

Remote Access in Tally.ERP9

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.

In addition, you can access Support Center in Tally.ERP 9 to connect with a Tally Expert or solution provider for any clarifications.

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. 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:

- 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

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

Note: You can select 'Delete' or 'In-active' here to remove a previously added user.

User Management				
Spectrum Software Solutions				
Account ID : arun.km@tallysolutions.com				
S.No.	Security Level	Tally.NET ID	Tally.NET User	Status
1	Owner	Owner	Yes	Active
		Standard User		

To Authorise Remote Users and Set Access Rights

For this:

- Go to 'Gateway of Tally > F3: Company Info > Security Controls > Users & Passwords'
- Select 'Tally.NET User' in 'Security Level'
- 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: Spectrum Software Solutions				
Security Level	Security List	Password (if any)	Allow Remote Access	Allow Local TDL Access
	End of List			
	Data Entry			
	Owner			
	Tally.NET Auditor			
	Tally.NET User			

Note: Here you can authorise Tally.NET Auditor to perform remote auditing.

Tally.ERP 9 has great flexibility by offering further option to define security controls as follows:

- Go to 'Gateway of Tally > F3: Company Info > Security Controls > Types of Security

- Select appropriate users 'Security Level' from the list and press 'Enter' to open the 'Security Levels' screen

Security Levels	
Security Levels for Company	
Name: Spectrum Software Solutions	Current Date: 1 Apr, 2011
List of Security Levels	
Data Entry	Date of Last Entry: 31-Aug-2009
Tally.NET User	
Tally.NET Auditor	

Using the facilities provided, you can either allow or restrict users from performing various specific functions as shown below:

Security Levels			
Spectrum Software Solutions			
Name of Security Level	Tally.NET User		
Use Basic Facilities of	Data Entry		
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 Connect Company	No		
Use Tally.NET Authentication	Yes		
Use Tally.NET Auditor Authentication	No		
Disallow the following Facilities (others will be allowed)		Allow the following Facilities (to re-enable disallowed facilities)	
Full Access	Day Book	Full Access	Accounts Masters
Full Access	CST Purchase Register	Full Access	Balance Sheet
Full Access	Back Dated Vouchers	Full Access	Bank Reconciliation
Display	Batch Summary	Display	Cheque Printing
Display	Client/Server Rule	Alter	
Full Access	Bank Books		

Connecting Company

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

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.

P: Print	E: Export	M: E-Mail	U: Upload	G: Language	K: Keyboard	S: Control Centre	IS: Support Centre	H: Help	O: Open Comp
Ctrl + M									
List of Remote Companies									
Current Period									
Current Date									
List of Remote Companies									
Company Name	Account ID	Serial Number	Contact Person	Contact Number	SMS Optline	SMS Suffix			
Online Companies									
ABC Company	tallyuser@tallysolutions.com	7300003086	Rajesh	9900199001	ABCCompany	2			
Offline Companies									
Global Enterprises	tallyuser@tallysolutions.com	7300003086	Rajesh	9900998650					

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.