

2021

# GUIDELINES FOR CUSTOMERS

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(Changes are highlighted in RED Color)



## ABOUT US

SAG Infotech was founded in the year 1999, in Jaipur city of India as a proprietor firm and we incorporated SAG Infotech Pvt Ltd in May 2010. SAG Infotech is sincerely committed to achieve customer delight and best quality of services and products.

SAG is the leading provider of taxation software solutions. SAG enables professionals to accelerate and maximize their lead taxation process with their complete suite of solutions that identify the right leads, & ensure proper results.

We offer many products like :- Genius, GST, Complaw, XBRL, Payroll, CA Portal, Election Manager for the Indian market in the Areas of Taxation, Finance & Accounts. Which are best in class and recognized as a revolution in software development for large scale Business corporate houses, chartered accountants, company secretaries, advocates, for other business association and across industrial verticals?

We are working in following six fields of businesses and society, delivering the best of solutions and services:-

**SAG Infotech:** - Our first step, dealing with our wide range of software's for chartered accountants, company secretaries, advocates, human resources managers, banks and many more different types of company's.

**SAGIPL:** - Dealing with our overseas market, web design, android and i-phone development etc.

**SAG DSC:** - SAG DSC is our segment which exclusively deals with the digital signature services for the clients.

**SAG BPM:** - it's our business process management unit providing outsourcing services for finance and accounting.

**SAG ACADEMY:** - SAG ACADEMY (Tejaswani Bhavah) a training and development initiative by SAG has been created out of this need, developed and driven by a holistic approach.

**SAG MART:** - SAG MART is our online informative portal offering you true and essential information about various categories related to real world that helps you when you are going for shopping.

**SAG RTA – Rajasthan's 1st Registrar & Transfer agent (RTA),** engaged in providing various share transfer & share registry related services viz. Dematerialization, IPO/FPO, Bonus Issue, Right Issue etc. to Listed & Unlisted Companies.

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## 1. SOFTWARE REGISTRATION

You have two options for Software Registration (1) Offline Registration, (2) Online Registration. At the time of Registration Client will provide the Sale Details-

- CONTACT PERSON'S NAME
- COMPANY NAME
- ADDRESS
- CITY
- STATE
- PIN CODE
- MOBILE NOS
- PHONE NOS WITH STD CODE
- EMAIL ID
- REGISTRATION TYPE (HARDWARE LOCK / ONLINE)
- NO. OF LAN

### Important Guidelines

- Activation code is very important. Therefore you are especially instructed not to disclose this for maintaining security of the licensing of software.
- You have to provide the **Company's/Owner Email ID** only, for Software Registration because all the information regarding the Activation or Surrender of software's will be communicated through this e-mail address only and this email address must be active till when you are using our software. So kindly ensure that Staff Email Id is not been used for Software Registration.
- Mobile number is compulsory in order to notify about the latest updates and information regarding software.
- Once the Firm name is mentioned then it will not be changed subject to terms provided in the Guidelines. So please check all the details before submitting. You have all the details in Software itself so when you will receive the First Activation Code then check the details, if any deficiency, immediately send the mail to the company to rectification.

## 2. PRICES

- Prices for the Client for Installation and Updation of the Software are specified in **ANNEXURE - 1**. Prices can be revised any time during the Year. Company will update the revised Prices on its website and its effective date.
- Client should take care of the fact that he/she is not paying more than MRP + taxes for any product. Clients can check the website for latest MRP of all the products and can calculate the final price of the product from the link provided below:-

<http://saginfotech.com/PriceCalculator.aspx>

- Clients should always take care of the fact that they must not pay the charges which are not declared by the company in the name of software services or support, etc.
- Clients should never pay the updation charges for more than one year. That means updation charges are payable by clients for current year only for the period for which the company is issuing the Activation Code.
- Company charges for software to clients for RIGHT TO USE not for SUPPORT/SERVICES of the software. Company is permitting clients to use that software for one year only, so clients must remember this point for any future consequences. Company is allowing to the client to use the software Financial Year wise. So it is clarified to the client that date of purchase or updation is not counted. So it is clear in front of client that company is not committing any kind of services in the bill.
- We charge all applicable taxes as per the Government Rules & Regulations. At the time of final billing for the purchased software, current Rate of Applicable Taxes will be applied. Company will not entertain any amount submitted before the final billing from company's side. Client has to pay amount as per the final bill from company's side.

## 3. APPLICABILITY OF GST

We charge 18.00 % GST on our all products.

## 4. BILLING AND PAYMENT

- Before depositing any payments/dues to the company, the Client must confirm the amount to be deposited and bank account in which they have to deposit the amount. Any mistake like submitting amount in wrong account number will be borne by client only.
- If Client wishes his GST No. in Invoice issued by us then he has to send the Valid GST No at the time of payment and check the Invoice immediately when received. If his GST No is not found on Invoice then immediately

update the company on mail. If he fails to do so then it's not possible to correct the Invoice in next month.

- We will issue the Invoice only by the name of the Firm that has been Registered with us and no other name Invoice will be entertained from our end.
- Some clients deduct TDS on software purchases or any updations thereafter even though the amount does not cross the threshold limit for deduction of TDS at that time. So we will not accept the deduction if the amount is not exceeded the threshold limit. In case of deduction of TDS, clients are requested to deposit the amount deducted within due date and send Form - 16A via mail within 45 days from the relevant quarter end. In case form- 16A is not issued within due date, then your license number will be blocked till the date of issue of TDS certificate.
- If Client is depositing the amount and Bank Charges any amount in this regards then Client has to deposit Bank Charges also. If the amount is charged by Bank from our Bank Account then it will be treated that Client has deposited less amount. Examples of these types of transition are Cash Deposit, ATM Deposit etc. These charges are charged by the bank transaction wise. So Client has to deposit the Amount as per the total Transactions been done. If any client deposit the Cheque or DD or PO and is returned due to any reason Company then he has to pay the Return Charges Charged by the Bank from to the Company.
- Only, after receiving the full payment Company will issue the Activation Code. If client deposits any partial payment and wants to Activate the Software then client has to send a request mail declaring the date in written to info@saginfotech.com that, by when he will deposit rest of the payment and Company should accept the Client's request and thereafter allow the usage to the client. Maximum time limit for this balance payment will be 5 days and after 5 days your software will automatically get deactivated. In this situation every start of the software, must require Active Internet Connection.
- Company always suggests to confirm the final payable amount on company's website or from company's official email id info@saginfotech.com. If company will receive any access amount with your total payable then Company will charge 100 Rs. for every refund transaction and then refund the balance amount after deducting the charges.
- Mode of payment is also based on the source of purchase:-
  - If you are purchasing the software directly from the company or its employees then the payment will be done in the name of SAG INFOTECH PVT LTD.

