Vendor Purchase Order - User Guide

by CedCommerce Products User Guides

1. Overview

Vendor Purchase Order Addon, developed by CedCommerce for Magento® 2.x enables the front-end users to submit the request of the product even if it is not available at the admin store.

Vendor purchase order entitles the admin to send the quotation to the registered vendors. Vendors can send their price and quantity based on which they want to deliver the product.

Depending upon the requirement, the admin has a choice to assign the quotation to a specific vendor. Front-end users can generate the request for the product by filling the form; through which they provide the image of the requested product and a document that describes the relative information of the product. They also need to provide the store URL – a website where actually the product is available, so that the admin or vendor can understand the actual requirements of the user.

This add-on has a dependency on the Marketplace Basic extension. It means, the admin has to install the Marketplace extension prior to the installation of the Vendor Purchase Order add-on.

Key features are as follows:

- Easy to Manage Front-end users request and a best way to provide a product.
- Admin can send the PO request to more than one registered vendors.
- Vendor can approve or disapprove the purchase order request.
- Offline Chat system enables users to chat with vendor regrading quotation details.
- On request approval, the users receive the invoice of purchase order.
- Easy to manage product invoice and send it to customer.
- Users and Vendors can negotiate over price and quantity.
- A user can add the product to cart once vendor approves the quotation.
- Registered users can send a purchase request to vendor and get a custom pricing.
- Registered users can edit or view a Purchase Order Quotation from their panel.

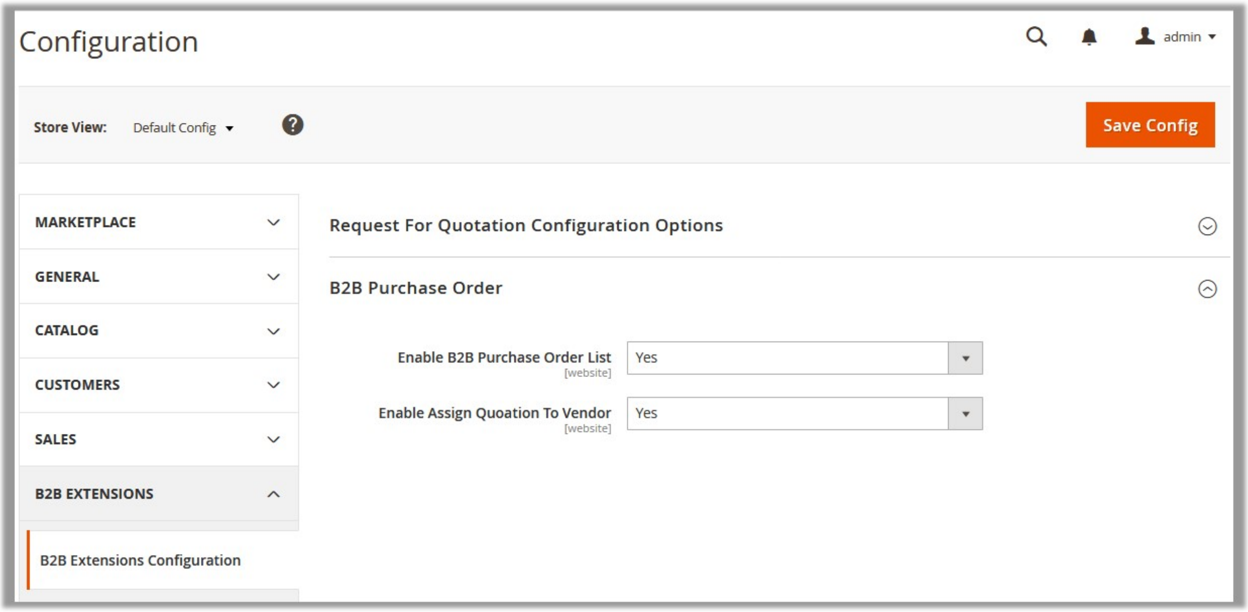
2. Configuration Settings

After installing the CedCommerce Purchase Order extension, the admin has to enable the Vendor Purchase Order extension.

To enable the Vendor Purchase Order extension feature

1. Go to the **Admin** panel.
2. On the left navigation bar, click the **STORES** menu, and then click **Configuration**.
   The **Configuration** page appears.

3. In the left navigation panel, click the **B2B EXTENSIONS** menu, and then click **B2B Extensions Configuration**.
   The **Configuration** page appears as shown in the following figure:



4. In the right panel, under **B2B Purchase Order**, do the following:
   a. In the **Enable B2B Purchse Order** list, select **Yes**.
      Note: Set the **Enabling the B2B Purchase Order** field to **Yes** to enable the **PO Request** tab on the Admin panel, PO Quotations tab on the Vendor panel, and the Submit Buying Request menu on the Front-end user account view.
   b. In the **Enable Assign Quotations To Vendor** list, select **Yes**.
5. Click the **Save Config** button.

3. Front-end View

Front-end users can do the following tasks:

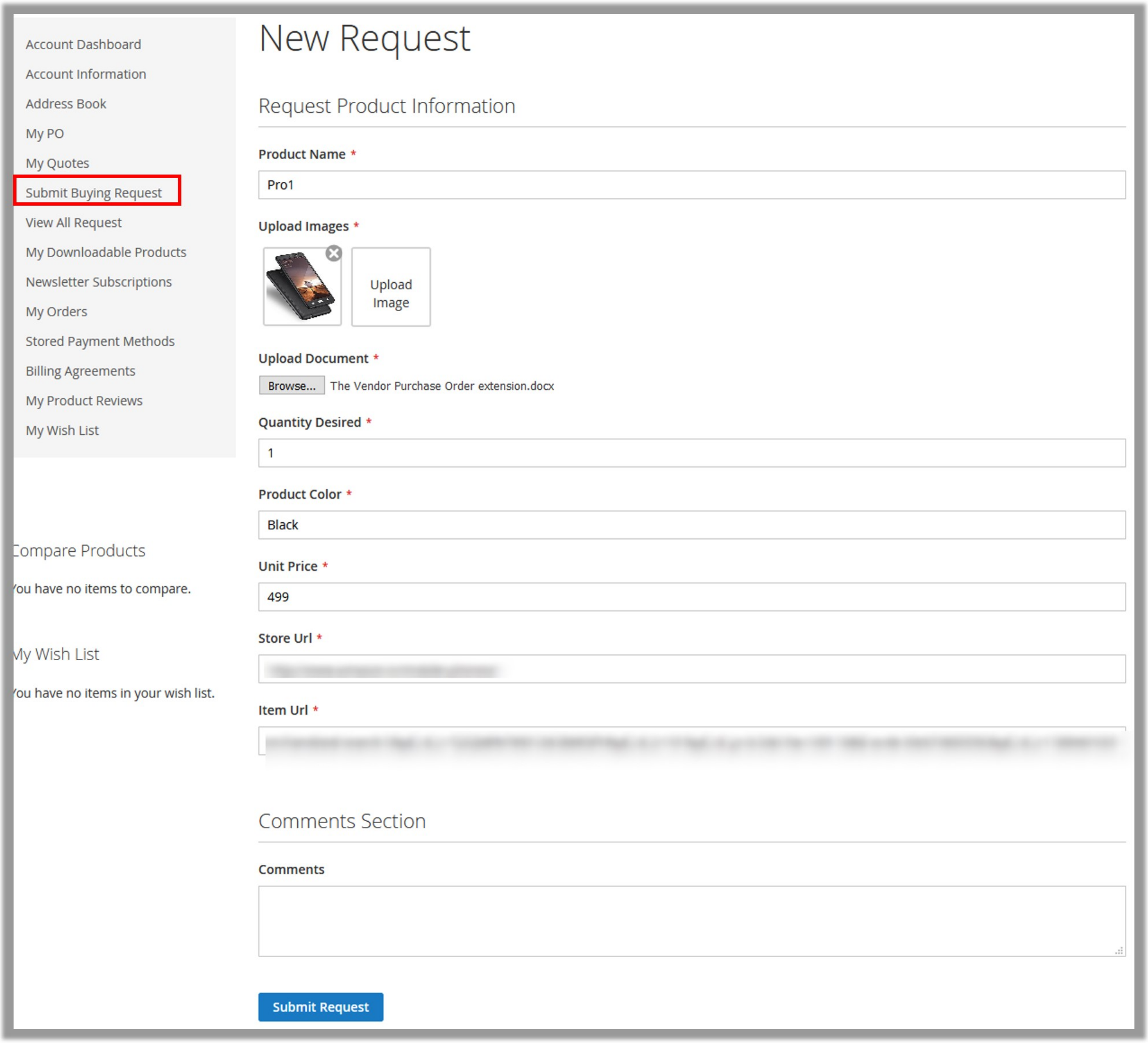
- Request Proposal from Front-End Users(http://docs.cedcommerce.com/magento-2/vendor-purchase-order-user-guide?section=request-proposal-from-front-end-users-2)
- View All Request on the Front-end View(http://docs.cedcommerce.com/magento-2/vendor-purchase-order-user-guide?section=view-all-request-on-the-front-end-view-2)
- Customer Request View After the Assigned Vendor Sends the Invoice(http://docs.cedcommerce.com/magento-2/vendor-purchase-order-user-guide?section=customer-request-view-after-the-assigned-vendor-sends-the-invoice)
- Place Order(http://docs.cedcommerce.com/magento-2/vendor-purchase-order-user-guide?section=place-order-front-end-view-2)

3.1. Request Proposal from Front-End Users

With the help of this add-on, the registered front-end users can send a request for a product, which is not even available at the admin store. Users can provide the information related to the required product such as the item URL and the store URL, where the user might have seen the product, but due to certain reasons do not want to buy from.

To send a request for product purchase

1. Go to the customer login.
2. In the left navigation menu, click the **Submit Buying Request** menu.
   The **New Request** page appears as shown in the following figure:



3. In the right panel, Under **Request Product Information**, enter the corresponding values in the following fields:
   - **Product Name**: Name of the product that the user wants to purchase.
   - **Upload Images**: Image of the product.
   - **Upload Document**: Product relevant information in the doc format.
   - **Quantity Desired**: The number of item required.
   - **Product Color**: Color of the product.
   - **Unit Price**: Purchasing Price of the single item.

- **Store Url**: Store URL, where the user has seen the product.
- **Item Url**: Item URL, which is linked to the required product. A URL, which provides more information related to the product.
- **Comments**: Relevant or some extra information related to the product.

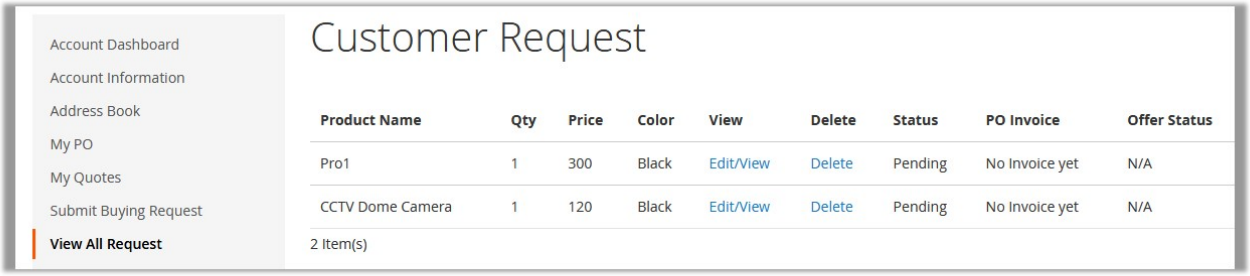
4. Click the **Submit Request** button.
   A success message appears.

3.2. View All Request on the Front-end View

Users can view the details of all the products they have send request for.

