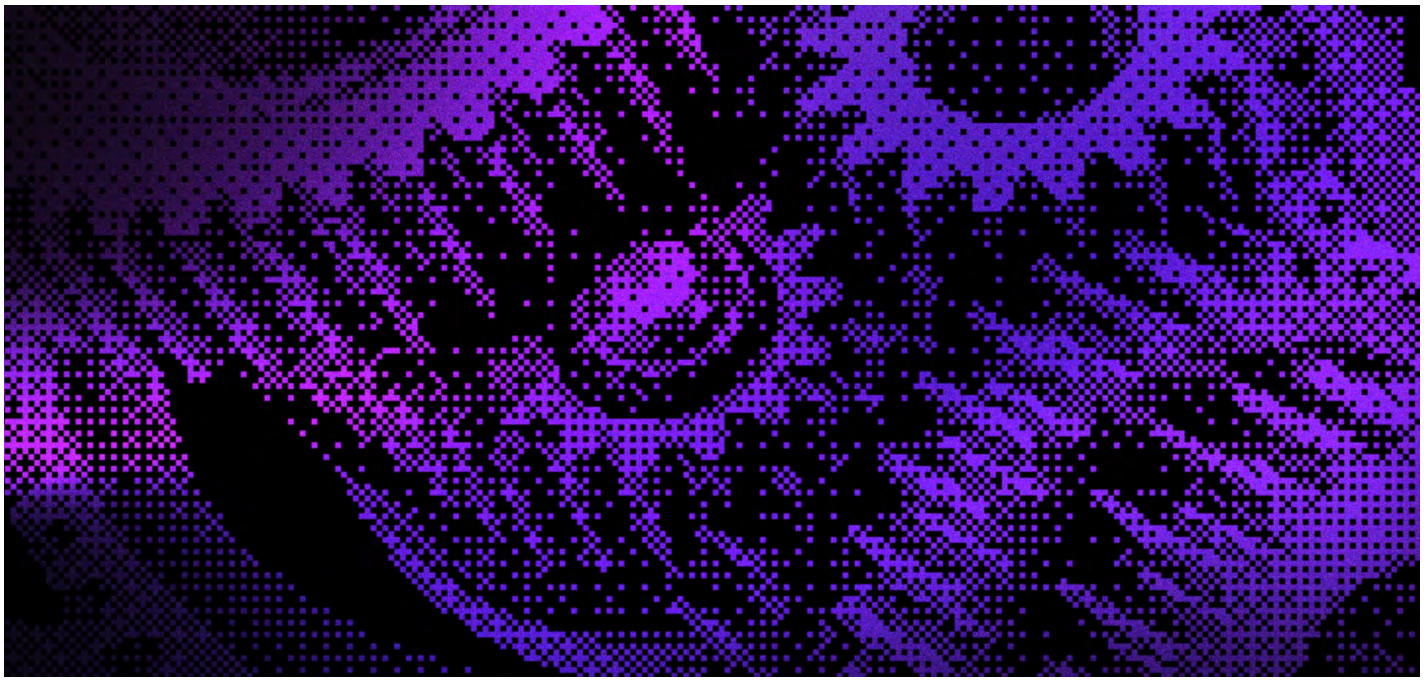
WRAPBOOK

EBOOK

What to Expect From Your Finance Software



A vendor checklist for production accountants and finance leaders.
Score your current platform, or any new one, in 15 questions.

INTRODUCTION

Production moves *faster* than it used to.

Timelines are shorter, budgets are tighter, and finance teams are expected to keep up without adding headcount. The tools they're given often haven't changed in years.

Use this checklist to find out how your software measures up. Bring it to your next vendor demo, or run your current platform through it.

How to score it

Mark each question Yes, Partly, or No.

2	**Yes**	2 points
1	**Partly**	1 point
0	**No**	0 points

Note: "Partly" covers workarounds, support tickets, and "it's on our roadmap."

