



## Document Attach



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# Document Attach

## Introduction

This Add-on gives feature to attach Document with Vouchers.

## Description

With this Add-on we can give access rights to users, have to attach Document while creating Vouchers. And allowed user, who having access rights to attach & view can do attach Document in Vouchers. And administrator can access and attach and view document.

**And also it is accessible and can be use, if there is not enabled Security and Users in Company.**

**(Note: Be sure given path (like D:\folder\myfile.pdf), file must be available with same name always, to open/view, and for multi users Tally, given path of the file must be shared and file path has shareable path (example: \\serverID\foldername\filename.pdf).**

It stores file path only, with Tally, and same cannot be accessible if Tally Data transferred to other system have not using this Add-on and have not the file in exact path.

## Benefits

- Using this Add-on, easily find out supporting document related to vouchers.

## What's New?

In Add-on Release TPRM 1.2.1, Now we can set / fix Folder Path, which is using for Documents

### Important!

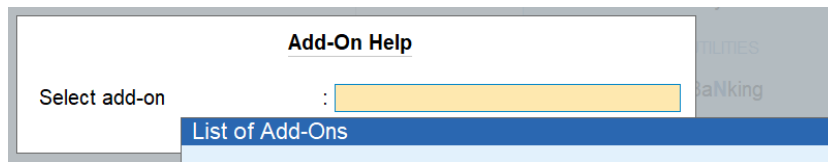
Take back up of your company data before activating the Add-on.

Once you try/purchase an Add-on, follow the steps below to configure the Add-on and use it.

## Setup Guide

1. Update your license by going to **Gateway of Tally → F1: Help → Settings → License → Manage License → F5: Update**  
(In case you are using a multi-site account, you will need to configure Tally Prime to activate the Add-on for a particular site. Click [here](#) for the steps.)
2. Shut down and Restart Tally Prime and open your company.

3. Press **Ctrl + Alt + H** at any menu screen to open the user manual. In case of multiple Add-on, **Add-On Help** screen will pop-up to select Add-on Manual.



4. 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 Document Attach?**"

**Add-On Features**

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Enable Document Attach?:

5. On set YES, it will open New Popup Form

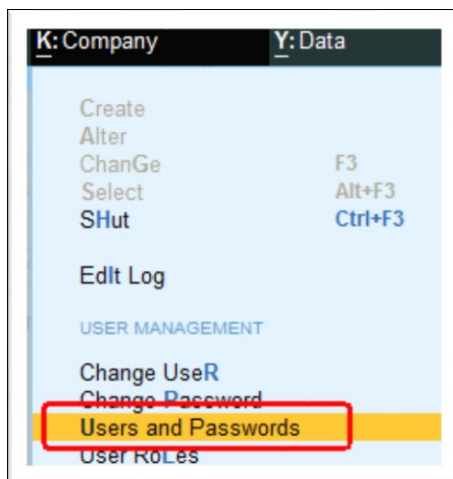
4 CCPL.tdl

**Document Folder Path (optional)**

Enter Folder Path like: \\servername\sharedfolder\ (for Multi users), or D:\AccountFolder\SubFolder\ (for single user)  
So its automatically shows fixed folder, and user will select files of the folder

11 Print LOGO in All Re  
12 ScrPnt 010119.txt  
13 Incl Tax Rate from S  
14 Partwise TotalDisc

If the company has security control enabled, and users and passwords created,  
After Enable, Login with Administrator and set rights/allow/disallow to users



**List of Users for Company**

Name: Patel Software : Tally Partner

| User Roles | Username | Password (if any) | Allow Browser Access | Allow Remote Access | Allow Local TDL Files | Allow Document Attachme | Yes / No |
|------------|----------|-------------------|----------------------|---------------------|-----------------------|-------------------------|----------|
| Owner      | b        | *                 | No                   | No                  | No                    | Yes                     | No       |
| Owner      | c        | *                 | No                   | No                  | No                    | Yes                     | Yes      |
| Data Entry | d        | *                 | No                   | No                  | No                    | No                      |          |
| Data Entry | e        | *                 | No                   | No                  | No                    | No                      |          |
| Owner      | owner    | *                 | No                   | No                  | No                    | No                      |          |
| Sales      | s        | *                 | No                   | No                  | No                    | No                      |          |

Now login with user having Document Attach Allowed;

And Create New Voucher or Alter Old Voucher, it shows a New Feature (before Narration) “**Attach Document?**”

Attach Document? : No

Narration:

Make it Yes, we get a new Line where we have to set Document Path, select from opened list



## FAQ

### **Which version/release of Tally Prime does the add-on support?**

This add-on will work only from Tally Prime Release 1.0

### **How will I get support for this add-on?**

For any functional support requirements please do write to us on [tallyplus@gmail.com](mailto:tallyplus@gmail.com) or call us at +919879992357. Alternatively, you can send a support query to [support@tallysolutions.com](mailto:support@tallysolutions.com).

