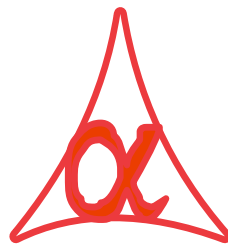




POWER OF SIMPLICITY

Send Whatsapp PDF Document & Message from Tally – 1.0



Alpha Automation Pvt. Ltd.

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GANDHIDHAM (Gujarat)

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Tally, Tally 9, Tally9, Tally Prime, Tally.ERP, Tally.ERP 9, Shoper, Shoper 9, Shoper POS, Shoper HO, Shoper 9 POS, Shoper 9 HO, TallyDeveloper, Tally.Server 9, Tally Developer, Tally. Developer 9, Tally.NET, Tally Development Environment, TallyPrime, TallyPrimeDeveloper, TallyPrime Server, Tally Extender, Tally Integrator, Tally Integrated Network, Tally Service Partner, TallyAcademy & Power of Simplicity are either registered trademarks or trademarks of Tally Solutions Pvt. Ltd. in India and/or other countries. All other trademarks are properties of their respective owners.

Version: Alpha Automation Pvt. Ltd. / Send Whatsapp PDF Document & Message from Tally/1.0/ Oct-2022

Send Whatsapp PDF Document & Message from Tally– 1.0

Introduction

This Module facilitates the user to send Whatsapp PDF Document and Message Directly from Tally Software to the Party. It sends Documents for Voucher Types (Sales, Delivery Note, Sales Order, Purchase, Goods Receipt Note, Purchase Order, Material In, Material Out, Credit Note, Debit Note, Payment and Receipt) and also sends Ledger Statements, Outstanding Reports and other Tally Reports.

Benefits

- User can choose to send only Message, Only PDF Document or both for each Voucher Type. Message Content can be configured for each Voucher Type using configuration Option in Voucher Type. It also allows the user to choose to prompt for Sending Whatsapp during Voucher Entry. If Selected No then it will not ask to send Message during Voucher Entry. User can send Message from the Right Side Button after Re-opening the Voucher.
- 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 Party. It also allows to create 2 Additional Fields in Ledger Master to store Whatsapp Number of Additional Persons for that Ledger. In this case Whatsapp message goes of all 3 Numbers stored in Ledger Master.
- User can store Multiple Internal Whatsapp Numbers of the company in Reporting Option to send Regular Reports (Profit & Loss Reports, Balance Sheet, Day Book, Trail Balance etc.) to internal team or Management. User can send Whatsapp Message to All these number using WA_Owner Button in that Report.
- Outstanding Message and Statement can be sent to Multiple Ledgers in Single Click. Even after selection of Multiple Ledgers for sending outstanding message, user can continue to work in Tally. He does not have to wait for completion of message delivery to do any other work in Tally.
- There is separate program running in background which actually delivers all messages and Documents to the Party and does not keep Tally Software Busy in sending messages. This program also generates Log Report for all messages sent by the user with all required details (Mobile Number, Message Content, File Name &

Path, Delivery Status, Creation and Sent Time). It also gives Search Facility to find any particular message from Total Report.

- If Internet connectivity is not available then the messages are stored in the database and get delivered when Internet connectivity is available. User can see the Status of each Message in Report.

What's New?

- Compatible with Tally Prime

Important!

Take back up of your company data before activating the Add-on.

Once you try/purchase an Add-on, follow the steps below to configure the Add-on and use it.

Installation

1. Copy the TCP file in TallyPrime Folder.
2. Copy the Whatsapp folder in Tally's Export location.
3. Gateway of Tally → F1 (Help) → TDL & Add-on → F4 (Manage Local TDL) → Select Yes in Load TDL on Startup and give the file name of TCP File. After pressing the Enter Key will show TDL Status which should be as Loaded.

System requirements: No additional hardware / software infrastructure is required for executing and operation this applications module

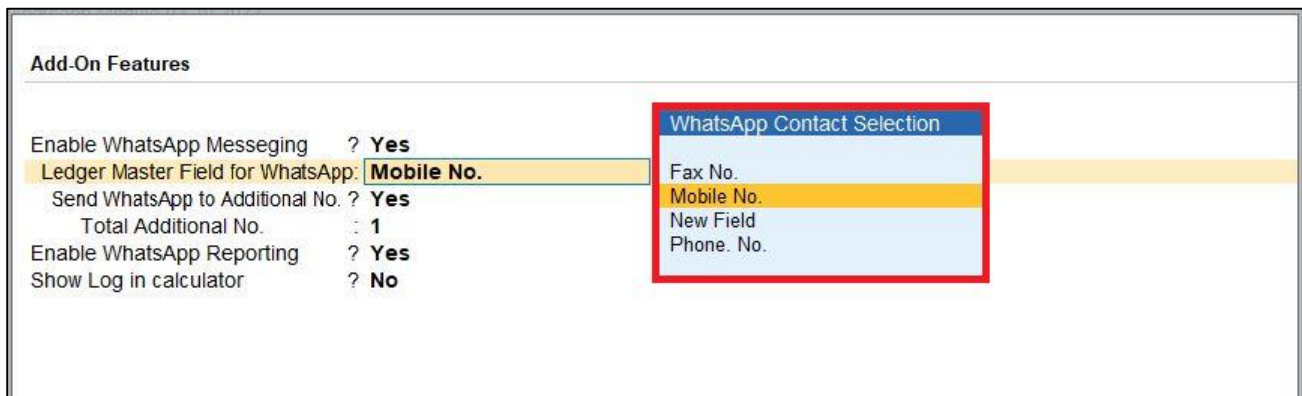
1. Activate the Add-on.

