USER MANUAL

Document Dated: 28/05/2021

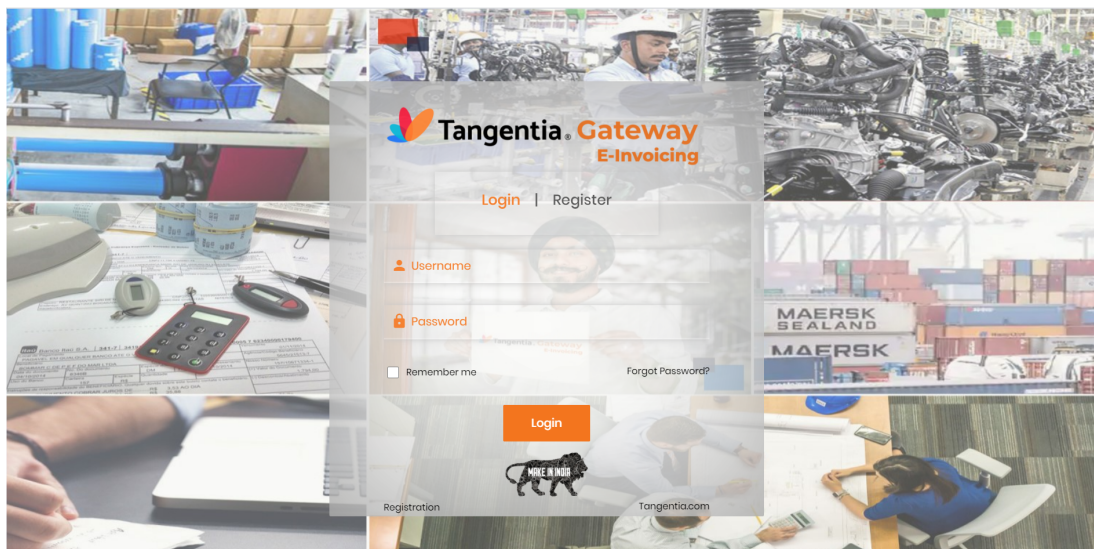Prepared for: Tangentia Gateway E-Invoicing application

Contents

1. Tangentia Gateway E-Invoicing Portal

1.1. Login

E-Invoice can be accessed from Tangentia Gateway E-Invoicing Portal.

1. Navigate to the website https://einvoicing.tangentia.com/login(figure 1)
2. Click on the "Username" and type in the username.
3. Click on the password and type in the password.
4. Click on "Login" or press Enter key, to Log into the page.

Figure 1. login page of the E-Invoicing application.

1.2.Registration

Registration page can be accessed from Tangentia Gateway E-Invoicing Portal.

1. Navigate to the website https://einvoicing.tangentia.com/login (figure 2)
2. Click on the "Register" button to nabvigate to registration page.
3. Click on the "Register Now" button to start registration.(figure 3)
   a. Once clicked on "Register Now" button, a page to select the plan appears.
4. Or scroll down the page and the plan selection page can be seen directly. (figure 4)
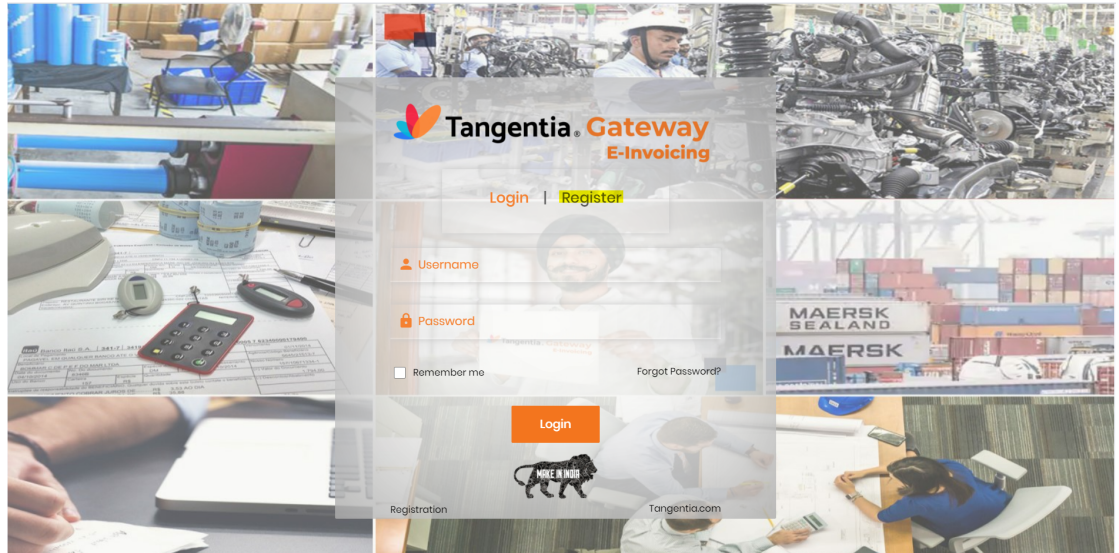
Figure 2. Home page of the E-Invoicing application.

Figure 3. Registration page of the E-Invoicing application.
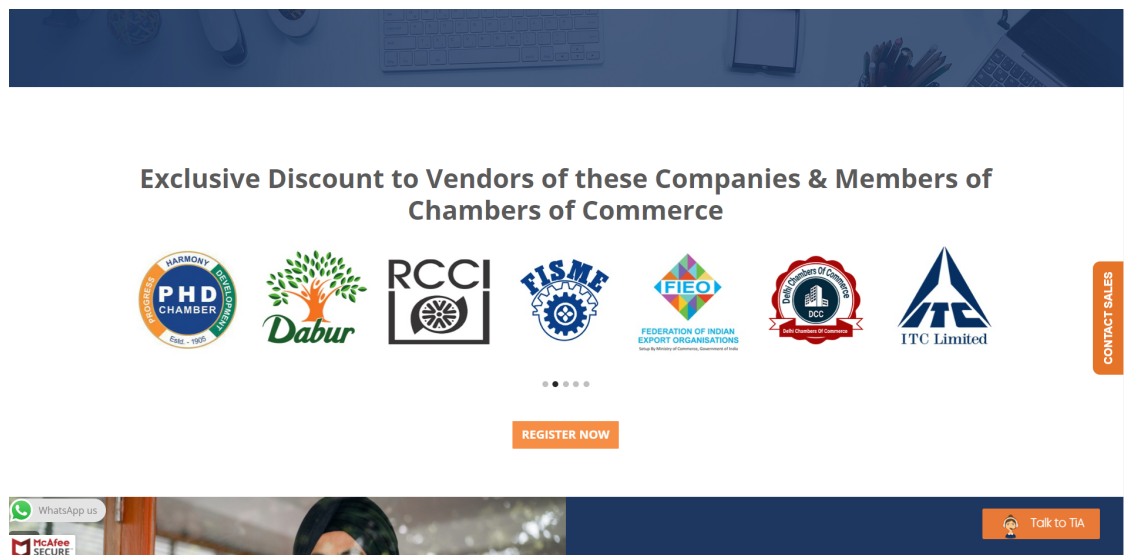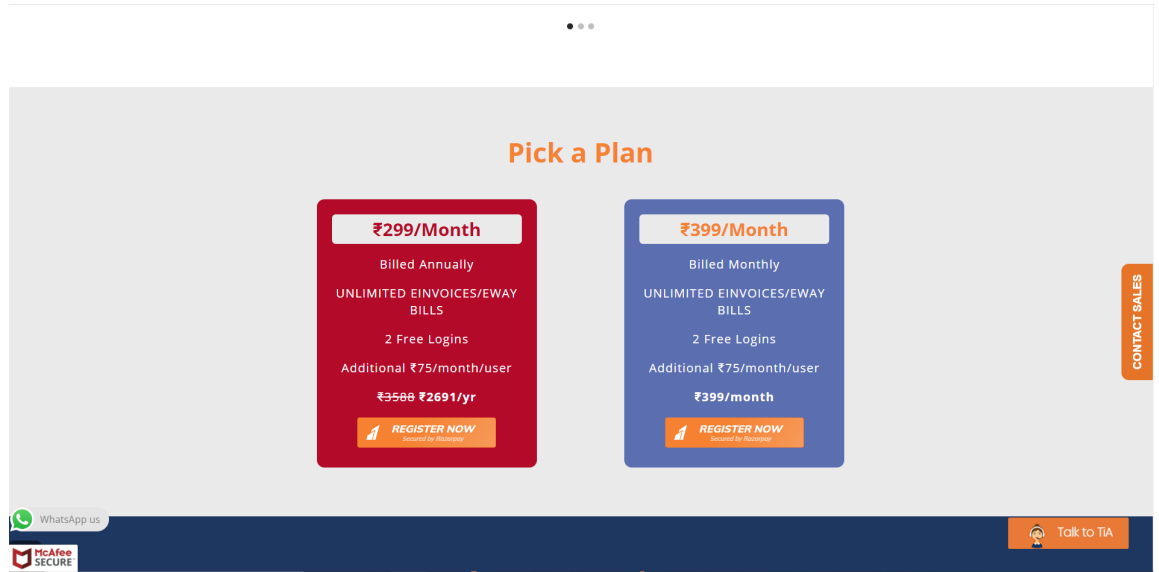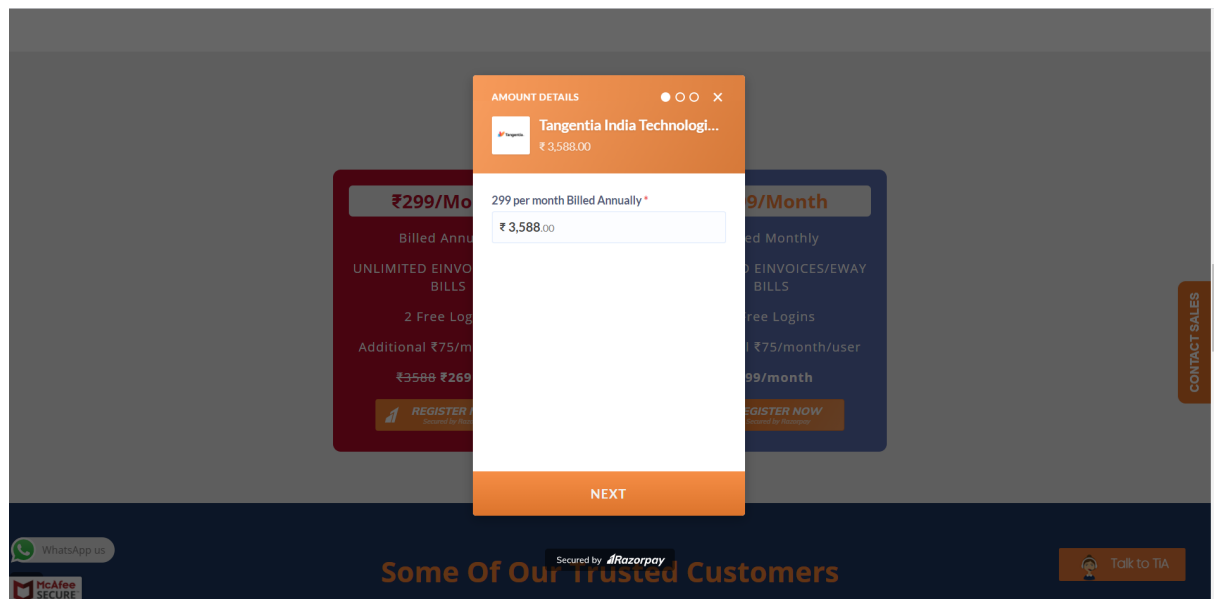
Figure 4. Registration page of the E-Invoicing application

