

# Remote Access in Tally.ERP9

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## How to Use Remote Access in Tally.ERP9

# THERE ARE THREE OPTIONS TO REMOTELY ACCESS TALLY:

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1. Remote Access in Tally.ERP9 from your Home
2. Access Reports from Remote Access in Tally.ERP9
3. How to Access Tally.ERP9 by way of Reactivation

# 1. Remote Access in Tally.ERP9 from your Home

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- Live business data where you need it, when you need it. Did you know that the Remote Access capability in Tally.ERP 9 lets you access your business data even while you are away from your office?
- Not too long ago, getting an as-it happens picture of your business, and managing data from remote places, was a challenge. However, Remote Access capability—with no location and time limit to access business data—makes managing your business fast and convenient.
- Wherever you are, all you need is a computer with Tally.ERP 9 installed!
- This is made possible by the Tally.NET framework which provides a secure connection through trusted Remote Access. Tally.NET which does not store any data, uses advanced encryption to ensure that it is not accessible to anyone outside the system.

## Requirements to make use of the Remote Access feature in Tally.ERP 9

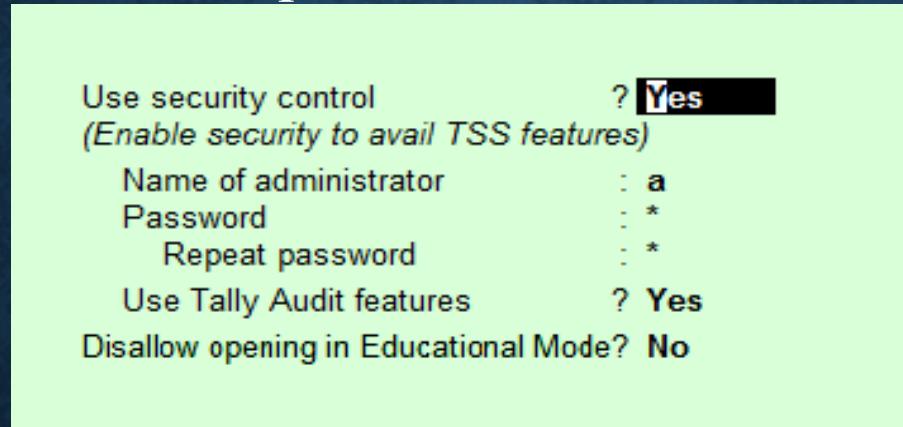
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- You just need a Tally.NET subscription, a computer with Tally.ERP 9 and an Internet connection to make use of the Remote Access feature in Tally.ERP 9.
- You can even use the Educational version of Tally.ERP 9 for remote access.

# To Enable or Configure Remote Access feature in Tally.ERP 9:

## Step:1- Enable Security control in Tally Erp.9:

Go to 'Gateway of Tally > F3: Cmp Info > Alter> Use Security Control > Yes.  
Give name of the administrator and password.



## Step:2- Enable or Configure Remote Access feature in Tally.ERP 9:

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

- Enter 'Contact Person Name' and 'Contact Number'
- Set 'Yes' to 'Allow to Connect Company'
- Set 'Yes' to both 'Enable SMS Access' and 'SMS Company Name'
- Press 'Ctrl+A' to accept the screen

<u>Company: Studycafe</u>	
<u>TSS Features</u>	
<b>Connection Details</b>	
Connect name	: Studycafe
Name of contact person	: Deepak
Contact number	: [REDACTED]
<b>Connectivity Features</b>	
Connect for browser access	? Yes
Connect to Tally.NET Services (for remote access, synchronisation, SMS)	? Yes
Connect company on loading	? No
<b>SMS Access Details</b>	
Enable SMS access	? Yes
Company name for SMS	? Studycafe

### Step:3- Create Remote Users with Different Security Levels

You can use the E-mail ID and password that you have received at the time of registration to log in and create remote users as follows:

Go to <sup>© Deepak Kumar 1816073306</sup>‘Gateway of Tally > F3: Cmp Info> Security Control> Types of Security> Tally.Net Owner

