**PROJECT TITLE: Procurement Process Automation**

**User Stories & Acceptance Criteria:**

***User Story 1-***

***Creating and Submitting a Purchase Request***

-As a requester, I want to be able to create and approval for a purchase request so that the procurement process can be initiated smoothly.

***Acceptance Criteria***

**Create Purchase Request**

Given- I am logged into the procurement system as a requester,  
When- I navigate to the "Create Purchase Request" page,  
Then- I should see a form with fields for item description, quantity, price, supplier, and delivery date.

Given- I have filled in the required fields for the purchase request,  
When- I click the "Submit" button,  
Then- The system should validate the form and save the purchase request.

Given- the purchase request has been successfully created,  
When- I submit it,  
Then- The system should show a confirmation message and mark the request as "Pending Approval."

**Approval of Purchase Request**

Given- A purchase request has been submitted and is pending approval,  
When- An approver views the request,  
Then- They should see all the details of the request and options to "Approve" or "Reject."

Given- The approver has reviewed the purchase request,  
When- They click the "Approve" button,  
Then- The system should update the status of the request to "Approved" and notify the requester.

Given- The approver has rejected the purchase request,  
When- They click the "Reject" button and provide a reason,  
Then- The system should update the status to "Rejected" and notify the requester with the rejection reason.

***User Story 2-***

***Approval of Purchase Request (Manager Level 1 and 2)***

-As a manager, I want to review and approve or reject purchase requests based on their cost, so that only justified requests proceed.

***Acceptance Criteria***

**Review Purchase Request**

Given- I am logged into the system as a manager,  
When- I navigate to the "Pending Purchase Requests" section,  
Then- I should see a list of all pending purchase requests assigned to me for review, including details like item description, quantity, cost, and supplier.

Given- I have selected a specific purchase request to review,  
When -I click on the request,  
Then- I should see all its details, including justification and total cost.

**Approve Purchase Request**

Given- I have reviewed the details of the purchase request,  
When- I determine that the request is justified based on its cost and click the "Approve" button,  
Then- The system should update the request status to "Approved" and notify the requester that the purchase has been approved.

Given- The purchase request has been approved,  
When- The status is updated,  
Then- The system should allow the procurement process to proceed.

**Reject Purchase Request**

Given- I have reviewed the details of the purchase request,  
When- I determine that the request is not justified based on its cost and click the "Reject" button,  
Then- The system should require me to provide a rejection reason.

Given- I have provided a reason for rejection,  
When- I submit the rejection,  
Then- The system should update the request status to "Rejected" and notify the requester with the rejection reason.

***User Story 3-***

***Creation and Sending of Request for Quotation (RFQ)***

-As a purchasing team member, I want to automatically send RFQs to vendors after a purchase request is approved, so that I can gather quotes from suppliers.

***Acceptance Criteria***

**Trigger RFQ After Purchase Request Approval**

Given- A purchase request has been approved by the manager,  
When- The status of the request changes to "Approved",  
Then- The system should automatically generate a Request for Quotation (RFQ) for the requested items.

**Select Vendors for RFQ**

Given- An RFQ has been generated after a purchase request is approved,  
When- the system sends the RFQ,  
Then- It should automatically select relevant vendors from the approved vendor list based on the item category, previous supplier history, or other pre-defined criteria.

**Send RFQs to Vendors**

Given- Relevant vendors have been selected for the RFQ,  
When- The RFQs are ready,  
Then- The system should automatically send the RFQs to the selected vendors via email or the preferred communication method.

Given- The RFQs have been sent,  
When- The vendors receive the RFQs,  
Then- The system should confirm the RFQ submission and provide tracking of the sent RFQs.

**Notification to Purchasing Team**

Given- An RFQ has been sent to vendors,  
When- The RFQs are dispatched,  
Then- The system should notify the purchasing team member that the RFQs have been successfully sent and are awaiting vendor responses.

**Vendor Response Tracking**

Given- The RFQs have been sent to vendors,  
When- The vendors submit their responses or quotes,  
Then- The system should automatically log the responses and notify the purchasing team of the submitted quotes.

***User Story 4-***

***Quotation Submission by Vendors***

As a vendor, I want to submit my quotations for an RFQ so that I can compete for business opportunities.

***Acceptance Criteria***

**Receive RFQ Notification**

Given- I am a registered vendor in the system,  
When- An RFQ is sent to me,  
Then- I should receive a notification via email or the system portal with the RFQ details and instructions on how to submit a quote.

