



# Expense reports, the easy way



# water.org

Case study



## How Zoho Expense helped water.org streamline expense management

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### The customer

Water.org is a global non-profit organization working to bring water and sanitation to the world – making it safe, accessible, and cost-effective.

### The solution

Water.org automated its expense reporting, eliminated paper reports, and streamlined its approval process through Zoho Expense.

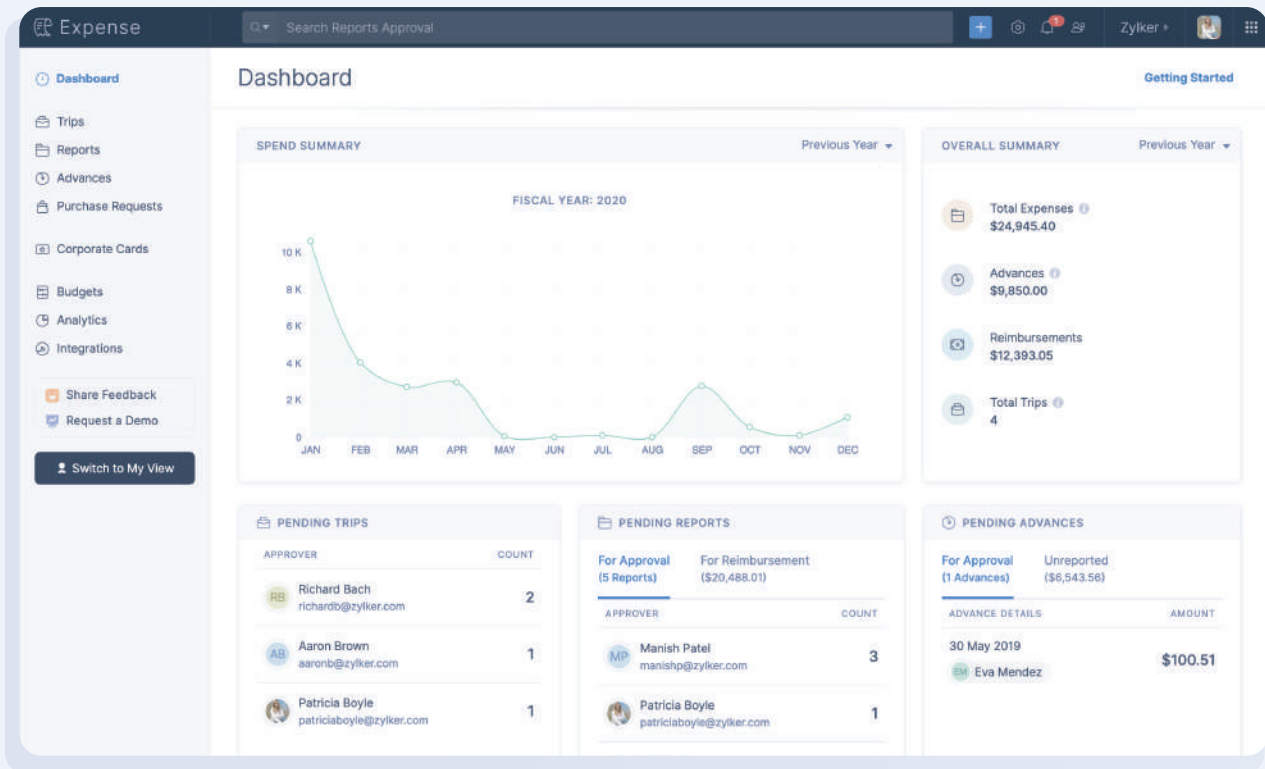
### The challenge

Water.org employees travel around the world, resulting in extensive reporting of business and travel expenses.

