

Integration Initiated from Tally

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TallyPrime can actively initiate communication with external systems, either to **pull data from third-party applications (TPAs)** or **send data to them**, using supported protocols and formats. These workflows enable seamless data sync between Tally and systems like ERPs, CRMs, cloud services, and other databases.

Tally Pulls Data from Third-Party Applications (TPAs)

Tally can act as a client to **fetch external data** using two primary methods:

- **HTTP (XML/JSON over API)**
- **ODBC (SQL-based access to external databases)**

Use Cases

Master Data Sync

- Synchronize **master data** such as **customer records, ledger accounts, or stock items** from an external system (like a CRM, warehouse DB, or another ERP) into **TallyPrime**, using XML and TDL.
- **How It Works:** Tally acts as a **client**, sending a request (if needed), or simply consuming a pre-hosted XML file served from a web server. The response contains structured data (e.g., customer details), which Tally fetches and displays as a report or stores in its database.

Sample Request and Response Formats

```
<CUSTOMER>

  <NAME>Sapna Awasthi</NAME>

  <EMPID>1000</EMPID>

  <PHONE>

    <OFFICENO>080-66282559</OFFICENO>

    <HOMENO>011-22222222</HOMENO>

    <MOBILE>990201234</MOBILE>

  </PHONE>

  <ADDRESS>
```

```
<ADDRLINE>C/o. Info Solutions</ADDRLINE>
<ADDRLINE>Technology Street</ADDRLINE>
<ADDRLINE>Tech Info Park</ADDRLINE>
</ADDRESS>
</CUSTOMER>
```

Corresponding TDL Collection:

[Collection: XML Get Collection]

RemoteURL: "http://localhost/TestXML.xml"

XMLObject: Customer Data

Authentication and Connection Setup

- Host the XML file on a web server (e.g., IIS) with a static IP or localhost URL.
- Place the file under a web-accessible directory such as C:\Inetpub\wwwroot.
- Set collection attributes in TDL to define the connection and request.

TDL Example:

RemoteURL: "http://localhost/TestXML.xml"

RemoteRequest: XMLPostReqRep : ASCII

Error Handling Strategies

- Use the <STATUS> tag in the response to identify success or failure.
- Implement retry or fallback logic using events like On Form Accept.
- Define separate success and error reports using TDL.

TDL Syntax:

Action: HTTP Post : @@MyUrl : ASCII : ReqRep : ERRRespRep : SuccRep

Tally Sends Data to Third-Party Applications (TPAs)

Tally can be configured to **send data proactively** to external systems—either in response to a user action or as part of a scheduled automation.

Use Cases

Auto-Push Vouchers

- Automatically **push approved vouchers** (like sales invoices, payments, or receipts) from **TallyPrime** to an external ERP system, accounting aggregator, or any third-party application—without manual export or file transfer.
- When a voucher is saved or approved in Tally, TDL can be used to **trigger an export** that sends the data to a third-party system in **XML or JSON format** using RemoteRequest.
- This ensures real-time sync between Tally and external platforms like:
 - GST compliance portals
 - Central accounting platforms
 - CRMs or billing systems

Sample Request Payloads

Tally uses RemoteRequest to send data to a third-party system.

XML Payload:

```

<ENVELOPE>
  <HEADER><TALLYREQUEST>Import Data</TALLYREQUEST></HEADER>
  <BODY>
    <IMPORTDATA>
      <REQUESTDATA>
        <TALLYMESSAGE>
          <VOUCHER>
            <DATE>20240601</DATE>
            <AMOUNT>10000</AMOUNT>
          </VOUCHER>
        </TALLYMESSAGE>
      </REQUESTDATA>
    </IMPORTDATA>
  </BODY>
</ENVELOPE>

```

JSON Export Example using TDL:

[Collection: SalesData] Data Source : HTTP JSON : "https://api.example.com/sync"

Export Header : "Authorization: Bearer <token>"

TPA Endpoint Configuration

For reliable data reception:

- The TPA must expose a valid **HTTP endpoint** to receive POST requests.
- Response codes (e.g., 200 OK, 400 Bad Request) must be configured for parsing in TDL.
- JSON/XML schema must match Tally's export format or be normalized at the receiving end.

Acknowledgment and Retry Mechanisms

To ensure reliable delivery:

- Expect and parse confirmation responses from TPAs.
- Implement **retry logic** in TDL using conditional checks on the response.
- Log failed attempts and optionally prompt the user or admin for manual resend.

Whether pulling customer data from a **CRM** or pushing invoices to a billing platform, **TallyPrime** enables **flexible** and **reliable** two-way integration. Its support for **HTTP, XML, JSON, and SQL (ODBC)** allows developers to build **secure** and **structured** automation solutions with clarity and precision.



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