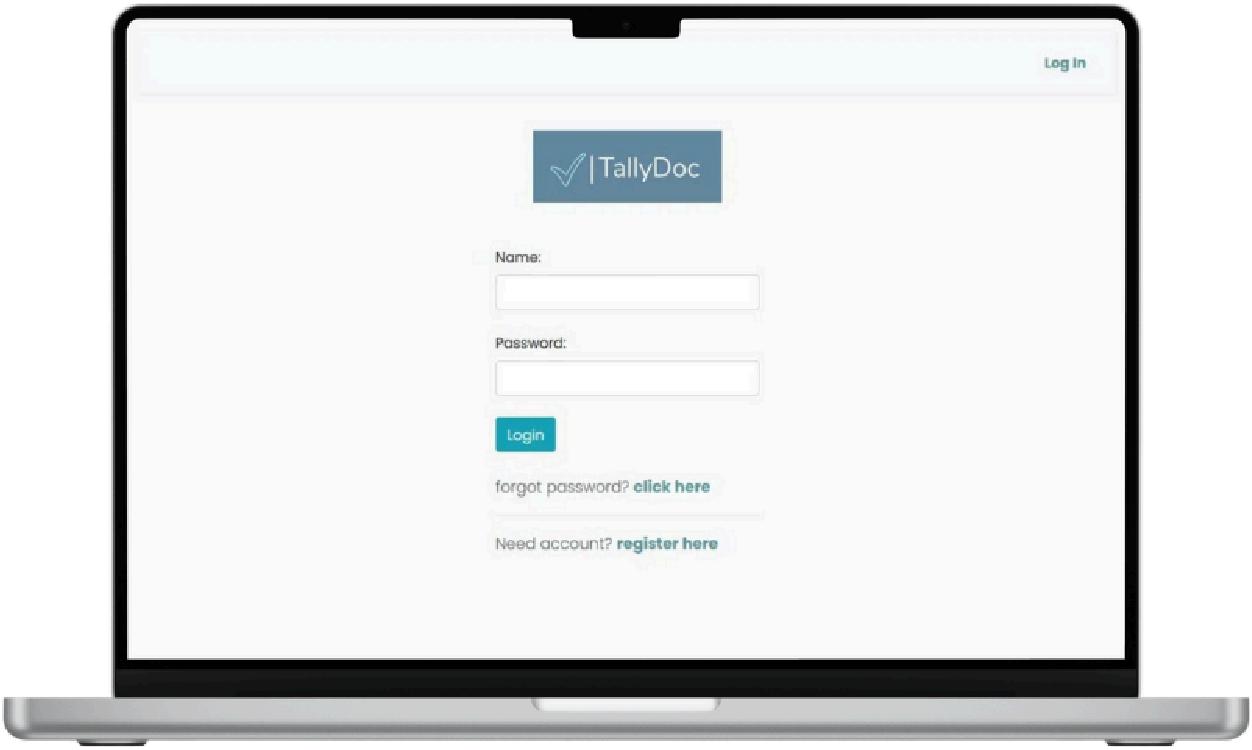
User Guide



Product Overview

TallyDoc is an online invoice generator software designed to help you streamline your invoicing process. With TallyDoc, you can create professional invoices and estimates, link to your preferred payments app, track payments (optionally), and manage your customer contact information efficiently.

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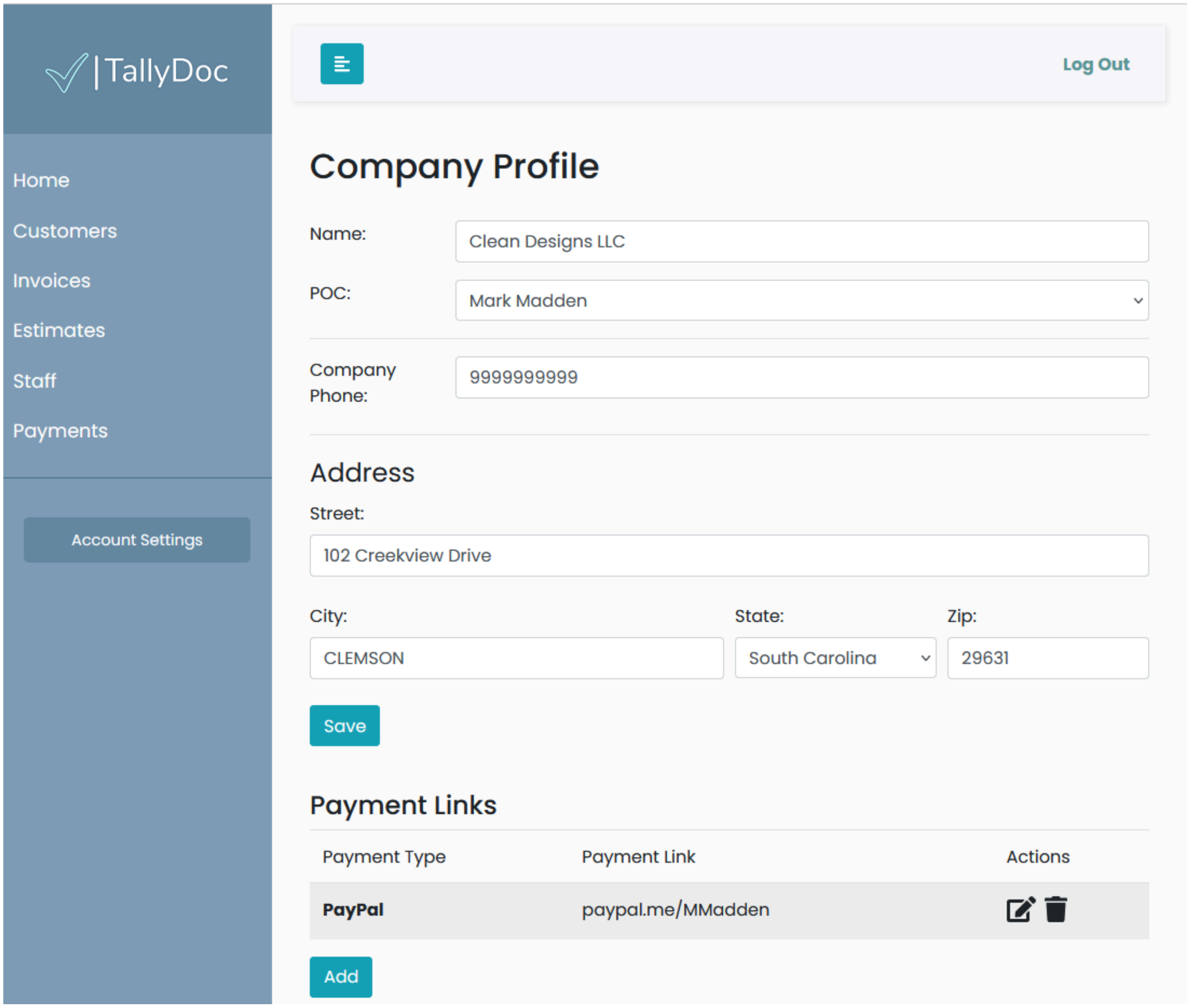
Getting Started

Company Profile:

After selecting a subscription plan at tallydoc.com and following the self-service registration steps, you can log in to TallyDoc automatically from the registration screen.

