

# Purchase process

It usually goes this way:

Purchase Deal (Optional)- Purchase Quote (Optional) - Purchase Order - Purchase Invoice - Purchase Transfer (for products) - Inventory (for Products), but it can be configured to skip some steps if do not necessary.

In order to start, Products, services and Price lists has to be defined. Please, refer to [Products and services](#) section

All objects part of the process or related are listed in containers **Purchases** section of **Commercial Management module**.

Commercial Management /

 **Purchases** (Ordered Relations Container)



Purchase Deals



Purchase Quotes



Purchase Orders



Purchase Invoices



Purchase Price Lists



Purchase Transfers



Products and Services



Purchase Contracts



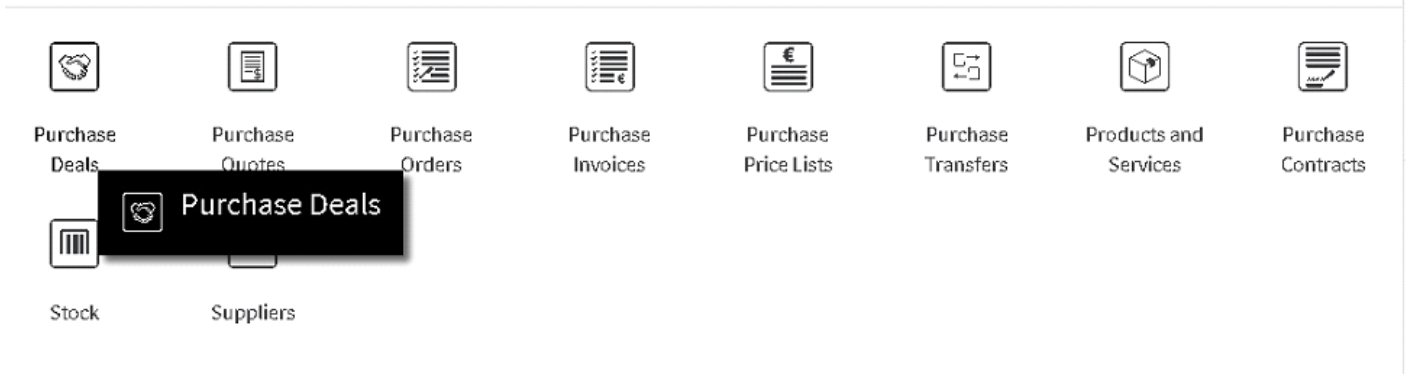
Stock



Suppliers

## Starting a Purchase Deal

- **Starting a Purchase Deal** can be done directly from the Purchase Deals container in Commercial Management folder



- Via button **Create New Purchase Deal**
- Or in the usual way via **Create New** Menu, **Other, Purchase deal**

Several basic details need to be defined upon starting: Name (you choose as per important information), Seller and Buyer, Currency and Price List (Mandatory)

Seller can be chosen within suggestions, shown after entering several letters in the Seller field. The list of available options to choose from contains companies, defined as External and Suppliers. [LINK TO Contacts](#)

There are other optional details, such as Manager, Close date, Payment Method. Payment terms, Shipping method, Contacts etc., that can be added or edited later.

Enumerators can be added in advance to use automatic numbering. Creating Enumerator

Standard edit ▾

Collaborators: administrator

Name \*

Description **B I U S A** ...

Deal #

Enumerators

Seller \*

Buyer \*

Contacts

Manager

Close Date

Currency \*

Price Lists

Items	Item	Quantity	Single Price	Total Net:	Discounts	Taxes	Total Gross:
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Subtotal: €0.00  
 Discount: €0.00  
 Subtotal after discount: €0.00

Items can be added now or later on by Actions/Edit.

**Add item** is used for adding defined products/services (see Products and Services), included in the corresponding selected Price list.

**Add custom item** does the same thing, for the items, which are not defined as products, usually this is necessary for custom products, with a special description or price, needed once.

By pressing Add item, a new field is shown, where to select the item to be sold and define Quantity and Price will appear, once Quantity is selected, VAT, taxes (fixed amount or percentage, discounts (fixed amount or percentage) and relations if any.

