



# DataLynkr

## **Take Tally Beyond the Finance Team**

**Turn your Tally into a connected ecosystem where every team works with the same live, accessible Tally data.**

**Anywhere. On any device.**



# About DataLynkr

DataLynkr is built by a team with over three decades of experience delivering Tally solutions to businesses across industries in India.

Over the years, we noticed a clear gap: while Tally is powerful, it's often limited to in-office desktops and mainly used by finance teams. Sales, operations, and field teams were disconnected, **missing real-time information and capabilities** they need to act quickly and make informed decisions.

We created DataLynkr to bridge that gap — to bring Tally capabilities to the entire organization, anywhere, anytime. **Tally is seen as a data entry system, but DataLynkr changes that.** By providing real-time access, we enable sales teams, managers and accounting to work together seamlessly, placing orders directly to Tally, improving workflows, accelerating approvals, and ensuring every decision is based on the latest information with zero lag.

For business owners, DataLynkr offers dynamic dashboards and real-time insights, helping them monitor performance and make confident, data-driven decisions from anywhere.

At the same time, we respect your data. **DataLynkr does not store any customer data on our servers.** All information is fetched directly from your Tally system, ensuring your data remains secure, private, and under your control.

Our mission is simple: To empower companies hungry for growth by enabling every team to contribute, access, and leverage Tally data and capabilities — transforming daily activity into insights that fuel smarter decisions in the present and for the future.

With DataLynkr, businesses can break free from the limits of Tally systems, empower their teams, and improve operational efficiency — without compromising data privacy.

# What We Deliver

## Sales Order Management

Modern, mobile-first order placement with real-time inventory and approval controls.

Workflow: **Mobile** / Computer → Order → Optional State in Tally → Manager Approval → Regular Tally Record

### Use Case:

#### Sales Team

- Place orders directly from the field using a mobile device.
- View only their assigned customers and relevant customer information.
- Orders enter Tally in “Optional” state and become final only after approval.
- Check live stock availability across godowns (with optional Yes/No visibility control).
- Use barcode/QR scanning for fast, accurate order entry.
- View the customer’s overdue bills, credit days/limit when placing an order.
- Place lightning-quick orders in draft mode for salesmen who don’t have the time to fill in all the information.

The screenshot shows a mobile application interface for 'Order Entry'. At the top, the time is 2:31 and there are status icons for signal, Wi-Fi, and battery. The app title 'Order Entry' is in the top bar, with a 'Quick' toggle switch on the right. Below the title, there's a search bar with 'BALAJI ENTERPRISES' and a magnifying glass icon. A dropdown menu shows 'Sales Order (Class1)' with a downward arrow. Another dropdown shows 'Details' with a rightward arrow. Below these, there's a red box containing 'Receivable: 2112228 Dr' and a green text 'Credit Limit: ₹0.00 Cr'. A 'Select Item Name' dropdown is followed by a QR code icon. The main section is titled 'Cart (2)' with a 'Clear all' link. It lists two items: 'GRB-Brown Ghee 500mlX24-SSP-Rs.449' and 'GRB-Ghee 500mlX24-PP-Rs.401-Old'. Each item shows its quantity (2), unit (CAR), and price (₹15658.98 and ₹15002.00 respectively). Below the price, it says 'Stock: Yes | Tax%: 5%'. At the bottom, there's a 'LEDGER DETAILS' section with a rightward arrow. It shows a 'Grand Total' of ₹32194.00. Below this, there are three buttons: a yellow button with a paperclip icon, a dark blue button labeled 'Add Details', and a green button labeled 'Place Order'.

(Browser Interface available)

- Attach a picture and place the order.
- Change delivery due date for each item, quantity, rate, value, discount, description (with controls to disable any of these fields or make them constant/unmodifiable).
- Allow placing orders only if salesman is at the desired location of your customer

## Browser Only Feature - Email Order Reading Integration

Connect the email address where you usually get email orders from your customers/salesmen to view these emails directly from your web browser login. These emails can be reviewed on the order entry screen so you can enter the incoming emails as orders by your team

## Benefits

- Decreases order servicing times
- Eliminates unnecessary back-and-forth with finance teams
- Strengthens transparency with customers and sales teams
- Ensures sensitive financial data remains strictly permission-based

## Controls & Configurations

- Make **any field in the order entry customizable**. You can make it editable or constant/unmodifiable(Value, Discount, Rate, etc.)
- Ability to show stock available as “Yes/No” or the actual quantity available when placing an order
- Configure to capture **enquiries and quotations**
- Place new requests
- **Geo-tagged order capture** – orders can be placed only when the salesperson is physically at the customer location

# Extend a Portal For Your Customers

Give your customers secure, self-service access to their own Tally data — **without** exposing any data that you don't need to share

DataLynkr enables you to offer a personalized, role-based portal where customers can view **their** invoices, outstanding bills, track orders, and place new requests.

The result: fewer back-and-forth calls, faster order cycles, improved transparency, and stronger customer relationships — all powered directly by live Tally data.

## What Your Customers Can Do

### Access **Their** Own Financial Records

View **only their** invoices, receipts, bill-wise details, and complete transaction history anytime — securely and permission-based.

### Track **Their** Outstanding & Overdue Payments

Instantly check pending balances, aging bills, and due dates without contacting your accounts team.

### Make Payments Easily

Pay directly using QR code or bank details for faster collections and reduced follow-ups.

