Enter a bill, quote or order

Not available in AccountRight Basics

Just bought something, or received a bill for electricity or another expense? To help you keep track of when it's due, record it in AccountRight.

And don't worry, if you make a mistake (like entering the wrong amount or double-entering it), you can edit or delete it later (so long as your security settings allow it).

For a quicker way to create a bill, add your supplier invoices to the AccountRight **In Tray**. Using AccountRight Basics? Enter your expenses using Spend Money transactions.

To enter a purchase

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1. Go to the **Purchases** command centre and click **Enter Purchases**.
2. Select the supplier, or add a card for them. Note that you can't change the card once you've recorded the purchase, so make sure you select the correct card.


3. Are the credit terms right? Click the **Terms** arrow to change the supplier's default credit terms for this purchase only.

4. If you're entering prices that include tax or GST, select the **Tax Inclusive** (Australia) or **GST Inclusive** (New Zealand) option. The selection you make will be remembered for your next purchase. Don't change this setting after you start entering amounts.

5. The **Purchase No.** field shows the next available number. If you click in the **Purchase No.** field, **Auto #** appears to confirm that the number has been automatically selected for you. You can type a different number into the field if you want. Subsequent purchase numbers will then increment from the new number. If your purchase number includes letters, the letters won't automatically appear in subsequent purchase numbers (you'll need to enter these each time).

You might want to use the preferences below to have more control over your purchase numbers.

- to prevent duplicate purchase numbers being used (**Setup** > **Preferences** > **Purchase**> **Warn for Duplicate...Numbers on Recorded Purchases**).
- to keep the same purchase number when converting a quote or order to an invoice (**Setup** > **Preferences** > **Purchases**> **Retain Original PO Number when Changing a Purchase between Quotes, Orders or Bills**).

6. Want to change the purchase layout to suit the type of goods or services you're purchasing? Click **Layout**. Note that purchases using the **Miscellaneous** layout can't be printed or emailed.

Set a default puchase layout
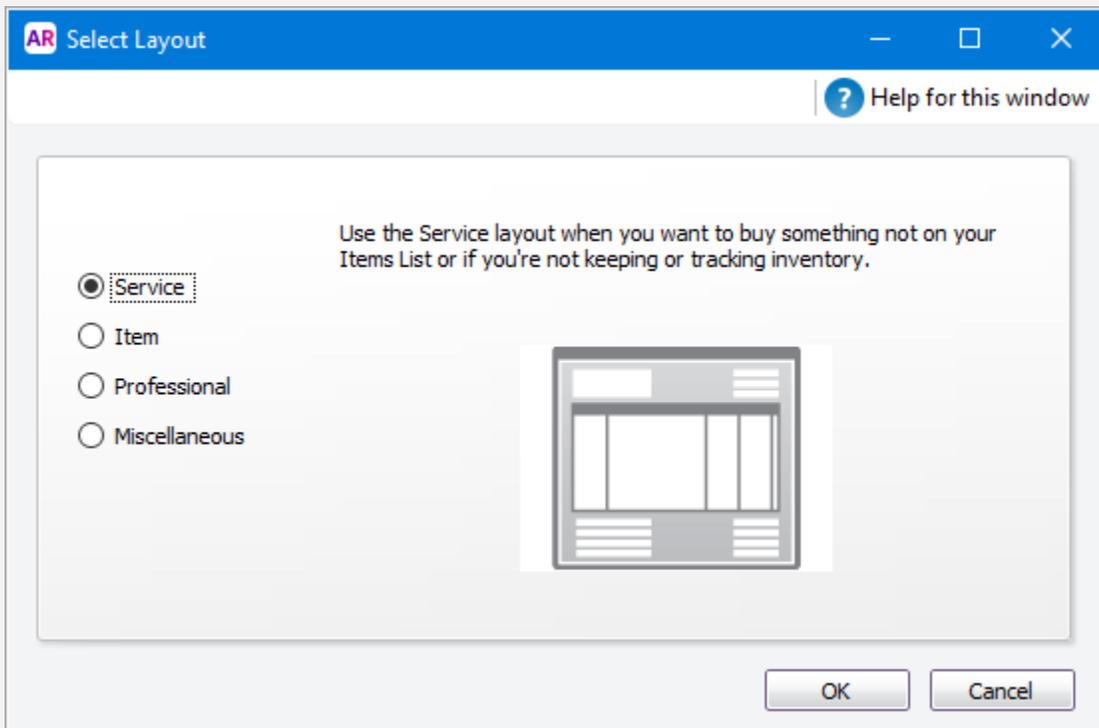
Use the the Purchases Easy Setup Assistant to set a default purchase layout. You can override this selection in the **Buying Details** tab of the supplier's card.

7. Select whether you're recording a **quote**, **order** or **Receive Items** (Not Basics), or **bill** from the **Purchase Type** list in the top-left corner. The Receive Items option only appears for the Item purchase layout. If you record a quote or order, you can change the purchase type later when the status of the purchase changes.
8. Enter details of what you're buying, as well as headings, subtotals and blank lines. The fields that are available depend on

the purchase type and layout you've selected.

Need to remove a line? Right-click it and choose **Delete Line**.

Item purchase fields

Service, Professional, and Miscellaneous purchase fields

9. Enter any charges for **Freight**, and if required, select the right **Tax/GST** code. If you can't enter **Freight**, make sure you've specified a linked account for freight.

> ### Calculated tax/GST
>
> Click the zoom arrow next to the **Tax** / **GST** field to view or change the tax (Australia) or GST (New Zealand) amounts assigned to the purchase. Be aware that changes to a transaction's calculated tax/GST won't be reflected in BASlink or GST Return calculations.

10. Enter an amount in the **Paid Today** field to record the amount you've paid at the time of the purchase. If you are creating an order, record the amount you gave you as a deposit.

11. Enter any additional purchases information:

Field	Description
Comment	A comment you want the supplier to see on the purchase form
Ship Via	The method the purchase will be shipped to you
You can set up a default list of comments and shipping methods, that can be selected when recording purchases. See Sales and purchases information.	
Promised Date	The date you expect delivery
Journal Memo	A description of the purchase that will appear in the journal entry for it
Bill Delivery	Select whether you want to print or email the form later, or if you don't want to print or email it, select **Already Printed or Sent**

12. Click **Record** (or **Save Quote** for quotes) to just save the purchase, or click **Print** to also print a form. If you want to email the purchase or save it as a PDF (not available for Miscellaneous purchases), click **Send To**.

Do you regularly record similar purchases? Save time by saving the purchase as a

recurring transaction.

Entering bills FAQs

What is the Supplier Inv No. field used for?

Can I display tax/GST on each line of a purchase?

How do I record a note about the purchase?

How do I edit the list of comments and shipping methods?

Why is the item number blank when I print purchases?

Why does the freight amount disappear after I enter it?

How do I turn automatic spell checking off or on?

Related topics
Entering purchases
Print or email purchases
Changing a bill, quote or order
Deleting a bill, quote or order
Paying bills
Working with In Tray documents
Adding a supplier
Changing the purchase type
Supplier returns, debits, and refunds

From the community

Prompts to email when recording a Bill
cannot open invoices in purchases
Can't enter freight costs on purchase
Delete Duplicate Electronic Payment
Purchase and Disposal of Comapny vehicle
REECE LINK TO MYOB FOR PURCHASE INVOICES NOT COMING THROUGH SINCE 1/1/2020
Purchase orders with no inventory
Account Right - Delete Purchase
AR 2019.3 Stock Alert List - negative On Order quantities
Purchases Register 2019.4 Attachment Icon not displaying

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