5. The page will ask the user to pick a plan. One plan is billed annually and the next one is billed monthly.
6. Select a plan and click on "Register Now".
7. A Razorpay portal will be displayed which displays the amount details and click NEXT. (Figure 5)
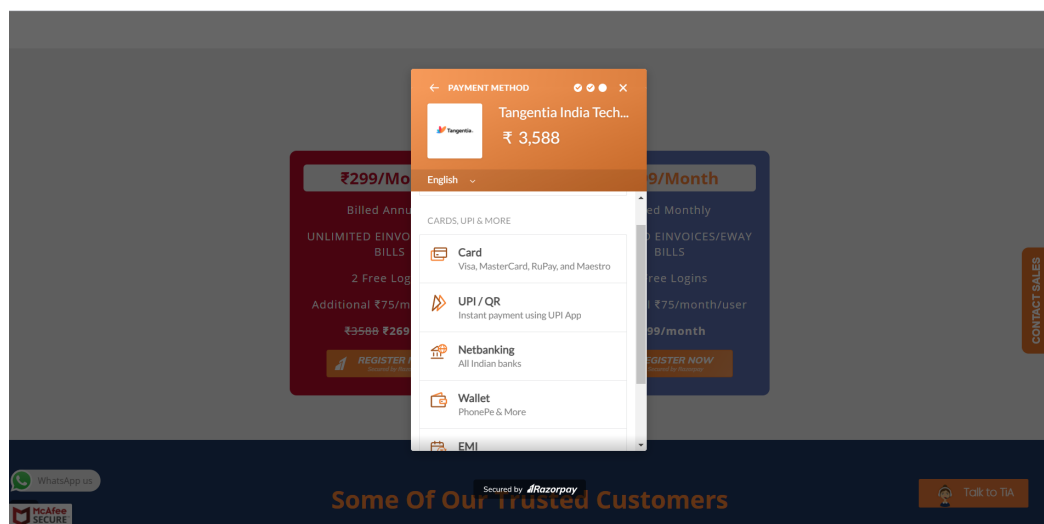
Figure 5. Razorpay portal

8. Fill in the user details and click "PROCEED TO PAY".(figure 6)

Figure 6. User Details page.
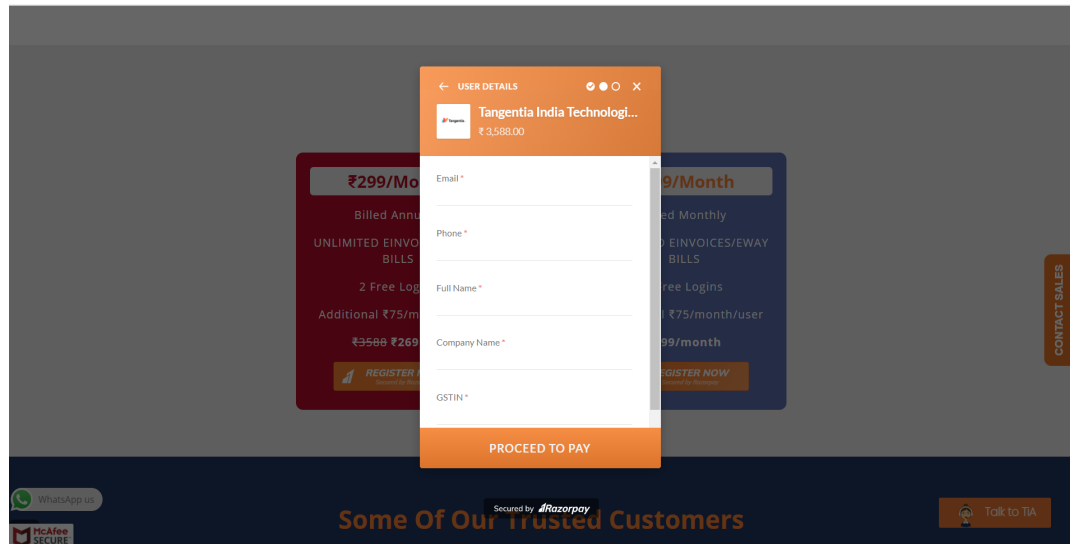
9. Complete the payment by selecting the desired mode of payment.

Figure 7. Payment Method.

2. Manage organization, buyer & transporter information

- login to the Tangentia Gateway E-Invoicing portal.
- Click on the Settings menu.
- There will be three options: (Figure 8)
    - Manage Sub-Organization – To Add/Edit/Delete Sub-Organizations

      o   Manage Buyer - To Add/Edit/Delete Buyers

      o   Manage Transporter - To Add/Edit/Delete Transporters

Figure 8. Settings menu to manage organization, buyer & transporter information.
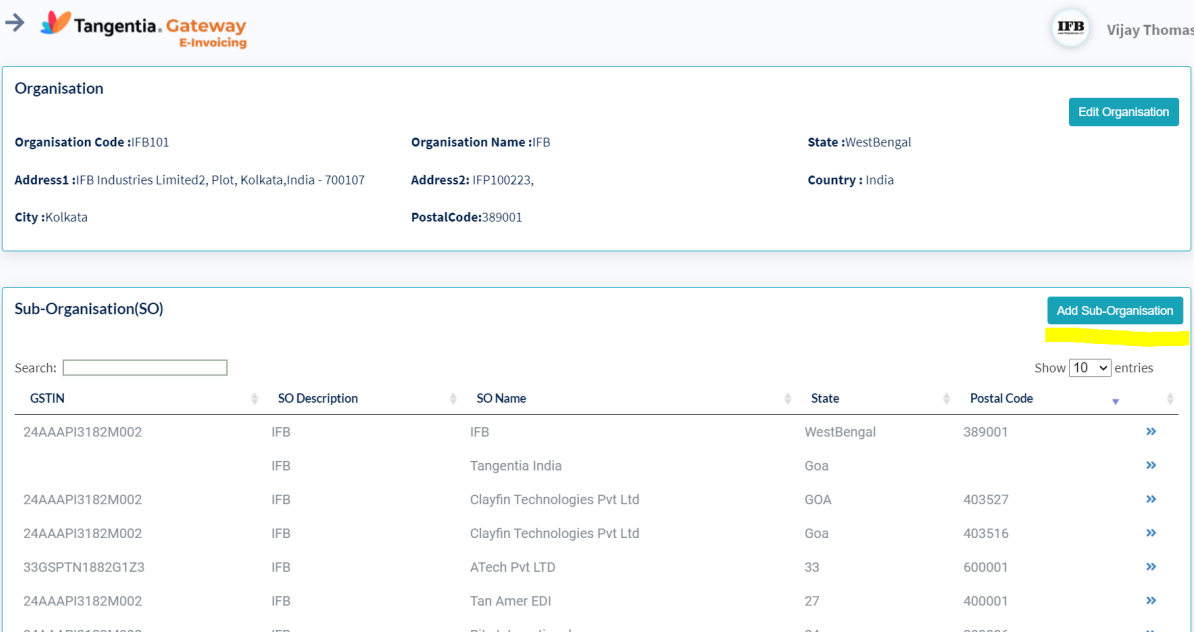

2.1. Manage Organization

You can create a new sub-organization and also edit a sub-organization under the Manage Sub-Organization tab.

