



Tax Deductor and Collector User Registration and Services

Tax Deductor and Collector User Registration and Services

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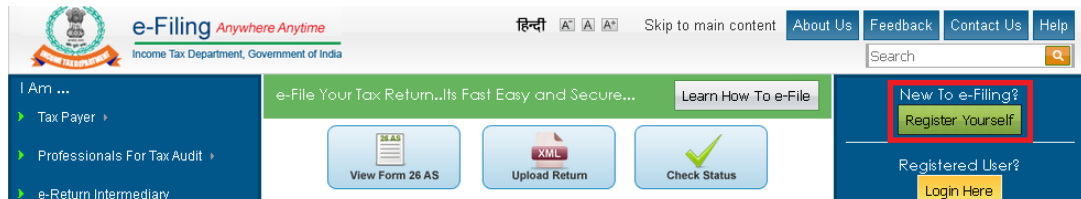
Tax Deductor and Collector User Registration

Pre-requisites for registering in the e-Filing application.

- User must have a valid TAN.

Registration Process for New Users

- Type the URL of e-Filing application in a browser.
(<https://incometaxindiaefiling.gov.in>)



- Click on the '**Register Yourself**' button and select '**Tax Deductor and Collector**'. Click on Continue.

Registration Form

Select User Type *

Individual/HUF

☐ Individual ☐ HUF

Other than Individual/HUF

☐ Company ☐ Body of Individuals (BOI) ☐ Local Authority ☐ Firm

☐ Trust ☐ Association of Persons (AOP) ☐ Artificial Juridical Person

☐ Government

Bulk PAN Verification Users

☐ External Agency

Tax Professional

☐ Chartered Accountants

☒ **Tax Deductor and Collector**

☐ Third Party Software Utility Developer

Continue

Note: Instructions are provided on the right-hand side of the screen.

- Click Continue.

Tax Deductor and Collector User Registration and Services

Registration Form - Tax Deductor and Collector

Step 1: Enter Basic Details

Step 2: Registration Form

Step 3: Registration Successful

The screenshot shows a web form for registration. At the top, there are three steps: 'Step 1: Enter Basic Details', 'Step 2: Registration Form', and 'Step 3: Registration Successful'. The first step is active. Below the steps, there is a form with a label 'TAN *' and a text input field containing 'AAAA00000A'. Below the input field is a green button labeled 'Continue'.

- Enter the TAN and Click Continue.
- User will be redirected to the page where he can login to TRACES.

Instructions for Tax Deductor and Collector Registration

- ♦ Register with **TRACES**.
 - ♦ Login to TRACES
 - ♦ Post login use the option Register with eFiling
-
- Click on "**TRACES**" link from the Instructions.

Note:

- ✓ Existing users of TRACES has to Login to Traces and click the link "**Register with e-Filing**".
 - ✓ Non-Existing users of TRACES must register with TRACES before registering their TAN with e-filing portal
-
- The User is redirected to e-Filing TAN Registration Page.

Tax Deductor and Collector User Registration and Services

A. **Password Details**

- User ID – This will be automatically populated and non-editable.
- Password – Mandatory, should be between 8 – 14 characters, alphanumeric and should contain at least one special character and one numeric.
- Confirm Password – The user has to enter the same password as entered above. This is mandatory.
- Primary Secret Question – The user needs to select any one question available in the drop down. This is mandatory.
- Primary Secret Answer – Mandatory, alphanumeric and special characters, limited to 25 characters
- Secondary Secret Question – The user needs to select any one question available in the drop down. This is mandatory.
- Secondary Secret Answer – Mandatory, alphanumeric and special characters, limited to 25 characters

B. **Authorized Person [Person Responsible for Deduction/collection] Details**

- PAN - Mandatory, 10 characters alphanumeric.
- Designation – Mandatory, alphanumeric and can contain special characters, limited to 75 characters
- Surname – Mandatory, alphanumeric and can contain special characters, limited to 75 characters
- First Name – Not mandatory, alphanumeric and can contain special characters, limited to 25 characters
- Middle Name - Not mandatory, alphanumeric and can contain special characters, limited to 25 characters
- Date of Birth – Mandatory, select the date from the calendar provided, and should match the date as given in the PAN card
- Aadhaar Number – Not mandatory, numeric field, limited to 12 characters
- Mobile Number - Mandatory, numeric field, 10 digits.
- Secondary Mobile Number - Non mandatory, numeric field, 10 digits
- Email ID - Mandatory, alphanumeric, 125 characters
- Secondary Email ID – Non Mandatory, alphanumeric, 125 characters

C. **Organization Details**

- Organization name – auto filled and non-editable.
- Date of TAN Allotment - auto filled from Database and non-editable
- PAN of the Organization - Mandatory, 10 characters alphanumeric
- Organization Name(As in PAN) - Mandatory, up to 75 characters
- Reasons if PAN not Available - Mandatory, a dropdown
- AIN / BIN – Non mandatory, numeric field, 14 digits
- Landline Number- Mandatory, numeric field, 10 digits (STD code and the telephone number should not exceed 10 digits. Do not prefix '0').
- Fax Number- Mandatory, numeric field, 10 digits (STD code and the telephone number should not exceed 10 digits. Do not prefix '0').

D. Corporate office Postal Address

- Flat/Door/Building – Mandatory, alphanumeric and special characters, limited to 50characters
- Road/Street - Non-mandatory, alphanumeric and special characters, limited to 50characters
- Area/Locality - Mandatory, alphanumeric and special characters, limited to 50characters
- Town/City/District - Mandatory, alphanumeric and special characters, limited to 50characters
- State – Mandatory, user selects from the drop down provided
- Pin code - Mandatory, numeric, limited to 6digits

E. Subscribe to Mailing List

- This will be auto-selected. User can un-check the box provided to un-subscribe for mailing list.

F. Enable Alerts, Reminders and Notifications

- This will be auto-selected. User can un-check the box provided to disable alerts, reminders and notification.

G. Captcha Code

- This is mandatory and the user has to type in the numeric code which appears on the screen.


