Export Declaration Form (EDF)

User Guide

Environment (Unit Login)

https://stpionline.stpi.in/

Document Control

Document Title	Export Declaration Form (EDF) – User Guide
Portal	STPI Portal – Unit Login

1. Introduction

1.1 Purpose

This User Guide provides step-by-step instructions for using the Export Declaration Form (EDF) module of the STPI portal. It describes the complete procedure, from logging in to the portal through the creation, submission and digital signing of an EDF, to the download of the digitally signed document after approval by STPI.

1.2 Scope and Intended Users

This guide is intended for Unit users who access the portal through the Unit Login. It covers the following activities:

- Accessing the portal and logging in.
- Opening the Export Declaration Form interface.
- Adding Contract Details and Bank Details.
- Creating a new EDF and uploading invoice details using a CSV (Excel) file.
- Uploading invoices and contracts, and submitting the EDF,
- Downloading the EDF, applying the digital signature and uploading the digitally signed document.
- Viewing the status of the EDF and downloading the approved document.

2. System and Portal Overview

2.1 Portal Access

The EDF module is accessed through the Unit Login of the STPI portal. The details required for access are given below.

Item	Details
Environment	Unit Login
Portal URL	https://stpionline.stpi.in/
Login Credentials	User ID, Password and Captcha

2.2 Structure of the EDF Module

The EDF module is opened from the **Export** menu by selecting **Export Declaration Form**. The Export Declaration Form interface contains the following tabs.

Tab	Function
EDF Details	Create a new EDF request, upload invoice details, and submit the EDF.

Tab	Function
Contract Details	Create a new contract or agreement by entering the required details.
Bank Details	Add a new bank by entering the required details.

3. Step-by-Step Procedures

3.1 Accessing the Portal

1. Open a web browser.
2. Enter the portal URL https://stpionline.stpi.in/ in the address bar.
3. Log in to the Portal.

3.2 Opening the Export Declaration Form

1. Click **Export** in the navigation menu.
2. Select **Export Certification (EDF)**.

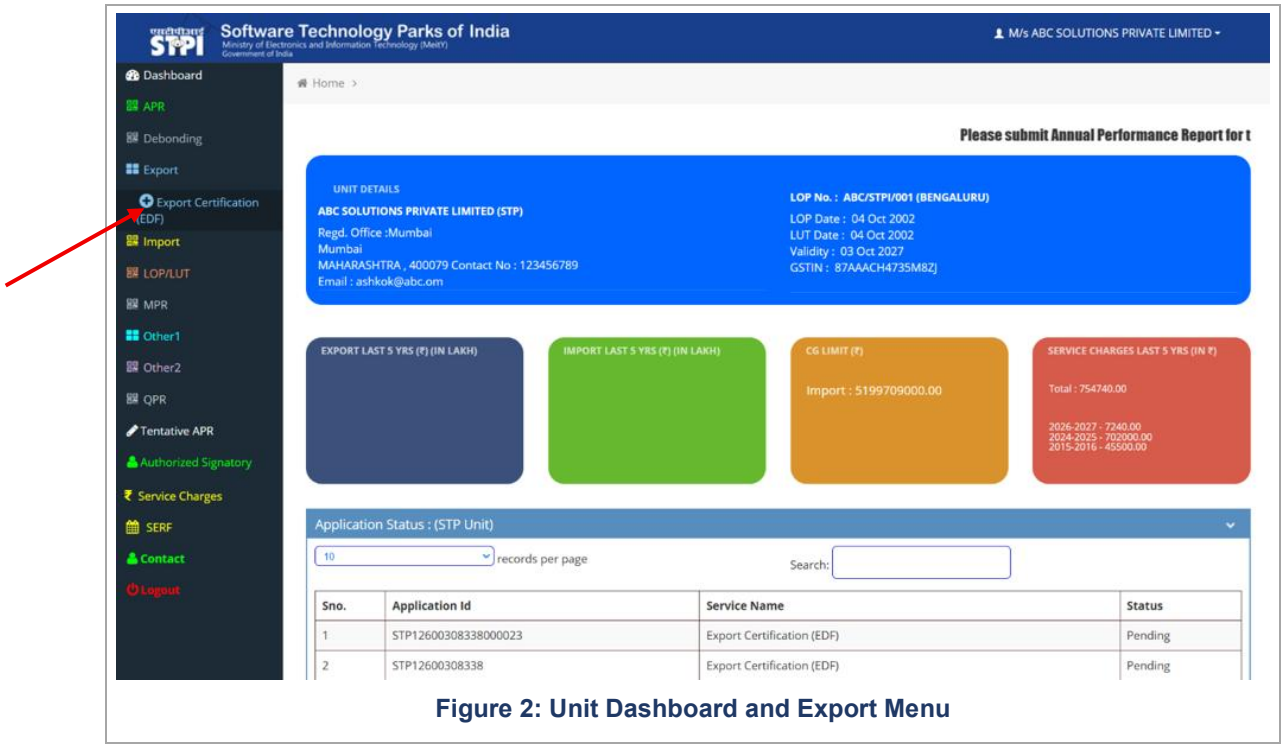


Figure 2: Unit Dashboard and Export Menu

The Export Declaration Form interface is displayed on the screen.

