

Expense Management Agent



Overview

The Expense Management Agent by Unify Dots, powered by Microsoft Copilot enables organizations to streamline expense claim processes with AI-driven automation, low-code workflows, and intelligent compliance checks.

Features

Expense Claim Creation

Create expense claims by interacting with the Agent and uploading receipts. Intelligent scanning technology automatically extracts key details such as date, amount, and currency from receipts and populates the claim fields. Automatically assign the correct expense type, reducing manual errors. Multi-currency support ensures seamless processing for global organizations.

New Expense Claim

Review your details and submit your expense claim for approval.

Employee Name: Kalpana Kumari
Employee ID: kalpana@unifydots.com

Business Unit: Sales

Business Justification *: Holiday Gift for Customer

Expense Type *: Entertainment & Gifts

Receipt File: Wine Gift_205GD.jpg

Supplier *: Wine Trade Asia Pte Ltd.

Expense Date *: 08/23/2024

Expense Total Amount *: 20

Currency *: SGD

Tax Amount: 1.65

Tax Code: GST

Description (Comment): Wine Bottle Gift

Submit Claim

Expense Claim ID: K-1056 created. Now initiating approval process.

Approval process started. Thank you.

Did that answer your question?

Yes No

Wine Trade Asia Pte Ltd.
Wine Consultant - Andor Point Mall
370 Alexandra Road #B1-35
Singapore 119953
GST Reg. No: 200030677W
TEL: +65 476-8997
FAX: +65 476-3680

TAX Invoice

Invoice#: ANPWED09076
Date: Friday, August 23, 2024
Customer: ANPW
Andor Point - POS Terminal

Item Code	Qty	Price	Discount	Total Price
BUT03	1	18.35		18.35
PHILIPPE LÉ HARDY PUNISHY CHARDONNAY				

Payment Receipt

Payment amount: 145.00
Paid via: VISA/VISA
By: ANPW Oper ANPW
Date: 2024-08-23 15:55:01

Sub-Total	18.35
Discount	0.00
GST	1.65
Total Paid:	20.00
Inv Rounding:	0.00
Total Quantity:	1.00

Expense Classification

Classify expense types and categories to ensure accurate tracking and compliance with corporate policies.

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☐	Code ↑	Description ↓	Created By ↓	Created On ↓
☐	ENTMNT_GIFTS	Entertainment & Gifts	KK Kalpana Kumari (...)	11/12/2025 1:15 PM
☐	MISC	Miscellaneous	KK Kalpana Kumari (...)	11/12/2025 1:15 PM
☐	OP_EXP_RETAIL_COMM	Operating Expenses - Retail/Commercial Office	KK Kalpana Kumari (...)	11/12/2025 1:15 PM
☐	OP_EXP_SERVICE_APTMNT	Operating Expenses - Service Apartment	KK Kalpana Kumari (...)	11/12/2025 1:15 PM
☐	STAFF_WELFARE	Staff Welfare	KK Kalpana Kumari (...)	11/12/2025 1:15 PM
☐	TRAVEL_LOCAL	Traveling - Local	KK Kalpana Kumari (...)	11/12/2025 1:15 PM
☐	TRAVEL_OVERSEAS	Traveling - Overseas	KK Kalpana Kumari (...)	11/12/2025 1:15 PM

Business Units

Define, structure, and manage multiple business units within the organization. This feature is essential for organizations operating in diverse regions or managing multiple departments under a unified expense management framework.

Power Apps

Expense Claim Management App

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expensedemo

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Authorization Limits

Define expense authorization thresholds across the organization. Administrators can configure limits based on approver roles, expense types, and business units to ensure adherence to corporate policies.

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📄 Run Report

Active ExpenseAuthRules*

Edit columns

☐	Business Unit...	ExpenseType	Approver	Amount From	Amount To	Currency
☐	Sales	TRAVEL_LOCAL	Shanelle Carmela Gavina (Away)	\$0.00	\$500.00	Singapore Dollar
☐	Sales	ENTMNT_GIFTS	Shanelle Carmela Gavina (Away)	\$0.00	\$150.00	Singapore Dollar
☐	Delivery	TRAVEL_LOCAL	Jicky Manalaysay (Away)	\$0.00	\$1,000.00	Singapore Dollar
☐	Delivery	TRAVEL_OVERSEAS	Jicky Manalaysay (Away)	\$0.00	\$1,000.00	Singapore Dollar
☐	Sales	TRAVEL_OVERSEAS	Shanelle Carmela Gavina (Away)	\$0.00	\$500.00	Singapore Dollar
☐	Sales	MISC	Shanelle Carmela Gavina (Away)	\$0.00	\$500.00	Singapore Dollar
☐	Sales	ENTMNT_GIFTS	Manish Chhalani (Away)	\$151.00	\$300.00	Singapore Dollar
☐	Sales	ENTMNT_GIFTS	Sandeep Walia (Away)	\$301.00	\$500.00	Singapore Dollar
☐	Sales	TRAVEL_LOCAL	Manish Chhalani (Away)	\$501.00	\$2,500.00	Singapore Dollar
☐	Sales	TRAVEL_OVERSEAS	Manish Chhalani (Away)	\$501.00	\$2,500.00	Singapore Dollar
☐	Sales	MISC	Manish Chhalani (Away)	\$501.00	\$2,000.00	Singapore Dollar
☐	Delivery	TRAVEL_OVERSEAS	Donna Puig (Away)	\$1,001.00	\$2,500.00	Singapore Dollar
☐	Delivery	TRAVEL_LOCAL	Donna Puig (Away)	\$1,001.00	\$2,500.00	Singapore Dollar
☐	Delivery	TRAVEL_OVERSEAS	Sandeep Walia (Away)	\$2,501.00	\$10,000.00	Singapore Dollar
☐	Sales	TRAVEL_LOCAL	Sandeep Walia (Away)	\$2,501.00	\$10,000.00	Singapore Dollar
☐	Delivery	TRAVEL_LOCAL	Sandeep Walia (Away)	\$2,501.00	\$10,000.00	Singapore Dollar

Rows: 18

Rows: 18

Approvals

Implement dynamic approval workflows tailored to organizational authorization limits. Ensure that expense claims are routed to the appropriate approvers based on predefined policies and thresholds.

