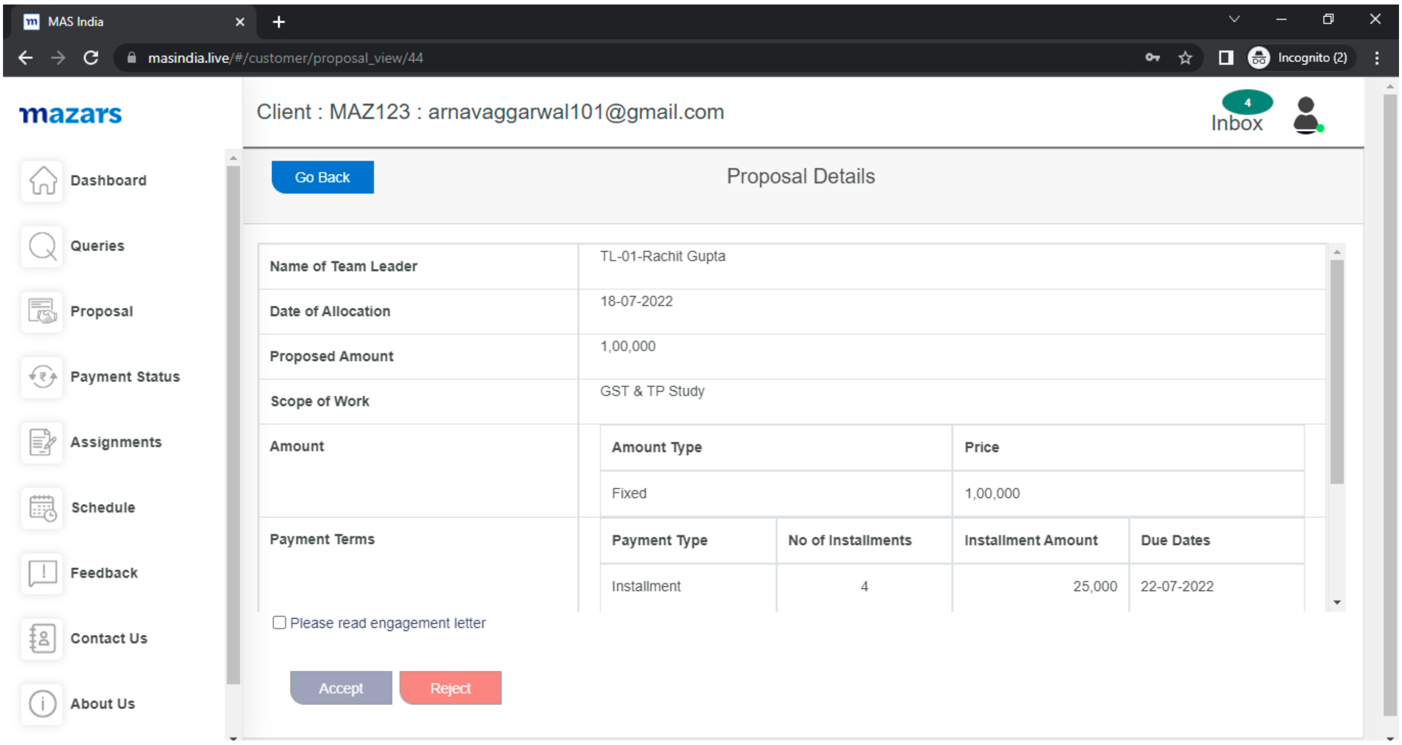
Processing of Proposal:

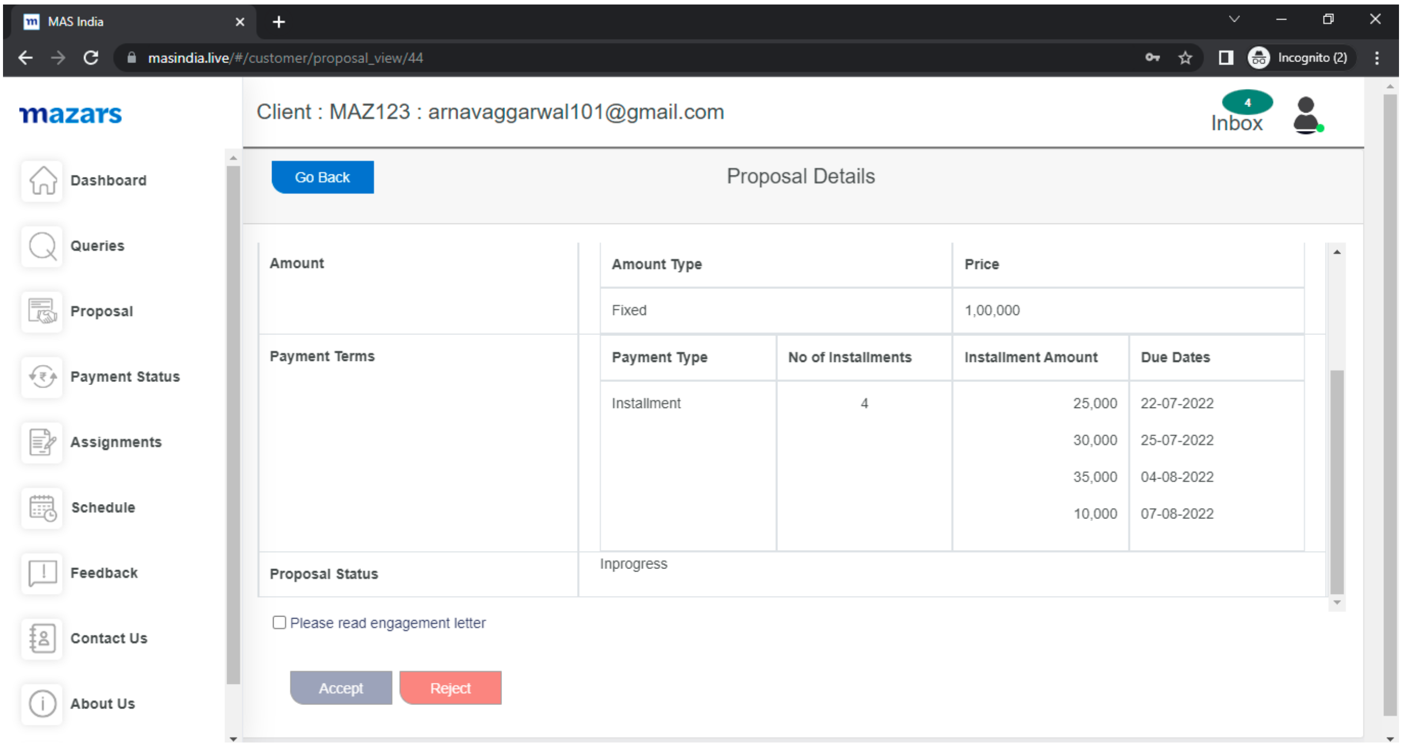
MAS Team, after examining the query, will prepare a proposal & provide it to the client. An email will also be sent to the client along with the proposal. Such email will also be sent to the selected secondary email users along with copy of proposal.

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.



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





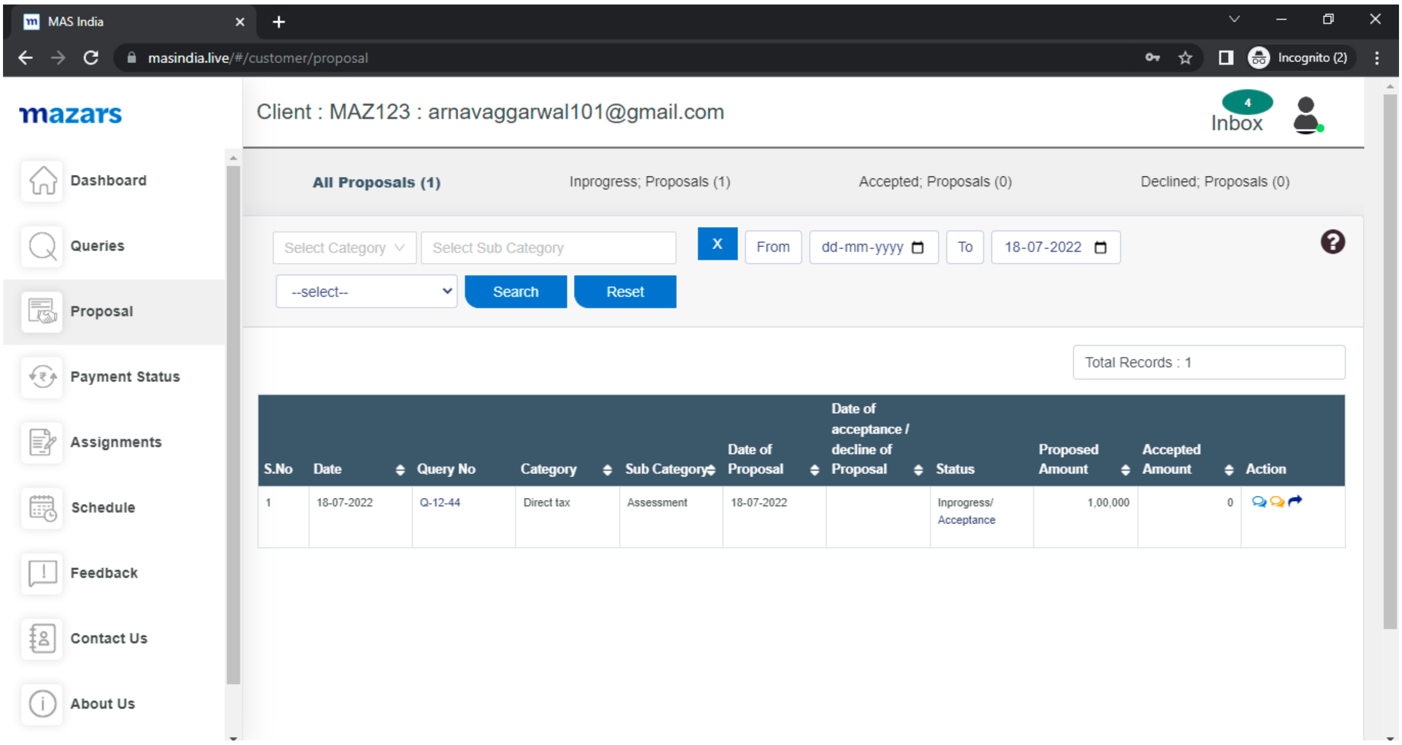
Engagement letter box should be checked to view the engagement letter before accepting or rejecting the proposal by pressing the Accept or Reject button respectively. The client can also take no action on the proposal by clicking on Go Back button.

