



Installation Manual

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1 About this Manual

This document contains information and a step-by-step guide on how to download, install, and configure the SmartenApps for Tally®

1.1 Scope and Organization of Topic Areas

The content in this manual is organized according to the steps performed in downloading and installing the SmartenApps for Tally® on mobile and it's Desktop App and is arranged by the following topics:

Chapter 2	Installation Prerequisites
Chapter 3	Installation Overview
Chapter 4	Installing the SmartenApps for Tally®
Chapter 5	Installing the Desktop App - SmartenApps for Tally®
Chapter 6	Product & Support Information

1.2 Conventions used

This manual uses typographical conventions in the text to help you distinguish between the names of files, instructions, and other important notes that are relevant during installation. For example:

- Field names are shown in boldface font:
Select the **Page Setup** tab under **Page Header/Footer Configuration**.
- Important notes are indicated in blue:

Note:

The machine on which the Desktop App - SmartenApps for Tally® has to be installed should be connected to the Internet to push data from the Tally application to the secure cloud server.

- References to **other Manuals** are mentioned in highlights

Reference: **Installation Manual > Select Companies**

2 Installation Prerequisites

Below are prerequisites to access your SmartenApps for Tally® mobile and desktop app:

- SmartenApps for Tally® mobile app: Smart phone running Apple - iOS 8.x and above or Android - 6.x and above.
- SmartenApps for Tally® Desktop App: You need an Internet connection from the machine on which the Desktop App has to be installed so that the Desktop App can get connected to the Tally machine to push data from Tally application to the cloud server. Desktop App can be installed on any windows machine running window 10 or higher.
- Compatible Browser Versions for Web Portal Access
Web Browser (Latest two versions) - Chrome, Firefox, Safari, Edge
- Although it is not mandatory, the Desktop App should preferably be installed on the same machine that the Tally application is running.
- Compatible Tally version
Tally ERP 9 - release 5 and above
Tally Prime – You need to enable connectivity by going into:
Exchange -> Data Synchronization – Client / Server Configuration
OR
Help – Setting – Connectivity –Client / Server Configuration

3 Installation Overview

Shown below are the broad steps you need to follow in sequence for successful installation.

1. Access SmartenApps for Tally® on your mobile device from respective app stores or access web version from <https://www.smartenapps.com/tallyerp/> .
2. Register through the Web or Mobile App.
3. Download and Install the Desktop App - SmartenApps for Tally® on your Desktop.
 - 3.1. Log in to the Desktop App - SmartenApps for Tally®.
 - 3.2. Configure the Desktop App - SmartenApps for Tally®.
 - 3.3. Extract Tally® data using Desktop App – SmartenApps for Tally®.

4 Access SmartenApps for Tally®

There are two ways through which you can access SmartenApps for Tally®.

SmartenApps for Tally Mobile App

You can download and install the SmartenApps for Tally® mobile app on your mobile device to view and access required Tally data, reports, and graphs. The App supports both Android and Apple devices.

You can download the SmartenApps for Tally® mobile app from respective App stores. You can search on your app store (“Play Store” for Android smartphones and “App Store” for Apple smartphones).

You can also visit our website <https://www.smartenapps.com/tallyerp/> for download links and other information.

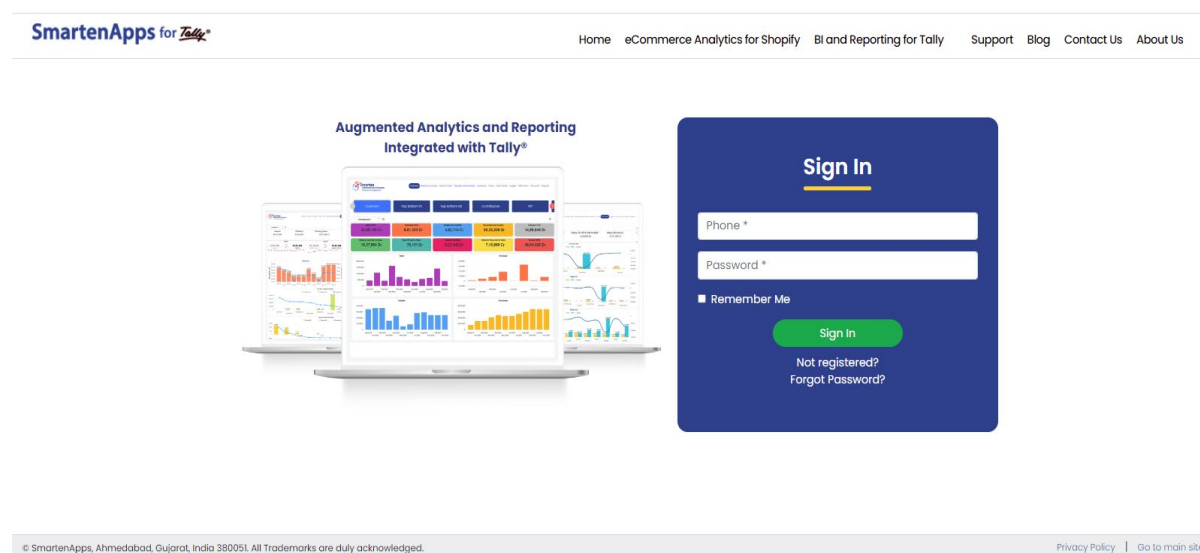
Like any other App, a shortcut will be created for the SmartenApps for Tally® mobile app on your mobile device once it is installed.



MOBILE APP—APP ICON

SmartenApps for Tally Web Portal

You can access SmartenApps for Tally® web from <https://finance.smartennapps.com> . You can use any browser to access SmartenApps for Tally®.



WEB PORTAL —HOME PAGE

5 Register with SmartenApps for Tally®

There are following ways through which you can register with SmartenApps for Tally®.

First time user in the organization – registering from web

First time user in the organization – registering from mobile

Additional user from organization – registering from web

Additional user from organization – registering from mobile

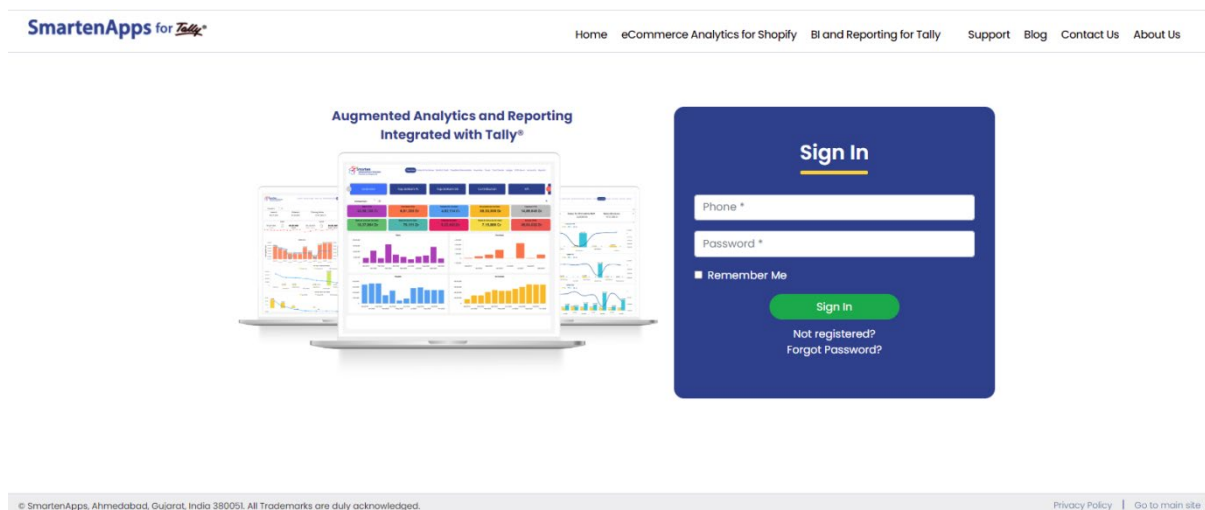
Follow the instructions below based on whether you are the first user from your organization or an additional user.

First time user in the organization – registering from web

Step 1: Go to <https://finance.smartenapps.com>

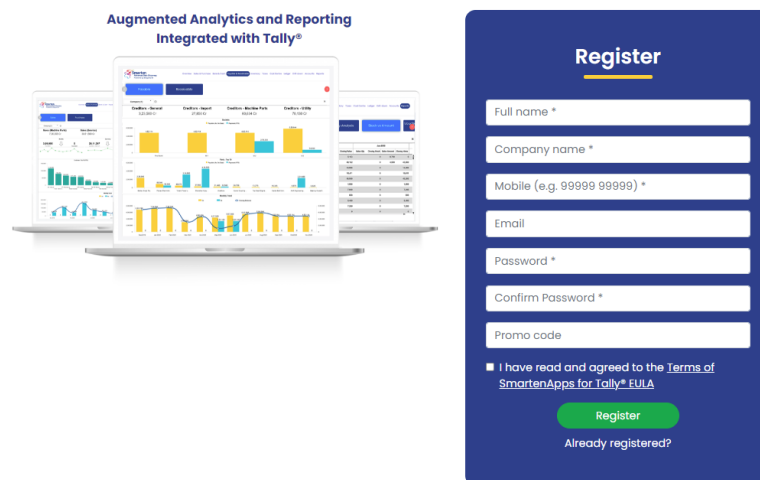
You can follow below steps to register yourself:

1. Open the URL on your desktop browser. It will show a SIGN IN page.



WEB PORTAL — HOME PAGE

2. On the SIGN IN page, click the **Not Registered?** Link just below the SIGN IN button.
3. The web portal displays the **REGISTER** page.