Upon login, your company profile page will be presented:



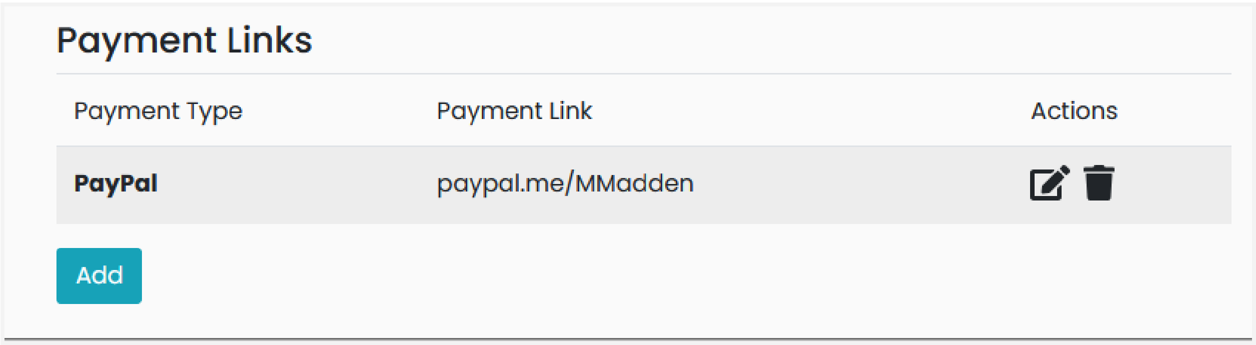
*example company profile shown.

Ensure your company information is accurate before proceeding.

Your company information is crucial because **it will be displayed on your invoices!**

Payment Links

You'll see a section for Payment Links at the bottom of the **company profile** page. These are any/all of your preferred payment options (ex. Apple Pay, Google Pay, PayPal, Venmo, etc.).

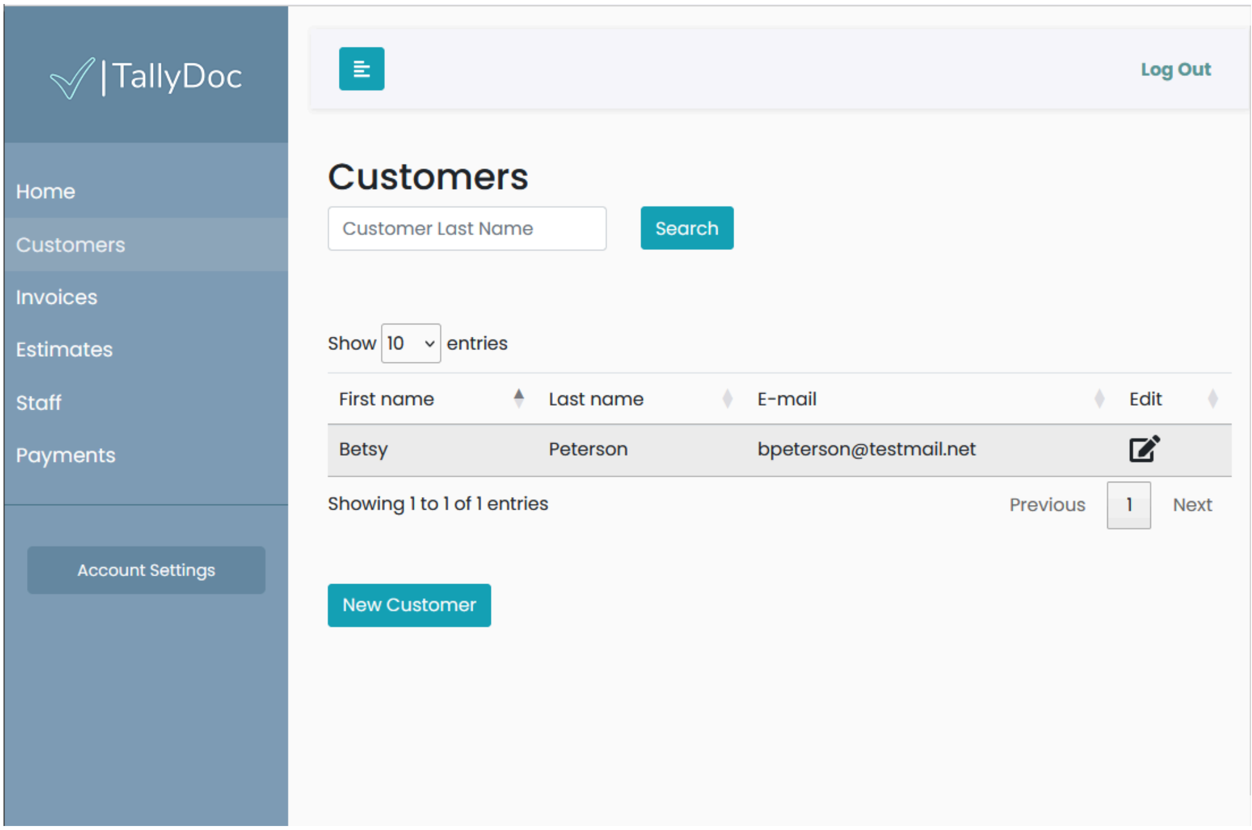


*example PayPal payment link.

The Payment Links section is most applicable to a subscription plan **without** payment processing included. It is a simple way to provide your customers with your preferred payment platform directly from their invoices!

Customers

TallyDoc is a great tool for managing your customer's contact information. Clicking the **Customers** link on the left-hand navigation menu will display a list of customers:

