Steps to configure *Tally SyncApp* with Tally ERP
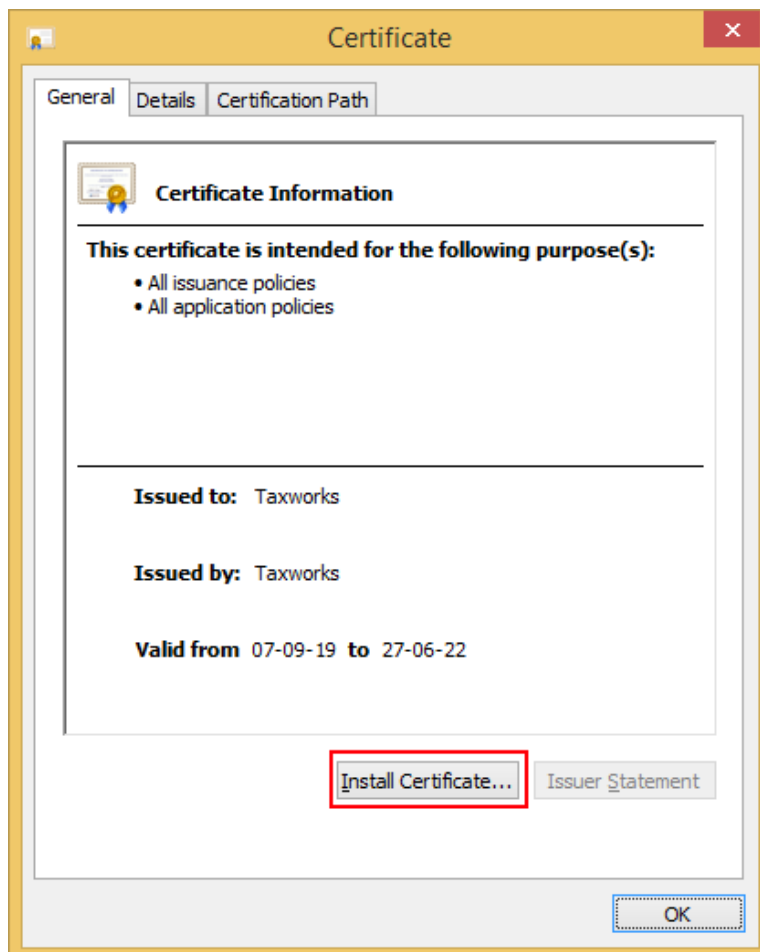
A. To download SyncApp

1. Download Tally Sync application from www.taxworks.in

2. Unzip Taxworks.zip file

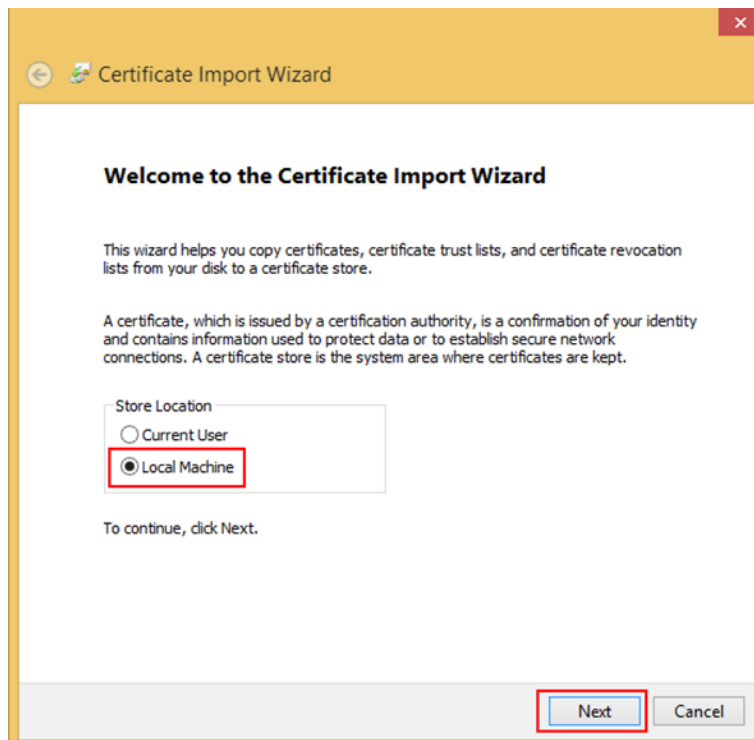3. Unzip will extract two files Taxworks Certificate and Taxworks.exe