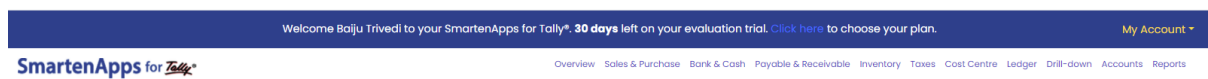


WEB PORTAL —REGISTRATION

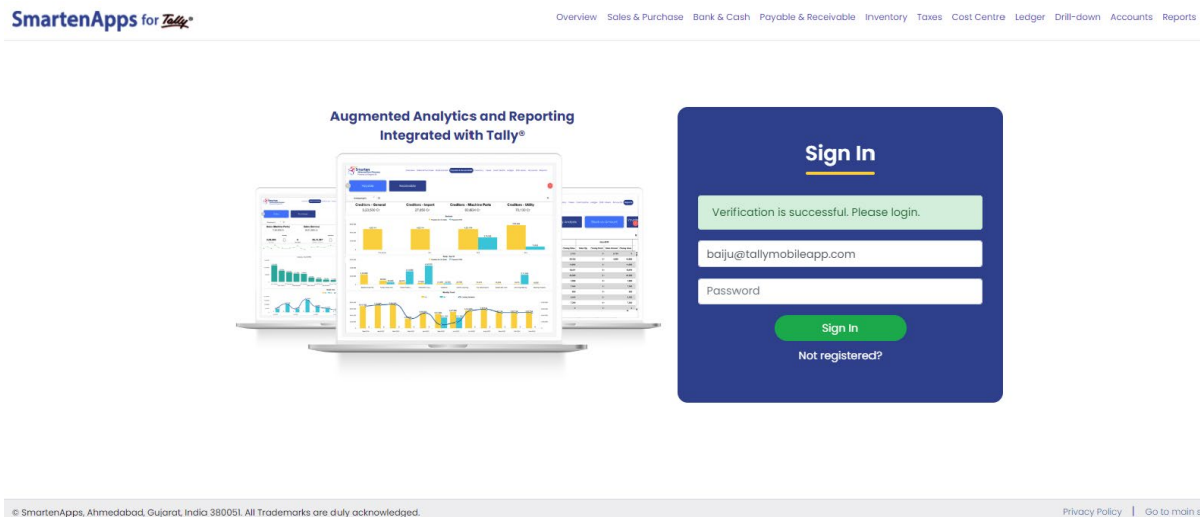
4. On the **REGISTER** page, in the **Full Name** field, enter your full name. It is mandatory to enter the name.
5. In the **Company Name** field, enter the name of your company.
6. In the **Email** field, enter your email address.
7. In the **Mobile No** field, enter the mobile number. You will be registered with this mobile number, so it is mandatory to enter.
8. In the **Password** field, enter the password you want to set as application password.
9. In the **Confirm Password** field, enter the password you have entered in the **Password** field.
10. In the **Promo code** field, enter promo code (if any).
11. Select the checkbox in front of the terms and conditions of the SmartenApps for Tally. Click the link to read the terms and conditions of the End-user license agreement.
12. Click the **REGISTER** button.
13. A Verification Code will be sent on your mobile number through SMS, which is valid for 24 hours.

Step 2: Verify your account with OTP verification on your registered mobile phone. OTP is valid for 24 hours

1. Mobile app will display verification page



2. On the **VERIFICATION** page, in the **Enter Verification Code** field, enter the Verification Code that you received on your mobile number.
3. Press Submit button.
4. Upon successful submission, your device and number are now registered with the SmartenApps for Tally. You will be redirected to **Sign In** page with a success message.



WEB PORTAL —SIGN IN

Step 3: Download, Install and configure Desktop App.

Reference: **Installation Manual > Install Desktop App – SmartenApps for Tally**

Step 4: You will be subscribed to a free 30-day evaluation plan that provides access via both the Web Portal and Mobile App.

Step 5: Start using SmartenApps for Tally from the Mobile App and Web Portal.

Step 6: Upon expiration of the 30-day free evaluation trial, or at any time during evaluation, you can go to Web Portal and choose and pay for your subscription (Web Only, Mobile App Only, Web & Mobile App).

First Time User in the Organization – Registering from Mobile

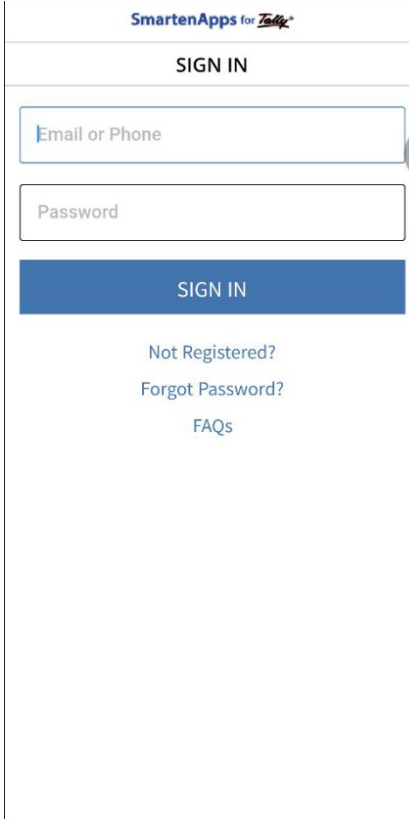
Step 1: Download the mobile app from app store.

To download the Mobile App – Search for ‘SmartenApps for Tally’ on Google Play store or Apple Store.

Step 2: Register from Mobile App (if you are a first user of your organization, you will be considered an admin for your organisation).

You can follow below steps to register yourself:

1. Open the Mobile App on your mobile device. It will show a SIGN IN page.



MOBILE APP —SIGN IN

2. On the SIGN IN page, click the **Not Registered?** Link just below the SIGN IN button.
3. The mobile app displays the **REGISTER** page.

SmartenApps for Tally®

← REGISTER

Full Name *

Company Name *

Email

Mobile (e.g. 99999 99999) *

Password *

Confirm password *

Promo Code

☐ I have read and agree to the [Terms of SmartenApps for Tally® EULA](#)

REGISTER

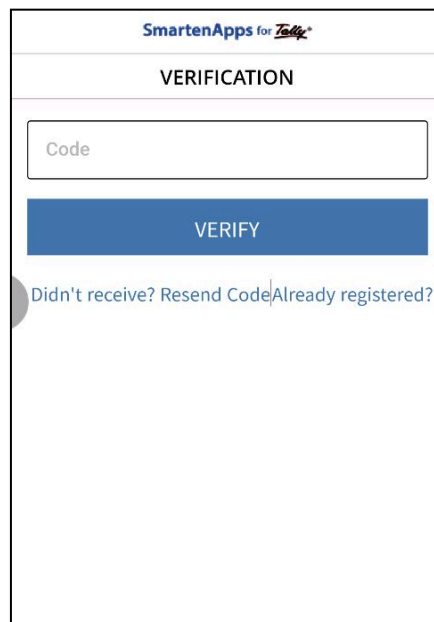
Already registered? [Login Here.](#)

MOBILE APP —REGISTRATION

4. On the **REGISTER** page, in the **Full Name** field, enter your full name. It is mandatory to enter the name.
5. In the **Company Name** field, enter the name of your company.
6. In the **Email** field, enter your email address.
7. In the **Mobile No** field, enter the mobile number. You will be registered with this mobile number, so it is mandatory to enter.
8. In the **Password** field, enter password you want to set for the application.
9. In the **Confirm Password** field, re-enter the password; you have entered in **Password** field.
10. In the **Promo code** field, enter the promo code (if any).
11. Select the checkbox in front of the terms and conditions of the SmartenApps for Tally. Click the link to read the terms and conditions of the End-user license agreement.
12. Click the **REGISTER** button.
13. A Verification Code will be sent on your mobile number through SMS, which is valid for 24 hours.

Step 3: Verify your account with OTP verification on your registered mobile phone. OTP is valid for 24 hours

1. Mobile app will display verification page



MOBILE APP — OTP VERIFICATION

2. On the **VERIFICATION** page, in the **Enter Verification Code** field, enter the Verification Code that you received on your mobile number.
3. Press Submit button.
4. Upon successful submission, your device and number are now registered with the SmartenApps for Tally. You will be redirected to **Sign In** page with a success message.

Step 4: Download, Install and configure Desktop App.

Reference: [Installation Manual > Install Desktop App – SmartenApps for Tally](#)

Step 5: You will be subscribed to a free 30-day evaluation plan that provides access via both the Web Portal and Mobile App

Step 6: Start using SmartenApps for Tally from the Mobile App and Web Portal

Step 7: Upon expiration of the 30-day free evaluation trial, or at any time during evaluation, you can go to Web Portal and choose and pay for your subscription (Web Only, Mobile App Only, Web & Mobile App).

Note:

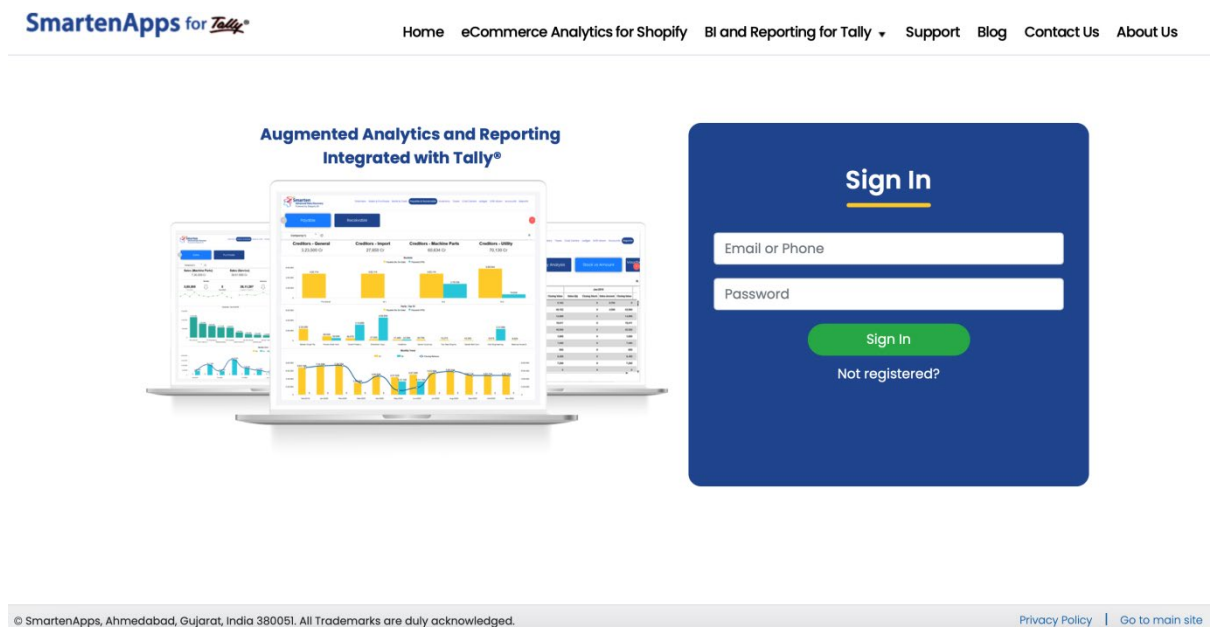
If you are the first user who has registered with the SmartenApps for Tally, you will be considered as the Administrator for the organization.

