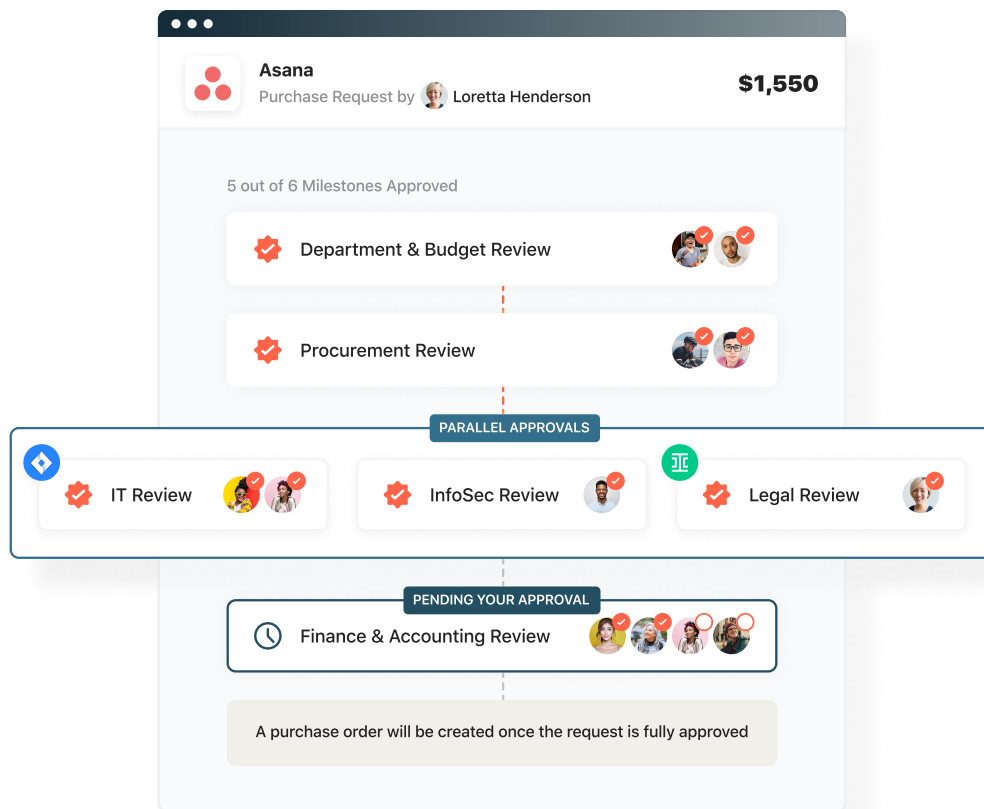## Spend Management Platform

Guided Procurement

Finally, a way to eliminate the confusion, risk, and friction for employees whenever they need to make a purchase. Airbase guides employees to gather the right information and documentation needed by all stakeholders — like IT, procurement, security, and legal — before a purchase is made.

Airbase integrates with the software these stakeholders rely on with a process that is configurable to reflect your company's policies, and dynamic to respond to different types and sizes of transactions and payments. Guided Procurement ensures compliance with all stakeholder requirements.

Asana
Purchase Request by Loretta Henderson   **$1,550**

5 out of 6 Milestones Approved

Department & Budget Review

Procurement Review

PARALLEL APPROVALS

IT Review   InfoSec Review   Legal Review

PENDING YOUR APPROVAL

Finance & Accounting Review

A purchase order will be created once the request is fully approved

recharge

" Guided Procurement gives employees an easy way to gather necessary information for every purchase and route it automatically to all stakeholders, directly to the software they already use. Everyone involved, from the requestor to the stakeholders, gets a great user experience, and we get improved compliance, speed, and visibility to find more savings. "

