

## Lesson 14: Tally.NET and Remote Capabilities

### Lesson Objectives

On completion of this lesson, you will learn how to

- ❑ Configure Tally.NET Features
- ❑ Connect Company on Tally.NET
- ❑ Create and Authorise Remote Users
- ❑ Access Company data Remotely

### 14.1 Overview of Tally.NET

Tally.NET is an enabling framework which establishes a connection through which the remote user can access the Client's data without copying / transferring the data. In other words, the remote user can access the company data, provided the Company is open and connected on Tally.NET.

Using Tally.NET features, the user can create remote users (ids), authorize & authenticate them for accessing the connected (available) companies. The remote users can be mapped to a particular user and assigned security controls based upon their security levels (viz., Tax Auditor / Administrator, Standard User etc.). The remote user can further create sub-ids under him to assign tasks based on their security levels.

The user making the company available and a person accessing the data behave as clients to Tally.NET, thereby rendering a secure exchange system.

#### Tally.NET Features

Tally.NET is a default feature available in the product and provides the following host of capabilities.

- ❑ Connect companies from Tally.ERP 9
- ❑ Create and maintain Remote Users
- ❑ Synchronization of data (via Tally.NET)

- Remote access of data by authorised Remote User(s)
- Use online help and support from Tally or the browser
- Use Control Centre for centralised Account Management
- Remote availability of Auditors' Edition of Tally License

As discussed above, Tally.NET is enabled in Tally.ERP 9 but however, certain configurations are required to be setup for enabling Company data to get connected. Follow the steps given below :

1. Configuring Tally.NET features
2. Creating and Authorising Remote Users

## 14.2 Configure Tally.NET Features

To configure Tally.NET follow the steps shown:

Go to **Gateway of Tally > F11: Features > F4: Tally.NET Features**

- The **Tally.NET Features** screen appears.
- In the **Registration Details** section:
  - In the **Connect Name** field provide a specific name with which the company is displayed on **Tally.NET** servers.
  - Provide the name of the contact person in the field **Contact Person Name**.
  - Provide the Mobile/Telephone numbers of contact person in the field **Contact Number**
- The name of the contact person and the contact number are published alongwith **Company Name, Account ID** and **Serial Number** in the **List of Companies** screen.
- In the **Connect for Remote Access** section,
  - **Allow to Connect Company** is set to **Yes**, in case you want the company to be connected for remote access.
  - **Contact on Load** is set to **Yes**, when you want the company to be connected for remote access on loading.
  - Press **Enter** to accept.

The completed **Tally.NET Features** screen is displayed as shown:

Company: Alfa Associates

**Tally.NET Features**

**Registration Details**

Connect Name : Alfa Associates  
Contact Person Name : Jacob  
Contact Number : 9900012345

**Connect for Remote Access**

Allow to Connect Company ? Yes  
Connect on Load ? Yes

Accept ?  
Yes or No

F1: Accounts F2: Inventory F4: Tally.NET

Figure 14.1 Tally.NET Features

- **Accept** to save the Configurations



- You must set **Security Controls** to **Yes** while creating/altering a company, in order to enable **Tally.NET** in **Tally.ERP 9**.

### 14.3 Connect Company on Tally.NET

To connect the company on **Tally.NET**,

Go to **Gateway of Tally** > press **F4: Connect**.