Additional users for the same organization – registering from web

Step 1: Go to <https://finance.smartenapps.com>

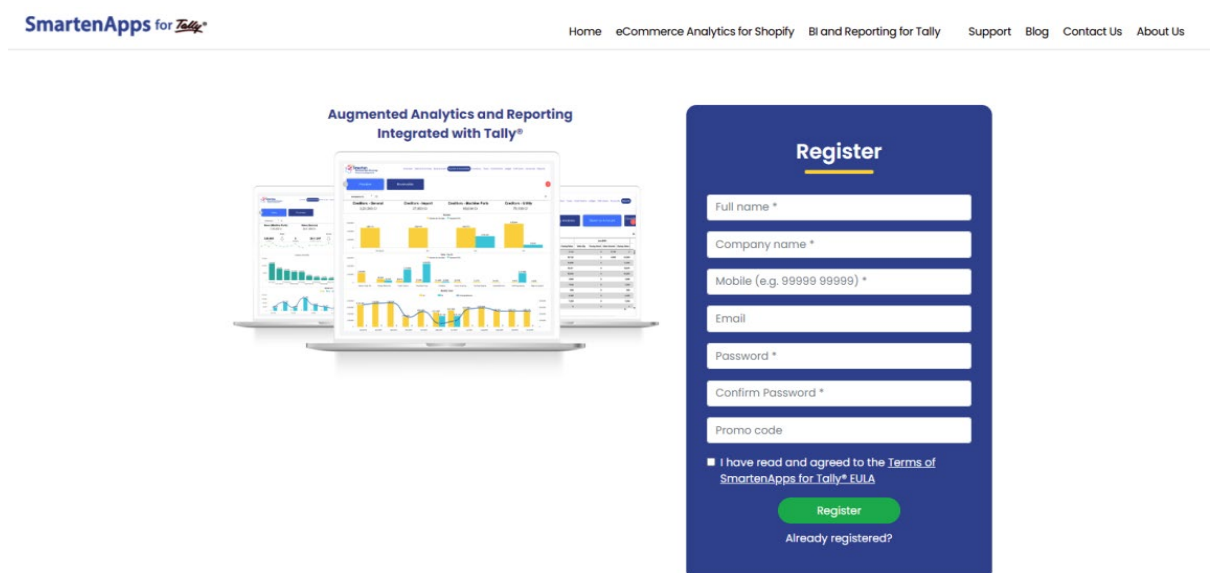
You can follow below steps to register yourself:

1. Open the URL on your desktop browser. It will show a SIGN IN page.



WEB PORTAL —HOME PAGE

2. On the SIGN IN page, click the **Not Registered?** Link just below the SIGN IN button.
3. The web portal displays the **REGISTER** page.



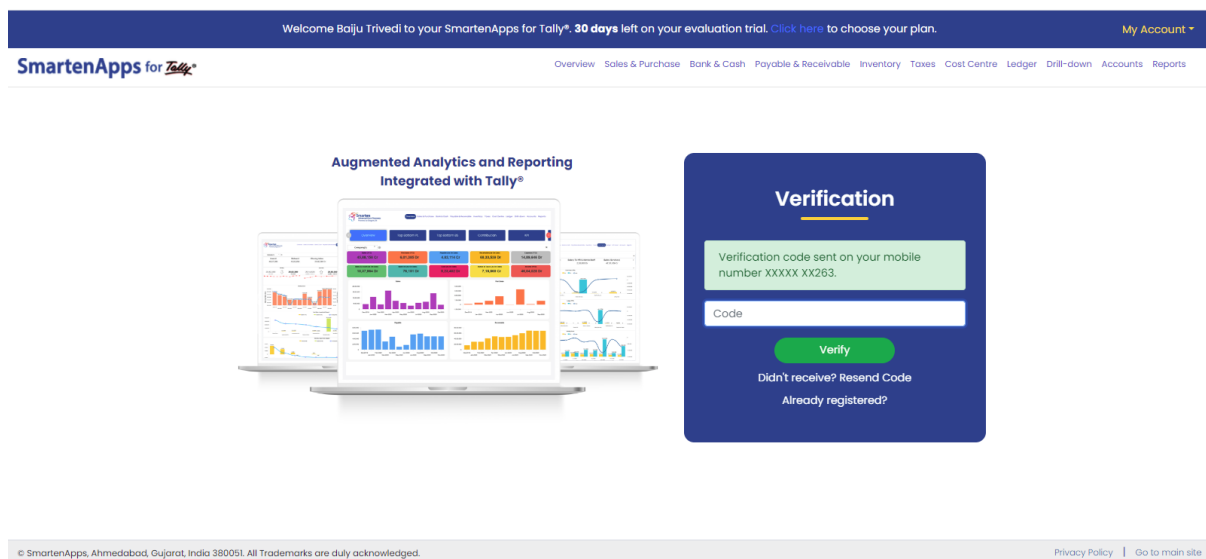
WEB PORTAL —REGISTRATION

4. On the **REGISTER** page, in the **Full Name** field, enter your full name. It is mandatory to enter the name.
5. In the **Company Name** field, enter the name of your company.
6. In the **Email** field, enter your email address.
7. In the **Mobile No** field, enter the mobile number. You will be registered with this mobile number, so it is mandatory to enter.

8. In the **Password** field, enter the password you want to set as application password.
9. In the **Confirm Password** field, enter the password you have entered in the **Password** field.
10. In the **Promo code** field, enter promo code (if any).
11. Select the checkbox in front of the terms and conditions of the SmartenApps for Tally. Click the link to read the terms and conditions of the End-user license agreement.
12. Click the **REGISTER** button.
13. A Verification Code will be sent on your mobile number through SMS, which is valid for 24 hours.

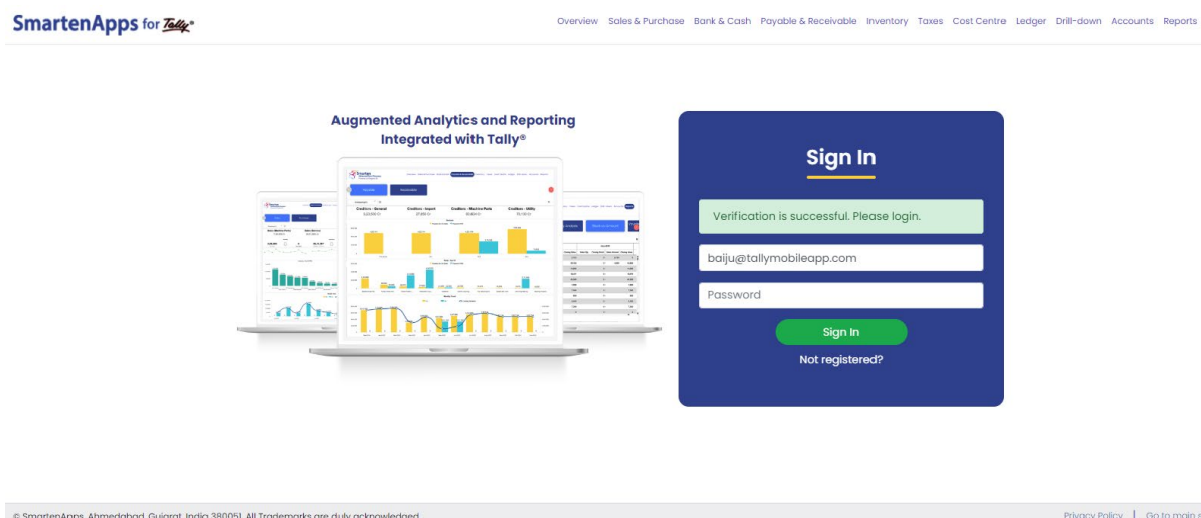
Step 2: Verify your account with OTP verification on your registered mobile phone. OTP is valid for 24 hours

1. Mobile app will display verification page



WEB PORTAL —REGISTRATION – OTP VERIFICATION

2. On the **VERIFICATION** page, in the **Enter Verification Code** field, enter the Verification Code that you received on your mobile number.
3. Press Submit button.
4. Upon successful submission, your device and number are now registered with the SmartenApps for Tally. You will be redirected to **Sign In** page with a success message.



WEB PORTAL —SIGN IN

Step 3: Received verification code needs to be provided to administration user (first user of your organization), who will be able to add users from user management screen of desktop app using this Verification code.

SmartenApps for Tally® - Add User

SmartenApps for Tally® (SP TEST)

Add User

User Verification Code **Submit**

Note :

Enter the User's Verification Code to add this User to the desktop application.

Users will receive a Verification Code on their registered mobile number after registering successfully through our mobile application. If not registered yet, the User needs to download our mobile application and complete the registration.

Note that the User's Verification Code is valid for 24 hours only. After that, the User needs to regenerate the Verification Code.

Contact us at tallysupport@SmartenApps.com you need any technical assistance.

