

How to review a purchase before saving

In this guide: Catch quantity, serial, cost, and payment mistakes before inventory is updated.

Review checklist

1. Confirm the receiving location.
2. Confirm the vendor when one should be tracked.
3. Compare the Reference Number with the vendor invoice.
4. Match every purchase line to the merchandise received.
5. For itemized products, verify quantity and cost per unit.
6. For serialized products, match every IMEI or serial number to a physical device and verify its individual cost.
7. Compare the purchase total with the invoice total.
8. Choose the correct payment source and method, or confirm that the balance should remain due.
9. Save the purchase once.

If the save result is uncertain

Keep the draft on screen and check the Purchase List before trying again. Re-submitting an unconfirmed purchase can create duplicate inventory and payment records.

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