▼ Status: Requested



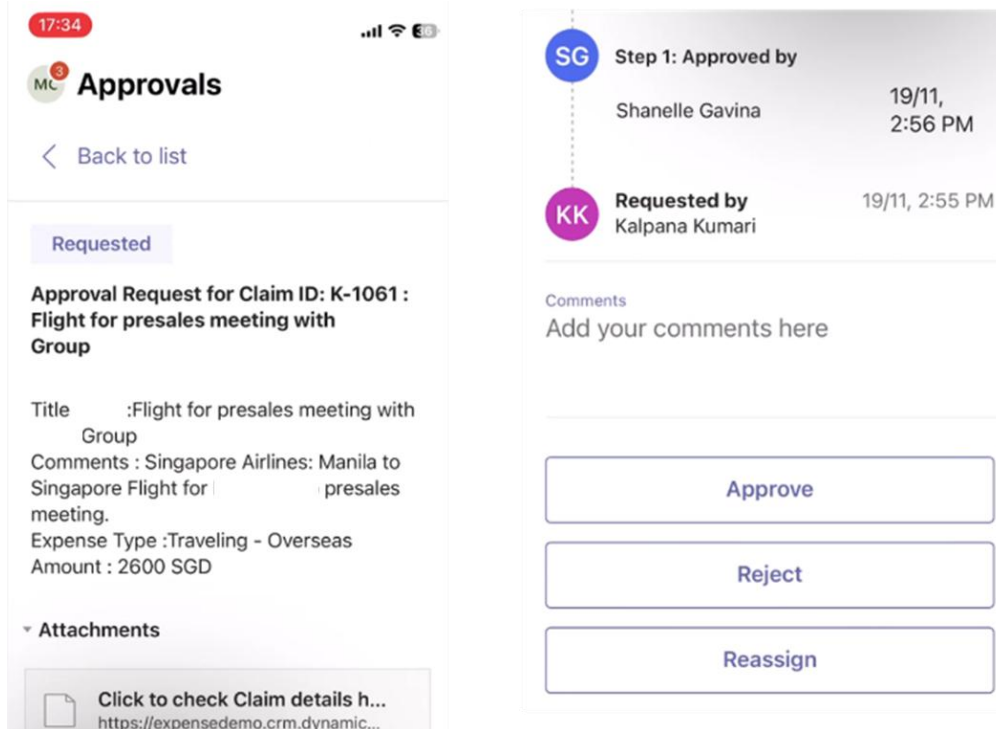
11/19/2025 10:33:24 AM

Cancel request

Follow up

Mobile Support

Access the Expense Management Agent through your mobile, allowing users to submit claims, upload receipts, and track approval status on the go. The mobile app ensures convenience and productivity for employees working remotely or traveling. Real-time notifications are delivered through email and Microsoft Teams, enabling prompt review and faster decision-making.



The image shows a mobile app interface for expense management. On the left, a screen titled 'Approvals' shows a 'Requested' status for a claim with ID K-1061. The title is 'Flight for presales meeting with Group'. The comments mention 'Singapore Airlines: Manila to Singapore Flight for presales meeting'. The expense type is 'Traveling - Overseas' and the amount is '2600 SGD'. There is a link to check claim details. On the right, a detailed view of the approval process shows 'Step 1: Approved by' Shanelle Gavina on 19/11 at 2:56 PM. It also shows 'Requested by' Kalpana Kumari on 19/11 at 2:55 PM. There is a 'Comments' section with the text 'Add your comments here' and three buttons: 'Approve', 'Reject', and 'Reassign'.

Benefits

- **Efficiency:** Automates expense submission and approval processes, reducing manual effort.
- **Accuracy:** Intelligent data capture and classification minimize errors and improve compliance.
- **Scalability:** Supports multi-business unit and multi-currency operations for global organizations.
- **Transparency:** Maintains audit trails for submissions, approvals, and changes to ensure accountability.
- **Microsoft Ecosystem:** Seamlessly integrates with Microsoft Power Platform, including Power Automate, Power Apps, Microsoft Teams for workflow automation and notifications.
- **ERP Integration:** Connects with finance and ERP systems to ensure end-to-end expense management and financial reconciliation.



Unifying the Dots in your Business



About Unify Dots

Unify Dots helps you connect the Dots by providing solutions that enable digital transformation. Unify Dots is a Microsoft Solution Partner specializing in AI powered Business Applications.

AI and Agents	Finance, Accounting, Treasury, Budgeting, Financial Reporting	Supply Chain, Order Management, Manufacturing and WMS	CRM: Sales, Service, Field Service
Human Resources Management and Talent	Project Operations	Customer Experience - Customer Data Platform and Marketing	Ecommerce and Retail / Point of Sale
Power Platform – Power Apps, Automate	Data Analytics and Business Intelligence	Contract Management – Vendor Contracts, Customer Contracts	Industry Accelerators – Agri, Insurance, Telecom, Real Estate, Maritime

Unify Dots has local presence in Asia Pacific, Australia, New Zealand, Europe, North America and operate in a global scale with a local touch. Unify Dots is also committed to improving the world and has pledged donating at least 25% of its profit towards the cause of helping educate children from low-income families in developing countries.

Contact Unify Dots

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