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VidhiOn on WhatsApp: Salesman Guide

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How it works

From your own WhatsApp, you ask the shop's business number about the customers assigned to you, and the answers come back to you.

- **Your number must be registered.** The shop adds your mobile number as a Salesman and assigns your customers on the computer.
- **Work for one customer at a time.** Send **Hi**, choose a customer with **Option 2**, and everything you ask is for that customer.
- **The connection lasts 30 minutes from your last command.** After that, choose the customer again. Send *Hi* at any time to switch.
- **The answers come to you, not the customer.** Only a message starting with **Send** goes to the customer.
- **Only your customers.** You can't see a customer who isn't assigned to you.

> **You:** Hi
>
> **VidhiOn:** Hi *Ramesh*, welcome to Gupta Wholesale! I am your Sales Support Assistant.
>
> 1. Sharma Traders
> 2. Patel Agencies
> 3. Mehta & Sons
>
> To choose, reply with *Option* followed by the Sr. No. (e.g., Option 1, Option 2).
>
> **You:** Option 2
>
> **VidhiOn:** Dear, Ramesh. *Connected to Patel Agencies - Sales Support*. You can ask me for: *Ledger*, *INV*, *Receipt*, *Outstanding*, *Price*, *Items*, *Bank Details*, *Location*, *Stock*, *Order*, *Edit Order*, *Convert*, *Offers*. Just type what you need.

The names and amounts in this guide are examples.

Everything you can ask for

The shop decides what Salesmen can use, so your menu may be shorter than this.

After you connect to a customer

You type	You get	Reaches the customer?
Ledger	Their ledger for this financial year	No
Ledger 0	Their ledger for this quarter	No
Outstanding	What they owe, and how much is due	No
INV 1202	The PDF of that invoice	No
Receipt	Their latest payment receipts	No
Price	Today's price list	No
Price Basmati	That customer's price, with the Default beside it	No
Items	The list of items	No
Stock	Stock of items	No
Bank Details	The shop's bank account	No
Location	The shop's address and map	No

You type	You get	Reaches the customer?
Offers	The latest offers	No
Order	An order link for this customer	No
Edit Order	A way to change their recent order	No
Convert	Their sales orders that can become invoices	No

Without connecting, using part of the name or the mobile

You type	You get	Reaches the customer?
Outstanding Patel	That customer's outstanding and due	No
Ledger Patel	Their ledger as a PDF	No
Detailed Outstanding Patel	Every invoice with the payments set against it, as a PDF	No
Price Basmati	The price for everyone	No
App	A code to open VidhiOn on your phone, if the shop's licence includes it	No
Send Ledger Patel	The ledger to the customer, and a copy to you	**Yes**
Send Detailed Outstanding Patel	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**

Working for a customer

Connect once, then just type what you need until you switch customer.

Check what they owe before a visit

> **You:** Option 2
>
> **VidhiOn:** *Connected to Patel Agencies - Sales Support* ...
>
> **You:** Outstanding
>
> **VidhiOn:** Outstanding Details for *Patel Agencies* on *31-10-2026 11:30*
>
> Balance: ₹48,378.82
>
> Due for Payment: ₹12,500.00

Get their ledger

> **You:** Ledger
>
> **VidhiOn:** *[PDF]* their ledger for this financial year.

Get an invoice

> **You:** INV 1202
>
> **VidhiOn:** *[PDF]* invoice 1202.

These come to you alone, so you can look at them in front of the customer or before you call.

Asking by name, and sending to the customer

You don't have to connect first. Type part of the name or the mobile, and start with **Send** only when the customer should get it too.

See a ledger

> **You:** Ledger Patel
>
> **VidhiOn:** *[PDF]* Ledger of *Patel Agencies*. Nothing was sent to the customer - to send it, type *Send Ledger Patel Agencies*.

Send it to the customer

> **You:** Send Ledger Patel Agencies
>
> **VidhiOn:** *[PDF]* Ledger of *Patel Agencies* 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.

Send an old invoice

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

When several customers match

> **You:** Ledger Mehta
>
> **VidhiOn:** *2 customers* match *Mehta*.
>
> *1.* Mehta & Sons
>
> *2.* Mehta Stores
>
> Reply *Option* and the number (e.g. *Option 1*): the ledger comes to you.

A customer who isn't yours

> **You:** Ledger Sharma
>
> **VidhiOn:** No customer of yours matches *Sharma*. Nothing was sent - you can ask for the ledgers of the customers assigned to you.

Prices, stock and orders

A price depends on whether you are connected, so connect first when you are quoting a customer.

Check a price

> **You:** Price Basmati
>
> **VidhiOn:** the matching items' prices.

Connected to a customer, you get that customer's price, with the Default beside it where they have their own. Not connected, you get the price for everyone. *Price* alone brings the whole price list as a PDF.

Check stock

> **You:** Stock Basmati
>
> **VidhiOn:** *STOCK - Basmati*, with the matching items.

The shop decides how much stock detail Salesmen see.

Take an order

> **You:** Order
>
> **VidhiOn:** Place your order - Gupta Wholesale. Hi *Patel Agencies*, tap the link below to open our online order page, choose your items and submit your order. *[link]*

The link is for the connected customer and works for a limited time. To change a recent order, type *Edit Order*.

Turn a sales order into an invoice

> **You:** Convert
>
> **VidhiOn:** the sales orders of this customer that can be invoiced.
>
> **You:** Convert ORD-1042
>
> **VidhiOn:** Creating the invoice for this Sales Order, please wait...

This makes a real invoice in Tally, so check the order number before you send it.

When something doesn't work

The owner or whoever runs VidhiOn at the shop can fix most of these on the computer.

What happens	What to do
Access Denied	Your number isn't registered. Ask the shop to add you on Manage Users and keep you Active
No customers assigned!	Ask the shop to assign your customers
Your 30 minutes with a customer *are over*	Choose the customer again from the list
is not in your customer list	Send *Hi*, then use a number from the new list
No customer of yours matches	The customer isn't assigned to you, or the name is different in Tally. Try their mobile, or ask the shop

What happens	What to do
has no mobile number on the ledger	Nothing went to the customer. Ask the shop to add the number in Tally
is blocked on the Block Customers page	Nothing went to the customer. Ask the owner
An option you need is missing	Ask the shop to switch it on for Salesmen on Menu Access
The reply says Tally is not connected, or there is no reply	Ask someone at the shop to check the computer, VidhiOn and Tally are on