

E-Mail Configuration

A one time configuration allows the user to set-up the E-Mail facility from Tally.ERP 9. While configuring the E-Mail you have the option to select some of the commonly used E-Mail service provider. Based on the E-Mail service selected some of the fields are pre-filled with Server Address, Port Number and Authentication details. Thus making it easy and simple to configure. In case you are using any other service provider to send and receive email from Tally.ERP 9, the respective details need to be provided while configuring the email facility.

On successfully configuring the email, you can send Ledgers, Payslips, Outstanding Statements, Confirmation of Accounts and reminder letters to the respective individuals, parties or customers without using an external email application.

To setup the E-Mail configuration follow the steps shown:

- Go to **Gateway of Tally > F12: Configure > E-Mailing**

The **Configuration** screen appears as shown (Screen 1):

E-Mail Configuration

E-Mail Server : **User defined**

Server Address :
(Name:Port, Default Port is 25)

Use SSL : **Yes**
(Choose Yes, if using Secured SMTP Server)

Use SSL On Standard Port : **No**
(Choose Yes, if using SSL on Default/Standard SMTP Port)

From :

From E-Mail Address :

Authentication User Name :
(Only if required)

Password :

Format : PDF (Portable Document Format)

Page Size : A4

Page Width, Height (in mms) : 210 , 297

1 more ... ↓

Common Mail Servers

- ↓ User defined
- Gmail
- Hotmail
- Yahoo Mail

Screen 1

1. Select the required E-Mail Server from the list of **Common Mail Server** displayed. (**Note** : In case you are not using any of the email services listed, you can select **User Defined** and provide the other details as required.)
2. On selecting the required **Common Mail Server** the server address and port number are prefilled in **Server Address** field.
3. Based on the E-Mail Server selected **Use SSL** is set to **Yes**. This option is used to correspond over a secured network or send mails using secured mail servers. E-Mail Service providers such as **Gmail, Hotmail** and **Yahoo Mail** use a secured network/servers to communicate. (**Note** : Email Service providers user port 465 to communicate over a secured network)
4. Based on the E-Mail Server selected **Use SSL on Standard Port** is enabled . Some of the service providers use the default port (port 25) to communicate over a secured network.
5. In the **E-Mail Server** enter the name of your SMTP server followed by the port number (E.g., smtp.gmail.com:465 or smtp.yahoo.com:455). (Contact the service provider or network administrator for further details).
6. By default the **From** field displays the name of the company that was entered during Company Creation and stored in the company masters.
7. The **From E-mail Address** field displays the e-mail address entered while creating the company. Enter your email address, if you have not done so or if you want to change the email id. This will not be updated to the company master or retained for future use.
8. In case the mail server requires authentication, enter the user name and password in Authentication **User Name** and **Password** fields respectively. (Please contact the System Administrator for further details)
9. By default, **Use SSL** is set to **No**. Set this option to **Yes** to correspond over a secured network or send mails using secured mail servers. E.g., gmail and yahoo use secured servers for communication. (For further details contact the System Administrator)

10. Select the required format from the list of **Formats** displayed. The attachment in the selected format is mailed to the recipient. The format available and their respective parameters are listed below, click on the corresponding link to know more about each format.

- **ASCII (Comma Delimited)**

- **Excel (Spreadsheet)**

- To format the contents of the file select **Yes** in **Excel (Spreadsheet) formatting**.
- Set **With Colour** to **Yes** in order to retain the background colour in the exported file.
- To accept the default **Output Sheet Name** press **Enter** or provide the sheet name of your choice.

- **HTML (Web publishing)**

- Select the required resolution from the list of **Resolutions** displayed. You may opt for higher resolution in order to get quality output. This option will appear when the user has selected **HTML (Web Publishing)** format only.

- **JPEG (Image)**

- Select the required page size from the list of **Paper Sizes** displayed.
- The **Page Width, Height (in mms)** is pre-filled for the standard paper sizes. The user needs to enter the paper dimensions in millimeters on selecting the **User Defined** from the list of **Paper Sizes** displayed.
- Select the required page orientation from the list of **Page Orientations** displayed

- **PDF (Portable Data Format)**

- Select the required page size from the list of **Paper Sizes** displayed.
- The **Page Width, Height (in mms)** is pre-filled for the standard paper sizes. The user needs to enter the paper dimensions in millimeters on selecting the **User Defined** from the list of **Paper Sizes** displayed.

- Select the required page orientation from the list of **Page Orientations** displayed
- **XML (Data Interchange)**

The completed E-Mail **Configuration** screen appears as shown (Screen 2):

E-Mail Configuration

E-Mail Server : Gmail
 Server Address : smtp.gmail.com:465
 (Name:Port, Default Port is 25)
 Use SSL : Yes
 (Choose Yes, if using Secured SMTP Server)
 Use SSL On Standard Port : Yes
 (Choose Yes, if using SSL on Default/Standard SMTP Port)
 From : ABC Company
 From E-Mail Address : santosh@gmail.com
 Authentication User Name : santosh@gmail.com
 (Only if required)
 Password : *****
 Format : HTML (Web-Publishing)
 Resolution : 1024 x 768

Resolutions	
1024 x 768	Recommended
1280 x 1024	
640 x 480	Not Recommended
800 x 600	

Screen 2

Tally.ERP 9 is configured to send emails. You can now email the listed reports without using any third party applications