

User Guide

v.2.0

1. Procuman Software

Procuman Software is based on open source EspoCRM no-code platform and it has been configured to support wide range of procurement management processes. EspoCRM 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.

Translations are provided by the Chrome browser:

1. On your computer, open Chrome.
2. Logon to your Procuman instance.
3. Click on the three dots on the right of the Chrome menu bar, select Translate.
4. Select your preferred language on the popup field on the right.
5. Chrome will translate the Procuman webapp for you from english to your preferred language.

2. Modules Overview

Supplier Portal:

Supplier management portal is seamlessly integrated with Procuman e-procurement and it allows suppliers to register, maintain their contact information, submit quotations and documents. Suppliers can register at Supplier Portal registration page (see Supplier Portal User Guide document).

“Requisitions” menu:

Module to submit and approve purchase requisition for end users and approving managers.

“Purchasing” menu:

All purchasing data. It includes “Purchase Orders”, “Goods Receipts”, “Invoices Received”, “Inventory” modules.

Purchase Orders:

Module where Purchase Orders are created, maintained and send to suppliers.

Goods Receipts:

Module allows to acknowledge the receipt of goods and linking the GR with Purchase Orders.

Invoices Received:

Contains records for received invoices and tracking for payment status and goods receipts.

Inventory:

Contains the on-hand quantity of products at the warehouses and allows pick, add and transfer of goods.

“Suppliers” menu:

All supplier data including all contact records and products. It includes “Suppliers”, “Products”, “Portal Contacts”, and “Suppliers Registrations”.

“Tenders” menu:

RFX Requests:

Create and maintain tenders that are open for bidding by the suppliers and visible in supplier portal.

RFQ BIDs:

All bids that have been submitted by suppliers to RFXs in Supplier Portal.

Supplier Questions:

During RFX, supplier may ask questions and these are managed at Supplier Questions module.

“Master data” menu:

Includes modules for “Reports”, “Branches”, “Cost Centers”, “GL Accounts”, “Product Category”, “Projects” and “Budgets”.

System Setup (Administration-module):

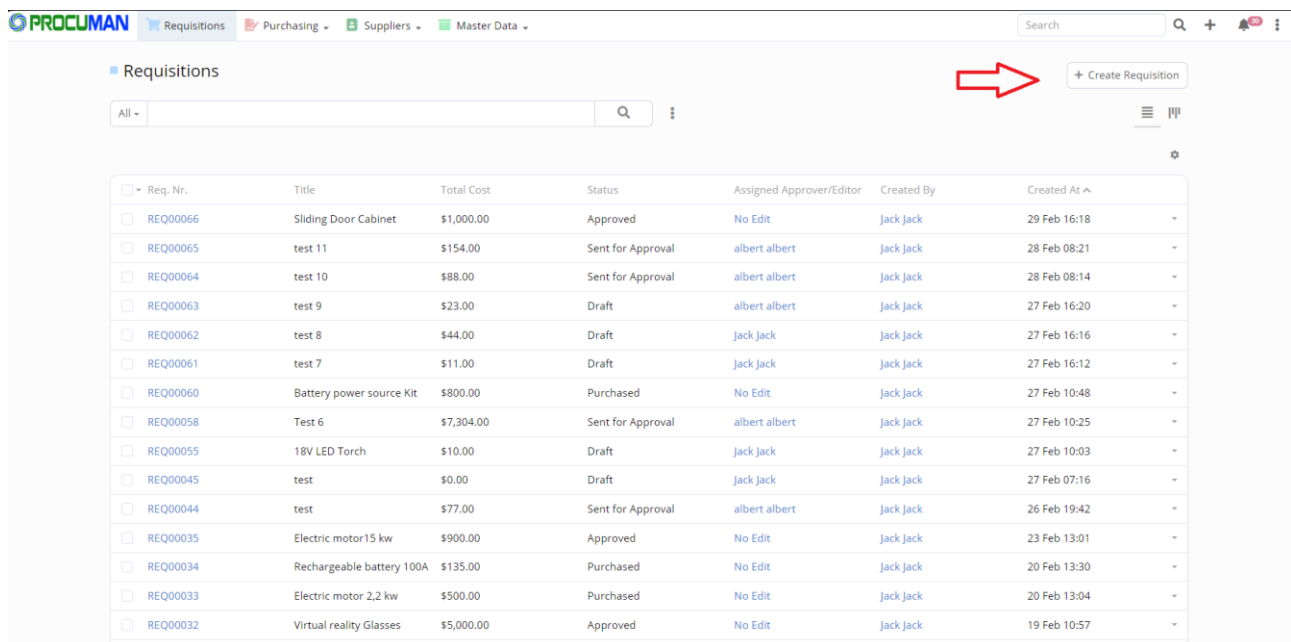
Before starting to use a new system, following system configurations are needed:

1. Enter the company default currency and exchange rates for other purchasing currencies against your company default currency: Administration → Currency.
2. Upload your company logo: Administration → User Interface.

3. Update the Branches module for company's delivery locations and bill-to addresses: Master Data → Branches.
4. Create new users and user groups. Assign each user to a group and to a role: Administration → Users.

3. Purchase Requisition Process

Purchase Requests can be created by end users who require their requisition to go through an approval process (“Requisitions” menu).



The screenshot shows the Procuman web application interface. At the top, there is a navigation bar with the Procuman logo and several menu items: Requisitions, Purchasing, Suppliers, and Master Data. A search bar is located on the right side of the navigation bar. Below the navigation bar, the main content area is titled 'Requisitions'. On the right side of this area, there is a button labeled '+ Create Requisition' with a red arrow pointing to it. Below the button, there is a table with the following columns: Req. Nr., Title, Total Cost, Status, Assigned Approver/Editor, Created By, and Created At. The table contains 15 rows of data, each representing a requisition. The first row is highlighted in blue.

Req. Nr.	Title	Total Cost	Status	Assigned Approver/Editor	Created By	Created At
REQ00066	Sliding Door Cabinet	\$1,000.00	Approved	No Edit	Jack Jack	29 Feb 16:18
REQ00065	test 11	\$154.00	Sent for Approval	albert albert	Jack Jack	28 Feb 08:21
REQ00064	test 10	\$88.00	Sent for Approval	albert albert	Jack Jack	28 Feb 08:14
REQ00063	test 9	\$23.00	Draft	albert albert	Jack Jack	27 Feb 16:20
REQ00062	test 8	\$44.00	Draft	Jack Jack	Jack Jack	27 Feb 16:16
REQ00061	test 7	\$11.00	Draft	Jack Jack	Jack Jack	27 Feb 16:12
REQ00060	Battery power source Kit	\$800.00	Purchased	No Edit	Jack Jack	27 Feb 10:48
REQ00058	Test 6	\$7,304.00	Sent for Approval	albert albert	Jack Jack	27 Feb 10:25
REQ00055	18V LED Torch	\$10.00	Draft	Jack Jack	Jack Jack	27 Feb 10:03
REQ00045	test	\$0.00	Draft	Jack Jack	Jack Jack	27 Feb 07:16
REQ00044	test	\$77.00	Sent for Approval	albert albert	Jack Jack	26 Feb 19:42
REQ00035	Electric motor15 kw	\$900.00	Approved	No Edit	Jack Jack	23 Feb 13:01
REQ00034	Rechargeable battery 100A	\$135.00	Purchased	No Edit	Jack Jack	20 Feb 13:30
REQ00033	Electric motor 2,2 kw	\$500.00	Purchased	No Edit	Jack Jack	20 Feb 13:04
REQ00032	Virtual reality Glasses	\$5,000.00	Approved	No Edit	Jack Jack	19 Feb 10:57

Requestor user needs to select the approving manager for the “Assigned Approver/Editor”-field, create “Title”, “Required Date”, etc., and add “Requisition Lines”. Mandatory fields are marked as “ * “.

Requisitions > create

Save Cancel ***

Requisition Header

Req. Nr. - Status New

Assigned Approver/Editor Select Branch Select

Title * Request Description Sourcing URL Type & press enter

Required Date Project Select Cost Center Select

Attachments Total Cost -

Requisition Lines *

+ No Data

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Requestor adds “Product Name” by selecting product from the database or creating a new one in the “Requisitions Lines”.

