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Efficiencies and Time Savings

Certify, provider of cloud-based travel and expense management software, has announced its fully-automated expense management system, designed to save employees hours of time each month. The system uses pre-determined intervals to create and deliver expense reports to employees.

Taija Sparkman • Jul. 30, 2013

The screenshot shows the Certify web application interface. At the top, the logo "certify" with a red checkmark and the tagline "travel & expense made easy" is on the left. On the right, there's a user profile "Ashley Emery" and links for "My Account", "Support", and "Logout". Below this is a navigation bar with "Home", "Travel", "Receipts", and "Reports".

The main content area is divided into several sections:

- Get Started:** A three-step process: 1. Add expenses and receipts to your Certify Wallet; 2. ReportExecutive creates your expense report automatically; 3. Make final edits and submit your expense report for approval. Below this, it says "ReportExecutive™ is on." and "Next Build Day: Wednesday, July 31, 2013".
- My Expense Reports:** A table showing the status of reports: Drafts (1 item), Pending Approval (0 items), Pending Payment (5 items), and Archived (25 items).
- My Certify Wallet:** A section showing "6 Receipts".
- What's New in Certify:** A section with a lightbulb icon, listing "Certify ReportExecutive™" and "Personal Expenses".
- Spend Smart:** A section with a "Ratings & Reviews" link, showing three entries with star ratings and descriptions: Starbucks, Pasadena, CA (5 stars, "Good Service - Easy parking too."), Marlow's Tavern, Marietta, .. (4 stars, "Good food."), and Qf Cycle 00010001, Port.. (5 stars, "Fun spinning workout - great for").

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stop wasting time building expense reports and let the system do it. All an employee has to do is review their report, then push a button to submit. ReportExecutive will help our clients regain thousands of hours in annual productivity.

The new feature lets employees scan receipts from both their mobile device and desktop computer to automatically create a report compliant with company policy at pre-determined times. The system then notifies employees when a new report is ready for review. Finance and accounting employees can schedule weekly, bi-monthly or monthly reports. In addition, corporate card charges are automatically populated in the expense reports. Other features include ReceiptParse and Cleanup Wizard. ReceiptParse, which was introduced in 2012, allows users to populate expense reports using the camera on a mobile device. The CleanUp Wizard helps employees identify missing data before submitting the expense report for approval.

Through its software, Certify aims to make the expense management process more efficient for companies and employees. According to a recent [Certify survey](#), more than 50 percent of companies still have a manual process in place and face various challenges as a result. CFOs and accounting staff have to deal with past due and incomplete reports, lost receipts and tedious reconciliations.

“ReportExecutive has fundamentally changed the way we develop expense reports, and is saving us several hours a week in accounting and employee time,” says Terri Tweedy, management accountant with Pharmacists Mutual Companies. “We are also overjoyed about the change to personal expenses and the fact that we no longer have to make an additional entry to offset cash. Certify is constantly finding ways to improve their product even more.” Pharmacists Mutual Companies started using ReportExecutive a month ago. Since then, the company has generated more than 100 reports.

The Certify app is available for iOS, Android, Windows and Blackberry devices.

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