For TallyPrime Release 1.0

Go to **Gateway of Tally → F1: Help → TDL & Add-On → F6: Add-On Features**. Alternatively, you may press **CTRL + ALT + T** from any menu to open TDL Management report and then press **F6: Add-On Features**

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

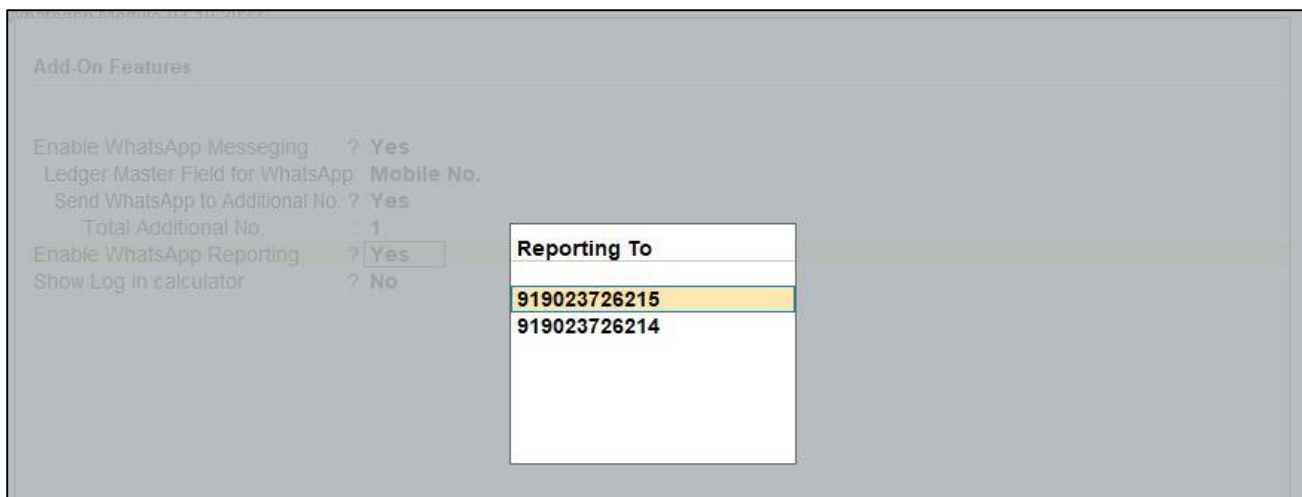
User can select Existing Field of Ledger Master (Phone No. /Mobile No. /Fax No. Or select to New Field to store the WhatsApp Number of the Ledger in Ledger Master.)



Add-On Features	
Enable WhatsApp Messeging	? Yes
Ledger Master Field for WhatsApp:	Mobile No.
Send WhatsApp to Additional No.	? Yes
Total Additional No.	: 1
Enable WhatsApp Reporting	? Yes
Show Log in calculator	? No

WhatsApp Contact Selection
 Fax No.
 Mobile No.
 New Field
 Phone. No.

By enable WhatsApp Reporting user can add owner number in list and directly send tally's report like Daybook, Sales Register, Balance Sheet, Stock Summary etc.



Add-On Features	
Enable WhatsApp Messeging	? Yes
Ledger Master Field for WhatsApp:	Mobile No.
Send WhatsApp to Additional No.	? Yes
Total Additional No.	: 1
Enable WhatsApp Reporting	? Yes
Show Log in calculator	? No

Reporting To
 919023726215
 919023726214

Detailed User Guide:

1. Ledger Master Setup

a) Go to Gateway of Tally → Alter → Accounting Masters → 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.

Ledger Alteration (In Developer Mode)		E System Solution		Total Opening Balance	
English	:				
Name	:	A K Technology			40,000.00 Dr
				Difference	40,000.00 Dr
Under	:	Jamnagar Debtors (Sundry Debtors)			
Maintain balances bill-by-bill	:	Yes			
Default credit period	:				
Check for credit days during voucher entry	:	No			
Inventory values are affected	:	No			
		Mailing Details Name : A K Technology Address : State : Gujarat Country : India Pincode : Additional WhatsApp Contact I : 9023726217 Mobile no. : 9023726216 Provide Contact Details : Yes Set/alter multiple mailing details : No Banking Details Provide bank details : No Tax Registration Details PAN/IT No. : Registration type : Regular GSTIN/UIN : Set/Alter GST details : No			
Opening Balance (on 1-Apr-19) :					

If the Party belongs to another country then select a country and Enter Country code.