Tax Deductor and Collector User Registration and Services

Registration Form - Tax Deductor and Collector

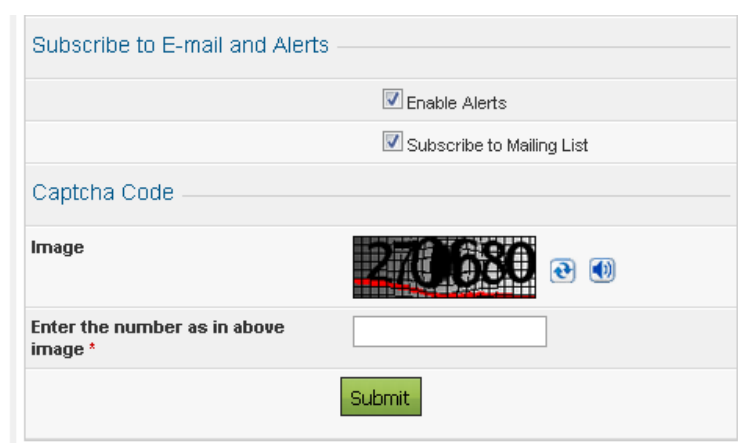
Step 1: Enter Basic Details

Step 2: Registration Form

Step 3: Registration Successful

User ID :	AAAA10003A		
Password Details			
Password *	<input type="password"/>	Zero Length ■■■■■■■■	
Confirm Password *	<input type="password"/>		
Primary Secret Question *	Select ▼		
Primary Secret Answer *	<input type="password"/>		
Secondary Secret Question *	Select ▼		
Secondary Secret Answer *	<input type="password"/>		
Authorized person Details			
PAN *	<input type="text"/>		
Designation *	<input type="text"/>		
Surname *	<input type="text"/>		
Middle Name	<input type="text"/>		
First Name	<input type="text"/>		
Date of Birth (DD/MM/YYYY) *	<input type="text"/>		
Aadhaar Number	<input type="text"/>		
Mobile Number *	+91	<input type="text"/>	
Secondary Mobile Number	+91	<input type="text"/>	
E-mail ID *	<input type="text"/>		
Secondary E-mail ID	<input type="text"/>		
Organization Details			
Organization Name	ABC COMPANY		
Date of TAN Allotment (DD/MM/YYYY)	19/02/2014		
PAN of the Organization *	AAPA0000A		
Organization Name(As in PAN) *	KARTHIK		
Reasons if PAN not Available	Select ▼		
AIN /BIN	<input type="text"/>		
Landline Number *	+91	<input type="text"/>	<input type="text"/>
Fax Number *	+91	<input type="text"/>	<input type="text"/>
Corporate Office Postal Address			
Flat/Door/Building *	<input type="text"/>		
Road/Street	<input type="text"/>		
Area/Locality *	<input type="text"/>		
Town/City/District *	<input type="text"/>		
Pincode *	<input type="text"/>		
State *	Select ▼		

Tax Deductor and Collector User Registration and Services



- User clicks on '**SUBMIT**'. A successful TAN registration message would be displayed. The user records are captured in the e-Filing application.
- If Organization PAN is present:
 - ❖ The request for Registration Approval would be forwarded to Organization PAN's Work list.
 - ❖ Organization PAN User will have to Login to e-Filing with PAN of the Organization.
 - ❖ Navigate to **Worklist** → **For Your Action**.
 - ❖ The Organization PAN User either can approve or reject the Registration request.
 - ❖ The Registration Status will be shared to the Authorized Person's e-mail id. Activation link is sent on approval to email id.
 - ❖ If Organization PAN User rejects the request, the TAN User can re-register in e-Filing.
- If Organization PAN is not present:
 - ❖ The Authorized Person receives a confirmation e-mail along with the activation link to the registered Email ID.

Registration Form - TDS Registration

Step 1: Enter Basic Details

Step 2: Registration Form

Step 3: Registration Successful

Thank you for registering in e-Filing. Your Transaction ID is **1000455734**.

A link to activate your account has been emailed to **demo@gmail.com** and a OTP PIN has been sent to +91- **9999999999**.

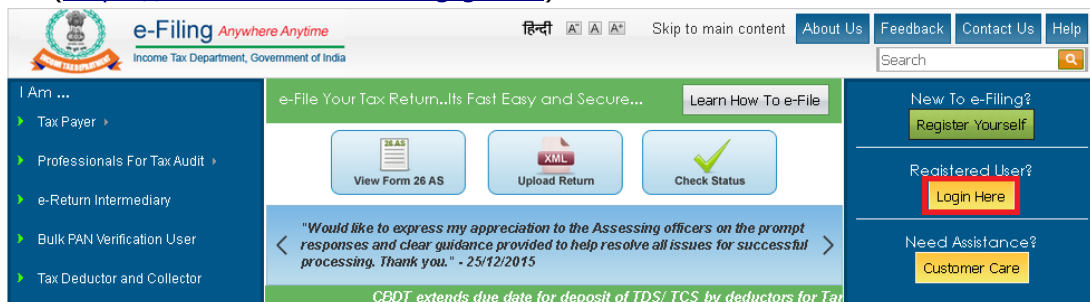
To activate your e-Filing account Please click on activation link and enter the OTP PIN received in your mobile number.

To Login to the e-Filing, you must activate your account. In case of any queries, please contact 1800-4250-0025.

- In order to activate the account, the user should click on the Activation link and enter the Mobile PIN. On success, the user account is activated.


Updating process for Existing TAN Users in e-Filing

- Type the URL of e-Filing application in a browser.
(<https://incometaxindiaefiling.gov.in>)



- Click on the '**Login Here**' button and enter User ID (TAN), Password and Captcha. Click Continue.

Login

User ID *	<input type="text"/>
Password *	<input type="password"/>
<input type="button" value="Login"/> Forgot Password?	
New Users? Register Now Resend Activation Link	
 e-Filing Login Through NetBanking	

- TAN User can update the Authorized Person Details and Organization Details.

Note: User may skip this update till 31st July 2016.