To view all the request for product purchase

1. Access the user account.
2. In the left navigation panel, click the **View All Request** menu.
   The **Customer Request** page appears as shown in the following figure:

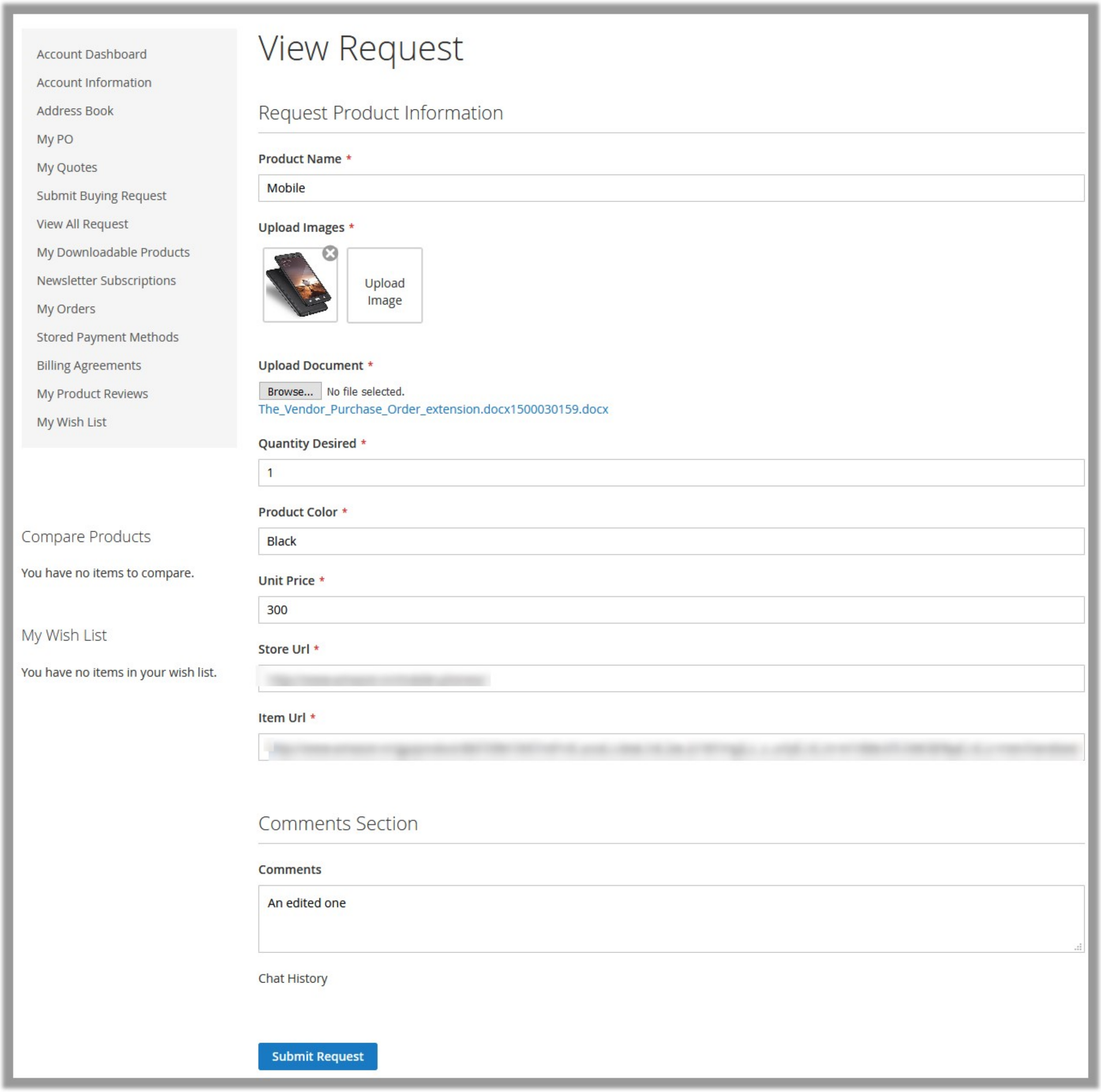


The users can do the following tasks:

- **Edit or view the request details**: Users can edit or view the request details.
- **View the Purchase Order invoice**: Once the vendor approves the product request and sends the invoice to the users, they can view the Purchase Order invoices.
- **Accepts Offer**: Once the vendor sends the invoice, the user can accept the offer or resend the request with the required price and quantity.
- **Delete the request**: Users can delete the request.
- **Add to cart**: Once the vendor approves the purchase request after price and quantity negotiation, the users can purchase the product.

To edit the request sent for product purchase

1. Access the user account.
2. In the left navigation panel, click the **View All Request**
   The **Customer Request** page appears.
3. In the right panel, scroll down to find the product that the users wants to edit or view.
4. In the **View** column, click the **Edit/View** link.
   The **View Request** page appears as shown in the following figure:



5. Make the required changes, and then click the **Submit Request** button.
   A success message appears. Thus, the changes are saved and resent to the admin.

To delete the request

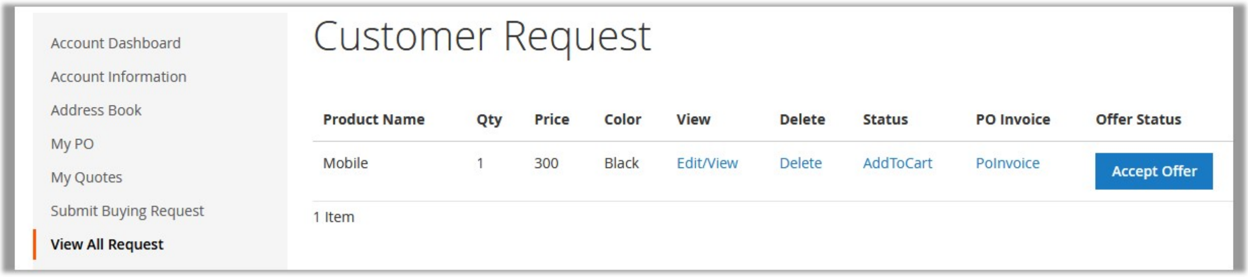
1. Access the user account.
2. In the left navigation panel, click the **View All Request**
   The **Customer Request** page appears.
3. In the right panel, scroll down to find the product that the user wants to delete.
4. In the **Delete** column, click the **Delete** button.

3.3. Customer Request View After the Assigned Vendor Sends the Invoice

Once the assigned vendor sends the invoice, the front-end user has the ability to accept the offer if the rate and quantity provided by vendor is acceptable. Otherwise, the user can again send the request with revised price and quantity.

To view the invoice

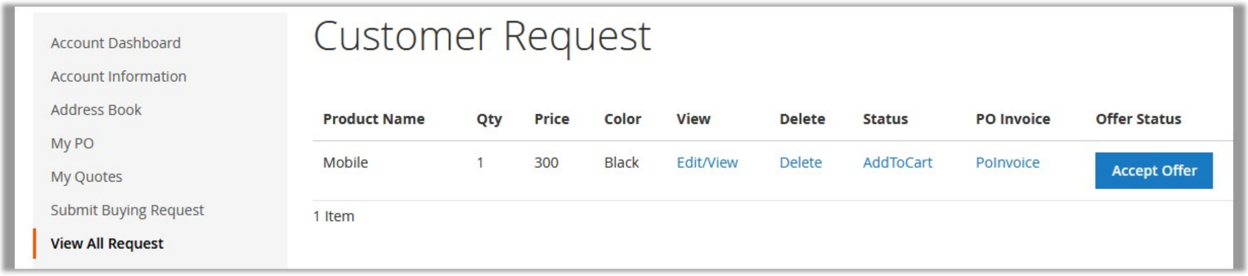
1. Access the user account.
2. In the left navigation panel, click the **View All Request** menu.
   The **Customer Request** page appears as shown in the following figure:



3. Scroll down to find the required product.
   - In the **PO Invoice** column, click the **PoInvoice**
     A PDF of generated invoice is opened to display the invoice details.

To accept the offer

1. Access the user account.
2. In the left navigation panel, click the **View All Request**
   The **Customer Request** page appears.



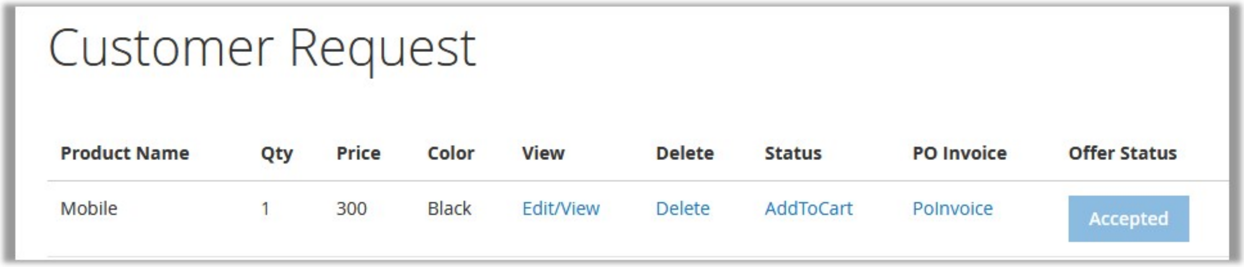
3. Scroll down to find the required product.
4. In the **Offer Status** column, click the **Accept Offer** button.
   The offer is accepted and sent back to vendor.

3.4. Place Order – Front-end View

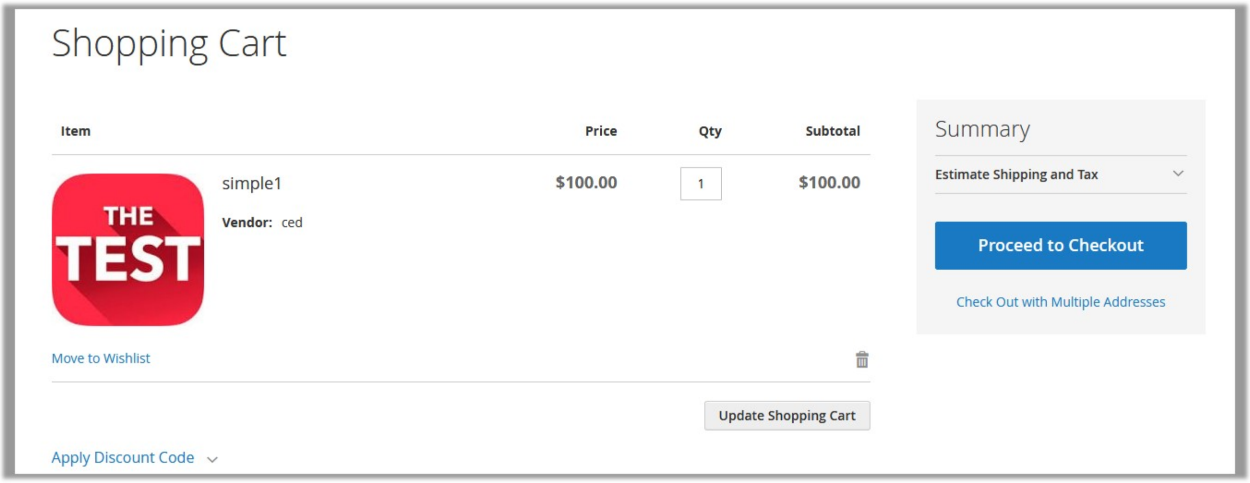
After the completion of all the negotiation process, when the user accepts the offer and the vendor approves it, the **AddToCart** link appears in the **Status** column. With the **AddToCart** link, the user can add the product to the cart and proceed further to place order.