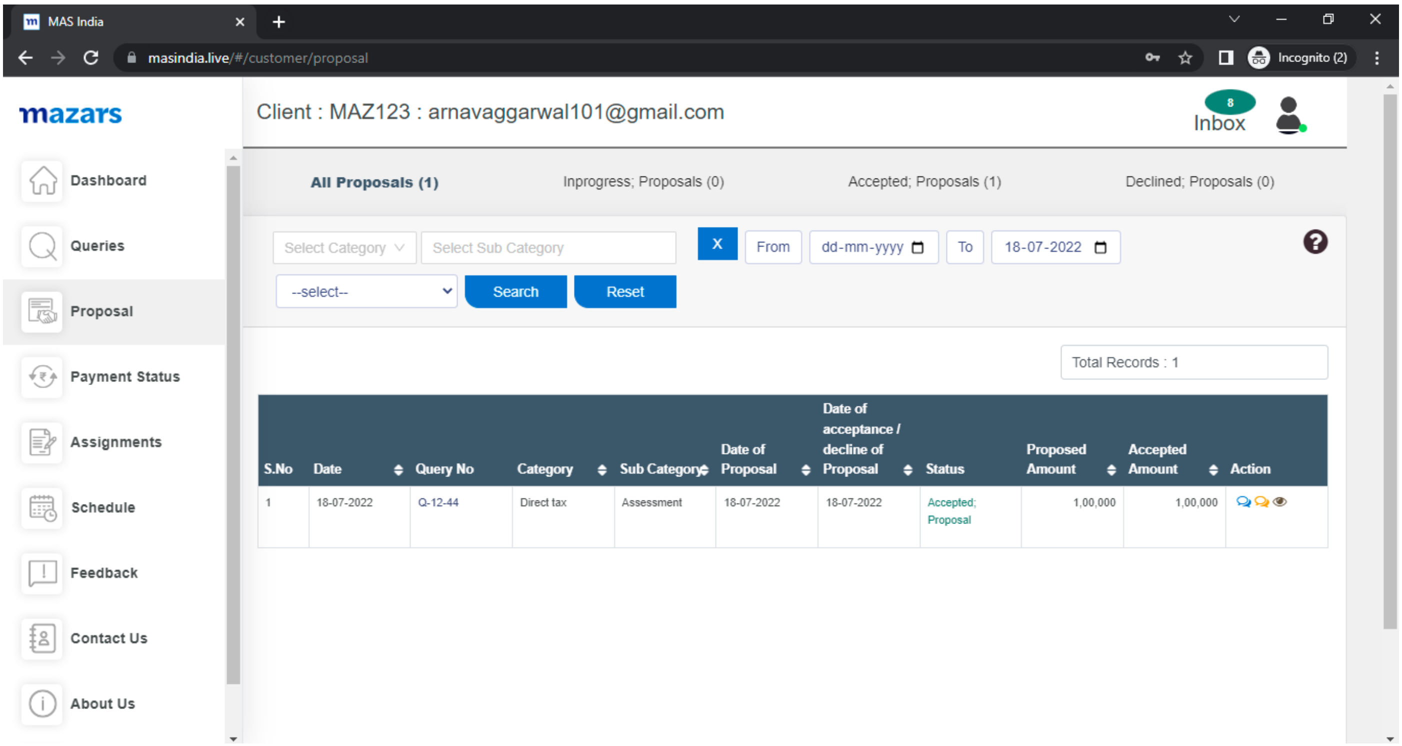
Upon checking the engagement letter box, proposed engagement letter will be displayed.

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:

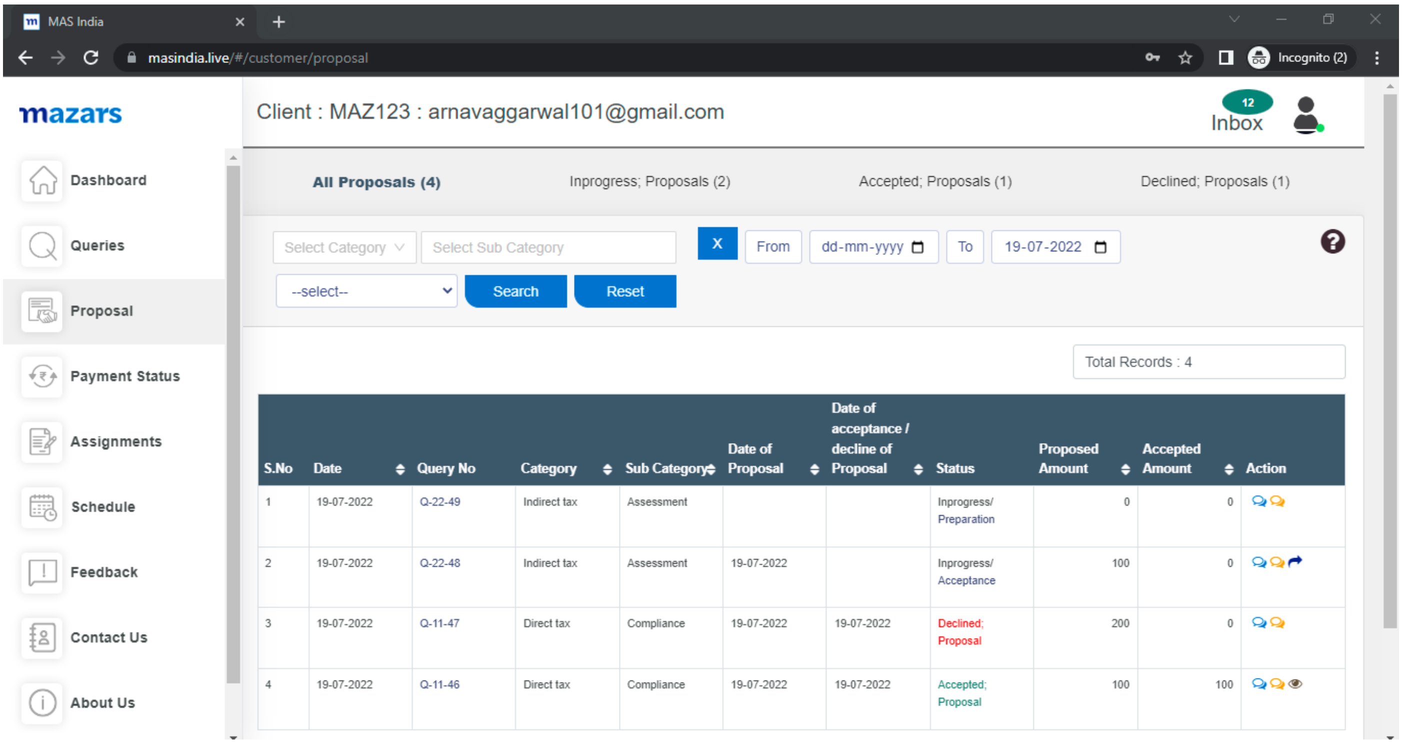




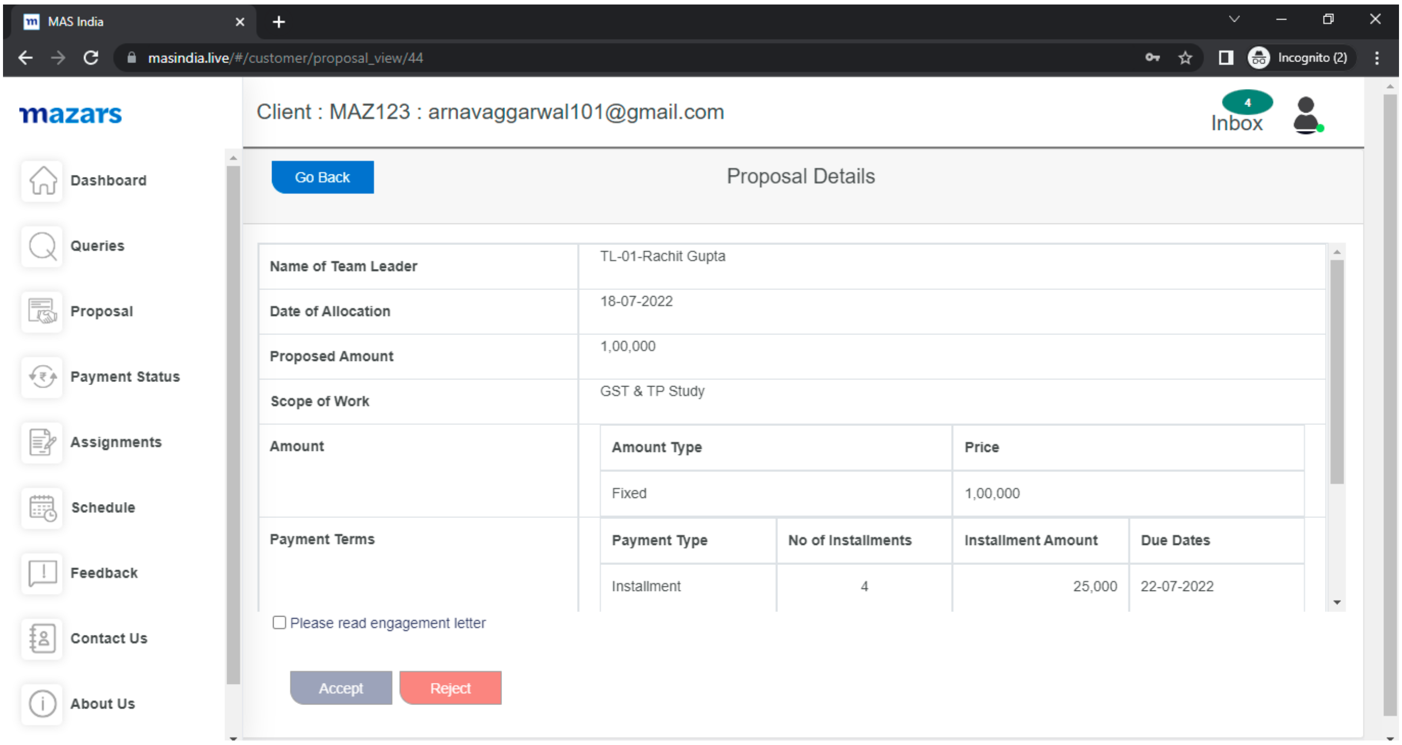
	• By clicking on this icon, the client can send message to the MAS Team regarding any query.
	• By clicking in this icon, the client can view the messages history with the MAS Team.
	• By clicking on this icon, the client can view proposal and its details.
	• By clicking on this icon, the client can view the Engagement letter.

Mazars Advisory Solutions (MAS)

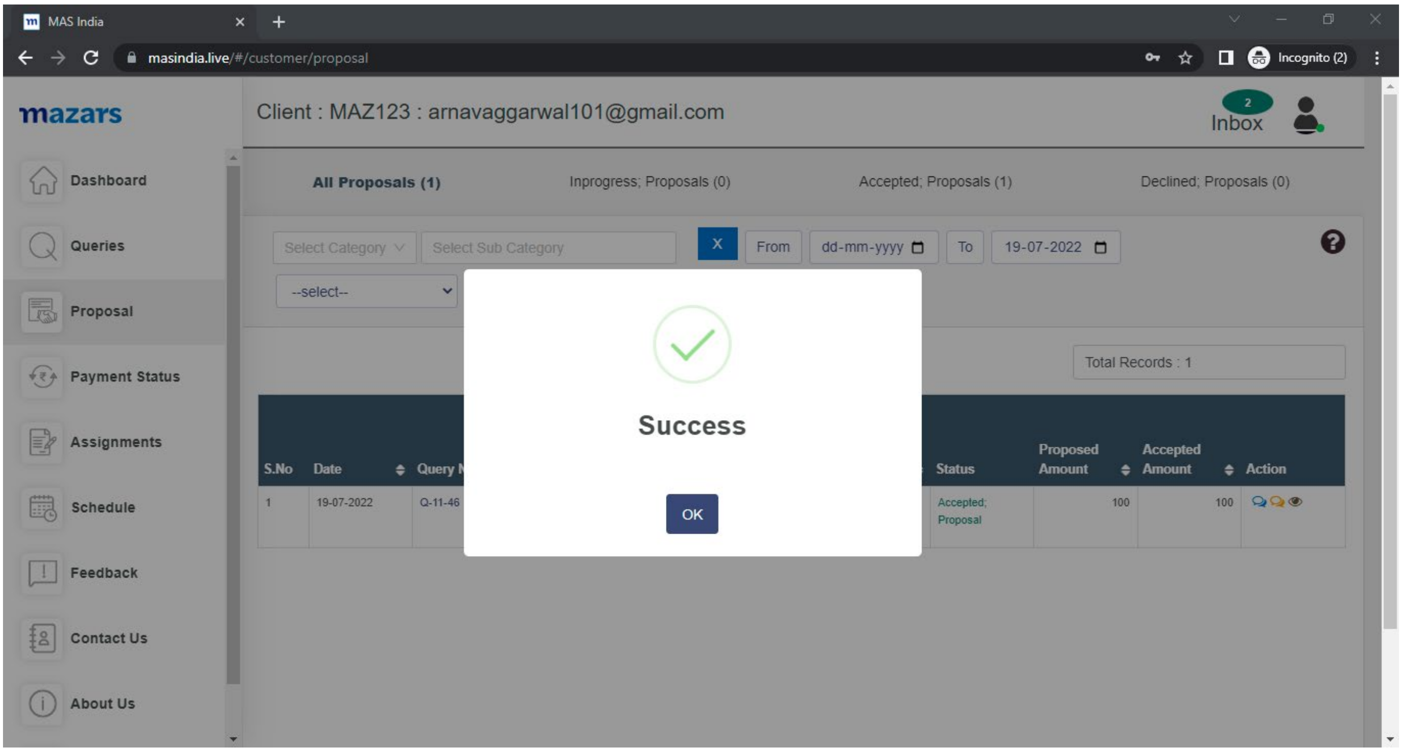
Status	Interpretation	Screenshot listing
In-progress; Preparation	MAS Team is preparing the proposal	At S.No. 1
In-progress; Acceptance	MAS Team has sent the proposal to the client which is awaiting acceptance.	At S.No.2
Declined; Proposal	Client has rejected the Proposal	At S.No.3
Accepted; Proposal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



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.

