

Remote Access in Tally.ERP9

How to Use Remote Access in Tally.ERP9

THERE ARE THREE OPTIONS TO REMOTELY ACCESS TALLY:

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

- 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.

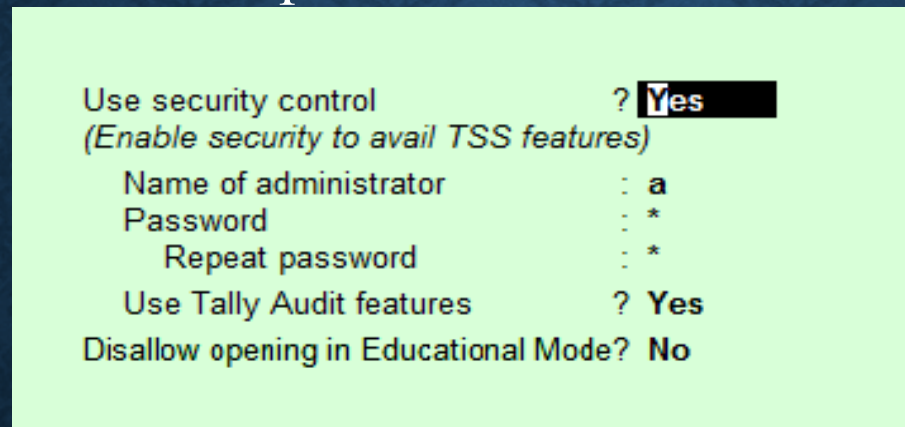
Requirements to make use of the Remote Access feature in Tally.ERP 9

- **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.



Use security control ? **Yes**
(Enable security to avail TSS features)
Name of administrator : a
Password : *
Repeat password : *
Use Tally Audit features ? Yes
Disallow opening in Educational Mode? No

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

Company: Studycafe

TSS Features

Connection Details

Connect name	: Studycafe
Name of contact person	: Deepak
Contact number	:

Connectivity Features

Connect for browser access	? Yes
Connect to Tally.NET Services (for remote access, synchronisation, SMS)	? Yes
Connect company on loading	? No

SMS Access Details

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 'Gateway of Tally > F3: Cmp Info> Security Control> Types of Security> Tally.Net Owner

Security Level

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 ? No
(also applicable for Export/E-Mail/Upload)

Allow to override tax details ? No

Allow company to connect ? No

Use Tally.NET Authentication ? Yes

Disallow the following Facilities
(others will be allowed)

Allow the following Facilities
(to re-enable disallowed facilities)

┘ 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		*	Yes	Yes	No
Owner	anjali	*	No	No	No
Owner	anjali	*	No	No	No
Owner	amrisha	*	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'

11-Mar-2020

Transactions
Accounting Vouchers
Inventory Vouchers

Login as Tally.NET User

Your Tally.NET ID : gupta.k.deepak@gmail.com

Your Tally.NET Password :

Press F5 if you have forgotten your Tally.NET password. You will receive an e-mail with a link to reset your password.

Reports
Balance Sheet
Profit & Loss A/c
Stock Summary
Ratio Analysis

Display
Multi Account Printing

Quit

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

Ctrl + M

Control Centre Studycafe

Account ID : gupta.k.deepak@gmail.com

L : Licensing and Configuration
License Management
TDL Management
TDL management for one or more locations/sites.

J : Jobs and Recruitment
Search for people, publish your requirements, set online examinations to test knowledge of candidates.

E : Employee Assessment
Assess the knowledge and competency of employees.

A : Profile Management
Set and check details about the account.

U : User Management
Manage security and other aspects of all users including Tally.NET remote users.

C : Change Account Administrator
Change the account administrator.

M : Manage Data Sessions
Session-wise details of other users logged into this account.

