



POWER OF SIMPLICITY

Getting Started with Data Synchronization in Tally.ERP 9

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Introduction

Data Synchronization refers to a process wherein data is replicated between two or more locations. It enables the branch offices to send data to the head office and vice versa, over the Internet or a private network. Data Synchronization is a two-way process; i.e., all the data pertaining to masters and transactions from the Client company (Branch) are transferred to the Server (Head Office) and all similar data from the Server are copied to the Client.

The computer where Data Synchronization is initiated is termed as the Client and the computer which has the data that is to be synchronized with the Client's data is termed as Server.

Data Sync Changes in Tally.ERP 9

Data Synchronization in Tally.ERP 9 is available as:

- ❑ Sync using Tally.NET Server
- ❑ Sync through Private Network (also referred as Direct/IP Sync)

You can use **Tally.ERP 9 Silver (Single User)** at both the ends to Synchronize data.

Using Tally.NET Server

The process of Data Synchronization using TallyLink Server has been changed in Tally.ERP 9. Going forward Synchronization will be available as a service through the Tally.NET Framework. To use this service, you need a valid Tally.NET subscription and the Tally.ERP 9 Server Company has to be Connected to Tally.NET server at the time of Synchronization.

Using Private Network (Direct /IP Sync)

Direct- Client and Server capability for Synchronization through a private network is incorporated as a default feature of Tally.ERP 9 Series A Release 1.0 onwards. To use this feature you don't have to pay any additional charges.

Lesson 1: Data Synchronization using Tally.NET

Tally.ERP 9 Series A Release 1.0 onwards, Data Synchronization will be available through Tally.NET framework. In the earlier Versions of Tally, Synchronization was done using TallyLink Server. With major technology enhancements in the product, Synchronization will now be available through Tally.NET server.

In the latest framework, it is essential to **connect to Tally.NET at Server end** to Synchronize data across server and client.

Steps for Data Sync using Tally.NET

The Synchronization process using Tally.NET Server consists of the following steps:

- ❑ Configure Server for Synchronization
- ❑ Configure Client for Synchronization
- ❑ Create Sync Rule on Client
- ❑ Configure Tally.NET Features on Server
- ❑ Connect the Server Company to Tally.NET
- ❑ Handshake Process from Client
- ❑ Activate/Enable Sync Rule on Server

Step 1: Configure Server for Synchronization

To configure the Server Company for Synchronization, follow the steps given below:

Go to **Gateway of Tally > F12: Configure > Advanced Configuration**

In the **Advanced Configuration** screen,

- Tab down to **Client/Server Configuration** section,
 - Set the option **Tally is acting as** to **Server**
 - Specify the required port number (**e.g. 9009**) in the **Port** field as shown:

Client/Server Configuration

Tally is acting as	: Server
Enable ODBC Server	? No
Port	: 9009

Tally Sync Configuration

Ignore Client's modified Voucher Type Masters ? **No**
Enable Sync Logging (SockReq.log) ? **No**

Proxy Configuration

Use HTTP Proxy Server ? **No**

Figure 1.1 Configuring Tally.ERP 9 as Server



- *Tally.ERP 9 will use the above configured Port for Data Synchronization. This has nothing to do with the Licensing Port. By default Tally.ERP 9 will use port 9000 for Data Synchronization and ODBC.*
- *You can also set the above parameters using **Tally.ini** file also.*

- Tab down to **Tally Sync Configuration** section:
 - Set the option **Ignore Clients modified Voucher Type Masters** to **No**
 - Set the option **Enable Sync Logging** to **Yes**
 - Set the option **Truncate previous log before Syncing** to **Yes**



- ❑ **Ignore Client's modified Voucher Type Masters** should be set to **No**, so that modifications made to Voucher Type Masters on the Client are updated on the Server.
- ❑ **Enable Sync Logging** should be set to **Yes**, to generate a Log file which contains synchronized vouchers and is saved in the Tally folder.
- ❑ **Truncate previous log before Syncing** should be set to **Yes**, to allow the previous log file to be overwritten by the current log file.

Client/Server Configuration

Tally is acting as : **Server**
 Enable ODBC Server ? **No**
 Port : **9009**

Tally Sync Configuration

Ignore Client's modified Voucher Type Masters ? **No**
 Enable Sync Logging (SockReq.log) ? **Yes**
 Truncate previous log before Syncing ? **Yes**

Proxy Configuration

Use HTTP Proxy Server ? **No**

Accept ?
Yes or No

Figure 1.2 Tally Sync Configuration screen - Server Computer

- Go to end and press **Enter** to save the details.

For the above changes to take effect, Tally.ERP 9 will prompt you to restart the application as shown:

**Do you want to restart Tally.ERP 9
for the changes to have effect ?**

Yes or No

Figure 1.3 Restart Tally.ERP 9 dialogue box

- Press **Enter** or select **Yes** to restart Tally.ERP 9 on the server computer.

The Tally.ERP 9 is Configured as the Sync Server as shown in the Information panel.