3.3 Adding Contract Details

1. Click the **Contract Details** tab.

2. Create a **New Contract** by entering the required details on the Add New Contract/Agreement screen.

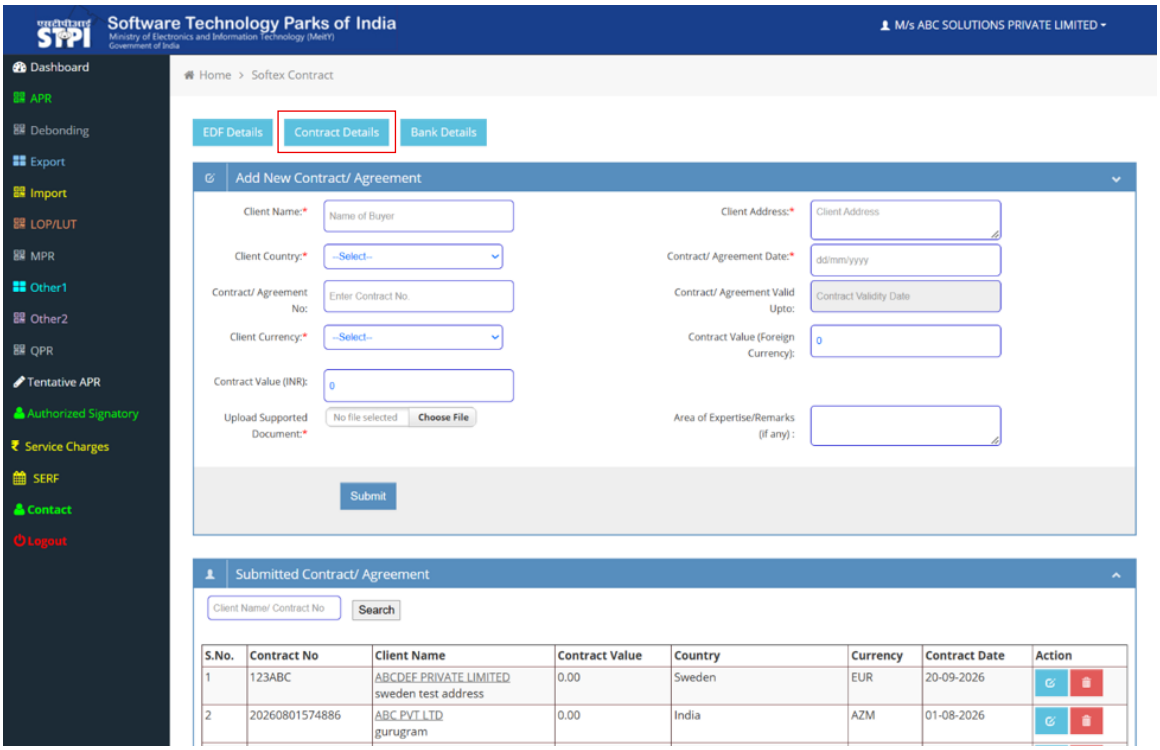


Figure 3: Add New Contract/Agreement Screen

3.4 Adding Bank Details

1. Click the **Bank Details** tab.
2. Add a new bank by entering the required details.

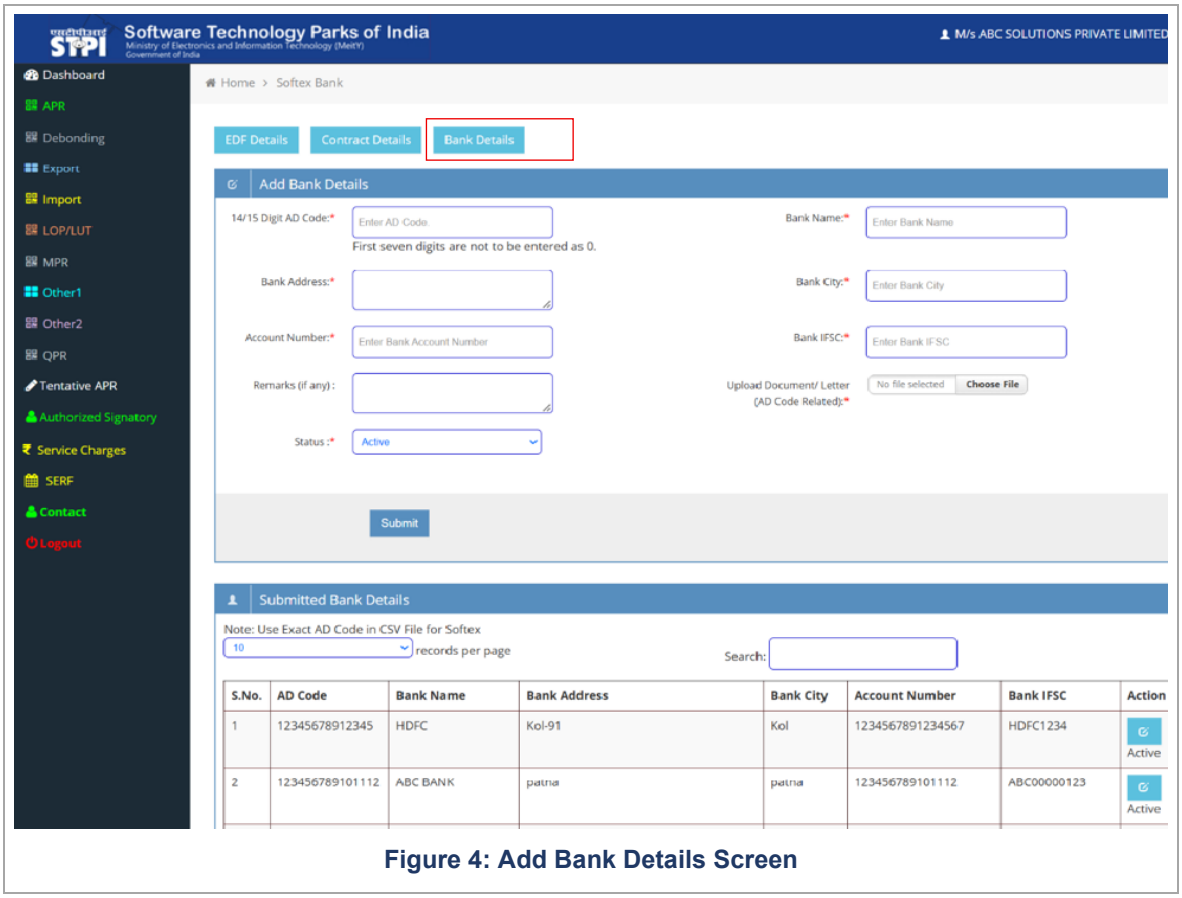


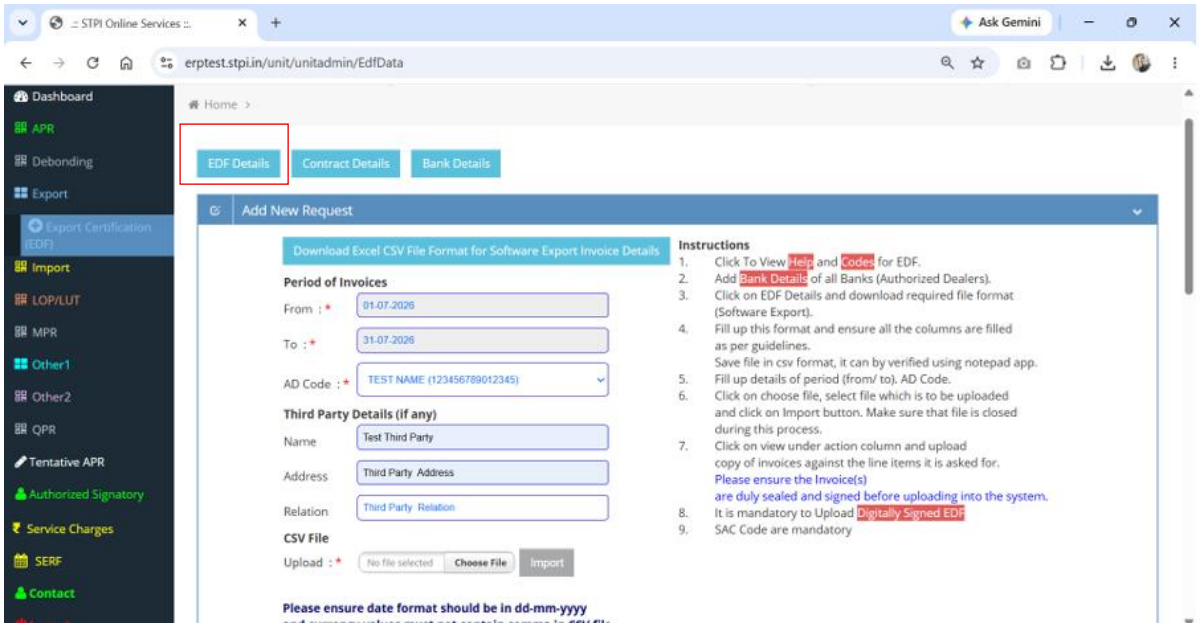
Figure 4: Add Bank Details Screen

4.5 Creating a New EDF

4.5.1 Entering the Request Details

To create a new EDF, perform the following actions:

1. Select the **Invoice Period**.
2. Select the **AD (Authorised Dealer)**.
3. Enter the **Third-Party Details** (optional).
4. Upload the **Invoice Details**.



4.5.2 Preparing the CSV (Excel) File

Download the CSV (Excel) file format as per the requirement and prepare the invoice details in it. Ensure that the numbers are in a proper number format, without commas and without scientific notation (for example, 2.5E+07).

If a value exceeds 12 digits (for example, an Invoice Number), prefix it with an apostrophe (') or any other special character so that it is recognised as text. This prevents Excel from converting the field to scientific notation.

Ensure that the columns shown in Figure 6 are present in the CSV (Excel) file.

Contract No.	Contract Number exactly as entered or generated through application	Optional
