

Purchasing: Procure-to-Pay Walkthrough

A practical step-by-step scenario for Buyers and Procurement Officers — from raising a Purchase Request all the way through supplier payment.



Before You Begin



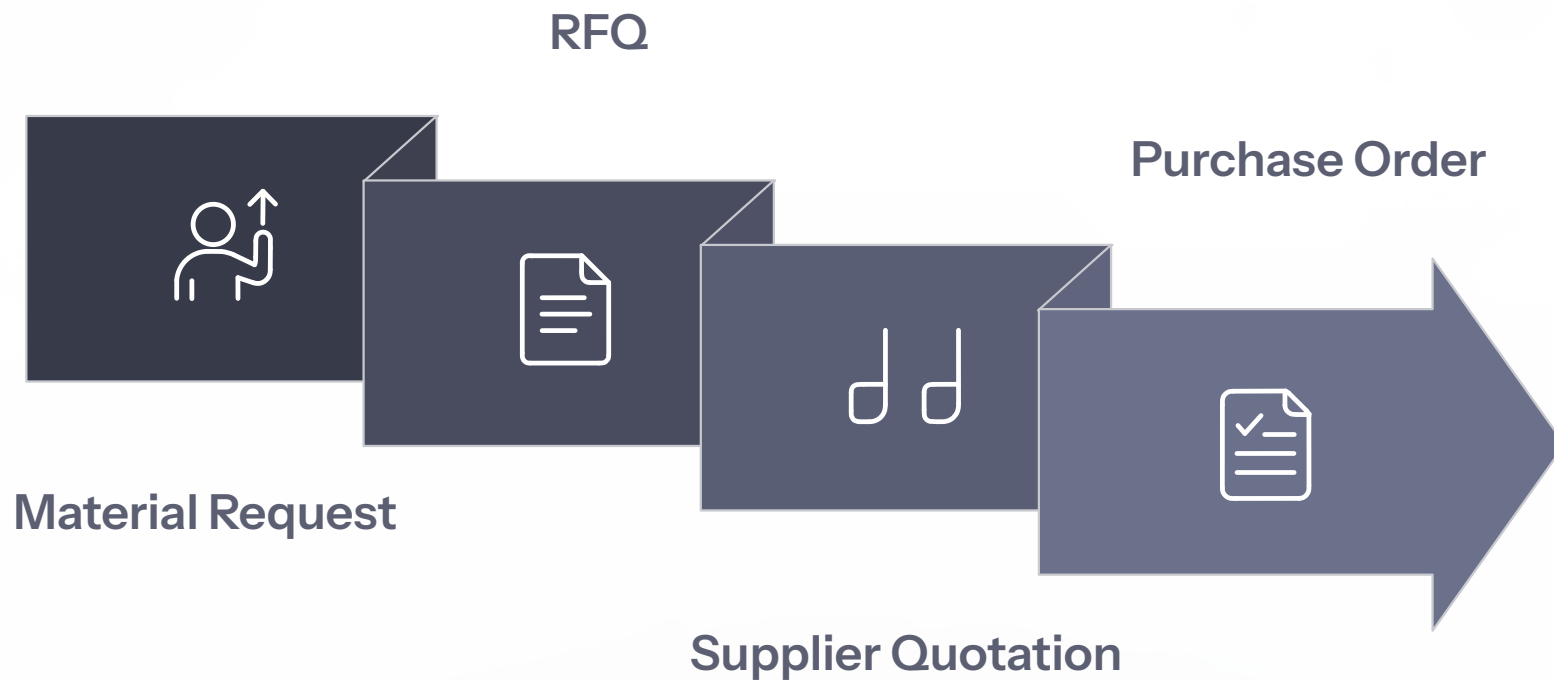
Role

Buyer / Procurement Officer

Preconditions

- Supplier master exists (or create one)
- Items exist with purchase UOM; warehouses configured
- Access to: Material Request, RFQ, Supplier Quotation, Purchase Order, Purchase Receipt, Purchase Invoice

The Full Procure-to-Pay Flow



Each stage builds on the last, creating full traceability from initial request to final payment.

Step 1 — Open Purchasing Workspace

Action

Navigate to the **Buying** (**Purchasing**) workspace.

Expected Output

Purchasing KPIs, shortcuts, and recent transactions appear.

Screenshot

PURCHASE_01_WORKSPACE.png



Steps 2 & 3 — Request & RFQ

1

Create Material Request

Open Material Request → New. Set **Type = Purchase**, add items, qty, required-by date → Save → Submit.

Output: Purchase requirement recorded.

PURCHASE_02_MR_SUBMITTED.png

2

Create RFQ

From Material Request → **Make** → **Request for Quotation**.
Select suppliers, confirm items → Save → Submit.

Output: RFQ ready to email/print to suppliers.

PURCHASE_03_RFQ_SUBMITTED.png

Steps 4 & 5 — Quotation & Supplier Selection



Record Supplier Quotation

Open Supplier Quotation → New. Link to RFQ, enter prices and validity date → Save → Submit.

Output: Supplier quotation captured for comparison.

PURCHASE_04_SUPPLIER_QUOTATION_SUBMITTED.png

Compare & Select Supplier

Use RFQ comparison tool or evaluate quotations manually to choose the best supplier and final pricing.

PURCHASE_05_QUOTATION_COMPARISON.png

Step 6 — Create Purchase Order

Action

From Supplier Quotation (or RFQ) → **Make** → **Purchase Order**. Confirm schedule date, warehouse, taxes → Save → Submit.

Expected Output

Purchase Order issued to supplier.

Screenshot

PURCHASE_06_PO_SUBMITTED.png



Steps 7 & 8 — Receive Goods & Record Invoice

1

Purchase Receipt

From Purchase Order → **Make** → **Purchase Receipt**.
Confirm warehouse and received qty → Save → Submit.

Output: Stock increases; receipt posted.

PURCHASE_07_PURCHASE_RECEIPT_SUBMITTED.png

2

Purchase Invoice

From PO or Receipt → **Make** → **Purchase Invoice**. Verify
taxes, due date → Save → Submit.

Output: AP posted; outstanding payable calculated.

PURCHASE_08_PURCHASE_INVOICE_SUBMITTED.png

Step 9 — Pay Supplier (*Optional*)



Action

Create **Payment Entry** → select supplier and invoice → Submit.

Expected Output

Payable reduced or cleared; GL entries created.

Screenshot

PURCHASE_09_PAYMENT_ENTRY_SUBMIT
TED.png

What You've Achieved

A complete procure-to-pay cycle with full traceability:

1

Request

Material Request

2

Source

RFQ → Supplier Quote

3

Order

Purchase Order

4

Receive

Purchase Receipt

5

Pay

Invoice → Payment