PARTNERS (B2B) USER MANUAL

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1.   Summary

The GST.AI user manual is a comprehensive document for users accessing the GST Portal in India, catering to a range of entities, including consulates/embassies, UN Bodies, overseas agents, and taxpayers in India. The manual defines the registration process, which includes PAN and email verification. Upon successful registration, users are directed to the account login landing page, where they can manage various aspects of their account, such as company details, user information, and GSTIN details.

The manual outlines portal features such as dashboard navigation and functionalities available within the profile section, restricting specific fields from editing for data integrity.

Users can manage company details, user information, GSTIN details, and sub-user management. The manual elaborates on the process of amendments, including types of amendments and approval procedures. It also explains the importance of document history and the audit trail feature for compliance and record-keeping.

Reports play a significant role, with various types available including Invoice Report, GSTIN Master Report and GST Report. These reports provide insights into transactions, revenue, and ticketing status, facilitating analysis and compliance.

Overall, the manual provides a step-by-step instruction document for corporate passengers and all other registered passengers travelling for business reasons to navigate the GST Portal, ensuring support, management, and compliance with Goods and Services Tax regulations in India.
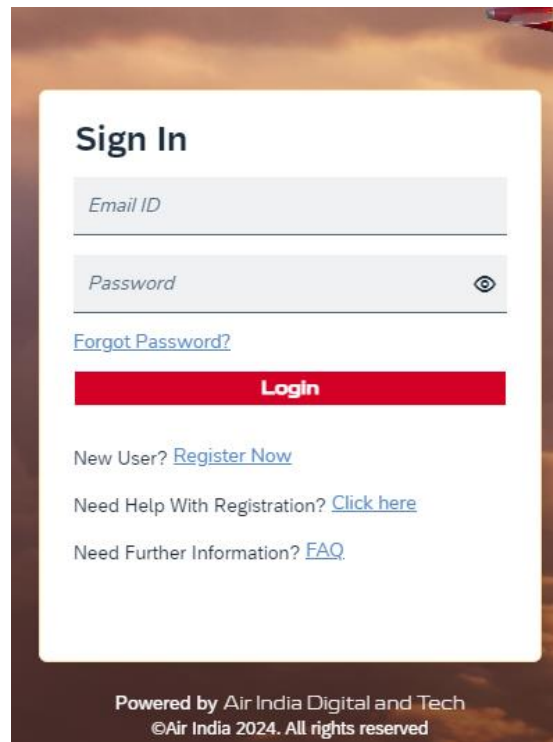
B2B User Manual

2. Sub-user account creation

Once the registration has been approved, your account will be created as an admin user, which will have all the functionalities mentioned under dashboard navigation.

However, in case you would like to provide access to multiple users in your organisation with limited rights, this is how you can do it:

2.1. ACCESSING THE GST APPLICATION

Access the GST Application | Air India (ondemand.com) to initiate the registration process. You will be directed to the GST homepage.

2.2. NEW REGISTRATION PAGE

Click on "New User? Register Now" and select the appropriate category (Others - Taxpayers in India).

2.3. SELECTING USER CLASSIFICATION

When registering a new account, you will be prompted to choose the user category applicable to you from the given list. Depending on your classification, you will need to select one of the following options:

- Taxpayer in India – Businesses and online travel agencies (OTAs) registered in India must choose this option to proceed with their registration process.
- Overseas Agent – Online travel agencies that are registered outside India must choose this option to proceed with their registration process.
- Consulate/Embassy – If you represent a consulate or an embassy, you must select this category.
- UN Body – Representatives of various bodies of the United Nations

2.4. PAN AND EMAIL VERIFICATION

- To proceed with the registration as a sub-user process, please provide the Permanent Account Number (PAN) associated with either the user's business or proprietor. PAN is mandatory for registration (only for taxpayers in India).
- Additionally, please enter the email address of the sub-user.

2.5. OPTION FOR SUB-USER

- GST.AI will provide a pop-up message by providing you with an option to register as a sub-user.

- Once you accept, you will be required to provide only the sub-user details.

