

Summary of the Flowchart:

The flow chart depicts a procurement process that includes multiple roles and steps between employee purchase requests, purchase/procurement team and vendors.

Request Creation:

- The process begins with an employee creating a purchase request (PR) and sending it for approval to their manager.

Approval Process:

- **Manager Level 1** evaluates the purchase request and approves or rejects it based on cost. If the cost exceeds the company's set budget, **Manager Level 2** reviews and decides. If either of the managers approves the purchase request, below are the next steps.

Vendor Interaction:

- The Purchase Team sends RFQs (Request for Quotations) to vendors.
- Vendors submit quotations, which are analyzed, and one is selected.

Purchase Order (PO) Generation and Review:

- The Purchase Team generates a PO, which is approved by the Purchase Manager and sent to the vendor.

Product Delivery and Inspection:

- Products are sent to the warehouse.
- The warehouse inspects the products for completeness and correctness. Damaged products are returned for replacement.

Three-Way Matching and Payment:

- Accounts Team performs a three-way matching (PO, Goods Receipt Note, and Invoice).
- If matching is successful, payment is processed. Otherwise, it is placed on hold until issues are resolved.

Epic, User Stories and Acceptance Criteria:

Epic 1: Employee registration and login

User story 1.1: Login to the system

As an employee, I want to log into the procurement portal using my email or social media accounts to access the purchase request page.

Acceptance Criteria

Positive Scenario:

- Given I am on the login page,
- When I enter valid credentials and click on the login button,
- Then I should be logged into the procurement portal and be able to access the purchase request page.

Negative Scenario:

- Given I am on the login page,
- When I enter an invalid email address or password and click on the login button,
- Then I should receive an error message indicating that the credentials are invalid.

Alternate Scenario:

- Given I am on the login page,
- When I attempt to log in using social media accounts and successfully authenticate with the social media platform,
- Then I should be logged into the procurement portal automatically.

User story 1.2: Select the type of Requisition

As an employee, I want to select the type and quantity of requisitions for items such as keyboards, monitors, mice, and others so that I can accurately submit my request.

Acceptance Criteria

Positive Scenario:

- Given I am on the requisition page,
- When I click on the type of requisition,
- Then I should see a list of items to choose from.
- When I select the type and quantity of requisition,
- Then I should be able to submit my request successfully.

Negative Scenario:

- Given I am on the requisition page,
- When I do not select any requisition item or quantity and attempt to submit,
- Then I should receive a popup message stating, "Please select the requisition item/quantity."

Alternate Scenario:

- Given I am on the requisition page,
- When I select "Other" as the type of requisition and fill in the description section,
- Then I should be able to submit my request successfully.

Epic 2: Review and Approve Purchase Requests:**User Story 2.1: Approval by Manager Level 1**

As Manager Level 1, I want to review and approve/reject purchase requisitions that are within my cost approval limit so that valid requests can be directly sent to the Purchase Team without additional approvals.

Acceptance Criteria**Positive Scenario:**

- Given a purchase requisition is submitted by an employee,
- When I log into the system and access the requisition list,
- Then I should be able to view the details of the request, including type, quantity, and cost.

- When I approve a requisition that is valid and within my cost approval limit,
- Then the system should directly forward the approved requisition to the Purchase Team.

Negative Scenario:

- Given a purchase requisition is submitted by an employee,
- When I find that the details are incomplete or the request is invalid,
- Then I should reject the requisition and provide a reason for the rejection.

Alternate Scenario:

- Given a purchase requisition exceeds my cost approval limit but is valid,
- When I forward the requisition to Manager Level 2 for further review,
- Then the system should notify Manager Level 2 for approval.

User Story 2.2: Approval by Manager Level 2

As Manager Level 2, I want to review high-cost purchase requisitions forwarded by Manager Level 1 so that valid high-value requests can be approved and sent to the Purchase Team.

Acceptance Criteria

Positive Scenario:

- Given a purchase requisition exceeds Manager Level 1's approval limit,
- When I log into the system and access the requisition pending my review,
- Then I should be able to view all details, including any remarks from Manager Level 1.

- When I approve the requisition,
- Then the system should notify the Purchase Team to initiate the procurement process.

Negative Scenario:

- Given a purchase requisition is forwarded to me by Manager Level 1,
- When I find any discrepancies or invalid information in the requisition,
- Then I should reject the requisition and return it with remarks for clarification or correction.

Alternate Scenario:

- Given a purchase requisition is received for my review,
- When I need additional clarification or supporting documents from the employee or Manager Level 1,
- Then I should place the requisition on hold and request the necessary information through the system.

Epic 3: Purchase Team Operations**User Story 3.1: Receive approved requisitions**

As a purchase team member, I want to receive approved requisitions from Manager 1 or Manager 2 so that I can initiate vendor selection and procurement.

Acceptance Criteria:

- Given the approved requisition is within the system,
- When I open the requisition details,
- Then I should see all the necessary information, such as item type, quantity, budget, and urgency level, to proceed further.

User Story 3.2: Issue Request for Quotation (RFQ)

As a purchase team member, I want to send RFQs to vendors so that I can receive competitive quotations and choose the best offer.