Requisitions > create

Save Cancel ***

Requisition Header

Req. Nr. - Status New

Assigned Approver/Editor Select Branch Select

Title * Request Description Sourcing URL Type & press enter

Required Date Project Select Cost Center Select

Attachments Total Cost -

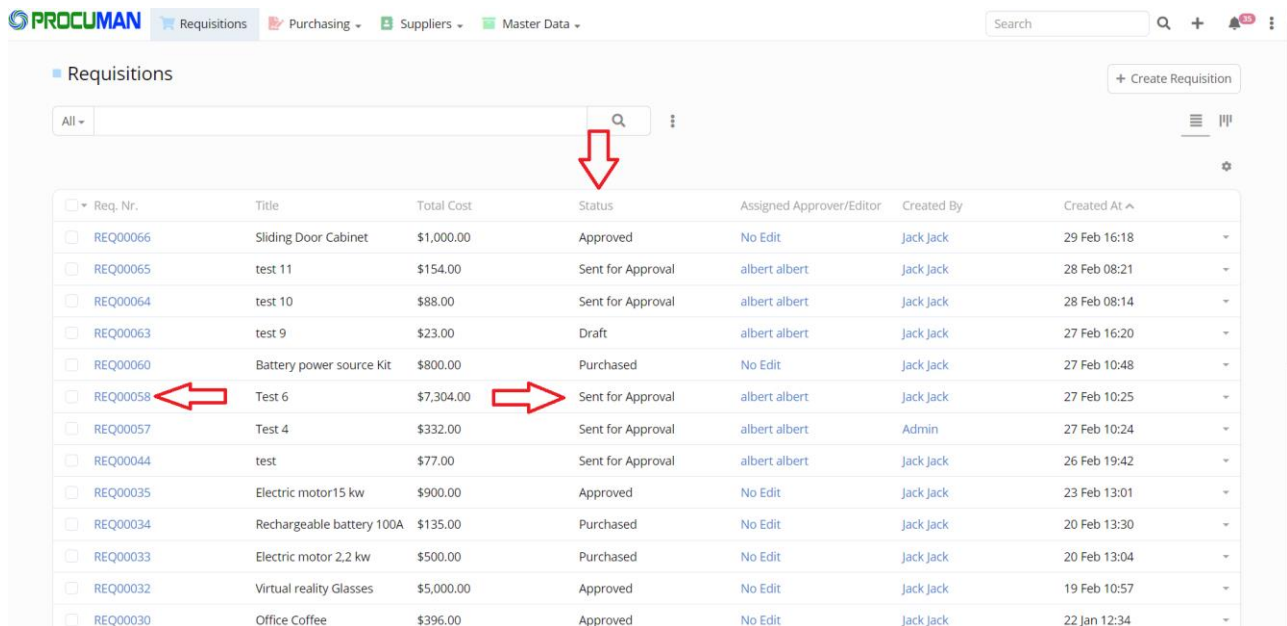
Requisition Lines *

Products	Product Name	Quantity	Price	Total	UOM	GL Account	Description
Select				USD -	Pieces	Select	

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Approvals:

Approving Manager sees the his pending approval requests in the “Requisitions”-list with status “Sent for Approval”.



Req. Nr.	Title	Total Cost	Status	Assigned Approver/Editor	Created By	Created At
REQ00066	Sliding Door Cabinet	\$1,000.00	Approved	No Edit	Jack Jack	29 Feb 16:18
REQ00065	test 11	\$154.00	Sent for Approval	albert albert	Jack Jack	28 Feb 08:21
REQ00064	test 10	\$88.00	Sent for Approval	albert albert	Jack Jack	28 Feb 08:14
REQ00063	test 9	\$23.00	Draft	albert albert	Jack Jack	27 Feb 16:20
REQ00060	Battery power source Kit	\$800.00	Purchased	No Edit	Jack Jack	27 Feb 10:48
REQ00058	Test 6	\$7,304.00	Sent for Approval	albert albert	Jack Jack	27 Feb 10:25
REQ00057	Test 4	\$332.00	Sent for Approval	albert albert	Admin	27 Feb 10:24
REQ00044	test	\$77.00	Sent for Approval	albert albert	Jack Jack	26 Feb 19:42
REQ00035	Electric motor15 kw	\$900.00	Approved	No Edit	Jack Jack	23 Feb 13:01
REQ00034	Rechargeable battery 100A	\$135.00	Purchased	No Edit	Jack Jack	20 Feb 13:30
REQ00033	Electric motor 2.2 kw	\$500.00	Purchased	No Edit	Jack Jack	20 Feb 13:04
REQ00032	Virtual reality Glasses	\$5,000.00	Approved	No Edit	Jack Jack	19 Feb 10:57
REQ00030	Office Coffee	\$396.00	Approved	No Edit	Jack Jack	22 Jan 12:34

Approving manager can approve a requisition by clicking the Req.Nr. link and creating approval record by pressing “+” icon in the “Approvals” subpanel and selecting the approval action from list. Options are:

- Approved - Final
 - This is final approval and requisition can no longer be updated thereafter. Final Approval is subject to approver’s approval limit that may block user from approving the requisition.
- Approved – Forward to Next Level
 - Approver may need to forward the requisition for final approval for a higher level manager
- Declined – To Revise
 - Requisition is declined and assigned back to the creator. Creator can revise the requisition and assign back to approval manager for approval

Assigned Approver/Editor: albert albert

Branch: Procuman Software

Title: Test 6

Request Description: None

Sourcing URL: None

Required Date: None

Project: None

Cost Center: 100

Attachments: None

Total Cost: \$7,304.00

Products	Product Name	Quantity	Price	Total	UOM	GL Account	Description
Lenovo Screen	Lenovo Screen	22,000	\$332.00	\$7,304.00	Pieces		

Approvals: No Data

Notes & Documents: No Data

Create Approval

Save Full Form Cancel

Status: Approved - Final

Approved - Final

Approved - Forwarded To Next Level

Declined - To Revise

Approving manager can control the budget spending before approval by checking the budget values in the Cost Center Budget Control Panel.

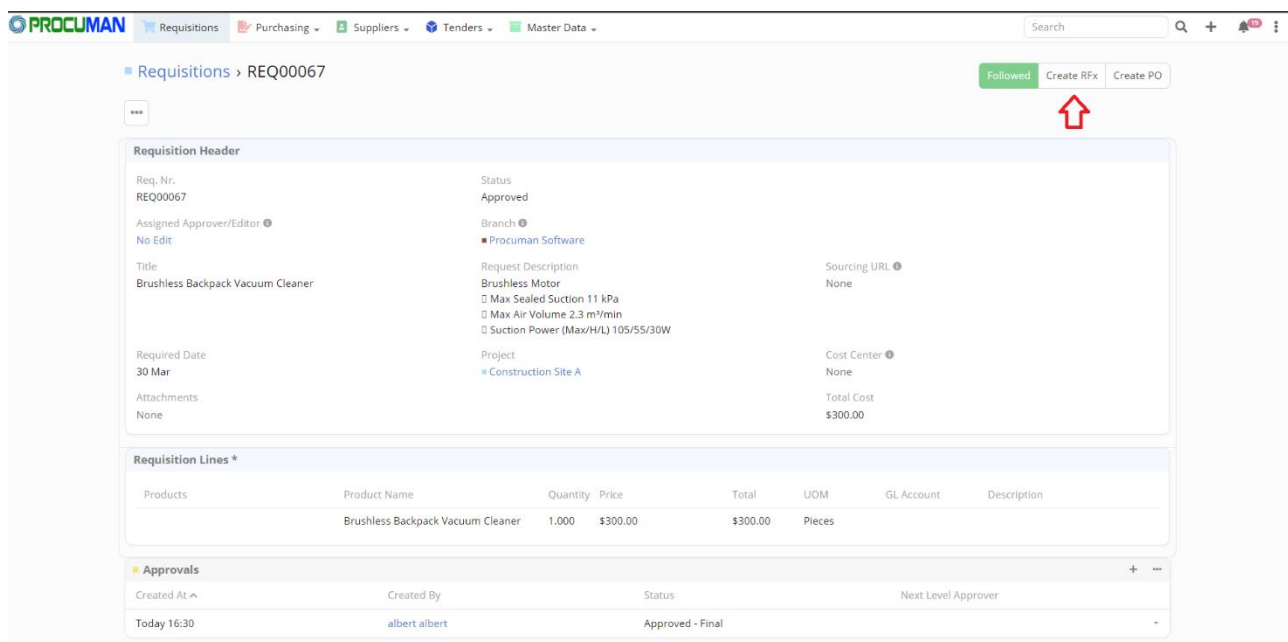
Cost Center Budget Control			
Period Budget	Period Spend	Remaining Budget	
10,000	3,638.00	6,362	

Approvals			
Created At	Created By	Status	Next L
02 May 08:33	Gordon Gordon	Approved - Final	

After requisition “Status” is changed to “Approved”, Purchase Agent can either “Create RFX” or “Create PO”.

