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Release Notes for TallyPrime and TallyPrime Edit Log Release 4.0 | What's New!

TallyPrime and TallyPrime Edit Log Release 4.0 bring great delight and joy to you with the following:

- The facility to share your business articles such as vouchers and reports through WhatsApp in a jiffy

- A simple way to import the masters and transactions maintained in the MS Excel format

- The state-of-art Dashboard that gives you a quick glimpse of your business health

Furthermore, the product improvements in the modules such as GST and Payment Request coupled with the facility to print previous and current balances in the Invoice and other enhancements make your experience with TallyPrime all the fruitful.

You can also read the Release Notes in Hindi (हिन्दी), Gujarati (ગુજરાતી), Bengali (বাংলা), Telugu (తెలుగు), Malayalam (മലയാളം), Kannada (ಕನ್ನಡ), and Tamil (தமிழ்).

Highlights – TallyPrime and TallyPrime Edit Log Release 4.0

TallyPrime Release 4.0 comes with new and exciting features that will make your experience even more delightful.

- TallyPrime with WhatsApp for Business

- Import Data from MS Excel

- Graphical Dashboard

Instant Sharing of Business Details | TallyPrime with WhatsApp for Business

Considering the importance of seamless and efficient communication between businesses and their stakeholders, TallyPrime Release 4.0 brings to you the power of instant communication via WhatsApp for Business. This helps you take advantage of the technology advancements and experience enhancements in communication that rule the market.

Businesses can send documents directly from TallyPrime to one or more parties or stakeholders in a single click. Consider that you just closed your books for the quarter. You can send digitally signed financial statements to your investors and key stakeholders on WhatsApp. Similarly, you can send invoices and reminder letters to your parties via WhatsApp and get responses from them via WhatsApp. This will help in managing the cash flow better as the communications are instant.

If your business is in India, your domestic parties also get the flexibility to click the payment URLs in invoices and reminder letters sent via WhatsApp to make instant payments.

WhatsApp is now seamlessly integrated with TallyPrime. You can sign up with WhatsApp for Business from TallyPrime, and send documents to one or many parties or stakeholders at one go. While TallyPrime retains the facility to send documents through e-mail, no more worries about when the receiver would see any mail and act on it.

Easy Migration from Any Software to TallyPrime | Import Data from MS Excel

Manual data entry for high volume data is a nightmare for any business. Manual entry is time-consuming and error-prone. To address this, TallyPrime Release 4.0 provides seamless import from MS Excel. This is in addition to the existing option to import XML files.

As you might have experienced, many software products allow export of data to Excel. This enables you to get data in Excel workbooks, and import to TallyPrime.

What's in store:

1. Effortlessly import masters and transactions from Excel.

2. Use any of the default templates/sample Excel files.

3. Take data curated in any Excel workbook and map it to fields in TallyPrime, regardless of the format or order.

4. Identify errors that occurred during import from the logs created while importing.

Visual Tool to Form Financial Insights | Graphical Dashboard

You can use Dashboards in TallyPrime for analysing business information using intuitive formats. Apart from the Sales and Purchase dashboards provided by default, you can create different dashboards. Based on your needs, you can include different reports as separate tiles, configure each tile as needed to cater to diverse requirements, and interact with each tile. Whether you're a business owner, finance manager, or consultant, Dashboard empowers you to make data-driven decisions that fuel growth and success. You can use the graphs/charts in different tiles to monitor

your cash flow, track revenue trends, analyse expense patterns, and gain a comprehensive view of your financial position and ledger balances for periods of your choice.

Dashboard in TallyPrime offers flexibility to:

1. Add tiles or hide tiles, configure each tile independently, include or exclude data points, and so on.

2. Restrict access to dashboards, based on user rights. If specific users have restricted access to certain tiles, such tiles will not form part of a dashboard for those users.

3. Create different dashboards for different purposes, organise tiles as per your preferences, and save the views.

4. Load a dashboard as the home screen when you open a Company.

5. Print, export, and share with stakeholders by e-mail or WhatsApp.

Product Improvements – TallyPrime and TallyPrime Edit Log Release 4.0

Printing Previous and Current Balances in Invoice

Invoice printing is all the 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.

Exporting GSTR-3B for a Quarter in a Single JSON File for QRMP Dealers

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.

Party GSTIN/UIN in Input Tax Credit Available Section of GSTR-3B

When you drill down from the **Input Tax Credit Available** section and view vouchers Party-wise, you will also get to see the party GSTIN/UIN.

Explore TallyEdge from Within TallyPrime

Exploring TallyEdge – your go-to account aggregator – is all the easier now, as you can head on to explore it through the Exchange menu in TallyPrime.

Explore TallyPrime Powered by AWS from TallyPrime

Exploring TallyPrime Powered by AWS is all the easier now, as you can know about it from the Help menu in TallyPrime.

Exporting TDS and TCS Returns As Per Latest FVU Tool 8.2

You can now export the following return reports according to the latest FVU Tool 8.2:

- TDS Form-24Q

- TDS Form-26Q

- Form-27Q

- TCS Form-27EQ

Count of Cancelled

The count of cancelled vouchers of all the months will be included in the GSTR-1 Document Summary, when you cancel one or more Sales Invoices.

GST Ledgers in RCM and Transactions with Unregistered Dealers (URD)

You can now add GST ledgers in the RCM purchase vouchers and purchases from the URDs, and rest assured these vouchers will be included in the returns.

Updation of GST Amount After Overriding GST Rate

Updation of GST Amount in vouchers is a surety, even if you override the GST Rate.

Even if the option **Use common ledger for item allocation configuration** is set to **No**, you will now be able to seamlessly override the GST Rate, and the GST Amount will get updated.

