

Key Summary of the E-Filing Process

This summary shows you the steps involved to e-file your data.
Whatever you are e-filing, the steps involved are the same.

ITR1, ITR2 , ITR3, ITR4

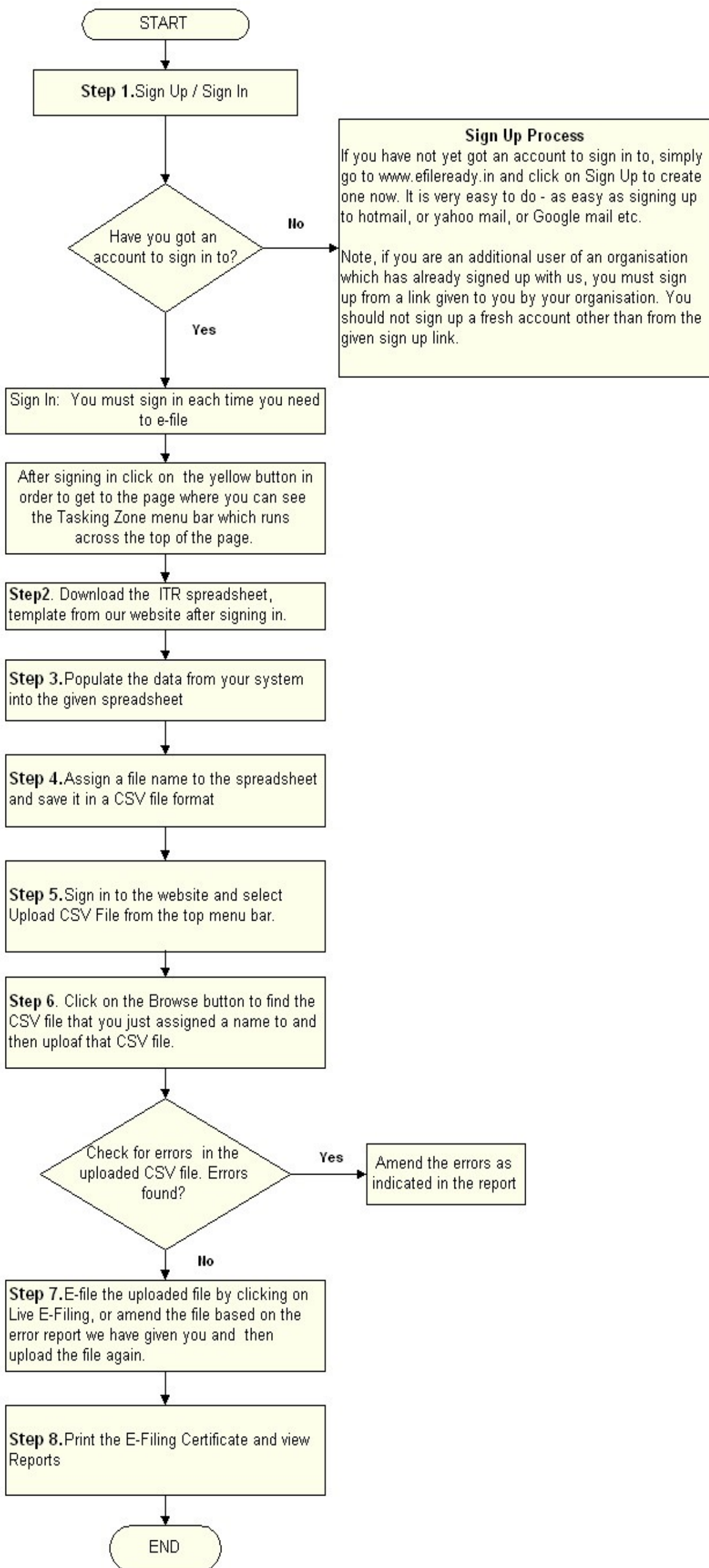
- Step 1** Sign Up / Sign In (more details in separate document).
- Step 2** Download the given spreadsheet template from our website
- Step 3** Populate the data from your system into the given spreadsheet.
- Step 4** Assign a file name to the spreadsheet and save it in a CSV file format.
- Step 5** Sign in to the website and select Upload CSV File from the top menu bar.
- Step 6** Click on the Browse button to find the CSV file that you just assigned a name to, and then upload that CSV file.
- Step 7** E-file the uploaded file by clicking on E-File Now!, or amend the file based on the error report we have given you and then upload the file again.
- Step 8** Print the e-Filed ITR forms and view reports in the language of your choice.

(More information about each of the steps is detailed below.)

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How Does eFileReady.in eFiling Work?



www.eFileReady.in
SPREADSHEET eFILING TO DIT

User Manual

(How does E-filing Work?)



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The following steps explain how you can use www.efileready.in to e-file your returns.

Step 1. Sign Up / Sign In

Sign Up :

If you have not yet got an account to sign in to, simply go to www.efileready.in and click on 'Sign Up' to create one now. It is very easy to do - as easy as signing up to an email account such as hotmail, yahoo mail, or Google mail etc.

Before you start the sign up process, please ensure you have the following details in hand. They will need to be entered to complete the sign up:-

PAN, TAN and TIN numbers.

All employers who are responsible to file the TDS / TCS returns to Department of Income Tax are issued with PAN and TAN numbers. TIN is issued by the Internal Revenue Services. They can be found on any documents or correspondence received from the Income Tax Department.

This sign up process is carried out only once.



Fig 1.1 Home Page – Sign Up

Important Note to Additional Users: if you are an additional user of an organisation which has already signed up with us, you must sign up via a link emailed to you by your organisation's system administrator. You should not sign up for a fresh account from our home page.

How to Appoint Additional Users :

If you are a system administrator and wish to allow other people in your organisation to have access to the e-filing service, please follow the steps detailed below.

In the Tasking Zone menu click on Company, then further click on Additional User details and then click on the 'Add New User' button.

For more details please refer to the eFileReady Sign Up / Sign In manual.

