

# MOYO

Driving Significance Together

## User Manual

### PROCION SYSTEM ONLINE

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# Administration section

## Employee:

Create Employee, Edit Employee, Delete Employee, and Create Delegate Authority of Employee

### Step 1 Navigate to Employee screen:

Navigate to the Employee Screen by clicking on the “Administration” button on the top navbar or on the “Administration” button on the home screen:

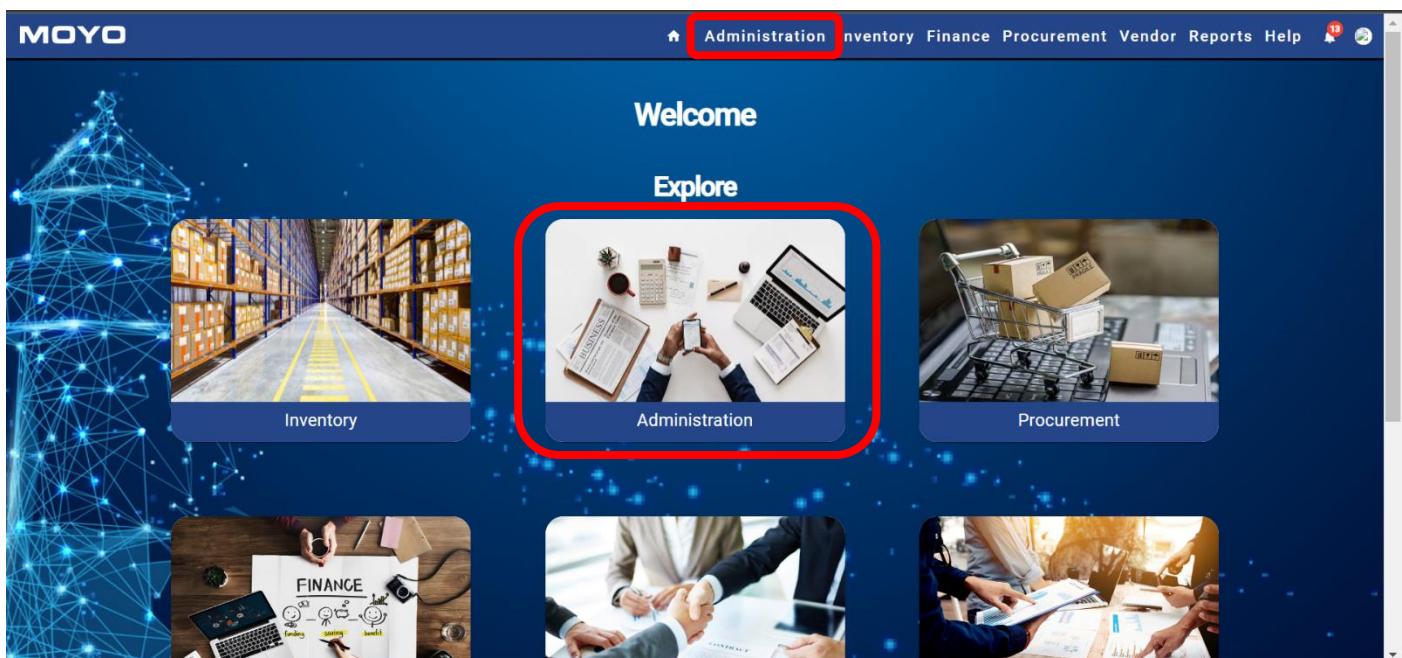


Figure 1 Home Screen to Employee Screen.

Then Click on the “Employee” button on the administration side navbar:



Name	Surname	Username	Email	Phone Number	Role	Branch	Department	Mandate Limit
Leon	Combrinck	LeonCombrinck765	leon.rigel324@gmail.com	0987654321	MD	Pretoria	BE	R10,000.00
Emil	Won	EmilWon098	leon.rigel324@gmail.com	0760980987	MD	Pretoria	BE	R10,000.00
john	Doe	johnDoe765	leon.rigel324@gmail.com	0987654321	Employee	Cape Town	Finance	R10,000.00
Luke	Theman	LukeTheman098	leon.rigel324@gmail.com	0760980987	Employee	Cape Town	Finance	R10,000.00
Proc	Emp	ProcEmp098	leon.rigel324@gmail.com	0760980987	Employee	Pretoria	BE	R200,000.00
ProcEmp	Ex	ProcEmpEx098	leon.rigel324@gmail.com	0760980987	MD	Pretoria	BE	R200,000.00

Figure 1 Admin Side Nav to Employee Screen.

## Step 2 Create Employee:

Create a new employee by clicking on the “Create Employee” button on the employee screen:

Figure 1 Click Create Employee Button.

This will navigate you to the “Create Employee” screen where you will be able to create a new employee. Fill in all the fields then click on the “Save” button to create a new Employee. (All fields are compulsory unless stated otherwise)



## Create Employee

?

Name: <input type="text" value="E.g. John"/> <small>Not more than 32 characters long.</small>	Surname: <input type="text" value="E.g. Doe"/> <small>Not more than 50 characters long.</small>
Email: <input type="text" value="E.g. example@gmail.co"/> <small>Please include spaces as shown in the placeholder.</small>	Phone Number: <input type="text" value="E.g. 0821234567"/>
Role: <input type="button" value="Choose one*"/>	Mandate Limit: <input type="button" value="Choose one*"/> <small>Employee spend limit.</small>
Department: <input type="button" value="Choose one*"/>	Branch: <input type="button" value="Choose one*"/>

**Save** **Cancel**

Figure 1 Click Save Create Employee Button.

1. **Name**: Fill in the name of the employee you want to add.
2. **Surname**: Fill in the surname of employee you want to add.
3. **Email**: Fill in the email of the employee you want to add.
4. **Phone Number**: Fill in the phone number of the employee you want to add.
5. **Role**: Choose a role for the employee from the list existing roles on the system.
6. **Mandate Limit**: Choose a mandate limit for the employee from the list existing mandate limits on the system.
7. **Department**: Choose a department for the employee from the list existing departments on the system.
8. **Branch**: Choose a Branch for the employee from the list existing Branches on the system.



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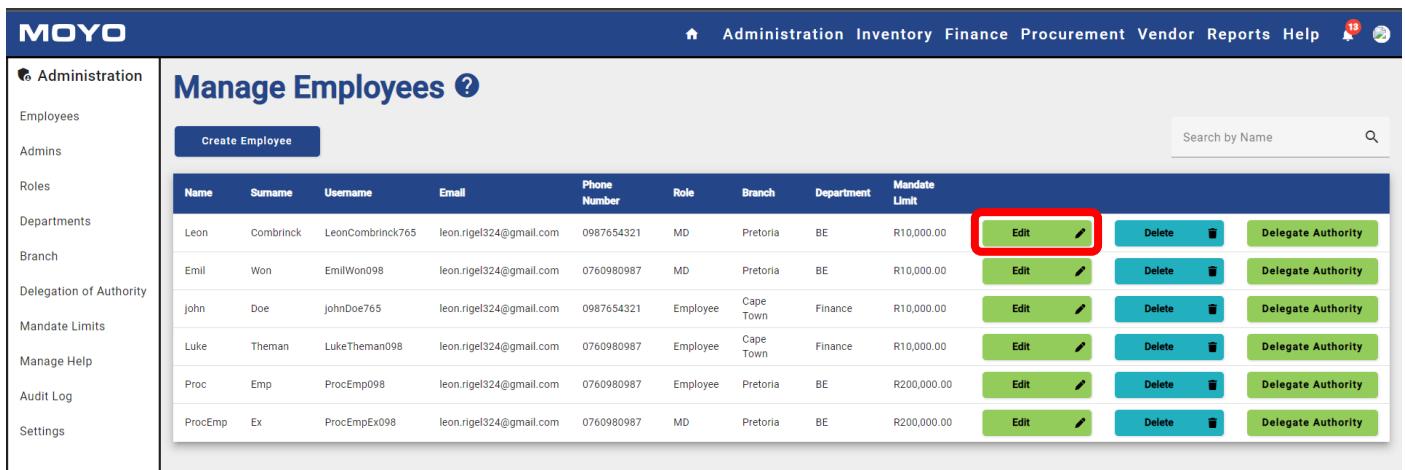


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## Step 3 Edit Employee:

Edit an employee by clicking on the “edit” button on the employee screen within the employee table: (The row you chose is the employee you will be editing)



The screenshot shows the MOYO software interface for managing employees. On the left is a sidebar with navigation links: Administration, Employees, Admins, Roles, Departments, Branch, Delegation of Authority, Mandate Limits, Manage Help, Audit Log, and Settings. The main area is titled "Manage Employees" and contains a table of employees. The table has columns for Name, Surname, Username, Email, Phone Number, Role, Branch, Department, and Mandate Limit. Each row includes an "Edit" button with a pencil icon, a "Delete" button with a trash icon, and a "Delegate Authority" button. The first row's "Edit" button is highlighted with a red box. A search bar at the top right says "Search by Name".

Name	Surname	Username	Email	Phone Number	Role	Branch	Department	Mandate Limit	Edit	Delete	Delegate Authority
Leon	Combrinck	LeonCombrinck765	leon.rigel324@gmail.com	0987654321	MD	Pretoria	BE	R10,000.00			
Emil	Won	EmilWon098	leon.rigel324@gmail.com	0760980987	MD	Pretoria	BE	R10,000.00			
john	Doe	johnDoe765	leon.rigel324@gmail.com	0987654321	Employee	Cape Town	Finance	R10,000.00			
Luke	Theman	LukeTheman098	leon.rigel324@gmail.com	0760980987	Employee	Cape Town	Finance	R10,000.00			
Proc	Emp	ProcEmp098	leon.rigel324@gmail.com	0760980987	Employee	Pretoria	BE	R200,000.00			
ProcEmp	Ex	ProcEmpEx098	leon.rigel324@gmail.com	0760980987	MD	Pretoria	BE	R200,000.00			

Figure 1 Click Edit Employee Button.

This will navigate you to the “Edit Employee” screen where you will be able to Edit the “Employee Information” and the “Employee Access”. Click on the “Employee Information” tab to edit the employee information. (All Details are prefilled)



The screenshot shows a web-based application for managing employee information. At the top, there are two tabs: "Employee Information" (which is selected and highlighted with a red border) and "Employee Access". Below the tabs, the main title is "Edit Employee Information?". The form consists of several input fields arranged in pairs:

- Name: Luke (with validation message: Not more than 32 characters long.)
- Surname: Theman (with validation message: Not more than 50 characters long.)
- Email: leon.rigel324@gmail.co
- Phone Number: 0760980987 (with placeholder: Please include spaces as shown in the placeholder.)
- Role: Employee (dropdown menu: Choose one\*)
- Mandate Limit: 10000 (dropdown menu: Choose one\*)
- Department: Finance (dropdown menu: Choose one\*)
- Branch: Cape Town (dropdown menu: Choose one\*)

At the bottom of the form are two buttons: a green "Save" button and a dark blue "Cancel" button.

Figure 1 Click Employee Information Tab.

1. **"Name"**: Change the name of the employee you want to add. (Not Compulsory)
2. **"Surname"**: Change the surname of employee you want to add. (Not Compulsory)
3. **"Email"**: Change the email of the employee you want to add. (Not Compulsory)
4. **"Phone Number"**: Change the phone number of the employee you want to add. (Not Compulsory)
5. **"Role"**: Change a role for the employee from the list existing roles on the system. (Not Compulsory)
6. **"Mandate Limit"**: Change a mandate limit for the employee from the list existing mandate limits on the system. (Not Compulsory)
7. **"Department"**: Change a department for the employee from the list existing departments on the system. (Not Compulsory)
8. **"Branch"**: Change a Branch for the employee from the list existing Branches on the system. (Not Compulsory)



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Click on the “Employee Access” tab to edit the employee access rights. (Access can only be True or False) (All Details are prefilled)

The screenshot shows a user interface titled "Edit Employee Access". At the top, there are two tabs: "Employee Information" and "Employee Access", with "Employee Access" being the active tab and highlighted with a red border. Below the tabs, the title "Edit Employee Access" is centered. The page contains eight dropdown menus, each labeled with a permission category and a pre-filled value of "False".

Can Access Inventory:	Choose one*	False
Can Access Finance:	Choose one*	False
Can Access Procurement:	Choose one*	False
Can Access Vendor:	Choose one*	False
Can Access Reports:	Choose one*	False
Can Approve Vendors:	Choose one*	False
Can Edit Vendors:	Choose one*	False
Can Delete Vendors:	Choose one*	False
Can View Pending Procurement Requests:	Choose one*	False
Can View Flagged Procurement Requests:	Choose one*	False
Can View Finalised Procurement Requests:	Choose one*	False

Figure 1 Click Employee Access Tab.

1. **“Can Access Inventory”:** If true this allows the employee to be able to access the inventory section of the system. (Not Compulsory)
2. **“Can Access Finances”:** If true this allows the employee to be able to access the finance section of the system. (Not Compulsory)
3. **“Can Access Procurement”:** If true this allows the employee to be able to access the procurement section of the system. (Not Compulsory)
4. **“Can Access Vendor”:** If true this allows the employee to be able to access the vendor section of the system. (Not Compulsory)
5. **“Can Access Reports”:** If true this allows the employee to be able to access the reports section of the system. (Not Compulsory)
6. **“Can Approve Vendor”:** If true this allows the employee to be able to access the vendor section of the system and be able to approve a vendor on the system. (Not Compulsory)



7. **“Can Edit Vendor”:** If true this allows the employee to be able to access the vendor section of the system and be able to edit a vendor on the system. (Not Compulsory)
8. **“Can Delete Vendor”:** If true this allows the employee to be able to access the vendor section of the system and be able to delete a vendor on the system. (Not Compulsory)
9. **“Can View Pending Procurement Requests”:** If true this allows the employee to be able to access the procurement section of the system and be able to view all pending procurement requests on the system, which includes approving and rejecting of a procurement request. (Not Compulsory)
10. **“Can View Flagged Procurement Requests”:** If true this allows the employee to be able to access the procurement section of the system and be able to view all flagged procurement requests on the system, which includes approving and rejecting of a flagged procurement request. (Not Compulsory)
11. **“Can View Finalised Procurement Requests”:** If true this allows the employee to be able to access the finance section of the system and be able to view all unfinalized procurement requests on the system, which includes being able to finalise a procurement request. (Not Compulsory)

Click on the “Save” button to save the changes of the edited employee. Navigate back to the “Employee Information” tab and click the “Save” button.

The screenshot shows the 'Edit Employee Information' page. At the top, there are two tabs: 'Employee Information' (which is active and highlighted with a red box) and 'Employee Access'. Below the tabs, the title 'Edit Employee Information' is displayed with a question mark icon. The form contains several input fields:

- Name:** Luke (Surname: Theman)
- Email:** leon.rigel324@gmail.co<sup>l</sup>
- Role:** Choose one\* Employee
- Department:** Choose one\* Finance
- Surname:** Not more than 50 characters long.
- Phone Number:** 0760980987
- Mandate Limit:** Choose one\* 10000
- Branch:** Choose one\* Cape Town

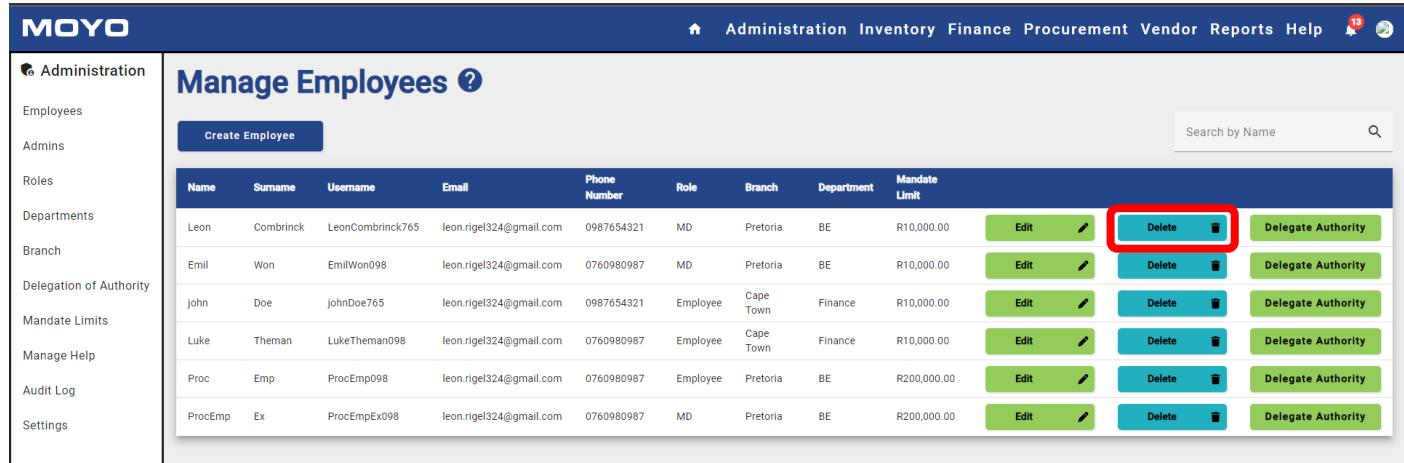
At the bottom of the form, there are two buttons: a green 'Save' button with a red border and a blue 'Cancel' button.

Figure 1 Click Save Edit Employee Button.



## Step 4 Delete Employee:

Delete an employee by clicking on the “Delete” button on the employee screen within the employee table: (The row you chose is the employee you will be deleting)



Manage Employees									
<a href="#">Create Employee</a> <span style="float: right;">Search by Name <input type="text"/></span>									
Name	Surname	Username	Email	Phone Number	Role	Branch	Department	Mandate Limit	
Leon	Combrinck	LeonCombrinck765	leon.rigel324@gmail.com	0987654321	MD	Pretoria	BE	R10,000.00	<a href="#">Edit</a>  <a href="#">Delete</a> 
Emil	Won	EmilWon098	leon.rigel324@gmail.com	0760980987	MD	Pretoria	BE	R10,000.00	<a href="#">Edit</a>  <a href="#">Delete</a> 
john	Doe	johnDoe765	leon.rigel324@gmail.com	0987654321	Employee	Cape Town	Finance	R10,000.00	<a href="#">Edit</a>  <a href="#">Delete</a> 
Luke	Theman	LukeTheman098	leon.rigel324@gmail.com	0760980987	Employee	Cape Town	Finance	R10,000.00	<a href="#">Edit</a>  <a href="#">Delete</a> 
Proc	Emp	ProcEmp098	leon.rigel324@gmail.com	0760980987	Employee	Pretoria	BE	R200,000.00	<a href="#">Edit</a>  <a href="#">Delete</a> 
ProcEmp	Ex	ProcEmpEx098	leon.rigel324@gmail.com	0760980987	MD	Pretoria	BE	R200,000.00	<a href="#">Edit</a>  <a href="#">Delete</a> 

Figure 1 Click Delete Employee Button

This will navigate you to the “Delete Employee” screen where you will be able to delete the employee. Click on the “Yes” button to delete the employee.

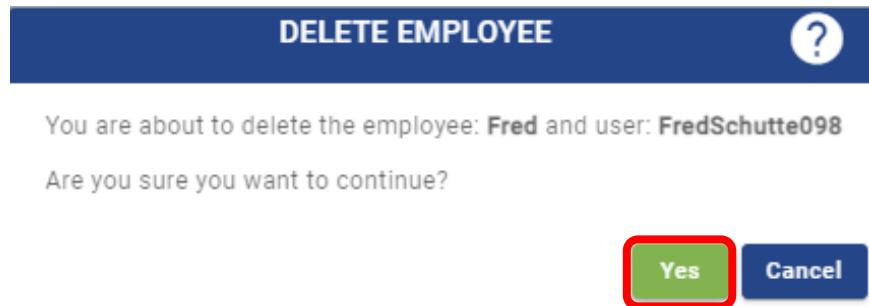


Figure 1 Click Yes Delete Employee Button



## Step 5 Delegate Authority of Employee:

Create a delegation of authority of an employee to by clicking on the “Delegate Authority” button on the employee screen within the employee table: (The row you chose is the employee you will be delegating the authority from)

Name	Surname	Username	Email	Phone Number	Role	Branch	Department	Mandate Limit	Edit	Delete	Delegate Authority
Leon	Combrinck	LeonCombrinck765	leon.rigel324@gmail.com	0987654321	MD	Pretoria	BE	R10,000.00			
Emil	Won	EmilWon098	leon.rigel324@gmail.com	0760980987	MD	Pretoria	BE	R10,000.00			
john	Doe	johnDoe765	leon.rigel324@gmail.com	0987654321	Employee	Cape Town	Finance	R10,000.00			
Luke	Theman	LukeTheman098	leon.rigel324@gmail.com	0760980987	Employee	Cape Town	Finance	R10,000.00			
Proc	Emp	ProcEmp098	leon.rigel324@gmail.com	0760980987	Employee	Pretoria	BE	R200,000.00			
ProcEmp	Ex	ProcEmpEx098	leon.rigel324@gmail.com	0760980987	MD	Pretoria	BE	R200,000.00			

Figure 1 Click Delegate Authority Button

This will navigate you to the “Assign Delegation” screen where you will be able to assign the authority of the employee you have chosen to another employee of your choosing. Click on the “Save” button to create the delegation of authority.



## Assign Delegation ?

Delegating Party: LeonCombrinck765

Delegate: Not more than 50 characters long.

Date Range: Start date – End date

MM/DD/YYYY – MM/DD/YYYY

Delegation Document: Choose File | No file chosen

**Save** **Cancel**

Figure 1 Click Save Delegate Employee Button

1. **“Delegating Party”:** This field will be prefilled with the employee you chose to delegate their authority.
2. **“Delegate”:** Fill in the Username of the employee you want to delegate the authority to. (Compulsory)
3. **“Date Range”:** Fill in the date range using the date picker for the period of the delegation. Once the period has passed the authority will be revoked automatically. (Compulsory)
4. **“Delegation Document”:** Provide the signed delegation of authority document. (Compulsory)



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## Admin:

Create Admin, Edit Admin, and Delete Admin:

### Step 1 Navigate to Admin screen:

Navigate to the Admin Screen by clicking on the “Administration” button on the top navbar or on the “Administration” button on the home screen:

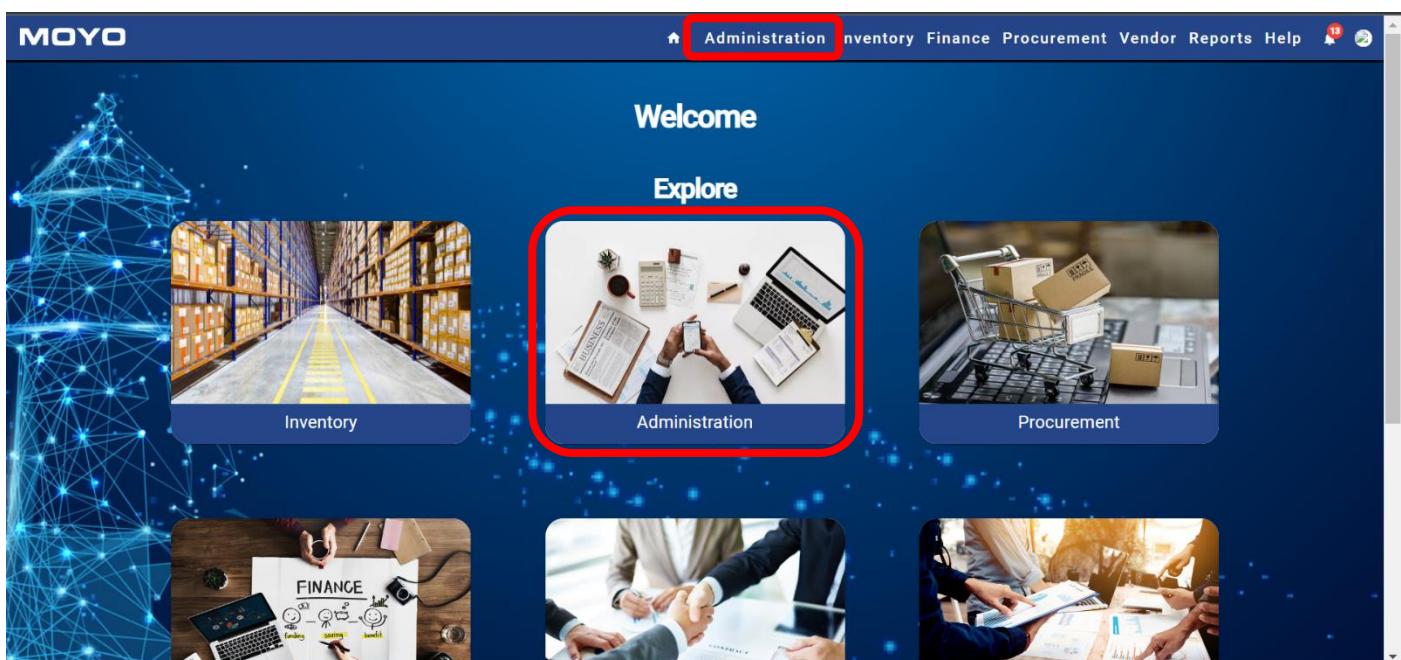


Figure 1 Home Screen to Admin Screen

Then Click on the “Admin” button on the administration side navbar:

The image shows the MOYO administration sidebar. On the left, there is a vertical menu with options: Administration (selected and highlighted with a red box), Employees, Admins (selected and highlighted with a red box), Roles, Departments, Branch, Delegation of Authority, Mandate Limits, Manage Help, Audit Log, and Settings. In the center, there is a main content area titled "Manage Admins" with a sub-tutorial icon. It includes a "Create Admin" button and a search bar. A table lists three admin users: Admin (Demo, moyoemailservice@gmail.com, 0793731393, Admin), Leon (Combrinck, leon.rige524@gmail.com, 0760980987, Admin), and New (Admin, leon.rige524@gmail.com, 0987654321, Admin). Each user row has "Edit" and "Delete" buttons.

Figure 1 Administration side nav to Admin Screen



## Step 2 Create Admin:

Create a new admin by clicking on the “Create Admin” button on the admin screen:

Name	Surname	Email	Phone Number	Role	Action
Admin	Demo	moyoservice@gmail.com	0795731393	Admin	<button>Edit</button> <button>Delete</button>
Leon	Combrinck	leon.rige924@gmail.com	0760980987	Admin	<button>Edit</button> <button>Delete</button>
New	Admin	leon.rige924@gmail.com	0987654321	Admin	<button>Edit</button> <button>Delete</button>

Figure 1 Click Create Admin Button

This will navigate you to the “Create Admin” screen where you will be able to create the new admin. Click on the “Save” button to create the new admin.

<h2>Create Admin</h2>	
<b>Name:</b>  E.g. John  Not more than 32 characters long.	<b>Surname:</b>  E.g. Doe  Not more than 50 characters long.
<b>Email:</b>  E.g. example@gmail.co	<b>Phone Number:</b>  E.g. 0821234567
<input style="border: 2px solid green; border-radius: 5px; padding: 5px; width: 100px; height: 30px; margin-right: 10px;" type="button" value="Save"/> <input style="border: 1px solid #ccc; border-radius: 5px; padding: 5px; width: 100px; height: 30px;" type="button" value="Cancel"/>	

Figure 1 Click Save Create Admin Button

- Name**: Fill in the name of the admin. (Compulsory)
- Surname**: Fill in the surname of the admin. (Compulsory)
- Email**: Fill in the email of the admin. (Compulsory)
- Phone Number**: Fill in the phone number of the admin. (Compulsory)



## Step 3 Edit Admin:

Edit an admin by clicking on the “edit” button on the admin screen within the admin table: (The row you chose is the admin you will be editing)

The screenshot shows the MOYO administration interface. On the left, there's a sidebar with links like 'Administration', 'Employees', 'Admins', 'Roles', 'Departments', 'Branch', 'Delegation of Authority', 'Mandate Limits', 'Manage Help', 'Audit Log', and 'Settings'. The main area is titled 'Manage Admins ?' and contains a table with three rows of admin data. Each row has 'Edit' and 'Delete' buttons at the end. The first row, which is highlighted, has its 'Edit' button circled in red.

Name	Surname	Email	Phone Number	Role	
Admin	Demo	moyocmailservice@gmail.com	0793731393	Admin	<span>Edit</span> <span>Delete</span>
Leon	Combrinck	leon.rigel324@gmail.com	0760980987	Admin	<span>Edit</span> <span>Delete</span>
New	Admin	leon.rigel324@gmail.com	0987654321	Admin	<span>Edit</span> <span>Delete</span>

Figure 1 Click Edit Admin Button.

This will navigate you to the “Edit Admin” screen where you will be able to Edit the “Admin Information” and the “Admin Access”. Click on the “Admin Information” tab to edit the admin information. (All Details are prefilled)

The screenshot shows the 'Edit Admin Information' screen. At the top, there are two tabs: 'Admin Information' (which is selected and highlighted with a red box) and 'Admin Access'. Below the tabs, the title 'Edit Admin Information ?' is displayed. The form contains four input fields: 'Name' (prefilled with 'Leon'), 'Surname' (prefilled with 'Combrinck'), 'Email' (prefilled with 'leon.rigel324@gmail.co'), and 'Phone Number' (prefilled with '0760980987'). Each field has a placeholder below it. At the bottom of the form are two buttons: a green 'Save' button and a blue 'Cancel' button.

Figure 1 Click Admin Information tab.

1. **Name**: Change the name of the admin. (Not Compulsory)
2. **Surname**: Change the surname of the admin. (Not Compulsory)
3. **Email**: Change the email of the admin. (Not Compulsory)
4. **Phone Number**: Change the phone number of the admin. (Not Compulsory)



Click on the “Admin Access” tab to edit the employee access rights. (Access can only be True or False) (All Details are prefilled)

The screenshot shows a user interface titled 'Edit Admin Access'. At the top, there are two tabs: 'Admin Information' and 'Admin Access', with 'Admin Access' being the active tab and highlighted with a red border. Below the tabs, the title 'Edit Admin Access' is centered. The page contains eight dropdown menus, each with the label 'Choose one\*' and the value 'True' selected. The labels for the dropdowns are: 'Can Access Inventory', 'Can Access Finance', 'Can Access Procurement', 'Can Access Vendor', 'Can Access Reports', 'Can Approve Vendors', 'Can Edit Vendors', 'Can Delete Vendors', 'Can View Pending Procurement Requests', 'Can View Finalised Procurement Requests', 'Can View Flagged Procurement Requests', and 'Can Approve Vendor'.

Figure 1 Click Admin Access Tab.

1. **“Can Access Inventory”:** If true this allows the admin to be able to access the inventory section of the system. (Not Compulsory)
2. **“Can Access Finances”:** If true this allows the admin to be able to access the finance section of the system. (Not Compulsory)
3. **“Can Access Procurement”:** If true this allows the admin to be able to access the procurement section of the system. (Not Compulsory)
4. **“Can Access Vendor”:** If true this allows the admin to be able to access the vendor section of the system. (Not Compulsory)
5. **“Can Access Reports”:** If true this allows the admin to be able to access the reports section of the system. (Not Compulsory)
6. **“Can Approve Vendor”:** If true this allows the admin to be able to access the vendor section of the system and be able to approve a vendor on the system. (Not Compulsory)



7. **“Can Edit Vendor”:** If true this allows the admin to be able to access the vendor section of the system and be able to edit a vendor on the system. (Not Compulsory)
8. **“Can Delete Vendor”:** If true this allows the admin to be able to access the vendor section of the system and be able to delete a vendor on the system. (Not Compulsory)
9. **“Can View Pending Procurement Requests”:** If true this allows the admin to be able to access the procurement section of the system and be able to view all pending procurement requests on the system, which includes approving and rejecting of a procurement request. (Not Compulsory)
10. **“Can View Flagged Procurement Requests”:** If true this allows the admin to be able to access the procurement section of the system and be able to view all flagged procurement requests on the system, which includes approving and rejecting of a flagged procurement request. (Not Compulsory)
11. **“Can View Finalised Procurement Requests”:** If true this allows the admin to be able to access the finance section of the system and be able to view all unfinalized procurement requests on the system, which includes being able to finalise a procurement request. (Not Compulsory)

Click on the “Save” button to save the changes of the edited admin. Navigate back to the “Admin Information” tab and click the “Save” button.

The screenshot shows a user interface for editing admin information. At the top, there are two tabs: "Admin Information" (which is highlighted with a red box) and "Admin Access". Below the tabs is the title "Edit Admin Information" followed by a help icon. The form contains four input fields arranged in a grid:

Name: Leon <small>Not more than 32 characters long.</small>	Surname: Combrinck <small>Not more than 50 characters long.</small>
Email: leon.rigel324@gmail.co	Phone Number: 0760980987

At the bottom of the form are two buttons: "Save" (highlighted with a red box) and "Cancel".

Figure 1 Click Save Edit Admin Button.



## Step 4 Delete Admin:

Delete an admin by clicking on the “Delete” button on the admin screen within the admin table: (The row you chose is the admin you will be deleting)

The screenshot shows the 'Manage Admins' page. On the left is a sidebar with links like Administration, Employees, Admins, Roles, Departments, Branch, Delegation of Authority, Mandate Limits, Manage Help, Audit Log, and Settings. The main area has a 'Create Admin' button and a table with columns: Name, Surname, Email, Phone Number, and Role. There are three rows of data. The first row, for 'Admin' (Surname 'Demo'), has a red box around its 'Delete' button. Each row has 'Edit' and 'Delete' buttons.

Name	Surname	Email	Phone Number	Role
Admin	Demo	moyomailservice@gmail.com	0793731393	Admin
Leon	Combrinck	leon.rige9324@gmail.com	0760980987	Admin
New	Admin	leon.rige9324@gmail.com	0987654321	Admin

Figure 1 Click Delete Admin Button

This will navigate you to the “Delete Admin” screen where you will be able to delete the admin. Click on the “Yes” button to delete the admin.

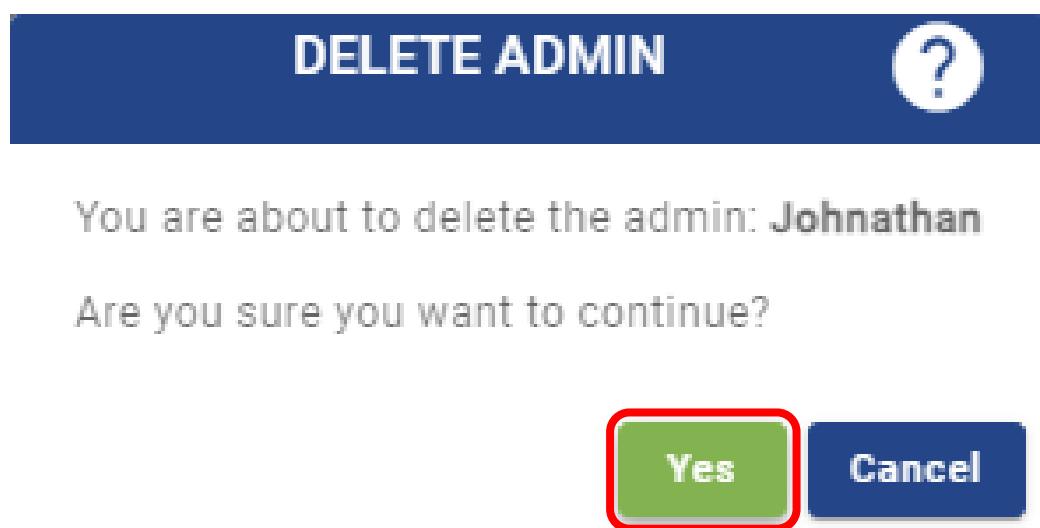


Figure 1 Click Yes Delete Admin Button

## Employee Roles:

Create Employee Role, Edit Employee Role, and Delete Employee Role:

### Step 1 Navigate to Employee Role screen:

Navigate to the Employee Role Screen by clicking on the “Administration” button on the top navbar or on the “Administration” button on the home screen:

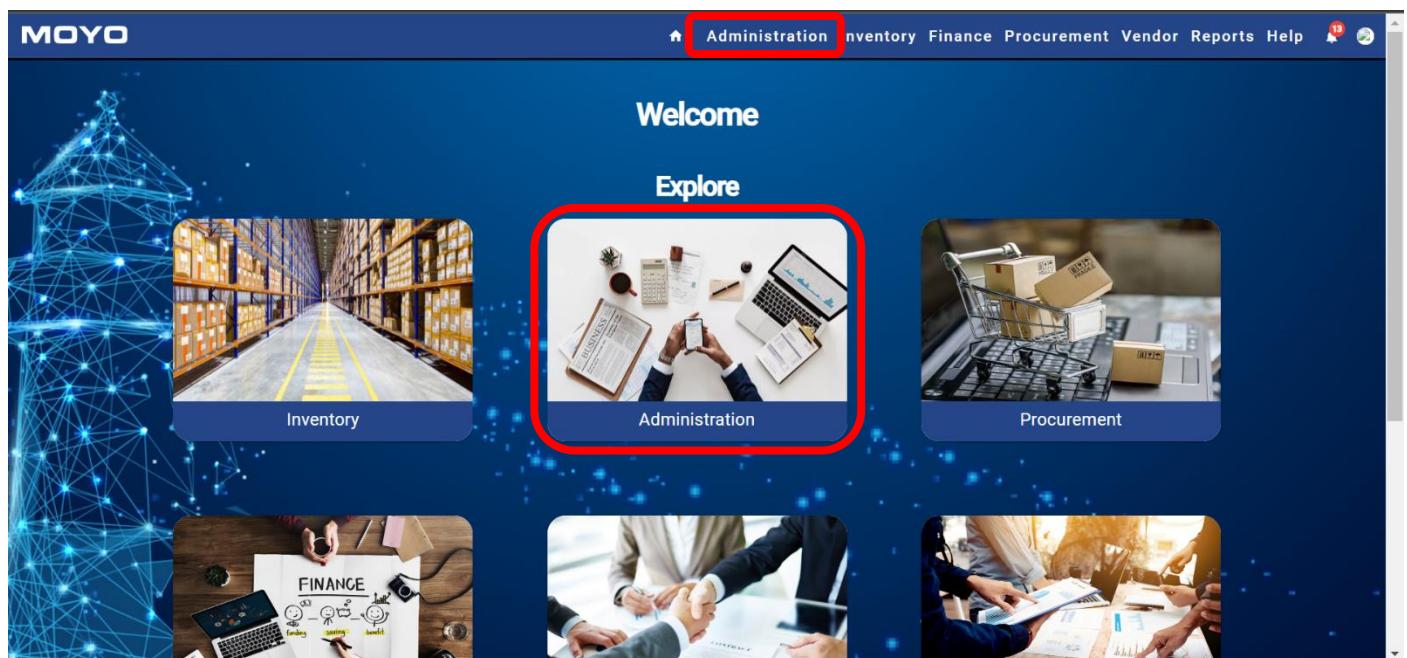


Figure 1 Home Screen to Employee Role Screen

Then Click on the “Roles” button on the administration side navbar:

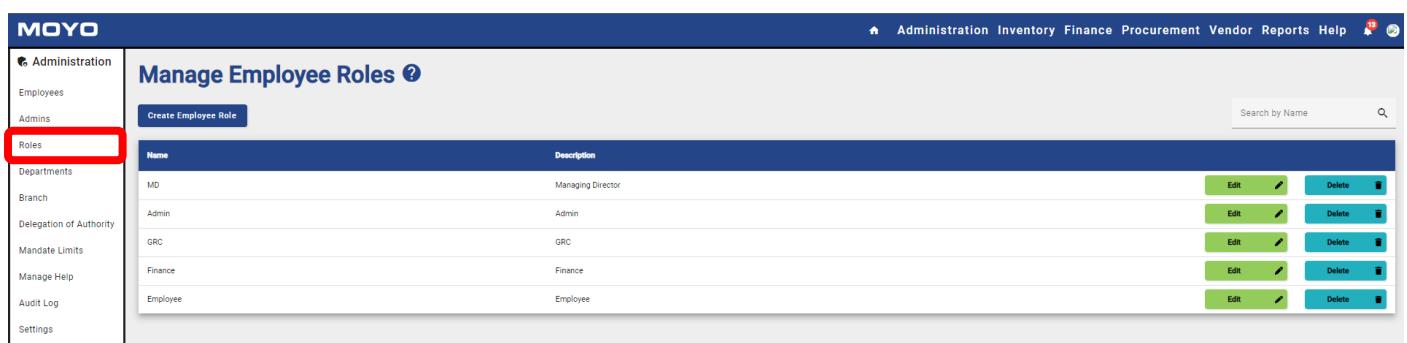


Figure 1 Administration side nav to Employee Role Screen



## Step 2 Create Employee Role:

Create a new employee role by clicking on the “Create Employee Role” button on the Employee Role screen:

The screenshot shows the MOYO software interface with a dark blue header bar. On the left, there's a sidebar with navigation links: Administration, Employees, Admins, Roles, Departments, Branch, Delegation of Authority, Mandate Limits, Manage Help, Audit Log, and Settings. The main area is titled "Manage Employee Roles" with a question mark icon. At the top left of the table, there's a red box highlighting the "Create Employee Role" button. The table has columns for "Name" and "Description". Data rows include MD (Managing Director), Admin, GRC, Finance, and Employee. Each row has "Edit" and "Delete" buttons at the end.

Figure 1 Click Create Employee Role Button

This will navigate you to the “Create Employee Role” screen where you will be able to create the new Employee Role. Click on the “Save” button to create the new employee role.

The screenshot shows a modal dialog box titled "Create Employee Roles?". It has two input fields: "Name:" with placeholder "E.g. HR" and "Description:" with placeholder "E.g. Human Resources". Below each field is a note: "Not more than 32 characters long." and "Not more than 50 characters long.". At the bottom are two buttons: a green "Save" button with a red border and a blue "Cancel" button.

Figure 1 Click Save Create Employee Role Button

1. Name: Fill in the name of the role. (Compulsory)
2. Description: Fill in the description of the role. (Compulsory)



## Step 3 Edit Employee Role:

Edit an Employee Role by clicking on the “edit” button on the employee role screen within the employee role table: (The row you chose is the employee role you will be editing)

The screenshot shows the 'Manage Employee Roles' page. On the left is a sidebar with navigation links: Administration, Employees, Admins, Roles, Departments, Branch, Delegation of Authority, Mandate Limits, Manage Help, Audit Log, and Settings. The main area has a title 'Manage Employee Roles' with a help icon. Below it is a table with columns 'Name' and 'Description'. The table contains six rows: MD (Managing Director), Admin, GRC, Finance, and Employee. To the right of each row are 'Edit' and 'Delete' buttons. The 'Edit' button for the 'Employee' row is highlighted with a red box.

Name	Description		
MD	Managing Director	Edit	Delete
Admin	Admin	Edit	Delete
GRC	GRC	Edit	Delete
Finance	Finance	Edit	Delete
Employee	Employee	Edit	Delete

Figure 1 Click Edit Employee Role Button.

This will navigate you to the “Edit Employee Role” screen where you will be able to Edit the employee role. Click on the “Save” button to edit the employee role. (All Details are prefilled)

The screenshot shows the 'Edit Employee Roles' dialog box. It has two input fields: 'Name:' containing 'Employee' and 'Description:' containing 'Employee'. Below the 'Name' field is a note: 'Not more than 32 characters long.' Below the 'Description' field is a note: 'Not more than 50 characters long.' At the bottom are two buttons: 'Save' (highlighted with a red box) and 'Cancel'.

Figure 1 Click Save Edit Employee Role Button.

1. [“Name”](#): Change the name of the role. (Not Compulsory)
2. [“Description”](#): Change the description of the role. (Not Compulsory)



## Step 4 Delete Employee Role:

Delete an Employee Role by clicking on the “Delete” button on the employee role screen within the employee role table: (The row you chose is the employee role you will be deleting)

The screenshot shows a software interface titled 'MOYO'. On the left, there's a sidebar with navigation links: Administration, Employees, Admins, Roles, Departments, Branch, Delegation of Authority, Mandate Limits, Manage Help, Audit Log, and Settings. The main area is titled 'Manage Employee Roles' with a sub-link 'Create Employee Role'. It features a table with columns 'Name' and 'Description'. The table contains six rows: MD (Managing Director), Admin (Admin), GRC (GRC), Finance (Finance), and Employee (Employee). To the right of each row are two buttons: 'Edit' (green) and 'Delete' (blue). The 'Delete' button for the 'Employee' row is highlighted with a red box.

Figure 1 Click Delete Employee Role Button

This will navigate you to the “Delete Employee Role” screen where you will be able to delete the employee role. Click on the “Yes” button to delete the employee role.

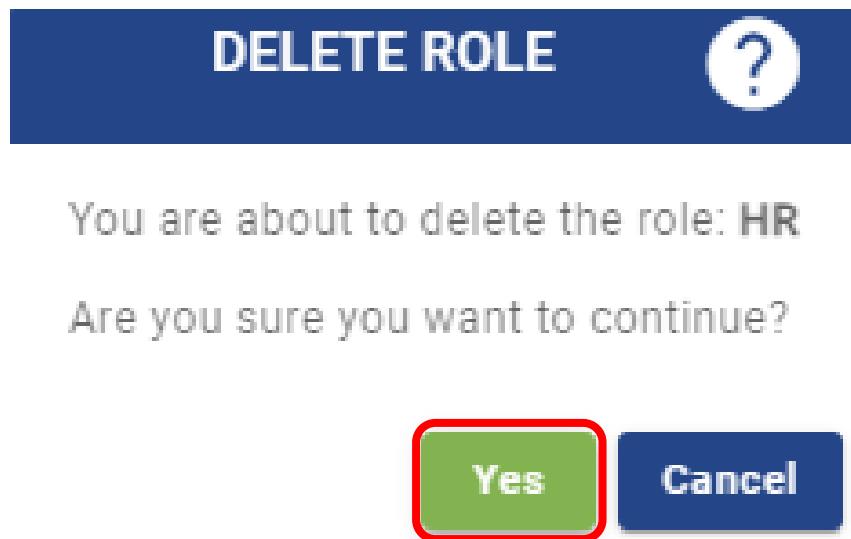


Figure 1 Click Yes Delete Employee Role Button



## Department:

Create Department, Edit Department, and Delete Department:

### Step 1 Navigate to Department screen:

Navigate to the Department Screen by clicking on the “Administration” button on the top navbar or on the “Administration” button on the home screen:

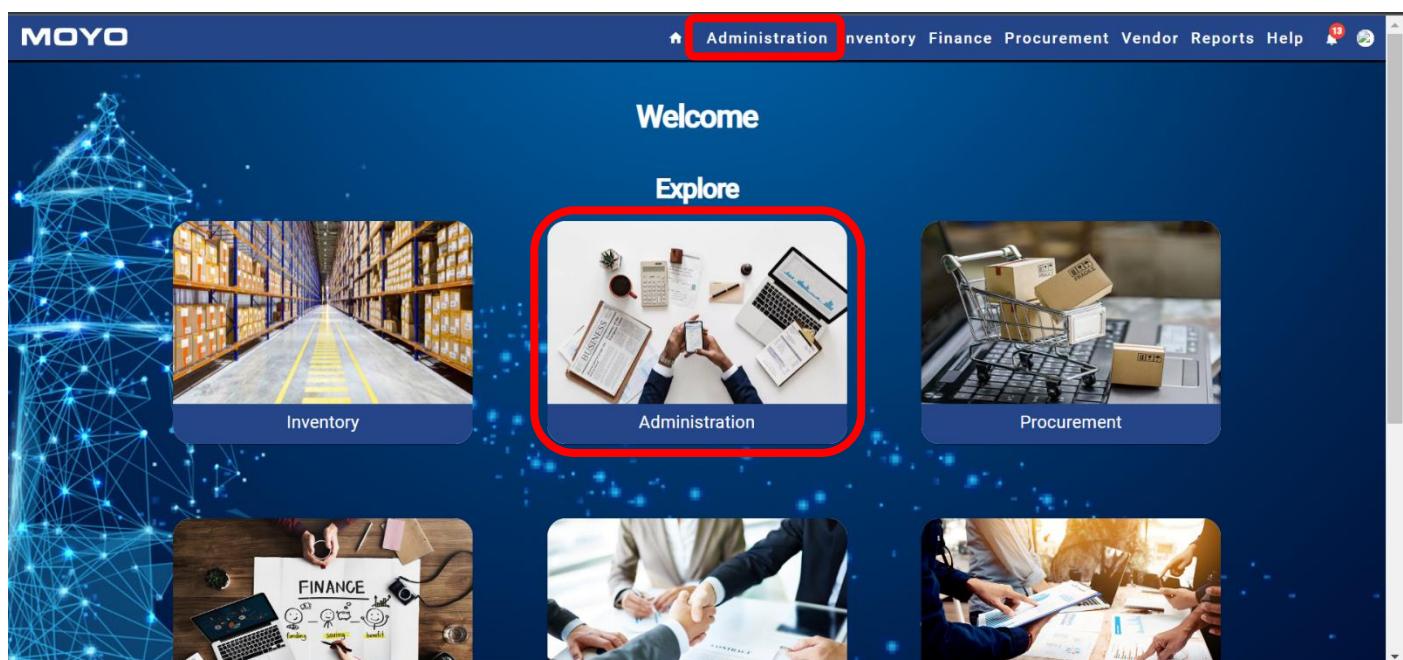


Figure 1 Home Screen to Department Screen

Then Click on the “Departments” button on the administration side navbar:

The image shows the MOYO administration side navigation bar. The "Administration" link is highlighted with a red box. Below the navigation bar, the main content area is titled "Manage Department ?". It features a "Create Department" button and a table listing departments. The table has columns for "Name" and "Description". The listed departments are:

Name	Description	Edit	Delete
BE	Business Enablement		
Finance	Finance Department		
HR	Human Resource Department		

Figure 1 Administration side nav to Department Screen



## Step 2 Create Department:

Create a new department by clicking on the “Create Department” button on the Department screen:

The screenshot shows the MOYO software interface. On the left is a sidebar with various administration options like Employees, Admins, Roles, Departments, Branch, Delegation of Authority, Mandate Limits, Manage Help, Audit Log, and Settings. The main area is titled 'Manage Department'. It has a table with columns 'Name' and 'Description'. Three rows are listed: BE (Business Enablement), Finance (Finance Department), and HR (Human Resource Department). Each row has 'Edit' and 'Delete' buttons. At the top right of the main area is a search bar labeled 'Search by name' with a magnifying glass icon. Below the search bar is a red box highlighting the 'Create Department' button.

Figure 1 Click Create Department Button

This will navigate you to the “Create Department” screen where you will be able to create the new department. Click on the “Save” button to create the new department.

The screenshot shows the 'Create Department' dialog box. It has two input fields: 'Name:' and 'Description:'. The 'Name:' field has a note below it: 'Not more than 32 characters long.' The 'Description:' field has a note below it: 'Not more than 50 characters long.' At the bottom are two buttons: 'Save' (highlighted with a red box) and 'Cancel'.

Figure 1 Click Save Create Department Button

3. **Name**: Fill in the name of the department. (Compulsory)
4. **Description**: Fill in the description of the department. (Compulsory)



## Step 3 Edit Department:

Edit a department by clicking on the “Edit” button on the department screen within the department table: (The row you chose is the department you will be editing)

Name	Description	Edit	Delete
BE	Business Enablement		
Finance	Finance Department		
HR	Human Resource Department		

Figure 1 Click Edit Department Button.

This will navigate you to the “Edit Department” screen where you will be able to Edit the department. Click on the “Save” button to edit the department. (All Details are prefilled)

Name:  
MBA Gen  
Not more than 32 characters long.

Description:  
MBA General  
Not more than 50 characters long.

**Save**      **Cancel**

Figure 1 Click Save Edit Department Button.

1. “Name”: Change the name of the department. (Not Compulsory)



2. Description: Change the description of the department. (Not Compulsory)

### Step 4 Delete Department:

Delete a department by clicking on the “Delete” button on the department screen within the department table: (The row you chose is the department you will be deleting)

Name	Description	Edit	Delete
BE	Business Enablement		
Finance	Finance Department		
HR	Human Resource Department		

Figure 1 Click Delete Department Button

This will navigate you to the “Delete Department” screen where you will be able to delete the department. Click on the “Yes” button to delete the department.



You are about to delete the Department: **HR**

Are you sure you want to continue?



