

Processing of Proposal:

Mazars Advisory Solutions 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.

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Client :MZR123
arnavaggarwal101@gmail.com

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All Proposals (1)

Inprogress; Proposals (1)

Accepted; Proposals (0)

Declined; Proposals (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	Payment plan	Date of proposal	Date of acceptance / decline of proposal	Status	Proposed amount	Accepted amount	Action
1	16-01-2023	Q-12-50	Direct tax	Assessment	2	17-01-2023		Inprogress/ Acceptance	100	0	

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

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Proposal Details

Name of Team Leader	TL.1-Rachit Gupta		
Date of allocation	17-01-2023		
Proposed amount	100		
Scope of work	Test Proposal.		
Payment terms	Payment plan		Amount of fee
	Fixed Amount-Instalment plan		100

☐ Please read engagement letter

AcceptReject

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Proposal Details

	Fixed Amount-Instalment plan		100
	No of installment	Installment amount	Due dates
	4	25	24-01-2023
		25	27-01-2023
25		31-01-2023	
25		03-02-2023	

Proposal status Inprogress

☐ Please read engagement letter

AcceptReject

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 Mazars Advisory Solutions Team for any discussion about the proposal and may accept or reject the proposal after such discussion. Conference can also be done by the Team with the client for any discussion. The 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: MZR123
arnavaggarwal101@gmail.com

Articles Updates Media gallery Inbox

All Proposals (1) Inprogress; Proposals (1) Accepted; Proposals (0) Declined; Proposals (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	Payment plan	Date of proposal	Date of acceptance / decline of proposal	Status	Proposed amount	Accepted amount	Action
1	16-01-2023	Q-12-50	Direct tax	Assessment	2	17-01-2023		Inprogress/Acceptance	100	0	

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All Proposals (1)

Inprogress; Proposals (0)

Accepted; Proposals (1)

Declined; Proposals (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	Payment plan	Date of proposal	Date of acceptance / decline of proposal	Status	Proposed amount	Accepted amount	Action
1	16-01-2023	Q-12-50	Direct tax	Assessment	2	17-01-2023	17-01-2023	Accepted; Proposal	100	100	 

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

Status	Interpretation	Screenshot listing
In-progress; Preparation	Mazars Advisory Solutions Team is preparing the proposal	At S.No.1
In-progress; Acceptance	Mazars Advisory Solutions 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

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All Proposals (4) Inprogress; Proposals (2) Accepted; Proposals (1) Declined; Proposals (1)

Select Category Select Sub Category X From dd-mm-yyyy To 30-01-2023 ?

--select-- Search Reset

Total records : 4

S.No	Date	Query No	Category	Sub category	Payment plan	Date of proposal	Date of acceptance / decline of proposal	Status	Proposed amount	Accepted amount	Action
1	30-01-2023	Q-22-54	Indirect tax	Assessment				Inprogress/Preparation	0	0	 
2	30-01-2023	Q-11-53	Direct tax	Compliance	1	30-01-2023		Inprogress/Acceptance	200	0	  
3	16-01-2023	Q-21-51	Indirect tax	Compliance	2	27-01-2023	30-01-2023	Declined; Proposal	100	0	 
4	16-01-2023	Q-12-50	Direct tax	Assessment	2	17-01-2023	17-01-2023	Accepted; Proposal	100	100	  

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: MZR123
arnavaggarwal101@gmail.com

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Go Back Proposal Details

Name of Team Leader	TL.1-Rachit Gupta				
Date of allocation	17-01-2023				
Proposed amount	100				
Scope of work	Test Proposal.				
Payment terms	<table><tr><td>Payment plan</td><td>Amount of fee</td></tr><tr><td>Fixed Amount-Instalment plan</td><td>100</td></tr></table>	Payment plan	Amount of fee	Fixed Amount-Instalment plan	100
Payment plan	Amount of fee				
Fixed Amount-Instalment plan	100				

☐ 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.

