

LC Purchase Steps

Module Guide: LC Purchase Steps

Module Location

Settings > Purchase > LC Purchase Steps

Module Purpose

The **LC Purchase Steps** module is used to define and standardize the stages (milestones) that must be passed in a purchasing process that uses a **Letter of Credit (LC)**. The goal is to create a structured and trackable workflow for import purchases, from the issuance of the LC and shipping to the settlement of documents.

1. Main View (LC Purchase Steps List)

The main page displays all the configured stages of the LC purchasing process.

View Explanation

- **Search Filter:** Allows for a quick search based on the **Purchase Stage Code**.
- **List Table:**
 - **No.:** Serial number.
 - **Purchase Stage Code:** A unique code for each step (e.g., `PS24`, `PS23`).

- **Purchase Stage Name:** A descriptive name of the process step (e.g., Dokumen Bila Cula, Angka Pengenal Impor).
- **Order:** A number that determines the position of this step in the overall LC purchasing process flow.
- **Action Buttons:**
 - **Add Purchase Stage:** Opens the form to create a new process step.
 - **Delete:** Deletes the selected step.

2. Add Purchase Stage Page

This form is used to add a new step to the LC purchasing workflow.

View Explanation

- **Purchase Stage Code:** A field to enter a unique code (required).
- **Purchase Stage Name:** A field to enter the name of the process step (required).
- **Order:** A dropdown selection to determine the order of this step in the workflow.
- **Buttons:**
 - **Save:** To save the new purchase step data.

- **Cancel:** To cancel the process.

3. Steps to Add a New Purchase Stage

1. From the main page, click the **Add Purchase Stage** button.
2. Fill in the **Purchase Stage Code** and **Purchase Stage Name** .
3. Select the appropriate **Order** to determine its position in the process.
4. Click the **Save** button.

4. Integrated Workflow & Business Process

- **Framework for Import Purchasing Process:** The steps defined here will become the reference framework for the LC Purchase Transaction module. Every Purchase Order that uses an LC will follow and have its status updated according to these stages.
- **Tracking and Monitoring:** The purchasing team can track which stage each import PO has reached. This provides clear visibility into the progress of shipments and document fulfillment.
- **Document Management:** Each stage can be associated with documents that must be fulfilled, for example, "Issuance of Bill of Lading" or "Approval of Import Documents."

- **Basis for Reporting:** Allows management to view reports on the duration of each stage, identify potential bottlenecks, and measure the efficiency of the import purchasing process.

5. Tips & Important Notes

- Define stages that accurately reflect the actual LC purchasing process in your company, from negotiation, opening the LC, and shipping, to the goods being received.
- **Order** is a crucial field because it determines a logical and sequential workflow. Ensure it is set up correctly.
- Use a clear and easily understandable **Purchase Stage Code** and **Name** for the purchasing and finance teams involved in the LC process.

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