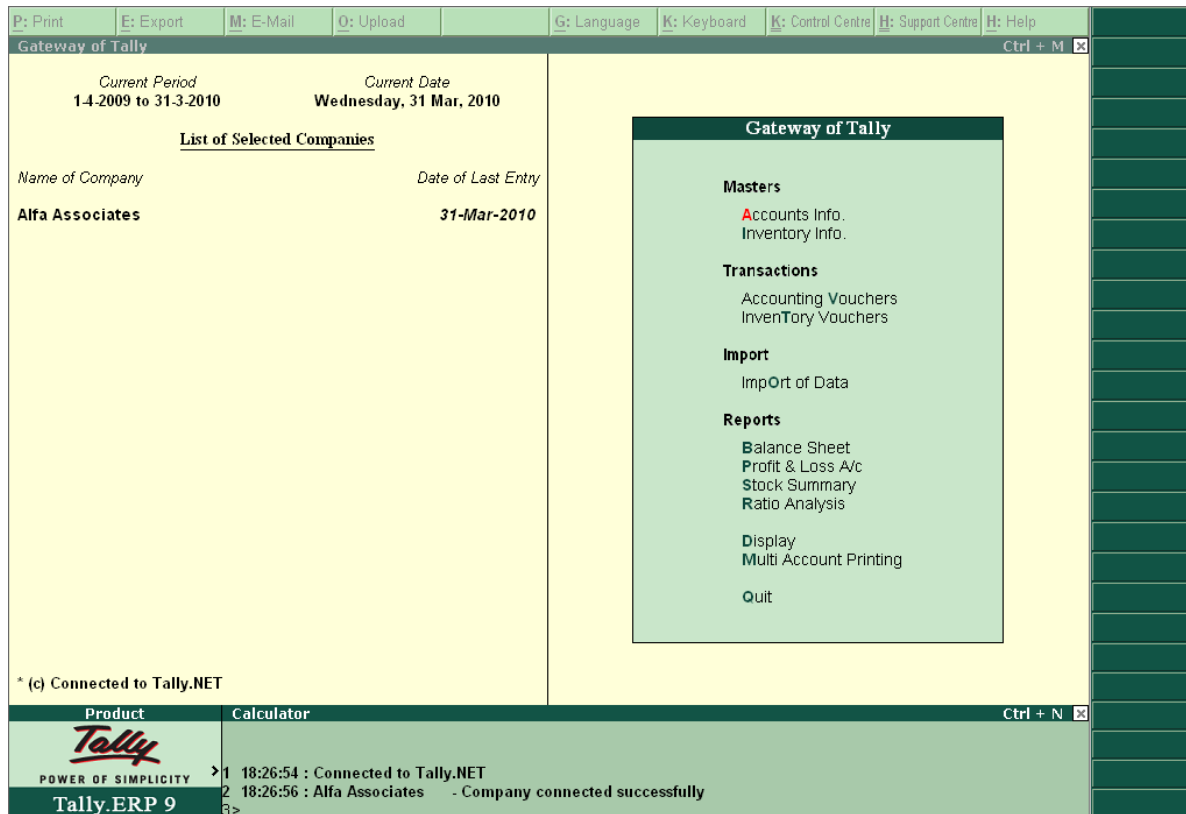


Figure 14.2 Connected to Tally.NET

A message **Company connected successfully** is displayed in the **Calculator** panel. In the same way to disconnect a Company from Tally.NET,

