

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 Mazars Advisory Solutions Team.
Scope of Work	<ul style="list-style-type: none"> Scope of work arising from the query.
Payment Plan	<ul style="list-style-type: none"> Payment plan is selected by the Mazars Advisory Solutions Team in consultation with the client. Following payment plans are available: <ol style="list-style-type: none"> Fixed Amount – One payment Fixed Amount – Payment in maximum four instalments Retainership Plan – Specified period Retainership Plan – Unspecified period (no end date)
Payment Terms	<ul style="list-style-type: none"> Shows the payment terms, instalment amount(s) & their due dates, if any.
Proposed Amount	<ul style="list-style-type: none"> Amount proposed by the Mazars Advisory Solutions 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>	

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

MAS India

advisorysolutions.mazars.co.in/customer/assignment

mazars

Client :MZR123
arnavaggarwal101@gmail.com

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All assignment (1) Inprogress; assignments (1) Completed; assignments (0) Client declined; payment (0) Permission; issue to invoice (0)

Select Category

Select Sub Category

X

From

dd-mm-yyyy

To

17-01-2023

--select--

?

Search

Reset

Total records : 1

S.No	Date	Query No	Category	Sub Category	Status	Expected / Actual date of delivery	Deliverable	Team Leader	Action
1	16-01-2023	Q-12-50	Direct tax	Assessment	Client Discussion :inprogress Draft report :inprogress Final Discussion :inprogress Delivery of Final Report :inprogress Awaiting Completion:inprogress			Rachit Gupta 9971165563 rachit.gupta@mazars.co.in	<div></div> <div></div>


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).

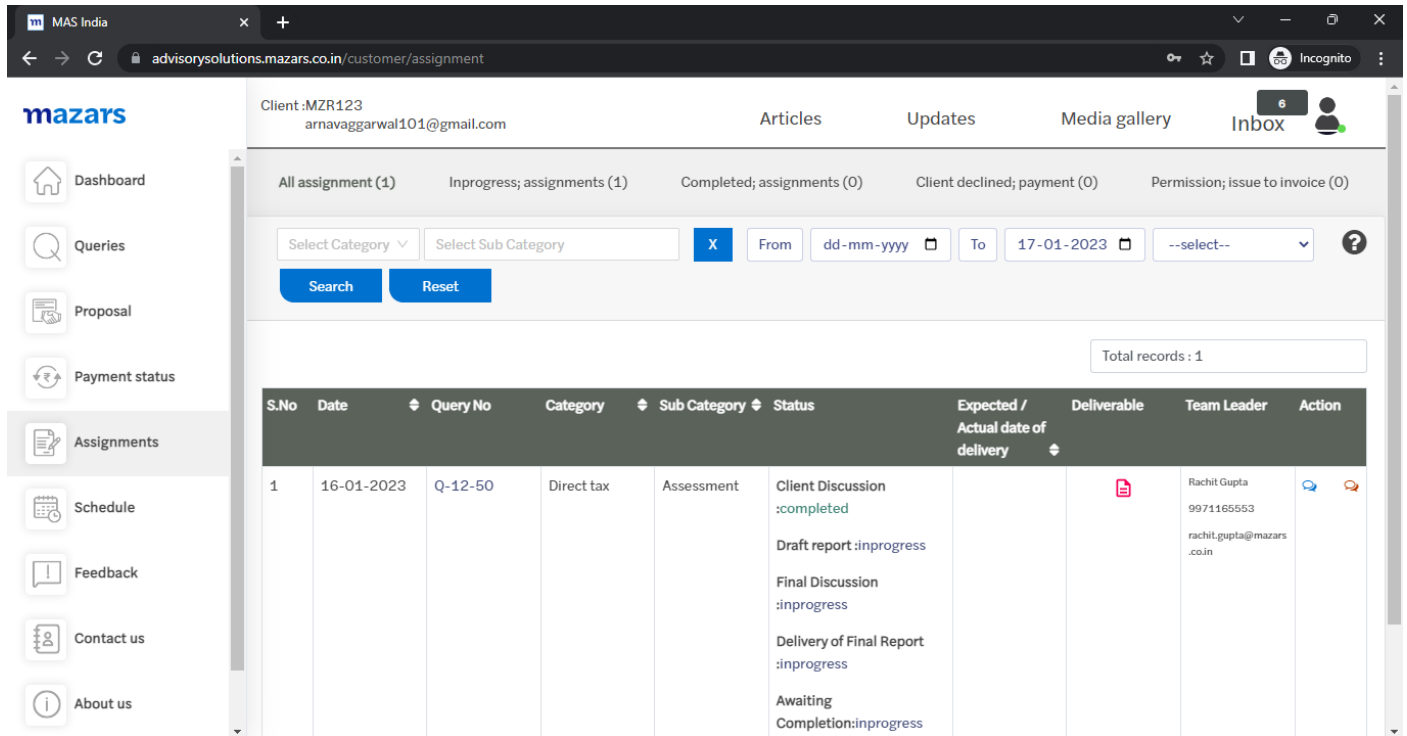
The client can send a message specifying the secondary email users to whom draft reports may also be sent. Upon such request, email will be sent to such secondary email users along with copy of draft reports.

