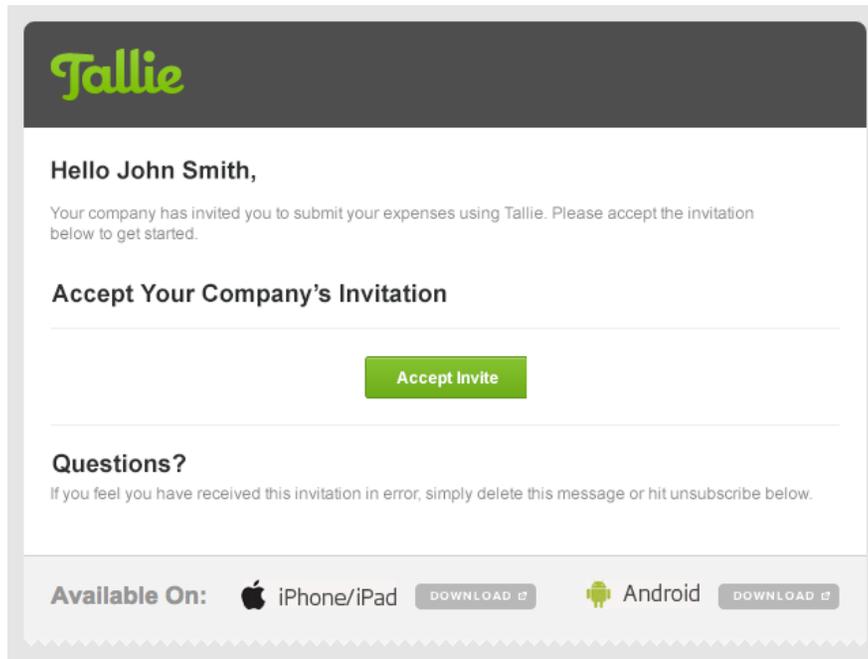


# Tallie

Get Started Guide

# 1. Welcome to Tallie!



## Accept Your Invitation

1. Log in to your email account.
2. Open the Tallie email "You've Been Invited to Use Tallie."
3. Accept the invite and create a password for your account.



## Tallie's Log In Page

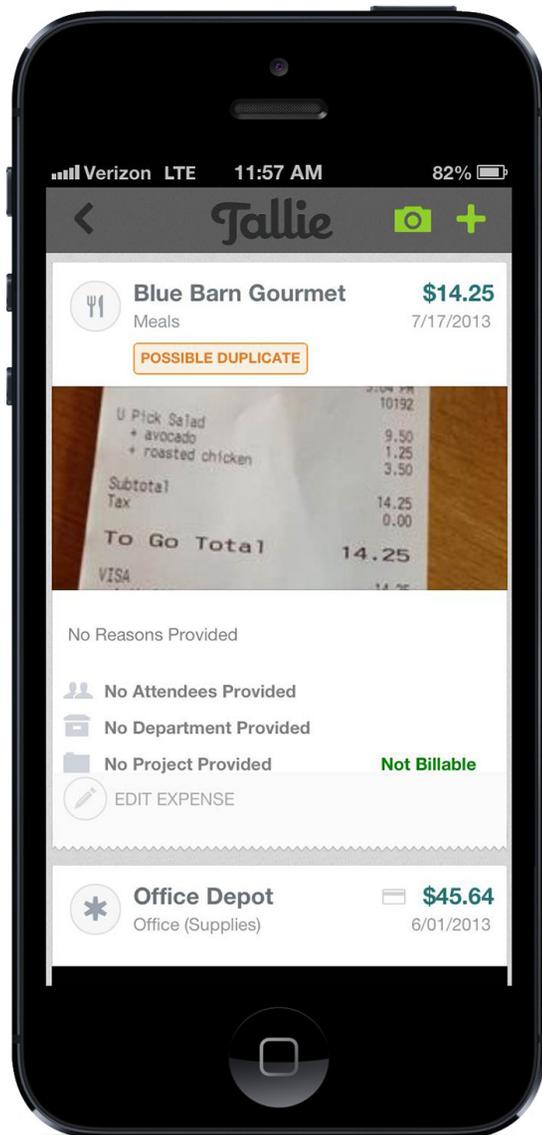
1. Open a web browser (we recommend Chrome or Firefox).
2. Bookmark this link:  
[usetallie.com/sso/](https://usetallie.com/sso/)

## Need Help?

We have a team of Product Experts ready to help answer any question!

Online: [support.usetallie.com](https://support.usetallie.com)  
By Phone: 888-874-1118 ext. 2  
By Email: [support@usetallie.com](mailto:support@usetallie.com)

## 2. Download the Mobile App



*Use the Tallie app to take a photo of your receipt and upload the dollar amount, merchant, and date information into your account instantly!*

### iOS Devices

1. Download the Tallie app from the iTunes App Store by searching for "Tallie."



2. Click "Open" or tap the Tallie icon on your home screen.
3. At the log in screen, enter your Tallie credentials.

### Android Devices

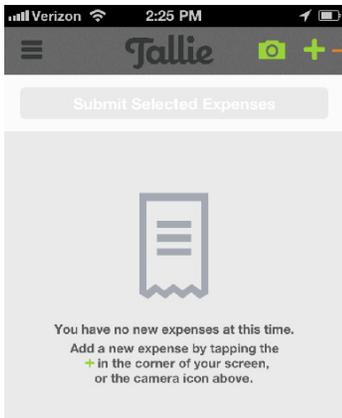
1. Download the Tallie app from Google Play by searching for "Tallie."