Security Control

Name of security level	:	Tally.NET Owner
Use Basic Facilities of	:	Owner
Days allowed for Back Dated vouchers	:	0
Cut-off date for Back Dated vouchers	:	
Set/Alter rules for Print Before Save (also applicable for Export/E-Mail/Upload)	?	No
Allow to override tax details	?	No
Allow company to connect	?	No
Use Tally.NET Authentication	?	Yes

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Disallow the following Facilities (others will be allowed)	Allow the following Facilities (to re-enable disallowed facilities)
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↑ End of List

↑ End of List

Under Security Control Go to Users and Passwords > Tally.Net Owner use your Email id which was given at the time of purchase of Tally. Enter ‘User’s E-mail ID’ in ‘Name of User’, select ‘Yes’ in ‘Allow Remote Access’

- Set ‘Yes’ or ‘No’ for ‘Allow Local TDL’ and ‘Allow SMS Access’ based on your requirements
- Press ‘Enter’ and accept the screen

List of Users for Company

Name: Studycafe	Security Level	Username / Tally.NET ID	Password (if any)	Allow Browser Access	Allow Remote Access	Allow Local TDL Files
	Tally.NET Owner	[REDACTED]	*	Yes	Yes	No
	Owner	[REDACTED]	*	No	No	No
	Owner	anjali	*	No	No	No
	Owner	amrishi	*	No	No	No

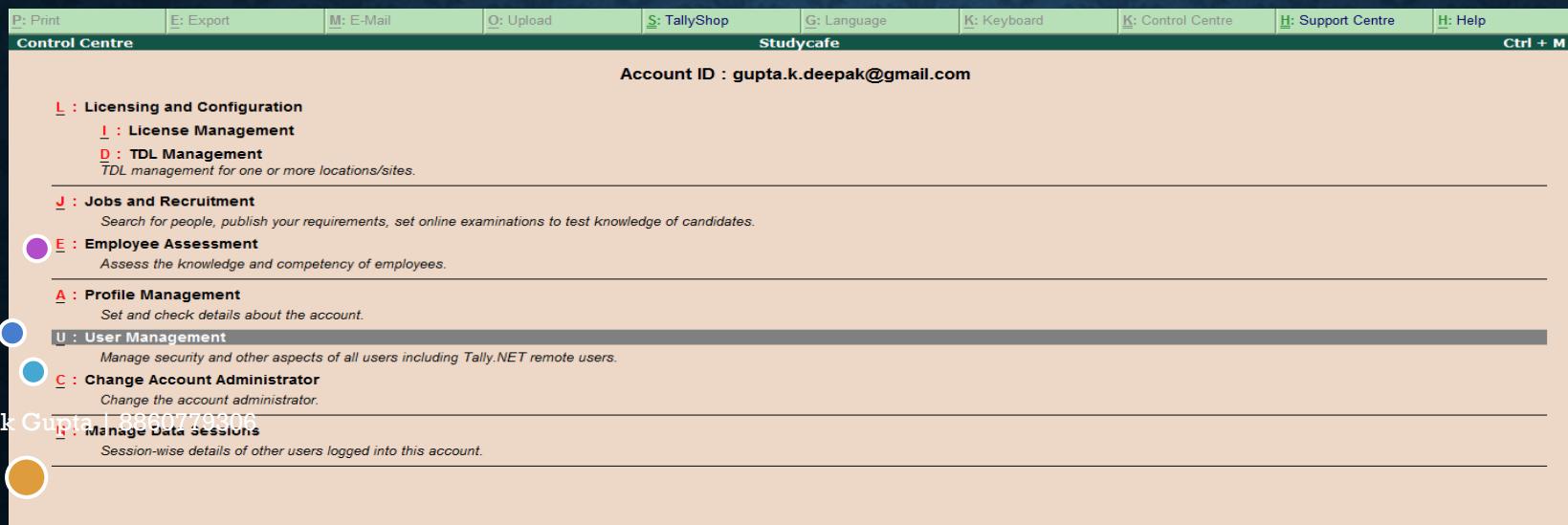
## Step:4- To Create Remote Users with different Security Levels