Update TDS Details

User ID /TAN :	<input type="text" value="AAAA00001K"/>
Authorized person Details	
PAN	<input type="text" value="AAAPA0001A"/>
Name	<input type="text" value="RAJIV"/>
Aadhaar Number	<input type="text"/>
Organization Details	
Organization Name	<input type="text" value="Dell computer"/>
Date of TAN Allotment (DD/MM/YYYY)	<input type="text" value="12/07/2013"/>
PAN of the Organization *	<input type="text" value="AAAPA0001A"/>
Organization Name(As in PAN) *	<input type="text" value="PREETHY"/>
Reasons if PAN not Available	<input type="text" value="Select"/>
AIN /BIN	<input type="text"/>
<input type="button" value="Update"/> <input type="button" value="Skip"/>	

- Click "**Update**".
- Success message is displayed on the screen.

Tax Deductor and Collector User Registration and Services

Update TDS Details

Thank you for updating Registration Details with e-Filing . Your request for Updation of Registration Details has been sent to the **AAAPAD0000A** for approval.

Kindly contact PAN of Organization to approve your request.

[Continue To Login](#)

- Click "**Continue To Login**". User is redirected to e-Filing Dashboard.

Note:

- If Organization PAN is present:
 - ❖ The request for Update Approval would be forwarded to Organization PAN's Worklist.
 - ❖ Organization PAN User have to login to e-Filing with PAN of the Organization.
 - ❖ Navigate to **Worklist → For Your Action**.
 - ❖ The Organization PAN User either can approve or reject the update request.
 - ❖ The update Status will be shared to the Authorized Person's e-mail id.
 - ❖ If Organization PAN User rejects the request, the TAN User can re-update in e-Filing.
- If Organization PAN is not present:
 - ❖ The TAN User has to upload TAN allotment letter and Letterhead authorizing DDO for this purpose.

Update TDS Details

User ID /TAN :	AAAAA00000A
Authorized person Details	
PAN	AAAPAD0001A
Name	RAJIV
Aadhaar Number	
Organization Details	
Organization Name	Dell computer
Date of TAN Allotment (DD/MM/YYYY)	12/07/2013
PAN of the Organization	
Organization Name(As in PAN)	
Reasons if PAN not Available *	Exempt Organization
AIN /BIN	
Please select the files to upload *	<input checked="" type="checkbox"/> TAN allotment letter . <input checked="" type="checkbox"/> Letterhead authorizing DDO for this purpose. (PAN card copy of Authorized person OR Passport copy of Authorized person)
Attachment in PDF Format *	Browse... No file selected.
Update Skip	

Tax Deductor and Collector User Registration and Services

- Success message is displayed on the screen.

[Update TDS Details](#)

Your registration details are updated successfully.

Continue To Login

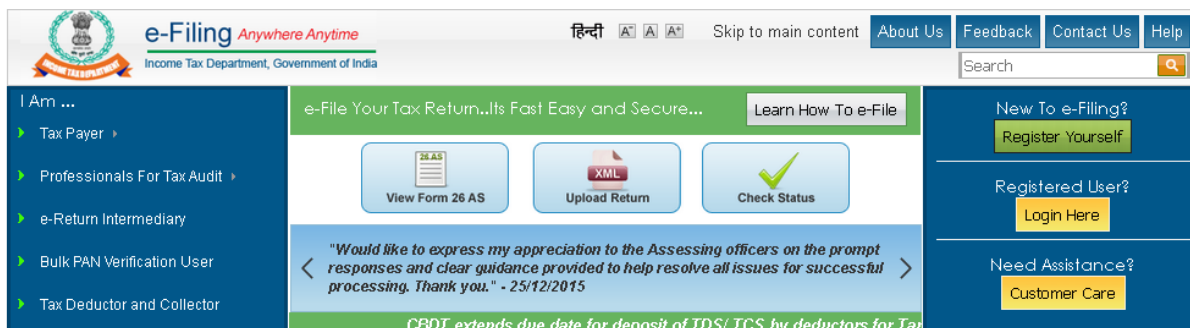
- Click "**Continue To Login**". User is redirected to e-Filing Dashboard.

Tax Deductor and Collector User Registration and Services

Tax Deductor and Collector User Features

Login

- In browser, enter the URL of the e-Filing application (<https://incometaxindiaefiling.gov.in>).



- Click '**Login Here**' button. Enter User ID, password and click on "**Login**" button.

Login

User ID *

Password *

Login

Forgot Password?

New Users? Register Now | Resend Activation Link

NET Banking

e-Filing Login Through NetBanking

- If the user's email ID and Mobile Number are not verified in e-Filing system then the user is requested to update a valid Mobile number and E-mail ID or confirm the Mobile number and Email ID already registered is their profile. (Department would share all critical communications only to the mobile number and Email ID registered in e-Filing portal.)
- The user can edit his details and click on the "**Continue**" button.

Tax Deductor and Collector User Registration and Services

Verify and Confirm Contact Details

Step 1: Verify Details

Step 2: Validate PINs

User ID *	XXXX00000X
Primary Contact Details	
Mobile Number *	9999999999
Email ID *	demo@gmail.com
Secondary Contact Details	
Contact belongs to	Self
Mobile Number	
Email ID	
<input type="checkbox"/> Send SMS, Emails, Alerts and Notifications to Secondary Contact (Except PIN)	
<div>Continue</div>	

- User has to confirm the Contact details and Click on Continue button.
- A mobile PIN and email PIN will be sent to the primary mobile number and primary Email ID respectively.

Tax Deductor and Collector User Registration and Services

Confirm Contact Details

Step 1: Verify Details

Step 2: Validate PINs

User ID *	XXXX00000X
Primary Contact Details	
Mobile Number	9999999999
Email ID	demo@gmail.com
Secondary Contact Details	
Mobile Number	
Email ID	
Contact belongs to	Self
<div>Back</div> <div>Continue</div>	


- Enter Mobile PIN and Email PIN in respective fields and click Continue button
- If the PINs are not received within specified time (say 2 minutes), the taxpayer may opt for "Resend PINs" option. The PINs once received will be valid for 24 hours.

Validate PIN Details

Step 1: Verify Details

Step 2: Validate PINs

User ID *	XXXX00000X
Contact Details	
PINs are sent to below mentioned Contact details	
Mobile Number	9999999999
Email ID	demo@gmail.com
PINs	
Mobile PIN *	Enter Mobile PIN
Email PIN *	Enter Email PIN
<div>Back</div> <div>Resend PINs</div> <div>Continue</div>	

 Please check for email from Department for PIN in your Inbox as well as the Spam or Junk folder (mail id - **DONOTREPLY@incometaxindiaefiling.gov.in**)

Tax Deductor and Collector User Registration and Services

- On Successful Validation. Success message is displayed on the screen. The user can click on "Continue to Login" button wherein the user will be taken to the Dashboard.