- After submitting the request for a sub-user, the admin can approve or reject the request of the sub-user under the Profile section of the dashboard.
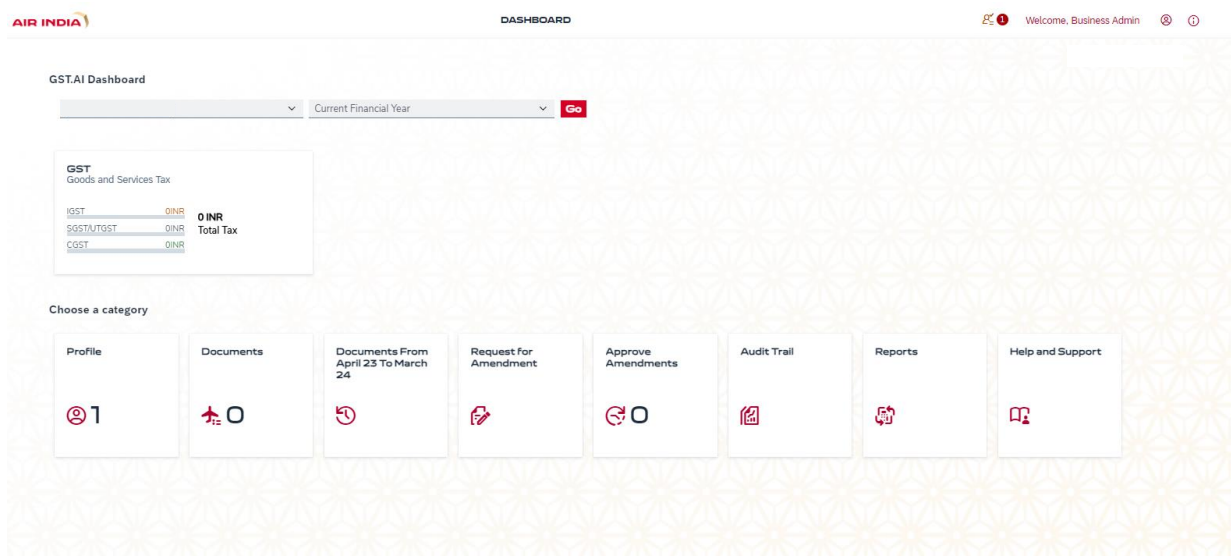

3. Dashboard Navigation

After successful registration on GST.AI, users gain access to a comprehensive dashboard equipped with various features that enable efficient management and compliance. Here's an overview of the available features:

- **Profile**
- **Documents**
- **Document History**
- **Request For Amendment**
- **Approve Amendments**
- **Audit Trail**
- **Reports**

Only admin users will have access to all the features mentioned above. In case you are a sub-user, you will not be able to use the Approve Amendments feature.

3.1   Profile

Upon accessing the dashboard, users can navigate to their profile section. Here, users can view and edit registration details as necessary. However, certain fields such as category, company PAN, and country are restricted from editing to maintain data integrity.

A screenshot of the features available under the Profile section:
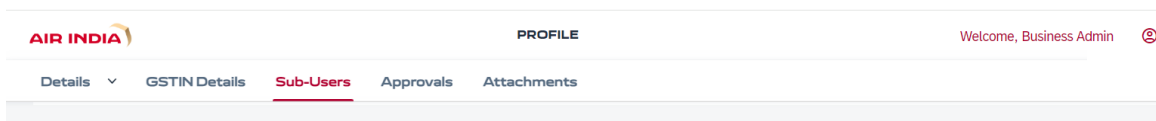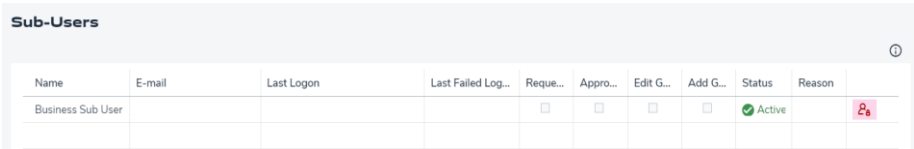
The overview and functionality of this section are detailed below for your reference:

Overview	Functionality
Provides comprehensive visibility into all provisions related to company details.	Facilitates edits to various company details, excluding restricted fields like category, company PAN, and country.
Notification for any pending sub-user account to be approved.	Under the sub-user section, admin can restrict the rights of sub-users.

Note: Editing of restricted fields is prohibited to ensure data integrity and compliance.

