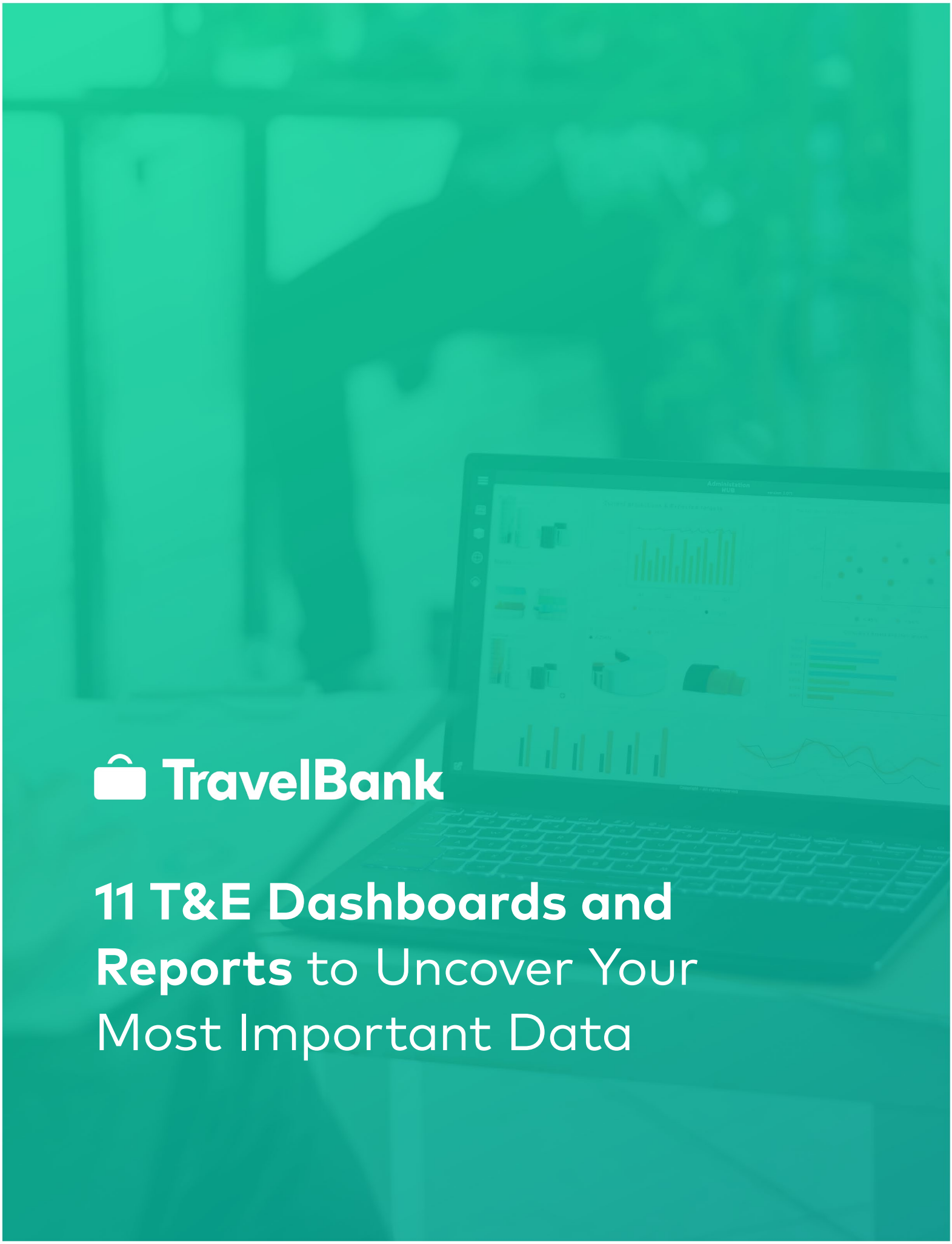

TravelBank

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.

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?

Travel Bookings Dashboard

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 incentives – **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**.

