Advico TallySync: Standard Operating Procedure

27 November 2026

1. About this document

Advico TallySync copies your accounting data from TallyPrime to Advico, so AdvicoAI can answer questions about your books. It runs quietly in the background on a Windows PC and keeps the data up to date.

This document is for the person who installs and looks after TallySync at your office, usually the accountant or the IT person. Follow sections 2 to 6 once to set it up. Use sections 7 to 9 afterwards.

TallySync only reads from Tally. It never changes, adds or deletes anything in your books.

2. Before you start

You need all of the following before installing.

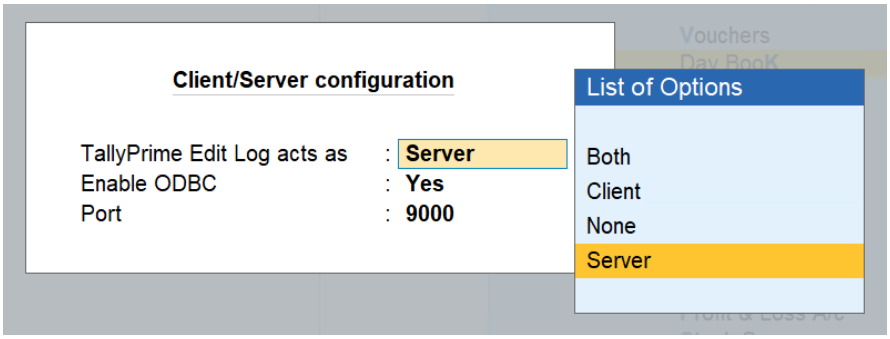
- ☐ A Windows 10 or Windows 11 PC (64-bit) that stays on during working hours. The PC where TallyPrime runs is the best choice.
- ☐ Administrator rights on that PC, to run the installer.
- ☐ A working internet connection.
- ☐ TallyPrime installed and licensed, with your company's data.
- ☐ Your Advico account email and password. If you don't have an account yet, you can create one during sign-in (section 5).
- ☐ The TallySync installer file, `Advico-TallySync-Setup-1.0.0.exe`, provided by Advico.

3. Prepare TallyPrime

TallySync talks to TallyPrime over a connection that must be switched on once in Tally.

1. Open TallyPrime.
2. Press **F1** (Help), then choose **Settings**, then **Connectivity**.
3. Select **Client/Server configuration** and press **Enter**. On the screen that opens, set the **acts as** setting to **Server** (or **Both**). Depending on your edition it is labelled "TallyPrime acts as" or "TallyPrime Edit Log acts as".
4. Check the **Port**. It is normally **9000**. Note the number.

5. Save, and restart TallyPrime if it asks you to.
6. Open the company you want to sync.

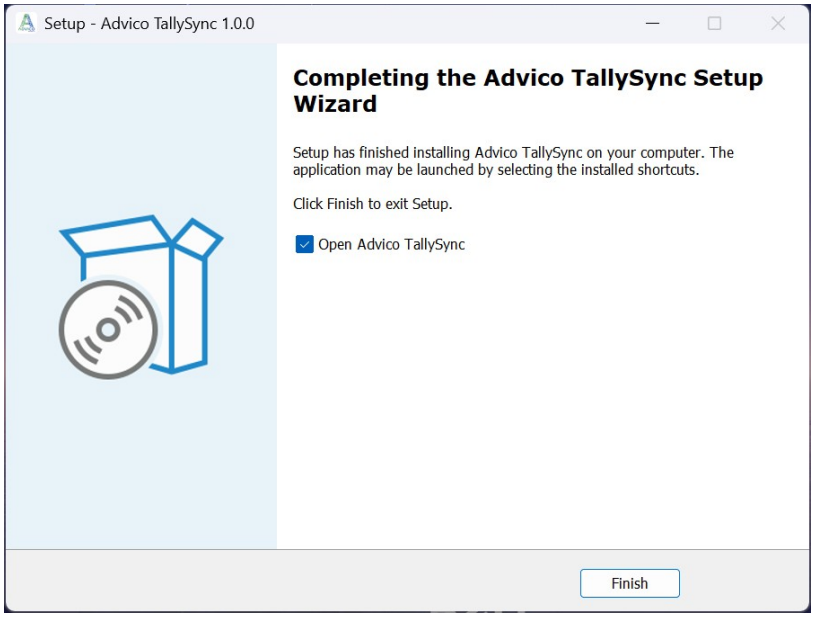


Client/Server configuration in TallyPrime: acts as Server, port 9000

TallyPrime must be running with the company open whenever TallySync syncs. If Tally is closed, TallySync waits and carries on by itself when Tally is opened again.