The screenshot displays the 'Assignments' page of the Mazars Advisory Solutions web application. The browser address bar shows the URL: `advisorysolutions.mazars.co.in/customer/assignment`. The client information at the top is 'Client :MZR123' with email 'arnavaggarwal101@gmail.com'. The navigation menu on the left includes Dashboard, Queries, Proposal, Payment status, Assignments (selected), Schedule, Feedback, Contact us, and About us. The top navigation bar includes Articles, Updates, Media gallery, and an Inbox with 5 items. Below the client info, there are filters for 'All assignment (1)', 'Inprogress; assignments (1)', 'Completed; assignments (0)', 'Client declined; payment (0)', and 'Permission; issue to invoice (0)'. A search bar allows filtering by 'Select Category', 'Select Sub Category', 'From' (dd-mm-yyyy), 'To' (17-01-2023), and a dropdown for '--select--'. The 'Search' and 'Reset' buttons are present. The table below shows one record with the following details:

S.No	Date	Query No	Category	Sub Category	Status	Expected / Actual date of delivery	Deliverable	Team Leader	Action
1	16-01-2023	Q-12-50	Direct tax	Assessment	Client Discussion :completed Draft report :inprogress Final Discussion :inprogress Delivery of Final Report :inprogress Awaiting Completion:inprogress			Rachit Gupta 9971165553 rachit.gupta@mazars.co.in	

Total records : 1

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.



Client :MZR123
arnavagarwal101@gmail.com




Articles Updates Media gallery Inbox 6

All assignment (1) Inprogress; assignments (1) Completed; assignments (0) Client declined; payment (0) Permission; issue to invoice (0)

