Purchase Request

Bizagi Suite
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The purchase applicant selects products or services that are needed. The case goes to the person’s boss who will request changes, reject or approve. If the case is approved, a policy will evaluate if the boss has the level of authority to approve the amount. If the boss does not, the case will go to his/her boss, and so on. The Quotations and Purchase Orders subprocesses are created to continue with the request. The Purchase Request process is the formal procedure of buying goods and services. It begins with the identification of products or services needed by the logged user, who selects them from a list or enters its description.

According to the price of the request it needs approval from the user’s boss. Once the request has been approved, quotations are asked for to the appropriate number of potential suppliers. In this process, there can only be one selected supplier for all the products or services requested. Quotations are selected according to the delivery date, price and quality.

The Purchasing department selects a supplier and generates a Purchase Order that is sent to the selected supplier and saved in the company’s ERP.
Data model
Process Elements

Create Purchase Request

Description

The requested products are selected from a list, or can be requested as new products. There should be at least one product registered.

The requested delivery date, delivery information and products specifications can be entered.

Performers

Applicant

Duration

1 hour

On Enter

Set today's date and Request By user

On Exit

1- There has to be at least one product added

2- Sets the authority level

3- Sets the user that created the case

4- Calculates the estimated cost
Authorize Request

Description

The boss of the applicant authorizes the purchase request.

Performers

Boss

Duration

3 hours

On Enter

Adds an approval record

On Exit

Updates the approval record
Request Authorized

Description

According to the total price of the purchase request, a set of approvals might be needed.

If the boss that approved in the first place does not have the authority level to approve the amount requested, his/her boss will approve and so on.
Gates

- No: The purchase request is rejected.
- Changes are required: The purchase request needs changes.
- Requires another approval: The request is approved AND the boss does not have the authority level.
- Yes: The request is approved AND the boss has the authority level.

**Notify approval**

Description

E-mail sent to the Purchase Request applicant.

Performers

Automatic

Script

Dear <PurchaseRequest.RequestedBy.fullName>

Your purchase request for case number <RadNumber> has been approved.

Your request is (Products requested grid)

Here is a copy of all the approval process records. (Approval collection)

This is an auto generated e-mail. Please do not reply

**Quotations**

Description

A single process of Quotation will be created, as soon as the Purchase Request is approved. In this process, the Purchasing Department will request all the necessary quotations.

Performers

Purchasing Department

Process

Quotations
**Purchase Order**

**Description**

A Purchase Order process is created when a supplier is selected. In this process, the Purchasing Department will generate the Purchase Order document.

**Performers**

Purchasing Department

**Process**

Purchase order

---

**Notify rejection**

**Description**

E-mail sent to the Purchase Request applicant

**Performers**

Automatic

**Script**

Dear <PurchaseRequest.RequestedBy.fullName>

Your purchase request for case number <RadNumber> has been rejected.

Your request was (Products requested grid)

Here is a copy of all the approval process records. (Approval grid)

This is an auto generated e-mail. Please do not reply

---

**Notify Required Changes**

**Description**

E-mail sent to the Purchase Request applicant

**Performers**

Automatic
Script

Dear <PurchaseRequest.RequestedBy.fullName>

Your purchase request for case number <RadNumber> requires some changes.

Your request was (Products requested grid)

Here is a copy of all the approval process records. (Approval collection)

This is an auto generated e-mail. Please do not reply
The Quotation process requires the Purchasing department to request and receive quotations. Then, one will be selected: in order to choose a supplier with whom the purchase request will be carried out.
Form tabs

- **Request Information**
  - Requested by:
  - Cost Center:
  - Purchase justification:
  - Request Date:

- **Delivery Information**
  - Delivery address:
  - Required Delivery Date:
  - Country:
  - State:
  - City:

- **Approval Information**
  - Purchase Approval
    - Approval Date
    - Approved
    - Observations
    - Approval User
Data model
Process Elements

Request Quotations

Description

In this activity, all the required quotations will be requested. Suppliers should be searched from a list. If a supplier is not included in the list, an administrator should include the information through the Admin option.

Performers

Quotations Request

Duration

2 days

On Enter

Set the Total cost of the estimated unit prices, to the attribute TotalCost

On Exit

1- Policy: Sets the number of quotation required

2- Evaluate if the number of quotations required are entered

Form

![Form Image]
Receive Quotations

Description

For each received Quotation a set of information is needed. The minimum number of quotations required is handled through a Business Rule, according to the total price of the purchase. The user can choose to ignore the Business Rule and continue with fewer quotations than required.

On Enter

Sets the products that are requested to each supplier.

On Exit

Evaluate if the number of quotations required are entered.