Validate Contact Success

Step 1: Verify Details

Step 2: Validate PINs

Thank you for validating your contact details with e-Filing. Your Contact details are updated successfully.

The contact details will be used for all future communications including reset of password.

[Continue To Login](#)

Dashboard

[View Returns / Forms](#)

[My Pending Actions](#)

IMPORTANT !!!

Please make sure you have the correct Email ID and Mobile Number against your profile. These details are important and will be used for all communications.

To update the details, please go to the menu "Profile Settings/My Profile"

Profile Settings

My Profile

In order to view or update 'My Profile', the user needs to perform the following steps

Step 1: Go to the 'Profile settings' and Click on the 'My Profile' link.

Step 2: A screen with TAN/PAN details, Principal Contact details, Address and Contact Details will be displayed.

[My Profile](#)

TAN/PAN Details	Principal Contact	Address	Contact Details
-----------------	-------------------	---------	-----------------

TAN Details	
TAN	XXXX00000X
Organization Name	TEMENOS INDIA PVT LTD.
PAN Details	
PAN	PANNOAVBL
Organization Name	NOT AVAILABLE

Step 3: In order to change the Principal Contact details Click on 'Principal Contact' tab and click on the 'Edit' button.

[My Profile](#)

TAN/PAN Details	Principal Contact	Address	Contact Details
-----------------	-------------------	---------	-----------------

PAN	
PAN	XXXXPXXXXX
Surname *	
Surname	SURESH
Middle Name	
Middle Name	
First Name	
First Name	
Designation *	
Designation	System Officer
Date of Birth(DD/MM/YYYY)	
Date of Birth	30/08/1990

Edit

- Update the required fields and click on 'Save' button. A success message is displayed as shown.

Tax Deductor and Collector User Registration and Services

[My Profile](#)

TAN/PAN Details

Principal Contact

Address

Contact Details

✓ Principal Contact Details updated successfully. Please update your Digital Signature Certificate.

Edit

PAN	XXXPX0000X
Surname *	SURESH
Middle Name	
First Name	
Designation *	System Officer
Date of Birth(DD/MM/YYYY)	30/08/1990

Step 4: In order to change the address details Click on 'Address' tab and click on the 'Edit' button.

[My Profile](#)

TAN/PAN Details

Principal Contact

Address

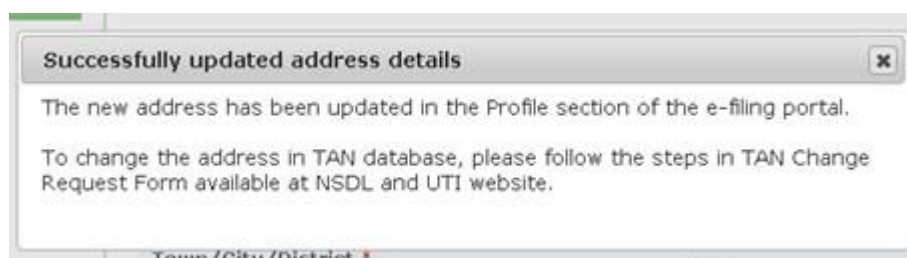
Contact Details

Edit

Flat/Door/Building *	123
Road/Street	
Area/Locality *	R.K.Puram
Town/City/District *	Karur
Pincode *	686868
State *	TAMILNADU
Country *	

- Update the required fields and click on 'Save' button. A success message is displayed as shown.

Tax Deductor and Collector User Registration and Services



Step 5: In order to change the Contact details Click on 'Contact Details' tab and click on 'Edit' button.

[My Profile](#)

TAN/PAN Details

Principal Contact

Address

Contact Details

Save

Cancel

STEP 1: Enter the current contact details

PRIMARY CONTACT	
Mobile Number *	9999999999
Email ID *	demo@gmail.com

SECONDARY CONTACT	
Contact belongs to	Self
Mobile Number	8888888888
Email ID	test@gmail.com

☐ Send SMS, Emails, Alerts and Notifications to Secondary Contact (Except PIN)

IMPORTANT!!!

Please make sure you provide the correct Contact details -Mobile Number and Email ID

1. The Contacts will be used for all future communications including reset of password.
2. Same Mobile Number and Email ID can be used for a maximum of 10 assesseees, as their Primary Contact details.
3. Primary contact details are mandatory and Secondary contact details are optional.
4. Primary and Secondary contact details should not be same
5. An OTP PIN will be sent to each of the Primary Contacts. You should use both the PINs to confirm/authenticate the contacts. OTP PINs are valid for this session only.

- The user can edit the details and click on the 'Save' button.
- Once the Contact details are changed, the user must enter the Mobile PIN and the Email PIN which will be sent to the Mobile number and Email ID mentioned by the user respectively.

Tax Deductor and Collector User Registration and Services

[My Profile](#)

TAN/PAN Details

Principal Contact

Address

Contact Details

- Please verify the details entered in Step-1. Click on continue button to proceed.
- Click on back button to change the details.

STEP 2: Verify the details

PRIMARY CONTACT	
Mobile Number *	9999999999
Email ID *	demo@gmail.com
SECONDARY CONTACT	
Contact belongs to	Self
Mobile Number	8888888888
Email ID	test@gmail.com
<div>BackContinue</div>	

[My Profile](#)

TAN/PAN Details

Principal Contact

Address

Contact Details

- Please enter the PINs received in the Primary Mobile Number and Primary Email ID in the respective fields and click on confirm button.
- Upon successful validation of PINs, the contact details will be authenticated and updated.

STEP 3: Enter the PINs

Mobile PIN *	<input type="text" value="Enter Mobile PIN"/>
Email PIN *	<input type="text" value="Enter Email PIN"/>
<div>ConfirmCancel</div>	

- Enter the Mobile PIN and Email PIN. Click on confirm. A success message will be displayed as follows

Tax Deductor and Collector User Registration and Services

My Profile

TAN/PAN Details

Principal Contact

Address

Contact Details

✓ Your Contact details are updated successfully.

