SiteProc Supplier Guide

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Getting Started

Welcome to SiteProc! This guide will help you understand how to use the platform as a supplier to efficiently manage orders from construction companies.

What You Can Do

- ☑ Receive and view purchase orders
- ☑ Update order and delivery status in real-time
- ☑ Upload proof of delivery documents
- ☑ Manage your company profile
- ☑ Communicate with project managers
- ☑ Track payment status

Account Setup

First Time Login

1. **Check Your Email**

   - You'll receive an invitation email from the construction company
   - Click the "Accept Invitation" link
   - If you don't see it, check your spam folder

2. **Create Your Password**

   - Enter a strong password (minimum 8 characters)
   - Include uppercase, lowercase, numbers, and symbols

- Click "Create Account"

3. **Verify Your Email**

   - Check for verification email
   - Click the verification link
   - You're now ready to use SiteProc!

Two-Factor Authentication (Recommended)

1. Go to **Settings → Security**
2. Click **Enable 2FA**
3. Scan QR code with authenticator app (Google Authenticator, Authy, etc.)
4. Enter verification code
5. Save backup codes in a secure location

Receiving Orders

How Orders Arrive

Orders automatically appear in your dashboard when a construction company sends them to you.

Viewing New Orders

1. **Navigate to Dashboard**

   - Log in to SiteProc
   - You'll see new orders highlighted with a "NEW" badge
   - Red notification dot shows unread orders

2. **Order Notification**

   - Receive instant email notification
   - Push notification (if enabled on mobile)
   - In-app notification badge

3. **Order Details Include:**

   - Order number and date
   - Project name and location
   - Items requested (description, quantity, unit price)
   - Delivery address
   - Requested delivery date
   - Special instructions
   - Contact person
   - Total order value

Acknowledging Orders

Important: Always acknowledge receipt within 24 hours

1. Open the order
2. Click **"Acknowledge Order"** button
3. Confirm availability and estimated delivery date
4. Add any notes or concerns
5. Click **"Submit Acknowledgment"**

The construction company will receive instant notification of your acknowledgment.

Managing Orders

Order Dashboard

Your main dashboard shows:

- **Pending Acknowledgment** - Orders awaiting your response
- **In Progress** - Orders being prepared
- **Out for Delivery** - Orders currently being delivered
- **Delivered** - Completed orders
- **Cancelled** - Cancelled orders

Filtering Orders

Use filters to find specific orders:

- By date range
- By project
- By status
- By company
- By order value

Search Function

Quick search by:

- Order number
- Project name
- Item description
- Purchase order reference

Updating Delivery Status

Keep customers informed with real-time status updates.

Status Options

1. **Order Acknowledged**

   - Confirms you received the order
   - Provide estimated preparation time

2. **Preparing Order**

   - Items are being gathered/manufactured
   - Update if there are any delays

3. **Ready for Delivery**

   - Order is prepared and ready to ship
   - Provide delivery date/time

4. **Out for Delivery**

   - Order is in transit
   - Include driver name and vehicle details
   - Estimated arrival time

5. **Delivered**

   - Order has been delivered
   - Upload proof of delivery (required)

How to Update Status

1. Open the order from your dashboard
2. Click **"Update Status"** button
3. Select new status from dropdown
4. Add notes (optional but recommended)
5. For delivery, add:
   - Driver name
   - Vehicle registration
   - Estimated arrival time
   - Tracking number (if applicable)
6. Click **"Update"**

Customers receive instant notifications of status changes.

Uploading Proof of Delivery

Critical Step: Always upload proof of delivery to close orders and ensure payment.

Required Documents

At minimum, upload one of:

- ☑ Signed delivery note
- ☑ Photo of delivered items at site
- ☑ Digital signature from recipient
- ☑ Delivery receipt

How to Upload

1. **Open Delivered Order**

   - Navigate to the order
   - Ensure status is "Delivered"

2. **Click "Upload POD"**

   - Find the upload section
   - Click "Choose Files" or drag-and-drop

3. **Select Files**

   - Supported formats: PDF, JPG, PNG
   - Maximum size: 10MB per file
   - You can upload multiple files

4. **Add Details**

   - Recipient name
   - Date and time of delivery
   - Any notes or issues

5. **Submit**

   - Click "Upload Proof of Delivery"
   - Wait for confirmation message

Best Practices for POD

☑ Do's:

- Take clear, well-lit photos
- Ensure documents are fully visible
- Include signature if possible
- Upload within 24 hours of delivery
- Include photos of any damage

✗ Don'ts:

