



PROFSOFT



Welcome



Welcome and introduction

- Company overview
- Software overview
 - ProfSoft Framework
 - Deployment
 - Project Management Process
 - ProfCost
 - ProfSec
 - ProfTax
- Software demonstration
- Questions & answers, and connecting



Company Introduction

> 30 years

- 1992 – Consulting
- 1993 – Software development
- **2004 – NEW BEGINNINGS**
- < 10 staff



Company Philosophy

- Contribute to and learn from every interaction with a Client
- Treat every client as a long-term strategic partner
- Strive to continuously encapsulate knowledge and best practices into our systems, **including all new development**



Company Philosophy (cont)

- All installation, training and support included in monthly fees, even free conversions. We consult, not just support – no extra costs (**free**)!
- Up and running effectively within one week and finalised within a month.
 - Cost, Sec and Tax training each in 3 – 4 hours.
- We build solutions around our customers' needs, through understanding their business and by delivering on technology that enhance and grow their business.



Company Overview (cont)

- **2004 – New beginnings**
 - New market definition / analysis
 - Accountants and Auditors
 - Tax Practitioners
 - Company Secretaries
 - Architects
 - Attorneys
 - Consulting engineers
 - Time management (Property Management)
- New development tools
 - .NET Framework / Components



Company Overview (cont)

- **2004 – New beginnings**
 - Practice Management
 - Debtors' management
 - Automated emails
 - WIP Time and Expenses
 - Staff and Project planning
 - FICA and other documents uploads and search
 - RISK and Business Categories management
 - IRBA and SAICA reports
 - Creditors and GL mapping
 - Export to Pastel and Xero



Company Overview (cont)

- **2004 – New beginnings**
 - Company Secretarial
 - CO, CC and Trust registers
 - Beneficial Ownership and Organograms
 - Annual Returns
 - Share registers
 - FICA and historic document uploads and search
 - Letter writing with emails
 - Directors and other appointment/resignation letters



Company Overview (cont)

- **2004 – New beginnings**
 - Tax Administration
 - Correspondence
 - IT12, IT12TR, IT14
 - Supporting documents
 - SARS tax calculation
 - Assessments, IT34 (PDF and data)
 - Provisional Tax
 - Letter writing with emails
 - Management and statistical reports



Company Overview (cont)

- Clients

- A few current clients include

- BGC, **C2M**, ComputereShare, Crowe, Exceed, **FODB**, HVM, ImmelmanFerreira, Jacques Basson, Integrum, Kilgetty, **MGI BassGordon**, Mazars, MD, **MOORE**, **MST** Group, Private Clients, Ratio Group, SA Company Formation, Sable International, Smith & Ass, Statucor, **SDK**, The Secretarial Company, The Company Secretaries
 - ACG, Java Capital, Mozambique Management Company, Northern Wychwood, PCC, Stefanutti Stocks, VGI

- Countries

- South Africa, Australia, Botswana, Namibia, Isle of Man, Zimbabwe, Anywhere



Software Overview

- Why Web based applications?
 - Scalability: enterprise / small business
 - Deployment / Updates & Maintenance
 - Versatility of Internet deployment
 - No onsite installation required
 - No onsite updates required
 - No onsite hardware or software required
 - Universal standard – W3C Standards
 - Components to fit processes
 - “OS-agnostic” – Browser based applications
 - Browser independent – Chrome, Firefox, IE



ProfSoft Framework

Organisation

Office

Office

Office

Office

Service Lines / Sub Service Lines

Employees

Employees

Employees

Employees

Clients / Corporate and Trust Registers / Taxpayers

Projects

Projects

Projects

Projects



ProfSoft Framework

Employees

Category

**By Employee
Or
By position**

Security Role

**By Employee
Or
By role/level**

Service line

**None
Administration
Audit
Accounting
Consulting
HR
Secretarial
Tax
Any other**

**Sub-Service
line**

**None
Administration
Associate
Director
Manager
Technologist
Team 1, 2, 3
Any other**

Rates

Menu Access

Reports

Reports

Cost, Sec, Tax

Manager 1

Clients

Manager 2

Manager 3



ProfSoft Framework

Clients (can be different in Cost, Sec and Tax)

