MOYO

Driving Significance Together

# User Manual

## PROCION SYSTEM ONLINE

Date: 8TH Month 2023

Submitted by: MOYO

Prepared by Leon Combrinck

# Table of Contents

# 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:**

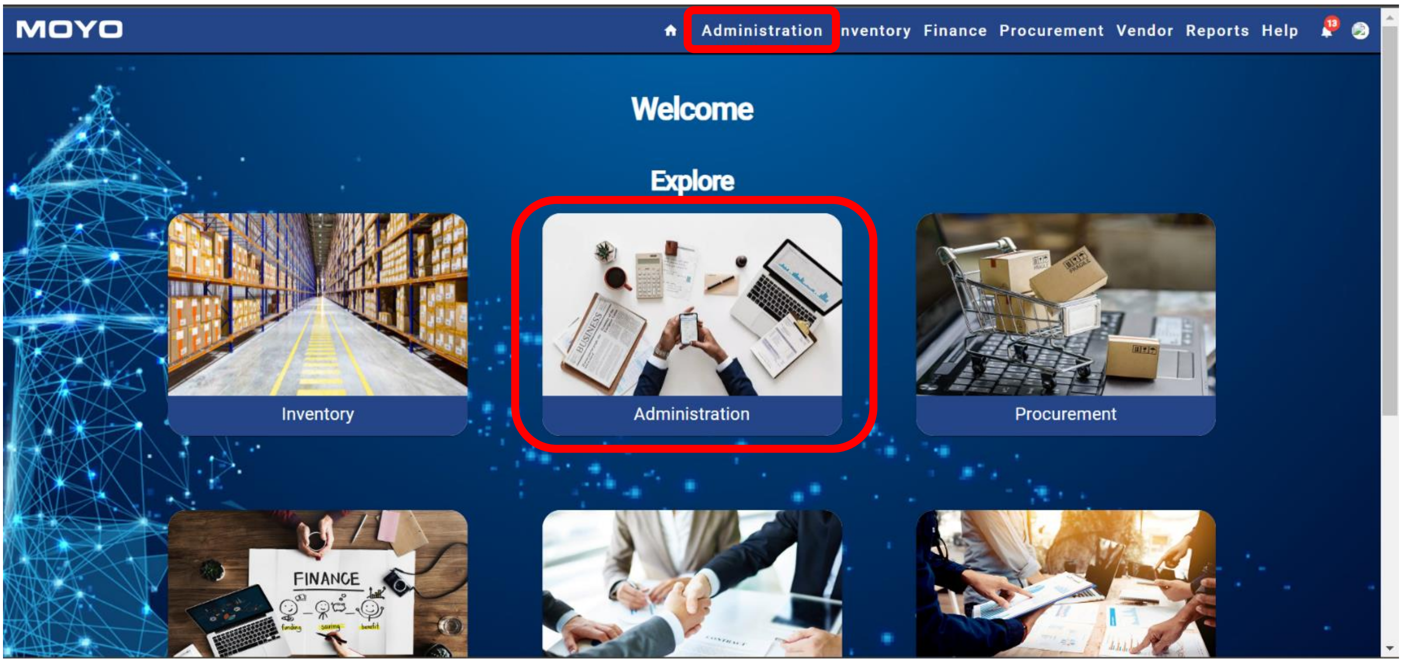


Figure 1 Home Screen to Employee Screen.

**Then Click on the "Employee" button on the administration side navbar:**

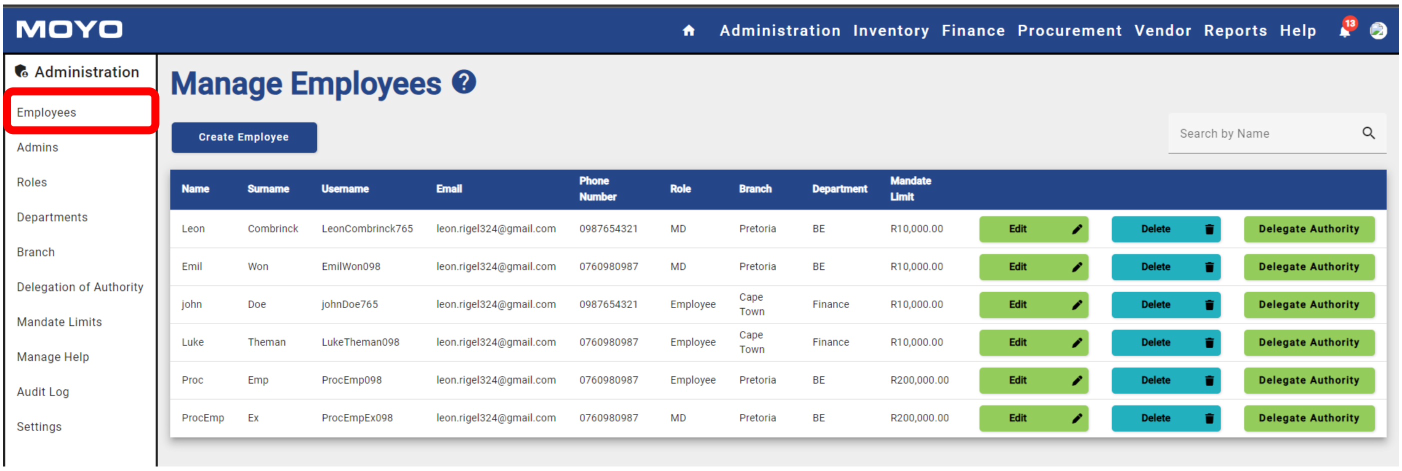


Figure 1 Admin Side Nav to Employee Screen.

## Step 2 Create Employee:

**Create a new employee by clicking on the "Create Employee" button on the employee screen:**

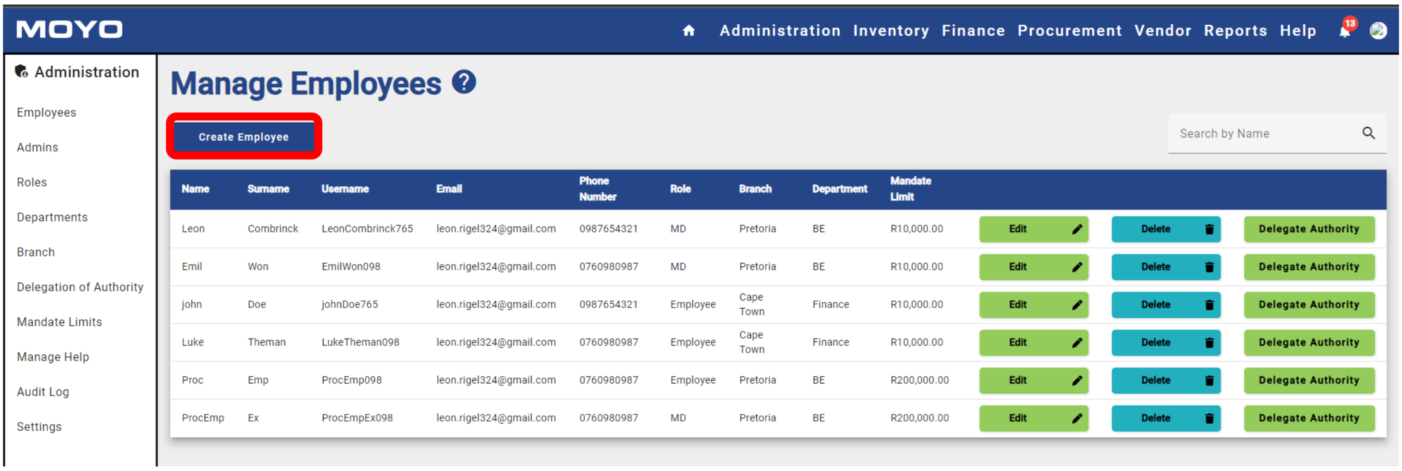


Figure 1 Click Create Employee Button.

**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)**

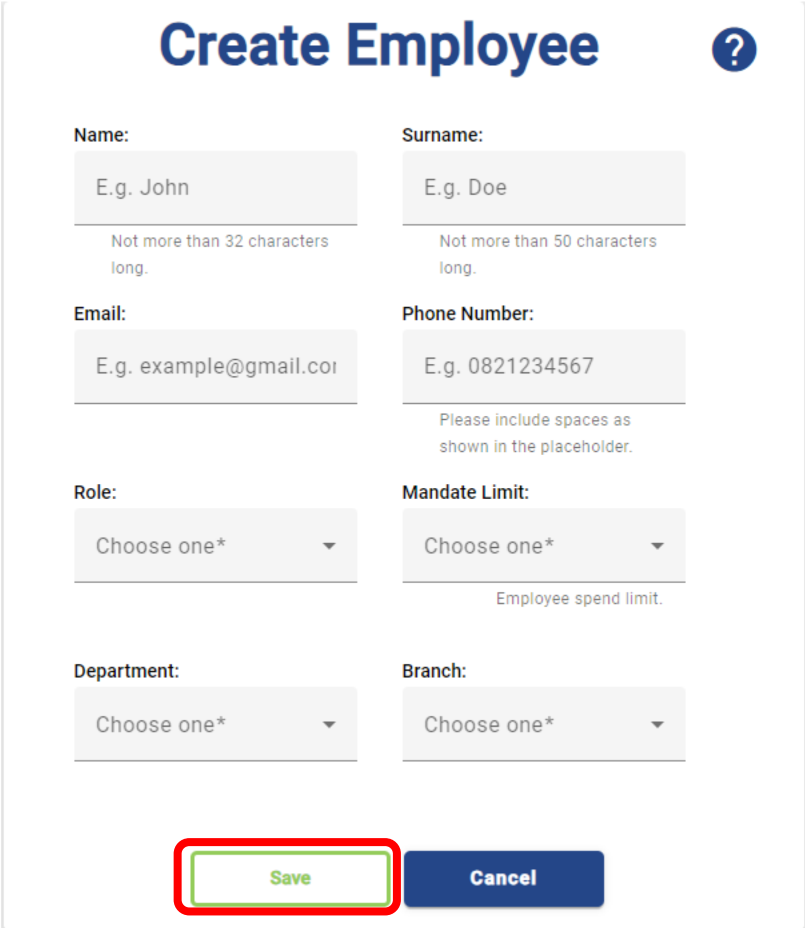


Figure 1 Click Save Create Employee Button.

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": Chose a role for the employee from the list existing roles on the system.
6. "Mandate Limit": Chose a mandate limit for the employee from the list existing mandate limits on the system.
7. "Department": Chose a department for the employee from the list existing departments on the system.
8. "Branch": Chose a Branch for the employee from the list existing Branches on the system.

## 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)**

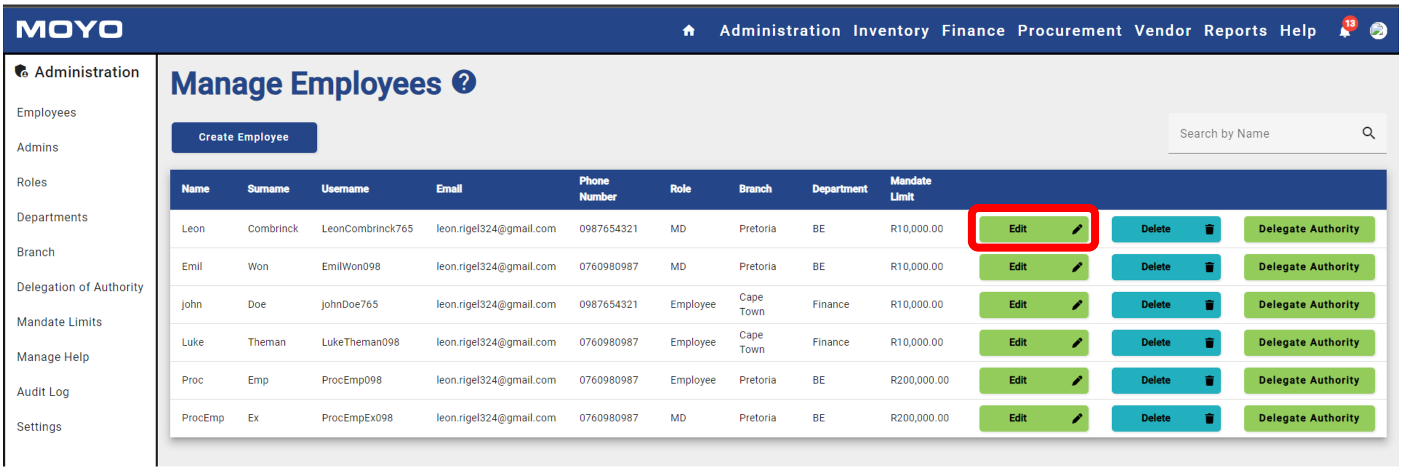


Figure 1 Click Edit Employee Button.

**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)**

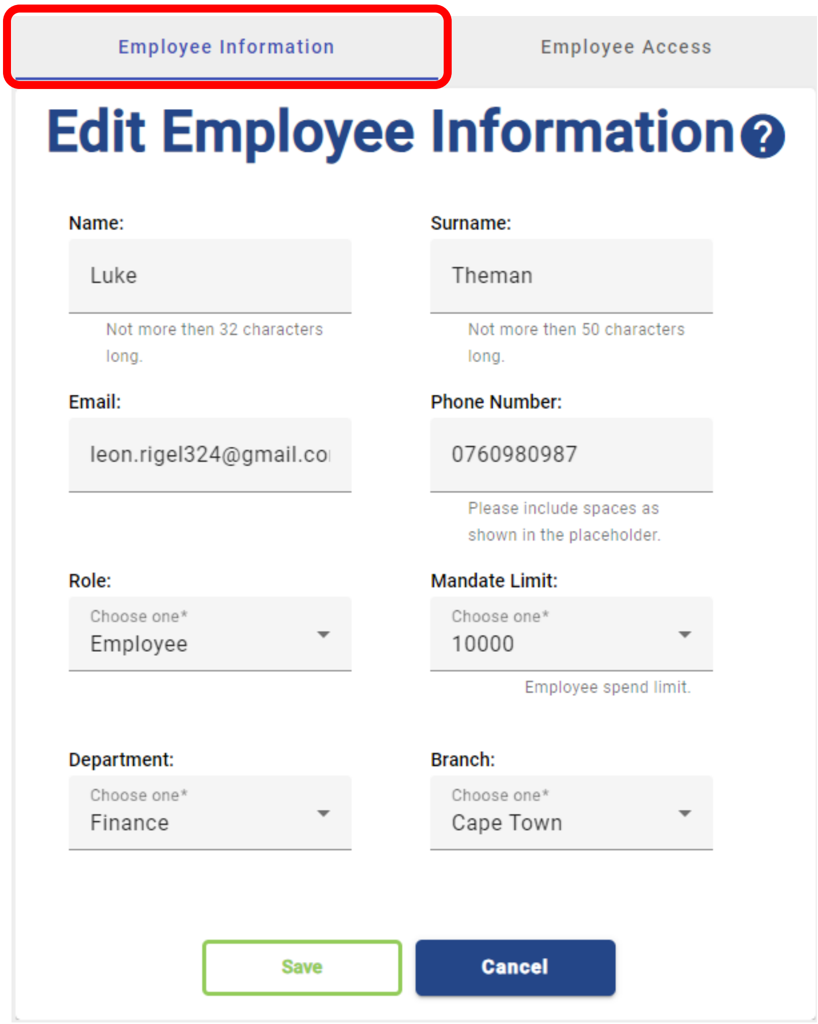


Figure 1 Click Employee Information Tab.

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)

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

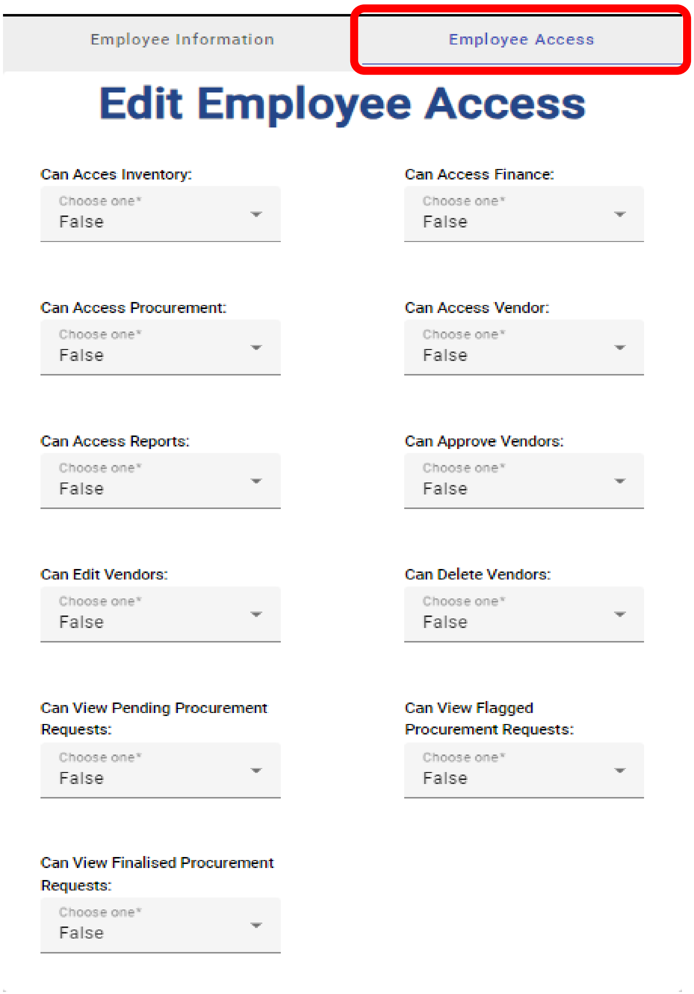


Figure 1 Click Employee Access Tab.

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.**

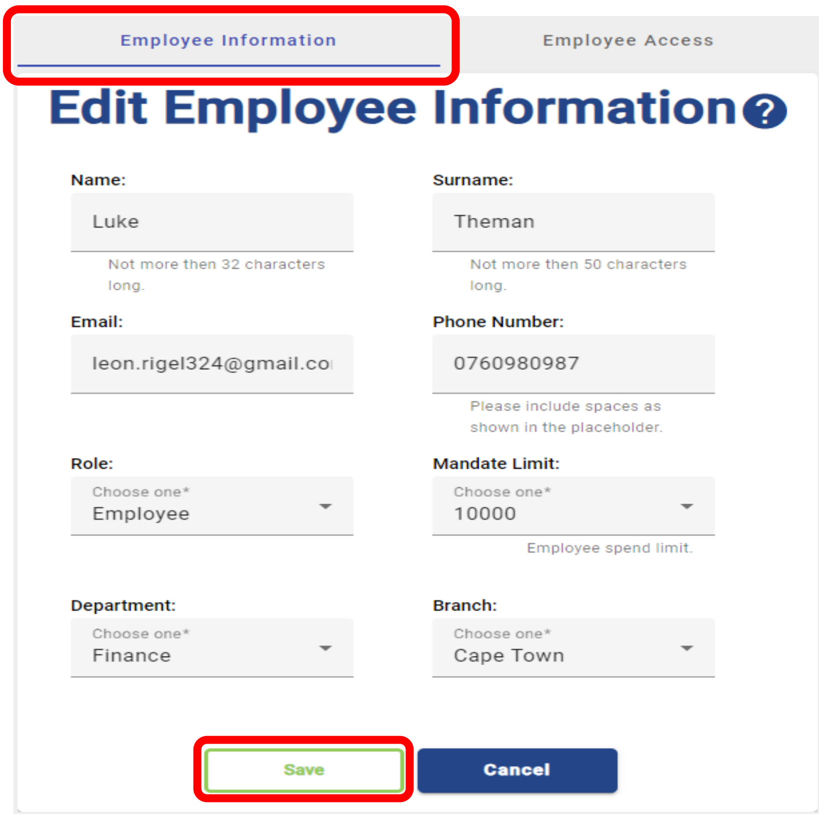


Figure 1 Click Save Edit Employee Button.

## 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)**

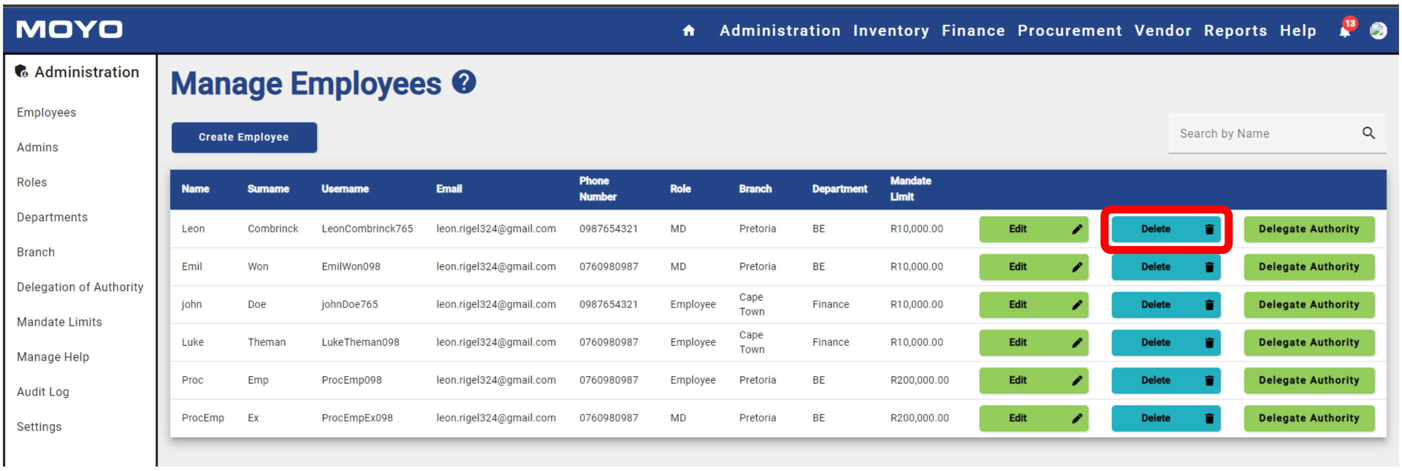


Figure 1 Click Delete Employee Button

**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.**

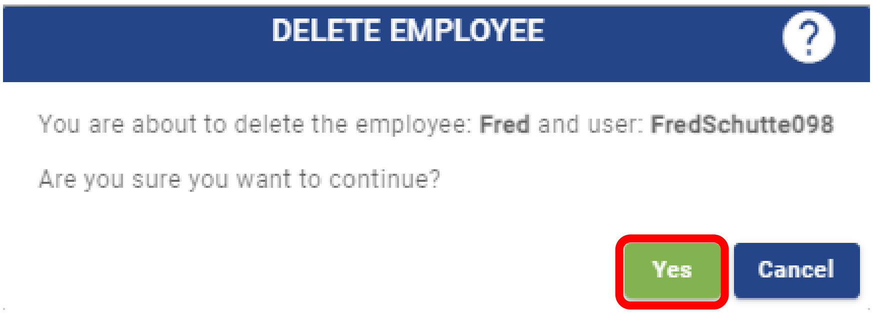


Figure 1 Click Yes Delete Employee Button

## 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)**

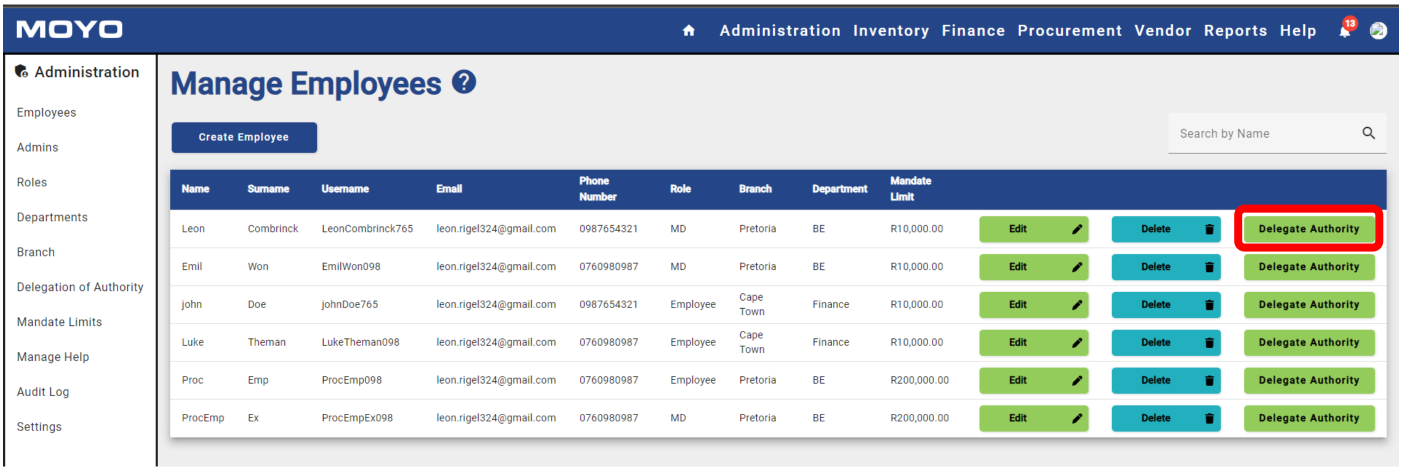


Figure 1 Click Delegate Authority Button

**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.**

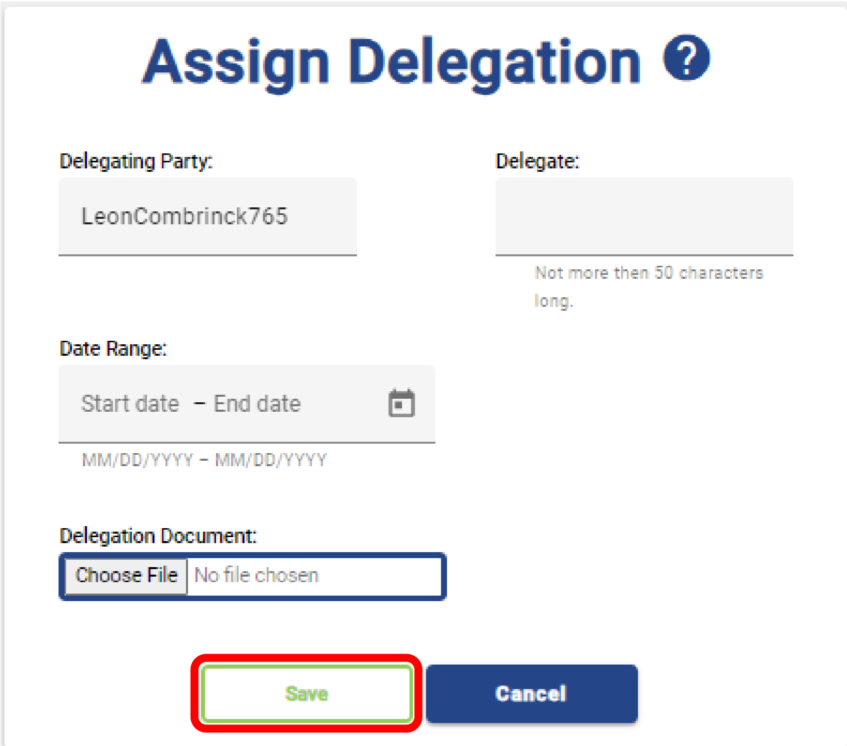


Figure 1 Click Save Delegate Employee Button

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)

# 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:**

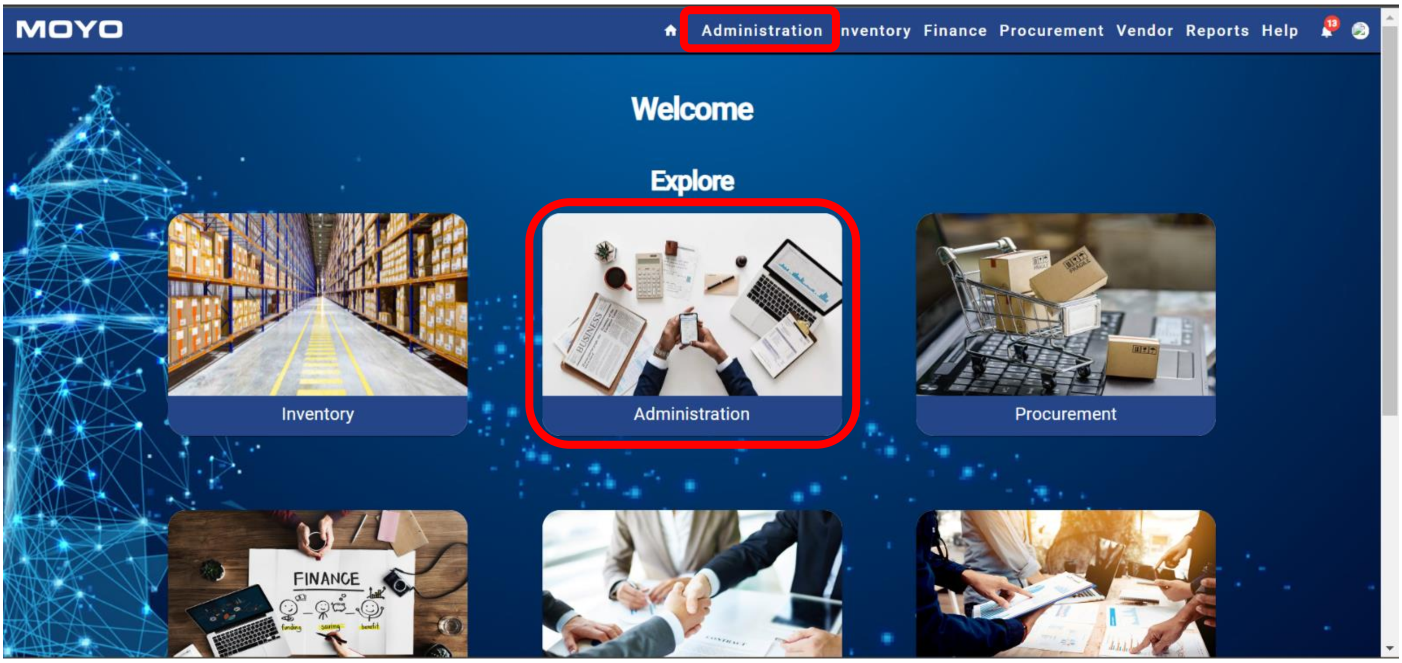


Figure 1 Home Screen to Admin Screen

**Then Click on the "Admin" button on the administration side navbar:**

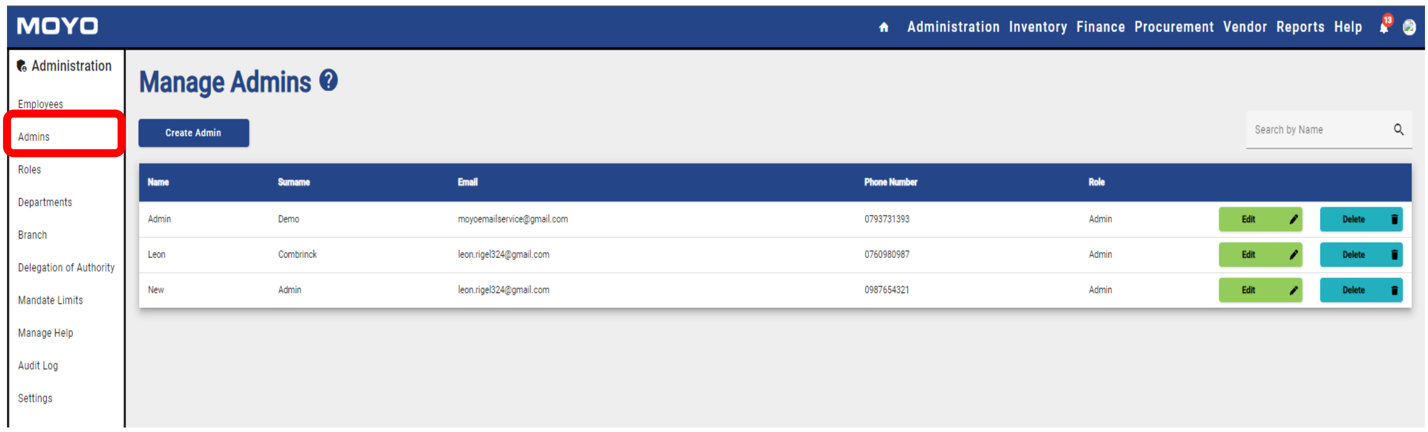


Figure 1 Administration side nav to Admin Screen

## Step 2 Create Admin:

**Create a new admin by clicking on the "Create Admin" button on the admin screen:**

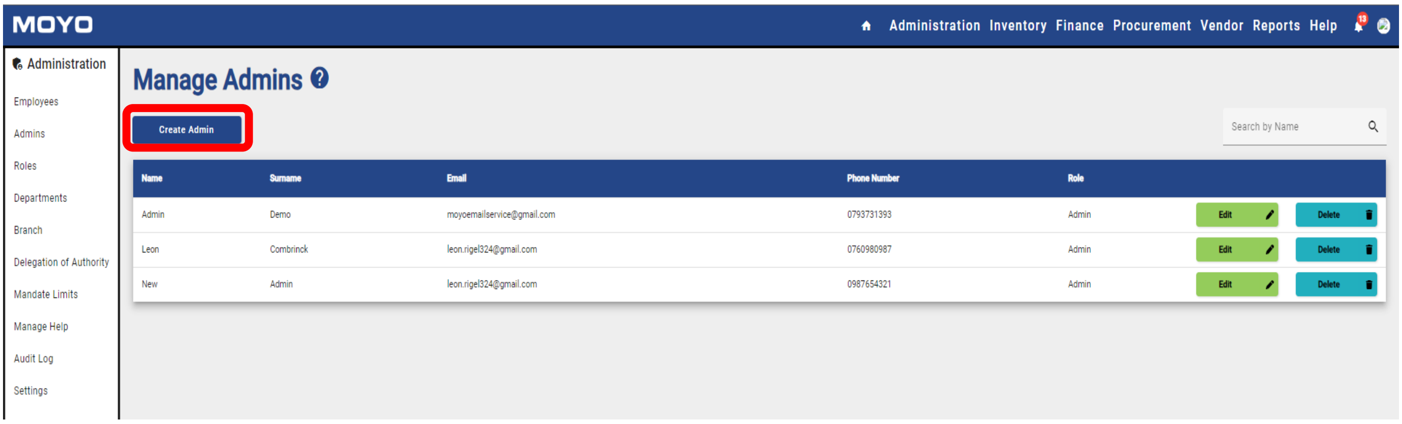


Figure 1 Click Create Admin Button

**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.**

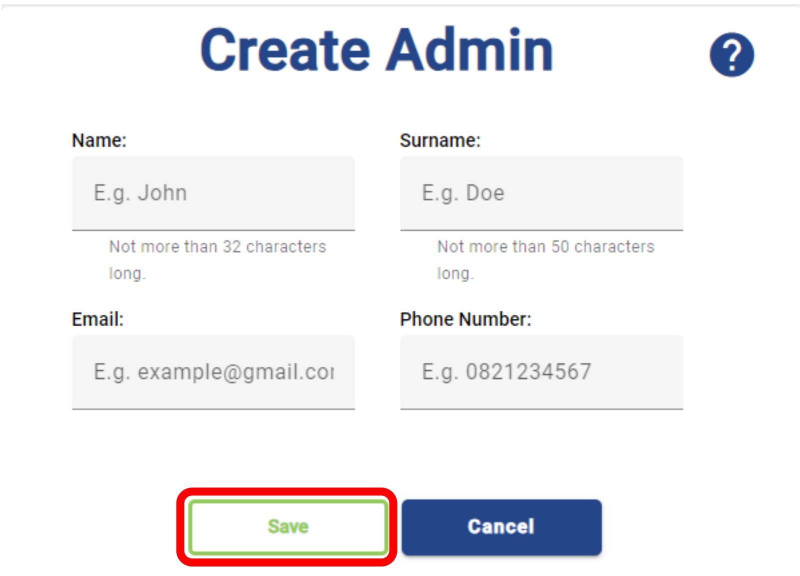


Figure 1 Click Save Create Admin Button

1. "Name": Fill in the name of the admin. (Compulsory)
2. "Surname": Fill in the surname of the admin. (Compulsory)
3. "Email": Fill in the email of the admin. (Compulsory)
4. "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)**

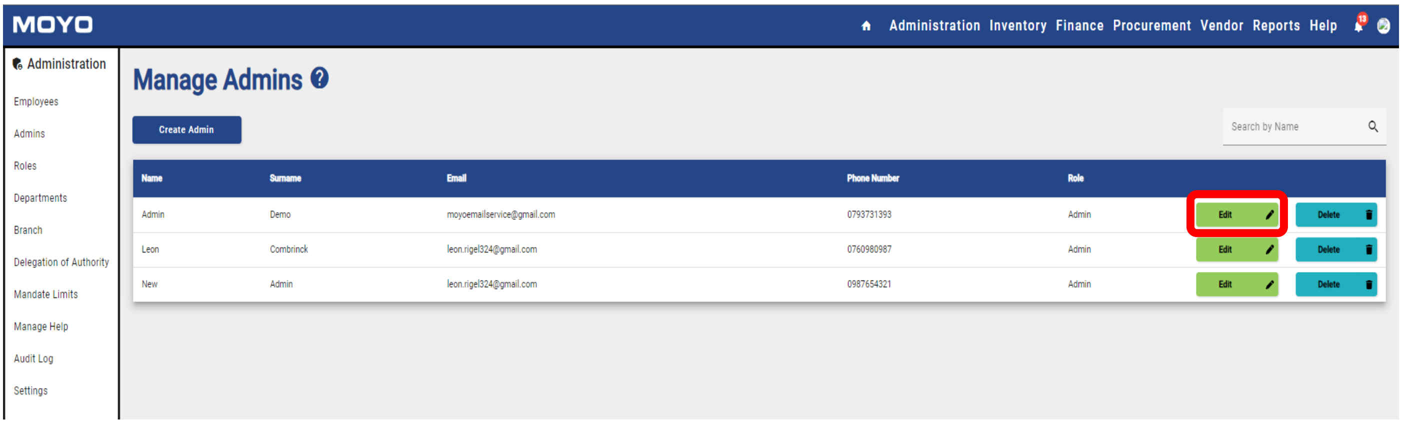


Figure 1 Click Edit Admin Button.

**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)**

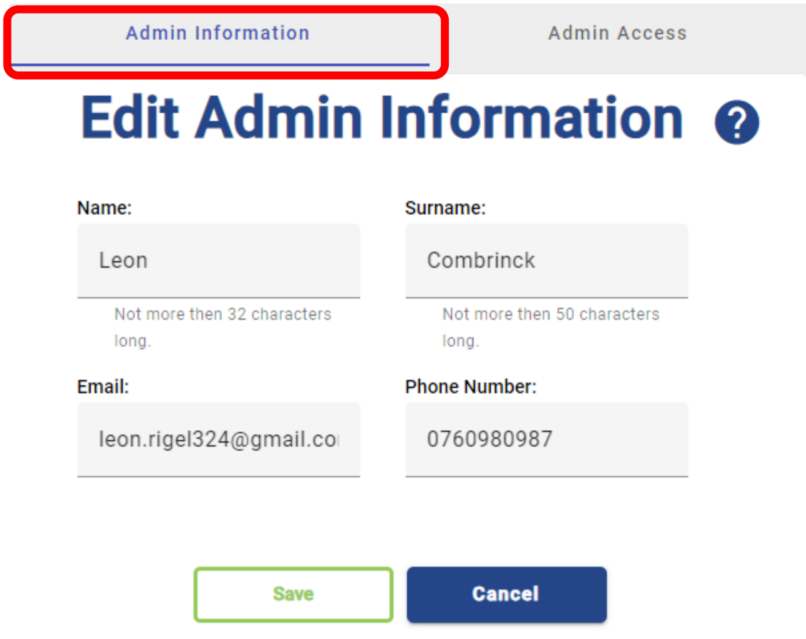


Figure 1 Click Admin Information tab.

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)**

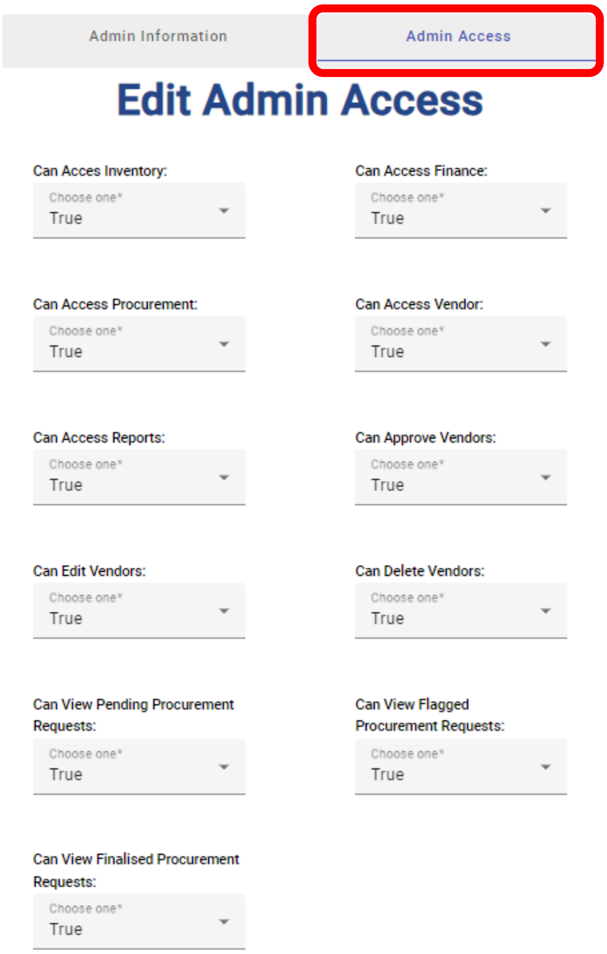


Figure 1 Click Admin Access Tab.

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.**

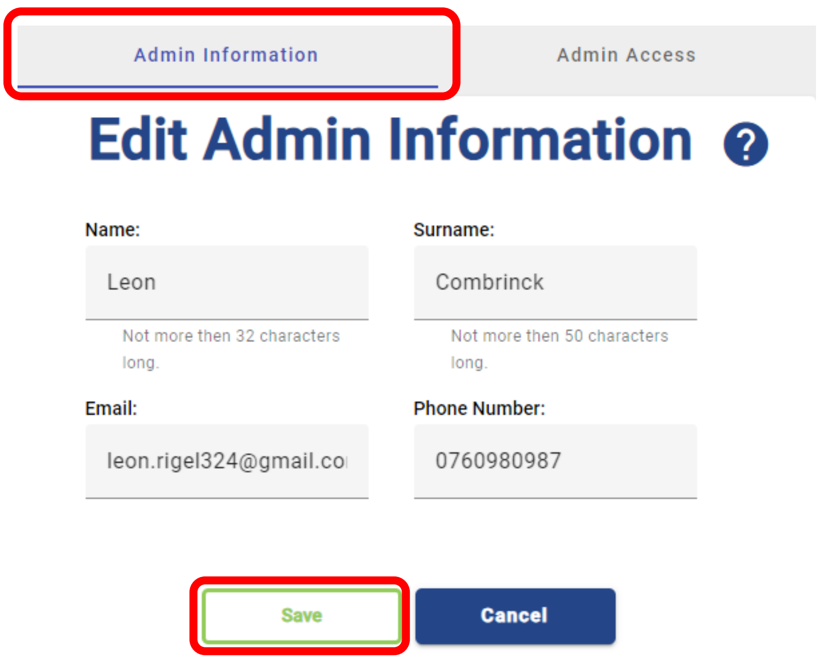


Figure 1 Click Save Edit Admin Button.

## 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)**

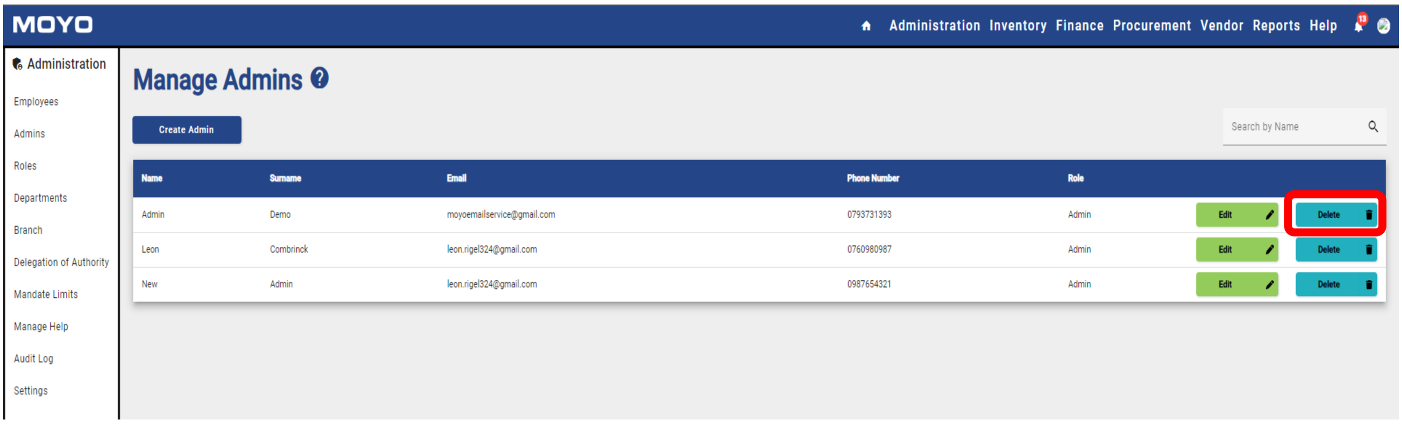


Figure 1 Click Delete Admin Button

**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.**

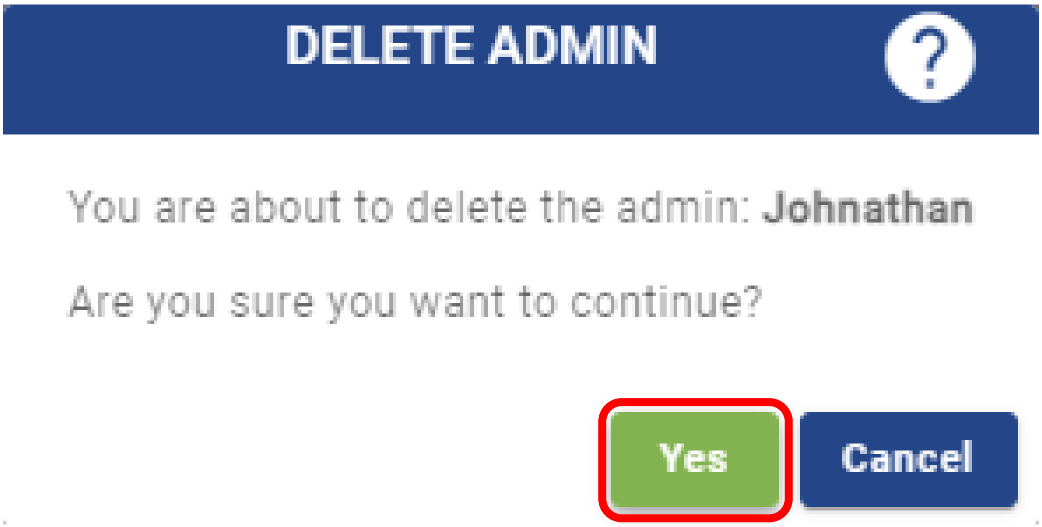


Figure 1 Click Yes Delete Admin Button

# 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:**

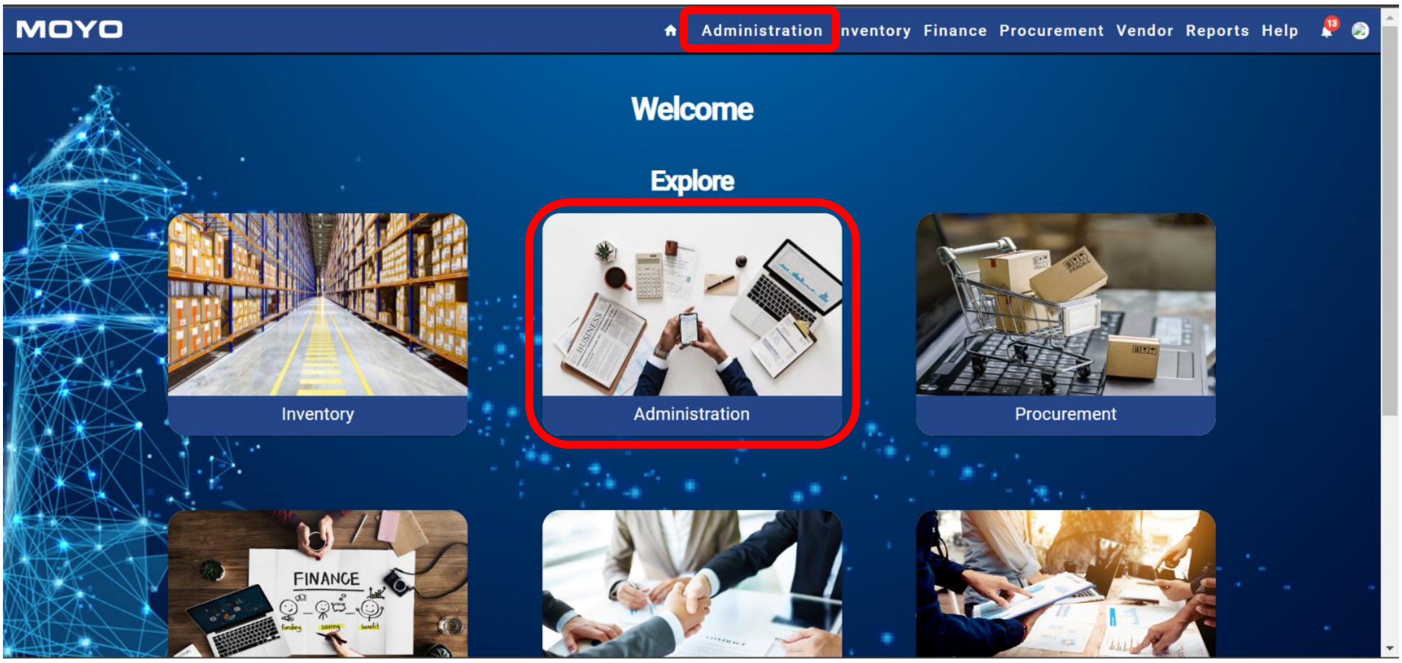


Figure 1 Home Screen to Employee Role Screen

**Then Click on the "Roles" button on the administration side navbar:**

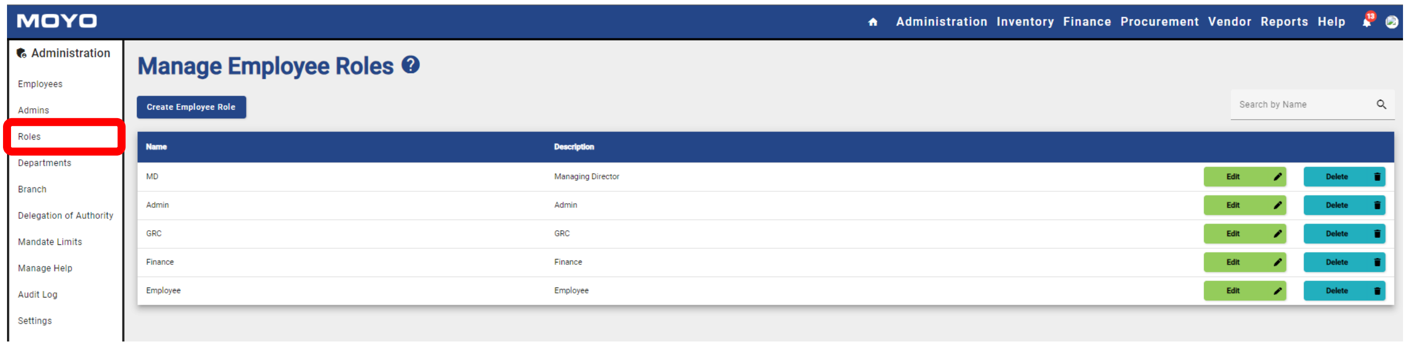


Figure 1 Administration side nav to Employee Role Screen

## Step 2 Create Employee Role:

**Create a new employee role by clicking on the "Create Employee Role" button on the Employee Role screen:**

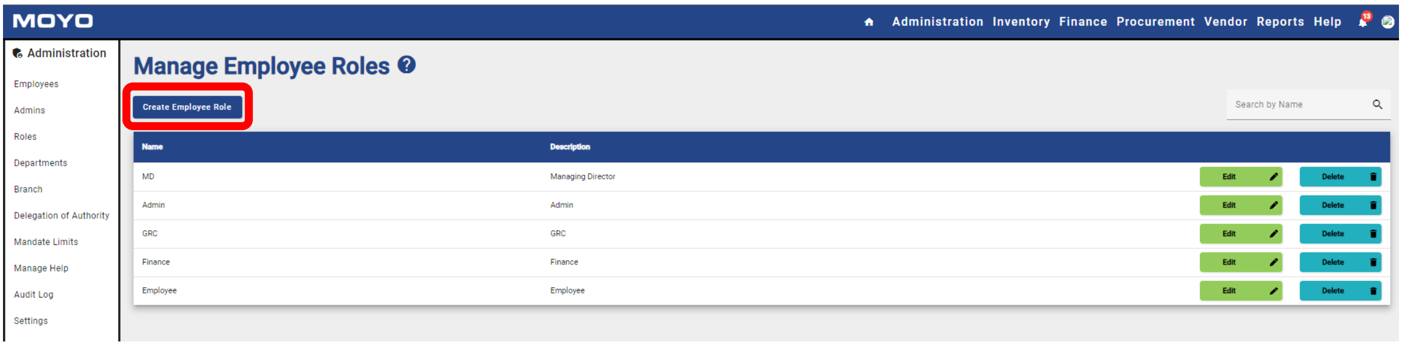


Figure 1 Click Create Employee Role Button

**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.**

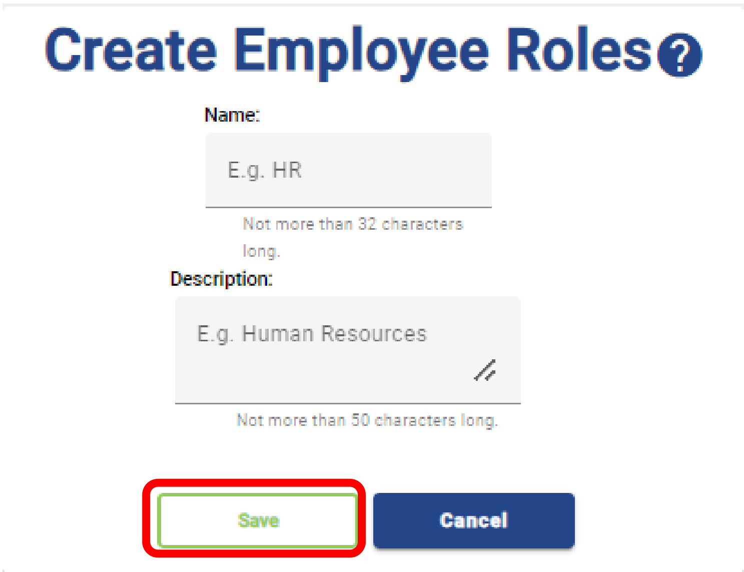


Figure 1 Click Save Create Employee Role Button

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)**

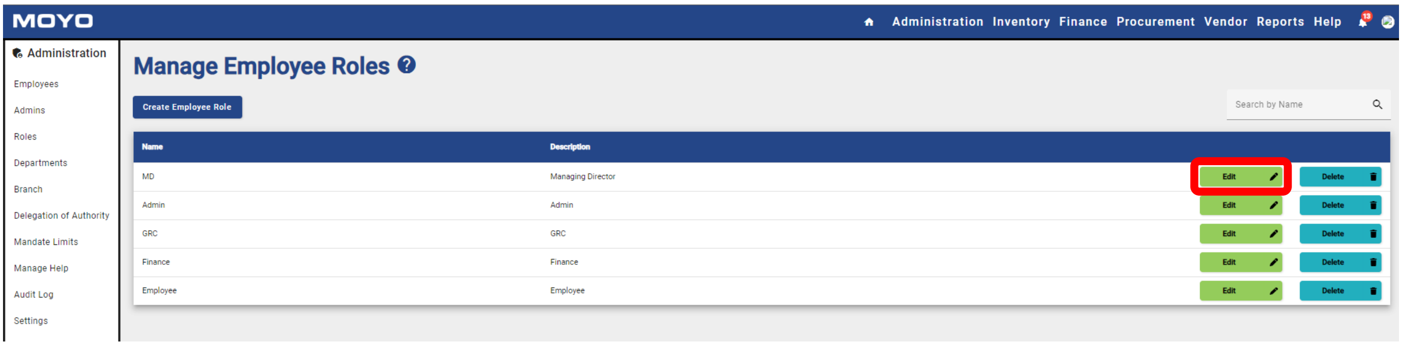


Figure 1 Click Edit Employee Role Button.

**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)**

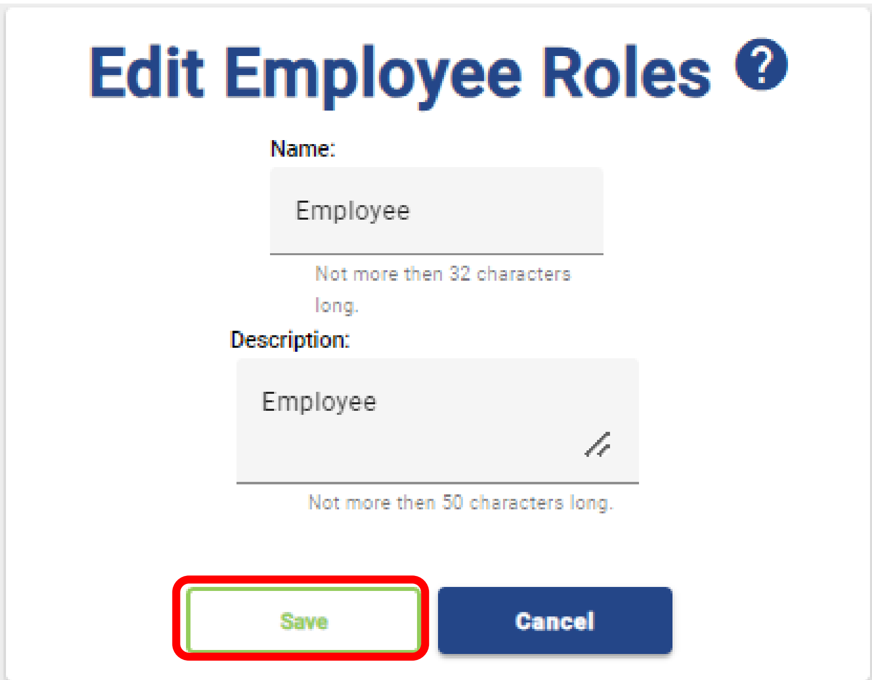


Figure 1 Click Save Edit Employee Role Button.

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)**

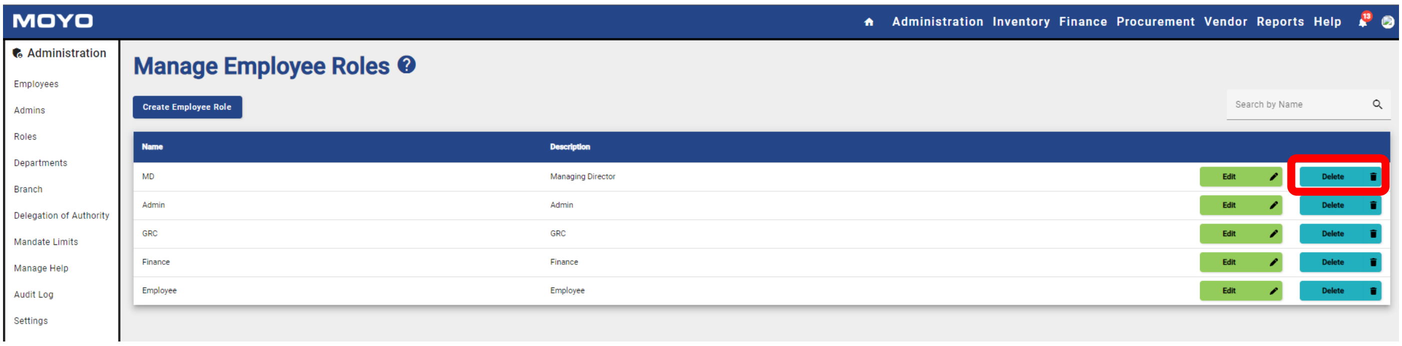


Figure 1 Click Delete Employee Role Button

**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.**

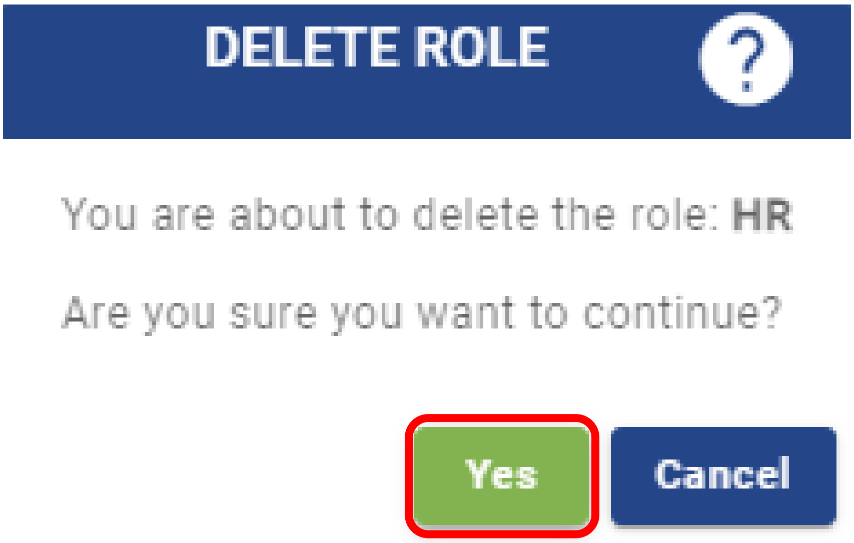


Figure 1 Click Yes Delete Employee Role Button

# 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:**

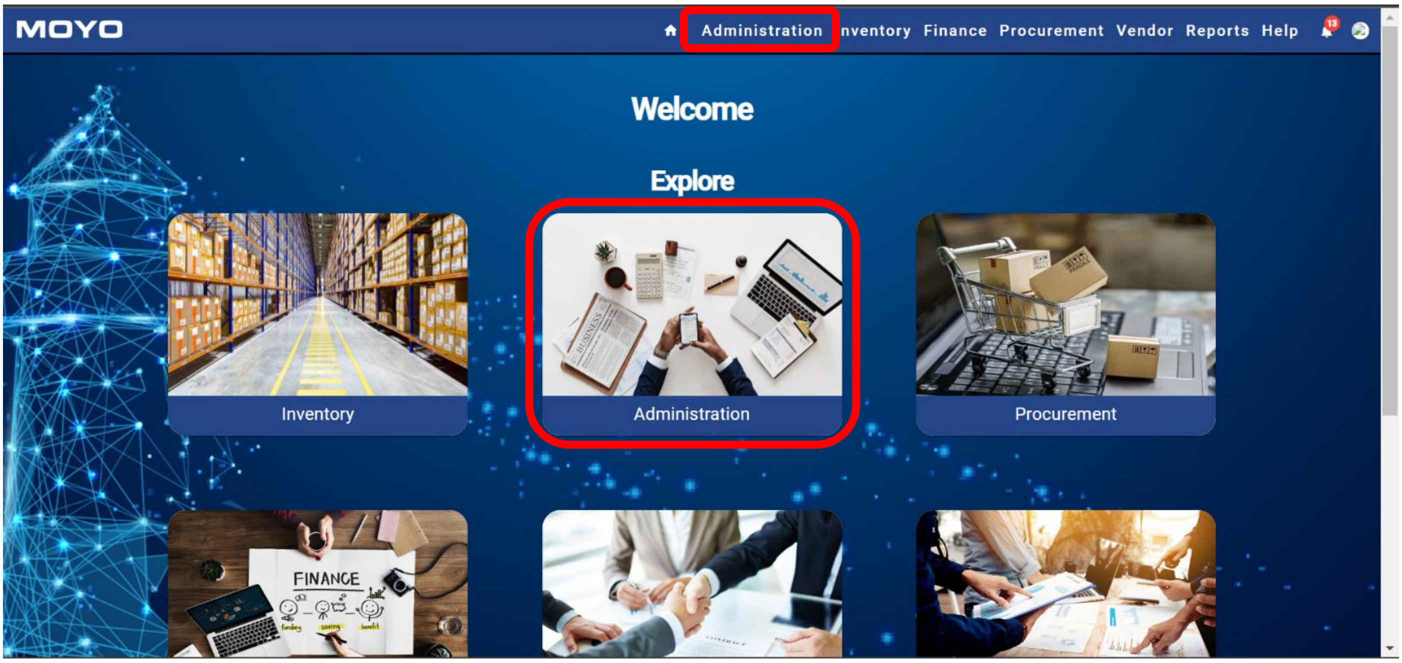


Figure 1 Home Screen to Department Screen

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

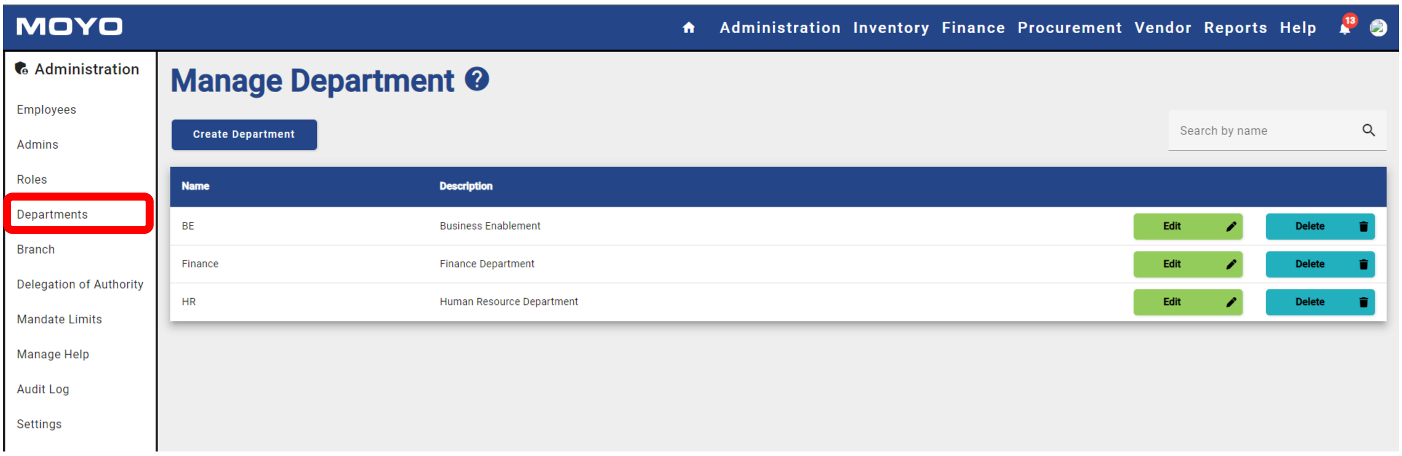


Figure 1 Administration side nav to Department Screen

## Step 2 Create Department:

**Create a new department by clicking on the "Create Department" button on the Department screen:**

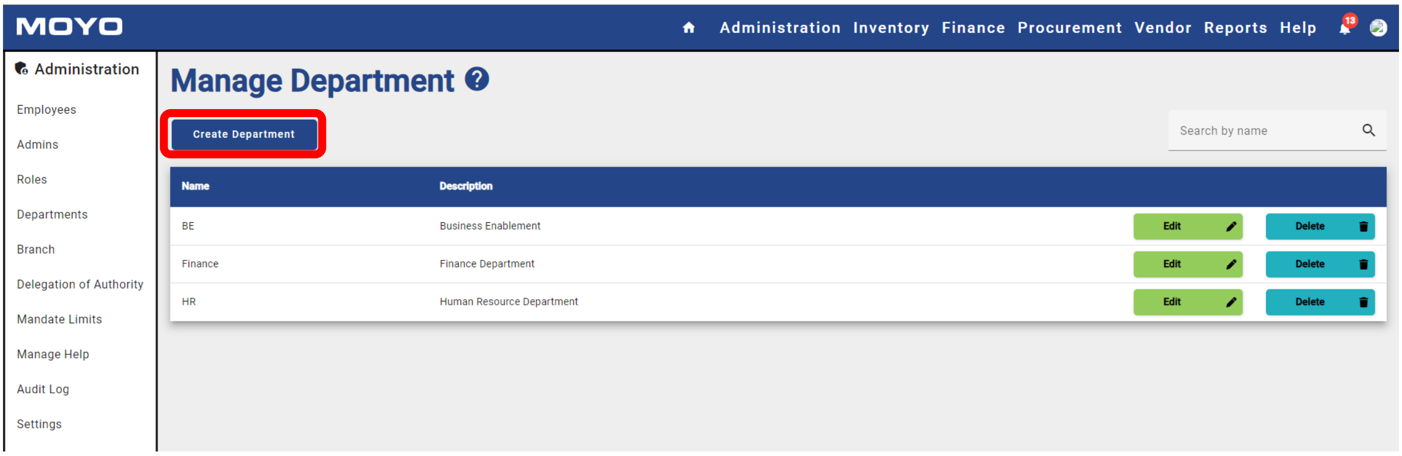


Figure 1 Click Create Department Button

**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.**


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)**

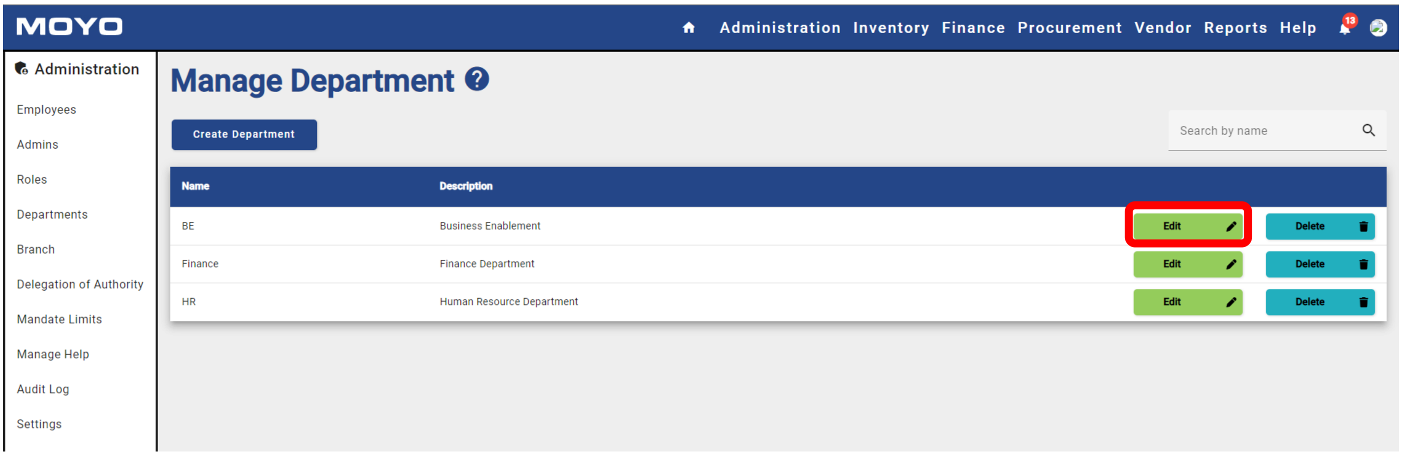


Figure 1 Click Edit Department Button.

