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SOFTWARE REQUIREMENT SPECIFICATION

**TaxBreeze**

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| **Prepared for:**  **PWC** | **Submission Date:**  19 Mar 2018  **Proposal ID:**  SRS/19032018/1343/2 |

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Revision History

|  |  |
| --- | --- |
| ***Document Owner*** | Verbat Technologies |
| ***Document Location*** | This document is only valid on the day it was printed and the electronic version is located at /PMO/SRS |
| ***Document Status*** | ***Approved*** |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Revision #** | **Revision Date** | **Description of Change** | **Author** | **Comments** |
| 1.0 | 16 Mar 2017 | Initial Draft | Varsha E |  |
| 2.0 | 19 Mar 2018 | Updated Review Comments | Prashant Thomas |  |
| 3.0 | 19 Mar 2018 | QA Review | Suraj Jayaram |  |
|  |  |  |  |  |
|  |  |  |  |  |

Document Approval

This document has been accepted and approved by the following:

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| **Signature** | **Printed Name** | **Title** | **Date** |
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# Introduction

This section gives a scope description and overview of everything included in this SRS document. In addition, the purpose of this document is described. The purpose of this document is to give a detailed description of the requirements for the “TaxBreeze”. The document will illustrate the purpose and complete declaration for the development of the system. This document is primarily intended to be proposed to a customer for approval, and a reference for the development team to develop the first version of the system.

## Product Perspective

The proposed system should be able to handle both ITR1 and ITR 2 returns as per Income Tax Authority of India. The users should be able to register, submit personal and tax related information, track the status etc. by using the system.

TaxBreeze will aim to provide interactive compliance management system that will automate compliance responsibility of the taxpayer. TaxBreeze is in line with government process of improvising the infrastructure for providing fully online module for electronic return filing with online payment.

# General description

## Assumptions & Dependencies

One assumption of this application is that it will be using a compatible browser connected to Internet, which we have specified in section 4.1.

The upload and download of documents/ files will depend on the internet speed. We assume the internet speed for the users would be adequate for uploading/downloading files of large size. In case the speed is not adequate/stable, downloads/uploads may be interrupted.

The points mentioned below are out of the scope of this project.

* Purchase of images, fonts
* Adding new features to the application other than mentioned in the functional specification.
* Any language other than English
* Manual data entry
* Hardware Integrations / procurement and purchase
* Database migration
* Content writing
* Physical deployment at client’s site
* Backup solution and Disaster recovery
* API’s to be provided by PWC
* Payment gateway shall be procured by PWC
* Client documents shall be stored on PWC Middle tier servers
* Azure Access shall be provided by PWC
* Chatbot API’s and directions to be provided by PWC

# Functional requirement

The application being developed shall have the following components

* Web site with information on services provided, pricing etc.
* Tax filing portal where users can register or login so that they can complete their tax filing

The sections below shall describe these components in detail

## Website

The Website shall have the following pages. Verbat shall design these pages with appropriate layouts. PWC shall provide Verbat with additional information and guidance to finalize the layout of these pages as well as its content and graphics. The pages that shall be designed are

* Services page: Describes the services provided by PWC
* Pricing: A page that shall provide details on the plan options, its price and description
* Help Center: A page dedicated to provide insight and tips to Tax Breeze users
* Contact: Information page that shall provide email and phone numbers additionally it shall have a “Contact Us” form with the following fields
  + Email address
  + Subject
  + Description
* Site Header: The site header shall display the name of the logged-in user (if user had logged in)
* Chat (Plugin) – \**Client to provide the plugin*
* Terms & Conditions: Standard disclaimers for the site
* Legal
* Privacy Policy: Cookie, Session policies etc. along with information that details how PWC shall utilize the user information
* Site Provider: A page that shall display more information on PWC India with its registered address, mailing address Fax numbers, phone numbers and email
* Linking Policy: Page that shall describe the linking policies followed by PWC India

## Application

### Site Registration (Via Social Media)

* New Users shall register on the site using popular social media logins such as
  + Facebook
  + Twitter
  + Google
* The application shall use the API provided by these sites to authenticate the users
* Once the users are authenticated via social media, their username and email address shall be logged on the cloud app for future reference
* The users shall be prompted to create a password for their account by prompting the user to enter passwords twice

### Site Registration via PAN Number

* Users shall also choose to register using their PAN Number
* Users shall enter their password twice to validate their password

