



SUVIT

ACCOUNTING AUTOMATION SOFTWARE



Internal Guide

Prof. Jatayu Baxi,
Assistant Professor,
CE Department,
Dharmsinh Desai University, Nadiad.

- PRINCY GAJERA (19CEUOS157)



External Guide

Mr. Kalpesh Zalavadiya,
Project Manager,
CTO,
Suvit Fintech.

ABOUT COMPANY



Suvit is a universal platform for the integration of various accounting and tax programs into a single office environment. The platform offers an accounting automation solution that reduces clerical and manual tasks and enables better communication, collaboration, and opportunities to work on futuristic approaches.



Suvit uses an architecture that facilitates tax experts of the country & integration with government portals. This enables swift movement of data, and ease of creating a centralized repository. The solution results in massive time savings and an increase in process efficiencies.

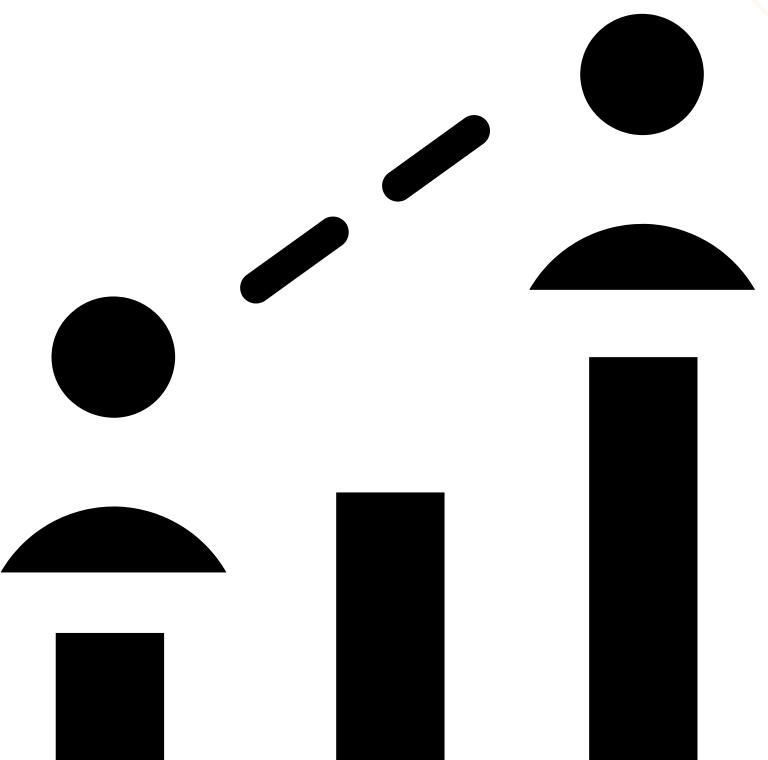


Suvit

WHAT IS ACCOUNTING AUTOMATION?

It is a process of automating day-to-day clerical and repetitive accounting tasks such as data entries, reconciliation, voucher entries, tax filing, etc with the help of advanced technologies like Artificial Intelligence and Machine Learning.

Third-party software or tools performing all these tasks is known as accounting automation software.



