



User Manual

Retrieve Customer details from Mobile Number in Sales Voucher

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Introduction:

The **Retrieve Customer Details from Mobile Number in Sales Voucher** add-on is an intelligent and time-saving feature developed for TallyPrime. It allows users to **automatically fetch and display customer details** such as **Name, Address** simply by entering the **mobile number** in the sales voucher.

This feature is especially **useful for retail businesses and service providers** that **frequently deal with walk-in or repeat customers**. Instead of searching for the customer ledger manually, the system **instantly retrieves the corresponding customer's details linked to that mobile number**, ensuring faster billing and improved accuracy. Let's see how this Add-On will Work in Tally Prime

Features:

- Perfect for counters, shops, or businesses with frequent walk-in customers.
- Instantly retrieves customer **name, address** based on the entered mobile number.
- Helps identify existing customers by mobile number, avoiding duplicate ledger creation.
- Speeds up invoice creation by avoiding manual ledger searches.

Important Alert!

Take Back up of your company Data before activating the Add-on.

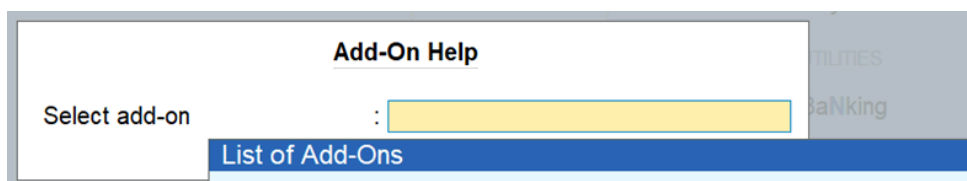
Support Related Terms & Conditions

1. **One-Time Free Support:** Free support is provided **only once**, either during the trial period or after purchase add-on.
2. **Additional Support:** Any further support will be chargeable based on the duration of the support required.
3. Remote support will be provided during working hours on business days.
4. Support will be provided only after the Add-on is configured in TallyPrime. For configuration issues, please contact Tally Care.
5. For support, the customer must send an email with the purchase invoice copy and a brief description of the issue.

Once you try/purchase this add-on, follow this step below to configure the add-on and use it.

Setup Guide:

1. Update your license by going **Gateway of tally → F1: help → Setting → License → Manage License → F5: Update**
(In Case you are using Multi-site Account, you will need to configure Tally Prime to Activate the Add-on for a particular site.)
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



Activate the Add-on for Tally Prime

Go to **Gateway of Tally → F1: Help → TDL & Add-on**

Click on F4: Manage Local TDLs

Load Selected TDL files on Start Up – Yes

Selected the TDL from the list and make it yes

Click On F6: Add-on Features

Set “Yes” to the option **“Enable Retrieve Customer details from Mobile No”**

Add-On Features

Enable Retrieve Customer Details from Mobile No ? **Yes**

After Enabling in the Company Level option, you can able to see an additional feature in **Sales Voucher Type** as show in the below figure Navigate.

Gateway of Tally → Create/Alter → Voucher Type → sales

Voucher Type Alteration (In Developer Mode) KGN Customer Name From Mobile No

Name : Sales
(alias) :

General		Printing		Name of Class	
Select type of voucher	: Sales	Enable KGN Retrieve Customer Details from Mobile No	? Yes		
Abbreviation	: Sale	Print voucher after saving	: No		
Activate this Voucher Type	: Yes				
Method of Voucher Numbering	: Automatic	Use for POS invoicing	: No		
Numbering behaviour on insertion/deletion	: Retain Original Voucher No.	Default template to print	: ♦ Not Applicable		
Set/Alter additional numbering details	: No	Default title to print			
Show unused vch nos. in transactions for		Default bank	: ♦ Not Applicable		
Retain Original Voucher No. behaviour	: Yes	Default jurisdiction			

