

Problem statement

Tax professional face challenges in managing and integrating data from various accounting systems, dealing with complex user interface and customizing tax reporting to meet specific needs. As a PM design and propose new feature to solve one or more pain points

Pain points

1. Multiple source of income , multiple accounts in which transaction happens , multiple trading accounts
2. Understanding / Navigating the UI is difficult
3. Too many stages/layers before you can submit your tax - segregating the different tax forms that a user can fill , naming more meaningful along with the information tag about what each tax form doe example form B is for people who has a single source of income

Possible Solutions

1. Sit with designer UI/UX to make the layout , navigation more user friendly more informative .
2. Have educational video segment in portal for understanding what each column does also attach link in the info bar
3. we could have pdf upload where it scans all profit/loss in case of trading and could also understand long term, short term and mid terms gains .
4. Chatbot feature where one could ask questions related to ask if the user is unsatisfied they can open a support case for the same