TOOLS AND TECH

NodeJs
ReactJs
Express
ExcelJs

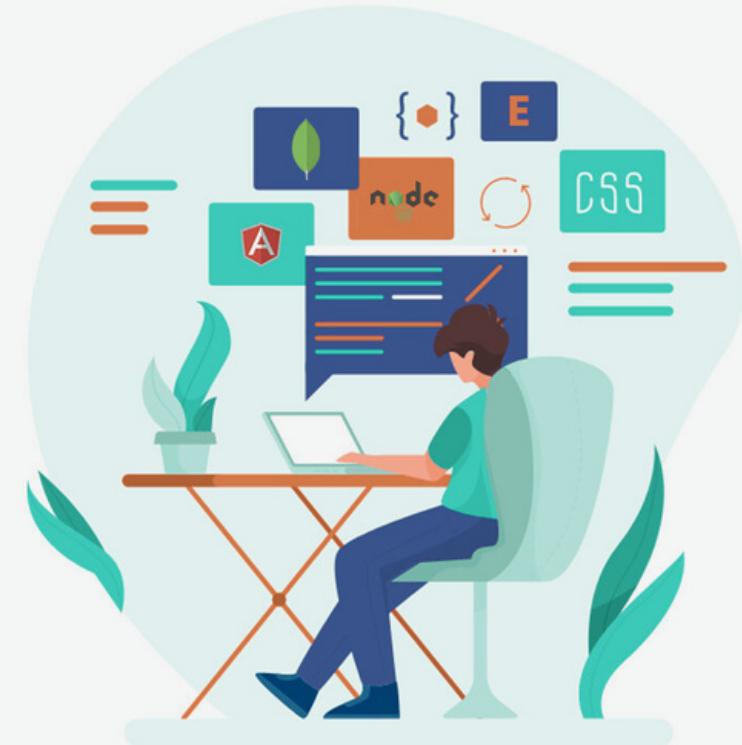
TECH'S

GitLab
Git
VsCode

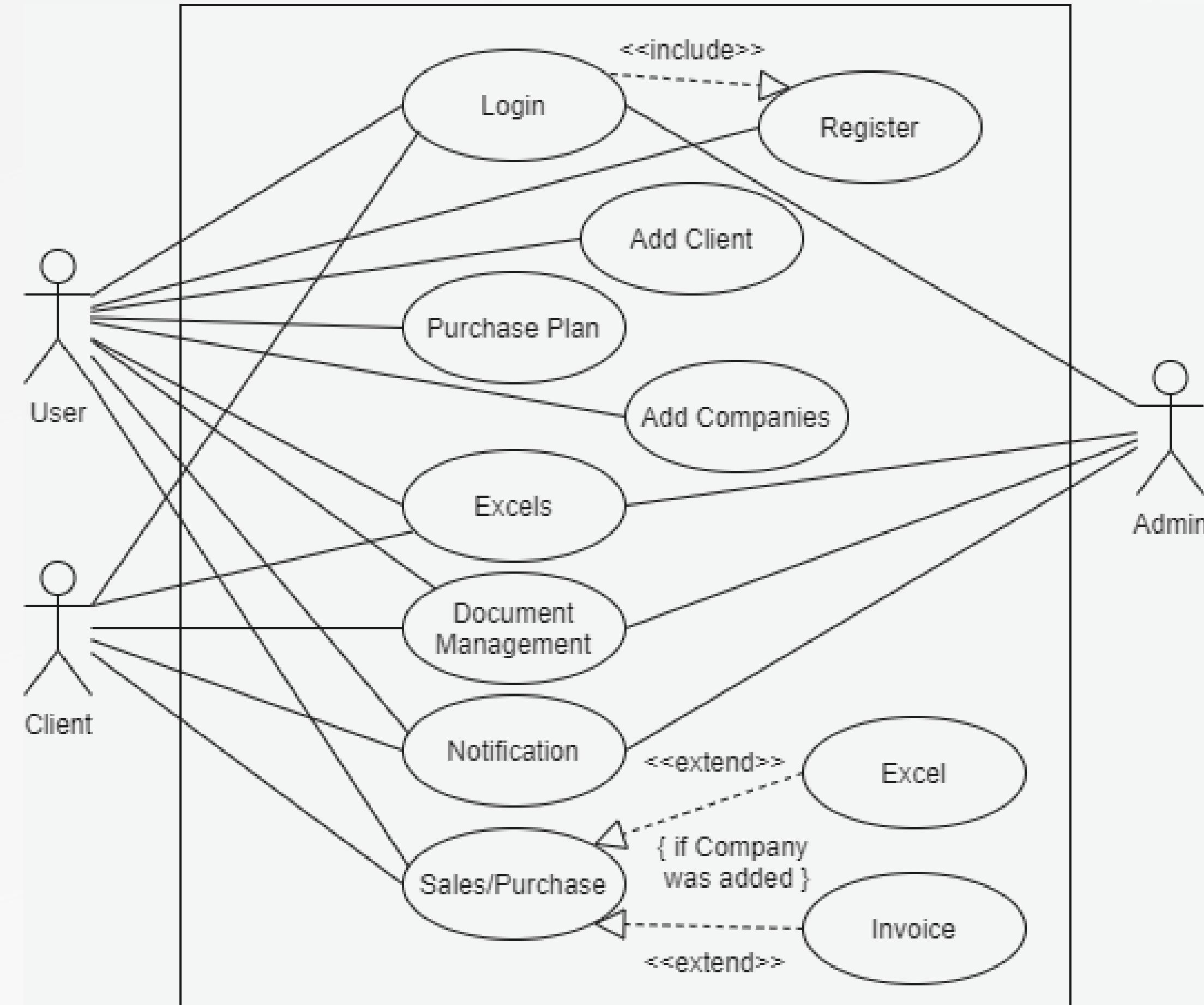
TOOLS

MongoDB

DATABASE

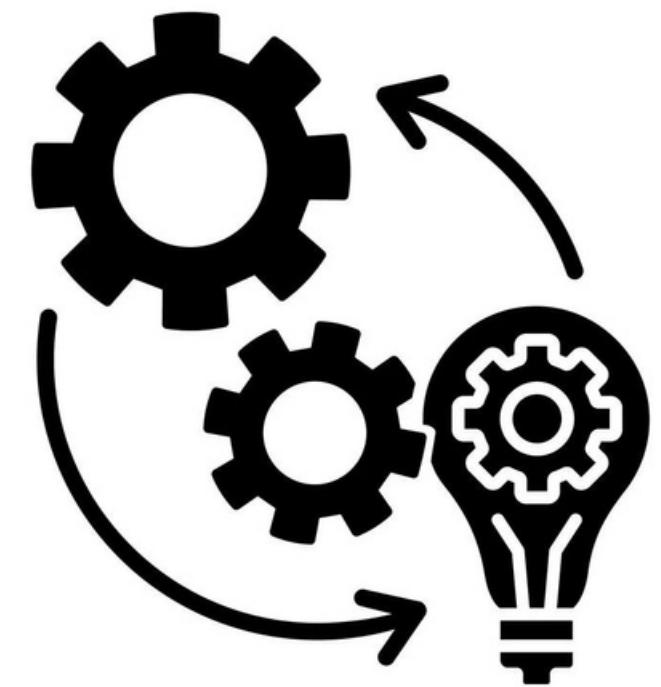


USE CASE DIAGRAM



IMPLEMENTATION

- 01** DOCUMENT PROCESSING
- 02** USER MANAGEMENT
- 03** NOTIFICATIONS
- 04** HUBSPOT
- 05** SPLIT COMPANY
- 06** INTERCOM



1. DOCUMENT PROCESSING

A	B	C	D
1	Value Date	Transaction Remarks	Withdrawal Amount (INR) Deposit Amount (INR)
2	44925.63013	EBA/Int NSEMTF2020	13.02
3	43923	MMT/IMPS/00931810666	0 23000 . 0
4			0
5		EBA/Int NSEMTF2020041	13.82
6		EBA/Int NSEMTF2020041	0 13.82
7	06/04/2020		13.82
8	06/04/2020		0
9	07/04/2020	EBA/Int NSEMTF2020041	13.82
10			0
11		CMS/000634116836/ADCAAMSICICI_DSP MUTUAL FUND	
12	07/04/2020	EBA/EM CTD 070420/20:	-11414924
13	07/04/2020		
14	07/04/2020	EBA/NSEMGRGNPIPO/20200407203312	
15	07/04/2020	EBA/EM CTD 070420/20:	1414924
16			27174.57
17		EBA/NSE N 2020067/202	27174.57
18			14924
19			13.82
			0
			3714.88
			329.24
			8107.81

Excel Sheet Uploaded by User

- In Suvit, Users can upload their data in any format like Excel, PDF, or scanned PDF.
- If a user uploads a PDF or scanned PDF, automatically converts into an Excel sheet with proper format and headers.
- Sometimes users upload the wrong data format or have some unnecessary data.
- For the further processing of those sheets, we need to clean up them, extract all the necessary fields from them, and create a new sheet.

