User Manual

PROCION SYSTEM ONLINE

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Procurement Section

Procurement Request:

Create Procurement Request:

Step 1 Navigate to Procurement Request screen:

Navigate to the Procurement Request Screen by clicking on the "Procurement" button on the top navbar or on the "Procurement" button on the home screen:
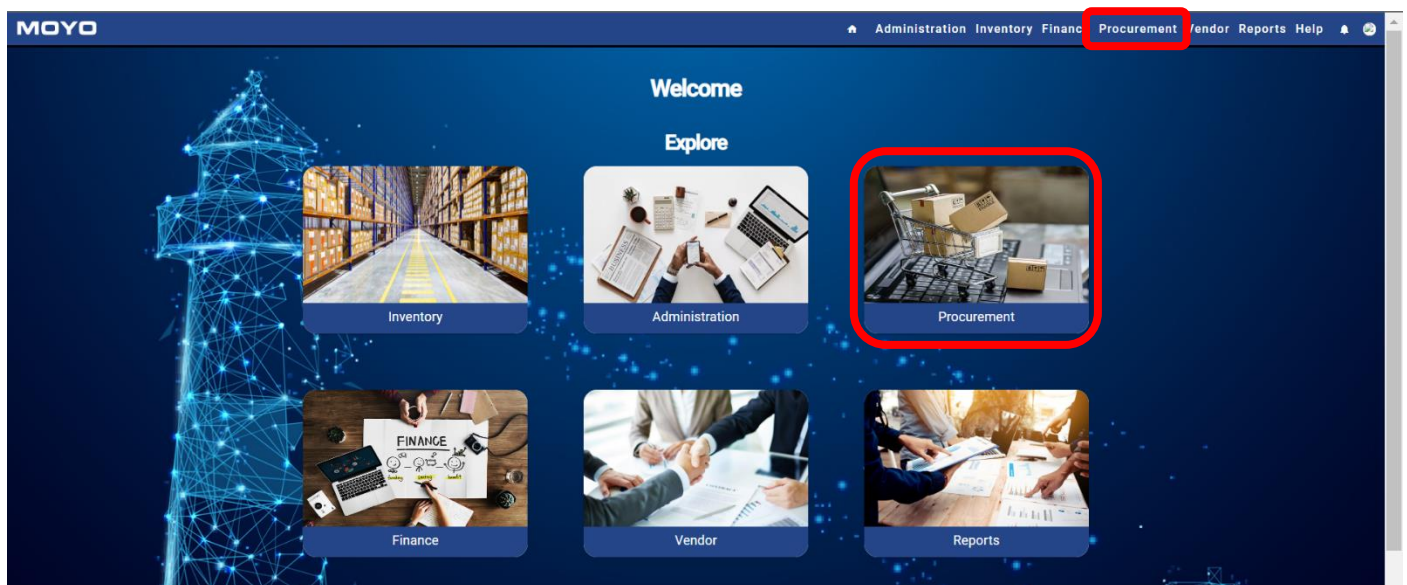

Figure 1 Home Screen to Procurement Request Screen

Then Click on the "View Procurement Request" button on the Procurement side navbar: (*Note you will only be able to see your own procurement requests)
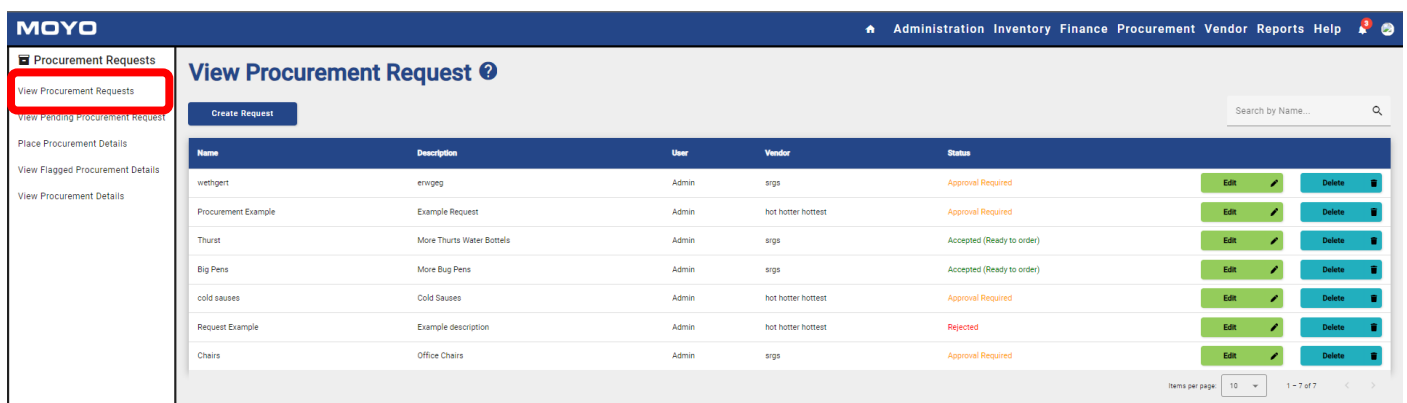