Manager 1

Group

Business category

Manager 2

None
Regions
Group 1
Group 2

None
Administration
Central Government
Foreign Countries
Government
International
Local Authorities
Parastatals
Provincial Government
Private
Semi-Government
----- **OR** -----
IRBA / SAICA / Other

Manager 3

Reports

Reports

Reports



ProfSoft Framework

Projects			
Manager 1	Group	Service line	Audit Categories
	None	None	IRBA / SAICA
Manager 2	Regions Group 1 Group 2	Administration Audit Accounting Consulting HR Secretarial Tax	
Manager 3			
Reports	Reports	Reports	Reports



ProfSoft Framework

Reports

Office

Services

Projects

Employee

Debtors

Listings

XHTML

PDF

Excel

Word

XHTML

PDF

Excel

Word



Project Management

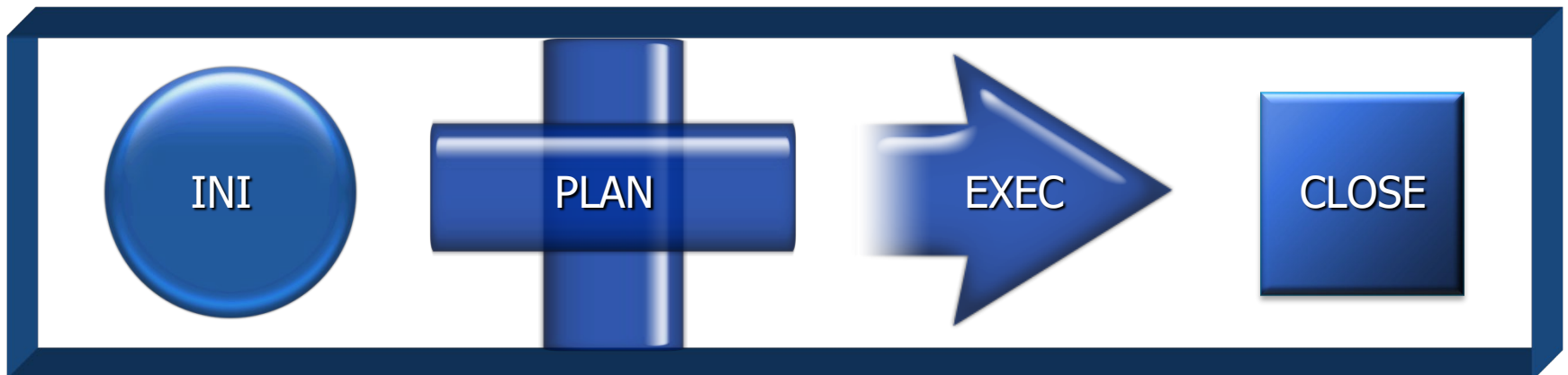
- A dynamic process during which the focus is on:
 - achieving defined goals
 - within a specific timeframe
 - within a specific budget
- Techniques to:
 - carry out the project plan
 - adhere to or remain within the project plan