### Registration email

* After the user has registered via social media or PAN card, they shall receive an account verification email
* Users shall verify their email by clicking on the link in the verification email

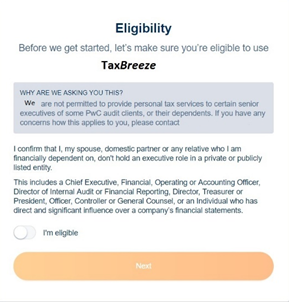
### Terms and Conditions

* Users shall accept the terms and conditions of PWC to continue using the website for filing taxes

*TBD: does 3.2.4 come before 3.2.5 (Need to confirm)*

### Eligibility

* Before starting application applicant shall confirm eligibility as described in the image below

****

* The application shall make a note of the eligibility status so that it can be provided to the PWC Middle Tier.

### Basic Profile Information

Before the user is directed to select a plan, the user is directed to fill their basic information. This is because the user may be indecisive at the time and may require gentle reminders to return back to Tax Breeze to continue their registration

Basic information includes

* First name, last name, Phone, DOB and PAN #

### Plan Options

Once the user has acknowledged their eligibility, the user shall be provided with different options to select a package that best fits their use case. The pricing plans shall provide the following information

* Name of the package
* Price of the package
* Description of the package with benefits and brief use cases

### Plan options display

Plan options shall be displayed on aptly labelled tabs. Clicking on each tab shall display plan price and descriptions. A radio button placed on each tab shall be used to select the plan

### Returning Registered Users: Login

Users who have registered may log back into the site using their social media login credentials or PAN numbers.

* In the former case once the user shall be authenticated via social media, they shall have a reference in the cloud database
* In the latter case, they shall be authenticated using their PAN # and password stored in the cloud database

### Payment

After the user has provided their basic information and selected the plan, they shall be directed to the payment gateway where they shall use their credit or debit card details to pay for the PWC service desired. The payment gateway shall be provided by PWC.

The Cloud database shall store the following

* Plan selected, Date paid, amount paid and status of payment

PWC SERVER INPUTS

If the payment process was a success this information will be posted to the PWC Middle Tier application in JSON format. The details of the message shall include

* Tax payer First and Last Name
* PAN #
* DOB
* Email & Phone
* Plan selected, payment date, Payment amount (optional)
* Payment Reference Number

PWC shall provide services to update this information as well as read this information.

PWC SERVER OUTPUT

PWC shall provide an internal reference number for the newly lodged taxpayer. The purpose of this reference number shall be to update the PWC Middle Tier with future updates to all other information related to the lodged taxpayer

### New PAN Card

Users who have registered on the site and who has already selected and paid for a plan, but without a PAN number shall be provided with the following option

* A link with clear instructions on how to apply for a new PAN card

Action Item: PWC to provide the necessary information

### Download XML File

New users without tax records in PWC, but has filed for taxes shall be redirected to the Income Tax site with information on how to download their XML file.

Action Item: PWC to provide the necessary information

PWC Services Required

* Upload XML file to PWC Middle Tier ()

### Use upload XML file to prefill data

Users shall be able to upload the XML file that they had downloaded from the government supplied tax filing portal. This file shall be used to prefill information related to the user’s tax profile.

### Prefill with PAN data

Alternatively (with ref to 3.2.13) users can simply provide their PAN number. The PAN number shall be used to pre-fetch basic profile information using web services

### Tax Period

Before filing the taxes the user shall select the tax period for which they are filing their taxes

### User Dashboard

The applicant dashboard shall contain information on,

#### Tax summary

Tax Summary information shall be provided by PWC to the tax payer after they have submitted all of the requested information to PWC. The tax summary information shall contain the following

* Tax Summary
* PWC ITR pdf file
* PWC tax calculation file

PWC Services required

* Tax Summary statement()
* ITR ()
* Tax Calculation document()

User shall have the option to e-Submit the Tax Return in this section.

#### My tax returns (Current + History)

If the applicant had created Tax returns for multiple tax years, then all those records shall be listed on the dashboard, with proper status of those returns. Tax Records shall be available by year (as a dropdown or similar)

#### Search

On the dashboard, there shall be a search field which shall be used for searching the user’s tax records. The search results shall return a list of tax records that match the search query. Search shall return results with the following characteristics

* Return a list of documents that match search criteria based on document title
* Return a list of documents that match the document metadata
* Return a list of documents that match the document text
* Document name along with a URL shall be returned in the search result

#### Document Library

A Document Library needs to be provided in the dashboard, from where the applicant shall be able to view the uploaded docs (list of docs uploaded for creating tax return pertaining to each Tax Year) and the final docs (the one prepared by the PwC pertaining to each Tax Year). The screen shall list all those documents and the user should be able to View/Download them.

