



# Axis GST Connect

## User Manual

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# 1. Introduction

## 1.1 GST and GST Network

The Goods and Services Tax (GST) is an indirect tax, applicable throughout India since 1<sup>st</sup> July 2017. This tax includes 16 different taxes, including excise, service tax and VAT, and has replaced taxes levied by the central and state governments. The filing and administration of this tax regime will be conducted through the 'Goods and Services Tax' Network (GSTN).

"Goods and Services Tax" Network (GSTN) is a nonprofit organization formed to create a platform for all the concerned parties i.e. stakeholders, government, taxpayers to collaborate on a single portal. The portal will be accessible to the central government which will track every transaction while the taxpayers will be filing their tax returns and maintaining their details.

## 1.2 GST Identification Number (GSTIN)

**GST Identification Number (GSTIN)** is a 15 digit identification number that every registered taxpaying entity must have. It is similar to the existing TIN number. Every person who is liable to have a GSTIN has to register, separately for each state of business operation, with the GSTN.

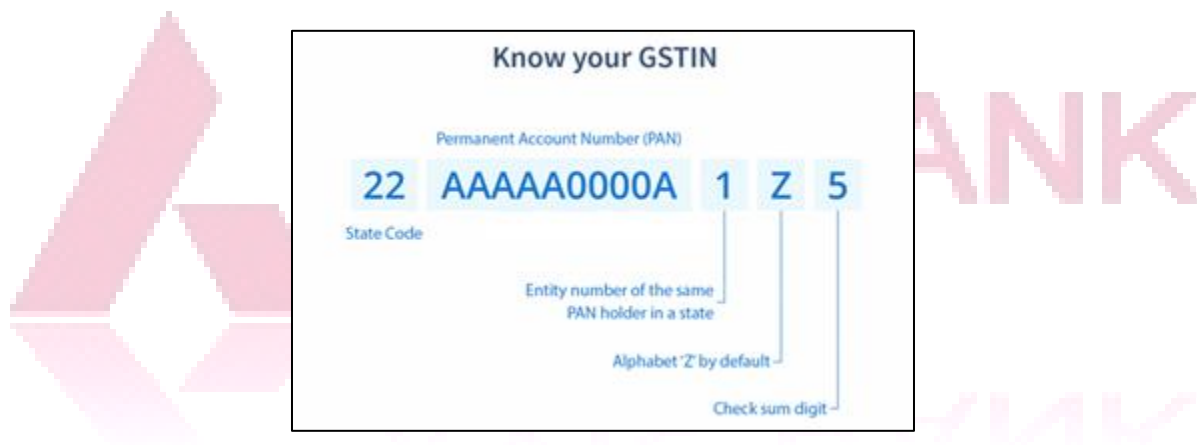


Figure 1: Know your GSTIN (Source: cleartax.in)

The 15 digit Goods & Services Taxpayer Identification Number (GSTIN) is designed to include:

- The first two digits represent the state code as per India Census 2011 (00 to 37, 99 for overseas business)
- 3<sup>rd</sup> to 12<sup>th</sup> digit represent the PAN of the taxpayer
- 13<sup>th</sup> digit is assigned to the taxpayer on the basis of their number of registration within a state
- 14<sup>th</sup> digit is Z, by default
- 15<sup>th</sup> digit is a check code (alphabet/ number)

A taxpayer can register for obtaining a GSTIN by:

- a) GST Online Portal
- b) GST Seva Kendra (by Government of India)

Once the registration is complete and approved by a GST Officer, the taxpayer obtains a unique GSTIN. There is **no cost** involved in registration for GST and/or obtaining a GSTIN.

### 1.3 GST return filing

Users can file their GST returns through Application Service Providers (ASPs), who will then connect with GSTN through GST Suvidha Providers (GSPs) to process the GST returns.

The ASPs and GSPs are envisaged to provide innovative and convenient methods to taxpayers and other stakeholders in interacting with the GST Systems – from registration of entity to uploading of invoice details to filing of returns. Thus, there will be two sets of interactions, one between the App user and the GSP and the second between the GSP and the GST System. The ASP and the GSP could be different or the same entity.

A visual representation of how the network will function –

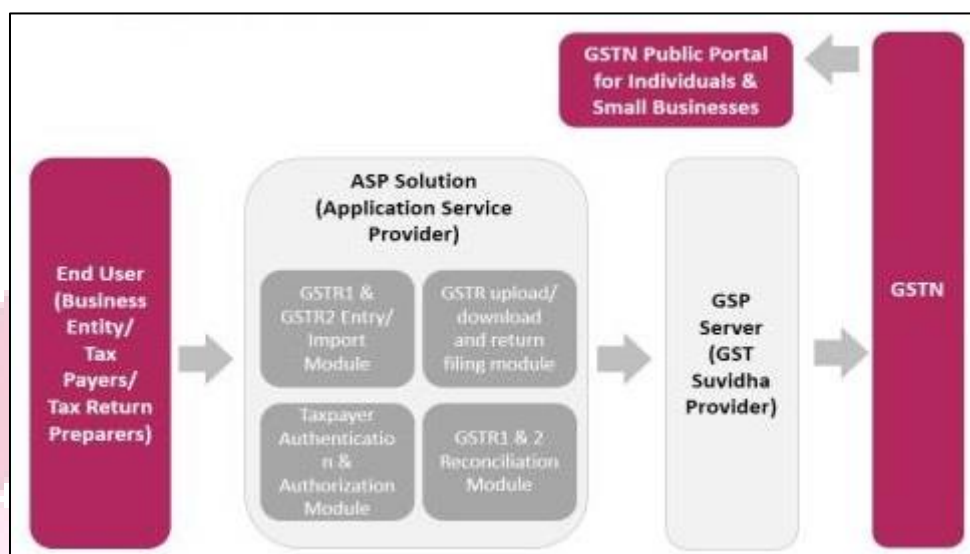


Figure 2: GST Return Filing Infrastructure

Currently, the GSTN has granted licenses to 34 GSPs.

### 1.4 Axis GST Connect

Axis GST Connect is Axis Bank's ASP solution to existing corporate customers (Small Business/Small Business and Large Corporates). This is an end-to-end solution for all GST related activities including invoice management, return preparation & filing, customer/vendor database management, reports & analytics. Axis GST Connect also provides you with utilities like Invoice Utility, GSTIN Finder, Tax calculator, offline excel utility for GSTR1 and GSTR3B, etc.

As an existing customer of Axis Bank, you can log on to Axis GST Connect on [www.axisgstconnect.axisbank.co.in](http://www.axisgstconnect.axisbank.co.in) as a tax payer and manage all your GST related transactions.

### 1.5 Benefits of Axis GST Connect (Axis Bank GST return filing platform)

To begin with, you need not have to add invoice wise details based on the category like B2B, B2CL, B2CS, and Export etc. For few categories like B2CS, HSN Summary etc. the data need to be aggregated which involves tedious work and a lot of calculations.

But with the Axis Bank solution, you can update all your sales and purchases through our standard templates (Excel based) and save data within Axis GST Connect. Axis portal will categorize and aggregate

the data wherever required. Then data will be saved to GSTN Server and Returns will be filed with all validations at a Click.

Additionally, Axis GST Connect also provides:

- i. On-screen validations with help of Masters
- ii. Extra features like free utilities and calculators
- iii. Pre filing Reconciliation with invoice sharing option
- iv. Reports & Analytics
- v. Knowledge platform for real time GST updates.
- vi. Multiple GSTIN handling in same Login

**Axis GST Connect offers many features that other services do not –**

- Multiple PAN & their respective GSTINs access in a single login
- Dashboard with relevant charts
- Sharing of invoices with your counter party with Pre filing reconciliation feature.
- Configuration feature with Item, Customer and Supplier Masters.
- Different types of Analytics & reports
- Integrated Invoicing tool
- Manual & Bulk import facility

## 1.6 GST Payments

The Goods & Services Tax has to be paid directly through GSTN website. Axis Bank has been authorized by RBI & GSTN to accept Goods and Services Tax payments, however the GST payment cannot be made using GST Connect application.

To pay the tax, taxpayer needs to visit [www.gst.gov.in](http://www.gst.gov.in) to create a challan and make payments via Net Banking or generate challan for Over the Counter payment at Axis Bank branch.

### Generating Challan

**Step 1.** Login to GSTN portal and login using your credentials

Step 2. Post login, click **Services -> Payments -> Create Challan** on the dashboard

**Goods and Services Tax**

Dashboard Services Notifications & Circulars Acts & Rules Downloads Grievance

Registration Ledgers Returns Payments User Services

**Ledger Balance** | 19/06/2017 Download

	IGST (₹)	CGST(₹)	SGST / UTGST (₹)	CESS (₹)
<b>Liability related to Return</b>	5	5	5	5
<b>Cash</b>	3180	3672	10619	3596
<b>Input tax Credit</b>	0	0	0	0
<b>(Net Liability)/Net Credit</b>	0	0	0	0
<b>Liability other than Return</b>	0	0	0	0

FILE RETURNS > PAY TAX > UTILIZE ITC / CASH >

Step 3. On Challan page, enter payable tax details and finalize the challan

	Tax (₹)	Interest (₹)	Penalty (₹)	Fees (₹)	Other (₹)	Total (₹)
CGST(0005)	10					10
IGST(0007)	9					9
CESS(0009)	2					2
Rajasthan SGST(0006)	9					9
<b>Total Challan Amount:</b>	₹ 30 /-					
<b>Total Challan Amount (In Words):</b>	Rupees Thirty Only					

**Payment Modes**

- ☒ E-Payment
- ☐ Over The Counter
- ☐ NEFT/RTGS

SAVE GENERATE CHALLAN

## Making Payment using Axis Bank's Net banking

**Step 1.** On the challan page, choose the option “E-Payment” from the Payment Modes

	Tax ( ₹ )	Interest ( ₹ )	Penalty ( ₹ )	Fees ( ₹ )	Other ( ₹ )	Total ( ₹ )
CGST(0005)	10					10
IGST(0007)	9					9
CESS(0009)	2					2
Rajasthan SGST(0006)	9					9
<b>Total Challan Amount:</b>		₹ 30 /-				
<b>Total Challan Amount (In Words):</b>		Rupees Thirty Only				

**Payment Modes \***

- ☒ E-Payment
- ☐ Over The Counter
- ☐ NEFT/RTGS

**Step 2.** Choose mode of payment as “Net Banking” -> Axis Bank (Radio button), and click on “Make Payment”. You can also download the Challan for your reference.

**Select Mode of E-Payment \***

- ☒ Net Banking
- ☐ Credit/Debit Card

**Please select a bank \***

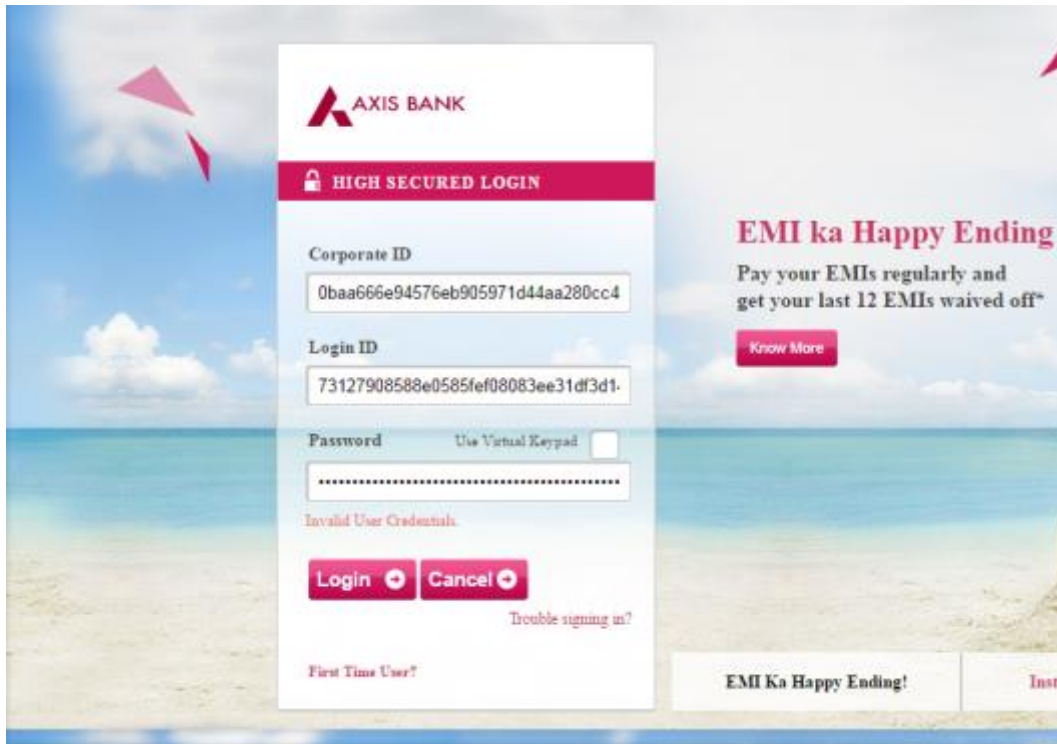
- ☐ ALLAHABAD BANK
- ☒ AXIS BANK
- ☐ BANK OF INDIA
- ☐ CANARA BANK
- ☐ CORPORATION BANK
- ☐ HDFC BANK
- ☐ IOBI BANK
- ☐ INDIAN OVERSEAS BANK
- ☐ ORIENTAL BANK OF COMMERCE
- ☐ PUNJAB NATIONAL BANK
- ☐ SYNDICATE BANK
- ☐ UNION BANK OF INDIA
- ☐ VIJAYA BANK

☒ Terms and Conditions apply.

- ☐ ANDHRA BANK
- ☐ BANK OF BARODA
- ☐ BANK OF MAHARASHTRA
- ☐ CENTRAL BANK OF INDIA
- ☐ DENA BANK
- ☐ ICICI BANK LTD
- ☐ INDIAN BANK
- ☐ JAMMU AND KASHMIR BANK LIMITED
- ☐ PUNJAB AND SIND BANK
- ☐ STATE BANK OF INDIA
- ☐ UCO BANK
- ☐ UNITED BANK OF INDIA



**Step 3.** You will be directed to Axis Bank's Net Banking page



The image shows the Axis Bank 'High Secured Login' page. It features a central login form with fields for Corporate ID, Login ID, and Password. The Corporate ID is 0baa666e94576eb905971d44aa280cc4 and the Login ID is 73127908588e0585fef08083ee31df3d1. The password field is masked with dots. There are 'Login' and 'Cancel' buttons, and a 'Trouble signing in?' link. To the right, there is a promotional banner for 'EMI ka Happy Ending' with a 'Know More' button. The background is a scenic beach view.

**AXIS BANK**

**HIGH SECURED LOGIN**

Corporate ID  
0baa666e94576eb905971d44aa280cc4

Login ID  
73127908588e0585fef08083ee31df3d1

Password  Use Virtual Keypad ☐

Invalid User Credentials.

Login Cancel

Trouble signing in?