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

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

--select--

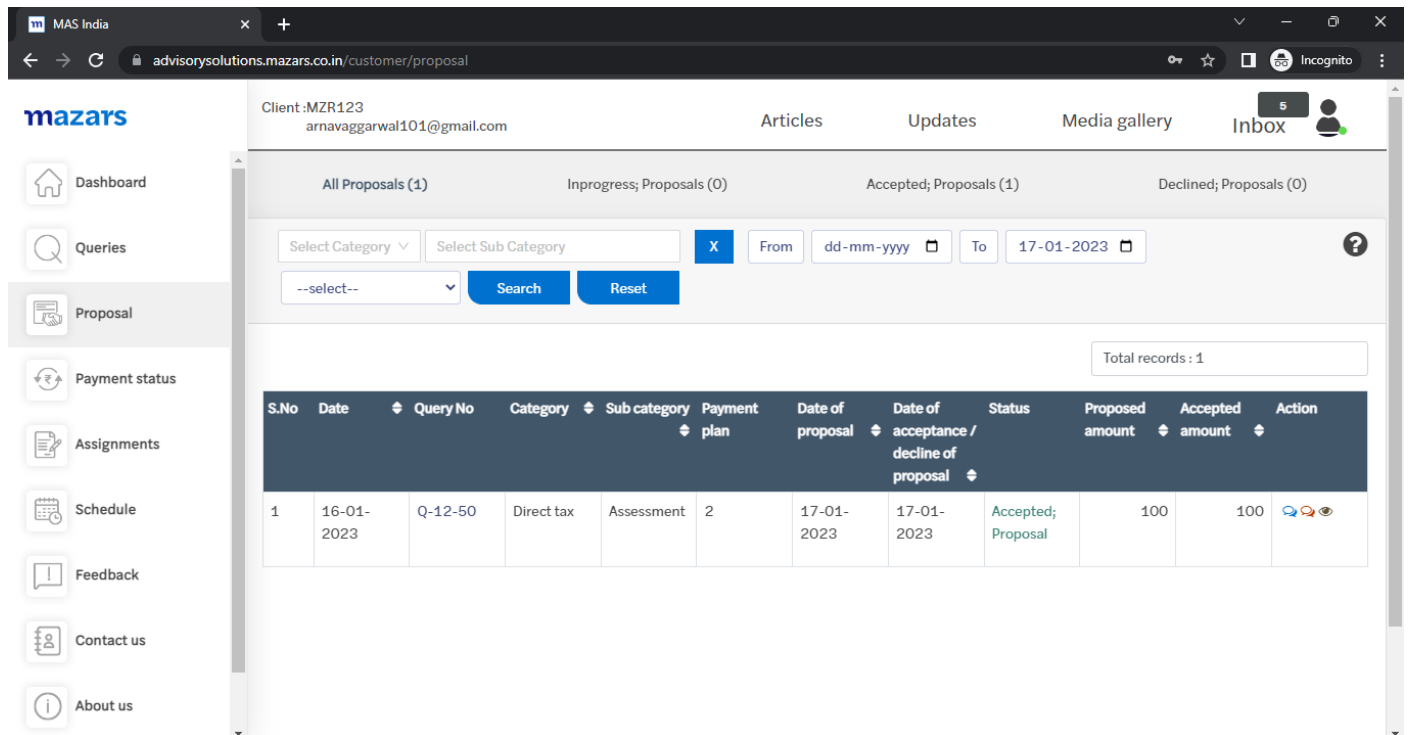
Total records : 1

S.No	Date	Query No	Status	Proposed amount	Accepted amount	Action
1	16-01-2023	Q-12-50	Accepted; Proposal	100	100	