Functionalities of individual features are provided below for your reference:

Name of sub-feature	Functionalities
Company details	Review and edit company details, **excluding category, company PAN, and country.**
User management details	Review and modify user details i.e. name or mobile number, **excluding the login email address.**
GSTIN details	Review, **add, edit, delete and export** GSTIN details
Approvals	Feature available for admin users to approve the sub-user accounts request based on validation.
Sub-user management	Facilitates **management of sub-users** and granting necessary **approvals**. Admin users hold the authority **to block sub-users** for enhanced control.
Attachments	Effortlessly view and upload necessary documents in supported formats, with options to delete documents as needed. The documents can be uploaded as JPG, JPEG, PNG, DOC, or PDF files up to 400 KB in size.

3.2   Documents

Documents section provides users access to ticket-level data for the current financial year.

A screenshot of the features available under the Documents section:

Overview and functionality of this section are detailed below for your reference:

Overview	Functionality
Availability of Tax invoices, Debit Notes, Credit Notes, Bill of Supply, Bill of Supply Debit Notes, and Bill of Supply Credit Notes. Neatly presented in a tabular format for easy reference.	**Search:** To swiftly locate specific documents, enhancing efficiency in document retrieval. **Document Handling:** • **View and Download** documents in PDF format. • **Export Table of** Documents in Excel format for efficient record keeping. • **Bulk Download of** documents simultaneously.

3.3   DOCUMENTS FROM APRIL 2023 TO MARCH 2024

This section allows users to access ticket-level data from April 2023 to March 2024 year.

Overview	Functionality
Availability of Tax invoices, Debit Notes, Credit Notes, Bill of Supply, Bill of Supply Debit Notes, and Bill of Supply Credit Notes for the period pertaining to previous year. Neatly presented in a tabular format for easy reference.	**Search:** To swiftly locate specific documents, enhancing efficiency in document retrieval. **Document Handling:** • **View and Download** documents in PDF format. • **Export Table of** Documents in Excel format for efficient record keeping. **Bulk Download of** documents simultaneously.

3.4   SELF-AMENDMENT PROCEDURES:

This feature of GST.AI provides self-service functionality to amend the non-financial statistics on the GST Invoices, Debit Notes, Credit Notes, Bill of Supply, Bill of Supply Debit Notes, and Bill of Supply Credit Notes.

The workflow may be different based on the period in which tickets and amendment fall.

The customer may encounter the amendments under two scenarios, the workflow for those have been demonstrated below:

Scenario 1: Amendment made by the customer before the filing of GSTR 1 (GST monthly return) by Air India by 4th of the following month.

Admin/Sub-user request for amendment of documents	Admin approves the request	Cancellation of old invoice (with CAN watermark) and issue of new invoice	Document sub-setion have both cancelled and new invoice

Scenario 2: Amendment made by the customer after the filing of GSTR 1 (GST monthly return) by Air India by 4th of the following month.

Admin/Sub-user request for amendment of documents	Admin approves the request	Auto generation of credit notes and new invoices	Old Invoice continues in Document

3.4.1   REQUEST FOR AMENDMENT

Change GSTIN / Remove GSTIN / Change Address:

Both admin users and sub-users have the authority to initiate requests for amendments. The workflows will be applied accordingly to the amendment requests which can be placed under the following conditions:

Please note that the below steps have been elaborated considering the amendments made post filing by 4th of the following month. However, the basic principle of amendments remains same as defined above.

1. **Change GSTIN: GSTIN has been incorrectly provided for the other state.**
For e.g., instead of GSTIN of Uttar Pradesh, you have provided the GSTIN of Rajasthan while booking. In such scenarios, please follow the below process:

Step 1: Select the invoice for the amendment and click on the new request button.

Step 2: Select the Change/Add GSTIN action from the drop-down list.

Step 3: In this step, user can provide the GSTIN of the other state i.e., Rajasthan or Karnataka from the New GSTIN drop-down list.

Step 4: Click on 'OK' to submit the request.

The approval process steps are the same as <u>described below</u>.

2.   **Remove GSTIN: The ticket has been incorrectly issued in your GSTIN and hence, needs to be removed from your GSTIN.**

For e.g. a ticket is available in your document/ document history. However, that specific ticket has not been booked by you. In such scenarios, please follow the process:

Step 1: Select the invoice to be removed and then click on the new request button. Select the Remove GSTIN action from the drop-down list, fill out the address and reason for removal, and click on the 'Request' button.

The approval process steps are the same as described below.