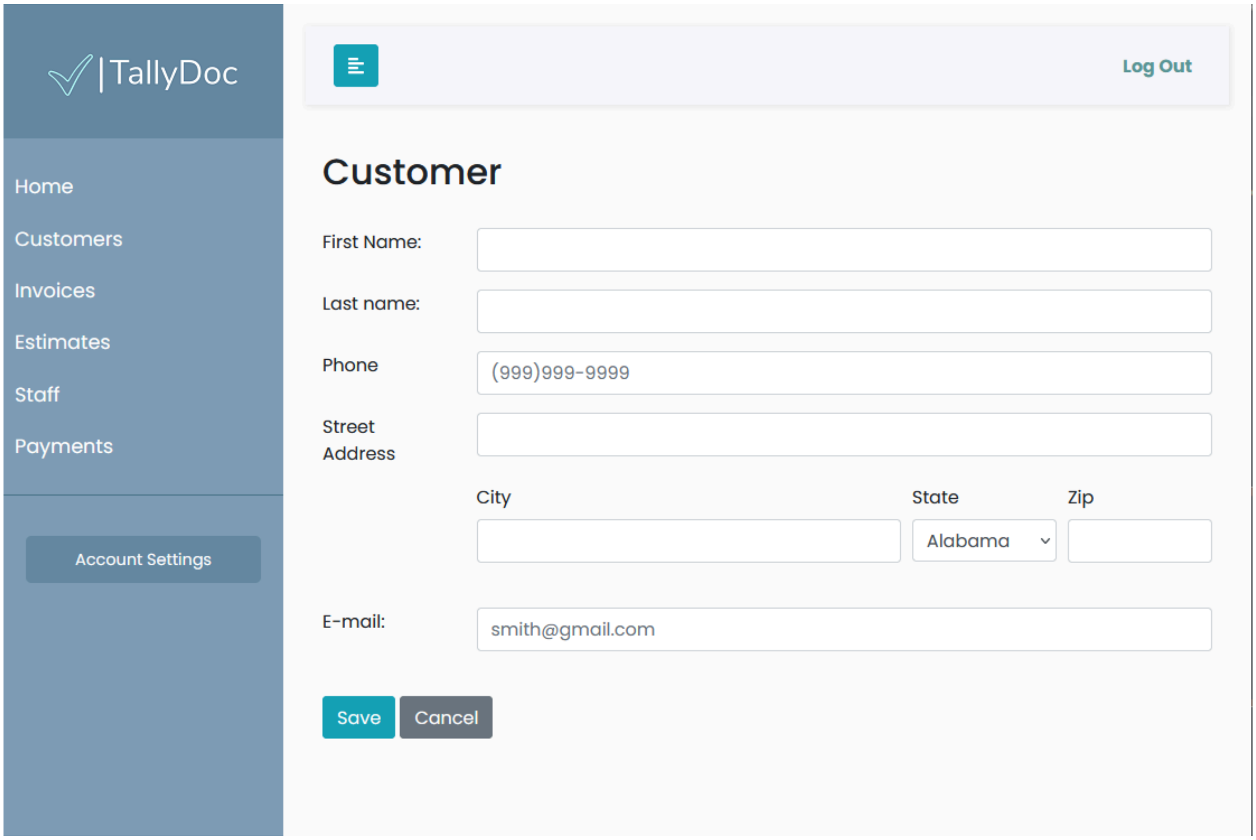


*example customers list shown.

From the customer list, you can edit any existing entries by clicking on the Edit icon ( ) on the right-hand side of the list, and you may add new customers by clicking the **New Customer** button.

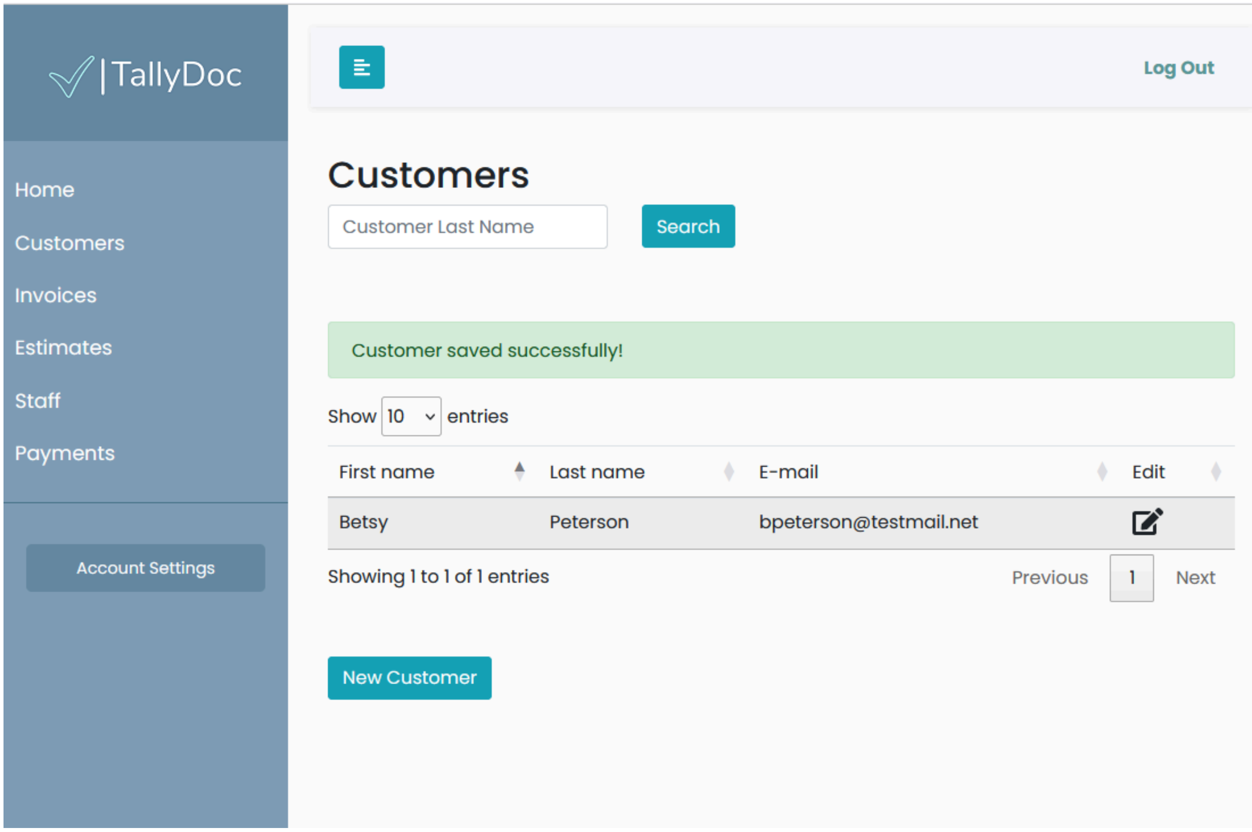
Add a Customer

To add one of your customers, click the **New Customer** button (as described above), and enter the required information (phone number is optional).



*The new customer form is shown.

Add your customer information and click **Save**.



*example customer is shown.

Follow this process for all of your customers.

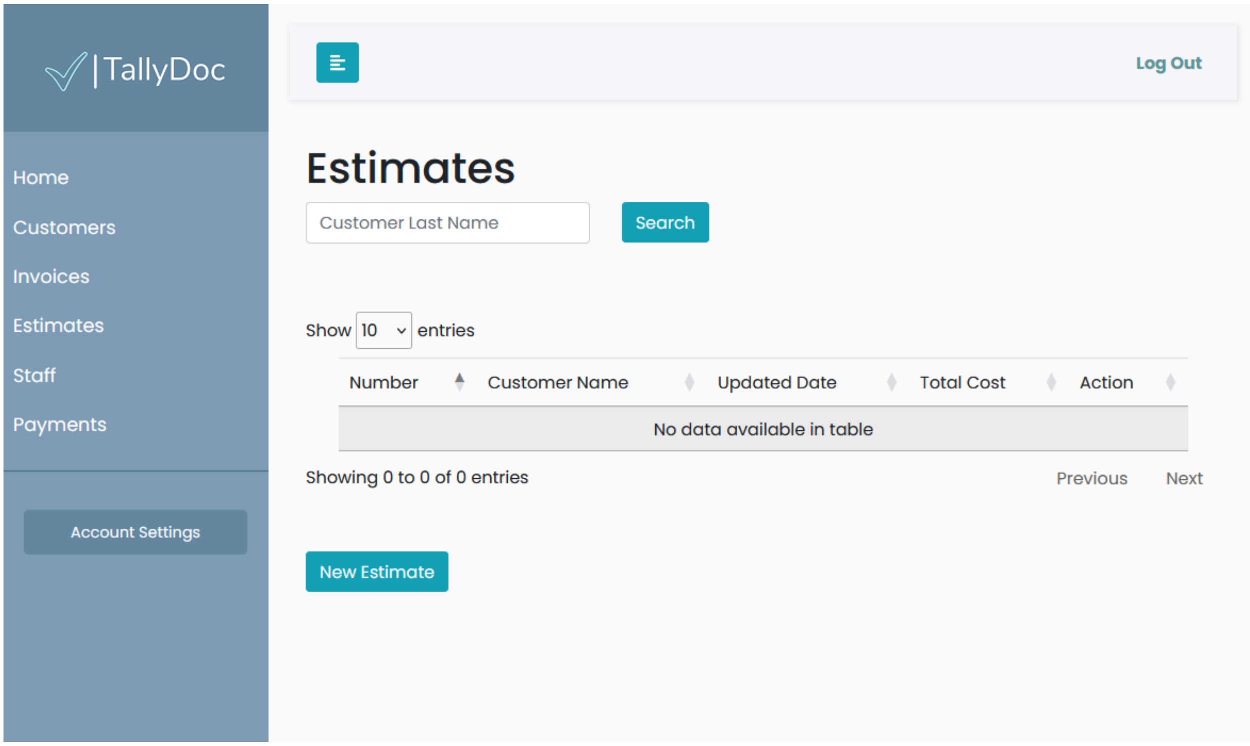
*Optionally contact us to import your customers for you. (enabled for certain subscriptions).