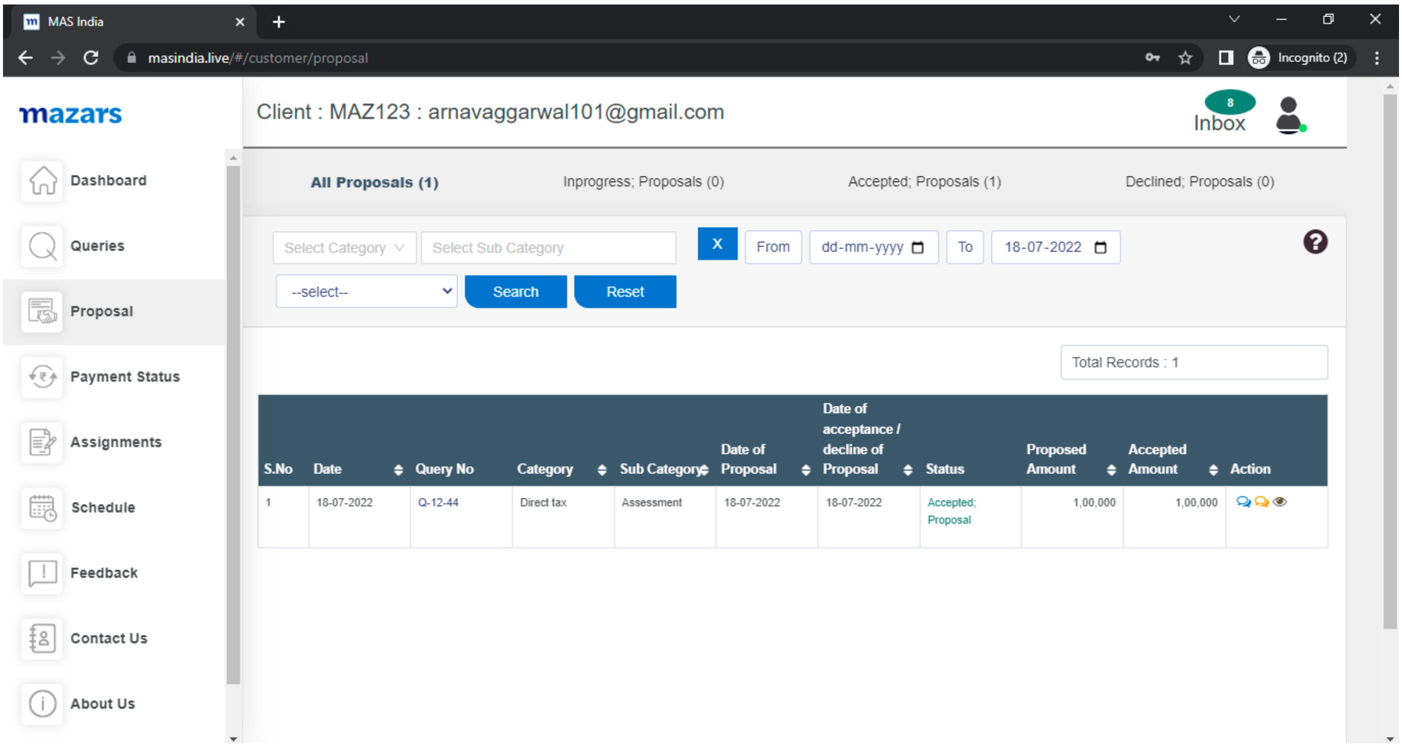


If the proposal is acceptable, click Accept button. Upon acceptance, following success message window will appear showing success message window, click ok.



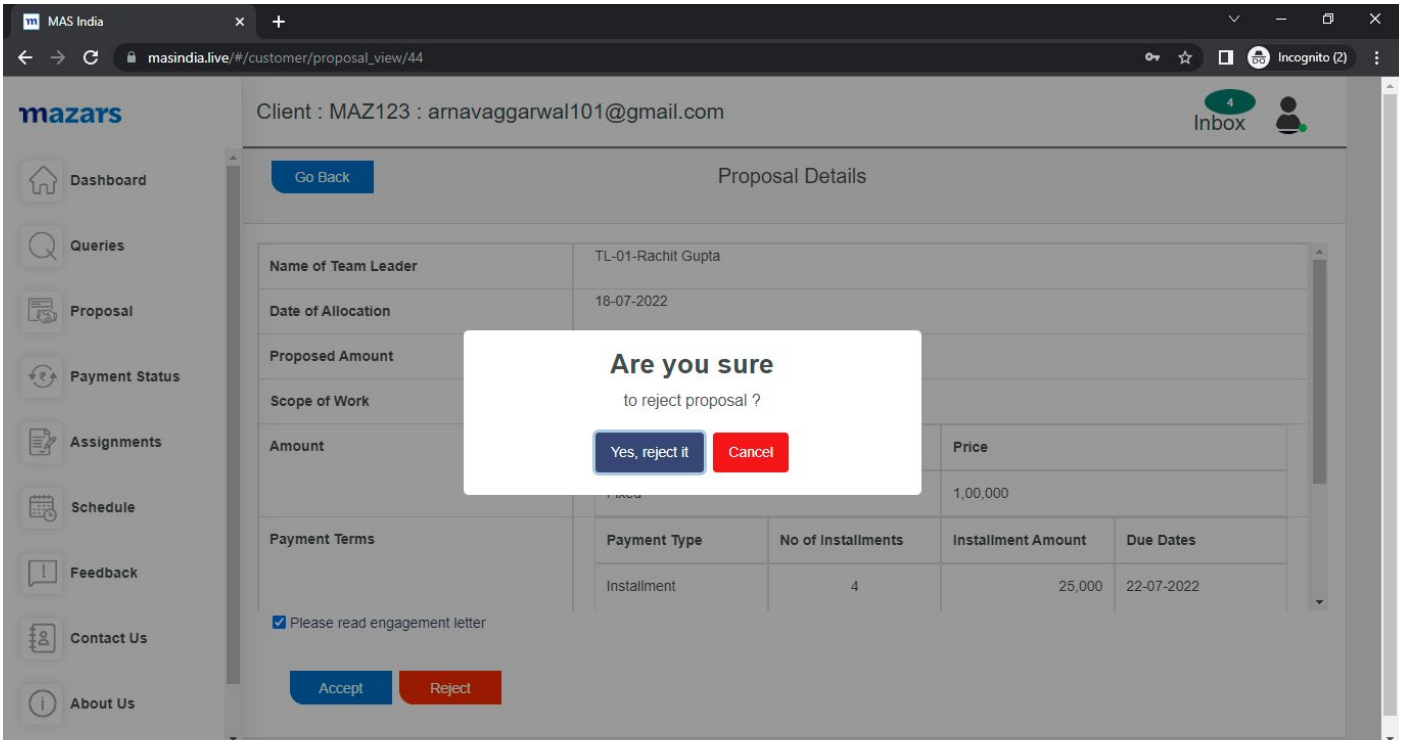
Mazars Advisory Solutions (MAS)

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

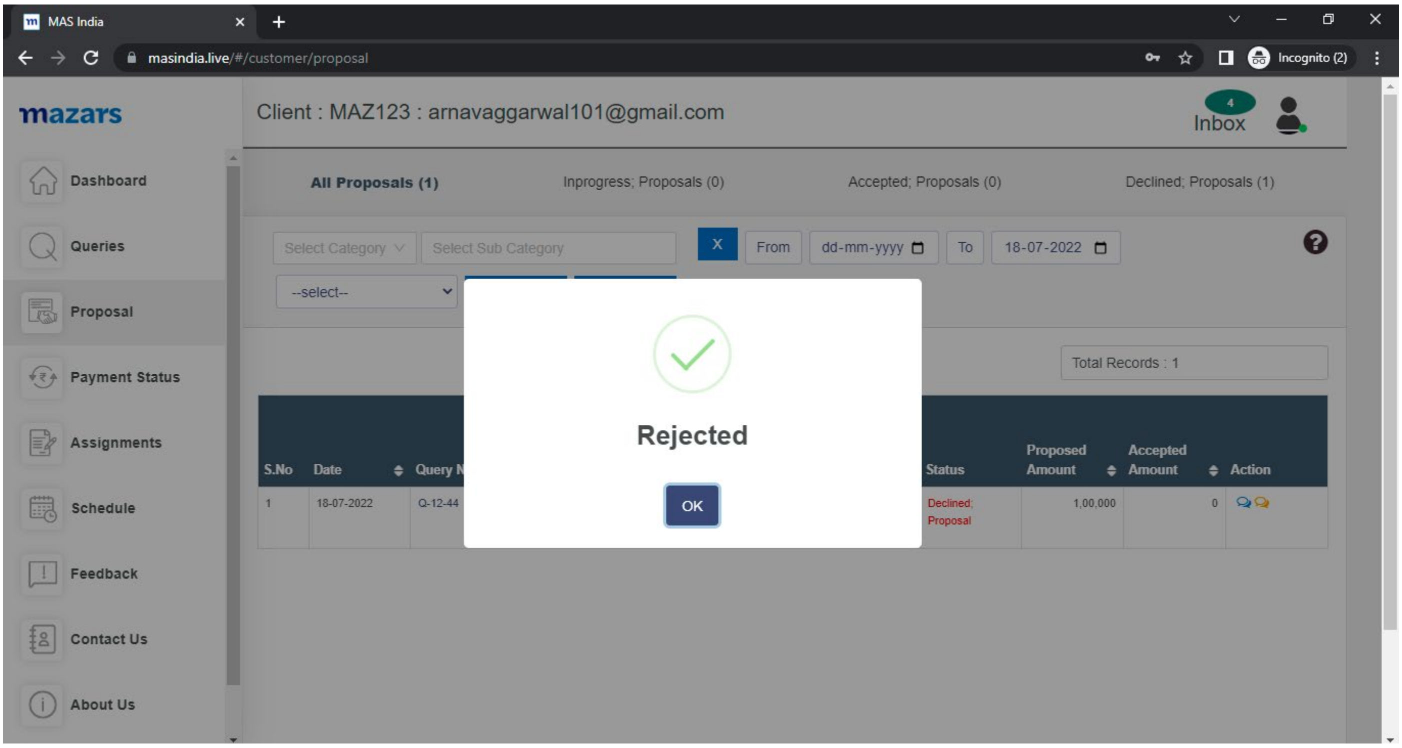


	• By clicking on this icon, the client can view the Engagement letter as accepted by him. His acceptance is also recorded on such engagement letter electronically.