I.   Adding a new sub-organization

i.   Click on "Manage Organization" under Settings.

ii.   Click on "Add Sub-Organization" under the "Sub Organization(SO) section. (Figure 9)

iii.   Click on Validate button after entering details in the "GSTIN" column. All the details of the particular organization will be auto-populated. (Figure 10)

iv.   Fill in the required details and click on the "Register" button. (Figure 11)

Figure 9. Manage Organization page.

Figure 10. Add Sub Organization section
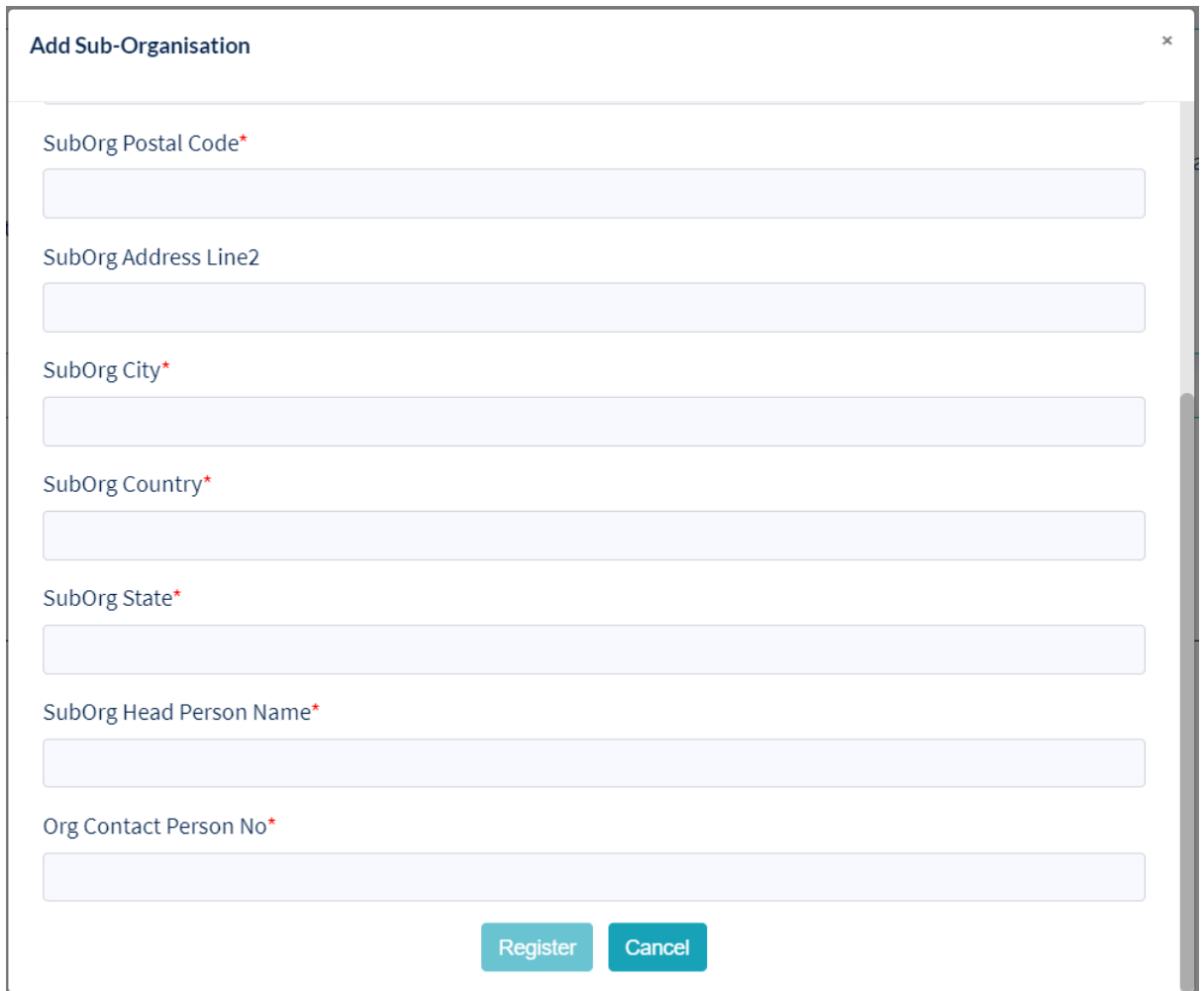
Figure 11. Register Sub Organization
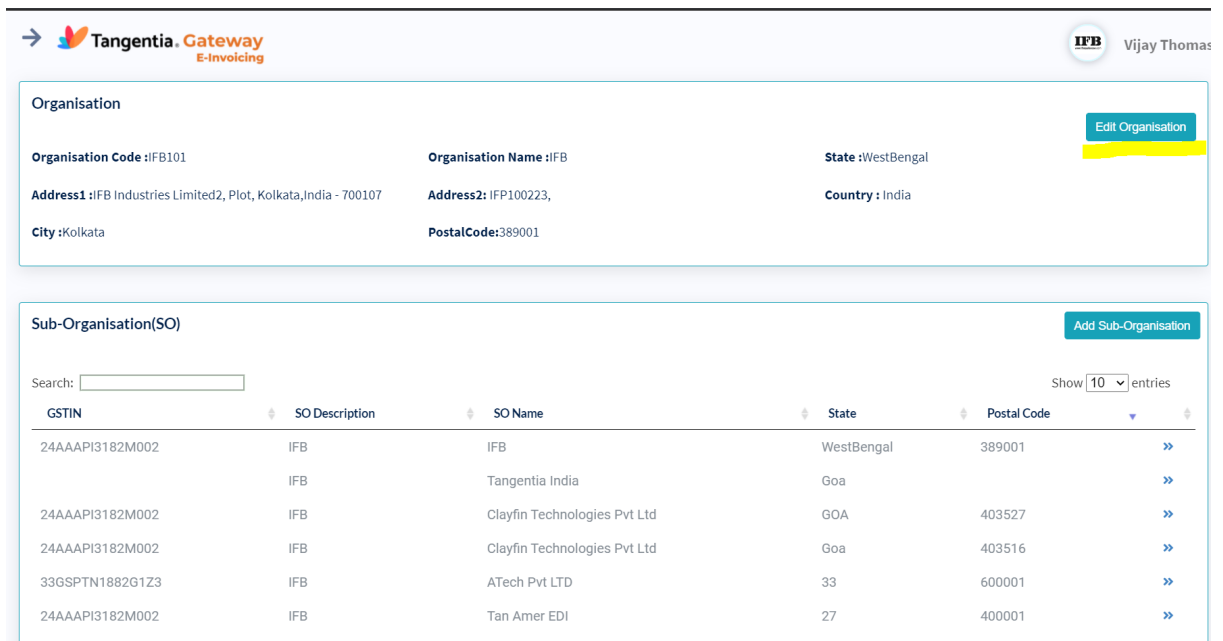

II.   Editing a new sub-organization

i.   Click on "Manage Organization" under Settings.

ii.   Click on "Edit Organization" under the "Organization(SO) section. (Figure 12)

iii. Edit all the required and click on the Save button. (Figure 13)

iv.   A pop up appears "Organization Edited Successfully"

Figure 12. Manage Organization page

Figure 13. Edit Organization section

2.2.Manage Buyer

You can create a new buyer organization or sub-organization and also edit organization details under the Manage Buyer tab.

I. **Add a new buyer Organization or Sub-Organization**
   i.   Click on "Manage Buyer" under Settings.
   ii. Click on "Add Organization" or "Add Organization. (Figure 14)
   iii. Click on Validate button after entering details in the "GSTIN" column.

iv. If the Organization details is not complete, a form will be displayed to fill in the missing details and all the available details will be auto-populated.

   a. Fill in the required details and click on the "Register" button. (Figure 15)

v. If the organization details are already present in the system, a screen with Organization list is displayed.

   a. Click on the "Map" button to add the buyer Organization.