Want your score in a few minutes?

Take the interactive version of this self-assessment. You'll answer the same 15 questions online, and we'll add up your score as you go, so there's no math to do by hand. When you're done, you'll see how your current platform stacks up and where it might be costing your team.

GET MY SCORE ↗

PART #01

One connected system

Why it matters to production accountants:

You stop re-keying data between systems and matching payroll exports against the GL.

Why it matters to finance leaders:

You get one source of truth across every project on the slate, and one vendor to manage.

	Question	Yes	Partly	No
01	Do payroll, spend, and accounting live in one platform, with one login and one shared set of data?	2	1	0
02	Do union and non-union payroll run in the same place and post to the same books?	2	1	0
03	Can you get your data out easily, through exports or integrations with third-party software your team already uses?	2	1	0
		Score		/ 6

Ask the vendor to show you: a payroll run showing up in the GL with no export or import step in between.

PART #02

Automation

Why it matters to production accountants:

The software accelerates simple tasks, while still keeping you in control of review. That means fewer late nights spent doing manual tasks.

Why it matters to finance leaders:

Your team spends its time on judgment calls, so the same team can support more projects.

	Question	Yes	Partly	No
04	Do timecards calculate hours-to-gross automatically as hours are entered?	2	1	0
05	When crew members come back for another project, can you rehire them in minutes from a saved profile?	2	1	0
06	Can you upload an invoice and have the vendor details and line items read and matched to the right PO, ready for your review?	2	1	0
07	Does the platform suggest account codes based on your history, so your team approves codes instead of entering each one?	2	1	0
		Score		/ 8

Ask the vendor to show you: an invoice going from upload to coded and ready for approval, live.

PART #03

Visibility

Why it matters to production accountants:

You should be able to find any transaction in seconds and customize your report templates.

Why it matters to finance leaders:

You see current numbers across every project without chasing anyone for them.

	Question	Yes	Partly	No
08	Can you search the general ledger across every project at once and find any transaction in seconds?	2	1	0
09	Can you build reports with exactly the columns you need and save them as reusable templates yourself?	2	1	0
10	Can you pay vendors directly from the platform, so payments show up in your books when they go out?	2	1	0
11	When you have a question, can you get an answer quickly, in the product or from an expert, without waiting on hold?	2	1	0
		Score		/ 8

Ask the vendor to show you: what the process looks like for building custom report templates, and whether it involves a phone call or support ticket.

PART #04

Control

Why it matters to production accountants:

You set things up the way your production runs and can make changes yourself without submitting a support ticket.

Why it matters to finance leaders:

Spending rules and access policies are enforced automatically on every project.

	Question	Yes	Partly	No
12	Can you set user permissions by company and by project yourself, controlling who can see and do what?	2	1	0
13	Can you build reusable, multi-step approval flows that route to the right people based on rules you set?	2	1	0
14	Can you see where every approval stands and where it's stuck?	2	1	0
15	Can you work in the GL directly, including copying and pasting entries?	2	1	0
		Score		/ 8

Ask the vendor to show you: how long it takes to give a new user access to one project and nothing else.

SCORECARD

Your score

26 to 30

Your software is keeping up. Use any gaps to push your vendor on what's next.

16 to 25

You're getting by, but your team is making up for what the software can't do.

