roid

Level 3, PTC Towers,

Kuravankonam, YMR Road,

Nanthancodu,

Thiruvananthapuram, Kerala 695003

Tel: +91 471 2103295

Service Requirements

**TaxBreeze**

|  |  |
| --- | --- |
| **Prepared for:**  **PWC** | **Submission Date:**  21 Mar 2018 |

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

© 2018 by Verbat Technologies. All rights reserved. Confidential.

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

Revision History

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Revision #** | **Revision Date** | **Description of Change** | **Author** | **Comments** |
| 1.0 | 21 Mar 2018 | Initial Draft | Lakshmi |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

Document Approval

This document has been accepted and approved by the following:

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

**PWC Service Requirements**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **SNo** | **Type** | **API** | **Request** | **Response** |
| 1 | POST | Social Media Registration - User Validation | { Username/Email/Phone No., Password } | { Status,  Message  } |
| 2 | POST | Social Media Registration – User Registration | {  Email,  Password  } | { Status,  Message  } |
| 3 | POST | PAN Registration - User Registration | { PAN,  Email, Password } | { Status,  Message  } |
| 4 | GET | Account Verification Email |  | { Status,  Message  } |
| 5 | POST | Confirm Eligibility | {  UserID,  Status  } |  |
| 6 | GET | Basic Profile/ID |  | {  First name,  Last name,  Phone,  DOB,  PAN\*  } |
| 7 | POST | Basic Profile/ID | {  First name,  Last name,  Phone,  DOB,  PAN  } | { Status,  Message  } |
| 8 | GET | Plan Options |  | [{  ID,  Name,  Price,  Description  }] |
| 9 | POST | Login | {  PAN,  Password  } | { Status,  Payment Status\*,  Message  } \* 1- New user 2- Not paid for the year 3 – Already paid 4- Upgrade plan |
| 10 | POST | Payment | {  First Name,  Last Name,  PAN,  DOB,  Email,  Phone,  PlanID,  Payment date, Payment amount,  Payment Ref.No  } | { Status,  PWC Ref.No,  Message  } |
| 11 | POST | Upload XML | File Type : XML file  PWC Ref.No, | { Status,  Message  } |
| 12 | GET | Pre-fill Data/PWC Ref No |  | {  First Name,  Middle Name,  Last Name,  Father's Name,  Email ID,  Mobile No.,  Secondary Mobile No.,  Landline No,  Date of Birth,  Gender,  Employer Name,  Employer Type,  PAN Card Number,  Aadhaar Card Number,  Passport Number  } |
| 12 | GET | Pre-fill Data/PAN |  | {  First Name,  Middle Name,  Last Name,  Father's Name,  Email ID,  Mobile No.,  Secondary Mobile No.,  Landline No,  Date of Birth,  Gender,  Employer Name,  Employer Type,  PAN Card Number,  Aadhaar Card Number,  Passport Number  } |
| 13 | GET | Tax Period |  | [{  PeriodID,  Title  }] |
| 14 | GET | Tax summary/PWC Ref.No |  | {  PWC status,  ITR (link),  Tax Calculation document(link)  } |
| 15 | GET | My tax returns/PWC Ref.No/PeriodID |  | [{  Year,  Filed Date  Tax Amt,  Tax Return,  Status  }] |
| 16 | GET | Search/PWC Ref.No/Query |  | [{  Search Details  }] |
| 17 | GET | Document Library /PWC Ref.No/ |  | [{  list all documents  }] |
| 18 | GET | Tax savings/ PWC Ref.No/ |  | {  Tax saved for the current filing,  Basis for the savings calculated,  A statement of comparison with respect to competition  } |
| 19 | GET | Personal information/ PWC Ref.No |  | {  First Name,  Middle Name,  Last Name,  Father's Name,  Email ID,  Mobile No.,  Secondary Mobile No.,  Landline No,  Date of Birth,  Gender,  Employer Name,  Employer Type,  PAN Card Number,  Aadhaar Card Number,  Passport Number  } |
| 20 | POST | Personal information/ PWC Ref.No | {  First Name,  Middle Name,  Last Name,  Father's Name,  Email ID,  Mobile No.,  Secondary Mobile No.,  Landline No,  Date of Birth,  Gender,  Employer Name,  Employer Type,  PAN Card Number,  Aadhaar Card Number,  Passport Number  } | { Status,  Message  } |
| 21 | GET | Address/ PWC Ref.No |  | {  Flat / Door / Block No. ,  Premises / Building / Village,  Road / Street / Post Office,  Area / Locality,  Pin Code,  Town / City / District,  State,  Country  } |
| 22 | POST | Address/ PWC Ref.No | {  Flat / Door / Block No. ,  Premises / Building / Village,  Road / Street / Post Office,  Area / Locality,  Pin Code,  Town / City / District,  State,  Country  } | { Status,  Message  } |
| 23 | POST | Form 16 or Salary Statement | File Type : file  PWC Ref.No,  Doc Password | { Status,  Message  } |
| 24 | POST | Income from salary/ PWC Ref.No | {  Income chargeable under the head ‘Salaries’,  Name of the employer,  Employer Type/ Category } | { Status,  Message  } |