User can download mobile app from www.SmartenApps.com

Cancel

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DESKTOP APP – ADD USER

Additional users for the same organization – registering from mobile

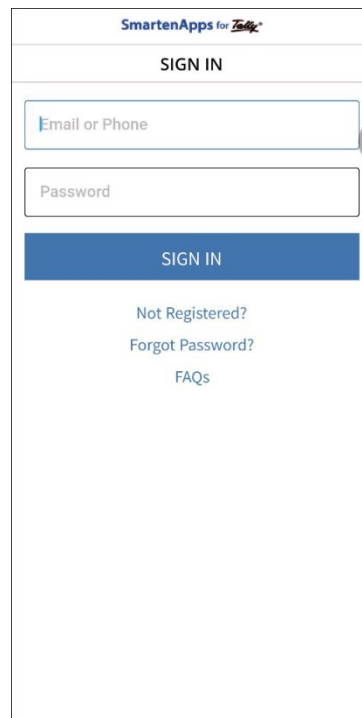
Step 1: Download the mobile app from app store.

To download the Mobile App – Search for 'SmartenApps for Tally' on Google Play store or Apple Store.

Step 2: Register from Mobile App (if you are a first user of your organization, you will be considered an admin for your organisation).

You can follow below steps to register yourself:

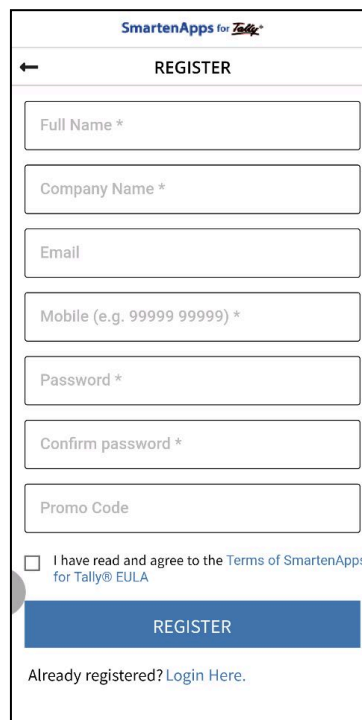
1. Open the Mobile App on your mobile device. It will show a SIGN IN page.



The image shows the SIGN IN screen of the SmartenApps for Tally mobile app. At the top, there is a header with the app's logo. Below the header, the title 'SIGN IN' is centered. There are two input fields: 'Email or Phone' and 'Password'. Below these fields is a blue button labeled 'SIGN IN'. Under the button, there are three links: 'Not Registered?', 'Forgot Password?', and 'FAQs'.

MOBILE APP —SIGN IN

2. On the SIGN IN page, click the **Not Registered?** Link just below the SIGN IN button.
3. The mobile app displays the **REGISTER** page.



The image shows the REGISTER screen of the SmartenApps for Tally mobile app. At the top, there is a header with the app's logo and a back arrow. Below the header, the title 'REGISTER' is centered. There are several input fields: 'Full Name *', 'Company Name *', 'Email', 'Mobile (e.g. 99999 99999) *', 'Password *', 'Confirm password *', and 'Promo Code'. Below these fields is a checkbox with the text 'I have read and agree to the Terms of SmartenApps for Tally® EULA'. Below the checkbox is a blue button labeled 'REGISTER'. At the bottom, there is a link: 'Already registered? Login Here.'

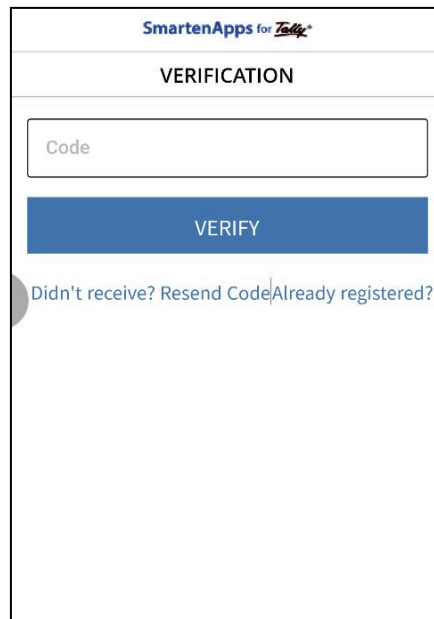
MOBILE APP —REGISTRATION

4. On the **REGISTER** page, in the **Full Name** field, enter your full name. It is mandatory to enter the name.
5. In the **Company Name** field, enter the name of your company.
6. In the **Email** field, enter your email address.
7. In the **Mobile No** field, enter the mobile number. You will be registered with this mobile number, so it is mandatory to enter.
8. In the **Password** field, enter password you want to set for the application.
9. In the **Confirm Password** field, re-enter the password; you have entered in **Password** field.

10. In the **Promo code** field, enter the promo code (if any).
11. Select the checkbox in front of the terms and conditions of the SmartenApps for Tally. Click the link to read the terms and conditions of the End-user license agreement.
12. Click the **REGISTER** button.
13. A Verification Code will be sent on your mobile number through SMS, which is valid for 24 hours.

Step 3: Verify your account with OTP verification on your registered mobile phone. OTP is valid for 24 hours

1. Mobile app will display verification page





The screenshot shows the 'VERIFICATION' screen of the SmartenApps for Tally mobile app. At the top, there is a header with the app's logo. Below the header, the word 'VERIFICATION' is displayed. A text input field labeled 'Code' is present, followed by a blue button labeled 'VERIFY'. Below the button, there is a link that says 'Didn't receive? Resend Code' and 'Already registered?'.

MOBILE APP — OTP VERIFICATION

2. On the **VERIFICATION** page, in the **Enter Verification Code** field, enter the Verification Code that you received on your mobile number.
3. Press Submit button.
Upon successful submission, your device and number are now registered with the SmartenApps for Tally. You will be redirected to **Sign In** page with a success message.

Step 4: Received verification code needs to be provided to administration user (first user of your organization), who will be able to add users from user management screen of desktop app using this Verification code.

SmartenApps for Tally® - Add User

(SP TEST)

SmartenApps for Tally®

Add User

User Verification Code

Note :

Enter the User's Verification Code to add this User to the desktop application.

Users will receive a Verification Code on their registered mobile number after registering successfully through our mobile application. If not registered yet, the User needs to download our mobile application and complete the registration.

Note that the User's Verification Code is valid for 24 hours only. After that, the User needs to regenerate the Verification Code.

Contact us at tallysupport@SmartenApps.com you need any technical assistance.

User can download mobile app from www.SmartenApps.com

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DESKTOP APP – ADD USER

6 Installing Desktop App - SmartenApps for Tally®

6.1 Download and Install Desktop App - SmartenApps for Tally® on your Desktop

Once you are registered with the SmartenApps for Tally, the next step is to download and install the Desktop App for the SmartenApps for Tally because the Desktop App connects to your Tally Application to fetch the data in a scheduled manner and stores it on a secured cloud server. The mobile app then communicates with the cloud server to fetch and display required data.

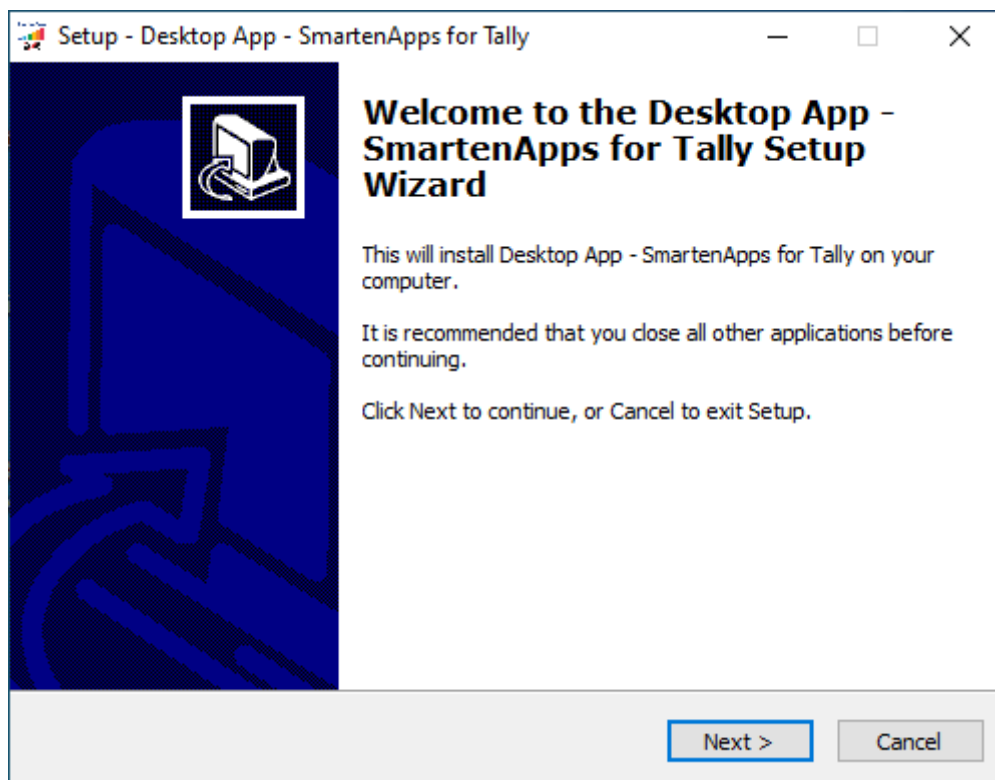
Note:

The machine on which the Desktop App has to be installed should have connectivity with the machine running Tally, and it should also be connected to the Internet so that it can push data from the Tally application to the cloud server.

