

# Insta D-Sign

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Code -ITA003

# **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!!!**

# Insta D-Sign

- The Module provides Digital Sign to every outgoing document.
- Digital Invoicing can save costs ,time and efforts.
- A Digital signature is mandatory by GST Act on all Invoices sent through e-mail. \*\*

**\*\* Most important \*\***

# Insta D-Sign

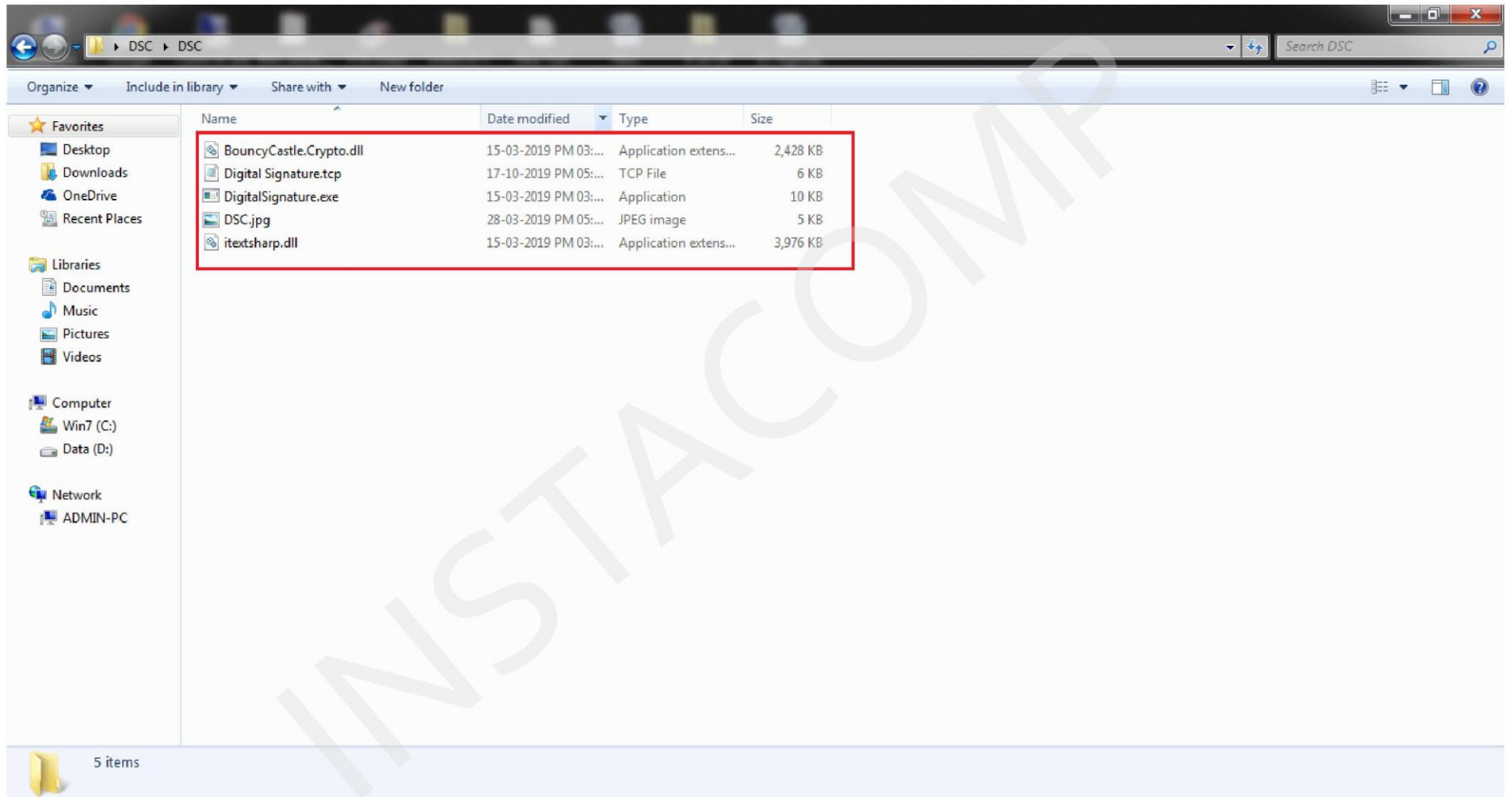
- Auto creation of digitally signed invoices.
- Digitally Signed Invoice can be authenticated
- The signed and unsigned PDF copy is moved to a backup folder for Safety.