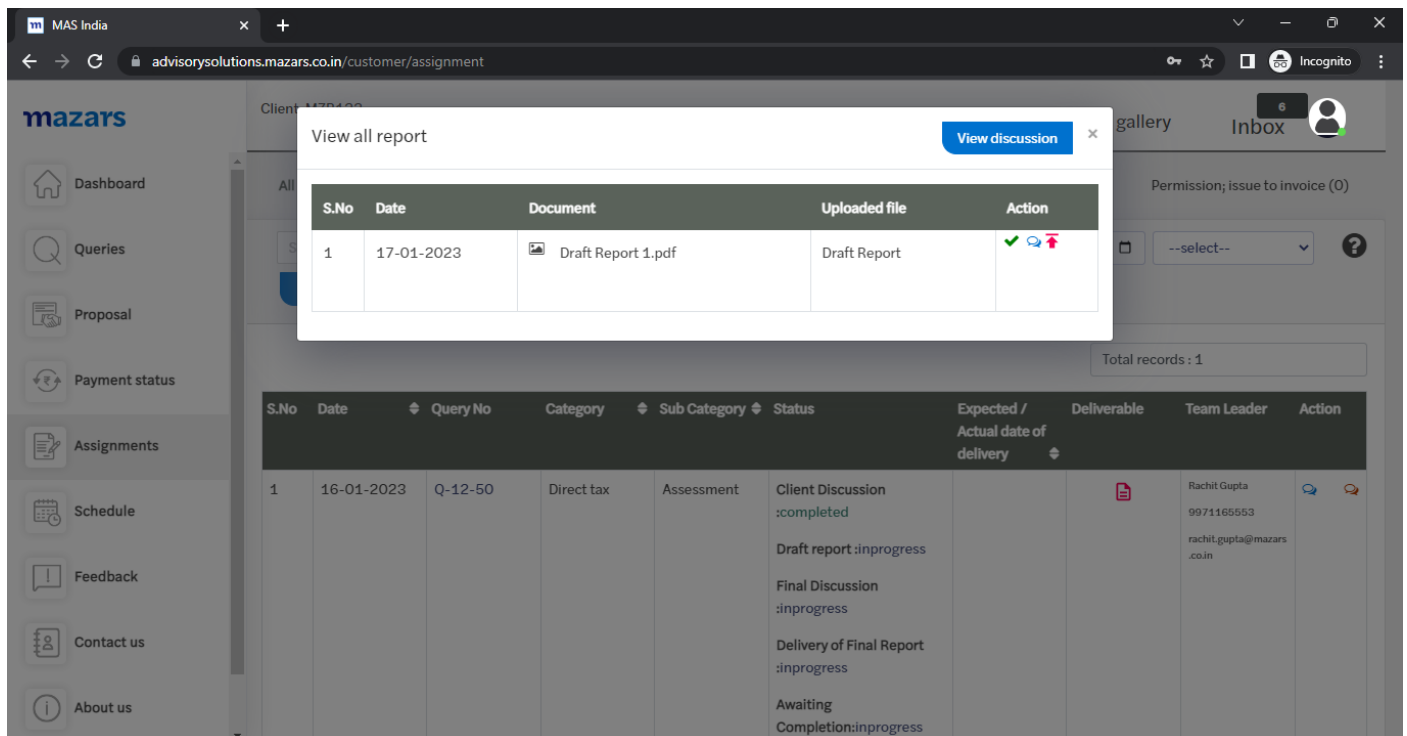
Select Category Select Sub Category X From dd-mm-yyyy To 17-01-2023 --select-- ?

Search Reset




Total records : 1

S.No	Date	Query No	Category	Sub Category	Status	Expected / Actual date of delivery	Deliverable	Team Leader	Action
1	16-01-2023	Q-12-50	Direct tax	Assessment	Client Discussion :completed Draft report :inprogress Final Discussion :inprogress Delivery of Final Report :inprogress Awaiting Completion:inprogress			Rachit Gupta 9971165553 rachit.gupta@mazars.co.in	 




After clicking on  following screen will be visible.






View all report View discussion x

S.No	Date	Document	Uploaded file	Action
1	17-01-2023	 Draft Report 1.pdf	Draft Report	 

