Brainstorming with steve on partially receiving PO line items.

5/2/25

Notes from Cory about the project - project for cory and awh. chaining po's (orders and backorders) - get specific from cory - we may need a planning session. be able to partially receive PO line items. Other ones will continue on in a new PO that is chained together (flex grid). also, different subject, the flex attributes (different than flex grid) may need to cascade along with the duplication (or partial duplication) process. awh - a paying client. they need visibility. extras - maybe even tracking vendor credits. open up external\_alternate\_id's for each of the main pieces.

* Live po’s – they go straight in
* Request po’s – they are just an order – can I get some stuff – doesn’t touch payables
* What about a transition po – part good and part still missing
  + We need to know that is ordered
  + Have there been any payments
  + We could name the po type to whatever, just like invoices – this would be a new PO type that gets special handling
* Request po can be flipped to a live po
* If there is a partial receiving of the items or a pre-payment, we flip it to a transitional po
* Chaining – from one po to another – flex grid tie-ins
* Scenarios… a. I got everything, b. I only got part of this, c. I have to pre-pay, d. we need to do some chaining, e. if I still need more (things are on backorder)
* Vendor credits – bsi stuff – assets (the vendor credit) and the inventory levels (other type of asset).
* If the po is pre-paid, bank goes down, inventory stays the same, asset as a vendor credit, we need a date range (how long in transition)
* Treat it like the scenario = (ideal everything is in line) vs () flex bubble =()=()=() ect.
* Be able to drill down to use or see the vendor credits – maybe use special accounts
* Try to automate how a person could pay, if there are some vendor credits
* Known needs for both vendor credits (po and e/r side) and in-store credit (customer and invoice side).
* On the dates for transitional PO’s, we may need something similar to the transition\_invoices with start and end dates and a finished flag.
* When the inventory arrives, we need to enforce that things get flipped over to live.
* Tracking those backorders – what is due, quantities, payments, mix of both.
* As we were talking… we were thinking about possible subs or one-to-many off of the po/inv line item. Show what came in, and where it is at, maybe help them do some math as to what is still owed or wanted.
* Steve also mentioned in-line discounts – aka started with this number and then it went down to this number
* Question, what about existing backorders, say 50x on po 35, another 50x on po 37, how do I know what was totally wanted for part x.
* We are just dealing with the current po, not going back in time and looking at other older request po’s.
* Ask them questions… full receive or partially receive, full payment, partial payment, pre-payment
* Make a request po (first step). If we got everything, flip it to live. If we have either a pre-payment or a partial receiving, we flip it transitional po type, start the chain, create new baby live po’s
* On the new baby po’s – stamp both the request qty and the real qty to the new values received. Update the old po and show what it was and what it still is or needs to be. We need the total request quantities to match… totals.
* Steve was talking about ai stuff and how to help feed ai information and then get recommendations and forecasting options. He was showing me some things about working with Grok and what it could do. Helping to do data analysis.
* We may need to lock things down, if they choose the transitional route. We don’t want it to go back to a request or whatever other rules. There could be payments or inventory stuff.
* Going back to invoice backorders… talking about predictiveness of what is being ordered, wanted, and really available. There may be some ai needs there.
* Small talks about a reverse shopping cart to help with orders or new po’s for specific vendors. What if we added some predictiveness to that model? Trying to help them out where possible. Have the system tell them what is going on.
* Talking about data storage and using some memory or mapping steps before actually committing things to the database.
* Looking at suggestive automation options – prompts for action but helps get things started
* Lots of cause and effect type relationships. Make sure we have a valid plan.
* Side note, more talk about ai, marketing, personal assistants, and where things are going. Using ai to help you analyze the data and help you make decisions.
* The LLM’s (large language model) are getting huge.
* We have been building a tactile (physical) environment and everything new is going mobile (smaller and more)