#### Tax savings

The tax savings shall list the amount of money saved by the tax payer by filing their returns with PWC. Tax savings tab shall contain the following

* Tax saved for the current filing
* Basis for the savings calculated
* A statement of comparison with respect to competition

### New Tax Filing

A logged in user who has not started their tax filing process shall click a button visibly located on the site header (or appropriately) prompting them to start their tax filing. This button shall not be visible to a user who has already started the tax filing process for the tax year. Information available from earlier tax filings shall be used to prefill data elements for which information is available

Returning users who have not started their tax filing for the tax year shall see a link to start a new tax filing for that year. This link shall be visible on their dashboard.

#### Basic Tax Profile Information

User shall answer the following information to establish their tax profile. This questions shall be answered using a True/False format.

* Do you have income from salary?
* Do you have income from other sources (E.g. Royalty Income, Interest Income etc?)
* Have you paid interest on self-occupied house property?
* Do you have income/losses from rental property?
* Do you have income/losses from capital gains?
* Do you have any tax deductions?

The answers to these determine the type of questions that shall be asked in the tax profile completion workflow.

#### Personal information

A tax payer who had registered on the site and had made payments using the payment gateway shall be able to file taxes using the PWC tax filing portal. The applicant has to meet all the conditions set forward by PWC to be eligible for filing taxes. (Register, accept PWC terms & conditions, acknowledged tax filing eligibility, completed payment etc.)

The first step towards the tax filing process is to submit their personal information. This information is also part of their basic profile, hence the user shall be able to complete their profile outside of the tax filing workflow.

The basic profile can be completed by leveraging other sources of information such as

* PAN Number
* XML file: The XML file shall be either (a) the current year’s XML or (b) from a prior year. The XML file shall be leveraged to extract information regarding the users
  + Personal Information
  + Address
  + Employer Information
  + Bank Details
* Returning users with saved data from a prior year

Personal Information consist of the following data elements

* Text box- First Name
* Text box- Middle Name
* Text box- Last Name
* Text box- Father’s Name
* Text box- Email ID
* Text box- Mobile number
* Text box- Secondary Mobile No
* Text box- Landline No
* Calendar- Date of birth
* Dropdown- Gender
* Text box- Employer Name
* Text box- Employer Type
* Text box- PAN card number
* Text box- Aadhaar card number/Enrollment ID
* Passport number (If available)

#### Address

Applicant communication address shall prefill in the form using PAN card details or XML, applicant shall update and save the data

* Text box- Flat / Door / Block No.
* Text box- Premises / Building / Village
* Text box- Road / Street / Post Office
* Text box- Area / Locality
* Drop Box- Pin Code
* Text box- Town / City / District
* Drop Box- State
* Drop Box - Country
* Back button
* Save and Continue button

#### Income Sources: Salary Income

Applicant shall upload salary income source details. Applicant shall navigate back to previous page by clicking on ‘Back’ button or continue the process by clicking “Save and continue” button.

A check box shall be provided to the user to prefill information in this section based on prior year’s tax filing or from the XML provided.

The details of the form shall include

##### Form 16 or Salary Statement

* Upload Form 16
* Dropdown to indicate the type of file being uploaded (The dropdown shall be defaulted to Form16-Salary statement).
* Since the context is known, the dropdown may be omitted, since the ,document type is known
* Document password (Text box)
* Upload button
* Add new Salary details

##### Income from salary

* Income chargeable under the head ‘Salaries’\* (Text box)

With help text “In your Form-16, find this information under Part-B Details of Salary Paid (Heading 6)”

* Name of the employer \* (Text box)

With help text “The name of Company / Organization”

* Employer Type/ Category (Drop-down with values Government, Private sector, Public sector unit)

##### TDS for salary

* Help text “Tax Deducted at Source by Employer: Provide this information from your Form 16”
* TAN of the Employer \* (Text box)

With help text “In your Form-16, find this under Part-A - TAN of Deductor”

* Tax Deducted at source on Salary\* (Text box)