Set as YES to this Option

F2: Period
F3: Company
F4
F5
F6
F7
F8
F9
F10: Other Masters
More Details

After setting as YES Save the Sales Voucher Type form

Now let's see How this will work in Sales Voucher

Gateway of Tally → Vouchers → F8: Sales

Accounting Voucher Creation (In Developer Mode) KGN Customer Name From Mobile No

Sales No. 3 Date 1-Apr-25 Tuesday

Reference No. : Party A/c name : Price Level :
Current balance :

Customer Details :

Customer Mobile No : Customer Name : Address :

Sales ledger :
Current balance :
Name of Item

Quantity Rate Rate per Amount
(Incl. of Tax)

Follow the Same Steps to record the Sales bill

F2: Date
F3: Company
F4: Contra
F5: Payment
F6: Receipt
F7: Journal
F8: Sales
F9: Purchase
F10: Other Vouchers
E: Autofill
H: Change Mode
I: More Details

Accounting Voucher Creation (In Developer Mode) KGN Customer Name From Mobile No

Sales No. 3 Date 1-Apr-25 Tuesday

Reference No. : Party A/c name : KGN Counter Sales
Current balance : 8,740.00 Dr

Customer Details :

Customer Mobile No : 7896325410 Customer Name : KGN Customer Address : Kamalapuram

Sales ledger : Sales
Current balance : 8,740.00 Cr
Name of Item

Quantity Rate Rate per Amount
(Incl. of Tax)

Item 1 10 Nos 900.00 900.00 Nos 9,000.00

♦ End of List

Here enters the Customer Mobile Number, Name and Address

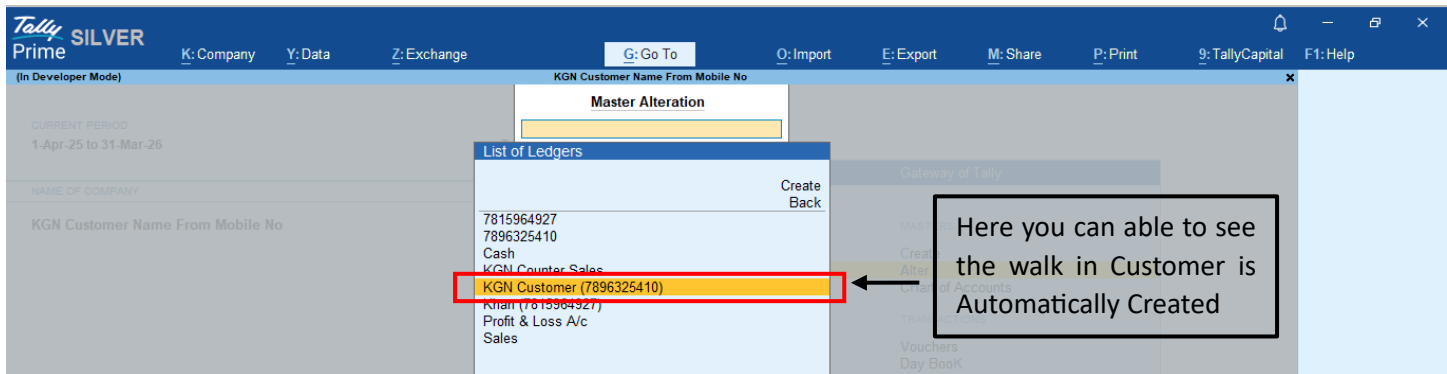
NOTE: When the Customer Mobile Number is New then the Tally Automatically Creates the Customer Ledger as Shown in the Below fig. **Save the Sales Voucher**

