–––GST Queries:

1. How to upload, download and file GSTR1 to avoid Nil returns?

Need to probe whether API username is created from the portal? Or we need to guide how create the API username.

If API username is created, Sure <customer name> Sir/Ma’am. I will assist you on this step by step. There is a help article available. Please press Alt+H, type **Upload GSTR 1 from TallyPrime in** the search box, you will get the article, and you can refer to this for your reference.

<customer name> Sir/Ma’am, Now I will explain you step by step.

* Please press Alt+G (Go To) on your keyboard and select **GSTR-1**.
* Now, select the appropriate return period and the GST registration for which you want to upload your vouchers.
* Next, go to the **Ready for Upload** section. Here, you can see all the transactions that are pending for upload to the GST portal.
* Please press Alt+Z (Exchange) and choose **Upload GST Returns > GSTR-1**
* Press the Spacebar to select specific vouchers for upload. If you want to upload all the vouchers, there's no need to select any vouchers
* Now, press S (Send) to start the upload process.
* You'll need to enter your GST username. Please go ahead and do that now
* You should receive an OTP on your registered mobile number. Please enter that OTP to continue. Once entered, the vouchers will be exported to the GST portal.
* Once the upload is complete, you'll see a confirmation message: 'Upload is now complete for the selected GST Registration and return period.
* The uploaded vouchers will now be moved to the **No Action Required** section. This means they have been successfully uploaded to the GST portal.
* Press **Alt+Z (Exchange)** and select **Download GST Returns**.
* You'll see all the Return Types selected by default.
* Press **C (Configure)** to choose the specific Return Type (GSTR-1) and the desired Return Period.
* In the Download GST Returns screen, press **D (Download)**.
* Log in to your GST profile if you haven’t already.
* Enter your **GST Username**.
* Enter the **OTP** received on your registered mobile number to export your summaries to the GST portal.
* Your session will be valid for six hours for added security.
* Once the GSTR-1 download is initiated, you can track its progress.
* After the GSTR-1 data is downloaded from the GST portal, you'll receive a confirmation.
* Now, you can view the downloaded details in the **GSTR-1 Reconciliation report**.
* Once reconciliation is competed, Press ALT+Z to file the returns by providing the PAN number which is available in the GST portal.

Your GSTR-1 has been filed successfully. We also have videos related to GSTR-1 which is very simple to understand. Would you like to receive the video on your WhatsApp?

1. How Can I reconcile GSTR-1?

Sure <customer name> Sir/Ma’am. I will assist you on this step by step. There is a help article available. Please press Alt+H, type <Reconcile GSTR -1 Data> in the search box, you will get the article, and you can refer to this for your reference.

<customer name> Sir/Ma’am, Now I will explain you step by step.

* Press **Alt+Z (Exchange)** and select **Download GST Returns**.
* You'll see all the Return Types selected by default.
* Press **C (Configure)** to choose the specific Return Type (GSTR-1) and the desired Return Period.
* In the Download GST Returns screen, press **D (Download)**.
* Log in to your GST profile if you haven’t already.
* Enter your **GST Username**.
* Enter the **OTP** received on your registered mobile number to export your summaries to the GST portal.
* Your session will be valid for six hours for added security.
* Once the GSTR-1 download is initiated, you can track its progress.
* After the GSTR-1 data is downloaded from the GST portal, you'll receive a confirmation.
* Now, you can view the downloaded details in the **GSTR-1 Reconciliation report**.

We also have videos related to GSTR-1. Would you like to receive the video on your WhatsApp.

1. How to do GSTR-2A and GSTR-2B online reconciliation?

Sure, I can guide you through that. Let's start the process step-by-step.

* Please press Alt+G (Go To) and type **GSTR-2A Reconciliation** or **GSTR-2B Reconciliation**, then select the appropriate option.
* Now, choose the return period and the GST registration ( If customer as multi registration) for which you want to perform the reconciliation
* Now, press Alt+Z (Exchange) and select **Download GST Returns**.
* In the **Download GST Returns** screen, click on configuration option select the return type, either GSTR-2A or GSTR-2B, and the return period.
* Please press D (Download) to begin the download process.
* You will now need to log in to your GST profile. Please enter your GST username and the OTP received on your registered mobile number.
* Once you are logged in, the session will remain valid for six hours for security purposes.
* After the download is complete, you can view the reconciliation data directly in the report.
* It will automatically match transactions and display the reconciliation status as **reconciled**, **mismatch**, or **pending**.
* If transactions are in mismatch and you can clear the mismatch by Ignoring invoice amount, Ignore roundoff difference & Copying invoice no’s from potentially mismatch.
* You can manually reconcile or un reconcile the transactions if needed. Please review any mismatched transactions and make the necessary adjustments.
* Once you've completed the reconciliation, make sure to save the report.
* Ensure that all mismatched entries are corrected and updated in your books.

1. Why is direct filing of GSTR3B not supported in Tally Prime, and what are the correct steps for uploading GSTR3B, if the GST registration is monthly?

Filing GSTR-3B involves multiple steps: uploading the return, transferring funds to e-ledgers, setting off liabilities using ITC and cash, and finally, filing the return. Currently, due to the absence of Challan generation and fund transfer APIs from GSTN, Tally can only support steps 1 (upload) and 4 (filing), while steps 2 (fund transfer) and 3 (setoff) need to be completed on the GST portal. Full end-to-end return filing from Tally will be possible once GSTN provides the necessary APIs for these functions.

