

E-WAY BILL – ZOHO FINALS- Anandakrishnan- work details

Sidebar contain 'E-way Bill' tab, if we click on 'E-way Bill' it redirects to the list out page, which contain list of e-way bills transactions and their details. If we click on to the '+' then it opens to a create e-way bill page, where we can create a new e-way bill.

E-WAY BILL LIST OUT:

'All E-way Bills' page displays all e-way bills transactions. In this page,

- **Import** new e-way details from other sources and **Export** e-way bills details to Excel
- A **search box** to filter the e-way details while typing any e-way bill related details, like date, transaction, customer name, or total amount.
- **Sort** - Sort out the e-way bills details in ascending order based on customer name and transactions.
 - **All**
 - **Name** – Customer Name
 - **E-way Bill Number**
- **NEW** – New button to open create page to add new e-way bill.
- Below that have a table to list out the details of all e-way bills. The table contain,
 - **DATE**– E-way bill date
 - **TRANSACTIONS** – Transaction Number
 - **E-WAY BILL NUMBER**
 - **CUSTOMER NAME**
 - **CUSTOMER EMAIL**
 - **AMOUNT** – E-way bill total amount

CREATE E-WAY BILL:

We can create e-way bill in three different pages in Zoho. From the sidebar by clicking '+', from the 'E-Way Bills' page by clicking 'NEW' or from the overview page has a button 'NEW' to create new e-way bill.

In 'New E-way Bill' page

- **Document Type*** - List to select the type of e-way bill document. This includes,
 - **Invoices**
 - **Credit Notes**
 - **Delivery Challans**
- **Transaction Sub Type* - *** - List to select the type of e-way bill transaction, which includes,
 - **Supply**
 - **Export**
 - **SKD/CKD**
- **Customer Name*** – Show the list of all customer from customer's table based on the company and customer status is 'Active'. We can type and search customer name in the dropdown to filter out the customer.
- By clicking '+' we can create new customer and list out in the customer dropdown dynamically.
- If we select a customer from the dropdown, display following fields with information automatically.
 - **Customer Email ID** – Selected customer's mail id
 - **Billing Address**
 - **GST Treatment** - Selected customer's GST type

- **GST Number** - Show if customer table contain GST number.

- **Place of Supply** – In the dropdown Customer's shipping state as selected. And we can change place of supply if we want.

- **Invoice** – We can type invoice number based on the company needs. Number followed by with or without pattern is possible. Show next possible invoice number with pattern automatically and we can change it. If we change show an alert message of changed pattern or number. But we can save with changed value also.

- **Reference Number** – Serial number show automatically. If one record gets deleted show the next reference number of deleted record.

- **Date** – Display today's date, and we cannot change date.

- **Transaction Type** – We can select either '**Goods**' or '**Services**'.

- If we selected **Goods** then show input field to enter **HSN Number**. If we selected **Services** then show input field to enter **SAC Number**.

- **Bill Address** – We can turn **ON** and **OFF**. If it is ON show a section to enter another address here.

- **Transportation** - We can choose transportation from,

- **Bus**

- **Car**

- **Train**

- By clicking '**+**' we can add new transportation and list out in the transportation dropdown dynamically.

- **Kilometre** – Enter distance of transportation.

- **Vehicle Number** – If we selected the transportation '**Car**' then show this field to enter vehicle number for personal vehicle. Enter valid vehicle number, else show error message.

- If we selected the transaction type '**Goods**' show a table to choose. We can add multiple rows. Clicking '**+**' button row gets created dynamically and we can add item. Table contains,

- **Item** - Show the list of all items from item table based on the company and item status is 'Active'. We can type and search item in the dropdown to filter out the item.

- By clicking '**+**' we can create new item and list out in the item dropdown dynamically.