Flight Bookings Report

Flights Booking List

Date Range | Department

Days Advanced Purchase	Length Of Trip	Merchant	Source	Status	Credit Card	Base Price	Taxes	Total Price	Budget	Receipt	Change Fee	Over Budget Amt
8	0	TravelBank	app	canceled	1882	$315.35	$38.55	$353.90	$309.92	Download Receipt >	$0	$43.98
7	0	TravelBank	app	completed	1882	$315.35	$38.55	$353.90	$303.81	Download Receipt >	$0	$50.09
5	0	TravelBank	app	completed	1882	$440.93	$57.27	$498.20	$416.22	Download Receipt >	$0	$81.98
32	2	TravelBank	app	completed		$436.28	$62.52	$498.80	$281.58	Download Receipt >	$0	$217.22
12	2	American Airlines	app	completed	1000	$223.26	$46.54	$269.80	$258.08	Download Receipt >	$0	$11.72
19	5	Air Canada	app	completed	2028	$1,694.00	$304.06	$1,998.06	$780.21	Download Receipt >	$0	$1,217.85
6	1	TravelBank	app	completed	7737	$239.33	$47.75	$341.08	$396.58	Download Receipt >	$0	$0
11	0	TravelBank	app	completed	6862	$317.21	$47.99	$365.20	$481.03	Download Receipt >	$0	$0
16	0	TravelBank	app	completed		$51.00	$41.53	$92.53	$254.35	Download Receipt >	$0	$0
5	5	American Airlines	app	completed	1701	$413.02	$79.38	$492.40	$565.25	Download Receipt >	$0	$0

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

Hotel Bookings List

Date Range | Department

Length Of Trip	Travel Start Date	Travel End Date	Status	Credit Card	Base Price	Taxes	Total Price	Budget	Receipt	Change Fee	Over Budget Amt	Hotel Name
4	March 6, 2023	March 10, 2023	completed	8039	$634.10	$118.33	$929.43	$1,106.94	Download Receipt >	$0	$0	Villa Florence Sa
4	March 20, 2023	March 24, 2023	completed	2008	$838.32	$146.87	$985.19	$868.76		$0	$116.43	Marriott Downt
2	March 1, 2023	March 3, 2023	completed		$1,068.00	$177.37	$1,245.37	$0		$0	$1,245.37	Marriott Marqu
1	March 1, 2023	March 2, 2023	completed	4602	$419.00	$70.82	$489.82	$544.72	Download Receipt >	$0	$0	Residence Inn B
3	March 1, 2023	March 4, 2023	completed	9240	$465.60	$70.96	$536.56	$958.17	Download Receipt >	$0	$0	Portofino Inn Bu
1	February 28, 2023	March 1, 2023	completed	6719	$169.00	$34.75	$203.75	$250.00	Download Receipt >	$0	$0	Hampton Inn Su
2	March 14, 2023	March 16, 2023	canceled	9722	$844.19	$174.52	$1,018.71	$395.89	Download Receipt >	$0	$622.82	W Dallas Victor
4	March 2, 2023	March 6, 2023	completed	3392	$646.00	$90.63	$736.63	$777.27		$0	$0	Hilton Garden In
1	March 1, 2023	March 2, 2023	completed		$189.00	$37.24	$226.24	$262.85	Download Receipt >	$0	$0	The Westin Long
1	March 31, 2023	April 1, 2023	canceled	6224	$146.30	$24.44	$174.74	$192.00	Download Receipt >	$0	$0	Holiday Inn Exp