B. How to configure Taxworks certificate

1. Click on Taxworks Certificate file in the unzipped folder

2. Click on Install Certificate
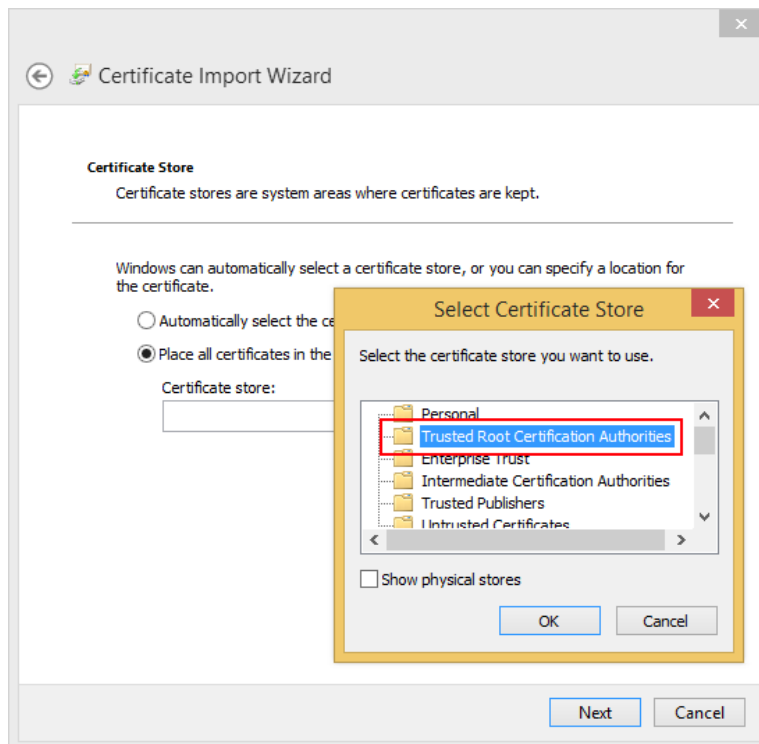
![Taxworks logo](Taxworks.)

Steps to configure *Tally SyncApp* with Tally ERP
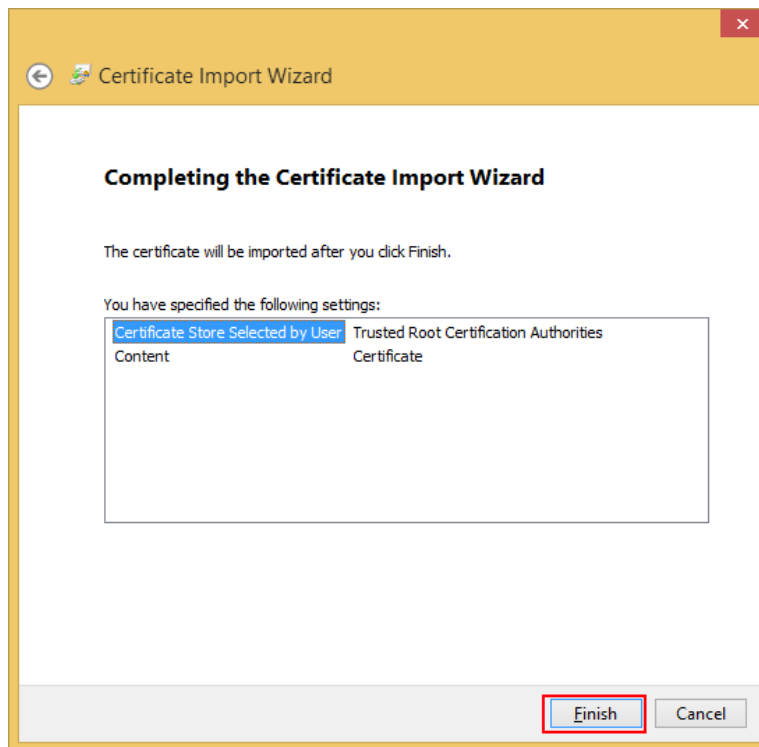
3. Select Store Location as Local Machine