Success

OK

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



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

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

--select-- Search Reset

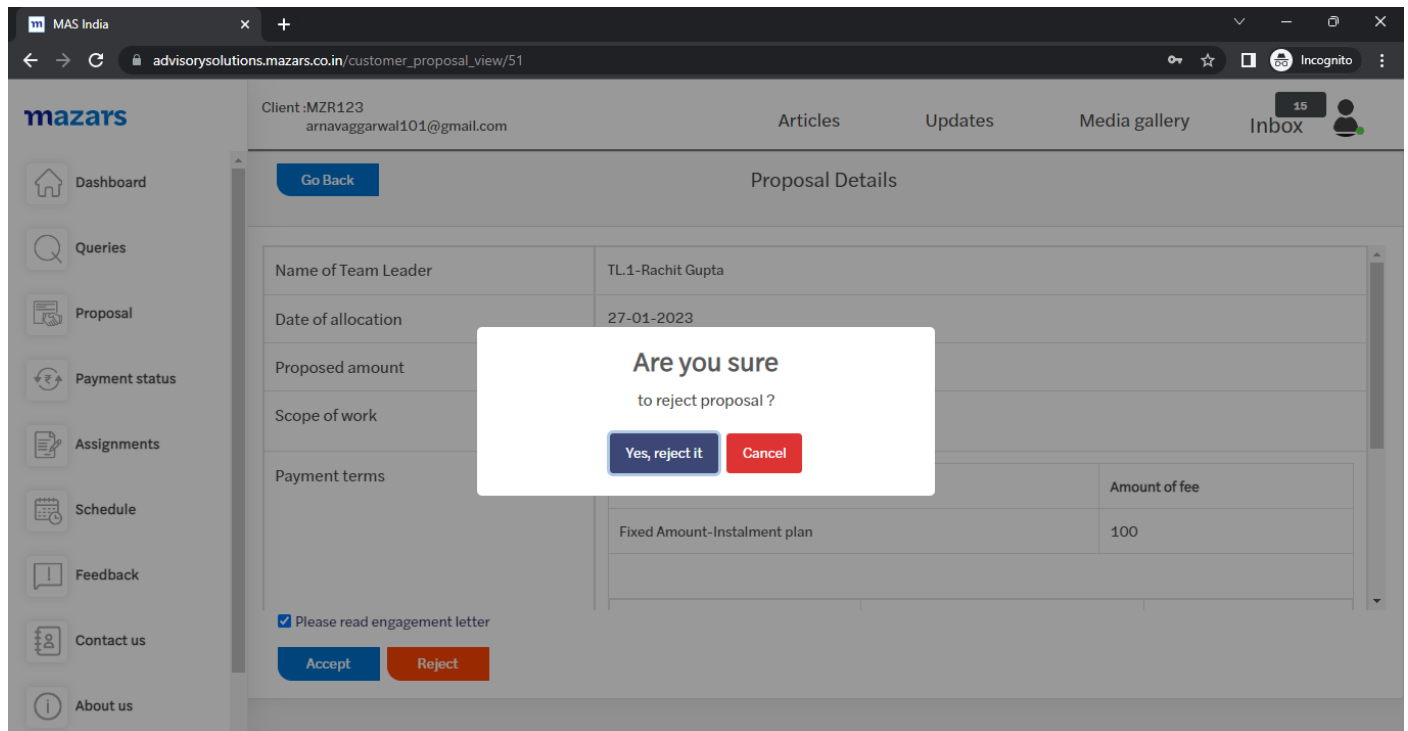
Total records : 1

S.No	Date	Query No	Category	Sub category	Payment plan	Date of proposal	Date of acceptance / decline of proposal	Status	Proposed amount	Accepted amount	Action
1	16-01-2023	Q-12-50	Direct tax	Assessment	2	17-01-2023	17-01-2023	Accepted; Proposal	100	100	👁

