

EXPENSES & CORPORATE CREDIT CARDS

Expense management for Business Central, from phone camera to Purchase Invoice

Employees capture receipts on their phone, cardholders complete their corporate card statements, and approved claims are created in Business Central automatically.

What it does

Employees create expense claims and attach receipt photos straight from their phone. Corporate card statements are sent to each cardholder to add details and receipts, with personal spend on the card flagged and managed. Claims are routed by your rules, approved in Microsoft Teams or by email, and created in Business Central as Purchase Invoices once fully approved.

How it works

- 1 **Capture.** Employees photograph receipts on their phone, or complete their card statement lines.
- 2 **Rules route it.** Rules on cost centre, department groupings or budget data decide who reviews the claim.
- 3 **Approved in Teams.** Approvers sign off in Microsoft Teams or by email, without a Business Central licence.
- 4 **Purchase Invoice created.** Fully approved claims are created in Business Central as Purchase Invoices.

Key features

- ✓ **Phone receipt capture.** Attach receipt photos when creating an expense, wherever you are.
- ✓ **Corporate credit cards.** Statements split by cardholder, completed and routed for approval.
- ✓ **Personal spend.** Personal transactions on the card are flagged and managed.
- ✓ **Multi-currency.** Claims in other currencies across companies and environments.



Lands in Business Central as

Purchase Invoices from fully approved claims

Built for

- ✓ Field, sales and travelling employees
- ✓ Finance teams processing claims at volume
- ✓ Cardholders reconciling corporate card spend

The Cliqo Workflow Engine

Shared by every module. Set your rules up once and use them everywhere.

- Easy to use
- Rules on line details
- Drag-and-drop ordering
- Test mode
- Full app in Teams
- No BC licence for approvers
- Entra ID users
- Multi-company

COMING SOON Automatically creating an expense from a photographed receipt.

See Cliqo with your own scenarios

Book a 30-minute demo, or start with one free sandbox environment.

cliqo.co.uk/book-a-demo