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Expensify

Expensify, Inc.

[Use.expensify.com](https://use.expensify.com)

From the [2020 Reviews of Expense Management Systems](#).

Expensify is a scalable travel and expense application suitable for small to mid-sized businesses.

Completely web-based, Expensify works with both desktop and laptop computers. A mobile app for both iOS and Android smartphones and tablets is also included with all plans.

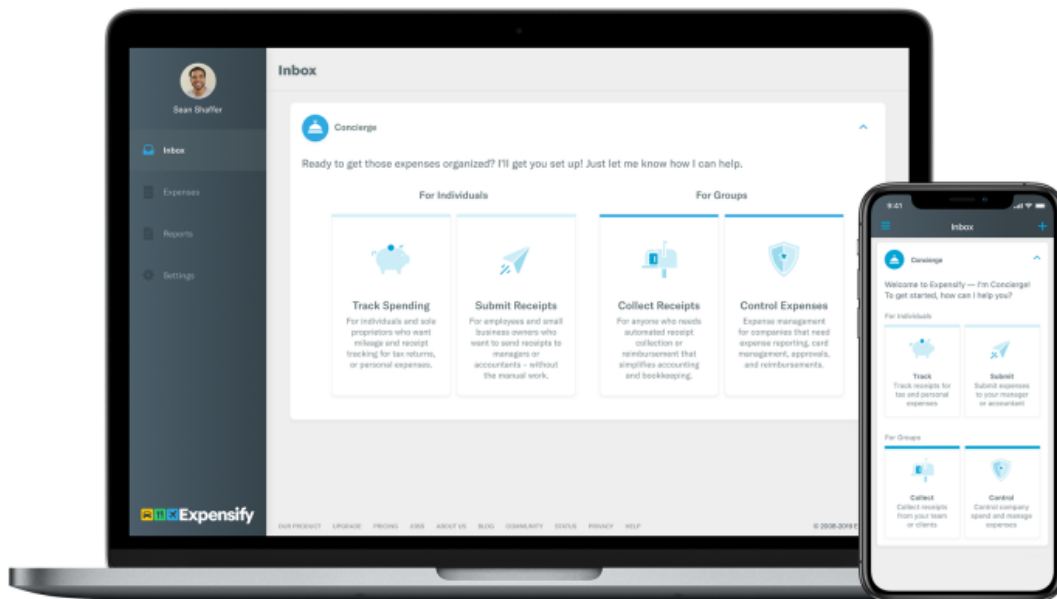
The setup process in Expensify is designed to be easy, with new users guided through a series of questions that help expedite the entire setup process. Unlimited receipt scanning is offered in the application, with users able to snap a photo of any receipt and upload it to Expensify, where the SmartScan feature will transcribe the data on the receipt. The receipt is then stored until ready for use with an expense report, with the data automatically populated in the created report. Receipts can also be uploaded into Expensify via a web browser, or dragged and dropped into the account as needed. For those who use ride-share services, users can choose to connect to either Uber or Lyft for automatic importing of receipts directly into Expensify. In addition,

users can create spending controls during the product setup process, with managers

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credit card reconciliation, importing credit card data in a spreadsheet format. Users can also import transactions directly into Expensify, where the transactions will be matched with a receipt and coded to the proper expense account.



Expensify offers custom workflow setup, which can be entered during the product setup process. Administrators can opt to use a single approver, or create custom approval levels, with the workflow process attached. When attaching users to a group, they can also be assigned to a specific approver, with the option to provide each approver with specific approval limits.

Employees will appreciate Expensify's next-day reimbursement capability which allows approved reports to be processed and employees reimbursed the following day. Reimbursements can be processed through payroll or deposited as an ACH transfer directly into the employee's bank account.

Expensify takes automated expense report creation to a whole new level with the Scheduled Submit feature, where users can schedule reports to be submitted using a

specific frequency. Using the SmartScan feature, Scheduled Submit will create an

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TSheets, and Zenefits. Other integrations available in the Collect plan include NetSuite, Oracle, Financial Force Accounting, SAP, ADP, along with CCH and Thomson Reuters applications.

Expensify Docs includes a searchable knowledgebase that offers easy article search capability. Users can access the Resources page, which includes access to the Expensify Community, access product user guides and troubleshooting tips, and a series of on-demand webinars can also be accessed from the Resources page.

Expensify offers product support via email, with all support questions answered in the order in which they are received. Users can email support directly with a question or send an in-app message from within the program.

Expensify is a travel and expense management application best suited for sole proprietors, consultants, and small to mid-sized businesses. Expensify offers complete scalability, with four plans available ranging from Track, which is designed for individuals or consultants who need to track their expenses; Submit, which is ideal for very small businesses; Collect, which is good for small and growing businesses; and Control, which is best-suited for small to mid-sized businesses that need to track numerous expenses. Both Track and Submit are \$4.99 per month for a single user, while Collect is \$5 per user, per month, and Control runs \$9 per user per month. All plans offer a free trial for those interested in trying out one of the plans.

2020 Rating 4.75 Stars

Strengths:

- Offers four plans
- Free trail available

- Good integration with tax applications

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