To Place Order

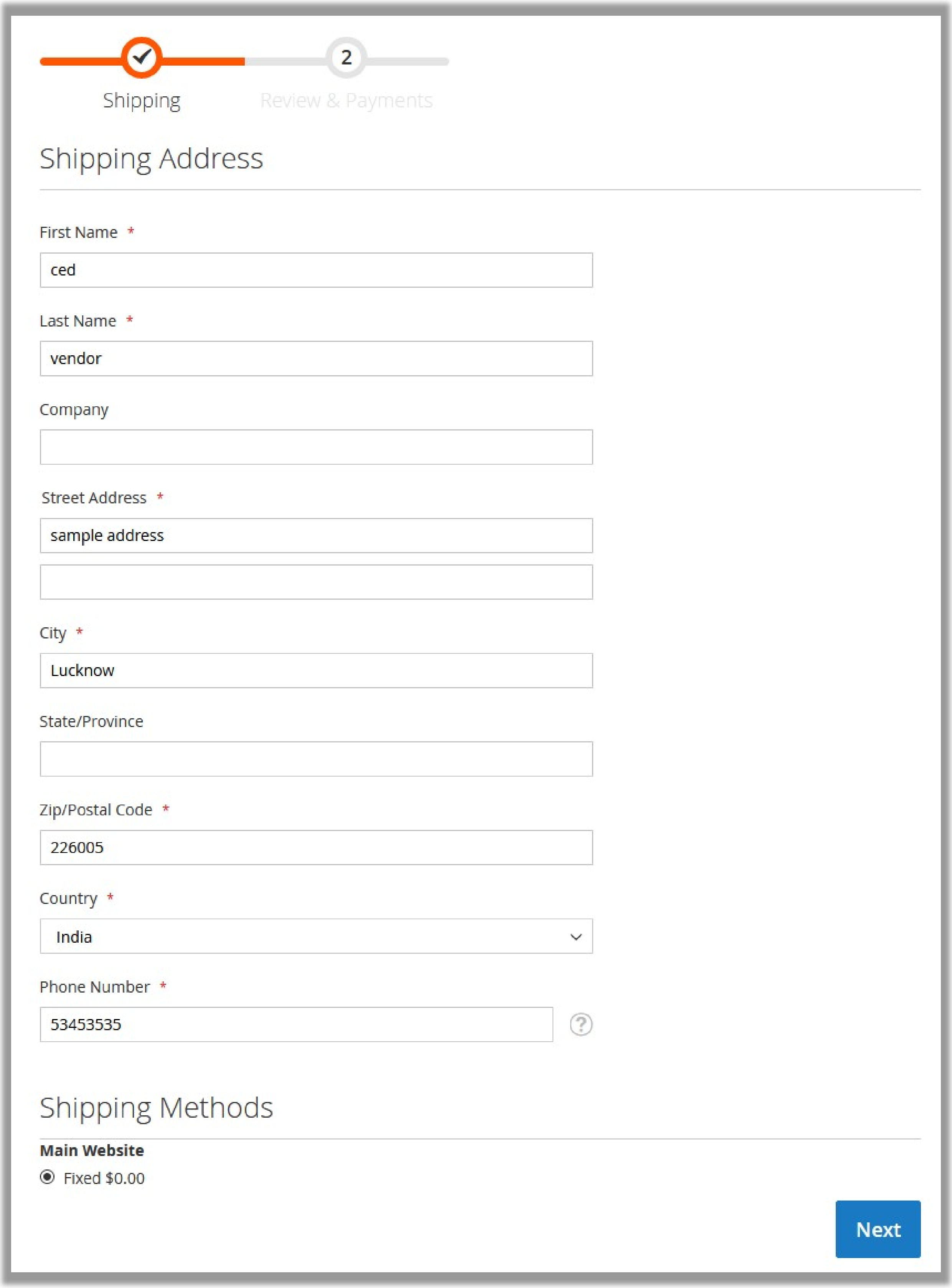
1. Access the User account.
2. In the left navigation panel, click the **View All Request** menu.



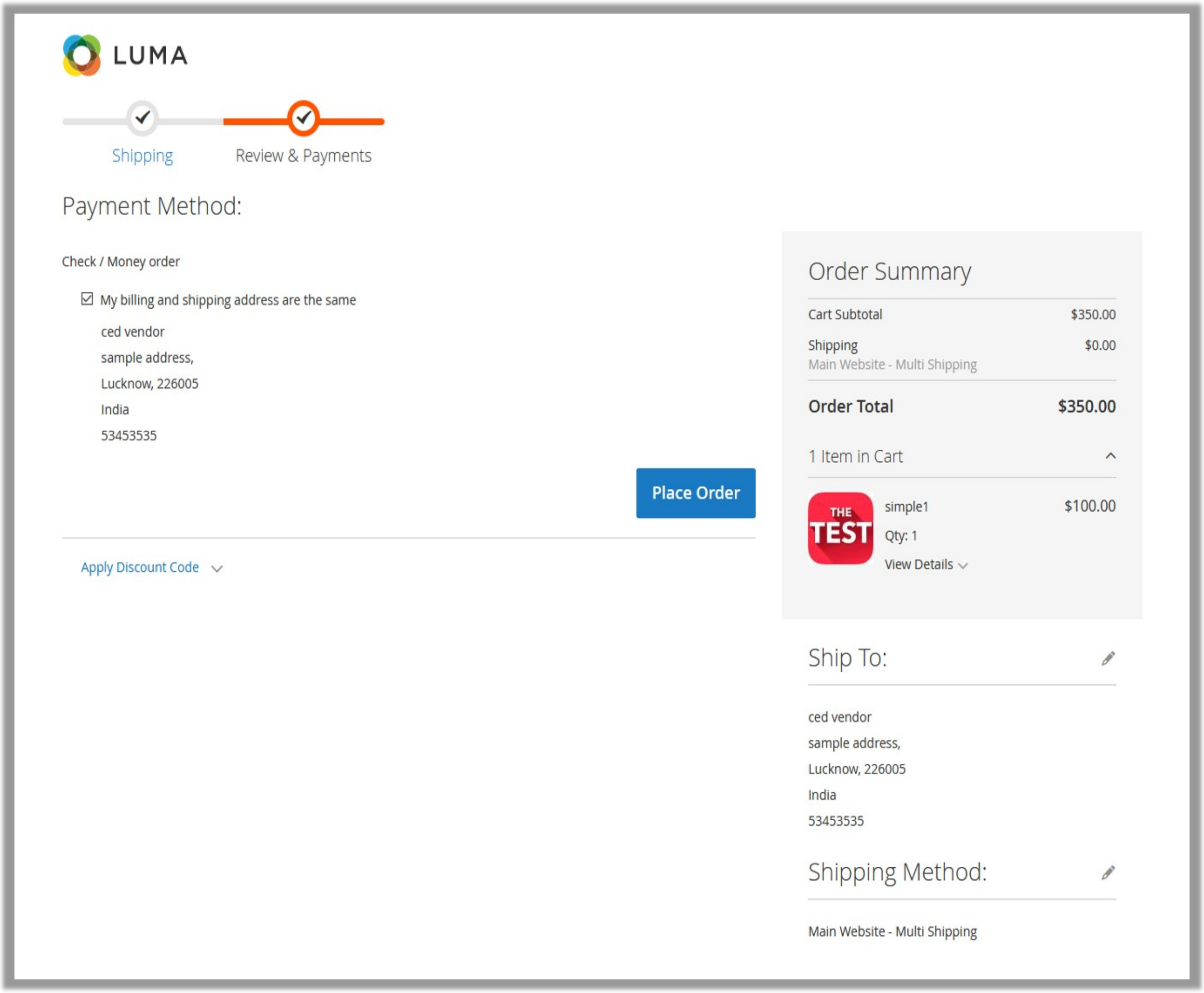
3. In the right panel, scroll down to find the required item.
4. In the **Status** column, click the **AddToCart** link.
   The page appears as shown in the following figure:



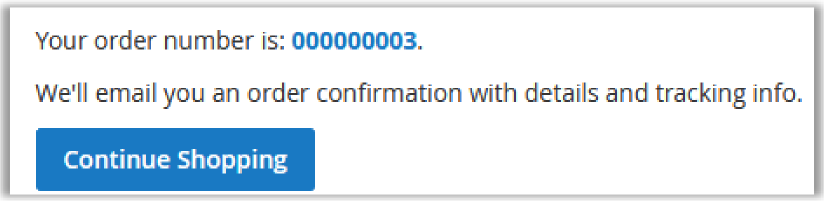
5. Click the **Proceed to Checkout** button.
   The page appears as shown in the following figure:



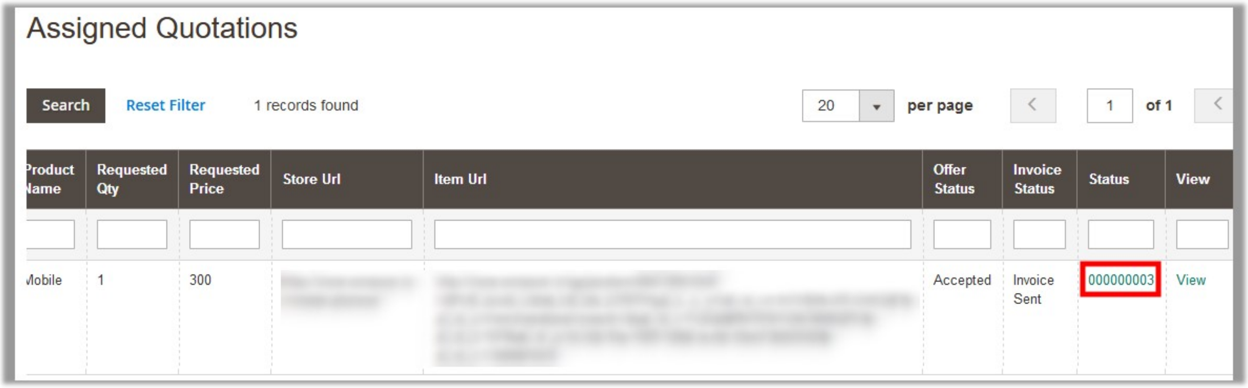
6. Click the **Next** button.
   The page appears as shown in the following figure:



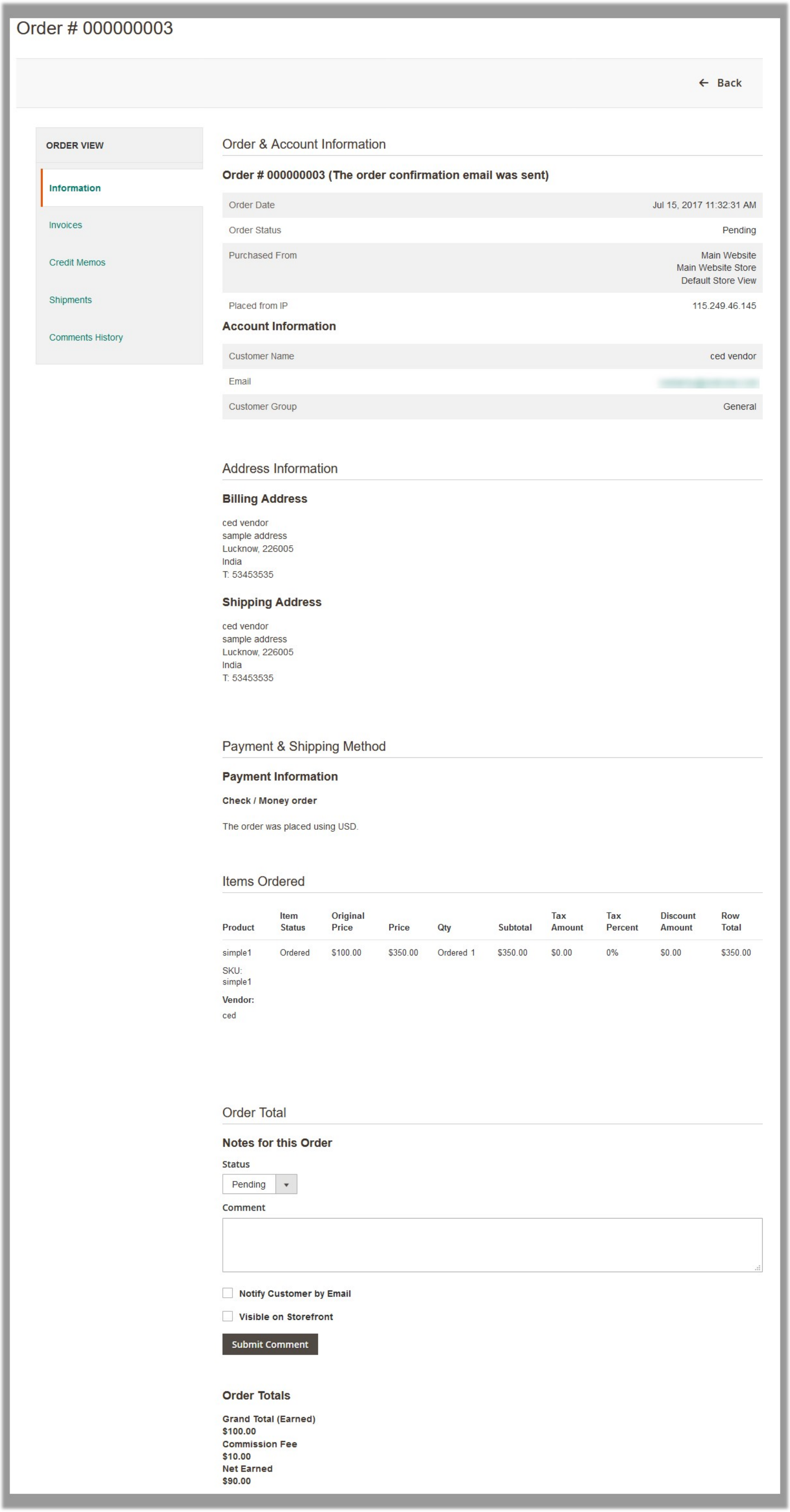
7. Click the **Place Order** button.
   The order is placed and the message appears as shown in the following figure:



Once the user places the order, it is sent back to the vendor. On the **Assigned Quotations** page, the status of the Purchase Order is changed and a link appears in the **Status** column.