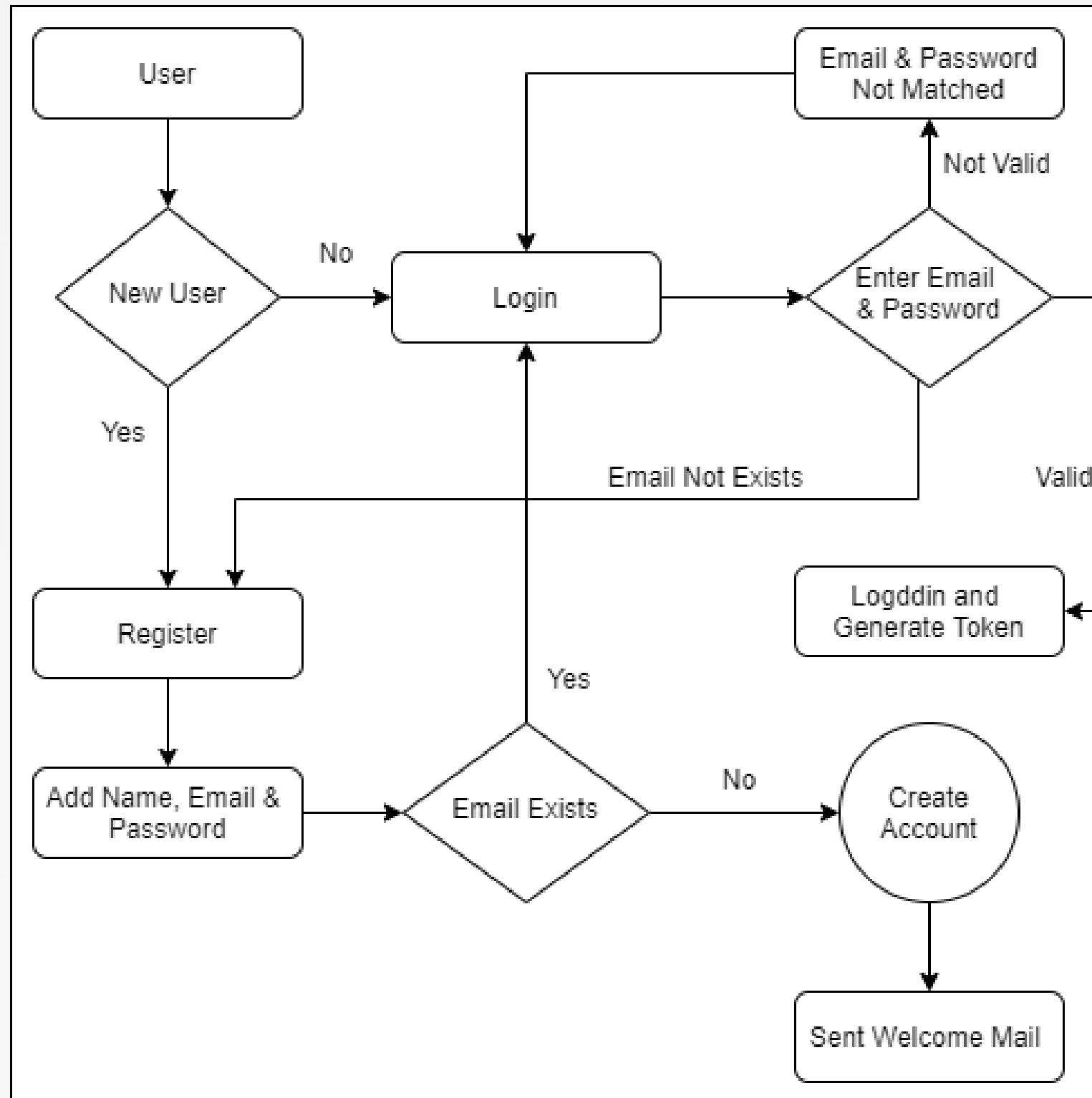
TESTING

Row Number	Reason	Add/Skip
2,5,6	Date Modified/Added	Add
4,10,11,13,14	Insufficient Data	Skip
7,8	Narration Added	Add
15,16,19	Both Credit & Debit Field	Skip
17,18	Date & Narration Added	Add

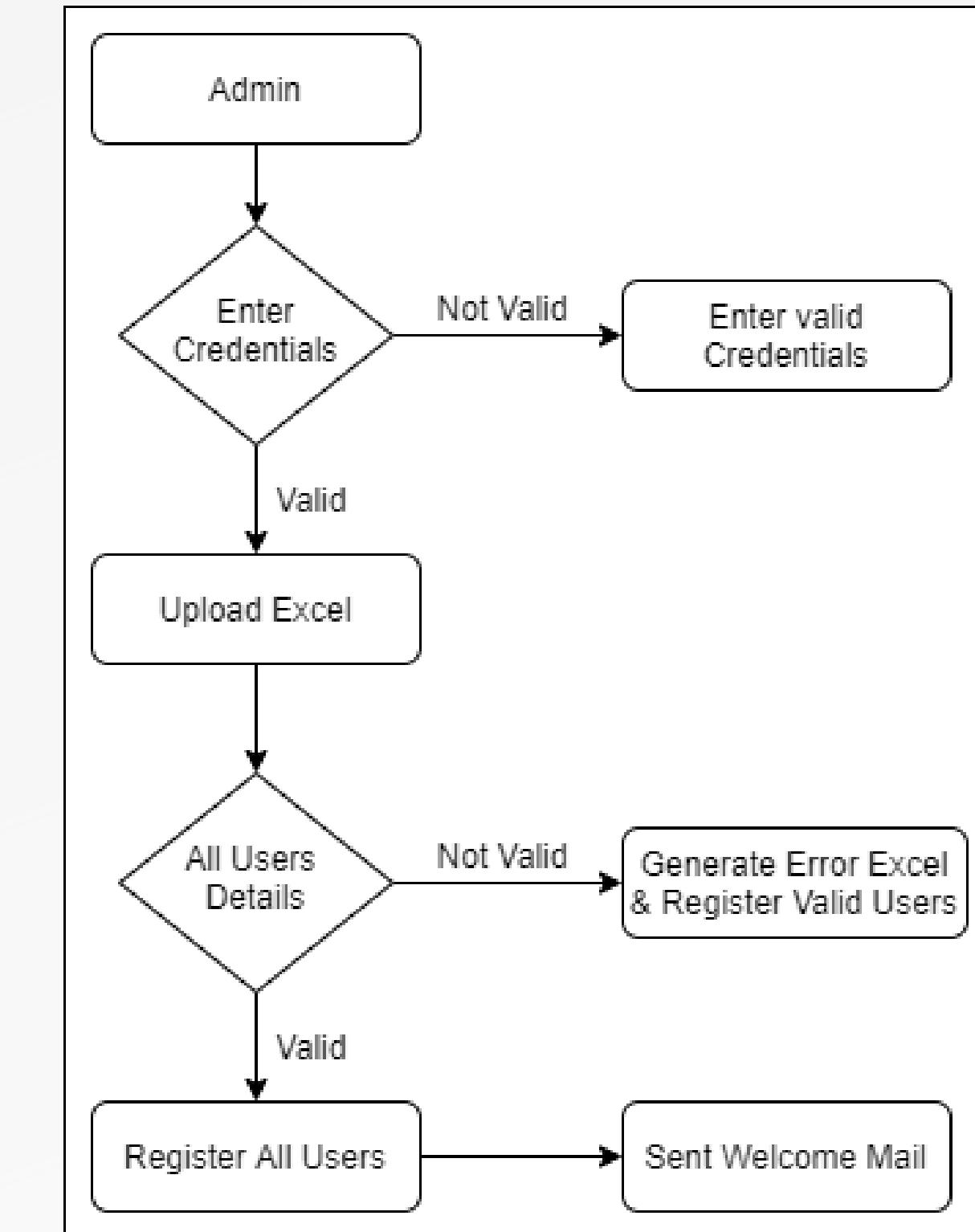
1	date	description	type	amount
2	30-12-2022	EBA/Int NSEMTF20200331/202004021	debit	13.02
3	02-04-2020	MMT/IMPS/009318106668/Rent April	credit	23000
4	02-04-2020	EBA/Int NSEMTF20200402/202004030	debit	13.82
5	02-04-2020	EBA/Int NSEMTF20200403/202004041	credit	13.82
6	06-04-2020	XXX	debit	13.82
7	06-04-2020	XXX	credit	13.82
8	07-04-2020	EBA/Int NSEMTF20200406/202004070	debit	13.82
9	07-04-2020	EBA/EM CTD 070420/20200407222111	credit	11414924
10	07-04-2020	XXX	debit	13.82
11	07-04-2020	XXX	credit	3714.88
12				