Estimates

Creating an estimate is often helpful to provide a customer with before proceeding with any work. Estimates are a good idea because they are a professional and official way of declaring your intent and being transparent about pricing.

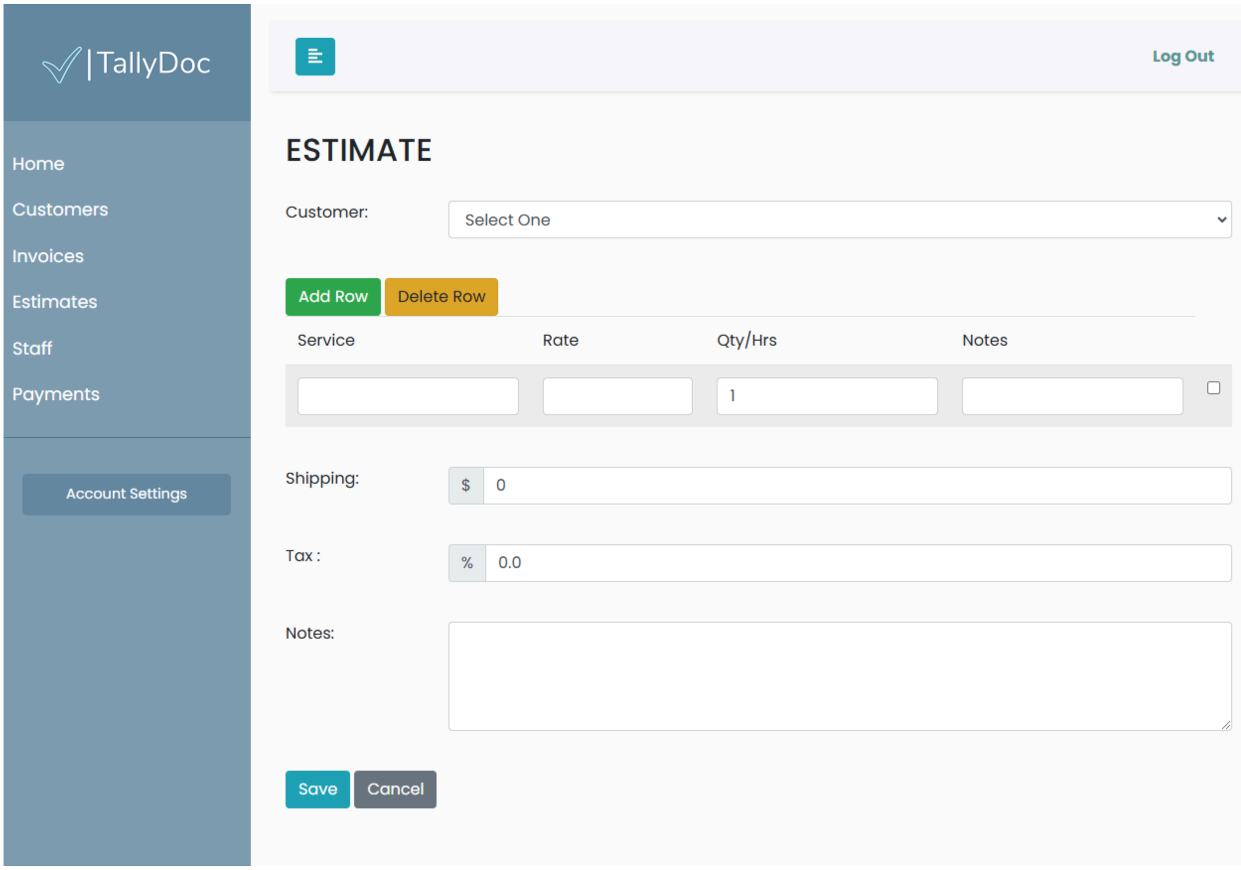
Create an Estimate

Creating an estimate in TallyDoc is very simple. To get started, click the **Estimates** link in the left-hand navigation menu. You'll be presented with a list of your previously created estimates (if any).



*empty estimates list shown.

To create a new estimate, click the **New Estimate** button.



*The new estimate form is shown.

The Estimate form contains sections for the following:

Customer: Select your previously created customer(s) from the drop-down menu.

Line Items: These are the individual items that combine to make up the estimate. List each item on a new line by clicking the **Add Row** button. Be specific, and use the notes field to elaborate on a line item.

Shipping: Only necessary if providing a product to a customer via a shipping provider. For a service provided, leave as $0.

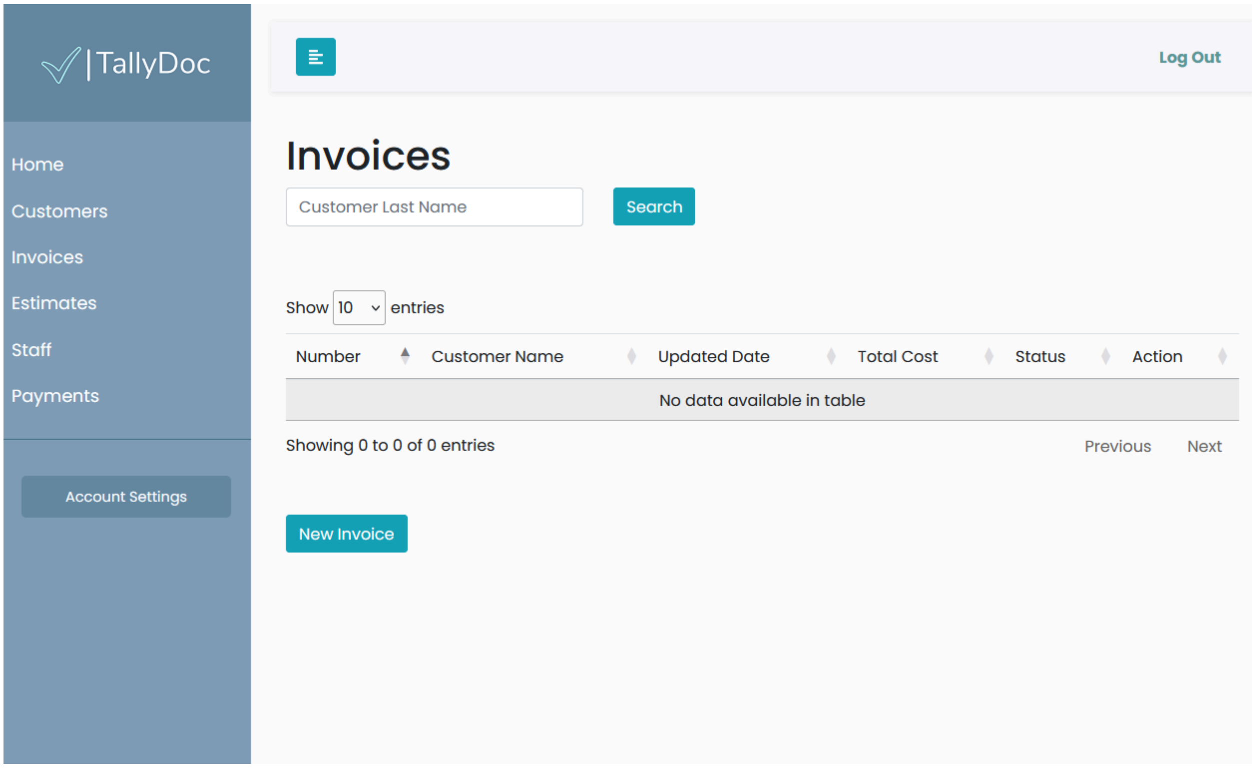
Tax: Optional, at your discretion. See your local state laws.