**Access RFQ Details**

Given- I have received an RFQ notification,  
When- I log into the vendor portal or click the RFQ link in the email,  
Then- I should be able to view the full RFQ details, including item description, quantity, delivery date, and any additional terms or requirements.

**Submit Quotation**

Given- I have reviewed the RFQ details,  
When- I am ready to submit my quotation,  
Then- I should be able to input my pricing, delivery terms, and any additional relevant information into the system.

**Validate Quotation Submission**

Given- I have entered my quotation details,  
When- I click the "Submit" button,  
Then- The system should validate the completeness of my submission (e.g., all required fields are filled) and notify me of any missing information.

**Quotation Confirmation**

Given- my quotation has passed validation,  
When- I successfully submit it,  
Then- the system should provide me with a confirmation message that my quotation has been received, along with a unique reference number for tracking.

***User Story 5-***

***Vendor Selection and PO Creation***

-As a purchase manager, I want to analyze vendor quotations and select the best supplier, so that I can ensure cost-effectiveness and timely delivery.

***Acceptance Criteria***

**View Submitted Quotations**

Given- Vendors have submitted their quotations for an RFQ,  
When- I log into the system as a procurement manager and navigate to the relevant RFQ,  
Then- I should see a list of all the submitted quotations, including vendor name, price, delivery time, and any additional terms.

**Compare Quotations**

Given- I have multiple quotations from different vendors,  
When- I select an RFQ for comparison,  
Then- The system should allow me to compare key aspects of each quotation side by side, including price, delivery time, payment terms, and any additional costs.

**Filter or Sort Quotations**

Given- I have a list of submitted quotations,  
When- I want to prioritize certain criteria,  
Then- The system should allow me to filter or sort quotations based on criteria like price, delivery time, vendor rating, or other relevant metrics.

**Select Best Supplier**

Given- I have reviewed all the quotations and performed comparisons,  
When- I am ready to choose the best supplier,  
Then- I should be able to select the preferred vendor by clicking an "Approve" button next to their quotation.

**Submit Supplier Selection for Approval**

Given- I have selected a vendor,  
When- The procurement process requires further approval for supplier selection,  
Then- The system should submit my decision to the next level approver for final authorization, along with details of the selected quote and reasons for selection.

**Notify Selected Vendor**

Given- The vendor has been approved as the supplier,  
When- The selection is confirmed,  
Then- The system should automatically notify the chosen vendor with a purchase order and confirm their acceptance of the terms.

**Notify Rejected Vendors**

Given- A vendor has not been selected,  
When- I finalize the supplier decision,  
Then- The system should automatically notify the rejected vendors that they were not selected and thank them for their participation.

***User Story 6-***

***Purchase Order Review and Acceptance by Vendor***

-As a vendor, I want to receive, review, and accept a purchase order so that I can confirm my participation in the procurement process.

***Acceptance Criteria***

**Receive Purchase Order Notification**

Given- I have been selected as the supplier for an RFQ,  
When- The procurement manager finalizes the selection and sends the purchase order (PO),  
Then- I should receive a notification via email or the vendor portal informing me of the new PO with a link to review it.

**Access and Review Purchase Order**

Given- I have received a notification for a new purchase order,  
When- I click the link or log into the vendor portal,  
Then- I should be able to view the full details of the purchase order, including item descriptions, quantities, pricing, delivery schedule, and payment terms.

**Accept Purchase Order**

Given- I have reviewed the purchase order and confirmed that the details are correct,  
When- I am ready to proceed,  
Then- I should be able to click an "Accept" button to formally accept the purchase order.

Given- I have accepted the purchase order,  
When- The acceptance is confirmed,  
Then- The system should update the status of the PO to "Accepted" and notify the procurement team that I have confirmed my participation in the procurement process.

**Receive Reminder to Accept PO**

Given- I have not accepted the purchase order within a specific time frame,  
When- The deadline is approaching,  
Then- The system should send me a reminder notification prompting me to review and accept the purchase order before the deadline.

***User Story 7-***

***Receipt and Inspection of Goods***

-As a warehouse manager, I want to receive and inspect goods from vendors, ensuring they meet quantity and quality specifications before accepting them into inventory.

***Acceptance Criteria***

**Receive Goods Notification**

Given- A shipment from a vendor is scheduled to arrive,  
When- The delivery is received at the warehouse,  
Then- The system should notify me of the incoming goods with details such as purchase order number, items, and quantities expected.