- If you are purchasing the software from dealer then firstly check the dealer Certificate or Mail to the Company and if its satisfactory then make the payment in the name of the dealer.
- Client has to send the Payment details in following manner to the company mail id from his registered Email Id –
  - CONTACT PERSON NAME
  - COMPANY NAME
  - ADDRESS
  - CITY
  - STATE
  - PIN CODE
  - MOBILE NOS
  - PHONE NOS WITH STD CODE
  - EMAIL ID
  - REGISTRATION TYPE (HARDWARE LOCK / ONLINE)
  - NO. OF LAN
  - PAYMENT MODE
    1. CASH DEPOSIT SLIP
    2. CHEQUE DETAILS – BANK NAME OF CHEQUE DRAWN, CHEQUE NO., AMOUNT
    3. NEFT – NAME WHICH REFLECTED IN COMPANY BANK ACCOUNT, UTR NUMBER
    4. IMPS DETAILS – IMPS NO, REFERENCE NO
    5. ONLINE PAYMENT – Subject to 2.30 % Additional Charges.

## 5. DECLARATION FORMS

Company has notified the Declaration Forms (Except GST Desktop Software w.e.f. 01-04-2019) for LAN / Software Surrender / Change of Email ID etc. Client should check the validity of the Form before sending to the company. Form should be properly filled up, all fields to be filled, signed by the authorized person, company seal (If Applicable), no alteration in the form language and Declaration should be send from Registered Email ID. If any changes made by the client in the form and sent to the Company then the liability will be of the Client only. Company will not be liable in that case because Client has alter the Language of the predefined Form. **LAN Declaration will not be work in case of Thin Client/Online SAG Server/RDP or similar services.**



## 6. COMMITEMENT TO THE CLIENT

Any verbal commitments from the employee and dealer of the company to you regarding sales, updation, price, amendments in software, etc will not be entertained by the company until and unless it's not taken in written conformation from us through email [info@saginfectech.com](mailto:info@saginfectech.com) only.

## 7. SOFTWARE SERVICES AND SUPPORT TO THE CLIENT

Dear customers company is having two streams of service support:-

- **If you purchase the software from company-** If you purchase the software directly from company – Company is not liable to give any service or technical support to the client (Please refer point no. 2.5). Still as a company we have small technical support center where we provide technical assistance to our clients but that to be matter of availability of technical support executive, availability of free phone lines etc. however Company is not bound to give any sort of technical support/service to the clients.
- **If you purchase the software from Company's Dealer** – If you are purchasing software from dealers, then complete technical and service support will be provided by the dealer, because the main motive of company to appoint any local dealer to your area is to provide you better services and connectivity from the company. If dealer is not providing you proper services and support then please send a complaint mail to us at :- [info@saginfectech.com](mailto:info@saginfectech.com) .
- Now we are in the transforming phase and our office timing will be changed from 1<sup>st</sup> July 2016. Company is going to 5 days a week and timings will be 10:00 am to 07:00 pm however company will provide lesser support on Saturdays between 10:00 am to 05:00 pm. Lesser support means there will be less availability of number of Technical Support Executives as well as no availability of Professional Staff (CA, CS) responsible to solve calculation related queries. Company office will be closed on National Holidays. (Refer holiday list on our official website [www.saginfectech.com](http://www.saginfectech.com))
- We have no Missed call facility or we will not call back to the client if client missed call to us or e-mail to us to call back. If Client has any query then client will call to us. If the company phones are busy then our existing system intimates to us and we will try to call you as soon as possible.
- **No Door to Door services** - Client call us to provide installations/Updation services at their place of businesses. It becomes expensive for us to engage one person for each client since the installation/Updation charges are nominal. So clients are requested that in case of door-to-door services, company will not bear the on-site expenses of the employee sent at the client site. Client will have to bear all the lodging & boarding expenses of the employee for the period such person is on-site. Because we are charging

from clients for Software Usage charges not service charges. We are providing a Product and we are giving it to clients on RIGHT TO USE basis. Even though for some convenient of clients we are providing Live Support option. If still client wants at door services then cost of the service will be bear by client only.

- **Live Support** - We have also received some complaints regarding data loss of clients while updating softwares or installing other utilities. While our service support executives are busy in solving their issues, Clients tend to switch to other tasks while leaving their PCs connected to our support staff which is complete negligence on their part. We strongly recommend you to never leave your systems unattended while any Updation process is going on. In case of any negligence on the part of client, our company will not be held responsible for any data loss.

Before calling the service support team make sure that your system is operational and remote control/desktop sharing is accessible for better and fast service. If it is not available in your system, then you need to first download it from the relevant source.

Also before calling the service support team make sure that your registration details are ready in hand as we will have to verify the details of your registration in case you are not calling through registered number and we can provide support only if you are registered service receiver with us.

- **Calls through registered number only** - We only charge the clients for the installation and Updation and not for after sales services. Every time when there is change in your support staff, they keep calling us for the same issue which also effects our services, so you need to keep in mind the fact that we are not here to train your executives for the same issues again and again, it's your duty to train them. In order to cope with the above situation, we have worked out that we have to accordingly increase the LAN charges. You will also have to provide the company with a registered mobile number through which you can avail the after sales services. Calling through any other number may not help you.
- **Training of Client New Staff** - We are not obliged to provide demo/training to your new staff if any of your past employee who had initially taken the demo has resigned/left your organization. Providing demo/training to clients is a onetime activity for software providers only during first time installation. Later on, we cannot repeat the demo to any other employee since it again requires our manpower resources and time leading to low efficiency.

