Purchasing and Payables

- Automatic Restock to Replenished Inventory
- Purchase to Pay

Automatic Restock to Replenished Inventory

This workflow turns maintained warehouse reorder settings into reviewed purchase orders, a partial receipt, and an updated inventory position. It begins with item and vendor setup and ends when purchasing and receiving can explain what Brisk suggested, what staff approved, what arrived, and what remains open.

> **Demonstration notice:** All vendors, items, quantities, identifiers, costs, and transactions are fictional. The documentation run creates controlled draft records and sends nothing to a vendor.

Workflow at a glance

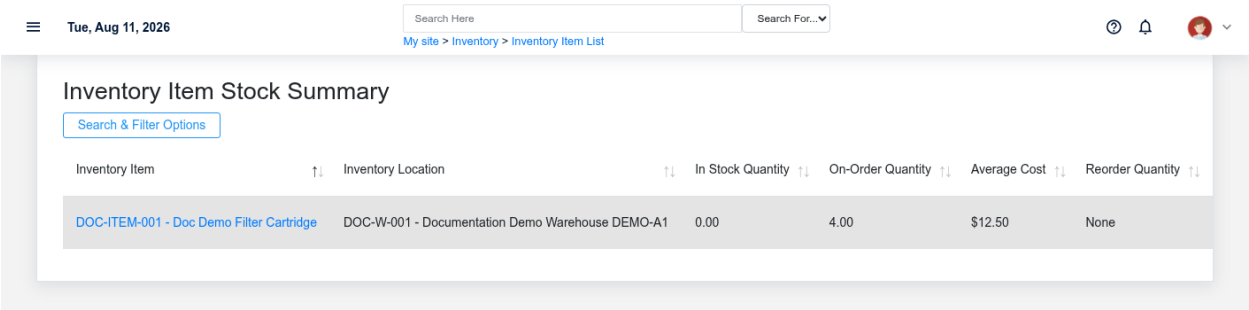
Outcome	Reviewed purchasing work and a traceable partial or complete receipt
Starts with	Maintained warehouse reorder and vendor settings
Ends with	Current stock plus visible received and open quantities
Primary roles	Inventory manager, buyer, receiving clerk
Brisk areas involved	Inventory, Restock, Purchase Orders, Receiving
Common businesses	Feed/supply, parts, equipment, retail
Approximate handoffs	Two

Why this workflow matters

Reorder settings are useful only when they become reviewable work. Brisk considers warehouse stock and incomplete purchase quantities, groups qualifying items by vendor, and creates draft orders rather than silently sending purchases.

Receiving continues from those orders. Staff can distinguish what was ordered, received, and still outstanding before accounting handles the vendor invoice.

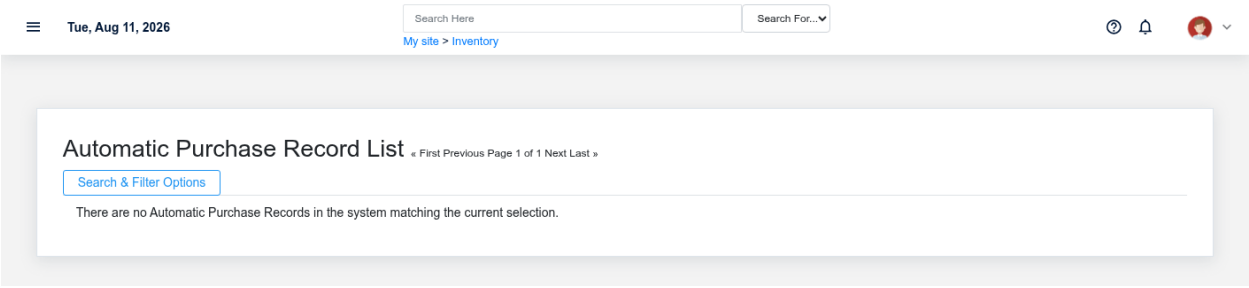
Before you begin



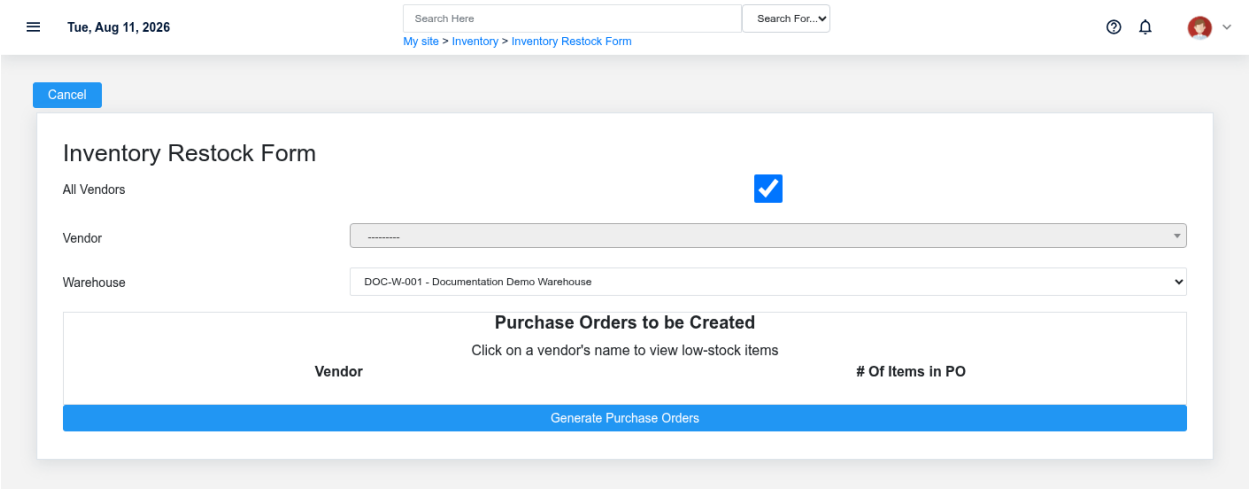
Current purchase quantity, reorder level, maximum, and open purchasing context drive the restock decision.

