
trytond_purchase

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The *Purchase Module* provides everything that is required to create and manage purchases made by the company. It adds the idea of a purchase to Tryton, and allows it to be tracked as it moves through various states from draft to done. It makes it easy to create supplier shipments for the purchase, and includes the ability to automatically create related supplier invoices.

Settings, information and tasks relating to purchases can be found under the [*Purchase*] main menu item.

1.1 Listing Suppliers

In Tryton, by definition, the *Parties* that your *Company* has bought from are its suppliers. The *Purchase Module* lets you list these when you open the [*Party* → *Parties* → *Parties associated to Purchases*] main menu item.

Tip: For some companies it is important to know which parties are, or may eventually be, suppliers before you have bought anything from them. One way of doing this is to create a *Supplier Category*, and add all the appropriate parties to it.

1.2 Making products purchasable

Before you can add a *Product* to a *Purchase* it must be marked as purchasable. When you do this you will also be able to set some additional properties such as the *Unit of Measure* the product is normally bought in, and which suppliers are used and their details about the product.

1.3 Setting bulk prices

Suppliers may offer different prices depending on how much of a *Product* is purchased. In Tryton you can record these prices using the *Product Supplier* concept.

Tip: You can set these prices by opening one of the *Suppliers* lines shown when viewing a product's details.

Note: To ensure the correct price is chosen when entering in a *Purchase* you must ensure that the prices are ordered correctly. The lowest quantity must appear first, going up to the largest quantity last.

This is because Tryton searches through the price lines in *Sequence* order, and uses the last price it finds where the ordered quantity is equal to, or more than, the price line's quantity.

1.4 Creating a purchase order

Creating a new purchase order is simply a matter of creating a new *Purchase* and adding the lines that are required. Most of the fields are optional or have sensible default values.

Tip: Product prices are automatically converted to the *Currency* used on the purchase. To keep the prices fixed when ordering in a foreign currency set the currency and prices in the *Product's* list of *Product Suppliers*.

Tip: The purchase's reference field is intended to be used to keep track of the supplier's reference for the purchase. This can be filled in at any time, even when the purchase is done.

1.5 Changing a purchase order

To be able to change most of the values in the fields on a *Purchase* the purchase must be in a draft state.

There are also a few fields, such as the *Party* and *Currency*, which become read-only when any lines are added to the order. To be able to change these without needing to remove the lines from the purchase you can use the *Modify Header* button to start the *Modify Header* wizard.

1.6 Receiving a shipment

Goods that are bought as part of a *Purchase* are received from the supplier using a *Supplier Shipment*.

Suppliers sometimes send a single order on multiple different shipments, or group several orders together into a single shipment. As it is not possible to know how a supplier will ship products the *Purchase Module* does not automatically create any supplier shipments for you.

A purchase does, however, create draft *Stock Moves* for any goods or assets that have been purchased. Once you receive the information about what's been shipped you create a new supplier shipment and add these moves to it.

If not all the stock has been sent, then new stock moves are automatically created for any remaining quantities when the shipment is received, or the purchase gets processed again. These can be added to later shipments, split up further, or cancelled.

Tip: The supplier shipments that are related to the purchase can be found using the purchase's *Shipments* link.

The *Shipments* and stock *Moves* related to a purchase can also be found using the items in the purchase's *Open related records* menu.

1.7 Getting invoiced

The *Purchase's* invoice method determines whether the purchase will automatically generate draft *Invoices*.

When you receive the invoice from the supplier you can then find the draft supplier invoice and check it for any discrepancies, before validating or posting it.

Tip: The supplier invoices that are related to the purchase can be found using the purchase's *Invoices* link, or the *Invoices* item found in the sale's *Open related records* menu.

1.8 Handling shipment and invoice exceptions

Sometimes you may cancel *Stock Moves* or *Invoices* that are related to a *Purchase*. You may have done this because you no longer need these items, or you may now need to recreate them. As Tryton does not know if a cancelled item needs to be recreated, or not, it shows this as an exception in the purchase's shipment or invoice state.

For purchases that have a shipment or invoice exception you can use the *Handle Shipment Exception* or *Handle Invoice Exception* wizards to recreate the items that need recreating, and ignore the rest.

Tip: When using the wizard the moves and invoices to recreate will, by default, already be selected. This means you will need to deselect any that you do not want to recreate.

1.9 Finishing a purchase

In Tryton once a *Purchase* is being processed there is no button that moves the purchase into a done state. This will happen automatically once the purchase's *Shipments* and *Invoices* are completed.