## View **Their** Order History in Real Time

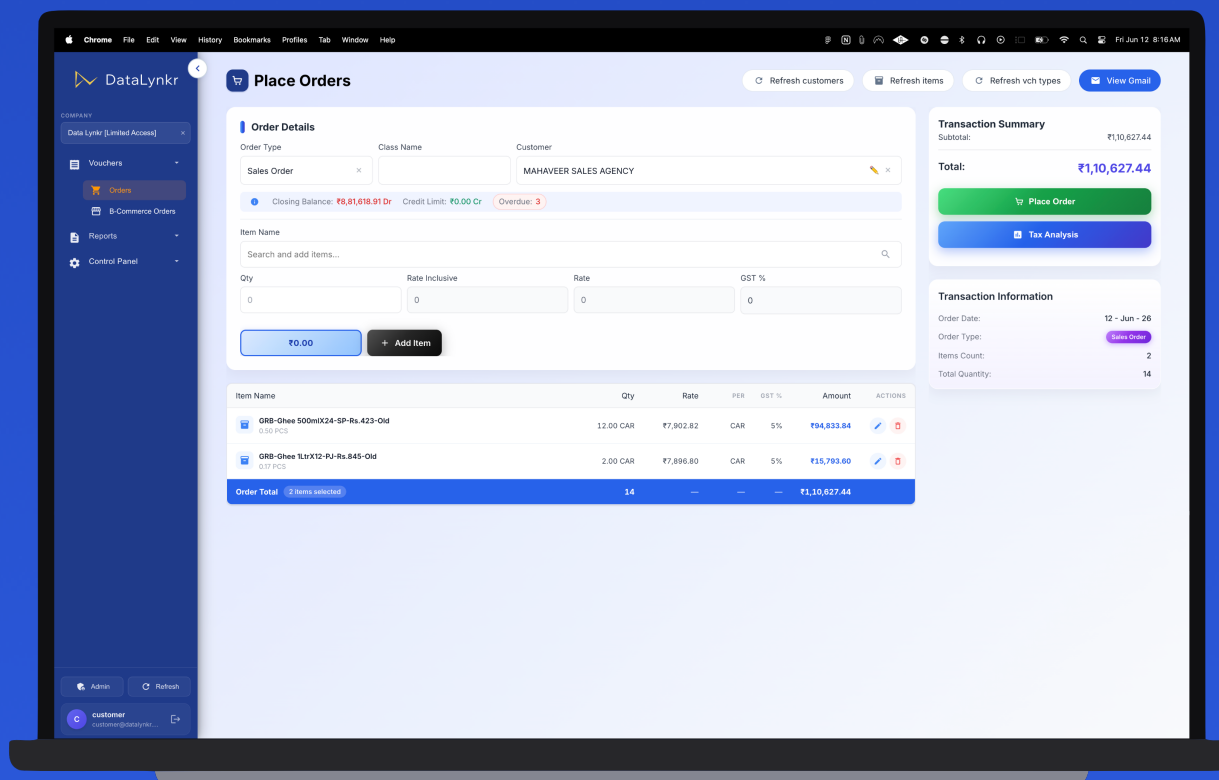
See past orders, fulfilled orders, and partially completed or pending orders with full visibility.

## Attach Supporting Documents

Upload images or attachments while placing orders for clearer communication and fewer errors.

## Place Orders Independently

Submit orders through a secure, personalized portal linked only to their company profile.



(Mobile Interface available)

In the above image, you can see that access is restricted to only “Akhil Marketing”. So if **your** customer was “Akhil Marketing” and you chose to extend access **only to place orders** — Only Akhil Marketing would show up in the customer list. Additionally, if you look at the left navigation menu the customer **only has the option to place orders**. No other options are extended (Refer to the Dashboard section to compare left nav bars)

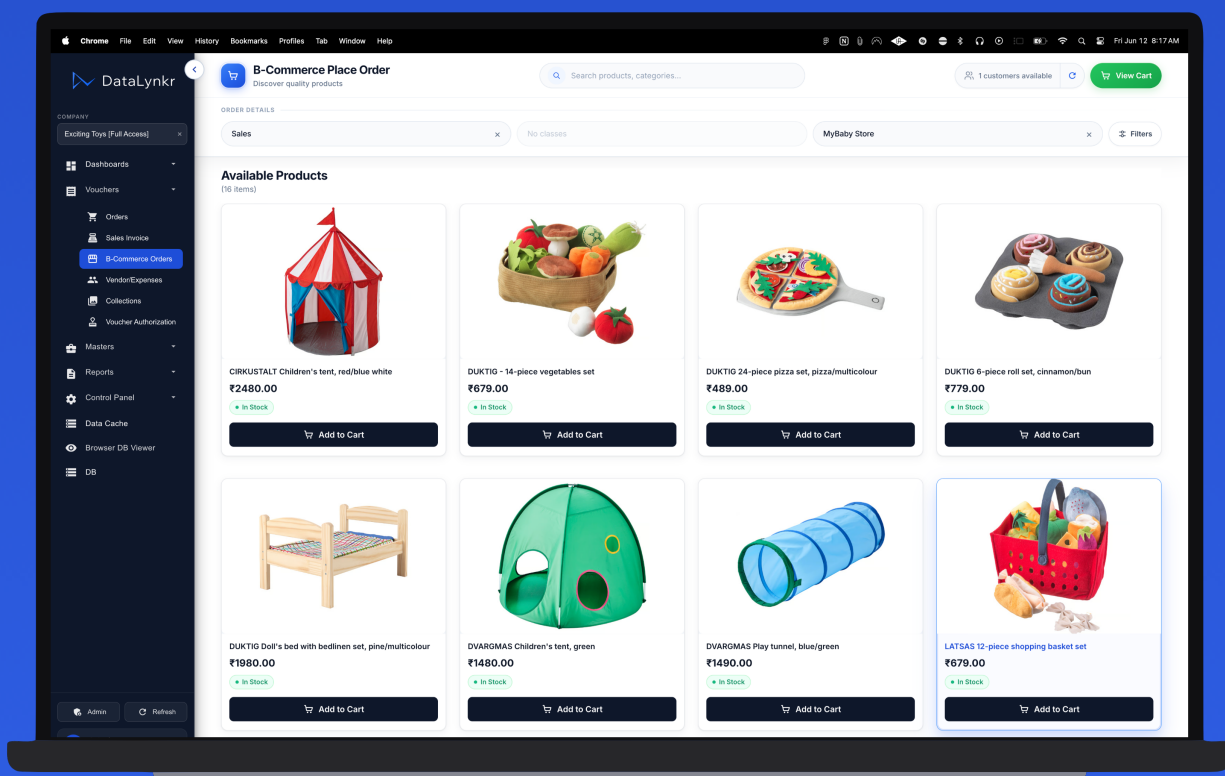
# Modern B-Commerce Ordering Interface

Bring the power of e-commerce style ordering directly into Tally — without the duplicate work.

Many businesses build separate B2B or B2C ordering websites to showcase products with images, descriptions, discounts, sizes, colors, and pricing. While these platforms are great for capturing orders, they create a **major operational challenge: every order still needs to be manually re-entered into Tally** for invoicing, accounting, and inventory tracking. This duplication wastes time, increases errors, and creates inconsistencies between systems.

DataLynkr eliminates this gap.

Our modern B-Commerce interface allows businesses to present their products in a clean, e-commerce style ordering experience while pulling items directly from Tally. When customers place orders through the portal, the orders flow straight into Tally — ready for approval, processing, and invoicing.