### The benefits

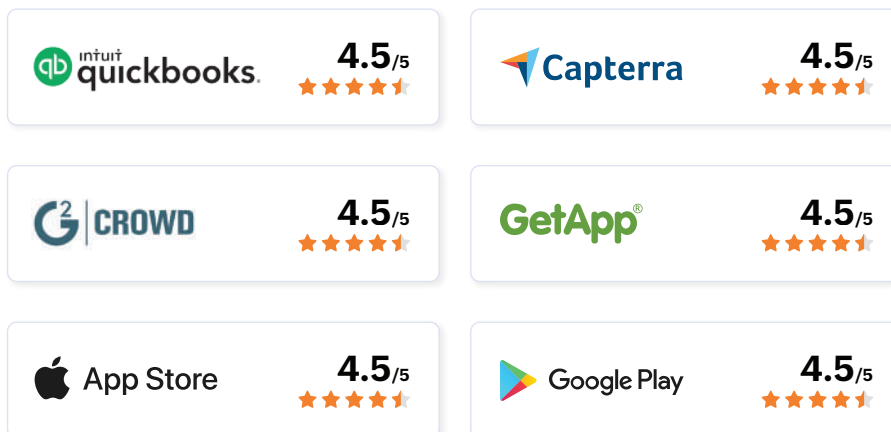
The shift to Zoho Expense decreased the workload for Water.org's accountants, reduced paperwork for everyone, and freed up staff time to focus on their vision of safe water and sanitation for all.

# Effortless expense reporting, guaranteed.



Zoho Expense is online expense reporting software, tailor-made to help businesses automate their travel and expense management.

## RATED BY THE BEST



# Streamline business travel

From planning travel itineraries and managing travel documents to facilitating bookings for flights and hotels, we've streamlined all aspects of business travel.



## Travel requests

Establish accountable business travel. Enable employees to create trip requests by entering information like the purpose of the visit, departure and arrival dates, and travel and accommodation details.



## Pre-travel approval

Set up multi-level approval workflows to ensure all trips are properly vetted and accounted for before departure.



## Ticket cost approval

Tighten control over spend by setting up an approval flow to validate your employees' flight booking.



## **Bookings**

Your travel desk can add flight, hotel, and train options for employees to choose from. Once options are chosen, they can upload air tickets and other documents into the system to facilitate all-in-one access for the travelers.



## **Itinerary management**

Your travel team can retrieve travelers' entire itineraries to make necessary arrangements and to fulfill duty of care.



## **Traveler profiles**

Use traveler profiles to speed up the booking process and ensure that critical data and preferences are applied on every trip.



## **Travel advances**

Track and reconcile approved trip advances in multiple currencies. Travelers can also submit additional advance requests during their trip.



## **Online Booking Tool integrations**

Empower your employees to plan their trips on their own by integrating Zoho Expense with Sabre's GetThere, Routespring, and Itilite (India only).

# Automate expenses

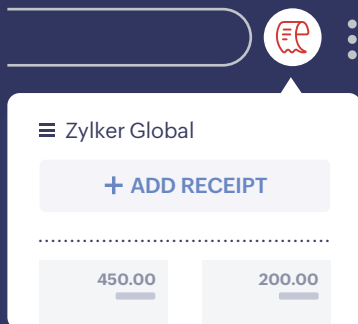
Simplify expense creation by letting employees upload receipts, record expenses, and track mileage instantly.

Autoscan Receipts ▾

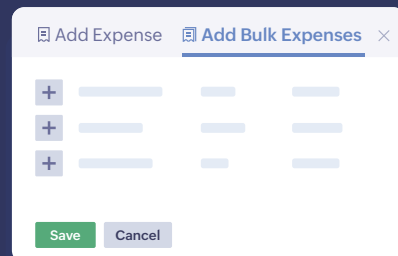
📄 From Computer

☁️ From Cloud

Upload receipts



Chrome add-on



Add expenses in bulk



Click and convert  
prepaid, debit, and  
credit card  
transactions



Expense creation



## Mileage tracking

Zoho Expense's mileage tracker frees you from manually tracking your miles for tax deduction and reimbursement. Define mileage rates for different policies, departments, cost centers, and vehicles.



Distance covered



GPS tracking



Odometer reading



Point-to-point map tracking



## Multiple currencies

No more currency confusion! Add expenses incurred in the local currency. Zoho Expense automatically converts them to your firm's base currency.