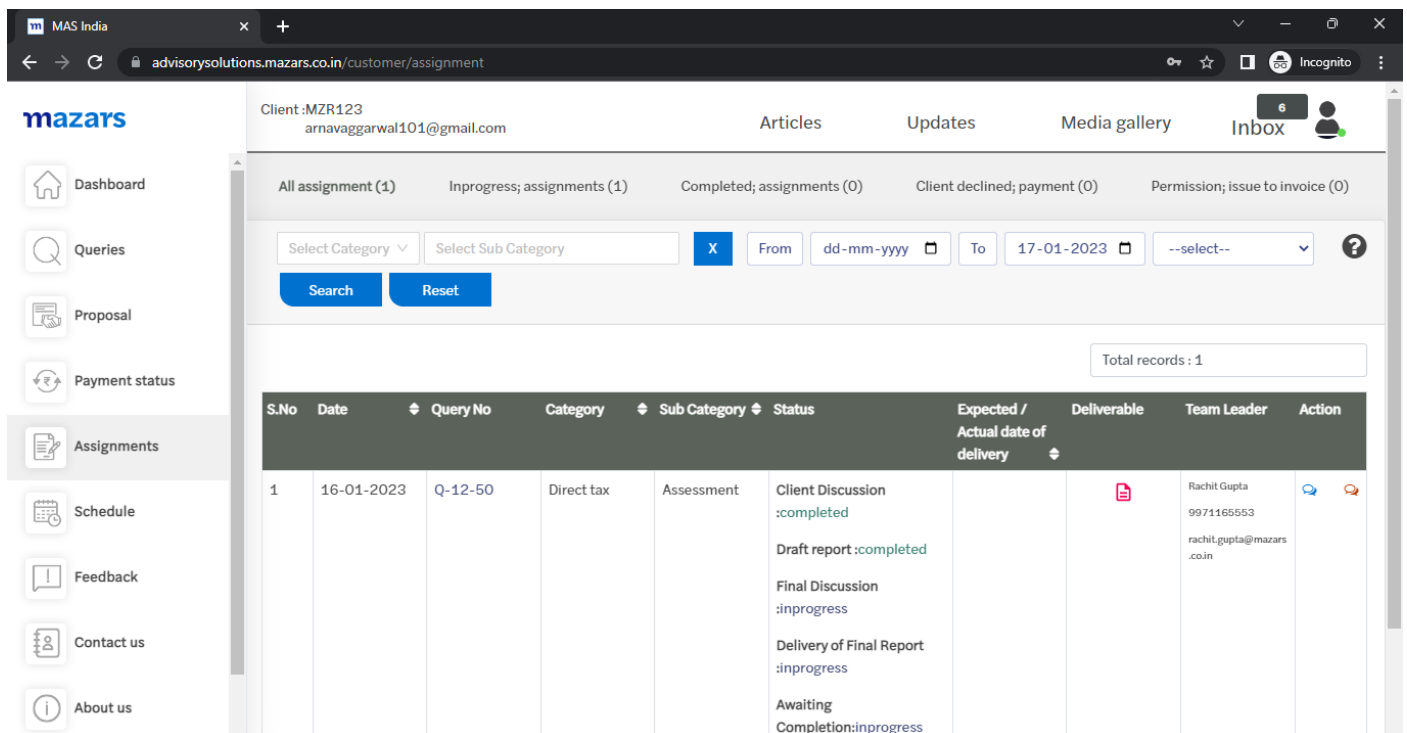
Total records : 1

S.No	Date	Query No	Category	Sub Category	Status	Expected / Actual date of delivery	Deliverable	Team Leader	Action
1	16-01-2023	Q-12-50	Direct tax	Assessment	Client Discussion :completed Draft report :inprogress Final Discussion :inprogress Delivery of Final Report :inprogress Awaiting Completion:inprogress			Rachit Gupta 9971165553 rachit.gupta@mazars.co.in	 




View all Reports: Action Buttons


	<ul style="list-style-type: none"> Client can accept the draft report by clicking on this icon.
	<ul style="list-style-type: none"> 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.
	<ul style="list-style-type: none"> 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.