Generated Excel
after Processing

2. USER MANAGEMENT



User Flowchart



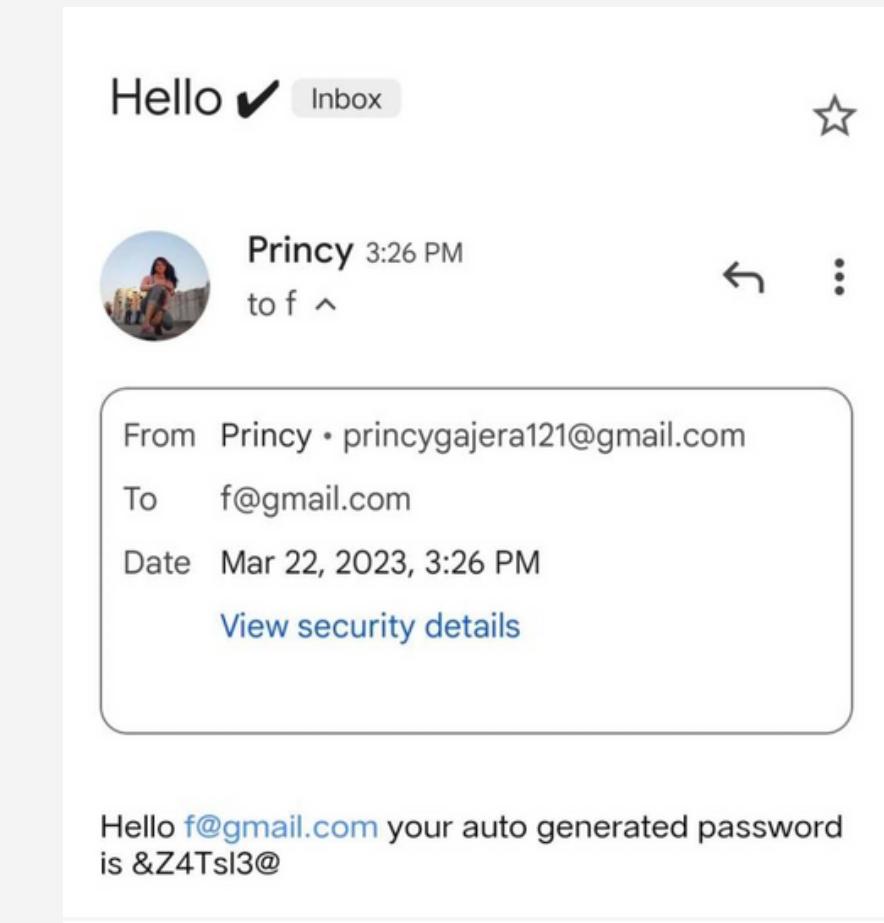
Admin Flowchart

TESTING

A	B
1 name	email
2 f	f@gmail.com
3 g	g@gmail.com

Admin Upload Excel
with Users Details

Users receive a Welcome
mail with an Auto-
generated password



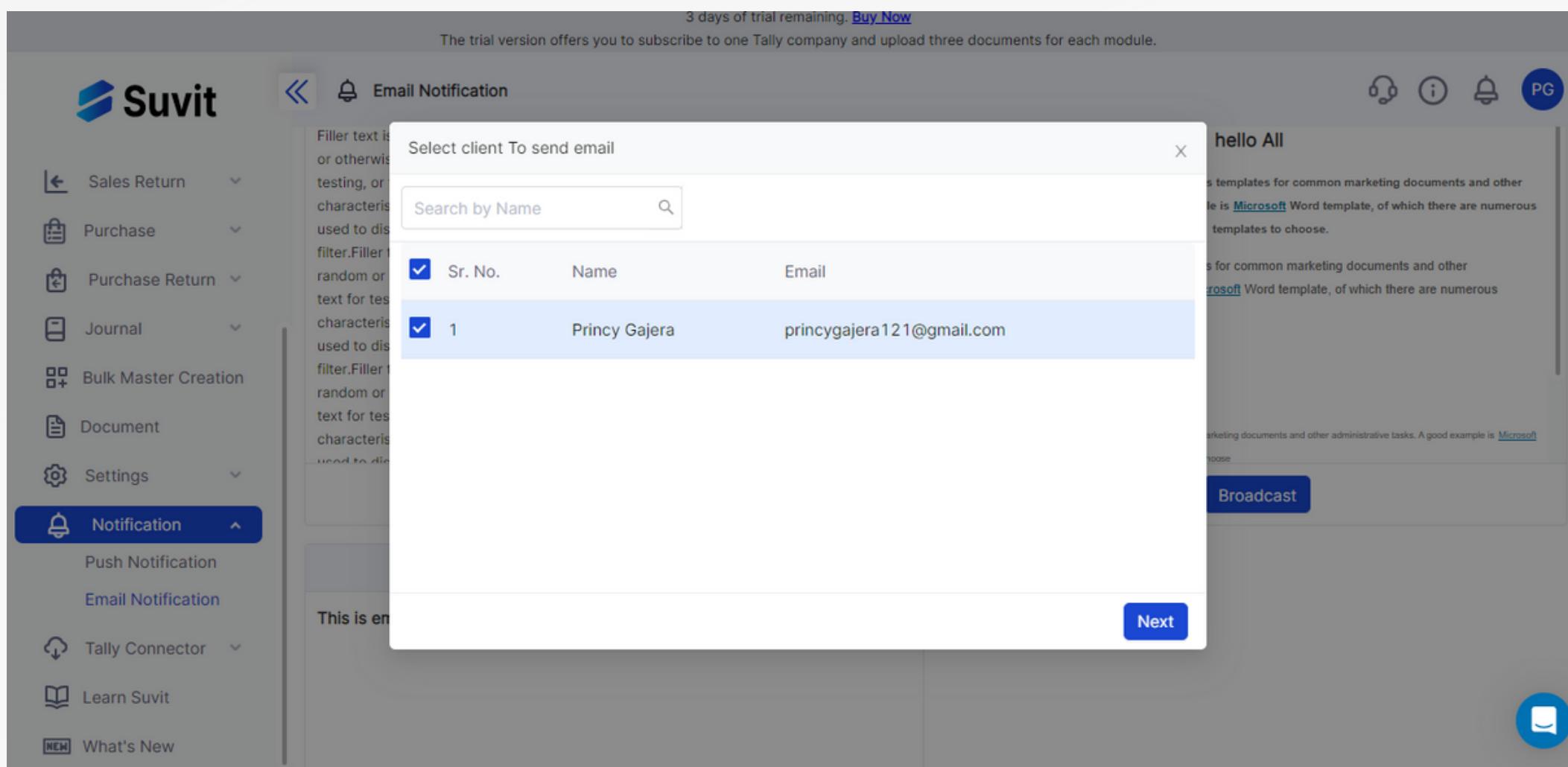
A	B
1 name	email
2 a	a@gmail.com
3 b	

A	B	C
1 name	email	ErrorLog
2 a	a@gmail.com	
3 b		{"email":"Email field is required"}

