**MOBILE APP**

**Login & Home Page:**

1. Requires Splash screen.
2. Requires User Registration in Mobile App (Email Verification using Company Domain).
3. Home screen should have the following three Menus:
4. Register
5. Login
6. Pricing
7. Video and Tax Date Count Down should be displayed in Home Page. (Tax date to be managed in admin)
8. Upon clicking the last Plan (Platinum Plan), show a confirmation to the logged-in user that a notification will be sent to the Admin. Should send a notification to Admin, mail to support and admin. Should log all the clicks on this plan.
9. The system should alert the user during Multiple Login. Upon clicking “Confirm”, the system should log out the user from the previous session.
10. PwC needs to provide confirmation regarding Auto Login Feature. Also requires Confirmation regarding the swapping option for multiple users log in (similar to Gmail)

**Pricing:**

1. Features of a plan should be displayed in Tiles.
2. Should highlight all Common items.
3. Each plan should have a Compare Button which shows the comparison of the particular plan from other plans.

**Dashboard:**

1. Replace Yearly Summary with Plan Summary.
2. Details of the current financial year should be displayed by default.
3. Requires a financial year drop down.
4. Display Credit Amount (if any) in the dashboard.

**Data Gathering Wizard:**

1. Primary Bank Tab and Secondary Bank tab should be combined as a single tab. (Keep a checkbox “IsPrimary” to differentiate primary bank).
2. Group the XML prefilled fields as a separate section.
3. Shrink all the sections in “Deductions” Tab (except Section 80G) in a Dropdown/Combo box with Search option using Keywords. Order of the sections in the Dropdown/Combo box and Search Keywords need to be provided by PwC.
4. Each Page in the Data Gathering wizard should list the data in a grid with one or two primary information. Should Provide an ‘Add’ Button at the bottom, clicking on which should allow the user to add data. Clicking on a row in the Grid should take the user to the detail page with Edit and Delete option.
5. Should be able to select the currency in all fields.

**Income from Salary Section:**

1. Pwc needs to mention the fields which are prefilled from the XML and also the fields that must be filled by the User.
2. Foreign Assets should be a separate tab with an Upload Section and other sections. The Sections and their corresponding fields need to be provided by PwC.
3. Pwc needs to confirm if google drive/Dropbox to be integrated for fetching XML file.

**Summary and review:**

1. Display all the main sections. Clicking on each section should show the subsections under it. Click on the subsection should redirect the user to the corresponding data gathering wizard.
2. Provide a checkbox “Are you a FEMA Resident?”. Capture the data and send it along with JSON.
3. Display the change in Plan (based on the data entered by the user) in the “Service Details” section.

**WEB APP**

**Changes in Registration Section:**

1. Replace IP Management with Company domain.
2. Requires a new text field “PwC Contact Person” in Company Registration section.
3. When a new user registers in the system, an email should be sent to the Company notifying that a new user registers.
4. Already registered user should have the option to change his/her Email with a different domain. (The domain should be already registered with TaxBreeze).

**Change in Home Page:**

1. Upon clicking the last Plan (Platinum Plan), show a confirmation to the logged-in user that a notification will be sent to the Admin. Should send a notification to Admin, mail to support and admin. Should log all the clicks on this plan.

**Changes in the Dashboard:**

1. Requires a “Revise Return” Button. Upon clicking the button, Customer Status should change to “In Progress”. The Payment amount while submitting the return should be the sum of Revise Return fee and differential amount (based on plan change).
2. Requires two tabs in “Tax summary” Section named “Original” and “Revised Return”. “Revised Return” Tab should be the default.
3. Display Credit Amount (if any) in the dashboard.

**Changes in Data Gathering Wizard:**

1. Group the XML prefilled fields as a separate section.
2. Shrink all the sections in “Deductions” Tab (except Section 80G) in a Dropdown/Combo box with Search option using Keywords. Order of the sections in the Dropdown/Combo box and Search Keywords need to be provided by PwC.
3. Should be able to select the currency in all the Amount fields.
4. **Income from Salary Section:** Pwc needs to mention the fields which are prefilled from the XML and also the fields that must be filled by the User.
5. Foreign Assets should be a separate tab with an Upload Section and other sections. The Sections and their corresponding fields need to be provided by PwC.

**Changes in Summary and Review Page:**

1. Display all the main sections. Clicking on each section should show the subsections under it. Click on the subsection should redirect the user to the corresponding data gathering wizard.
2. Provide a checkbox “Are you a FEMA Resident?”. Capture the data and send it along with JSON.
3. Display the change in Plan (based on the data entered by the user) in the “Service Details” section.

**CMS**

**General:**

1. The system will have a pre-defined ‘Super Admin’ User.
2. Super admin can add more than one admins.
3. Admin passwords can be sent through Email.
4. Login page requires a ‘Forgot Password’ link.
5. All the actions should be logged for Auditing purpose.
6. Should be able to set the Countdown in the Home Page of Web Application through CMS.

**Dashboard:**

1. The dashboard should provide analysis on the following: (As an example)
2. Number of Companies
3. Number of site Users
4. Number of Re-submits

**Site Users:**

1. **Transactions:**
2. Provide a ‘Company’ dropdown.
3. List users based on the Company.
4. UserId and PAN No. should be removed from the grid.
5. Provide a column ‘Company Name’ in the grid.
6. Customer status should also be shown in the Grid. Admin should be able to change the status. The system should prompt for a Confirmation while changing the Status.
7. ‘Lock/Unlock’ option should be removed from the grid. Instead, provide ‘Enable/Disable’ option. Locked Users should be unlocked through OTP.

**Corporate Client:**

1. Provide ‘Discount’ button in the grid, clicking on which should list all the plans with the discount percentage.
2. Provide a textbox to add Company domain in the Add Company.

**Notifications:**

Notifications should be of three types:

1. Generic (Example: Due date extensions)
2. User-wise (Example: User Plan change, New user added, Customer Status in Pending-Approval)
3. Company-wise (Example: New Company Added)

Also requires Email and SMS Notifications.

**Plans:**

1. List all the Plans.
2. Clicking on a plan should show all the plan Inclusions.
3. Inclusions should be handled in master data.
4. Duplicate in plans (with inclusions) should be allowed.

**Video:**

1. Should be able to browse and upload.
2. Provide delete option.
3. PwC needs to confirm details regarding Video Upload. Uploading video files through the application will take pretty much time, because of the size of the video. So, Verbat recommends Youtube/Vimeo.

**Help Centre:**

1. Should be able to add Category and description for each category.
2. Should have short description and long description.

**Resubmit Returns:**

Admin should be able to resubmit returns if submit by user fails.

**Revise Return:**

1. List all the plans with revise return amount for each plan.
2. Should have add, edit, delete buttons.

**Master Data:**

1. Bank Name, IFSC Code and Promo Code should be removed from Master data Management.
2. ‘Tax Filing Status’ should be changed to ‘Customer Status’.
3. A Disabled Master Data items will not be available in the front end for future use.

**Reports:**

The application should provide the following reports:

1. Client-wise Report
2. User-wise Report
3. Status-wise Report
4. Plan-wise Report
5. Year-wise Report