E-Tendering

In Requisitions the “Create RFX” action button triggers the e-Tendering process by creating a new RFX record. Tenders can also be opened manually in “RFX Request” list view.



Procuman.com interface showing the Requisition form for REQ00067. The status is 'Approved'. The 'Create RFX' button is highlighted with a red arrow.

Requisition Header

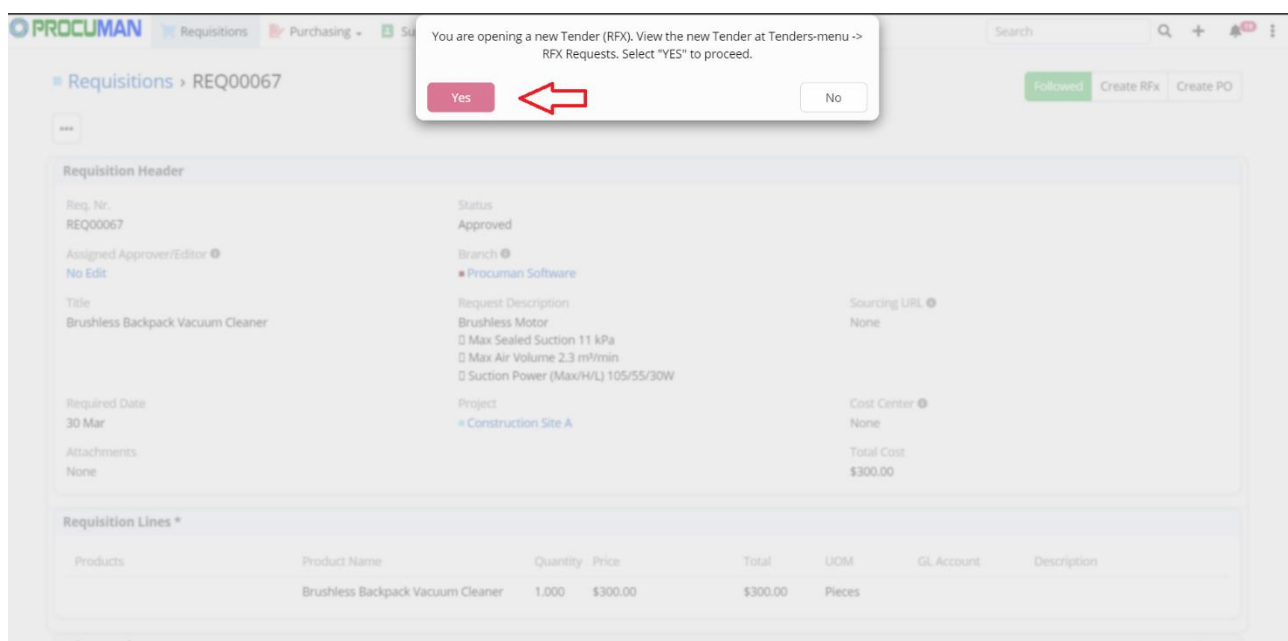
Req. Nr. REQ00067	Status Approved
Assigned Approver/Editor No Edit	Branch Procuman Software
Title Brushless Backpack Vacuum Cleaner	Request Description Brushless Motor Max Sealed Suction 11 kPa Max Air Volume 2.3 m³/min Suction Power (Max/H/L) 105/55/30W
Required Date 30 Mar	Project Construction Site A
Attachments None	Sourcing URL None
	Cost Center None
	Total Cost \$300.00

Requisition Lines *

Products	Product Name	Quantity	Price	Total	UOM	GL Account	Description
	Brushless Backpack Vacuum Cleaner	1,000	\$300.00	\$300.00	Pieces		

Approvals

Created At	Created By	Status	Next Level Approver
Today 16:30	albert albert	Approved - Final	



Procuman.com interface showing the Requisition form for REQ00067. A confirmation dialog box is displayed, asking: "You are opening a new Tender (RFX). View the new Tender at Tenders-menu -> RFX Requests. Select 'YES' to proceed." The 'Yes' button is highlighted with a red arrow.

Requisition Header

Req. Nr. REQ00067	Status Approved
Assigned Approver/Editor No Edit	Branch Procuman Software
Title Brushless Backpack Vacuum Cleaner	Request Description Brushless Motor Max Sealed Suction 11 kPa Max Air Volume 2.3 m³/min Suction Power (Max/H/L) 105/55/30W
Required Date 30 Mar	Project Construction Site A
Attachments None	Sourcing URL None
	Cost Center None
	Total Cost \$300.00

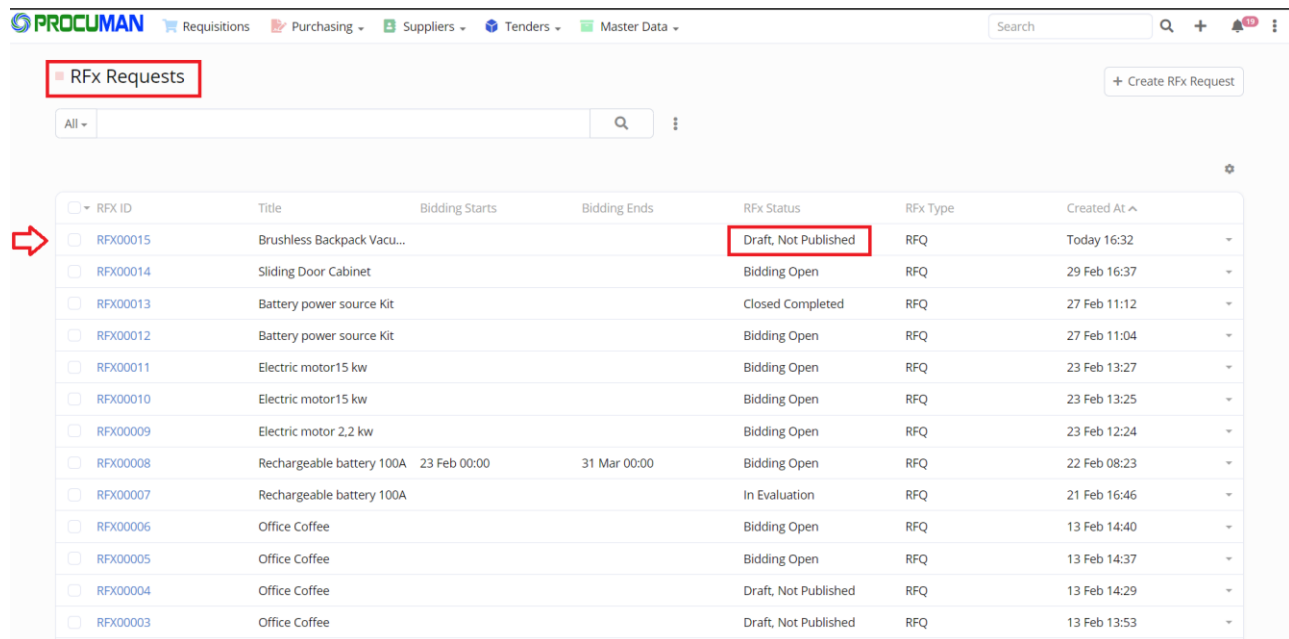
Requisition Lines *

Products	Product Name	Quantity	Price	Total	UOM	GL Account	Description
	Brushless Backpack Vacuum Cleaner	1,000	\$300.00	\$300.00	Pieces		