- Required: stocked Inventory or Manufactured items, warehouse reorder/maximum quantities, primary vendors, units, and costs.
- Required: permission to run Restock, review Purchases, and create Receipts.
- Review incomplete purchase rows and known outside-Brisk orders before another run.
- Vendor minimums, pack sizes, lead times, and seasonal judgment remain human checks.

End-to-end steps



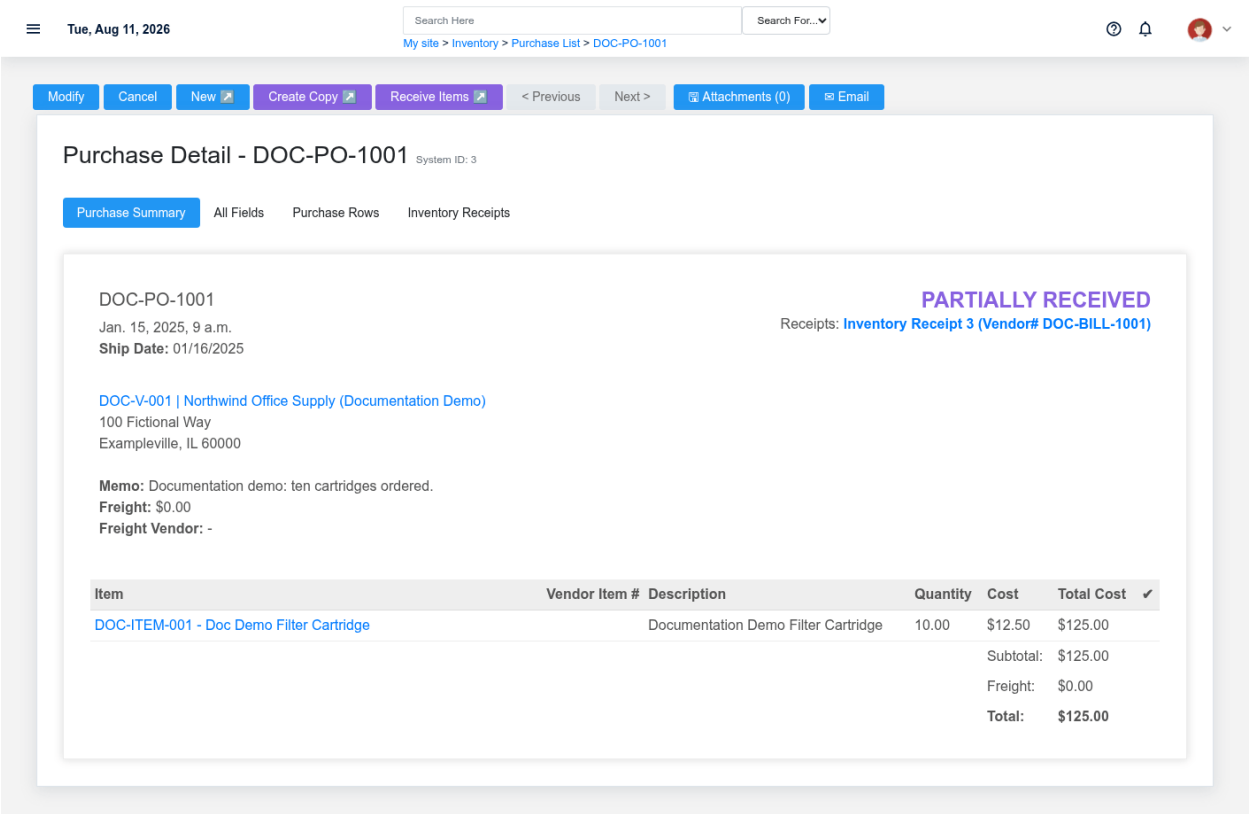
The automatic-purchase record preserves evidence that the draft orders came from a restock run.



