

InstaSMP

Code -ITA001

Did you know?

Tally can be Tailored to suit individual needs.

- Every business has peculiar way of handling the business activities.
- Although Tally satisfies 95% of any Business needs still there is a scope for 5% gap filling.
- How to fulfil this GAP?

Answer : TDL

- TDL – Tally Definition Language
- Utility provided by Tally itself helps in handling Simple/ complex Business scenarios.
- Simple?

Yes.

Yet Powerful!!!

SMS

- Almost everyone uses SMS for communication.
- Why your business be deprived of this facility?

INSTA- SMS

INSTA- SMS

- INSTACOMP brings INSTA-SMS an addon for Tally
- Every Invoice, Receipt, Payment is followed with SMS to the party.
- A gentle reminder of Outstanding is also available

InstaSMS – How it works?

- Whenever a Sale Invoice is raised, an SMS is automatically sent to the party.
- SMS facility is also available on Receipts, Payments, Debit Note, Credit Note and outstanding amount.

Features of InstaSMS Module

- It instantly informs Customer as soon as you record important transactions in Tally.
- It politely reminds customer about Overdue Bills.
- It sends bulk reminders for all overdue bills together with customer selection option.

Features of InstaSMS Module

- SMS Packages are available at reasonable rate.
- You can purchase additional SMS Packages to continue using SMS Module.
- DND customers also receive messages.

