roid

Level 3, PTC Tower

Nanthancode

Trivandrum, Kerala

Tel: +91 471 2103295

Email: india@verbat.com

SOFTWARE REQUIREMENT SPECIFICATION

**TaxBreeze**

|  |  |
| --- | --- |
| **Prepared for:**  **PricewaterhouseCoopers Private Limited**  Nesco IT Building III, 8th Floor, Nesco IT Park, Nesco Complex,  Gate No. 3 Western Express Highway, Goregaon East Mumbai – 400 063 | **Submission Date:**  **Proposal ID:** |

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
Conﬁdentiality Notice: This Proposal is conﬁdential and contains proprietary information and intellectual property of Verbanet Technologies LLC. Neither this proposal nor any of the information contained herein may be reproduced or disclosed under any circumstances without the express written permission of Verbanet.

© 2018 by Verbanet Technologies LLC. All rights reserved. Confidential.

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Revision History

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

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Revision #** | **Revision Date** | **Description of Change** | **Author** | **Comments** |
| 1.0 | 16 October 2018 | Initial draft | Anusha R J |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

Document Approval

This document has been accepted and approved by the following:

|  |  |  |  |
| --- | --- | --- | --- |
| **Signature** | **Printed Name** | **Title** | **Date** |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

**Table of Content**

[1 Introduction 4](#_Toc527548086)

[1.1 Overview of the Document 4](#_Toc527548087)

[1.2 Product Perspective 4](#_Toc527548088)

[2 General description 4](#_Toc527548089)

[2.1 Assumptions & Dependencies 4](#_Toc527548090)

[3 Functional requirement 5](#_Toc527548091)

[3.1 Requirement Summary 5](#_Toc527548092)

[3.1.1 Login 5](#_Toc527548093)

[3.1.2 Logout 5](#_Toc527548094)

[3.1.3 Change Password 5](#_Toc527548095)

[3.1.4 Dashboard 5](#_Toc527548096)

[3.1.4.1 User Management 6](#_Toc527548097)

[3.1.4.2 Site Users 6](#_Toc527548098)

[3.1.4.2.1 End User Transactions 6](#_Toc527548099)

[3.1.4.2.2 End User Listing 6](#_Toc527548100)

[3.1.4.2.3 Unlock users 6](#_Toc527548101)

[3.1.4.3 Manage Corporate Clients 6](#_Toc527548102)

[3.1.4.4 Notifications 6](#_Toc527548103)

[3.1.4.5 Plan management 6](#_Toc527548104)

[3.1.4.6 Price management 7](#_Toc527548105)

[3.1.4.7 Help Center Content Management 7](#_Toc527548106)

[3.1.4.8 Video Management 7](#_Toc527548107)

[3.1.5 Resubmission of Returns 7](#_Toc527548108)

[3.1.6 Revise Returns 7](#_Toc527548109)

[3.1.7 Master Data Management 7](#_Toc527548110)

[4 Other Requirements 8](#_Toc527548111)

[4.1 User Interface 8](#_Toc527548112)

[4.2 Hardware Interface 8](#_Toc527548113)

[4.3 Technology for development/Hosting 8](#_Toc527548114)

[5 Non Functional requirement 9](#_Toc527548115)

[5.1 Documentations 9](#_Toc527548116)

[5.2 Security 9](#_Toc527548117)

[5.3 Data Storage 9](#_Toc527548118)

[5.4 Usability 10](#_Toc527548119)

# 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 admin part of “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.

# General description

## Assumptions & Dependencies

One assumption of this application is that it will be using a compatible browser connected to Internet, which are 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 those mentioned in this document.
* 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

# Functional requirement

The application being developed shall have the admin part in order to manage the data and other related activities. The admin has the overall access to the application.

## Requirement Specification

The website will 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.