1.10 Cancelling purchases

You can easily cancel *Purchases* that are not yet confirmed using the *Cancel* button.

Confirmed purchases cannot be cancelled, but you can put them back to a state where they can be cancelled. However, as soon as a confirmed purchase starts to be processed it can no longer be cancelled. This may happen immediately when it is confirmed, or after a delay if one has been correctly *Configured*.

Once a purchase has started to be processed, to effectively cancel the purchase, you must cancel its *Stock Moves* and *Invoices*. Once you have done this you must *handle the exceptions*, ensuring that none of the moves or invoices are selected for recreation.

1.11 Returning purchases

There may be times when you need to send a *Purchase*, or part of a purchase, back to the supplier. In Tryton this is represented by a purchase that has negative quantities.

One way of creating a supplier return is to select the purchases that you want to return and then use the *Return Purchase* wizard. This creates a draft return purchase for the whole of the selected purchase.

If only part of the purchase is being returned, then the return purchase can be altered as required. When it gets processed it will automatically create *Credit Notes* and *Supplier Return Shipments* where required.

Note: When processing the return shipment, if the *Warehouse* has a supplier return *Location* the returned stock will be taken from that location. Otherwise the stock will be picked from the warehouse's storage location.

The *Purchase Module* introduces some new concepts and updates existing concepts to make them work seamlessly with purchases.

2.1 Purchase

The *Purchase* is used to manage the purchasing process. Each purchase, at any time, can be in one of several different states. A purchase progresses through these states until eventually it is either done or gets cancelled. When some of these state changes happen the *Employee* that triggered the state change is also recorded.

Details are stored about the *Company* making the purchase and any other *Parties*, *Contact Mechanisms* and *Addresses* that relate to it, such as the supplier, the contact at the supplier or the party that is sending the *Invoice*.

A purchase is identified by a unique number that is generated automatically from the configured *Sequence* and may also have other general information such as the purchase date, a description, or a reference provided by the supplier.

Each purchase is made up from one or more lines. These lines can be put into a particular order if desired. Normally most lines on a purchase provide information about which *Products* or items are required. Informational lines can also be added for things like titles, comments or subtotals.

The total, untaxed, and tax amounts for a purchase are derived from the amounts, prices and *Taxes* of the purchase's lines.

A destination *Warehouse* is required for purchases of physical items such as goods or assets. The purchase will automatically create *Stock Moves* for these products. These stock moves are linked to the purchase's lines and must be recreated or ignored if they get cancelled.

Invoices relating to the purchase may be created, depending on which invoice method is selected. These invoices are based on the details from the purchase, and must be recreated or ignored if they get cancelled.

See also:

Purchases can be found by opening the main menu item:

Purchase → *Purchases* menu item.

2.1.1 Reports

Purchase Report

The *Purchase Report* provides a purchase order that can be sent to the supplier when making a purchase. It includes all the relevant information from the selected purchases.

2.1.2 Wizards

Handle Shipment Exception

The *Handle Shipment Exception* wizard helps the user ensure the purchase has the correct [Stock Moves](#) associated with it. For stock moves that have been cancelled, it lets the user decide which should be re-created, and which should be ignored.

Handle Invoice Exception

The *Handle Invoice Exception* wizard helps the user make sure the purchase only has the appropriate [Invoices](#) associated with it. If any of the purchase's invoices get cancelled this wizard provides the user with the option to re-create or ignore the cancelled invoice.

Modify Header

Some fields on a draft purchase become read-only when lines are added to it. The *Modify Header* wizard allows the values in these fields to be safely updated.

Return Purchase

The *Return Purchase* wizard is used when a purchase needs to be sent back. It creates new draft purchases that match any selected purchases, but with all the quantities negated.

2.2 Product Supplier

The *Product Supplier* concept links together a [Product](#) with a [Party](#) that acts as a supplier. The product can be either a [Product Template](#) or one of its [Variants](#). Each [Company](#) has their own list of product suppliers.

A supplier's product name and code, and a lead time can be defined for each combination of products and suppliers. Also different purchase prices can be set for different minimum order quantities.

See also:

A list of products and their suppliers can be found by opening the main menu item:

Product → *Product Suppliers*

2.3 Configuration

The *Purchase Configuration* concept is used to store the settings that affect the general behaviour and default values for purchase related activities.

Note: Some of the purchase configuration options have no effect unless the [Task Queue](#) has been setup and some workers are running.

See also:

Purchase configuration settings are found by opening the main menu item:

Purchase → Configuration → Purchase Configuration