

 **TallyPrime 4.1**  
**Simply Professional**



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**NEW** **Simplified MSME Payments**

**Intuitive and Powerful Dashboards**

**Excel Import Function**

**TallyPrime with WhatsApp**





Unlock data visualization with unlimited Dashboards in the way that you and your business prefer. Expect the same power in Dashboards as that of Tally's reports. Drill down to get a microscopic view of your data as graphs, numbers, or a combination of both, in real time. Dashboard within TallyPrime comprises multiple reports, each referred to as a 'tile', that will help business owners analyse the following details:

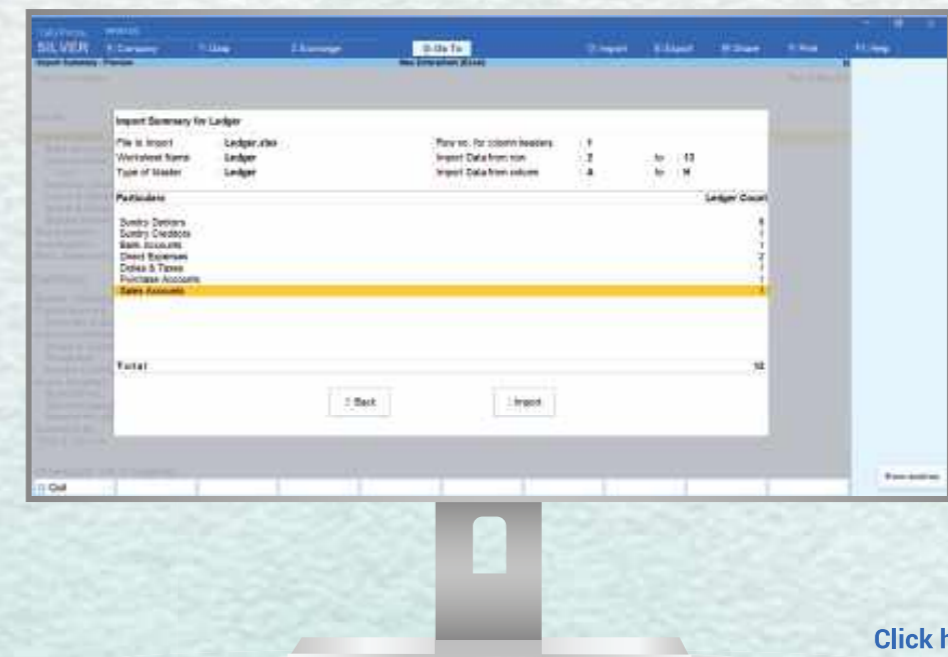
- ✓ **Receivable / Payables:** Stay up to date with your cash and bank balances.
- ✓ **Trading Details:** Get an overview of the profits gained/losses incurred, income and expenses, sales and purchases made for a given period.
- ✓ **Trends:**
  - ◆ **Sales / Purchases Trend:** Get the month-on-month sales or purchases.
  - ◆ **Stock Item / Stock Group Trend:** Get a view of how a specific stock item or stock group is performing month on month.
- ✓ **Cash / Bank Accounts or Cash In / Out Flow Tiles:** View summary of cash / bank balances to monitor incomes and expenses, and plan accordingly.
- ✓ **Top X Tiles such as Groups / Ledgers, Stock Items, Cost Centres:** Find out your top buyers or sellers, top performing items, top performing salesman (maintained as cost centres).
- ✓ **GST Liability / ITC:** Get info on the tax payable vs claimable ITC.
- ✓ **Inventory Details:** Get an overview of total inwards, outwards and closing stock as on date.
- ✓ **Assets / Liabilities:** Get an overview of the financial health of the business.
- ✓ **Accounting Ratios:** Get clarity on the course of business for a particular financial year with info on the accounts and take informed decisions for the current fiscal.
- ✓ **Comparison Tiles:** Compare profits of various company branches at a time.
- ✓ **Gross Profit Trend:** Compare the gross profits for two different financial years or get the month-on-month info for both the financial years.
- ✓ **Controlled Access:** Based on user roles, easily restrict, or control the access to reports that can be viewed as tiles in Dashboard.
- ✓ **Communicate Easily:** Print and share dashboards with stakeholders via e-mail or WhatsApp.
- ✓ **Customisability of Dashboards:** Add, configure, or remove tiles from dashboard as per the need of analysis and save as many views as required by different users in the business. Always be on top of your business data by setting dashboard as home screen of Tally.

[Click here to access video](#)

## Easily Migrate Data from Multiple Sources with Excel Import Function

Navigating complexities in today's business environment is no small feat, especially with ever-increasing systems. Now, simplify the process of migrating data from multiple sources into TallyPrime with Excel Import function - a solution designed to help you import virtually any excel document that you want to with Tally's trademark simplicity.

- ✓ **Easy Masters and Transactions Import**
  - ◆ Effortlessly import masters and transactions maintained in Excel to TallyPrime.
  - ◆ Import Excel data with specific master and transaction formats, and easily map the details to TallyPrime fields.
  - ◆ Whether you have multiple branches or business points, importing transactions like Sales and Receipts from Excel to TallyPrime is a simple and efficient solution, eliminating the need for manual data entry.
  - ◆ Your field staff and distributors can now provide data in Excel format, which can be seamlessly integrated into TallyPrime using the new feature.
  - ◆ Share your financial data in the Excel format, allowing your auditors to seamlessly import it into TallyPrime without any hassle.
- ✓ **Sample Excel Template Access:** Access a pre-defined sample Excel template in TallyPrime for importing masters and transactions. Simply update the details in Excel and import it into the system.
- ✓ **Error Handling During Import:** Import logs are generated to identify and address any errors that may occur during the import process.