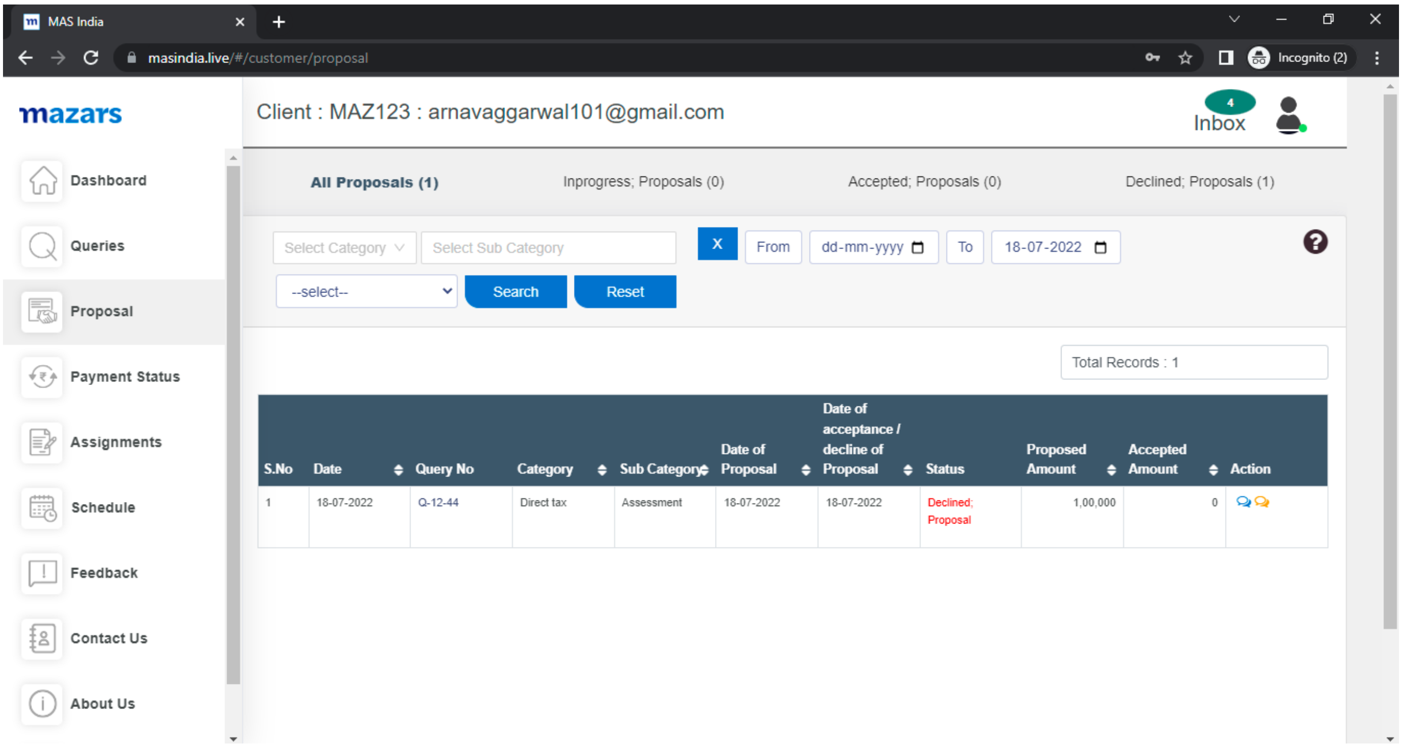
If the proposal is not acceptable, click Reject button. Rejection message window will appear showing "Are you sure to reject Proposal?".



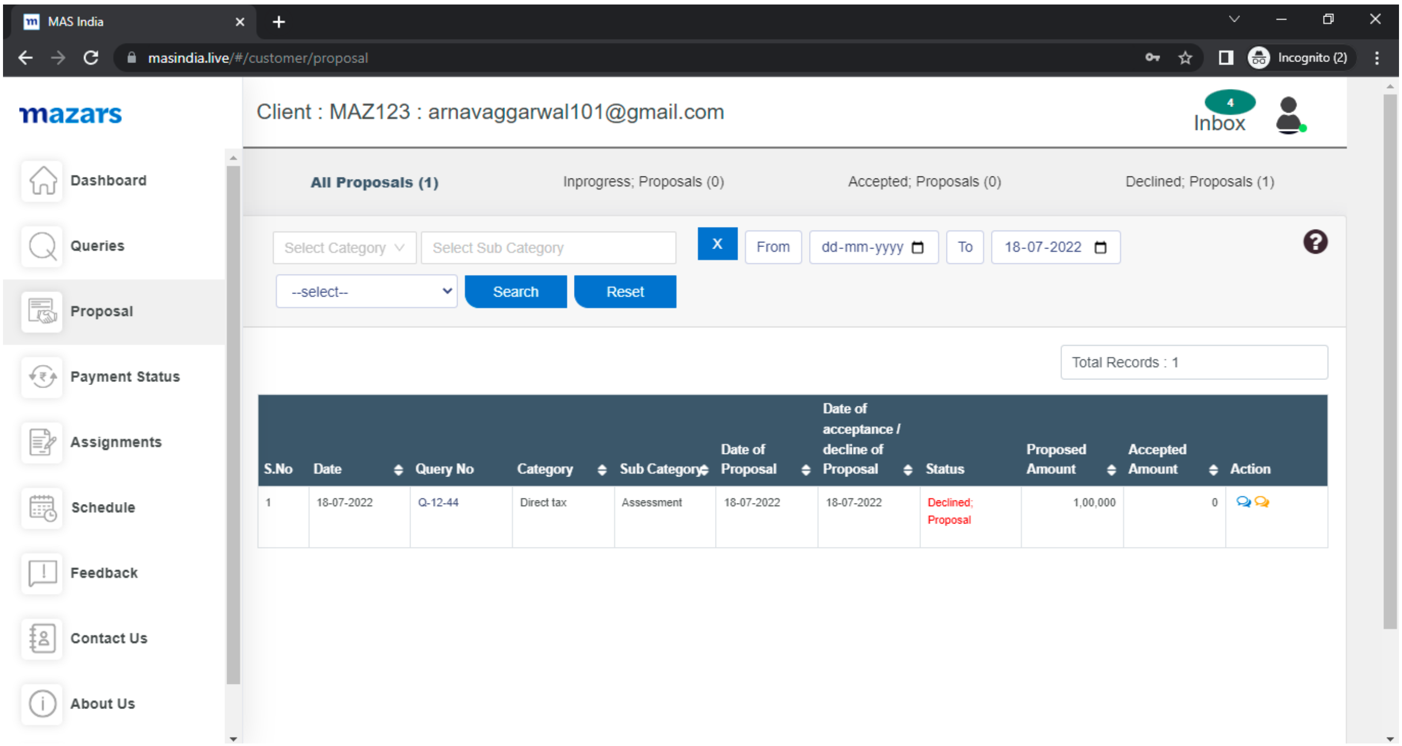
The client can still review the proposal & go back by clicking Cancel button. If sure to reject, click Yes, reject it. Upon such rejection following message will appear. Click ok.



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

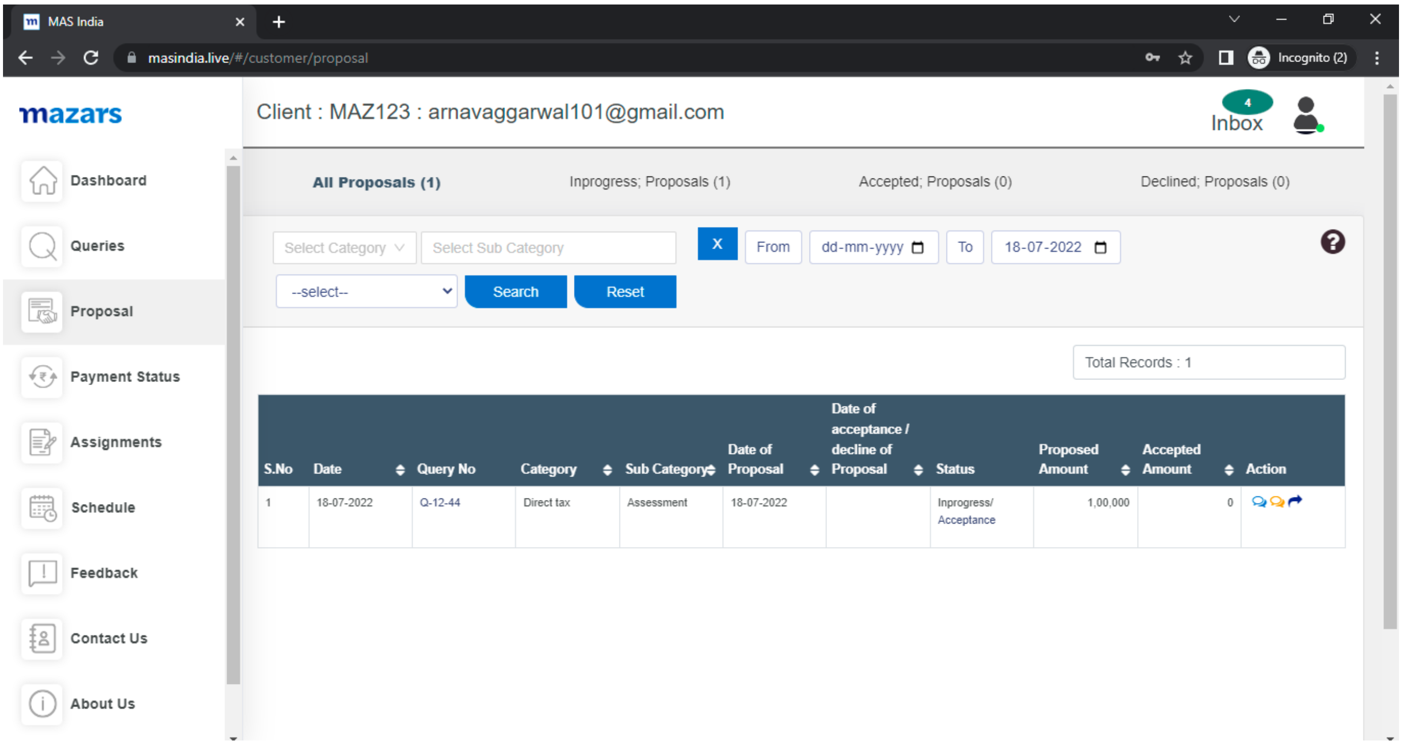


In case of client inadvertently rejecting the proposal, he may send message to the MAS Team for restoring the pending proposal status by clicking on icon.



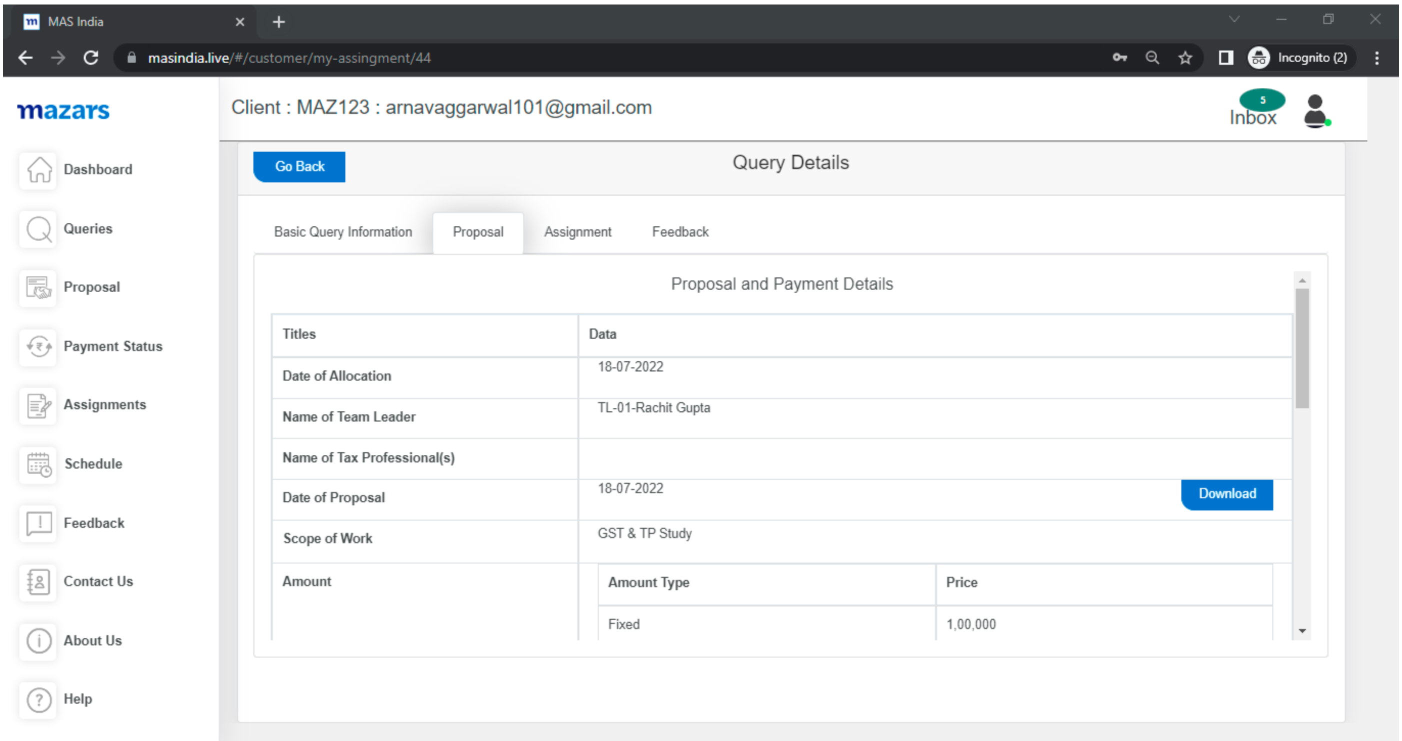
Mazars Advisory Solutions (MAS)

