User Guide
v1.5

1. ProcuMan Software

ProcuMan Software is based on open source SuiteCRM platform and it has been configured to support wide range of procurement management processes. SuiteCRM provides a flexible platform with possibility for unlimited customisations. Customers are able to add new fields or even create completely new forms and reports without the need for programming.

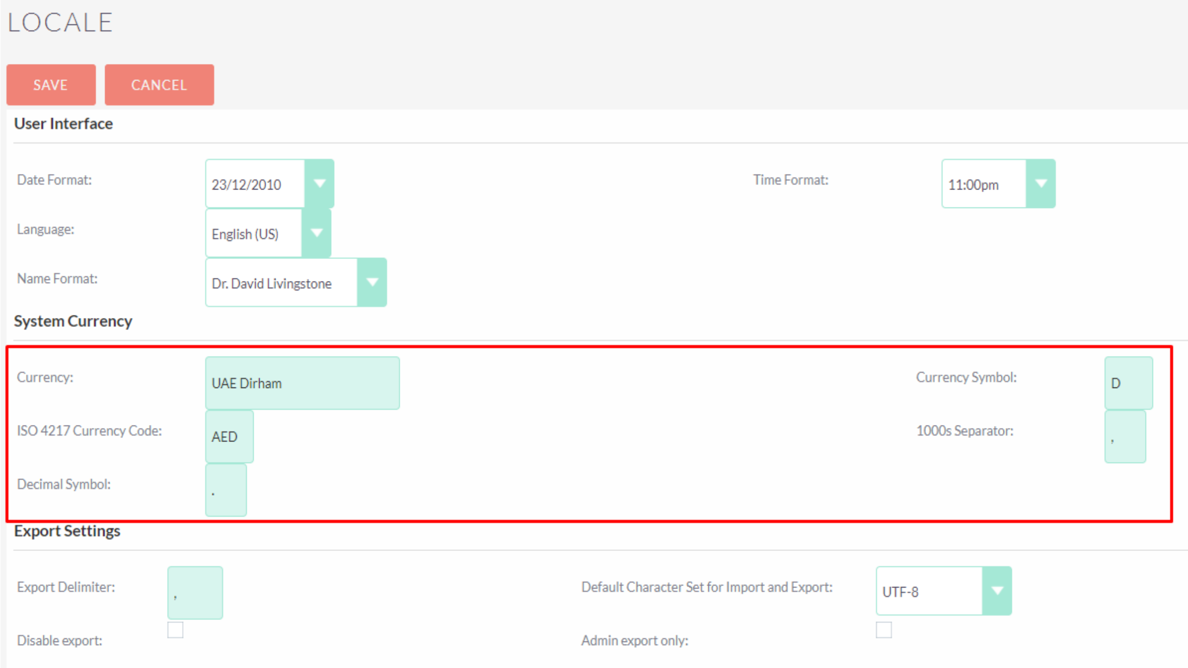
SuiteCRM provides language support for several different languages. However, ProcuMan software has been configured only for English language. Customers can do own translations with the Studio-module in SuiteCRM’s administration module. Languages are activated at Admin→Languages.

2. System Setup

Before starting to use a new system, following system configurations are needed:

1. Enter the company default currency: Admin -> Locale -> Currency
2. Enter exchange rates for other purchasing currencies against your company default currency (allows consolidated reporting): Admin → Currencies
3. Upload your company logo: Admin → System Settings
4. Update the Branches module for company's delivery locations and bill-to addresses
5. Create new users and user groups: Admin → User Management. Assign each user to a group and to a role. (see „Approval Process for Purchase Requests“-document)

Picture 1:



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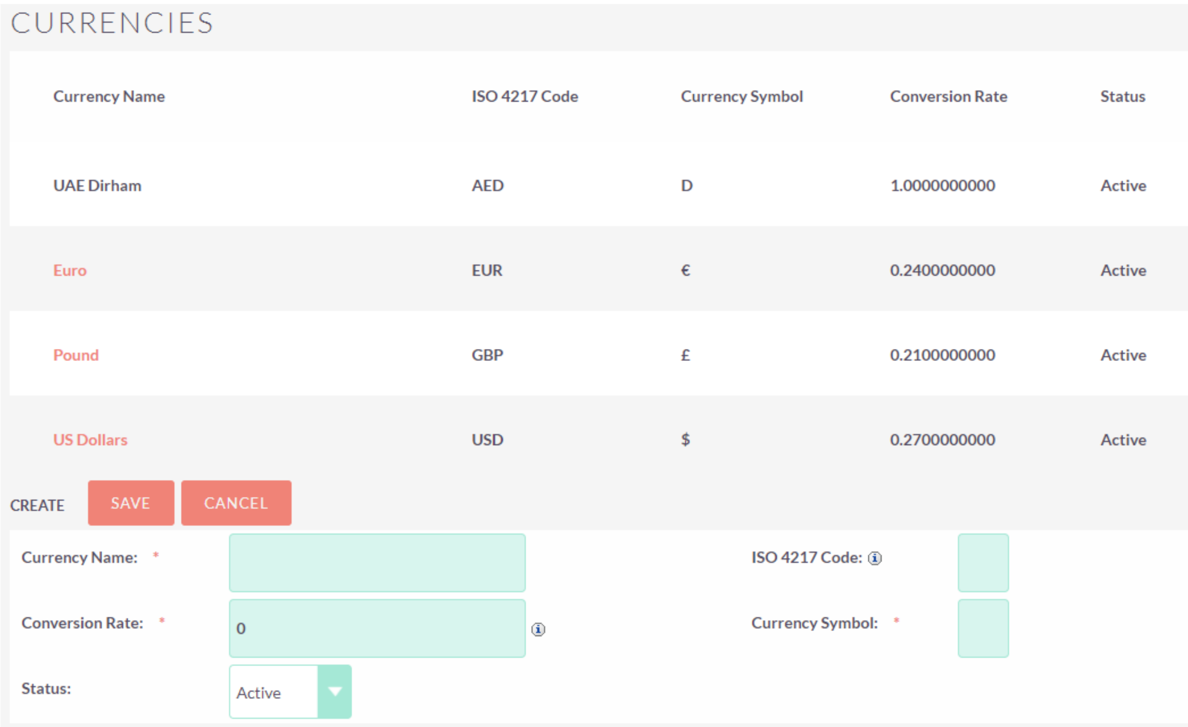

