Knowledge Base

Raise Supplier Bills

Once you have raised a purchase order (refer to Create Purchase Orders for more information) and you have received the goods (refer to Receive Goods for more information), you can use Gojee to raise a supplier bill to close out the purchase order. This will mark the purchase order as complete and the supplier bill will be sent into Xero.

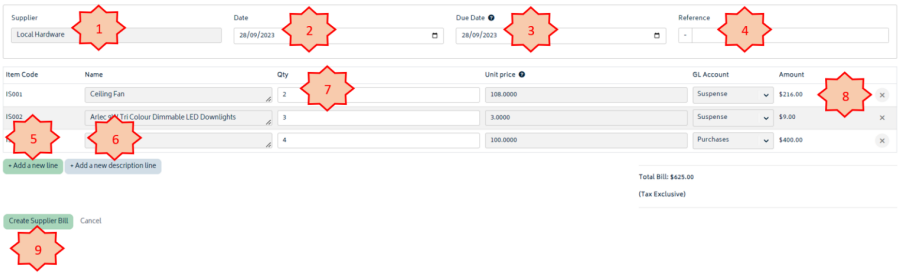
Note: You can raise supplier bills in several parts for the one purchase order. So if you need to bill part of the purchase order then this workflow is supported in Gojee. Purchase orders will be assigned a status of partially billed if there is a partial supplier bill allocated to the order until the billing is completed.

To get started, navigate to the Reports > Purchase Orders page:

1. Filter the list onto the “All”.
2. Search for the purchase order from the list.
3. Click on the actions button and select “Raise Supplier Bill”

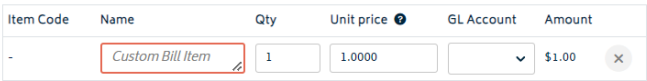
Tip: if you don’t know the purchase order number, you can also use the search bar to search for one of the item codes on the purchase order, or the supplier, or job number.

You will be presented with the supplier bill page:

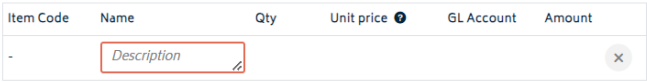


The numbered items in the image above are described below:

1. Supplier: This defaults from the purchase order.
2. Date: The date the supplier bill will be added onto the Xero file.
3. Due Date: The date that the supplier bill is payable.
    - Note: The default due date is derived from the setting configured in Xero organisation settings. For more information on how to use and configure this setting in Xero please click **here.**
4. Reference: The reference that will show on the Supplier Bill in Xero.
5. Add a new line: You can add a new line onto the supplier bill that wasn't originally part of the purchase order.
    - **Note:** items added in this way will have no reservations to jobs, and will be charged to jobs. If you want the item to be allocated as a cost for a job, you will need to go back and edit the purchase order prior to receiving the goods, or create a new purchase order for a job for the additional item.
    - When adding a new line item onto the bill, you will see a new line added as follows



6. Add a new description line: Use this function to add extra text onto the supplier bill, with no quantity or price associated with it.
    - When adding a new description line item onto the bill, you will see a new line added as follows.



7. Quantity: This is the quantity of the line item.
8. (x) Remove Line: Use this option to remove a line completely from the supplier bill. This may be useful when the supplier sends the goods in multiple shipments, with multiple bills for the one purchase order.
9. Create Supplier Bill: Hit this button once all the information is entered and the system will record the supplier bill.

Note: The item code, the name, the unit price and the GL account are locked for editing. This information is pulled from the goods receipt and/or the purchase order.

Once complete, the purchase order will be updated to either “Billed” or “Partially Billed” and a supplier bill transaction will be pushed through to Xero.

Note: If you’d like to add an attachment to the supplier bill, navigate to the supplier bill list page (refer to the section below on viewing supplier bills), and click on the deep link into Xero. This will load up the specific supplier bill and allow you to add the attachment(s).

View Supplier Bills

Navigate to the Supplier Bill list page to see a list of all the supplier bills raised in Gojee.

Next: Back to Knowledge Base.