TallyFi

Enterprise Authentication

TallyFi directly supports login using SAML2 based authentication (Single Sign On) through your own custom identity provider (IDP) for customers with a full subscription license.

In order to activate the service, you'll need to email support@tallyfi.com, where we will help you to gather the required information. Once those details are established, our staff will enable this feature for your domain. Specifically we support:

- IdP-initiated SSO

- SP-initiated SSO

- Just-In-Time provisioning (TallyFi local user account created by login action)

- Single domain IDP: Custom IDPs may only authenticate users from a single static domain (nameID or email attribute must end in matching @domain.com)

In many cases we have found that customers already use an authentication service, like OneLogin or 0auth/Okta. Where possible we attempt to be listed in third party databases like this – if we are not listed in the service you use, please let us know your needs and we can usually accommodate them.

Be aware that, once activated, enterprise authentication supersedes any existing user authentication for users with a matching @domain.com email who use this application (i.e. Any existing users will be forced to use your enterprise login service instead of their pre-existing TallyFi password). Optionally, we can add an external backup user to allow administrative control independent of your enterprise login servers. For more details about that or about any other aspects of enterprise authentication, please contact support@tallyfi.com

Okta Specific:

Email the following to support@tallyfi.com:

- Email Domain: What email domain will all authenticated users be from?

- Metadata URL: Having added the app to your okta account, include your 'Metadata URL' for your IDP - located on the **Sign On tab > Sign on methods > SAML 2.0 -> Metadata details**

- Okta's Application username must be set to "Email"

Initiating SSO login once configured:

- Visit tally.com/user/enterprise, and enter your email address

- The site will redirect you to your SSO provider (IDP), to perform your authentication. Upon success, it will redirect back to tallyfi.com, with your user account logged in.