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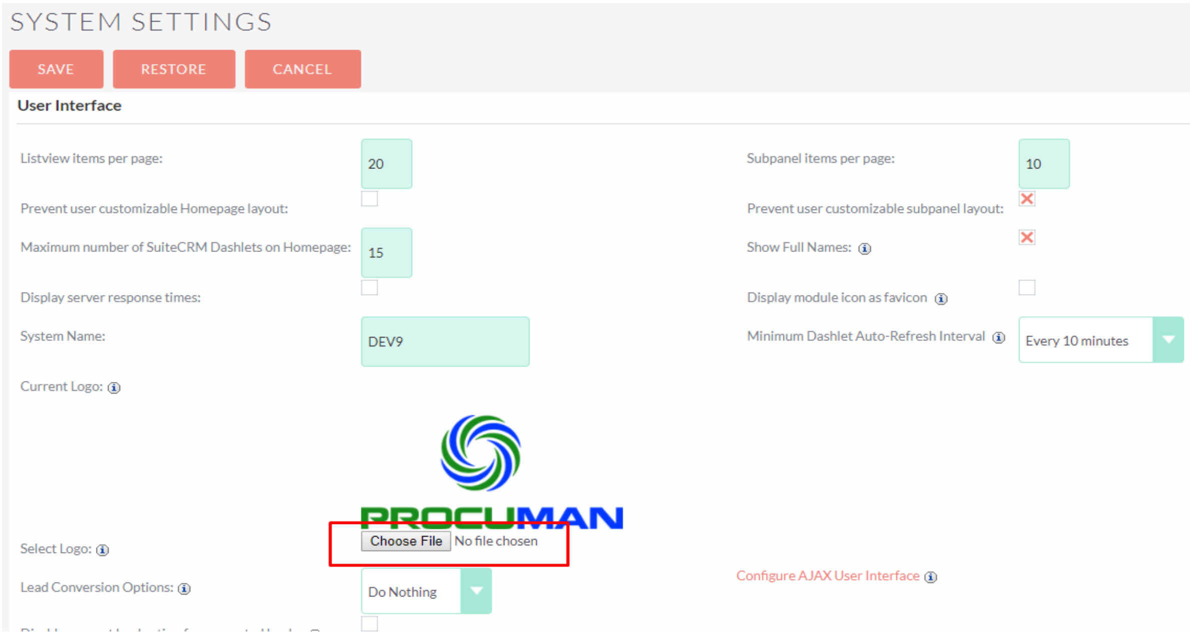

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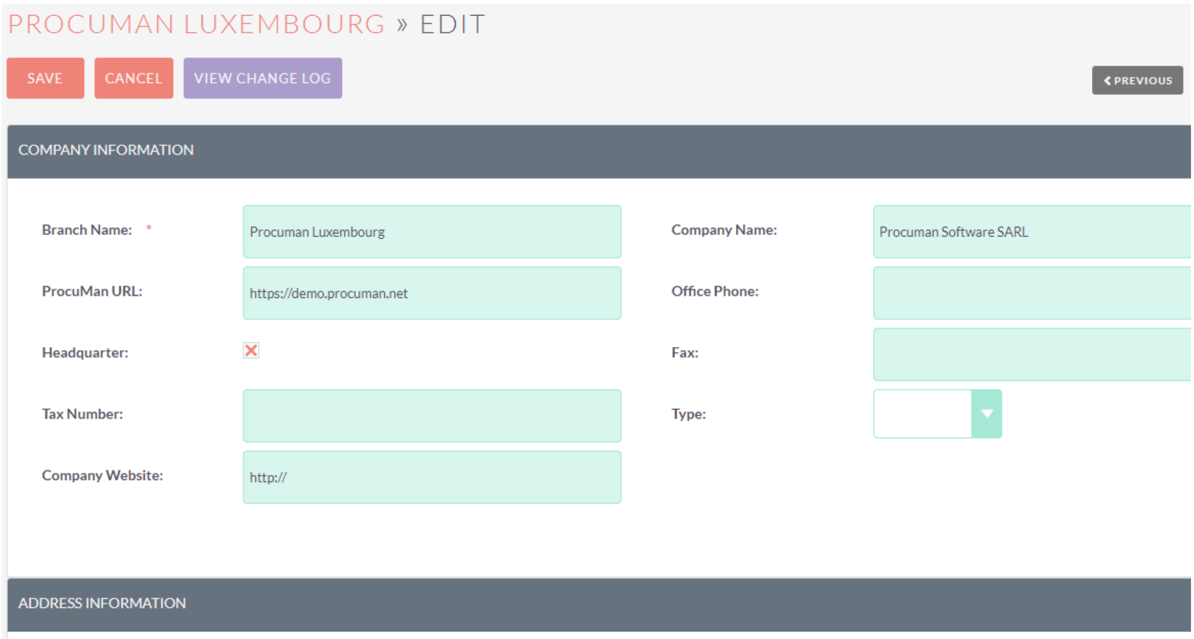