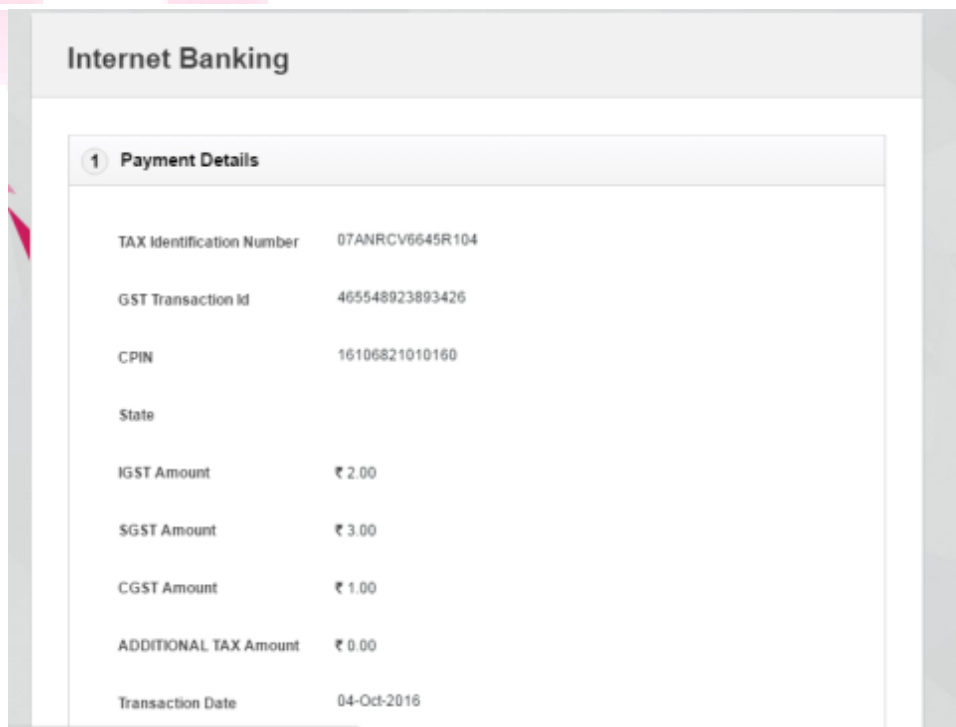
First Time User?

**EMI ka Happy Ending**  
Pay your EMIs regularly and get your last 12 EMIs waived off\*  
[Know More](#)

EMI Ka Happy Ending! [Insta](#)

**Step 4.** Login to Corporate/Retail Axis Net Banking

**Step 5.** Challan details will be auto-populated



The image shows the 'Internet Banking' interface with a 'Payment Details' section. It displays various tax and transaction details for a payment made on 04-Oct-2016.

**Internet Banking**

**1 Payment Details**

TAX Identification Number	07ANRCV6645R104
GST Transaction Id	465548923893426
CPIN	16106821010160
State	
IGST Amount	₹ 2.00
SGST Amount	₹ 3.00
CGST Amount	₹ 1.00
ADDITIONAL TAX Amount	₹ 0.00
Transaction Date	04-Oct-2016

- Step 6.** On clicking Next and post confirmation, provide the transaction password.
- Step 7.** Enter OTP received for 2<sup>nd</sup> factor authentication

004010200288194      ₹ 6.00      TEst\_CIB

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**Select Rule**

Rule ID	Authority	With Hierarchy
10000311	1 EC + 1 BOD	Yes

Level 1 Approver  **Lookup**

Please use lookup button(s) to view all users mapped to an authorization group and select a specific user as the next approver. You can skip this to send the transaction to all users mapped to the authorization group as displayed in the lookup.


Remarks For Approver

---

Transaction Password  [Forgot Transaction Password?](#)

**Confirm**

- Step 8.** Post successful payment, Payment success confirmation will be generated

 **Your Tax Payment is successfully sent for Approval.**  
Payment ID for future communication: 16545 (Confirmation has been mailed you.)

---

**E-Receipt for  
Tax Payment**

---

TAX Identification Number	07ANRCV6645R104
GST Transaction Id	465548923893426
CPIN	16106821010160
State	
IGST Amount	2.00
SGST Amount	3.00
CGST Amount	1.00
ADDITIONAL TAX Amount	0.00

Step 9. Post this, “Checker” logs in to authorize the transaction, click on Tax Payments

The screenshot shows the Axis Bank Corporate portal interface. The user is logged in as MOHANTY1. The 'AUTHORIZE' tab is selected in the top navigation bar. A dropdown menu is open under 'AUTHORIZE', showing options: Transfer Funds, Upload File(s), IPO, Service Request, Payment History, Payee Addition, Biller Addition, and **Tax Payments** (highlighted with a red arrow). The left sidebar shows 'Accounts' with a table of Savings and Current accounts, and 'Recent Transactions' with a list of transactions including internet tax payments and Esfera solutions. The right sidebar shows 'Cards' and 'Quick Pay' options.

Step 10. Checker has to select GST payment for authorization

The screenshot shows the 'Transactions' table in the Axis Bank Corporate portal. The table has columns: Date, Reference ID, Transaction Type, Frequency Type, Payee Name, and Total Ent. The 'GST TAX' transaction is selected with a red radio button. The 'Central Board Of Excise And Customs' transaction is also visible. The 'Download As' options are PDF, XLS, and CSV.

	Date	Reference ID	Transaction Type	Frequency Type	Payee Name	Total Ent
<input checked="" type="radio"/>	04 Oct '16	16545	GST TAX	One Time	GST TAX PAYMENT	1
<input type="radio"/>	03 Oct '16	16540	Central Board Of Excise And Customs	One Time	CBEC ONLINE SERVICE-TAXPAYMENT	1
<input type="radio"/>	23 Sep '16	16496	Assam EB Taxpayment	One Time	GOVT OF ASSAM TAX PAYMENT	1
<input type="radio"/>	23 Sep '16	16495	Assam EB Taxpayment	One Time	GOVT OF ASSAM TAX PAYMENT	1
<input type="radio"/>	21 Sep '16	16482	Assam EB Taxpayment	One Time	GOVT OF ASSAM TAX PAYMENT	1
<input type="radio"/>	21 Sep '16	16480	Assam EB Taxpayment	One Time	GOVT OF ASSAM TAX PAYMENT	1
<input type="radio"/>			Central Board Of		CBEC Service	

**Step 11.** Post authorization by checker, Tax payment is processed successfully

High Secured Login Last Login - 04.17 PM, 04 Oct '16 HELP Mail your CIBIL related queries to corporate.ib@axisbank.com

AXIS BANK Corporate Location Division

SNAPSHOT ACCOUNTS PAYMENTS SERVICES AUTHORIZE TRADE ADMIN

TRANSFER FUNDS UPLOAD FILES IPO SERVICE REQUEST PAYMENT HISTORY PWEE ADDITION BILLER ADDITION TAX PAYMENTS

Back to Approvals

**✓ Your Tax Payment has been done successfully.**  
Payment ID for future communication: 16545 (Confirmation has been mailed you.)

**E-Receipt for Tax Payment**

TAX Identification Number	07ANRCV6645R104
GST Transaction Id	465548923893426
CPIN	16106821010160

### Making Payment at Branch (OTC Cash or NEFT/RTGS)

**Step 1.** On the challan page, choose the option “Over the Counter” OR “NEFT/RTGS” from the Payment Modes

	Tax ( ₹ )	Interest ( ₹ )	Penalty ( ₹ )	Fees ( ₹ )	Other ( ₹ )	Total ( ₹ )
CGST(0005)	10					10
IGST(0007)	9					9
CESS(0009)	2					2
Rajasthan SGST(0006)	9					9
<b>Total Challan Amount:</b>	₹ 30 /-					
<b>Total Challan Amount (In Words):</b>	Rupees Thirty Only					

**Payment Modes \***

- ☒ E-Payment
- ☐ Over The Counter
- ☐ NEFT/RTGS

SAVE GENERATE CHALLAN

**Step 2.** Choose mode of Payment as “Cash” or “NEFT/RTGS” and select Axis bank for making payment at your Axis Bank’s branch

Select Mode of E-Payment \*

☒ Net Banking

☐ Credit/Debit Card

Please select a bank \*

<input type="radio"/> ALLAHABAD BANK	<input type="radio"/> ANDHRA BANK
<input checked="" type="radio"/> AXIS BANK	<input type="radio"/> BANK OF BARODA
<input type="radio"/> BANK OF INDIA	<input type="radio"/> BANK OF MAHARASHTRA
<input type="radio"/> CANARA BANK	<input type="radio"/> CENTRAL BANK OF INDIA
<input type="radio"/> CORPORATION BANK	<input type="radio"/> DENA BANK
<input type="radio"/> HDFC BANK	<input type="radio"/> ICICI BANK LTD
<input type="radio"/> IDBI BANK	<input type="radio"/> INDIAN BANK
<input type="radio"/> INDIAN OVERSEAS BANK	<input type="radio"/> JAMMU AND KASHMIR BANK LIMITED
<input type="radio"/> ORIENTAL BANK OF COMMERCE	<input type="radio"/> PUNJAB AND SIND BANK
<input type="radio"/> PUNJAB NATIONAL BANK	<input type="radio"/> STATE BANK OF INDIA
<input type="radio"/> SYNDICATE BANK	<input type="radio"/> UCO BANK
<input type="radio"/> UNION BANK OF INDIA	<input type="radio"/> UNITED BANK OF INDIA
<input type="radio"/> VIJAYA BANK	

☒ Terms and Conditions apply.

- Step 3.** After selecting Axis bank, generate Challan for OTC/NEFT payment at branch
- Step 4.** Take print of the challan, and visit your Axis Bank branch
- Step 5.** Meet customer care executive, and he/she will help you with GST payment
- Step 6.** Please note, only a tax payment up to Rs. 10,000 can be made in Cash via OTC challan. For tax payments higher than Rs. 10,000, please use RIB/CIB or NEFT/RTGS payment method.

## 2. Registration and Login

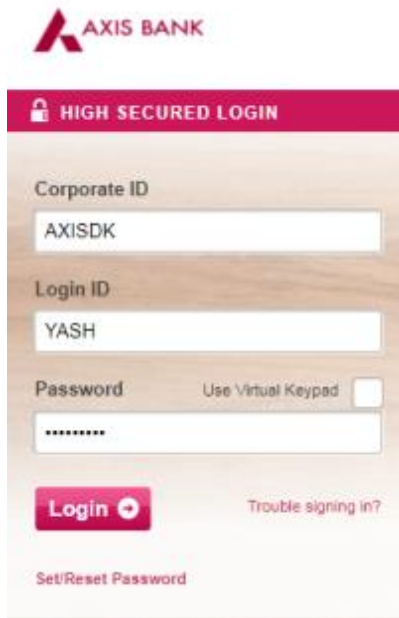
### 2.1 Registration

For accessing registration page of Axis GST Connect application, the customer must be an active user on Retail Internet Banking (RIB) or Corporate Internet Banking (CIB) platform.

#### 2.1.1 Accessing GST Connect via CIB Platform:

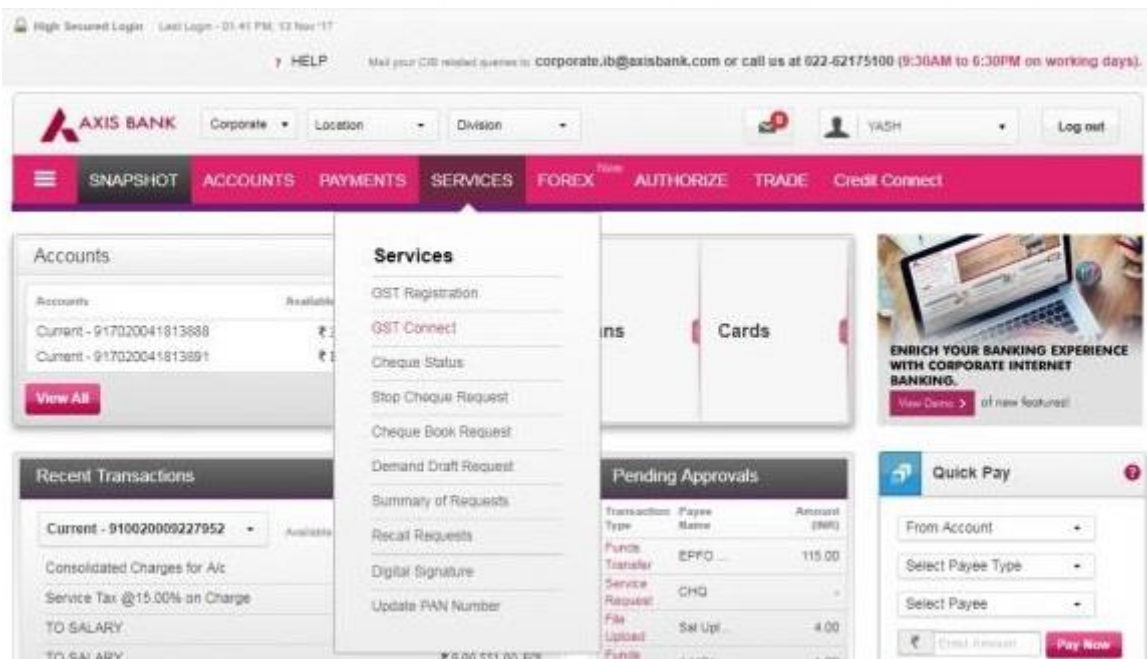
Access to GST Connect application is only allowed for “Checker” user profiles in CIB platform.

**Step 1:** Login to Corporate Internet Banking portal using Corporate ID & User ID details



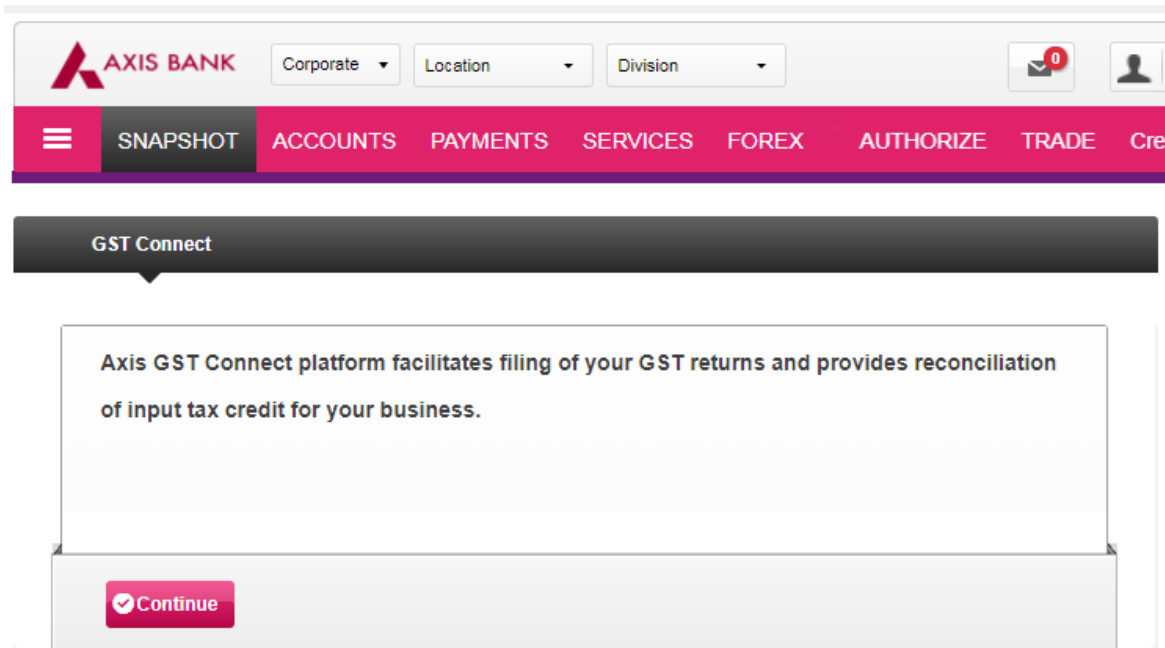
The image shows the Axis Bank High Secured Login page. It features the Axis Bank logo at the top left. Below it, a red banner reads "HIGH SECURED LOGIN". The form contains fields for "Corporate ID" (with the value "AXISDK"), "Login ID" (with the value "YASH"), and "Password" (masked with asterisks). There is a checkbox for "Use Virtual Keypad" and a "Login" button. A link for "Trouble signing in?" is also present. At the bottom, there is a link for "Set/Reset Password".