- **Help check** - In order to assist the client to fill data and file returns through the GST software, Help tool has been provided which contains detailed explanations, screenshots, videos, and query for how the data should be filled. So in case of any difficulty in filling data and filing returns, you may check the help facility provided in the software before calling the service support team as it will save time on both sides. In case you have any suggestions for improvement for the help tool then you write to us.
  
- **Problem in Contacting to Office:**
  - **Staff Uninformed Leaves** - We have always provided you the best support services and hope to continue the same in future also. We hire our service support executives as per our client base but sometimes due to uninformed employee leaves or during Marriage/Festivals Season, we face shortage of staff. Service support is hired on permanent basis and not on need to go basis during the year because sufficient training has to be provided to them each time. We receive bulk calls only near the due dates but hiring of staff for a temporary period may not help since they are untrained. Hiring temporary staff is not feasible and for time being if we recruit the staff then it may increase our cost due to we have to appoint for whole year.
  
  - **Schema Changes** - Department sometimes changes the schema without any prior intimation. We receive bulk calls in this case that we are facing problems in return filing. You are requested to first go through the website and check for any schema/utility changes and if it changed then wait for update released because we also in hurry to provide the update as soon as possible. Due to Schema Change and Update release everyone started call to us due to this all lines are busy. You are requested not to create any hustle in case of schema changes. Also after release of update in the software for any schema changes, you are requested to read all the informative messages before calling our service support team since they are provided only for client understanding. It is impossible for us to explain every client about the meaning of informative messages.
  
  - **Network Problem** - Nowadays major of telecom companies are dealing with call drop or network congestion issues, due to which many of times either client's calls are not connected or shows engaged. In this case, you need to again call to us during the office hours as this is a little bit tedious task for us to call back to each & every client, considering the financial & manpower constraint and volume of clients. Sometimes due to bad weather conditions, telecom networks are

down. You are requested to drop a mail regarding callback in case of urgent issues. Otherwise you can try the call after sometime during the office hours.

- **Third Party Services** - Our support staff always assures that your issue is either resolved immediately or it has been noted down by them for which you would receive a call back by us. Internet lease lines and telephone lines connections are operated through third party vendors. Sometimes due to Slow/Down networks and connections from the other side may lead to call connection problems as this is the most common issue faced while procuring third party services. We have no control on the third party service provider.
- **Multiple LAN Systems/Thin Client/RDP** - We have observed several times that if you are holding multiple LAN system, then you keep calling us from different numbers for the same issue at a same time. Due to which our different executives get busy solving the same issue and our other clients complains for busy lines. For example if somebody is holding 5 LANS and his/her Office person keep calling us from different numbers for the same issue then it is quite obvious that we will not be able to provide support. You are requested to call from one registered number only.
- **Portal Issues** - Sometimes the department portal faces downtime. Client call us that they are not able to file returns through the software. We receive bulk calls and mails at this situation and our service support increases. In such cases client has to check manually that the portal is opening manually or not and if the portal is working properly then you may call or mail to us.

Sometimes due to heavy traffic, department portal doesn't work effectively. Even when you try to login manually or try to upload a form directly on the website at that time it tends to slow down due to heavy traffic. So logging through the software might take time or you may face a "TIME OUT" issue. In such situations you are requested to either do the working directly on the portal if it is urgent or you may wait till the site responds properly.

Department many times changes the internal linking of the portal due to which software may face connectivity issues with the portal. Clients may wait till the time update is provided in the software.

Department portal is compatible with certain browsers only. We have provided linkages/connectivity with widely used browsers. But certain

department websites may not be compatible with any of these browsers. So clients are requested to check the browser's compatibility with the portal before calling/mailing to us for connectivity issues.

- To assist you in a better way we request you to please contact us as per the nature of your concern and in a descriptive way with complete details of whatever you want and the detail of concern department/software/employee. As per the nature of your concern, below are the contact details:

- Suggestions – We always take our customer's opinion on top priority and always welcome valuable suggestions from the customers. If you have any suggestions related to software features, related to software UI, related to software scope of software then kindly send your detailed suggestion mail on [suggestion@saginfotech.com](mailto:suggestion@saginfotech.com)
- Technical Issue - We take utmost care when we develop the software but still some errors are beyond our control and if you face any kind of error which you are not expecting, if your software is not functioning properly, if you are getting any trouble while installation then kindly send your detailed mail at [techsupport@saginfotech.com](mailto:techsupport@saginfotech.com)
- Calculation/Data Misinterpretation Error/ Data Execution Error - If you receive any fact and figure which you might not be expecting, any wrong figures which comes after the calculation of the software, if you find any wrong acts, rules and regulation then kindly send your detailed mail at [expertsupport@saginfotech.com](mailto:expertsupport@saginfotech.com)
- Complaint - If you are facing Misbehavior from any employee or dealer, if you are not getting proper support on time, if someone is providing you any information which misleads you then kindly send your complaint details at [grievances@saginfotech.com](mailto:grievances@saginfotech.com)
- To Escalate the issue - If you think that you have not received any solution from above email id's and your problem is still not solved then kindly send your detailed mail at [info@saginfotech.com](mailto:info@saginfotech.com)

Any correspondence will be contained -

- Contact Person's Name with Contact Nos
- Software Name
- Software Hardware Lock or Serial No.
- Mail should be from registered Email ID otherwise we will not consider.
- Mail should contain all the matter for which its send.

- If the mail is sent to wrong Mail Id then it will not be attended. For e.g. any suggestion send to technical issue mail id then it will not be entertained.
- Only matter relevant to the above mentioned issues the mail should be sent on respective Email ID's.
- Mail should not be send or CC to any other Mail ID's of the Company.