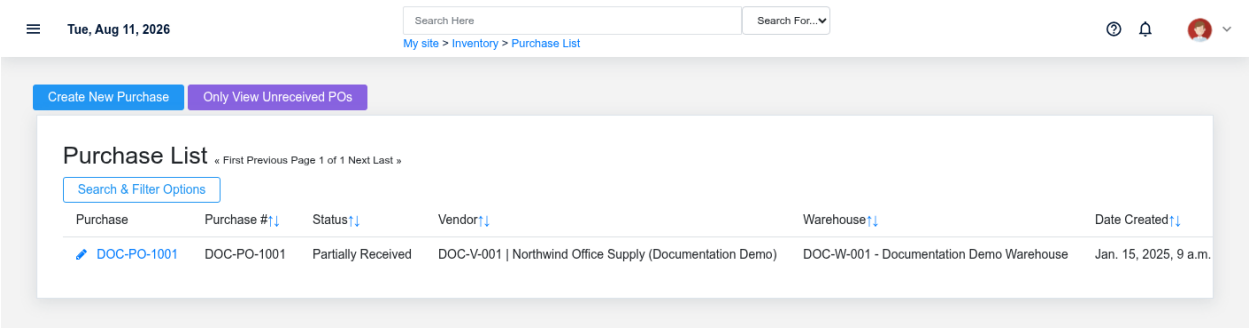
Run restock for one intended warehouse and review the qualifying item/vendor setup first.

1. **Inventory manager — review setup.** Open the Inventory Item and verify vendor assignment, current purchase quantity, reorder quantity, maximum quantity, unit, and cost for warehouse DOC-W-001.
2. **Buyer — run Restock once.** Open Restock Form, choose the intended warehouse and vendor scope, then submit.
3. **Brisk — calculate suggestions.** Inventory and Manufactured items qualify when current purchase quantity plus incomplete purchase-order quantity is at or below the reorder quantity. Suggested quantity fills toward maximum after subtracting stock already in the purchasing pipeline; missing or non-positive maximum setup is skipped.
4. **Buyer — review generated work.** Open the Automatic Purchase Record and each separate draft Purchase Order created per vendor. Correct quantity, cost, unit, date, pack, and vendor minimum before submission.
5. **Authorized buyer — submit the intended order.** Submission does not mean the vendor received an external message unless that separate configured action occurred.
6. **Receiving clerk — record what arrived.** Create an Inventory Receipt from the order. DOC-PO-1001 shows six of ten cartridges received, so its status is Partially Received and four remain open.
7. **Inventory manager — verify.** Review stock summary, receipt quantity, purchase status, and open pipeline. Continue with Purchase to Pay for the vendor invoice and payment.

What Brisk keeps connected



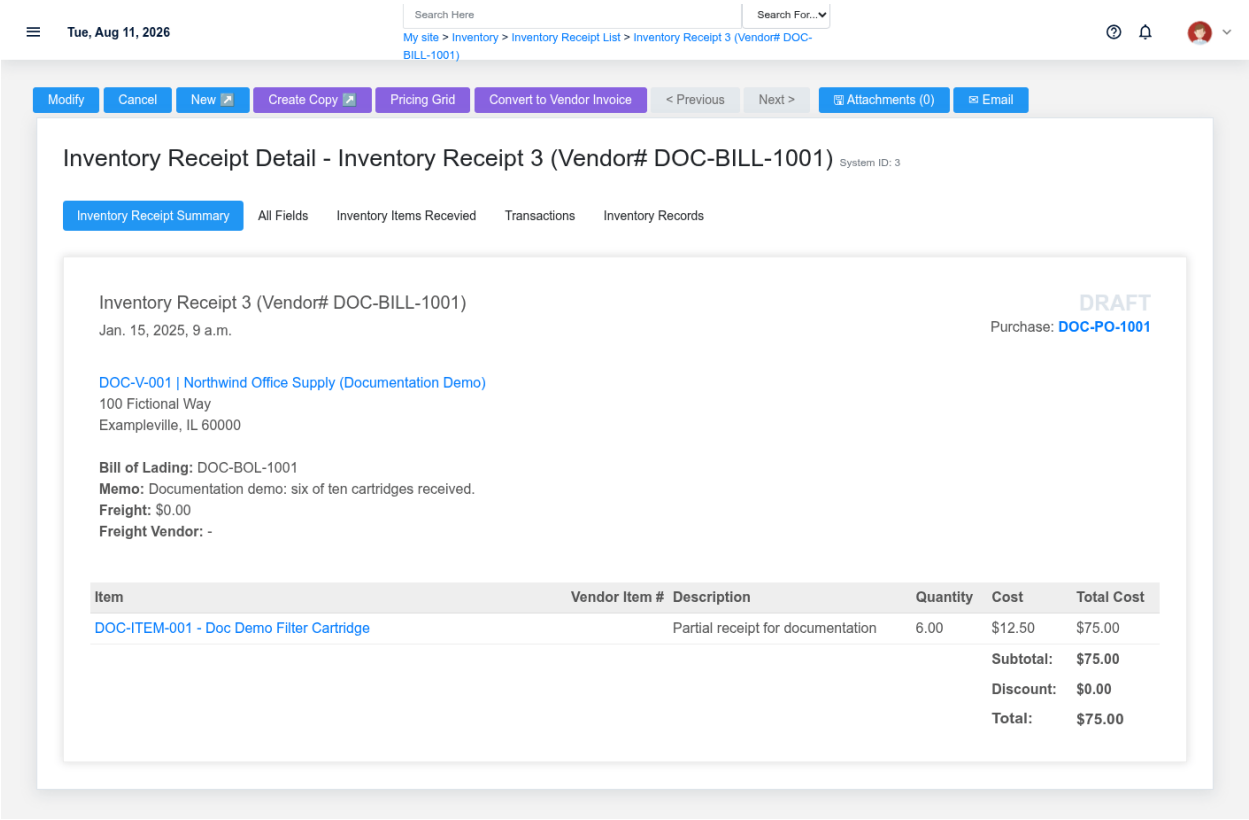
A partial receipt keeps the remaining order quantity visible in the purchasing pipeline.



