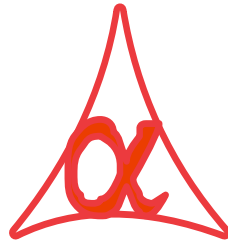




**POWER OF SIMPLICITY**

## **WhatsApp Message Module – 1.0**



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Version: Alpha Automation Pvt. Ltd. /WhatsApp Message Module/1.0/ Sep - 2019

## **WhatsApp Message Module – 1.0**

### **Introduction**

- This Module facilitates the user to send Whatsapp Message from Tally for All Voucher Types (Sales, Delivery Note, Sales Order, Purchase, Goods Receipt Note, Purchase Order, Material In, Material Out, Credit Note, Debit Note, Payment and Receipt).

### **Highlights:**

- Single Module to send Whatsapp Messages for All Voucher Types with Flexibility to Choose Message Content as per User Requirement.
- User can choose Existing Field of Ledger Master (Phone Number., Mobile Number or Fax Number) or create New Field to store the Whatsapp Number of the Ledger.
- User can enter the required message text in each Voucher Type.
- User can select whether to include or Not Party Name, Voucher Number & Date, Voucher Amount, Closing Balance, Own Company Name in all Voucher Types message.
- User can select whether to include or Not LR Details (LR No. Despatch through, Destination) in Sales and Delivery Note message.
- User can select whether to include or Not Inventory Details (Item Name & its Quantity) in Sales, Delivery Note, Sales Order, Purchase, Goods Receipt Note, Purchase Order, Material out, Material in, Credit note and Debit Note message.
- User can select whether to include or Not Bank Details (Instrument No., Instrument Date, Bank Name, Transaction Type) in Payment and Receipt Voucher Whatsapp message.

#### **Important!**

[As a best practice it is advisable to back up your company data](#)

**Installation**

1. Copy the TCP file in Tally.ERP9 Folder.
2. Gateway of Tally → F12→ Product & Features → F4 (Manage Local TDL) → Select Yes in Load TDL on Start up and give the file name of TCP File. After pressing the Enter Key will show TDL Status which should be Active.

**System requirements:**

No additional hardware / software infrastructure is required for executing and operation this applications module.

## Setup Guide:

Go to **Gateway of Tally > F11: Features > Add-on Features**

Set **“Yes”** to the option **“Enable WhatsApp Module?”**

User can select Existing Field of Ledger Master or select to create New Field to store the Whatsapp Number of the Ledger in Ledger Master.

The screenshot shows the 'Add-On Features' window for 'Company: Maruti Infoways'. The 'Enable WhatsApp Module' option is set to 'Yes'. Below it, the 'Ledger Master field for Whatsapp Message' is set to 'Mobile No.'. A 'Whatsapp Contact Selection' dialog box is open, showing options: 'Fax No.', 'Mobile No.' (which is highlighted), 'New Field', and 'Phone No.'. At the bottom of the window, there is a footer with the text 'Click on Shop button to buy Add-Ons' and a navigation bar with buttons: 'F1: Accounts', 'F2: Inventory', 'F3: Statutory', 'F4: TSS', 'F5: Audit', and 'F6: Add-Ons'.

Company: Maruti Infoways

Add-On Features

Enable WhatsApp Module ? Yes

Ledger Master field for Whatsapp Message : **Mobile No.**

**Whatsapp Contact Selection**

Fax No.

**Mobile No.**

New Field

Phone. No.

*Click on Shop button to buy Add-Ons*

F1: Accounts F2: Inventory F3: Statutory F4: TSS F5: Audit F6: Add-Ons

## Detailed User Guide:

### 1. Ledger Master Setup

a) Go to Gateway of Tally → Accounts Info. → Ledger → alter

User has to enter Party Whatsapp number in the field which he has selected in F11 Add-on Features while Enabling the Whatsapp Module. If he has selected New Field then he will get new field as Whatsapp No in Ledger Master. User has to enter Whatsapp number without any Country Code if the Party is from India.