Figure 14. Add Buyer Organization section

Figure 15. Register Organization section

Figure 16. Organization List page
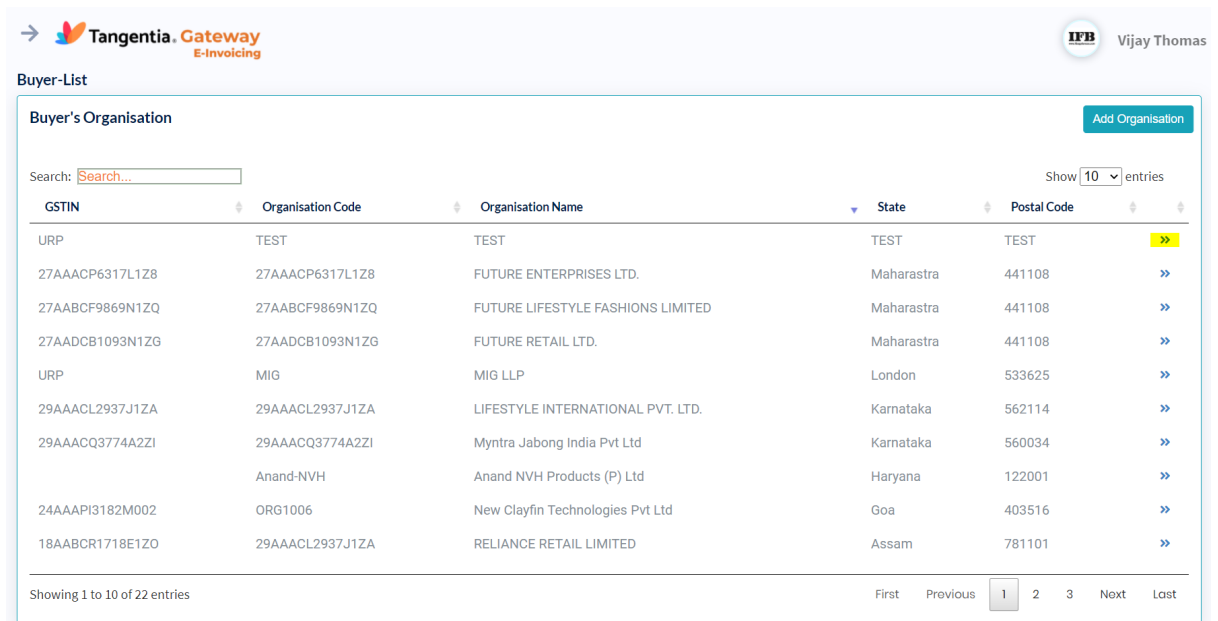
II.   Editing a buyer Organization or Sub-Organization

i.   Click on "Manage Buyer" under Settings.

ii.   Select the required Organization or Sub-Organization and click on the double ankle bracket(Figure 16)

iii. Click on "Edit Organization" (Figure 17)

iv.   Edit all the required details and click on the Save button.

v.   A pop up appears "Organization Edited Successfully"
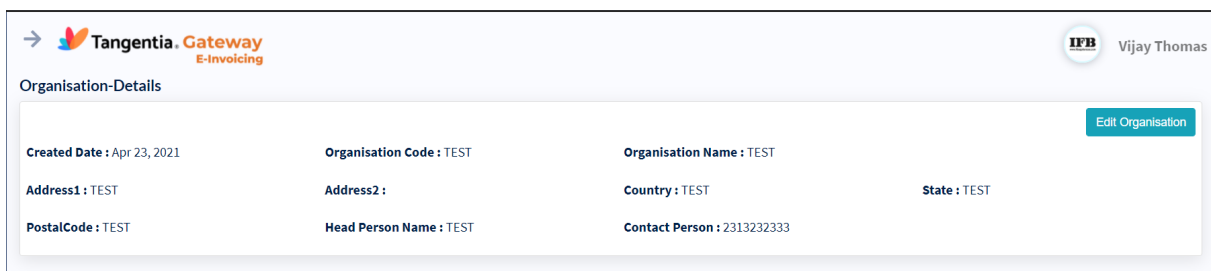
Figure 17. Manage Buyer section

Figure 18. Edit Organization section

2.3. Manage Transporter

You can add a new buyer transporter and edit or delete present transporter under under Manage Transporter tab.

I.   Add a new Transporter

    i.   Click on "Manage Transporter" under Settings.

    ii.   Click on "Add Transporter (Figure 18)

    iii.   Click on Validate button after entering details in "GSTIN" column. All the details of the particular organization will be auto populated. (Figure 19)

    iv.   Fill in the required details and click on "Register" button.

Figure 19. Edit Organization section

Figure 20. Add Transporter section
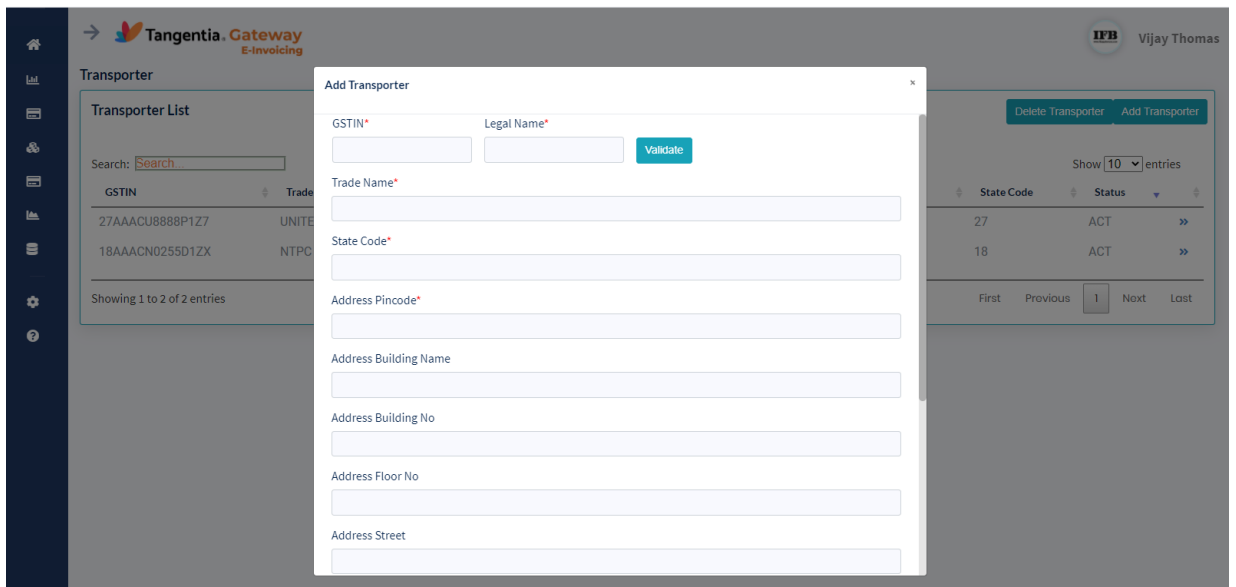
II.   Edit a Transporter

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i. Click on "Manage Transporter" under Settings.

ii. Select the required Transporter and click on double ankle bracket(Figure 20)

iii. Click on "Edit Transporter" (Figure 21)

iv. Edit all the required and click on Save button.(Figure 22)

v. A pop up appears "Organization Edited Successfully"

