Agentic Bounty Challenge Submission:
Purchase Order Creation Agent

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1. Overview

Agent Name: PO Creation Agent
Domain: Procurement / Finance Automation

The PO Creation Agent is an **AI-driven autonomous solution** designed to streamline procurement and finance operations. It autonomously extracts purchase inputs, validates critical details, and creates Purchase Orders in the ERP system via secure API calls. This agent demonstrates seamless integration of AI reasoning with enterprise automation to accelerate PO creation, improve compliance, and enhance operational efficiency.

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2. Problem Statement

Organizations relying on manual or semi-automated purchase order processes face **operational inefficiencies**, including:

- Delayed procurement cycles

- Data entry errors and inconsistencies

- Missed approval thresholds and compliance risks

- Financial exposure, audit challenges, and budget overruns

These issues limit scalability, reduce transparency, and hinder timely decision-making across procurement and finance teams.

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3. Solution Summary

The agent **transforms PO creation and approval** by automating the end-to-end process:

- Extracts and validates purchase request details

- Enforces approval policies dynamically

- Integrates directly with ERP systems via secure APIs

- Sends automated notifications and maintains audit-ready logs

Key benefits: Reduced manual effort, faster procurement cycles, enhanced compliance, and improved operational transparency.

4. Prerequisites

- Automation 360 installed and running

- Bot Agent installed and connected

- AI Skill deployed and linked via Model Connection

- **Configuration Updates (Master_Config.xlsx under Bot Store\PoCreation_Agent\ folder):**

    - Notification Email IDs for PO status and approvals

    - Server/Application URL (target ERP)

    - PO Creation API endpoint

5. Input Requirements

For accurate PO creation, the agent extracts required details from the **email body**. Emails must contain complete and structured information.

Header-Level Fields

- Supplier

- Transaction Date

- Schedule Date

- Currency

- Buying Price List

- Document Status (DocStatus)

- Supplier Address

- Shipping Address

- Terms and Conditions

- Remarks

Item-Level Fields (per line item)

- Item Code

- Item Name

- Quantity (Qty)

- Unit of Measure (UOM)

- Stock UOM

- Rate / Unit Price

- Schedule Date

Providing complete details ensures automatic validation, processing, and PO creation, minimizing errors and compliance risks.

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6. System Requirements

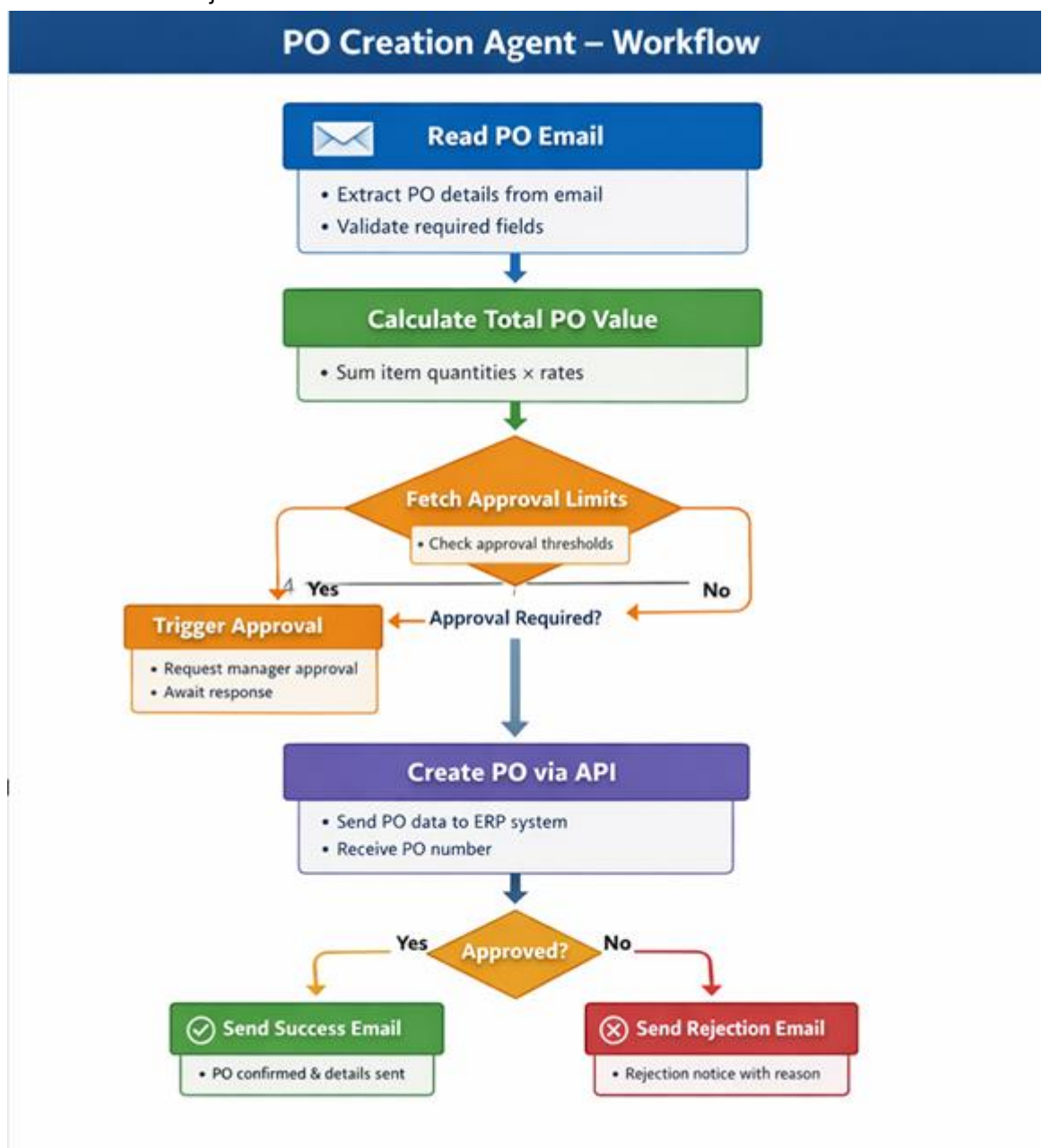| Component	Minimum Requirement
Processor	Intel Core i5 (11th Gen or higher)
RAM	8 GB+
Storage	500 GB disk space
Network	1 GbE, IPv4/IPv6 compatible
OS	Windows 10 or 11

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7. Agentic Capabilities

- Autonomous decision-making

- Conditional orchestration

- Human-in-the-loop governance

- End-to-end process ownership

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8. Tools Used

- **PO_Creation_Email_read** (Task Bot)

- **Config_Reader** (Task Bot)

- **Validation_Form** (Human-in-the-loop Form)

- **PoCreation_API** (Automation Cloud Service – API Task)

- **PO_Creation_Send_Email** (Task Bot)

9. Process Flow

1. Read PO Email

2. Calculate Total PO Value

3. Fetch Approval Limits

4. Trigger Approval if Required

5. Create PO via ERP API

6. Send Success or Rejection Email

PO Creation Agent – Workflow

10. Business Impact

- 60–70% reduction in PO processing time

- Zero unauthorized PO creation

- Improved compliance and auditability

11. Conclusion

The PO Creation Agent demonstrates **true Agentic Process Automation** by combining autonomous decision-making, AI reasoning, and human collaboration to deliver measurable business outcomes, including faster procurement, reduced risk, and operational efficiency.