Notes: The notes section is useful for leaving any additional information not captured anywhere else on the form, such as the date the work will be performed, and adding additional contact information or related messages.

Save your new estimate by clicking the **Save** button.

Invoices

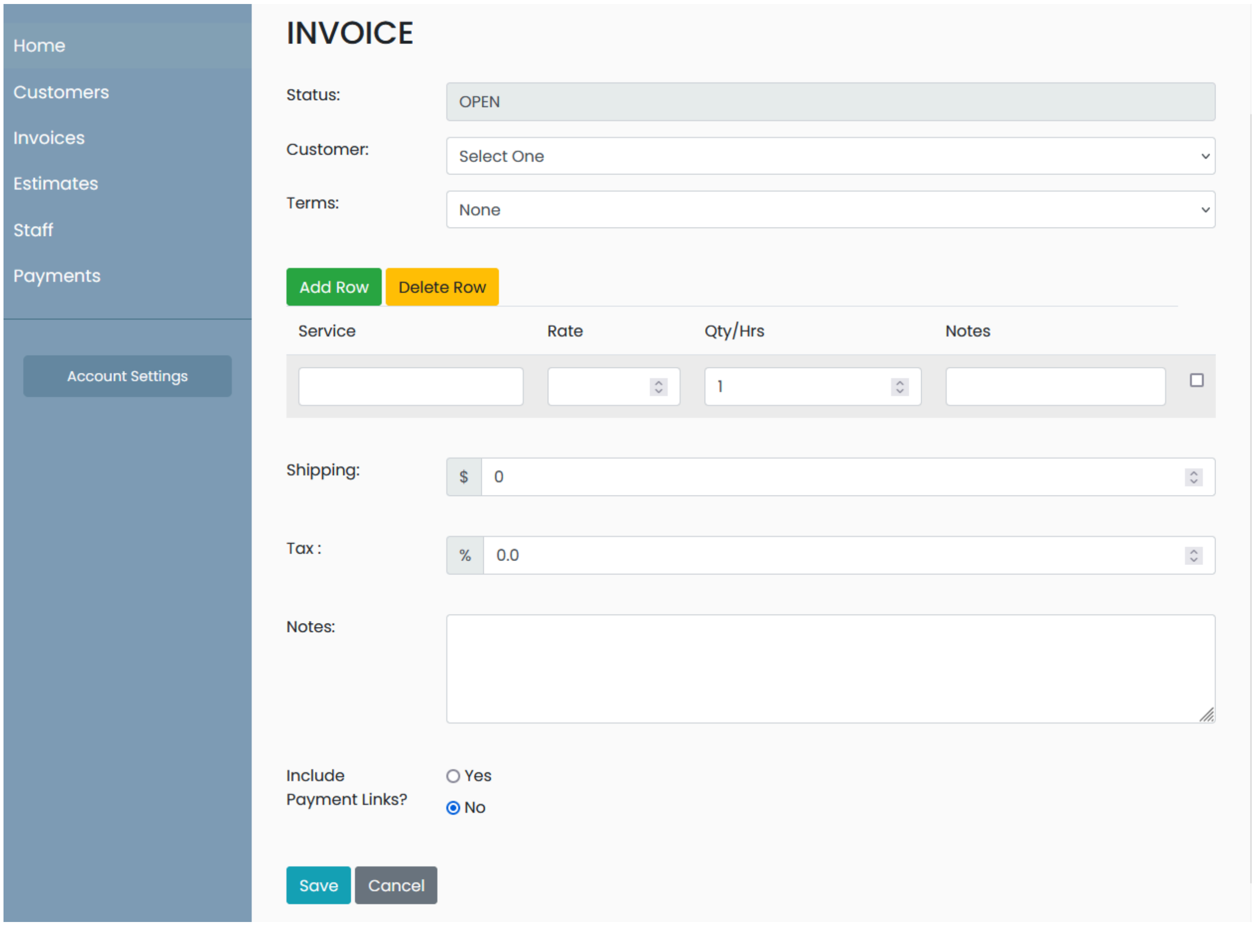
Invoices are your ticket to getting paid, organizing your revenue, and keeping an audit trail of your business. TallyDoc is primarily an invoice management software. To get started, click the **Invoices** link in the left-hand navigation menu. You'll be presented with a list of your previously created invoices (if any).



*empty invoices list shown.

Create an Invoice

To create an invoice, click the **New Invoice** button from the Invoices list screen (shown above).



*The new invoice form is shown.

The Invoice form contains sections for the following:

Customer: Select your previously created customer(s) from the drop-down menu.

Line Items: These are the individual items that combined make up the invoice. List each item on a new line by clicking the **Add Row** button. Be specific, and use the notes field to elaborate on a line item.

Shipping: Only necessary if providing a product to a customer via a shipping provider. For a service provided, leave as $0.

Tax: Optional, at your discretion. See your local state laws.