Brisk separates qualifying items by vendor into draft purchase orders for human review.

Action	Result or downstream record	Where to verify it
Run Restock	Automatic-purchase record and draft orders by vendor	Automatic Purchase Records and Purchases
Review/submit order	Approved vendor, warehouse, rows, quantities and costs	Purchase detail
Receive delivered quantity	Receipt rows linked to purchase rows	Inventory Receipt detail
Process partial receipt	Partially Received purchase with remaining quantity	Purchase detail and stock summary

Handoffs and controls



Receiving records what physically arrived; it does not assume the full purchase order was delivered.

Inventory owns reorder setup, the buyer owns commercial review, and receiving owns physical quantity evidence. Draft, Submitted, Partially Received, and Received matter. The purchase order is the source for ordered quantity; the receipt is the source for what arrived.

Exceptions and safe corrections

- Item missing from Restock: inspect vendor, type, warehouse quantities, maximum, and open rows.
- Suggestion looks too large: check UOM, current stock, incomplete orders, and outside-Brisk purchases before editing.
- Wrong vendor or pack: correct the draft Purchase before submission.
- Partial or damaged delivery: receive only accepted quantity and retain the remaining exception.
- Duplicate run uncertainty: inspect Automatic Purchase Records and draft Purchases before running again.

Related documentation

Start here

- Inventory Items
- Restock Form

Continue with

- Automatic Purchase Records
- Purchase Orders
- Inventory Receipts

Related controls and reports

- Purchase to Pay
- Inventory

Could Brisk Simplify This Process for Your Team?

See how this workflow could be configured around your records, permissions, approvals, and reporting requirements.

Request a focused Brisk demonstration

Purchase to Pay

This workflow follows an inventory purchase from an approved order through a partial receipt, vendor invoice, and allocated payment. Vendor, warehouse, item, quantity, cost, receipt, obligation, and payment evidence remain connected so purchasing, receiving, and accounting can review the same chain without re-entering it.

Demonstration scenario

> **Demonstration notice:** Every vendor, item, identifier, amount, bank reference, and transaction is fictional. Documentation fixtures persist safe states without sending purchase orders, issuing payments, or contacting external systems.

Workflow at a glance

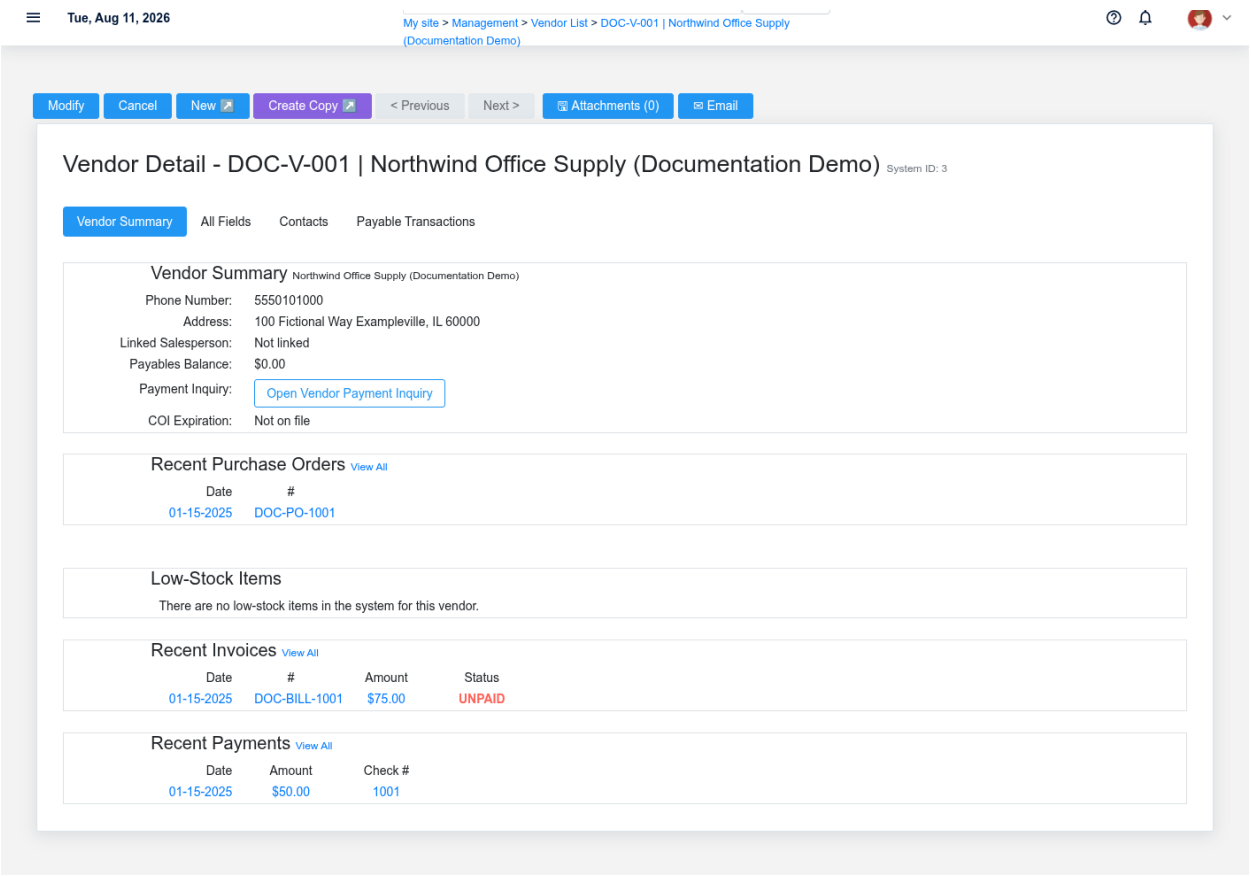
Outcome	Received inventory, supported vendor obligation, and traceable payment application
Starts with	Reviewed vendor, item, warehouse, and purchase need
Ends with	Payment allocation plus any visible remaining amount
Primary roles	Buyer, receiving clerk, accounts-payable clerk
Brisk areas involved	Vendors, Purchase Orders, Receiving, Vendor Invoices, Payments
Common businesses	Retail, feed/supply, parts, equipment, wholesale
Approximate handoffs	Three