Erin Marchbanks
Accounts Payable Manager
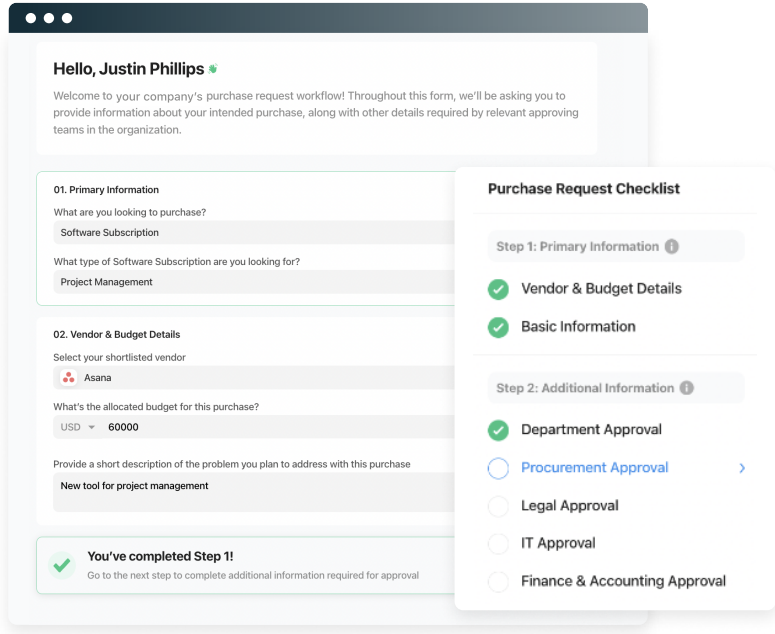
Eliminate compliance leakage with a centralized procurement process.

Streamline your purchasing process — from simple to complex — across multiple business groups and their systems.

Ensure employee compliance with policies through a simple, frictionless procure-to-pay experience.

## Benefits of Airbase Guided Procurement:

Guide employees through an automated procurement process that makes it easy to request and get approvals for spend.

Control risk — eliminate compliance leakage across all departments and automate the benefits of a centralized procurement process.

Unite stakeholders with a collaborative workflow that integrates with their systems, empowering the procurement team to focus on strategic spend.

Get complete and real-time visibility into all the steps of the procurement process within one consistent workflow.

Collaborative, integrated procurement — all stakeholders, all spend.
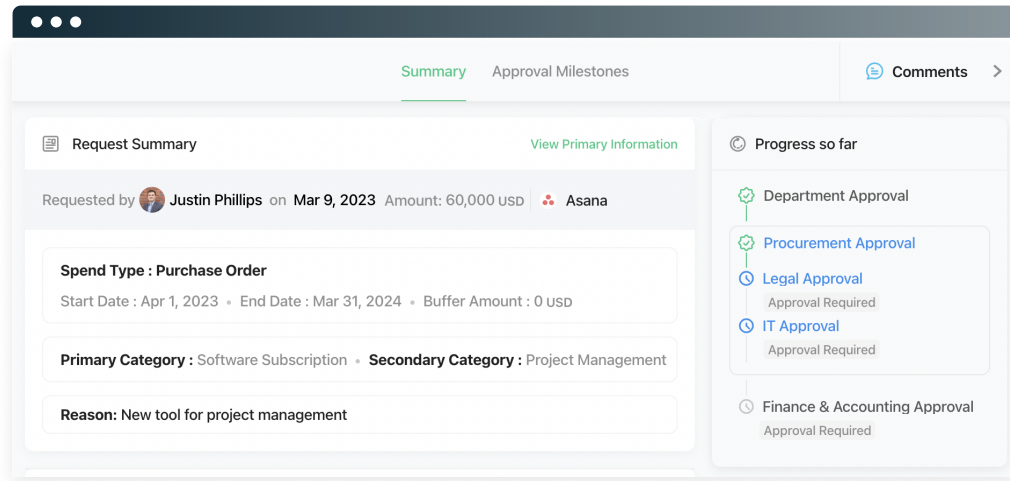
For Employees

