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**Tallie Expense Report Software**

[www.tallie.com](http://www.tallie.com)

**800-592-5144**

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

Tallie is online expense report software that is designed for small to mid-sized businesses that need to manage business expenses. Tallie offers three plans: Basic Accounting, Cash Control, and Cloud ERP, with an option to add additional users available in each plan. A mobile app for both iOS and Android devices is also available.

Tallie's mobile apps offer powerful features such as photo receipt capture, GPS-enabled mileage tracking, and expense report tracking using GPS Start-Stop capability. Users also have the option to enter starting and stopping points, with Tallie calculating the mileage.

Tallie's interface is designed for simplicity, allowing users to drag and drop receipts

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Tallie supports multiple user levels, with the appropriate level for each user assigned during the product setup process. Users can be assigned to teams if desired, and multiple approvers can be set up in Tallie as well. Users will need to assign a default currency in Tallie, though the application does support multiple currencies, automatically converting any foreign currency to the default currency.

Both credit cards and banking institutions can be connected directly to Tallie, enabling users to automatically import any expenses directly into the application. Once transactions are imported, users can review the list to determine which items they wish to import, with Tallie automatically matching the transactions with expenses already uploaded.

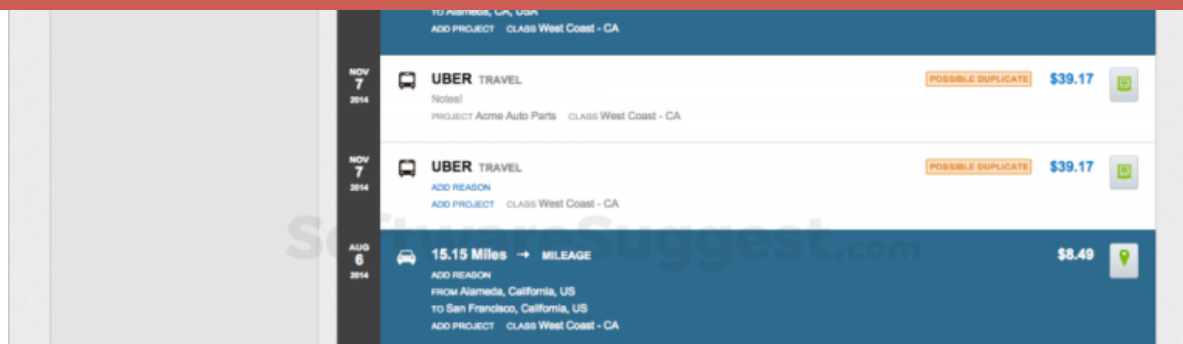
Tallie allows businesses to set up multiple approvers, with an approval chain created during product setup. The Rules Engine allows businesses to incorporate business expense policies directly in the application, flagging policy violations and creating policy alerts for approvers. Rules can also be set in the application, such as requiring a receipt for certain purchases or above a specified amount. In addition, expense limits can be set for each expense category, and the application will flag duplicate expenses. Once a report has been forwarded to an approver for review, it can be edited, with an option to return the report to the employee for changes, or the approved report can be directly submitted for reimbursement. Employees will receive

an email when a report has been approved or edited.

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Once receipts have been scanned and transactions matched, Tallie will automatically bundle expenses into a report. Additional expenses can also be added to the created report by dragging and dropping them directly into the report. An unlimited number of expense reports can be created, with users able to easily move transactions between reports if needed.

Tallie includes excellent data analysis capability, so users can run reports for all expenses using a variety of categories, including merchant, class, project, and user, for any specified time period. In addition, all reports can be exported to a CSV file, TSV, or Microsoft Excel for further customization.

Tallie offers a variety of third-party integrations including Sage Intacct, QuickBooks Desktop and QuickBooks Online, Xero, NetSuite, and Bill.com. Other integrations include payroll applications such as Paychex, ADP, My Payroll HR, SurePayroll, and ZenPayroll, along with practice management applications such as Practice Engine, STAR, CCH, and Thomson Reuters.

The Tallie Help Center offers users access to a variety of support topics, along with information on configuring Tallie and how to best utilize integrations. A searchable knowledgebase is included in the application, and users also have access to all product updates in the Help Center. On-demand training videos are available, and users can sign up for live training if desired. In addition, PDF user guides are also

available for downloading. Tallie offers telephone support during extended business

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## 2020 Star Rating 5 Stars

### Strengths:

- Three plans available
- Free trial offered
- Intuitive navigation

### Potential Limitations:

- No travel app included
- Not suitable for very large businesses

Accounting

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