

TAX2win FAQs

1. What is the next process after filling up the form successfully?

CA from tax2win will call the customer i their mobile number within 1-3 days and file your Income Tax Return.

2. What documents need to be taken from client?

You need to scan and upload the following documents:

- PAN Card (it should be properly visible)
- Form 16 (if client is a salaried person)

3. Does the SM need to keep any documents of the client with himself?

No, the SM doesn't need to keep any documents. As soon as they are scanned and uploaded, Sm can give them back to their clients.

4. What does 'Source of Income' mean on portal?

It means the sources from where the client is earning his/her income. SM should confirm the same from his client and mark **YES/NO** accordingly.

5. Is it necessary to give bank account details?

Yes. To file ITR, client has to give bank account details like Bank Name, IFSC and account number. Uploading the bank statement is not compulsory.

6. How much time does it takes for TDS refund?

Refund will be deposited directly in your bank account within 40-45 days of return filing.

7. What to do, if ITR is not filed even after making the payment?

The amount will be refunded within 7 working Days. SM can mail at service@tax2win.in

8. Where can I get ITR-V?

Either from your registered e-mail id, by calling the support number or sending them a request on service@tax2win.in

Youtube Link:

<https://youtu.be/RQMC5k-xYUY>

9. Can a client file return for 2 consecutive years? This is a new rule passed?

Yes, as of now Valid till 31st May. Filing of belated return and revised return for FY 2019-20 (AY 2020-21), has been extended from 31st March, 2021 to 31st May, 2021.

From the Financial Year 2017-18 onwards if you are submitting Belated Return then, [Fee u/s 234F](#) shall be levied as under

Rs 5,000	If you file after 31st July but till 31st December
Rs 10,000	If you file after 31st December

In case your total income does not exceed Rs 5 lakhs the fee shall be imposed upto Rs 1,000/- only.

10. What does the term "Others" mean under source of income in form fill-up?

Ans : Any income that does not come under the four heads of income (Income from Salary, Income from House Property, Income from Business/Profession, Income from Capital Gain) is taxed under the head Income from other sources. For eg Reality shows like "Kaun Banega crorepati" etc. all these Incomes are taxable that means the person winning 1 Crore in the show will have to pay 30% of tax.

11. Document list in-case of "Others source of Income"?

- Income received from post office account
- Bank details required if Interest is received from savings account
- Reporting of interest received from corporate bonds and tax saving bonds

12. What are the mandatory documents required for tax2win?

SOURCES OF INCOME	REQUIREMENTS
**Mandatory	PAN Card
	Bank Account Details
Salary	Form 16, 16A, 26AS
	Pay slips

	Rent receipt for HRA
	Investment under section 80C, 80D, 80E, 80G
House Property	Address of property
	Home loan interest certificate
	Co-owner's details including their PAN card details & share in capital
Capital Gains	ELSS, SIPs, debt funds, mutual fund statement, purchase and sale of equity funds.
	If there is capital gains through selling shares then stock trading statement is needed
	purchase price, selling price, capital gain details and details of registration, in case a house property is sold
Other Sources	Income received from post office account
	Bank details required if Interest is received from savings account
	Reporting of interest received from corporate bonds and tax saving bonds

13. What happens in case a salaried person does not have Form-16.?

One can file their return without Form-16. They just have to enter their total salary received / taxable salary and TDS deducted on it with the help of their pay-slips and they're good to go.

14. For business which account be considered for filing the return on Tax2win portal?

Business Income Plan.

15. What will happen if a client does not have an email id?

The client can give email id of someone else in the family / friends. Or sahaj mitra can mention his mail id. E-Mail id is basically used to send ITR V once return is filed. So sahaj mitra can give his mail id take print and give back to client.

16. What a SM will do if TAX2WIN does not show on the portal or receives Error message- "Unable to access the Tax2win service from the portal, error shows as 'Mandatory information is not updated, contact to admin'".

Send Email to Sahaj HO: sougata.ghosh@sahaj.co.in. keeping IT in loop.

17. What if commission is not received by the SMs? Instances where commission is not received instantly and some complaints they have not received since last year filing as well.

Currently All SMs are getting upfront commission.

Last year some SMs received wrong commission or did not receive commission.

This has been already escalated to IT team. After reconciliation / billing VLE will receive their actual amount.