MARKETPLACE APP · IT-SERVICES

Procurement

Purchase requisitions, approvals, and purchase order management.

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MODEL	TIER	CAPABILITIES	INTELLIGENCE
Licensed · opt-in	Suite	33+	AI-powered

OVERVIEW

Procurement streamlines the purchasing process with requisition workflows, multi-level approvals, purchase order generation, and spend tracking. Features include budget controls, vendor management, and receipt matching.

WHY TEAMS CHOOSE IT

- Let employees order from a self-service catalog that blends warehouse stock with live vendor catalogs, gated by practice-level eligibility and per-station order limits.
- Route requisitions through multi-level approval workflows — role, budget-owner, department-head, or manager approvers — and auto-approve anything below a configurable threshold.
- Convert approved requisitions into per-vendor purchase orders, then issue them to vendors as emailed PDFs.
- Receive purchase orders with per-unit serial capture straight into inventory and Asset Pro, and fulfill warehouse orders with carrier tracking.
- Reconcile vendor invoices against POs and receipts with tolerance-based three-way matching and a variance-approval workflow.
- Catch duplicate invoices, spend anomalies, and vendor-consolidation opportunities with AI, and act on them from an autonomous console.

CAPABILITIES

Self-Service Ordering & Fulfillment

- ✓ Employee catalog blending warehouse stock and live vendor catalogs
- ✓ Per-item minimum and maximum order quantities in the cart
- ✓ Practice-level item eligibility, hidden and hard-blocked at checkout
- ✓ Station-based ordering with per-order and per-period item limits
- ✓ Warehouse fulfillment with carrier tracking and per-unit serial capture
- ✓ Auto-generate per-vendor purchase orders when an order is approved

Requisitions & Multi-Level Approvals

- ✓ Draft requisitions with line items, cost center, and justification
- ✓ Auto-approval below a configurable USD threshold
- ✓ Require 3 vendor quotes above a configurable threshold
- ✓ Approvers by role, specific user, budget owner, department head, or requester's manager
- ✓ Route workflows by amount, department, or item category
- ✓ Require-all or minimum-approvers per level, with escalation to a backup approver
- ✓ Out-of-office delegation with date range, amount cap, and department/category scope

AI Spend Intelligence & Budget Controls

- ✓ Budgets by cost center, department, and fiscal year
- ✓ Live allocated / spent / committed / reserved tracking with utilization %
- ✓ Funds reserved on submit, committed on approval, with optional hard-stop on over-budget orders
- ✓ Configurable budget alert thresholds plus burn-rate detection
- ✓ Duplicate-invoice, spend-anomaly, and vendor-consolidation detection
- ✓ Act on AI insights from an autonomous console with inline approve/reject

Purchase Orders

- ✓ Convert an approved requisition into a purchase order
- ✓ Full draft → issued → received → closed PO lifecycle
- ✓ Issue POs to vendors by email with a generated PDF
- ✓ Partial receipts with serial capture into inventory and Asset Pro

Invoices, Matching & Payments

- ✓ Invoice line items linked to a purchase order
- ✓ Tolerance-based three-way matching (invoice ↔ PO ↔ receipt)
- ✓ Variance-approval workflow for out-of-tolerance invoices
- ✓ Overdue aging report (current / 1-30 / 31-60 / 61-90 / 90+ days)
- ✓ Payment recording, batch processing, and CSV export

Vendor Management & Catalog Integrations

- ✓ Vendor directory shared across Procurement, Asset Pro, and Contracts
- ✓ Vendor type classification and 1–5 star performance ratings
- ✓ Staples, Grainger, and manual catalog providers
- ✓ Automatic vendor catalog sync
- ✓ Vendor spend and order-volume analysis

Limits & Specs

Default auto-approval threshold	**$500 (admin-configurable)**
Three-quotes requirement threshold	**$5,000 (admin-configurable)**
Budget alert thresholds	**Up to 3 per budget (default 75% / 90% / 100%)**
Supported currencies	**USD, EUR, GBP, CAD, AUD**