4. Install Advico TallySync

1. Double-click `Advico-TallySync-Setup-1.0.0.exe`.
2. If Windows asks "Do you want to allow this app to make changes?", choose **Yes**.
3. If Windows shows a blue "Windows protected your PC" screen, see "If Windows shows a warning" below, then continue here.
4. Follow the installer and click **Install**.
5. On the last screen, keep **Open Advico TallySync** ticked and click **Finish**.



The installer's last screen: keep "Open Advico TallySync" ticked and click Finish

After installing:

- The Advico icon appears in the system tray, near the clock. If you don't see it, click the small arrow (^) next to the clock.
- The sign-in window opens.

If Windows shows a warning

Windows may warn you about the installer because it is new to Windows. The installer provided by Advico is safe to run. Only run a file you received directly from Advico.

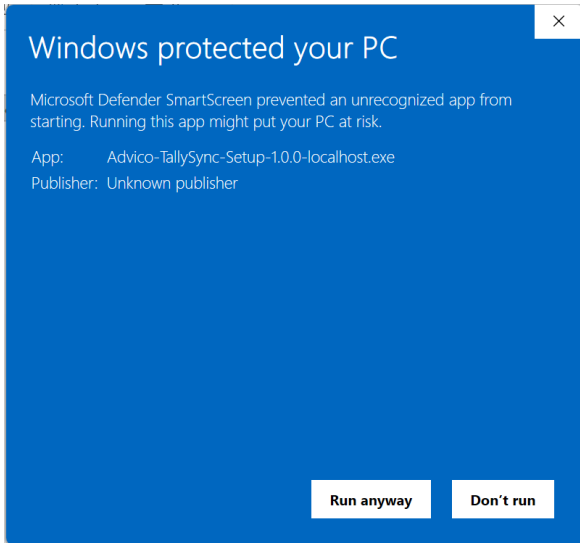
"Windows protected your PC" (blue screen)

1. Click **More info**.



Click "More info"

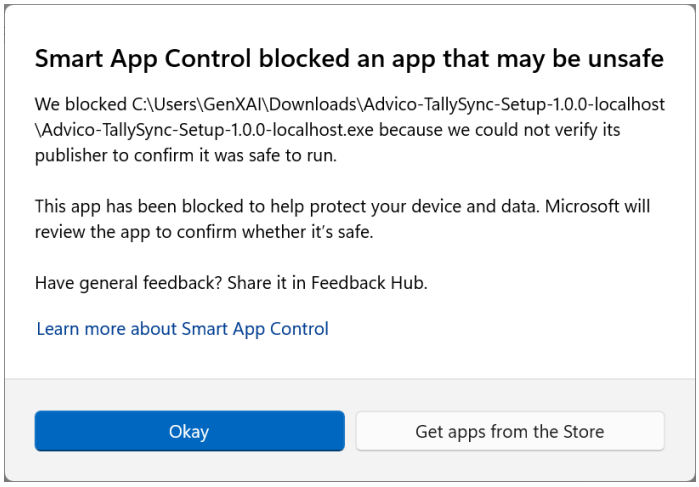
2. Check that **App** shows the Advico TallySync installer, then click **Run anyway**.



Click "Run anyway"

“Smart App Control blocked an app that may be unsafe”

Some Windows 11 PCs have a stricter protection called Smart App Control. It blocks the installer completely and offers no “Run anyway” button.



The Smart App Control message. There is no option to continue

Do not turn Smart App Control off by yourself. On some versions of Windows it cannot be turned on again without resetting Windows, and turning it off lowers the PC’s protection for all apps. Instead:

1. Click **Okay** to close the message.
2. Contact your IT person or Advico support (section 11) and send a screenshot of the message.
3. If your IT person agrees to turn it off: open **Start**, type **Smart App Control**, open its settings, choose **Off**, then run the installer again.