User Name	User Sign In ID	Sign In Log Book	Internet A/C Status <small>!</small>			Forget Sign In Details	System User Personal Details
			Enable	Disable	Confirm		
Khan, Aamir	AB7002654563	View	<input checked="" type="radio"/>	<input type="radio"/>	Confirm	Resend Details	View / Edit
Basu, Bipasha	AB7002342534	View	<input checked="" type="radio"/>	<input type="radio"/>	Confirm	Resend Details	View / Edit
Bachchan, Amitabh	AB7002564313	View	<input type="radio"/>	<input checked="" type="radio"/>	Confirm	Resend Details	View / Edit
Khan, Fardeen	AB7002234754	View	<input checked="" type="radio"/>	<input type="radio"/>	Confirm	Resend Details	View / Edit

Fig 1.2 Add Additional Users

Sign In :

You must sign in each time you need to e-file.

For more details please refer to our separate eFileReady Sign Up / Sign In manual.

The screenshot displays the EfileReady website interface. At the top, a banner reads "Simplest and Cheapest E-Filing solution to DIT". Below this, a man in a suit stands next to a globe, with the URL "www.Efileready.in" and the text "Tested and Gained DIT Recognition for e-filing". A list of services includes: "1. E-filing of ITR Returns as Individual or Groups", "2. E-filing of Individual and HUF", and "3. E-file ITR 1, ITR 2, ITR 3, ITR 4 forms." Below the list, it states "Innovative & Compatible with all Payroll and ERP systems". A section titled "Efileready.in system has been tested to work with the following databases and systems" lists logos for IBM, SAP, ORACLE, JDEdwards, Windows, solaris, and Linux. On the left, a navigation menu contains "Sign Up (To Create New account)", "Sign In (To your account)", and "Features and How it Works". The "Sign In" button is circled in blue. On the right, a text block explains that e-filing can be done with a simple spreadsheet/CSV file, which is converted to the required XML format. At the bottom right, there is a button labeled "To E-File ITR1, ITR2, ITR3, ITR4 Data".

Fig 1.3 Home Page – Sign In

Step 2. Download Spreadsheet

Download the ITR 1 spreadsheet, or any other document spreadsheet as required, to your local system.

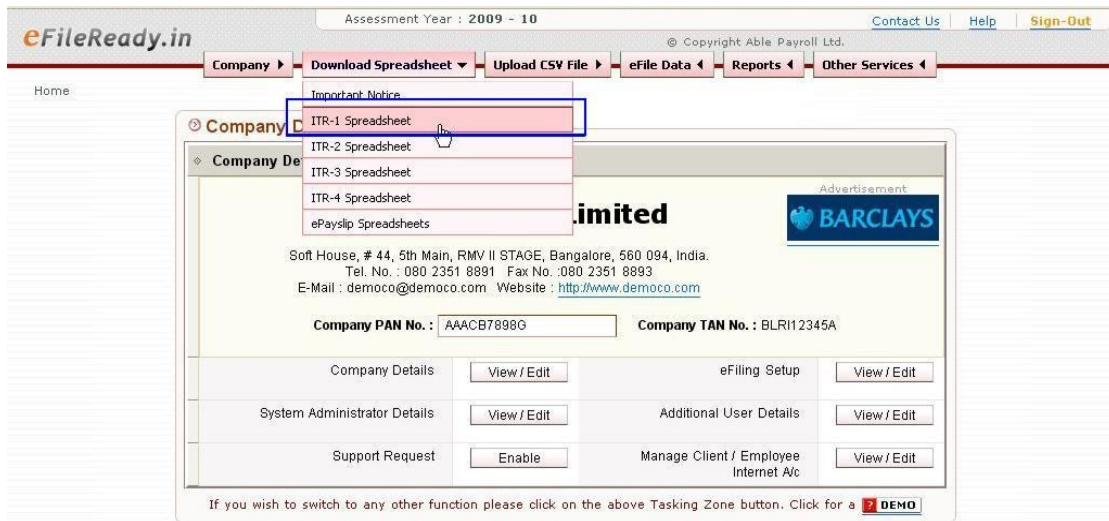


Fig 2.1 Go to Download Spreadsheet in the Tasking Zone, then click on the appropriate sub-menu