**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)**

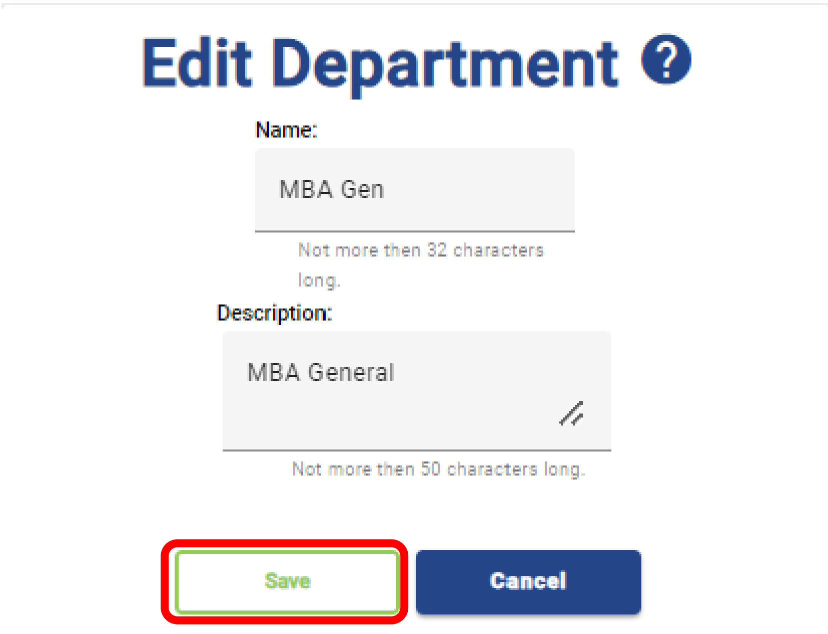


Figure 1 Click Save Edit Department Button.

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)**

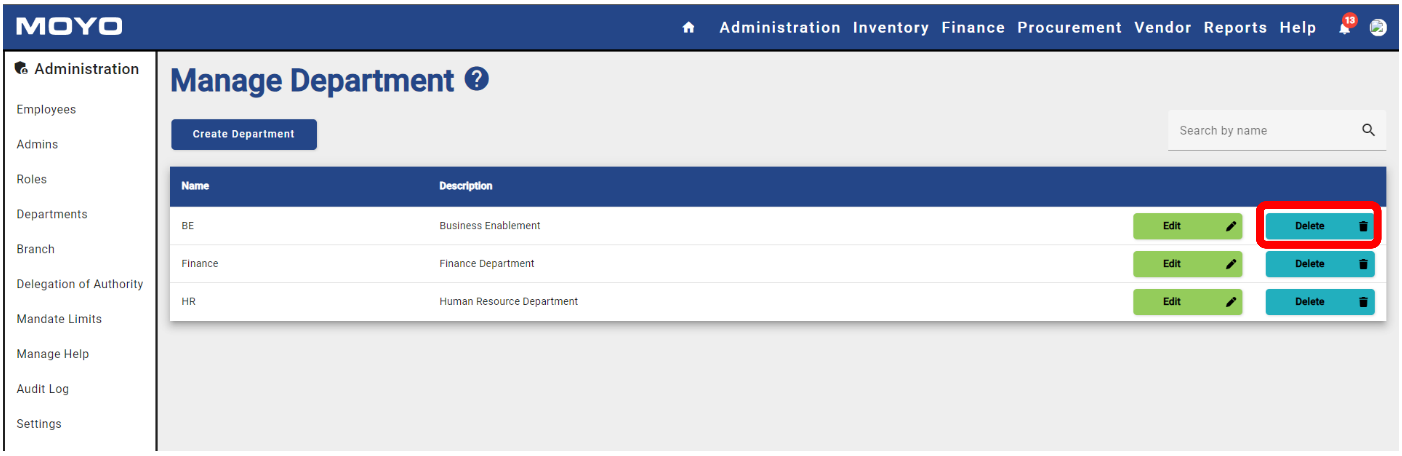


Figure 1 Click Delete Department Button

**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.**

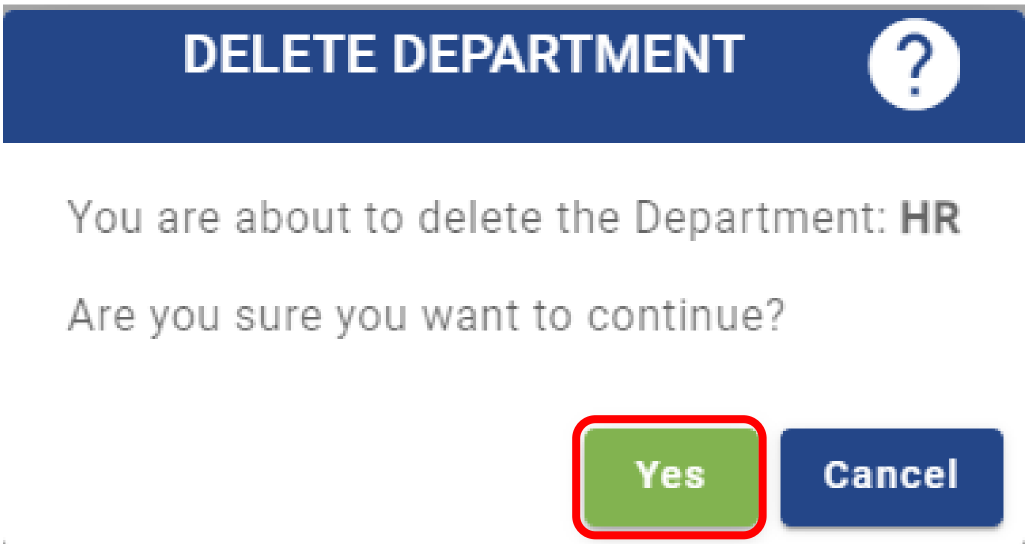


Figure 1 Click Yes Delete Department Button

# 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:**

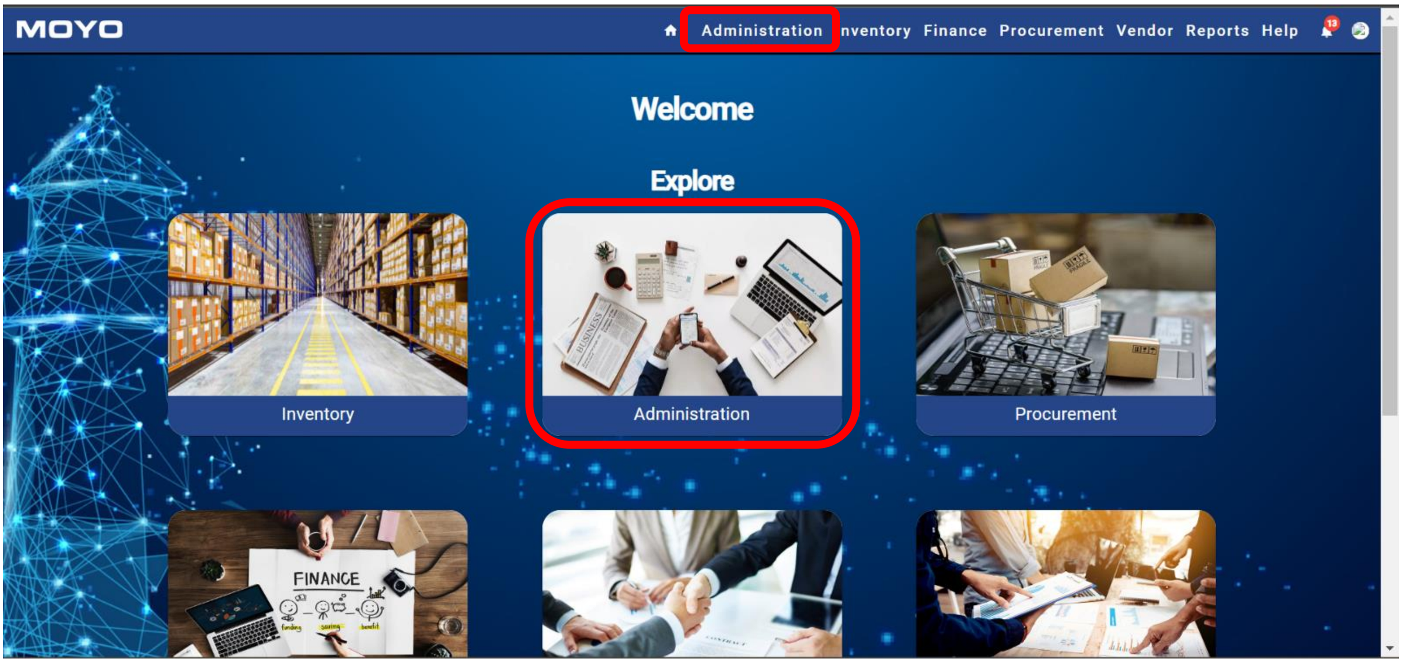


Figure 1 Home Screen to Branch Screen

**Then Click on the "Branch" button on the administration side navbar:**

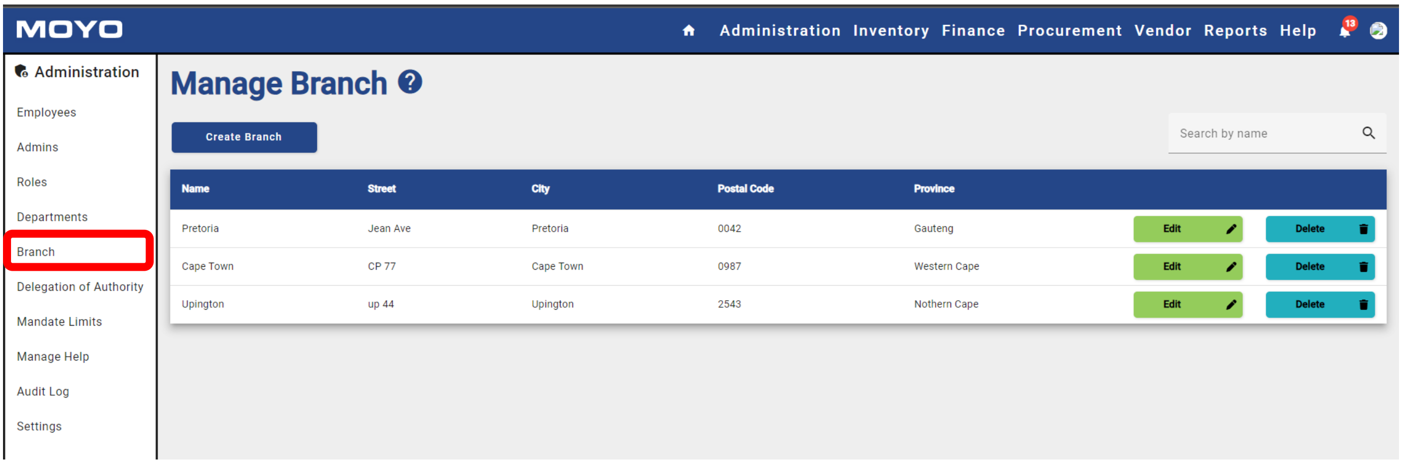


Figure 1 Administration side nav to Branch Screen

## Step 2 Create Branch:

**Create a new branch by clicking on the "Create Branch" button on the Branch screen:**

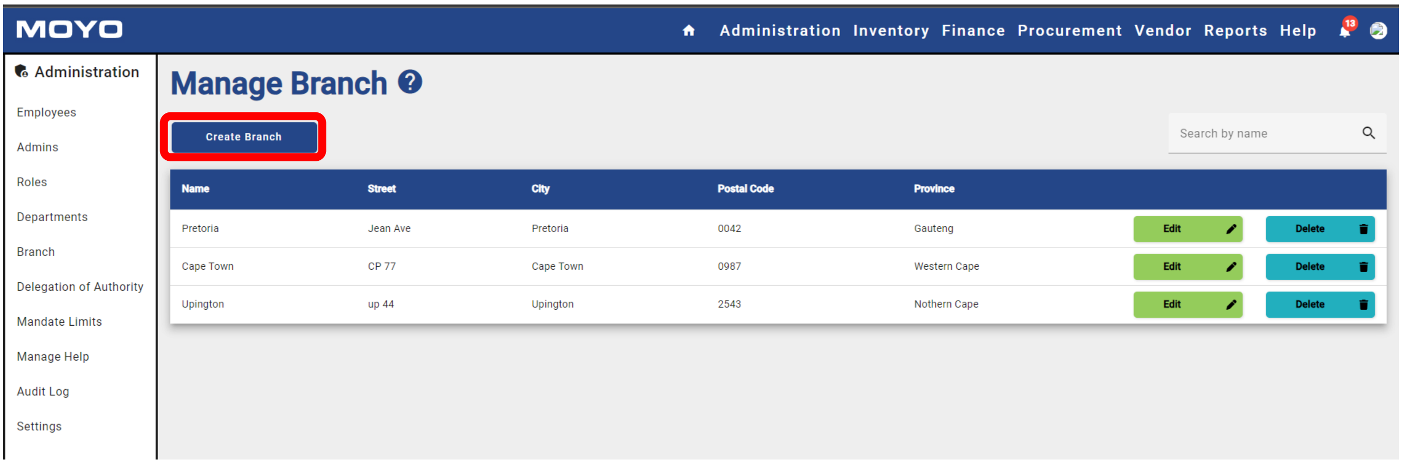


Figure 1 Click Create Branch Button

**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.**

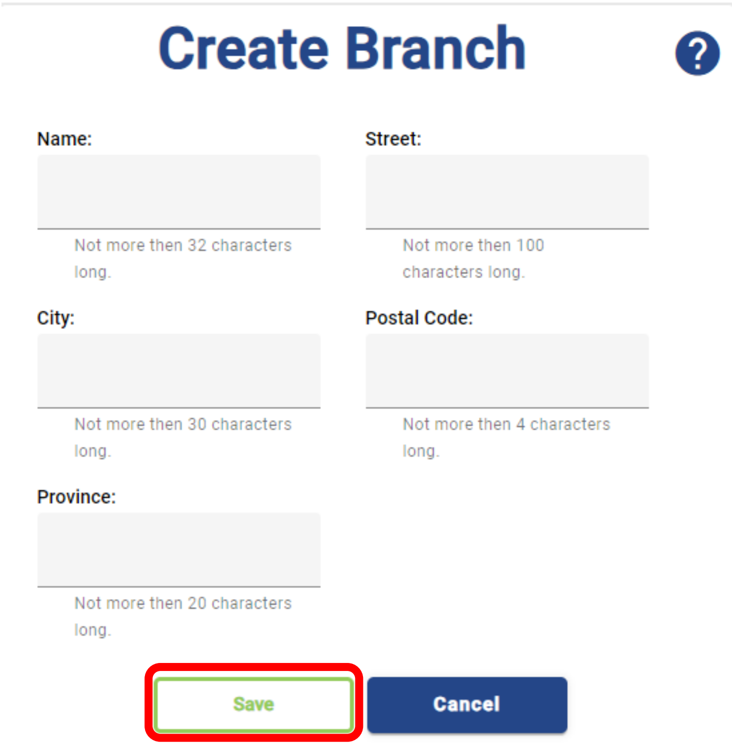


Figure 1 Click Save Create Branch Button

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)**

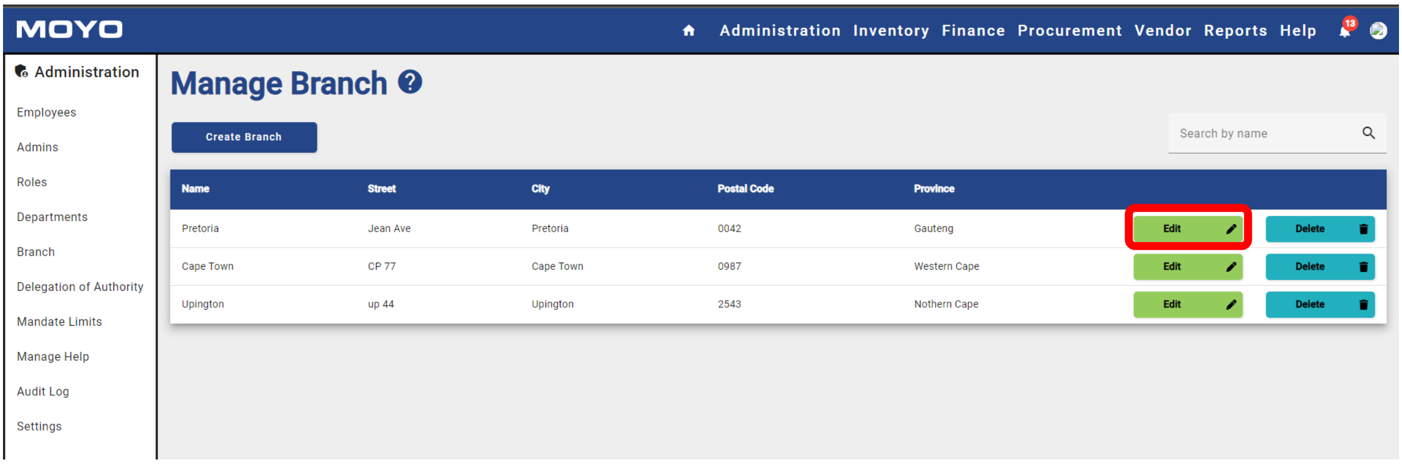


Figure 1 Click Edit Branch Button.

**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)**

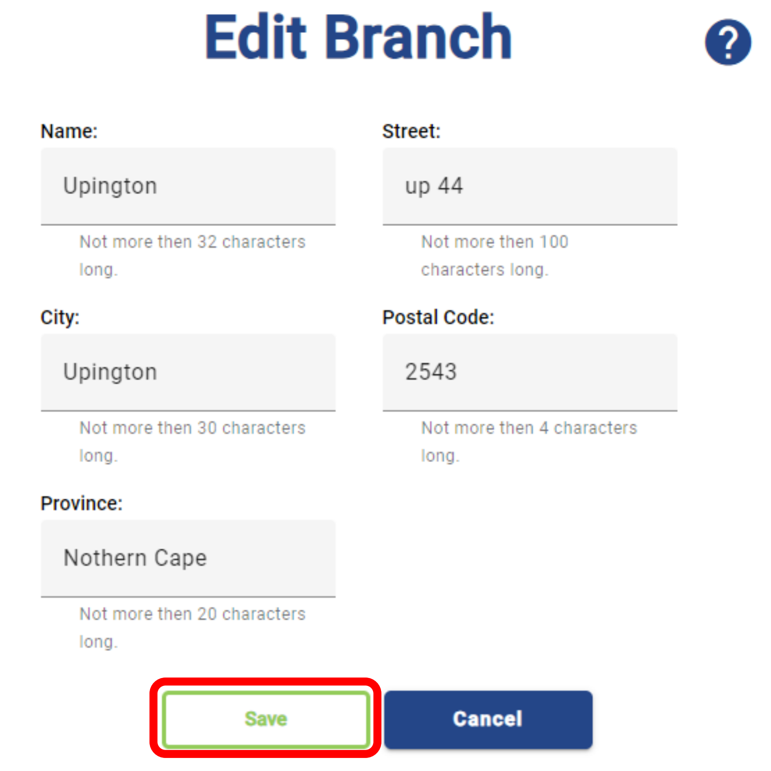


Figure 1 Click Save Edit Branch Button.

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)

## 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)**

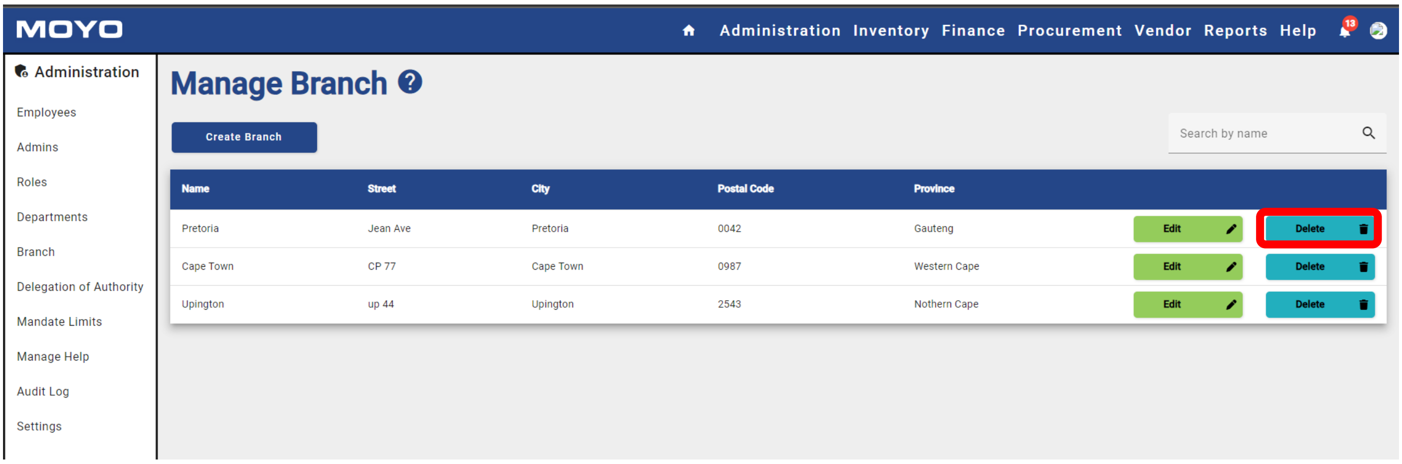


Figure 1 Click Delete Branch Button

**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.**

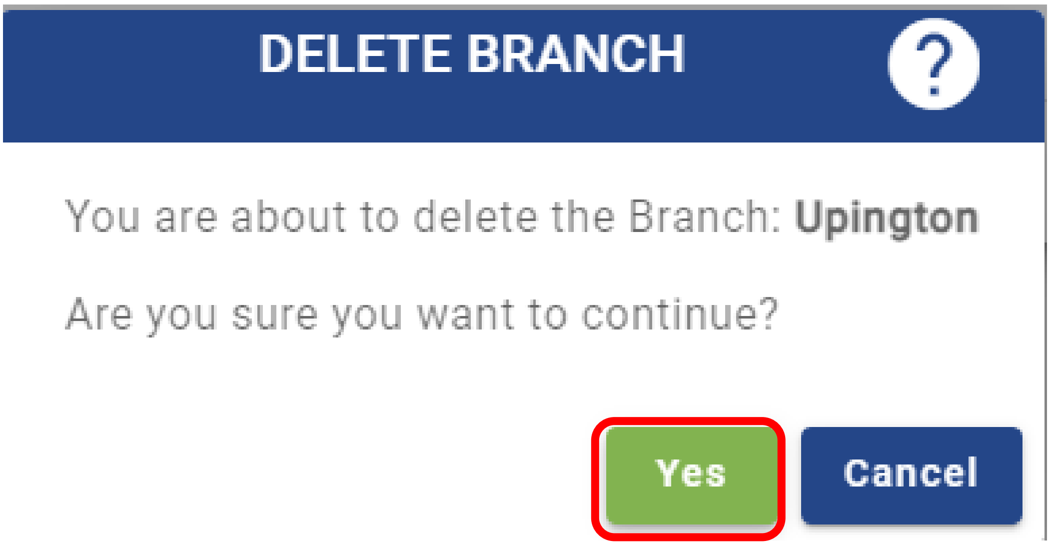


Figure 1 Click Yes Delete Branch Button

# 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:**

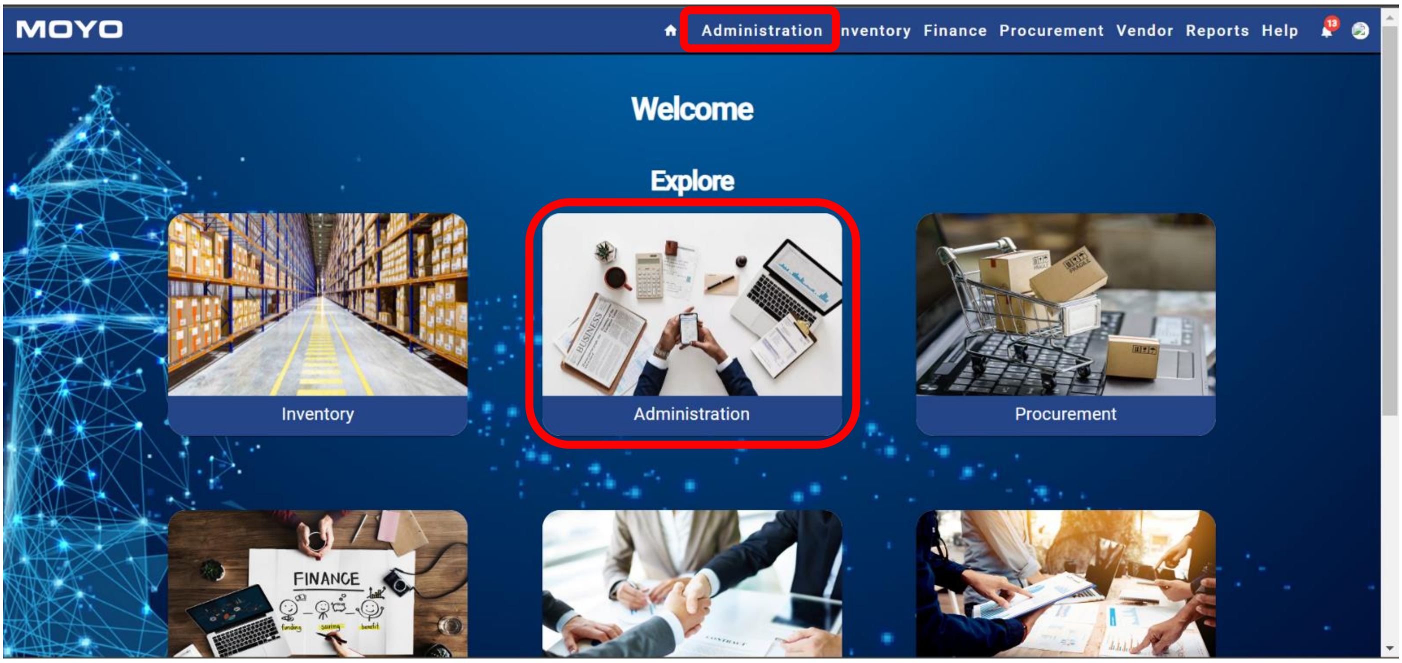


Figure 1 Home Screen to Delegation Screen

**Then Click on the "Delegation of Authority" button on the administration side navbar:**

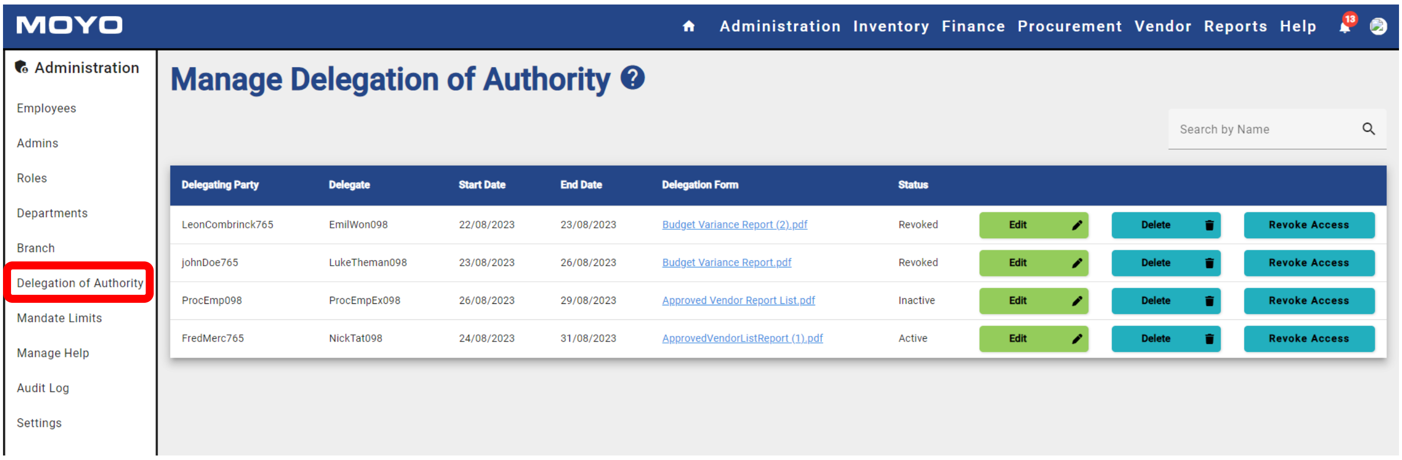


Figure 1 Administration side nav to Delegation Screen

## 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)**

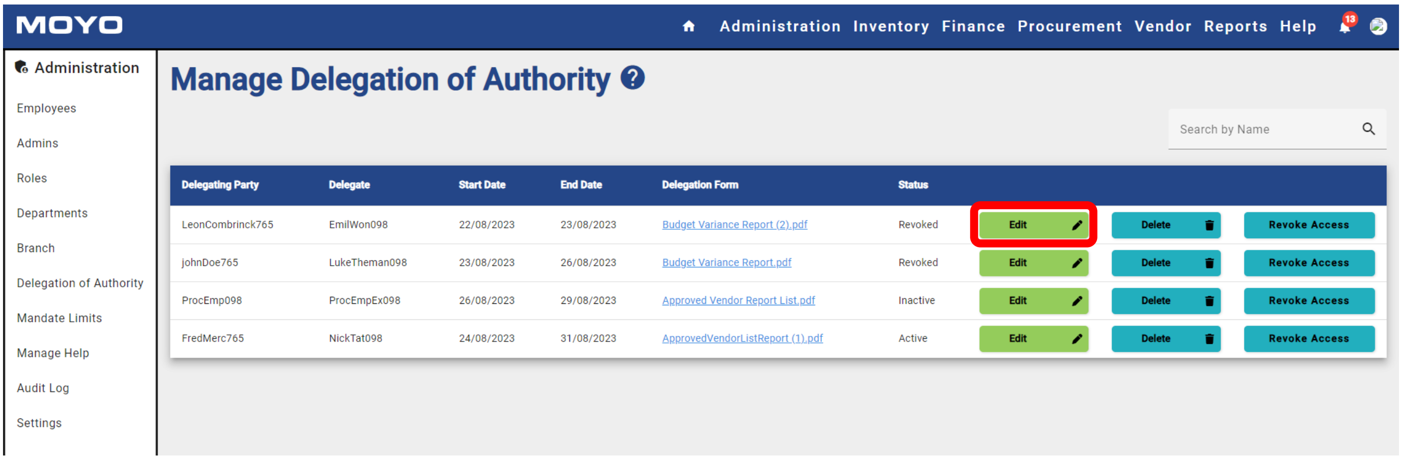


Figure 1 Click Edit Delegation Button.

**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.**

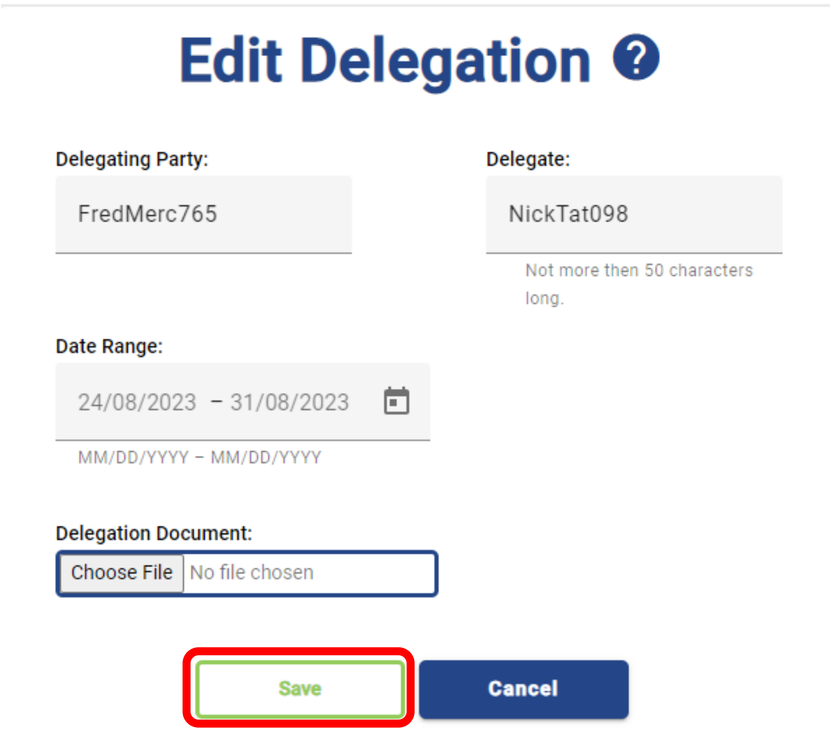


Figure 1 Click Save Edit Delegation Button.

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)**

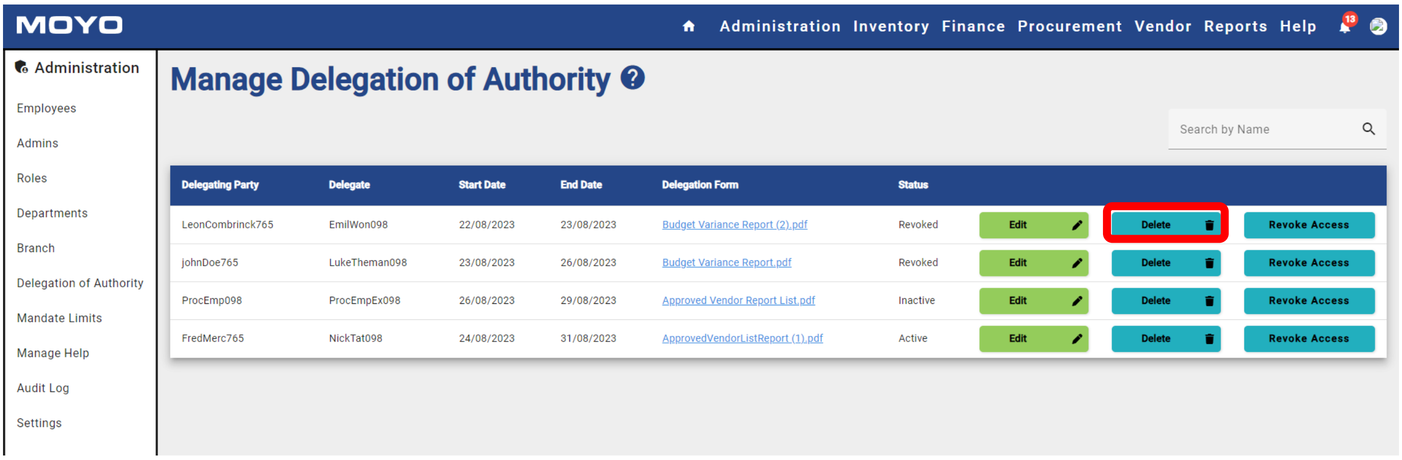


Figure 1 Click Delete Delegation Button

**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.**


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)**

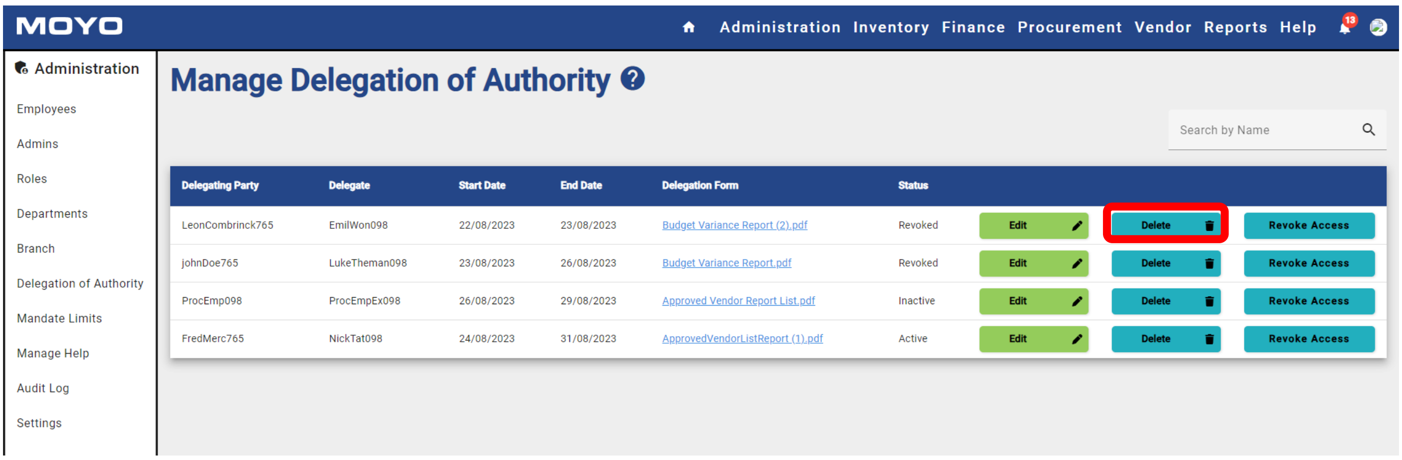


Figure 1 Click Revoke Delegation Button

**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.**

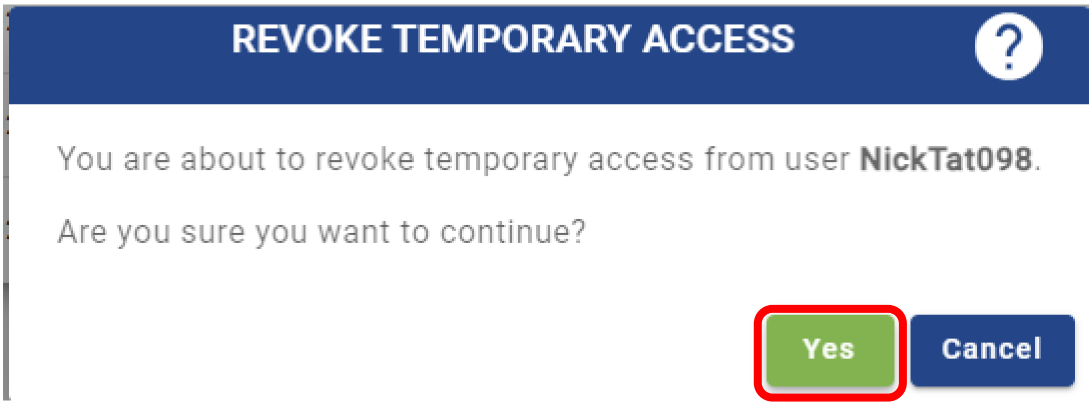


Figure 1 Click Yes Revoke Delegation Button

## Explanation of the Delegation of Authority statuses:

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

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 if 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:**

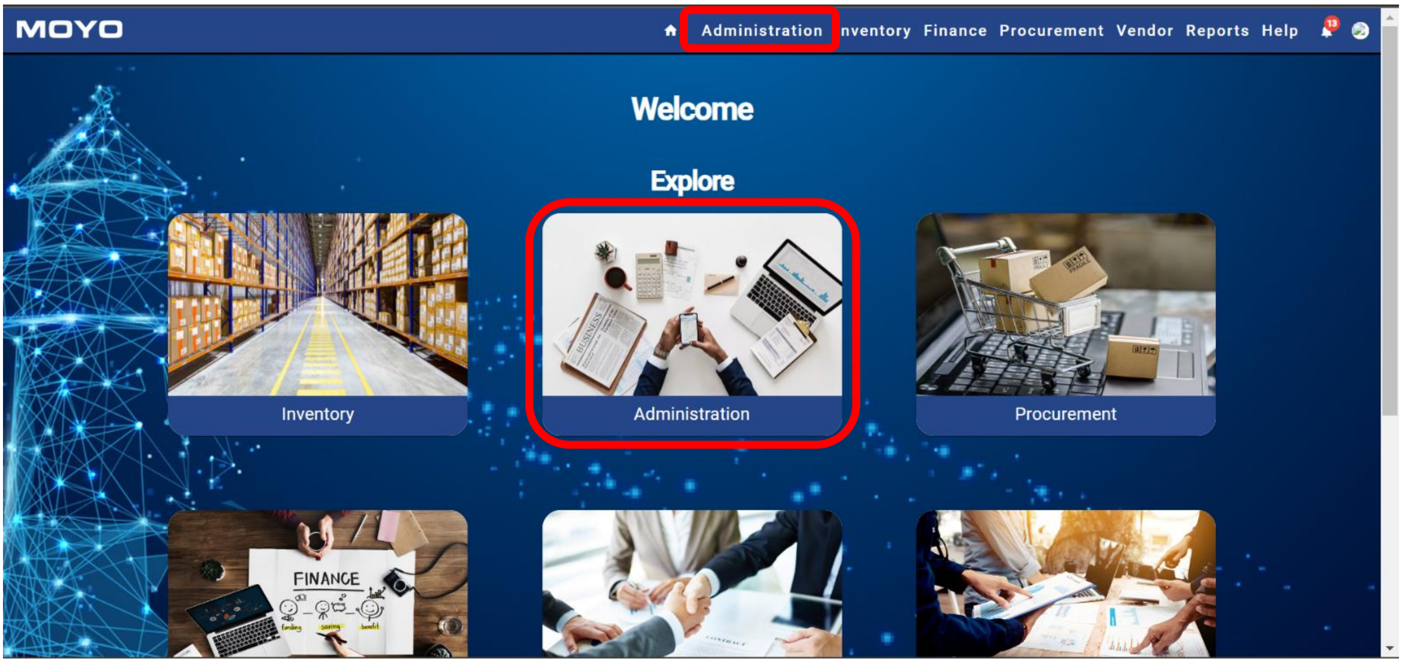


Figure 1 Home Screen to Mandate Limit Screen

**Then Click on the "Mandate Limits" button on the administration side navbar:**

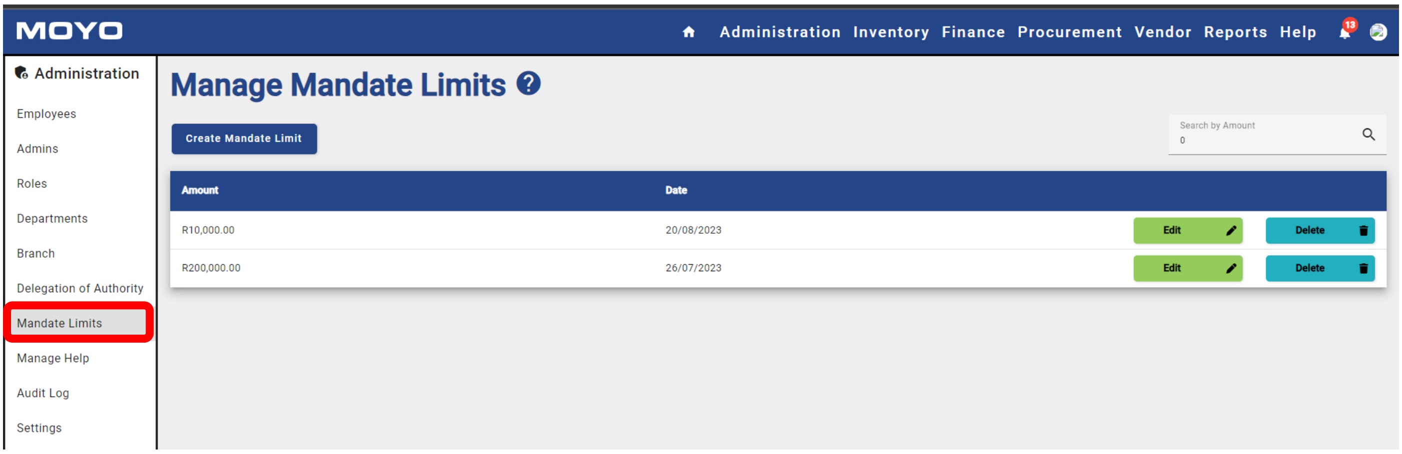


Figure 1 Administration side nav to Mandate Limit Screen

## Step 2 Create Mandate Limit:

**Create a new mandate limit by clicking on the "Create Mandate Limit" button on the mandate limit screen:**

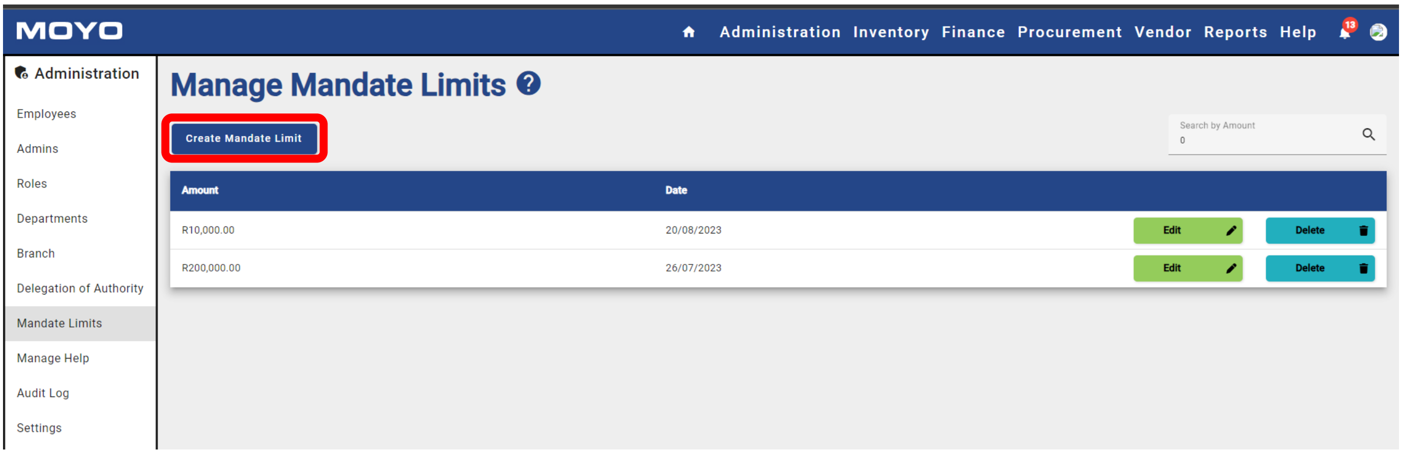


Figure 1 Click Create Mandate Limit Button

**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.**


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)**

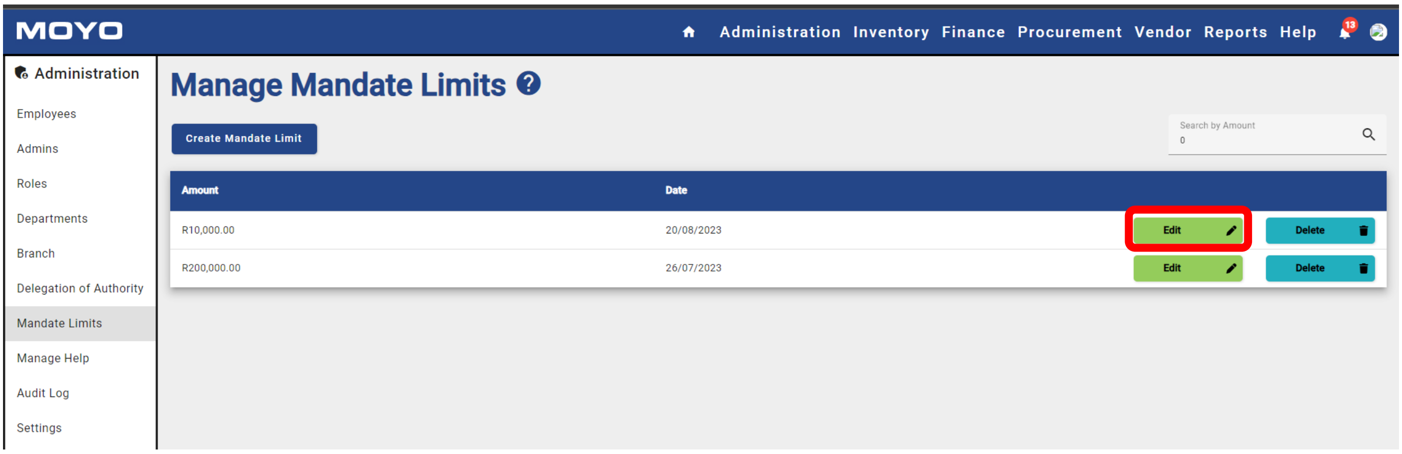


Figure 1 Click Edit Mandate Limit Button.

**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)**


Figure 1 Click Save Edit Mandate Limit Button.

1. "Amount": Change the amount of the mandate limit. (Not Compulsory)
2. "Date": Change the date of the mandate limit. (Not Compulsory)

## 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)**

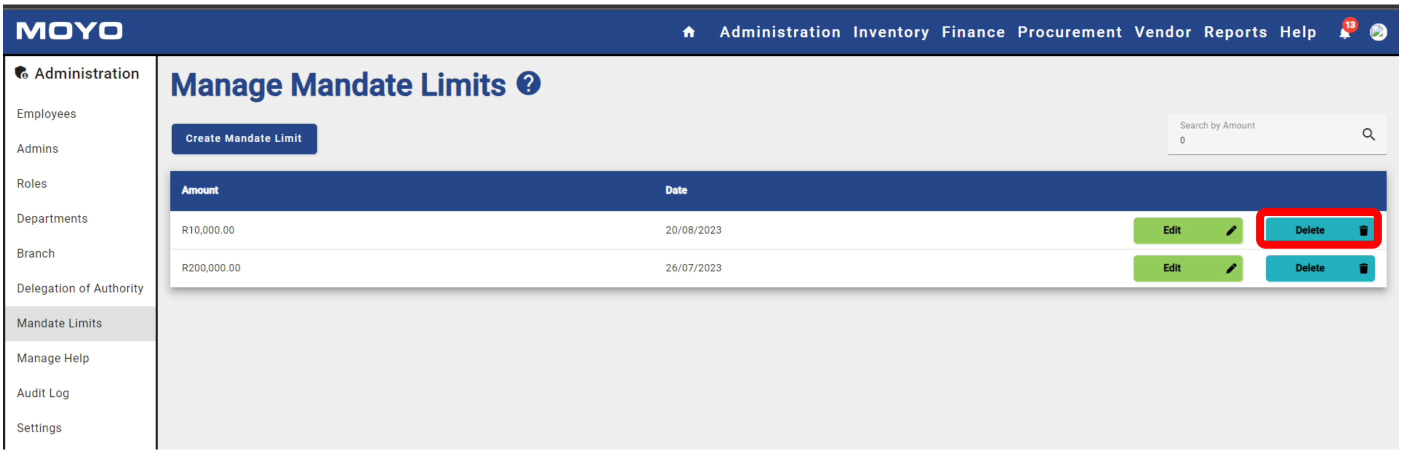


Figure 1 Click Delete Mandate Limit Button

**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.**

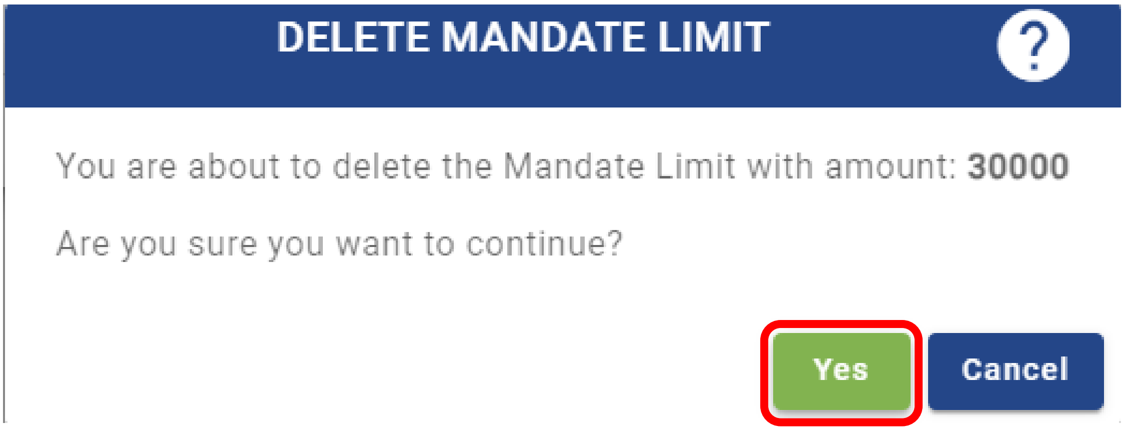


Figure 1 Click Yes Delete Mandate Limit Button

# 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:**

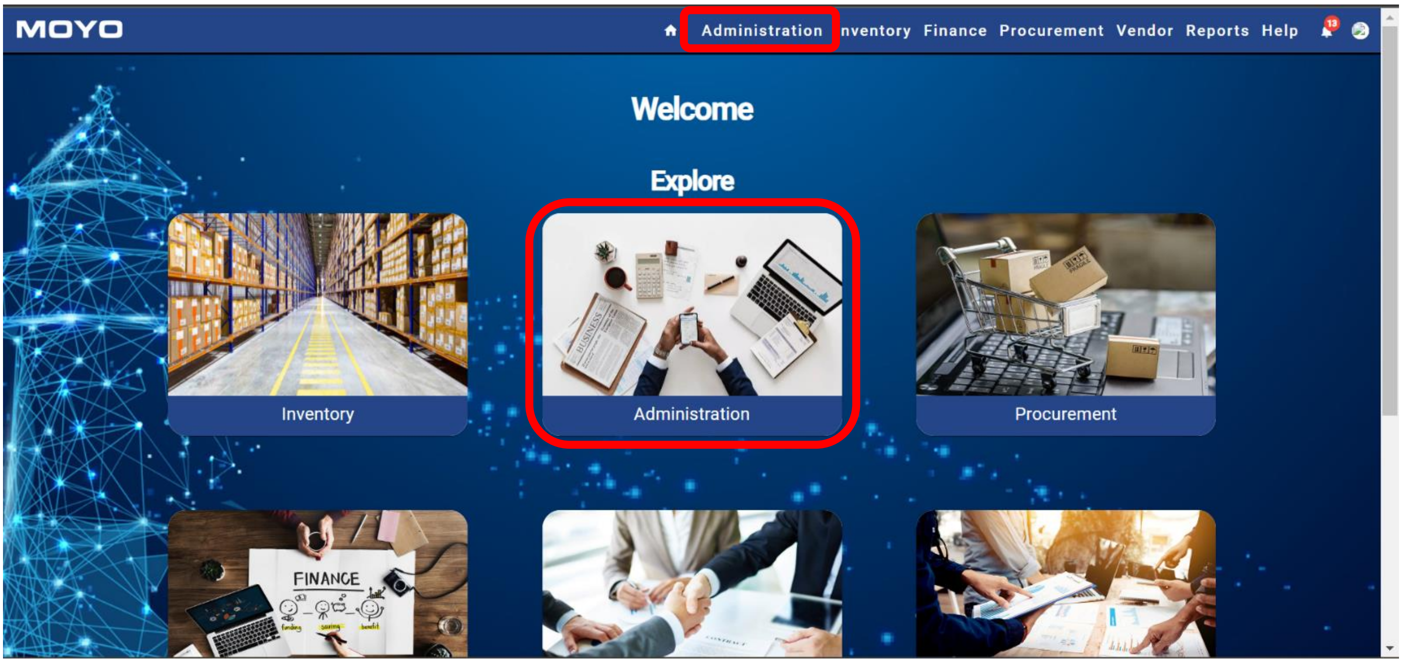


Figure 1 Home Screen to Audit Log Screen

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

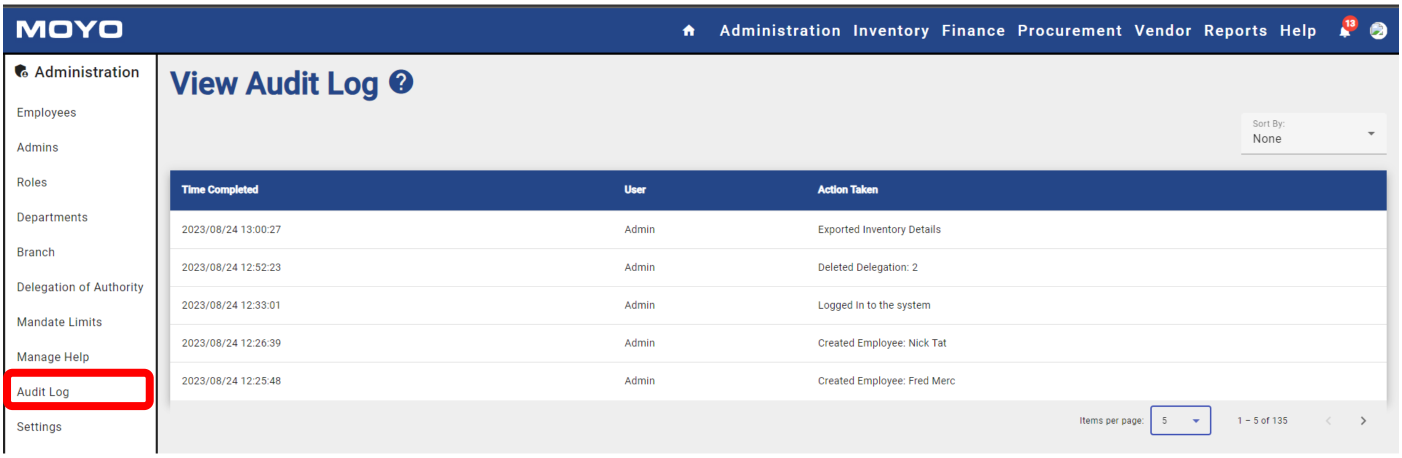


Figure 1 Administration side nav to Audit Log Screen

## 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.**

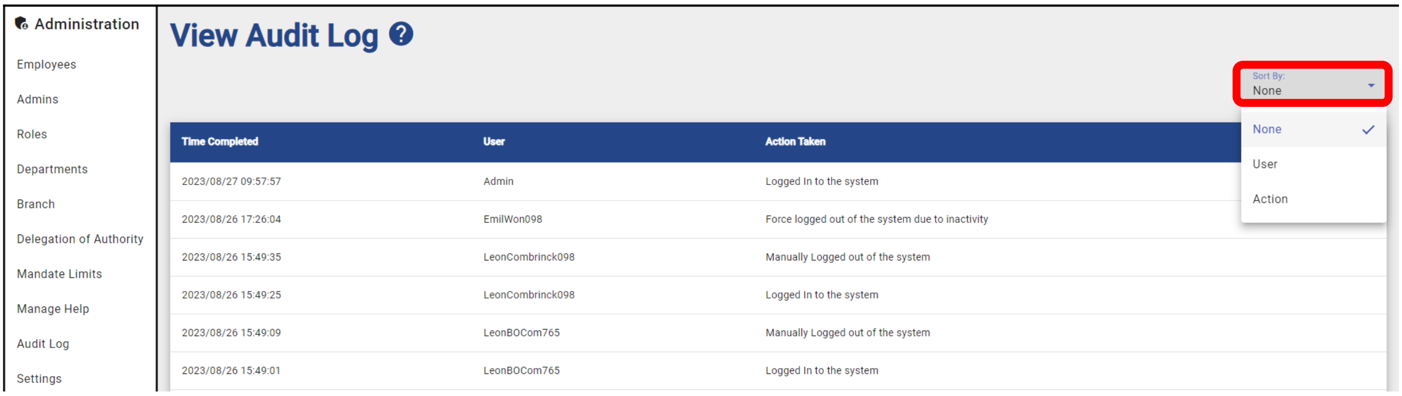


Figure 1 Sort By Audit Log

- "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:**

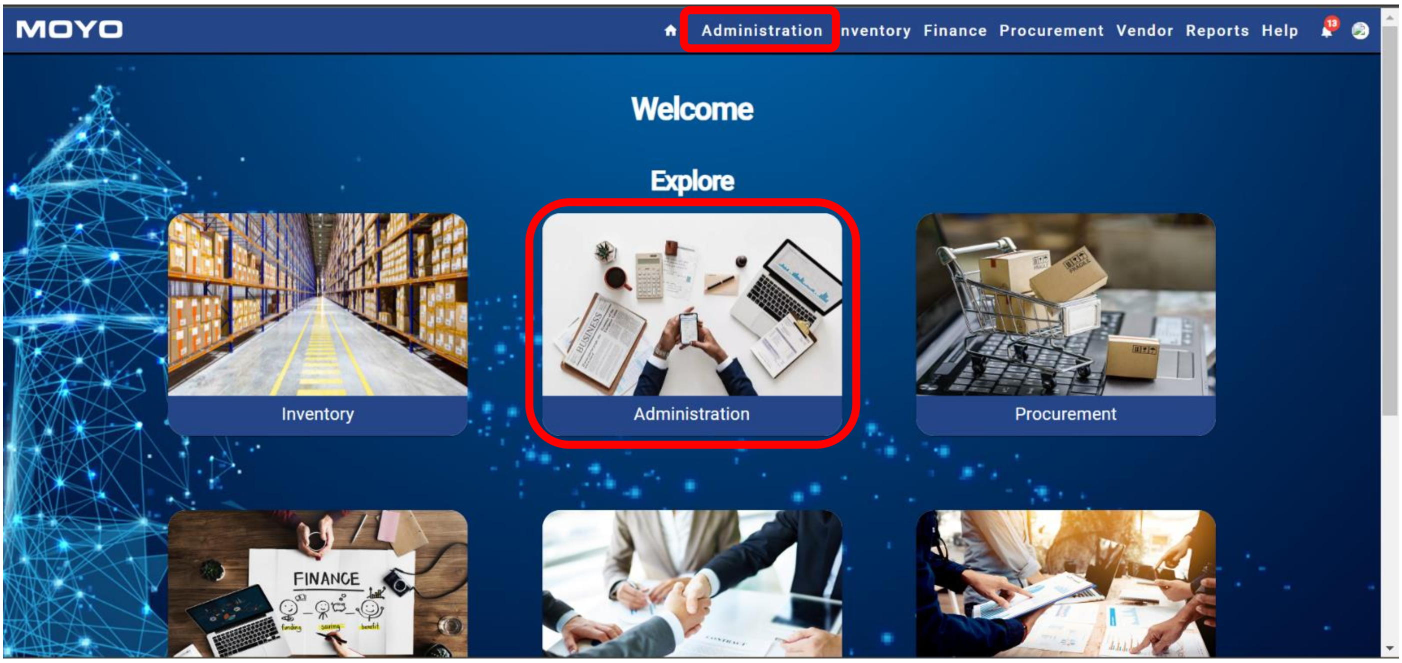


Figure 1 Home Screen to Settings Dropdown

**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.**

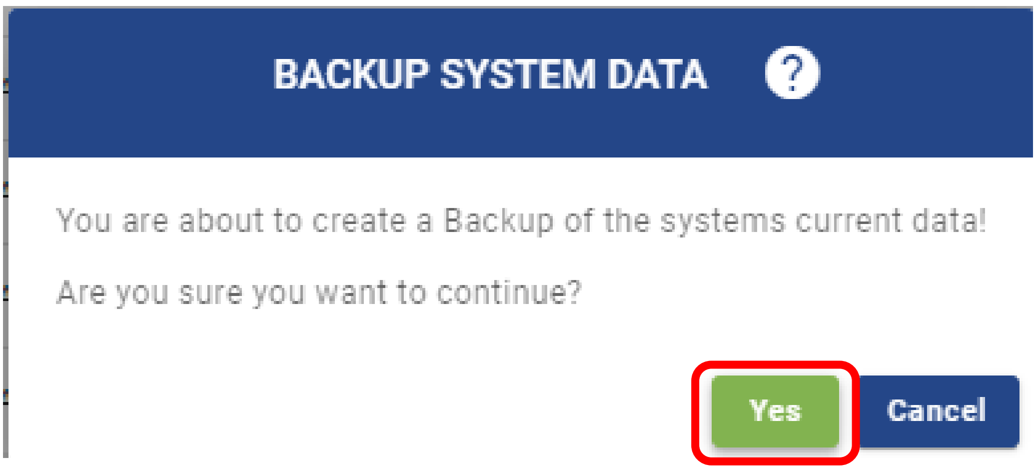


Figure 1 Backup System Screen

## 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.**

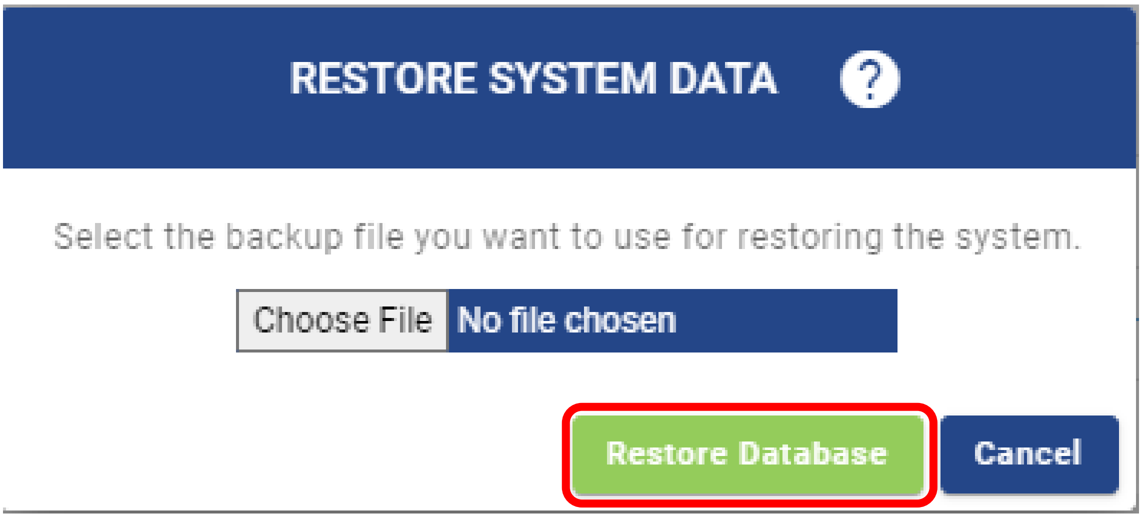


Figure 1 Restore System Screen

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:**

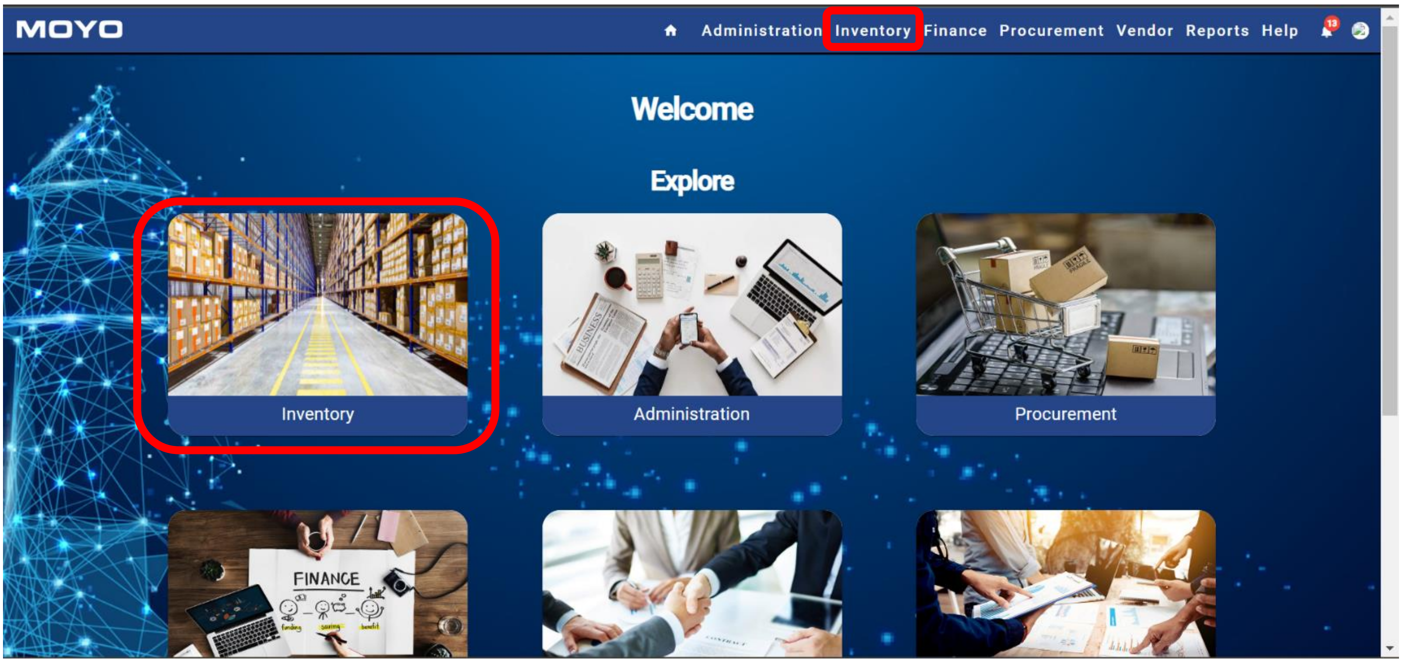


Figure 1 Home Screen to Consumable Screen.

**Then Click on the "View Consumable" button on the Inventory side navbar:**

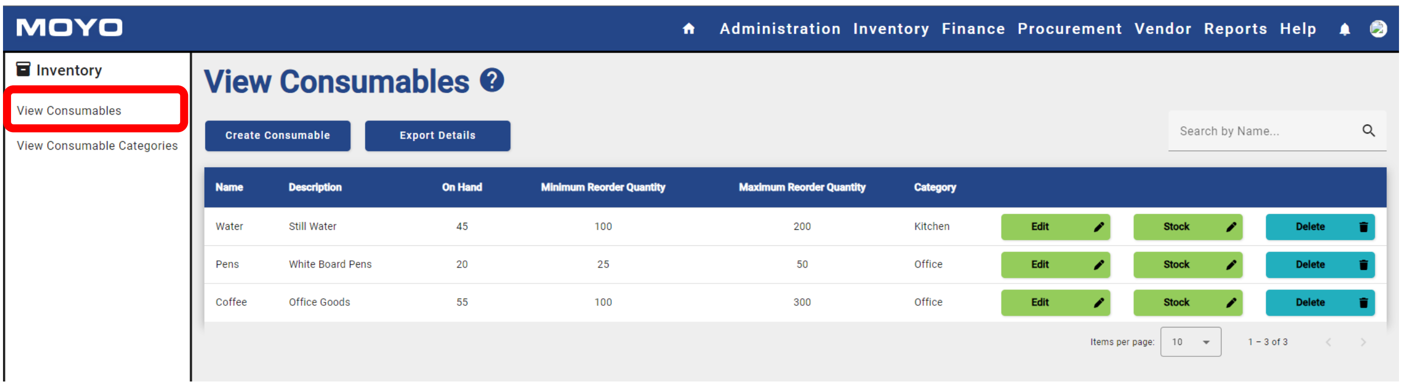


Figure 1 Inventory Side Nav to Consumable Screen.

## Step 2 Create Consumable:

**Create a new consumable by clicking on the "Create Consumable" button on the view consumable screen:**

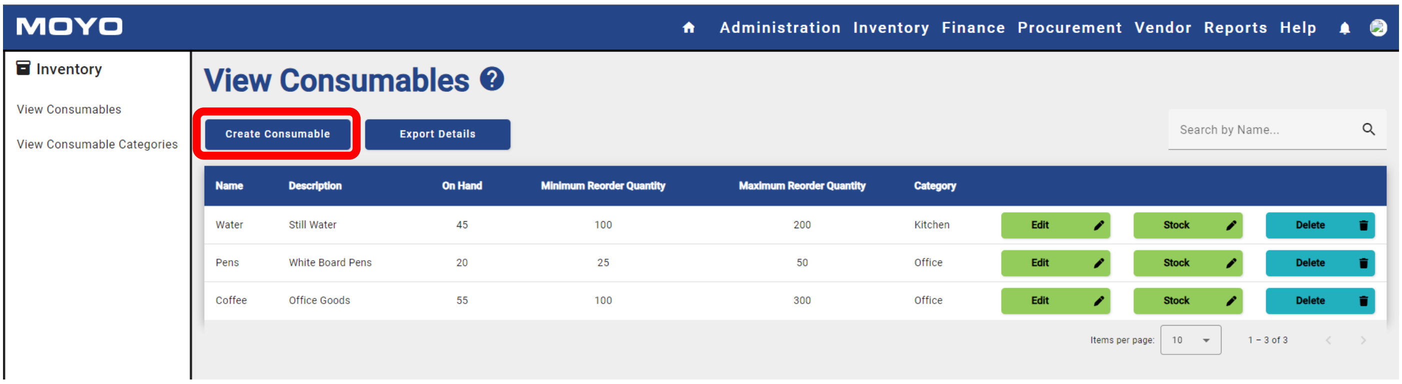


Figure 1 Click Create Consumable Button.