Contract Date	Date of Contract/ Agreement/ PO (dd/mm/yyyy)	Optional
Client Name *	Name of Buyer	Mandatory
Client Address *	Address of Buyer	Mandatory
Country Code *	Two chars country code as provided	Mandatory
Mode Of Realization *	Enter 3 only	Mandatory
Software Type	906 to 911	Optional
Description *	Brief description on Services Exports (Max 100 chars only	Mandatory
Invoice No. *	Invoice Number (Maximum 30 Chars)	Mandatory
Invoice Date *	Invoice Date (dd/mm/yyyy)	Mandatory
SAC Code *	6 Digit SAC Code	Mandatory
Currency Code *	Three chars currency code	Mandatory
Export Value *	Invoice Value (Foreign Currency)	Mandatory
Commission Amount	Commission Value (if any)	Optional
Deduction Amount	Deduction (if any)	Optional
Transmission Amount	Transmission Value (if any)	Optional
Export Value (INR) *	Converted Invoice Value Amount in INR	Mandatory

Figure 6: Required Columns of the CSV (Excel) File

4.5.3 Uploading the CSV (Excel) File

After the CSV (Excel) file is uploaded, a new request is generated with a **View** option, as shown in Figure 7.

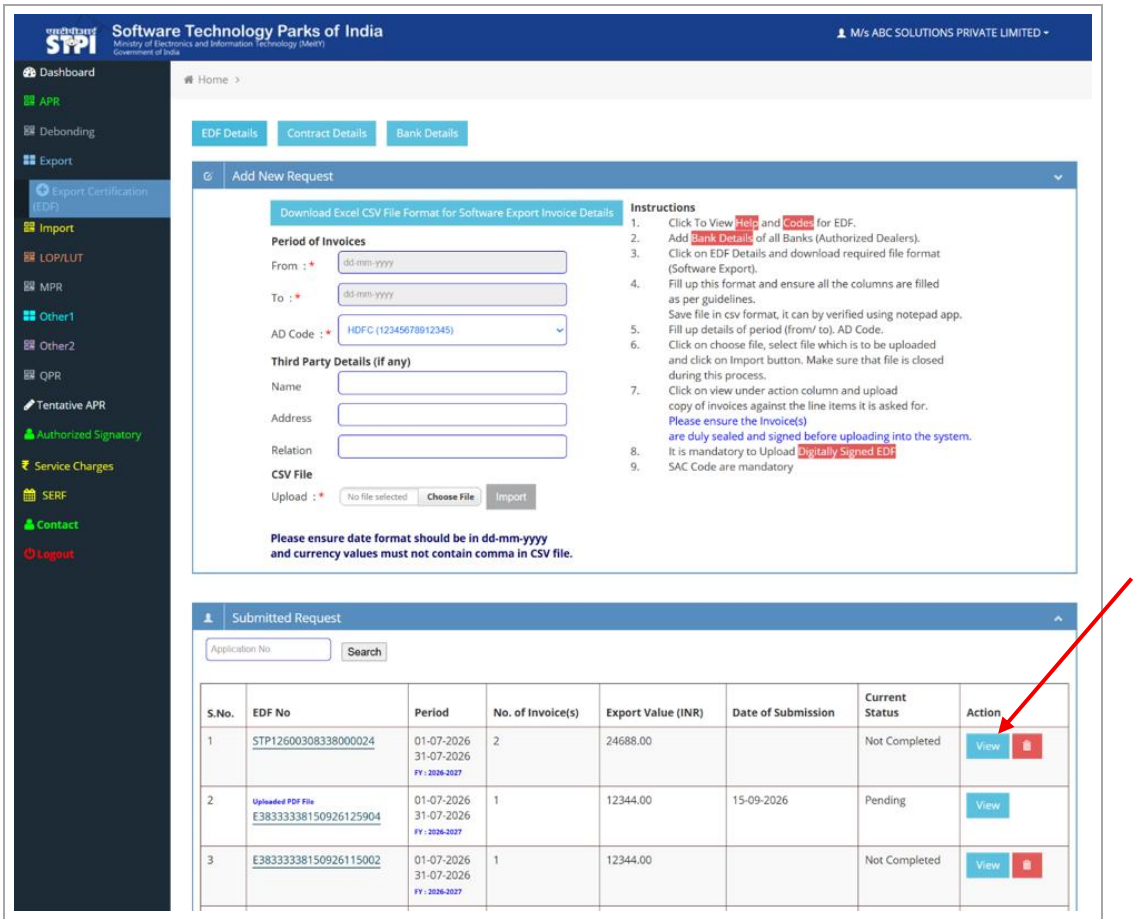


Figure 7: Submitted Request List with View Option

4.6 Uploading Invoice and Contract Details

4.6.1 Viewing the Invoice Details

1. Click **View** against the request. The Invoice Detail screen is displayed (Figure 8).
2. Upload the invoice and contract details for each line item for which a button is displayed in the **Action** column.