Go to **Gateway of Tally**,

- Press **F4: Disconnect**

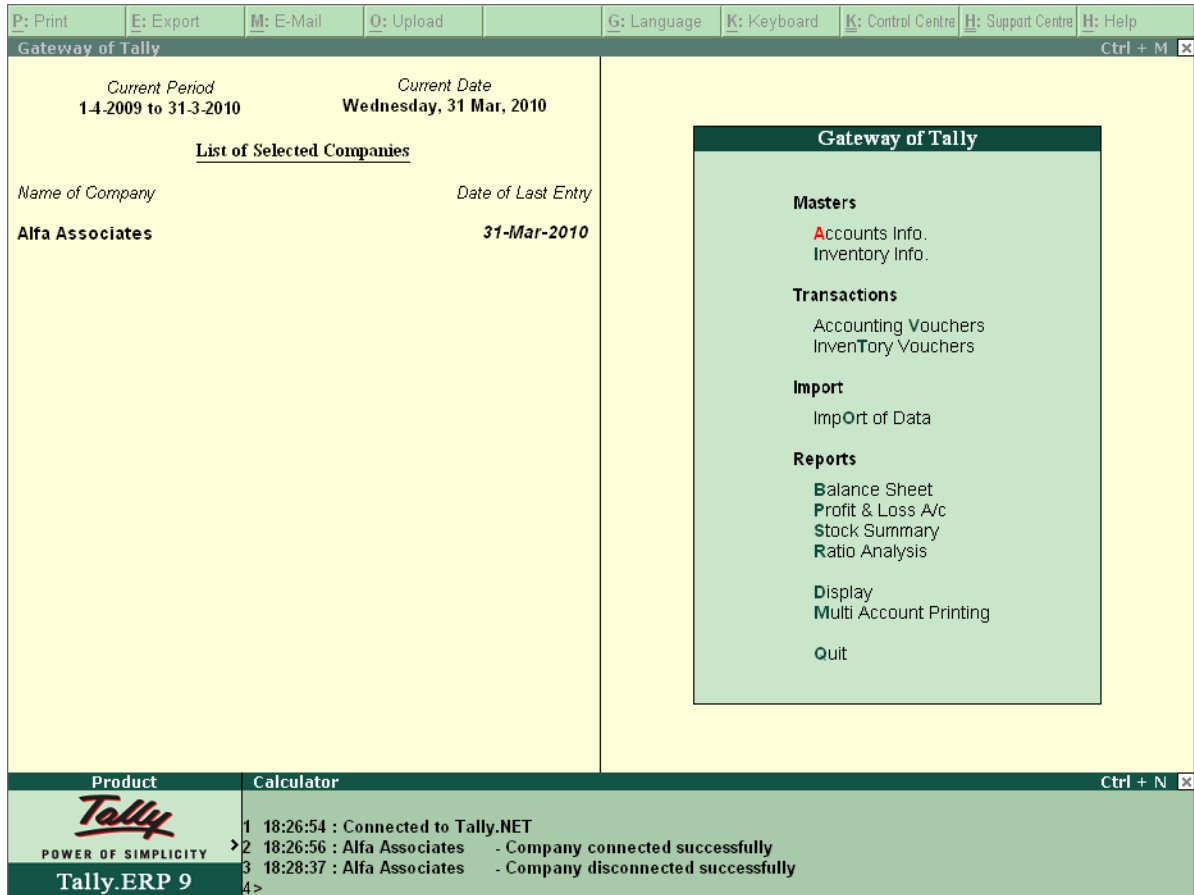


Figure 14.3 Disconnected from Tally.NET

A message **Company disconnected successfully** is displayed in the **calculator** panel.

## 14.4 Create Remote Users

Tally.ERP 9 allows you to connect from a remote location and access your data. The Remote users are broadly classified into two security levels, namely:

- ❑ **Tally.NET User:** can access data from a remote location.
- ❑ **Tally.NET Auditor:** can audit data from a remote location, subject to using Auditor’s Edition of Tally.ERP 9.

To create the remote users:

Go to **Gateway of Tally**

- ❑ Click **K: Control Centre** or press **Ctrl + K**.
- ❑ The **Login as Remote Tally.NET User** screen is displayed.

- Enter the required **Account ID** in the **Your E-Mail ID** field and Password in **Your Tally.NET Password** field. The password is sent by e-mail separately to the email address provided while activating **Tally.ERP 9**.

Login As Remote Tally.NET User

Your E-Mail ID : **tallynetnormal1@tallysolutions.com**

Your Tally.NET Password : XXXXXXXXXX

*(if you have forgotten your Tally.NET Password, please press F5:Reset Password. A new password will be sent to your E-Mail address, and you can then login).*

Figure 14.4 Login as Tally.NET User

- Press **Enter**

The **Control Centre** screen appears as shown:

**Control Centre**

Tally.NET ID : **tallynetnormal1@tallysolutions.com**

**M : My Tally.NET Accounts**  
... Administer your Tally.NET Accounts for Users, Licensing, and Security. You can even remove your own ID from one of them.

