

The purchase order process, on one page

At 12 people you know every purchase. At 40, you don't. Four steps to see purchases before the money's committed.

Foxpedite does this automatically

This cheat sheet is the manual version of the four steps. Foxpedite runs each one for you:

- ✓ **Request:** budget reserved against the right department the moment it's drafted.
- ✓ **Purchase order:** numbered automatically and emailed to the vendor as a PDF.
- ✓ **Approved:** routed by amount; approvers say yes straight from the email.
- ✓ **Invoice matched:** pays only when PO + receipt + invoice agree, then syncs to QuickBooks Online.

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The four steps every growing company ends up rebuilding

1 Request

Someone says what they need, from whom, for how much, and which budget it comes out of.

Document: purchase request

FOXPEDITE: budget reserved at the draft

2 Purchase order

The request becomes a numbered PO: the price and terms you're agreeing to, sent to the vendor.

Document: PO

FOXPEDITE: auto-numbered PDF PO to the vendor

3 Approved

The right person says yes *before* the money is committed. Who that is depends on the amount.

Document: approval record

FOXPEDITE: routed by amount, approve from email

4 Invoice matched

Before paying, check: what we ordered (PO) = what arrived (receipt) = what we're billed (invoice).

Documents: receipt + invoice

FOXPEDITE: pays only on a 3-way match

PO vs invoice vs receipt, in one table

Document	Who creates it	When	What it proves
Purchase order	You (the buyer)	Before you buy	What you agreed to buy, at what price, and who approved it
Receipt	You (whoever receives)	When goods or services arrive	What actually showed up, and how much of it
Invoice	The vendor	After delivery (usually)	What the vendor says you owe

Do you need POs yet? Quick test

- ☐ More than one person can commit company money.
- ☐ You've asked "who approved this?" in the last month.
- ☐ You have a second location, site, or department budget.
- ☐ Invoices arrive that nobody remembers ordering.

Two or more ticks: you're past "just text me before you buy it." In Foxpedite, these thresholds become routing rules.

EXAMPLE SCENARIO (ILLUSTRATIVE): DENTAL GROUP

A second office's manager orders a \$3,800 sterilizer online. The owner sees it on the card statement 26 days later. In Foxpedite it would have reserved budget and hit the approver's inbox the day it was drafted.

Starter thresholds (adjust to taste)

Amount	Who approves
Under \$500	No PO needed; card or petty cash, receipt required
\$500 – \$2,500	Department / location manager
\$2,500 – \$10,000	Manager + finance (controller or bookkeeper)
Over \$10,000	Owner / CEO, plus 2 quotes

The case for a purchase approval process

A one-page memo to send to your owner or CEO. **Edit every highlighted field.** The editable Word version is included in this download.

To: [Owner / CEO name] From: [Your name, role] Date: [Date]

Re: Seeing purchases before they're committed, without you approving every one

The problem (in our numbers)

- We have [#] people who can order from vendors, across [#] locations/departments.
- In the last [90 days] we received [#] invoices with no request or approval behind them, totaling about [\$].
- Approvals today happen by [text / email / hallway]. When [name] is out, orders [wait / go through unapproved].
- We usually find budget overruns [at month-end / at the bill], after the money is spent.

Why it matters (outside numbers, not ours)

- The average cost to process one invoice is \$9.40; top-performing teams run about \$2.78 (Ardent Partners, *AP Metrics that Matter* 2025).
- At average organizations, 22% of invoices are flagged as exceptions vs 9% at top performers (Ardent Partners 2025).
- In organizations under 100 employees, billing schemes appeared in 31% of occupational fraud cases; lack of internal controls was the primary weakness in 32% of all cases (ACFE, *Occupational Fraud* 2024).

What I'm proposing

1. **Request before ordering** anything over [\$500], with the budget it comes from.
2. **Approval by amount:** manager up to [\$2,500]; manager + finance up to [\$10,000]; you above that. You stop approving the small stuff.
3. **Match before paying:** PO = receipt = invoice, or the bill waits.
4. **Trial Foxpedite for 14 days** (every feature, no card required) with one department, then decide.

What I need from you

Approve the thresholds above (or change them), name a backup approver for when you're out, and give me [2 weeks] to run it with [one department / one location]. I'll report back with what we caught.

Cost to try: \$0 for the 14-day trial; \$390/month (Regular, 10 users) or \$740/month (Advanced, 20 users, with approval workflows and QuickBooks Online sync) if we keep it. Time to set up: [estimate].

Stop doing this by hand

If the memo gets a yes, you don't have to build the process in a spreadsheet first.

- **Draft-Stage Budget Lock:** the moment someone drafts a purchase, Foxpedite reserves it against the budget. You see overspend at the request, not at month-end.
- **Approve from the email,** routed by amount and department, so the owner only sees what's above their line.
- **PO + receipt + invoice matched** before anything is paid, then synced to QuickBooks Online.

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foxpedite.com/register · Trial includes every Advanced feature. Approval workflows, approve-from-email, QuickBooks Online sync and AI document scanning are on Advanced (\$740/mo, 20 users incl.); Regular (\$390/mo, 10 users) covers POs, budgets and 3-way match. +\$39/extra user · prices as of Oct 2026

Sources (accessed Oct 18, 2026): Ardent Partners 2025 via Thomson Reuters <https://europe.thomsonreuters.com/blog/3-ap-metrics-that-matter> · ACFE 2024 <https://www.ivey.uwo.ca/media/kijij5cy/2024-report-to-the-nations.pdf>. Stats describe the industry, not Foxpedite customers.