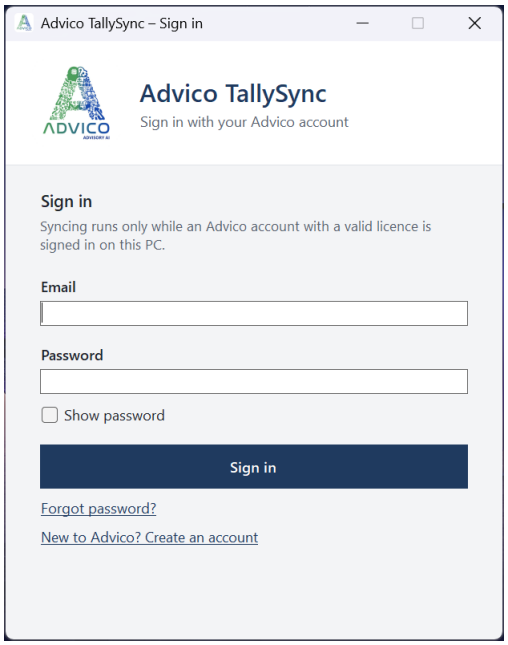
Upgrading: to install a newer version, run the new installer over the old one. You don’t need to uninstall first. Your sign-in, companies and settings are kept.

5. Sign in

Syncing runs only while an Advico account is signed in on this PC.

If you have an Advico account

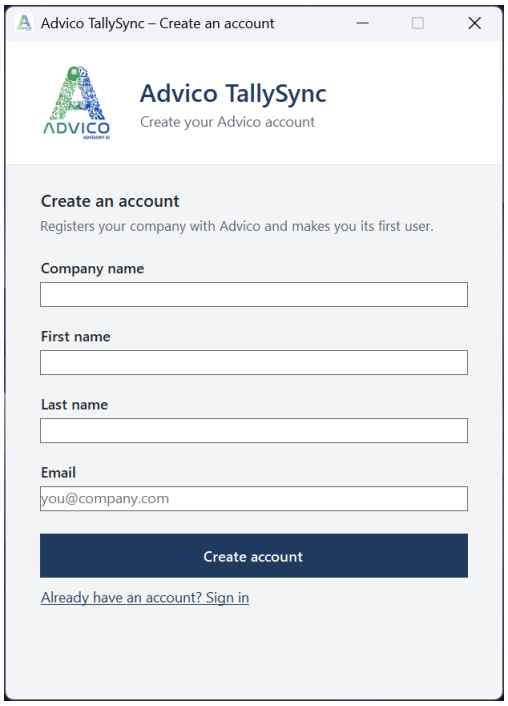
1. Enter your email and password.
2. Click **Sign in**.



The sign-in window

If you don't have an account

1. Click **New to Advico? Create an account**.
2. Fill in the company name, your first name, last name and email.
3. Click **Create account**. You return to the sign-in window with your email filled in.
4. Enter the password for your new account and click **Sign in**.



Create an account

If you forgot your password

1. Click **Forgot password?**
2. Enter your email and click **Send reset link**. The link in the email is valid for 15 minutes.
3. Set a new password, then come back and sign in.

After the first sign-in, the Setup window opens by itself.

6. First-time setup

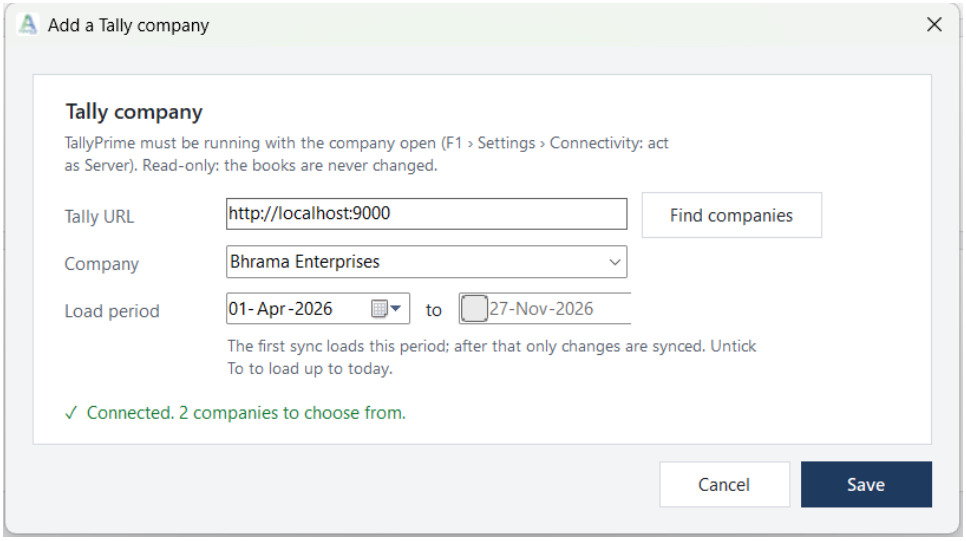
Setup has three steps. Do them in order. You can open Setup again at any time from the tray icon: right-click it and choose **Setup…**