2. Click "Open" or tap the Tallie icon on your home screen.
3. At the log in screen, enter your Tallie credentials.

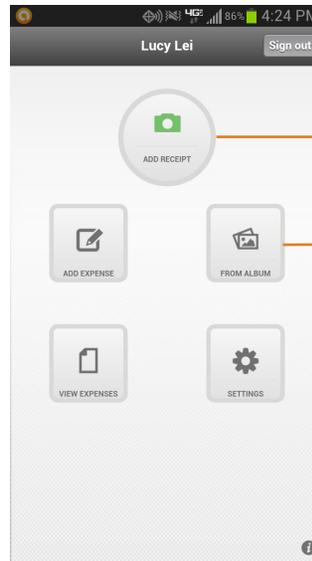
### 3. Adding Expenses — Mobile

*By using the Tallie App to take a photo of your receipt, you are able to import the dollar amount, merchant, and date information into your account instantly!*



#### Via iOS Devices

1. Open the Tallie app on an iPhone or iPad to snap and upload a picture of a receipt at the point-of-purchase.
2. You can add expenses manually by clicking on the green plus sign and selecting a category.



#### Via Android Devices

1. Open the Tallie app on your Android smartphone or tablet, and click “Add Receipt” to take a new photo.
2. Click “From Album” to upload a receipt photo from your gallery.

## 4. Adding Expenses — Desktop

All expenses imported into Tallie are automatically scanned for merchant, date, and price. That means you'll spend less time on data entry!

### Add New Expense

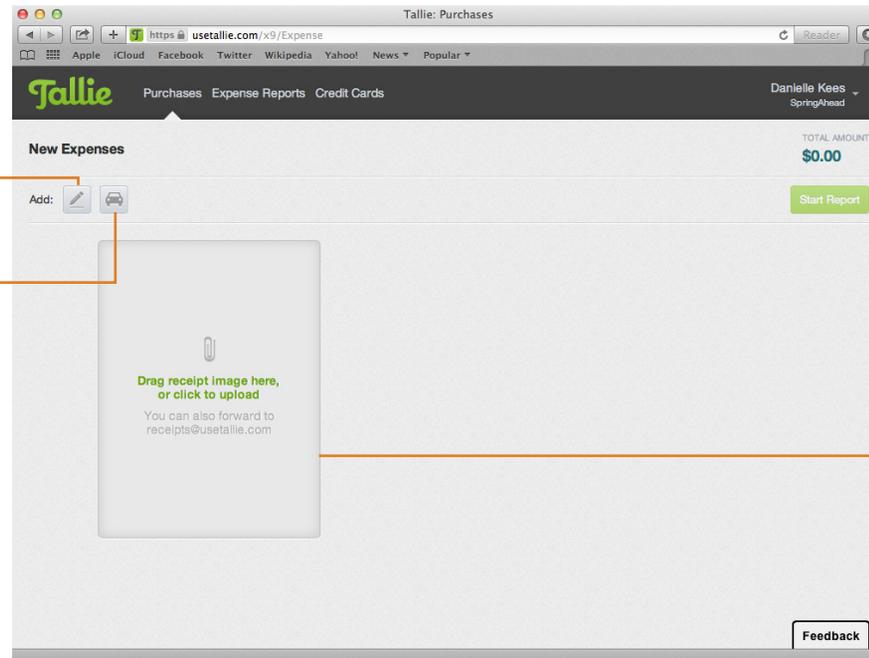
### Add New Mileage



### Add New Credit Card Expense

If a credit card is connected to your account, a third "add" button will appear.

Learn how to Link a Credit Card on PAGE 6



### Email

From an email address that is linked to your Tallie account (login name), attach and send receipt images to [receipts@usetallie.com](mailto:receipts@usetallie.com).

If you've received email receipts from e-commerce merchants, you can also forward an email to [receipts@usetallie.com](mailto:receipts@usetallie.com).

### Drag & Drop

If you have receipt images on your computer, the images can be intuitively dragged & dropped from your desktop into your Tallie account.

# 5. Adding Expenses — Credit Card

Tallie can be used to automatically or manually import credit card transactions to help keep track of your expenses.