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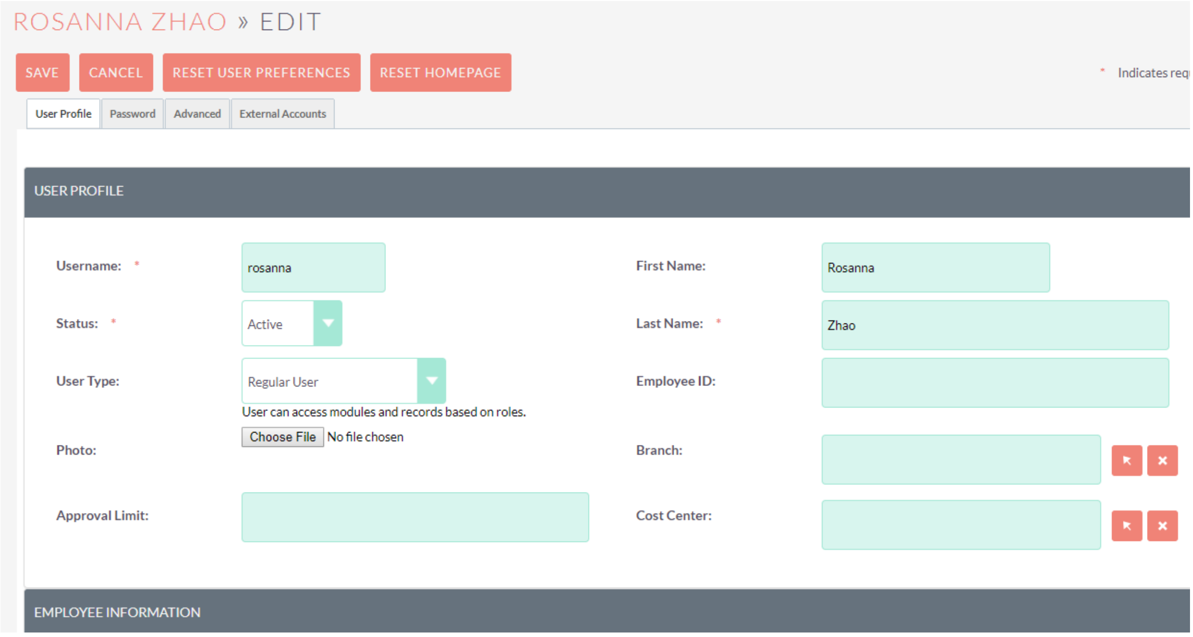
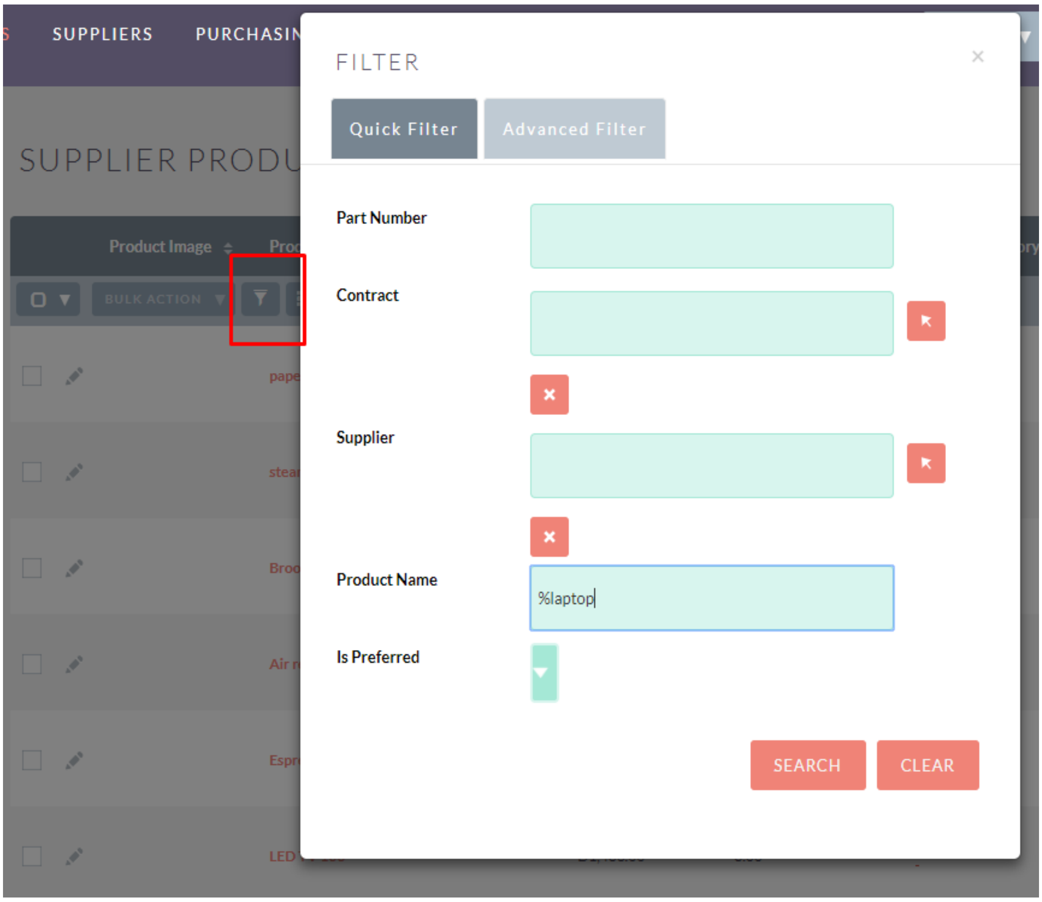


3. Software Modules

ProcuMan software modules supports following procurement processes (see separate document for the Purchase Requests-module):

General:
Any list view search filter accepts the „%“ character as wild card.