| 25 | POST | TDS for salary/ PWC Ref.No | {  TAN of the Employer,  Tax Deducted at source on Salary  } | { Status,  Message  } |
| 26 | POST | Document upload / PWC Ref.No | File Type : file  PWC Ref.No,  Doc Password | { Status,  Message  } |
| 27 | POST | Other Income / PWC Ref.No | {  Interest Income from Saving Bank and Post office deposits,  Other Interest Income,  [{  Other Interest Income  }],  [{  Dividend earned,  Exempt interest income,  Other miscellaneous exempt Income  }],  [{  Gross Agriculture Receipt,  Expenditure On Agriculture,  Unabsorbed Agriculture Loss  }],  [{  Amount  Name of Person  Relationship  Nature of Income  }],  PF Amount ,  Tax rate  } | { Status,  Message  } |
| 28 | POST | House Property/ PWC Ref.No | [{  Flat / Door / Block No. ,  Road / Street / Post Office,  Area / Locality,  Pin Code,  Town / City / District,  State,  Country,  Is there any Housing loan applicable on this property?,  Interest paid on loan for self occupied property,  Is your Property Co-owned?,  Your ownership share of the Property (Percentage %),  [{  Name,  PAN No,  %Share  }]  }] | { Status,  Message  } |
| 29 | POST | upload housing loan interest certificate / PWC Ref.No | File Type : file  PWC Ref.No,  Doc Password | { Status,  Message  } |
| 30 | POST | Rental property / PWC Ref.No | [{  Flat / Door / Block No. ,  Road / Street / Post Office,  Area / Locality,  Pin Code,  Town / City / District,  State,  Country,  Annual Rent Received by you,  House Tax paid by you ,  Name of Tenant,  PAN of Tenant,  Is there any Housing loan applicable on this property?,  Interest paid on loan for Rental property,  Unrealized Rent Amount,  Is your Property Co-owned?,  Your ownership share of the Property (Percentage %),  [{  Name,  PAN No,  %Share  }]  }] | { Status,  Message  } |
| 31 | POST | upload rental housing loan interest certificate / PWC Ref.No | File Type : file  PWC Ref.No,  Doc Password | { Status,  Message  } |
| 32 | POST | Capital Gain / PWC Ref.No | File Type : file  PWC Ref.No,  Document Type,  Doc Password | { Status,  Message  } |
| 33 | POST | Deductions / PWC Ref.No | {  Investment for Section 80C,  Medical Insurance Premium,  Preventive Health Check-Up fees,  Medical Insurance Premium for your parents,  Are your parents who hold the policy senior citizens?,  Interest earned on Savings Bank Account,  } |  |
| 34 | POST | Donations to charitable organizations / PWC Ref.No | [{  Name of Donee,  Donation Amount,  PAN of Donee,  Limit of Deduction,  Qualifying Percentage,  PIN Code,  Address,  Town / City,  State  }] | { Status,  Message  } |
| 35 | POST | More Deductions / PWC Ref.No | {  Investment made under Rajiv Gandhi Equity Saving Scheme,  Interest on higher education loan paid this year,  Contribution amount to Pension Plan / Annuity Fund for Section 80CCC,  Contribution towards Section 80CCD(1),  Employer’s contribution towards NPS (up to 10% of Salary),  Rent Paid Per Month,  Number of month’s Rent Paid,  Medical Treatment Costs for specified Diseases under Section 80DDB,  Age of person for whom deduction is being claimed,  Deductions under Section 80EE,  Enter the deduction amount,  Enter the deduction amount,  Contribution to Research & Development or Rural Development,  Contribution or Donations to Political Party,  } | { Status,  Message  } |
| 36 | POST | Upload 26AS / PWC Ref.No | File Type : file  PWC Ref.No,  Doc Password | { Status,  Message  } |
| 37 | POST | Challan Details / PWC Ref.No | [{  BSR Code,  Date of Payment,  Challan Sr. No,  Tax Paid }] | { Status,  Message  } |
| 38 | POST | Bank Accounts / PWC Ref.No | {  Account Number,  Account Type,  Name of Bank,  IFS Code,  [{  Account Number,  Account Type,  Name of Bank,  IFS Code  }]  } | { Status,  Message  } |
| 39 | POST | Assets and Liabilities / PWC Ref.No | {  Do you own any immovable asset? ,  [{  Description, Flat/Door No Name of premise, Road/StreetArea/Locality, State, Country, PIN Code, Amount }], Jewelry, bullion etc, Archaeological collections, drawings, painting, sculpture or any work of , Vehicles, yachts, boats and aircrafts, Bank (including all deposits), Shares and securities, Insurance policies, Loans and advances given, Cash in hand, [{ Name of Firm, Flat/Door , Name of Premise , Road/Street, Area/Locality, State, Country, PIN Code, PAN of the firm, Assessee's Investment in Firm }], Liability in relation to Assets } | { Status,  Message  } |
| 40 | POST | Upload Foreign Asset details / PWC Ref.No | File Type : file  PWC Ref.No,  Doc Password | { Status,  Message  } |
| 41 | GET | Tax Preparation / PWC Ref.No/PeriodID |  | { Submitted User Details  } |

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  
www.verbat.com