



SequelExpense



AI Driven Automated Travel and Expense Management Platform

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SequelExpense



Dashboard

Home / Dashboard

Travel Expense + General Expense ... My Claims Reports

Direct Chat 3 x Latest Requests 8 New Members x

Amit Kumar 23 Aug 2:00 pm
Hi, This is Amit

23 Aug 2:05 pm
Hi Amit. Pls tell

Amit Kumar 23 Aug 5:37 pm

Amit Kumar Yesterday
VishaL. Sharma Yesterday
Ana 12 Aug
Pankaj 10 Aug
Piyush
Surbhi 14 Jul
Carol 13 Jul
Nora 15 Jul

View All Users

Travel Expense Mgmt. Manager1

Welcome Back !
10th Sep, 2023

Requests Submitted 9 Requests Approved 4 Pending Approvals 5

Pre-Travel Request Submission Post-Travel Expense Submission New General Expense Submission View Reports Travel/General Expenses

Latest Submissions

Trip/Expense ID	Date Submitted	Submitted By	Grade	Status	Action
<input type="checkbox"/> T237-070923022309	07-09-2023	Abhinav..	B	Approved	View Details
<input type="checkbox"/> T237-060923102336	06-09-2023	Abhinav..	B	Approved	View Details
<input type="checkbox"/> T237-060923033000	06-09-2023	Abhinav..	B	Approved	View Details
<input type="checkbox"/> T237-060923030331	06-09-2023	Abhinav..	B	Processing	View Details

Key Components and Features

- **Travel Booking and Reservation:**
 1. Online booking tools for flights, hotels, rental cars, and other travel services.
 2. Integration with various travel providers and agencies to offer a wide selection of options.
 3. Real-time availability and pricing information.
- **Expense Management:**
 1. Expense report creation and submission.
 2. Receipt capture through mobile apps or scanning tools.
 3. Integration with credit card accounts for automatic expense import.
 4. Expense categorization and allocation.
- **Policy Enforcement:**
 1. Enforcement of corporate travel policies to ensure compliance.
 2. Alerts and notifications for policy violations.
 3. Automated approval workflows for expense reports.
- **Receipt and Document Management:**
 1. Attachment of receipts, invoices, and supporting documents to expense reports.
 2. Optical Character Recognition (OCR) for receipt data extraction.
 3. Digital receipt storage and retrieval.
- **Integration and API Support:**
 1. Integration with accounting, ERP, and HR systems for seamless data transfer.
 2. API support to connect with third-party applications and services.
 3. Integration with travel booking platforms.
- **Analytics and Reporting:**
 1. Reporting dashboards with insights into travel spending and expense trends.
 2. Customizable reports for financial analysis.
 3. Exporting and sharing of reports

Key Components and Features

- **Mobile Accessibility:**
 1. Mobile apps for booking, expense submission, and receipt capture on-the-go.
 2. Mobile approval workflows for managers.
- **Vendor and Payment Integration:**
 1. Integration with payment gateways for expense reimbursement.
 2. Direct billing or payment arrangements with travel service providers.
- **Data Security and Privacy:**
 1. Strong data security measures to protect sensitive financial and personal information.
 2. Compliance with data protection regulations (e.g., GDPR, HIPAA).
- **Multi-Currency Support:** ✓
 1. Real-time currency conversion for international travel expenses.
 2. Support for multiple currencies and exchange rates
- **User Profiles and Preferences:**
 1. User-specific travel preferences and profiles for a personalized booking experience.
 2. Traveller profiles for storing frequent traveller information.
- **Travel Itinerary Management:**
 1. Centralized management of travel itineraries and bookings.
 2. Notifications and updates for flight changes or cancellations.
- **Compliance and Audit Trails:**
 1. Detailed audit trails for expense tracking and compliance verification.
 2. Data retention and compliance with regulatory requirements
- **User Training and Support:**
 1. Training resources and user support for travelers, approvers, and administrators.
 2. Helpdesk or customer support for issue resolution.



Pre-trip Authorization	Travel Booking Integration	Itineraries	Guest House Integration
Creates travel requests with estimated expenses, and sends for approval prior to the trip. If approved, the pre-trip request can then be converted into an expense report, eliminating the need to re-key the data.	Book flights, hotels, and cars directly from SequelExpense and automatically import trip data into your expense report. Integrated travel & expense allows for a seamless flow of data between the solutions and makes it easy for you to track travel data when needed.	Manage your itineraries from end-to-end with SequelExpense and Travel solution. Get the best deals, track statuses, and gain invaluable insights into travel spend.	Has a feature of Integrating Guest House API if provided by enterprises into the SequelExpense platform, which can enhance the travel and expense management process for users.

Dedicated Travel Agent to Assist the Booking

•Personalized Support: Users can access dedicated travel agents for personalized assistance with complex travel itineraries, special requests, or any travel-related inquiries.

•Expert Advice: Travel agents can provide expert advice on travel options, destinations, and cost-saving strategies, enhancing the overall travel experience.