Product	Version	License	Configuration	Calculator	Ctrl + N
Tally POWER OF SIMPLICITY Tally.ERP 9	Series A Release 1 (Beta) Edition Users	Latest Latest Gold Unlimited	Serial Number 702088209 Site ID Primary Account ID tally1@tallysolutions.com Tally.NET subscription valid till 23-May-2009 Server Port 9009 Running as Server without ODBC	Stat 81 Latest	

Figure 1.4 Tally.ERP 9 configured as Sync Server

Step 2: Configure Client for Synchronization

To configure the Client Company for Synchronization, follow the steps given below:

Go to **Gateway of Tally > F12: Configure > Advanced Configuration**

In the **Advanced Configuration** screen,

- Tab down to **Client/Server Configuration** section,
 - Set the option **Tally is acting as** to **Client**

Client/Server Configuration		Client / Server
Tally is acting as	: Client	Both
Enable ODBC Server	? No	Client
Port	: 9000	None
		Server
Tally Sync Configuration		
Ignore Server's modified Voucher Type Masters ?	No	
Proxy Configuration		
Use HTTP Proxy Server ?	No	

Figure 1.5 Configuring Tally.ERP 9 as Client



You can also set the above parameters using **Tally.ini** file also.

- Tab down to **Tally Sync Configuration** section,
 - Set the option **Ignore Servers modified Voucher Type Masters** to **No**

Client/Server Configuration

Tally is acting as : **Client**
 Enable ODBC Server ? **No**
 Port : **9000**

Tally Sync Configuration

Ignore Server's modified Voucher Type Masters ? **No**

Proxy Configuration

Use HTTP Proxy Server ? **No**

Accept ?
 Yes or No

Figure 1.6 F12: Tally Sync Configuration screen- Client Computer

- Go to end and press **Enter** to save the details

For the above changes to take effect, Tally.ERP 9 will prompt you to restart the application.

- Press **Enter** or select **Yes** to restart Tally.ERP 9 on the Client computer

Product	Version	License	Configuration	Calculator
Tally POWER OF SIMPLICITY Tally.ERP 9	Series A Release 1 (Beta) Edition Users	Latest Latest Gold Unlimited	Serial Number 702088209 Site ID Primary Account ID tally1@tallysolutions.com Tally.NET subscription valid till 28-May-2009	Stat 81 Latest Running as Client without ODBC

Figure 1.7 Tally.ERP 9 configured as Sync Client

The Tally.ERP 9 is Configured as the Sync Client as shown in the Information panel.

Step 3: Create Sync Rule on Client

On the Client Computer,

- Select the Company for which the data needs to be synchronized
Go to **Gateway of Tally > Import of Data > Synchronization > Client Rules > Create**

In the **Client Rule Creation** screen,

- Enter **Sync with HO** in the **Name of Rule** field
- Set **Use Tally.NET Server** to **Yes**
- Enter the **Account ID** for the Server in the **Server Account Id** field
- **Synchronize** is selected in **Type of Rule** field by default
- Enter **Server Company** in the **Company Name on Server** field
- Select **Yes** for **Synchronize Altered Transactions**
- Select **Yes** for **Sync over slow connection**

Name of Rule	: Sync with HO	Type of Rule	: Synchronize
Use Tally.NET Server	? Yes	Company Name on Server	: Server Company
Server Account Id	: Tally1@tallysolutions.Com	(Connect Name of Company on Server)	
		Synchronize Altered Transactions	? Yes
		Sync over slow connection	? Yes
		Company GUID on Server	:
		Current TID	: 0
		Altered TID	: 0
		Is Active	: No
		Remote Alter State	: No
			Accept ?
			Yes or No

Figure 1.8 Client Rule Creation screen

- Press **Enter** to save the **Client Rule Creation** screen



*The **Company Name on Server** should be the **Connect Name** for the Server Company in the above screen.*

Step 4: Configure Tally.NET Features on Server

On Server Computer,

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

In the **Tally.NET Features** screen,

- Enter **Server Company** as **Connect Name**
- Enter the required name in the **Contact Person Name** field
- Enter the required phone/mobile number in the **Contact Number** field
- Select **Yes** for **Allow to Connect Company**
- Select **Yes** for **Connect on Load**

Company: Server Company

Tally.NET Features

Registration Details

Connect Name	: Server Company
Contact Person Name	: Rajesh
Contact Number	: 9900776644

Connect for Remote Access

Allow to Connect Company	? Yes
Connect on Load	? Yes

Accept ?

F1: Accounts
F2: Inventory
F3: Statutory
F4: Tally.NET
F5: Audit

Yes or No

Figure 1.9 Tally.NET Features – Server Company

- **Accept** to save



*It is mandatory to enable **Security Controls** in Company Creation master for **Tally.NET** features to be available in Tally.ERP 9. If Security Controls feature is not enabled, go to **Company Alteration (Alt+F3)** screen and enable the same for proceeding further.*



- ❑ **Connect Name:** The user can specify any Connect Name for the Company to be connected as per his requirements.
- ❑ **Allow to Connect Company:** This option allows you to enable the Company to get connected for remote access. (For Data Synchronization the Server Company should be connected to Tally.NET server)
- ❑ **Connect on Load:** This allows the company to get connected by default when the company is loaded. If this option is set to No, then you can connect the Company using F4: Connect button from Gateway of Tally also.

