TALLIE BY EMBURSE CASE STUDY

The Fellows Group

Introduction

This case study of The Fellows Group is based on an August 2020 survey of Tallie by Emburse customers by TechValidate, a 3rd-party research service.

> " The timely (and more accurate) accounting of credit card expenses" is the biggest business impact since starting to use Tallie, says David Fellows, President.

Challenges

Before choosing Tallie, The Fellows Group used:

- Spreadsheets
- Expensify

But the Fellows Group was facing the below business challenges with their expense reporting process.

- Controlling expense budget
- Reconciling credit cards
- Implementing an approval process/workflow
- Ensuring accuracy of data
- Tracking expenses incurred on behalf of clients or non-employees

Ultimately, the Fellows Group chose Tallie by Emburse to solve these challenges.

Use Case

The Fellows Group chose Tallie over Expensify because of Tallie's:

- Ease of use
- Automation
- Efficiency and productivity gains
- ERP and accounting system integration
- "Extremely easy" integration with Bill.com
- "Extremely easy" integrations with Quickbooks Online, Desktop, or Enterprise

The Fellows Group is especially satisfied with the below features and functionalities:

- Mobile app / accessibility
- Credit card transaction management
- Analytics and data transfer
- Approval workflows
- Receipt processing

Organization Profile

Organization:
The Fellows Group

Industry:
Non-profit

About Tallie by Emburse

Tallie is an online expense management tool built with smaller businesses in mind — it is ridiculously easy to use, eliminates accounting mistakes and can be implemented rapidly. Tallie is designed to integrate seamlessly with core financial and accounting systems, such as Bill.com, QuickBooks Online and Desktop, Sage Intacct, NetSuite, or Xero.

Learn More:

 Emburse

Results

Since starting to use Tallie, the Fellows Group has saved 2-4 hours per month and started seeing a return on their investment in 1-2 months. They've also reported being "extremely satisfied" with their experience interacting with Tallie's support team.

Tallie has helped the Fellows Group:

- Save time
- Save money
- Increase productivity
- Improve employee morale

The Fellows Group especially agrees with the following statements:

- Tallie makes it easy to manage and reconcile credit card transactions
- Tallie makes it easy to reimburse employees
- Tallie integrates nicely with their accounting and ERP system
- Tallie has improved their finance team's productivity