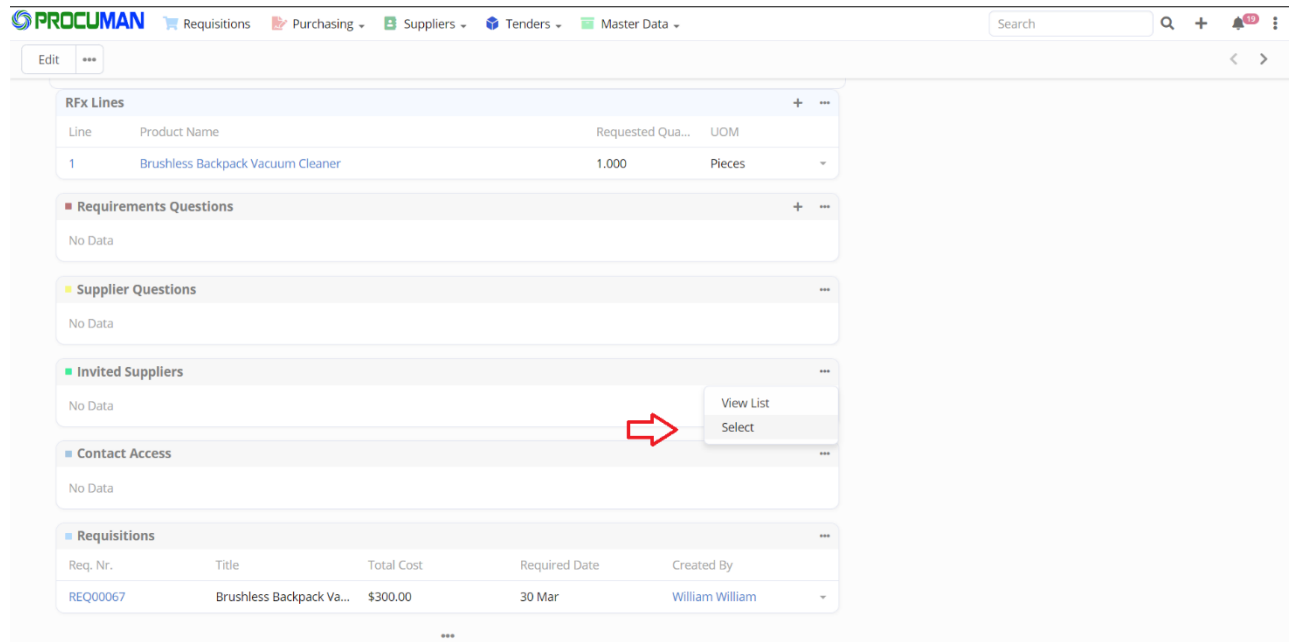
Approvals

Created At	Created By	Status	Next Level Approver
Today 16:30	albert albert	Approved - Final	

Afterwards Purchase Agent can visit the “RFx Requests”-submenu, edit the newly created request and invite the Suppliers in the “Invited Suppliers” subpanel. Note that RFX can only be edited when it’s status is “Draft, Not Published”.



RFX ID	Title	Bidding Starts	Bidding Ends	RFX Status	RFX Type	Created At
RF000015	Brushless Backpack Vacu...			Draft, Not Published	RFQ	Today 16:32
RF000014	Sliding Door Cabinet			Bidding Open	RFQ	29 Feb 16:37
RF000013	Battery power source Kit			Closed Completed	RFQ	27 Feb 11:12
RF000012	Battery power source Kit			Bidding Open	RFQ	27 Feb 11:04
RF000011	Electric motor15 kw			Bidding Open	RFQ	23 Feb 13:27
RF000010	Electric motor15 kw			Bidding Open	RFQ	23 Feb 13:25
RF000009	Electric motor 2.2 kw			Bidding Open	RFQ	23 Feb 12:24
RF000008	Rechargeable battery 100A	23 Feb 00:00	31 Mar 00:00	Bidding Open	RFQ	22 Feb 08:23
RF000007	Rechargeable battery 100A			In Evaluation	RFQ	21 Feb 16:46
RF000006	Office Coffee			Bidding Open	RFQ	13 Feb 14:40
RF000005	Office Coffee			Bidding Open	RFQ	13 Feb 14:37
RF000004	Office Coffee			Draft, Not Published	RFQ	13 Feb 14:29
RF000003	Office Coffee			Draft, Not Published	RFQ	13 Feb 13:53



Edit ***

RFX Lines + ***

Line	Product Name	Requested Qua...	UOM
1	Brushless Backpack Vacuum Cleaner	1.000	Pieces