4. Browse Certificate Store and select "Trusted Root Certification Authorities"
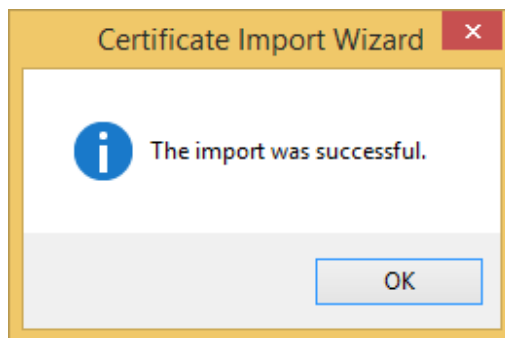
5. Click Ok

6. Click Finish to complete the Certificate Import Wizard

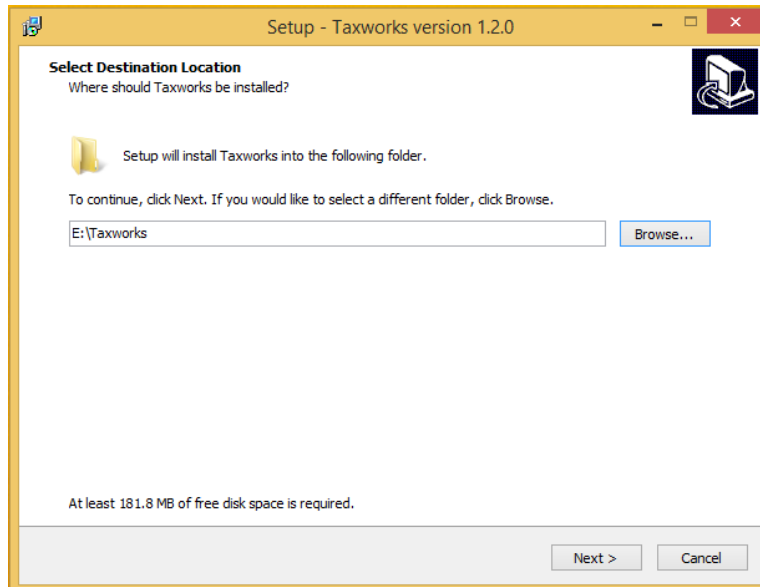# Steps to configure *Tally SyncApp* with Tally ERP

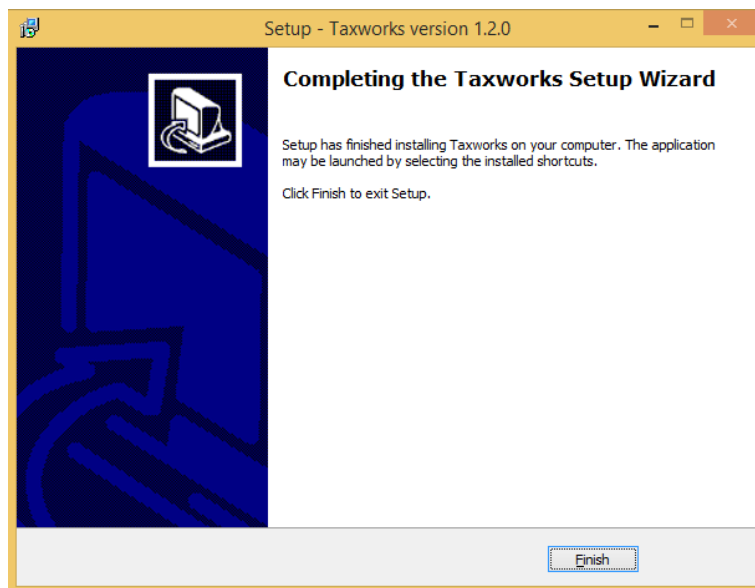7. Certificate import successful completed

Taxworks.

Steps to configure *Tally SyncApp* with Tally ERP

C. How to install Tally SyncApp

1. Run Taxworks.exe file in the unzipped folder as a administrator
2. Specify the patch to install

3. Complete Installation

4. Firewall settings if required.
   Taxworks uses *(Port: 19995)* for communication

Taxworks.

