Find and Add Purchase Items

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Overview

This guide will help you add the correct item, unit, variant, batch, serial, and quantity to a purchase.

The item becomes a purchase line ready for costing, tax, and document posting.

Who can do this

You need access to Purchase entry and access to the selected item/location masters.

Before you start

Have the item name/code/barcode, received unit and quantity, variant, batch/serial, expiry, and location.

> Before saving, check that the correct company is open and that you have permission to complete this task.

Where to find it

Open Purchase or the needed receipt form and use its item-entry grid.

Find and Add Purchase Items

Step 1: Search by item code, barcode, or name

Step 2: Confirm the exact item and variant

Step 3: Select the purchase unit and verify conversion to base unit

Step 4: Enter received quantity

Step 5: Enter or select batch, expiry, and serial numbers when controlled

Step 6: Select receiving location

Step 7: Confirm the line description and totals before moving on

Check your work

Match every line to the physical receipt and supplier invoice, including unit conversions and record history identifiers.

> Take a moment to check your work before closing the window. This small check can save time later.

If something goes wrong

- Stop if the intended variant or unit is unavailable.
- Never substitute a similar item merely to complete entry.

Related guides

- Create a Purchase
- Allocate Purchase Discount, Tax, Cost, and Location
- Update an Item Safely

What to do next

Create a Purchase.

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