Requirements Questions + ***

No Data

Supplier Questions ***

No Data

Invited Suppliers ***

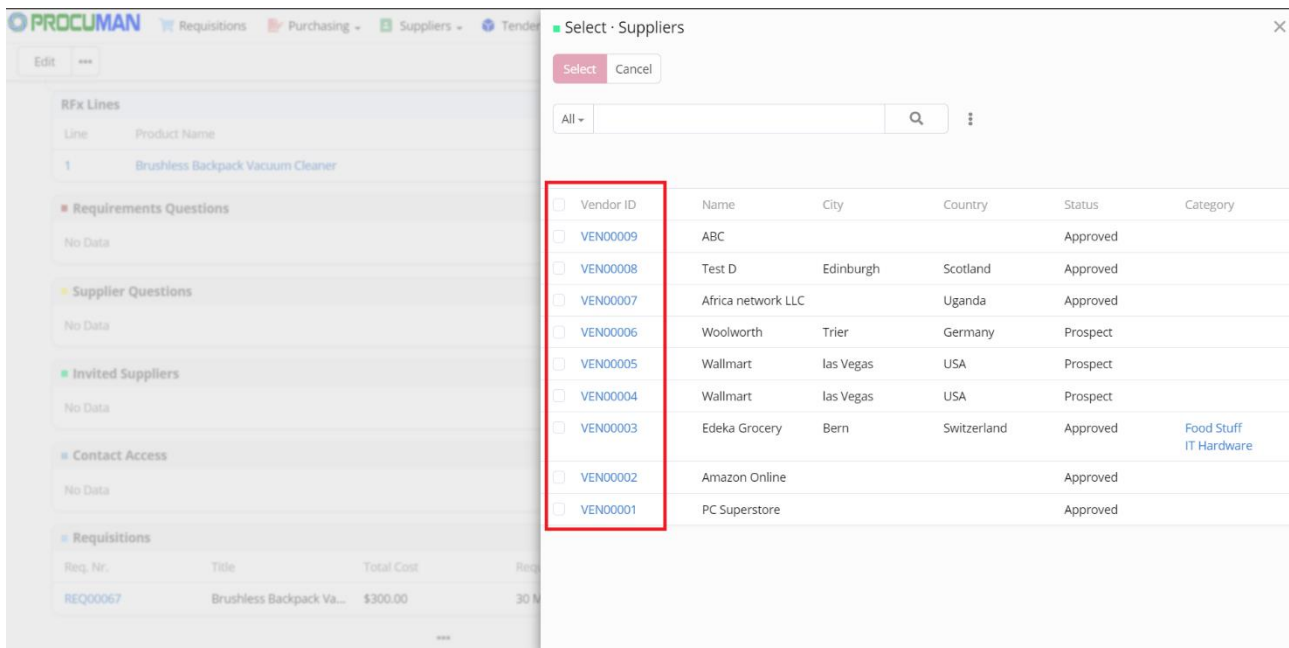
No Data

Contact Access ***

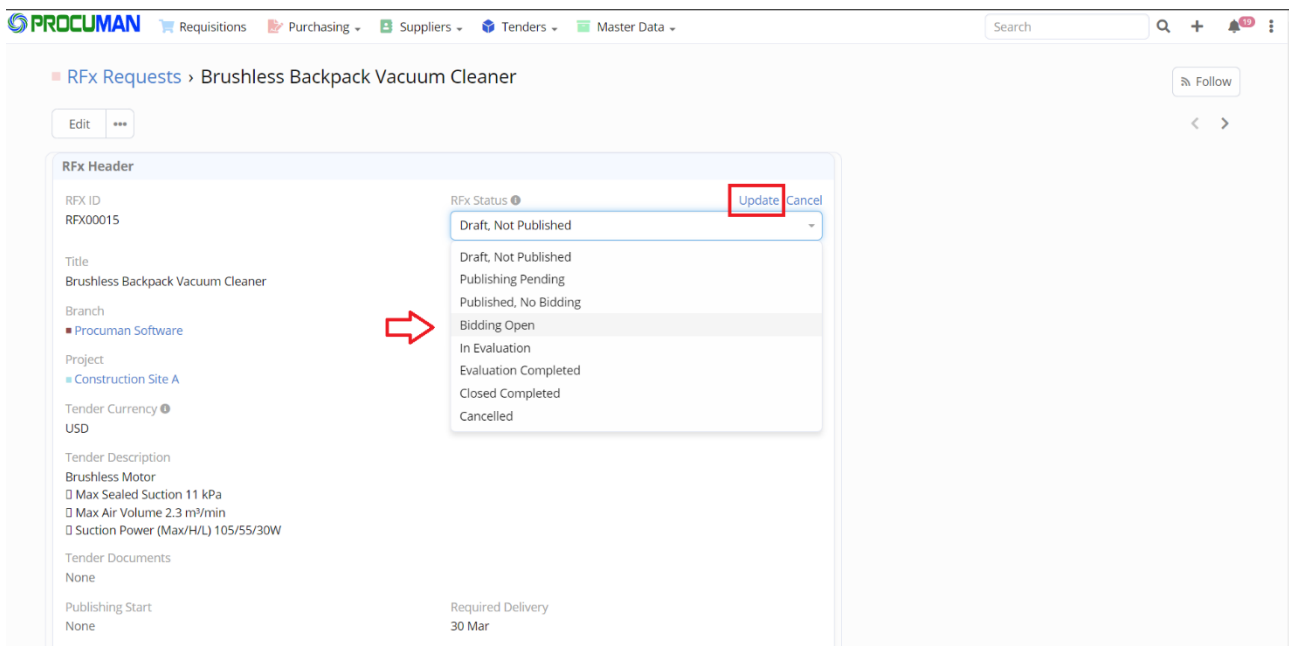
No Data

Requisitions ***

Req. Nr.	Title	Total Cost	Required Date	Created By
REQ00067	Brushless Backpack Va...	\$300.00	30 Mar	William William



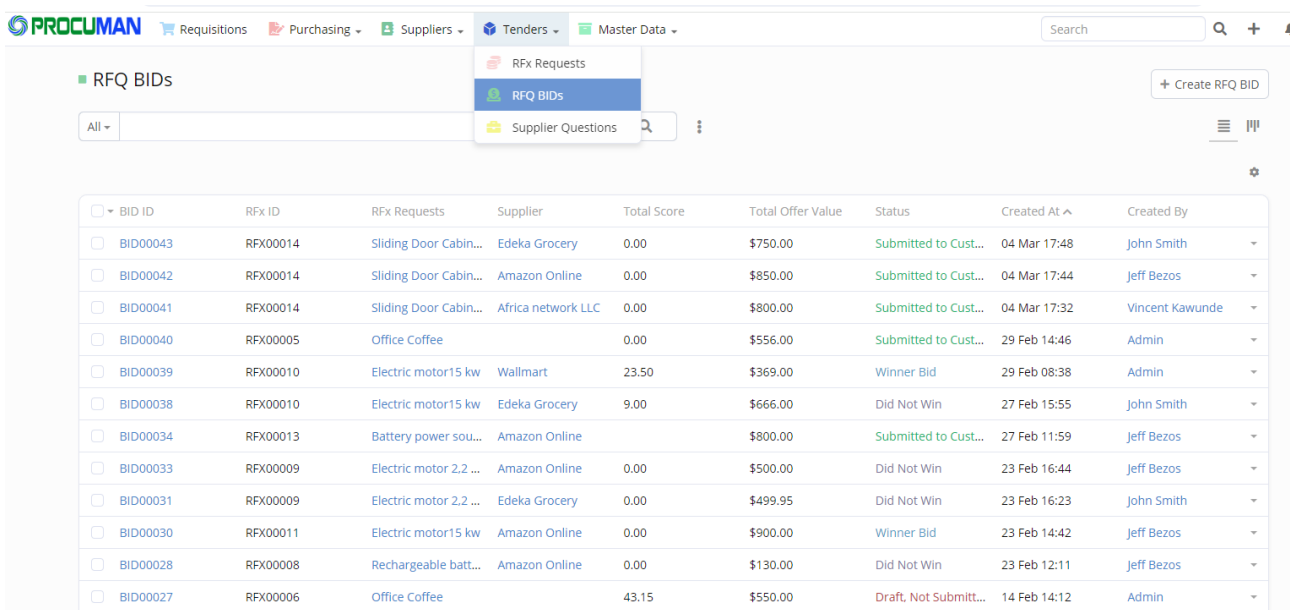
The tender can be published manually by selecting the “Published, No Bidding” status. Invited Suppliers will now see the tender in Supplier Portal but bids cannot be submitted yet. A scheduled workflow will automatically publish the tender when the “Publishing Start” date is reached. Tender status will be set as “Bidding Open” when the “Bidding Starts” date is reached and status will be set as “In Evaluation” when Bidding End date is reached.



Bid Evaluation

New bids can be viewed in the RFQ BIDS module under the Tenders-menu. Vendor Bids can be

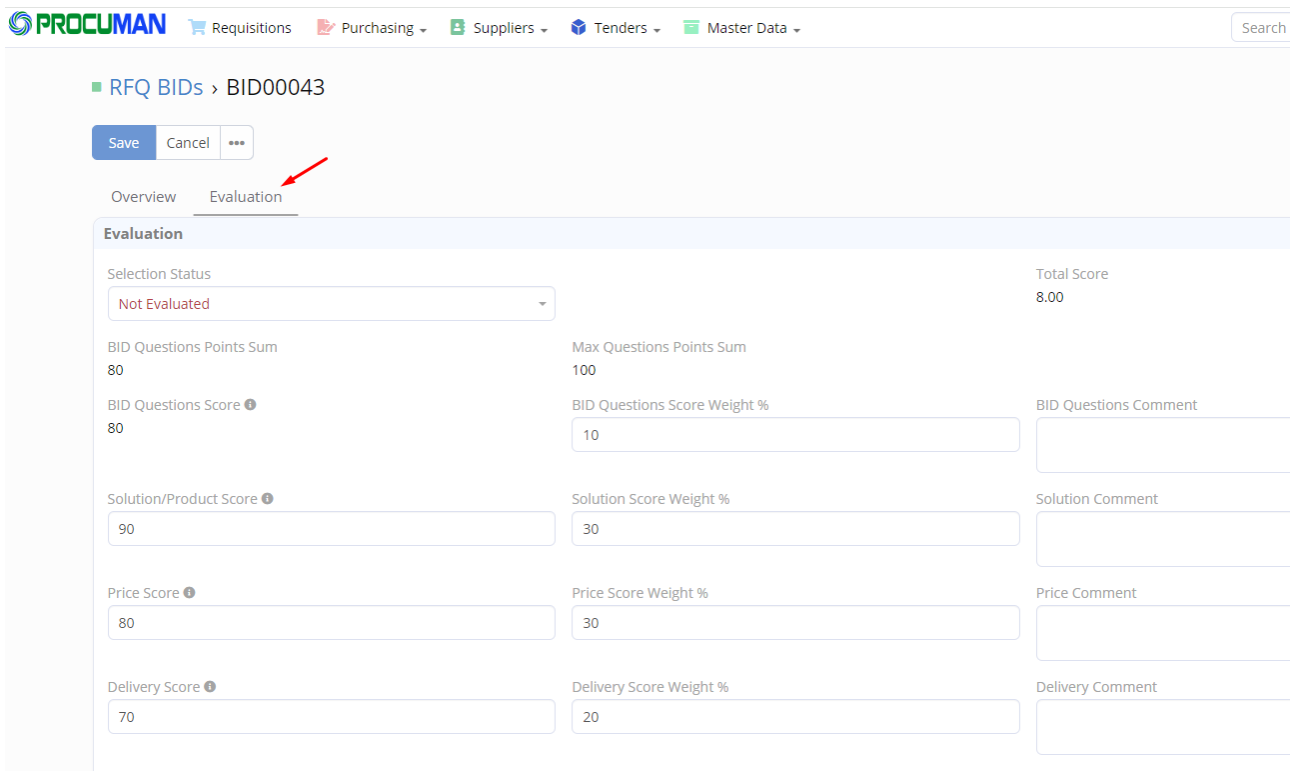
filtered for the particular RFX ID that is being evaluated.



