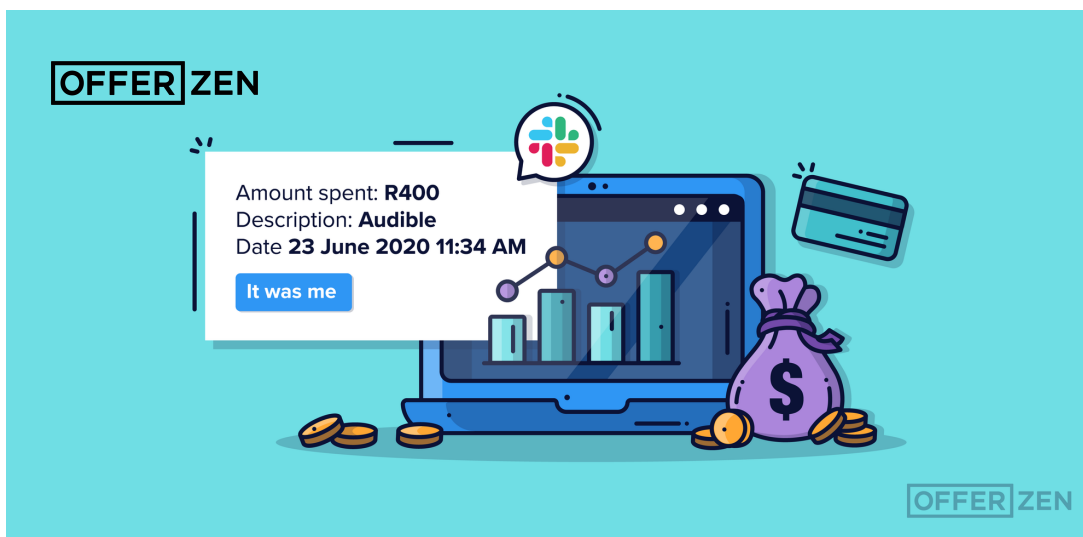# **OfferZen:** Managing team spend & creating transparency on company expenses

OfferZen is a job marketplace for software developers. They are a remote-first company, with employees across South Africa and Europe. Every team member has access to a shared team card to spend money and is given heuristics around how to spend, with the ultimate goal that everyone is empowered to do their job better.

The Problem: Manually managing employee purchases and compiling spend data

Empowering employees to independently spend money requires a way to track expenses, without taking up valuable time from employees. OfferZen found that their finance team was spending hours every month trying to track and manage purchases.

The Solution: Immediate expense claims and categorisation, and spend data formatting

The OfferZen team built **Roz** – a simple app that uses Investec Programmable Banking and is affectionately named after the character from Monsters Inc. It works like this:

- All teams are given access to a shared Programmable Banking card to make purchases.
- Any spend on the card is sent to the appropriate team's Slack channel, where they can claim the purchase, categorise it and upload their receipt via Dext.
- This information is fed into the app, which the finance team has administrative control over.
- The app updates the spend claims automatically and creates a CSV export into the format required for upload into their accounting software.

Winning with Investec Programmable Banking

- Employees are empowered to categorise their own spending, a process that would usually take the finance team a lot of time.
- Recurring expenses are automatically categorised each month.
- The CSV export saves the finance team from having to manually compile this information.