Fig 2.2 Click on the required spreadsheet

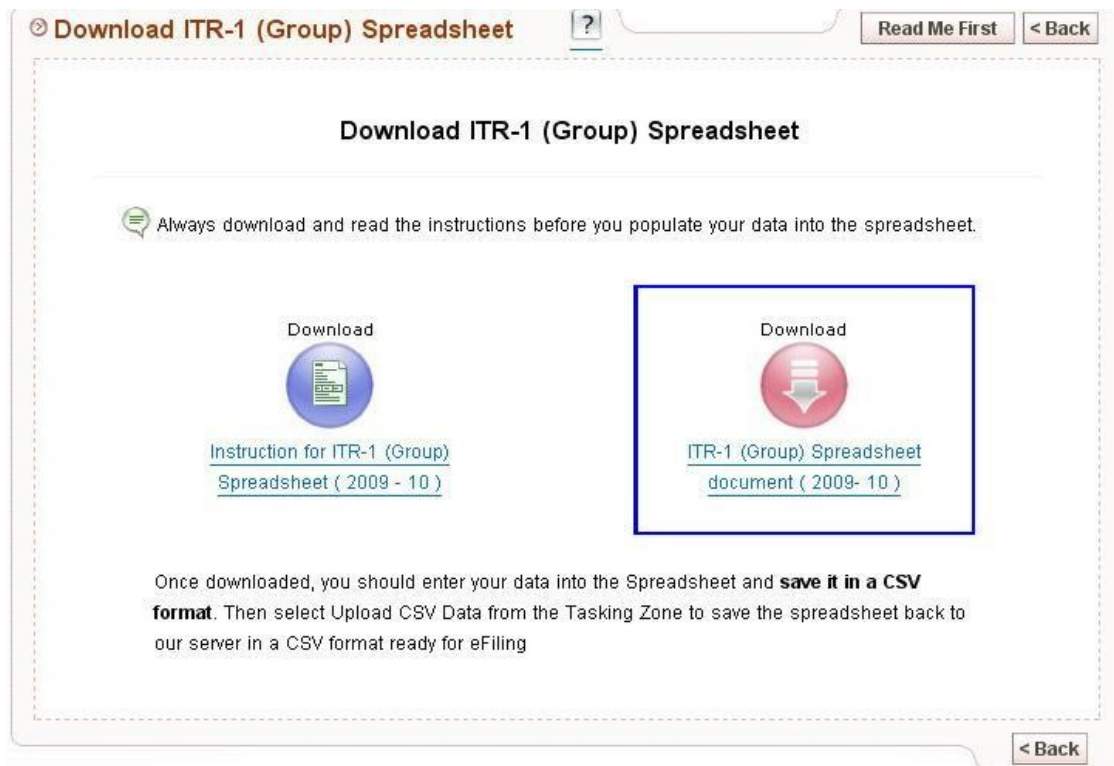


Fig 2.3 Click to download the required spreadsheet

Note: Full instructions for entering your data in the spreadsheet are provided and can be downloaded. We recommend you read these instructions before filling in the actual spreadsheet.

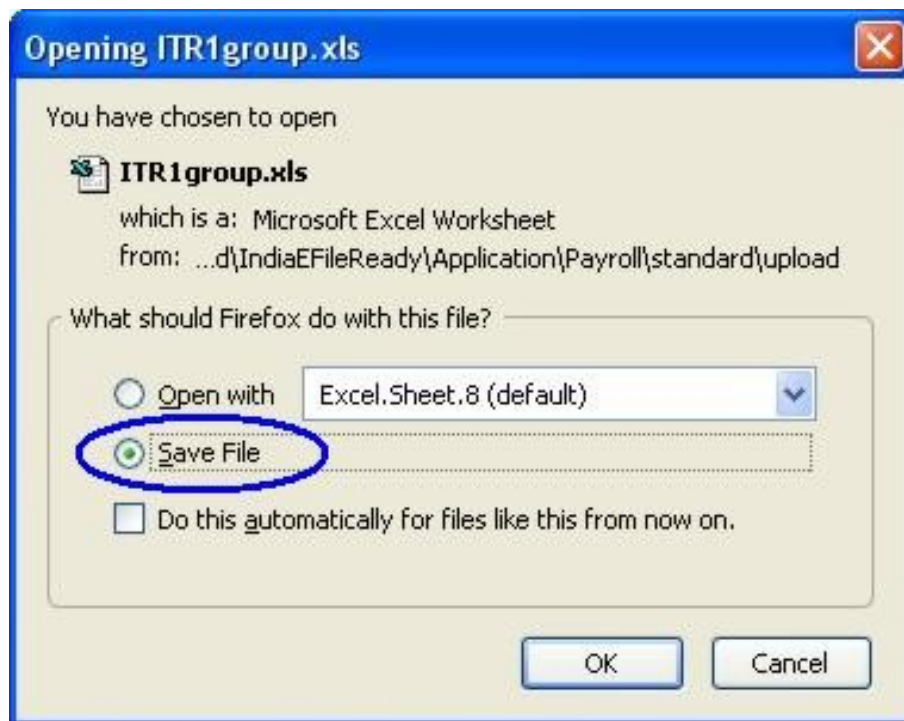


Fig 2.4 Download and Save the spreadsheet to your local system

Step 3. Populate your data into the spreadsheet

Populate the ITR 1 data from your system into the downloaded spreadsheet. Refer to the instructions provided if you are unsure of any field.

1	A	B	C	D	E	F	G	H
	A1	A2	A3	A4	A5	A6	A7	A8
2	Optional Language	Optional Ref	Assessment Year	PAN	First Name	Middle Name	Last Name	Flat/Door/Block No
3	Hindi	Hindi Ref	2009-10	AIKPH1234K	Rajesh	Unni	Krishnan	1
4	Tamil	Reference	2009-10	AILPH1234K	Krishna		Mudaliar	2
5	Hindi	Hindi Ref	2009-10	AIKPH1234K	Kareena		Kapoor	3
6	Hindi	Hindi Ref	2009-10	AIKPH1234K	Latha	Renu	Rajani	4
7			2009-10	AIKPH1234K	Karishma		Bhat	64
8	Hindi	Hindi Ref	2009-10	AIKPH1234K	Ventakesh		Naidu	154
9	Hindi	Hindi Ref	2009-10	AIKPH1233L	Gopal	Ganesh	Hegde	485
10	Hindi	Hindi Ref	2009-10	AIKPH1234K	Chandana	Ganapathi	Bhat	65644
11			2009-10	AIKPH1234K	Mohan		Rangan	1
12	Hindi	Hindi Ref	2009-10	AIKPH1234K	Vinutha		Bhat	2
13	Tamil	Reference	2009-10	AIKPH1234K	Dilip	G	Mishra	3
14	Hindi	Hindi Ref	2009-10	AIKPH1234K	Sawan		Nayak	4
15			2009-10	AIKPH1234K	Sandeep		Nayak	64
16			2009-10	AIKPH1234K	Lara		Dutta	1
17	Tamil		2009-10	AIKPH1234K	Sushmitha		Sen	64
18	Hindi	Hindi Ref	2009-10	AIKPH1234K	Konkona	P	Sen	154
19	Hindi	Hindi Ref	2009-10	AIKPH1234K	Suchitra		Pillai	485
20	Hindi	Hindi Ref	2009-10	AIKPH1234K	Rajesh	Unni	Krishnan	65644
21	Hindi	Hindi Ref	2009-10	AIKPH1234K	Krishna		Mudaliar	2
22			2009-10	AIKPH1234K	Kareena		Dutta	65644
23			2009-10	AIKPH1234K	Latha	Renu	Nayak	2
24			2009-10	AIKPH1234K	Karishma		Devaiah	3
25			2009-10	AIKPH1234K	Ventakesh		Reddy	65644
26	Hindi	Hindi Ref	2009-10	AIKPH1234K	Gopal	Ganesh	Naik	1
27	Tamil	Reference	2009-10	AIKPH1234K	Chandana	Ganapathi	Kannuri	2
28	Hindi	Hindi Ref	2009-10	AIKPH1234K	Mohan		Kini	3
29	Hindi	Hindi Ref	2009-10	AIKPH1234K	Vinutha		Deshpande	4
30				AIKPH1234K				
31								

Sheet1 / Sheet2 / Sheet3 / NUM

Fig 3.1 Populate your data into the downloaded spreadsheet

Now save your data in the spreadsheet in a CSV format.