Step 5: Connect the Server Company to Tally.NET

On Server Computer,

Go to **Gateway of Tally > Press F4 (or click on F4: Connect Cmp)**

In the **Connect Companies To Tally.NET** screen,

- ❑ Select the required Company to be connected for Synchronization using **Tally.NET** from the **List of Companies**.

Connect Companies to Tally.NET		Server Company	
Connect Companies to Tally.NET			
Connect Name	Company Name	Contact Person	Contact Number
Server Company	Server Company	Rajesh	9900776644

Accept ?

Yes or **No**

Figure 1.10 Tally.NET Connect Company screen

- Press **Enter** to **Connect** the Company



The **Connect Companies to Tally.NET** screen does not appear when there is a single company loaded. In this case, the loaded company directly Connects to Tally.NET when you click on **F4: Connect Cmp** or press **F4**.

on Successful connection, the **Connection Status** is displayed in the **Calculator Panel**.

The screenshot shows the 'Gateway of Tally' window. On the left, it displays 'Current Period: 1-4-2008 to 31-3-2009' and 'Current Date: Tuesday, 1 Apr, 2008'. Below this is a 'List of Selected Companies' table with one entry: 'Server Company' with 'Date of Last Entry' as '1-Apr-2008'. On the right, a smaller 'Gateway of Tally' window is shown with a menu including Masters (Accounts Info, Inventory Info), Transactions (Accounting Vouchers, Inventory Vouchers), Import (Import of Data), Reports (Balance Sheet, Profit & Loss A/c, Stock Summary, Ratio Analysis), Display (Multi Account Printing), and Quit. At the bottom, a status bar shows '* (c) Connected to Tally.NET'.

Product	Version	License	Configuration	Calculator
Tally POWER OF SIMPLICITY Tally.ERP 9	Series A Release 1 (Beta) Edition Users	Latest Latest Gold Unlimited Tally.NET subscription valid till 23-May-2009	Serial Number 702088209 Site ID Primary Account ID tally1@tallysolutions.com Server Port 9009 Running as Server without ODBC	Ctrl + N 1 15:57:38 : Connected to Tally.NET 2 15:57:47 : Server Company - Company connected successfully 3>

Figure 1.11 Company Connection status message

- Click inside the **Calculator Panel** to Maximize the same

The screenshot shows the 'Calculator' panel, which is maximized. It displays the same connection status messages as Figure 1.11: '1 15:57:38 : Connected to Tally.NET' and '2 15:57:47 : Server Company - Company connected successfully'. The panel also shows the 'Product' section with 'Tally.ERP 9'.

Product	Calculator
Tally POWER OF SIMPLICITY Tally.ERP 9	Ctrl + N 1 15:57:38 : Connected to Tally.NET 2 15:57:47 : Server Company - Company connected successfully 3>

Figure 1.12 Company Connection status - maximized



You can press on **Escape** Key to minimize the **Calculator Panel**.

