

Marketing Tech Leader Takes Control of Spending and Cuts Costs



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Technology

225 employees

Global

\$36k
saved by
eliminating
duplicate
payments

15
days saved on
month-end
closing process

1st
day AP
close
completed

Service Management Group (SMG) helps brands improve customer and employee experiences by collecting survey data and turning it into actionable insights. As the fully remote business grew internationally and became more technology focused, its finance team needed processes that could support a more complex organization.

Invoices and approvals were managed through email and File Explorer, with data entered manually into NetSuite. Corporate card charges and vendor payments lived in separate systems. Without centralized contract information, subscriptions could renew unnoticed, and spending continue after an employee left. The same finance team had to manage these gaps while supporting the business.

Led by Rachel Basham, Finance Systems Manager, they started with AP Automation and its NetSuite integration. After a year, the company expanded to [Expense Management](#), [Corporate Cards](#), and [Guided Procurement](#). Bringing these capabilities together gave the team visibility across purchase requests, vendor payments, employee expenses, and recurring subscriptions.

The connected view exposed \$36,000 in duplicate vendor payments. SMG now closes AP in one day and completes their month end close in just 5 days. A singular employee record keeps card access, approvals, and renewal ownership aligned with employee status. When someone leaves, controls update automatically. SMG is putting autonomous finance into practice: routine work keeps moving while the team retains control and has capacity for audits, system improvements, and acquisitions.

"When we rolled out the vendor management capabilities, we quickly discovered duplicate payments and saved ourselves around \$36k. That's on top of the cost saving we made simply by moving off the expensive SAP Concur system onto Paylocity."

Rachel Basham, Finance Systems Manager, SMG



The Challenge

Disconnected Systems Left Spend and Approvals Unchecked

Manual AP work, fragmented card data, and missing contract information made it difficult to control spending and support growth.

Manual AP Work Slowed the Entire Close

Invoices arrived in an AP inbox, then Christa Borota, Staff Accountant, saved them in File Explorer and encoded due dates, approvers, and follow-up dates in filenames. She forwarded invoices for approval by email, entered data into NetSuite, and attached the supporting documents herself. Payment preparation added more manual steps, especially for international wires. SMG also created and routed recurring invoices for roughly 75 to 80 global contractors each month. When approvals or card transactions arrived late, AP stayed open, delaying reconciliations and other closing work.

“The process was very antiquated,” says Christa. “Everything was disconnected and we spent many hours entering data, setting up payments, and chasing late approvals. The heavy workload created a lot of stress, and month-end close processes took a couple of weeks.”

Corporate Card Spend Bypassed Upfront Approval

SMG used SAP Concur alongside separate card arrangements. Employees sometimes put vendor subscriptions on cards intended for travel, without department or finance approval. Rachel could not easily report on spend by employee or vendor, while the team matched transactions against PDF statements. Charges could continue after an employee left because card cancellation required manual action. “We wouldn’t know anything until our card provider contacted us about unpaid bills a few months later,” says Rachel. With card payments and vendor invoices tracked separately, the team lacked a reliable way to spot overlapping charges. Statement cycles also made it difficult to assign card expenses to the correct month, creating a rush to collect receipts and complete entries at month end.

Ineffective Vendor Management Increases Risk

There were also wider issues around vendor management at SMG. “We had no platform for managing and tracking vendors and procurement,” explains Rachel. As a result, the company had no clear picture of which vendors it was currently working with and any upcoming contract renewals. “We had scenarios where contracts would click over for another year without us realizing, even though we didn’t want to renew them,” notes Christa. “And there was a risk that we were actually paying two vendors for the same services and racking up unnecessary costs.”

“Having virtual cards that can be assigned to specific vendors and tracked by subscription and renewal dates has saved us so much money.”

