



2017

SutiExpense User Guide



Version 7.1.0

SutiSoft, Inc.

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I. Preface

This document is intended for the users of SutiExpense application. It explains the operations involved in creating an expense report, request, adding line items, attaching receipts, sending for approval, and more.

II. About the Application

Features in SutiExpense application are customizable by your administrator. Based on your role in your organization, access privileges are provided to you accordingly. This guide lists down all the available features.

III. Product Overview

SutiExpense, a simple yet powerful online expense management software solution helps organizations create, submit and approve expense reports online. It automates and streamlines the creation of expense reports, approvals and reimbursements from one centralized location. The automated expense management solution saves time and provides greater control over business expenses. The solution is integrated with most commonly used accounting systems and corporate credit cards, allowing CFOs to visualize transaction activities in real-time and better manage financial risk.

The SutiExpense online expense report software integrates advanced business analytics with expense reporting to enable real-time decision making.

The key benefits include:

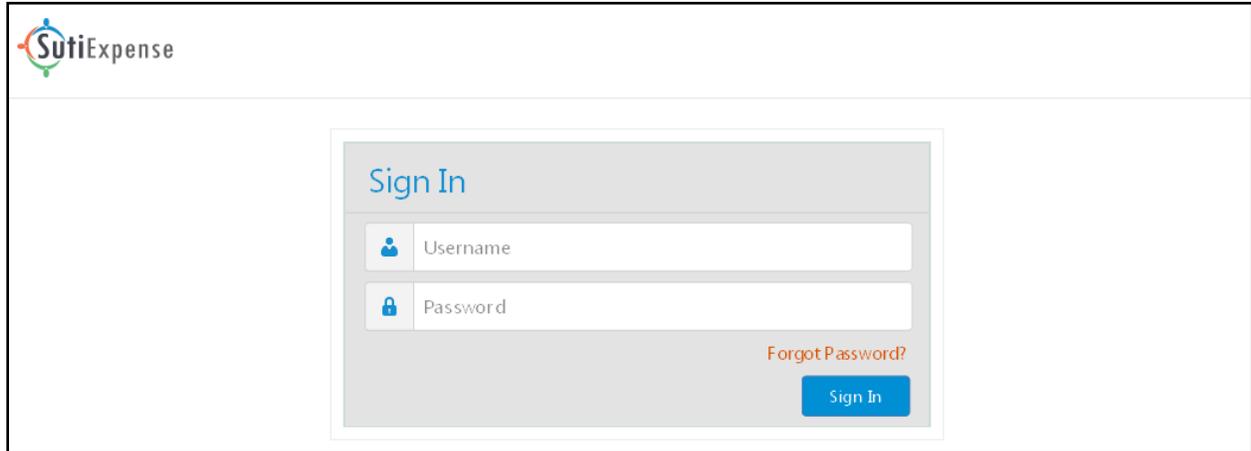
- ✓ Manages day-to-day expenses from anywhere, anytime and on any platform
- ✓ Allows you to spend less time in expense reporting and more time on business activities
- ✓ Reduces approval bottlenecks
- ✓ Enforces company policies and expense limits
- ✓ Provides an integrated travel booking engine
- ✓ Simplifies budget and account management
- ✓ Automates approval flows
- ✓ Provides customizable options
- ✓ Allows different cost centers
- ✓ Expenses can be claimed quickly, even on the go
- ✓ Corporate card monitoring and analysis
- ✓ Online payment gateways
- ✓ Business intelligence reports

IV. Typographic Conventions

Type Style	Icons	Description
Bold Text		Identifies the options and button/icons that allow you to perform an action.
<i>Note</i>		Notes provide extra information about a topic that helps you understand the workflow process.
<i>Tip</i>		Identifies tips in the application.
		Create new record
		Edit operation
		Delete operation

1. Login

1. To login into SutiExpense application:
 - a. In the SutiExpense login page, enter yourusername and password.
 - b. Click **Login**.



The screenshot shows the SutiExpense login interface. At the top left is the SutiExpense logo. The main content area features a 'Sign In' form with a title 'Sign In' in blue. Below the title are two input fields: 'Username' with a person icon and 'Password' with a lock icon. To the right of the password field is a link labeled 'Forgot Password?' in orange. At the bottom right of the form is a blue 'Sign In' button.

2. If you have forgotten your password, do the following:
 - a. In the SutiExpense login page, click **Forgot Password?**
 - b. Enter your registered email address and click **Submit**.
 - c. The password will be sent to your registered email address.

2. View Notifications

In SutiExpense, you can view notificationsor download policy documents, if any, uploaded by your administrator.

1. To view notifications: Click on the  icon provided beside your profile picture.
2. A **Notifications** window opens displaying the messages, if any, posted by your administrator.

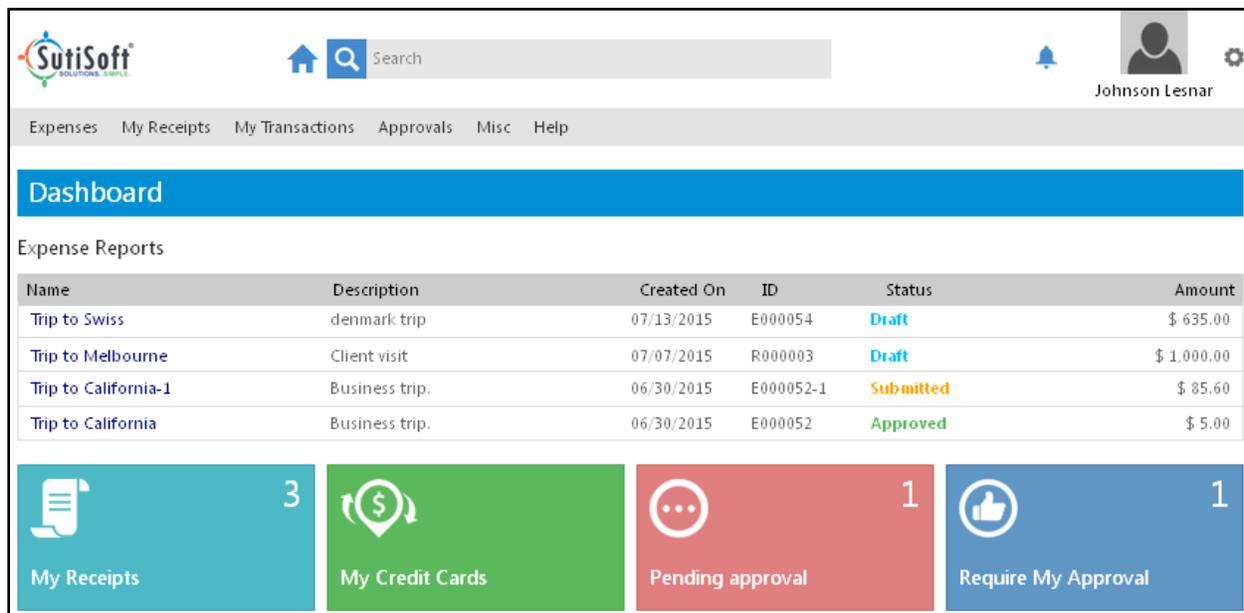
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3. Dashboard

The SutiExpense application home page or dashboard displays the following:

1. Recent 10 records: These may include reports that were created but not yet submitted, submitted, approved, or rejected.
2. **My Receipts**: Displays the list of receipts; you can also upload single/multiple receipts from your computer, and attach them to reports.
3. **My Credit Cards**: Displays the list of transactions done using your credit card; you can import these transactions directly to a report.
4. **Pending Approval**: Displays the submitted, approved, and rejected status reports.
5. **Require My Approval**: Displays the list of reports which you need to verify, provided you are an approver.

 **Tip:** You can always view your dashboard from any of the screens by simply clicking on the company logo provided at the top left corner of the page.



The screenshot shows the SutiExpense dashboard interface. At the top, there is a navigation bar with the SutiSoft logo, a search bar, a notification bell, and a user profile for Johnson Lesnar. Below the navigation bar is a menu with options: Expenses, My Receipts, My Transactions, Approvals, Misc, and Help. The main content area is titled "Dashboard" and features a section for "Expense Reports". This section contains a table with the following data:

Name	Description	Created On	ID	Status	Amount
Trip to Swiss	denmark trip	07/13/2015	E000054	Draft	\$ 635.00
Trip to Melbourne	Client visit	07/07/2015	R000003	Draft	\$ 1,000.00
Trip to California-1	Business trip.	06/30/2015	E000052-1	Submitted	\$ 85.60
Trip to California	Business trip.	06/30/2015	E000052	Approved	\$ 5.00

Below the table are four large, colorful buttons with icons and counts:

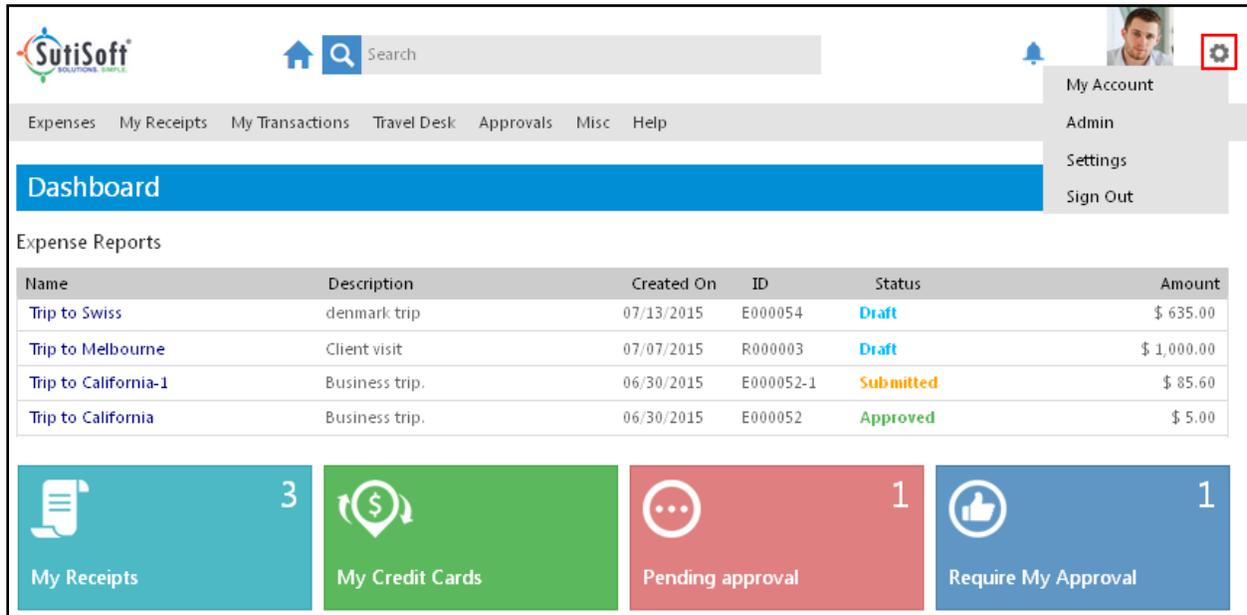
- My Receipts** (3 items)
- My Credit Cards** (1 item)
- Pending approval** (1 item)
- Require My Approval** (1 item)

 **Note:** If you are a new user, your dashboard doesn't contain any records. This screenshot is provided just as an example.