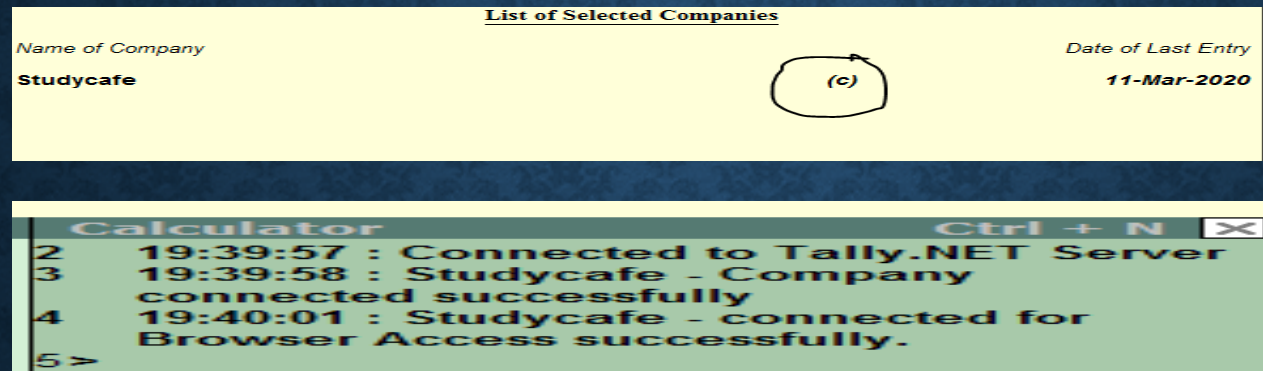
- Select ‘Owner’ from the list of ‘Security Level’
- Enter the required E-mail ID in ‘Tally.NET ID’ and set ‘Yes’ to ‘Tally.NET User’
- Set ‘Status’ to ‘Active’ or set as per your requirement

User Management		Studycafe		
		<u>User Management</u> Account ID : [REDACTED]@gmail.com		
S.No.	Security Level	Tally.NET ID	Tally.NET User	Status
1	Owner	[REDACTED]@gmail.com	Yes	Active

Step:5-Connecting Company:

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

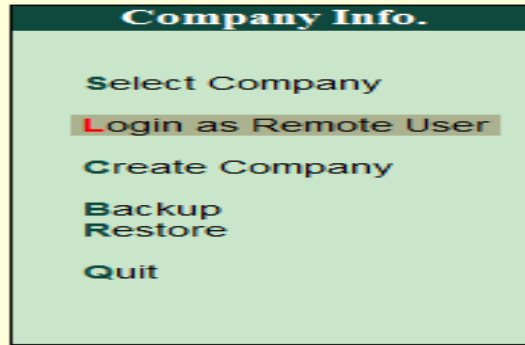
Once Connected under list of selected companies (c) will appear and in calculator filed at the bottom of the window below message will appear



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.

List of Remote Companies					
Company Name	Account ID	Serial Number	Contact Person	Contact Number	SMS Cmp Name
<u>Online Companies</u>					
Studycafe			Deepak		Studycafe
<u>Offline Companies</u>					
			Deepak		Yes
			Deepak Gupta		
			Deepak		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

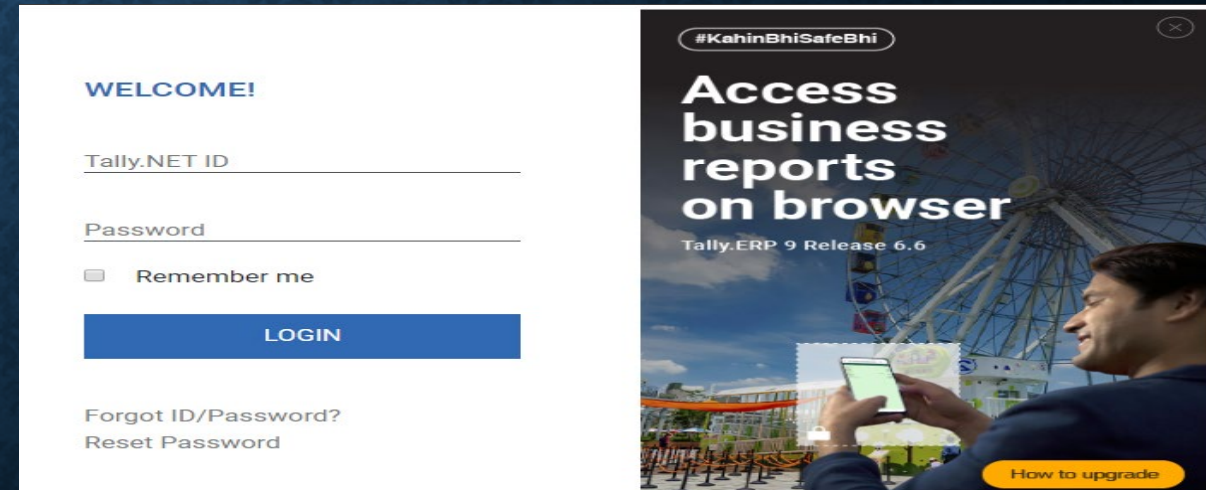
Tally.ERP 9 brings you the ability to view important business reports from a web browser, on any device, anywhere. Grow your business with the utmost secure access to business data even outside your business premises.

