InstaAgent

Code -ITA006

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!!!

InstaAgent

➢ Sales is the most important part of organization

➢ Salesman and his/her productivity needs to be measured.

➢ Many organizations also couple recovery with Salesman

➢ This TDL provides all these aspects

InstaAgent – Features...

➢ Easy to use. Minimal settings.

➢ Each Invoice earmarks a Salesman and automatically outstanding is allocated.

➢ Outstanding Statement can be filtered Salesman-wise.
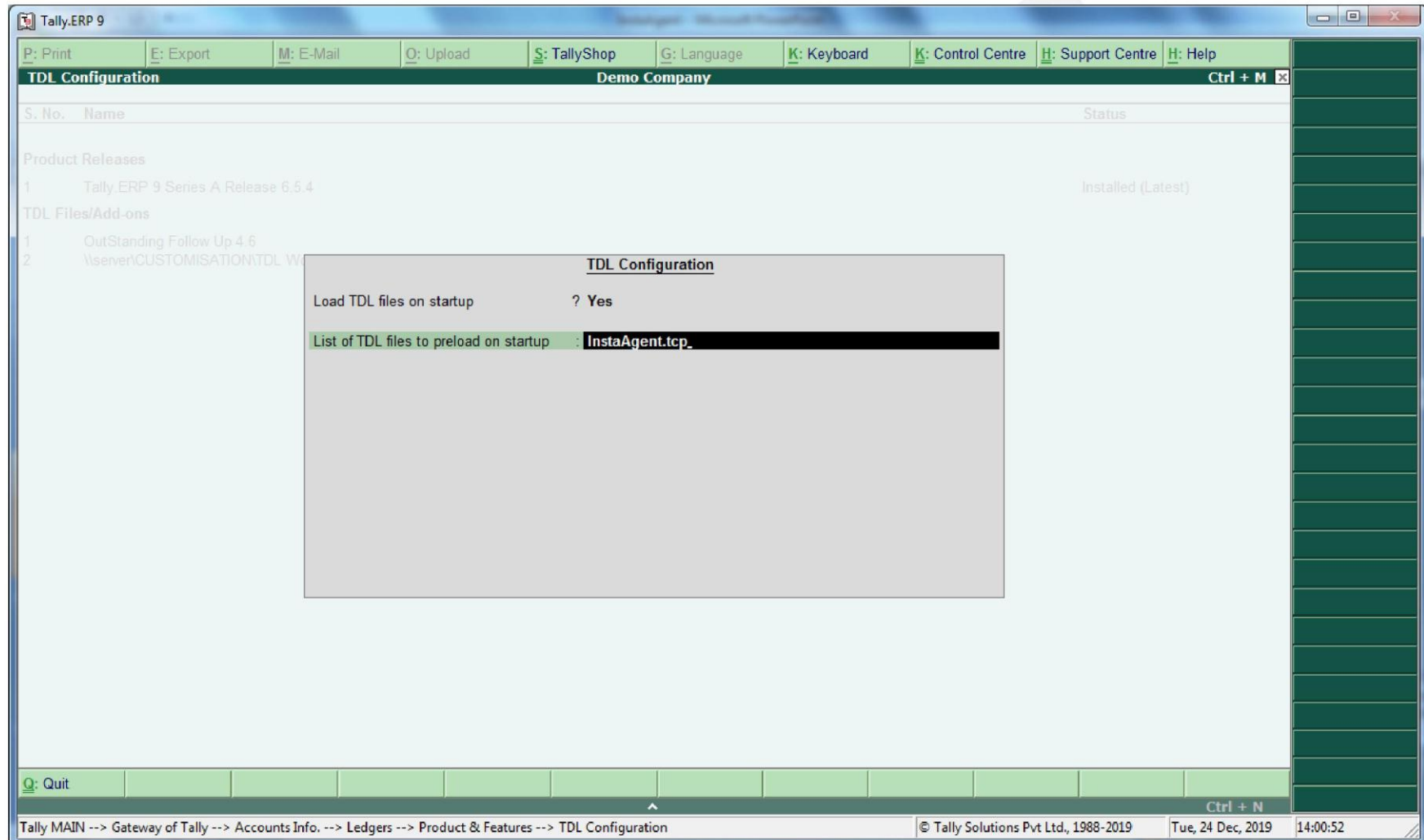
➢ Salesman-wise Sales is also shown in a separate report.

Steps to Use

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)

Create a Group as Salesman under Current Liabilities.

Create a Ledger of a salesman under the group Salesman.

Allot a salesman to a particular customer by selecting a saleman name from the table.

Mention Salesman's commission.

While creating sales voucher, allotted salesman's name is displayed as salesman name by default. It can be altered by selecting another salesman's name from the table.