- **HSN** – While selecting an item show its HSN here

- **Quantity** – We can type an enter quantity

- **Rate** – Item **sales** rate displays here

- **Discount** – We can enter discount

- **Tax** – Show tax rate based on place of supply. If place of supply in recurring invoice and company state is same show item's **GST Tax** rate by default, which is given in the item table and we can change here if we want. The **GST Tax** rate options are,

- 0% GST

- 3% GST

- 5% GST

- 12% GST

- 18% GST

- 28% GST

- If place of supply and company state is different show item's **IGST Tax** rate by default, which

is given in the item table and we can change here if we want. The **IGST Tax** rate options are,

0% GST

0% IGST

3% IGST

5% IGST

12% IGST

18% IGST

28% IGST

- **Amount** – item's total rate

✓ **Amount = (Quantity*Rate) - Discount**

- **Remove** button. To copy the selected row and add another row with same value row or to delete selected row.

➤ **Sub Total** It will automatically generate a value, which will be Amount in the item table. If there are multiple items, the subtotal will be the total amount of the values in the 'Amount' field in the table.

➤ **IGST, CGST, SGST:** If the 'Tax' is GST, it will display two fields, **CGST** and **SGST**, each containing half the value of the GST. If the 'Tax' is IGST, it will display the same IGST value in **IGST** field.

➤ **Tax Amount** If the 'Tax' is GST, it will display tax amount as CGST+SGST else tax amount is IGST

➤ **Shipping Charge** – Field to enter shipping charge if needed

➤ **Adjustment** An input field for entering the round-off value, which can be zero or any amount. We can add or reduce total.

➤ **Total** It will automatically generate a value.

✓ **Total = Subtotal+ Tax amount+ Shipping Charges + Adjustment**

➤ **Customer Note** – Any description about e-way bill. (Optional)

➤ **Terms & Conditions** – We can enter terms and conditions here. (Optional)

➤ **File** - We can upload document for the e-way bill. (Optional)

➤ **Save** – Button to save e-way bill to the database. After save redirect to the list out e-way bills page.

➤ **Cancel** – Cancel and reload the create e-way bill page.

E-WAY BILL OVERVIEW PAGE:

If click on the any of the transaction in e-way bill list out page it redirects to the overview page. Show all content given in add e-way bill page should be displayed in overview page. In this page there is two sections. Left section shows all e-way bill listing and right section shows details of each selected e-way bill from left listing.

Left Section '**All E-Way Bill**' includes,

➤ A **search box** to filter the e-way bill details while typing any e-way bill related details, like customer name, customer email, or amount.

➤ **Sort** - Sort out the e-way bill details in ascending order based on customer name and e-way bill number.

- **All**

- **Name** – Customer Name

- **E-way bill number**

➤ **NEW** – New button to open create page to add new e-way bill.

➤ Below this contain e-way bill details,

- **Customer Name**

- **Customer Email**

- **Total Amount**

Right Section includes,

➤ Show selected **E-Way Bill** on top.

➤ **Overview** button to show all details of the selected e-way bill given in the e-way bill database table.

➤ **Templates - 3 Templates** designs with following details,

- **E-Way Bill**

- **Company details**

- **Customer Details**

- **Item details**

- **Bill Date**

- **Document Type**

- **Transaction sub type**

- **Subtotal**

- **Tax Amount**

▪ **IGST, CGST, SGST:** If the 'Tax' is GST, it will display two fields, **CGST** and **SGST**, each containing half the value of the GST. If the 'Tax' is IGST, it will display the same IGST value in IGST field.

▪ **Shipping Charge** – Only if there is a shipping charge

▪ **Adjustment** – If present

- **Total Amount**

➤ **Edit** – By clicking Edit it redirects to the edit e-way bill page, where we can edit e-way bill details, we added to the database.

➤ **Share** – Share the template through **WhatsApp** and **Email**

➤ **Print** – Print templates.

➤ **PDF** – Can take templates PDF

➤ **Comment** – We can add and view comment for e-way bill

➤ **Attach** – Dropdown with '**Attach File**' option, where we can attach document here. If we attached any document show option '**Download File**' to download the document in attached.

➤ **Delete** – We can delete e-way bill.

If we add or edit e-way bill, the created or altered date and name of created or altered person should be displayed in the transaction history.