questico.site

Purchase Orders & Vendors

User manual

Inside your tool it is called “Kharid”.

A purchasing desk for small manufacturers that takes a shop-floor request through a GST-ready purchase order, owner approval, gate receiving and the vendor's bill.

1. Your tool at a glance

Kharid puts the whole buying chain in one place: staff ask for what they need, managers turn approved requests into GST-correct purchase orders, and orders above a set amount wait for the owner's approval. Stores count each delivery at the gate with rejections, the vendor's bill is matched to what was accepted, and bills are tracked to their pay-by date. The owner also gets vendor scores for on-time delivery, rejections and lead time, and a watch on price changes.

Made for: Small manufacturing units, for example an auto-components machine shop, with an owner, one or more purchase or production managers, and stores or shop-floor staff. The sample business is an auto-components maker in Chakan MIDC, Pune.

Who can do what

Your tool has 3 role profiles. Everyone signs in with their own email address and sees only what their role allows.

Role	Usually	Can	Cannot
Owner	The factory owner or proprietor	• Do everything a manager can • Approve or send back orders above the approval limit, or every order if the owner chooses to approve all • Approve an order straight away when submitting it themselves	• Decide their own purchase request
Manager	A purchase, production or plant manager	• Approve or decline other people's requests • Create, edit, submit, send, cancel and close short purchase orders • Approve orders at or below the approval limit by submitting them (unless the owner approves every order) • Add and edit vendors • Record, edit, delete and mark vendor bills paid • Open Reports • Record deliveries and raise requests like staff	• Approve orders above the limit; these wait 'With the owner' • Decide their own purchase request
Staff	Stores, gate and shop-floor staff	• Raise purchase requests and withdraw their own pending ones • See their own requests and the decisions on them • Record deliveries and print goods receipt notes • Browse vendors and WhatsApp them	• Open Purchase orders, Vendor bills or Reports • Edit vendors • See rates and order values, unless the owner turns on 'show rates and values to staff'

What staff can do in each list

These rules are kept by Questico's database, not only by the screens: a staff member who finds a way past a screen is still refused. They are for staff: owners and managers are not held to them.

Vendors

- Staff see every entry.
- Staff can't add entries.
- Staff can't change entries.
- Staff can't delete entries.

Purchase requests

- Staff see every entry.
- Staff can add entries in their own name.
- Staff can't change entries.

- Staff can't delete entries.
- Staff may change only the cancelled mark (to withdraw a request).

Purchase orders

- Staff see every entry.
- Staff can't add entries.
- Staff can't change entries.
- Staff can't delete entries.
- Staff may change only the status and the date received.
- Inside the order lines, staff may change only the quantity received and the quantity rejected.
- Those limited changes are allowed only while the order is approved, sent or part-received.
- Staff can only record goods received against an order: they can never draft, approve, send, cancel or close one.

Goods received notes

- Staff see every entry.
- Staff can add entries in their own name.
- Staff can't change entries.
- Staff can't delete entries.
- An entry is a staff member's own when they made it.

Numbering

- Staff see every entry.
- Staff can add entries.
- Staff can't change entries.
- Staff can't delete entries.
- Staff may only increase the goods received note number.

2. Getting started

Ready when you buy

- Your business name (and its short form) is set from checkout, and your contact details replace the demo's.
- The demo business is gone: its people, customers, vendors and figures are not in your copy. City and address start empty for you to fill in.
- Lists such as departments start with a common set; change them to match your business in the admin panel.
- Your state and GSTIN from checkout are already on your purchase orders.

Where your tool lives

- Your tool has its own address, such as yourbusiness.questico.site. Open it on a phone or a computer.
- You can also open it from your Questico account: Your space → Paid, or your console, where the tool shows three buttons: Open the tool, Edit website (the admin panel) and Team.

Signing in: there are no passwords

- Everyone opens your tool’s address and presses Sign in, then signs in with the email you added for them, in one of two ways.

- With Google: press “Continue with Google”. For a Gmail address, or a work email that is a Google account (Google Workspace). Google looks after the password and security.
- With any other email (Outlook, Zoho, your company’s own mail): under “No Google account? Use any email”, type the address and press “Email me a code”. Questico emails a 6-digit code; type it in and you are in. The code works once and expires soon.
- Someone who signs in but has not been added sees “You’re signed in, but not invited yet” until you add their address.