## Per diem automation

Set custom per diems based on location and travel hours to automatically calculate expenses for every trip.



## Split expenses

Zoho Expense allows employees to split and itemize expenses to simplify taxation and cost allocation.



## Card feeds

Connect your corporate cards to automatically fetch and convert transactions into expenses.

# Receipt management

Zoho Expense is packed with robust features to simplify receipt management and ensure no receipt goes untracked.



## Receipt autoscan

Save the data, not the clutter. Zoho Expense automatically detects the language of your receipt, extracts data, and creates expenses in a jiffy.

| **10+ languages supported\***



## Receipt forwarding

Automate the forwarding of receipts from your email inbox to a personalized receipt forwarding address to convert them to expenses quickly.

## Easy storage

Store receipts in the cloud for safekeeping, then import them into Zoho Expense and convert them into expenses.

 Evernote

 Dropbox

 Google Drive

 box

 OneDrive



# Purchase requests

Pre-approve business expenses to control spend and curb duplicate orders.



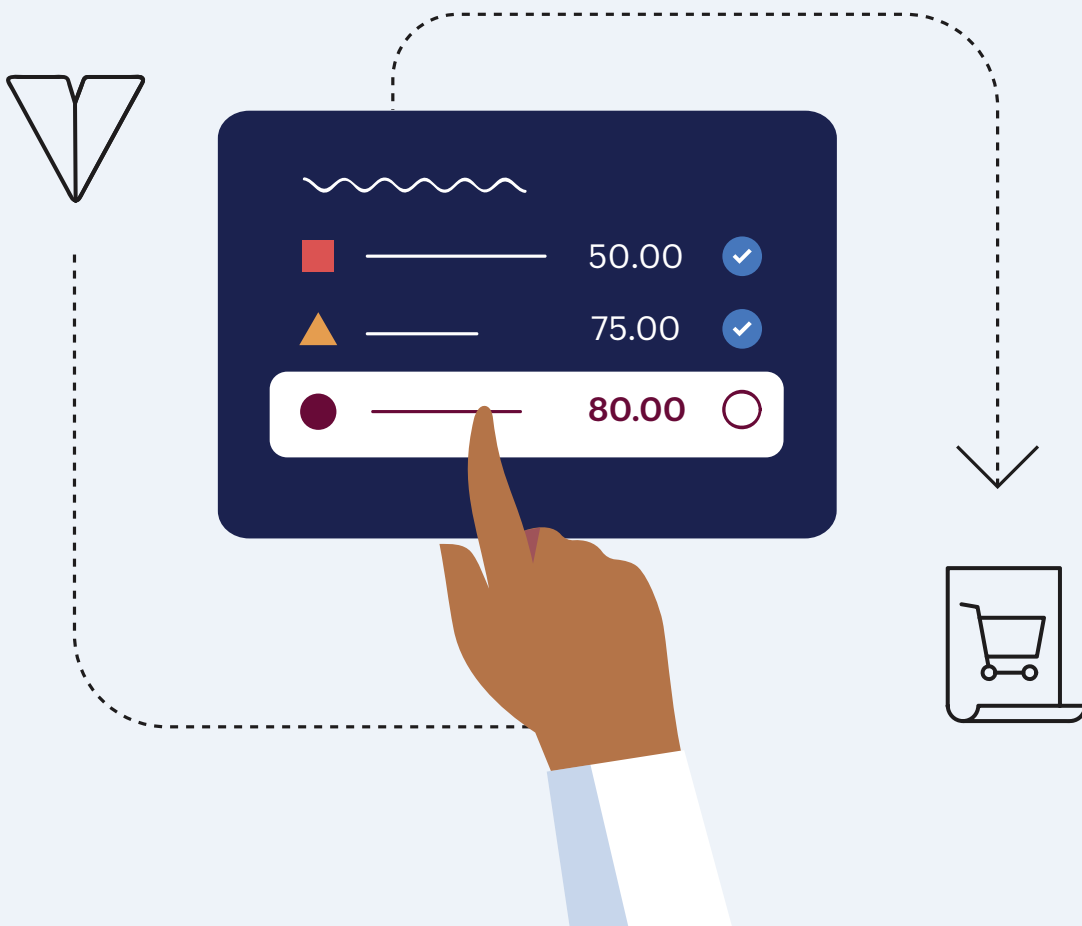
Define customizable **multi-level approval workflows**