### **If I need some enhancements / changes to be incorporated for the add-on, whom should I contact?**

Please to write to us on [tallyplus@gmail.com](mailto:tallyplus@gmail.com) with your additional requirements and we will revert to you in 24 business 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?**

A subscription for a year has to be renewed for the Add-On. The cost would be 20% of the MRP prevailing at that time, of the Add-On.

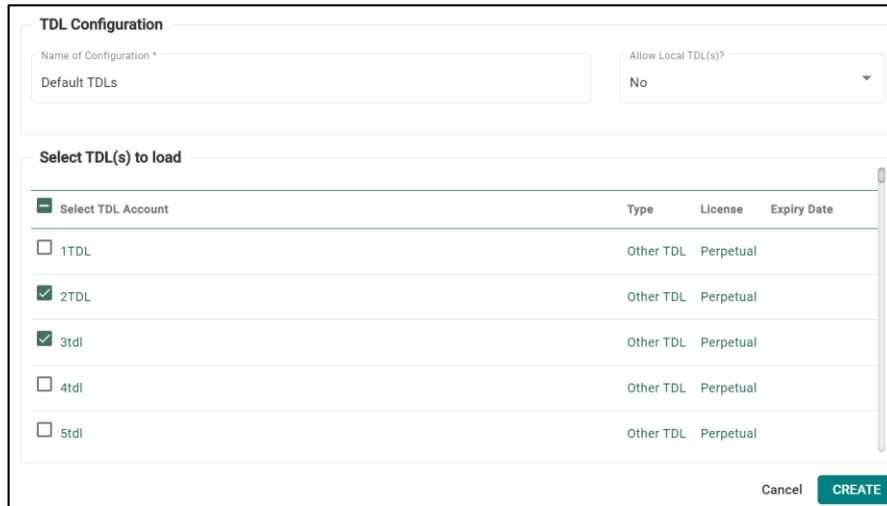
### **I am using a multi-site. Can I use the same Add-on for all the sites?**

No, one Add-on will work only for one site. You need to purchase again if you want to use the same Add-on for more sites.

### **How do I configure the add-ons for multi-site?**

If you are a Tally Prime Multi site user, add the Add-on to the required site as follows:

- a. **Gateway of Tally → F1: Help → Settings → License → Manage Account.** This shall open control center on Tally Portal / Website
- b. Go to **TDL Management → TDL Configuration → Select the site's default TDL**
- c. Under '**Select TDL Account**', select the Add-on Name and Click on Create / Accept button.



| Select TDL Account                       | Type      | License   | Expiry Date |
|--|-----------|-----------|-------------|
| <input type="checkbox"/> 1TDL            | Other TDL | Perpetual |             |
| <input checked="" type="checkbox"/> 2TDL | Other TDL | Perpetual |             |
| <input checked="" type="checkbox"/> 3tdl | Other TDL | Perpetual |             |
| <input type="checkbox"/> 4tdl            | Other TDL | Perpetual |             |
| <input type="checkbox"/> StdI            | Other TDL | Perpetual |             |

- d. Update your license by going to **Gateway of Tally → F1: Help → Settings → License → Manage License → F5: Update**

**Note:** To know or change the site's default TDL configuration, go to **Gateway of Tally → F1: Help → Settings → License → Manage Account**. In the webpage go to **Account Management → License Management** and look at the Deployment section in the right side of the pane.)

### **I have upgraded to a new Tally Prime Release. What will happen?**

Normally, the add-on will work fine without any glitches. If you face problems with the Add-on, you can contact us for support.

### **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 to **Gateway of Tally → F1: Help → Settings → License → Manage Account**. In the webpage go to **Account Management → License Management** and look at the Deployment section. Select **Not Applicable** for TDL Configuration and the Add-On is removed for the license. Now **Update the license** from the product.

**How do I cross upgrade the Add-on from Silver to Gold Edition?**

Go to **F1: Help → Tally Shop**. A web page for Tally Shop shall open. Choose the add-on for which the edition needs to be changed. Update the license and restart Tally after download.

**My Subscription for the Add-on has expired. How do I renew my subscription?**

Go to **F1: Help → Tally Shop**. A web page for Tally Shop shall open. Choose the add-on for which the subscription is required to be renewed.

**Will this add-on work in remote session?**

Yes, this add-on will work remotely.