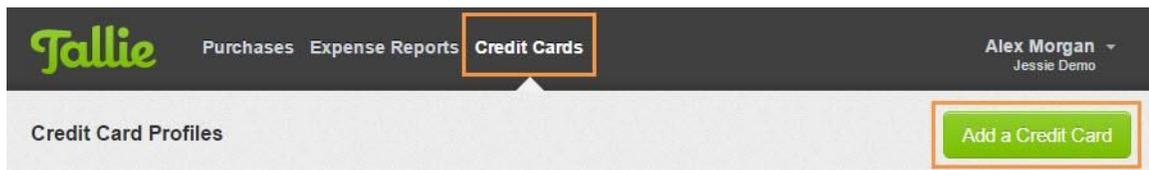




Linking a Credit Card with Tallie

Tallie can be used to automatically import your credit card transactions to help keep track of your expenses. This guide will demonstrate how to link credit cards to your account.

1. To set up auto-import, click on the **Credit Cards** tab and select **Add a Credit Card**.



2. Search for your bank by typing in the **name of the bank** or the **sign-in URL**, or select from the popular banks below.

The screenshot shows the 'Add a Credit Card' form. It has a search input field labeled 'Bank Name or URL'. Below the search field, there is a list of popular banks with their corresponding sign-in URLs. The list includes:

Bank Name	Sign-in URL
PEX CARD	PEXCARD.COM
WELLS FARGO - CREDIT CARD	WELLSFARGO.COM
SILICON VALLEY BANK	SVB.COM
CITIBANK CREDIT CARD	ONLINE.CITIBANK.COM
CHASE - CREDIT CARD	CHASE.COM
CAPITAL ONE CREDIT CARD	CAPITALONE.COM
BANK OF AMERICA - CREDIT CARD	BANKOFAMERICA.COM
BANK OF AMERICA - BANK	BANKOFAMERICA.COM
AMERICAN EXPRESS	AMERICANEXPRESS.COM

At the bottom of the form, there is a link: 'Can't find your bank? [Create a card profile manually.](#)'

3. Enter your user-specific **login credentials** for your online banking and click **Sign In**. (Note: The required information may vary by bank)

A screenshot of the 'Add a Credit Card' form in the Tallie application. The form is titled 'Add a Credit Card' and has a close button (X) in the top right corner. It features a search bar with 'American Express' and 'americanexpress.com' entered. Below the search bar, it asks for login credentials with fields for 'User ID' and 'Password'. There are two checkboxes: 'Company pays this card (non-reimbursable)' labeled 'a' and 'Auto import this card' labeled 'b'. A green box contains the text 'Your credentials are safe with us.' followed by two lines of explanatory text. At the bottom, there are 'Back', 'Cancel', and 'Sign In' buttons.

- a. If this is a company card, check this box.
 - b. Check this box if you would like all transactions from your statement to be automatically created as expenses in Tallie. We recommend enabling this after the connection establishes.
4. Once the connection is made, you will be presented with the available card. When you're ready, click **Add to Tallie** to import the selected cards.
 5. And that's it! Your bank has been connected successfully and you can begin importing transactions.