Printing of Company

The GSTIN/UIN will now get printed in Job Work Out Orders.

1. In the case of multiple GST Registrations, the GST Registration (chosen during voucher creation) and the State Code will get printed.

2. In the case of single GST Registration, you will be able to enter the GSTIN/UIN and State Code details using More Details, and print the same.

Total Value Field in

The experience of exporting an MS Excel or CSV of GSTR-1 HSN Summary is a lot better now.

The Total Value field will now be displayed with the total GST amount, even when you export GSTR-1 HSN Summary as an MS Excel or CSV file.

Taxable and Tax Amount Doubled for Certain Transactions in Nature View of GSTR-3B

Previously, when a transaction was included in two different sections, the Taxable and Tax Amount got doubled.

Viewing GSTR-3B in Nature View is a lot smoother now, as you will be able to view the correct Taxable and Tax Amount.

Vouchers Recorded for Import of Services in GSTR-3B

The vouchers recorded for Import of Services that are exempt from taxes will now get included only in the 4 A. Input Tax Credit Available section and will not be a part of the 3.1d. Inward Supplies (applicable for Reverse Charge) section.

Seamless Export of GSTR-1 When Data was Imported from Another Software

The export of GSTR-1 from TallyPrime is now seamless, even when the data was imported from another software.

Purchase Vouchers with the Same Bill of Entry No.

You can now record more than one purchase vouchers with the same Bill of Entry No., and the transactions will get included in returns.

Voucher Upload on GST Portal Wh

You can now upload vouchers with stock items where the Unit of Measurement is not applicable with the following facilities:

- The voucher created for goods will display the UoM as OTH.

- The voucher created for services will display the UoM as NA.

Seamless Creation of Vouchers with GST Data

Voucher creation with GST-related information is a lot smoother now, as you will not face any challenges or errors during voucher creation.

HSN/SAC, Description, and Party GSTIN in Excel File Exported Through ODBC

HSN/SAC, Description, and Party GSTIN were not part of the MS Excel file when exported through ODBC.

This issue is resolved.

Smooth Running of TallyPrime Irrespective of Length of HSN/SAC

TallyPrime will now continue to run smoothly when you open GSTR-1 and GSTR-3B, even when the length of HSN/SAC in transactions exceeds 1024 characters.

Seamless Migration to TallyPrime Release 4.0

If you are using TallyPrime Release 2.1 or earlier, you will now be able to seamlessly migrate your Company data to TallyPrime without memory-related errors, such as those occurring due to the following reasons:

- The size of the Company data or the number of vouchers is large.

- The vouchers contain stock items or services with slab-based rates, where the **Include Expense for slab calculation** configuration is enabled.

However, if you are working on TallyPrime Release 3.0 or 3.0.1, then you will not need to perform the process of migration. You can just load your Company data in TallyPrime Release 4.0 and continue your work.

Partial Payments to Payment Requests Through UPI

Your buyers will now be able to alter the Amount and make partial payments, when you send the Payment Request through UPI.

QR Codes for Payment Request for Transactions with Cash Ledger

The QR Code for Payment Request will now get generated even if the transaction is recorded with the Cash ledger.

Printing QR Code for Payment Request in Simple Invoice Format When GST is Disabled

You will now be able to print QR Code for Payment Request in the Simple Invoice format, even when GST is disabled under **F11** (Company Features).

Generating Payment Link Prior to Printing

When you create a voucher, TallyPrime will now prompt you to generate the payment link prior to printing.

This will happen when **Generate payment link/QR Code after saving voucher** and **Print voucher after saving** are enabled in the Voucher Type master.

Generating the payment link prior to printing ensures that the print has both – the payment link and QR Code – for Payment Request.

Seamless e-Invoice Generation

e-Invoice generation is a lot more seamless now, as you can now successfully generate an e-Invoice in the following scenarios:

- The invoice contains a government entity as a consignee.

- An intrastate transaction is not applicable for e-Way Bill.

Moreover, you will not face the **The ValDtls field is required** error when you generate an e-Invoice for the sale of goods or services.

QR Code in Sales Invoice for Multi-Invoice Printing

Multi-invoice printing with QR Code is flawless now.

When you print multiple Sales Invoices, all the invoices will now have the QR Code.

Printing e-Way Bill with e-Invoice

When you had enabled the printing e-Way Bill with e-Invoice (under **F12** in the Invoice configuration), the configuration applied only to one invoice.

The configuration will now be applied to all the invoices, even if you shut TallyPrime or load a different Company.

Selection of Order No. in Delivery Notes While Working on Client Computer

In the client computer of a multi-user environment, the time taken to select the Order No. of the party while creating a Delivery Note was more than expected.

With the enhanced performance, you will be able to select the Order No. in a jiffy.

Title of Sales Invoices After Downloading from Browser

When you download a Sales Invoice from a browser, the title of the invoice changes from Tax Invoice to Bill of Supply.

The title of the Sales Invoice will now be retained as Tax Invoice, when you download it from a browser.

Marginal Tax Relief for Employees with Taxable Income Between Rs. 7,00,000 and Rs. 7,27,777

Marginal Tax Relief is now applicable only to the employees who have opted for the New Tax Regime with taxable income between Rs. 7,00,000 and Rs. 7,27,777.

GCC VAT Details in Invoice with Ledger Created Under a Sub-Group

When you used a ledger created under a sub-group such as Fixed Assets, the GCC VAT details were not retained.

You will now have a smoother experience in creating invoice with the GCC VAT details, as irrespective of the ledger and its sub-group, the GCC VAT details will be retained.