

The SMB Procurement Starter Kit

Every free template from the series in one place, in the order you'd actually use them, plus an ROI calculator that uses US labor rates. For the company still running purchasing on spreadsheets, email and QuickBooks.

Foxpedite does this automatically

These 13 templates are the manual version of one cycle. Foxpedite runs the whole cycle in one place:

- ✓ **Request + budget check (Gate 1):** the moment someone drafts a purchase, Foxpedite reserves it against the department or project budget.
- ✓ **Approve (Gate 2):** routed by amount, department and category, approved straight from the email, with an audit trail.
- ✓ **PO, receive, match and pay (Gate 3):** POs numbered and emailed automatically; receipts logged against the PO; invoices pay only when PO + receipt + invoice match.
- ✓ **Books:** approved POs, vendors and matched bills sync to QuickBooks Online (Advanced plan).

Try it free for 14 days: 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.

The cycle these templates cover

Request someone needs to buy	Budget check is there money for it?	Approve right person, right \$	PO sent to vendor	Receive it arrived	Match & pay PO + receipt + invoice
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Each template below covers one part of this cycle by hand; the blue line says what Foxpedite does instead. Foxpedite's version of the cycle is three gates: **Gate 1** budget reserved at draft, **Gate 2** approval routed by amount and department, **Gate 3** invoice pays only when PO + receipt + invoice match.

What's in the kit

#	Template and what it's for	Stage	Download page
1	QuickBooks PO Setup & Limits Checklist (PDF) Set up POs in QBO and see where the plan limits stop you Foxpedite: budget check at draft + approvals on top of QBO	Set up	foxpedite.com/templates/quickbooks-po-setup-checklist
2	PO Process Cheat Sheet + 'Case for Your Boss' one-pager Explain the PO process; pitch it to the owner Foxpedite: all four steps run on their own	Set up	foxpedite.com/templates/po-process-cheat-sheet
3	PO Template Pack (Excel + Google Sheets, auto-numbering, QBO column map) Run POs in Excel/Sheets with auto-numbering Foxpedite: auto PO numbers, PDF POs, no log to keep	Set up	foxpedite.com/templates/po-template-pack
4	Duplicate Payment Audit Checklist (15-minute self-check) 15-minute check for invoices paid twice Foxpedite: invoice pays only on a 3-way match	Pay	foxpedite.com/templates/duplicate-payment-audit-checklist
5	Approval Matrix Template (dollar thresholds × department × category) Decide who approves what, by \$ and department Foxpedite: rules in the visual workflow builder	Control	foxpedite.com/templates/approval-matrix
6	Department Budget Tracker (committed vs actual vs remaining) Track committed vs actual vs remaining budget Foxpedite: committed spend updates itself	Control	foxpedite.com/templates/department-budget-tracker
7	Year-End Close Checklist for SMB Purchasing (GRNI, open POs, accruals, 1099 prep) Close the year: open POs, GRNI, accruals, 1099 prep Foxpedite: live open-PO list and GRNI report	Close	foxpedite.com/templates/year-end-close-checklist
8	Vendor Bank-Change Verification Protocol (1-page) Stop bank-change and fake-invoice fraud Foxpedite: bank details on the vendor record, audit trail	Pay	foxpedite.com/templates/vendor-bank-change-protocol
9	AI Invoice Extraction Test Kit (sample invoices + scoring sheet) Test any AI/OCR tool on 10 sample invoices Foxpedite: AI document scanning + Gate 3 match	Pay	foxpedite.com/templates/ai-invoice-extraction-test-kit
10	One-Page Purchasing Policy Template (20–200 employees) Write your first purchasing policy Foxpedite: the policy becomes the way to buy	Set up	foxpedite.com/templates/purchasing-policy-template
11	Procurement Software Cost Calculator (headcount → public pricing compared)	Choose	foxpedite.com/templates/procurement-

	Compare published software prices at your headcount Foxpedite: published price; approvals + QBO sync on Advanced	tools	software-cost-calculator
12	Vendor Scorecard Template (A-F grading) Grade vendors A-F on 4 criteria Foxpedite: A-F grades from real receipts and matches	Vendors	foxpedite.com/templates/vendor-scorecard
13	SMB Procurement Starter Kit (bundle of all templates + SMB ROI calculator) Estimate time and cost of your PO process (this kit) Foxpedite: the whole cycle in one place	Choose tools	foxpedite.com/templates/smb-procurement-starter-kit

Where to start (pick your situation)

If this sounds like you...	Start with
"Anyone can buy anything; I find out from the bank statement."	#5 Approval Matrix → #10 Purchasing Policy → #3 PO Template Pack
"We're on QuickBooks and not sure what it can do with POs."	#1 QuickBooks PO Checklist → #3 PO Template Pack
"Budget reports look fine until invoices arrive."	#6 Department Budget Tracker (committed vs actual)
"We're closing the books for the year."	#7 Year-End Close Checklist → #4 Duplicate Payment Audit
"I'm worried about fake invoices and bank-change emails."	#8 Bank-Change Protocol → #4 Duplicate Payment Audit
"We're shopping for software."	#11 Cost Calculator → #9 AI Extraction Test Kit → the ROI calculator below
"Vendor prices keep creeping up."	#12 Vendor Scorecard

The ROI calculator (included: [Foxpedite_SMB_Procurement_ROI_Calculator.xlsx](#))

It estimates the time your PO process takes and what that time costs, then sets it against software cost. Every default is either sourced or labeled:

Input	Default	Where it comes from
Wages per hour	\$25.22	BLS Employer Costs for Employee Compensation (ECEC), June 2026, private industry, office & administrative support
Benefits per hour	\$11.51	Same BLS ECEC series, June 2026
Employer cost per hour	\$36.73/hr	Wages + benefits (BLS ECEC total compensation, office & admin support). Editable. Excludes overhead.
Minutes per PO today / with a tool	42 / 6	Foxpedite internal estimates (site ROI calculator assumptions), not independent benchmarks. Time 5 of your own POs and replace them.
Software cost	Advanced \$740	Foxpedite list price, Oct 2026. Advanced is the plan with approval workflows and QuickBooks Online sync.

Example scenario (illustrative, using the defaults): 120 POs/month × (42 – 6) min = 72 hours/month. At \$36.73/hr that's about \$2,645/month of time, against \$935/month for Advanced with 25 users. That is time freed for other work, not a payroll cut, and the 42 and 6 minute figures are Foxpedite's own estimates. Put your own numbers in.

What the calculator leaves out on purpose: overspend prevented, duplicate payments avoided and audit time. They're real, but we can't estimate them honestly for your company without your data.

Stop doing this by hand

Templates work until there are too many of them to keep in sync. Foxpedite runs the whole cycle in one place: budgets reserved at draft, approvals from email, POs, receiving, and invoices that pay only on a three-way match. Approval workflows and QuickBooks Online sync are on the Advanced plan, and the trial includes all of it.

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Sources (verified Oct 18, 2026): BLS, Employer Costs for Employee Compensation, June 2026 (released Sep 9, 2026), office & administrative support - https://www.bls.gov/news.release/archives/eccec_09092026.htm · BLS, The Economics Daily, compensation costs for private industry workers, June 2026 - <https://www.bls.gov/opub/ted/2026/compensation-costs-for-private-industry-workers-averaged-46-89-per-hour-worked-in-june-2026.htm> · Ardent Partners, AP Metrics that Matter 2025, via Thomson Reuters - <https://europe.thomsonreuters.com/blog/3-ap-metrics-that-matter>.