Receive guidance on the information, forms, and approvals required for each stakeholder depending on the type and size of the purchase. Requirements for each business group, like SOC attestations, tax information, or contracts flow automatically to stakeholder systems. Employees also receive guidance on whether to create a PO or a virtual card for payment.
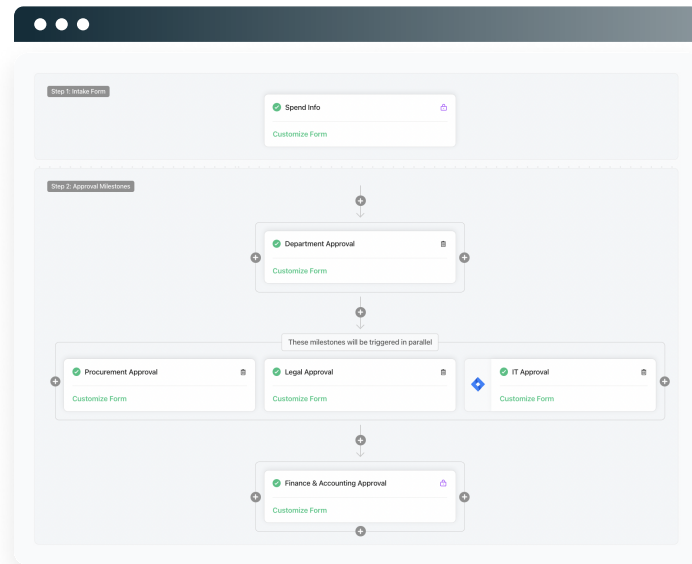
For Controllers

Control risk and ensure compliance. Airbase is a consistent, transparent platform that captures all documentation, approvals, and communication. No-code tools let you configure stakeholder routing requirements depending on the type and amount of spend. Capture the unique information and documentation requirements of procurement, IT security, legal, and other business groups, and form a complete audit trail of all activity.

airbase

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01. Pricing Details

This information will help the procurement team negotiate better terms with the vendor as part of the procurement process.

How often will the vendor be paid?

E.g. Monthly

Is there a discount for annual payments?

○ Yes ○ No

Does the vendor accept credit card payments with no processing fee?

○ Yes ○ No

Provide the name and email address of the vendor's Sales Representative or Account Manager

E.g. John Doe, john@example.com

Provide a link to the vendor's pricing details page

E.g. http://www.acme.com/pricing

How many licenses or seats are required?

Select

What tier or pricing plan are you planning to sign up for?

Enter the name of the pricing plan as shown on vendor's website

Provide additional comments (Optional)

Provide any additional information on the chosen tier, volume or number of licenses, etc.

Attach any pricing-related documents provided by the vendor (Optional)
Provide a document if the vendor's pricing page is missing relevant details

⬆ Drag and drop a file to upload or **Browse**

For Procurement

Empower procurement teams to focus on strategic spending. Ensure visibility into all spend to influence vendor selection and pricing before commitments are made. Easily communicate on vendor negotiations, help eliminate rogue, duplicate, and inefficient spend while driving cost savings. Get the visibility and control you need to approve, onboard, and manage vendors.

