

BUYING

AFTER CREATING AN ITEM AND SUPPLIER,
THE FIRST THING YOU NEED TO DO IN ORDER TO PURCHASE ORDER IS YOU NEED
TO SEND QOUTATION TO THE SAID SUPPLIER.

CLICK SAVE AFTER FILLING ALL THE INFORMATIONS NEEDED.

for Quotation

Search or type a command (Ctrl + G)

Settings Help

Quotation 1 Not Saved

Save

Get items from

Series: PUR-RFQ-YYYY- Date: 06-13-2022

Supplier Detail

	Supplier	Contact	Email Id
1	LOUIS CLOTHING		

Add Row

Get Suppliers

Items

	Item Code	Required Date	Quantity	UOM	Warehouse
1	MAM00010	06-13-2022	20.000	Nos	Stores - C

Add Multiple Add Row

Link to Material Requests

Email Template

Message for Supplier

NOTE: YOU CAN CHANGE THE WAREHOUSE
AFTER SAVING YOU CAN CLICK SUBMIT.

r Quotation

Search or type a command (Ctrl + G)

Settings Help

Quotation 2 Draft

Menu Submit

Get items from

Submit this document to confirm

Date: 06-13-2022

Supplier Detail

	Supplier	Contact	Email Id
1	LOUIS CLOTHING		

Add Row

Get Suppliers

Items

	Item Code	Required Date	Quantity	UOM	Warehouse
1	MAM00010: PLAIN ...	06-13-2022	20	Nos	Stores - C

Add Multiple Add Row

Link to Material Requests

Email Template

Message for Supplier

AFTER SENDING FOR QUOTATION YOU CAN NOW PURCHASE ORDER.

How to create a Purchase Order

A Purchase Order can be automatically created from a Material Request or Supplier Quotation.

1. Go to the Purchase Order list, click on New.
2. Select the Supplier, required by date.
3. In the items table, select the item by code, you can change the required by date for each item.
4. Set the quantity and the price will be fetched automatically if set in the Item master.

Draft

PUR-ORD-2022-00002

Menu

Submit

Get items from Tools

Submit this document to confirm

DASHBOARD

Supplier

LOUIS CLOTHING

Date

06-11-2022

Reqd By Date

06-13-2022

ADDRESS AND CONTACT

CURRENCY AND PRICE LIST

Set Target Warehouse

Supply Raw Materials

No

Scan Barcode

Items

	Item Code	Reqd By Date	Quantity	Rate	Amount	
<input type="checkbox"/>	1	MAM00030: PRINTED GRAY T-...	06-13-2022	20	₱ 85.00	₱ 1,700.00

Add MultipleAdd RowDownloadUpload

Not Saved

Save

Get items from Tools

Series

PUR-ORD-YYYY.-

Date

06-11-2022

Supplier

LOUIS CLOTHING

Reqd By Date

ADDRESS AND CONTACT

CURRENCY AND PRICE LIST

Set Target Warehouse

Supply Raw Materials

No

Scan Barcode

Items

	Item Code	Reqd By Date	Quantity	Rate	Amount	
<input type="checkbox"/>	1	MAM00030	06-13-2022	20.000	85.00	1,700.00

Add MultipleAdd RowDownloadUpload

Total Quantity

20

Total Net Weight

0

How to create a Purchase Invoice: A Purchase Invoice is usually created from a Purchase Order or a Purchase Receipt. The Supplier's Item details will be fetched into the Purchase Invoice. However, you can also create a Purchase Invoice directly. To fetch the details automatically in a Purchase Invoice, click on the Get Items from. The details can be fetched from a Purchase Order or Purchase Receipt. For manual creation, follow these steps:

1. Go to the Purchase Invoice list, click on New.
2. Select the Supplier.
3. The posting date and time will be set to current, you can edit after you tick the checkbox below Posting Time.
4. Set the Due Date for payment.
5. Add Items and quantities in the Items table.
6. The Rate and Amount will be fetched.
7. Save and Submit.

New Purchase Invoice 2 Not Saved Save

Series

ACC-PINV-YYYY-

Date

06-11-2022

Supplier

LOUIS CLOTHING

Posting Time

11:02:49

Tax Id

☐ Edit Posting Date and Time

Due Date

06-11-2022

☐ Is Paid

☐ Is Return (Debit Note)

☐ Apply Tax Withholding Amount

ACCOUNTING DIMENSIONS

HOLD INVOICE

SUPPLIER INVOICE DETAILS

ADDRESS AND CONTACT

CURRENCY AND PRICE LIST

Create

Get items from

Purchase Order

Purchase Receipt

E > Accounting > Purchase Invoice

New Purchase Invoice 2

Search or type a command (Ctrl + G)

Make Purchase Order

Get Items

Search Term

Supplier

Date Range

LOUIS CLOTHING

<input type="checkbox"/>	Name	Supplier	Date
<input checked="" type="checkbox"/>	PUR-ORD-2022-00002	LOUIS CLOTHING	06-11-2022

ACCOUNTING DIMENSIONS

How to create a Purchase Receipt

A Purchase Receipt is usually created from a Purchase Order. In the Purchase Order, click on Create > Purchase Receipt.