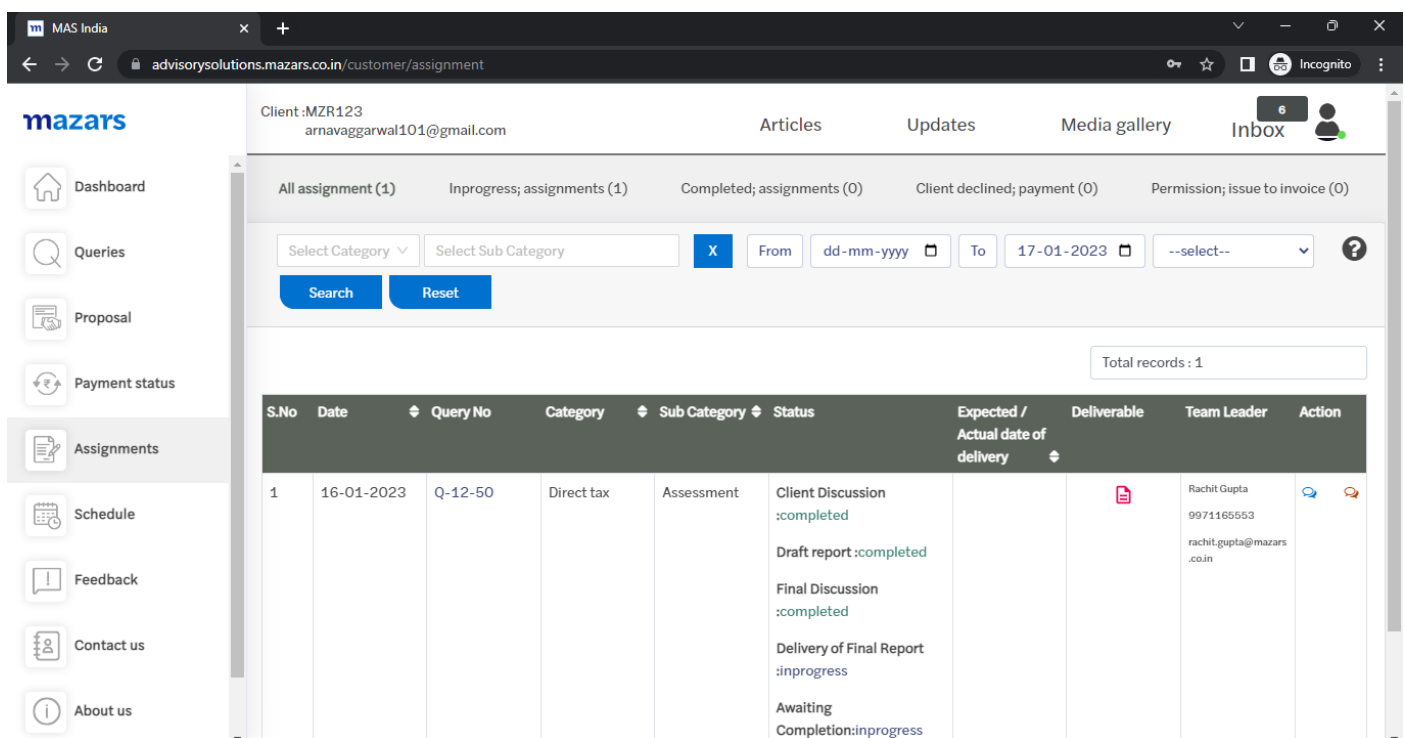
The screenshot displays the Mazars Advisory Solutions web application. The top navigation bar includes the Mazars logo, a sidebar menu with options like Dashboard, Queries, Proposal, Payment status, Assignments (highlighted), Schedule, Feedback, Contact us, and About us. The main content area shows the 'Assignments' page for a client named MZR123 (arnavaggarwal101@gmail.com). It features a search filter with 'All assignment (1)' selected, and a table listing the assignment details.

S.No	Date	Query No	Category	Sub Category	Status	Expected / Actual date of delivery	Deliverable	Team Leader	Action
1	16-01-2023	Q-12-50	Direct tax	Assessment	Client Discussion :completed Draft report :completed Final Discussion :inprogress Delivery of Final Report :inprogress Awaiting Completion:inprogress			Rachit Gupta 9971165553 rachit.gupta@mazars.co.in	 

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.