Edit

PRIMARY CONTACT	
Mobile Number *	9999999999
Email ID *	demo@gmail.com

SECONDARY CONTACT	
Contact belongs to	Self
Mobile Number	8888888888
Email ID	test@gmail.com

☐ Send SMS, Emails, Alerts and Notifications to Secondary Contact (Except PIN)

Change Password

In order to change the password, the user needs to perform the following steps

Step 1: Go to the 'Profile settings' and Click on the 'Change Password' link.

Change Password

Old Password *	<input type="password"/>	
New Password *	<input type="password"/>	Zero Length ■■■■■■■■
Confirm Password *	<input type="password"/>	
<div>SubmitCancel</div>		

Step 2: The User needs to enter the mandatory details (*) then Click on the 'Submit' button and the fields are validated for correctness.

Once the password is changed successfully, a success message will be displayed on the screen

Success

✓ Your password has been updated successfully and the Transaction ID is: 1000447992. In case of any queries, please contact 1800 4250 0025.

Change Secret Question(s) / Answer(s)

In order to change the secret question / answer, the user needs to perform the following steps:

Step 1: Go to 'Profile settings' and Click on the 'Change Secret Question(s)/Answer(s)' link.

Change Secret Question(s) / Answer(s)

Primary Secret Question *	<input type="text" value="Select"/>
Primary Secret Answer *	<input type="text"/>
Secondary Secret Question *	<input type="text" value="Select"/>
Secondary Secret Answer *	<input type="text"/>
<input type="button" value="Submit"/> <input type="button" value="Cancel"/>	

Step 2: User needs to enter all the mandatory fields like the Primary and Secondary questions and their respective answers.

Step 3: Click on the 'Submit' button.

The fields are validated for correctness and a Success Message is displayed on the Screen.

Success

✔ Your secret question/answer (s) have been updated successfully and the Transaction ID is: 1000447998. In case of any queries, please contact 1800 4250 0025.

Register Digital Signature Certificate

In order to register the Digital Signature Certificate, the user needs to perform the following steps:

Step 1: Go to 'Profile Settings' and Click on the 'Register Digital Signature Certificate' link.

Step 2: The User needs to download the DSC Management Utility and Register his/her DSC and generate the Signature file.


Step 3: Upload the generated Signature file.

Step 4: Click on the 'Submit' button.

Tax Deductor and Collector User Registration and Services

Register Digital Signature Certificate

[Click here to download the DSC Utility](#) ?

 **Steps to Generate Signature File :**

- ◆ Download the "ITD e-Filing DSC Management Utility".
- ◆ Generate the signature file. Follow the instructions in the Utility.
- ◆ Attach the generated signature file.

Note: The generated signature file is valid only for one transaction.

Attach the Signature file *

No file selected.

Step 4: A Success message will be displayed on the screen as shown below.

Success



• Your Digital Signature Certificate is successfully updated and the Transaction ID is: 1000077623. In case of any queries, please contact 1800 4250 0025.

E-filing Vault - Higher Security

Restricting the methods/options for Login and locking the reset password options will secure account from possible misuse. This is for additional security or secured access.

Step 1: Navigate to Profile Settings → E-Filing Vault-Higher Security. The

User can either enable or disable the higher security as he/she wishes.

E-filing Vault - Higher Security

Login with Higher Security Options

If you choose any option (s) below, then in addition to or instead of your userid and password, you will be required to use that option to login or provide the additional validation. This will provide additional security to your e-filing account.

<input type="checkbox"/>	Login through net-banking
<input type="checkbox"/>	Login using DSC
<input type="checkbox"/>	Login using Aadhaar OTP

Lock Reset Password Options

If you choose any option (s) below, if you forget your password, then, you will be required to use that option to reset your password. The existing options of E-filing OTP and Secret Question will be disabled. This will provide additional security to your e-filing account.

<input checked="" type="checkbox"/>	You can always login through net-banking and reset your password (default)
<input type="checkbox"/>	Using DSC
<input type="checkbox"/>	Using Aadhaar OTP

Tax Deductor and Collector User Registration and Services

Step 2: User can select the required options to secure the account. On Success, user will be allowed to login and Reset Password only with the above selected option(s).

Note: To know more on E-Filing Vault Higher Security, refer E-Filing Vault Higher Security User Manual under Help Menu.

e-File

Prepare and Submit Online Form (Other than ITR)

- Navigate to e-File → Prepare and Submit Online Form (Other than ITR)
- Select Form Name from the drop down.

Prepare and Submit Form Online(Other than ITR)

TAN	PERT12345A
Form Name *	15CA
Select the type of Digital Signature Certificate *	
<input type="radio"/> Upload using .pfx file	
<input type="radio"/> Upload using USB token	
<div>Continue</div> <div>Cancel</div>	

Prepare and Submit Form Online(Other than ITR)

TAN	XXXX00000X
Form Name *	Select
Assessment Year *	Select
Select the type of Digital Signature Certificate *	
<input type="radio"/> Upload using .pfx file	
<input type="radio"/> Upload using USB token	
<div>Continue</div> <div>Cancel</div>	

- For a TAN user, only Form 15CA is available.

Submit Form 15G/Form 15H (Consolidated)

- Navigate to e-File --> Submit Form 15G/Form 15H (Consolidated)

Tax Deductor and Collector User Registration and Services

[Submit Form 15G/Form 15H \(Consolidated\)](#)

Step 1: Enter Statement Details

Step 2: Upload File

Step 3: Upload Successful

Statement Details

TAN	XXXT12345A
Form Name *	Select
Financial Year *	Select
Quarter *	Select
Filing Type *	Select
<input type="button" value="Validate"/>	

- Select the Form Name either Form 15G or Form 15H, Financial Year, Quarter and the Filing Type. Click Validate.
- Once the details are validated, the following screen is displayed.


