SOP 2: Quantity Change Exception

SOP ID: SOP_QUANTITY_CHANGE_V1

Exception Type: Quantity Change (PO vs GRN vs Invoice)

Step 1: Confirm Exception Context

- Confirm that ordered, received, and invoiced quantities are mismatched.

- Ensure this is not caused by partial delivery timing.

Step 2: Quantify Deviation

- Calculate difference between ordered / received / invoiced quantities.

- Classify by variance %:

≤ 5 % → Low

5–15 % → Medium

15 % → High

Step 3: Assign Severity

- Tag severity level and note which document pair caused the mismatch (e.g., Invoice > GRN).

Step 4: Generate Reasoning Summary

Explain:

- What quantity difference was found.

- Between which documents (PO, GRN, Invoice).

- What could have caused it (partial shipment, early billing, etc.).

- Why finance needs to know (risk of over/under-billing).

Example tone:

"Invoice shows 100 units billed, but only 80 units were received under GRN 500234.

This 20 % variance may indicate early billing or incomplete delivery."

Step 5: Recommend Action

- Low: Note only.

- Medium: Recommend reconfirmation with warehouse.

- High: Recommend hold until delivery confirmation.

Step 6: Populate Dashboard Output

{

"exception_type": "Quantity Change",

"variance_percent": 20,

"severity": "High",

"recommended_action": "Hold until receipt confirmation.",

"agent_reasoning_summary": "Invoice quantity exceeds received quantity by 20%. Early billing or short delivery likely.",

"status": "Pending",

"confidence_score": 0.9

}