Document tagging in Accounting Tally and Zoho

Tell me about your attachments.
You mean my jpegs and pdf files?
CARTOONSTOCK .com

Tally and Zoho

Tally.ERP9

- On Premise
- Documents can be attached using Tally customised module
- Documents can be attached at Master Level or Transaction Level
- Multiple document can be attached to single master or single transaction

Zoho Books

- On Cloud
- Documents attachment available as default feature
- Documents can be attached only at Transaction Level
- You can upload maximum 5 files of 5 MB each

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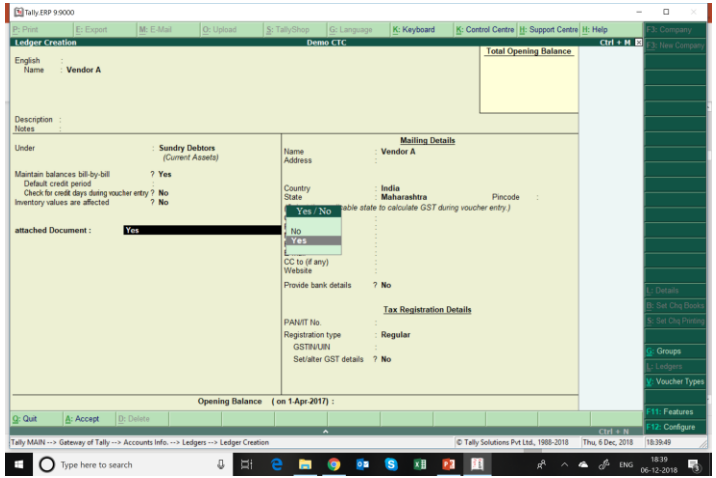
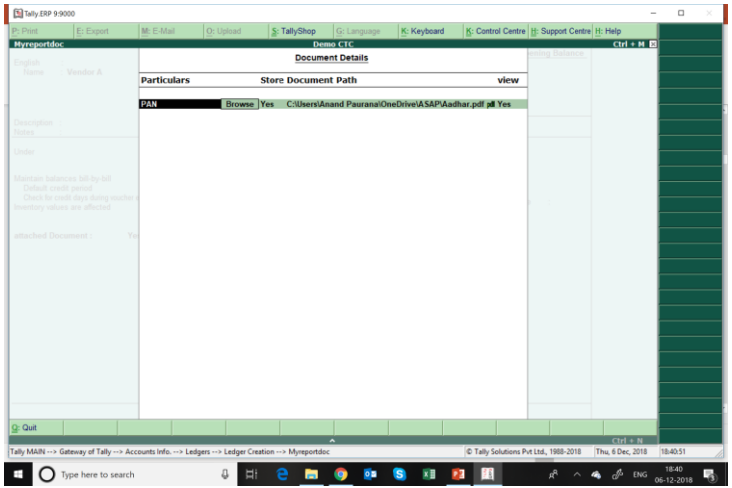
Tally.ERP9

Let’s explore Document Management

Tally.ERP9 Document attachment at Master Level

- Attach KYC Docs
- Attach contracts / agreements





Tally.ERP9 Document attachment at Master Level

- Attach Multiple Documents
- Documents can be attached for more than one master
- Security control can be built to
  - Allow / disallow user to attach / view or alter the attached documents

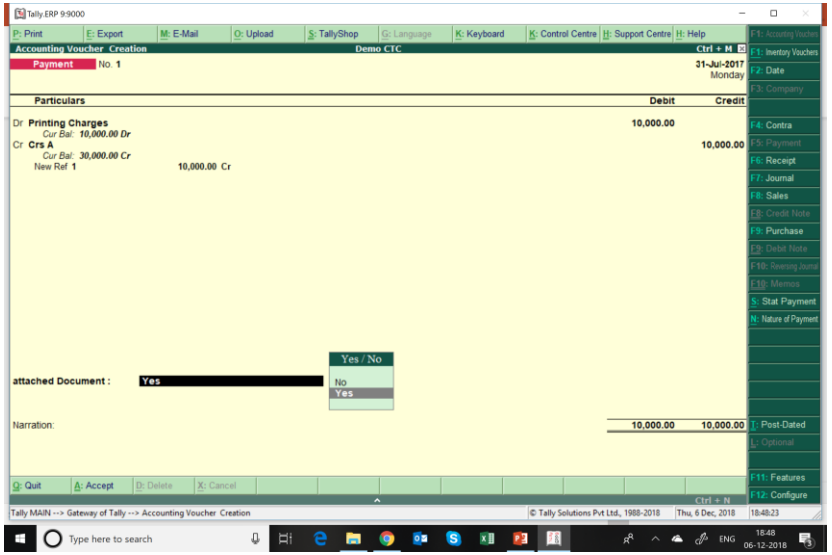
Tally.ERP9 Document attachment at Transaction Level