Steps to configure *Tally SyncApp* with Tally ERP

D. Configurations to be made in Tally ERP 9.x

1. Navigate to "Gateway of Tally" and press F12 function key to navigate to configuration screen

    F12: Configure

2. Navigate to Advanced Configuration

    AdvanCed Configuration

3. Enable Tally ERP 9 is acting as "Both"
4. Enable Port 9000

5. Accept the changes with "Yes"
6. Navigate to Data Configuration

    Data Configuration

7. Check for the location of data files storage path

    It can be a local storage: **http://Localhost:9000**

    (or) *It can be pointed to an internal Tally server path by Tally ERP administrator.*

    In this example: **http://TallyServer:9000**

8. Navigate to any web browser like Internet Explorer or Google Chrome and specify the tally data access path

Steps to configure *Tally SyncApp* with Tally ERP

9. Verify you are receiving the following response, which confirms that the Tally has started working as a server based on configuration.
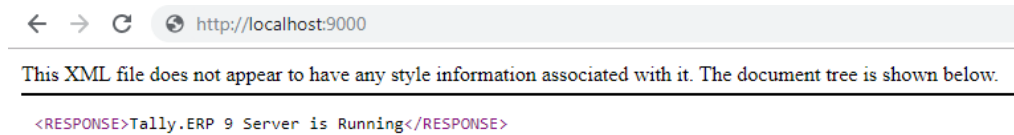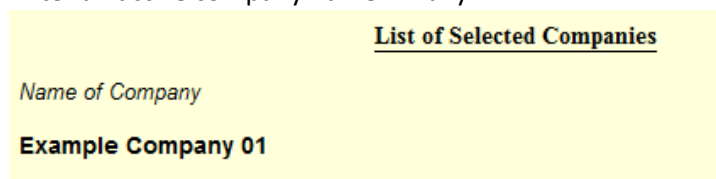

E. Handshake SyncApp with Tally ERP

1. Navigate to the SyncApp application by clicking on the desktop shortcut icon in desktop
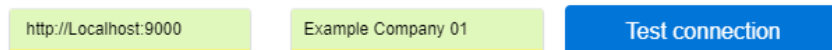

2. To establish handshake with Tally ERP for data access
   - Navigate to Test Connection
   - Enter the tally data access path. Example: *Http://localhost:9000*
   - Enter an active company name in Tally ERP
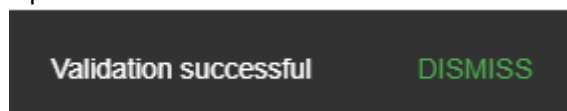

   - Click on Test Connection to ensure handshake is established

   - Upon successful handshake user is notified with a success message

![Taxworks logo]

Steps to configure *Tally SyncApp* with Tally ERP

F. One Time Configuration in SyncApp

1. Navigate to the settings section in SyncApp
2. Enter the registered email id with www.taxworks.in
3. Keep the Taxworks URL as *https://taxworks.in*
4. Enter the tally data access path. Example: *http://localhost:9000*

5. Click on List Companies

   1 Taxworks details

   | suresh@zodhya.com | https://taxworks.in |

   2 Tally details

   | http://localhost:9000 | **List companies** |

6. SyncApp automatically retrieves the active company details from Tally ERP

   3 Company details

Name	Address	GST Number	
Example Company 01	Kannampalayam Village, Sulur, Tamil Nadu, India	33AAACU3303P1ZE	suresh@zodhya.com ▼
Example Company 02	Kannampalayam Village, Sulur, Tamil Nadu, India	33AAACU3303P1ZE	suresh@zodhya.com ▼

7. Click on Save Settings

# Steps to configure *Tally SyncApp* with Tally ERP

F. Start Data Sync from Tally to Taxworks

1. Navigate to the Manual Sync section in SyncApp
2. Specify the Sync Document Range to retrieve the data from Tally
3. Specify the Sync Frequency
   - **Monthly** : Is fast but might affect Tally ERP performance
   - **Daily**   : Is stable and Tally ERP has no performance impact
4. Click on Trigger Sync to start data transfer

5. Data Sync happens for the following data automatically
   - Purchase
   - Sales
   - Debit Note
   - Credit Note
   - Journals (With Tax Rates Only)
6. Sync in progres is displayed as **Sending 1/12 months**
7. Completion is displayed as **Sent 12/12 months**

G. Configure Automated Sync

1. Navigate to the Automated Sync section in SyncApp
2. Define the Sync Period
3. Define Morning Time Sync
4. Define Afternoon Time Sync
5. Based on the defined intervals the Automated Sync starts from current system date documents.