> **NOTE**
> If the contract or agreement has already been uploaded, it is not necessary to upload it again. In this case, click the action button and select or enter the contract number accordingly.

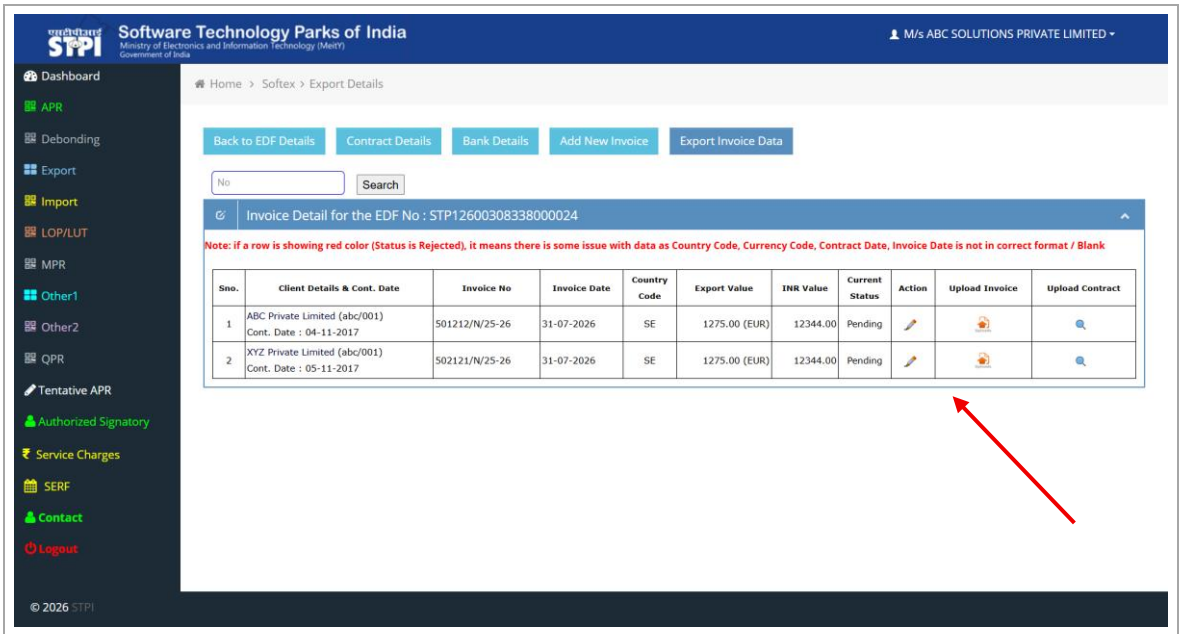


Figure 8: Invoice Detail Screen

4.6.2 Updating a Line Item

1. Click the **pen icon** in the **Action** column to update the particular line item. The update screen is displayed (Figure 9).
2. If the contract has already been uploaded to the system, select the exact contract number. The details are populated automatically.

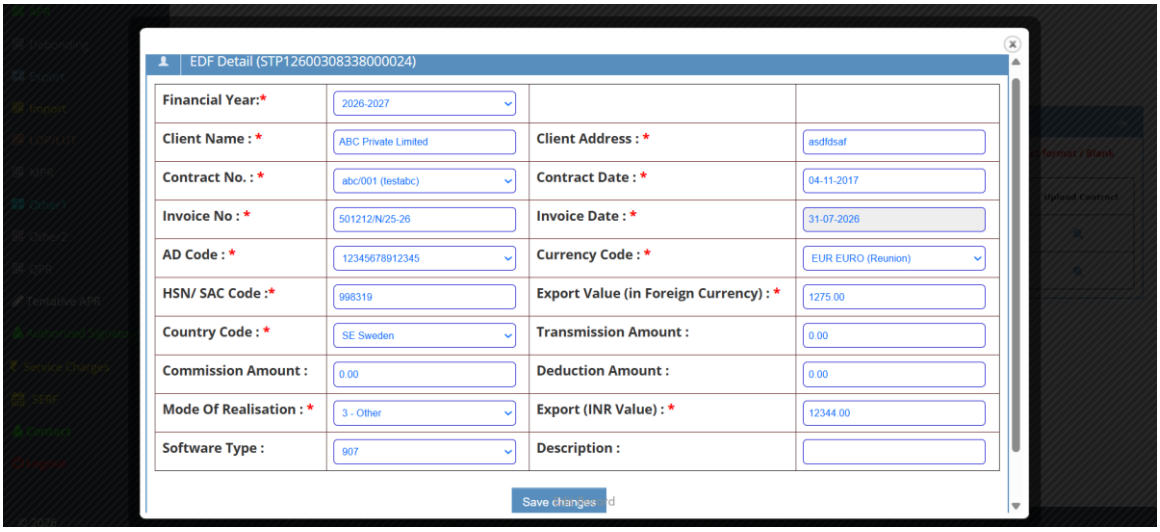


Figure 9: EDF Detail Screen for Updating a Line Item

4.6.3 Uploading the Invoice

Upload the corresponding invoice by clicking the Upload icon in the “Upload Invoice” column, as shown in Figure 10.

