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ACCOUNTING & AUDIT

2020 Review of Zoho Expense

Mary Girsch-Bock • Feb. 20, 2020



Zoho Expense

Zoho One

From the **2020 Reviews of Expense Management Systems.**

Zoho Expense is part of Zoho One, a suite of applications that are designed for small to mid-sized businesses. Zoho Expense offers three plans levels: a Free Plan, which is a great fit for freelancers and sole proprietors; the Premium Plan which works for small businesses with at least 10 users; and the Enterprise Plan, which is designed for more than 500 users. Interestingly, there seems to not be a plan directly designed for businesses with between 2-10 employees.

Zoho Expense is an online application, with all Zoho apps designed to integrate seamlessly, allowing firms to build a complete set of business and accounting solutions. A mobile app for iOS, Android, and Windows smartphones and devices is also available to download if desired.

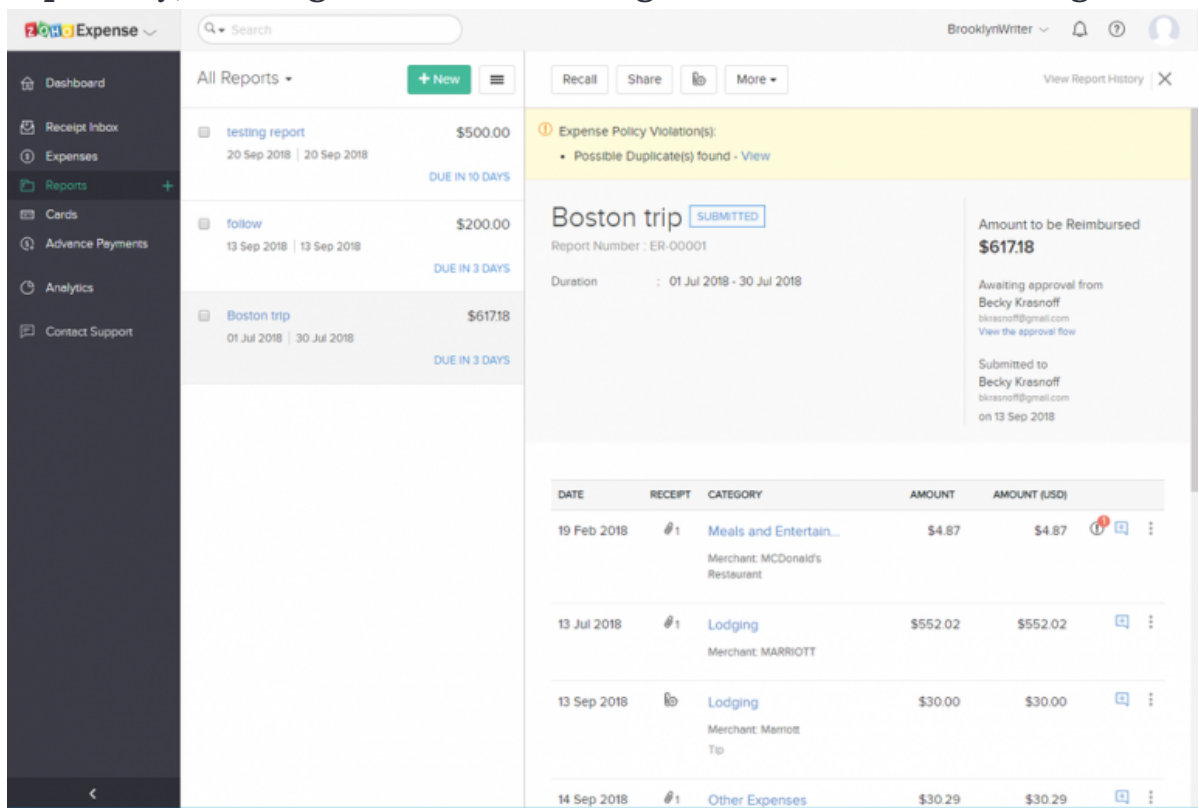
Zoho Expense's Free Plan offers limited features such as receipt storage, multicurrency capability, customer and project tracking, and cost allocation; the Premium Plan includes mileage expense tracking, per diem expenses, auto-scan capability, and travel management features such as travel requests and pre-travel approval.

Zoho Expense includes a dashboard, where users can easily manage all of their expense activity. The application also includes a mobile app that allows users to snap a photo of a receipt and upload the receipt to Zoho, where it will fill in all of the appropriate expense categories. Users can manage all uploaded receipts in the Receipt Inbox, where they remain until they are attached to an expense report. For those who prefer to enter expenses manually, that option is available in Zoho as well.

Zoho Expense includes three user levels: Submitter, Approver, and Admin, and users only have access to the features that are available with their specific role. The product includes multicurrency capability, easily converting foreign currency into the default currency if desired. There is also an option to create expense reports using multiple types of currency, a useful option for companies with locations across the globe.

For those who need to track mileage, Zoho Expense includes a mileage tracker app that uses GPS to track mileage totals. The application does not include time tracking

or time sheet capability, although it does offer integration with time tracking



applications.

Zoho Expense allows users to connect corporate credit cards directly to the application, providing a list of all of the expense transactions for each card. An automatic bank feed can also be set up in Zoho Expense, which allows users to have all credit card transactions and their monthly statement imported directly into the application. This enables users to easily match credit card transactions with expenses that have been included in an employee's expense report.

Both approvers and admins can approve expenses, with both user levels able to approve, reject, and forward submitted reports, although only admins can approve reimbursements. Both user levels can also edit a submitted report, sending the changes back to the original submitter to request additional information.

One handy feature is the ability to set expense account limits during the product setup process, including setting receipt requirements to fit company policy.

The Expense Analytics feature in Zoho Expense allows users to create reports such as Expense Details, which provides a good look at expenses incurred, what category the expense is tied to, and the employee that incurred the expense. An Expenses by Product report is also available, which is a great way to see how over or under budget a project may be. All reports can be exported to a CSV file or to Microsoft Excel for further customization, or saved as a PDF.

Zoho Expense is part of Zoho One, an operating system that comes complete with more than 40 integrated business apps in a wide variety of categories. A mobile app

for both iOS and Android devices is also available. In addition, Zoho Expense also integrates with third-party applications including QuickBooks Desktop, QuickBooks Online, Xero, Slack, Lyft, Office 365, Google Drive, Dropbox, Box, Evernote, and OneDrive.

All Zoho applications offer excellent support options, including detailed getting started guides, a comprehensive FAQ page, and easy access to help options throughout the application. Zoho also offers free phone support Monday through Friday around the clock, with email support options available as well.

Zoho Expense is best suited to small to mid-sized businesses. The Premium Plan is priced at \$3.00 per month plus \$2.50 per user per month. If you want to try it out, Zoho currently offers a free 14-day trial for the Premium Plan.

2020 Rating – 4.5 Stars

Strengths:

- Excellent integration with other Zoho Suite applications
- Very affordably priced for even the smallest businesses
- Numerous tools and resources available for new users

Potential Limitations:

- Smallest plan is for 10+ users
- Does not offer time tracking capability

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