Item	Quantity	Single Price	Total Net:	Discounts	Taxes	Total Gross:
<input type="text"/>	<input type="text"/>	<input type="text"/>	€0.00	€0.00	€0.00	€0.00
Single Stock 1						
Service on Stock Maintenance Yearly						
		Amount	Percent			%
Discounts		Amount	Percent			%
Notes	<input type="text"/>					<input type="button" value="⌵"/> <input type="button" value="⊕"/>
Relations	<input type="text"/>					<input type="button" value="⌵"/> <input type="button" value="🔍"/>

Subtotal: €0.00  
 Discount: €0.00  
 Subtotal after discount: €0.00  
 Taxes: €0.00  
**Total: €0.00**

More Items can be added by buttons below.

After entering all details, press Save and the item will appear in the Deal. If amendment is needed that can be done via Actions/Edit (or Edit button) and pressing on the item to view the fields described above.

Purchase #01 (Purchase Deal)

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Creator: administrator  
 Created At: 11/11/2021, 8:39:28 PM  
 Close Date:  
 Manager:  
 Probability:  
 Priority:  
 Category:

Full Name: Supplier International  
 Emails: SupplierINT@mail.com  
 Phone Numbers: +44255336444  
 Contacts:

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**Properties**

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Name: Purchase #01  
 Description:  
 Deal #:  
 Seller: [SP Supplier International](#)  
 Contacts:  
 Close Date:

Buyer: [SP PBT EU Ltd](#)  
 Manager:

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Currency: EUR  
 Price Lists: [SP Purchase Price List cheap](#)

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**Containers:**

Item	Quantity	Single Price	Total Net:	Discounts	VAT	Taxes	Total Gross:
Single Stock 1	1 pc	€80.00	€80.00		(No VAT)		€80.00
Service on Stock Maintenance Yearly	1 year	€40.00	€40.00				€40.00
Subtotal:							€120.00
Discount:							€0.00

Additional details such as **Probability, Priority, Category and Container** could also be defined if needed.

Deal # by default is a text, depending on the company policy for numbering Purchase deals, however automatic numbering can be additionally configured. Enumerators can be added in advance to use automatic numbering. [Creating Enumerator](#)

After entering the necessary details and Saving Deal is created. If edit is needed that can be done via **Actions** Menu/**Edit**.

## Purchase Deal Stages

Default Stages of the Purchase Deal are: Qualification, Analysis, Proposal, Negotiation, Close (Won/Lost)

The screenshot shows a web interface for a Purchase Deal. At the top, it says "Purchase #01 (Purchase Deal)" with a menu icon on the right. Below this is a horizontal progress bar with five stages: Qualification, Analysis, Proposal, Negotiation, and Close. The "Qualification" stage is currently active. Below the progress bar, there are two sections: "Deal details" and "Contact".

**Deal details:**

- Creator: administrator
- Created At: 11/11/2021, 8:39:28 PM
- Close Date:
- Manager:
- Probability:
- Priority:
- Category:

**Contact:**

- Full Name: Supplier International
- Emails: SupplierINT@email.com
- Phone Numbers: +44255336444
- Contacts:

## Create a Quote from the Deal


Creating a Quote from the Deal can be done in any of the Deal's stages and That is done via **Actions** Menu/**Generate Quote**.

The screenshot shows a dropdown menu titled "Actions". The menu items are: Add Bookmark, Attach File(s), Change Property, Copy, Delete, Edit, Export to CSV, Export to Excel, Generate Quote (highlighted in blue), Pop Out, and Relate To. A tooltip for "Generate Quote" is visible over the "Pop Out" item.

Once Quote is generated, the relation between the Deal and the Quote can be seen in the tabs at the bottom of the Deal object.

Activity Related Tasks Contacts Contracts Deals Quotes Orders Invoices Relations

Title



 **Purchase #01**

The generated quote has the same Title as the Deal. In order to avoid confusion, the text in brackets near the name of the Object shows the kind of Object it is (Purchase Quote).

It can be Edited by **Edit** Button or via **Actions** Menu/**Edit**.

Details can be added or edited.