**Access Purchase Order and Delivery Details**

Given- I have been notified of the delivery,  
When- I log into the warehouse management system (WMS) or check the purchase order,  
Then- I should be able to view the corresponding PO details, including the items, quantities, and any quality specifications or conditions attached to the order.

**Inspect Goods for Quantity**

Given- The goods have been delivered,  
When- I begin inspecting the delivery,  
Then- I should count the received items and compare them against the purchase order quantities.

Given- There is a quantity discrepancy (over or under the ordered amount),  
When- I notice the difference,  
Then- I should document the discrepancy in the system and notify the procurement team or vendor as needed.

**Inspect Goods for Quality**

Given- The goods have been delivered,  
When- I inspect the items,  
Then- I should check for any damage, defects, or non-compliance with the quality specifications provided in the purchase order or contract.

Given- The items do not meet the quality specifications,  
When- I identify a defect or issue,  
Then- I should record the issue in the system, categorize it (e.g., damaged, incorrect item), and notify the procurement team and vendor for resolution.

**Accept Goods into Inventory**

Given- I have completed the quantity and quality inspections and there are no issues,  
When- The goods meet all specifications,  
Then- I should be able to accept them into inventory by updating the system, marking the items as "Received" and moving them to the appropriate storage location.

**Reject or Hold Goods**

Given- The goods have quantity or quality discrepancies,  
When- I decide that the items cannot be accepted into inventory,  
Then- I should be able to reject the delivery or place it on hold in the system, with reasons documented, and notify the procurement team and vendor.

**Generate Goods Receipt Report**

Given- The goods have been received and inspected,  
When- The items are accepted into inventory,  
Then- The system should generate a goods receipt report summarizing the items received, accepted, rejected, or on hold, and send it to the procurement team for review.

***User Story 8-***

***Handling Damaged or Incorrect Products***

As a warehouse manager, I want to handle damaged or incorrect products by initiating replacements, so that the correct products are available.

***Acceptance Criteria***

**Identify Damaged or Incorrect Products**

Given- Goods have been delivered to the warehouse,  
When- I inspect the items and find that they are damaged or do not match the purchase order specifications,  
Then- I should be able to flag the specific items as damaged or incorrect in the system.

**Document the Issue**

Given- I have identified damaged or incorrect products,  
When- I log the issue in the warehouse management system (WMS),  
Then- I should be able to document the nature of the problem (e.g., type of damage, incorrect item) and attach relevant details such as photos or additional comments.

**Notify Procurement Team and Vendor**

Given- I have logged damaged or incorrect products in the system,  
When- The issue is documented,  
Then- The system should automatically notify the procurement team and the vendor, providing details of the issue and initiating the replacement process.

**Initiate Replacement Request**

Given- The goods are damaged or incorrect,  
When- I submit a replacement request through the system,  
Then- The system should generate a formal request to the vendor, specifying the items that need to be replaced and the required quantities.

**Hold or Reject Damaged/Incorrect Items**

Given- The damaged or incorrect products cannot be used,  
When- I initiate the replacement request,  
Then- I should be able to hold the items in a designated "Quarantine" or "Rejected" area in the warehouse and update the inventory status to reflect that the goods are not available for use.

**Track Replacement Progress**

Given- I have initiated a replacement request with the vendor,  
When- I need to track the progress of the replacement,  
Then- The system should allow me to view the status of the request, including vendor confirmation, shipment tracking, and estimated delivery time.

**Receive and Inspect Replacement Items**

Given- Replacement goods have been shipped by the vendor,  
When- They arrive at the warehouse,  
Then- I should follow the standard process to inspect the replacement items for quantity and quality, ensuring they meet the purchase order specifications.

**Update Inventory with Replacement Items**

Given- The replacement goods have passed inspection,  
When- I accept the items into inventory,  
Then- The system should update the inventory records, marking the replacement products as "Available" and reflecting any adjustments made to the stock levels.

**Notify Procurement of Resolution**

Given- The replacement products have been accepted,  
When- The inventory is updated with the correct items,  
Then- The system should notify the procurement team that the replacement process is complete and the correct products are now available for use.

***User Story 9-***

***Invoice Generation and Receipt***

As a vendor, I want to generate an invoice for goods delivered so that I can receive timely payments.

