

TravelBank

11 T&E Dashboards and **Reports** to Uncover Your Most Important Data

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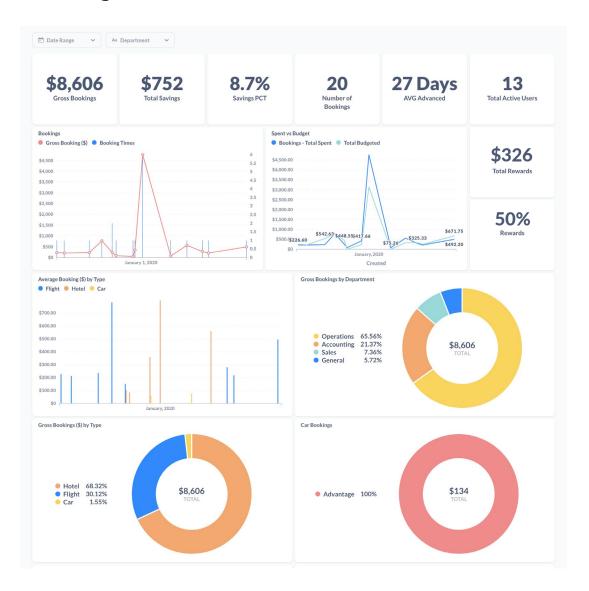
In a survey of almost 2,400 Finance leaders across different industries, we found business travel expenses are one of the most difficult to control.

Dashboards

In this lookbook, we share **two dashboards** for proactively monitoring T&E trends, compliance, and anomalies, plus the **nine most common reports** used by our 20,000 customer organizations.

With expenses and bookings captured in one place, companies can unlock more powerful insights:

- Automate Alerts Receive triggered alerts in your inbox anytime there's an exception or a threshold is met.
- Get Data at a Glance Track top savers, approval compliance, high spend items, airfare and hotel booking leakage, and outstanding expense reports.
- Measure Spend Monitor the high-level state of your organization or team's spend, identify how often employees are booking over or under budget, and view expense spend by category.
- Predict Costs Use historical data to help forecast future spend and improve employee behavior.
- Deep Dive Reporting Answer specific questions, like:
 - Who are the most expensive or common vendors across airfare, lodging, or software?
 - Who are the highest spenders, and how timely are their expense submissions?
 - Is employee compliance with the booking platform changing over time?



In this dashboard:

- Track gross bookings cost, total bookings numbers, and how spend compares to budget.
- Monitor and **improve how far in advance** employees book travel.
- Visualize how bookings are spread across departments, and by flight vs. hotel vs. rental car.
- If you're using <u>incentives</u> **see how much employees are saving** by making smarter choices.

Expense Reports Dashboard



In this dashboard:

- Track the total and monthly trends of expense report volumes.
- Track the ratio of created vs. approved reports.
- Visualize how bookings are spread across departments, and by category.
- · See top expenses at a glance.

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Flight Bookings Report



Dashboards

In this report: Track traveler information and trip details, including how far in advance flights are booked, the length of each trip, change fees, and how flight prices compare to budgets. Receipts are directly linked.

Hotel Bookings Report



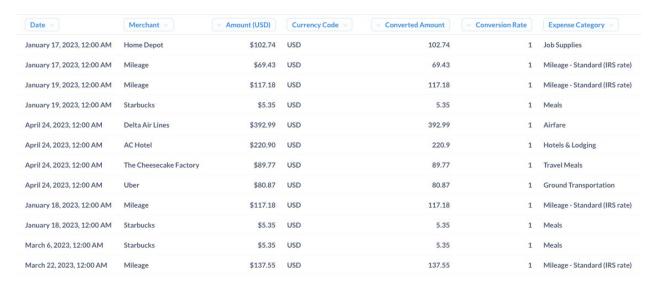
In this report: Monitor rental information, including how far in advance rental cars are booked, the length of each trip, and see **holistic spending across each merchant**.

Car Bookings Report



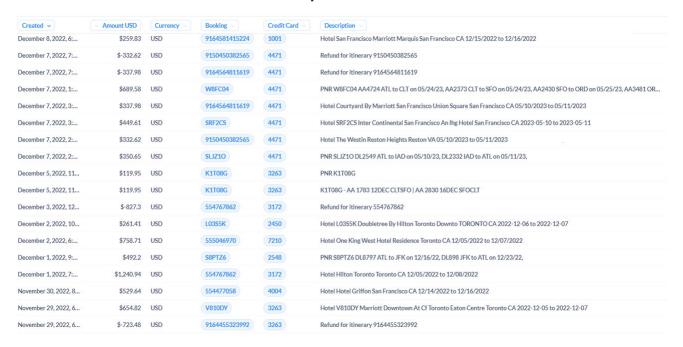
In this report: Monitor rental information, including how far in advance rental cars are booked, the length of each trip, and see **holistic spending across each merchant**.

