Local Purchase Request & Interbranch Stock Transfer - User Stories & Checklist

# Local Purchase Request - User Stories & Checklist

## 1. Branch Purchase Consideration

• Trigger System: Implement logic to compare branch stock against minimum stock levels and display 'To Order' and 'Stock Out' items.

• Suggested Quantity: Auto-calculate and display the maximum quantity the branch can order.

• Update Required Quantity: Allow manual updates to the required quantity on the purchase consideration screen.

## 2. Purchase Requests

• Item Details Visibility: Display pre-agreed items for local purchase to branch users.

• Item Selection: Enable item selection from a dropdown and input for required quantity.

• Supplier Selection: Add an optional dropdown for selecting suppliers during PR creation.

## 3. Approval Process

• Cluster Manager Approval: Implement logic for Cluster Manager approval, including editing the requested quantity.

• Category Manager Approval: Add logic for Category Manager approval if the requested value exceeds the Cluster Manager's limit.

• Procurement Team Review: Create a screen for the procurement team to review and cross-verify the requests, including altering quantities and notifying branches of changes.

• PO Approval Process: Integrate the standard PO approval process with threshold limits and approval users.

## 4. Post-Order Processing

• Branch Visibility of Ordered Items: Allow branches to view ordered, rejected, partially approved, and pending items.

• Inbound Stock Processing: Enable branches to acknowledge received stock, upload invoices, and validate quantities against the order.

• Goods Return Process: Implement a goods return process that allows branches to initiate returns and communicate with suppliers.

## 5. Reporting

• Branch-Level Reports: Create reports for pending POs with aging for respective branches.

• Warehouse-Level Reports: Develop reports for local purchase POs (pending & fulfilled) across all branches and by individual branch.

# Interbranch Stock Transfer - User Stories & Checklist

## 1. Inter-branch Transfer Request Creation

• Screen Development: Develop a screen for branches to create and manage stock transfer requests.

• Real-Time Stock Search: Implement a search feature to check the availability of items at other branches.

• Auto-Populate Item Details: Ensure the system auto-populates details like quantity, expiry date, batch number, item code, and MRP when an item is selected.

• Multiple Items Request: Enable adding multiple items to a single transfer request.

## 2. Request Acceptance

• Initial Acceptance by Requestee Branch: Implement functionality for the requestee branch to review and accept or reject the transfer request.

## 3. Approval Workflow

• Cluster Manager Approval: Develop logic for Cluster Manager approval for requests up to Rs.2000.

• Category Manager Approval: Implement approval logic for Category Managers for requests between Rs.2000 and Rs.5000.

• Business Excellence Head Approval: Add approval logic for the Business Excellence Head for requests exceeding Rs.5000.

## 4. Stock Transfer Execution

• Outward Stock Processing: Enable the requestee branch to outward the stock once approved.

• Warehouse Notification: Notify the warehouse about the stock transfer to update inventory.

## 5. Inward Stock Processing

• Stock Verification and Inwarding: Implement functionality for the requesting branch to verify and inward the received stock.

• ERP Update: Ensure the ERP system marks the stock as transferred from the respective branch.

## 6. Monitoring and Reporting

• Unsold Stock Reporting: Develop a report for items that remain unsold for more than 7 days, notifying the relevant authorities.

• Inventory Update: Ensure the ERP reflects the stock transfer accurately in the inventory system.