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.

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