

Purchase Management

Adding a Purchase

Step 1: Go to Add Purchase

- Navigate to **Purchases → Add Purchases**.

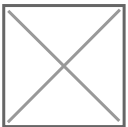


Step 2: Select Supplier

1. Type the **Supplier Name** or **Business Name**.

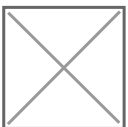


1. If the supplier does not exist, add them first via:
Contacts → Suppliers → Add or click on the **add** button.



Step 3: Enter Purchase Details

1. **Purchase Reference Number**
2. **Purchase Date**
3. **Purchase Status**
4. **Purchase Order**



Step 4: Select Business Location

- Choose the location where the purchase is being added.



- To add a new location: **Settings → Business Locations → Add Location.**



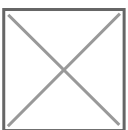
Step 5: Add Products

1. Type the **Product Name** or **scan the barcode**.
2. Select the correct product from the suggested list.
3. Enter:
 - **Purchase Quantity**
 - **Purchase Price**
 - **Tax Information**



Step 6: Apply Discounts (Optional)

1. Select **Discount Type**: Fixed or Percentage.
 2. Enter the **Discount Amount**.
 3. Select **Purchase Tax**.
 4. Enter an **Additional Notes**.
- The system auto-calculates the total after discount.



Step 7: Add Additional Details

- **Shipping Details & Charges**
- **Payment Status**
- **Payment Account**
- **Payment Methods**



Step 8: Save and View Purchases

- Save the purchase entry.
- View all purchases via **Purchases → List Purchases**.
- Print product labels by clicking **Print Labels** in the List Purchases screen.



Step 9: Troubleshooting “No Matching Product Found”

This error appears in three cases:

1. **Product not found:** Check if the product exists in **List Products**.
2. **Business Location mismatch:** Ensure the product is assigned to the selected location in **Add/Edit Products**.
3. **Stock Management disabled:** Enable stock management in the product settings to make it available for purchase.

Step 10: Understanding Purchase Price Differences

- **Default Purchase Price:**
 - Price entered when the product was first added.
 - Shown in **View Product**.
 - Remains unchanged unless manually updated.
- **Current Purchase Price:**
 - Price from the most recent purchase.
 - Used in **Current Stock Value by Purchase Price** report.
 - Can vary due to market changes or supplier costs.

Example:

- Last month’s steel price (Default Purchase Price): \$120
- This month’s steel price (Current Purchase Price): \$125
- **View Product:** \$120
- **Stock Value Report:** \$125

Revision #1

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