**Step 2:** Post login, click on Services -> GST Connect tab under the top ribbon

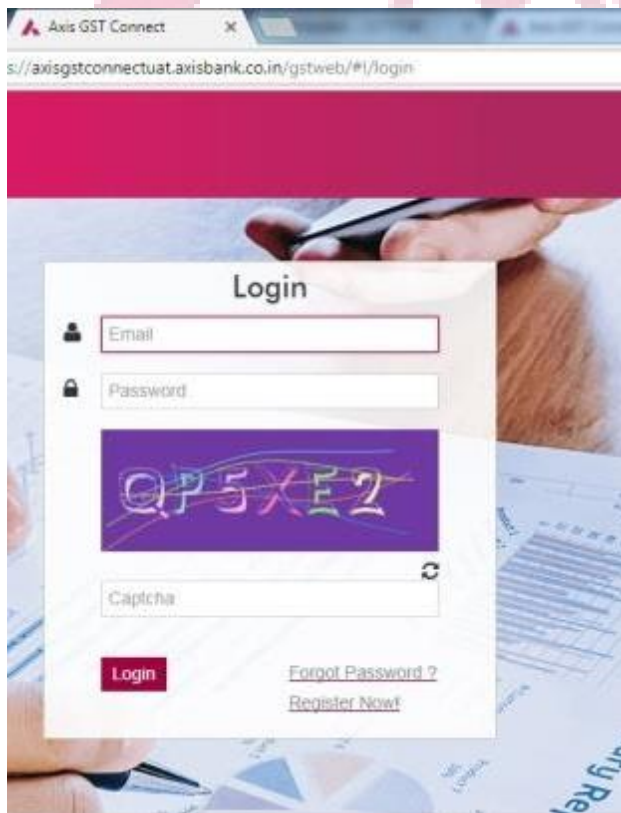


The image shows the Axis Bank Corporate Internet Banking dashboard. At the top, there is a header with the Axis Bank logo, navigation tabs (Corporate, Location, Division), and a user profile section showing "YASH" and a "Log out" button. Below the header is a red ribbon with various service categories: SNAPSHOT, ACCOUNTS, PAYMENTS, SERVICES, FOREX, AUTHORIZE, TRADE, and Credit Connect. The "SERVICES" tab is selected, and a dropdown menu is open, showing options like "GST Registration", "GST Connect", "Cheque Status", "Stop Cheque Request", "Cheque Book Request", "Demand Draft Request", "Summary of Requests", "Recall Requests", "Digital Signature", and "Update PAN Number". The "GST Connect" option is highlighted. The dashboard also displays sections for "Accounts", "Recent Transactions", "Pending Approvals", and "Quick Pay".

**Step 3:** On clicking GST Connect link, a new intermediary page will open. Click on “Continue”



**Step 4:** On clicking continue, a new window will open with GST Connect application. For best user experience, use Google Chrome version 45 or above for GST Connect application.

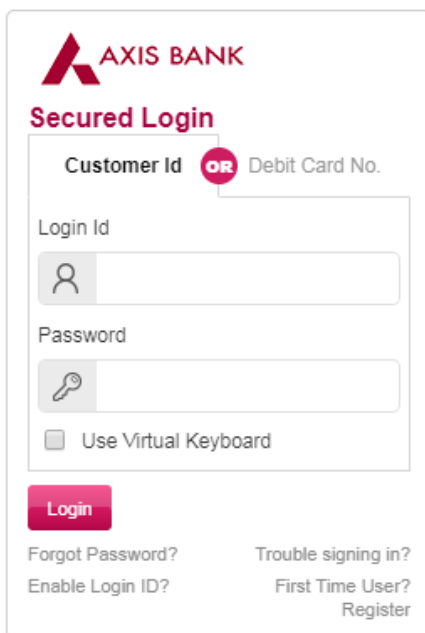


**Step 5:** Click on “Register Now” to access registration page of GST Connect application



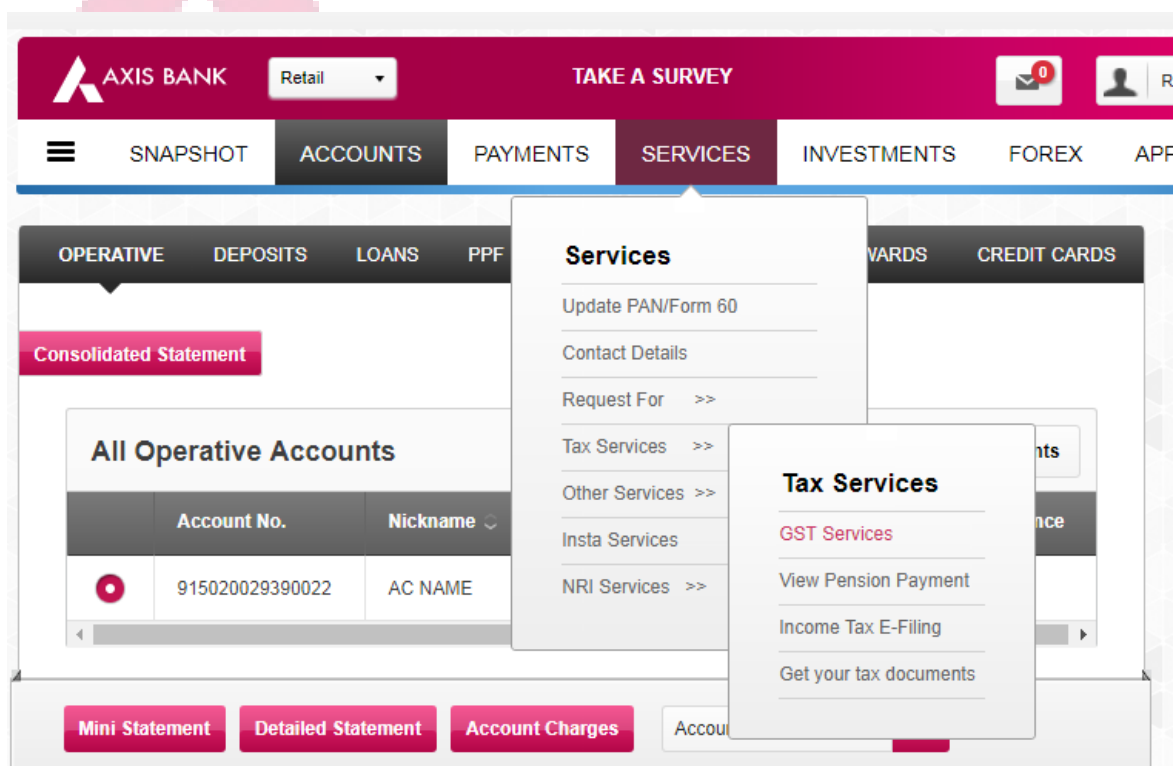
### 2.1.2 Accessing GST Connect via RIB Platform:

**Step 1:** Login to Retail Internet Banking portal using RIB credentials



The image shows the Axis Bank 'Secured Login' form. At the top is the Axis Bank logo. Below it, the text 'Secured Login' is displayed. There are two input fields: 'Customer Id' and 'Debit Card No.', separated by an 'OR' button. Below these are fields for 'Login Id' (with a person icon) and 'Password' (with a key icon). A checkbox labeled 'Use Virtual Keyboard' is present. A red 'Login' button is at the bottom left. To the right of the button are links: 'Forgot Password?', 'Trouble signing in?', 'Enable Login ID?', 'First Time User?', and 'Register'.

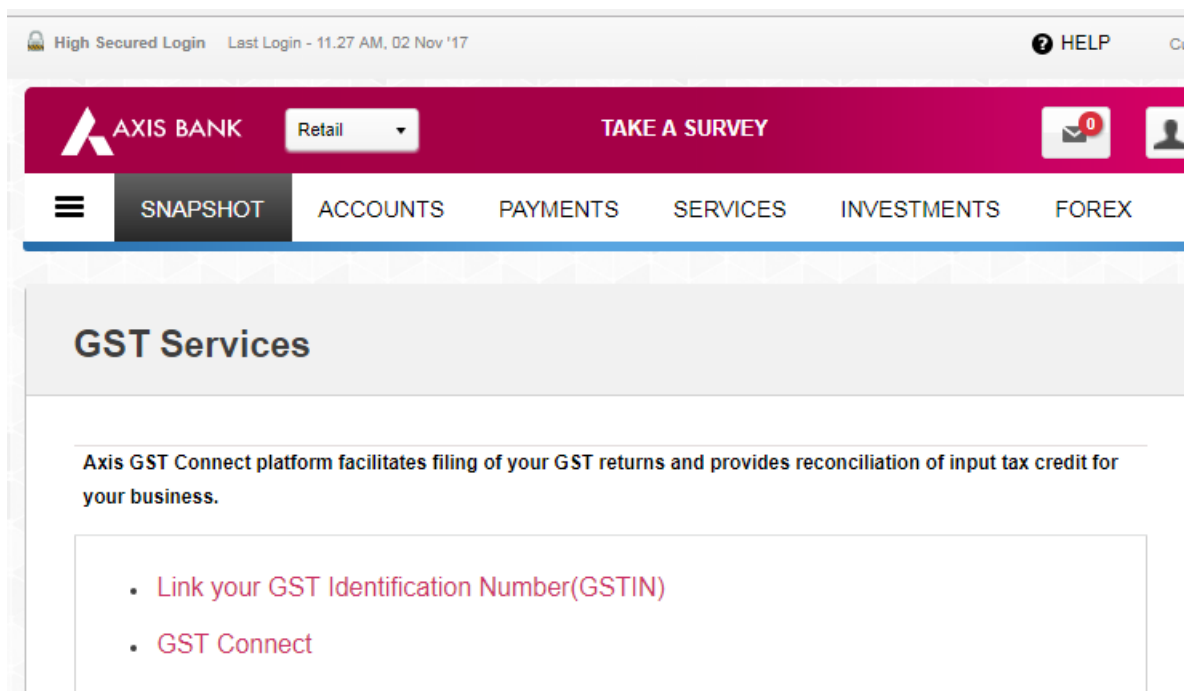
**Step 2:** Post login, click on Services -> Tax Services -> GST Services under the top ribbon



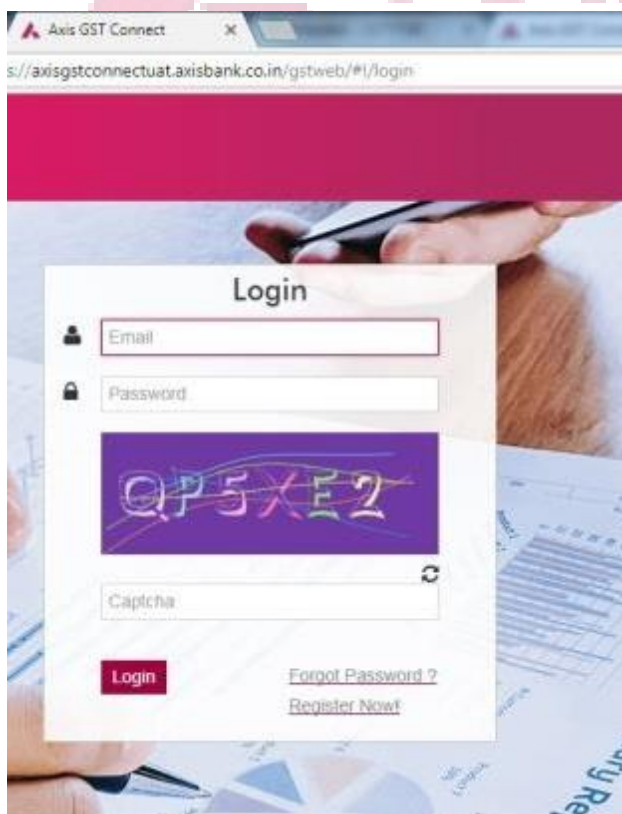
The image shows the Axis Bank Retail Internet Banking dashboard. The top navigation bar includes the Axis Bank logo, a 'Retail' dropdown, a 'TAKE A SURVEY' button, and a user profile icon. Below this is a main menu with tabs: SNAPSHOT, ACCOUNTS, PAYMENTS, SERVICES, INVESTMENTS, FOREX, and APP. The 'SERVICES' tab is selected, and a dropdown menu is open showing options: Update PAN/Form 60, Contact Details, Request For >>, Tax Services >>, Other Services >>, Insta Services, and NRI Services >>. The 'Tax Services' dropdown is further expanded, showing 'GST Services' (highlighted in red), 'View Pension Payment', 'Income Tax E-Filing', and 'Get your tax documents'. On the left side of the dashboard, there is a 'Consolidated Statement' button and a section titled 'All Operative Accounts' which contains a table with columns 'Account No.' and 'Nickname'. The table has one row with the account number '915020029390022' and the nickname 'AC NAME'. At the bottom, there are buttons for 'Mini Statement', 'Detailed Statement', and 'Account Charges'.

**Step 3:** On clicking GST Services link, a new intermediary page will open. Click on “GST Connect” link





**Step 4:** On clicking “GST Connect” link, a new window will open with GST Connect application. For best user experience, use Google Chrome version 45 or above to open GST Connect application.



**Step 5:** Click on “Register Now” to access registration page of GST Connect application

### 2.1.3 Registration process on GST Connect platform:

**Step 1.** Access GST Connect application page via CIB or RIB platform

**Step 2.** Click on “Register Now”

**Step 3.** On the next screen, enter email ID and desired password, and click “Register”

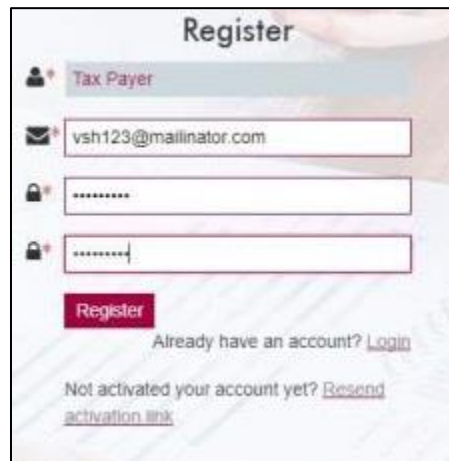
A screenshot of a web registration form titled "Register". It features a "Tax Payer" label with a person icon. Below this are three input fields: an email field containing "vsh123@mailinator.com", a password field with masked characters, and a confirmation password field also with masked characters. A red "Register" button is positioned below the password fields. At the bottom, there are two links: "Already have an account? Login" and "Not activated your account yet? Resend activation link".

Figure 3: Sample - Registration

**Step 4.** The “Terms & Conditions” will appear after this. Please read the T&C carefully and click on the checkbox against “I accept the Terms & Conditions”. Then, click “Proceed”.

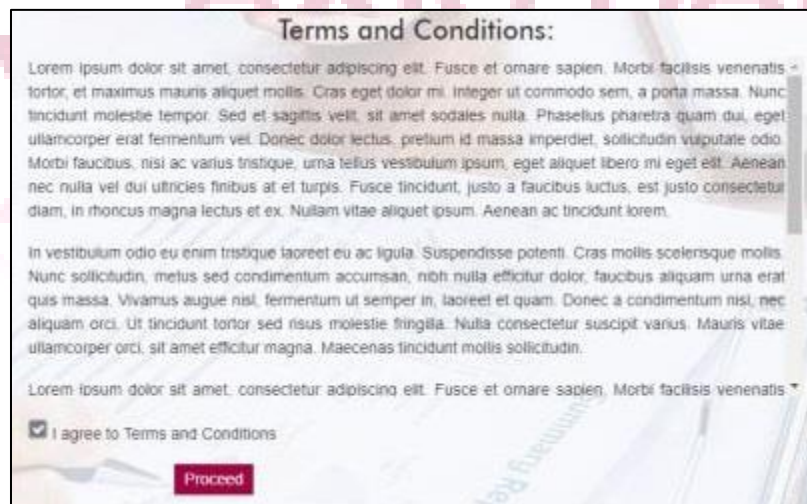
A screenshot of a "Terms and Conditions" page. The title "Terms and Conditions:" is at the top. The page contains several paragraphs of placeholder text (Lorem Ipsum). At the bottom, there is a checkbox labeled "I agree to Terms and Conditions" which is checked. Below the checkbox is a red "Proceed" button.