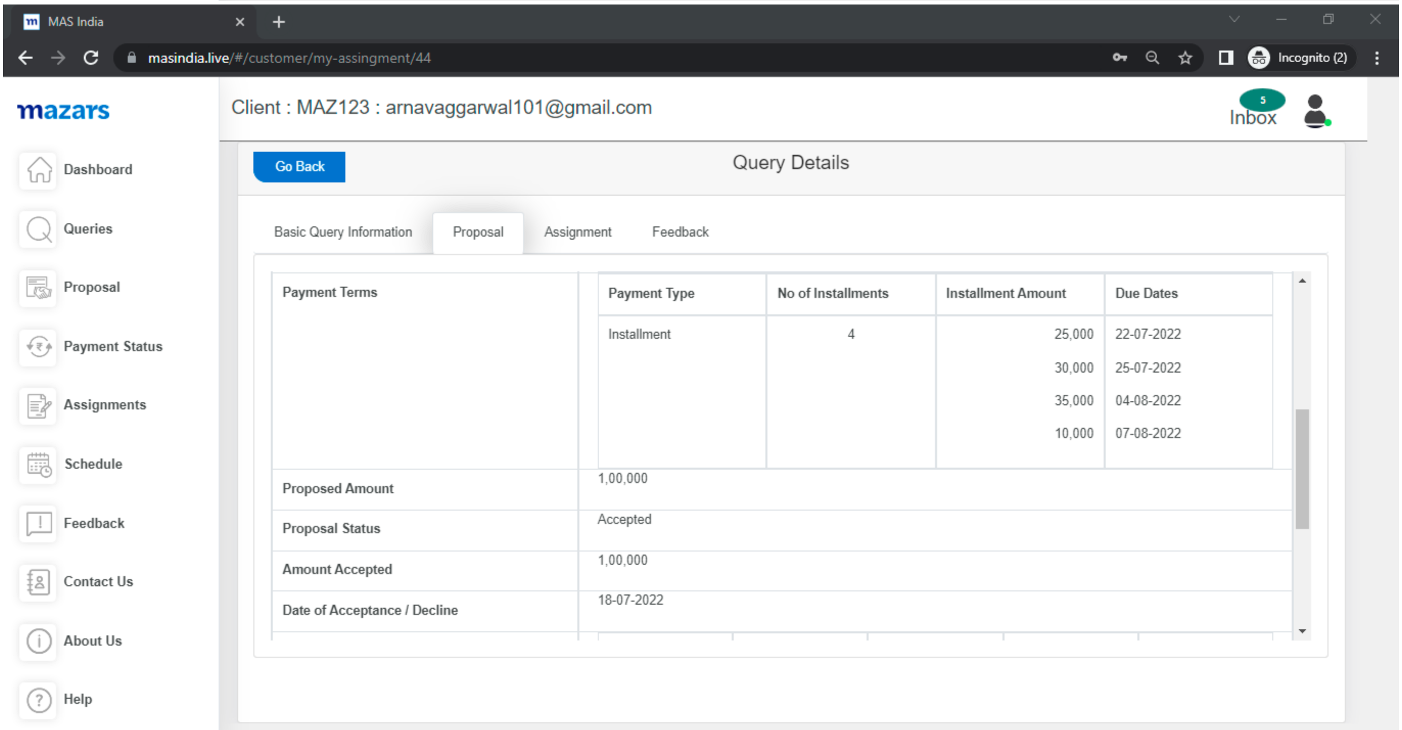
After examining the request, MAS Team may quickly restore the pending proposal status & it will be visible to the client. An email will also be sent to the client.

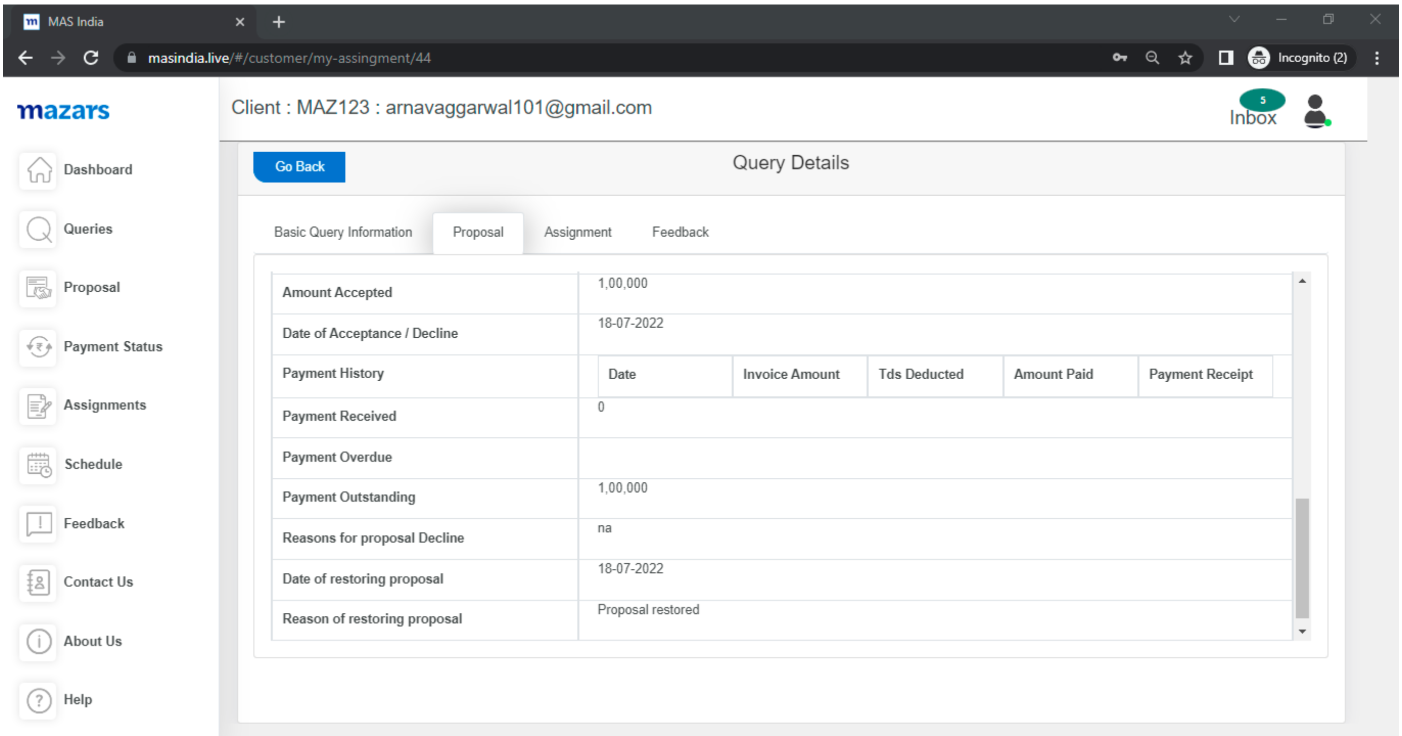


After the acceptance of Proposal, Proposal tab under the Query Details will show the following information. The client can also download the proposal by clicking download button Download

Mazars Advisory Solutions (MAS)





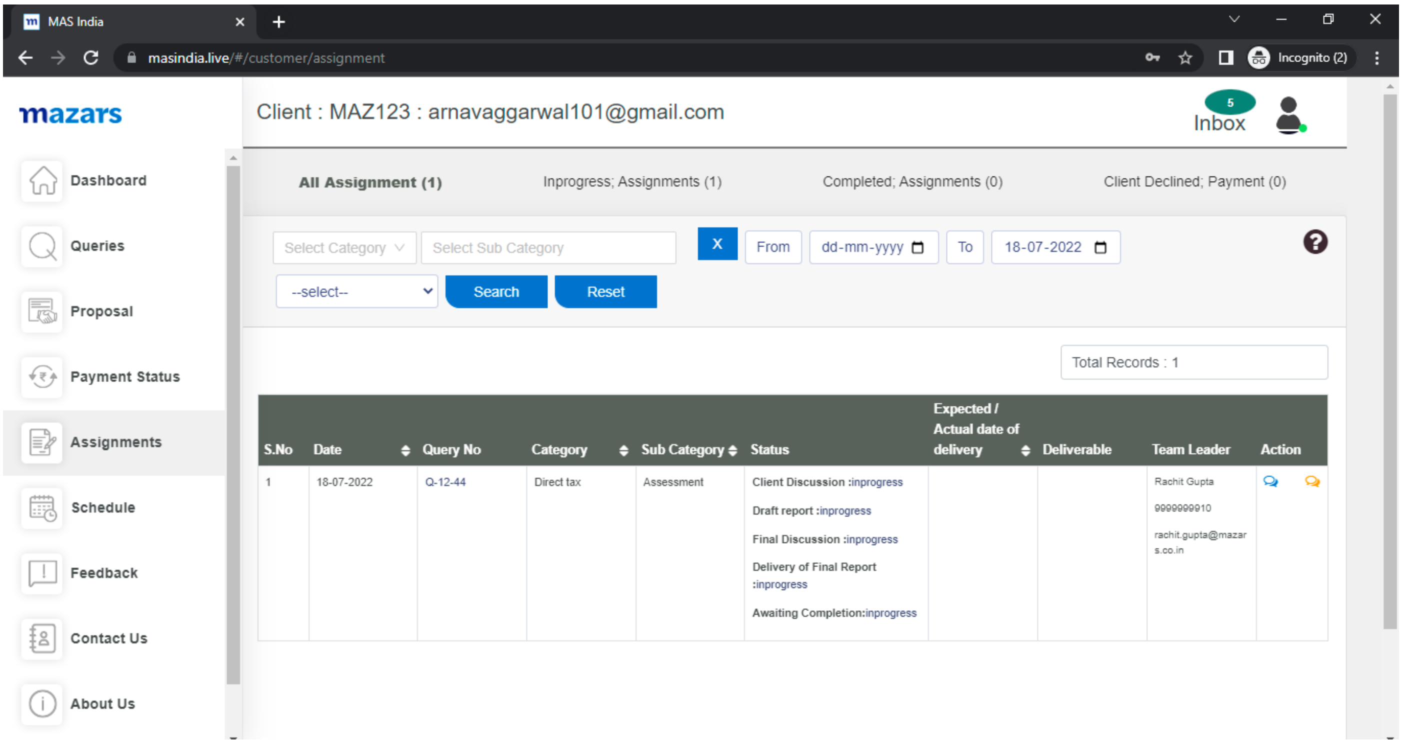

MAS India
masindia.live/#/customer/my-assingment/44
Incognito (2)
mazars
Client : MAZ123 : arnavaggarwal101@gmail.com
5
Inbox
Dashboard
Queries
Proposal
Payment Status
Assignments
Schedule
Feedback
Contact Us
About Us
Help
Go Back
Query Details
Basic Query Information
Proposal
Assignment
Feedback
Amount 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	• 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 MAS Team.
Scope of Work	• Scope of work arising from the query.
Amount	• Payment terms maybe fixed or monthly recurring payments.
Payment Terms	• Shows the payment terms, instalment(s) amount(s) & their due dates, if any.
Proposed Amount	• Amount proposed by the MAS 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)	

