CPA
Practice Advisor

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Tallie Expense Report Software

www.tallie.com

800-592-5144

From the 2018 review of Travel & Expense Management systems.

Tallie is an online expense report software application well suited for businesses of any size. Available in two versions, Tallie can be used from any platform on just about any device, including desktops and laptop computers as well as iOS and Android smart phones and tablets.

Tallie's mobile app allows users to just snap a photo of a receipt and upload the receipt directly into the application. The product uses Optical Character Recognition (OCR) algorithms to identify information read on the uploaded receipts, eliminating the need to manually enter data. For those not using a mobile device, receipts can be emailed directly to Tallie. Users can also opt to have receipts forwarded from

merchants directly to Tallie for automatic processing. Users will typically have to

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Tallie easily tracks mileage, with users able to track mileage using GPS Start-Stop capability found on Android and iPhone apps. Users can also simply calculate to/from mileage by entering origination and stopping points in Tallie, which will calculate the mileage. The Enterprise edition of Tallie also offers integration with various travel apps.

Users can choose to connect Tallie to any credit card or banking institution, with the option to easily import expenses directly into Tallie. Users can review the list of transactions and choose the ones they wish to import, with Tallie matching the transactions into previously uploaded receipts if they are available.

During the setup process, managers can create a custom approval chain that can include manager approvers, project approvers and the ability to enable monetary approval levels. The Company Preferences option allows managers to set policies for a variety of categories including a meals policy, receipt requirement, and airfare policy. Users can also set spending limits on all categories or choose which expense categories to attach limits to. Managers can also choose whether employees are flagged when a violation occurs or simply prevent submission of expenses that have violated the policy rules.

Tallie also flags duplicate expense entries, so users can verify expense accuracy prior to submitting reports for approval. Once submitted, approvers have the option to edit any submitted reports for accuracy. Employees will receive an email notification when a report has been approved.

Users can simply click on the 'Create Expense Report' tab at the top of the interface screen to create a new expense report, with the application automatically bundling all submitted expenses together in the new report. There are no limit to the number

of reports that employees can create, and receipts and expenses can easily be moved

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QuickBooks Desktop, QuickBooks Online, SmartVault, Sage Intacct, Xero, and Bill.com. Tallie's Enterprise edition also integrates with Oracle, SAP, Sage, and Microsoft Dynamics. The product offers extensive export capability, with users able to export data to payroll applications like Paychex, ADP, and Sure Payroll. Users can also export data to practice management applications such as Practice Engine, STAR, CCH, and Thomson Reuters.

The Tallie Resource Room offers a variety of tools and resources to Tallie users including a good selection of brief videos covering a variety of topics. Users can also browse selected support topics and a searchable knowledgebase is available 24/7. Telephone support is available during extended business hours, with users able to access support via email as well.

Tallie is a good fit for businesses of any size and offers two editions of the application, the Business Plan, which runs $9.00 per active user per month with a $50.00 billing minimum and includes an unlimited number of system users, iOS and Android Apps, direct integration with popular third-party applications, and automatic credit card feeds. The Enterprise Plan is designed for larger organizations and offers fixed fee pricing billed on a yearly contract, with pricing available from Tallie. A 14-day trial is also offered, with all features available during the trial.

2018 Star Rating 5 Stars

Accounting

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