## 8. HARDWARE LOCK

- Hardware Lock cost is extra from Installation or Updation Charges.
- Hardware Lock spoils due to any of the reasons or shifting the Registration type Hardware Lock to Online Registration then you are required to send the Lock to company for replacement. Lock replacement cost (Lock purchase price) will be applied in this case. Therefore, you have to be very cautious while handling this Lock because if it's lost then, you have to subscribe for new software and the Cost of New Software will be Chargeable at MRP of the Software.
- If you are using two software's viz. Genius & Payroll on two different systems keeping a separate lock for each & afterwards (due to any of reason) if you wish to merge in the single system then you have to Return back to the Company one Hardware Lock after holding the Final Lock in which you wish to take both the registrations and no amount will be refundable for Returning Lock.
- If you are using two software's viz. Genius & Payroll on a single system with one Hardware lock and later (due to any of reason) if you demand to use in the separate then you are required to Return back to the Company the lock and can take the replacement for two key locks after paying the cost of both the Locks and no amount will be refundable for Returning Lock.
- Client has to courier the Hardware Lock in a Separate Courier in which Hardware Lock must be single product. Before sending the courier Client has to send us a mail at [info@saginfotech.com](mailto:info@saginfotech.com) elaborating the details of Hardware locks. After receiving the Hardware Lock Company will acknowledge the Receipt. If Company will not receive the Hardware Lock due to misplace by the Courier Company then client has to pay the New Software Registration Charges (MRP of the Software which was registered on the Hardware Lock).
- In the process of converting your software from offline to online, Company will be requiring the Hardware Lock from you in 7 days from the date when Company converted your software. The converted online software will come with 7 days validity and automatically expire on 8th day therefore you must send the Hardware Lock to the company in 7 days. In this situation every start

of this software must require Internet. Without receiving the Hardware Lock Company will not entertain any request for continuing the software services.

Example – On your request, if company have converted online software on dated 01-01-2016 then you have to submit the hardware lock latest by dated 07-01-2016 and if Company will not receive the hardware lock till 07-01-2016 then on dated 08-01-2016 your software will automatically gets deactivated.

## **9. SOFTWARE IS NON TRANSFERABLE**

Software is not transferable it can only be registered to one client who has initially subscribed. Once a client has taken the registration in personal name and wants to transfer the software to his / her firm name then he / she has to provide some authentic documental proof in order to transfer the registration.

In the recent days we receive a lot of requests for name change since the registered name differs. So in order to client requests for name change. We would like to bring to your notice that changes may/may not be allowed in these cases:

- No change will be allowed in the Name of the business/Name of the Buyer after registration has been taken. Address and contact details can be updated at a later stage if required.
- In case of merger/amalgamation of the business, above clause will not be applicable. Change in the Name of the business/Name of the Buyer can be made in these cases provided sufficient proof is submitted that the company has been merged/amalgamated.
- In case any employee purchases the software in his individual name then change in registered name will not be allowed except converts itself to proprietorship concern, then name change will be allowed since the pan number is same in this case.
- In case if any individual purchases software in his name and thereafter entered/associated in any partnership firm or any organization then no change in name will be allowed.
- If there is any dissolution of a firm or liquidation of the company or close of business on whose name Registration has been taken then license is considered as surrendered.

And in all the request for change in name must be accompanied by proper proofs. We have already provided Software Registration Details in software itself. In case of Invoices issued pursuant to Updation/New software purchased, details can modified (as per Client Guidelines) by the client only before the issuance of invoice. In this case also, no details can be changed after issue of invoice or no

changes/modification in Invoice will be entertained after 2 days from the completion of month in which invoice is issued in any case. Invoice will be issued in favor of Registered details only. In case of purchase of any software in any scheme, then changes in the Registration Details in future will not be allowed in any case e.g. Women's Day Scheme, CA Day Scheme etc.

#### **10. SOFTWARE TRAINING TO CLIENTS**

Company will not provide training to all the staff of the clients. So authorized person must take the demo of our software.

If client is not taking training of our software himself / herself and some staff is taking so he / she should always keep one fact in mind that if that trained staff leaves the company we may not retrain any other employee on the same software it is the sole responsibility of the client to manage the successor of the trained employee.

#### **11. COMMUNICATION WITH COMPANY**

Client is compelled to use their registered mail-id for the communication regarding updations and registration details. Client must send the mail to [info@saginfotech.com](mailto:info@saginfotech.com) not any other mail ids. Sending mail to any other mail id and not from there registered mail id will be considered invalid. It should be taken care of that the Client will send the mail to the company only at one mail id which is [info@saginfotech.com](mailto:info@saginfotech.com). Client will not send any mail to any Staff or at other Email ID's of the Company. Client will mail to the Dealer first if he / she has subscribed the Software from Dealer. If the Dealer is not responding then he can forward it to the company. Client will not contact to the Company Employees on personal Nos. for any assistance.

Client should take care before sending any mail to the company that Lock or Serial No, Contact Person's Name and No, Details of the Query are mentioned in the mail. At the time of call to company Client will ask the name of person who has attended the call and tell his / her name and Lock or Serial No or Registered Mobile No.

#### **12. CLIENT LOGIN PANEL**

SAG Infotech Pvt Ltd provided his each and every client with a client login panel. By accessing this login panel client can see the complete details about product, date of purchase, registration of the product, activation code, date of activation, date of updation, Validity of Software etc. And all the other useful information regarding the software and company can be accessed by this log in panel.

#### **13. SALE WILL NOT BE CANCELLED**

Once the Activation Code will be issued Software Registration will not be cancelled. Company will not refund the amount or convert it into our other software because we provide an elaborated demo of our each and every software before the purchase, so client is aware of our software and they can judge our software prior whether it is user friendly/useful for them or not by any means.



#### 14. CONVERSION OF SOFTWARE

If any of our client is using full version of any of our software's and he / she wants to convert it to the lower version of same software, at the time of updation he / she has to send a mail to us or to communicate with us and we will convert his software to lower version, but client should always keep these points in mind at the time of conversion:-

- If client has taken the registration via hardware lock, then first he / she has to return that hardware back to us and after receiving that lock we will convert his / her software to lower version.
- If client has taken online registration then he / she has to surrender the registration first then we will convert his / her software to lower version.
- Once full version software is converted into lower version of same software then it cannot be converted again into full version. If client wishes to have that full version of software again he / she has to pay the installation charges of the full version of software again to the company.