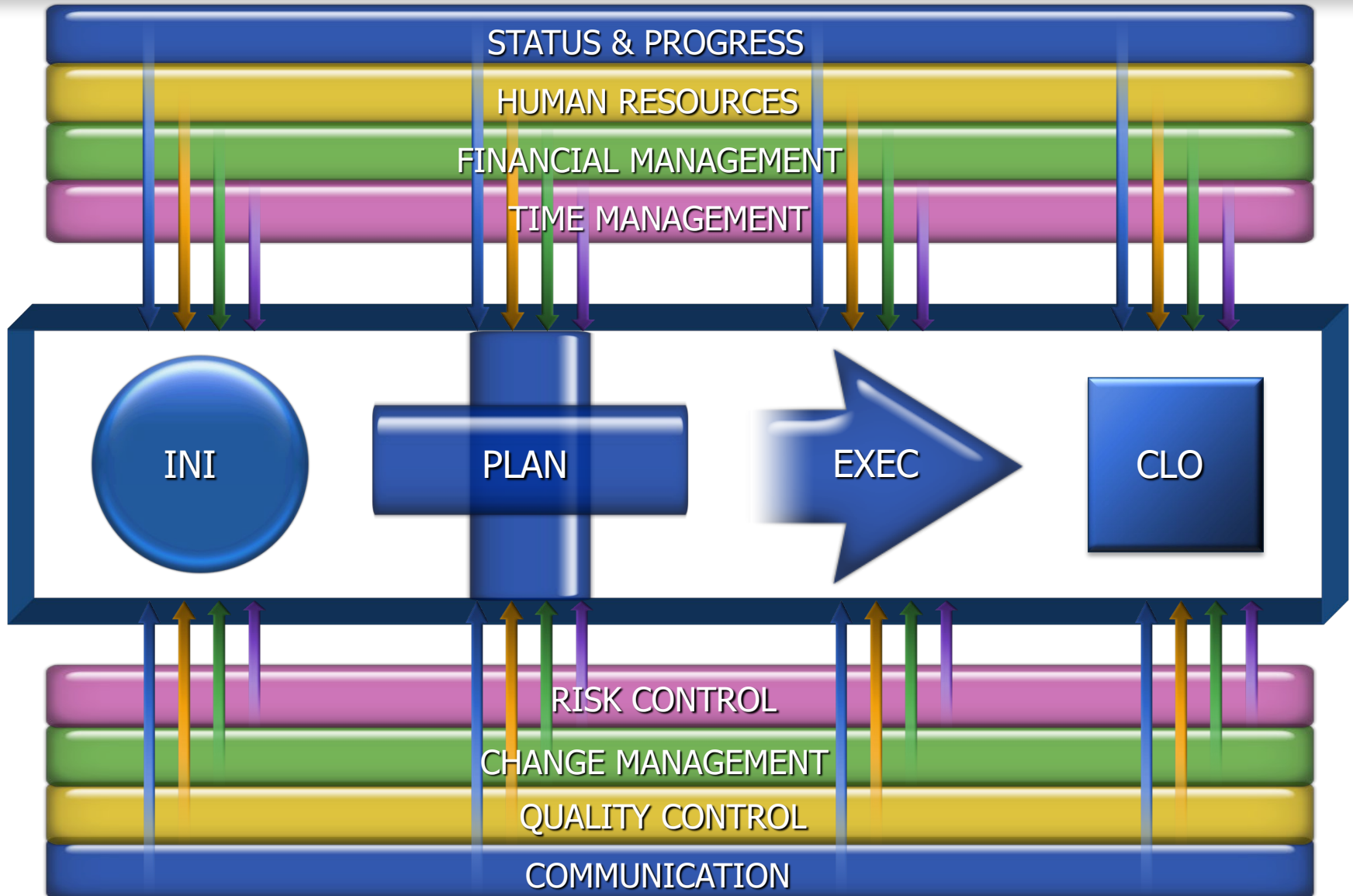
Project life cycle

- Informal phase
 - Justification
- Formal phases
 - Initiation
 - Planning
 - Execution
 - Closure





Project management process





Effective management tool

Risk control	...structured reporting...
Time and expense management	...time sheets, expense claims...
Change management	...versatility...
Financial and cost management	... <i>accurate record-keeping</i>
Quality control	<i>"It costs less to do a task correctly the first time than to repeat the task."</i>
Human resources management	... <i>productivity AND profitability...</i>
Communication management	... <i>information is created, gathered and distributed at the right time</i>
Status reporting	<i>Regular reporting on various levels, for various role-players ...</i>



Software overview

Security

Functionality

Web based

Speed

Interoperability



ProfCost features

Debtors

Approval system

Management Reports

Timesheets
Leave

Disbursements,
Expenses

Projects
Budgets and Planning



ProfSec features

CO, CC, Trust, Other
Registers

Annual Returns and
Beneficial Ownership

Letter editor and
emailing

Share register

Full history

Fast and effective
Formations



ProfTax features

Global and manual
functionality

Approval system

Management Reports

ISV to eFiling
integration

IT12, IT12TR, IT14,
IT34

Correspondence



Demo and Q&A

Demonstration

Q & A



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Thank You!