### Login

It allows only authorized user to access the application. After entering login details clicking on Login button directs the user to admin dashboard.

| **REQUIREMENT ID (RID)** | **DESCRIPTION** | [**PRIORITY LEVELS**](file:///C:\Users\Verbat\Desktop\pmp\requirements\Requirements_Gathering_Guidelines_and_Checklists_2.xls#'Document Conventions'!_Toc136410958)  (P1,P2,P3,P4) | [**EFFORT REQUIRED**](file:///C:\Users\Verbat\Desktop\pmp\requirements\Requirements_Gathering_Guidelines_and_Checklists_2.xls#'Document Conventions'!_Toc136410958)  (H,M,L) |
| --- | --- | --- | --- |
| 3.1.1 | * Username * Password * Sign In Button | P1 | H |

### Logout

Clicking on logout option from the dropdown redirects admin to the login page.

| **REQUIREMENT ID (RID)** | **DESCRIPTION** | [**PRIORITY LEVELS**](file:///C:\Users\Verbat\Desktop\pmp\requirements\Requirements_Gathering_Guidelines_and_Checklists_2.xls#'Document Conventions'!_Toc136410958)  (P1,P2,p3,P4) | [**EFFORT REQUIRED**](file:///C:\Users\Verbat\Desktop\pmp\requirements\Requirements_Gathering_Guidelines_and_Checklists_2.xls#'Document Conventions'!_Toc136410958)  (H,M,L) |
| --- | --- | --- | --- |
| 3.1.2 | * Logout Button | P1 | L |

### Forgot Password

When the user clicks the forgot password link, the page directs to Forgot password page asking for the mail id. Once the user enters the mail id and on clicking the Submit button, a mail with the reset password link will be sent to the admin’s mail id.

### Change Password

Clicking on change password option from the dropdown directs admin to the Change Password page. After entering current password, new password and confirm password fields, click on submit button to change the password.

| **REQUIREMENT ID (RID)** | **DESCRIPTION** | [**PRIORITY LEVELS**](file:///C:\Users\Verbat\Desktop\pmp\requirements\Requirements_Gathering_Guidelines_and_Checklists_2.xls#'Document Conventions'!_Toc136410958)  (P1,P2,p3,P4) | [**EFFORT REQUIRED**](file:///C:\Users\Verbat\Desktop\pmp\requirements\Requirements_Gathering_Guidelines_and_Checklists_2.xls#'Document Conventions'!_Toc136410958)  (H,M,L) |
| --- | --- | --- | --- |
| 3.1.4 | * Current Password field * New Password field * Confirm Password field * Submit Button | P1 | H |

### Dashboard

Admin Dashboard shall provide the system with the features like the count of companies added, the count of users added, notifications etc. along with the menu. The menu includes the following options.

#### User Management

Admin can manage the user details. Admin will have the provision to Add/Edit/Delete user and also to manage users with their roles and entitlements.

##### Admin Users

The list of admin users will be displayed here. Here User Id, Name, Email Id, Contact Number and the corresponding roles will be displayed. More admin users can be added by using add button.

| **REQUIREMENT ID (RID)** | **DESCRIPTION** | [**PRIORITY LEVELS**](file:///C:\Users\Verbat\Desktop\pmp\requirements\Requirements_Gathering_Guidelines_and_Checklists_2.xls#'Document Conventions'!_Toc136410958)  (P1,P2,p3,P4) | [**EFFORT REQUIRED**](file:///C:\Users\Verbat\Desktop\pmp\requirements\Requirements_Gathering_Guidelines_and_Checklists_2.xls#'Document Conventions'!_Toc136410958)  (H,M,L) |
| --- | --- | --- | --- |
| 3.1.5.1.1 | * User Id * Name * Email Id * Contact Number * Roles * Actions | P1 | H |

Add/Edit Admin User

Admin users can be add/edit here.

| **REQUIREMENT ID (RID)** | **DESCRIPTION** | [**PRIORITY LEVELS**](file:///C:\Users\Verbat\Desktop\pmp\requirements\Requirements_Gathering_Guidelines_and_Checklists_2.xls#'Document Conventions'!_Toc136410958)  (P1,P2,p3,P4) | [**EFFORT REQUIRED**](file:///C:\Users\Verbat\Desktop\pmp\requirements\Requirements_Gathering_Guidelines_and_Checklists_2.xls#'Document Conventions'!_Toc136410958)  (H,M,L) |
| --- | --- | --- | --- |
| 3.1.5.1.1.1 | * User Id * Name * Email Id * Contact Number * Save button * Cancel button | P1 | H |