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4. Settings Menu

The settings menu  is provided at the top right corner of the header. Using this menu, you can update your account details and customize settings.



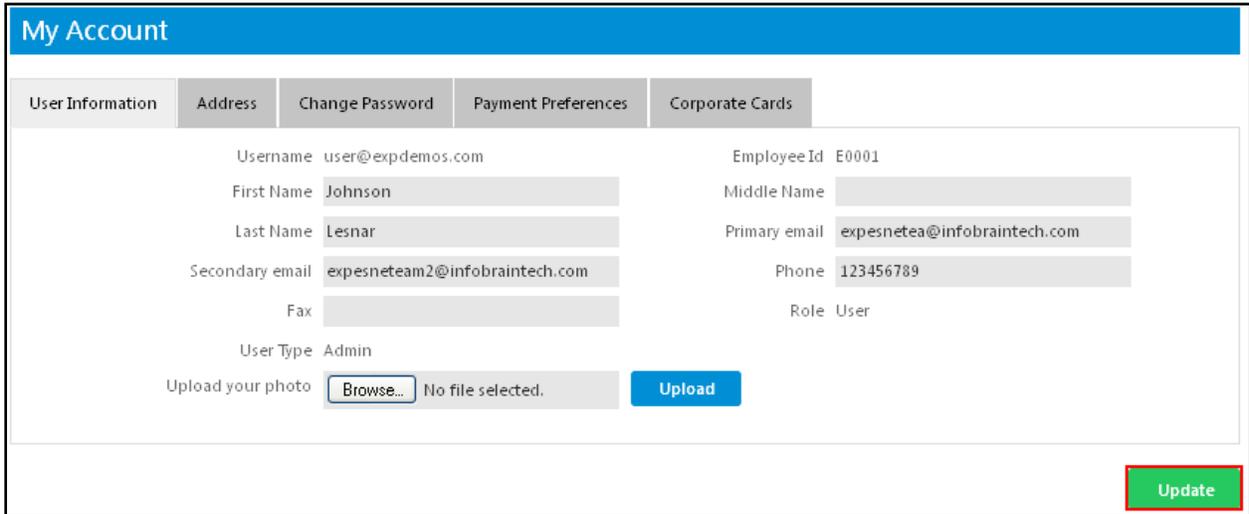
The screenshot shows the SutiSoft dashboard interface. At the top right, a user profile picture is visible next to a settings gear icon, which is highlighted with a red box. A dropdown menu is open, showing options: My Account, Admin, Settings, and Sign Out. The main dashboard area includes a navigation bar with links for Expenses, My Receipts, My Transactions, Travel Desk, Approvals, Misc, and Help. Below this is a 'Dashboard' section with an 'Expense Reports' table. At the bottom, there are four summary cards: My Receipts (3), My Credit Cards, Pending approval (1), and Require My Approval (1).

Name	Description	Created On	ID	Status	Amount
Trip to Swiss	denmark trip	07/13/2015	E000054	Draft	\$ 635.00
Trip to Melbourne	Client visit	07/07/2015	R000003	Draft	\$ 1,000.00
Trip to California-1	Business trip.	06/30/2015	E000052-1	Submitted	\$ 85.60
Trip to California	Business trip.	06/30/2015	E000052	Approved	\$ 5.00

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4.1. Update your Account Details

1. Go to  > **My Account**. **My Account** page appears.



The screenshot shows the 'My Account' page with a blue header. Below the header are five tabs: 'User Information', 'Address', 'Change Password', 'Payment Preferences', and 'Corporate Cards'. The 'User Information' tab is active, displaying the following fields:

Username	user@expdemos.com	Employee Id	E0001
First Name	Johnson	Middle Name	
Last Name	Lesnar	Primary email	expesnetea@infobraintech.com
Secondary email	expesneteam2@infobraintech.com	Phone	123456789
Fax		Role	User
User Type	Admin		

At the bottom of the form, there is a section for 'Upload your photo' with a 'Browse...' button, the text 'No file selected.', and an 'Upload' button. A red-bordered 'Update' button is located at the bottom right of the page.

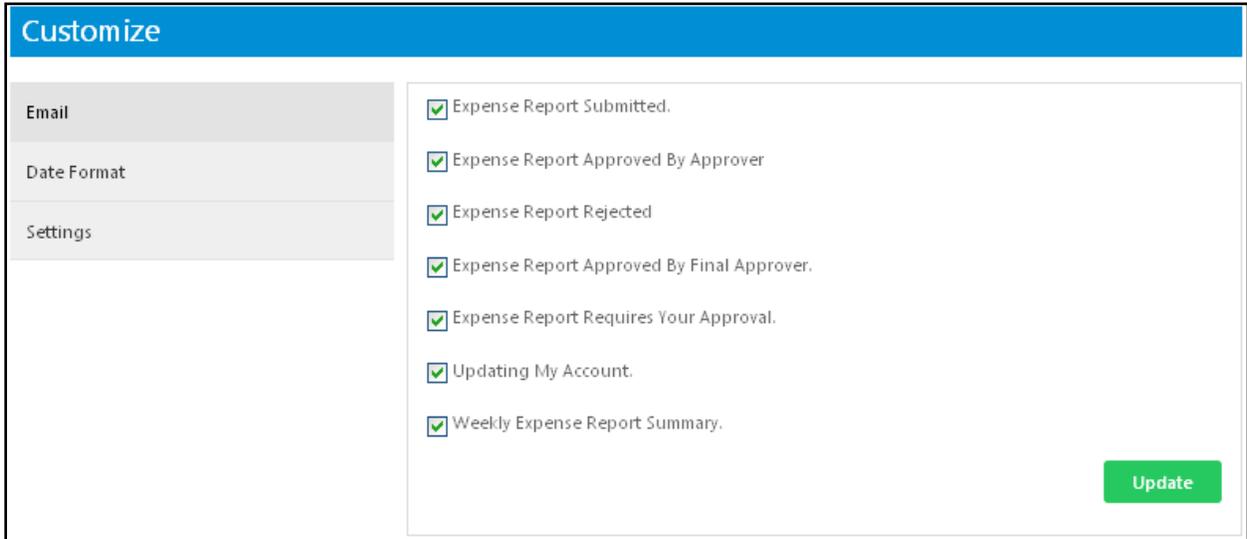
2. This page displays the following tabs:
 - a. **User Information:** Allows you to update your account details and you can also upload your profile picture.
 - b. **Address:** Allows you to update your address.
 - c. **Change Password:** Allows you to change your password.
 - d. **Payment Preferences:** Allows you to select a payment preference for the reimbursement.
 - e. **Corporate Cards:** Allows you to define your corporate card numbers.
3. Update the details and click **Update**.

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4.2. Customize Your Settings

In SutiExpense, you can customize your email settings, date format, and more. To customize settings:

1. Go to  > **Settings**. The **Customize** page appears.



2. This page contains the following tabs:
 - a. **Email:** In this tab, you can customize the settings related to receiving email notifications.
 - b. **Date Format:** In this tab, you can customize the date format.
 - c. **Settings:** In this tab, you can customize the general settings.

5. Create an Expense Report

If you had spent money out of your pocket during your business trip, you will then have to create an expense report and add your expenses for reimbursement.

1. To create an expense report: Go to **Expenses > New Expense Report**. An **Add New Expense Report** window opens.

2. From the Type dropdown list, select **Expense**.
3. Enter the details and click **Save**. The **Expense Report** screen opens where you can add your expenses using the expense line items at the bottom of the page or import corporate card transactions directly to this report.

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5.1. Adding Line Items to Your Expense Report

When you create a new expense report, the Expense Report screen opens using which you can add line items to your report.

1. In the **Expense Report** screen, click on a line item you would like to add to the report.



2. An Add [Item] Expense Details window opens.

Note: *Item refers to the name of the line item.*

Add Meals Expense Details
✕

Expenses

Taxes

Assign Codes

Expense Type

Restaurant

Date

Amount

Attendees

Multiple attendees should be separated by a semicolon (;)

Purpose

Receipt added successfully

1 out of 1

Sheetz #186
1503 N Frederick
Pike
Winchester, VA 22601
(540) 722-5054
2/1/2012 11:29:09 AM
POS Terminal

Order Number: 138, 115

Register: 1
ORDER #115

Del112	\$3.98
+ Provolone	\$0.99
MASTER TRAK	
LAYS CLASSIC Single	\$1.09
CHOC JUNIOR Single	\$1.49
AQUA FINA WATER Single	\$1.59
DT OF PEPSI 250 Single	\$0.00
My Sheetz Card	\$0.00
Sub. Total:	\$10.83
Tax:	\$0.50
Total:	\$11.33
Discount Total:	\$0.00
Visa:	\$11.33
Change	\$0.00

Visa
Card Num : XXXXXXXXXXXXX07064
Store : 0186
Approval : 07325A
Time : 2012/02/01 11:29:09

My Sheetz Card
Card Num : XXXXXXXXXXXXX4153
Terminal : 0186
approval : CA110B
Rewards:
Credits: 10
Yrs: 2
1

Browse from [My Receipts](#)

or

Upload Receipts from your computer

No file selected.

Comments

3. This window contains following tabs:
 - a. **Expenses:** Allows you to enter your expense details and attach appropriate receipts.
 - b. **Taxes:** Allows you to add the tax amount.
 - c. **Assign Codes:** Allows you to assign this line item under a client/project code.

Note:

- ✓ *The 'Taxes' and 'Assign Codes' tabs can be turned on/off by your administrator.*
- ✓ *You can attach receipt(s) from your computer, or receipt(s) sent to receipts@sutisoft.com from your registered email address can be attached by clicking on **My Receipts** link.*

4. Attach a receipt in support to the line item.
5. Click **Save**. The **Expense Report** screen appears displaying the line item details. You can add more line items similarly.

