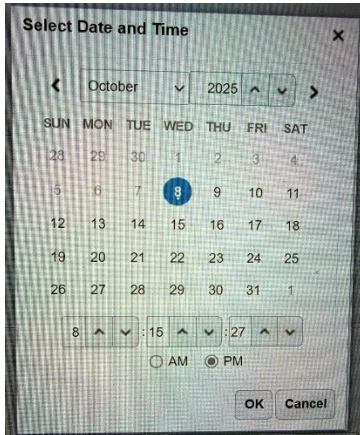
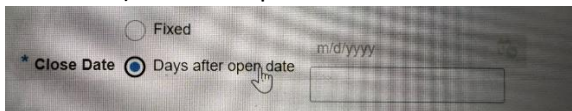


RFQ PROCESS TESTING:

- 1) RFQ ID NEEDS TO BE AUTOPOPULATED AS SOON AS A DRAFT IS CREATED
- 2) **New:** Create a Open Date field as well post which only the event will be published to supplier. Adding can we also one widget which captures date & Time together. Ensure it doesn't allow any past date.



- 3) Close Date – Restrict date in the past to be selected and same as above try to make in same widget. **New:** Can we have the option to choose between fixed or days after open date option here ? Example either the user can have a fixed closed date by choosing the date & time option or when he selects days after open date lets say (3) system should automatically calculate the days (working days) and then finalize the close date. If user chooses days that field should be restricted to numbers.
- 4) **New:** Category should be in header level and automatically capture suppliers (instead of keeping in bottom) move to up .

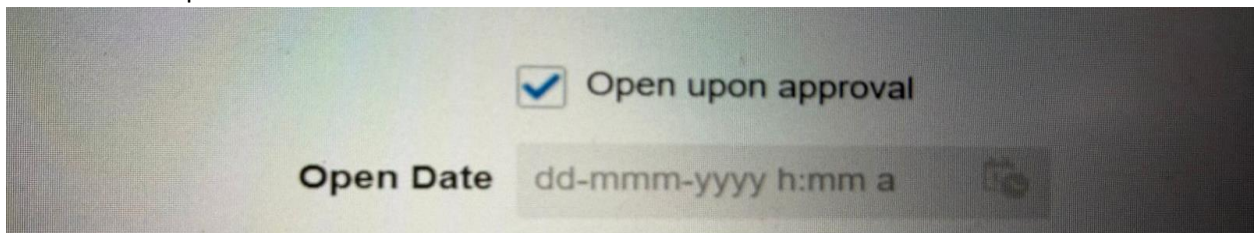


- 5) **New:** Create a new field titled “Negotiation Controls – Response Visibility (Option to choose sealed / unsealed) default to be sealed. Behaviour of sealed – When supplier submits bid the buyer (who creates event) wont be able to see the price until the event is closed (why ? because it will create a bias). Unsealed – Buyer can anytime see the price of the event during the event.
- 6) Close Time – How does close time work on different time zones ?
- 7) **New:** Add incoterms on the header level (EXW, FCA, CPT, CIP, DAP, DPU, DDP, FAS, FOB, CFR, CIF)
- 8) **New:** Remove “Urgency” Tab
- 9) Request Items Tab: **New:** Add header's in the section column
 - a) First field should be “Line no” – System autopopulates each time a line is added as 1 , 2, 3 . then “Line type” (drop down – Goods/ Services / Consultancy / Works / Lump-sum / Rate Based) – Option to keep any one field as default on the admin console, Then “Item number” field (integrated to any system), ~~Remove “manufacturer part number”~~ and add it as “Brand/Manufacturer”, Include “Origin” field (drop down list of all countries), Field Name for Qty – “Est. Qty”. Then add “ “current price”, “Target/Benchmark Price” (AI suggests this price on the currency chosed automatically)“UOM” , PR Value

- b) Sequence can be like this - Line No, Line Type, Item Number, Item Description, Brand / Manufacturer, Origin, Est. Qty, UOM, Current Price, Target / Benchmark Price, PR Value
- c) Enhance the Excel template based on the above inputs.

Internal Part No	Manufacturer	Mfg Part No	Description	Select UOM	50	Delete
Internal Part No	Manufacturer	Mfg Part No	Description	Select UOM	0	Delete

- 10) Preferred Delivery Date - Restrict date in the past to be selected and also change the field name to "Need by Date". Also is it possible to restrict need by date after "close date" ??
- 11) Uom (extract from this list for the drop down) - <https://hc.ariba.com/index.html?sap-ui-language=en#/item/KB0395486> (keep it as configurable at admin level for now keep it like this - EA, BOX, PKG, KG, G, L, ML, M, CM, FT, SQM, CBM, HR, DAY, LOT, SET, PAIR, ROLL, PC.)
- 12) Requester Reference – Field mostly will be a coming in from Intake tool or should be able to integrate from a different system (keep in mind)
- 13) Carrier – Configurable list at admin console (– DHL, DSV, etc
- 14) Payment Process- Credit Card / Electronic Payment
- 15) **New**: Option to save this event as draft (lets say I am creating and I am busy doing others stuffs. I should have this option at the top to save / cancel / submit rfq
- 16) **New**: Send for approval button (keep a default checkbox in the top like below.)
- 17) And also on the top header level keep this section (it should have a relationship with the open date field) if open upon approval is selected then a workflow should trigger and once approved then the event wwill be published.