8. In the **Status** column, click the link.
   Order Information page appears, where the vendor can view all the details relevant to the order placed.


Order # 000000003
Back
ORDER VIEW
Information
Invoices
Credit Memos
Shipments
Comments History
Order & Account Information
Order # 000000003 (The order confirmation email was sent)
Order Date
Jul 15, 2017 11:32:31 AM
Order Status
Pending
Purchased From
Main Website
Main Website Store
Default Store View
Placed from IP
115.249.46.145
Account Information
Customer Name
ced vendor
Email
Customer Group
General
Address Information
Billing Address
ced vendor
sample address
Lucknow, 226005
India
T: 53453535
Shipping Address
ced vendor
sample address
Lucknow, 226005
India
T: 53453535
Payment & Shipping Method
Payment Information
Check / Money order
The order was placed using USD.
Items Ordered
Product
Item Status
Original Price
Price
Qty
Subtotal
Tax Amount
Tax Percent
Discount Amount
Row Total
simple1
Ordered
$100.00
$350.00
Ordered 1
$350.00
$0.00
0%
$0.00
$350.00
SKU: simple1
Vendor:
ced
Order Total
Notes for this Order
Status
Pending
Comment
Notify Customer by Email
Visible on Storefront
Submit Comment
Order Totals
Grand Total (Earned)
$100.00
Commission Fee
$10.00
Net Earned
$90.00

4. Purchase Order Request on the Admin Panel

Once the admin installs the Vendor Purchase Order add-on and implements the configuration settings, the **PO REQUEST** menu appears on the left navigation bar of the Admin panel.

Admin can do the following tasks:

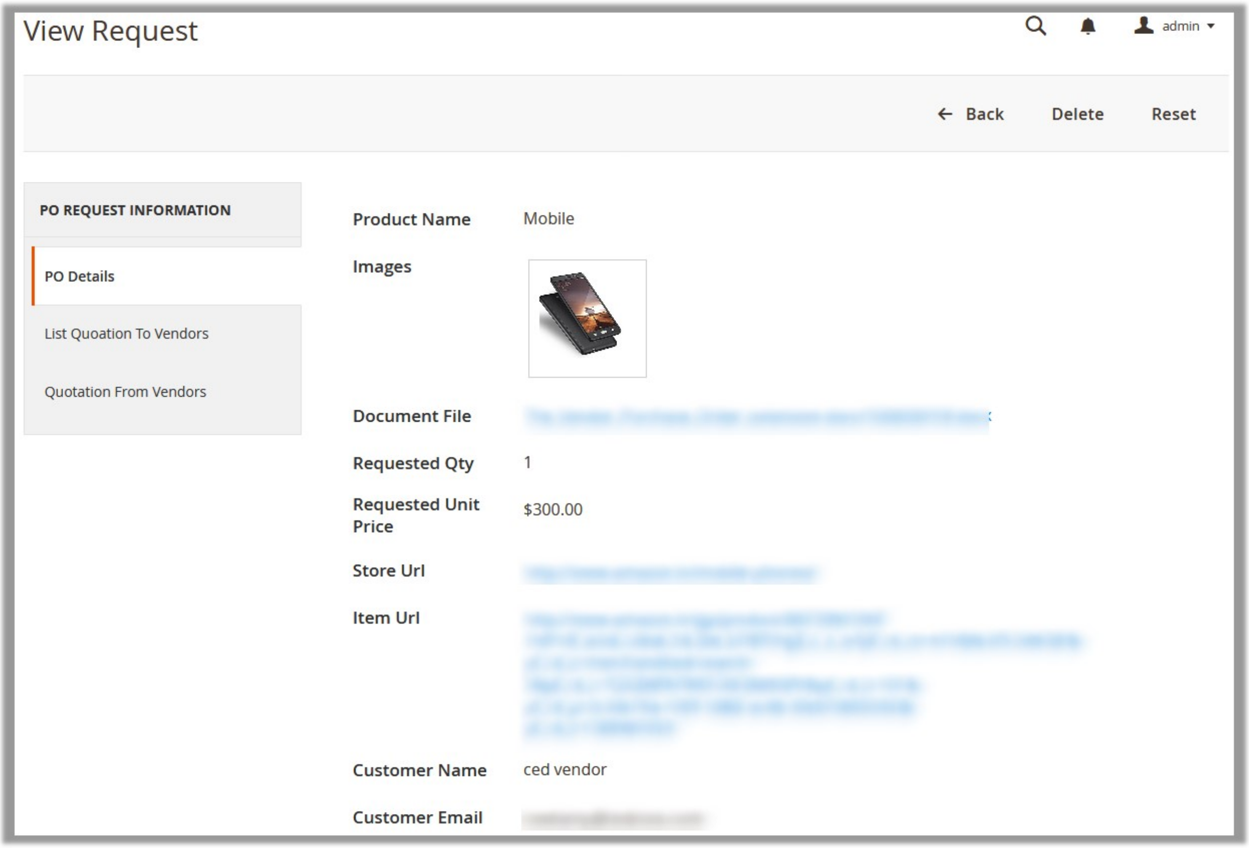
- View all the purchase order requests received from different front-end users.(http://docs.cedcommerce.com/magento-2/vendor-purchase-order-user-guide?section=view-the-purchase-order-request-sent-by-front-end-users)
- Bulk Action: Delete the purchase order request. Approve or Disapprove the purchase order request.(http://docs.cedcommerce.com/magento-2/vendor-purchase-order-user-guide?section=perform-bulk-action-on-purchase-order-requests)
- Send Quotation to Vendors(http://docs.cedcommerce.com/magento-2/vendor-purchase-order-user-guide?section=send-quotation-to-vendors)
- Assign Quotation to Vendors(http://docs.cedcommerce.com/magento-2/vendor-purchase-order-user-guide?section=assign-quotation-to-vendor)

4.1. View the Purchase Order Request Sent By Front-end Users

To view the Purchase Order Request

1. Go to the **Admin** panel.
2. On the left navigation bar, click the **PO REQUEST** menu.
   The **PO Request** page appears as shown in the following figure:

3. Scroll down to find the required product.
4. In the **Action** column, click the **Edit** link associated with the required product.
   The **View Request** page appears as shown in the following figure:



By default, the purchase order details appear on the page.

4.2. Perform Bulk Action on Purchase Order Requests

To delete the PO request with the bulk action

1. Go to the **Admin** panel.
2. On the left navigation bar, click the **PO REQUEST** menu.
   The **PO Request** page appears as shown in the following figure:

3. Scroll down to find the required products.
4. Select the associated checkboxes of the required products.

5. In the left-upper corner, click the **Actions** list.

6. Click **Delete**.
   A confirmation dialog box appears as shown in the following figure:

7. Click the **OK** button.

To Change the Status 0f the PO request with the bulk action

1. Go to the **Admin** panel.

2. On the left navigation bar, click the **PO REQUEST**
   The **PO Request** page appears as shown in the following figure:

3. Scroll down to find the required products.
4. Select the associated checkboxes of the required products.
5. In the left-upper corner, click the **Actions** list.
   A menu appears.

6. Click **Change Status**.
   The menu appears with the **Approve** and **Disapprove**
7. Click the required option.
   The status is changed accordingly.