BID ID	RFX ID	RFX Requests	Supplier	Total Score	Total Offer Value	Status	Created At	Created By
BID00043	RFX00014	Sliding Door Cabin...	Edeka Grocery	0.00	\$750.00	Submitted to Cust...	04 Mar 17:48	John Smith
BID00042	RFX00014	Sliding Door Cabin...	Amazon Online	0.00	\$850.00	Submitted to Cust...	04 Mar 17:44	Jeff Bezos
BID00041	RFX00014	Sliding Door Cabin...	Africa network LLC	0.00	\$800.00	Submitted to Cust...	04 Mar 17:32	Vincent Kawunde
BID00040	RFX00005	Office Coffee		0.00	\$556.00	Submitted to Cust...	29 Feb 14:46	Admin
BID00039	RFX00010	Electric motor15 kw	Walmart	23.50	\$369.00	Winner Bid	29 Feb 08:38	Admin
BID00038	RFX00010	Electric motor15 kw	Edeka Grocery	9.00	\$666.00	Did Not Win	27 Feb 15:55	John Smith
BID00034	RFX00013	Battery power sou...	Amazon Online		\$800.00	Submitted to Cust...	27 Feb 11:59	Jeff Bezos
BID00033	RFX00009	Electric motor 2.2 ...	Amazon Online	0.00	\$500.00	Did Not Win	23 Feb 16:44	Jeff Bezos
BID00031	RFX00009	Electric motor 2.2 ...	Edeka Grocery	0.00	\$499.95	Did Not Win	23 Feb 16:23	John Smith
BID00030	RFX00011	Electric motor15 kw	Amazon Online	0.00	\$900.00	Winner Bid	23 Feb 14:42	Jeff Bezos
BID00028	RFX00008	Rechargeable batt...	Amazon Online	0.00	\$130.00	Did Not Win	23 Feb 12:11	Jeff Bezos
BID00027	RFX00006	Office Coffee		43.15	\$550.00	Draft, Not Submitt...	14 Feb 14:12	Admin

BID scoring is done under the “Evaluation” tab in the BID details view. Total score is calculated based on the individual scores and their weight %. The sum of all weight % should be 100.

BID Questions are evaluated at the subpanel “Requirements Q&A” and their total average score is saved in field “BID Questions Score”. The winner bid is defined by selecting a value from the drop-down list “Selection Status”.



RFQ Bids > BID00043

Save Cancel ...

Overview **Evaluation**

Evaluation

Selection Status: Not Evaluated (dropdown) Total Score: 8.00

BID Questions Points Sum: 80 Max Questions Points Sum: 100

BID Questions Score: 80 BID Questions Score Weight %: 10 BID Questions Comment:

Solution/Product Score: 90 Solution Score Weight %: 30 Solution Comment:

Price Score: 80 Price Score Weight %: 30 Price Comment:

Delivery Score: 70 Delivery Score Weight %: 20 Delivery Comment:

Purchase order for the winner supplier and bid can be created by pressing the “Create

PO” button in bid detail view.

The screenshot shows the Procuman web application interface. At the top, there's a navigation bar with 'Requisitions', 'Purchasing', and a search bar. Below the navigation bar, the breadcrumb 'RFQ BIDs > BID00043' is visible. To the right of the breadcrumb, there are two buttons: 'Follow' and 'Create PO'. The 'Create PO' button is highlighted with a red rectangular box. Below the breadcrumb, there are 'Save' and 'Cancel' buttons. The main content area is titled 'Overview' and 'Evaluation'. Under 'Overview', there's a 'BID Header' section with a table of bid details.

BID Header		
BID ID	Submit Action ⓘ	Status
BID00043	Submit to Customer	Under Evaluation
Supplier	Supplier Reference	RFx Requests
Edeka Grocery	Sliding door	Sliding Door Cabinet
Offer Valid Until	Payment Terms	Description
11 May	EXW	None
Total Offer Value	Bid Currency	Created By
\$750.00	USD	John Smith
Bid Documents	Created At	
None	04 Mar 17:48	

4. Purchase Order Process

“Create PO” action button allows to create new Purchase Order directly out of the purchase requisition record.

The screenshot shows the Procuman web application interface for a requisition record. At the top, there's a navigation bar with 'Requisitions', 'Purchasing', 'Suppliers', 'Tenders', and 'Master Data'. Below the navigation bar, the breadcrumb 'Requisitions > REQ00066' is visible. To the right of the breadcrumb, there are two buttons: 'Create RFx' and 'Create PO'. A red arrow points to the 'Create PO' button. Below the breadcrumb, there are three dots. The main content area is titled 'Requisition Header' and contains a table of requisition details.

Requisition Header		
Req. Nr.	Status	
REQ00066	Purchased	
Assigned Approver/Editor ⓘ	Branch ⓘ	
No Edit	Procuman Software	
Title	Request Description	Sourcing URL ⓘ
Sliding Door Cabinet	Sliding Door Cabinet, ideal for robust and secure storage in various professional environments such as workshops, offices, and warehouses. This cabinet is versatile with adjustable features for organizing a wide range of items.	None
Required Date	Project	Cost Center ⓘ
09 Mar	Construction Site A	100
Attachments		Total Cost
None		\$1,000.00

Below the requisition header, there's a section titled 'Requisition Lines *' which contains a table of requisition lines.

Products	Product Name	Quantity	Price	Total	UOM	GL Account	Description
	Sliding Door Cabinet	1,000	\$1,000.00	\$1,000.00	Pieces		Specifically: □ External Dimensions: (W x D x H) 1,000 x 500 x 1,500 mm

System will automatically add the PO Number in the “Purchase Orders” subpanel and flags the PO Status as “Draft”.

The screenshot shows the Procuman interface with the 'Purchase Orders' subpanel selected. The 'Purchase Orders' tab is highlighted with a red arrow. The table below shows a single entry with PO Number PO000040, Title Sliding Door Cabinet, PO Status Draft, and Supplier. A red arrow points to the 'Draft' status.

PO Number	Title	PO Status	Supplier
PO000040	Sliding Door Cabinet	Draft	

After PO is created you can access the PO under Purchasing -> Purchase Orders menu item.

The screenshot shows the Procuman interface with the 'Purchase Orders' menu item under the 'Purchasing' tab highlighted with a red arrow. The table below shows a list of purchase orders with columns: PO Number, Supplier, Title, PO Status, Financial Status, Grand Total, Created By, and Created At.

PO Number	Supplier	Title	PO Status	Financial Status	Grand Total	Created By	Created At
PO000040		Sliding Door Cabinet	Draft	No Commitment	\$0.00	William William	Today 14:54
PO000039	Edeka Grocery	Electric motor 2.2 kw	Draft	No Commitment	\$499.95	Admin	29 Feb 15:27
PO000038	Edeka Grocery	Electric motor 2.2 kw	Draft	No Commitment	\$499.95	Admin	29 Feb 15:25
PO000037	Edeka Grocery	Electric motor 2.2 kw	Draft	No Commitment	\$499.95	Admin	29 Feb 15:24
PO000036	Edeka Grocery	Electric motor 2.2 kw	Draft	No Commitment	\$499.95	Admin	29 Feb 15:20
PO000035		Office Coffee	Draft	No Commitment	\$556.00	Admin	29 Feb 15:07
PO000034	Edeka Grocery	Office Coffee	Draft	No Commitment	\$556.00	Admin	29 Feb 14:52
PO000033	Amazon Online	Battery power source...	Draft	No Commitment	\$0.00	Admin	29 Feb 13:52
PO000032	Amazon Online	Battery power source...	Draft	No Commitment	\$0.00	Admin	29 Feb 13:47
PO000031	Amazon Online	Rechargeable battery...	Draft	No Commitment	\$0.00	Admin	29 Feb 13:43
PO000030	Edeka Grocery	Electric motor 2.2 kw	Draft	No Commitment	\$0.00	Admin	29 Feb 13:40
PO000029	Edeka Grocery	Electric motor15 kw	Draft	No Commitment	\$0.00	Admin	29 Feb 13:36
PO000028	Edeka Grocery	Electric motor15 kw	Draft	No Commitment	\$0.00	Admin	29 Feb 13:31

Supplier needs to be selected for the newly created PO. You may need to remove some of the line items that may be provided by another supplier. You can create several POs out of a single Requisition.

Purchase Orders > Sliding Door Cabinet

PO Header

Title: Sliding Door Cabinet

Supplier: Select Update Cancel

PO Number: PO000040

PO Status: Draft

Branch: Procuman Software

BID: None

Cost Center: 100

Financial Status: No Commitment

Required Documents: None

Notes to Supplier: None

Assigned To: William William

Our Contact: None

Supplier Reference: None

Payment Terms: Cash On Delivery

Inco Terms: EXW

Internal Notes: None

Workflow Action: No Action

Teams: william

Created: Today 14:54 > William William

Modified: Today 14:54 > System

Followers: William William

After “Supplier” is selected “Receive Invoice” button and “Send PDF to Supplier” buttons appear in Purchase Order detail view.