Figure 21. Manage Transporter section

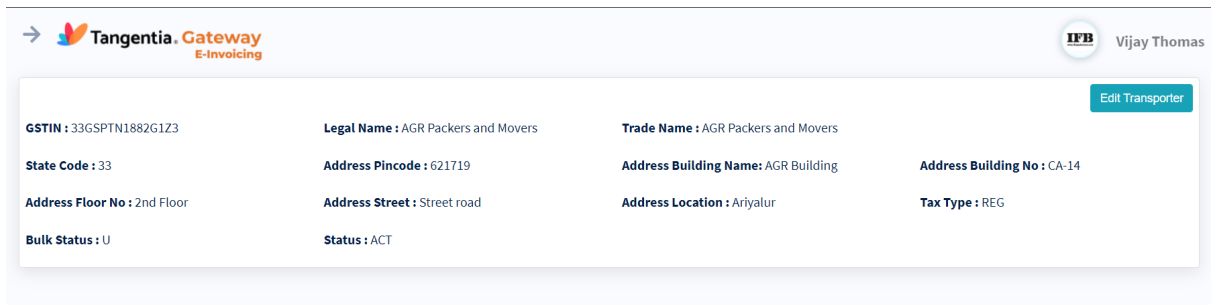Figure 22. Edit Transporter section
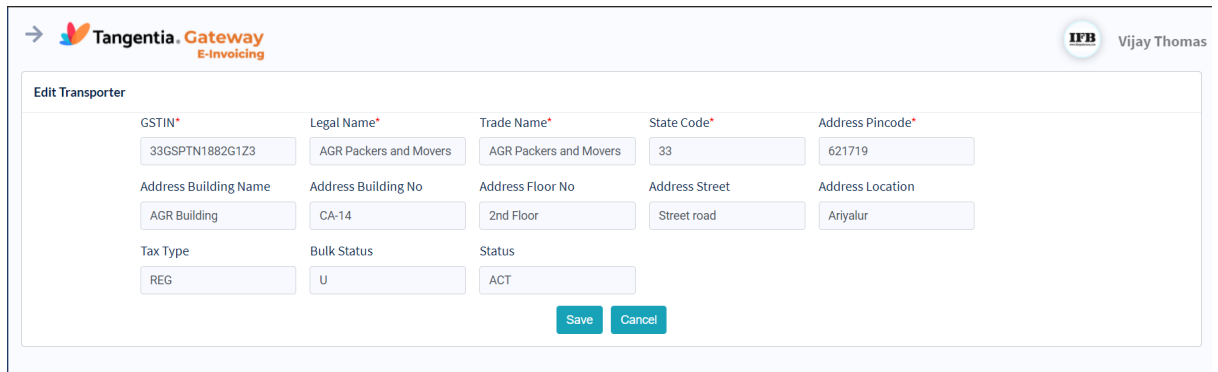
Figure 23. Edit Transporter details section
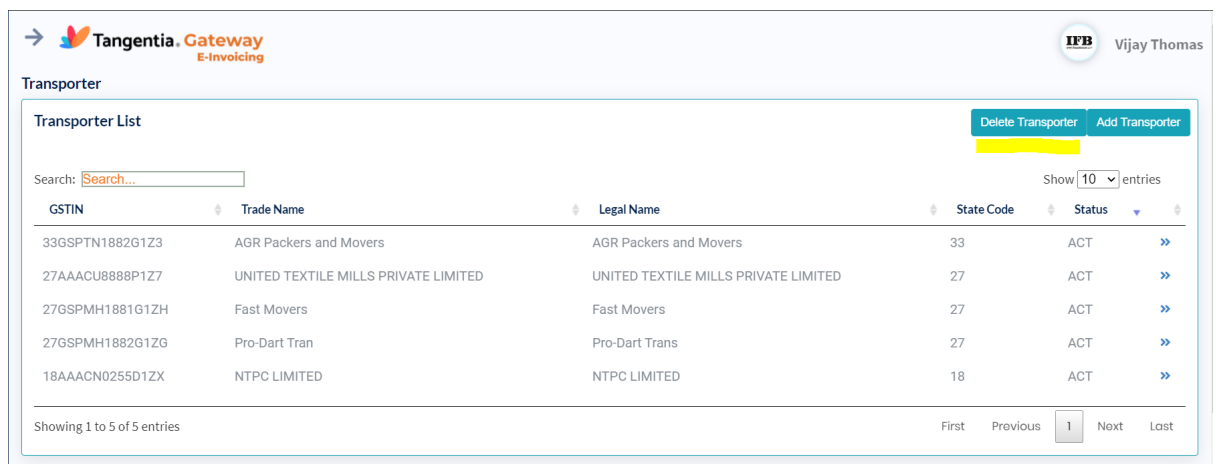
III. Delete a Transporter

i. Click on "Manage Transporter" under Settings.
ii. Select the Transporter to be deleted (Figure 23)
iii. Click on "Delete Transporter" and click on OK to confirm. (Figure 24)

Figure 24. Delete Transporter section

Figure 25. Confirm Delete Transporter section

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3. E-Invoice

3.1. E-Invoice Status

- **Yellow Dot** denotes that the E-Invoice has not been created or the IRN number/QR code for this particular invoice has not been generated.
- **Green Dot with tick mark** denotes that the E-Invoice has been created successfully with an IRN number and QR code.
- **Red Dot with hyphen sign** denotes that there is an error in the E-Invoice.

3.2. Creating a Sales E-Invoice

1. Click on "Billing & Payment" menu and select "E-Invoice" sub menu. (Figure 25)
2. Click on the "Create Invoice" button. A Create Invoice form opens. (Figure 26)

Figure 26. Billing and Payment menu
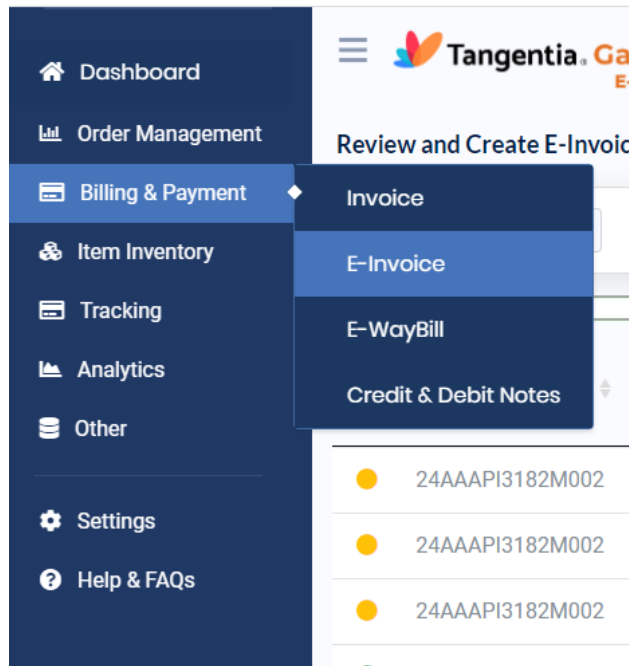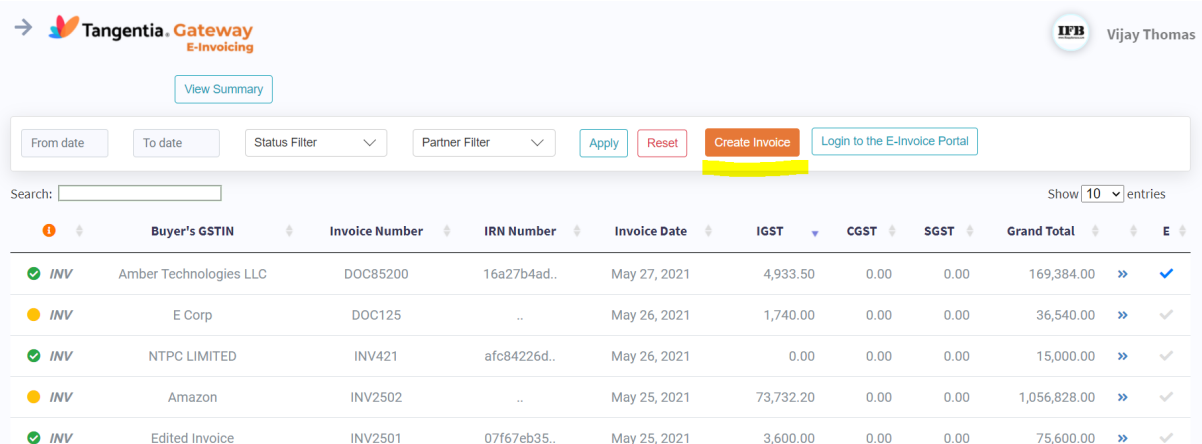
Figure 27. E-Invoice page

3. Fill in the details under Other Details. It contains following fields (*This feature is applicable only for selected customers)
    o   PO Number - Provide required details
    o   PO Date - Select the date

- Type Of Service – Provide required details
- MSME CertificateNo – Provide required details
- Date of Removal – Select the date
- Place of Supply – Provide required details
- Invoice ReferenceNo – Provide required details
- Lr No – Provide required details
- Vendor Code – Provide required details
- ECCI No – Provide required details
- Payment Terms – Provide required details

Figure I. Other Details Page

Figure 28. Billing and Payment menu

4. Fill in the details under Transaction Details. It contains following fields (Figure 27)
   - Seller's GSTIN - Auto populated
   - Seller's Name - Auto populated
   - Reg Rev – Select from the dropdown
   - Buyer's GSTIN – Auto populated once Buyer's Name is selected
   - Buyer's Name – Select from the dropdown provided
   - IGST On Intra – Select from the dropdown

5. Fill in the details under Document Details. It contains following fields (Figure 27)
   - Type - Select from the dropdown provided
   - Document No – Provide required details
   - Document Date – Select the date
   - Tax Scheme - Select from the dropdown provided
   - Supplier Type – Select "B2B" from the dropdown
   - ECM GSTIN – Provide Required details

6. Fill in the details under Dispatch Details. It contains following fields (Figure 27)
   - Same as Bill from address – Select the tick box if the address is same from bill and following fields need not be filled
   - Dispatch Name – Type in required details
   - Dispatch Address Line 1 – Type in required details
   - Dispatch Address Line 2 – Type in required details
   - Dispatch Location – Type in required details
   - Dispatch PIN Code – Type in required details
   - Dispatch State Code – Type in required details