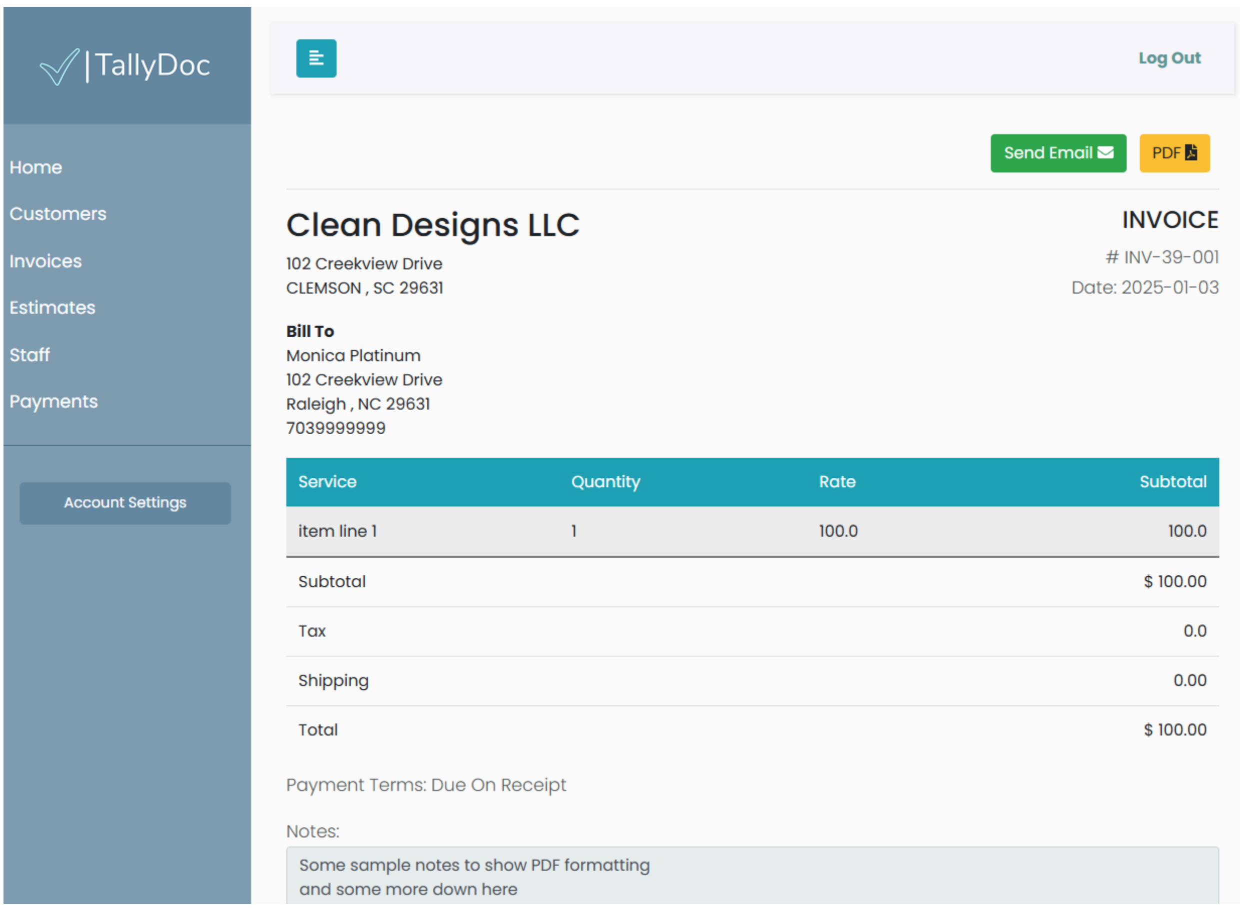
Notes: The notes section is useful for leaving any additional information not captured anywhere else on the form, such as the date the work will be performed, and adding additional contact information or related messages.

Payment Links: A useful way to give customers a way to pay is to add a link to your preferred payment platform. If you would like to display the links to your payment options, ensure the **Yes** button is selected. See the Payment Links section for more info.

Save and create your new invoice by clicking the **Save** button.

Sending an Invoice

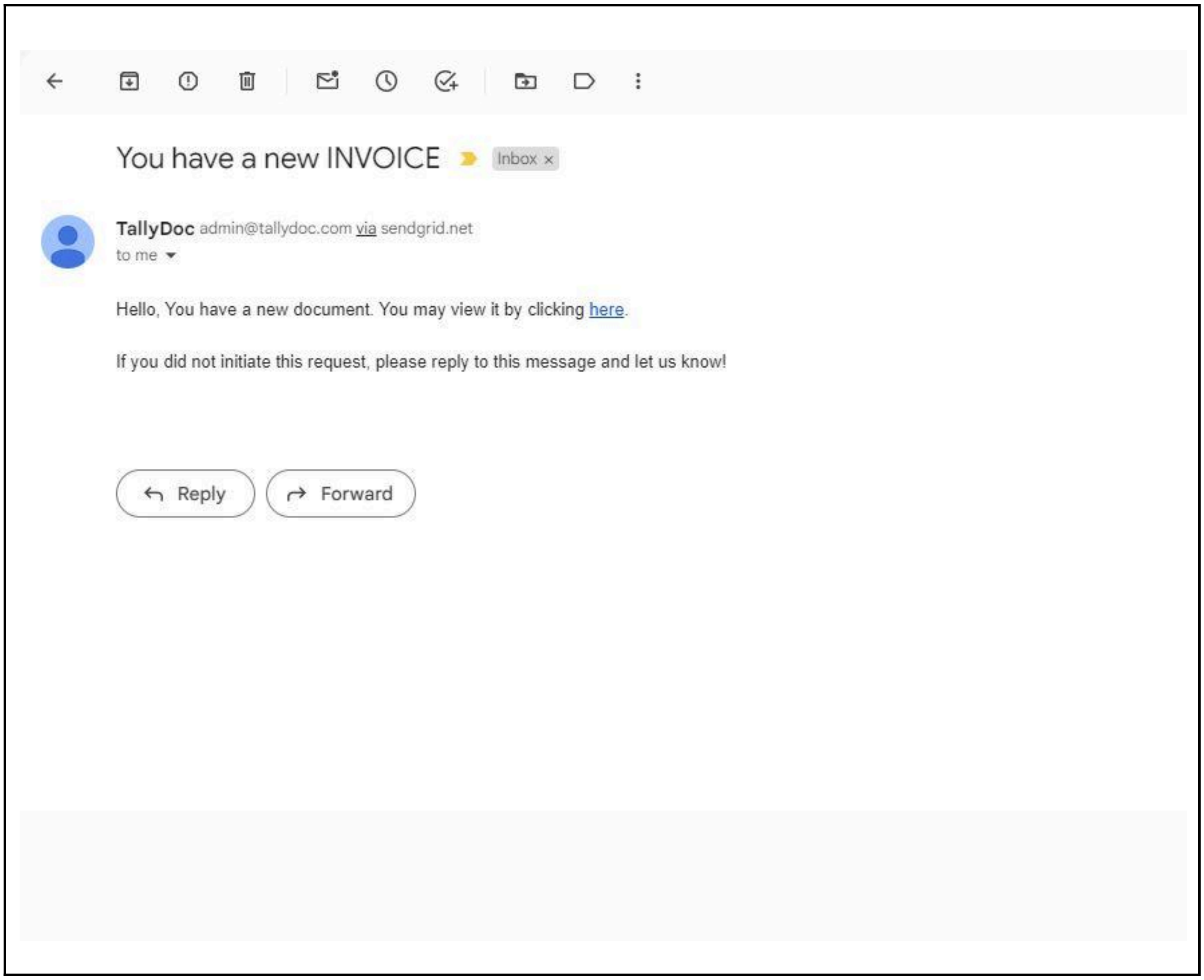
There are multiple options to deliver an invoice to your customers. The following example shows a sample invoice. Note the buttons at the top for **Send Email** and the **PDF** option.



*sample invoice shown.

Clicking the **Send Email** button will display a confirmation message asking if you want to send your customer a link to this invoice. Click ‘Ok’ to send.

