

AI-POWERED

EXPENSE MANAGEMENT AI AGENT

Built for Microsoft 365 Copilot

Transform Expense Claims from a Manual Process into an Intelligent Conversation

 Simplify expense submission

 Automate policy validation

 Accelerate approvals

 Multi-Language Receipt Extraction
Extract and understand receipt details in multiple languages.

 Custom AI Agent
Powered by
Microsoft 365 Copilot



 Conversational Experience

 Policy Compliant

 Intelligent Automation

 Faster Processing

 Better Visibility

Smarter. Simpler. Intelligent.

Redefine the way your organization manages expenses.

[Learn More About Expense Management AI Agent](#)

Expense Management Shouldn't Be a Manual Chase

Many organizations still rely on a combination of disconnected tools and manual follow-ups.

Organizations rely on a mix of:



Spreadsheets



Emails



Paper or
digital receipts



Shared folders



Manual policy
checks



Multiple approval
follow-ups



Manual
Data Entry



Missing
Receipts



Delayed
Approvals



Policy
Violations



Endless
Follow-ups

Common Challenges



Manual Data Entry

Employees spend valuable time filling forms and entering expense information.



Missing Receipts & Documents

Finance teams repeatedly follow up for incomplete submissions.



Delayed Approvals

Expense requests often remain pending due to emails and manual follow-ups.



Policy Violations

Manual validations can lead to inconsistent enforcement of expense policies.



Limited Claim Visibility

Employees often have no clear visibility into where their claim stands.



Audit & Compliance Complexity

Maintaining a complete and accessible record becomes difficult as organizations scale.

The Result



More
manual
effort



Longer
reimbursement
cycles



Reduced
employee
satisfaction



Increased
compliance
risk

Simply Ask. Upload. Submit. Track.

With Compusoft's **Expense Management AI Agent**, expense management becomes conversational.

An employee can simply interact with the AI Agent and say:

"Submit my hotel expense for ₹8,500."

The AI Agent guides, automates and completes the process.

**Expense Management AI Agent**



Hi! I'm your Expense Management AI Agent. How can I help you today?

10:10 AM

Submit my hotel expense for ₹8,500.

10:11 AM ✓✓



Sure! Please upload your receipt.

10:11 AM



Hotel_Invoice.jpg
245 KB

✓



Extracting details...

10:12 AM

Extracted Details

Merchant	Ocean View Hotel
Date	12 May 2025
Amount	₹8,500.00
Category	Hotel Stay

Is this correct?

Yes, Submit

Edit Details

Type a message...



From Receipt to Reimbursement



- 01 Upload**

Upload the expense receipt or supporting document.
- 02 Extract**

The AI Agent captures relevant expense information.
- 03 Validate**

Expense details are checked against predefined company policies.
- 04 Submit**

The expense claim is created and submitted.
- 05 Route**

Approval requests are automatically routed to the appropriate stakeholders.
- 06 Track**

Employees can check the real-time status of their claims through conversation.



One Conversation. End-to-End Automation.

No complex forms.
No separate portals.
No unnecessary manual steps.



Conversational
Experience



Policy-Aligned
Submissions



Faster
Approvals



Complete
Visibility

Intelligent Capabilities. Seamless Experience.

Our Expense Management AI Agent brings intelligence to every step of the expense management lifecycle.

01

Conversational Expense Submission

Employees can submit expenses by simply chatting with the agent in natural language.

Expense Management AI Agent

Hi! How can I help you today?

Submit my hotel expense for ₹8,500 from Mumbai trip.

Sure! Please upload your receipt.

Type a message...

02

Intelligent Receipt Processing

AI-OCR extracts key details from receipts accurately, including amount, date, vendor, tax and category.

Ocean View Hotel
Mumbai

INVOICE

Invoice No. INV-1258

Date 12 May 2025

Guest Rajesh Kumar

Amount ₹8,500.00

Tax (18%) ₹1,296.61

Total ₹9,796.61

Vendor

Date

Amount

Tax

Total

03

Automated Policy Validation

Automatically checks expenses against company policies, rules and compliance guidelines in real time.

Policy Check

Compliant

Within Daily Limit ₹8,500 / ₹10,000

Hotel Category Compliant

Advance Adjustment Compliant

Receipt Attached Compliant

04

Approval Process

Submit claims and route them to the right approvers with a streamlined approval process.