Uploaded Excel & Generated Excel with error logs

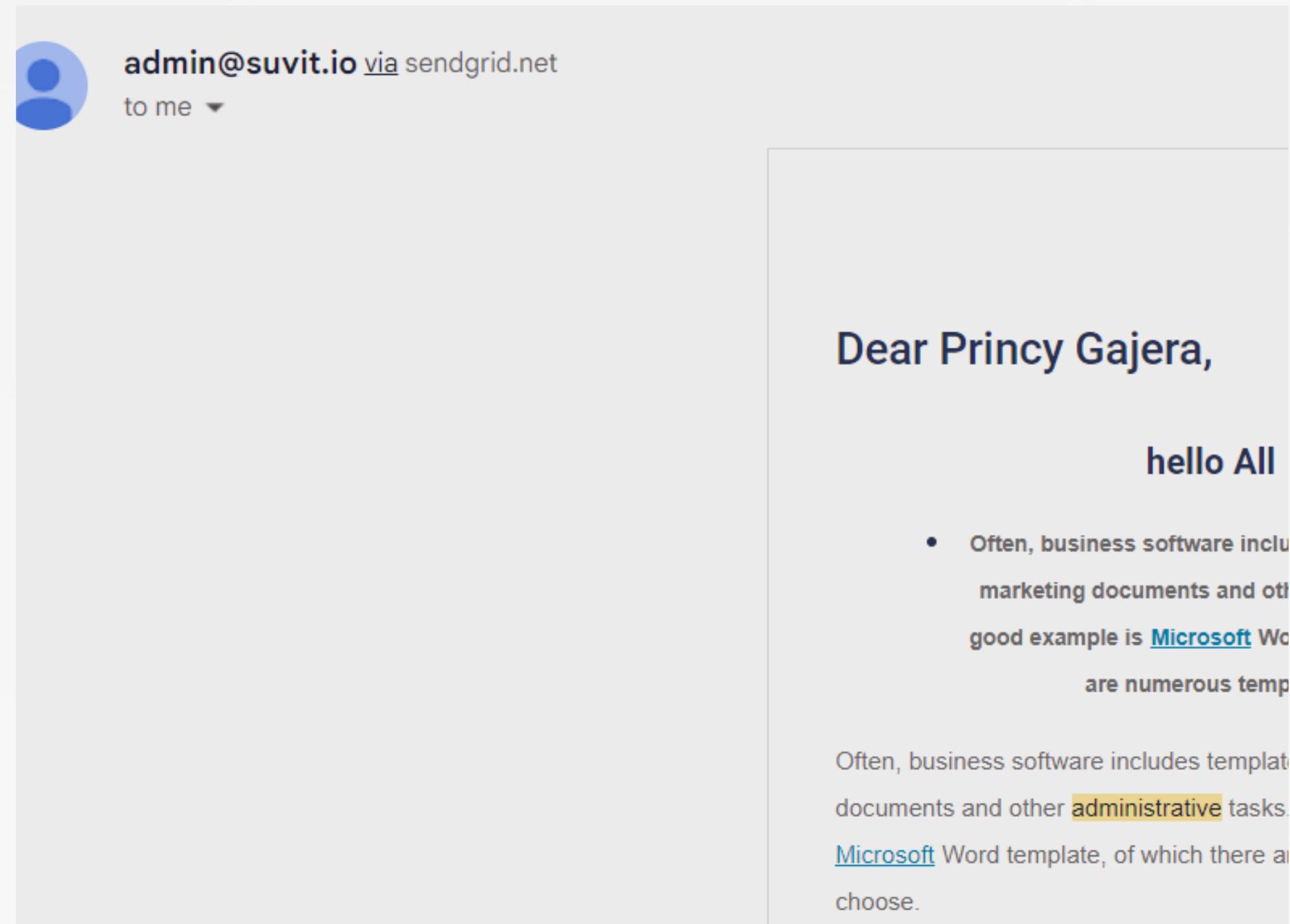
3. NOTIFICATIONS

- In Suvit, we have two types of customers primary and secondary.
- When Primary customers want to send some message to their secondary customers, they can directly connect with them by using push notifications and the email service of the suvit app.