[Submit Form 15G/Form 15H \(Consolidated\)](#)

Step 1: Enter Statement Details

Step 2: Upload File

Step 3: Upload Successful

Submit Form 15GH/ Form 15H

TAN	PERT12345A
Financial Year	2015
Form Name	FORM15G (Consolidated)
Quarter	Q2
Upload Type	0
Attach the Form 15G/Form 15H (Consolidated) (.zip) File *	<input type="button" value="Browse..."/> No file selected.
<input type="button" value="Click here to download the DSC Utility"/> ?	
<div> Steps to Digitally Sign the Form:<ul style="list-style-type: none">◆ Download the "ITD e-Filing DSC Management Utility".◆ Generate the signature file. Follow the instructions in the Utility.◆ Attach the generated signature file.</div>	
Attach the Signature file *	<input type="button" value="Browse..."/> No file selected.
<input type="button" value="Upload"/>	

- Browse and attach the ZIP file and Signature file.
- ZIP file and Signature file can be generated from the DSC Management Utility.
- Download the DSC Management Utility from the button provided.

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- Click Upload. On successful upload, the success message is displayed on the screen.

Submit Successful

Step 1: Enter Statement Details

Step 2: Upload File

Step 3: Upload Successful

FORM15H (Consolidated) has been filed and the Transaction ID is: **1010098524** In case of any queries, please contact 1800 4250 0025.

An e-mail confirming the successful submission of your Form along with the Receipt number has been sent to **demo@gmail.com**

Kindly login after 24 hours to check the status of the uploaded form, (GO TO 'My Account' -> 'View Form 15G/15H (Consolidated) ').

Upload Form 15CA (Bulk)

- Navigate to e-File -> Upload Form 15CA(Bulk) to upload the form 15CA.

Upload Form15CA(Bulk)


Form Name *


FORM 15CA


Attach the ZIP file *

Browse...

No file selected.

 Click here to download the DSC Utility



 **Steps to Digitally Sign ITR:**

- ♦ Download the "ITD e-Filing DSC Management Utility".
- ♦ Generate the signature file. Follow the instructions in the Utility.
- ♦ Attach the generated signature file.

Note: The generated signature file is valid only for one transaction.

Attach the Signature file *

Browse...

No file selected.

Submit

Cancel

- Attach the ZIP file to upload Form 15CA.
- Attach the Signature File generated using DSC Management Utility.
- Click **"Submit"**.
- Success message is displayed on the screen.

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Upload Form 15CA(Bulk) Success



Your Bulk FORM 15CA is uploaded successfully and the Transaction ID is: 1010110851 . In case of any queries, please contact 1800 4250 0025.

An e-mail confirming the successful upload of your e-filing has been sent to demo@gmail.com

Kindly login after <24 hours> to check the status of your e-Filing using the token number 110000622 , (GO TO 'My Account' -> 'e-Filed 15CA Token details').

My Account

e-Filed Returns/Form

- Navigate to My Account -> e-Filed Returns/Form
- User will be able to see the status of Returns/Forms.

e-Filed Returns/Forms

PAN	A.Y.	ITR/Form	Filing Date	Filing Type	Filed By	Ack. No.	Status
TANS12345A	2016-17	Form 15CB	29/04/2016	Original	ARCA123456	100258751290416	Successfully e-Filed
TANS12345A	2016-17	Form 15CB	28/04/2016	Original	ARCA123456	100258441280416	Successfully e-Filed

- Click on the Acknowledgment number. The Details of the acknowledgment number is displayed as a pop up.
- User can download PDF, ITR-V for ITRs, XMLs and Receipts.

Details Of Acknowledgement Number - 100258751290416

TAN	TANS12345A	ITR/Form	Form 15CB	Assessment Year	2017
Filing Type	Original	Acknowledgement Number	100258751290416		

Date	Activity / Status	Downloads / Status Description
29/04/2016	Successfully e-Filed	XML ITR/Form Receipt



Note :

ITR/Form and ITR-V/Acknowledgment are password protected. To open the PDF, please enter your TAN in lower case For example, if your TAN is **ABCD12345A** then the password will be **abcd12345a**.

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Add CA

- Navigate to My Account -> Add CA
- Enter the Membership no, select the form name.

Add CA

Membership Number *	<input type="text"/>
Name of the CA *	<input type="text"/>
Form Name *	15CB
<input type="button" value="Submit"/> <input type="button" value="Cancel"/>	

- Click submit. Success message should be displayed on the screen.

Success

✓ CA has been added successfully to your profile. Transaction ID: 1000448174. In case of any queries, please contact 1800 4250 0025.

List/Disengage CA

- Navigate to My Account -> List/Disengage CA
- Advanced Search criteria is available to view the List/Disengage CA

List/Dis-engage CA

TAN	<input type="text" value="TANS12345A"/>					
Form Name	<input type="text" value="Select"/>					
Status	<input type="text" value="Select"/>					
<input type="button" value="Search"/>						
CA Name	CA Membership number	Form Name	Assessment Year	Activation Date	Status	Select
RAHUL	143143	Form 15CB	2016-17	01/04/2016	Active	<input checked="" type="checkbox"/>
HARI	111113	Form 15CB	2016-17	01/04/2016	Active	<input type="checkbox"/>
<input type="button" value="Dis-engage"/>						

- Click the 'select' check box in any row and click on "**Disengage**". CA should be disengaged for the particular Form.

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View Filed Form 15G/Form 15H (Consolidated)

- Navigate to My Account -> View Filed Form 15G/Form 15H (Consolidated) to view the form 15G/Form 15H upload by the assessee.
- Select the Financial Year, Form Name, Quarter and click "**View Details**".

View Filed Form 15G/Form 15H (Consolidated)

TAN	<input type="text" value="TANS12345A"/>
Financial Year *	<input type="text" value="Select"/>
Form Name *	<input type="text" value="Select"/>
Quarter *	<input type="text" value="Select"/>
<input type="button" value="View Details"/>	

View Filed Form 15G/Form 15H (Consolidated)

TAN	TANS12345A	Financial Year	2015	Form Name	FORM15G	Quarter	Q3
S.No	Transaction No	Filed On	Filing Type	Status			
1	1000500774	07/04/2016	O	Rejected			
2	1000488272	17/03/2016	O	Accepted			

- Click on the Transaction No. against the record for which the details has to be viewed. In case of rejection, the rejected reason is provided.