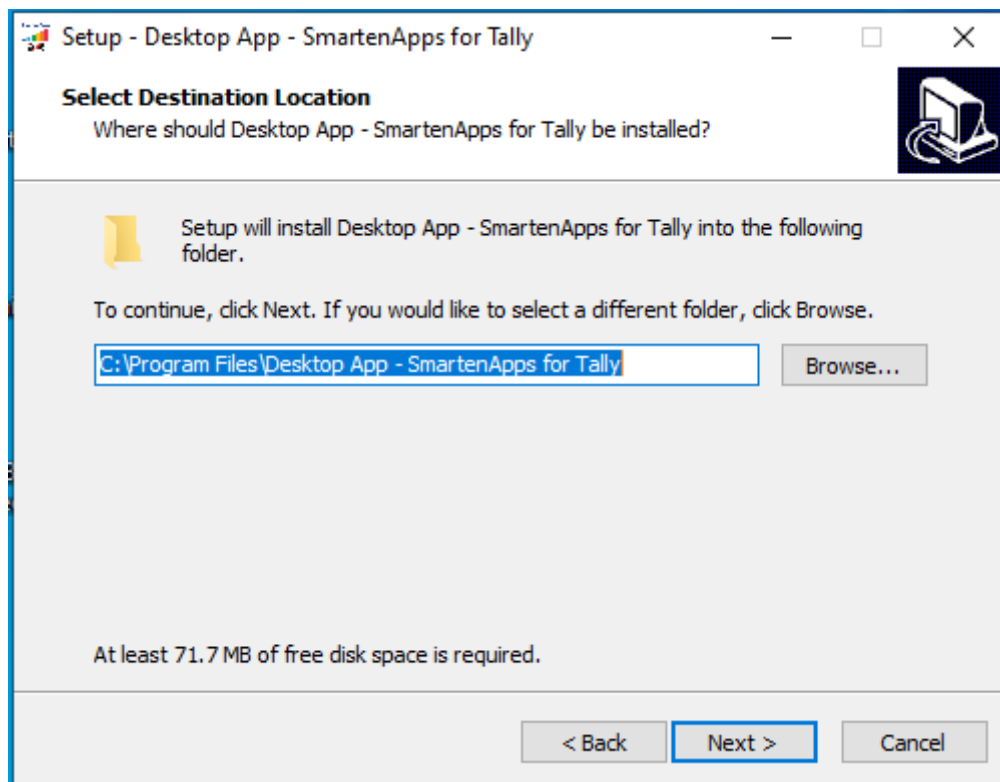
Although it is not mandatory, the Desktop App should preferably be installed on the same machine on which the Tally application is running.

You can download the Desktop App from our website <https://www.smartenapps.com/tallyerp/download-desktop-app-for-tally/>. This download is for Windows installer of Desktop App - SmartenApps for Tally. The installer that you have downloaded works seamlessly and installs the Desktop App - SmartenApps for Tally on any version of Windows 10 and above on your desktop. All you have to do is keep an eye on the **Next** button and click it to proceed to the next step. Eventually, the **Finish** button appears to complete the installation. The Desktop App will be installed on your system, and a shortcut will be created on the desktop.

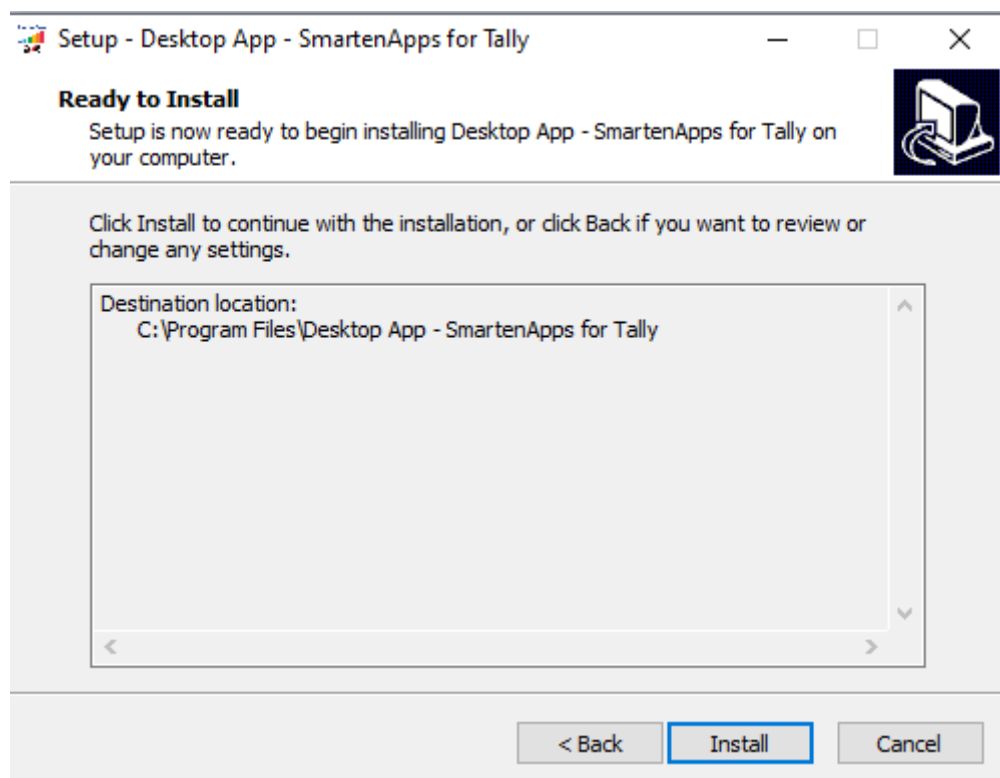
Shown below are the screenshots from the Installation wizard:



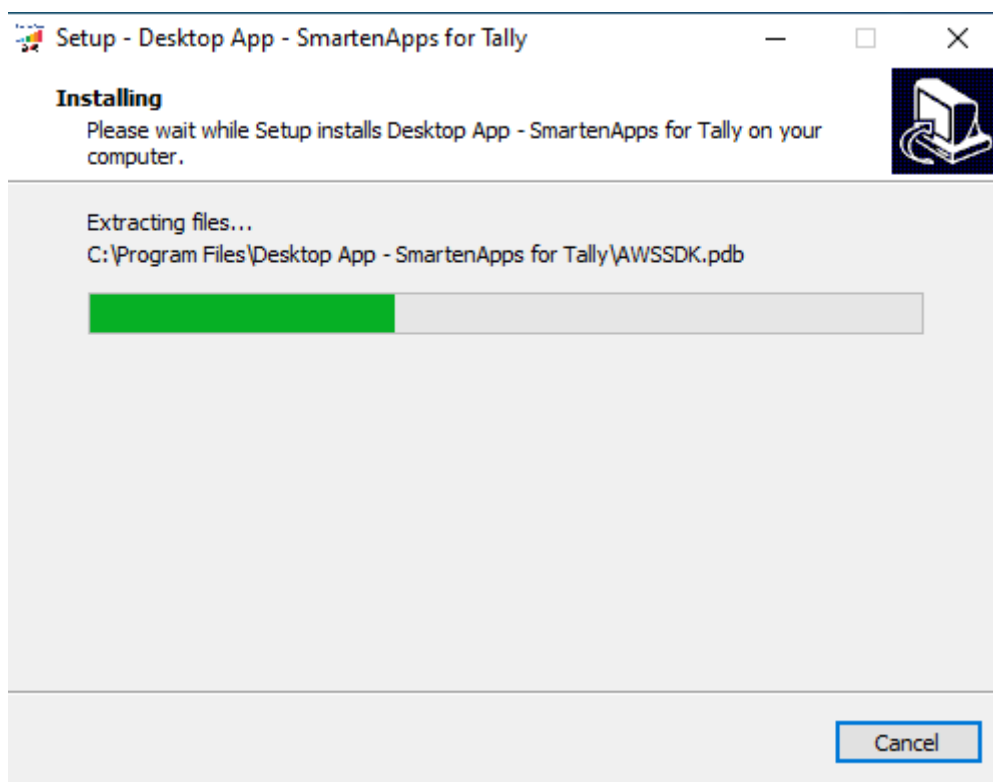
DESKTOP APP - INSTALLATION



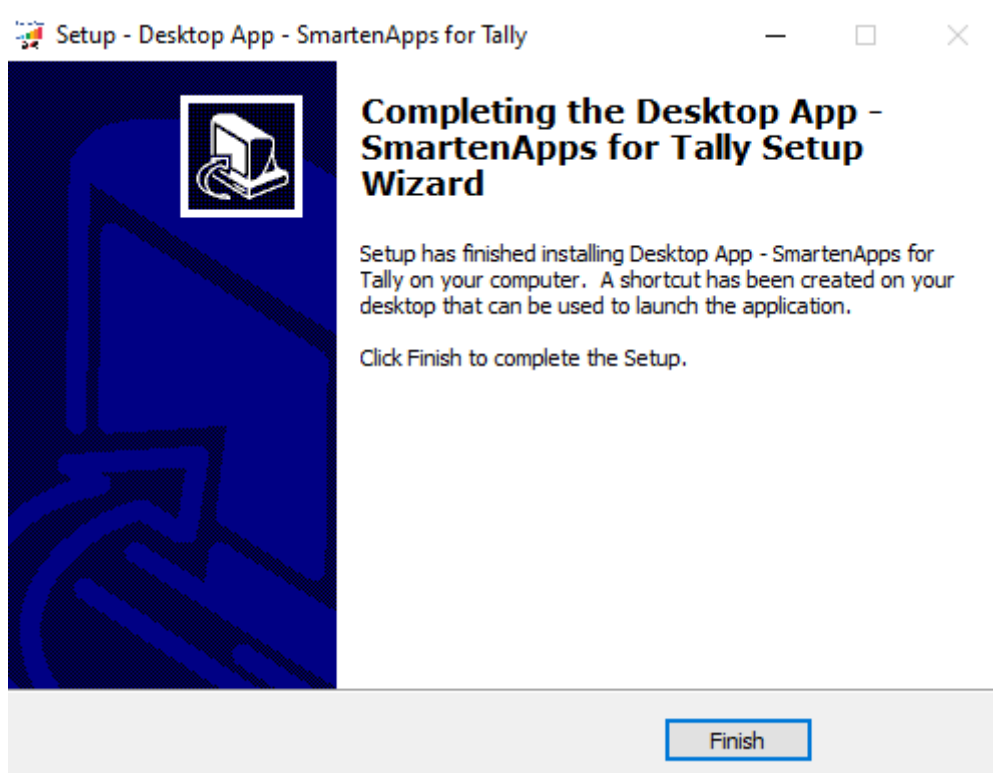
DESKTOP APP - INSTALLATION



DESKTOP APP - INSTALLATION



DESKTOP APP - INSTALLATION



DESKTOP APP - INSTALLATION

6.2 Log in to Desktop App - SmartenApps for Tally®

Once installed, a shortcut will be created on your desktop, which, in turn, will open a login screen of the Desktop App. You need to log in to the Desktop App with the same credentials used at the time of registration.