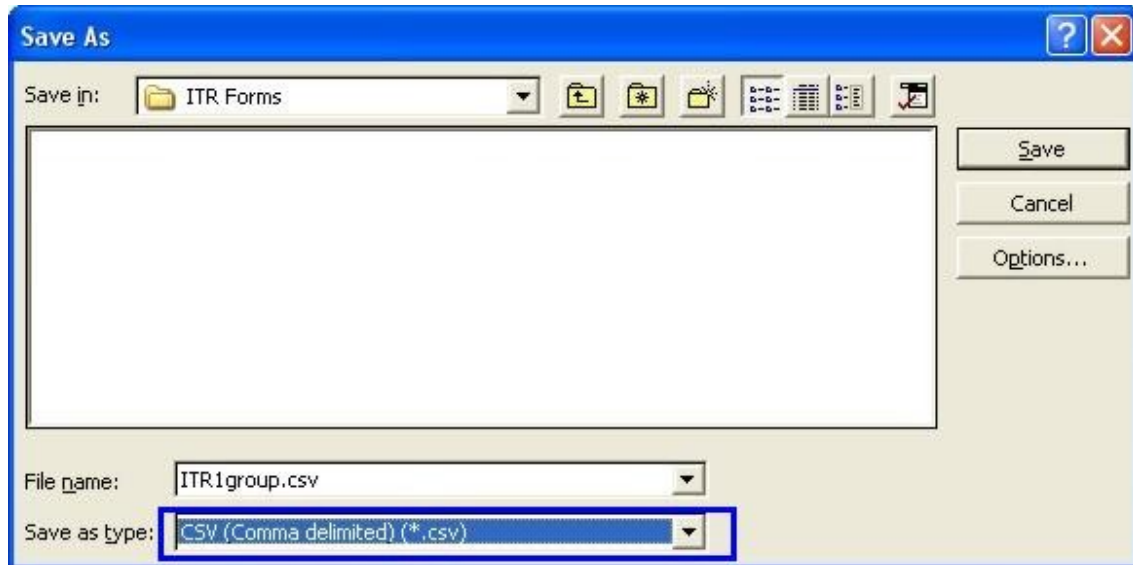


Fig 3.2 Save the spreadsheet as a CSV file

Step 4. Upload your data to eFileReady

Sign in to WWW.EFILEREADY.IN

Select Upload CSV File from the Tasking Zone menu and then further select Upload ITR 1 CSV Files, or any other document CSV file as required.

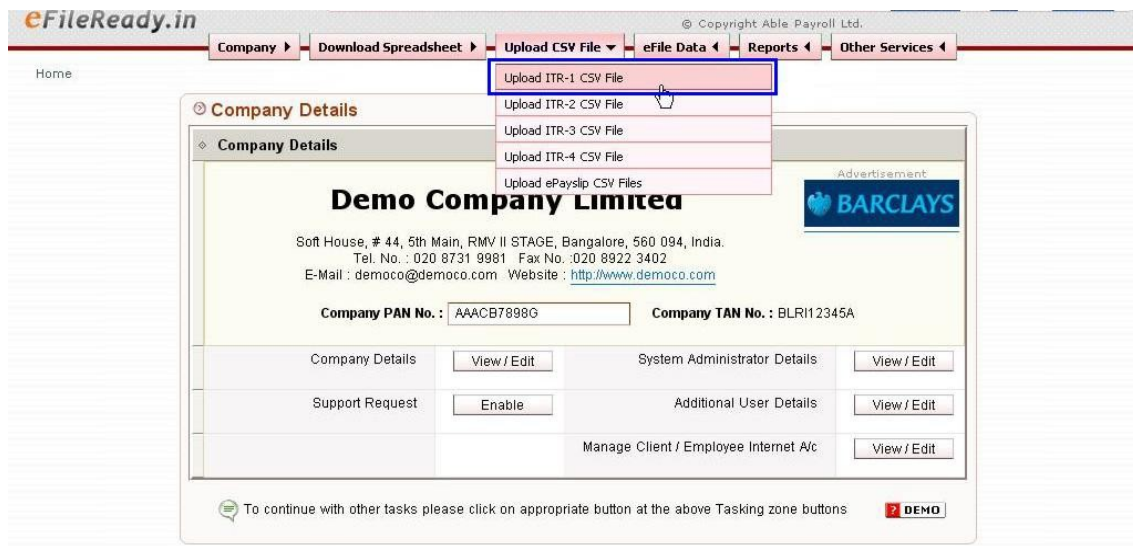


Fig 4.1 Click on the Upload CSV File sub-menu



Fig 4.2 Click on the appropriate Upload CSV File link

Upload ITR-1 (Group) CSV File [?](#) [< Back](#) [Click to Upload CSV File ^](#)

Upload ITR-1 (Group) CSV File

Step 1 - Ensure that you have prepared your ITR-1 (Group) spreadsheet documents and have saved them in a CSV file format ready to be uploaded. If you have not done this please go back to download the ITR-1 spreadsheet documents from "Download Spreadsheet" in the Tasking Zone.

Step 2 - Assessment Year **2009 - 10**

Step 3 - **ITR-1 (Group) CSV File ***
Click Browse to Upload ITR-1 (Group) CSV file.

Step 4 - Your Batch Reference *
Example: **Bat001** or **A002** or **Com01** etc.

Warning : Please note - it will take **about 3 minutes**, depending on the quantity of data, to complete the uploading and validating process. Please do not click on any Tasking Zone button during this time. If you do the file upload will be aborted.