Mazars Advisory Solutions (MAS)

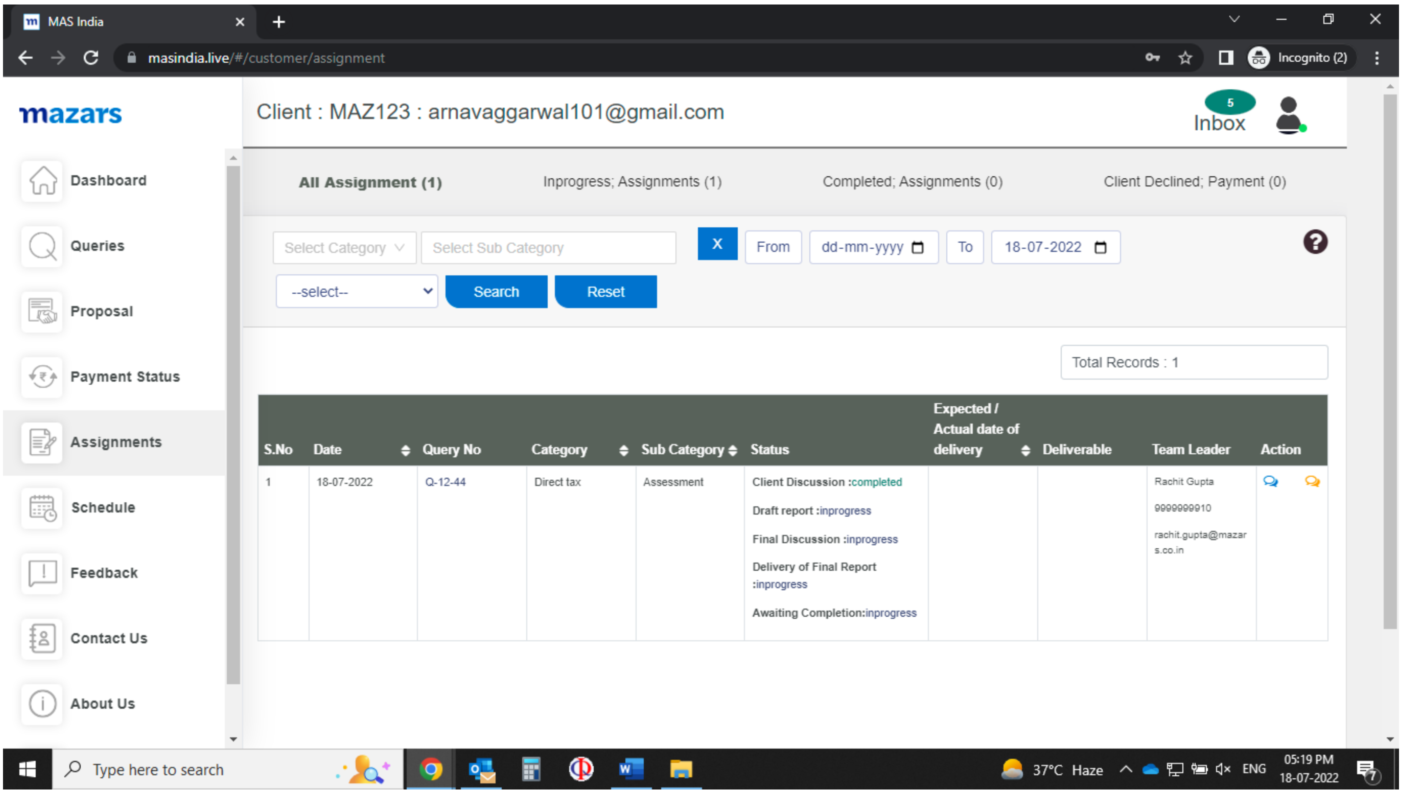
Under Assignments Tab, the client can view the processing progress of the query.



Mazars Advisory Solutions (MAS)

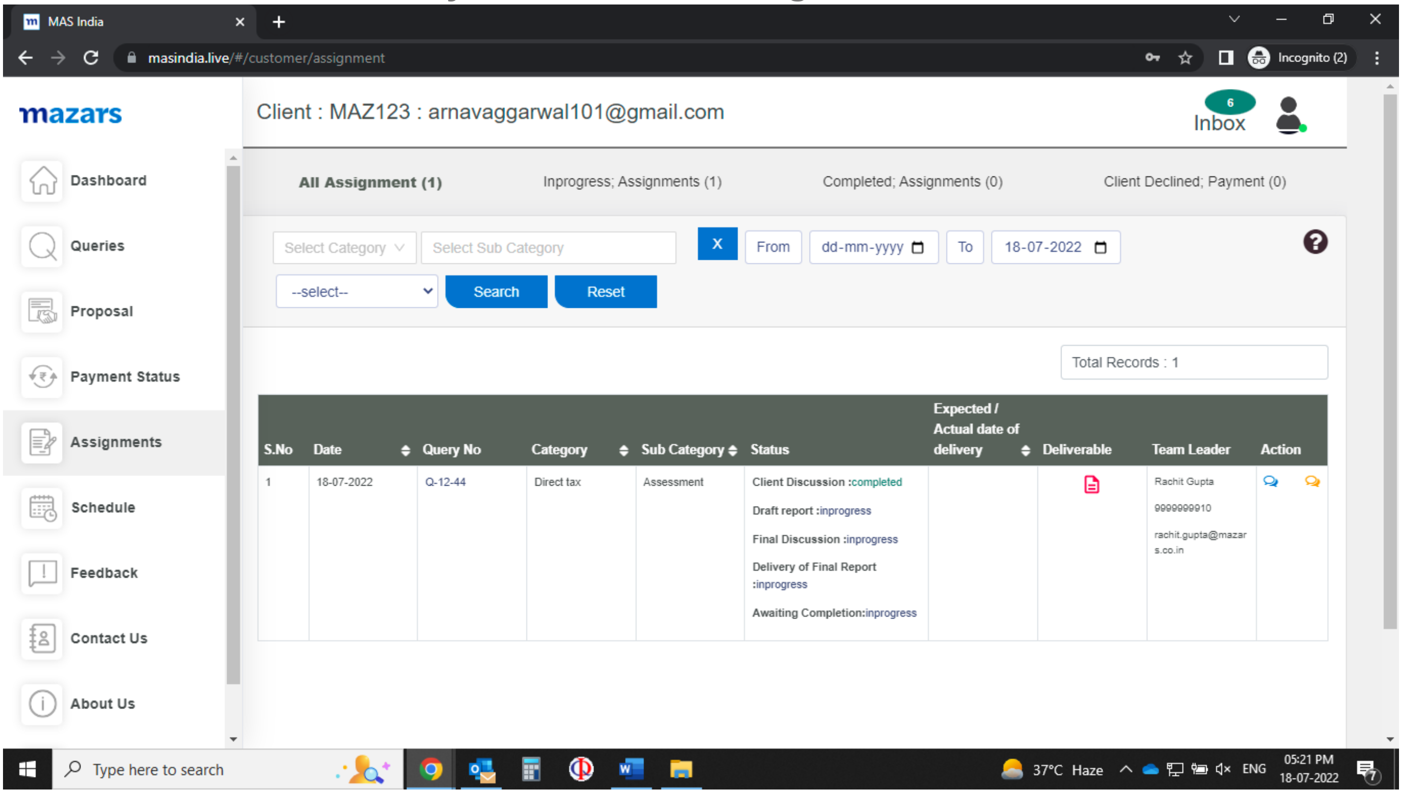
After the MAS Team has sent online draft reports for discussion with the client, following screen will be visible to the client. An email will also be sent to the client every time any draft report is uploaded along with the draft report(s).

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.

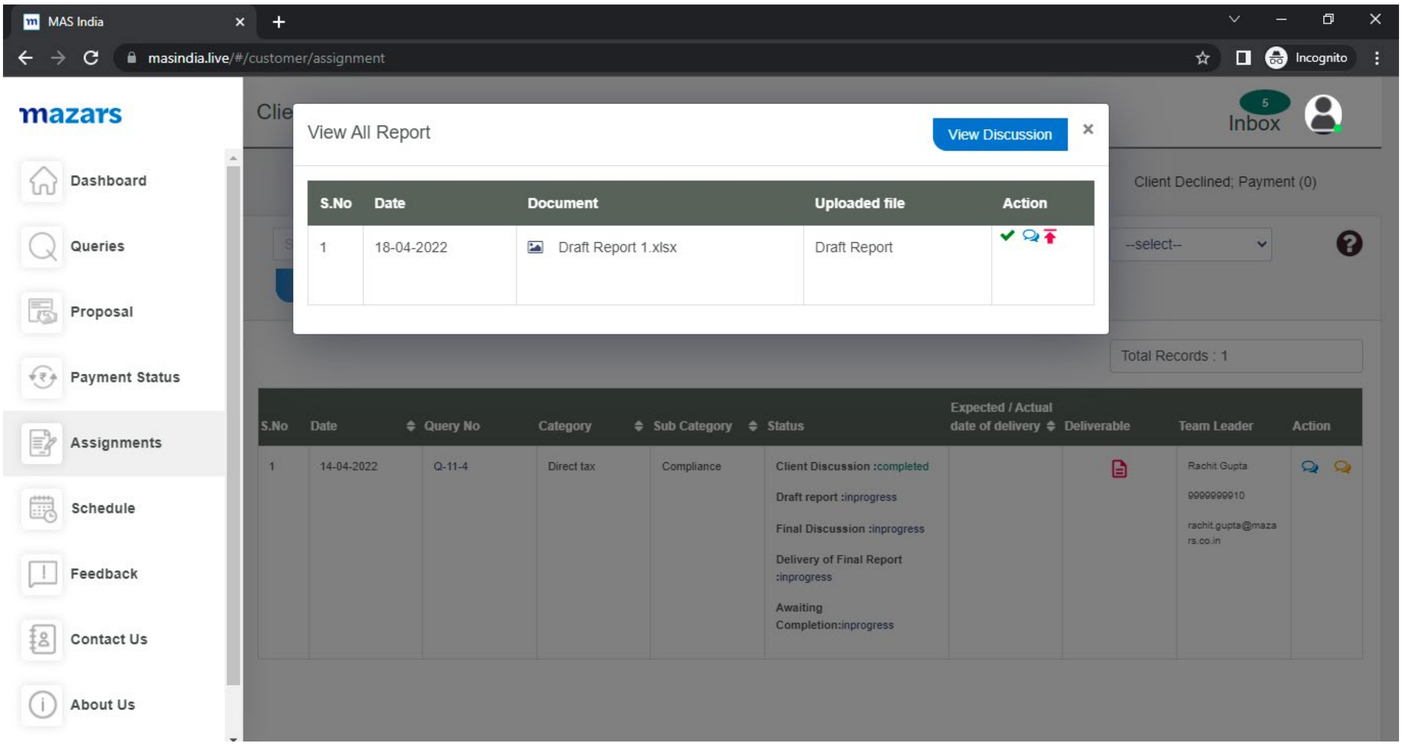


Mazars Advisory Solutions (MAS)

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.