To create a Purchase Receipt manually (not recommended), follow these steps:

1. Go to the Purchase Receipt list, click on New.
2. The Supplier name and the Items can be fetched from the Purchase Order by clicking on 'Get Items from > Purchase Order'.
3. You can set the Accepted Warehouse for all items in this Purchase Receipt. This is fetched if set in Purchase Order.
4. In case any Items are defective, set the Rejected Warehouse where those Items will be stored.
5. Select the Item and enter the quantity in the Items table.
6. The rate will be fetched and the amount will be calculated automatically.
7. You can expand the item row to change the Accepted Warehouse for an Item.
8. Save and submit.

E > Stock > Purchase Receipt

Search or type a command (Ctrl + G)

Settings Help

New Purchase Receipt 1 Not Saved Save

Series
MAT-PRE-YYYY-

Date
06-09-2022

Supplier
LOUIS CLOTHING

Posting Time
01:53:46.347982

Supplier Delivery Note

Time at which materials were received
☐ Edit Posting Date and Time
☐ Is Return

ADDRESS AND CONTACT

CURRENCY AND PRICE LIST

Accepted Warehouse

Raw Materials Supplied
No

Rejected Warehouse

Warehouse where you are maintaining stock of rejected items

Scan Barcode

Items	Item Code	Accepted Quantity	Rate	Amount	
<input type="checkbox"/>	1	MAM00030: PRINTED GRAY T-S...	20	P 85.00	P 1,700.00

Add Multiple Add Row Download Upload

You edited this
2 days ago

You created this
2 days ago

☐ Apply Tax Withholding Amount

ACCOUNTING DIMENSIONS

HOLD INVOICE

SUPPLIER INVOICE DETAILS

ADDRESS AND CONTACT

CURRENCY AND PRICE LIST

Raw Materials Supplied
No

☐ Update Stock

Scan Barcode

Items

	Item	Accepted Qty	Rate	Amount	
<input type="checkbox"/>	1 MAM00030: PRINTED GRAY T-S...	20	₱ 85.00	₱ 1,700.00	

Before creating and using a Purchase Order, it is advised that you create the following first:

- Supplier
- Item

How to create an Item

1. Go to the Item list, click on new.
2. Enter an Item Code, the name will be auto-filled the same as Item Code on clicking inside the Item Name field.
3. Select an Item Group.
4. Save.

The screenshot shows a 'New Item' form with the following fields and values:

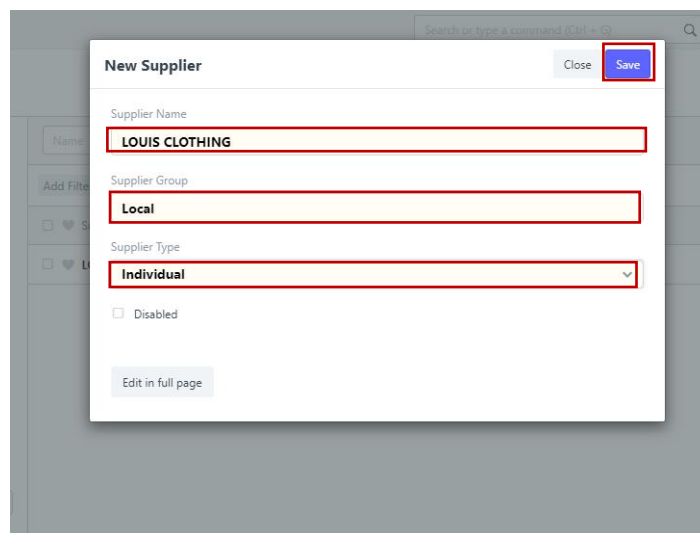
- Create Variant:** ☐
- Item Code:** MAM00040
- Item Name:** PLAIN ORANGE T-SHIRT
- Item Group:** Products
- Default Unit of Measure:** Nos
- Maintain Stock:** ☒
- Opening Stock:** (empty field)
- Standard Selling Rate:** (empty field)

At the bottom, there is a link: [Edit in full page for more options like assets, serial nos, batches etc.](#)

The 'Save' button is highlighted with a red box.

How to create a Supplier

1. Go to the Supplier list and click on New.
2. Enter a name for the supplier.
3. Select the supplier group whether Pharmaceutical, Hardware etc.
4. Save.



The screenshot shows a 'New Supplier' modal form. The form has three main input fields: 'Supplier Name' with the text 'LOUIS CLOTHING', 'Supplier Group' with the value 'Local', and 'Supplier Type' with a dropdown menu showing 'Individual'. There is a 'Disabled' checkbox which is unchecked. At the top right of the modal are 'Close' and 'Save' buttons. At the bottom left is an 'Edit in full page' button. The background shows a blurred view of a supplier list with columns for Name, Add Filter, and icons.

New Supplier Close Save

Supplier Name
LOUIS CLOTHING

Supplier Group
Local

Supplier Type
Individual

☐ Disabled

Edit in full page