

# WhatsApp Facility in Miracle



❖ **Points that will be covered in this document:**

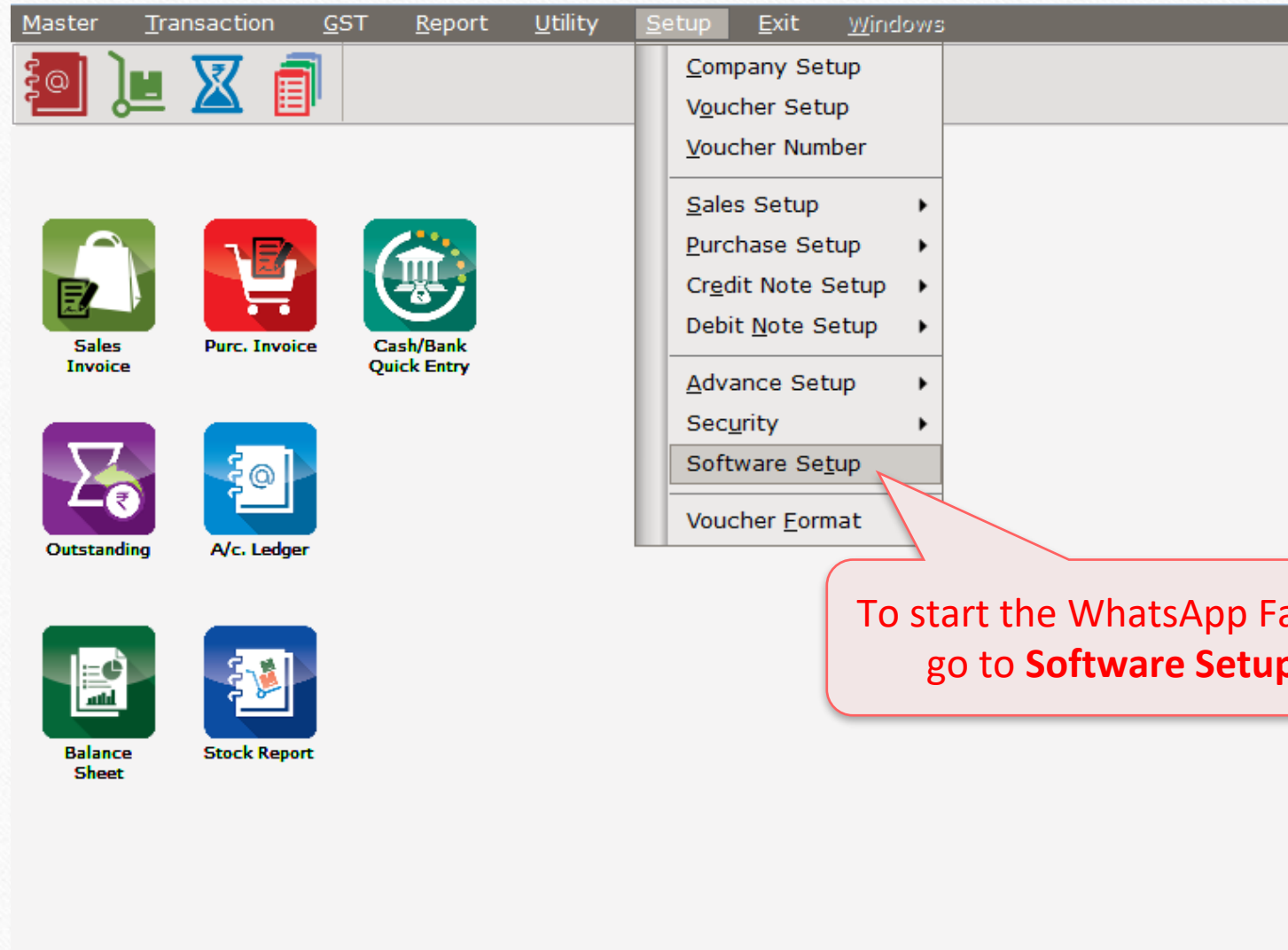
- **Explanation of WhatsApp Facility**
- **WhatsApp Facility Setup**
- **General Usage of WhatsApp**
- **Sending Sales Invoice via WhatsApp**
- **WhatsApp Sales Voucher Setup**
- **Sending A/C Ledger via WhatsApp**
- **Sending Outstanding reports via WhatsApp**
- **WhatsApp Userwise Security**
- **WhatsApp Reports**

# Explanation of WhatsApp Facility

- ❖ WhatsApp facility makes easier for users to send messages, invoices, reports, vouchers, party wise reports, ledger, outstanding reports to customers.
- ❖ The WhatsApp Facility allows to send different files formats like, PDF, Excel, Word, JPG, PNG etc, to users.
- ❖ The shortcut key to open a WhatsApp is Ctrl + K.



# WhatsApp Facility Setup



Setup -> Software Setup -> Software Setup			
Category	Description	Value	
Software Setup	<b>Backup Options</b>		
	Auto Backup	Ask	
	Daily/Monthly Backup	Daily	
	Secure Backup against Ransomware	Yes	
	<b>Language Options</b>		
	Multi Language Support Required	No	
	Activation Key	Caps Lock	
	Gujarati KeyBoard Layout	Phonetic	
	Hindi KeyBoard Layout	Phonetic	
	<b>Other Options</b>		
		None	
	Password Required?	No	
	User Name	DS-SANJAY	
		Windows Default	
	Company List	Default	
	Default Search Type in Popup/Report	List	
	WhatsApp Facility Required ?	No	
	<b>Android/IOS Synchronization Option</b>		
	Android/IOS Synchronization Required	Yes	
	Android/IOS Setup	File	

Press "Enter" key to enable the facility.

Setup -> Software Setup -> Software Setup

Category	Description	Value
Software Setup	<b>Backup Options</b>	
	Auto Backup	Ask

**Terms & Conditions**

WhatsApp Facility Terms in Miracle Accounting Software

**Terms & Conditions:**

Please read the below terms of service carefully before activating this feature.

- Active Subscription is mandatory to use this feature.
- WhatsApp monitors closely the type of message you send. Sending unsolicited messages (SPAM) that your recipients are not expecting or want to receive, can result in WhatsApp permanently banning your number or IP. This is an action that WhatsApp takes, and Miracle Accounting Software has no control or responsibility over it.
- Some cases where we are certain that your number will be banned are:
  - Sending messages to people that haven't agreed to receive messages from you or that have no connection to you or your business.
  - Sending messages to numbers that don't exist or that don't have WhatsApp installed.

Messages for debt recovery (people will report it as SPAM).

After waiting for 15 seconds, "I agree" button will be active, click "I Agree" button.

T&C window will appear.



Setup -> Software Setup -> Software Setup

Category	Description	Value
Software Setup	<b>Backup Options</b>	
	Auto Backup	Ask
	Daily/Monthly Backup	Daily
	Secure Backup against Ransomware	Yes
	<b>Language Options</b>	
	Multi Language Support Required	No
	Activation Key	Caps Lock
	Gujarati KeyBoard Layout	Phonetic
	Hindi KeyBoard Layout	Phonetic
	<b>Other Options</b>	
	Security Type	
	Before Company P	
	LAN Server Comput	
	Temporary Path	
	Company List	Default
	Default Search	List
	Popup/Report	Yes
	<b>Option</b>	
	Required	Yes
		File

Warning

Do You Want To Apply Changes To Setup?