**J : Jobs & Recruitment (Coming soon)**  
Search for people, publish your requirements, give Online Examinations to judge whether candidates possess the required knowledge.

**S : Shop (Coming soon)**  
... buy Tally products, subscriptions and extensions from Tally marketplace.

**T : My Active Sessions**  
... In case you are logged in from more than one machine, or an earlier session was not properly 'logged out' from, you could examine and delete the sessions.

**P : My Profile**  
...some details about you, which others may find useful.

**W : My Password**  
... control your password. You are advised to change it whenever you feel that others know it, or just change it periodically to be extra safe.

1 more ... ↓

Figure 14.5 Control Centre

- Select **My Tally.NET Accounts**, the **My Tally.NET Accounts** screen appears

My Tally.NET Accounts		Alfa Associates			Ctrl + M	
My Tally.NET Accounts						
Tally.NET ID : tallynetnormal1@tallysolutions.com						
S.No.	Account ID	Security Level	Tally.NET User	Site ID	Admin	Status
1	tally1@tallysolutions.com	Standard User	Yes	Primary	No	Active
2	tallyberhampur@rediffmail.com	Owner	Yes		No	Active

Figure 14.6 List of Tally.NET Users

- ❑ Select the required **Account ID** and press **Enter**.
- ❑ The **Control Centre** for the selected **Account ID** screen appears

To view **User Management** screen, select **User Management** and press **Enter**

To create **Remote Users**, execute the following steps:

- ❑ Select **Standard User** from the list of **Security Level**.
- ❑ Enter **user@tallysolutions.com** in the **Tally.NET ID** field and press **Enter**.
- ❑ Set **Yes** to **Tally.NET User** in case you want this user to access data remotely
- ❑ Based on your requirement, select the required status from the list of **Status**.
- ❑ Similarly you can create the required **Tally.NET User**.

User Management		Alfa Associates		Ctrl + M	
User Management					
Account ID : tallyberhampur@rediffmail.com					
S.No.	Security Level	Tally.NET ID	Tally.NET User	Status	
1	Owner	tirumulainfobam@sify.com	Yes	Active	
2	Owner	mihir1a@rediffmail.com	Yes	In-Active	
3	Owner	drageswarraodora1@rediffmail.com	Yes	Active	
4	Owner	tallynetnormal1@tallysolutions.com	Yes	Active	
5	Owner	tallynetauditor@tallysolutions.com	Yes	Active	
6	Standard User	user@tallysolutions.com	Yes	Active	
7	Owner	tallyberhampur@rediffmail.com	Yes	Active	
8	Owner	sibani.mohapatra@gmail.com	Yes	Deleted	

Accept ?  
Yes or No

6 Tally.NET user(s) out of 10

Figure 14.7 User Management

- Accept to save the new **Tally.NET User** that has been created



- *The company's system administrator should authorise the **Tally.NET User ID** and connect to **Tally.NET** and allow remote access.*
- *A brief write-up about each feature of the **Control Centre** is discussed under the section **Features of the Control Centre***

## 14.5 Authorise Remote Users

Once the Company is registered and connected, the system administrator can authorise users created under **Tally.NET User** security level to access by logging in from a remote location. To authorise the remote users to login follow the steps shown:

### Authorise Remote User

Go to **Gateway of Tally** > Press **Alt + F3**

- The **Company Info.** menu appears
- Select **Security Control** > **Users and Password**



The **List of Users for Companies** screen is displayed as shown.