Default credit period	:		Region	:	England
Check for credit days during voucher entry	:	No	Country	:	UK
Inventory values are affected	:	No	Pincode	:	
			Country Code	:	44
			Additional WhatsApp Contact I	:	9023726217
			Mobile no.	:	9023726216

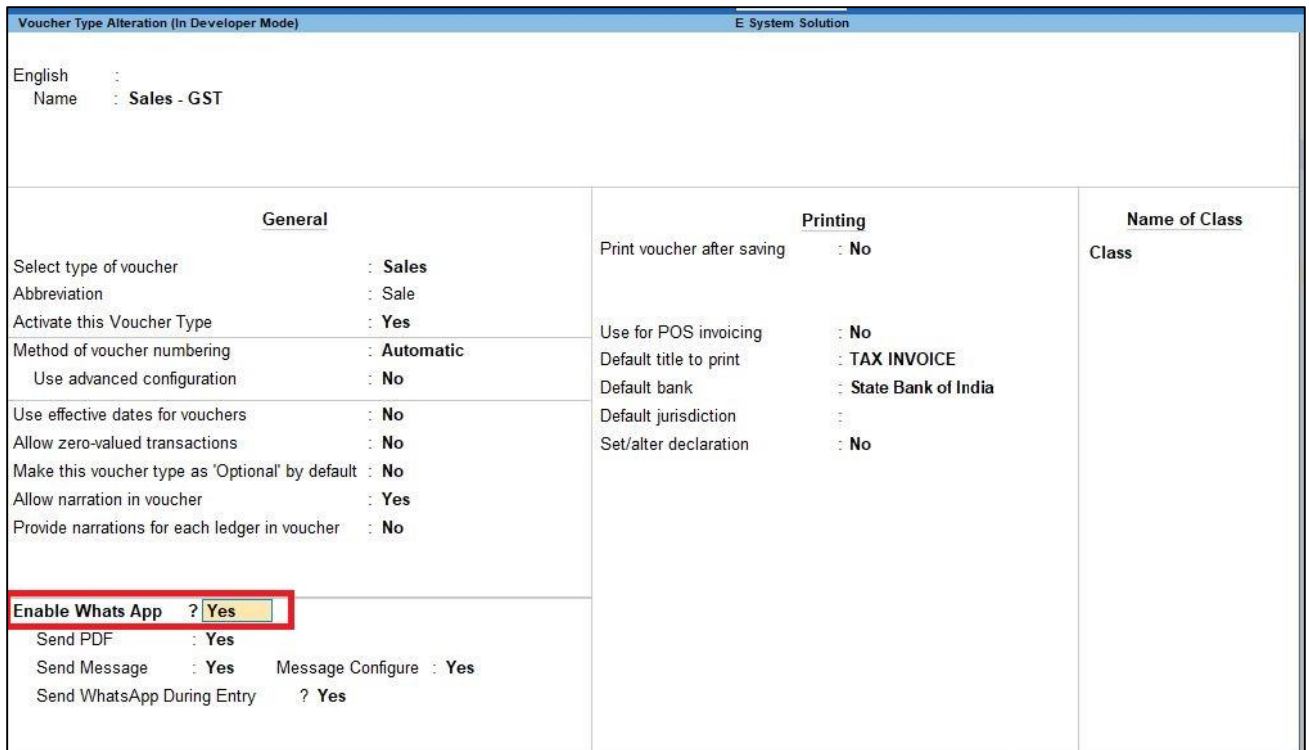
2. Voucher Type Wise Message Setup

Go to **Gateway of Tally** → **Alter** → **Voucher Type** → **Sales - GST**

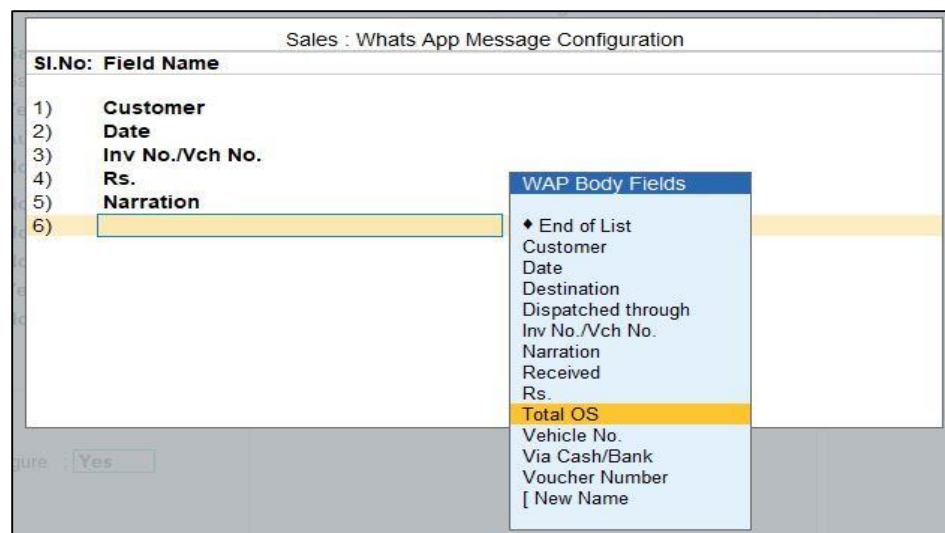
➤ Enable WhatsApp? Set “Yes”

Send PDF & Send Message both option are available you can send both or individual.

In Message Configure You can generate your message by selecting the options.



