Sisukord

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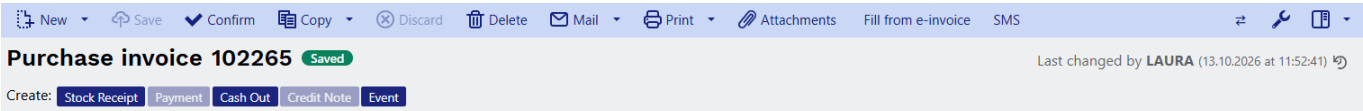
PURCHASE INVOICE BUTTONS AND FIELDS

Every user can arrange and hide the fields themselves. If you don't see a field described here, open the **Field settings** (wrench icon) of the relevant section or table, and add the field to the displayed fields.

Header buttons

On an unconfirmed purchase invoice:

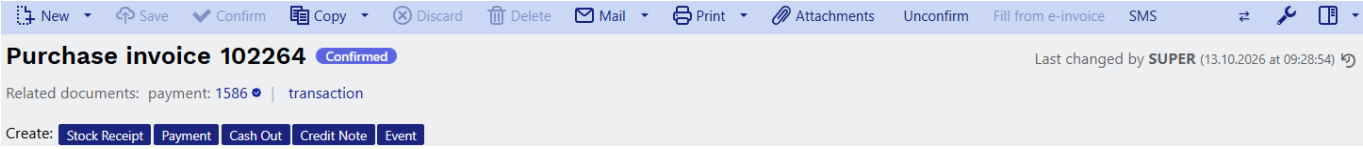


- **New** - opens a new blank document. Use the arrow next to the button to open it in a new window.
- **Save** - saves the document and applies all changes made to the draft to the original document.
- **Confirm** - confirms the document. On confirmation, a financial transaction related to the purchase invoice is created automatically.
- **Copy** - makes a copy of the document, i.e. opens a new document with most fields filled in as on the source document (the scope of copying depends on the system setting „Document copy“). The date of the copy is suggested as the date. The number series linked to the user making the copy is suggested as the number series. Use the arrow next to the button to open it in a new window.
- **Discard** - discards all changes made to the draft, deletes the draft and displays the original document again.
- **Delete** - deletes an unconfirmed document.
- **Mail** - sends the purchase invoice printout by e-mail. Use the arrow to select the printout form. If no form is selected, the default form is sent.
- **Print** - prints the document output form. Click the arrow next to the button to open the list of printouts. The arrow after each printout lets you choose whether to open a PDF or only a preview on screen.
- **Attachments** - lets you attach files to the document.
- **Fill from e-invoice** - opens the Document transport register, where you can select an e-invoice (if available) to partially fill in the purchase invoice fields.
- **SMS** - lets you send short messages directly from the document to a contact as an SMS.

Create:

- **Stock Receipt** - generates a stock receipt filled with the supplier and purchase invoice data.
- **Cash Out** - generates a cash out document based on the purchase invoice.
- **Event** - creates an event related to the purchase invoice.

On a confirmed purchase invoice:



- **Unconfirmation** -unconfirms the purchase invoice.
- **Related documents** - shows all confirmed and unconfirmed documents related to the purchase invoice, which can be opened by clicking their number.
- **transaction** - opens the financial transaction related to the purchase invoice.

Create:

- **Payment** - generates a Payment for the purchase invoice.
- **Credit Note** - generates a credit note filled in based on the purchase invoice.

Header fields

General info

- **Supplier** - supplier code, selected from the supplier register with a right-click, double-click or Ctrl+Enter.
- **Supplier name**, **VAT Reg No** - filled in from the supplier card.
- **Suppliers invoice** - the supplier's invoice number.
- **Invoice date** - document date.
- **Payment terms** - Payment term. Double-click or press Ctrl+Enter to open the list of payment terms and select a suitable one.
- **Due date** - payment due date of the purchase invoice, calculated automatically when the payment term is entered. If the due date differs from the due date in Document transport, a red exclamation mark is shown in front of Due date. Icon next to the due date opens the payment schedule
- **Op. date** - the date of the purchase invoice transaction. Filled in automatically with the invoice date.
- **Object** - object(s), i.e. financial dimension(s), related to the purchase invoice. Click the object to open its card.
- **Bank code** - if needed, double-click or press Ctrl+Enter to open the bank register.
- **Bank account/IBAN** - bank account to which the purchase invoice is paid.
- **Ref.** - reference number of the purchase invoice.
- **Payee**, **Payee name**, **Payee VAT reg no** - filled in only if the invoice is paid to a party other than the supplier.
- **Cred account** - payables account. Filled in automatically from `System settings > Supplier unpaid invoices` or from the supplier card when a payables account is set there.
- **Credited invoice** - if the purchase invoice is a credit note, i.e. generated from another purchase invoice with the Credit button, the number of the credited purchase invoice is shown here.
- **Comment**, **Int comment** - free text fields.
- **User** - automatically filled with the user who created the document. Can be overwritten or changed with a double-click. Click the user to open the user card.
- **Expense** - if the purchase invoice is related to an Expense, enter the expense number here. Double-click or press Ctrl+Enter to open the expense register and select an expense.
- **Purchase order** - number of the purchase order related to the purchase invoice.