**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.**

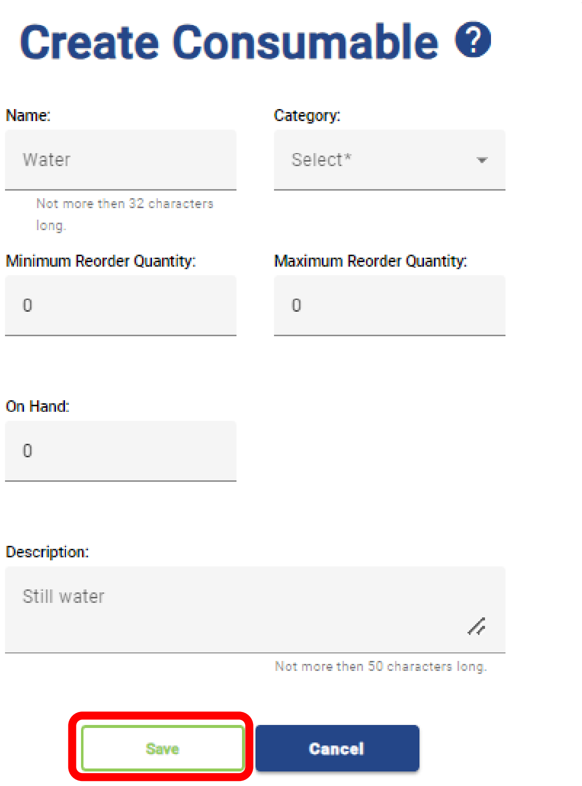


Figure 1 Click Save Create Consumable Button.

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.**

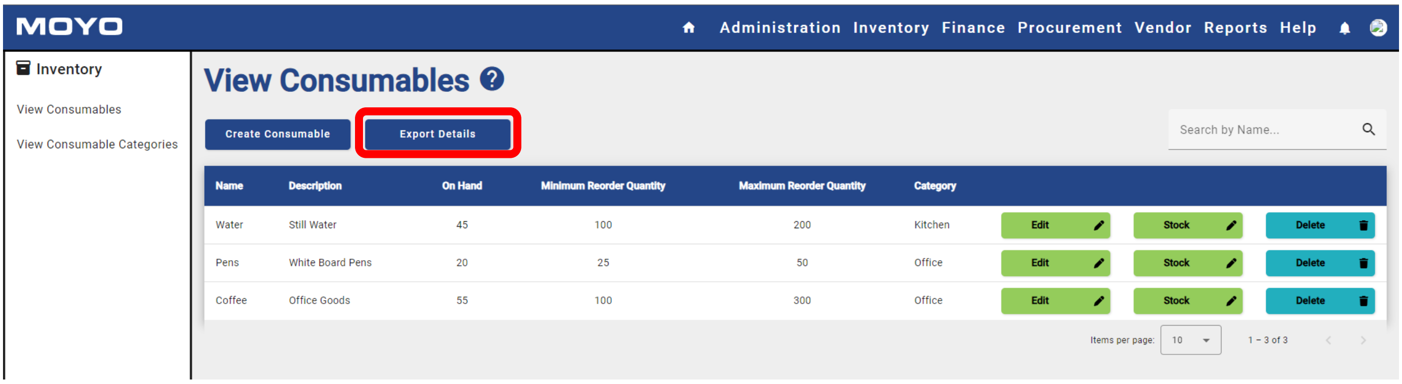


Figure 1 Click Edit Mandate Limit Button.

**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.**

MOYO
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)**

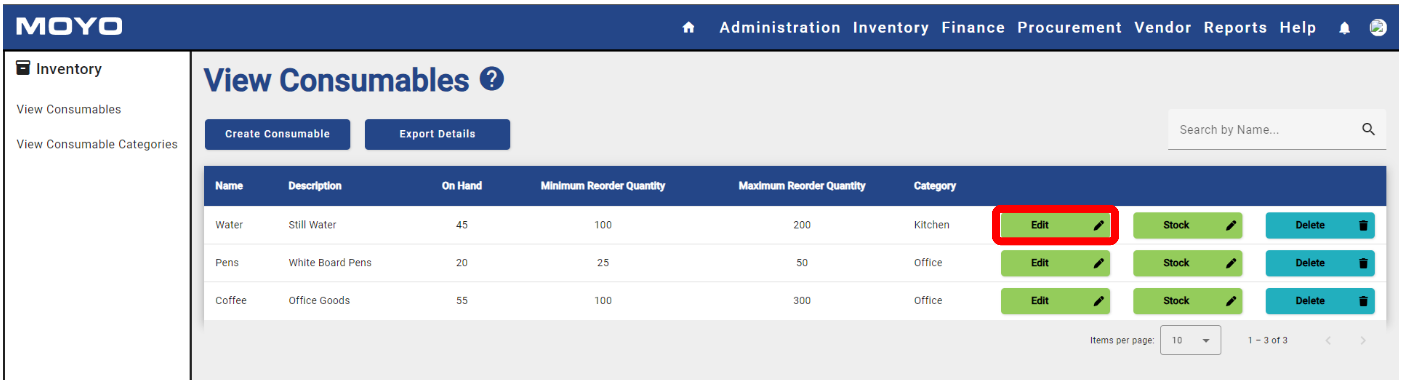


Figure 1 Click Edit Mandate Limit Button.

**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)**

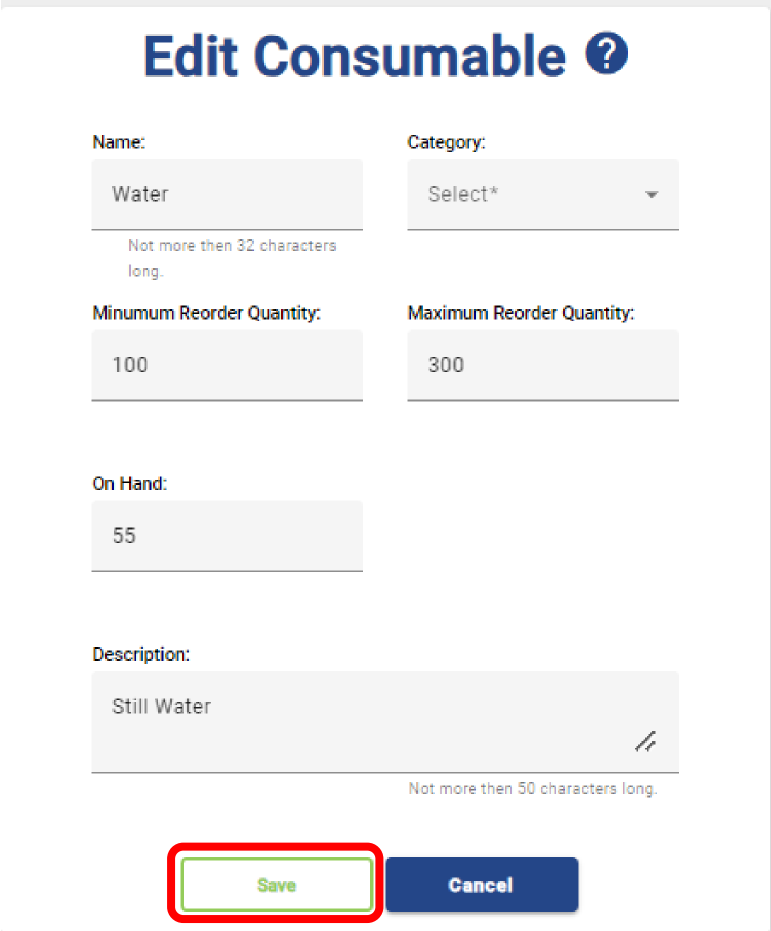


Figure 1 Click Update Stock Edit Consumable Button.

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)**

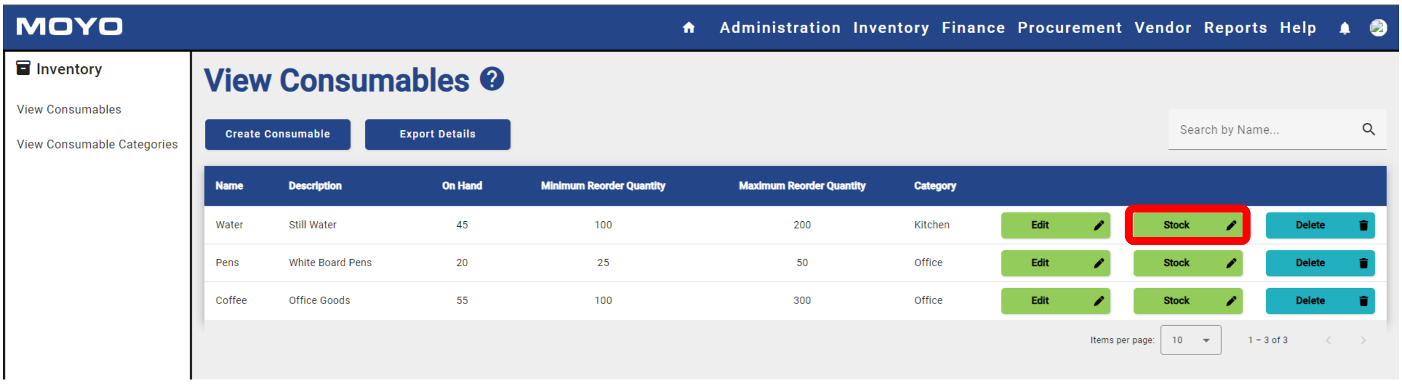


Figure 1 Click Stock Consumable Button

**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.**


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)**

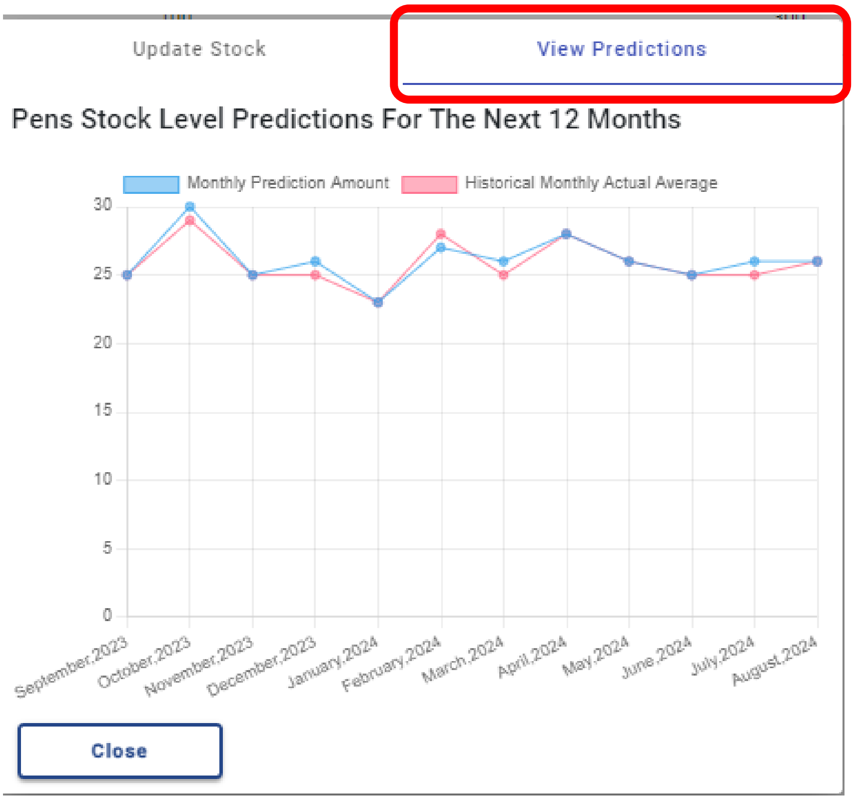


Figure 1 Click View Prediction Consumable Button

## 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)**

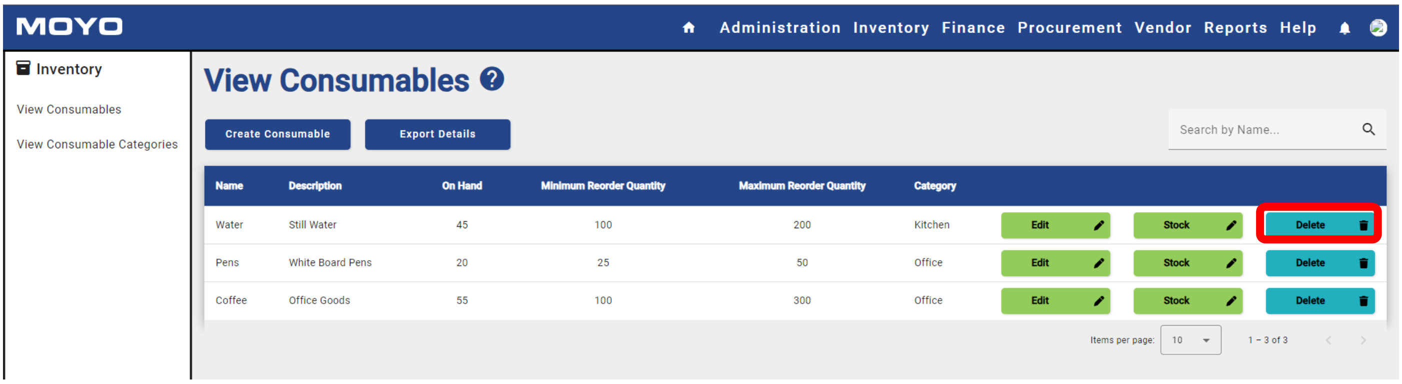


Figure 1 Click Delete Consumable Button

**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.**

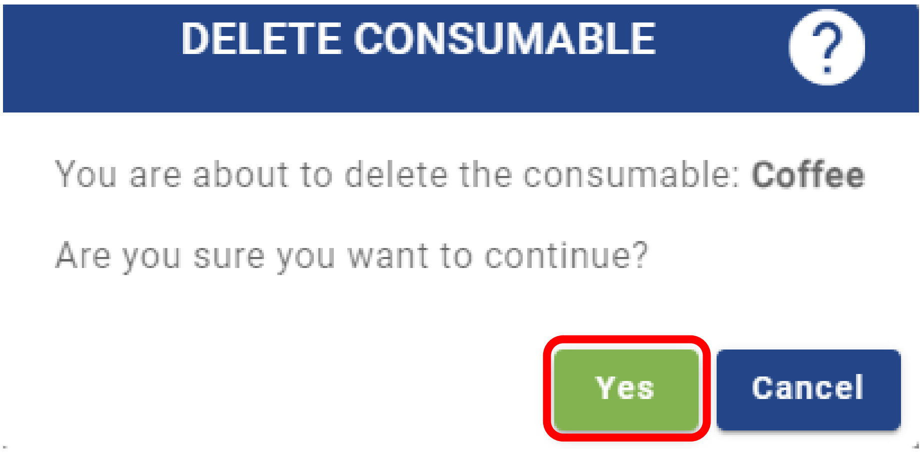


Figure 1 Click Yes Delete Consumable Button

# 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:**

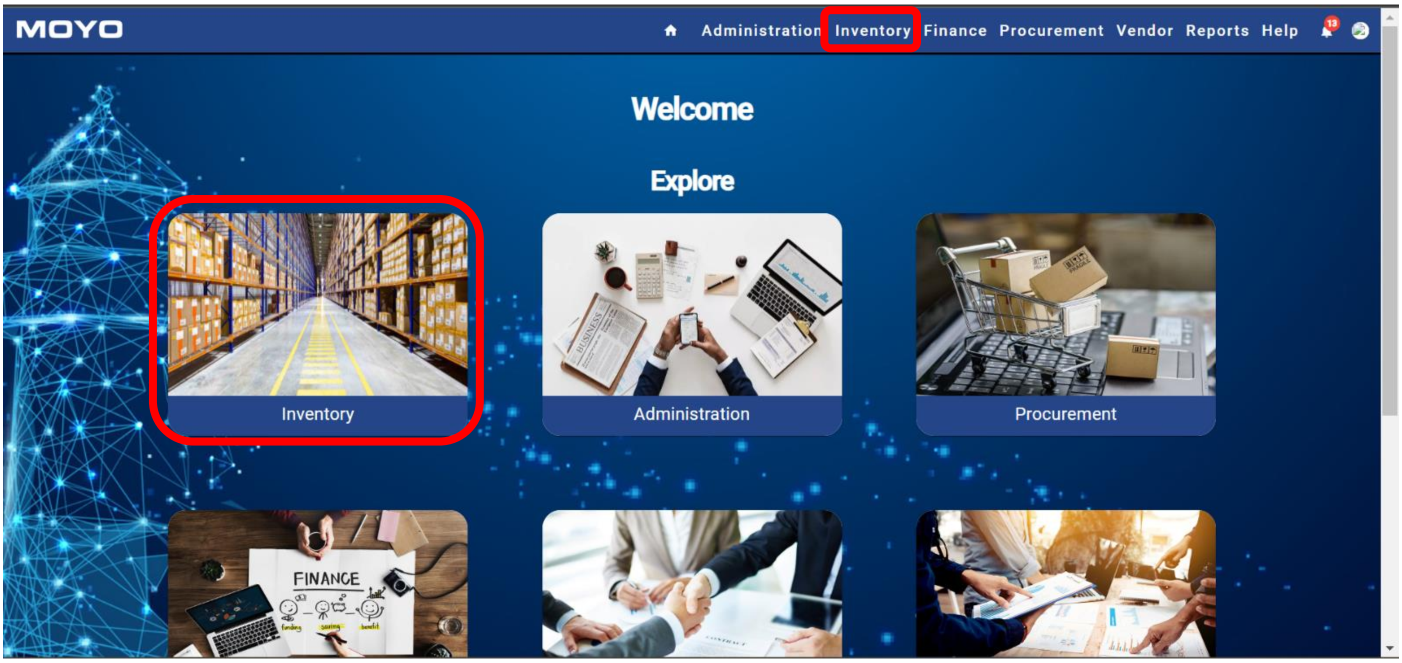


Figure 1 Home Screen to Consumable Category Screen

**Then Click on the "View Consumable Category" button on the inventory side navbar:**

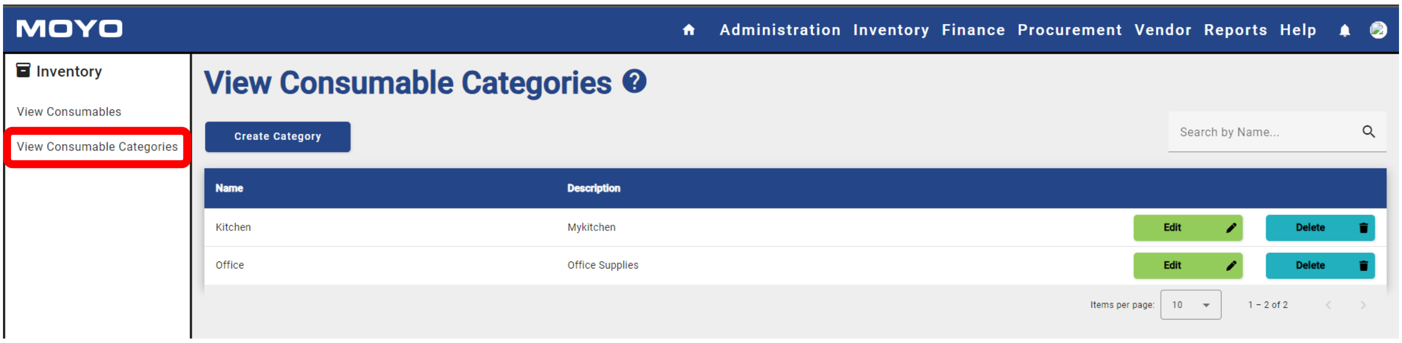


Figure 1 Inventory side nav to Consumable Category Screen

## Step 2 Create Consumable Category:

**Create a new Consumable Category by clicking on the "Create Category" button on the Consumable Category screen:**

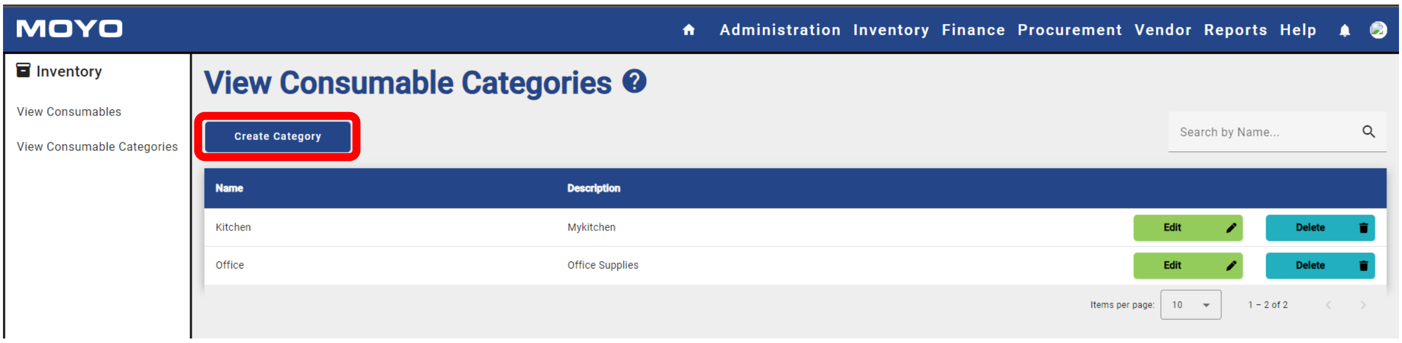


Figure 1 Click Create Consumable Category Button

**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.**

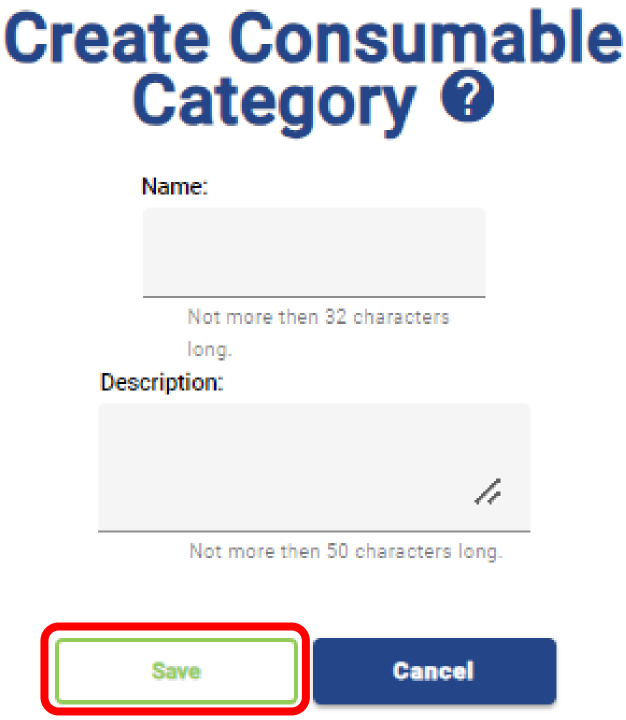


Figure 1 Click Save Create Consumable Category Button

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)**

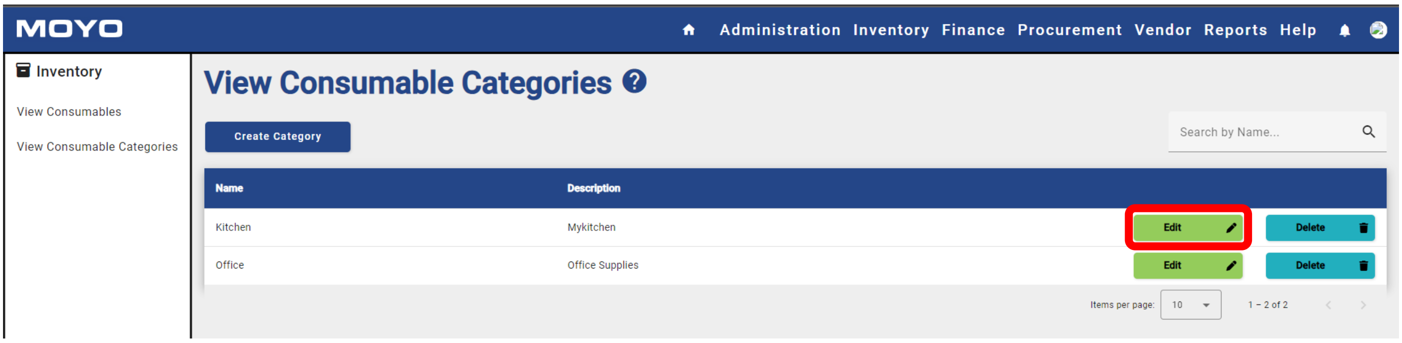


Figure 1 Click Edit Consumable Category Button.

**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)**

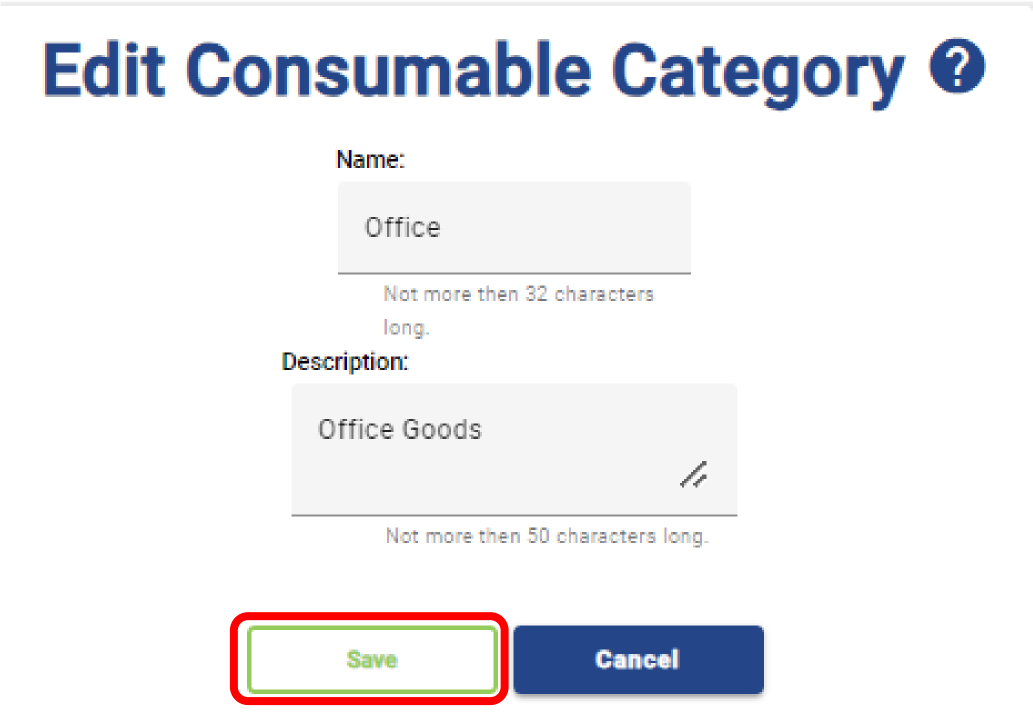


Figure 1 Click Save Edit Consumable Category Button.

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)**

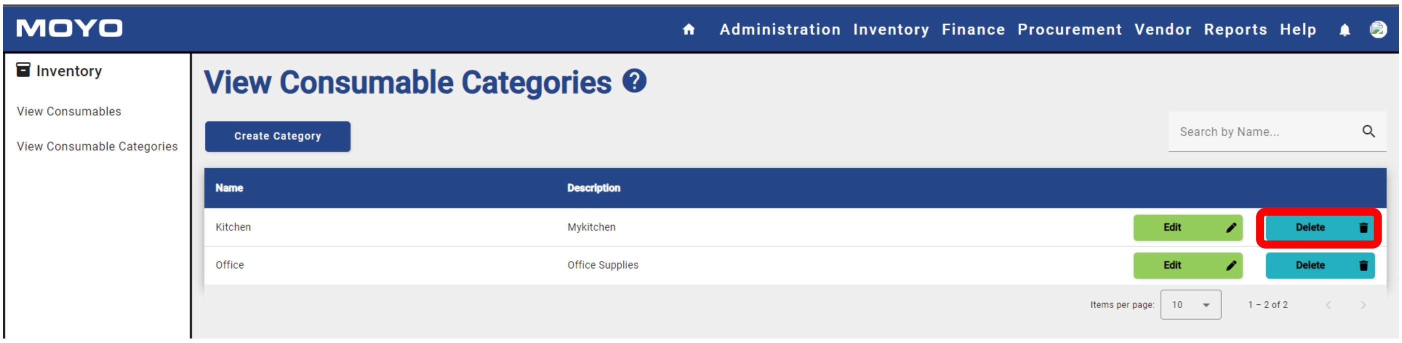


Figure 1 Click Delete Consumable Category Button

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.

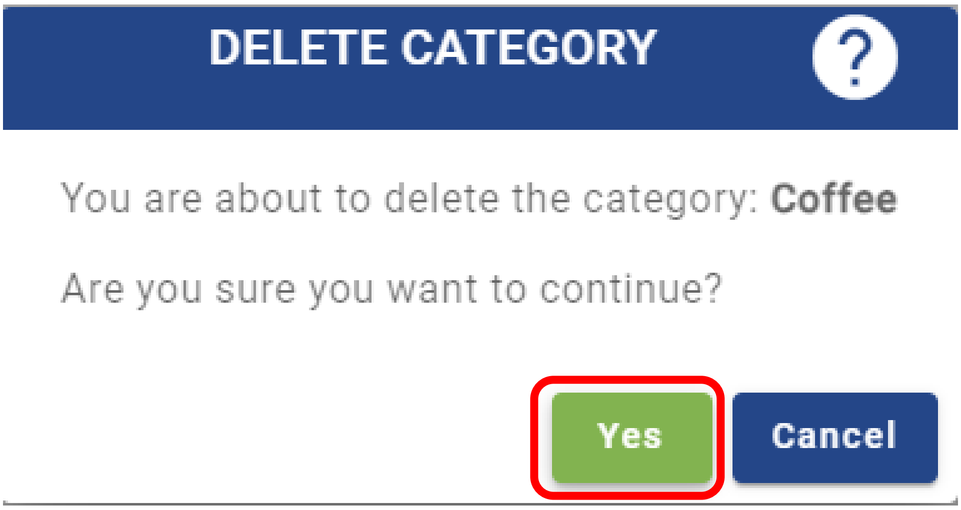


Figure 1 Click Yes Delete Consumable Category Button

# 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:**

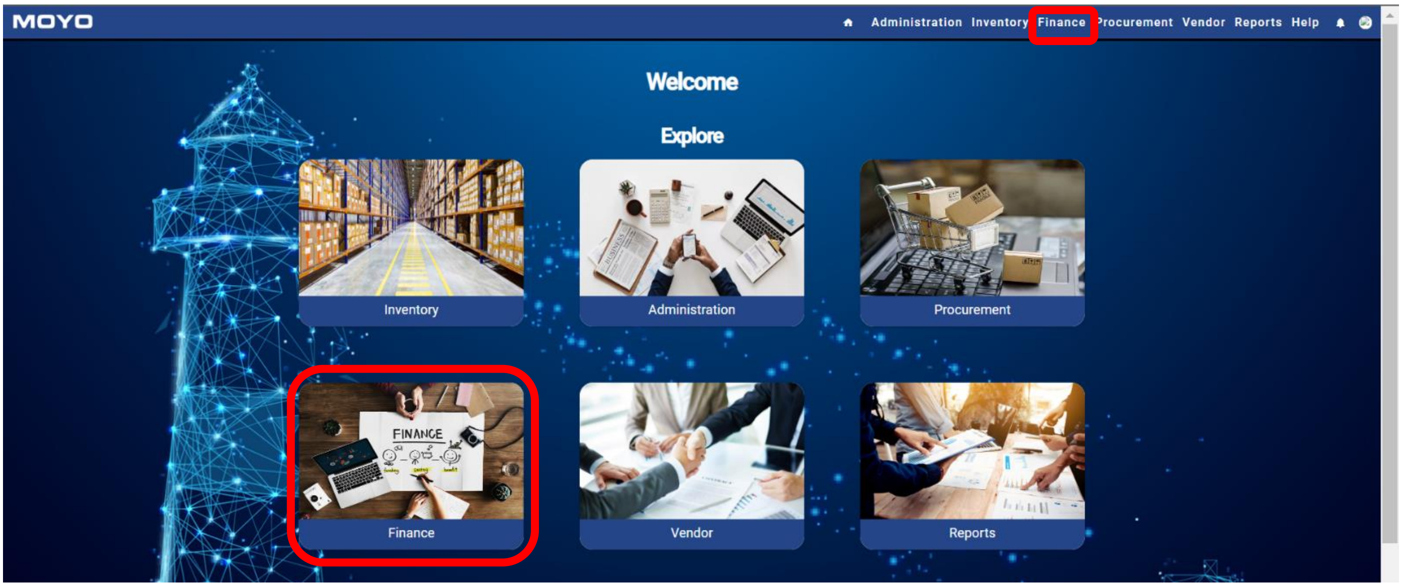


Figure 1 Home Screen to Budget Category Screen

**Then Click on the "Budget Category" button on the Finance side navbar:**

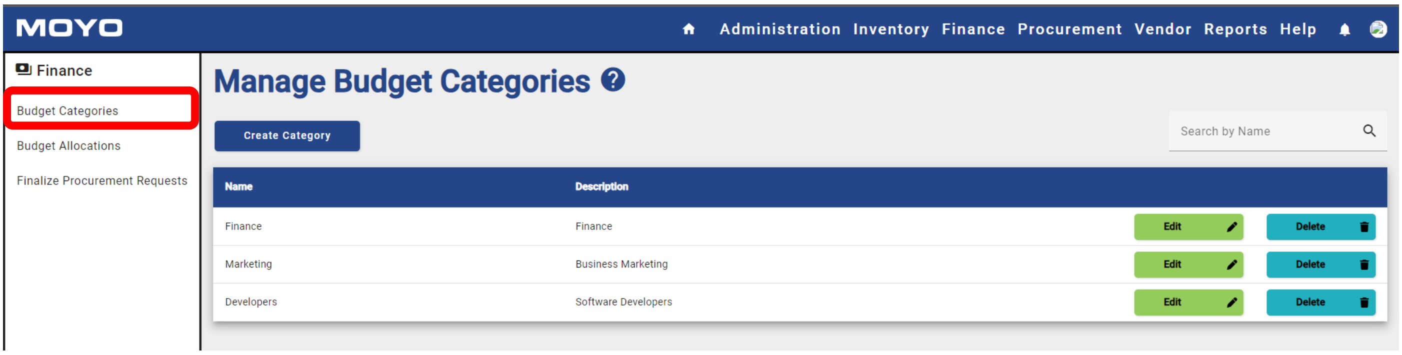


Figure 1 Finance side nav to Budget Category Screen

## Step 2 Create Budget Category:

**Create a new Budget Category by clicking on the "Create Category" button on the Budget Category screen:**

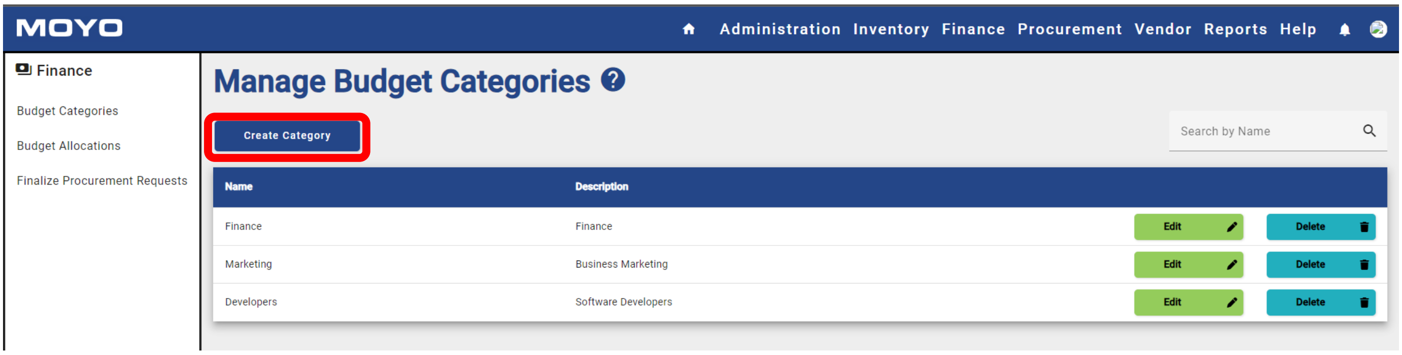


Figure 1 Click Create Budget Category Button

**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.**

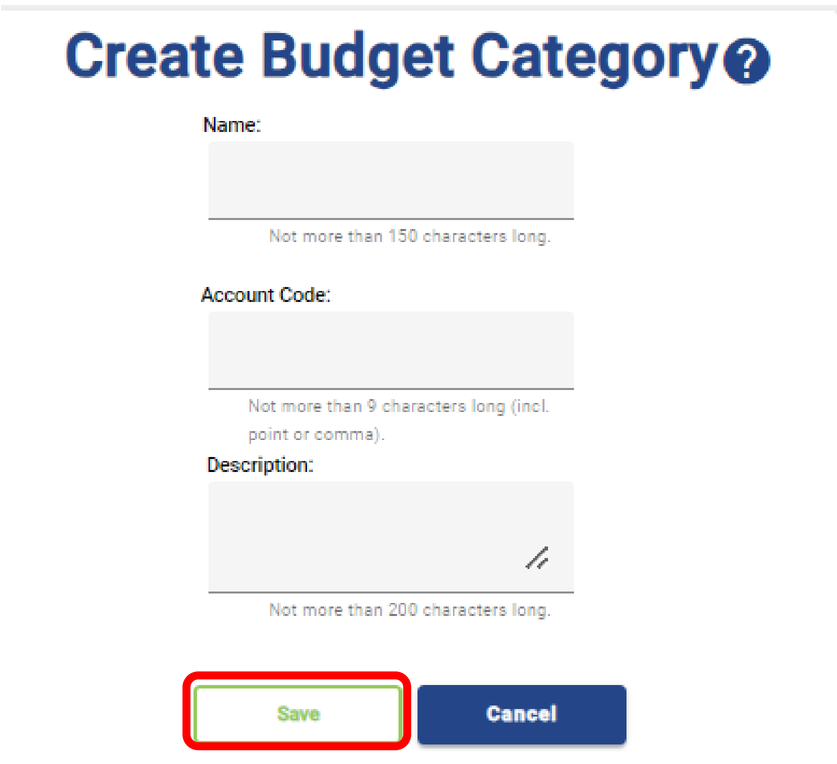


Figure 1 Click Save Create Budget Category Button

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)**

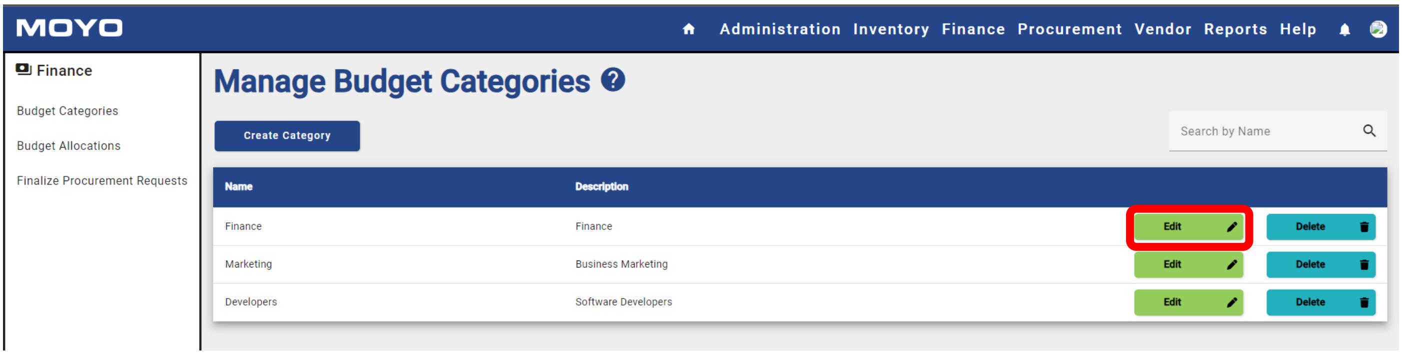


Figure 1 Click Edit Budget Category Button.

**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)**

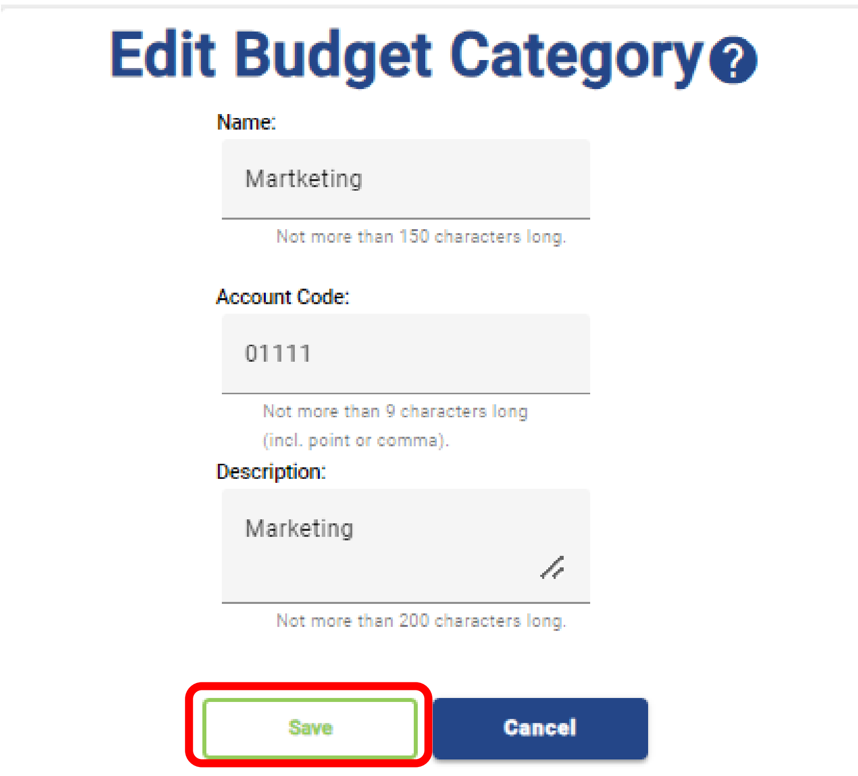


Figure 1 Click Save Edit Budget Category Button.

1. "Name": Change the name of the Budget Category. (Not Compulsory)
2. "Account Code": Change the account code of the Budget Category. (Compulsory)
3. "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)**

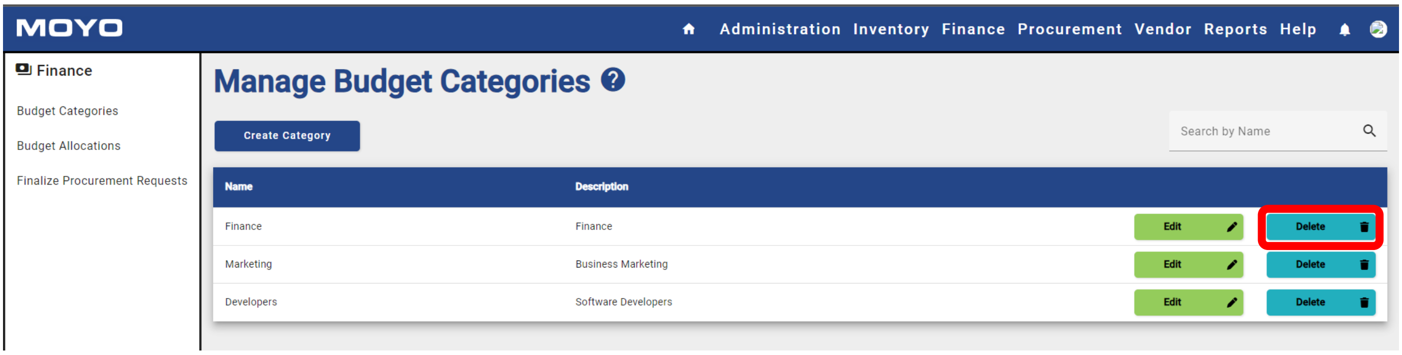


Figure 1 Click Delete Budget Category Button

**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.**

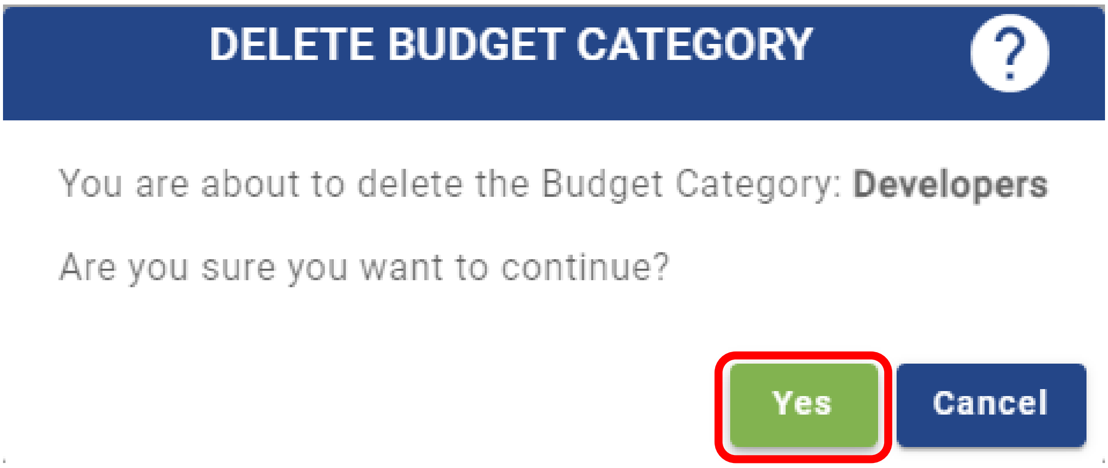


Figure 1 Click Yes Delete Budget Category Button

# Budget Allocation:

Create Budget Allocation, import form 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:**

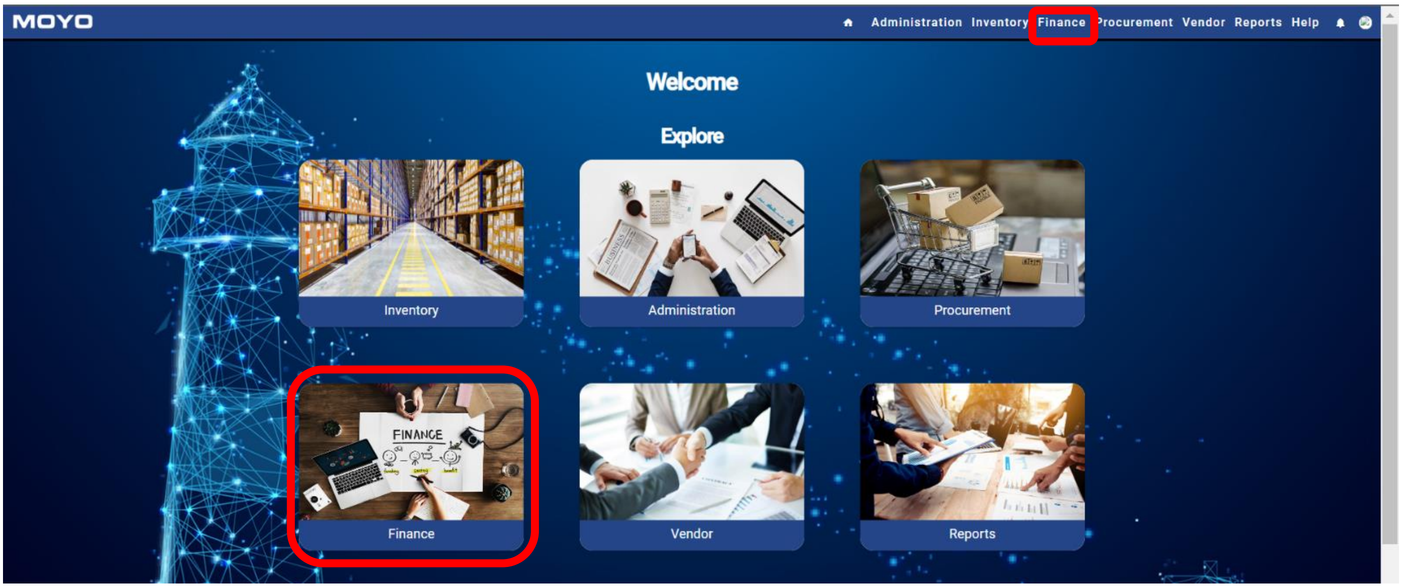


Figure 1 Home Screen to Budget Allocation Screen

**Then Click on the "Budget Allocation" button on the Finance side navbar:**

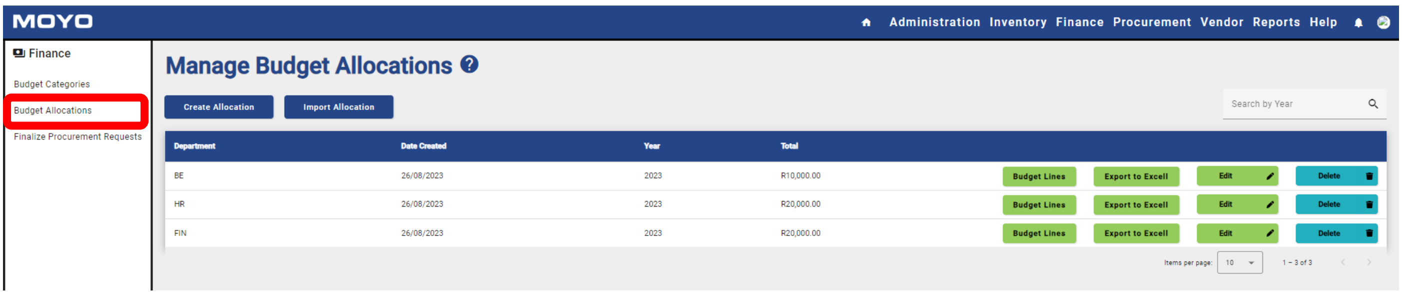


Figure 1 Finance side nav to Budget Allocation Screen

## Step 2 Create Budget Allocation:

**Create a new Budget Allocation by clicking on the "Create Allocation" button on the Budget Allocation screen:**

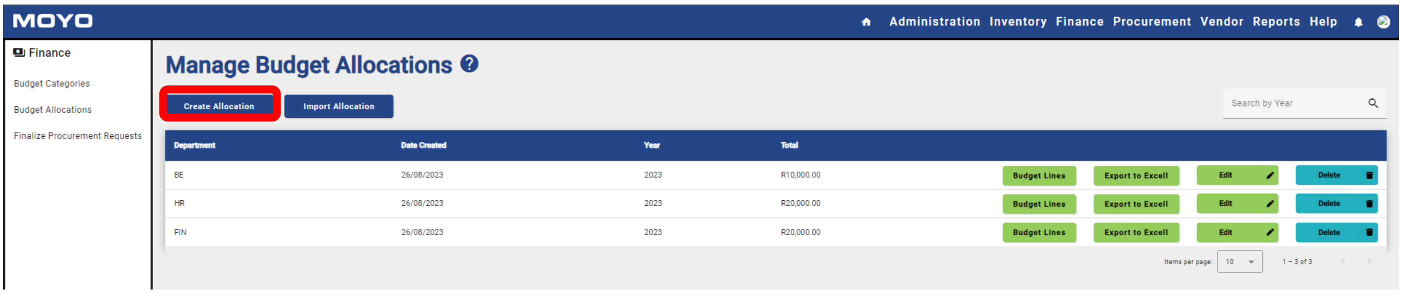


Figure 1 Click Create Budget Allocation Button

**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.**

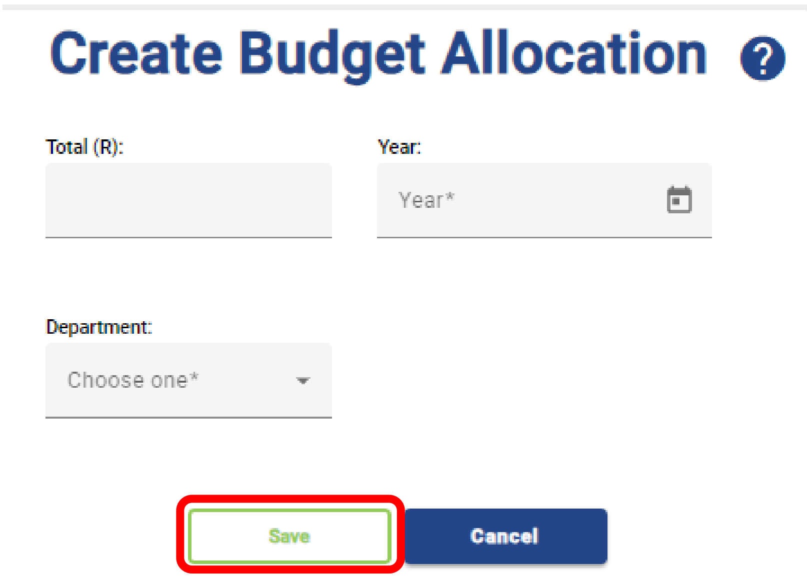


Figure 1 Click Save Create Budget Allocation Button

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:**

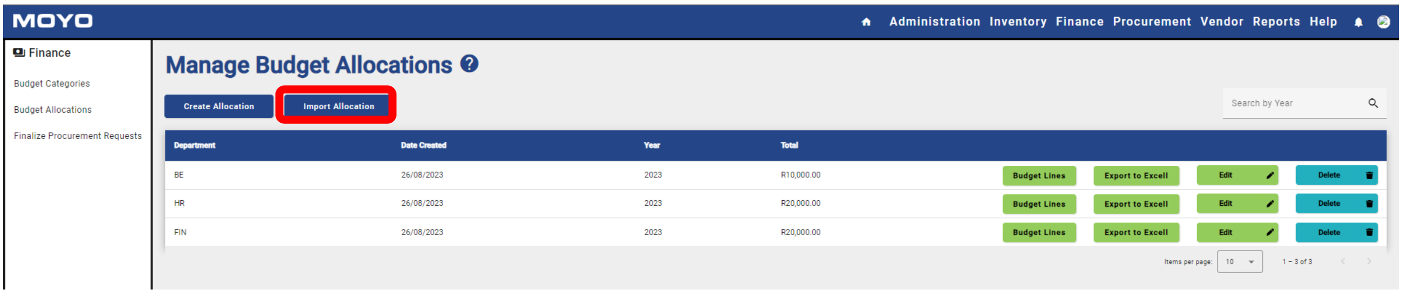


Figure 1 Click Import Allocation Button

**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)**

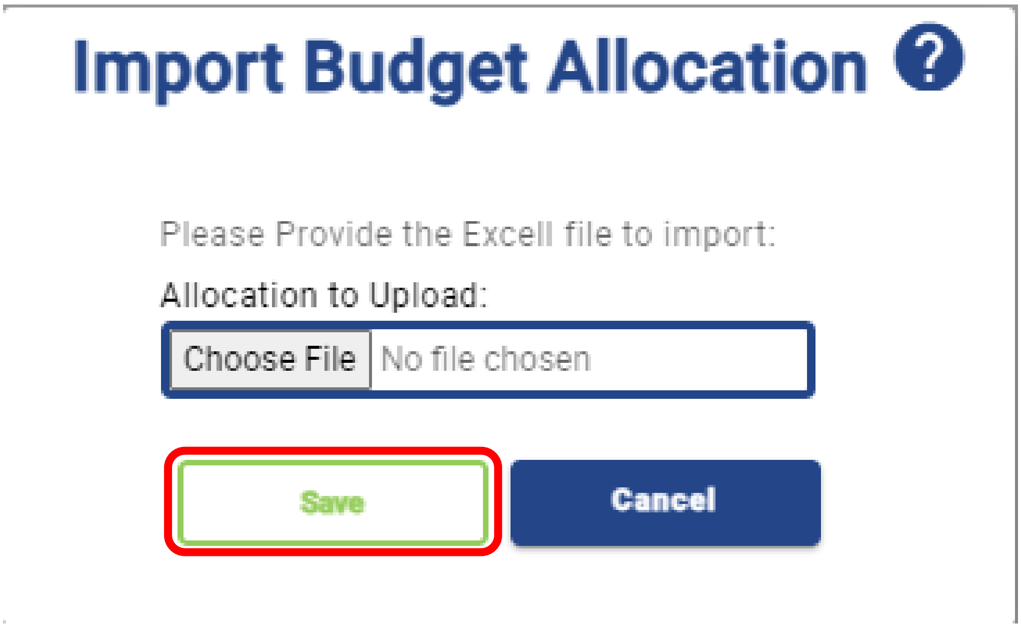


Figure 1 Import Budget Allocation Screen

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:**

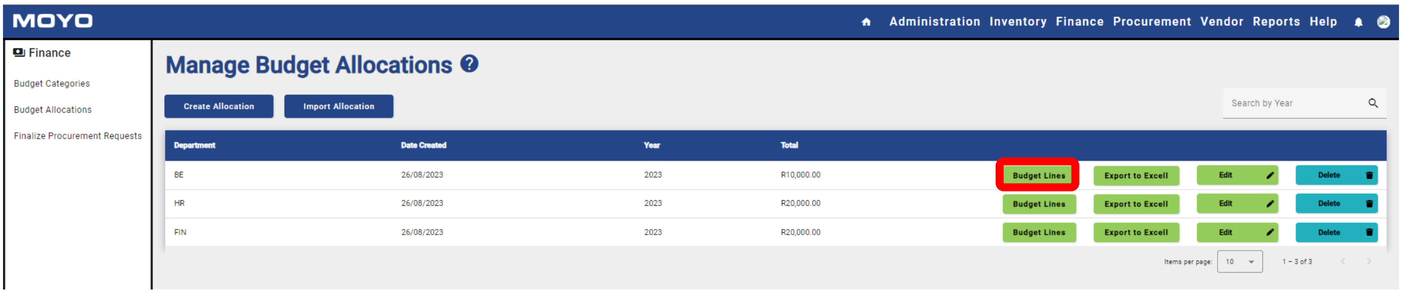


Figure 1 Click View Budget Line Button

**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)**

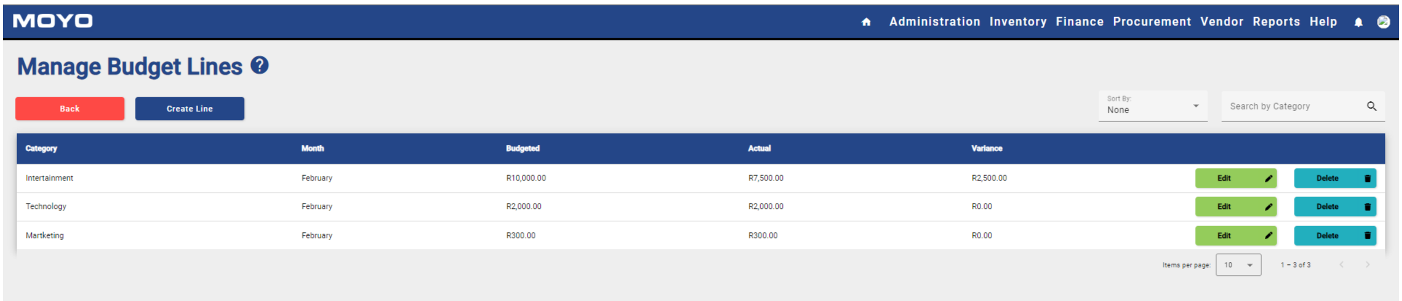


Figure 1 Budget Line Screen

## 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:**

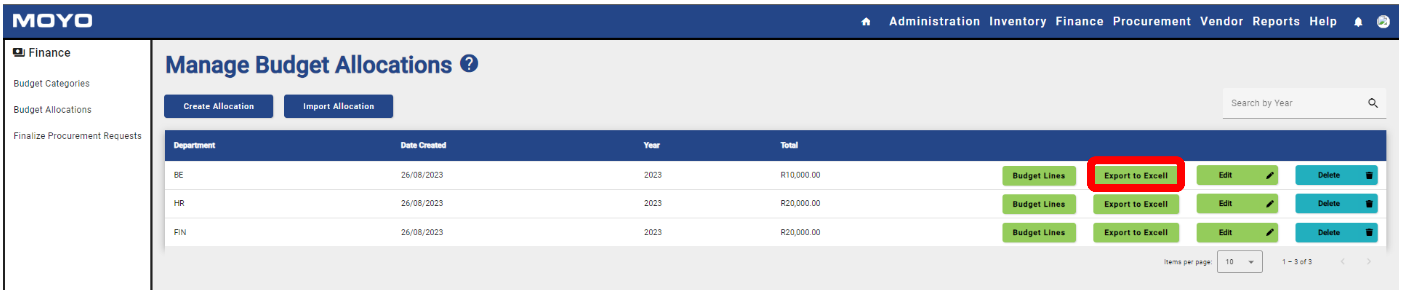


Figure 1 Click Export to Excel Button

**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.**

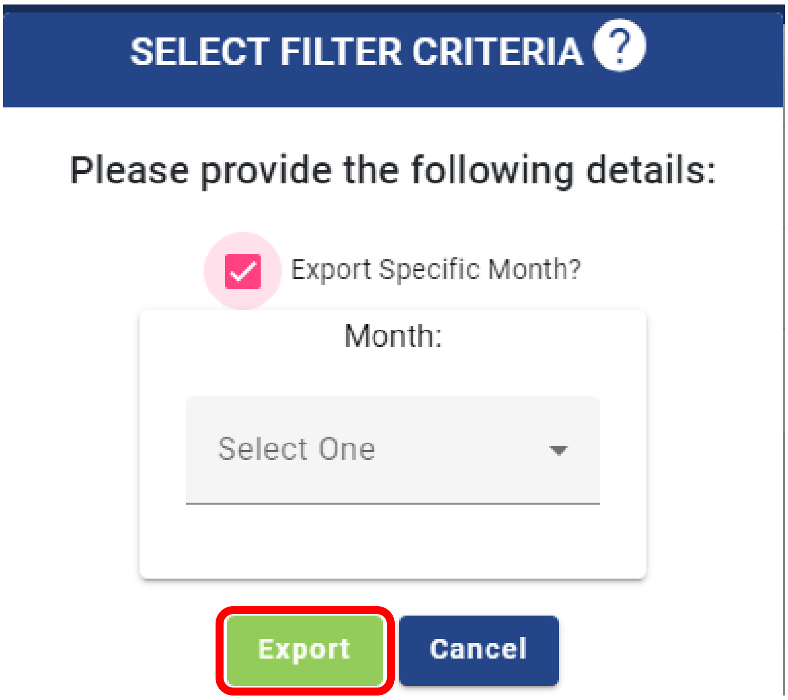


Figure 1 Click Export Button

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.**

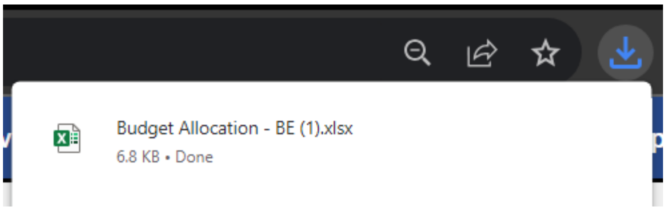


Figure 1 Download Excel File

**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)**

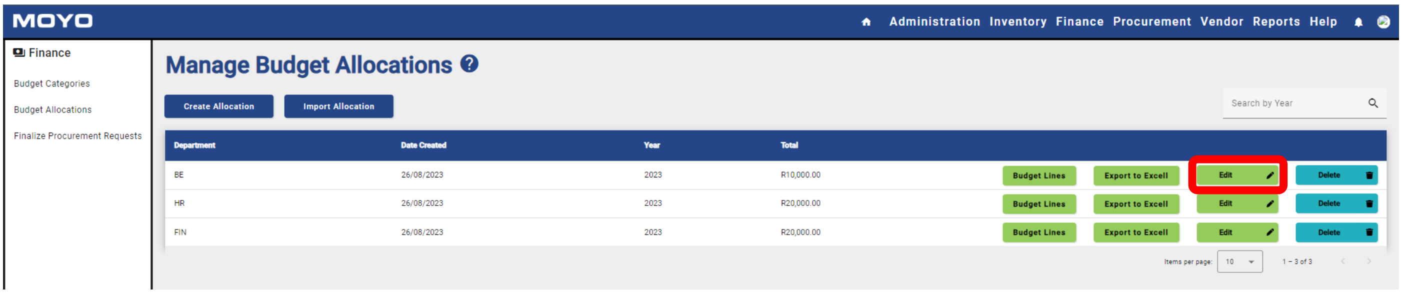


Figure 1 Click Edit Budget Allocation Button.

**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)**

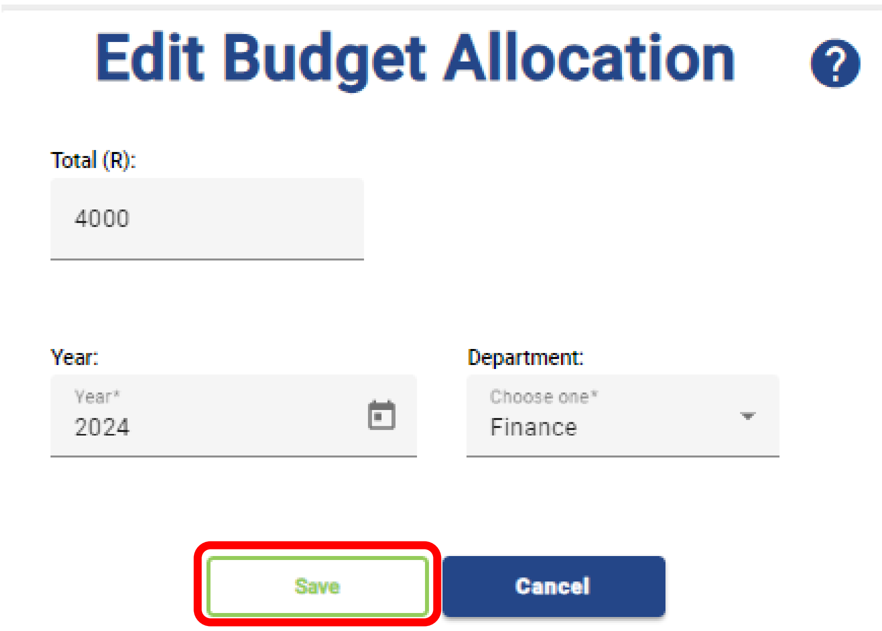


Figure 1 Click Save Edit Budget Allocation Button.

