



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.

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.

"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



You had me at
"let's go to
Taco Bell"

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.

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.

About 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

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

Palette AP Automation saves time, lowers costs and improves efficiency for over 2,500 clients worldwide.

To learn more, visit palettesoftware.com

Palette Software is a market-leading vendor of financial process automation for domestic and global corporations, including AP Automation and Purchase to Pay Automation.

Palette solutions automate the connecting and matching of purchase orders, invoices and contracts, on-premise or in the cloud.

Customers experience significant and measurable cost savings, productivity gains and operational excellence. Palette solutions are GDPR compliant and optimize financial management for more than 2,500 customers in 50+ countries.



96% Customer Satisfaction Rating

2,500 Customers Worldwide
250,000+ Users



Schedule an Appointment
to increase the productivity
in your organization

[Schedule an Appointment](#)