- **VAT Date** - used if the system setting `Purchase invoice VAT has a different date` = YES. See also VAT on purchase invoices.
- **Difference from purchase order** - shows the difference between the amounts of the purchase invoice and the related purchase order.
- **JPK - designation outside KSeF**, **KSeF number**, **MPP** - fields related to Polish VAT regulations: KSeF is the Polish national e-invoicing system, JPK is the Polish standard audit file and MPP refers to the split payment mechanism. Mainly relevant on purchase invoices from Polish suppliers.
- **Markup** - displays the „Calculate sales price“ button. Enter the percentage to be added to the row amount to get the sales price and click „Calculate sales price“.
- **Stock write-off**, **Stock Price Change** -
- **S.Receipt** - number of the stock receipt related to the purchase invoice.
- **Email** - when the purchase invoice is mailed, the e-mail address is taken from here by default.
- **Project** - project code. Used to link the document to a specific project. When a project is entered, the document is shown in project reports.
- **Recl. description** - free text field for describing a reclamation.
- **Reclamation** - the amount of a payment created via the payment forecast can be reduced by the amount entered here.
- **Received** - filled in automatically with the date from the Invoice date field.
- **Origin Country** - filled in automatically from the supplier card, if set.
- **Internal Invoice** - sales invoice number, filled in automatically if the purchase invoice was generated when confirming an Internal invoice.
- **Status** - selection from the purchase invoice statuses defined in the system settings.
- **Deal type** - lets you select a suitable deal type for the purchase invoice.
- **Asset** - if the purchase invoice is related to an asset, the asset code can be entered here.
- **Type** - selection from the purchase invoice types defined in the system settings.
- **Survey** - currently designed for clients in the optics business. Can be entered with a double-click or Ctrl+Enter.

Datafields

Shows the custom datafields created for the purchase invoice. Datafields are created in the Datafields register and can be set up separately for each client and document, so the names and content of the fields depend on the user's own settings.

Currently a maximum of **7 datafields** can be displayed on the purchase invoice.

Marking datafields as **mandatory** or **recommended** (`System settings → Required fields`) does not yet work in the new purchase invoice view - this is under development.

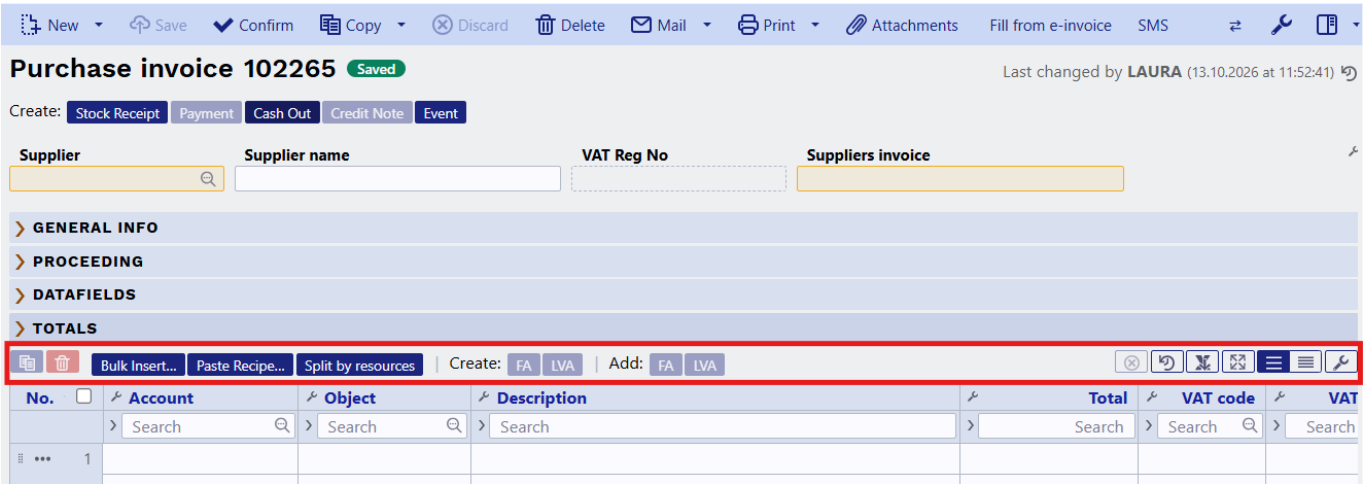
Totals

- **Currency** - invoice currency.
- **VAT total** - total VAT amount of the invoice.
- **Total** - net amount of the invoice (excl. VAT).
- **Orig. Subtotal**, **Orig. VAT** - original row amount and VAT. Filled in if VAT is partially or fully expensed.