Total Reimbursed Report



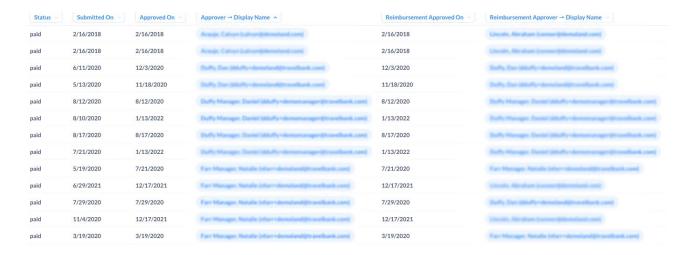
In this report: See all reimbursements by their currency code, converted amount, and expense category. Customize with additional fields, including: employee name, customer name, department, description, mileage, receipt links, reimbursement status, expense type (i,e. Mileage vs. receipt), or custom fields defined by your organization.

Total Travel Transactions Report



In this report: See all hotel and flight transactions, including refunds and trip descriptions. If there is a major air travel disruption, travel managers or HR can find every flight booking number at a glance.

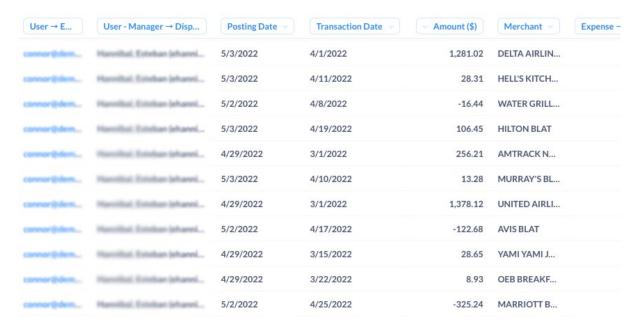
Total Reports Approved by Finance



In this report: Measure how quickly expense reports are submitted, approved, and reimbursed, and immediately identify the approver.

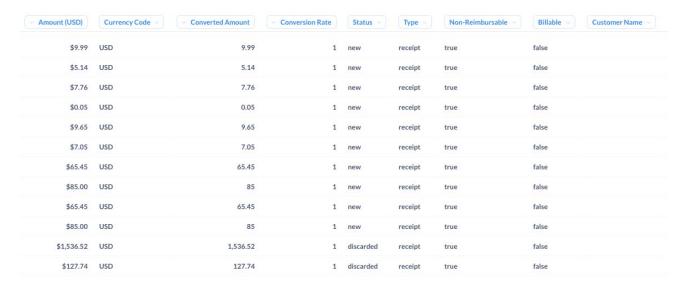
Credit Card Reconciliation Report

Dashboards



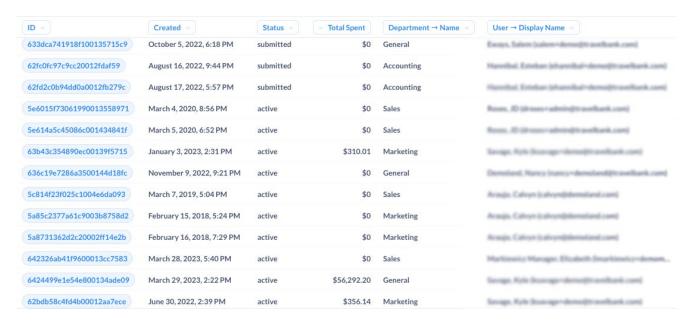
In this report: See transaction costs and dates across all users and merchants, before expense reports are created and/or submitted.

All Expenses Report



In this report: See every expense, including if it's reimbursable or billable.

Reports Created but not Submitted (Accrual)



In this report: Quickly accrue future travel and expenses by department, and see which reports are drafted, but not yet submitted.

TravelBank



TravelBank is the all-in-one travel, expense and corporate card management software, powering data-backed travel and financial decisions for more than 20,000 companies.

TravelBank helps reduce company expenditure by 30% on average while improving employee happiness through a user-friendly design, fast expense reimbursements, and travel rewards program.

Organizations of all sizes can harness the experience of TravelBank's in-house travel team alongside a dedicated customer success team for 24/7 concierge-level support, available by phone, email, or chat.

Learn how to better manage your company's T&E spend by visiting TravelBank.com >



"TravelBank has allowed us to track our spending with fantastic reporting and analytics. This helps us budget accurately and monitor the spending habits of our users"

RAYMOND L, LENDING HOME



"TravelBank has provided us with excellent visibility into our employee bookings. We can see spend as a whole and within departments, and easily spot issues, such as users booking flights <7-14 days out."

KANDI PHILLIPS, CLEARLINK