Expense Report

Expense Report Name : **Trip to Illinois**

Description : Business trip

Created On : 07/14/2015

ID : E000055

Amount : \$ 11.33

Merchant	Date	Source	Expense Type	GL Code	Receipts	Amount (\$)
Food World	07/14/2015	Cash	Meals	658...		11.33
Expenses						11.33
Tax						0.00
Grand Total						11.33
Cash Advance						0.00
Credit Amount						0.00
Company Paid						0.00
Amount Owed						11.33

1 out of 3

\$ 5.61

Save as draft
Submit

Add Line Items

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5.2. Expense Report Page Options

The Expense Report page contains the following options:

5.2.1. Alternate Submit

This option is provided to submit an expense report to an alternate approver.

Note: This option can be turned on/off by your administrator.

1. To submit expense report to an alternate approver: Click advanced options icon and then select **Alternate Submit**.

The screenshot shows the 'Expense Report' page for a report titled 'Trip to Illinois'. The report details include: Description: Business trip, Date of Trip: 07/15/2015, ID: E000055, and Amount: \$ 26.33. A table lists two expenses: Food World (Meals, 11.33) and Avis (Car Rental, 15.00). A summary table shows a Grand Total of 26.33 and an Amount Owed of 26.33. An advanced options menu is open, with 'Alternate Submit' highlighted in red.

Merchant	Date	Source	Expense Type	GL Code	Receipts	Amount (\$)
Food World	07/14/2015	Cash	Meals	658...		11.33
Avis	07/09/2015	Cash	Car Rental	650...		15.00
Expenses						26.33
Taxes						0.00
Credits						0.00
Grand Total						26.33
Company Paid						0.00
Company Paid Taxes						0.00
Amount Owed						26.33

2. In the Confirm Submission window, select an alternate approver and then click **Yes**.

The 'Confirm submission' dialog box asks 'Are you sure you want to submit the Expense ?'. The 'Submit To' dropdown menu is open, showing 'User: Johnson Lesnar' selected. 'Yes' and 'No' buttons are at the bottom.

Note: When you confirm submission, the application will verify your expense report and will restrict the submission, if an error has occurred.

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5.2.2. Move Expense Type

This option is provided to move expense line item(s) from an expense report to another expense report.

1. To move expense line item(s): Click advanced options icon and then select **Move Expense Type**.

The screenshot shows the 'Expense Report' interface for a report titled 'Trip to Illinois'. The report details include: Description: Business trip, Date of Trip: 07/15/2015, ID: E000055, and Amount: \$ 26.33. A table lists the following items:

Merchant	Date	Source	Expense Type	GL Code	Receipts	Amount (\$)
Food World	07/14/2015	Cash	Meals	658...		11.33
Avis	07/09/2015	Cash	Car Rental	650...		15.00
Expenses						26.33
Taxes						0.00
Credits						0.00
Grand Total						26.33
Company Paid						0.00
Company Paid Taxes						0.00
Amount Owed						26.33

A dropdown menu is open, showing options: Alternate Submit, Move Expense Type (highlighted), Recategorize, and Sort By. A receipt preview for 'MEALS' is visible on the right side of the screen.

2. In the Move Expense Type(s) window, select line item(s) you want to move.
3. From the Expense Report dropdown list, select an expense report to which you want to move the line item(s) to, and then click **Move**.

The 'Move Expense Type(s)' dialog box shows the following configuration:

- Expense Report: hotel folio
- Expense Type: Car Rental - \$ 15.00, Meals - \$ 11.33 (Meals is selected)

Buttons: Move, Cancel

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5.2.3. Recategorize

This option is provided to recategorize an expense type to another expense type. For example, recategorize 'Meals' expense type to 'Hotel' expense type.

1. To recategorize: Click advanced options icon and then select **Recategorize**.

The screenshot shows the 'Expense Report' interface. At the top, there is a blue header with the title 'Expense Report' and several utility icons. Below the header, the report details are listed: Expense Report Name: Trip to Illinois, Description: Business trip, Date of Trip: 07/15/2015, ID: E000055, and Amount: \$ 26.33. A table lists the expenses:

Merchant	Date	Source	Expense Type	GL Code	Receipts	Amount (\$)
Food World	07/14/2015	Cash	Car Rental	650...		11.33
Avis	07/09/2015	Cash	Car Rental	650...		15.00
Expenses						26.33
Taxes						0.00
Credits						0.00
Grand Total						26.33
Company Paid						0.00
Company Paid Taxes						0.00
Amount Owed						26.33

At the bottom of the report, there are 'Save as draft' and 'Submit' buttons. A dropdown menu is open over the 'Car Rental' expense type, with options: Alternate Submit, Move Expense Type, **Recategorize** (highlighted with a red box), and Sort By. To the right, a receipt preview is visible with a total of \$ 5.61.

2. In Recategorize Expense window, select an expense type to which you want to recategorize to, and click **Update**.

The screenshot shows the 'Recategorize Expense' window. It contains a table with the following data:

Expense Type	Date	Merchant	Amount	Recategorize To
Hotel	07/14/2015	Food World	11.33	Meals
Car Rental	07/09/2015	Avis	15.00	Parking

At the bottom right, there are 'Update' and 'Cancel' buttons.

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5.2.4. Sort By

This option is provided to sort expense line items based on created date, expense date, expense type, amount, and out of policy.

1. To sort expense line items: Click advanced options icon > **Sort By**.

Expense Report

Expense Report Name : Trip to Illinois

Description : Business trip

Date of Trip : 07/15/2015

ID : E000055

Amount : \$ 26.33

Merchant	Date	Source	Expense Type	GL Code	Receipts	Amount (\$)
Food World	07/14/2015	Cash	Hotel	675...		11.33
Avis	07/09/2015	Cash	Car Rental	650...		15.00
Expenses						26.33
Taxes						0.00
Credits						0.00
Grand Total						26.33
Company Paid						0.00
Company Paid Taxes						0.00
Amount Owed						26.33

Save as draft Submit

2. In the appeared submenu, select a sorting option; expense line items will be sorted accordingly.

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5.2.5. Print Options

This option is provided to print your expense report.

1. To print your expense summary, in your Expense Report screen, click .

Expense Report Name : Trip to Illinois

Description : Business trip

Date of Trip : 07/15/2015

ID : E000055

Amount : \$ 26.33

Merchant	Date	Source	Expense Type	GL Code	Receipts	Amount (\$)
Food World	07/14/2015	Cash	Hotel	675...		11.33
Avis	07/09/2015	Cash	Car Rental	650...		15.00
Expenses						26.33
Taxes						0.00
Credits						0.00
Grand Total						26.33
Company Paid						0.00
Company Paid Taxes						0.00
Amount Owed						26.33

Save as draft Submit

2. The Print Options window opens displaying multiple printing options.

Print Options

- Summary with receipts
- Summary with receipts - Detailed / B&W(Gray Scale)
- Summary with receipts Detailed(Grouped) / B&W(Gray Scale)
- Summary without receipts Detailed(Grouped)
- Summary only
- Grouped
- Receipts Only

 **Note:** This screenshot displays all the printing options including PDFs and attachments. Some of these options can be turned off by your administrator.

3. Choose an option and click on it.
4. The print window opens. Select the printer, number of copies and print the report.

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5.2.6. Add Notes to the Report

You can add notes to your expense report.

1. To add notes, in your Expense Report screen, click .

Expense Report








Expense Report Name : Trip to Illinois 

Description : Business trip

Date of Trip : 07/15/2015

ID : E000055

Amount : \$ 26.33

Merchant	Date	Source	Expense Type	GL Code	Receipts	Amount (\$)
Food World	07/14/2015	Cash	Hotel	675...		11.33
Avis	07/09/2015	Cash	Car Rental	650...		15.00
Expenses						26.33
Taxes						0.00
Credits						0.00
Grand Total						26.33
Company Paid						0.00
Company Paid Taxes						0.00
Amount Owed						26.33

Save as draft
Submit

1 out of 3




\$ 5.61

2. The following window opens. Enter notes and click **Add Notes**.

Add a note to the Expense Report


Notes not added

Johnson Lesnar

Sample notes.

Max 250 characters 237/250

Does not accept the following characters (<>')

Add Notes
Cancel

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5.2.7. Import Transactions

You can import your corporate card transactions to an expense report.

1. To import transactions into your expense report, click  .

Expense Report








Expense Report Name : Trip to Illinois 

Description : Business trip

Date of Trip : 07/15/2015

ID : E000055

Amount : \$ 26.33

Merchant	Date	Source	Expense Type	GL Code	Receipts	Amount (\$)
Food World	07/14/2015	Cash	Hotel	675...		11.33
Avis	07/09/2015	Cash	Car Rental	650...		15.00
Expenses						26.33
Taxes						0.00
Credits						0.00
Grand Total						26.33
Company Paid						0.00
Company Paid Taxes						0.00
Amount Owed						26.33

Save as draft
Submit

1 out of 3



\$ 5.61

2. **My Transactions** page appears displaying the transactions done using your corporate card.

My Transactions

Transactions Type AMEX - 102030 From To

Search

Expense Report Name E000055 - Trip to Illinois

<input type="checkbox"/>	Merchant	Date	Receipt	Amount	Currency	Expense Type	Actions
<input type="checkbox"/>	Top Cab	10/20/2014		33.24	US Dollar	Select ▼	
<input checked="" type="checkbox"/>	REEMAN NEW ORLEANS	02/06/2015		7.25	US Dollar	Entertainment ▼	
<input type="checkbox"/>	Ommission	12/05/2015		15.70	US Dollar	Gas ▼	

Import
Back

3. Select transaction(s) and click **Import**. Selected transaction(s) will be added to the Expense Report screen.

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5.2.8. Attach Receipts

You can attach receipts by clicking the icon in your Expense Report screen, which navigates you to 'My Receipts' screen. This screen acts as a receipt library where you can store multiple receipts from your computer. This screen also displays receipts which were attached and sent from your email address registered to 'receipts@sutisoft.com' account.

Note: This option can be turned on/off by your administrator.

1. To attach receipts, in your Expense Report screen, click .

Expense Report Name : Trip to Illinois

Description : Business trip

Date of Trip : 07/15/2015

ID : E000055

Amount : \$ 26.33

Merchant	Date	Source	Expense Type	GL Code	Receipts	Amount (\$)
Food World	07/14/2015	Cash	Hotel	675...		11.33
Avis	07/09/2015	Cash	Car Rental	650...		15.00
Expenses						26.33
Taxes						0.00
Credits						0.00
Grand Total						26.33
Company Paid						0.00
Company Paid Taxes						0.00
Amount Owed						26.33

Save as draft Submit

2. My Receipts page appears. Select a receipt and an expense type to which you want to attach, and then click **Attach**.