7. Fill in the details under Ship Details. It contains following fields (Figure 28)
   - Same as Bill To Address – Select the tick box if the address is same from bill and following fields need not be filled
   - Select Bill To Address – If not the above method select Buyer Address from the dropdown and if found following fields need not be filled.
   - Ship To GSTIN – Type in required details
   - Ship To Legal Name – Type in required details
   - Ship To Trade Name – Type in required details

o   Ship To Address Line 1 – Type in required details

o   Ship To Address Line 2 – Type in required details

o   Ship To Location – Type in required details

o   Ship To PIN Code – Type in required details

o   Ship To State Code – Type in required details

Figure 29. Ship Details

8.   Fill in the details under Item Details. It contains following fields (Figure 29)

o   Service? – Do not check the checkbox, since it is a sales invoice

o   Description – Type in required details

o   HSN/SAC Code – Type in required details (minimum 6 digits)

o   UOM – Select from the drop down

o   Quantity – Type in required details

o   Unit Price – Type in required details

o   Discount (%) – Type in required details

o   GST Rate (%) - Type in required details

o   Other Charges – Add TCS amount in this field

Note: - Add the Freight and Package charges as a line items for which GST
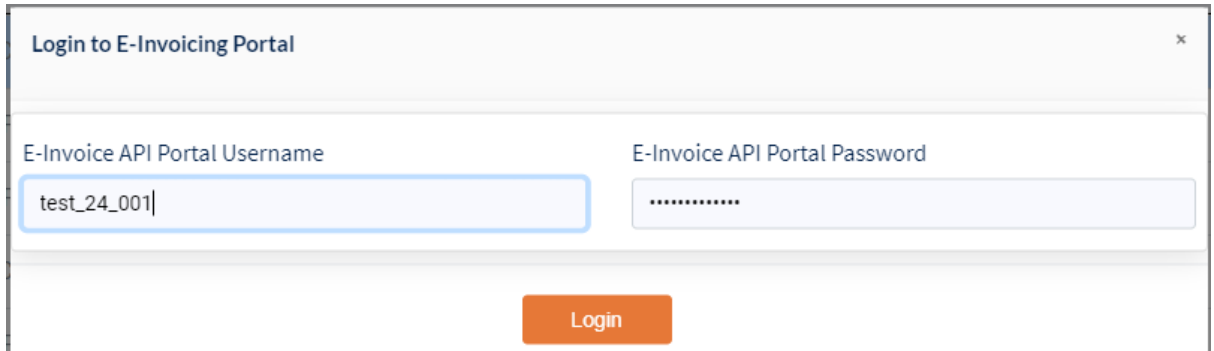Rate will apply if needed.

Figure 30. Item Details

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9.   Click on the 'Save Invoice' button once all these details are filled.

10. Upload an invoice into the IRP portal to generate an E-Invoice

   a.   Login to the IRP portal (Figure 30)
   b.   Fill in your registered API portal credentials in 'E-Invoice API Portal Username' and 'E-Invoice API Portal Password'.
   c.   Select the 'Not Yet Created' status invoice by selecting the invoice (Multiple Invoices can be selected)
   d.   Click on the "Select Action" drop down and then "Upload E-Invoices". (Figure 31)
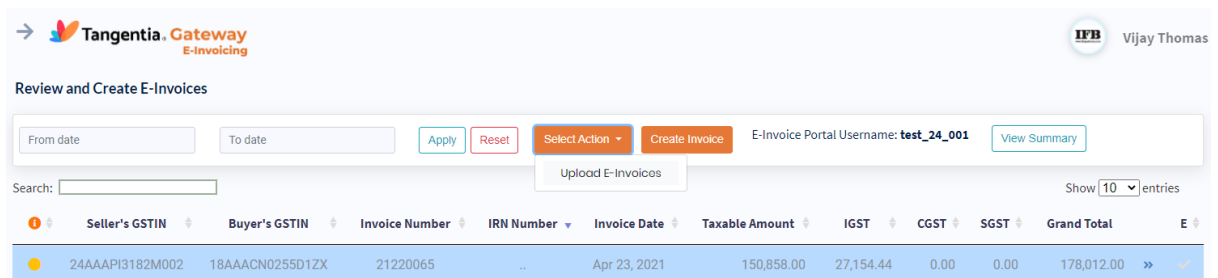
Figure 31. Item Details

Figure 32. Upload E-Invoice

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3.3. Creating a Service E-Invoice

All the above steps written in 3.2 section should be followed to create a service E-Invoice. Only the below step is changed.

1. Select the checkbox "Service?" under the Item Details. Select the checkbox for all the line items. (Figure 32)

   It contains following fields (Figure 29)

   - o Service? –check the checkbox, since it is a Service invoice
   - o Tax – Fill in the required details. (*This feature is applicable only for selected customers)
   - o Description – Type in required details
   - o HSN/SAC Code – Type in required details (minimum 6 digits)
   - o UOM – Select from the drop down
   - o Quantity – Type in required details
   - o Unit Price – Type in required details
   - o Discount (%) – Type in required details
   - o GST Rate (%) - Type in required details
   - o Other Charges – Add TCS amount in this field

Figure 33. Item Details box

3.4.Creating an Export E-Invoice

All the above steps written in 3.2 section should be followed to create a service E-Invoice. Only the below steps are changed.

1. Select the 'Supplier Type' under Document Details as "EXPWP or EXPWOP" i.e., "Export with payment or Export without payment".(Figure 33)

Figure 34. Document Details page
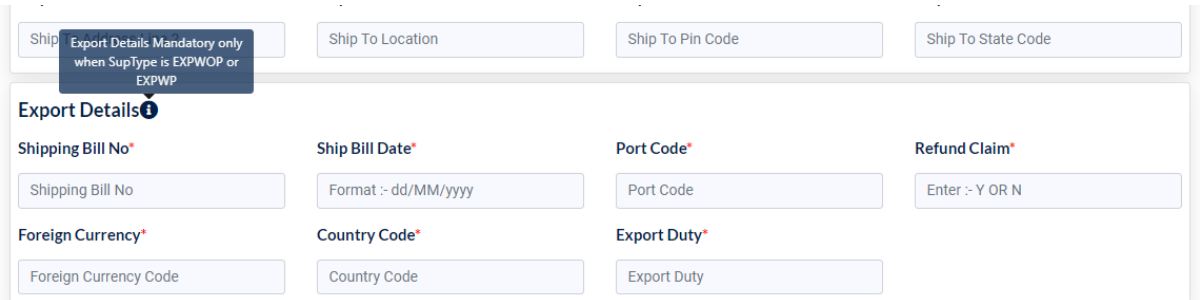
2. Fill in the following details in the Export Details section. (Figure 34)

o Shipping Bill No

o Ship Bill Date

o Port Code

o Refund Claim

o Foreign Currency

o Country Code

o Export Duty

Figure 35. Export Details

3.5.Print and Download of an E-Invoice

1. Click on "Billing & Payment" menu and select "E-Invoice" sub menu.
2. Select the required invoice and click on the double ankle bracket
3. User can print E-Invoice multiple ways: (Figure 35, Figure 36))
   a. Select "Print Invoice" from the "Select Action" dropdown
   b. Click on "Print Invoice" bottom at the bottom of the page
   c. Click on "Download Invoice" bottom at the bottom of the page

Figure 36. Print Invoice

Figure 37. Download Invoice

3.6. Creating Credit Notes

All the above steps written in 3.2 section should be followed to create a Credit Note. Only the below steps are changed.
1. Navigate to "Document Details"
2. Click on 'Type' dropdown and select 'CRN' (Figure 37)

Figure 38. Credit Notes

3.7. Creating Debit Notes

All the above steps written in 3.2 section should be followed to create a Credit Note. Only the below steps are changed.
3. Navigate to "Document Details"
4. Click on 'Type' dropdown and select 'DBN' (Figure 38)

Figure 39. Debit Notes

3.8.View Summary

1. Click on "Billing & Payment" menu and select "E-Invoice" sub menu
2. Click on 'View Summary' button (Figure 39)
3. Summary section will be displayed with required details. (Figure 40)

Figure 40. E-Invoice details page

Figure 41. Summary

3.9.View E-Way Bill

You can view E-Invoice Bill through different ways.

1. Click on "Billing & Payment" menu and select "E-Invoice" sub menu
2. Select any invoice and click on the double ankle bracket.
3. Invoice details will be displayed. (Figure 41)

Figure 42. View Invoice

3.10. Edit an E-Invoice

You can edit an Invoice only if its status is in 'Not Yet Created' or in 'Error' status.

1. Navigate to E-Invoice details page
2. Click on "Select Action" dropdown and click on Edit Invoice (Figure 42)
3. Required details can be edited in this page

Figure 43. Edit E-Invoice

3.11. Delete an E-Invoice

You can delete an Invoice only if its status is in 'Not Yet Created' or in 'Error' status.

1. Navigate to E-Invoice details page
2. Click on "Select Action" dropdown and click on Delete Invoice or Delete E-Way Bill (Figure 43)
3. Bill can be deleted from this page.

Figure 44. Delete E-Invoice

4. E-Way Bill

4.1. Creating an E-Way Bill

You can create E-Way Bill in multiple ways.