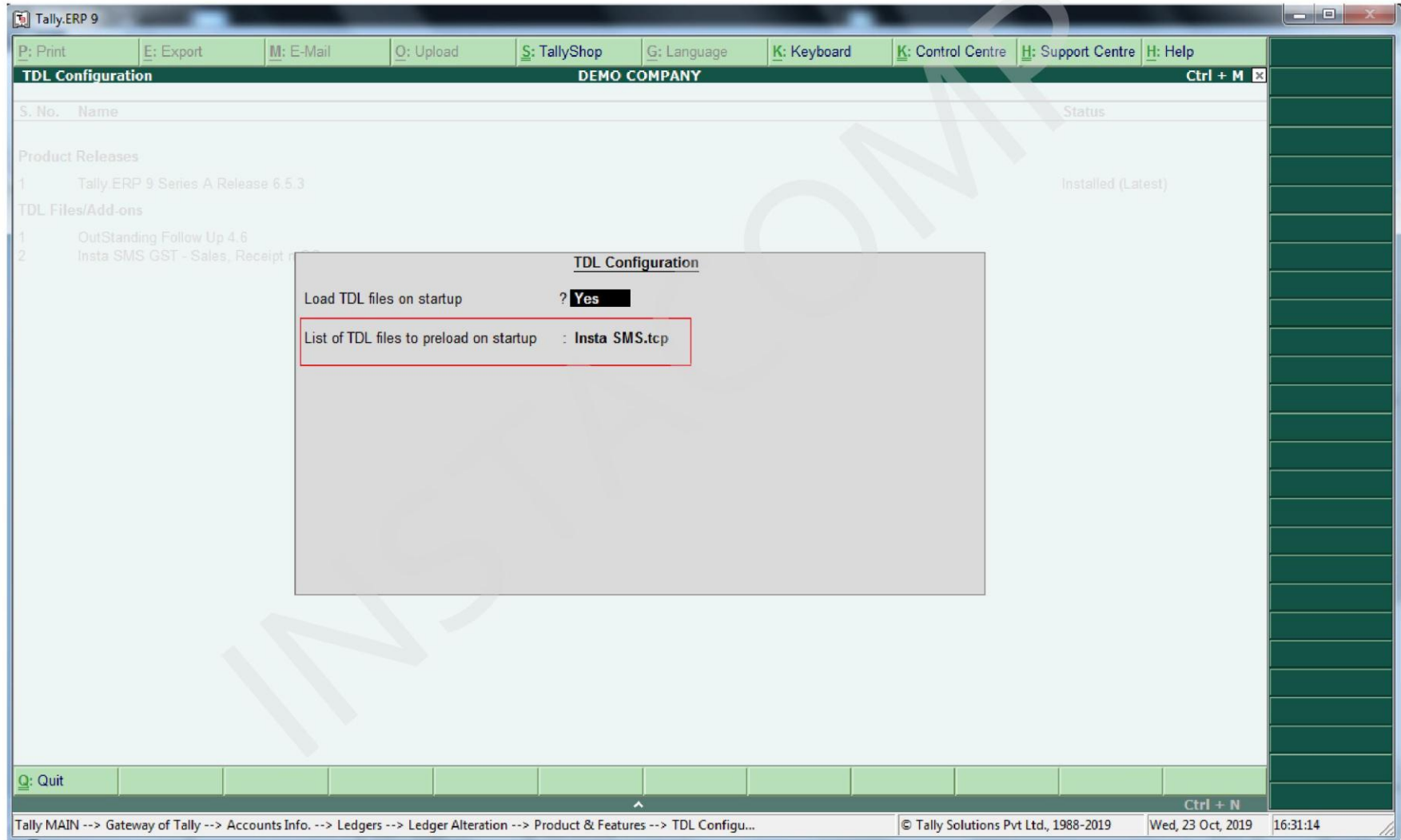
Steps to Install

Important!

❖ **As a best practice it is advisable to take back up your company data before installing the Add-on.**

Attach TCP file to Tally.ERP9.

Gateway of Tally > Configuration (F12) > Product & Features(T) > Manage Local TDL (F4)
(Following screen will appear)



Enter all the details required to send SMS in Add on Features.

Gateway of Tally > Features(F11) > Add ons(F6)

(Following screen will appear)

The screenshot shows the 'Company Operations Alteration' window in Tally.ERP 9. The window title is 'Company Operations Alteration' and the company name is 'DEMO COMPANY'. The current period is '1-4-2018 to 31-3-2018'. The 'Add-On Features' section is highlighted with a red box. The settings are as follows:

Feature	Value
Enable Outstanding FollowUp	No
Hide Pop-Up on Startup	No
Co. Short Name	
Co. Sender ID	
SMS User Name	
SMS Password	*
Enable SMS After Sales	Yes
Enable SMS After Receipt	Yes
Enable Bulk Outstanding	Yes
Only Overdue (Y/N)	Yes
Enable SMS After Debit Note	Yes
Enable SMS After Credit Note	Yes
Enable SMS with Closing Balance	Yes

At the bottom of the window, there is a footer with the following text: 'Click on Shop button to buy Add-Ons'. The status bar at the bottom of the window shows: 'Tally MAIN --> Gateway of Tally --> Company Features --> Company Operations Alteration', '© Tally Solutions Pvt Ltd., 1988-2019', 'Wed, 23 Oct, 2019', and '16:26:12'.

Make sure that Mobile No. field in Party's Ledger is updated with correct number. It is required for sending SMS.

Tally.ERP 9

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

Ledger Alteration **DEMO COMPANY** Ctrl + M

Name : Kumar Rane (alias) :		Total Opening Balance	
		96,33,185.72 Dr	
		96,33,185.72 Cr	

Under : XI-A (Sundry Debtors)	Mailing Details
Maintain balances bill-by-bill ? Yes	Name : Kumar Rane
Default credit period : 1 Days	Address : Kolhapur
Check for credit days during voucher entry ? No	Country : India
Inventory values are affected ? No	State : Maharashtra Pincode :
Cost centres are applicable ? No	(Select the applicable state to calculate GST during voucher entry.)
	Contact person : Kumar Rane
	Phone no. :
	Mobile no. : 9011069965
	Fax no. :
	E-mail : kumarrane@gmail.com
	CC to (if any) :
	Website :
	Provide bank details ? No
	Tax Registration Details
	PAN/IT No. : AYAPL1594C
	Registration type : Regular
	GSTIN/UIN : 27AYAPL1594C1Z5
	Set/alter GST details ? No
	Set/Alter VAT Details ? No

