

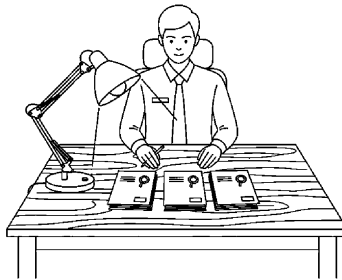
HIGH-VOLUME

WORKSHEET 1 OF 9

# PR-to-PO Checkpoint Log

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*Daily tracking of every purchase request raised, confirming it moved to a confirmed PO before any delivery begins.*



Complementary worksheet for  
*Procurement Best Practices*  
by Ibrahim Anwar

## What This Is For

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This log tracks the gap between a purchase request being raised and a vendor-confirmed Purchase Order existing in your files. That gap is where unprotected transactions live: goods ordered verbally, deliveries arranged by WhatsApp, invoices arriving for purchases no document controls. The log makes the gap visible by requiring one row per purchase request, every day, before anything ships.

The symptom that brings operators to this sheet is usually an invoice dispute they cannot resolve cleanly, or a payment their finance team approved for goods whose quantity or price nobody can verify from a document. Both are downstream effects of the same upstream failure: something was ordered without a PO, or a PO was sent but never confirmed in writing by the vendor. Run this log daily and the gap closes before it becomes a dispute.

## Benefits

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What you get when you actually run this worksheet on a real situation:

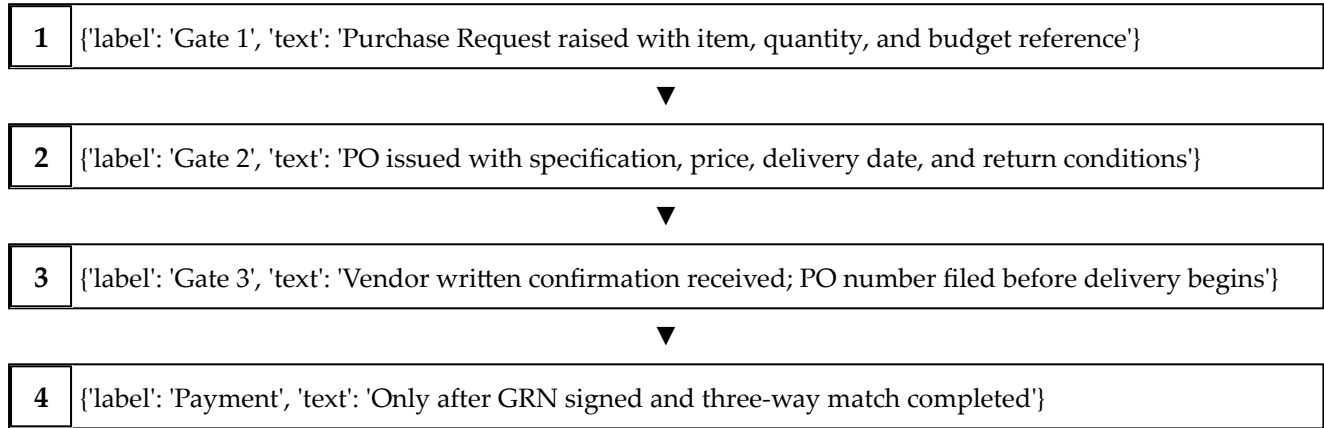
- Shows your PO compliance rate in real time: the percentage of purchase requests that have a confirmed PO before goods move.
- Catches unprotected transactions the day they happen, not when the invoice arrives 30 days later with no document to match it against.
- Creates the audit trail that three-way matching depends on: no row in this log should ever reach payment without a PO number and vendor confirmation.
- Surfaces which staff members or departments routinely initiate purchases without a PO, so the coaching conversation is data-driven rather than anecdotal.
- Builds the weekly PO archive automatically: every row eventually resolves to a filed PO or a cancelled request, both worth keeping.

# Framework To Use

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## — Transaction Gate Model

*Every purchase request passes three gates before payment is authorized. A request that skips any gate is an un-protected transaction.*



## How To Use

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Follow these steps in order. Each one builds on the previous.

- 1** At the end of each working day, open this log and add one row for every purchase request raised today, whether formal or informal.
- 2** Fill in the PR reference (a sequential number you assign), the item or category, and the vendor name or 'TBD' if no vendor is selected yet.
- 3** In the PO Number column: enter the PO number once the PO has been issued. Leave blank if no PO exists yet — that blank is an open risk item.
- 4** In the Vendor Confirmation column: mark Y only when written confirmation of the PO has been received from the vendor, not when you sent the PO. Mark N or leave blank until confirmation arrives.
- 5** Before the end of each day: count rows where PO Number is blank and any delivery has been arranged. Each of those is an unprotected transaction requiring immediate action.
- 6** At the end of each week: count rows where Vendor Confirmation is still N. Any row older than two working days without confirmation needs a follow-up call or email today.
- 7** File the completed weekly log. When an invoice arrives, cross-reference its PO number to the log to confirm the purchase was properly authorized.

