



A Zip customer
success story

Innovative Automation: How Instabase Elevated Procurement Operations with Intake-to-Pay

About Instabase

Spokesperson

Monette Quintanilla,
Instabase Accounting Manager

Industry Technology

Company Size 350

Headquarters San Francisco, CA

Tech Stack

NetSuite, Slack, Okta, Freshservice, Zendesk

Key Zip Features

PO/PR to ERP
ERP Vendor Sync
Vendor Onboarding
Renewals
Multiple Approval Workflows



Executive Summary

Seeking a time-efficient, money-saving procurement workflow for the company's lean team, Instabase wanted a solution to put rogue spending in check, improve efficiencies, and augment global capabilities at scale.

When vetting solutions, Instabase sought a solution for large contract payments and virtual cards for fast one-time payments. Getting operational spending under control and gaining visibility to reduce future costs was a priority.

Coupled with Zip's intake-to-procure solution, Zip's procure-to-pay (P2P) solution made it easier for the Instabase team to track spend by centralizing and automating procurement operations. Zip's virtual cards feature also simplified spend request process for Instabase team members—an important feature for maximizing Instabase's workflow efficiency.

By implementing Zip's procurement solution, Instabase was able to increase productivity and procurement efficiency while meeting compliance requirements—all at a cost saving. Instabase remains at the forefront of automation innovation and continues to provide the consistent service its clients expect.

We've been able to button up our spending and get the visibility necessary to reduce future costs.

Monette Quintanilla, Instabase Accounting Manager

Challenge: Improve workflows through automation

Instabase, founded in 2015, has grown exponentially—and fast. Instabase payments are mostly for larger annual contracts with software vendors and projects. With multi-million dollar investments on a regular basis, Instabase needed an automated system.

Before seeking a procurement solution, the Instabase procurement process was slow, with many bottlenecks. With such a small team, Instabase employees spent far too much time tracking payment requests. Team members were challenged to manage every dollar that went in and out of their doors, requesting spending without a straightforward system for payment approvals.

Instabase needed an easy and secure procurement solution. Other solutions were risky and confusing for vendors, requiring too much user training. A new workflow needed to be adopted and time-efficient for team members.

Solution

Zip's solution supports Instabase with a unique intake-to-pay solution that automates spending from request to payment. Spend approvals, purchase order creation, and invoice processing is fully automated from one central location. Zip handles all large contract payments, operational expenses, and virtual cards for fast one-time payments.

Result

The Instabase accounting team has saved over 20 hours a week with Zip's intake-to-pay system. By automating processes, Instabase has increased the efficiency of its team.

We like Zip's commenting feature that allows us to tag other stakeholders. For people who are making requests, this is crucial. It's easy to go through all of our questions easily. We are also able to loop in department heads to ensure they are aware of large spending and consistently get spend insights.

Monette Quintanilla, Instabase Accounting Manager

Challenge: Global compatibility

Instabase encountered a finance workflow obstacle when they were looking to make payments globally. They tried other procure-to-pay options that only supported multi-subsidiary for the U.S. dollar. What they needed was a solution in support of multi-subsidiary, multi-currency workflows. Instabase was tired of entering approvals manually, and they needed a one-stop solution.

Solution

Zip automates and centralizes all aspects of the procurement process, including new UK offerings and syncing features with NetSuite.

Result

Zip provides a multi-subsidiary, multi-currency payment system. This increases Instabase's international capabilities to broaden its market.

“We needed a system where the source of truth for approvals goes to our accounting systems. Zip provided that.”

Monette Quintanilla, Instabase Accounting Manager

Challenge: Visibility into spending

Finance drives the Instabase budget, so the Instabase team must have insights into spending. When Instabase leadership looked for a solution, they knew they needed to be able to allocate their resources in the most effective way possible and track customer requests and mitigate security risks while remaining within budget. Instabase's growth required actionable data and comprehensive process management.

Solution

Zip has provided Instabase with valuable data and analytics on its spending, payments, and supplier renewals for better-informed decisions. Zip's centralized intake-to-pay solution supports the Instabase team in reducing overall risk and gaining better visibility into their procurement processes.

Result

Instabase has effectively decreased overall spend request or vendor onboarding cycle time. They experienced new approval SLAs, reductions, and improvements to target SLAs, decreasing the time spent by employees managing procurement requests.

Overall, Instabase increased spending visibility and reduced rogue spending. Additionally, Instabase's implementation of Zip's automatic renewal system improved the visibility of negotiation and review processes.

“We have drastically reduced rogue spending with Zip. If we don't see a PR in the system, we enter it before paying. This buttons up spending and bolsters the bottom line.”

Monette Quintanilla, Instabase Accounting Manager

Conclusion

Instabase's investment in Zip resulted in increased workflow efficiency, global compatibility, and an overall reduction in rogue spending. By streamlining the procurement process and automating manual tasks, Instabase has increased its automated efficiency and reduced its overall operating costs. The Instabase team is excited about the white glove service onboarding with Zip, noting a very efficient process with lots of good product support.