6.2.1 Login

About the task

Log in to the Desktop App - SmartenApps for Tally.

Procedure

1. Under the **Log-In** section in the **Mobile No** field, enter the registered mobile number.
2. In the **Password** field, enter the password that was used while registering for the Mobile App.

Note:

Please log in with the same credentials that were used to register with SmartenApps for Tally.

The first user who is registered with the SmartenApps for Tally is considered the Administrator for the Desktop App by default.

Additional users in your organisations do not need to install desktop application.



SmartenApps for Tally® - Login

SmartenApps
for Tally®

Log-In

Mobile No :
(e.g. 9999999999)

Password :

Login Cancel

DESKTOP APP - LOGIN

3. Click **Login**.
The system displays the **Verification Code** dialogue box.

SmartenApps for Tally®

(SP TEST)

Verification Code

Verify

Note :

You will receive a Verification Code on your registered mobile number after registering successfully through our mobile application. If you are not registered yet, please download our mobile application and complete the registration.

Note that the Verification Code is valid for 24 hours only. After that you need to regenerate the Verification Code.

Please feel free to contact us at tallysupport@SmartenApps.com any technical assistance.

You can download our mobile application from www.SmartenApps.com

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DESKTOP APP - VERIFICATION CODE

- Under the **Verification Code** section, in the **Verification Code** field, enter the Verification Code that you received on your mobile number through SMS while registering for the Mobile App.
- Click the **Verify** button.

The system displays the home screen only after a valid Verification Code is entered.

SmartenApps for Tally®

(SP TEST)

Tally Connection Settings

Select Companies

Data Refresh Scheduler

User Management

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DESKTOP APP — DASHBOARD

Once your Desktop App is installed and running, you can configure it for Tally by specifying connection settings, scheduler settings, and provide access rights to other users.

6.2.2 Configuring Desktop App

After logging in to the Desktop App - SmartenApps for Tally®, the first thing you need to do is configure the Desktop App as per your requirement. It is mandatory to configure the Desktop App so that it can connect to your Tally application to fetch the data in a scheduled manner defined by you and store it on a secured cloud server. The Mobile App then communicates with the cloud server to fetch and display required Tally data and access the SmartenApps for Tally Mobile App on your mobile.

The Desktop App is also used by the Administrator to add new users, inactivate users, and give them rights and permissions to access Tally companies in their respective Mobile App. If there are multiple users, there is no need to install the Desktop App on different machines. Additional users just need to download and install the Mobile App on their respective mobile device and register with the SmartenApps for Tally. Once that is done, they need to contact the Administrator who will give them rights and permissions to access Tally companies on their Mobile App.

6.2.3 Tally Connection Settings

To start, the Desktop App needs to connect to your Tally application. Only then can it fetch the data and store it on a secured cloud server.

About the task

Use this procedure to connect the Desktop App with your Tally application.

Procedure

1. From the dashboard, click the **Tally Connection Settings** button.

The system displays the **Tally Connection Settings** dialogue box.

SmartenApps for Tally® - Tally Connection Setting

SmartenApps for Tally® (SP TEST)

Tally Connection Setting

IP Address ⓘ localhost Port ⓘ 9000

Time Out (Milliseconds) ⓘ 6000000

Reset To Default Settings

Test Connection Save Cancel

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DESKTOP APP – TALLY CONNECTION SETTINGS

2. In the **IP Address** field, enter the Internet Protocol Address of the machine on which Tally is installed and running.

Reference: **Installation Manual > Installing Desktop App of SmartenApps for Tally® > Finding IP Address of Tally machine**

3. In the **Port** field, enter the Port Number that you have configured in the Tally application. The default Port Number is 9000.

Reference: **Installation Manual > Installing Desktop App of SmartenApps for Tally® > Finding Port Number of Tally application**

4. In the **Time Out** field, enter the time duration in milliseconds for which the Desktop App should keep trying to connect to the machine running Tally. The default duration is 60000 milliseconds.
5. Click the **Reset To Default Settings** button to reset all the above fields to default values.
6. Click the **Test Connection** button to test the connection between the Desktop App and Tally application.
7. Click the **Save** button to save the settings.
8. Click the **Cancel** button to discard changes and go back to the dashboard.
9. Click the **Dashboard** icon at the top right-hand corner of the screen to go back to the dashboard.
10. Click the **Log Out** icon at the top right-hand corner of the screen to sign out of the Desktop App.

6.2.3.1 Finding IP Address of Tally Machine

About this task

Use this procedure to find the IP Address of the machine on which Tally is installed and running.

Procedure

1. On the Windows machine running Tally, click the Start **menu**.
2. Select **Run**.
3. Type "CMD" in the box.
4. Click the **OK** button.
5. At the command prompt, type "ipconfig".

The system will display the IP Address of the machine under heading **IPv4 Address** just above the Subnet Mask.

```
C:\WINDOWS\system32\cmd.exe
Microsoft Windows [Version 10.0.10586]
(c) 2015 Microsoft Corporation. All rights reserved.

C:\Users\apeksha>ipconfig

Windows IP Configuration

Ethernet adapter Local Area Connection:

    Connection-specific DNS Suffix . : 
    IPv4 Address. . . . . : 10.0.0.206
    Subnet Mask . . . . . : 255.255.255.0
    Default Gateway . . . . . : 10.0.0.8

Tunnel adapter Teredo Tunneling Pseudo-Interface:

    Connection-specific DNS Suffix . : 
    IPv6 Address. . . . . : 2001:0:9d38:90d7:380a:195e:4b2c:9c9c
    Link-local IPv6 Address . . . . : fe80::380a:195e:4b2c:9c9c%12
    Default Gateway . . . . . : 

Tunnel adapter isatap.{837B95C5-36B6-48D3-B6B3-E7036FABE38B}:

    Media State . . . . . : Media disconnected
    Connection-specific DNS Suffix . : 

C:\Users\apeksha>
```

COMMAND PROMPT—IPCONFIG

6. Type “Exit” to close the command prompt, or click the **Close** icon in the upper right-hand corner to close the window.

6.2.3.2 Finding Port Number of Tally Application

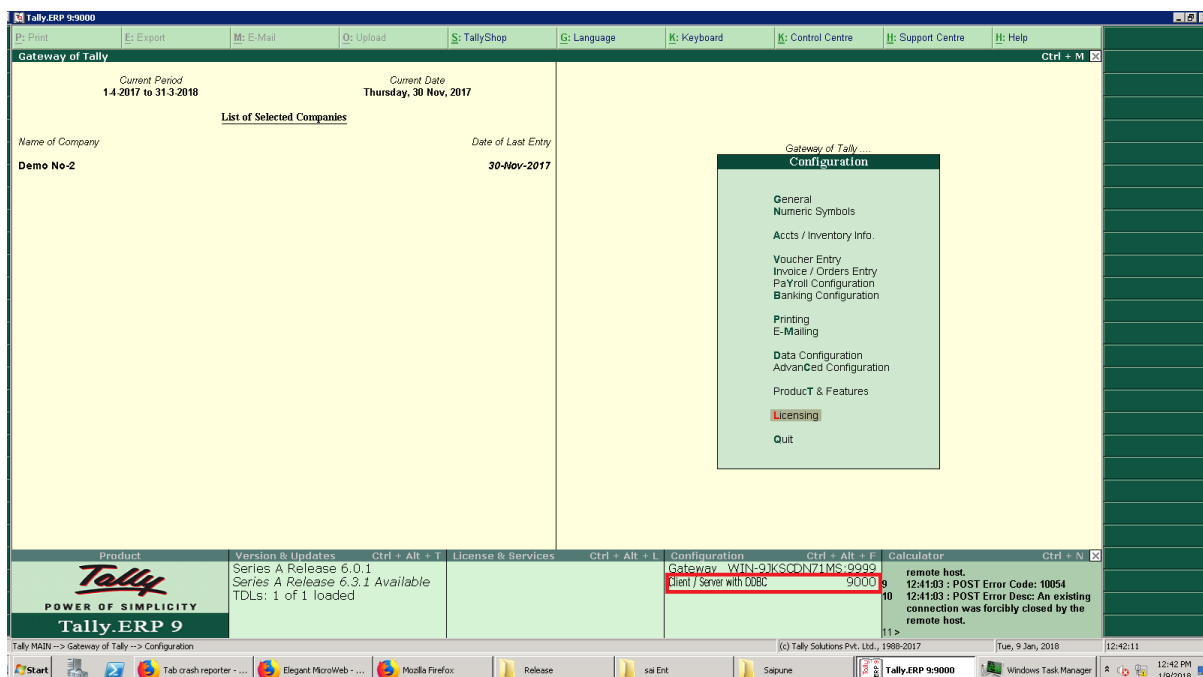
About this task

Use this procedure to find the Port Number of your Tally application.