Suppliers

All vendor related information is entered in Vendors-module. Write access for users with “Purchasing Agent”-role.

Notable Fields:

Supplier email address – This is used as the default addess to send the RFQ – request for quotation (see RFX-module). T

Credit Limit – This field is used to tract the amount of vendor credit available for purchases.

Trade Licence Expiry Date - this is used to exclude all suppliers products from purchases after the date has expired.

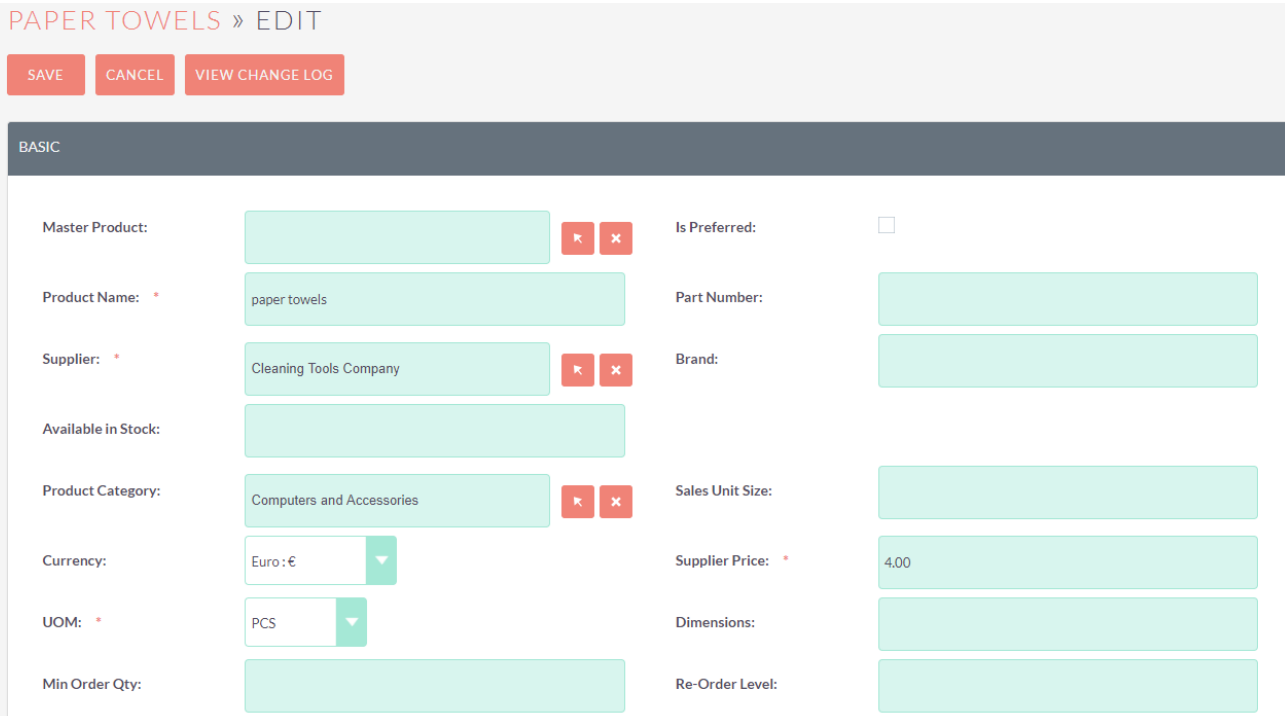
Contacts

Business contact information for Vendors is stored in Contacts-module. Write access for users with “Purchasing Agent”-role.

Products

All products for each vendor are entered in Products-module. It includes product documentation, pictures and pricing of each quoted product. Write access for users with “Purchasing Agent”-role.

Product module’s subpanel „Stock Withdrawal“ will adjust the Product‘s inventory levels based on the number of items withdrawn. Goods Receipt module will increase the number of available stock after new goods arrival. Inventory level can also be entered directly in the „Available In Stock“-field.



Scouting

Activities for new product searches and vendor visits can be logged to the Scouting-module. Write access for users with “Purchasing Agent”-role.