#### 15. SUGGESTIONS

All the viable suggestions from the clients are welcomed by SAG Infotech Pvt Ltd, only if it is feasible and in favor of our maximum number of clients. Clients are requested to send one suggestion single time via mail at: - [info@saginfectech.com](mailto:info@saginfectech.com)

Please send one suggestion only single time because company is already overloaded with suggestion of our different types of clients. If your suggestion is appropriate we will surely apply it may take some time because we might already be busy in applying other suggestions that arrived to us before yours.

#### 16. GRIEVANCES

Complaint - If you are facing Misbehavior of any employee or dealer, if you are not getting proper support on time, if someone is providing you any information which misleads you then kindly send your detailed complaint at [grievances@saginfectech.com](mailto:grievances@saginfectech.com)

To Escalate the issue - If you think that you have not received any solution from above email id and your problem is still not solved then kindly send your detailed mail at [info@saginfectech.com](mailto:info@saginfectech.com)

We will investigate the matter and if your grievances are true we will definitely take a strong action against them and we will assure that the same will not be repeated and will be dealt strongly.

#### 17. UPDATE THE LATEST REGISTRATION DETAILS

Clients will update us immediately if any changes occur in the information that they have provided us at the time of registration. Clients can inform us about the changes

in their contact number, address etc by using the client login panel provided by the company to them.

## 18. LAN POLICY

1. For Multi-user, please select number of “LAN Charges” as per requirement. LAN Installation / Updation Charges will be same as applicable on the Software on which LAN facility is availed. **This will applicable in case of Thin Client/SAG Oline Server/RDP or similar services.**
2. If any client has LAN then it will not work on SAG Online Server Facility. User and LAN is different features. If client has get the Online Server from the third party or company then only one user can use the software while he has subscribed the LAN version of the software. Unlimited LAN Declaration Form option also not available in this facility.
3. In case if you doesn't want any service from Company or Dealer regarding LAN multi-user, Company / Dealer will not charge any money from you. We have provided LAN help for troubleshooting which is accessed from Help Section. To avail this, you must fill the “LAN Declaration Form” and send a scanned copy via Registered Email ID as well as Hard Copy of the same on your Company's Letter Head to our Company / Dealer.
4. At a time client can only use one mode of LAN connection, either against LAN Declaration Form (Unlimited Access) or through paid LAN connection for particular number of PC's. Client cannot avail both the types of access at the same time.

If client is having Unlimited LAN connections against LAN Declaration Form and after that he/she wants another paid LAN connection then all earlier LAN connections (against LAN Declaration Form) will be deactivated. Client cannot access LAN connections other than he/she paid for.

Example- If client is using 10 LAN connections through LAN declaration form and now wants 2 paid LAN connections; In this case company will provide 2 paid connection and deactivate 8 LAN connections.

Vice Versa- If client is having paid LAN connection and now wants unlimited LAN connection through Declaration Form, Company will deactivate all earlier paid connections and will not give any service to those connections. Also, the company will not be liable to any claim or refund for prior paid connections.

Example- If client is using 2 paid LAN connections and now takes unlimited LAN access through LAN Declaration Form, In this case Company will deactivate earlier 2 paid LAN connections and previously paid charges

against the LAN will not be refundable and also company will not give any service to that 2 paid connections.

## **19. ERRORS LIABILITY CLAUSE**

Company always try to minimize the chance of errors in software, but as software is a technical product therefore errors are something which can occur any point of time therefore Company is not liable for any loss of your data, any financial loss due to our software, any calculation mistakes, any other software crashes and other similar damages by any means.

## **20. SOME IMPORTANT INFORMATION**

### **Reason of Releasing of ITR Updation Delay**

Firstly, we would like to inform you that there is no particular forum of the Income Tax Department where the software developers are provided with updations and clarifications in relation to the forms and utility released by the department. Also they do not provide any direct contact details through which the software developers can contact them about the issues/suggestions in the return forms and utilities. They also do not provide any information or document to software providers regarding the changes in ITR Forms. For raising any query/suggestion, software developers also need to go through the same process as available for professional, assessee and a Layman.

We are just explaining the procedure of ITR release. At the end of financial year CBDT initially releases the Income tax return paper forms which is only the Performa merely for representation purpose for how the income after filing should appear in the relevant column & schedules. Software developers cannot provide the e-filing functionality in the software on the basis of paper return forms released by the department due to all the mapping/linkages between the relevant Columns & schedules can be judged only through the utility. After release of paper return forms, income tax department starts working on that forms. Once the department has developed the system they release schema and validation rules. After schema release the Excel utility is released by the department which do not possess any validations. And at last they release java utility. You may also note that all the calculations and processing of the return done by CPC is based on the utility released. So we have to thoroughly check the utility and after that provide the updates. We require the java utility to test the data on real time basis so as to provide the easiest way to facilitate the end users to fill the data and file the return.

Secondly you can also see that how much time the department takes after release of the paper forms to develop and release the utility. In some cases,

multiple inputs are required to be entered in the utility for arriving at a single figure of the physical return form. So it is practically not possible to build an ITR only on the basis of its physical form. The calculative and linkage part of an ITR can only be worked out once its e-filing utility is released and then only we can know that what type of information they have demanded.

You can also notice that all the return forms ITR 1 to 7 are released all in once just after the end of financial year but the e-filing utilities are released one by one. Firstly ITR-1 and ITR-4 is released by the department as these are the summarized return forms and does not require much information & validations. After that one by one ITR-2, ITR-3, ITR-5, ITR-7 and ITR-6 is released respectively. If the department, who is in possession of huge manpower and resources requires so much time to develop utilities after the release of paper return forms then a software provider will also need time to incorporate every working in the software and develop e-filing functionality in the software.