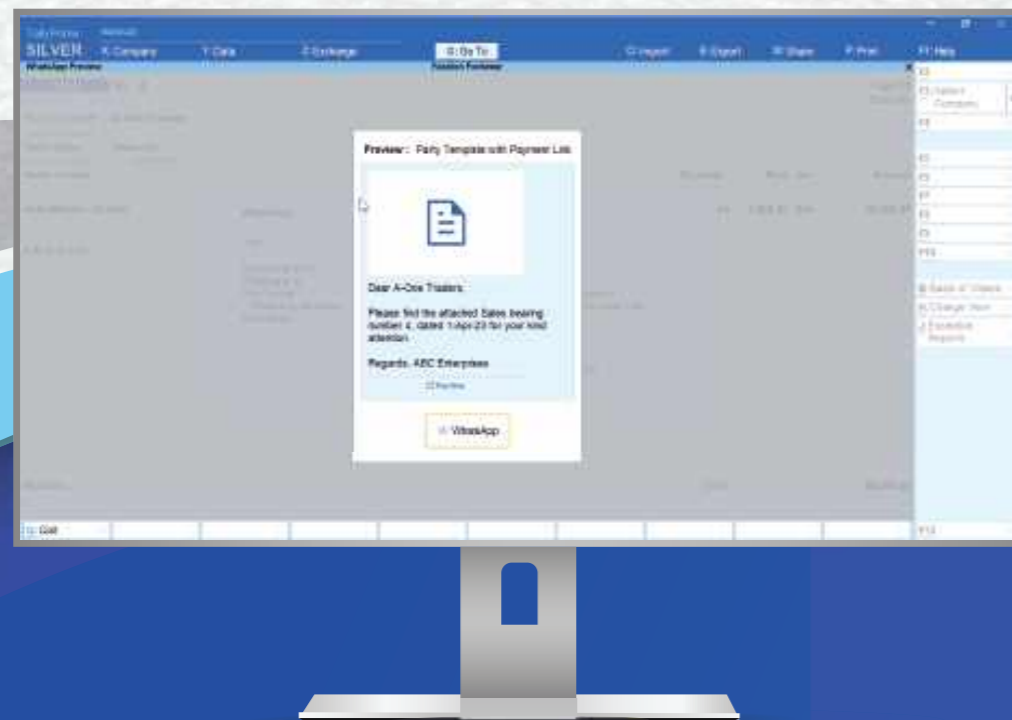
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# Engage with Customers Professionally with TallyPrime with WhatsApp

Integration with Meta's official business APIs brings you instant and professional business communication via WhatsApp for Business. So, your business communications with customers will be more professional, swift, and secure. Both confidentiality and agility in business communications are guaranteed.

To begin using TallyPrime with WhatsApp, first set up your WhatsApp Business Account (WABA). Please reach out to your Tally partner to get help with the onboarding process.

- ✓ **All-in-one Connectivity:** Quickly share invoices, orders, reports, and any other documents directly from TallyPrime to one or more parties in one click.
- ✓ **Streamlined Business Communication:** Easily add one or more registered business WhatsApp numbers to your company data for smooth communication.
- ✓ **Convenient Payment Options:** Easily send invoices with a payment link and QR code through the message template, including a 'Pay Now' option, which simplifies the payment process and boosts the chances of receiving payments promptly.
- ✓ **Digitally Signed Documents:** Now send digitally signed financial statements to investors and key stakeholders through WhatsApp.
- ✓ **Efficient document Sharing and Personalisation:** Share documents swiftly with pre-approved templates, thereby enabling personalised messages with dynamic elements like the customer's name and invoice details.
- ✓ **Safety and Security:** TallyPrime with WhatsApp for Business offers safe and secure communication, ensuring the security and confidentiality of financial discussions and document sharing.
- ✓ **Centralised Customer Message Management:** Access a dedicated WhatsApp inbox to view and manage all incoming messages from customers, ensuring that no messages go unnoticed.
- ✓ **Boost Sales and Customer Loyalty:** Use WhatsApp Inbox to send personalised messages, promotions, and offers to customers based on their preferences and past interactions.



## Other enhancements and capabilities you must not miss:

- ◆ Easily access TallyPrime powered by AWS and TallyEdge by navigating from the F1(Help) menu in TallyPrime 4.0
- ◆ You can now export the following e-return text files according to the latest FVU Tool 8.2: Salary TDS Form 24Q, TDS Form 26Q, TDS Form 27Q, TCS Form 27EQ
- ◆ QRMP dealers can now export GSTR-3B for a quarter in a single JSON file and then upload on the GST portal to file GSTR-3B
- ◆ Invoice printing is more result-oriented now, as you can print an invoice for a party with the previous and current balances, as applicable at the time of printing

## FAQs

### What is TallyPrime 4.0?

#### What are the new features of TallyPrime Release 4.0?

Reports dashboard, TallyPrime with WhatsApp for Business, Import data from Excel to TallyPrime.

#### What is the cost of upgrading to TallyPrime Release 4.0?

Enjoy a free upgrade to TallyPrime 4.0 with a valid TSS subscription. Renew your TSS subscription if it has expired.

#### How do I upgrade to the latest release?

- ◆ Press **Alt + U** to upgrade to the latest release
- ◆ Select **'Upgrade Now'**
- ◆ Select the **latest release** and **install**



[Click here to access video](#)