•Assistance with Changes: Travel agents can help users make changes to existing bookings, such as flight modifications or hotel extensions.

Integration with Travel Portals through APIs:

By offering both dedicated travel agent support and the ability to connect with other travel portals through APIs, SequelExpense provides users with flexibility, personalization, and a comprehensive solution for their travel booking and expense management needs.

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Detailed Features

Trips

- Travel requests
- Itinerary management
- Mark Itinerary as personal
- Travel policy
- Travel allowance/advance automation
- Traveller profile management
- Travel document management
- Corporate Travel desk management
- Travel agent allocation
- Share offline ticket options
- Ticket Cost approval
- GDS PNR parsing
- Travel manager
- Attendance marking on HRMS

Approvals

- Simple approval
- Approval delegation
- Overdue reminders
- Hierarchical approval
- Grade based approval
- Designation based approval
- Project based approval
- Exceptional approvals
- Adhoc approvers
- Parallel approval routing
- Custom approval workflows
- Automatic approvals/rejection
- Approval Overdue workflow
- Approval hierarchy sync from HRMS

Receipts and Expenses

- Bulk upload receipts
- Offline upload (mobile apps)
- Multi-currency expenses
- Automatic exchange rate conversion
- Mileage Expenses
- Mileage tracking via GPS
- Billable expenses
- Automated Expense reminders
- GST tracking
- Receipt Auto Scan
- Receipt storage limit
- Receipt forwarding email address
- Expense delegation
- Per Diem Automation



Coming Soon



Road Map



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Detailed Features

Allocations	Expense reports	Control
<ul style="list-style-type: none">• Customer• Project• Accounting codes• Tags• Attendees• Cost Centers• Locations• Custom codes	<ul style="list-style-type: none">• Cost allocation• Expense report PDF• Excel/CSV download• Cash Advances• Trip allocation• Report types• Expense report automation• Report submission reminders• Auto-submission of expense reports	<ul style="list-style-type: none">• Number of policies• Expense rules• Duplicate detection• Hard copy receipt collection• Custom rules• Blocking rules• Expense audit• Fraud detection• Verifier role COMING SOON
Payment/Settlement	Business/Finance Operations	Collaboration
<ul style="list-style-type: none">• Manual reimbursement• Direct deposits (US, Canada, and India)• Bank file export• Syncing settlement file to any ERP/payroll software• Automated settlement notifications• Bulk Payments COMING SOON	<ul style="list-style-type: none">• Custom report export• Multi-location management• Multi-branch management*• Multi-GSTIN support (India only)*• Multiple Base currency• Branch Admin user role COMING SOON• Custom configurations	<ul style="list-style-type: none">• Comments• Common chat bar• Initiate contextual chat conversation COMING SOON• In-app notifications



Data Administration	Customization	Mobile apps
<ul style="list-style-type: none"> • Data and receipt backup • Scheduled backup • Default user roles: <ul style="list-style-type: none"> – Submitter – Approver – Admin – Accountant COMING SOON – Travel Desk COMING SOON • Custom report export • Bank file export • Custom user roles <p style="text-align: center;">Security</p> <ul style="list-style-type: none"> • SSL encryption • Multi-factor authentication • Role-based access permission • Single Sign On (SAML) • IP Restriction 	<ul style="list-style-type: none"> • Basic form customization • Custom user roles • Custom Views • Web tabs • Additional fields • Lookup fields • Page Layouts • Custom Modules • Custom buttons • Custom links • Custom schedulers • Related Lists 	<ul style="list-style-type: none"> • iOS • Android • iPad • Mac • Apple watch ✓ <p style="text-align: center;">Budget Management</p> <ul style="list-style-type: none"> • Budget vs Actuals report • Budget insights during approval CO ✓ • Set Budget threshold ✓ • Threshold Exceeded alerts ✓ • Block approval based on threshold limits ✓



Coming Soon



Road Map



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Detailed Features

Cards ✓

- Connect personal cards
- Card statement upload
- Corporate Card Management
- Commercial card feeds (Amex, Mastercard, Visa and HSBC)
- Automatic assignment of card owners COMING SOON
- Auto matching
- Auto categorization based on MCC COMING SOON
- Flag personal expense on corporate cards
- Card spend dashboard for Admins
- Corporate card reconciliation dashboard
- Automated reminders

Expense reports

- Cost allocation
- Expense report PDF
- Excel/CSV download
- Cash Advances
- Trip allocation
- Report types
- Expense report automation
- Report submission reminders
- Auto-submission of expense reports

Business/Finance Operations

- Custom report export
- Multi-location management
- Multi-branch management*
- Multi-GSTIN support (India only)*
- Multiple Base currency
- Branch Admin user role COMING SOON
- Custom configurations



Coming Soon



Road Map

Control

- Number of policies
- Expense rules
- Duplicate detection
- Hard copy receipt collection
- Custom rules
- Blocking rules
- Expense audit
- Fraud detection
- Verifier role COMING SOON