Quote # by default is a text, depending on the company policy for numbering Purchase quotes, however automatic numbering can be additionally configured. Enumerators can be added in advance to use automatic numbering. [Creating Enumerator](#)

 **Purchase #01** (Purchase Quote) 



Qualification Sent to Client Reviewed by Client Close


Description

**Seller**  
 Full Name: [Supplier International](#)  
 Address: United Kingdom  
 Phone Numbers: [+44255336444](#)  
 Emails: [SupplierINT@mail.com](mailto:SupplierINT@mail.com)

**Buyer**  
 Full Name: [PBT EU Ltd](#)  
 Address: Bulgaria, Sofia, 1000, Solunska Str, 58  
 Phone Numbers: [+359888222333](#)  
 Emails: [sales@pbteu.com](mailto:sales@pbteu.com)

Properties ^

Name: Purchase #01	Date: 11/12/2021
Quote #:	Validity:
Seller:  <a href="#">Supplier International</a>	Buyer:  <a href="#">PBT EU Ltd</a>
Contacts:	Manager:

Price Lists:  <a href="#">Purchase Price List cheap</a>	Payment Method:
Currency: EUR	Payment Terms:
Quote Type:	Shipping Method:
Containers:	

Relations:

Item	Quantity	Single Price	Total Net:	Discounts	VAT	Taxes	Total Gross:
<a href="#">Single Stock 1</a>	1 pc	€80.00	€80.00			(No VAT)	€80.00
<a href="#">Service on Stock Maintenance Yearly</a>	1 year	€40.00	€40.00				€40.00

	Subtotal:	€120.00
	Discount:	€0.00
	Subtotal after discount:	€120.00
	Taxes:	€0.00
	VAT 0%:	€0.00
	<b>Total:</b>	<b>€120.00</b>

Activity Related Tasks Contacts Contracts Deals Quotes Orders Invoices Relations

Quote has the following stages:

**Qualifications, Sent to Client, Reviewed By Client, Close (Approved/Declined)**, which can help track the different Quote stages.

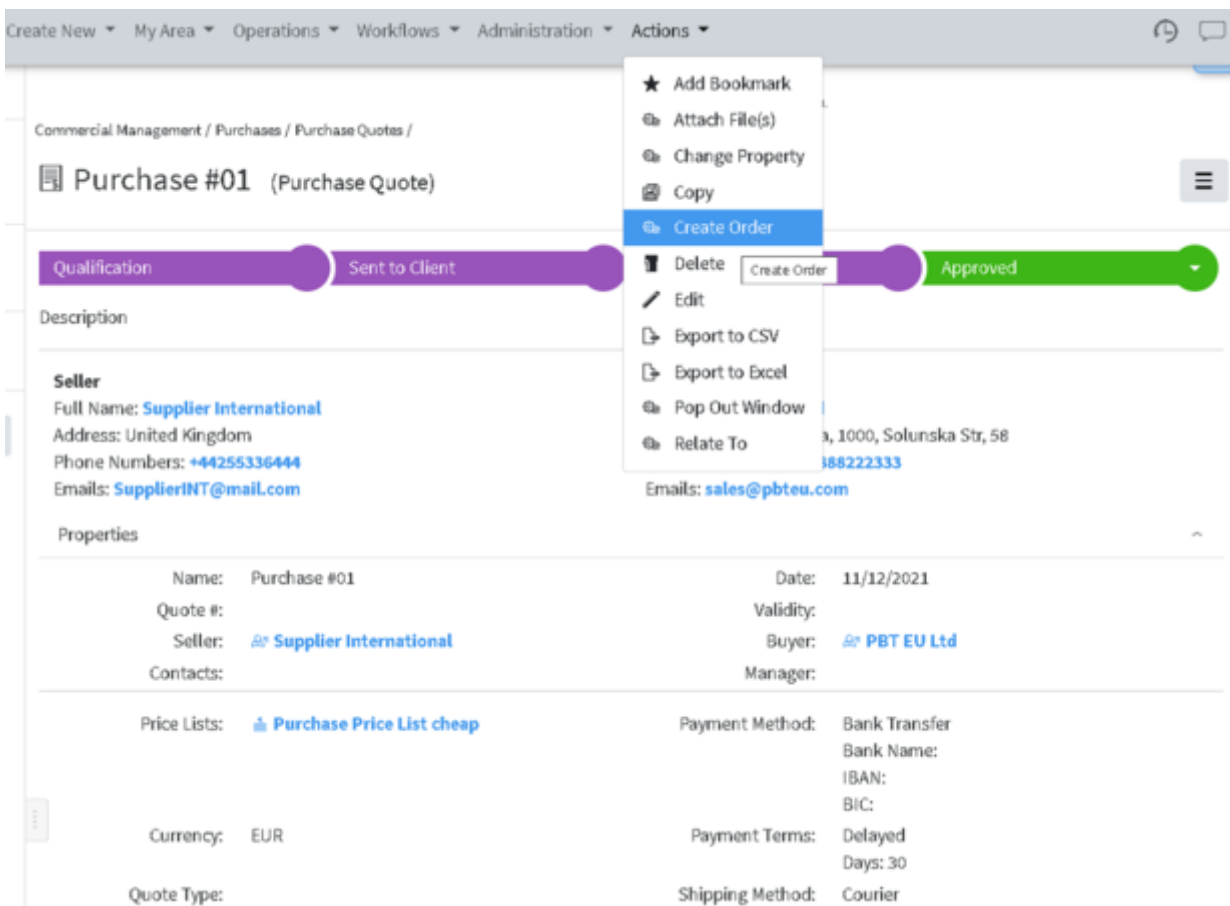
If necessary, **Fill in template** operation can be used to generate previously designed template for Quotation.