Tally.ERP 9

P: Print E: Export M: E-Mail O: Upload S: TallyShop G: Language K: Keyboard K: Control Centre H: Sup

**Ledger Alteration** **Maruti Infoways**

Name : <b>Allec Enterprise</b> (alias) :	<b>Total Opening Balance</b>	
	9,25,050.00 Dr	
	<b>Difference</b>	
	9,25,050.00 Dr	

Description :  
Notes :

Under : <b>Sundry Debtors</b> (Current Assets)	<b>Mailing Details</b>
Currency of ledger : ₹	Name : <b>Allec Enterprise</b>
Maintain balances bill-by-bill ? <b>Yes</b>	Address : <b>Opp: Rajpath Appt.</b>
Default credit period :	<b>202, Panchvati Main Road,</b>
Check for credit days during voucher entry ? <b>No</b>	<b>Nr. Shrinathji Towers,</b>
Specify credit limit :	<b>Ahmedabad</b>
	Country : <b>India</b>
	State : <b>Gujarat</b> Pincode :
	(Select the applicable state to calculate GST during voucher entry.)
	Contact person : <b>Mr. Kapil Nagori</b>
Inventory values are affected ? <b>No</b>	Phone no. : <b>9773457538</b>
	WhatsApp Contact : <b>9909993318</b>
	Mobile no. : <b>9825098442</b>
	Fax no. : <b>9909993317</b>
	E-mail :
	CC to (if any) :
	Website :
	Provide bank details ? <b>No</b>
	<b>Tax Registration Details</b>
	PAN/IT No. :
	Registration type : <b>Regular</b>
	GSTIN/UIN :
	Set/alter GST details ? <b>No</b>

**Opening Balance ( on 1-Apr-2017 ) :**

Q: Quit A: Accept D: Delete

Tally MAIN --> Gateway of Tally --> Accounts Info. --> Ledgers --> Ledger Alteration © Tally Solutions Pvt Ltd., 198

If the Party belongs to another country then a country code option is enabled, where user has to enter Country Code.

Tally.ERP 9		Maruti Infoways	
<b>Ledger Alteration</b> Name : Oudh Al Anfar Trading		<b>Total Opening Balance</b> 9,25,050.00 Dr Difference 9,25,050.00 Dr	
<b>Under</b> : Sundry Debtors (Current Assets)		<b>Mailing Details</b> Name : Oudh Al Anfar Trading Address : Country : UAE Contact person : Mr. Gultaq Phone no : 42539124 Country Code : 0097 Mobile no. : 008715136753296 Fax no. : 009742150587 E-mail : CC to (if any) : Website : Provide bank details ? No	
Currency of ledger : ₹ Pricing level applicable : Not Applicable Maintain balances bill-by-bill ? Yes Default credit period : Check for credit days during voucher entry ? No Specify credit limit : Inventory values are affected ? No		<b>Tax Registration Details</b> PAN/IT No. : Registration type : GSTIN/UIN : Set/alter GST details ?	
<b>Opening Balance ( on 1-Apr-2017 ) :</b>		<b>Accept ?</b> Yes or No	
<b>Q: Quit    A: Accept    D: Delete</b>			

## 2. Voucher Type Wise Message Setup

### Sales Voucher Type

- a) Go to **Gateway of Tally → Accounts Info. → Voucher Types → Alter → Sales**
- Set “Yes” to “Whatsapp Message?” set “Yes” to “Set Pre-defined Whatsapp Message?”

Voucher Type Alteration		Maruti Infoways	
Name : Sales			
<b>General</b>		<b>Printing</b>	
Select type of voucher : Sales		Print voucher after saving : ? No	
Abbreviation : Sale			
Method of voucher numbering : ? Automatic		Use for POS invoicing : ? No	
Use advanced configuration : ? No		Default title to print : TAX INVOICE	
Use effective dates for vouchers : ? No		Default bank : ICICI Bank	
Make this voucher type as 'Optional' by default : ? No		Default jurisdiction :	
Allow narration in voucher : ? Yes		Set/alter declaration : ? No	
Provide narrations for each ledger in voucher : ? No			
Enable default accounting allocations : ? No			
Set/Alter Default Accounting Entries : ? No			
WhatsApp Message : ? Yes			
Set Pre-Defined WhatsApp Message : ? Yes			

**b) Define the message as per following instructions.**

- User can type his own message to send in Whatsapp message.
- First Part of the messages will be looked like “Sample Text” displayed as below.
- User can select other details like Party Name, Vch No & Date, LR Details, Inventory Details, Closing Balance, Own Company Name to be included in the message or Not.