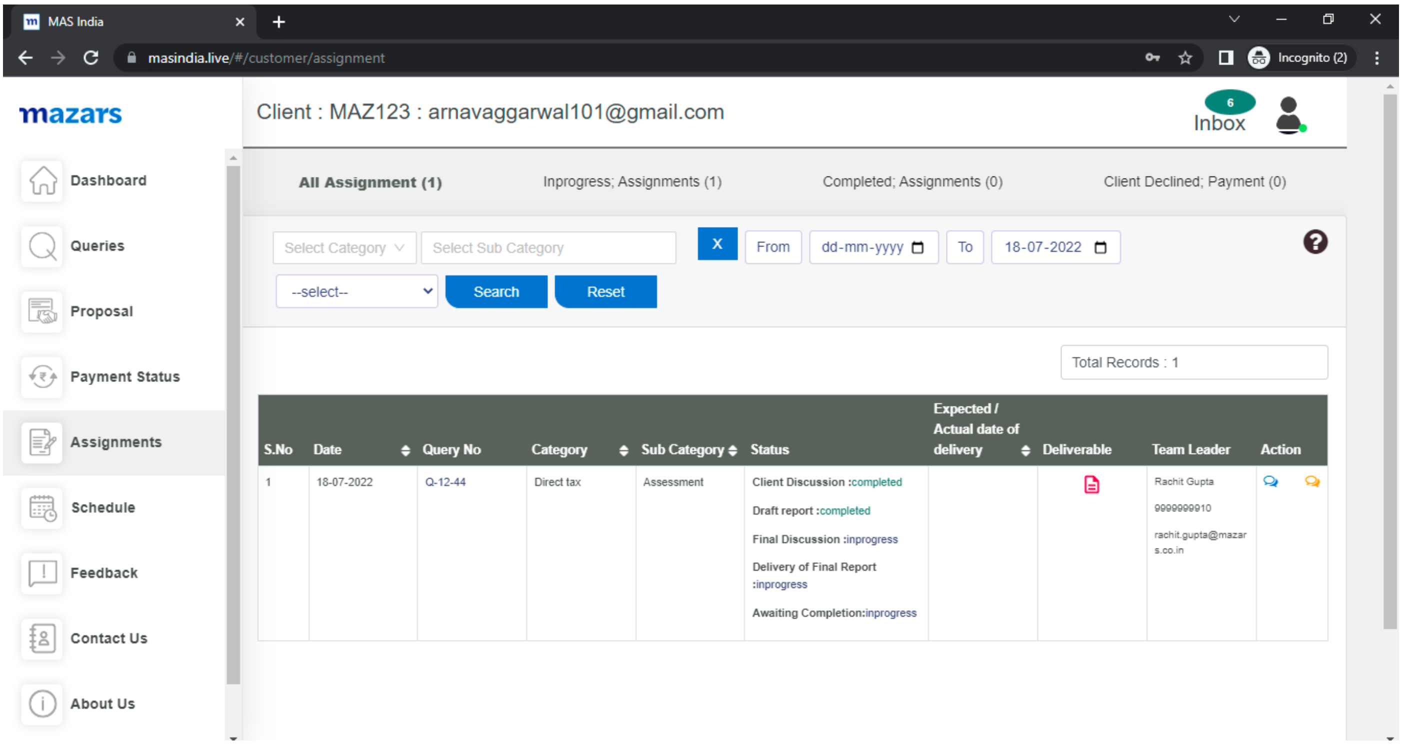
After clicking on following screen will be visible.



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 MAS 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 MAS Team. Only one file can be uploaded against each draft report.

After the discussion on draft report(s) is completed, MAS 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.

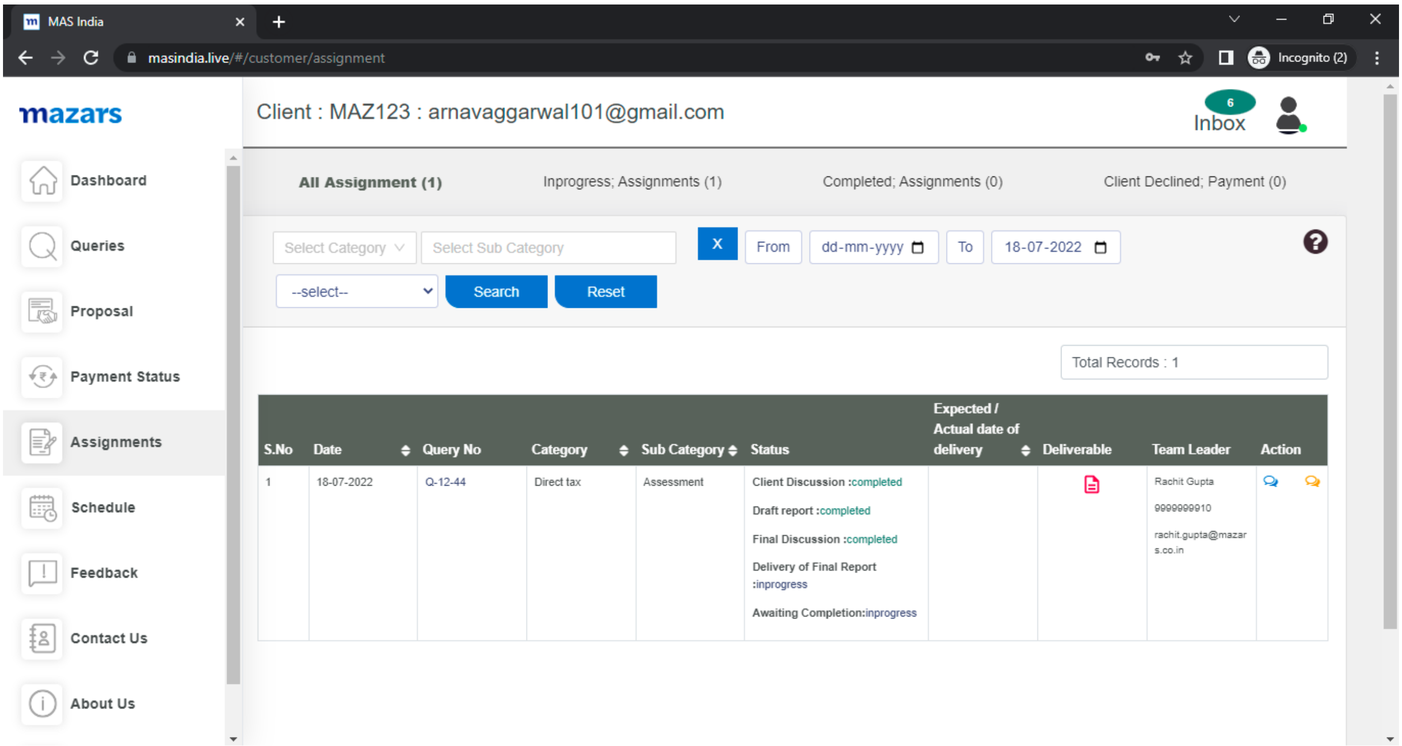


Mazars Advisory Solutions (MAS)

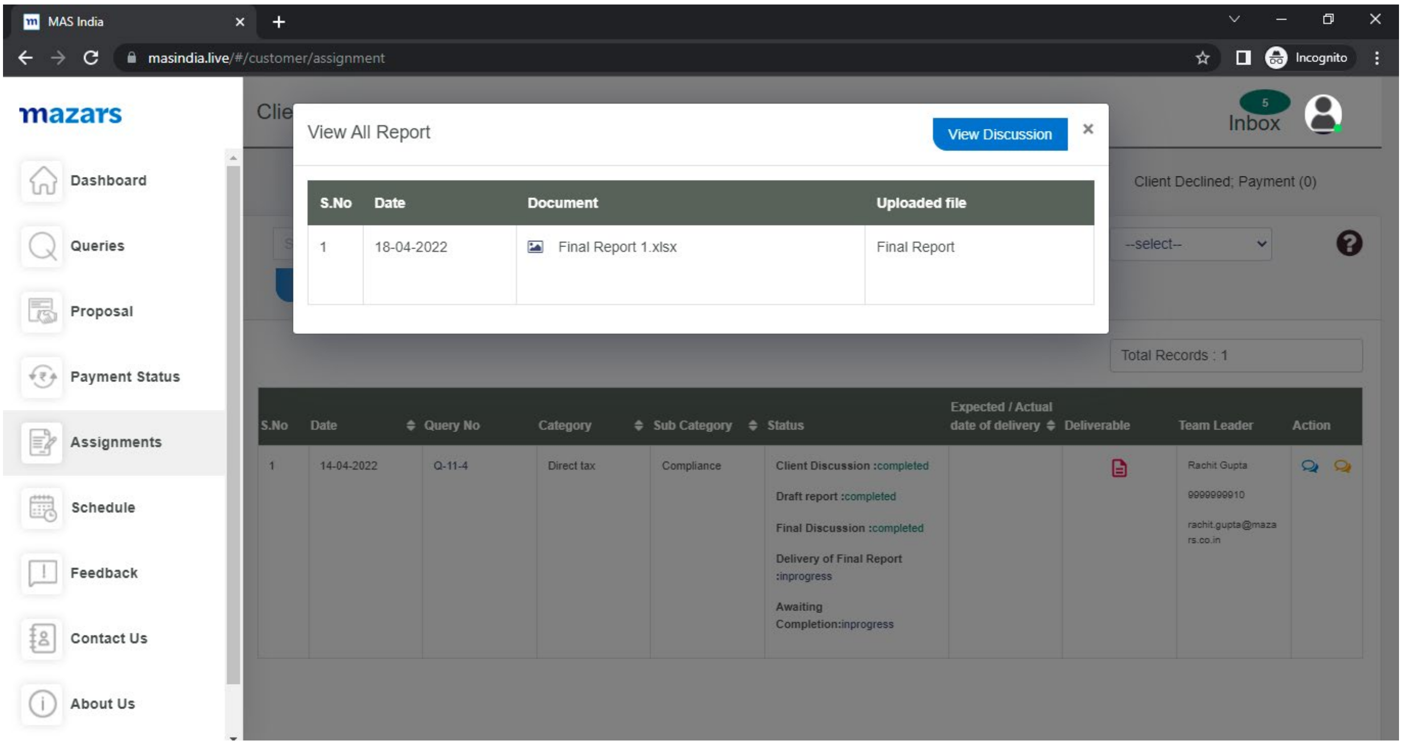
After such discussion, final reports are uploaded by the MAS Team & are visible to the client under the deliverable's icon as below. An email will be sent to the client along with the final reports as & when uploaded by the MAS Team.

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

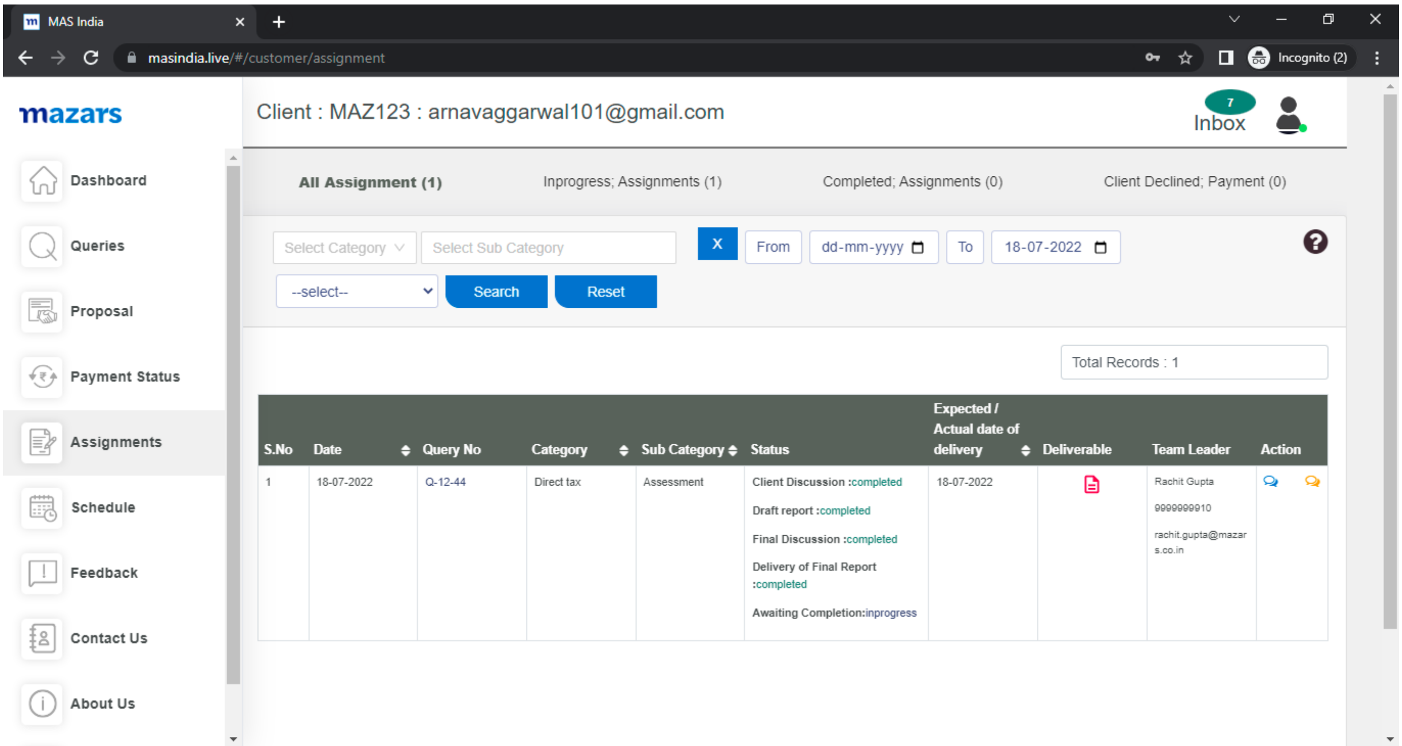
An email alert will also be sent to the client & all secondary email users confirming uploading of all final reports.