You can use the E-mail ID and password that you received at the time of registration to log in and create remote users as follows:

- Go to ‘Gateway of Tally >K: Control Centre’
- Enter ‘Your E-Mail ID’ and ‘Your Tally.NET Password’> Press ‘Enter’



- On the Control Centre screen, select ‘User Management’ and press ‘Enter’



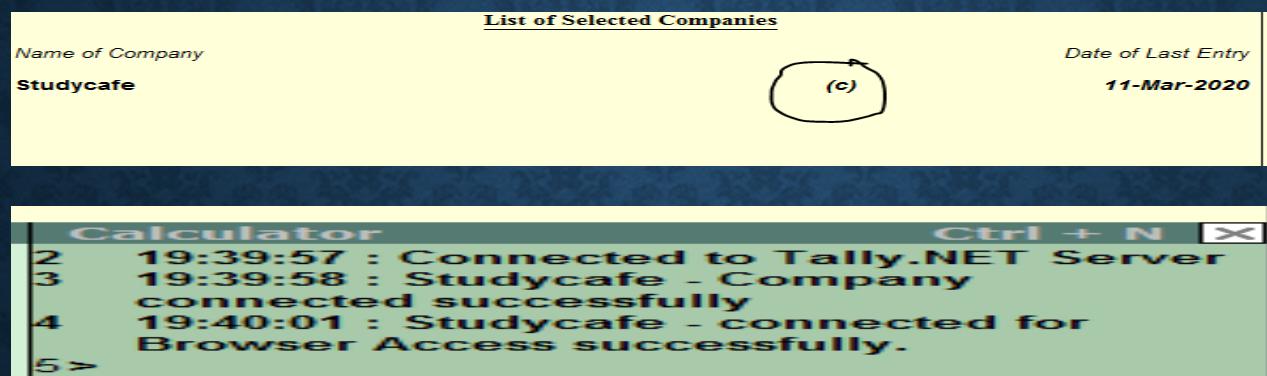
- Select ‘Owner’ from the list of ‘Security Level’
- Enter the required E-mail ID in ‘Tally.NET ID’ and set ‘Yes’ to ‘Tally.NET User’
- Set ‘Status’ to ‘Active’ or set as per your requirement

User Management		Studycafe	
		User Management	
		Account ID : [REDACTED]@gmail.com	
S.No.	Security Level	Tally.NET ID	Tally.NET User Status
1	Owner	[REDACTED]@gmail.com	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> Active

## Step:5-Connecting Company:

To connect the company and making it accessible for remote users Go to ‘Gateway of Tally’ > F4: Connect Company.

Once Connected under list of selected companies ( c ) will appear and in calculator filed at the bottom of the window below message will appear



## Step:6- Login as Remote User After connecting the company

You can log in from a remote location using the steps given below:

- Open Tally.ERP 9 > On the ‘Company Info.’ Screen, select ‘Login as Remote User’
- Enter ‘Tally.NET User ID’ and ‘Tally.NET Password’, press ‘Enter’.
- On the ‘List of Remote Companies’ screen, select the required company listed under ‘Online Companies’ and press ‘Alt+O’ to open or access company’s data.



You can See here under list of Online Remote Companies Studycafe is coming. Which we have just recently created.

Company Name	Account ID	Serial Number	Contact Person	Contact Number	SMS Cmp Name
<b>Online Companies</b>					
Studycafe			Deepak		Studycafe
<b>Offline Companies</b>					
			Deepak Deepak Gupta Deepak		Yes Svc

Tally.ERP 9 offers a seamless experience during remote access with no perceptible lag time. This makes users feel as if the office computer is right in front of them. Now, with enhanced access to their business data, business owners can save time and money and focus more on managing their business.