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

Company is offline or not listed. [Click here](#) to get help.

Search by Company Name or Serial Number

🔍

Company Name	Connection Status	Serial Number	Company Last Accessed Time	Actions
SHREE VINAYAK COMPUTER	Connected	██████████	Just Now	✔
Studycafe	Connected	██████████	A minute ago	✔
DEEPAK A GUPTA & CO.	Offline	██████████	A week ago	⋮ ✔
PD GUPTA & CO	Offline	██████████	--	⋮ ✔
ROLLING PIN BAKES - (From 1-Apr-2018)	Offline	██████████	--	⋮ ✔

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

Search here..

Select Report

Balance Sheet

Bills Payable

Bills Receivable

Cash/Bank Book(s)

Cash Flow

Credit Note Register

Day Book

Debit Note Register

Funds Flow

Group Outstanding

Journal Register

Ledger Outstanding

Ledger Voucher

Profit & Loss A/c

Purchase Register

Ratio Analysis

Stock Register

Stock Query

Stock Summary

Trial Balance

CA Deepak Gupta | 8860779306

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

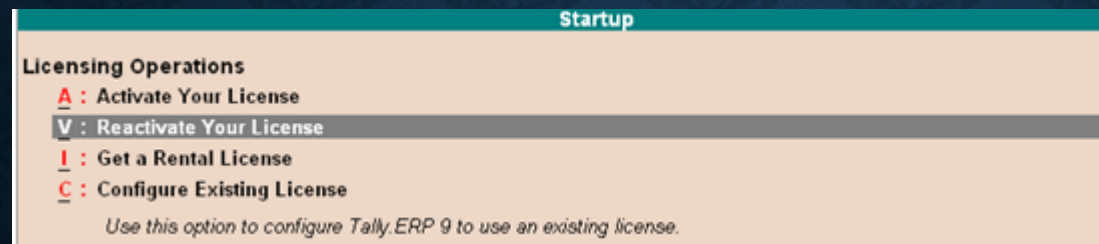
Due to Covid-19 Lockdown you cannot go office and are not able to access your Office Server Computer on which tally was installed and you want to do work from home then you have option to Reactivate your License on your home Laptop/Computer. The Only challenge is that in this option you will not able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



CA Deepak Gupta | 8860779306

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:

You need administrator rights to perform this action.
Tally.ERP 9 will restart with administrator rights.

Restart?

Yes or No

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:

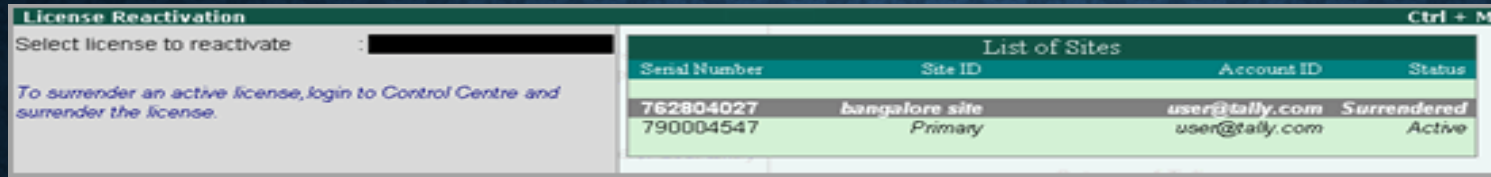
Reactivating Your License

Administrator e-mail ID : user@tally.com
If you are reactivating your site license, enter the e-mail ID of your site administrator.

Tally.NET password :

Press F5 if you have forgotten your Tally.NET password. You will receive an e-mail with a link to reset your password.

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:



The screenshot shows a software window titled "License Reactivation" with a "Ctrl + M" icon in the top right corner. On the left, there is a text field labeled "Select license to reactivate" and a small instruction: "To surrender an active license, login to Control Centre and surrender the license." On the right, there is a table titled "List of Sites".

Serial Number	Site ID	Account ID	Status
762804027	bangalore site	user@tally.com	Surrendered
790004547	Primary	user@tally.com	Active

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**

CA Deepak Gupta

Partner

B.Com, FCA

PD Gupta & Co.

Chartered Accountant

1523, Hemkunt Chambers 89,

Nehru Place

New Delhi-110019

Email: Gupta.k.deepak@gmail.com

Phone: +91-8860779306

Website: <http://www.pdgupta.com/>