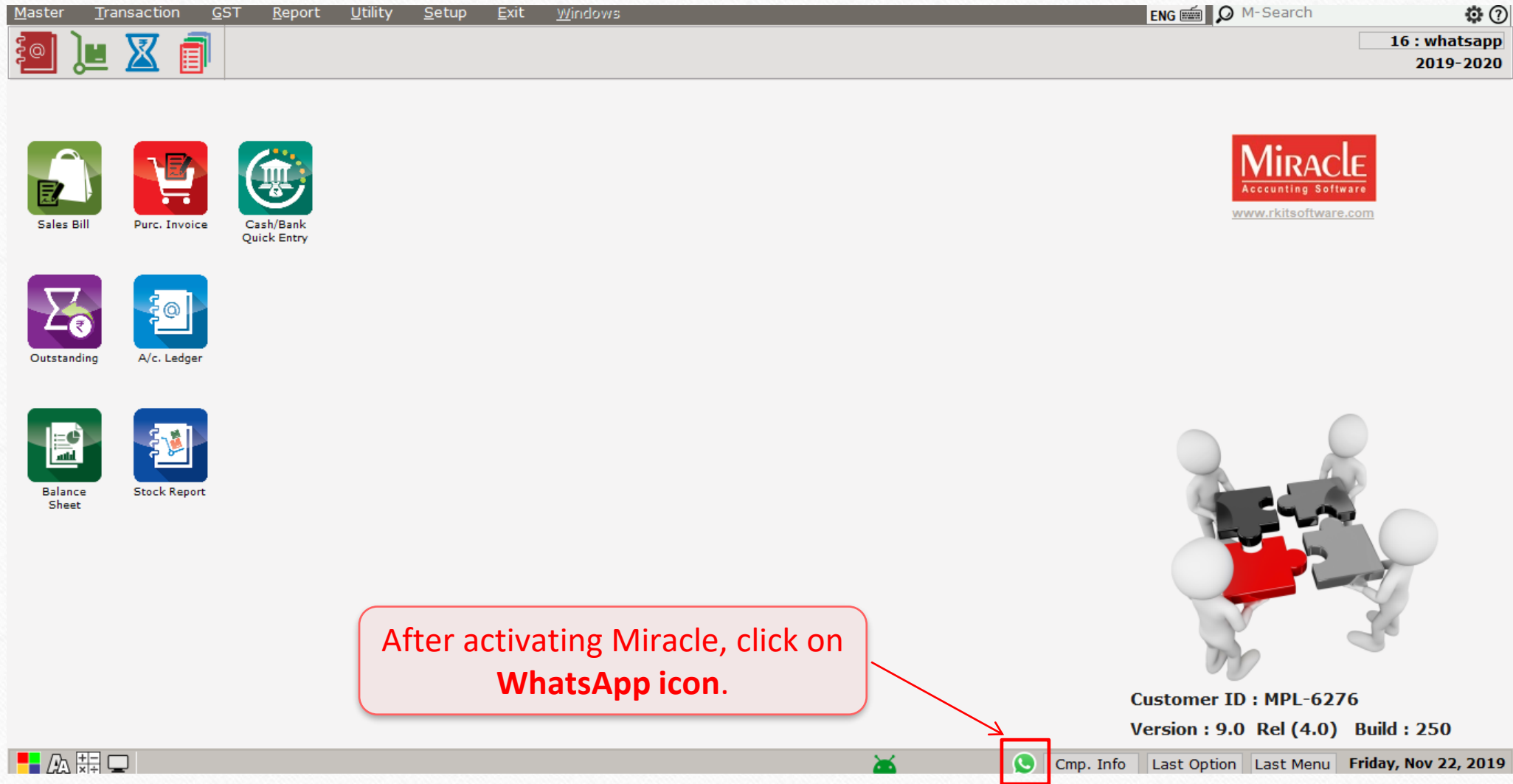
Click "Yes" to save the changes.

Setup -> Software Setup -> Software Setup			
Category	Description	Value	
Software Setup	<b>Backup Options</b>		
	Auto Backup	Ask	
	Daily/Monthly Backup	Daily	
	Secure Backup against Ransomware	Yes	
	<b>Language Options</b>		
	Multi Language Support Required	No	
	Activation Key	Caps Lock	
	Gujarati KeyBoard Layout	Phonetic	
	Hindi KeyBoard Layout	Phonetic	
	<b>Other Options</b>		
	Security Type	None	
	Before Company Password Required?	No	
	LAN Server Computer Name	DS-SANJ	
	Temporary Path	Windows	
	Company List	Default	
	Default Search Type in Popup/Report	List	
	WhatsApp Facility Required ?	Yes	
	<b>Android/iOS Synchronization Option</b>		
	Android/iOS Synchronization Required	Yes	
	Android/iOS Setup	File	


The WhatsApp facility is now activated.

**Note:** Make sure to restart Miracle after successful activation of WhatsApp.

# General Usage of WhatsApp









16 : whatsapp  
2019-2020

This **window** will appear.



www.rkitsoftware.com



**Send WhatsApp**

Mobile No.  Address Book


WhatsApp Body

Attachment

Add
Remove
Send

Customer ID : MPL-6275

Version : 9.0 Rel (4.0) Build : 225


Cmp. Info
Last Option
Last Menu
Tuesday, Oct 1, 2019

The screenshot shows a 'Send WhatsApp' dialog box with the following fields and buttons:

- Mobile No.:** A text field containing '8578785231, 8235775357'. A red arrow points to this field from a callout box.
- Address Book:** A button next to the Mobile No. field.
- WhatsApp Body:** A text area containing 'Hello, I have attached an invoice copy, kindly down...'. A red arrow points to this area from a callout box.
- Attachment:** A text field containing 'C:\USERS\CHIRAG.K\DESKTOP\SPEECH\INVOICE.PDF'.
- Buttons:** 'Add', 'Remove', and 'Send' buttons are located at the bottom.

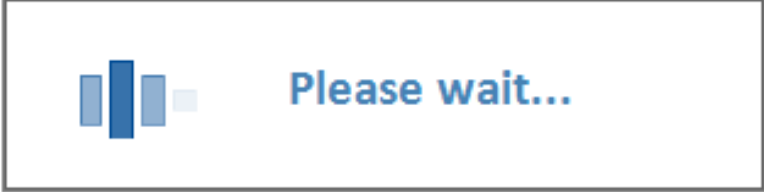
Four red callout boxes provide instructions:

- Multiple numbers can be added to send the message.
- You can save the contact in **Address Book**.
- Click **"Send"** to deliver the message.
- Click **"Add"** to attach files.

**Send WhatsApp** [X]

Mobile No.

