Zoho Expense

www.zoho.com

From the 2018 review of Travel & Expense Management systems.

Zoho Expense is part of Zoho One, a comprehensive suite of applications designed for the small to mid-sized business. Part of the Finance Suite, Zoho Expense offers two product plans; the Free Plan, for up to three users, and the Standard Plan, which offers more storage space.

All Zoho apps can be used online or with the corresponding mobile app, with Zoho offering mobile apps for iOS, Android, and Windows smartphones and tablets. For those that utilize more than one Zoho app, users can create a single Zoho account, which allows them to log in to any app using a single sign-in.

The Zoho dashboard allows users to easily manage all related expense activity. Users

Zoho currently offers three levels of user roles, Submitter, Approver, and Admin. Users only have access to features and functionality found in their own roles. The product also offers multicurrency capability, with the product automatically converting expenses made in foreign currency to the default currency. Businesses can also opt to create expense reports in both currencies, if desired.

Users can track mileage in Zoho using the GPS on their smartphone, entering the details directly into the product. Users can also calculate mileage manually using the default mileage reimbursement rate set up in Zoho. Currently, there are no time tracking or time sheet functions in Zoho.

Users can connect a debit or credit card in Zoho, but each card/account will need to be assigned to a specific employee. Zoho will import the entire card statement, though users can discard any unrelated items in the statement by using the Exclude option. Users can also manually convert any transactions to an expense and add it to the expense report, and also have the option to match credit card transactions to any expenses that have already been entered into Zoho.

Both Approvers and Admins can approve any submitted expenses, though approvers are limited to approving, rejecting, or forwarding any submitted reports. Admins can also authorize reimbursements as well. Both levels can also edit reports if necessary, including approving line item expenses, and sending others back to the submitter for further information, with users responsible for re-submitting any rejected expenses for reimbursement. Admins can set expense account limits during the setup process, and also set receipt requirements as per company policy.

The Analytics option in Zoho offers users the ability to create analytical reports including Expense Details, Expenses by Currency, and Expenses by Project. Also available are Expense Report Details, and Activity Logs. All reports can be customized

as desired, with users exporting the reports to a CSV file or to Microsoft Excel. Users

apps such as Zoho Invoice and Zoho Books.

Zoho offers a good selection of resources, including a welcome guide, FAQ's, release notes, as well as access to a feedback forum. There is also a comprehensive Help option in Zoho that provides users with access to all help documentation sorted by category. Product support is available during regular business hours, with email support available as well.

Zoho Expense is best suited for small to mid-sized businesses. The product is available in two editions; a Free Plan which includes up to three users and 5GB of storage space. The Standard Plan includes up to ten users, unlimited storage space, and unlimited auto scan. The Standard plan currently runs $15.00 per month. Those interested in Zoho can download the free plan or a demo of the Standard plan.

2018 Rating – 4.5 Stars

Accounting

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