Next step is Create Order from Quote

## Create Order from Quote

Order can be created from Quote or directly from the button in the Purchase Quote folder.

In case created from Quote, the details are copied to the Order created.



The screenshot shows a software interface for managing Purchase Quotes. The main header indicates the current view is 'Purchase #01 (Purchase Quote)'. A progress bar at the top shows the stages: 'Qualification' (purple), 'Sent to Client' (purple), and 'Approved' (green). The 'Create Order' button is highlighted in blue in the Actions menu. The interface displays various details for the quote, including Seller information (Supplier International), Properties (Name: Purchase #01, Date: 11/12/2021), and Payment Method (Bank Transfer).

Property	Value
Name	Purchase #01
Date	11/12/2021
Quote #	
Validity	
Seller	Supplier International
Buyer	PBT EU Ltd
Contacts	
Manager	
Price Lists	Purchase Price List cheap
Payment Method	Bank Transfer
Bank Name	
IBAN	
BIC	
Currency	EUR
Payment Terms	Delayed
Days	30
Quote Type	
Shipping Method	Courier

Again, the Purchase order created is opened automatically and can be edited or details can be added via **Edit** Button or via **Actions** Menu/**Edit**.

The generated Purchase order has the same Title as the Purchase Quote

Order # by default is a text, depending on the company policy for numbering Purchase orders, however automatic numbering can be additionally configured. Enumerators can be added in

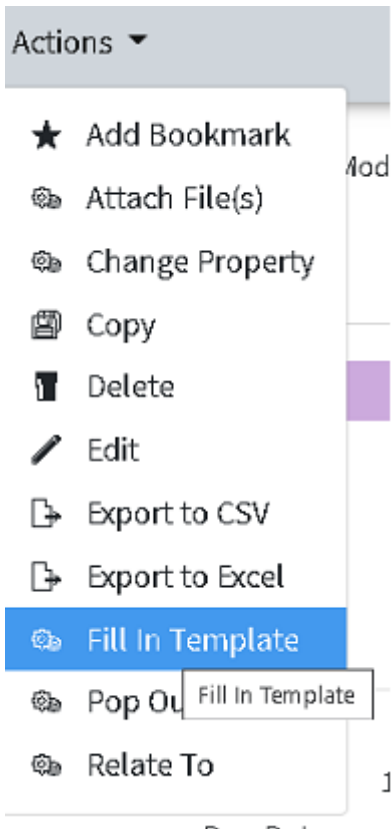
advance to use automatic numbering. [Creating Enumerator](#)

Stages of the Purchase order are as follows: Draft – Validated – Processed – Close (Delivered/Canceled)

Once it is Validated Fill in Template operation can be used to create Purchase Order documents.