Figure 4: Terms & Conditions

**Step 5.** A message will now appear saying, “Successfully Registered!” Please check the registered email address for an account activation email

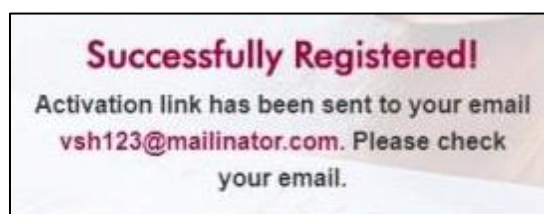
A screenshot of a confirmation message box. It has a red header "Successfully Registered!". Below it, the text reads: "Activation link has been sent to your email vsh123@mailinator.com. Please check your email." The email address is highlighted in red.

Figure 5: Successfully Registered!

## 2.2 Account Activation

**Step 1.** After registration, the account needs to be activated

**Step 2.** For account verification, an activation link will be sent to the registered email ID



Figure 6: Sample - Account Verification Email

**Step 3.** Click on the activation link or copy-paste the same in your web browser to activate your account

**Step 4.** If no activation link email is received, on the GST Connect page, click on “Resent Activation Link” to receive the email

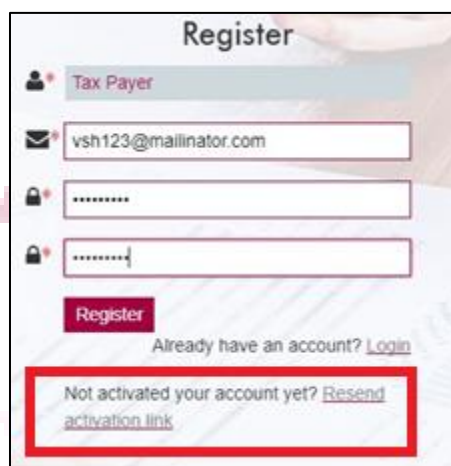


Figure 7: Resend activation link option

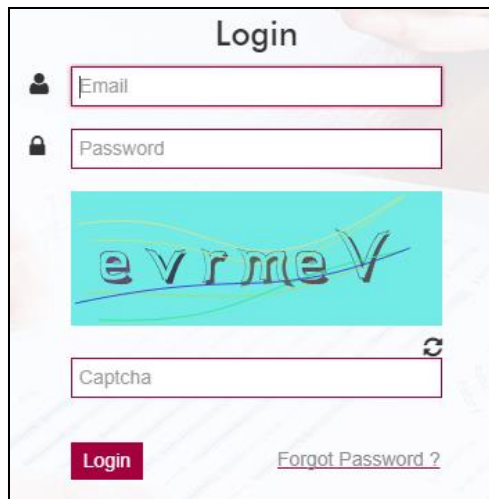
## 2.3 Account Login

To access GST Connect application for login, there are two options:

Option 1: Using CIB or RIB platform (refer to section 2.1.1 for “Accessing GST Connect via CIB platform” and section 2.1.2 for “Accessing GST Connect via RIB platform”)

Option 2: Save the URL of GST Connect application at the time of registration

**Step 1.** Using any of the options suggested above, visit the GST Connect page for account login – [www.gstconnect.axisbank.co.in](http://www.gstconnect.axisbank.co.in)

The image shows a login form for Axis Bank. At the top, the word "Login" is centered. Below it, there are three input fields: "Email" with a person icon, "Password" with a lock icon, and a "Captcha" field. The captcha image displays the text "evrmev" in a stylized font with wavy lines. To the right of the captcha field is a refresh icon. At the bottom left is a red "Login" button, and at the bottom right is a link that says "Forgot Password?".

Login

Email

Password

evrmev

Captcha

Login

[Forgot Password ?](#)

Figure 8: Account Login

**Step 2.** Enter your email, password and the Captcha shown (Required for security purposes)

**Step 3.** If you have forgotten password, click on the “Forgot Password” link

**Step 4.** On first login, enter details of your Legal/ Tax Paying Entity



AXIS BANK

AXIS BANK

## 3. Account Configuration

### 3.1 Legal/ Tax Paying Entity

**Legal Entity:** Any Business Entity with a distinct PAN number is referred as Legal Entity in GST Connect application

**Tax Paying Entity:** An entity under the purview of GST for taxation purposes and with a distinct registered GSTIN is referred as Tax Paying Entity. One legal entity can have multiple tax paying entities under it.

**Step 1.** On first login, details of Legal/ Tax Paying Entity are required. Click the button “Add Legal Entity”

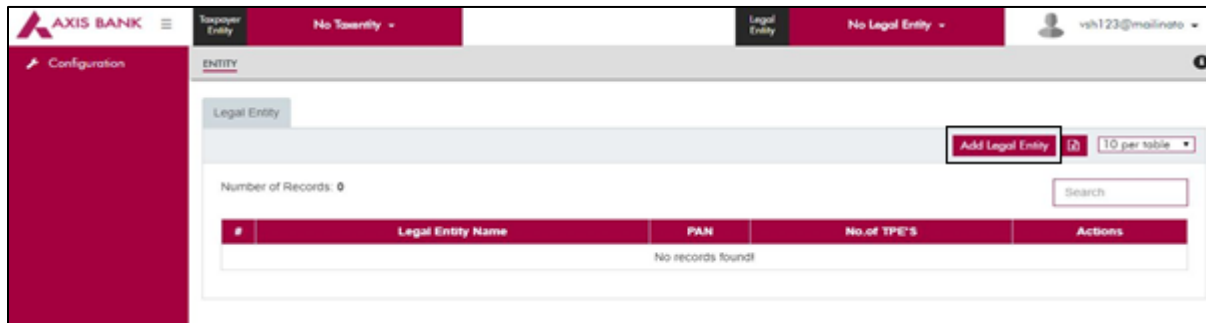


Figure 9: Add Legal Entity on first login (Part 1)

**Step 2.** Enter your GSTIN and corresponding user name. Enter the said details and click “Validate”

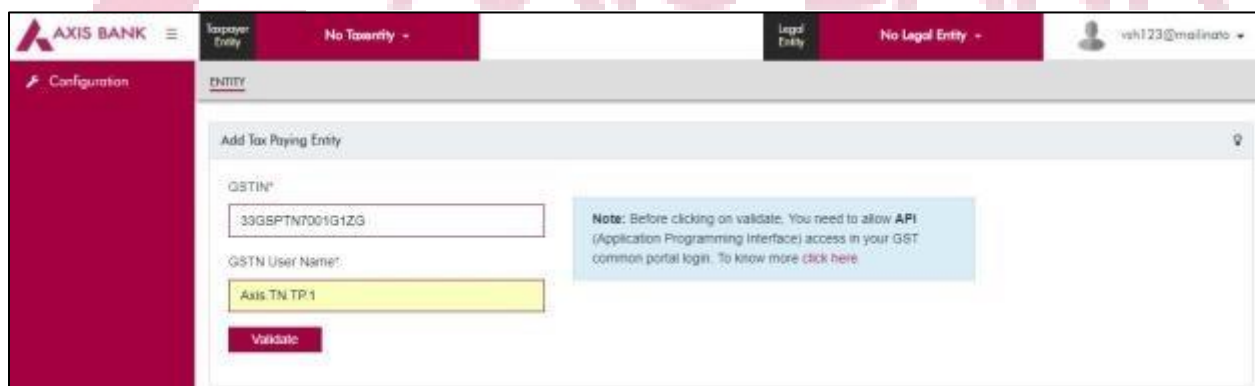


Figure 10: Add Legal Entity on first login (Part 2)

**Step 3.** If an error appears, it means that the GSTIN has not been entered correctly. In such a case, check the details entered, and try again

**Step 4.** Next, enter the entity details – Legal/ Tax Paying Entity, registration type, previous year aggregate turnover, etc. and click “Save”

### 3.2 Adding more GSTINs/ Entities

**Step 1.** To add more GSTINs/ Entities, go to the “Configuration” tab in the left pane

**Step 2.** Select “Entity” option from the top ribbon

**Step 3.** To add a legal entity, go to the “Legal Entity” tab and click on “Add Legal Entity”; To add a tax paying entity, go to the “Tax Paying Entity” tab and click on the “Add Tax Paying Entity” button

Figure 11: Adding additional entities

**Step 4.** Before attempting to add entities, please ensure that you have access to add new entities. If not, please approach your admin.

**Step 5.** Also, before validating the GSTIN details of the new entity please allow API access in your GST common portal login. This is to ensure that Axis GST Connect is able to access the GSTN portal with the user name assigned to a given GSTIN (For detailed process on allowing API access, refer to [Annexure - 3](#))

**Step 6.** Next, fill up the mandatory fields (marked with a red asterisk) and click “Save”

Figure 12: Entity Details

### 3.3 Users

All Axis GST Connect customers can currently have **only one** user for their login. The options for addition of more users will, however, be visible to the customer.

Post implementation of single-sign-on from Internet Banking, the option of having multiple users will be opened for all customers.

**Step 1.** To add, remove or modify a user’s access, go to the “Configuration” tab in the left pane and select “Users” option from the top ribbon

Name	Email	Action
Saumya Das	axisuser@mailinator.com	Role

Figure 13: List of users

**Step 2.** All the existing users will now be displayed on the screen. The “Action” column gives 3 access options for a user – Define a role, edit details or delete

**Step 3.** If there is only one user for the entities listed on the portal, then he/she becomes the “Admin” by default

**Step 4.** By clicking on “Role”, many options for the corresponding user appear. Select the role option desired for the said user corresponding to the desired Tax Paying Entity

Figure 14: Role assignment to user

**Step 5.** This menu will also help you observe the modifications in user’s history done for the corresponding legal/ tax paying entities

### 3.4 Item Masters

Item Masters is a master list prepared to contain details of all the items dealt by the entities i.e. all goods/ services and their details.

**Step 1.** In the “Configuration” menu, under the “Item Masters” tab, you can see the master list of items

Name	HSN/SAC	IGST Rate( % )	CGST Rate( % )	SGST Rate( % )	Item Type	SKU UOM	Sale Price (₹)	Purchase Price (₹)	Discount (%)	Actions
Nil rated Item		0.00	0.00	0.00	G	BAG				

Figure 15: Item Masters

**Step 2.** To add a new item, click on the button “Add Item” (Refer Screenshot above) and enter the required details for the item – Item name, GST Rates, etc.

Figure 16: Addition of Items in Items Master

**Step 3.** To add multiple items in the Item Master, click on “Import”. A pop-up will now appear with a link of “Download New Data Template”. Fill up this template with the details of the items you want to add and upload (Click on “Choose File”, select file containing details and click “Upload”).

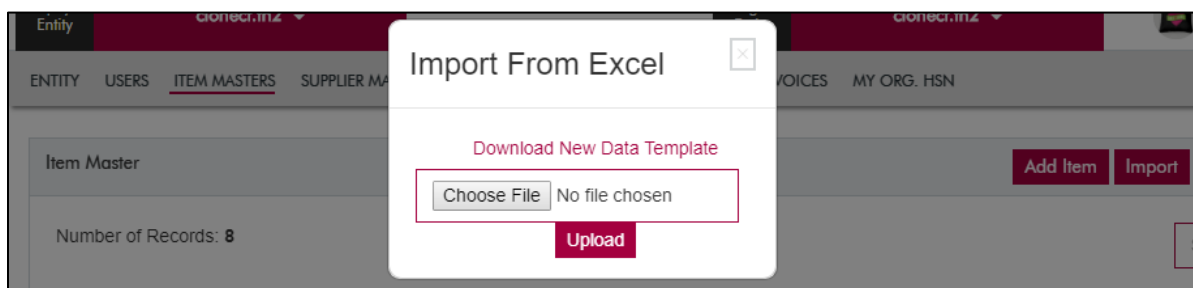


Figure 17: Importing multiple items

### 3.5 Supplier Masters

Supplier Masters is a master list prepared to contain details of all the suppliers/vendors of the entities.

**Step 1.** In the “Configuration” menu, under the “Supplier Masters” tab, you can see the master list of suppliers/ vendors.



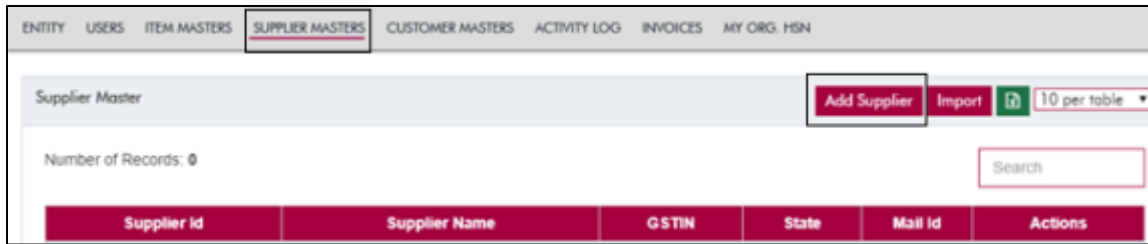


Figure 18: Supplier Masters

**Step 2.** To add a new supplier, click on the button “Add Supplier” (Refer Screenshot above) and enter the required details for the item – Supplier Name, State, etc.

Figure 19: Addition of Supplier in Supplier Masters

**Step 3.** To add multiple suppliers in the Supplier Master, click on “Import”. A pop-up will now appear with a link of “Download New Data Template”. Fill up this template with the details of the suppliers you want to add and upload (Click on “Choose File”, select file containing details and click “Upload”).

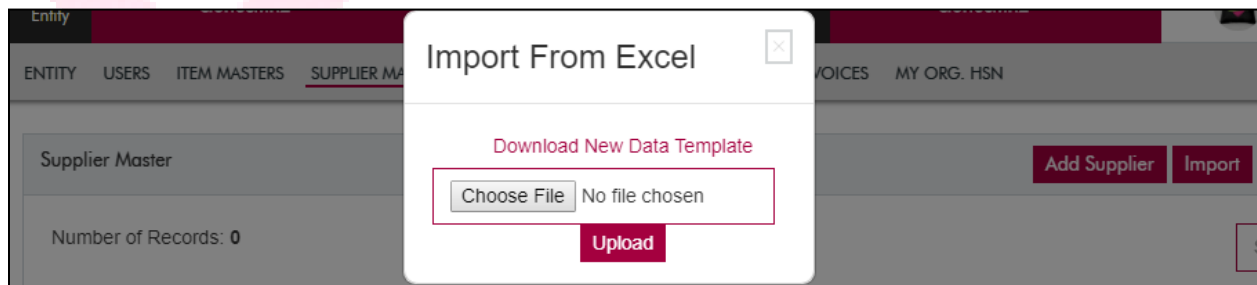


Figure 20: Importing multiple suppliers

### 3.6 Customer Masters

Customer Masters is a master list prepared to contain details of all the customers (GSTN registered/unregistered).

**Step 1.** In the “Configuration” menu, under the “Customer Masters” tab, you can see the master list of customers

Figure 21: Customer Masters

**Step 2.** To add a new customer, click on the button “Add Customer” (Refer Screenshot above) and enter the required details for the item – Customer Name, State, etc.

Figure 22: Addition of customer in customer masters

**Step 3.** To add multiple customers in the Customer Master, click on “Import”. A pop-up will now appear with a link of “Download New Data Template”. Fill up this template with the details of the customers you want to add and upload (Click on “Choose File”, select file containing details and click “Upload”).

Figure 23: Importing multiple customers

### 3.7 Activity Log

Activity Log contains a log of all the activities performed on the selected Legal & Tax Entity combination, along with the corresponding date & time of activity.

To view the Activity Log, select the relevant Legal & Tax Paying Entity from the top banner. Then, in the “Configuration” menu, select Activity Log. If you want to observe the activity log for a specific period, you can select the desired period from the options on the page (Highlighted in the screenshot).