Figure 1 Click Yes Delete Department Button



## Branch:

Create Branch, Edit Branch, and Delete Branch:

### Step 1 Navigate to Branch screen:

Navigate to the Branch Screen by clicking on the “Administration” button on the top navbar or on the “Administration” button on the home screen:

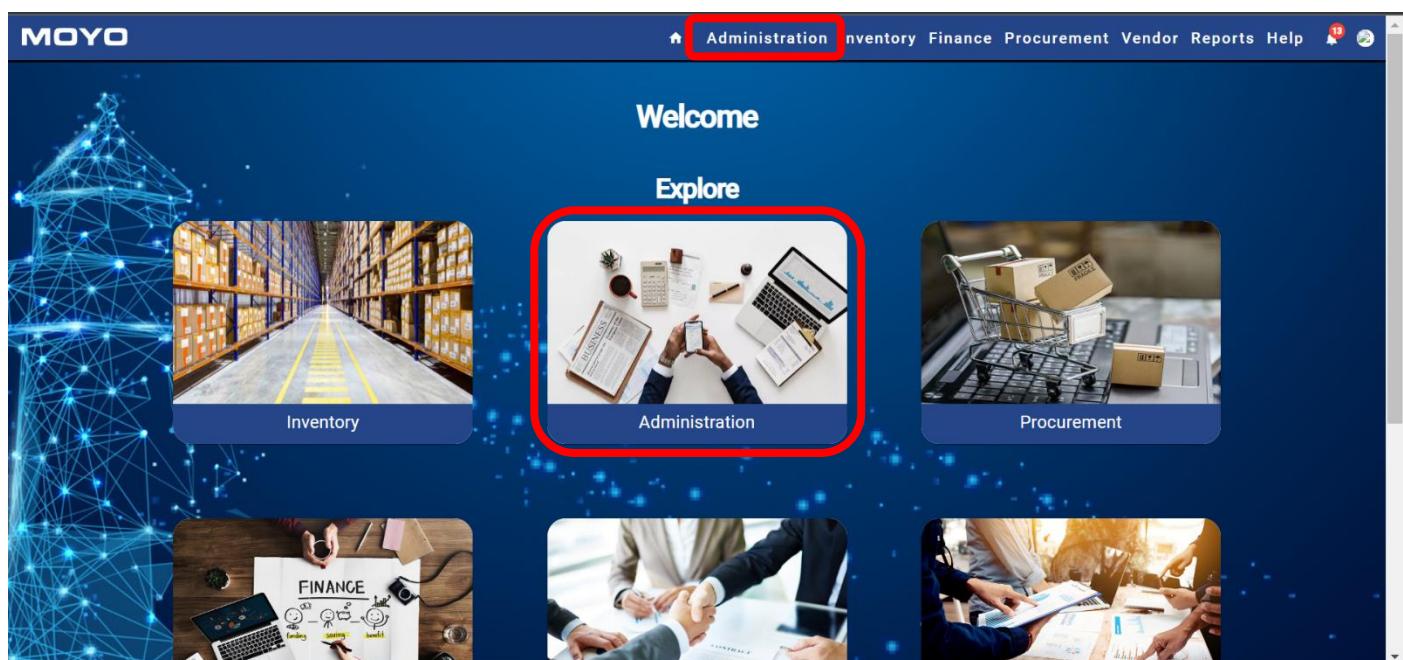


Figure 1 Home Screen to Branch Screen

Then Click on the “Branch” button on the administration side navbar:

The image shows the MOYO application's administration side navigation bar on the left, with a red box highlighting the "Branch" option under the "Administration" section. The main content area is titled "Manage Branch" and shows a table of existing branches. The table has columns for Name, Street, City, Postal Code, Province, and two action buttons (Edit and Delete) for each row. The rows show data for Pretoria, Cape Town, and Upington.

Name	Street	City	Postal Code	Province	Edit	Delete
Pretoria	Jean Ave	Pretoria	0042	Gauteng		
Cape Town	CP 77	Cape Town	0987	Western Cape		
Upington	up 44	Upington	2543	Nothern Cape		

Figure 1 Administration side nav to Branch Screen



## Step 2 Create Branch:

Create a new branch by clicking on the “Create Branch” button on the Branch screen:

The screenshot shows the MOYO software interface with a sidebar on the left containing navigation links like Administration, Employees, Admins, Roles, Departments, Branch, Delegation of Authority, Mandate Limits, Manage Help, Audit Log, and Settings. The main area is titled "Manage Branch" and displays a table of existing branches. The "Create Branch" button is highlighted with a red box. The table columns are Name, Street, City, Postal Code, and Province. Each row has "Edit" and "Delete" buttons.

Name	Street	City	Postal Code	Province	Edit	Delete
Pretoria	Jean Ave	Pretoria	0042	Gauteng		
Cape Town	CP 77	Cape Town	0987	Western Cape		
Upington	up 44	Upington	2543	Nothern Cape		

Figure 1 Click Create Branch Button

This will navigate you to the “Create Branch” screen where you will be able to create the new branch. Click on the “Save” button to create the new branch.

The screenshot shows the "Create Branch" form. It has four input fields: "Name", "Street", "City", and "Postal Code". Each field has a character limit note below it. At the bottom are "Save" and "Cancel" buttons, with "Save" being highlighted with a red box.

Name:	Street:
Not more than 32 characters long.	
City:	Postal Code:
Not more than 100 characters long.	
Not more than 4 characters long.	
Province:	
Not more than 20 characters long.	
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

Figure 1 Click Save Create Branch Button

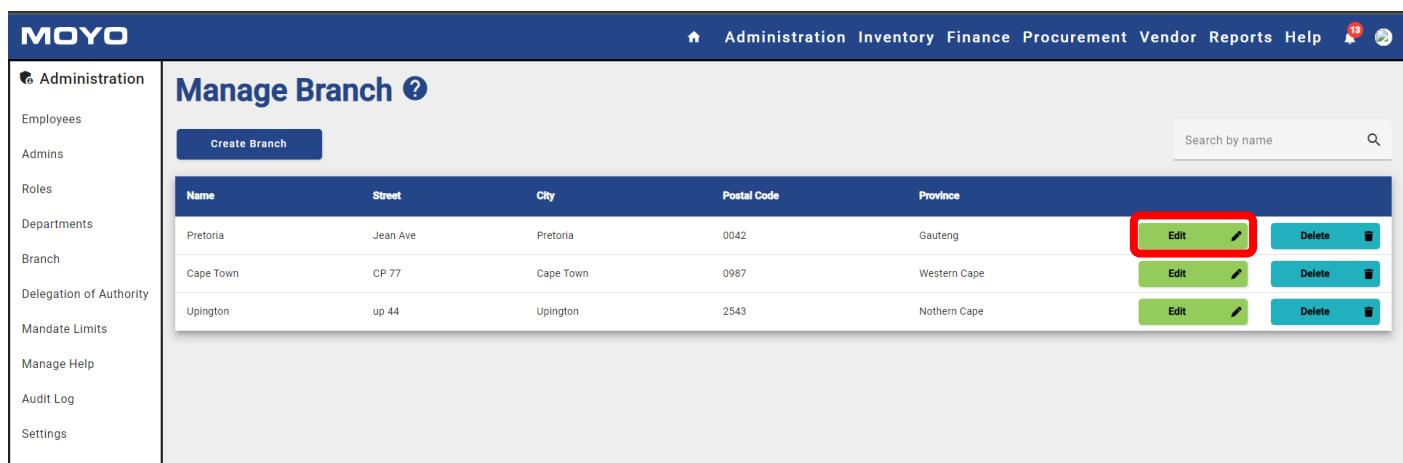
1. Name: Fill in the name of the branch. (Compulsory)



2. **“Street”:** Fill in the street of the Branch. (Compulsory)
3. **“City”:** Fill in the city of the Branch. (Compulsory)
4. **“Postal Code”:** Fill in the postal code of the Branch. (Compulsory)
5. **“Province”:** Fill in the province of the Branch. (Compulsory)

### Step 3 Edit Branch:

Edit a branch by clicking on the “Edit” button on the branch screen within the branch table: (The row you chose is the branch you will be editing)



The screenshot shows the MOYO software interface with a dark blue header bar. On the left, there's a sidebar with navigation links: Administration, Employees, Admins, Roles, Departments, Branch, Delegation of Authority, Mandate Limits, Manage Help, Audit Log, and Settings. The main content area has a title 'Manage Branch ?'. Below it is a table with columns: Name, Street, City, Postal Code, and Province. Three rows of data are listed: Pretoria (Jean Ave, Pretoria, 0042, Gauteng), Cape Town (CP 77, Cape Town, 0987, Western Cape), and Upington (up 44, Upington, 2543, Northern Cape). To the right of each row are two buttons: 'Edit' (with a pencil icon) and 'Delete' (with a trash bin icon). The 'Edit' button for the Pretoria row is highlighted with a red box.

Name	Street	City	Postal Code	Province		
Pretoria	Jean Ave	Pretoria	0042	Gauteng	<span>Edit</span>	<span>Delete</span>
Cape Town	CP 77	Cape Town	0987	Western Cape	<span>Edit</span>	<span>Delete</span>
Upington	up 44	Upington	2543	Northern Cape	<span>Edit</span>	<span>Delete</span>

Figure 1 Click Edit Branch Button.

This will navigate you to the “Edit Branch” screen where you will be able to Edit the branch. Click on the “Save” button to edit the branch. (All Details are prefilled)



## Edit Branch



Name:	Street:
Upington	up 44
Not more then 32 characters long.	
City:	Postal Code:
Upington	2543
Not more then 30 characters long.	
Province:	
Nothern Cape	Not more then 4 characters long.
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

Figure 1 Click Save Edit Branch Button.

1. **Name**: Change the name of the branch. (Not Compulsory)
2. **Street**: Change the street of the Branch. (Not Compulsory)
3. **City**: Change the city of the Branch. (Not Compulsory)
4. **Postal Code**: Change the postal code of the Branch. (Not Compulsory)
5. **Province**: Change the province of the Branch. (Not Compulsory)



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MOYO

## Step 4 Delete Branch:

Delete a branch by clicking on the “Delete” button on the branch screen within the branch table: (The row you chose is the branch you will be deleting)

Name	Street	City	Postal Code	Province	Edit	Delete
Pretoria	Jean Ave	Pretoria	0042	Gauteng		
Cape Town	CP 77	Cape Town	0987	Western Cape		
Upington	up 44	Upington	2543	Nothern Cape		

Figure 1 Click Delete Branch Button

This will navigate you to the “Delete Branch” screen where you will be able to delete the branch. Click on the “Yes” button to delete the branch.

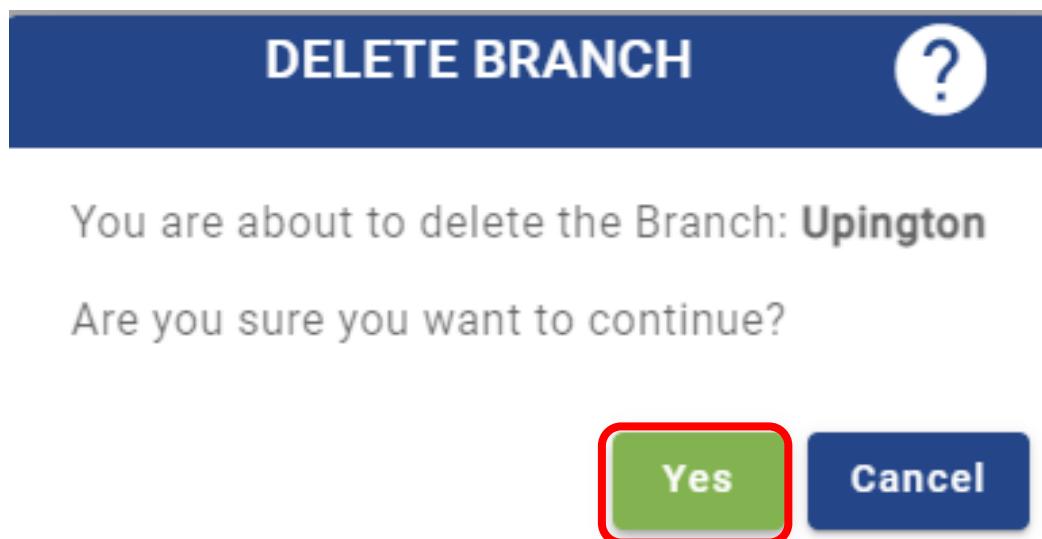


Figure 1 Click Yes Delete Branch Button



## Delegation of Authority:

Edit Delegation, Delete Delegation, and Revoke Delegation:

### Step 1 Navigate to Delegation of Authority screen:

Navigate to the delegation of authority Screen by clicking on the “Administration” button on the top navbar or on the “Administration” button on the home screen:

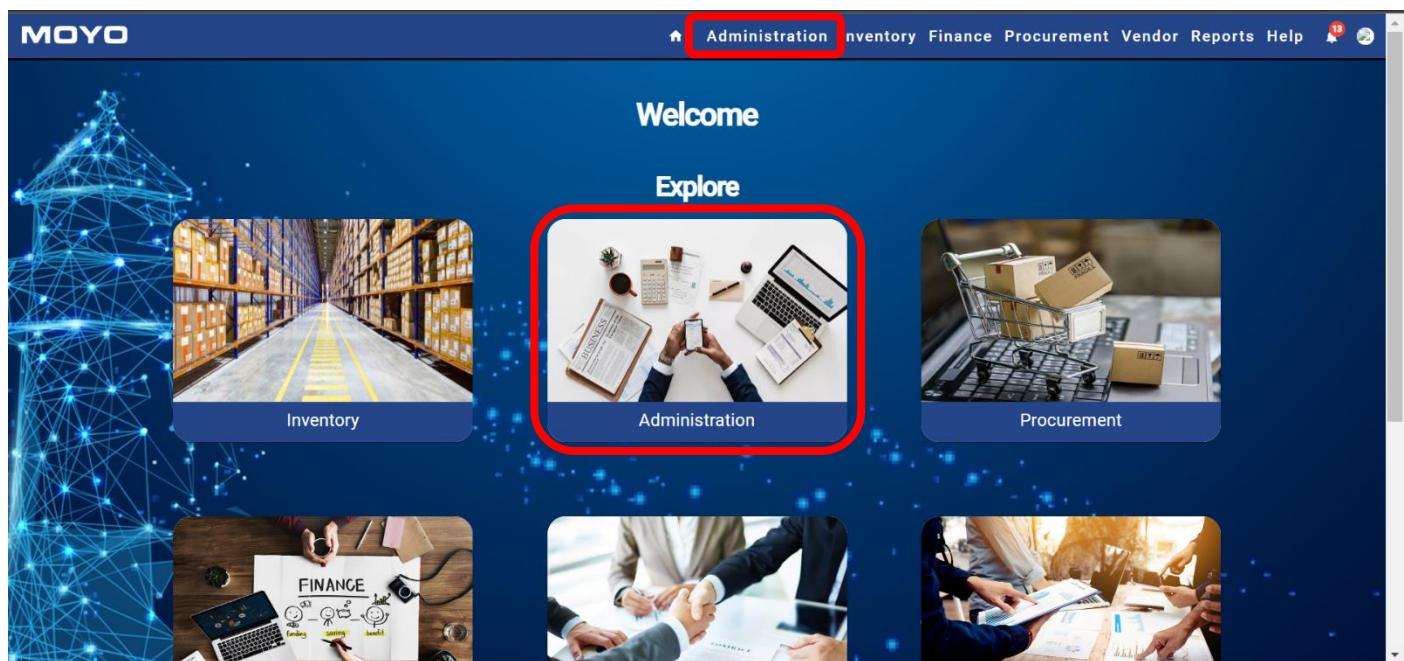


Figure 1 Home Screen to Delegation Screen

Then Click on the “Delegation of Authority” button on the administration side navbar:

Delegating Party	Delegate	Start Date	End Date	Delegation Form	Status			
LeonCombrinck765	EmilieWon098	22/08/2023	23/08/2023	<a href="#">Budget Variance Report (2).pdf</a>	Revoked	<a href="#">Edit</a>	<a href="#">Delete</a>	<a href="#">Revoke Access</a>
johnDoe765	LukeTheman098	23/08/2023	26/08/2023	<a href="#">Budget Variance Report.pdf</a>	Revoked	<a href="#">Edit</a>	<a href="#">Delete</a>	<a href="#">Revoke Access</a>
ProcEmp098	ProcEmpEx098	26/08/2023	29/08/2023	<a href="#">Approved Vendor Report List.pdf</a>	Inactive	<a href="#">Edit</a>	<a href="#">Delete</a>	<a href="#">Revoke Access</a>
FredMerc765	NickTat098	24/08/2023	31/08/2023	<a href="#">ApprovedVendorListReport (1).pdf</a>	Active	<a href="#">Edit</a>	<a href="#">Delete</a>	<a href="#">Revoke Access</a>

Figure 1 Administration side nav to Delegation Screen



## Step 2 Edit Delegation of Authority:

Edit a delegation of authority by clicking on the “Edit” button on the delegation of authority screen within the delegation of authority table: (The row you chose is the delegation of authority you will be editing)

Delegating Party	Delegate	Start Date	End Date	Delegation Form	Status	Action Buttons
LeonCombrinck765	EmilWon098	22/08/2023	23/08/2023	<a href="#">Budget Variance Report (2).pdf</a>	Revoked	<span style="background-color: #2e7131; color: white; border-radius: 5px; padding: 2px 5px;">Edit</span> <span style="border: 1px solid #2e7131; border-radius: 5px; padding: 2px 5px;">Delete</span> <span style="border: 1px solid #2e7131; border-radius: 5px; padding: 2px 5px;">Revoke Access</span>
johnDoe765	LukeTheman098	23/08/2023	26/08/2023	<a href="#">Budget Variance Report.pdf</a>	Revoked	<span style="background-color: #2e7131; color: white; border-radius: 5px; padding: 2px 5px;">Edit</span> <span style="border: 1px solid #2e7131; border-radius: 5px; padding: 2px 5px;">Delete</span> <span style="border: 1px solid #2e7131; border-radius: 5px; padding: 2px 5px;">Revoke Access</span>
ProcEmp098	ProcEmpEx098	26/08/2023	29/08/2023	<a href="#">Approved Vendor Report List.pdf</a>	Inactive	<span style="background-color: #2e7131; color: white; border-radius: 5px; padding: 2px 5px;">Edit</span> <span style="border: 1px solid #2e7131; border-radius: 5px; padding: 2px 5px;">Delete</span> <span style="border: 1px solid #2e7131; border-radius: 5px; padding: 2px 5px;">Revoke Access</span>
FredMerc765	NickTat098	24/08/2023	31/08/2023	<a href="#">ApprovedVendorListReport (1).pdf</a>	Active	<span style="background-color: #2e7131; color: white; border-radius: 5px; padding: 2px 5px;">Edit</span> <span style="border: 1px solid #2e7131; border-radius: 5px; padding: 2px 5px;">Delete</span> <span style="border: 1px solid #2e7131; border-radius: 5px; padding: 2px 5px;">Revoke Access</span>

Figure 1 Click Edit Delegation Button.

This will navigate you to the “Edit Delegation of Authority” screen where you will be able to Edit the delegation of authority. Click on the “Save” button to edit the delegation of authority.

## Edit Delegation ?

Delegating Party:

Delegate:

Not more than 50 characters long.

---

Date Range:

CALENDAR

MM/DD/YYYY - MM/DD/YYYY

---

Delegation Document:

Choose File No file chosen

Save
Cancel

Figure 1 Click Save Edit Delegation Button.



1. **“Delegating Party”:** This field is prefilled and cannot be changed.
2. **“Delegate”:** Change the Username of the employee you want to delegate the authority to. (Not Compulsory)
3. **“Date Range”:** Fill in the date range using the date picker for the period of the delegation. Once the period has passed the authority will be revoked automatically. (Compulsory)
4. **“Delegation Document”:** Provide the signed delegation of authority document. (Compulsory)

### Step 3 Delete Delegation od Authority:

Delete a delegation of authority by clicking on the “Delete” button on the delegation of authority screen within the delegation of authority table: (The row you chose is the delegation of authority you will be deleting)

Delegating Party	Delegate	Start Date	End Date	Delegation Form	Status	Edit	Delete	Revoke Access
LeonCombrinck765	EmilWon098	22/08/2023	23/08/2023	<a href="#">Budget Variance Report (2).pdf</a>	Revoked			
johnDoe765	LukeTheman098	23/08/2023	26/08/2023	<a href="#">Budget Variance Report.pdf</a>	Revoked			
ProcEmp098	ProcEmpEx098	26/08/2023	29/08/2023	<a href="#">Approved Vendor Report List.pdf</a>	Inactive			
FredMerc765	NickTat098	24/08/2023	31/08/2023	<a href="#">ApprovedVendorListReport (1).pdf</a>	Active			

Figure 1 Click Delete Delegation Button

This will navigate you to the “Delete Delegation of Authority” screen where you will be able to delete the delegation of authority. Click on the “Yes” button to delete the delegation of authority.





You are about to delete the request no: 4 for delegating user **FredMerc765**

Are you sure you want to continue?



Figure 1 Click Yes Delete Delegation Button

#### Step 4 Revoke Delegation od Authority:

Revoke a delegation of authority by clicking on the “Revoke Access” button on the delegation of authority screen within the delegation of authority table: (The row you chose is the delegation of authority you will be revoking)

A screenshot of the MOYO software interface showing the "Manage Delegation of Authority" screen. The left sidebar has a tree view with "Administration" expanded, showing "Employees", "Admins", "Roles", "Departments", "Branch", "Delegation of Authority" (which is selected), "Mandate Limits", "Manage Help", "Audit Log", and "Settings". The main area has a title "Manage Delegation of Authority" with a question mark icon. It includes a search bar "Search by Name" and a table with the following data:

Figure 1 Click Revoke Delegation Button

This will navigate you to the “Revoke Delegation of Authority” screen where you will be able to revoke the delegation of authority. Click on the “Yes” button to revoke the delegation of authority.



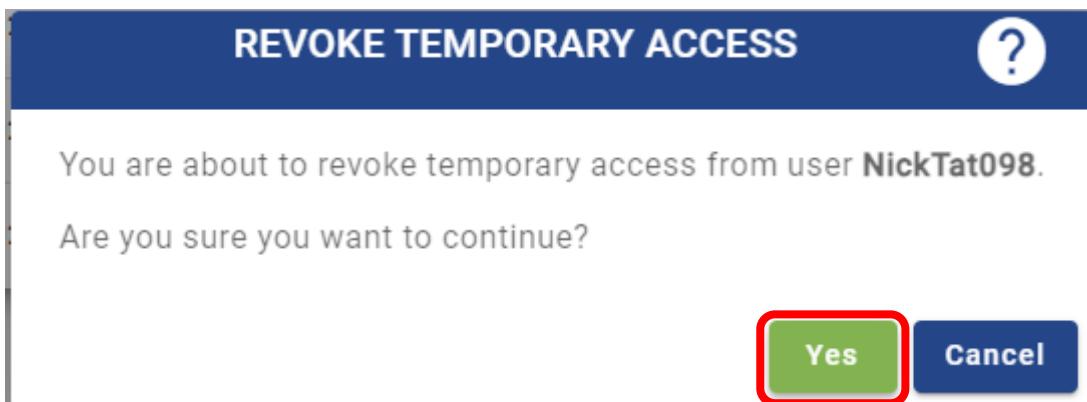


Figure 1 Click Yes Revoke Delegation Button

### Explanation of the Delegation of Authority statuses:

Delegating Party	Delegate	Start Date	End Date	Delegation Form	Status	Edit	Delete	Revoke Access
LeonCombrinck765	EmilWon098	22/08/2023	23/08/2023	<a href="#">Budget Variance Report (2).pdf</a>	Revoked			
ProcEmp098	ProcEmpEx098	26/08/2023	29/08/2023	<a href="#">Approved Vendor Report List.pdf</a>	Inactive			
FredMerc765	NickTat098	24/08/2023	31/08/2023	<a href="#">ApprovedVendorListReport (1).pdf</a>	Active			

Figure 1 Delegation Status

- **Inactive:** If the status is inactive that means that the delegation of authority is not yet activated. This could be due to the date of when the delegation of authority starts.
- **Active:** If the status is active that means that the delegation of authority is activated, and the authority of the Delegation Party can be temporarily accessed by the delegate.
- **Revoked:** If the status is revoked that means that the delegation of authority is revoked, and the delegation of authority has ended. This could be due to the time period being expired or that access has been revoked.



## Mandate Limit:

Create Mandate Limit, Edit Mandate Limit, and Delete Mandate Limit:

### Step 1 Navigate to Mandate Limit screen:

Navigate to the Mandate Limit Screen by clicking on the “Administration” button on the top navbar or on the “Administration” button on the home screen:

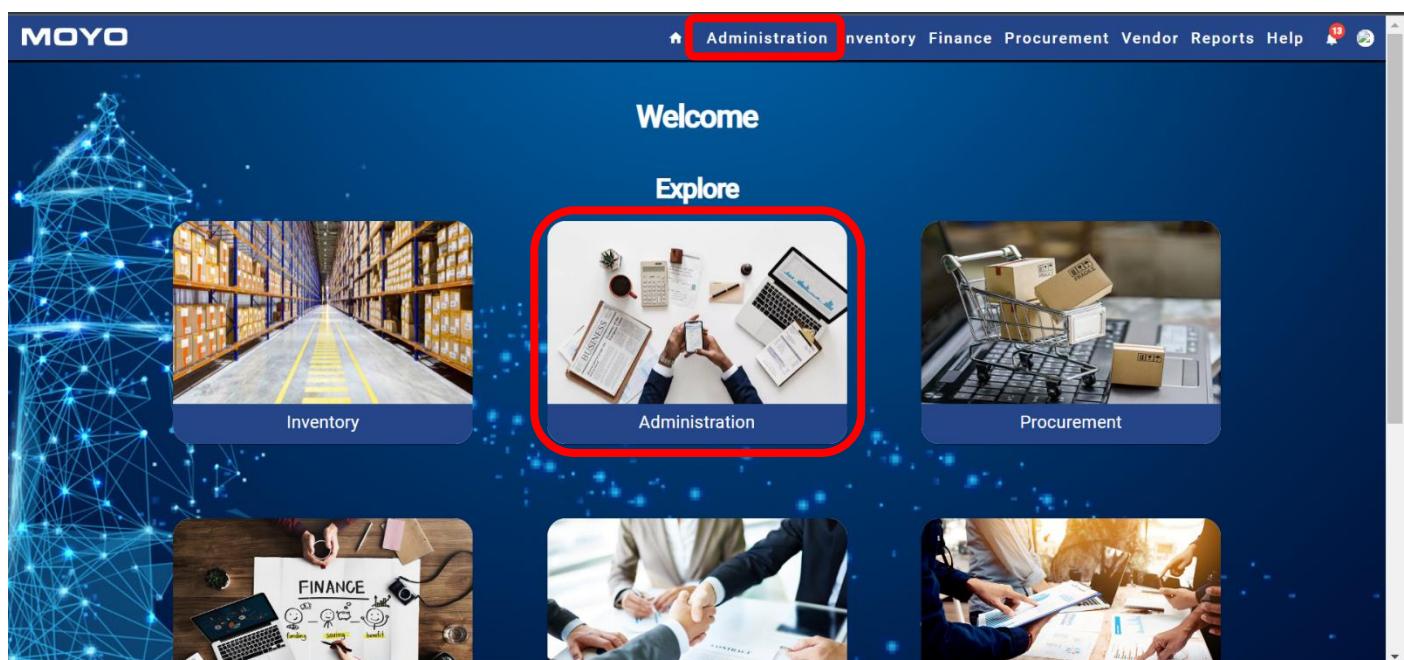


Figure 1 Home Screen to Mandate Limit Screen

Then Click on the “Mandate Limits” button on the administration side navbar:

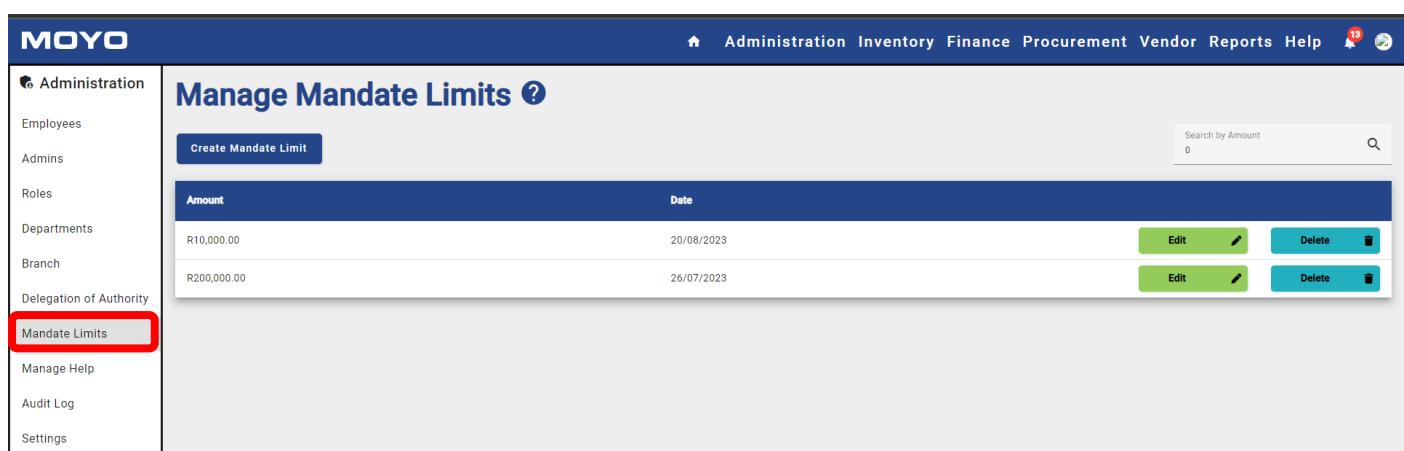


Figure 1 Administration side nav to Mandate Limit Screen



## Step 2 Create Mandate Limit:

Create a new mandate limit by clicking on the “Create Mandate Limit” button on the mandate limit screen:

The screenshot shows the MOYO software interface. The top navigation bar includes links for Administration, Inventory, Finance, Procurement, Vendor, Reports, Help, and a user icon with a '13' notification. On the left, a sidebar menu lists Administration, Employees, Admins, Roles, Departments, Branch, Delegation of Authority, Mandate Limits (which is selected), Manage Help, Audit Log, and Settings. The main content area is titled 'Manage Mandate Limits'. It features a table with two rows: one for R10,000.00 dated 20/08/2023 and another for R200,000.00 dated 26/07/2023. Each row has 'Edit' and 'Delete' buttons. At the top left of the table area, there is a red box around the 'Create Mandate Limit' button.

Figure 1 Click Create Mandate Limit Button

This will navigate you to the “Create Mandate Limit” screen where you will be able to create the new mandate limit. Click on the “Save” button to create the new mandate limit.

The screenshot shows the 'Create Mandate Limit' dialog box. It has fields for 'Amount (R)' containing '0' and 'Date' containing '07/05/2023'. At the bottom are 'Save' and 'Cancel' buttons, with 'Save' being highlighted by a red box.

Figure 1 Click Save Create Mandate Limit Button

1. **“Amount”**: Fill in the amount of the mandate limit. (Compulsory)
2. **“Date”**: Fill in the date of the mandate limit. (Compulsory)



### Step 3 Edit Mandate Limit:

Edit a mandate limit by clicking on the “Edit” button on the mandate limit screen within the mandate limit table: (The row you chose is the mandate limit you will be editing)

Amount	Date	Action
R10,000.00	20/08/2023	Edit
R200,000.00	26/07/2023	Edit

Figure 1 Click Edit Mandate Limit Button.

This will navigate you to the “Edit Mandate Limit” screen where you will be able to Edit the mandate limit. Click on the “Save” button to edit the mandate limit. (All Details are prefilled)

### Update Mandate Limit ?

Amount (R):	Date:
10000	20/08/2023

**Save**

**Cancel**

Figure 1 Click Save Edit Mandate Limit Button.

- “Amount”**: Change the amount of the mandate limit. (Not Compulsory)
- “Date”**: Change the date of the mandate limit. (Not Compulsory)



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## Step 4 Delete Mandate Limit:

Delete a mandate limit by clicking on the “Delete” button on the mandate limit screen within the mandate limit table: (The row you chose is the mandate limit you will be deleting)

Amount	Date	Edit	Delete
R10,000.00	20/08/2023		
R200,000.00	26/07/2023		

Figure 1 Click Delete Mandate Limit Button

This will navigate you to the “Delete Branch” screen where you will be able to delete the mandate limit. Click on the “Yes” button to delete the mandate limit.



Figure 1 Click Yes Delete Mandate Limit Button



## Audit Log:

Sort By:

### Step 1 Navigate to Audit Log screen:

Navigate to the Audit Log Screen by clicking on the “Administration” button on the top navbar or on the “Administration” button on the home screen:

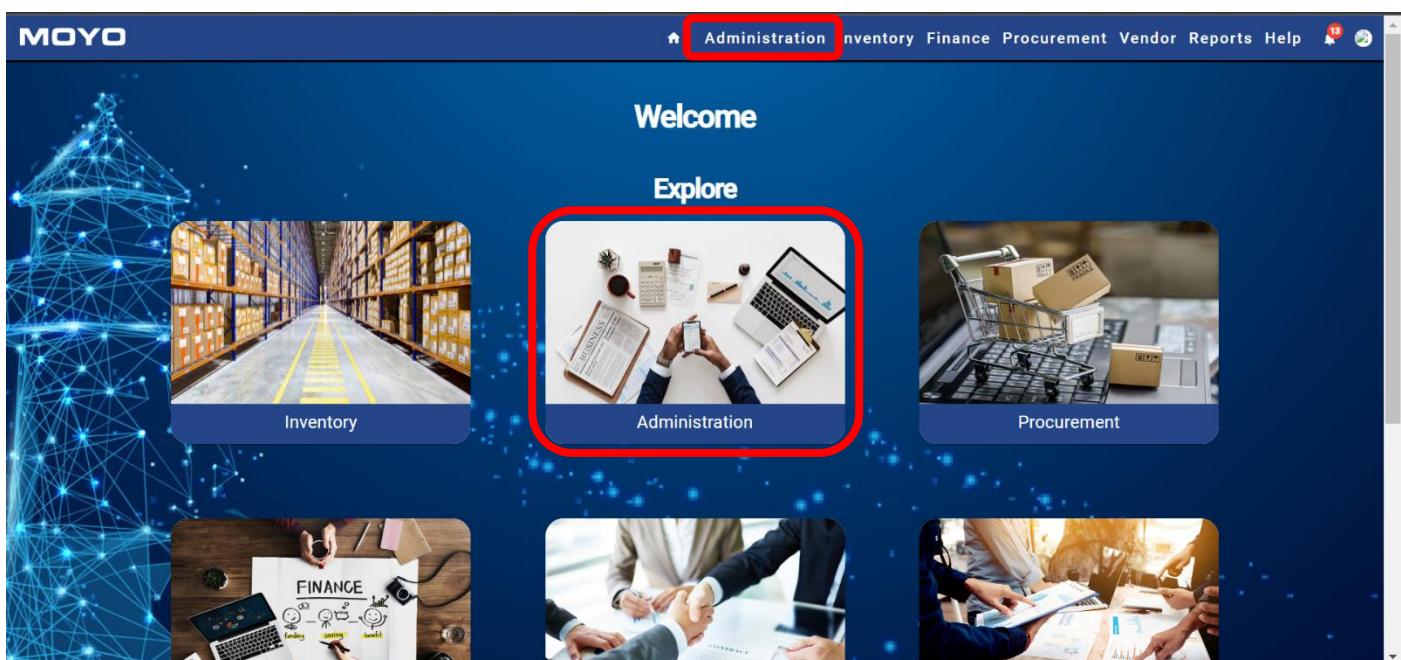


Figure 1 Home Screen to Audit Log Screen

Then Click on the “Audit Log” button on the administration side navbar:

The image shows the MOYO application's administration side navigation bar. The "Administration" link is highlighted with a red box. Under the "Administration" link, there are several sub-options: Employees, Admins, Roles, Departments, Branch, Delegation of Authority, Mandate Limits, Manage Help, and Audit Log. The "Audit Log" option is also highlighted with a red box. To the right of the sidebar, there is a main content area titled "View Audit Log" with a question mark icon. The content area displays a table of audit log entries. The table has columns for "Time Completed", "User", and "Action Taken". The entries are as follows:

Time Completed	User	Action Taken
2023/08/24 13:00:27	Admin	Exported Inventory Details
2023/08/24 12:52:23	Admin	Deleted Delegation: 2
2023/08/24 12:33:01	Admin	Logged in to the system
2023/08/24 12:26:39	Admin	Created Employee: Nick Tat
2023/08/24 12:25:48	Admin	Created Employee: Fred Merc

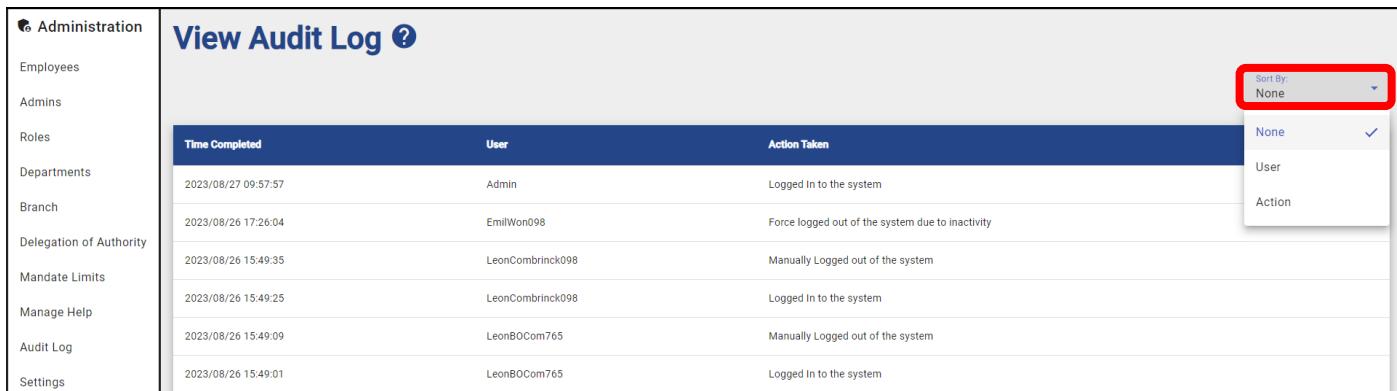
At the bottom right of the content area, there are buttons for "Items per page" (set to 5), "Sort By: None", and page navigation (1 - 5 of 135).

Figure 1 Administration side nav to Audit Log Screen



## Step 2 Sort By:

Click on the “Sort By” filter on the Audit log screen. This will allow you to sort the Audit Log table by “User” or by “Action”. This will sort the Audit log chronologically in the option you chose.



The screenshot shows the 'View Audit Log' page. On the left is a sidebar with links: Administration, Employees, Admins, Roles, Departments, Branch, Delegation of Authority, Mandate Limits, Manage Help, Audit Log, and Settings. The main area is titled 'View Audit Log' with a question mark icon. It contains a table with columns: Time Completed, User, and Action Taken. The table lists several audit entries. To the right of the table is a dropdown menu titled 'Sort By' with three options: None (selected), User, and Action. The 'User' and 'Action' options are preceded by a red rectangular box.

Time Completed	User	Action Taken
2023/08/27 09:57:57	Admin	Logged In to the system
2023/08/26 17:26:04	EmilWon098	Force Logged out of the system due to inactivity
2023/08/26 15:49:35	LeonCombrinck098	Manually Logged out of the system
2023/08/26 15:49:25	LeonCombrinck098	Logged In to the system
2023/08/26 15:49:09	LeonBOCom765	Manually Logged out of the system
2023/08/26 15:49:01	LeonBOCom765	Logged In to the system

Figure 1 Sort By Audit Log

- **"None"**: Sort the Audit log table by the time stamp with the newest audit at the top.
- **"User"**: Sort the Audit Log table by the User chronologically.
- **"Action"**: Sort the Audit Log table by the Action Taken chronologically.



## Settings:

Backup and Restore:

### Step 1 Navigate to Settings dropdown:

Navigate to the settings dropdown by clicking on the “Administration” button on the top navbar or on the “Administration” button on the home screen:

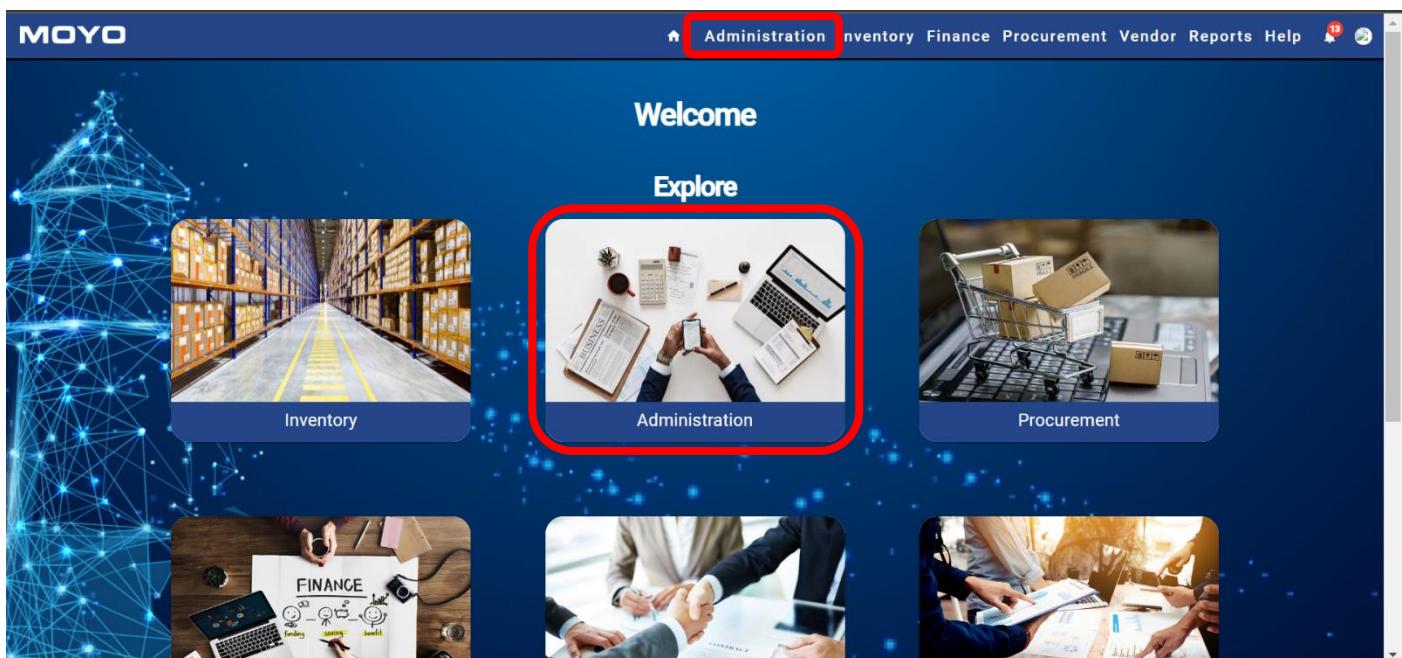


Figure 1 Home Screen to Settings Dropdown

Then Click on the “Settings” button on the administration side navbar:





Figure 1 Administration side nav to Settings Dropdown

## Step 2 Backup System:

Click on the Backup System button on the settings dropdown:



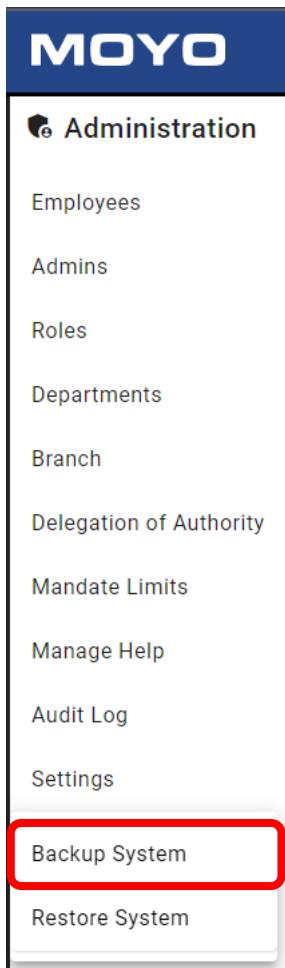


Figure 1 Administration side nav to Backup Dropdown

This will navigate you to the backup screen where you will be able to backup system data.  
Click on the “Yes” button to backup system data.

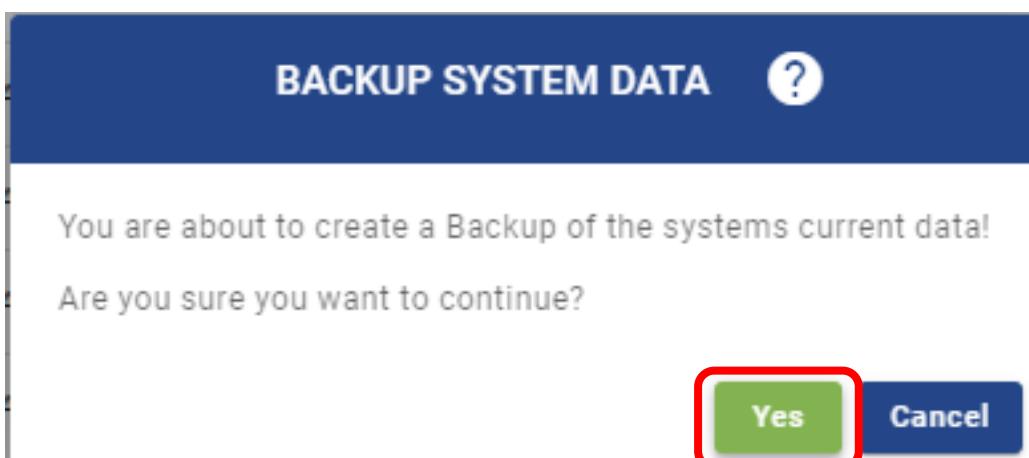


Figure 1 Backup System Screen



## Step 3 Restore System:

Click on the Restore System button on the settings dropdown:



Figure 1 Administration side nav to Restore Dropdown

This will navigate you to the restore screen where you will be able to restore system data.  
Click on the “Restore Database” button to restore system data.



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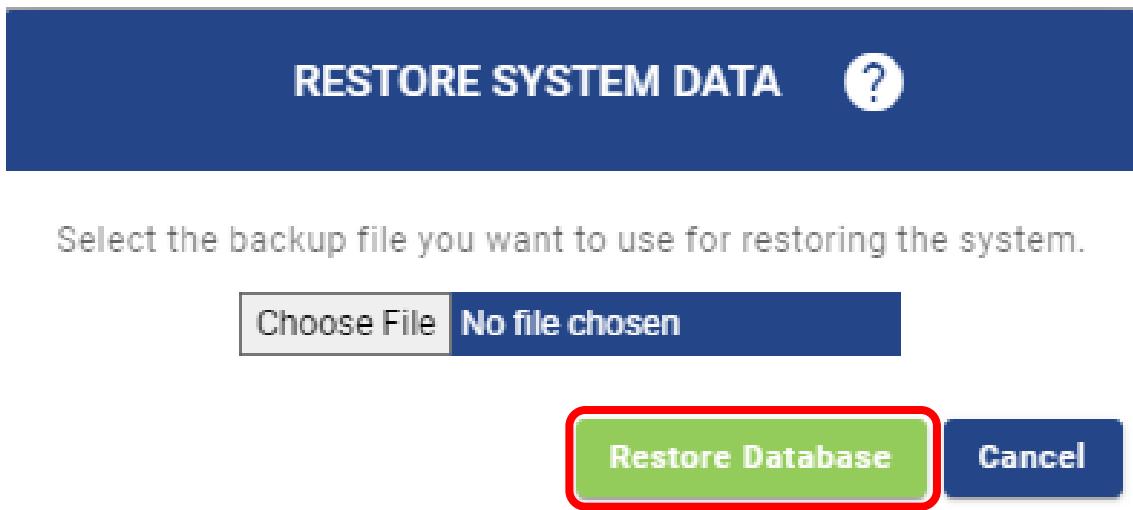


Figure 1 Restore System Screen

1. **Choose File**: Provide the Backed-up/Restore file of your choosing. (Compulsory and can only be .bak files)

# Inventory section

## Consumable:

Create Consumable, Export Details, Edit Consumable, Stock Consumable. and Delete Consumable:

### Step 1 Navigate to Consumable screen:

Navigate to the Consumable Screen by clicking on the “Inventory” button on the top navbar or on the “Inventory” button on the home screen:

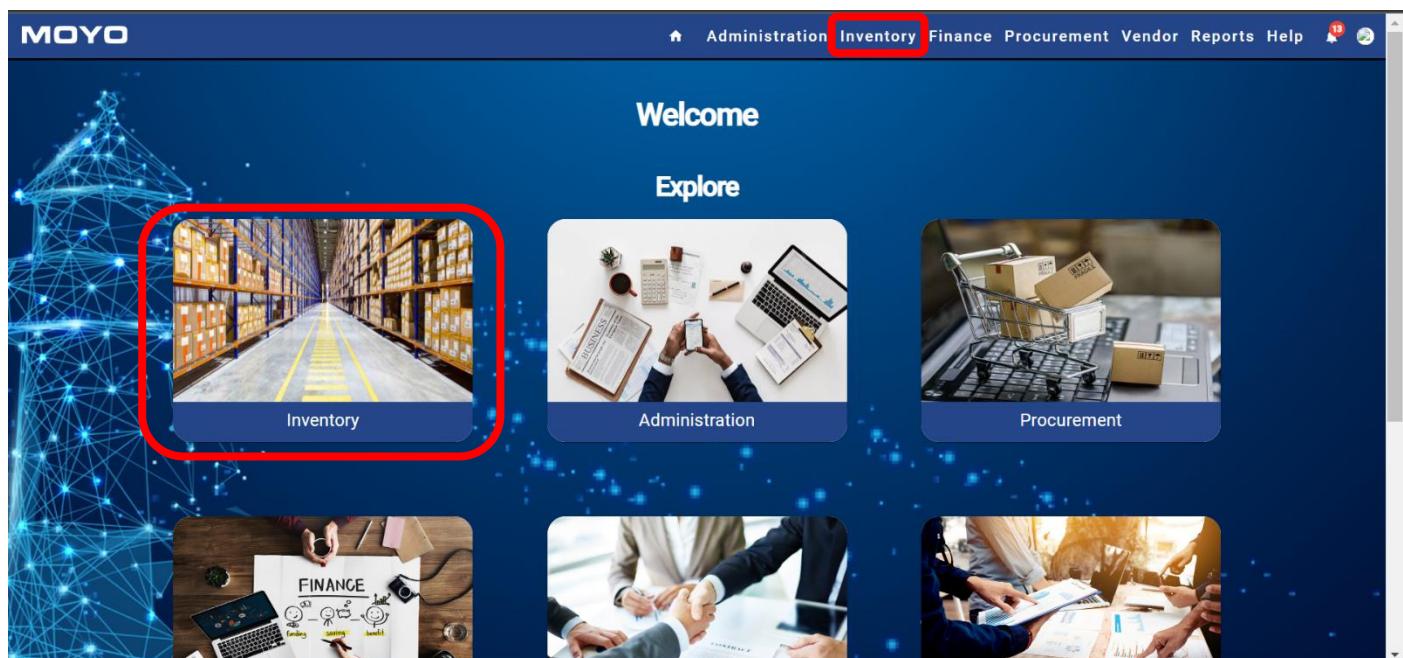


Figure 1 Home Screen to Consumable Screen.