Message	
I - Message	: Invoice of Rs.
II - Insert Amount	: Yes
III - Message	: Generated.
Sample Text	: Invoice of Rs. 1000 Generated.
Include Party Name	? Yes
Include Vch No. & Date	? Yes
Include LR Details	? Yes
Include Inventory Details	? Yes
Include Closing Balance	? Yes
Include Company Name	? Yes



## Payment Voucher Type

- a) Go to Gateway of Tally → Accounts Info. → Voucher Types → Alter → Payment\*
- Set “Yes” to “Whatsapp Message?” set “Yes” to “Set Pre-defined Whatsapp Message?”

Voucher Type Alteration		Maruti Infoways	
Name : Payment			
<p><u>General</u></p> <p>Select type of voucher : Payment</p> <p>Abbreviation : Pymt</p> <p>Method of voucher numbering ? Automatic</p> <p>Use advanced configuration ? No</p> <p>Use effective dates for vouchers ? No</p> <p>Make this voucher type as 'Optional' by default ? No</p> <p>Allow narration in voucher ? Yes</p> <p>Provide narrations for each ledger in voucher ? No</p> <p>Enable default accounting allocations ? No</p> <p>Set/Alter Default Accounting Entries ? No</p> <p>WhatsApp Message ? Yes</p> <p>Set Pre-Defined WhatsApp Message ? Yes</p>		<p><u>Printing</u></p> <p>Print voucher after saving ? No</p>	

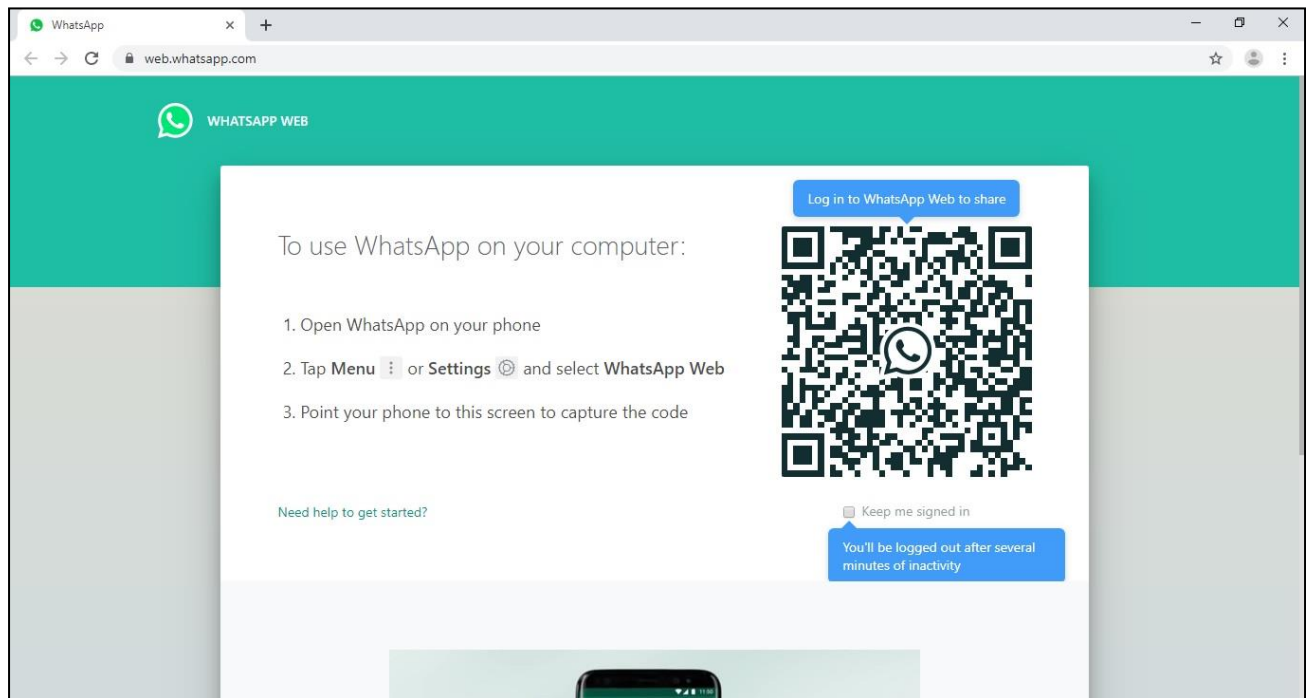
### c) Define the message as per following instructions.