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)**

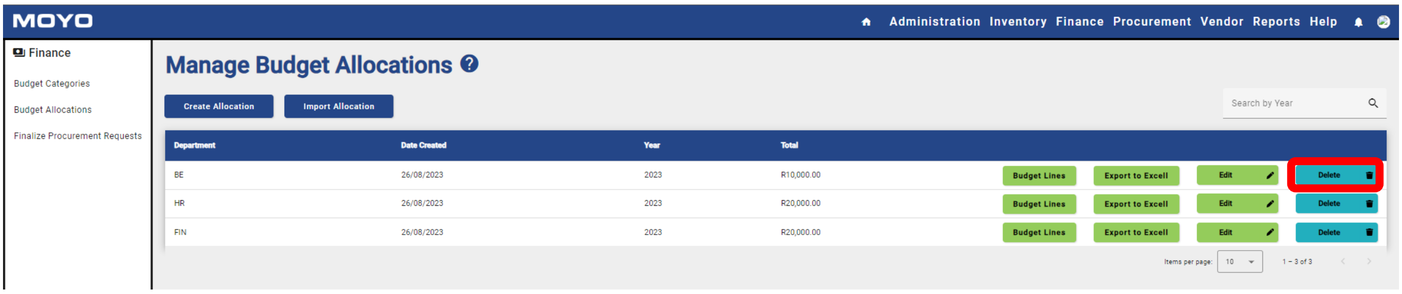


Figure 1 Click Delete Budget Allocation Button

**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.**

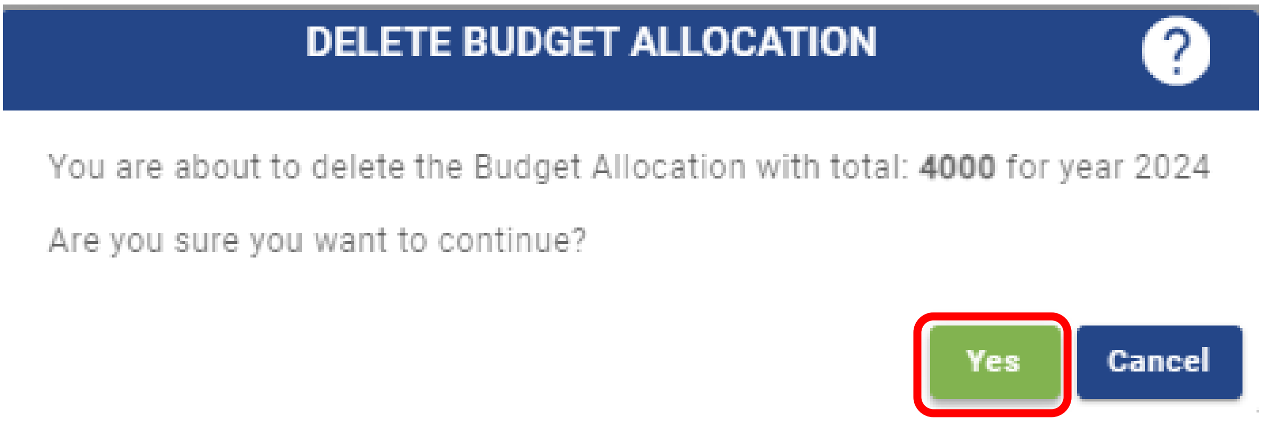


Figure 1 Click Yes Delete Budget Allocation Button

# 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:**

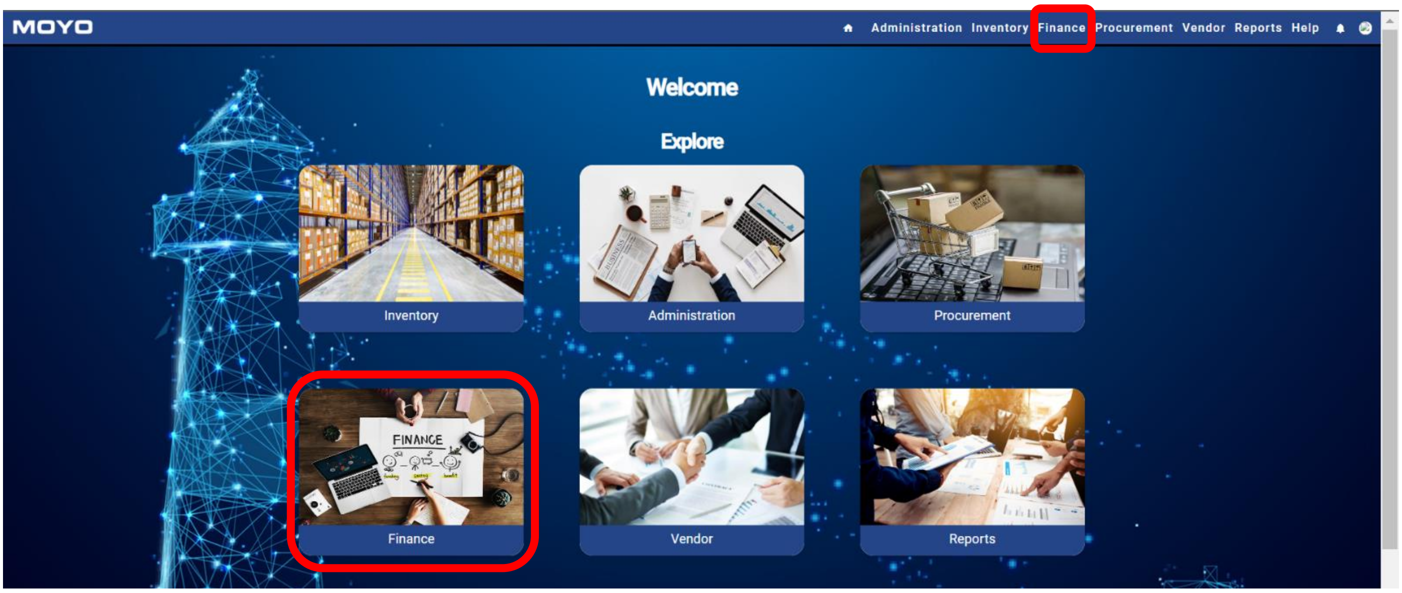


Figure 1 Home Screen to Budget Lines Screen

**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:**

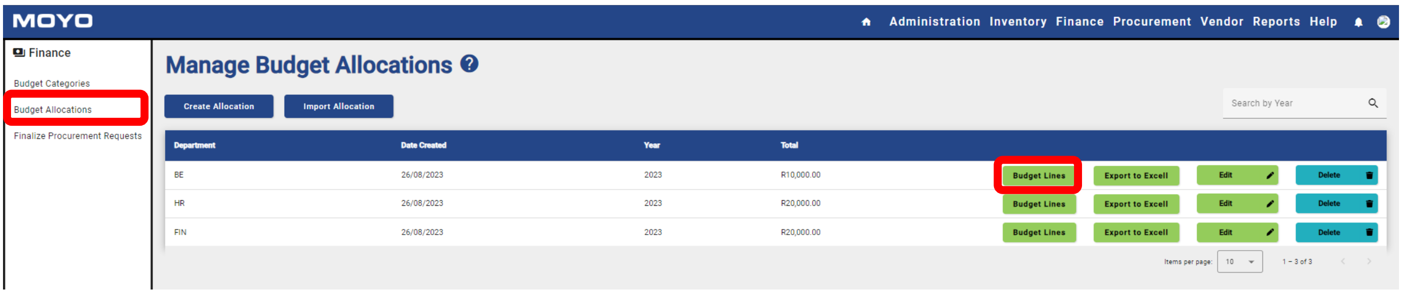


Figure 1 Finance side nav to Budget Lines Screen

## 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)**

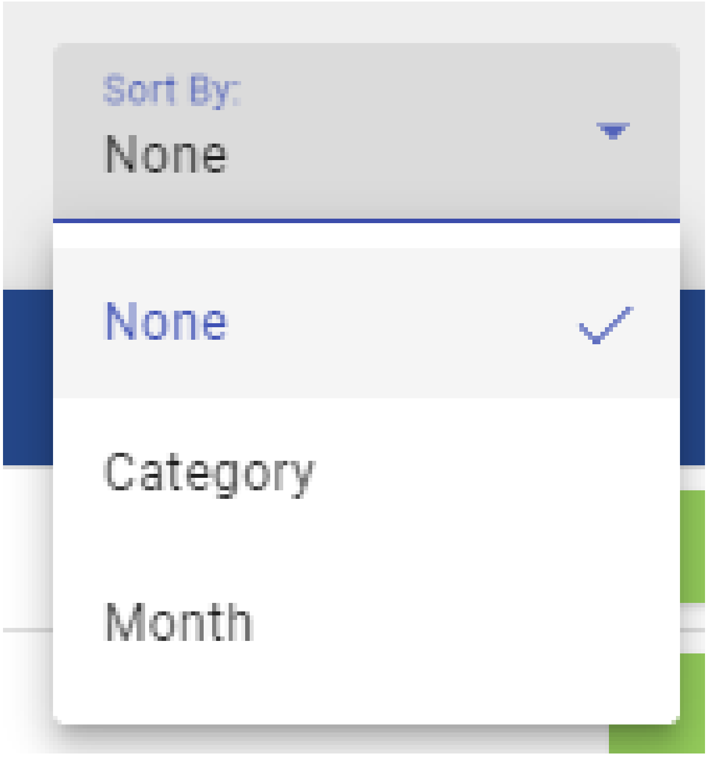


Figure 1 Filter Budget Line Button

- "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:**

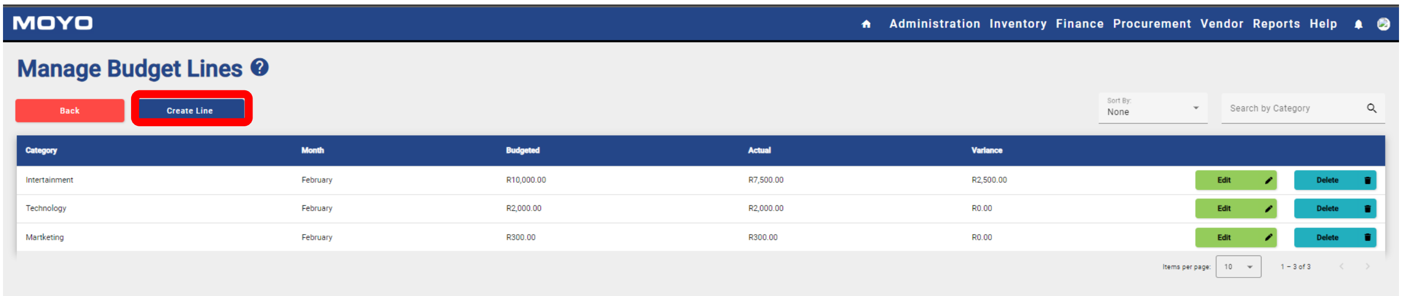


Figure 1 Click Create Budget Lines Button

**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.**

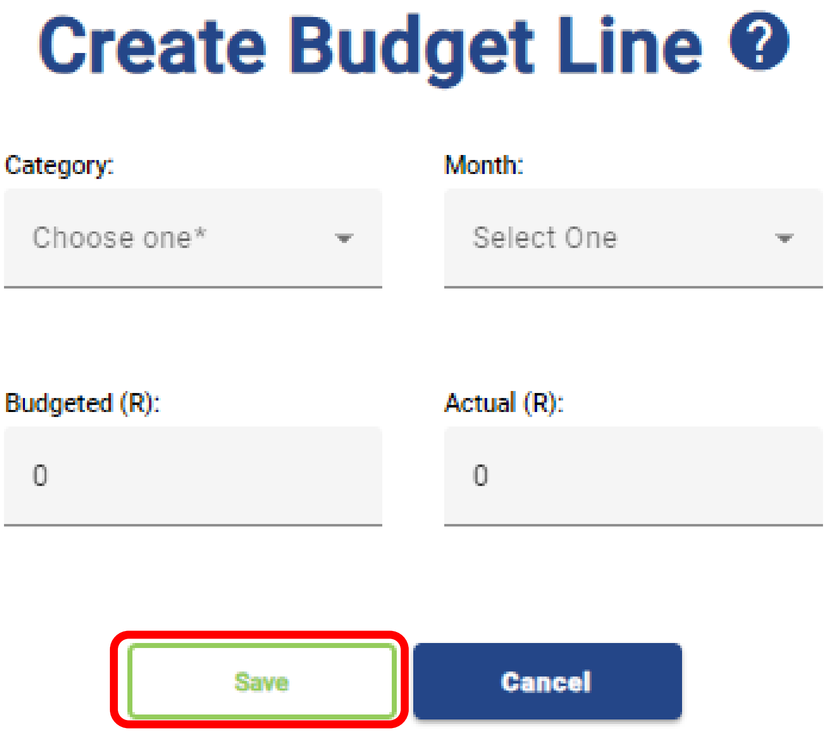


Figure 1 Click Save Create Budget Lines Button

1. "Category": Choose the category from the list of budget categories for the Budget Lines. (Compulsory)
2. "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)**

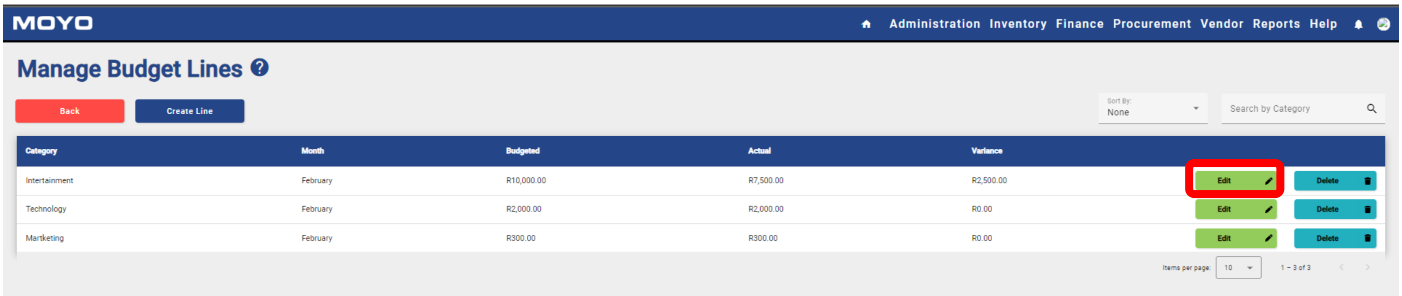


Figure 1 Click Edit Budget Lines Button.

**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)**

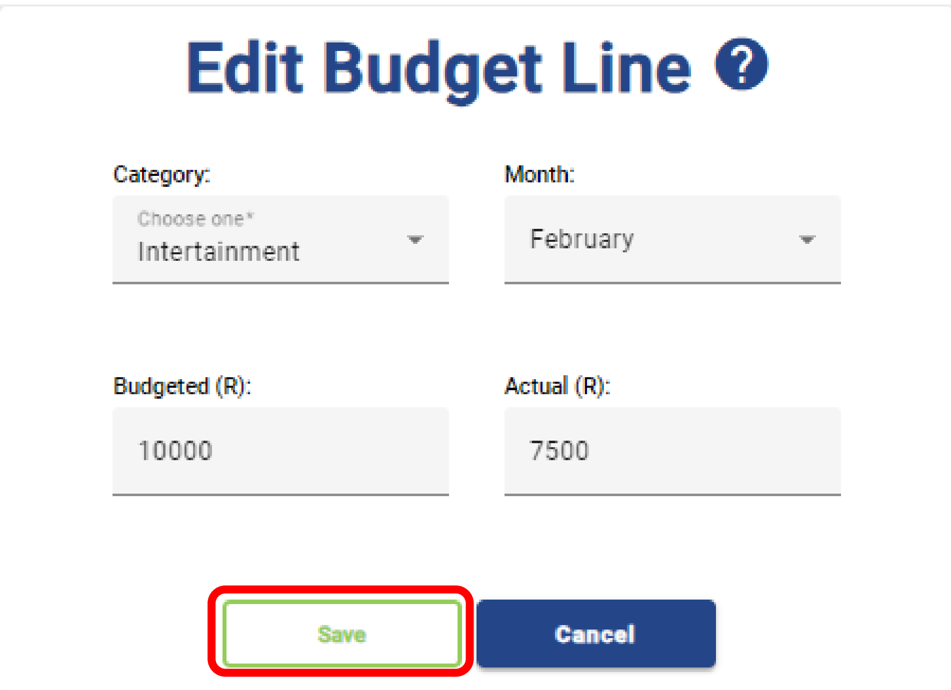


Figure 1 Click Save Edit Budget Lines Button.

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)**

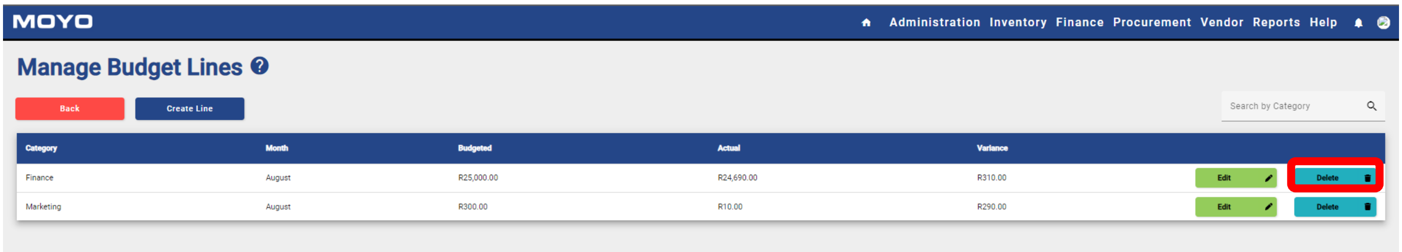


Figure 1 Click Delete Budget Allocation Lines

**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.**

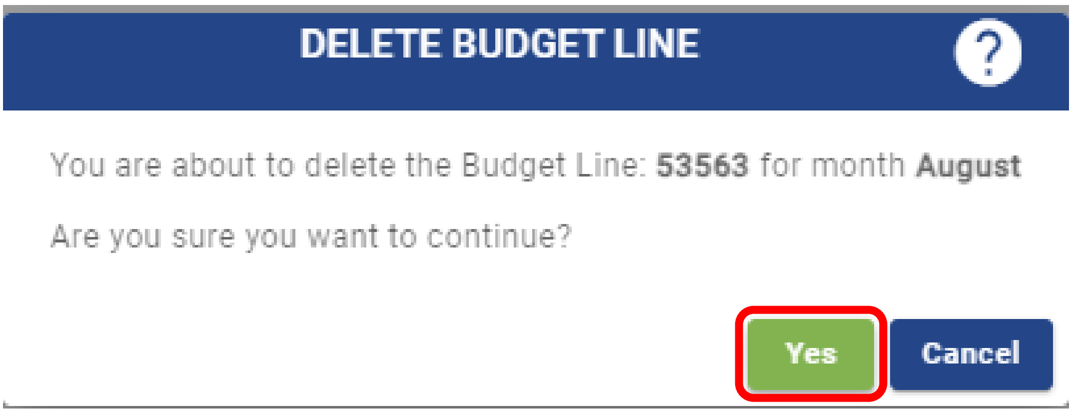


Figure 1 Click Yes Delete Budget Lines Button

# 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:**

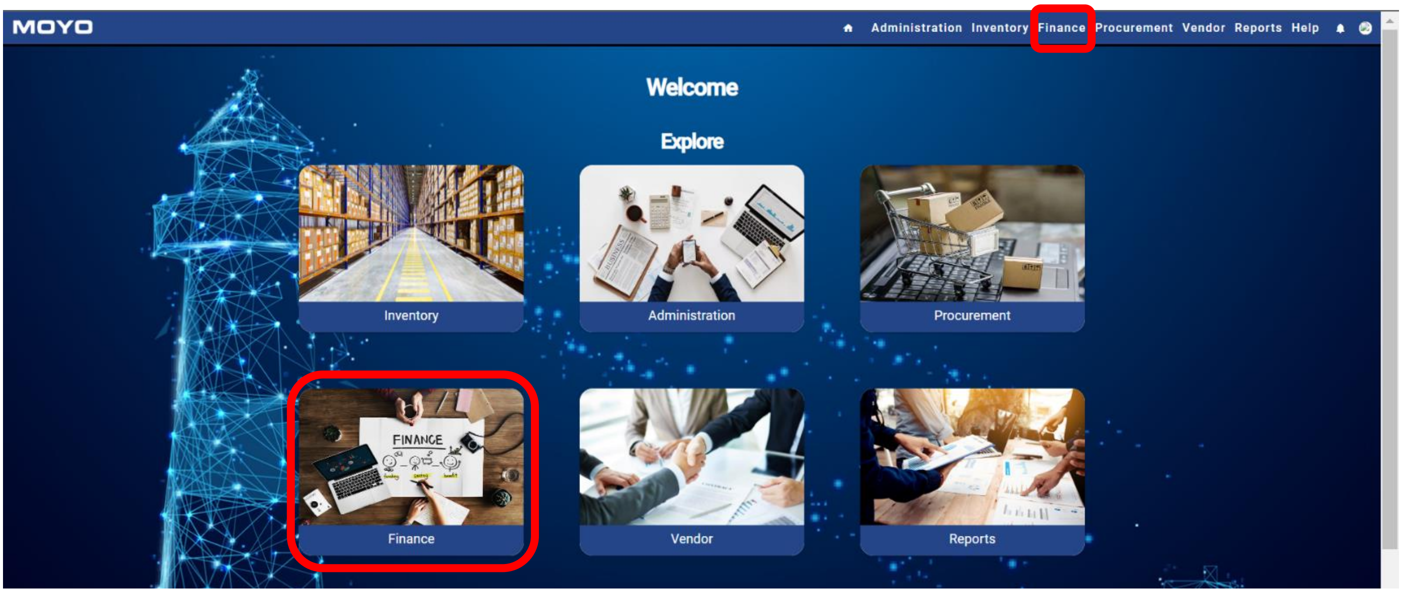


Figure 1 Home Screen to Budget Lines Screen

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

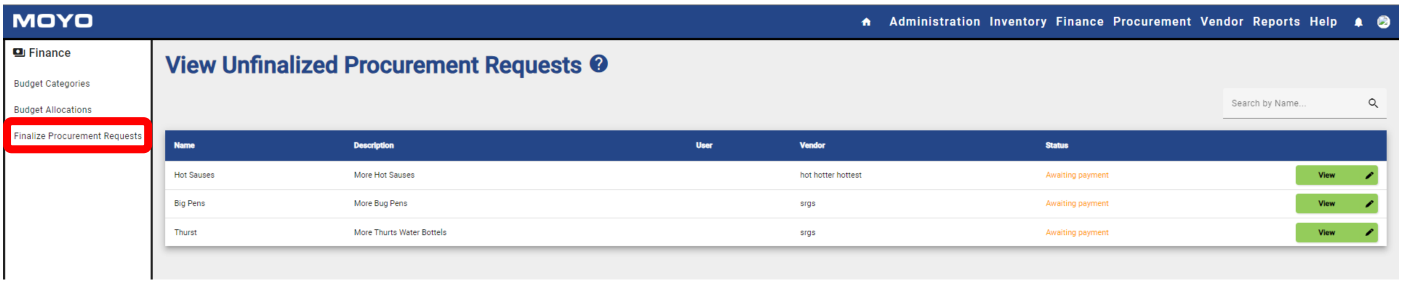


Figure 1 Finance side nav to Finalised Procurement Request Screen

## Step 2 Create Finalised Procurement Request:

**Create a Finalised Procurement Request by clicking on the "View" button on the Finalised Procurement Request screen:**

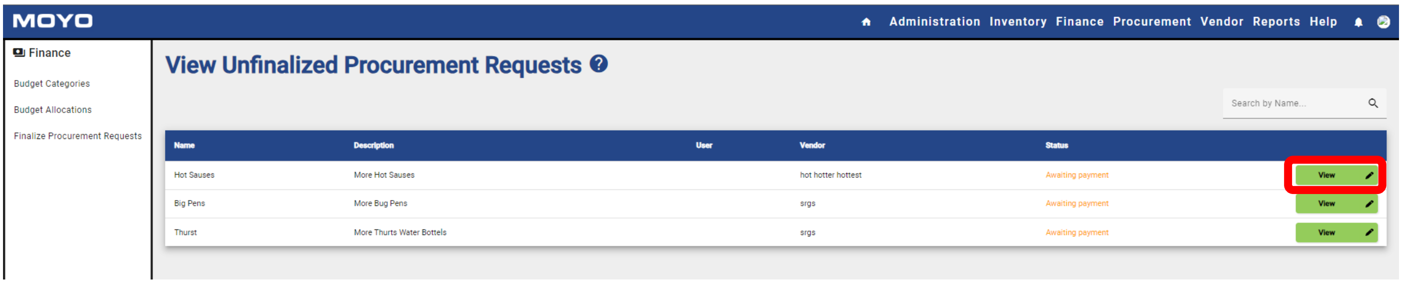


Figure 1 Click Create Finalised Procurement Request Button

**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.**

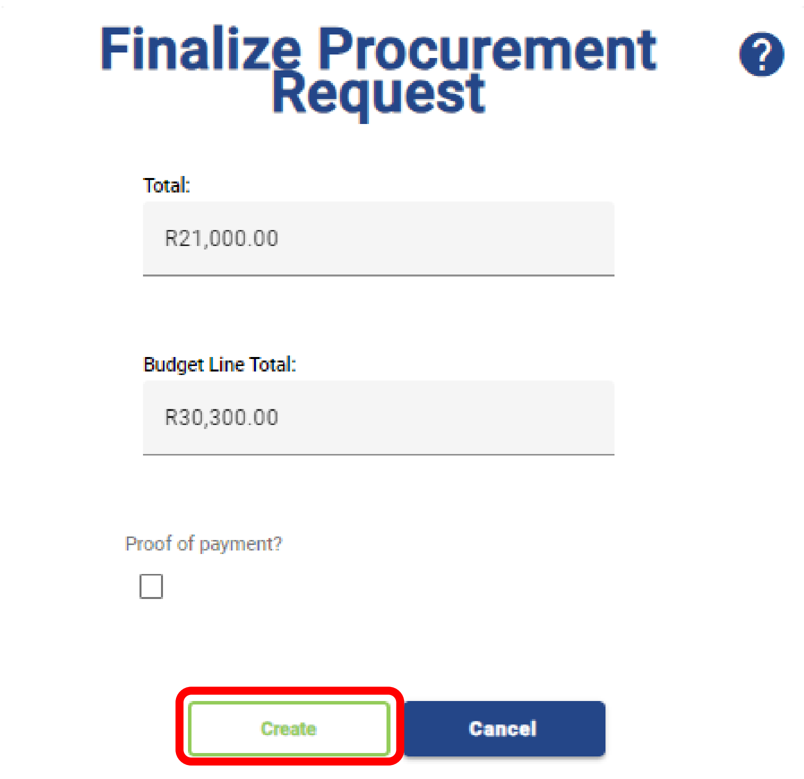


Figure 1 Click Create Finalised Procurement Request Button

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.

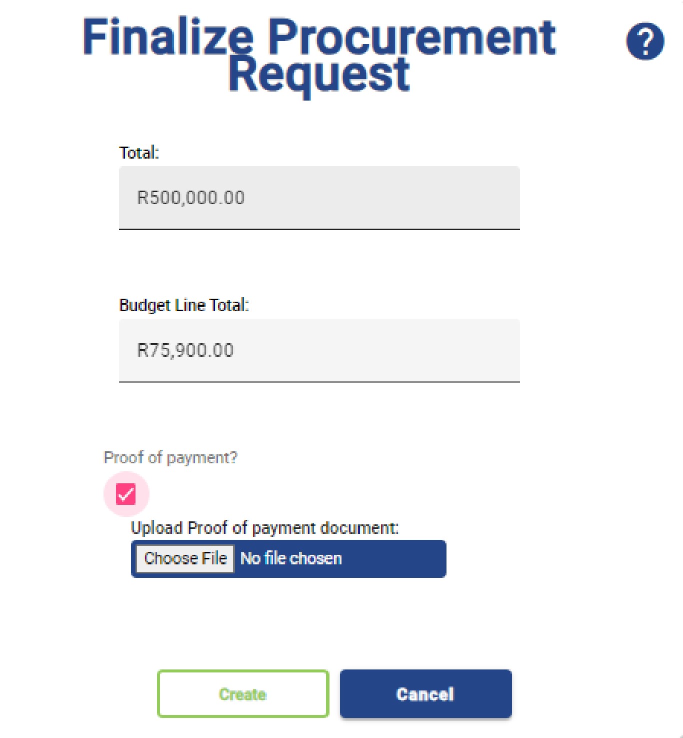


Figure 1 Create Finalised Procurement Request with checkbox Screen.

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 Sauses | More Hot Sauses | | hot hotter hottest | Awaiting payment | View |
| Big Pens | More Bug Pens | | srgs | Awaiting payment | View |
| Thurst | More Thurts Water Bottels | | srgs | Awaiting payment | View |

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:**

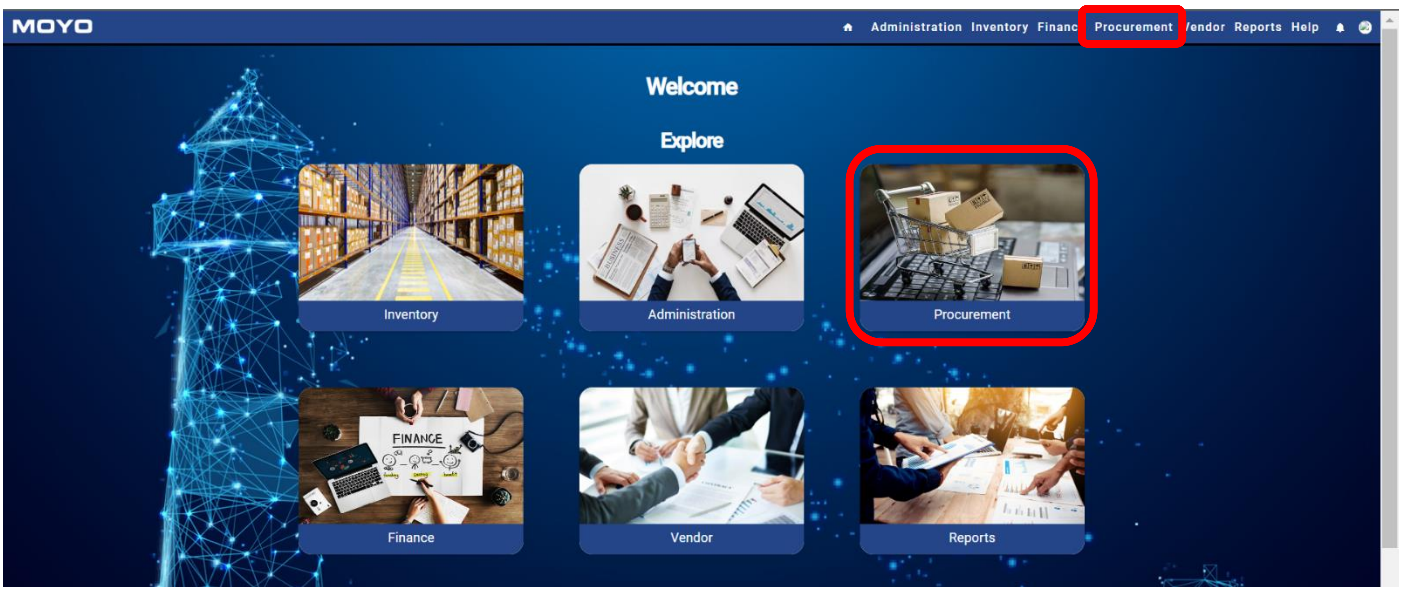


Figure 1 Home Screen to Procurement Request Screen

**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)**

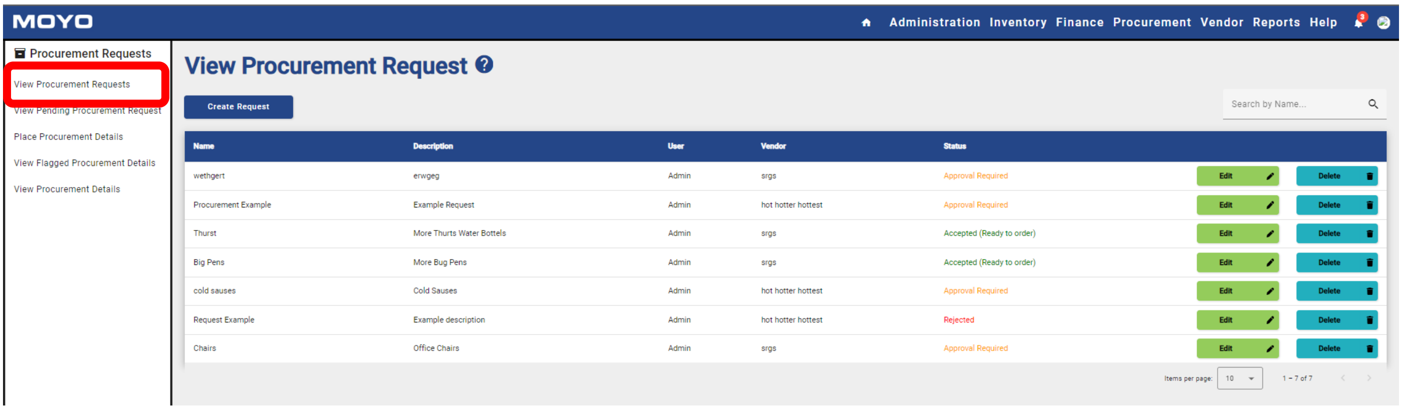


Figure 1 Procurement side nav to Procurement Request Screen

## Step 2 Create Procurement Request:

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

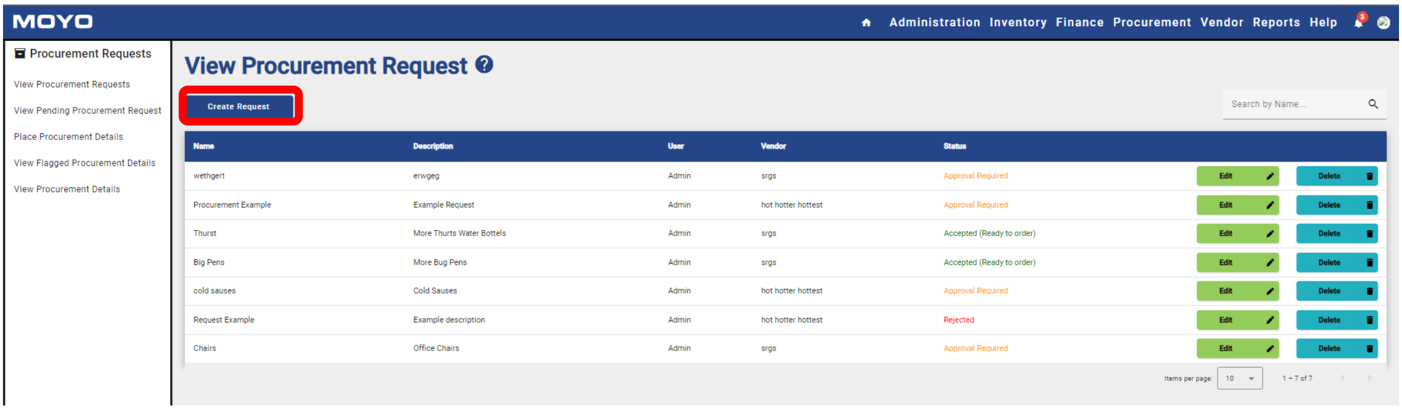


Figure 1 Click Create Procurement Request Button

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

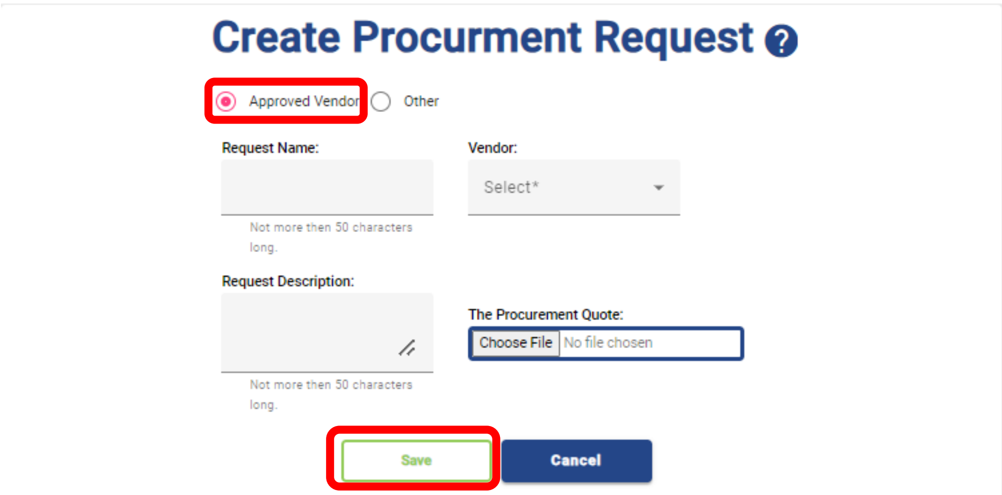


Figure 1 Click Save Procurement Request Button Approved Vendor

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

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

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

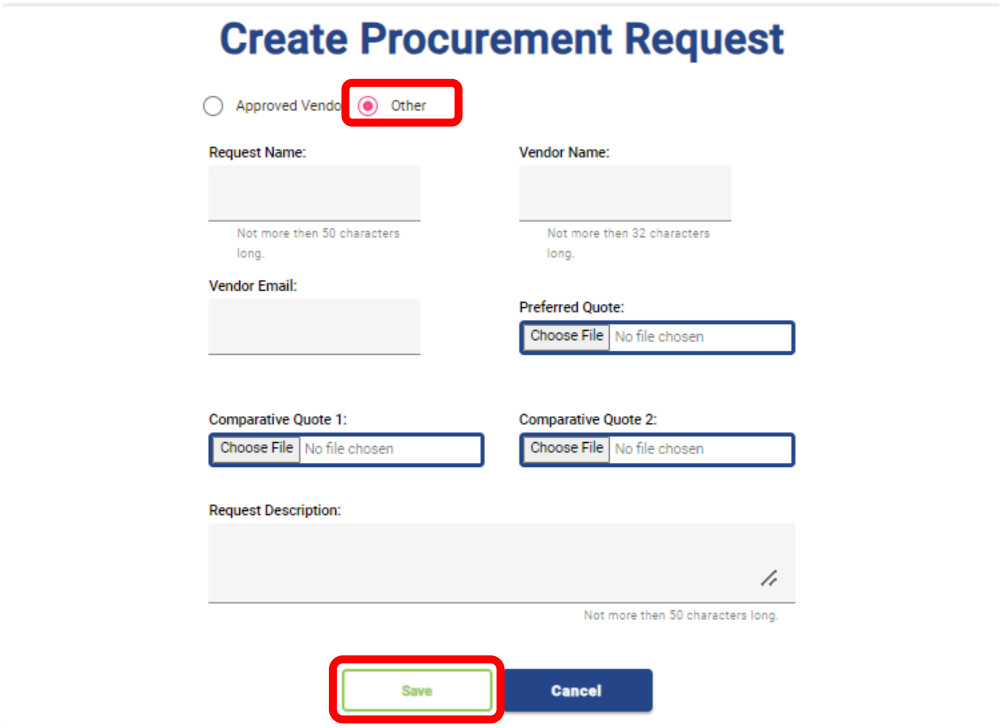


Figure 1 Click Create Procurement Request Button Other

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

## 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)**

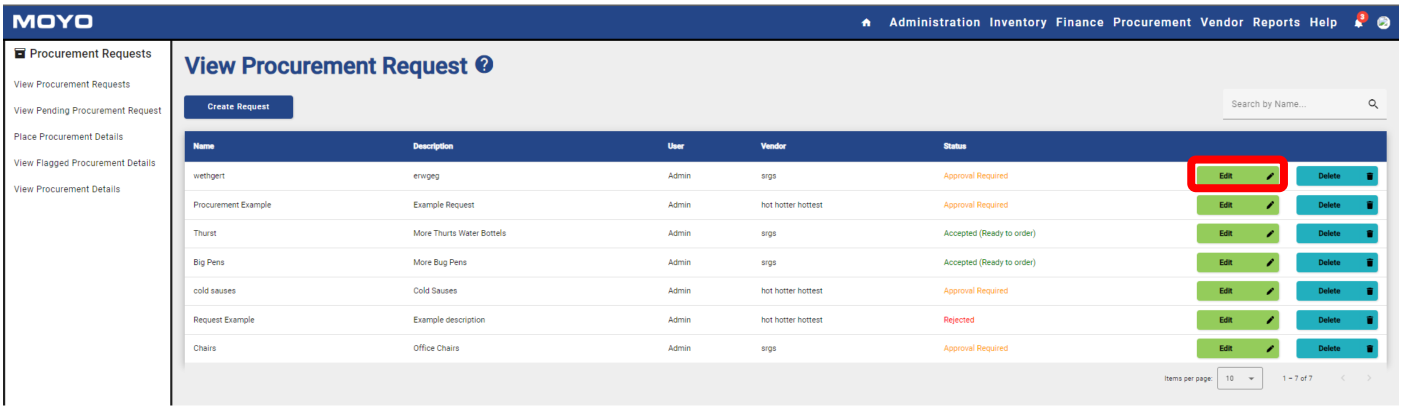


Figure 1 Click Edit Procurement Request Button.

**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.**

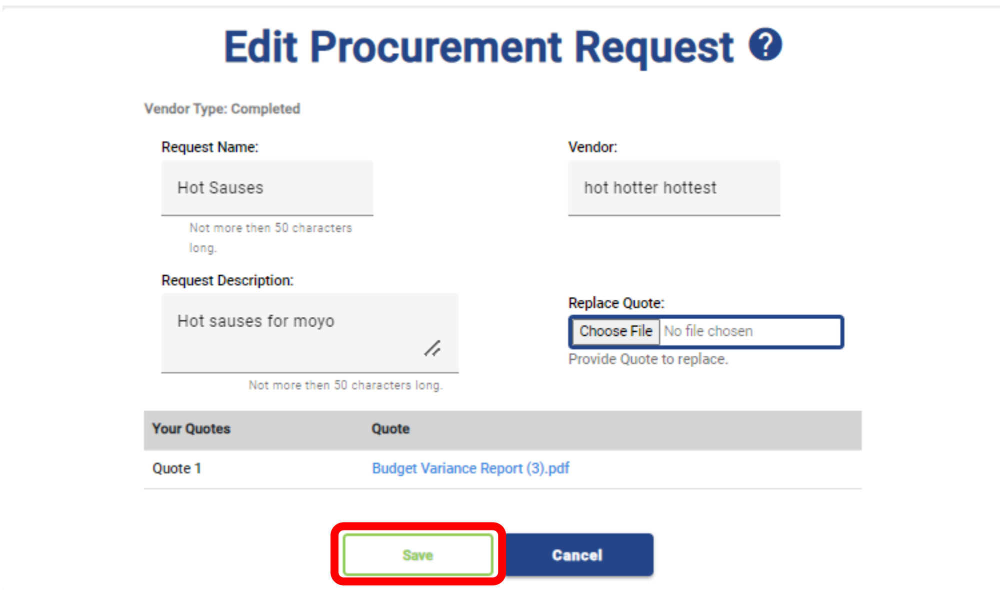


Figure 1 Click Save Edit Procurement Request Button Approved Vendor

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.**

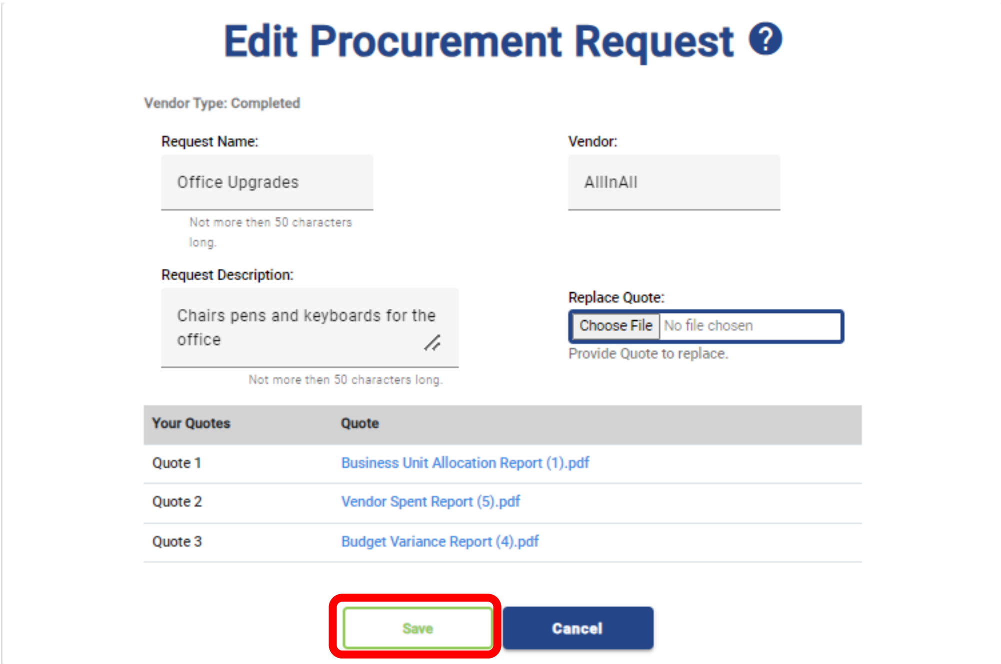

Figure 1 Click Update Edit Onboard Request Button Sole Supplier

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)**

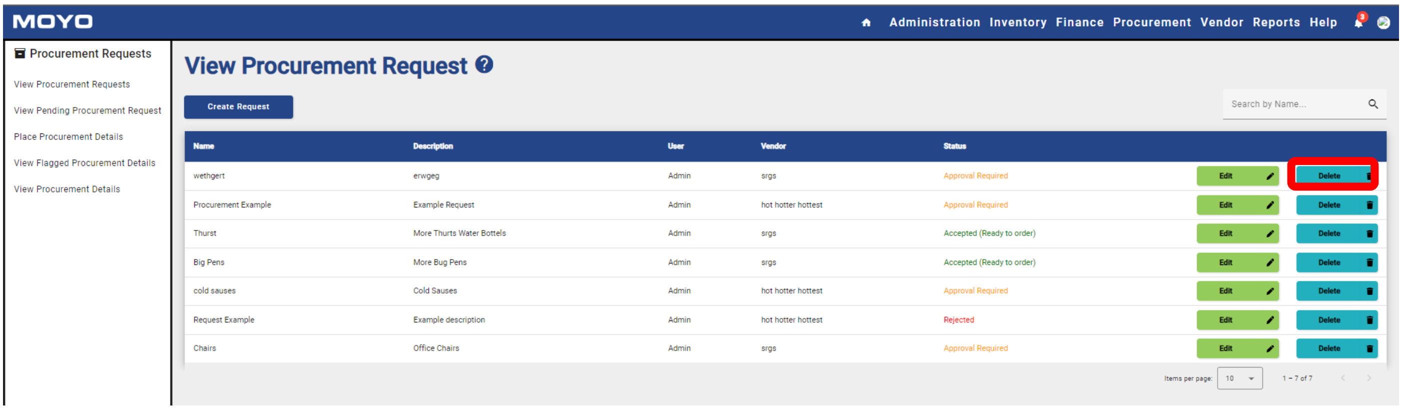


Figure 1 Click Delete Procurement Request Button

**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.**

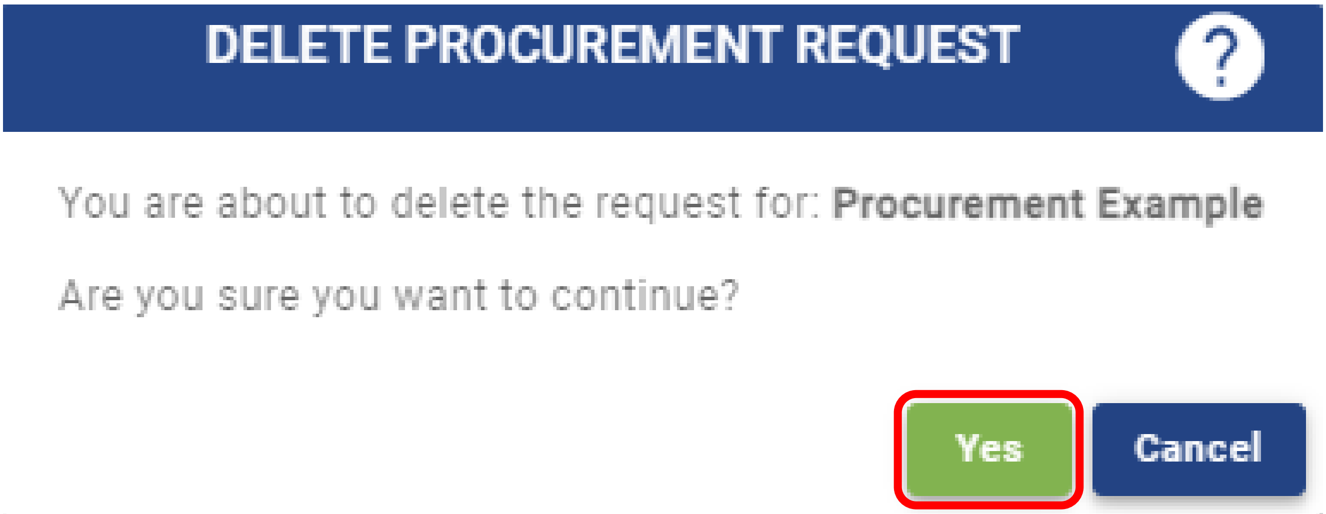


Figure 1 Click Yes Delete Procurement Request Button

## Explanation of the Procurement Request statuses:

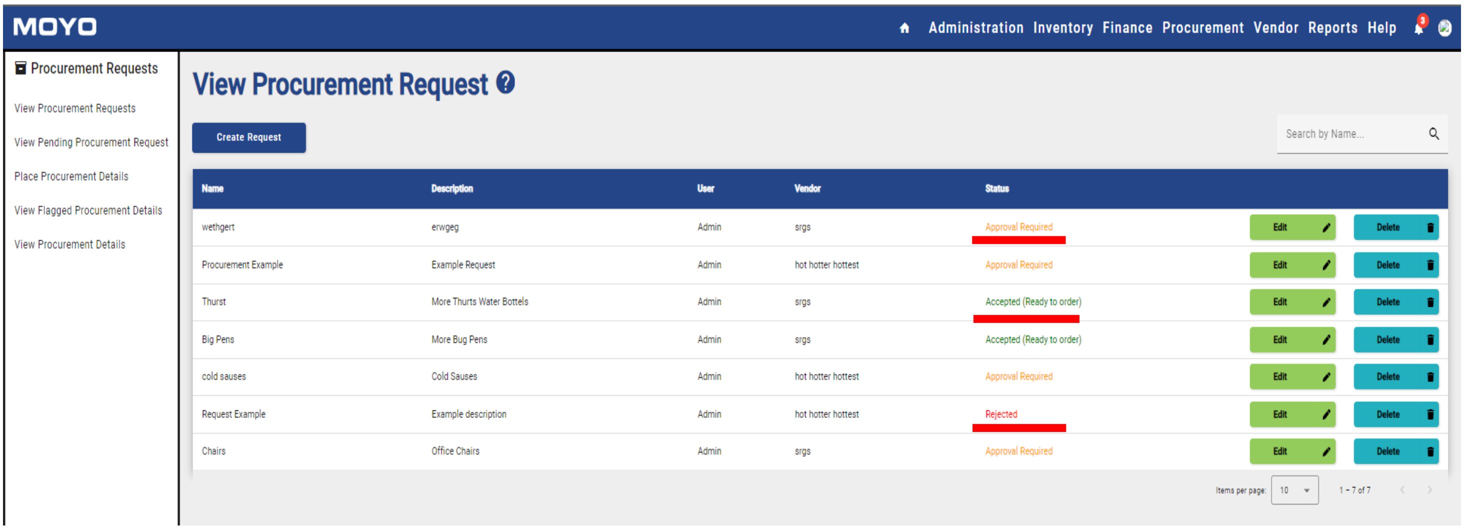


Figure 1 Procurement Request Status

- 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:**

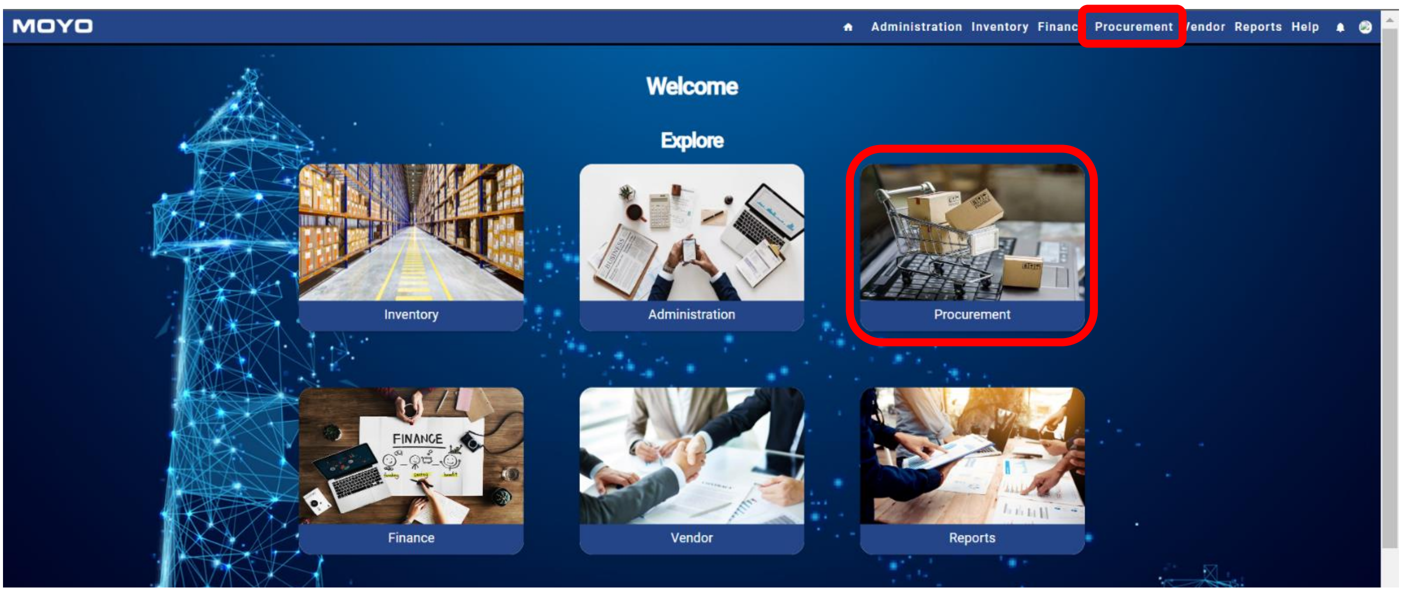


Figure 1 Home Screen to Pending Procurement Request Screen

**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 Requestes of there allocated Department, thus also being the only ones able to approve or reject a procurement request.)**

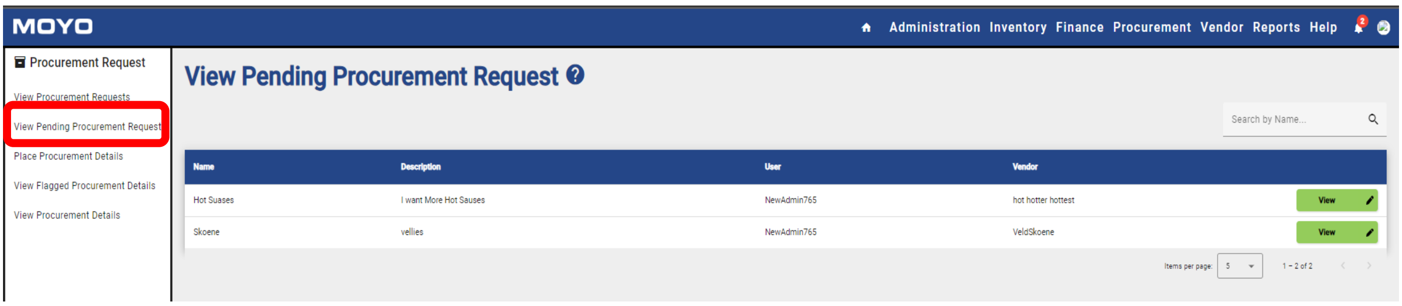


Figure 1 Procurement side nav to Pending Procurement Request Screen

## Step 2 Approve Pending Procurement Request:

**Approve the Pending Procurement Request by clicking on the "View" button on the Pending Procurement Request screen:**

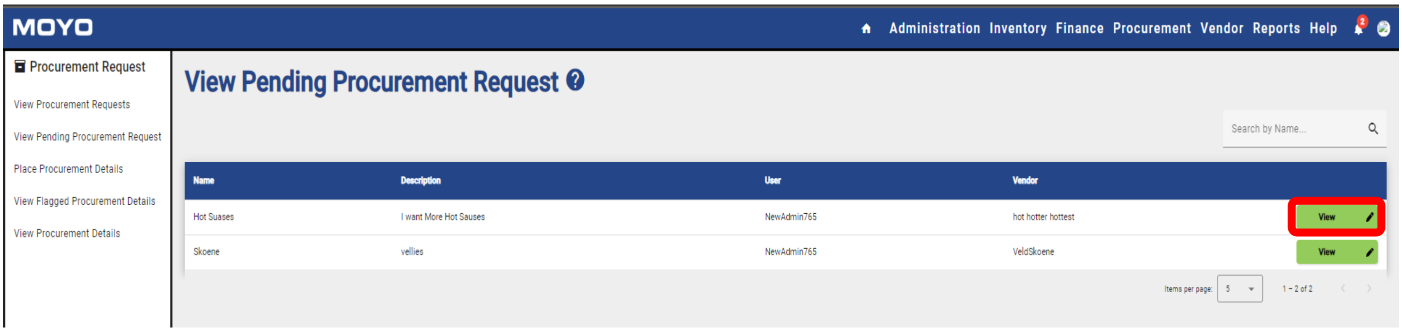


Figure 1 Click View Pending Procurement Request Button

**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)**

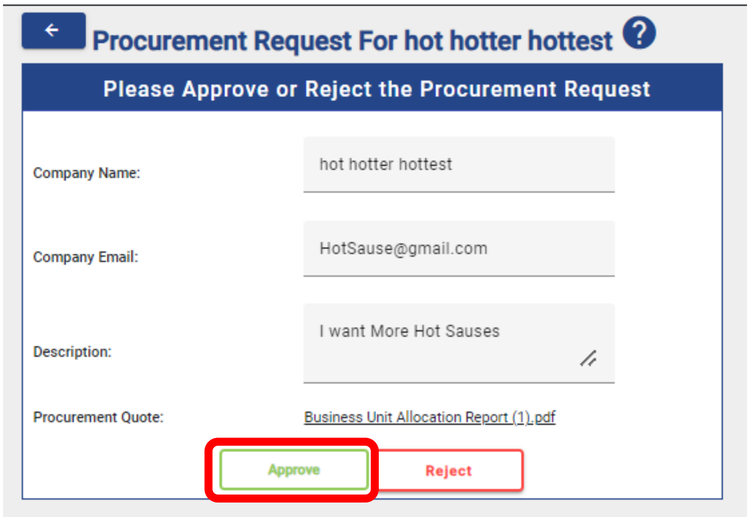


Figure 1 Click Approve Procurement Request Button Approved Vendor

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

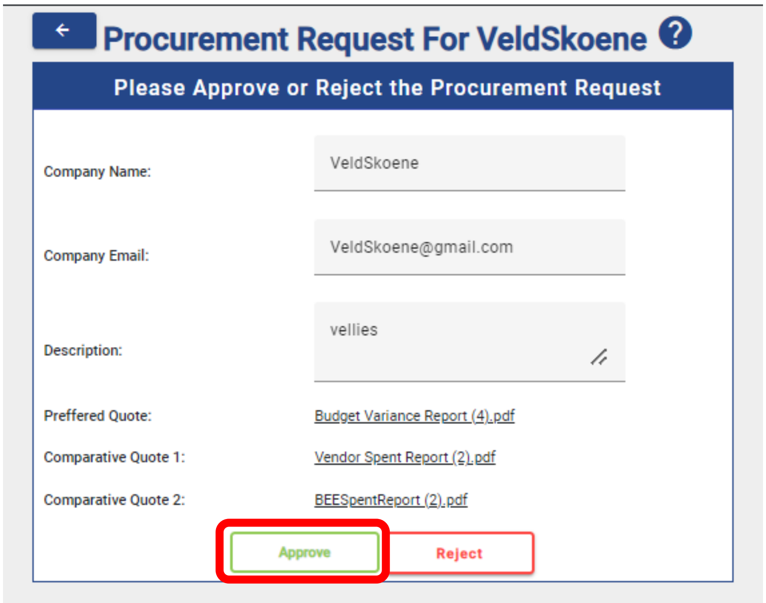


Figure 1 Click Approve Procurement Request Button Other Vendor

## Step 3 Reject Pending Procurement Request:

**Reject the Pending Procurement Request by clicking on the "View" button on the Pending Procurement Request screen:**

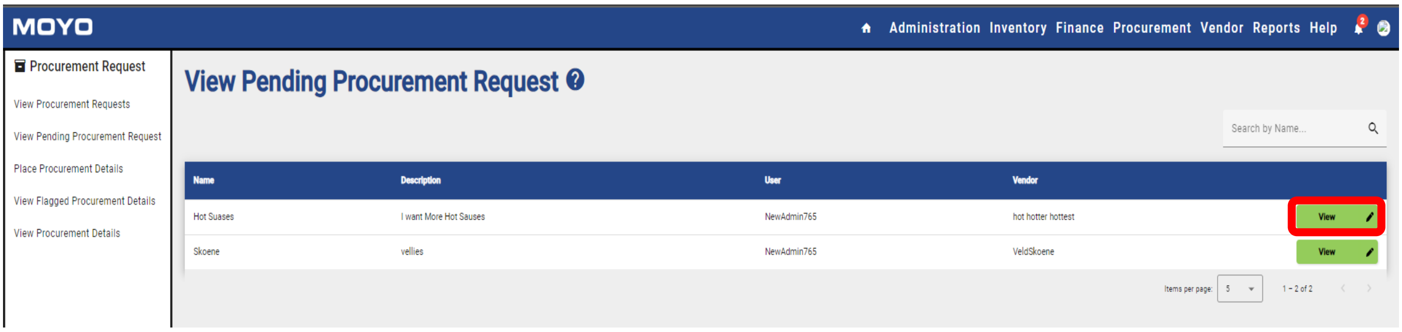


Figure 1 Click View Pending Procurement Request Button

**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)**

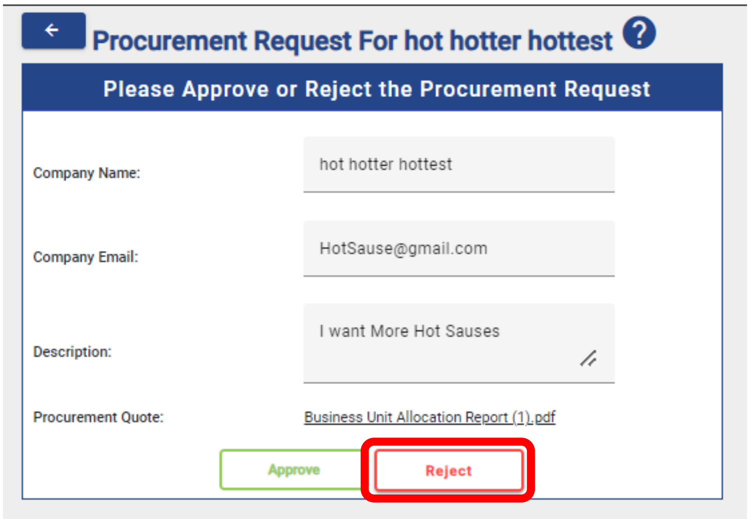


Figure 1 Click Reject Procurement Request Button Approved Vendor

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

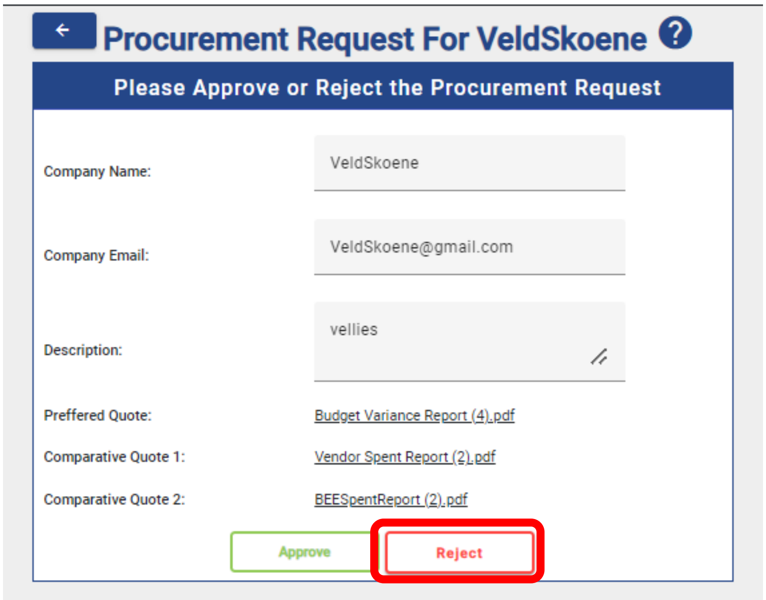


Figure 1 Click Reject Procurement Request Button Other Vendor

# 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:**

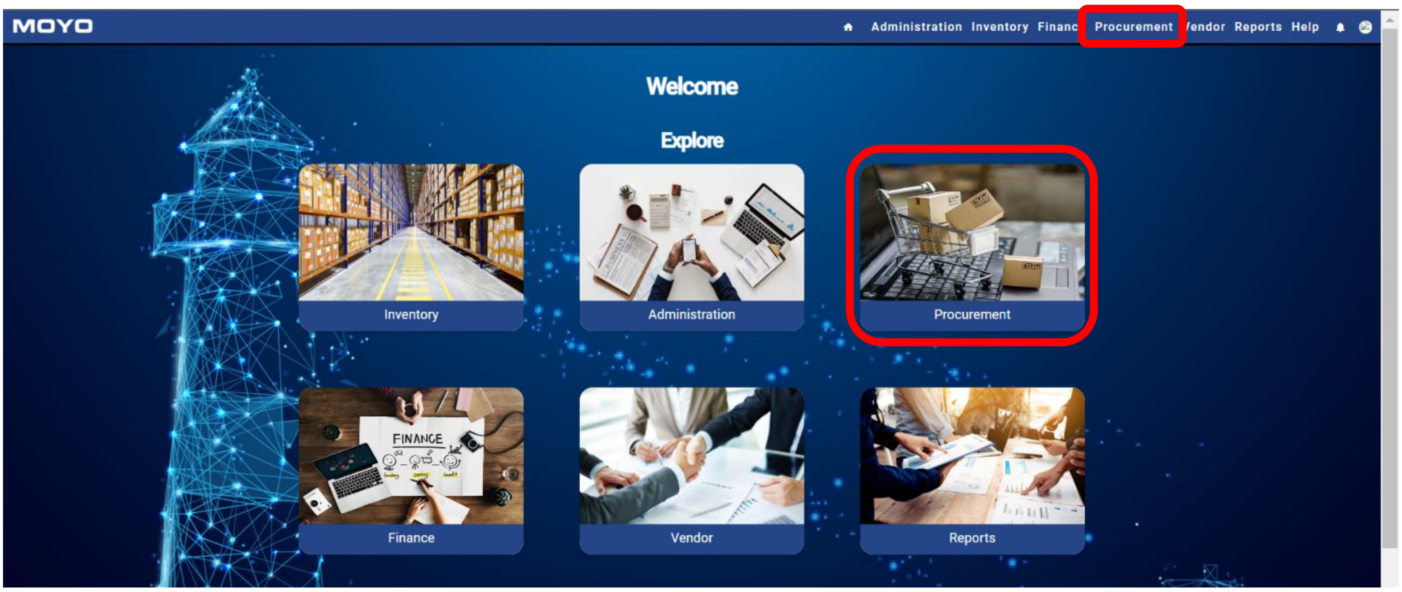


Figure 1 Home Screen to Place Procurement Details Screen

**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)**

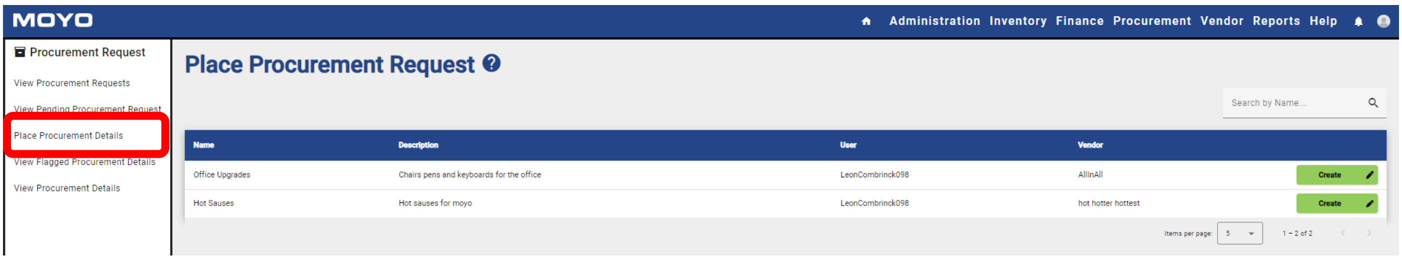


Figure 1 Procurement side nav to Place Procurement Details Screen

## Step 2 Place Procurement Details:

**Place a new Procurement Details request by clicking on the "Create" button on the Place Procurement Details screen:**

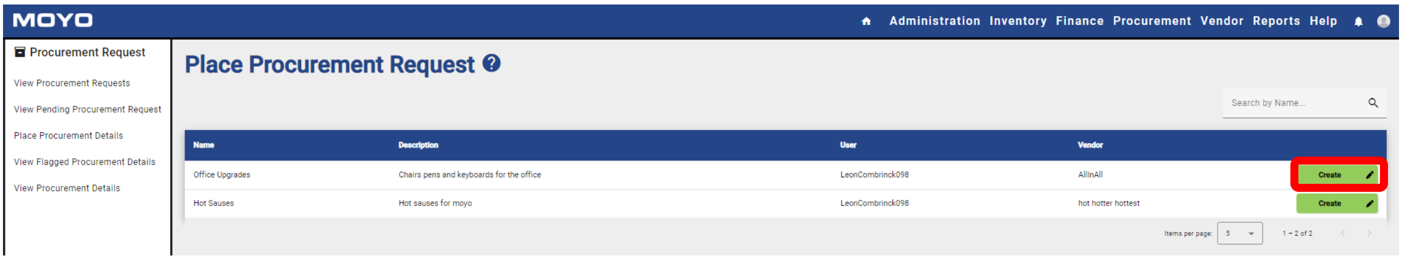


Figure 1 Click Create Place Procurement Details Button

**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)**

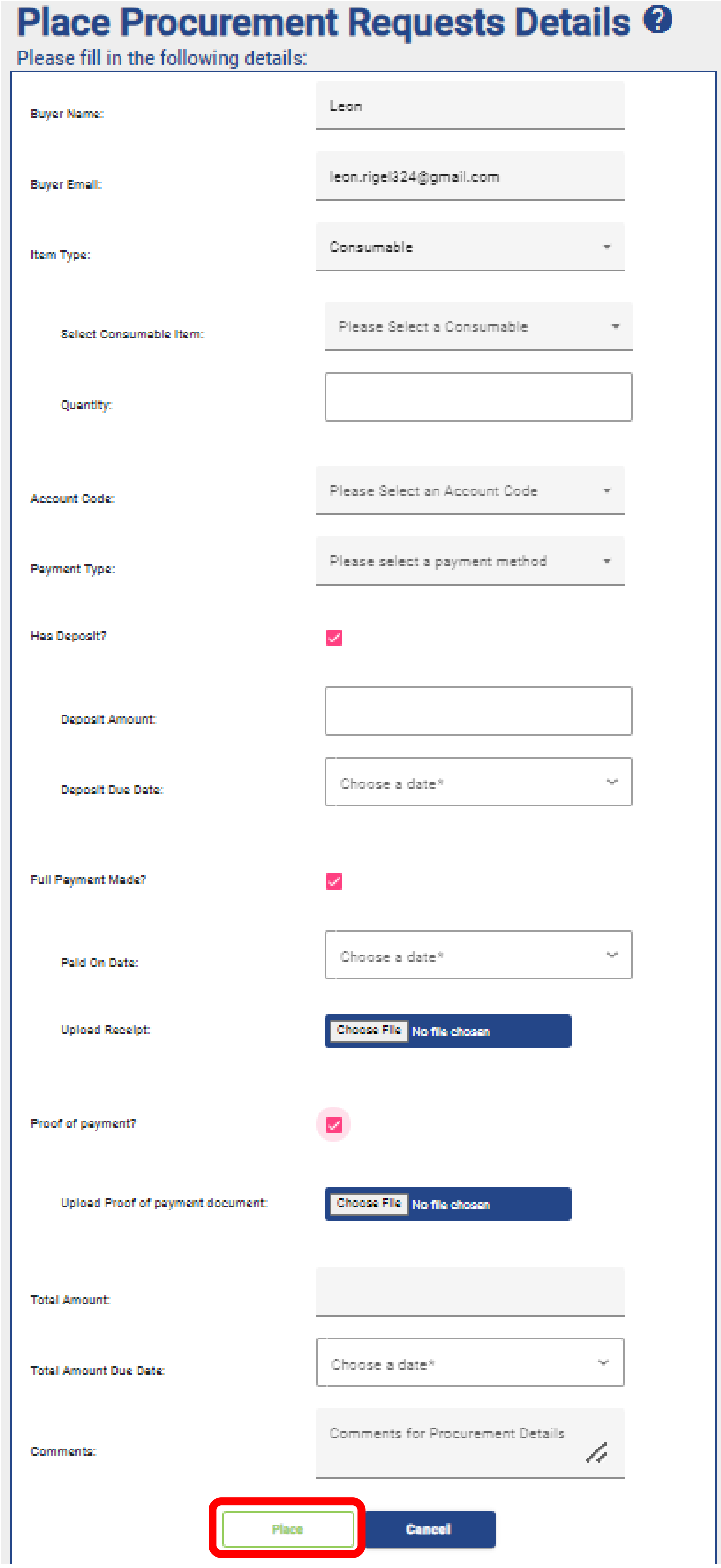


Figure 1 Click Place Procurement Request Button Consumable

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 datils. (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)**

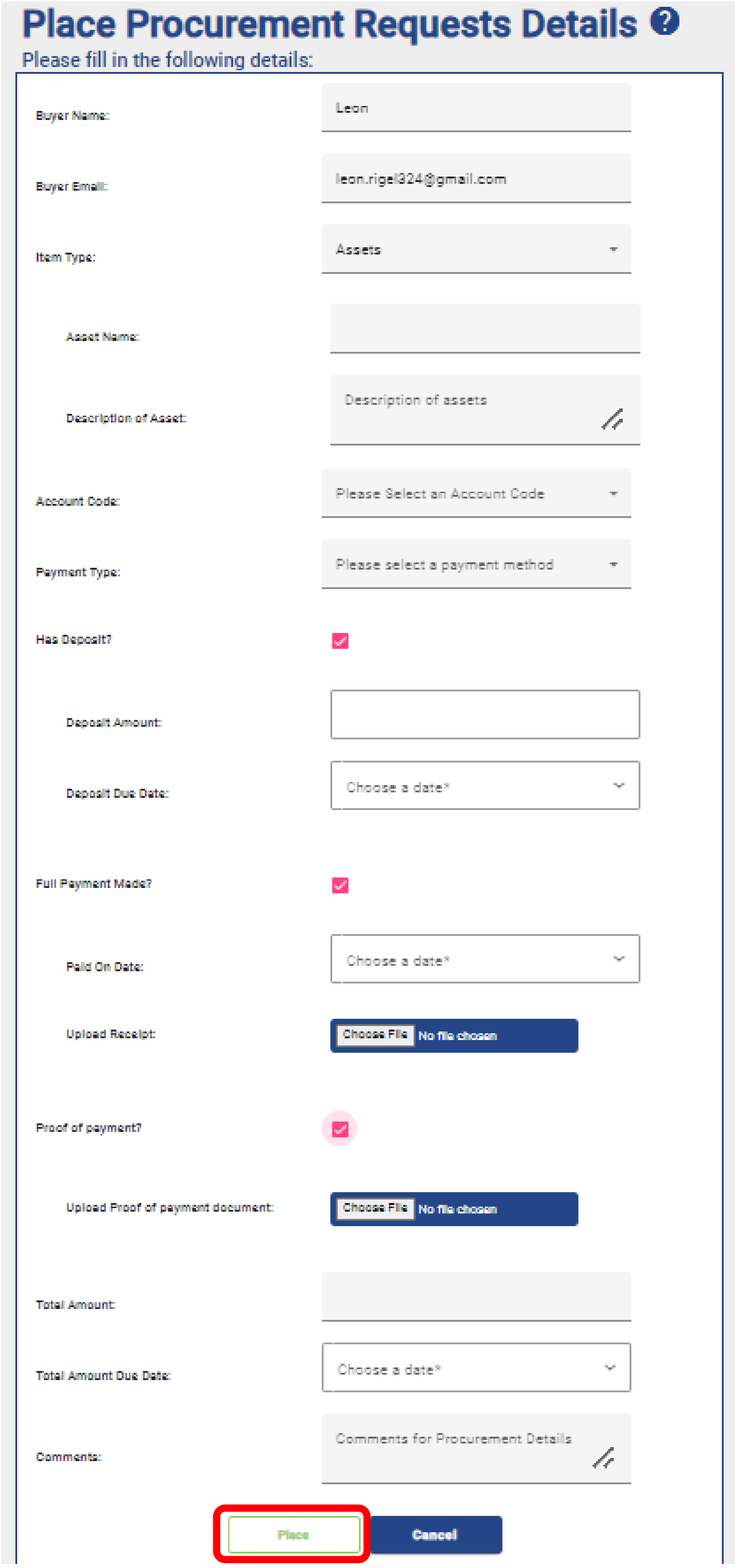


Figure 1 Click Place Procurement Request Button Asset

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:**

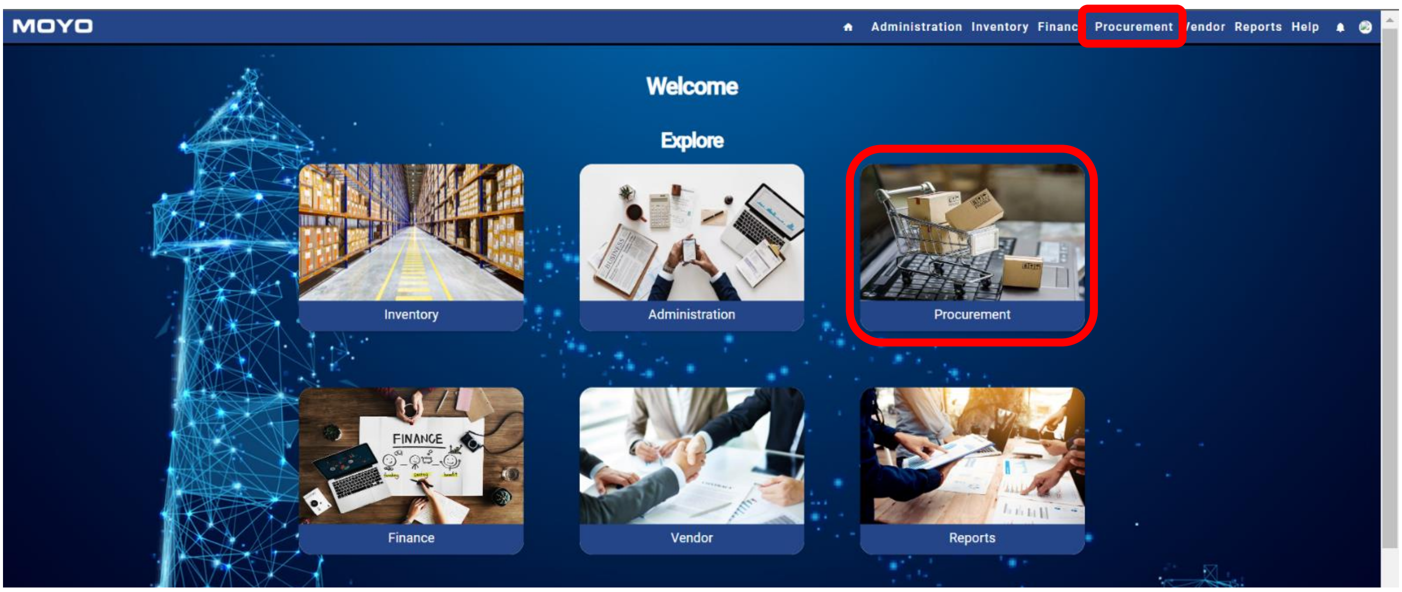


Figure 1 Home Screen to Flagged Procurement Details Screen

**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])**

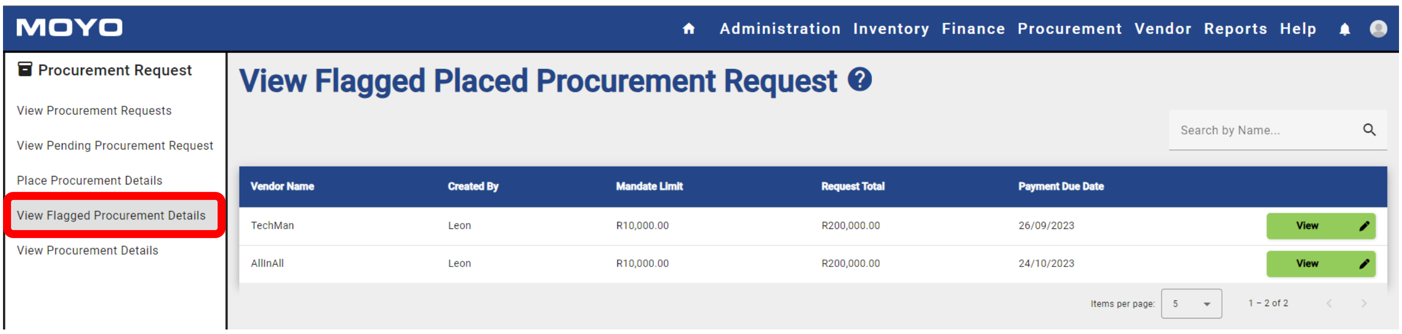


Figure 1 Procurement side nav to Flagged Procurement Details Screen

## Step 2 Accept Flagged Procurement Details:

**Accept a Flagged Procurement Details request by clicking on the "View" button on the Flagged Procurement Details screen:**