- Blurry or dark photos
- Partial documents
- Unrelated files
- Wait more than 48 hours to upload

Managing Your Profile

Company Information

Keep your profile updated for smooth operations:

1. **Navigate to Settings**

- Click your avatar (top right)
- Select "Company Profile"

2. **Update Details**

- Company name
- Business registration number
- Tax ID / VAT number
- Primary contact person
- Email address
- Phone number
- Physical address
- Business hours

3. **Add Logo**

- Upload company logo (PNG, JPG)
- Recommended size: 500x500px
- Maximum size: 2MB

4. **Payment Information**

- Bank account details
- Payment terms
- Invoice email

5. **Save Changes**

Team Members

Add team members who need access:

1. Go to **Team** section
2. Click **"Add Member"**
3. Enter:
    - Name
    - Email
    - Role (Admin, Manager, Viewer)
4. Send invitation
5. They'll receive email to join

Roles & Permissions

- **Admin** - Full access, can add/remove users
- **Manager** - Can manage orders, update status, upload POD
- **Viewer** - Read-only access to orders

Notifications

Email Notifications

You'll receive emails for:

- New orders received
- Order modifications
- Delivery date reminders
- Payment confirmations
- System updates

Push Notifications

Enable push notifications for:

- Urgent order updates
- Delivery reminders
- Customer messages

Customizing Notifications

1. Go to **Settings → Notifications**
2. Toggle on/off for each type:
    - New orders (recommended: ON)
    - Status updates (recommended: ON)
    - Messages (recommended: ON)
    - Marketing emails (optional)
3. Choose delivery method:
    - Email
    - SMS (if available)
    - Push notification

Best Practices

Response Time

⏱ **24-Hour Rule**

- Acknowledge orders within 24 hours
- Update status at each stage
- Respond to messages within business day

Communication

💬 **Be Proactive**

- Notify customers of any delays immediately
- Provide realistic delivery estimates
- Keep notes detailed and professional

Documentation

📝 **Keep Records**

- Always upload proof of delivery
- Take photos of items before shipping
- Document any issues or discrepancies
- Keep copies of delivery notes

Quality Control

☑ **Before Delivery**

- Verify order quantities
- Check item descriptions match
- Inspect for damage
- Include packing list

Troubleshooting

Common Issues

"I can't access my account"

Solution:

1. Click "Forgot Password" on login page
2. Enter your email
3. Check email for reset link (check spam)
4. Create new password
5. If still having issues, contact support

"Order not showing in dashboard"

Solution:

1. Refresh the page (F5)
2. Check filter settings
3. Search by order number
4. Contact the company if still not visible

"Can't upload proof of delivery"

Solution:

1. Check file size (must be under 10MB)
2. Verify file format (PDF, JPG, PNG only)
3. Try different browser
4. Clear browser cache
5. Contact support if issue persists

"Status update not saving"

Solution:

1. Ensure stable internet connection
2. Don't click "Update" multiple times
3. Try refreshing and updating again
4. Check if there are required fields
5. Contact support if problem continues

"Not receiving notifications"

Solution:

1. Check email spam folder
2. Verify email address in profile
3. Check notification settings
4. Ensure email isn't blocked
5. Add no-reply@siteproc.com to contacts

Need Help?

Support Channels

✉ **Email Support** support@siteproc.com Response time: Within 24 hours

📞 **Phone Support** (Business Hours) Available Monday-Friday, 8 AM - 6 PM

💬 **Live Chat** Available in-app during business hours

📖 **Knowledge Base** Visit docs.siteproc.com for tutorials and FAQs

Emergency Support

For urgent delivery issues outside business hours:

- Use in-app urgent message feature
- Mark message as "URGENT"
- Emergency hotline: [Contact your account manager]

Appendix

Keyboard Shortcuts

- `Ctrl + K` - Quick search
- `Ctrl + N` - View notifications
- `Ctrl + ,` - Open settings
- `Esc` - Close modals

Status Definitions

Status	Meaning
Pending	Order received, awaiting acknowledgment
Acknowledged	You've confirmed receipt
Preparing	Items being prepared for delivery
Ready	Order ready for pickup/delivery
In Transit	Currently being delivered
Delivered	Arrived at destination
Completed	POD uploaded, order closed
Cancelled	Order cancelled by customer

Document Requirements

Document Type	Format	Max Size
Proof of Delivery	PDF, JPG, PNG	10MB
Company Logo	PNG, JPG	2MB
Invoice	PDF	5MB
Packing List	PDF	5MB

For the latest version of this guide, visit: https://docs.siteproc.com/supplier-guide