# Steps to Install

## **Note:**

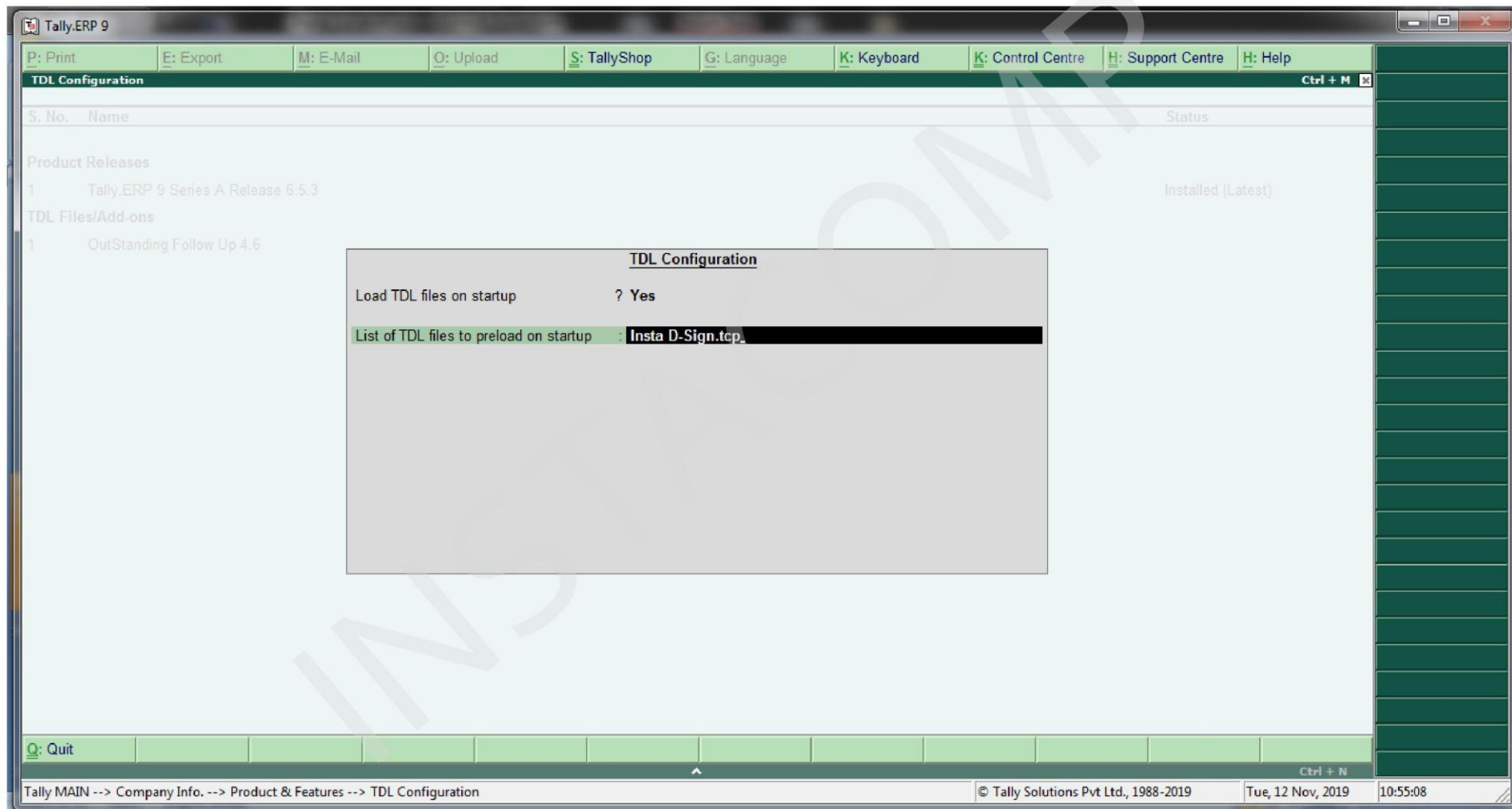
- ❖ **To start the digital signature usage in Tally.ERP9, the Digital Signature lock must be installed.**
- ❖ **As a best practice it is advisable to take back up your company data before installing the Add-on.**

## Add supporting files in Tally.ERP9 folder (Absolutely essential)



Attach TCP file to Tally.ERP9.