[Click here to Upload CSV File](#)

**Fig 4.3 Browse to find the files in your local system and then
click to upload CSV file**

Pick up the ITR spreadsheet file you just saved in your local system by clicking on the 'Browse' button (in just the same way as you sign in to an e-mail account and then go to your local system to pick up a file you prepared previously to attach to an e-mail). Click on the 'Click to Upload CSV File' button to upload the file to the efileready.in server.

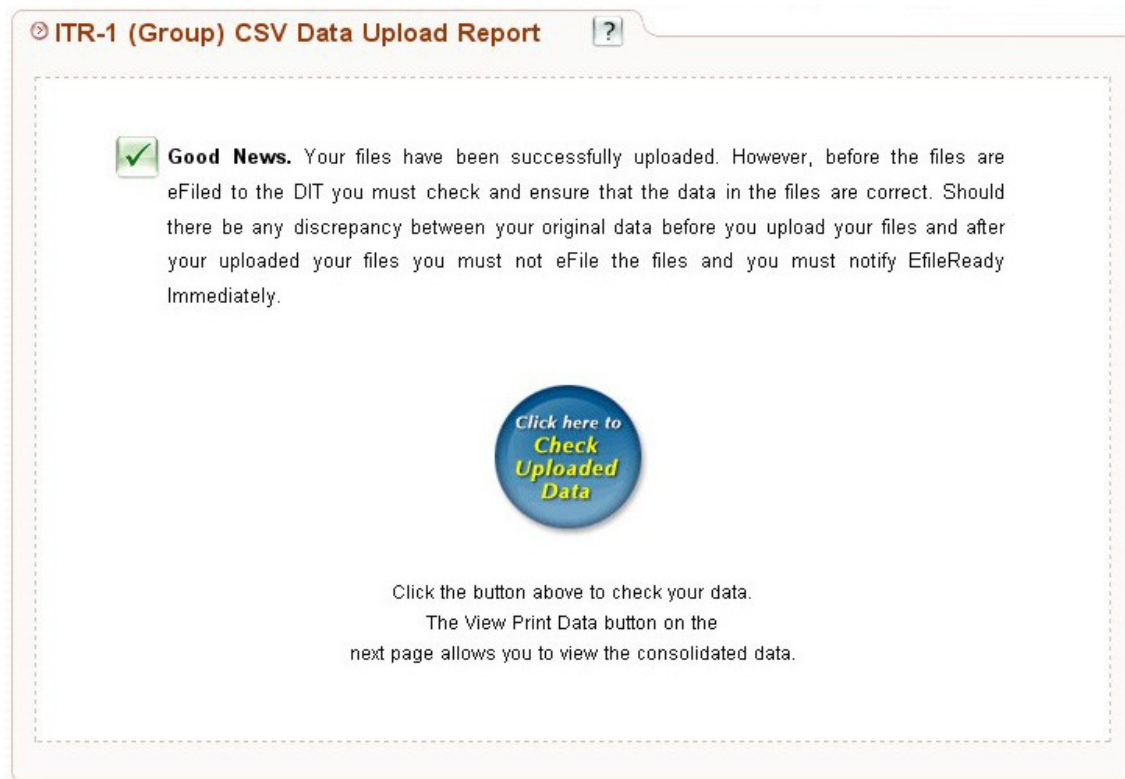


Fig 4.4 CSV Data Upload Report

As you upload your CSV files, our service instantly converts the files into XML and validates them against the DIT(Department of Income Tax) provided SCHEMA and BUSINESS RULES, ready for e-filing.

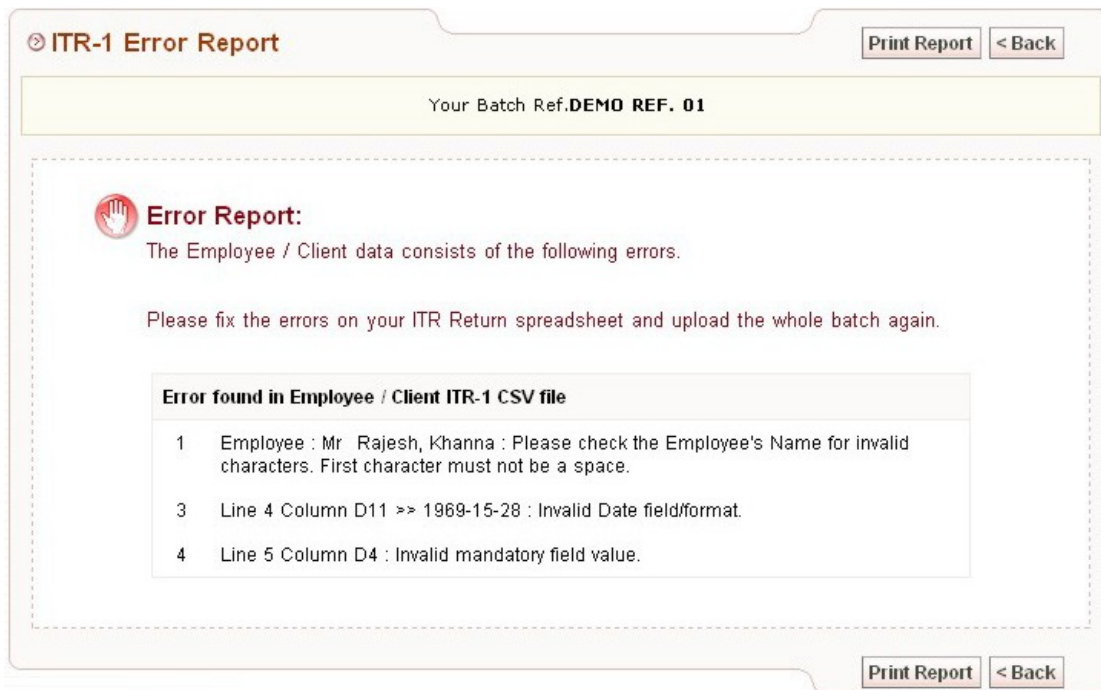


Fig 4.5 CSV Data Validation Error Report

If errors are found, an Error Report will be displayed on screen. You should amend the errors as indicated and then start the process again from Step 3.

If no errors are found in the uploaded data, select eFile Data in the Tasking Zone to proceed on to e-file the uploaded file.

