

Tallyboard Getting-Started Guide

Example 1, SaaS App Getting Started: getting-started guide for Tallyboard, a fictional project tracker.

Product: Tallyboard **Version:** 4.2 **Updated:** September 2026

Who this is for

The first admin setting up Tallyboard for a team of 5 to 50. Time needed: about 15 minutes.

BEFORE YOU START

The invite email from your account owner, a list of teammate email addresses and the latest Chrome, Edge, Firefox or Safari.

Steps

- ☐ 1. Open the invite email and click Accept invite.
Result: the "Welcome to Tallyboard" screen opens.
- ☐ 2. Enter a workspace name, for example "Acme Marketing". Tallyboard creates the address `app.tallyboard.example/acme-marketing`.
Result: an empty workspace with a Boards sidebar.
- ☐ 3. Go to Settings > Members > Invite, paste up to 20 email addresses, choose the role Member, click Send invites.
Result: each person appears under Pending.
- ☐ 4. Click New board > From template > Content Calendar.
Result: a board with To do, In progress and Published columns and 3 sample cards.

- ☐ 5. Go to Settings > Notifications and turn on the daily email digest at 9:00 AM.
Result: a confirmation banner reads "Digest scheduled".

FIGURE 1
Members page with the Invite button highlighted.

Troubleshooting

SYMPTOM	FIX
Invite email never arrived	Check spam, then resend from Settings > Members > Pending.
Workspace address is taken	Add your team or city to the name.
Board opens as read-only	Your role is Viewer. Ask an admin to change it to Member.

SUPPORT
help.tallyboard.example, support@tallyboard.example, reply within 1 business day.