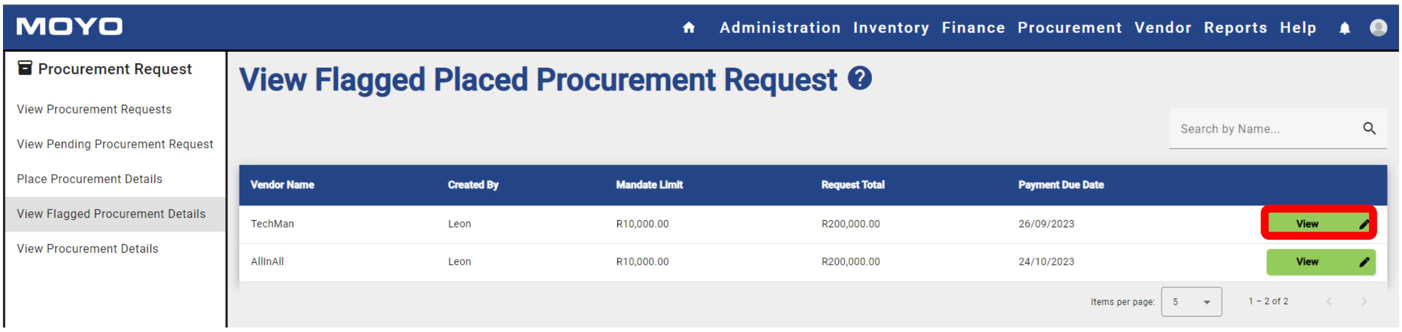


Figure 1 Click View Flagged Procurement Details Button Accept

**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.**

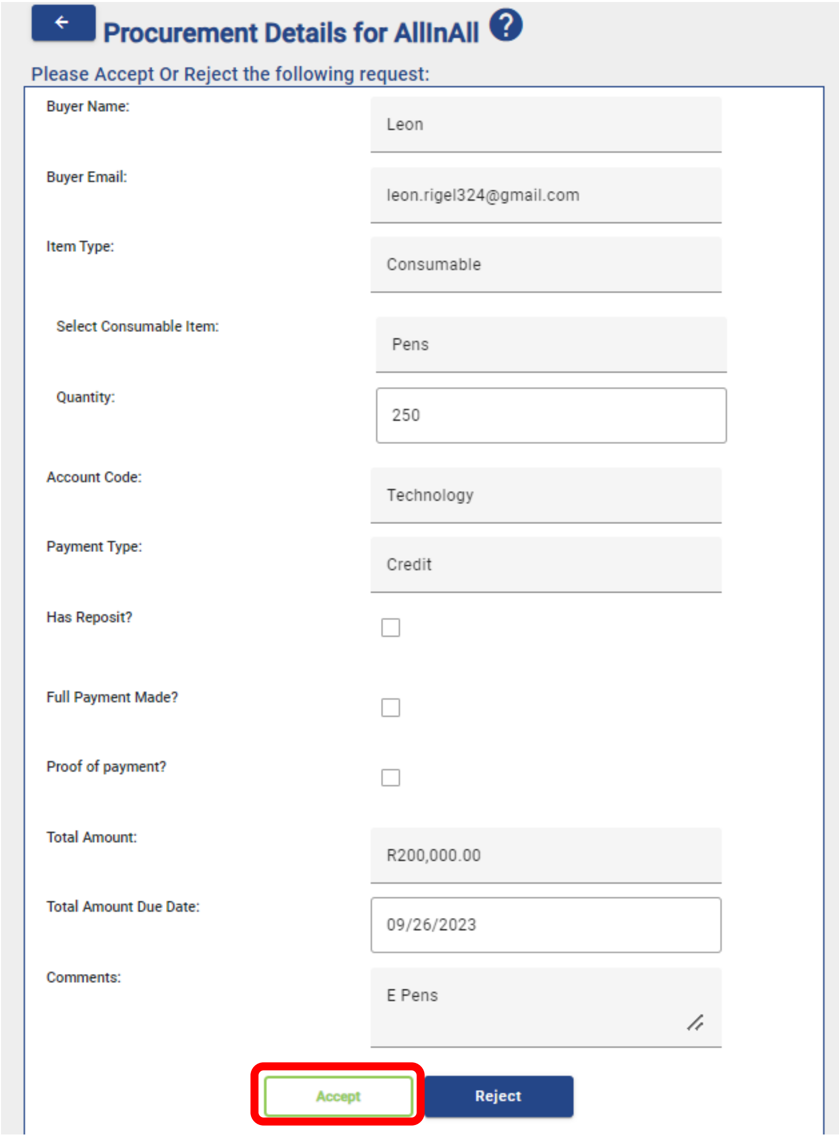


Figure 1 Click Accept Flagged Procurement Request Button Consumable

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

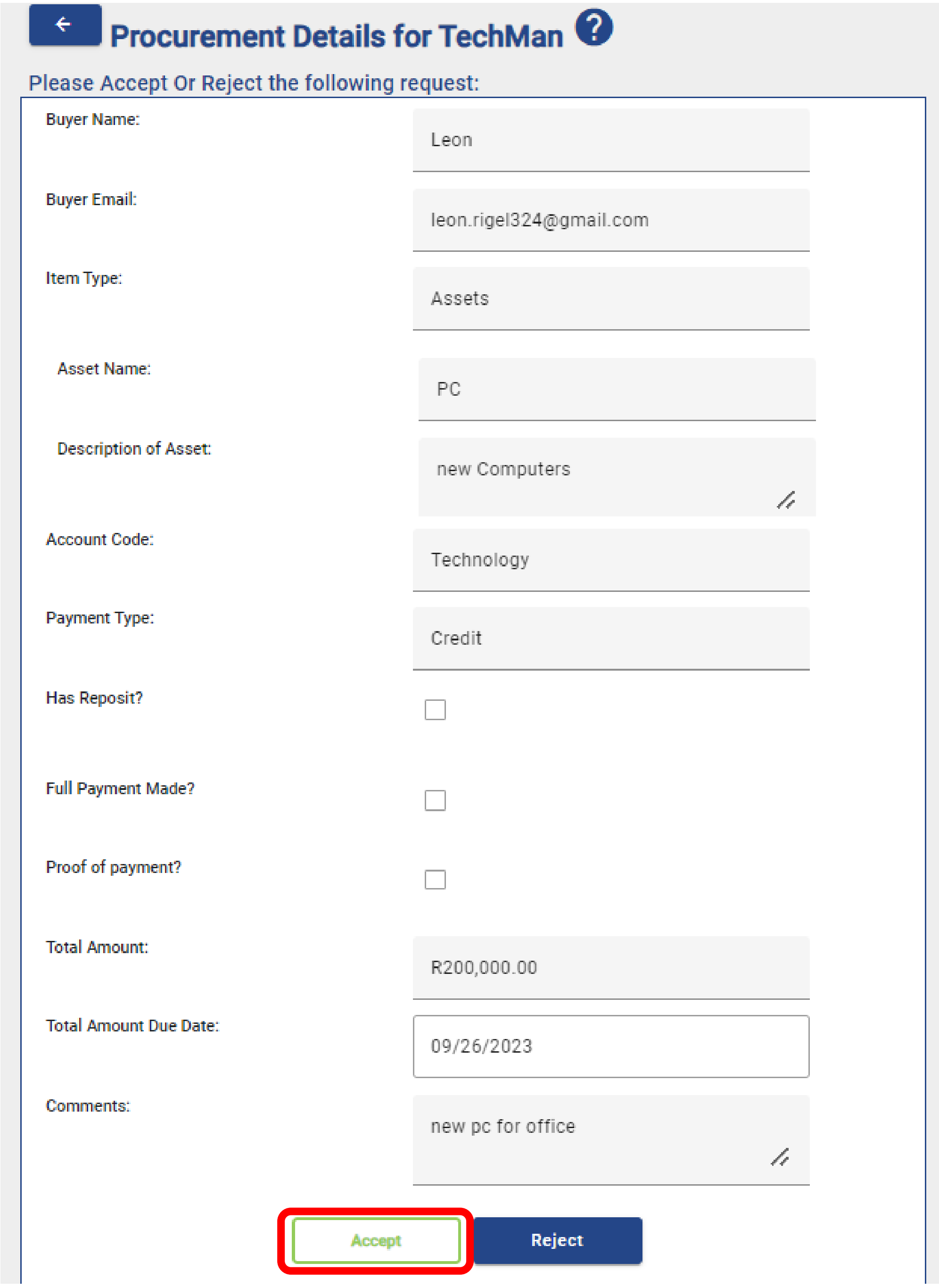


Figure 1 Click Accept Flagged Procurement Request Button Asset

## Step 3 Reject Flagged Procurement Details:

**Reject a Flagged Procurement Details request by clicking on the "View" button on the Flagged Procurement Details screen:**

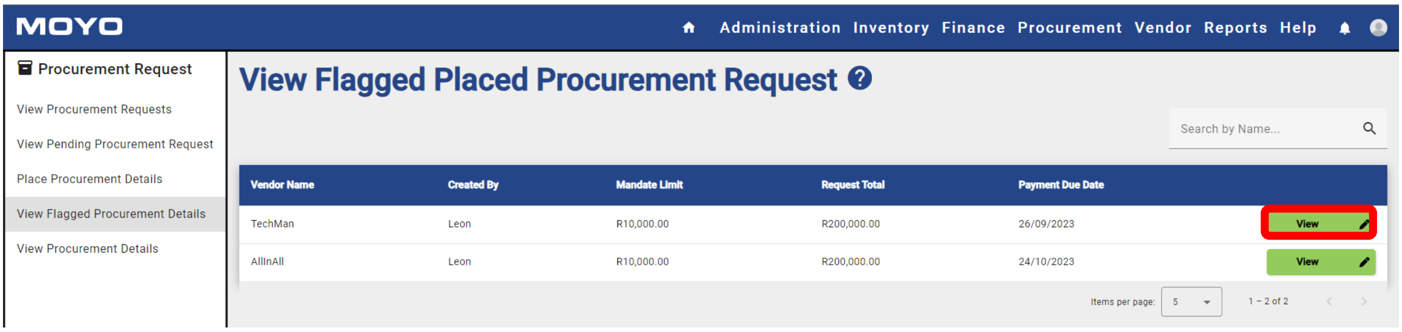


Figure 1 Click View Flagged Procurement Details Button Reject

**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.**

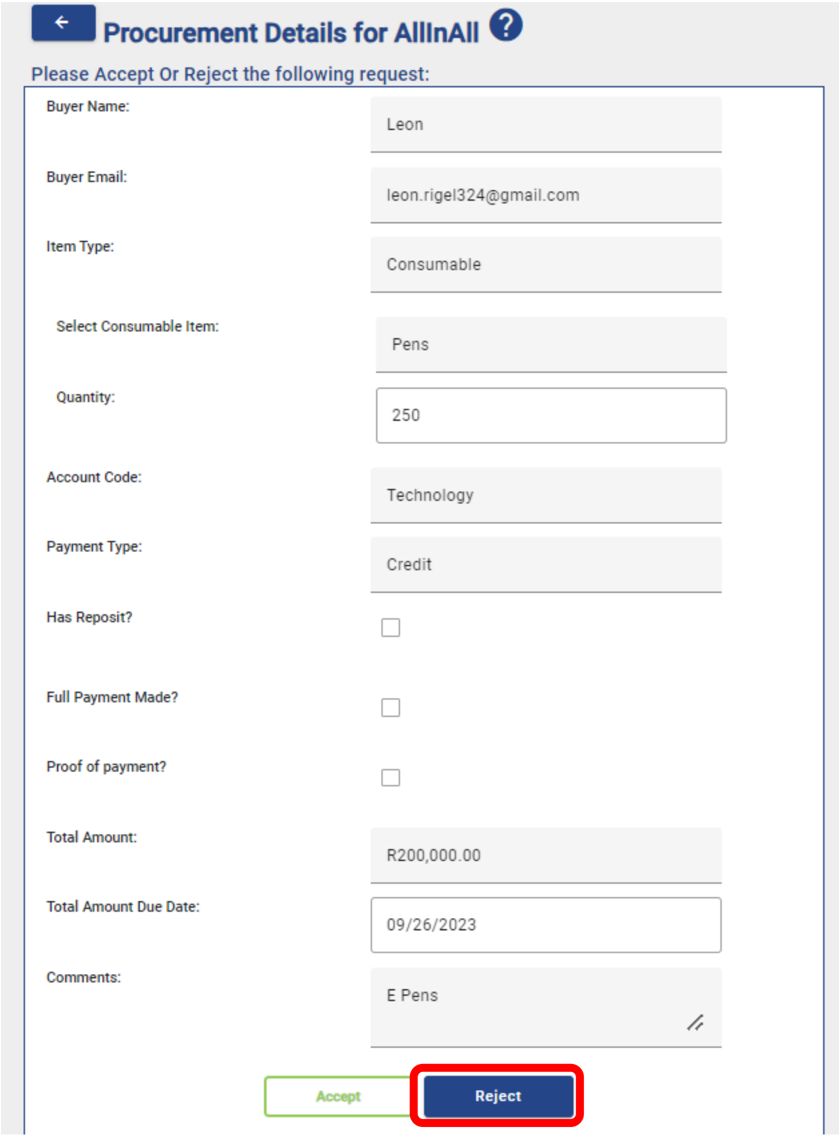


Figure 1 Click Reject Flagged Procurement Request Button Consumable

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

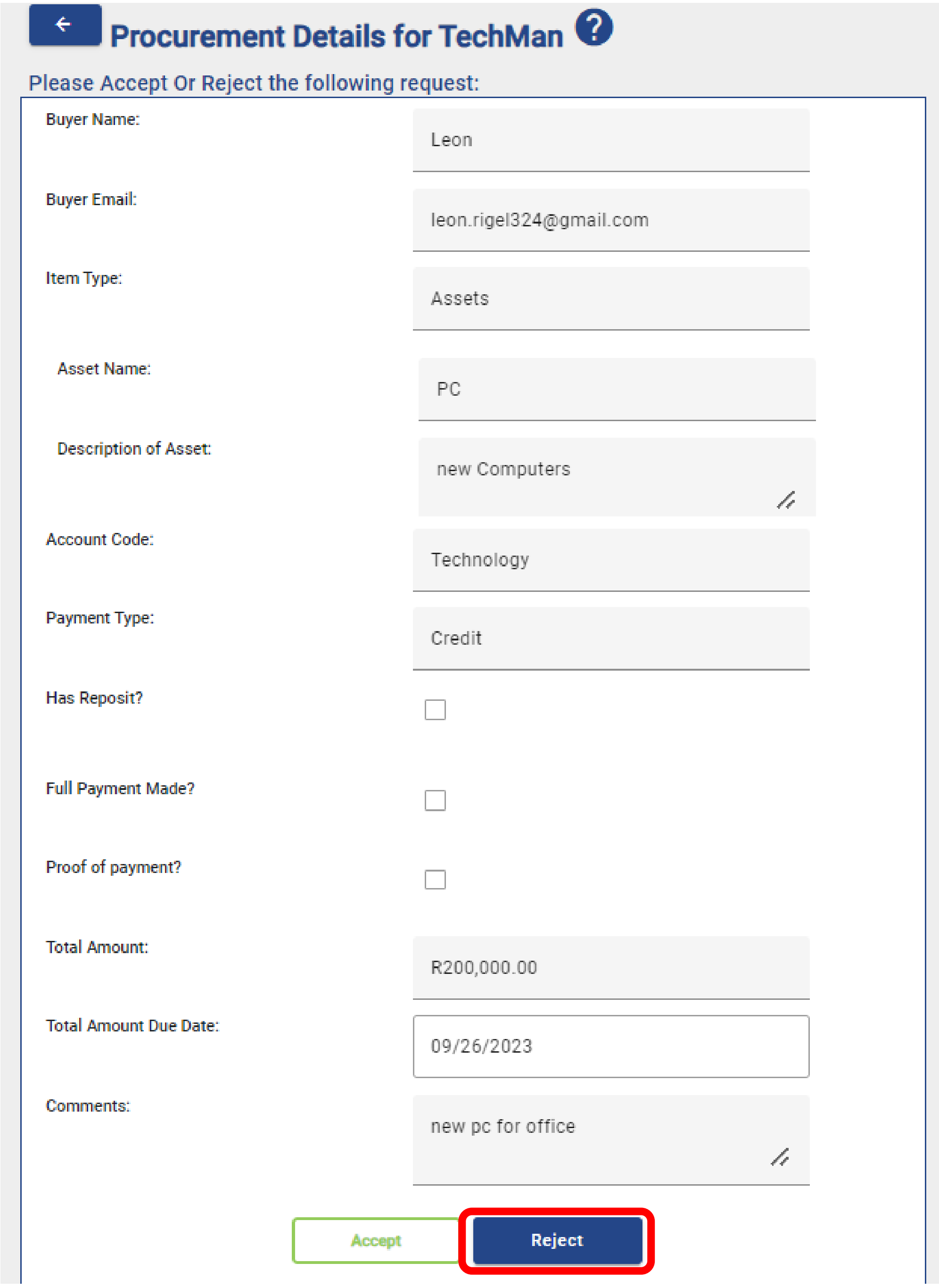


Figure 1 Click Reject Flagged Procurement Request Button Asset

# 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:**

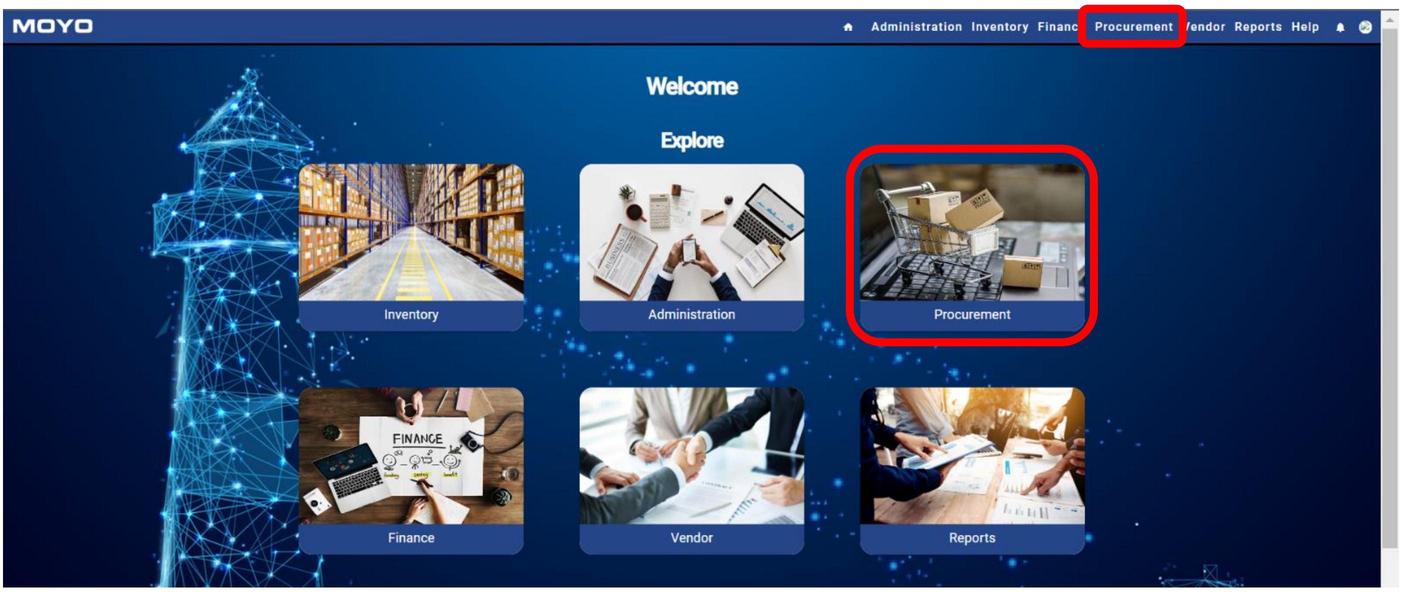


Figure 1 Home Screen to View Procurement Details Screen

**Then Click on the "View Procurement Details" button on the Procurement side navbar:**

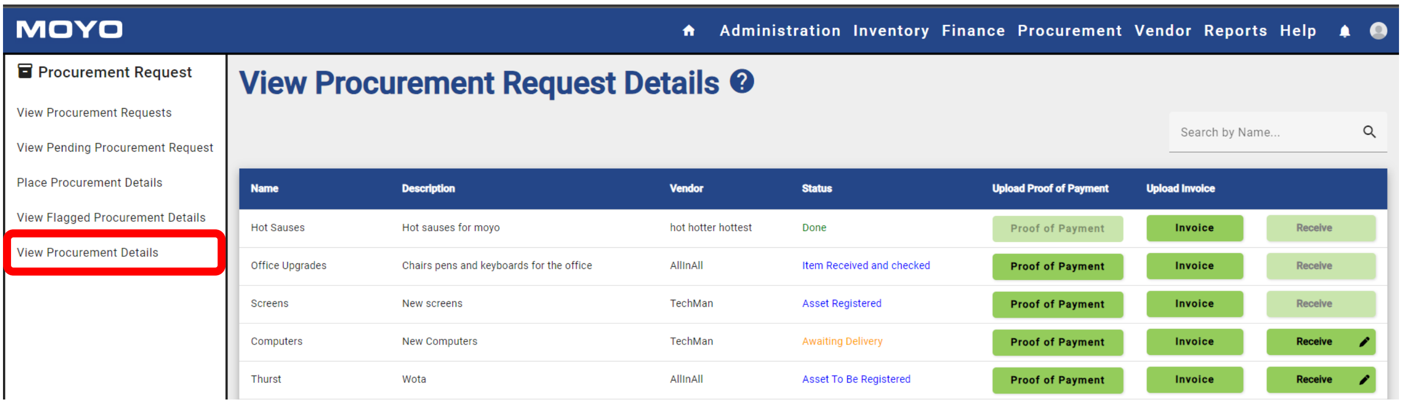


Figure 1 Procurement side nav to View Procurement Details Screen

## 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:**

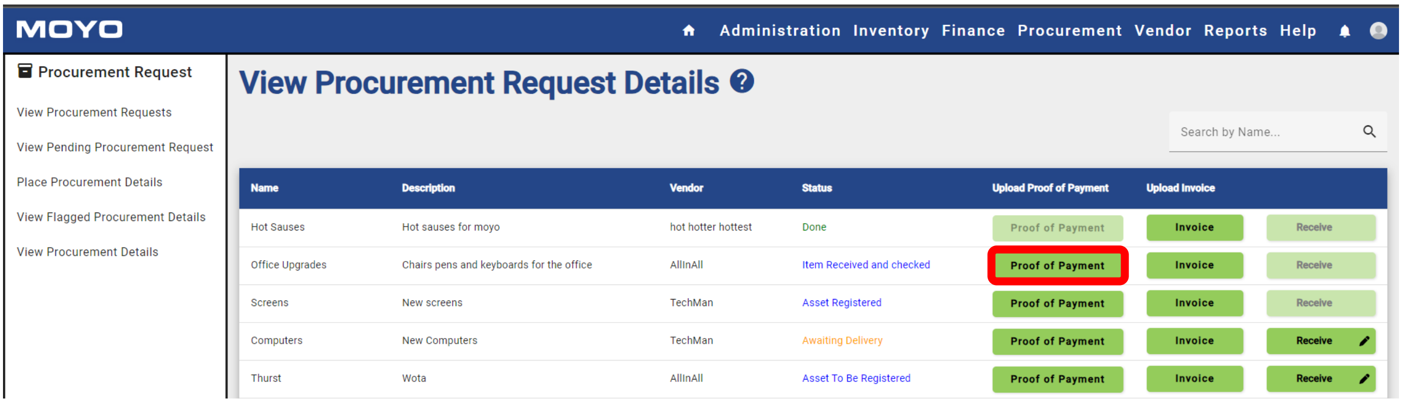


Figure 1 Click Proof of Payment View Procurement Details Button

**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)**

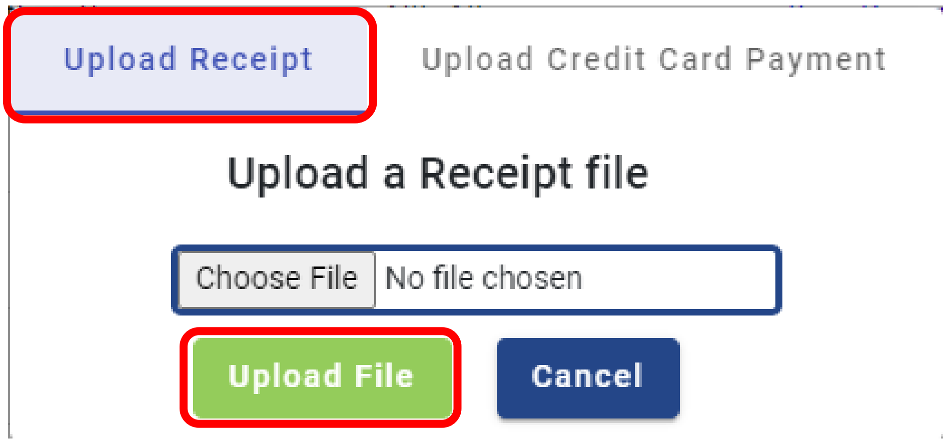


Figure 1 Click Upload File Upload Receipt Proof of Payment

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)**

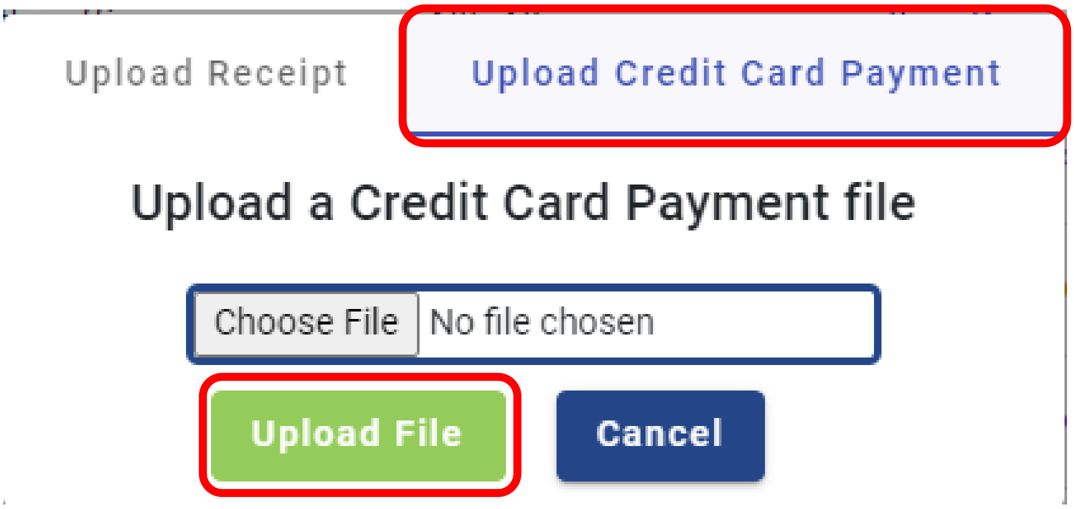


Figure 1 Click Upload File Upload Credit Card Payment Proof of Payment

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:**

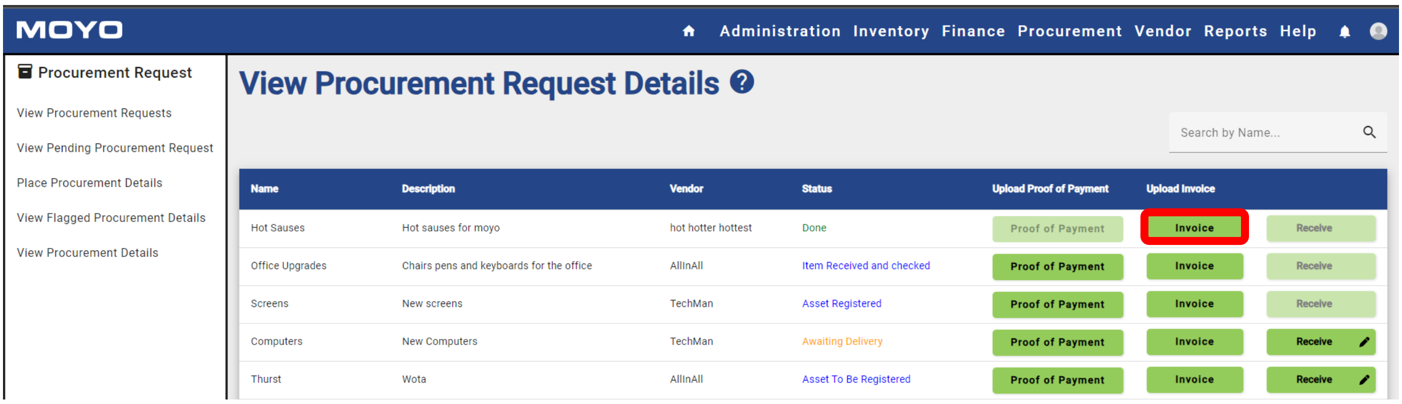


Figure 1 Click Invoice View Procurement Details Button

**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.**

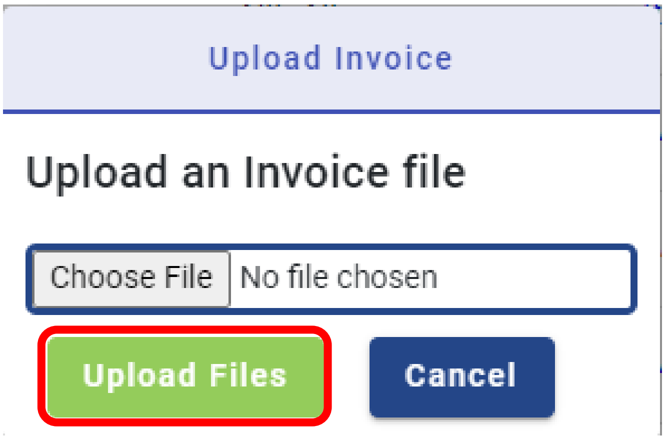


Figure 1 Click Upload File Upload Invoice

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:**

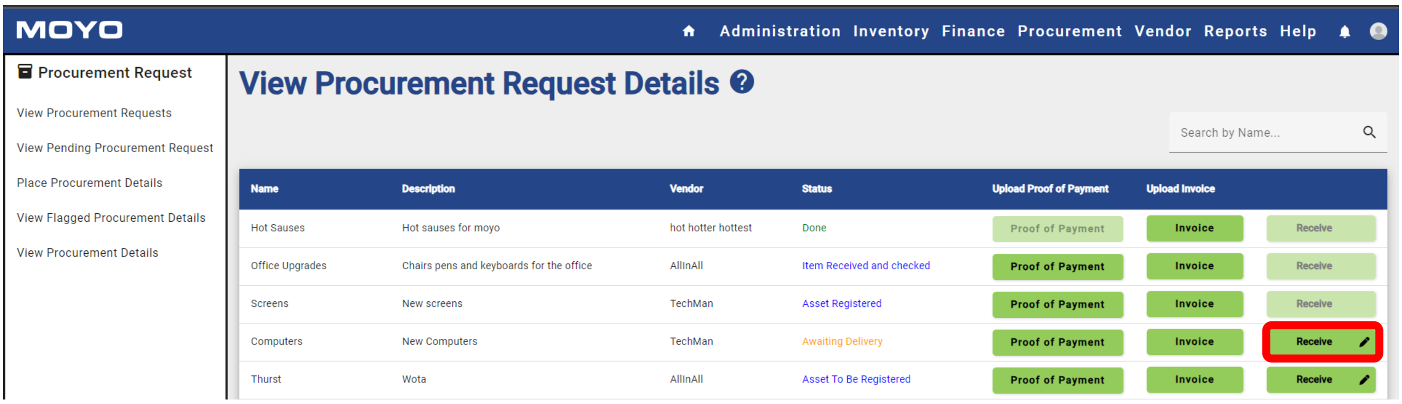


Figure 1 Click Receive View Procurement Details Button Consumable

**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.**

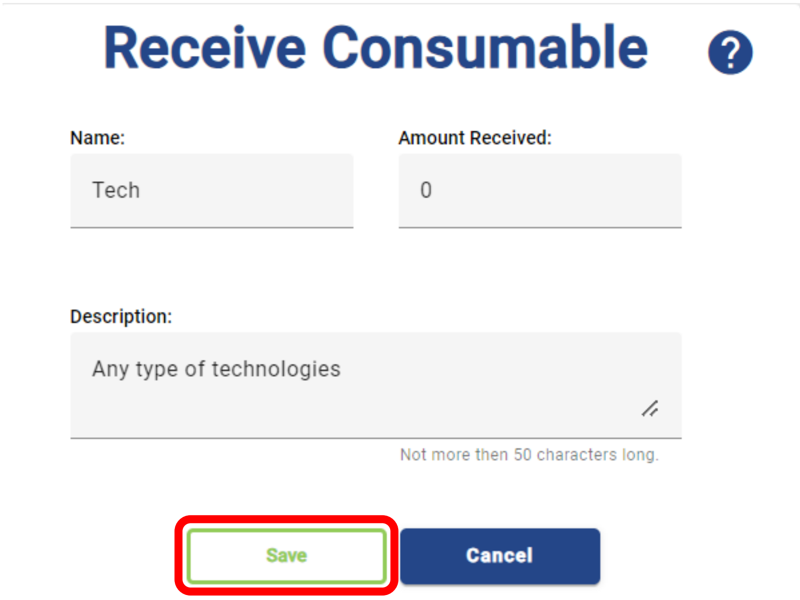


Figure 1 Click Upload File Upload Invoice

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:**

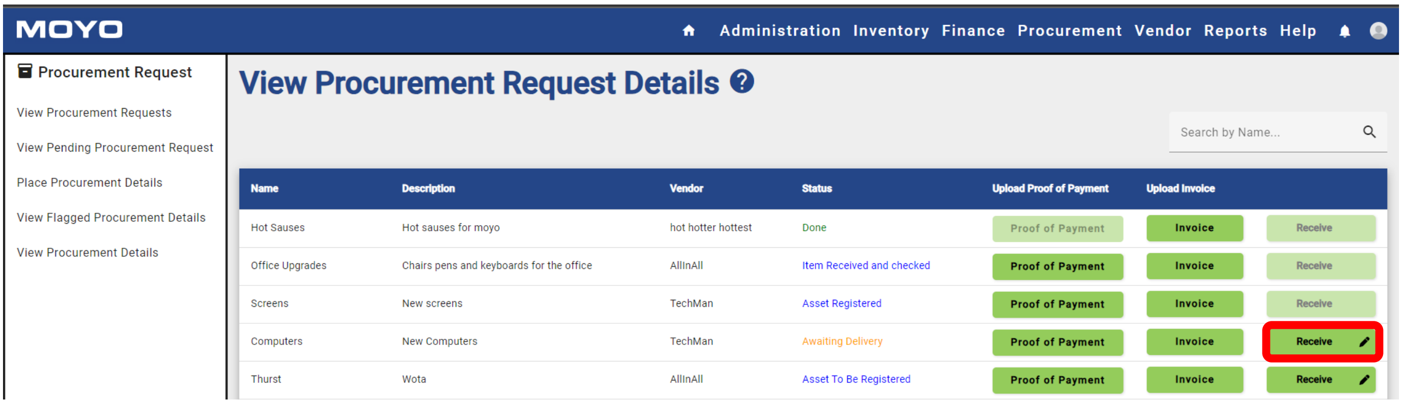


Figure 1 Click Receive View Procurement Details Button Asset

**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.**

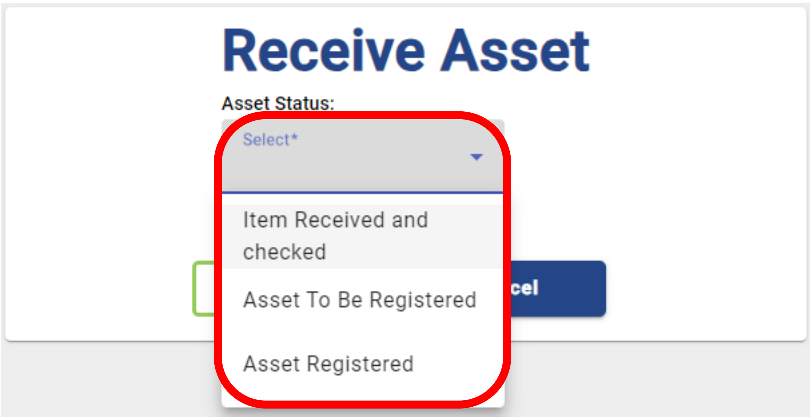


Figure 1 Click Dropdown Receive Asset Status

- "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.**

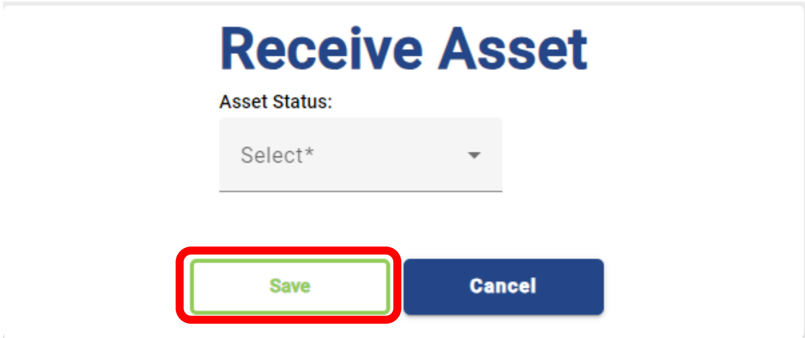


Figure 1 Click Save Receive Asset

## Explanation of the View Procurement Details statuses:

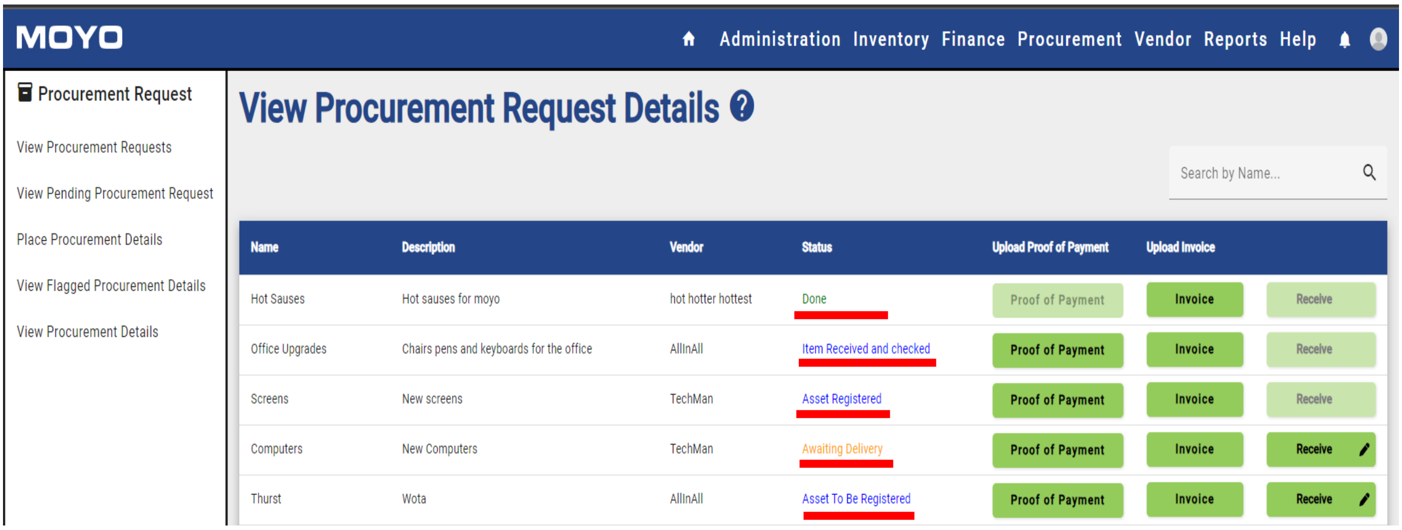


Figure 1 View Procurement Details Status

- 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:**

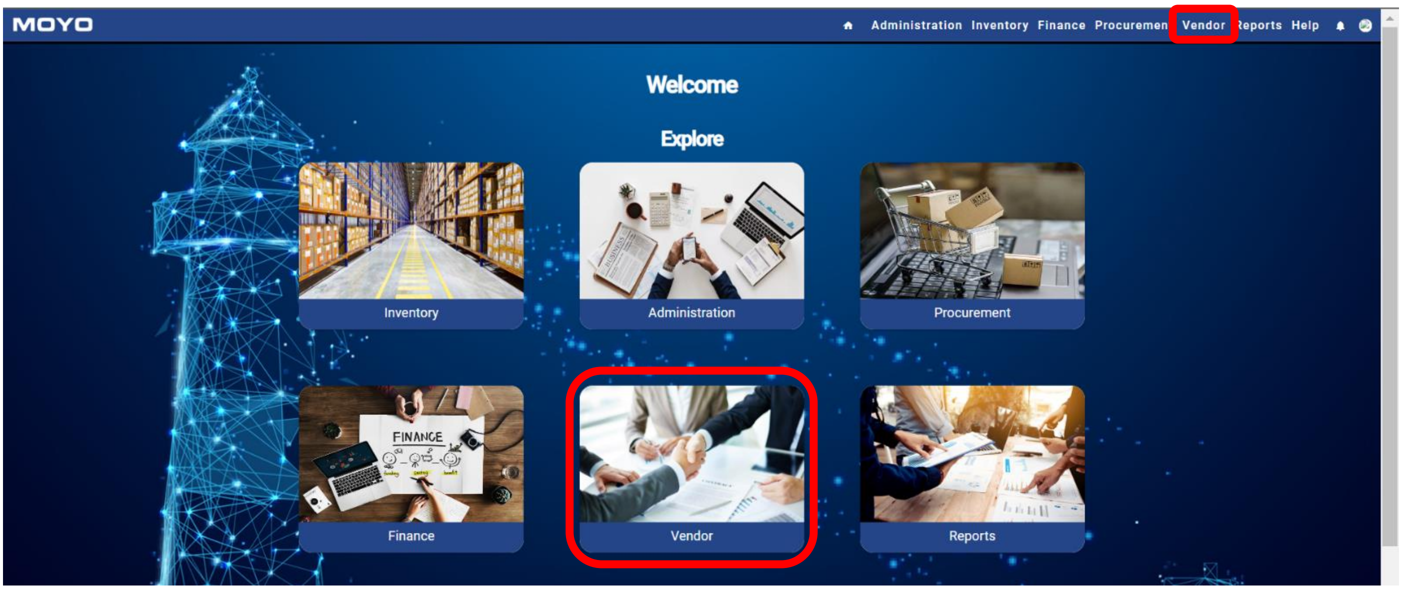


Figure 1 Home Screen to Onboard Request Screen

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

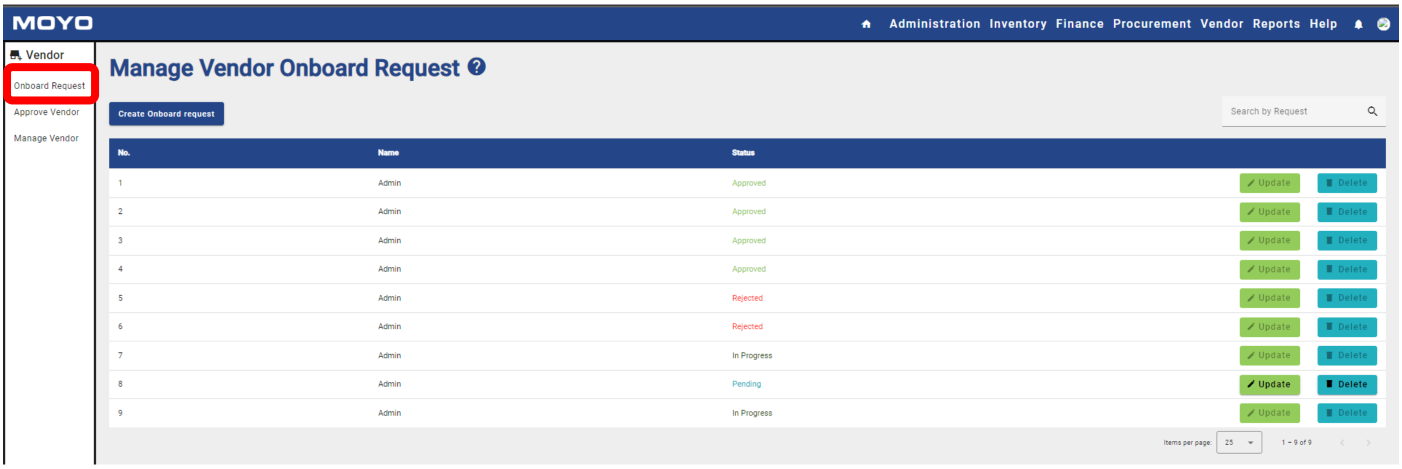


Figure 1 Vendor side nav to Onboard Request Screen

## Step 2 Create Onboard Request:

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

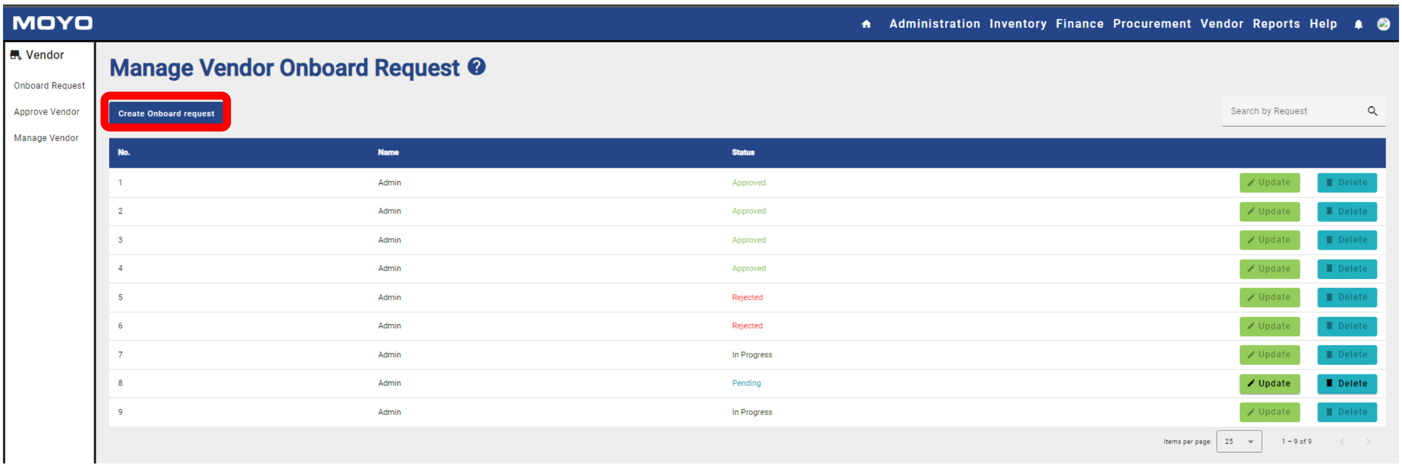


Figure 1 Click Create Onboard Request Button

**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)**

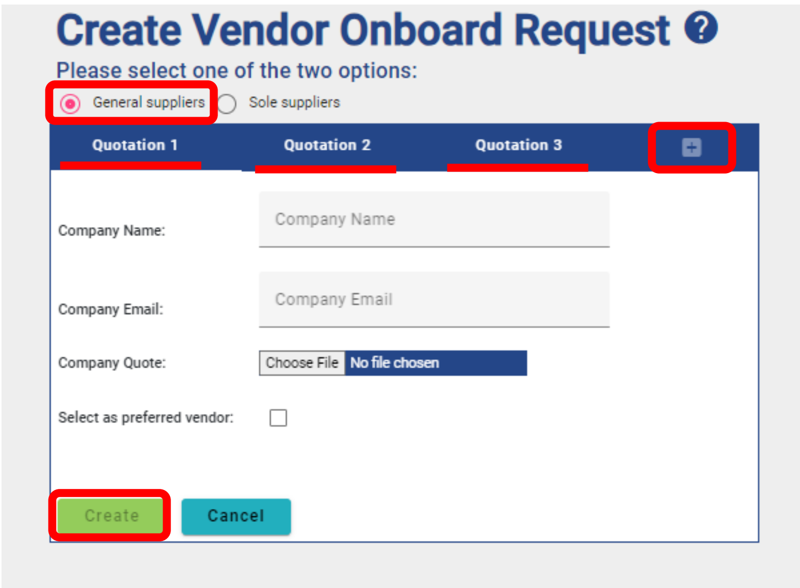


Figure 1 Click Create Onboard Request Button General Supplier

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)**

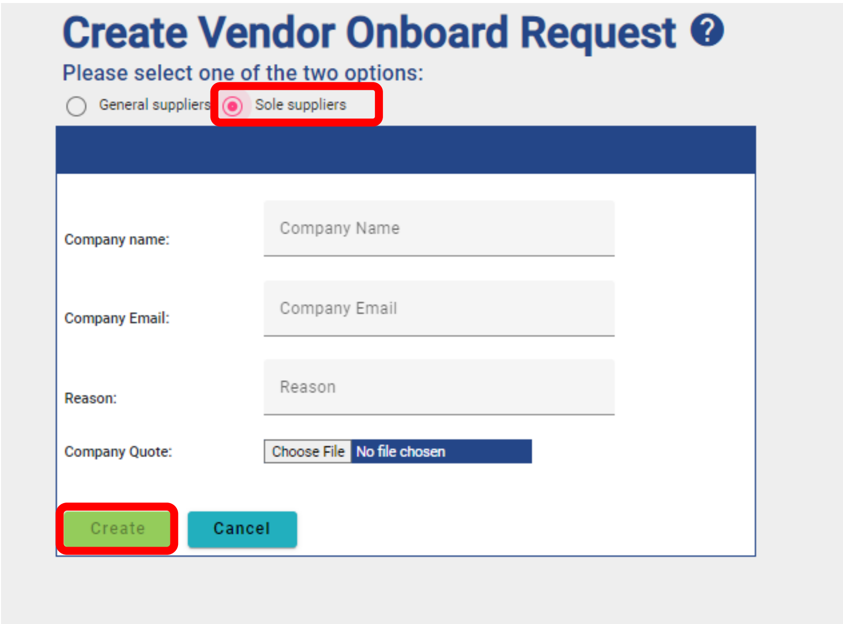


Figure 1 Click Create Onboard Request Button Sole Supplier

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.)**

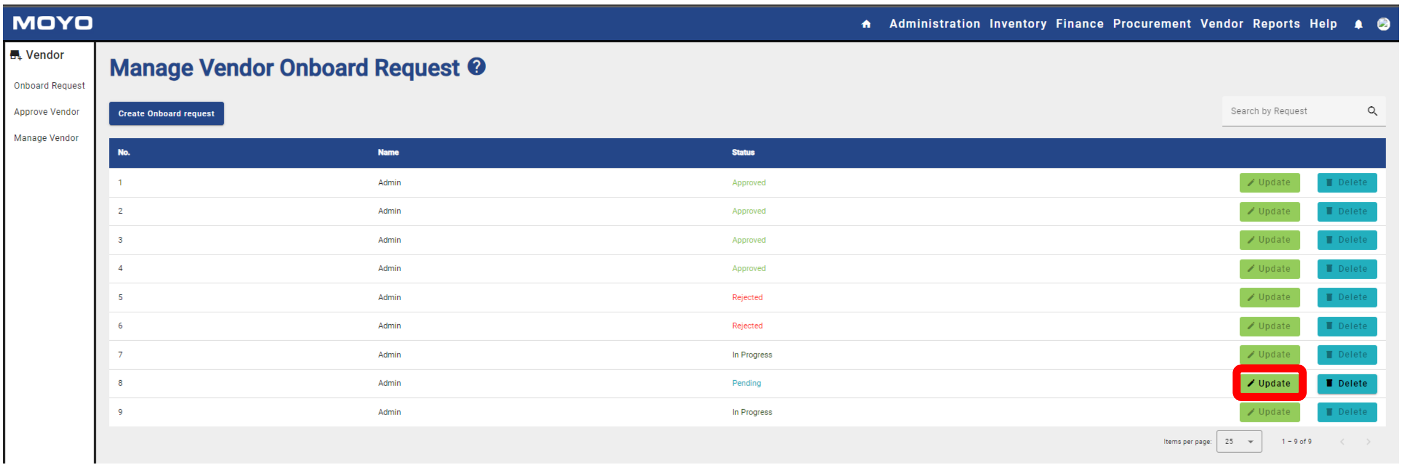


Figure 1 Click Edit Budget Category Button.

**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)**

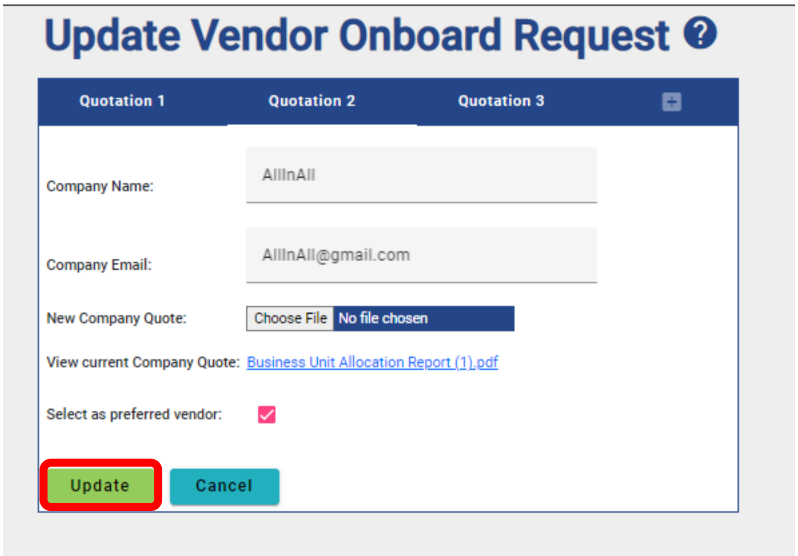


Figure 1 Click Update Edit Onboard Request Button General Supplier

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)

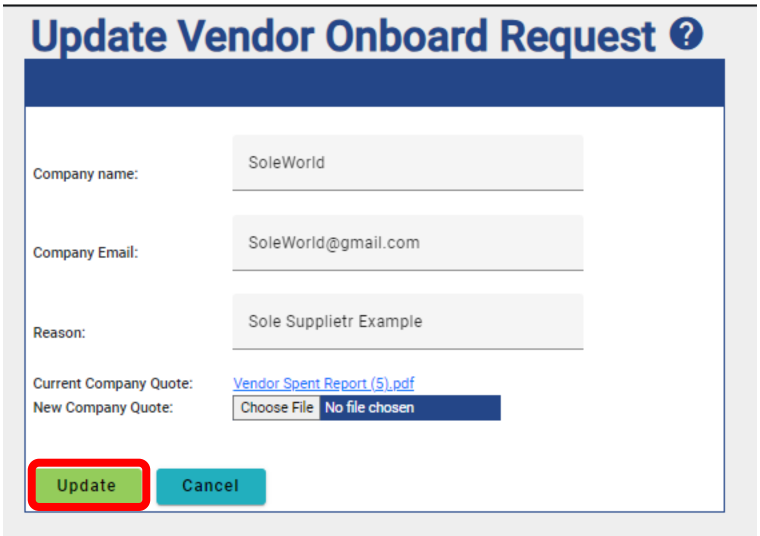


Figure 1 Click Update Edit Onboard Request Button Sole Supplier

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)**

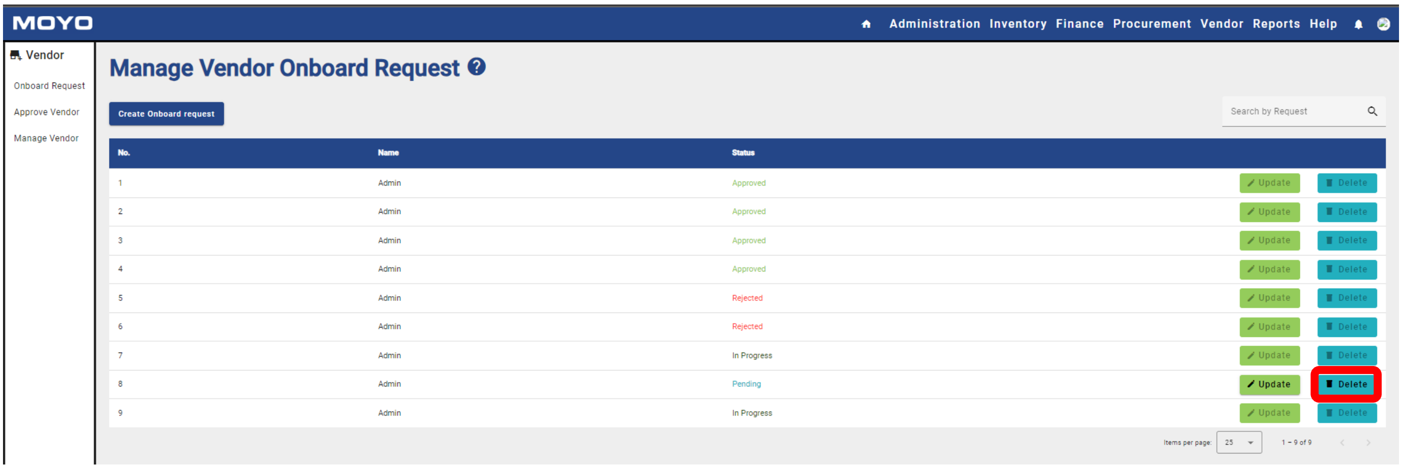


Figure 1 Click Delete Onboard Request Button

**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)**

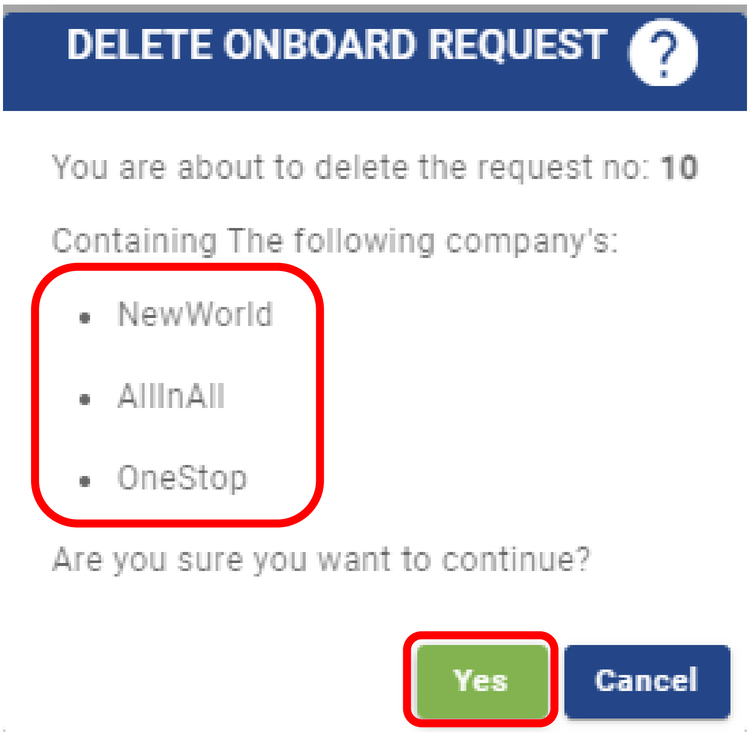


Figure 1 Click Yes Delete Onboard Request Button General Supplier

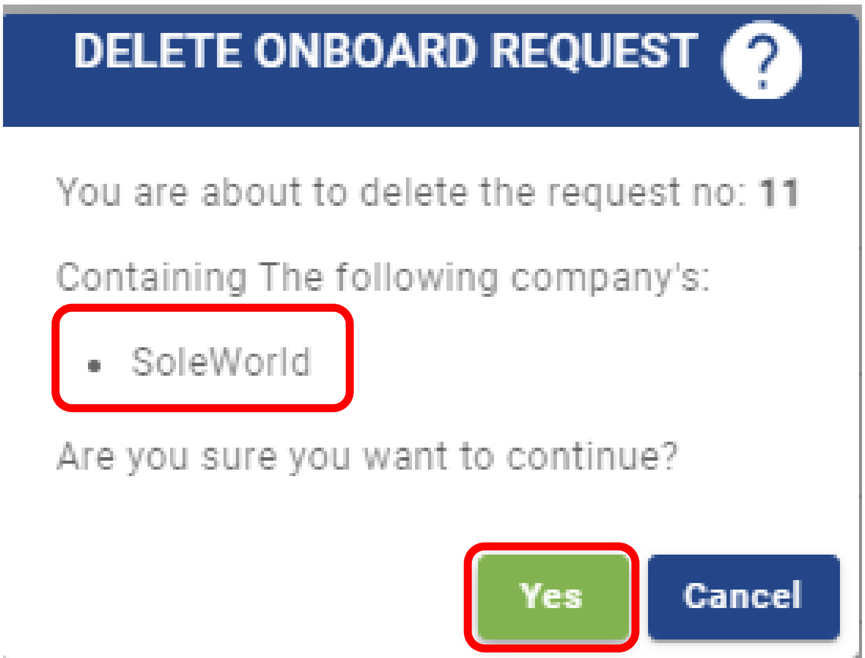


Figure 1 Click Yes Delete Onboard Request Button Sole Supplier

## Explanation of the Onboard Request statuses:

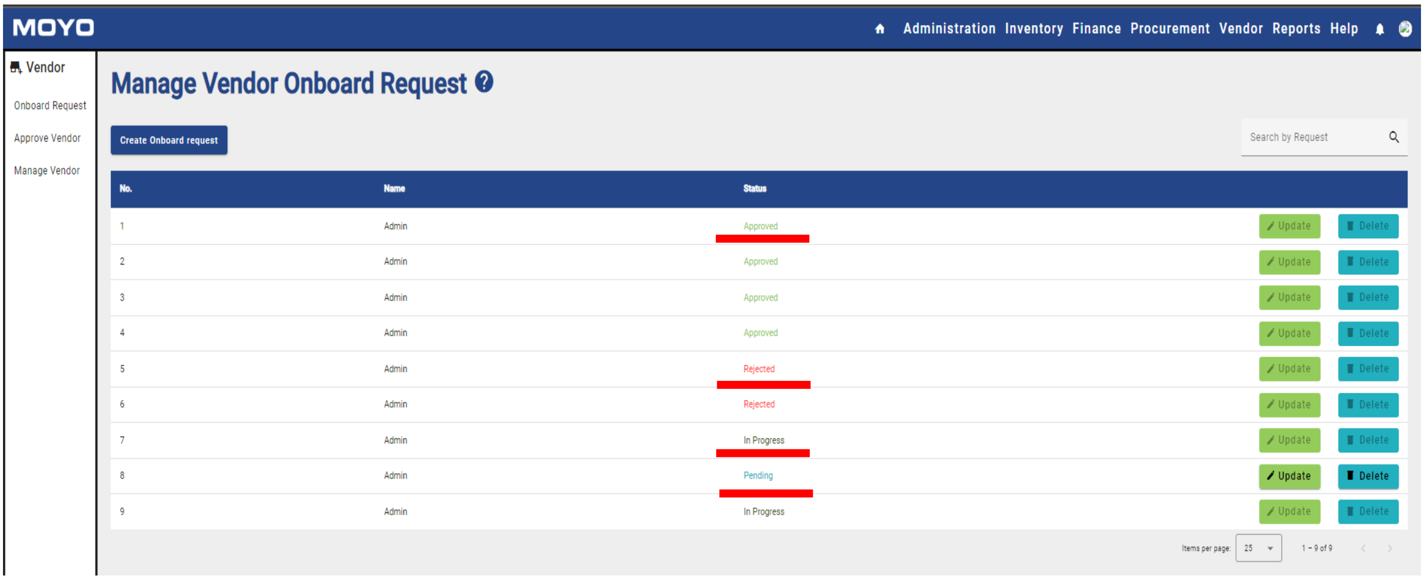


Figure 1 Delegation Status

- 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:**

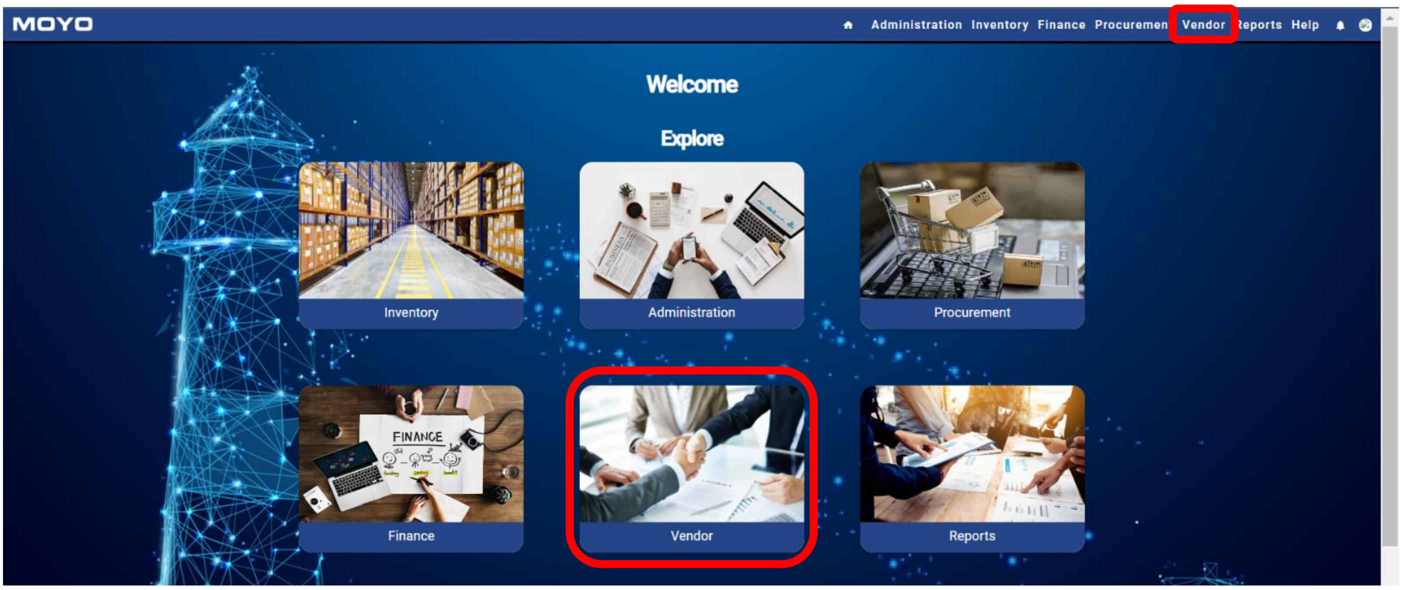


Figure 1 Home Screen to Approve Vendor Screen

**Then Click on the "Approve Vendor" button on the Vendor side navbar:**

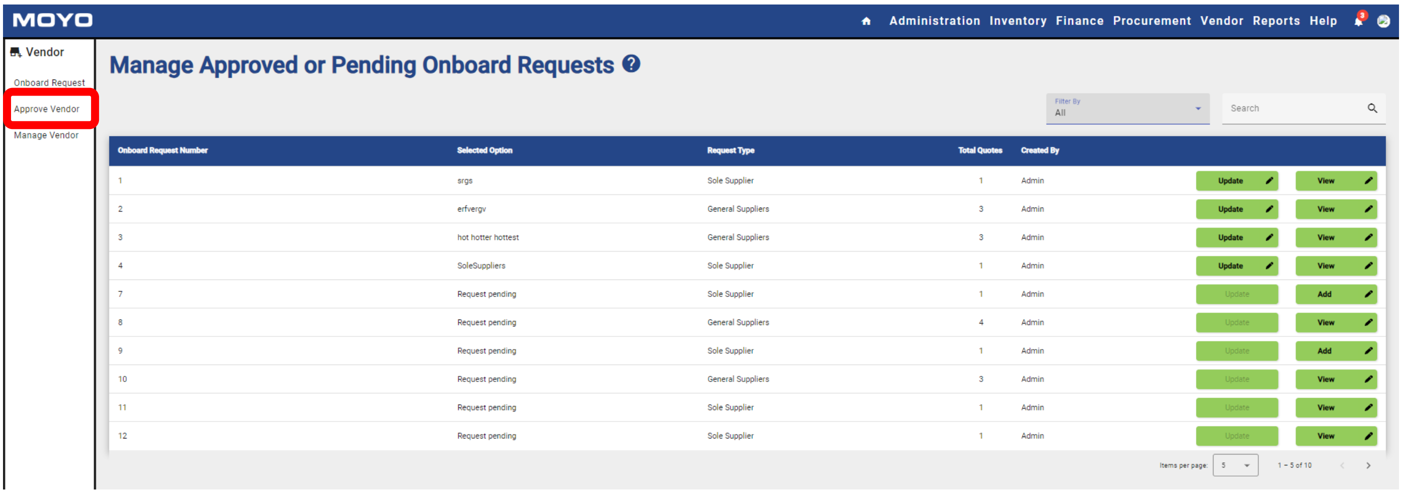


Figure 1 Vendor side nav to Approve Vendor Screen

## 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)**

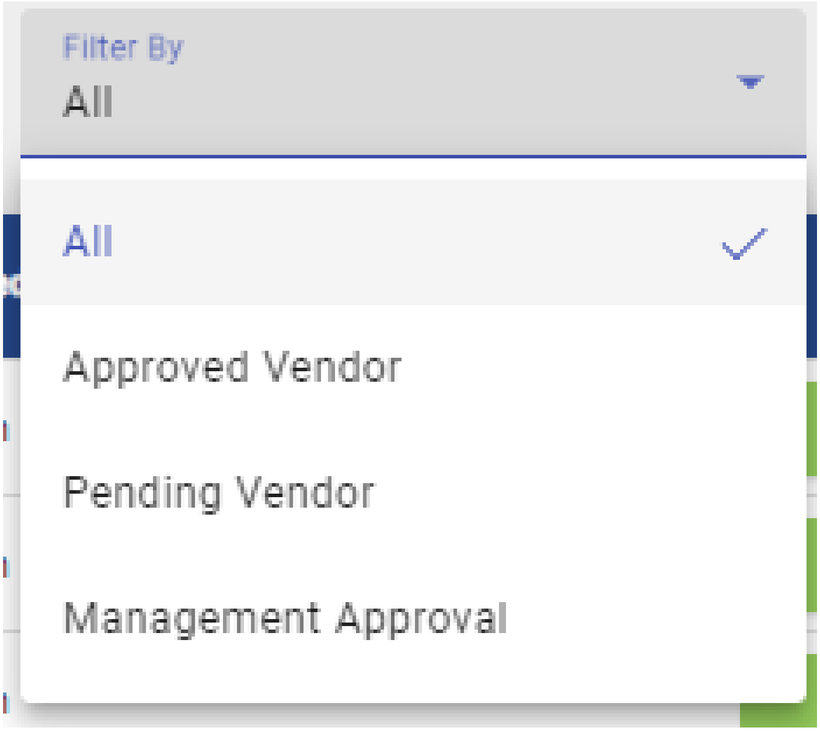


Figure 1 Filter Approve Vendor Button

- "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)**

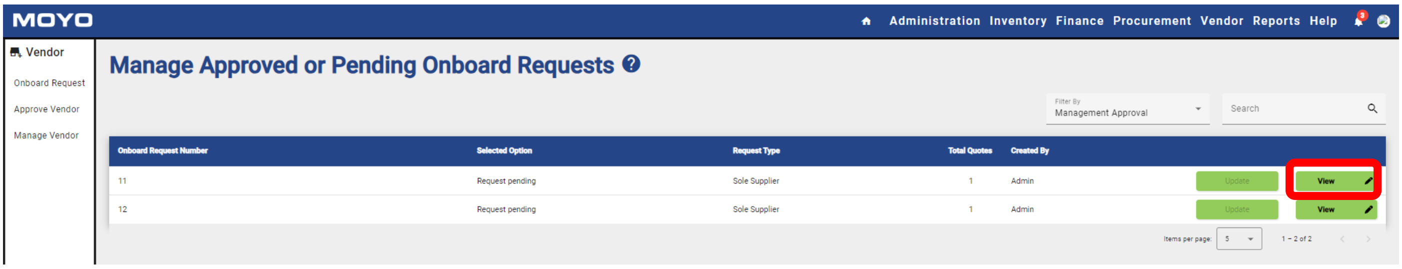


Figure 1 Click View Sole Supplier Approve Vendor Button

**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.**


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)**

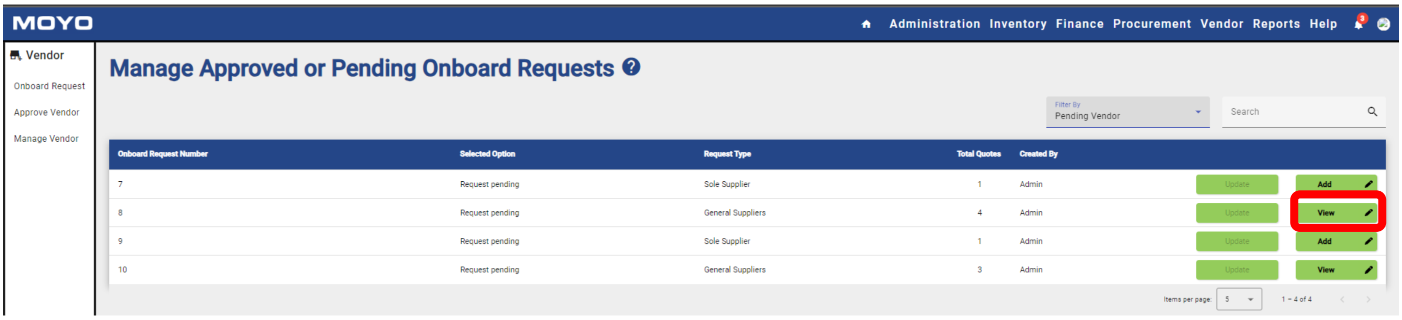


Figure 1 Click View General Supplier Approve Vendor Button

**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)**

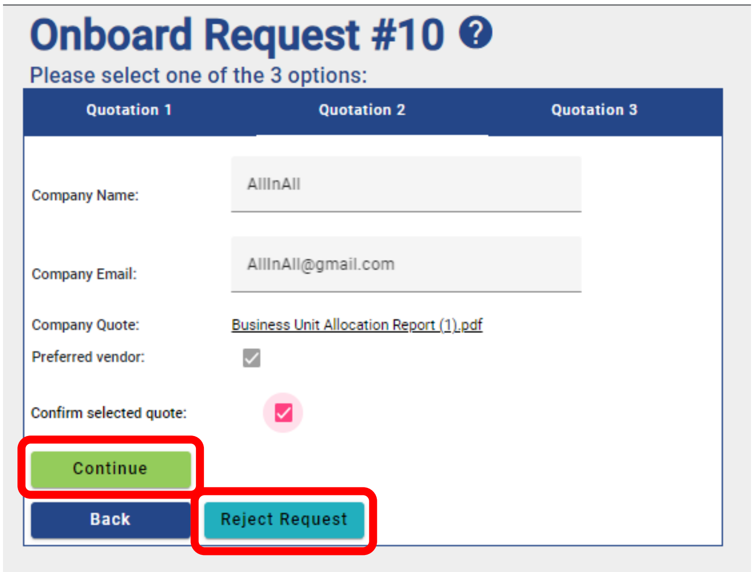

Figure 1 Approve/Reject General Supplier

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)**

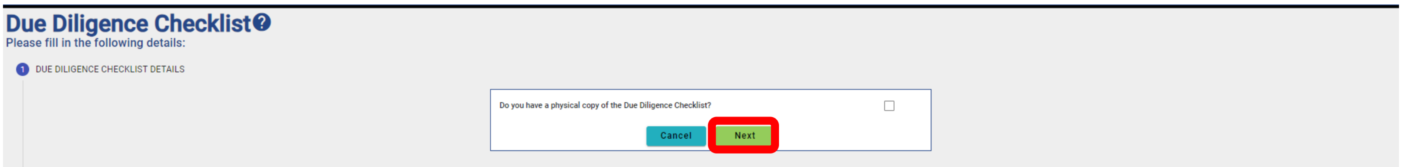


Figure 1 Click Next Due Diligence Checklist Details Approve Vendor Button

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)**

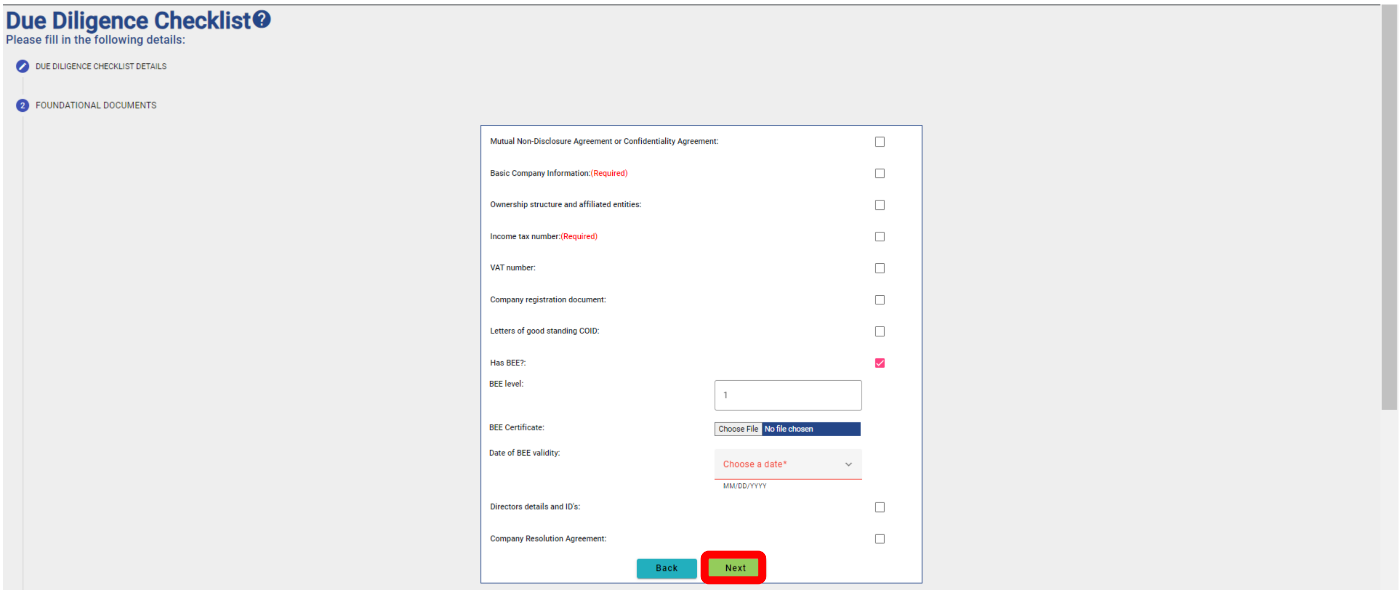


Figure 1 Click Next Foundational Documents Approve Vendor Button.