Step 1: Add your Tally company

1. Click **Add company…**
2. In **Tally URL**, enter where Tally runs:
   - Tally on this same PC: `http://localhost:9000`
   - Tally on another PC: `http://` + that PC's address + `:9000`
   - Use your own port number if it is not 9000 (section 3).
3. Click **Find companies**. You should see "Connected" and the number of companies found.
4. Choose your company from the **Company** list.

5. Set the **Load period**: the date from which you want your data in Advico. Leave **To** unticked to load up to today and keep going.
6. Click **Save**.

To sync more than one Tally company, repeat these steps for each. Each company must be open in TallyPrime.



Adding a Tally company: after Find companies, choose the company and the load period

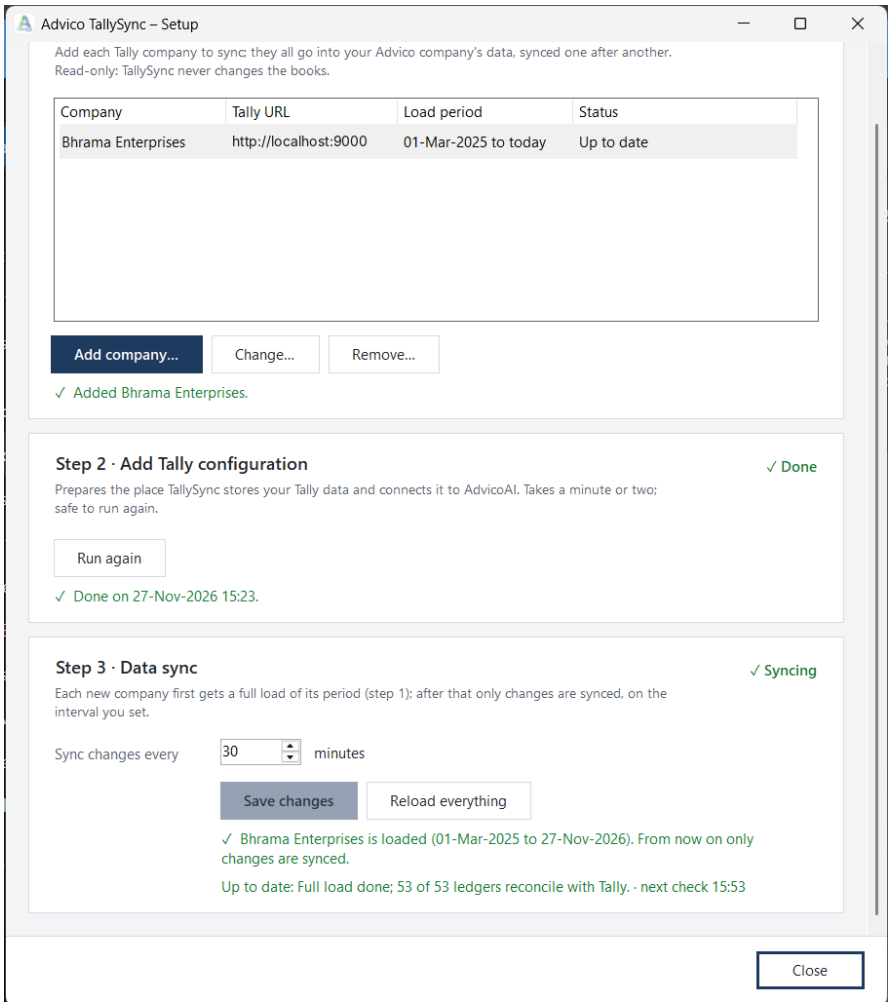
Step 2: Add Tally configuration

1. Click **Add Tally configuration**.
2. Wait for "Done". This takes a minute or two.

This step prepares your Advico workspace for the Tally data and connects it to AdvicoAI. You do it once.