Adding your team

1. One person at a time: in your Questico console, open the tool’s Team section, type their email address and choose “Can use it” (Staff) or “Can manage it” (Manager).
2. Everyone at once: in the same Team section → Add many from Excel. Download the template, fill one row per person (name, email and access), and upload it. You see every row checked before anything is added.
3. Your whole company, for all your tools: Your space → Your company team. Upload your staff sheet once (name, email, employee ID, department, designation, function, mobile, joining date, access, and Active or Left), then press Apply beside each business tool. New people get access and appear on the tool’s own lists. Applying never changes the access someone already has in a tool. To take someone off, mark them Left: the next Apply removes their access, and their past records stay. Someone simply missing from a new sheet is not treated as having left.

Partners as owners

- If you run the business with partners, make them owners too: in your console, the tool’s overview has an Owners card. Type a partner’s email and press Add an owner. Up to five owners in all.
- They become owners the next time they sign in to Questico with that email, and can then do everything you can: the admin panel, the team, and asking for changes. The tool shows in their own Your space under Sites you co-own.
- Any owner can remove a co-owner, and a co-owner can leave. The person who bought the tool always stays an owner.

Sending the invitation, and seeing who has joined

- Questico emails each person an invitation as soon as you add them, however you add them: one at a time, from Excel, or from your company team. It tells them your tool’s address and how to sign in, with Google or with a code.
- In the console’s Team section, “Remind the N not signed in” emails everyone who has not joined yet. Under “Send the invitation” you can also copy the ready message for your team’s WhatsApp group.
- The same page counts who has joined and who has not signed in yet, lists everyone with the date they were invited and the date they joined, and downloads the list for Excel.
- To change someone’s access or remove them, use the tool’s Team screen or the console’s Team section. Their past records stay.

The emails Questico sends your team

Questico tells people when something needs them, by email from notices@questico.site, so nobody has to keep the tool open to find out.

Within a few minutes

- Owners and managers: “Purchase request from [name]: [qty] × [item].”
- The person who asked: “Your purchase request was [status].”

- Owners: “A purchase order to [vendorName] is waiting for your approval.”

Every morning at 8

- Owners and managers: “N purchase requests waiting for a decision”
- Owners: “N purchase orders waiting for your approval”

Several things at once come as one email, never a flood. Each email says what happened and links to your tool. Anyone can stop them: the link at the foot of each email stops that business’s notices for that person, and the same link turns them back on. Invitations and sign-in codes still arrive.

Changing your settings

In your console, press Edit website to open your tool’s admin panel. Change the name, logo, colours, words, pictures, lists and rules; every change shows in a live preview first. Records (the day-to-day entries) are made inside the tool itself.

Everyday features

- On a phone the menu moves to a bar at the bottom, and tables turn into cards.
- Anything printable opens your browser’s print window, where you can also choose “Save as PDF”.
- Lists and reports download as CSV files that open in Excel.
- WhatsApp messages open ready-written; you press send. Nothing is sent automatically.

3. Your first day

1. Before buying, try the demo with sample data and switch View as between owner, manager and staff to see each screen
2. Open the admin panel from Edit website in the Questico console; every change shows in a live preview
3. Enter the business name, address, state and GSTIN, upload the logo and pick the colours
4. Set the owner-approval limit and whether the owner approves every order, the over-receive tolerance and the due-soon days, and decide whether staff see rates and values
5. Set the PO and goods receipt series, digits and financial-year option, and write the deliver-to text, PO terms, foot line and signatory
6. Choose the GST rates, the default rate and the units
7. Set the vendor categories with colours, and the payment terms
8. Set the departments, rejection reasons and payment modes
9. Fill in the welcome texts, receiving rules, sign-in texts, pictures and contact
10. Inside Kharid, add your vendors first
11. Add your team in the Questico console's Team section: type each person's email address and choose 'Can use it' (staff) or 'Can manage it' (manager); Kharid has no team screen of its own
12. Ask each person to sign in with that email address (with Google, or a code Questico emails them)

4. Everything it does

Today (owner and manager)

- Show a headline with the value on order, number of vendors, late deliveries and orders waiting for approval
- Start a new purchase order, or jump to waiting requests (or Record delivery)