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

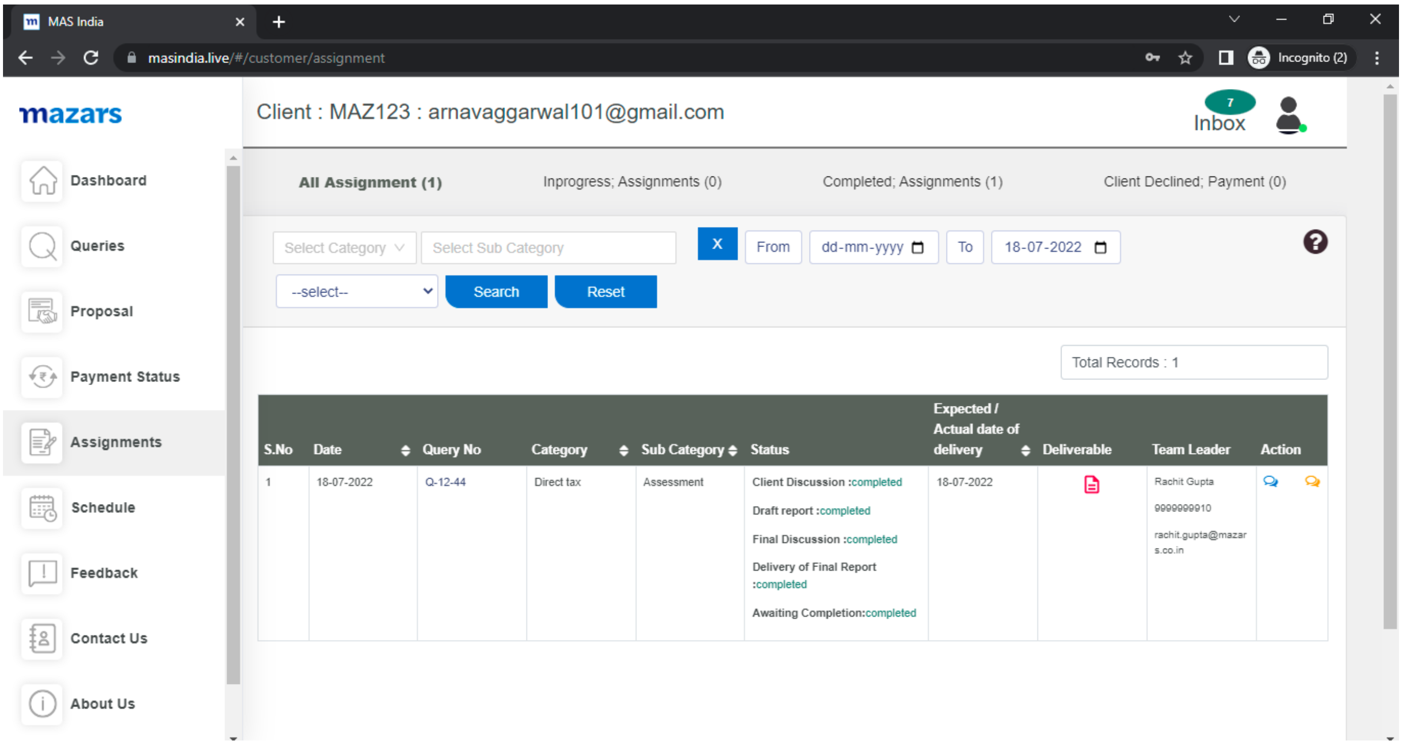


After delivery of final reports, MAS Team will mark the progress status of assignment as delivery of final report completed, below screen will be visible.

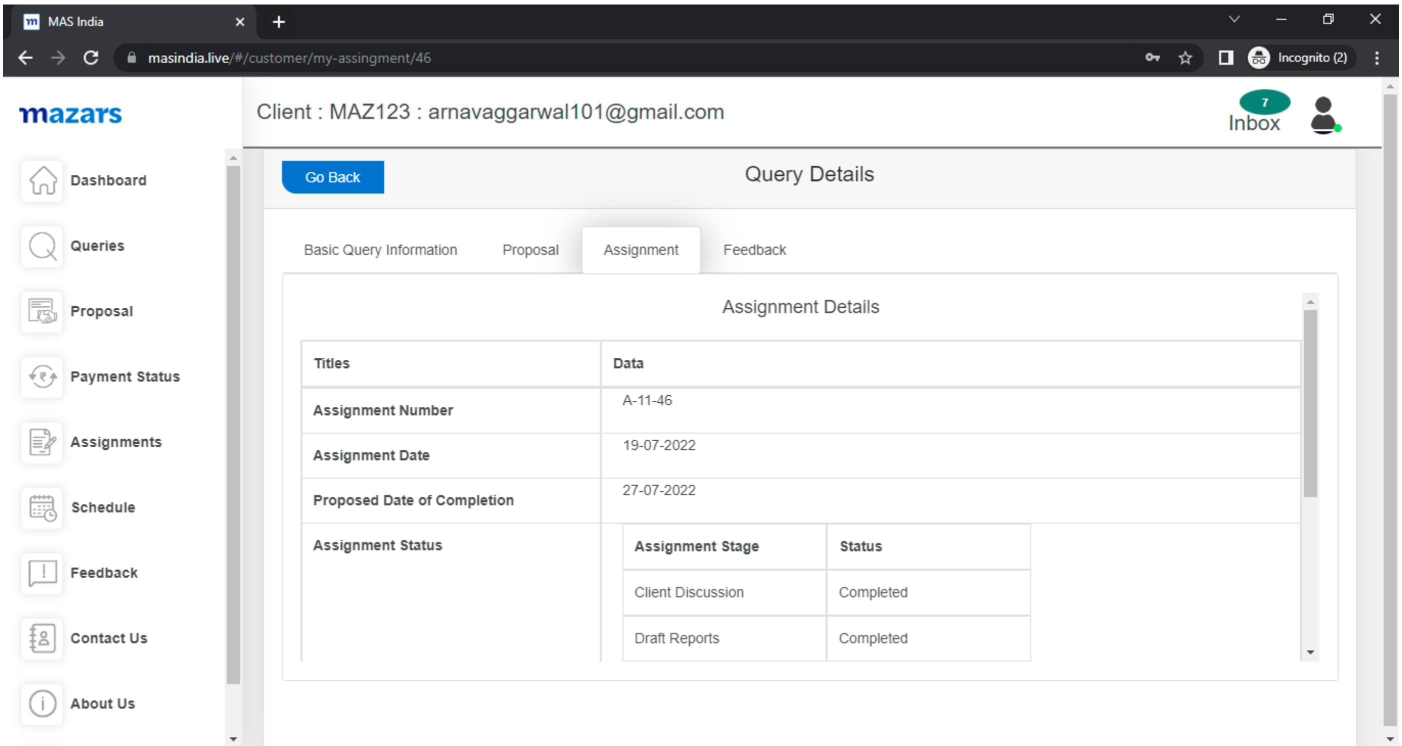


Mazars Advisory Solutions (MAS)

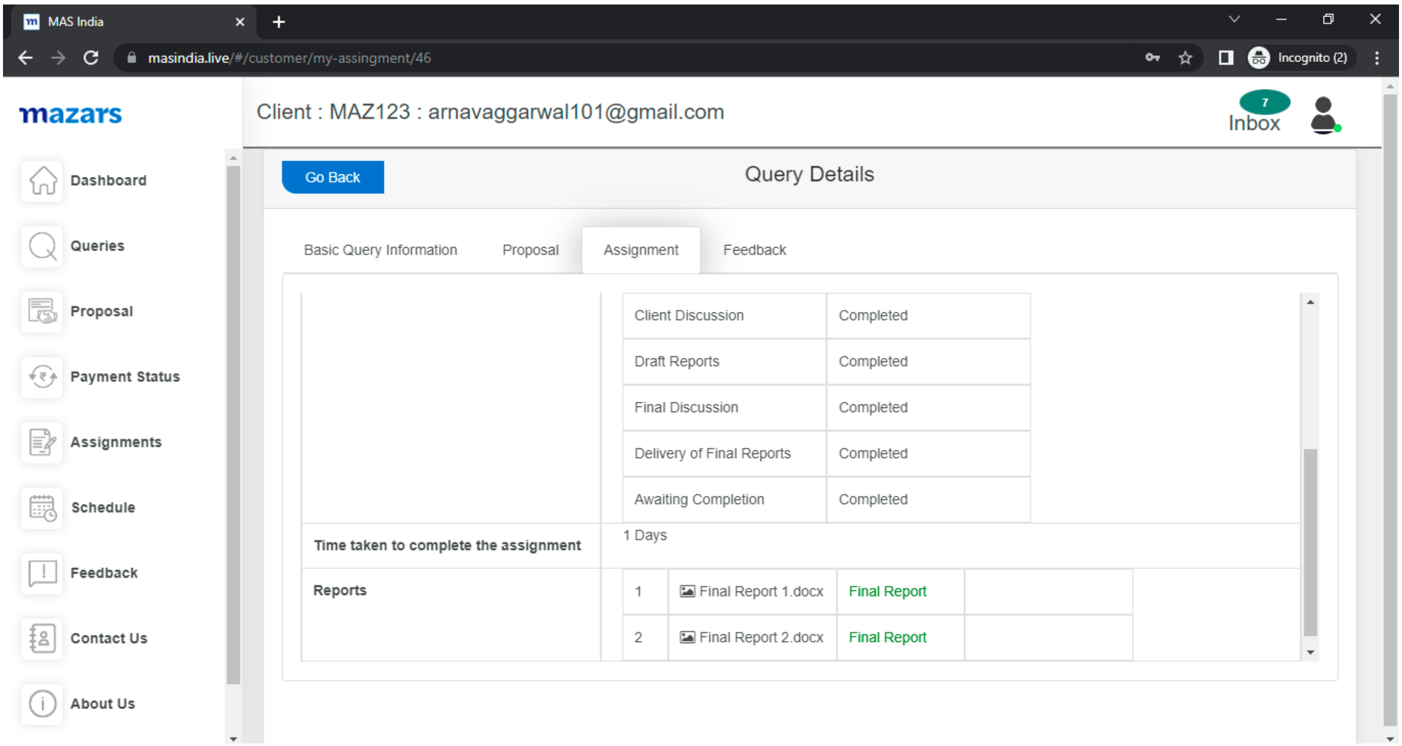
On receipt of full payment from the client, MAS Team will mark awaiting completion as completed & following screen will be visible to the client.



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



Mazars Advisory Solutions (MAS)



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.