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



Select option to add Digital Signature on your invoice.

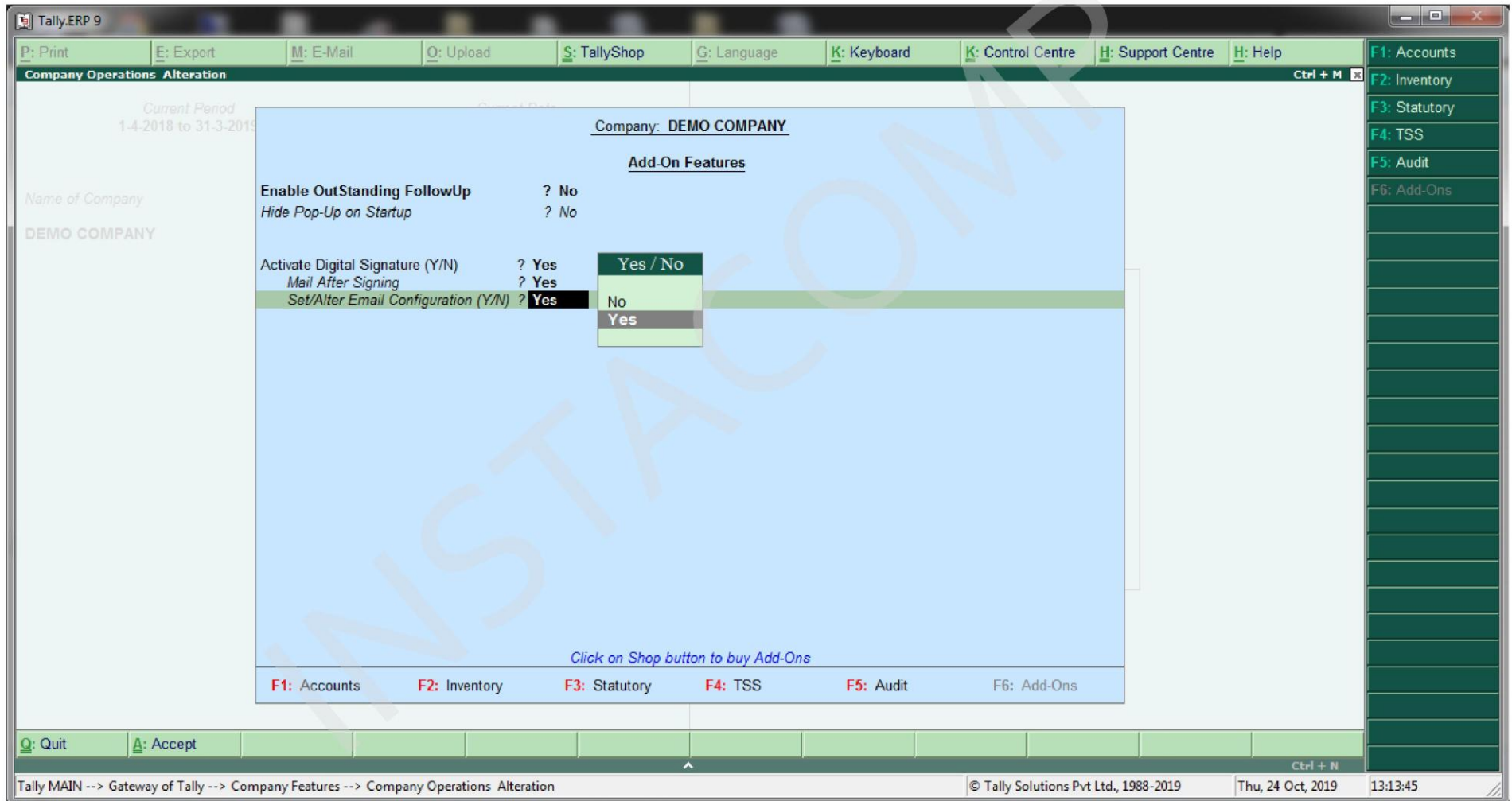
Gateway of Tally > Features(F11) > Add ons(F6)

The screenshot shows the 'Add-On Features' dialog box in Tally.ERP 9. The dialog is titled 'Company: DEMO COMPANY' and 'Add-On Features'. It contains a list of features with checkboxes and a 'Yes/No' selection box. The 'Activate Digital Signature (Y/N)' feature is highlighted in green, and its 'Yes' option is selected in the 'Yes/No' box. The dialog also displays a table of features with their rates and amounts.