Module	Activity Type	Change Description	User	Date and Time
Item Masters	Update	Item Master Update		23-Nov-2017 6:27:41PM

Figure 24: Activity Log

### 3.8 Invoices

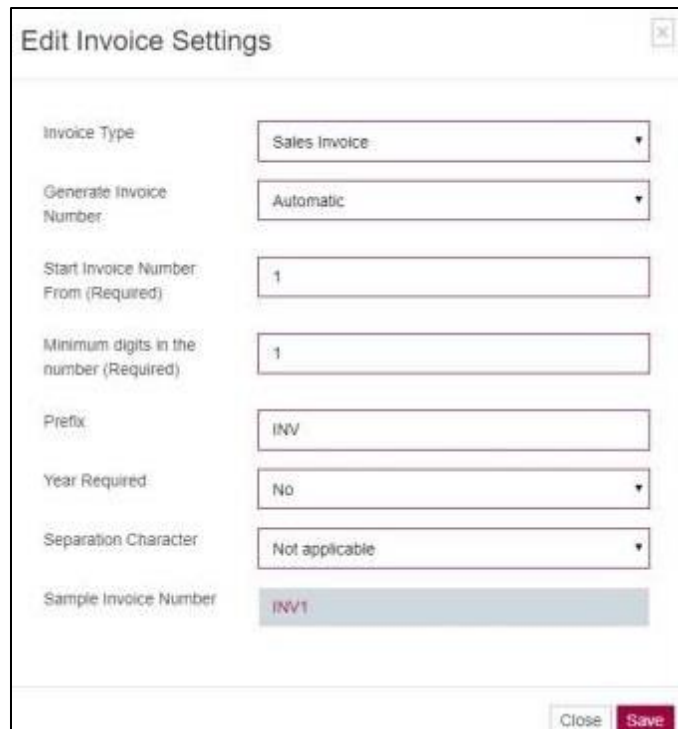
To prepare invoices through the GST Connect system, you can set the format of the invoice/credit/ debit note by going to the “Invoices” tab under the “Configuration” menu.

Figure 25: Setting format for invoices and credit & debit notes

**Step 1.** Update the number & formats of the invoices, as desired, by clicking on the button “Edit Settings”

Figure 26: Setting format for invoices and credit & debit notes (continued)

**Step 2.** In the menu, you can choose how to number your invoices/ notes, display of year, prefixes, etc. After making your selection, click on “Save”.



**Edit Invoice Settings**

Invoice Type	Sales Invoice
Generate Invoice Number	Automatic
Start Invoice Number From (Required)	1
Minimum digits in the number (Required)	1
Prefix	INV
Year Required	No
Separation Character	Not applicable
Sample Invoice Number	INV1

Close Save

Figure 27: Setting formats for invoices/ notes (continued)

**Step 3.** Next, you can even add a logo to your invoices and notes (debit/credit) by choosing the corresponding file and clicking “Upload”. Following this, you will be able to preview the logo.



Number & Format Logo

Logo

Choose File No file chosen upload

NO IMAGE

Figure 28: Adding logo to invoices/ notes

**Step 4.** The formats and logo for your invoices/ notes are ready

### 3.9 My Org HSN

MyOrg HSN gives an overview of the list of HSNs associated with the business entity. It provides a ready reference for HSNs of the traded Goods & Services. Goods & Services for which HSN codes are required can be added from the Utility tool.

Taxpayer Entity

AxisGSTConnect2

Legal Entity

AxisGSTConnect2

ENTITY

USERS

ITEM MASTERS

SUPPLIER MASTERS

CUSTOMER MASTERS

ACTIVITY LOG

INVOICES

MY ORG. HSN

BUSINESS

GSTIN

My HSN Master

Number of Records: 1

HSN Code	Section Name	Chapter Name	Description of Goods/Services	GST Rate	Industry
Any	Services	All Services	Services Provided By Way Of Pure Labour Contracts Of Construction, Erection, Commissioning, Installation, Completion, Fitting Out, Repair, Maintenance, Renovation, Or Alteration Of A Civil Structure Or Any Other Original Works Pertaining To The Beneficiary-Led Individual House Construction Or Enhancement Under The Housing For All (Urban) Mission Or Pradhan Mantri Awas Yojana	Nil	Real Estate Builders

### 3.10 Business

It will display the master list of all businesses (PANs) mapped to the user. Work on this section is currently in progress. Details on this section will be updated once the section is ready.

Taxpayer Entity	AxisGSTConned2 ▾	Legal Entity	AxisGSTConned2 ▾						
ENTITY	USERS	ITEM MASTERS	SUPPLIER MASTERS	CUSTOMER MASTERS	ACTIVITY LOG	INVOICES	MY ORG. HSN	BUSINESS	<u>GSTIN</u>

### 3.11 GSTIN Verification

Taxpayer Entity	AxisGSTConned2	Legal Entity	AxisGSTConned2						
ENTITY	USERS	ITEM MASTERS	SUPPLIER MASTERS	CUSTOMER MASTERS	ACTIVITY LOG	INVOICES	MY ORG. HSN	BUSINESS	GSTIN

#### Entity Verification

Legal Entity

Tax Paying Entity (TPE)

Add Tax Paying Entity

10 per table

Number of Records: 1

Search

#	Business Name	GSTIN	Legal Entity Name	Verification Status	Actions
1	ABC Ltd KA	29AATCR1111H1Z1	ABC Ltd	Pending	<div><div></div><div></div><div></div><div>Gstin Details</div></div>

Screen 5: Verification of the entity created and the username

After saving the user can verify the details of the entity created and can view, edit or delete the entity.

For one time verification of the user name assigned by GSTN portal, user has to Go to Configuration ->

Tax Paying Entity-> GSTIN Detail and then click on GSTIN details [Gstin Details](#) and verify the entered GSTIN user name.

[< Back](#)

GSTIN: 29AATCR1111H1Z1
TPE Name: ABC Ltd KA

GSTIN User Name:

Save & Verify

Screen 6: Verification of the username

Click on “Save & Verify” and an OTP will be received to the user’s mobile number / email and the OTP has to be entered.

GSTIN User Name:

user1

✓ Verified

Screen 7: post verification of username

The username will be marked as “Verified” and this will be a one-time requirement. The user can create any number of entities subject to all the process mentioned above.

**Step 5.** User may verify the Name, email and assign and edit role. With respect to deletion the same will not be feasible if there is only one user.

## 4. Dashboard

The dashboard, by the means of pie charts, shows a summary of outward & inward supplies, while giving a number of invoices (sales & purchase) received/ shared & rejected for a selected month.

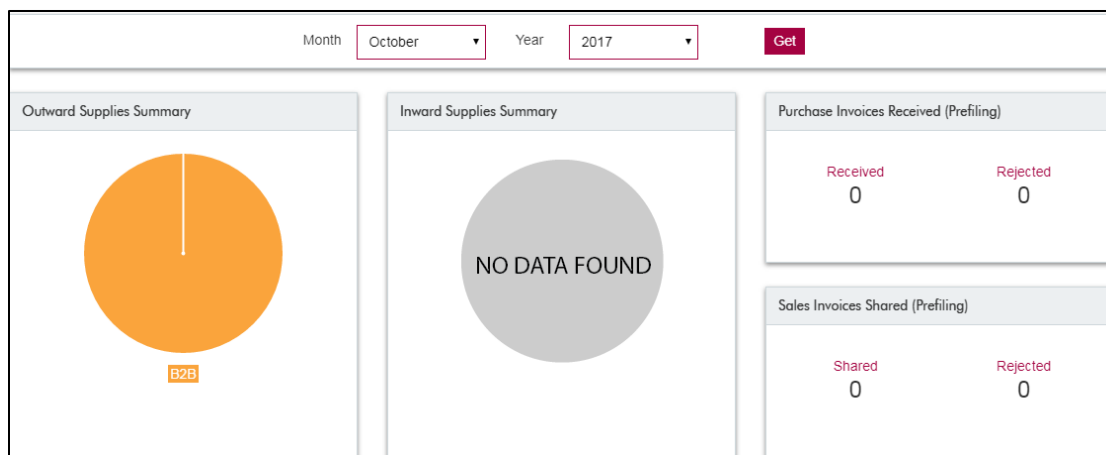


Figure 29: Dashboard

Additionally, on the dashboard, you can add a new tax paying entity/ legal entity. The same can be done by clicking the Configuration tab on the left pane (Refer [Section 2.1 Legal/ Tax Paying Entity](#))

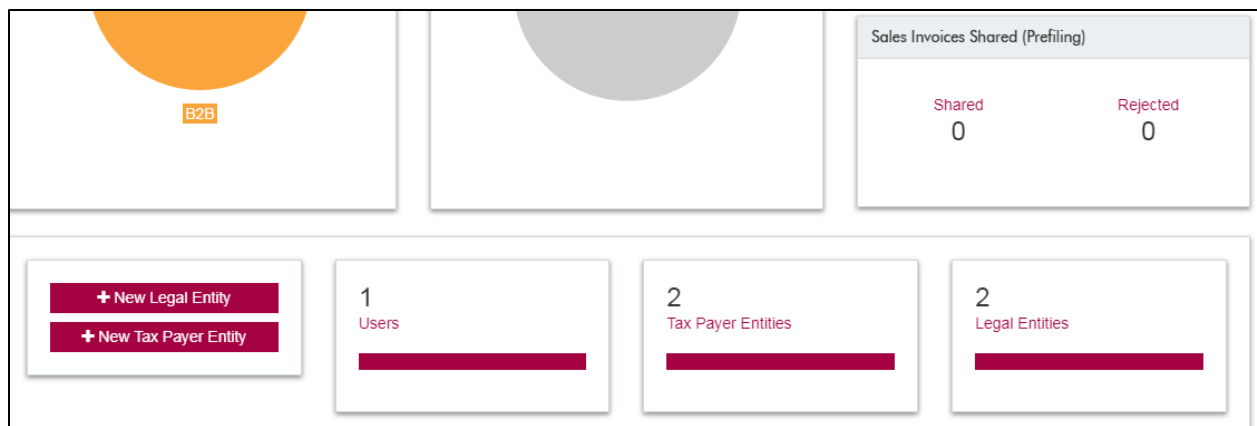


Figure 30: Dashboard (continued)



## 5. Invoices

### 5.1 Sales

A list of sales invoices, whether uploaded in the platform or issued through the platform can be viewed by selecting “Sales” option from the top ribbon under the “Invoices” tab on the left pane.

Status	Invoice Number	Invoice Date	Customer Name	Taxable Value (₹)	IGST (₹)	CGST (₹)	SGST (₹)	CESS (₹)	Total Value (₹)	T
Saved	INV3	16-Nov-2017	Customer Name 01	64,32,75,28,13,084.00	0.00	5,78,94,46,05,881.67	5,78,94,46,05,881.67	0.00	75,90,64,20,24,847.36	
Ready	INV2	16-Nov-2017	Customer Name 01	64,32,75,28,13,084.00	0.00	5,78,94,46,05,881.67	5,78,94,46,05,881.67	0.00	75,90,64,20,24,847.36	

Figure 31: List of Sales Invoices

The left column of the list of invoices mentions the status as “Saved” or “Ready”:

- A “Saved” invoice is an invoice that has been saved in the GST Connect system, but may not necessarily flow into the return. All the invoices uploaded on to the system qualify for the saved invoices.
- A “Ready” invoice is an invoice is ready to be used for preparation of the GST return or to be sent to be shared with the customer.

**Step 1.** To create invoices, click on the button “Add Invoice” (Refer screenshot above)

**Step 2.** Enter the invoice date and place of supply, along with item name, its price & quantity purchased. After filling, all the *required* details, click “Save”.

S#	Item	HSN	Price (₹)	Quantity	UoM	Discount (%)	Amt (₹)	Amt Taxable (₹)	CGST (%)	Amt (₹)	SGST (%)	Amt (₹)	Cess (% or Amt)	Amt (₹)	Total (₹)
			[A]	[B]		%	[C]	[D]	%	[E]	%	[F]	%	[G]	[D]+[E]+[F]+[G]
1	Steel	243534		0.000	KGS	0.00	0.00	0.00	9.000	0.00	9.000	0.00	0.00	0.00	0.00
Adjustments (₹) (+/-)														0.00	
Total (₹)														0.00	





Figure 32: Creating invoices



**Step 3.** To go back to the summary of invoices, click on the “< Back” button.

**Step 4.** To view/ edit/ delete existing invoices, click on the icon corresponding to them. For editing, a window similar to above will appear. Make the required changes and click “Save”.

**Step 5.** To export invoices created through above steps, click on the document icon above the invoices table.

Value (₹)	Y
2,53,035.36	   

## 5.2 Credit/Debit Notes

**Step 1.** To create invoices, click on the button “Add Credit/Debit Note”

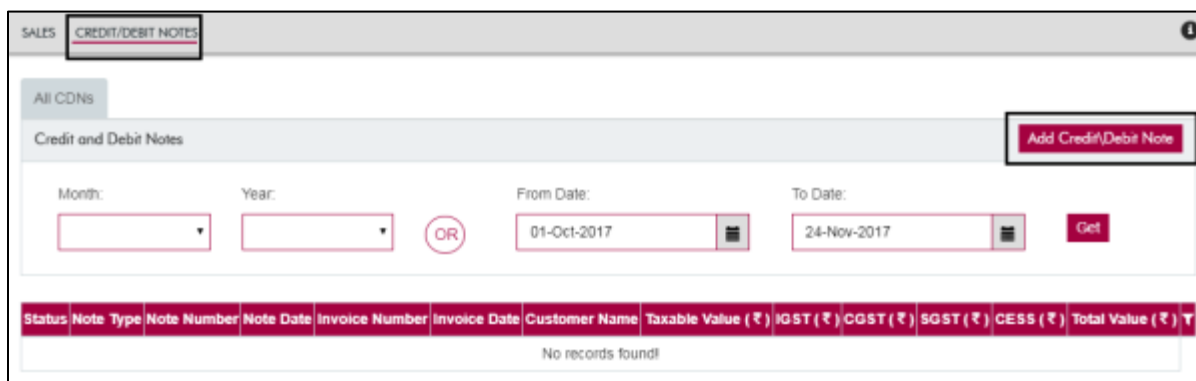


Figure 33: Creating Credit/Debit Notes

**Step 2.** Enter the invoice date and place of supply, along with item name, its price & quantity purchased. After filling, all the *required* details, click “Save”.

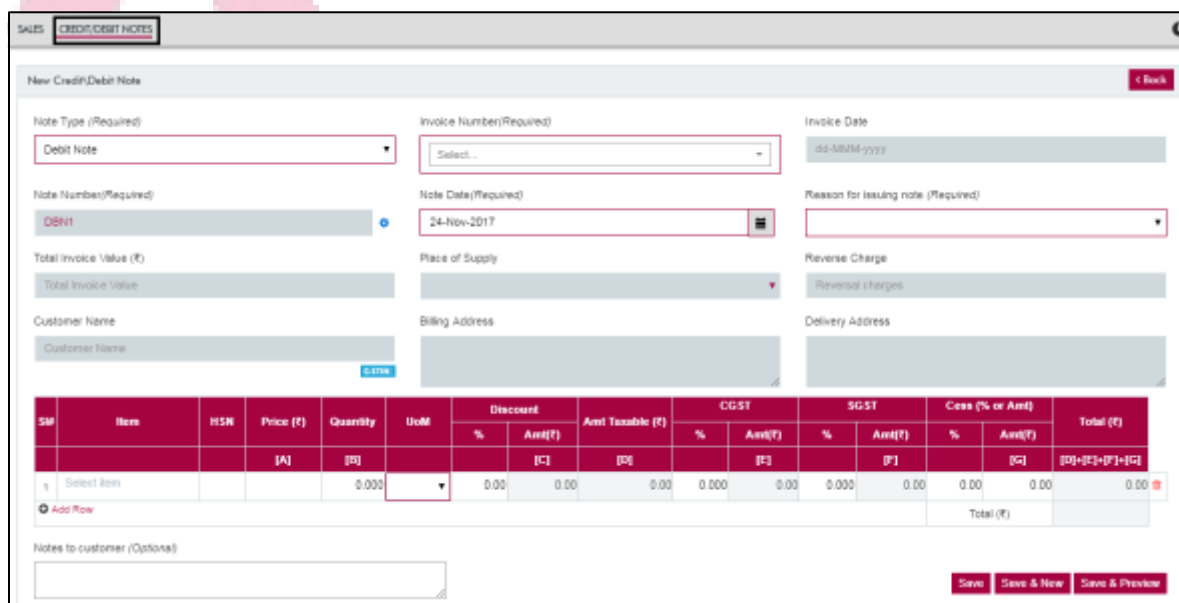


Figure 34: Creating Credit/Debit Notes (continued)

**Step 3.** To go back to the summary of notes, click on the “< Back” button.

**Step 4.** To view/ edit/ delete existing notes, click on the icon corresponding to them. For editing, a window similar to above will appear. Make the required changes and click “Save”.

