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Certify Travel & Expense Management

www.certify.com

888-925-0510

From the 2018 review of Travel & Expense Management systems.

Certify is a travel and expense management product that is well suited for businesses of any size. Certify is scalable, offering three product levels, and a variety of user-friendly features designed to easily track and manage expenses and their related receipts. All Certify plans offer seamless integration with QuickBooks and QuickBooks Online, and the Professional plan offers integration with a variety of other applications as well.

The Certify Mobile feature allows users to capture both receipt images and related

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users, with multiple classifications available including Employee, Manager, Executive, Accountant, User Administrator and Full Administrator.

Certify supports 64 different languages and over 140 currencies. For businesses that wish to manage employee travel, the optional Certify Travel offers easy desktop and mobile booking capability, corporate rates for all methods of travel including air and rail, along with hotel bookings as well. Certify Travel also integrates with Certify Expense for complete travel and expense management capability.

While mileage cannot be tracked during the driving process, users can use the Map It feature to calculate mileage by entering departure and arrival locations. There is an option for round trip mileage calculation as well.

Certify's Professional and Enterprise plans offer credit card integration that will automatically import credit card expenses directly into Certify Wallet, which is where all receipts and expenses are stored before being added to an expense report. Users can also choose to manually import credit card expenses if desired.

Certify administrators can set up the approval process during product setup including the ability to enter travel and expense policy, set amount thresholds for receipts submitted, and define acceptable expense categories. Users simply click on the Submit for Approval option to send the completed report to the authorized approver. Those designated as approvers receive an email when an expense report is waiting for approval. Once approved, the approver can select the Submit for Reimbursement option. Users can easily check on the status of any submitted reports and can mark the report as paid once the reimbursement process is complete. Optional ACH processing is available in the Professional and Enterprise plans, so any reimbursement can be deposited directly into an employee's bank account.

Certify offers good reporting options for all user levels. Employees can view used

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Certify offers excellent help and support options, with users able to access the searchable knowledgebase, browse various support topics and access an extensive selection of user guides available in PDF to download or print. Users can also watch Certify training videos on demand, and toll-free product support is available during regular business hours. Chat and email support is available as well.

Certify currently offers three plans; Certify Now!, which is designed for 1-25 users, and runs \$8.00 per user, per month. The Professional Plan is for 25-200 employees and is billed monthly as a service fee. The Enterprise Plan is for businesses with more than 200 employees and has an annual fixed cost, which is available upon request from Certify. A free trial of Certify Now! is also available to download from the Certify website. Additional features available in the Professional and Enterprise plans include standard AP feeds, credit card integration and receipt back up. The Enterprise plan also offers HMS and ERP integration and is available in 64 languages. There are also a variety of add-on products available, including Certify Travel, Certify Invoice, and Certify ACH Payments, with all add-on products billed separately.

2018 Rating 5 Stars

Accounting

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