***Acceptance Criteria***

**Access Delivered Goods Information**

Given- I have successfully delivered goods to the buyer,  
When- I log into the vendor portal,  
Then- I should be able to view all details of the delivered goods, including the purchase order number, items, quantities, and delivery confirmation.

**Generate an Invoice**

Given- The goods have been delivered and confirmed,  
When- I navigate to the invoice generation section of the vendor portal,  
Then- I should be able to select the relevant purchase order or delivery and generate an invoice based on the agreed terms, including item details, quantities, prices, and applicable taxes.

**Verify Invoice Details**

Given- I have generated an invoice,  
When- I review the invoice,  
Then- I should be able to verify that all information is accurate, including pricing, tax, and payment terms, before submitting it.

**Submit the Invoice**

Given- I have verified the accuracy of the invoice,  
When- I submit the invoice through the vendor portal,  
Then- The system should confirm the invoice submission and provide a reference number for tracking the payment process.

**Notify Buyer of Invoice Submission**

Given- I have submitted the invoice,  
When- The invoice is successfully submitted,  
Then- The system should automatically notify the buyer or procurement team that an invoice has been received for the delivered goods.

**Track Payment Status**

Given- I have submitted an invoice,  
When- I want to track the status of the payment,  
Then- I should be able to log into the vendor portal and see the current status of the invoice (e.g., under review, approved, paid), along with any expected payment dates.

**Receive Payment Notification**

Given- The invoice has been submitted and the payment is processed by the buyer,  
When- The payment is made,  
Then- The system should notify me of the payment completion, and I should be able to view the payment details (e.g., amount paid, date of payment) in the vendor portal.

***User Story 10-***

1. ***Way Matching Process for Payments***

As a finance officer, I want to conduct a 3-way matching of the purchase order, invoice, and goods receipt, so that I can ensure that payments are only made for verified and correct transactions.

***Acceptance Criteria***

**Access Purchase Order, Invoice, and Goods Receipt Information**

Given- an invoice has been submitted by the vendor,  
When- I log into the finance system,  
Then- I should be able to view the associated purchase order, invoice, and goods receipt for the transaction.

**Verify Quantities**

Given- I have access to the purchase order, invoice, and goods receipt,  
When- I compare the quantities across the three documents,  
Then- The system should verify that the quantity of goods delivered (goods receipt) matches the quantity ordered (purchase order) and invoiced (invoice).

**Verify Pricing and Total Amount**

Given- I am conducting the 3-way match,  
When- I compare the invoice with the purchase order,  
Then- The system should verify that the prices, taxes, and total amount invoiced match the pricing terms agreed upon in the purchase order.

**Identify Discrepancies**

Given- There are discrepancies in quantity, pricing, or other terms between the purchase order, invoice, and goods receipt,  
When- The system identifies a mismatch during the 3-way matching process,  
Then- The system should flag the discrepancy and notify the finance officer for further investigation before processing payment.

**Hold Payment for Discrepancies**

Given- A discrepancy is identified between the documents,  
When- The 3-way matching process flags the issue,  
Then- The system should automatically place the payment on hold and prevent any further payment processing until the discrepancy is resolved.

**Approve for Payment**

Given- The purchase order, invoice, and goods receipt match without discrepancies,  
When- The 3-way match is successful,  
Then- The system should allow the finance officer to approve the payment for processing.

**Notify Relevant Teams of Discrepancies**

Given- A discrepancy has been flagged during the 3-way match,  
When- The payment is placed on hold,  
Then- The system should notify the procurement team, warehouse manager, and vendor of the issue, allowing them to review and correct the discrepancies.

**Track Resolution of Discrepancies**

Given- A discrepancy has been identified and the payment is on hold,  
When- I need to track the status of the discrepancy resolution,  
Then- The system should provide a record of any actions taken to resolve the issue, including updates from the procurement or warehouse team.

**Finalize Payment After Resolution**

Given- A discrepancy has been resolved,  
When- I receive confirmation that the purchase order, goods receipt, and invoice now match,  
Then- I should be able to approve the payment and release it for processing.

***User Story 11-***

**Automating Payments Based on Verification**

As a finance officer, I want to automate payments once all goods are received, inspected, and the invoice matches the PO, so that vendors are paid promptly.

***Acceptance Criteria***

**Trigger Automatic Payment Process**

Given- Goods have been delivered and inspected,  
When- The warehouse team marks the goods as received and accepted in the system,  
Then- The system should automatically initiate the payment process if all conditions for payment are met (e.g. goods receipt matches the PO, and the invoice matches the PO).