Your customer will receive an email with a link to your invoice, such as the following:

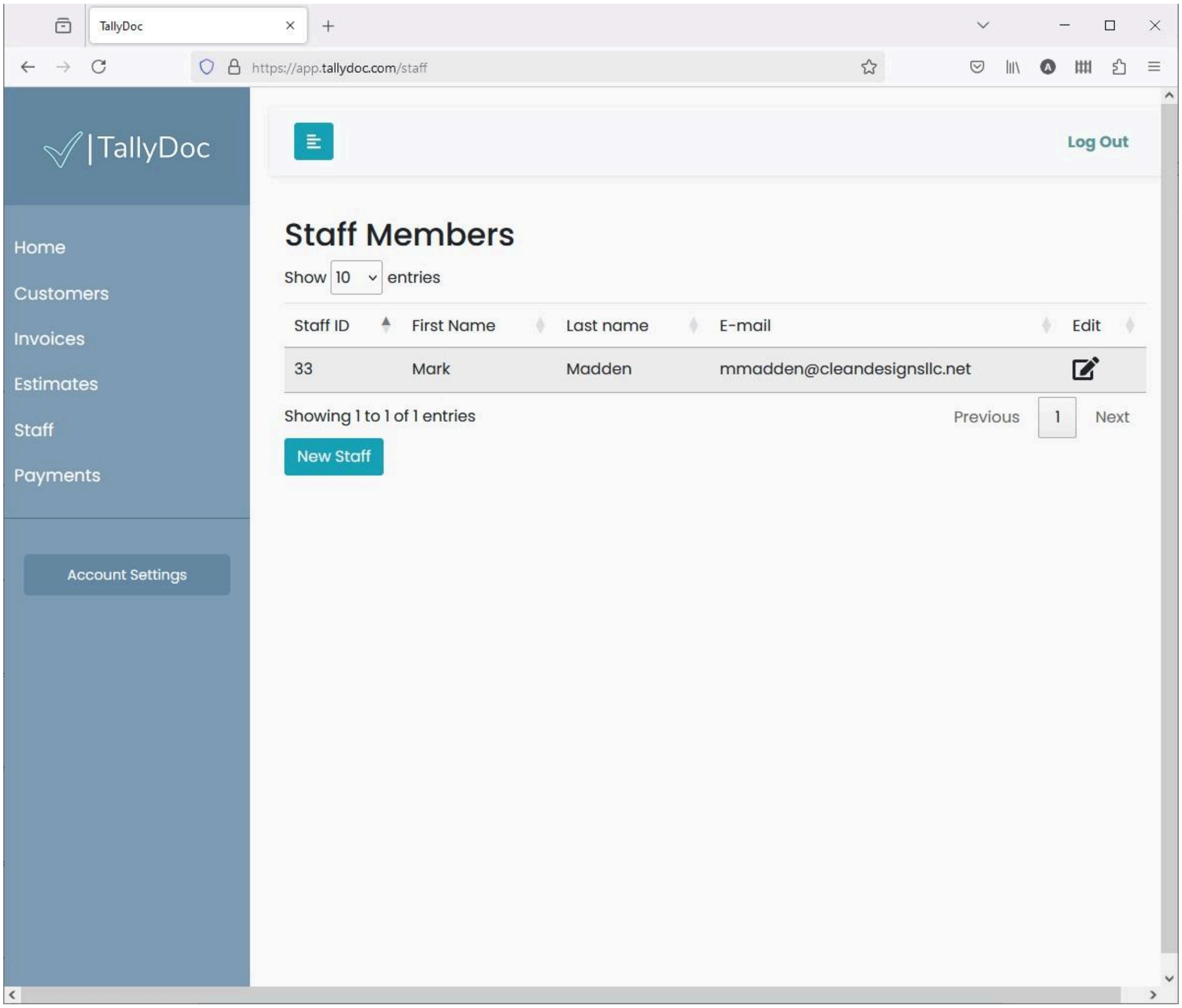


*A sample email is shown.

Your customer can now click the link in the email message to open the Invoice. If you selected the option to **Display Payment Links** during your invoice creation, the links will be visible and clickable for your customer. If your subscription includes digital payments, your customer will have a **Pay Now** button visible.

Staff

Some TallyDoc subscriptions allow multiple staff members to have TallyDoc accounts, and therefore login to your company. You can manage these staff members via the **Staff** link in the left-hand navigation menu. The process for adding and editing your staff is the same as adding and editing your invoices and estimates. By default, you'll see your single-user account.



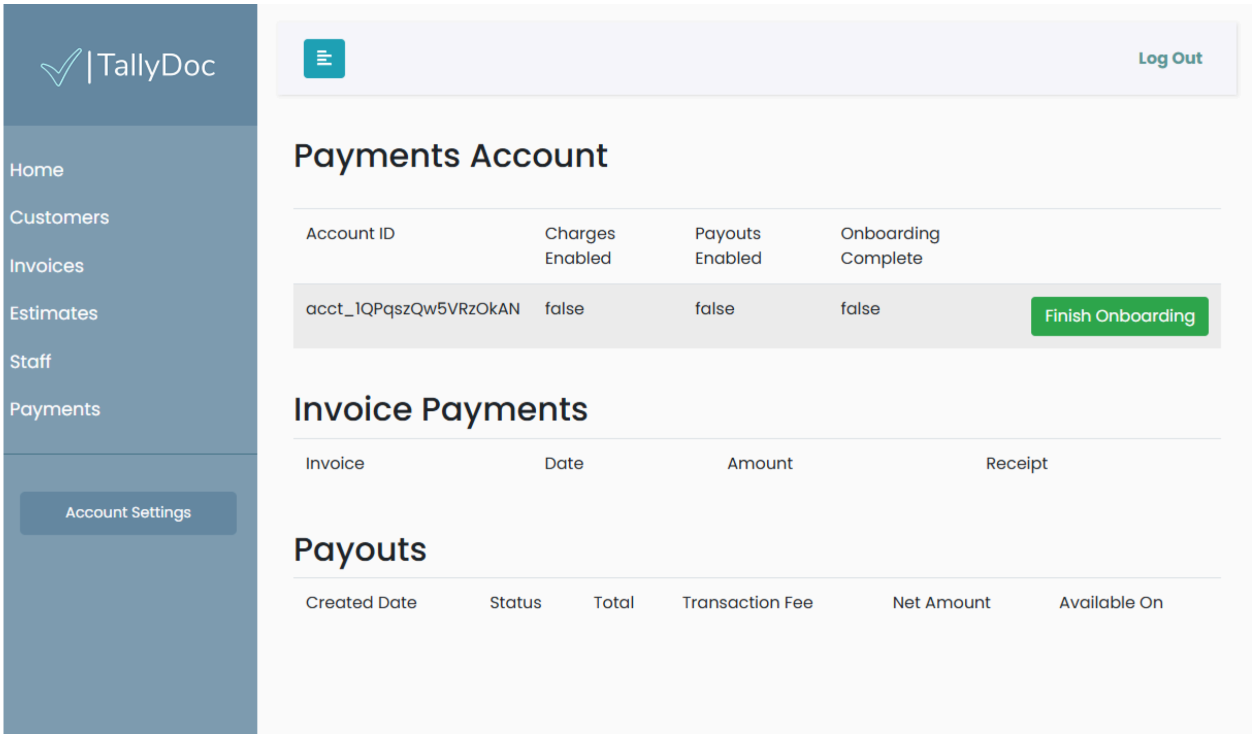
*Example staff list is shown

Payments

TallyDoc integrates with Stripe to enable easy online payments from your customers. Payments are enabled for certain TallyDoc subscriptions. See here for more info.