It is available via button or via **Actions** Menu/**Fill in template**.

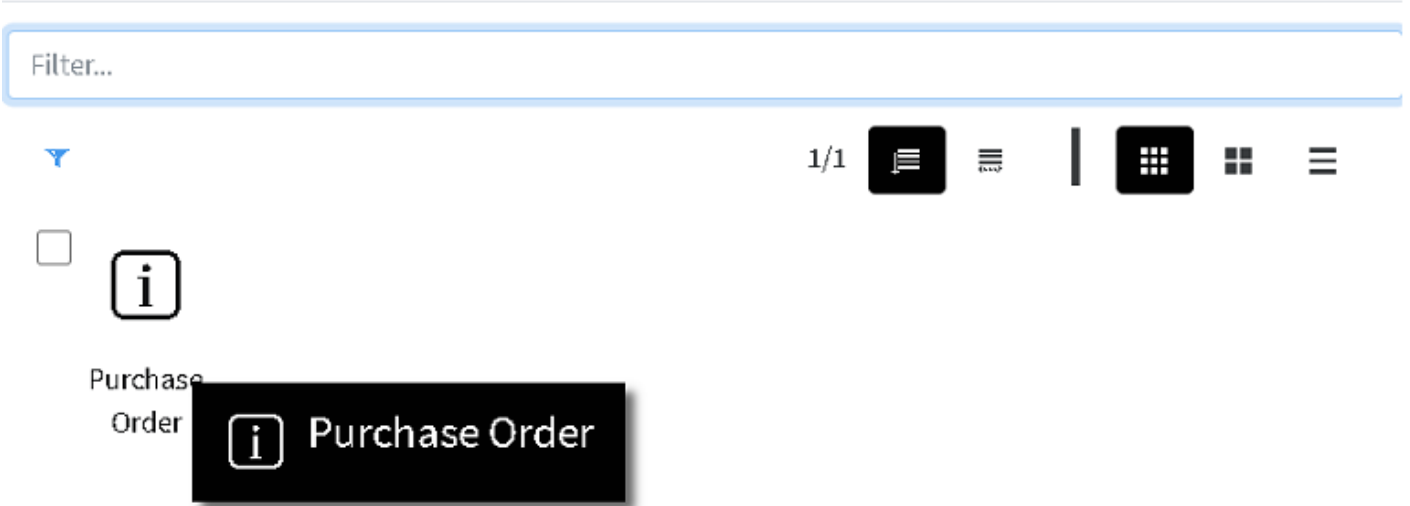
It can be used to generate from previously created template, a file in pdf format, which can be sent to the seller if necessary.



