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VidhiOn on WhatsApp: Owner's Guide

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How it works

From your own WhatsApp, send a message to your business number, and VidhiOn replies with what you asked for from Tally.

- **Start with Hi.** It brings your menu.
- **Just type the words.** Capital letters don't matter, and part of a customer's name is enough.
- **Choose from a list by typing.** When several customers match, reply **Option 2** for the second one.
- **Nothing goes to a customer unless your message starts with Send.** *Ledger Sharma* comes only to you. *Send Ledger Sharma* goes to the customer as well.
- **More than one company?** *Hi* lists your companies. Choose one with **Option 1**, and everything after that is for that company until you choose another.

VidhiOn can only answer while the shop's computer, the program and Tally are on.

> **You:** Hi
>
> **VidhiOn:** Welcome Suresh to VidhiOn Owner Dashboard! Reply with any of the following: *Stock*, *Low Stock*, *DayBook*, *Show Outstanding*, *Show Due*, *Ledger Sharma* ...

The names and amounts in this guide are examples.

Everything you can ask for

Only the commands marked **Yes** send anything to a customer. Your shop may have switched some of these off in Settings.

You type	You get	Reaches a customer?
Hi	Your menu	No
Outstanding Sharma	One customer's outstanding and due	No
Ledger Sharma	A customer's or supplier's ledger for this financial year, as a PDF	No
Detailed Outstanding Sharma	Every invoice with the payments set against it, as a PDF	No
INV PING/26-27/1486	The PDF of that invoice	No
Show Outstanding	A PDF of what customers owe. Add an amount for only those above it, such as Show Outstanding 5000	No
Show Due	A PDF of what is overdue. Show Due 5000 works the same way	No
Stock	Your stock list	No
Low Stock	Items below their set level	No
DayBook	That day's vouchers as a PDF, with a GST summary	No
Price Basmati	The price of matching items	No
Reports	Owner Reports, such as Report Sales or Report GST	No
App	A code to open VidhiOn on your phone, if your licence includes phones	No

You type	You get	Reaches a customer?
Send Ledger Sharma	The ledger to the customer, and a copy to you	**Yes**
Send Detailed Outstanding Sharma	That PDF to the customer, and a copy to you	**Yes**
Send INV 1486	An earlier invoice to its customer, and a copy to you	**Yes**
Send Receipt 45	An earlier receipt to its customer, and a copy to you	**Yes**
Send Invoices	All the invoices and receipts being held, if your shop holds them	**Yes, many**
Send Outstanding	The outstanding reminder to approved customers	**Yes, many**
Send Due	The due reminder to approved customers	**Yes, many**

A customer's outstanding and ledger

Ask with part of the customer's name or their mobile number. The answer comes only to you, unless you start with Send.

See what a customer owes

> **You:** Outstanding Sharma
>
> **VidhiOn:** Outstanding of *Sharma Traders*, for you only - nothing was sent to the customer.
>
> Balance: ₹48,378.82
>
> Due for Payment: ₹12,500.00

See a ledger when several customers match

> **You:** Ledger Sharma
>
> **VidhiOn:** *2 customers* match *Sharma*.
>
> *1.* Sharma Traders
>
> *2.* Sharma & Sons
>
> Reply *Option* and the number (e.g. *Option 1*): the ledger comes to you.
>
> **You:** Option 1
>
> **VidhiOn:** *[PDF]* Ledger of *Sharma Traders*. Nothing was sent to the customer - to send it, type *Send Ledger Sharma Traders*.

Send the ledger to the customer

> **You:** Send Ledger Sharma Traders
>
> **VidhiOn:** *[PDF]* Ledger of *Sharma Traders* sent to +91 98XXXXX211. Your copy is attached.

It goes to every number on that ledger in Tally. If the customer has no number or is blocked, nothing goes to them, and you get your copy and the reason.

See or send every invoice with its payments

> **You:** Detailed Outstanding 9876543210
>
> **VidhiOn:** *[PDF]* every invoice of that customer, with the payments set against it.

Type *Send Detailed Outstanding* and the name to send it to the customer as well.

Invoices and receipts

The same rule applies: *INV* brings the invoice to you, and *Send INV* sends it to the customer.

See an invoice

> **You:** INV PING/26-27/1486
>
> **VidhiOn:** *[PDF]* the invoice.