Step 3: Data sync

1. In **Sync changes every**, set how often TallySync checks Tally for changes. The default is 30 minutes.
2. Click **Start syncing**. Once syncing has started, this step shows **Syncing**, and the buttons become **Save changes** (to save a new interval) and **Reload everything**.



Setup with all three steps done

What happens next

- TallySync first does a **full load** of each company for the period you chose. For most companies this takes a few minutes. Large books with many years of data can take longer.
- You can keep working in Tally while it loads.
- When the load is finished, Setup shows that the company is loaded. From then on, only changes are synced.
- The Status and history window becomes available once setup is finished.

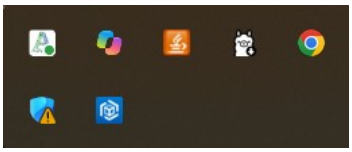
7. Day-to-day use

Once set up, TallySync needs no daily action. It starts with Windows and syncs by itself. This section covers what you can check and change.

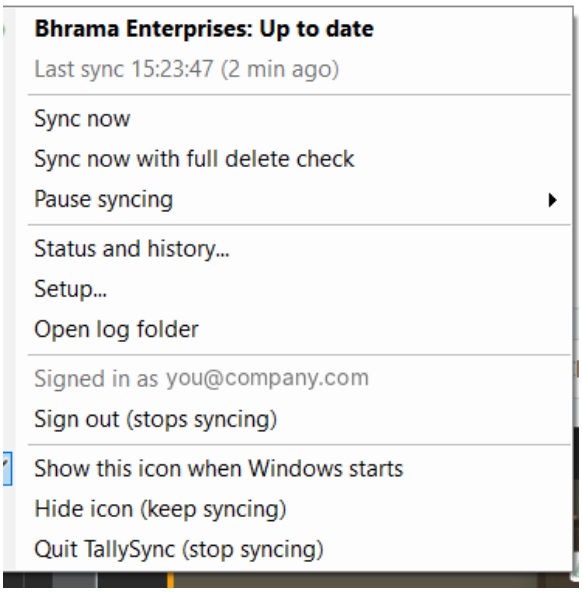
The tray icon

The Advico icon near the clock carries a small coloured dot that shows the current status. Hover over it to read the status, click it to open the main window, or right-click it for the menu.

Status	What it means	What to do
Up to date	Everything is synced; waiting for the next check	Nothing
Syncing	Copying data from Tally now	Nothing
Waiting for Tally	Tally is closed, or the company is not open	Open TallyPrime and the company
Paused	Syncing was paused by a user	Resume when ready
Disconnected	The connection to Advico is lost	Check the internet; it reconnects by itself
Needs attention	A sync failed	See section 9
Setup needed	Setup is not finished	Open Setup and complete the steps
Signed out	No Advico account is signed in	Sign in
Service not running	The background service has stopped	Right-click the icon, **Start the TallySync service**



The Advico icon in the system tray (top left), with its green status dot



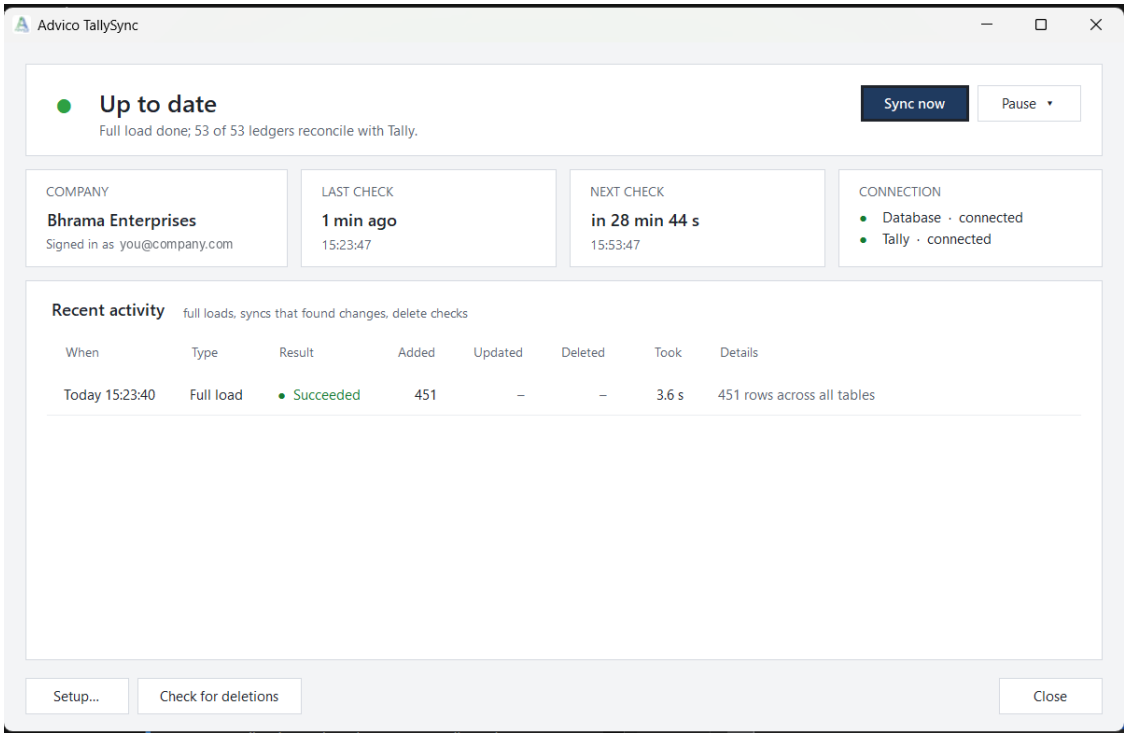
The menu that opens when you right-click the icon