Then Click on the “View Consumable” button on the Inventory side navbar:

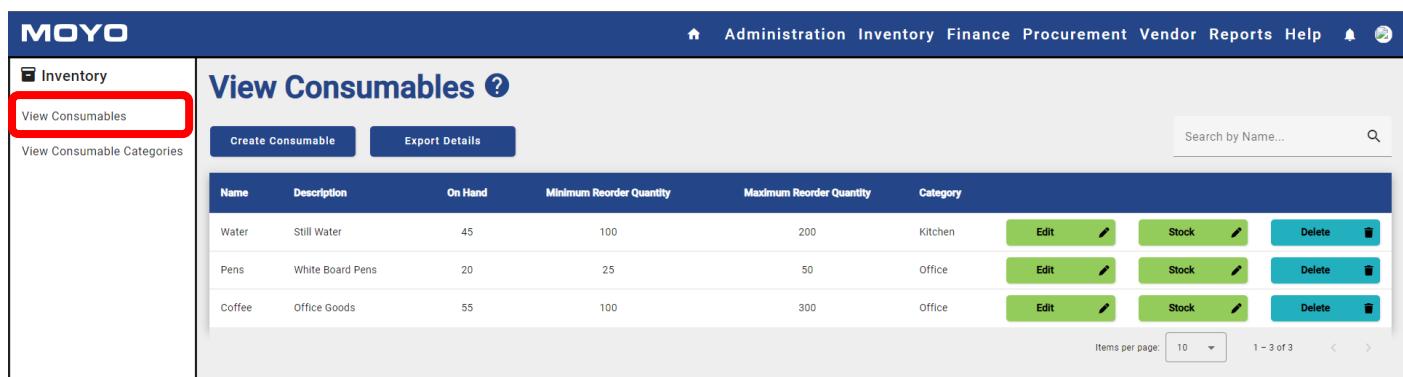


Figure 1 Inventory Side Nav to Consumable Screen.



## Step 2 Create Consumable:

Create a new consumable by clicking on the “Create Consumable” button on the view consumable screen:

The screenshot shows the MOYO software interface. The top navigation bar includes links for Administration, Inventory, Finance, Procurement, Vendor, Reports, Help, and a user icon. On the left, there's a sidebar with 'Inventory' options: 'View Consumables' and 'View Consumable Categories'. The main area is titled 'View Consumables' with a question mark icon. It features two buttons: 'Create Consumable' (highlighted with a red box) and 'Export Details'. Below these are three rows of consumable data with edit, stock, and delete buttons. A search bar and pagination controls are at the bottom.

Figure 1 Click Create Consumable Button.

This will navigate you to the “Create Consumable” screen where you will be able to create a new consumable. Fill in all the fields then click on the “Save” button to create a new Consumable.

The screenshot shows the 'Create Consumable' form. It has several input fields: 'Name' (Water), 'Category' (Select\*), 'Minimum Reorder Quantity' (0), 'Maximum Reorder Quantity' (0), 'On Hand' (0), and 'Description' (Still water). At the bottom are 'Save' and 'Cancel' buttons, with 'Save' highlighted with a red box.

Figure 1 Click Save Create Consumable Button.

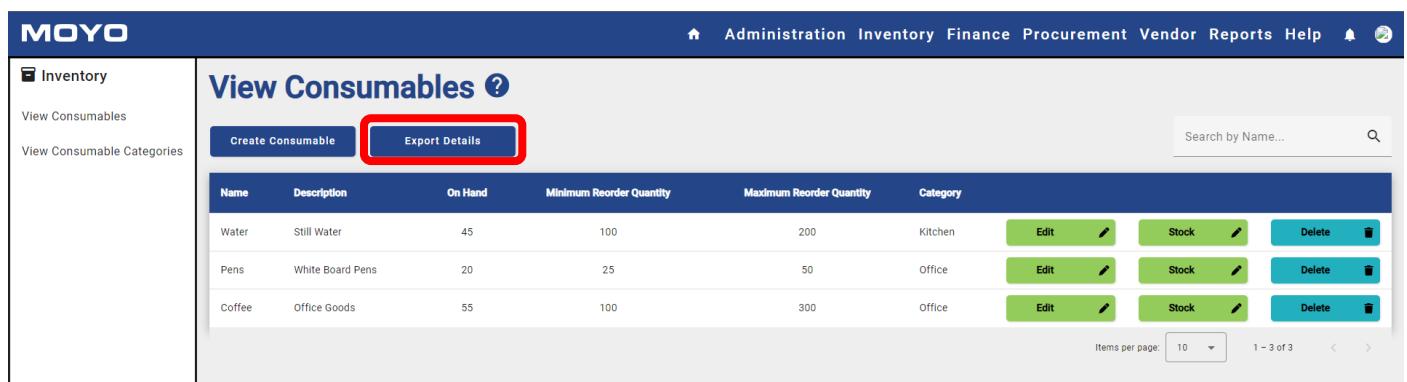
- 1. Name:** Fill in the name of the consumable you want to add. (Compulsory)



2. **Description**: Fill in the description of consumable you want to add. (Compulsory)
3. **category**: Choose in the consumable category of the consumable you want to add. (Compulsory)
4. **Minimum Reorder Quantity**: Fill in the minimum reorder quantity of the consumable you want to add. (Compulsory)
5. **Maximum Reorder Quantity**: Fill in the maximum reorder quantity of the consumable you want to add. (Compulsory)
6. **On Hand**: Fill in the stock of the consumable on hand of the consumable you want to add. (Compulsory)

### Step 3 Export Details:

Export the inventory details by clicking on the “Export Details” button on the Consumable screen.



The screenshot shows the MOYO software interface with a dark blue header bar. In the top right corner, there are navigation links: Administration, Inventory, Finance, Procurement, Vendor, Reports, Help, and a bell icon. Below the header, on the left, is a sidebar with 'Inventory' selected. Under 'Inventory', there are two options: 'View Consumables' and 'View Consumable Categories'. The main content area is titled 'View Consumables' with a question mark icon. It features a search bar at the top right labeled 'Search by Name...' with a magnifying glass icon. Below the search bar are two buttons: 'Create Consumable' and 'Export Details', with the 'Export Details' button being the one highlighted with a red box. The main table displays three rows of consumable data:

Name	Description	On Hand	Minimum Reorder Quantity	Maximum Reorder Quantity	Category	Edit	Stock	Delete
Water	Still Water	45	100	200	Kitchen			
Pens	White Board Pens	20	25	50	Office			
Coffee	Office Goods	55	100	300	Office			

At the bottom right of the table, there are buttons for 'Items per page:' (set to 10), '1 - 3 of 3', and navigation arrows. The entire screenshot has a light gray background.

Figure 1 Click Edit Mandate Limit Button.

This will generate a Consumable Inventory Details list report with all the Inventory details and display the report in a new tab for you to view and download.





Driving Significance Together

## Consumable Inventory Details Report

Generated On: 08/24/2023  
Generated By: Admin

### Details Per Consumable Item

Name	Category	Minimum Reorder- Quantity	Maximum Reorder- Quantity	On-Hand
Water	Kitchen	100	200	45
Pens	Office	25	50	20
Coffee	Office	100	300	55

\*\*End of Report\*\*

Figure 1 Consumable Inventory Details Report.

### Step 4 Edit Consumable:

Edit a Consumable by clicking on the “Edit” button on the Consumable screen within the Consumable table: (The row you chose is the Consumable you will be editing)

Name	Description	On Hand	Minimum Reorder Quantity	Maximum Reorder Quantity	Category	Action
Water	Still Water	45	100	200	Kitchen	<span style="border: 2px solid red; padding: 2px;">Edit</span>
Pens	White Board Pens	20	25	50	Office	<span>Edit</span>
Coffee	Office Goods	55	100	300	Office	<span>Edit</span>

Figure 1 Click Edit Mandate Limit Button.



This will navigate you to the “Edit Consumable” screen where you will be able to Edit the Consumable. Click on the “Update Stock” button to edit the Consumable. (All Details are prefilled)

## Edit Consumable ?

Name:	Category:
Water	Select*
Not more than 32 characters long.	
Minimum Reorder Quantity:	Maximum Reorder Quantity:
100	300
On Hand:	
55	
Description:	
Still Water	
Not more than 50 characters long.	
<b>Save</b>	<b>Cancel</b>

Figure 1 Click Update Stock Edit Consumable Button.

1. **Name**: change the name of the consumable. (Not Compulsory)
2. **Description**: change the description of consumable. (Not Compulsory)
3. **category**: Change in the consumable category of the consumable. (Not Compulsory)
4. **Minimum Reorder Quantity**: Change the minimum reorder quantity of the consumable. (Not Compulsory)
5. **Maximum Reorder Quantity**: Change the maximum reorder quantity of the consumable. (Not Compulsory)
6. **On Hand**: Prefilled on hand and cannot be changed on this screen. (Navigate to Update Stock screen if you want to edit the on hand amount)



## Step 5 Stock Consumable:

Update stock and view predictions of a Consumable by clicking on the “Stock” button on the Consumable screen within the Consumable table: (The row you chose is the Consumable you will be updating)

Name	Description	On Hand	Minimum Reorder Quantity	Maximum Reorder Quantity	Category	Edit	Stock	Delete
Water	Still Water	45	100	200	Kitchen	<button>Edit</button>	<button>Stock</button>	<button>Delete</button>
Pens	White Board Pens	20	25	50	Office	<button>Edit</button>	<button>Stock</button>	<button>Delete</button>
Coffee	Office Goods	55	100	300	Office	<button>Edit</button>	<button>Stock</button>	<button>Delete</button>

Figure 1 Click Stock Consumable Button

This will navigate you to the “Update Stock” screen by clicking on the “Update Stock” tab. There you will be able to update the Consumable stock on hand. Click on the “Update Stock” button to update the stock on hand.

Update Stock

View Predictions

Update Coffee stock level

Please enter the stock level for the relevant consumable **Coffee**:

0

Update Stock      Close

Figure 1 Click Update Stock on hand Consumable Button

1. **“On Hand”:** Fill in the stock on hand after you have made a stock count of the consumable. (This will update the stock on hand and make it possible to view predictions for the consumable)



Then navigate you to the “View Prediction” screen by clicking on the “View Prediction” tab. There you will be able to view predictions of the Consumable. (This will help with prediction how much stock of the consumable you should buy in the future for each month)

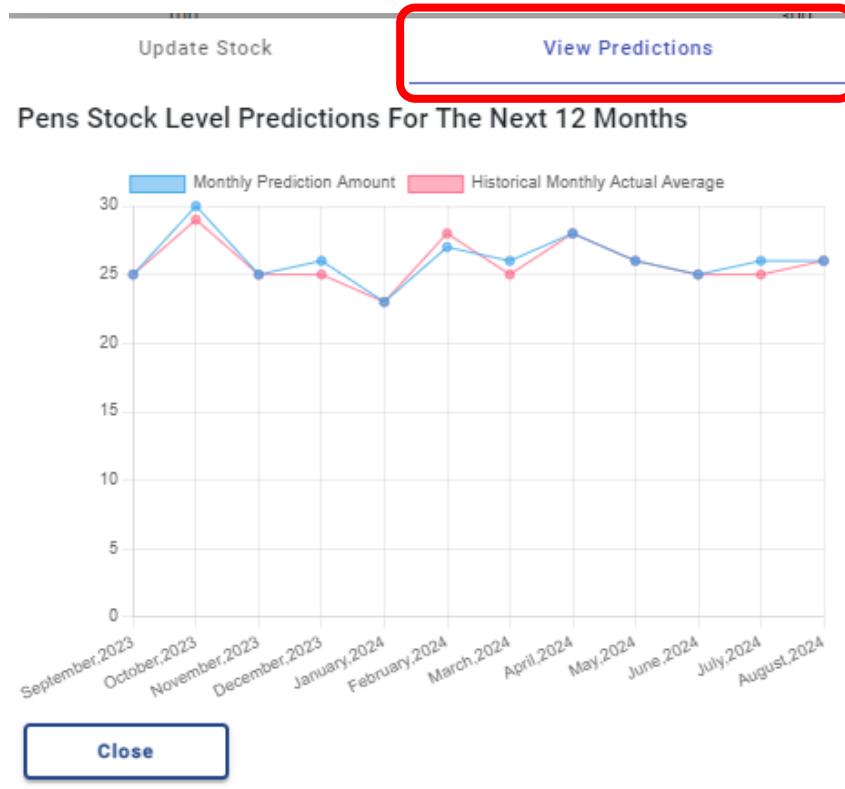


Figure 1 Click View Prediction Consumable Button

## Step 6 Delete Consumable:

Delete a Consumable by clicking on the “Delete” button on the Consumable screen within the Consumable table: (The row you chose is the Consumable you will be deleting)



Name	Description	On Hand	Minimum Reorder Quantity	Maximum Reorder Quantity	Category	Edit	Stock	Delete
Water	Still Water	45	100	200	Kitchen			
Pens	White Board Pens	20	25	50	Office			
Coffee	Office Goods	55	100	300	Office			

Figure 1 Click Delete Consumable Button

This will navigate you to the “Delete Consumable” screen where you will be able to delete the Consumable. Click on the “Yes” button to delete the Consumable.

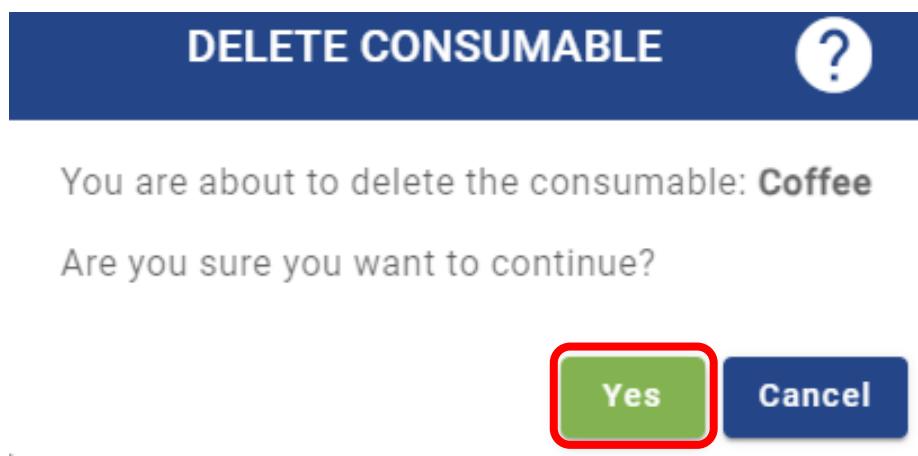


Figure 1 Click Yes Delete Consumable Button

## Consumable Category:

Create Consumable Category, Edit Consumable Category, and Delete Consumable Category:

### Step 1 Navigate to Consumable Category screen:

Navigate to the Consumable Category Screen by clicking on the “Inventory” button on the top navbar or on the “Inventory” button on the home screen:

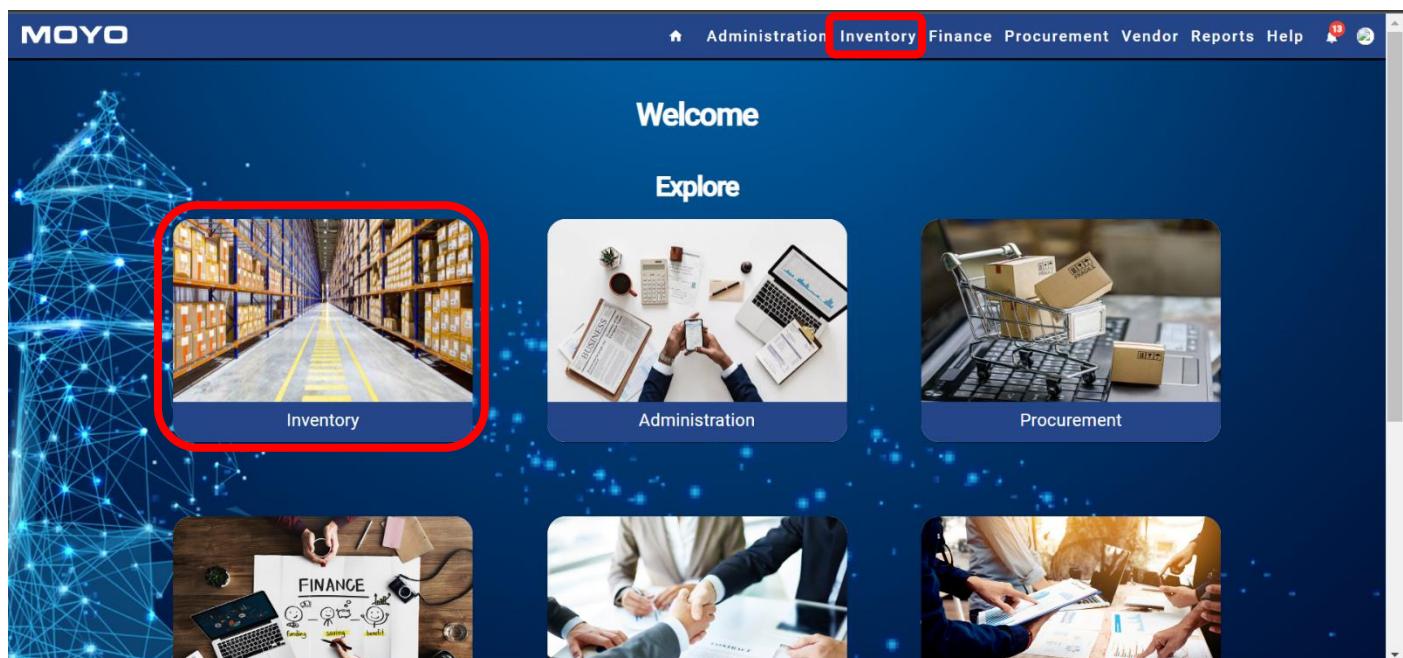


Figure 1 Home Screen to Consumable Category Screen

Then Click on the “View Consumable Category” button on the inventory side navbar:

The image shows the MOYO application's inventory side navigation bar. It includes links for "Inventory" (highlighted with a red box), "View Consumables", and "View Consumable Categories". The main content area is titled "View Consumable Categories" and contains a "Create Category" button, a search bar, and a table listing two categories: "Kitchen" (Description: Mykitchen) and "Office" (Description: Office Supplies). There are "Edit" and "Delete" buttons for each row.

Figure 1 Inventory side nav to Consumable Category Screen



## Step 2 Create Consumable Category:

Create a new Consumable Category by clicking on the “Create Category” button on the Consumable Category screen:

The screenshot shows the MOYO software interface. The top navigation bar includes links for Administration, Inventory, Finance, Procurement, Vendor, Reports, Help, and a user icon. On the left, a sidebar menu has 'Inventory' selected, with options for 'View Consumables' and 'View Consumable Categories'. The main content area is titled 'View Consumable Categories' with a question mark icon. A red box highlights the 'Create Category' button. Below it is a table with two rows of data: 'Kitchen' with 'Mykitchen' in the description, and 'Office' with 'Office Supplies' in the description. Each row has 'Edit' and 'Delete' buttons. At the bottom right, there are pagination controls for 'Items per page: 10' and '1 - 2 of 2'.

Figure 1 Click Create Consumable Category Button

This will navigate you to the “Create Consumable Category” screen where you will be able to create the new Consumable Category. Click on the “Save” button to create the new Consumable Category.

## Create Consumable Category ?

Name:

Not more than 32 characters long.

Description:

Not more than 50 characters long.

Save

Cancel

Figure 1 Click Save Create Consumable Category Button

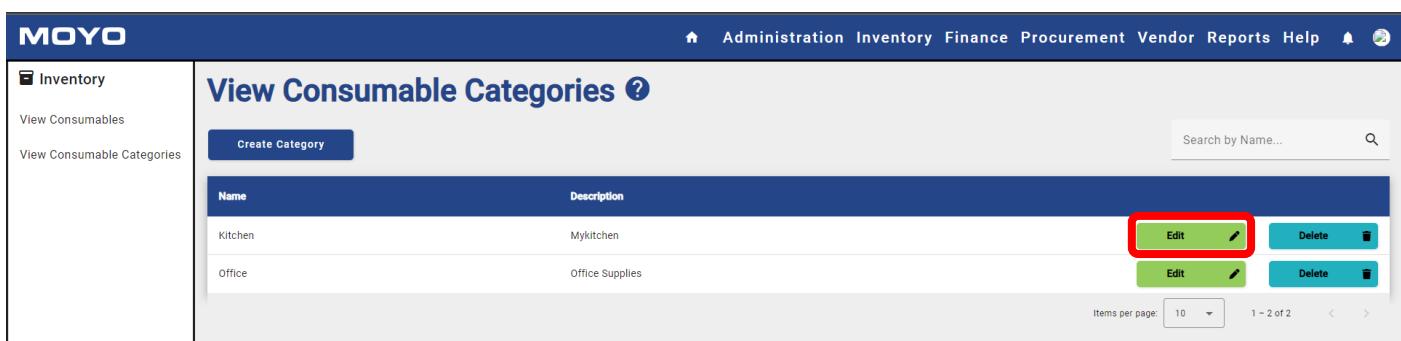
1. Name: Fill in the name of the Consumable Category. (Compulsory)



2. Description: Fill in the description of the Consumable Category. (Compulsory)

### Step 3 Edit Consumable Category:

Edit a Consumable Category by clicking on the “Edit” button on the Consumable Category screen within the Consumable Category table: (The row you chose is the Consumable Category you will be editing)



Name	Description	Actions
Kitchen	Mykitchen	<button>Edit</button> <button>Delete</button>
Office	Office Supplies	<button>Edit</button> <button>Delete</button>

Figure 1 Click Edit Consumable Category Button.

This will navigate you to the “Edit Consumable Category” screen where you will be able to Edit the Consumable Category. Click on the “Save” button to edit the Consumable Category. (All Details are prefilled)



## Edit Consumable Category ?

Name:

Not more than 32 characters long.

Description:

Not more than 50 characters long.

SaveCancel

Figure 1 Click Save Edit Consumable Category Button.

3. **Name**: Change the name of the Consumable Category. (Not Compulsory)
4. **Description**: Change the description of the Consumable Category. (Not Compulsory)

### Step 4 Delete Consumable Category:

Delete a Consumable Category by clicking on the “Delete” button on the Consumable Category screen within the Consumable Category table: (The row you chose is the Consumable Category you will be deleting)

View Consumable Categories ?		
<a href="#">Create Category</a>		
Name	Description	Actions
Kitchen	Mykitchen	<a href="#">Edit</a> <a href="#">Delete</a>
Office	Office Supplies	<a href="#">Edit</a> <a href="#">Delete</a>

Figure 1 Click Delete Consumable Category Button



This will navigate you to the “Delete Consumable Category” screen where you will be able to delete the Consumable Category. Click on the “Yes” button to delete the Consumable Category.

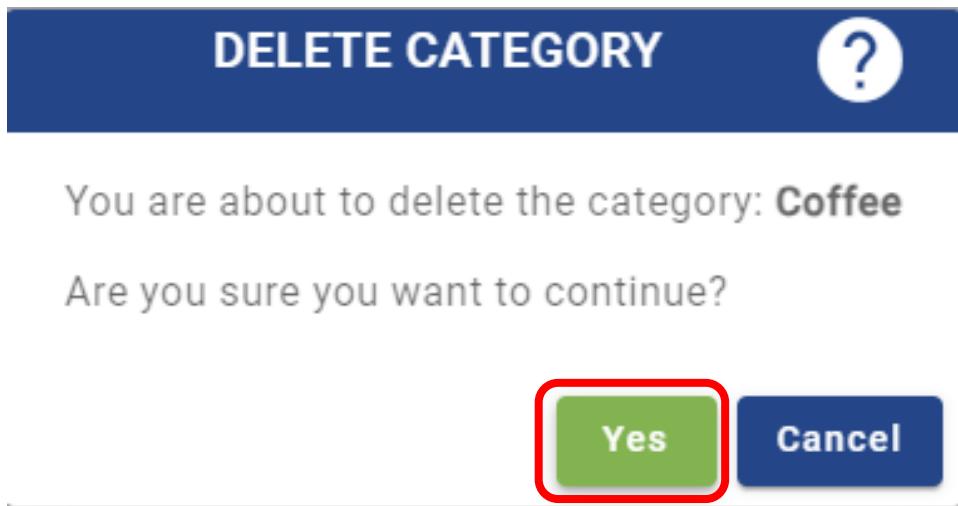


Figure 1 Click Yes Delete Consumable Category Button



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MOYO

# Finance Section

## Budget category:

Create Budget Category, Edit Budget Category, and Delete Budget Category:

Step 1 Navigate to Budget Category screen:

Navigate to the Budget Category Screen by clicking on the “Finance” button on the top navbar or on the “Finance” button on the home screen:

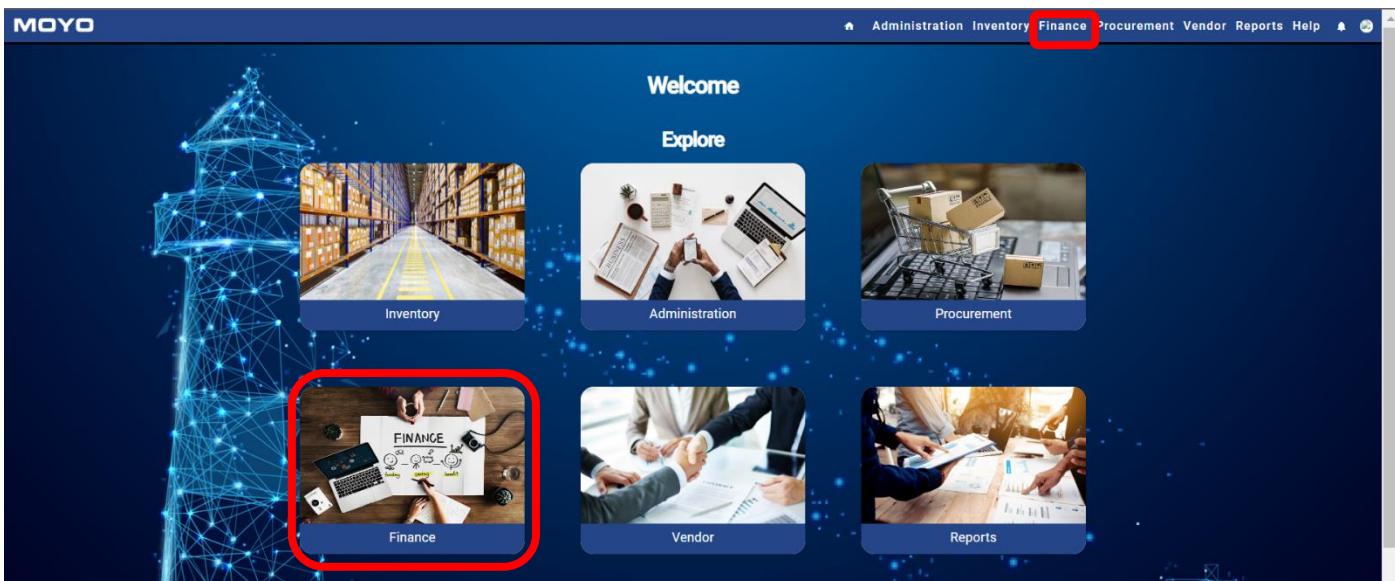


Figure 1 Home Screen to Budget Category Screen

Then Click on the “Budget Category” button on the Finance side navbar:

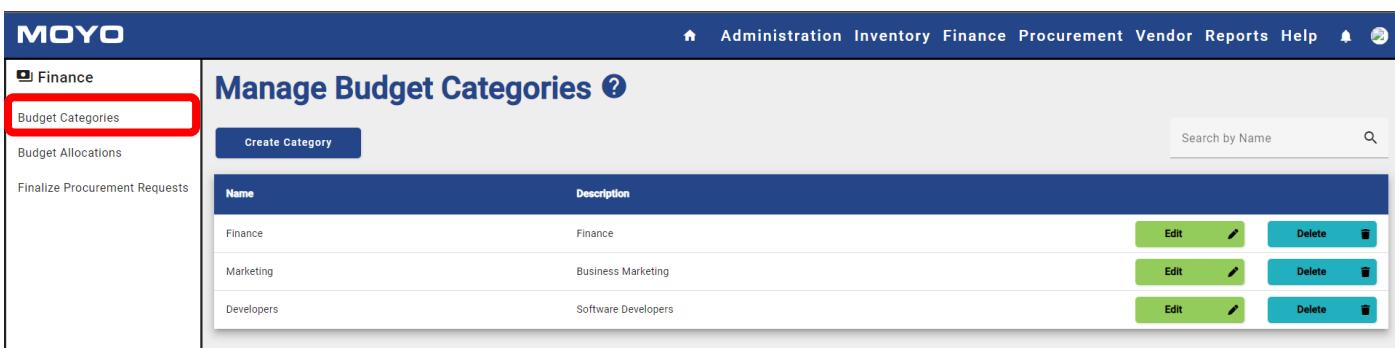


Figure 1 Finance side nav to Budget Category Screen



## Step 2 Create Budget Category:

Create a new Budget Category by clicking on the “Create Category” button on the Budget Category screen:

The screenshot shows the MOYO software interface. On the left, there is a sidebar with links: 'Finance' (selected), 'Budget Categories', 'Budget Allocations', and 'Finalize Procurement Requests'. The main area is titled 'Manage Budget Categories ?'. In the center, there is a table with three rows: 'Finance' (Description: Finance), 'Marketing' (Description: Business Marketing), and 'Developers' (Description: Software Developers). Each row has 'Edit' and 'Delete' buttons. At the top of the main area, there is a search bar labeled 'Search by Name' and a magnifying glass icon. Below the table, a red box highlights the 'Create Category' button.

Figure 1 Click Create Budget Category Button

This will navigate you to the “Create Budget Category” screen where you will be able to create the new Budget Category. Click on the “Save” button to create the new Budget Category.

## Create Budget Category?

Name:

Not more than 150 characters long.

Account Code:

Not more than 9 characters long (incl. point or comma).

Description:

Not more than 200 characters long.

Save

Cancel

Figure 1 Click Save Create Budget Category Button

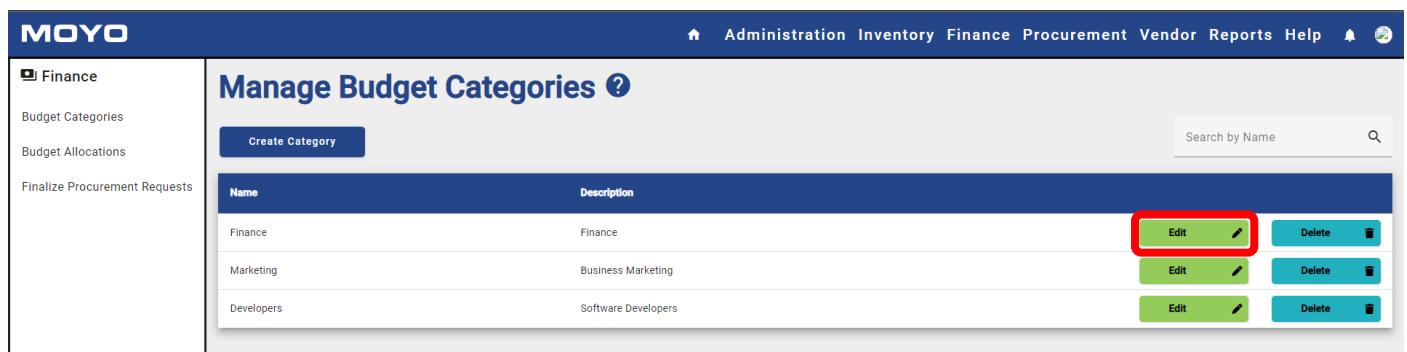
1. “Name”: Fill in the name of the Budget Category. (Compulsory)



2. **“Account Code”:** Fill in the account code of the Budget Category. (Compulsory)
3. **“Description”:** Fill in the description of the Budget Category. (Compulsory)

### Step 3 Edit Budget Category:

Edit a Budget Category by clicking on the “Edit” button on the Budget Category screen within the Budget Category table: (The row you chose is the Budget Category you will be editing)



Name	Description	Edit	Delete
Finance	Finance		
Marketing	Business Marketing		
Developers	Software Developers		

Figure 1 Click Edit Budget Category Button.

This will navigate you to the “Edit Budget Category” screen where you will be able to Edit the Budget Category. Click on the “Save” button to edit the Budget Category. (All Details are prefilled)



## Edit Budget Category?

Name:

Not more than 150 characters long.

Account Code:

Not more than 9 characters long  
(incl. point or comma).

Description:

Not more than 200 characters long.

**Save** **Cancel**

Figure 1 Click Save Edit Budget Category Button.

- “Name”**: Change the name of the Budget Category. (Not Compulsory)
- “Account Code”**: Change the account code of the Budget Category. (Compulsory)
- “Description”**: Change the description of the Budget Category. (Not Compulsory)

### Step 4 Delete Budget Category:

Delete a Budget Category by clicking on the “Delete” button on the Budget Category screen within the Budget Category table: (The row you chose is the Budget Category you will be deleting)



Name	Description	Edit	Delete
Finance	Finance		
Marketing	Business Marketing		
Developers	Software Developers		

Figure 1 Click Delete Budget Category Button

This will navigate you to the “Delete Budget Category” screen where you will be able to delete the Budget Category. Click on the “Yes” button to delete the Budget Category.

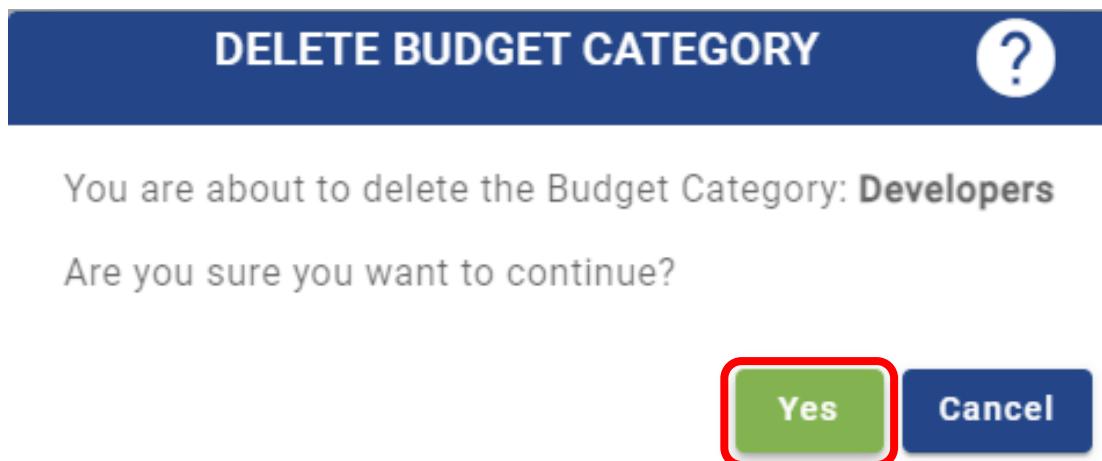


Figure 1 Click Yes Delete Budget Category Button

## Budget Allocation:

Create Budget Allocation, import from Excel, View Budget lines, Export to Excel, Edit Budget Allocation, and Delete Budget Allocation:

### Step 1 Navigate to Budget Allocation screen:

Navigate to the Budget Allocation Screen by clicking on the “Finance” button on the top navbar or on the “Finance” button on the home screen:

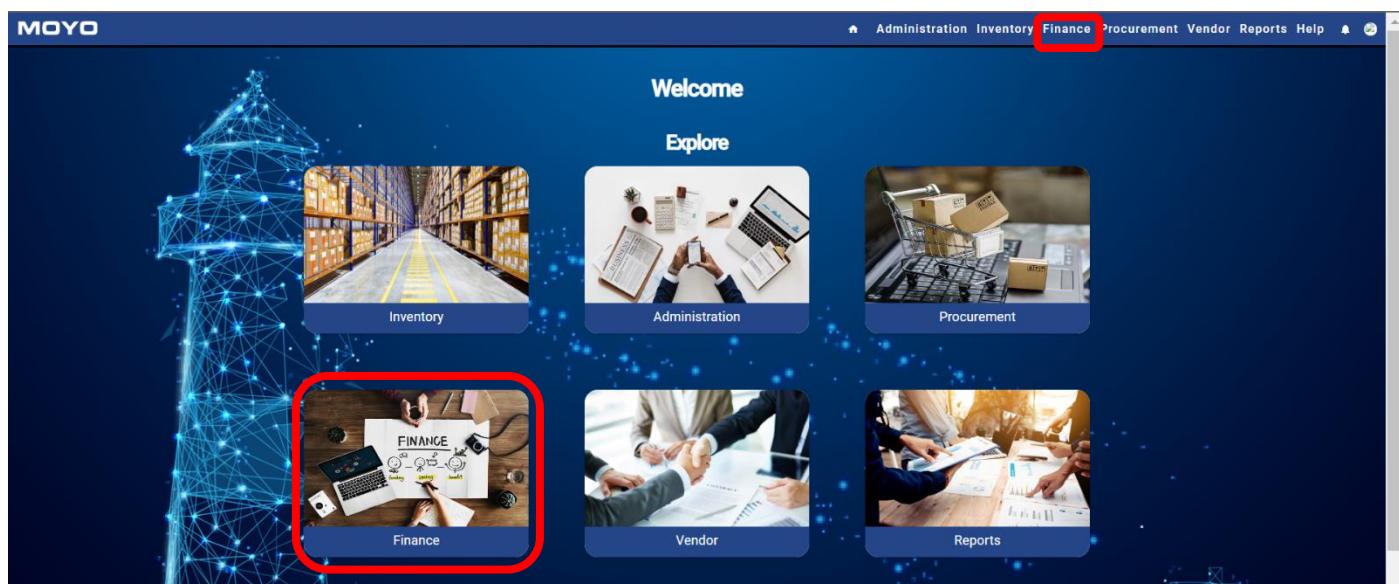


Figure 1 Home Screen to Budget Allocation Screen

Then Click on the “Budget Allocation” button on the Finance side navbar:

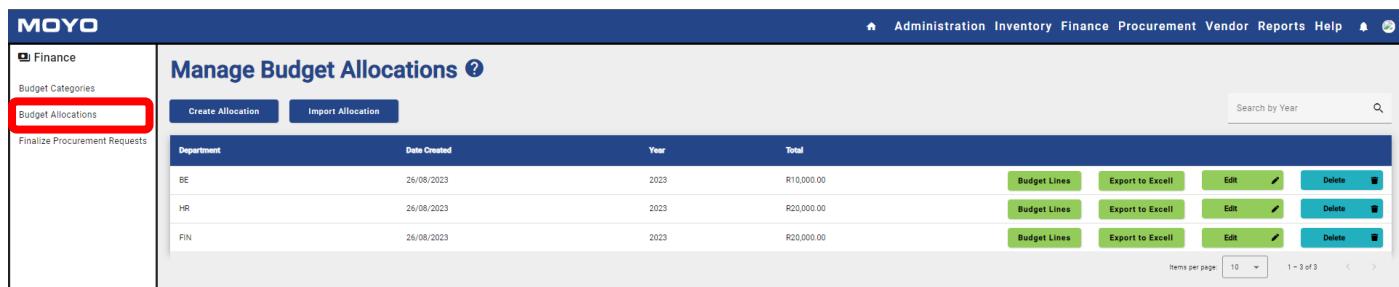
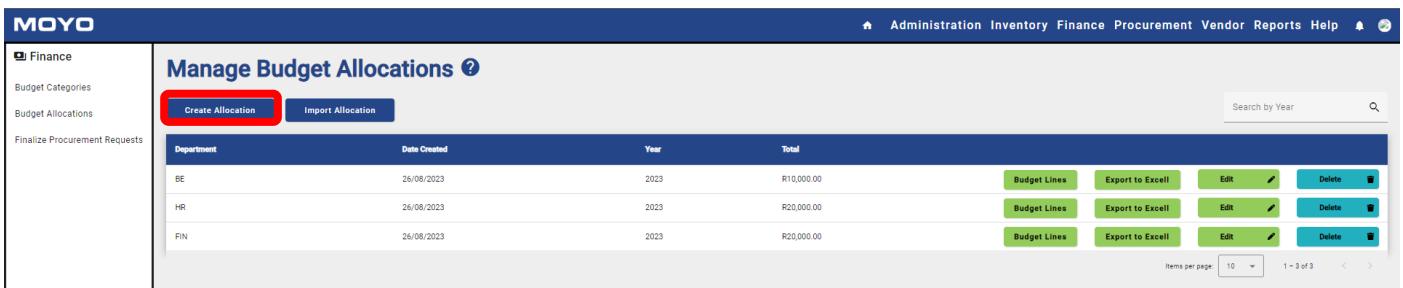


Figure 1 Finance side nav to Budget Allocation Screen



## Step 2 Create Budget Allocation:

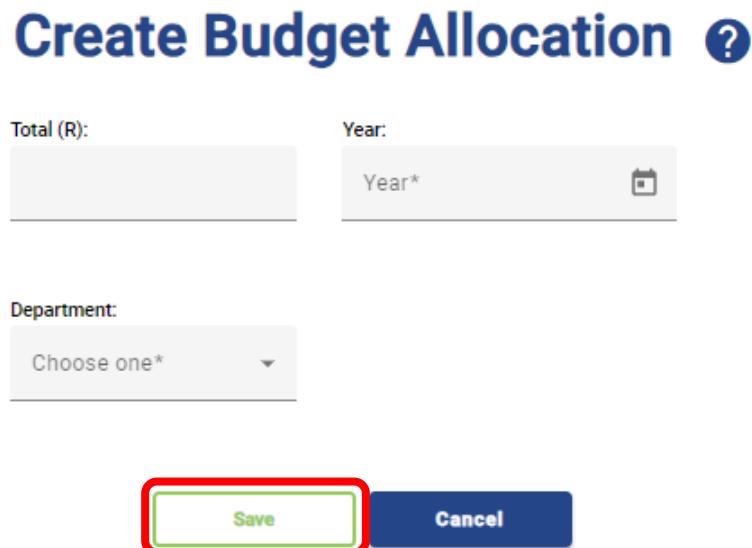
Create a new Budget Allocation by clicking on the “Create Allocation” button on the Budget Allocation screen:



The screenshot shows the MOYO software interface with a sidebar on the left containing links for Finance, Budget Categories, Budget Allocations, and Finalize Procurement Requests. The main area is titled "Manage Budget Allocations" and displays a table of existing budget allocations. The table has columns for Department (BE, HR, FIN), Date Created (26/08/2023), Year (2023), Total (R10,000.00, R20,000.00, R20,000.00), and actions (Budget Lines, Export to Excel, Edit, Delete). A red box highlights the "Create Allocation" button at the top left of the table area.

Figure 1 Click Create Budget Allocation Button

This will navigate you to the “Create Budget Allocation” screen where you will be able to create the new Budget Allocation. Click on the “Save” button to create the new Budget Allocation.



The screenshot shows the "Create Budget Allocation" form. It includes fields for "Total (R)" (with a placeholder "0.00"), "Year" (with a date picker icon), "Department" (a dropdown menu with "Choose one\*" placeholder), and two buttons at the bottom: "Save" (highlighted with a red box) and "Cancel".

Figure 1 Click Save Create Budget Allocation Button

1. **Total**: Fill in the total of the Budget Allocation. (Compulsory)
2. **Year**: Fill in the year of the Budget Allocation using a year date picker. (Compulsory)
3. **Department**: Choose the department from the list of departments for the Budget Allocation. (Compulsory)



## Step 5 Import form Excel:

click the “Import Allocation” to import the excel file into the Budget Allocation and Budget Lines for that allocation:

Department	Date Created	Year	Total	Budget Lines	Export to Excel	Edit	Delete
BE	26/08/2023	2023	R10,000.00	<a href="#">Budget Lines</a>	<a href="#">Export to Excel</a>	<a href="#">Edit</a>	<a href="#">Delete</a>
HR	26/08/2023	2023	R20,000.00	<a href="#">Budget Lines</a>	<a href="#">Export to Excel</a>	<a href="#">Edit</a>	<a href="#">Delete</a>
FIN	26/08/2023	2023	R20,000.00	<a href="#">Budget Lines</a>	<a href="#">Export to Excel</a>	<a href="#">Edit</a>	<a href="#">Delete</a>

Figure 1 Click Import Allocation Button

This will navigate you to the “Import Budget Allocation” screen where you will be able to import the excel file into the system. (\*Note Ensure the format of the import budget allocation excel file is the same format as the Export to Excel file see “export to excel” for example. The Department and Budget Category in the Excel file you want to import must already be existing departments and budget categories on the system)

Figure 1 Import Budget Allocation Screen

1. “Allocation to Upload”: Provide the excel file you want to import onto the system.  
(Compulsory)



## Step 4 View Budget Line for a Budget Allocation:

View the Budget Line by clicking on the “Budget Lines” button on the Budget Allocation screen:

Department	Date Created	Year	Total	Budget Lines	Export to Excel	Edit	Delete
BE	26/08/2023	2023	R10,000.00	<a href="#">Budget Lines</a>	<a href="#">Export to Excel</a>	<a href="#">Edit</a>	<a href="#">Delete</a>
HR	26/08/2023	2023	R20,000.00	<a href="#">Budget Lines</a>	<a href="#">Export to Excel</a>	<a href="#">Edit</a>	<a href="#">Delete</a>
FIN	26/08/2023	2023	R20,000.00	<a href="#">Budget Lines</a>	<a href="#">Export to Excel</a>	<a href="#">Edit</a>	<a href="#">Delete</a>

Figure 1 Click View Budget Line Button

This will navigate you to the “Budget Line” screen where you will be able to create a new Budget Line, edit a Budget Line, and delete a Budget Line. (More Information provided about budget line in the Budget line section)

Category	Month	Budgeted	Actual	Variance	Sort By: None	Search by Category
Entertainment	February	R10,000.00	R7,500.00	R2,500.00	<a href="#">Edit</a>	<a href="#">Delete</a>
Technology	February	R2,000.00	R2,000.00	R0.00	<a href="#">Edit</a>	<a href="#">Delete</a>
Marketing	February	R300.00	R300.00	R0.00	<a href="#">Edit</a>	<a href="#">Delete</a>

Figure 1 Budget Line Screen

## Step 5 Export to Excel:

click the “Export to Excel” to export the Budget Allocation with the Budget Lines for that allocation into a excel file:

Department	Date Created	Year	Total	Budget Lines	Export to Excel	Edit	Delete
BE	26/08/2023	2023	R10,000.00	<button>Budget Lines</button>	<button>Export to Excel</button>	<button>Edit</button>	<button>Delete</button>
HR	26/08/2023	2023	R20,000.00	<button>Budget Lines</button>	<button>Export to Excel</button>	<button>Edit</button>	<button>Delete</button>
FIN	26/08/2023	2023	R20,000.00	<button>Budget Lines</button>	<button>Export to Excel</button>	<button>Edit</button>	<button>Delete</button>

Figure 1 Click Export to Excel Button

This will navigate you to the “Export to Excel” screen. There you will be able to select the month you want to export the Click the “Export” button to export the Budget Allocation with its respective Budget Lines of the Month you chose.

SELECT FILTER CRITERIA ?

Please provide the following details:

Export Specific Month?

Month:

Select One

**Export**      Cancel

Figure 1 Click Export Button

- 1. “Month”:** Choose the Month from the list of all the months in the year January-December. (Compulsory)



This will download a excel file on your device with the Budget Allocation and Budget Lines for that allocation in the excel file.

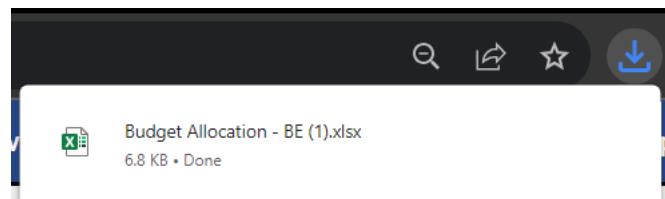


Figure 1 Download Excel File

Here is an Example of the Export Excel file format.

	A	B	C	D	E	F
1	Department: Finance Department					
2	FY: 2023					
3						
4		Budgeted Total	Actual Total	Variance		
5	Total Expenses:	R 30 000,00	R 24 700,00	R 5 300,00		
6						
7	Account Name	Account Code	Month	Budgeted Amount	Actual Amount	Actual Variance
8	Finance	638264	August	R 25 000,00	R 24 690,00	R 310
9	Business Marketing	53563	August	R 300,00	R 10,00	R 290
10						

Figure 1 Export Excel File Format

## Step 6 Edit Budget Allocation:

Edit a Budget Allocation by clicking on the “Edit” button on the Budget Allocation screen within the Budget Allocation table: (The row you chose is the Budget Allocation you will be editing)

The screenshot shows a software interface titled "Manage Budget Allocations". On the left, there's a sidebar with links like "Finance", "Budget Categories", "Budget Allocations", and "Finalize Procurement Requests". The main area has a table with columns: "Department", "Date Created", "Year", and "Total". Three rows are listed: BE (2023, R10,000.00), HR (2023, R20,000.00), and FIN (2023, R20,000.00). To the right of the table are several buttons: "Budget Lines", "Export to Excel", "Edit" (which is highlighted with a red box), and "Delete". Below the table are pagination controls: "Items per page: 10" and "1 - 3 of 3".

Figure 1 Click Edit Budget Allocation Button.

This will navigate you to the “Edit Budget Allocation” screen where you will be able to Edit the Budget Allocation. Click on the “Save” button to edit the Budget Allocation. (All Details are prefilled)

The screenshot shows the "Edit Budget Allocation" form. It includes fields for "Total (R)" (4000), "Year" (2024), and "Department" (Finance). At the bottom are "Save" and "Cancel" buttons, with "Save" being highlighted with a red box.

Figure 1 Click Save Edit Budget Allocation Button.

2. **Total**: Change the total of the Budget Allocation. (Not Compulsory)
3. **Year**: Change the year of the Budget Allocation using a year date picker. (Not Compulsory)



4. **“Department”:** Change the department from the list of departments for the Budget Allocation.  
(Not Compulsory)

## Step 7 Delete Budget Allocation:

Delete a Budget Allocation by clicking on the “Delete” button on the Budget Allocation screen within the Budget Allocation table: (The row you chose is the Budget Allocation you will be deleting)

Department	Date Created	Year	Total	Budget Lines	Export to Excel	Edit	Delete
BE	26/08/2023	2023	R10,000.00	[button]	[button]	[button]	[button] (highlighted)
HR	26/08/2023	2023	R20,000.00	[button]	[button]	[button]	[button]
FIN	26/08/2023	2023	R20,000.00	[button]	[button]	[button]	[button]

Figure 1 Click Delete Budget Allocation Button

This will navigate you to the “Delete Budget Allocation” screen where you will be able to delete the Budget Allocation. Click on the “Yes” button to delete the Budget Allocation.



You are about to delete the Budget Allocation with total: 4000 for year 2024

Are you sure you want to continue?