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., 1988-2019 Thu, 24 Oct, 2019 10:44:54

Ctrl + N

F3: Company
F3: New Company
F10: Edit Sort
L: Details
B: Set Chq Books
S: Set Chq Printing
G: Groups
L: Ledgers
S: Cost Category
C: Cost Centre
V: Voucher Types
F11: Features
F12: Configure

You can update or change the mobile number of the customer on Sales invoice.

Tally.ERP 9

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

Accounting Voucher Creation **DEMO COMPANY** Ctrl + M

Sales No. 3 Voucher class: Not Applicable 12-Mar-2019
 Tuesday

Reference no.:

Party A/c name : Kumar Rane
 Cell No : 9011069965
 Current balance :
 Sales ledger : Sales Account GST

Name of Item	Quantity	Rate (Incl. of Tax)	Rate per	Disc %	Amount
Demo	2 NO	500.00	423.73	NO	847.46
Cgst					76.27
Sgst					76.27
					1,000.00

Narration:

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

Tally MAIN --> Gateway of Tally --> Accounting Voucher Creation © Tally Solutions Pvt Ltd., 1988-2019 Wed, 23 Oct, 2019 16:36:49

F1: Accounting Vouchers
 F1: Inventory Vouchers
 E2: Order Vouchers
 F2: Date
 F3: Company
 F4: Contra
 F5: Payment
 F6: Receipt
 F7: Journal
 F8: Sales
 E8: Credit Note
 F9: Purchase
 E9: Debit Note
 F10: Reversing Journal
 E10: Memos
 S: Stock Query
 A: Tax Analysis
 V: View SMS
 I: Accounting Invoice
 V: As Voucher
 T: Post-Dated
 L: Optional
 F11: Features
 F12: Configure

After saving the voucher you can choose to send SMS to the customer.

The screenshot shows the Tally.ERP 9 Accounting Voucher Creation interface. 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 main header displays 'Accounting Voucher Creation' and 'DEMO COMPANY' with a 'Ctrl + M' icon. Below this, the voucher details are shown: 'Sales' No. 3, Reference no.: , Voucher class: Not Applicable, and the date '12-Mar-2019 Tuesday'. The party information includes 'Party A/c name : Kumar Rane', 'Cell No : 9011069965', 'Current balance :', and 'Sales ledger : Sales Account GST'. A table lists the items:

Name of Item	Quantity	Rate (Incl. of Tax)	Rate per	Disc %	Amount
Demo	2 NO	500.00	423.73	NO	847.46
Cgst					76.27
Sgst					76.27

A dialog box with a red border is centered on the screen, containing the text 'Send SMS ?' and 'Yes or No' at the bottom. The 'Narration:' field at the bottom of the voucher is empty, with a total amount of '1,000.00' shown on the right. The bottom status bar includes: 'Tally MAIN --> Gateway of Tally --> Accounting Voucher Creation', '© Tally Solutions Pvt Ltd., 1988-2019', 'Wed, 23 Oct, 2019', and '16:37:13'. The bottom menu bar contains: Q: Quit, A: Accept, D: Delete, X: Cancel, and a 'Ctrl + N' icon.

Notification is given about the number of characters in SMS.