General		Printing	Name of Class
Select type of voucher	: Sales	Print voucher after saving	: No
Abbreviation	: Sale	Use for POS invoicing	: No
Activate this Voucher Type	: Yes	Default title to print	: TAX INVOICE
Method of voucher numbering	: Automatic	Default bank	: State Bank of India
Use advanced configuration	: No	Default jurisdiction	: No
Use effective dates for vouchers	: No	Set/alter declaration	: No
Allow zero-valued transactions	: No		
Make this voucher type as 'Optional' by default	: No		
Allow narration in voucher	: Yes		
Provide narrations for each ledger in voucher	: No		
Enable Whats App ? Yes Send PDF : Yes Send Message : Yes Message Configure : Yes Send WhatsApp During Entry ? Yes			

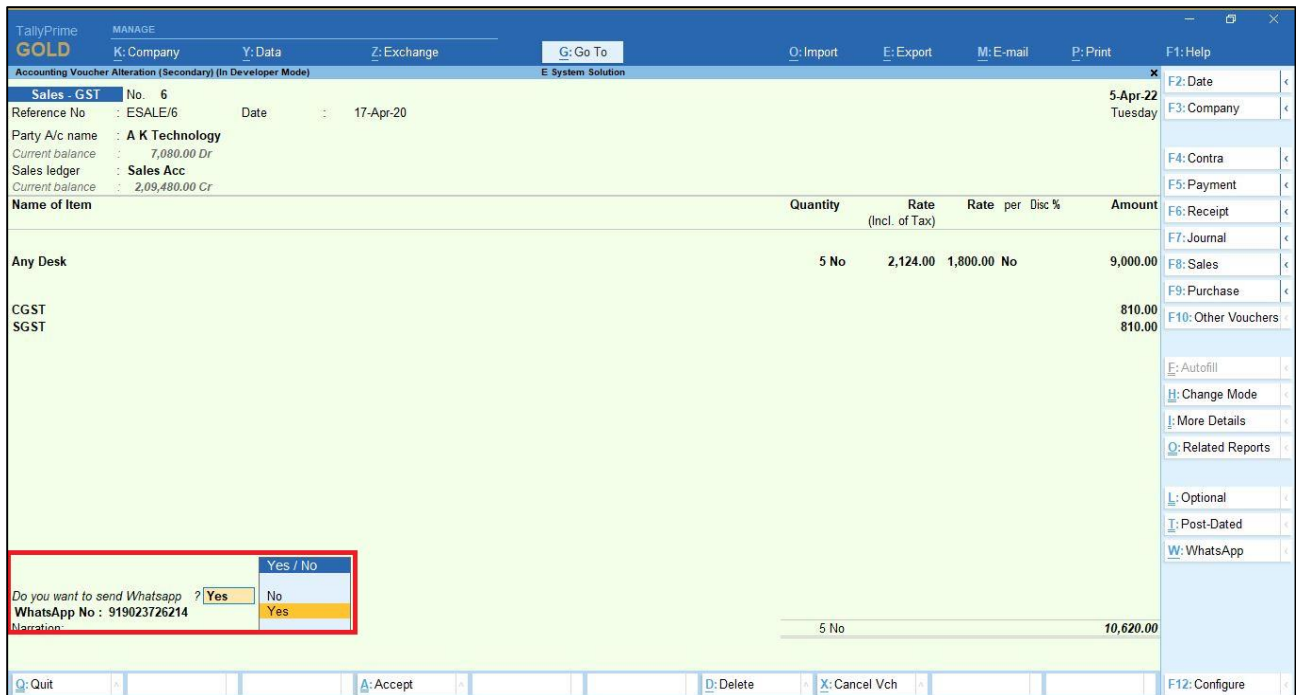


Sl.No:	Field Name
1)	Customer
2)	Date
3)	Inv No./Vch No.
4)	Rs.
5)	Narration
6)	

WAP Body Fields
 ♦ End of List
 Customer
 Date
 Destination
 Dispatched through
 Inv No./Vch No.
 Narration
 Received
 Rs.
Total OS
 Vehicle No.
 Via Cash/Bank
 Voucher Number
 [New Name

3. Voucher Entry

- Go to Vouchers and pass an entry. User will have an option to send WhatsApp.
- Select “Yes” to “Do you want to send WhatsApp?”



TallyPrime GOLD MANAGE
K: Company Y: Data Z: Exchange G: Go To O: Import E: Export M: E-mail P: Print F1: Help

Accounting Voucher Alteration (Secondary) (In Developer Mode) E System Solution

Sales - GST No. 6
Reference No. : E SALE/6 Date : 17-Apr-20
Party A/c name : A K Technology
Current balance : 7,080.00 Dr
Sales ledger : Sales Acc
Current balance : 2,09,480.00 Cr

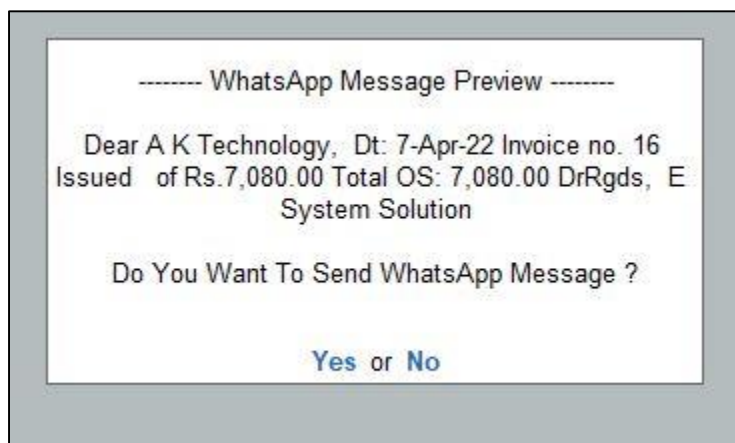
Name of Item	Quantity	Rate (Incl. of Tax)	Rate per	Disc %	Amount
Any Desk	5 No	2,124.00	1,800.00	No	9,000.00
CGST					810.00
SGST					810.00
	5 No				10,620.00