Status and history window

Right-click the tray icon and choose **Status and history…** It shows:

- The current status, the last check and when the next check is due.
- Whether Tally is connected.
- Each Tally company and its state.
- Recent activity: full loads, syncs that found changes, and deletion checks.

This window opens only after setup is finished. Before that, Setup opens instead.



The Status and history window

Sync now

To sync immediately instead of waiting, click **Sync now** in the Status window, or choose it from the tray menu.

Pause and resume

1. Right-click the tray icon and choose **Pause syncing**, or use **Pause** in the Status window.
2. With several companies, pick one company or **All companies**.
3. Choose **For 30 minutes**, **For 2 hours** or **Until I resume**.

To start again, choose **Resume syncing**. Changes made in Tally while paused are picked up after you resume.

Add another Tally company

Open **Setup…**, click **Add company…** in step 1 and follow section 6, step 1. The new company gets its own full load, then syncs with the others.

Change a company's Tally URL or load period

1. Open **Setup…** and select the company in step 1.
2. Click **Change…**, edit the Tally URL or the load period, and click **Save**.
3. If you changed the period, TallySync asks whether to reload the company for the new period. Choose **Yes**.

Reload a company

Reload loads all of a company's data again from Tally. Use it if the data in Advico looks incomplete, or when Advico support asks you to.

1. Open **Setup…** and select the company.
2. Click **Reload** and confirm.

Remove a company

Warning: removing a company stops its sync and deletes all its data from Advico. AdvicoAI will no longer see it. Nothing changes in Tally.

1. Open **Setup…** and select the company.
2. Click **Remove…** and confirm.

To get the company back later, add it again. It is then loaded from the start.

Sign out, or sign in with a different account

- Right-click the tray icon and choose **Sign out (stops syncing)**. Syncing stops until someone signs in again.
- Each Advico account has its own list of Tally companies. If a different account signs in, it starts with an empty Setup and must add its own companies.
- When the first account signs in again, its companies and sync continue as before.

Restarts and closing Tally

- **PC restarted:** TallySync starts by itself. Open TallyPrime and the company, and syncing continues.
- **Tally closed:** the status shows "Waiting for Tally". Syncing continues when Tally is open again.
- **Hide icon (keep syncing):** removes the tray icon only. Syncing carries on.
- **Quit TallySync (stop syncing):** stops syncing. Use it only if you mean to stop.

8. What gets synced

TallySync copies the following from each Tally company, for the load period you chose.

- **Masters:** ledgers, groups, stock items, stock groups and categories, godowns, cost centres and voucher types.
- **Vouchers:** sales, purchases, receipts, payments, journals, credit and debit notes and the rest, with their ledger and stock lines.
- **Bills and banking:** bill-wise details, opening bills and bank details of vouchers.
- **Balances and reports:** ledger balances, stock balances, trial balance, profit and loss, and balance sheet, as Tally calculates them.
- **GST:** your GSTIN, GST rates of stock items, GST on each invoice line, and e-Invoice (IRN) and e-Way Bill numbers.

