**Business Process Flow of Procurement**

**Masters screens :** Before any transaction master records should be created so that it can be used in subsequent transaction screens. Following are the masters screen where data has to be created first.

**Roles:** The below screens are accessible to GM-Procurement & Contract Management, Purchase Manager, Stock manager, Trainer

Item group, Item Item price, Price list UOM, Store Type, Store Supplier, Supplier Group

Fill all the master data

**Transaction screens** : these screens will be followed by master screens once all the master data records has been created and it will be fetched in the transaction screens wherever needed.

**Process flow for (Buying) procuring any item:** This process involves creating new purchase requisition, creating a request of quotation of any item from the supplier/vendor, supplier respond with the quoted price.

Then purchase order is created for procuring the item and final process is purchase receipt which will

be generated and purchase invoice will be given to the respective procuring client.

**Roles:** The below screens are accessible to GM-Procurement & Contract Management, Purchase Manager, Stock manager, Trainer, Dy Director,Director,Course Manager,Board of Directors, CFO, Principal, Dy Principal, CEO

**Prerequisites:** it is assumed that master screens such as Item, item group, Item price, Price-list, UOM, Store, Store Type and supplier & supplier group has already been created as the foundation of procuring the item.

Purchase RequisitionRequest for Quotation Supplier Quotation Purchase Order Purchase Receipt

Purchase Invoice

**Process flow for Item Quality Inspection :** This process involves the quality inspection of procured goods/items based upon the criteria such as item should be defect/damage free, durable, effective & efficient and should function properly which guarantees that the procured items meet the required standards, specifications and expectations.

**Roles:** The below screens are accessible to GM-Procurement & Contract Management, Purchase Manager, Stock Manager

**Prerequisites:** it is assumed that Procuring of item such as Purchase Requisition, Request for Quotation, Supplier Quotation, Purchase Order, Purchase Receipt and Purchase Invoice has already been created as the foundation for Quality check of the item. Quality Inspection TemplateQuality Inspection Parameter

**Process flow for Stock Transactions:** In this process the stock entry of procured items/goods is being done in order to maintain the inventory so that a regular monitoring of stock balance is obtained. And a brief summary report of stock can be analyzed to optimize procurement process.

**Roles:** The below screens are accessible to GM-Procurement & Contract Management, Purchase Manager, Stock Manager

**Prerequisites:** it is assumed that Quality inspection of item such as Quality inspection Template, Quality Inspection Parameter has already been created and Quality check has performed as the foundation for the Inventory (Stock management) processing of the item. Stock Entry Stock Balance Stock Ledger Stock summary Stock Settings

**Process flow for Assets:** Here the assets are defined and categorized based on the type of procured items and the asset location is decided which assets belongs to which location and asset movement from one location to another location. Assets are the organizations property which can be utilized in operations.

**Roles:** The below screens are accessible to GM-Procurement & Contract Management, Purchase Manager, Stock Manager

**Prerequisites:** it is assumed that Stock Transaction of item such as Stock entry, Stock balance, ledger and settings has already been created and as the foundation for the Asset.

Asset Location Asset Category Asset movement

**Process flow for Asset Maintenance:** This process involves the maintenance of the assets which are the valuable items owned by any organization, by deploying the maintenance team who can regularly monitor the working condition and then maintenance log is prepared for record keeping and auditing purposes, and if any asset is damaged then Asset Repair will be formed.

**Roles:** The below screens are accessible to GM-Procurement & Contract Management, Purchase Manager, Stock Manager

**Prerequisites:** it is assumed that procured items are fixed Assets of organization such as Asset, Location, Asset category has already been created and as the foundation for the Asset maintenance.

Asset Maintenance Team Asset Maintenance Asset Maintenance log Asset Repair

**Process flow for Tax Masters :** This process involves the creation of Purchase Tax and charges template which will be applied on procured Items/goods, also all the item will be categorized under a particular Tax category, and if any Tax withhold is required on any item then Tax withholding category will be created along with Terms and conditions applied on that particular type of item.

**Roles:** The below screens are accessible to GM-Procurement & Contract Management, Purchase Manager, Stock Manager

**Prerequisites:** it is assumed that maintenance of Assets which belong to an organization such as Asset Maintenance Team, Asset Maintenance, Asset Maintenance log and Repairing of asset has already been done as the foundation for the Taxation.

Purchase Taxes & Charges Template Item wise tax category Terms & conditions Tax withholding category

**Process flow for Batching and serialization :** In this processthe serial no and batch are created and assigned to the bundle of items based upon their type.

**Roles:** The below screens are accessible to GM-Procurement & Contract Management, Purchase Manager, Stock Manager

**Prerequisites:** it is assumed that Taxation of Assets that belongs to an organization such as Tax category, Tax withholding category Terms and conditions has already been done as the foundation for assigning the serial No. & batch.

Serial No. Batch

**Process flow for Payment Term of procured items :** In this process the payment terms and policy are created which will be applied on the items/goods while procuring them in order to track the payment status and for budgeting purposes.

**Roles:** The below screens are accessible to GM-Procurement & Contract Management, Purchase Manager, Stock Manager

**Prerequisites:** it is assumed that Taxation of Assets that belongs to an organization such as Tax category, Tax withholding category Terms and conditions has already been done as the foundation for assigning the serial No. & batch.

Payment Term Payment Term Template

**Process flow for Buying setting & contract :** Buying setting is the process which defines the properties which will be applied on the Buying (Procuring) transactions and can be contacted over the email to procurement & inventory management department.

**Roles:** The below screens are accessible to GM-Procurement & Contract Management, Purchase Manager, Stock Manager

**Prerequisites:** it is assumed that the item has been procured and all the stock Transaction has been done.

Buying Settings Procurement & Inventory management department email

**Process flow for contract :** The contract will be created between both the parties who is procuring and who is supplying the the items to the procurement department.

**Roles:** The below screens are accessible to GM-Procurement & Contract Management, Purchase Manager, Stock Manager

**Prerequisites:** it is assumed that the Buying settings has been created which is applied for buying the items so to maintain the contract agreement between both the parties contract is utilized.

Contract Contract Template

**Process flow for Report Generation :** In this process three types of report will be generated based upon the default filters. Price Empanelled report is detailed report of Total item price list, Asset summary report is detailed report of Total Assets List & L1 vendor selection report is purchase requisition, request for Quotation & supplier list.

**Roles:** The below screens are accessible to GM-Procurement & Contract Management, Purchase Manager, Stock Manager

**Prerequisites:** it is assumed that the Buying settings has been created which is applied for buying the items so to maintain the contract agreement between both the parties contract is utilized.

Price Empanelled report Asset summary report L1 vendor selection report