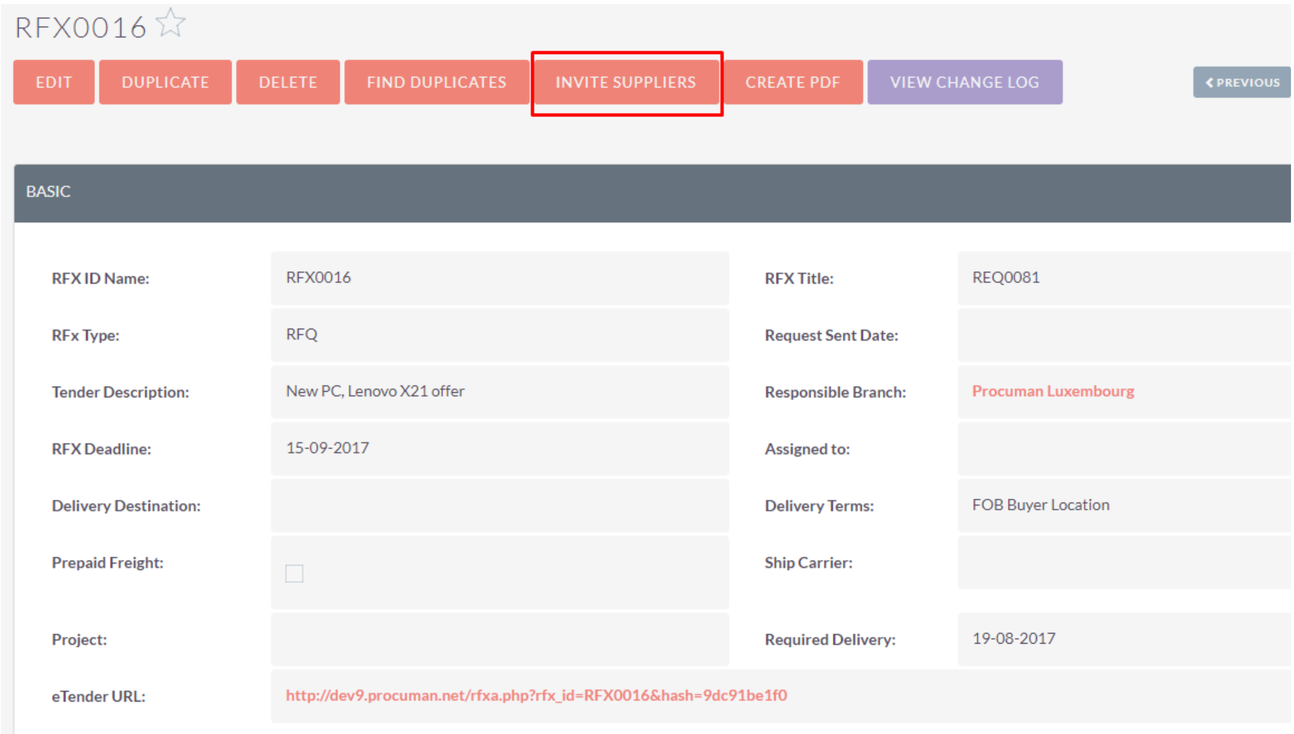
RFX - eTendering

Request for Information (RFI), Request for Proposal (RFP) and Request for Quotation (RFQ) and the associated vendor answers (RFIA, RFPA, RFQA) can all be recorded to ProcuMan’s Rfx-module. RFX can be automaticly created from the Purchase Requisition (PR) by pressing the button „Create RFX“ in PR record detail view. Note: Line items are not copied from PR to RFX and they need to be added to the RFX description or a product specification file needs to be uploaded.

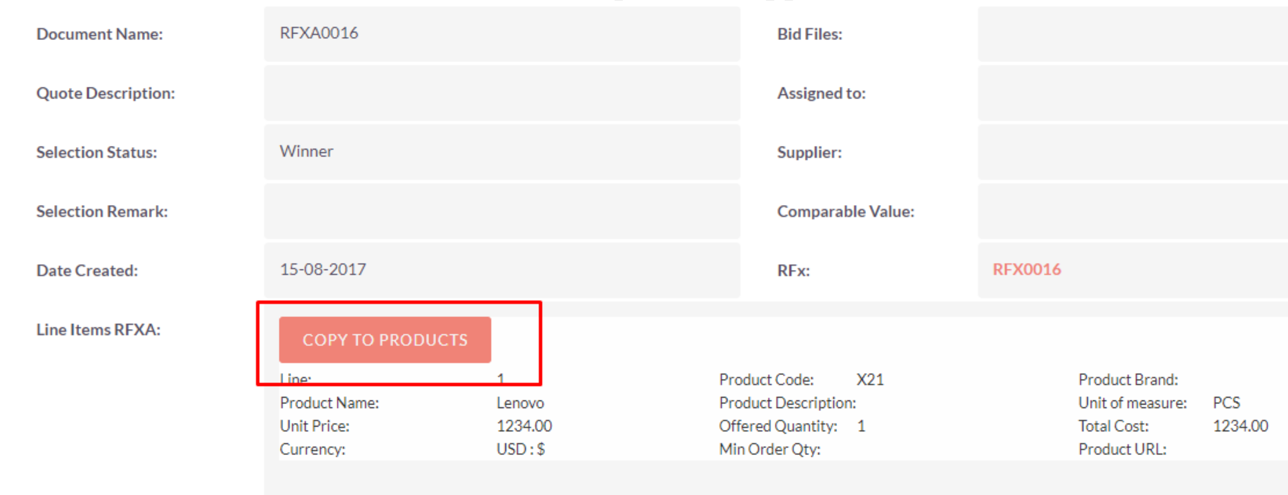
With RFX action button „Invite Suppliers“ it is possible to send tender invitations to suppliers. The invitation email will include a public URL for suppliers to submit their quotes. The submitted quotes will be automaticly saved as RFX answer records for the RFX.

RFX answers can then be evaluated and new products can be copied to product cantalog.

Action Buttons:
Invite Suppliers – send tender invitation emails to suppliers that are added to the section „Suppliers“
Create PDF – produces PDF file of the RFX record using the RFX Type PDF template.



Products from the RFX answer can be copied to Supplier Products.