## 2. Access Tally Reports from Remote Access in Tally.ERP9

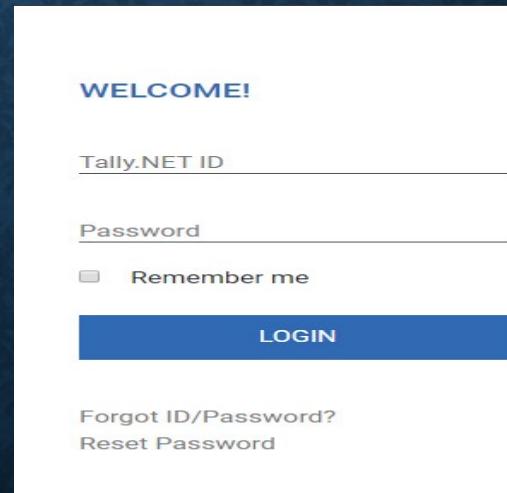
Tally.ERP 9 brings you the ability to view important business reports from a web browser, on any device, anywhere. Grow your business with the utmost secure access to business data even outside your business premises.

You can access important business reports such as Bills Receivable & Payable, Stock Summary, Sales/Purchase Register, Profit & Loss A/C, Balance Sheet and many such reports securely from your web browser. Not just that, you can download an invoice and share with your customers on the go.

If we want to only access Tally Reports such as Bills Receivable & Payable, Stock Summary, Sales/Purchase Register, Profit & Loss A/C, Balance Sheet etc.. same can be accessed from Remote Location if Remote Access setting in Tally.ERP9 has been done.

Remote access Setting we have already done in First Part. Same Setting is required to access reports from Tally.ERP9 Now will only see how to access reports online.

To access Reports online visit <https://tallysolutions.com/> and login with your tally registered email id and password.



After Online you can see connected companies and offline companies. You can see reports only for Connected companies.

Reports					
Select a Company to Proceed					
Only Connected Companies' Reports can be seen					
Search by Company Name or Serial Number	<input type="text"/> <input type="button" value="Q"/>				
Company Name	Connection Status	Serial Number	Company Last Accessed Time	Actions	
SHREE VINAYAK COMPUTER	Connected	[REDACTED]	Just Now	<input checked="" type="checkbox"/>	
Studycafe	Connected	[REDACTED]	A minute ago	<input checked="" type="checkbox"/>	
DEEPAK A GUPTA & CO.	Offline	[REDACTED]	A week ago	<input type="checkbox"/>	<input checked="" type="checkbox"/>
PD GUPTA & CO	Offline	[REDACTED]	--	<input type="checkbox"/>	<input checked="" type="checkbox"/>
ROLLING PIN BAKES - (From 1-Apr-2018)	Offline	[REDACTED]	--	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Click on the connected companies whose report you want to access. Below screen will open showing list of Reports. Access any report which you want to access.

List of Reports	
Select Report	
<input type="text"/> Search here...	
<b>Balance Sheet</b>	
<a href="#">Bills Payable</a>	
<a href="#">Bills Receivable</a>	
<a href="#">Cash/Bank Book(s)</a>	
<a href="#">Cash Flow</a>	
<a href="#">Credit Note Register</a>	
<a href="#">Day Book</a>	
<a href="#">Debit Note Register</a>	
<a href="#">Funds Flow</a>	
<a href="#">Group Outstanding</a>	
<a href="#">Journal Register</a>	
<a href="#">Ledger Outstanding</a>	
<a href="#">Ledger Voucher</a>	
<a href="#">Profit &amp; Loss A/c</a>	
<a href="#">Purchase Register</a>	
<a href="#">Ratio Analysis</a>	
<a href="#">Sales Register</a>	
<a href="#">Stock Query</a>	
<a href="#">Stock Summary</a>	
<a href="#">Trial Balance</a>	