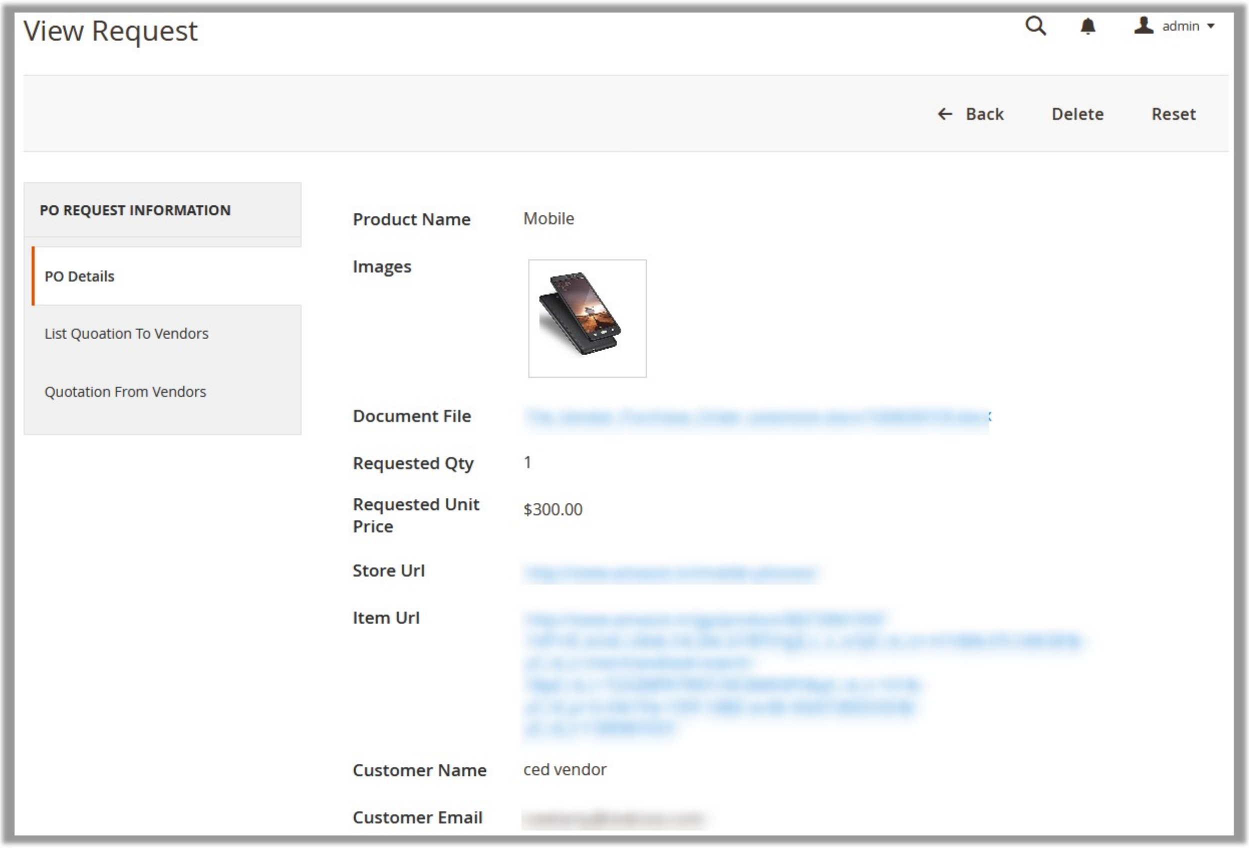
4.3. Send Quotation to Vendors

To send the quotation for Purchase Order Request to Vendors

1. Go to the **Admin** panel.
2. On the left navigation bar, click the **PO REQUEST** menu.

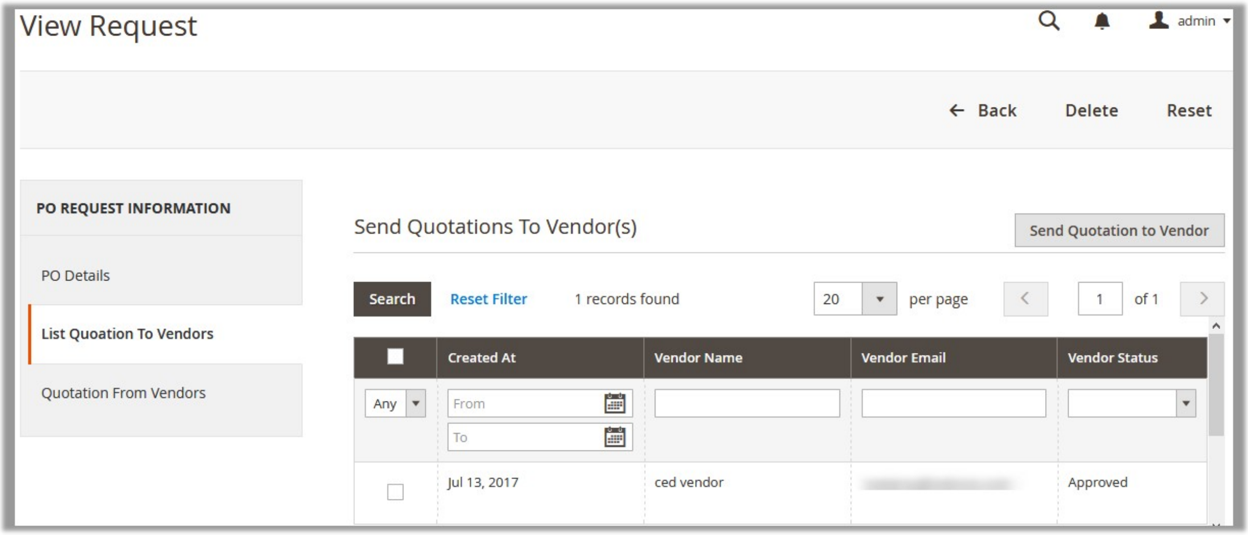
The **PO Request** page appears as shown in the following figure:

3. Scroll down to find the required product.
4. In the **Action** column, click the **Edit** link associated with the required product.
   The **View Request** page appears as shown in the following figure:



By default, the purchase order details appear on the page.

5. In the left navigation panel, click the **List Quotation To Vendors** menu.
   The page appears as shown in the following figure:



6. In the right panel, scroll down to the required vendors.
7. Select the check boxes associated with the required vendors, and then click the **Send Quotation to Vendor** button.
   A success message appears as shown in the following figure:

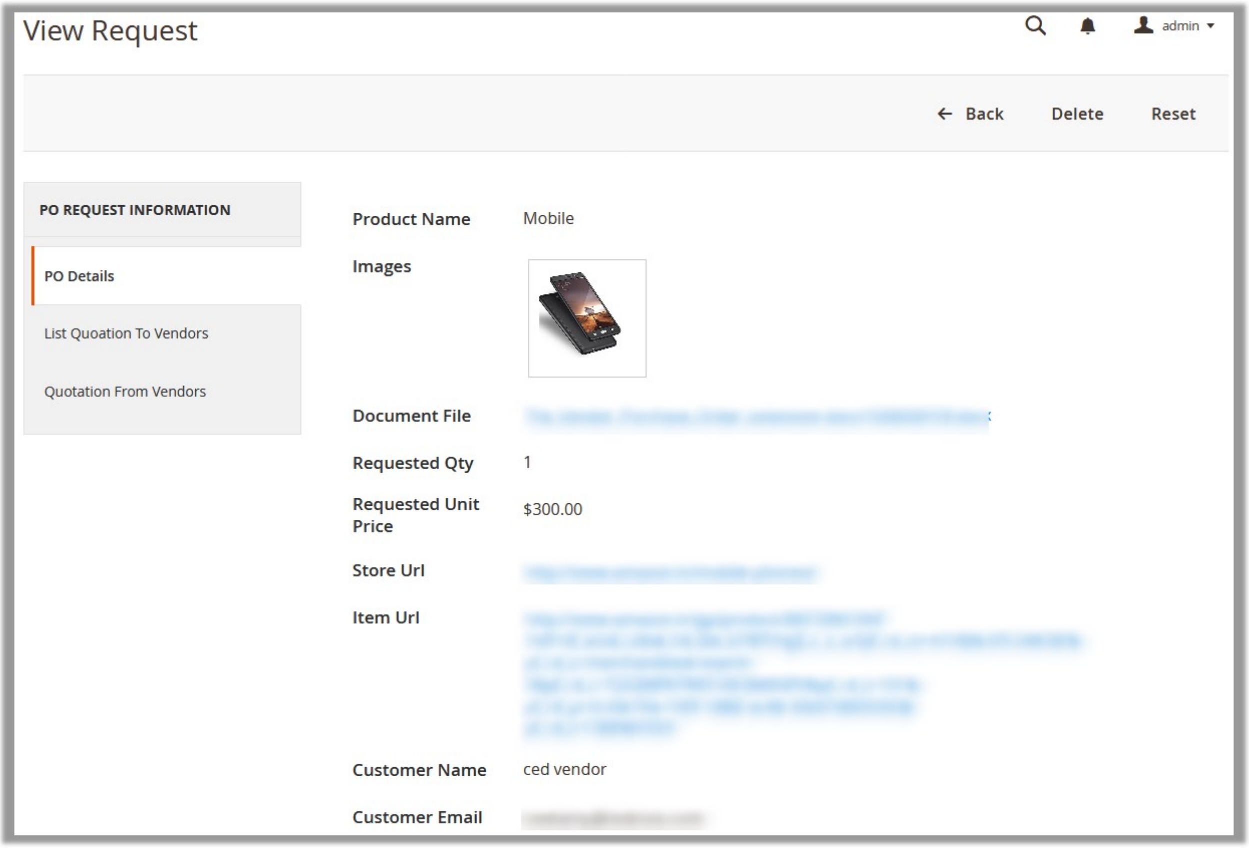
4.4. Assign Quotation to Vendor

After receiving the quotations from the vendors, admin can assign the quotation to any one of the selected vendors whose quotation is best suitable to the requirement.

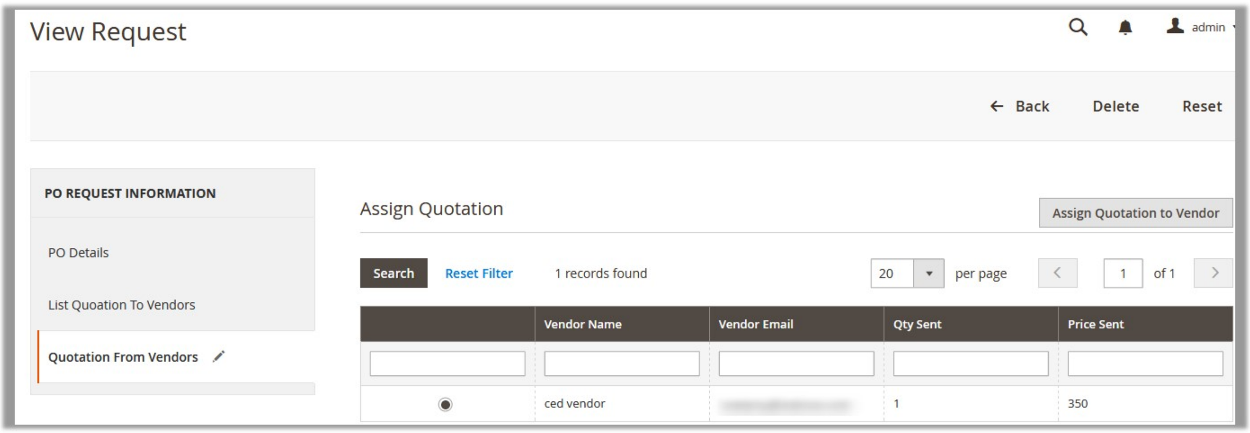
To assign the quotation to a vendor

1. Go to the **Admin** panel.
2. On the left navigation bar, click the **PO REQUEST** menu.
   The **PO Request** page appears as shown in the following figure:

3. Scroll down to find the required product.
4. In the **Action** column, click the **Edit** link associated with the required product.
   The **View Request** page appears as shown in the following figure:



   By default, the purchase order details appear on the page.
5. In the left navigation panel, click the **Quotation From Vendors** menu.
   The Assign Quotation page appears in the right panel as shown in the following figure:



   All the quotations received from the vendors are listed on this page.
6. In the right panel, scroll down to the required vendor.
7. Select the check box associated with the required vendor, and then click the **Assign Quotation to Vendor** button.

A success message appears as shown in the following figure:

5. Purchase Order Request on the Vendor Panel

Vendor can do the following tasks:

- Deal With Requested Quotation As a Vendor(http://docs.cedcommerce.com/magento-2/vendor-purchase-order-user-guide?section=deal-with-quotation-as-a-vendor)
: Send quotations to admin. Delete the quotations.
- Deal with Assined Quotation As a Vendor: (http://docs.cedcommerce.com/magento-2/vendor-purchase-order-user-guide?section=deal-with-assined-quotation-as-a-vendor)
View all the assigned quotations received from the admin. Edit the quotation and negotiate the price and quantity of the product with users. Send invoice to the users.
- Approve or Disapprove the quotations.(http://docs.cedcommerce.com/magento-2/vendor-purchase-order-user-guide?section=approve-po-request-vendor-panel)

- Download the invoice received from the users.(http://docs.cedcommerce.com/magento-2/vendor-purchase-order-user-guide?section=download-the-invoice-received-from-the-users)

5.1. Deal With Requested Quotation As a Vendor

Once the admin sends a quotations received from the front-end users to the vendors to send their quotations in return, it is listed on the Quotations List page of the Vendor panel.

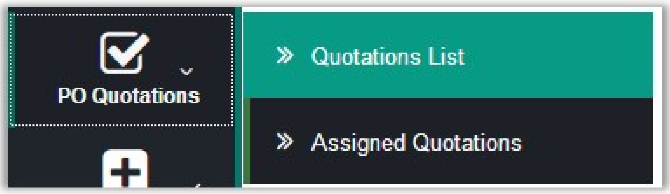
If the vendor wants to deal with this quotation, then the vendor can send the reqired quotation in return, or can delete the quotation sent by admin in case of non-interest.