3. **Add GSTIN:** You booked a ticket either through an agent or a website. However, the same is not available in your document/ document history. In such scenarios, please follow the process:

Option A: Consult with the agent who booked your ticket to add GSTIN to the ticket. The process will be:

| Agent's admin request for amendment | Admin approves the request | Request to be submitted to Air India for approval | Air India admin approves the request | A new tax invoice is issued and will start appearing under the Document tile |
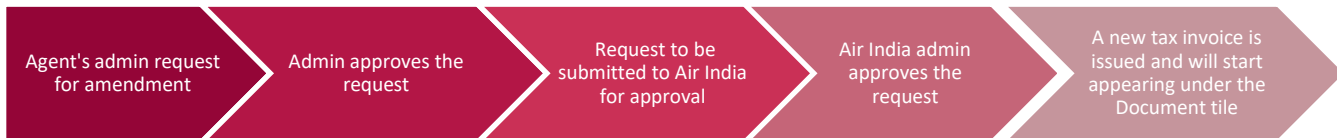
Option B: Consult with *gstsupport@airindia.com* for amendments. The process will be:

| Request to be sent to Air India for approval via email at gstsupport@airindia.com | Air India Sub-user will initiate the request | Air India admin approves the request upon data validation | A new tax invoice is issued and will start appearing under the Document tile |

The approval process steps are the same as <u>*described below*</u>.

4. **Bulk amendments:**

Step 1: Initiate bulk amendments of documents by downloading the bulk amendment template.
Step 2: Provide the appropriate invoice number, action, and reason for amendment in the template.
Step 3: Upload to GST.AI, the status of the amendment will be auto-requested for approval.
Step 4: Approval process steps are the same as <u>described below</u>.

Screenshots of the bulk amendment process are provided below:
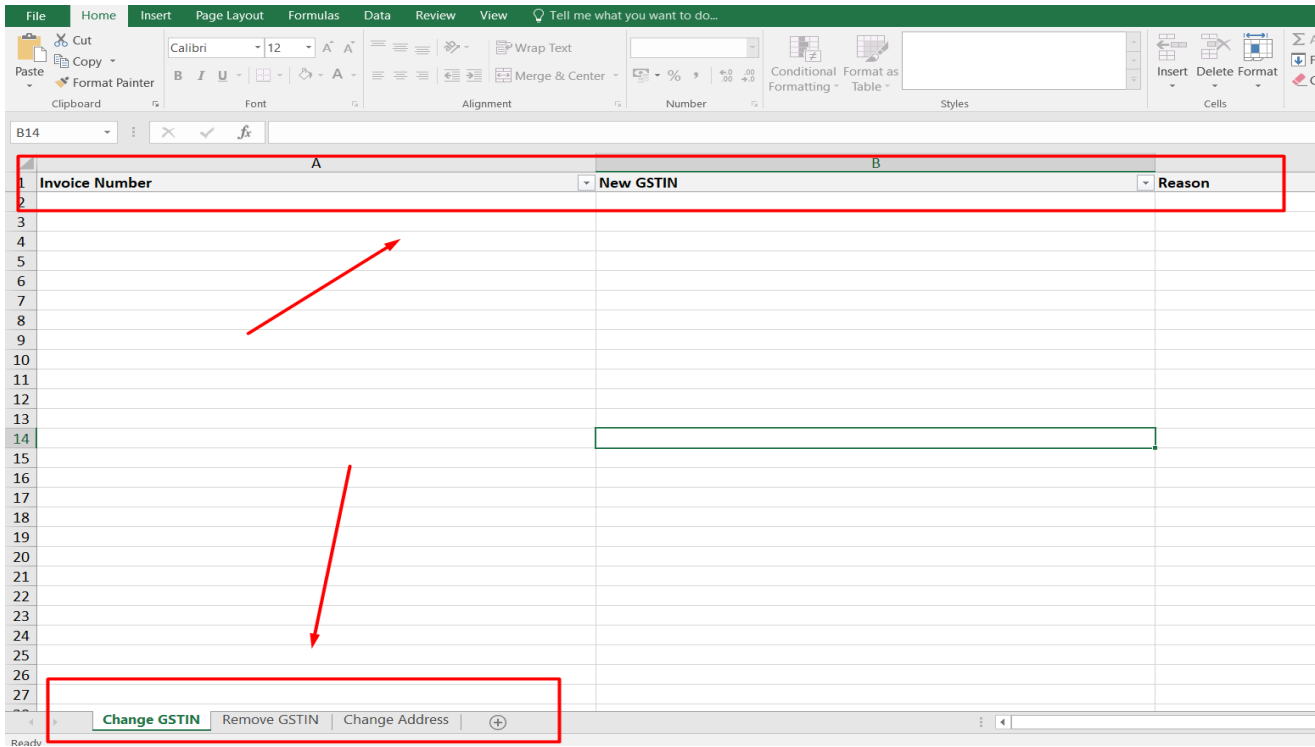
3.4.2   APPROVE AMENDMENTS