Collaboration

- Comments
- Common chat bar
- Initiate contextual chat conversation ✓
- In-app notifications



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Detailed Features

Automation	Audit and Compliance	Customization
<ul style="list-style-type: none"> • Approvals • Workflow rules: <ul style="list-style-type: none"> – Alerts (Email / In-app notifications) – Webhooks – Field updates – Custom functions • Expense report automation • SMS Notification (India only) 	<ul style="list-style-type: none"> • GDPR ✓ • SOC 2 Type 2 ✓ • ISO 27001 ✓ • ISO 9001 ✓ • Data and receipt backup • Scheduled backup • Manage PII data • Tax compliance • Sunshine Act (US only) ✓ • Mileage rates ✓ • Basic audit trail report ✓ • Auditor role ✓ • Custom Exchange Rates ✓ • Per diem rates ✓ • Advanced audit trail report ✓ 	<ul style="list-style-type: none"> • Basic form customization • Custom user roles • Custom Views • Web tabs • Additional fields • Lookup fields • Page Layouts • Custom Modules • Custom buttons ✓ • Custom links ✓ • Custom schedulers ✓ • Related Lists ✓
<p>Purchase Request</p> <ul style="list-style-type: none"> • Requisition forms ✓ • Items ✓ • Multi-level Approvals ✓ 		



Coming Soon



Road Map



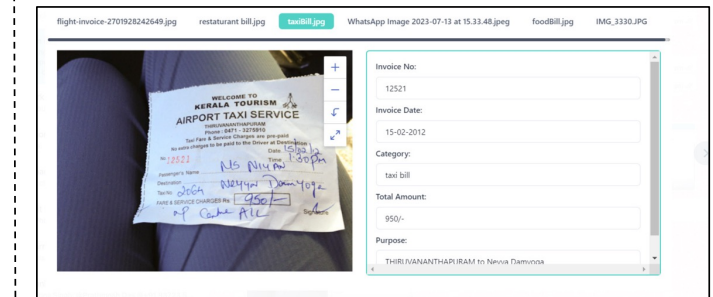
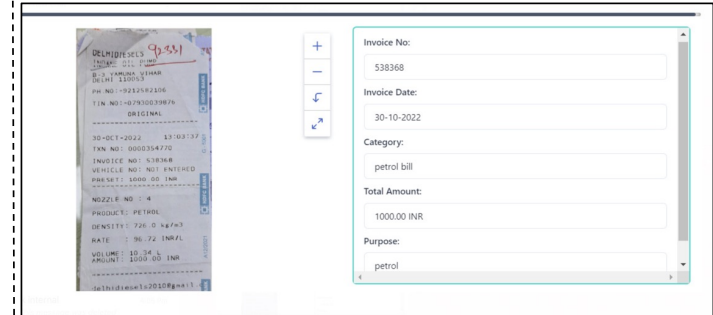
AI Powered OCR & Receipt Management

A. Template-less Data Extraction & Receipt Management Capability

- **No need for predefined templates or forms;** the platform can intelligently extract relevant information from various types of receipts and documents.
- Automatically identifies key details like date, amount, merchant, and description from handwritten and printed sources.
- **Receipt Upload:** Employees can upload digital receipts and attach them to expense claims.

A. Handwritten Receipt Capture:

- Capture and process handwritten receipts with high accuracy, eliminating the need for manual data entry.
- Supports various languages and handwriting styles.
- Cutting-edge OCR technology that can accurately extract text **from handwritten receipts, documents, and images.**
- Converts **handwritten data into digital format** for seamless processing.



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Key Features

AI Powered OCR & Receipt Management



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Detailed Features

Integration		Integration		Integration	
– Accounting and ERP	✓	– Ride Hailing apps	✓	– Direct feeds	
• Zoho Books	✓	• Uber	✓	• RuPay	✓
• QuickBooks Online	✓	• Lyft	✓	• Visa	✓
• Xero	✓	• OLA	✓	• Mastercard	✓
• Sage Accounting (UK only)*	✓	• Bolt	✓	• AMEX	✓
• QuickBooks Desktop (US and Canada only)	✓	– VAT Reclaim	✓	– Cloud storage	
• Oracle		• Taxback International	✓	• Zoho Docs	✓
• SAP		• WAY2VAT		• Dropbox	✓
• Netsuite	✓	– Zoho Suite	✓	• box	✓
• Microsoft Dynamics		– Other integrations		• Google Drive	✓
– Online reimbursement		• G Suite	✓	• OneDrive	✓
• CSG Forte (US and Canada)	✓	• Office 365	✓	• Evernote	✓
• ICICI Bank (India)	✓	• Slack	✓		
• HSBC Bank (India)	✓	• Amazon Business (US only)	✓		
• HDFC Bank	✓				
– Travel	✓				
• Sabre GetThere	✓				
	✓		✓		
		Coming Soon		Road Map	



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