From Date To Date Search

Expense Report Name E000055-Trip to Illinois Expense Type Hotel - 07/14/2015 - \$ 11.33 Attach

Select All

<input checked="" type="checkbox"/> 788-Sheetz	
Merchant : --	
Location : --	
Amount : 11.33	
Date : 2012/02/01	
<input type="checkbox"/> 725-Scan0001	
Merchant : Charlotte Aviation	
Location : Charlotte	
Amount : 43.00	
Date : 06/03/2011	

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5.2.9. View Attached Receipts

Using this option, you can view receipts attached to your expense report, download, print, and delete receipt(s).

1. To view attached receipts, in your Expense Report screen, click .

Expense Report Name : Trip to Illinois

Description : Business trip

Date of Trip : 07/15/2015

ID : E000055

Amount : \$ 26.33

Merchant	Date	Source	Expense Type	GL Code	Receipts	Amount (\$)
Food World	07/14/2015	Cash	Hotel	675...		11.33
Avis	07/09/2015	Cash	Car Rental	650...		15.00
Expenses						26.33
Taxes						0.00
Credits						0.00
Grand Total						26.33
Company Paid						0.00
Company Paid Taxes						0.00
Amount Owed						26.33

[Save as draft](#) [Submit](#)

2. An Expense Receipts window opens displaying receipts attached, if any, to the report.

Expense Receipts

Delete Multiple Receipts Download All

3. Using , , and icons, you can print, download, and delete a receipt respectively.

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5.2.10. Receipt Matching

This option is provided to display receipt(s) that match with expense line item details; you can attach them to the line item.

- To view matching receipts, in the Expense Report screen, click .

Expense Report










Expense Report Name : [Trip to Illinois](#) 

Description : Business trip

Date of Trip : 07/15/2015

ID : E000055

Amount : \$ 26.33

Merchant	Date	Source	Expense Type	GL Code	Receipts	Amount (\$)
Food World	07/14/2015	Cash	Hotel	675...		11.33
Avis	07/09/2015	Cash	Car Rental	650...		15.00
Expenses						26.33
Taxes						0.00
Credits						0.00
Grand Total						26.33
Company Paid						0.00
Company Paid Taxes						0.00
Amount Owed						26.33

Save as draft
Submit

1 out of 3




\$ 5.61

- The **Receipt Matching** window opens displaying receipts that match with the line item details.

Receipt Matching (1 Out Of 2 matched)


Hotel : \$11.33

Merchant : Food World

Location : --

Date : 07/14/2015



Attach

Car Rental : \$15.00 No receipt matched

Merchant : Avis

Location : --

Date : 07/08/2015

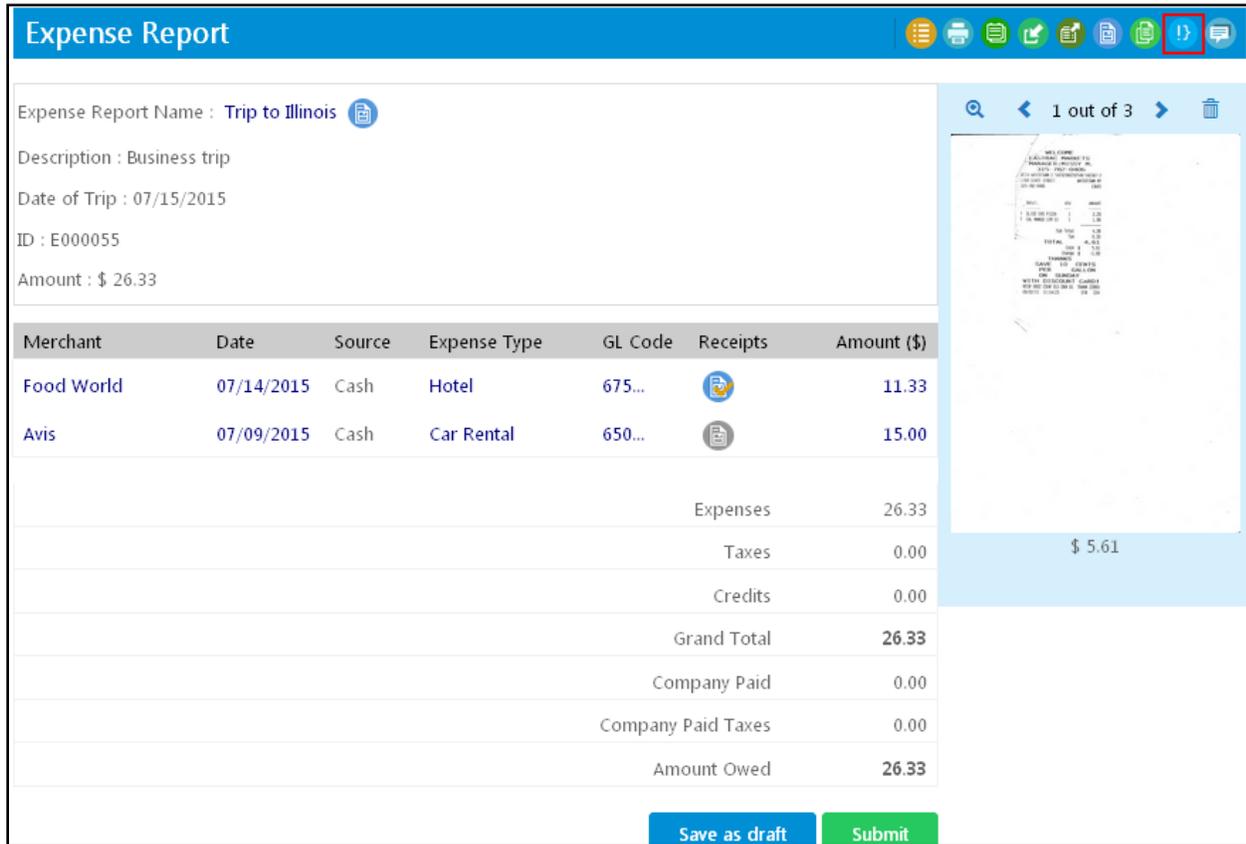
- You can attach a receipt by clicking on **Attach** link.

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5.2.11. View Exceptions

This option is provided to view errors in your expense report.

- To view errors, in your Expense Report screen, click .



Expense Report

Expense Report Name : Trip to Illinois 

Description : Business trip

Date of Trip : 07/15/2015

ID : E000055

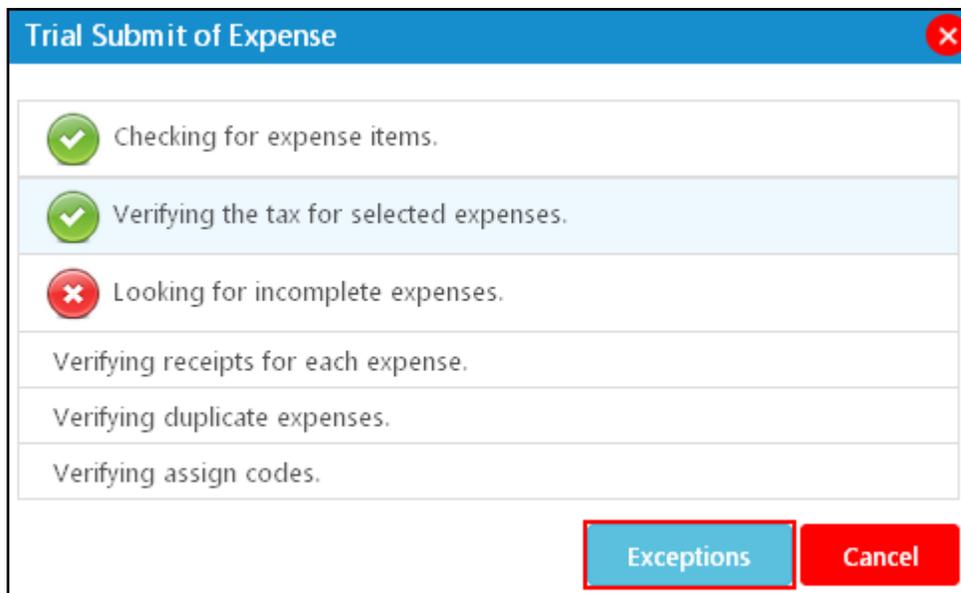
Amount : \$ 26.33

Merchant	Date	Source	Expense Type	GL Code	Receipts	Amount (\$)
Food World	07/14/2015	Cash	Hotel	675...		11.33
Avis	07/09/2015	Cash	Car Rental	650...		15.00
Expenses						26.33
Taxes						0.00
Credits						0.00
Grand Total						26.33
Company Paid						0.00
Company Paid Taxes						0.00
Amount Owed						26.33

\$ 5.61

[Save as draft](#) [Submit](#)

- The following window opens displaying errors, if any, found in the report.



Trial Submit of Expense 

-  Checking for expense items.
-  Verifying the tax for selected expenses.
-  Looking for incomplete expenses.
- Verifying receipts for each expense.
- Verifying duplicate expenses.
- Verifying assign codes.

[Exceptions](#) [Cancel](#)

- Click **Exceptions** to identify the errors occurred.

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5.2.12. UpdateExpense Report Details

You can update your expense report details. To update the details, follow the below instructions:

1. In your Expense Report screen, click on the expense report name hyperlink.

Expense Report

Expense Report Name : Trip to Illinois 

Description : Business trip

Date of Trip : 07/15/2015

ID : E000055

Amount : \$ 26.33

Merchant	Date	Source	Expense Type	GL Code	Receipts
Food World	07/14/2015	Cash	Hotel	675...	
Avis	07/09/2015	Cash	Car Rental	650...	

2. An **Update Expense Report Details** window opens.

Update Expense Report ✕

Expense Report Name
Trip to Illinois

Date of Trip
07/14/2015 

From Date
07/14/2015 

To Date
07/14/2015 

Period
Select ▼

Description
Business trip

Update
Cancel

3. Update the details and click **Update**.

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5.2.13. Submit an Expense Report for Approval

You can submit an expense report for approval whose approval hierarchy is set by your administrator. If your report contains any errors, the application will restrict the submission process.