	Finance Approval	DONE
	IT Approval	DONE
	Legal Approval	PENDING

For Legal

Ensure company-wide compliance by automatically looping in legal when required. Connect your CLM system to Airbase and ensure legal workflows are followed. Update in either Airbase or the CLM and status is automatically reflected in both systems.
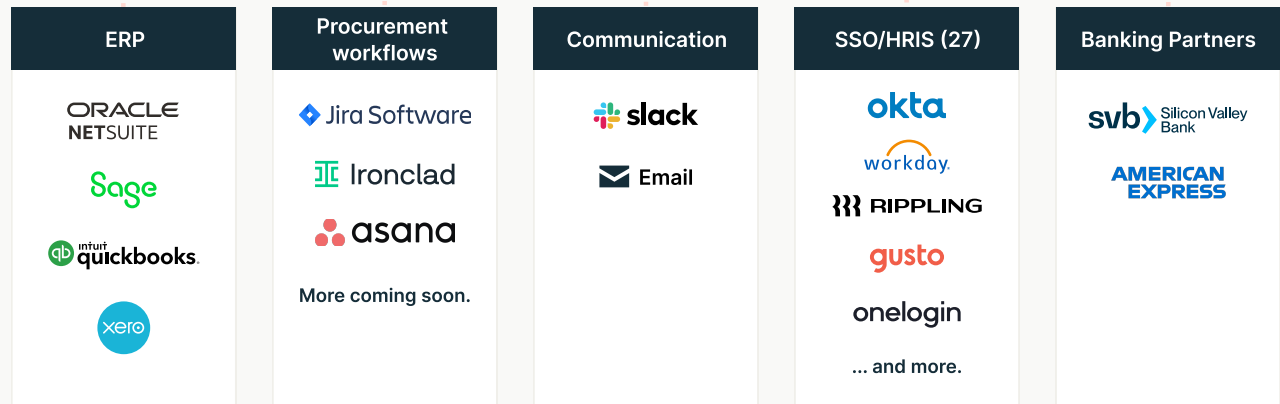
For IT Security
Control data security risk for all software purchases by automatically capturing critical documents like SOC attestations that are required for compliance. Airbase connects to your IT ticketing system, so you can easily manage reviews and approvals in the tool you already use.

How it works:

- **Admins** configure procurement workflows by setting milestones in the approval process and ordering them appropriately.

  - **Set up the approval matrix** to define milestones for each spend category.

  - **Create approval rules** to automatically pull in each required business group for a spend request.

  - **Customize forms** using custom fields like attachments, URLs, text, multiple choice, date, and more to capture the required information.

  - **Configure integrations** with your business software, such as Jira or Ironclad.

- **Employees** create a purchase request. They will be automatically guided through submitting the information required by the relevant business groups. Employees and spend approvers get complete visibility into the progress of their requests.

- **Procurement, legal, IT security, and other business groups** are looped in when required to evaluate and approve requests. If their business systems are integrated with Airbase, they can review and approve requests using their own system with changes and approvals triggered back to Airbase.

We connect to your ecosystem.

ERP	Procurement workflows	Communication	SSO/HRIS (27)	Banking Partners
ORACLE NETSUITE	Jira Software	slack	okta	svb Silicon Valley Bank
Sage	Ironclad	Email	workday.	AMERICAN EXPRESS
intuit quickbooks.	asana		RIPPLING	
xero	More coming soon.		gusto	
			onelogin	
			… and more.	

How our integrations work.

Airbase integrates with the systems that legal, IT security, or procurement teams use to track, document, and approve new purchases. Requests to spend that are logged in Airbase will trigger a task to review the transaction in the corresponding stakeholder software. Those teams can approve from within their existing systems and the approval status will automatically sync back to Airbase.

Every integration is simple to set up. Our onboarding specialists can ensure the integration is quickly configured for you. Stay tuned to learn more about our growing set of integrations with industry-leading enterprise solutions.

Why Airbase is the right solution for you.

- Consolidate the entire process — procure, pay, close.

- Configure simple, no-code workflows.

- Get real-time visibility into the payment status of vendors.

- Direct employees to use the most appropriate payment method based on the size and type of spend.

- Automate approval routing to parallel or sequential approvers and ensure that the procurement team is involved in all material purchase approvals.

- Get a complete audit trail across all non-payroll spend.

Airbase modern spend management combines guided procurement, accounts payable automation, expense management, and corporate cards. It's the best way to control spending, close the books faster, build a culture of compliance, and make teams more productive. Airbase brings efficiency to approvals, accounting, and payments with a process employees love.

Learn more: www.airbase.com | team@airbase.io