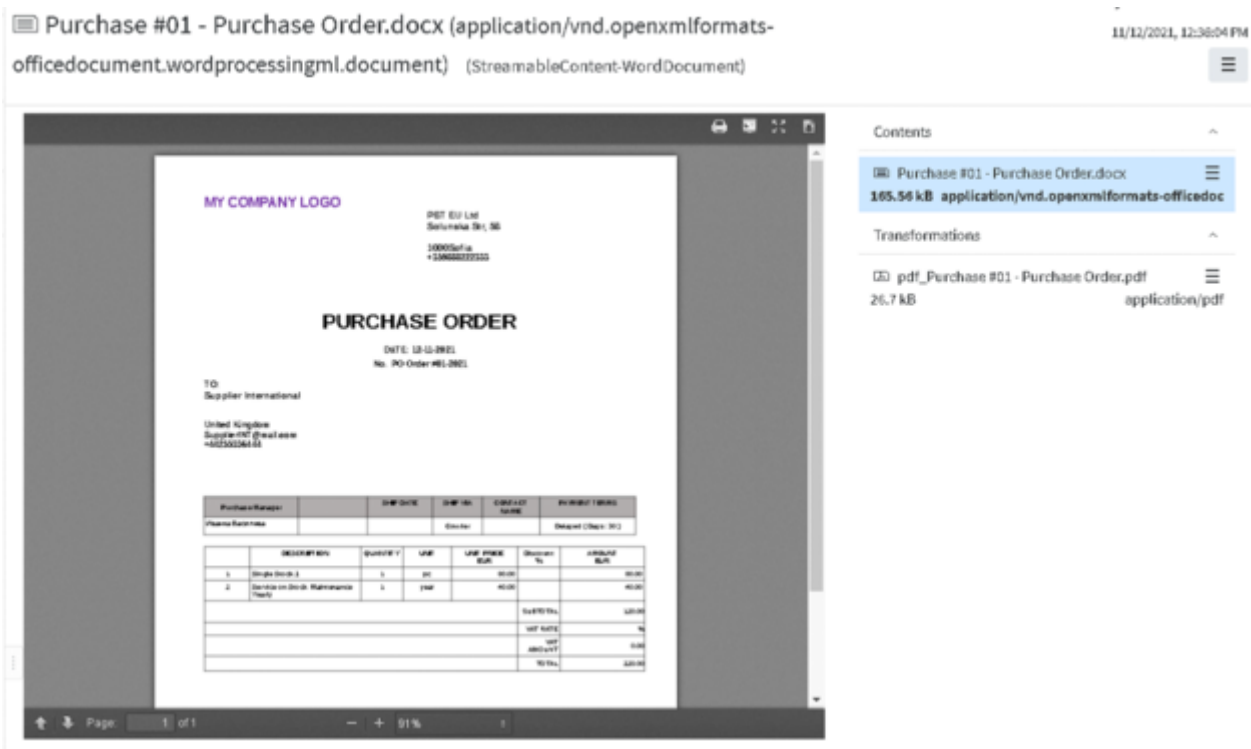
Here is how it can be done:


After clicking on the Fill in template button, a window opens, asking to Select the template to be used. The corresponding templates appear possible for selection