Narration: 10 Nos 9,000.00

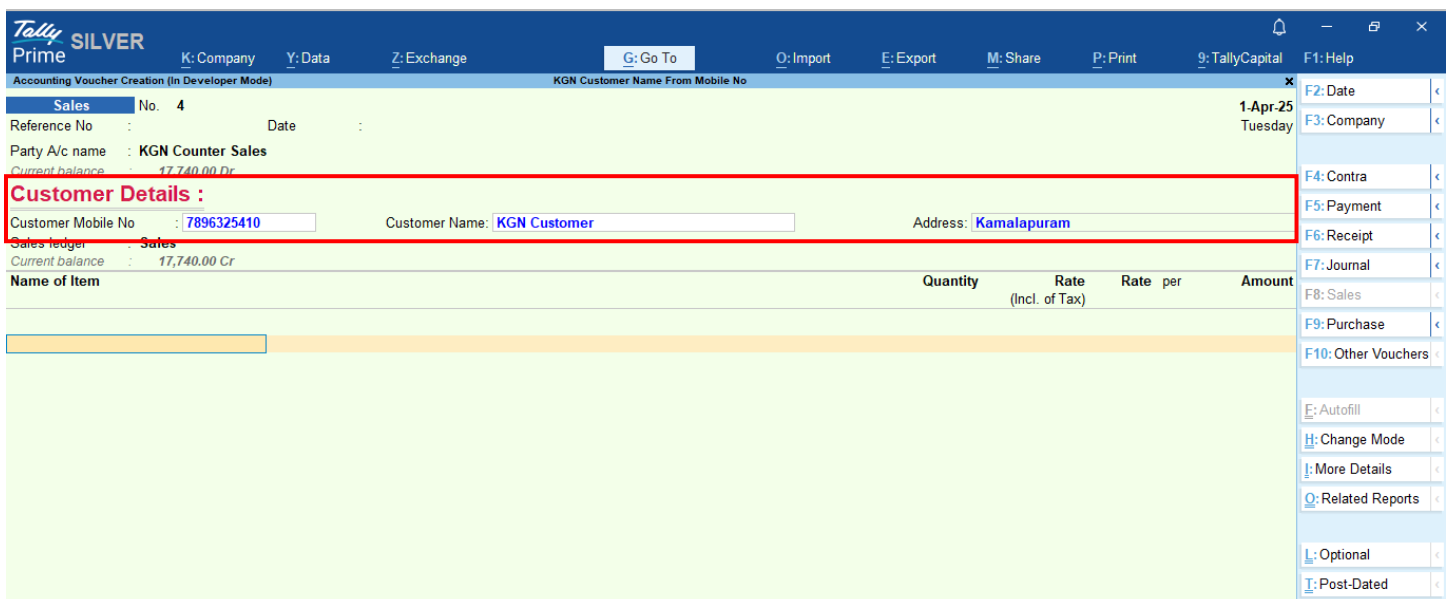
Q: Quit A: Accept D: Delete X: Cancel Vch F12: Configure

F2: Date
F3: Company
F4: Contra
F5: Payment
F6: Receipt
F7: Journal
F8: Sales
F9: Purchase
F10: Other Vouchers
E: Autofill
H: Change Mode
I: More Details
O: Related Reports
L: Optional
T: Post-Dated
F12: Configure

Gateway of Tally → Alter → Ledger



And when you try to bill Already Existing customer, you just need to enter his Mobile Number and the Customer Name and Address was automatically filled by the system as shown in the below fig.



Like this the With the Help of this Add-On **useful for retail businesses and service providers that frequently deal with walk-in or repeat customers.** Instead of searching for the customer ledger manually, the system **instantly retrieves the corresponding customer's details linked to that mobile number**, ensuring faster billing and improved accuracy.

For Any Additional Customization Please Contact Our Senior Developer :

+91 9063604900/+91 7989604900

===== End of Add on =====

Find our **Other Solution** which is available at **Tally Shop** – (it may useful to your organization)

Open your **Tally Prime** > Click the **F1-Help** > then Click **Tally Shop** > then Type – (In Search Key word) > **KGN**

TallyShop

Categories

<> Top Developers

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- ☐ Banking
- ☐ Audit
- ☐ Manufacturing
- ☐ Voucher Numbering
- ☐ Fixed Assets
- ☐ Business Verticals
- ☐ Security
- ☐ Reports
- ☐ Invoicing & Voucher

KGN



TallyPrime

India

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Silver Gold

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KGN Resize of E Invoice QR Code in sales Bill 2.1

KGN Resize of E-Invoice QR Code in Sales Bill allows you to adjust the size of the e-invoice QR code printed on your sales invoices.