Why this workflow matters

Purchasing staff know what was ordered, receiving knows what arrived, and accounting sees what the vendor billed. Keeping those records linked makes partial delivery, cost, freight, invoice, and payment differences visible rather than burying them in a single payable total.

Each status marks a real control point. A submitted order is not a receipt, a receipt is not a verified vendor invoice, and an allocated partial payment does not make the invoice fully paid.

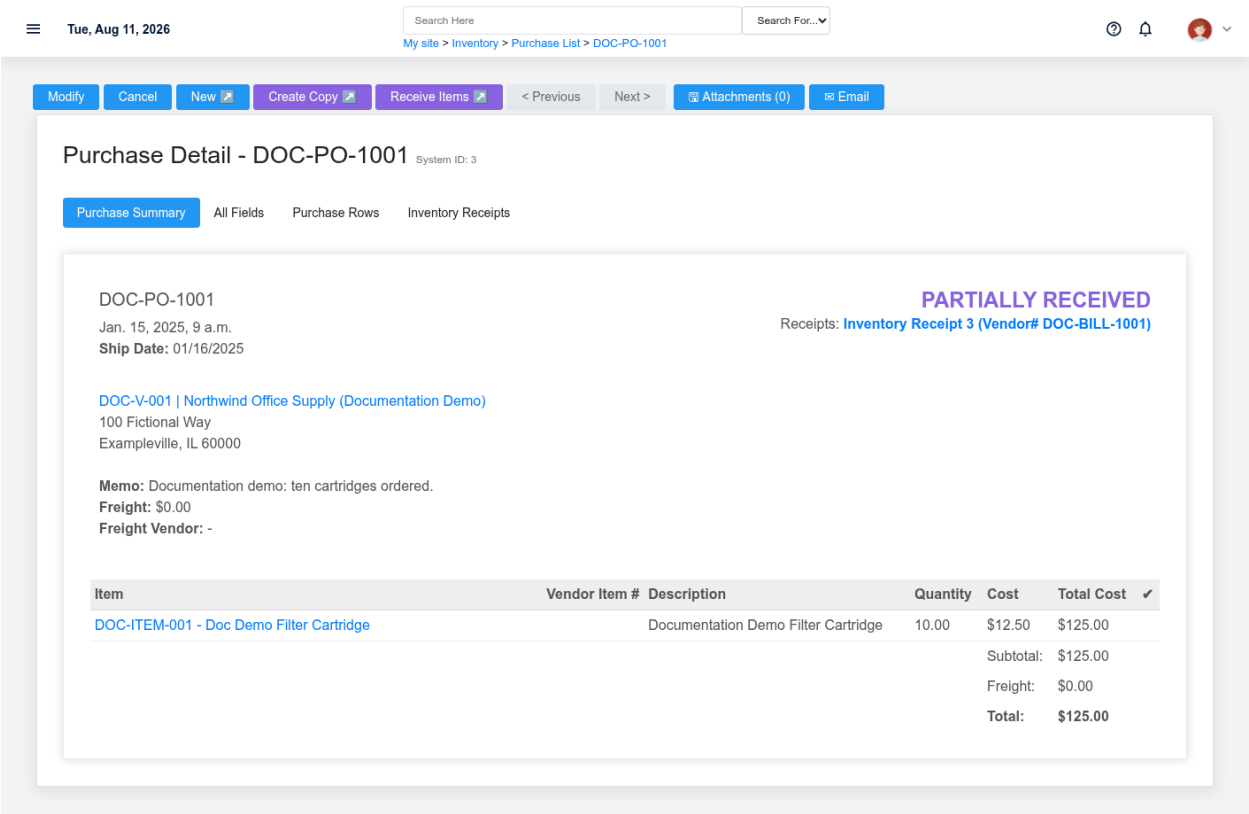
Before you begin



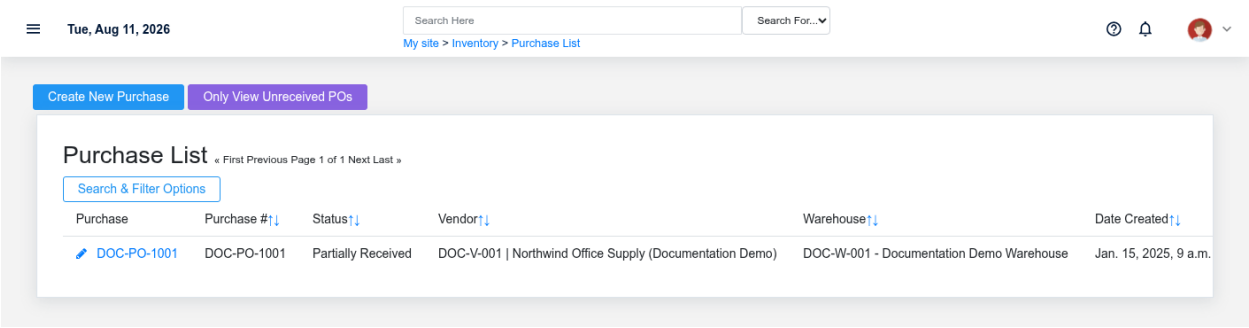
Confirm vendor terms and accounting setup before creating the purchase order.

- Required: valid Vendor, items, units, destination warehouse, payable/fee accounts, terms, and permissions.
- Required when receipt freight is entered: Receiving Freight Accrual Account preference.
