

Entering a Purchase invoice (Bills to Pay)

Via the dashboard

Bills you need to pay

New bill	Draft bills	0.00
	12 Awaiting payment	7,429.21
	11 Overdue	7,187.21

Business Tab

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From – This is your contact name

Date – Date on the invoice

Due Date – Date you expect to pay it

Reference – Invoice number or some other way to find the invoice

Total – Total amount owing

Amounts are – Choose tax inclusive/exclusive or no tax (depending on the invoice)

Description – What is the bill for

Quantity – Usually set to 1 unless the invoice is split for multiple items

Unit Price – Price per unit

Account – What account does it relate to (ie motor vehicle expenses, rent, purchases etc)

Tax Rate – Automatically populates based on the account chosen. Check this is correct before continuing.

Tracking Code – Only used if tracking is in place

The total on the invoice must match the total you entered.

It is a good idea to attach a copy of the actual invoice you are paying as an electronic file. Next to the reference section of the bill you will see a small blue icon which looks like a sheet of paper with a corner folded over. When you click on this icon you can then add a copy of the actual invoice (or any other relevant information). For further information on loading files onto Xero please refer to the File Storage training guide.

If you would like to save the invoice and come back to work on it later press **save**. You can also save it and submit it for approval if there is a manager who needs to approve invoices before payment is made.

Then **approve** the invoice for payment. This will then update your accounts payable and you can see what is owing in the future.

From: Date: Due Date: Reference:

Amounts are

Total

Item	Description	Qty	Unit Price	Account	Tax Rate	Region	Amount NZD
⋮	October Parts	5.00	40.00	300 - Purchases	15% GST on Expenses	Eastside	200.00 X
⋮							X
⋮							X
⋮							X
⋮							X

[Assign expenses to a customer](#)

Subtotal 200.00

Includes GST 15.00% 26.09

TOTAL 200.00