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

Cars Bookings List

Date Range | Department

Days Advanced Purchase	Length Of Trip	Booking Date	Travel Start Date	Travel End Date	Merchant	Base Price	Taxes	Total Price	Source	Status	ACRISS
1	2	March 1, 2023, 1:27 AM	March 2, 2023, 5:00 PM	March 4, 2023, 8:00 PM	Avis	$172.77	$81.08	$253.85	app	completed	FCAR
1	2	March 1, 2023, 6:41 AM	March 2, 2023, 12:00 AM	March 3, 2023, 10:00 PM	Enterprise	$124.00	$47.27	$171.27	app	completed	FCAR
40	2	March 1, 2023, 3:11 PM	April 10, 2023, 7:00 PM	April 12, 2023, 5:00 PM	Enterprise	$130.00	$9.50	$139.50	app	completed	CFAR
12	2	March 1, 2023, 3:16 PM	March 13, 2023, 4:00 PM	March 15, 2023, 4:00 PM	National	$96.00	$35.84	$131.84	app	completed	ICAR
14	1	March 1, 2023, 3:17 PM	March 15, 2023, 2:30 PM	March 16, 2023, 12:00 PM	Enterprise	$57.94	$6.87	$64.81	app	completed	ICAR
11	6	March 1, 2023, 3:26 PM	March 12, 2023, 4:00 PM	March 18, 2023, 4:00 PM	Budget	$269.99	$33.20	$303.19	app	completed	IFAR
5	1	March 1, 2023, 3:32 PM	March 6, 2023, 9:00 PM	March 8, 2023, 3:00 AM	Enterprise	$130.00	$9.50	$139.50	app	completed	CFAR
55	2	March 1, 2023, 3:36 PM	April 25, 2023, 3:00 PM	April 27, 2023, 11:30 PM	National	$226.29	$65.02	$291.31	app	completed	FCAR
14	1	March 1, 2023, 3:41 PM	March 15, 2023, 12:00 PM	March 16, 2023, 12:00 PM	Enterprise	$74.04	$14.80	$88.84	app	completed	ECAR
64	0	March 1, 2023, 3:56 PM	May 4, 2023, 5:00 PM	May 5, 2023, 1:30 AM	National	$44.00	$19.32	$63.32	app	completed	ICAR

Visualization Settings Showing first 2,000 rows

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

Total Reimbursed

Date	Merchant	Amount (USD)	Currency Code	Converted Amount	Conversion Rate	Expense Category
September 22, 2022, 12:00 AM	Delicious Donuts	$46.02	USD	46.02	1	Meals - Customer
December 20, 2021, 12:00 AM	Mileage	$55.44	USD	55.44	1	Mileage - Standard (IRS rate)
January 4, 2022, 12:00 AM	Mileage	$36.91	USD	36.91	1	Mileage - Standard (IRS rate)
December 16, 2021, 12:00 AM	Mileage	$55.44	USD	55.44	1	Mileage - Standard (IRS rate)
September 13, 2022, 12:00 AM	VON Conference	$1,814.58	USD	1,814.58	1	Nursing Professional Development (C
April 12, 2022, 12:00 AM	Mileage	$36.91	USD	36.91	1	Mileage - Standard (IRS rate)
May 18, 2022, 12:00 AM	Mileage	$36.91	USD	36.91	1	Mileage - Standard (IRS rate)
January 20, 2022, 12:00 AM	Vitales	$83.21	USD	83.21	1	Meals
June 6, 2022, 12:00 AM	Mileage	$10.06	USD	10.06	1	8000-8300 Mileage
June 7, 2022, 12:00 AM	Mileage	$3.92	USD	3.92	1	8000-8300 Mileage
June 9, 2022, 12:00 AM	Mileage	$8.37	USD	8.37	1	8000-8300 Mileage
June 13, 2022, 12:00 AM	Mileage	$10.06	USD	10.06	1	8000-8300 Mileage

