

Issue PO (From Event)

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Procurement event awards are approved. User selects "draft PO for vendor X" (for all items, or for specific items)

Top part of screen

Basic PO Fields

Procurement Event ID
Creation Date (autofilled when sending final PO)
Buyer Name
Buyer PO ID
Buyer Billing Address (choose from list)
Buyer Contact (default to self, can choose other user ID)
- Name, Phone, Email
Buyer Tags (PAN, GST, license number, etc)
Seller Name
Seller Address
Seller Tags
Seller Contact (optional; can be empty, or from list, or manual)
Buyer Shipping Address (carried over from event)

Grey = Non-editable
Orange = Choose from list
White = Manual Entry

If the vendor was awarded items with N different shipping addresses, the user is notified that N different POs will be created. The fields from the top of the screen will be copied over to all these POs. In this case, the header should become "PO 1 of N" and the user should be directed to "PO 2 of N" when he has finalized the item list and final details of PO1.

For each next PO, the basic PO fields should be autopopulated based on the first PO (except shipping address)

Middle portion of screen

Item list autogenerated: each item has these fields:

Buyer Item Code
Buyer Item Name
Buyer Item Description / Specifications
Due Date
Currency Code
Measurement Unit
Rate
Quantity
Optional: Allow vendor to invoice in different unit? If selected:
Alternate Measurement Unit
Alternate Rate (autopopulated from a predefined conversion table)
Alternate Quantity (autopopulated from a predefined conversion table)
Tax1
Tax2
Tax3
Tax4
Amount (incl taxes)

Bottom of screen

Final few PO details:

Discount details - fill one of the following, we calculate the other (autofilled, but editable in case a different discount was agreed offline)
Overall Discount %
Discount Amount
Final PO Amount (can be a combination of currencies - e.g. 10000 INR + 2000 USD)
Delivery Batch Type (choose single delivery or multiple deliveries)
Delivery Schedule Type (Choose fixed or To Be Determined)
Payment Terms
Buyer Comments
Delivery Terms (free, managed by seller, managed by buyer) - default from procurement event

Free Delivery:
Nothing more to do

Managed by Seller:
User has to input an amount for "Maximum Freight Charges" (autofilled from event)

Managed by Buyer:
User gets an option to "Add freight PO to this PO"

User can save his draft as a draft
OR
Add approval and submit for further approval (ref PO generation workflow)
OR
Add approval and submit to seller (if no further approval is required)

Ideally, the goods PO and freight PO should be submitted together for approvals.

If the user does not add a freight PO, he must add "expected freight charges" so that approvers can view the full PO amount before approving.

Show a warning if user attempts to submit such a PO without adding a freight PO.

One or more freight POs can be added to a goods PO at any point (but will require separate approval)