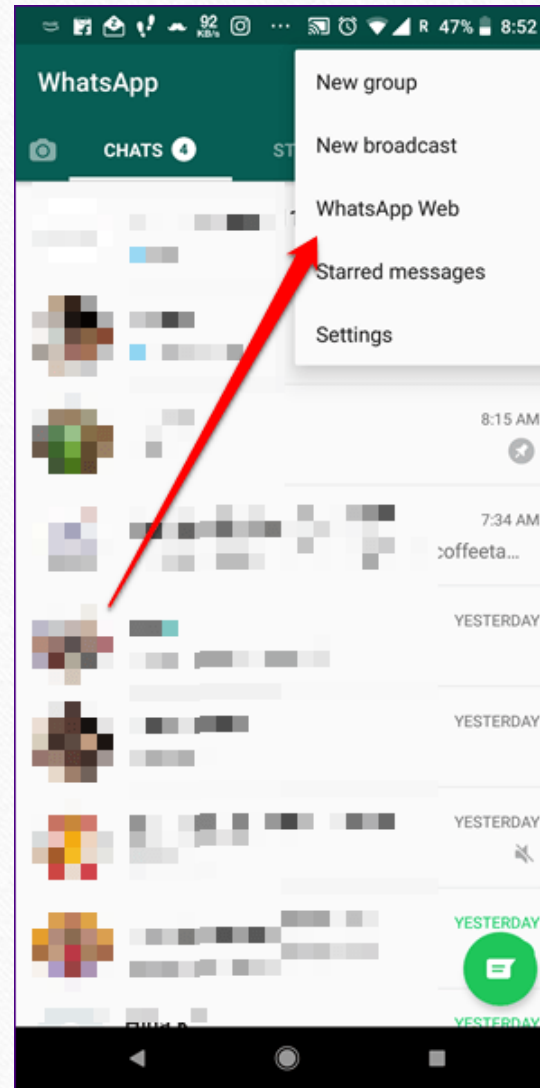
WhatsApp Body



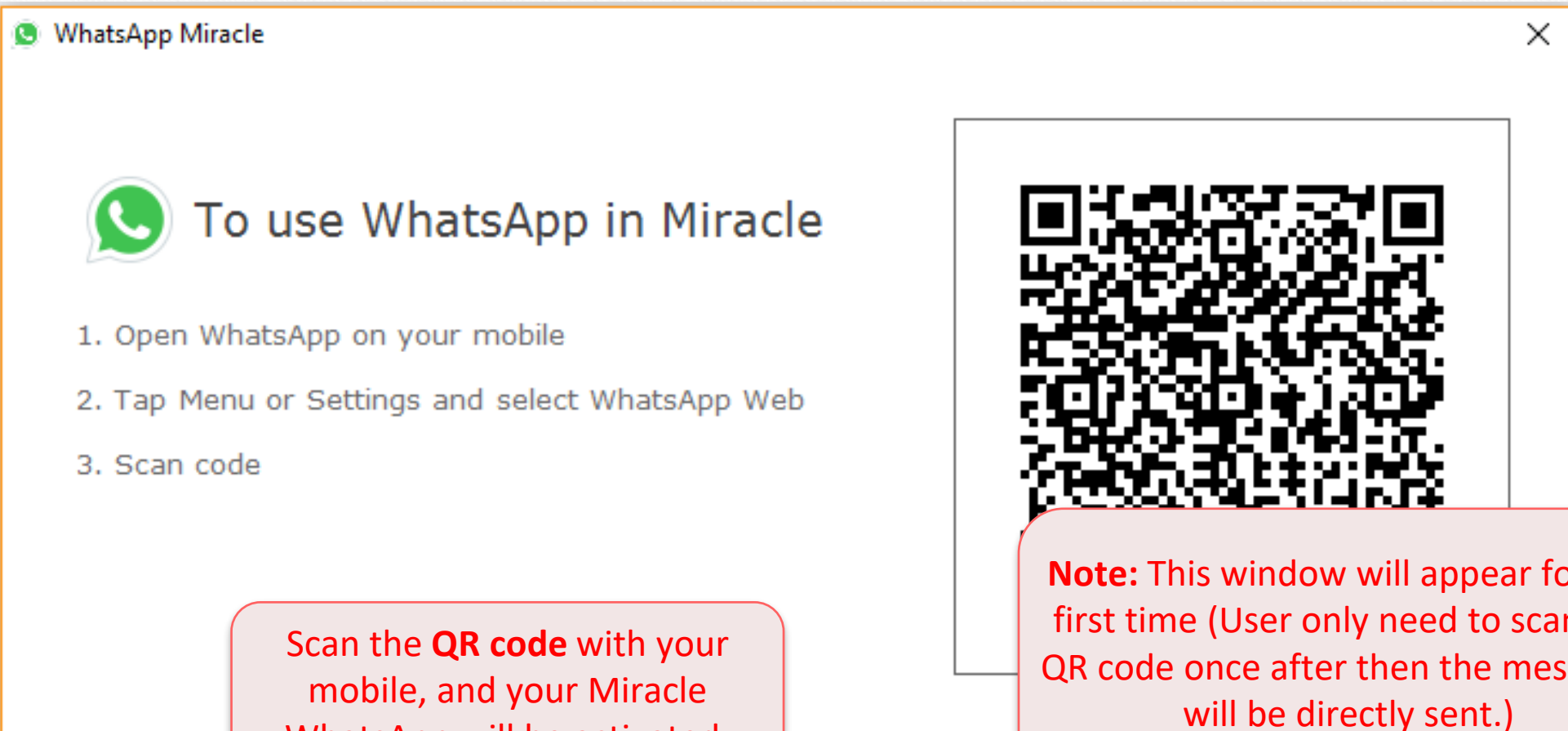
Attachment

After clicking "Send" button, this screen will appear.

Before scanning the QR code,  
switch **ON** WhatsApp and go to  
**WhatsApp Web**.



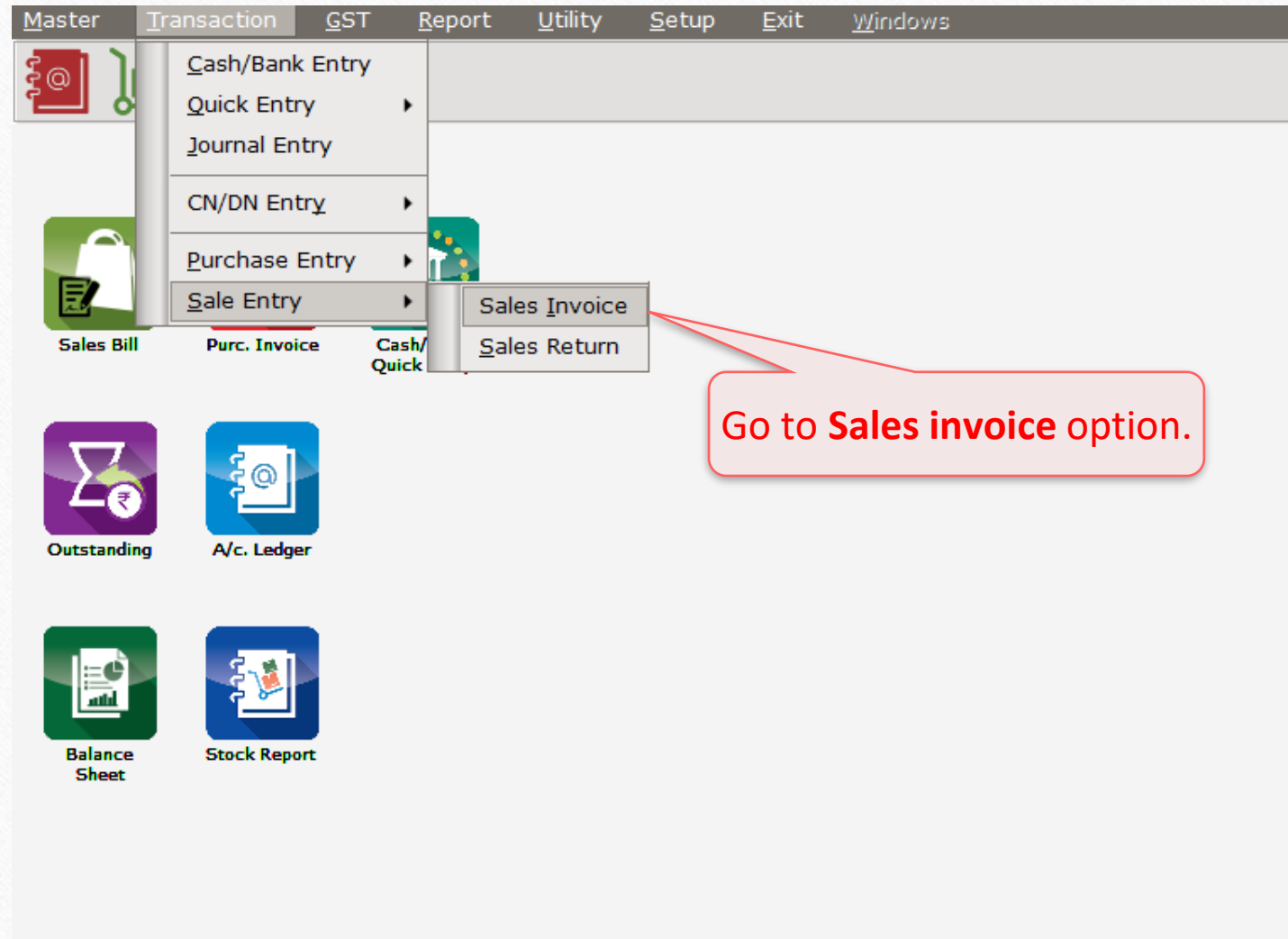




Scan the **QR code** with your mobile, and your Miracle WhatsApp will be activated.