As above mentioned reasons, development of ITR takes time as it contains all the necessary validations, linkage and calculations. Even then the utilities are not fully correct as to its validity and contains some or the other errors. The department rectify these errors at a later stage and provide new schema (updates) of it. They do not mention all this in the release note. For auto calculation, checking of validation rules and linkages between several schedules of return utility is required. As utility is released at last by the department so we have to wait till the utility being released by department and then only we can provide the required updates in the software. Even after release of utility, Its incorporation in the software has to go through different phases which involves deep understanding and study of the utility and its comparison with the Provisions of the Act, incorporation of proper validations and informative messages to avoid various notices and thereafter proper testing and case to case basis checking and then providing the update.

You may also notice that, for bringing transparency & speedy processing of income tax returns, income tax department has now made major changes in return forms related to validation rules and information to be entered by assessee, due to which major of clients are receiving notices from the department for which client only blames software providers. To reduce the probability of such notices, we as service providers are required to provide various validations and informative messages in the software prior to e-filing. Incorporation of all these elements in the software requires time. This is beneficial from the point of view of customer only. Defective Notices will be reduced and client will be intimated for any mistake/omissions prior to filing of returns.

### **Changes in ITR Utility without changes in Rules**

Sometimes changes are made in the e-filing utility without even updating the same in the income tax rules. You may notice that in some cases the department's utility works differently from what is written in the income tax act. All these changes are not intimated to anyone in the public domain which itself is a huge concern for us as a software developer.

Softwares are developed after considering each & every cases of clients, due to which every time when new changes and updations are released by the department, it become tedious & time consuming work for our development team since they need to again check the effects of that changes for each & every case, resultantly to which software Updation may take time.

If proper validations are not incorporated or tested in the software or e-filing functionalities are provided on the basis of paper return forms, then income will not be accounted properly and you may receive the defective notice from the department. Resultant it will increase the support on both the parts.

### **Changes Directly on Portal**

Sometimes certain changes are made directly on the website without any prior intimation to anybody.

In case you come across of any changes on the website for which functionality is not available in the software, then you are requested to inform us via mail because we don't have each and every type of login and clients to whom it will applicable. Update/functionality for the same will be provided if it is found feasible by our development team.

### **Reasons for Variance in working as per Utility**

We have provided the working under various heads on the basis of provisions of the income tax act. We cannot provide any clarifications for the working done by the utility. So client in no case should ask for the reasons for variance in the calculation done by the utility and the one done by the software if the same is as per the income tax Act in the software. Changes/Updation will be provided in the software only in case of any variance in working as per the income tax act.

### **Validation Provided in Software**

You may note that various Fields/Schedules have been added in the return forms. Client questions regarding whether any particular Field/Schedule is mandatory for them? They are not convinced with the software informative messages and they end up arguing with the support team to display the department validation. It is to be understood that we cannot explain each client for the validations put by the department. Client has to themselves cross-check all the validations for e-File generation Rules and the Govt. Utility. If Client doubts, then first he has imputing the data into Govt. Utility and check the output after that it is suggested to contact the Company for any clarification. We are bind to generate the e-File as per the instructions given by the Government, so it's not possible for us to changes in e-File generated otherwise it will not be uploaded on Portal.

### **Comparison from the Other Service Providers**

Some of the clients claim that other software providers have already provided ITR updates on the basis of physical form released by the department. However please note that this may lead to wrong calculations and variances from e-filing utilities. Functionality provided by them might contain certain errors for which they provide daily updates in the software which will ultimately lead to issuance of notices as explained above. But no one inquires or checks that the xml generated by other software provider contains correct data or not.

The return filing functionality will be made available in our software only after our satisfaction as to the fact that possibility for the issuance of notice is minimal. This will ultimately save the client's time as he will be intimated for any errors/omissions prior to filing and they will not have to deal with notices and their replies.

### **No Liability to provide all the Forms**

In the past we have received various calls and mails from the clients to provide certain forms which are not in Softwares. We would like to confirm you that there is no liability on our part to provide Forms or e-filing utility for each and every Form released by the department. Commonly used forms will be provided and no form will be provided on demand basis. It is on sole discretion of the company that which forms will be incorporated in the Software. No forms for state wise compliances can be provided as it is practically impossible for us to incorporate each and every form in the software.

### **Advance Tax Calculation**

Multiple clients complain that we do not provide full advance tax calculations on time. We would like to bring to your notice that every year drastic changes are made in the finance act by the government. In case we provide the calculations for advance tax just after the beginning of the financial year then it will not incorporate all the changes and there will be variances in the calculations and presentation of data. So you are requested to wait for the update after all the provisions of the finance act is notified. Once the finance act is notified then we will provide functionality for calculation of advance tax liability.

### **Calls/Mails for Defective Notices**

We have always tried to provide you the best solutions but certain clients mail us by attaching the back up and notice received without any explanation of the error on the part of software for the issuance of notice. Self-analyzation of the defect must be made first by the client before calling. Solution will be provided only on receiving Self-explainable mail with the complete error description on the part of software.

Also, we receive calls from many clients from their staff who do not possess knowledge of the issue and various provisions of the relevant acts. You may note that we cannot provide consultancy for making someone understand the various provisions and its effect thereafter. We assure you that if any defect/omission is identified in the software then update will be provided as soon as possible. But if defect is on the part of the client because of their non-understanding of the clauses of income tax act then we are unable to provide support for the same.

For ease in return filing on the part of the assessee, we too are providing informative messages in the software while filing the return, but still major of clients receiving the notices so it is the client who need to analyze the reason of notices and compare that to xml generated from software and if there is a calculation or presentation issues on the part of software then only we can help you.

### **Limitation of Data Storage and Processing**

From the perspective of keeping the price of software economical, we use freeware backend software (Database) in which all the Software data is stored. Such Backend software have limited data storage and features. So if there is increase in data then processing of the software will slow down because of the limited processing capacity of the integrated freeware. Increased data capacity in the freeware is a paid feature and availing such paid services is not feasible considering the price of the software we are

offering. So no mails/calls will be acknowledged for slow processing if the clients have bulk data and if the database storage limit is exhausted then there will be no support from our end.