With help text “In your Form-16, find this under Part-A: Total of Amount of tax deposited / Remitted”

#### Income Sources: Other Income

Applicant shall submit details of income from sources other than salary. Applicant shall navigate back to previous page by clicking on ‘Back’ button or continue the process by clicking “Save and continue” button

##### Document upload

* Upload “Other Income” statement
* Document Type (Other Income)
* Document password (Text box)
* Upload button

##### Interest Income

* Interest income from saving bank and post office deposits (Text box)
* Other interest income: From fixed deposits etc (Text box)

With help text “Interest from sweep accounts converted to FDs also specified here”

* Applicant shall be able to add more than one other interest income details

##### Any Other Income

* Any other income (Text box)

With help text ”  Report any other income which is not part of Income from Salary, House Property, Capital Gain or Business and Profession head. Gifts can be declared as Income here”

* Applicant shall be able to add more than one other income details by auto increment field

##### Exempt Income

* Dividend earned (Text box)

With help text “Dividend from shares. Income earned on investments in Mutual Funds, ULIPs, UTI”

* Exempt interest income (Text box)

With help text “Example: Interest earned on PPF”

* Applicant shall be able to add more than one Exempt income details

##### Agriculture Income

* Gross Agriculture Receipt (Text box)

With help text “Specify gross agricultural income”

* Expenditure On Agriculture (Text box)

With help text “Specify expenditure on agriculture sources”

* Unabsorbed Agriculture Loss (Text box)

With help text “Specify unabsorbed agriculture loss”

* Applicant shall be able to add more than one agriculture income detail

##### Dependent Income

* Amount\* (Text box)
* Name of Person \* (Text box)
* Relationship \* (Text box)
* Nature of Income \* (Text box)
* Applicant shall be able to add more than one dependent income detail

##### PF Withdrawal Income & Tax Rate

* PF Amount (Text box)
* Tax rate (Drop-down with values 1, 10, 12.5, 15, 20, 30, 50)

#### Income Sources: House Property

Applicant shall add House property details. Applicant shall navigate back to previous page by clicking on ‘Back’ button or continue the process by clicking “Save and continue” button

##### House address

User shall be able to prefill this section using the prior year’s tax filing or the XML provided. User shall be provided with a checkbox to make this choice.

Additionally an option shall be provided to prefill this section based on the personal address provided in the initial data collection screens. (Similar to marking billing address is same as delivery address on e-commerce sites)

* Flat/Door/Block Number \* (Text box)
* Road / Street (Text box)
* State \* (Drop Box)
* PIN Code \* (Drop Box)
* Area / Locality \* (Text box)
* Town / City \* (Text box)
* Country \* (Drop Box)
* Applicant shall be able to add more than one property details

##### Interest paid on housing loan for self-occupied property

* Select property if more than one property was added in the previous section
* Help text “If you have a housing loan against a house you live in (Self Occupied property) then you can claim a tax deduction of up to Rs. 2,00,000
* Is there any Housing loan applicable on this property? (Drop-down values Yes/No)
* Interest paid on loan for self-occupied property (Text box)

With help text “The loan should have been taken after April 1, 1999”

User shall have the option to upload housing loan interest certificate (optional)

* Select property if more than one property was added
* Select your document (File up loader)
* File type (Drop-Down) shall be “Housing loan interest Certificate”
* Upload document button

##### Property Ownership

* Select property if more than one property was added
* Is your Property Co-owned? \*(Drop-down with values yes and no)
* Your ownership share of the Property (Percentage %) \* (Text box)

##### Co-Owner details

* Select property if more than one property was added
* Name\* (Text box)
* PAN No\* (Text box)
* %Share\* (Text box)
* Applicant shall be able to add more than one co-owner details

#### Other Income: Rental property

Applicant shall submit the rental property income details. Applicant shall navigate back to previous page by clicking on ‘Back’ button or continue the process by clicking “Save and continue” button.

##### Property Address

User shall be able to prefill this section using the prior year’s tax filing or the XML provided. User shall be provided with a checkbox to make this choice.

Additionally an option shall be provided to prefill this section based on the personal address provided in the initial data collection screens. (Similar to marking billing address is same as delivery address on e-commerce sites)

* Flat/Door/Block Number \* (Text box)
* Road / Street (Text box)
* State \* (Drop Down box )
* PIN Code \* (Drop Down box)
* Area / Locality \* (Text box)
* Town / City \* (Text box)
* Country \* (Drop Down box)
* Applicant shall add more than one Rental property Addresses

##### Income earned from Rental Property

* Select Property if more than one property was added
* Annual Rent Received by you (Text box)

With help text “Please specify the portion of the rent received by you if the property is co-owned.”