## E-commerce style product catalog powered by Tally

Display product images, descriptions, sizes, colors, and pricing in a modern ordering interface. **All you need to do is keep your data organized.**

## Orders flow directly into Tally

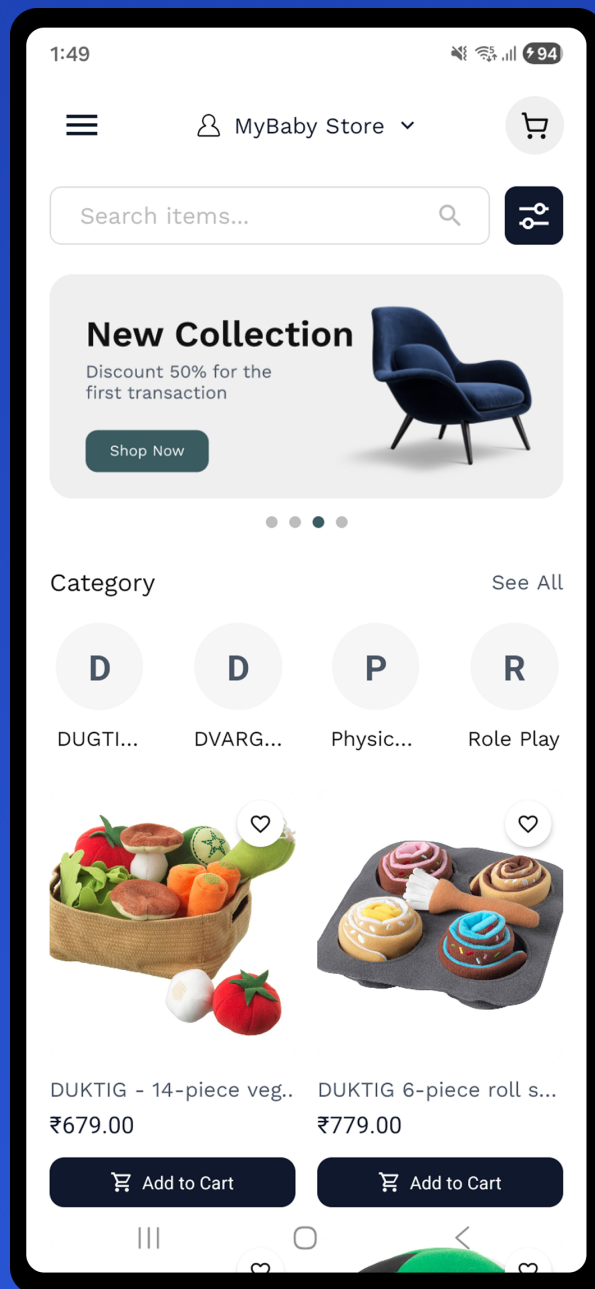
Every order placed through the portal is automatically recorded in Tally — **eliminating manual data entry.**

## No duplicate systems to maintain

Products, pricing, and inventory stay managed in Tally while the portal simply reflects the live data.

## Faster order-to-invoice cycle

Sales orders created by customers can be instantly converted into invoices inside Tally.



# Invoice Creation

Create Invoices Anywhere. Approve With Control. Or Post Directly to Tally.

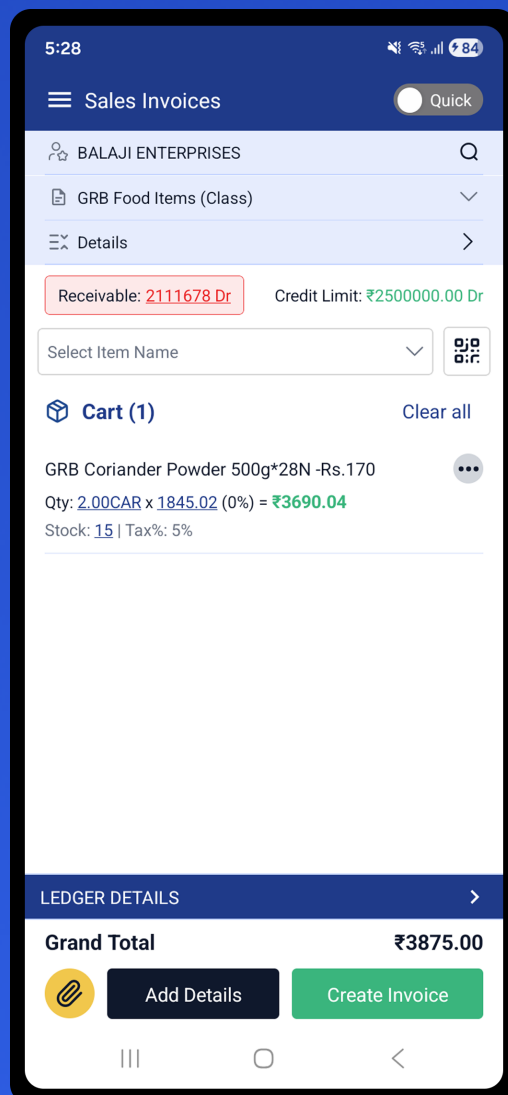
DataLynkr extends invoice creation beyond the office by enabling teams to generate sales invoices directly from mobile devices or the web portal — with optional authorization workflows before posting to Tally.

Workflow: **Mobile** / Computer → Sales Invoices → Optional Approval → Regular Tally Record

## Use Case:

### Sales Team

- Generate invoices directly from the field without depending on office staff.
- Create invoices instantly after delivery or order confirmation.
- Reduce delays between order fulfillment and billing.
- View only their assigned customers and relevant customer information.
- Orders enter Tally in “Optional” state and become final only after approval.
- Use barcode/QR scanning for fast, accurate order entry.



(Browser Interface available)

# Managers & Accounts

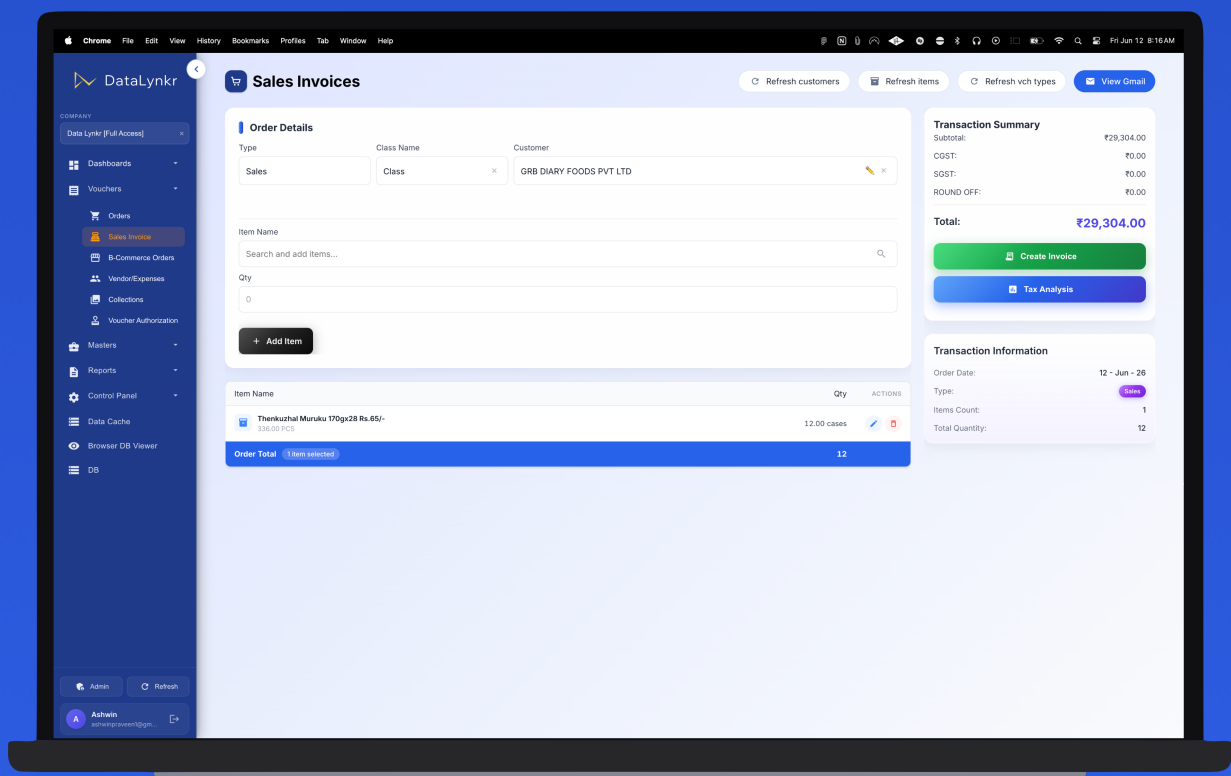
- Configure optional approval workflows before invoices are finalized.
- Review and approve invoices remotely from any device.
- Maintain oversight on invoice value, discounts, and customer-specific controls.