**Step 5.** To export the notes created, click on the document icon above the summary of notes.

## 6. Outward Supplies

In this menu all outward supplies (sales) related entries can be made and maintained.

### 6.1 Summary

**Step 1.** User clicks on Summary and selects the month and year

**Step 2.** User clicks on Get to fetch the summary for the given period with options to view and edit

Section	Invoice Value (₹)	Taxable Value (₹)	IGST (₹)	CGST (₹)	SGST (₹)	CESS (₹)	Actions
---------	-------------------	-------------------	----------	----------	----------	----------	---------

Figure 35: Summary of Sales

### 6.2 Sales

**Step 1.** User clicks on Sales and selects the period (month and year /dates) to get sales entries

**Step 2.** Sales invoices for the relevant period are displayed in the table. Invoices with Status “N” are not saved to GSTN whereas invoices with Status “S” are saved to GSTN.

**Step 3.** User click on add Sales / Import for adding or import of sales transactions for a particular GSTIN and for the selected period.

Status	Category	Invoice Number	Invoice Date	Customer Name	Taxable Value (₹)	IGST (₹)	CGST (₹)	SGST (₹)	CESS (₹)	Total Value (₹)
--------	----------	----------------	--------------	---------------	-------------------	----------	----------	----------	----------	-----------------

Figure 36: Add or Import sales transactions

**Step 4.** User clicks on add sales and the following screen will appear:

**New Sales Data** < Back

Customer Name* <input type="text" value="Name"/>	Customer Type* <div>-- Customer Type --</div>	Customer GSTIN* <input type="text" value="Buyer TIN"/>	Place of Supply(State)* <div>-- State --</div>
<small>Add New Customer</small>			
Invoice Number* <input type="text" value="Invoice No."/>	Invoice Date* <input type="text" value="DD-MMM-YYYY"/>	Total Invoice Value (₹) <input type="text" value="Total Invoice Value"/>	Taxability Type* <div>-- Taxability Type --</div>

**Additional Details** +

Add New Item +

Item Details	Quantity	Taxable Amount (₹)	Taxes (₹)
Item Name* <input type="text" value="Item Name"/>	Quantity* <div>0.00</div>	Taxable Amount* <div></div>	CESS Amount* <div>0</div>
<div> <div>Item type* <div>-- Item Type --</div></div> <div>HSN/SAC : <input type="text"/></div> </div>	Unit of measurement :* <div>-- Unit of measurement --</div>		

Share Invoice Information ? ☐ Save & New Save

Figure 37: Add Sales

**Step 5.** User has to fill/select the relevant data and click on save

**Step 6.** The transaction will be saved for the given GSTIN (Tax Paying Entity) and the selected period.  
Here all the fields marked with red asterix (\*) are mandatory.

**Step 7.** For remaining/all of the invoices, user can also use Import function. When User clicks on import sales and the following screen will appear:

**SUMMARY** **SALES** CREDIT/DEBIT NOTES B2CS AGGREGATED ENTRIES ADVANCES NONTAXABLE AGGREGATE ENTRIES DOCUMENTS ISSUED DETAILS HSN SUMMARY

SAVE TO GSTN GSTN SUMMARY

**All Invoices** Invoices to be shared

**Outward Sales** Add Sales Import

Month: <div></div>	Year: <div></div>	OR	From Date: <input type="text" value="01-Oct-2017"/>	To Date: <input type="text" value="31-Oct-2017"/>	<div>Sales</div> <div>GSTN Template</div> <div style="background-color: #800040; color: white; padding: 2px 5px;">Get</div>
-----------------------	----------------------	----	--	--	---

■	Status	Category	Invoice Number	Invoice Date	Customer Name	Taxable Value (₹)	IGST (₹)	CGST (₹)	SGST (₹)	CESS (₹)	Total Value (₹)
---	--------	----------	----------------	--------------	---------------	-------------------	----------	----------	----------	----------	-----------------

Figure 38: Import Sales

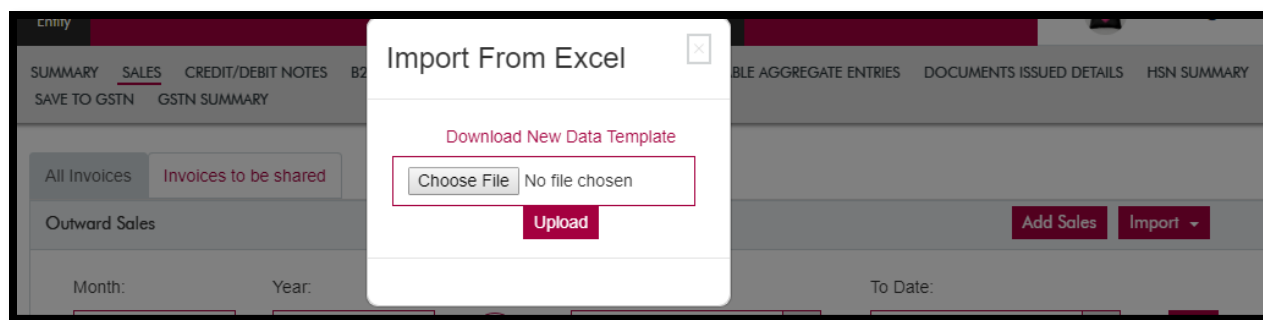


Figure 39: Import from Excel

**Step 8.** User selects the option of Sales. A new pop-up appears with the option to download a simplified Sales template. This excel template needs to be filled with relevant sales data and uploaded. Please refer to [Annexure – 4](#) to understand preparation of Outward Supplies import file (Sales data) as required by GSTN.

**Step 9.** User also has the option to select the import data as GSTN Template and download the template, fill data and upload the filled template after selecting the relevant month and year, and click on Submit.

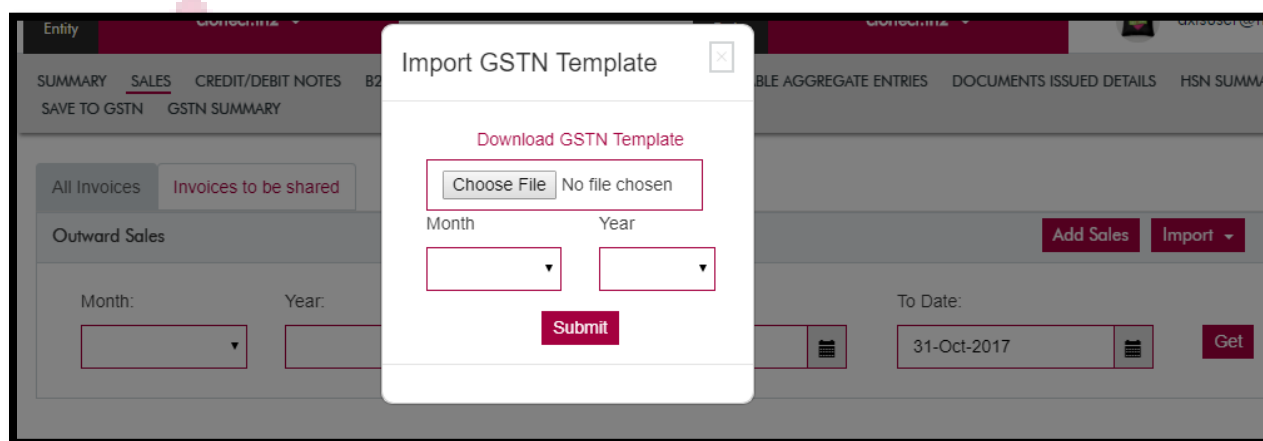


Figure 40: Import Sales data with GSTN Template

**Step 10.** Once user uploads the data using any of the options, the Sales data gets populated

Outward Sales

Add Sales Import

Month:

Year:

OR

From Date:

01-Oct-2017

To Date:

31-Oct-2017

Get

10 per table

Delete selected record

	Status	Category	Invoice Number	Invoice Date	Customer Name	Taxable Value (₹)	IGST (₹)	CGST (₹)	SGST (₹)	CESS (₹)	Total Value (₹)	T
	N	B2B	SAL40001	12-Oct-2017	ShrinivasQK	8,00,000.00	0.00	72,000.00	72,000.00	10.00	8,00,000.00	
	N	B2B	SAL40002	12-Oct-2017	ShrinivasQK	40,000.00	0.00	3,600.00	3,600.00	10.00	40,000.00	
	N	B2B	SAL40001	12-Oct-2017	ShrinivasQK	8,00,000.00	0.00	72,000.00	72,000.00	10.00	8,00,000.00	

Figure 41: Sales data for GSTR 1 filing

### 6.3 Credit/Debit Notes

User may add or import the Credit / Debit Note issued for the relevant month / period and maintains all the Credit / Debit note related information.

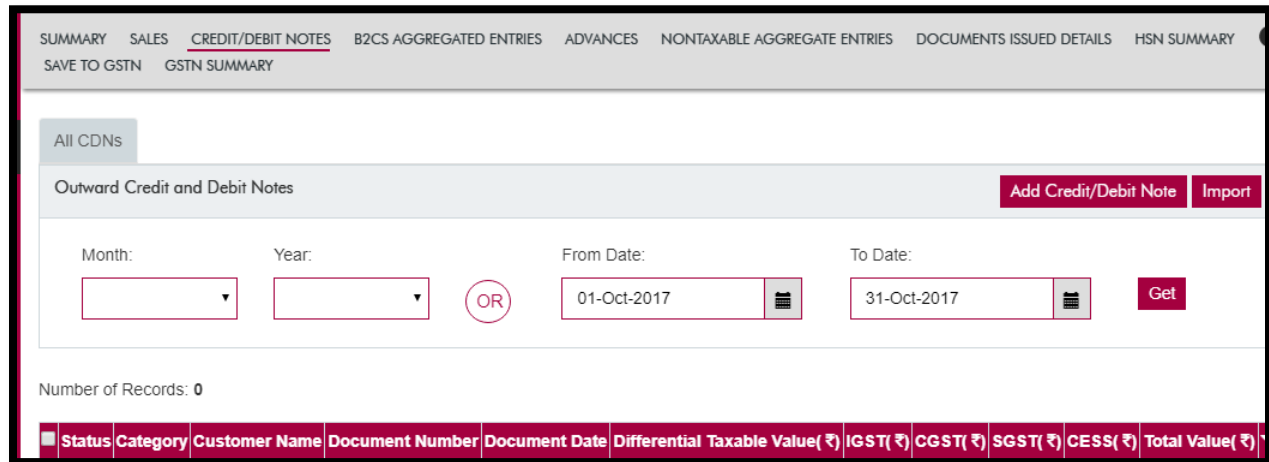


Figure 42: Add or Import & maintain Credit/Debit notes

**Step 1.** User may add the Credit/Debit by clicking on Add Credit/Debit note for the selected period by entering relevant details as stated in the below screen:

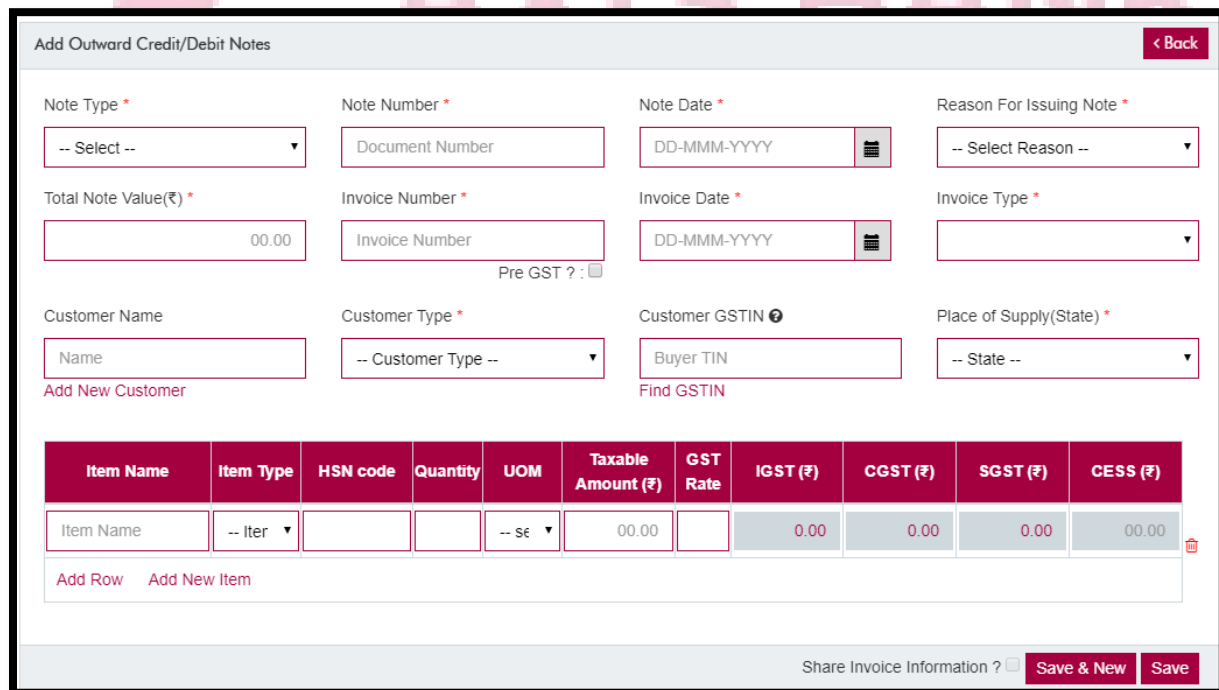


Figure 43: Add Credit / Debit Note

**Step 2.** User has to make sure that all the mandatory fields marked with red asterix (\*) are correctly filled

**Step 3.** Post entering the information in the above fields, Click on Save.

**Step 4.** For import of Credit/Debit notes, user clicks on import of Credit/Debit note and the below screen appears:

The screenshot shows the 'Import From Excel' dialog box in the Axis Bank GSTN system. The dialog box is titled 'Import From Excel' and contains a 'Download New Data Template' link, a 'Choose File' button, and an 'Upload' button. The background shows the 'CREDIT/DEBIT NOTES' section with filters for Month, Year, and To Date, and a table of records.

Figure 44: Import Credit/Debit note

**Step 5.** User has to download the template for Credit/Debit notes, fill it and upload the same.

**Step 6.** Details of Credit/Debit notes get saved for the selected period

## 6.4 B2CS Aggregated Entries

**Step 1.** User clicks on B2CS Aggregated Entries for the month to enter and maintain these entries for the selected period

The screenshot shows the 'B2CS AGGREGATED ENTRIES' section in the Axis Bank GSTN system. The section shows filters for Month and Year, and a table of records.