- 18) **New**: In admin module – create approval work flow option .

Workflow Design Requirements – RFQ Lifecycle

1. Event Creation Workflow (only if open upon approval selected)

Trigger: User clicks “Submit RFQ” or “Send for Approval” after completing the draft.

Objective: Ensure that RFQs follow the configured approval route before publishing, and respect Open Date logic.

Flow:

1. Draft Creation:

- RFQ ID auto-generated.
- User can “Save Draft” or “Send for Approval.”

2. Approval Evaluation:

- System checks configured approval rule sets in Admin Module:
 - Criteria: Estimated Event Value, Category, Response Visibility, PR Value, etc.
- Routes approval tasks to mapped approvers (Procurement Head, Finance, Legal, etc.).

3. Upon Approval:

- If “**Open upon approval**” is checked → RFQ status changes to *Approved* → *Published*.
- Event becomes visible to suppliers only after reaching the **Open Date** and time.

4. Rejection / Changes:

- If rejected → back to Draft with comments.
- If changes made during approval → trigger *Re-approval* workflow.

Admin Configurations:

- Approval routing table (roles/users vs. thresholds).
 - SLA timers per approval stage.
 - Escalation rules.
 - “Auto-publish upon approval” toggle.
-

2. Award Approval Workflow

Trigger: Buyer finalizes supplier evaluation and clicks “**Award Recommendation**”.

Flow:

1. Buyer selects supplier(s) for award → enters justification.
2. System checks **Award Approval Rules**:
 - Value threshold.
 - Category / Entity.
 - If split award, requires higher-level approval.
3. Approval workflow initiated → sequential or parallel (as per admin setup).
4. Upon approval → event status changes to *Awarded*.
5. Notification sent to:
 - Winning supplier(s)
 - Unsuccessful supplier(s)
 - Internal stakeholders (Procurement Head, BU, Finance)

Admin Configurations:

- Separate rule set for **Award Approval** (distinct from event creation).
- Notification mapping for “Award Approved” and “Award Rejected.”

3. Event Modification Workflow (When Event is Live)

Trigger: Buyer clicks “**Edit Event**” on an already published RFQ.

Flow:

1. System pauses event temporarily and logs change request.
2. Editable fields: Close Date, Line Items, Target Price, Visibility, etc. (controlled by Admin).
3. On modification, workflow triggers:
 - “Event Modification Approval” with details of what changed.
4. Once approved:
 - Event resumes with updated details.
 - Automatic notification sent to all participating suppliers:
 - Subject: “RFQ Updated – Please review latest details.”
5. If rejected → event resumes with old configuration.

Admin Configurations:

- Define which fields require re-approval.
 - Define approver list for modification requests.
 - Enable/disable supplier notification toggle.
-

4. Pause Event Workflow (New Feature)

Trigger: Buyer clicks “**Pause Event**” from the event dashboard.

Flow:

1. Buyer selects reason from a predefined dropdown list:
 - Examples: “Technical Issue,” “Supplier Query Under Review,” “Internal Clarification,” etc.
2. System sends **pause notification** to:
 - All suppliers linked to event.
 - Internal stakeholders (as configured).
3. System status changes to *Paused*; supplier portal disables bid submission temporarily.
4. When resumed:
 - Buyer clicks “Resume Event.”
 - New notification sent to suppliers → “Event has been resumed.”

Admin Configurations:

- **Pause Reason List** (editable in admin console).
- **Notification Recipients** (emails or roles).
- **Approval Flow for Pause/Resume** (optional):
 - Can be toggled ON/OFF.
 - If enabled, pause request goes for approval (Procurement Head / Category Lead).

□ 5. Admin Console Configuration Summary

Module	Configurable Elements	Description
Approval Rules	Thresholds, Categories, Entity, Currency, Response Visibility	Separate rule sets for Event Creation, Award, Modification, Pause
Notification Mapping	Trigger Event → Recipients	Supports supplier + internal groups
Pause Reasons	Editable list	“System Issue,” “Awaiting Clarification,” etc.
Editable Fields on Modification	Checkbox per field	Admin decides what changes trigger re-approval
SLA & Escalation	Approver Stage Timers	Set due-by time and escalation chain
Auto-Publish Logic	Boolean flag	Publishes automatically once approved if open date/time reached

⚙ 6. Workflow State Transitions

From	To	Trigger	Condition
Draft	Pending Approval	Send for Approval	Draft validated
Pending Approval	Approved	Approver(s) action	All approvals complete
Approved	Published	Auto (if “Open upon approval”) or manual	System time \geq Open Date
Published	Paused	Buyer action	Pause reason selected
Paused	Published	Resume Event	Approval (if configured)
Published	Closed	Close Date reached	Auto close
Closed	Awarded	Award approval complete	Post-approval
Any	Cancelled	Buyer cancels	Manual action