Diligince.ai – End-to-End Workflow for Requirements, RFQ, Bids, PO and Payments

# 1. Overview

This document provides a complete step-by-step flow for implementing the Requirement, RFQ, Bid, Purchase Order (PO) and Payment process in Diligince.ai.  
It includes how each stakeholder (Industry user, Professional, Service/Product/Logistics Vendor) interacts with the platform and how emergency workflows are handled.

# 2. Standard Workflow (Non-Emergency)

Step 1: Requirement Creation by Industry User

* • Title, Description, Location, Skills Required, Category (Service/Product/Expert/Logistics), Timeline, Budget  
  • Can be posted by Maintenance Engineer, Manager, etc.  
  • Optional fields: emergency tag, contact person

Step 2: RFQ Auto Generation

* • AI fetches matching Professionals/Vendors based on skill, location, availability, pricing, ratings  
  • Sends RFQ with deadline to submit Bid

Step 3: Bid Submission by Vendors/Professionals

* • Stakeholder submits Bid with:  
   - Quoted amount, time to deliver, scope, terms  
   - Upload option for supporting documents or catalog  
   - Optional: emergency availability flag

Step 4: PO Issuance by Industry

* • Procurement Manager/Approver evaluates bids  
  • Generates PO to selected party  
  • PO contains timeline, cost, terms, taxes

Step 5: Work Execution and Payment

* • Work begins as per PO  
  • Progress tracked via dashboard (percentage-based)  
  • On completion, invoices uploaded by Vendor/Professional  
  • Finance Head approves and payment is made

# 3. Emergency Workflow

• During RFQ creation, the Industry user tags it as 'Emergency'.  
• AI gives priority to:  
 - Calendar availability (real-time)  
 - Proximity-based vendors/experts  
 - Previously verified/fast responders  
• Notification is sent instantly to shortlisted stakeholders  
• Response time & SLA shown on dashboard  
• Emergency jobs may bypass multi-step PO approval if allowed by company role policy

# 4. Stakeholder Role Flows

## A. Industry Users (Managers, Engineers, Procurement)

• Post Requirement → RFQ Auto Generated → Bids Received → PO Issued → Monitor Progress → Approve Invoice → Payment

## B. Professionals (Experts, Consultants)

• Receive RFQ → Submit Bid → Accept PO → Execute Task → Raise Invoice → Receive Payment

## C. Service/Product Vendors

• Receive RFQ → Attach Quote (Items/Services) → Accept PO → Dispatch Goods / Deliver Service → Upload Invoice → Get Paid

## D. Logistics Vendors

• RFQ may include:  
 - Pickup and delivery points  
 - Required vehicle type, tonnage, schedule  
• They submit Bid and follow regular PO process.  
• Emergency transport has higher priority with SLA tracking

# 5. Enhancements to Implement

• Role-Based Access: Only authorized personnel approve POs and Payments.  
• Notification System: Alerts for RFQ, Bids, POs, etc.  
• Smart AI Matching: Based on skill, rating, location, pricing and calendar  
• SLA Clock: Emergency jobs tracked with countdowns  
• Logs: Track every action (who posted, who approved, when)  
• Real-Time Dashboards for each stakeholder  
• Calendar Integration: Pull availability from Professional profiles

This structured flow ensures clarity, speed, transparency and emergency readiness. Interns should implement it as reusable components for Industry and Vendor dashboards.