Send an old invoice to the customer

> **You:** Send INV 1486
>
> **VidhiOn:** *[PDF]* Invoice PING/26-27/1486 (12-10-2026) of *Sharma Traders* sent to +91 98XXXXX211. Your copy is attached.

When two invoices have the same number

Numbers can repeat from year to year, so VidhiOn asks which one you mean. *Send Receipt 45* works the same way.

> **You:** Send INV 1486
>
> **VidhiOn:** *2 invoices* are numbered *1486*.
>
> *1.* PING/26-27/1486 - 12-10-2026 - Sharma Traders
>
> *2.* PING/25-26/1486 - 03-02-2026 - Gupta Stores
>
> Reply *Option* and the number (e.g. *Option 1*): it goes to that customer and a copy to you.
>
> **You:** Option 1

If your shop holds invoices for your approval

These commands work only when Settings holds invoices back before sending.

You type	What happens
Held Invoices	Lists the invoices and receipts waiting, numbered
View 2	Brings number 2 to you as a PDF
Send 1 3	Sends numbers 1 and 3 to their customers. The rest keep waiting
Remove 2	Takes number 2 off the list without sending it
Send Invoices	Sends everything waiting

Your business at a glance

These answers come only to you, so you can ask as often as you like.

The Day Book for any day

> **You:** DayBook yesterday
>
> **VidhiOn:** *[PDF]* every voucher of that day, with the GST summary at the end.

You can also type *DayBook today* or *DayBook 24-09-2026*. *DayBook* alone asks which day. If a day has no entries, the reply says so and names nearby days that do.

Who owes you more than an amount

> **You:** Show Outstanding 5000
>
> **VidhiOn:** Here is your Outstanding Report: *[PDF]*

Show Due 5000 does the same for overdue amounts.

Stock and prices

> **You:** Low Stock
>
> **VidhiOn:** the items below their set level.
>
> **You:** Price Basmati
>
> **VidhiOn:** the price of every matching item.

Owner Reports

Reports lists them all, or go straight to one:

You type	You get
Report Today	Today's digest
Report Orders	Sales orders
Report Sales	Sales and customers
Report Outstanding	Receivables
Report Collection	How fast customers pay
Report Purchases	Purchases and suppliers
Report Stock	Stock and items
Report GST	GST
Report Pack	Every group in one PDF

Reminders to your customers

Be careful with Send Outstanding and Send Due: once set up, they go to customers straight away, and WhatsApp doesn't ask you again. These two commands can reach many customers at once.

> **You:** Send Outstanding 5000
>
> **VidhiOn:** *Outstanding reminders sent*
>
> 38 message(s) to 36 customer(s) with an outstanding of ₹5,000 or more: Sharma Traders, Gupta Stores, Patel Agencies, Mehta & Sons, Kiran Enterprises and 31 more.
>
> Who gets it is chosen on the computer: Payment Reminders > Check who gets it.

Send Due works the same way for overdue amounts.

- **The first time:** if no reminder is set up on the computer yet, you get a link to a page where you tick the customers. Nothing goes until you send it from that page.
- **The amount:** only customers who owe that amount or more get it. Without an amount, the minimum saved for the reminder applies.
- **Who is left out:** customers unticked on the computer, blocked customers, and customers with no mobile number in Tally. The reply names those unticked and those with no mobile number.
- **Exact words only:** a close spelling won't send anything by mistake.

Before you send

- Check the list first with *Show Outstanding 5000* or *Show Due 5000*. It goes only to you.
- Start with a high amount, so that only a few customers get it.
- Sending too many messages from one number in a short time can get it restricted or blocked by WhatsApp. A message that has gone can't be taken back.

When something doesn't work

Most problems are the computer, Tally or the customer's number in Tally.

What happens	What to do
No reply at all	Ask someone at the shop to check that the computer and VidhiOn are on, and that WhatsApp shows connected
The reply says Tally is not connected	Ask them to open Tally with your companies

What happens	What to do
No customer or supplier ledger matches	Type part of the name as it is in Tally, or the 10-digit mobile
has no mobile number on the ledger	Add the number on that ledger in Tally. Your copy is still attached
is blocked on the Block Customers page	The customer gets nothing while blocked. Unblock them on the computer if you want to send
There are no entries in Tally on a date	Choose one of the nearby days the reply names
Figures are from the wrong company	Send *Hi* and choose the company again
A command you expect is missing	It may be switched off in Settings on the computer
Anything else	Call your VidhiOn dealer