1. "Mutual Non-Disclosure Agreement or Confidentiality Agreement": Check the Checkbox if there is a mutual non-disclosure agreement of 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)**

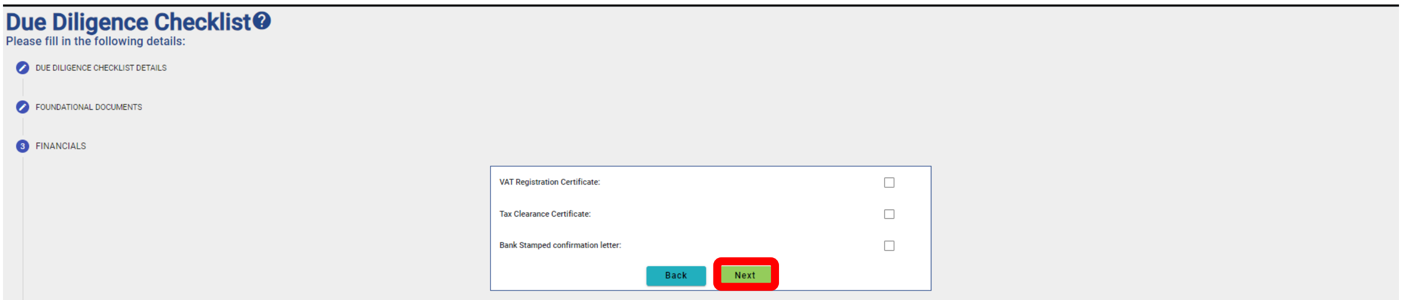


Figure 1 Click Next Financials Approve Vendor Button.

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)**

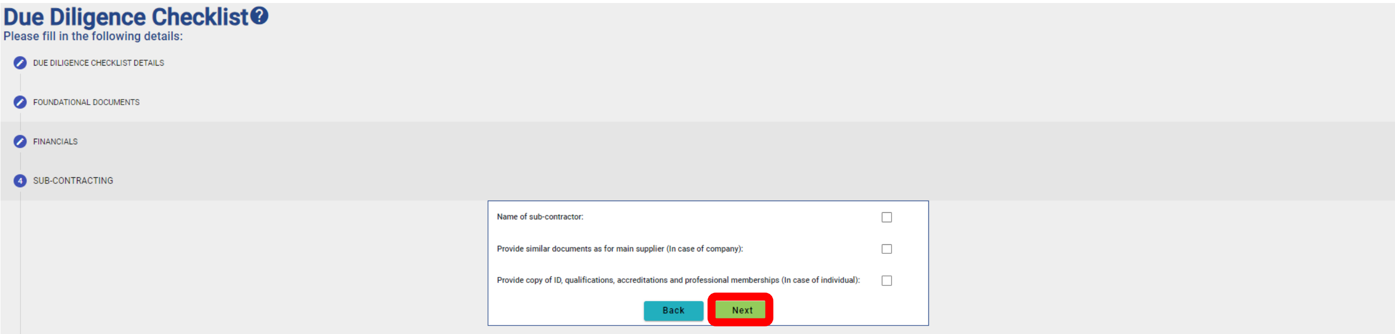


Figure 1 Click Next Sub-Contracting Approve Vendor Button.

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)**

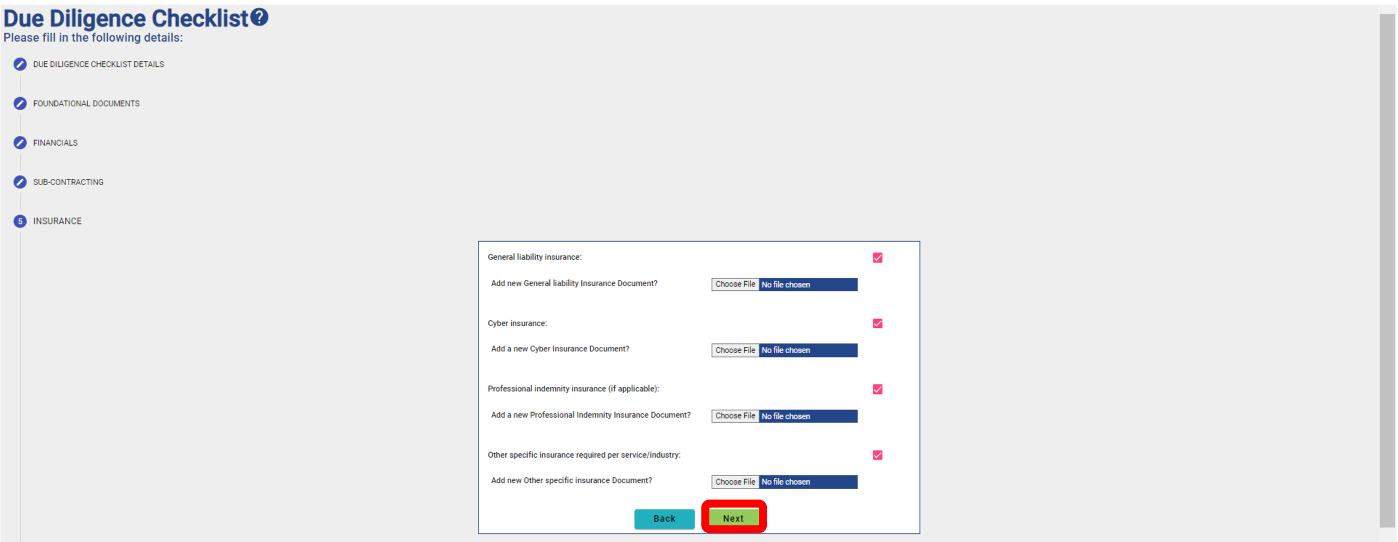


Figure 1 Click Next Insurance Approve Vendor Button.

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)**

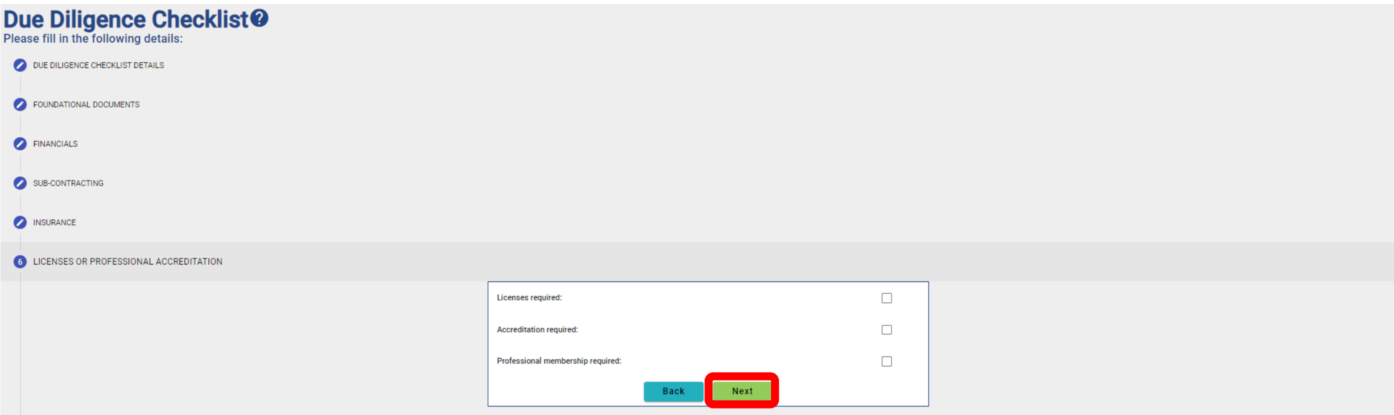


Figure 1 Click Next License or professional accreditation Approve Vendor Button.

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)**

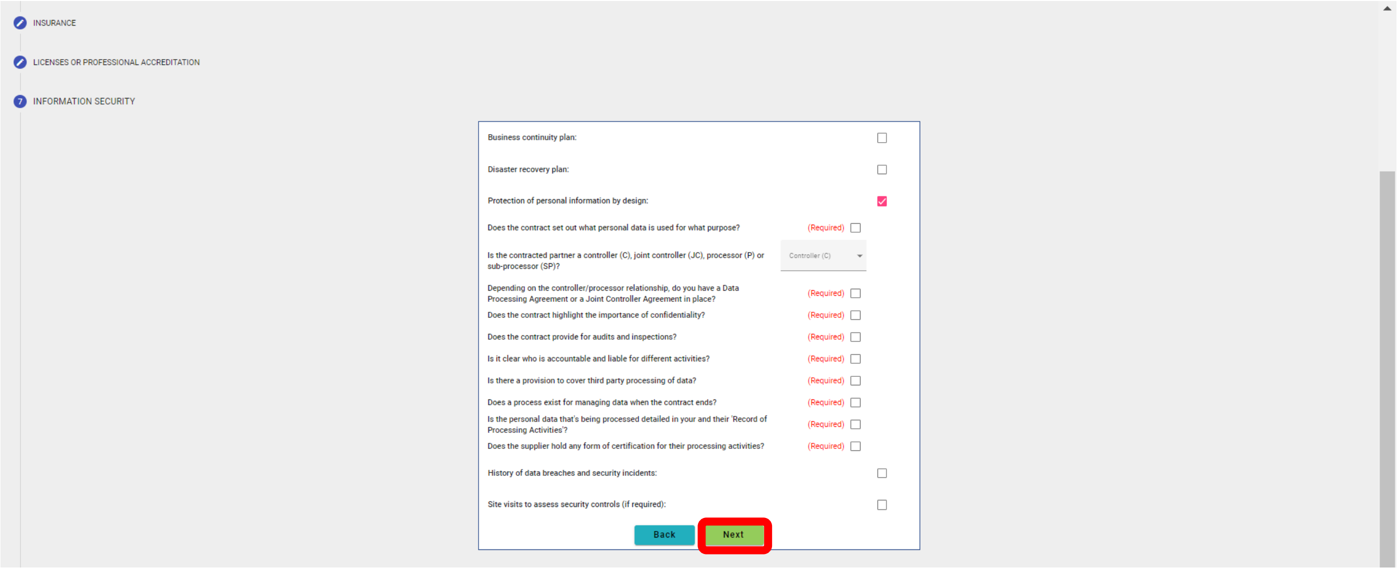


Figure 1 Click Next Information Security Approve Vendor Button.

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)

- "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)**

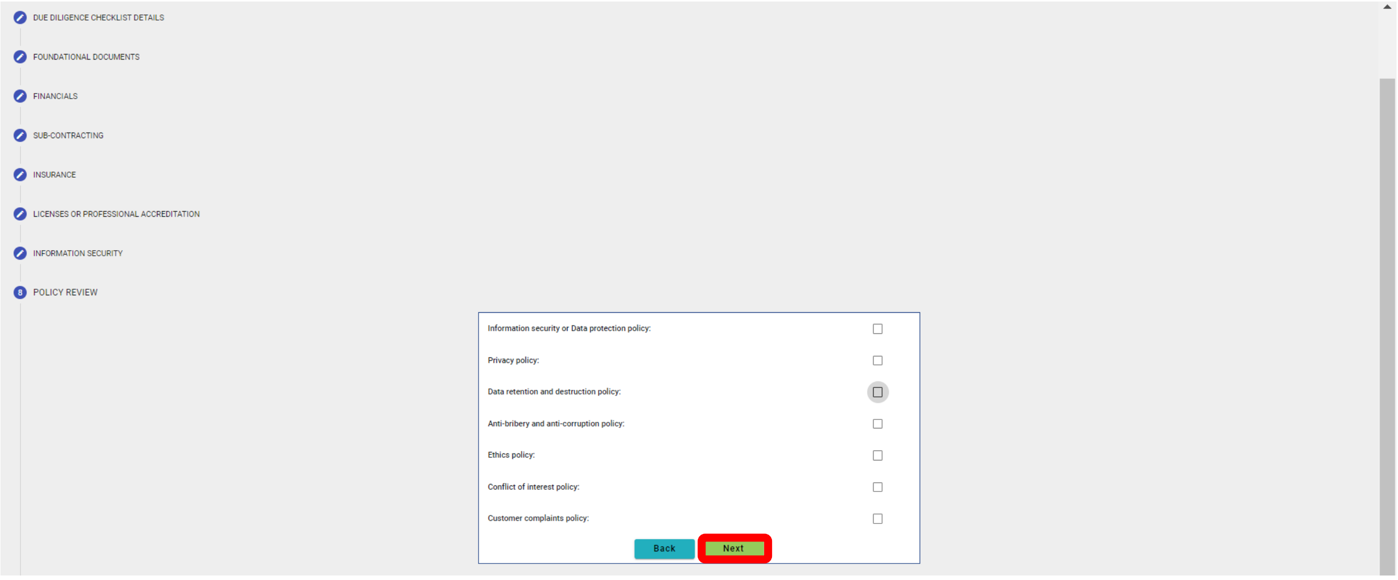


Figure 1 Click Next Policy Review Approve Vendor Button.

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)**

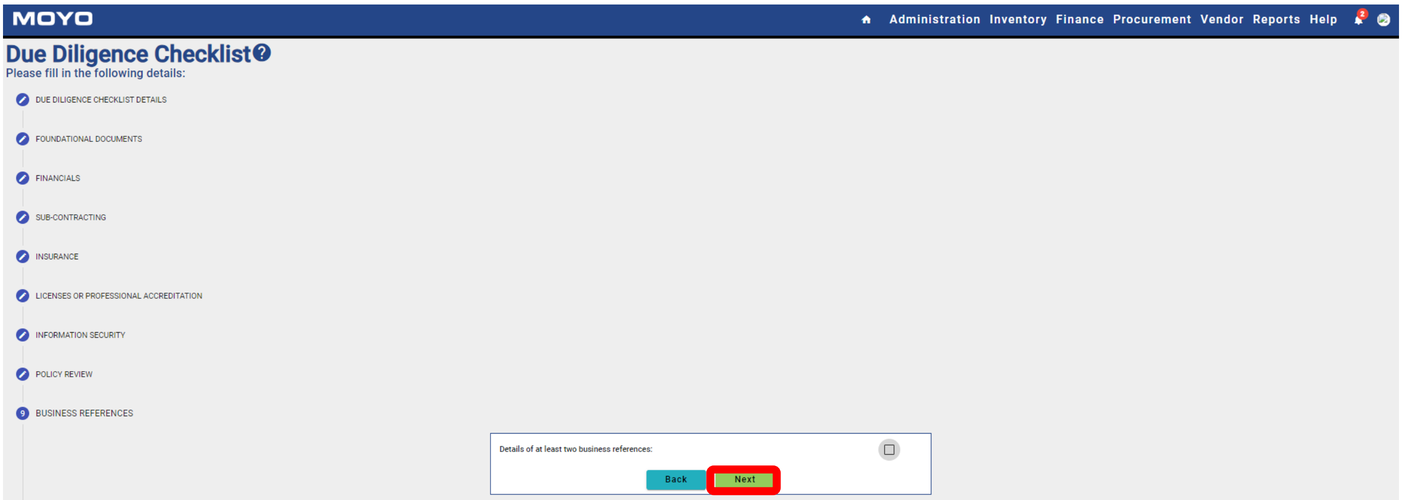


Figure 1 Click Next Business References Approve Vendor Button.

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.**

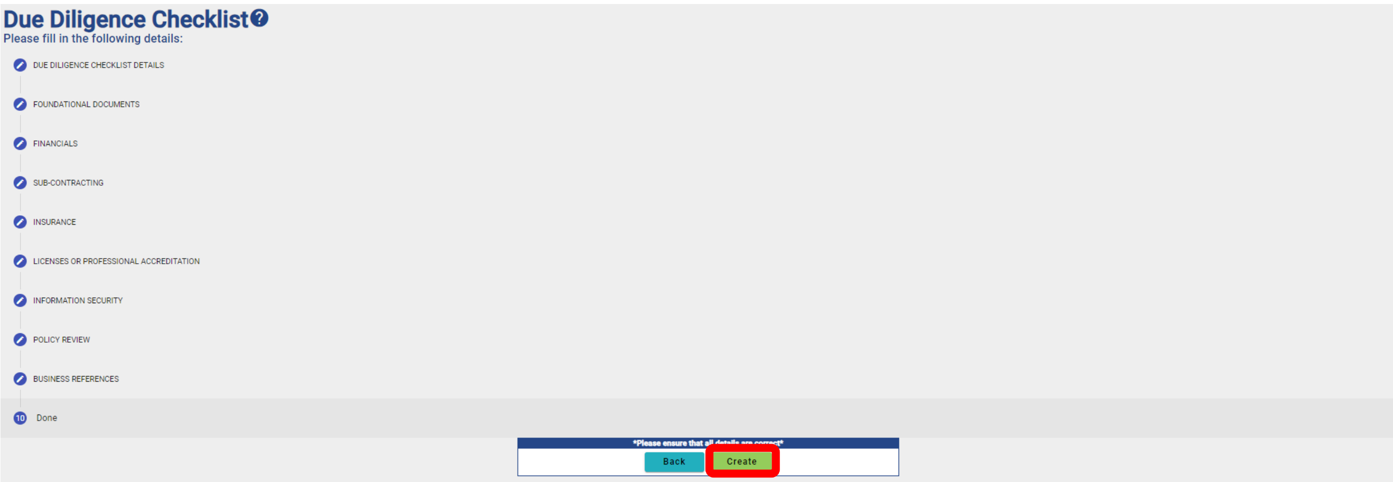


Figure 1 Click Create Done Approve Vendor Button.

## 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)**

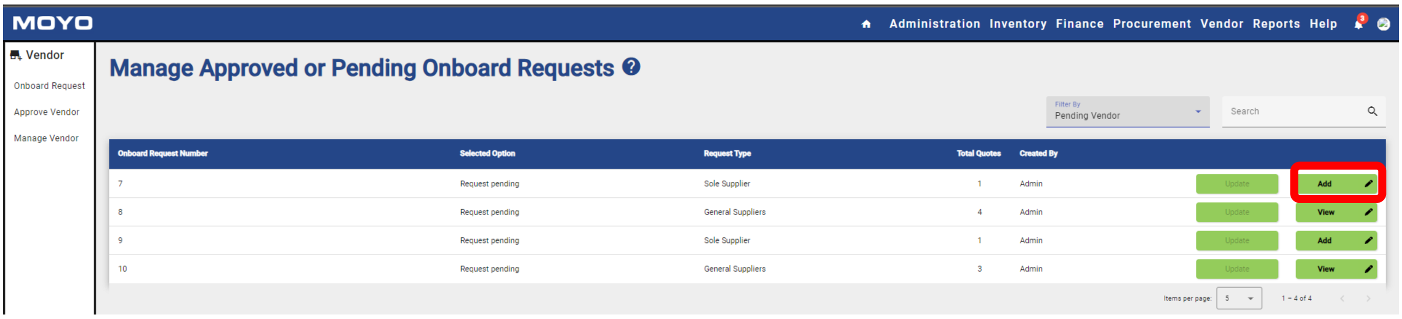


Figure 1 Click Add Sole Supplier Approve Vendor Button

**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.**

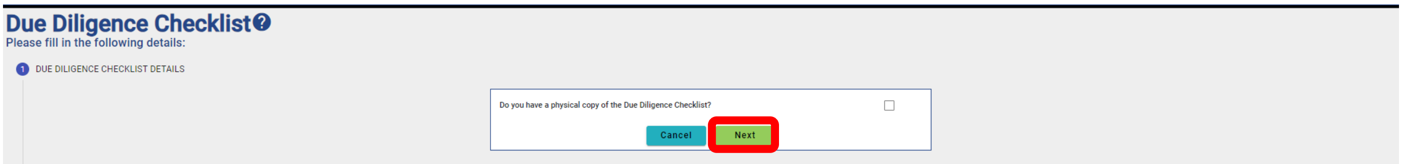


Figure 1 Click Next Due Diligence Checklist Details Approve Vendor Button Sole Supplier

### 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)**

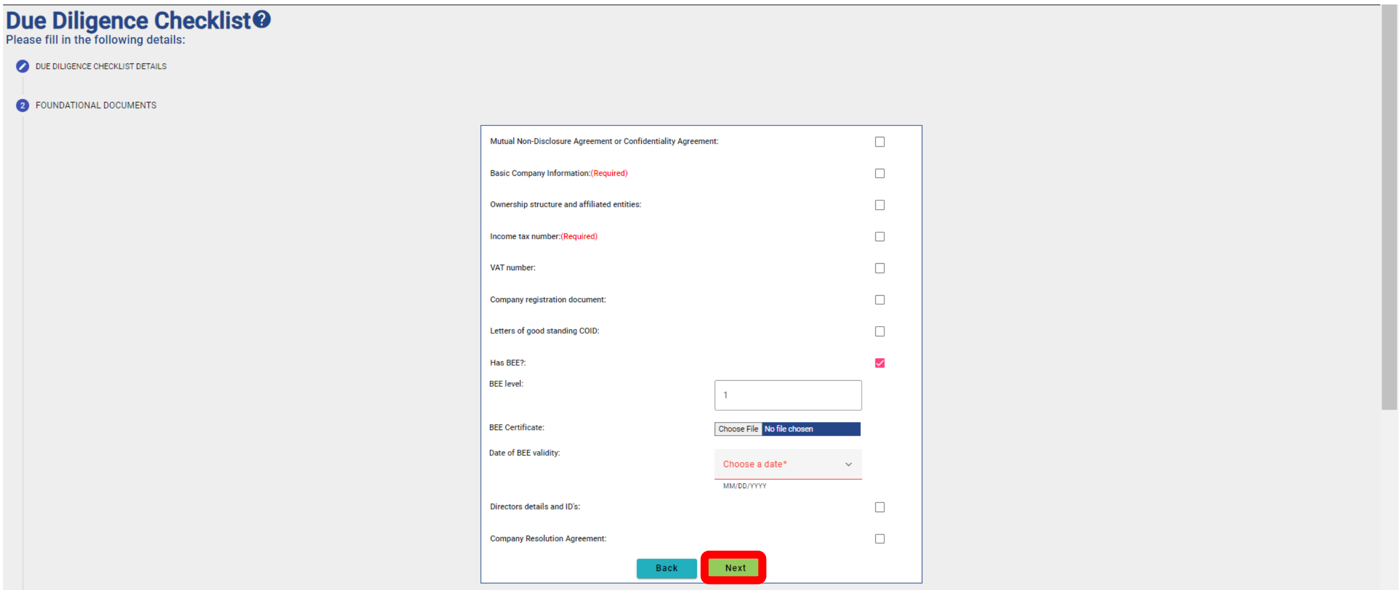


Figure 1 Click Next Foundational Documents Approve Vendor Button Sole Supplier

1. "Mutual Non-Disclosure Agreement or Confidentiality Agreement": Check the Checkbox if there is a mutual non-disclosure agreement of 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)**

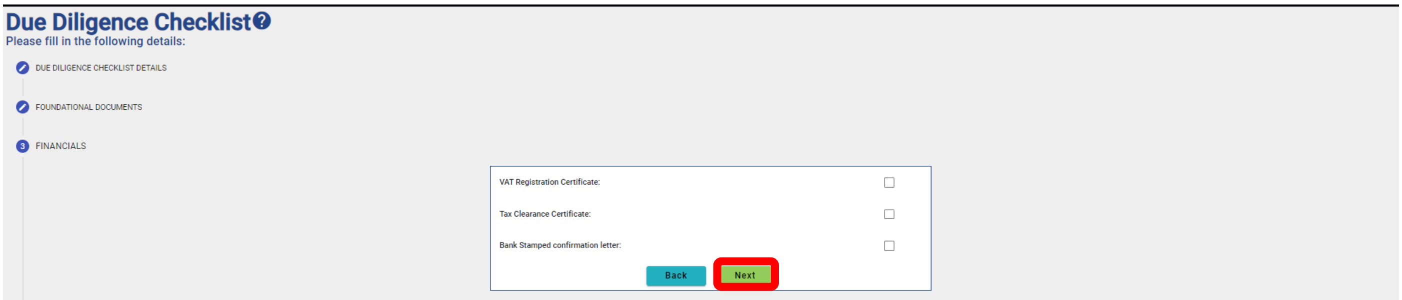


Figure 1 Click Next Financials Approve Vendor Button Sole Supplier

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)**

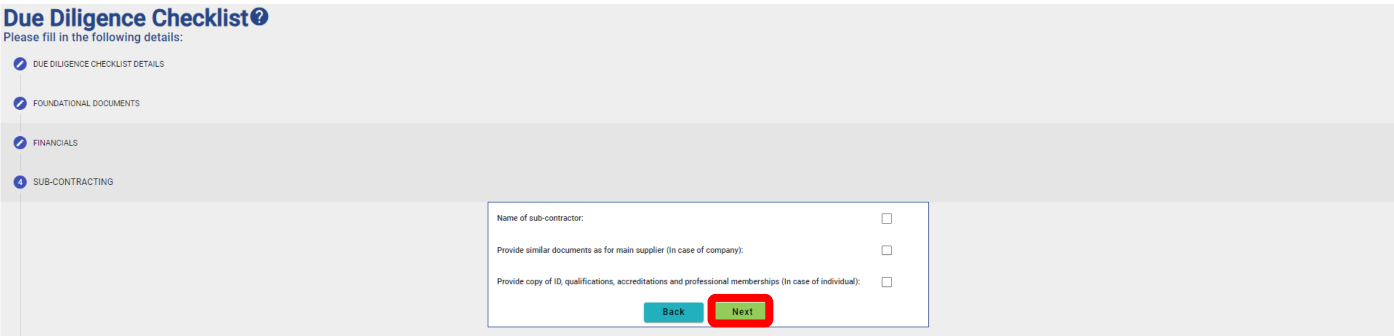


Figure 1 Click Next Sub-Contracting Approve Vendor Button Sole Supplier

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)**

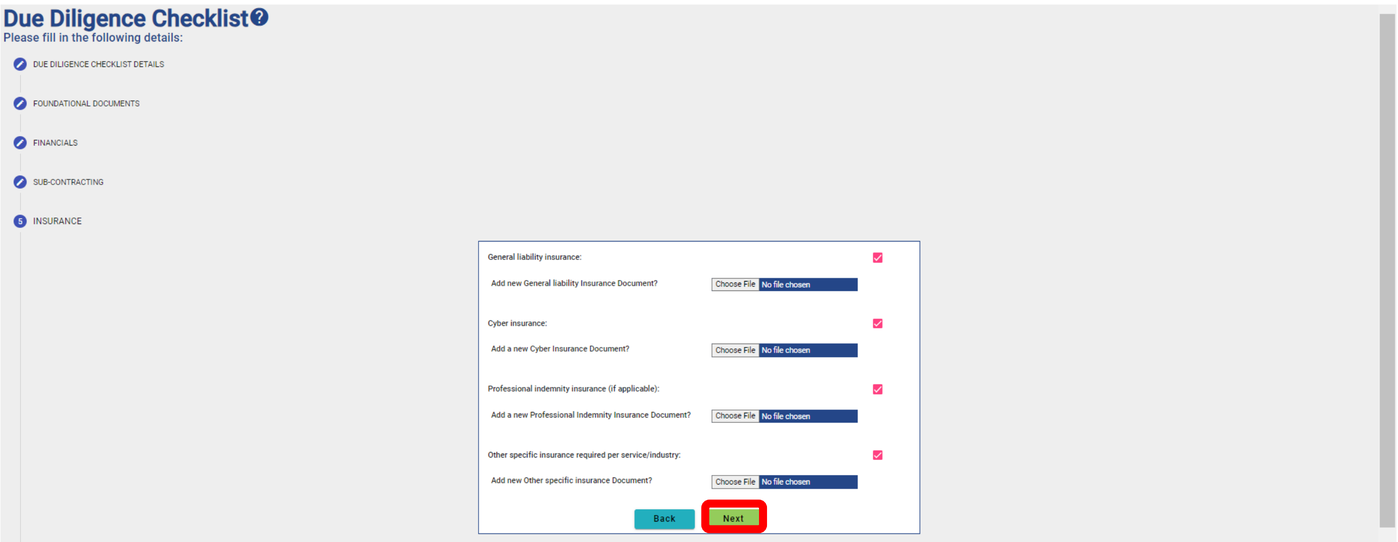


Figure 1 Click Next Insurance Approve Vendor Button Sole Supplier

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)**

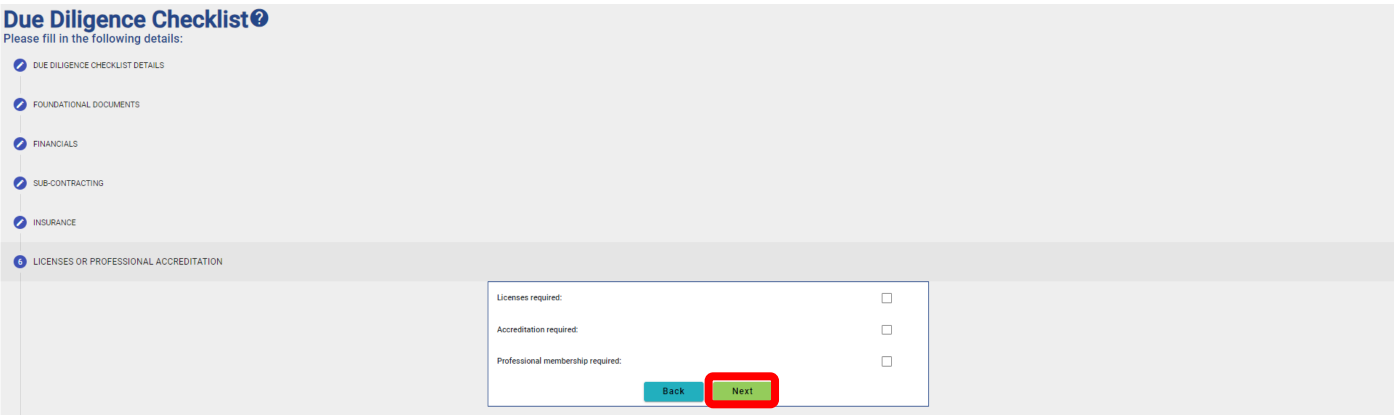


Figure 1 Click Next License or professional accreditation Approve Vendor Button Sole Supplier

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)**

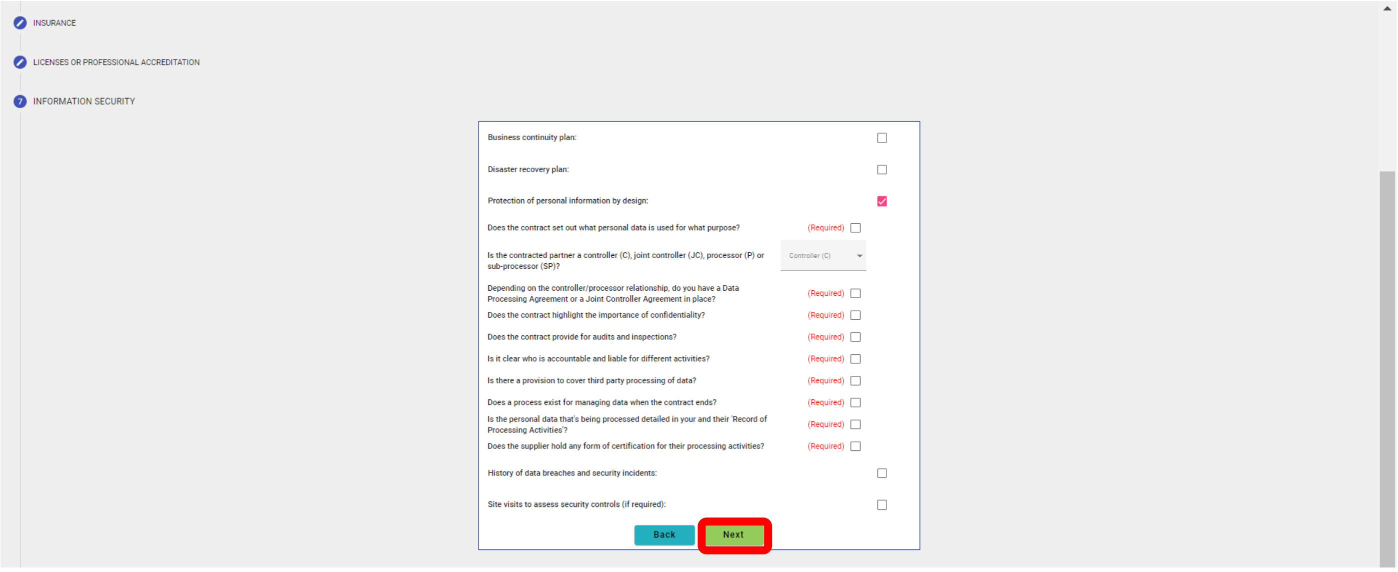


Figure 1 Click Next Information Security Approve Vendor Button Sole Supplier

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)**

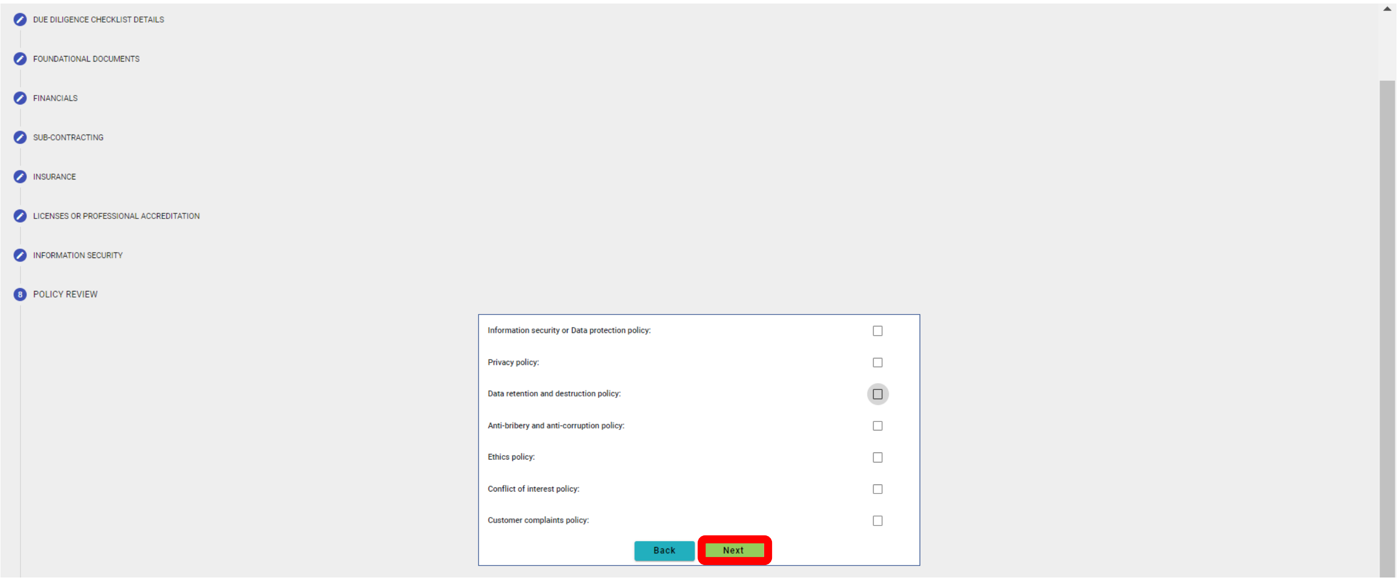

Figure 1 Click Next Policy Review Approve Vendor Button Sole Supplier

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)**

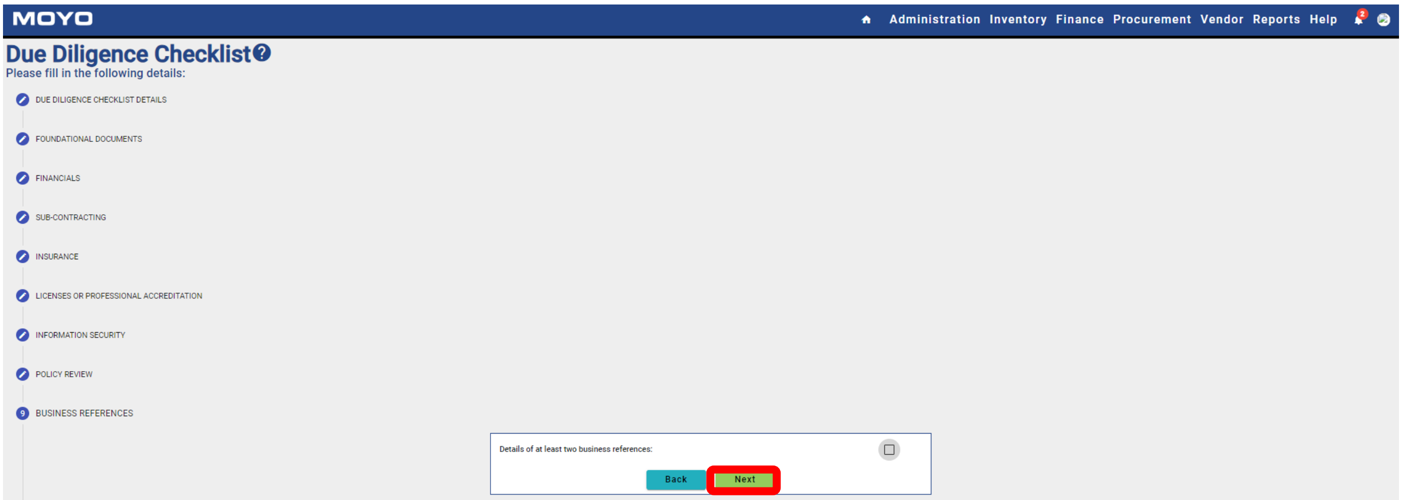


Figure 1 Click Next Business References Approve Vendor Button Sole Supplier

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.**

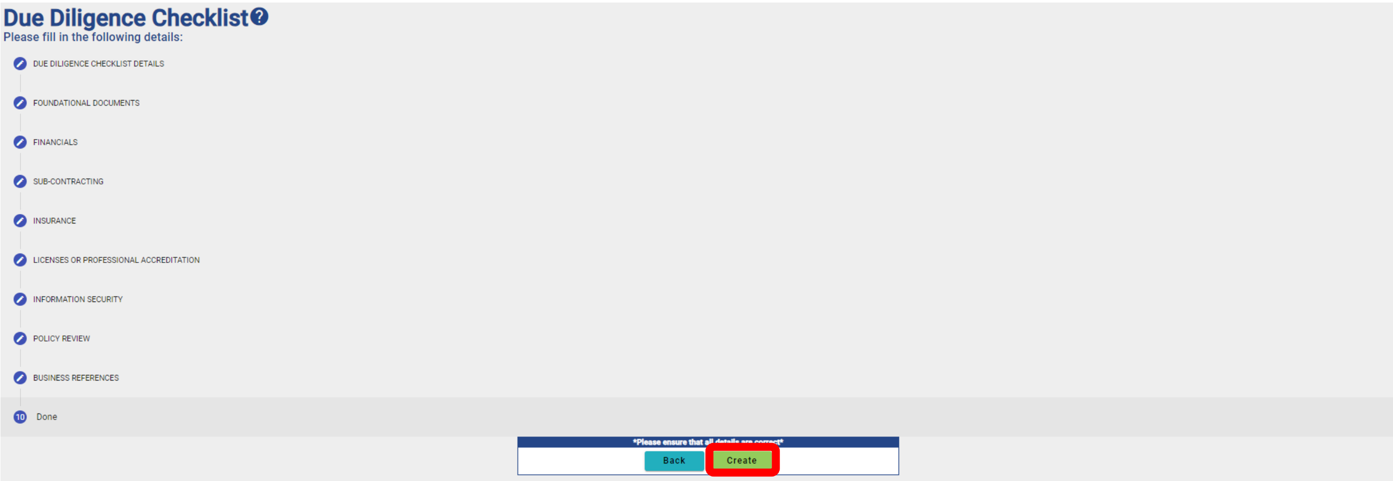


Figure 1 Click Create Done Approve Vendor Button Sole Supplier

## 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)**

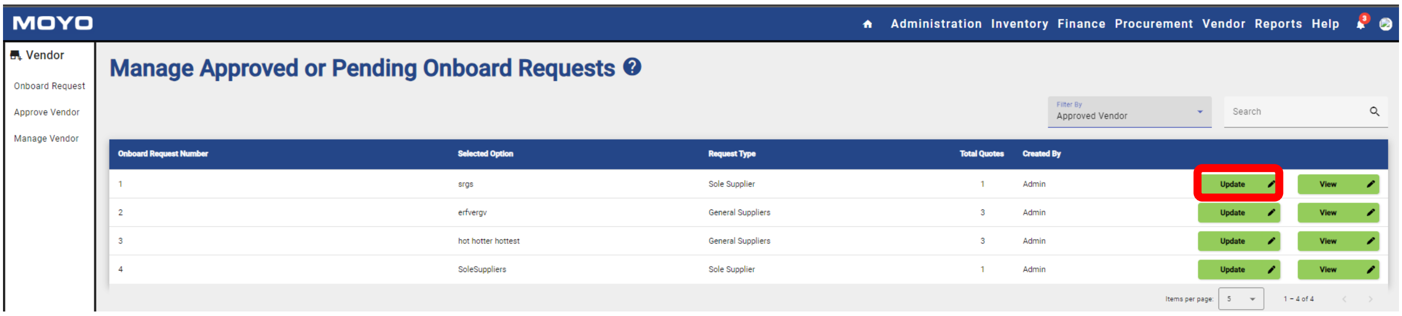


Figure 1 Click Update Approve Vendor Button

**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.**

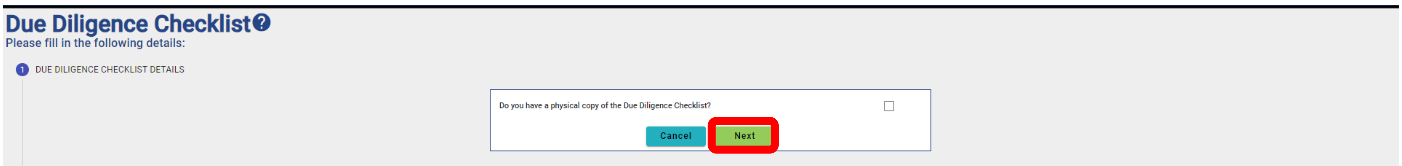


Figure 1 Click Next Due Diligence Checklist Details Update Approve Vendor Button

### 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)**

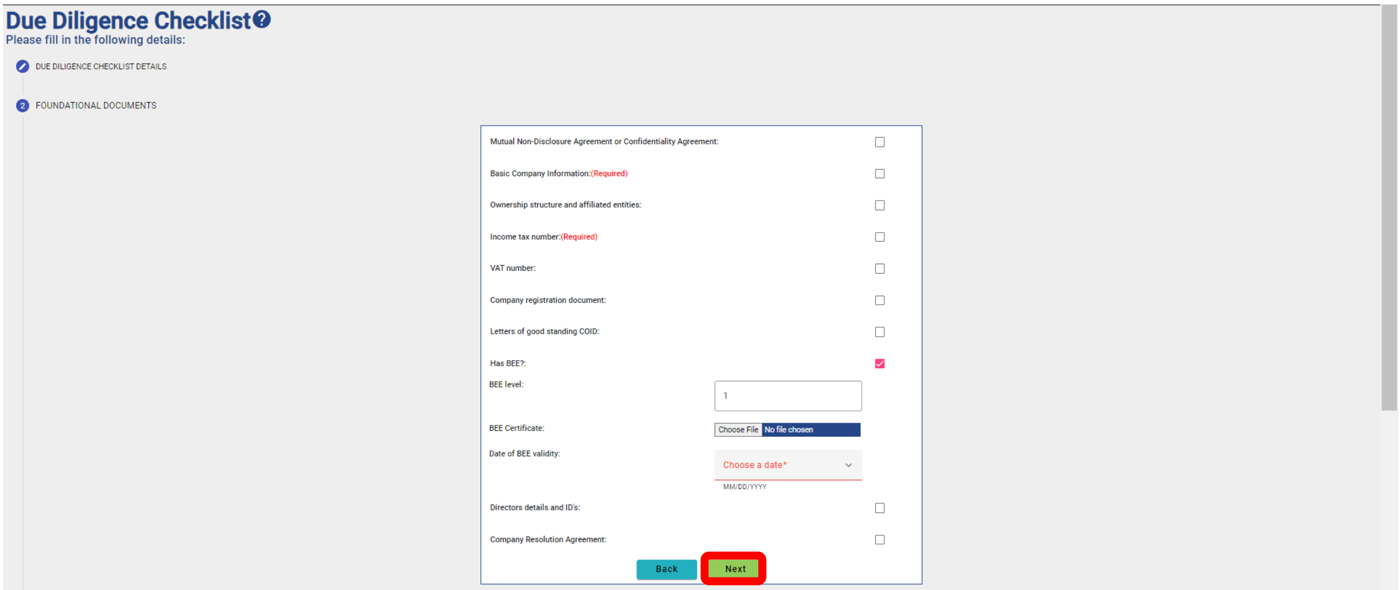


Figure 1 Click Next Foundational Documents Update Approve Vendor Button

1. “Mutual Non-Disclosure Agreement or Confidentiality Agreement”: Check the Checkbox if there is a mutual non-disclosure agreement of 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)**

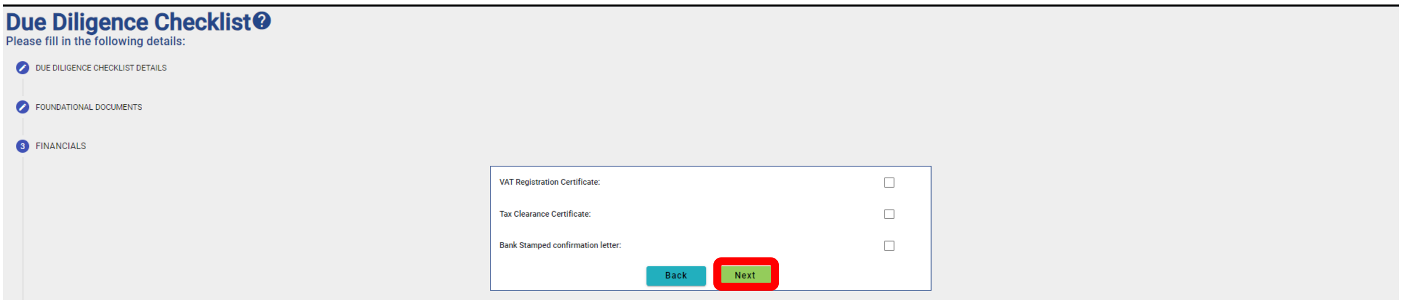


Figure 1 Click Next Financials Update Approve Vendor Button

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)**

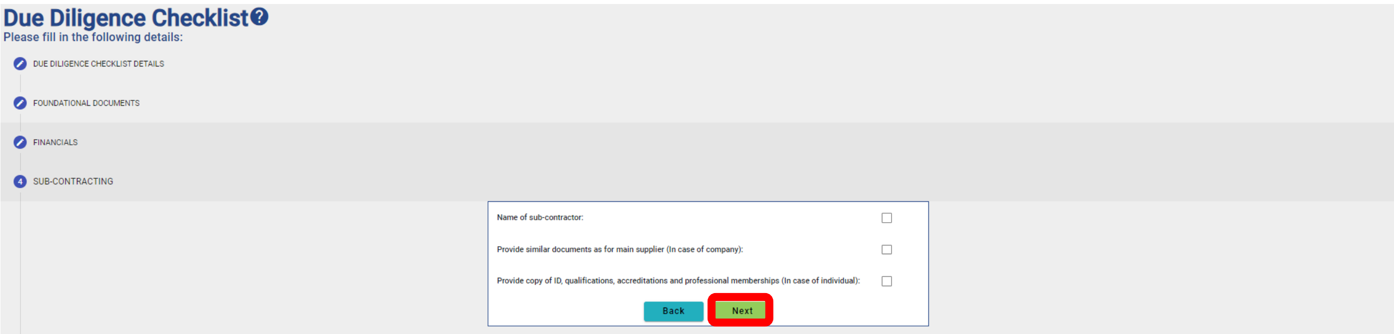


Figure 1 Click Next Sub-Contracting Update Approve Vendor Button

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)**

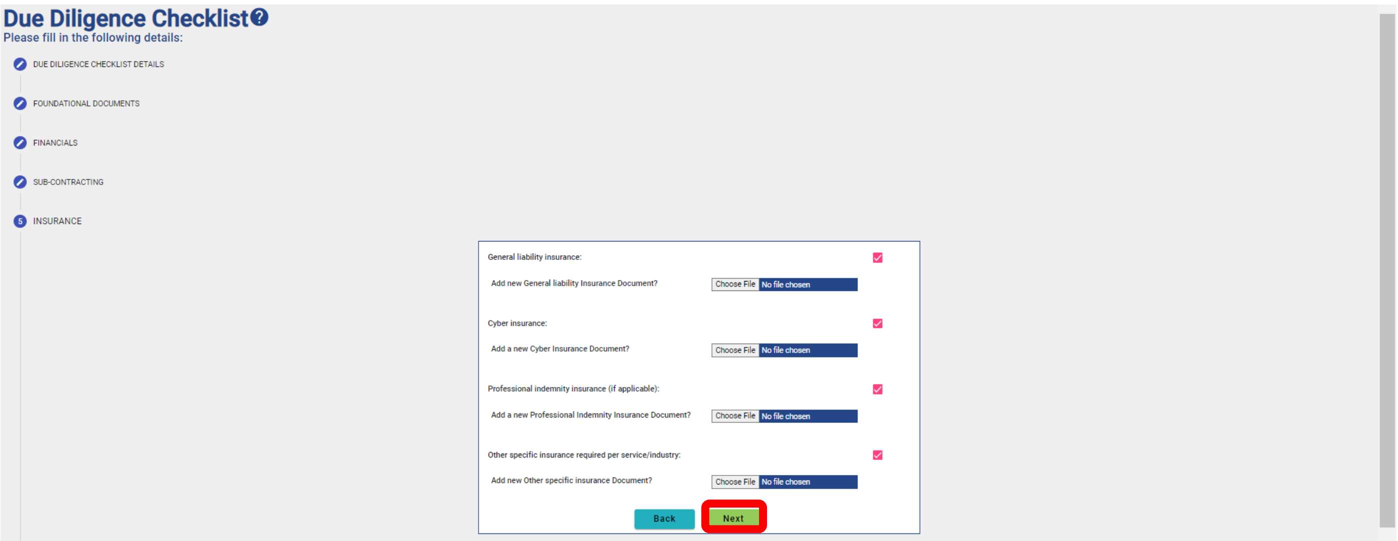


Figure 1 Click Next Insurance Update Approve Vendor Button

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)**

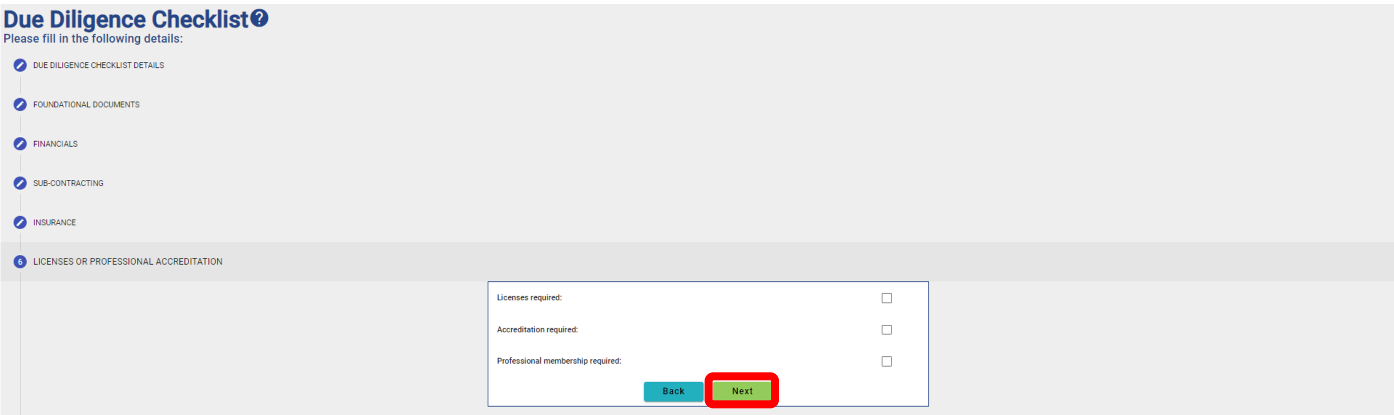


Figure 1 Click Next License or professional accreditation Update Approve Vendor Button

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)**

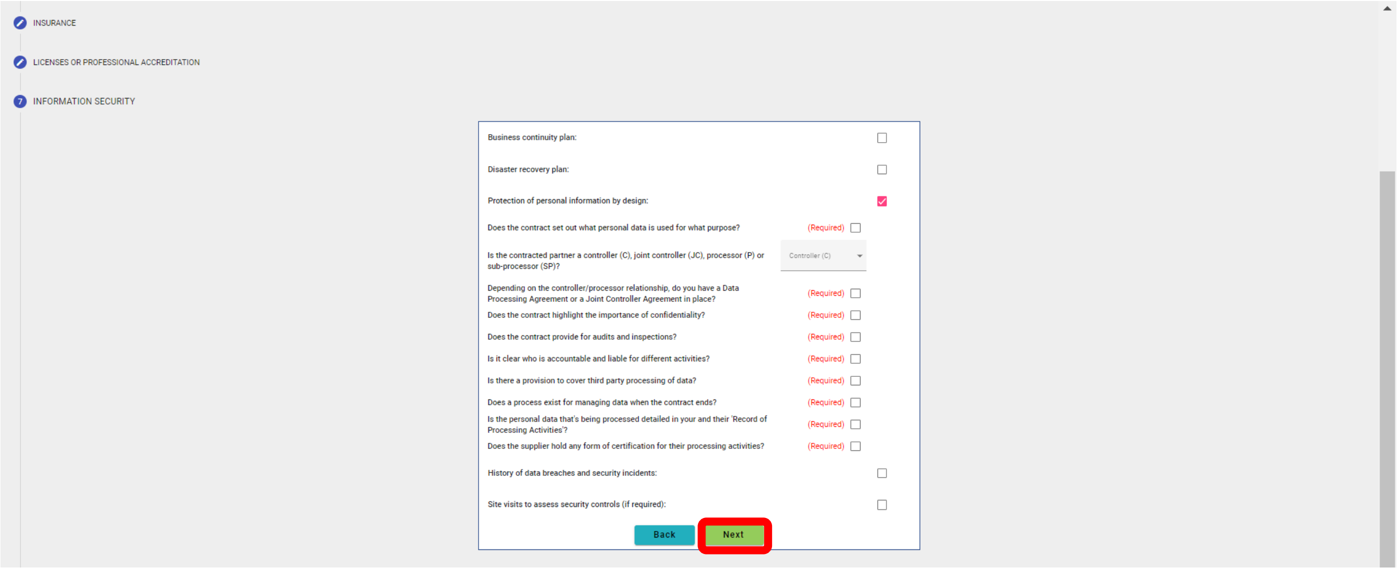


Figure 1 Click Next Information Security Update Approve Vendor Button

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)
    - "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)**

