



Championed transformation from a legacy system to a modern solution, streamlining expense capture and management for a leading expense management software provider

About the Client

Founded in 2001, the client is a leading provider of global travel and expense management solutions to large enterprises

Aims to simplify business expense management while ensuring compliance with country-specific taxation and legal regulations with flexible SaaS solutions

Serves 3,000+ customers across industries, with 1.7 million users in over 100 countries

Business Needs

1 Upgrade legacy applications to modern technologies

2 Enable seamless support across desktop and mobile devices

3 Facilitate compatibility with core legacy COM components

4 Support customization and configuration to align with diverse client needs

5 Develop an end-to-end expense management application

6 Support diverse compliance standards tailored to client-specific locations

7 Digitize expense management workflow

8 Design a flexible solution that adapts to healthcare expense regulations

9 Implement a simplified and streamlined expense approval process

Solutions



Facilitated automation of the following tasks:

- Expense capturing with AI to scan digital receipts and extract VAT, net and gross amounts, merchant details, and payment information
- Report generation by directing credit card transaction feeds from banks to create transactions effortlessly and automatically matching receipts to card transactions
- Validation and verification of expenses against a set of pre-configured customizable rules
- Approvals based on predefined criteria
- Detection of confirmed and potential violations, providing controllers and approvers with quick assessments
- Data reporting for authorities to check on anomalies, track compliance, and gain specific actionable insights

Created an integrated ecosystem combining accounting, OCR AI, banking, and cards to streamline and enhance efficiency

Technology Stack



Business Impact

Enabled **70% faster configuration** with 200 predefined rules

On boarded **50+ clients** annually with optimized UI



Optimized **API usage** to **reduce costs** for Google and Bing services

Achieved a **75% reduction** in client travel expenses

Achieved **99.9% accuracy** in expense creation and control, **reducing manual effort by 80%**

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