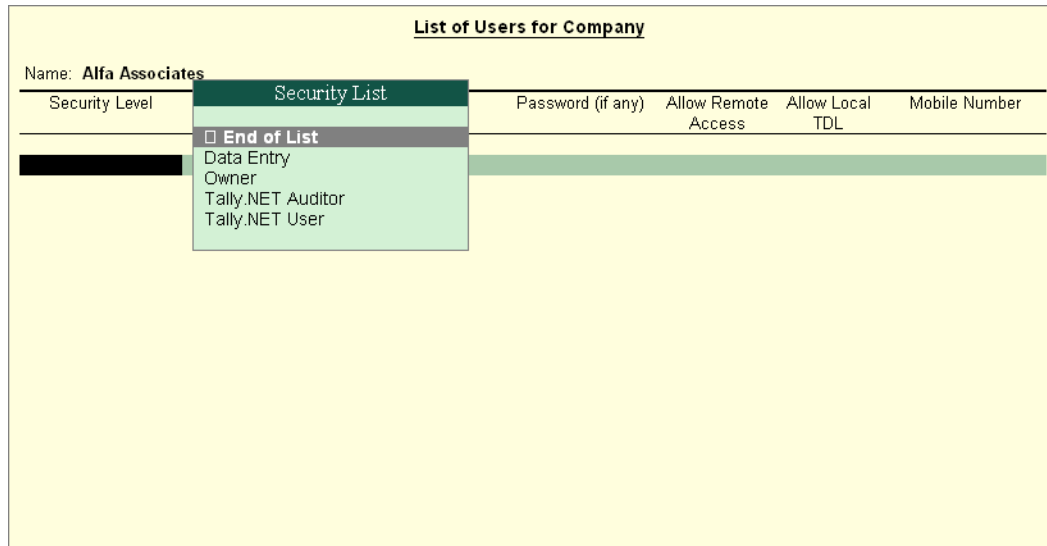


Figure 14.8 List of Users for Company

- ❑ Select **Tally.NET User** from the list of **Security List**.
- ❑ Enter **user@tallysolutions.com** in **Name of User** field.
- ❑ Set **Allow Remote Access** to **Yes**, in order to allow Tally.NET User created earlier to access data from a remote location
- ❑ Set **Allow Local TDLs** to **No** so that the local TDL available in the remote users machine will not be loaded.
- ❑ Enter **9980699332** in **Mobile Number** field.
- ❑ Select **End of List**.

List of Users for Company					
Name: Alfa Associates					
Security Level	Name of User	Password (if any)	Allow Remote Access	Allow Local TDL	Mobile Number
Tally.NET User	user@tallysolutions.com		Yes	No	9980699332

**Accept ?**  
 Yes or No

Figure 14.9 Creation of Users

- Accept to **Authorise the Tally.NET User.**

## 14.6 Remote Access

**Tally.ERP 9** provides remote capabilities to access the data from anywhere. The account administrator can create user id's, authorise and authenticate them to access data remotely.

The Remote users created under the security level **Tally.NET Auditor** or **Tally.NET User** can login, audit and access data from a remote location using another instance of **Tally.ERP 9** running in Licensed or Educational mode.

The data is transferred between the remote location and the server is transferred using a secured mechanism called encryption.

### 14.6.1 Login as Remote User

- Start **Tally.ERP 9** at the remote location

In the **Company Info** screen

- Select **Login as Remote User** or
- Select **Login as Remote Tally.NET User** in the **Startup** screen.