**Note:** This window will appear for the first time (User only need to scan the QR code once after then the messages will be directly sent.)

## Sending Sales Invoice via WhatsApp



[illegible]



WhatsApp

Transaction -> Sale Entry -> Sales Invoice -> Voucher List

**Sales Bill** From 01/04/2019 To 31/03/2020

Date	C/D	Bill No	Tax Type	Account Name	City	Bill Amount
24/09/2019	Debit	GT/1	Tax Invoice	Ascote Engineers		34125.00
25/09/2019	Debit	GT/2	Tax Invoice	Syncify Technology		32813.00
04/11/2019	Debit	GT/3	Tax Invoice	Ascote Engineers		78750.00
04/11/2019	Debit	GT/4	Tax Invoice	Ascote Engineers		787500.00
04/11/2019	Debit	GT/5	Tax Invoice			341250.00
08/11/2019	Debit	GT/6	Tax Invoice			37013.00

**WhatsApp Format**

Format

Itemwise tax - full

Sales invoice

Single Tax - Full Pg

Single Tax-half page

Add Edit Delete Generate Default Format Export Import

If you have already created format, directly click on "Generate" button.

Click "Add" to setup a profile.

Add Edit Delete Vou. Cancel Master Filter Date SMS WhatsApp E-Mail Cover Setup Range Voucher Print Export Copy Vou E-Way Bill Revised

Set Format Name, Mobile No(Party mobile number will be fetched from Account information), WhatsApp Body.

Select the Attachment Type.

The screenshot shows a 'WhatsApp Format' dialog box with the following fields and options:

- Format Name:** Sales Invoice
- Mobile No.:** <<091:Party Mobile No.-1>>
- WhatsApp Body:** Hi, Sending sales invoice, kindly check the attachment.
- Attachment:** A dropdown menu is open, showing the following options:
  - None
  - Single Tax (Full Page)-(GST)
  - Single Tax (Half Page)-(GST)
  - Itemwise Tax (Full Page)-(GST)
  - Itemwise Tax (Half Page)-(GST)
- File Type:**
- Log Type:**
- Ok** button

Red arrows from the text box on the left point to the 'Format Name', 'Mobile No.', and 'WhatsApp Body' fields. A red arrow from the text box below points to the 'Attachment' dropdown menu.

**WhatsApp Format**

Format Name: Sales invoice

Mobile No.: <<091:Party Mobile No.-1>>

WhatsApp Body: Hi, Sending sales invoice, kindly check the attachment.

Attachment: Single Tax (Full Page)-(GS)

File Type: PDF

Log Type:

EXCEL

PDF

PDF Image

WORD

HTML

XML

JPG

BMP

PNG

Ok

ter Date [Icon] E-Mail Cover Setup Range Voucher Print E

Select the File Type.



**WhatsApp Format**

Format Name	Sales invoice
Mobile No.	<<091:Party Mobile No.-1>>
WhatsApp Body	Hi, Sending sales invoice, kindly check the attachment.
Attachment	Single Tax (Full Page)-(GS
File Type	PDF
Log Type	Log With Attachment

Ok

Currently we have selected **Log Type:**

**Log with Attachment** – The log report save message and attachment.

**Log without Attachment** – The attachment will not be saved. Only the log can be seen.

**No log** – Neither message or attachment will be saved.

Click **“Ok”** to save.

**WhatsApp Format**

**Format**

- Itemwise tax - full
- Sales invoice**
- Single Tax - Full Pg
- Single Tax-half page

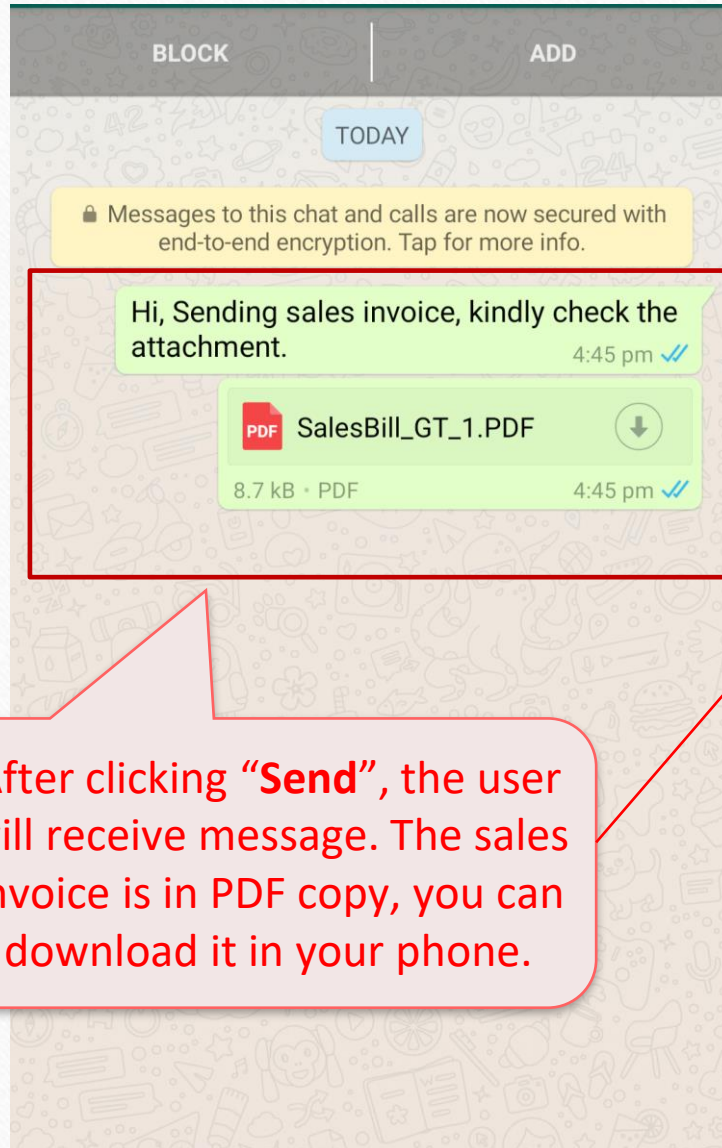
The formats have been successfully created.

Click “Generate” button.

Add Edit Delete **Generate** Default Format Export Import

[illegible]

Click **“Send”** button to send the message/invoice.



whatsapp							
Debit Memo			TAX INVOICE			Original	
M/s. : Ascote Engineers			Invoice No. : GT/1				
			Date : 24/09/2019				
Place of Supply : 24-Gujarat							
SrNo	Product Name	HSN/SAC	Qty	Rate	GST %	Amount	
1	Chipset (Raspberry Pi)		5.000	1500.00	5.00	7500.00	
2	Engine Board Tech		10.000	2500.00	5.00	25000.00	
						</	



# WhatsApp Sales Voucher Setup

Click “**Setup**” to go to Voucher Setup.

Setup -> Voucher Setup -> Setup

Category	Description	Value
Sales Invoice	Apply GST Rules	Warning
	GST Rules to Check	*
	Balance As on Date?	
	Required	
	Party	
	Req. ?	
	ion	
	Overwrite	
	Product history after Product select	
	Online Master Rate Updation	
	Allow Change Rate	
	Allow Change Amount	
	Ask Expense For Each Product	
	Round off in Item Entry	
	Negative Stock Warning	
	Reverse Rate Calculation Required	
	Item Entry Validation Expression	
	Required Closing Stock As on Date?	
	Weight Reading Required ?	
	<b>Sending Options</b>	
	Online Bill Printing	
	Voucher Format Selection Expression	
	<b>Options</b>	
	Online SMS Sending	No
	<b>E-Mail Options</b>	
	Online E-Mail Sending	No
	<b>WhatsApp Option</b>	
	Online WhatsApp Sending ?	No

We will get Four options:

1. No 2. List

3. Yes (With confirmation) 4. Yes (No confirmation)

Double click or press "Enter" key on **Online WhatsApp sending** option.

