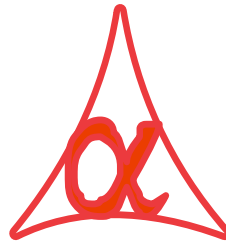




POWER OF SIMPLICITY

Auto E-mailing after voucher entry – 1.1



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Version: Alpha Automation Pvt. Ltd. / Auto Emailing after voucher entry /1.1/ Feb - 2022

Auto Emailing after voucher entry- 1.1

Introduction

This Add-on facilitates user to Send E-mail on Voucher Acceptance automatically. It can be configured Voucher Type Wise whether Email Sending Window is required or not for sending message. For Auto sending Email, user can choose Email Profile in voucher Type. Also User can predefine Email Body Message in Voucher Type. Add-On gives option of storing email password so that every time password is not required for sending email. This Add-On works with All Accounting Vouchers, Order Vouchers, Delivery Note and Receipt Note.

Benefits

- After Each Voucher Entry Add-On reminds user to send Email.
- Auto Mode and Saving Password option allows the user to send email without entering user name and password each time.
- User can predefine Email Body message for each Voucher Type.
- In payment Voucher, user can choose to send Payment Advise in Email.

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. 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 Tally Prime 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 Auto E-Mailing after Voucher Entry?**”

Set “**Yes**” to the option “**Enable Save password for E-mail?**”

Add-On Features

Auto E-Mailing after Voucher Entry ? **Yes**
Save Password for E-mail ? **Yes**

Accept ?
Yes or No

Detailed User Guide:

1. Go to Gateway of Tally → Alter → Accounting Masters → Voucher Type → Alter/Create → Sales voucher type

Set “Yes” to “Auto E-Mailing after Voucher Entry?”

Mail Body Message: yes

Require User Control: no

Select Mail Profile: user can select any mail profile created in software.

General		Printing	Name of Class
Name	: Sales	Print voucher after saving	: No
(alias)	:	Auto E-Mailing after Voucher Entry ?	Yes
Select type of voucher	: Sales	Mail Body Message	: Yes
Abbreviation	: Sale	Require User Control	: No
Activate this Voucher Type	: Yes	Select Mail Profile	: [Dropdown]
Method of voucher numbering	: Automatic	<div style="border: 1px solid blue; padding: 2px;"> EmailProfile mail@aaplautomation.com tdl2@aaplautomation.com </div>	
Use advanced configuration	: No	Use for POS invoicing	: No
Use effective dates for vouchers	: No	Default title to print	:
Allow zero-valued transactions	: No	Default bank	: ♦ Not Applicable
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		
Position Index in Reports	: 70		

- If user set yes to “mail body message” user can write “mail body message” for E-mailing any voucher. And set yes to “Require User Control” option user can select manually email profile after voucher entry for E-Mailing any voucher.

2. Go to E-mail (Alt + M) → Configuration → select any predefined email profile. Enter password for selected email profile as shown below.

Modify E-mail Profile

E-mail sender name	:	Alpha Automation
E-mail from	:	mail@aaplautomation.com
Enter E-mail Password	:	*
Show additional options	:	Yes
Username(for authentication)	:	mail@aaplautomation.com
E-mail Server	:	♦ User Defined
Server address	:	aaplautomation.com
Port Number	:	465
Use SSL	:	Yes
<i>(Select 'Yes' if you are using Secured SMTP server)</i>		
Use SSL/TLS on standard port	:	No
<i>(Select 'Yes' if you are using SSL on default/Standard SMTP port)</i>		

- For E-Mailing any voucher, E-Mail password is auto save in E-Mail profile and E-Mail will be sent without asking username and password.

3. Enter Any Sales Voucher. Set Option “Yes” to “Send E-Mail:” as shown below & Save Voucher.

Accounting Voucher Alteration (Secondary) Alpha Infotech

Sales No. 5 30-Nov-21
 Reference No : Date : Tuesday
 Party A/c name : Amin Digital Services
 Current balance : 1,23,961.05 Dr
 Sales ledger : Sales
 Current balance : 69,29,445.00 Cr

Name of Item	Quantity	Rate per	Amount
21" LED TV LG	1 Nos	15,000.00 Nos	15,000.00
CGST			1,350.00
SGST			1,350.00

Narration: 1 Nos

Send E-Mail : Yes

Accept ?
 Yes or No

- After Accepting/Saving the Voucher, E- Mail Address will automatically pick up from Party Ledger and Sales Invoice will be automatically E-Mail to the Party.