Figure 1 Click Yes Delete Budget Allocation Button



## Budget Lines:

Filter, Create Budget Lines, Edit Budget Lines, and Delete Budget Lines:

### Step 1 Navigate to Budget Lines screen:

Navigate to the Budget Lines Screen by clicking on the “Finance” button on the top navbar or on the “Finance” button on the home screen:

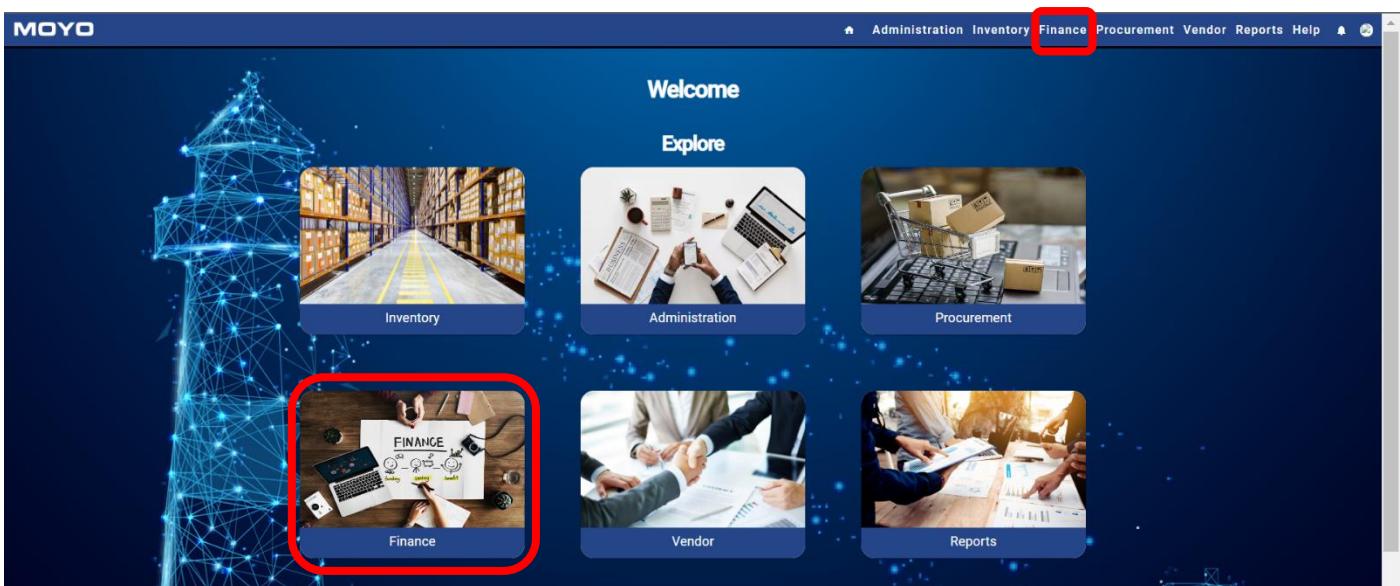


Figure 1 Home Screen to Budget Lines Screen

Then Click on the “Budget Allocation” button on the Finance side navbar and then click on the “Budget Lines” button in the Budget Allocation table:

Finance		Manage Budget Allocations ?				
		Search by Year				
Budget Categories	Budget Allocations	Department	Date Created	Year	Total	
		BE	26/08/2023	2023	R10,000.00	<button>Budget Lines</button> <button>Export to Excel</button> <button>Edit</button> <button>Delete</button>
		HR	26/08/2023	2023	R20,000.00	<button>Budget Lines</button> <button>Export to Excel</button> <button>Edit</button> <button>Delete</button>
		FIN	26/08/2023	2023	R20,000.00	<button>Budget Lines</button> <button>Export to Excel</button> <button>Edit</button> <button>Delete</button>

Figure 1 Finance side nav to Budget Lines Screen

## Step 2 Sort:

Sort the Budget Line table by clicking on the “Sort By” dropdown and choose the filter you want. (The filter will automatically be set to None)

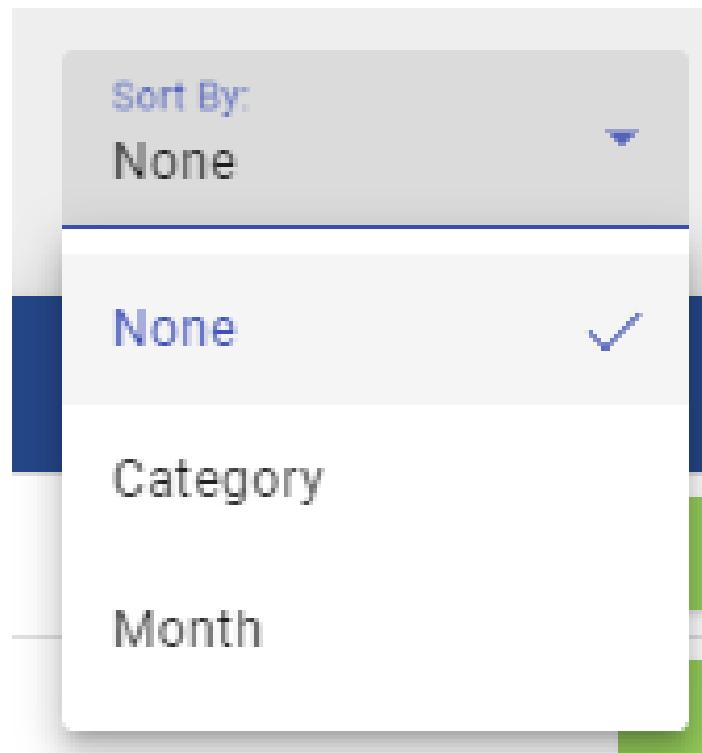


Figure 1 Filter Budget Line Button

- [“None”](#): Sort none of the budget lines in budget line table.
- [“Category”](#): Sort by the Category in budget line table.
- [“Month”](#): Sort by the Month in budget line table.



## Step 3 Create Budget Lines:

Create a new Budget Lines by clicking on the “Create Lines” button on the Budget Lines screen:

Category	Month	Budgeted	Actual	Variance	Edit	Delete
Entertainment	February	R10,000.00	R7,500.00	R2,500.00		
Technology	February	R2,000.00	R2,000.00	R0.00		
Marketing	February	R300.00	R300.00	R0.00		

Figure 1 Click Create Budget Lines Button

This will navigate you to the “Create Budget Lines” screen where you will be able to create the new Budget Lines. Click on the “Save” button to create the new Budget Lines.

Category: Choose one\*

Month: Select One

Budgeted (R): 0

Actual (R): 0

**Save**      **Cancel**

Figure 1 Click Save Create Budget Lines Button

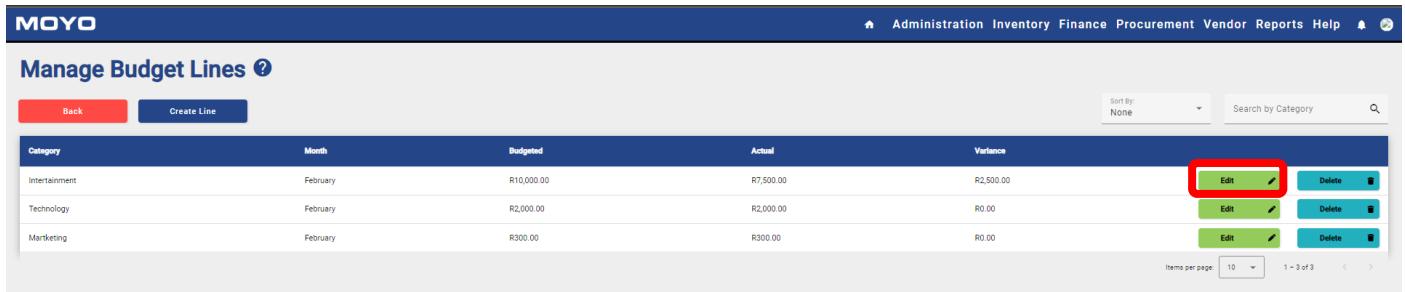
- “Category”**: Choose the category from the list of budget categories for the Budget Lines. (Compulsory)
- “Month”**: Choose the month from the list of January-December for the Budget Lines. (Compulsory)



3. **Budgeted (R)**: Fill in the budgeted amount for the Budget Lines. (Compulsory)
4. **Actual (R)**: Fill in the actual amount for the Budget Lines. (Compulsory)

## Step 4 Edit Budget Lines:

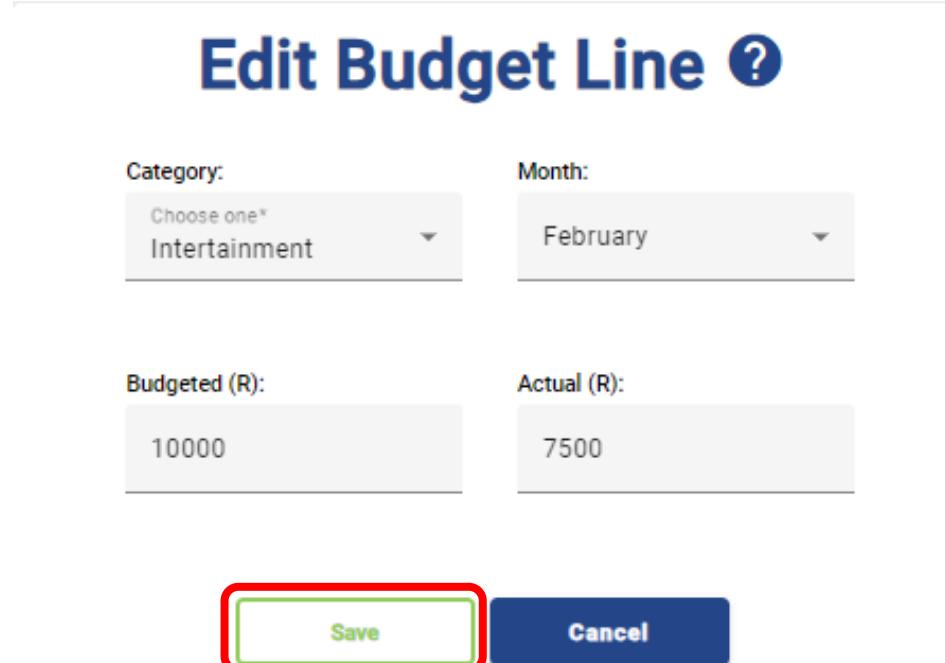
Edit a Budget Lines by clicking on the “Edit” button on the Budget Lines screen within the Budget Lines table: (The row you chose is the Budget Lines you will be editing)



Category	Month	Budgeted	Actual	Variance	Action
Entertainment	February	R10,000.00	R7,500.00	R2,500.00	<span>Edit</span> <span>Delete</span>
Technology	February	R2,000.00	R2,000.00	R0.00	<span>Edit</span> <span>Delete</span>
Marketing	February	R300.00	R300.00	R0.00	<span>Edit</span> <span>Delete</span>

Figure 1 Click Edit Budget Lines Button.

This will navigate you to the “Edit Budget Lines” screen where you will be able to Edit the Budget Lines. Click on the “Save” button to edit the Budget Lines. (All Details are prefilled)



**Edit Budget Line ?**

<b>Category:</b> Choose one* Entertainment	<b>Month:</b> February
<b>Budgeted (R):</b> 10000	<b>Actual (R):</b> 7500
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

Figure 1 Click Save Edit Budget Lines Button.

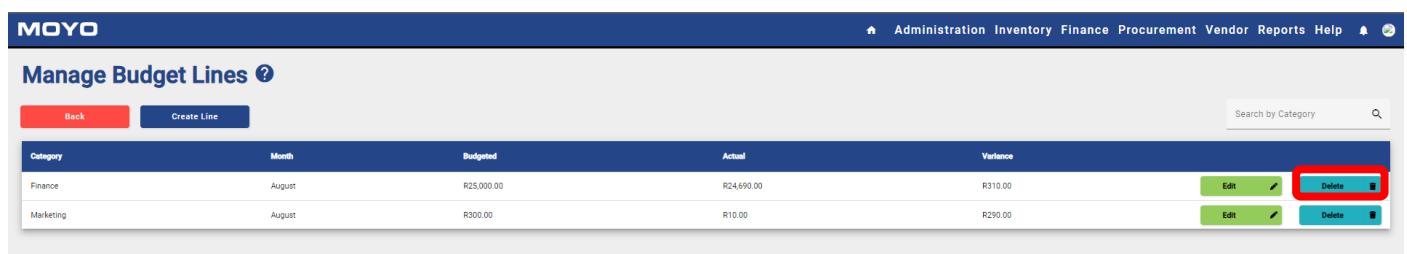


1. **“Category”:** Change the category from the list of budget categories for the Budget Lines. (Not Compulsory)
2. **“Month”:** Change the month from the list of January-December for the Budget Lines. (Not Compulsory)
3. **“Budgeted (R)”:** Change the budgeted amount for the Budget Lines. (Not Compulsory)
4. **“Actual (R)”:** Change the actual amount for the Budget Lines. (Not Compulsory)

## Step 5 Delete Budget Lines:

Delete a Budget Lines by clicking on the “Delete” button on the Budget Lines screen

within the Budget Lines table: (The row you chose is the Budget Lines you will be deleting)



Category	Month	Budgeted	Actual	Variance	Edit	Delete
Finance	August	R25,000.00	R24,690.00	R310.00		
Marketing	August	R300.00	R10.00	R290.00		

Figure 1 Click Delete Budget Allocation Lines

This will navigate you to the “Delete Budget Lines” screen where you will be able to delete the Budget Lines. Click on the “Yes” button to delete the Budget Lines.

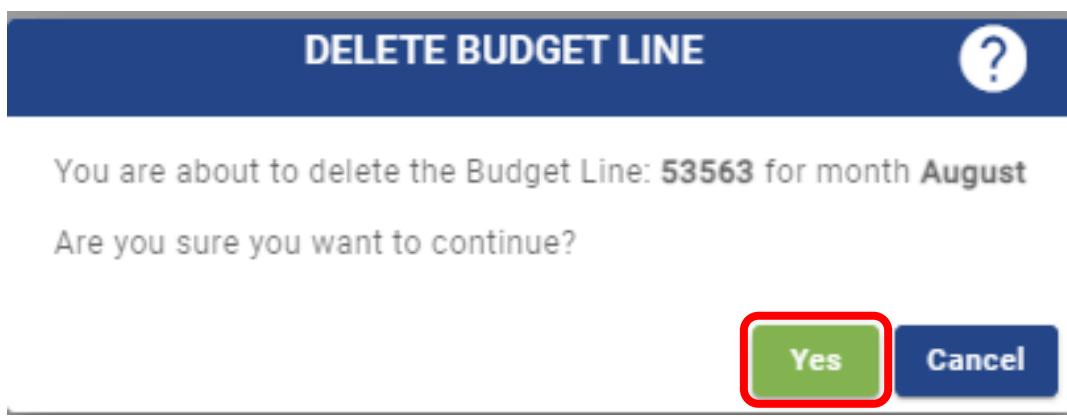


Figure 1 Click Yes Delete Budget Lines Button



## Finalise Procurement Request:

Create Finalised Procurement Request:

### Step 1 Navigate to Finalised Procurement Request screen:

Navigate to the Finalised Procurement Request Screen by clicking on the “Finance” button on the top navbar or on the “Finance” button on the home screen:

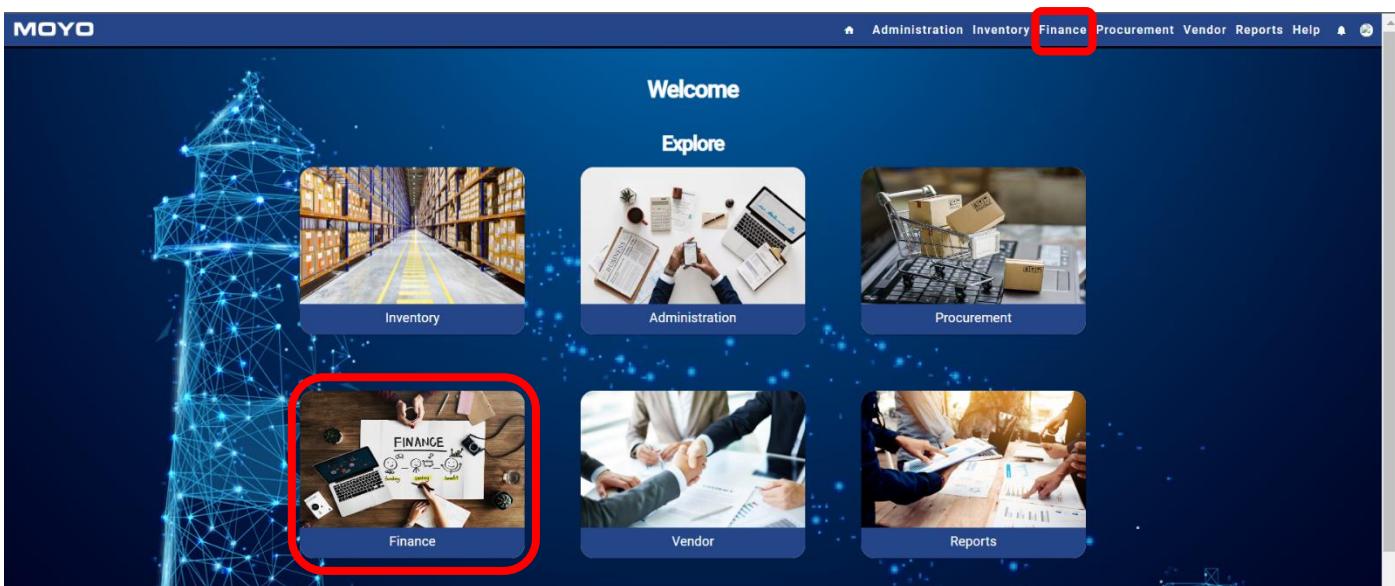


Figure 1 Home Screen to Budget Lines Screen

Then Click on the “Finalised Procurement Request” button on the Finance side navbar:

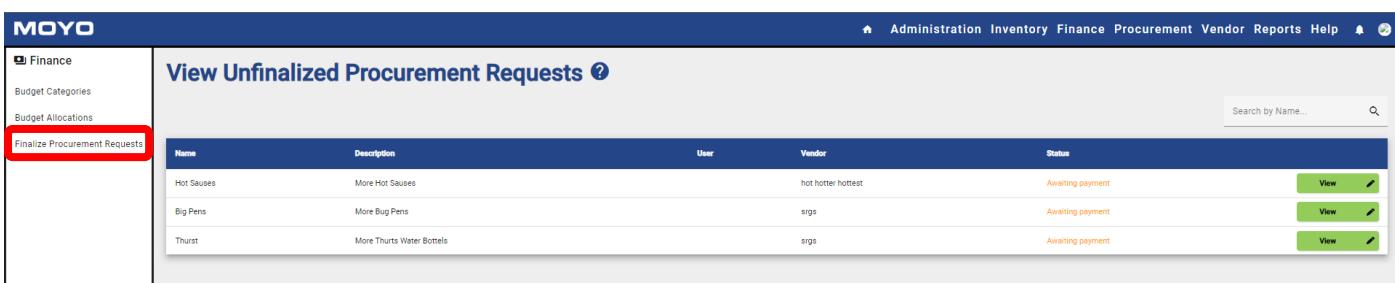


Figure 1 Finance side nav to Finalised Procurement Request Screen

## Step 2 Create Finalised Procurement Request:

Create a Finalised Procurement Request by clicking on the “View” button on the Finalised Procurement Request screen:

Name	Description	User	Vendor	Status	Action
Hot Sauces	More Hot Sauces		hot hotter hottest	Awaiting payment	<a href="#">View</a>
Big Pens	More Big Pens		srgs	Awaiting payment	<a href="#">View</a>
Thurst	More Thurst Water Bottles		srgs	Awaiting payment	<a href="#">View</a>

Figure 1 Click Create Finalised Procurement Request Button

This will navigate you to the “Create Finalised Procurement Request” screen where you will be able to create the Finalised Procurement Request. Click on the “Create” button to create the Finalised Procurement Request.

Total:  
R21,000.00

Budget Line Total:  
R30,300.00

Proof of payment?

[Create](#) [Cancel](#)

Figure 1 Click Create Finalised Procurement Request Button

1. **Total**: Prefilled and cannot be edited.
2. **Budget Line Total**: Prefilled and cannot be edited.



3. **“Proof of Payment”:** Check the proof of payment checkbox. Checkbox must be checked to be able to upload the proof of payment and finalise the procurement request.

The screenshot shows a 'Finalize Procurement Request' interface. At the top, it displays 'Total: R500,000.00' and 'Budget Line Total: R75,900.00'. Below these, there is a section for 'Proof of payment?' which has a checked checkbox. Underneath this, there is a file upload field with the placeholder 'Choose File' and the message 'No file chosen'. At the bottom of the form are two buttons: a green 'Create' button and a blue 'Cancel' button.

Figure 1 Create Finalised Procurement Request with checkbox Screen.

4. **“Choose File”:** Provide the Proof of Payment document. (Compulsory)(Proof of Payment document is required to be able to finalise the procurement request)

#### Explanation of the Finalised Procurement Request statuses:

Name	Description	User	Vendor	Status	
Hot Sauces	More Hot Sauces	hot hotter hottest		Awaiting payment	<button>View</button>
Big Pens	More Big Pens	srgs		Awaiting payment	<button>View</button>
Thurst	More Thurst Water Bottles	srgs		Awaiting payment	<button>View</button>

Figure 1 Finalise Procurement Request Status

- **Awaiting Payment:** If the status is “Awaiting payment” then the procurement request requires the proof of payment to be able to be finalised and become status “Done”.
- **Done:** If the status is “Done” then the procurement request is finalised.



# Procurement Section

## Procurement Request:

Create Procurement Request, Edit Procurement Request, and Delete 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:

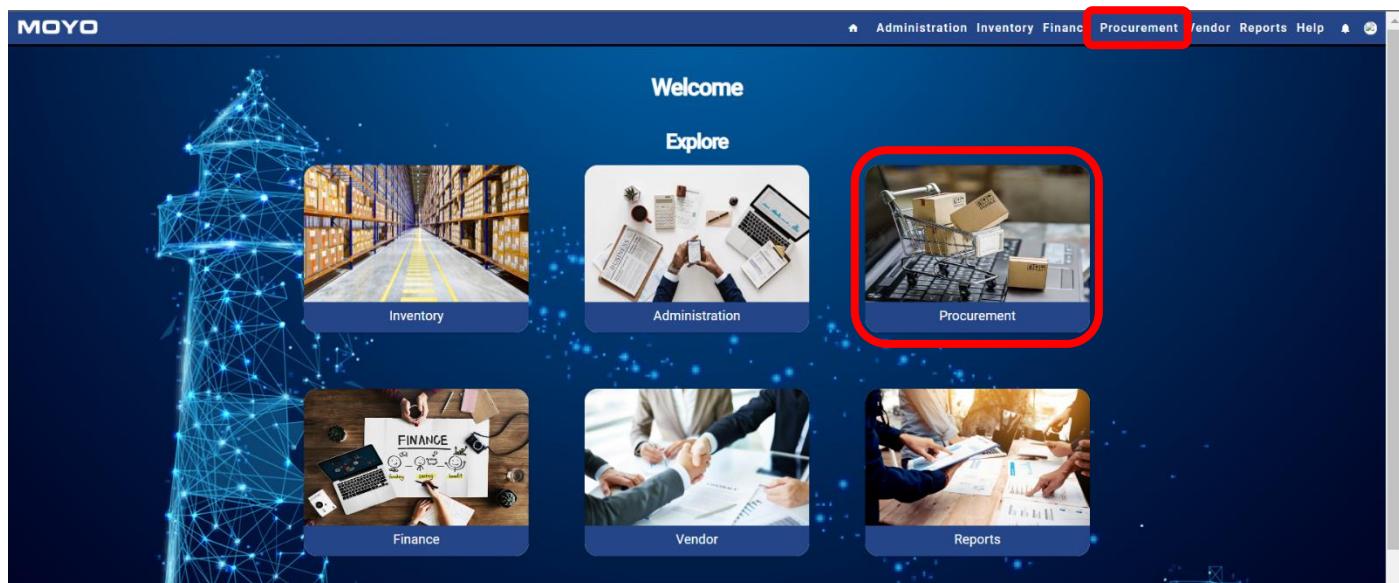


Figure 1 Home Screen to Procurement Request Screen

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)

Procurement Requests	
<a href="#">View Procurement Requests</a>	
View Pending Procurement Request	
Place Procurement Details	
View Flagged Procurement Details	
View Procurement Details	
View Procurement Request ?	
<a href="#">Create Request</a>	
<input type="text" value="Search by Name..."/>	
Name	
wethgegt	erwgeg
Procurement Example	Example Request
Thurst	More Thurts Water Bottels
Big Pens	More Big Pens
cold sauses	Cold Sauses
Request Example	Example description
Chairs	Office Chairs
<small>Items per page: 10   1 ~ 7 of 7</small>	

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:

Name	Description	User	Vendor	Status	Edit	Delete
wethert	erwgeg	Admin	srgs	Approval Required		
Procurement Example	Example Request	Admin	hot hotter hottest	Approval Required		
Thurst	More Thurst Water Bottels	Admin	srgs	Accepted (Ready to order)		
Big Pens	More Big Pens	Admin	srgs	Accepted (Ready to order)		
cold sauses	Cold Sauses	Admin	hot hotter hottest	Approval Required		
Request Example	Example description	Admin	hot hotter hottest	Rejected		
Chairs	Office Chairs	Admin	srgs	Approval Required		

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.

Approved Vendor  Other

Request Name:

Vendor:

Request Description:

The Procurement Quote:  No file chosen

**Save** **Cancel**

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.

## Create Procurement Request

The screenshot shows a web-based form titled "Create Procurement Request". At the top, there are two radio buttons: "Approved Vendor" (unchecked) and "Other" (checked, highlighted with a red box). Below the radio buttons are four input fields: "Request Name", "Vendor Name", "Vendor Email", and "Preferred Quote". Each field has a placeholder and a character limit note ("Not more than 50 characters long." or "Not more than 32 characters long."). Under "Preferred Quote", there is a file upload button labeled "Choose File" with the message "No file chosen". Below these are two more file upload fields for "Comparative Quote 1" and "Comparative Quote 2", both with "Choose File" buttons and "No file chosen" messages. At the bottom, there is a large "Request Description" text area with a character limit note ("Not more than 50 characters long."). At the very bottom are two buttons: "Save" (highlighted with a red box) and "Cancel".

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)



## Step 3 Edit Procurement Request:

Edit a Procurement Request by clicking on the “Edit” button on the Procurement Request screen within the Procurement Request table: (The row you chose is the Procurement Request you will be editing)

Name	Description	User	Vendor	Status
wethgert	erwreg	Admin	srgs	Approval Required
Procurement Example	Example Request	Admin	hot hotter hottest	Approval Required
Thurst	More Thurst Water Bottles	Admin	srgs	Accepted (Ready to order)
Big Pens	More Big Pens	Admin	srgs	Accepted (Ready to order)
cold sauses	Cold Sauses	Admin	hot hotter hottest	Approval Required
Request Example	Example description	Admin	hot hotter hottest	Rejected
Chairs	Office Chairs	Admin	srgs	Approval Required

Figure 1 Click Edit Procurement Request Button.

If the Procurement Request was of type Approve Vendor, this will navigate you to the “Edit Procurement Request” screen where you will be able to Edit the Procurement Request. Click on the “Save” button to edit the Procurement Request.

Vendor Type: Completed

Request Name: Hot Sauses

Vendor: hot hotter hottest

Request Description: Hot sauses for moyo

Replace Quote: Choose File | No file chosen

Your Quotes      Quote

Quote 1      Budget Variance Report (3).pdf

**Save**      Cancel

Figure 1 Click Save Edit Procurement Request Button Approved Vendor

1. “Request Name”: Change the name of the procurement request. (Not Compulsory)



2. **“Vendor”**: Change the vendor for the list of approved/added vendors. (Not Compulsory)
3. **“Request Description”**: Change the description of the procurement request. (Not Compulsory)
4. **“The Procurement Quote”**: Change the procurement quote for the procurement request. (not Compulsory)

If the Procurement Request was of type Other, this will navigate you to the “Edit Procurement Request” screen where you will be able to Edit the Procurement Request. Click on the “Save” button to edit the Procurement Request.

Vendor Type: Completed

Request Name:

Office Upgrades

Not more than 50 characters long.

Request Description:

Chairs pens and keyboards for the office

Not more than 50 characters long.

Replace Quote:

Choose File | No file chosen

Provide Quote to replace.

Your Quotes	Quote
Quote 1	Business Unit Allocation Report (1).pdf
Quote 2	Vendor Spent Report (5).pdf
Quote 3	Budget Variance Report (4).pdf

Save      Cancel

Figure 1 Click Update Edit Onboard Request Button Sole Supplier

1. **“Request Name”**: Change the name of the procurement request. (Not Compulsory)
2. **“Vendor Name”**: Change the name of the vendor for the procurement request. (Not Compulsory)
3. **“Request Description”**: Change the description of the procurement request. (Not Compulsory)
4. **“Replace Quote”**: Change the preferred procurement quote for the procurement request. (Not Compulsory)



## Step 4 Delete Procurement Request:

Delete a Procurement Request by clicking on the “Delete” button on the Procurement Request screen within the Procurement Request table: (The row you chose is the Procurement Request you will be deleting)

Name	Description	User	Vendor	Status	Action
wethqert	erwgeg	Admin	srgs	Approval Required	<button>Edit</button> <button>Delete</button>
Procurement Example	Example Request	Admin	hot hotter hottest	Approval Required	<button>Edit</button> <button>Delete</button>
Thurst	More Thurst Water Bottels	Admin	srgs	Accepted (Ready to order)	<button>Edit</button> <button>Delete</button>
Big Pens	More Big Pens	Admin	srgs	Accepted (Ready to order)	<button>Edit</button> <button>Delete</button>
cold sauses	Cold Sauses	Admin	hot hotter hottest	Approval Required	<button>Edit</button> <button>Delete</button>
Request Example	Example description	Admin	hot hotter hottest	Rejected	<button>Edit</button> <button>Delete</button>
Chairs	Office Chairs	Admin	srgs	Approval Required	<button>Edit</button> <button>Delete</button>

Figure 1 Click Delete Procurement Request Button

This will navigate you to the “Delete Procurement Request” screen where you will be able to delete the Procurement Request. Click on the “Yes” button to delete the Procurement Request.



You are about to delete the request for: Procurement Example  
Are you sure you want to continue?



Figure 1 Click Yes Delete Procurement Request Button



## Explanation of the Procurement Request statuses:

The screenshot shows a software application window titled "View Procurement Request". The left sidebar has a "MOYO" logo and links for "Procurement Requests", "View Pending Procurement Request", "Place Procurement Details", "View Flagged Procurement Details", and "View Procurement Details". The main area has a title "View Procurement Request" with a question mark icon. Below it is a "Create Request" button. A search bar says "Search by Name...". A table lists 7 procurement requests with columns: Name, Description, User, Vendor, and Status. The rows are:

Name	Description	User	Vendor	Status	Edit	Delete
wethgert	erwgeg	Admin	srgs	Approval Required		
Procurement Example	Example Request	Admin	hot hotter hottest	Approval Required		
Thurst	More Thurts Water Bottels	Admin	srgs	Accepted (Ready to order)		
Big Pens	More Big Pens	Admin	srgs	Accepted (Ready to order)		
cold causes	Cold Causes	Admin	hot hotter hottest	Approval Required		
Request Example	Example description	Admin	hot hotter hottest	Rejected		
Chairs	Office Chairs	Admin	srgs	Approval Required		

At the bottom right, there are buttons for "Items per page: 10" and "1 - 7 of 7".

Figure 1 Procurement Request Status

- **Approved (Ready to order):** 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.
- **Rejected:** 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.
- **Approval Required:** If the status is Approval Required that means that the Procurement request is still waiting approval.



## Pending Procurement Request:

Approve Procurement Request, and Reject Procurement Request:

### Step 1 Navigate to Pending Procurement Request screen:

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

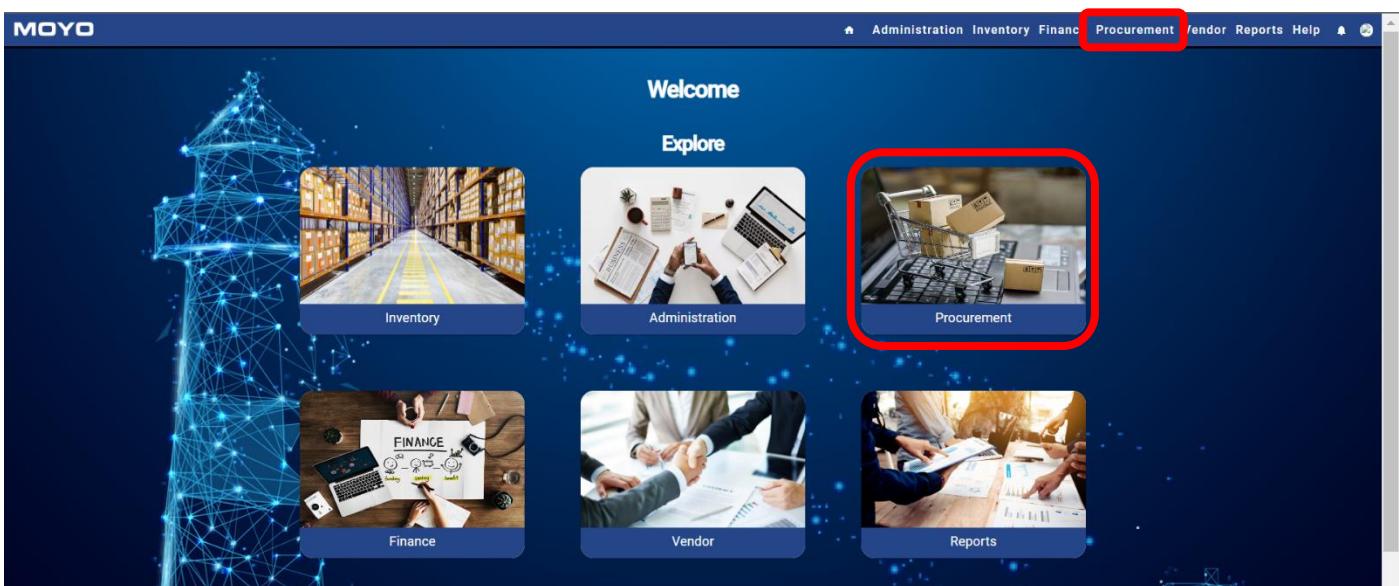


Figure 1 Home Screen to Pending Procurement Request Screen

Then Click on the “View Pending Procurement Request” button on the Procurement side navbar(\*Note Only the Budget Owner of a specific Department will be able to view Pending Procurement Requests of their allocated Department, thus also being the only ones able to approve or reject a procurement request.)



Figure 1 Procurement side nav to Pending Procurement Request Screen



## Step 2 Approve Pending Procurement Request:

Approve the Pending Procurement Request by clicking on the “View” button on the Pending Procurement Request screen:

Name	Description	User	Vendor
Hot Suses	I want More Hot Sauses	NewAdmin765	hot hotter hottest
Skoene	velles	NewAdmin765	VeldSkoene

Figure 1 Click View Pending Procurement Request Button

This will navigate you to the Approve/Reject Pending procurement Request screen where you will be able to Approve the Pending Procurement Request. Click the “Approve” button to approve the procurement request. (\*Note If the Pending Procurement Request that you are viewing is an Approved Vendor Procurement Request)

Company Name: hot hotter hottest

Company Email: HotSause@gmail.com

Description: I want More Hot Sauses

Procurement Quote: [Business Unit Allocation Report \(1\).pdf](#)

Approve      Reject

Figure 1 Click Approve Procurement Request Button Approved Vendor

(\*Note If the Pending Procurement Request that you are viewing is an Other Vendor Procurement Request)



Company Name: VeldSkoene

Company Email: VeldSkoene@gmail.com

Description: vellies

Preferred Quote: Budget Variance Report (4).pdf

Comparative Quote 1: Vendor Spent Report (2).pdf

Comparative Quote 2: BEESpentReport (2).pdf

**Approve**      **Reject**

Figure 1 Click Approve Procurement Request Button Other Vendor

### Step 3 Reject Pending Procurement Request:

Reject the Pending Procurement Request by clicking on the “View” button on the Pending Procurement Request screen:

Name	Description	User	Vendor	
Hot Sauces	I want More Hot Sauces	NewAdmin765	hot hotter hottest	<b>View</b>
Skoene	vellies	NewAdmin765	VeldSkoene	<b>View</b>

Figure 1 Click View Pending Procurement Request Button

This will navigate you to the Approve/Reject Pending Procurement Request screen where you will be able to Reject the Pending Procurement Request. Click the “Reject” button to reject the procurement request. (\*Note If the Pending Procurement Request that you are viewing is an Approve Vendor Procurement Request)



The screenshot shows a mobile-style application interface for approving or rejecting a procurement request. At the top, it says "Procurement Request For hot hotter hottest ?". Below that is a blue header bar with the text "Please Approve or Reject the Procurement Request". The form fields are as follows:

- Company Name: hot hotter hottest
- Company Email: HotSause@gmail.com
- Description: I want More Hot Sauces
- Procurement Quote: [Business Unit Allocation Report \(1\).pdf](#)

At the bottom, there are two buttons: "Approve" (green) and "Reject" (red, highlighted with a red box).

Figure 1 Click Reject Procurement Request Button Approved Vendor

(\*Note If the Pending Procurement Request that you are viewing is an Other Vendor Procurement Request)

The screenshot shows a mobile-style application interface for approving or rejecting a procurement request. At the top, it says "Procurement Request For VeldSkoene ?". Below that is a blue header bar with the text "Please Approve or Reject the Procurement Request". The form fields are as follows:

- Company Name: VeldSkoene
- Company Email: VeldSkoene@gmail.com
- Description: vellies
- Preferred Quote: [Budget Variance Report \(4\).pdf](#)
- Comparative Quote 1: [Vendor Spent Report \(2\).pdf](#)
- Comparative Quote 2: [BEESpentReport \(2\).pdf](#)

At the bottom, there are two buttons: "Approve" (green) and "Reject" (red, highlighted with a red box).

Figure 1 Click Reject Procurement Request Button Other Vendor



## Place Procurement Details:

Place Procurement Details:

Step 1 Navigate to Place Procurement Details screen:

Navigate to the Place Procurement Details Screen by clicking on the “Procurement” button on the top navbar or on the “Procurement” button on the home screen:

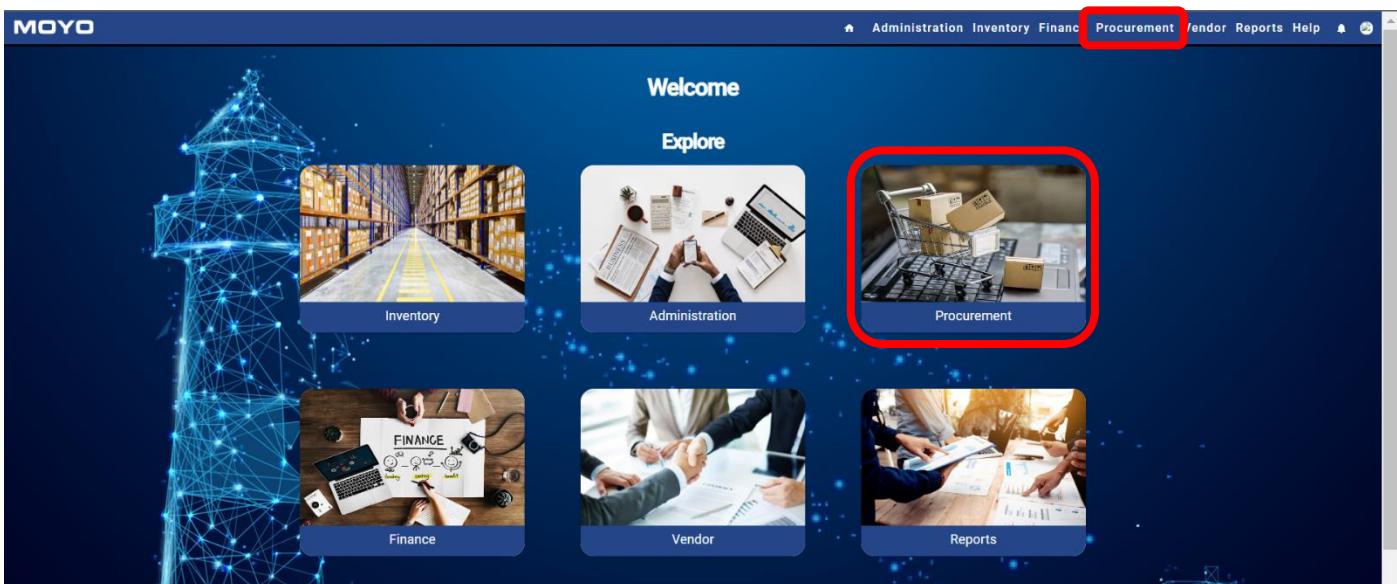


Figure 1 Home Screen to Place Procurement Details Screen

Then Click on the “Place Procurement Details” button on the Procurement side navbar:  
(\*Note you will only be able to see your own procurement details)

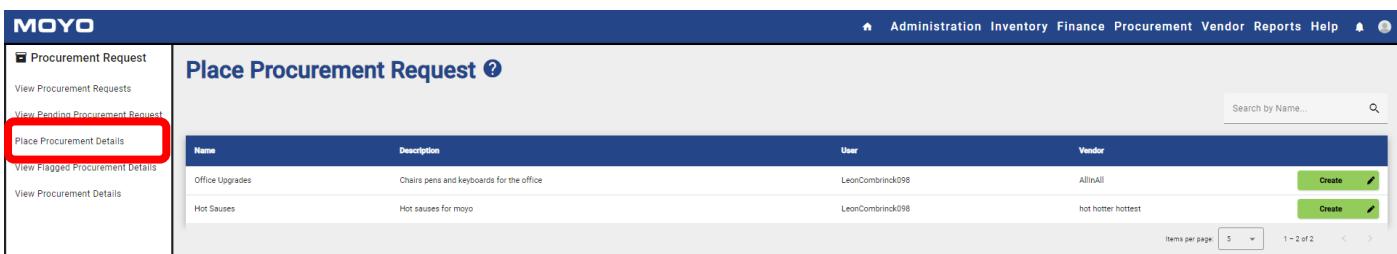
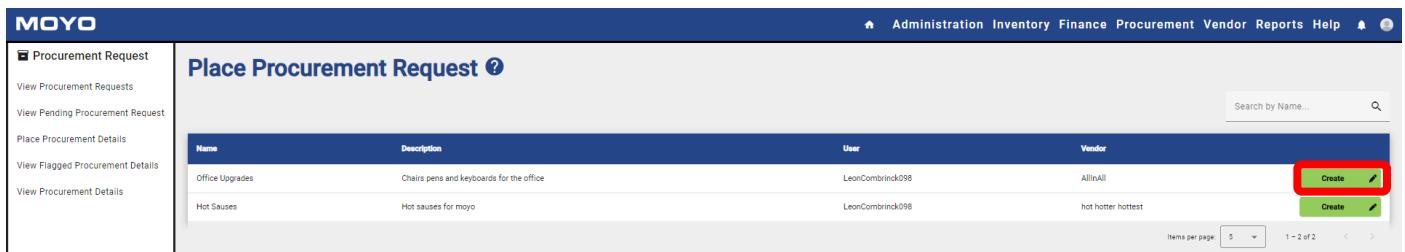


Figure 1 Procurement side nav to Place Procurement Details Screen

## Step 2 Place Procurement Details:

Place a new Procurement Details request by clicking on the “Create” button on the Place Procurement Details screen:



The screenshot shows the MOYO software interface. On the left, there is a sidebar with the MOYO logo and several menu items: 'Procurement Request' (selected), 'View Procurement Requests', 'View Pending Procurement Request', 'Place Procurement Details' (selected), 'View Flagged Procurement Details', and 'View Procurement Details'. The main area is titled 'Place Procurement Request' with a help icon. It contains a table with two rows of data. The columns are 'Name', 'Description', 'User', and 'Vendor'. The first row has 'Office Upgrades' in 'Name', 'Chairs pens and keyboards for the office' in 'Description', 'LeonCombrinck098' in 'User', and 'AllinAll' in 'Vendor'. The second row has 'Hot Sauces' in 'Name', 'Hot sauces for moyo' in 'Description', 'LeonCombrinck098' in 'User', and 'hot hotter hottest' in 'Vendor'. At the bottom right of the table, there are two green buttons labeled 'Create' with edit icons. A red box highlights the top 'Create' button. Above the table is a search bar with the placeholder 'Search by Name...' and a magnifying glass icon. Below the table are buttons for 'Items per page' (set to 5), '1 - 2 of 2', and navigation arrows.

Figure 1 Click Create Place Procurement Details Button

This will navigate you to the “Place Procurement Request Details” screen where you will be able to place a new Procurement Request detail. Click on the “Place” button to place the procurement request details. If you want to place a Consumable procurement request detail. (\*Note checking the checkboxes will request more information)



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MOYO

## Place Procurement Requests Details

Please fill in the following details:

Buyer Name:	Leon
Buyer Email:	leon.rigel324@gmail.com
Item Type:	Consumable
Select Consumable Item:	Please Select a Consumable
Quantity:	<input type="text"/>
Account Code:	Please Select an Account Code
Payment Type:	Please select a payment method
Has Deposit?	<input checked="" type="checkbox"/>
Deposit Amount:	<input type="text"/>
Deposit Due Date:	Choose a date*
Full Payment Made?	<input checked="" type="checkbox"/>
Paid On Date:	Choose a date*
Upload Receipt:	<input type="button" value="Choose File"/> No file chosen
Proof of payment?	<input checked="" type="checkbox"/>
Upload Proof of payment document:	<input type="button" value="Choose File"/> No file chosen
Total Amount:	<input type="text"/>
Total Amount Due Date:	Choose a date*
Comments:	<input type="text" value="Comments for Procurement Details"/>
<input type="button" value="Place"/> <input type="button" value="Cancel"/>	

Figure 1 Click Place Procurement Request Button Consumable

1. “Buyer Name”: Prefilled with your name and cannot be changed.



2. **“Buyer Email”:** Prefilled with your email and cannot be changed.
3. **“Item Type”:** Choose from the dropdown list Consumable. (Compulsory for placing consumable procurement request)
  - **“Select Consumable Item”:** Choose from the dropdown list of consumables on the system. (Compulsory)
  - **“Quantity”:** Fill in the quantity of the consumable you want to buy. (Compulsory)
4. **“Account Code”:** Choose from the dropdown list the account code on the system. (Compulsory)
5. **“Payment Type”:** Choose from the dropdown list the payment type that you will pay with. (Compulsory)
6. **“Has Deposit?”:** Check the checkbox if you already deposited an amount. (Not Compulsory)
  - **“Deposited Amount”:** Fill in the amount that you deposited. (Compulsory)
  - **“Deposit Due Date”:** Choose the date of deposit using a date picker. (Compulsory)
7. **“Full Payment Made?”:** Check the checkbox if you already made the full payment. (Not Compulsory)
  - **“Paid On Date”:** Choose the date of full payment using a date picker. (Compulsory)
  - **“Upload Receipt”:** Provide the receipt of the full payment. (Compulsory)
8. **“Proof of payment?”:** Check the checkbox if you have the proof of payment. (Not Compulsory)
  - **“Upload Proof of payment document”:** Provide the proof of payment document. (Compulsory)
9. **“Total Amount”:** Fill in the total amount of the procurement. (Compulsory. Amounts over 80 000 or amount over your mandate limit will automatically be flagged)
10. **“Total Amount Due Date”:** Choose the date the total amount should be paid using a date picker. (Compulsory)
11. **“Comments”:** Fill in a comment about the procurement request details. (Compulsory)

**Click on the “Place” button to place the procurement request details. If you want to place a Asset procurement request detail. (\*Note checking the checkboxes will request more information)**



## Place Procurement Requests Details ⓘ

Please fill in the following details:

Buyer Name: Leon

Buyer Email: leon.rigel@24@gmail.com

Item Type: Assets

Asset Name:

Description of Asset: Description of assets

Account Code: Please Select an Account Code

Payment Type: Please select a payment method

Has Deposit?

Deposit Amount:

Deposit Due Date: Choose a date\*

Full Payment Made?

Paid On Date: Choose a date\*

Upload Receipt: Choose File No file chosen

Proof of payment?

Upload Proof of payment document: Choose File No file chosen

Total Amount:

Total Amount Due Date: Choose a date\*

Comments: Comments for Procurement Details

**Place** **Cancel**

Figure 1 Click Place Procurement Request Button Asset



1. **“Buyer Name”:** Prefilled with your name and cannot be changed.
2. **“Buyer Email”:** Prefilled with your email and cannot be changed.
3. **“Item Type”:** Choose from the dropdown list Asset. (Compulsory for placing asset procurement request)
  - **“Asset Name”:** Fill in the name of the asset you want to buy. (Compulsory)
  - **“Description of Asset”:** Fill in the Description of the asset you want to buy. (Compulsory)
4. **“Account Code”:** Choose from the dropdown list the account code on the system. (Compulsory)
5. **“Payment Type”:** Choose from the dropdown list the payment type that you will pay with. (Compulsory)
6. **“Has Deposit?”:** Check the checkbox if you already deposited an amount. (Not Compulsory)
  - **“Deposited Amount”:** Fill in the amount that you deposited. (Compulsory)
  - **“Deposit Due Date”:** Choose the date of deposit using a date picker. (Compulsory)
7. **“Full Payment Made?”:** Check the checkbox if you already made the full payment. (Not Compulsory)
  - **“Paid On Date”:** Choose the date of full payment using a date picker. (Compulsory)
  - **“Upload Receipt”:** Provide the receipt of the full payment. (Compulsory)
8. **“Proof of payment?”:** Check the checkbox if you have the proof of payment. (Not Compulsory)
  - **“Upload Proof of payment document”:** Provide the proof of payment document. (Compulsory)
9. **“Total Amount”:** Fill in the total amount of the procurement. (Compulsory. Amounts over 80 000 or amount over your mandate limit will automatically be flagged)
10. **“Total Amount Due Date”:** Choose the date the total amount should be paid using a date picker. (Compulsory)
11. **“Comments”:** Fill in a comment about the procurement request datils. (Compulsory)



## View Flagged Procurement Details:

Accept Flagged Procurement Detail, and Reject Flagged Procurement Details:

Step 1 Navigate to Flagged Procurement Details screen:

Navigate to the Flagged Procurement Details Screen by clicking on the “Procurement” button on the top navbar or on the “Procurement” button on the home screen:

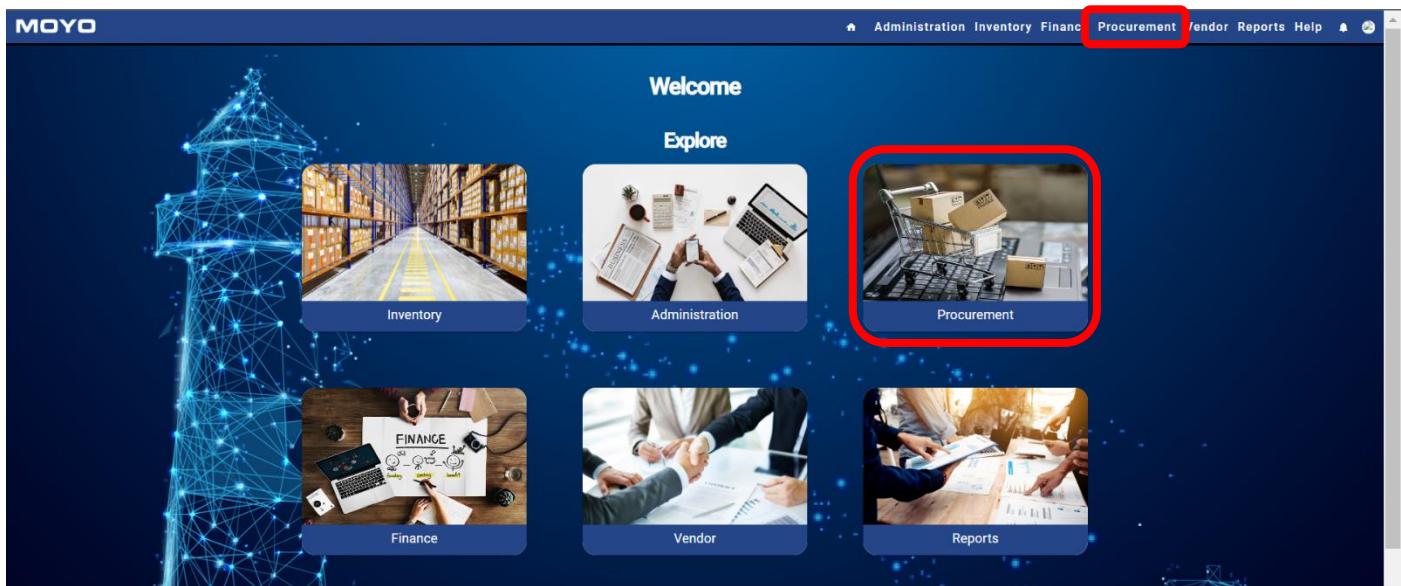


Figure 1 Home Screen to Flagged Procurement Details Screen

Then Click on the “View Flagged Procurement Details” button on the Procurement side navbar: (\*Note Placed Procurement Details will only be flagged if the amount is over the users mandate limit or 80 000-150 000[Can only be viewed by FD-Financial Director] or over 150 000[can only be viewed by MD-Managing Director])

The image shows the MOYO Business Advisory procurement side navigation. On the left, there is a sidebar with the following menu items: Procurement Request (with a sub-item View Procurement Requests), View Pending Procurement Request, Place Procurement Details, View Flagged Procurement Details (which is highlighted with a red box), and View Procurement Details. The main content area is titled "View Flagged Placed Procurement Request ?". It contains a table with the following data:

Vendor Name	Created By	Mandate Limit	Request Total	Payment Due Date	Action
TechMan	Leon	R10,000.00	R200,000.00	26/09/2023	<button>View</button> <button>Edit</button>
AllInAll	Leon	R10,000.00	R200,000.00	24/10/2023	<button>View</button> <button>Edit</button>

At the bottom of the table, there are buttons for "Items per page:" (set to 5), "1 - 2 of 2", and navigation arrows. There is also a search bar at the top right labeled "Search by Name..." with a magnifying glass icon.