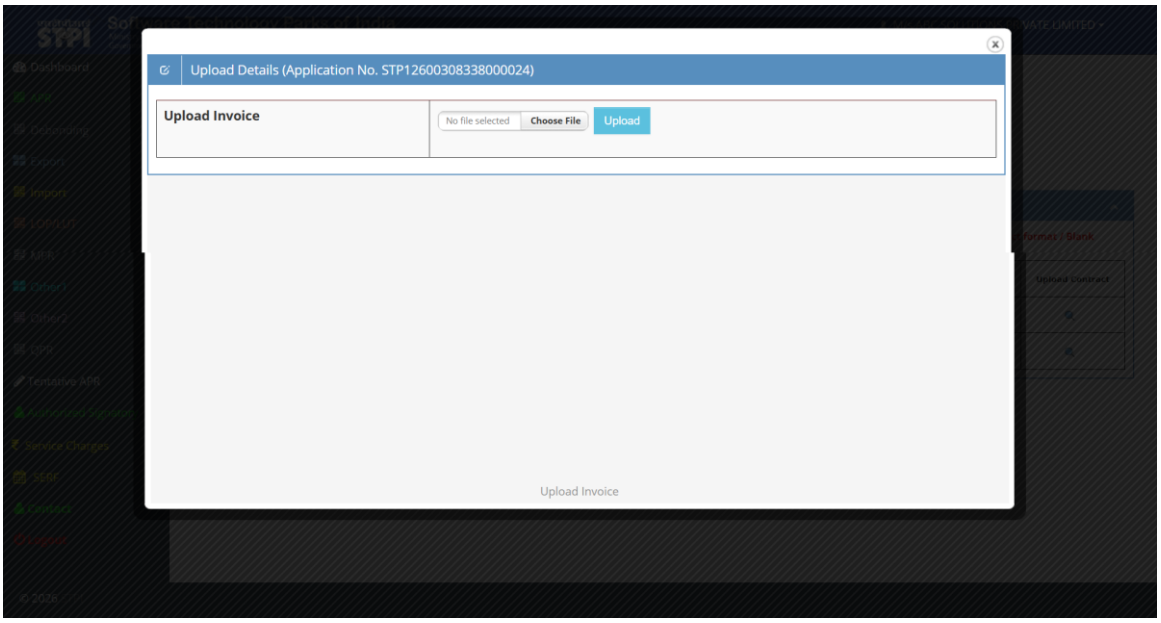


Figure 10: Upload Details Screen (Upload Invoice)

4.7 Submitting the EDF

1. After the selected invoices and contracts are uploaded, click the **Submit** button displayed in the EDF Details (Figure 11).
2. On the displayed screen, select the Unit location and other relevant details from which the export was made, as shown in Figure 12.

