



Solution Guide

Key Mobile Considerations for Expense Management Solutions

Introduction

Expense management is, by its very nature, one of the business apps with the greatest requirement for deep mobile functionality. Many software solutions are mainly used in-office, and can often get by with relatively limited mobile functionality for *consuming* data. However, expense management requires a significant amount of *creating* data while on the road – capturing receipts, creating reports and so on.

Therefore, mobile functionality can't simply be a checkbox on an RFP response – it should be assessed as an integral part of your review of global expense management solutions. After all, who hasn't seen a weary road warrior switching from device to device looking to see which one has the most battery life?

This requirement is heightened by the fact that business travelers are increasingly ditching laptops for business trips, in place of tablets and the ubiquitous smartphone. Not only can tablets be left in your carry-on bag at airport security, but with the introduction of web apps and responsive design for business apps means that you can have the same functionality and look-and-feel on a tablet or smartphone as a laptop, and without the need for a separate dedicated app.

With all that said, what expense management capabilities should your solution be able to offer, when accessed from a smartphone or tablet?

Receipt capture

The first and most critical element of a mobile expense solution is receipt capture, so you don't need to keep your receipts incurred on the road. While many solutions offer this to some extent, there can be differences in how you can enter them into the system. Look for a solution that offers you multiple ways of sending receipts and automated real time data extraction, such as direct upload from the device's photo app or the ability to send them to your report via email.

Equally as important is what happens to the receipts once you've sent them into the expense system. Having to manually enter the date, expense type, merchant, currency and amount against each receipt image can become a real drag on long trips, so a solution that uses OCR (optical character recognition) to automatically read the receipt and populate the expense form is a big help.



For expenses such as hotel bills, these capabilities can go even further: simply forward the email with your hotel folio from your smartphone, and it will be automatically parsed and mapped directly into your expense report, so that each element (room, tax, parking, food, etc.) appears as individual line items in your report.

Chrome River proof point: *Chrome River offers several ways to capture receipt images via a mobile device, including quick smartphone photos using our “Snap & Send” function and simple “Forward & Forget” emails of emailed merchant receipts to your expense account (either to create the expense item in near-real time, or simply to complete the item later). Users can also import photos from a device’s photo stream directly into the web app on the mobile device, in order to complete the expense item in real-time.*

Expense report creation and submission

Getting reimbursed quickly requires submitting your expenses promptly – and this can be slowed down if you have to go back to the office to do so, because with some applications it can be challenging to create and submit your form on a mobile device. Using a solution that employs a web app and responsive design to give you the same user experience regardless of what device you use means that it's just as easy to work on a mobile phone, a tablet or a laptop, eliminating this concern.

Chrome River proof point: *Chrome River’s web app-based solution can be accessed via any browser on any mobile device, regardless of operating system or screen size. This enables users to create expense items as easily on their smartphone as their laptop, by simply dragging and dropping receipt images onto an expense report. By using Chrome River’s intuitive OCR capabilities, travelers do not even need to enter item or vendor details, as these are all automatically imported. Reports can also be easily submitted via mobile device, so the approval process can start before travelers even get back to the office.*

Expense report approval

Although most users only need to create and submit expense reports, line managers also require the ability to approve reports on the go, to avoid slowing down the reimbursement process. Therefore, approving expenses needs to be simple and hassle-free. This means having the ability to approve directly from an alert email, or being able to easily approve within the app.

Chrome River proof point: *Chrome River's web app-based solution makes expense report approval just as easy on a mobile device as a desktop or laptop. Emails received in a mobile mail app enable reports to be approved in a single click. Alternatively, approvers that log onto Chrome River onto their smartphone or tablet can simply drill down and view, approve, or decline individual line items.*



Why businesses prefer web apps over mobile apps

While most of us have grown to rely on richly designed apps for a variety of functions, from games to entertainment to productivity, when it comes to accessing business tools, apps rarely give the same level of functionality as the full, desktop browser-based solutions. In addition, the ever-growing line up of handsets, combined with several mobile operating systems, means that there could be a range of different versions of the same app across a large organization.

Not only does this present a considerable training and support headache, but it also means that your users may well be missing out on much of the solution's functionality unless they are back at their desk. Therefore, you should look for an expense solution that allows you to deliver full functionality on any device, regardless of operating system, simply by tapping the icon.

Chrome River proof point: *Chrome River is built using a Single-Page Application (SPA) architecture with HTML 5/CSS 3 and Responsive Web Design (RWD), which makes a web app solution incredibly fluid. It scales the size of the application layout to the resolution, shape and orientation of the device it is displayed on - from smartphones to tablets to laptops to large TV monitors. Users benefit from a consistent experience with full application functionality, across all devices.*

Many users start a task on a smartphone or tablet and end up completing the task on a laptop or desktop. As users move from device to device, they don't expect to re-learn the application just because they are running it on a different device. With Chrome River, users don't have to, because regardless of whether they are on a smartphone, tablet, laptop, or a desktop, the user interface dynamically responds by scaling to display appropriately on the device being used.

Mobile integration with booking tools

Although most trip elements are booked in the office, almost every business traveler has a tale of having to change plans halfway through a trip: extend or cut short the stay; tack on another stop on the itinerary and so on. Although online booking and trip management tools enable you to make itinerary changes from your mobile device, if it's not integrated with your expense management solution, it can make the process of updating your expense report unnecessarily complex.

Chrome River proof point: *Chrome River's deep integrations with online travel technology leaders such as Amadeus, Egencia and Sabre provide more streamlined mobile interactions between booking and expense solutions. The ability to seamlessly move booking and travel receipt data between the booking tool and Chrome River's expense management solution can make travelers' lives significantly more straightforward.*



Capabilities snapshot

Mobility Attributes	Chrome River Web App	Other Vendors' Mobile Apps
Accessible directly via home screen icon on mobile device	●	●
Accept receipts by email or within the expense solution	●	●
Capture and extract receipt data via OCR	●	◐ (varies)
Use of rules to interpret and improve OCR data accuracy	●	◐ (varies)
Same functionality on mobile as full desktop version	●	◐ (varies)
Complete customer / user configurations on mobile app	●	◐ (varies)
Approve / reject individual line items on expense reports	●	◐ (varies)
Always on the latest version	●	○
Single version of app for all users (train users once)	●	○
Same user interface across every device / operating system	●	○
Seamlessly move between any device for task completion	●	○
No mobile device app updates needed by users	●	○

About Chrome River

Chrome River Technologies, Inc. lets business flow for some of the world's largest and most respected global organizations. Our highly-configurable cloud-based expense reporting and supplier invoice automation solutions deliver an elegant and intuitive user interface, which offer the same high quality experience on a smartphone, tablet or laptop. Our SaaS products provide a world-class business rules engine and technology infrastructure, combined with a completely agile solution that supports today's changing business climate, and that CFOs, AP and travel managers, and employees will all love.

To find out why Chrome River is trusted by more than 1 million users at over 500 organizations worldwide, contact us at +1. 888.781.0088 or visit us at www.chromeriver.com.

-  facebook.com/chromeriver
-  linkedin.com/company/chromeriver
-  twitter.com/chromeriver



Chrome River
EXPENSE



Chrome River
INVOICE



Chrome River
AUDIT



Chrome River
ANALYTICS