Tally.ERP 9

P: Print E: Export M: E-Mail O: Upload S: TallyShop G: Language K: Keyboard K: Control Centre H: Support Centre H: Help Ctrl + M

Accounting Voucher Creation **DEMO COMPANY** 12-Mar-2019
 Tuesday

Sales No. 3 Voucher class: Not Applicable

Reference no.:

Party A/c name : Kumar Rane
 Cell No : 9011069965
 Current balance :
 Sales ledger : Sales Account GST

Name of Item	Quantity	Rate (Incl. of Tax)	Rate per	Disc %	Amount
Demo	2 NO	500.00	423.73	NO	847.46
Cgst					76.27
Sgst					76.27

Narration:

Status

124 Character SMS Sent Successfully

(press any key)

Q: Quit A: Accept D: Delete X: Cancel Ctrl + N

Tally MAIN --> Gateway of Tally --> Accounting Voucher Creation © Tally Solutions Pvt Ltd., 1988-2019 Wed, 23 Oct, 2019 16:37:38

The sent message can be viewed with the key **Alt + V** (View SMS) on buttons panel.

Tally.ERP 9

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

Accounting Voucher Alteration DEMO COMPANY **Ctrl + M**

Sales No. 3 **12-Mar-2019**
 Reference no.: Tuesday

Party A/c name : Kumar Rane
 Cell No : 9011069965
 Current balance : 1,000.00 Dr
 Sales ledger : Sales Account GST

Name of Item	Quantity	Rate (incl. of Tax)	Rate per Disc %	Amount
Demo	2 NO	500.00	423.73 NO	847.46
Cgst				76.27
Sgst				76.27

Narration: 2 NO

Message

Dear
 Material despatched. Bill No: 3 Dt/12-3-2019. Bill Amt Rs. 1,000.00. Total Balance Rs. 1,000.00 - INSTACOMP
 - Length: 124

(press any key)

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

Ctrl + N

Tally MAIN --> Gateway of Tally --> Accounting Voucher Alteration © Tally Solutions Pvt Ltd., 1988-2019 Wed, 23 Oct, 2019 16:38:11

F1: Accounting Vouchers
 F1: Inventory Vouchers
 F2: Order Vouchers
 F2: Date
 F3: Company
 F4: Contra
 F5: Payment
 F6: Receipt
 F7: Journal
 F8: Sales
 F8: Credit Note
 F9: Purchase
 F9: Debit Note
 F10: Reversing Journal
 F10: Memos
 S: Stock Query
 A: Tax Analysis
V: View SMS
 I: Accounting Invoice
 V: As Voucher
 T: Post-Dated
 L: Optional
 F11: Features
 F12: Configure

Similarly the SMS can be sent after receiving payment from the party.

The screenshot shows the Tally.ERP 9 Accounting Voucher Creation window. 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 title bar also shows "Ctrl + M".

The main area displays the following information:

- Accounting Voucher Creation** (DEMO COMPANY)
- Receipt** No. 1743, dated 12-Mar-2019 (Tuesday)
- Account: **Cash**, Cur Bal: 40,560.85 Dr
- Particulars** table:

Particulars	Amount
Kumar Rane	1,000.00
Cur Bal: 1,000.00 Cr	
New Ref 1743 1 Days 1,000.00 Cr (13-Mar-2019)	

Narration:

1,000.00

At the bottom, there is a status bar with the text: "Tally MAIN --> Gateway of Tally --> Accounting Voucher Creation". The footer shows: "© Tally Solutions Pvt Ltd., 1988-2019", "Thu, 24 Oct, 2019", and "10:41:35".

For Outstanding payment select the option from Statement of Accounts.

