Purchase Contracts/Bills/Reports
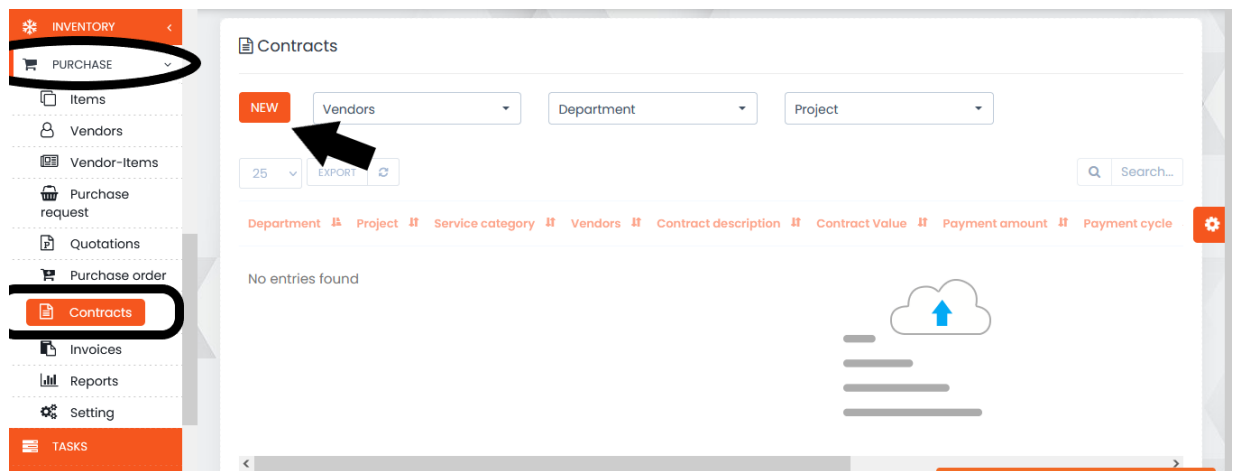
VENDOR CONTRACTS

To keep track of all your vendor Contracts we have a section under vendors just for that. To access your Vendor Contracts section, click "PURCHASE" followed by "Contracts in the drop down menu. From here you can see all your vendor contracts and filter according to the company department and project. You can select multiple companies, projects, and departments to see exactly what you need.

To create a new contract, click "NEW" in the left hand corner of the screen.

Create new contract

* Contract description
od Vendor Agreement

Service category
[   ]

* Project
TEST ▾

Purchase Order
None ▾

* Vendors
Sam's Seafood ▾

Department
None ▾

* Start date
2021-11-03 📅

End date
2022-11-02 📅

Payment terms
Net 30

Payment amount
[   ]

Payment cycle
Monthly ▾

Contract Value
[   ]

Signed status
Signed ▾

Signed date
2021-11-03 📅

Attachments
[Browse...] No file selected.   [+]

Enter of the details of the contract you would like to capture. You can attach a copy of the contract to keep in your files. If you have multiple contracts or additional documents that you would like to add to add click the [+] button to add another attachment.

Description
[   ]

With the new contract entered we can view the contracts. To view, edit, or delete the contract click the desired button below the contract details. To view all the contract sections click and drag the scroll bar to the right of the screen, or simply click the scroll arrow at the bottom right hand corner of the screen. Another option to view all the sections at once is to reduce your zoom level percentage on your browser.

📄 Contracts

[NEW]   [Vendors ▾]   [Department ▾]   [Project ▾]

[25 ▾] [EXPORT] [⟳]   🔍 Search...

Department	Project	Service category	Vendors	Contract description		Contract Value	Payment amount	
Cafeteria	TEST	Food	Sam's Seafood	TEST-TUSLR/SAMSSEAFOODVENDORAGREEMENT-SAM'SSEAFOOD - Tuslr/Sams Seafood Vendor Agreement		0.00	0.00	
				View | Edit | Delete				

Showing 1 to 1 of 1 entries   Previous [1] Next

Contracts

NEW | Vendors ▾ | Department ▾ | Project ▾

25 ▾ | EXPORT ↻ | 🔍 Search...