* House Tax paid by you  (Text box)

With help text “Specifying House Tax you paid reduces your tax liability”

* Name of Tenant \* (Text box)
* PAN of Tenant \* (Text box)

##### Interest paid on housing loan rental property

* Select property if more than one was added
* Is there any Housing loan applicable on this property?(Drop-down box with values yes and no)
* Interest paid on loan for Rental property (Text box)

With help text “The loan should have been taken after April 1, 1999”

* Help text “ You may upload housing loan interest certificate here (optional)”
* Upload “Housing loan interest certificate”
* File type (Drop-Down) : “Housing loan interest certificate”
* Upload button

##### Unrealized Rent

* Select Property if more than one
* Unrealized Rent Amount \* (Text box)

With help text Unrealized Rent and Arrears of Rent received during the year under section 25A after deducting 30%

##### Property Ownership

* Select property if more than one
* Is your Property Co-owned? \*(Drop-down with values yes and no)
* Your ownership share of the Property (Percentage %) \*  (Text box)

##### Co-Owner details

* Select property if more than one
* Name\* (Text box)
* PAN No\* (Text box)
* %Share\* (Text box)
* Applicant shall add more co-owner details by auto increment field

#### Income Sources: Capital Gain

Applicant shall submit any sell asset (shares, property, house, land, building, etc.) between the periods of April 1, 2017 to March 31, 2018. Applicant shall navigate back to previous page by clicking on ‘Back’ button or continue the process by clicking “Save and continue” button.

* Upload Details of shares/debentures

File Type (Drop-Down): “Sale of Shares/Debentures”

* Upload Details of sale of land or building(Property)

File Type (drop-down): “Sale of Land or Building”

* Detail of sale of any other asset (file up loader)

File Type (Drop-Down): “Sale of Any Other Asset”

* Detail of sale of mutual funds

File Type (Drop-Down): “Sale of Mutual Funds”

#### Deductions: Section 80 Deductions

Applicant shall submit Deductions under Section 80 is mandatory if it is not part of Form 16B. Applicant shall navigate back to previous page by clicking on ‘Back’ button or continue the process by clicking “Save and continue” button.

##### Investments under Section 80C

* Help text “You can claim a deduction of up to Rs. 1,50,000 under this section. Add up all your 80C deduction and specify total amount here.”
* Investment for Section 80C (Text box)
* Help text “Section 80C includes contributions to LIC / Insurance premium, PPF, EPF, NSC, ELSS Mutual Funds, Children school fees, Payment of Principal in Housing Loan & other eligible items.”

##### Section 80D: Deductions for Medical Insurance

* Help text “Deductions for Medical Insurance Premium or Preventive Health Check-Up Fees Paid by you.”
* Medical Insurance Premium for you, your spouse, or dependent children (Text box)
* Preventive Health Check-Up fees for you, your spouse, or dependent children(Text box)
* Medical Insurance Premium for your parents (Text box)

Help text “Note: Amount up to Rs 30,000 in respect of Medical Expenditure a very senior citizen (80 years or more) shall be allowed under section 80D. Provided such person is not having a health insurance

* Are your parents who hold the policy senior citizens? (Text box)

Help text “60 year” (Drop down with values yes and no)

##### Section 80TTA: Deduction for Interest earned on SB Account

* Interest earned on Savings Bank Account (Text box)
* Help text “You do not need to enter a value for the 80TTA deduction here.

It up from your declared interest income from Saving Bank account and post office deposits”

##### Section 80G: Donations to charitable organizations

* The government requires itemized details of donations for Section 80G. (Text)
* Click here (Link) to Add Donor Details
* User shall be able to add more than one Donor Details

#### Deductions: More Deductions Under Section 80

Applicant shall submit more deductions under Section 80 is mandatory if it is not part of Form 16B. Applicant shall navigate back to previous page by clicking on ‘Back’ button or continue the process by clicking “Save and continue” button.