## Benefits

- Faster invoice generation and billing cycles.
- Reduced manual coordination between departments.
- Improved operational speed and customer servicing.
- Approval-based control for sensitive transactions.
- Invoices posted directly into Tally without duplicate entry.

## Controls & Configurations

- Make **any field in the invoice entry customizable**. You can make it editable or constant/unmodifiable(Value, Discount, Rate, etc.)
- Ability to show stock available as “Yes/No” or the actual quantity available when creating an invoice



# Authorization Workflows

Streamline approvals with mobile-ready workflows that keep operations moving.

Workflow: Mobile / Computer → Submit Order → Manager  
Notification → **Approval / Rejection** → Tally Update

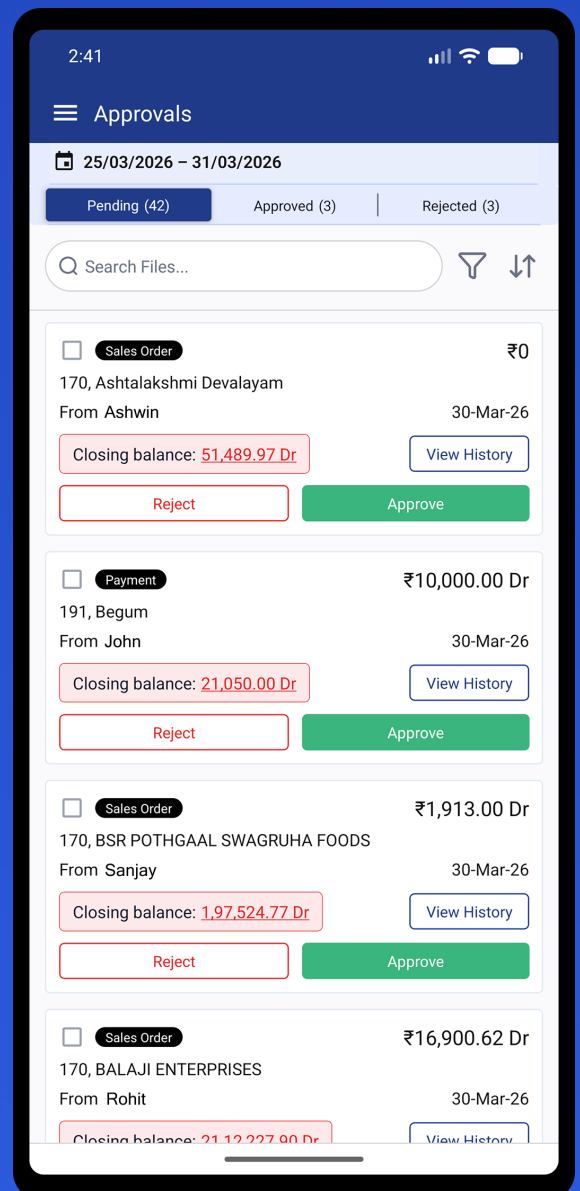
## Supported Approval Requests

- Sales Order Approval
- Sales Invoices
- Payments, Expense claims
- Collections
- Master Creation

## Use Case:

### Sales & Field Teams

- Submit Sales Order for approval to the assigned manager
- Submit travel expenses and tour advance requests instantly.
- View the reason why a Sales Order was rejected and update the order based on comments.
- Track approval status without calling the office.



(Browser Interface available)

## Managers & Owners

- Approve or reject requests from anywhere.
- Maintain complete transparency and control with a digital audit trail.
- Speed up reimbursements and payments, reducing bottlenecks.

## Operations & Accounts

- Quickly process vendor payment requests with clear visibility of pending approvals.
- Accounts can approve expense claims while working with the approver of claims, where both parties have visibility.

## Multi-Level Approval with Smart Escalation & Conditional Routing

DataLynkr now supports fully configurable multi-level approval workflows, enabling businesses to define exactly how orders move through their hierarchy. Whether approvals follow a simple chain (Salesman → Manager → Owner) or a more detailed structure (Salesman → Employee #1 → Manager → Owner), every step is structured, trackable, and transparent.

To ensure business continuity, **higher authorities can securely override** and approve pending requests **if a reporting manager is unavailable**. Additionally, approvals can be triggered conditionally — based on order value thresholds — so only high-value transactions escalate to senior management.

Orders move sequentially based on your defined reporting structure. Automatically trigger approvals only when order value exceeds a predefined threshold.

# Daily Ledger Reports

A secure, role-based ledger view that brings financial clarity directly to your teams and customers.

Workflow: Mobile / Computer → Login →  
Ledger Reports → **Ledger Vouchers**  
**Bill-wise Outstanding**  
**Sales Order Outstanding**  
**Cleared Orders**  
**Past Orders**

## Use Case:

### Sales Team

- Instantly check customer outstanding balances, overdue invoices, and payment history while on the field.
- Reduce dependency on the finance team for quick information before logging orders.
- Access only the customers assigned to them — no exposure to other financial data.
- Track partially-fulfilled/pending orders for a customer/all customers
- View cleared/fulfilled orders for a customer/all customers
- Share Invoices effortlessly from anywhere



(Browser Interface available)

## Benefits

- Keep track of what is yet to be supplied (partially fulfilled orders)
- Ensures sensitive financial data remains strictly permission-based
- Eliminates unnecessary back-and-forth with finance teams
- Reduces delays in sales cycles
- Enable more informed conversations and faster sales decisions.

## Stock Group Summary

A report that shows the total quantity and value of inventory grouped by stock categories, enabling users to monitor inventory flow at a consolidated level from any device via SaaS pulled directly from Tally.

### Use Case:

- Plan Inventory decisions by reviewing current stock present, stock incoming and outgoing across multiple locations/godowns
- Compare quantities and values across groups to spot trends for inventory management and planning
- Plan for low stock - Detect low stock levels at group level to support purchasing decisions.
- Quickly confirm available stock category-wise before approving sales or purchases.