4. Go to Gateway of Tally → Alter → Accounting Masters → Voucher Type → Alter/Create → payment voucher type
Set “Yes” to “Mail Payment Advice?”

Voucher Type Alteration		Alpha Infotech	
Name	: Payment		
(alias)	:		
General		Printing	Name of Class
Select type of voucher	: Payment	Print voucher after saving	: No
Abbreviation	: Pymt	Auto E-Mailing after Voucher Entry ?	Yes
Activate this Voucher Type	: Yes	Mail Body Message	: Yes
Method of voucher numbering	: Automatic	Require User Control	: No
Use advanced configuration	: No	Select Mail Profile	: tdl2@aaaplautomation.com
Use effective dates for vouchers	: No	Mail Payment Advice ?	Yes
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		
Track Additional Costs for Purchases	: No		
Enable default accounting allocations	: No		
Position Index in Reports	: 20		
			Accept ?
			Yes or No

5. Enter payment Voucher. Set Option “Yes” to “Send E-Mail:” as shown below & Save Voucher.

Accounting Voucher Creation
Alpha Infotech

Payment	No. 4	30-Nov-21 Tuesday
Account	: HDFC Bank	
Current balance	: 18,20,006.00 Dr	

Particulars	Amount
Amin Digital Services <i>Cur Bal: 5,23,961.05 Dr</i>	4,00,000.00
Narration:	4,00,000.00

Send E-Mail : Yes

Accept ?
Yes or No

6. After Accepting/Saving the Voucher, E-Mail window will open as below.

E-mail

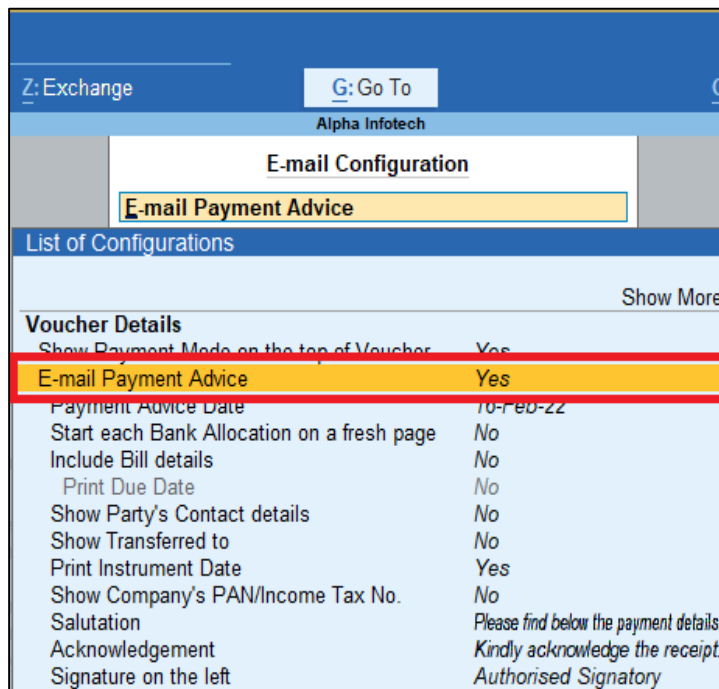
Title : **Payment Voucher**
 E-mail Payment Advice : **No**

E-mail from : mail@aaplautomation.com
 E-mail to : tdl2@aaplautomation.com
 Subject : Payment Voucher
 File Format : PDF (Read-only document)
 E-mail report as : As Attachment
 File Name : Accounting Voucher.pdf
 Number of Copies : 1

C: Configure

M: E-mail

7. Press the configure button and enable yes “E-Mail payment Advice”.



The screenshot shows the 'E-mail Configuration' window with the 'E-mail Payment Advice' option highlighted in yellow and set to 'Yes'. The window title is 'Alpha Infotech E-mail Configuration' and it contains a 'List of Configurations' table.

List of Configurations	
Show More	
Voucher Details	
Show Payment Made on the top of Voucher	Yes
E-mail Payment Advice	Yes
Payment Advice Date	10-Feb-22
Start each Bank Allocation on a fresh page	No
Include Bill details	No
Print Due Date	No
Show Party's Contact details	No
Show Transferred to	No
Print Instrument Date	Yes
Show Company's PAN/Income Tax No.	No
Salutation	Please find below the payment details.
Acknowledgement	Kindly acknowledge the receipt.
Signature on the left	Authorised Signatory

- To E- Mail payment advice, E-Mail Address will automatically pick up from Party Ledger. Press E-Mail button, now payment advice will be automatically E-Mail to the Party.

FAQ

Which version/release of Tally Prime 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.