- Required for final-cost processing: supported vendor and vendor invoice reference.
- Disable external payment actions in documentation environments.

End-to-end steps



The order retains the vendor, warehouse, ordered quantity, and remaining quantity after partial receipt.



The purchase register shows the order in the purchasing pipeline before receipt.

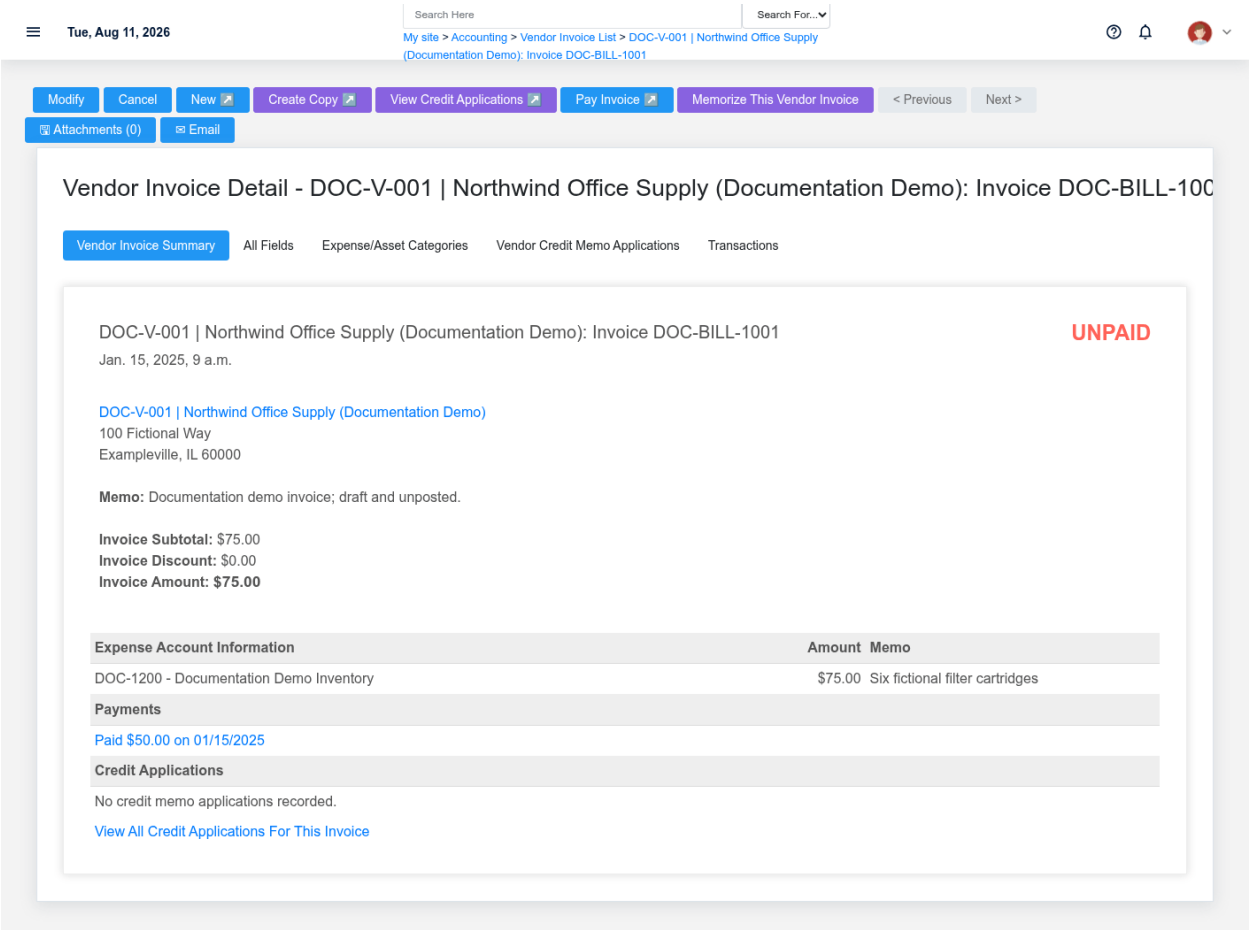
1. **Buyer — verify vendor and need.** Confirm vendor, warehouse, requested dates, item, unit, quantity, cost, freight, and total. If the need came from Restock, first review Automatic Restock to Replenished Inventory.
2. **Buyer — create and submit the Purchase Order.** Create Purchase Order DOC-PO-1001. It begins Draft. Review rows before the supported submission action; submission alone does not prove a vendor received a message.