- User can type his own message to send in Whatsapp message.
- First Part of the messages will be looked like “Sample Text” displayed as below.
- User can select other details as shown below to be included or not in the message.
- He can select Bank Details in Payment and Receipt Voucher Type.

Message	
I - Message	Payment of Rs.
II - Insert Amount	Yes
III - Message	Released.
Sample Text	Payment of Rs. 1000 Released.
Include Party Name	? Yes
Include Vch No. & Date	? Yes
Include Agst Ref. Details	? Yes
Include Bank Details	? Yes
Include Closing Balance	? Yes
Include Company Name	? Yes

### 3. Enabling the Whatsapp Web and Mapping with Phone Number

- Open web.whatsapp.com in your web browser.
- It will ask you scan QR Code from your phone.
- Open WhatsApp Web Menu from your Phone. It is available in Settings Menu of Whatsapp.
- Place the Scanning Part of the Phone to Web Browser Code Part to capture your Mobile Number. Once the Mobile Number is captured then it opens Whatsapp Operation Screen on your web browser.



## 4. Voucher Entry

### Sales Voucher

- Go to Accounting Vouchers and pass any sales entry. User will have an option to send Whatsapp Message.
- Select "Yes" to "Do you want to send Whatsapp Message?"

The screenshot shows the 'Accounting Voucher Alteration' window in Tally.ERP 9. The window title is 'Tally.ERP 9'. The menu bar includes: P: Print, E: Export, M: E-Mail, O: Upload, S: TallyShop, G: Language, K: Keyboard, K: Control Centre, H: Support Centre, H: Help. The window is titled 'Sales' and 'No. 1/19-20'. The date is '4 Sep-2019 Wednesday'. The reference number is 'Reference no.:'. The party name is 'Party A/c name : Allec Enterprise'. The current balance is 'Current balance : 48,092.40 Dr'. The sales ledger is 'Sales ledger : Sales'. The window is titled 'Maruti Infoways'. The window is titled 'Ctrl + M'. The window is titled 'F1: Accounting Vouchers, F2: Inventory Vouchers, F3: Order Vouchers, F4: Date, F5: Company, F6: Contra, F7: Payment, F8: Receipt, F9: Journal, F10: Sales, F11: Credit Note, F12: Purchase, F13: Debit Note, F14: Reversing Journal, F15: Memos, F16: Stock Query, F17: Tax Analysis, F18: Accounting Invoice, F19: As Voucher, F20: Post-Dated, F21: Optional, F22: Features, F23: Configure'. The window is titled 'Name of Item, Quantity, Rate per, Amount'. The items are: Assemble P7 (3 Nos, 10,500.00 Nos, 31,500.00), Assemble P8 (3 Nos, 1,560.00 Nos, 4,680.00), CGST (5,956.20), and SGST (5,956.20). The total amount is 48,092.40. The window is titled 'Narration: Do you want to send Whatsapp message? Yes'. The window is titled 'Yes / No, No, Yes'. The window is titled 'Quit, Accept, Delete, Cancel'. The window is titled 'Tally MAIN --> Gateway of Tally --> Accounting Voucher Alteration'. The window is titled '© Tally Solutions Pvt Ltd., 1988-2019, Mon, 9 Sep, 2019, 17:40:03'.

Name of Item	Quantity	Rate per	Amount
Assemble P7	3 Nos	10,500.00 Nos	31,500.00
Assemble P8	3 Nos	1,560.00 Nos	4,680.00
CGST			5,956.20
SGST			5,956.20
			48,092.40

Narration: Do you want to send Whatsapp message? Yes

Yes / No  
No  
Yes

Quit Accept Delete Cancel

Tally MAIN --> Gateway of Tally --> Accounting Voucher Alteration

© Tally Solutions Pvt Ltd., 1988-2019 Mon, 9 Sep, 2019 17:40:03

- Following screen will appear to user screen to confirm the mobile no and other details.