Form

<table>
<thead>
<tr>
<th>Quotations</th>
<th>Request information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requested Products</td>
<td></td>
</tr>
<tr>
<td>Products Requested</td>
<td></td>
</tr>
<tr>
<td>Supplier</td>
<td>Cost</td>
</tr>
<tr>
<td>Use only Selected:</td>
<td>Yes</td>
</tr>
</tbody>
</table>

Select Supplier

Description

The user will select the supplier. Each one will show the delivery date and price. Additionally a ranking based on quality is displayed to make the selection easier.
Performers
Select Supplier
Duration
4 hours
On Enter
Sets all the suppliers to “Not Selected”
On Exit
Calculates the total Actual Cost of the purchase.

Form
Purchase Order

The Purchasing Department will generate a Purchase Order for the supplier, indicating types, quantities, and agreed prices for the requested products.

This Purchase Order needs approval from the Administrative Manager. Once it has been approved it will be sent to the supplier via email. It will also be generated in the ERP of the company using an interface.
Form tabs

Purchase Order  Request information

Request Information

Requested by: Request Date:
Cost Center:
Purchase justification:

Delivery Information

Delivery address: Required Delivery Date:
Country:
State:
City:

Approval Information

Purchase Approval

<table>
<thead>
<tr>
<th>Approval Date</th>
<th>Approved</th>
<th>Observations</th>
<th>Approval User</th>
</tr>
</thead>
</table>


**Data model**

**Process Elements**

**Create Purchase Order**

**Description**

The required information for the Purchase order is entered. Also the user has to generate a pdf of the Purchase order.

**Performers**

Purchase order

**Duration**

1 day
On Enter
Sets the attributes of the Quotation selected and the supplier in the Order

On Exit
Sets if the order requires approval
Set Purchase Order like not Invoiced

Form
### Requires approval?

**Description**

A business rule will evaluate if the Purchase Order requires approval, according to its total price.

**Gates**

- **Yes**: The Purchase Order requires approval.
- **No**: Default.

### Approve Order

**Description**

The Purchase Manager approves or requests changes for the Purchase Order.

**Performers**

Manager

**Duration**

4 hours

**On Enter**

Creates an approval record

**On Exit**

1. Updates the approval record
2. Sets the user that approves
Form

Purchase Order | Request information

Supplier

Id number:  
Country:  
State:  
City:  
Telephone:  
Fax:  
Payment Term:

Supplier:  
Email:  
Address:  

Quotation information

Quotation File:
Quality Score:

Quoted Products

<table>
<thead>
<tr>
<th>Description</th>
<th>Product Specification</th>
<th>Quantity</th>
<th>Unit Price</th>
<th>Total Price</th>
<th>Units</th>
</tr>
</thead>
</table>

Cost:
Delivery Date:
Order date:
Order Number:
Payment Term:
Payment Option:

Purchase Order File:  
Order State:
<table>
<thead>
<tr>
<th>Approved</th>
</tr>
</thead>
<tbody>
<tr>
<td>Request Change</td>
</tr>
</tbody>
</table>

Order Observations:
Approved?

Description
Evaluates if the Manager approved the Order or it requires changes. If it requires changes, the case will return to the person in charge of the ‘Create Purchase Order’ activity.

Gates
- Modify Order: The Purchase Order requires changes.
- Yes: Default.

Send Purchase Order to supplier

Description
Email sent to the supplier with a carbon copy to the Purchase Manager, with the Purchase Order.

Performers
Automatic

Script
Dear <Quotations.Supplier.Supplier>
We have received your quotation and we are satisfied with the conditions. Attached to this e-mail you will find the Purchase Order. Please feel free to contact us if you have any questions.
Best regards, Bizagi Purchase Team

Generate Order and send to ERP

Description
An interface connects with the ERP of the company to generate the Purchase Order in the system. To learn about interfaces please refer to: http://wiki.Bizagi.com/en/index.php?title=SOA_Interface
Performers
Automatic
On Exit
Executes the interface that updates the ERP of the company with the information of the Purchase Order.
The file number returned by the system is saved in the attribute ERPPurchaseOrderNumber
Implementation
WebService

- **Update ERP**

Description
When the ERP is not updated correctly, this activity will be enabled. The user has to update the ERP manually.

Performers
Purchase Assistant
Duration
4 hours
Form

### Purchase Order

- **ERP Purchase Order Number:**

### Supplier

- **Id number:**
- **Supplier:**
- **Country:**
- **State:**
- **City:**
- **Telephone:**
- **Fax:**
- **Email:**
- **Address:**
- **Payment Term:**

### Quotation information

- **Quotation File:**
- **Quality Score:**

<table>
<thead>
<tr>
<th>Quoted Products</th>
<th>Description</th>
<th>Product Specification</th>
<th>Quantity</th>
<th>Unit Price</th>
<th>Total Price</th>
<th>Units</th>
</tr>
</thead>
</table>

- **Cost:**
- **Delivery Date:**
- **Order Date:**
- **Order Number:**
- **Payment Term:**
- **Payment Option:**
Performers

Applicant (Entity)
Boss (Entity)
Automatic (Role)
Purchasing Department (Entity)
Quotations Request (Role)
Quotation Receive (Role)
Select Supplier (Role)
Purchase order (Role)
Manager (Entity)
Purchase Assistant (Role)