Figure 45: Maintaining B2CS Aggregated Entries

**Step 2.** User clicks on Add aggregate entry and enters / selects the data and clicks on save

**New B2CS Aggregate Entries** < Back

Month\*  Year\*  Place of Supply(State)\*  E-Commerce Operator GSTIN

---

Item Name\*  Taxable Value (₹)\*  Quantity\*  UOM\*

ITEM TYPE :  HSN/SAC :

IGST  CGST  SGST  CESS Amount (₹)

**Save & New** **Save**

Figure 46: Add B2CS Aggregated Entries and Save

## 6.5 Other Sub-Menus (Advances, Non-Taxable Aggregate Entries, Document Issued Details)

Similarly, user can fill all the sub-menus in the “Outward Supplies” main menu for preparation of data for filing GSTR 1.

## 6.6 Save to GSTN

**Step 1.** After filling all the details, user can click on “Save to GSTN”.

**Step 2.** User has to select the relevant month and year in the drop down and click on “GET”.

**Step 3.** All the relevant details will appear for the given period and user has to select the Category he/she chooses to submit to GSTN network

**Save to GSTN**

Month  Year  **Get** **Reset**

---

Summary of data to be saved in GSTN **Export to Json** **Save To GSTN**

Aggregate Turnover from April-2017 to June-2017:

#	Category	Total Invoice Value (₹)	Total Taxable Value (₹)	ISGT (₹)	CGST (₹)	SGST (₹)	CESS (₹)	View
<input type="checkbox"/>	B2B	0.00	0.00	0.00	0.00	0.00	0.00	
<input type="checkbox"/>	B2CL	0.00	0.00	0.00	0.00	0.00	0.00	
<input type="checkbox"/>	B2CS	0.00	0.00	0.00	0.00	0.00	0.00	
<input type="checkbox"/>	CDNR	0.00	0.00	0.00	0.00	0.00	0.00	

Figure 47: Save to GSTN

**Step 4.** After selecting the categories to be submitted, Click on “Save to GSTN”.

- Step 5.** An OTP will be received on the mobile number registered with the GSTN portal. This OTP needs to be entered for establishing connection with the GSTN network.
- Step 6.** On submitting the OTP, the data gets saved to GSTN network for filing of GSTR 1.
- Step 7.** In the rare case where the connectivity could not be established with GSTN network due to unforeseen circumstances the user may click on “Export to Json” option.
- Step 8.** A file in .json format will be auto downloaded into the download folder.
- Step 9.** The downloaded .json file may be uploaded into GSTN portal after login into the GSTN portal for the purpose of saving to GSTN.





## 7. Inward Supplies

In this menu all inward supplies (purchase) related entries can be made and maintained.

### 7.1 Summary

**Step 1.** User clicks on “Summary” and selects a month and year and clicks on “GET”

**Step 2.** On clicking GET, a table will be populated for the given period of all the purchases.

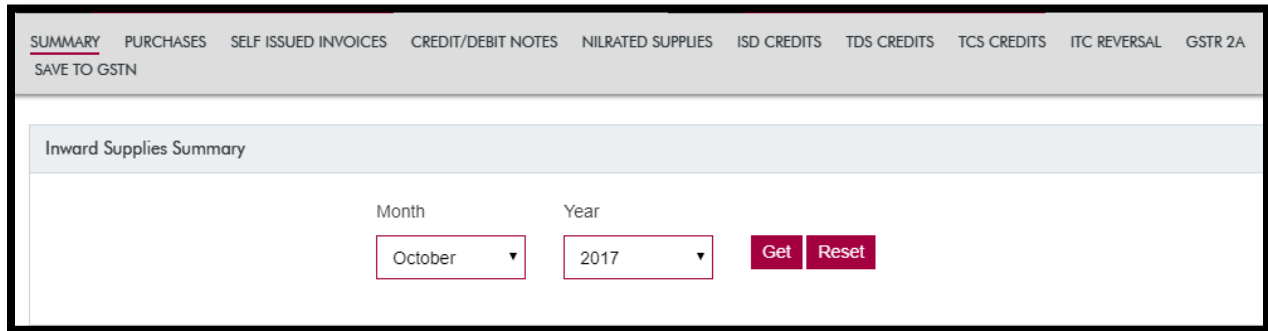


Figure 48: Summary of Inward Supplies (Purchases)

### 7.2 Purchases

**Step 1.** User clicks on “Purchases” and selects a month and year and clicks on “Get”

**Step 2.** On clicking “Get”, a table will be populated for the given period of all the purchases along with the status of invoices whether they are saved to GSTN or not.

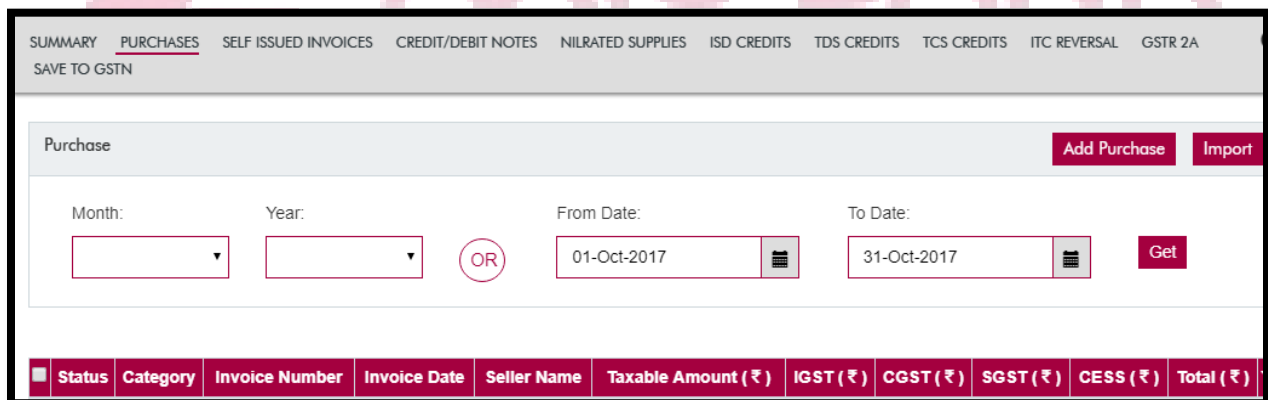


Figure 49: Add, Import or maintain purchases

**Step 3.** User clicks on “Add Purchase” then the below screen will appear:

**New Purchase Invoice** < Back

Supplier Invoice Number \*  Supplier Invoice Date \*  Supplier Invoice Value\*  Taxability Type \*

Supplier Name  Supplier Type \*  Supplier GSTIN  Supplier State \*

[Add New Supplier](#) [Find GSTIN](#)

Place of Supply (State) \*  ☐ Reverse Charge ? ☐ Import of Input/Capital goods ?

Item Name	Item Type	ITC Eligibility Type	HSN code	Quantity	UOM	Taxable Amount (₹)	GST Rate
<input type="text" value="Item Name"/>	<input type="text" value="-- Item Type --"/>	<input type="text" value="-- ITC Eligibility --"/>	<input type="text" value="HSN"/>	<input type="text" value="0.00"/>	<input type="text" value="-- Unit of m --"/>	<input type="text" value="00.00"/>	<input type="text" value="00.00"/>

[Add Row](#) [Add New Item](#)

[Save & New](#) [Save](#)

Figure 50: Add Purchases

- Step 4.** User has to enter/select the relevant values in the fields provided and click on Save. Mandatory fields are marked with red asterix (\*).
- Step 5.** User may also bulk import the purchase data by clicking on Import. The import function works similar to the import function in Outward Supplies.
- Step 6.** User can download the excel template, fill the data and upload the excel template with purchase data.

**Import From Excel**

[Download New Data Template](#)

No file chosen

Figure 51: Import Purchase Data

- Step 7.** Once user uploads the data using Add/Import option, the purchase data gets populated in the table.
- Step 8.** Purchase data is ready for submission to GST

### 7.3 Other Sub-Menus (Advances, Non-Taxable Aggregate Entries, Document Issued Details)

Similarly, user can fill all the sub-menus in the “Inward Supplies” main menu for preparation of data for filing GSTR 2.

## 7.4 Save to GSTN

**Step 1.** After filling all the purchase details, user can click on “Save to GSTN”.

**Step 2.** User has to select the relevant month and year in the drop down and click on “GET”.

**Step 3.** All the relevant details will be auto-populated for the given period and user has to select the Category which needs to be submitted to GSTN network

The screenshot shows the 'Save to GSTN' interface. At the top, there is a navigation bar with links: SUMMARY, PURCHASES, SELF ISSUED INVOICES, CREDIT/DEBIT NOTES, NILRATED SUPPLIES, ISD CREDITS, TDS CREDITS, TCS CREDITS, ITC REVERSAL, and GSTR 2A. Below this, the 'SAVE TO GSTN' section is active. It features a form with 'Month' (November) and 'Year' (2017) dropdowns, and 'Get' and 'Reset' buttons. Below the form, a 'Summary of data to be saved in GSTN' section shows 'Aggregate Turnover from April-2017 to June-2017: 1000000.01'. To the right of this summary are 'Export to Json' and 'Save To GSTN' buttons. Below the summary is a table with the following data:

#	Category	Total Invoice Value (₹)	IGST (₹)	CGST (₹)	SGST (₹)	CESS (₹)	View
<input type="checkbox"/>	B2B	0.00	0.00	0.00	0.00	0.00	
<input type="checkbox"/>	IMPG	0.00	0.00	0.00	0.00	0.00	
<input type="checkbox"/>	B2BUR	0.00	0.00	0.00	0.00	0.00	
<input type="checkbox"/>	CDNR	0.00	0.00	0.00	0.00	0.00	
<input type="checkbox"/>	CDNUR	0.00	0.00	0.00	0.00	0.00	
<input type="checkbox"/>	NIL	0.00	0.00	0.00	0.00	0.00	
<input type="checkbox"/>	IMPS	0.00	0.00	0.00	0.00	0.00	
<input type="checkbox"/>	HSN	0.00	0.00	0.00	0.00	0.00	

Figure 52: Save Purchase Data to GSTN

**Step 4.** After selecting the categories to be submitted, Click on “Save to GSTN”.

**Step 5.** An OTP will be received on the mobile number registered with the GSTN portal. This OTP needs to be entered for establishing connection with the GSTN network.

**Step 6.** On submitting the OTP, the data gets saved to GSTN network for filing of GSTR 2.

**Step 7.** In the rare case where the connectivity could not be established with GSTN network due to unforeseen circumstances the user may click on “Export to Json” option.

**Step 8.** A file in .json format will be auto downloaded into the download folder.

**Step 9.** The downloaded .json file may be uploaded into GSTN portal after login into the GSTN portal for the purpose of saving to GSTN.

## 8. Amendments

APIs for Amendments of GST Returns are not released by the GSTN. Accordingly, work on this section is currently in progress. Details on this section will be updated once the APIs are released.



## 9. Reconciliation

Reconciliation tab helps us reconcile the GST returns with customers/ suppliers, and shows details of the same. To view a summary of reconciliation go to the “Summary” tab, while to perform reconciliation go to the “Reconcile” tab.

### 9.1 Summary

The summary tab shows the reconciliation status, by components, of the GST return for the legal entity-tax paying entity combination. The reconciliation of notes is also listed here.

It displays the mismatches, wherever applicable, along with their final details including:

- Invoice type & value
- Date & Place of supply
- Reverse charges
- Item details

### 9.2 Reconcile

The summary tab shows the reconciliation status, by components, of the GST return for the legal entity-tax paying entity combination. The reconciliation of notes is also listed here.

It displays the mismatches, wherever applicable, along with their final details including:

**GSTR 2A**

**Summary** **Reconcile**

**Selection Criteria**

Legal Entity: AxisGSTConnect2  
Tax Paying Entity: 33GSPTN7002G1ZF-AxisGST...  
Month: October  
Year: 2017  
Type: B2B  
Counterparty filing status: Both  
Mismatch Type: Select  
Action taken: Select

**Get**

Number of records: 0 100 per table

SI#	My GSTIN	Supplier GSTIN	Invoice No	Details as per purchase register			Details as per GSTR-2A			Action taken
				Date	Invoice Value (₹)	Tax Amt (₹)	Date	Invoice Value (₹)	Tax Amt (₹)	
No records found!										

Figure 353: Reconciliation

## 10. Returns

The returns menu allows the users to create & submit their GST returns, and also to view the returns filed so far.

### 10.1 Summary

The summary tab lists all the returns filed so far and their current status, along with their acknowledgement number.

The screenshot shows the 'Returns' section of the Axis Bank GST portal. On the left is a navigation menu with options: Dashboard, Invoices, Outward Supplies, Inward Supplies, Amendments, Reconciliation, Returns (highlighted), and Ledgers. The main area has a sub-header 'Form GSTR-1' and filters for 'Month' (set to November) and 'Year' (set to 2017), with 'Get' and 'Reset' buttons. Below this is a table with columns: GSTIN, Period, Status, and Acknowledgement Number.

Figure 364: Returns Summary

### 10.2 GSTR-1

To prepare GSTR-1, select the “GSTR-1” option from the top ribbon in the “Returns” tab on the left pane.

**Step 1.** Save all the sales invoices to GSTN. To do so, click on the “click here” link on the page.

The screenshot shows the 'GSTR 1: Outward Supplies Return' page. The left navigation menu is the same as in Figure 364, with 'Returns' highlighted. The main area has a sub-header 'GSTR 1: Outward Supplies Return' and a progress bar with four steps: 1. Saving all invoices to GSTN (active), 2. Get GSTR-1 Summary, 3. Submit GSTR-1 Summary, and 4. Sign & File GSTR-1. Below the progress bar, under 'Step 1: Saving all invoices to GSTN', there is a message: 'If you haven't saved all invoices to GSTN' followed by a 'click here' link.

Figure 55: Saving invoices to GSTN for GSTR-1

**Step 2.** Next, select the month for which summary of data has to be repopulated and then click “Get”.

Figure 56: Saving invoices to GSTN for GSTR-1 (continued)

**Step 3.** Once the data gets prepared, click on “Save to GSTN” to trigger the API call. Alternatively, you can export the prepared data to a JSON file that can be used as a direct input in GSTN Filing Portal (Refer Screenshot above).

### 10.3 GSTR-2

**Step 1.** After preparation of GSTR-1, prepare “GSTR-2” under the “Returns” tab of the left pane.

**Step 2.** Select the month for which the return is to be prepared and then click “Get” to obtain the corresponding details.

Figure 57: Review & Submit GSTR-2

**Step 3.** After reviewing all details, click “Next Step”.

Figure 58: Review & Submit GSTR-2 (continued)

**Step 4.** E-sign the return and submit. If the e-sign through Aadhaar OTP or DSC for the entity are not registered, please register the same by logging on to Government's GSTN portal.

Figure 59: E-sign and submit GSTR-2

## 10.4 GSTR-3B

**Step 1.** To prepare and file GSTR 3B, click on “GSTR-3B” under the “Returns” tab of the left pane.

**Step 2.** Click on “Prepare GSTR-3B” for return preparation using invoices uploaded under Inward and Outward supplies

**Step 3.** Select the month for which the return is to be prepared and then click “Get” to obtain the corresponding details.

Nature of Supplies	Taxable value (₹)	Integrated Tax (₹)	Central Tax (₹)	State/UT Tax (₹)	Cess (₹)
(a) Outward taxable supplies (other than zero rated, nil rated and exempted)	1640000	0	147600	147600	30

Figure 37: Prepare GSTR-3B

**Step 4.** Next, in order to sync any other invoices (if applicable) click on the button “Calculate”.

**Step 5.** To save your work on GST Connect, click on the button “Validate and Save”. To save the prepared data on GSTN, click on “Save to GSTN”

**Step 6.** Next, to file GSTR-3B, go to the tab “Get & File GSTR-3B”. To verify and file GSTR-3B, select the corresponding month from the drop-down and click “Get”.