The screenshot shows the 'Message Details' window. The window is titled 'Message Details'. The window is titled 'Name : Mr. Kapil Nagori'. The window is titled 'Mobile No : 919825098442'. The window is titled 'Message : Allec Enterprise , Invoice of Rs. 48,092.40 Generated. (Invoice No. : 1/19-20 Dated :4-Sep-2019) (LR No. : LR-895 , Through : Golden Transport , Destination : Baroda) (Assemble P7: 3 Nos, Assemble P8: 3 Nos) (Closing Balance : 48,092.40 Dr) From : Maruti Infoways'. The window is titled 'Quit'. The window is titled 'Ctrl + N'.

Message Details

Name : Mr. Kapil Nagori

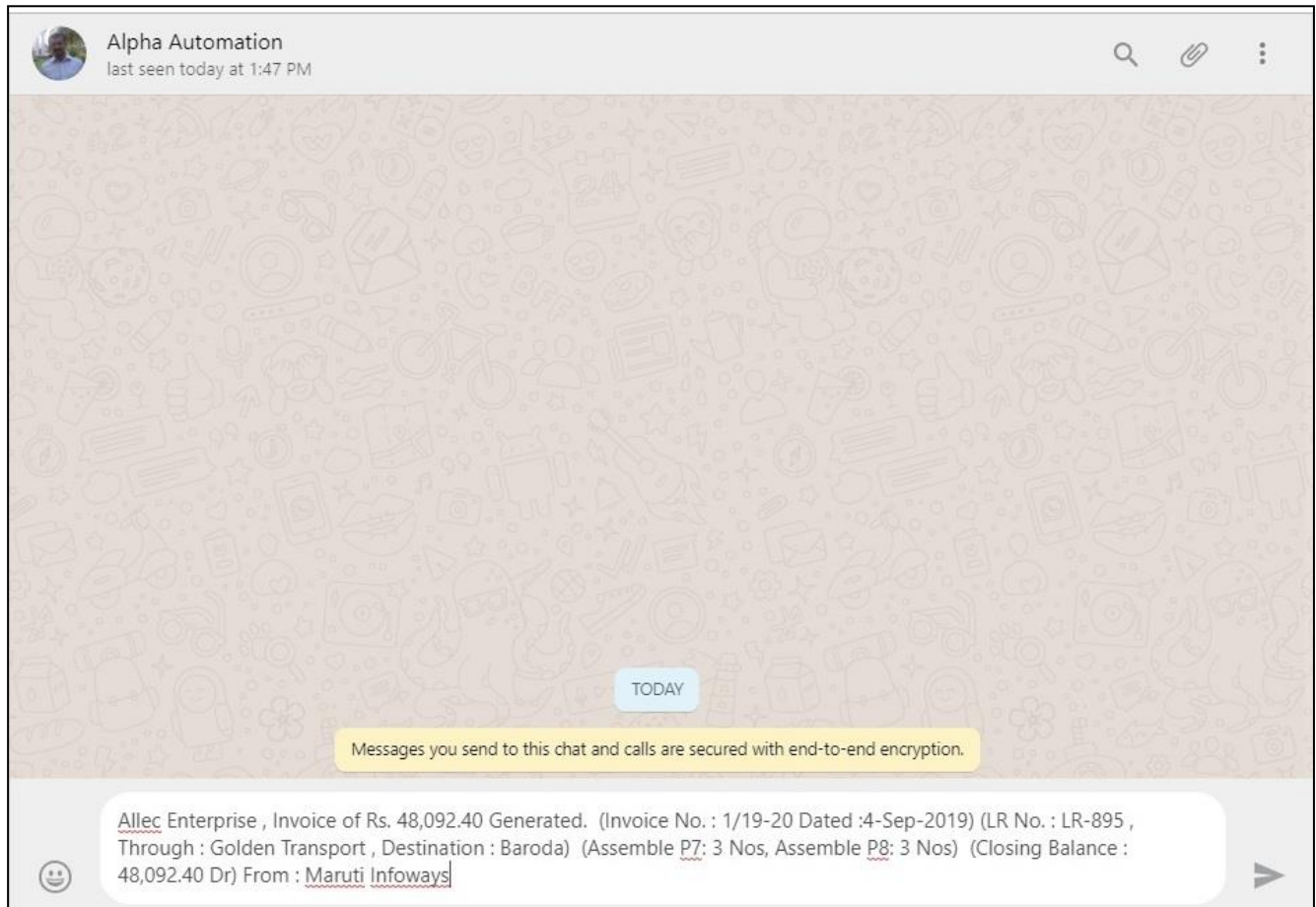
Mobile No : 919825098442

Message : Allec Enterprise , Invoice of Rs. 48,092.40 Generated. (Invoice No. : 1/19-20 Dated :4-Sep-2019) (LR No. : LR-895 , Through : Golden Transport , Destination : Baroda) (Assemble P7: 3 Nos, Assemble P8: 3 Nos) (Closing Balance : 48,092.40 Dr) From : Maruti Infoways

Quit

Ctrl + N

- d) The Message will be displayed on Web Whatsapp Page as shown below. Press Enter to send the message to the party.