The screenshot displays the 'Stock Item Vouchers' screen in a mobile application. At the top, the title 'Stock Item Vouchers' is visible. Below it, a search bar contains 'GRB-Brown Ghee 100mlX120-PJ-Rs.103-Old'. The date range is set to '01-Sep-25 - 30-Sep-25'. The view is set to 'Inwards' (indicated by a blue circle with a downward arrow) and 'Outwards' (indicated by a purple circle with an upward arrow). The table below shows the following data:

| Particulars                               | Qty       | Value       |
|-------------------------------------------|-----------|-------------|
| Opening Balance                           | 0.00 CAR  | ----        |
| 22-Sep-25 GRB DIARY FOODS PVT LTD         |           |             |
| Inwards                                   | 20.00 CAR | 1,81,397.60 |
| Outwards                                  | ----      | ----        |
| PURCHASE                                  | 20.00 CAR | 1,81,397.60 |
| 27-Sep-25 GRB DIARY FOODS PVT LTD         |           |             |
| Inwards                                   | 20.00 CAR | 1,81,397.60 |
| Outwards                                  | ----      | ----        |
| PURCHASE                                  | 40.00 CAR | 3,62,795.20 |
| 30-Sep-25 DWARAKA SAI ENTERPRISES         |           |             |
| Inwards                                   | ----      | ----        |
| Outwards                                  | 2.00 CAR  | 18,775.10   |
| GRB GHEE ITEMS                            | ----      | ----        |
| 30-Sep-25 VENKATESWARA AGENCY             |           |             |
| Inwards                                   | ----      | ----        |
| Outwards                                  | 5.00 CAR  | 46,937.75   |
| GRB GHEE ITEMS                            | ----      | ----        |
| 30-Sep-25 HALLOW AGENCIES                 |           |             |
| Inwards                                   | ----      | ----        |
| Outwards                                  | 3.00 CAR  | 28,162.65   |
| GRB GHEE ITEMS                            | ----      | ----        |
| 30-Sep-25 LAXMI MADHULIKA AGENCIES (K...) |           |             |
| Inwards                                   | ----      | ----        |
| Outwards                                  | ----      | ----        |
| GRB GHEE ITEMS                            | ----      | ----        |
| CLOSING BALANCE                           |           | 7,25,590.40 |

The bottom navigation bar includes icons for 'Orders', 'Ledger', 'Approvals', and 'Stock'.

(Browser Interface available)

# Offline Transaction Queueing

Work Without Internet. Sync Automatically When Connected.

DataLynkr allows users to continue business operations even in low connectivity or completely offline environments.

Transactions created while offline are securely queued on the device and automatically synced to Tally once internet connectivity is restored.

## Supported Offline Transactions

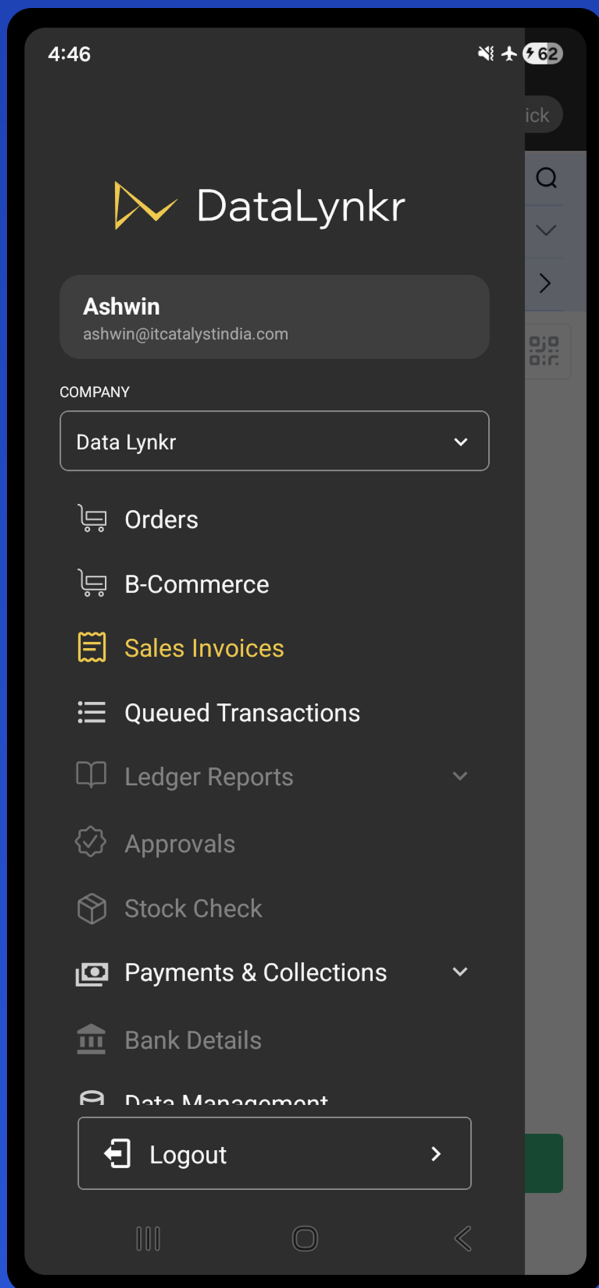
- Sales Orders
- B-Commerce Orders
- Sales Invoices
- Customer Collections
- Vendor Payments
- Expense claims

Workflow: **Offline Mobile Device** → Queue Transaction → Internet Restored → Automatic Sync to Tally

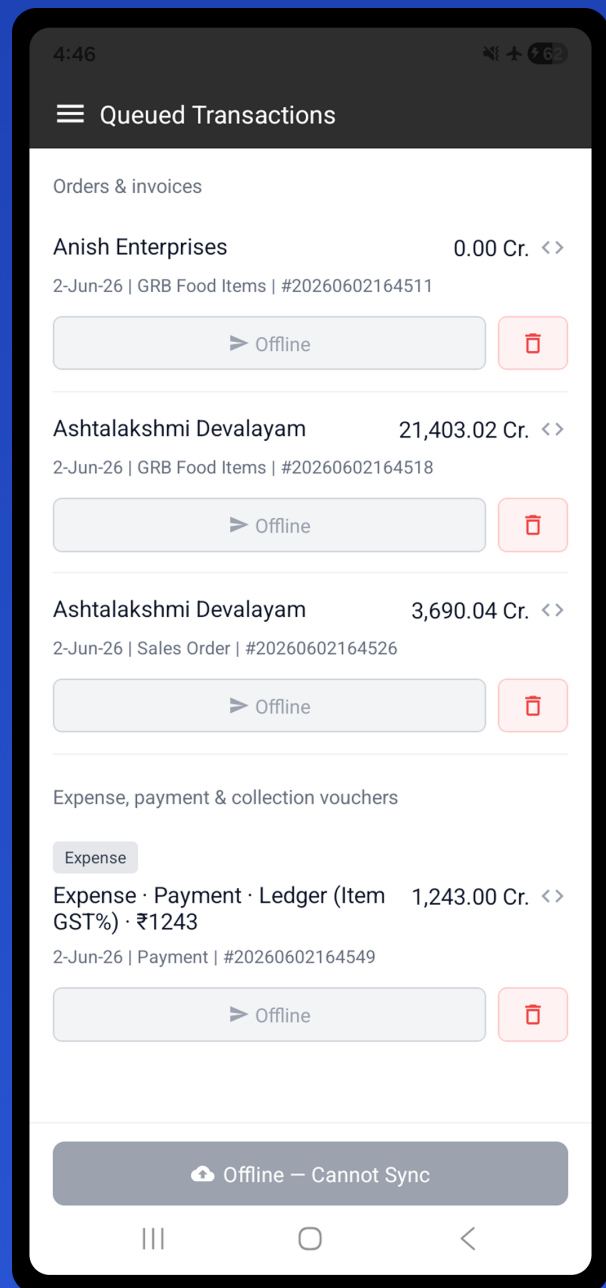
## Use Case:

### Sales Team

- Field Teams operating in low-network regions.
- Sales representatives traveling between customer locations.
- Businesses requiring uninterrupted transaction capture.



Screen Turns Gray to Show that we are Currently Offline



Saved Queued Transactions

## Benefits

- Continue operations without waiting for internet connectivity.
- Prevent loss of transaction data during outages.
- Ensure uninterrupted sales and collection activity.
- Automatically synchronize transactions without manual re-entry.
- Screen turns grey to show that DataLynkr is in offline mode

# Payments, Collections & Expense Management

Manage Financial Operations Anywhere With Mobile-Ready Workflows.

DataLynkr enables businesses to create, review, approve, and manage vendor payments, expense claims, and customer collections directly from mobile devices or the web portal — fully integrated with Tally and supported by optional authorization workflows.

Whether it's outgoing payments, employee reimbursements, or incoming customer collections, every transaction flows through a structured approval process while remaining connected directly to live Tally data.

## Supported Transactions

- Customer Collections
- Vendor Payments
- Expense Claims Sales Invoices

Workflow: **Mobile**/Computer → Create Transaction → Approval → Live Tally Update

## Use Case:

### Sales Teams

- Record customer collections instantly while visiting customers.
- Attach payment references or supporting images directly from mobile.
- Reduce delays between payment receipt and accounting updates.

## Employees & Field Teams

- Submit travel, fuel, accommodation, and operational expense claims instantly.
- Upload bills and supporting documents directly from mobile devices.
- Track approval and reimbursement status in real time.

## Operations & Purchase Teams

- Submit vendor payment requests from anywhere.
- Attach supporting invoices or payment-related documents.
- Option to setup automatic vendor payment system with your vendor with direct Tally to Tally connection between you and your vendor

2:47

< Collections

**Collection Details**

Voucher type

Select Voucher Type

Customer

Select Customer

Description / Notes (max 500 characters)

This will be visible to your manager.

Payment Mode

Select Payment Mode

Amount

₹

Attachment

Cancel Submit for Approval

## Benefits

- Reduces delays in collections, reimbursements, and vendor payments.
- Eliminates manual paperwork and repetitive coordination.
- Improves transparency between departments and management.
- Creates a structured digital approval and audit trail.
- Accelerates financial operations while maintaining approval control.

# Dynamic Dashboards

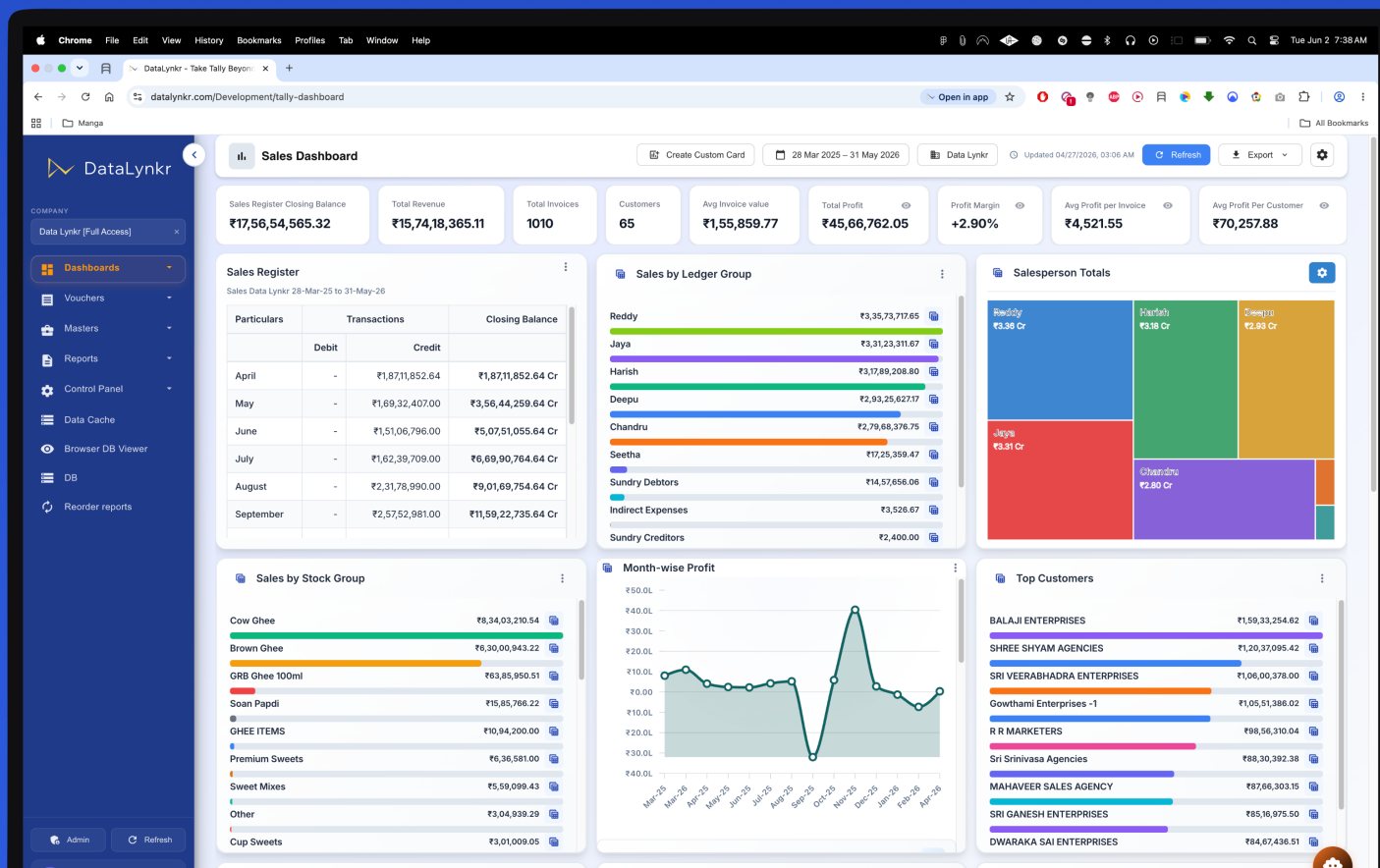
Powerful real-time dashboards that turn Tally data into actionable business insights and give you visibility of your business.