Step 6: Hand Shake Process from Client

Go to **Gateway of Tally > Import of Data > Synchronization > Synchronize**

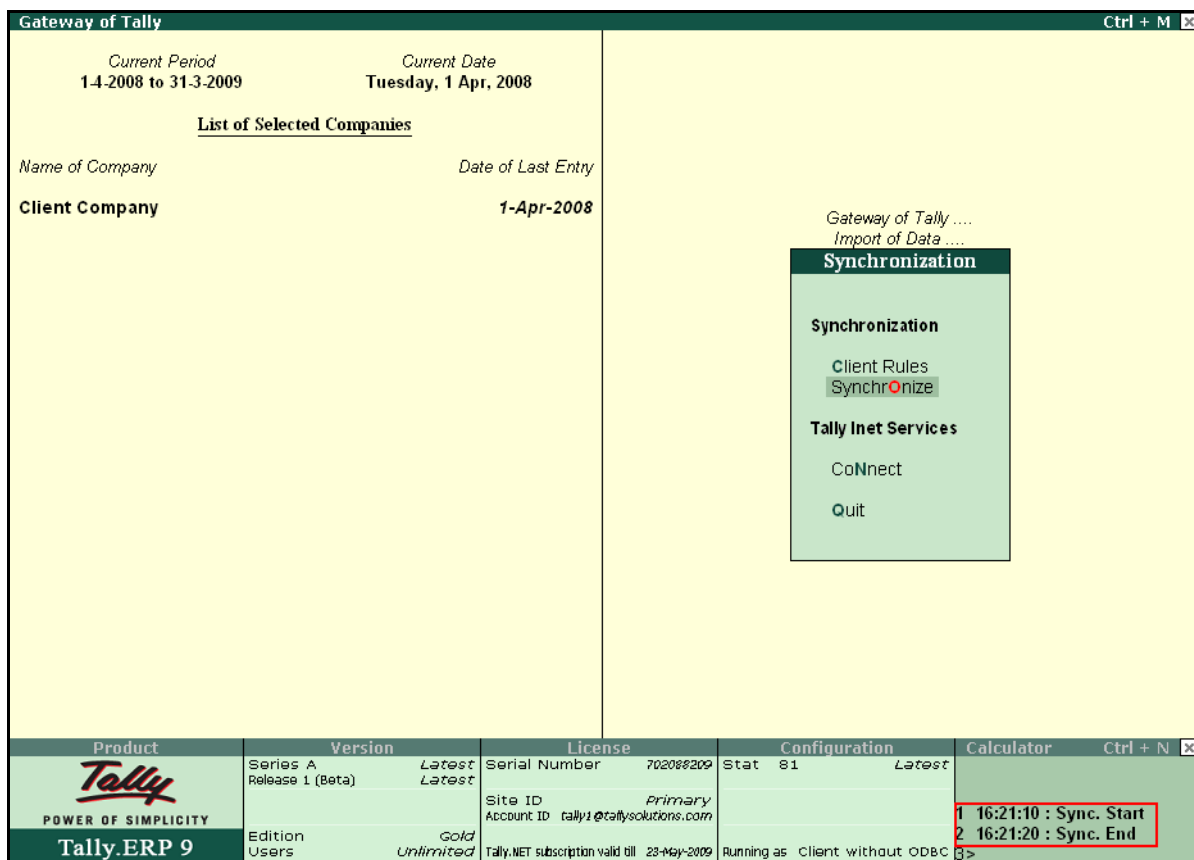


Figure 1.13 Handshake Process from Client

The Synchronization status is displayed in the **Calculator panel**.

Step 7: Activate/Enable Sync Rule on Server

Go to **Gateway of Tally > Import of Data > Synchronization > Server Rules > Activate**

- ❑ Select the required rule from the **List of Rules** based on the **Client Company Name** as shown:

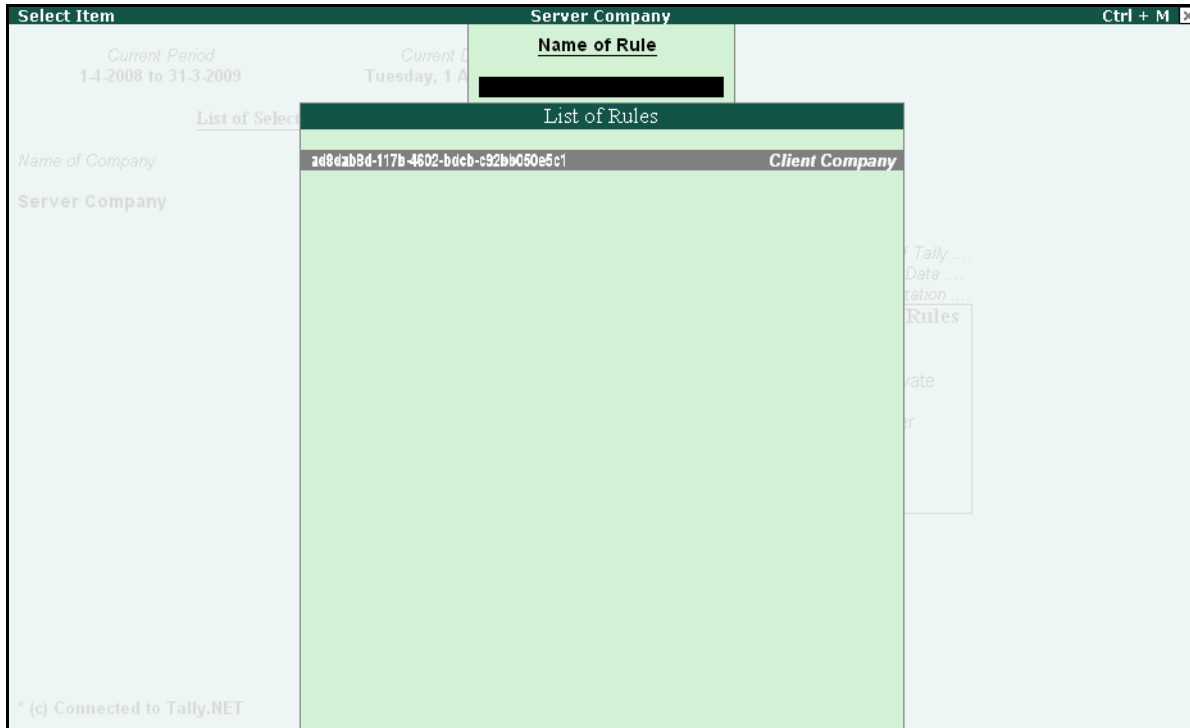


Figure 1.14 Server Rule Selection screen

- ❑ Press **Enter** to select the Rule
- ❑ In the **Server Rule Activation** screen,
 - Select **Is Active** to **Yes** to activate the Rule
 - Select **Yes** for **Synchronized Altered Transactions**

Name of Rule	: Ad8dab8d-117b-4602-Bdcb-C92bb050e5c1
Company Name on Client	: Client Company
Is Active	: Yes
Synchronize Altered Transactions ?	: Yes
Current TID	: 0
Altered TID	: 0
Remote Alter State	: Yes

Accept ?
 Yes or No

Figure 1.15 Server Rule Alteration screen

You can continue using the Synchronization once Server Rule is activated.