- Show figures for Still to arrive, Late deliveries, Awaiting approval, and Bills due in the next few days (with overdue)
- List orders waiting for approval; the owner has an Approve button on each row, managers see 'With the owner'
- List late deliveries and orders arriving this week
- Chart purchases by month (6 months), the last 90 days by category, and the top vendors over 90 days
- Show an 'Add your first vendor' start screen when there are no vendors or orders yet

Today (staff)

- Open Record delivery or Ask for a purchase in one tap
- Show figures for Due this week, Your open requests, On order for you, and Deliveries you logged in 30 days
- List orders expected at the gate, each with a Receive button
- Show the receiving rules the owner has written
- List the person's own requests

Requests (everyone asks; owner and manager decide)

- Ask for a purchase: item, quantity, unit, needed-by date, department, usual vendor (optional), expected rate (optional) and why it is needed
- Let staff see only their own requests and withdraw one that is still pending
- Show managers tabs for Waiting, To order, Ordered and All, with a badge counting requests waiting from other people
- Approve a request, or decline it with a reason the person who asked can see
- Stop anyone deciding their own request
- Tick approved requests and make one purchase order from them, with the vendor (if all share one), the earliest needed-by date and the lines filled in
- Flag requests whose needed-by date has passed, and show the reply note and the PO number once ordered

Purchase orders (owner and manager)

- Show the last 6 months by default, with arrows to open older months
- Show a badge for the owner counting orders awaiting approval
- Show figures for Still to arrive, Late, Awaiting approval (plus drafts) and Received
- Filter by Open, Drafts & approval, Received, Cancelled or All, and search by PO number, vendor or item
- Download orders as a spreadsheet (one row per line)
- Open an order to see its status, approver, any 'sent back' note, and a late warning with the vendor's name and phone
- See each line's ordered, received, rejected and still-due quantities, and open each goods receipt
- Edit an order while it is a draft, pending or approved
- Submit a draft for approval
- Approve an order, or send it back with a note (owner)
- Mark an approved order as sent, which opens WhatsApp to the vendor with the PO lines and total
- Record the vendor's bill once the goods are received
- Close a partly received order short
- Cancel an order only if nothing has been received, with a reason; its requests reopen
- Record a delivery or print the order

PO editor (owner and manager)

- Choose the vendor, PO date, deliver-by date, payment terms (filled from the vendor), a different deliver-to address if needed, and a note to the vendor
- Add lines with item, HSN, quantity, unit, rate and GST; items bought before are suggested with their unit, last rate, GST and HSN, and a 'Last bought at ₹X' hint
- Show live totals with CGST+SGST or IGST, and flag when the owner must approve
- Save as draft or Submit (the owner's button reads Approve)
- Require a rate on every line before the order goes for approval
- Send an approved order back to 'Awaiting approval' if a manager's edit takes it above the owner's limit

Receiving (everyone)

- Show figures for Expected, Deliveries in 30 days, Lines with rejections and Rejected pieces
- List orders expected at the gate, late ones first, with what is still due
- Record a delivery: date received, vendor challan or invoice number, vehicle number and note
- Enter for each line the quantity received now, rejected, and the reason from the list
- Refuse a future date, more rejected than received, or more accepted than due plus the allowed over-receive %
- Open the goods receipt note for printing after saving
- List recent deliveries and download them as a spreadsheet

Vendors (everyone views; owner and manager edit)

- Search vendors and filter by category
- Show each vendor's category, terms, star rating, on-time % and value ordered in 6 months (value only for those allowed to see values)
- Open a vendor to see contact details, GSTIN, terms, notes, orders, on-time %, rejected %, lead time and recent POs
- WhatsApp the vendor from their page
- Add or edit a vendor: name, category, payment terms, contact person, phone, email, town, state, GSTIN (checked), your 1–5 star rating, notes and Active
- Start a new PO from the vendor's page

Vendor bills (owner and manager)

- Show figures for To pay, Overdue, Due in the next few days and Paid this month
- Warn about received orders that have no bill yet
- Filter by To pay, Paid or All
- Chart when the money goes out: overdue, due soon, within 30 days and later
- Record a bill against a received order: vendor's bill number, bill date, amount (filled with the value of goods accepted), pay-by date (bill date plus the term days) and note
- Warn if the bill amount differs from the value of goods accepted by more than ₹1
- Mark a bill paid with the date, payment mode and UTR or cheque number, which closes the order
- Edit or delete a bill, and download bills as a spreadsheet

Reports (owner and manager)

