

CLIENT DATA COLLECTION FOR ANNUAL FILING

Dear Users,

Annual Filing season is here, and as you know, apart from financial data, there are several additional details required from clients for preparing AOC-4 and MGT-7/7A forms.

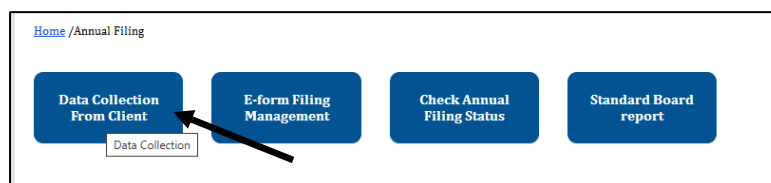
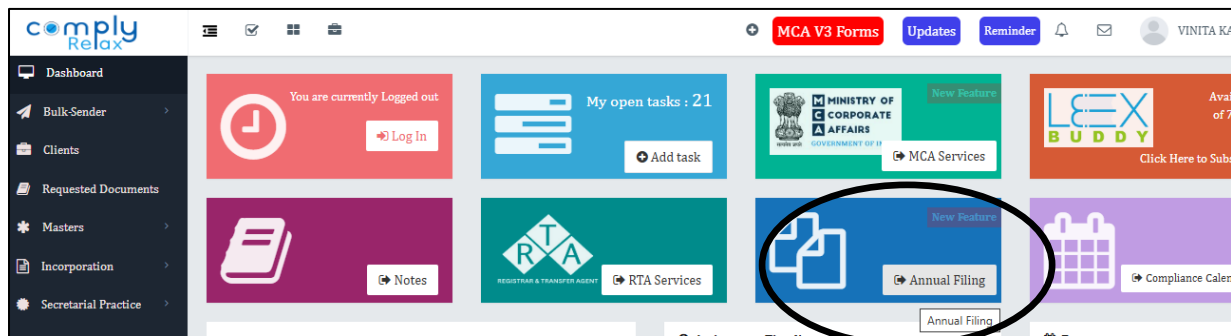
Traditionally, these details are collected over calls or emails, but we have simplified this process for you.

Now, with our new Client Data Collection Facility, you can:

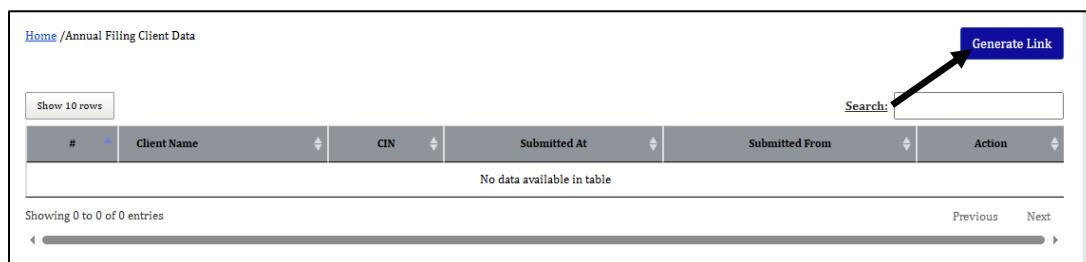
- ✓ Share a single universal link with your clients.
- ✓ Clients can directly fill in the required information online.
- ✓ Maintain a complete track of all client submissions.
- ✓ Import client-provided data directly into the forms—no more manual copy-paste.

STEPS TO FOLLOW:

Step 1: Go to your Dashboard → Annual Filing → Data Collection From Client



Step 2: Click on the “Generate Link” button.



Step 3: Share this universal link with your clients.

Step 4: Once clients submit their data, you can view the submissions in your history on the same window.

Step 5: While preparing forms, simply use the option “Import from Clients Data” wherever applicable, and the details will auto-fill directly into the forms.

Key Benefits

- Saves time and reduces back-and-forth with clients.
- Centralized data tracking and easy retrieval.
- Prevents errors from manual entry.
- One link works for all clients – easy to share, easy to manage.

This feature ensures you stay organized, accurate, and efficient during the Annual Filing process.

Start using the Client Data Collection Link today and experience hassle-free compliance!

Please reach out to us if you need any assistance:

+91 99298 22200, Call & WhatsApp both available, complyrelax@gmail.com.