More Info

Add to Cart

KGN Customized Sales Invoice 6.1

The KGN Customized Sales Invoice add-on transforms the standard Tally Prime invoice into a highly professional, brand-focused, and customer-friendly document.

More Info

Add to Cart

KGN Dynamic AlterNet Quantity Calculation Module 1.0

The Dynamic AlterNet Quantity Calculation Module automatically recalculates alternate quantities based on real-time data and configurable rules.

More Info

Add to Cart

KGN Rate After Discount in Sales Entry and Printing 6.1

KGN Rate After Discount add-on enhances your sales voucher experience in Tally Prime by automatically showing the effective rate after applying discounts.

More Info

Add to Cart

Check your Requirement and try the Demo.

All the above our Listed Add-on as **Video Tutorial** also available in our **YouTube Channel**

KGN SOFT SOLUTIONS

Click on: www.youtube.com/@kgnsoftsolutions

Ready Add-on & Modules

AlterNet Qty Change in Voucher
Auto B2C Item wise Sales posting
Auto Backup
Auto Manufacturing after Sales
Auto Posting of Bulk Vouchers
Auto Posting of Payment Vouchers
Auto Receipt From Ledger (No Bill Wise)
Auto Receipt From Ledger Report
Auto Receipts From OS Report
Batch Details in Ledger Report
Batch Number Column in Columnar Sales Register
Bill Received Details in Sales Register
Central Bank of India RTGS NEFT Form
CEO Dash Board
CREDIT CONTROL ON DAYS
DAY BOOK TOTALS
Day wise Bill Wise Collection
Doctors OP Receipts Bulk Posting
DOUBLE DISCOUNT IN SALES
Expiry Stock Report

False Date Controlling
Fixed Assets Register
Grid Lines in Sales Invoice
Group Company Reports
Groupwise Outstanding Report
GST RATES WISE INPUT OUTPUT
INNER WEAR SIZE and PCS
Item wise Profit or Loss report
Letter Head in invoice
Letterhead Format Invoice
Loading Slip with CASE-PCS
Multi Voucher Printing with Voucher no Range
Party Previous Balance
Pickup List
POS Print from Normal Sales
Qty in Profit and Loss Account
Recycle Bin
Sales to Receipt Auto Posting (Only Cash)
Scanned Signature in Invoice
Size wise billing
Grade wise Rate Setup and Quotation
Stock Item Std Rate Report
STOCK SUMMARY WITH GST INFO
System Date wise daybook
TEXTILES PCS METERS
User's Activity Tracking Report
Voucher Alteration History
Voucher Date as System Date
Voucher Number as Voucher Reference
Auto E-Mailing Module
Bill to Ship to Instead of Buyer Consignee

Daybook Totals with Cash & Bank Closing balance
GSTR-4 Generation from Tally
Inactive Stock Items
Ledger Replace
Original Invoice Date Filter
Space BW Line
TCS Setup Simplified and Sales Control
Cash Sales Register
Date wise Item wise Negative Stock
Item Details in Multi Companies
Ledger Master Report
Minimum Order Report
Std Rate Auto pick in Incl Rate
Auto Backup TSS Validity
Brokerage Module
Common Godown for All Items
Customized Ledger Interest Report
Disable Delete cancel to users
Free Qty in Sales & purchase
GST as per Books in 3B
Item Name Column in Columnar report
Ledger Blocking in Sales
Negative Stock Control
Price List Rate in Inclusive Rate
Recycle Bin Without Confirmation
Resize Of eInvoice QR Code
Salesman report
Skip Rate per Disc Amount to users
Tally2WhatsApp Module
Cmp 2 Cmp Auto Posting
Discount Amount Column in Invoice
Godown Security