If we select **List** here then Miracle will show the list of WhatsApp formats.

If we select **Yes** here then Miracle will send the Default selected WhatsApp format.

If we select **Yes (No confirmation)** the WhatsApp will not ask for confirmation.

If we select **Yes (With Confirmation)** then WhatsApp will ask for confirmation before sending message.

Transaction -> Sale Entry -> Sales Invoice -> Voucher List

**Sales Bill** From 01/04/2019 To 31/03/2020

Date	C/D	Bill No	Tax Type	Account Name	City	Bill Amount
24/09/2019	Debit	GT/1	Tax Invoice	Ascote Engineers		34125.00
25/09/2019	Debit	GT/2	Tax Invoice	Syncify Technology		32813.00
04/11/2019	Debit	GT/3	Tax Invoice	Ascote Engineers		78750.00
04/11/2019	Debit	GT/4	Tax Invoice	Ascote Engineers		787500.00
04/11/2019	Debit	GT/5	Tax Invoice			341250.00
08/11/2019	Debit	GT/6	Tax Invoice			37013.00

**WhatsApp Format**

**Format**

Itemwise tax - full

Sales invoice

Single Tax - Full Pg

Single Tax-half page

Add Edit Delete **Generate** Default Format Export Import

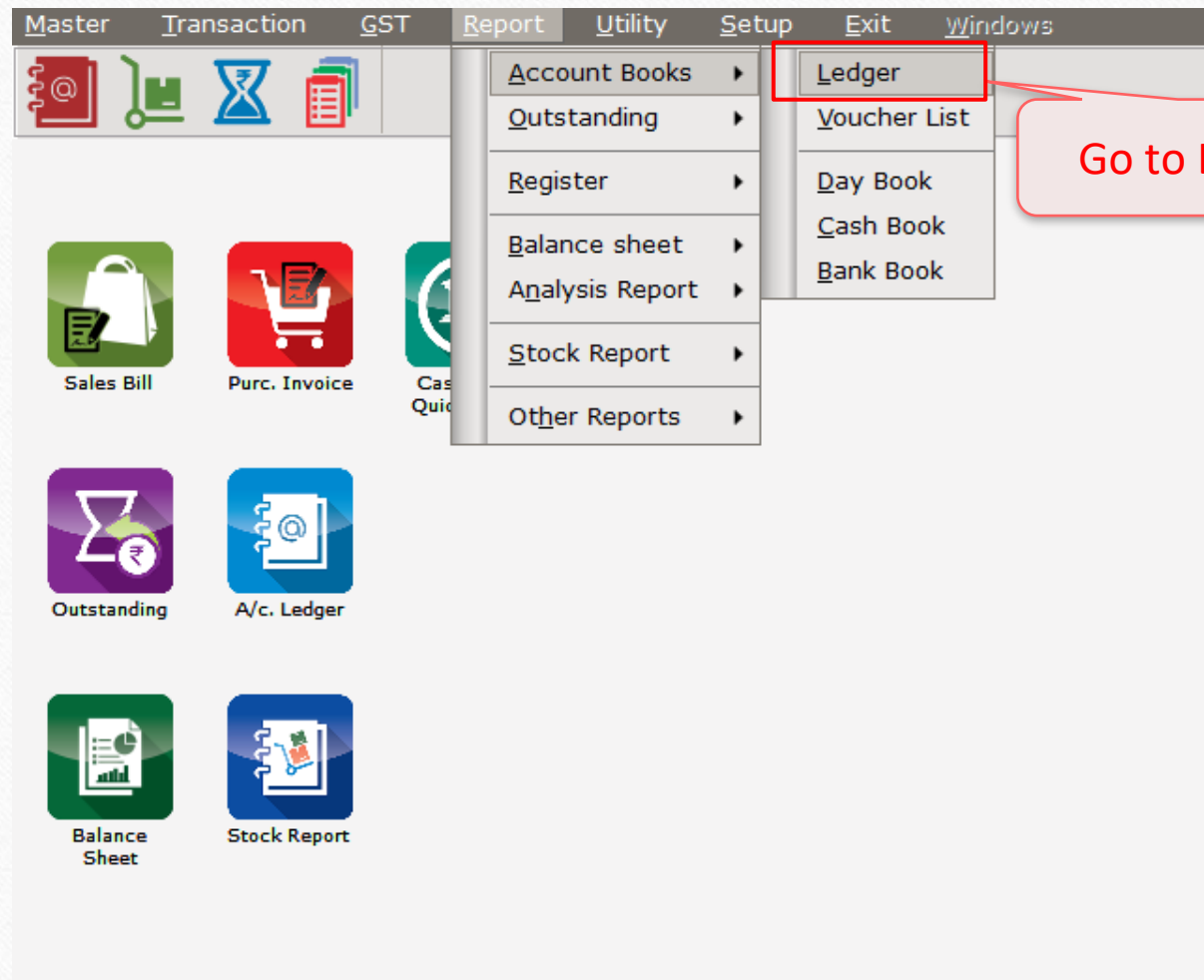
After clicking **List option** this menu will be shown.

Select WhatsApp format, click "**Generate**" button to send this saved voucher through WhatsApp.

Add Edit Delete Vou. Cancel Master Filter Date SMS WhatsApp E-Mail Cover Setup Range Voucher Print Export Copy Vou E-Way Bill Revised



## Sending A/C Ledger via WhatsApp



Master Transaction GST Report Utility Setup Exit Windows			
Report -> Account Books -> Ledger -> Account Ledger			
▼ Account Ledger			
Account Name	City Name	Opening	Closing
Ascote Engineers			34125.00 DB
Cash Account			30000.00 CR
Cash Ledger(Cess) - Pr			30000.00 DB
Cash Ledger(Cess- Inter			
Cash Ledger(Cess- Late Fee) - Primary Unit			
Cash Ledger(Cess- Other) - Primary Unit			
Cash Ledger(Cess- Penalty) - Primary Unit			
Cash Ledger(CGST) - Primary Unit			
Cash Ledger(CGST- Interest) - Primary Unit			
Cash Ledger(CGST- Late Fee) - Primary Unit			
Cash Ledger(CGST- Other) - Primary Unit			
Cash Ledger(CGST- Penalty) - Primary Unit			
Cash Ledger(IGST) - Primary Unit			
Cash Ledger(IGST- Interest) - Primary Unit			
Cash Ledger(IGST- Late Fee) - Primary Unit			
Cash Ledger(IGST- Other) - Primary Unit			
Cash Ledger(IGST- Penalty) - Primary Unit			
Cash Ledger(SGST) - Primary Unit			
Cash Ledger(SGST- Interest) - Primary Unit			
Cash Ledger(SGST- Late Fee) - Primary Unit			

Click “**WhatsApp**” button or press shortcut key (**Ctrl + K**).



**WhatsApp Format**

Format Name: Multi-ledger

Mobile No.: <<161:Mobile-1>>

WhatsApp Body: Hi, I am sending multi ledger, kindly check.

Attachment: Multi Ledger In One Page

File Type: None

Log Type: Multi Ledger In One Page - Vertical Report

er Filter Date E-Mail Kasar Havalala

Select the attachment type and select the file type as shown in Page No – 24.

**WhatsApp Format**

Format Name: Multi-ledger

Mobile No.: <<161:Mobile-1>>

WhatsApp Body: Hi, I am sending multi ledger, kindly check.

