PURCHASE MANAGEMENT

 is a software for document management that natively integrates a powerful workflow module.

This software allows you not only to digitally manage the documents archive (documents can be easily found and shared, thus reducing paper use), but also to use them in a process: with the WORKFLOW module the process guides every user through specific TASKS (actions to perform) that come directly on the user's desktop. Other information available for each process is also document type, notes, actions.

PURCHASE ORDERS APPROVAL

Orders come from an MRP that produces purchase requirements, converted into orders from Buyers.

PDF orders are generated from the ERP system and then archived in ARXivar, thus triggering the approval process.

Executors will perform the Order Approval activities, which can change depending on:

- product group
- expense limit
- role of responsible person
- etc...

All this information, however, is not static, and we do not know how many executors we will have for an order.
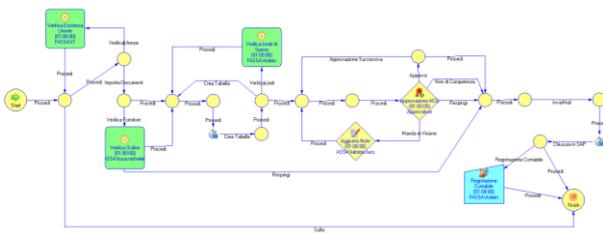
PAYMENT APPROVAL OF THE PURCHASE INVOICES

The purpose of this workflow is to create a payment approval system for the managers depending on their personal expense limit, to formalize approval operations in a flexible and modern structure, which can be changed during time.

The process checks if a purchase order exists and then check the adequacy order/invoice.

It determines approval hierarchies according to the product type and expense limit. It also manages approval limits and any notification for the users involved.

BILL BOOK – PAYMENT PLAN

The goal is to create and manage a bill book that must keep track of payment deadlines and document status involved in that logic.

This process management must be activated above all for the purchase invoices, for the automatic storage of the incoming documents in ARXivar; the process finds invoice details and payment methods to generate a payment plan with number for installments and deadlines.

Specific fields are set to the installments to identify amount and deadline. Every installment is subjected to workflow depending on the workflow deadline, set with a day offset before the effective deadline.
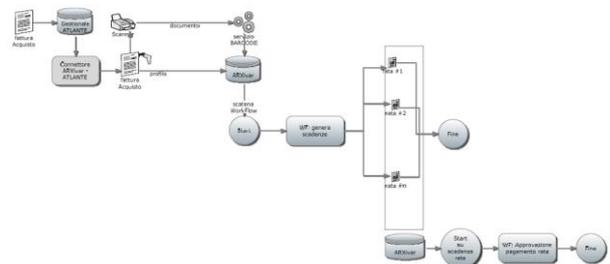

PURCHASE REQUEST MANAGEMENT

The purchase request is generated with an ARXivar template from the department managers; it is subjected to a workflow that checks budget, expense power and product type, by querying the ERP tables.

According to these elements the process will submit the purchase request through 4 approval levels.

When the request has been approved, it notifies the person who had made the request and the purchase department to create the order.

ORDER SENDING TO SUPPLIERS

The goal of this workflow process is to verify the sending of the order. Once this order is archived from the ERP, the workflow checks sending data (mail/fax) according to sending priority, checks required attachments and then sends the documents.
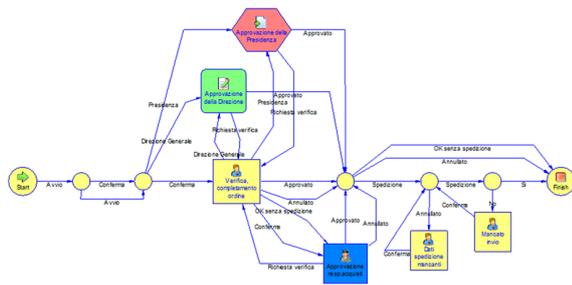
TENDERS MANAGEMENT

The goal of this workflow is to collect the required documentation to participate to a tender, with the relative approval tasks.

There are two particular features in this process:

1) The duration of the workflow can be measured in months. If you manage long procedures with workflow you can keep a constant track and always remember to perform needed activities.

2) Many units are involved in this process. By using this workflow you can activate more "independent" tasks at the same time, and then wait the end of the activities before the final approval.
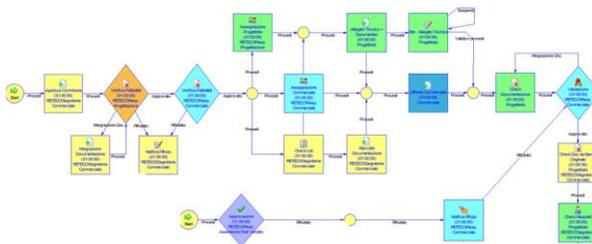
CONTRACTS MANAGEMENT (DEADLINES and RENEWAL)

With this process you can archive different supplier contracts, by setting contract type (Goods or Services), supplier code and deadline, supply value, selection mode, payment terms, etc… According to these data the workflow will take the documentation and send it to purchase or legal department. These departments will get the complete binder, with all the documents collected during the process.