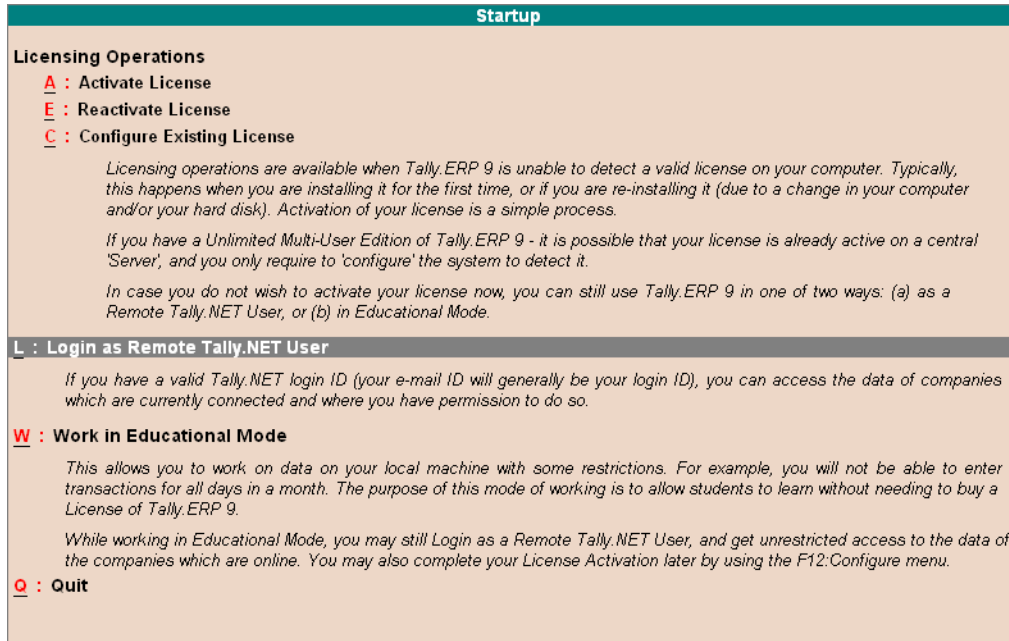


Figure 14.10 Login as Remote Tally.NET User

- Press **Enter**, the **Login As Remote Tally.NET User** screen is displayed.
  - Enter your email address in the **Your Email ID** field.
  - Enter the password in **Your Tally.NET Password** and Press **Enter**.
- The **Select Remote Company** screen is displayed, showing the list of remote companies accessible by the remote user.

List of Remote Companies				
Company Name	Account ID	Serial Number	Contact Person	Contact Number
<b>Online Companies</b>				
ABC Company Ltd	tally1@tallysolutions.com	790003098	Harish Sohani	9902016227
ABC Company Pvt. Ltd.	tally1@tallysolutions.com	780003099	Rajeev	9909968555
Alfa Associates	tally1@tallysolutions.com	790003098	Jacob	9900012345
<b>Offline Companies</b>				
ABC Company Ltd	gururajan.k@tallysolutions.com	763123644	Gururajan K	99020 16187
ABC Company Ltd	tirumulainfobam@sify.com	771063489	Rajesh	9437261304

Figure 14.11 List of Remote Companies

- Select the required company and press **Alt+O** or click **Q:Open** or press **Enter**.
- The **Gateway of Tally** for the selected company appears displaying the **Remote User Details**



*In the **Select Remote Company** screen, the companies that are **Offline** does not appear against the **Company Name** when the company is connected to Tally.NET Servers.*

The screenshot shows the 'Gateway of Tally' window with the following details:

- Current Period:** 1-4-2009 to 31-3-2010
- Current Date:** Wednesday, 31 Mar, 2010
- Remote Company:** Alfa Associates
- Date of Last Entry:** 31-Mar-2010
- Remote User Details:** My Remote ID: :tallymetnormal1@tallysolutions.com; My Remote Login Time: : 29-Jan-2010 05:04:50
- Gateway of Tally Menu:**
  - Masters: Payroll Info.
  - Transactions: Payroll Vouchers
  - Import: Import of Data
  - Reports: Display, Multi Account Printing, Quit

At the bottom, there is a status bar with the following information:

Product	Version	License	Configuration	Calculator
Tally.ERP 9	Series A Latest Release 1.61	Serial Number 790003098 Remote Serial (Multiple) Site ID General 1.52 Account ID tally1@tallysolutions.com	Stat 94 Latest Proxy None	Ctrl + N
	Edition Users Gold Unlimited	Tally.NET subscription valid till 31-Mar-2010	Running as Client without ODBC	

Figure 14.12 Remote Company

To view or print the reports select the required options available.

### Points to Remember

- Tally.NET allows to access Company data Remotely