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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, light gray border.

Tallie Expense Management Software

www.tallie.com

From the [2017 reviews](#) of Expense Management systems and apps.

Tallie, an online expense management system is well suited for businesses of just about any size. Tallie recently announced that it has merged with Nexonia, with operations continuing in both the U.S. and Canada.

Along with online access, Tallie offers mobile apps for both iOS and Android users. The mobile apps allow users to easily track expenses using their phones. Users can also opt to forward receipts from online merchants directly to Tallie for easy reconciliation. Tallie can quickly categorize expenses submitted by using a previous expense history.

Tallie uses Optical Character Recognition (OCR) algorithms that can identify and

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simply touch Start at the beginning of their trip, and Stop at the end. Mileage can also be tracked by putting starting and ending addresses into the application. The Enterprise edition of Tallie also offers integration with third party travel and practice management applications.

For easy reconciliation, Tallie users can easily connect their bank accounts to the application, which will automatically import all credit card transactions; automatically matching credit card transactions with previously uploaded receipts.

Users can create a multi-level approval process during initial product setup. Specific rules and spending limits can also be setup at this time. Manager approvals can be assigned at an employee level, and a default approver can be notated in the system when an approver has not been set up. The product also flags any duplicate entries and allows managers to edit reports for accuracy prior to processing. Employees will receive automatic notification when an expense report has been approved. Tallie allows managers to create spending rules during product setup, with users able to create rules by either expense category or by spending limit.

Tallie automatically creates an expense report, bundling all submitted expenses together in a single report. Users can easily create multiple reports if needed, and can move expenses between reports as well.

Tallie allows users to track any expense entered in the application, with analytical reports available for all expense types. Users can run reports by category, user, merchant, or project, within any user-defined time frame. All Tallie reports can be exported to CSV, TSV, or XLS if desired.

Tallie offers native integrations with Intacct, SmartVault, QuickBooks Desktop, QuickBooks Online, Xero, and Bill.com., with data easily shared between applications. Users can also export files into payroll applications such as Paychex,

ADP, SurePayroll, and can also export expenses to practice management software

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One of Tallie's best features is their billing model, which charges users who create at least one expense during the month, so employees that don't have expenses to track for the month will not be charged.

Tallie also offers a free 14-day trial that users can download from the website in order to try the product out prior to purchasing.

Tallie is available in two editions; a Business Plan, that runs \$9.00 per ACTIVE user per month and supports an unlimited number of users, unlimited expense reports and unlimited receipt scanning, as well as integration with QuickBooks Online, QuickBooks Desktop, Xero, Intacct, and other applications. The Enterprise Plan edition is designed for larger corporations and includes both travel and practice management integrations. Pricing for the Enterprise Plan is available upon request.

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2017 Star Rating 4.75 Stars

Accounting

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