Figure 1 Procurement side nav to Flagged Procurement Details Screen



## Step 2 Accept Flagged Procurement Details:

Accept a Flagged Procurement Details request by clicking on the “View” button on the Flagged Procurement Details screen:

Vendor Name	Created By	Mandate Limit	Request Total	Payment Due Date
TechMan	Leon	R10,000.00	R200,000.00	26/09/2023
AllinAll	Leon	R10,000.00	R200,000.00	24/10/2023

Figure 1 Click View Flagged Procurement Details Button Accept

This will navigate you to the Accept/Reject Flagged Procurement Details screen where you will be able to Accept the Flagged Procurement Details Request. Click on the “Accept” button to accept the flagged procurement request details. If the Flagged procurement details is of a Consumable.



**Procurement Details for AllInAll ?**

Please Accept Or Reject the following request:

Buyer Name:	Leon
Buyer Email:	leon.rigel324@gmail.com
Item Type:	Consumable
Select Consumable Item:	Pens
Quantity:	250
Account Code:	Technology
Payment Type:	Credit
Has Deposit?	<input type="checkbox"/>
Full Payment Made?	<input type="checkbox"/>
Proof of payment?	<input type="checkbox"/>
Total Amount:	R200,000.00
Total Amount Due Date:	09/26/2023
Comments:	E Pens

**Accept** **Reject**

Figure 1 Click Accept Flagged Procurement Request Button Consumable

**Click on the “Accept” button to accept the flagged procurement request details. If the Flagged procurement details is of a Asset.**



**Procurement Details for TechMan ?**

Please Accept Or Reject the following request:

Buyer Name:	Leon
Buyer Email:	leon.rigel324@gmail.com
Item Type:	Assets
Asset Name:	PC
Description of Asset:	new Computers
Account Code:	Technology
Payment Type:	Credit
Has Deposit?	<input type="checkbox"/>
Full Payment Made?	<input type="checkbox"/>
Proof of payment?	<input type="checkbox"/>
Total Amount:	R200,000.00
Total Amount Due Date:	09/26/2023
Comments:	new pc for office

**Accept** **Reject**

Figure 1 Click Accept Flagged Procurement Request Button Asset



## Step 3 Reject Flagged Procurement Details:

Reject a Flagged Procurement Details request by clicking on the “View” button on the Flagged Procurement Details screen:

Vendor Name	Created By	Mandate Limit	Request Total	Payment Due Date	
TechMan	Leon	R10,000.00	R200,000.00	26/09/2023	<button>View</button> <span style="color: red;">Edit</span>
AllinAll	Leon	R10,000.00	R200,000.00	24/10/2023	<button>View</button> <span style="color: green;">Edit</span>

Figure 1 Click View Flagged Procurement Details Button Reject

This will navigate you to the Accept/Reject Flagged Procurement Details screen where you will be able to Reject the Flagged Procurement Details Request. Click on the “Reject” button to reject the flagged procurement request details. If the Flagged procurement details is of a Consumable.



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**Procurement Details for AllInAll ?**

Please Accept Or Reject the following request:

Buyer Name:	Leon
Buyer Email:	leon.rigel324@gmail.com
Item Type:	Consumable
Select Consumable Item:	Pens
Quantity:	250
Account Code:	Technology
Payment Type:	Credit
Has Deposit?	<input type="checkbox"/>
Full Payment Made?	<input type="checkbox"/>
Proof of payment?	<input type="checkbox"/>
Total Amount:	R200,000.00
Total Amount Due Date:	09/26/2023
Comments:	E Pens

**Accept** **Reject**

Figure 1 Click Reject Flagged Procurement Request Button Consumable

**Click on the “Reject” button to reject the flagged procurement request details. If the Flagged procurement details is of a Asset.**



**Procurement Details for TechMan ?**

Please Accept Or Reject the following request:

Buyer Name:	Leon
Buyer Email:	leon.rigel324@gmail.com
Item Type:	Assets
Asset Name:	PC
Description of Asset:	new Computers
Account Code:	Technology
Payment Type:	Credit
Has Deposit?	<input type="checkbox"/>
Full Payment Made?	<input type="checkbox"/>
Proof of payment?	<input type="checkbox"/>
Total Amount:	R200,000.00
Total Amount Due Date:	09/26/2023
Comments:	new pc for office

**Accept** **Reject**

Figure 1 Click Reject Flagged Procurement Request Button Asset



## View Procurement Details:

Upload Proof of Payment, Upload Invoice, and Receive Item:

### Step 1 Navigate to View Procurement Details screen:

Navigate to the View Procurement Details Screen by clicking on the “Procurement” button on the top navbar or on the “Procurement” button on the home screen:

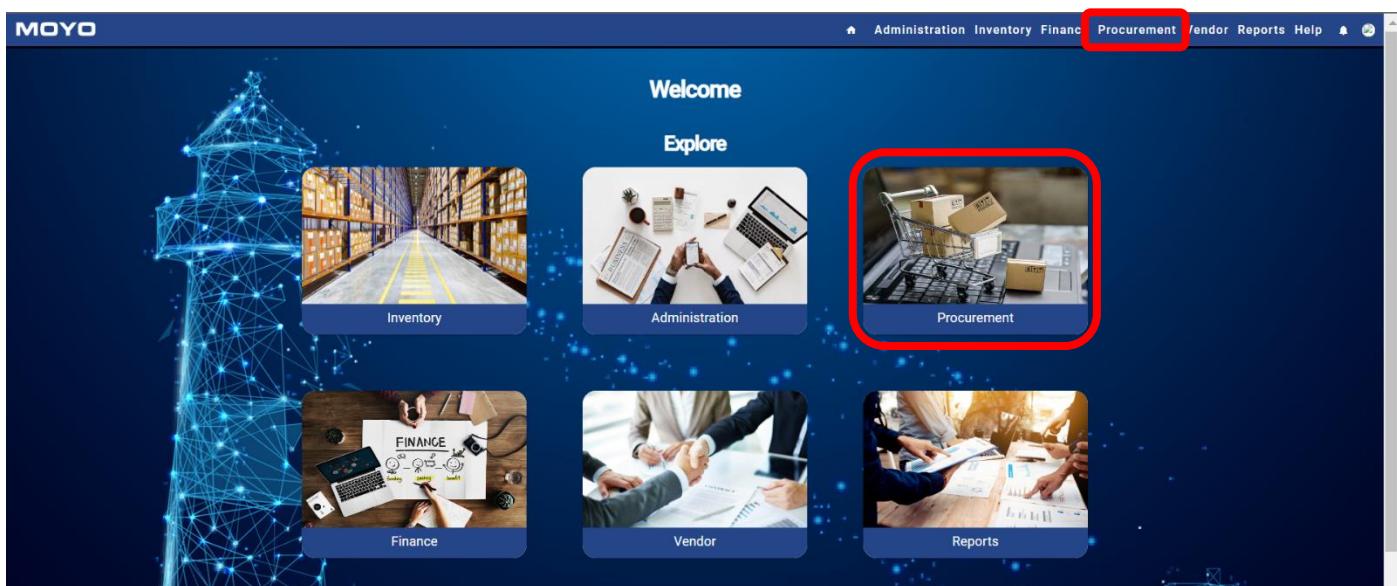


Figure 1 Home Screen to View Procurement Details Screen

Then Click on the “View Procurement Details” button on the Procurement side navbar:

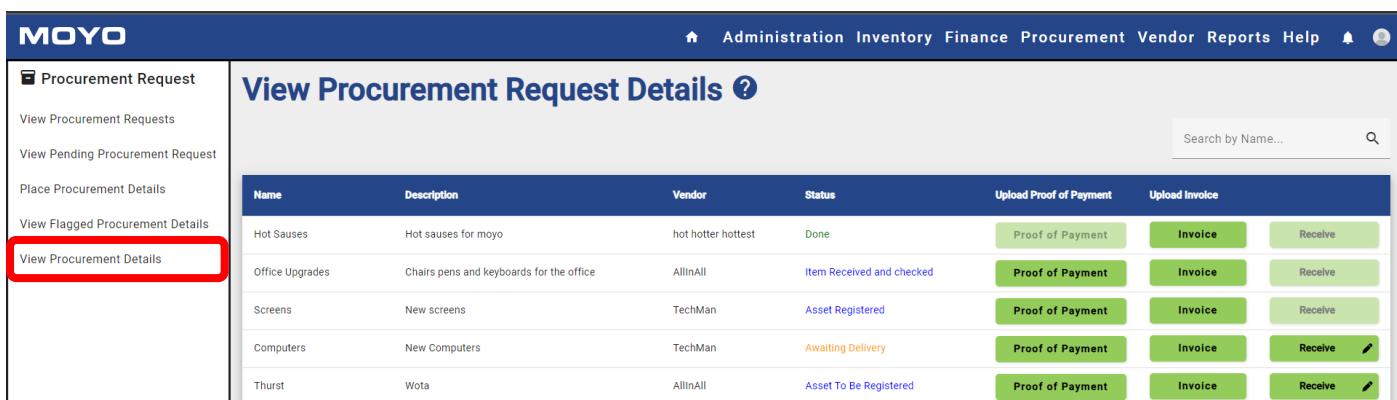


Figure 1 Procurement side nav to View Procurement Details Screen



## Step 2 Upload Proof of Payment:

Upload the proof of payment by clicking on the “Proof of Payment” button on the View Procurement Details screen:

Name	Description	Vendor	Status	Upload Proof of Payment	Upload Invoice	Receive
Hot Sauces	Hot sauces for moyo	hot hotter hottest	Done	<button>Proof of Payment</button>	<button>Invoice</button>	<button>Receive</button>
Office Upgrades	Chairs pens and keyboards for the office	AllinAll	Item Received and checked	<button>Proof of Payment</button>	<button>Invoice</button>	<button>Receive</button>
Screens	New screens	TechMan	Asset Registered	<button>Proof of Payment</button>	<button>Invoice</button>	<button>Receive</button>
Computers	New Computers	TechMan	Awaiting Delivery	<button>Proof of Payment</button>	<button>Invoice</button>	<button>Receive</button>
Thurst	Wota	AllinAll	Asset To Be Registered	<button>Proof of Payment</button>	<button>Invoice</button>	<button>Receive</button>

Figure 1 Click Proof of Payment View Procurement Details Button

This will navigate you to the “Upload Proof of Payment” screen by clicking on the “Upload Receipt” tab. There you will be able to upload the proof of payment. Click on the “Upload File” button to upload the proof of payment. (If you want to upload the Proof of Payment receipt and not the Credit Card Payment receipt)

Figure 1 Click Upload File Upload Receipt Proof of Payment

1. “Upload a Receipt file”: Provide the Receipt file for the procurement details. (Compulsory)

Or navigate you to the “Upload Credit Card Payment” screen by clicking on the “Upload Credit Card Payment” tab. There you will be able to upload the Credit Card Payment



receipt. Click on the “Upload File” button to upload the credit card payment. (If you want to upload the Credit Card Payment Receipt and not the Proof of Payment receipt)

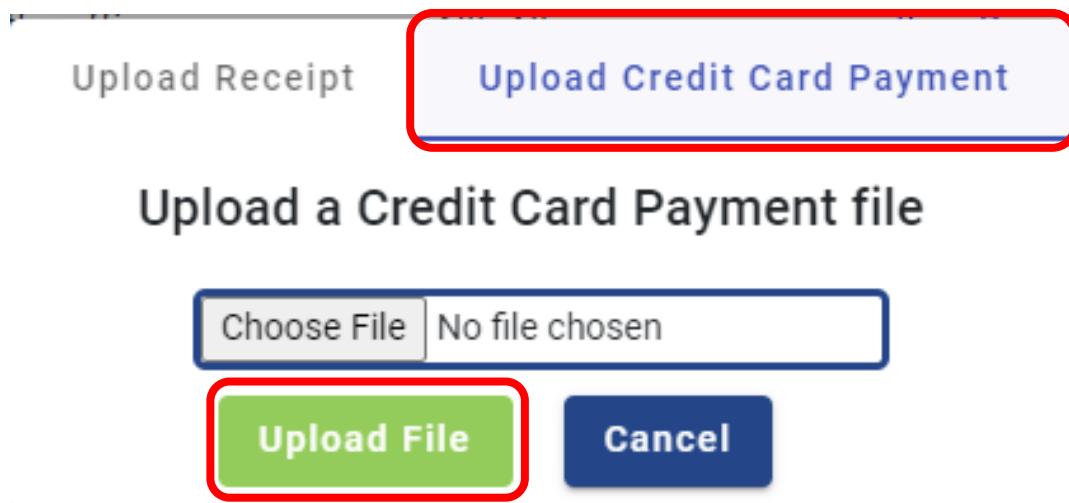


Figure 1 Click Upload File Upload Credit Card Payment Proof of Payment

1. **Upload a Credit Card Payment file**: Provide the credit card payment file for the procurement details. (Compulsory)

### Step 3 Upload Invoice:

Upload the invoice by clicking on the “Invoice” button on the View Procurement Details screen:

MOYO		View Procurement Request Details ?					
		Administration Inventory Finance Procurement Vendor Reports Help					
		Search by Name... <input type="text"/>					
Procurement Request		Name	Description	Vendor	Status	Upload Proof of Payment	Upload Invoice
View Procurement Requests		Hot Sauces	Hot sauses for moyo	hot hotter hottest	Done	<button>Proof of Payment</button>	<button>Invoice</button>
View Pending Procurement Request		Office Upgrades	Chairs pens and keyboards for the office	AllinAll	Item Received and checked	<button>Proof of Payment</button>	<button>Invoice</button>
Place Procurement Details		Screens	New screens	TechMan	Asset Registered	<button>Proof of Payment</button>	<button>Invoice</button>
View Flagged Procurement Details		Computers	New Computers	TechMan	Awaiting Delivery	<button>Proof of Payment</button>	<button>Invoice</button>
View Procurement Details		Thurst	Wota	AllinAll	Asset To Be Registered	<button>Proof of Payment</button>	<button>Invoice</button>

Figure 1 Click Invoice View Procurement Details Button

This will navigate you to the “Upload Invoice” screen. There you will be able to upload the invoice. Click on the “Upload File” button to upload the invoice.

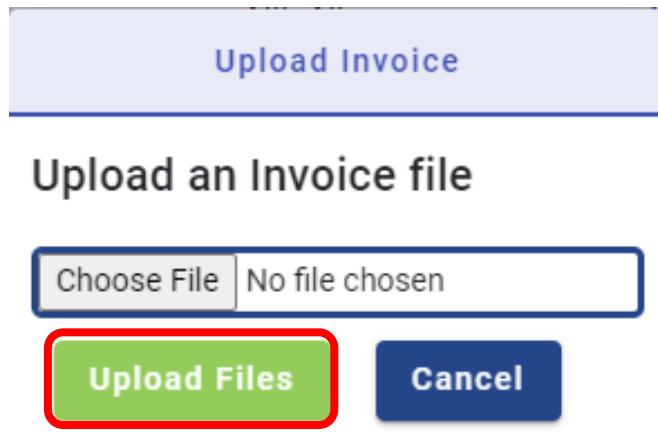


Figure 1 Click Upload File Upload Invoice

**1. Upload an Invoice file:** Provide the Invoice file for the procurement details. (Compulsory)

#### Step 4 Receive Consumable:

Create the received item by clicking on the “Receive” button on the View Procurement Details screen:

MOYO		Administration Inventory Finance Procurement Vendor Reports Help																																																
<a href="#">Procurement Request</a> <ul style="list-style-type: none"> <li><a href="#">View Procurement Requests</a></li> <li><a href="#">View Pending Procurement Request</a></li> <li><a href="#">Place Procurement Details</a></li> <li><a href="#">View Flagged Procurement Details</a></li> <li><a href="#">View Procurement Details</a></li> </ul>		<h3>View Procurement Request Details <span style="color: blue;">?</span></h3> <div style="display: flex; justify-content: space-between;"> <span>Search by Name...</span> <span><input type="button" value="Search"/></span> </div> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Name</th><th>Description</th><th>Vendor</th><th>Status</th><th>Upload Proof of Payment</th><th>Upload Invoice</th><th></th></tr> </thead> <tbody> <tr> <td>Hot Sauces</td><td>Hot sauces for moyo</td><td>hot hotter hottest</td><td>Done</td><td><a href="#">Proof of Payment</a></td><td><a href="#">Invoice</a></td><td><a href="#">Receive</a></td></tr> <tr> <td>Office Upgrades</td><td>Chairs pens and keyboards for the office</td><td>AllInAll</td><td>Item Received and Checked</td><td><a href="#">Proof of Payment</a></td><td><a href="#">Invoice</a></td><td><a href="#">Receive</a></td></tr> <tr> <td>Screens</td><td>New screens</td><td>TechMan</td><td>Asset Registered</td><td><a href="#">Proof of Payment</a></td><td><a href="#">Invoice</a></td><td><a href="#">Receive</a></td></tr> <tr> <td>Computers</td><td>New Computers</td><td>TechMan</td><td>Awaiting Delivery</td><td><a href="#">Proof of Payment</a></td><td><a href="#">Invoice</a></td><td><a href="#">Receive</a> <span style="color: red;">(edit)</span></td></tr> <tr> <td>Thurst</td><td>Wota</td><td>AllInAll</td><td>Asset To Be Registered</td><td><a href="#">Proof of Payment</a></td><td><a href="#">Invoice</a></td><td><a href="#">Receive</a> <span style="color: red;">(edit)</span></td></tr> </tbody> </table>							Name	Description	Vendor	Status	Upload Proof of Payment	Upload Invoice		Hot Sauces	Hot sauces for moyo	hot hotter hottest	Done	<a href="#">Proof of Payment</a>	<a href="#">Invoice</a>	<a href="#">Receive</a>	Office Upgrades	Chairs pens and keyboards for the office	AllInAll	Item Received and Checked	<a href="#">Proof of Payment</a>	<a href="#">Invoice</a>	<a href="#">Receive</a>	Screens	New screens	TechMan	Asset Registered	<a href="#">Proof of Payment</a>	<a href="#">Invoice</a>	<a href="#">Receive</a>	Computers	New Computers	TechMan	Awaiting Delivery	<a href="#">Proof of Payment</a>	<a href="#">Invoice</a>	<a href="#">Receive</a> <span style="color: red;">(edit)</span>	Thurst	Wota	AllInAll	Asset To Be Registered	<a href="#">Proof of Payment</a>	<a href="#">Invoice</a>	<a href="#">Receive</a> <span style="color: red;">(edit)</span>
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Thurst	Wota	AllInAll	Asset To Be Registered	<a href="#">Proof of Payment</a>	<a href="#">Invoice</a>	<a href="#">Receive</a> <span style="color: red;">(edit)</span>																																												

Figure 1 Click Receive View Procurement Details Button Consumable

This will navigate you to the “Receive Consumable” screen. There you will be able to create the item received. Click on the “Save” button to Create the received item. If The Procurement Item is a consumable.

## Receive Consumable ?

Name:	Amount Received:
Tech	0
Description: Any type of technologies	
Not more than 50 characters long.	
<span style="border: 2px solid red; padding: 2px;">Save</span> Cancel	

Figure 1 Click Upload File Upload Invoice

1. **Name**: Prefilled with item name and cannot be changed.
2. **Amount Received**: Fill in the amount of the item you received. (Compulsory)
3. **Description**: Prefilled with item description and cannot be changed.

### Step 4 Receive Asset:

Create the received item by clicking on the “Receive” button on the View Procurement Details screen:



Name	Description	Vendor	Status	Upload Proof of Payment	Upload Invoice	Invoice	Receive
Hot Sauces	Hot sauces for moyo	hot hotter hottest	Done	<button>Proof of Payment</button>	<button>Invoice</button>	<button>Invoice</button>	<button>Receive</button>
Office Upgrades	Chairs pens and keyboards for the office	AllInAll	Item Received and checked	<button>Proof of Payment</button>	<button>Invoice</button>	<button>Invoice</button>	<button>Receive</button>
Screens	New screens	TechMan	Asset Registered	<button>Proof of Payment</button>	<button>Invoice</button>	<button>Invoice</button>	<button>Receive</button>
Computers	New Computers	TechMan	Awaiting Delivery	<button>Proof of Payment</button>	<button>Invoice</button>	<button>Invoice</button>	<button>Receive</button>
Thurst	Wota	AllInAll	Asset To Be Registered	<button>Proof of Payment</button>	<button>Invoice</button>	<button>Invoice</button>	<button>Receive</button>

Figure 1 Click Receive View Procurement Details Button Asset

This will navigate you to the “Receive Asset” screen. There you will be able to create the item received. Click on the Dropdown to select the status of the asset. If The Procurement Item is an Asset.

Figure 1 Click Dropdown Receive Asset Status

- **“Item Received and Checked”:** This status is when the Asset Procurement item is received and checked.
- **“Asset To Be Registered”:** This status is when the Asset Procurement needs to be registered.
- **“Asset Registered”:** This status is when the Asset Procurement item is registered.

Once done choosing the status click the “Save” button to create the received asset item.



## Receive Asset

Asset Status:

Select\*

**Save****Cancel**

Figure 1 Click Save Receive Asset

### Explanation of the View Procurement Details statuses:

MOYO		View Procurement Request Details ?					
Procurement Request	View Procurement Requests View Pending Procurement Request Place Procurement Details View Flagged Procurement Details View Procurement Details	Name	Description	Vendor	Status	Upload Proof of Payment	Upload Invoice
		Hot Sauces	Hot sauses for moyo	hot.hotter.hottest	Done	<span>Proof of Payment</span>	<span>Invoice</span>
		Office Upgrades	Chairs pens and keyboards for the office	AllinAll	Item Received and checked	<span>Proof of Payment</span>	<span>Invoice</span>
		Screens	New screens	TechMan	Asset Registered	<span>Proof of Payment</span>	<span>Invoice</span>
		Computers	New Computers	TechMan	Awaiting Delivery	<span>Proof of Payment</span>	<span>Invoice</span>
		Thurst	Wota	AllinAll	Asset To Be Registered	<span>Proof of Payment</span>	<span>Invoice</span>

Figure 1 View Procurement Details Status

- **Done:** If the status is Done that means that the procurement request is finished.
- **Item Received and Checked:** If the status is Item Received and Checked that means that the asset item from the procurement request is received and has been checked.
- **Asset Registered:** If the status is Asset Registered that means that the asset item from the procurement request has been receive and has been registered.
- **Awaiting Delivery:** If the status is Awaiting Delivery that means that the procurement item request has not yet been received.
- **Asset to be Registered:** If the status is Asset to be Registered that means that the asset item from the procurement request has been receive but not yet registered.



# Vendor Section

## Onboard Request:

Create Onboard Request, Edit Onboard Request, and Delete Onboard Request:

Step 1 Navigate to Onboard Request screen:

Navigate to the Onboard Request Screen by clicking on the “Vendor” button on the top navbar or on the “Vendor” button on the home screen:

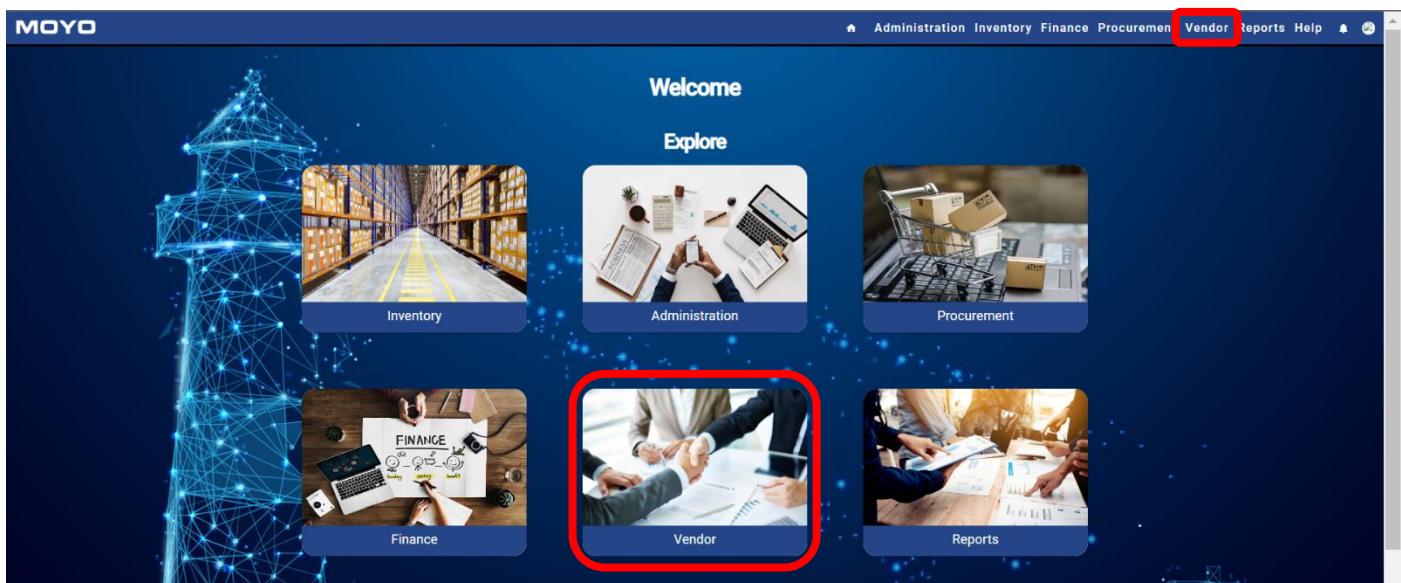


Figure 1 Home Screen to Onboard Request Screen

Then Click on the “Onboard Request” button on the Vendor side navbar:

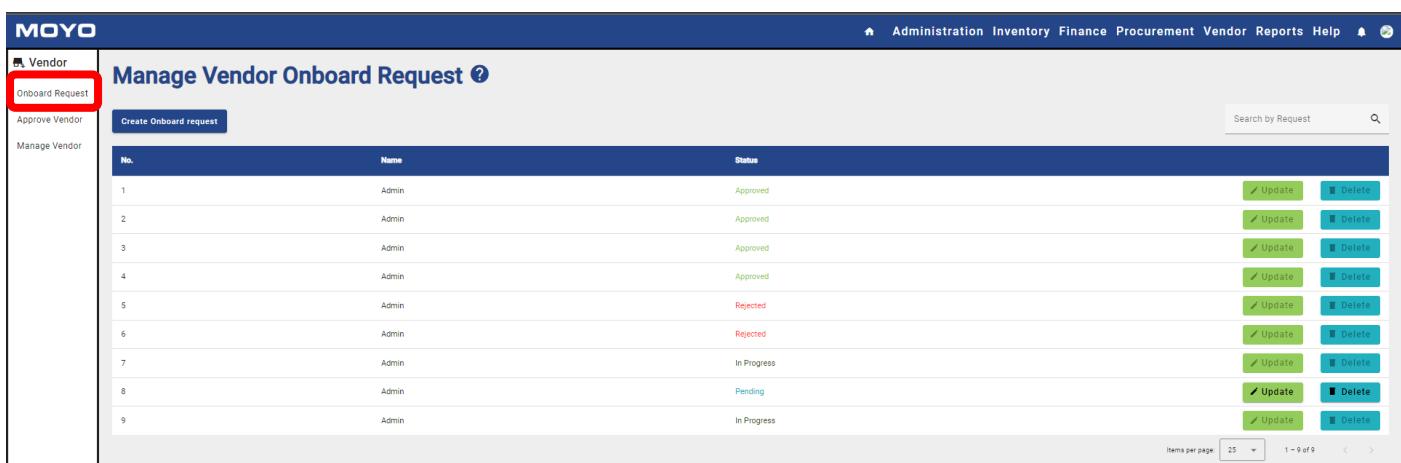


Figure 1 Vendor side nav to Onboard Request Screen



## Step 2 Create Onboard Request:

Create a new Onboard Request by clicking on the “Create Onboard Request” button on the Onboard Request screen:

The screenshot shows a list of vendor onboard requests with columns for No., Name, and Status. Each row has 'Update' and 'Delete' buttons. A search bar is at the top right, and a navigation bar with links like Administration, Inventory, Finance, Procurement, Vendor, Reports, Help, and a user icon is at the top right.

No.	Name	Status	Action	Action
1	Admin	Approved	<input type="button" value="Update"/>	<input type="button" value="Delete"/>
2	Admin	Approved	<input type="button" value="Update"/>	<input type="button" value="Delete"/>
3	Admin	Approved	<input type="button" value="Update"/>	<input type="button" value="Delete"/>
4	Admin	Approved	<input type="button" value="Update"/>	<input type="button" value="Delete"/>
5	Admin	Rejected	<input type="button" value="Update"/>	<input type="button" value="Delete"/>
6	Admin	Rejected	<input type="button" value="Update"/>	<input type="button" value="Delete"/>
7	Admin	In Progress	<input type="button" value="Update"/>	<input type="button" value="Delete"/>
8	Admin	Pending	<input type="button" value="Update"/>	<input type="button" value="Delete"/>
9	Admin	In Progress	<input type="button" value="Update"/>	<input type="button" value="Delete"/>

Figure 1 Click Create Onboard Request Button

This will navigate you to the “Create Onboard Request” screen where you will be able to create the new Onboard Request. If you want to create a general supplier, click on the General Supplier radio button. Once done click the “Create” button create the onboard request. (\*Note General supplier requires minimum of 3 Quotes with one being the preferred vendor. You can add more quote by clicking on the + icon button if needed)

The form asks to select one of two options: General suppliers (radio button selected) or Sole suppliers. It has sections for Quotation 1, Quotation 2, and Quotation 3. The Quotation 3 section has a '+'. Below are fields for Company Name, Company Email, Company Quote (with a file input), and Select as preferred vendor (checkbox). At the bottom are 'Create' and 'Cancel' buttons.

Figure 1 Click Create Onboard Request Button General Supplier



5. **“Company Name”:** Fill in the name of all the onboard companies. (Compulsory. Must be one for all quotes)
6. **“Company Email”:** Fill in the email of all the onboard companies. (Compulsory. Must be one for all quotes)
7. **“Company Quote”:** Provide the quotes of all the onboard companies. (Compulsory. Must be one for all quotes) (This is done for comparisons)
8. **Select as a preferred vendor”:** Check the checkbox for your preferred vendor. (Compulsory. Only one quote can be your preferred vendor)

If you want to create a Sole Supplier, click on the Sole Supplier radio button. Once done click the “Create” button create the onboard request. (\*Note Sole Supplier can only be one quote. Sole Suppliers can only be used up to 3 times before requiring permission to continue using)

The screenshot shows a modal window titled "Create Vendor Onboard Request". It contains a note "Please select one of the two options:" with two radio buttons: "General suppliers" (unchecked) and "Sole suppliers" (checked, highlighted with a red box). Below are four input fields: "Company name:", "Company Email:", "Reason:", and "Company Quote:". The "Company name:" field has a placeholder "Company Name". The "Company Email:" field has a placeholder "Company Email". The "Reason:" field has a placeholder "Reason". The "Company Quote:" field has a placeholder "Choose File No file chosen". At the bottom are two buttons: a green "Create" button (highlighted with a red box) and a blue "Cancel" button.

Figure 1 Click Create Onboard Request Button Sole Supplier

1. **“Company Name”:** Fill in the name of the onboard company. (Compulsory)
2. **“Company Email”:** Fill in the email of the onboard company. (Compulsory)
3. **“Company Quote”:** Provide the quote of the onboard company. (Compulsory)



### Step 3 Edit Onboard Request:

Edit an Onboard Request by clicking on the “Edit” button on the Onboard Request screen within the Onboard Request table: (The row you chose is the Onboard Request you will be editing) (\*Note only Onboard Requests with the status of “Pending can be edited or deleted.)

No.	Name	Status	Actions
1	Admin	Approved	<input type="button" value="Update"/> <input type="button" value="Delete"/>
2	Admin	Approved	<input type="button" value="Update"/> <input type="button" value="Delete"/>
3	Admin	Approved	<input type="button" value="Update"/> <input type="button" value="Delete"/>
4	Admin	Approved	<input type="button" value="Update"/> <input type="button" value="Delete"/>
5	Admin	Rejected	<input type="button" value="Update"/> <input type="button" value="Delete"/>
6	Admin	Rejected	<input type="button" value="Update"/> <input type="button" value="Delete"/>
7	Admin	In Progress	<input type="button" value="Update"/> <input type="button" value="Delete"/>
8	Admin	Pending	<input checked="" type="button" value="Update"/> <input type="button" value="Delete"/>
9	Admin	In Progress	<input type="button" value="Update"/> <input type="button" value="Delete"/>

Figure 1 Click Edit Budget Category Button.

This will navigate you to the “Edit Onboard Request” screen where you will be able to Edit the Onboard Request. Click on the “Update” button to edit the Onboard Request. (All Details are prefilled) (\*Note the onboard request you are editing is a General Supplier you will be able to edit all the quotes and you will also be able to add more quotes by clicking on the + icon button. If the Onboard Request is a Sole Supplier, you will be able to edit that one quote)



Quotation 1      Quotation 2      Quotation 3

Company Name: AllInAll

Company Email: AllInAll@gmail.com

New Company Quote: Choose File No file chosen

View current Company Quote: [Business Unit Allocation Report \(1\).pdf](#)

Select as preferred vendor:

**Update**      Cancel

Figure 1 Click Update Edit Onboard Request Button General Supplier

1. **Company Name**: Change the name of all the onboard companies. (Not Compulsory. All Quotes are editable)
2. **Company Email**: Change the email of all the onboard companies. (Not Compulsory. All Quotes are editable)
3. **Company Quote**: Provide the quotes of all the onboard companies. (Not Compulsory. All Quotes are editable)
4. **Select as a preferred vendor**: Check the checkbox for your preferred vendor. (Not Compulsory. All Quotes are editable)

Company name: SoleWorld

Company Email: SoleWorld@gmail.com

Reason: Sole Supplietr Example

Current Company Quote: [Vendor Spent Report \(5\).pdf](#)

New Company Quote: Choose File No file chosen

**Update**      Cancel

Figure 1 Click Update Edit Onboard Request Button Sole Supplier



1. **“Company Name”:** Change the name of the onboard company. (Not Compulsory)
2. **“Company Email”:** Change the email of the onboard company. (Not Compulsory)
3. **“Company Quote”:** Provide the quotes of the onboard company. (Not Compulsory)

## Step 4 Delete Onboard Request:

Delete a Onboard Request by clicking on the “Delete” button on the Onboard Request screen within the Onboard Request table: (The row you chose is the Onboard Request you will be deleting)

No.	Name	Status	Actions
1	Admin	Approved	<input type="button" value="Update"/> <input type="button" value="Delete"/>
2	Admin	Approved	<input type="button" value="Update"/> <input type="button" value="Delete"/>
3	Admin	Approved	<input type="button" value="Update"/> <input type="button" value="Delete"/>
4	Admin	Approved	<input type="button" value="Update"/> <input type="button" value="Delete"/>
5	Admin	Rejected	<input type="button" value="Update"/> <input type="button" value="Delete"/>
6	Admin	Rejected	<input type="button" value="Update"/> <input type="button" value="Delete"/>
7	Admin	In Progress	<input type="button" value="Update"/> <input type="button" value="Delete"/>
8	Admin	Pending	<input type="button" value="Update"/> <input type="button" value="Delete"/>
9	Admin	In Progress	<input type="button" value="Update"/> <input type="button" value="Delete"/>

Figure 1 Click Delete Onboard Request Button

This will navigate you to the “Delete Onboard Request” screen where you will be able to delete the Onboard Request. Click on the “Yes” button to delete the Onboard Request. (\*Note General Suppliers will list all the quotes being deleted, while Sole Supplier List the one quote being deleted)



## DELETE ONBOARD REQUEST ?

You are about to delete the request no: 10

Containing The following company's:

- NewWorld
- AllInAll
- OneStop

Are you sure you want to continue?

Yes

Cancel

Figure 1 Click Yes Delete Onboard Request Button General Supplier

## DELETE ONBOARD REQUEST ?

You are about to delete the request no: 11

Containing The following company's:

- SoleWorld

Are you sure you want to continue?

Yes

Cancel

Figure 1 Click Yes Delete Onboard Request Button Sole Supplier



hello@moyoafrika.com



Building D, 242 on Jean Avenue, Centurion



+27 (0) 12 664 1392

MOYO

## Explanation of the Onboard Request statuses:

No.	Name	Status	Actions
1	Admin	Approved	<button>Update</button> <button>Delete</button>
2	Admin	Approved	<button>Update</button> <button>Delete</button>
3	Admin	Approved	<button>Update</button> <button>Delete</button>
4	Admin	Approved	<button>Update</button> <button>Delete</button>
5	Admin	Rejected	<button>Update</button> <button>Delete</button>
6	Admin	Rejected	<button>Update</button> <button>Delete</button>
7	Admin	In Progress	<button>Update</button> <button>Delete</button>
8	Admin	Pending	<button>Update</button> <button>Delete</button>
9	Admin	In Progress	<button>Update</button> <button>Delete</button>

Figure 1 Delegation Status

- **Approved:** If the status is Approved that means that the vendor onboarding request has been approved and onboarded onto the system. The now approved vendor can be added to the system.
- **Rejected:** If the status is Rejected that means that the vendor onboarding request has been rejected and the vendor will not be onboarded on the system.
- **In Progress:** If the status is In Progress that means that the vendor onboarding request has been approved but is still being onboarded onto the system.
- **"Pending":** If the status is Pending that means that the vendor onboarding request is still waiting to be approved or rejected.



## Approve Vendor:

Filter, Approve or Reject Sole Supplier, Approve or Reject General Supplier, Add Sole Supplier Due Diligence Checklist, Update Due Diligence Checklist, and View Supplier Details, :

### Step 1 Navigate to Approve Vendor screen:

Navigate to the Approve Vendor Screen by clicking on the “Vendor” button on the top navbar or on the “Vendor” button on the home screen:

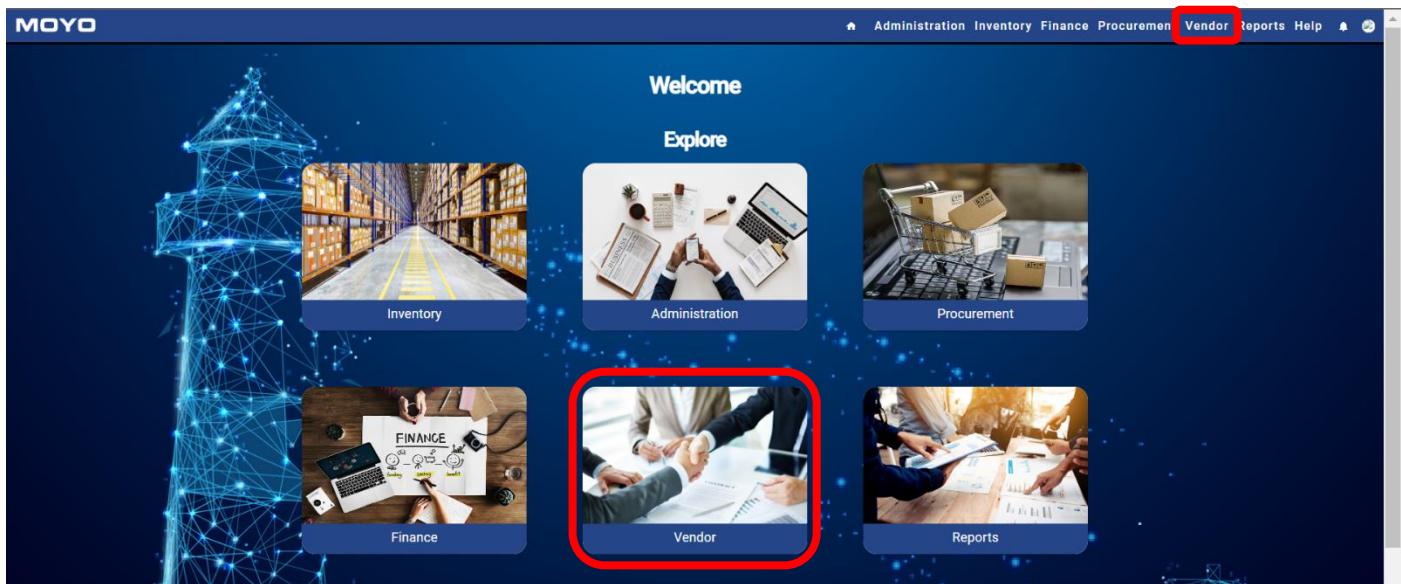


Figure 1 Home Screen to Approve Vendor Screen

Then Click on the “Approve Vendor” button on the Vendor side navbar:

Approve Vendor		Manage Approved or Pending Onboard Requests ?				
	Onboard Request Number	Selected Option	Request Type	Total Quotes	Created By	
1	srgs	Sole Supplier	1	Admin	<a href="#">Update</a> <a href="#">View</a>	<a href="#">Edit</a> <a href="#">Delete</a>
2	erfvergy	General Suppliers	3	Admin	<a href="#">Update</a> <a href="#">View</a>	<a href="#">Edit</a> <a href="#">Delete</a>
3	hot hotter hottest	General Suppliers	3	Admin	<a href="#">Update</a> <a href="#">View</a>	<a href="#">Edit</a> <a href="#">Delete</a>
4	SoleSuppliers	Sole Supplier	1	Admin	<a href="#">Update</a> <a href="#">View</a>	<a href="#">Edit</a> <a href="#">Delete</a>
7	Request pending	Sole Supplier	1	Admin	<a href="#">Update</a> <a href="#">Add</a>	<a href="#">Edit</a> <a href="#">Delete</a>
8	Request pending	General Suppliers	4	Admin	<a href="#">Update</a> <a href="#">View</a>	<a href="#">Edit</a> <a href="#">Delete</a>
9	Request pending	Sole Supplier	1	Admin	<a href="#">Update</a> <a href="#">Add</a>	<a href="#">Edit</a> <a href="#">Delete</a>
10	Request pending	General Suppliers	3	Admin	<a href="#">Update</a> <a href="#">View</a>	<a href="#">Edit</a> <a href="#">Delete</a>
11	Request pending	Sole Supplier	1	Admin	<a href="#">Update</a> <a href="#">View</a>	<a href="#">Edit</a> <a href="#">Delete</a>
12	Request pending	Sole Supplier	1	Admin	<a href="#">Update</a> <a href="#">View</a>	<a href="#">Edit</a> <a href="#">Delete</a>

Figure 1 Vendor side nav to Approve Vendor Screen



## Step 2 Filter:

Filter the Approve vendor table by clicking on the “Filter By” dropdown and choose the filter you want. (The filter will automatically be set to All)

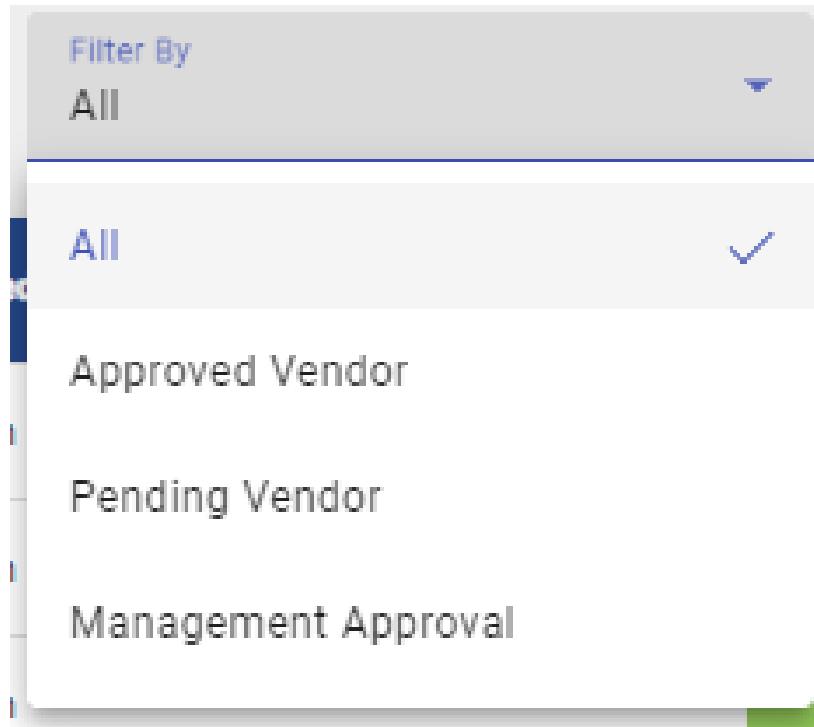


Figure 1 Filter Approve Vendor Button

- **All**: Show all vendors in approve vendor table.
- **Approved Vendor**: Show only the approved vendors in approve vendor table.
- **Pending Vendor**: Show the general suppliers waiting for approval and the sole suppliers waiting for added due diligence checklist in approve vendor table.
- **Management Approval**: Show only sole suppliers waiting for approval in approve vendor table.



## Step 3 Approve or Reject Sole Supplier:

Approve or Reject the Sole Supplier vendor by clicking on the “View” button on the approve vendor table on the approve vendor screen. (\*Note filter by Management Approval to make it easier to find)

Onboard Request Number	Selected Option	Request Type	Total Quotes	Created By	Action Buttons
11	Request pending	Sole Supplier	1	Admin	<button>Update</button> <button>View</button>
12	Request pending	Sole Supplier	1	Admin	<button>Update</button> <button>View</button>

Figure 1 Click View Sole Supplier Approve Vendor Button

This will navigate you to the “Onboard Request Approval” screen. There you will be able to approve or reject the sole supplier onboard request. Click on the “Approve” button to approve the sole supplier or click on the “Reject” button to reject to sole supplier.

Onboard Request #11 ?

Please Approve or Reject the Request

Company Name: SoleWorld

Company Email: SoleWorld@gmail.com

Reason: Sole Supplietr Example

Company Quote: [Vendor Spent Report \(5\).pdf](#)

**Approve** **Reject**

Figure 1 Approve/Reject Sole Supplier



## Step 4 Approve or Reject General Supplier:

Approve or Reject the General Supplier vendor by clicking on the “View” button on the approve vendor table on the approve vendor screen. (\*Note filter by Pending Approval to make it easier to find)

Onboard Request Number	Selected Option	Request Type	Total Quotes	Created By	Action
7	Request pending	Sole Supplier	1	Admin	<button>Update</button>
8	Request pending	General Suppliers	4	Admin	<button>Update</button>
9	Request pending	Sole Supplier	1	Admin	<button>Update</button>
10	Request pending	General Suppliers	3	Admin	<button>Add</button> <button>View</button>

Figure 1 Click View General Supplier Approve Vendor Button

This will navigate you to the “Onboard Request Approval” screen. There you will be able to approve or reject the general supplier onboard request. Click on the confirm select quote of the quote you want to approve then click the “Continue” button to approve the general supplier or click on the “Reject Request” button to reject to general supplier (it does not matter what quote you reject if one is rejected all will be rejected). (\*Note to navigate through the quote click on the “Quote \_” [\_being number] tab)

Onboard Request #10 ?

Please select one of the 3 options:

Quotation 1	Quotation 2	Quotation 3
Company Name: AllInAll		
Company Email: AllInAll@gmail.com		
Company Quote: <a href="#">Business Unit Allocation Report (1).pdf</a>		
Preferred vendor: <input checked="" type="checkbox"/>		
Confirm selected quote: <input checked="" type="checkbox"/>		
<a href="#">Continue</a>		
<a href="#">Back</a>	<a href="#">Reject Request</a>	



Figure 1 Approve/Reject General Supplier

1. **"Confirm selected quote":** check the checkbox if you want to approve the general supplier and be able to click the continue button. (Compulsory if you want to approve the vendor)

If you clicked the “Continue” button the system will navigate you to the “Due Diligence Checklist” screen. There you will follow a 10-step process to complete the due diligence checklist and approve the general supplier vendor. Step one you will complete the “Due Diligence Checklist Details” and click the “Next” button to move onto step two. (\*Note if you clicked on the “Reject Quote” button you have successfully rejected the general supplier vendor)

The screenshot shows a web-based form titled "Due Diligence Checklist". At the top, it says "Please fill in the following details:" followed by a "DUE DILIGENCE CHECKLIST DETAILS" section. Below this is a question: "Do you have a physical copy of the Due Diligence Checklist?". Two buttons are at the bottom: "Cancel" and "Next", with "Next" being highlighted with a red box.

Figure 1 Click Next Due Diligence Checklist Details Approve Vendor Button

- 1 **"Do you have a physical copy of the due diligence checklist?":** Check the Checkbox if you have a physical copy of the due diligence checklist of the company. (Not Compulsory)

Step two edit the “Foundational Documents” and click the “Next” button to move onto step three. (Fields that are required will state so)



**Due Diligence Checklist?**  
Please fill in the following details:

DUE DILIGENCE CHECKLIST DETAILS  
 FOUNDATIONAL DOCUMENTS

Mutual Non-Disclosure Agreement or Confidentiality Agreement:	<input type="checkbox"/>
Basic Company Information: <b>(Required)</b>	<input type="checkbox"/>
Ownership structure and affiliated entities:	<input type="checkbox"/>
Income tax number: <b>(Required)</b>	<input type="checkbox"/>
VAT number:	<input type="checkbox"/>
Company registration document:	<input type="checkbox"/>
Letters of good standing COID:	<input type="checkbox"/>
Has BEE?:	<input checked="" type="checkbox"/>
BEE level:	<input type="text" value="1"/>
BEE Certificate:	<input type="file" value="Choose File No file chosen"/>
Date of BEE validity:	<input type="date" value="Choose a date* MM/DD/YYYY"/>
Directors details and ID's:	<input type="checkbox"/>
Company Resolution Agreement:	<input type="checkbox"/>

**Back** **Next**

Figure 1 Click Next Foundational Documents Approve Vendor Button.

1. **Mutual Non-Disclosure Agreement or Confidentiality Agreement**: Check the Checkbox if there is a mutual non-disclosure agreement or confidentiality agreement of the company. (Not Compulsory)
2. **Basic Company Information**: Check the Checkbox if you have the basic company information of the company. (Compulsory)
3. **Ownership Structure and Affiliated Entities**: Check the checkbox if you the company has ownership structure and affiliated entities details. (Not Compulsory)
4. **Income tax Number**: Check the Checkbox if you have the income tax number of the company. (Compulsory)
5. **Company Registration Document**: Check the Checkbox if you have the company registration document of the company. (Not Compulsory)
6. **Letter of Good Standing COID**: Check the Checkbox if you have the letter of co standing of the company. (Not Compulsory)
7. **Has BEE?**: Check the Checkbox if the company has BEE. (Compulsory)
  - **BEE Level**: Fill in the company's BEE level. (Compulsory)
  - **BEE Certificate**: Provide the company's BEE certificate. (Compulsory)
  - **Date of BEE Validity**: Choose the date of the company's date of BEE validity using a date picker. (Compulsory)
8. **Directors Details and ID's**: Check the Checkbox if you have the directors' details and ID's of the company. (Not Compulsory)



9. **“Company Resolution Agreement”:** Check the Checkbox if you have the resolution agreement of the company. (Not Compulsory)

**Step three edit the “Financials” and click the “Next” button to move onto step four. (Fields that are required will state so)**

**Due Diligence Checklist** ?  
Please fill in the following details:

- DUE DILIGENCE CHECKLIST DETAILS
- FOUNDATIONAL DOCUMENTS
- FINANCIALS

VAT Registration Certificate:	<input type="checkbox"/>
Tax Clearance Certificate:	<input type="checkbox"/>
Bank Stamped confirmation letter:	<input type="checkbox"/>

[Back](#) [Next](#)

Figure 1 Click Next Financials Approve Vendor Button.

- “Vat Registration Certificate”:** Check the Checkbox if you have the VAT registration certificate of the company. (Not Compulsory)
- “TAX Clearance Certificate”:** Check the Checkbox if you have the TAX clearance certificate of the company. (Not Compulsory)
- “Bank Stamped Confirmation Letter”:** Check the checkbox if you have the bank stamped confirmation letter of the company. (Not Compulsory)

**Step four edit the “Sub-Contruction” and click the “Next” button to move onto step five. (Fields that are required will state so)**

**Due Diligence Checklist** ?  
Please fill in the following details:

- DUE DILIGENCE CHECKLIST DETAILS
- FOUNDATIONAL DOCUMENTS
- FINANCIALS
- SUB-CONTRACTING

Name of sub-contractor:	<input type="checkbox"/>
Provide similar documents as for main supplier (in case of company):	<input type="checkbox"/>
Provide copy of ID, qualifications, accreditations and professional memberships (in case of individual):	<input type="checkbox"/>

[Back](#) [Next](#)

Figure 1 Click Next Sub-Contracting Approve Vendor Button.