## Payment Voucher

- Go to Accounting Vouchers and pass any Payment entry. User will have an option to send Whatsapp Message.
- Set "Yes" to "Do you want to send Whatsapp Message?"

The screenshot shows the Tally.ERP 9 Accounting Voucher Alteration screen. The voucher is a Payment Voucher for ABC Computer Services, dated 6-Sep-2019. The account is HDFC Bank with a current balance of 68,000.00 Cr. The voucher amount is 68,000.00. The screen includes a navigation pane on the right with various voucher types and a bottom status bar.

Particulars	Amount
ABC Computer Services Cur Bal: 1,00,410.00 Cr Agst Ref 1	68,000.00 Dr

Narration:

Do you want to send Whatsapp message? **Yes**

Yes / No  
No  
Yes

Q: Quit A: Accept D: Delete X: Cancel

Tally MAIN --> Gateway of Tally --> Accounting Voucher Alteration

© Tally Solutions Pvt Ltd., 1988-2019 Fri, 6 Sep, 2019 17:16:18

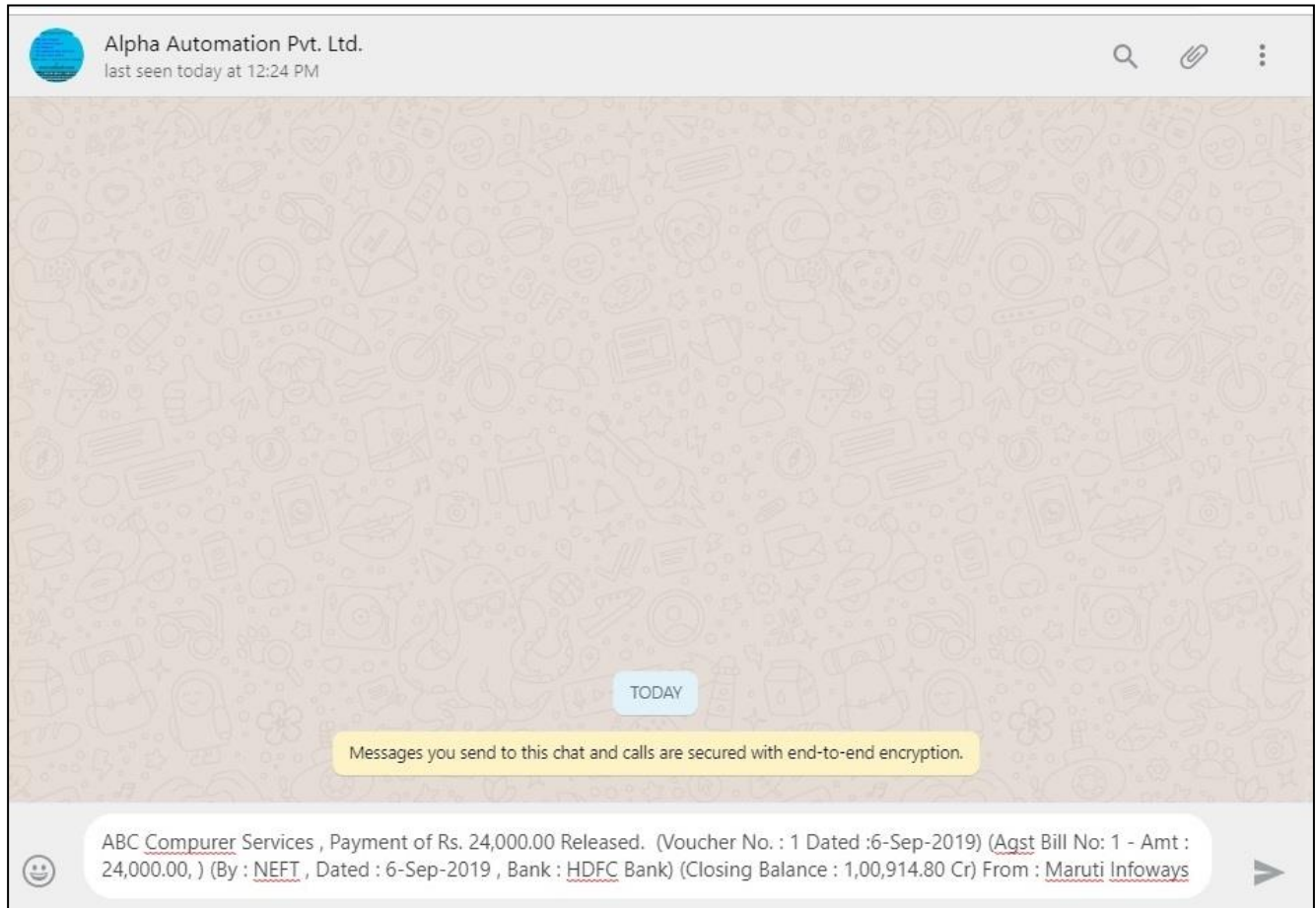
- Following screen will appear to user screen to confirm the mobile no and other details.