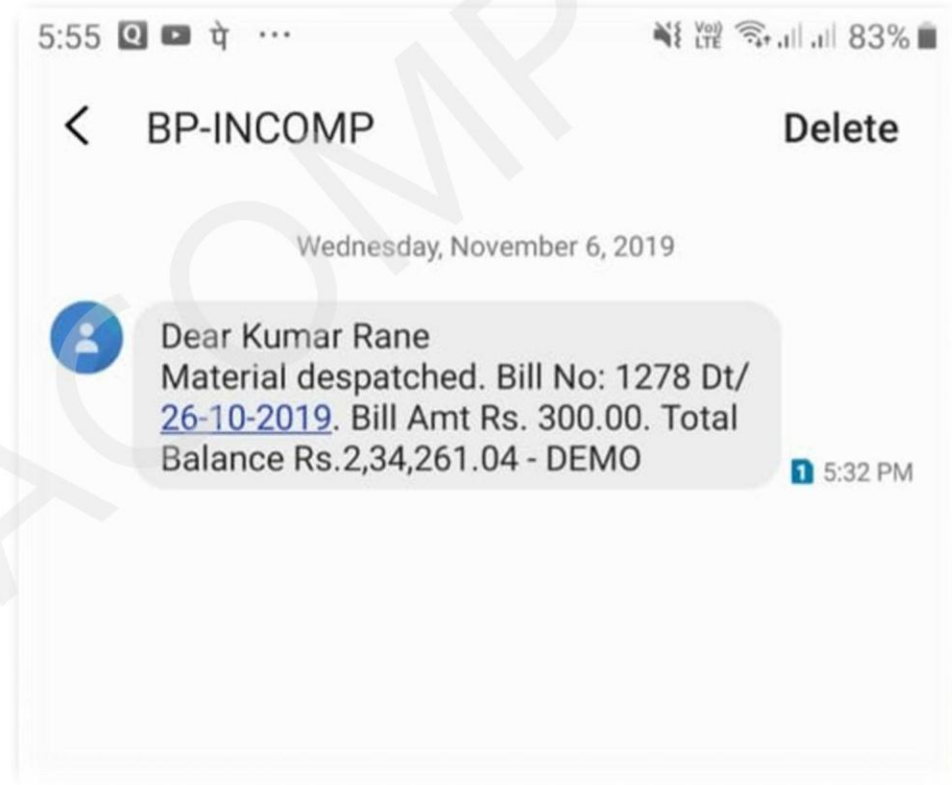
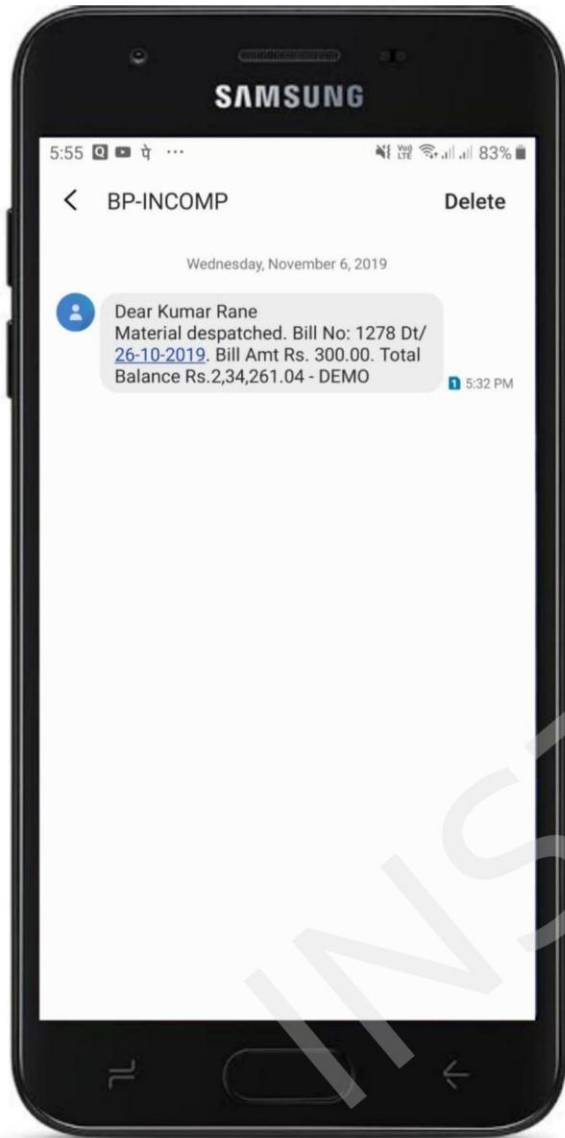
Gateway of Tally > Display(D) > Statement of Accounts(S) > Outstanding – SMS(U)