Use defaults for Bill Allocations option in configuration must be set to No.

Salesman name will also appear on Bill Allocations screen.

Salesman Name is displayed on invoice.

Tax Invoice

Demo Company Kolhapur GSTIN/UIN: 27ABYPK2145A1Z5 State Name : Maharashtra, Code : 27	Invoice No. **1274**	Dated **26-Oct-2019**
	Delivery Note	Mode/Terms of Payment **1 Days**
	Supplier's Ref.	Other Reference(s)
Buyer **Kumar Rane** Kolhapur State Name : Maharashtra, Code : 27	Buyer's Order No.	Dated
	Despatch Document No.	Delivery Note Date
	Despatched through	Destination
	Terms of Delivery	

Salesman   : Prafull Patil

Sl No.	Description of Goods	HSN/SAC	Quantity	Rate	per	Disc. %	Amount
1	**KEYBORD**	5555	**1 No**	254.24	No		**254.24**
	CGST						22.88
	SGST						22.88
	Total		**1 No**				**₹ 300.00**

Similarly, salesman name can be selected from table on POS voucher.

Salesman wise sales report with Salesman Filter is available in –
Display(D)> My Reports(M)> Salesman wise sales(S)

Tally.ERP 9

F2: Period
F1: Detailed
F6: SalesmanFilter

Salesmanwise Sales   **Demo Company**   Ctrl + M ☒

Salesman wise Sales Summary - from 1-Oct-2019 to 31-Oct-2019

Date	Bill No	Particulars	Salesman	Basic Amount	Invoice Amt
1-10-2019	1258	Kedar Arts	Mrunal Kamat	10,169.49	12,000.00
1-10-2019	1259	Kolhapur Seva Kendra	Pranjal Shinde	508.48	600.00
12-10-2019	1260	Kolhapur Suger	Satish Wagh	25,423.73	30,000.00
24-10-2019	1261	Kumar Rane	Praful Patil	29,661.02	35,000.00
24-10-2019	1262	Kumar Rane	Praful Patil	30,000.00	35,400.00
24-10-2019	1263	Kolhapur Seva Kendra	Mrunal Kamat	33,898.31	40,000.01
24-10-2019	1264	Kumar Rane	Pranjal Shinde	33,898.31	40,000.01
24-10-2019	1265	Kumar Rane	Praful Patil	42,372.88	50,000.00
24-10-2019	1266	Kumar Rane	Praful Patil	6,779.66	8,000.00
24-10-2019	1267	Raj Pc Store	Mrunal Kamat	59,322.04	70,000.00
24-10-2019	1268	Omkar Foods	Satish Wagh	33,898.31	40,000.00
25-10-2019	1269	Omkar Raut	Pranjal Shinde	29,661.02	35,000.00
25-10-2019	1270	Manish Pande	Mrunal Kamat	12,711.86	15,000.00
26-10-2019	1271	Sagar Auto	Pranjal Shinde	25,677.96	30,300.00
26-10-2019	1272	Kedar Arts	Satish Wagh	254.24	300.00
26-10-2019	1	Cash	Praful Patil	13,220.34	15,600.00
26-10-2019	2	Cash	Pranjal Shinde	254.24	300.00
26-10-2019	3	Cash	Satish Wagh	7,966.10	9,400.00
26-10-2019	4	Cash	Pranjal Shinde	3,813.56	4,500.00
26-10-2019	1273	Kumar Rane	Praful Patil	3,813.56	4,500.00
26-10-2019	1274	Kumar Rane	Praful Patil	254.24	300.00
		Total Sales		**4,03,559.35**	**4,76,200.02**

Ctrl + N

Tally MAIN --> Gateway of Tally --> Display Menu --> My Menu --> Salesmanwise Sales

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Salesman filter gives you the option to select a particular salesman.

It displays the sale record of a particular salesman.

Date	Bill No	Particulars	Salesman	Basic Amount	Invoice Amt
24-10-2019	1261	Kumar Rane	Prafull Patil	29,661.02	35,000.00
24-10-2019	1262	Kumar Rane	Prafull Patil	30,000.00	35,400.00
24-10-2019	1265	Kumar Rane	Prafull Patil	42,372.88	50,000.00
24-10-2019	1266	Kumar Rane	Prafull Patil	6,779.66	8,000.00
26-10-2019	1	Cash	Prafull Patil	13,220.34	15,600.00
26-10-2019	1273	Kumar Rane	Prafull Patil	3,813.56	4,500.00
26-10-2019	1274	Kumar Rane	Prafull Patil	254.24	300.00
		Total Sales		**1,26,101.70**	**1,48,800.00**

Tally MAIN --> Gateway of Tally --> Display Menu --> My Menu --> Salesmanwise Sales