Name of Item	Rate	per Disc %	Amount
Demo	423.73	NO	4,237.30
Cgst			381.36
Sgst			381.36

At the bottom of the dialog, there is a row of function keys: F1: Accounts, F2: Inventory, F3: Statutory, F4: TSS, F5: Audit, and F6: Add-Ons. The status bar at the bottom of the window shows the current path: Tally MAIN --> Gateway of Tally --> Display Menu --> Day Book --> Accounting Voucher Alteration (Secondary) --> Company O... and the date/time: Thu, 24 Oct, 2019 14:14:13.

On same screen select the option for sending an automatic email with digitally signed invoice.



If you wish to send an email, select the option to set/alter email configuration. When selected Yes, following screen will appear. Enter all the required details.

The screenshot shows the Tally.ERP 9 interface with the 'mDSignConfiguration' window open. A dialog box titled 'E-Mail Configuration' is displayed in the foreground, containing the following fields:

Field	Value
Email Server Name	smtp.gmail.com
Email Port	587
Use SSL	Yes
From Email Address	Demo@gmail.com
Email Name	Demo@gmail.com
Email Username	Demo@gmail.com
Email Password	*
Email Subject	Test DSC
Email Message	Test

The background window shows the 'mDSignConfiguration' settings for 'DEMO COMPANY'. The 'Add-On Features' section includes options like 'Enable OutStanding FollowUp' and 'Hide Pop-Up on Startup', both set to 'No'. The 'E-Mail Configuration' option is selected, and the 'Set/Alter Email Configuration' button is highlighted. The status bar at the bottom indicates the current path: 'Tally MAIN --> Gateway of Tally --> Company Features --> Company Operations: Alteration --> mDSignConfiguration'. The footer shows the copyright information: '© Tally Solutions Pvt Ltd, 1988-2019' and the date/time: 'Thu, 24 Oct, 2019 13:13:22'.



Set the 'Use digital signature while printing' option to Yes on all the required voucher types window.

The screenshot shows the 'Voucher Type Alteration' window in Tally.ERP 9 for 'DEMO COMPANY'. The voucher name is 'Sales'. The window is divided into three main sections: General, Printing, and Name of Class.

General	Printing	Name of Class
Select type of voucher : Sales	Print voucher after saving ? No	
Abbreviation : Sale		
Method of voucher numbering ? Automatic	Use for POS invoicing ? No	
Use advanced configuration ? No	Default title to print :	
Use effective dates for vouchers ? No	Default bank : J Not Applicable	
Make this voucher type as 'Optional' by default ? No	Default jurisdiction :	
Allow narration in voucher ? Yes	Use as tax invoice ? No	
Provide narrations for each ledger in voucher ? No	Set/alter declaration ? No	
Enable default accounting allocations ? No		
Set/Alter Default Accounting Entries ? No		
Position Index in Reports : 70		
<b>Use Digital Signature while Printing ? Yes</b>		

The 'Use Digital Signature while Printing' option is highlighted with a red box and is set to 'Yes'.

Footer: Tally MAIN --> Gateway of Tally --> Accounts Info. --> Voucher Types --> Voucher Type Alteration | © Tally Solutions Pvt Ltd, 1988-2019 | Thu, 24 Oct, 2019 | 13:15:20

Set the configuration for Digital Signature invoice location.

## Setting for Voucher Types Sales, Sales Order, Delivery Note, Credit Note, Purchase, Purchase Order

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

DGSpec DEMO COMPANY Ctrl + M

English  
Name : Office Invoice

General Printing Name of Class

Select type of voucher : Sales  
Abbreviation : Sale

Method of voucher numbering ? Automatic  
Use advanced configuration ? No

Use effective dates for vouchers ? No  
Make this voucher type as 'Optional' by default ? No  
Allow narration in voucher ? Yes  
Provide narrations for each ledger in voucher ? No

Enable default accounting allocations ? No  
Set/Alter Default Accounting Entries ? No  
Position Index in Reports : 70  
Use Digital Signature while Printing ? Yes