## Example Use

*A small fabrication shop in Bekasi processes around 15 purchase requests per week. The owner starts the log after an invoice dispute with a steel supplier whose delivery was arranged by phone with no PO.*

Week one, Monday: three purchase requests logged. PR-001 for angle iron (\$340 value) has a PO issued and vendor confirmation received by Tuesday morning. PR-002 for welding rods (\$87 value) has a PO but no vendor confirmation yet. PR-003 for equipment rental (\$520 value) has neither PO nor vendor.

By Wednesday, PR-003 is still PO-less. The owner calls the rental vendor and discovers the vendor already dispatched the equipment assuming the order was verbal and binding. No PO exists. The owner issues the PO retroactively, the vendor confirms in writing, and the GRN is signed on delivery. Lesson: the gap was caught before payment, but the order was still unprotected for three days.

By end of week one: 12 of 15 requests reached full PO-confirmed status before delivery. Three did not. PO compliance rate: 80%. The owner sets a target of 95% by week four.

Week four: 14 of 15 reached confirmed status before delivery. The one exception was a \$45 stationery purchase made through petty cash, which the owner decides to exclude from the log threshold (purchases below \$50 can be direct cash purchases from an AVL vendor). Compliance rate on tracked transactions: 100%.



## Reflection Prompts

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*After filling in the worksheet on the previous page, work through these.*

1. Any row where 'Vendor Confirmation' is N and a delivery has already been arranged: this is an unprotected transaction. Stop the delivery or send the PO now and get written confirmation before goods move.
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2. Count the ratio of PRs without a matching PO number this week. That ratio is your PO compliance rate. A rate below 100% means payments are being made without a controlling document.
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# Tips and Traps

## TIPS

- Run the log daily, not weekly. A week-old unprotected transaction is harder to fix than a same-day one.
- Assign PR reference numbers sequentially, never reuse them. Gaps in the sequence are audit flags worth explaining.
- Set a minimum value threshold below which direct petty cash purchase from an AVL vendor is acceptable. Document that threshold and stick to it, so the log stays focused on transactions that actually need document control.
- When a vendor confirms a PO by WhatsApp, screenshot it and save it in the PO archive folder with the PO number in the filename. A WhatsApp confirmation that cannot be found six months later is no protection.

## TRAPS

- Marking Vendor Confirmation as Y because you called the vendor and they said 'yes' on the phone. That is not written confirmation. Written means a document, email, or message that includes the PO number.
- Logging only the purchases you know about. If another staff member arranged a delivery without telling you, it still needs a row. The log is only complete if every delivery can be traced to a row.
- Treating this as a paperwork exercise rather than a risk control. The log's value is in the daily review of open rows, not in filling it out.

# Appendixes

## Appendix A – PO Compliance Rate Formula and Weekly Tracking

PO Compliance Rate (weekly) =  
(Rows with PO Number confirmed before delivery) / (Total rows for the week) x 100

Target thresholds:

Week 1-4 (building the habit) : >= 80%  
Month 2 onward : >= 95%  
Steady state : 100% on transactions above your threshold value

What to record each week (one row in a separate tracking sheet):

Week ending | Total PRs | POs issued before delivery | Vendor confirmations received | Compli

A compliance rate below 80% two weeks in a row means the process is not being followed. Identify which department or person accounts for the gap before week three.

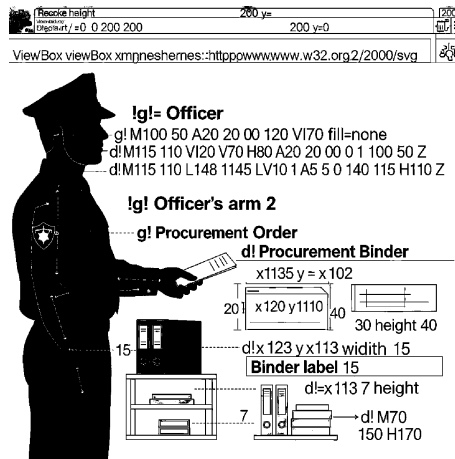
## Appendix B – Vendor Confirmation Standards

Acceptable written confirmation (mark Y):

Email from vendor that includes the PO number and states acceptance  
Signed and scanned/photographed copy of the PO returned by vendor  
WhatsApp message that includes the PO number explicitly  
Vendor's own order acknowledgement document referencing your PO number

Not acceptable (mark N, follow up):

Verbal agreement by phone only  
"OK" message without a PO number reference  
Vendor's sales rep saying they passed it on to logistics  
Goods arriving without prior written confirmation



WHERE THIS WORKSHEET COMES FROM

## Procurement Best Practices

*Every Rupiah Paid to a Vendor Starts With a Decision Before Signing*

by Ibrahim Anwar

This worksheet is one of nine in the *Procurement Best Practices* companion worksheet pack. The full pack is grouped into three categories: high-volume worksheets you can run weekly, niche-search worksheets for rare but high-value situations, and specific-case worksheets that walk you through a single concrete scenario.

Every framework, decision filter, and figure used in these worksheets is drawn from the chapters of the source book. The book sets the diagnosis, the worksheets give you the form to act on it.

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