Do you want to send Whatsapp ? ☒ Yes ☐ No
WhatsApp No : 919023726214
Narration:

Buttons: Quit, Accept, Delete, Cancel Vch, Configure

Right Panel (F2-F10):
F2: Date
F3: Company
F4: Contra
F5: Payment
F6: Receipt
F7: Journal
F8: Sales
F9: Purchase
F10: Other Vouchers
Autofill
Change Mode
More Details
Related Reports
Optional
Post-Dated
WhatsApp
Configure

- Before sending Whatsapp Message and PDF a pop-up message showing the message and asking to “Do you want to send Whatsapp Message?” and “Do you want to send PFD”



----- WhatsApp Message Preview -----

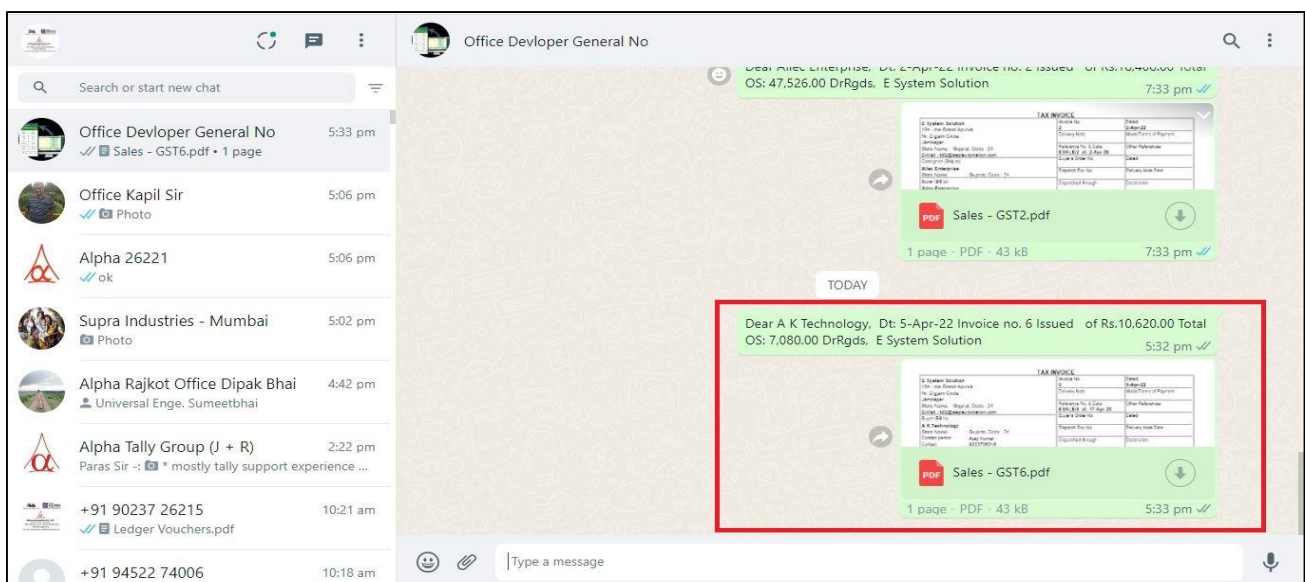
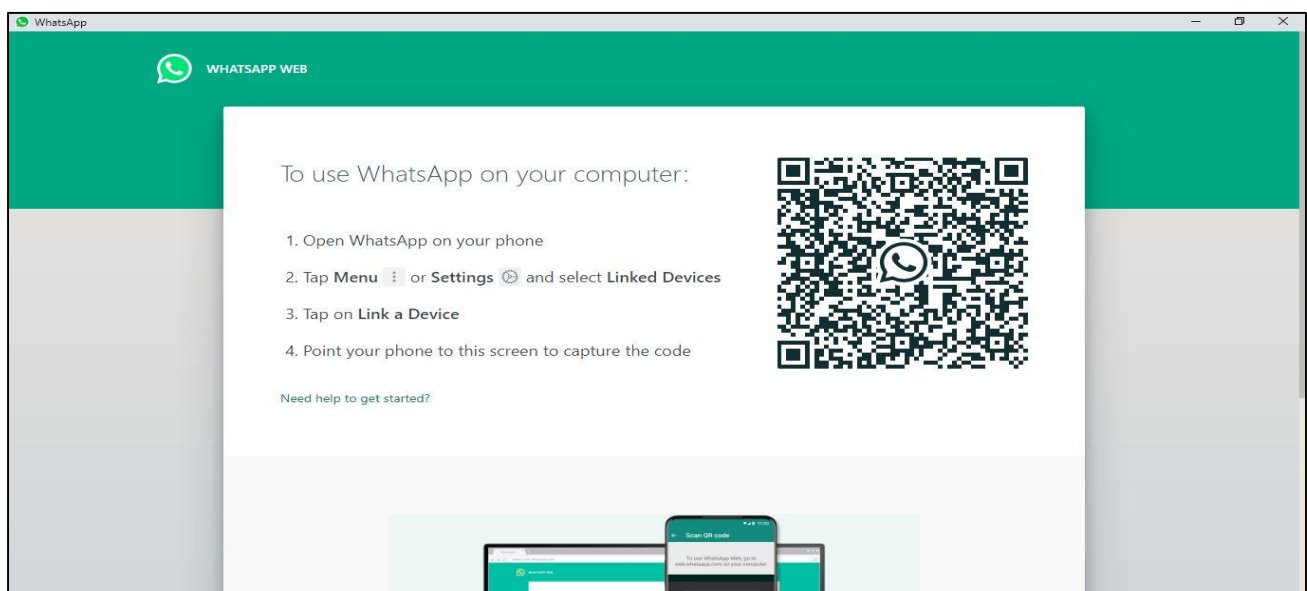
Dear A K Technology, Dt: 7-Apr-22 Invoice no. 16
Issued of Rs.7,080.00 Total OS: 7,080.00 DrRgds, E
System Solution

Do You Want To Send WhatsApp Message ?