##### Section 80CCG - Rajiv Gandhi Equity Saving Scheme

* Investment made under Rajiv Gandhi Equity Saving Scheme (Text box)

##### Section 80E

Education Loan on higher studies (Graduate or Post Graduate)

* Help text “ You can claim tax deduction on the interest paid on an education loan for higher studies”
* Interest on higher education loan paid this year (Text box)
* Help text “Interest paid by you on loan taken out by you. Loan can be for yourself or your spouse or your children ”

##### Section 80CCC

Contribution to Pension Plan / Annuity Fund

* Contribution amount to Pension Plan / Annuity Fund for Section 80CCC (Text box)

###### Section 80CCD (1) and (1B) - Employee Contribution to New Pension Scheme (NPS)

* Help text “Employee's contribution to the New Pension System (NPS).

Please enter your own contribution to NPS. It will be split into Section 80 CCD (1) and CCD (1B) in your tax return. The split will be optimized to give you maximum tax savings.”

* Contribution towards Section 80CCD(1) (Text box)

##### Section 80CCD (2) - Employer Contribution in NPS

* Employer’s contribution towards NPS (up to 10% of Salary). (Text box)

##### Section 80GG

Deduction for House Rent. Self-employed or Salary with no HRA

* Help text “Not a commonly applicable deduction. Please be careful while claiming. If you receive HRA benefit, then you cannot claim this deduction.

If you are looking to claim HRA, this is NOT the section.

Eligibility: Your spouse or minor child should not own House Property in same town where paying rent. Self-occupied house property Interest deduction should not have been availed

* Rent Paid Per Month (Text box)
* Number of month’s Rent Paid (Drop-down with values 1-12 )

##### Section 80DDB

Deductions for treatment of specified diseases and ailments

* Help text “This deduction is for certain specified diseases. (It is not a commonly applicable deduction). Please be careful while claiming this deduction.”
* Medical Treatment Costs for specified Diseases under Section 80DDB (Text box)
* Age of person for whom deduction is being claimed (Drop-down with values bellow 60 years, 60-79 years, 80 years or above )

##### Section 80EE - Interest on Home Loan

* Help text “Deduction under section 80EE is available on interest on loan on your first house purchased.
* Help text “This purchase should be in the Financial Year 2016-17 (between April 1st, 2016 to March 31st 2017).”
* Help text “The purchase price of the house can be up to Rs. 50 Lakhs and the total home loan can be up to Rs. 35 Lakhs.”
* Deductions under Section 80EE (Text box)

###### Section 80QQB - Royalty Received on books

* Help text “Deduction for Author of literary/scientific/artistic book. Royalty/copyright-fees/lump-sum consideration are eligible for deduction.”
* Enter the deduction amount (Text box)

##### Section 80RRB - Income on Patents/Inventions

* Help text “Deduction for Patentee - Royalty/transfer-of-rights/lump-sum consideration are eligible for deduction.”
* Enter the deduction amount (Text box)

##### Section 80GGA

Contribution to Research or Rural Development

* Help text “For example, Helpage India or CRY are eligible under Section 80GGA.”
* Contribution to Research & Development or Rural Development (Text box)

##### Section 80GGC - Contribution to Political Party

* Contribution or Donations to Political Party (Text box)

#### Taxes Paid

Applicant shall submit Taxes Paid. Applicant shall navigate back to previous page by clicking on ‘Back’ button or continue the process by clicking “Save and continue” button.

##### Upload 26AS

* Select your 26AS document(File Up loader)

File Type (Drop Down): “26 AS”

* Enter the document password(Textbox)
* Upload document(Button)

##### Challan Details

* BSR Code\*(Textbox)
* Date of Payment(Textbox)
* Challan Sr. No.\*(Textbox)
* Tax Paid\*(Textbox)
* Applicant shall be able to add one or more Challan details

### Bank Details

Applicant shall submit Bank Details. Applicant shall navigate back to previous page by clicking on ‘Back’ button or continue the process by clicking “Save and continue” button.

User shall be able to prefill this section using the prior year’s tax filing or the XML provided. User shall be provided with a checkbox to make this choice.

Additionally an option shall be provided to prefill this section based on the personal address provided in the initial data collection screens. (Similar to marking billing address is same as delivery address on e-commerce sites)

Note: Since Bank details do not change often enough, It shall be included as part of the personal profile of the user

#### Primary Bank Account

* Account Number\* (Text box)
* Account Type\* (Drop down with values Savings and Current)
* Name of Bank\* (Text box)
* IFS Code\* (Textbox)

#### All Other Bank Accounts

* Account Number\* (Textbox)
* Account Type\* (Drop down with values Savings and Current)
* Name of Bank\* (Textbox)
* IFS Code\* (Textbox)
* Applicant shall be able to add more than one bank if they have multiple bank accounts

### Assets and Liabilities

Applicant shall submit Assets and Liabilities. Applicant shall navigate back to previous page by clicking on ‘Back’ button or continue the process by clicking “Save and continue” button.