### 3. How to Access Tally.ERP9 by way of Reactivation of license

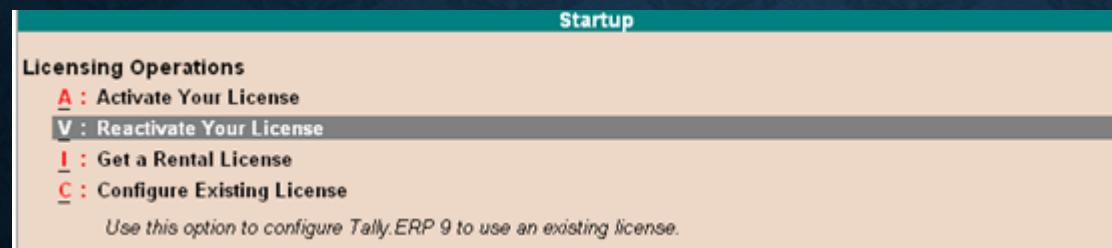
Due to Covid-19 Lockdown you cannot go office and are not able to access your Office Server Computer on which tally was installed and you want to do work from home then you have option to Reactivate your License on your home Laptop/Computer. The Only challenge is that in this option you will not able to get your original tally data.

If you already have your original tally data with you or wants to do work from beginning then this option is viable.

To Reactivate your Tally.ERP 9 license you have to surrendered your existing license it. Reactivation could be for subsequent activation on the same computer or another computer.

1. Start Tally.ERP 9.

2. Click **V** : Reactivate Your License in the Startup screen, as shown below:

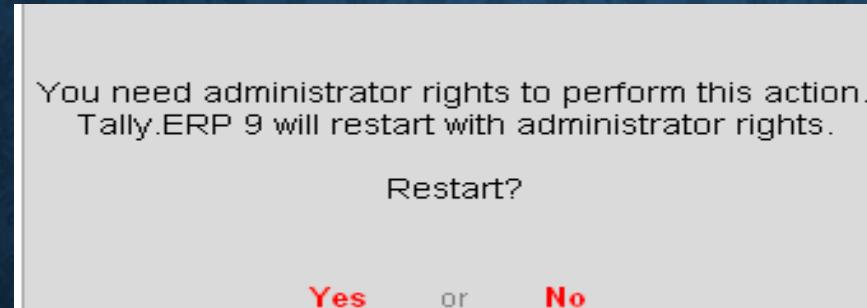


If you are a Microsoft Windows standard user, and do not have the required rights, a message appears as shown below:

You need administrator rights to perform this action.  
Enter administrator Username and Password to restart Tally.ERP 9?

Yes      or      No

3. Click **Yes** , and enter your computer administrator username and password to restart Tally.ERP 9 with administrator rights.
4. If you have Microsoft Windows administrator rights, a message appears as shown below:

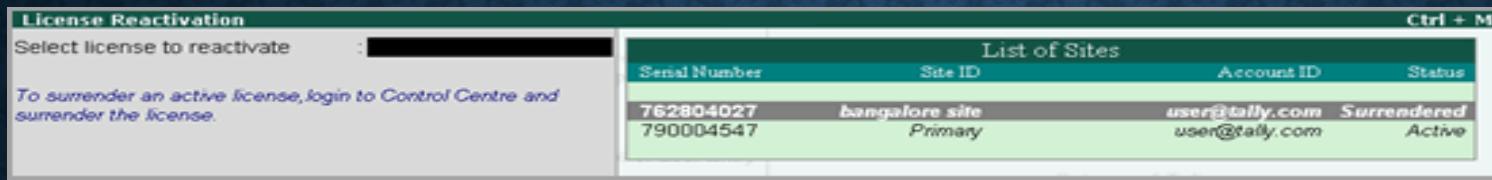


5. Click **Yes** , for Tally.ERP 9 to restart with administrator rights.
6. Enter the Administrator e-mail ID and password in the License Reactivation screen, as shown below:

**Reactivating Your License**

Administrator e-mail ID	:	<b>user@tally.com</b>
<i>If you are reactivating your site license, enter the e-mail ID of your site administrator.</i>		
Tally.NET password	:	*****
<i>Press F5 if you have forgotten your Tally.NET password. You will receive an e-mail with a link to reset your password.</i>		

7. If you are the administrator of more than one site, the **License Reactivation** screen displays a **List of Sites** that can be reactivated, as shown below:



8. Select the license that you want to reactivate.

9. Press **Enter** to reactivate. A confirmation message appears on reactivation of your license.

10. Place your OLD Tally Data in Data Folder and Access Tally.

# Thank You

# Further Discussion - In case of Any Query please discuss on below mentioned Phone or Email id

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