Thus, a vendor can do the following tasks:

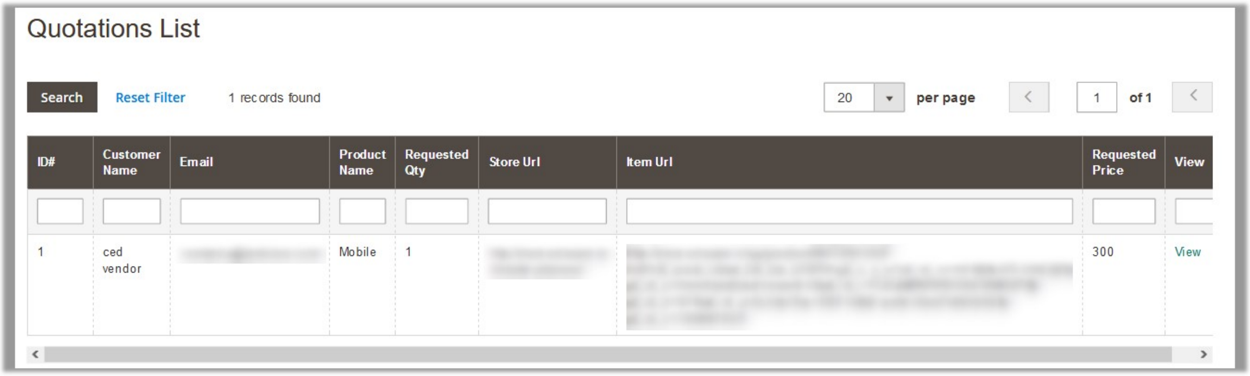
- Send Quotation to Admin
- Delete the Quotation

To send a quotation

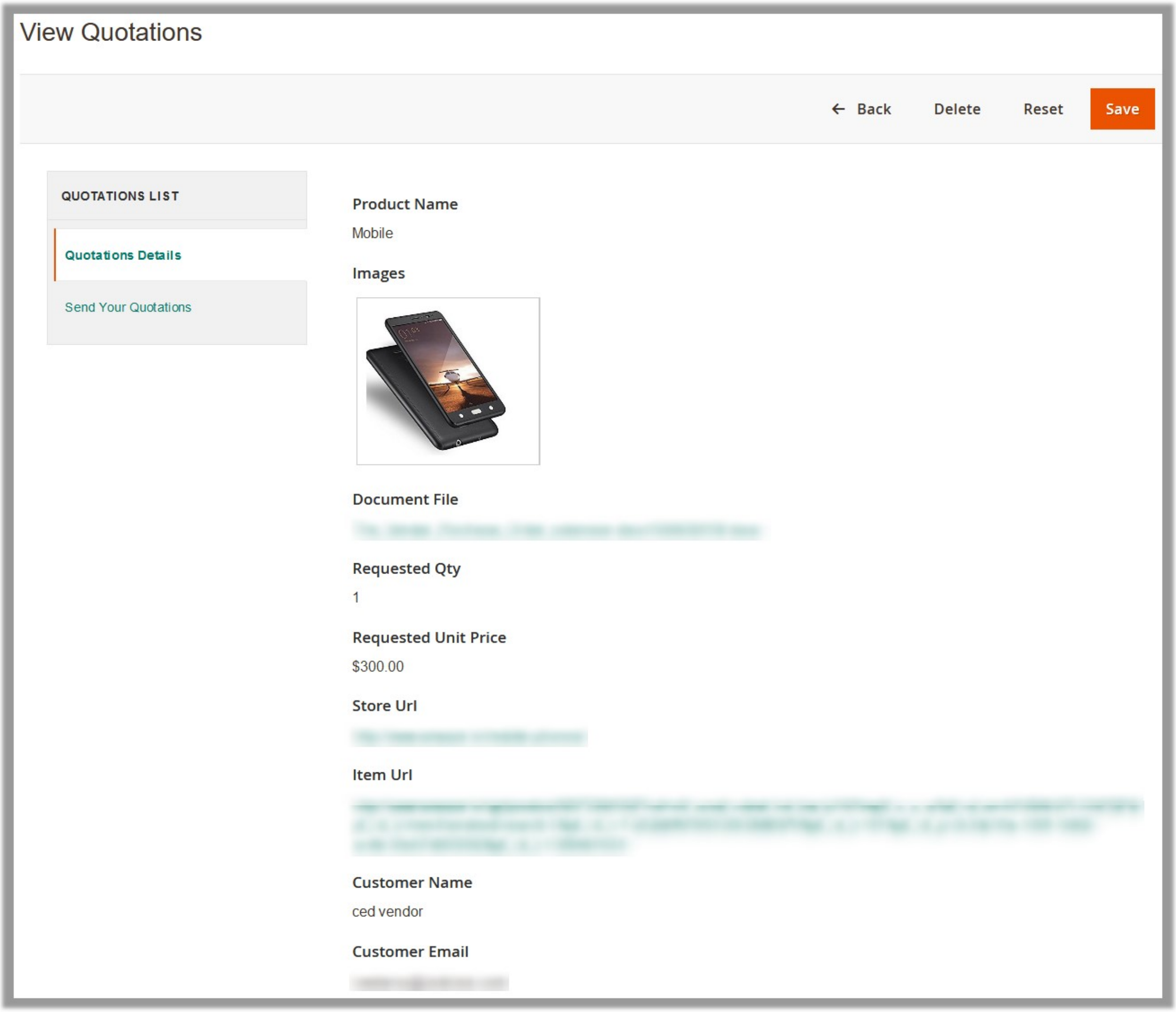
1. Access the Vendor account.
2. On the left navigation bar, click the **PO Quotations** menu.
The menu appears as shown in the following figure:



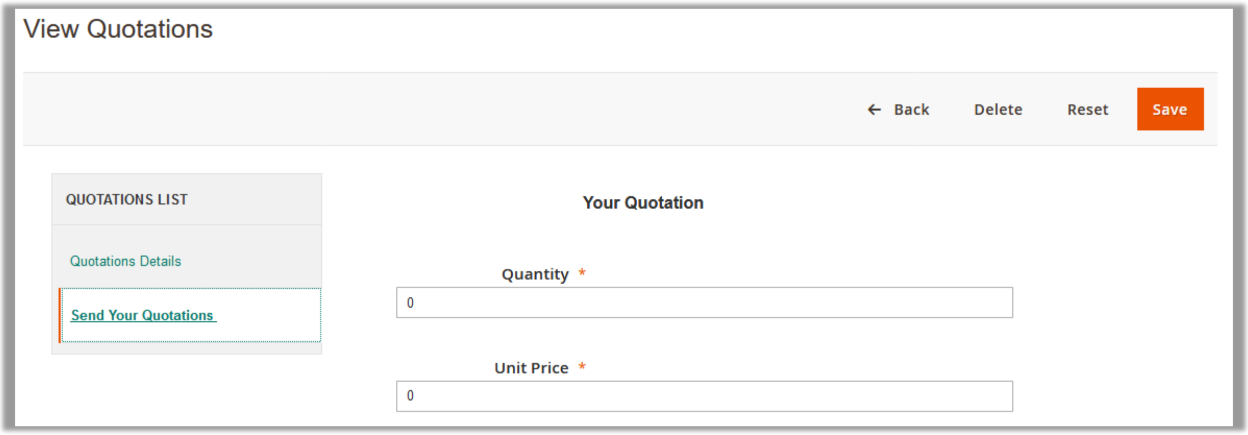
3. Click **Quotations List**.
   The **Quotations List** page appears as shown in the following figure:



   All the available quotations are listed on this page.
4. Scroll down to the required quotation.
5. In the **View** column of the required quotation, click the **View** link.
   The **View Quotations** page appears as shown in the following figure:



6. In the left navigation panel, click the **Send Your Quotations** menu.
   The page appears as shown in the following figure:



7. In the **Quantity** box, enter the required number of quantity that the vendor wants to send for quotation.
8. In the **Unit Price** box, enter the price per unit of the product.
9. Click the **Save** button.

To delete the quotation

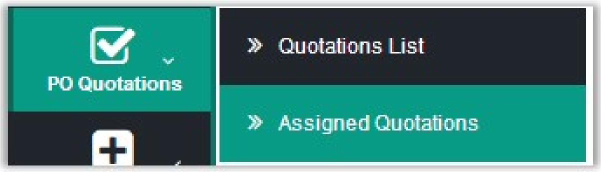
1. Open the **View Quotations** page of the required quotation.
2. On the top navigation bar, click the Delete button.
   A confirmation dialog appears.
3. Click the **OK** button.
   The quotation is deleted.

5.2. Deal with Assined Quotation As a Vendor

Once the admin assigns the quotation to the selected vendor, the vendor can create the invoice and send it to the customer directly for further negotiations to sell the product finally.

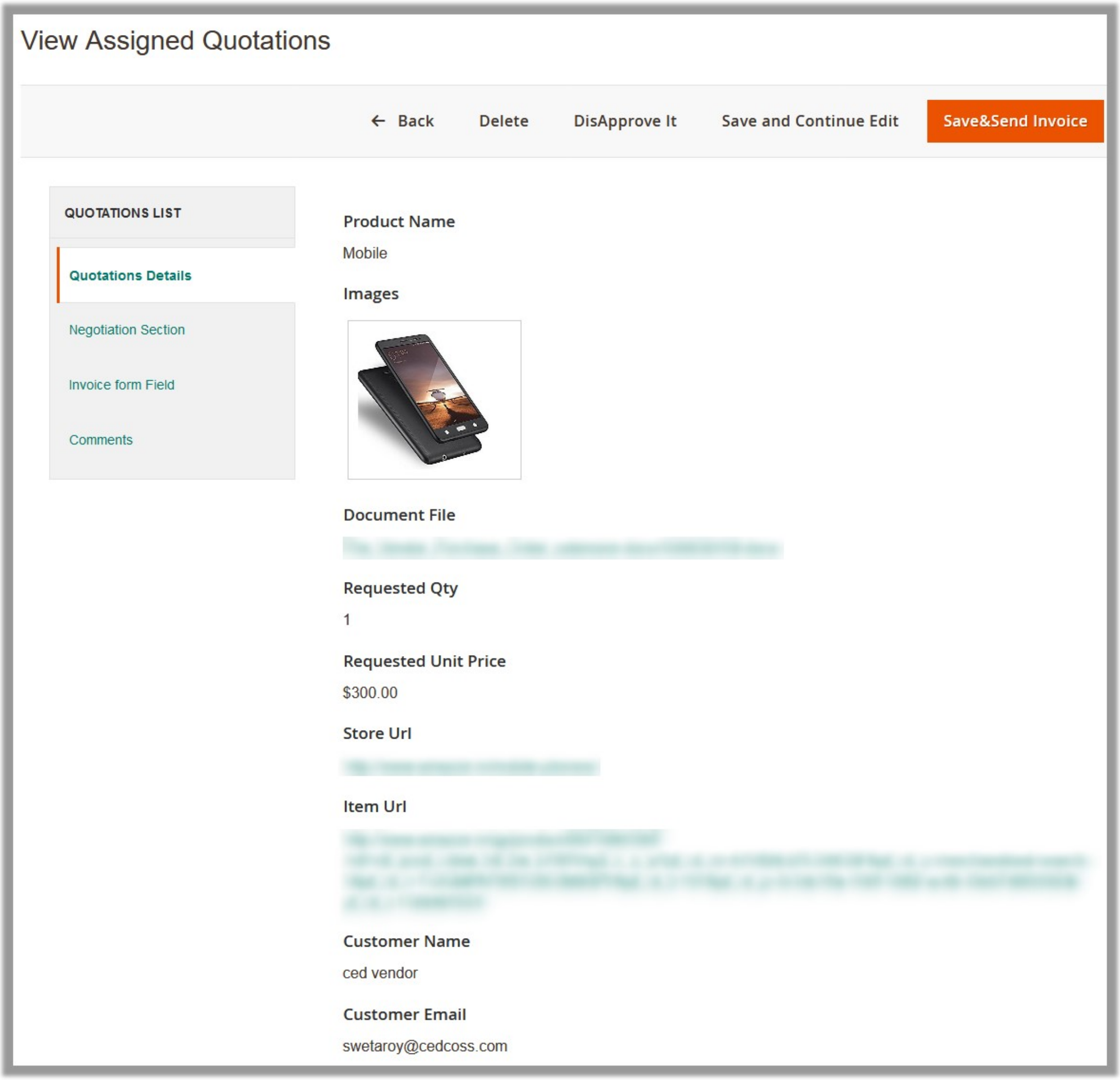
To view and edit the assigned quotation, and send the invoice

1. Access the Vendor account.
2. On the left navigation bar, click the **PO Quotations** menu.
   The menu appears as shown in the following figure:

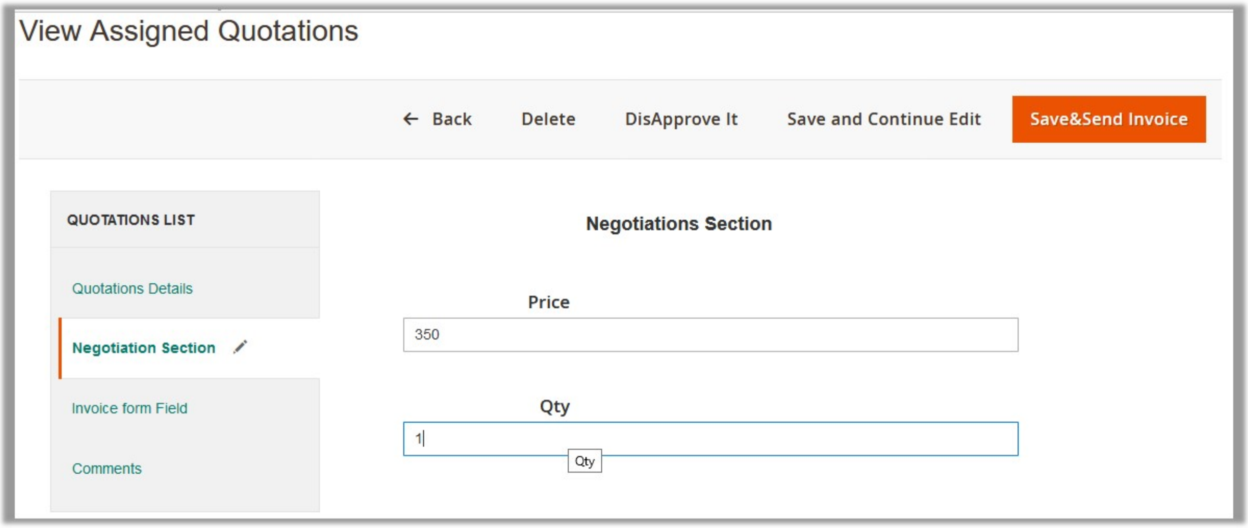


3. Click **Assigned Quotations**.
   The **Assigned Quotations** page appears as shown in the following figure:

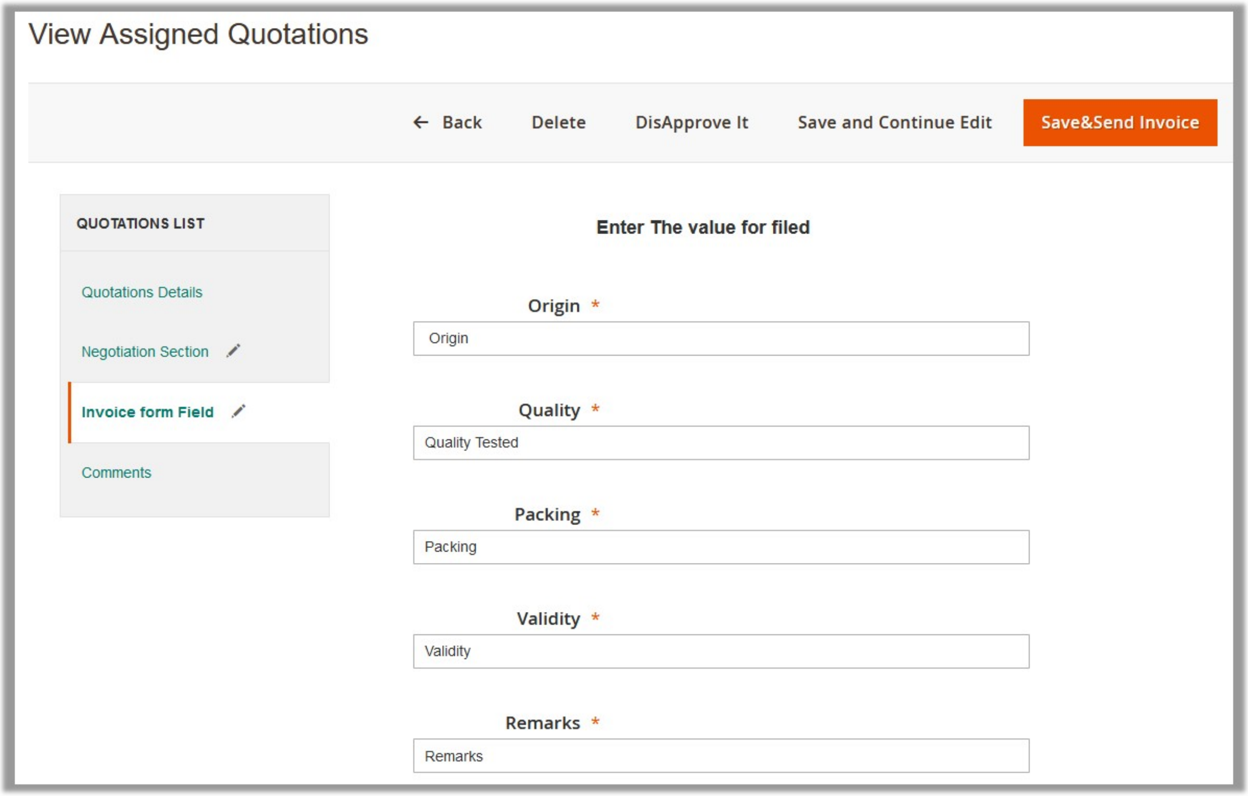
   All the assigned quotations are listed on this page.
4. Scroll down to the required quotation.
5. In the **View** column of the required quotation, click the **View** link.
   The **View Assigned Quotations** page appears as shown in the following figure:



6. In the left navigation panel, click the **Negotiation Section** menu.
   The page appears as shown in the following figure:

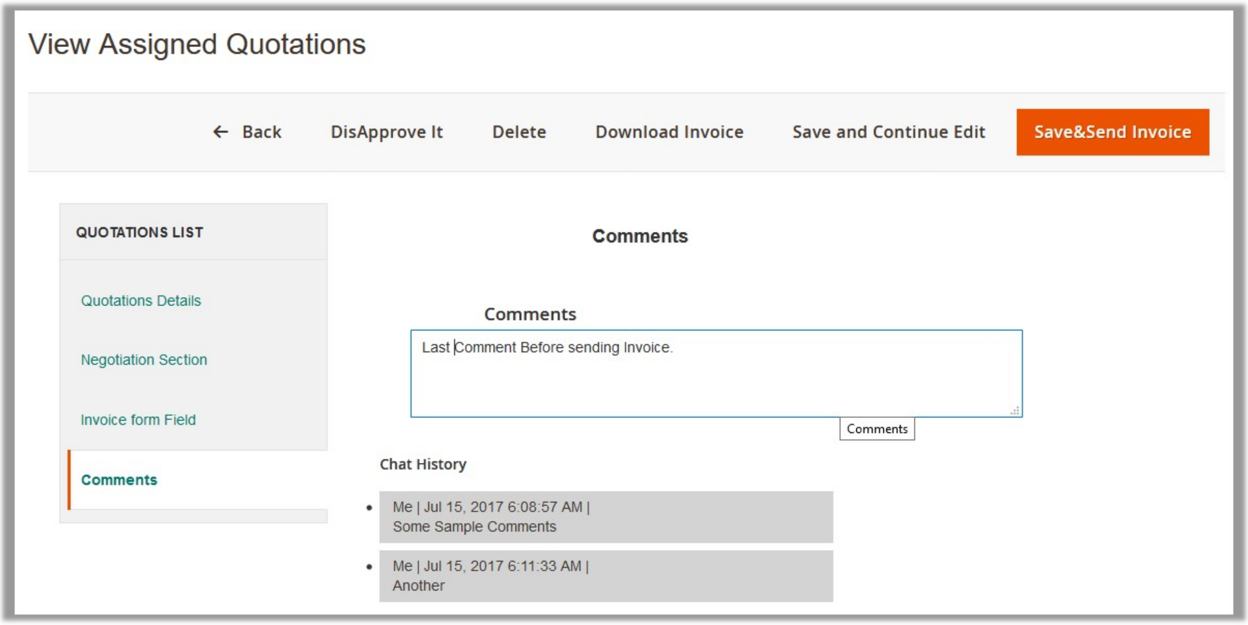


7. In the **Price** box, enter the price per unit of the product.
8. In the **Qty** box, enter the required number of quantity that the vendor wants to sell.
9. In the left navigation panel, click the **Invoice form Field** menu.
   The page appears as shown in the following figure:

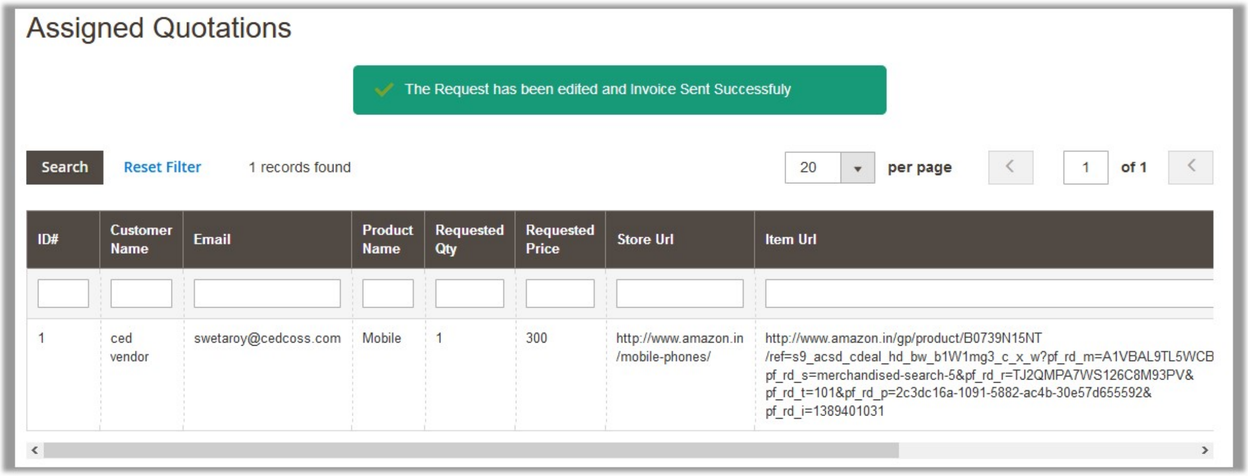


10. Enter the required values in the following fields:
    - **Origin**: Manufacturer or supplier of the product
    - **Quality**: Quality of the product as per the defined standard
    - **Packing**: Packing details of the product
    - **Validity**: Validity of the product
    - **Remarks**: A statement that mentions some information related to the product.

11. In the left navigation panel, click the **Comments** menu.
    The page appears as shown in the following figure:



12. On the top navigation bar, click the **Save&Send Invoice** button to save the information and send the invoice to the front-end user.
    Or
    Click the **Save and Continue Edit** button to send the invoice and continue the editing.
    The invoice is sent and the view is redirected to the **Asigned Quotations** page with a success message, which appears as shown in the following figure:

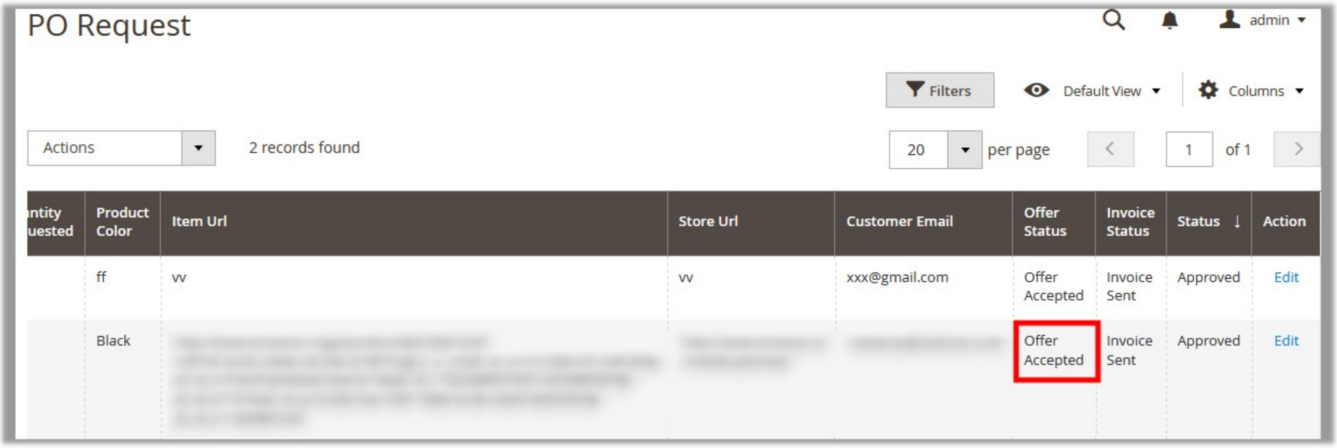


Notes:

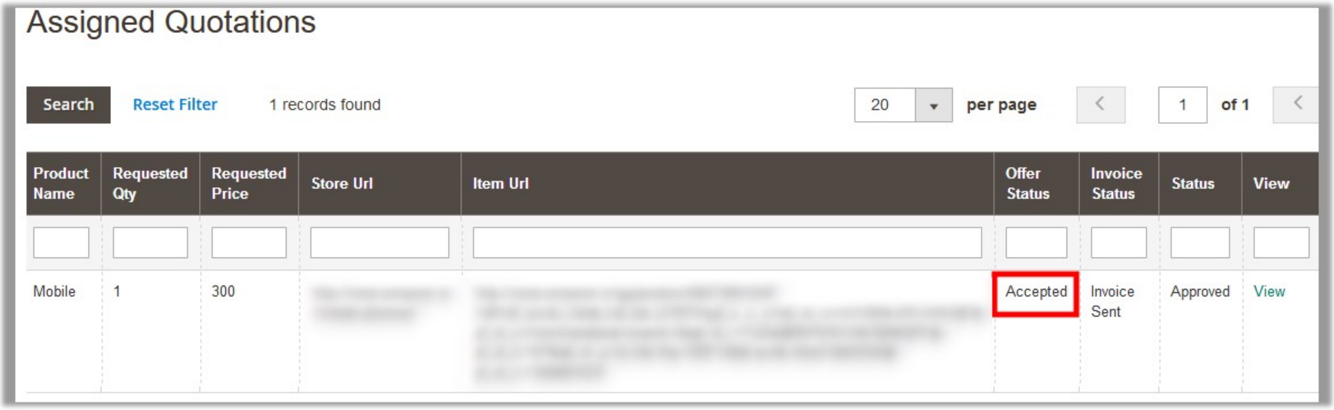
- To delete the assigned quotation: On the top navigation bar, click the **Delete** button.
- To disapprove the assigned quotation: On the top navigation bar, click the **Disapprove It** button.

5.3. Approve or Disapprove PO Request – Vendor Panel

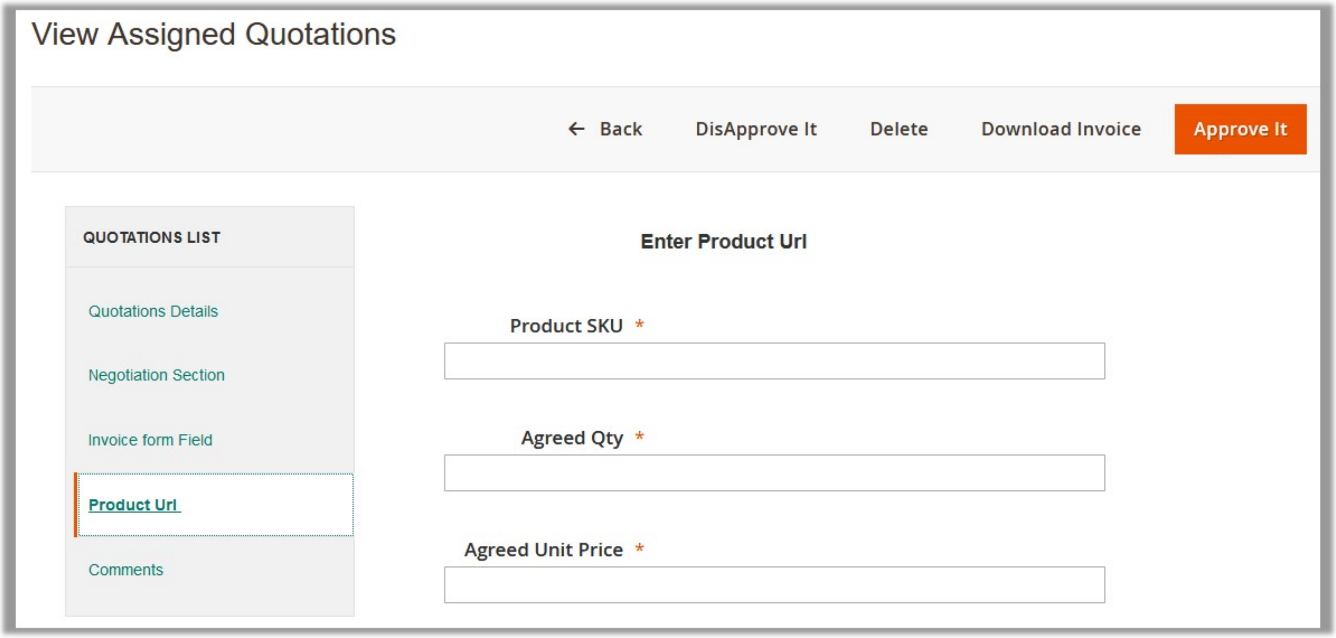
Once the user accepts the offer, the offer status is changed to **Offer Accepted** on the **PO Request** page.



Also, the offer status is changed to **Accepted** on the **Assigned Quotations** page.



The **Product Url** section is added on the **View Assigned Quotations** page. Also the **Approve It** button appears, which allows the vendor to approve the **PO request**.



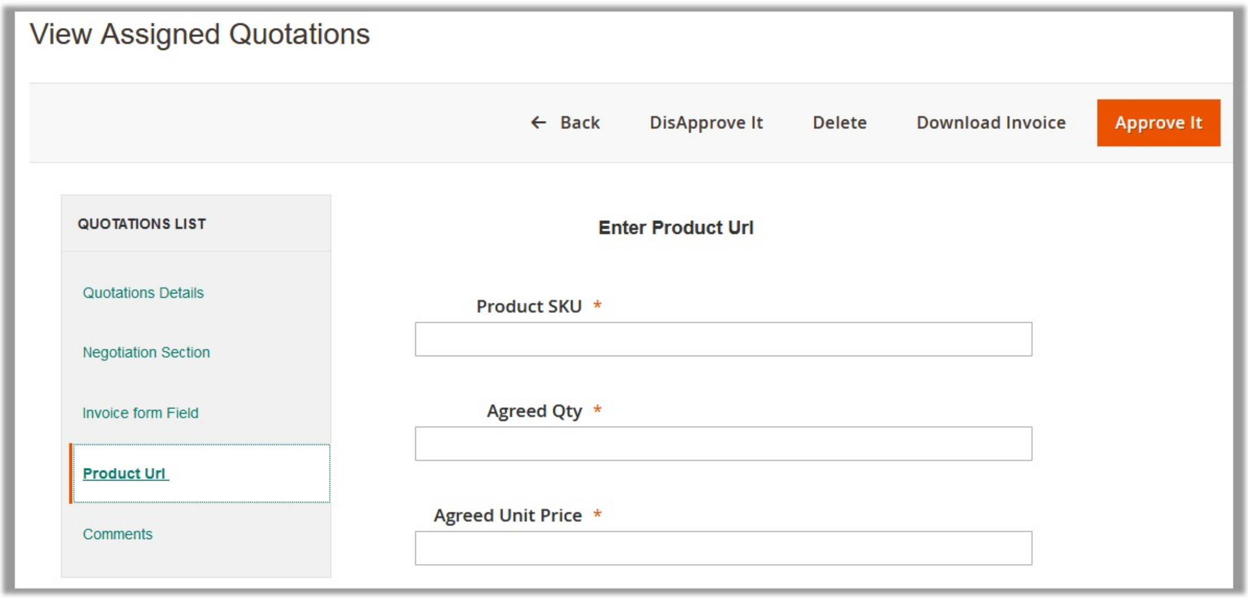
Vendor has to enter the details in the **Product Url** section to approve the PO request.

Note: to obtain **Product SKU,** the vendor can use the SKU of the similar product or in case of non-availability, the vendor has to create the similar product in the Magento store**.**

To Approve the PO Request

1. Go to the **Assigned Quotations** page.

2. Scroll down to find the required product.
3. In the **View** column, click the **View** link.
   The **View Assigned Quotations** page appears as shown in the following figure:



4. In the left navigation panel, click the **Product Url** menu.
   In the **Product SKU** box, enter **Product SKU** obtained from the similar product details available on the **Manage Product** page.
5. In the **Agreed Qty** box, enter the number of items admin wants to provide.
6. In the **Agreed Unit Price** box, enter the unit price of the item that the admin wants to offer.
7. In the upper-right corner of the top navigation bar, click the **Approve It** button.
   The invoice is sent again and provides the ability to the customer to add to cart.

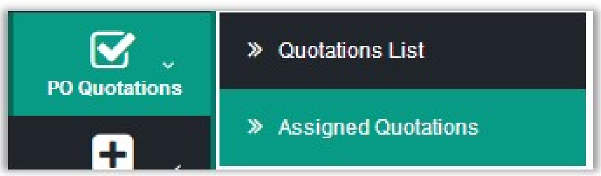
Note: To Disapprove the PO request, in the upper-right corner of the page, click the **DisApprove It**

5.4. Download the Invoice Received From the Users

Once the user accepts the offer and the offer status is changed to **Offer Accepted** on the **Assigned Quotations** page, the vendor receives an invoice from the users.

To download the Invoice received from the users

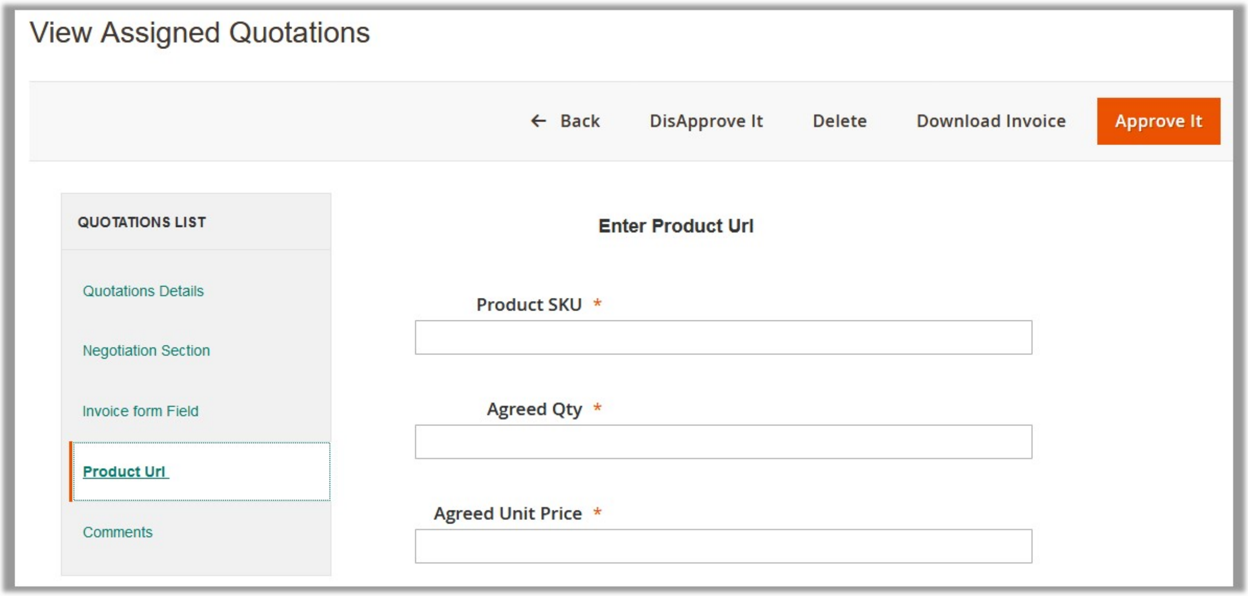
1. Access the Vendor account.
2. On the left navigation bar, click the **PO Quotations** menu.
   The menu appears as shown in the following figure:



3. Click **Assigned Quotations**.
   The **Assigned Quotations** page appears as shown in the following figure:

All the assigned quotations are listed on this page.

4. Scroll down to the required quotation.
5. In the **View** column of the required quotation, click the **View** link.
   The **View Assigned Quotations** page appears as shown in the following figure:



6. On the top navigation bar, click the **Download Invoice** button.
   A pdf of the the downloaded invoice appears.