##### Site Users

The list of users will be displayed here. Here User Id, Name, Email Id, PAN, Contact Number, Enabled/Disabled field will be displayed. The Administrator will have the provision to unlock users. Users become locked out when they exceed the password locking rules, the number of failed login attempts, or the days of inactivity.

| **REQUIREMENT ID (RID)** | **DESCRIPTION** | [**PRIORITY LEVELS**](file:///C:\Users\Verbat\Desktop\pmp\requirements\Requirements_Gathering_Guidelines_and_Checklists_2.xls#'Document Conventions'!_Toc136410958)  (P1,P2,p3,P4) | [**EFFORT REQUIRED**](file:///C:\Users\Verbat\Desktop\pmp\requirements\Requirements_Gathering_Guidelines_and_Checklists_2.xls#'Document Conventions'!_Toc136410958)  (H,M,L) |
| --- | --- | --- | --- |
| 3.1.5.1.2 | * User Id * Name * Email Id * Contact Number * PAN Number * Enabled/Disabled * Locked/Unlocked   Filters   * Name * User Id * Year wise list | P1 | H |

#### Site User Transactions

Here admin can manage the end user transactions like billing, invoicing and transaction summary.

| **REQUIREMENT ID (RID)** | **DESCRIPTION** | [**PRIORITY LEVELS**](file:///C:\Users\Verbat\Desktop\pmp\requirements\Requirements_Gathering_Guidelines_and_Checklists_2.xls#'Document Conventions'!_Toc136410958)  (P1,P2,p3,P4) | [**EFFORT REQUIRED**](file:///C:\Users\Verbat\Desktop\pmp\requirements\Requirements_Gathering_Guidelines_and_Checklists_2.xls#'Document Conventions'!_Toc136410958)  (H,M,L) |
| --- | --- | --- | --- |
| 3.1.5.2 | * User Id * Name * Email Id * Bill Number * Invoice Number * Transaction Summary link   Filters   * Name * User Id * Year wise list * Bill Number * Invoice Number | P1 | H |

On clicking the Transaction Summary link, the whole details of the transaction summary pop up appears.

#### Manage Corporate Clients

Admin can manage corporate clients here. Admin will have the provision to add, edit and delete corporate client. Admin can Approve or Reject the corporate clients. Also IP Management with respect to corporate client will be done in the IP Management section.

##### Corporate Clients List

| **REQUIREMENT ID (RID)** | **DESCRIPTION** | [**PRIORITY LEVELS**](file:///C:\Users\Verbat\Desktop\pmp\requirements\Requirements_Gathering_Guidelines_and_Checklists_2.xls#'Document Conventions'!_Toc136410958)  (P1,P2,p3,P4) | [**EFFORT REQUIRED**](file:///C:\Users\Verbat\Desktop\pmp\requirements\Requirements_Gathering_Guidelines_and_Checklists_2.xls#'Document Conventions'!_Toc136410958)  (H,M,L) |
| --- | --- | --- | --- |
| 3.1.5.3.1 | * Company name/Business name * Name * Email Id * Status(New/Approved/Rejected) | P1 | H |

On clicking on Company name, a pop up appears showing all the details of the Corporate Client. Admin should go through those details and can approve or reject the company.

