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Tallie offers a pay-as-you option, where users simply pay as the product is used, making

Mary Girsch-Bock • Sep. 12, 2016

The image shows the Tallie logo, which is the word "Tallie" in a green, rounded, sans-serif font. The logo is centered within a white rectangular area that has a subtle drop shadow, giving it a three-dimensional appearance. The entire logo is enclosed in a thin grey border.

Tallie Expense Management Software: www.tallie.com

Best Fit: Tallie, from SpringAhead, offers small to mid-sized businesses that are looking for online/mobile expense management capability at an affordable price

Product Strengths:

- Product is available as a mobile app or online via SaaS/Cloud
- Product is easily navigated
- Product offers solid integration options with a variety of accounting and ERP applications
- Product offers excellent training and help options

Potential Weaknesses

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making a great solution for smaller businesses. Tallie offers an easy to use interface that is designed for minimal data entry. The product uses Optical Character Recognition (OCR) algorithms that can quickly identify and categorize key data as it is entered.

To process receipts, users can simply snap a photo of the receipt and upload it directly to Tallie for quick processing. Receipts can also be forwarded to Tallie via email, with the product able to recognize the email address, and process the attached expenses accordingly. All submitted expenses will be automatically bundled into an expense report, which can be reviewed for accuracy by the employee prior to submitting the report for approval.

Mileage tracking can be done automatically using a smart phone by simply touching Start at the beginning of the Trip, and Stop at the end. Users can also simply enter departure and destination addresses into Tallie, and it will automatically calculate mileage. Users can also opt to connect Tallie to any bank account to automatically import all credit card transactions directly into the product. Once a credit card transaction has been imported, Tallie will automatically match the transaction with previously uploaded receipt images. Source documentation is always available, with users able to drill down to view receipt images and mileage maps.

Expense & Management Functions 5 Stars

Tallie allows managers to create spending rules during product setup, with users able to create rules by either expense category or by spending limit. The product also offers multi-tiered approval capability, with each manager and approver set up with specific rules and/or spending limits attached. Tallie also flags duplicate entries, and allows managers to edit and annotate any reports prior to processing. Management can also set company expense policies in Tallie and the product will easily flag any exceptions as they occur. Employees will automatically receive a submission

reminder at the end of each month regarding any unsubmitted expenses, and

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start and stop options on the phone. Receipts can also be forwarded directly to Tallie from online merchants for quick expense management. Auto-categorization capability allows Tallie to easily categorize expenses based on previous expense history, and the product will also create an expense report, bundling all expenses together for a single report, with users able to move expenses between reports as needed. The product will also flag policy exceptions, detect duplicate entries, and provide management with status updates.

Integration Options 5 Stars

Tallie offers the ability to sync with various third party accounting applications, so all expenses will automatically be recorded in both applications, avoiding duplicate data entry. Native integrations are supported for Intacct, QuickBooks, QuickBooks Online, Xero, and Bill.com, where data can be shared between Tallie and critical accounting fields. Using the Activity-Based Sync capability found in Tallie, the data sync is triggered each time a change is made in Tallie, so all accounting fields will be automatically updated without having to manually sync systems, or perform nightly updates. In addition to the integrations mentioned, Tallie also offers integration with ERP's such as SAP, Oracle, Sage, and Microsoft Dynamics, and the product can also be configured to export payroll data or import travel data.

Help/Support 5 Stars

The Tallie Resource Room offers users access to a variety of introductory videos that provide instructions for commonly used functions found in the product. There are also training guides available for both administrators and end-users that can be downloaded when needed. A complete training webinar, as well as various short booklets are also available as well. Telephone support is available during extended business hours, and users also have access to support via email as well.

Summary & Pricing

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yearly contract, and is available upon request.

2016 Star Rating 5 Stars

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