Step 1: Select the Approve Amendments tile from the dashboard.
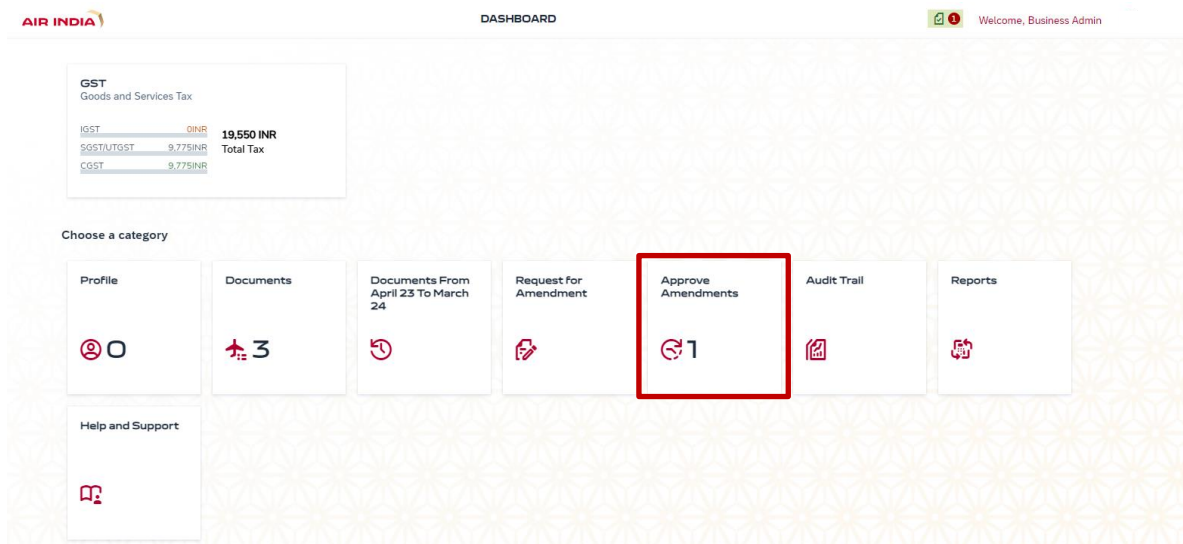
Step 2: Select the invoice for approval and click on the approve button.

Step 3: Click on 'Close'.

Step 4: User can download the Amended Invoice by click on the red pdf button and Original invoice by click on the blue pdf button. Credit Note also have the same functionality

3.5 REPORTS

The following reports are available to support you in the efficient and smooth filing of GST returns.

- GSTIN Master Report
- GST Report
- Invoice Report

A screenshot of the Report section is provided below for your reference:

A brief description of the reports is provided below for your reference:

Report Type	Description	Other Features
GSTIN Master Report	Provides details of all GSTINs associated with a PAN for the logged-in user's company.	• Allows searching for a specific GSTIN. • Download the details in Excel for your records.
Invoice Report	Summary of all the GST documents issued during a selected period and GSTIN.	• Facilitates refining of report by allowing multiple options. • Download the details of selected tickets in Excel for your records. • Readily access to download the GST documents, either single or in bulk.
GST Report	An exhaustive report that provides itemised details of your GST documents, which can support you in bookkeeping as well as tax filing.	• Facilitates refining of reports by allowing multiple options. • Download the details of selected tickets in Excel for your records. • Readily access to download the GST documents, either single or in bulk.

Screenshots of these reports are given below for your reference:

GSTIN Master Report

Invoice Report

GST Report

3.6 AUDIT TRAIL

The Audit Trail feature provides a detailed record of all changes made within the system. This feature provides a comprehensive overview of the activities with details of affected modules, types of events, old and new values, users responsible, timestamps, and status information.
The above-mentioned features are available in two forms in GST.AI. i.e. System Log and Invoice Log. The system log captures the activities undertaken on GST.AI, and the Invoice log shows you the lifecycle of an invoice.

System Log:

Invoice Log:

4   Help & Support

If you're facing any challenges with the operation or any other aspect of the GST portal that is not addressed in the manual, you can send your queries to gstsupport@airindia.com.