1. To submit expense report, click **Submit**.

Expense Report

Expense Report Name : Trip to Illinois

Description : Business trip

Date of Trip : 07/15/2015

ID : E000055

Amount : \$ 26.33

Merchant	Date	Source	Expense Type	GL Code	Receipts	Amount (\$)
Food World	07/14/2015	Cash	Hotel	675...		11.33
Avis	07/09/2015	Cash	Car Rental	650...		15.00
Expenses						26.33
Taxes						0.00
Credits						0.00
Grand Total						26.33
Company Paid						0.00
Company Paid Taxes						0.00
Amount Owed						26.33

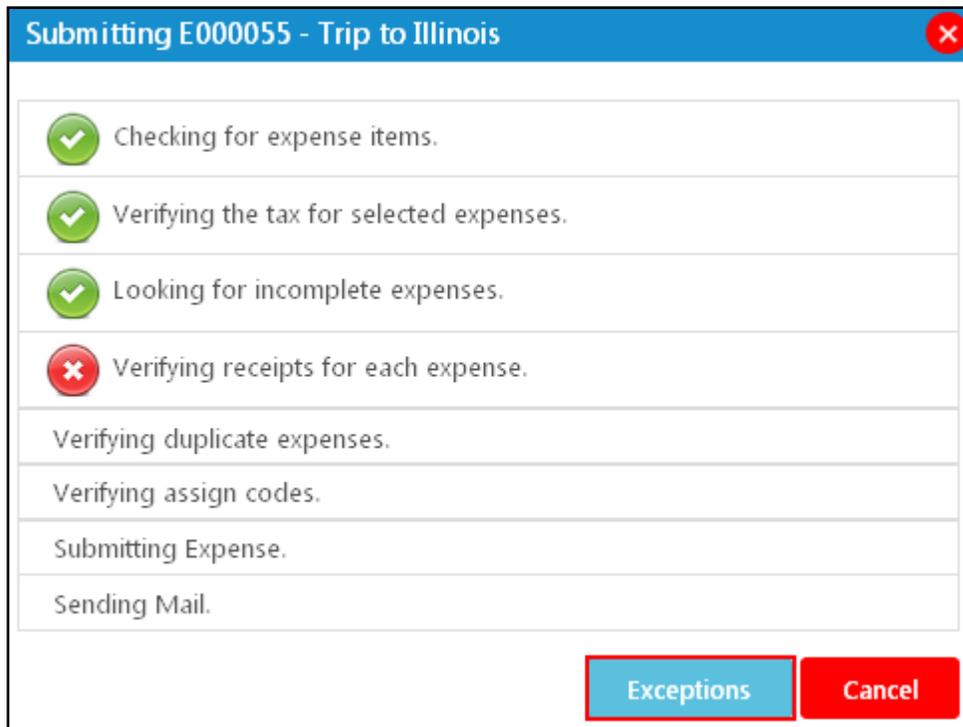
Save as draft
Submit

1 out of 3

\$ 5.61

2. In the confirmation message box, click **Yes**.
3. The application will verify your report.

Note: You will see a success message when the report was submitted successfully. If the application has restricted the submission process due to an error, you will have to edit the appropriate line details and try again. For example, the following screenshot says an error has occurred due to which the submission process was restricted.



4. If you find your report was not submitted, click **Exceptions** to identify the error(s).
5. An **Exceptions** window opens displaying the error(s). For example, the below screenshot says the 'Car Rental' line item needs a receipt to be attached.

Exceptions

● Indicates exception

Expense Name	Out of policy	Receipts	Incomplete	Duplicates	Tax	Assign Codes
Hotel - 11.33	✓	✓	✓	✓	✓	✓
Car Rental - 15.00	✓	●	✓	✓	✓	✓

6. Update the line item details accordingly and then submit again.

Note: The report you have submitted will be listed in the Submitted page. Otherwise, the report remains in draft status and will be listed in the Draft page.

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5.2.14. Add Multiple Receipts

1. Click  (at the top left corner of the page).
2. An **Expense Receipts** window opens which allows you to upload single and multiple receipts.

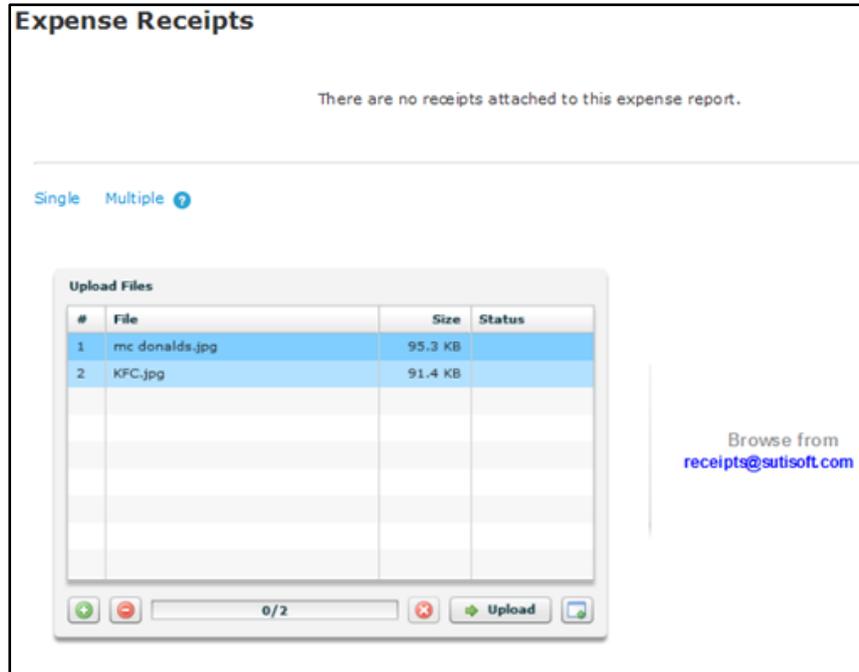


Figure 1: Upload receipts

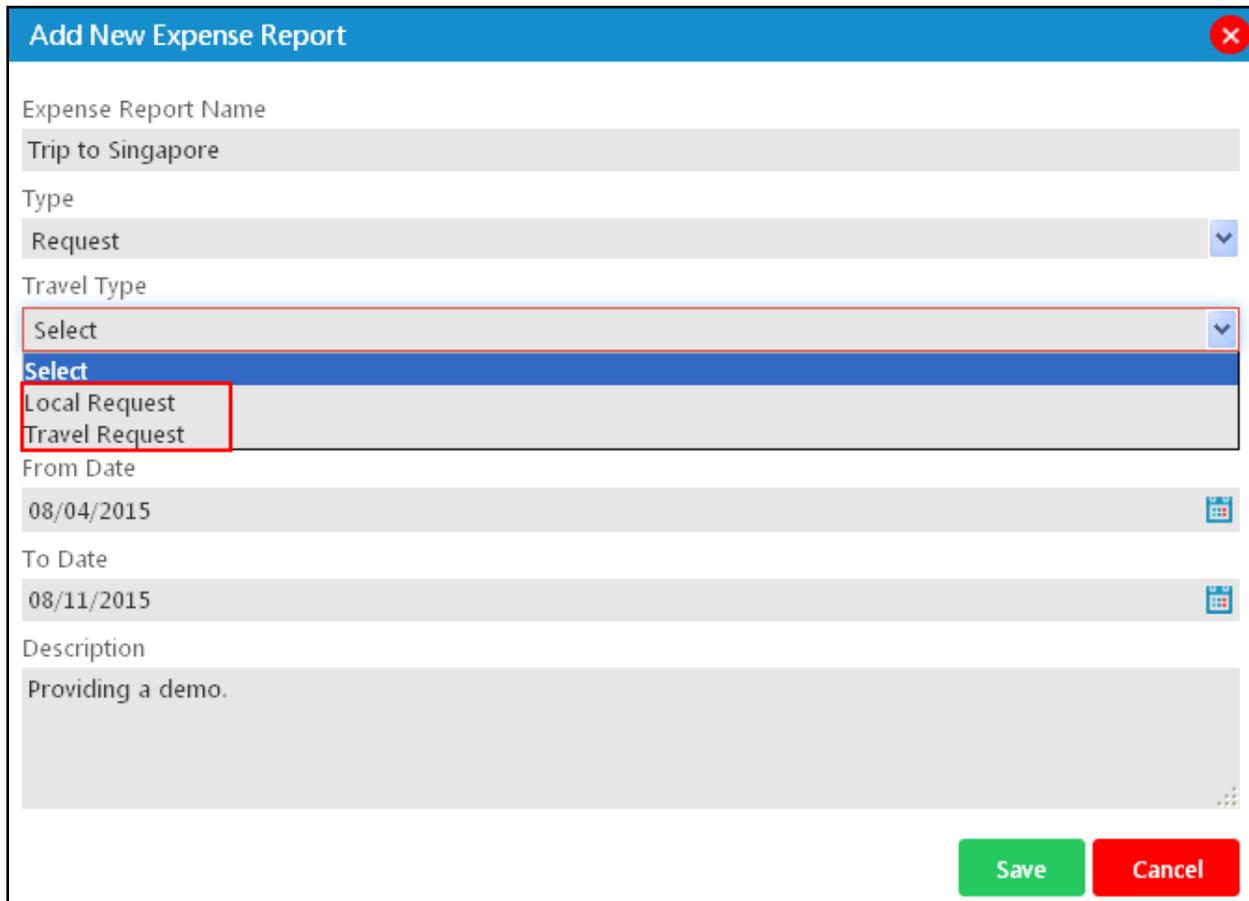
3. To attach multiple receipts:
 - a. Click .
 - b. In the file upload window select the receipts you want to attach and click **Open**.
 - c. Receipts attached, if any, will be displayed in the Upload Files section.
 - d. To remove a receipt, select the receipt you want to remove and then click .
 - e. To cancel uploading the receipts, click .
 - f. To upload the receipts to the expense report, click .

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6. CreateRequest

In SutiExpense, you can create a new request, add line item(s) to it, and send it for approval. You can create a local request and a travel request.

1. To create a new request: Go to **Expense > New Expense Report**. An **Add New Expense Report** window opens.
2. From the 'Type' dropdown list, select **Request**. Another dropdown list 'Travel Type' appears displaying the following two options:
 - a. Local Request
 - b. Travel Request



3. Enter the trip details and click **Save**. The 'Local request Summary' page opens when you create a local request and 'Travel Request Summary' page opens when you create a travel request.