Receiving checkpoint

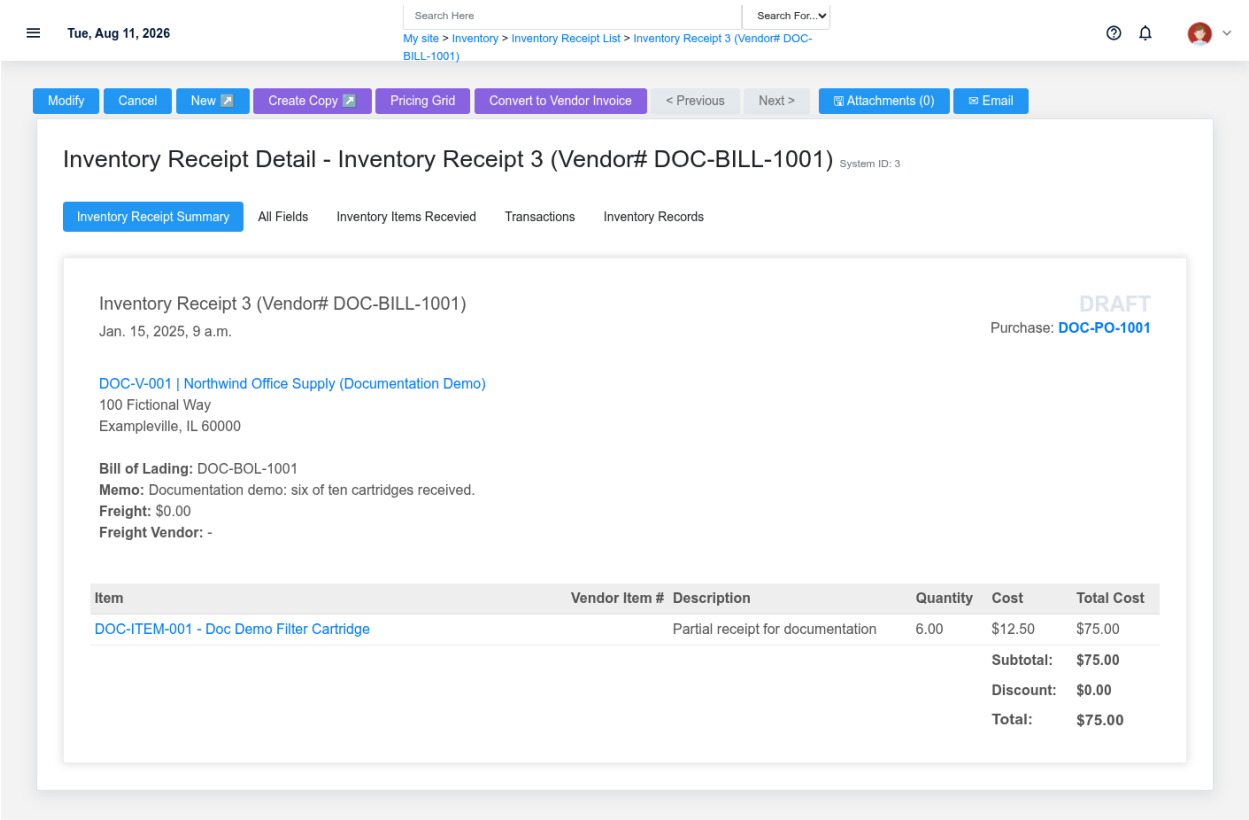
3. **Receiving clerk — record delivered quantity.** Convert the order to an Inventory Receipt. DOC-BILL-1001 records six of ten cartridges. Purchase status becomes Partially Received because the receipt total is below the ordered quantity.

4. **Receiving/accounting — review receipt costing.** Confirm accepted quantity, date, warehouse, BOL, freight, costs, and remaining quantity. Deferred/final-cost processing can require the vendor and vendor invoice number.
5. **Accounts payable — enter the vendor invoice.** Create Vendor Invoice DOC-BILL-1001 from the vendor document. Verify invoice/due dates, terms, subtotal, amount, receipt links, allocation accounts, and posting state.
6. **Authorized payer — record payment.** Use **Pay Invoice** to create Vendor Payment. Check 1001 allocates $50 to the $75 fictional invoice. Confirm account, amount, date, reference, and allocation before posting or issuing anything.
7. **Reviewer — verify the chain.** Review Purchase, Receipt, Vendor Invoice, credits, payment applications, accounting transactions, and the remaining open quantity/obligation.