- Choose a range of 1, 3 or 6 months
- Show value ordered, vendors used, on-time delivery and how many prices went up
- Chart orders by month and by category

- Show a vendor scorecard: orders, value, share, on time, rejected and lead time, with a spreadsheet download
- Show a price watch: the same item at its last two rates, with the % change
- Show the latest order as it prints

5. Reports, prints and downloads

Prints

- Purchase order, printed or saved as PDF: letterhead with logo or short name, name, address, phone, email, GSTIN and state
- A status stamp on the PO: DRAFT, AWAITING APPROVAL or CANCELLED
- Vendor (with GSTIN), deliver-to address and payment terms; lines with HSN, tax rows, total and amount in words; note and numbered terms
- Prepared by, Approved by and 'For [business]' signature lines, and a foot note
- Goods receipt note: ordered, received, rejected and accepted quantity, unit and reason for each line, with signature lines for stores, quality and the business

Downloads

- Purchase orders, one row per line (16 columns)
- Deliveries
- Vendor bills
- Vendor performance scorecard

WhatsApp

- Mark sent opens WhatsApp to the vendor's number with the PO lines and total ready; the user presses send
- The vendor page opens WhatsApp with a 'Namaste …' opener

Worked out for you

- Taxable value per line and GST by rate
- IGST when the vendor's state differs from the business state, otherwise CGST and SGST split half and half
- Round-off to the rupee and the amount in words
- Accepted = received − rejected; still due = ordered − accepted
- Open value is worked out on the quantity still due
- The bill check uses the value of goods accepted
- Pay-by date = bill date + the payment term's days
- On time = fully received by the deliver-by date; rejection % of pieces; lead time = order date to full receipt
- Price watch compares an item's last two rates
- PO numbers run like SGA/PO/26-27/0042, or SGA/PO-0042 with the financial year turned off; goods receipts have their own series
- Money in Indian grouping (₹12,34,567) and dates by the Indian financial year

6. What you can change in the admin panel

No coding: every change shows in a live preview, and saving updates your live tool.

Business & look

- Change the name, short name, city and factory address
- Set the state (required; it decides IGST or CGST+SGST) and GSTIN (optional, checked)
- Upload the logo
- Choose the main colour, sidebar style (Light, Deep or Tinted), one of 8 typefaces, and corners (Soft, Round or Sharp)

Approvals & rules

- Set the owner-approval limit in ₹ (including GST)
- Choose whether the owner approves every PO
- Set the over-receive tolerance (0 to 50%)
- Set how many days ahead to warn about deliveries and bills due
- Show or hide rates and values to staff

PO numbering & wording

- Set the PO series and the goods receipt series
- Set the number of digits (1 to 8) and whether to include the financial year
- Write the deliver-to text, PO terms (one per line), foot line and signatory line

GST & units

- Choose the GST rates offered (default 0, 5, 18 and 40)
- Set the default rate on a new line
- Edit the list of units

Vendors & payment terms

- Set 1 to 20 vendor categories, each with a name and colour
- Set 1 to 12 payment terms, each with a label and days to pay

Requests & receiving

- Edit the departments, rejection reasons and ways you pay vendors

Words & pictures

- Write the manager welcome, staff welcome and the receiving rules shown to staff
- Write the sign-in heading, text and quote
- Change the three pictures; they are shrunk automatically on upload

Contact

- Enter the contact email and phone or WhatsApp

Checks the panel makes

- PO and goods receipt prefixes must differ
- GST rates must be numbers from 0 to 100, and the default rate must be in the list
- Payment term names must be unique

7. Good to know

- There is no team or invite screen inside Kharid; people are added from the Questico console
- It does not keep stock or inventory levels
- Purchase orders are not emailed; vendors are reached through WhatsApp links or a printed PO
- WhatsApp opens with the message ready; nothing is sent automatically
- 'Show rates and values to staff' only hides them on the screen; it is not a lock on the underlying records
- The rule that only the owner approves orders above the limit is applied by the tool's screens
- One bill per purchase order, and a bill is either paid or not: no part payments, TDS or debit notes
- Orders, deliveries and bills are read for the last 6 months, and requests for the last 4 months
- Challan or invoice images cannot be attached
- A person who signs in without being invited sees 'You're signed in, but not invited yet'

Need help?

Write to contact@questico.site with your tool’s address and what you need.