
Industries We Serve Include:

- State & Local Government
- Professional Sports
- Pharmaceuticals
- Gaming & Casinos
- Hospitality
- Telecommunications
- Education
- Transportation
- Life Science
- Technology
- Utilities
- Non-Profit
- Professional Services
- Agriculture

Company Size 5 - 3,000+ Users

Transform Spend Management
Intuitive Web-Based & Mobile Solutions
Intuitive Web-based and Mobile Expense solution that is easy for employees, effective for management, and powerful for accounting!

Create, submit, approve to pay, and analyze expenses with full tracking and control during the entire expense life cycle. Designed for mid-size and enterprise organizations as a standalone solution, or as a seamless out-of-the-box, real-time integration with Sage Intacct.

Mobile Entry & Approvals
- Experience easy expense entry and approvals on the mobile app.
- Capture expense on or off-line with your phone or tablet's built-in camera in seconds.
- Currency options, robust auto fill, type to search
- Entry-Assistant feature
- On-The-Go (OTG) web service synchronizes time entry & expenses
- Mobile entry, e-mail alerts, and approvals
- View, enter and approve transactions across multiple Workplace companies from a single interface

Advanced Optical Character Recognition (OCR)
- Capture comprehensive receipt data accurately in real-time and ensure data integrity. Experience exceptional user experiences with robust OCR technology.
- Bit to market OCR with logo recognition
- Dynamic data transcriptions
- Mobile App includes Entry Assistant feature in addition to OCR

Advanced Expense Split
- Split expenses reports, even by line item, into multiple clients, projects, activities, budgets, groups, accounts, individuals, time periods, etc.
- Composite bills & composite expense capabilities
- Composite expenses are as easy as any expense transaction

In-line Receipt Attachment
- Capture & view receipts directly on the screen with each expense item during entry & approval process. Eliminate mailing or losing receipts.
- Easy use, view, store attachment features

Open Payment Capabilities – (Sunshine Act)
- Comply with Open Payment Act reporting, allocating expense, meals, gifts, payments, etc, by NPI number.
- Expense entry splitting
- Robust NPI search by name, NPI#, other fields

Dynamic Rule Engine & Approval Workflow
- Implement any corporate spend policy & approval rule imaginable anytime during expense life cycle, even at creation!
- Dynamic rules engine
- Unlimited routing rules
- Unlimited expense entry rules
- Unlimited routing customized to roles and organization structure – based on approval criteria such as amount, department, budget, project, vendor
- Mobile & e-mail approvals
- Position-based approvals, a rapid deployment based on company structure & associated approval limits
- Approval of revisions to a transaction
- Optional auto skip to next (but not final) approver
- Acceptance of variances (price, quantity, expense allowance, travel request)
- Approval criteria can be at transaction (header) level, or expense line level

Direct Connect Credit Card & Banking Integration
- Create expense reports from credit card transactions automatically, accurately, anywhere, anytime, with confidence.
- Eliminate data entry and duplicates.
- Real-time integration with any banks that supports OFX (Open Financial Exchange)
- Out-of-the-box manual upload options
- Banking-specific custom import maps capabilities
- Auto credit card expense report by employee card assignments

Real-Time Cash Advances & On-Account Balance
- Experience real-time seamless cash advance & on-account balance adjustments on both the expense & ERP sides, until the entire amount is fully expensed.
- Full automation, visibility, efficiency
- Robust real-time integration with your balance sheet on the ERP side

Advanced Optical Character Recognition (OCR)
- Capture detailed financial data with a simple list of Expense Types that can automatically be assigned to GL accounts. Gain control & efficiency through automation mapped to your business while providing superior user experience.
- Robust price, GL account and tax schedule defaults
- Fixed price & daily per dem amount enforcement capabilities
- Define attachment requirements based on type of expense
- Cost by country/region maintenance with effective dates options

Robust Questionnaire Capabilities
- Enhance communications, streamline entry, and prompt users to provide key information for specific charges, as a requirement or an option.
- Configurable questionnaires, anytime, anywhere
- Unlimited number of questions
- Multiple data types to tailor responses to your business needs

Google Maps & Mileage Calculation Capabilities
- Enforce mileage policy with accurate mileage driven with audits via our Google map integration.
- Automatic mileage calculations
- Up to 25 waypoint flexibility
- Standard commute deduction option
- Personal travel subtractions
- Detailed routes driven, even by line item

Powerful GL Distributions
- Distribute expense, even by line item, into hundreds of GL accounts in seconds.
- Total control & flexibility reflected in the expense & ERP sides
- Distribution Groups for auto or manual GL distribution
- Want to distribute 50 line items into 500 GL accounts? You can!

Powerful Tax Engine
- Assign tax schedule by line level, incorporate enterprise-wide tax amount visibility. Adjust recoverable taxes within the system in no time.
- Foreign recoverable taxes & tax guidelines capabilities
- Advanced tax capabilities

Intuitive Expense Type Engine
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