Add/Edit Company

Admin can add or edit company details here. For users who need employ assist services, they have to provide with their GST Number and Address for billing.

| **REQUIREMENT ID (RID)** | **DESCRIPTION** | [**PRIORITY LEVELS**](file:///C:\Users\Verbat\Desktop\pmp\requirements\Requirements_Gathering_Guidelines_and_Checklists_2.xls#'Document Conventions'!_Toc136410958)  (P1,P2,p3,P4) | [**EFFORT REQUIRED**](file:///C:\Users\Verbat\Desktop\pmp\requirements\Requirements_Gathering_Guidelines_and_Checklists_2.xls#'Document Conventions'!_Toc136410958)  (H,M,L) |
| --- | --- | --- | --- |
| 3.1.5.3.1.1 | * Company name/Business name * Name * Email Id * Contact Number * Password * Save button | P1 | H |

##### IP Management

Admin has to add IP’s for the approved users. On clicking company name from the approved users list, a pop up appears with a field to add Company IP, save button and send mail button.

| **REQUIREMENT ID (RID)** | **DESCRIPTION** | [**PRIORITY LEVELS**](file:///C:\Users\Verbat\Desktop\pmp\requirements\Requirements_Gathering_Guidelines_and_Checklists_2.xls#'Document Conventions'!_Toc136410958)  (P1,P2,p3,P4) | [**EFFORT REQUIRED**](file:///C:\Users\Verbat\Desktop\pmp\requirements\Requirements_Gathering_Guidelines_and_Checklists_2.xls#'Document Conventions'!_Toc136410958)  (H,M,L) |
| --- | --- | --- | --- |
| 3.1.5.3.2 | * Company name/Business name * Company IP * Save button * Send mail button | P1 | H |

#### Notifications

The notifications for admin when a new user/client gets added will be displayed here. Also the notifications when a user gets locked/when the user submits all details etc. will also get displayed in the notifications section. Admin can update status/upgrade plan and also notify user regarding the updates.

| **REQUIREMENT ID (RID)** | **DESCRIPTION** | [**PRIORITY LEVELS**](file:///C:\Users\Verbat\Desktop\pmp\requirements\Requirements_Gathering_Guidelines_and_Checklists_2.xls#'Document Conventions'!_Toc136410958)  (P1,P2,p3,P4) | [**EFFORT REQUIRED**](file:///C:\Users\Verbat\Desktop\pmp\requirements\Requirements_Gathering_Guidelines_and_Checklists_2.xls#'Document Conventions'!_Toc136410958)  (H,M,L) |
| --- | --- | --- | --- |
| 3.1.5.4 | * Company name/Business name * Assessment Year * Plan * Status * Update Status * Upgrade Plan * Notify User | P1 | H |

#### Plan management

Plan management section lists the plans, corresponding inclusions and amount for plan. Also admin has the provision to Add/Edit/Delete plans.

| **REQUIREMENT ID (RID)** | **DESCRIPTION** | [**PRIORITY LEVELS**](file:///C:\Users\Verbat\Desktop\pmp\requirements\Requirements_Gathering_Guidelines_and_Checklists_2.xls#'Document Conventions'!_Toc136410958)  (P1,P2,p3,P4) | [**EFFORT REQUIRED**](file:///C:\Users\Verbat\Desktop\pmp\requirements\Requirements_Gathering_Guidelines_and_Checklists_2.xls#'Document Conventions'!_Toc136410958)  (H,M,L) |
| --- | --- | --- | --- |
| 3.1.5.5 | * Plan Name * Inclusions * Amount * Actions   Filters   * Assessment Year | P1 | H |

##### Add plan

| **REQUIREMENT ID (RID)** | **DESCRIPTION** | [**PRIORITY LEVELS**](file:///C:\Users\Verbat\Desktop\pmp\requirements\Requirements_Gathering_Guidelines_and_Checklists_2.xls#'Document Conventions'!_Toc136410958)  (P1,P2,p3,P4) | [**EFFORT REQUIRED**](file:///C:\Users\Verbat\Desktop\pmp\requirements\Requirements_Gathering_Guidelines_and_Checklists_2.xls#'Document Conventions'!_Toc136410958)  (H,M,L) |
| --- | --- | --- | --- |
| 3.1.5.5.1 | * Assessment Year * Plan Name * Amount * Inclusions * Save button * Cancel button | P1 | H |

#### Price management

Price management section lists the sources of income applicable to each plan, features of each plan, and the price for the plans.