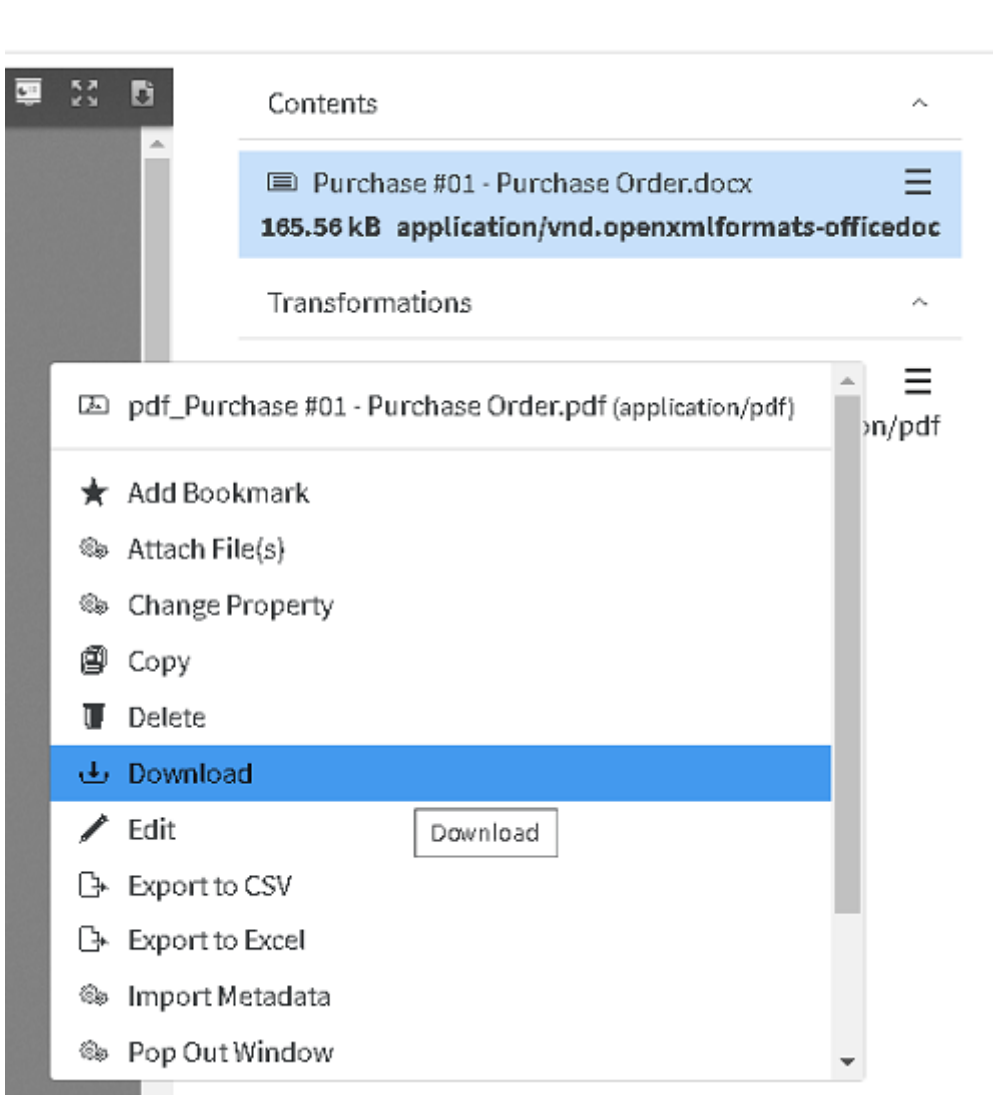
# Select Object



Once selected, the template is created and opened in .docx format, and the corresponding .pdf file can be seen in the Transformations field on the right.



Names of the generated files are combination between Title of the Purchase order and Template name. It can be downloaded by pressing on the  sign



When in Purchase order, these files appear in the Relations tab at the bottom

Activity	Related Tasks	Contacts	Contracts	Deals	Quotes	Orders	Invoices	Relations
Title	Created At	User Updated At						
<input type="checkbox"/> Purchase #01 - Purchase Order.docx (application/vnd.openxmlformats-officedocument.wordprocessingml.document)	11/12/2021, 12:36:04 PM	11/12/2021, 12:36:04 PM						

## Issue an Invoice

When proceeding to the next stage of the Purchase order - **Processed**, Issue Invoice button or Issue Invoice in Actions menu, becomes available.

When pressing the Issue Invoice button, Invoice is created. It contains the details from the order, but some additional details appear such as: Invoice #, Date, which corresponds to the details from the Invoice from the supplier. The Invoice from supplier, if available digitally, can be uploaded in Lapis and then related to this object

Draft		Close					
Invoice #:		Date:	11/12/2021				
Seller:	<a href="#">Supplier International</a>	Buyer:	<a href="#">PBT EU Ltd</a>				
<b>Shipping Details</b>							
Shipping Method:	Courier	Notes:					
Ship date:		Incoterms:					
Carrier:		Shipment Status:					
Tracking #:		Transfers:					
Shipping Contact:							
Properties							
Description:		Price Lists:	<a href="#">Purchase Price List cheap</a>				
Currency:	EUR	Payment Terms:	Delayed				
Payment Method:	Bank Transfer	Days:	30				
Bank Name:		Payment Status:	Not Paid				
IBAN:							
BIC:							
Relations:							
Manager:	<a href="#">Ivanka Vasileva</a>						
Containers:							
<b>Items:</b>							
Item	Quantity	Single Price	Total Net:	Discounts	VAT	Taxes	Total Gross:
<a href="#">Single Stock 1</a>	1 pc	€80.00	€80.00				€80.00
<a href="#">Service on Stock Maintenance Yearly</a>	1 year	€40.00	€40.00				€40.00

If **Chipping details** are available, they can be added as well.

**Payment status** appears here and has several options, which are visible in Edit mode via quick edit

Or via **Actions Menu/Edit**

The Invoice status can be changed, once all available details are entered.

Once Purchase Invoice is created, it is already possible to enter the stock in the warehouse, which is done by Create transfer in

Transfer - the link to object Transfer will appear there, when available. Transfer [creates stock](#) in the Warehouse in Inventory container, with the details from the Invoice. The process is described in [Inventory](#) section.

Revision #2

Created 15 November 2024 14:46:04 by Pierre

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