

Edelweiss Tokio Life Automates Petty Cash & Expenses, 2,000+ Man-hours Saved

Key Outcomes

100% digital petty cash and expense management	176 man-hours saved per month	17% efficiency gain with reduced headcount	100% real-time visibility across all branches
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“Happay brought complete transparency and control to our expense management. The platform is simple, reliable, and user-friendly, exactly what we needed. Notifications and real-time updates make tracking and approvals effortless”

— Finance Controller, Edelweiss Tokio Life Insurance

Customer Profile

Industry	Insurance
Presence	Pan-India
Employees	4000+
Previous	Fyle with manual intervention
Solution Highlights	Travel & Expense Suite: Xpendite, FileX, Petty Cash, ReportFlow, Cards, SmartAudit, Approval & Workflow Engine, Integrations (HRMS, ERP)

Challenges Before Happay

- ✗ Offline petty cash and reimbursement processes caused delays, limited visibility, and increased finance workload.
- ✗ 120+ petty cash users & 6000 employees submitted expenses manually, while a 6-member finance team managed the entire process, spending nearly 1,056 man-hours each month just on validation and reconciliation.
- ✗ The system lacked real-time visibility, making it difficult for finance leaders to monitor cash flow, track approvals, or identify compliance issues promptly.
- ✗ With Fyle exiting India, the company needed a compliant and scalable expense platform to ensure business continuity.

Solutions by Happay

- ✓ After evaluating multiple platforms, Edelweiss chose Happay for its intuitive UI/UX, scalability, and enterprise-grade compliance framework.
- ✓ Happay digitized both petty cash and employee reimbursement workflows, turning an offline, paper-heavy process into a fully automated, transparent system.
- ✓ The mobile-first interface allowed employees to submit expenses, upload bills & track approvals seamlessly, improving overall adoption & timeliness.
- ✓ Finance teams gained real-time dashboards for expense tracking, reconciliation, and policy compliance, eliminating any manual monitoring.
- ✓ Automated notifications and alerts ensured faster approvals and reduced back-and-forth communication between employees and finance teams.



Happay is a full-suite Travel & Expense platform trusted by 8,000+ businesses worldwide. It unifies travel bookings, expense capture, compliance, and reimbursements — helping companies save costs, stay compliant, and offer a smoother employee experience.

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