Details Of Transaction Number - 1000500774

TAN	Financial Year	Form Name	Quarter
TANS12345A	2015	FORM15G	Q3

Error Details

Status	Error Description
Rejected	TAN in the UIN does not match with the TAN entered at the time of upload.

- If accepted, the rejected reason is provided. The details of acknowledgment number is displayed as a pop up. User can download ZIP file and Receipt.

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Details Of Transaction Number - 1000488344

TAN	Financial Year	Form Name	Quarter
TANS12345A	2015	FORM15H	Q1

Statement Details

Status	Acknowledgement Number	Attachments
Accepted	100230481170316	ZIP
		Receipt

Manage ITDREIN

- Navigate to My Account -> Manage ITDREIN
- To generate new ITDREIN click on the button "Generate New ITDREIN".

Manage ITDREIN

S.No.	ITDREIN	Form Name	Reporting Entity Category	CreatedDate
No ITDREINs found				

Generate New ITDREIN

- A Pop up with Form Type and Reporting Entity Category is displayed. Select the Form Type and Reporting Entity Category from the dropdown.

Form Type*

Select

Reporting Entity Category*

Select

Generate ITDREIN

Cancel

- Step 5 – Based on the Form Type and Reporting Entity Category selected, the ITDREIN will be generated and the user will be able to upload and view the corresponding Form.
- Click Generate ITDREIN button
- Success Message is displayed as shown below. User receives a confirmation e-mail on successful generation of ITDREIN to the registered Email ID. An SMS is also sent to the registered Mobile number.

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- On Successful Generation of ITDREIN, the screen is displayed as shown.

[Manage ITDREIN](#)

S.No.	ITDREIN	Form Name	Reporting Entity Category	CreatedDate
1	PERAA8001A.AB224	Form 61	Banking company	10/03/2016

[Generate New ITDREIN](#)

Steps to Add Authorised Person

- Go to My Account → Manage ITDREIN.
- To add Authorised Person for the generated ITDREIN, click on the link provided in the ITDREIN Column.

[Manage ITDREIN](#)

S.No.	ITDREIN	Form Name	Reporting Entity Category	CreatedDate
1	PERAA8001A.AB224	Form 61	Banking company	10/03/2016

[Generate New ITDREIN](#)

- Click on the button Add Authorised Person.

[Manage ITDREIN](#)

S.No.	Authorised Person Type	PAN	Name	Designation	Access Type	Created date	Date of De-Activation	Status
No Authorised person found for the ITDREIN								

[Back](#)

[Add Authorised Person](#)

- A Pop up with Authorised Person details appears as shown below.

Tax Deductor and Collector User Registration and Services

Authorised Person Type *	Select
PAN *	
Person Name *	
Designation *	
Access Type *	Upload and View
Date of Birth (DD/MM/YYYY) *	
Mobile No. *	+91
Email ID *	
Flat/Door/Building *	
Road/Street	
Area/Locality *	
Town/City/District *	
Pincode *	
State *	Select
Country *	Select
<div>Add Authorised Person</div> <div>Cancel</div>	

- Enter all the details and Click on Add Authorised Person button. Success Message is displayed as shown below

✔ Authorised Person Added Successfully

OK

Manage ITDREIN

S.No.	Authorised Person Type	PAN	Name	Designation	Access Type	Created date	Date of De-Activation	Status	
1	Designated Director	XXXPX3305X	SWAMY AAA RAM	DR	Upload and View	18/03/2016	-	Pending Activation	Resend Activation Link

Back

Add Authorised Person

View Form 15CA

- Navigate to My Account -> View Form 15CA to view the form 15CA upload by the assessee.
- The user can view the details like Remittee PAN, Country to which remittance is made, Date of Filing, Ack. No etc. and can download the PDF of the form filed.

Tax Deductor and Collector User Registration and Services

[View Form 15CA](#)

PAN of Remittee	<input type="text"/>
Country to which remittance is made	Select
Date Of Filing (DD/MM/YYYY)	<input type="text"/>
Acknowledgement Number	<input type="text"/>
<input type="button" value="Search"/>	

A.Y.	Remittee PAN	Remittee Name	Filed On	Type	Ack. No.	Status
2015-16	PANNOAVBL	PRIYA	30/12/2014	Original	100069341301214	Successfully e-Filed
2015-16	PANNOAVBL	GOUTHAM	23/12/2014	Original	100067021231214	Successfully e-Filed

- Click on the Acknowledgment number. The details of acknowledgment number is displayed as a pop up. User can download PDF, ITR/Form and Receipts.

Details Of Acknowledgement Number - 100069341301214

TAN	MUMV02513G	ITR/Form	Form 15CA	Assessment Year	2015
Filing Type	Original	Acknowledgement Number	100069341301214		

Date	Activity / Status	Downloads / Status Description
30/12/2014	Successfully e-Filed	ITR/Form Receipt

Note :
ITR/Form and ITR-V/Acknowledgment are password protected. To open the PDF, please enter your TAN in lower case For example, if your TAN is **ABCD12345A** then the password will be **abcd12345a**.

e-Filed 15CA Token Details

- Navigate to My Account -> e-Filed 15CA Token Details to view the Bulk Form 15CA uploaded by the assessee.
- Enter the Token Number and click "Submit".

[e-Filed 15CA Token Details](#)

Bulk ITR Status: Date : 29/04/2016 ,Token Number : 110002483 and Raised By: TANS12345A				
S.No.	PAN	File Name	Status	Status Description
1	TANS12345A	pC-TAN.xml	P	Processed

- If the Form is not processed, Error description is displayed under Status Description.

Worklist

For Your Information

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- Navigate to Worklist ->For Your Information.
- Assessee will be able to view the approved/rejected forms submitted by CA on behalf him/her.

For Your Information

Form Name	Select ▼				
<input type="button" value="Search"/>					
Uploaded forms details					
Sl.No	CA Name	Form Name	A.Y.	Submitted On	Approval Status
1	RAHUL	Form 15CB	2016-17	29/04/2016	Successfully e-Filed View Form

- Click on "View Form".