Workflow: Computer → Login → Dashboard

## Sales Dashboards

Real-Time Performance. Actionable Intelligence. Complete Visibility.

The DataLynkr Sales Dashboard transforms live Tally data into powerful visual insights, giving businesses a consolidated view of sales performance, profitability, inventory movement, and team productivity from your computer.



Its interactive filtering capability allows users to click on any customer, salesperson, stock group, or item and instantly update all charts for deeper analysis — eliminating the need to generate multiple reports.

## Insights You Can Derive from the Dashboard

- Identify top-performing and underperforming salespeople.
- Analyze revenue, profit, and quantity trends across customers, items, regions, and sales teams.
- Detect fast-moving and slow-moving inventory.
- Monitor product profitability and identify low-margin items.
- Recognize seasonal sales patterns and demand trends.
- Make informed inventory, pricing, and sales decisions using real-time business intelligence.

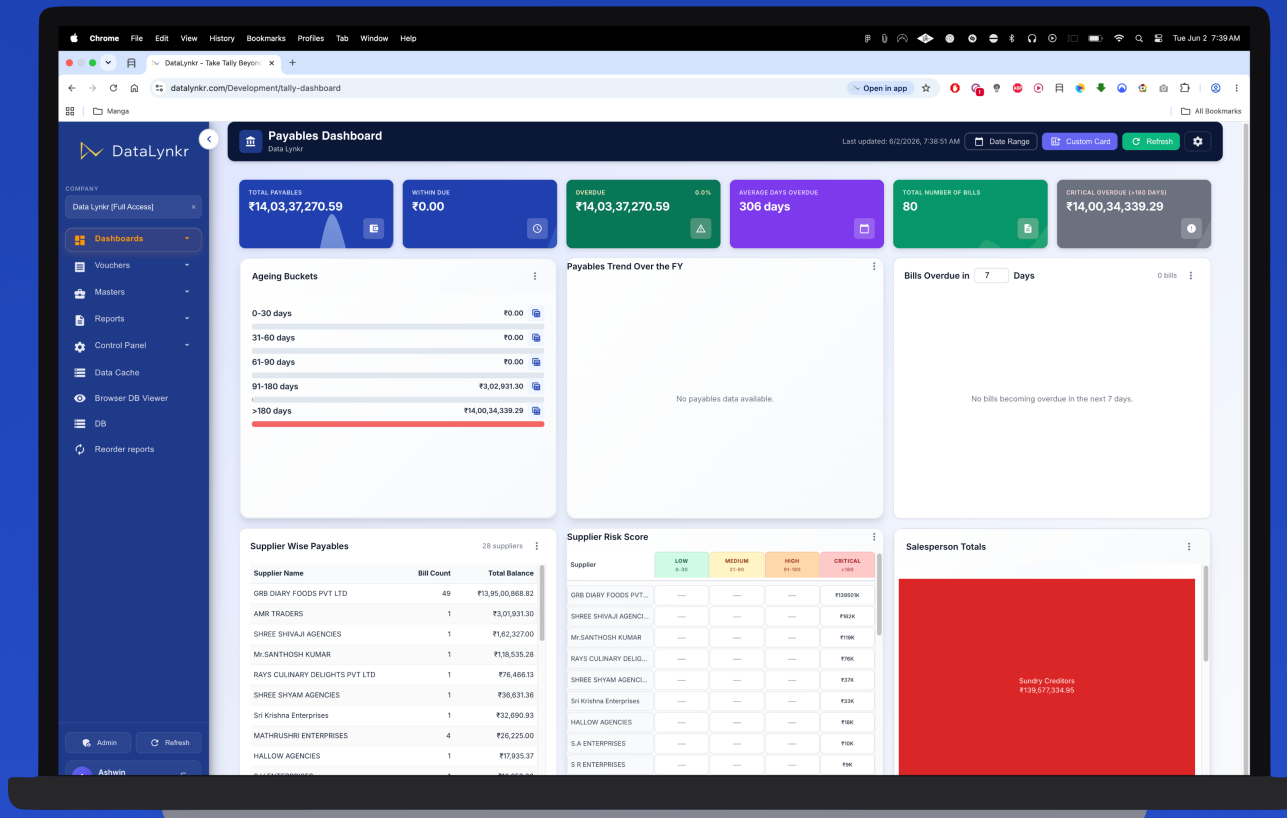
## Receivables Dashboards

Complete Control Over Cash Flow. Real-Time Visibility. Proactive Risk Management.

The DataLynkr Receivables Dashboard provides a real-time view of outstanding payments, customer risk exposure, and collection performance. With aging analysis, receivable tracking, and trend monitoring, businesses can improve collection efficiency and reduce overdue balances.

## Insights You Can Derive from the Dashboard

- Identify customers contributing the highest outstanding balances.
- Monitor overdue trends and aging distribution.
- Detect high-risk customers before balances become critical.
- Track collection performance across customers and sales teams.
- Forecast cash flow pressure based on receivable aging.
- Prioritize collection efforts using real-time visibility into payment behavior.



# Payables Dashboard

Complete Visibility Over Outgoing Payments. Better Planning. Stronger Financial Control.

The DataLynkr Payables Dashboard gives businesses a real-time, interactive overview of vendor liabilities, upcoming payments, purchase-related obligations, and payable trends — all powered directly from live Tally data.

Instead of relying on static payable reports or manual follow-ups, management and accounts teams gain instant visibility into pending vendor payments, aging obligations, payment schedules, and cash outflow exposure from anywhere.

## Insights You Can Derive from the Dashboard

- Identify customers with the highest outstanding balances.
- Track increasing payable obligations across months.
- Forecast upcoming payment pressure and cash requirements.