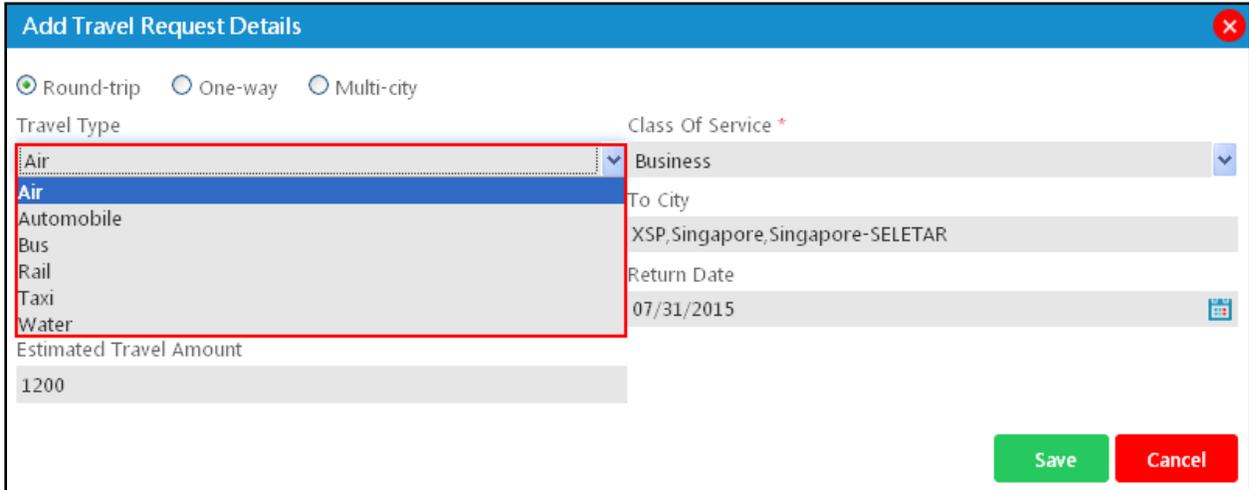
 **Note:** Under travel request, you should add at least one travel segment detail.

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6.1. Add Travel Segment

If you create a local request, the Local Request Summary page appears. You need to click on the  line item to add the travel details. Otherwise, if you create a travel request, the following window opens automatically.

1. In **Add Travel Request Details** window, enter the required trip details.



 **Note:** The screenshot shows various travel types. These are customizable by your administrator.

2. Click **Save**.

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6.2. Add Line Items

The 'Travel Request Summary' page or the 'Local Request Summary' page contains expense line items which are customizable by your administrator.

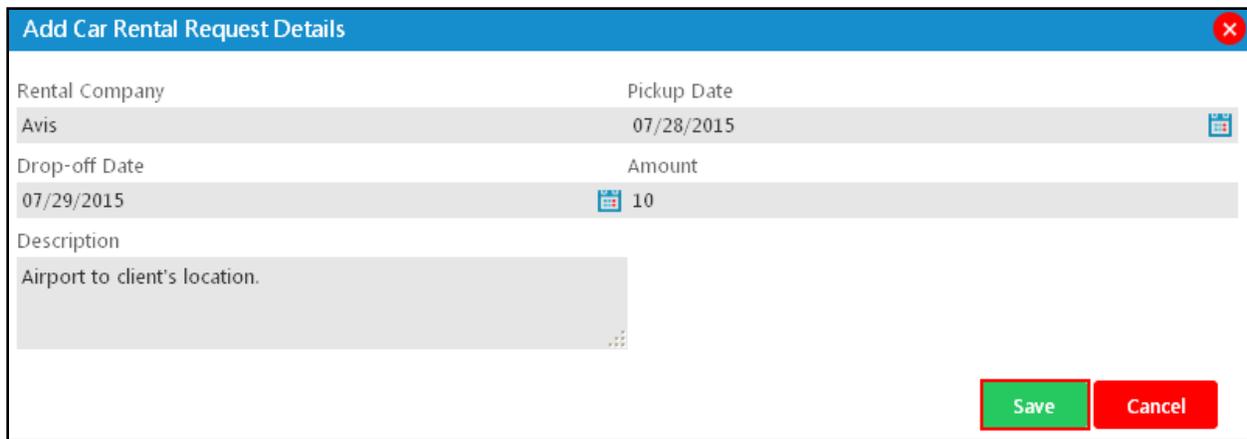
1. Choose a line item you want to add and click on it.



 **Note:** Line items shown in the screenshot are just an example. These can be customized by your administrator.

2. An Add [Item] Request Details window opens.

 **Note:** Item refers to the line item name.



The screenshot shows a window titled "Add Car Rental Request Details" with a close button (X) in the top right corner. The window contains the following fields:

Rental Company	Pickup Date
Avis	07/28/2015 
Drop-off Date	Amount
07/29/2015 	10
Description	
Airport to client's location.	

At the bottom right of the window are two buttons: a green "Save" button and a red "Cancel" button.

3. Enter the required details and click **Save**. The line item will be added to the report.

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6.3. Submit a request

In SutiExpense, you can submit a request for approval. To submit your request, follow the below instructions:

1. In your request summary page, click **Submit**.

Local Request Summary 📄 📄

Request Name : Trip to New York

Expense Type : Local Request

Description : new york trip

Date of Trip : 07/17/2015

ID : R000006

Amount : \$10.00

Merchant	Request Date	Expense Type	City	Description	Amount (\$)
N/A	07/28/2015	Car Rental			10.00
				Cash Advance	0.00
				Expenses Amount	10.00

Add Line Items









Save as draft
Submit

2. In the confirmation message box, click **Yes**. The application will verify your report.

 **Note:** You will see a success message when the report was submitted successfully. If the application has restricted the submission process due to an error, you will have to edit the appropriate line details and try again. If you didn't submit the report, it will be listed in the draftpage.

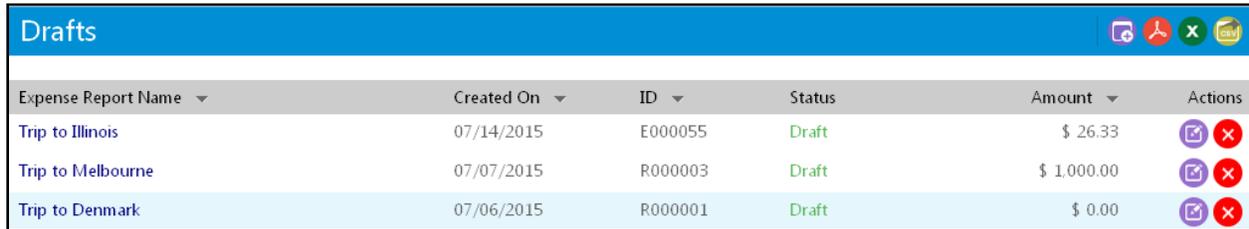
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7. Draft

This feature is provided to view the requests/expense reports that have been created, but not yet submitted for approval.

7.1. To View Draft Reports

1. Go to **Expenses > Drafts**. The **Drafts** page appears.



Expense Report Name	Created On	ID	Status	Amount	Actions
Trip to Illinois	07/14/2015	E000055	Draft	\$ 26.33	 
Trip to Melbourne	07/07/2015	R000003	Draft	\$ 1,000.00	 
Trip to Denmark	07/06/2015	R000001	Draft	\$ 0.00	 

2. Using  and  icons beside each report, you can view/edit details and delete it respectively.
3. Using an  icon on the actions bar, you can create a new request or an expense report.
4. Using , , and  icons on the actions bar, you can export the details in .pdf, .xls, and .csv formats respectively.

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8. Submitted

This feature is provided to view the status of the reports that are sent for approval. You can also convert an approved request to an expense report.

You can customize a setting in your account based on which rejected reports will be listed in this page, or to direct them to the Drafts page.

To customize this setting: Go to > **Setting** (submenu) > **Settings** (tab) > Select an option in the 'Rejected Requests/Expense Reports Move To' dropdown list and then click **Update**.

Customize

Email	Num of Records Per Page	<input type="text" value="20"/>	<input type="button" value="Update"/>
Date Format	Language	<input type="text" value="English"/>	<input type="button" value="Update"/>
Settings	Timezone	<input type="text" value="(GMT-08:00) Pacific Time (US & ..."/>	<input type="button" value="Update"/>
	Rejected Request/Expense Reports Move To	<input type="text" value="Submitted"/>	<input type="button" value="Update"/>
	Password Authentication	<input type="button" value="No"/>	<input type="button" value="Update"/>

8.1. To View Submitted Reports

1. Go to **Expenses > Submitted**. The **Submitted** page appears.

Submitted Filter By

Expense Report Name <input type="button" value="v"/>	Created On <input type="button" value="v"/>	ID <input type="button" value="v"/>	Status <input type="button" value="v"/>	Amount <input type="button" value="v"/>
Trip to California-1	06/30/2015	E000052-1	Rejected	\$ 85.60
Trip to New York	07/17/2015	R000006	Approved	\$ 10.00
Trip to Singapore	07/17/2015	R000005	Travel Desk	\$ 1,210.00
hotel folio	07/07/2015	E000053	Approved	\$ 50.00
Trip to Swiss	07/13/2015	E000054	Submitted <input type="button" value="i"/>	\$ 635.00
Trip to California	06/30/2015	E000052	Approved	\$ 5.00

2. A **Filter By** dropdown list is provided at the top right corner of the page to search for reports based on the status.
3. To open a report, click on the report name.

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8.2. To Recall Submitted Report Back to Drafts

After you submit a report for approval you can still recall it back to drafts, provided your approver has not verified it yet. The purpose to recall a report is that, the report will be moved to Drafts page where you can edit the details and submit again.

1. To recall a report: Go to **Expenses > Submitted**. The **Submitted** page appears.

Submitted					Filter By ▼
Expense Report Name ▼	Created On ▼	ID ▼	Status ▼	Amount ▼	
Trip to Chicago	07/13/2015	E000054	Submitted i	\$ 635.00	
Trip to New York	07/17/2015	R000006	Approved	\$ 10.00	
Trip to Singapore	07/17/2015	R000005	Travel Desk	\$ 1,210.00	
hotel folio	07/07/2015	E000053	Approved	\$ 50.00	
Trip to California	06/30/2015	E000052	Approved	\$ 5.00	
Trip to California-1	06/30/2015	E000052-1	Rejected	\$ 85.60	

2. Choose a submitted expense report you want to recall and click on the respective report name. The report opens.

Expense Report						
Expense Report Name : Trip to Chicago						
Description : denmark trip						
Date of Trip : 07/13/2015 Submitted on 07/20/2015						
ID : E000054						
Employee Name : Johnson Lesnar						
Amount : \$635.00						
Merchant	Date	Source	Expense Type	GL Code	Receipts	Amount (\$)
california	07/13/2015	Cash	Entertainment	650...		30.00
Avis	07/13/2015	Cash	Car Rental	650...		55.00
N/A	07/13/2015	Cash	Car Rental	650...		550.00
					Expenses	635.00
					Taxes	0.00
					Credits	0.00
					Grand Total	635.00
					Company Paid	0.00
					Company Paid Taxes	0.00
					Amount Owed	635.00
					Back	Recall

3. Click **Recall**. In the confirmation message box, click **Yes** to confirm.

Note: This report will be listed in the Drafts page.