The screenshot shows the Message Details screen. It displays the name Mr. Bharat Barai, mobile number 919909993317, and the message text: ABC Computer Services, Payment of Rs. 24,000.00 Released. (Voucher No. : 1 Dated : 6-Sep-2019) (Agst Bill No: 1 - Amt : 24,000.00,) (By : NEFT, Dated : 6-Sep-2019, Bank : HDFC Bank) (Closing Balance : 1,00,914.80 Cr) From : Maruti Infoways.

Q: Quit

Ctrl + N

- d) The Message is ready as below to be sent to the customer on the web Whatsapp Page, press Enter the message is sent.



# FAQ

## **Which version/releases of Tally.ERP 9 does the add-on support?**

This add-on will work only with Tally ERP 9 Series A, release 5.1 onwards.

## **How will I get support for this add-on?**

For any functional support requirements please do write to us on [tddl@aaplautomation.com](mailto:tddl@aaplautomation.com) or call us at +91-288-2713956/57/58 or +91-9773457538 / 9099908115/ 9825098442.

## **If I need some enhancement / changes to be incorporated for the add-on, whom should I contact?**

Please to write to us on [tddl@aaplautomation.com](mailto:tddl@aaplautomation.com) with your additional requirements and we will revert to you in 24 hours.

## **Will new features added be available to us?**

We offer one year availability of all support and new features free of cost. After one year, nominal subscription cost will be applicable to you to continue to get free support and updates.

## **What will happen after one year?**

There is no fixed annual charge to be payable mandatory. However if any changes are required in our Add-On to make compatible with New Release of Tally.ERP9 then the modification Charges will be applied.

## **I am using a multi site. Can I use the same Add-on for all the sites?**

No, one Add-on will work only for 1 site. You need to purchase again if you want to use the same Add-on for more sites.

## **I have upgraded to a new Tally.ERP 9 Release. What will happen?**

Normally, the add-on will work fine without any glitches. If you face problems with the Add-on, you can contact us for support.

**Product and Features Page shows errors with the Add-on, What do I do?**

Check first if the error is because of the Add-on or because of clashes between 2 TDLs (An add-on is also a TDL). In case of clashes, disable one or more TDLs and check which TDL has error. If the Add-on has a problem, you can report it to us.

**My Tally went into educational mode after installing the add-on. What do I do?**

Go into **Gateway of Tally** → **Press F12** → **Select Product and Features** -> **Press F4** and remove the Add-on from the list and Restart Tally.