Visualization Settings Showing first 2,000 rows

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

Travel Transaction Report

ID	Created	Amount USD	Currency	Booking	Credit Card	Description
	June 1, 2023, 6:55 PM	$-123.25	USD		8847	Refund for itinerary
	June 1, 2023, 6:52 PM	$731.9	USD		1826	AUS to SFO on 06/11/23,
	June 1, 2023, 6:52 PM	$208.95	USD		5827	LGA to IAD on 06/02/23,
	June 1, 2023, 6:51 PM	$502.4	USD		1044	CVG to DEN on 06/05/23
	June 1, 2023, 6:50 PM	$-731.9	USD		1826	Refund for itinerary
	June 1, 2023, 6:47 PM	$731.9	USD		1826	AUS to SFO on 06/11/23
	June 1, 2023, 6:45 PM	$301.88	USD		3211	Hotel Indigo Rochester Downtow
	June 1, 2023, 6:45 PM	$378.7	USD		7961	JAX to JFK on 06/07/23,
	June 1, 2023, 6:44 PM	$529.79	USD		6514	DEN to DFW on 06/05/23,
	June 1, 2023, 6:44 PM	$320.4	USD		7961	BOS to JAX on 06/05/23,
	June 1, 2023, 6:43 PM	$301.22	USD		4225	Hotel Hampton Inn Joplin MO 06/07/2023 to
	June 1, 2023, 6:42 PM	$528.15	USD		3211	SAT to DEN on 06/19/23,

Save Visualization Settings Showing first 2,000 rows

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

Reports Approved by Finance

Status	Submitted On	Approved On	Approver	Reimbursement Approved On	Reimbursement Approver	Total Spe
paid						$1,273
paid						$602
paid	8/26/2018	8/28/2018		8/28/2018		$2,607
paid	1/31/2018	1/31/2018		1/31/2018		$1,539
paid						$1,373
paid						$168
paid						$841
paid		8/31/2017		8/31/2017		$7,894
paid		6/1/2017		6/1/2017		$8,931
paid		10/31/2017		10/31/2017		$10,039
paid	3/5/2018	3/7/2018		3/7/2018		$10,741
paid	6/13/2018	6/18/2018		6/18/2018		$9,104

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

Credit Card Reconciliation Report

Credit Card Reconciliation Report

Email	User - Manager → Display Name	Posting Date	Transaction Date	Amount ($)	Merchant	Expense -
			7/22/2021	170.00	Docker	
		5/3/2022	4/16/2022	243.75	OCEAN PRIME BLAT	
		4/29/2022	3/24/2022	12.45	CAFE LE HOBBIT BLAT	
		5/3/2022	4/25/2022	325.24	MARRIOTT BLAT	
		5/2/2022	4/22/2022	-16.54	ALBERTA COOP BLAT	
		4/29/2022	3/6/2022	33.28	HAPA SUSHI GRILL BLAT	
		5/2/2022	4/10/2022	-68.20	ASPEN LIMO BLAT	
		4/29/2022	3/24/2022	16.37	TAXI LAURIER BLAT	
		5/3/2022	4/1/2022	824.56	CANADIAN NATIONAL BLAT	
		4/29/2022	3/14/2022	9.45	FLYING BISCUIT CAFE BLAT	
		5/3/2022	4/4/2022	25.53	YELLOW CAB BLAT	
			8/5/2021	59.00	Branch	

Visualization Settings Showing first 2,000 rows

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

All Expenses Report

All Expenses

Amount (USD)	Currency Code	Converted Amount	Conversion Rate	Status	Type	Non-Reimbursable	Billable	Customer Name
$136.03	USD	136.03	1	new	receipt	true	false	
$82.98	USD	82.98	1	queued	receipt	false	false	
$12.57	USD	12.57	1	queued	receipt	false	false	
$222.80	USD	222.8	1	queued	receipt	false	false	
$154.13	USD	154.13	1	queued	receipt	false	false	
$46.02	USD	46.02	1	new	receipt	false	false	
$5.29	USD	5.29	1	queued	receipt	false	false	
$12.00	USD	12	1	new	receipt	true	false	
$44.17	USD	44.17	1	new	mileage	false	false	
$7.30	USD	7.3	1	queued	receipt	false	false	
$67.00	USD	67	1	queued	receipt	false	false	
$80.73	USD	80.73	1	new	mileage	false	false	

Visualization Settings Showing first 2,000 rows

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

Reports Created but not Submitted (Accrual)