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8.3. Move Rejected Expense/Request to Drafts

This option is provided to move a rejected report to drafts where you can edit the details and submit again.

You can customize a setting in your account based on which rejected reports will be listed in this page, or to direct them to the Drafts page.

To customize this setting: Go to > **Setting** (submenu) > **Settings** (tab). The 'Rejected Requests/Expense Reports Move To' dropdown list displays the following 2 options:

- i. **Submitted**: By selecting this option, rejected reports will be listed in the Submitted page. You need to open a rejected report and then move it to draft.
- ii. **Drafts**: By selecting this option, rejected reports will directly be listed down in the Drafts page.

Select an option and then click **Update**.

If you have selected the **Submitted** option, follow the below instructions to move rejected reports to draft:

1. To move a rejected report to draft: Go to **Expenses > Submitted**. The **Submitted** page appears.

Expense Report Name	Created On	ID	Status	Amount
Trip to Chicago	07/13/2015	E000054	Submitted	\$ 635.00
Trip to New York	07/17/2015	R000006	Approved	\$ 10.00
Trip to Singapore	07/17/2015	R000005	Travel Desk	\$ 1,210.00
hotel folio	07/07/2015	E000053	Approved	\$ 50.00
Trip to California	06/30/2015	E000052	Approved	\$ 5.00
Trip to California-1	06/30/2015	E000052-1	Rejected	\$ 85.60

2. Choose a rejected report you want to move to draft and click on the corresponding report name. The report opens.

Expense Report

Expense Report Name : Trip to California-1
 Description : Business trip.
 Date of Trip : 06/30/2015 Submitted on 07/20/2015 Rejected On 07/20/2015
 ID : E000052-1
 Employee Name : [Johnson Lesnar](#)
 Amount : \$85.60

Merchant	Date	Source	Expense Type	GL Code	Receipts	Amount (\$)
Hyatt	07/08/2015	Cash	Hotel	675...		85.60
Expenses						80.00
Taxes						5.60
Credits						0.00
Grand Total						85.60
Company Paid						0.00
Company Paid Taxes						0.00
Amount Owed						85.60

Move to draft
Back

3. Click **Move to draft**.
4. A confirmation message box opens. Click **Yes** to confirm.

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8.4. Convert an Approved Request to an Expense Report

This option is provided to convert an approved request to an expense report. Once the request is converted to an expense report, you can update the report details, attach receipts, and send it for approval.

1. Go to **Expenses > Submitted**. The **Submitted** page appears.

Submitted					Filter By ▼
Expense Report Name ▼	Created On ▼	ID ▼	Status ▼	Amount ▼	
Trip to Chicago	07/13/2015	E000054	Submitted i	\$ 635.00	
Trip to New York	07/17/2015	R000006	Approved	\$ 10.00	
Trip to Singapore	07/17/2015	R000005	Travel Desk	\$ 1,210.00	
hotel folio	07/07/2015	E000053	Approved	\$ 50.00	
Trip to California	06/30/2015	E000052	Approved	\$ 5.00	
Trip to California-1	06/30/2015	E000052-1	Rejected	\$ 85.60	

2. Choose an approved report you want to convert to an expense report and click on the corresponding report name. The report opens.

Summary					
Request Name : Trip to New York					
Expense Type : Local Request					
Description : new york trip					
Date of Trip 07/16/2015 Submitted on 07/20/2015 - Approved On 07/20/2015					
ID : R000006					
Amount : \$10.00					
Employee Name : Johnson Lesnar					
Merchant	Request Date	Expense Type	City	Description	Amount (\$)
N/A	07/27/2015	Car Rental			10.00
--	07/23/2015	Cash Advance	Melbourne	Required for bu...	500.00
				Cash Advance	500.00
				Expenses Amount	10.00
					<input type="button" value="Back"/> <input type="button" value="Convert to Expense"/>

3. Click **Convert to Expense**.
4. A confirmation message box opens. Click **Yes** to confirm.

Note: This report will be listed in the Drafts page.

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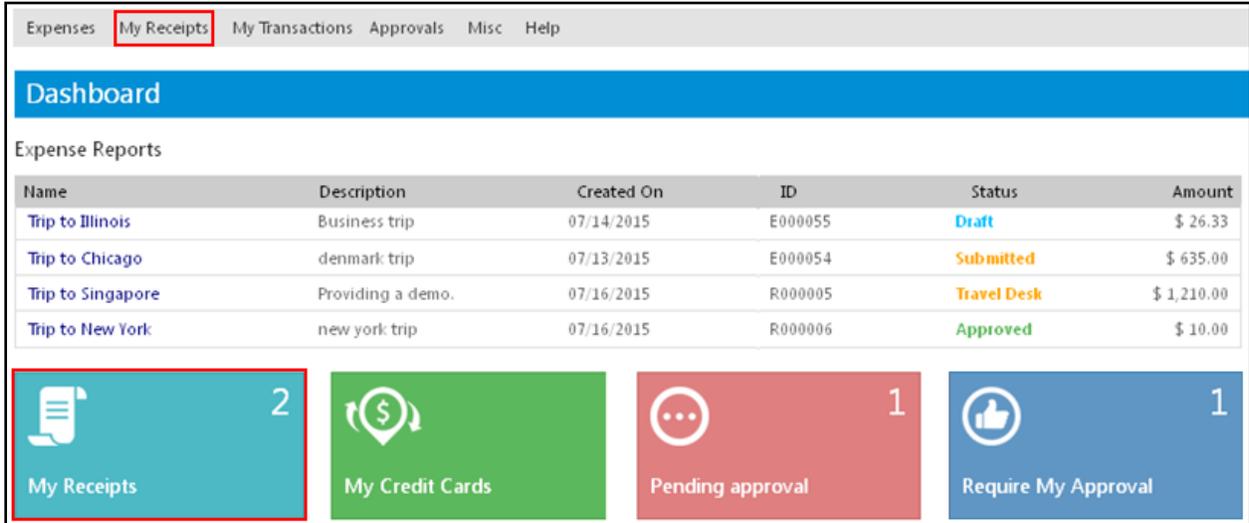
9. My Receipts

This feature is provided to add receipts from your computer into your account, add OCR data to a receipt, attach receipt(s) to an expense report, and delete a receipt.

 **Note:** This feature can be turned on/off by your administrator.

9.1. To View Receipts

1. Do either of the following:
 - a. Click My Receipts menu.
 - b. Click My Receipts box at the bottom of the home page.



The screenshot shows the SutiExpense dashboard with the 'My Receipts' menu item highlighted in red. Below the navigation bar is a 'Dashboard' section with an 'Expense Reports' table. At the bottom, there are four action buttons: 'My Receipts' (highlighted in red), 'My Credit Cards', 'Pending approval', and 'Require My Approval'.

Name	Description	Created On	ID	Status	Amount
Trip to Illinois	Business trip	07/14/2015	E000055	Draft	\$ 26.33
Trip to Chicago	denmark trip	07/13/2015	E000054	Submitted	\$ 635.00
Trip to Singapore	Providing a demo.	07/16/2015	R000005	Travel Desk	\$ 1,210.00
Trip to New York	new york trip	07/16/2015	R000006	Approved	\$ 10.00

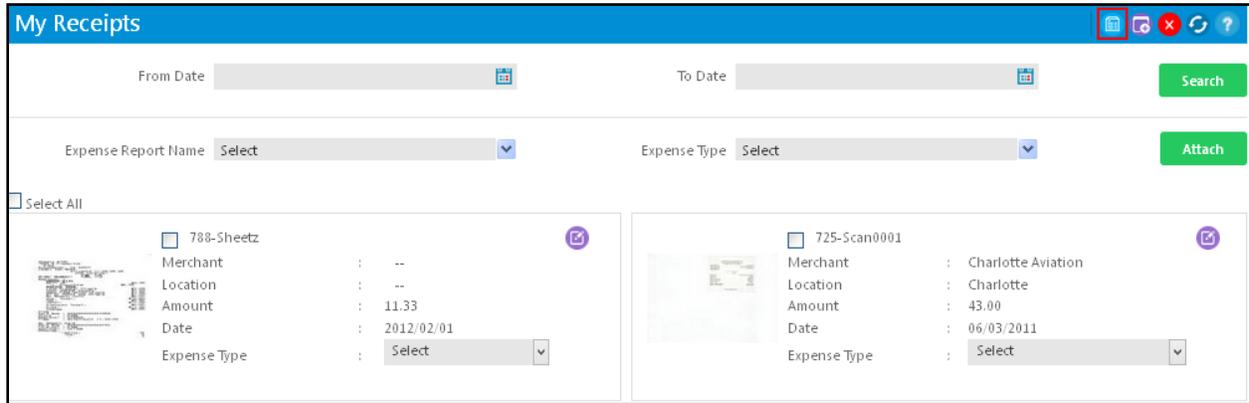
2. **My Receipts** page appears displaying receipts, if any.

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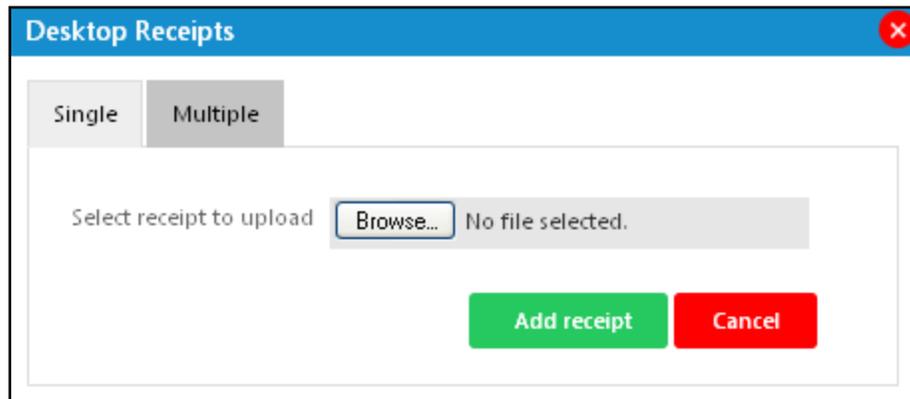
9.2. Upload Receipts From Your Computer

You can upload single or multiple receipts from your computer. To upload receipts, do the following:

1. In **My Receipts** page, on the actions bar, click .



2. The following window opens.



3. This window contains 'Single' and 'Multiple' tabs using which you can upload single or multiple receipts respectively.
4. Upload receipts and click **Add receipt**.