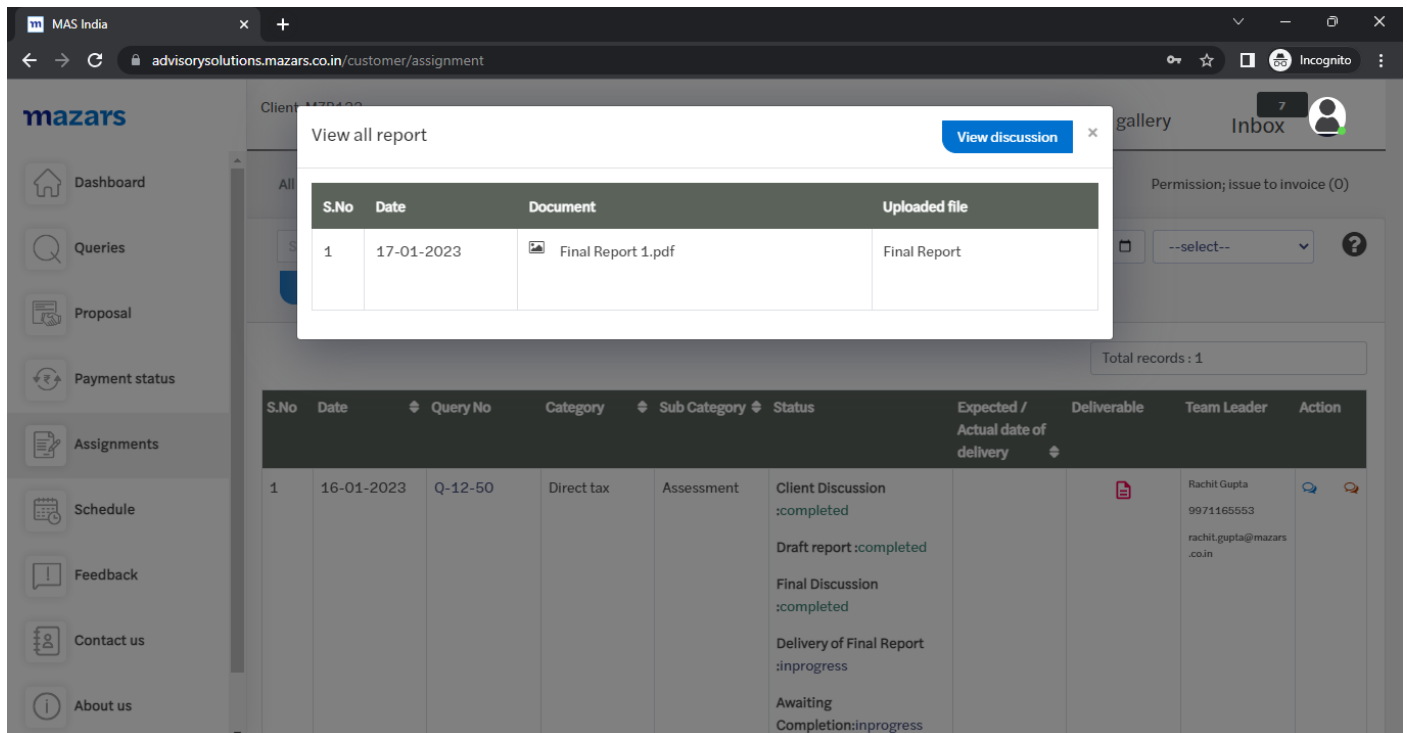


The screenshot displays the Mazars Advisory Solutions web application interface. The browser address bar shows the URL: `advisorysolutions.mazars.co.in/customer/assignment`. The client information is: Client: MZR123, `arnavaggarwal101@gmail.com`. The interface includes a sidebar with navigation options: Dashboard, Queries, Proposal, Payment status, Assignments (selected), Schedule, Feedback, Contact us, and About us. The main content area shows a list of assignments with filters and a search bar. The search filters are: Select Category, Select Sub Category, From (dd-mm-yyyy), To (17-01-2023), and --select--.


The search results show 1 record. The table below details the assignment:

S.No	Date	Query No	Category	Sub Category	Status	Expected / Actual date of delivery	Deliverable	Team Leader	Action
1	16-01-2023	Q-12-50	Direct tax	Assessment	Client Discussion :completed Draft report :completed Final Discussion :completed Delivery of Final Report :inprogress Awaiting Completion:inprogress			Rachit Gupta 9971165553 rachit.gupta@mazars.co.in	 