Track purchases from a single place



Ensure **policy compliance** and granular visibility into your cash flow



# Simplified expense reporting

## Expense report automation

You can configure Zoho Expense to sift through each employee's expenses, compile them into a report, and automatically submit it to the designated approver.

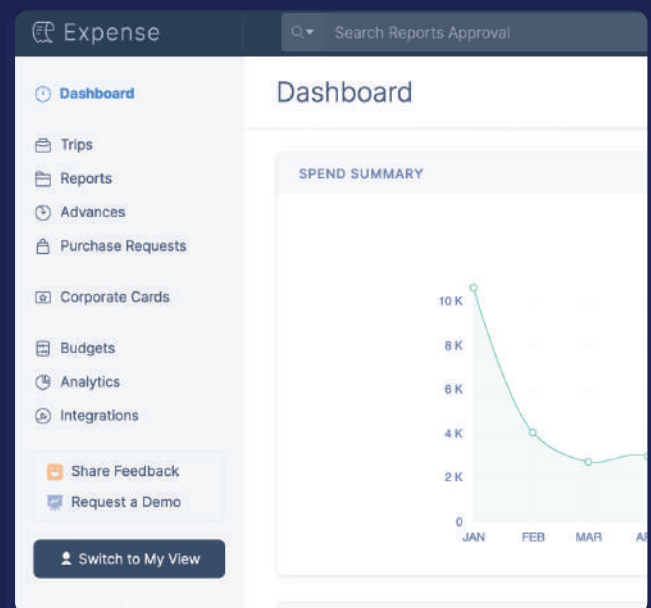
## Role-based views

Eliminate unauthorized access with role-based admin, approver, and submitter views.

## Delegate approval

Assign an out-of-office approver to validate expense reports on your behalf when you're away.

## Admin view

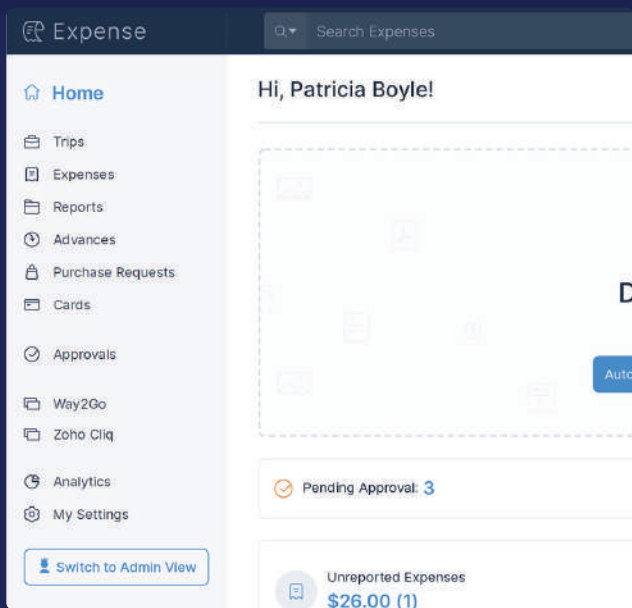


## Automated validation

Say goodbye to manual approval. Set up custom criteria for expense reports that can be auto-approved or auto-rejected.

Zoho Expense automates the entire expense reporting process for your employees so they can focus on their goals instead of getting stuck with paperwork.

## My view



## Multistage approvals

Enforce accountability and transparency with custom approval workflows for expense reports. Criteria-based approval lets you create unique approval workflows for every employee or department.

## Reimbursement

Reduce employee waiting and increase on-time payment by tracking pending reimbursements.