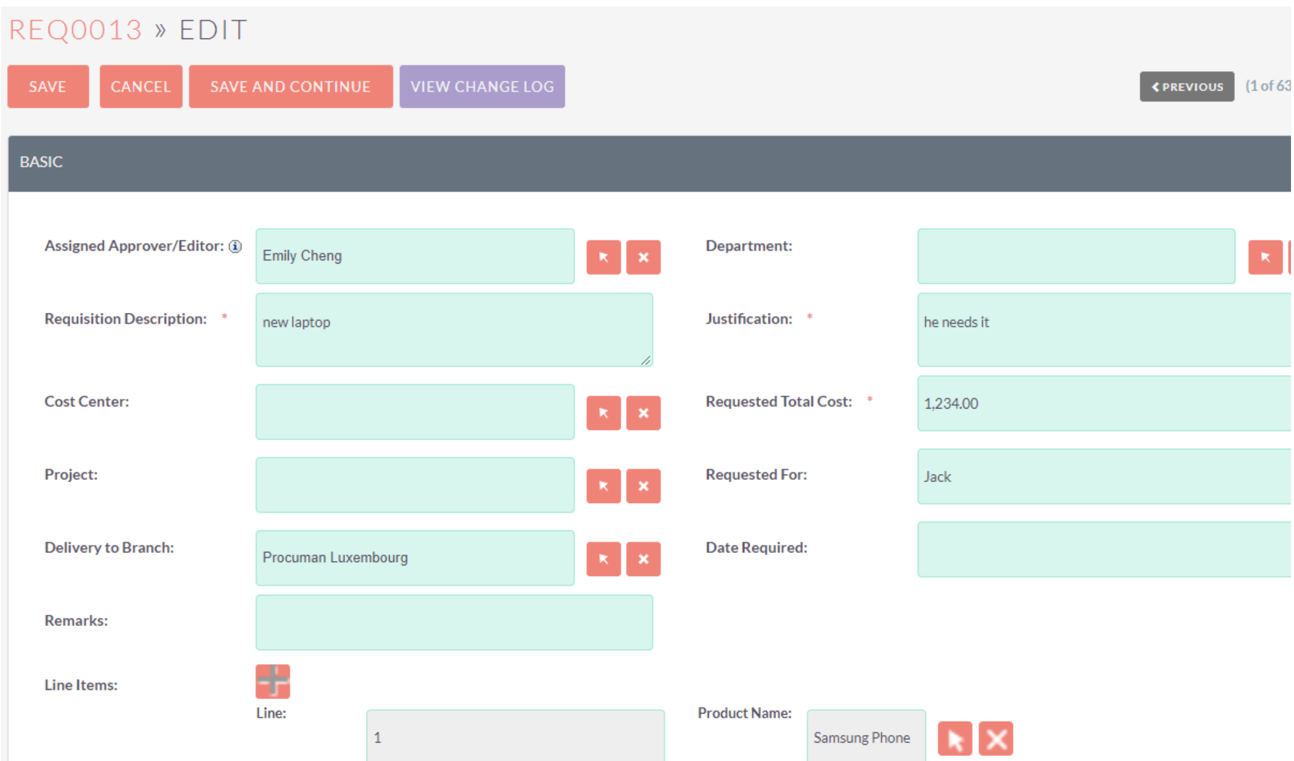


Purchase Requisition

Purchase Requests can be created by end users that require their requisition to go through an approval process. The requisition is first sent to the first level approving manager. Requesting user needs to select the approving manager for the "Sent for Approval"-field. Email will be automatically sent to the Approving Manager. She/he will then create approval record in the "Approvals"-section in the "Purchase Requests"-module's record details view. Request can then be further sent to "Next Level Approver" by the first level approving manager. After final approval email is sent to Purchasing Agent who creates the Purchase Order. Organisational hierarchy (next level manager is default value for Request Approver) and approval limits for approving manager are automaticly used by the approval process.

In detail view the „Create PO" action button allows to create new Purchase Order directly out of the purchase requisition record detail page.
(see also Purchase Request Approval Process User Guide document)