1. **Name of Sub-Contractor**: Check the Checkbox if you have the name of the sub-contractor of the company. (Not Compulsory)
2. **Provide similar documents as for main supplier (In case of company)**: Check the Checkbox if you have the similar documents of main supplier of the company. (Not Compulsory)
3. **Provide copy of ID, qualifications, accreditations and professional memberships (In case of individual)**: Check the checkbox if you have the copy of ID's, qualifications, accreditations, and professional memberships of the individual. (Not Compulsory)

**Step Five edit the “Insurance” and click the “Next” button to move onto step six. (Fields that are required will state so)**

**Due Diligence Checklist?**  
Please fill in the following details:

- DUE DILIGENCE CHECKLIST DETAILS
- FOUNDATIONAL DOCUMENTS
- FINANCIALS
- SUB-CONTRACTING
- INSURANCE

General liability insurance:

Add new General liability Insurance Document?  No file chosen

Cyber insurance:

Add a new Cyber Insurance Document?  No file chosen

Professional indemnity insurance (if applicable):

Add a new Professional Indemnity Insurance Document?  No file chosen

Other specific insurance required per service/industry:

Add new Other specific insurance Document?  No file chosen

[Back](#) Next

Figure 1 Click Next Insurance Approve Vendor Button.

1. **General Liability Insurance**: Check the Checkbox if you have the general liability insurance of the company. (Not Compulsory)
  - **Add new General liability Insurance Document?**: Provide the general liability insurance document of the company. (Compulsory)
2. **Cyber insurance:**: Check the Checkbox if you have the Cyber Insurance of the company. (Not Compulsory)



- "Add a new Cyber Insurance Document?": Provide the cyber insurance document of the company. (Compulsory)
3. "Professional indemnity insurance (if applicable):": Check the checkbox if you have the professional indemnity insurance of the company. (Not Compulsory)
- "Add a new Professional Indemnity Insurance Document?": Provide the professional indemnity insurance document of the company. (Compulsory)
4. "Other specific insurance required per service/industry": Check the checkbox if you have other specific insurance of the company. (Not Compulsory)
- "Add new Other specific insurance Document?": Provide the other specific insurance document of the company. (Compulsory)

**Step six edit the “License or Professional Accreditation” and click the “Next” button to move onto step seven. (Fields that are required will state so)**

**Due Diligence Checklist?**  
Please fill in the following details:

DUE DILIGENCE CHECKLIST DETAILS  
 FOUNDERAL DOCUMENTS  
 FINANCIALS  
 SUB-CONTRACTING  
 INSURANCE

LICENSES OR PROFESSIONAL ACCREDITATION

Licenses required:	<input type="checkbox"/>
Accreditation required:	<input type="checkbox"/>
Professional membership required:	<input type="checkbox"/>

**Back** **Next**

Figure 1 Click Next License or professional accreditation Approve Vendor Button.

1. "Licenses required:": Check the Checkbox if the license is required of the company. (Not Compulsory)
2. "Accreditation required:": Check the Checkbox if accreditation is required of the company. (Not Compulsory)
3. "Professional membership required": Check the checkbox if professional membership is required of the company. (Not Compulsory)

**Step seven edit the “Information Security” and click the “Next” button to move onto step eight. (Fields that are required will state so)**



The screenshot shows a web-based vendor approval form. On the left, there's a sidebar with three categories: 'INSURANCE' (with a blue icon), 'LICENCES OR PROFESSIONAL ACCREDITATION' (with a blue icon), and 'INFORMATION SECURITY' (with a grey icon). The main content area is titled 'Information Security' and contains several questions with checkboxes. One question, 'Protection of personal information by design', has a checked checkbox. Another question, 'Does the contract set out what personal data is used for what purpose?', has a '(Required)' label and an unchecked checkbox. A dropdown menu labeled 'Controller (C)' is shown. At the bottom, there are 'Back' and 'Next' buttons, with the 'Next' button being highlighted with a red box.

Figure 1 Click Next Information Security Approve Vendor Button.

1. **Business continuity plan**: Check the Checkbox if you have the business community plan of the company. (Not Compulsory)
2. **Disaster recovery plan**: Check the Checkbox if you have the disasters recovery plan of the company. (Not Compulsory)
3. **Protection of personal information by design**: Check the checkbox if you have the protection of personal information by design of the company. (Not Compulsory)
  - **Does the contract set out what personal data is used for what purpose?**: Check the checkbox if the contract sets out what personal data is used of the company. (Compulsory)
  - **Is the contracted partner a controller (C), joint controller (JC), processor (P) or sub-processor (SP)?**: Choose one of the options of the company. (Compulsory)
  - **Depending on the controller/processor relationship, do you have a Data Processing Agreement or a Joint Controller Agreement in place?**: Check the checkbox if you have the data processing agreement or joint controller agreement in place with the company. (Compulsory)
  - **Does the contract highlight the importance of confidentiality?**: Check the checkbox if the contract highlights the importance of confidentiality. (Compulsory)



## Step 8

- **“Does the contract provide for audits and inspections?”:** Check the checkbox if the contract provided audits and inspections. (Compulsory)
  - **“Is it clear who is accountable and liable for different activities?”:** Check the checkbox if the contract is clear on who is accountable and liable for different activities. (Compulsory)
  - **“Is there a provision to cover third party processing of data?”:** Check the checkbox if there is a proven to cover third party processing of data efforts of the company. (Compulsory)
  - **“Does a process exist for managing data when the contract ends?”:** Check the checkbox if a processing does exist for managing date when the contract ends. (Compulsory)
  - **“Is the personal data that's being processed detailed in your and their 'Record of Processing Activities'?”:** Check the checkbox if the professional data that is being processed detailed in, you're and the company's 'Record of Processing Activities'. (Compulsory)
  - **“Does the supplier hold any form of certification for their processing activities?”:** Check the checkbox if the supplier holds any form of certification of their processing activities of the company. (Compulsory)
4. **“History of data breaches and security incidents”:** Check the checkbox if you have the History of data breaches and security incidents of the company. (Not Compulsory)
5. **“Site visits to assess security controls (if required)”:** Check the checkbox if you have site visits to assess security controls of the company. (Not Compulsory)

**Step eight edit the “Policy Review” and click the “Next” button to move onto step nine. (Fields that are required will state so)**



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**MOYO**

DUE DILIGENCE CHECKLIST DETAILS

FOUNDATIONAL DOCUMENTS

FINANCIALS

SUB-CONTRACTING

INSURANCE

LICENCES OR PROFESSIONAL ACCREDITATION

INFORMATION SECURITY

POLICY REVIEW

Information security or Data protection policy:

Privacy policy:

Data retention and destruction policy:

Anti-bribery and anti-corruption policy:

Ethics policy:

Conflict of interest policy:

Customer complaints policy:

Back Next

Figure 1 Click Next Policy Review Approve Vendor Button.

1. **Information security or Data protection policy**: Check the Checkbox if you have the Information security or Date protection policy of the company. (Not Compulsory)
2. **Privacy policy**: Check the Checkbox if you have the privacy policy of the company. (Not Compulsory)
3. **Data retention and destruction policy**: Check the checkbox if you have the data retention and destruction policy of the company. (Not Compulsory)
4. **Anti-bribery and anti-corruption policy**: Check the checkbox if you have the anti-bribery and anti-corruption policy of the company. (Not Compulsory)
5. **Ethics policy**: Check the checkbox if you have the ethics policy of the company. (Not Compulsory)
6. **Conflict of interest policy**: Check the checkbox if you have the conflict-of-interest policy of the company. (Not Compulsory)
7. **Customer complaints policy**: Check the checkbox if you have the customer complaints policy of the company. (Not Compulsory)

**Step nine edit the “Business References” and click the “Next” button to move onto step ten. (Fields that are required will state so)**



The screenshot shows a web-based application interface for a 'Due Diligence Checklist'. At the top, there's a navigation bar with links for Administration, Inventory, Finance, Procurement, Vendor, Reports, Help, and user icons. Below the header, the title 'MOYO' is displayed. The main content area is titled 'Due Diligence Checklist?'. A sub-instruction 'Please fill in the following details:' is present. On the left, a vertical list of checklist items is shown, each preceded by a checkbox icon:

- DUE DILIGENCE CHECKLIST DETAILS
- FOUNDATIONAL DOCUMENTS
- FINANCIALS
- SUB-CONTRACTING
- INSURANCE
- LICENSES OR PROFESSIONAL ACCREDITATION
- INFORMATION SECURITY
- POLICY REVIEW
- BUSINESS REFERENCES

Below this list is a text input field labeled 'Details of at least two business references:' with a placeholder '(checkbox)' and a red-bordered 'Next' button. At the bottom of the page, there are 'Back' and 'Next' buttons.

Figure 1 Click Next Business References Approve Vendor Button.

1. **"Details of at least two business references":** Check the Checkbox if you have at least two business references of the company. (Not Compulsory)

**Step ten “Done” and click the “Create” button. Once you clicked the create button the Due Diligence checklist of the vendor will be create on the system and the general supplier will be approved on the system.**

This screenshot shows the same 'Due Diligence Checklist?' page as the previous one, but with a different set of items listed on the left. The items are identical to the first list but include an additional item at the bottom:

- DUE DILIGENCE CHECKLIST DETAILS
- FOUNDATIONAL DOCUMENTS
- FINANCIALS
- SUB-CONTRACTING
- INSURANCE
- LICENSES OR PROFESSIONAL ACCREDITATION
- INFORMATION SECURITY
- POLICY REVIEW
- BUSINESS REFERENCES
- Done

At the bottom of the page, there is a message: '\*Please ensure that all details are correct\*' above a row of buttons: 'Back' (blue), 'Create' (red-bordered), and 'Next' (disabled grey). The 'Create' button is highlighted with a red border.

Figure 1 Click Create Done Approve Vendor Button.



## Step 5 Add Sole Supplier Due Diligence Checklist:

Add the Sole Supplier vendor by clicking on the “Add” button on the approve vendor table on the approve vendor screen. (\*Note filter by Pending Approval to make it easier to find. You can only add the due diligence checklist to the sole supplier after the sole supplier has been approved)

Onboard Request Number	Selected Option	Request Type	Total Quotes	Created By	Action	Action
7	Request pending	Sole Supplier	1	Admin	<input type="button" value="Update"/>	<input checked="" type="button" value="Add"/>
8	Request pending	General Suppliers	4	Admin	<input type="button" value="Update"/>	<input checked="" type="button" value="View"/>
9	Request pending	Sole Supplier	1	Admin	<input type="button" value="Update"/>	<input checked="" type="button" value="Add"/>
10	Request pending	General Suppliers	3	Admin	<input type="button" value="Update"/>	<input checked="" type="button" value="View"/>

Figure 1 Click Add Sole Supplier Approve Vendor Button

This will navigate you to the “Due Diligence Checklist” screen. There you will be able to add the due diligence checklist of the sole supplier on the system. This is done by following a 10-step process to complete the due diligence checklist and add it to the sole supplier on the system. Step one you will complete the “Due Diligence Checklist Details” and click the “Next” button to move onto step two.

Do you have a physical copy of the Due Diligence Checklist?

Figure 1 Click Next Due Diligence Checklist Details Approve Vendor Button Sole Supplier

**1 “Do you have a physical copy of the due diligence checklist?”:** Check the Checkbox if you have a physical copy of the due diligence checklist of the company. (Not Compulsory)

Step two edit the “Foundational Documents” and click the “Next” button to move onto step three. (Fields that are required will state so)



**Due Diligence Checklist?**  
Please fill in the following details:

DUE DILIGENCE CHECKLIST DETAILS  
 FOUNDATIONAL DOCUMENTS

Mutual Non-Disclosure Agreement or Confidentiality Agreement:	<input type="checkbox"/>
Basic Company Information: <b>(Required)</b>	<input type="checkbox"/>
Ownership structure and affiliated entities:	<input type="checkbox"/>
Income tax number: <b>(Required)</b>	<input type="checkbox"/>
VAT number:	<input type="checkbox"/>
Company registration document:	<input type="checkbox"/>
Letters of good standing COID:	<input type="checkbox"/>
Has BEE?:	<input checked="" type="checkbox"/>
BEE level:	1
BEE Certificate:	<input type="file"/> No file chosen
Date of BEE validity:	Choose a date* MM/DD/YYYY
Directors details and ID's:	<input type="checkbox"/>
Company Resolution Agreement:	<input type="checkbox"/>

**Back** **Next**

Figure 1 Click Next Foundational Documents Approve Vendor Button Sole Supplier

1. **Mutual Non-Disclosure Agreement or Confidentiality Agreement**: Check the Checkbox if there is a mutual non-disclosure agreement or confidentiality agreement of the company. (Not Compulsory)
2. **Basic Company Information**: Check the Checkbox if you have the basic company information of the company. (Compulsory)
3. **Ownership Structure and Affiliated Entities**: Check the checkbox if you the company has ownership structure and affiliated entities details. (Not Compulsory)
4. **Income tax Number**: Check the Checkbox if you have the income tax number of the company. (Compulsory)
5. **Company Registration Document**: Check the Checkbox if you have the company registration document of the company. (Not Compulsory)
6. **Letter of Good Standing COID**: Check the Checkbox if you have the letter of co standing of the company. (Not Compulsory)
7. **Has BEE?**: Check the Checkbox if the company has BEE. (Compulsory)
  - **BEE Level**: Fill in the company's BEE level. (Compulsory)
  - **BEE Certificate**: Provide the company's BEE certificate. (Compulsory)
  - **Date of BEE Validity**: Choose the date of the company's date of BEE validity using a date picker. (Compulsory)
8. **Directors Details and ID's**: Check the Checkbox if you have the directors' details and ID's of the company. (Not Compulsory)



9. **“Company Resolution Agreement”:** Check the Checkbox if you have the resolution agreement of the company. (Not Compulsory)

**Step three edit the “Financials” and click the “Next” button to move onto step four. (Fields that are required will state so)**

**Due Diligence Checklist?**  
Please fill in the following details:

- DUE DILIGENCE CHECKLIST DETAILS
- FOUNDATIONAL DOCUMENTS
- FINANCIALS

VAT Registration Certificate:	<input type="checkbox"/>
Tax Clearance Certificate:	<input type="checkbox"/>
Bank Stamped confirmation letter:	<input type="checkbox"/>

**Back** **Next**

Figure 1 Click Next Financials Approve Vendor Button Sole Supplier

1. **“Vat Registration Certificate”:** Check the Checkbox if you have the VAT registration certificate of the company. (Not Compulsory)
2. **“TAX Clearance Certificate”:** Check the Checkbox if you have the TAX clearance certificate of the company. (Not Compulsory)
3. **“Bank Stamped Confirmation Letter”:** Check the checkbox if you have the bank stamped confirmation letter of the company. (Not Compulsory)

**Step four edit the “Sub-Contraction” and click the “Next” button to move onto step five. (Fields that are required will state so)**

**Due Diligence Checklist?**  
Please fill in the following details:

- DUE DILIGENCE CHECKLIST DETAILS
- FOUNDATIONAL DOCUMENTS
- FINANCIALS
- SUB-CONTRACTING

Name of sub-contractor:	<input type="checkbox"/>
Provide similar documents as for main supplier (in case of company):	<input type="checkbox"/>
Provide copy of ID, qualifications, accreditations and professional memberships (in case of individual):	<input type="checkbox"/>

**Back** **Next**

Figure 1 Click Next Sub-Contracting Approve Vendor Button Sole Supplier



1. **Name of Sub-Contractor**: Check the Checkbox if you have the name of the sub-contractor of the company. (Not Compulsory)
2. **Provide similar documents as for main supplier (In case of company)**: Check the Checkbox if you have the similar documents of main supplier of the company. (Not Compulsory)
3. **Provide copy of ID, qualifications, accreditations and professional memberships (In case of individual)**: Check the checkbox if you have the copy of ID's, qualifications, accreditations, and professional memberships of the individual. (Not Compulsory)

**Step Five edit the “Insurance” and click the “Next” button to move onto step six. (Fields that are required will state so)**

**Due Diligence Checklist?**  
Please fill in the following details:

- DUE DILIGENCE CHECKLIST DETAILS
- FOUNDATIONAL DOCUMENTS
- FINANCIALS
- SUB-CONTRACTING
- INSURANCE

General liability insurance:

Add new General liability Insurance Document?  No file chosen

Cyber insurance:

Add a new Cyber Insurance Document?  No file chosen

Professional indemnity insurance (if applicable):

Add a new Professional Indemnity Insurance Document?  No file chosen

Other specific insurance required per service/industry:

Add new Other specific insurance Document?  No file chosen

[Back](#) Next

Figure 1 Click Next Insurance Approve Vendor Sole Supplier

1. **General Liability Insurance**: Check the Checkbox if you have the general liability insurance of the company. (Not Compulsory)
  - **Add new General liability Insurance Document?**: Provide the general liability insurance document of the company. (Compulsory)
2. **Cyber insurance**: Check the Checkbox if you have the Cyber Insurance of the company. (Not Compulsory)



- "Add a new Cyber Insurance Document?": Provide the cyber insurance document of the company. (Compulsory)
3. "Professional indemnity insurance (if applicable):": Check the checkbox if you have the professional indemnity insurance of the company. (Not Compulsory)
- "Add a new Professional Indemnity Insurance Document?": Provide the professional indemnity insurance document of the company. (Compulsory)
4. "Other specific insurance required per service/industry": Check the checkbox if you have other specific insurance of the company. (Not Compulsory)
- "Add new Other specific insurance Document?": Provide the other specific insurance document of the company. (Compulsory)

**Step six edit the “License or Professional Accreditation” and click the “Next” button to move onto step seven. (Fields that are required will state so)**

**Due Diligence Checklist?**  
Please fill in the following details:

DUE DILIGENCE CHECKLIST DETAILS  
 FOUNDERAL DOCUMENTS  
 FINANCIALS  
 SUB-CONTRACTING  
 INSURANCE

LICENSES OR PROFESSIONAL ACCREDITATION

Licenses required:	<input type="checkbox"/>
Accreditation required:	<input type="checkbox"/>
Professional membership required:	<input type="checkbox"/>

**Back** **Next**

Figure 1 Click Next License or professional accreditation Approve Vendor Sole Supplier

1. "Licenses required:": Check the Checkbox if the license is required of the company. (Not Compulsory)
2. "Accreditation required:": Check the Checkbox if accreditation is required of the company. (Not Compulsory)
3. "Professional membership required": Check the checkbox if professional membership is required of the company. (Not Compulsory)

**Step seven edit the “Information Security” and click the “Next” button to move onto step eight. (Fields that are required will state so)**



The screenshot shows a web-based vendor approval form. On the left, there's a sidebar with three categories: 'INSURANCE' (with a blue icon), 'LICENCES OR PROFESSIONAL ACCREDITATION' (with a blue icon), and 'INFORMATION SECURITY' (with a grey icon). The main area contains several questions under the 'INFORMATION SECURITY' heading. One question, 'Protection of personal information by design', has a checked checkbox. Below it, a dropdown menu is set to 'Controller (C)'. There are several other questions with checkboxes, some of which have '(Required)' labels. At the bottom, there are 'Back' and 'Next' buttons, with 'Next' being highlighted with a red box.

Figure 1 Click Next Information Security Approve Vendor Button Sole Supplier

1. **Business continuity plan**: Check the Checkbox if you have the business community plan of the company. (Not Compulsory)
2. **Disaster recovery plan**: Check the Checkbox if you have the disasters recovery plan of the company. (Not Compulsory)
3. **Protection of personal information by design**: Check the checkbox if you have the protection of personal information by design of the company. (Not Compulsory)
  - **Does the contract set out what personal data is used for what purpose?**: Check the checkbox if the contract sets out what personal data is used of the company. (Compulsory)
  - **Is the contracted partner a controller (C), joint controller (JC), processor (P) or sub-processor (SP)?**: Choose one of the options of the company. (Compulsory)
  - **Depending on the controller/processor relationship, do you have a Data Processing Agreement or a Joint Controller Agreement in place?**: Check the checkbox if you have the data processing agreement or joint controller agreement in place with the company. (Compulsory)
  - **Does the contract highlight the importance of confidentiality?**: Check the checkbox if the contract highlights the importance of confidentiality. (Compulsory)
  - **Does the contract provide for audits and inspections?**: Check the checkbox if the contract provided audits and inspections. (Compulsory)



- “Is it clear who is accountable and liable for different activities?”: Check the checkbox if the contract is clear on who is accountable and liable for different activities. (Compulsory)
  - “Is there a provision to cover third party processing of data?”: Check the checkbox if there is a proven to cover third party processing of data efforts of the company. (Compulsory)
  - “Does a process exist for managing data when the contract ends?”: Check the checkbox if a processing does exist for managing date when the contract ends. (Compulsory)
  - “Is the personal data that's being processed detailed in your and their 'Record of Processing Activities'?”: Check the checkbox if the professional data that is being processed detailed in, you're and the company's 'Record of Processing Activities'. (Compulsory)
  - “Does the supplier hold any form of certification for their processing activities?”: Check the checkbox if the supplier holds any form of certification of their processing activities of the company. (Compulsory)
4. “History of data breaches and security incidents”: Check the checkbox if you have the History of data breaches and security incidents of the company. (Not Compulsory)
5. “Site visits to assess security controls (if required)”: Check the checkbox if you have site visits to assess security controls of the company. (Not Compulsory)

**Step eight edit the “Policy Review” and click the “Next” button to move onto step nine. (Fields that are required will state so)**

DUE DILIGENCE CHECKLIST DETAILS

FOUNDATIONAL DOCUMENTS

FINANCIALS

SUB-CONTRACTING

INSURANCE

LICENSES OR PROFESSIONAL ACCREDITATION

INFORMATION SECURITY

POLICY REVIEW

Information security or Data protection policy:

Privacy policy:

Data retention and destruction policy:

Anti-bribery and anti-corruption policy:

Ethics policy:

Conflict of interest policy:

Customer complaints policy:

**Back** **Next**



Figure 1 Click Next Policy Review Approve Vendor Button Sole Supplier

1. **Information security or Data protection policy**: Check the Checkbox if you have the Information security or Date protection policy of the company. (Not Compulsory)
2. **Privacy policy**: Check the Checkbox if you have the privacy policy of the company. (Not Compulsory)
3. **Data retention and destruction policy**: Check the checkbox if you have the data retention and destruction policy of the company. (Not Compulsory)
4. **Anti-bribery and anti-corruption policy**: Check the checkbox if you have the anti-bribery and anti-corruption policy of the company. (Not Compulsory)
5. **Ethics policy**: Check the checkbox if you have the ethics policy of the company. (Not Compulsory)
6. **Conflict of interest policy**: Check the checkbox if you have the conflict-of-interest policy of the company. (Not Compulsory)
7. **Customer complaints policy**: Check the checkbox if you have the customer complaints policy of the company. (Not Compulsory)

**Step nine edit the “Business References” and click the “Next” button to move onto step ten. (Fields that are required will state so)**

The screenshot shows the MOYO Due Diligence Checklist interface. At the top, there's a navigation bar with links for Administration, Inventory, Finance, Procurement, Vendor, Reports, Help, and user icons. Below the header, the title 'Due Diligence Checklist?' is displayed with a question mark icon. A sub-instruction 'Please fill in the following details:' is present. On the left, a vertical list of checklist items is shown with checkboxes next to each item name:

- DUE DILIGENCE CHECKLIST DETAILS (checkbox checked)
- FOUNDATIONAL DOCUMENTS (checkbox checked)
- FINANCIALS (checkbox checked)
- SUB-CONTRACTING (checkbox checked)
- INSURANCE (checkbox checked)
- LICENSES OR PROFESSIONAL ACCREDITATION (checkbox checked)
- INFORMATION SECURITY (checkbox checked)
- POLICY REVIEW (checkbox checked)
- BUSINESS REFERENCES (checkbox checked)

At the bottom of the page, there's a text input field labeled 'Details of at least two business references:' followed by a red-bordered 'Next' button. To the left of the 'Next' button is a 'Back' button.

Figure 1 Click Next Business References Approve Vendor Button Sole Supplier



1. **“Details of at least two business references”:** Check the Checkbox if you have at least two business references of the company. (Not Compulsory)

**Step ten “Done” and click the “Create” button. Once you clicked the create button the Due Diligence checklist of the vendor will be create on the system and the sole supplier will be added to the list of approve onboard requests.**

**Due Diligence Checklist?**  
Please fill in the following details:

DUE DILIGENCE CHECKLIST DETAILS  
 FOUNDATIONAL DOCUMENTS  
 FINANCIALS  
 SUB-CONTRACTING  
 INSURANCE  
 LICENCES OR PROFESSIONAL ACCREDITATION  
 INFORMATION SECURITY  
 POLICY REVIEW  
 BUSINESS REFERENCES  
 Done

\*Please ensure that all details are correct\*

[Back](#) [Create](#)

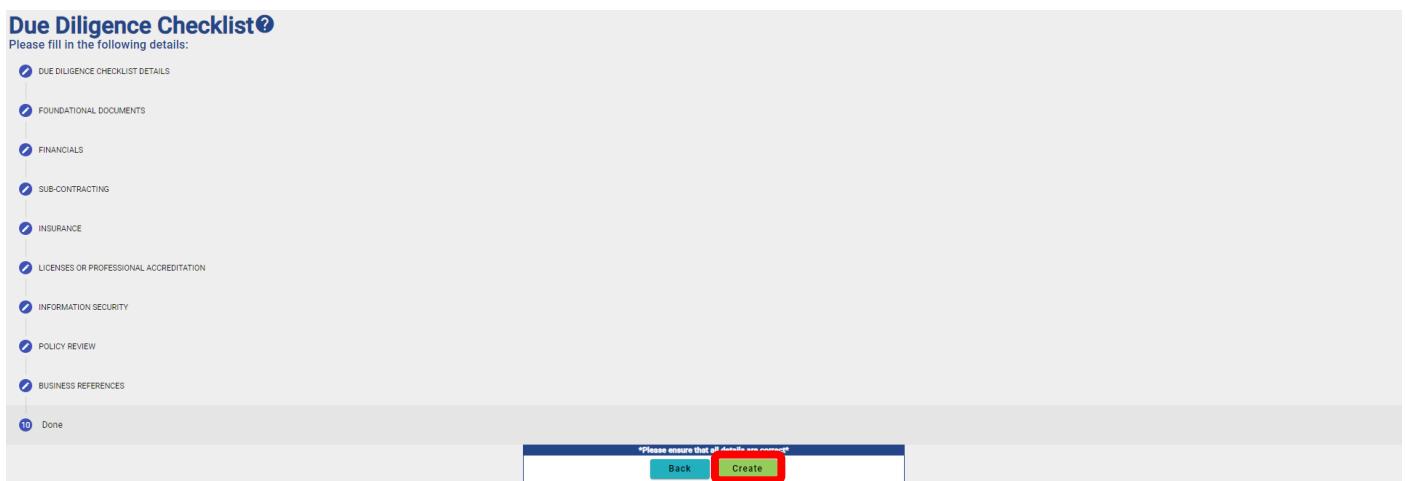


Figure 1 Click Create Done Approve Vendor Sole Supplier



## Step 6 Update Due Diligence Checklist:

**Update the Sole Supplier and General Supplier vendor Due Diligence Checklist by clicking on the “Update” button on the approve vendor table on the approve vendor screen.**

(\*Note filter by Approved Vendor to make it easier to find)

Onboard Request Number	Selected Option	Request Type	Total Quotes	Created By	Action	Action
1	srgs	Sole Supplier	1	Admin	<span style="background-color: green; border: 1px solid black; padding: 2px;">Update</span>	<span style="background-color: green; border: 1px solid black; padding: 2px;">View</span>
2	erifverg	General Suppliers	3	Admin	<span style="background-color: green; border: 1px solid black; padding: 2px;">Update</span>	<span style="background-color: green; border: 1px solid black; padding: 2px;">View</span>
3	hot hotter hottest	General Suppliers	3	Admin	<span style="background-color: green; border: 1px solid black; padding: 2px;">Update</span>	<span style="background-color: green; border: 1px solid black; padding: 2px;">View</span>
4	SoleSuppliers	Sole Supplier	1	Admin	<span style="background-color: green; border: 1px solid black; padding: 2px;">Update</span>	<span style="background-color: green; border: 1px solid black; padding: 2px;">View</span>

Figure 1 Click Update Approve Vendor Button

This will navigate you to the “Due Diligence Checklist” screen. There you will be able to update the due diligence checklist of the sole supplier and/or General Supplier on the system. This is done by following a 10-step process to complete the due diligence checklist and update it to the sole supplier on the system. Step one you will complete the “Due Diligence Checklist Details” and click the “Next” button to move onto step two.

**Due Diligence Checklist** ?  
Please fill in the following details:

1 DUE DILIGENCE CHECKLIST DETAILS

Do you have a physical copy of the Due Diligence Checklist?

Next Cancel

Figure 1 Click Next Due Diligence Checklist Details Update Approve Vendor Button

**1 “Do you have a physical copy of the due diligence checklist?”:** Check the Checkbox if you have a physical copy of the due diligence checklist of the company. (Not Compulsory)

**Step two edit the “Foundational Documents” and click the “Next” button to move onto step three. (Fields that are required will state so)**



### Due Diligence Checklist?

Please fill in the following details:

- DUE DILIGENCE CHECKLIST DETAILS
- FOUNDATIONAL DOCUMENTS

Mutual Non-Disclosure Agreement or Confidentiality Agreement:	<input type="checkbox"/>
Basic Company Information: <span style="color: red;">(Required)</span>	<input type="checkbox"/>
Ownership structure and affiliated entities:	<input type="checkbox"/>
Income tax number: <span style="color: red;">(Required)</span>	<input type="checkbox"/>
VAT number:	<input type="checkbox"/>
Company registration document:	<input type="checkbox"/>
Letters of good standing COID:	<input type="checkbox"/>
Has BEE:	<input checked="" type="checkbox"/>
BEE level:	<input type="text" value="1"/>
BEE Certificate:	<input type="file" value="Choose File No file chosen"/>
Date of BEE validity:	<input type="text" value="Choose a date* MM/DD/YYYY"/>
Directors details and ID's:	<input type="checkbox"/>
Company Resolution Agreement:	<input type="checkbox"/>

[Back](#) [Next](#)

Figure 1 Click Next Foundational Documents Update Approve Vendor Button

1. **Mutual Non-Disclosure Agreement or Confidentiality Agreement**: Check the Checkbox if there is a mutual non-disclosure agreement or confidentiality agreement of the company. (Not Compulsory)
2. **Basic Company Information**: Check the Checkbox if you have the basic company information of the company. (Compulsory)
3. **Ownership Structure and Affiliated Entities**: Check the checkbox if you have the ownership structure and affiliated entities details. (Not Compulsory)
4. **Income tax Number**: Check the Checkbox if you have the income tax number of the company. (Compulsory)
5. **Company Registration Document**: Check the Checkbox if you have the company registration document of the company. (Not Compulsory)
6. **Letter of Good Standing COID**: Check the Checkbox if you have the letter of co standing of the company. (Not Compulsory)
7. **Has BEE?**: Check the Checkbox if the company has BEE. (Compulsory)
  - **BEE Level**: Fill in the company's BEE level. (Compulsory)
  - **BEE Certificate**: Provide the company's BEE certificate. (Compulsory)
  - **Date of BEE Validity**: Choose the date of the company's date of BEE validity using a date picker. (Compulsory)
8. **Directors Details and ID's**: Check the Checkbox if you have the directors' details and ID's of the company. (Not Compulsory)



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9. **“Company Resolution Agreement”:** Check the Checkbox if you have the resolution agreement of the company. (Not Compulsory)

**Step three edit the “Financials” and click the “Next” button to move onto step four. (Fields that are required will state so)**

The screenshot shows a 'Due Diligence Checklist' interface. On the left, there's a sidebar with tabs: 'DUE DILIGENCE CHECKLIST DETAILS' (selected), 'FOUNDATIONAL DOCUMENTS', 'FINANCIALS' (highlighted with a blue background), and 'SUB-CONTRACTING'. The main area has sections for 'VAT Registration Certificate', 'Tax Clearance Certificate', and 'Bank Stamped confirmation letter', each with a checkbox. At the bottom are 'Back' and 'Next' buttons, with 'Next' being highlighted by a red box.

Figure 1 Click Next Financials Update Approve Vendor Button

- “Vat Registration Certificate”:** Check the Checkbox if you have the VAT registration certificate of the company. (Not Compulsory)
- “TAX Clearance Certificate”:** Check the Checkbox if you have the TAX clearance certificate of the company. (Not Compulsory)
- “Bank Stamped Confirmation Letter”:** Check the checkbox if you have the bank stamped confirmation letter of the company. (Not Compulsory)

**Step four edit the “Sub-Contruction” and click the “Next” button to move onto step five. (Fields that are required will state so)**

The screenshot shows the same 'Due Diligence Checklist' interface as Figure 1, but with the 'SUB-CONTRACTING' tab selected in the sidebar. It includes sections for 'Name of sub-contractor', 'Provide similar documents as for main supplier (in case of company)', and 'Provide copy of ID, qualifications, accreditations and professional memberships (in case of individual)', each with a checkbox. The 'Back' and 'Next' buttons are at the bottom, with 'Next' being highlighted by a red box.

Figure 1 Click Next Sub-Contracting Update Approve Vendor Button



1. **Name of Sub-Contractor**: Check the Checkbox if you have the name of the sub-contractor of the company. (Not Compulsory)
2. **Provide similar documents as for main supplier (In case of company)**: Check the Checkbox if you have the similar documents of main supplier of the company. (Not Compulsory)
3. **Provide copy of ID, qualifications, accreditations and professional memberships (In case of individual)**: Check the checkbox if you have the copy of ID's, qualifications, accreditations, and professional memberships of the individual. (Not Compulsory)

**Step Five edit the “Insurance” and click the “Next” button to move onto step six. (Fields that are required will state so)**

**Due Diligence Checklist?**  
Please fill in the following details:

- DUE DILIGENCE CHECKLIST DETAILS
- FOUNDATIONAL DOCUMENTS
- FINANCIALS
- SUB-CONTRACTING
- INSURANCE

General liability insurance:

Add new General liability Insurance Document?  No file chosen

Cyber insurance:

Add a new Cyber Insurance Document?  No file chosen

Professional indemnity insurance (if applicable):

Add a new Professional Indemnity Insurance Document?  No file chosen

Other specific insurance required per service/industry:

Add new Other specific insurance Document?  No file chosen

[Back](#) Next

Figure 1 Click Next Insurance Update Approve Vendor Button

1. **General Liability Insurance**: Check the Checkbox if you have the general liability insurance of the company. (Not Compulsory)
  - **Add new General liability Insurance Document?**: Provide the general liability insurance document of the company. (Compulsory)
2. **Cyber insurance**: Check the Checkbox if you have the Cyber Insurance of the company. (Not Compulsory)



- "Add a new Cyber Insurance Document?": Provide the cyber insurance document of the company. (Compulsory)
3. "Professional indemnity insurance (if applicable):": Check the checkbox if you have the professional indemnity insurance of the company. (Not Compulsory)
- "Add a new Professional Indemnity Insurance Document?": Provide the professional indemnity insurance document of the company. (Compulsory)
4. "Other specific insurance required per service/industry": Check the checkbox if you have other specific insurance of the company. (Not Compulsory)
- "Add new Other specific insurance Document?": Provide the other specific insurance document of the company. (Compulsory)

**Step six edit the “License or Professional Accreditation” and click the “Next” button to move onto step seven. (Fields that are required will state so)**

**Due Diligence Checklist?**  
Please fill in the following details:

DUE DILIGENCE CHECKLIST DETAILS  
 FOUNDERAL DOCUMENTS  
 FINANCIALS  
 SUB-CONTRACTING  
 INSURANCE

LICENSES OR PROFESSIONAL ACCREDITATION

Licenses required:	<input type="checkbox"/>
Accreditation required:	<input type="checkbox"/>
Professional membership required:	<input type="checkbox"/>

**Back** **Next**

Figure 1 Click Next License or professional accreditation Update Approve Vendor Button

1. "Licenses required:": Check the Checkbox if the license is required of the company. (Not Compulsory)
2. "Accreditation required:": Check the Checkbox if accreditation is required of the company. (Not Compulsory)
3. "Professional membership required": Check the checkbox if professional membership is required of the company. (Not Compulsory)

**Step seven edit the “Information Security” and click the “Next” button to move onto step eight. (Fields that are required will state so)**



The screenshot shows a web-based vendor assessment tool. On the left, there's a sidebar with three categories: 'INSURANCE' (with a blue icon), 'LICENCES OR PROFESSIONAL ACCREDITATION' (with a blue icon), and 'INFORMATION SECURITY' (with a grey icon). The main area is titled 'Information Security' and contains several questions with checkboxes. One question, 'Protection of personal information by design', has a checked checkbox. Below it, a dropdown menu is set to 'Controller (C)'. There are also other questions about contracts, audits, and data processing. At the bottom right of the form area, there are 'Back' and 'Next' buttons, with the 'Next' button being highlighted with a red box.

Figure 1 Click Next Information Security Update Approve Vendor Button

- Business continuity plan**: Check the Checkbox if you have the business community plan of the company. (Not Compulsory)
- Disaster recovery plan**: Check the Checkbox if you have the disasters recovery plan of the company. (Not Compulsory)
- Protection of personal information by design**: Check the checkbox if you have the protection of personal information by design of the company. (Not Compulsory)
  - Does the contract set out what personal data is used for what purpose?**: Check the checkbox if the contract sets out what personal data is used of the company. (Compulsory)
  - Is the contracted partner a controller (C), joint controller (JC), processor (P) or sub-processor (SP)?**: Choose one of the options of the company. (Compulsory)
  - Depending on the controller/processor relationship, do you have a Data Processing Agreement or a Joint Controller Agreement in place?**: Check the checkbox if you have the data processing agreement or joint controller agreement in place with the company. (Compulsory)
  - Does the contract highlight the importance of confidentiality?**: Check the checkbox if the contract highlights the importance of confidentiality. (Compulsory)
  - Does the contract provide for audits and inspections?**: Check the checkbox if the contract provided audits and inspections. (Compulsory)



- **“Is it clear who is accountable and liable for different activities?”:** Check the checkbox if the contract is clear on who is accountable and liable for different activities. (Compulsory)
  - **“Is there a provision to cover third party processing of data?”:** Check the checkbox if there is a proven to cover third party processing of data efforts of the company. (Compulsory)
  - **“Does a process exist for managing data when the contract ends?”:** Check the checkbox if a processing does exist for managing date when the contract ends. (Compulsory)
  - **“Is the personal data that's being processed detailed in your and their 'Record of Processing Activities'?”:** Check the checkbox if the professional data that is being processed detailed in, you're and the company's 'Record of Processing Activities'. (Compulsory)
  - **“Does the supplier hold any form of certification for their processing activities?”:** Check the checkbox if the supplier holds any form of certification of their processing activities of the company. (Compulsory)
4. **“History of data breaches and security incidents”:** Check the checkbox if you have the History of data breaches and security incidents of the company. (Not Compulsory)
5. **“Site visits to assess security controls (if required)”:** Check the checkbox if you have site visits to assess security controls of the company. (Not Compulsory)

**Step eight edit the “Policy Review” and click the “Next” button to move onto step nine. (Fields that are required will state so)**

DUE DILIGENCE CHECKLIST DETAILS

FOUNDATIONAL DOCUMENTS

FINANCIALS

SUB-CONTRACTING

INSURANCE

LICENSES OR PROFESSIONAL ACCREDITATION

INFORMATION SECURITY

POLICY REVIEW

Information security or Data protection policy:

Privacy policy:

Data retention and destruction policy:

Anti-bribery and anti-corruption policy:

Ethics policy:

Conflict of interest policy:

Customer complaints policy:

**Back** **Next**



Figure 1 Click Next Policy Review Update Approve Vendor Button

1. **Information security or Data protection policy**: Check the Checkbox if you have the Information security or Date protection policy of the company. (Not Compulsory)
2. **Privacy policy**: Check the Checkbox if you have the privacy policy of the company. (Not Compulsory)
3. **Data retention and destruction policy**: Check the checkbox if you have the data retention and destruction policy of the company. (Not Compulsory)
4. **Anti-bribery and anti-corruption policy**: Check the checkbox if you have the anti-bribery and anti-corruption policy of the company. (Not Compulsory)
5. **Ethics policy**: Check the checkbox if you have the ethics policy of the company. (Not Compulsory)
6. **Conflict of interest policy**: Check the checkbox if you have the conflict-of-interest policy of the company. (Not Compulsory)
7. **Customer complaints policy**: Check the checkbox if you have the customer complaints policy of the company. (Not Compulsory)

**Step nine edit the “Business References” and click the “Next” button to move onto step ten. (Fields that are required will state so)**

The screenshot shows the MOYO Due Diligence Checklist interface. At the top, there's a navigation bar with links for Administration, Inventory, Finance, Procurement, Vendor, Reports, Help, and user icons. Below the navigation, the title "Due Diligence Checklist" is displayed with a question mark icon. A note says "Please fill in the following details:". On the left, there's a vertical list of categories with checkboxes: DUE DILIGENCE CHECKLIST DETAILS, FOUNDATIONAL DOCUMENTS, FINANCIALS, SUB-CONTRACTING, INSURANCE, LICENSES OR PROFESSIONAL ACCREDITATION, INFORMATION SECURITY, POLICY REVIEW, and BUSINESS REFERENCES. The "BUSINESS REFERENCES" category has a sub-note "Details of at least two business references:" followed by a text input field and a red-bordered "Next" button. Other buttons visible include "Back" and a small "Cancel" button.

Figure 1 Click Next Business References Update Approve Vendor Button



1. **“Details of at least two business references”:** Check the Checkbox if you have at least two business references of the company. (Not Compulsory)

Step ten “Done” and click the “update” button. Once you clicked the update button the Due Diligence checklist of the vendor will be updated on the system.

**Due Diligence Checklist?**  
Please fill in the following details:

- DUE DILIGENCE CHECKLIST DETAILS
- FOUNDATIONAL DOCUMENTS
- FINANCIALS
- SUB-CONTRACTING
- INSURANCE
- LICENSES OR PROFESSIONAL ACCREDITATION
- INFORMATION SECURITY
- POLICY REVIEW
- BUSINESS REFERENCES

10 Done

\*Please ensure that all fields are filled correctly before clicking the 'Create' button.

Back Create

Figure 1 Click Create Done Update Approve Vendor Button

## Step 7 View Approve Vendor:

View the Sole Supplier and General Supplier vendor by clicking on the “View” button on the approve vendor table on the approve vendor screen. (\*Note filter by Approved Vendor to make it easier to find)

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Administration Inventory Finance Procurement Vendor Reports Help

Onboard Request Number	Selected Option	Request Type	Total Quotes	Created By	Action
1	srgs	Sole Supplier	1	Admin	<button>Update</button> <button>View</button>
2	erfverg	General Suppliers	3	Admin	<button>Update</button> <button>View</button>
3	hot hotter hottest	General Suppliers	3	Admin	<button>Update</button> <button>View</button>
4	SoleSuppliers	Sole Supplier	1	Admin	<button>Update</button> <button>View</button>

Filter by: Approved Vendor

Search

Items per page: 5 1 - 4 of 4

Figure 1 Click View Approve Vendor Button

This will navigate you to the “Onboard Request” screen. There you will be able to view the vendor details of the sole supplier and/or General Supplier on the system.



## ← Onboard Request #3 ?

Company Name:	hot hotter hottest
Company Email:	HotSause@gmail.com
Company Quote:	<a href="#">Budget Variance Report (1).pdf</a>
Export Due Diligence:	<a href="#">Generate Checklist</a>

Figure 1 view Approved Vendor Details



## Manage Vendor:

Create Vendor, Edit Vendor, Delete Vendor, and Update BEE Details:

### Step 1 Navigate to Manage Vendor screen:

Navigate to the Manage Vendor Screen by clicking on the “Vendor” button on the top navbar or on the “Vendor” button on the home screen:

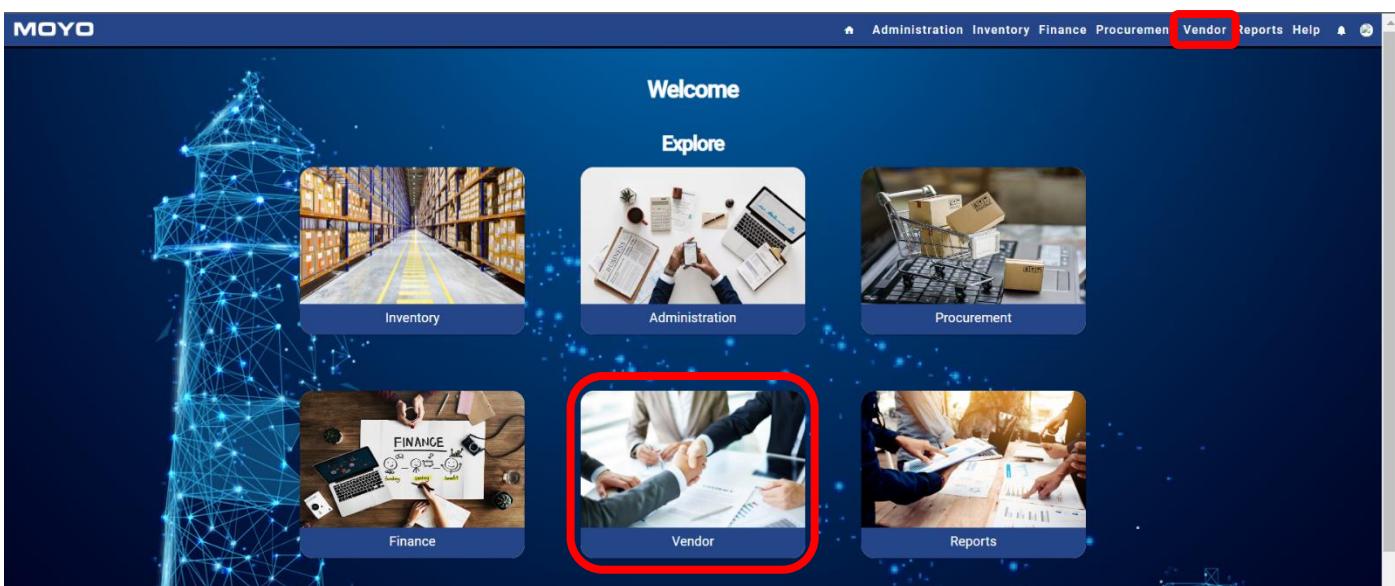


Figure 1 Home Screen to Manage Vendor Screen

Then Click on the “Manage Vendor” button on the Vendor side navbar:

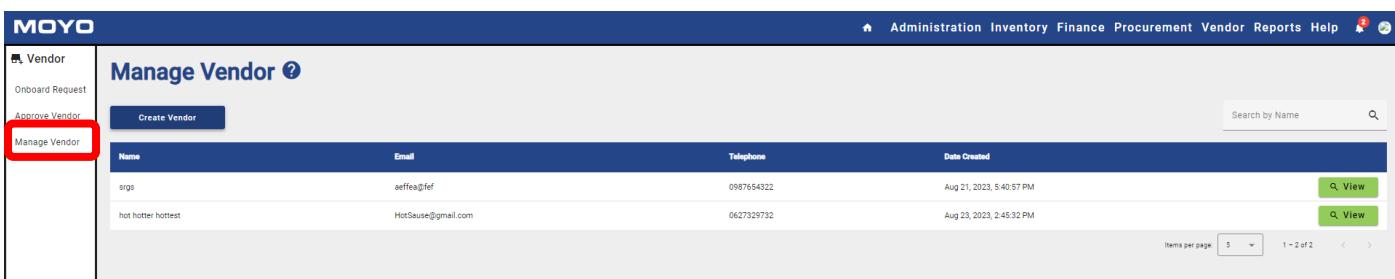


Figure 1 Vendor side nav to Manage Vendor Screen

## Step 2 Create Vendor:

Create a new Vendor by clicking on the “Create Vendor” button on the Manage Vendor screen:

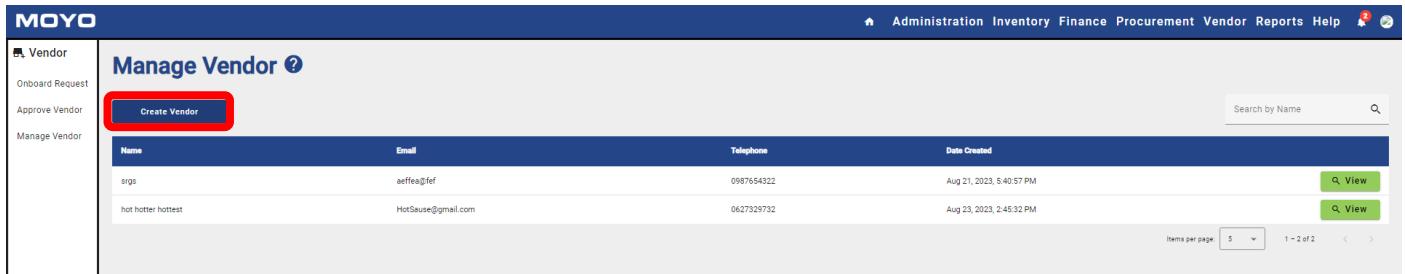


Figure 1 Click Create Vendor Button

This will navigate you to the “Create Vendor” screen where you will be able to choose the approved vendor that you want to add as a new vendor on the system. Click The “Confirm” button to navigate to the create vendor details screen.

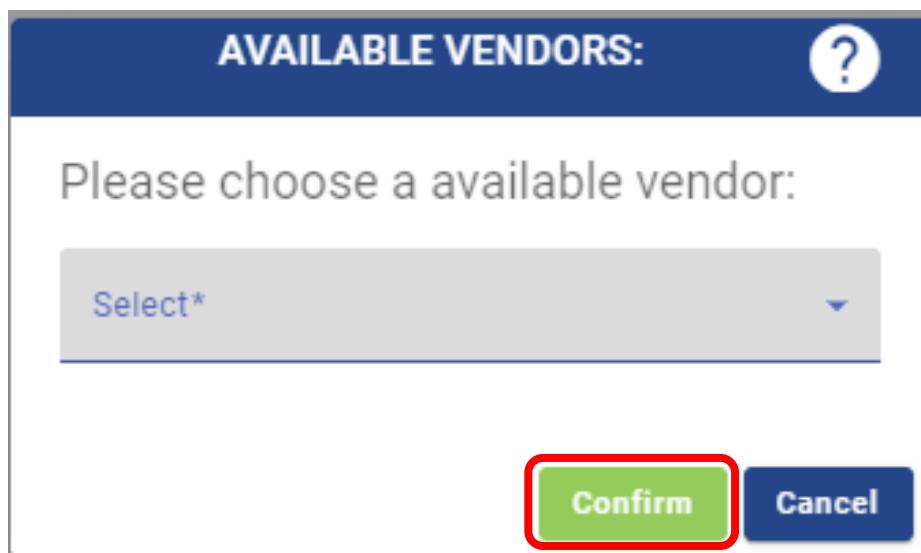


Figure 1 Click Confirm Create Vendor Button

2. “Select Vendor”: Choose the name of the approved vendors you want to create. (Compulsory)

This will navigate you to the “Create Vendor Details” screen. There you will follow a 4-step process adding the necessary details to be able to create a new vendor. Step one Provide the “Company Contact Information” and click the “Next” button to move onto step two.



(\*Note only the fillable field are required while unchecked checkboxes are not required but if checked opens up more fields that are required until the checkbox is unchecked again)

The screenshot shows a step-by-step form titled 'Create Vendor'. The first step, 'COMPANY CONTACT INFORMATION', contains the following fields:

- Company Name: ervergy
- Company Email: avfarwrf@efwrfrf
- Company Telephone: Company Telephone
- Company Registered Address: (text area)
- Company Website: (checkbox checked) Add Company Website? Company Website
- Company Fax: (checkbox checked) Add Company Fax? Company Fax
- Contact Person Title: Contact Person Title
- Contact Person Name: Contact Person Name
- Contact Person Phone: Contact Person Phone
- Contact Person Email: Contact Person Email

At the bottom right of the form, there are two buttons: 'Cancel' and 'Next'. The 'Next' button is highlighted with a red box.

Figure 1 Create Vendor Company Contact Information Step 1 Click Next button.

