Purchase Order Software Checklist™

Use this checklist to decide the right Purchase order software that works with QuickBooks.

PREPARED BY PROCUREDESK

Our Story

- ## What we do?

  We help small to medium-sized companies automate their purchasing and invoicing process so that they get better cash flow visibility.

- ## Purchase Order Software Checklist

  The **Purchase order software checklist** will help you select the right purchase order solution for your purchasing & compliance needs.

- ## What to expect?

  The end result
  Follow this checklist to assess your needs and find the right purchasing solution for your company.

QuickBooks or Another System?

QUICKBOOKS OR AN AUTOMATED PURCHASE ORDER SOFTWARE?

Use this checklist to determine what kind of purchase order software you would need to run your business
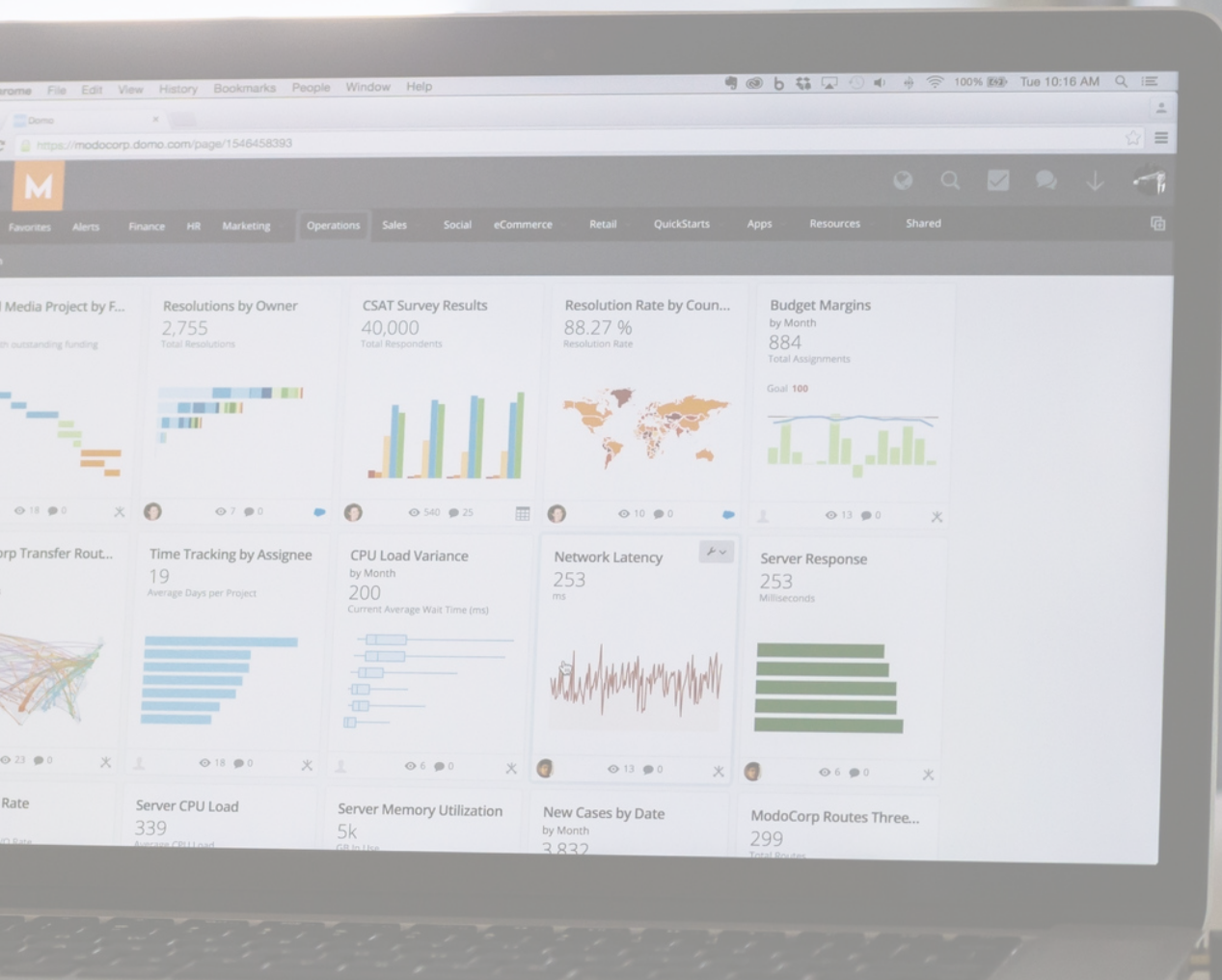
QUICKBOOKS

Use QuickBooks purchase order functionality if:

☐ You create less than 10 purchase orders a month.

☐ You don't need strong cost control.

☐ Only 1-2 employees have access to QuickBooks.

PURCHASE ORDER WORKFLOW SYSTEM LIKE PROCUREDESK

Use an automated purchase order system if:

☐ You are creating more than 10 purchase orders a month.

☐ You have 10+ employees and you need strong cost control.

☐ Your purchase approval process is manual and it takes more than a few hours to approve the purchase.

Purchase Order Software Checklist

PURCHASE ORDER SOFTWARE FOR QUICKBOOKS

Here are the key features for the Purchase order approval process.

- [ ] Catalogs including punch-outs for a better employee shopping experience. For example, integration with Amazon punchout.

- [ ] Support for configurable workflows so that you can route requests for approval based on different attributes.

- [ ] Automatically generate purchase orders and send them to the vendor.

- [ ] Track orders at one single place and ability to create goods receipt notes

Accounts Payable Automation Checklist

ACCOUNTS PAYABLE INVOICE MATCHING AUTOMATION

Here is what you need for an Accounts payable automation solution

- [ ] Automatically create an invoice from emails, electronic invoices, and supplier portal.

- [ ] Extract purchase order information from the invoice.

- [ ] Automatically match the invoice with the purchase order for a 2-way and 3-way match

- [ ] Route invoice for exception approvals.

- [ ] Send invoice to QuickBooks for payment.

- [ ] Synch payment status back from QuickBooks to AP system.

Integration Checklist

QUICKBOOKS INTEGRATION CHECKLIST

If you decide to go with a system that integrates with QuickBooks, then here is the checklist

- ☐ Purchasing system should be able to support automated import of master data like Chart of accounts, Suppliers, Classes, Projects, Terms, etc.

- ☐ System should support 2-way sync for master data like Supplier and Items.

- ☐ Integration for Bills and Purchase orders should be real-time without any manual intervention.

Next Steps

Use this checklist to select the right purchasing system for you.

We have built ProcureDesk to help companies like yours to automate their purchase to pay process.

Want to work with us?
Sign for a demo and see for yourself.

Schedule a Demo