

# QuickBooks Online purchase orders: set them up right, and know where they stop

A setup checklist for Plus and Advanced, a plain map of what QuickBooks Online doesn't do before a purchase is made, and how Foxpedite adds approvals on top.

For controllers, bookkeepers &amp; office managers

QuickBooks Online (US)

Checked against Intuit help pages, Oct 18 2026

## Foxpedite does this automatically

This checklist is the manual version: QuickBooks settings plus the controls you'd otherwise run by hand. Foxpedite adds them on top of QuickBooks Online:

- ✓ **Budget checked at the draft (Gate 1).** The moment someone drafts a purchase, Foxpedite reserves it against the job or department budget. QuickBooks only compares budget to actual after bills post.
- ✓ **Approvals routed by amount, department and category (Gate 2),** with escalation, and approvers say yes straight from the email. No fitting every rule into one QuickBooks workflow.
- ✓ **Invoice pays only when PO + receipt + invoice match (Gate 3).** The receipt is its own record, so a changed price gets held, not quietly overwritten.
- ✓ **Approved POs, vendors and bills sync to QuickBooks Online.** QuickBooks stays your books; Foxpedite adds the approvals on top.

**Try it free for 14 days: [foxpedite.com/register](https://foxpedite.com/register) →**

Every Advanced feature, no credit card. 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.

## HOW TO USE THIS

Work top to bottom with QuickBooks open in another tab. Part 1 is the QuickBooks setup you need either way. Part 2 shows where QuickBooks stops, and the blue notes mark each step Foxpedite runs for you.

## Part 1 - Setup checklist

### A. Confirm your plan can do it

- ☐ **Check your edition.** Purchase orders are only in QuickBooks Online **Plus** and **Advanced**. Simple Start and Essentials can't create purchase orders.<sup>[1]</sup>  
Settings ⚙ → Subscriptions and billing. List price as of Oct 2026: Plus \$140/mo, Advanced \$340/mo (since Aug 1, 2026).<sup>[8]</sup>

- ☐ **Decide who may create POs.** Write down the names. If it's "everyone," Part 2 matters more for you.

### B. Turn purchase orders on

- ☐ **Switch on "Use purchase orders."**  
Settings ⚙ → Account and settings → Expenses → Purchase orders → Edit → turn on → Save → Done.<sup>[1]</sup>
- ☐ **Add up to three custom fields** you'll actually filter on, e.g. *Job / Project, Department, Requested by*.<sup>[1]</sup>  
Same screen. Three is the limit, so pick fields you'll report on.
- ☐ **Write a default message to vendors** (e.g. "Please quote this PO number on your invoice or it will be returned.").<sup>[1]</sup>

- ☐ **Turn on the items table for bills and expenses** so PO lines carry through to the bill.  
Account and settings → Expenses → Bills and expenses → "Show Items table on expense and purchase forms." Turn on the billable options if you re-bill jobs.<sup>[2]</sup>

C. Get your items ready

- ☐ **Mark items as purchasable.** Only products and services marked as purchased from a vendor show up on a PO.<sup>[1]</sup>  
Sales → Products and services → edit item → tick "I purchase this product/service from a vendor."
- ☐ **Clean up vendor records.** Merge duplicate vendor names (e.g. "ABC Supply" and "ABC Supply Co.") before you start. Duplicates here cause duplicates later.

D. Create, send, and close POs

- ☐ **Create a test PO.** + Create → Purchase order → vendor → Ship to (job site or customer, if direct ship) → date → item lines → Save and send.<sup>[1]</sup>  
**FOXPEDITE AUTOMATES THIS** Anyone can draft a request; Foxpedite numbers the PO, reserves the budget at the draft and emails the vendor a PDF once it's approved.
- ☐ **Know the status rules.** A saved PO starts as *Open*. Unsent POs can be sent later from Expense transactions → Send.<sup>[1]</sup>
- ☐ **Convert the PO into the bill.** + Create → Bill → pick the vendor → click *Add* on the open PO in the side panel.<sup>[2]</sup>
- ☐ **Handle partial deliveries.** Edit the quantity/amount on each line to what arrived. Several bills can link to one PO; QuickBooks closes it when all quantities are recorded.<sup>[2]</sup>  
**FOXPEDITE AUTOMATES THIS** Partial deliveries are logged as receipts against the PO, and each invoice is matched to PO + receipt before the bill syncs to QuickBooks Online.
- ☐ **Know how to reopen.** Unlinking a PO leaves it *Closed*. Open the PO and change its status back to *Open*.<sup>[2]</sup>

E. Reporting and hygiene

- ☐ **Bookmark the open-PO reports.** Reports → Standard reports → *Open Purchase Order List* and *Open Purchase Order Detail*.<sup>[1]</sup> Review them weekly and at every month-end.
- ☐ **Turn on the duplicate bill-number warning.** Settings ⚙ → Account and settings → Advanced → Other preferences → warn when a bill number has already been used for that vendor.<sup>[5]</sup>  
It warns on a repeated bill number for the same vendor. It won't catch the same invoice entered with a typo or under a second vendor name.  
**FOXPEDITE AUTOMATES THIS** An invoice pays only against an approved PO and a receipt. A second invoice for a fully billed PO has nothing left to match, so it's held.
- ☐ **Advanced only: set up the PO approval workflow.** Advanced has multi-condition approval templates that cover purchase orders; a PO created by a non-admin is only sent once approved.<sup>[3]</sup>  
Approver groups take up to five approvers each.<sup>[3]</sup> Intuit community support says only one PO approval workflow can be active at a time.<sup>[4]</sup>  
**FOXPEDITE AUTOMATES THIS** Build the routing in Foxpedite's visual workflow builder (by amount, department and category, with escalation) and approvers approve from the email.

Part 2 - Where QuickBooks Online stops

QuickBooks is an accounting system. It records the purchase well. What it does less of is control the purchase *before* it happens. Here's the plan-by-plan picture, as of Oct 2026.

| Capability                     | Simple Start / Essentials | Plus | Advanced |
|--------------------------------|---------------------------|------|----------|
| Create & email purchase orders | No <sup>[1]</sup>         | Yes  | Yes      |

|                                                          |                                |                                           |                                                                             |
|----------------------------------------------------------|--------------------------------|-------------------------------------------|-----------------------------------------------------------------------------|
| Link PO to bill, partial receipts, auto-close            | No                             | Yes <sup>[2]</sup>                        | Yes                                                                         |
| PO approval before it goes out                           | No                             | Not native (roles, email, or add-ons)     | Limited: workflow templates; one active PO approval workflow <sup>[4]</sup> |
| Up to 3 custom fields on POs                             | -                              | Yes                                       | Yes                                                                         |
| Budget checked when a PO is <i>drafted</i>               | -                              | Not described in Intuit's PO help         | Not described in Intuit's PO help                                           |
| Separate receipt record for PO + receipt + invoice match | -                              | Not described (PO links straight to bill) | Not described                                                               |
| Import POs from a spreadsheet                            | -                              | Not in native import list <sup>[7]</sup>  | Not in native import list                                                   |
| Import bills from a spreadsheet                          | Essentials: yes <sup>[6]</sup> | Yes                                       | Yes                                                                         |

"Not described" means we found no such feature in the Intuit PO help articles cited here. Test it in your own file before you rely on this table.

## What that looks like in real life

### EXAMPLE SCENARIO (ILLUSTRATIVE)

A 40-person specialty contractor runs QuickBooks Online Plus. A project manager emails a supplier for \$4,300 of material for a job that is already at budget. The PO gets keyed into QuickBooks after the order went out, if at all. The bill arrives three weeks later. The controller learns about the overrun at month-end, from the bill, when the money is already spent.

## Your options for the gaps (pick one on purpose)

### 1 Manual rule

"Over \$X, email the owner before ordering." Free. Works until the owner travels, or until there are 20+ people buying.

### 2 Approval add-on

Bolt-on approval apps for QuickBooks. Good for routing; most don't hold budgets or match receipts.

### 3 Foxpedite + QuickBooks Online

Requests, budgets, approvals and matching happen in Foxpedite before the bill. Matched bills sync to QuickBooks Online (Advanced plan), so QuickBooks stays your books.

## Quick self-score

- ☐ More than ~20 people can commit company money.
- ☐ You've found a bill with no PO in the last 90 days.
- ☐ Budget overruns show up at month-end, not at the request.
- ☐ Approvals live in someone's inbox or text messages.
- ☐ You need a second approval rule (by department or job) and Advanced allows one active PO workflow.

Two or more ticks: the setup in Part 1 is necessary but not enough on its own. That's the gap Foxpedite fills.

## Stop doing this by hand

Built for the company still running purchasing on spreadsheets, email and QuickBooks. Keep QuickBooks as your books; add the three gates in front of it.

- **Budget reserved at the draft.** The moment someone drafts a purchase, Foxpedite reserves it against the department or project budget. You see overspend at the request, not at month-end.
- **Approvals routed by amount, department and category,** approvable straight from the email, with an audit trail.
- **Invoice pays only when PO + receipt + invoice match,** then syncs to QuickBooks Online.

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### Sources (accessed Oct 18, 2026)

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- [5] QuickBooks Community (Intuit staff reply), duplicate bill warning: <https://quickbooks.intuit.com/community/reports-and-accounting-5/how-can-i-avoid-accidentally-paying-invoices-twice-56358>
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