Purchase Orders > Sliding Door Cabinet

PO Header

Title: Sliding Door Cabinet

Supplier: Edeka Grocery

Required Date: 09 Mar

Our Contact: None

Supplier Reference: Sliding door

Payment Terms: Cash On Delivery

Inco Terms: EXW

Internal Notes: Terms: EXW

Workflow Action: No Action

PO Number: PO000041

PO Status: Negotiation

Branch: Procuman Software

BID: BID00043

Cost Center: 100

Financial Status: No Commitment

Required Documents: None

Notes to Supplier: None

Assigned To: William William

Teams: william

Created: Today 11:08 > William William


Modified: Today 11:11 > William William

Followers: William William

Buttons: Followed, Receive Invoice, Send PDF to Supplier

After “Send PDF to Supplier” button is pressed, the supplier will get email notification with PDF file of the PO attached, including Purchase Order No., Purchase Order Date, Item Description, List Price, Payment Terms, Delivery Date, etc.

PO will be sent to Supplier's default email address as PDF attachment. View the sent email in the stream below.

Yes  No

Followed Receive Invoice Send PDF to Supplier

PO Header

Title Sliding Door Cabinet	PO Number PO000041
Supplier Edeka Grocery	PO Status Negotiation
Required Date 09 Mar	Branch Procuman Software
Our Contact None	BID BID000043
Supplier Reference Sliding door	Cost Center 100
Payment Terms Cash On Delivery	Financial Status No Commitment
Inco Terms EXW	Required Documents None
Internal Notes Terms: EXW	Notes to Supplier None
Workflow Action No Action	Assigned To William William

Teams
William William
Created
Today 11:08 - William William
Modified
Today 11:11 - William William
Followers
William William

PURCHASE ORDER

Procuman Software

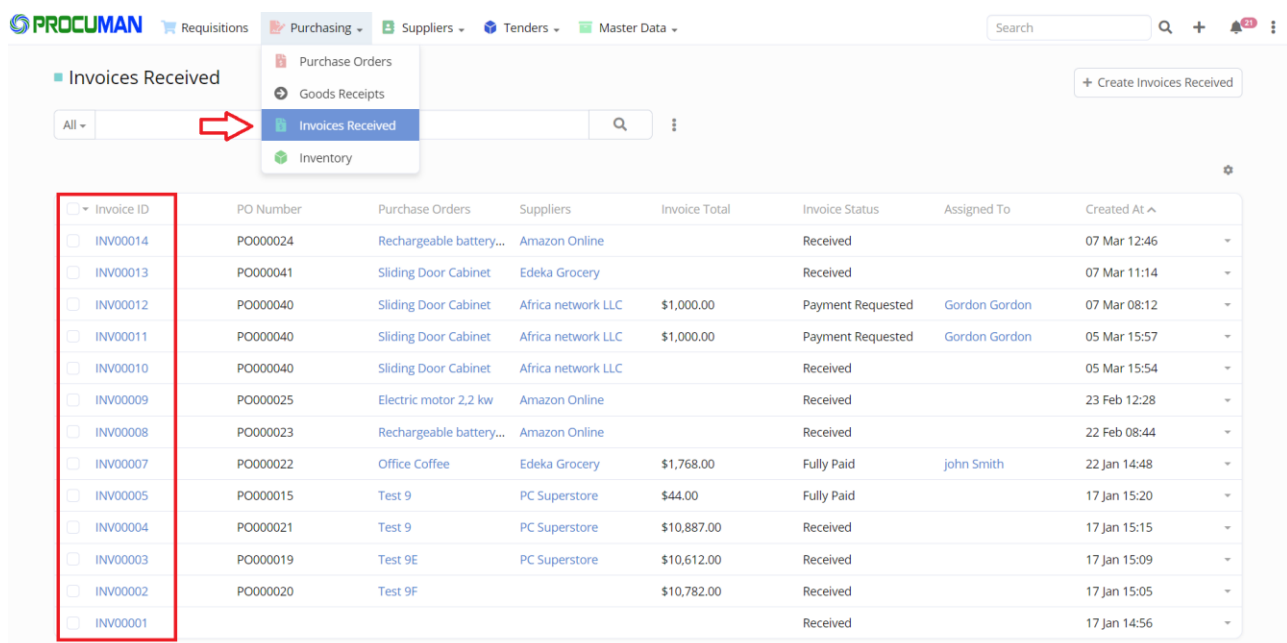
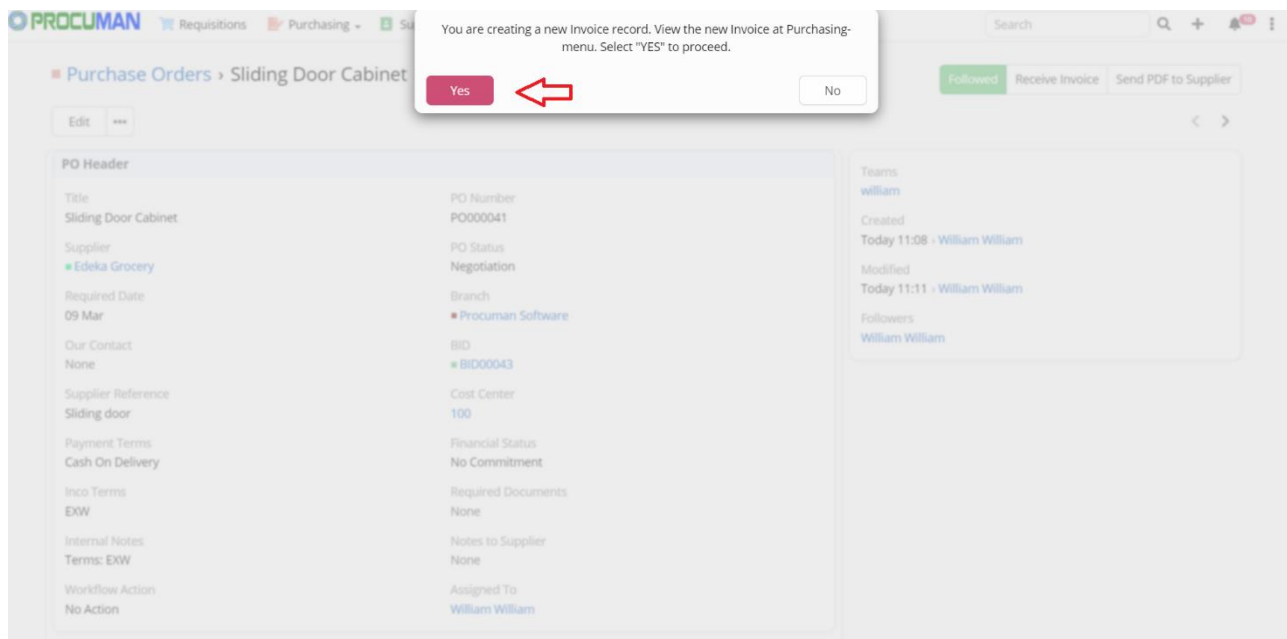
Type Local Purchase Order	Purchase Order No. PO000040
Purchase Order Date 06.03.2024	Created By William William
Supplier Ref.	

SUPPLIER	SHIP TO	BILL TO
Africa network LLC Uganda	Procuman Software Paju Tn 2 50603 Tartu Estonia	Procuman Software Paju Tn 2 50603 Tartu Estonia Phone: +68765465422 Email: info@procuman.com

Incoterms	Payment Terms	Delivery Date	Contact Person	Contact Email
EXW	Cash On Delivery	09.03.2024		

Supplier Item Code	Item Description	Unit	Qty	List Price	Discount %	VAT %	VAT Amount	Price	Net Amount
	Sliding Door Cabinet		1.00	1,000.00	0.00	0%	0.00	1,000.00	1,000.00
List Price Total								1,000.00	
Discount								0.00	
Net Amount USD								1,000.00	
Tax								0.00	
Total Amount Incl Tax USD								1,000.00	

After “Receive Invoice” button is pressed, a new invoice record is created. View it in the main “Purchasing”- menu, “Invoices Received”-submenu.



After selecting and opening the invoice in the “Invoices Received”-submenu, Purchase Agent can confirm that the actual invoiced amount per line item is same as the ordered amount in the original PO. Also the actual invoiced quantity can be compared with the quantity of delivered items.