**Enter your bank's name:**

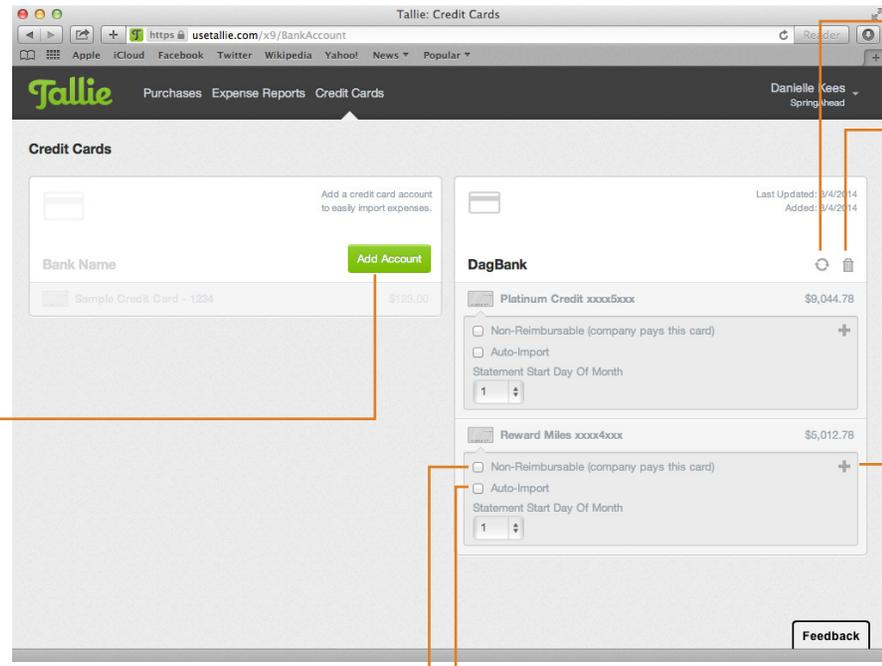
or... Chase, Bank of America or www.citibank.com

**Or choose from these popular banks:**

- Wells Fargo - Credit Card [www.wellsfargo.com](#) • Wells Fargo - Bank [www.wellsfargo.com](#)
- Discover Card [www.discover.com](#) • Cit Credit Cards online [citibank.com](#)
- Chase - Credit Card [www.chase.com](#) • Capital One Credit Cards [www.capitalone.com](#)
- Capital One 360 - Bank home [capitalone.com](#) • Bank of America - Credit Card [www.bankofamerica.com](#)
- Bank of America - Bank [www.bankofamerica.com](#) • American Express Cards [www.americanexpress.com](#)

## Add an Account

Type in your bank's name or URL, and enter your user-specific login information for your online banking. Some banks may ask a security question.



**Refresh Account**

**Delete Account**

**Import Transaction**

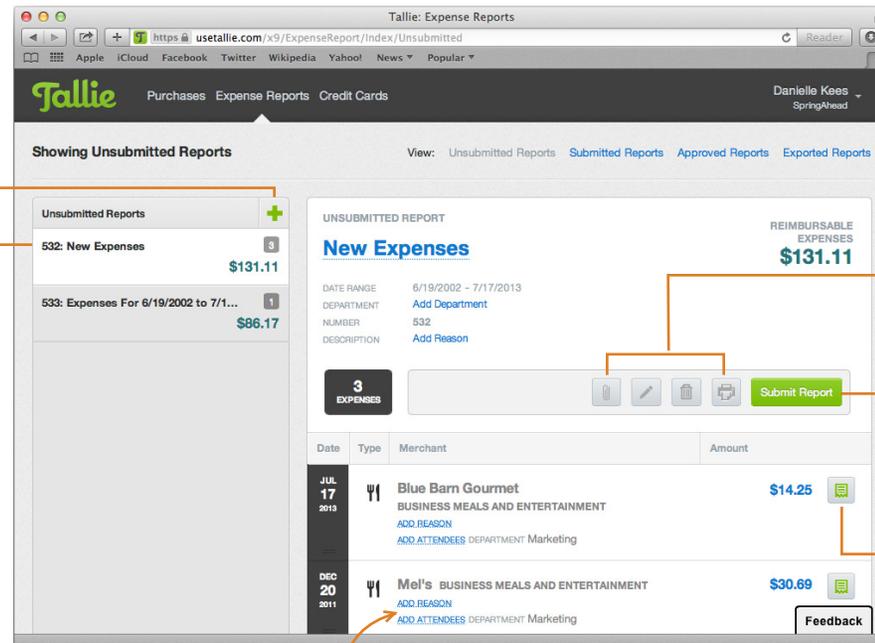
Click the plus sign to import individual transactions associated with a credit card. Once imported, the transaction will appear on your Purchases page.

**Automatically Import All Transactions**  
**Select as a Corporate Card**

## 6. Submitting for Approval

Tallie will automatically generate expense reports for you to submit, or you can choose to create your own custom reports from any imported expenses.

**Create New Report**  
**List of Reports**



**Edit Report**

Attach a new receipt, edit, delete the entire report (including the individual expenses), and print.

**Submit to Approver**  
**View Receipt**

You can click any link on the report to edit the report or any of the individual expenses.

## 7. After Submitting a Report

*Interested in learning more about Tallie? Here are some additional advanced features you will be able to utilize as an approver or manager.*



### **Approval Management**

Build chains based on project, department, or spend.

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### **Flexible Integrations**

Transfer data to accounting systems and map to dimensions.

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### **Data Analytics**

Visualize data, such as accrual reports & credit card reconciliation.