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



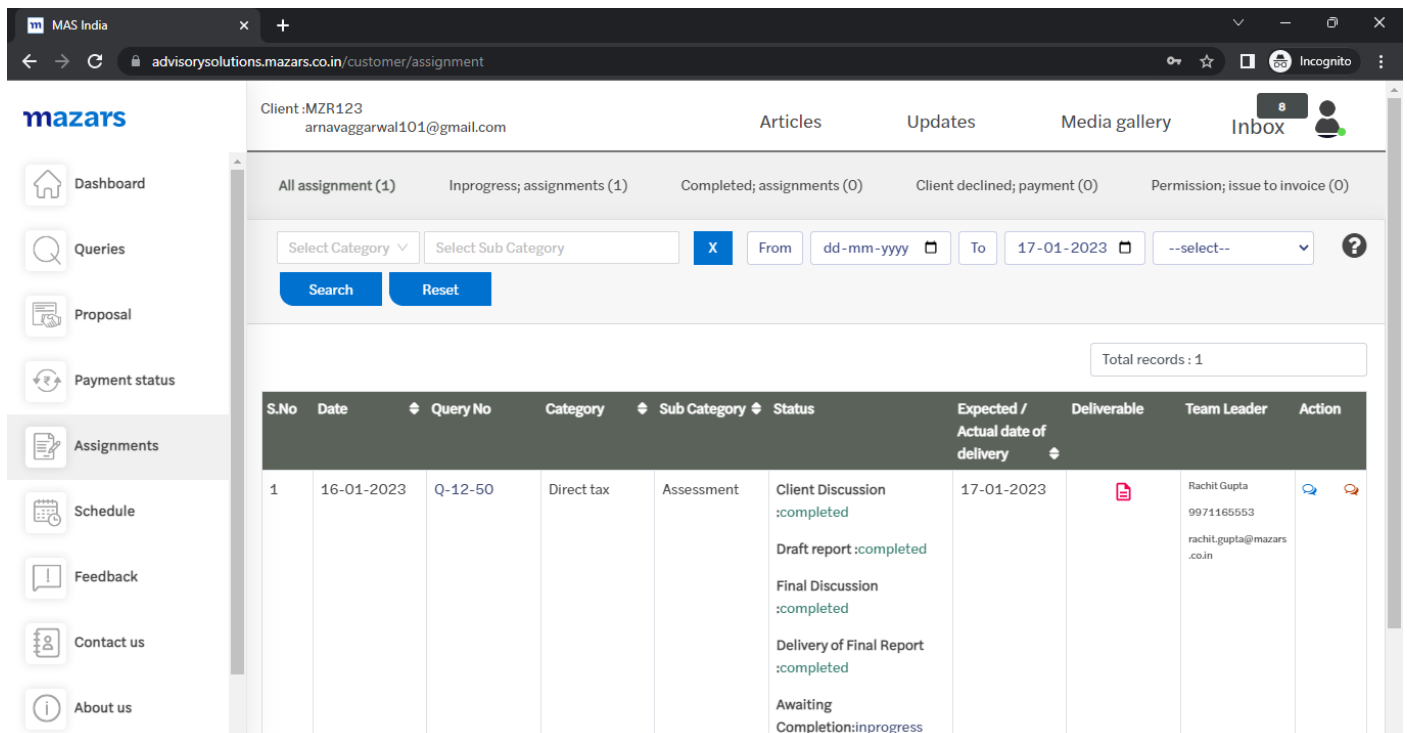
View all report

S.No	Date	Document	Uploaded file
1	17-01-2023	 Final Report 1.pdf	Final Report

Total records : 1

S.No	Date	Query No	Category	Sub Category	Status	Expected / Actual date of delivery	Deliverable	Team Leader	Action
1	16-01-2023	Q-12-50	Direct tax	Assessment	Client Discussion :completed Draft report :completed Final Discussion :completed Delivery of Final Report :inprogress Awaiting Completion:inprogress			Rachit Gupta 9971165553 rachit.gupta@mazars.co.in	 

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.



Client :MZR123
arnavaggarwal101@gmail.com




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All assignment (1) Inprogress; assignments (1) Completed; assignments (0) Client declined; payment (0) Permission; issue to invoice (0)

Select Category Select Sub Category X From dd-mm-yyyy To 17-01-2023 --select--

Search Reset

Total records : 1

S.No	Date	Query No	Category	Sub Category	Status	Expected / Actual date of delivery	Deliverable	Team Leader	Action
1	16-01-2023	Q-12-50	Direct tax	Assessment	Client Discussion :completed Draft report :completed Final Discussion :completed Delivery of Final Report :completed Awaiting Completion:inprogress	17-01-2023		Rachit Gupta 9971165553 rachit.gupta@mazars.co.in	 

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.

Client: MZR123
arnavaggarwal101@gmail.com

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All assignment (1) Inprogress; assignments (0) Completed; assignments (1) Client declined; payment (0) Permission; issue to invoice (0)

Select Category Select Sub Category X From dd-mm-yyyy To 17-01-2023 --select-- ?