- “Company Name”**: Prefilled with the vendor company name you chose to create.
- “Company Email”**: Prefilled with the vendor company email you chose to create.
- “Company Telephone”**: Fill in the telephone number of the vendor company. (Compulsory)
- “Company Register Address”**: Fill in the registered address of the vendor company. (Compulsory)
- “Company Website”**: Check the checkbox if the company has a website. (Not Compulsory)
  - “Company Website”**: Fill in the company website of the vendor company. (Compulsory)
- “Company Fax”**: Check the checkbox if the company has Fax. (Not Compulsory)
  - “Company Fax”**: Fill in the company Fax of the vendor company. (Compulsory)
- “Contact Person Title”**: Fill in the contact persons title of the vendor company. (Compulsory)
- “Contact Person Name”**: Fill in the contact person's name of the vendor company. (Compulsory)
- “Contact Person Phone”**: Fill in the contact person's phone number of the vendor company. (Compulsory)



**10. “Contact Person Email”:** Fill in the contact person’s email of the vendor company.  
(Compulsory)

**Step two Provide the “Company Overview” and click the “Next” button to move onto step three. (\*Note only the fillable field are required while unchecked checkboxes are not required but if check opens up more fields that are required until the checkbox is unchecked again)**

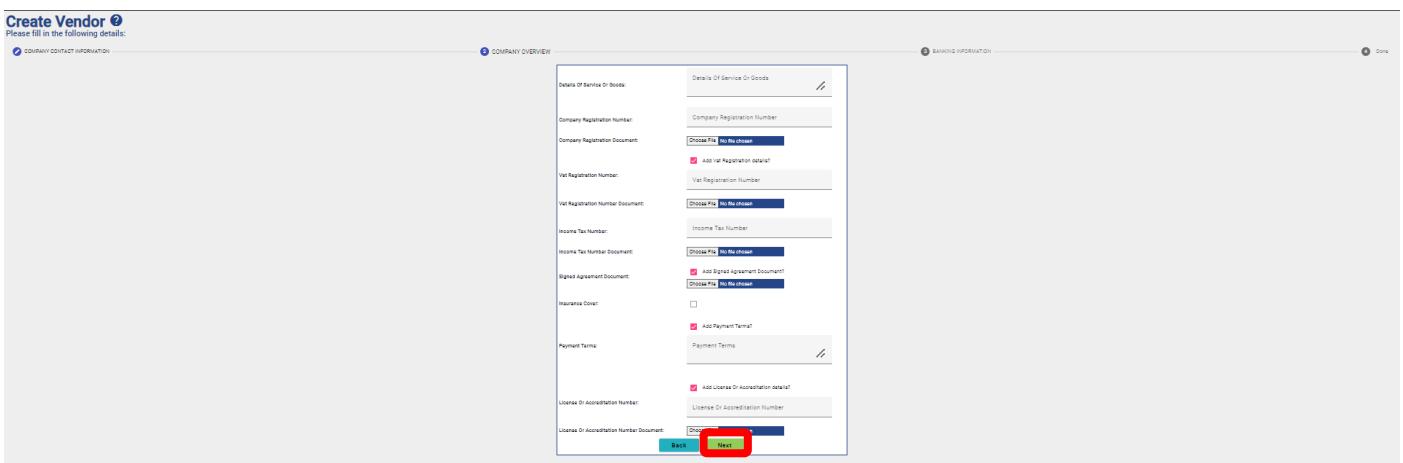


Figure 1 Create Vendor Company Overview Step 2 Click Next button.

- 1. “Details of Service of Goods”:** Fill in the details of service of goods of the vendor company.  
(Compulsory)
- 2. “Company Registration Number”:** Fill in the registration number of the vendor company.  
(Compulsory)
- 3. “Add Vat Registration details”:** Check the checkbox if the company has vat registration details.  
(Not Compulsory)
  - **“Vat Registration Number”:** Fill in the vat registration number of the vendor company.  
(Compulsory)
  - **“Vat Registration Document”:** Provide the vat registration document of the vendor company. (Compulsory)
- 4. “Income tax Number”:** Fill in the income tax number of the vendor company. (Compulsory)
- 5. “Income Tax Number Document”:** Provide the income tax document of the vendor company. (Compulsory)



6. **Signed Agreement Document**: Check the checkbox if the company has signed agreement document. (Not Compulsory)
  - **Signed Agreement Document**: Provide the signed agreement document of the vendor company. (Compulsory)
7. **Insurance Cover**: Check the checkbox if the company has insurance cover. (Not Compulsory)
8. **Payment Terms**: Check the checkbox if the company has payment terms. (Not Compulsory)
  - **Payment Terms**: Fill in the payment terms of the vendor company. (Compulsory)
9. **License of Accreditation Number**: Check the checkbox if the company has license of accreditation number. (Not Compulsory)
  - **License of Accreditation Number**: Fill in the license of accreditation number of the vendor company. (Compulsory)
  - **License of Accreditation Number Document**: Provide the license of accreditation number document of the vendor company. (Compulsory)

**Step three Provide the “Banking Information” and click the “Next” button to move onto step four.**

The screenshot shows a web-based form titled 'Create Vendor'. At the top, it says 'Please fill in the following details:'. There are three tabs: 'COMPANY CONTACT INFORMATION' (selected), 'COMPANY OVERVIEW', 'BANKING INFORMATION', and 'Done'. The 'BANKING INFORMATION' tab is active. It contains fields for Bank Name, Branch Code, Account Holder, Account Type, Account Number, Bank Contact Name, Bank Contact Phone Number, and Bank Stamped Confirmation Letter (with a file upload field). At the bottom right of this section, there are 'Back' and 'Next' buttons, with 'Next' being highlighted by a red box.

Figure 1 Create Vendor Banking Information Step 3 Click Next button.

1. **Bank Name**: Fill in the bank name of the vendor company. (Compulsory)
2. **Bank Code**: Fill in the bank code of the vendor company. (Compulsory)
3. **Account Holder**: Fill in the account holder name of the vendor company. (Compulsory)
4. **Account Type**: Fill in the account type of the vendor company. (Compulsory)



5. **“Account Number”:** Fill in the account number of the vendor company. (Compulsory)
6. **“Bank Contact Name”:** Fill in the bank contact name of the vendor company. (Compulsory)
7. **“Bank Contant Phone Number”:** Fill in the bank contact phone number of the vendor company. (Compulsory)
8. **“Bank Stamped Confirmation Letter”:** Provide the bank stamped confirmation letter of the vendor company. (Compulsory)

Step four “Done” is where you are finished with process and all that is left to do is click the “Create” button. Once you clicked the create button a new vendor will be added to the system.

Figure 1 Create Vendor Done Step 4 Click Next button.

### Step 3 Edit Vendor:

Edit a Vendor by clicking on the “View” button on the Manage Vendor screen within the Manage Vendor table: (The row you chose is the Vendor you will be editing)

Name	Email	Telephone	Date Created	
srgs	asffea@fef	0987654322	Aug 21, 2023, 5:40:57 PM	
hot hotter hottest	HotSeuze@gmail.com	0627329732	Aug 23, 2023, 2:45:32 PM	

Figure 1 Click View Edit Vendor Button.

This will navigate you to the “Vendor Details” screen where you will be able to view the Vendor Details. Click on the “Update” button to edit the Vendor. (All Details are prefilled) (\*Note that the 4-step sections tabs are also show on this screen with an added BEE & Due Diligence tab)



## Vendor Details ?

Company Contact Info	Company Overview	Bank Details	BEE & Due Diligence
Company Name:	hot hotter hottest		
Company Email:	HotSause@gmail.com		
Company Telephone:	0627329732		
Company Fax:	No fax provided		
Company Website:	No website URL provided		
Company Registered Address:	Example Address		
Contact Person Title:	Mr		
Contact Person Name:	Example Name		
Contact Person Phone:	0263234424		
Contact Person Email:	ExampleApproved@gmail.com		
<b>Update</b>	<b>Delete</b>		

Figure 1 Click Update Edit Vendor Details Button

This will navigate you to the “Update Vendor” screen. There you will follow a 4-step process editing the necessary details to be able to edit the vendor. Step one edit the “Company Contact Information” and click the “Next” button to move onto step two. (All fields are prefilled)(\*Note only the fillable field are required while unchecked checkboxes are not required but if check opens up more fields that are required until the checkbox is unchecked again)



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The screenshot shows a web-based form titled 'Update Vendor'. At the top, it says 'Please fill in the following details:' followed by four tabs: '1 COMPANY CONTACT INFORMATION', '2 COMPANY OVERVIEW', '3 BANKING INFORMATION', and '4 Done'. The '1 COMPANY CONTACT INFORMATION' tab is active. The form contains the following fields:

- Company Name: hot hotter hottest
- Company Email: HotSause@gmail.com
- Company Telephone: 0627329732
- Company Registered Address: Example Address
- Company Website:  Company Website
- Company Fax:  Company Fax
- Contact Person Title: Mr
- Contact Person Name: Example Name
- Contact Person Phone: 0217384826
- Contact Person Email: ExampleApproved@gmail.com

At the bottom right of the form, there are two buttons: 'Cancel' and 'Next', with 'Next' being highlighted with a red box.

Figure 1 Edit Vendor Company Contact Information Step 1 Click Next button.

1. **“Company Name”**: Prefilled with the vendor company name you chose to edit.
2. **“Company Email”**: Prefilled with the vendor company email you chose to edit.
3. **“Company Telephone”**: Change the telephone number of the vendor company. (Not Compulsory)
4. **“Company Register Address”**: Change the registered address of the vendor company. (Not Compulsory)
5. **“Company Website”**: Check the checkbox if the company has a website. (Not Compulsory)
  - **“Company Website”**: Change the company website of the vendor company. (Not Compulsory)
6. **“Company Fax”**: Check the checkbox if the company has Fax. (Not Compulsory)
  - **“Company Fax”**: Change the company Fax of the vendor company. (Not Compulsory)
7. **“Contact Person Title”**: Change the contact persons title of the vendor company. (Not Compulsory)
8. **“Contact Person Name”**: Change the contact person's name of the vendor company. (Not Compulsory)
9. **“Contact Person Phone”**: Change in the contact person's phone number of the vendor company. (Not Compulsory)
10. **“Contact Person Email”**: Change the contact person's email of the vendor company. (Not Compulsory)



Step two edit the “Company Overview” and click the “Next” button to move onto step three. (All fields are prefilled)(\*Note only the fillable field are required while unchecked checkboxes are not required but if check opens up more fields that are required until the checkbox is unchecked again)

The screenshot shows a web-based application for creating a vendor. At the top left is a green bar with the Moyo logo. The main title is 'Create Vendor' with a help icon. Below it says 'Please fill in the following details:'. There are three tabs: 'COMPANY CONTACT INFORMATION' (selected), 'COMPANY OVERVIEW' (highlighted with a blue border), and 'BANKING INFORMATION'. The 'COMPANY OVERVIEW' tab contains several sections with input fields and checkboxes:

- Details Of Service Or Goods:** Fields include Company Registration Number, Company Registration Document (with a 'Choose File' button and 'No file chosen' message), Add or Registration serial? (checkbox checked), Vat Registration Number, Vat Registration Number Document (with a 'Choose File' button and 'No file chosen' message), Income Tax Number, Income Tax Number Document (with a 'Choose File' button and 'No file chosen' message), Add Signed Agreement Document? (checkbox checked), Choose File (button), and Add Payment Term? (checkbox checked).
- Payment Terms:** Fields include Add Payment Term? (checkbox checked) and Payment Terms.
- Licenses Or Accreditation Number:** Fields include Add License Or Accreditation Serial? (checkbox checked), License Or Accreditation Number, and License Or Accreditation Number Document (with a 'Choose File' button and 'No file chosen' message).

At the bottom right of the main form area, there are 'Back' and 'Next' buttons. The 'Next' button is highlighted with a red box.

Figure 1 Edit Vendor Company Overview Step 2 Click Next button.

1. **“Details of Service of Goods”:** Change the details of service of goods of the vendor company. (Not Compulsory)
2. **“Company Registration Number”:** Change the registration number of the vendor company. (Not Compulsory)
3. **“Add Vat Registration details”:** Check the checkbox if the company has vat registration details. (Not Compulsory)
  - **“Vat Registration Number”:** Change the vat registration number of the vendor company. (Not Compulsory)
  - **“Vat Registration Document”:** Change the vat registration document of the vendor company. (Not Compulsory)
4. **“Income tax Number”:** Change the income tax number of the vendor company. (Not Compulsory)
5. **“Income Tax Number Document”:** Change the income tax document of the vendor company. (Not Compulsory)

Step three edit the “Banking Information” and click the “Next” button to move onto step four.



Figure 1 Edit Vendor Banking Information Step 3 Click Next button.

1. **“Bank Name”:** Change the bank name of the vendor company. (Not Compulsory)
2. **“Bank Code”:** Change the bank code of the vendor company. (Not Compulsory)
3. **“Account Holder”:** Change the account holder name of the vendor company. (Not Compulsory)
4. **“Account Type”:** Change the account type of the vendor company. (Not Compulsory)
5. **“Account Number”:** Change the account number of the vendor company. (Not Compulsory)
6. **“Bank Contact Name”:** Change the bank contact name of the vendor company. (Not Compulsory)
7. **“Bank Contant Phone Number”:** Change the bank contact phone number of the vendor company. (Not Compulsory)
8. **“Bank Stamped Confirmation Letter”:** Change the bank stamped confirmation letter of the vendor company. (Not Compulsory)

**Step four “Done” is where you are finished with process and all that is left to do is click the “Update” button. Once you clicked the update button the vendor will be updated on the system.**

Figure 1 Edit Vendor Done Step 4 Click Next button.

## Step 4 Delete Vendor:

Delete a Vendor by clicking on the “View” button on the Manage Vendor screen within the Manage Vendor table: (The row you chose is the Vendor you will be Deleting)

The screenshot shows the MOYO software interface. On the left, there's a sidebar with options: Vendor (selected), Onboard Request, Approve Vendor, and Manage Vendor. The main area is titled "Manage Vendor" with a "Create Vendor" button. Below is a table with columns: Name, Email, Telephone, and Date Created. Two rows are visible: one for "srgs" and another for "hot hotter hottest". To the right of each row is a "View" button. The second "View" button is highlighted with a red box.

Figure 1 Click View Delete Vendor Button.

This will navigate you to the “Vendor Details” screen where you will be able to view the Vendor Details. Click on the “Delete” button to delete the Vendor.

The screenshot shows the "Vendor Details" screen. At the top, there's a back arrow and the title "Vendor Details". Below is a table with tabs: Company Contact Info, Company Overview, Bank Details, and BEE & Due Diligence. The "Company Contact Info" tab is active. It contains fields for Company Name (hot hotter hottest), Company Email (HotSause@gmail.com), Company Telephone (0627329732), Company Fax (No fax provided), Company Website (No website URL provided), Company Registered Address (Example Address), Contact Person Title (Mr), Contact Person Name (Example Name), Contact Person Phone (0263234424), and Contact Person Email (ExampleApproved@gmail.com). At the bottom are two buttons: "Update" and "Delete", with "Delete" being highlighted with a red box.

Figure 1 Click Delete Vendor Details Button



This will navigate you to the “Delete Vendor” screen. There you will be able to delete the vendor. Click on the “Yes” button to delete the vendor.

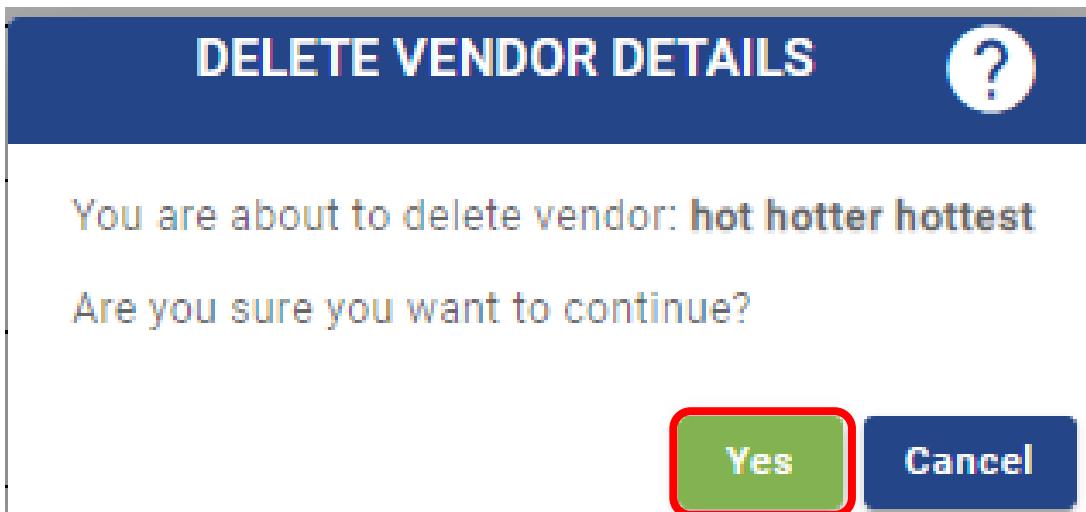


Figure 1 Click Yes Delete Vendor Button.

## Step 5 Add Vendor BEE Details:

Add BEE Details to a Vendor by clicking on the “View” button on the Manage Vendor screen within the Manage Vendor table: (The row you chose is the Vendor you will be adding BEE Details to)

MOYO						Administration	Inventory	Finance	Procurement	Vendor	Reports	Help	Logout
Vendor		Manage Vendor				Search by Name							
Onboard Request	Approve Vendor	Create Vendor	Name	Email	Telephone	Date Created	View	View	View	View	View	View	View
			srgs	aeffea@fef	0987654322	Aug 21, 2023, 5:40:57 PM							
			hot hotter hottest	HotSause@gmail.com	0627329732	Aug 23, 2023, 2:45:32 PM							

Figure 1 Click View Add BEE Details Vendor Button.

This will navigate you to the “Vendor Details” screen where you will be able to view the Vendor Details. Click on the “BEE & Due Diligence” tab and then on the Add BEE Details button to add BEE Details to the Vendor.

The screenshot shows a web-based application interface titled "Vendor Details". At the top, there are four tabs: "Company Contact Info", "Company Overview", "Bank Details", and "BEE & Due Diligence". The "BEE & Due Diligence" tab is highlighted with a red border. Below the tabs, there is a message: "Vendor does not have any BEE Details". To the right of this message is a green button labeled "Add BEE Details", which is also highlighted with a red box. Further down, there is a section for a "Due Diligence Checklist" with a "Generate Checklist" link. At the bottom of the screen are two buttons: "Update" (green) and "Delete" (blue).

Figure 1 Click Add BEE Details Vendor Button

This will navigate you to the “Due Diligence Checklist” screen. There you will be able to update the Due Diligence Checklist. There you will follow a 10-step process editing the necessary details to be able to edit the Due Diligence Checklist for the vendor. Step one edits the “Due Diligence Checklist Details” and click the “Next” button to move onto step two. (Fields that are required will state so)

The screenshot shows a "Due Diligence Checklist" form. At the top, it says "Please fill in the following details:". Below this, there is a section titled "DUE DILIGENCE CHECKLIST DETAILS". In the center, there is a question: "Do you have a physical copy of the Due Diligence Checklist?". To the right of the question is a checkbox. Below the checkbox are two buttons: "Cancel" (blue) and "Next" (red), which is highlighted with a red box.

Figure 1 Click Next Due Diligence Checklist Details Vendor Button.

**1 “Do you have a physical copy of the due diligence checklist?”:** Check the Checkbox if you have a physical copy of the due diligence checklist of the company. (Not Compulsory)

**Step two edit the “Foundational Documents” and click the “Next” button to move onto step three. (Fields that are required will state so)**



**Due Diligence Checklist?**  
Please fill in the following details:

DUE DILIGENCE CHECKLIST DETAILS  
 FOUNDATIONAL DOCUMENTS

Mutual Non-Disclosure Agreement or Confidentiality Agreement:	<input type="checkbox"/>
Basic Company Information: <b>(Required)</b>	<input type="checkbox"/>
Ownership structure and affiliated entities:	<input type="checkbox"/>
Income tax number: <b>(Required)</b>	<input type="checkbox"/>
VAT number:	<input type="checkbox"/>
Company registration document:	<input type="checkbox"/>
Letters of good standing COID:	<input type="checkbox"/>
Has BEE?:	<input checked="" type="checkbox"/>
BEE level:	<input type="text" value="1"/>
BEE Certificate:	<input type="file" value="Choose File No file chosen"/>
Date of BEE validity:	<input type="date" value="Choose a date* MM/DD/YYYY"/>
Directors details and ID's:	<input type="checkbox"/>
Company Resolution Agreement:	<input type="checkbox"/>

**Back** **Next**

Figure 1 Click Next Foundational Documents Vendor Button.

1. **Mutual Non-Disclosure Agreement or Confidentiality Agreement**: Check the Checkbox if there is a mutual non-disclosure agreement or confidentiality agreement of the company. (Not Compulsory)
2. **Basic Company Information**: Check the Checkbox if you have the basic company information of the company. (Compulsory)
3. **Ownership Structure and Affiliated Entities**: Check the checkbox if you the company has ownership structure and affiliated entities details. (Not Compulsory)
4. **Income tax Number**: Check the Checkbox if you have the income tax number of the company. (Compulsory)
5. **Company Registration Document**: Check the Checkbox if you have the company registration document of the company. (Not Compulsory)
6. **Letter of Good Standing COID**: Check the Checkbox if you have the letter of co standing of the company. (Not Compulsory)
7. **Has BEE?**: Check the Checkbox if the company has BEE. (Compulsory)
  - **BEE Level**: Fill in the company's BEE level. (Compulsory)
  - **BEE Certificate**: Provide the company's BEE certificate. (Compulsory)
  - **Date of BEE Validity**: Choose the date of the company's date of BEE validity using a date picker. (Compulsory)
8. **Directors Details and ID's**: Check the Checkbox if you have the directors' details and ID's of the company. (Not Compulsory)



9. **“Company Resolution Agreement”:** Check the Checkbox if you have the resolution agreement of the company. (Not Compulsory)

**Step three edit the “Financials” and click the “Next” button to move onto step four. (Fields that are required will state so)**

**Due Diligence Checklist?**  
Please fill in the following details:

DUE DILIGENCE CHECKLIST DETAILS  
 FOUNDATIONAL DOCUMENTS  
 FINANCIALS

VAT Registration Certificate:	<input type="checkbox"/>
Tax Clearance Certificate:	<input type="checkbox"/>
Bank Stamped confirmation letter:	<input type="checkbox"/>

**Back** **Next**

Figure 1 Click Next Financials Vendor Button.

- “Vat Registration Certificate”:** Check the Checkbox if you have the VAT registration certificate of the company. (Not Compulsory)
- “TAX Clearance Certificate”:** Check the Checkbox if you have the TAX clearance certificate of the company. (Not Compulsory)
- “Bank Stamped Confirmation Letter”:** Check the checkbox if you have the bank stamped confirmation letter of the company. (Not Compulsory)

**Step four edit the “Sub-Contruction” and click the “Next” button to move onto step five. (Fields that are required will state so)**

**Due Diligence Checklist?**  
Please fill in the following details:

DUE DILIGENCE CHECKLIST DETAILS  
 FOUNDATIONAL DOCUMENTS  
 FINANCIALS  
 SUB-CONTRACTING

Name of sub-contractor:	<input type="checkbox"/>
Provide similar documents as for main supplier (in case of company):	<input type="checkbox"/>
Provide copy of ID, qualifications, accreditations and professional memberships (in case of individual):	<input type="checkbox"/>

**Back** **Next**

Figure 1 Click Next Sub-Contracting Vendor Button.



1. **Name of Sub-Contractor**: Check the Checkbox if you have the name of the sub-contractor of the company. (Not Compulsory)
2. **Provide similar documents as for main supplier (In case of company)**: Check the Checkbox if you have the similar documents of main supplier of the company. (Not Compulsory)
3. **Provide copy of ID, qualifications, accreditations and professional memberships (In case of individual)**: Check the checkbox if you have the copy of ID's, qualifications, accreditations, and professional memberships of the individual. (Not Compulsory)

**Step Five edit the “Insurance” and click the “Next” button to move onto step six. (Fields that are required will state so)**

**Due Diligence Checklist?**  
Please fill in the following details:

- DUE DILIGENCE CHECKLIST DETAILS
- FOUNDATIONAL DOCUMENTS
- FINANCIALS
- SUB-CONTRACTING
- INSURANCE

General liability insurance:

Add new General liability Insurance Document?  No file chosen

Cyber insurance:

Add a new Cyber Insurance Document?  No file chosen

Professional indemnity insurance (if applicable):

Add a new Professional Indemnity Insurance Document?  No file chosen

Other specific insurance required per service/industry:

Add new Other specific insurance Document?  No file chosen

[Back](#) Next

Figure 1 Click Next Insurance Vendor Button.

1. **General Liability Insurance**: Check the Checkbox if you have the general liability insurance of the company. (Not Compulsory)
  - **Add new General liability Insurance Document?**: Provide the general liability insurance document of the company. (Compulsory)
2. **Cyber insurance:**: Check the Checkbox if you have the Cyber Insurance of the company. (Not Compulsory)



- "Add a new Cyber Insurance Document?": Provide the cyber insurance document of the company. (Compulsory)
3. "Professional indemnity insurance (if applicable):": Check the checkbox if you have the professional indemnity insurance of the company. (Not Compulsory)
- "Add a new Professional Indemnity Insurance Document?": Provide the professional indemnity insurance document of the company. (Compulsory)
4. "Other specific insurance required per service/industry": Check the checkbox if you have other specific insurance of the company. (Not Compulsory)
- "Add new Other specific insurance Document?": Provide the other specific insurance document of the company. (Compulsory)

**Step six edit the “License or Professional Accreditation” and click the “Next” button to move onto step seven. (Fields that are required will state so)**

The screenshot shows a web-based form titled "Due Diligence Checklist". At the top, there's a note: "Please fill in the following details:" followed by a list of checked categories: DUE DILIGENCE CHECKLIST DETAILS, FOUNDATIONAL DOCUMENTS, FINANCIALS, SUB-CONTRACTING, and INSURANCE. Below this, under the heading "LICENSING OR PROFESSIONAL ACCREDITATION", there's a section with three checkboxes: "Licenses required", "Accreditation required", and "Professional membership required". All three checkboxes are currently unchecked. At the bottom of this section are two buttons: "Back" and "Next", with "Next" being highlighted with a red rectangular border.

Figure 1 Click Next License or professional accreditation Vendor Button.

1. "Licenses required:": Check the Checkbox if the license is required of the company. (Not Compulsory)
2. "Accreditation required:": Check the Checkbox if accreditation is required of the company. (Not Compulsory)
3. "Professional membership required": Check the checkbox if professional membership is required of the company. (Not Compulsory)

**Step seven edit the “Information Security” and click the “Next” button to move onto step eight. (Fields that are required will state so)**



The screenshot shows a web-based questionnaire for information security vendors. On the left, there's a sidebar with three categories: INSURANCE (with a blue icon), LICENSES OR PROFESSIONAL ACCREDITATION (with a blue icon), and INFORMATION SECURITY (with a grey icon). The main content area contains several questions with checkboxes. One question under 'Protection of personal information by design' has a checked checkbox. Below it, a dropdown menu is set to 'Controller (C)'. The 'Next' button at the bottom right is highlighted with a red box.

Figure 1 Click Next Information Security Vendor Button.

1. **Business continuity plan**: Check the Checkbox if you have the business community plan of the company. (Not Compulsory)
2. **Disaster recovery plan**: Check the Checkbox if you have the disasters recovery plan of the company. (Not Compulsory)
3. **Protection of personal information by design**: Check the checkbox if you have the protection of personal information by design of the company. (Not Compulsory)
  - **Does the contract set out what personal data is used for what purpose?**: Check the checkbox if the contract sets out what personal data is used of the company. (Compulsory)
  - **Is the contracted partner a controller (C), joint controller (JC), processor (P) or sub-processor (SP)?**: Choose one of the options of the company. (Compulsory)
  - **Depending on the controller/processor relationship, do you have a Data Processing Agreement or a Joint Controller Agreement in place?**: Check the checkbox if you have the data processing agreement or joint controller agreement in place with the company. (Compulsory)
  - **Does the contract highlight the importance of confidentiality?**: Check the checkbox if the contract highlights the importance of confidentiality. (Compulsory)



## Step 8

- **“Does the contract provide for audits and inspections?”:** Check the checkbox if the contract provided audits and inspections. (Compulsory)
  - **“Is it clear who is accountable and liable for different activities?”:** Check the checkbox if the contract is clear on who is accountable and liable for different activities. (Compulsory)
  - **“Is there a provision to cover third party processing of data?”:** Check the checkbox if there is a proven to cover third party processing of data efforts of the company. (Compulsory)
  - **“Does a process exist for managing data when the contract ends?”:** Check the checkbox if a processing does exist for managing date when the contract ends. (Compulsory)
  - **“Is the personal data that's being processed detailed in your and their 'Record of Processing Activities'?”:** Check the checkbox if the professional data that is being processed detailed in, you're and the company's 'Record of Processing Activities'. (Compulsory)
  - **“Does the supplier hold any form of certification for their processing activities?”:** Check the checkbox if the supplier holds any form of certification of their processing activities of the company. (Compulsory)
4. **“History of data breaches and security incidents”:** Check the checkbox if you have the History of data breaches and security incidents of the company. (Not Compulsory)
5. **“Site visits to assess security controls (if required)”:** Check the checkbox if you have site visits to assess security controls of the company. (Not Compulsory)

**Step eight edit the “Policy Review” and click the “Next” button to move onto step nine. (Fields that are required will state so)**



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**MOYO**

DUE DILIGENCE CHECKLIST DETAILS

FOUNDATIONAL DOCUMENTS

FINANCIALS

SUB-CONTRACTING

INSURANCE

LICENSES OR PROFESSIONAL ACCREDITATION

INFORMATION SECURITY

POLICY REVIEW

Information security or Data protection policy:

Privacy policy:

Data retention and destruction policy:

Anti-bribery and anti-corruption policy:

Ethics policy:

Conflict of interest policy:

Customer complaints policy:

**Back** **Next**

Figure 1 Click Next Policy Review Vendor Button.

1. **Information security or Data protection policy**: Check the Checkbox if you have the Information security or Date protection policy of the company. (Not Compulsory)
2. **Privacy policy**: Check the Checkbox if you have the privacy policy of the company. (Not Compulsory)
3. **Data retention and destruction policy**: Check the checkbox if you have the data retention and destruction policy of the company. (Not Compulsory)
4. **Anti-bribery and anti-corruption policy**: Check the checkbox if you have the anti-bribery and anti-corruption policy of the company. (Not Compulsory)
5. **Ethics policy**: Check the checkbox if you have the ethics policy of the company. (Not Compulsory)
6. **Conflict of interest policy**: Check the checkbox if you have the conflict-of-interest policy of the company. (Not Compulsory)
7. **Customer complaints policy**: Check the checkbox if you have the customer complaints policy of the company. (Not Compulsory)

**Step nine edit the “Business References” and click the “Next” button to move onto step ten. (Fields that are required will state so)**



The screenshot shows a web-based application titled "MOYO". At the top, there's a navigation bar with links for Administration, Inventory, Finance, Procurement, Vendor, Reports, Help, and user icons. Below the navigation, a section titled "Due Diligence Checklist" is displayed. A sub-section titled "Please fill in the following details:" contains a list of items with checkboxes: DUE DILIGENCE CHECKLIST DETAILS, FOUNDATIONAL DOCUMENTS, FINANCIALS, SUB-CONTRACTING, INSURANCE, LICENSES OR PROFESSIONAL ACCREDITATION, INFORMATION SECURITY, POLICY REVIEW, and BUSINESS REFERENCES. Below this list is a text input field labeled "Details of at least two business references:" with a placeholder "Please enter details here". At the bottom of this section are "Back" and "Next" buttons, with "Next" being highlighted with a red border.

Figure 1 Click Next Business References Vendor Button.

1. **"Details of at least two business references":** Check the Checkbox if you have al least two business references of the company. (Not Compulsory)

**Step ten “Done” and click the “Update” button. Once you clicked the update button the Due Diligence checklist of the vendor will be updated on the system.**

This screenshot shows the same web-based application as Figure 1. The "Due Diligence Checklist" section is visible, along with the "Business References" input field and "Back" and "Next" buttons. Below the main form, a new section titled "Done" is shown. It contains a list of items with checkboxes identical to the first section: DUE DILIGENCE CHECKLIST DETAILS, FOUNDATIONAL DOCUMENTS, FINANCIALS, SUB-CONTRACTING, INSURANCE, LICENSES OR PROFESSIONAL ACCREDITATION, INFORMATION SECURITY, POLICY REVIEW, and BUSINESS REFERENCES. At the bottom of this section is a button labeled "Done". Below the "Done" section is a confirmation message: "Please ensure that all details are correct". At the very bottom of the page are "Back" and "Update" buttons, with "Update" being highlighted with a red border.

Figure 1 Click Update Done Vendor Button.



# Reports Section

## Reports:

Generate Approved Vendor Report, Generate BEE Spend Report, Generate Vendor Spend Report, Generate Consumable Inventory Report, Generate Business Unit Allocation Report, and Generate Budget Variance Report:

### Step 1 Navigate to Report screen:

Navigate to the Report Screen by clicking on the “Report” button on the top navbar or on the “Report” button on the home screen:

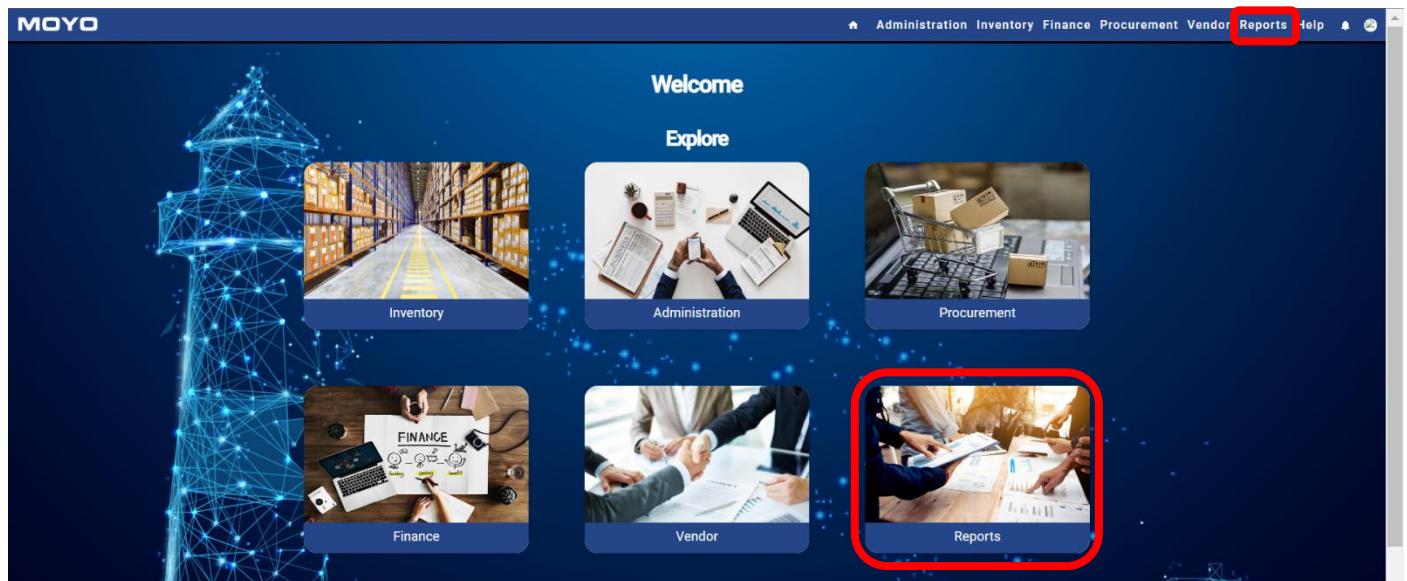


Figure 1 Home Screen to Report Screen

The image shows the 'Reports' screen of the MOYO application. At the top, there is a navigation bar with links for Administration, Inventory, Finance, Procurement, Vendor, Reports (which is highlighted with a red box), and Help. Below the navigation bar, the word 'Reports' is centered in a large, bold font. Underneath, there is a table with six rows, each containing a report title and a 'Generate Report' button. The first row, 'Generate Approved Vendor List Report', has its 'Generate Report' button highlighted with a red box. The other five rows are: 'Generate BEE Spent Report', 'Generate Vendor Spent Report', 'Generate Consumable Inventory management report', 'Generate Business Unit allocation Report', and 'Generate Budget Variance Report'.

Figure 1 Report Screen

## Step 2 Generate Approved Vendor report:

Then Click on the “Generate” button on the Generate Approved Vendor row. Then the system will generate the Approved Vendor list Report and display it to you in a new tab.



Figure 1 Generate Approved Vendor

You could also alternatively click on the “v” then click on the “Generate Report” Button. Then the system will generate the Approved Vendor list Report and display it to you in a new tab.



Figure 1 Alt Generate Approved Vendor



You could also alternatively click on the “v” then click on the “Download Report” Button. Then the system will generate the Approved Vendor list Report and download it on your device.



Figure 1 Download Approved Vendor

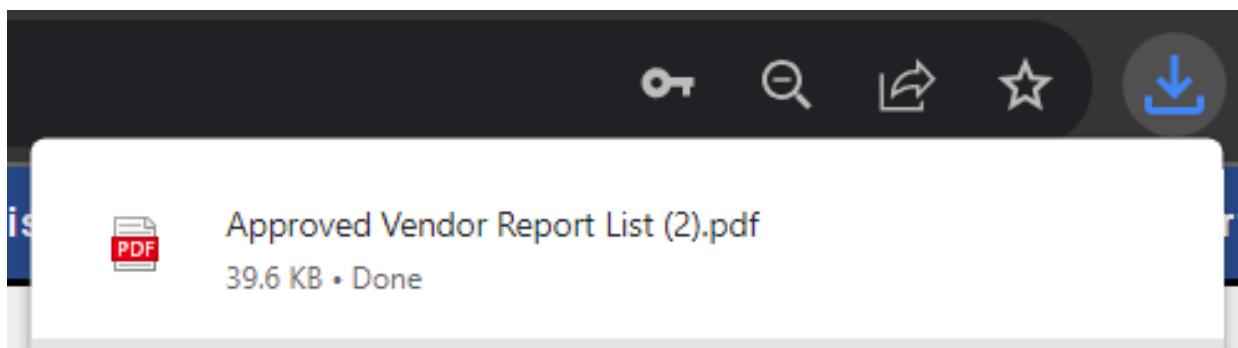


Figure 1 Download Approved Vendor Report

### Step 3 Generate BEE Spend report:

Then Click on the “Generate” button on the Generate BEE Spend row:



Figure 1 Generate BEE Spend

This will navigate you to the Generate BEE Spend Report screen. Then Click the “Generate” button to generate the bee spend report. Then the system will generate the BEE Spend Report and display it to you in a new tab:

The screenshot shows a blue header bar with the text 'SELECT FILTER CRITERIA'. Below it is a section titled 'Please provide the following details:' containing a date range input field. The input field shows '23/08/2023 – 24/08/2023'. Below the input field is a text placeholder 'DD/MM/YYYY – DD/MM/YYYY'. At the bottom are two buttons: a green 'Generate' button with a red rounded rectangle around it, and a blue 'Cancel' button.

Figure 1 BEE Spend Screen

1. Date Range: Provide the date range for the BEE Spend report to consider. (Compulsory)



You could also alternatively click on the “v” then click on the “Generate Report” Button:



Figure 1 Alt Generate Bee Spend

This will navigate you to the Generate BEE Spend Report screen. Then Click the “Generate” button to generate the bee spend report. Then the system will generate the BEE Spend Report and display it to you in a new tab:

The screenshot shows a 'SELECT FILTER CRITERIA' screen. At the top, it says 'Please provide the following details:'. Below that is a date range input field with placeholder text 'Enter a date range' and a calendar icon. The current date range is '23/08/2023 – 24/08/2023'. Below the date range is a text field for 'DD/MM/YYYY – DD/MM/YYYY'. At the bottom are two buttons: a green 'Generate' button with white text, which is highlighted with a red box, and a blue 'Cancel' button with white text.

Figure 1 Generate BEE Spend Screen

1. Date Range: Provide the date range for the BEE Spend report to consider. (Compulsory)

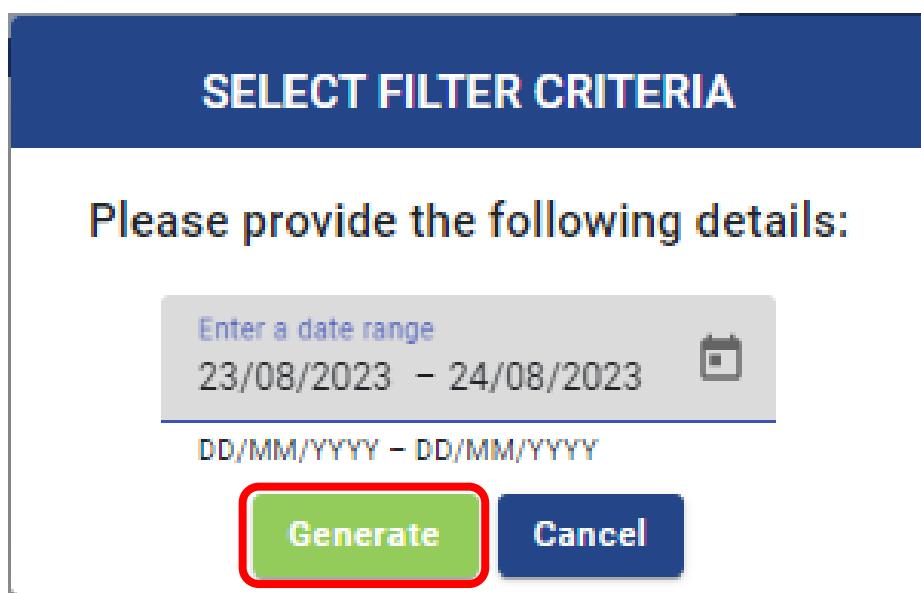


You could also alternatively click on the “v” then click on the “Download Report” Button:



Figure 1 Download BEE Spend

This will navigate you to the Generate BEE Spend Report screen. Then Click the “Generate” button to generate the bee spend report.



SELECT FILTER CRITERIA

Please provide the following details:

Enter a date range  
23/08/2023 – 24/08/2023

DD/MM/YYYY – DD/MM/YYYY

Generate Cancel

Figure 1 Download BEE Spend Screen

1. Date Range: Provide the date range for the BEE Spend report to consider. (Compulsory)

Then the system will generate the BEE Spend Report and download it on your device:

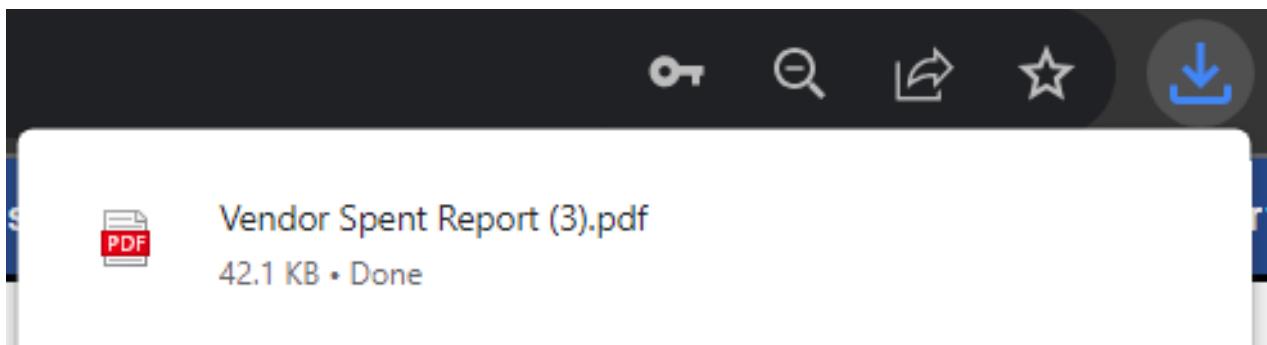


Figure 1 Downloaded Bee Spend Report

#### Step 4 Generate Vendor Spend report:

Then Click on the “Generate” button on the Generate Vendor Spend row:



Figure 1 Generate Consumable Inventory management

This will navigate you to the Generate Vendor Spend Report screen. Then Click the “Generate” button to generate the vendor spend report. Then the system will generate the Vendor Spend Report and display it to you in a new tab:



## SELECT FILTER CRITERIA

Please provide the following details:

Enter a date range  
23/08/2023 – 24/08/2023 

DD/MM/YYYY – DD/MM/YYYY

**Generate** **Cancel**

Figure 1 Vendor Spend Screen

1. Date Range: Provide the date range for the Vendor Spend report to consider. (Compulsory)

You could also alternatively click on the “v” then click on the “Generate Report” Button:



Figure 1 Alt Generate Vendor Spend

This will navigate you to the Generate Vendor Spend Report screen. Then Click the “Generate” button to generate the vendor spend report. Then the system will generate the Vendor Spend Report and display it to you in a new tab:



## SELECT FILTER CRITERIA

Please provide the following details:

Enter a date range  
23/08/2023 – 24/08/2023 

DD/MM/YYYY – DD/MM/YYYY

**Generate** **Cancel**

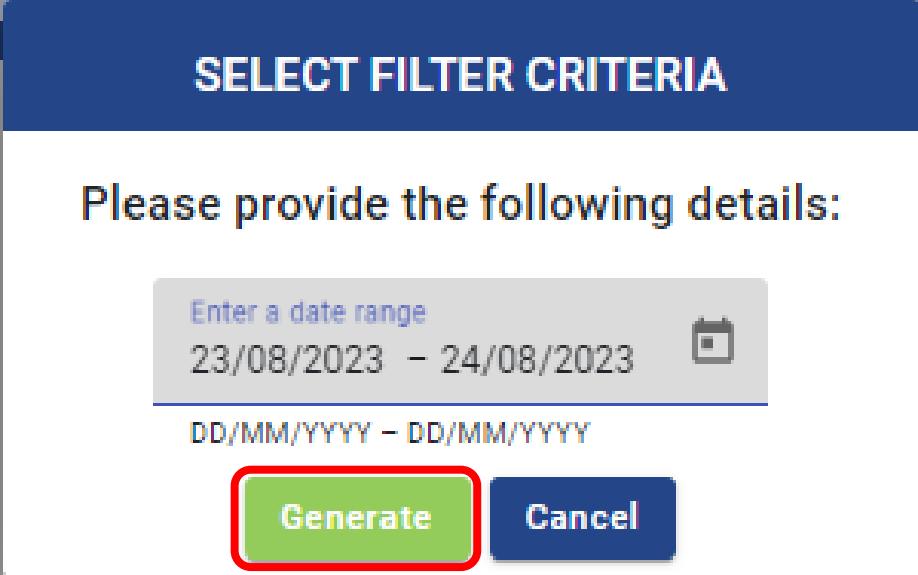


Figure 1 Generate Vendor Spend Screen

1. **Date Range:** Provide the date range for the Vendor Spend report to consider. (Compulsory)

You could also alternatively click on the “v” then click on the “Download Report” Button:



Figure 1 Download Vendor Spend

This will navigate you to the Generate vendor Spend Report screen. Then Click the “Generate” button to generate the vendor spend report.



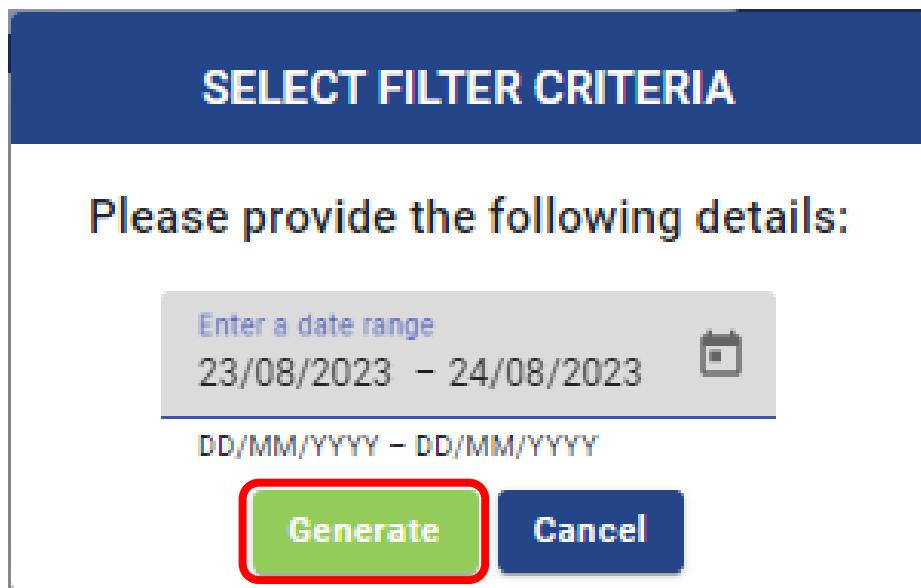


Figure 1 Download Vendor Spend Screen

1. Date Range: Provide the date range for the Vendor Spend report to consider. (Compulsory)

Then the system will generate the Vendor Spend Report and download it on your device:

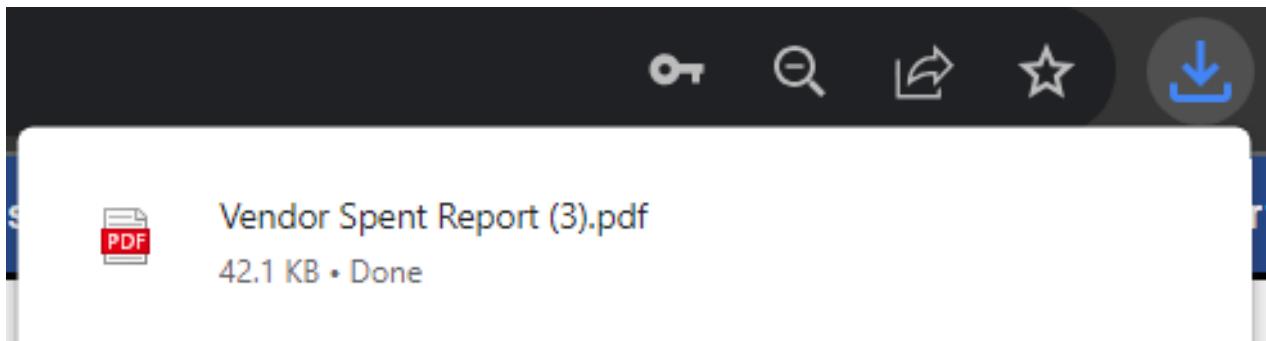


Figure 1 Downloaded Vendor Spend Report

## Step 5 Generate Consumable Inventory Management report:

Then Click on the “Generate” button on the Generate Consumable Inventory Management row:



Figure 1 Generate Vendor Spend

This will navigate you to the Generate Consumable Inventory Management Report screen. Then Click the “Generate” button to generate the Consumable Inventory Management report. Then the system will generate the Consumable Inventory Management Report and display it to you in a new tab:



Figure 1 Consumable Inventory Management Screen



1. Date Range: Provide the date range for the Consumable Inventory Management report to consider.  
(Compulsory)

You could also alternatively click on the “v” then click on the “Generate Report” Button:



Figure 1 Alt Generate Consumable Inventory Management

This will navigate you to the Generate Consumable Inventory Management Report screen. Then Click the “Generate” button to generate the Consumable Inventory Management report. Then the system will generate the Consumable Inventory Management Report and display it to you in a new tab:

The image shows a modal dialog box titled 'SELECT FILTER CRITERIA'. Inside, there is a message 'Please provide the following details:'. Below this is a date range input field with the placeholder 'Enter a date range' and the current selection '23/08/2023 – 24/08/2023'. To the right of the input field is a calendar icon. Below the input field is a note 'DD/MM/YYYY – DD/MM/YYYY'. At the bottom of the modal are two buttons: a green 'Generate' button with white text, which is highlighted with a red border, and a dark blue 'Cancel' button with white text.

Figure 1 Generate Consumable Inventory Management Screen



1. Date Range: Provide the date range for the Consumable Inventory Management report to consider.  
(Compulsory)

You could also alternatively click on the “v” then click on the “Download Report” Button:



Figure 1 Download Consumable Inventory Management

This will navigate you to the Generate Consumable Inventory Management Report screen. Then Click the “Generate” button to generate the Consumable Inventory Management report.

The screenshot shows a 'SELECT FILTER CRITERIA' screen. At the top, it says 'Please provide the following details:'. Below that is a date range input field showing '23/08/2023 – 24/08/2023'. The 'Generate' button at the bottom left is highlighted with a red box. The 'Cancel' button at the bottom right is also present.

