



# Tacala Chooses Palette AP Automation to Help Manage 300+ Franchise Locations

## *A Growing Franchise Business*

Tacala's Founders, Dick Reese and Don Ghareeb opened their first Taco Bell in 1989 in Columbiana, Alabama. Taco Bell locations have more than tripled in the past 30+ years, and Tacala has grown to over 300 locations in the Southeast and Texas.

May 2022, Palette Software became Rillion. The company name has not been changed in this story. To learn more, visit [www.rillion.com](http://www.rillion.com)

A woman wearing a dark blue Taco Bell uniform and cap, smiling and looking to the right. The background is a blurred view of a restaurant interior.

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## Tacala

Tacala is a leading franchisee of yum! Brands and the largest taco bell franchise operator in the us, with over 300 locations.

### COUNTRY

USA

### ERP

Microsoft Dynamics GP with MEM

### PALETTE SOLUTION

Invoice Processing, Contracts And Documents

### NUMBER OF INVOICES/YEAR

60,000

### USERS

70 in the company

Altamont Capital Partners invested in Tacala in 2012 and has helped drive explosive unit growth over the past eight years.

## The Challenge

Tacala is a leading franchisee of YUM! Brands and the largest Taco Bell franchise operator in the US. It has quick service locations in Alabama and five other Southeastern states. Some of the restaurants combine a Mexican fast food unit with other YUM! concepts, including KFC and Pizza Hut.

Tacala needed a solution that could help them manage recurring utility bills for all locations, as well as documents for human resources.

## Invoice Capture

Using an outsourced data capture service, Tacala's vendor invoices are captured and validated with a 98% accuracy rate. The invoices go to a queue, visible in the Palette dashboard.

## Recurring Invoices

With over 300 locations Tacala needed to manage utility bills and other recurring charges efficiently. In the past the processing of recurring invoices was done manually. Palette's contract module keeps track of contract terms and the software matches incoming service invoices to the proper contract amounts.

### **Approval Workflow**

An automated approval workflow sends non-PO invoices to project managers to approve via email, rather than having to enter the system. If an invoice goes over the tolerance level, the system automatically sends the approval to the supervisor.

### **KEY OUTCOMES**

- Invoice data capture automated with outsourcing service
- Contracts are matched to vendor invoices for utility bills and other recurring service charges for 300+ locations
- Approvers receive exceptions in a workflow showing all the information they need for reconciliation
- Seamless integration with Dynamics GP
- Auditing function helps manage investigations
- The Palette solution is designed to handle complex, multiple entity, multiple-location operations



*With our contracts being matched to vendor invoices for over 300 locations, Palette has reduced our manual workload and really optimized our AP operations.*

### **Carrie Self**

CPA, Tacala

### **Archive and Audit Trail**

The company was looking for a solution that could provide an audit trail and reporting for all the operations they manage.

Having a searchable invoice archive has been a big time saver. Once an invoice is paid it is transferred from Dynamics GP into the Palette archive.

AP automation with Palette saves time, lowers cost and improve efficiency gains for over 3 000 clients worldwide.

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