**Perform Automated 3-Way Match**

Given- The goods have been received and an invoice has been submitted,  
When- The system automatically matches the purchase order, invoice, and goods receipt,  
Then- The system should confirm that the quantities, pricing, and items match across all documents.

**Proceed with Automated Payment After Match**

Given- The 3-way match between the purchase order, goods receipt, and invoice is successful,  
When- The system confirms there are no discrepancies,  
Then- It should automatically approve the payment and proceed with releasing the funds according to the vendor’s payment terms.

**Notify Vendor of Payment Initiation**

Given- The payment has been approved after the successful match,  
When- The payment process is initiated,  
Then- The system should automatically notify the vendor that the payment is being processed and provide details such as payment date and amount.

**Track Payment Progress**

Given- The automated payment process has started,  
When- I want to review the payment status,  
Then- The system should allow me to view the progress of the payment, from initiation to completion, with time stamps and reference numbers for tracking.

**Re initiate Payment After Discrepancy Resolution**

Given- A payment was on hold due to discrepancies,  
When- The issue has been resolved (e.g., quantity mismatch corrected, invoice updated),  
Then- The system should automatically re initiate the payment process and notify all relevant stakeholders.

**Generate Payment Confirmation**

Given- The payment has been processed successfully,  
When-The funds are transferred to the vendor,  
Then- The system should generate a payment confirmation that is sent to both the finance officer and the vendor, detailing the payment amount, date, and reference number.

***User Story 12-***

**Issue Resolution for Discrepancies**

-As a procurement manager, I want to resolve any discrepancies between the received goods and the PO or invoice, so that the procurement process can continue without delays.

***Acceptance Criteria***

**Identify Discrepancies**

Given- The goods have been received and the warehouse team has inspected them,  
When- There is a discrepancy between the goods received and the purchase order (PO) or invoice,  
Then- The system should flag the issue and notify the procurement manager of the mismatch (e.g., quantity, item, or pricing differences).

**Access Detailed Information**

Given- I have been notified of a discrepancy,  
When- I log into the procurement system,  
Then- I should be able to view detailed information about the discrepancy, including the purchase order details, invoice, goods receipt, and any notes from the warehouse or finance teams.

**Request Clarifications or Additional Information**

Given- A discrepancy has been identified,  
When- I require further details or clarification about the issue (e.g., damaged goods, incorrect pricing),  
Then- I should be able to send inquiries or request more information from the warehouse team, vendor, or finance team through the system’s communication channels.

**Resolve Quantity Discrepancies**

Given- The goods received do not match the quantity ordered in the purchase order,  
When- I am investigating the issue,  
Then- I should have the option to either accept the partial delivery, request additional shipments from the vendor, or return excess goods, depending on the situation and vendor agreement.

**Resolve Quality or Item Mismatches**

Given- The goods received are of the wrong specification or quality,  
When- I review the discrepancy,  
Then- I should be able to initiate a return process for the incorrect items or request a replacement from the vendor, documenting the actions taken in the system.

**Update PO, Invoice, or Goods Receipt Records**

Given- I have resolved the discrepancy with the vendor or internal teams,  
When- Changes are required to the purchase order, invoice, or goods receipt,  
Then- I should be able to update the records in the system to reflect the correct quantities, prices, or items.

**Notify Relevant Stakeholders**

Given- The discrepancy has been resolved,  
When- The records have been updated and the issue has been addressed,  
Then- The system should notify the finance team, warehouse manager, and vendor that the procurement process can continue, and payment or further action can proceed.

**Track Resolution Progress**

Given- I am working to resolve a discrepancy,  
When- I need to check the status of the resolution process,  
Then- The system should allow me to track all actions taken, including vendor responses, actions by the warehouse team, and updates to the PO or invoice.

**Escalate Unresolved Discrepancies**

Given- A discrepancy has not been resolved within a specific time frame,  
When- I am unable to reach a resolution with the vendor or internal teams,  
Then- The system should allow me to escalate the issue to senior management or initiate a formal dispute resolution process with the vendor.

**Finalize and Close Discrepancy Case**

Given- The discrepancy has been resolved and the procurement records have been updated,  
When- I confirm that no further action is needed,  
Then- I should be able to mark the discrepancy case as closed in the system, allowing the procurement process to proceed without further delays.