Setting Up Your Payment Account

1. You can access your payments and payment account by clicking on **Payments** menu item in the left-hand navigation.



*sample payment account shown

2. Stripe Account Onboarding: Use the button to add your payment account and follow the Stripe onboarding steps. You'll be redirected to your TallyDoc screen (as shown above).
3. Once your Stripe account has been approved, you'll see that your account has charges-enabled, payouts-enabled, and that your onboarding is complete. Once complete, you can start accepting payments on your invoices!

Accepting Payments

Once your Stripe account is approved, you can accept payments through TallyDoc.

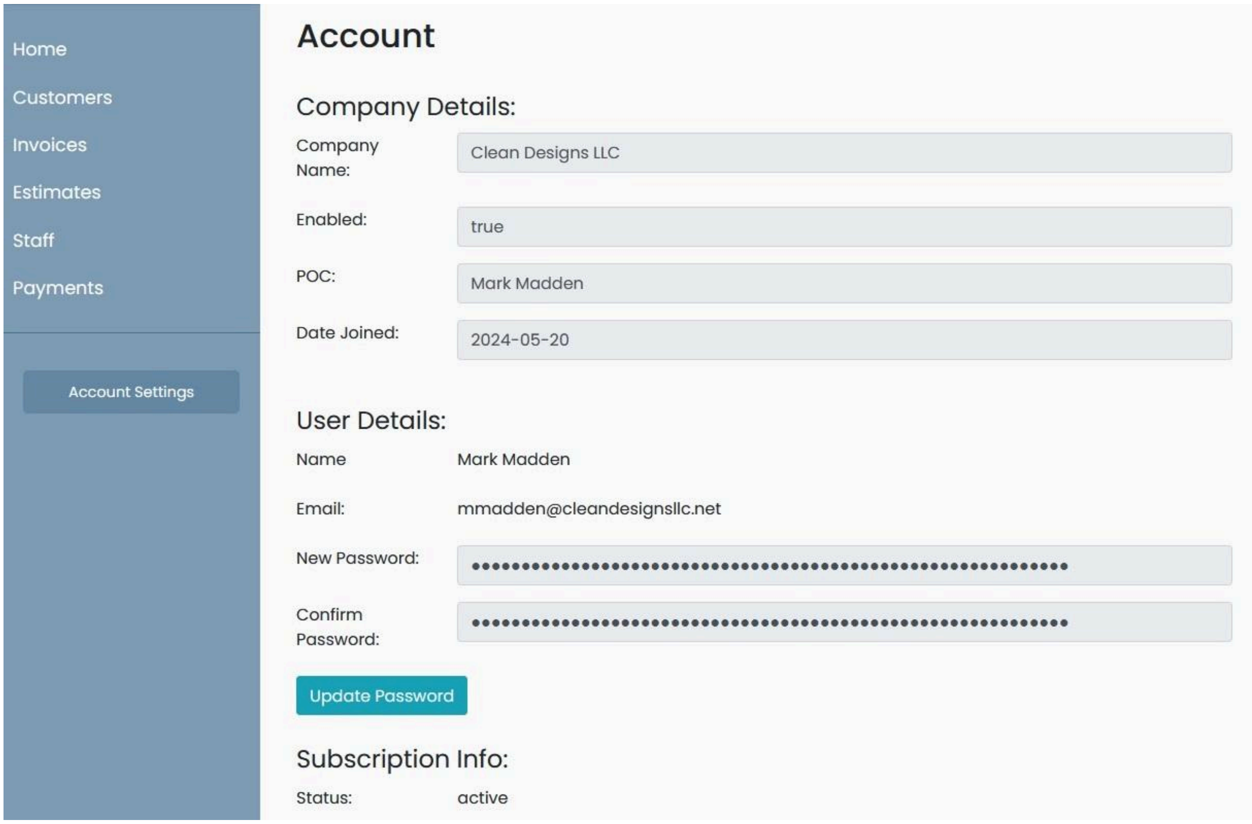
1. **Create an Invoice:** Ensure your Stripe onboarding is complete before sending an invoice.
2. **Send the Invoice:** Send the invoice to your customer via the email option on the Invoice view.
3. **Receive Payment:** Your customer will receive an email with a link to a secure payment page hosted by Stripe.
4. **View Payment Status:** The invoice status will be updated to **Paid** once the payment is processed. on the invoices list and also on the specific invoice screen.

Important Notes:

- You will need to complete the Stripe onboarding process and have your account approved before you can start accepting payments.
- Stripe may require additional information or verification before your account is fully activated.
- For more information on Stripe and its features, please refer to the Stripe documentation

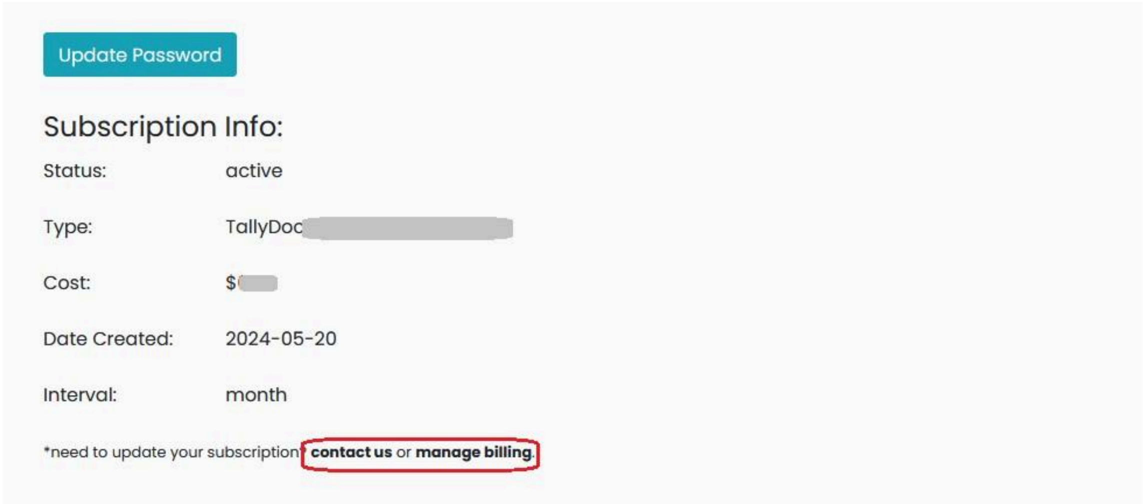
TallyDoc Account Settings

Your TallyDoc account information is accessible and updateable via the Account Settings button in the left-hand navigation. The top part of the page will display:



*A sample account is shown

The bottom part of the account settings page will display your subscription settings. You can manage your subscription anytime by clicking the '**manage billing**' link at the bottom of the page.



*A test account is shown. Some parts have been blurred for privacy.

The '**manage billing**' link at the bottom of the page allows you to pause, cancel, or upgrade your subscription anytime.

Contact Us

We are happy to assist if you have any questions. Contact us via email at:
admin@tallydoc.com
tallydoc.com