How often

- New and changed entries are picked up at every check, on the interval set in Setup (30 minutes by default).
- Vouchers deleted in Tally are removed from Advico too. A full deletion check runs by itself once a day. To run it at once, click **Check for deletions** in the Status window.

Payroll and attendance vouchers are synced as entries only, without employee-level details.

9. Troubleshooting

Try the steps below first. If the problem stays, contact support (section 11).

Problem	Likely cause	What to do
Status shows “Waiting for Tally”	TallyPrime is closed, or the company is not open	Open TallyPrime and open the company. Syncing continues by itself.
Find companies shows an error or no companies	Tally’s server setting is off, the port is different, or the URL is wrong	Check section 3. Confirm the port number and that the company is open. If Tally is on another PC, check that PC is on and reachable.
My company is not in the Company list	The company is not open in TallyPrime	Open it in TallyPrime, then click **Find companies** again.
Sign-in fails	Wrong email or password, or no internet	Check the internet connection. Use **Forgot password?** to reset the password.
Status shows “Needs attention”	A sync failed, often because Tally was closed or busy during the sync	Make sure Tally is open with the company, then click **Sync now**. If it fails again, contact support.
Status shows “Setup needed”	A setup step is not finished	Open **Setup…** and complete the step it names.

Problem	Likely cause	What to do
Status and history does not open; Setup opens instead	Setup is not finished for the signed-in account	Complete all three steps in Setup.
Status shows “Disconnected”	No internet, or Advico cannot be reached	Check the internet. TallySync reconnects by itself.
Status shows “Service not running”	The background service has stopped	Right-click the tray icon and choose **Start the TallySync service**. If it does not start, restart the PC.
Data in Advico looks old	Syncing is paused, Tally is closed, or the user is signed out	Check the status on the tray icon and act as in section 7. Then click **Sync now**.
Entries from some months are missing	Those months are outside the company’s load period	In Setup, select the company, click **Change…**, widen the load period and reload.
Setup is empty after signing in	A different Advico account is signed in	Sign in with the account that set up the companies, or add the companies for this account.
Windows shows “Windows protected your PC” when installing	The installer is new to Windows	Click **More info**, then **Run anyway** (section 4).
Windows shows “Smart App Control blocked an app”	Smart App Control is on and blocks the installer	Do not turn it off yourself. Contact your IT person or Advico support (section 4).
The tray icon is missing	It is hidden by Windows, or was hidden from the menu	Click the arrow (^) near the clock. If it is not there, open **Advico TallySync** from the Start menu.
The old logo still shows after an upgrade	Windows is showing a saved copy of the icon	Sign out of Windows and back in, or restart the PC.

10. Do’s and don’ts

Do

- Keep TallyPrime running with the company open during working hours.
- Keep the PC on and connected to the internet.
- Check the tray icon now and then. “Up to date” or “Syncing” means all is well.
- Install new versions over the old one when Advico sends them.

Don’t

- Don’t remove a company unless you want its data deleted from Advico.
- Don’t choose **Quit TallySync** or sign out unless you mean to stop syncing.

- Don’t change the Tally port or server setting without updating the Tally URL in Setup.
- Don’t share your Advico password. Each person should use their own account.

11. Support

Email: advico.support@genxai.com

When you report a problem, include:

- Your company name and the Tally company affected.
- What you were doing and what you saw, with the exact message if there was one.
- The date and time it happened.
- A screenshot of the Status and history window, or of the Setup window if setup is the problem.

Support may ask for the log files. To find them, right-click the tray icon and choose **Open log folder**.

12. Quick reference

Set up once

1. In TallyPrime: F1, Settings, Connectivity, Client/Server configuration, act as Server, port 9000. Open the company.
2. Run the installer.
3. Sign in with your Advico account.
4. Setup step 1: **Add company…**, enter the Tally URL, **Find companies**, pick the company and load period, **Save**.
5. Setup step 2: **Add Tally configuration**, wait for “Done”.
6. Setup step 3: set the interval, **Start syncing**.

Every day

- Keep TallyPrime open with the company.
- Look for “Up to date” or “Syncing” on the tray icon.

Common actions

I want to	Where
See the status	Hover over or click the tray icon
Sync right now	Tray menu or Status window, **Sync now**
Pause or resume	Tray menu, **Pause syncing** / **Resume syncing**
Add, change, reload or remove a company	Tray menu, **Setup…**, step 1

I want to	Where
Change how often it syncs	**Setup…**, step 3
Get help	advico.support@genxai.com