Purchasing and Payables Guide

Back Office | Managers, owners, and office staff

Use FlintPOS purchasing as one chain from supplier setup to purchase order, receiving, bill entry, and payment so stock, supplier balances, and reporting stay tied to the same source documents.

What This Guide Helps You Do

- Create suppliers, purchase orders, bills, and payments without splitting the workflow across tools.
- Receive inventory and handle short shipments or partial receipts on the same PO that ordered the goods.
- Keep A/P aging and vendor-spend reports tied to recorded bills and payments.

START WITH THE SUPPLIER RECORD

Supplier setup is the foundation for purchasing. Company name, contact, email, payment terms, account number, and address should be right before you issue purchase orders or enter bills.

1. **Create the supplier with real terms**
   Enter the payment terms, account number, and contact details your team uses with that vendor.
2. **Keep the supplier active only while you still buy from them**
   A clean supplier list makes PO creation and bill entry much faster.
3. **Link products to suppliers over time**
   Preferred supplier links let FlintPOS pull supplier SKU, supplier cost, and ordering unit into the PO workflow.

BUILD THE PURCHASE ORDER IN THE WIZARD ORDER FLINTPOS EXPECTS

The PO wizard runs in three stages: Supplier, Details, and Line Items. Do not skip around. The later steps depend on the earlier ones.

1. **Step 1: pick the supplier**
   Search the supplier list, choose the right vendor, and confirm the email and payment terms shown match the real account.

2. **Step 2: set the header**
   Fill in the expected date, payment terms, and notes to supplier before you add items.

3. **Step 3: add line items**
   Use product-linked lines when possible so supplier SKU, supplier cost, and unit of measure can come from the product-to-supplier link. Use manual lines only for true exceptions.

SEND THE PO ONLY WHEN THE NUMBERS ARE WORTH SENDING

A sent PO is an external document. Review quantities, unit cost, shipping expectations, and notes before you email it to the supplier.

- Use FlintPOS email for the PO so the vendor document stays tied to the order inside the system.
- Check whether the supplier-specific unit matches the way that vendor sells the item.
- If the supplier is not final, keep the PO in draft instead of sending a rough version.

RECEIVE DELIBERATELY AND DOCUMENT VARIANCES

Receiving changes stock. Record the quantities that arrived, including shortages, damage, and substitutions.

- Use partial receiving when only some of the ordered quantity arrived.
- If a line is short shipped, record the variance instead of closing the PO as if it was complete.
- Use the PO status and variance detail to separate sent, partially received, received, closed, and cancelled work.

CLOSE OR CANCEL THE PO WHEN THE SUPPLIER STORY IS FINISHED

Open purchase order reporting only stays useful if dead or finished POs are closed out on purpose.

- Close the PO when receiving is complete and no more product is expected.
- Cancel the PO when the order died and should stop appearing as outstanding work.
- Do not leave abandoned POs in sent status just because nobody came back to clean them up.

ENTER BILLS FROM THE SAME SUPPLIER AND PO TRAIL

Bills live in the payables side of Purchasing. They can be tied to a supplier and, when relevant, to a PO that was already sent or received.

1. **Select the supplier first**
   Bill entry requires a supplier and a bill date. FlintPOS can also offer matching POs for that supplier when they are in sent, partially received, received, or closed status.

2. **Enter the supplier invoice details**
   Use the supplier invoice number, bill date, due date, subtotal, tax amount, shipping cost, and notes from the real invoice.

3. **Use the bill status as an A/P signal**
   Bills move through open, partially paid, and paid states, so the list can double as a payables work queue.

RECORD PAYMENTS AND VOID MISTAKES IN FLINTPOS TOO

If you pay the supplier, record the payment date, amount, method, and reference in FlintPOS. If the payment was entered by mistake or reversed, void it there too so the bill balance stays honest.

- Payment recording defaults to the remaining amount due, which is useful for simple full-pay scenarios.
- Record partial payments in FlintPOS because the bill detail shows amount due, amount paid, and payment history together.
- Void the wrong payment from the bill detail instead of leaving the extra entry to confuse A/P aging later.

Keep Going

Use the FlintPOS Docs hub to search for related guides by role, category, or job to be done. Open the interactive walkthrough at /quickstart/purchasing.html when you want a screen-by-screen visual refresher.