Certify Travel & Expense Management

Certify, Inc.

www.certify.com

888-925-0510

From the 2020 Reviews of Expense Management Systems.

Certify Expense from Certify is well suited for businesses of all sizes. Scalable, Certify offers three plans that are suitable for very small businesses, to those with more than 200 employees. In addition, Certify Now!, the entry-level plan, includes automatic

synching with both QuickBooks Desktop and QuickBooks Online, while the

allowing users to easily capture and upload receipt images, with the ability to enter details prior to uploading the image. Certify also includes the ReceiptParse feature, which can automatically extract information from any receipt uploaded to Certify, while the AutoFill option automatically fills expense report fields with the extracted data. There is an option to review extracted data for accuracy prior to submitting the expense report. The mobile app also allows users to create and submit reports, and allows approvers to easily submit and forward approved reports for reimbursement.

In addition to using a mobile device, users can also upload and manage receipts from their desktop computer, with the option to add receipts via email, upload, web camera, fax, or by text message if necessary.

Certify Expense supports multiple user roles, with both standard user and role-based

Certify's Professional and Enterprise plans include a credit card feed option, with nightly data received. All transactions are routed to Certify Wallet, which serves as a repository for all receipt images and transactions until they are added to an expense report. In addition, credit card transactions can also be manually imported into Certify.

Certify administrators have complete control over the entire approval routing process, with the ability to assign a single approver or multiple approvers, with certain criteria attached to each approver, such as expense thresholds or specific expense types. This allows users to simply click on the Submit for Approval option, where Certify will then route the report to appropriate approver.

Policy rules can be set in Certify, with automatic policy enforcement for each expense report. All submitted reports are flagged for policy violations or other compliance issues, with report line items in compliance sent on for reimbursement, while flagged items are returned to submitters for correction and resubmission. Once a report is sent for reimbursement, employees can be paid using ACH transfer, expediting the reimbursement process tremendously.

Certify offers good analytic reporting options, with users able to access a variety of reports including an Expense Detail Review, Processed Expense reports, Team Expense reports, and Expenses by GL Dimension (or account) code. Policy violations can also be tracked as well.

Certify offers a variety of add-on options that are designed to integrate with the core application, including Certify Invoice, Certify Purchasing, and Certify ACH Payments. In addition, Certify Now! and Certify Professional plan users can opt to add Certify Travel along to their core application.

All Certify plans integrate with both QuickBooks and QuickBooks Online, with the

Certify is scalable, with three plans available: Certify Now!, which is designed for 1-25 users, and runs $8.00 per user, per month; Professional, which is designed for 25-200 employees; and Enterprise, which is for businesses with more than 200 employees. The Professional plan is billed as a monthly service fee, while the Enterprise plan is billed annually, with pricing available directly from Certify. Those interested in the product can also request a demo from Certify or access informational videos by filling out an information request form.

2020 Rating 5 Stars

Strengths:

- Offers automatic synching with QuickBooks applications

- Suitable for businesses of all sizes

- Offers numerous add-on features

Potential Limitations:

- Many features only available in more expensive plans

- No demo available to try out

Accounting

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