Rachel Basham, Finance Systems Manager



The Solution

One Employee Record Powers Finance Automation

By implementing Paylocity for Finance, SMG gains an integrated platform tied to a singular employee record that connects people to purchasing, cards, expenses, and AP workflows, helping SMG automate routine work while keeping finance in control.

Approving Purchases Before Money Leaves

Guided Procurement gives SMG a visible purchase request and PO process, with vendor ownership, contract details, and renewal reminders in one place. "What is really useful is that when we send an invite to a vendor, they can then upload tax documents and bank details into the system, saving us a job," says Christa. "Overall, Paylocity keeps all our accounts organized and auditable: we can pull the details of every transaction, including the approval chain, who we paid and when."

Vendor-specific virtual cards add control to subscription spending: employees request a card, department and finance teams approve it, and the card is set up for a defined timeframe. AP and card activity sit in the same platform, so finance can review a vendor's spend across payment methods. Employees and executive administrators capture receipts by app or email as transactions happen with automated reminders to help maintain compliance over the month. The success of the AP rollout demonstrated the platform's value, helping department leaders embrace additional capabilities in the solution.

Anchoring Spend Controls to a Singular Employee Record

[Paylocity for Finance](#) anchors spending controls to a singular employee record. When someone leaves, their card is immediately canceled, and their pending approvals and contract renewal reminders automatically move to their manager. Employee context keeps controls and ownership current, without finance having to update each item manually. Teams can also access invoice history and supporting records across time zones. A traceable approval chain shows who acted, when, and where work is waiting, giving finance evidence to resolve delays and prepare for annual audits. Pending bills also support more informed month-end accruals.

Automating Routine Work While Finance Retains Oversight

[AP Automation](#) and the NetSuite integration reduce manual invoice entry and keep transactions moving into the accounting system. Recurring contractor invoices enter the queue automatically; Christa adjusts exceptions, Rachel reviews the total, and the team retains control of payment release. Vendors enter their own tax and banking details, while ACH and international wire payments are managed in the platform. Embedded AI is already part of Christa's day-to-day work: "I'm already using AI. They have that in Paylocity." With reminders running in the background, she can work on audit requests without stopping day-to-day processing. Christa adds: "I wouldn't want to use any other AP system; Paylocity has totally changed how I work."



AP Automation streamlines invoice intake, approvals, and payments and eliminates manual work.



Expense Management helps employees submit receipts throughout the month and gives finance visibility into reimbursements and transactions.



Corporate Cards put department and finance approval ahead of vendor spending, with vendor-specific virtual cards and automatic cancellation at employee departure.



Guided Procurement brings purchase requests, POs, vendor ownership, contracts, and renewal reminders into one process.



The Results

Faster Closing and Stronger Control Support Growth

Using Paylocity for Finance has enabled SMG to uncover duplicate payments, accelerated AP close, and gained capacity to support audits, system changes, and acquisitions with its existing finance team.

\$36,000 in Duplicate Payments Exposed

Combining AP and corporate card data revealed a vendor being paid through a purchase order while still charging a corporate card. “When we rolled out the vendor management capabilities, we quickly discovered duplicate payments and saved ourselves around \$36k. That’s on top of the cost saving we made simply by moving off the expensive SAP Concur system onto Paylocity,” explains Rachel.

AP Closes on Day One

SMG now closes AP in one day and completes their month end close in just 5 days. Previously, month-end closing work extended into mid-month or later. “We’ve knocked 10 to 15 days off the time we need to complete closing,” notes Rachel.