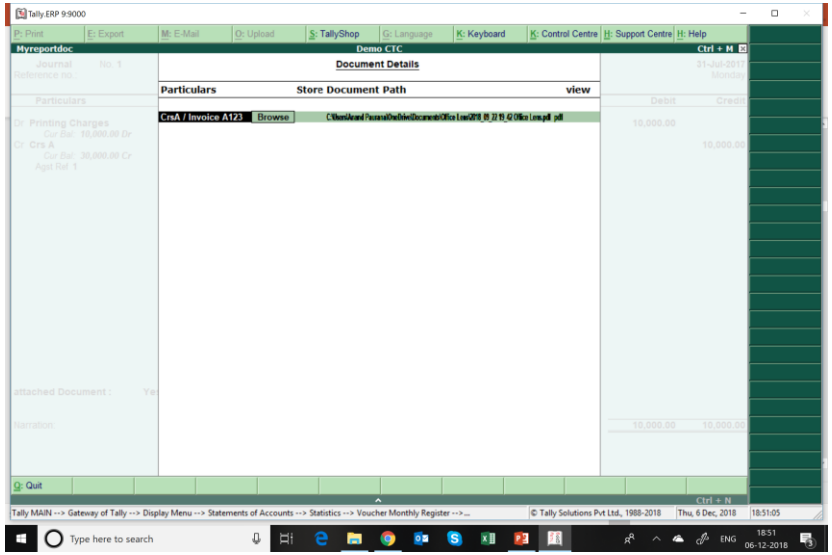
- Attach Multiple Documents
- Easier for Auditor and Auditee
- Security control can be built to
  - Allow / disallow user to attach / view or alter the attached documents

Tally.ERP9 Document attachment at Transaction Level

- Attach Supporting documents
- Attach tax working in Excel / PDF file
- Attach PO with Purchases
- Attach Expenses approval note
- Attach email of management / consultant
- Attach……any thing

Tally.ERP9 Document attachment at Transaction Level





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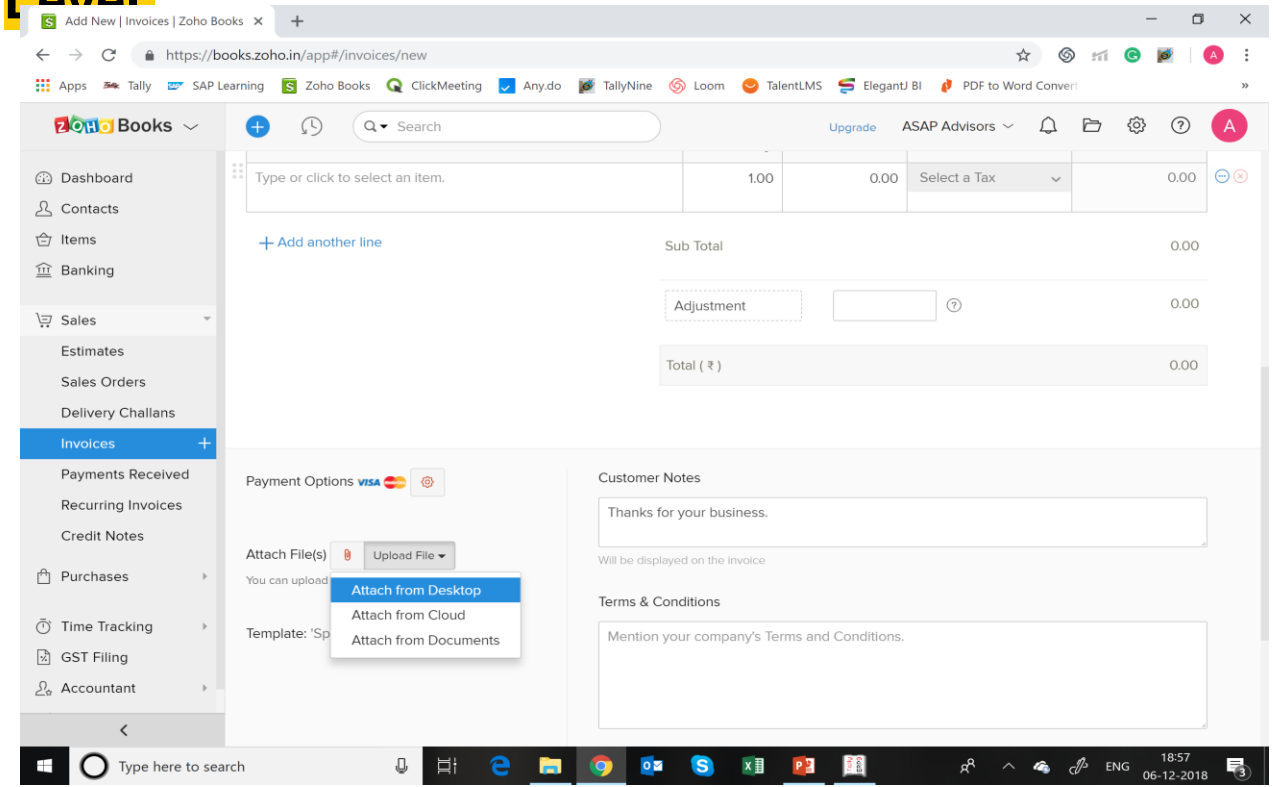
Zoho Books

Let’s explore Document Management

Zoho Books Document attachment at Transaction Level

- Attach Supporting documents
- Attach from Desktop / Cloud / already uploaded documents in Zoho Docs
- Attach……any thing
- Maximum 5 Files, 5 MB each

Zoho Books Document attachment at Transaction Level



Let’s See this in Action

Thanks!

Any questions ?

You can reach me at

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