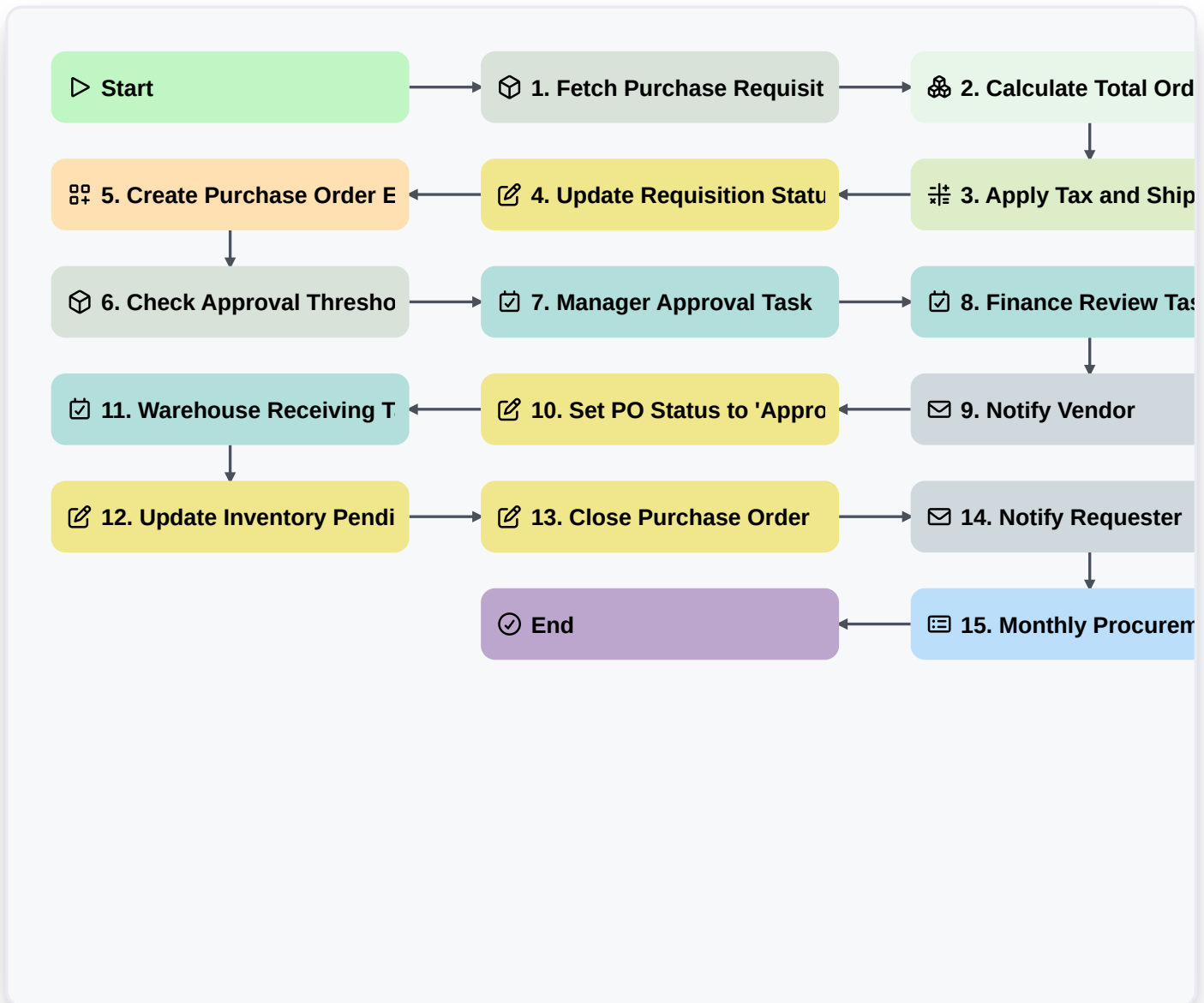


Purchase Order Management Workflow



▷ Start

Start of the Workflow/Process.

📦 1. Fetch Purchase Requisition

Retrieve the initial requisition details and requested items from the Requisition Data Model.

🧮 2. Calculate Total Order Value

Sum the line item prices from the requisition to determine the total monetary value of the PO.

🧮 3. Apply Tax and Shipping

Calculate the final total by adding tax percentage and shipping fees to the aggregated subtotal.

✍️ 4. Update Requisition Status

Update the status of the original requisition to 'In Approval Process'.

📦 5. Create Purchase Order Entry

Generate a new record in the Purchase Order Data Model using the validated requisition data.

📦 6. Check Approval Thresholds

Retrieve the company's delegation of authority limits from the Settings Data Model.



📌 **7. Manager Approval Task**

Create a task for the Department Manager if the total value exceeds the local budget threshold.

📌 **8. Finance Review Task**

Create a task for the Finance Team for all POs above a specific high-value threshold.

✉️ **9. Notify Vendor**

Send an email to the selected vendor with the finalized PO details and attachments.

✍️ **10. Set PO Status to 'Approved'**

Update the Purchase Order entry status to 'Approved' once all required tasks are completed.

📌 **11. Warehouse Receiving Task**

Create a task for the Warehouse Clerk to notify them to expect a delivery.

✍️ **12. Update Inventory Pending**

Update the Inventory Data Model to reflect 'Incoming' stock quantities.

✍️ **13. Close Purchase Order**

Update the PO status to 'Closed' once the goods have been received and the invoice is matched.

✉️ **14. Notify Requester**

Send an email to the original requester confirming that the order has been fulfilled.

📄 **15. Monthly Procurement Report**

Generate a monthly summary report of all completed POs, total spend, and vendor performance.

🏁 **End**

End of the Workflow/Process.