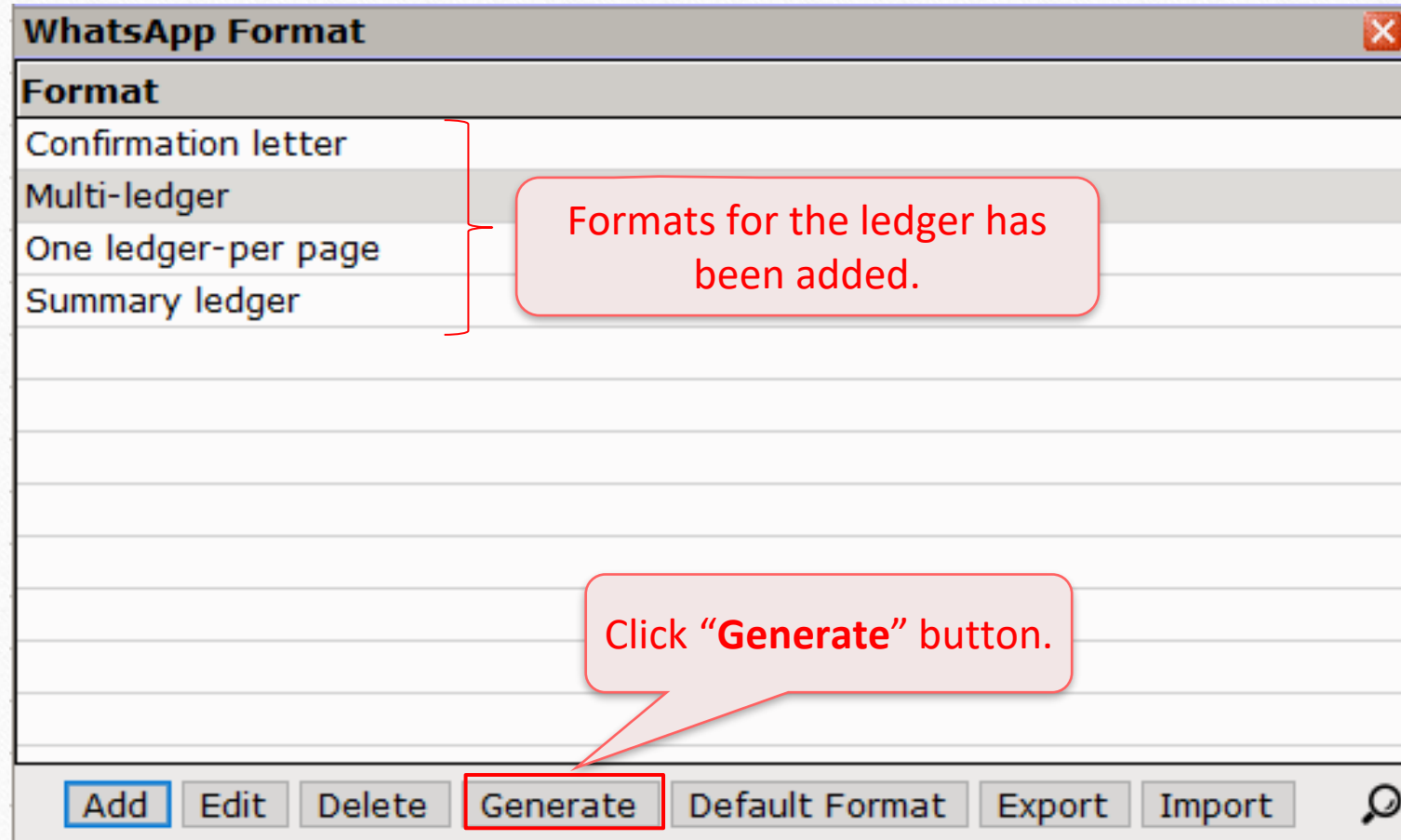
Attachment: Multi Ledger In One Page

File Type: PDF

Log Type: Log Without Attachment

Ok

Select Log type (Log type explanation is in Page no – 25).



WhatsApp Format

**Format**

Confirmation letter

Multi-ledger

One ledger-p

Summary ledg

Generating Attachments....

Working, Please wait.....

Add Edit Delete **Generate** Default Format Export Import

Press "Enter" to select party name.

After loading for a few seconds, this screen will appear.

Generated Messages

Party Name	Mobile
* Ascote Engineers	9662560225
* Honda Automotive	9574778148
Shri Supermarket	7899896589
Syncify Technology	9081166679
* Viraj Consultants	8698756523

Please wait...

Select Select All Invert Selection Detail **Send** Print

After clicking "send" button, the screen will load and the ledger will be sent to other party.





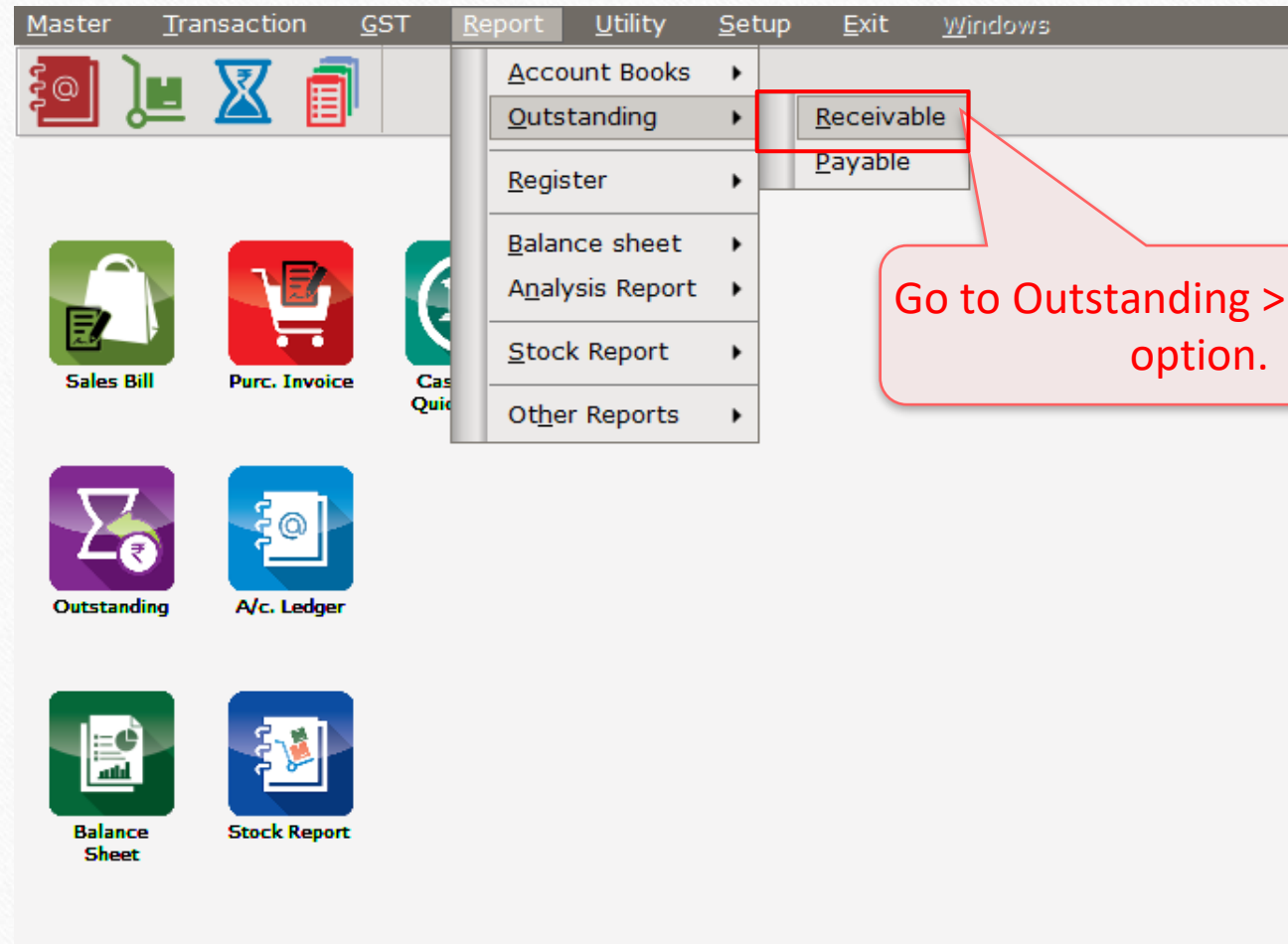
Account Statement For Ascote Engineers  
From 01/04/2019 To 31/03/2020

Page : 1

Credit Particulars	Debit Particulars
236250.00 04/11/2019 Purc	34125.00 24/09/2019 Sale
Purchase A/c. (GST)	Sales A/c. (GST)
131250.00 04/11/2019 Purc	Bill No GT/1
Purchase A/c. (GST)	78750.00 04/11/2019 Sale
	Sales A/c. (GST)
	Bill No GT/3
	787500.00 04/11/2019 Sale
	Sales A/c. (GST)
	Bill No GT/4
	341250.00 04/11/2019 Sale
	Sales A/c. (GST)
	Bill No GT/5
367500.00	
<b>874125.00 DB Closing Balance</b>	
<b>1241625.00</b>	<b>1241625.00</b>

The A/C ledger has been received.  
The format can be seen here.