Yes or No



d) After All this a web whats App will start automatic. Scan the QR code from your phone and after scan Message and PDF sent automatically.



4. Share Report To Owner

Ex. Sales Register, Stock Summary, Balance Sheet.

TallyPrime
GOLD

MANAGE
K: Company
Y: Data
Z: Exchange
G: Go To

O: Import
E: Export
M: E-mail
P: Print
F1: Help

Voucher Register (In Developer Mode)
E System Solution

1-Apr-22 to 30-Apr-22

List of All Sales Vouchers

Date	Particulars	Vch Type	Vch No.	Debit Amount	Credit Amount
1-Apr-22	Ganesha Enterprise	Sales - GST	1	30,680.00	
2-Apr-22	Allec Enterprise	Sales - GST	2	18,408.00	
3-Apr-22	Amrut International	Sales - GST	3	21,830.00	
4-Apr-22	Allec Enterprise	Sales - GST	4	2,596.00	
5-Apr-22	Aanand Liners	Sales - GST	5	11,500.00	
5-Apr-22	A K Technology	Sales - GST	6	10,620.00	
5-Apr-22	Allec Enterprise	Sales - GST	7	12,980.00	
6-Apr-22	Amrut International	Sales - GST	8	8,968.00	
6-Apr-22	A.R. Enterprise	Sales - GST	9	26,550.00	
6-Apr-22	Ashwini Enterprise	Sales - GST	10	330.40	
6-Apr-22	Drashti Enterprise	Sales - GST	11	42,480.00	
7-Apr-22	J.K. Products	Sales - GST	12	12,390.00	
7-Apr-22	Om Infosys	Sales - GST	13	2,360.00	
7-Apr-22	Sumit Enterprise	Sales - GST	14	34,220.00	
7-Apr-22	Aarti Enterprise	Sales - GST	15	2,124.00	
7-Apr-22	A K Technology	Sales - GST	16	7,080.00	
Total:				2,45,116.40	

F2: Date
F3: Company
F4: Voucher Type
F5
F6
F7: Show Profit
F8: Columnar
F9
F10
B: Basis of Values
H: Change View
J: Exception Reports
L: Save View
E: WA_Owner

TallyPrime
GOLD

MANAGE
K: Company
Y: Data
Z: Exchange
G: Go To

O: Import
E: Export
M: E-mail
P: Print
F1: Help

Stock Summary (In Developer Mode)

E System Solution

Particulars

E System Solution
1-Apr-22 to 7-Apr-22
Closing Balance

QuantityRateValue

Hardware86,414.79

Assemble P73 No1,125.003,375.00

Assemble P81 No3,500.003,500.00

Assemble PIV15 No2,400.0036,000.00

CD Drive7 No24.29170.00

CPU3 No8,500.0025,500.00

Hard Disk8 No2,421.2219,369.79

Keyboard(-)10 No200.00(-)2,000.00

LCD - Monitor(-)5 No

Mouse5 No100.00500.00

Software2,34,462.67

Ammy Admin(-)3 No

Any Desk2 No1,581.343,162.67

Microsoft Office(-)3 No

Quick Heal Anti Virus10 No11,450.001,14,500.00

Team Viewer8 No14,600.001,16,800.00

Grand Total3,20,877.46

Q: Quit

Space: Select

R: Remove Line

U: Restore Line

F12: Configure

F: WA_Owner

F2: Period

F3: Company

F4: Stock Group

F5: Stock Item-wise

F6: Monthly

F7: Show Profit

F8: Valuation

F9: Orders

F10

B: Basis of Values

H: Change View

Exception Reports

Save View

C: New Column

A: Alter Column

D: Delete Column

N: Auto Column

TallyPrime

MANAGE

GOLD

K: Company

Y: Data

Z: Exchange

G: Go To

O: Import

E: Export

M: E-mail

P: Print

F1: Help

Voucher Register (In Developer Mode)