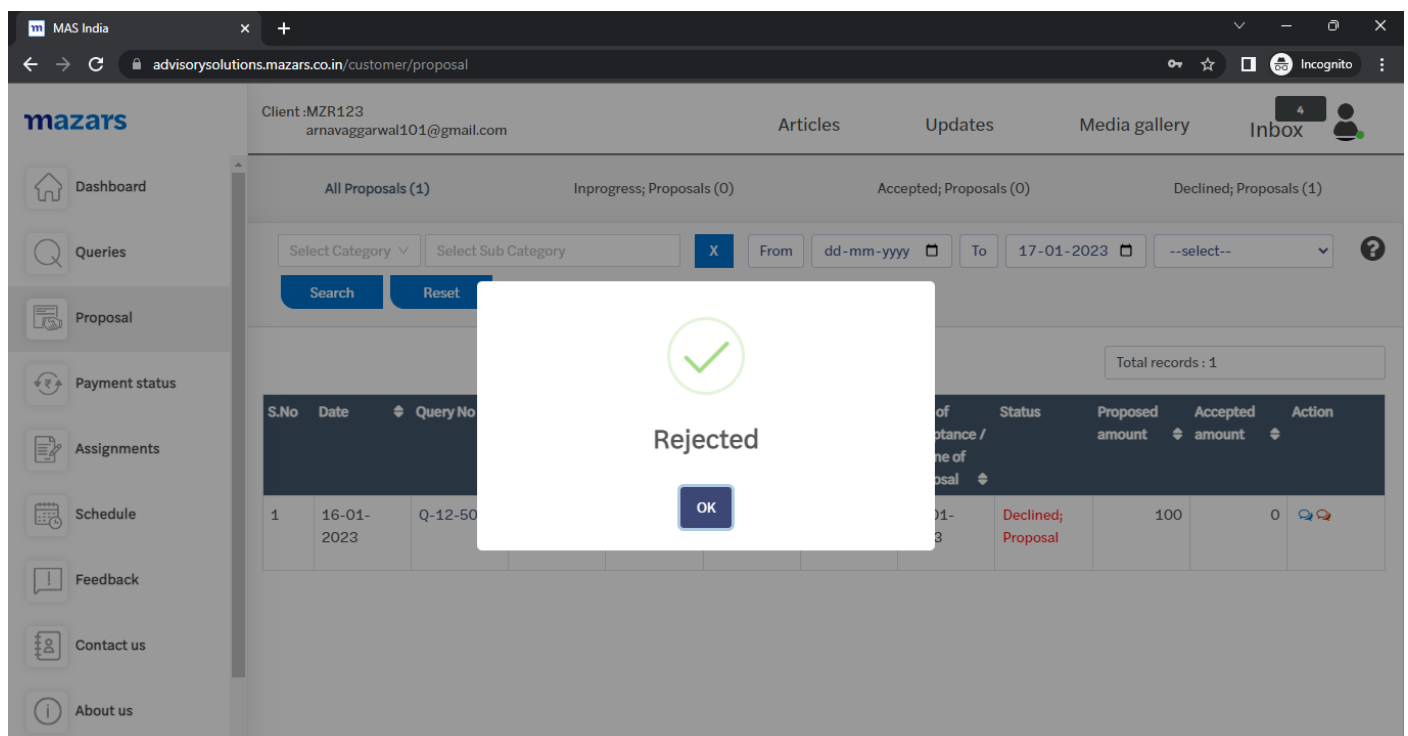


- By clicking on this icon, the client can view the engagement letter as accepted by him. His acceptance is also recorded on such engagement letter electronically.

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.

The screenshot shows the Mazars Advisory Solutions web application interface. The top navigation bar includes 'Articles', 'Updates', 'Media gallery', and 'Inbox'. The left sidebar contains various menu items: Dashboard, Queries, Proposal (highlighted), Payment status, Assignments, Schedule, Feedback, Contact us, and About us. The main content area displays the 'Proposal' tab for client MZR123 (arnavagarwal101@gmail.com). It shows a table of proposals with the following data:

S.No	Date	Query No	Category	Sub category	Payment plan	Date of proposal	Date of acceptance / decline of proposal	Status	Proposed amount	Accepted amount	Action
1	16-01-2023	Q-12-50	Direct tax	Assessment	2	17-01-2023	17-01-2023	Declined; Proposal	100	0	

The status 'Declined; Proposal' is highlighted in red. The 'Action' column contains a message icon.

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

This screenshot is identical to the one above, showing the Mazars Advisory Solutions web application interface. The top navigation bar includes 'Articles', 'Updates', 'Media gallery', and 'Inbox'. The left sidebar contains various menu items: Dashboard, Queries, Proposal (highlighted), Payment status, Assignments, Schedule, Feedback, Contact us, and About us. The main content area displays the 'Proposal' tab for client MZR123 (arnavagarwal101@gmail.com). It shows a table of proposals with the following data:

S.No	Date	Query No	Category	Sub category	Payment plan	Date of proposal	Date of acceptance / decline of proposal	Status	Proposed amount	Accepted amount	Action
1	16-01-2023	Q-12-50	Direct tax	Assessment	2	17-01-2023	17-01-2023	Declined; Proposal	100	0	

The status 'Declined; Proposal' is highlighted in red. The 'Action' column contains a message icon.

After examining the request, Mazars Advisory Solutions 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 :MZR123
arnavaggarwal101@gmail.com

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All Proposals (1) Inprogress; Proposals (1) Accepted; Proposals (0) Declined; Proposals (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	Payment plan	Date of proposal	Date of acceptance / decline of proposal	Status	Proposed amount	Accepted amount	Action
1	16-01-2023	Q-12-50	Direct tax	Assessment	2	17-01-2023	17-01-2023	Inprogress/Acceptance	100	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 :MZR123
arnavaggarwal101@gmail.com

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Go Back Query details

Basic query information Proposal Assignment Feedback Recording

Proposal and payment details

Titles	Data
Date of allocation	16-01-2023
Name of Team leader	TL1-Rachit Gupta
Name of Tax Professional(s)	
Date of proposal	17-01-2023 Download
Scope of work	Test Proposal.
Payment terms	<div>Payment plan</div> <div>Amount of fee</div>

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Query details

Basic query information Proposal Assignment Feedback Recording

Payment terms

Payment plan		Amount of fee
Fixed Amount-Instalment plan		100
No of installment	Installment amount	Due dates
4	25	24-01-2023
	25	27-01-2023
	25	31-01-2023
	25	03-02-2023

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Query details

Basic query information Proposal Assignment Feedback Recording

Proposed amount	100				
Proposal status	Accepted				
Amount accepted	100				
Date of acceptance / decline	17-01-2023				
Payment history	Date	Invoice amount	TDS deducted	Amount paid	Payment receipt
Payment received	0				
Payment overdue	0				

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Query details

Basic query information

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Payment history	Date	Invoice amount	TDS deducted	Amount paid	Payment receipt
Payment received	0				
Payment overdue	0				
Payment outstanding	0				
Reasons for proposal decline	NA				
Date of restoring proposal	30-01-2023				
Reason of restoring proposal	On client request, the proposal has been 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 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>	