

## Spend Management Platform

# Workflow Builder

Increase efficiency and compliance by consolidating your business processes and spend approvals in one system.

The screenshot displays two overlapping workflow forms. The background form, titled '06. IT Security Checklist', includes fields for 'Division' (set to 'E.g. Marketing'), a question 'Will the supplier have access to sensitive information?' with 'Yes' and 'No' radio buttons, 'Main Administrator' (set to 'John Doe'), and a file upload area for 'Vendor evaluation attachment'. The foreground form, titled '07. Legal Review', asks 'Do you have a draft contract from the Vendor?' with 'Yes' and 'No' radio buttons, includes 'Duration of contract' and 'Tentative contract start date' dropdowns, a note to 'Use the Airbase NDA template and guidelines', and a 'Draft contract' section with a file upload area and a 'Browse' button. Both forms have a trash icon in the top right corner.

As your company grows, compliance and security requirements become more stringent. To enforce compliance, different business groups, like IT security and legal, must be involved in the purchasing process, making approval workflows more complex.

Airbase makes it easy for your teams to collaborate on spend requests and approvals in one system — helping you enforce compliance, save time, and reduce manual work.

### Benefits of Workflow Builder:



**Drive internal efficiencies** by consolidating all business processes and spend approvals in one system — eliminating the need for separate tools and manual work.



**Reduce risk** by capturing all spend information up front — giving you a complete audit trail to help you track approvals and validate spend decisions.



**Empower employees** to spend with confidence while remaining compliant and automatically loop in the right stakeholders.

## How it works:

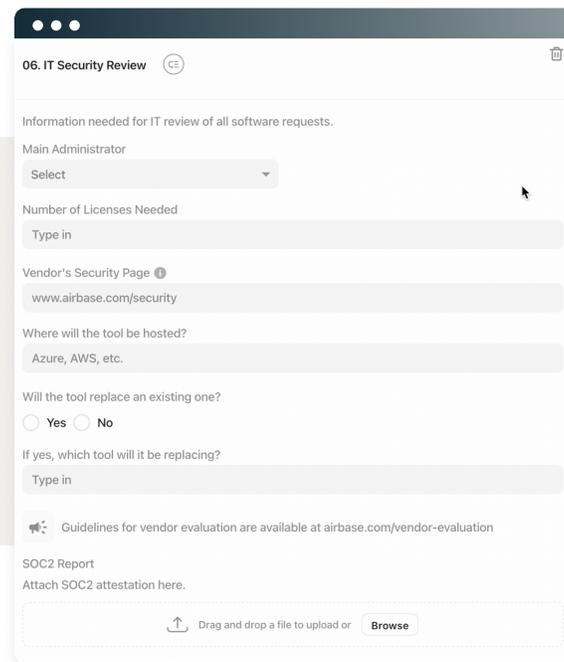
Workflow Builder makes it easy to capture all spend information required by IT, legal, finance, and other business groups — helping you ensure compliance and efficiency across your organization.

1. Customize your spend request forms using custom fields like attachments, URLs, text, multiple choice, date, and more to capture the information you need and reflect your company's approval workflow.
2. Build new sections in your forms and create custom rules that define the preset conditions for which the section will automatically appear for the spend requester.
3. Create advanced approval policies to ensure the necessary business groups, like legal or IT security, are pulled in to review and collaborate on the spend request when required.
4. View and approve all spend information in one place and capture a complete audit trail with every transaction.

## Use case example:

Enforce an IT security audit for all software-related spend requests from new vendors. This may include capturing information like the number of licenses needed, a link to the vendor's security page, where the tool will be hosted, and whether the tool will be replacing an existing one.

You may also want to add callout messages that guide employees and collect attachments like SOC2 reports.



The screenshot shows a web browser window with a form titled "06. IT Security Review". The form contains the following fields and sections:

- Information needed for IT review of all software requests.**
- Main Administrator:** A dropdown menu with "Select" as the current value.
- Number of Licenses Needed:** A text input field with "Type in" as a placeholder.
- Vendor's Security Page:** A text input field with "www.airbase.com/security" as the value.
- Where will the tool be hosted?:** A text input field with "Azure, AWS, etc." as the value.
- Will the tool replace an existing one?:** Radio buttons for "Yes" and "No", with "No" selected.
- If yes, which tool will it be replacing?:** A text input field with "Type in" as a placeholder.
- Guidelines for vendor evaluation are available at [airbase.com/vendor-evaluation](https://airbase.com/vendor-evaluation)**
- SOC2 Report:** A section with the text "Attach SOC2 attestation here." and a file upload area with a "Browse" button.