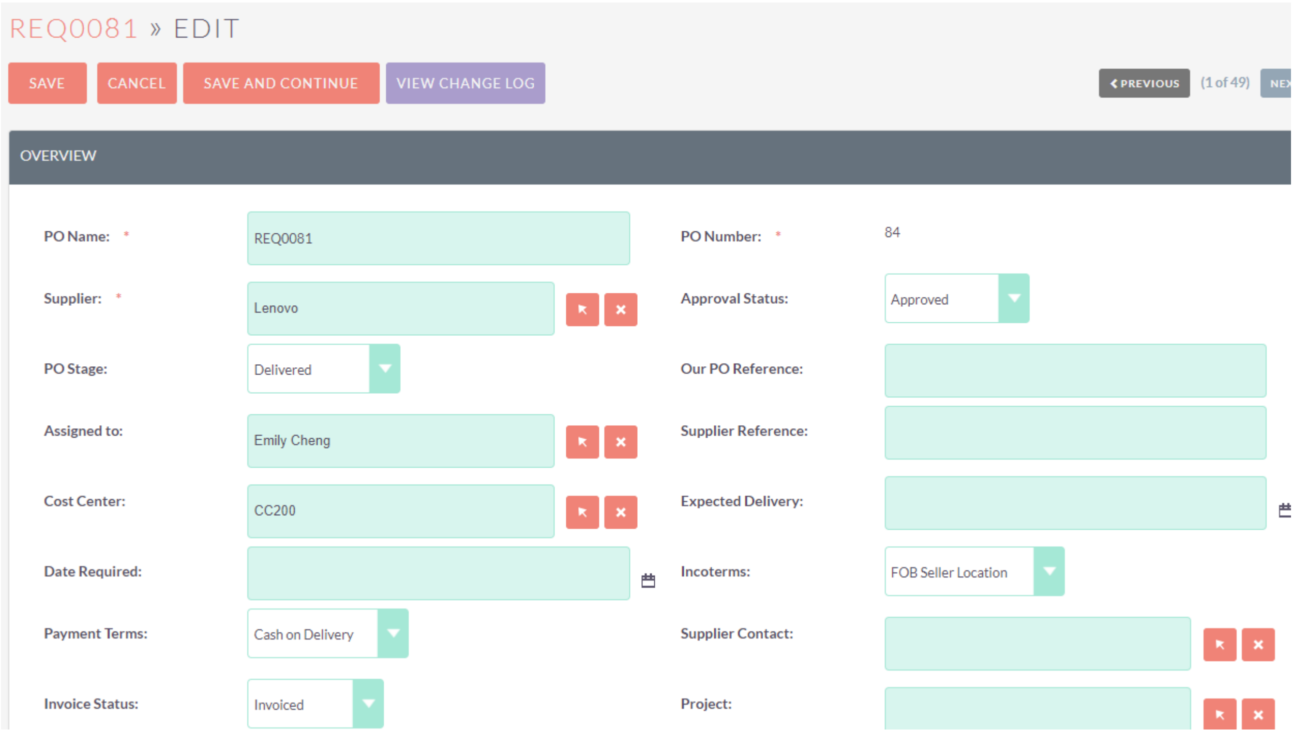
In detail view the „Create RFX" button will create a new Request for Quotation (RFQ) record. This can be used if the product is not already in the Suppliers product list and needs to be purchased from a new vendor. Note that the Requisition line items will not be copied to the new RFQ record.



Purchase Orders

Purchasing Agent creates new product and services orders at the Purchase Orders-module by pressing the „Create PO“ button.

Purchase Orders can also be created directly from the „Purchase Requisitions“ module by pressing the button „Create PO“ in the request record detailed view. Note that Purchase Requisition can contain products from different suppliers and that some of the Line Items may need to be changed or deleted after creating the PO out of the Requisition record. Also pay attention to the currency as it may differ between the Requisition and PO‘s default currency.



Header fields:

Mandatory fields are marked as „*“.

PO Name: Enter a descriptive name for the PO that helps toidentify the record

Supplier: Each PO is usually sent to a single supplier. The selected supplier information will be used when generating the PO PDF file.

PO Status: Used in reporting to report the PO statuses

Assigned To: Purchase Agent can identify his own records in lists by assigning the PO for himself.

Cost Center: Cost Center code for allocating the cost of the purchases

Date Required: Included in the PO PDF file

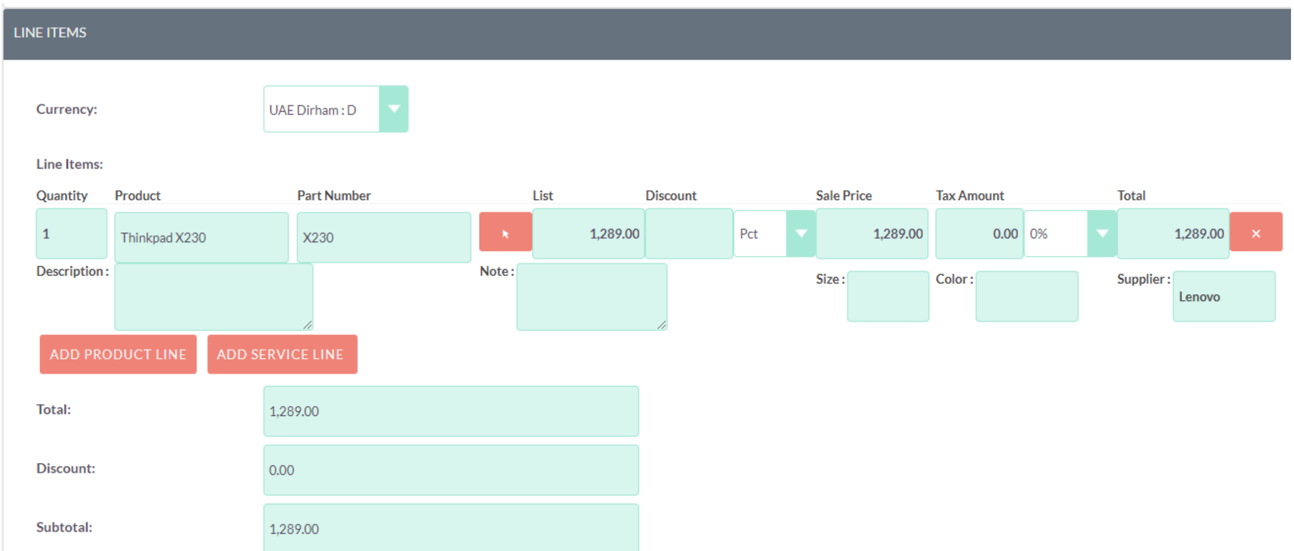
Delivery to Branch: Select the delivery destination

PO Number: Automatic PO numbering
Expected Delivery: Date for required delivery, included in PO PDF file
Contact: Supplier contact person for this PO
Project: If PO is related to a specific project, it can be selected here.
Required Documents: Information to the supplier, included in PO PDF file.

Maintenance of pulldown values (admin module is visible for System Administrator only):
Payment terms and all status fields pulldown values are maintained in Administration module, See Admin → Studio → Select Module Purchase Orders → Fields → Select field → Drop Down List Edit. Cost Centers, Departments and Branches are maintained under the Master Data menu.