Step 5. E-Filing your data

To e-file the uploaded data directly to DIT, select eFile Data from the Tasking Zone, then select the appropriate sub-menu.

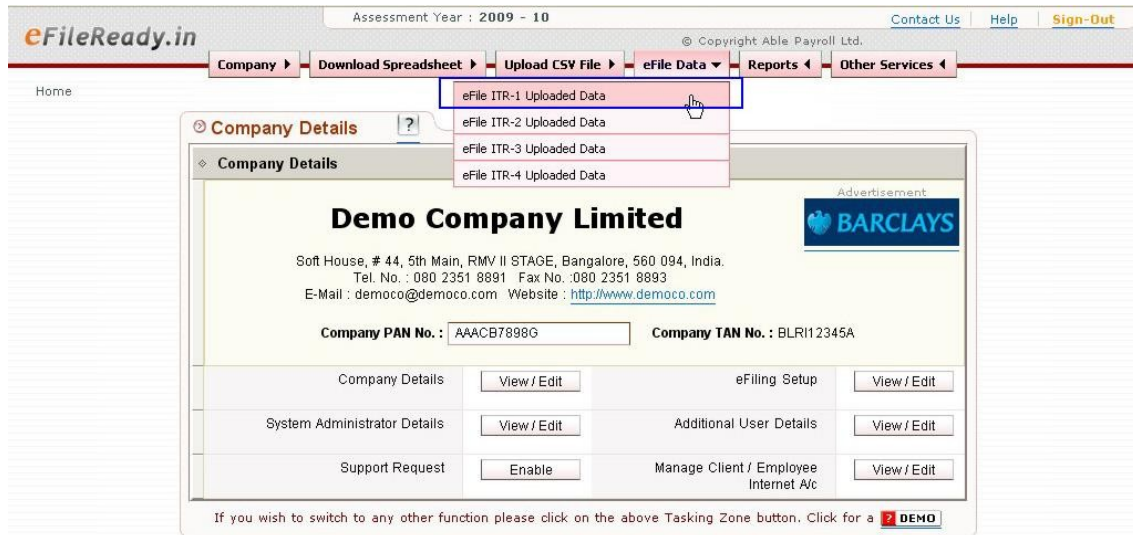


Fig 5.1 Click on the E-Filing/Status sub-menu

⊙ eFile ITR-1 Uploaded Data E-File Selected >

Assessment Year	Document Uploaded	Your Batch Ref.	Quantity	Upload Status	Remove Batch	Select to eFile
2009 - 10	ITR-1	DEMO REF. 01 (After 1st Batch eFiling 38 eFiling success 2 failed)	12	Successful	Remove	<input checked="" type="radio"/>
2009 - 10	ITR-1	DEMO REF. 01 (1st Batch 40 nos approved)	50	Successful	Remove	<input type="radio"/>
2009 - 10	ITR-1	DEMO REF. 01 (Uploaded Successfully)	50	Successful	Remove	<input type="radio"/>
2009 - 10	ITR-1	DEMO REF. 01 (Upload Failed)	-	Failed	Remove	View Error
2009 - 10	ITR-1	DEMO REF. 02	380	Successful	Remove	<input type="radio"/>
2009 - 10	ITR-1	DEMO REF. 02	121	Successful	Remove	<input type="radio"/>
2009 - 10	ITR-1	DEMO REF. 02	76	Successful	Remove	<input type="radio"/>
2009 - 10	ITR-1	Branch 1	214	Successful	Remove	<input type="radio"/>
2009 - 10	ITR-1	S_Kapoor	1	Successful	Remove	<input type="radio"/>
2009 - 10	ITR-1	K_Kapoor	1	Successful	Remove	<input type="radio"/>
2009 - 10	ITR-1	A_Kapoor	1	Successful	Remove	<input type="radio"/>

⏪ Previous Page 1 of 1 Next ⏩ | Go to Page

E-File Selected >

Fig 5.2 Click on the appropriate E-File Document link

Ensure that the uploaded status is successful before you select the batch to eFile. If you are not sure of the uploaded documents click on the Remove link to remove the batch and upload afresh.

eFiling Details & Declaration
?
< Back
Continue >

eFiling of ITR-1

(Assessment Year: 2009 - 10)

Your Batch Ref.: **DEMO REF. 01**

Batch Total: **50**

Total Approved for eFiling: **40** ?

Declaration

I hereby declare that I have checked through the Income Tax Returns I am about to eFile on behalf of my Clients and ensure the following before E-Filing the Income Tax Returns to DIT(Department of Income Tax) for the Financial Year 2009 - 2010:

- I declare that to the best of my knowledge and belief, the assessee's information given in the return thereto is correct and complete and that the amount of total income and other particulars shown therein are truly stated and are in accordance with the provisions of the Income-tax Act, 1961, in respect of income chargeable to Income-tax for the previous year relevant to the Assessment Year 2009-10.
- I have obtained the consent of my Client to act on their behalf to e-file their ITR returns to the Department of Income Tax.
- I would also like to use the password entry equivalent to signature confirmation in this page as an instruction to instruct eFileready.in to activate its ITR Internet e-Filing mechanism for us to submit the ITR documents by Internet if I so choose.
- I ensure that the assessee is an eligible person under this scheme;
- I ensure that the assessee has quoted a correct and valid permanent account number or tax deduction account number;
- I ensure that the particulars of advance tax, self assessment tax and tax deducted at source are in accordance with the documents enclosed;
- I ensure accuracy of the data entry.
- I ensure that the return of income is efiled on or before the due date for filing the return of income;
- I ensure that the Form-ITR-1, duly verified by the assessee, is filed with the assessing officer having jurisdiction over the concerned assessee;
- I will ensure to retain for a period of one year from the end of the relevant assessment year the electronic data of the return of income and the information relating to the provisional receipts issued in respect of the returns filed through it;
- I will ensure to provide to the assessee a paper copy of the e-return submitted by you and the acknowledgement receipt of Form ITR-1 filed to the Assessing Officer.