## Sending Outstanding Reports via WhatsApp



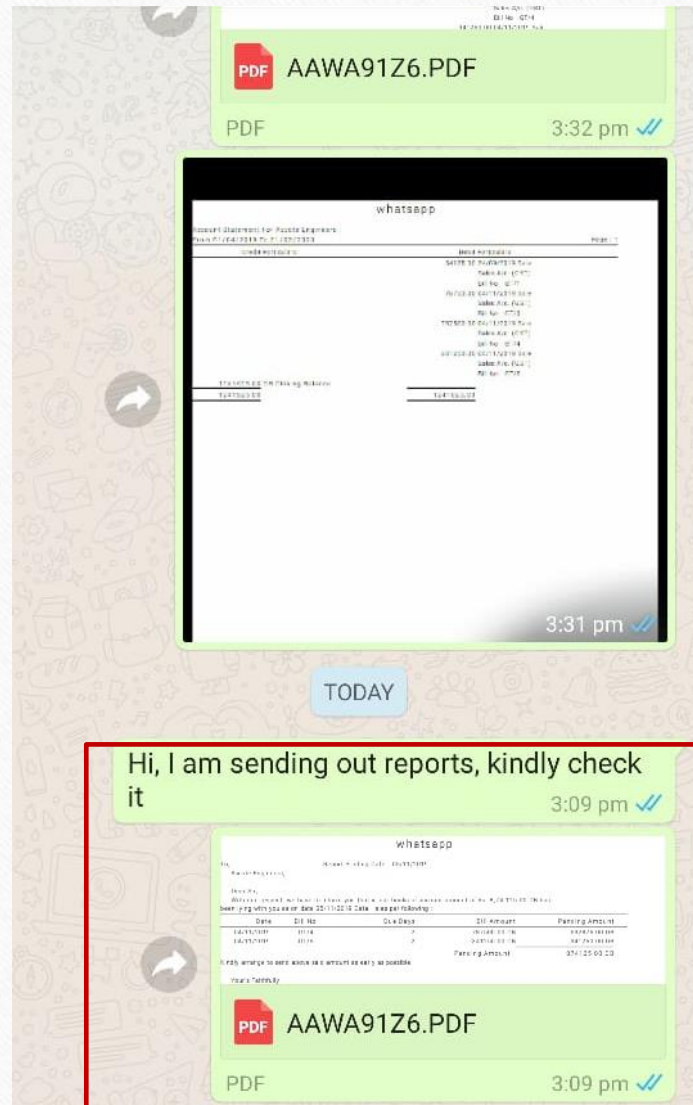
**First, click “WhatsApp” button...**



... then click **“Ok”** .

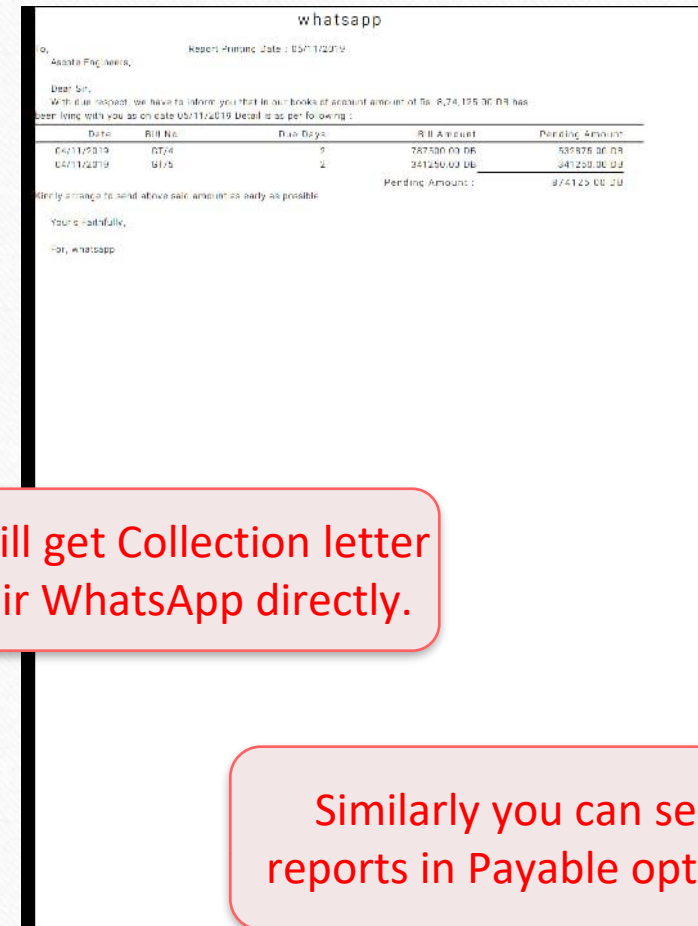
Select the party name and click “**Send**” button.

After clicking “**Send**” button,  
this window will pop-up.



The user will get Collection letter file on their WhatsApp directly.

Similarly you can send other reports in Payable option as well.





# WhatsApp Userwise Security

- ❖ To provide WhatsApp related specific rights to user, Userwise security setup is useful.
- ❖ In the next slide, we have demonstrated how Userwise security can be used to provide specific access.
- ❖ **For more information about Userwise Security, we have created presentation which includes, Companywise and Userwise security in detail.**

User Rights Setup

User Name

- Manager
- USER1**
- User
- USER
- Guest

Menu

Add Edit Delete View Print User Field

+ Analysis Report

+ Stock Report

- Other Reports

- Interest Report
- Form Report
- SMS Report
- Template List
- Missing You No Report
- Template Format
- SMS Format
- E-Mail Format
- WhatsApp Format**
- + E-Mail Report
- WhatsApp Report

  - Profile WhatsApp
  - Other WhatsApp
  - Cancel Voucher Report

+ Utility

+ Setup

+ Company Backup/Restore

+ Year Backup/Restore

+ Data Integrity

+ Company Option

Reset All Export Import Copy Add Edit Delete View Print User Field Save Reset

Warning

Do you want to save the changes?

Yes No

Under manager, USER1 is created.

Userwise security can be applied from Other Reports > WhatsApp format.

After clicking "OK", this window will appear.