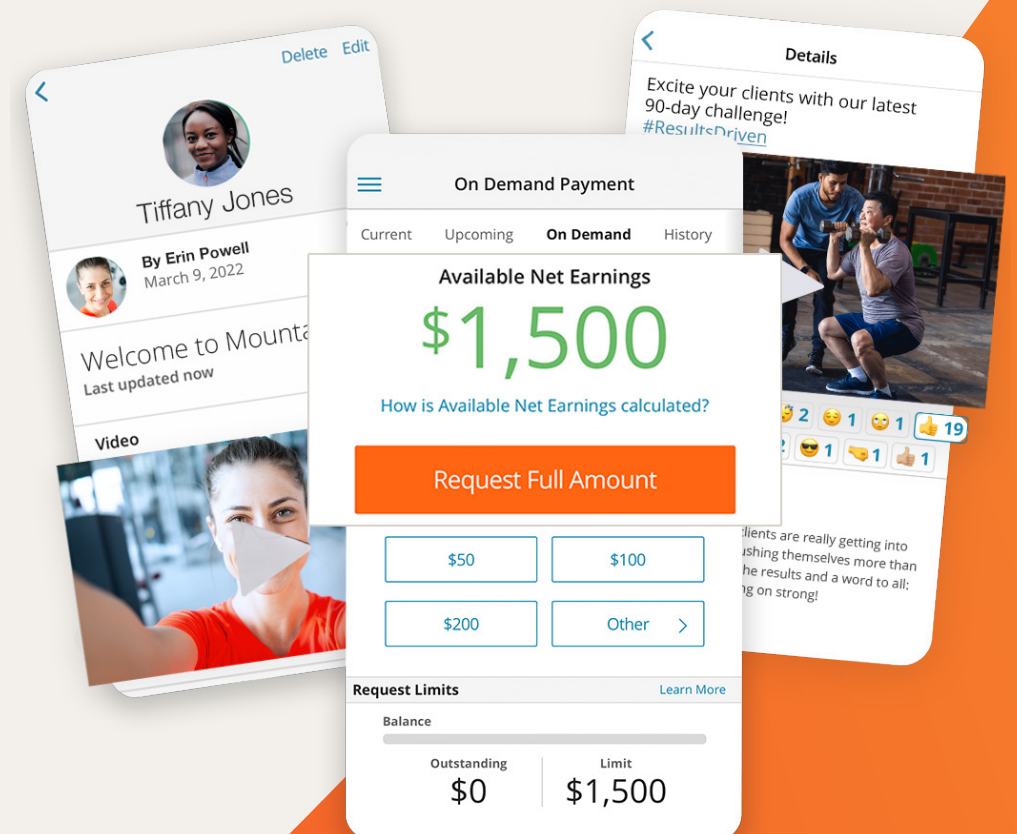
Processing expenses throughout the month and seeing pending invoices have reduced the end-of-month backlog. Finance knows what is pending, outstanding, or paid, supporting more accurate accruals and helping the team present financials it trusts to departments and the board. “Paylocity helps us avoid log jams at the end of the month and makes our work much easier and more enjoyable,” says Rachel. Beyond the efficiency gain, the reduction in manual work helps to cut stress and improve the work experience for the AP team. “Everyone depends on everyone else, and you never want to be the person holding things up,” adds Christa.

Focusing More on Strategic Projects

The time savings mean the team has more capacity for strategic initiatives. For example, SMG is currently undertaking a major upgrade of its tax management system. “We have the bandwidth to test and validate the system to ensure a smooth transition, and work out the impact on reporting and auditing,” says Rachel. “In the past, it would have been more rushed and last-minute.”

Integrating New Acquisitions

Moving to Paylocity has also helped to support SMG’s growth strategy. Following an acquisition, the finance team can simply import the new subsidiary’s vendor information into the platform to start tracking spend. “With a recent acquisition, we actually discovered 30 shared vendors, which allowed us to merge licenses and optimize costs,” concludes Rachel. “In Paylocity, we can integrate future acquisitions quickly and seamlessly, without having to work crazy hours to get things set up.”



“Moving off SAP Concur was a big change for people, but the whole implementation went so smoothly. We knew that setting up Guided Procurement would be challenging because we had no data for some vendors. But Paylocity sent their best, they were awesome to work with.”

Rachel Basham, Finance Systems Manager