Note: Since Assets and liabilities typically span for several years, these shall be considered as part of the user’s personal profile

#### Assets and Liabilities

* Help text “Asset and Liability at the end of the year (applicable in a case where total income exceeds Rs.50 lakh).”
* Do you own any immovable asset? (Dropdown with values Yes/No)

#### Details of Immovable Assets

If the user selects “yes” to the question regarding immovable assets, then this section shall become visible

* Description(Textbox)
* Flat/Door No(Textbox)
* Name of premise(Textbox)
* Road/Street(Textbox)
* Area/Locality(Textbox)
* State(Drop Down)
* Country(Drop Down)
* PIN Code(Drop Down)
* Amount(Textbox)
* Applicant shall be able to add more than one immovable assets

#### Details of Movable Assets

If the candidate has movable assets they shall answer the questions below (There shall be a question regarding this before details are requested).

* Jewelry, bullion etc.(Textbox)
* Archaeological collections, drawings, painting, sculpture or any work of art (Textbox)
* Vehicles, yachts, boats and aircrafts (Textbox)
* Financial asset

1. Bank (including all deposits)
2. Shares and securities
3. Insurance policies
4. Loans and advances given
5. Cash in hand

#### Interest held in the assets of a AOP?

Do you have any Interest held in the assets of a firm or association of persons (AOP) as a partner or member thereof?

* Name of Firm (Text box)
* Flat/Door No (Text box)
* Name of Premise (Text box)
* Road/Street(Text box)
* Area/Locality(Text box)
* State(Drop Box)
* Country(Drop Box)
* PIN Code(Drop Box)
* PAN of the firm(Text box)
* Assessee's Investment in Firm(Text box)
* Applicant shall add one or more of these items if true

#### Liability in relation to Assets at (A+ B+ C)

* Liability in relation to Assets at (A+ B+ C) (Text box)

##### Upload Foreign Asset details

* Select Foreign Asset document (File Uploader)

File Type (Drop Down): Foreign Assets

* Enter the document password(Text box)
* Upload document (Button)

### BOP (Basis of Partnership)

BOP is a statement that the Applicant agrees to before filing their taxes with PWC. The client shall agree to the BOP before they can submit their application to PWC. Once the user accepts the BOP the “Submit” button becomes enabled.

### Submit for Tax Preparation

This page contains below tabs and applicant shall navigate to the corresponding details by selecting that. A Submit button shall be provided to submit the information entered.

* Personal Information
* Address
* Income Sources
* Deductions
* Taxes Paid
* Bank Details
* Assets & Liabilities

#### Partial Profile Completion

During the process of completing the user tax profile, any button that indicates a “Save” / “Next” / “Continue” / “Submit” etc. shall cause the application to save the data entered by the user. This will help the user to continue from where they left off because of an application failure or due to lack of time

## Application Features

### Status Updates

The application shall send status updates to the user via email whenever the user needs to be updated of an important state in the application process. These status states include

* User has successfully submitted a request for tax preparation to PWC
* PWC issues a status of “In process”
* PWC issues a status of “Need more information”
* PWC issues a status of “Processing failure”
* PWC issues a status of “Upgrade to xxxx package recommended”
* PWC issues any other status that prevents it from processing the application further

Status emails shall contain pertinent information for the user to take action. Such information may consist of

* PWC contact person, email and phone number
* Status of the application
* Cause of error
* Any other information that may be useful

### Account Upgrade

If PWC recommends an upgrade to an existing account, then the user shall be informed via their dashboard that the accounts needs to be upgraded for better quality of service. A link shall be provided that directs the user to the payment gateway with the amount charged to upgrade the user’s service (package)

### Additional Document Updates

Users shall upload additional documents required or received from other sources. Users shall upload the document by indicating the Document type being uploaded.