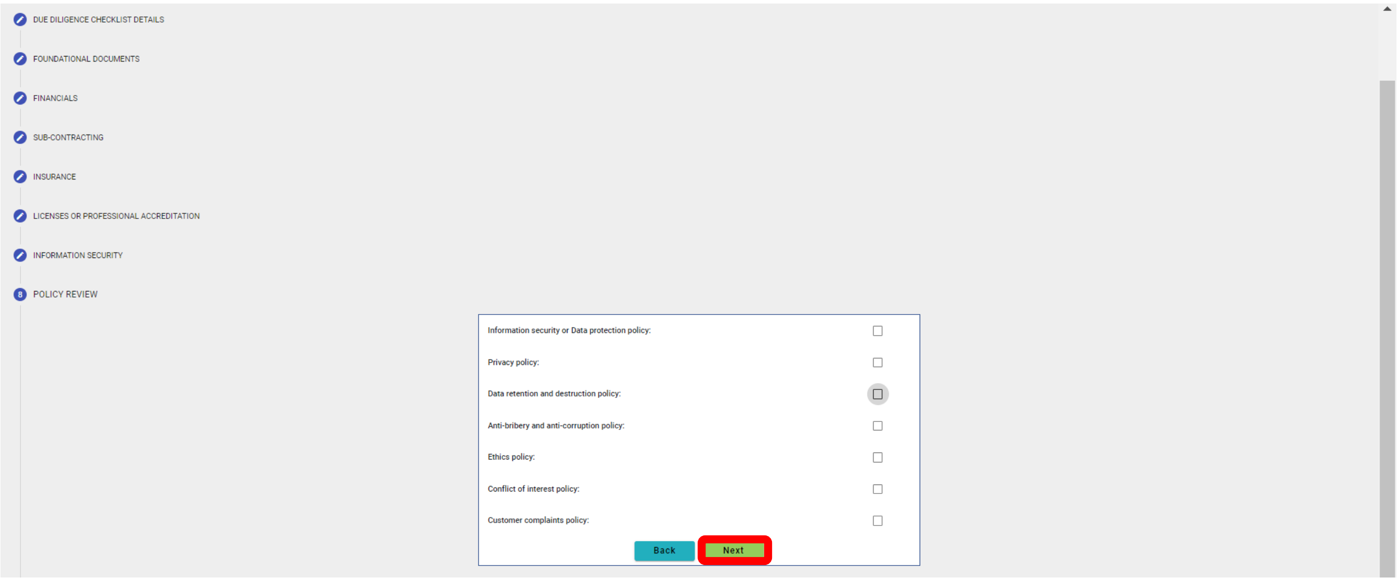

Figure 1 Click Next Policy Review Update Approve Vendor Button

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)**

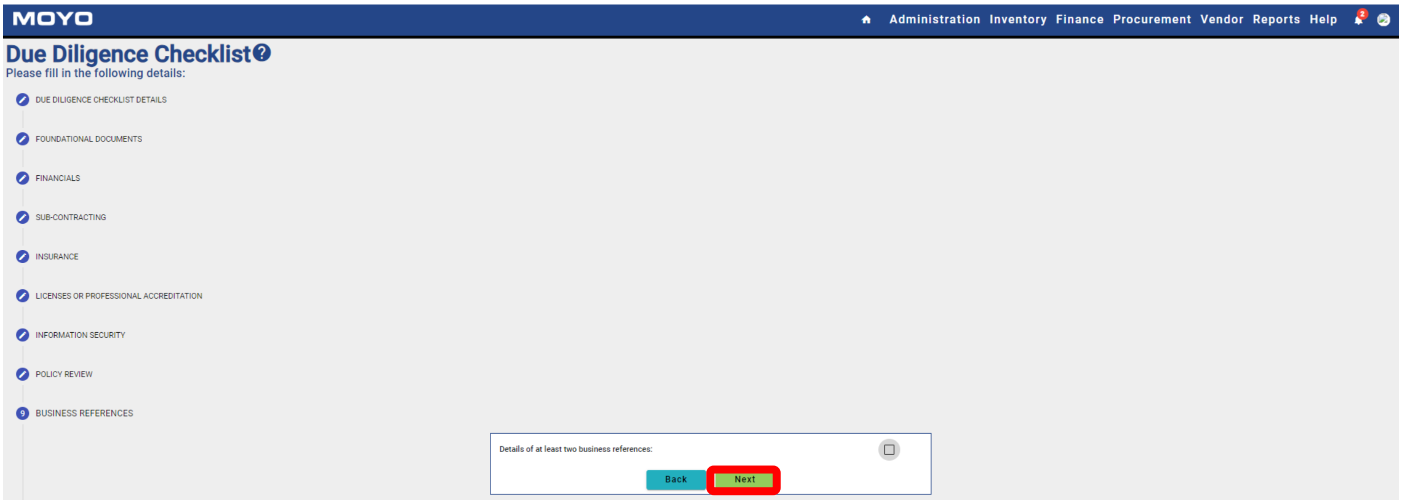


Figure 1 Click Next Business References Update Approve Vendor Button

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.**

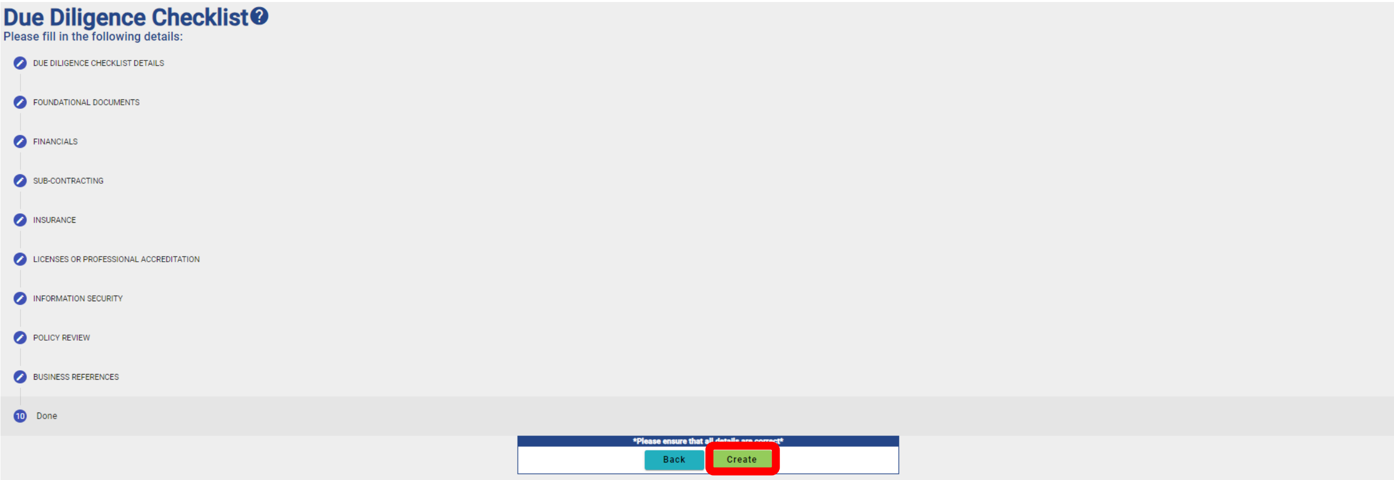


Figure 1 Click Create Done Update Approve Vendor Button

## 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)**

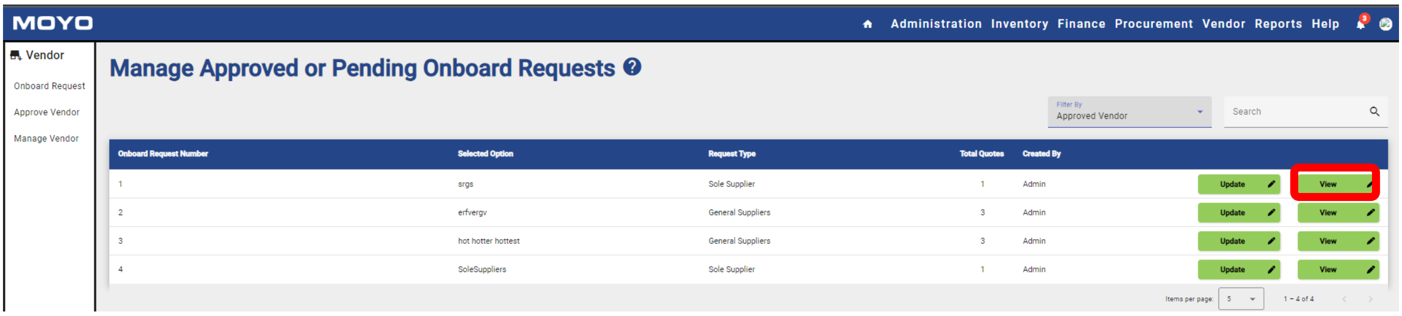


Figure 1 Click View Approve Vendor Button

**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.**

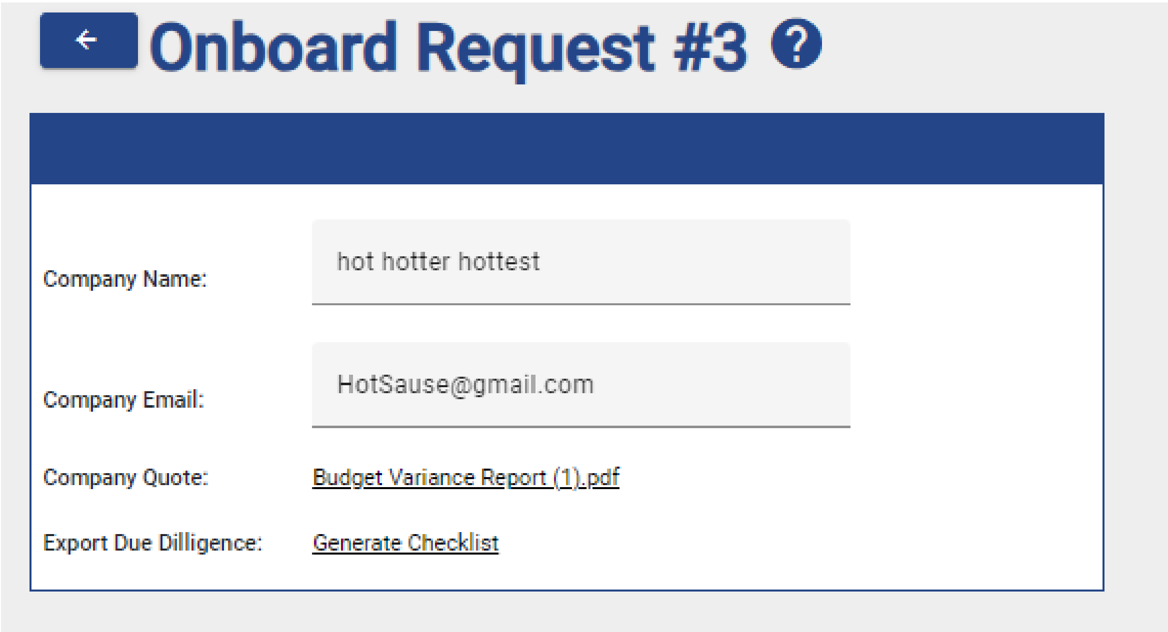


Figure 1 view Approved Vendor Details

# 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:**

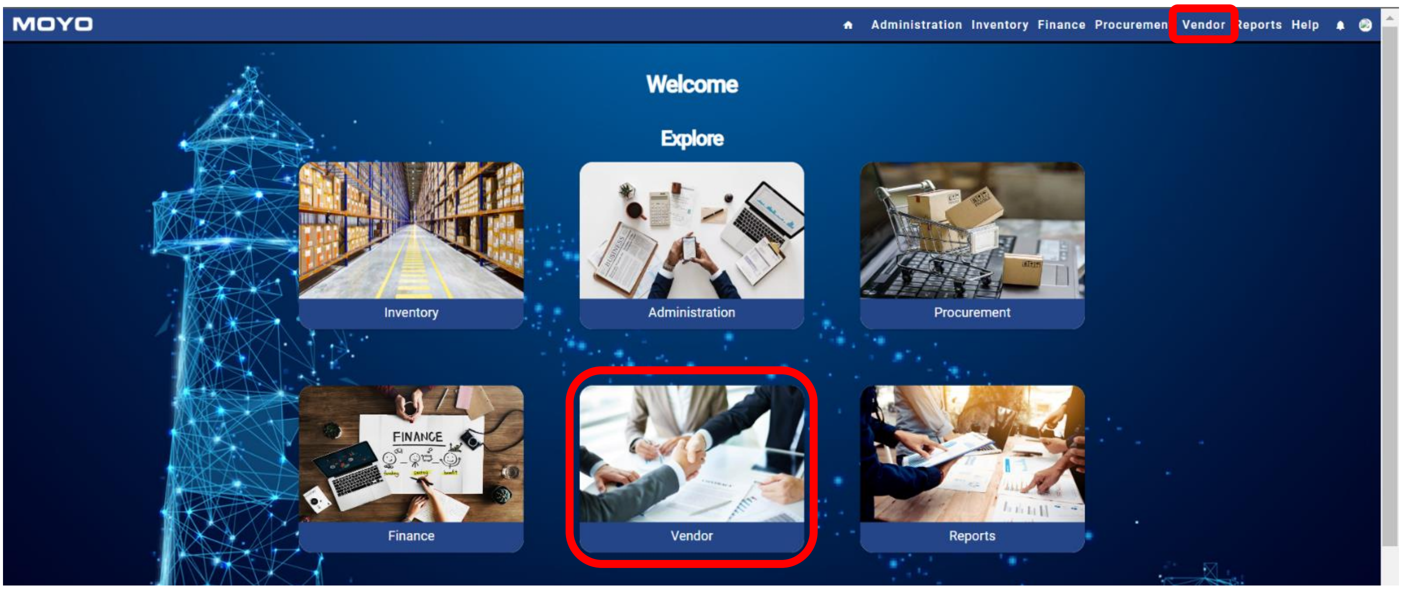


Figure 1 Home Screen to Manage Vendor Screen

**Then Click on the "Manage Vendor" button on the Vendor side navbar:**

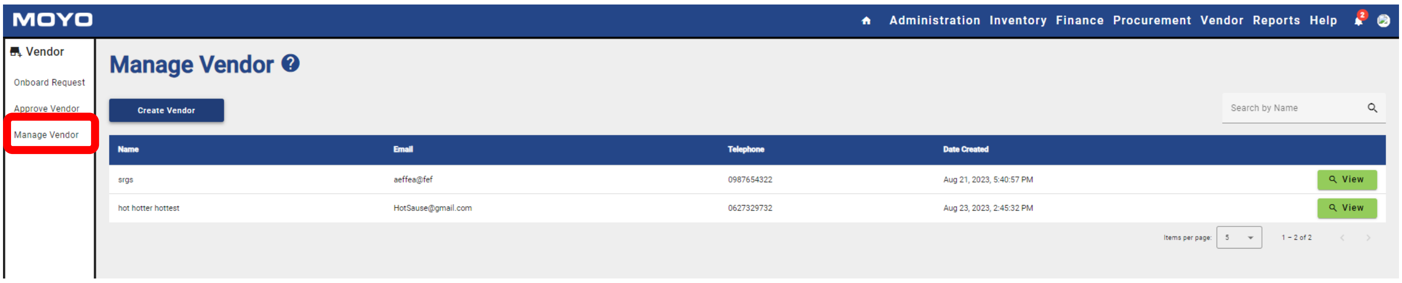


Figure 1 Vendor side nav to Manage Vendor Screen

## Step 2 Create Vendor:

**Create a new Vendor by clicking on the "Create Vendor" button on the Manage Vendor screen:**

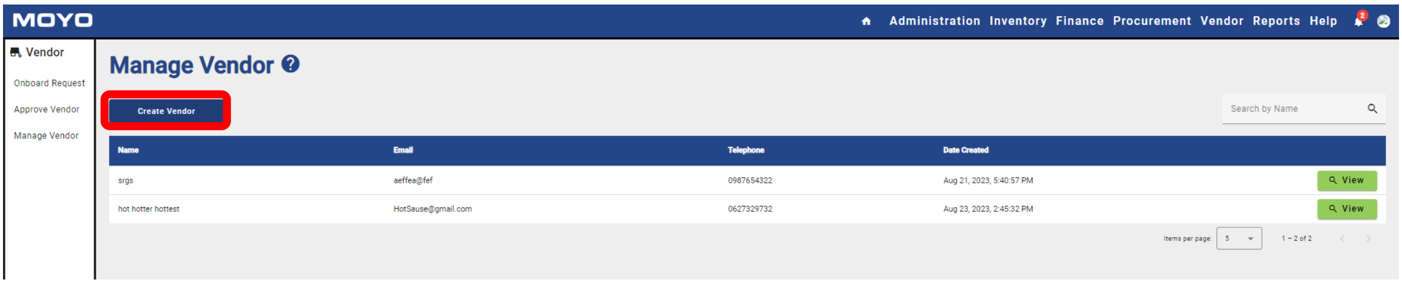


Figure 1 Click Create Vendor Button

**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.**

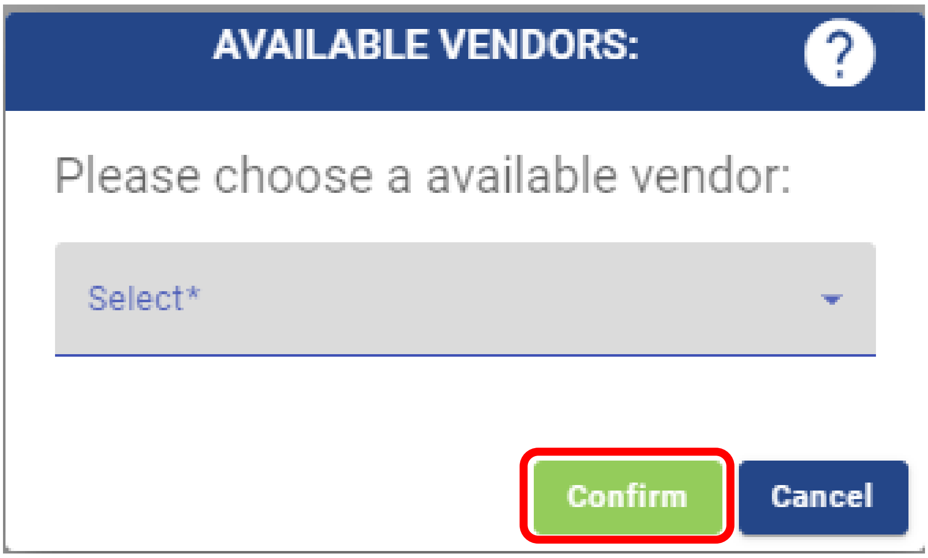


Figure 1 Click Confirm Create Vendor Button

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 check opens up more fields that are required until the checkbox is unchecked again)**

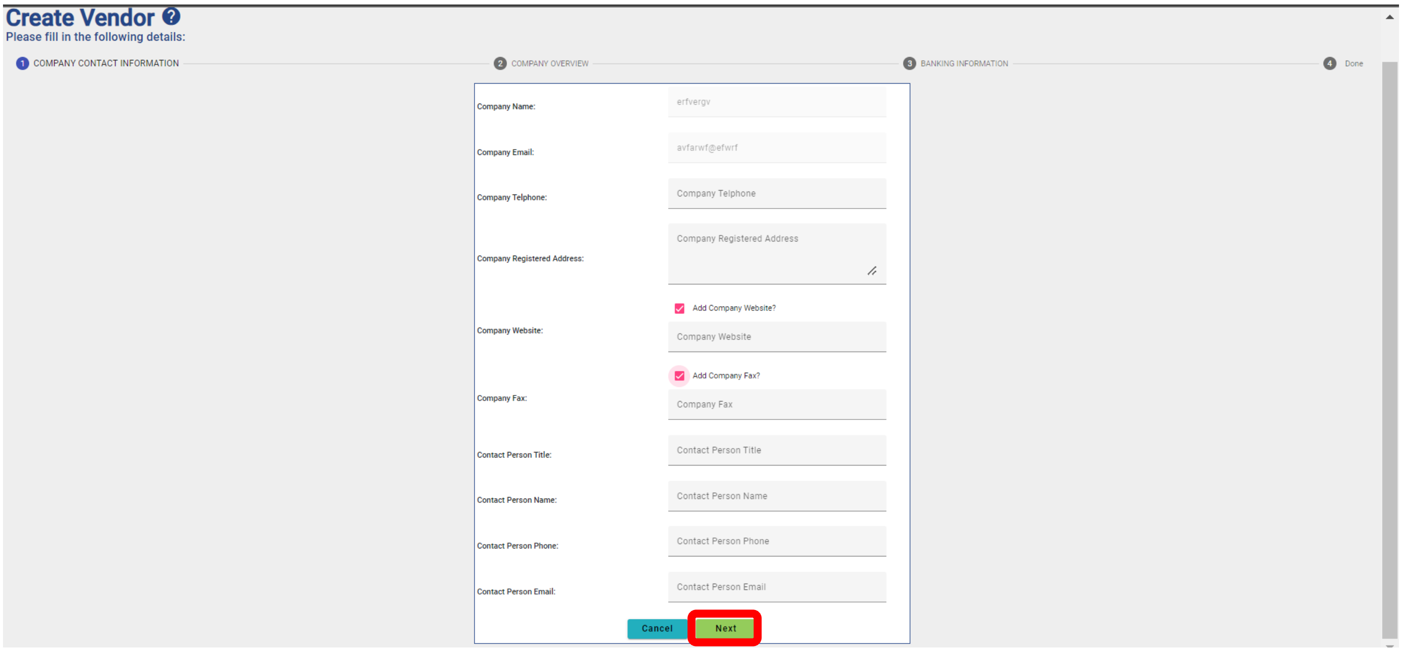


Figure 1 Create Vendor Company Contact Information Step 1 Click Next button.

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

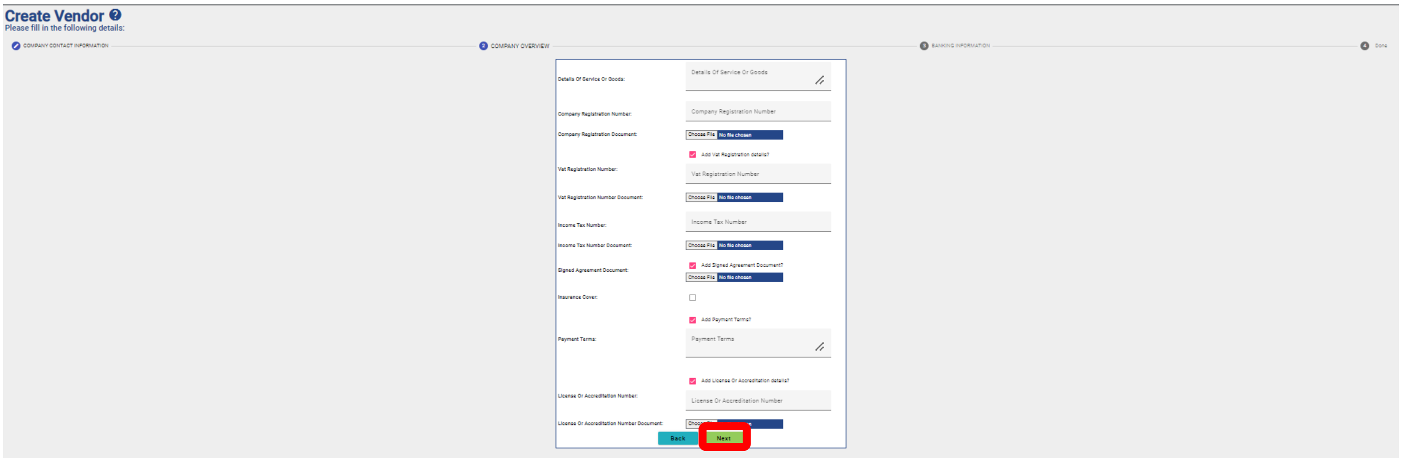


Figure 1 Create Vendor Company Overview Step 2 Click Next button.

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.**

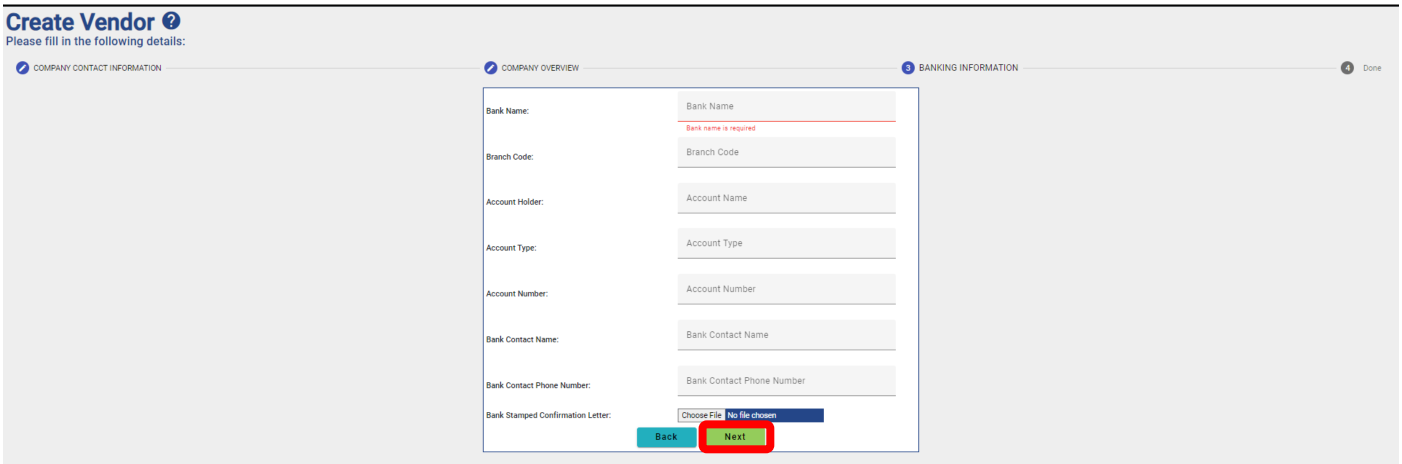


Figure 1 Create Vendor Banking Information Step 3 Click Next button.

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.**

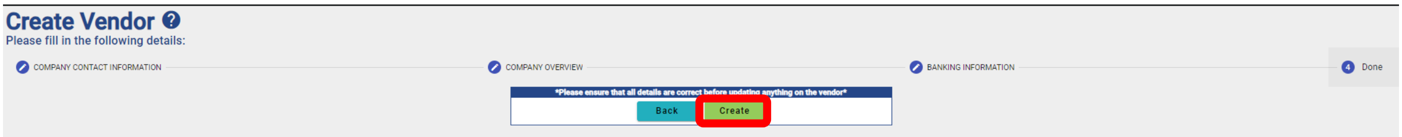


Figure 1 Create Vendor Done Step 4 Click Next button.

## 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)**

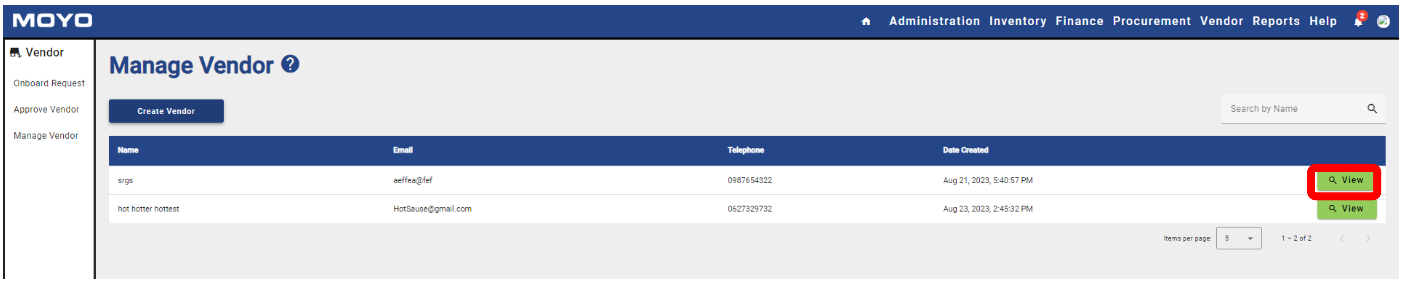


Figure 1 Click View Edit Vendor Button.

**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)**

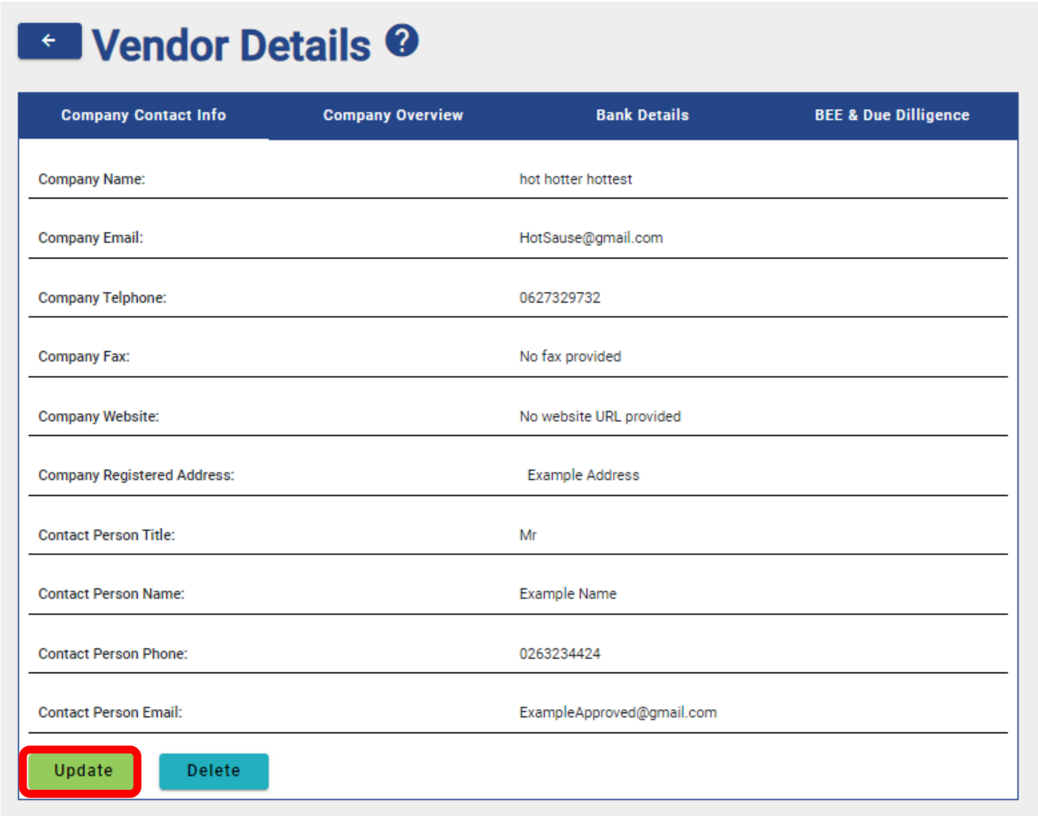


Figure 1 Click Update Edit Vendor Details Button

**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)**

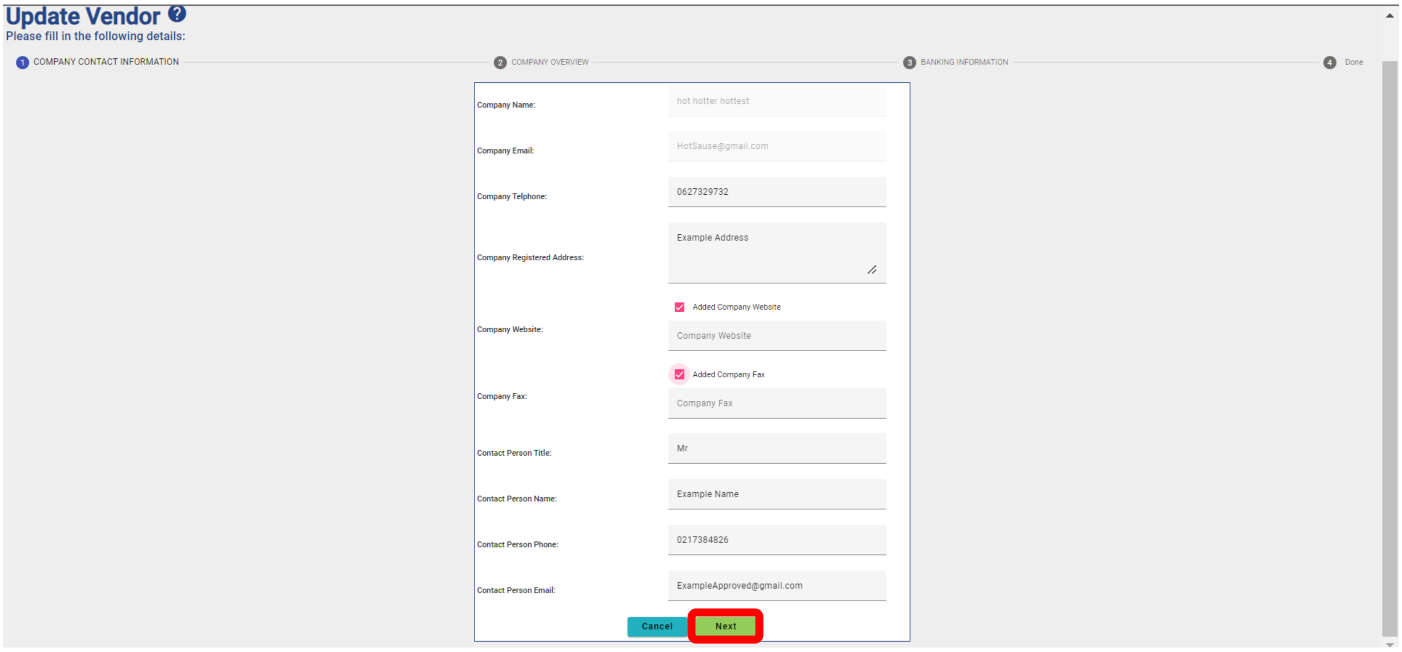


Figure 1 Edit Vendor Company Contact Information Step 1 Click Next button.

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)**

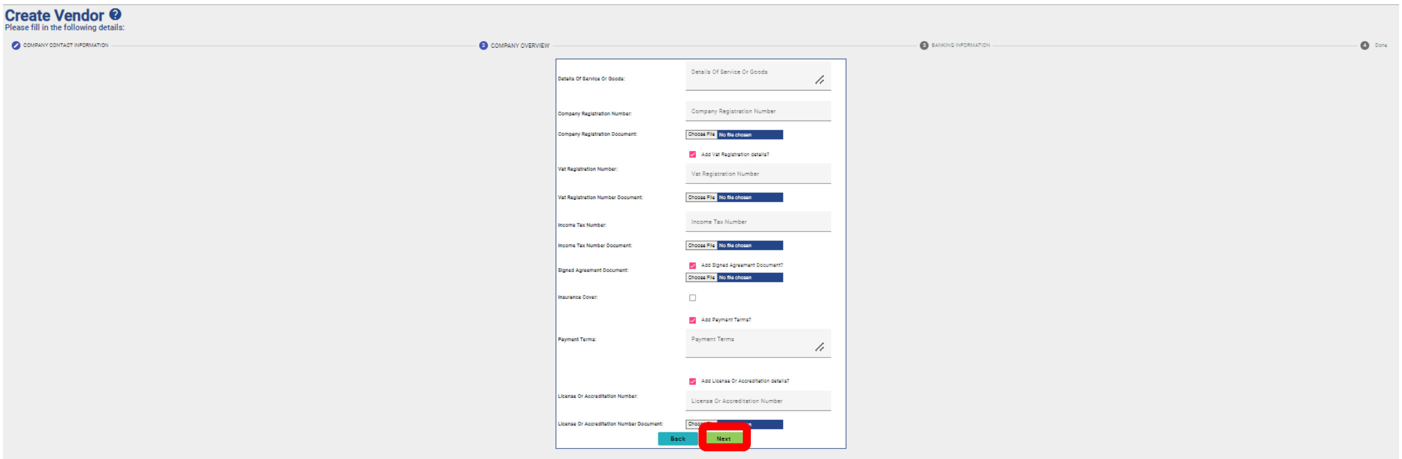


Figure 1 Edit Vendor Company Overview Step 2 Click Next button.

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.**

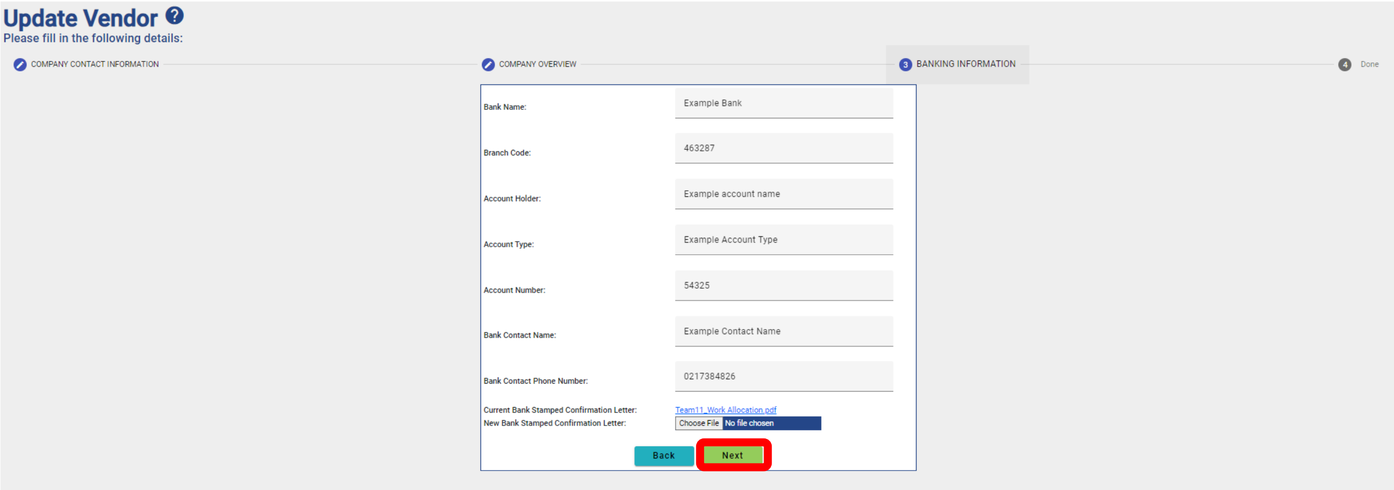


Figure 1 Edit Vendor Banking Information Step 3 Click Next button.

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.**

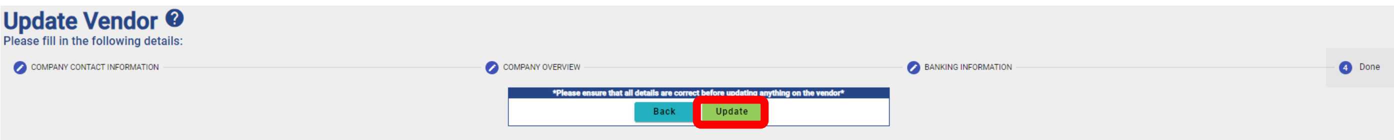


Figure 1 Edit Vendor Done Step 4 Click Next button.

## 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)**

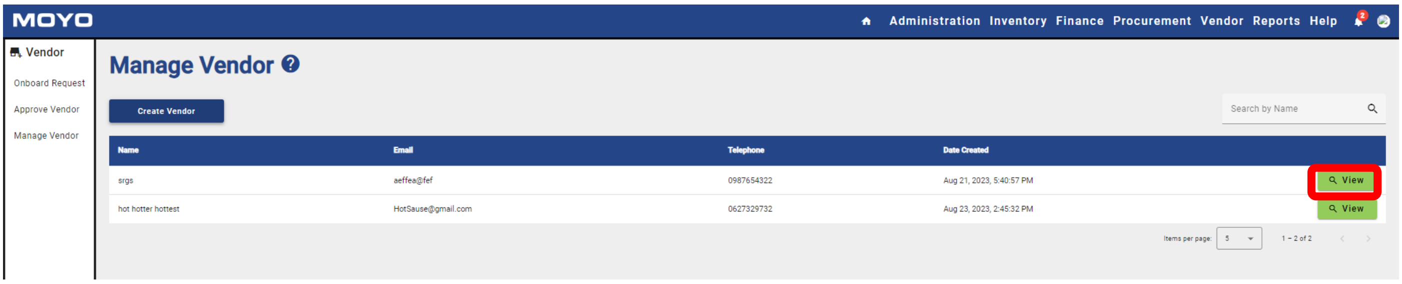


Figure 1 Click View Delete Vendor Button.

**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.**

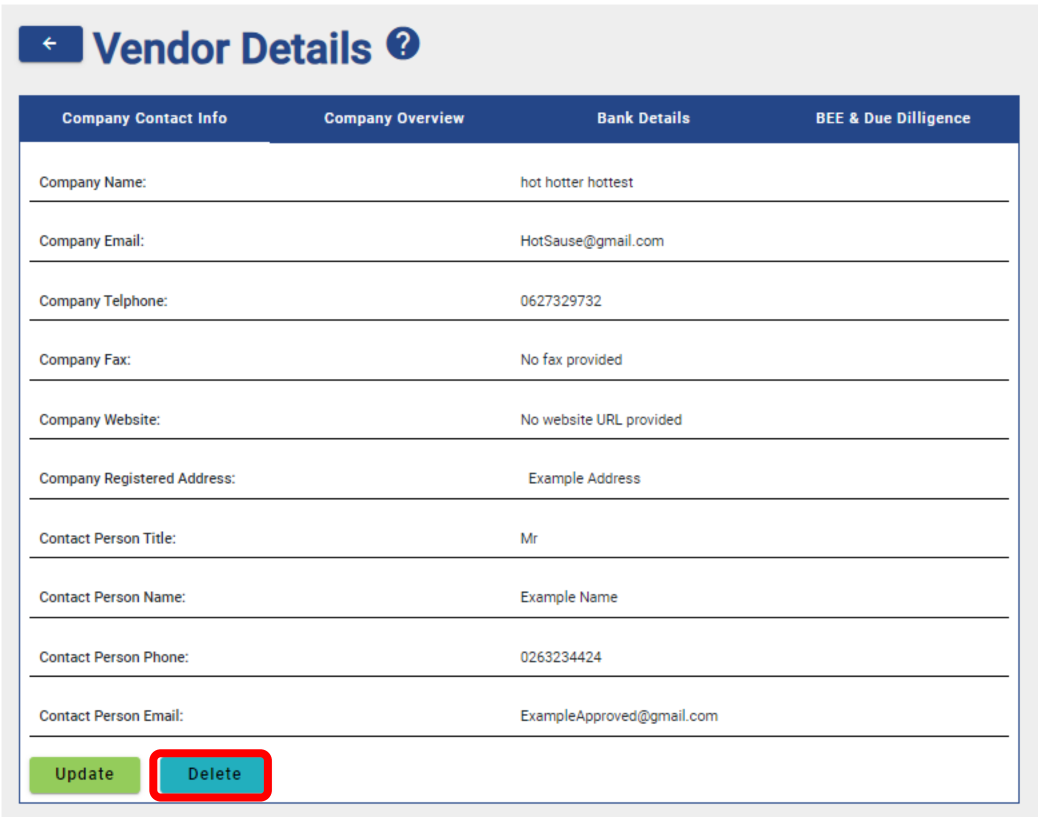


Figure 1 Click Delete Vendor Details Button

**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.**

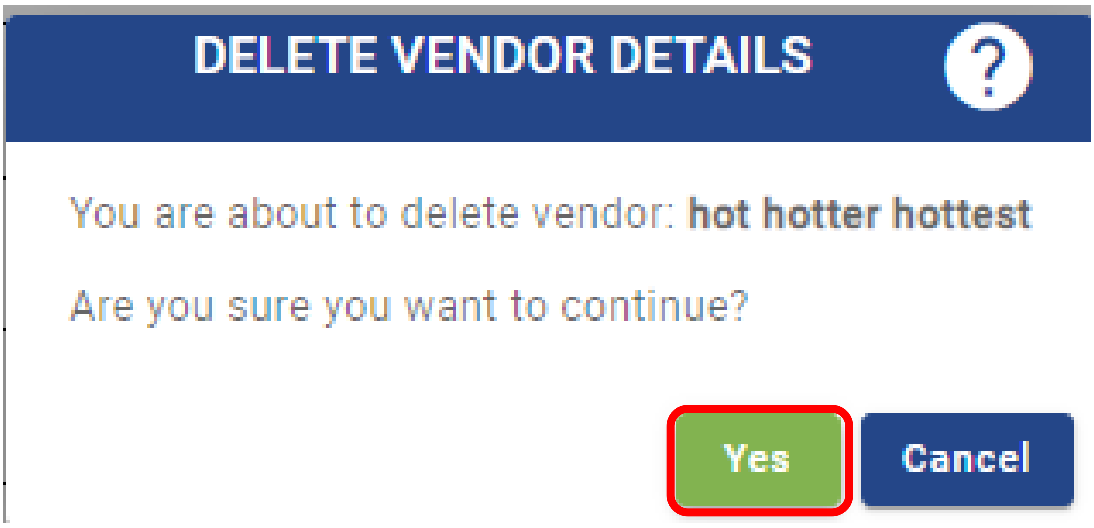


Figure 1 Click Yes Delete Vendor Button.

## 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)**

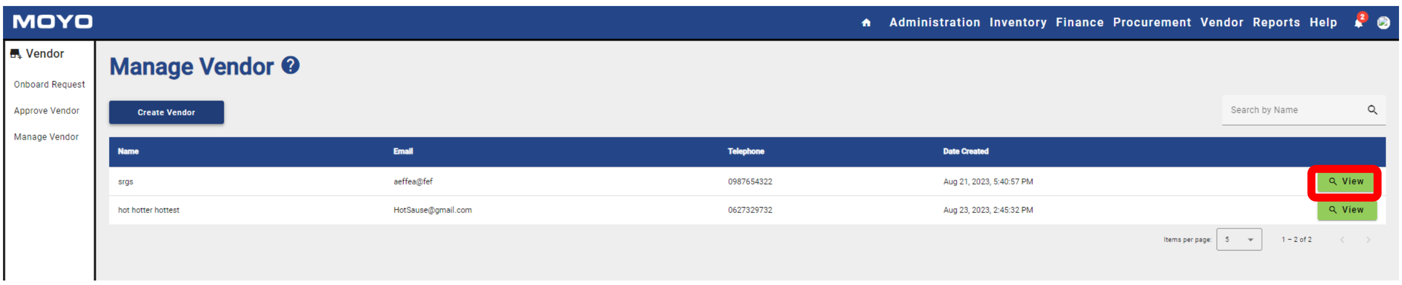


Figure 1 Click View Add BEE Details Vendor Button.

**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.**

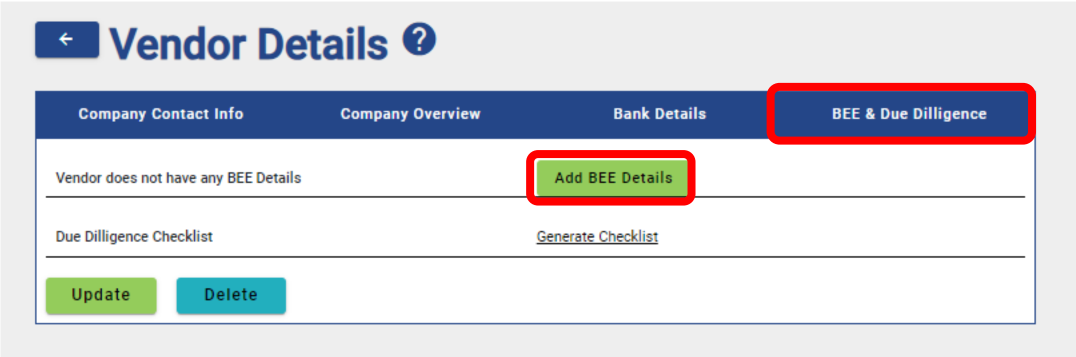


Figure 1 Click Add BEE Details Vendor Button

**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)**

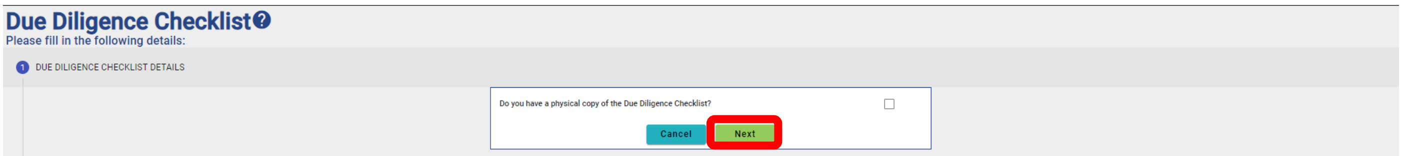


Figure 1 Click Next Due Diligence Checklist Details Vendor Button.

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)**

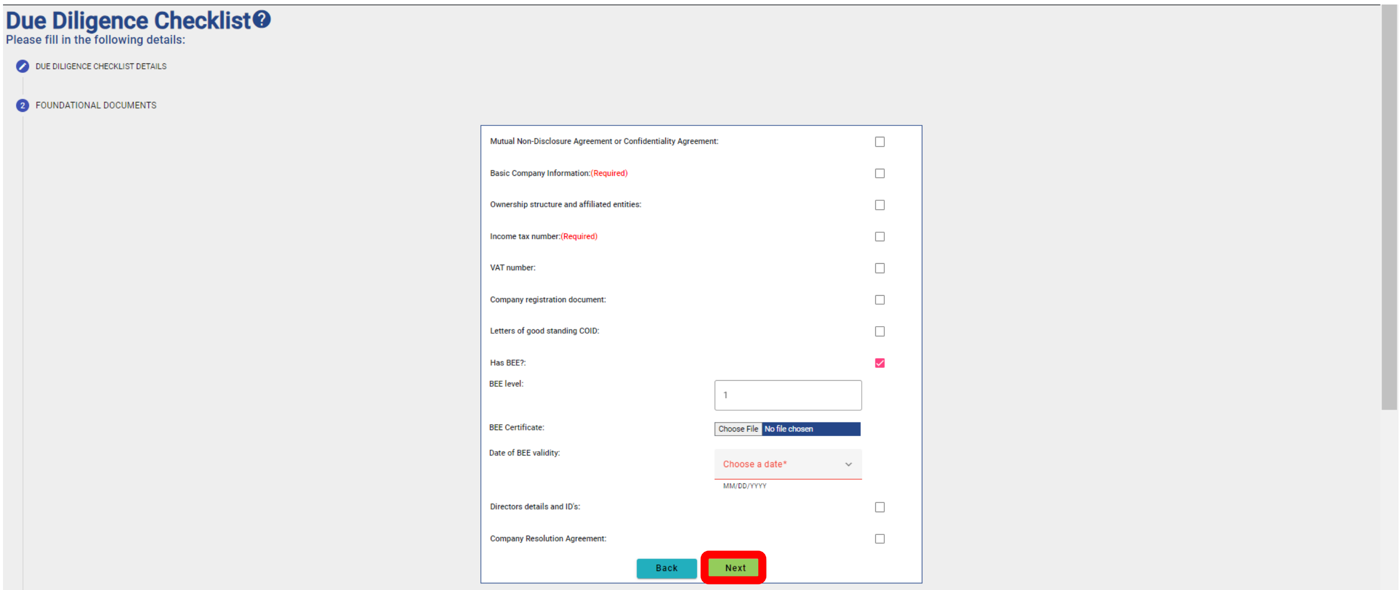


Figure 1 Click Next Foundational Documents Vendor Button.

1. "Mutual Non-Disclosure Agreement or Confidentiality Agreement": Check the Checkbox if there is a mutual non-disclosure agreement of 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)**

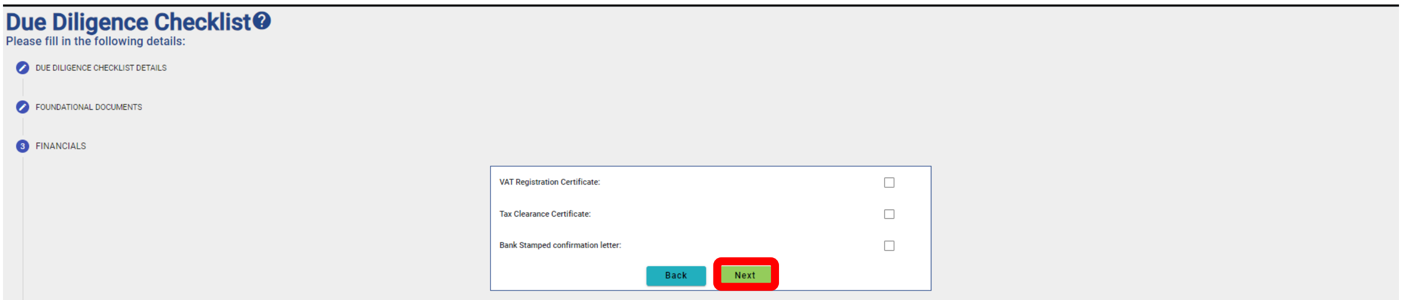


Figure 1 Click Next Financials Vendor Button.

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)**

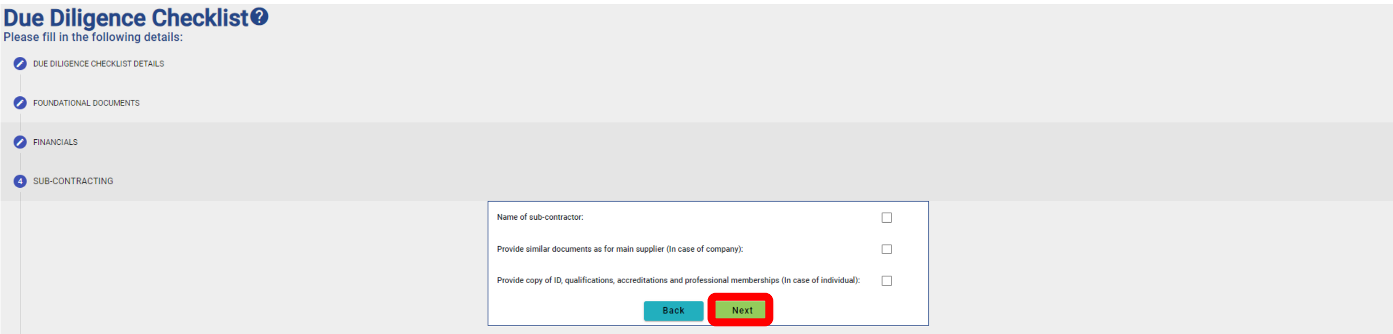


Figure 1 Click Next Sub-Contracting Vendor Button.

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)**

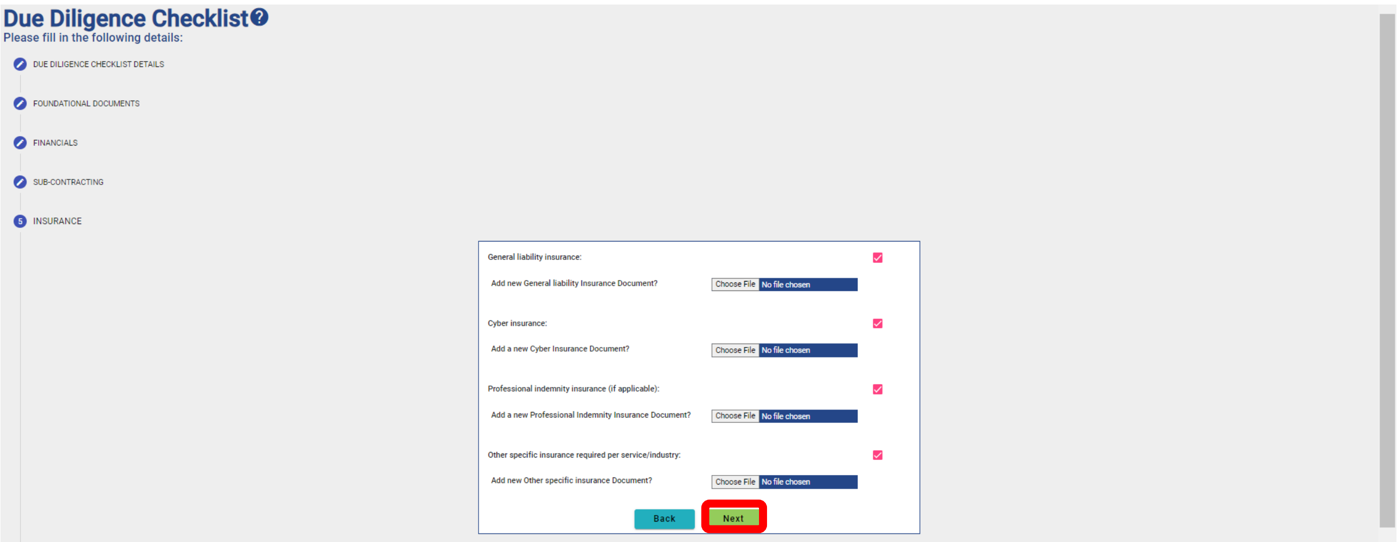


Figure 1 Click Next Insurance Vendor Button.

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)**

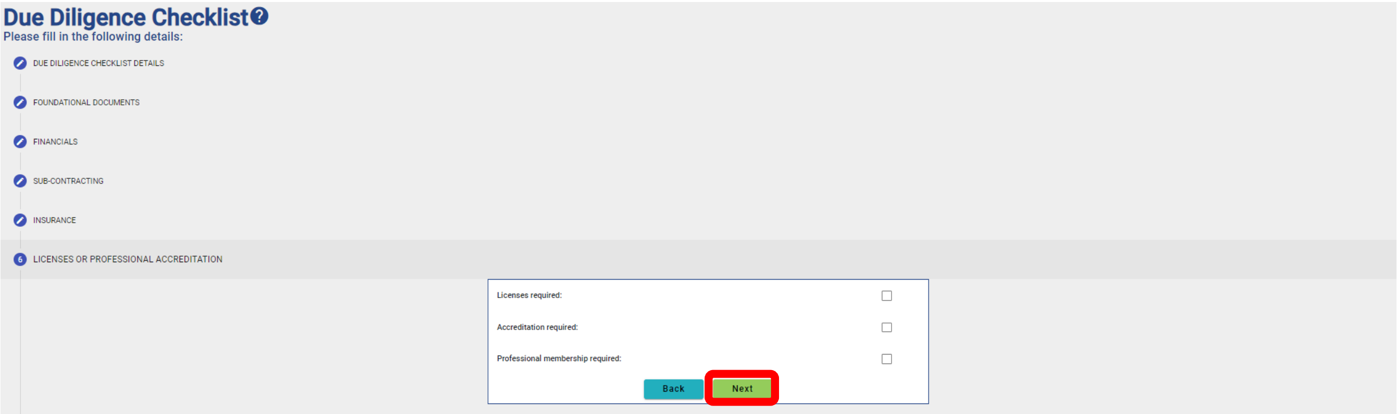


Figure 1 Click Next License or professional accreditation Vendor Button.

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)**

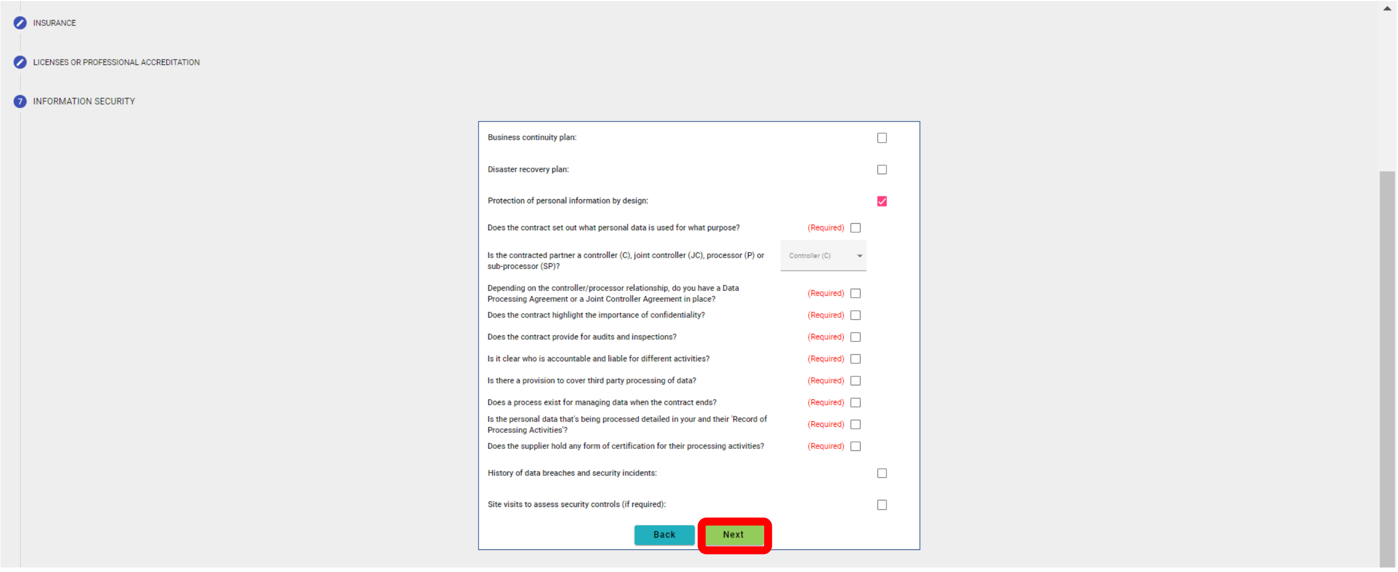


Figure 1 Click Next Information Security Vendor Button.

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)

- “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)**

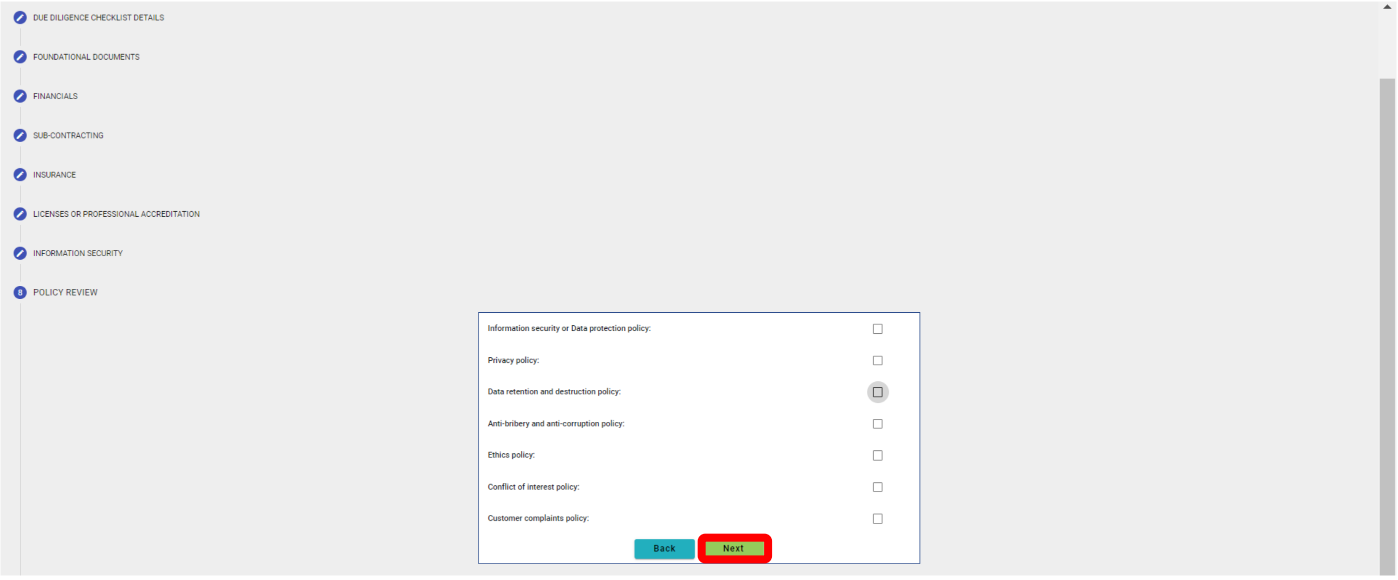


Figure 1 Click Next Policy Review Vendor Button.

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)**

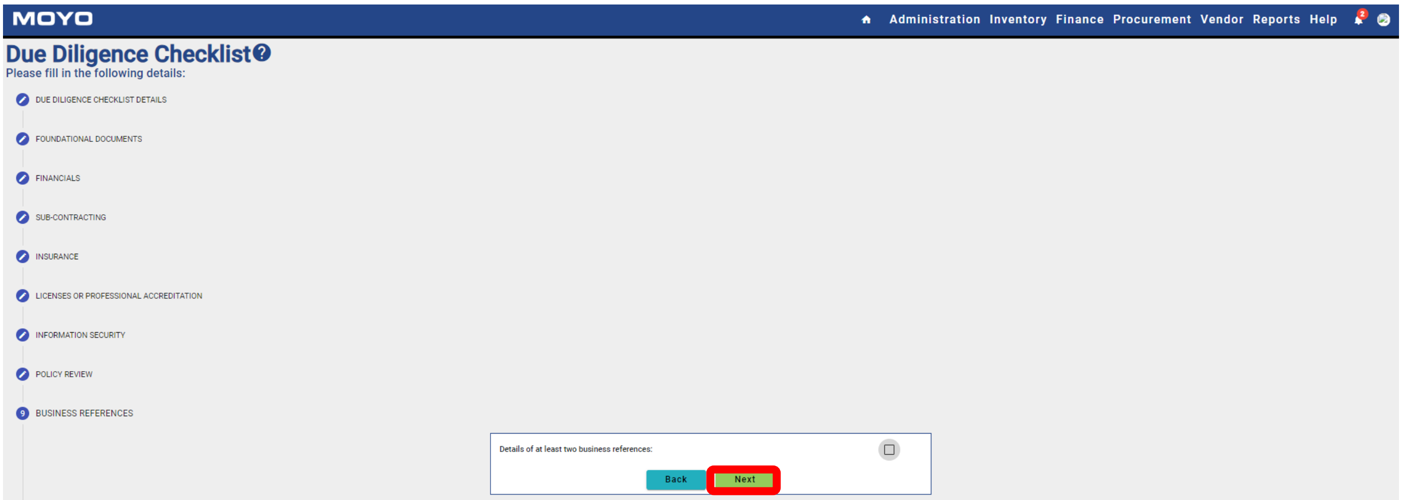


Figure 1 Click Next Business References Vendor Button.

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.**

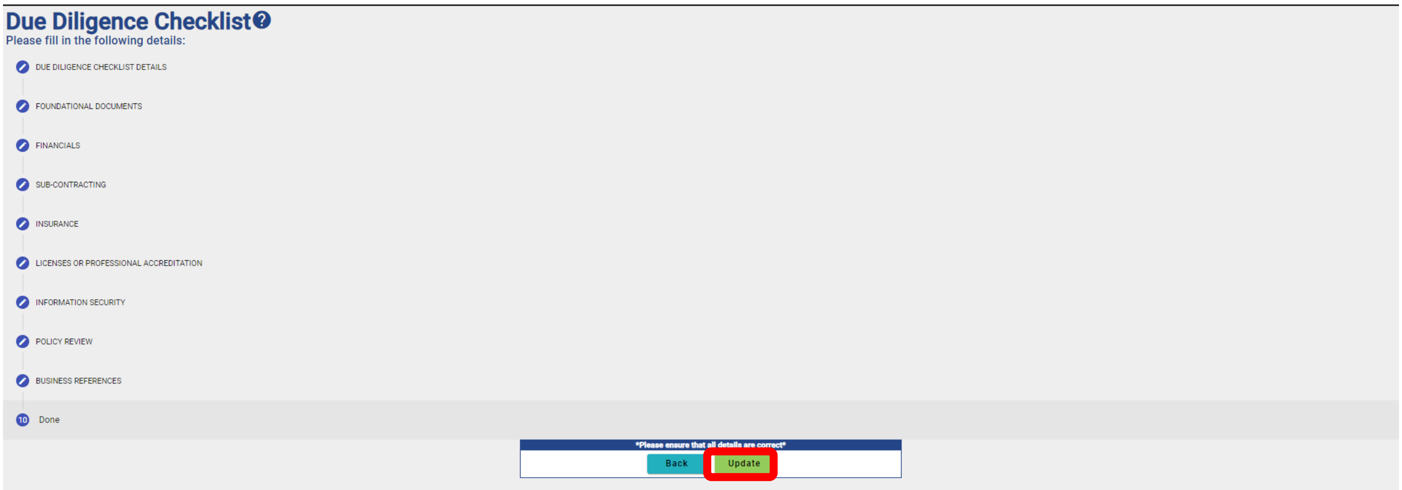


Figure 1 Click Update Done Vendor Button.