Signature On Page : First Page  
X (Space from Bottom) : 340  
Y (Space from Bottom Left) : 190  
Signature Reason : I Approve  
Location : Kolhapur  
Signature Visible : Yes  
Signature with Image : Yes  
Signature Image : D:\Tally.ERP9\DSC.jpg  
PDF Export Location : D:\DSC  
Paper Size : A4

X:Right(+)-Left(-)  
Y:UP(+)-Down(-)

Q: Quit Ctrl + N

Tally MAIN --> Gateway of Tally --> Accounts Info. --> Voucher Types --> Voucher Type Alteration --> DGSpec © Tally Solutions Pvt Ltd., 1988-2019 Fri, 25 Oct, 2019 13:33:26

# Setting for Voucher Types Payment, Receipt, Journal

The screenshot shows the Tally.ERP 9 interface for setting voucher types. The main window is titled "DGSPEC" and "DEMO COMPANY". The "Name" field is set to "Receipt". The "General" tab is active, showing various settings for the voucher type. A dialog box is open over the "Printing" section, allowing for detailed configuration of the signature area. The dialog box contains the following fields and options:

Field	Value
Signature On Page	Last Page
X (Space from Bottom)	130
Y (Space from Bottom Left)	315
Signature Reason	Done
Location	Kolhapur
Signature Visible	Yes
Signature with Image	Yes
Signature Image	D:\Tally.ERP9\DSC.jpg
PDF Export Location	D:\DSC
Paper Size	A4

Navigation keys for the dialog box are indicated: X: Right(+)-Left(-) and Y: UP(+)-Down(-). The background settings in the "General" tab include: Select type of voucher: Receipt; Abbreviation: Rcpt; Method of voucher numbering: Automatic; Use advanced configuration: No; Use effective dates for vouchers: No; Make this voucher type as 'Optional' by default: No; Allow narration in voucher: Yes; Provide narrations for each ledger in voucher: No; Enable default accounting allocations: No; Set/Alter Default Accounting Entries: No; Position Index in Reports: 30; Use Digital Signature while Printing: Yes.

The status bar at the bottom shows: Tally MAIN --> Gateway of Tally --> Accounts Info. --> Voucher Types --> Voucher Type Alteration --> DGSPEC. Copyright: © Tally Solutions Pvt Ltd., 1988-2019. Date: Fri, 25 Oct, 2019. Time: 14:14:15.

Set the configuration for Digital Signature file with or without check mark; also set the signature image path & export location.

The screenshot displays the Tally.ERP 9 interface for configuring a Digital Signature file. The window title is 'Tally.ERP 9' and 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', and 'H: Help'. The main window shows the 'DGSPEC' configuration for 'DEMO COMPANY' and 'Office Invoice'. The 'Printing' tab is active, and a yellow dialog box is open over the 'Signature with Image' section. This section is highlighted with a red border and contains the following settings:

Signature On Page	: First Page
X (Space from Bottom)	: 340
Y (Space from Bottom Left)	: 190
Signature Reason	: I Approve
Location	: Kolhapur
Signature Visible	: Yes
Signature with Image	: Yes
Signature Image	: D:\Tally.ERP9\DSC.jpg
PDF Export Location	: D:\DSC
Paper Size	: A4

The background configuration shows various options under the 'General' tab, such as 'Select type of voucher : Sales', 'Abbreviation : Sale', 'Method of voucher numbering : Automatic', and 'Use advanced configuration : No'. The status bar at the bottom indicates 'Tally MAIN --> Gateway of Tally --> Accounts Info. --> Voucher Types --> Voucher Type Alteration --> DGSPEC', the copyright notice '© Tally Solutions Pvt Ltd, 1988-2019', the date 'Fri, 25 Oct, 2019', and the time '13:33:26'.

After saving the voucher, if you wish to digitally sign the invoice, select the Digital Signature (Ctrl +1) button on the button bar.