E System Solution

List of All Sales Vouchers

1-Apr-22 to 30-Apr-22

F2: Date

F3: Company

F4: Voucher Type

F5

F6

F7: Show Profit

F8: Columnar

F9

F10

B: Basis of Values

H: Change View

Exception Reports

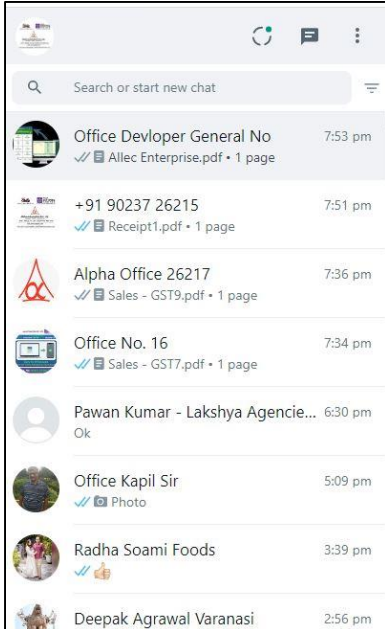
Save View

E: WA_Owner

Date	Particulars	Vch Type	Vch No.	Debit Amount	Credit Amount
1-Apr-22	Ganesha Enterprise	Sales - GST	1	30,680.00	
2-Apr-22	Allec Enterprise	Sales - GST	2	18,408.00	
3-Apr-22	Amrut International	Sales - GST	3	21,830.00	
4-Apr-22	Allec Enterprise	Sales - GST	4	2,596.00	
5-Apr-22	Aanand Liners	Sales - GST	5	11,500.00	
5-Apr-22	A K Technology	Sales - GST	6	10,620.00	
5-Apr-22	Allec Enterprise	Sales - GST	7	12,980.00	
6-Apr-22	Amrut International	Sales - GST	8	8,968.00	
6-Apr-22	A.R. Enterprise	Sales - GST	9	26,550.00	
6-Apr-22	Ashwini Enterprise	Sales - GST	10	330.40	
6-Apr-22	Drashti Enterprise	Sales - GST	11	42,480.00	
7-Apr-22	J.K. Products	Sales - GST	12	12,390.00	
7-Apr-22	Om Infosys	Sales - GST	13	2,360.00	
7-Apr-22	Sumit Enterprise	Sales - GST	14	34,220.00	
7-Apr-22	Aarti Enterprise	Sales - GST	15	2,124.00	
7-Apr-22	A K Technology	Sales - GST	16	7,080.00	
Total:				2,45,116.40	

5. Share Ledger Statement.

TallyPrime GOLD					
MANAGE					
K: Company Y: Data Z: Exchange G: Go To Q: Import E: Export M: E-mail P: Print F1: Help					
Ledger Vouchers (In Developer Mode) E System Solution					
Ledger: Allec Enterprise 1-Apr-22 to 7-Apr-22					
Date	Particulars	Vch Type	Vch No.	Debit	Credit
2-Apr-22	Sales Acc	Sales - GST	2	18,408.00	
3-Apr-22	State Bank of India	Receipt	1		18,408.00
4-Apr-22	Sales Acc	Sales - GST	4	2,596.00	
5-Apr-22	Sales Acc	Sales - GST	7	12,980.00	
5-Apr-22	State Bank of India	Receipt	2		2,596.00
Opening Balance :				13,542.00	
Current Total :				33,984.00	21,004.00
Closing Balance :				26,522.00	



Search or start new chat

- Office Developer General No 7:53 pm
- +91 90237 26215 7:51 pm
- Alpha Office 26217 7:36 pm
- Office No. 16 7:34 pm
- Pawan Kumar - Lakshya Agencie... 6:30 pm
- Office Kapil Sir 5:09 pm
- Radha Soami Foods 3:39 pm
- Deepak Agrawal Varanasi 2:56 pm

Office Developer General No

Dear Allec Enterprise, Dt: 2-Apr-22 Invoice no. 2 Issued of Rs.18,408.00 Total OS: 47,526.00 DrRgds, E System Solution

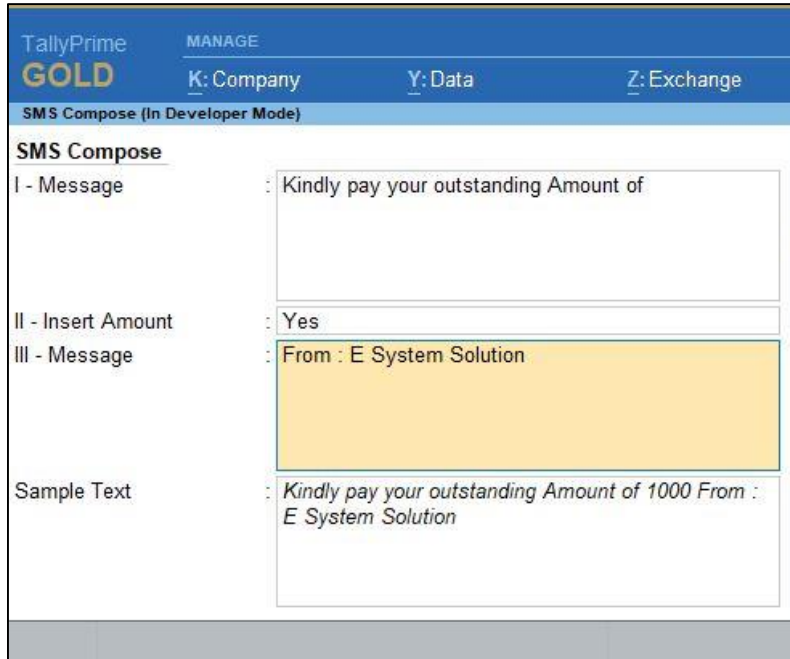
Sales - GST1.pdf
1 page - PDF - 43 kB 7:29 pm

Sales - GST2.pdf
1 page - PDF - 43 kB 7:33 pm

Allec Enterprise.pdf
1 page - PDF - 2 kB 7:53 pm

6. Outstanding Message from Whatsapp Outstanding Report.

You can write your own Message here.



Search Party with F3 Button or press first letter of party name for quit search.