Department ⇅	Project ⇅	Service category ⇅	Vendors ⇅	Contract description ⇅	Contract Value ⇅	Payment amount ⇅	Payment cycle ⇅	Payment terms ⇅	Start date ⇅	End date ⇅	Status ⇅
Cafeteria	TEST	Food	Sam's Seafood	TEST-TUSLR/SAMSSEAFOODVENDORAGREEMENT-SAM'SSEAFOOD – Tuslr/Sams Seafood Vendor Agreement	0.00	0.00	Monthly	Net 30	2021-11-03	2022-11-02	Valid

Showing 1 to 1 of 1 entries

Previous | 1 | Next

VENDOR BILLS

To enter a vendor bill, click on "PURCHASE" and in the drop down menu select "Invoices". Click on "NEW"

In this section you can enter the details of the vendor's bill. Click "SAVE at the bottom right-hand corner to complete entering the bill.

+ Add invoice

* Invoice number
#INV00002

* Invoice date
2021-11-03

🏷 Tags
Tag

Contract
TEST-TUSLR/SAMSSEAFOODVEN▾

Invoice amount
150.00

Transaction ID
211103SS01

Transaction date
2021-11-03

Tax
Sales Tax ▾

Tax Value
0.045

Vendor note

Total included tax
150.045

Admin Note

Terms & Conditions

Attachments
Browse... No file selected. +

SAVE

To view the all the invoice details click the scroll bar and drag it to the right. You can also click the scroll arrow button and hold it until you move the scroll bar to the right.

Currently we see the payment request status as blank. This is showing blank since the approval setting wasn't set for the payment requests. If you would like to adjust the approval settings for the payment request click on "PURCHASES" followed by "Settings" and select the approval tab. Click "New Approval Settings" and in that section you will be able to add approvers for the payment request. We can also see that currently the payment status as unpaid. To process a payment click the "View" button underneath the invoice name.

From here we can view the payment record, send reminders, add a task for the invoice, make and view notes, and view or add attachments. We can also mark the invoice as paid. Click the 🟥 PAYMENT button to enter the payment details.

New payment

* Amount

150.05

* Payment Date

2021-11-03

Payment Mode

Bank

Transaction ID

211103SS01_PYMT

Note

Payment processed in full for invoice 211103SS01

CLOSE SAVE

Enter the payment details as desired. Once the payment details are complete click "SAVE" to mark the invoice as paid.

#INV00002

| Purchase invoice | Payment record | Reminders | Tasks | Notes | Attachment |

PAID

Invoice number:	#INV00002	Invoice date:	2021-11-03	🏷 Tags
Contract:		Invoice amount:	150.00	Tag
ST-ISLR/SAMSSEAFOODVENDORAGREEMENT-AM'SSEAFOOD				Transaction ID: 211103SS01 Transaction date: 2021-11-03
Tax:	1%	Tax Value:	150.00	Added from: Samantha Gaag Added date: 2021-11-03
Total:			150.05	Vendor note:
				Terms & Conditions:

We can now see the purchase invoice marked as paid in green above the invoice number.

#INV00002

| Purchase invoice | Payment record | Reminders | Tasks | Notes | Attachment |

PAID

Payments for purchase invoice #INV00002

| 25 ⌄ | EXPORT | | | | 🔍 Search... |

Amount ⇅	Payment Mode ⇅	Transaction ID ⇅	Date ⇅	Approval status ⇅	Options ⇅
150.05	Bank	211103SS01_PYMT	2021-11-03	Approved	👁 ❌

Showing 1 to 1 of 1 entries   Previous 1 Next

Under the payment record tab we can see the payments listed. To view the payment in detail, click the 👁 icon. To delete the payment, click the ❌ icon. If you click the ✎ edit button you will only be able to edit the invoice not the payment. Once a payment is made you will only be able to delete the payment and create a new one.

PURCHASE REPORTS

We have a wide array of Purchase Reports to choose from. To access these reports click on "PURCHASE" from the left-hand menu and then select "Reports" from the drop down menu. Here we can see the reports split into two categories: Reports by Table and Charts Based Report. The Reports by Table will give you a list of the reports under that category. The charts based reports will provide a graph or chart with the information in the system.