Payments can be requested from the finance team by selecting the Workflow action “Request Payment” and selecting the responsible person from the finance team. The person responsible for the payment will receive an email notification.

PROCUMAN Requisitions Purchasing Suppliers Tenders Master Data

Search

Edit

INV00012 PO000040

Purchase Orders
Sliding Door Cabinet

Suppliers
Africa network LLC

PO Total
\$1,000.00

Cost Center
100

Description
None

Invoice Status
Payment Requested

Supplier Invoice Number
None

Invoice Total
\$1,000.00


Invoice File
None

Created
Today 08:12 - William William

Modified
Today 08:14 - System

Followers
Gordon Gordon

Workflow

Workflow Action  Update Cancel Assigned To
Request Payment Gordon Gordon

No Action

Request Payment

Purchase Order Lines

Row	Product Name	Order QTY	Delivered QTY	Invoiced QTY	Total
PO000040-1	Sliding Door Cabinet	1.000			\$1,000.00
Total:					\$1,000.00

PROCUMAN Requisitions Purchasing Suppliers Tenders Master Data

Search

Edit

INV00012 PO000040

Purchase Orders
Sliding Door Cabinet

Suppliers
Africa network LLC

PO Total
\$1,000.00

Cost Center
100

Description
None

Invoice Status
Payment Requested

Supplier Invoice Number
None

Invoice Total
\$1,000.00

Invoice File
None


Created
Today 08:12 - William William

Modified
Today 08:14 - System

Followers
Gordon Gordon

Workflow

Workflow Action Request Payment

Assigned To *  Update Cancel
Select William William

Invoice Lines

Purchase Order Lines

Row	Product Name	Order QTY	Delivered QTY	Invoiced QTY	Total
PO000040-1	Sliding Door Cabinet	1.000			\$1,000.00
Total:					\$1,000.00

Select Users

Cancel

Active

Name	User Name	Email	Approving Manager	Roles
William William	william	info@procuman.com		Purchase Agent Role
Admin	admin	timo@procuman.com	Gordon Gordon	
albert albert	albert	info@procuman.com		Approver Role
Denis Admin	denisadmin	denis@procuman.com		
Gordon Gordon	gordon	info@procuman.com		Finance Role
Jack Jack	jack	info@procuman.com	albert albert	Requestor Role
No Edit	no-edit			

Payment processor user will open the invoice in the “Invoices Received”-submenu and selects “+” sign in the “Payments” subpanel and creates payment record in the pop-up window.

Procuman

Requisitions Purchasing Suppliers Master Data

Search

Gordon Gordon

Preferences

Last Viewed

About

Log Out

Cost Center: 100

Invoice File: None

Description: None

Workflow

Workflow Action: Request Payment

Assigned To: Gordon Gordon

Invoice Lines

Row	Product Name	Order QTY	Delivered QTY	Invoiced QTY	Total
PO000040-1	Sliding Door Cabinet	1.000			\$1,000.00
Total:					\$1,000.00

Payments

No Data

Create Payment

Save Full Form Cancel

Date of Payment: 07.03.2024

Paid Amount: USD

Payment Type: Invoice

Payment Remarks:

Proof of Payment:

Purchase Order Lines

Row	Product Name	Order QTY	Delivered QTY
PO000040-1	Sliding Door Cabinet	1.000	

Goods Receipt

Goods can be received by each PO line item separately. Edit the PO record and enter the quantity of received goods in the GR QTY field. This will change the PO status as Delivered or Partially Delivered and increases the Delivered count on the line item. Also Inventory record will be created and the goods will be placed at the “Received Goods Area” warehouse.

Line Items

Purchase Order Lines

Product Name	Order QT...	Purchase Price	Total	Delivered ...	GR QTY
Sliding Door Cabinet	1	\$750.00	\$750.00	1.000	<input type="text"/>

5. Inventory

In the “Inventory” module products’ quantity on-hand can be seen in their warehouse locations. Product can be excluded from inventory tracking in Products module.

The screenshot shows the Procuman.com interface with the 'Inventory' module selected. A dropdown menu for 'Purchasing' is open, showing options like 'Purchase Orders', 'Goods Receipts', 'Invoices Received', and 'Inventory'. The 'Inventory' table lists various items with their respective quantities on hand. A red box highlights the 'Products' column, and a red arrow points to the '+ Create Inventory' button.

Warehouse	Location	Products	Qty On-Hand
<input type="checkbox"/> Main Warehouse	None	Pocket torch	1.000
<input type="checkbox"/> Goods Receipt Area	None	Paper Towels	6.000
<input type="checkbox"/> Main Warehouse	A153	Paper Towels	12.000
<input type="checkbox"/> Goods Receipt Area	None	Coffee Beans	39.000
<input type="checkbox"/> Main Warehouse	B2	Lenovo Screen	1.000
<input type="checkbox"/> Main Warehouse	None	Lenovo Screen	2.000
<input type="checkbox"/> Goods Receipt Area	None	Lenovo Screen	13.000

Products can be picked, added or transferred to another location in the “Transactions” panel in the inventory record detail view.

The screenshot shows the 'Inventory' record detail view for a specific product. The breadcrumb shows 'Inventory > 65f19ba5992b5b5b2'. The 'Overview' section displays the product 'X1 Lenovo Laptop' in the 'Goods Receipt Area' warehouse with a quantity on hand of 3.000. The 'Transaction' section features a dropdown menu for 'Transaction' with options: 'Pick from Stock', 'Add to Stock', and 'Transfer'. A 'Qty for Action' input field is also present.

Products

In the Products module each Product will display the Total Quantity On-Hand and Quantity On Orders. On Orders count is calculated by scheduled workflow where PO line status is Submitted or Partially Delivered.

■ Products > Lenovo Screen

[Edit](#)
[...](#)

Overview

Name	Lenovo Screen	Internal Item Code	None
Supplier Part Number	LS678	Expiry Date ⓘ	None
Description	None	Product Documents	None
GL Account	None	UOM	Pieces
Best Price	\$332.00	Preferred Suppliers	■ PC Superstore
Product Type	Goods	Category Products	IT Hardware
Inventory Active ⓘ	<input checked="" type="checkbox"/>	Total Qty On-Hand	16.000
Qty On Orders	8.000	Min. Stock Qty ⓘ	None

6. Budget

Spend management is done under Master data -> Budget. Each cost center budget can be defined with a monthly period and with a budgeted amount. All submitted POs for a cost center will calculate towards the Period Spend amount (calculation runs a scheduled workflow). A cost center can be defined in each user profile which is then copied to the Requisition and PO.

■ Budgets > 100 2-2024

Edit

...

Overview

Name

100 2-2024

Period Month

02

Period Year

2024

Cost Center

100

Budgeted Amount

1,000.00

Period Spend

875.00

Remaining

125.00

Remarks

None

Period Start Date

01 Feb

Period End Date

29 Feb

...

7. Administration

7.1. Roles and Teams Explanations

Roles define which modules are visible for the user and what record level access rights user have for module's records. When user is created, also a new Team is created with the same name as the username. This is set as user's default team and all records created by the user will get user's default team. "Team" level access in Role read right means that user will retain read-only rights for the records he has created and his default team is added to the record's list of Teams automatically. Record owner is the user to whom the record has been assigned to. Usually the record owner has edit rights for the record.

Each user should be given only one role (exception if Bid Evaluator also needs to be approver for requisitions, then he can be assigned also the PR Approver Role). Each role contains the basic rights to create Requisitions.

BID Evaluator Role

This role can be given to users that evaluate the incoming supplier bids. Bid evaluator will only see the bids when the RFQ status has changed to “In Evaluation” and after the bidding deadline is due.

Finance Role

For users who need to create payment records. This role can also approve requisitions.

PR Approver Role – PR + PO Approver Role

These users can approve Purchase Requisitions or/and Purchase Orders. The approval limit (in default currency) is set in the user profile. You can set the approval limit to -1 if user should only review Requisitions and then forward to next level approver.

Requestor Role

Requestor can only create requisitions and send them for approval.

Purchase Agent Role

This role will give access rights to all modules except the System Administration.

Special Purpose Teams

Workflows that are executed using the action buttons (Create PO, Create RFX, ...) require that the user also belongs to a specific team. These are:

- BID Evaluators
- Team PR Approvers
- Team Purchase Agents

For Supplier Portal, it's users, roles and teams are maintained in a separate module in system administration.