

# Milestone 4: Purchase

## Activity 1: Purchase order creation

12:32 PM

4G

81

Add New | Purchase Or...

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New Purchase Order

Vendor Name\*

Select a Vendor

Deliver To\*

Organization

Customer

satishdharma20

Tamil Nadu

India

Change destination to deliver

Purchase Order#

PO-00004

Reference#

Date

17/10/2023

To create transaction dated before 01/07/2017, click here

Expected Delivery Date

dd/MM/yyyy

Payment Terms

Due on Receipt

Shipment Preference

Choose the shipment profile

☐ This transaction is applicable for reverse charge

At Transaction Level

Bulk Update Line Items

ITEM DETAILS

ACCOUNT

QUANTITY

RATE

TAX

Type or click to select an item.

Select an account

1.00

0.00

Select

Add another line

Sub Total

0.00

Discount

0 %

0.00

Adjustment

0.00

TCS

Select a ...

0

Total

0.00

Customer Notes

Will be displayed on purchase order

Terms & Conditions

Enter the terms and conditions of your business to be displayed in your transaction

Attach File(s) to Purchase Order

Upload File

You can upload a maximum of 10 files, 10MB each

Additional Fields: Start adding custom fields for your purchase orders by going to Settings > Purchased > Purchase orders.

Save as Draft

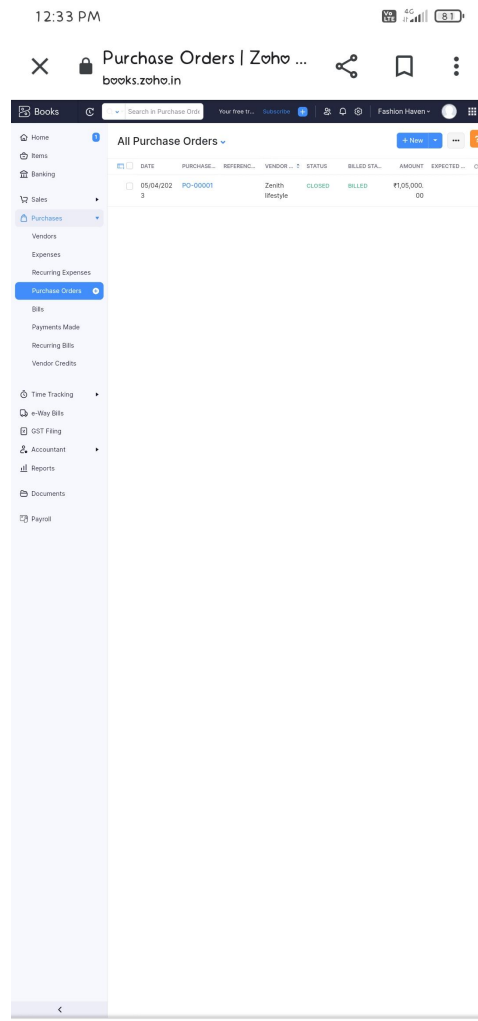
Save and Send

Cancel

Template: Standard Template

Change

## Activity 2: Purchase order to Purchase bill conversion



Activity 3: Direct vendor purchases bills creation

12:35 PM

4G+

81

Add New | Bills | Zoho B...  
books.zoho.in

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Vendor Name\*

Select a Vendor

Bill\*

Order Number

Bill Date\*

dd/MM/yyyy

To create transaction dated before 09/03/2023, click here

Due Date

17/10/2023

Payment Terms

Due on...

☐ This transaction is applicable for reverse charge

Transaction Level

All Transaction Level

ITEM DETAILS	ACCOUNT	QUANTITY	RATE	TAX
Type or click to select an item.	Select an account	1.00	0.00	Select a Tax

Add another line

Sub Total

0.00

Discount

0 %

0.00

TDS ☒ TC ☐ Select a ...

-0.00

Adjustment

0.00

Total

0.00

Notes

Attach Files to Bill

Upload File

You can attach a maximum of 3 files, 5MB each

Additional Fields: Start adding custom fields for your payments made by going to Settings ➔ Purchases ➔ Bills.

Save as Draft

Save as Open

Cancel

Template: 'Standard Template' Change

Make Recurring

Activity 4: Payment marking to purchase bill

Activity 5: Reconciliation of open bills

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Payroll

All Bills

DATE

BILL#

REFERENCE...

VENDOR...

STATUS

DUE DATE

AMOUNT

SALANCE...

05/04/2022

03

EvolveLife

PAID

05/04/2022

₹5,25,000.00

₹0.00

30/09/2022

01

PO-00001

Zenith lifestyle

PAID

30/09/2022

₹1,05,000.00

₹0.00