What Brisk keeps connected



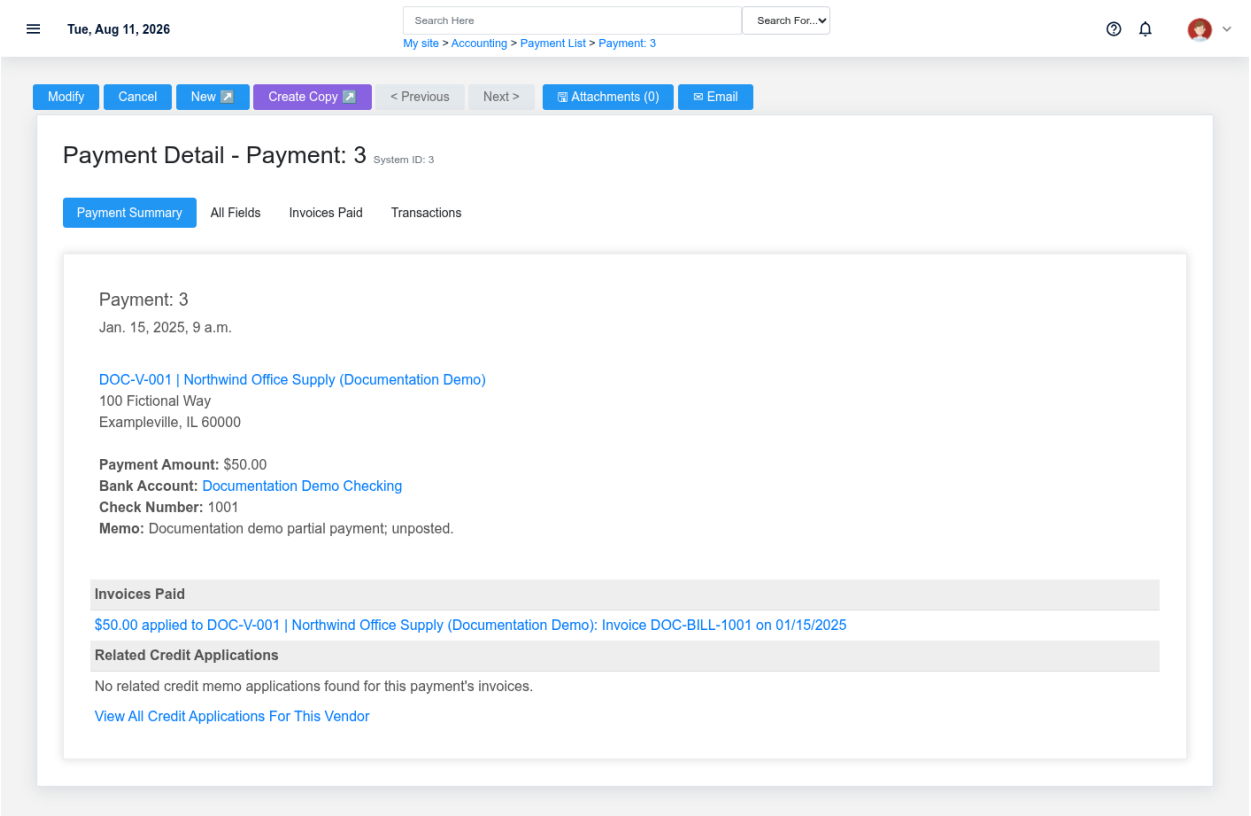
The vendor invoice remains Draft until accounting verifies dates, terms, amount, allocation, and receipt support.



Receiving records only the six units that physically arrived and keeps their link to the order row.

Action	Result or downstream record	Where to verify it
Submit Purchase	Vendor/warehouse order with item rows	Purchase detail
Receive quantity	Receipt rows tied to purchase rows; partial status when incomplete	Receipt and Purchase detail
Record Vendor Invoice	Payable document with allocations and receipt support	Vendor Invoice detail
Allocate Vendor Payment	Payment-to-invoice link and remaining unpaid amount	Payment and Vendor Invoice detail

Handoffs and controls



The partial payment retains its invoice allocation while the remaining obligation stays visible.

The buyer hands an approved order and delivery expectation to receiving. Receiving supplies quantity and freight/cost evidence to accounting. Accounts payable matches vendor invoice, receipt, and purchase before payment. Purchase, Receipt, Vendor Invoice, and Payment each remain authoritative for their own business event.

Exceptions and safe corrections

- Wrong draft vendor/item/quantity: correct the Purchase before submission.
- Short delivery: receive only accepted units and keep the order Partially Received.
- Missing freight account or final-cost inputs: correct configuration/evidence before processing.
- Duplicate vendor invoice: search vendor and invoice number before creating another.
- Wrong posted invoice/payment: use the supported credit, void, reversal, or corrected allocation; do not delete material history or create an unrelated opposite record.

Related documentation

Start here

- Purchase Orders

Continue with

- Inventory Receipts
- Vendor Invoices
- Vendor Payments

Related controls and reports

- Automatic Restock to Replenished Inventory
- Inventory

Navigation

Start here

- Create the purchase order

Before this step

- Begin with automatic restocking

Next steps

- Receive ordered inventory
- Record vendor payment
- Review the vendor invoice

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