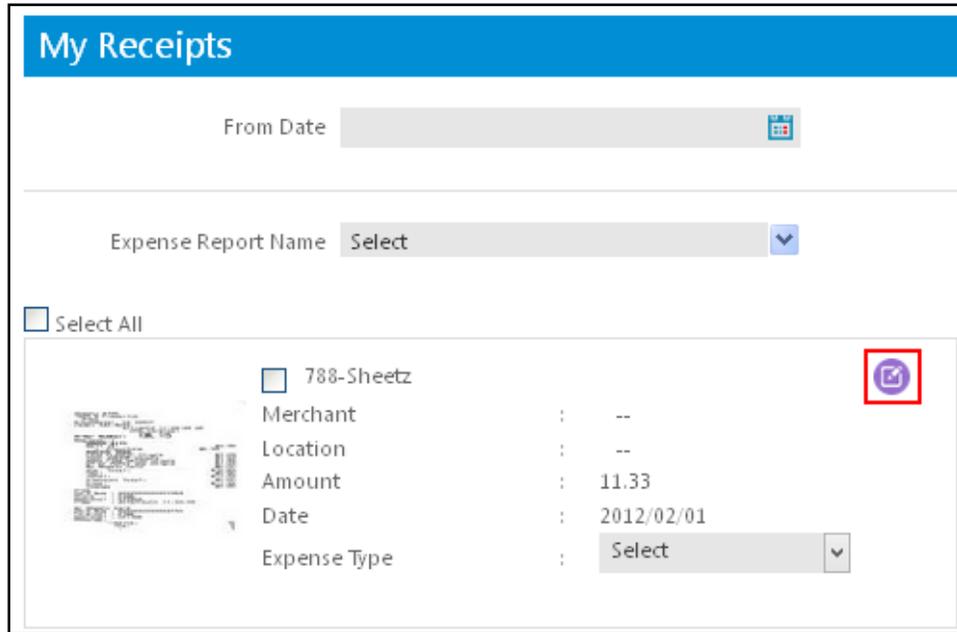
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9.3. Add OCR Data to a Receipt

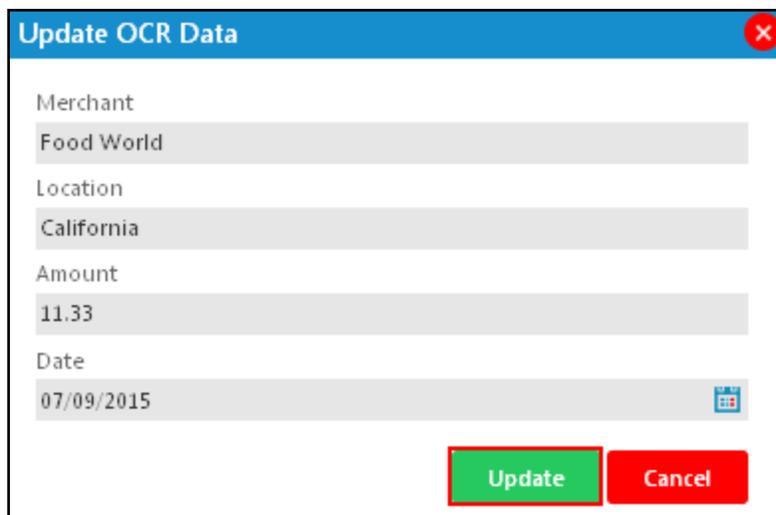
If you had uploaded a receipt, the application automatically reads the data from the receipt. This is known as OCR technology. If the receipt is not properly readable, you can add the OCR data to it.

If you add a line item in an expense report whose data matches with OCR data of a receipt, it will automatically be added to the report. To add OCR data, do the following:

1. In **My Receipts** page, choose a receipt to which you want to add OCR data and click on the  icon.



2. The following window opens.



3. Enter the OCR data and click **Update**.

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9.4. Add receipt to an Expense Report

You can add receipt to an expense report directly from My Receipts page. To add, do the following:

1. In **My Receipts** page, select an expense report and an expense type.

The screenshot shows the 'My Receipts' interface. At the top, there are 'From Date' and 'To Date' filters, a 'Search' button, and a red 'X' icon. Below these are two dropdown menus: 'Expense Report Name' (set to 'E000055-Trip to Illinois') and 'Expense Type' (set to 'Hotel - 07/14/2015 - \$ 11.33'). An 'Attach' button is highlighted with a red box. The main area shows two receipt cards. The first card, '788-Sheetz', is selected with a checkmark and has a purple 'Attach' icon. The second card, '725-Scan0001', is not selected and has a greyed-out 'Attach' icon.

2. Select a receipt you want to attach to the selected expense report and then click **Attach**.
3. In the confirmation window, enter any comments for the receipt and click **Yes** to attach.

9.5. Delete Receipt(s)

1. In **My Receipts** page, select receipt(s) you want to delete.
2. On the actions bar, click .

This screenshot is identical to the one above, but with a red box highlighting the red 'X' icon in the top right corner of the 'My Receipts' header.

3. In the confirmation message box, click **Yes**.

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10. My Transactions

This feature is provided to view transactions charged on your corporate card and add them to an expense report.

10.1. Add Transactions to an Expense Report

1. To add transactions, do either of the following:
 - a. Click **My Transactions** menu.
 - b. Click **My Credit Cards** box at the bottom of the home page.

The screenshot shows the SutiExpense dashboard with the 'My Transactions' menu item highlighted in red. Below the dashboard, there are four action buttons: 'My Receipts' (2), 'My Credit Cards' (1, highlighted in red), 'Pending approval' (1), and 'Require My Approval' (1).

Name	Description	Created On	ID	Status	Amount
Trip to Illinois	Business trip	07/14/2015	E000055	Draft	\$ 26.33
Trip to Chicago	denmark trip	07/13/2015	E000054	Submitted	\$ 635.00
Trip to Singapore	Providing a demo.	07/16/2015	R000005	Travel Desk	\$ 1,210.00
Trip to New York	new york trip	07/16/2015	R000006	Approved	\$ 10.00

2. **My Transactions** page appears.

The screenshot shows the 'My Transactions' page with a search filter for 'AMEX - 102030'. Below the search bar, there is a table of transactions and an 'Import' button highlighted in red.

Merchant	Date	Receipt	Amount	Currency	Expense Type	Actions
<input checked="" type="checkbox"/> Top Cab	10/20/2014		33.24	US Dollar	Car Rental	
<input checked="" type="checkbox"/> REEMAN NEW ORLEANS	02/06/2015		7.25	US Dollar	Entertainment	
<input type="checkbox"/> Omission	12/05/2015		15.70	US Dollar	Select	

3. Select an expense report to which you want to add transactions.
4. Select transaction(s) and then click **Import**.
5. The Expense Report page opens with transactions being added.

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11. Approvals

This feature is provided to verify reports that are sent for approval.

Note: This menu is visible only to approver(s).

11.1. To Approve/Reject a Report

1. Do either of the following:
 - a. Click on the **Approvals** menu.
 - b. Click on **Require My Approval** box at the bottom right corner of the home page.

The screenshot shows the SutiExpense dashboard with the 'Approvals' menu item highlighted in red. Below the navigation bar is a table of expense reports. At the bottom, there are four action buttons: 'My Receipts' (2), 'My Credit Cards', 'Pending approval' (1), and 'Require My Approval' (1). The 'Require My Approval' button is highlighted with a red border.

Name	Description	Created On	ID	Status	Amount
Trip to Illinois	Business trip	07/14/2015	E000055	Draft	\$ 26.33
Trip to Chicago	denmark trip	07/13/2015	E000054	Submitted	\$ 635.00
Trip to Singapore	Providing a demo.	07/16/2015	R000005	Travel Desk	\$ 1,210.00
Trip to New York	new york trip	07/16/2015	R000006	Approved	\$ 10.00

2. The **Require My Approval** page appears displaying the list of pending reports, if any.

The screenshot shows the 'Require My Approval' page with a table of pending reports. The 'Trip to Chicago' row is highlighted with a red border.

Expense Report Name	Submitter	Submitted on	ID	Amount
Trip to Chicago	Johnson Lesnar	07/20/2015	E000054	\$ 635.00

3. Choose a report you want to approve/reject and click on it. The report opens.

Expense Report

Expense Report Name : Trip to Chicago

Description : denmark trip

Submitted on 07/20/2015

ID : E000054

Employee Name : [Johnson Lesnar](#)

Amount : \$635.00

Merchant	Date	Source	Expense Type	GL Code	Receipts	Amount (\$)
california	07/13/2015	Cash	Entertainment	650...	 <input checked="" type="checkbox"/>	30.00
Avis	07/13/2015	Cash	Car Rental	650...	 <input checked="" type="checkbox"/>	55.00
N/A	07/13/2015	Cash	Car Rental	650...	 <input checked="" type="checkbox"/>	550.00
Expenses						635.00
Taxes						0.00
Credits						0.00
Grand Total						635.00
Company Paid						0.00
Company Paid Taxes						0.00
Amount Owed						635.00

Approve
Reject
Back

4. Verify the line item details.
5. To reject some of the line item(s):
 - a. Click on icon provided beside the line item.
 - b. The icon will be highlighted, indicating it will be rejected.

 **Note:** This feature can be turned off by your administrator.

6. Use the **Approve** and **Reject** buttons to approve or reject the report respectively.

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12. About SutiSoft

Our passion is to put your needs above everything else. We build applications that have more features. Our applications easily connect with your other business solutions. We customize the applications to suit your specific needs.

As a result, you spend more time running your business and less time managing software.

Intuitive interface

Our applications deliver some of the richest feature sets in the industry through simple and easy-to-use interfaces. They are built on an open platform architecture that allows easy integration with third-party applications. Deploying our solutions reduces your costs and drives efficiencies, leaving you and your end users delighted.

Scalable SaaS model

The applications are designed to suit the needs of companies of all sizes - from small businesses to large global enterprises. We also boast of having one of the fastest development cycles in the industry, which allows us to incorporate user feedback into our solutions in a matter of weeks.

Flexible pricing

The basic version of an application is usually free, while other versions are competitively priced. We employ a flexible pricing model, which means that you are free to pick the plan of your choice and pay only for the features you actually use.

Launched in 2009, SutiSoft is one of the fastest growing SaaS providers in the industry with a 97% renewal rate.

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