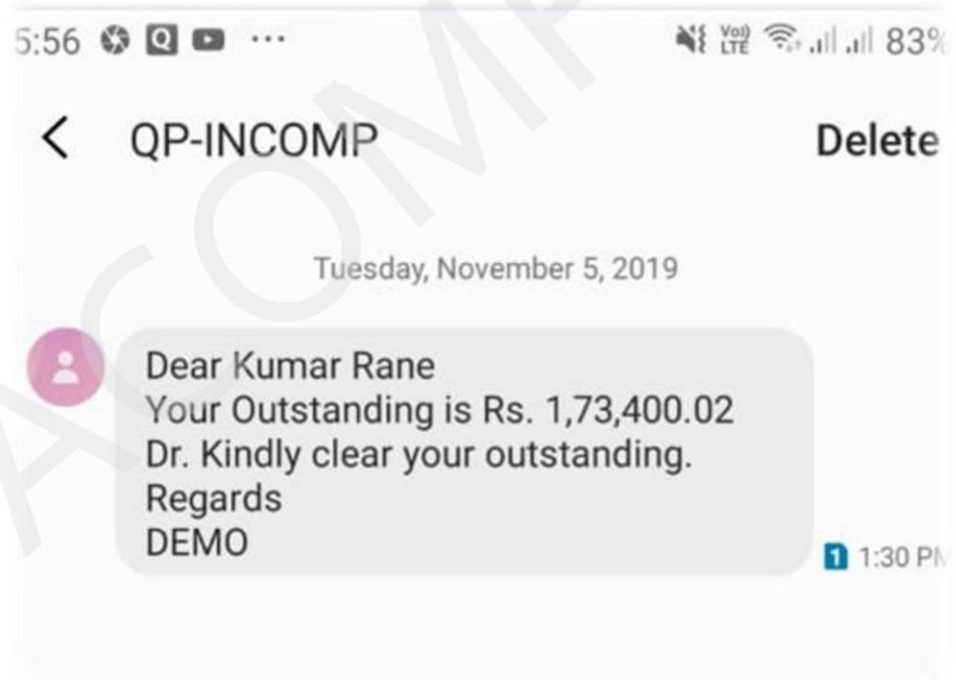
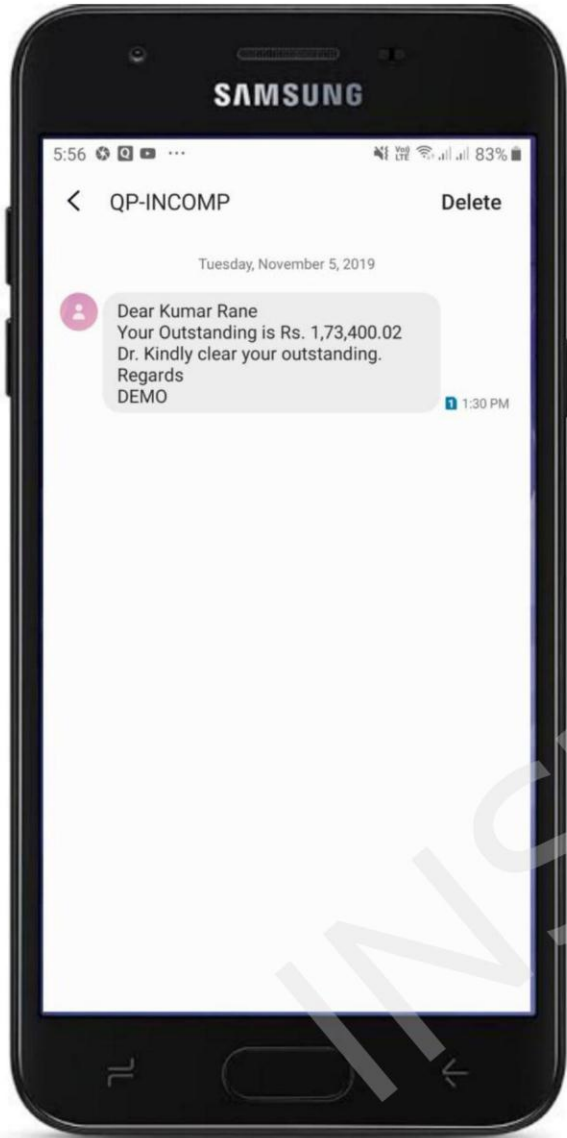
The screenshot shows the Tally.ERP 9 software interface. At the top, there is a menu bar with options: P: Print, E: Export, M: E-Mail, O: Upload, S: TallyShop, G: Language, K: Keyboard, K: Control Centre, H: Support Centre, H: Help. Below this is the 'Gateway of Tally' header with 'Ctrl + M' and a close button. The main area displays 'Current Period: 1-4-2018 to 31-3-2019' and 'Current Date: Tuesday, 12 Mar, 2019'. A section titled 'List of Selected Companies' shows a table with columns 'Name of Company' and 'Date of Last Entry', containing one entry: 'DEMO COMPANY' with '12-Mar-2019'. A 'Statements of Accounts' menu is open, listing options: Outstandings, **Outstandings - SMS** (highlighted with a red box), Cost Centres, Audit and Compliance Info, Statistics, and Quit. The bottom status bar includes: Product (Tally.ERP 9), Version & Updates (Series A Release 6.5.3), License & Services, Configuration (Gateway, ODBC Server), Calculator, and system information (© Tally Solutions Pvt Ltd., 1988-2019, Wed, 23 Oct, 2019, 16:40:46). The breadcrumb trail at the bottom reads: Tally MAIN --> Gateway of Tally --> Display Menu --> Statements of Accounts.