## Seamless collaboration

Reduce turnaround time with comments and a built-in common chat bar.

## Instant notification

Keep approvers and submitters notified along every step of the way—when a report is submitted, approved, rejected, or reimbursed, and when comments are added to reports.

# Cost control and compliance

Zoho Expense equips travel and finance teams with the functionalities they need to enforce T&E policies and maintain compliance.



## Policy enforcement

Zoho Expense lets you configure comprehensive policies for different branches, departments, and cost centers, with clear limits on employee allowances. The app automatically warns the user in case of out-of-policy expenses.





## Spend control

You can create custom spend limits (yearly, monthly, or daily) based on the travel policy you've crafted. In case of violations, employees can either be warned or blocked from submitting the expense.

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## Budgeting

Allocate budgets for trips, expense categories, expense types, and individual users. You can track the actuals versus the budget at every stage.

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## Fraud detection

Zoho Expense helps curb expense fraud by automatically pointing out fraudulent modifications, policy violations, and duplicate expenses in expense reports.

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## Regulatory compliance

We help you stay audit-ready at all times by digitally storing your receipts with periodic or instant backup.

# Insightful analytics

Zoho Expense gives you a holistic picture of your organization's entire T&E spend. You can make informed decisions on budgets, forecast accurately, and drive compliance with the multitude of included reports.

The screenshot displays the Zoho Expense Analytics interface. At the top, there is a search bar for reports. Below it, a 'My Favorites' section lists reports like 'Expenses by Category', 'Expense Reports Details', 'Reimbursements by User', 'Corporate Card Reconciliation', and 'Activity Logs'. The main dashboard is divided into three sections: EXPENSE, REPORTS, and REIMBURSEMENTS. The 'REIMBURSEMENTS' section is highlighted, showing a detailed view of 'Reimbursements by User' for the period of 01 Jan 2020 to 31 Dec 2020. This view includes a bar chart and a table.

USER NAME	REIMBURSEMENT COUNT	REIMBURSEMENT AMOUNT
Manish Patel manishp@zykler.com	2	\$215.00
Harry Reid harryr@zykler.com	2	\$215.00
Patricia - Finance Admin	7	\$215.00
James Mathew	3	\$215.00
Richard Bach	1	\$215.00
Manesh Patel	1	\$215.00
...	...	...
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# Integrations

## TRAVEL

Uber for Business



## ACCOUNTING & TAX COMPLIANCE



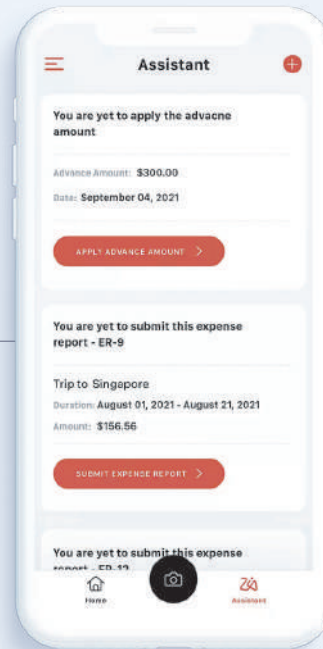
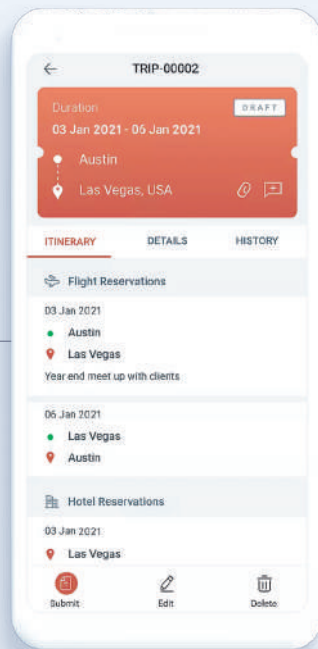
## SALES & HR



## PRODUCTIVITY



# Expense reporting apps for the modern-day business traveler



[zoho.com/expense](https://zoho.com/expense)

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