Acceptance Criteria:**Positive Scenario:**

- Given a requisition is ready for vendor engagement,
- When I generate and send RFQs through the system,
- Then vendors should receive the RFQs with complete details of the requested items.

Negative Scenario:

- Given the RFQ lacks the required details,
- When I try to send it to vendors,
- Then the system should prompt me to complete all fields before submission.

User Story 3.3: Evaluate Vendor Quotations

As a purchase team member, I want to evaluate vendor quotations based on cost, quality, and delivery timelines so that I can select the most suitable vendor.

Acceptance Criteria:**Positive Scenario:**

- Given vendors have submitted their quotations,
- When I compare quotations using the system's evaluation tools,
- Then I should be able to select the best vendor based on predefined criteria

Negative Scenario:

- Given some vendors have not submitted quotations,
- When I try to proceed without their responses,
- Then the system should notify me of the incomplete vendor participation and prompt me to send a follow-up.

Alternate Scenario:

- Given no vendor quotations meet the requirements,
- When I decide to negotiate with vendors,
- Then the system should allow me to send negotiation requests and track responses.

User Story 3.4: Issue Purchase Order (PO)

As a purchase team member, I want to issue a purchase order to the selected vendor so that they can start processing the request.

Acceptance Criteria:

Positive Scenario:

- Given the vendor has been selected,
- When I generate a PO and send it through the system,
- Then the vendor should receive the PO with all necessary details (e.g., items, quantity, price, delivery timeline).

Negative Scenario:

- Given there are errors in the PO,
- When I attempt to send it to the vendor,
- Then the system should highlight the errors and prevent submission until they are corrected.

Alternate Scenario:

- Given the vendor requests modifications to the PO,
- When I edit the PO details,
- Then the system should allow me to update and resend the PO to the vendor.

User Story 3.5: Track Vendor Delivery

As a purchase team member, I want to track vendor delivery progress so that I can ensure timely receipt of products.

Acceptance Criteria:

Positive Scenario:

- Given the vendor has accepted the PO,
- When I check the delivery status in the system,
- Then I should see real-time updates on the delivery progress.

Negative Scenario:

- Given the delivery is delayed,
- When I do not receive any notification from the vendor,
- Then the system should allow me to send a follow-up or escalate the delay.

Alternate Scenario:

- Given the vendor notifies of a delay,
- When I approve an updated timeline,
- Then the system should update the delivery schedule and notify the relevant stakeholders.

User Story 3.6: Close the Procurement Process

As a purchase team member, I want to close the procurement process after successful delivery and acceptance of products so that the records are updated.

Acceptance Criteria:**Positive Scenario:**

- Given the products have been delivered and accepted,
- When I mark the procurement process as complete in the system,
- Then the system should log the transaction and notify the finance team for payment processing.

Negative Scenario:

- Given there are unresolved issues with the delivery,
- When I attempt to close the procurement process,
- Then the system should prevent closure and display a list of pending issues.

Alternate Scenario:

- Given the process is ready for closure,
- When I generate a summary report,
- Then the system should compile all details and make the report available for stakeholders.

User Story 3.6: Manage Rejected or Damaged Products

As a purchase team member, I want to coordinate with vendors to replace rejected or damaged products so that the requisition can be fulfilled.

Acceptance Criteria:

Positive Scenario:

- Given the warehouse team rejects a delivery,
- When I notify the vendor about the issue,
- Then the vendor should acknowledge and arrange for replacements.

Negative Scenario:

- Given the vendor fails to respond to rejection notifications,
- When I escalate the issue,
- Then the system should track and log the escalation for further action.

Alternate Scenario:

- Given rejected or damaged products,
- When I negotiate with the vendor for partial acceptance or a discount,
- Then the system should update the PO and notify all stakeholders.

Epic 4: Finance Team Processes

User Story 4.1: Validate Vendor Invoices

As a finance team member, I want to validate vendor invoices against the purchase orders and delivery receipts so that accurate payments are made.

Acceptance Criteria:

Positive Scenario:

- Given I have access to the finance dashboard and the submitted invoice,
- When I compare the invoice details with the purchase order and delivery receipt,
- Then I should be able to mark the invoice as "Validated."

Negative Scenario:

- Given the invoice details do not match the purchase order or delivery receipt,
- When I attempt to validate the invoice,
- Then the system should display an error message: "Invoice details do not match the purchase records."

Alternate Scenario:

- Given I find discrepancies in the invoice,
- When I escalate the invoice for further verification,
- Then the system should mark the invoice as "Pending Verification" and notify the purchase team.

User Story 4.2: Process Vendor Payments

As a finance team member, I want to process vendor payments after invoice validation so that vendors are paid on time.

Acceptance Criteria:**Positive Scenario:**

- Given the invoice is marked as "Validated,"
- When I initiate the payment process,
- Then the payment should be processed, and the system should update the status to "Paid."

Negative Scenario:

- Given the payment cannot be processed due to insufficient funds,
- When I attempt to initiate the payment,
- Then the system should display an error message: "Payment failed due to insufficient funds."

Alternate Scenario:

- Given the payment terms require partial or milestone-based payments,
- When I process the payment,
- Then the system should update the payment status as "Partially Paid" and reflect the remaining balance.