Select a template & Select Clients to Send Mail

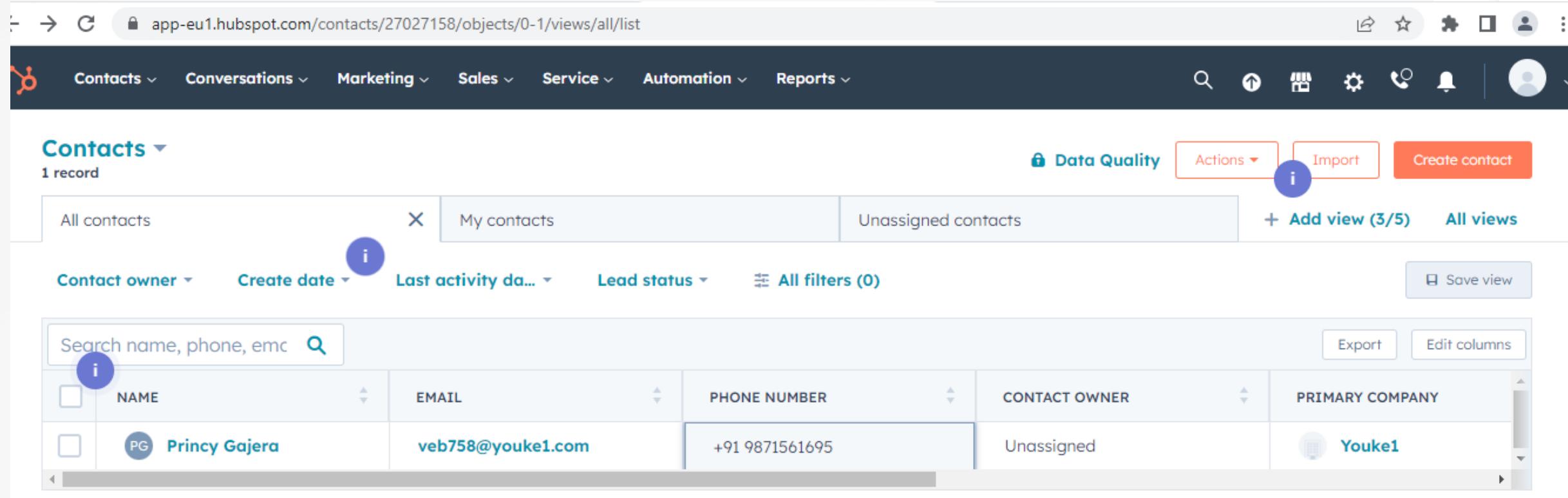
TESTING



Client Receive Mail sent by the Primary User

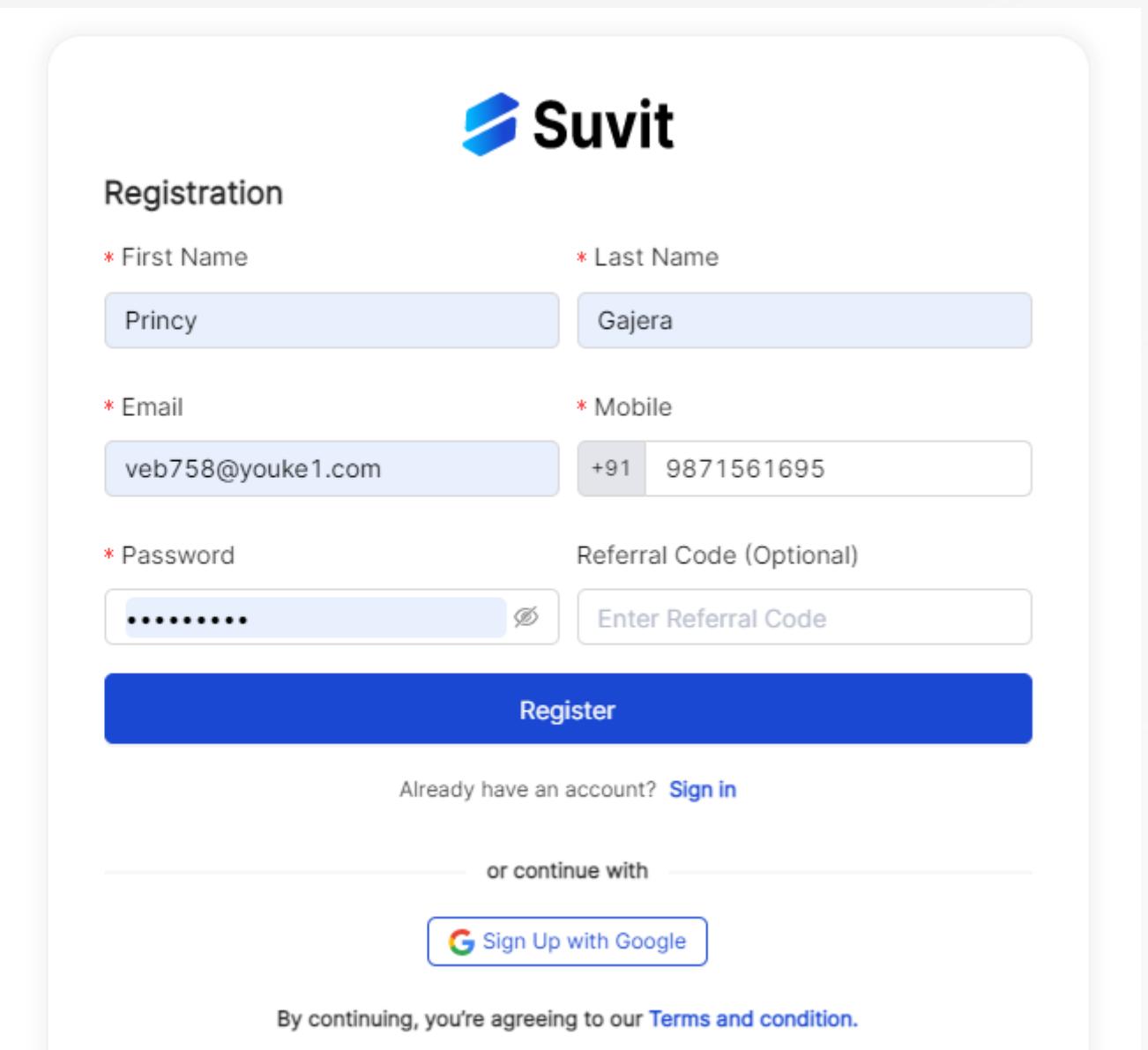
4. HUBSPOT

- HubSpot is a tool that seamlessly connects your data, teams, and customers on one CRM platform that grows with a business. We integrate Suvit with HubSpot.
- We add all the contacts and companies to HubSpot. Whenever users register to the website, we add their details to the HubSpot in our contact list.



The screenshot shows the HubSpot Contacts page with a single record listed. The contact is named "Princy Gajera" with the email "vbe758@youke1.com" and phone number "+91 9871561695". The contact is assigned to "Unassigned" and is associated with the company "Youke1". The page includes various filters and search options at the top, such as "Data Quality", "Actions", "Import", and "Create contact".

NAME	EMAIL	PHONE NUMBER	CONTACT OWNER	PRIMARY COMPANY
PG Princy Gajera	vbe758@youke1.com	+91 9871561695	Unassigned	Youke1



The registration form for Suvit shows fields for First Name ("Princy"), Last Name ("Gajera"), Email ("vbe758@youke1.com"), Mobile ("+91 9871561695"), Password ("....."), and Referral Code (Optional). There is also a "Sign Up with Google" button and a link to "Terms and condition".

First Name	Last Name
Princy	Gajera
Email	Mobile
vbe758@youke1.com	+91 9871561695
Password	Referral Code (Optional)
.....	Enter Referral Code

TESTING

- When users purchase any plan from Suvit and become Live customers from trial or expired one, add their company details to the HubSpot company list.

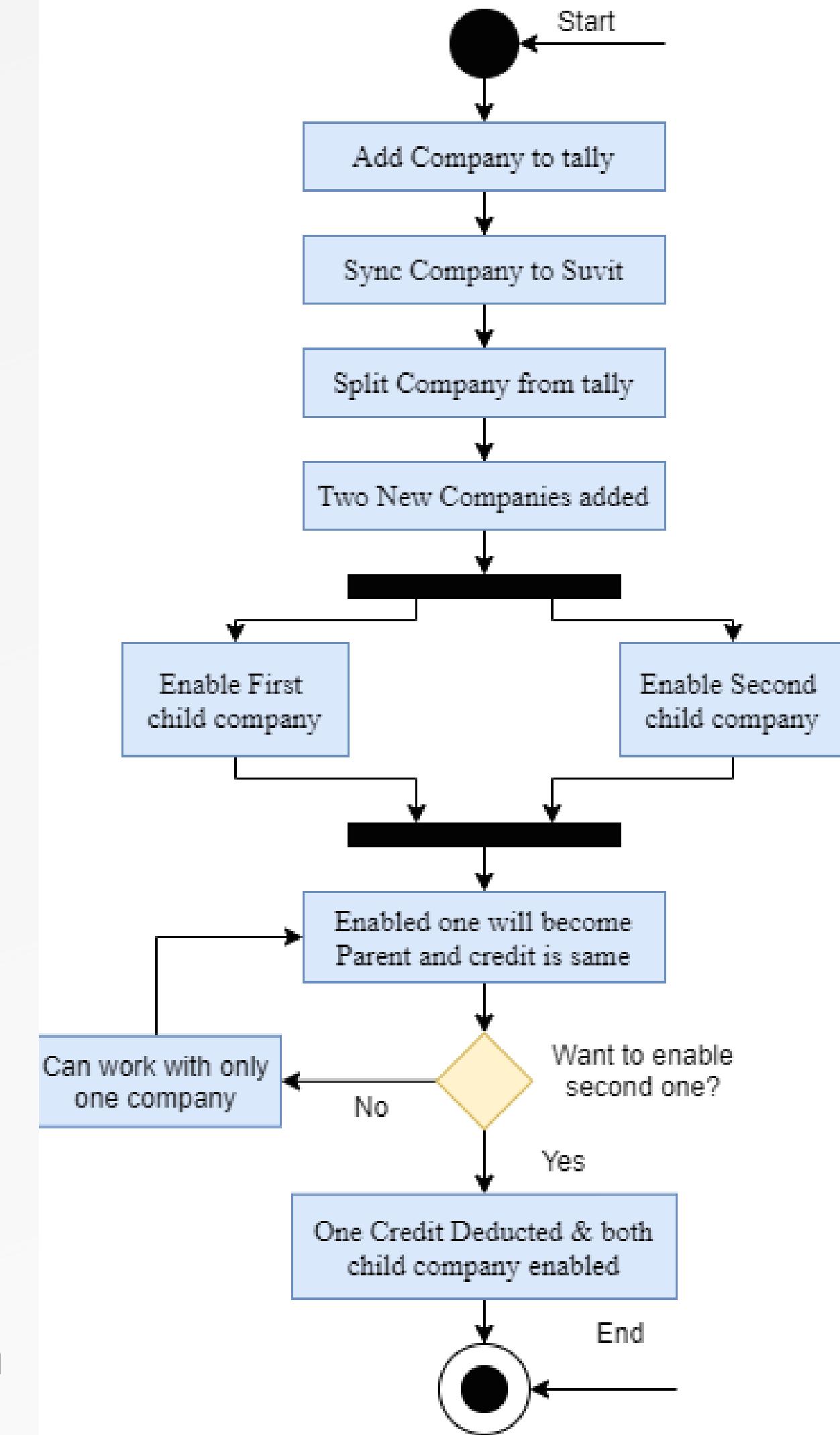
The screenshot shows the Suvit platform interface. At the top, there are navigation links: Purchase Return, Journal, Bulk Master Creation, Document, Settings (selected), My Profile, My Plan, User Management, Role Management, Client Management, Notification, Tally Connector, Learn Suvit, and What's New. Below the navigation, it says "You have 9 unused credits and they will expire on 13/03/2024." There are four tabs: Company (1/10), User (1/3), Invoice (0/200). A section titled "Buy Add-On Service" shows "Add User" with fields for "Total User" (Enter user) and "Total Amount" (₹ 0), with a "Make a Payment" button. Below this is a "View Payment History" section. At the bottom, there are four plan options: BASIC (₹ 2000/year, billed yearly), STANDARD (₹ 5000/year, billed yearly, highlighted with a green triangle labeled "Your Plan"), PREMIUM (₹ 12000/year, billed yearly), and ENTERPRISE (₹ 25000/year, billed yearly).

