for small to mid-sized businesses that need to track travel and related expenses for multiple employees. The product offers seamless integration with QuickBooks ...

Mary Girsch-Bock • Jun. 19, 2017

Certify Travel & Expense Management

www.certify.com

From the 2017 reviews of Expense Management systems and apps.

Certify is a travel and expense management software application that is best suited for small to mid-sized businesses that need to track travel and related expenses for multiple employees. The product offers seamless integration with QuickBooks

products, making it an ideal solution for those using QuickBooks. Users on G2 Crowd

Certify Mobile allows users to snap a photo of receipts and any other expenses. The app works offline as well, with users able to snap photos and later synchronize with the mobile app when a connection is available. Certify's ReceiptParse and AutoFill features help to automatically fill expense fields automatically. Those without a smart phone can submit receipts and expenses via email, scanning the information, fax, web camera, and even text message. The product supports multiple roles, so users can be assigned the level of access needed.

Certify supports multiple languages and currencies, over 140 currencies supported, as well as 64 different languages. For travel management, Certify Travel is available. This add-on helps find the lowest rates, handles pre-trip approvals, and offers complete travel expense reporting. The product also integrates with Certify Expense.

Users can track mileage in Certify by creating a mileage expense category in the product, and then utilize Map It to calculate total mileage. Users can also add mileage totals manually, or Map It uses GPS to automatically apply and track mileage.

The Professional and Enterprise editions of Certify offer credit card integration, with users able to quickly import business expenses for inclusion in an expense report.

Prior to being processed, each expense report submitted must go through an approval process, with parameters for the approval chain determined during product setup. Users can easily view the status of a submitted expense report, and will receive a prompt to mark the report as paid once reimbursement has been received.

Certify offers an optional ACH service, (Professional and Enterprise editions only) with users able to quickly initiate approved payments with funds going directly to an employee's bank account. Approval limits can also be set during the setup process,

with each approver assigned an expense approval limit, with excess expenses

which is accessed under the Analytics option. The report displays expense report status, processed status, expense type, department, billable and reimbursable expenses, and other information, with users able to choose the specific date range for the report.

All levels of Certify offer seamless integration with QuickBooks, and the Professional edition of Certify integrates with ERP products such as SAP, Oracle, NetSuite, Microsoft Dynamics, and Salesforce.

Certify's online support page provides users with the ability to ask a question or enter a related search term. A variety of user guides are available in a downloadable PDF for easy access. FAQ's cover a variety of topics, and the Training Camp option provides a list of free webinars that users can attend. Toll-free product support is available 24 hours a day on business days, with web and chat support available as well.

Certify is currently available in three versions: Certify Now!, for 1-25 users, runs $8.00 per user/per month, and offers access to basic system functions. The Professional version of Certify is billed as a monthly service fee, and offers additional product functionality. The Enterprise version is best suited for larger businesses with more complex needs, and offers all of the features included in both the Certify Now! and Professional editions, along with both HRMS and ERP integration, and is billed annually. Add-on products available include Certify Travel 2.0, Certify Invoice, and ACH Reimbursement, all billed separately.

2017 Rating: 5 Stars

Accounting

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