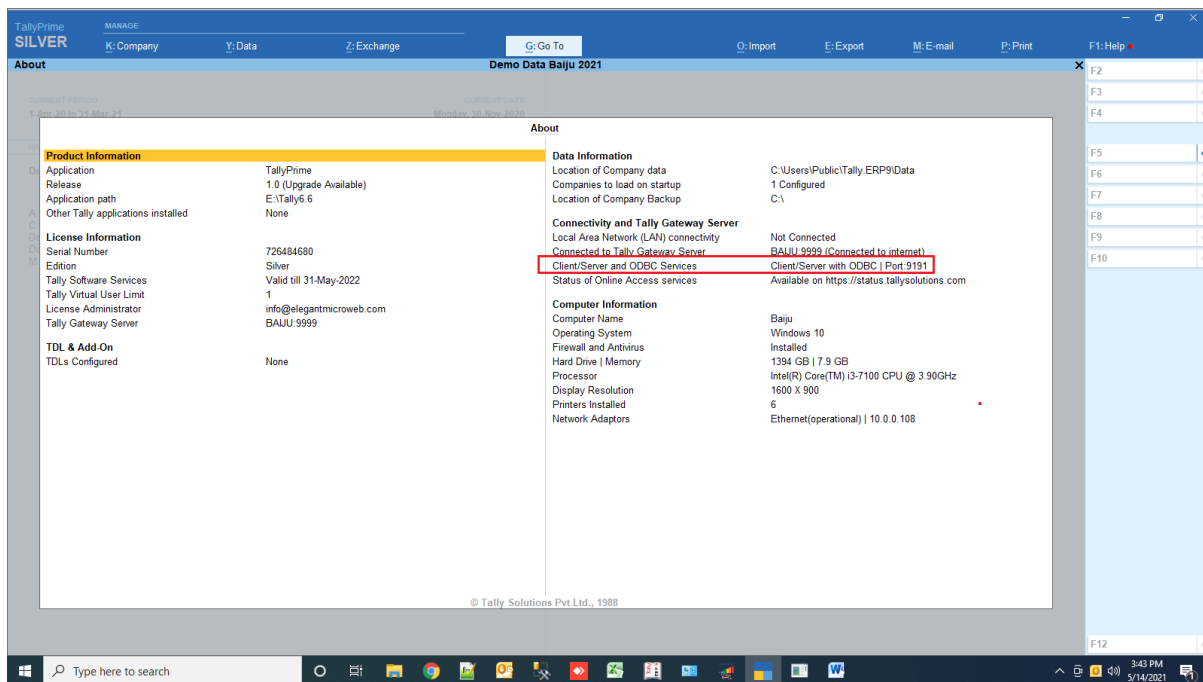
Procedure

1. Start Tally application.
2. Go to the **Configuration** Section at the bottom of the screen.

Port Number is mentioned under heading **Client/Server with ODBC**.



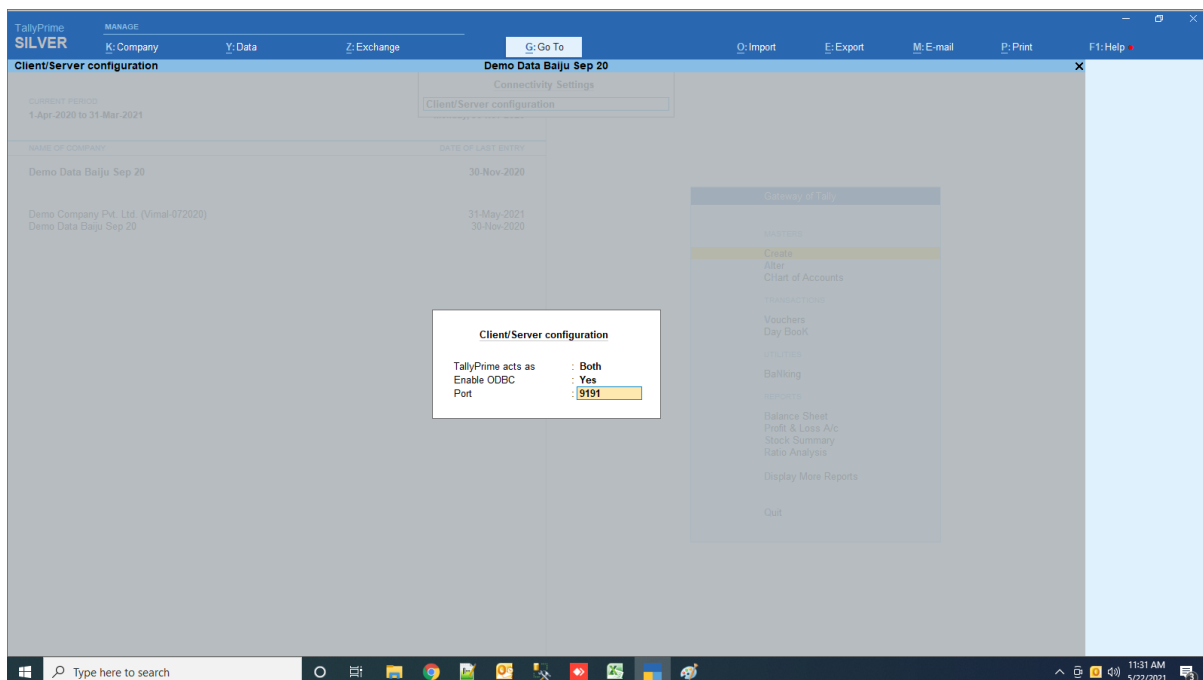
TALLY APPLICATION—PORT NUMBER



TALLY (PRIME) APPLICATION—PORT NUMBER CLIENT / SERVER CONFIGURATION: (FOR TALLY PRIME)

Procedure

1. Start Tally Prime application.
2. Go to **Help (F1) → Settings → Connectivity → Client/Server Configuration**, Set **TallyPrime** act as to “**BOTH**”
Set **Port** number (e.g. 9191 or 9090)

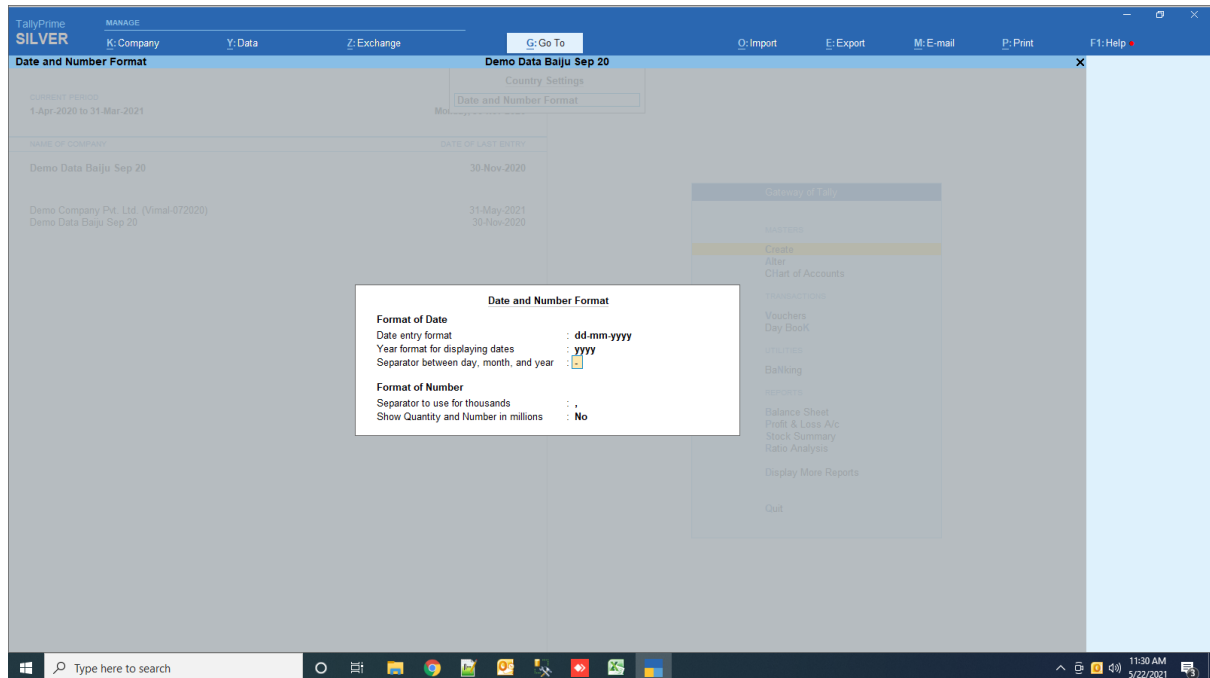


TALLY (PRIME) APPLICATION—CLIENT / SERVER CONFIGURATION

Date Format: To set **Date & Year** format (For Tally Prime)

Procedure

3. Start Tally Prime application.
4. Go to **Help (F1) → Settings → Country → Date & number format**
Set **Date Entry Format** as “dd-mm-yyyy” & Year format for display date as “YYYY”.



TALLY (PRIME) APPLICATION—DATE & YEAR FORMAT

6.2.4 Select Companies

Once the connection to the Tally application is established, you need to select the companies that can be accessed by the Desktop App, which will be able to fetch data of only the selected companies.

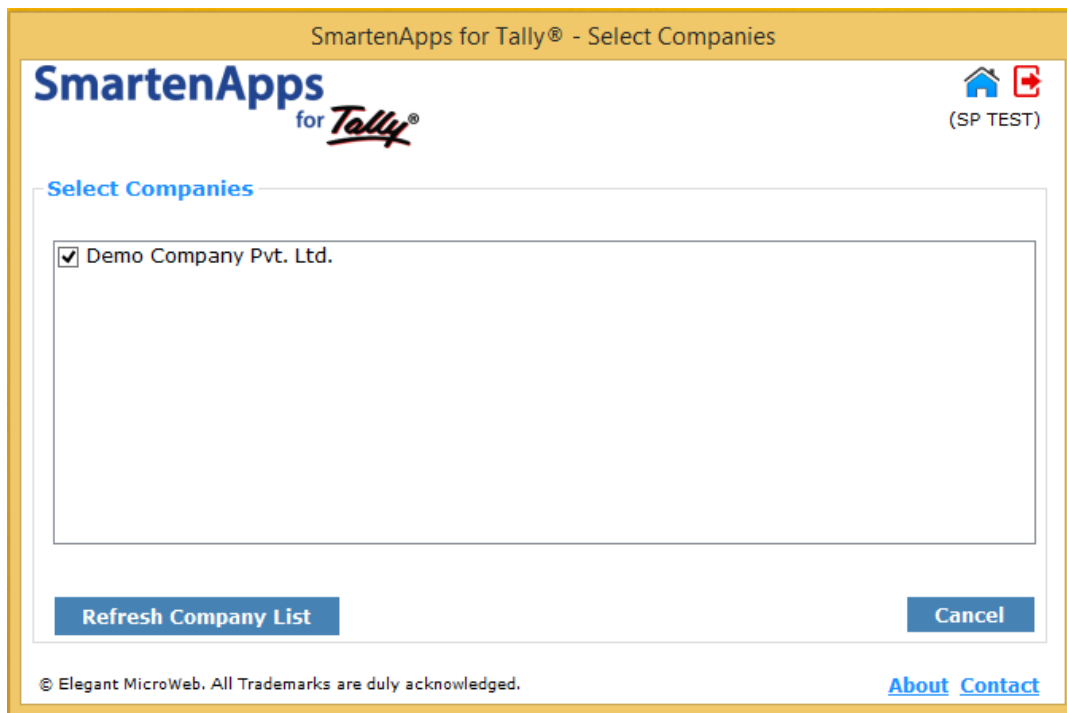
About the task

Select companies for the Desktop App.