The screenshot shows the HubSpot Companies list view. The URL is app-eu1.hubspot.com/contacts/27027158/objects/0-2/views/all/list. The top navigation bar includes Contacts, Conversations, Marketing, Sales, Service, Automation, and Reports. The Companies section shows 1 record. It has filters for Company owner, Create date, Last activity date, Lead status, and All filters (0). A search bar at the top allows searching by name, phone, or email. The main table lists companies with columns: COMPANY NAME, COMPANY OWNER, CREATE DATE, PHONE NUMBER, and LAST ACTIVITY DATE (GMT+5:30). The first company listed is Youke1, owned by Princy hubspot (prencygajera121@gmail.com), created on Mar 13, 2023, with phone number +91 98715-61695 and last activity date as --. Buttons for Actions, Import, and Create company are available at the top right of the table. Pagination at the bottom shows page 1 of 25 per page.

5. SPLIT COMPANY

- The feature in Tally allows users to split a company into two separate companies to manage large amounts of data. The two new companies have the same name as the parent company, covering different periods of the financial year.
- To enable the new companies, users must subscribe to them, and each company has one credit. Enabling the first child company does not deduct a credit, but enabling the second child company deducts one credit.

Activity Diagram



TESTING

Search by Company Name/ID (3 selected) You have 493/500 unused credits + Add Companies Sync Company Getting Started

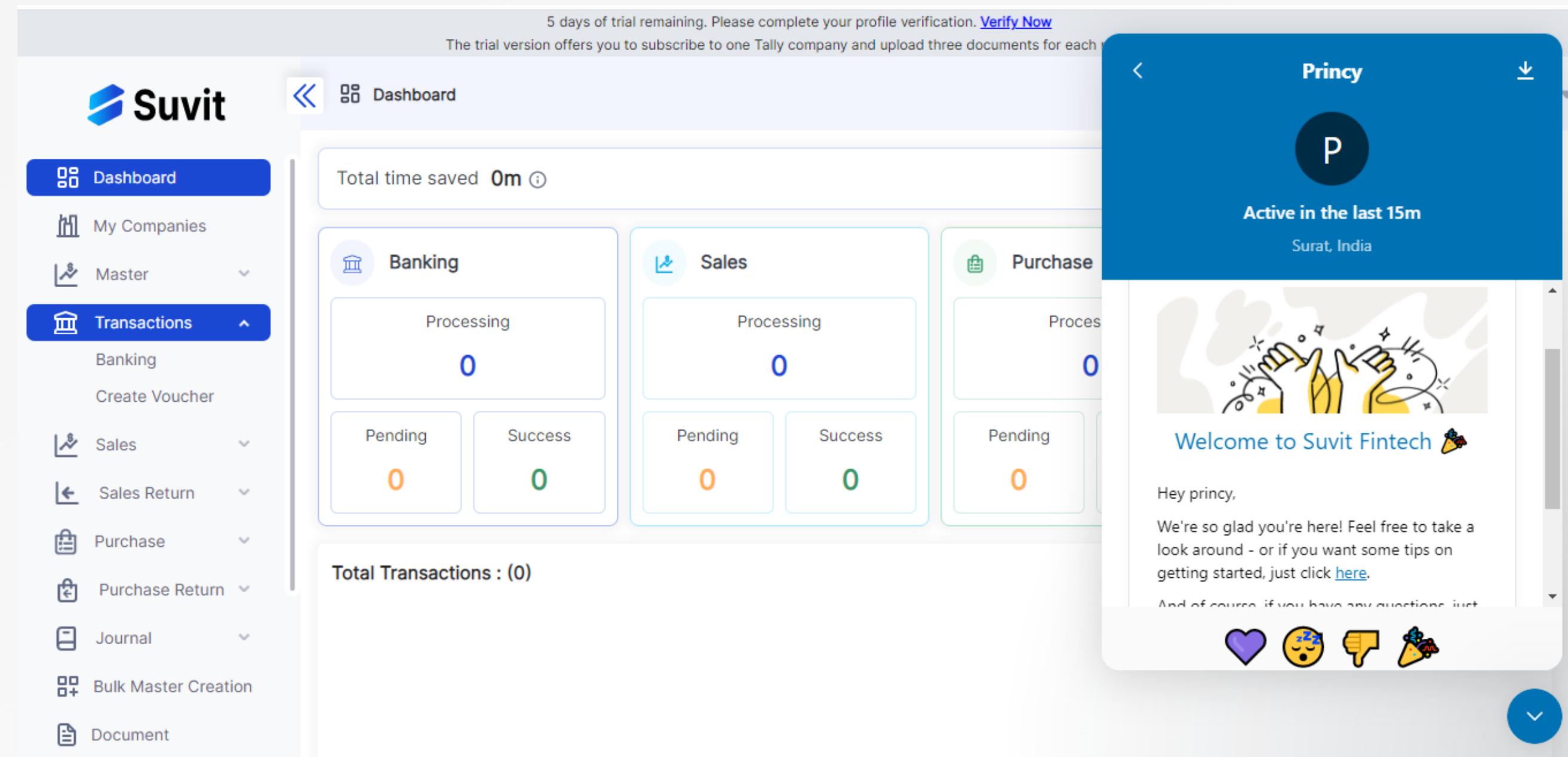
Sr. No.	Name	Last Sync Date	Completed	Transactions	Saved Hours	Parent	Status	Client	Integration	Action
1	Split2(10038)	-	0	0	0m	-	Enable	-	Tally	⋮
2	Split2 - (from 1-Sep-22)(10040)split	-	0	0	0m	10038	Disable	-	Tally	⋮
3	Split2 - (from 1-Apr-22)(10039)split	-	0	0	0m	10038	Disable	-	Tally	⋮
4	S1(10033)	-	0	0	0m	-	Enable	-	Tally	⋮

Search by Company Name/ID (3 selected) You have 492/500 unused credits + Add Companies Sync Company Getting Started

Sr. No.	Name	Last Sync Date	Completed	Transactions	Saved Hours	Parent	Status	Client	Integration
1	Split2(10038)	-	0	0	0m	-	Enable	-	Tally
2	Split2 - (from 1-Apr-22)(10039)split	-	0	0	0m	10038	Disable	-	Tally
3	Split2 - (from 1-Sep-22)(10040)split	-	0	0	0m	10038	Enable	-	Tally
4	S1(10033)	-	0	0	0m	-	Enable	-	Tally

6. INTERCOM

- Intercom is an AI automation tool, that provides messenger, chats, and many more services.
- It powers customer communications, delivering conversions, customer engagement, and personalized support. The Messenger is the heart of this strategy.



CONTINUE...

Outbound

- Messages ▼
 - All
 - Chats
 - Posts
 - Emails !
 - Custom Bots
 - Product Tours
 - Tooltips
 - Banners
 - Mobile Push
 - Mobile Carousels
 - SMS
 - Surveys
 - Checklists New
 - Series
 - News >
 - Settings >

All messages

+ New message

Search...

Audience is Any | Visitors, Leads, or Users | State is Any | Sender is Any | Tag is any | Subscription type is any + Add filter

8 messages

Message	Status	Sender	Type	Count
SignIn tooltip	Live	Tooltip group	2	
Launch a new feature	Live	Princy Gajera	Tour	1
Welcome and onboard new users	Live	Operator	Bot	2
welcome checklists	Live	Princy Gajera	Checklist	2
welcome	Live	Princy Gajera	Chat	2
welcome post	Live	Princy Gajera	Post	3
welcome	Live	Ankit Virani	Banner	

Intercom Dashboard

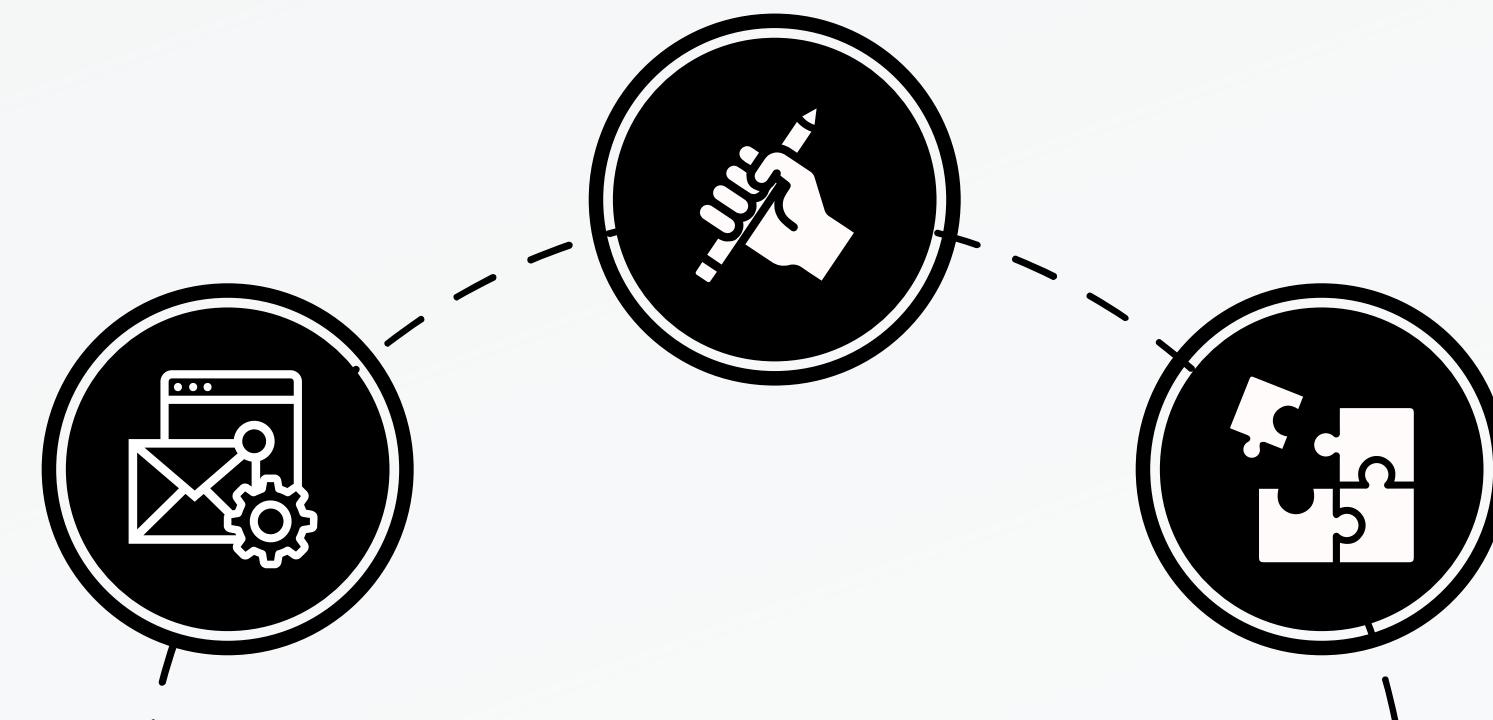
CONCLUSION

In summary, Suvit is a platform designed to integrate various accounting and tax programs into a single office environment. With its advanced technologies such as Artificial Intelligence and Machine Learning, Suvit aims to shorten the data life cycle for a better response and bridge the gap between taxation, accounting, banking, and professionals. The platform offers an accounting automation solution that reduces clerical and manual tasks and enables better communication, collaboration, and opportunities to work on futuristic approaches.



FUTURE EXTENSIONS

- Document Processing: Add OCR feature to scan documents and retrieve the required information.
- Notifications: we have a plan to introduce SMS and WhatsApp services for users.
- HubSpot: we will add Primary Associations to the company.
- Intercom: Add surveys in Messenger.



BIBLIOGRAPHY

Platforms

<https://www.intercom.com/>

<https://www.hubspot.com/>

<https://onesignal.com/>

<https://www.mailinator.com/>

<https://www.postman.com/>

References

<https://www.mongodb.com/>

<https://www.passportjs.org/>

<https://www.npmjs.com/package/bcryptjs>

<https://nodemailer.com/about/>

<https://jwt.io/>



THANK YOU!

Any Question?

