

# SaaS Purchase Order Management Checklist

## Before the Purchase Order

- ☐ Develop a standardized purchase order request form that captures all necessary details, including vendor information, buyer information, and product specifications.
- ☐ Establish a clear internal approval workflow for all purchase order requests.
- ☐ Train your sales and finance teams on the proper use of the purchase order request form and the approval process.

## During the Purchase Order Process

- ☐ Verify all information on the received purchase order against your quote, including the product name, license quantity, pricing, and subscription terms.
- ☐ Confirm the unique purchase order number is present and correct.
- ☐ Enter the purchase order into your centralized management system to begin tracking the transaction.

## Post-Purchase Order & Invoicing

- ☐ Generate an invoice that explicitly references the purchase order number.
- ☐ Send the invoice to the designated accounts payable contact at the client's company.
- ☐ Set up automated payment reminders for the invoice due date to ensure timely payment.

- ☐ Monitor the status of the purchase order in your system until the payment is received and the transaction is marked as complete.

### **Ongoing Management & Auditing**

- ☐ Regularly reconcile purchase orders with received payments in your accounting software.
- ☐ Conduct periodic audits of your purchase order records to identify any discrepancies or areas for process improvement.
- ☐ Review your purchase order management system and templates annually to ensure they align with your business growth and evolving client needs.