**Tally.ERP 9**

**Accounting Voucher Alteration (Secondary)** DEMO COMPANY **Ctrl + M**

**Office Invoice** No. 1101 **13-Mar-2019** Wednesday

Reference no.:

Party A/c name : Kumar Rane  
Current balance : 5,000.02 Dr

Name of Item	Quantity	Rate (Incl. of Tax)	Rate per	Disc %	Amount
Demo No. of packages:	10 NO	500.00	423.73	NO	4,237.30
Cgst					381.36
Sgst					381.36
Narration:					10 NO <b>5,000.02</b>

**1: Digital Signature**

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

Tally MAIN --> Gateway of Tally --> Display Menu --> Day Book --> Accounting Voucher Alteration (Secondary) © Tally Solutions Pvt Ltd., 1988-2019 Thu, 24 Oct, 2019 14:05:11

Select the Digital Signature certificate and press Ok.

The screenshot shows the Tally.ERP 9 interface with a 'Confirm Certificate' dialog box open. The dialog box contains the following information:

- Issuer: (n)Code Solutions CA 2014
- Valid From: 01-08-2018 to 31-07-2020
- Click here to view certificate prope...

The 'OK' button in the dialog box is highlighted with a red rectangle. The background window displays an 'Office Invoice' for 'DEMO COMPANY' dated 13-Mar-2019. The invoice details include:

- Reference no.: No. 1101
- Party A/c name: Kumar Rane
- Current balance: 5,000.02 Dr

Name of Item	Quantity	Rate (Incl. of Tax)	Rate per	Disc %	Amount
Demo		500.00	423.73	NO	4,237.30
Cgst					381.36
Sgst					381.36
Narration:					5,000.02

The bottom status bar shows the navigation path: Tally MAIN --> Gateway of Tally --> Display Menu --> Day Book --> Accounting Voucher Alteration (Secondary). The footer includes the copyright notice: © Tally Solutions Pvt Ltd., 1988-2019, the date: Thu, 24 Oct, 2019, and the time: 14:06:25.

# Enter the Digital Signature password.

The screenshot displays the Tally.ERP 9 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 'Accounting Voucher Display' window for 'DEMO COMPANY' on '13-Mar-2019 Wednesday'. The voucher is an 'Office Invoice' No. 1101. The party name is 'Kumar Rane' and the current balance is '5,000.02 Dr'. A table lists items with columns for Name of Item, Quantity, Rate (Incl. of Tax), Rate per, Disc %, and Amount. The items are 'Demo' (10 NO, 500.00, 423.73 NO, 4,237.30), 'Cgst' (381.36), and 'Sgst' (381.36). A 'Narration' bar at the bottom shows a progress indicator from 0% to 100% and a total amount of 5,000.02. A 'Windows Security' dialog box is overlaid in the center, titled 'Microsoft Smart Card Provider'. It asks the user to 'Please enter your digital signature PIN.' and features a PIN input field, an 'OK' button, and a 'Cancel' button. A red box highlights the PIN input field, and another red box highlights the 'OK' button. The status bar at the bottom shows the navigation path: Tally MAIN --> Gateway of Tally --> Display Menu --> Day Book --> Accounting Voucher Alteration (Secondary), copyright information for Tally Solutions Pvt Ltd., 1988-2019, the date 'Thu, 24 Oct, 2019', and the time '14:07:53'.

Name of Item	Quantity	Rate (Incl. of Tax)	Rate per	Disc %	Amount
Demo No. of packages:	10 NO	500.00	423.73 NO		4,237.30
Cgst					381.36
Sgst					381.36
Narration:					5,000.02