Expense Claim ₹8,500 • Hotel

Reporting Manager Approval

Finance Approval

Reimbursement Initiated

05

Real-time Claim Tracking

Employees can track the status of their claims in real time through the agent.

My Claim Status

Submitted 12 May 2025, 10:30 AM

Manager Approval 12 May 2025, 11:15 AM

Finance Approval 12 May 2025, 02:45 PM

Reimbursement Initiated 12 May 2025, 03:00 PM

06

Audit-ready Expense Management

Every transaction is logged and archived securely for complete audit trail and compliance readiness.

Audit Trail

Claim Submitted By Rajesh Kumar 12 May 2025, 10:30 AM

Manager Approved By Arjun Mehta 12 May 2025, 11:15 AM

Finance Approved By Neha Sharma 12 May 2025, 02:45 PM

Reimbursement Initiated By System 12 May 2025, 03:00 PM

07

Multi-Language Receipt Extraction

EN INVOICE
Hotel Blue Sea
Date: 12 May 2025
Total Amount ₹8,500.00

HI चालान
होटल ब्लू सी
दिनांक: 12 मई 2025
कुल राशि ₹8,500.00

MR चलन
हॉटेल ब्लू सी
दिनांक: 12 मे 2025
एकुण रक्कम ₹8,500.00

TA விலைப்பட்டியல்
ஹோட்டல் ப்ளூ சீ
தேதி: 12 மே 2025
மொத்த தொகை ₹8,500.00

TE ಇನ್ನಿಯನ್
ಹೋಟಲ್ ಬ್ಲೂ ಸಿ
ತೇದಿ: 12 ಮೇ 2025
ಮೊತ್ತದ ಮೊತ್ತಾಕು ₹8,500.00



Built for Microsoft 365 Copilot

Native experience across Teams, Outlook, SharePoint and the Microsoft 365 ecosystem.

Teams

Outlook

SharePoint

Power Automate

Copilot Studio

Conversational Experience

Policy Compliant

Intelligent Automation

Faster Processing

Better Visibility

Smarter. Simpler. Intelligent.

Redefine the way your organization manages expenses.

From Time-Consuming to Effortless. See the Difference.

See how our Expense Management AI Agent transforms the way employees manage business expenses.



Scenario

Rahul, a Sales Manager, travels to meet a client in another city. He incurs expenses on travel, hotel and meals, and needs reimbursement.



Travel
Flight
Cab



Stay
Hotel



Meals
Client Dinner
Food

Traditional Process

VS

AI Agent Experience



01

Collect & Compile

Rahul collects receipts and enters details in a spreadsheet or form.



02

Email & Follow-Up

Sends the claim to approver via email and waits for acknowledgment.



03

Manual Review

Finance manually checks details, policies and supporting documents.



04

Back & Forth

More information requested. Rahul shares and replies over emails.



05

Approval Delay

Approvals happen with delays due to busy schedules or missing info.



06

Limited Visibility

Rahul has no real-time visibility into claim status.



Outcome: Longer cycle time, manual effort, delays and frustration.



01

Conversational Submission

Rahul chats with the Expense Management AI Agent in Teams / Copilot.

"Submit my hotel and travel expenses from Mumbai trip."



02

Upload Receipts

He uploads receipts or forwards emails. AI Agent extracts details instantly.



03

Policy Validation

AI Agent validates expenses against company policies in real time.

✓ Compliant



04

Smart Routing

Claim is automatically routed to the right approver.



05

Faster Approval

Approver gets complete context and approves in one click.

✓ Approved



06

Real-Time Tracking

Rahul can check claim status anytime through conversation.



Outcome: Faster reimbursement, fewer follow-ups, happier employees.

A Better Experience for Everyone



Employees

Simple, conversational and transparent



Managers

Quick insights and easy approvals



Finance Teams

Automated, accurate and audit-ready



Organization

Higher compliance, lower cost, better control

Measurable Impact. Meaningful Results.

Our Expense Management AI Agent drives efficiency, ensures compliance and delivers tangible business outcomes.



60-70%

Faster Claim Processing

Significantly reduces the time from submission to reimbursement.



80%

Reduction in Manual Effort

Automates manual tasks like data entry, validation and follow-ups.