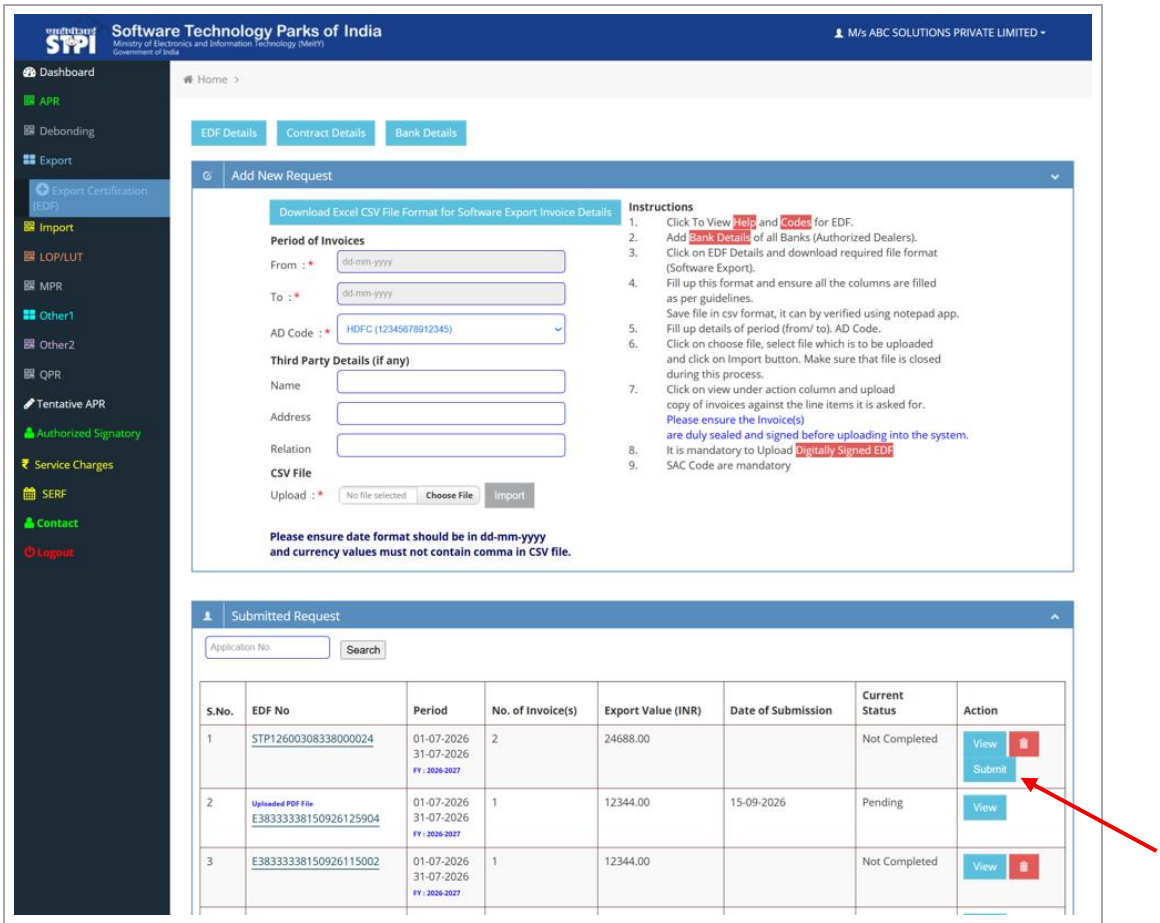


Figure 11: EDF Details Screen with Submit Option

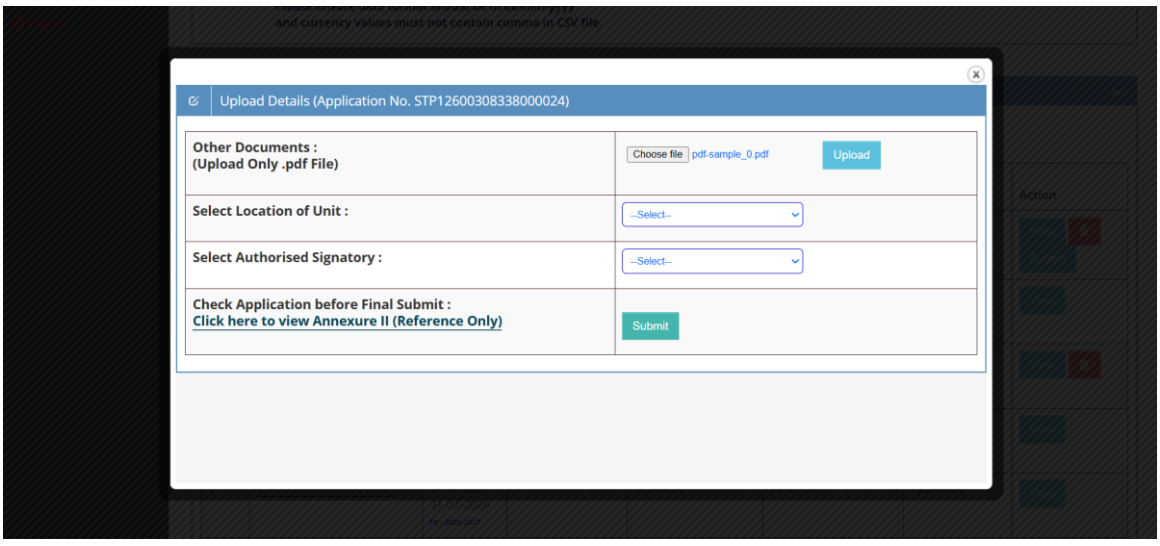


Figure 12: Selection of Unit Location

4.7 Uploading the Final Details

1. After the above details are submitted, the **Upload** button is displayed (Figure 13).
2. Click the **Upload** button to upload the final details.

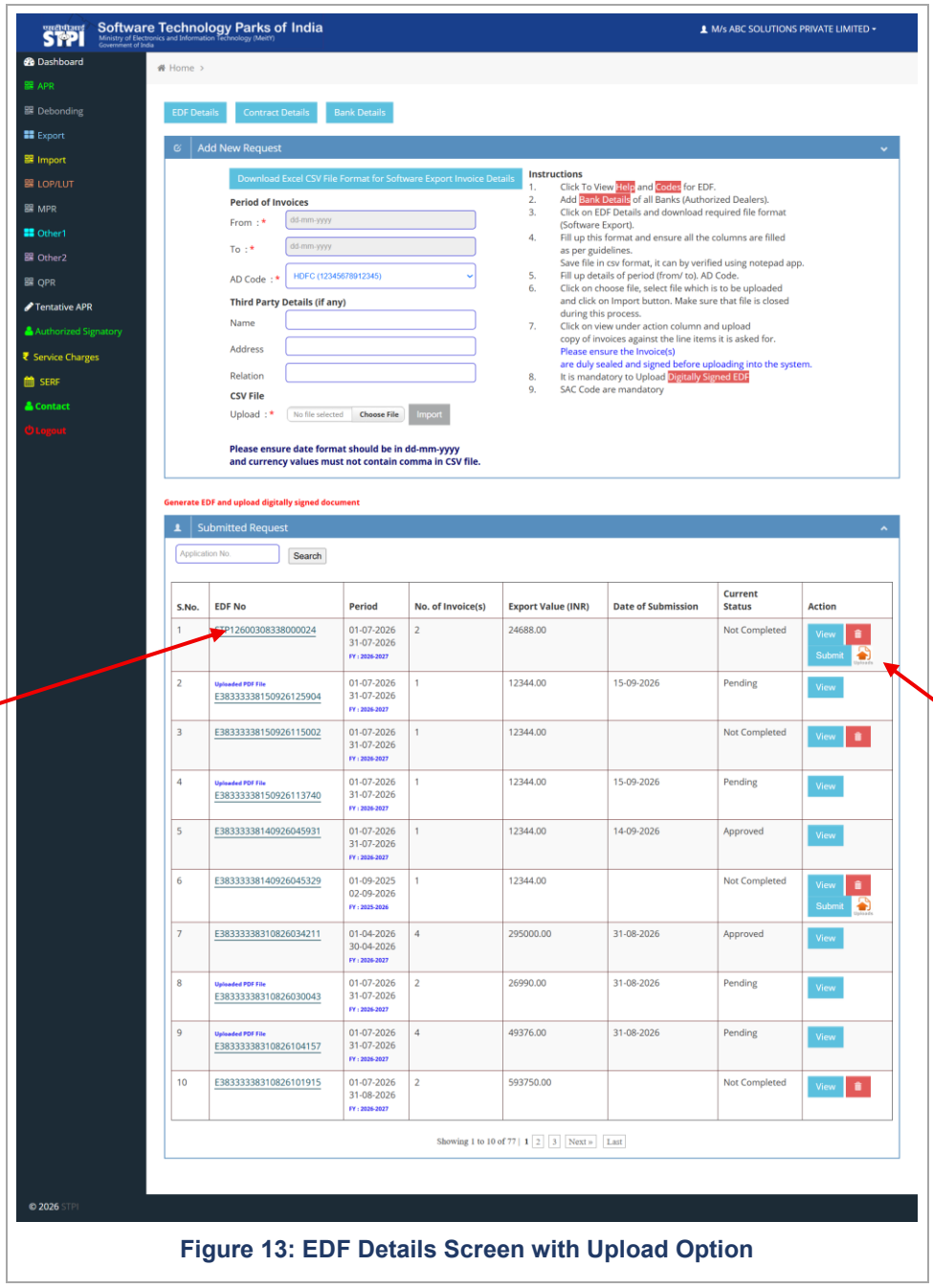
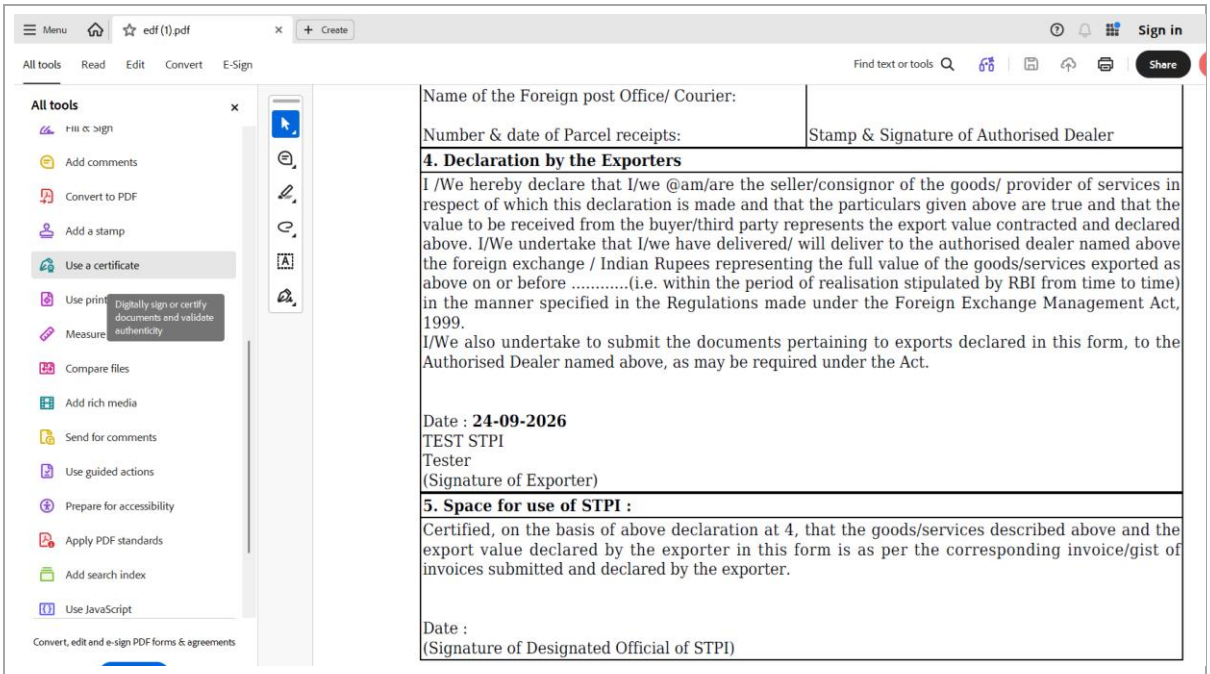