4.1.1. Creating an E-Way Bill under E-Invoice tab

1. Click on "Billing & Payment" menu and select "E-Invoice" sub menu. (Figure 44)
2. Click on the "Create Invoice" button. A Create Invoice form opens. (Figure 45)
3. Navigate to E-Way Bill Details
4. Click the checkbox under "E-Way Bill Details"
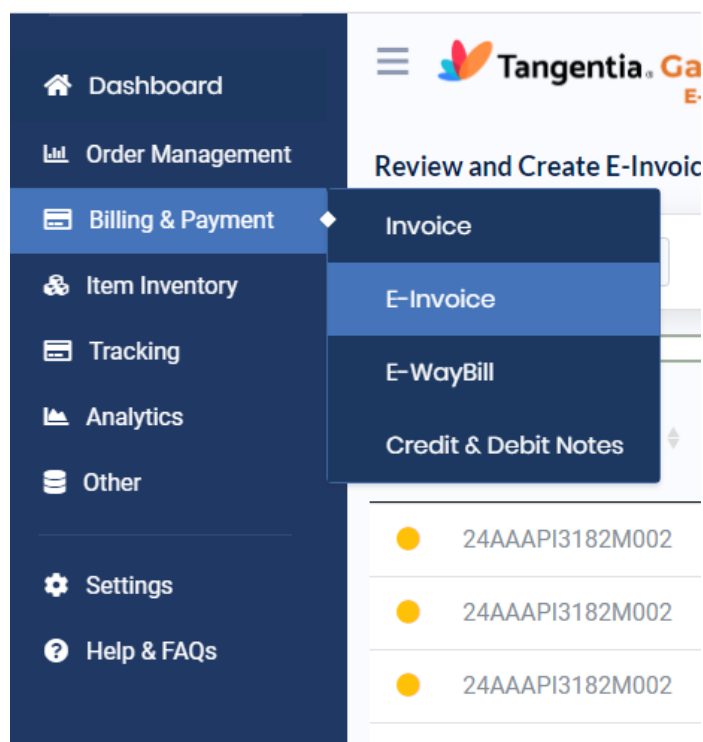
Figure 45. Billing and Payment menu

Figure 46. E-Invoice

5. Fill in the details under E-Way Bill Details. It contains following fields (Figure 46)

   o   Select Transporter Details – Select details from dropdown.

   o   Transporter ID(GSTIN) - Auto populated

   o   Transporter Name – Auto populated

   o   Transporter Document Number – Type in the document number

   o   Transporter Document Date – Auto populated

   o   Transporter Mode – Select from the dropdown

   ▪   If the Transporter Mode is selected as "Road" fill in the details of "Vehicle Number" and "Vehicle Type"

Figure 47. E-Way Bill Details

6. Upload E-Way Bill along with invoice into the IRP portal to generate an E-Invoice

    a. Login to the IRP portal
    b. Fill in your registered API portal credentials in 'E-Invoice API Portal Username' and 'E-Invoice API Portal Password' using. (Figure 47)
    c. Click on the "Select Action" drop down and then "Upload E-Invoices". (Figure 48)

Figure 48. Item Details
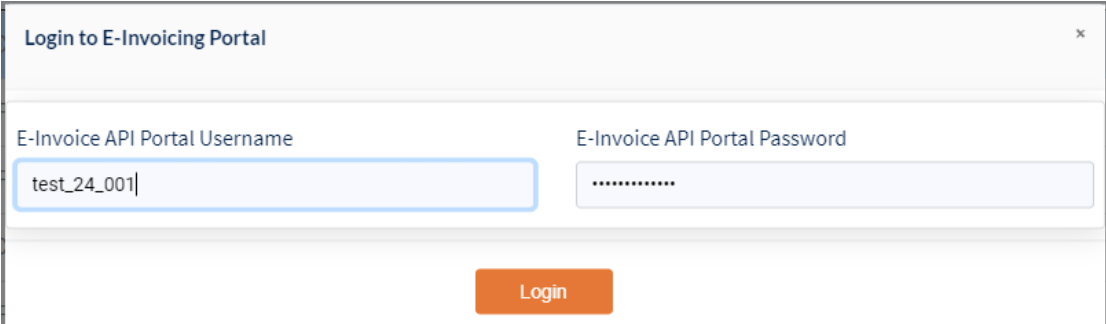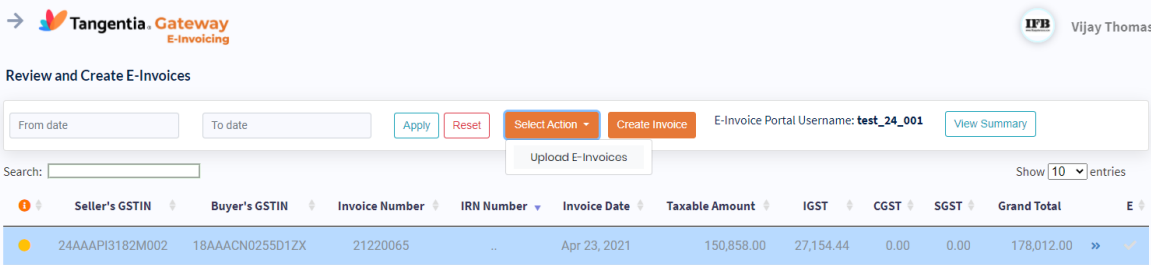
Figure 49. Upload E-Invoice

4.1.2. Creating an E-Way Bill under E-Invoice tab

1. Navigate to invoice details page
2. Select "Create E-Way Bill" under "Select Option" dropdown.
3. A pop up appears to fill in the details
4. Fill in the details and click on "Save"
5. E-Way bill is created
6. Upload E-Way Bill along with invoice into the IRP portal to generate an E-Invoice
    a. Login to the IRP portal
    b. Fill in your registered API portal credentials in 'E-Invoice API Portal Username' and 'E-Invoice API Portal Password' using.

c. Click on the "Select Action" drop down and then "Upload E-Invoices".

4.2. View E-Way Bill

You can view E-Way Bill through different ways.

4.2.1. View from E-Invoicing Listing page

1. Click on "Billing & Payment" menu and select "E-Invoice" sub menu
2. Check if there is a blue tick mark on the right-hand side of E-Invoice listed
3. Blue tick mark will be showed only if the E-Way Bill is attached with the E-Invoice.
4. Click on the blue mark
5. E-Way Bill details pops up on the screen (Figure 49)
6. E-Way Bill details pops up only if the Invoice is uploaded successfully to IRP portal.
7. Click on the E-Way bill number
8. You will be directed to the E-Way Bill details page

Figure 50. E-Way Bill Details

4.2.2. View from "E-Way" Bill tab

1. Click on "Billing & Payment" menu and select "E-Way Bill" sub menu. (Figure 50)
2. All details will be displayed in this page

Figure 51. View E-Invoice

4.2.3. View from E-Invoice" tab

1. Click on "Billing & Payment" menu and select "E-Invoice" sub menu.
2. Click on "List of E-Way Bill" dropdown and select E-Way Bill number (Figure 51)
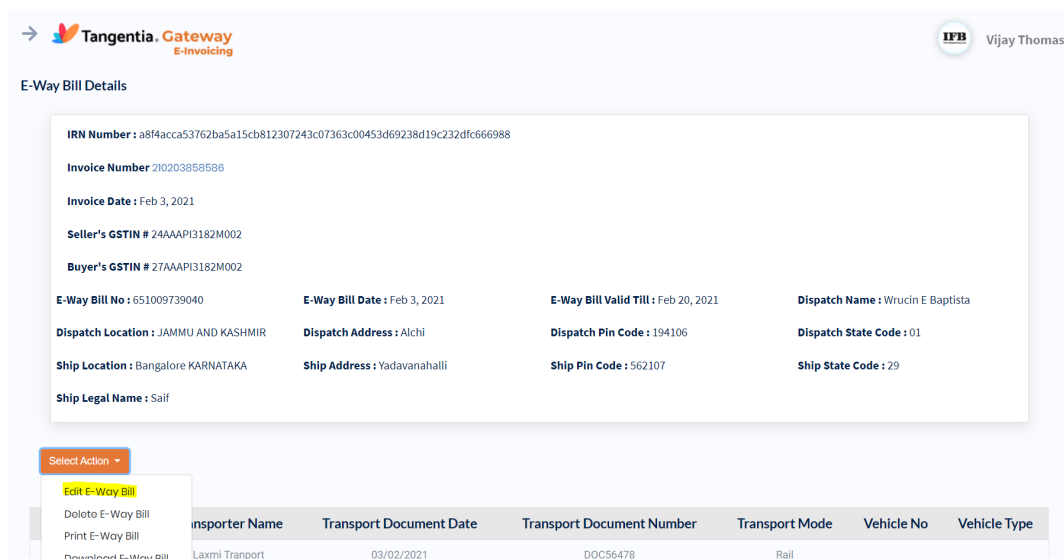3. All details will be displayed in this page

Figure 52. View E-Invoice

4.3.Edit an E-Way Bill

You can edit an E-Way Bill only if its status is in 'Not Yet Created' or in 'Error' status.

1. Navigate E-Way Bill details either from E-Invoice or E-Way Bill page
2. Click on "Select Action" dropdown and click on Edit Invoice or Edit E-Way Bill
3. Required details can be edited in this page

Figure 53. Edit E-Way Bill

4.4.   Delete an E-Way Bill

You can delete an E-Way Bill only if its status is in 'Not Yet Created' or in 'Error' status.