USE CASES

- **Frontline supply ordering**
  Field staff order from a station catalog where practice-level eligibility and per-station order limits are enforced, and the warehouse team picks, packs, and ships with carrier tracking and serial capture.
- **Capital equipment purchase**
  A buyer raises a requisition above the three-quotes threshold, it clears multi-level approval, the PO is issued to the vendor, and received units flow into inventory and Asset Pro with serial numbers.
- **Department budget control**
  Finance sets cost-center budgets; submissions reserve funds, an optional hard-stop blocks over-budget orders, and threshold and burn-rate alerts fire before a budget is exhausted.
- **Accounts-payable matching**
  AP matches vendor invoices to POs and receipts, approves variances that fall within tolerance, works the overdue aging report, and clears payments in batches.
- **Spend governance**
  A procurement lead reviews AI spend intelligence — potential duplicate invoices, monthly spend anomalies, and categories spread across too many vendors — and acts on approvals from the AI console.

PRICING & LICENSING

Pricing	**Requires a license (premium tier)**
License	**Required (opt-in per business)**
Tier	**Suite**

Pricing is tailored to your organization — **talk to sales for pricing & a live demo**. Final commercial terms per your agreement.

FAQ

Can employees order supplies themselves?
Yes. When supply ordering is enabled, employees browse a self-service catalog that blends internal warehouse stock with live vendor catalogs, add items to a cart, and submit — with practice-level eligibility and per-station limits enforced. Warehouse items go to a fulfillment queue and vendor items auto-generate per-vendor POs on approval.

How are approvals configured?
Admins build multi-level workflows with ordered levels and approver types (role, specific users, budget owner, department head, or the requester's manager). Workflows route by amount, department, or item category, support require-all or minimum-approvers per level with escalation to a backup approver, and allow out-of-office delegation with an amount cap. Requisitions below the configurable threshold auto-approve.

Does it do three-way matching?
Yes. When an approved invoice is linked to a PO, the app runs a three-way match against the PO and receipt, flags variances outside the configured tolerance, and routes discrepancies through a variance-approval workflow.

Does it integrate with accounting or ERP systems?
Not directly — there is no built-in QuickBooks/ERP general-ledger sync today. Vendor integrations are catalog providers (Staples, Grainger, and a manual provider), and requisitions, POs, invoices, payments, and budgets can all be exported to CSV.

What AI does it include?
An Ask AI agent creates and tracks purchase requests, and a spend-intelligence engine surfaces duplicate invoices, spend anomalies, and vendor-consolidation recommendations — which admins can act on from an autonomous AI console with inline approve/reject actions. Autonomous actions such as auto-approving low-value requisitions are gated behind default-off capability toggles and the platform's progressive-trust safety layer.

How is Procurement different from Supplier Hub and Asset Pro?
They're separate apps that share a common vendor directory. Procurement runs the buying process end to end — requisitions, multi-level approvals, purchase orders, three-way invoice matching, payments, and budgets. Supplier Hub (formerly Source) manages the vendor relationship itself — supplier profiles, performance scorecards, and RFQ/RFP workflows. Asset Pro is where received serialized units land as tracked assets: receiving a PO line with serial capture creates the corresponding Asset Pro asset.

Can we stop spending that goes over budget?
Yes. Budgets are set by cost center, department, and fiscal year. Funds are reserved when a requisition is submitted and committed on approval, and a budget can enable a hard stop that blocks any order it can't accommodate. You can also configure up to three alert thresholds per budget (default 75% / 90% / 100%) plus burn-rate detection so alerts fire before a budget is exhausted.

What are the default approval thresholds, and can we change them?
Requisitions below the auto-approval threshold (default $500) clear without an approver; purchases above the three-quotes threshold (default $5,000) require vendor quotes in the justification. Both thresholds are admin-configurable per business, alongside the multi-level approval workflows that route everything in between by amount, department, or item category.