

Tallie

Configuring People – Personal Info

If you have synchronized Tallie with your accounting software, your People list may already be populated via the sync. If so, then within each user's **Personal Info** tab, the **First Name**, **Last Name**, and **Email Address** will be automatically populated.

- Make sure that the **Email Address** is accurate and valid – this Email Address will be the user's login name and will be used for Tallie's automatic emails (approval notifications, rejection notifications, etc).
- If any details are missing or incorrect, make these changes in Tallie (or your accounting software) and the bidirectional sync will update the information in your accounting software.
- The Name and Email field will sync bi-directionally with the user's profile in the accounting system if the user is set to Person Type "Employee" under Permissions. [Click here](#) for more information on employee types and permission.

The screenshot shows the 'Tallie' web interface with the 'Manage Lists' menu open. The 'People' sub-menu is selected, leading to the 'People / Create Person' page. The 'Personal Info' tab is active, showing a form with the following fields:

User Info	First Name Leslie	Middle Name
	Last Name Knope	Initials
Sign In	Email Address leslie@usetallie.com	

At the bottom, the 'Email Notifications' section has a 'YES' toggle button.