1. Navigate to E-Way Bill details page either from E-Invoice tab or E-Way Bill page
2. Select the E-Way Bill to be deleted
3. Click on "Select Action" dropdown and click on Delete E-Way Bill
4. Bill can be deleted from this page.

Figure 54. Delete E-Way Bill
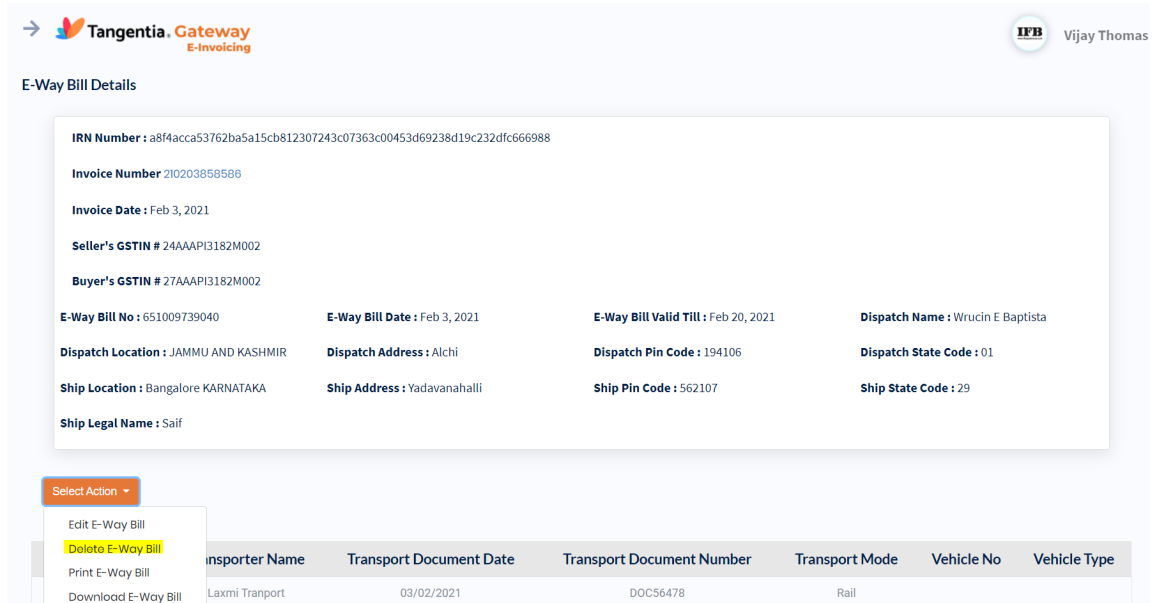
5. E-Invoice List

Figure 55. Delete E-Way Bill

5.1.Sales Invoice

You can create and view all the Sales Invoice in this Sales Invoice section.

5.1.1. View Sales Invoice

1. Click on "Einvoice List" menu and select "Sales Invoice" sub menu. (Figure 44)
2. All the sales invoices will be listed in this page
3. Click on double ankle bracket of an Invoice listed to view it in details.

5.1.2. Create a Sales Invoice

4. Click on "Einvoice List" menu and select "Sales Invoice" sub menu. (Figure 44)
5. Click on "Create Invoice" button
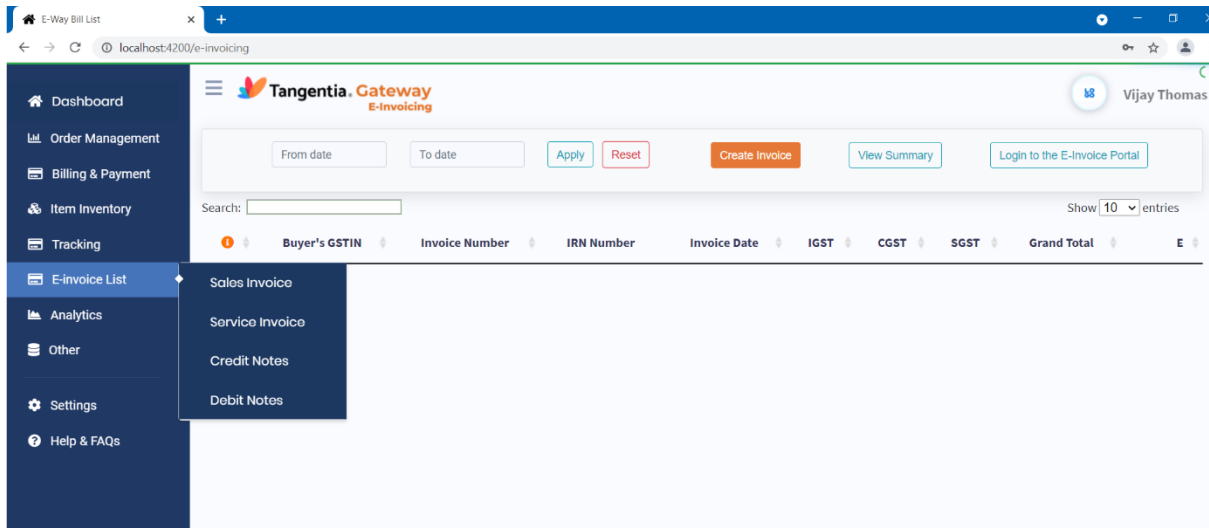6. "Type" field will be automatically selected as "Inv" under "Document Details" section.
7. Fill in the rest of the fields as mentioned in the section 2.2. (Refer 2.2)

Figure 56. Sales Invoice

5.2. Service Invoice

You can create and view all the Service Invoice in this Service Invoice section.

5.2.1. View Service Invoice

1. Click on "Einvoice List" menu and select "Service Invoice" sub menu. (Figure 44)
2. All the Service invoices will be listed in this page
3. Click on double ankle bracket of an Invoice listed to view it in details.

5.2.2. Create Service Invoice

1. Click on "Einvoice List" menu and select "Service Invoice" sub menu. (Figure 44)
2. Click on "Create Invoice" button
3. "Type" field will be automatically selected as "Inv" under "Document Details" section.
4. "Service?" checkbox under the "Item Details" will be checked by default.
5. Fill in the rest of the fields as mentioned in the section 2.2. (Refer 2.2)

Figure 57. Service Invoice

5.3.Credit Notes

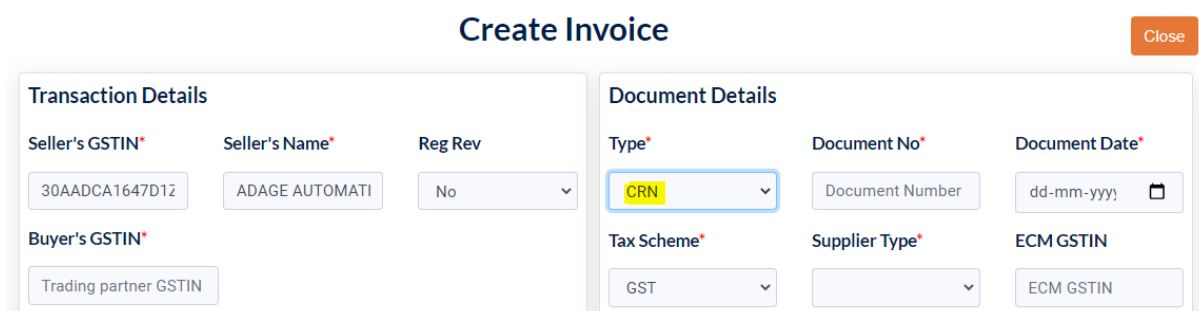You can create and view all the Credit Notes in this Credit Notes section.

5.3.1.   View Credit Notes

1. Click on "Einvoice List" menu and select "Credit Notes" sub menu. (Figure 44)
2. All the Credit Notes will be listed in this page
3. Click on double ankle bracket of an Invoice listed to view it in details.

5.3.2. Credit Notes

1. Click on "Einvoice List" menu and select "Credit Notes" sub menu. (Figure 44)
2. Click on "Create Invoice" button
3. "Type" field will be automatically selected as "CRN" under "Document Details" section.
4. Fill in the rest of the fields as mentioned in the section 2.2. (Refer 2.2)

Figure 58. Credit Notes

5.4.Debit Notes

You can create and view all the Service Invoice in this Debit Notes section.

5.4.1. View Debit Notes

1. Click on "Einvoice List" menu and select "Debit Notes" sub menu. (Figure 44)
2. All the Debit Notes will be listed in this page
3. Click on double ankle bracket of an Invoice listed to view it in details.

5.4.2. Create Debit Notes

1. Click on "Einvoice List" menu and select "Debit Notes" sub menu. (Figure 44)
2. Click on "Create Invoice" button
3. "Type" field will be automatically selected as "DBN" under "Document Details" section.
4. "Service?" checkbox under the "Item Details" will be checked by default.
5. Fill in the rest of the fields as mentioned in the section 2.2. (Refer 2.2)

Figure 59. Debit Notes