Figure 1 Procurement side nav to Procurement Request Screen

Step 2 Create Procurement Request:

Create a new Procurement Request by clicking on the "Create Request" button on the
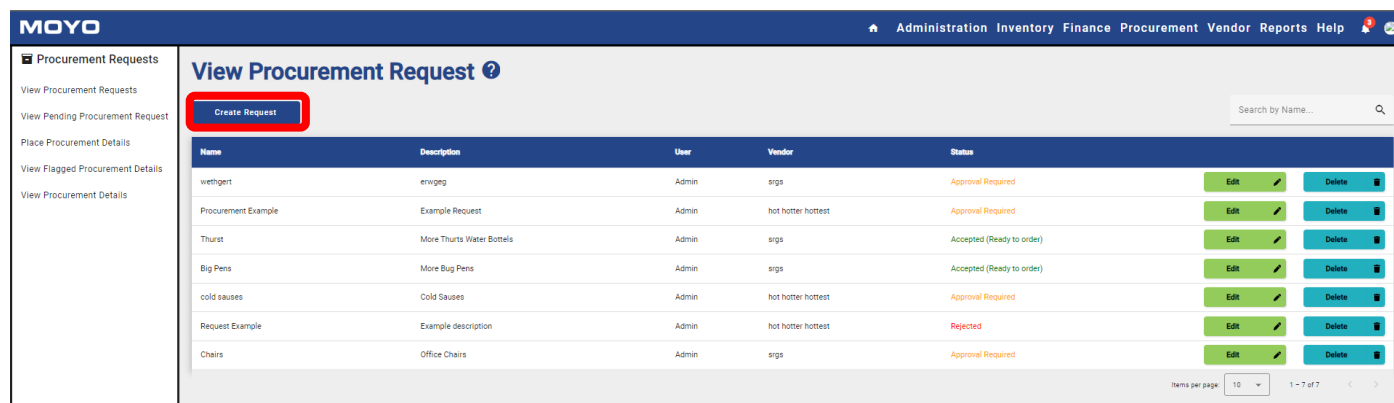
Procurement Request screen:

Figure 1 Click Create Procurement Request Button

This will navigate you to the "Create Procurement Request" screen where you will be able to create the new Procurement Request. If you want to create a Approved Vendor, click on the Approved Vendor radio button. Once done click the "Save" button create the procurement request.

Figure 1 Click Save Procurement Request Button Approved Vendor

1. "Request Name": Fill in the name of the procurement request. (Compulsory)
2. "Vendor": Choose a vendor for the list of approved/added vendors. (Compulsory)
3. "Request Description": Fill in the description of the procurement request. (Compulsory)

4. "The Procurement Quote": Provide the procurement quote for the procurement request. (Compulsory)

If you want to create a "Other ", click on the Other radio button. Once done click the "Save" button create the procurement request.

Figure 1 Click Create Procurement Request Button Other

1. "Request Name": Fill in the name of the procurement request. (Compulsory)
2. "Vendor Name": Fill in the name of the vendor for the procurement request. (Compulsory)
3. "Vendor Email": Fill in the email of the vendor for the procurement request. (Compulsory)
4. "Preferred Quote": Provide the preferred procurement quote for the procurement request. (Compulsory)
5. "Comparative Quote 1": Provide the first comparative procurement quote for the procurement request. (Compulsory)
6. "Comparative Quote 2": Provide the second comparative procurement quote for the procurement request. (Compulsory)
7. "Request Description": Fill in the description of the procurement request. (Compulsory)

Explanation of the Procurement Request statuses:

Figure 1 Procurement Request Status

- <u>Approved (Ready to order):</u> If the status is Approved that means that the procurement request has been approved and that you are now allowed to place the procurement request.
- <u>Rejected:</u> If the status is Rejected that means that the procurement request has been rejected and you will not be able to place the procurement request.
- <u>Approval Required:</u> If the status is Approval Required that means that the Procurement request is still waiting approval.