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Salesman wise outstanding report is also available in –
Display (D)> Statements of Accounts (S)> Outstanding (O)> Receivables(R)

		Tally.ERP 9													

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 | | F1: Detailed |

Bills Outstanding   **Demo Company**   Ctrl + M ☒

F2: Period

Bills Receivable   **1-Apr-2019 to 26-Oct-2019**

F3: Company

Date	Ref. No.	Party's Name	Pending Amount	Due on	Overdue by days	Mobile Number	Name of Salesman
1-Sep-2019	1256	Hotel Potbhar	20,520.00	2-Sep-2019	54	9987665412	Mrunal Kamat
1-Sep-2019	1257	Raj Pc Store	55,300.00	8-Sep-2019	48	9871234560	Satish Wagh
1-Oct-2019	1257	Kedar Arts	12,000.00	1-Oct-2019	25	9987456654	Mrunal Kamat
1-Oct-2019	1258	Kolhapur Seva Kendra	40,600.01	8-Oct-2019	18	7789564412	Pranjal Shinde
12-Oct-2019	1259	Kolhapur Suger	30,000.00	12-Oct-2019	14	7789458879	Satish Wagh
24-Oct-2019	1259	Kumar Rane	40,000.01	25-Oct-2019	1	8788457916	Pranjal Shinde
24-Oct-2019	1260	Kumar Rane	50,000.00	25-Oct-2019	1	8788457916	Prafull Patil
24-Oct-2019	1266	Kumar Rane	8,000.00	25-Oct-2019	1	8788457916	Prafull Patil
24-Oct-2019	1268	Omkar Foods	40,000.00	24-Oct-2019	2	9954687123	Satish Wagh
24-Oct-2019	1267	Raj Pc Store	70,000.00	31-Oct-2019		9871234560	Mrunal Kamat
25-Oct-2019	1270	Manish Pande	15,000.00	1-Nov-2019		7789456123	Mrunal Kamat
25-Oct-2019	1266	Omkar Raut	35,000.00	25-Oct-2019	1	7896541235	Pranjal Shinde
26-Oct-2019	1267	Kedar Arts	300.00	26-Oct-2019	0	9987456654	Satish Wagh
26-Oct-2019	1273	Kumar Rane	4,500.00	27-Oct-2019		8788457916	Prafull Patil
26-Oct-2019	1274	Kumar Rane	300.00	27-Oct-2019		8788457916	Prafull Patil
26-Oct-2019	1266	Sagar Auto	30,300.00	27-Oct-2019		9877546689	Pranjal Shinde

F4: Payable

F6: Age wise

F7: Bill-Party wise

F8: Salesman

4,51,820.02

F8: Related Reports

F9: Inventory Reports

F10: A/c Reports

F11: Features

F12: Configure

F12: Range

F12: Value

| Q: Quit | | | | | R: Remove Line | U: Restore Line | U: Restore All | Space: Select |

Ctrl + N

Tally MAIN --> Gateway of Tally --> Display Menu --> Statements of Accounts --> Outstandings --> Bills Outstanding   © Tally Solutions Pvt Ltd., 1988-2019   Mon, 30 Dec, 2019   11:49:09

It also has the Salesman Filter to select a particular Salesman.

It displays the list of outstanding bills for that particular salesman.

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

Bills Outstanding Demo Company Ctrl + M ⊠

Bills Receivable 1-Apr-2019 to 26-Oct-2019

Date	Ref. No.	Party's Name	Pending Amount	Due on	Overdue by days	Mobile Number	Name of Salesman
1-Sep-2019	1256	Hotel Potbhar	20,520.00	2-Sep-2019	54	9987665412	Mrunal Kamat
1-Oct-2019	1257	Kedar Arts	12,000.00	1-Oct-2019	25	9987456654	Mrunal Kamat
24-Oct-2019	1267	Raj Pc Store	70,000.00	31-Oct-2019		9871234560	Mrunal Kamat
25-Oct-2019	1270	Manish Pande	15,000.00	1-Nov-2019		7789456123	Mrunal Kamat

1,17,520.00

Q: Quit					R: Remove Line	U: Restore Line	U: Restore All	Space: Select

Ctrl + N

Tally MAIN --> Gateway of Tally --> Display Menu --> Statements of Accounts --> Outstandings --> Bills Outstanding   © Tally Solutions Pvt Ltd., 1988-2019   Mon, 30 Dec, 2019   11:49:53

Side panel:
F1: Detailed
F2: Period
F3: Company
F4: Payable
F6: Age wise
F7: Bill-Party wise
F8: Salesman
F8: Related Reports
F9: Inventory Reports
F10: A/c Reports
F11: Features
F12: Configure
F12: Range
F12: Value

Thank You!