- **Dividable sum** - filled in from the e-invoice or entered manually. If filled in, the system checks on confirmation that the dividable sum and the purchase invoice amount do not differ. The system setting „Dividable sum is also filled when creating a purchase invoice from an e-invoice“ determines whether the check and difference are calculated from the amount with or without VAT.
- **Difference** - shows the difference between the sum of the purchase invoice rows and the dividable sum. Lets you check, while filling in the purchase invoice, that the row amounts match the total payable.
- **Rounding** and the **Add to rounding** button - adds the difference between the purchase invoice and the dividable sum to the Rounding field. A rounding entry is created in the transaction on the account set as the Rounding account in the system settings.
- **Prepayment** - prepayment amount
- **Rate** - exchange rate.
- **Total** - final amount payable (incl. VAT).
- **Balance** - invoice balance.
- **Base**, **Base prepayment**, **Base VAT**, **Base balance**, **Base total** - the corresponding amounts converted into the base currency.
- **E-invoice sum**, **E-invoice total** - comparison amounts received from the e-invoice.
- **Use prepayment** - automatically selects the correct prepayments (according to the rules in the system settings) and enters the values either only in the „Prepayment“ field (prepayment ID) or also on the invoice rows (prepayment item).

Row Buttons

Above the rows table



On the right:

- **Copy selected rows** - active when rows are selected. The selected rows are copied to the clipboard and can be pasted with „Paste rows“ in the row context menu.
- **Delete selected rows** - active when rows are selected. Deletes the selected rows.
- **Bulk Insert** - lets you fill in document rows easily.
- **Paste Recipe** - lets you use a financial recipe on the purchase invoice.
- **LINK Split by resources** - splits the rows proportionally to the quantities entered on the resource.
- LINK Create: **FA, LVA** - lets you start a new fixed asset (FA) or low-value asset (LVA) document from the purchase invoice.

- LINK Add: **FA, LVA** - lets you add an additional amount to an existing fixed asset (FA) or low-value asset (LVA) document from the purchase invoice.

On the left:

- **Clear all filters** - clears all column search filters in the table.
- **Table change history** - shows the history of changes made in the table.
- **Rows to Excel** - exports the rows to Excel.
- **Enlarge table** - enlarges the table and hides the header fields.
- **Table density: sparce**, **Table density: compact** - lets you choose whether table rows are displayed more densely or more loosely.
- **Table settings** - lets you choose which fields are displayed in the table and change their order.

Row fields

Use the wrench icon in the rows table to choose which columns are visible:

- **Account** - selected from the chart of accounts with a double-click or Ctrl+Enter; the account number is entered.
- **Object** - an object or a comma-separated list of objects. Double-click or press Ctrl+Enter to open the list of objects.
- **Project** - project code. Double-click or press Ctrl+Enter to open the list of projects.
- **User** - selection from the users table; the code is entered.
- **Descr.** - shows the account name, can be overwritten.
- **Total** - net amount of the purchase invoice row.
- **VAT c.** - VAT code.
- **VAT** - VAT amount, calculated when the VAT code is selected.
- **Qty** - quantity, transferred to the financial transaction.
- **Type** - expense type selection.
- **Item** - item code, selected with a double-click or Ctrl+Enter.
- **Contract** - contract code.
- **SN** - serial number, filled in when a prepayment item is used.
- **OID item**, **OID document**, **OID name** - additional fields related to the purchase ID.
- **Customer** - double-click or press Ctrl+Enter to select a customer (for creating sales invoices from resources).
- **Invoice No** - double-click or press Ctrl+Enter to select an invoice.
- **From resrc.** - resource code.
- **Resource** - resource code.
- **Int comment** - text field.
- LINK **start** - periodization start date. Right-click to open the calendar.
- **end** - periodization end date. Right-click to open the calendar.
- LINK **Abort date** - periodization termination date. The field appears on a confirmed document that uses automatic accruals.
- **Abort amount** - amount returned after the periodization is terminated. The field appears on a confirmed document that uses automatic accruals.
- **Abort account** - account to which the remaining periodization amount is posted. Filled in automatically if the system setting `Automatic Purchase Invoice Periodization Abort Account` is filled; can be changed on the document regardless. The field appears on a confirmed document that uses automatic accruals.
- LINK **Abort object** - selection from the objects table. The field appears on a confirmed

document that uses automatic accruals.
- **Abort project** - selection from the projects table. The field appears on a confirmed document that uses automatic accruals.
- **WIP** - checkbox.
- **Corr.object** - object of the accrued amount; select with a double-click or Ctrl+Enter. If filled in, Corr.object is placed on the expense account row of the transaction. Allows different objects to be used on the corresponding balance sheet account and the expense account.
- **Corr.project** - project of the accrued amount; select with a double-click or Ctrl+Enter. If filled in, Corr.project is placed on the expense account row of the transaction. Allows different projects to be used on the corresponding balance sheet account and the expense account.
- **S.Receipt** - stock receipt number.
- **Suppliers invoice** - invoice number.
- **Expense** - lets you link the purchase invoice row to an expense with a double-click.
- **Sales Price** - related to the „Calculate sales price“ button.
- **Asset** - code of the fixed asset or low-value asset created from the purchase invoice row or to which an additional amount was added.
- **Asset action** - name of the asset action (e.g. „Purchase“, „Additional amount“).
- **Constant1-4**, **Text1-4** - free fields.
- **Unit** - unit of measure of the item.

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