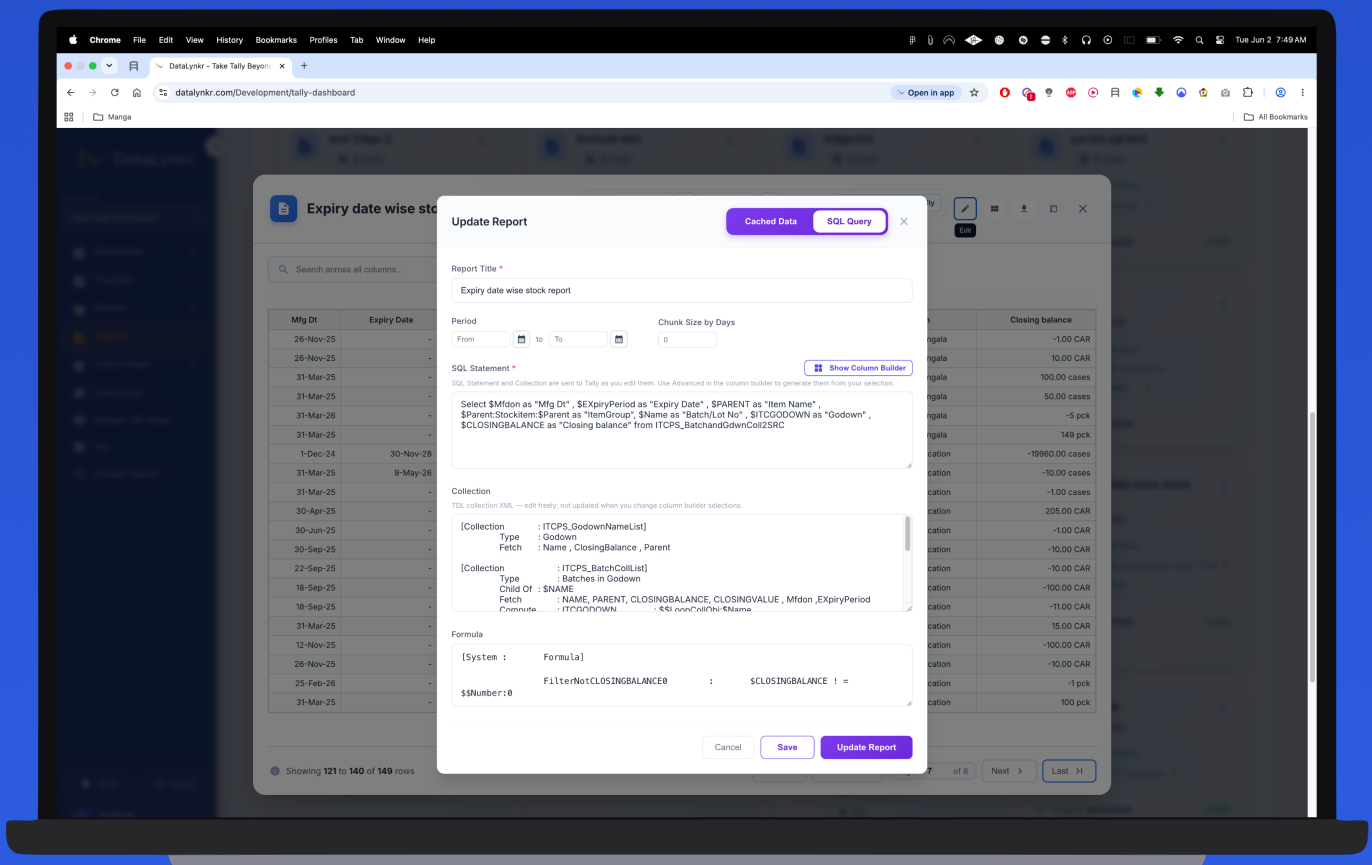
- Monitor overdue vendor liabilities before they become critical.
- Analyze payable distribution by vendor, purchase category, or period.
- Review payable trends to improve working capital planning.
- Compare payable cycles across vendors and business units.

## Advanced Custom Reports with Live Tally Data

## Build Fully Dynamic Reports Using Live Tally Data — Including UDFs.

**DataLynkr's Custom Reports feature gives you complete flexibility to create your own reports using a simple drag-and-drop interface. Without writing formulas, without Excel exports, and without needing technical support — users can build powerful pivot-style reports directly from live Tally data. In Minutes.**

**Select the fields you want. Drag them into rows or columns. Apply filters. Instantly generate structured, dynamic reports tailored to your business questions.**



# What Makes DataLynkr Unique?

DataLynkr is built on four foundational principles that set it apart from traditional Tally extensions and cloud-based integrations. These pillars define how we protect your data, deliver accuracy, and empower your teams.

## Security by Design — Your Data Stays Yours

Most third-party Tally add-ons copy data from your Tally into their own databases, creating unnecessary risk.

DataLynkr does not store any customer data on our servers.

All information is fetched securely and directly from your Tally at the moment it is needed.

This means:

- No duplicate databases
- No external data storage
- No risk of your Tally data being breached on our side

*Your data remains private, controlled, and fully yours — always.*

## Truly Live Data — Zero Lag, Total Confidence

Traditional SaaS tools refresh Tally data at intervals, which can cause delays and spread outdated information across teams.

With DataLynkr:

- Every number is pulled directly from Tally in real time
- Inventory levels are always accurate
- Sales and customers get live information before placing orders
- Decisions are based on the latest Tally state, not a synced snapshot

*Live data means fewer mistakes, faster responses, and confident commitments to customers.*

# Flexible & Customizable — Built to Adapt to Any Business

Tally systems are powerful but inaccessible. DataLynkr introduces flexibility without compromising structure.

You decide:

- Which salespeople can access which customers
- What customers can see when they log in
- Whether stock displays as exact quantities or “Available / Not Available”
- What each user is allowed to view, edit, or request

*From ledger visibility to order permissions to workflow approvals — DataLynkr adapts to your business, not the other way around.*

*It puts control, customization, and simplicity into your hands.*

## Access From Anywhere — On Any Device

Tally is traditionally tied to office desktops and trained operators.

DataLynkr changes that.

- Access Tally data from mobile, tablet, or laptop
- Use a clean, intuitive interface that requires no accounting knowledge
- Work from the office, the field, home, or even halfway across the world

*Whether you're in Goa or Bangalore, your Tally stays with you — secure, accessible, and easy to use.*

**These pillars come together to deliver a modern Tally experience — secure, real-time, flexible, and accessible — built for businesses that want to move faster, operate smarter, and grow without limits.**



# About IT Catalyst

Behind DataLynkr is IT Catalyst Software (India) Pvt. Ltd., a technology company that has spent more than two decades building advanced solutions around Tally for businesses across India.

Founded in 2003 in Bengaluru, IT Catalyst has worked with over 50,000 organizations, helping them extend Tally beyond traditional accounting into a powerful operational backbone for their businesses.

As a 5-Star Certified Tally Partner and member of the Tally Excellence Club, the company combines deep product expertise with practical industry knowledge to design solutions that integrate finance, operations, sales processes, and management insights into a single connected system.

Over the years, IT Catalyst has partnered with businesses across industries to streamline workflows, automate processes, and unlock greater visibility from the data already present in their Tally systems. By focusing on practical, scalable solutions, the company enables organizations to operate more efficiently while making faster, better-informed decisions.

Throughout this journey, IT Catalyst has remained focused on one core objective: making business systems simpler, more connected, and more intelligent.

**DataLynkr represents the next evolution of that vision — transforming Tally from a desktop accounting tool into a real-time, organization-wide platform accessible from anywhere.**

**Let Us Show You What Your Tally Is Missing.  
Book a live demo and see your own data in  
action.**

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