### **Antivirus**

Some clients have an antivirus installed in their systems which may delete some files of the software due to which software stops working. Such antivirus installed on the client's system might sometimes consider software files as spam or unauthorized access consequently removing the files from the system without notifying the user. It is required to contact your antivirus provider to add software files to trusted list order to keep the files on the system. Considering any file deleted by the antivirus software, there will be no solution available for clients from our side in this case except mentioned above.

### **GST Software**

Being a completely new tax regime, changes are occurring at a very fast pace. Government itself is bringing changes in law and return forms to make it simpler for the taxpayers to deal with this new taxation system. From the first Day when GST has been launched, we have seen GSTN keep on changing and until now it is not stable. Like In Initial level, it proposed to file GSTR-2 and GSTR-3 and later on this decision was revoked, GSTR-3B was initially introduced for only two months but now it is still continued and now department has introduced ANX-1 & 2 in the form of SAHAJ (RET-2), SUGAM (RET-3) & Normal Return (RET-1). At the introduction phase, HSN wise details were required to be filled. Also proposal to file GSTR-1 & 2 was introduced in which a facility to Accept/Reject/Delete invoices was proposed for buyer & seller reconciliation. This decision was never implemented practically because of the lack of stability on the part of department. Because of these proposals and its revocation afterwards, it becomes difficult to manage software working accordingly. Due to frequent changes on GSTN website and introduction of new return forms and any changes thereafter, regular updates has to be provided to comply with these changes. So in this case you are required to co-operate with us.

From day one our SAG GST team is always trying to keep in pace with portals latest changes by incorporating the same on timely basis. In the meantime clients may face some kind of Bug also but we always try to resolve them as soon as they are brought to our notice by our end users. We are always grateful to our clients for cooperating with us and suggestions for improvement are always welcomed.



We test the software after trying all permutations and combinations. After the appropriate testing phase, update is provided to the end users. Having released such update, it may be the case that the client data may not fall within our tested permutations and combinations. Sometimes it happens that certain forms are available for specific logins. Since we do not have logins for all the forms, testing of such special cases are not possible. In case of any such special case, you may write to us on our official mail id along with the data and login details. Update will be provided as soon as possible in case any modifications are required on our part.

Initial development of the features and return forms in the software is based on the real time data we have. After preliminary development, we receive suggestions from the actual users and based on those suggestions, functionality is upgraded and multiple reports are provided to the users. For incorporation of the suggestions in the software, software providers require time since all the data has to be checked in real time.

Sometimes it is observed by the users that the portal shows incorrect data/output in spite of all the details filled correctly by them. This is purely a technical bug/issue on the part of portal and we, the software developers in no case are responsible for wrong data being shown on the portal. We receive multiple mails/phones for data mismatch on the portal. No such mails/calls will be acknowledged by the company since the software company is not responsible for any data mismatch on the portal from their books. So in this case client is requested to raise their grievances at the GST portal and not mail us for this issue since we cannot provide support for the same.

We have observed that sometimes the client call/mail us that the imported data from the portal through direct mode differs from the data available on the portal. Because of the bulk data, it might happen that data is not correctly extracted from the portal. In this case you are requested to import the data through file mode (Zip file) for correct output. If after importing data through zip file mode differs from the actual data then you may write to us.

Clients demand various reports as per their usage. We have already mentioned earlier that only widely used reports will be provided and no report will be provided on demand basis since this requires sufficient manpower and maintenance to develop and manage such reports in the software. If the client still demands for any of such report which is not widely used then such service will be separately chargeable according to the man hours needed to develop such report and incorporate the same in the software.

### **Reasons of Increase in Updation Prices of Software from Coming Years**

**Multiple LAN Systems/Thin Client/RDP** - With an increase in the workforce of a company, the cost and manpower charges increases. A company with 20 person will always bear more costs than a company with 2-3 person. Similar is the case with multiple LAN systems. If someone is working on one PC then support can be given to one only. Now in these days Customer is submitting LAN Declaration or lesser amount paid for LAN PC but we have to provide the support for each and every person who is operating on LAN. We are charging the LAN amount for technical problems support or non-connectivity with server not for Software support. If the LAN are increasing then support will be increased and due to this service cost is increasing and phone connectivity problem are arising. Software is working same as Server but our service support is increased.

We are providing LAN services at a very nominal charge but you may note that LAN is full featured as Server. All the work which can be done on server can be performed on LAN also. Client call us for issues both in LAN and server. This has increased our service support cost which demands increase in LAN charges. So you may note that company can on its discretion increase the LAN charges with increase in service support cost.

**Manpower Cost** - Nowadays entire industry is facing the issue of manpower retainment. We hire semi qualified staff and provide required training to them. After obtaining requisite knowledge and experience, employees tend to switch to another organization to avail new opportunities. To retain them, we need to provide extra monetary benefits which ultimately results into increase in our costs of providing services. Today's youth is not willing to work in a calling profile or in a BPO due to which the attrition rate becomes very high and to cope up with this we need backup for extra man power and large infrastructure which eventually increases the cost. Fresher's / experienced candidates joins an organization but leaves in a short span due to many factors –

- It's a calling/support profile and repeatedly attending the calls and providing the same services again and again makes them feel like robots which leads to irritation as sometimes even the client starts using absurd language due to which the employee finally ends up quitting the job.
- As it's a sitting job they start having issues related to body and health due to which they leave the job.
- To relax their bodies they have to move here and there or even if they go to the washroom and during that time the phone keeps ringing and clients gets agitated of thinking that the support team is not responding to the calls but the fact is that during that time we cannot make the other employee sit as replacement due to limited number of employees and the infrastructure and if we try to do so then it will increase the cost.
- Growth rate is very slow in these profiles therefore after some time they look for career development opportunities and decide to change their field.