Your Personal Name *	Raj Kumar
Your Acting Capacity *	Chartered Accountant
Enter User Sign In Password * (eFileready Sign In Password)	?
Date and Time	08/05/2009 14:58:40




Fig 5.4 Enter your details on the Declaration page



Fig 5.5 Click on the 'E-file Now!' button to e-file your data to the DIT

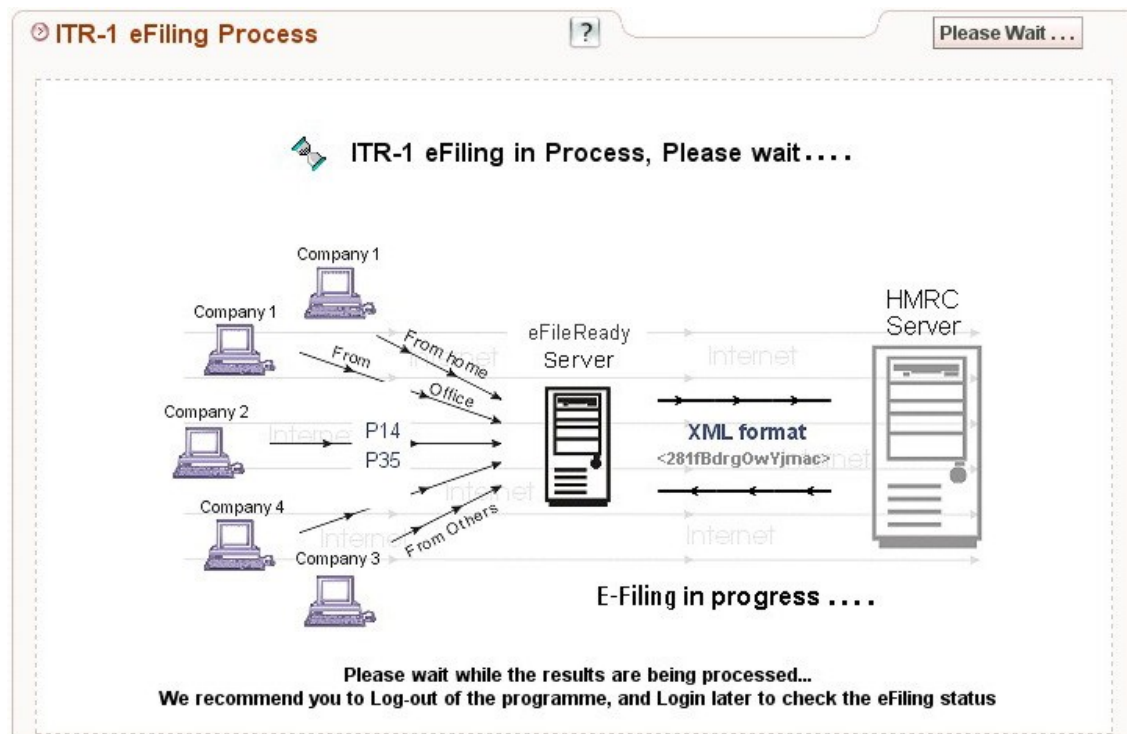


Fig 5.6 E-Filing in progress

The above diagram will be displayed as your data is being sent to the DIT. There may be a time delay before you receive a response from the DIT, especially at peak times.

During this time you can either carry out other processes in the system, or sign out and sign back in later to check on the status of your e-filing.

The screenshot displays the 'ITR-1 eFiling Status' page. At the top left, there is a tab labeled 'ITR-1 eFiling Status' with a question mark icon. The main content area is enclosed in a dashed border and contains the following information:

- ITR-1 eFiling
In Process . . .
(Assessment Year: 2009 - 10)
- Your Batch Ref: **DEMO REF. 01**
- Total No. of ITR-1: **40**
- DIT Token No. is : **5271758428**
- DIT TimeStamp : **10-04-2009 09:55:10**
(Date/Time of submission)

At the bottom of the main content area, there is a green speech bubble icon followed by the text: **eFiling of ITR-1 is In Process . . .** and 'The Internet eFiling of your ITR-1 Data to the Department of Income Tax is in Process.'

Fig 5.7 E-Filing process initiated

Check your E-filing Status.

Click on Reports in the Tasking Zone to check the status of your e-filing. If the status is shown as 'eFile Success', this means the DIT have received and accepted your e-filed submission. You can then print your e-filing Certificate as proof of your e-filing for your records.

Assessment Year	Your Batch Ref.	Uploaded Quantity	Approved	Approval Pending	Rejected	Removed	eFile Success	DIT Failed	In DIT Process	View / Edit
2009 - 10	DEMO REF. 01 (2 Batch Efiled- In Process)	50	0	0	0	1	38	0	11	View / Edit
2009 - 10	DEMO REF. 01 (After E-file result)	50	0	5	4	1	38	2	0	View / Edit
2009 - 10	DEMO REF. 01 (1 Batch Efiled- In Process)	50	0	5	4	1	0	0	40	View / Edit
2009 - 10	DEMO REF. 01 (Uploaded Successfully)	50	0	50	0	0	0	0	0	View / Edit
2009 - 10	DEMO REF. 01 (Upload Failed)	Failed	0	0	0	0	0	0	0	View Error
2009 - 10	DEMO REF. 02	310	105	20	5	5	159	0	16	View / Edit
2009 - 10	DEMO REF. 03	121	71	10	9	10	20	1	0	View / Edit
2009 - 10	DEMO REF. 03	76	0	0	0	76	0	0	0	View / Edit
2009 - 10	Branch 1	214	0	9	0	1	201	3	0	View / Edit
2009 - 10	S_Kapoor	1	0	0	0	0	1	0	0	View / Edit
2009 - 10	K_Kapoor	1	0	0	0	0	1	0	0	View / Edit