Procedure

1. Follow the procedure of **Tally Connection Settings**.
2. From the dashboard, click **Select Companies** button.

The system displays the **Select Companies** dialogue box.



DESKTOP APP — SELECT COMPANIES

- Under the **Select Companies** section, from the list of Companies, select the checkbox in front of the Company Name for which you want to access the data.

Note:

This list will display only those companies that are already open in your Tally application. So please make sure that the company for which you want the Desktop App to access data remains open in the Tally application.

- Click the **Refresh Company List** button to refresh the list of companies with all those that are currently open in your Tally application.
- Click the **Save** button to save the Company selection.
- Click the **Cancel** button to discard the selection and go back to the dashboard.
- Click the **Dashboard** icon at the top right-hand corner of the screen to go back to the dashboard.
- Click the **Log Out** icon at the top right-hand corner of the screen to sign out of the Desktop App.

6.2.5 User Management

To check the product version of Smarten installed and license-related information:

User Management can be used by the Administrator to undertake user-related activities, such as add new users, inactivate users, and give them rights and permissions to access Tally companies in their respective Mobile App.

Note:

All new users will be granted access to selected companies by default. The Administrator at any point in time can change the rights and permissions of any user to access any company. Users will be able to access Tally data on their Mobile App for only those companies for which they have permission.

About the task

Use this procedure for Company Settings for the Administrator.

Procedure

1. Follow the procedure of **Select Companies**.
2. From the dashboard, click the **User Management** button.

The system displays the **User Management** dialogue box.

SmartenApps for Tally® - User Management

(SP TEST)

SmartenApps for Tally®

User List

Name	Mobile Number	Registration	Subscription Type	Subscription Start	Subscription End	
Sahil Patel	9925038091	28/04/2021	paid	28/04/2021	28/04/2022	

Add New User
Cancel

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DESKTOP APP—USER MANAGEMENT

3. Click the **Companies Settings** icon at the end of the row with your name.

The system displays the **Companies Settings** dialogue box with a list of companies. This list displays only those companies that were selected for the Desktop App through the **Select Companies** button.

Reference: **Installation Manual > Installing Desktop App of SmartenApps for Tally® > Configuring Desktop App > Select Companies**

SmartenApps for Tally®

User SP TEST

Select Companies

☒ Demo Company Pvt. Ltd.

Save
Cancel

DESKTOP APP - USER MANAGEMENT—COMPANIES SETTINGS

4. Select the checkbox in front of the Company Name for which you want to access the data.
5. Click the **Save** button to save the Company selection.
6. Click the **Cancel** button to discard the selection and go back to the dashboard.
7. Click the **Dashboard** icon at the top right-hand corner of the screen to go back to the dashboard.
8. Click the **Log Out** icon at the top right-hand corner of the screen to sign out of the Desktop App.

6.2.6 Data Refresh Scheduler

The Data Refresh Scheduler allows the Administrator to create a schedule to push data from the Tally application to the secured cloud server.

Note:

Data will be saved for only those companies that have been selected through the **Select Companies** option.

About the task

Use this procedure for create the Data Refresh Scheduler.

Procedure

1. Follow the procedure of **Select Companies**.
2. From the dashboard, click the **Data Refresh Scheduler** button.

The system displays the **Data Refresh Scheduler** dialogue box.

SmartenApps for Tally® - Data Refresh Scheduler

SmartenApps for Tally® (SP TEST)

Data Refresh Scheduler

Scheduler Frequency ⓘ
 Hourly ▼ Every 4 ▼ Hour(s)

Start Time ⓘ
 00 ▼ 00 ▼

Incremental Data Extract From ⓘ
 Previous Financial Year ▼

Run Now **Disable** **Scheduler Log** **Save** **Cancel**

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DESKTOP APP—DATA REFRESH SCHEDULER

3. In the **Scheduler Frequency** field, select the frequency from the drop-down list (Hourly or Daily).
4. Select an option for daily or hourly reoccurrence from the drop-down list.
5. Select the **Start Time** from the **Hour** and **Minute** drop-down lists.
6. Select the **Incremental Data Extract From**, you can pull data from Previous Financial Year or Current Financial Year.
7. Click the **Run Now** button to start the Scheduler.

8. Click **Enable / Disable** button to setup a task scheduler on your desktop
9. Click the **Save** button to save the Scheduler.
10. Click the **Cancel** button to discard the selection and go back to the dashboard.
11. Click the **Dashboard** icon at the top right-hand corner of the screen to go back to the dashboard.
12. Click the **Log Out** icon at the top right-hand corner of the screen to sign out of the Desktop App.

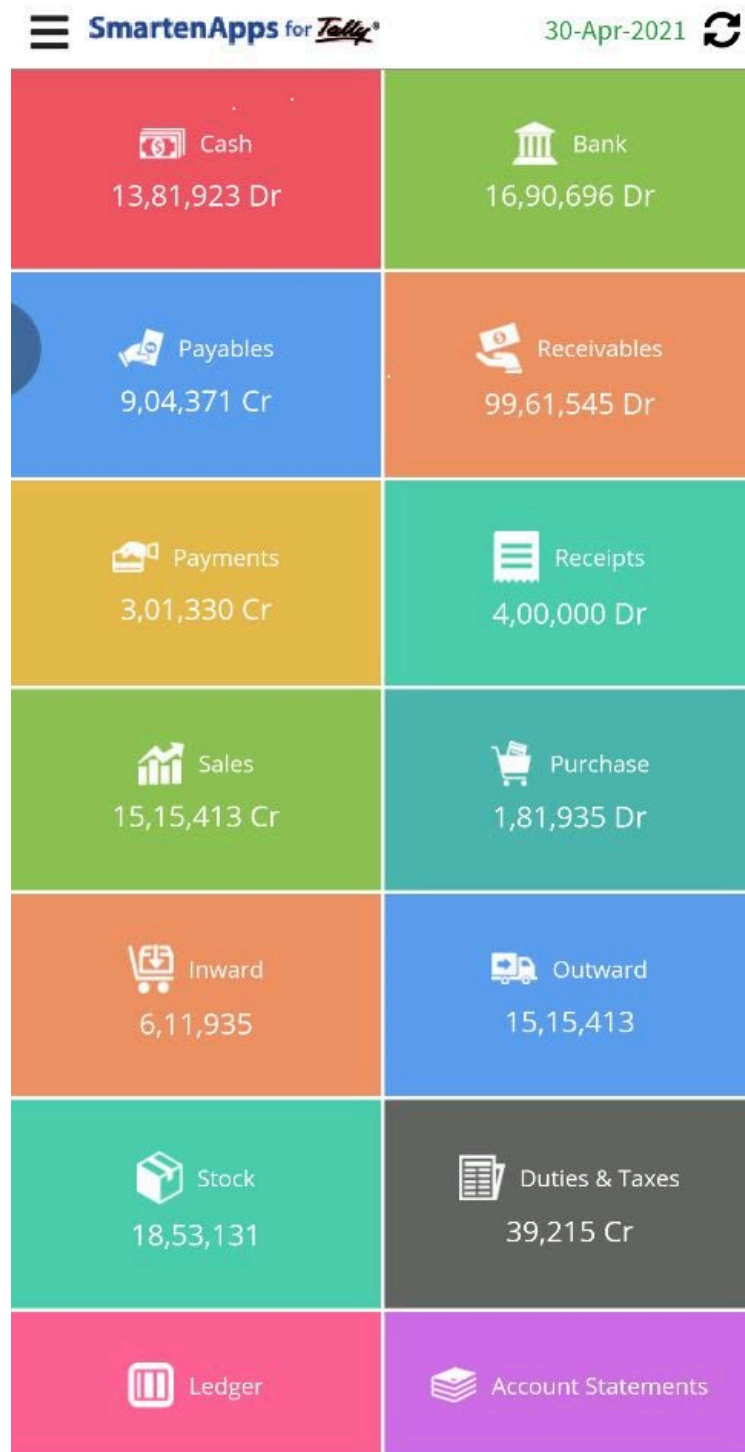
At this stage, the Desktop App is configured, and required Tally data has been saved on the secured cloud server. You can now start using the Web and Mobile App to access Tally data.

Once you login through web browser on <https://finance.smartennapps.com> , you will see your Tally company data as below.



WEB PORTAL ACCESS

Once you login through mobile app, you will see your Tally company data as below.



MOBILE APP – ACCESS

7 Product and Support Information

Find more information about the SmartenApps for Tally and its features at www.SmartenApps.com

Support: TallySupport@SmartenApps.com

Sales: TallySales@SmartenApps.com

Feedback & Suggestions: TallySupport@SmartenApps.com

Support Portal: <https://TallySupport.SmartenApps.com/>

Evaluation Copy Download: <https://www.SmartenApps.com/TallyERP/>