Reports Created But Not Submitted

ID	Created	Status	Total Spent	Department → Name	User → Display Name
	October 16, 2022, 7:32 PM	submitted	$748.10		
	October 16, 2022, 7:34 PM	submitted	$1,201.58		
	May 30, 2023, 7:03 PM	submitted	$24.72		
	May 4, 2023, 2:40 PM	active	$2,914.15	8 - Owners	
	March 9, 2018, 5:41 PM	submitted	$137.90		
	March 9, 2018, 4:39 PM	submitted	$100,010,122.49		
	March 9, 2018, 6:01 PM	submitted	$25.00		
	March 9, 2018, 8:26 PM	submitted	$937.15		
	March 9, 2018, 8:30 PM	submitted	$185.68		
	March 9, 2018, 7:38 PM	submitted	$538.72		
	May 12, 2019, 2:47 PM	active	$51.59		
	March 9, 2018, 9:25 PM	submitted	$206.64		

Visualization Settings Showing first 2,000 rows

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

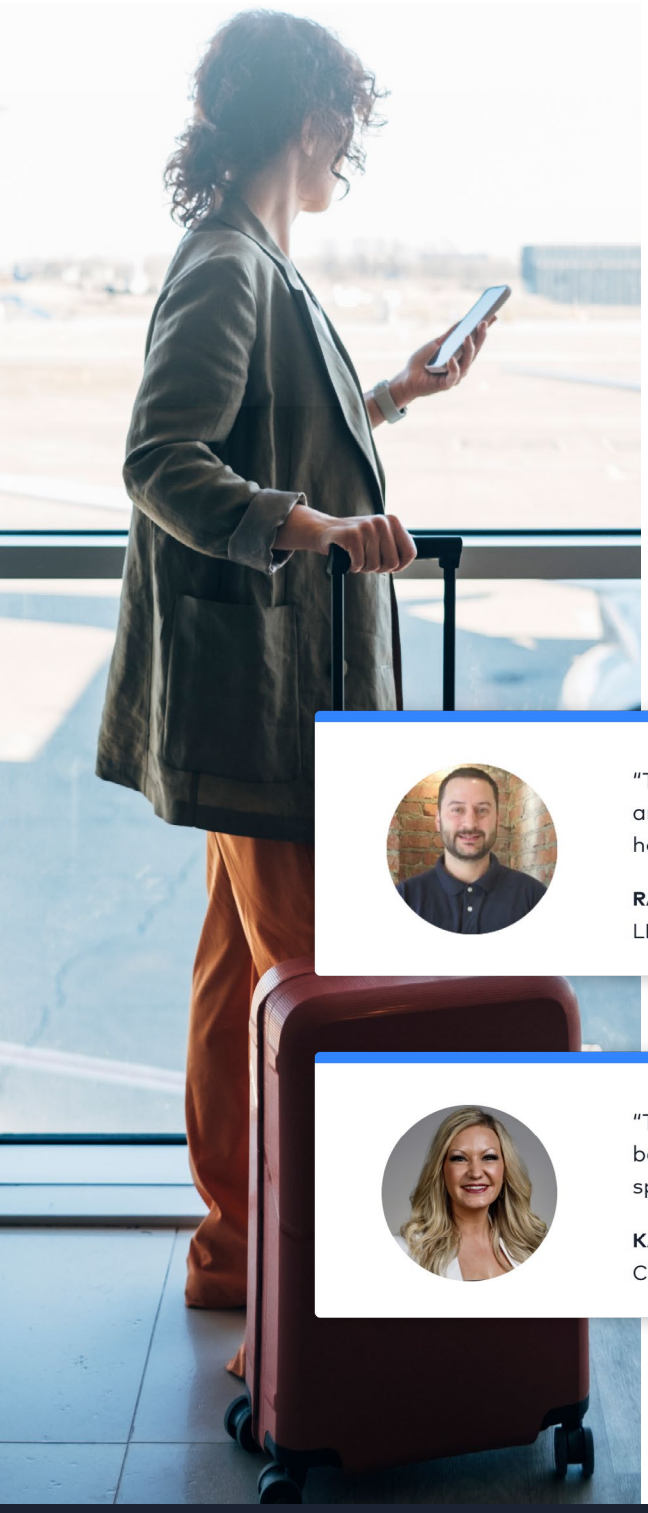
TravelBank

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