To Start the Sync, on the Client Computer:

Go to **Gateway of Tally > Import of Data > Synchronization > Synchronize**

After Data Synchronization is completed, **Client** displays the status in the Calculator Panel as shown:

Product	Version	License	Configuration	Calculator
Tally POWER OF SIMPLICITY	Series A Release 1 (Beta)	Serial Number 702088209 Site ID Account ID tally1@tallysolutions.com	Stat 81 Latest	1 16:21:10 : Sync. Start 2 16:21:20 : Sync. End 3 16:23:53 : Sync. Start 4 16:24:04 : Sync. End 5 >
Tally.ERP 9	Edition Users	Gold Unlimited Tally.NET subscription valid till 23-May-2009	Running as Client without ODBC	

Figure 1.16 Sync success message on Client

Lesson 2: Sync through Private Network (Direct/IP Sync)

From Tally.ERP 9 Series A Release 1.0 onwards, the **Direct - Client and Direct Server** capability for Synchronization through private network (also referred as IP Sync) is a default feature available in the product. To use this feature, you don't have to pay any additional charges. The process for Data Synchronization remains the same while doing the Sync using Direct – Client and Server capability (or IP Sync).

Steps for Data Sync using IP Sync

The steps for IP Sync are as follows:

- ❑ Configure Server for Synchronization
- ❑ Configure Client for Synchronization
- ❑ Create Sync Rule on Client
- ❑ Handshake Process from Client
- ❑ Activate/Enable Sync Rule on Server

Step 1: Configure Server for Synchronization

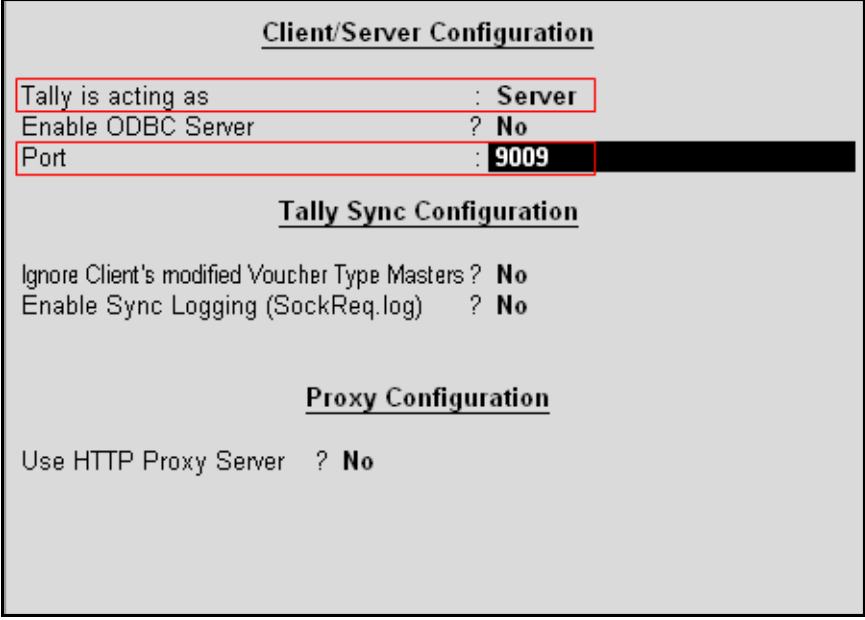
To configure the Server Company for Synchronization, follow the steps given below:

Go to **Gateway of Tally > F12: Configure > Advanced Configuration**

In the **Advanced Configuration** screen,

- ❑ Tab down to **Client/Server Configuration** section,
 - Set the option **Tally is acting as** to **Server**

- Specify the required port number (e.g. 9009) in the **Port** field as shown:



Client/Server Configuration

Tally is acting as : **Server**

Enable ODBC Server ? **No**

Port : **9009**

Tally Sync Configuration

Ignore Client's modified Voucher Type Masters ? **No**

Enable Sync Logging (SockReq.log) ? **No**

Proxy Configuration

Use HTTP Proxy Server ? **No**

Figure 2.1 Configuring Tally.ERP 9 as Server



- *Tally.ERP 9 will use the above configured Port for Data Synchronization. This has nothing to do with the Licensing Port. By default Tally.ERP 9 will use port 9000 for Data Synchronization and ODBC.*

- *You can also set the above parameters using **Tally.ini** file*

□ **Sync Configuration on Server:**

- Set the option **Ignore Clients modified Voucher Type Masters** to **No**
- Set the option **Enable Sync Logging** to **Yes**
- Set the option **Truncate previous log before Syncing** to **Yes**



- *Ignore Client's modified Voucher Type Masters should be set to **No**, so that modifications made on the Client to Voucher Type Masters are updated on the Server.*
- *Enable Sync Logging should be set to **Yes**, to generate a Log file which contains synchronized vouchers and is saved in the Tally folder.*
- *Truncate previous log before Syncing should be set to **Yes**, to allow the previous log file to be overwritten by the current log file.*

Client/Server Configuration

Tally is acting as : **Server**
Enable ODBC Server ? **No**
Port : **9009**

Tally Sync Configuration

Ignore Client's modified Voucher Type Masters ? **No**
Enable Sync Logging (SockReq.log) ? **Yes**
Truncate previous log before Syncing ? **Yes**

Proxy Configuration

Use HTTP Proxy Server ? **No**

Accept ?
Yes or **No**

Figure 2.2 Tally Sync Configuration screen - Server Computer

- Go to end and press **Enter** to save the details.

