

# How Local Businesses Can Eliminate Order & Invoice Errors

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## Introduction: The Hidden Cost of Order & Invoice Errors

For many local businesses, order and invoice errors are a frustrating reality that lead to delayed payments, costly chargebacks, and wasted time correcting mistakes. Even small errors—like a missing purchase order number or incorrect pricing—can cause significant disruptions.

But the good news? Many businesses are finding simple ways to prevent these issues before they happen. By reducing manual data entry, automating order processes, and improving communication with suppliers and customers, you can streamline operations and improve cash flow.

*This guide will walk you through why these errors happen, their true cost, and how to reduce them with practical steps and recommended tools.*

### Common Causes of Order & Invoice Errors

Here are some of the most frequent issues that cause payment delays, disputes, and extra work:

- **Manual Data Entry Mistakes** – Typos, miskeyed numbers, or forgotten fields lead to incorrect invoices or orders.
- **Mismatched Orders & Invoices** – When invoices don't match purchase orders, suppliers may reject them or delay payment.
- **Incorrect Pricing or Product Details** – Pricing discrepancies and missing SKUs create approval roadblocks.
- **Late or Lost Paperwork** – Paper invoices and emailed orders can get lost, misfiled, or delayed.
- **Lack of Standardization** – Different customers require different formats, making manual processing error-prone.

*These mistakes don't just cost money—they slow down your operations and create unnecessary stress.*



## 3 Steps to Reduce Order & Invoice Errors

### 1. Standardize Your Order & Invoice Processes

One of the easiest ways to prevent errors is to establish clear and standardized formats for orders and invoices. This includes:

- ✓ Using pre-approved templates for invoices and purchase orders.
- ✓ Ensuring all invoices include correct PO numbers, pricing, and product details.
- ✓ Setting up validation checks before sending documents to customers or suppliers.

### 2. Automate Repetitive Manual Processes

Many businesses manually enter data into multiple systems, increasing the risk of mistakes. Consider these automation tools:

- ✓ Accounting Software – QuickBooks, FreshBooks, and Xero help auto-fill invoice details and track payments.
- ✓ Inventory & Order Management Tools – Shopify, Square, and TradeGecko (now QuickBooks Commerce) sync orders and invoices automatically.
- ✓ OCR Scanning & AI Data Capture – Tools like Hubdoc and Expensify reduce manual data entry from invoices and receipts.

### 3. Explore Electronic Data Interchange (EDI) for Accuracy

EDI eliminates manual data entry errors by allowing businesses to send and receive orders, invoices, and other business documents electronically in a standardized format.

- ✓ Reduces errors by 90% compared to manual entry.
- ✓ Ensures invoices match purchase orders automatically before submission.
- ✓ Speeds up payment processing and reduces chargebacks.

### In-House vs. Third-Party EDI Providers

When considering EDI, businesses can choose between in-house solutions or third-party providers:

**In-House EDI** – Requires internal IT resources to set up, maintain, and update EDI infrastructure. It offers greater control but can be costly and complex.

**Third-Party EDI Providers** – Offer managed services where they handle setup, integration, and ongoing support, reducing the burden on internal teams while ensuring compliance and efficiency.

*If you're not ready for full EDI automation, starting with smaller automation tools can help transition your business toward more efficient operations.*

## Recommended Tools to Get Started with Automation

The following tools are commonly used by businesses to reduce errors and improve efficiency. We do not endorse any specific product, and businesses should evaluate which tools best fit their needs.

If you're looking for practical tools to reduce errors and automate processes, here are a few that businesses have found helpful:

### **For Invoicing & Payments:**

- QuickBooks Online – Automates invoicing, reconciles payments, and reduces errors.
- Bill.com – Streamlines invoice approvals and payments.
- Zoho Invoice – Offers automated billing with templates and reminders.

### **For Order & Inventory Management:**

- Shopify – Helps automate order tracking for e-commerce businesses.
- TradeGecko (QuickBooks Commerce) – Automates purchase orders and stock updates.
- Fishbowl Inventory – Syncs inventory data with accounting systems.

### **For Document Scanning & Data Capture:**

- Hubdoc – Extracts key invoice data and syncs it with accounting software.
- Expensify – Automates expense tracking and invoice scanning.
- ABBYY FlexiCapture – AI-powered document capture and automation.

*Using even one of these tools can significantly reduce order and invoice errors, helping you avoid costly mistakes and payment delays.*

## Considering EDI as a Long-Term Solution

While these tools help with automation, businesses that frequently exchange orders and invoices with suppliers or customers may benefit from Electronic Data Interchange (EDI) for a fully integrated solution. EDI can further eliminate errors, ensure compliance, and improve transaction accuracy. Many third-party providers offer managed EDI services, making it accessible without significant in-house IT investment.

## Next Steps: Implementing Small Changes for Big Impact

Reducing errors doesn't require a full system overhaul. Start with:

- Identifying your most common order/invoice mistakes.
- Using templates or automation tools for data consistency.
- Exploring EDI if you work with multiple suppliers/customers who require it.

If you're interested in learning more about how businesses are automating their business transactions, like invoices and purchase orders, while eliminating errors and improving efficiency, reach out to us for more insights.

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