Document Types being

* Form16-Salary statement
* Other Income
* Housing loan interest Certificate
* Sale of Shares/Debentures
* Sale of Land or Building
* Sale of Any Other Asset
* Sale of Mutual Funds
* 26 AS
* Foreign Assets

### Auditing and Logging

Users and their actions that pertain to the need for auditing and logging shall be captured by the application. Some events that shall be audited or logged include

* Incorrect password entries
* Failed authentication after the third attempt
* Important status updates and status changes
* Email notifications

### Exception handling

Exceptions that occur on web application or on the middle tier systems shall be encoded ina user friendly manner and displayed to the user

### API Services

A list of API Services shall be compiled by Verbat and provided to PWC. This section of the document shall be updated with the list of services and their descriptions.

## Administration

This section of the document shall be given the lowest priority as it does not pertain to the Go-Live version of the product. For the sake of clarity the features covered in this section include

* User Management
* Pricing And Offers
  + Plan & Pricing
  + Refer a friend
  + Promotions
* Services and Offerings
* Reports
  + User Wise reports
    - Payment Details
    - Return Details
    - Status Details
  + Summary Details
    - Tax Year wise
    - Status Wise
    - Tracking and monitoring tools
* Rule based Decision Tree

This section of the document shall be updated with relevant details at an appropriate time.

## User Interface

The user interface shall be responsive.

*Browser Compatibility*

The application developed will be compatible with the browsers listed below:

1. Internet Explorer 11
2. Mozilla Firefox 55 or above
3. Chrome 55 or above
4. MS EDGE
5. Opera 51

## Hardware Interface

Since the application is web-based, it is not dependent on any designated hardware, and it does not have any direct hardware interfaces. However, we recommend the specification mentioned below for the best output.

* Computer with Microsoft Windows XP Professional SP3/Vista SP1/Windows 7 or 8 OS
* Processor: 2.6 GHZ Intel Pentium IV or equivalent
* Memory: 2GB
* Disk Space: 1 GB of free disk space

## Technology for development/Hosting

The application shall be developed using the set of tools/technology listed below.

* **UI/UX Designs**
  + UI Designs – Photoshop CS6
  + HTML – Sublime Text 3
* **Development**
  + VISUAL STUDIO 2015
  + ASP.NET 4.5
  + Database Engine – MS SQL SERVER 2012
  + IIS 8

# Non Functional requirement

## Security

Hardware and network security will be dependent on the selected cloud/hosting service provider’s infrastructure and credentials.

* The system shall use secure sockets in all transactions that include any confidential customer information.
* The system shall automatically log out all customers after a period of inactivity.
* The system shall confirm all transactions with the customer’s web browser or mobile apps.

## Data Storage

* The user interfaces shall never display a customer’s password. It shall always be echoed with special characters representing typed characters.
* The user interfaces shall never display a customer’s credit card number after retrieving from the database. It shall always be shown with just the last four digits of the credit card number.
* The system’s back-end servers shall never display a customer’s password. The customer’s password may be reset but never shown.
* The system’s back-end servers shall only be accessible to authenticated administrators.

|  |  |
| --- | --- |
| **ITEM** | **REQUIREMENT** |
| Handling Sensitive Data | Insensitive data such as company name, documents processed, relevant dates, noncompliance data. could be stored in the database as plain text  Passwords will be encrypted. |
| Security Threats  Prevention | The application will be hosted on a web server that implements SSL (HTTPS). Passwords will be encrypted. Protection against SQL injection will be implemented  Protection against Cross browser hacks and cross-site scripting (XSS) will be implemented. |
| Access Control | Access control for the application will be Role based. Individual users will be authenticated with passwords and authorized to access different parts of the site depending upon assigned roles. |
| HTTPS | Application will support both HTTP and HTTPS. |
| Changing Passwords | User will be allowed to change password by providing his original password and typing the new password 2 times. |
| Forgotten Passwords | Forgotten passwords can be reset by providing an email address attached to the account. A token-based link with expiry will be send to the email for reset of the password. |

## Usability

|  |  |
| --- | --- |
| **ITEM** | **REQUIREMENT** |
| User Interface | The application developed will be best viewed in the resolution 1280px by  768px. The application will be responsive and will be available for mobile |
|  | devices as well as on a desktop web browser |
| Tab Sequence | Forward and backward tab sequences will be maintained in the form. |
| Transactions | Transactions will be ACID (Atomic, Consistent, Isolated and Durable) where required. |

We look forward to hearing from you soon and hope that you will give us the privilege to work with you in meeting your business goals. Thank you.

Thank You



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