Search Reset

Total records : 1

S.No	Date	Query No	Category	Sub Category	Status	Expected / Actual date of delivery	Deliverable	Team Leader	Action
1	16-01-2023	Q-12-50	Direct tax	Assessment	Client Discussion :completed Draft report :completed Final Discussion :completed Delivery of Final Report :completed Awaiting Completion:completed	17-01-2023		Rachit Gupta 9971165553 rachit.gupta@mazars.co.in	

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

Client: MZR123
arnavaggarwal101@gmail.com

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Go Back Query details

Basic query information Proposal Assignment Feedback Recording

Assignment details

Titles	Data						
Assignment number	A-12-50						
Assignment date	17-01-2023						
Proposed date of completion	24-01-2023						
Assignment status	<table border="1"> <thead> <tr> <th>Assignment stage</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td>Client discussion</td> <td>Completed</td> </tr> <tr> <td>Draft reports</td> <td>Completed</td> </tr> </tbody> </table>	Assignment stage	Status	Client discussion	Completed	Draft reports	Completed
Assignment stage	Status						
Client discussion	Completed						
Draft reports	Completed						

MAS India

advisorysolutions.mazars.co.in/customer/my-assignment/50

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Client :MZR123
arnavaggarwal101@gmail.com

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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

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Client :MZR123
arnavaggarwal101@gmail.com

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	<table><tbody><tr><td>Final discussion</td><td>Completed</td></tr><tr><td>Delivery of final reports</td><td>Completed</td></tr><tr><td>Awaiting completion</td><td>Completed</td></tr></tbody></table>	Final discussion	Completed	Delivery of final reports	Completed	Awaiting completion	Completed
Final discussion	Completed						
Delivery of final reports	Completed						
Awaiting completion	Completed						
<div>Time taken to complete the assignment</div>	1 Days						
<div>Uploaded documents</div> <div><div>Final Report 1.pdf</div></div>	<div>Folder content</div>						

Query Detail Page: Assignment

Assignment Number	<ul style="list-style-type: none">Shows the unique assignment number allotted to the query.
Assignment date	<ul style="list-style-type: none">Shows the date on which the assignment has been created, i.e., date of acceptance of proposal.
Proposed date of completion	<ul style="list-style-type: none">Shows the expected date of completion of assignment.
Assignment Status	<ul style="list-style-type: none">Shows different stages of progress of the assignment.
Time taken to complete the assignment	<ul style="list-style-type: none">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.

The screenshot shows the 'Query details' page for a client (MZR123, arnavaggarwal101@gmail.com). The 'Assignment' tab is active, showing a table of tasks and a list of uploaded documents.

Basic query information	Proposal	Assignment	Feedback	Recording						
		<table border="1"><tr><td>Final discussion</td><td>Inprogress</td></tr><tr><td>Delivery of final reports</td><td>Inprogress</td></tr><tr><td>Awaiting completion</td><td>Inprogress</td></tr></table>	Final discussion	Inprogress	Delivery of final reports	Inprogress	Awaiting completion	Inprogress		
Final discussion	Inprogress									
Delivery of final reports	Inprogress									
Awaiting completion	Inprogress									
Time taken to complete the assignment										
Uploaded documents	Folder content									
Draft Report 1.pdf										

The screenshot shows the 'Query details' page for the same client (MZR123, arnavaggarwal101@gmail.com). The 'Assignment' tab is active, showing a table of tasks and a list of uploaded documents.

Basic query information	Proposal	Assignment	Feedback	Recording						
		<table border="1"><tr><td>Final discussion</td><td>Completed</td></tr><tr><td>Delivery of final reports</td><td>Completed</td></tr><tr><td>Awaiting completion</td><td>Completed</td></tr></table>	Final discussion	Completed	Delivery of final reports	Completed	Awaiting completion	Completed		
Final discussion	Completed									
Delivery of final reports	Completed									
Awaiting completion	Completed									
Time taken to complete the assignment	1 Days									
Uploaded documents	Folder content									
Final Report 1.pdf										