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Mary Girsch-Bock • Feb. 18, 2019



Tallie Expense Report Software

www.tallie.com

800-592-5144

[From the **2019 reviews of Expense Management** systems.]

Tallie is an online expense report software application that is well suited for businesses of all sizes. Tallie is available in two versions and can be used on any platform, including desktop and laptop computers, as well as iOS and Android smartphones and tablets.

Tallie offers a mobile app that allows users to snap a photo of a receipt and upload

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Tallie supports multiple user levels, with levels assigned during the product setup process. Managers can also assign users to teams for easier management if desired. The application support multiple approvers as well. Default currency is assigned during setup, with the product supporting multiple currencies, and uses FX spot rate to automatically convert any foreign currency transactions that are entered.

Tallie can easily track mileage using GPS Start-Stop capability, or users can enter starting and stopping points in Tallie, which will then calculate the mileage.

Users can connect Tallie to their credit card or banking institution, importing expenses directly into the application. Users can easily review transactions and choose those they wish to import, with Tallie matching the transactions with previously uploaded receipts.

Tallie supports multiple approvers, with users able to customize the approval chain during the setup process. Policies can also be created for meals, receipts, and airfare policy, with the option to impose spending limits across the board or only on specified types of expenses. There is also an option to flag employees when a policy violation occurs, or even prevent submission of any expenses that violate current policy. Tallie will also flag duplicate expense entries, ensuring that submitted reports are accurate. Once a report is submitted to an approver, the approver has the option to edit a submitted report if necessary. Employees will also receive an email once a report has been approved.

Tallie makes it easy to create a new expense report, with the application automatically bundling all submitted expenses together into the new report. Tallie does not limit the number of reports that an employee can create, with users able to easily move uploaded and saved receipts and expenses between reports if necessary.

Tallie also offers an analytics page, allowing managers to keep a handle on expenses

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export data into payroll applications such as Paychex, ADP, and Sure Payroll, as well as to practice management applications such as Practice Engine, STAR, CCH, and Thomson Reuters. The Enterprise edition of Tallie also integrates with various travel apps as well.

Product support is available from the Tallie Resource Room, which offers a variety of tools and support, including a solid selection of short videos that cover a variety of topics. A variety of support topics are also available, as is a searchable knowledgebase. Tallie offers telephone support during extended business hours, with support available via email as well.

Tallie is a good fit for just about any size business and offers two editions; Business, which runs \$9.00 per active user per month, with a \$50.00 billing minimum required. The Business edition supports an unlimited number of system users, and includes iOS and Android Apps, direct integration with popular third-party applications, and automatic credit card feeds. The Enterprise Plan is best suited larger organizations and offers fixed fee pricing billed on a yearly contract, with pricing available from Tallie. A 14-day trial is also offered, with all features available during the trial.

2019 Star Rating 5 Stars

Accounting

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