Select a ledger and click on the button Send SMS (**Alt+S**) on buttons panel. Multiple ledgers can be selected to send SMS to multiple parties at one go.

The screenshot shows the 'Selected Ledger SMS' window in Tally.ERP 9. The window title is 'Demo Company' and it includes a 'Ctrl + M' icon. The top menu bar contains several options: P: Print, E: Export, M: E-Mail, O: Upload, S: TallyShop, G: Language, K: Keyboard, K: Control Centre, H: Support Centre, H: Help, and S: Send SMS (highlighted with a red box). The main area displays a table with columns for S.No, Name, Mobile, Overdue Balance, and Total Balance. The table contains 10 rows of ledger data. The bottom status bar shows the navigation path: Tally MAIN --> Gateway of Tally --> Display Menu --> Statements of Accounts --> Selected Ledger SMS. The footer includes copyright information for Tally Solutions Pvt Ltd., the date Tue, 5 Nov, 2019, and the time 12:20:24.

S.No	Name	Mobile	Overdue Balance	Total Balance
1	Hotel Potbhar	9987665412	20,520.00 Dr	20,520.00 Dr
2	Kedar Arts	9987456654	12,300.00 Dr	12,300.00 Dr
3	Kolhapur Seva Kendra	7789564412	600.00 Dr	600.00 Dr
4	Kolhapur Suger	7789458879	30,000.00 Dr	30,000.00 Dr
5	Kumar Rane	9011069965	1,98,400.02 Dr	1,98,400.02 Dr
6	Manish Pande	7789456123	15,000.00 Dr	15,000.00 Dr
7	Omkar Foods	9954687123	40,000.00 Dr	40,000.00 Dr
8	Omkar Raut	7896541235	35,000.00 Dr	35,000.00 Dr
9	Raj Pc Store	9871234560	1,25,300.00 Dr	1,25,300.00 Dr
10	Sagar Auto	9877546689	30,300.00 Dr	30,300.00 Dr





Thank You!

