Purchase Orders - Quick Reference Guide

☑ Implementation Complete!

Purchase Orders are now automatically generated when MD approves requisitions and are accessible through a new "Purchase Orders" section.

How to Access Purchase Orders

1. Login to System

- Use your credentials to login

2. Navigate to Purchase Orders

- Click **"📄 Purchase Orders"** in the left sidebar
- Located between "Requisitions" and "Budgets"

3. View Your POs

- See table with all POs you have access to
- Click **"⬇ Download PDF"** to download any PO

Who Can See What?

Your Role	What You See
Procurement	All Purchase Orders (to distribute to vendors)
Finance	All Purchase Orders (for financial oversight)
MD	All Purchase Orders (executive view)
HOD	Only POs from requisitions you approved
Initiator	Only POs from your own requisitions
Admin	All Purchase Orders

How POs Are Created

Automatic Process:

1. Initiator creates requisition → Submit
2. HOD approves → Moves to Procurement
3. Procurement adds pricing → Moves to Finance
4. Finance approves → Moves to MD
5. **MD approves → PO automatically generated!** ☑

PO Number Format: `PO-202510-KSB-IT-JB-20251030123456`

How to Download a PO

1. Go to "Purchase Orders" in sidebar
2. Find the PO you want in the table
3. Click the blue **"⬇ Download PDF"** button
4. PDF will download automatically
5. Open the PDF to view complete details

What's in the PDF?

The PO PDF includes:

- **Header:** PO Number and Date
- **From:** Company Information (Kabwe Sugar Brokerage Ltd)
- **To:** Vendor Information (name, email, phone)
- **Requisition Details:** Req #, Description, Department, Delivery, Date, Urgency
- **Items Table:** Item names, quantities, unit prices, totals
- **Grand Total:** Total amount in ZMW
- **Approval Chain:** Complete list of who approved (HOD, Procurement, Finance, MD)
- **Footer:** Generation timestamp

Testing the System

Quick Test (5 minutes):

1. **Create Requisition** (as Initiator)

   - Login: `john.banda / password123`
   - Create & submit requisition

2. **Approve as HOD**

   - Login: `mary.mwanza / password123`

- Approve requisition

3. **Process as Procurement**

    - Login: `james.phiri` / `password123`
    - Add vendor & pricing, submit

4. **Approve as Finance**

    - Login: `sarah.banda` / `password123`
    - Approve requisition

5. **Final Approval as MD**

    - Login: `david.mulenga` / `password123`
    - Approve requisition
    - **PO is automatically created!**

6. **View PO** (as any role)

    - Click "Purchase Orders" in sidebar
    - See the new PO in table
    - Click "Download PDF"
    - Open and verify PDF content

Troubleshooting

Q: I don't see "Purchase Orders" in the sidebar

- **A:** Make sure you're logged in as one of these roles: Initiator, HOD, Procurement, Finance, MD, or Admin

Q: "No Purchase Orders Found" message

- **A:** No requisitions have been fully approved by MD yet. Complete the workflow above to generate your first PO.

Q: I can't see a specific PO

- **A:** You may not have access to that PO based on your role:

    - Initiators only see their own POs
    - HODs only see POs they approved
    - Procurement/Finance/MD/Admin see all POs

Q: PDF download isn't working

- **A:** Check your browser's download settings and popup blocker. Try a different browser if the issue persists.

System URLs

- **Backend:** http://localhost:3001
- **Frontend:** http://localhost:3000 (or your configured URL)
- **API Health Check:** http://localhost:3001/api/health

Default Login Credentials

```
Initiator:    john.banda      / password123
HOD:          mary.mwanza     / password123
Procurement:  james.phiri     / password123
Finance:      sarah.banda     / password123
MD:           david.mulenga   / password123
Admin:        admin           / admin123
```

Features Summary

- ☑ **Automatic PO Generation** - Created when MD approves
- ☑ **Role-Based Access** - Users see only relevant POs
- ☑ **PDF Download** - Professional format with all details
- ☑ **Sidebar Navigation** - Easy access from any page
- ☑ **Audit Trail** - All downloads logged
- ☑ **Security** - Access controlled by backend

Support

For detailed documentation, see:

- `PURCHASE_ORDERS_IMPLEMENTATION.md` - Complete technical documentation
- `WORKFLOW_GUIDE.md` - Full workflow explanation

Last Updated: October 30, 2025
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Version: 1.0