100%

Policy Compliance

Ensures every claim is checked against company policies in real time.



90%

Fewer Follow-Ups

AI-powered automation reduces back-and-forth between employees and finance teams.



100%

Better Visibility

Real-time tracking and dashboards for complete transparency.

Business Value You Can See



Improved Productivity

Employees spend less time on paperwork and more time on meaningful work.



Stronger Compliance

Built-in policy checks and audit trails ensure governance and regulatory readiness.



Lower Costs

Reduced manual effort, processing time and reimbursement costs.



Higher Employee Satisfaction

Simple, conversational experience with faster reimbursements.



Sustainable Operations

Less paper, fewer emails and smarter processes contribute to a greener organization.



Why It Matters

Every day of delay, every manual step and every missed policy check adds cost and risk to your business.



Empower Employees

Simple, conversational experience that employees love.



Enable Finance Teams

More time for analysis, less time on transactions.



Ensure Control & Compliance

Built-in governance with complete audit readiness.



Drive Better Decisions

Real-time insights to optimize spend and budgets.



Scale with Confidence

A future-ready solution that grows with your organization.

Built to Adapt. Designed for Every Industry.

Our Expense Management AI Agent is industry-agnostic and designed to meet the unique expense management needs of every organization.

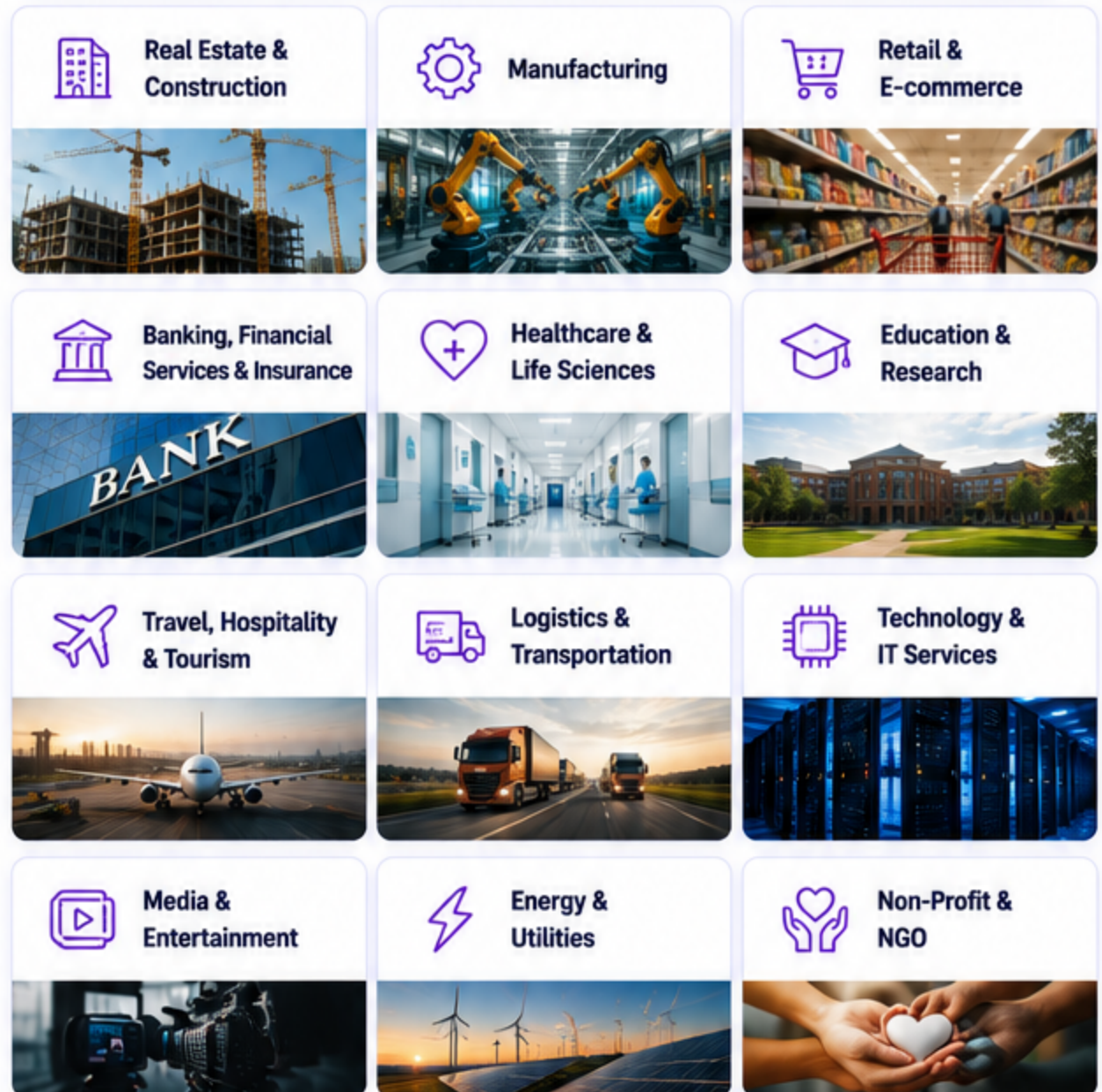


One Solution. Unlimited Possibilities.

Whether you're managing employee travel expenses, project costs, client visits or operational spend – our AI Agent adapts to your policies, processes and industry needs.

- ✓ Configurable for industry-specific policies & compliance
- ✓ Scalable for organizations of all sizes
- ✓ Continuously evolving with AI innovation

Multiple Industries. One Intelligent Platform.



Works Across Departments. Delivers Value for Every Role.



Employees

Simple, conversational submission and real-time status updates.



Managers

Faster approvals with complete visibility and control.



Finance Teams

Automated validation, policy compliance and accurate reporting.



Audit & Compliance

Audit-ready records and complete transparency.



IT Teams

Easy to deploy, integrate and scale across the organization.

Powered by Microsoft 365 Copilot

Intelligent. Secure. Seamless.

Built on the power of Microsoft 365, our Expense Management AI Agent delivers enterprise-grade security, seamless integration and a natural conversational experience.



Native in Teams

Works where your teams collaborate.