Figure 1 Download Consumable Inventory Management Screen



1. **Date Range:** Provide the date range for the Consumable Inventory Management report to consider.  
(Compulsory)

Then the system will generate the Consumable Inventory Management Report and download it on your device:

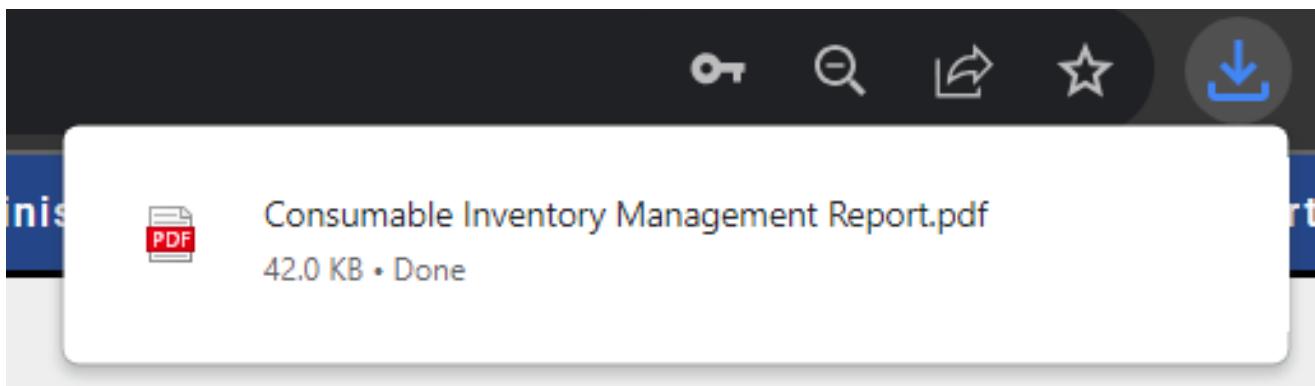


Figure 1 Downloaded Consumable Inventory Management Report

## Step 6 Generate Business Unit Allocation report:

Then Click on the “Generate” button on the Generate Business Unit Allocation row:



Figure 1 Generate Business Unit Allocation

This will navigate you to the Generate Business Unit Allocation Report screen. Then Click the “Generate” button to generate the Business Unit Allocation report. Then the system will generate the Business Unit Allocation Report and display it to you in a new tab:

The screenshot shows a blue header bar with the text "SELECT FILTER CRITERIA". Below it, a message says "Please provide the following details:". There is a text input field labeled "Enter a year\*" with a placeholder "YYYY" and a calendar icon. At the bottom, there are two buttons: a green "Generate" button with white text and a blue "Cancel" button with white text. The "Generate" button is highlighted with a red rectangular border.

Figure 1 Business Unit Allocation Screen

1. Date Range: Provide the year for the Business Unit Allocation report to consider. (Compulsory)

You could also alternatively click on the “v” then click on the “Generate Report” Button:

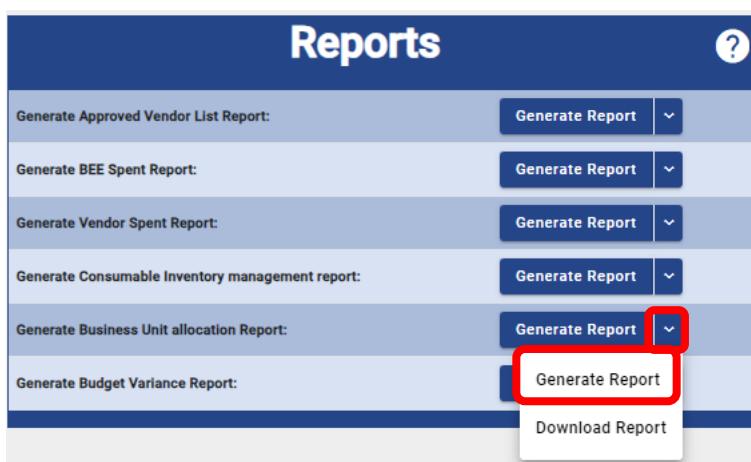


Figure 1 Alt Generate Business Unit Allocation



This will navigate you to the Generate Business Unit Allocation Report screen. Then Click the “Generate” button to generate the Business Unit Allocation report. Then the system will generate the Business Unit Allocation Report and display it to you in a new tab:

The screenshot shows a web-based application interface titled "SELECT FILTER CRITERIA". At the top, there is a text input field labeled "Enter a year\*" with a placeholder "YYYY" and a small calendar icon to its right. Below this input field are two large buttons: a green "Generate" button and a blue "Cancel" button. The "Generate" button is highlighted with a red rectangular border.

Figure 1 Generate Business Unit Allocation Screen

1. Date Range: Provide the year for the Business Unit Allocation report to consider. (Compulsory)

You could also alternatively click on the “v” then click on the “Download Report” Button:

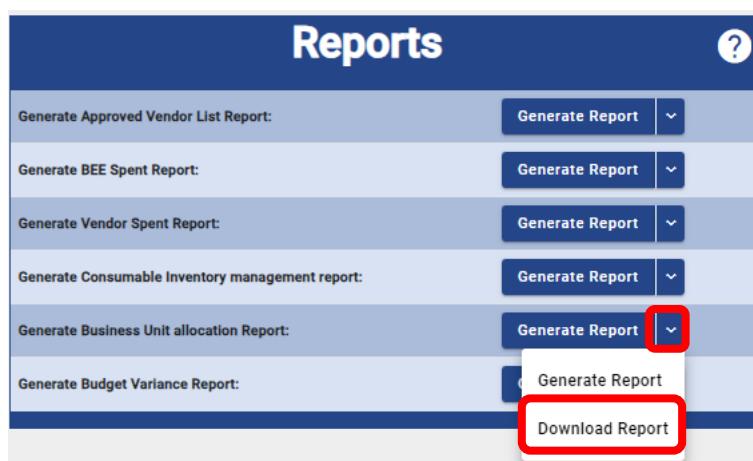


Figure 1 Download Business Unit Allocation



This will navigate you to the Generate Business Unit Allocation Report screen. Then Click the “Generate” button to generate the Business Unit Allocation report.

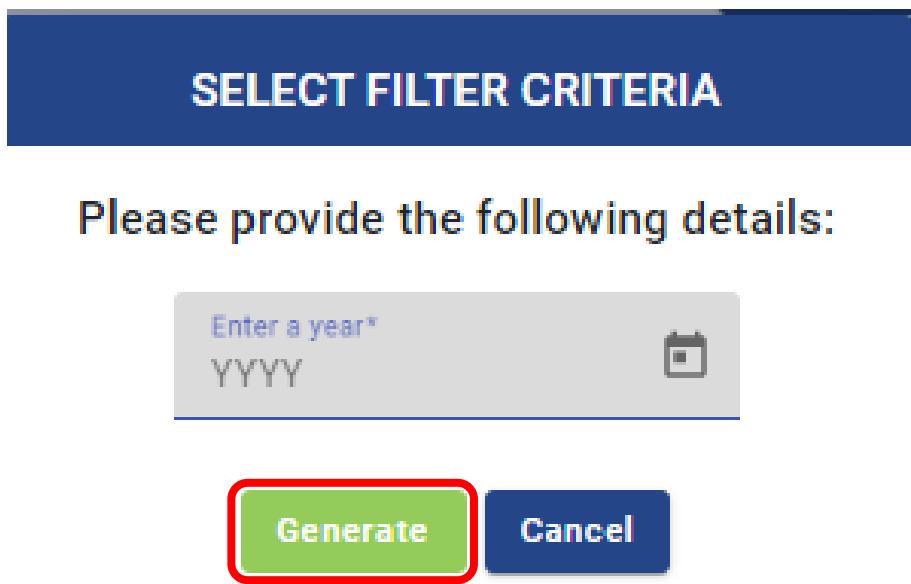


Figure 1 Download Business Unit Allocation Screen

1. Date Range: Provide the year for the Business Unit Allocation report to consider. (Compulsory)

Then the system will generate the Business Unit Allocation Report and download it on your device:

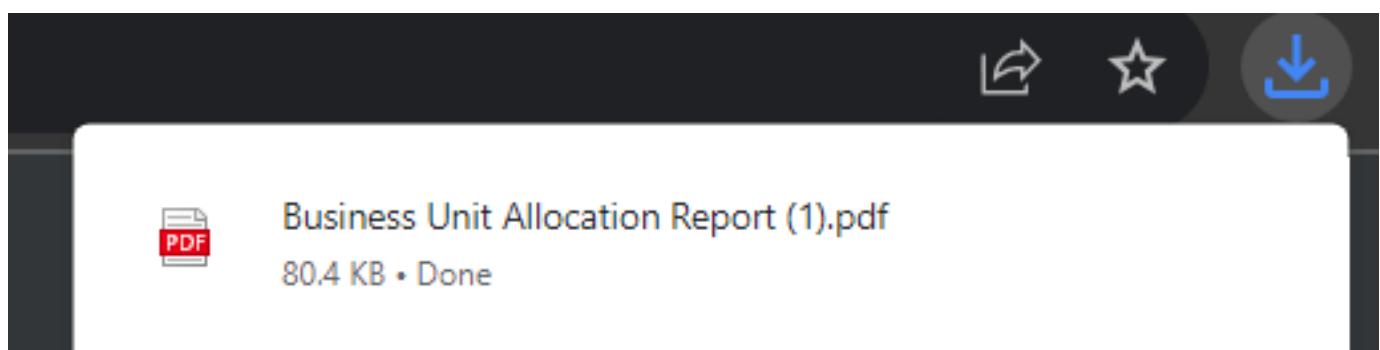


Figure 1 Downloaded Business Unit Allocation Report



## Step 7 Generate Budget Variance report:

Then Click on the “Generate” button on the Generate Budget Variance row:



Figure 1 Generate Budget Variance

This will navigate you to the Generate Budget Variance Report screen. Then Click the “Generate” button to generate the Budget Variance report. Then the system will generate the Budget Variance Report and display it to you in a new tab:

The screenshot shows a 'SELECT FILTER CRITERIA' screen. At the top, it says 'Please provide the following details:'. Below is a form field for 'Enter a year\*' with a 'YYYY' placeholder and a calendar icon. At the bottom are two buttons: a green 'Generate' button with a red border and a blue 'Cancel' button.

Figure 1 Budget Variance Screen



1. Date Range: Provide the year for the Budget Variance report to consider. (Compulsory)

You could also alternatively click on the “▼” then click on the “Generate Report” Button:

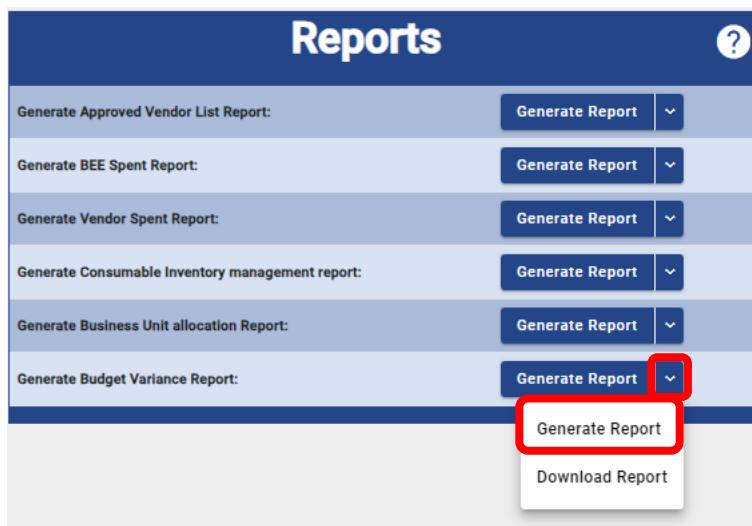


Figure 1 Alt Generate Budget Variance

This will navigate you to the Generate Budget Variance Report screen. Then Click the “Generate” button to generate the Budget Variance report. Then the system will generate the Budget Variance Report and display it to you in a new tab:

The screenshot shows a 'SELECT FILTER CRITERIA' screen. At the top, it says 'Please provide the following details:'. Below this is a form field with a placeholder 'Enter a year\*' and a 'YYYY' input field. To the right of the input field is a calendar icon. At the bottom of the screen are two buttons: a green 'Generate' button with a red border and a blue 'Cancel' button.

Figure 1 Generate Budget Variance Screen



1. Date Range: Provide the year for the Budget Variance report to consider. (Compulsory)

You could also alternatively click on the “v” then click on the “Download Report” Button:

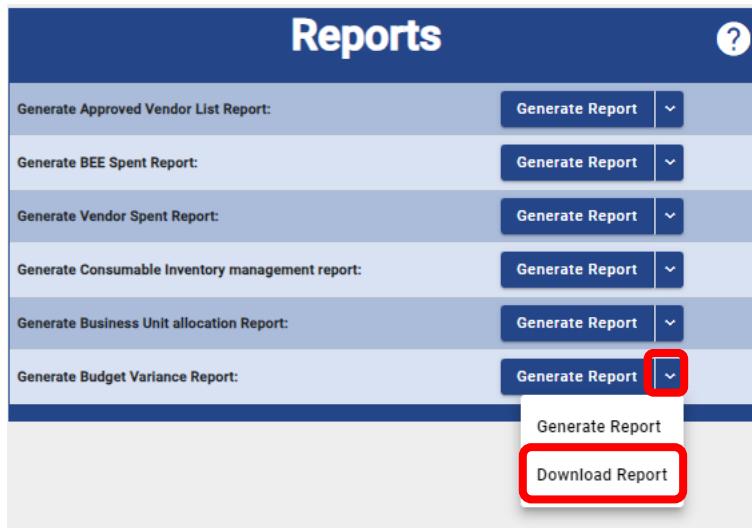


Figure 1 Download Budget Variance

This will navigate you to the Generate Budget Variance Report screen. Then Click the “Generate” button to generate the Budget Variance report.

The screenshot shows a 'SELECT FILTER CRITERIA' screen. It displays a message 'Please provide the following details:' and a date input field labeled 'Enter a year\*' with a 'YYYY' placeholder and a calendar icon. At the bottom are two buttons: a green 'Generate' button and a blue 'Cancel' button. The 'Generate' button is highlighted with a red box.

Figure 1 Download Budget Variance Screen



1. Date Range: Provide the year for the Budget Variance report to consider. (Compulsory)

Then the system will generate the Budget Variance Report and download it on your device:

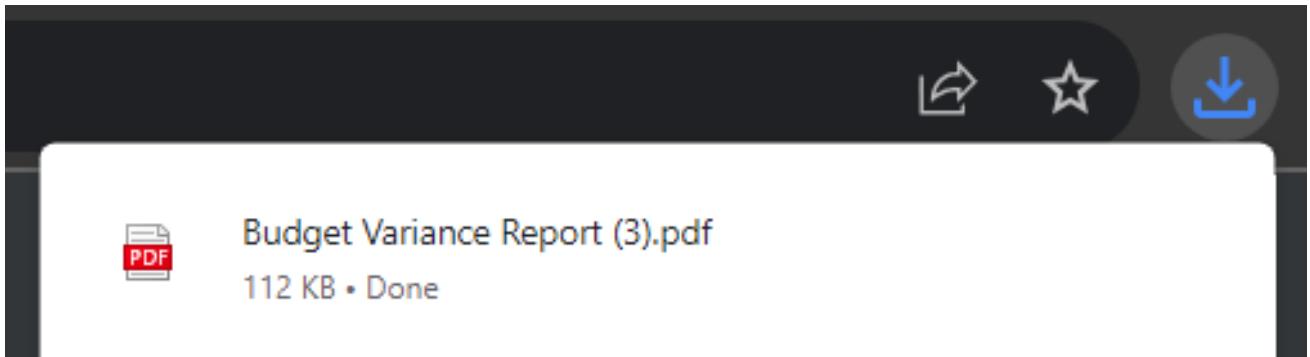


Figure 1 Downloaded Budget Variance Report

# Notification Section

## Notifications:

Vendor Notifications, Inventory Notifications, Procurement Notifications, and Delegation of Authority Notification:

### Step 1 Navigate to Notification screen:

Navigate to the Notification Screen by clicking on the Bell Icon button on the top navbar:



Figure 1 Home Screen to Notification Screen

This will Navigate you to the Notification screen.

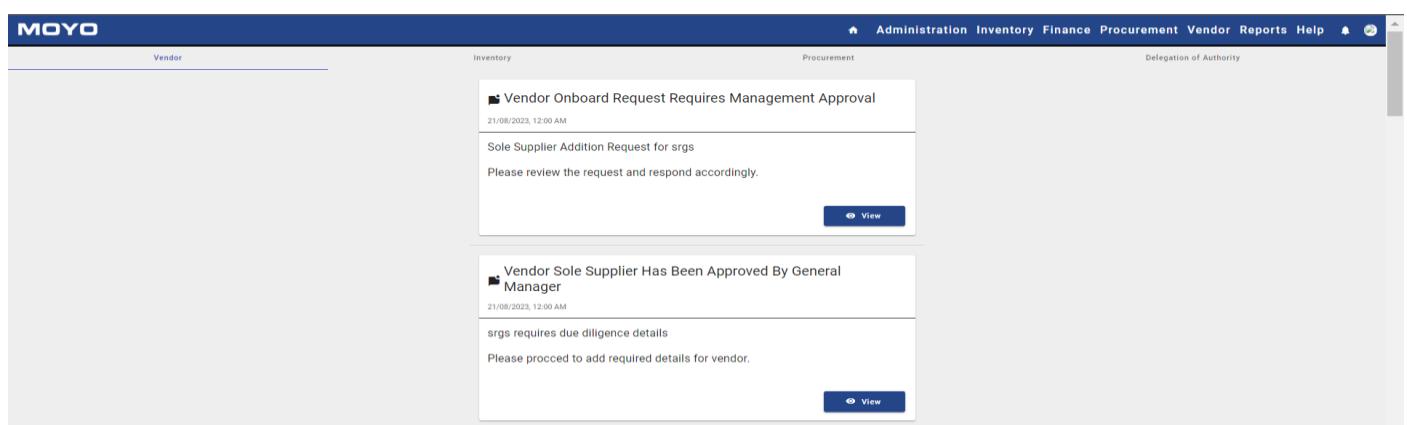
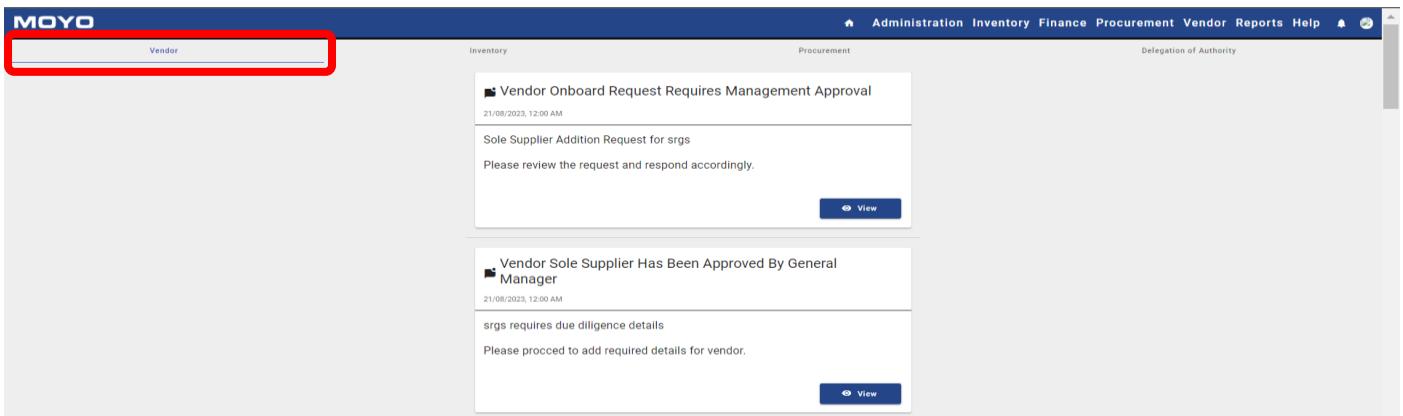


Figure 1 Notification Screen



## Step 2 Vendor Notifications:

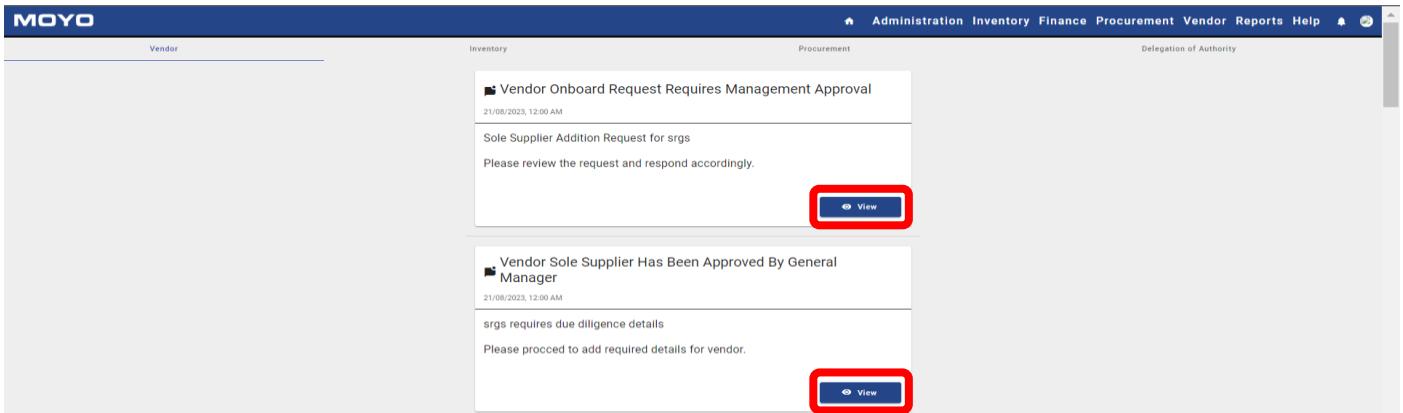
Then Click on the “Vendor” tab on the Notification screen. The system will then display all the notifications you have regarding the Vendor Section.



The screenshot shows the MOYO software interface. The top navigation bar includes links for Administration, Inventory, Finance, Procurement, Vendor, Reports, Help, and Delegation of Authority. A green bar at the top contains the MOYO logo. The main menu is titled 'Vendor'. Below the menu, there are two notifications listed in a card format. The first notification is about a vendor onboard request requiring management approval. The second is about a sole supplier being approved by the general manager. Each notification has a 'View' button at the bottom, which is highlighted with a red box.

Figure 1 Vendor tab view

Then you click on the “View” button on the notification popup. This will navigate you to Vendor section part of the system that the notifications are about.



This screenshot is identical to Figure 1, showing the MOYO software interface with the Vendor tab selected. It displays two notifications. The 'View' button for the first notification ('Vendor Onboard Request Requires Management Approval') is highlighted with a red box.

Figure 1 Click View Vendor Notification



## Step 3 Inventory Notifications:

Then Click on the “Inventory” tab on the Notification screen. The system will then display all the notifications you have regarding the Inventory Section.

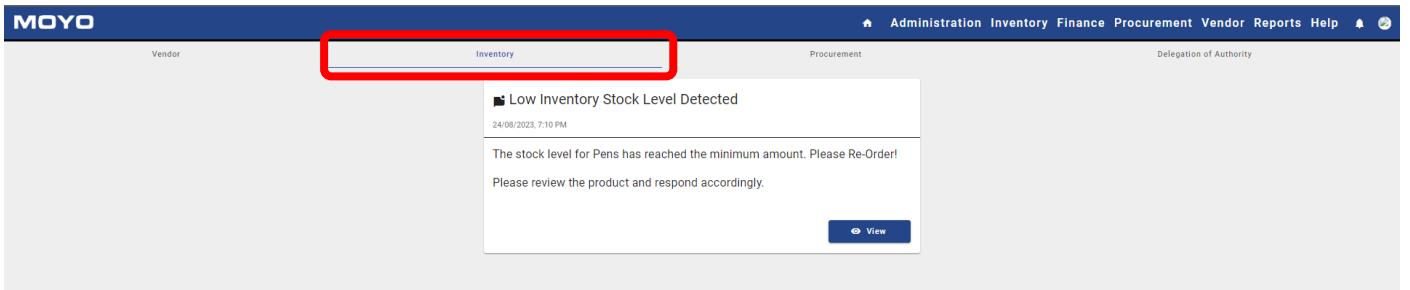


Figure 1 Inventory tab view

Then you click on the “View” button on the notification popup. This will navigate you to Inventory section part of the system that the notifications are about.

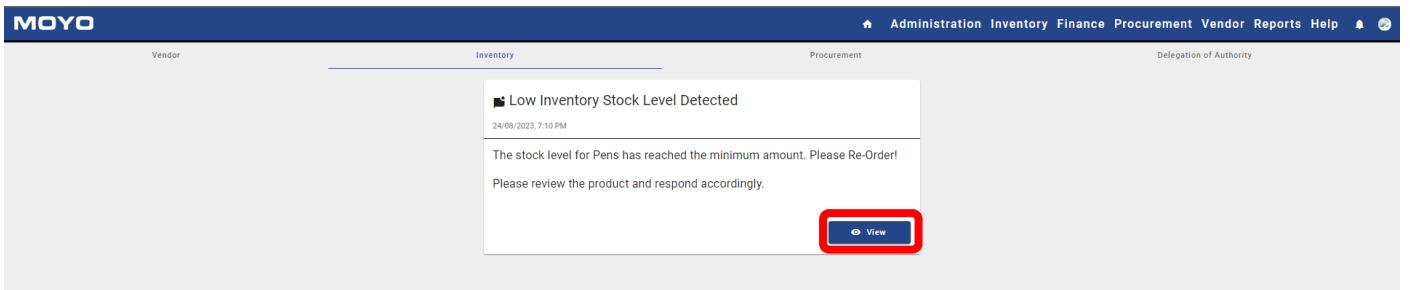
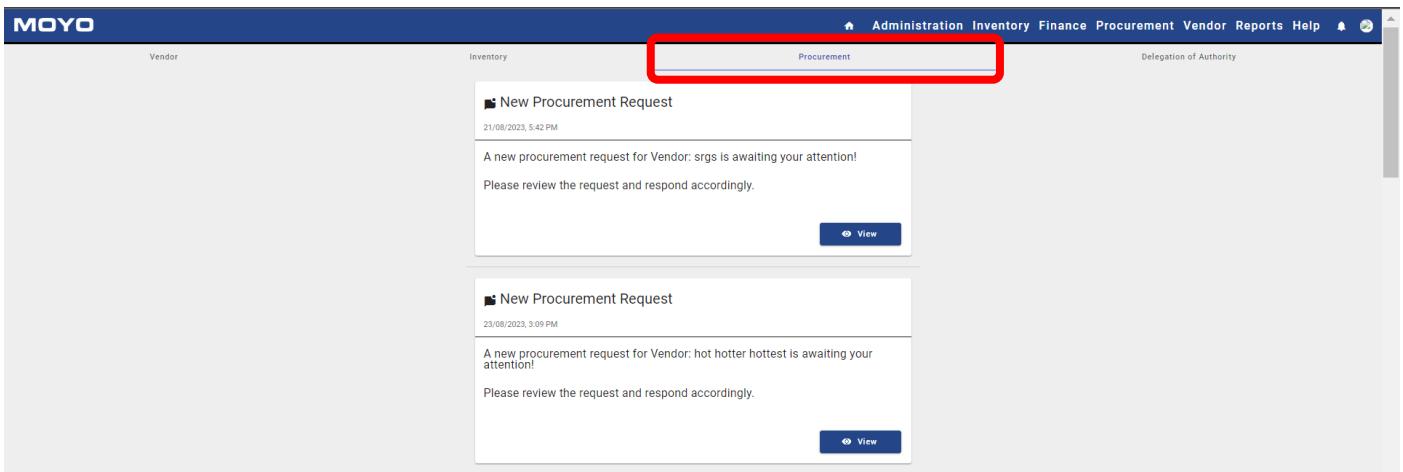


Figure 1 Click View Inventory Notification



## Step 4 Procurement Notifications:

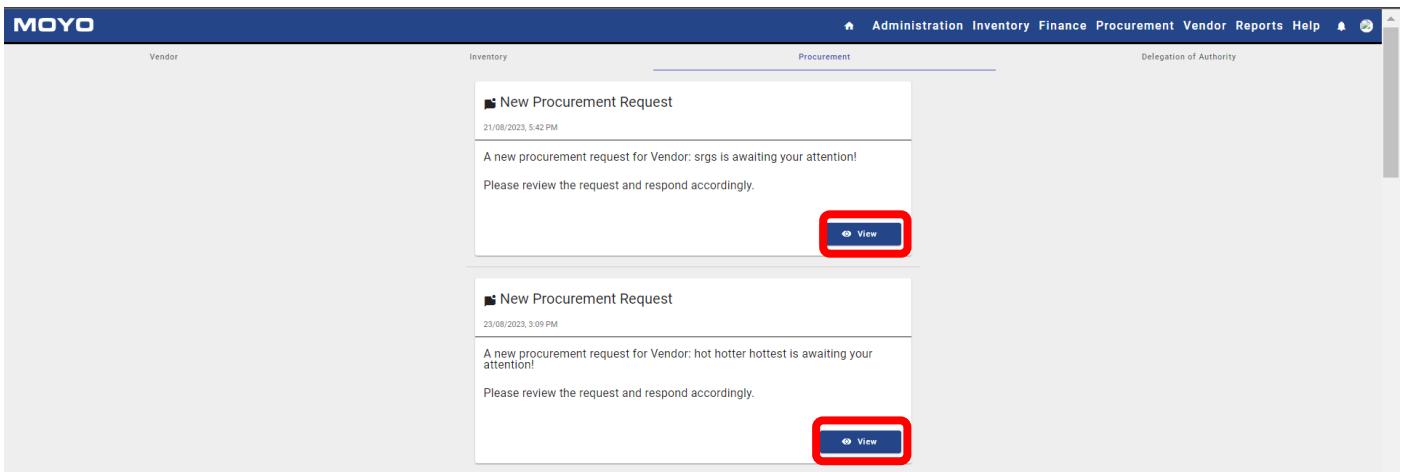
Then Click on the “Procurement” tab on the Notification screen. The system will then display all the notifications you have regarding the Procurement Section.



The screenshot shows the MOYO software interface. The top navigation bar has tabs for Administration, Inventory, Finance, Procurement, Vendor, Reports, Help, and Delegation of Authority. The 'Procurement' tab is highlighted with a red box. Below the navigation bar, there are two notification cards. Each card has a small icon, the title 'New Procurement Request', the date and time (e.g., 21/08/2023, 5:42 PM), a brief description ('A new procurement request for Vendor: srgs is awaiting your attention!'), and a 'View' button at the bottom. The entire notification section is enclosed in a red box.

Figure 1 Procurement tab view

Then you click on the “View” button on the notification popup. This will navigate you to Procurement section part of the system that the notifications are about.



The screenshot shows the same MOYO software interface as Figure 1, but with a focus on the first notification card. The 'View' button for the first 'New Procurement Request' from 'srgs' is highlighted with a red box. The notification card displays the vendor name, date, and a brief description. Below the notification, there is some additional text and another 'View' button.

Figure 1 Click View Procurement Notification



## Step 5 Delegation of Authority Notifications:

Then Click on the “Delegation of Authority” tab on the Notification screen. The system will then display all the notifications you have regarding the Delegation of Authority Section.

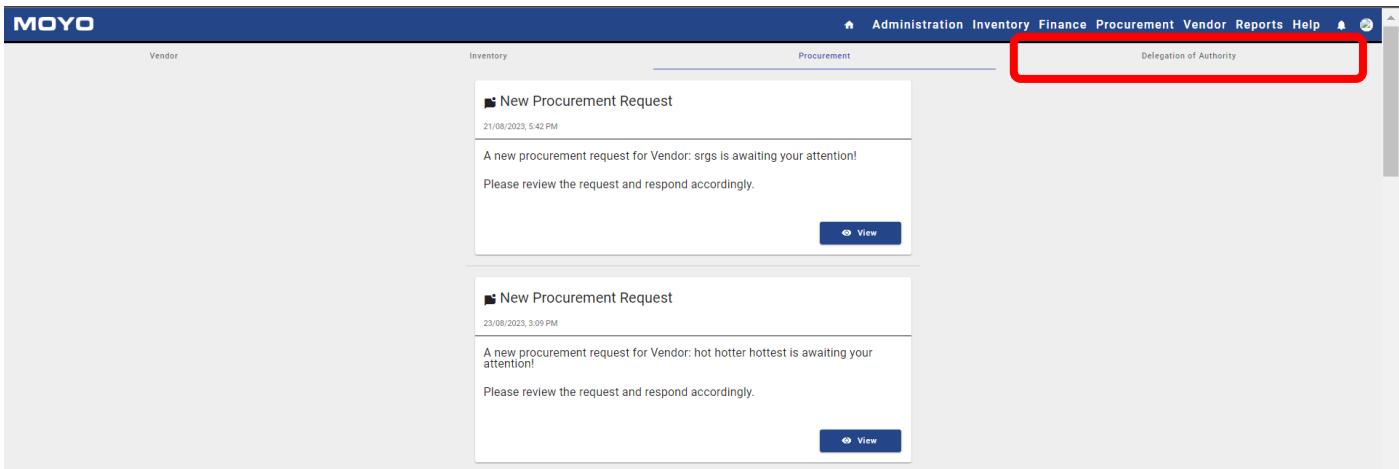


Figure 1 Delegation of Authority tab view

Then you click on the “View” button on the notification popup. This will navigate you to Delegation of Authority section part of the system that the notifications are about.

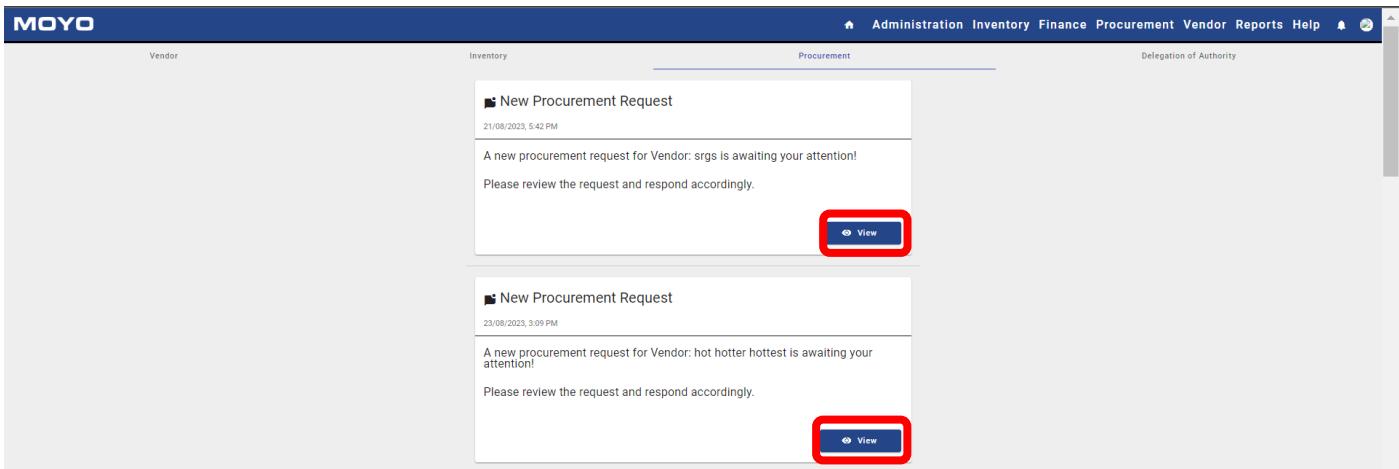


Figure 1 Click View Delegation of Authority Notification



# Account Section

## Account:

Profile, Edit Profile, Update Password, Logout, Login, Forgot Password:

Step 1 Navigate to Account screen:

Navigate to the Account Screen by clicking on the account Icon button on the top navbar:

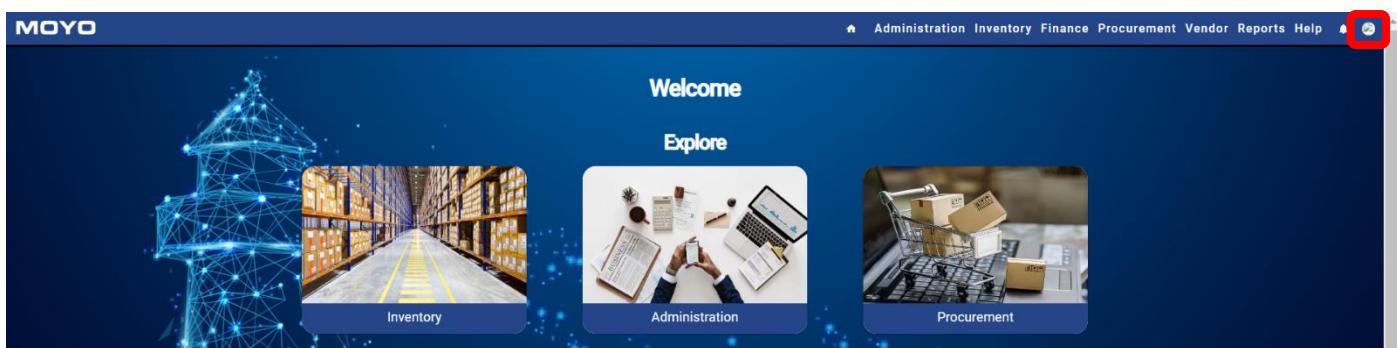


Figure 1 Home Screen to Account Screen

Step 2 Navigate to Profile screen:

The system will display a dropdown menu. Then Click on the “Profile” button.

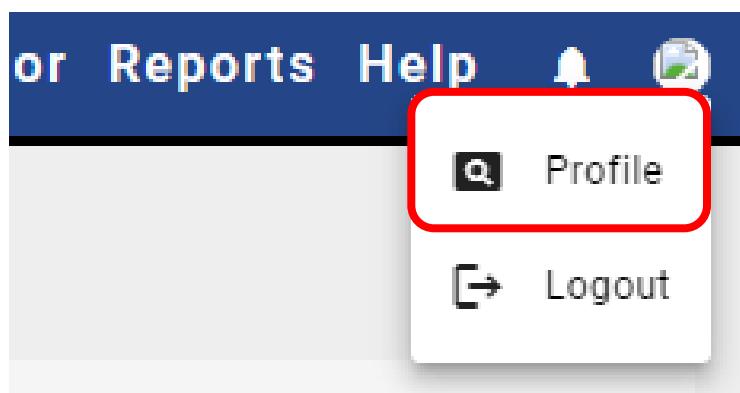


Figure 1 Account dropdown Click Profile Screen

This will navigate you to the Profile screen.



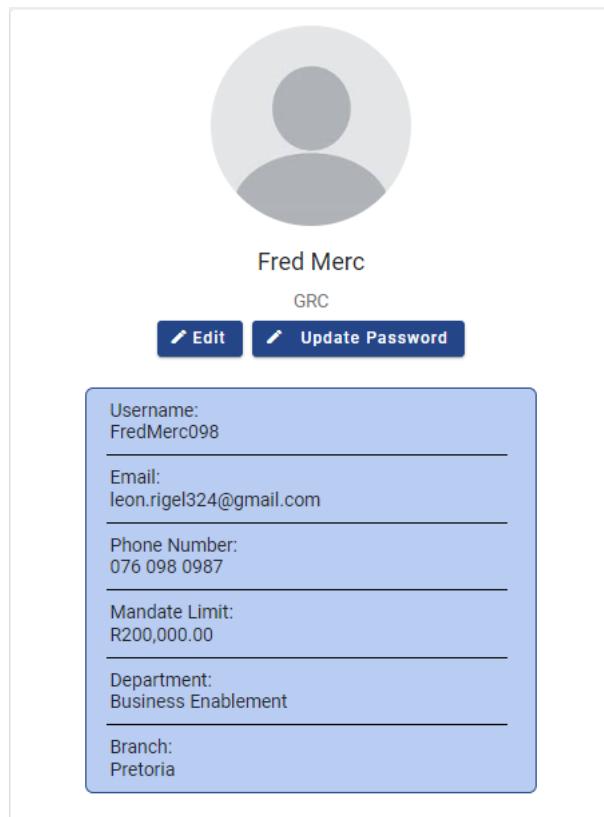


Figure 1 Edit profile Screen

### Step 3 Edit Profile:

Then Click on the “Edit” button on the Profile screen.



hello@moyoafrika.com



Building D, 242 on Jean Avenue, Centurion



+27 (0) 12 664 1392

**MOYO**

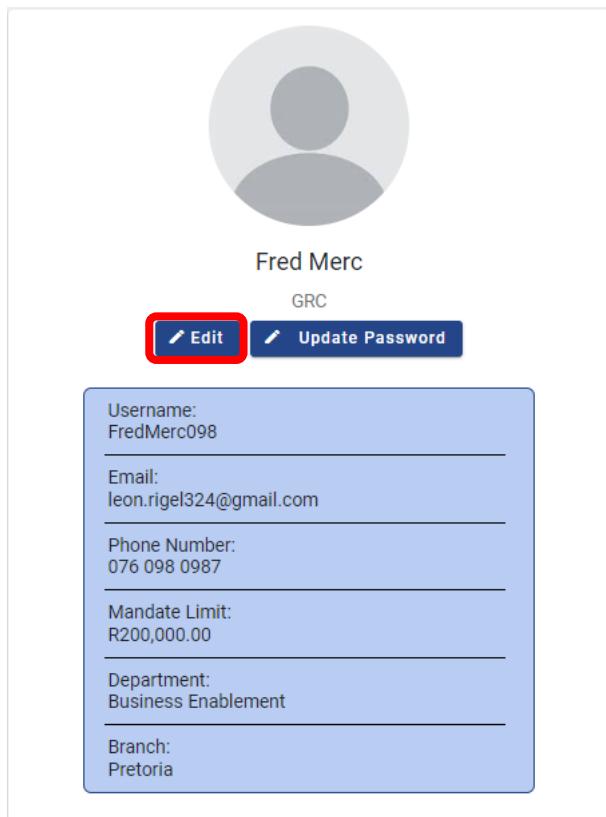


Figure 1 Edit profile Click Edit

This will navigate you to the Edit Profile Screen. There you will be able to edit your profile information. Once you are done editing click the “Save” button to edit you profile.(All field will be prefilled)



Figure 1 Click Save Edit Profile

1. **Name**: Change the Name on you profile. (Not Compulsory)
2. **Surname**: Change the Surname on you profile. (Not Compulsory)
3. **Email**: Change the Email on you profile. (Not Compulsory)
4. **Phone Number**: Change the Phone Number on you profile. (Not Compulsory)
5. **Profile Picture**: Click the pencil icon. This will allow you to choose a picture form you device. Once you have chosen a picture the system will display a filet picture border screen. Click “Save” to save the profile picture. (Not Compulsory)



Figure 1 Click Save Profile Picture screen.

## Step 4 Update Password:

Then Click on the “Update Password” button on the Profile screen.

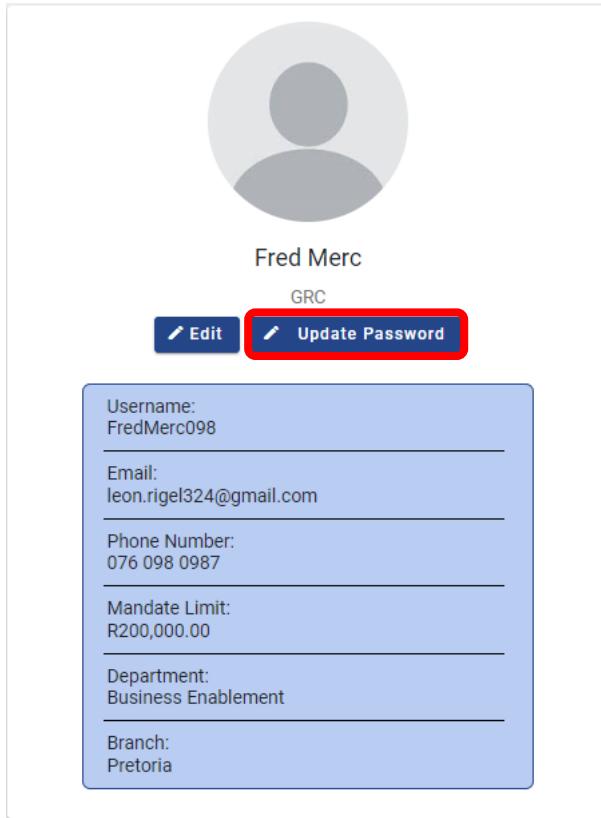


Figure 1 Click Update Password Edit profile Screen

This will navigate you to the Update Password Profile Screen. There you will be able to Update your profile password. Once you are done updating click the “Submit” button to update your Password. (Once you password is change you will be logged-out of the system)



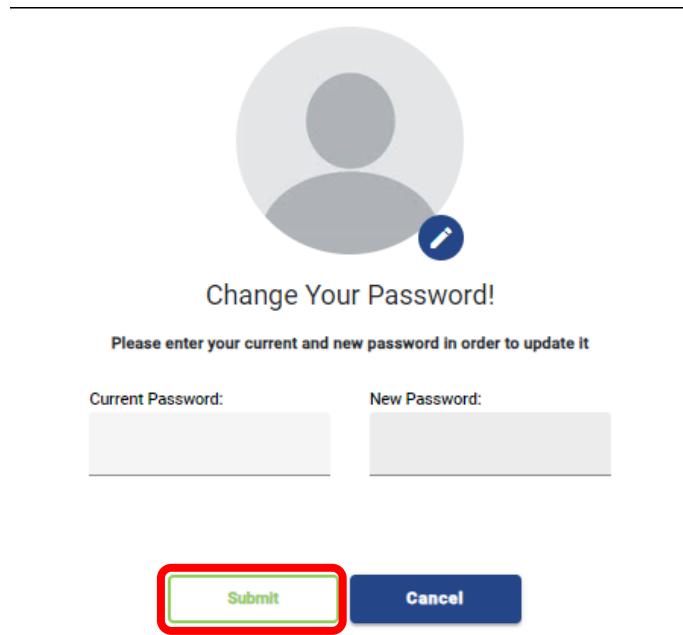


Figure 1 Click Submit Update Password

1. **“Current Password”:** Fill in your current password for verification. (Compulsory)
2. **“New Password”:** Fill in your new updated password. (Compulsory)

## Step 5 Logout:

Then Click on the account icon button on the top navbar then on the “Logout” button on the dropdown. This will log you out of the system.

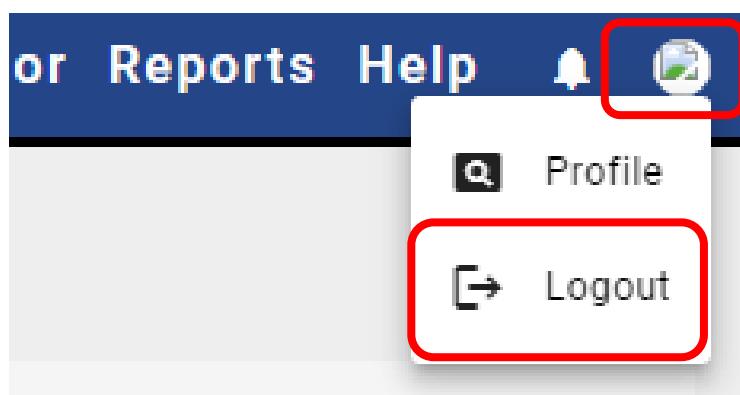


Figure 1 Click Logout Button



## Step 6 Login:

On the login Screen Click the “login” button. This will log you into the system.

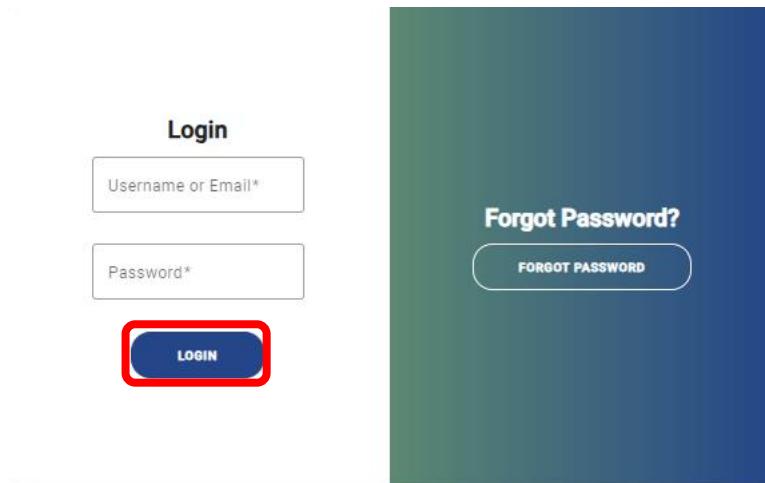


Figure 1 Click Login Button

1. **Username or Email**: Fill in the username or email of your profile. (Compulsory)
2. **Password**: Fill in the password of your profile. (Compulsory)

## Step 7 Forgot Password:

On the login Screen Click the “Forgot Password” button.

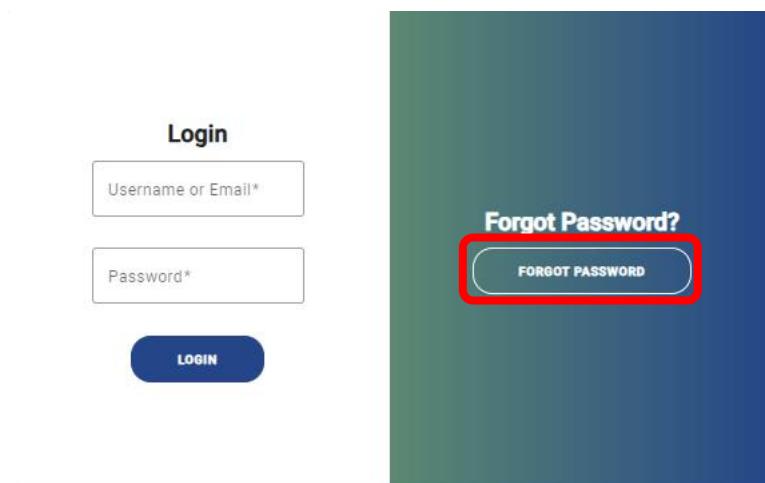


Figure 1 Click Forgot Password Button



This will navigate you to the Forgot Password screen. Then Click on the “Reset Passowrd” button. This will reset your password.

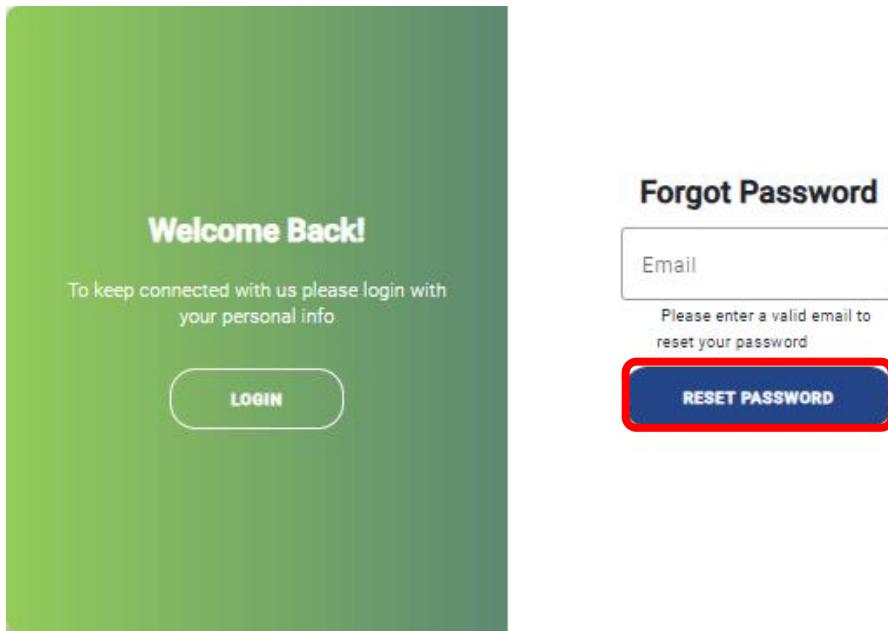


Figure 1 Click Reset Password Button

1. Email: Fill in the email of your profile. (Compulsory)