Tallie Customer Launch Kit

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Thank you for your business!

Now that you have completed implementation, you are ready to launch Tallie for the rest of your company.

This Launch Kit is to help provide a successful rollout based on our past customers' experiences and best practices from the Tallie Customer Success Team.

Customer Success includes your Implementation Specialists, Support Experts, Trainers, and Customer Success Managers. We have seen it all!

Please use this kit any way you need. We have templates to use, links and directions for other materials, recommended best practices, and general tips.

Welcome aboard!

Tallie Customer Success

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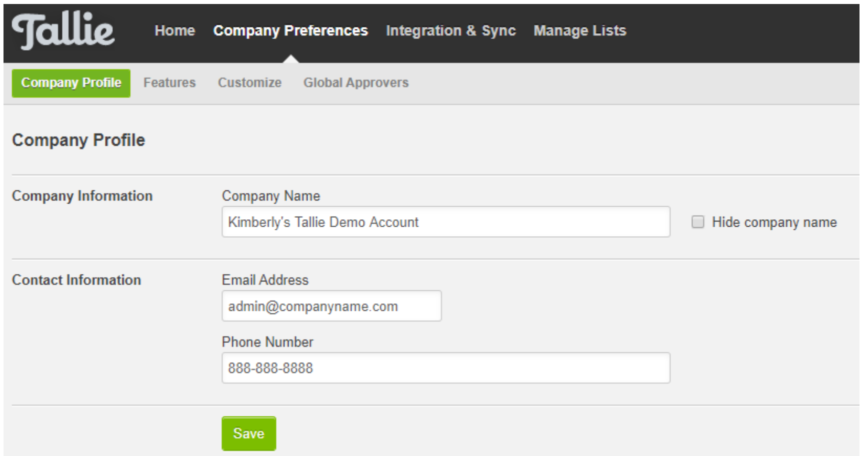
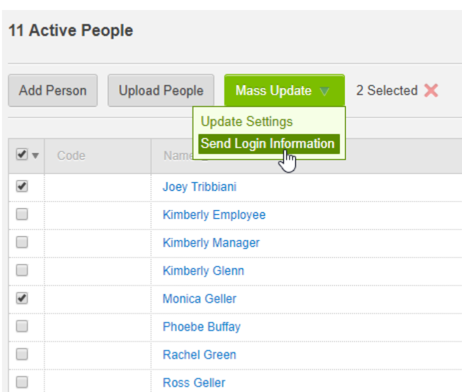
Pre-Launch Reminders

Enter internal System Administrator contact information



Send early communication prior to release date

Send invites to users



Define and communicate internal T&E policies

!! Dinner Limit: $40.00!! Receipts required for all expenses!! Expense reports due every Monday!!

Internal Policies to Define, Pre-Launch

Depending on the question, Tallie Support and Training will refer users to ask their question internally at your company. Tallie is the vessel, but you make the rules as far as policies and processes go.

These are common questions that we answer with, "It would be best to confirm with your internal Tallie administrator."

When Users Can Login

Can you send me my login credentials?

Mileage

How do I enter personal mileage?

Can I save my mileage until the end of the week/month?

Tips

How do I enter the tip amount from a restaurant?

Credit Cards

How does my company card get paid?

Reimbursement Policy

What do I do if I expense over what my company allows?

Do I enter the full amount or only what I'm supposed to be reimbursed?

Personal Expenses

Will I be able to delete personal charges from my account?

Best Practices for Company Rollouts

Communicate.

No one likes change - we know. On top of change, no one wants to be surprised by it. Relay the message that a new (great!) system is coming – early and often. The more that you communicate, the less resistance you'll experience.

Be Positive.

Implementing a new system for a whole company can be frustrating and a LOT of work on you. Positivity and negativity run from the top down. Keep the message clear that the new process will make things easier and will be a positive change.

Be Clear.

Define your travel and expense policies and make them known and clear. While learning a new process, users will at least be familiar with the rules.

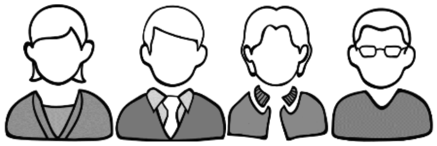
Require Training.

Set a date (or a few) in which all users should have viewed training materials.

Pilot.

A pilot group is beneficial in all areas. Not only do they give you the first impression of the new system, but they also may identify things you may not have thought of. Let the pilot group work out the kinks.

The Art of Change Management



The success of your rollout depends on two things: learning how to use the new system and changing old habits.

Tallie is an "end-user" based system. This means that the end-users do a little work, approvers do a little work, administrators do a little work, and ultimately, it's less work for everyone.