For the above changes to take effect, Tally.ERP 9 will prompt you to restart the application as shown:

**Do you want to restart Tally.ERP 9
for the changes to have effect ?**

Yes or **No**

Figure 2.3 Restart Tally.ERP 9 dialogue box

- Press **Enter** or select **Yes** to restart Tally.ERP 9 on the server computer

Product	Version	License	Configuration	Calculator
Tally POWER OF SIMPLICITY Tally.ERP 9	Series A Release 1 (Beta) Edition Users	Latest Latest Gold Unlimited	Serial Number 702088209 Stat 81 Latest Site ID Account ID tally1@tallysolutions.com Primary Server Port 9009 Running as Server without ODBC	Ctrl + N

Figure 2.4 Tally.ERP 9 Configured as Sync Server

The Tally.ERP 9 is Configured as the Sync Server as shown in the Information panel.

Step 2: Configure Client for Synchronization

To configure the Client Company for Synchronization, follow the steps given below:

Go to **Gateway of Tally > F12: Configure > Advanced Configuration**

In the **Advanced Configuration** screen,

- Tab down to **Client/Server Configuration** section,
 - Set the option **Tally is acting as** to **Client**

Client/Server Configuration		Client / Server
Tally is acting as	: Client	Both
Enable ODBC Server	? No	Client
Port	: 9000	None
		Server
Tally Sync Configuration		
Ignore Server's modified Voucher Type Masters ?	No	
Proxy Configuration		
Use HTTP Proxy Server ?	No	

Figure 2.5 Configuring Tally.ERP 9 as Client



You can also set the above parameters using the **Tally.ini** file

- Tab down to **Tally Sync Configuration** section,
 - Set the option **Ignore Servers modified Voucher Type Masters** to **No**

Client/Server Configuration

Tally is acting as : **Client**
 Enable ODBC Server ? **No**
 Port : **9000**

Tally Sync Configuration

Ignore Server's modified Voucher Type Masters ? **No**

Proxy Configuration

Use HTTP Proxy Server ? **No**

Accept ?
 Yes or No

Figure 2.6 F12: Tally Sync Configuration screen- Client Computer

- Go to end and press **Enter** to save the details

For the above changes to take effect, Tally.ERP 9 will prompt you to restart the application.

- Press **Enter** or select **Yes** to restart Tally.ERP 9 on the Client computer

Product	Version	License	Configuration	Calculator	Ctrl + N
Tally POWER OF SIMPLICITY Tally.ERP 9	Series A Release 1 (Beta) Edition Users	Latest Latest Gold Unlimited	Serial Number 702088209 Site ID Primary Account ID tallyz@tallysolutions.com Tally.NET subscription valid till 23-May-2009	Stat 81 Latest Running as Client without ODBC	

Figure 2.7 Tally.ERP 9 configured as Sync Client

The Tally.ERP 9 is Configured as the Sync Client as shown in the Information panel.

Step 3: Create Sync Rule on Client

- Select the Company for which the data needs to be synchronized

Go to **Gateway of Tally > Import of Data > Synchronization > Client Rules > Create**

In the **Client Rule Creation** screen,

- Enter required Sync rule name (e.g. **Sync with HO**) in the **Name of Rule** field
- Set **Use Tally.NET Server** to **No** (By default it will be set to **No**)
- Enter the **Static IP Address** of the server in the **Server URL** field along with the Port Number (e.g. **192.168.5.137:9009**).
- Set **Secure Server** to **Yes** or **No** depending on whether the Server Computer is listening in the Secure mode or not.
- **Username** and **Password** should be provided when **Set Secure Server** option is enabled.
- **Use Compression** should be set to **Yes** if you want to compress the data during the Sync process. This will help to speed up the Sync process.
- Select **Synchronize** in the **Type of Rule** field.
- Enter **Server Company** in the **Company Name on Server** field.
- Select **Yes** for **Synchronize Altered Transactions**.
- Select **Yes** for **Sync over slow connection**, in case if your Internet speed is slow.

Name of Rule	: Sync with HO	Type of Rule	: Synchronize
Use Tally.NET Server	? No	Company Name on Server	: Server Company
Server URL	: 192.168.5.137:9009	(Connect Name of Company on Server)	
Secure Server	? No	Synchronize Altered Transactions	? Yes
User Name	:	Sync over slow connection	? Yes
Password	:		
Use Compression	? No	Company GUID on Server	:
		Current TID	: 0
		Altered TID	: 0
		Is Active	: No
		Remote Alter State	: No
		Accept ?	
		Yes or No	

Figure 2.8 Client Rule Creation screen

- Press **Enter** to save the **Client Rule Creation** screen.