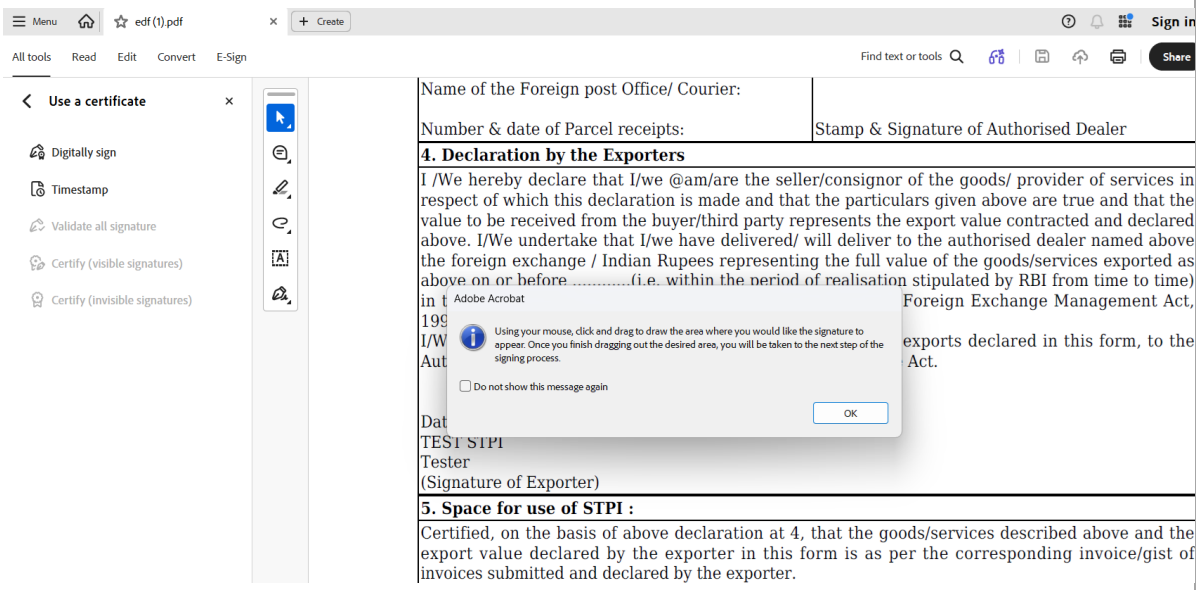
Figure 13: EDF Details Screen with Upload Option

4.8 Downloading and Digitally Signing the EDF

1. Click the **EDF Number**. A PDF file is generated.
2. Download the PDF file.
3. Go to the last page of the EDF (Section C). A box is displayed for the digital signature.
4. Click the box and add the digital signature of the Unit.



Select Use a Certificate menu in Adobe Acrobat Reader



Using mouse the area can be define where DS will get print

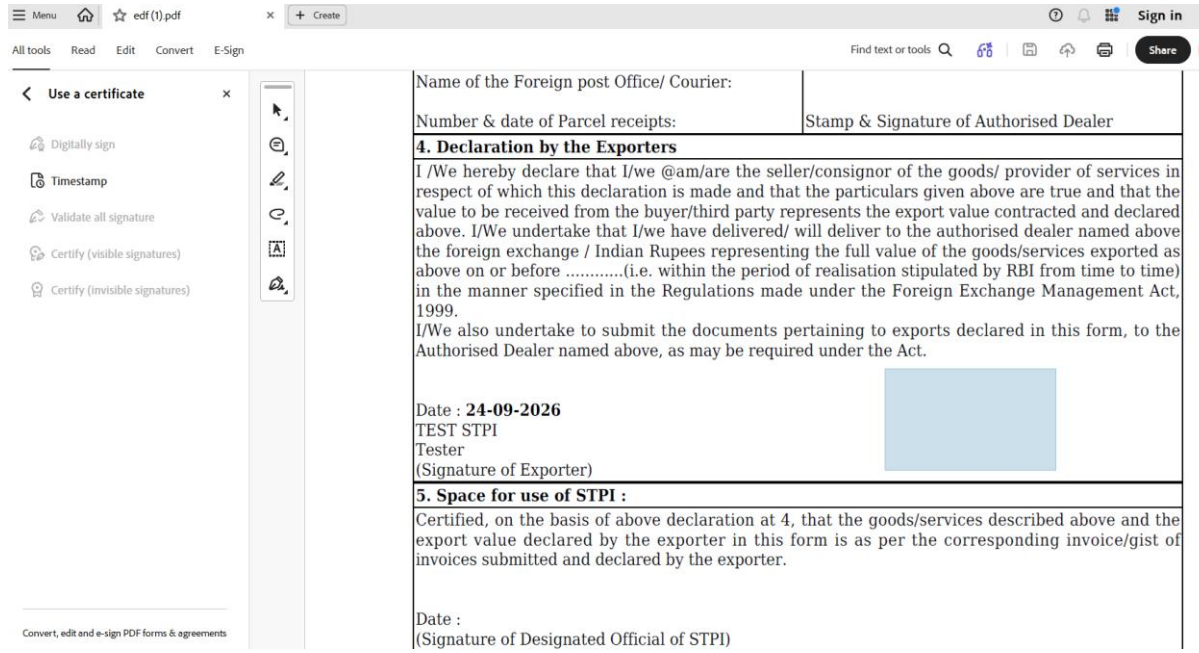


Figure 14: Digital Signature Field in Section C of the EDF

IMPORTANT

Use the latest version of Adobe Acrobat Reader DC to sign the document. Ensure that the locking mode of the document is unchecked or disabled during the signing process, to enable countersigning of the document.

