

PMS Integration Readiness Checklist for PMCs

Use this checklist to evaluate whether your PMS integrations are truly supporting **procurement, compliance, and vendor performance** or quietly creating friction behind the scenes.

PMS & Vendor Data Sync

- Vendor records sync automatically
- No duplicate vendors across systems
- Vendor details stay consistent everywhere
- Status updates sync in real time
- Multi-PMS portfolios stay aligned

Compliance & Credentialing

- Compliance status syncs into the PMS
- Expired COIs are flagged immediately
- Only compliant vendors can be assigned work
- Requirements adjust by service type or owner
- Portfolio-level compliance visibility exists

Procurement & Purchasing Controls

- Only approved vendors appear in purchasing
- Approval rules are enforced automatically
- Requests are not delayed by missing data
- Rogue spend is minimized
- Procurement data is audit-ready

Bidding & Vendor Sourcing

- Bids start with a compliant vendor list
- New vendors can be sourced safely
- Vendors understand credentialing upfront
- Bid comparisons use consistent data
- Bid history is owner-ready and auditable

AP & Payment Accuracy

- W-9s sync automatically
- Invoice holds are not data-related
- Vendor records stay payment-ready
- Errors are rare and traceable
- Vendors are paid accurately and on time

Vendor Experience & Adoption

- No duplicate data entry for vendors
- Onboarding is simple and mobile-friendly
- Document requests are automated
- Expectations are clear upfront
- Vendor participation is high

How to Interpret Your Results

- **Mostly checked:** Integrations are supporting procurement well.
- **Some gaps:** Disconnected systems may be slowing teams or increasing risk.
- **Many unchecked:** Integration improvements could unlock faster procurement and stronger vendor performance.

If this checklist uncovered gaps, NetVendor can help evaluate your integrations and identify where targeted improvements will have the biggest operational impact.

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