any size. Certify is scalable, with three product levels available, and all plans offering seamless integration with both QuickBooks and QuickBooks Online.

Mary Girsch-Bock • Feb. 18, 2019

Certify Travel & Expense Management

www.certify.com

888-925-0510

[From the 2019 reviews of Expense Management systems.]

Certify Travel & Expense Management from Certify is well suited to businesses of any size. Certify is scalable, with three product levels available, and all plans offering

seamless integration with both QuickBooks and QuickBooks Online.

Certify's mobile app allows users to easily capture receipt images by simply taking a photo; entering or entering onscreen details prior to uploading the image. The mobile app supports iOS, Android, and Windows mobile devices, and allows users to utilize the app in offline mode when connectivity is unavailable. Users can also utilize the ReceiptParse feature in Certify which offers the ability to automatically extract information from the uploaded receipt, which can be reviewed for accuracy, then save the data in order to complete their expense report.

Certify easily supports multiple user roles, with administrators able to set system access for standard users as well as classifications such as Employee, Manager, Executive, Accountant, User Administrator, and Full Administrator. The product also supports more than 140 different currencies as well as more than 60 languages.

Certify does not offer automatic mileage tracking, though users can utilize the Map It feature that works to calculate mileage when departure and arrival locations are entered into the application. Users can calculate mileage based on a one-way or round trip.

Both the Professional and Enterprise plans offer credit card integration, automatically importing credit card expenses directly into Certify Wallet, which is where all receipts and expenses are stored until they are added to an expense report. Users can also opt to manually import credit card expenses into Certify as well.

Product administrators can easily set up the approval process, which is where travel and expense policy can also be set. Amount thresholds for expenses can also be set, and acceptable expense categories can be assigned. Once approvers are assigned, employees can simply click on the Submit for Approval option, which will send their completed report to the appropriate approver. Approvers receive an email when a report is sent to them for approval, and if approved, can automatically submit the

report for reimbursement. Employees can easily check on the status of any report

with the Enterprise version offering additional integration options with a variety of third-party applications including PeopleSoft, SAP, Oracle, NetSuite, Microsoft Dynamics, Sage, and Salesforce.

Certify offers users a variety of help and support options, with users able to search the available knowledgebase for answers. There are a variety of support topics available, and user guides are available as well. Training videos are also available, and toll-free product support is available during regular business hours. Both chat and email support are available as well.

Certify currently offers three plans; Certify Now!, which is designed for 1-25 users, and runs $8.00 per user, per month; the Professional Plan, which is designed for 25-200 employees and is billed monthly as a service fee, and the Enterprise Plan, which is for businesses with more than 200 employees. Those interested in the product can also download a free trial of Certify Now!

Along with the standard features available in Certify Now!, additional features such as AP feeds, credit card integration, receipt back up and more robust integration options are available in both the Professional and Enterprise plans. Certify also offers a variety of add-on applications that integrate with Certify Travel and Expense, including Certify Invoice, and Certify ACH Payments, with all add-on applications billed separately.

2019 Rating 5 Stars

Accounting

CPA Practice Advisor is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us