To upload the GSTR3B need to follow the below steps:

* Please, press Alt+G (Go To) and select **GSTR-3B**. Choose the return period and GST registration for which you want to generate the GSTR-3B report.
* Review all the transactions included in the report. Make sure that all sales, purchases, and tax details are correct. If you spot any discrepancies, make the necessary adjustments.
* Please press Alt+Z (Exchange) and choose **Upload GST Returns > GSTR3B**
* Now, press S (Send) to start the upload process.
* You'll need to enter your GST username. Please go ahead and do that now
* You should receive an OTP on your registered mobile number. Please enter that OTP to continue. Once entered, the vouchers will be exported to the GST portal.
* Once the upload is complete, you'll see a confirmation message Upload is now complete for the selected GST Registration and return period.
* Press **Alt+Z (Exchange)** and select **Download GST Returns**.
* You'll see all the Return Types selected by default.
* Press **C (Configure)** to choose the specific Return Type (GSTR3B) and Select the desired Return Period.
* In the Download GST Returns screen, press **D (Download)**.
* Log in to your GST profile if you haven’t already.
* Enter your **GST Username**.
* Enter the **OTP** received on your registered mobile number to export your summaries to the GST portal.
* Once the GSTR3B download is initiated, you can track its progress.
* After the GSTR3B data is downloaded from the GST portal, you'll receive a confirmation.
* Now, you can view the downloaded details in the **GSTR3B report**, cross check the values by reconciling the return.
* Now login to the portal and transfer funds to e-ledgers and set off the liabilities using ITC and cash and complete the filing from the portal.

Incase customer ask for offline upload, please continue with the below checklist.

* Next, press Alt+Z (Exchange) > **Export**. Choose **GSTR-3B** and select the format as **JSON**. Save this JSON file to your computer, this is what you’ll upload to the GST portal.
* Now, log in to the GST portal. Go to **Returns** > **Returns Dashboard**. Select your return period and choose **GSTR-3B**. Click on **Prepare Offline** and upload the JSON file you just exported from Tally Prime.
* After uploading, review the data on the GST portal. Click on **Submit** to freeze the data, and then select **File GSTR-3B** to proceed with the filing. You may need to enter an OTP or use a digital signature for the final submission.
* If there’s any tax liability, you can make the payment through the GST portal. Once done, download the acknowledgment receipt for your records.

1. What are the new features in Tally Prime 5.0?

Upgrading to TallyPrime 5.0 offers several key benefits that can streamline your GST compliance and enhance your overall business efficiency. Here are some of the highlights:

1. **Connected GST:** Effortless filing and real-time party information.
2. **Enhanced Reporting and Notifications**
3. **Automated TDS Management:** TDS Section 194Q
4. **Improved Cash Flow Management:** Manage your payments more efficiently

If customer would like to know more about these features, guide through each one:

**Connected GST:**

With TallyPrime 5.0, you can upload and file GSTR-1, GSTR-3B, and CMP-08 directly from the software, eliminating the need to visit the GST portal. You can also download GSTR-1, GSTR-3B, GSTR-2A, and GSTR-2B with just a few clicks. Additionally, reconciling GSTR-1, GSTR-2A, GSTR-2B, and GSTR-3B is now easier than ever.

**Real-Time Party Information:**  
Automatically create and validate party ledgers using real-time details directly from the GST portal, ensuring accuracy and saving you valuable time.

**Automated TDS Management:**  
TDS Section 194Q automation allows for easy TDS calculations on purchases exceeding Rs. 50 lakhs annually. It also manages TDS exemptions and updates TDS details for multiple parties effortlessly.

**Enhanced Reporting and Notifications:**

* **Stripe View:** Improves the readability of reports by highlighting alternating rows, making it easier to handle large volumes of data.
* **Instant Notifications:** Stay informed about crucial tasks like TSS renewals and GST filings with the new Bell icon and Notifications report.

**Improved Cash Flow Management:**

* **Sort Pending Bills:** Prioritize payments efficiently by sorting bills based on due dates and other criteria, helping you reduce late fees and improve cash flow management.

1. How to upload vouchers to GSTR-1 under the IFF Scheme.

Sir/Ma’am. I understand that you file your returns every quarter. Under the IFF scheme, you'll need to upload your B2B and CDNR vouchers at the end of every month within the quarter, and then upload the remaining sections along with the summary at the end of the quarter. If this is what you need to do, let me guide you through the process in TallyPrime.

* First, please go to **Gateway of Tally > Company Features**.
* Enable **Goods & Services Tax** and check if the periodicity of GSTR-1 is set to **Quarterly**
* If it's selected as **Quarterly**, go back to the **Gateway of Tally**.
* Select **Go To > Type GSTR-1** and press **Enter**. Please ensure the period is set to **Quarterly**.
* Now, press **Alt+Z** for **Exchange > Upload GST Returns**.
* Press **F12** for **Configuration** and enable the option **"Filing Period for Online Upload (QRMP/IFF)"** by selecting **Yes**.

**Note:** This option ensures you can upload vouchers for each month of the quarter individually for the IFF scheme and upload the summary at the end of the quarter.

* Now, check if you see the **summary count** at the top left; it should display **3**.
* Change the period by pressing **Alt+F2** and select the period for the first month of the quarter.
* Press **Alt+S** to **Send** and provide the OTP. This will upload the vouchers successfully for the first month.
* Once uploaded, you will return to the GSTR-1 report screen.
* Press **Alt+Z > Upload GST Returns** and change the period to the **second month** of the quarter. Press **Alt+S** to **Send** and upload the vouchers.
* After uploading for the second month, go back to the GSTR-1 report.
* Press **Alt+Z > Upload GST Returns** and change the period to the **third month** of the quarter. Press **Alt+S** to **Send** and upload the vouchers.
* Finally, return to the GSTR-1 report screen.
* Press **Alt+Z > Upload GST Returns** and set the period for the entire **Quarter**, you should see the **summary count as 3**. Press **Alt+S** to **upload** the summary for the quarter.