Prepare GSTR3B

Get & File GSTR3B

Month

Year

October

2017

Get

Reset

Name of Tax Payer: ( **Name of Tax Payer** )
GSTIN:
Return Status: \_\_\_\_

1.Details of Outward Supplies and inward supplies liable to reverse charge

Nature of Supplies	Total Taxable value (₹)	Integrated Tax (₹)	Central Tax (₹)	State/UT Tax (₹)	Cess (₹)
1.1 Outward taxable supplies (other than zero rated, nil rated and exempted)					
1.2 Outward taxable supplies (zero rated )					
1.3 Other outward supplies (Nil rated, exempted)					
1.4 Inward supplies (liable to reverse charge)					
1.5 Non-GST outward supplies					

2. 1 Of the supplies shown in 1.1 above, details of inter-State supplies made to unregistered persons, composition taxable persons and UIN holders

2.1 Supplies made to Unregistered Persons

S.No.	Place of Supply (State/UT)	Total Taxable value (₹)	Amount of Integrated Tax (₹)
-------	----------------------------	-------------------------	------------------------------

2.2 Supplies made to Composition Taxable Persons

**Step 7.** If all the details in the return prepared are correct, e-sign the return and submit.

**Step 8.** On clicking “Submit”, an OTP will be generated. Enter the OTP as required.

**Step 9.** If the e-sign/DSC details are not updated, then go to Configuration and link the e-sign/DSC as registered with GSTN portal

## 11. Ledgers

Work on this section is currently in progress. Details on this section will be updated once the section is ready.

## 12. Reports and Analytics

Work on this section is currently in progress. Details on this section will be updated once the section is ready.

## 13. Utility Tools

### 13.1 HSN/SAC Finder

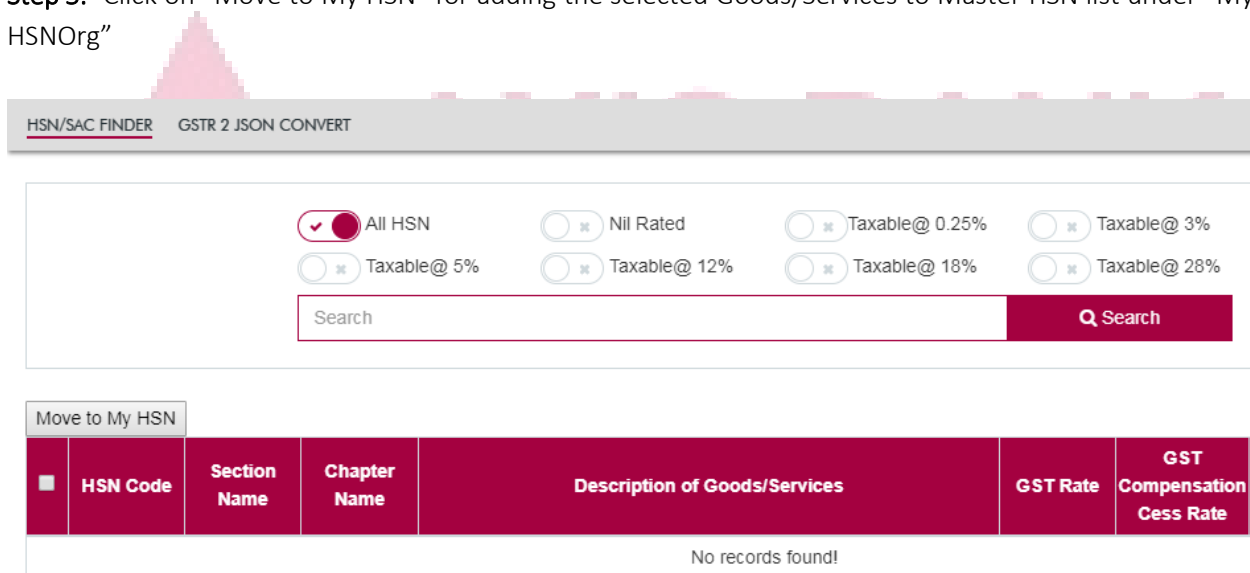
**Step 1.** Click on HSN/SAC Finder tab

**Step 2.** Select “All HSN” or any of the available taxable slabs

**Step 3.** Search for the Goods or Services related to the business (GSTIN/PAN) in the “Search” field

**Step 4.** Select the relevant Goods/Services from the search results

**Step 5.** Click on “Move to My HSN” for adding the selected Goods/Services to Master HSN list under “My HSNOrg”



The screenshot shows the 'HSN/SAC FINDER' tab selected in a navigation bar. Below the bar, there are several toggle switches for selecting HSN categories: 'All HSN' (checked), 'Nil Rated', 'Taxable@ 0.25%', 'Taxable@ 3%', 'Taxable@ 5%', 'Taxable@ 12%', 'Taxable@ 18%', and 'Taxable@ 28%'. A search input field with a 'Search' button is present. Below the search field, there is a 'Move to My HSN' button. A table with the following columns is shown: 'HSN Code', 'Section Name', 'Chapter Name', 'Description of Goods/Services', 'GST Rate', and 'GST Compensation Cess Rate'. The table currently displays 'No records found!'.

HSN Code	Section Name	Chapter Name	Description of Goods/Services	GST Rate	GST Compensation Cess Rate
No records found!					

**Disclaimer:** The above rates and HSNs may not be complete or exhaustive. For list of items under exemptions or attracting concessional rates and information available on the [CBEC website](#) may please be referred to. While every effort has been made to keep the information cited in this utility error take the responsibility for any typographical or clerical error which may have crept in while compiling the information.

### 13.2 GSTR 2 JSON Convert

Work on this section is currently in progress. Details on this section will be updated once the section is ready.

## Annexure 1 - Abbreviations

GSTIN	Goods and Services Taxpayer Identification Number
GSTN	Goods and Services Tax Network
TPE	Tax Paying Entity
API	Application Programming Interface
PAN	Permanent Account Number
CAPTCHA	Completely Automated Public Turing test to tell Computers and Humans Apart
ID	Identification
OTP	One Time Password



## Annexure 2 – GST Return Filing Dates

### **GSTR 1 Due Dates**

#### **For turnover up to Rs. 1.5 Cr**

<b>Period (Quarterly)</b>	<b>Due Dates</b>
Jul-Sep, 2017	31 <sup>st</sup> Dec, 2017
Oct-Dec, 2017	15 <sup>th</sup> Feb, 2018
Jan-Mar, 2018	30 <sup>th</sup> Apr, 2018

#### **For turnover more than Rs. 1.5 Cr**

<b>Period</b>	<b>Due Dates</b>
Jul-Oct, 2017	31 <sup>st</sup> Dec, 2017
Nov, 2017	10 <sup>th</sup> Jan, 2018
Dec, 2017	10 <sup>th</sup> Feb, 2018
Jan, 2018	10 <sup>th</sup> Mar, 2018
Feb, 2018	10 <sup>th</sup> Apr, 2018
Mar, 2018	10 <sup>th</sup> May, 2018

### **GSTR 3B Due Dates**

<b>Month</b>	<b>Due Dates</b>
Aug, 2017	20 <sup>th</sup> Sep, 2017
Sep, 2017	20 <sup>th</sup> Oct, 2017
Oct, 2017	20 <sup>th</sup> Nov, 2017
Nov, 2017	20 <sup>th</sup> Dec, 2017
Dec, 2017	20 <sup>th</sup> Jan, 2018
Jan, 2018	20 <sup>th</sup> Feb, 2018
Feb, 2018	20 <sup>th</sup> Mar, 2018
Mar, 2018	20 <sup>th</sup> Apr, 2018

Note: Tax liability of GSTR-3B must be paid by the last date of filing for that month.

### **GSTR 2 & GSTR 3 Filing Dates**

Timelines for filing of GSTR-2 and GSTR-3 for July to March 2018 will be worked out by Committee of Officers. However, subsequent month filing of GSTR-1 will not be impacted.

### **Other GSTR Filing Extensions (as on 13<sup>th</sup> Nov, 2017)**

<b>Return</b>	<b>Revised Due Date</b>
GSTR-5 (for Non-Resident)	15 <sup>th</sup> Dec, 2017
GSTR-4 (for Composition Dealers)	24 <sup>th</sup> Dec, 2017
GSTR-6 (for Input Service Distributor)	31 <sup>st</sup> Dec, 2017

## Annexure 3 – Allowing API Access to GST Connect

**Step 1.** Login to GSTN Common portal <https://services.gst.gov.in/services/login>

### Login

• indicates mandatory fields

Username •

Enter Username

Password •

Enter Password

LOGIN

[Forgot Username](#)

[Forgot Password](#)

**First time login:** If you are logging in for the first time, click [here](#) to log in.

**Step 2.** Click on “View Profile” on the right side of the home screen on GSTN dashboard

Dashboard

Last logged in on 19/08/2017 17:01

Currently logged in from IP: 103.87.129.201

Welcome [REDACTED] PRIVATE LIMITED to GST Common Portal

You can navigate to your chosen page through navigation panel given below

[RETURN DASHBOARD >](#) [CREATE CHALLAN >](#) [VIEW NOTICE\(S\) AND ORDER\(S\) >](#)

**View Profile**

**Quick Links**

- Check Cash Balance
- Liability ledger
- Credit ledger

**Step 3.** On left side, under “Quick Links”, click on “Manage API Access”

**Quick Links**

- [Change Password](#)
- [Manage API Access](#)
- [Register / Update DSC](#)
- [Application to Opt for composition Scheme Amendment](#)
- [Stock intimation for opting Composition Scheme](#)

Profile	Place of Business	Contacts	Other Business
GSTIN/UIN [REDACTED]	Legal Name of Business [REDACTED] OPERATIONS PRIVATE LIMITED	Centre Jurisdiction NA	
State Jurisdiction LVO 055 A - BENGALURU	Date of registration 01/07/2017	Constitution of Business Private Limited Company	
Taxpayer Type Regular	GSTIN / UIN Status Active pending Verification	Compliance Rating NA	
Name of the Proprietor / Director(s) / Promoter(s) ^			
Nature of Business Activities ^			

**Step 4.** On clicking “Manage API Access”, the following screen appears:

• indicates mandatory fields

Manage API Access

Enable API Request ☐ Yes ☒ No

ⓘ Select "Yes" or "No" to enable or disable API access for your GSTIN/UIN/GSTPID

**CONFIRM**

**Step 5.** Switch the radio button to “Yes” to enable API access

**Step 6.** Select the duration for which API access needs to be enabled. Click on “Confirm”

Manage API Access

Enable API Request ☒ Yes ☐ No

ⓘ Select "Yes" or "No" to enable or disable API access for your GSTIN/UIN/GSTPID

Duration •

Select

6 hrs

12 hrs

7 days

30 days

session will be active during this duration.After this duration you have to initiate a new session by

**CONFIRM**



## Annexure 4 – Preparing Import File (Outward Supplies)

Instruction for Preparing Excel Template for GSTR-01 (Sales Invoices)				
Data Fields	Description	Mandatory	Instructions	Acceptable/ Sample Values
<b>Supplier_GSTIN</b>	GSTIN of the Entity for which Sales record belongs to.	Mandatory in all cases	Enter the GSTIN of the Taxpaying entity to which the Sales records belongs	15 Digit Valid GSTIN
<b>Invoice_Number</b>	Sales Invoice Serial Number	Mandatory in all cases	a)Enter sales Invoice number (Maximum length 16 Characters). b)It can be alphanumeric c)Only two special characters "-" and "/" are allowed	Example: INV/2017- JUL/123
<b>Invoice_Date</b>	Sales Invoice date	Mandatory in all cases	a) Enter the date in dd-mmm-yyyy format. E.g.: 01-Jul-2017. b) Future date will not be acceptable. c) Can be left blank in case Bill of entry is entered	Example: 15-Jul-2017
<b>Customer_Type</b>	Customer Type whether Registered, Unregistered, Composite Taxable Person or UIN Holder	Mandatory in all cases	Select from dropdown	Registered Customer
<b>GSTIN_of_Customer</b>	GSTIN/UIN of the Customer	Mandatory only if customer is registered	a) GSTIN of the Customer if the Customer is registered under GST. b)Can be left blank for unregistered Customers	Example: 29ABCDR1234 M1Z2
<b>Place_of_Supply</b>	Place of supply state	Mandatory in all cases	Select the place of supply state determined based on the provisions of IGST Act	
<b>Total_Invoice_Value</b>	Total Value of the Invoice	Mandatory in all cases	a) Round off the amount up to 2 decimals b) It shall be same for all line items of a particular invoice	

<b>Taxability_Type</b>	Select whether Regular GST Supplies or Nil Rated Supplies or Exempted Supplies or Non GST Supplies	Mandatory in all cases		
<b>Item_Type</b>	Goods or Services	Mandatory in all cases	Select whether the Item is Goods or services	Goods or Services
<b>Item_Name</b>	Name of the Item	Mandatory in all cases	Do not duplicate the Item name in same invoice	
<b>HSN/SAC</b>	HSN Code of the Item	Not Mandatory	<p>a) Enter the HSN code of the item as specified in Item Master, if you choose to validate with Master Data.</p> <p>b) It is mandatory to report HSN code at two digits level for taxpayers having annual turnover in the preceding year above Rs. 1.50 Cr but up to Rs. 5.00 Cr and at four digits level for taxpayers having annual turnover above Rs. 5.00 Cr</p>	
<b>Quantity</b>	Number of units	Mandatory in all cases	<p>a) Enter the quantity against each line item</p> <p>b) Round off the quantity up to 2 decimals</p>	
<b>Unit_of_Measurement</b>	Unit of Measurement of the item	Mandatory in all cases	a) Select the unit of measurement of the item as specified in Item master	Drop Down



<b>Taxable_Value_of_the_item</b>	Gross taxable value of the item	Mandatory in all cases	a) Enter the Gross taxable value of the item.(Gross value excluding taxes) b) Round off the amount up to 2 decimals	
<b>GST_Rate</b>	GST rate	Mandatory in all cases	Enter the GST Tax rate applicable for the line item.	
<b>CESS_Amount</b>	CESS amount calculated at line item level	Mandatory in all cases	a) Enter the Cess amount for the line item. b) Can enter "0" if cess is not applicable c) Round off the amount up to 2 decimals	
<b>Export_Type</b>	Export Type - whether a) Deemed Export with pay b) Deemed Export without pay c) Export to SEZ With Pay d) Export to SEZ Without Pay e) Export to Outside India with Pay f) Export to Outside India without Pay	Mandatory in case of Export	Select the appropriate Export type from the dropdown	Drop Down
<b>Shipping_Bil_No.</b>	Shipping bill number in case of exports	Not Mandatory	Enter Shipping bill no in case of exports	
<b>Port_Code</b>	Port Code in case of exports	Not Mandatory	Enter Port Code no in case of exports	
<b>Shipping_Bill_Date</b>	Shipping Bill Date in case of exports	Not Mandatory	Enter Shipping Bill Date in case of exports	
<b>Reverse_Charge_applicability</b>	If Reverse charge is applicable against the sales invoice raised.	Not Mandatory	Select if 'Yes' if reverse charge is applicable against the Sales invoice.	

Ecom_Operator_GSTIN	if selling through E-Commerce operators, E-commerce operator GSTIN is required.	Not Mandatory	Enter E-commerce operator GSTIN if it is applicable.	
Share_Invoice-with_customer	if user wants to share the invoice details with customer.	Not Mandatory	Select 'Yes' if user wants to share the invoice details with customer.	

**General Instructions:**

- All the fields in red color are mandatory.
- If an Invoice has multiple Items, then enter same Invoice details(invoice number, date, Customer name, GSTIN, Place of supply state, total Invoice value) for all the Items in that invoice.
- Export Details and reverse charge applicability need to be entered only when they are applicable.
- Select value from drop down wherever available.
- Do not enter any amount with Negative or minus (-) sign.
- Do not enter % or any other symbol for amount and rate column.
- Do not enter comma (,) separated values in any amount field.
- It is recommended to validate the sheet before proceeding to upload into GST Connect so that basic checks are done and data is clean
- Do not alter the column headings in the template.