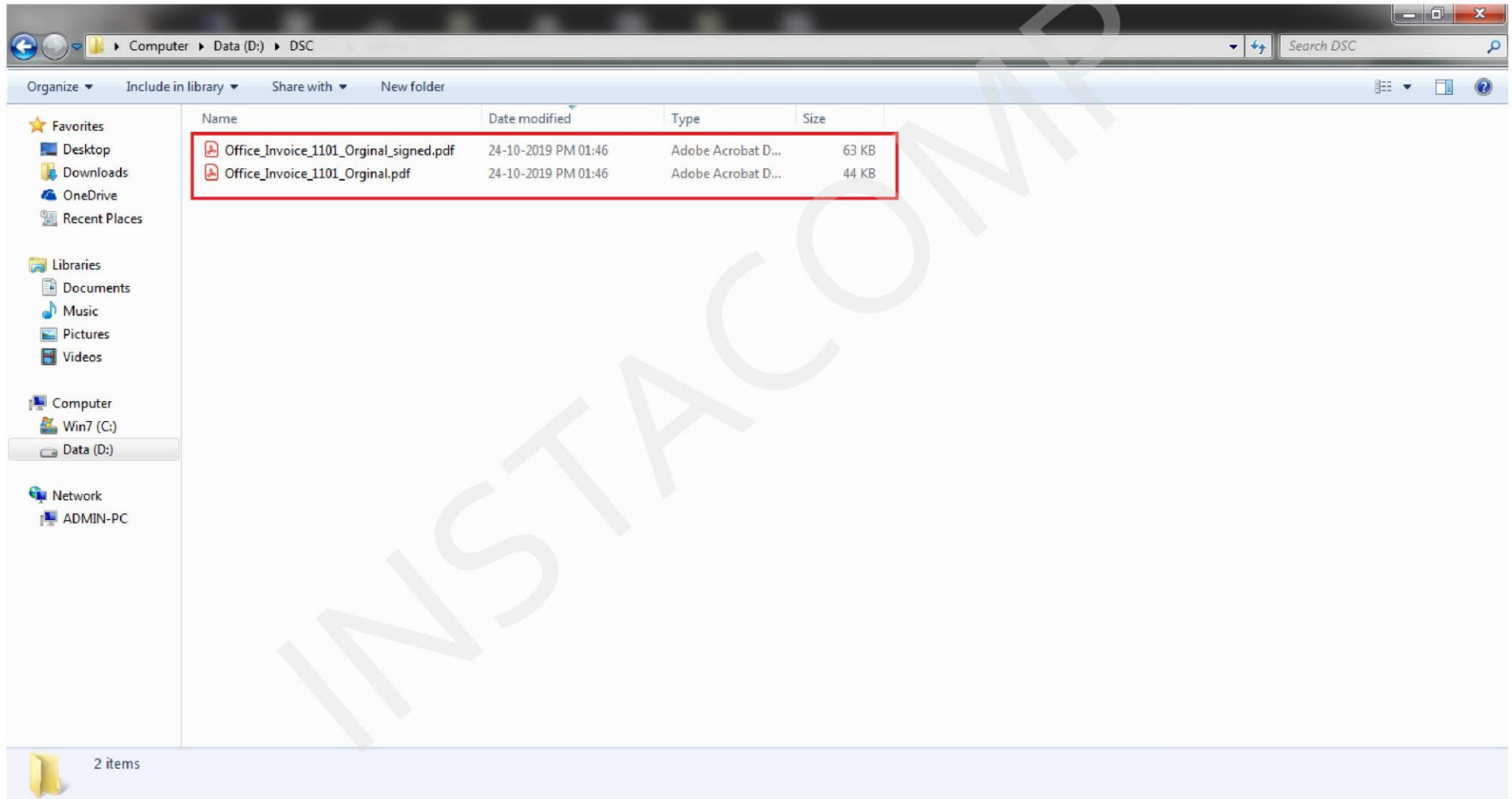
Notification will appear about successfully sent email.

The screenshot shows the Tally ERP 9:9000 interface for creating an Accounting Voucher. The window title is 'Tally.ERP 9:9000'. The menu bar includes options like Print, Export, E-Mail, Upload, TallyShop, Language, Keyboard, Control Centre, Support Centre, and Help. The main area displays 'Accounting Voucher Creation' for 'DEMO COMPANY' on '13-Mar-2019 Wednesday'. The voucher is an 'Office Invoice' No. 1101 with a reference number [REDACTED]. The party is 'Kumar Rane'. A table lists items: 'Demo' (10 NO, 423.73 NO, 4,237.30), 'Cgst' (381.36), and 'Sgst' (381.36). A 'Please Wait' dialog is overlaid on the table. A success message box is also present, stating 'Success : Mail Sent with Digital Signature.' and '(press any key)'. The bottom status bar shows 'Tally MAIN --> Gateway of Tally --> Accounting Voucher Creation', copyright information, date 'Thu, 24 Oct, 2019', and time '13:47:10'. A vertical toolbar on the right contains various function keys (F1-F12) and shortcuts (S, A, I, V, T, L).

Name of Item	Quantity	Rate	per	Disc %	Amount
Demo	10 NO	423.73	NO		4,237.30
Cgst					381.36
Sgst					381.36

Success : Mail Sent with Digital Signature.  
(press any key)

Digitally signed documents are exported in a specific folder. These exported files can be viewed in the folder mentioned at file export location.





# Thank You!