TallyPrime
GOLD

MANAGE

K: Company

Y: Data

Z: Exchange

G: Go To

O: Import

E: Export

M: E-mail

P: Print

F1: Help

Selected Ledger WAP (In Developer Mode)

E System Solution

WhatsApp Outstanding Report

1-Apr-22 to 30-Apr-22

Sr. No.	Ledger Name	Contact Person	Mobile	Closing Balance	Message
1	A K Technology	Ajay Kumar	919023726216	7,080.00 Dr	Kindly pay your outstanding Amount of 7,080.00 From : E System Solution
2	Allec Enterprise	Ashish Mehta	919023726214	26,522.00 Dr	Kindly pay your outstanding Amount of 26,522.00 From : E System Solution
3	Alpha Automation	Kapil Nagori	919825098442	25,960.00 Dr	Kindly pay your outstanding Amount of 25,960.00 From : E System Solution
4	Ashwini Enterprise	Ashwini Majumdar	919023726216	0.40 Dr	Kindly pay your outstanding Amount of 0.40 From : E System Solution
5	Devendra Enterprise	Devendra Kumar	919023726218	44,728.00 Dr	Kindly pay your outstanding Amount of 44,728.00 From : E System Solution
6	Ganesha Enterprise	Kartik Dave	919023726219	6,830.00 Dr	Kindly pay your outstanding Amount of 6,830.00 From : E System Solution
7	Manish Mehta & Co.	Manish Mehta		46,020.00 Dr	Kindly pay your outstanding Amount of 46,020.00 From : E System Solution
8	Om Infosys	Mahesh Bhatt	919848514512	2,360.00 Dr	Kindly pay your outstanding Amount of 2,360.00 From : E System Solution
9	Smile Solutions	Simran Kor	918844251451	10,960.00 Dr	Kindly pay your outstanding Amount of 10,960.00 From : E System Solution
10	Sumit Enterprise	Sumit Trivedi	919966154512	34,220.00 Dr	Kindly pay your outstanding Amount of 34,220.00 From : E System Solution
11	Tricolite Solutions			47,200.00 Dr	Kindly pay your outstanding Amount of 47,200.00 From : E System Solution
Total				2,51,880.40	

T: SMSText

F2: Period

F3: Search Party

D: Selected WAP

Q: Quit

Space: Select

U: Restore All

7. Whats App Status Report.

WhatsApp							
Search				08-Oct-2022		08-Oct-2022	
NO	MOBILE	MESSAGE	FILE PATH	STATUS	REMARKS	CREATE TIME	SEND TIME
1	919023726216	Dear A K Technology, Dt: 7-Apr-22 Invoice no. 16 Issued of Rs.7,080.00 T...	D:\TallyPrime\Export\TallyWhatsA...	Message Send Successful		08-Oct-2022 19:26:42	08-Oct-2022 19:28:33
2	919023726217	Dear A K Technology, Dt: 7-Apr-22 Invoice no. 16 Issued of Rs.7,080.00 T...	D:\TallyPrime\Export\TallyWhatsA...	Message Send Successful		08-Oct-2022 19:26:42	08-Oct-2022 19:28:58
3	919023726214	Dear Ganesha Enterprise, Dt: 1-Apr-22 Invoice no. 1 Issued of Rs.30,680...	D:\TallyPrime\Export\TallyWhatsA...	Message Send Successful		08-Oct-2022 19:27:42	08-Oct-2022 19:29:21
4	919023726214	Dear Allec Enterprise, Dt: 2-Apr-22 Invoice no. 2 Issued of Rs.18,408.00 ...	D:\TallyPrime\Export\TallyWhatsA...	Process		08-Oct-2022 19:28:08	08-Oct-2022 19:28:08
5	919023726215	Dear Aanand Liners, Dt: 5-Apr-22 Invoice no. 5 Issued of Rs.11,500.00 To...	D:\TallyPrime\Export\TallyWhatsA...	Process		08-Oct-2022 19:29:48	08-Oct-2022 19:29:48
6	919023726216	Dear A K Technology, Dt: 5-Apr-22 Invoice no. 6 Issued of Rs.10,620.00 T...	D:\TallyPrime\Export\TallyWhatsA...	Process		08-Oct-2022 19:30:09	08-Oct-2022 19:30:09
7	919023726216	Dear Allec Enterprise, Dt: 5-Apr-22 Invoice no. 7 Issued of Rs.12,980.00 ...	D:\TallyPrime\Export\TallyWhatsA...	Process		08-Oct-2022 19:30:23	08-Oct-2022 19:30:23
8	919023726217	Dear Amrut International, Dt: 6-Apr-22 Invoice no. 8 Issued of Rs.8,968.0...	D:\TallyPrime\Export\TallyWhatsA...	Process		08-Oct-2022 19:30:35	08-Oct-2022 19:30:35
9	919023726217	Dear A.R. Enterprise, Dt: 6-Apr-22 Invoice no. 9 Issued of Rs.26,550.00 T...	D:\TallyPrime\Export\TallyWhatsA...	Process		08-Oct-2022 19:30:52	08-Oct-2022 19:30:52

FAQ

Which version/release of TallyPrime does the add-on support?

This add-on will work only from Tally Prime Release 1.0 onwards.

How will I get support for this add-on?

For any functional support requirements please do write to us on mail@aaplautomation.com or call us at +91-288-2713956/57/58, +91-9023726215/16/17, 9099908115, 9825036442.

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

Please to write to us on mail@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 TallyPrime 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.

TDL Management screen shows errors with the Add-on. What do I do?

Check whether 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 the 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 F1 (Help)** → **TDL & Add-on** → **Press F4** and remove the Add-on from the list and Restart Tally.