Fig 5.8 E-Filing / Status Batch

ITR - 1 Individual Report - eFile Success List

Search Result for the term "Kapoor" Assessment Year: 2009 - 10

Individual Ref. No.	Name	PAN No	E-Mail ID	Telephone No.	Your Batch Ref.	Status	View / Print	eFiled Certificate	Select to Print
DEMO05	Shahid Kapoor	DELAO2603G	shahid@mail.com	9886315254	DEMO REF. 04	eFile Success	View / Print	View / Print	<input type="checkbox"/>
DEMO05	Ranbhir Kapoor	QELKO345F	ranbhir@gmail.com	8022228845	DEMO REF. 04	eFile Success	View / Print	View / Print	<input type="checkbox"/>
DEMO06	Sanjeev Kapoor	NFJHO2345H	sanjeev@hotmail.com	9845000065	DEMO REF. 03	eFile Success	View / Print	View / Print	<input type="checkbox"/>
DEMO08	Shakthi Kapoor	DFSDO3412L	shakthi@yahoo.com	8512345845	DEMO REF. 03	eFile Success	View / Print	View / Print	<input type="checkbox"/>
DEMO09	Akshaye, Kapoor	KJHFO4322T	Akshaye@gmail.com	9946311110	DEMO REF. 03	eFile Success	View / Print	View / Print	<input type="checkbox"/>
DEMO10	Kareena Kapoor	DDSGO8865S	Kareena@gmail.com	8023518845	DEMO REF. 02	eFile Success	View / Print	View / Print	<input type="checkbox"/>
DEMO13	Karishma Kapoor	PUHH3455N	Karishma@gmail.com	9886315254	DEMO REF. 02	eFile Success	View / Print	View / Print	<input type="checkbox"/>
DEMO14	Raj Kapoor	JGFJJ8765K	raj@hotmail.com	8022228845	DEMO REF. 02	eFile Success	View / Print	View / Print	<input type="checkbox"/>
DEMO15	Rajath Kapoor	DELAO2603G	Rajath@yahoo.com	9845000065	DEMO REF. 02	eFile Success	View / Print	View / Print	<input type="checkbox"/>
DEMO29	Shammi, Kapoor	NFJHO2345H	Shammi@gmail.com	9946311110	DEMO REF. 01	eFile Success	View / Print	View / Print	<input type="checkbox"/>

Page 1 of 1

Fig 5.8(a) E-Filing / Status Individual

The status eFile Success means that your ITRs have been successfully eFiled to Department of Income Tax. You can further print the eFiled ITR form (can also be viewed in optional language) by clicking on the View /Print link corresponding to the respective Client. You also will receive a eFiled Certificate as a token of ITR filed acknowledgement from DIT by clicking on View /Print eFiled certificate.

View your e-Filed Certificate

ITR-1 eFiled
Certificate
for
Mr. Kapoor, Shahid
(PAN No.: AAACB7898G)
Assessment Year: 2009 - 10

eFiling Acknowledgement Number : **52717584235243**
DIT eTimestamp: 19-02-2009 16:28:47 (DD-MM-YYYY HH:MM:SS)

Congratulations: Your ITR document has been successfully
eFiled by Internet to the Department of Income Tax (DIT).

Your Batch Ref.: DEMO REF. 01

DIT Token No. is : 4534534

Inhouse Tracking Reference : AAA008068

Submission Status Report : **SUBMITTED SUCCESSFULLY**

Fig 5.8(b) E-Filed Certificate

Step 6. Appointing Additional Users

If you wish to allow additional users to access your eFileReady account, in the Tasking Zone menu click on Company, further select the Company Details. Click on the Additional User details, then click on the 'Add New User' button and enter the requested details.



Fig 7.1 Click on the Additional User Details button

The screenshot shows a web form titled "Add New System User". At the top right, there are "Cancel" and "Save" buttons. The form itself has a header bar with the title "Add New System User" and a note "(*) = required fields.". The form fields are as follows:

System User's Email to be used for this service *	<input type="text" value="user@democo.com"/>
Retype System User's Email *	<input type="text" value="user@democo.com"/>
System User's Title	<input type="text" value="Mr"/>
System User's Surname *	<input type="text" value="Bachchan"/>
System User's Forename *	<input type="text" value="Amitabh"/>
System User's Second Forename	<input type="text"/>
System User's Address	<input type="text" value="12"/>
	<input type="text" value="Golders Green"/>
Town / City	<input type="text" value="Bangalore"/>
County	<input type="text"/>
Post Code	<input type="text" value="560 001"/>
Country	<input type="text" value="Please select here..."/>
System User's Tel. No.	<input type="text" value="021939219"/>
System User's Mobile No.	<input type="text"/>

At the bottom right of the form, there are "Cancel" and "Save" buttons.

Fig 7.2 Enter the details of your Additional User

User Name	User Sign In ID	Sign In Log Book	Internet A/C Status [?]			Forget Sign In Details	System User Personal Details
			Enable	Disable	Confirm		
Khan, Aamir	AB7002654563	View	<input checked="" type="radio"/>	<input type="radio"/>	<input type="button" value="Confirm"/>	Resend Details	View / Edit
Basu, Bipasha	AB7002342534	View	<input checked="" type="radio"/>	<input type="radio"/>	<input type="button" value="Confirm"/>	Resend Details	View / Edit
Bachchan, Amitabh	AB7002564313	View	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input type="button" value="Confirm"/>	Resend Details	View / Edit
Khan, Fardeen	AB7002234754	View	<input checked="" type="radio"/>	<input type="radio"/>	<input type="button" value="Confirm"/>	Resend Details	View / Edit

Fig 7.3 Additional System User screen

On this screen, as well as adding new users, you can also control the access rights of your existing additional users, send them reminders of their sign in details should they ever forget them, and even view a log of their previous sign ins.

www.eFileReady.in
SPREADSHEET eFILING TO DIT

E-Filing Specialists

(Automated E-filing to the DIT (Department of Income Tax) at anytime over the Internet)

- 1. E-file single or multiple IT returns using a spreadsheet/CSV file**
- 2. Supports E-filing of ITR 1, ITR 2, ITR 3 and ITR 4 forms to DIT**
- 3. Provides multi-lingual reports facility to print or email**

[Click here to log on to www.EFileReady.in](http://www.EFileReady.in)

(For more information about our products and services,
please contact our Support Team.)

Support Email: **Tushetha@efileready.in** Tel: **080 4167 4123**