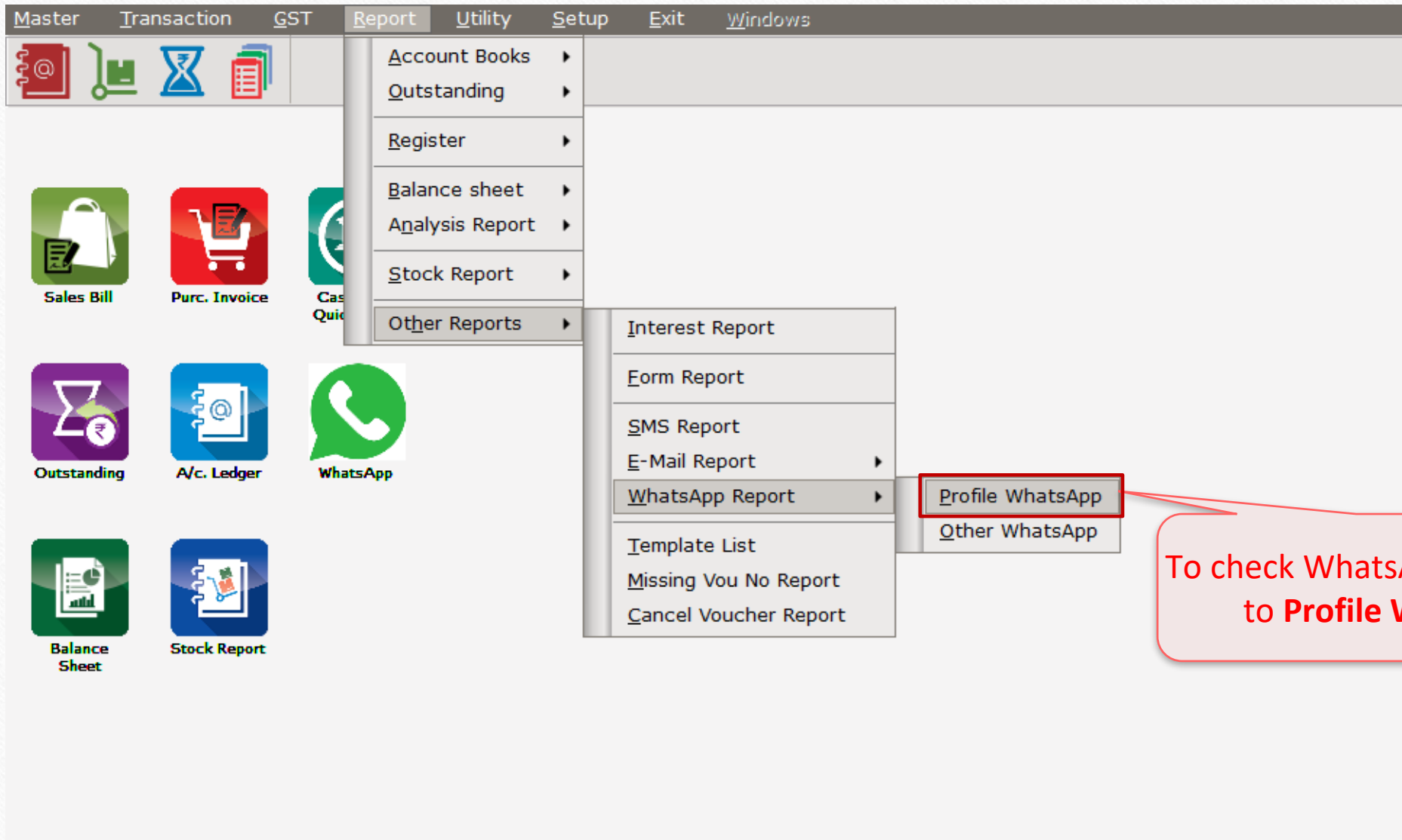
Set Userwise security in WhatsApp Report also.

Click "Save".

# WhatsApp Reports



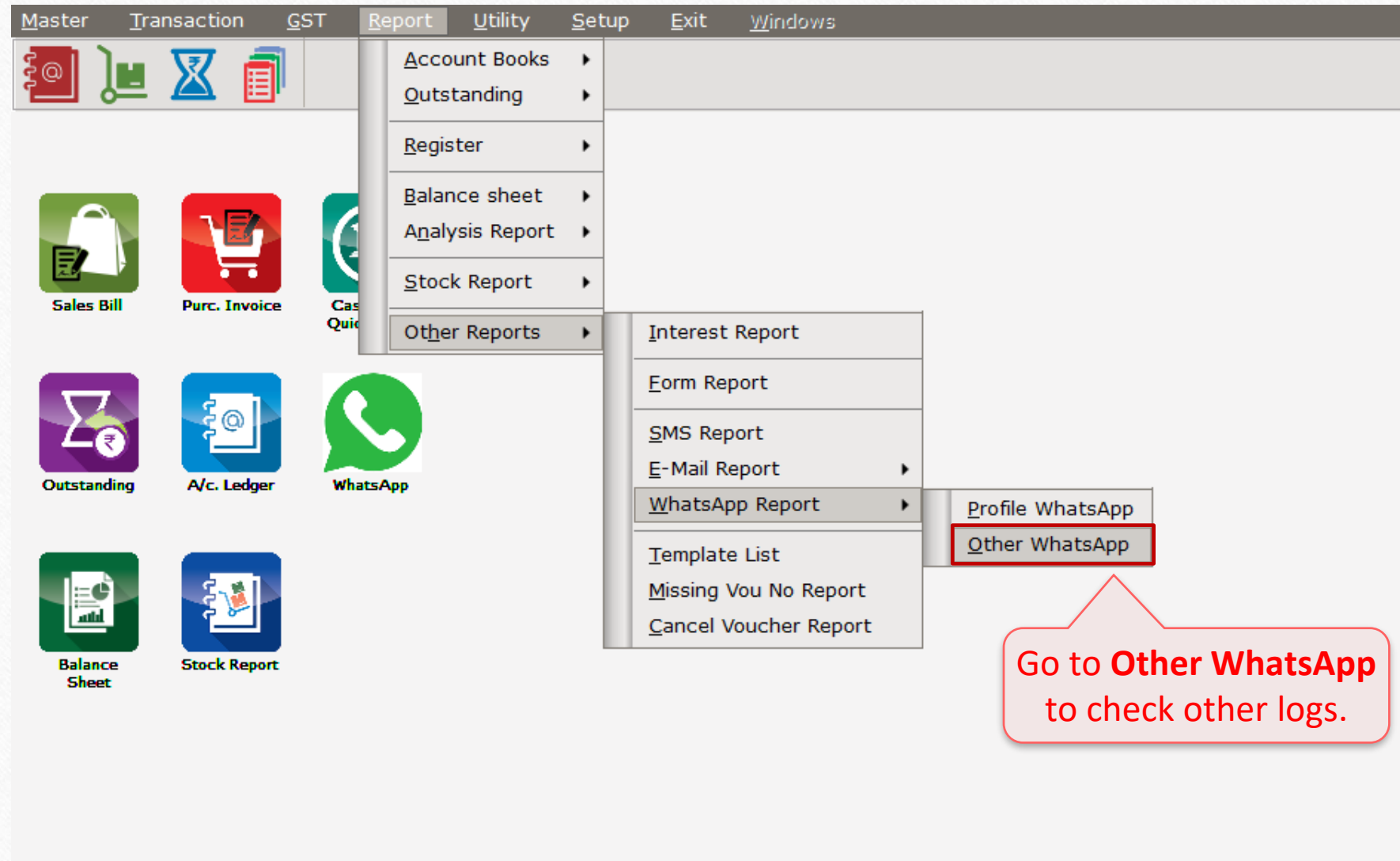
- ❖ Miracle WhatsApp Facility comes with two report types:
  - Profile reports
  - Other reports
- ❖ Profile reports allow users to see WhatsApp log report (Ledger, Invoice etc.), Party name, Date, Time, Mobile number, and Sent status.
- ❖ Whenever, user sends message directly from general WhatsApp, those data will be shown in other reports.



▼ WhatsApp Log Report

From 01/04/2019 To 31/03/2020

[illegible]





All the **Other Log Reports** are available here.

- **WhatsApp facility can make your tasks easier by providing instant option to send messages and files.**
- **If you have any question(s) related to WhatsApp setup. Feel free to contact our dealer support right away!**



 <http://www.facebook.com/miracleaccount>

 <http://www.instagram.com/miracle.accounting>

 <https://www.linkedin.com/company/miracleaccount>

 <https://www.youtube.com/channel/UCWB9FJbbVCOPvgWKUdeA31w>



thank you!