We often find Managers and Administrators still doing the clean-up on their employees' expenses, long after going live on Tallie. This creates a lot of frustration. Not only are they doing the same work, they are learning a new system to boot!

Tallie can take care of the "learning how to use it" part, but the real change management takes place with you – enforcing the use and the correct resources for help.

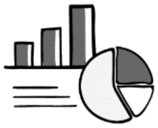
Our best advice: have employees fix their own errors and lean on Tallie to take care of the questions.

Disapprove reports if needed, and direct questions to Tallie Support. It is up to the Managers and Administrators to help enforce the behavior change to really see the value of Tallie.

Let's face it - when employees need help, they want to talk to someone they know instead of calling a mystery tech Support line. We ask that you guide employees to give our Support team one chance for a completely different level of customer service. Our Support Experts know all the tips and tricks, current issues/bugs and handy workarounds, and they ultimately live up to their name – the experts!

Getting the employees in the right habits only makes it easier for everyone. If everyone does their little piece of the puzzle, everyone feels the difference.

Miscellaneous Tips



- **Hold managers accountable** to help manage the change within their own teams; disapprove expenses, send disapproval reasons for education, and send reports back to submitters for correction.
- Use **Analytics** to monitor behavior and the status of expense reports.
- Use **loose policy limits** to start, if possible. Use reporting to identify policy changes needed after a few months.
- Refer to the **New Account Setup** list for a comprehensive list of items to complete while implementing.

Free Training Resources

Recorded Training

Tutorial Videos

Help Center

help.tallie.com

Great, but… where do I start?

- Logging into Tallie for the First Time
- Getting Started with Tallie
- Linking a Credit Card
- Adding Receipts Using the Tallie Mobile App

Report Submitters

- Submit receipts often
- Enter mileage on-the-go on the **Tallie Mobile App**
- Submit reports often instead of saving hundreds of receipts/expenses on the **Purchases** page

Report Approvers

- Send **reasons** for disapproval
- Approve via **email or online**
- Use **Analytics** to find unsubmitted reports

Administrators

- Confirm accounts are mapped to **credit cards** to ensure **exports** work correctly
- Export reports from the **Exports** page

FAQs from New Tallie Users

How do I add my corporate credit card to submit my expenses?

Credit cards are stored in the Credit Card Tab.

- For personal cards, select, "I use a different type of card," and follow the screen prompts.
- For corporate cards, Administrators may add them for you. If not, please reach out to Tallie Support.

See: Linking a Credit Card

Which ways can I add my receipts?

- Email: one email = one receipt
- Tallie Mobile App: photo of both receipts together. One photo = one receipt image.
- Upload: One selected file = one receipt

How do I create an expense report for someone else?

After an administrator enables Executive Assistant to a user's profile, that profile will be accessible from the assignee's drop-down menu in the upper right-hand corner of their home page.

See: Using Executive Assistant

Where is my report?

To view the status of an expense report, use the Expense Reports page.

See: Sorting Expense Reports

Announcement Email Sample

Try this sample email to tackle questions right from the start.

NEW EXPENSE MANAGEMENT PROCESS!

Tallie Expense Solution

Launch Date: [insert date]

Effective this date, all employees must create and submit expenses using Tallie.

Who is Tallie?

Tallie is a cloud-based management solution that is simple; you can submit and approve expenses easily.

Why change the current process?

The current process is labor intensive for the expense report submitters and approvers. An automated workflow allows expense reports to be created, submitted, and approved much faster.

Why Tallie?

The ease of use, available support and training, and simple user interface were key factors in partnering with Tallie.

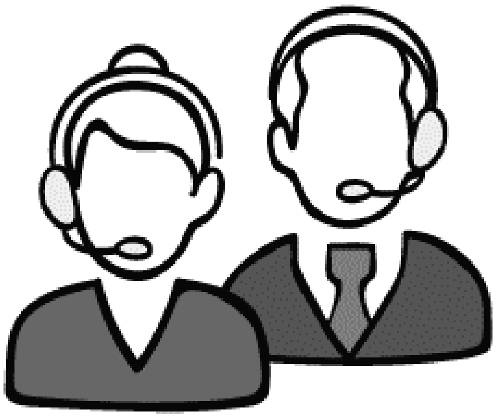
What's Next?

You will receive an invitation email to log in. Upon receiving the email, please set up your account and begin creating and submitting expense reports.

Numerous tutorial videos and Help Center articles are available.

Tallie Live Support is available Monday-Friday at 1-888-874-1118 ext. 2. You may also send an email to support@usetallie.com. Tallie Support is also available via Live Chat in the Help Center.

Your Tallie Team



Tallie Support

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