- In these years we have observed that the number of calls for support increases during a particular time span mostly during updates and for that duration we cannot enlarge the infrastructure or increase the manpower as for that the company would have to bear the expenses for the entire year which will again increase the cost to an outreached extent.

**Drastic Changes in Law** - In the recent days, there have frequent changes in e-filing rules by the department. To keep pace with these changes, regular updates have to be provided in the software. The incorporation of these changes requires manpower which results increases in our service cost. Also just after release of these changes in the software, we receive bulk calls which requires a sufficient service support team to handle the traffic resulting in increase in service support cost.

### **Withdrawal of Software Support for Windows XP Operating System**

This is to inform that Company is discontinuing support services for software installed on Microsoft XP Operating System from 1st January 2020. Microsoft itself withdrawn technical support to the XP Operating System since April 2014. Kindly note that the clients will have to update their Operating System ASAP on which they are using SAG Infotech software to enjoy uninterrupted technical support services.

**ANNEXURE - 1**

<b>Product Name</b>	<b>MRP (Rs.)</b>	<b>Updation Charges (Rs.)</b>	<b>Updation Free From the Date of Purchase</b>	<b>Updation for the Year</b>
Genius	12000.00	5000.00	01-10-2020	AY – 2021-22
Gen IT	5000.00	2500.00	01-10-2020	AY – 2021-22
Gen Bal	5000.00	2500.00	01-10-2020	FY – 2020-21
Gen CMA	2000.00	500.00	01-01-2021	FY – 2020-21
Gen e-TDS	4000.00	2000.00	01-01-2021	AY – 2022-23
Gen Payroll	15000.00	5000.00	01-01-2021	FY – 2021-22
Gen Comp Law With XBRL	20000.00	8000.00	01-01-2021	FY – 2021-22
Gen Comp Law Without XBRL	10000.00	4000.00	01-01-2021	FY – 2021-22
Gen XBRL	15000.00	6000.00	01-01-2021	FY – 2020-21
Online Payroll	20000.00	5000.00	01-01-2021	FY – 2021-22
Online Payroll – Hosting	5000.00	5000.00	01-01-2021	FY – 2021-22
Gen GST (Desktop) Without e-Way Bill & e-Invoicing	5000.00	2000.00	01-01-2021	FY – 2021-22
Gen GST Combo (Desktop) With e-Way Bill & e-Invoicing	10000.00	4000.00	01-01-2021	FY – 2021-22
Gen e-Way Bill (Desktop)	5000.00	2000.00	01-01-2021	FY – 2021-22
Gen e-Invoice (Desktop)	5000.00	2000.00	01-01-2021	FY – 2021-22
Gen e-Way Bill & Gen e-Invoice (Desktop)	7000.00	3000.00	01-01-2021	FY – 2021-22
Bulk SMS	1500.00	-	5000 SMS	
Laptop	2000.00	2000.00	-	-
CA Portal (With Domain Hosting)	10000.00	5000.00	-	-
CA Portal (With Hosting Without Domain)	9500.00	4500.00		
CA Portal (With Domain Without Hosting)	8500.00	3500.00		
CA Portal (With Out Domain Hosting)	8000.00	3000.00	-	-
LAN Charges	500.00	500.00		

## 1.2 Hosting Details

Web Space***	Hosted Domain	Sub Domain	Email Account	FTP Account	MS SQL	Hosting Type	Band Width	Hosting Panel
500 MB	1	1	10	2	1	Windows	5 GB	Yes

Note: \*\*\*This Space includes Hosting File, Email Space and Database space

### Charges for Additional Requirement (Per Annum)

#### Email

Number of Accounts	Price*
10	450/Each Mailbox
50	400/Each Mailbox
100	350/Each Mailbox

#### Space

Space Size	Price*
250 MB	500
500 MB	800
1 GB	1200

#### Other Particulars

Particulars	Price*
Domain	600**
MS SQL	500
Dedicated IP	1800
For SSL Certificates (Domain validation) with IP	4500
Domain Transfer Charges	100
Domain Renewal	600**

**Note:** \*\*For .com, .net, .org, .in, .co.in

\*Taxes extra as applicable

**RTA Charges**  
**Unlisted Companies Price Chart to get ISIN**

No. of Shareholders	ISIN Creation Base Rate	One Year AMC Charges per ISIN in Rs. Base Rate	TOTAL	Rate	Margin (On each Company)
1 – 25	7000.00	3000.00	10000.00	7000.00	3000.00
26 – 50	7000.00	4000.00	11000.00	8000.00	3000.00
51 – 100	7000.00	5000.00	12000.00	9000.00	3000.00
101 – 200	7000.00	6000.00	13000.00	10000.00	3000.00
201 - Above	Per Folio wise charges will be payable.				

**Note :**

1. Professional shall have to give the invoice to our company to release the payment in respect of margin and commission (if any).
2. If the professional wants to charge some extra amount to the customer more than standard charges then such amount shall be categorized as consulting fee in the invoice raised by the company and the professional shall give invoice in respect of their professional fee to company to get reimbursement of such margin.
3. Courier expenses shall be charged extra as applicable.
4. Taxes extra as applicable
5. Annual Maintenance charges would be charged for the whole financial year and not on monthly basis.

**Annual Offers :-**

No. of Companies	AMC Margin %
10 – 50	15%
51 - 100	25%
100 - Above	40%

**Note:** - Fees will be paid on Financial Year basis taking into consideration number of companies joined RTA and ISIN has been issued.

**Charges for other activities:**

Corporate Action Charges (If Any)	Rs. 2.00 per folio/client ID or 2500 + GST, whichever is higher
Activation of ISIN other than Equity like Preference, Debentures, Partly-Paid, commercial papers, NCD etc. (If Any)	Rs. 5000/-+GST
Details of Shareholders, Data File Preparation on record date for Dividend	Rs.2000/- + GST
Special Benpos/ Movement Register Charges	Rs. 2500.00 per day/per Benpos (If Taken)
Reimbursement of Actual expenses such As Postage, Courier, Telephone, Fax, Printing & Stationery, conveyance and any other out of Pocket expenses.	Actual Basis