Enterprise Security

Built on Microsoft 365 security & compliance.



Seamless Integration

Connects with your existing systems.



AI-Powered Intelligence

Continuously learns and improves.



Scalable & Future-Ready

Grows with your business needs.



Your Data. Always Protected.

Enterprise-grade security, compliance and privacy you can trust.

Trusted Expertise. Proven Partnerships.

Compusoft Advisors combines deep domain knowledge, Microsoft expertise and a customer-first approach to help you modernize expense management with confidence.



28+

Years of Excellence

Delivering enterprise solutions since 1997



**Microsoft
Solution Partner**

Recognized expertise across Microsoft cloud & AI



500+

Successful Implementations

Across Industries and Geographies



**End-to-End
Support**

From advisory to implementation and ongoing support

Built on Microsoft. Delivered by Compusoft.

Our Expense Management AI Agent is built on the power of Microsoft 365 Copilot, Power Platform and Azure, ensuring enterprise-grade security, scalability and seamless integration.



**Microsoft 365
Copilot**

Conversational AI experience



**Microsoft
Dataverse**

Secure data foundation



**Power
Automate**

Intelligent workflow automation



Power BI

Actionable insights and reporting



**Microsoft
Azure**

Enterprise-grade security & scale

Recognition that Inspires Us

Proud to be recognized by leading platforms for our innovation and customer success.



**Microsoft Copilot
Agent Build2Boost Hackathon 2024**
'26AS TDS Reconciliation using AI'
– 1st Place



Microsoft Solutions Partner
Business Applications | Modern Work
Data & AI | Infrastructure



Industry Awards & Recognition
ISODA | IAMCP | CRN Excellence Award
SME Channels | Microsoft Awards



Our Differentiators



AI-First Approach

We leverage AI to automate, simplify and transform business processes.



Domain Expertise

Deep understanding of finance operations, compliance and industry best practices.



Accelerated Delivery

Pre-built frameworks and accelerators ensure faster time-to-value.



Security & Compliance

Built on Microsoft Cloud with enterprise-grade security and governance.



Long-Term Partnership

We grow with you—driving continuous improvement and innovation.

Let's Build Intelligent Expense Management Together

Transform the way your organization manages expenses with Compusoft's AI-Powered Expense Management Agent.



Book a Demo
Experience the AI Agent in action



Talk to Our Experts
Get personalized consultation



Start Your Journey
Move towards smarter, faster and compliant expense management



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