Lesson 14: Tally.NET and Remote Capabilities

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:
14.3 Connect Company on Tally.NET

To connect the company on Tally.NET,

Go to Gateway of Tally > press F4: Connect.

- 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.
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**
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 Tally.NET User](image)

**Figure 14.4 Login as Tally.NET User**

Press **Enter**

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

![Control Centre](image)

**Figure 14.5 Control Centre**

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

1. 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.

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

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**Figure 14.12** Remote Company
Points to Remember

- Tally.NET allows to access Company data Remotely