15 or below

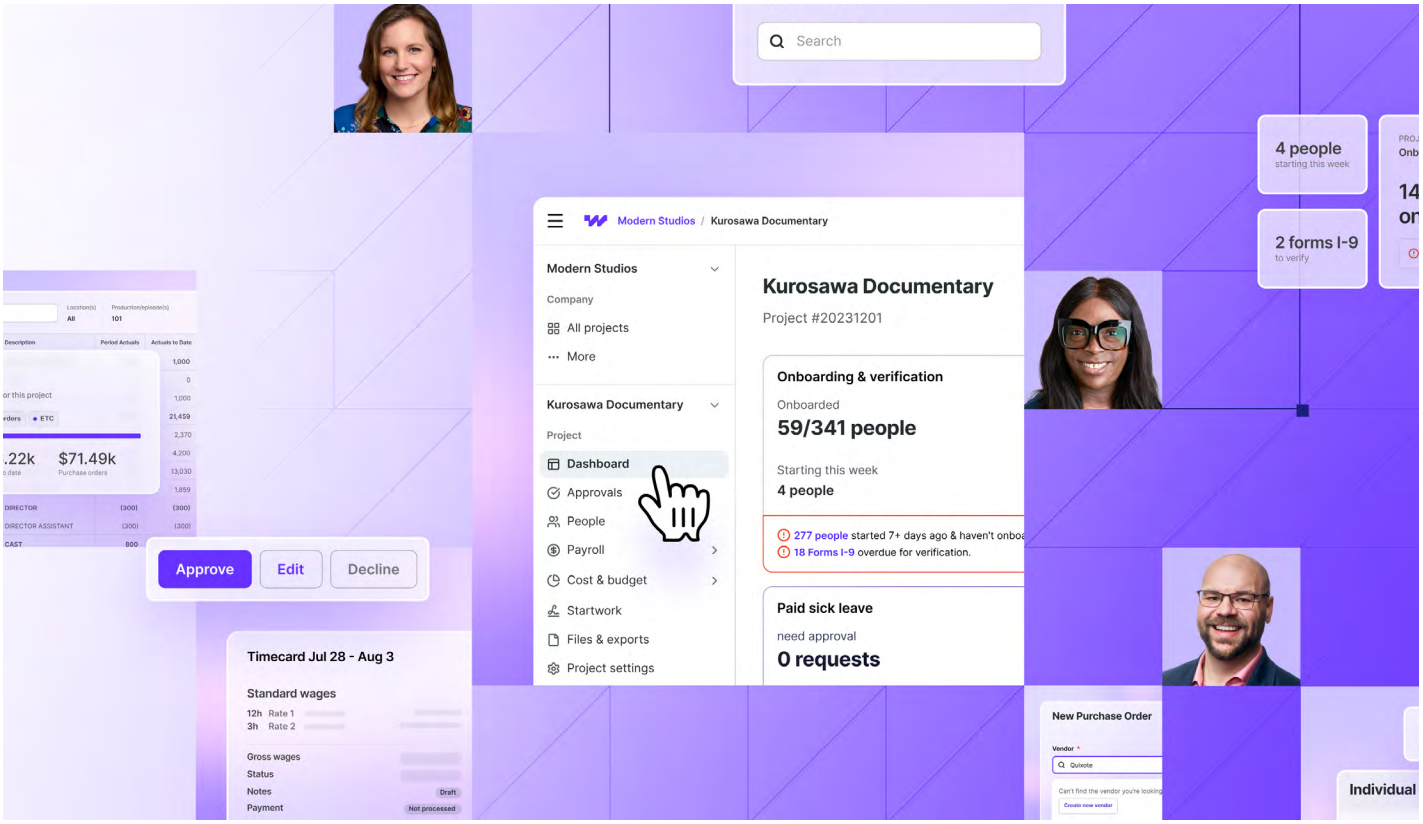
Your team is doing work your software should handle. You can expect a lot more.

PART #01	One connected system	/6
PART #02	Automation	/8
PART #03	Visibility	/8
PART #04	Control	/8
Total score		/30

Platform not meeting your expectations?

Wrapbook does everything on this list today. Payroll, spend, and accounting run on one platform. AI handles the first pass on routine work and your team reviews and approves it. Expert support is there when you need an answer.

SEE IT FOR YOURSELF ↗



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Wrapbook is the AI platform for production finance—an all-in-one solution that brings together payroll, spend, and accounting in a single, elegant system. Built for features, TV, or commercials, Wrapbook uses AI acceleration and concierge service to empower finance teams to do more with less.

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