

3-Form Quote Upload & Manual Adjudication - Implementation Complete

Overview

Successfully implemented a 3-form side-by-side quote upload system with vendor dropdown selection and fully manual adjudication process.

Changes Implemented

1. Backend Changes

File: backend/routes/quotesAndAdjudications.js

Lines 69-76:

- Made vendor_id **optional** (no longer required)
- Auto-generates vendor_id from vendor_name if not provided
- Fixed "Vendor ID required" error
- Updated error message to reflect only vendor_name and quote_amount are required

```
// Old: Required vendor_id, vendor_name, quote_amount
// New: Required vendor_name, quote_amount only
const actualVendorId = vendor_id || vendor_name.toLowerCase().replace(/\s+/g, '_');
```

2. Frontend Changes

File: frontend/app.js

A. State Management (Lines 6187-6218)

Added:

- vendors **state** - stores active vendors from database
- quote1, quote2, quote3 **states** - separate state for each quote form
- Removed old single uploadForm state

New Structure:

```
const [vendors, setVendors] = useState([]);
const [quote1, setQuote1] = useState({ vendor_id: '', vendor_name: '', quote_number: '', quote_amount: '', currency: 'ZMW', notes: '', file: null });
const [quote2, setQuote2] = useState({ ... });
const [quote3, setQuote3] = useState({ ... });
```

B. Vendor Loading (Lines 6240-6251)

Added:

- loadVendors() function
- Fetches active vendors from /api/vendors
- Loads on component mount

C. Handler Functions (Lines 6294-6370)

Added:

- handleVendorChange(quoteNum, vendorId) - Updates vendor selection for specific quote
- handleFileChange(e, quoteNum) - Handles PDF upload for specific quote
- handleUploadAllQuotes(e) - Validates and uploads all 3 quotes at once

Key Features:

- Validates all 3 quotes are complete before upload
- Uploads sequentially
- Resets all forms after successful upload
- Shows success message

D. 3-Form Upload UI (Lines 6476-6706)

Replaced: Single sequential form → 3 side-by-side forms

New Layout:

- **Grid:** 3 columns (Quote 1 | Quote 2 | Quote 3)
- **Color-coded borders:** Purple, Green, Orange
- **Each form has:**
 - Vendor dropdown (from database) *
 - Quote Number
 - Quote Amount *
 - Currency dropdown (ZMW, USD, EUR, ZAR)
 - PDF File upload *
 - Notes textarea

Submit: Single "Upload All 3 Quotes" button at bottom

E. Quotes Summary Display (Lines 6745-6766)

Added before adjudication form:

- Shows all 3 uploaded quotes in 3-column grid
- Displays: Vendor name, Amount, Quote #, Notes
- Download link for each PDF
- Allows procurement to reference while writing adjudication

F. Manual Adjudication Form (Lines 6776-6831)

Updated to be fully manual:

Changed:

- Vendor selection NO longer auto-populates amount
- Recommended Amount field is now **editable** (not read-only)
- Procurement must manually enter the amount
- Added currency selector field
- Added instruction banner: "💡 Manually enter your analysis below..."

Form Fields:

- Recommended Vendor * (dropdown - just shows vendor names)
 - Recommended Amount * (manual entry)
 - Currency (dropdown)
 - Executive Summary * (textarea)
 - Evaluation Criteria (textarea)
 - Technical Compliance (textarea)
 - Pricing Analysis (textarea)
 - Delivery Terms (textarea)
 - Payment Terms (textarea)
 - Recommendation Rationale * (textarea)
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Workflow Summary

For Procurement:

1. **Select Requisition** (HOD-approved, status: pending_procurement)
2. Click **"Upload Quote"** button
3. **Fill 3 Forms Side-by-Side:**
 - Select vendor from dropdown for each
 - Enter quote amounts
 - Upload PDF files
 - Add notes if needed
4. Click **"Upload All 3 Quotes"**
 - System uploads all 3 sequentially
 - Success message appears
 - Forms reset
5. **Review Quotes Summary**
 - 3 quotes displayed in grid
 - Can view PDFs
6. Click **"Create Adjudication"**
7. **Manually Fill Adjudication Form:**
 - Select recommended vendor
 - **Manually enter** recommended amount
 - Write executive summary
 - Provide pricing analysis
 - Add recommendation rationale
 - Fill other fields
8. **Submit Adjudication**
 - Status changes to pending_finance
 - Sent to Finance Manager

For Finance Manager & MD:

1. **Review in "Pending Requisitions"**
 2. See **"Vendor Quotes & Adjudication"** section:
 - All 3 quotes displayed with download links
 - Complete adjudication summary shown
 - Can review procurement's analysis
 3. **Approve or Reject**
-

Key Features

☒ Vendor Database Integration

- Dropdowns populated from active vendors in database
- Consistent vendor selection across system
- No manual typing errors

☒ 3-Form Parallel Entry

- All 3 quotes visible at once
- Easy comparison while entering
- Single submit for all

☒ Manual Adjudication

- Procurement writes their own analysis
- No auto-population of amounts
- Professional assessment required
- All fields editable

☒ Quotes Reference Display

- Summary shown before adjudication form
- Side-by-side comparison
- PDF download links
- Quote details visible

☒ Validation

- All 3 quotes required
- Vendor, amount, PDF mandatory
- Clear error messages

Testing Instructions

1. **Refresh browser** at `http://localhost:3001`
2. **Log in as Procurement user**
3. **Navigate to "Quotes & Adjudication"**
4. **Select a requisition** with status "pending_procurement"
5. **Click "Upload Quote"**
6. **Test the 3-form layout:**
 - Select different vendors for each
 - Enter amounts
 - Upload 3 PDF files
 - Click "Upload All 3 Quotes"
7. **Verify quotes appear** in summary
8. **Click "Create Adjudication"**
9. **Test manual entry:**
 - Select recommended vendor
 - Manually type amount (verify it's editable)
 - Fill in analysis fields
 - Submit
10. **Log in as Finance Manager**
11. **Go to "Pending Requisitions"**
12. **Select the requisition**
13. **Verify quotes and adjudication display** in approval view

Files Modified

1. `backend/routes/quotesAndAdjudications.js` - Backend fix
2. `frontend/app.js` - Complete UI redesign

Status: ☒ **COMPLETE & READY TO TEST**

All requested features implemented:

- ☒ 3 side-by-side quote forms
- ☒ Vendor dropdown from database
- ☒ Upload all 3 at once
- ☒ Quotes summary display
- ☒ Fully manual adjudication
- ☒ Finance/MD can view everything

Backend restarted and running on `http://localhost:3001`