4.9 Uploading the Digitally Signed EDF

1. Click the **upload icon** in the EDF list (Figure 13). The Upload Digitally Signed Document screen is displayed (Figure 15).
2. Upload the digitally signed PDF document.

WARNING

Upload the digitally signed PDF document in unlock mode.

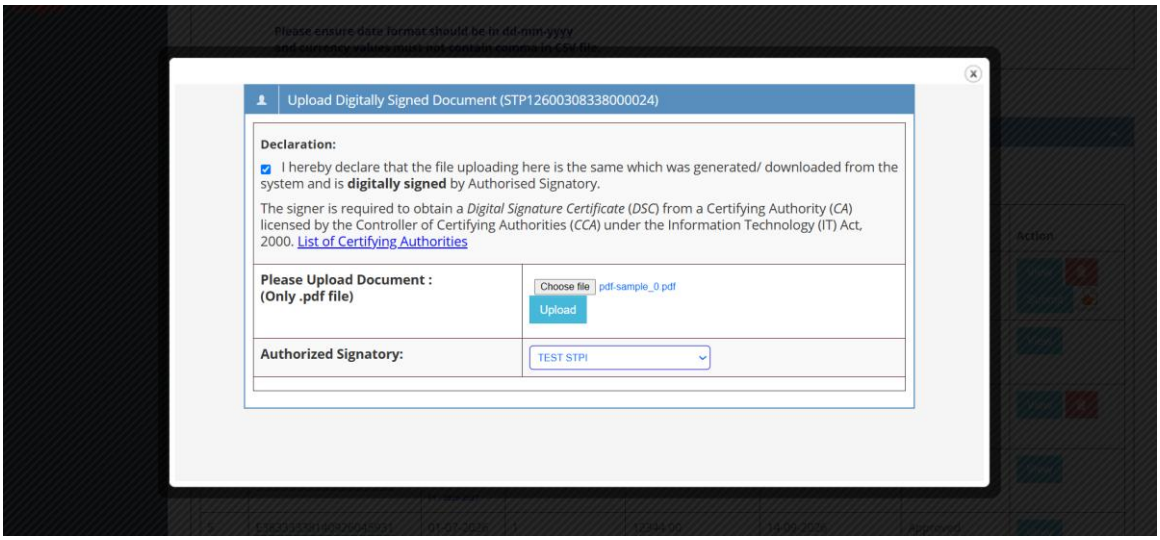


Figure 15: Upload Digitally Signed PDF Screen

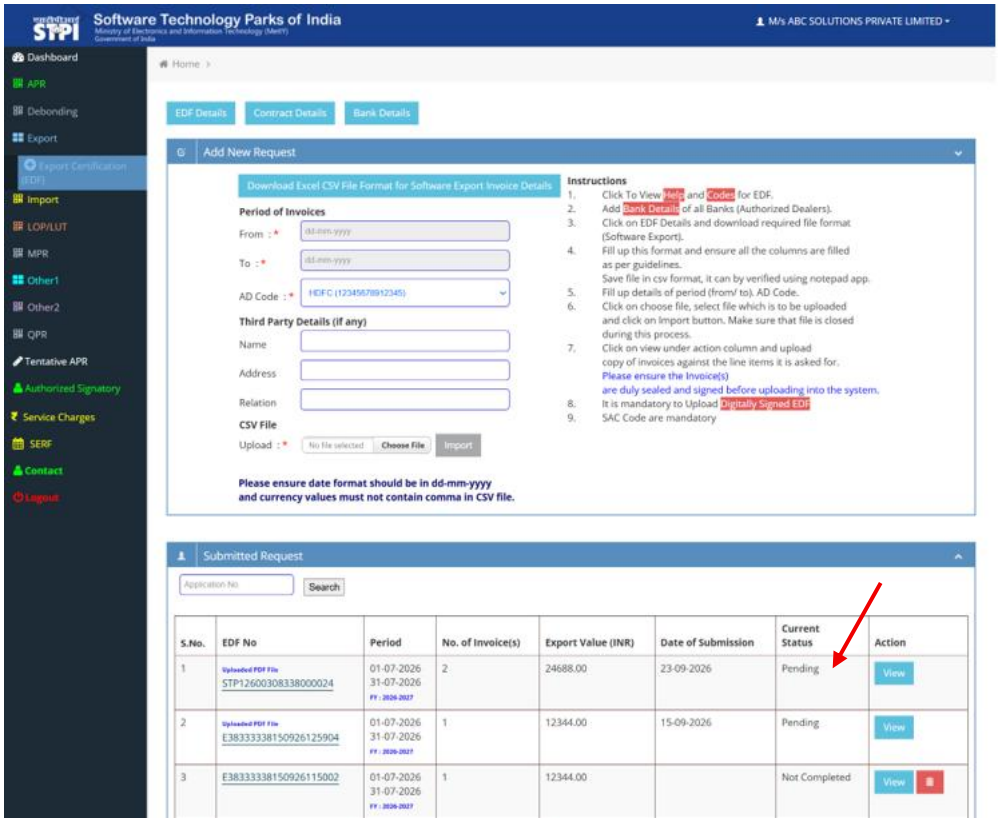
4.10 Final Submission

1. Click **Final Submit**.

The date of submission of the EDF is updated.

4.11 Downloading the Approved EDF

After approval by STPI, the duly digitally signed document may be downloaded from the EDF list, as shown in Figure 16.



5. Status and Approval Information

5.1 Submission Status

After submission, the status is displayed as **Pending**. This indicates that the submission was successful and that the EDF is awaiting approval.

5.2 Status Reference

The following statuses are displayed on the portal screens (Figure 8 and Figure 16).

Status	Description
Pending	The submission was successful and is awaiting approval.
Approved	The EDF has been approved by STPI. The duly digitally signed document may be downloaded.
Rejected (line item)	A row shown in red colour on the Invoice Detail screen indicates an issue with the data, such as a Country Code, Currency Code, Contract Date or Invoice Date that is in an incorrect format or is blank.