Uploaded form details

Approval Work List ID	1000009326
Form Name	Form 15CB
Form uploaded By	RAHUL
Approval Status	Successfully e-Filed
Name of Remitee	KARTHIK
Country to which remittance is made	SRILANKA
Acknowledge Number	100258751290416
Form 15CB Consumed Status	Consumed
Click here to view the uploaded Form 15CB	
<input type="button" value="Back"/>	



Note :


Form other than ITR is password protected. To open the PDF, please enter assessee PAN in lower case and date of birth in case of individual tax payers / date of incorporation for non-individual tax payers in DDMMYYYY format without any space between the PAN and date fields. For example, if your PAN is **ABCDE1234A** and date of birth / incorporation is **November 17, 1985** then the password will be **abcde1234a17111985**. The date of birth / incorporation should be same as furnished in the respective FORM.

View Filed Form 15CB

- Navigate to Worklist ->View Filed Form 15CB.

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[View Form 15CB](#)

PAN of Remittee	<input type="text"/>
Country to which remittance is made	<input type="text" value="Select"/>
Date Of Filing (DD/MM/YYYY)	<input type="text"/> 
Acknowledgement Number	<input type="text"/>
<input type="button" value="Search"/>	


A.Y.	Remittee PAN	Remittee Name	Filed On	Type	Ack. No.	Status
2016-17	TANS12345A	KARTHIK	29/04/2016	Original	100258751290416	Consumed

- Click on the Ack. No. The details of acknowledgment number is displayed as a pop up. User can download PDF, ITR/Form and Receipt.

Details Of Acknowledgement Number - 100258751290416

TAN	TANS12345A	ITR/Form	Form 15CB	Assessment Year	2017
Filing Type	Original	Acknowledgement Number	100258751290416		

Date	Activity / Status	Downloads / Status Description
29/04/2016	Successfully e-Filed	XML ITR/Form Receipt

 **Note :**
ITR/Form and ITR-V/Acknowledgment are password protected. To open the PDF, please enter your TAN in lower case For example, if your TAN is **ABCD12345A** then the password will be **abcd12345a**.

TDS

Upload TDS

- Navigate to TDS → Upload TDS.
- User should select FVU Version, Assessment Year, Form Name, Quarter, Upload Type and click "Validate".

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Upload TDS

Step 1: Enter Statement Details

Step 2: Upload File

Step 3: Upload Successful

Statement Details

TAN	TANS12345A
FVU Version *	Select ▼
Assessment Year *	Select ▼
Form Name *	Select ▼
Quarter *	Select ▼
Upload Type *	Select ▼
<input type="button" value="Validate"/>	

Note: Only Regular Statements can be uploaded.

- Upload the ZIP file for which TDS/TCS Statement must be uploaded.
- Upload the Signature file generated using DSC Management Utility for the ZIP file.
- Click **"Upload"**.


Upload TDS

Step 1: Enter Statement Details

Step 2: Upload File

Step 3: Upload Successful

Upload TDS Return

TAN	TANS12345A
FVU Version	FVU 4.9
Assessment Year	201617
Form Name	24Q
Quarter	Q1
Upload Type	R
Upload TDS(.zip) File *	<input type="button" value="Browse..."/> No file selected.
<input type="button" value="Click here to download the DSC Utility"/> ?	
<div><p> Steps to Digitally Sign the Form:</p><ul style="list-style-type: none">◆ Download the "ITD e-Filing DSC Management Utility".◆ Generate the signature file. Follow the instructions in the Utility.◆ Attach the generated signature file.<p>Note: The generated signature file is valid only for one transaction.</p></div>	
Attach the Signature file *	<input type="button" value="Browse..."/> No file selected.
<input type="button" value="Upload"/>	

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- Once the TDS is uploaded, success message will be displayed on the screen. A confirmation mail is sent to the registered email id.

Upload TDS Successful

Step 1: Enter Statement Details

Step 2: Upload File

Step 3: Upload Successful

Your TDS return have been uploaded successfully and the Transaction ID is: **10000090063**. In case of any queries, please contact 1800 4250 0025.

An e-mail confirming the successful upload of your e-filing has been sent to demo@gmail.com

Kindly login after 24 hours to check the status of your Filing using the token number **3111111415**

View Filed TDS

- Navigate to TDS → View Filed TDS.
- User should select Assessment Year, Form Name, Quarter and click "View Details".

View Filed TDS Returns

TAN	<input type="text" value="TANS12345A"/>
Assessment Year *	<input type="text" value="Select"/>
Form Name *	<input type="text" value="Select"/>
Quarter *	<input type="text" value="Select"/>
<input type="button" value="View Details"/>	

- The status of the Filed Form is displayed.

View Filed TDS Returns

TAN	TANS12345A	Assessment Year	201617	Form Name	24Q	Quarter	Q1
S.No	Transaction No	Filed On	Upload Type	Token Number	Status		
1	10000060045	16/03/2016	R	3111111317	Accepted		
<div>Refresh Details</div>							

- Once uploaded the status of the statement shall be "Uploaded". The uploaded file shall be processed and validated. Upon validation the status shall be either be

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"Accepted" or "Rejected" which will reflect within 24 hours from the time of upload.

- In case if "Rejected", the rejection reason shall be available.
- If the status is "Rejected" click on the Token Number to view the error details.

View Filed TDS Returns

TAN	TANS12345A	Assessment Year	201516	Form Name	24Q	Quarter	Q1
S.No	Transaction No	Filed On	Upload Type	Token Number	Status		
1	10000060001	11/03/2016	R	3111111273	Uploaded		
2	10000060000	11/03/2016	R	3111111272	Rejected		
<div>Refresh Details</div>							

Reason for rejection shall be displayed as below:

Details Of Acknowledgement Number - 3111111272				
TAN	Assessment Year	Form Name	Quarter	Status
TANS12345A	201516	24Q	Q1	Rejected
Error Details				
Line Number	Error Code	Error Description		
1	FV-FH-1100031	Invalid File Type		

- If the status is "Accepted", click on the Token Number to see the details of acknowledgement.

Details Of Acknowledgement Number - 3111111317				
TAN	Assessment Year	Form Name	Quarter	Status
TANS12345A	201415	26Q	Q1	Accepted
Statement Details				
S.No	Batch Number	Transaction Type	RRR Number	
1	1	R	770000002850333	

Note: For more details on TDS/TCS Statement Upload, please Refer TDS/TCS Statement Upload User Manual under Help menu.