Line Item Fields:
Currency: Select the purchasing currency. Price values are automaticly changed based on the exchange rates entered in the administration module.
Part Number: A Product lookup popup window can be used to select the products
NOTE ! Only products from Suppliers that have valid „trade licence expiry date“ are visible in the lookup window.
Tax % amount: Available Tax % values pulldown values are maintained in the Admin-module

„Add Service Line“-button allows to add a descriptive text of the purchased service.



PO PDF:
Purchase Orders can be emailed or saved and printed as PDF documents. PDF

document content template is maintained at “PDF Templates” module.

PO Stage status is automaticly updated when goods are received. The Invoice Status field is automaticly updated when Invoice is received.

Invoices Received

Vendors’ invoices can be registered in the “Invoices Received” module. Each invoice can contain several Purchase Orders. Write access for users with “Purchasing Agent”-role. Paid VATs can be reported out of the “Invoices Received” module with the Areports-module.

TIP:

In Purchase Orders details view it is possible to press button „Receive Invoice“ to automaticly create a new Received Invoice record and link all received line items to the invoice.

Goods Receipt

When ordered goods arrive a receipt record can be created at “Goods Receipt”-module. The product inventory level is automaticly updated based on the number of items received.

TIP:

In Purchase Orders details view it is possible to press button „Receive Goods“ to automaticly create a new Received Goods records for all PO line items.

Contracts

Contracts signed with supplier can be uploaded as documents to the „Contracts“-

module. Products and prices can also be entered as line items. Contract header contains the contract validity dates and status information.

Claims

All issues and returns to suppliers can be recorded at the „Claims"-module.

Cost Center

Cost centers and budgets are maintained in "Cost Center"-module. Each cost center can have a budget for a defined period. Write access for users with "Approvers"-role. In the "Reports" module two reports can be used to track Spend and Budget.

Projects

Project information with task schedules are maintained in Projects module. Also budgets can be entered for projects.

Departments

Departments used in list of values pulldowns are entered in Departments Master Data module.

GL Accounts

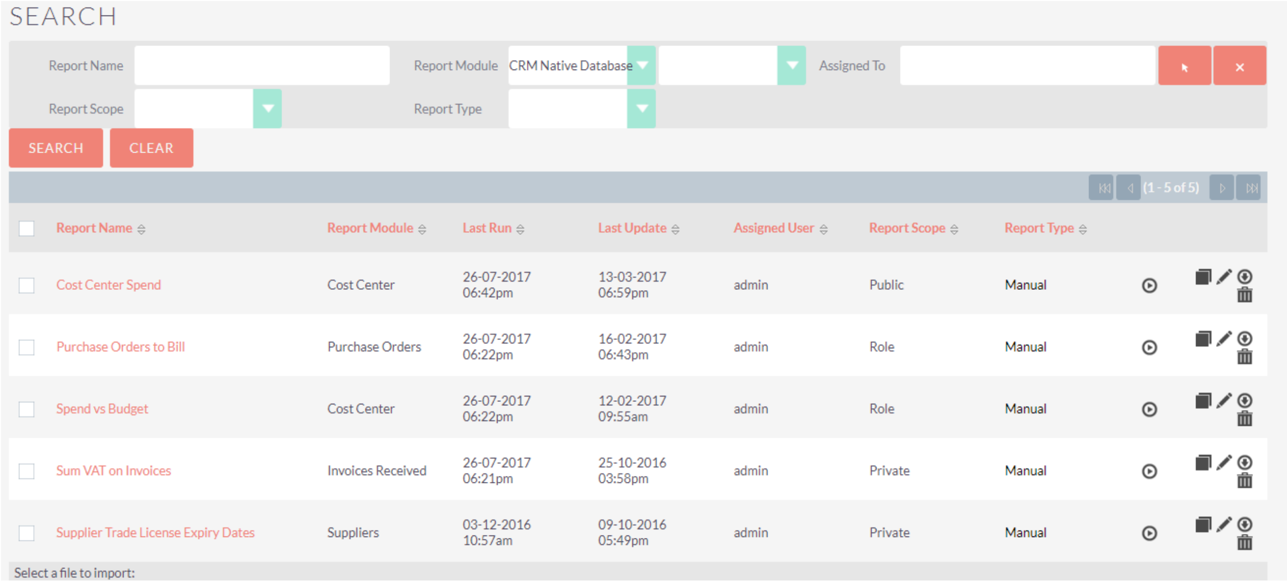
A default set of General Ledger Accounts are available in GL Accounts Master Data module.

Branches

Company locations with different ship-to and bill-to addresses. Used in PDF and email templates

Reporting

Three different reporting modules are made available, Kreports, Areports and SuiteReports. Kreports allow custom fields calculations. AReports allow summary line feature for Total Sum calculations and report can be assigned to a user role. SuiteReports allow reports to be assigned to a user group.


SEARCH
Report Name
Report Module
CRM Native Database
Assigned To
Report Scope
Report Type
SEARCH
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(1 - 5 of 5)
Report Name
Report Module
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Last Update
Assigned User
Report Scope
Report Type
Cost Center Spend
Cost Center
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Manual
Purchase Orders to Bill
Purchase Orders
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Spend vs Budget
Cost Center
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12-02-2017 09:55am
admin
Role
Manual
Sum VAT on Invoices
Invoices Received
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Supplier Trade License Expiry Dates
Suppliers
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Select a file to import: