



# OFFICE MANAGEMENT

BY C A R S BIYANI



WHY IT IS  
NEEDED



SAVE TIME &  
COST



INCREASE  
PRODUCTIVITY



ULTIMATE  
GROWTH



PEACE &  
BALANCE OF LIFE



WHAT IS OFFICE  
MANAGEMENT?

# What is office Management?

Time

Team

Task

Technology

File

Client

Pillars of Office  
Management?

# 1) TIME MANAGEMENT RB4



What is Time Management?



Unproductive Work ↓



Productive Work ↑

# UNPRODUCTIVE TIME/WORK

Kaam Bhool  
Gaye

Unplanned Task  
Management  
without knowing  
priority

Client  
demanding 3  
Years ITR/GST  
Returns

Slow Internet

Staff on leave &  
client came for  
queries or all queries  
not at one place  
may it be  
offline/online

DSC expired  
while uploading  
returns or  
renewal of DSC

Staff ask contact  
of Client for  
follow up &  
given 2 days

Not getting  
Timely reminder  
for things to do

# PRODUCTIVE TIME/WORK

Plan late evening  
& Start work  
early Morning

Minimum Efforts  
& Maximum  
Productivity  
(Smart Work)

Timely Legal  
Compliance  
reduce further  
notice reply  
work

Maximum Task  
Checklist

Proper Use of  
Whatsapp

Online Meeting  
with client  
instead of  
Offline

In Boring Time,  
do interesting  
Work or search  
New things

Make habit of  
Notepad & Small  
things which  
takes more time  
of your team

RB5

RB6

## 2) TEAM MANAGEMENT

What is Team  
Management?

Higher  
Productivity

Motivation

RB9

# Higher Productivity

SET PROCESS,  
FOLLOW/REVIEW/  
UPDATE  
PROCESS(SOP)

BALANCING OF  
WORK BETWEEN  
TEAM MEMBERS

RIGHT TASK WITH  
RIGHT TEAM  
MEMBERS

FOLLOW UP

DELEGATION



# Motivation

FREEDOM WITH  
CONTROL

WEEKLY/MONTHLY  
MEETING TO DISCUSS  
PROBLEMS &  
SOLUTIONS

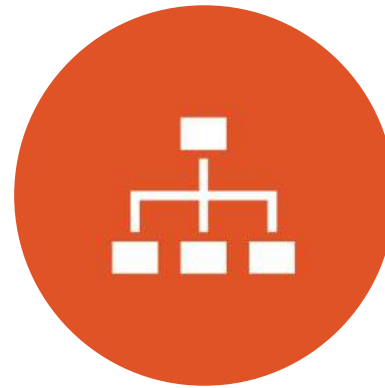
LOW ATTRITION

TIMELY TRAINING &  
UPDATES

PROPER TEAM SIZE

RB10

# 3) TASK MANAGEMENT



TASK MANAGEMENT MEANS COMPLETE  
CONTROLLING OF PROFESSIONAL &  
PERSONAL TASKS



KNOW  
PRIORITY OF  
THE TASK



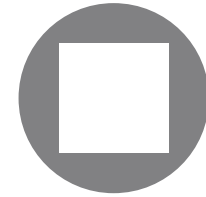
ALL REQUIRED  
FILES AT A  
SINGLE  
LOCATION



FINISH  
RELATED TASK  
ONCE AND ALL



TIMELY  
REMINDER FOR  
ACTIONS



FILTRATION AS  
PER OUR  
REQUIREMENT

RB14

RB15

# Task Management

# 4) TECHNOLOGY MANAGEMENT

RB18

Technology means anything which can save our time/cost, increase productivity or smooth work process.

# Important things

Security

Simplicity (Easily  
Understood to  
Anyone)

Support

But you have to start  
and Try for New  
Change is the life

Essential/Optional  
Softwares

High Speed  
Computers (SSD),  
RAM, High Speed  
Internet etc

RB19

RB20

RB21

RB22

## ESSENTIAL/USEFUL SOFTWARES/HARDWARE FOR CA OFFICE

One Drive  
(Online Cloud  
Backup)

CAServe.in  
(Office  
Management  
Tool)

Zoom/Microsoft  
Teams/Google  
Meet (Online  
Meeting)

Small PDF/PDF  
Converter

Advanced MS  
Office (Excel,  
Word)

Tally Prime

Google  
Keep/One Note  
(Notepad)

Google Forms  
(Online Client  
Data Collection)

Lastpass  
(Remember  
Password)

SMS Organiser  
(Microsoft)

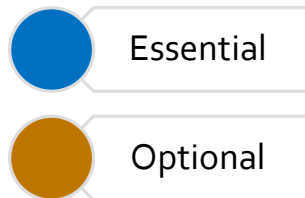
AnyDesk/Team  
Viewer

Office Lens  
(Mobile Scan by  
Microsoft)

Karmse (Reminder  
& Group  
Management)

Canon Scanner

Brother Back to  
Back Printer



Winzip



What is Model File Folder Structure?



Right Time, Right file within no time RB24



Scanning Option is the best RB23 RB26



Security RB25

# File Management

# Model Computer File/Folder Structure

Audit	✔	23-04-2021 10:53	File folder
GST	↻	23-04-2021 10:56	File folder
Income Tax	✔	23-04-2021 10:55	File folder
ROC	✔	23-04-2021 10:50	File folder
TDS	✔	23-04-2021 10:53	File folder

Name	Status	Date modified	Type
Ay_1819	✔	23-04-2021 10:50	File folder
Ay_1920	✔	23-04-2021 10:50	File folder
Ay_2021	✔	23-04-2021 10:56	File folder
Notices	✔	23-04-2021 10:56	File folder

This PC > Documents > Empower\_Finance > Income Tax > Ay\_2021 >

Name	Status	Date modified	Type
Documents	✔	23-04-2021 10:54	File folder
Final_Set	✔	23-04-2021 10:55	File folder
Queries	✔	23-04-2021 10:54	File folder
Tax_Paid_Challans	✔	23-04-2021 10:54	File folder

This PC > Documents > Empower\_Finance > GST >

Name	Status	Date modified	Type	Size
1718	✔	23-04-2021 10:51	File folder	
1819	✔	23-04-2021 10:52	File folder	
1920	✔	23-04-2021 10:52	File folder	
2021	✔	23-04-2021 10:54	File folder	
2122	✔	23-04-2021 10:52	File folder	
Notices	↻	23-04-2021 10:57	File folder	

This PC > Documents > Empower\_Finance > GST > 2021

Name	Status	Date modified	Type	Size
Challans	✔	23-04-2021 10:52	File folder	
GST_3B	✔	23-04-2021 10:52	File folder	
GST_Audit	✔	23-04-2021 10:54	File folder	
GSTR1	✔	23-04-2021 10:52	File folder	
Misc	✔	23-04-2021 10:52	File folder	
Working	✔	23-04-2021 10:52	File folder	



# Some Tips for File Management

## • Computer/Online Files

- ❖ Don't include Space in file/folder name
- ❖ Include Date in File Name if Possible
- ❖ Make Standardization of File Name  
For Eg Income Tax – Client Name\_IT/TDS\_Ay\_Month/Quarter/Challan Amount  
  
for April 2021 Rs 5000TDS Challan-  
File Name  
1\_EFCPL\_TDS\_AY202122\_Apr20\_5000
- ❖ Online Sync Backup
- ❖ Keep Minimum & compressed file on System

## • Offline Files

- Offline File with File No & not as per group with Indexing for File
- Make Separate file for Extra/Duplicate/Working File and store it at separate place other than main storage.
- On Every Diwali , give 1 day time and separate your records usable/returnable/to be destroyed etc
- If possible, purchase high speed scanner and scan all the important record or record till date

# CLIENT MANAGEMENT



100% Client List



ABC Analysis



Newer Technology habit to client which saves time/cost (Not for 100% but start)



Value Added services & timely inform about it



Yearly Meet if possible, training of selective clients individually online/offline

RB27



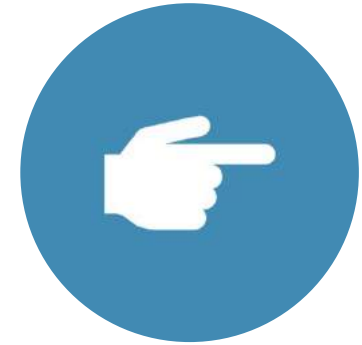
Discuss A grade clients their difficulty and find solution



ANY SUGGESTION?



ANY INPUT?



YOU HAVE TO START

## Question & Answers

Contact- **8888654567**, [carsbiyani@gmail.com](mailto:carsbiyani@gmail.com)

# One Drive Features

1) Simple to Understand

2) Auto sync facility removes headache of taking backup

3) Anytime, Anywhere accessible due to mobile app

4) Basic Plan -1 TB Data with 6 users for cost of Rs 5000/- per annum

5) Security features by Microsoft

6) Option to give selected data access to Employee, Client or third parties

7) Desktop version is also available

8) Free access to latest MS Office gives various new tools of Excel & Word

Website-  
[www.onedrive.live.com](http://www.onedrive.live.com)

## CA Serve- Features ([www.caserve.in](http://www.caserve.in))

- 1) Task & Employee management becomes easy
- 2) Role Based Access, keeps office control at a click
- 3) Automated Task Saves your time
- 4) Task Reminders keeps things updated
- 5) Increase efficiency & Productivity of your Team
- 6) High Speed, Light Weight, User Friendly UI

7) Fully Secured with AWS 256 bit Encryption

8) Available on all Platform- Web, Andriod, iOS

9) UDIN, DSC Management becomes easier

10) Smart & instant Invoice generation Increase Revenue

11) Client Login with document upload facility

12) Daily Whatsapp updates for Todays Reminders (Beta Version)

13) 30 Days free Trial & many More

# PDF Compressor, Converter etc

## Small PDF

- Online and Desktop Version available
- Accessible anywhere, anytime with mobile app
- Quality & Compression ratio is very good
- One login can be used on multiple devices
- Cost – Approx 7500/- per annum
- Various PDF tools available with cloud storage space

## PDF 24

- Online and Desktop Version available
- Free and paid versions are available
- Various PDF tools are available