| **REQUIREMENT ID (RID)** | **DESCRIPTION** | [**PRIORITY LEVELS**](file:///C:\Users\Verbat\Desktop\pmp\requirements\Requirements_Gathering_Guidelines_and_Checklists_2.xls#'Document Conventions'!_Toc136410958)  (P1,P2,p3,P4) | [**EFFORT REQUIRED**](file:///C:\Users\Verbat\Desktop\pmp\requirements\Requirements_Gathering_Guidelines_and_Checklists_2.xls#'Document Conventions'!_Toc136410958)  (H,M,L) |
| --- | --- | --- | --- |
| 3.1.5.6 | * Sources of Income * Plan Name * Plan Features * Price for the plan | P1 | H |

#### Help Center Content Management

Help section is to offer support to the users/clients.

##### Add Category

Admin will be able to add categories

##### Add Queries/Responses

Admin can add possible queries and response based on each categories

##### User/Client Queries

User can send queries to admin. Once admin receives the queries he will leave the reply for the corresponding queries. Also if some queries seems to be repeatedly asking, admin can add it to the FAQ section.

#### Video Management

Admin can upload videos here. Recently uploaded video will be displayed on the front end Home page. Admin will either upload video locally(video will be uploaded from FTP) or by providing any uploaded URL.

### Resubmission of Returns

If the return submission has failed due to time out or some other technical glitches, admin will get notified and give the trigger by resubmitting the application.

### Revise Returns

PWC will revise the data submitted by the user and may sometimes demands for some changes in the data. Admin/User will receive a notification for that. Admin has to maintain the history of updated data.

### Master Data Management

Admin has to manage all the master data. Master data section includes IFSC Code, Bank Name, Investment Category, Account type, Employer Type, Tax Rate, Country, State, Qualifying Percentage, Deduction Age, Financial Year, Tax Filing Status, Plan Types, Promo Codes, Service Types. Admin has to add all these data in this section which will appear as dropdown in the front end.

# Other Requirements

This section contains all of the functional and quality requirements of the system. It gives a detailed description of the system and all its features.

## User Interface

*Browser Compatibility*

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

1. Firefox 55+
2. Chrome 55+
3. Internet Explorer 11

## Hardware Interface

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**
  + Wire Frames – Gliffy (Tool by Google)/Pencil
  + UI Designs – Photoshop CS6
  + Simulation – Sublime Text 3
* **Development**
  + VISUAL STUDIO 2015
  + ASP.NET 4.5
  + Database Engine – MS SQL SERVER 2012
  + IIS 8

# Non Functional requirement

## Documentations

|  |  |
| --- | --- |
| **ITEM** | **RESPONSE/COMMENT** |
| Project documentation requirements | * Requirements document |

## 

## 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 confirm all transactions with the customer’s web browser.

## Data Storage

* The user interfaces shall never display a customer’s password. It shall always be echoed with special characters representing typed characters.
* The system’s back-end servers shall only be accessible to authenticated administrators.

|  |  |
| --- | --- |
| **ITEM** | **REQUIREMENT** |
| Handling Sensitive Data | Insensitive data such as vendor name, documents processed, relevant dates, noncompliance data could be stored in the database as plain text.  Passwords will be encrypted. |
| Security Threats  Prevention | 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 through the AD. Individual users will be authenticated with passwords and authorized to access different parts of the site depending on assigned roles. |
| HTTPS | Application will support both HTTP and HTTPS. |

## Usability

|  |  |
| --- | --- |
| **ITEM** | **REQUIREMENT** |
| Documentation | User manuals and other relevant documents will be provided. |
| Time Zones | The prototype application will have UAE Standard Time as its time zone. Time zones cannot be configured in the current version of the application. Wherever applicable, system date and time will be used to represent logical/business/calendar dates. |
| User Interface | The application will be responsive and will be available for mobile devices as well as on a desktop web browser |
| 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



1999 - 2018. All Rights Reserved   
Verbat Technologies (India) Pvt. Ltd.   
www.verbat.com