CPA Practice **Advisor**

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Mary Girsch-Bock • Jun. 19, 2017



Shoeboxed

www.Shoeboxed.com

From the 2017 reviews of Expense Management systems and apps.

Shoeboxed is a receipt management service that is well suited for small to mid-sized organizations. Shoeboxed is designed to organize receipts and business cards, and creates expense reports as well.

Shoeboxed works as a receipts scanning and organization service, where users receive an envelope to enclose their receipts. The envelope is then mailed to Shoeboxed, where the receipts are scanned, and later returned to the company. A mobile app is also available so users can scan their own receipts and upload them directly to Shoeboxed, where they are stored until needed for tax purposes or to attach to an expense report.

Shoeboxed uses 15 default categories that receipts are placed into automatically. Users can also create rules for receipts, with users able to add a category to a specific receipt, with any subsequent receipts from a particular vendor automatically placed

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GPS to automatically track mileage. Users can select the 'Start Mileage' Tracking function by simply placing a pin on the point where tracking should begin and then selecting 'End Mileage' Tracking to calculate the number of miles traveled.

Shoeboxed offers expense report creation as well from the receipt management dashboard. Users can select the 'Create a New Report' option, choose the date range the report should include, and list the receipt categories, vendors and credit cards to include. Users have the option to generate the report as a PDF or Microsoft Excel spreadsheet, and can email the report directly from the report creation screen.

Shoeboxed integrates with a variety of third-party applications including QuickBooks, Xero, Evernote, GoDaddy, Bench, Wave, ScanSnap, and others.

Shoeboxed contains a comprehensive knowledgebase, where users can search for answers in a variety of categories, including Getting Started, Mobile Apps, and eReceipts. Any additional questions can be directed to support staff via chat, or by opening a support ticket from the website. Toll-free telephone support is also available during regular business hours.

Shoeboxed is a great alternative for small to mid-sized organizations that desire better receipt management in a paperless environment. Shoeboxed offers free document storage, and four pricing levels; Lite at \$15.00 a month; Classic at \$39.00 a month; Business at \$69.00 a month; and Executive for \$125 a month. The Classic, Business and Executive plans offer aQuickBooks Online integration. A free 3-day trial is available as well. Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

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