Step 4: Handshake Process from Client

Go to **Gateway of Tally > Import of Data > Synchronization > Synchronize**

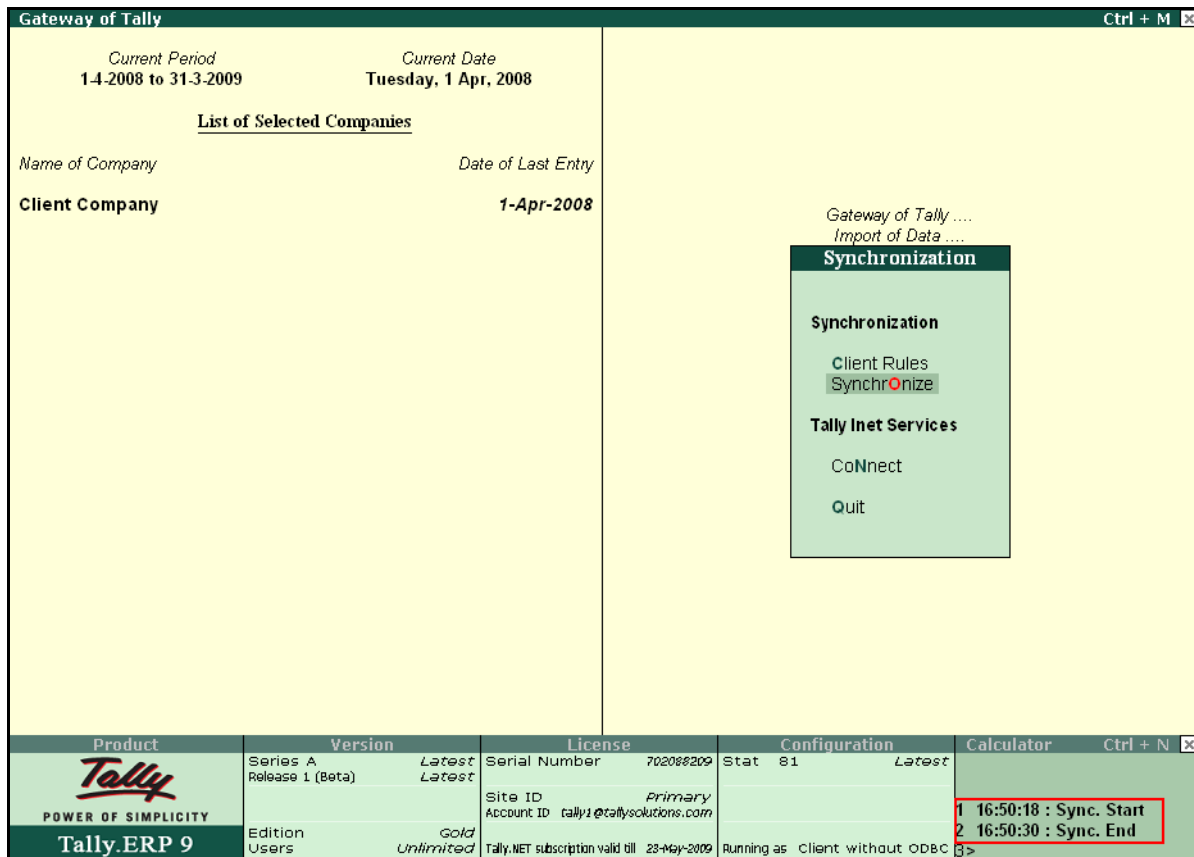


Figure 2.9 Handshake Process from Client

The Synchronization status is displayed in the Calculator panel.

Step 5: Activate/Enable Sync Rule on Server

Go to **Gateway of Tally > Import of Data > Synchronization > Server Rules > Activate**

- ❑ Select the required rule from the **List of Rules** based on the **Client Company Name** as shown:

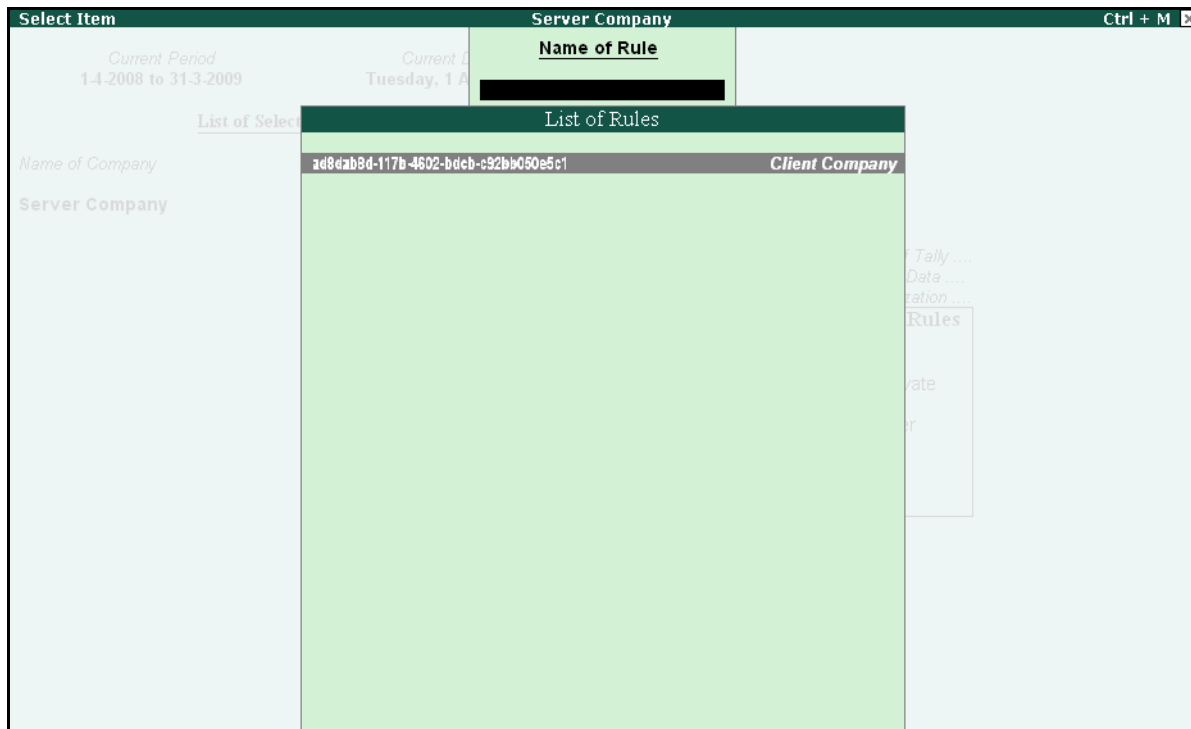


Figure 2.10 Server Rule Selection screen

- ❑ Press **Enter** to select the Rule
- ❑ In the **Server Rule Activation** screen,
 - Select **Is Active** to **Yes** to activate the Rule
 - Select **Yes** for **Synchronized Altered Transactions**

Name of Rule	: Ad8dab8d-117b-4602-Bdcb-C92bb050e5c1
Company Name on Client	: Client Company
Is Active	: Yes
Synchronize Altered Transactions ?	: Yes
Current TID	: 0
Altered TID	: 0
Remote Alter State	: Yes

Accept ?
 Yes or No

Figure 2.11 Server Rule Alteration screen

- Select **Yes** to activate the Server Rule

You can continue using the Synchronization, once the Server rule is activated.

To Start the Sync, on the Client Computer:

Go to **Gateway of Tally > Import of Data > Synchronization > Synchronize**

After Data Synchronization is completed, **Client** displays the status in the calculator panel as shown:

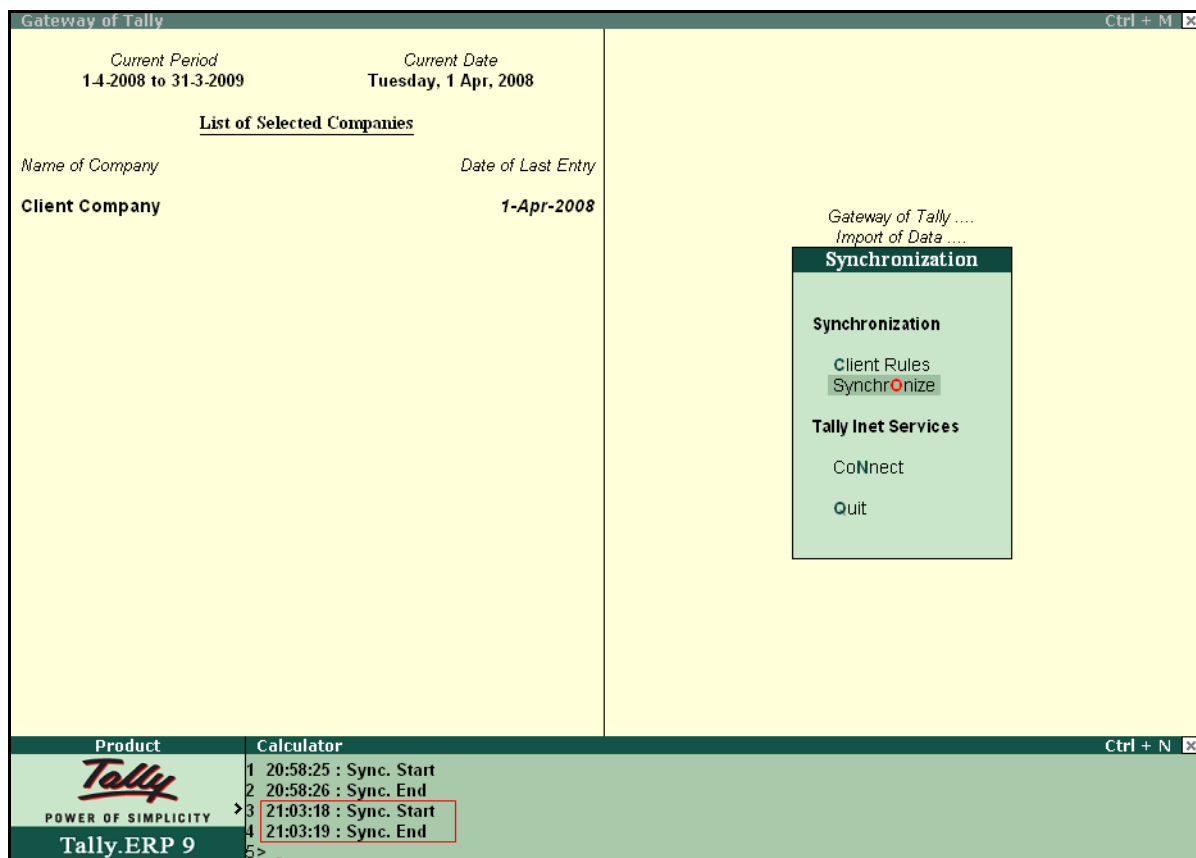


Figure 2.12 Sync success message on Client