# 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:**

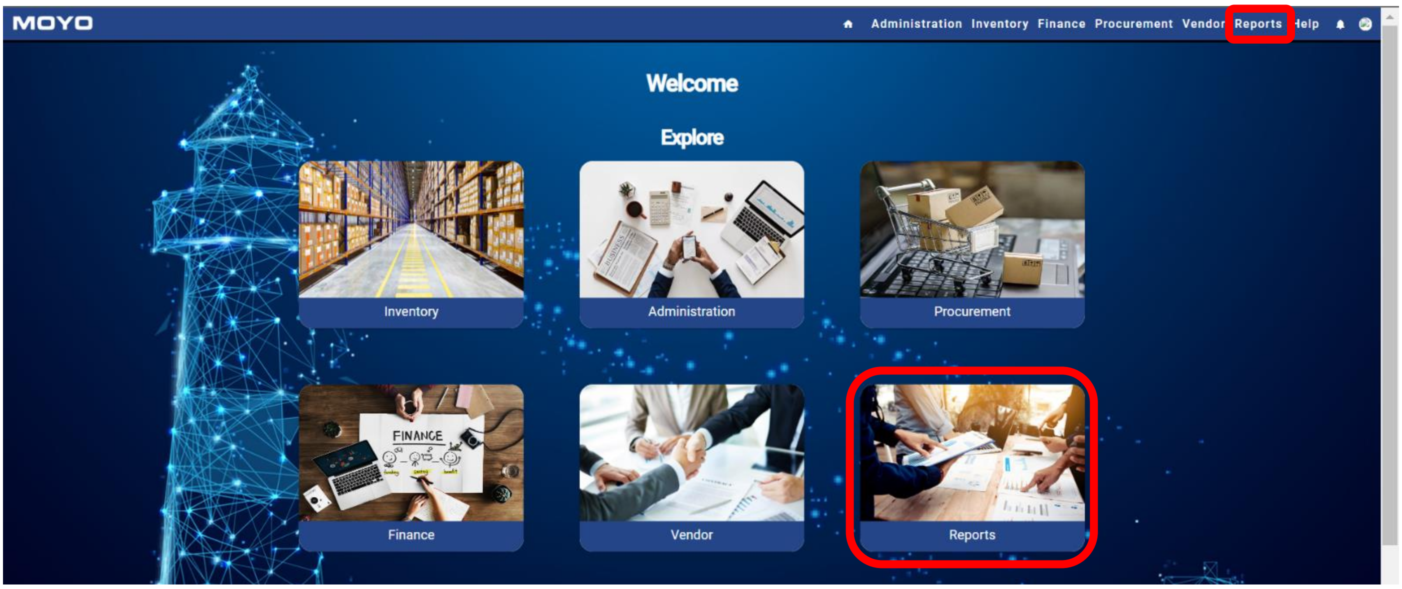


Figure 1 Home Screen to Report Screen


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.**

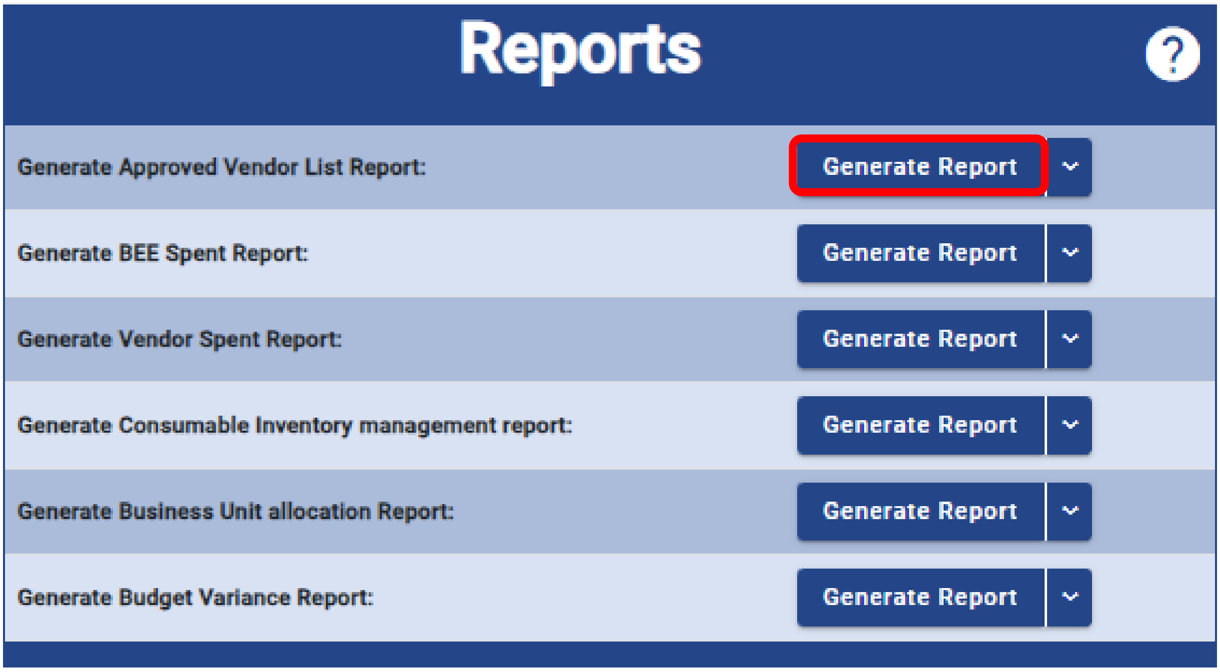


Figure 1 Generate Approved Vendor

**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

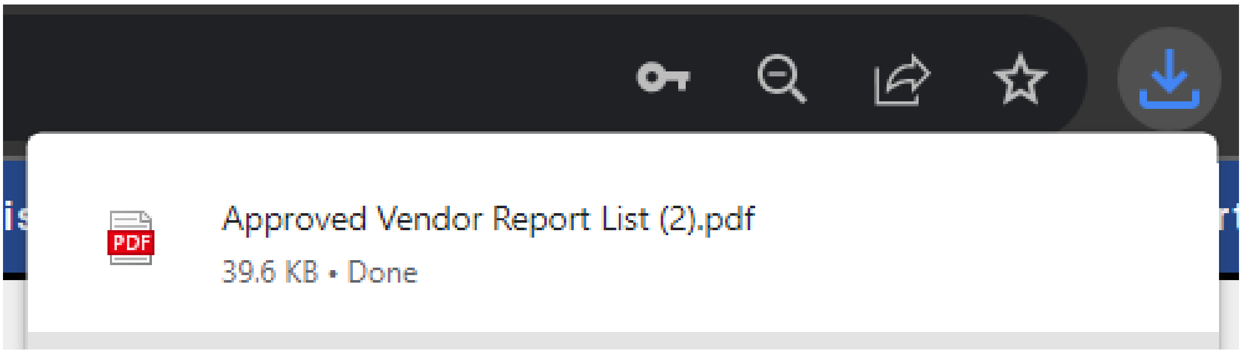


Figure 1 Download Approved Vendor Report

## Step 3 Generate BEE Spend report:

**Then Click on the "Generate" button on the Generate BEE Spend row:**

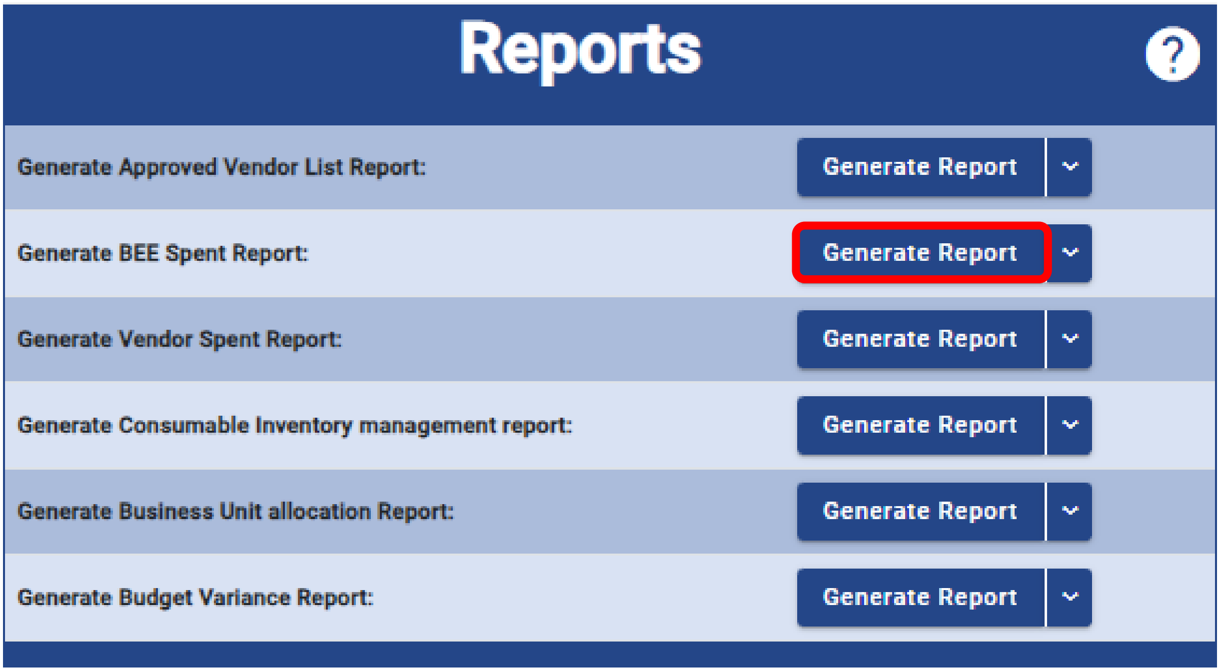


Figure 1 Generate BEE Spend

**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:**

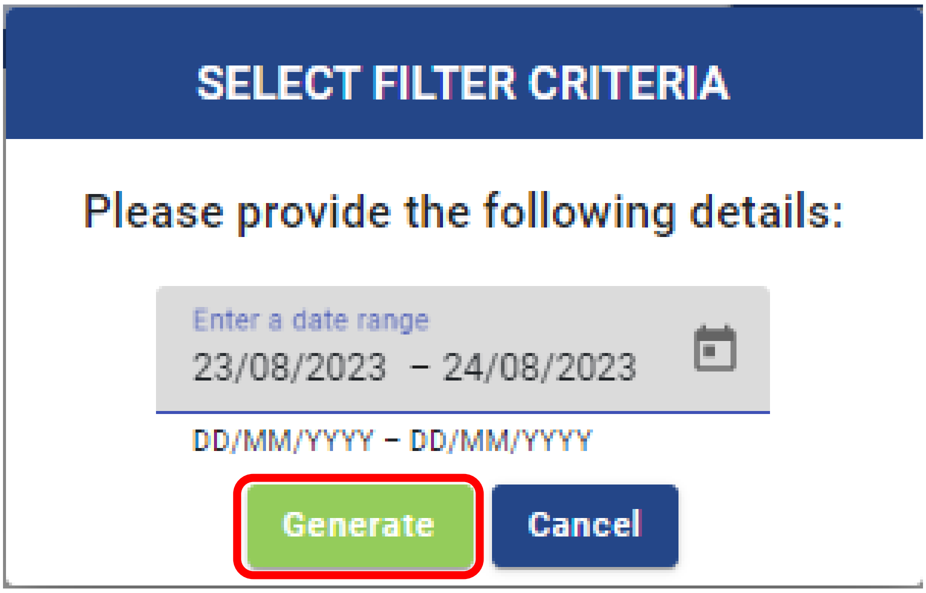


Figure 1 BEE Spend Screen

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:**

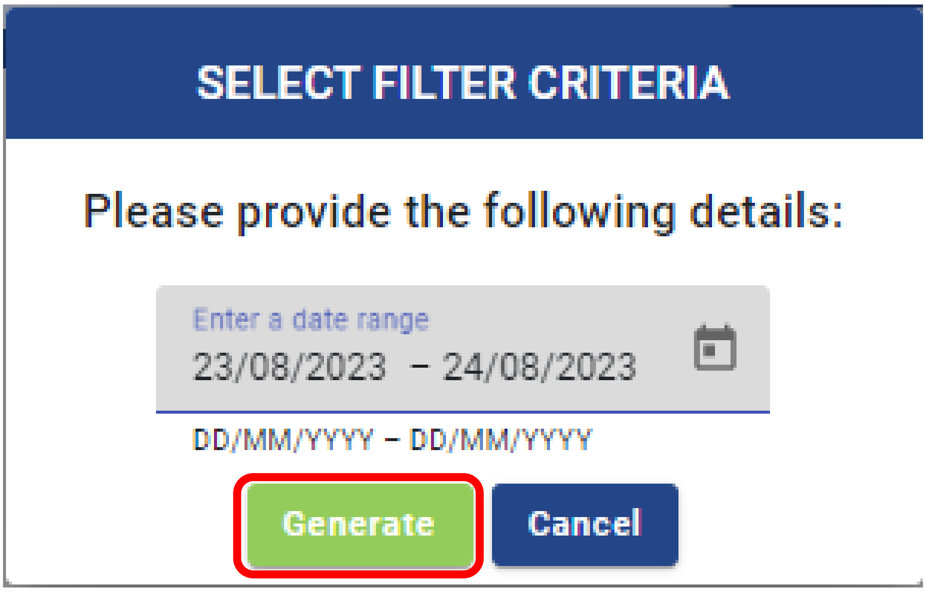


Figure 1 Generate BEE Spend Screen

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.**

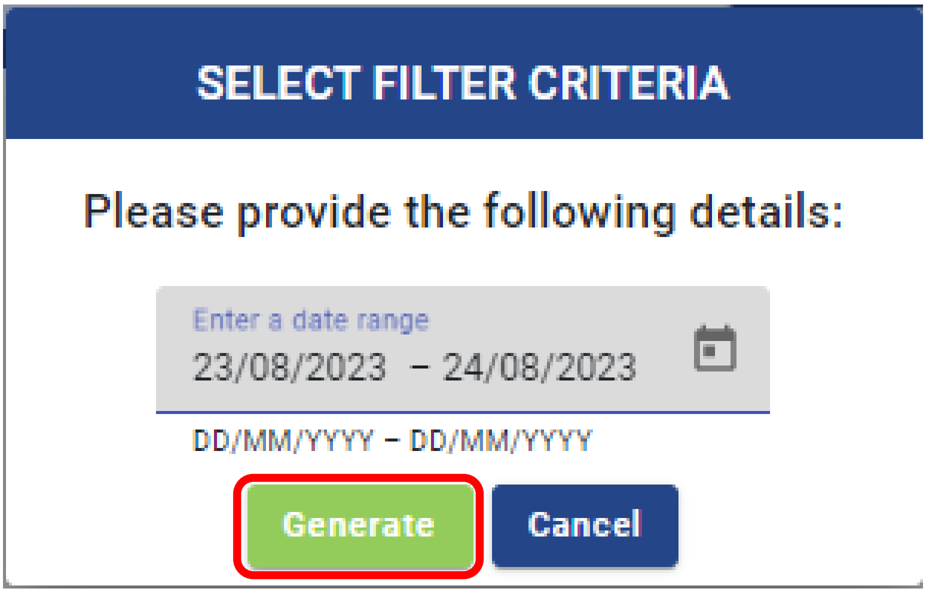


Figure 1 Download BEE Spend Screen

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:**

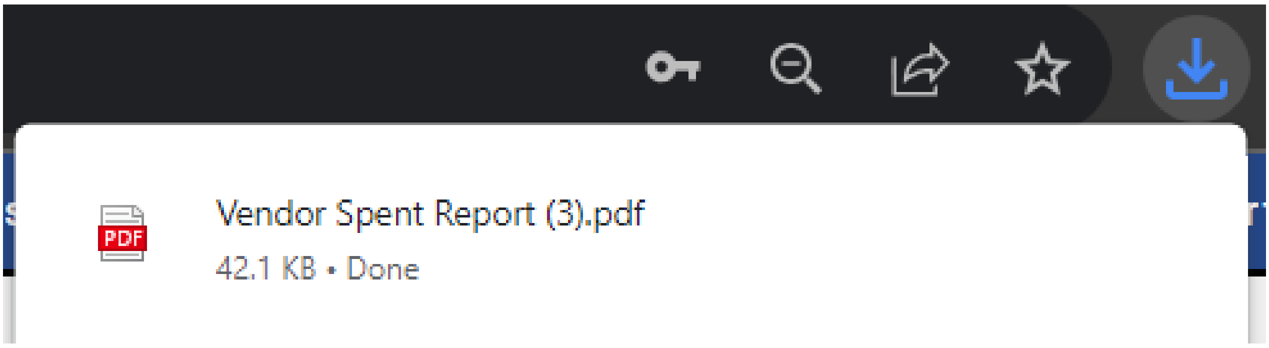


Figure 1 Downloaded Bee Spend Report

## Step 4 Generate Vendor Spend report:

**Then Click on the "Generate" button on the Generate Vendor Spend row:**

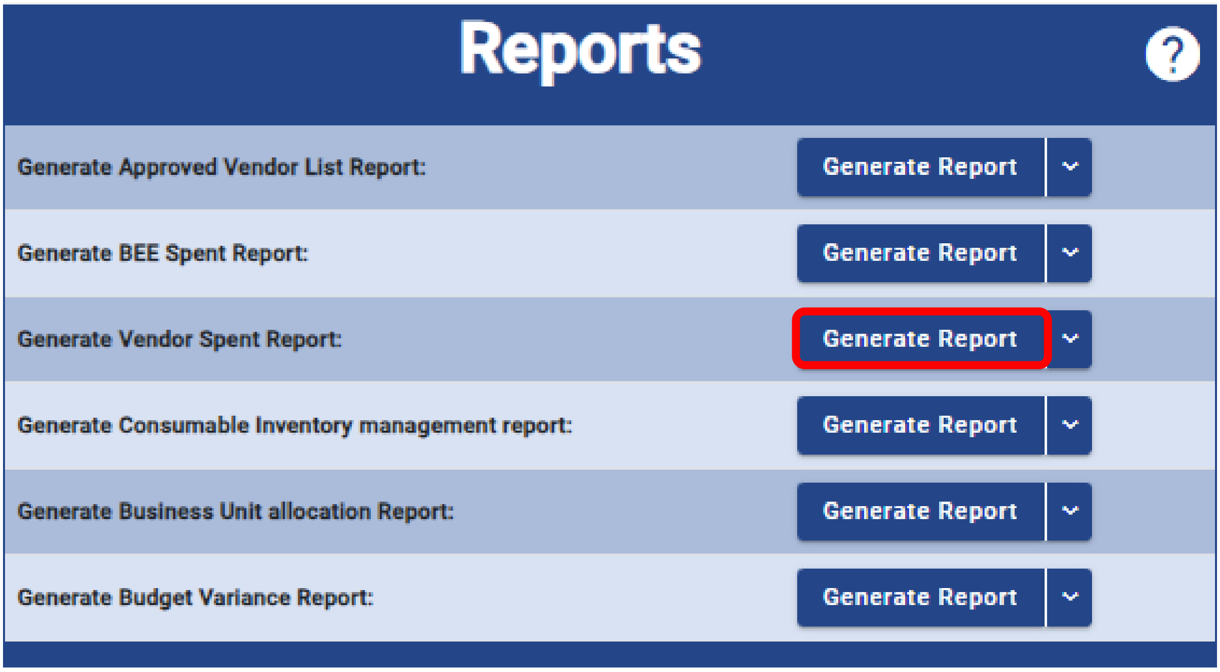


Figure 1 Generate Consumable Inventory management

**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:**

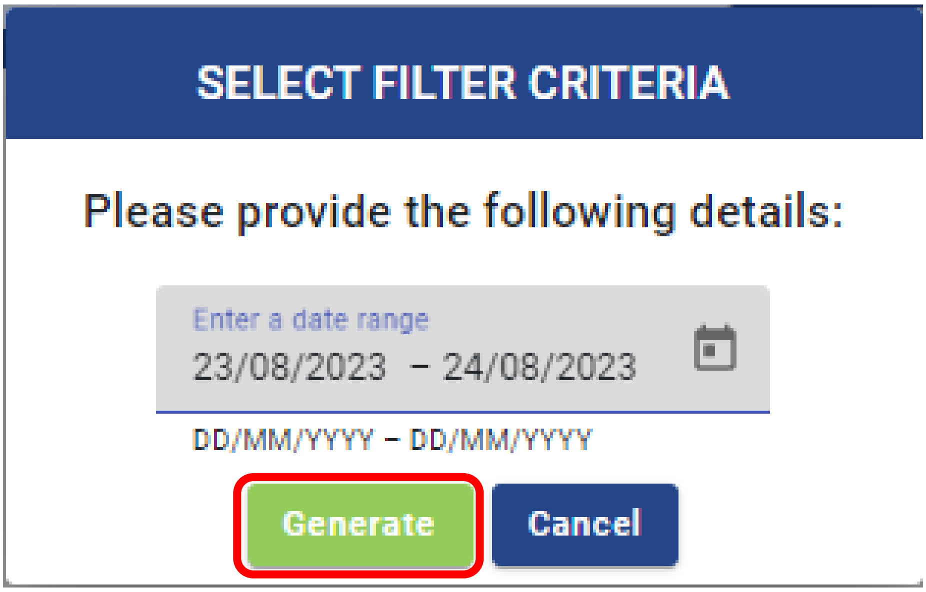


Figure 1 Vendor Spend Screen

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:**

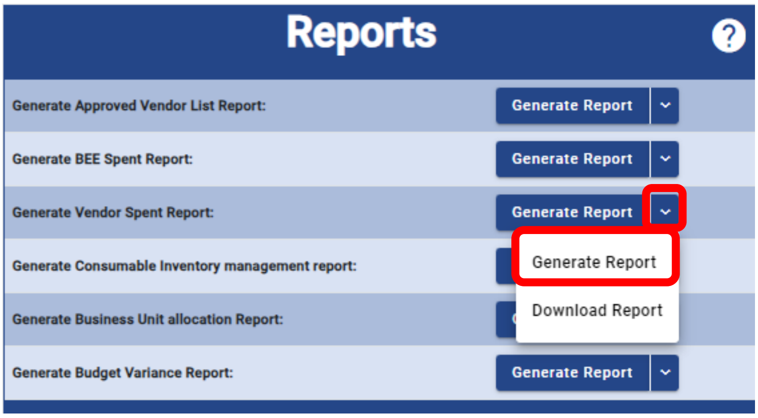


Figure 1 Alt Generate Vendor Spend

**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:**

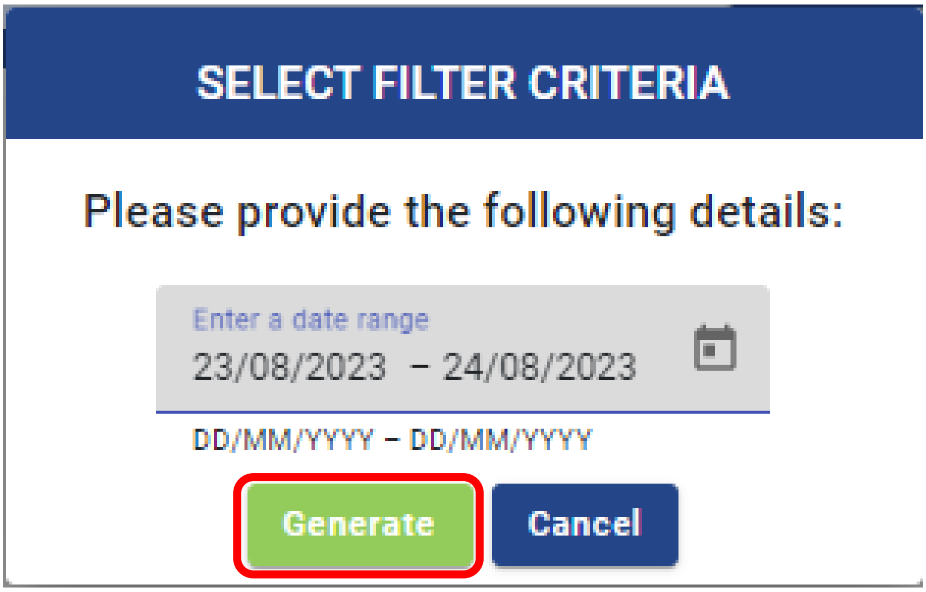


Figure 1 Generate Vendor Spend Screen

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.**

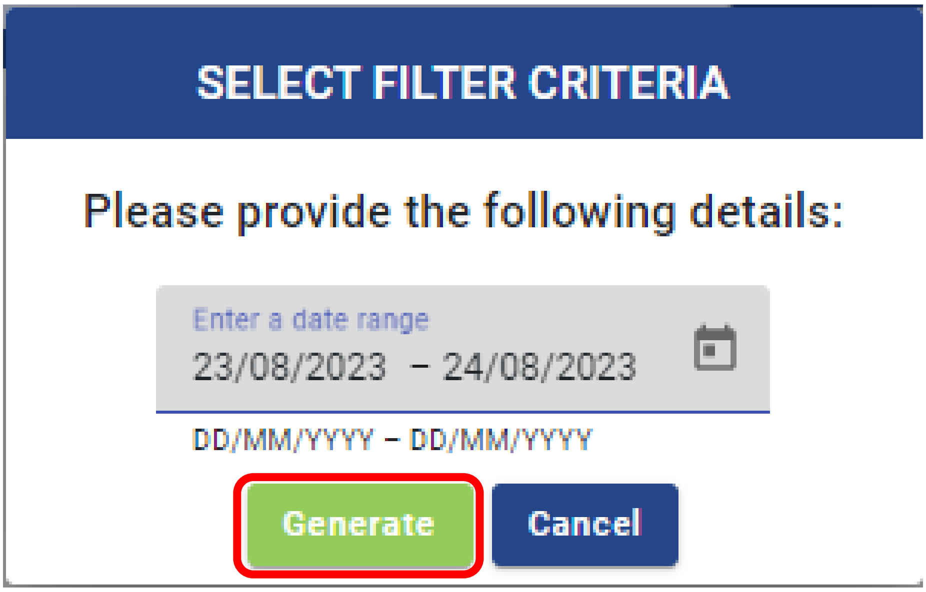


Figure 1 Download Vendor Spend Screen

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:**

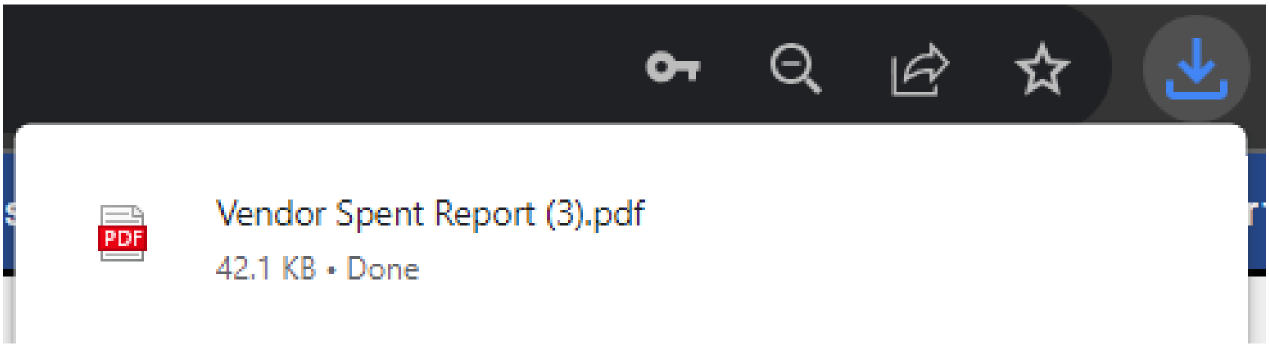


Figure 1 Downloaded Vendor Spend Report

## 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:**

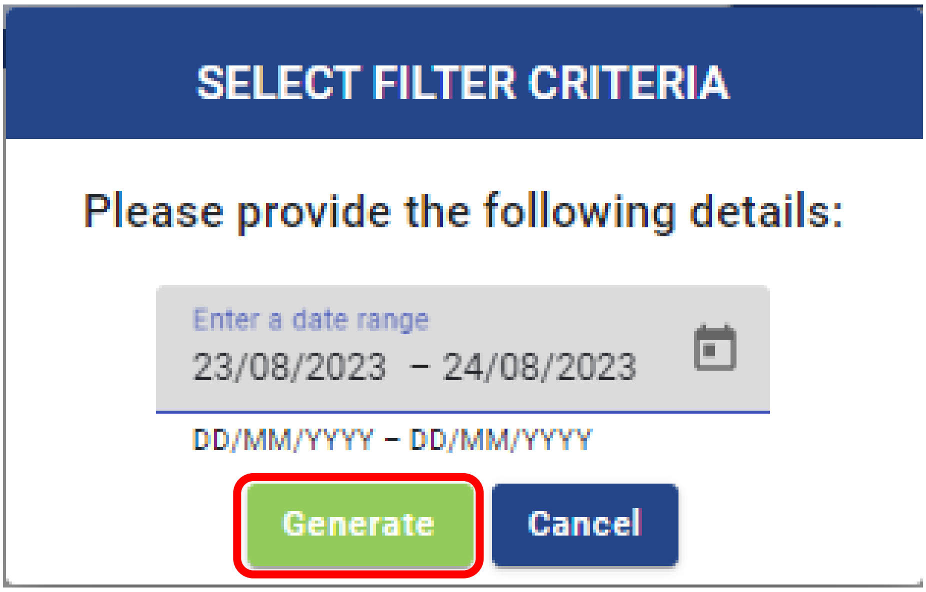


Figure 1 Consumable Inventory Management Screen

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:**

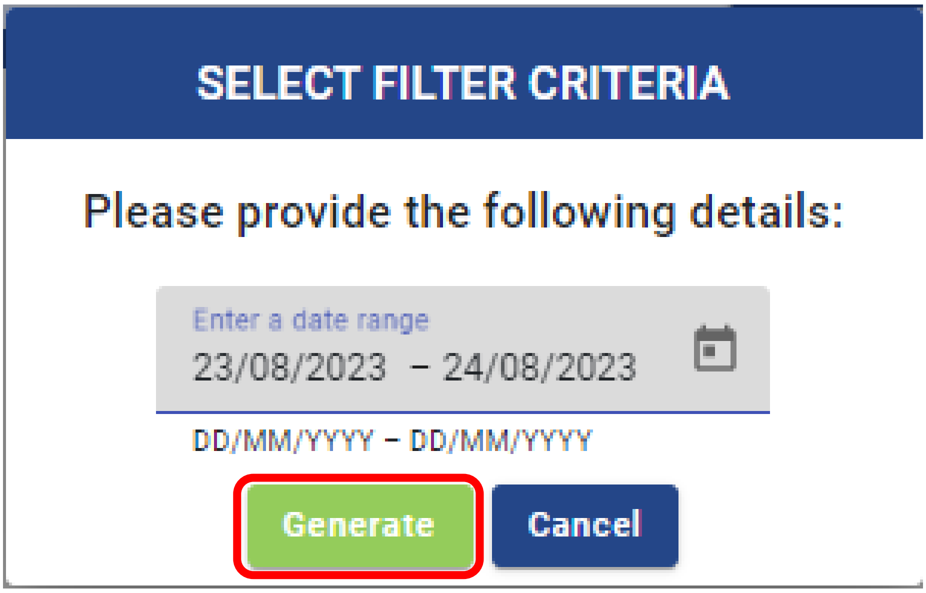


Figure 1 Generate Consumable Inventory Management Screen

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.**

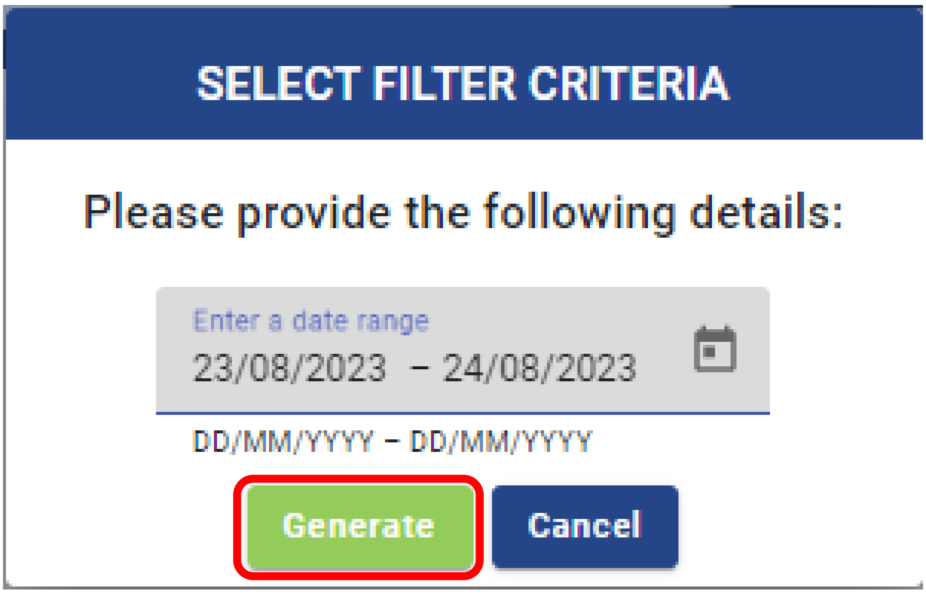


Figure 1 Download Consumable Inventory Management Screen

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:**

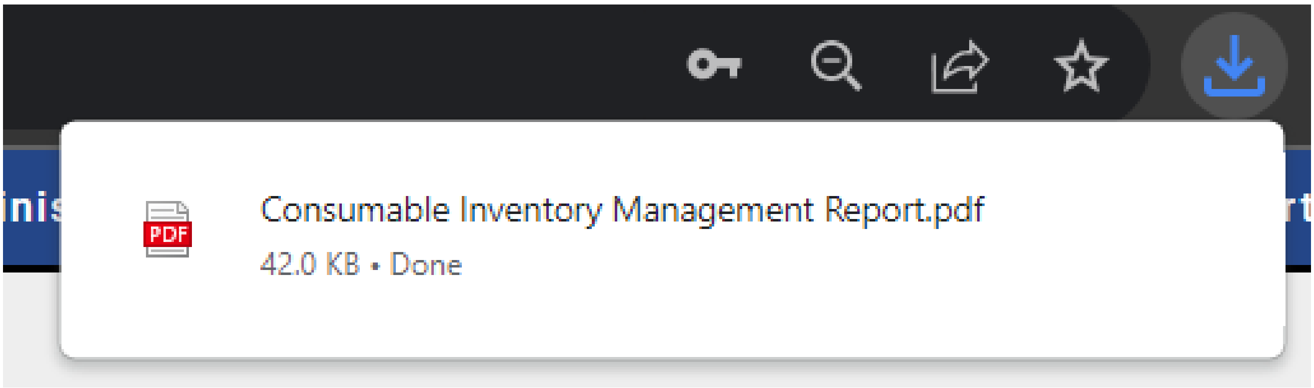


Figure 1 Downloaded Consumable Inventory Management Report

## Step 6 Generate Business Unit Allocation report:

**Then Click on the "Generate" button on the Generate Business Unit Allocation row:**

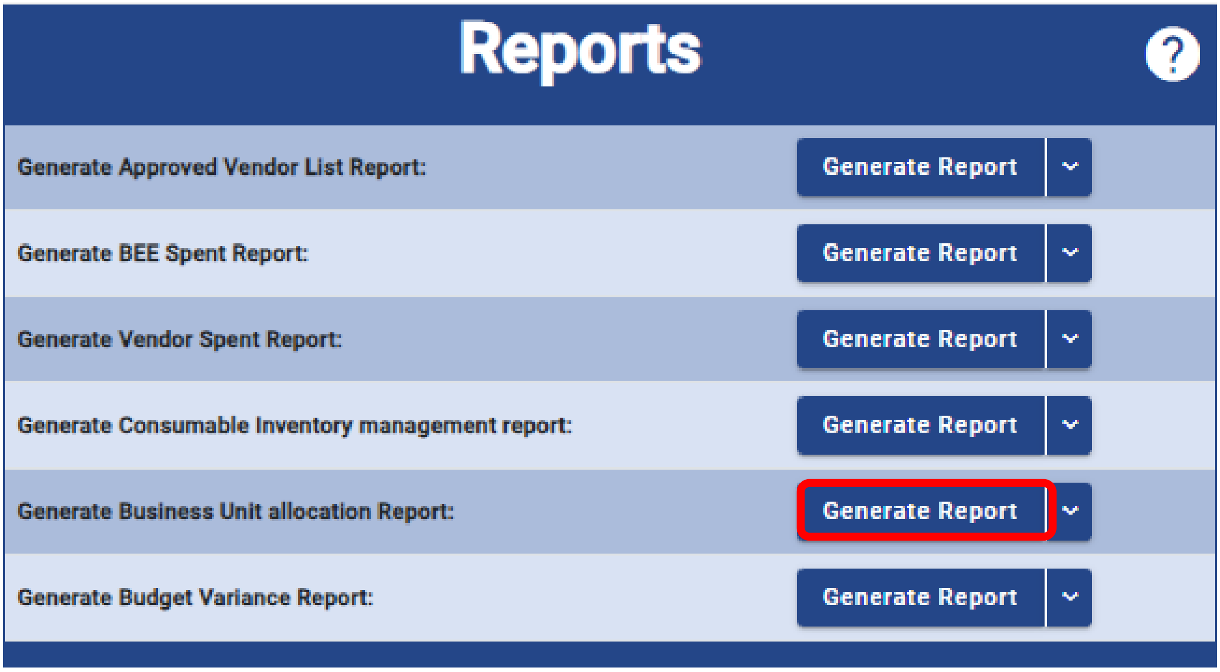


Figure 1 Generate Business Unit Allocation

**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:**

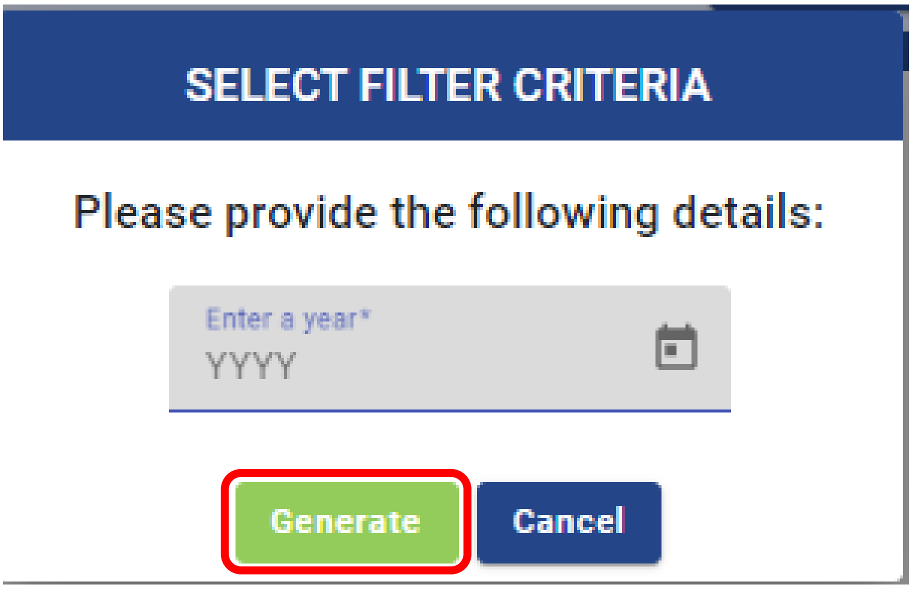


Figure 1 Business Unit Allocation Screen

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:**

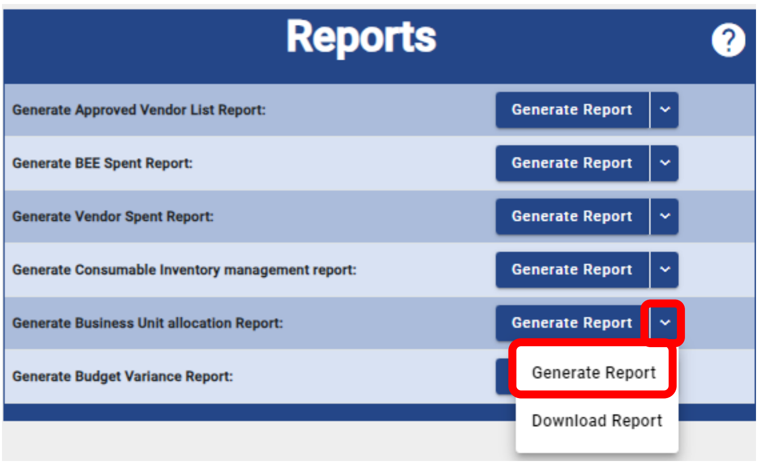


Figure 1 Alt Generate Business Unit Allocation

**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:**

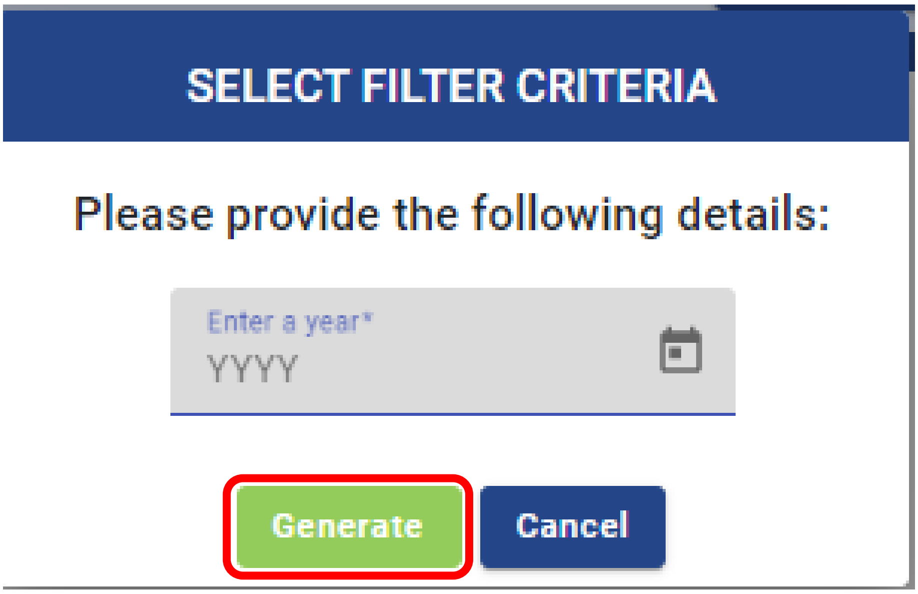


Figure 1 Generate Business Unit Allocation Screen

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.**

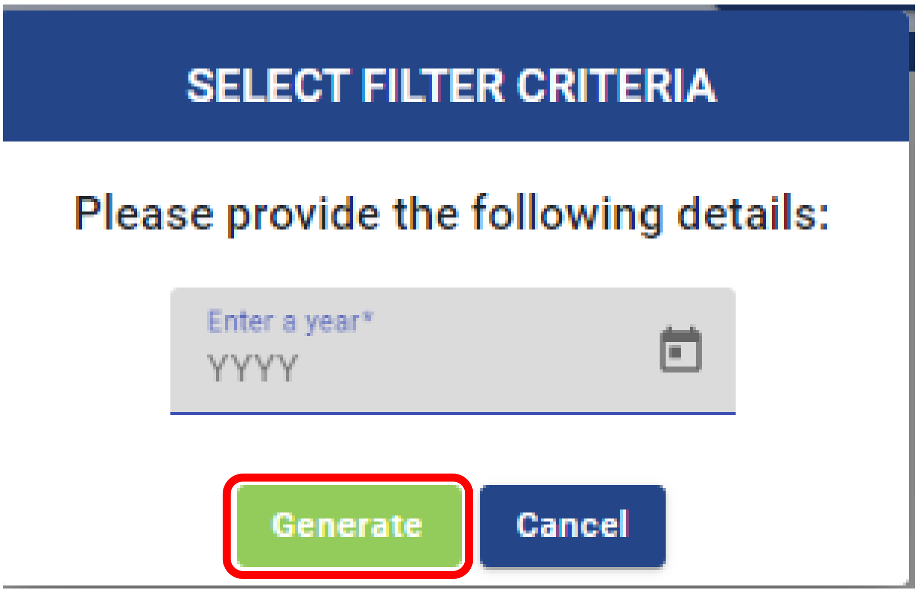


Figure 1 Download Business Unit Allocation Screen

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:**

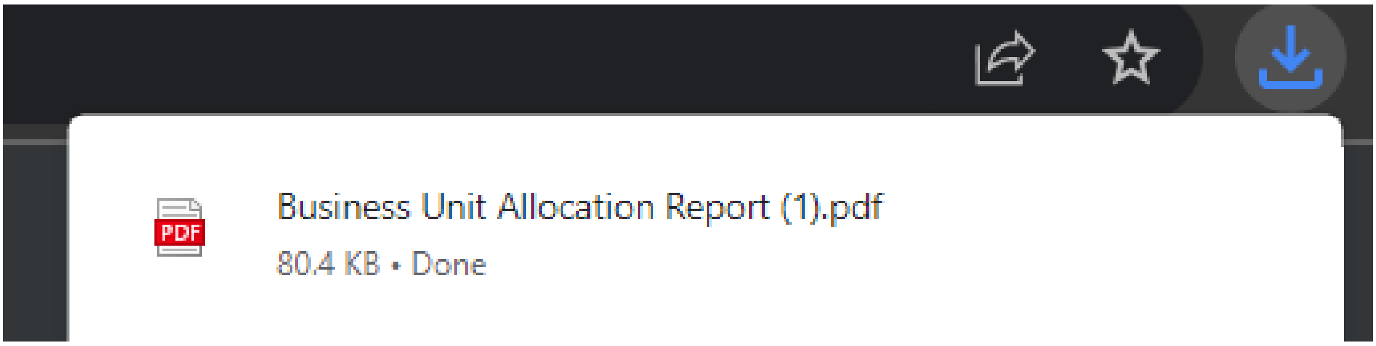


Figure 1 Downloaded Business Unit Allocation Report

## Step 7 Generate Budget Variance report:

**Then Click on the "Generate" button on the Generate Budget Variance row:**

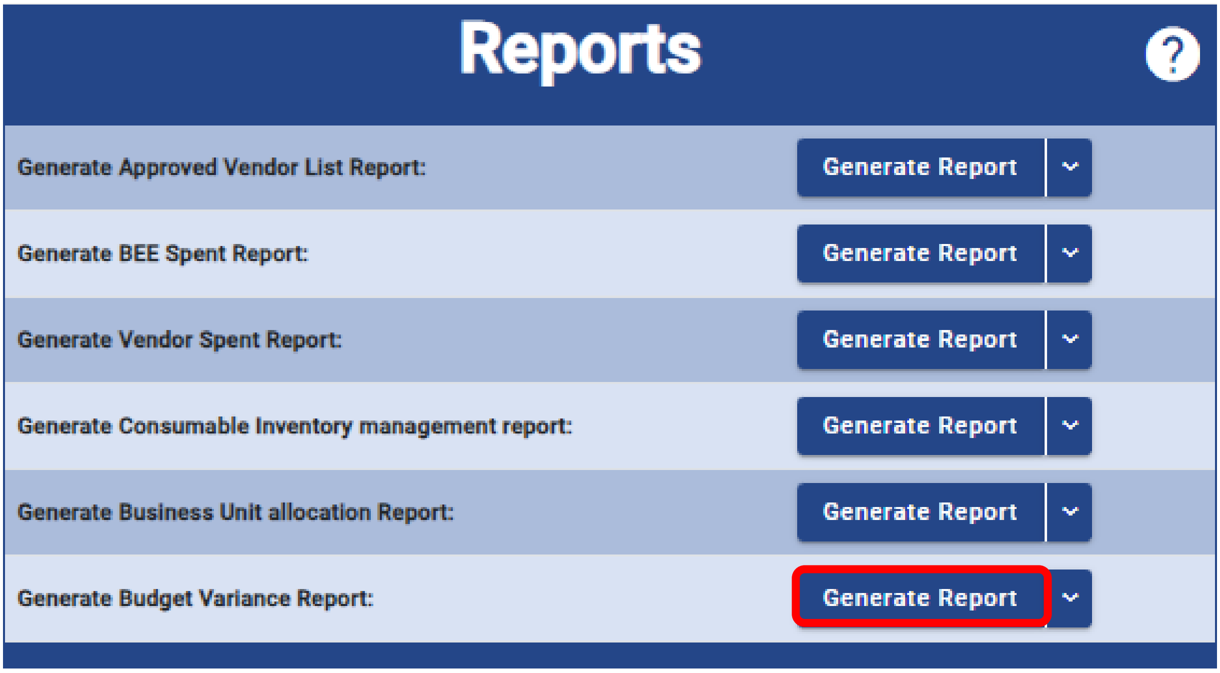


Figure 1 Generate Budget Variance

**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:**

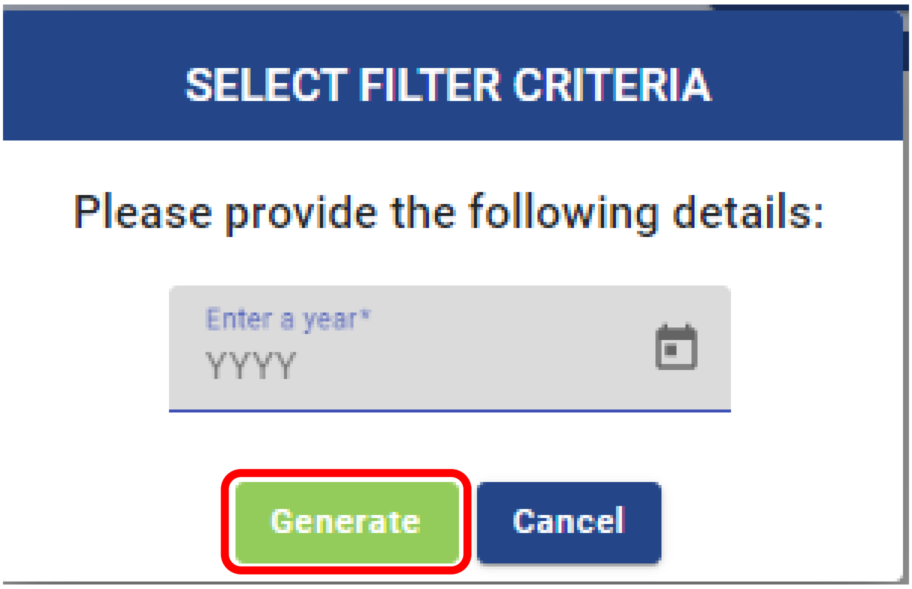


Figure 1 Budget Variance Screen

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

**You could also alternatively click on the "V" then click on the "Generate Report" Button:**

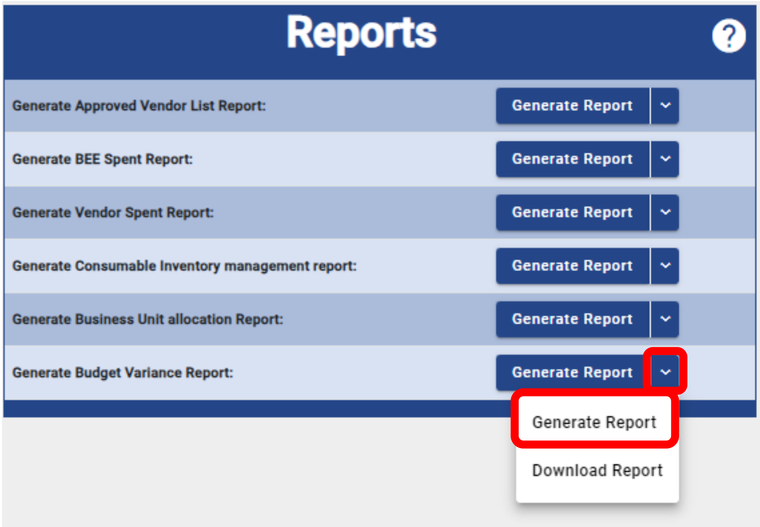


Figure 1 Alt Generate Budget Variance

**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:**

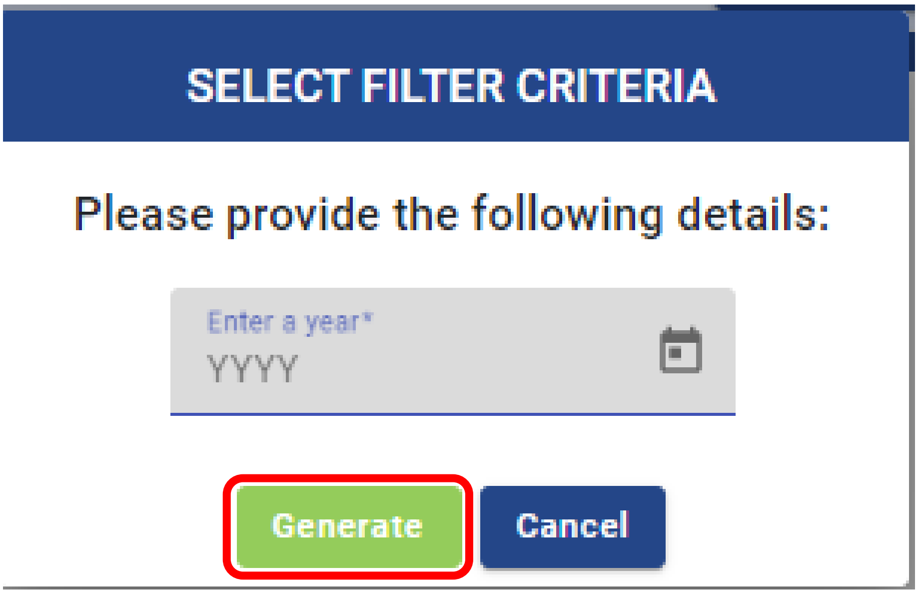


Figure 1 Generate Budget Variance Screen

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:**

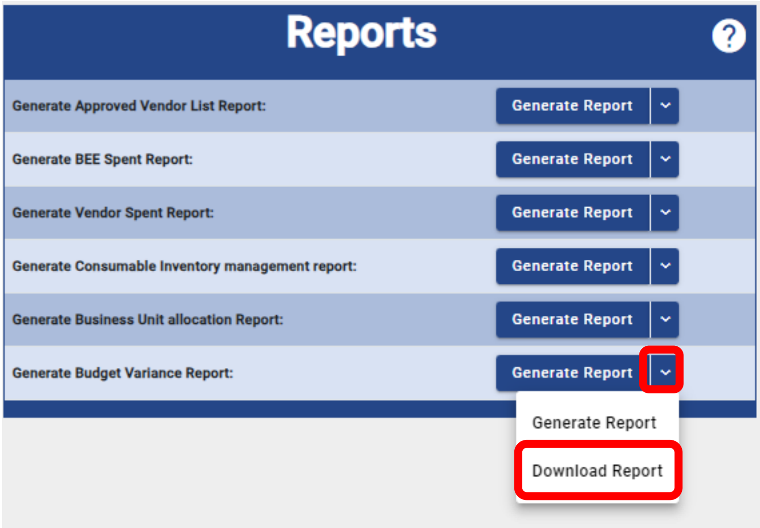


Figure 1 Download Budget Variance

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

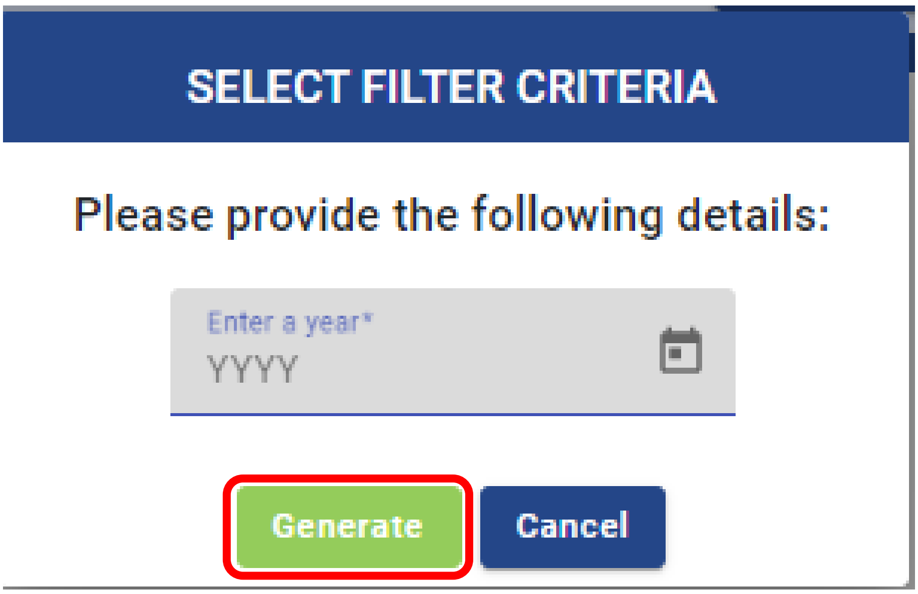


Figure 1 Download Budget Variance Screen

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:**

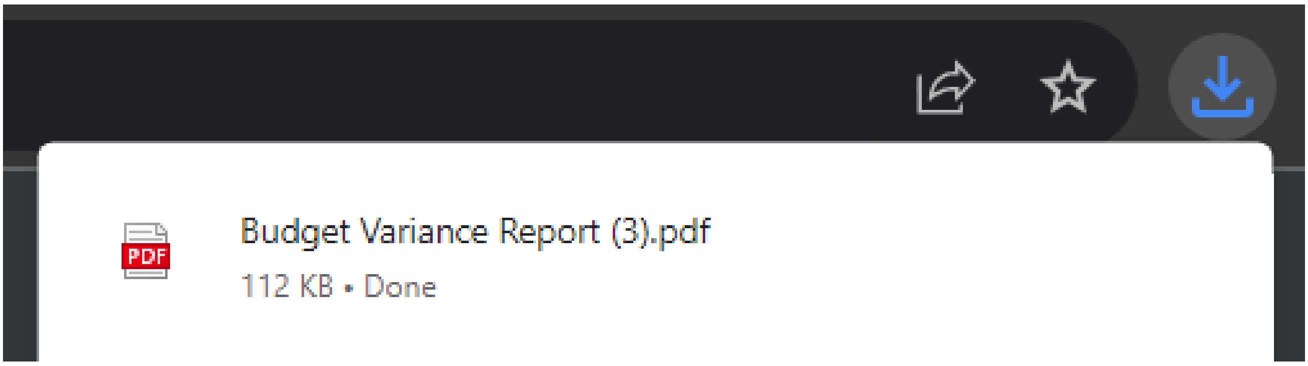


Figure 1 Downloaded Budget Variance Report

# 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.**

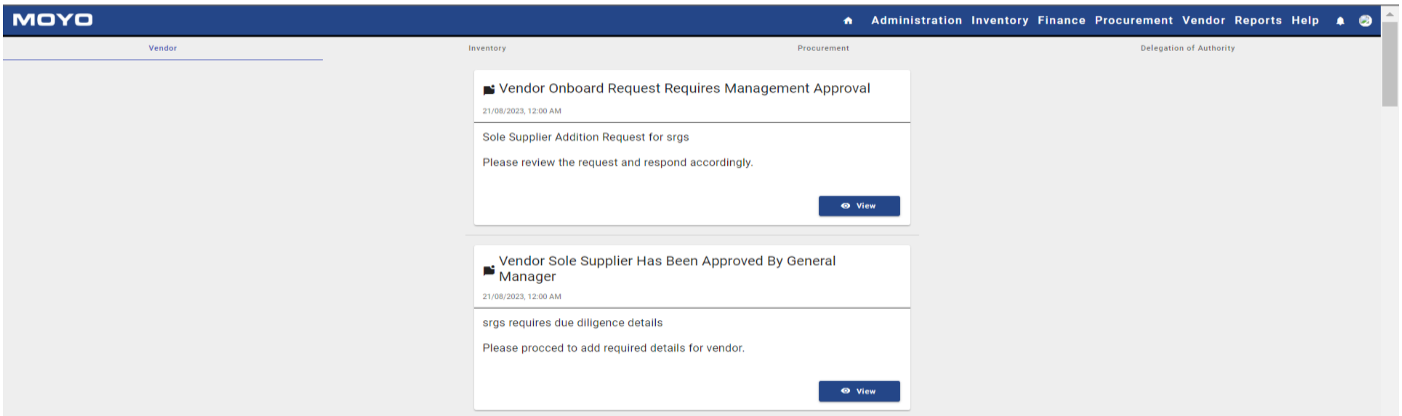


Figure 1 Notification Screen

## 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.**

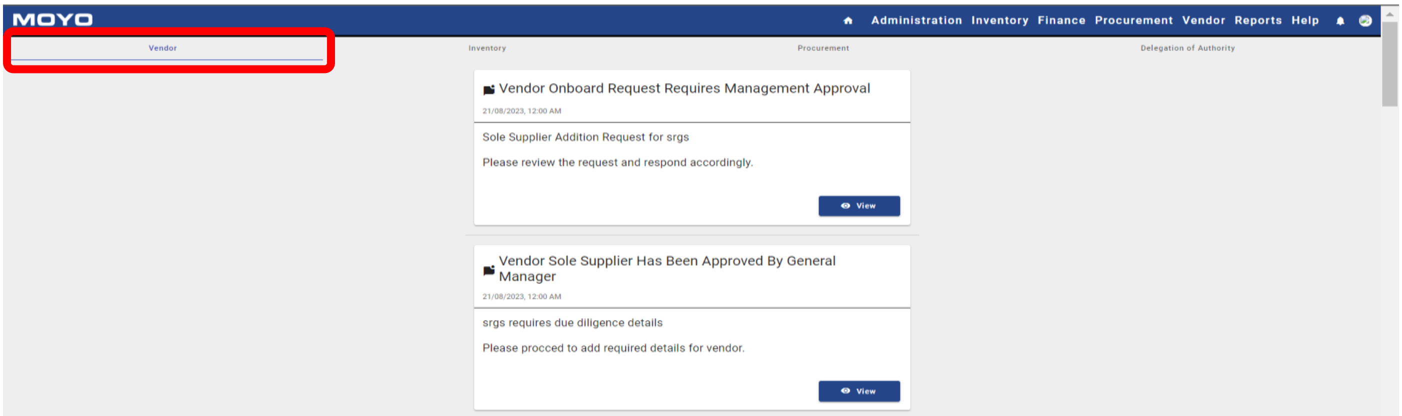


Figure 1 Vendor tab view

**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.**

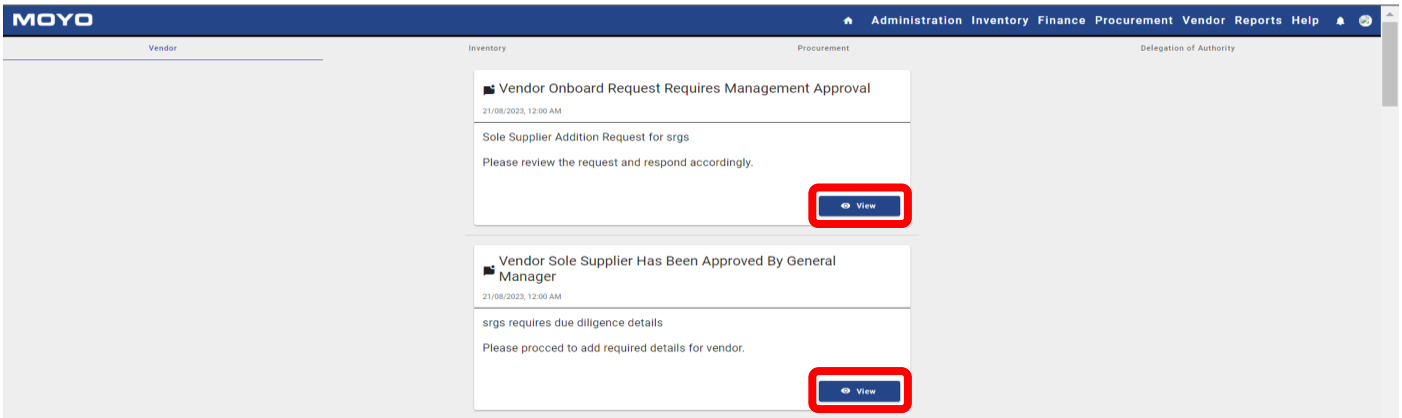


Figure 1 Click View Vendor Notification

## 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.**

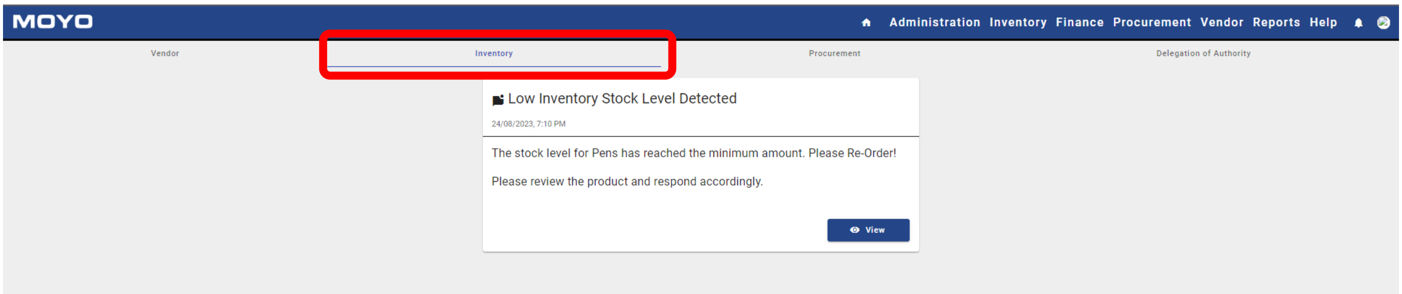


Figure 1 Inventory tab view

**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.**

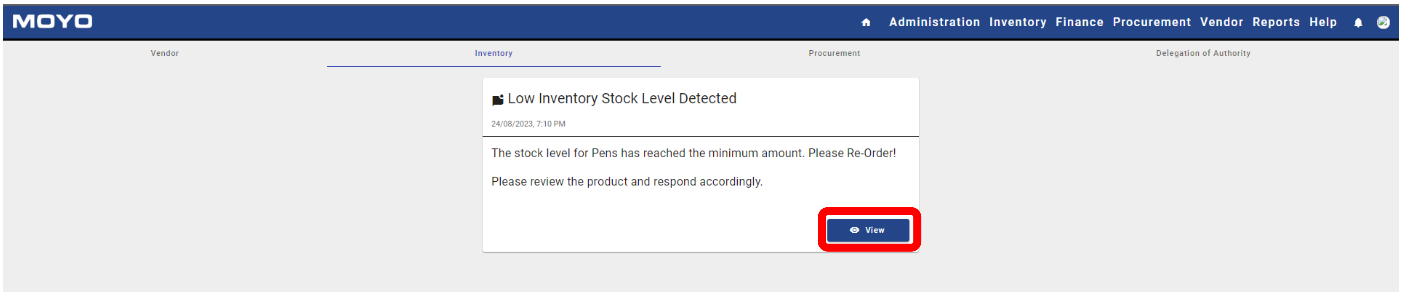


Figure 1 Click View Inventory Notification

## 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.**

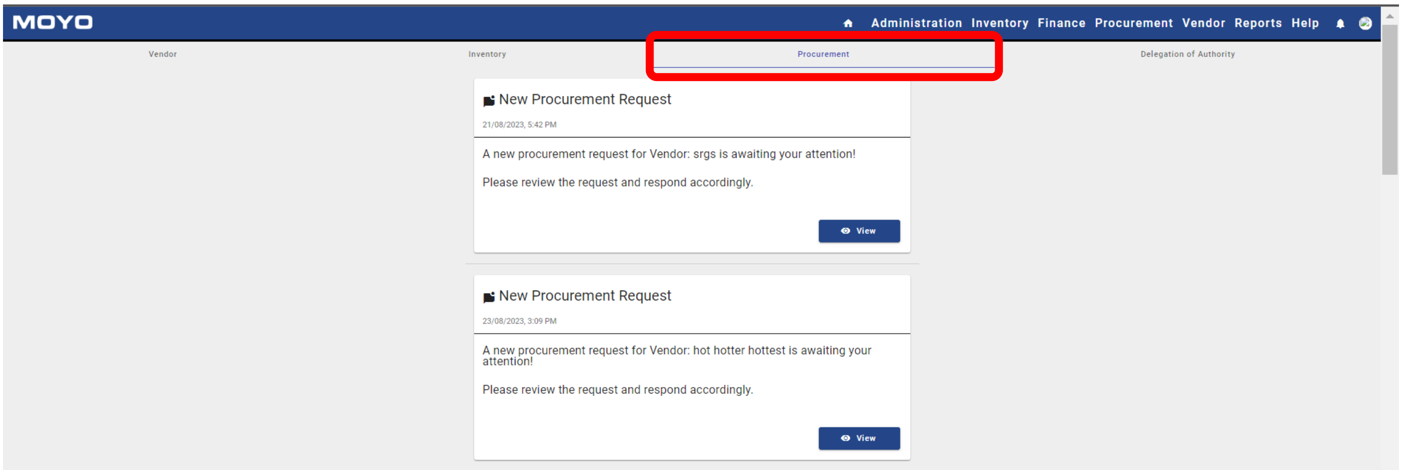


Figure 1 Procurement tab view

**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.**

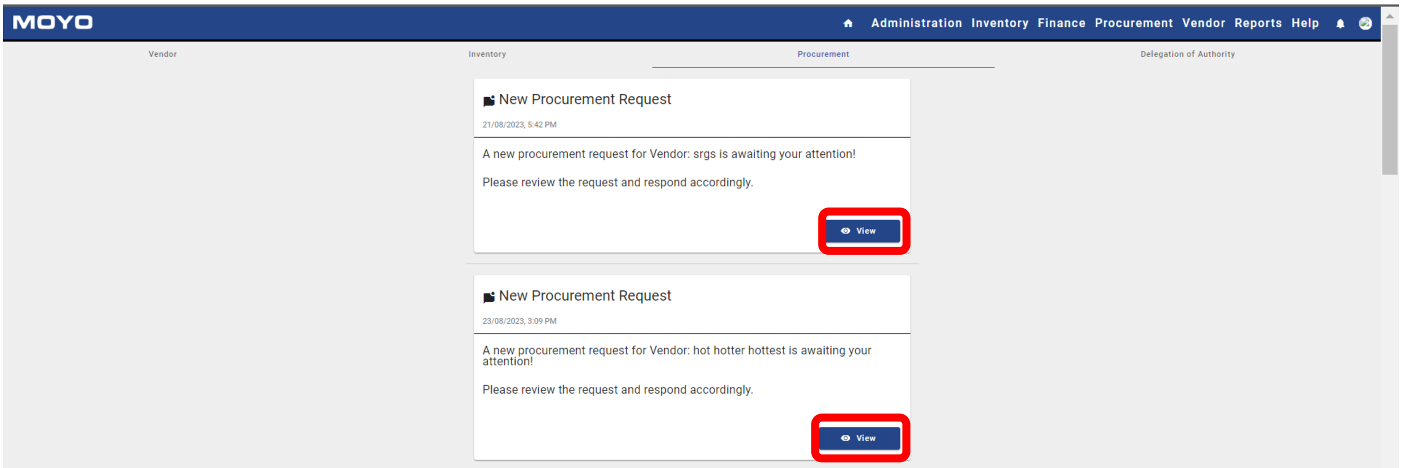


Figure 1 Click View Procurement Notification

## 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.**

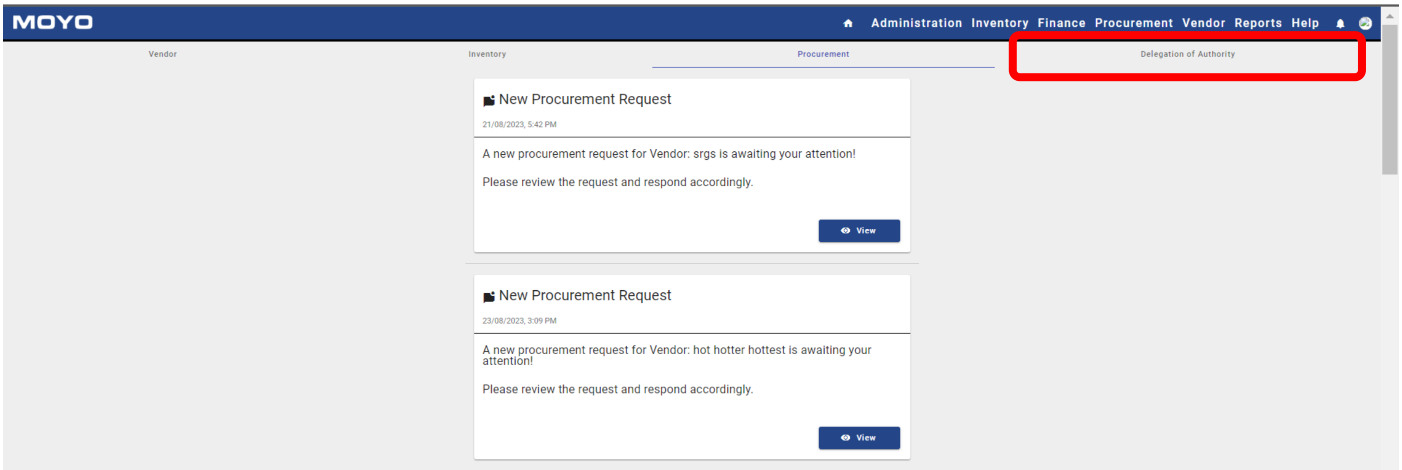


Figure 1 Delegation of Authority tab view

**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.**

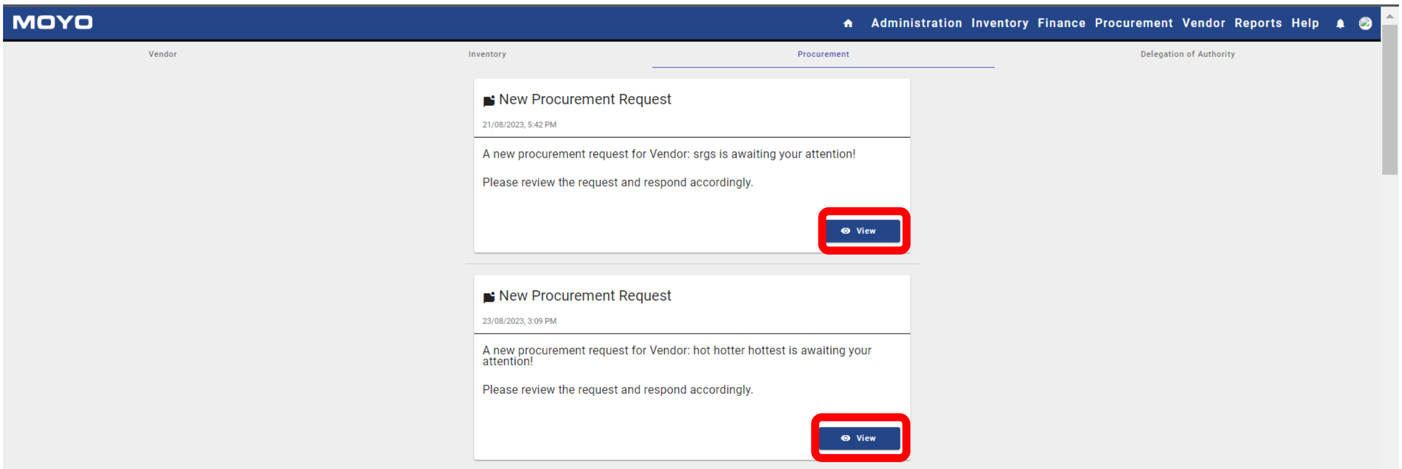


Figure 1 Click View Delegation of Authority Notification

# 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:**

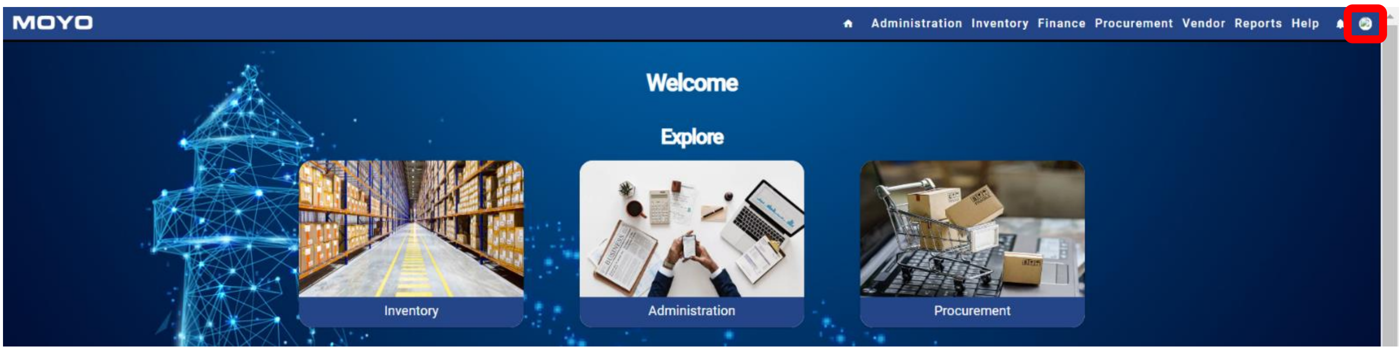


Figure 1 Home Screen to Account Screen

### Step 2 Navigate to Profile screen:

**The system will display a dropdown menu. Then Click on the "Profile" button.**

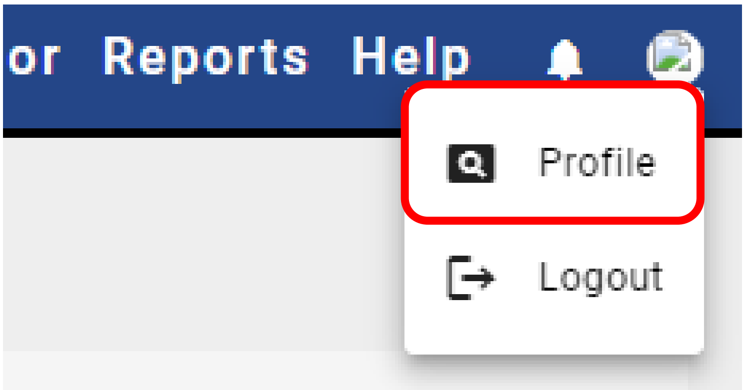


Figure 1 Account dropdown Click Profile Screen

**This will navigate you to the Profile screen.**

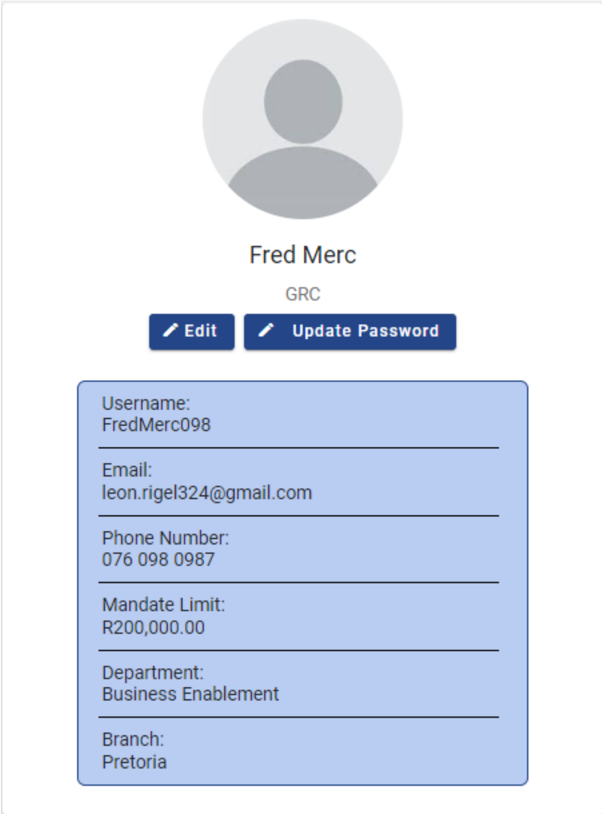


Figure 1 Edit profile Screen

## Step 3 Edit Profile:

**Then Click on the "Edit" button on the Profile screen.**

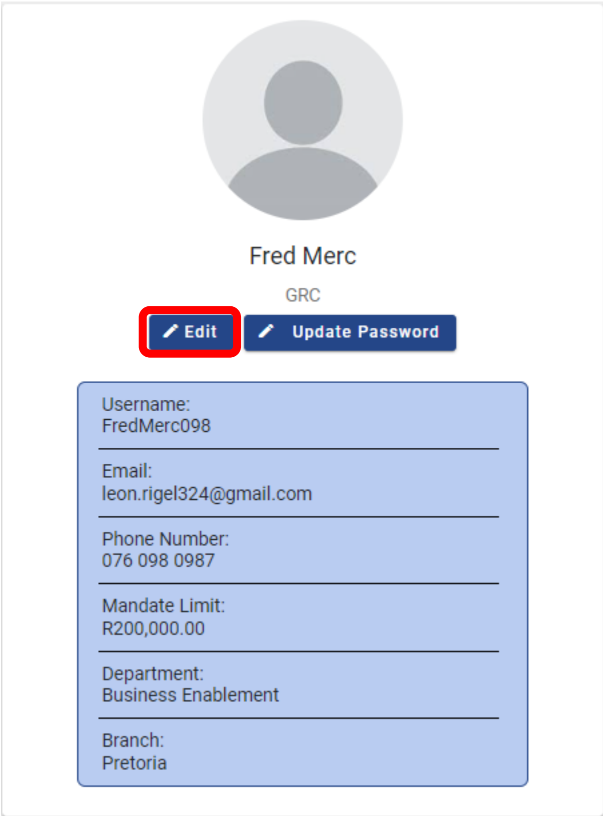


Figure 1 Edit profile Click Edit

**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)**

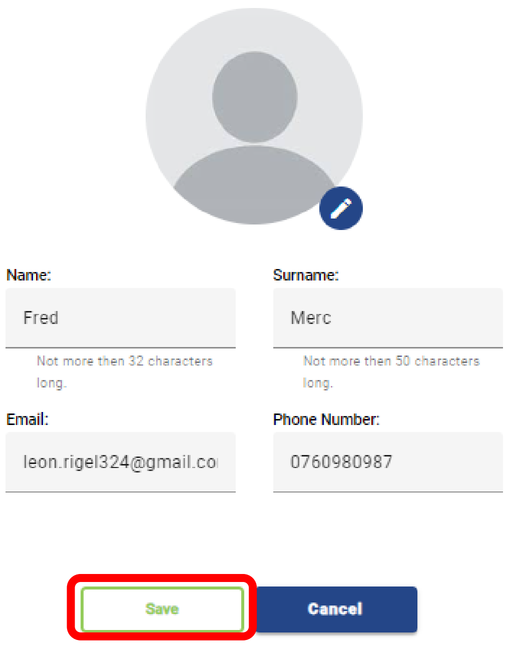

Figure 1 Click Save Edit Profile

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)

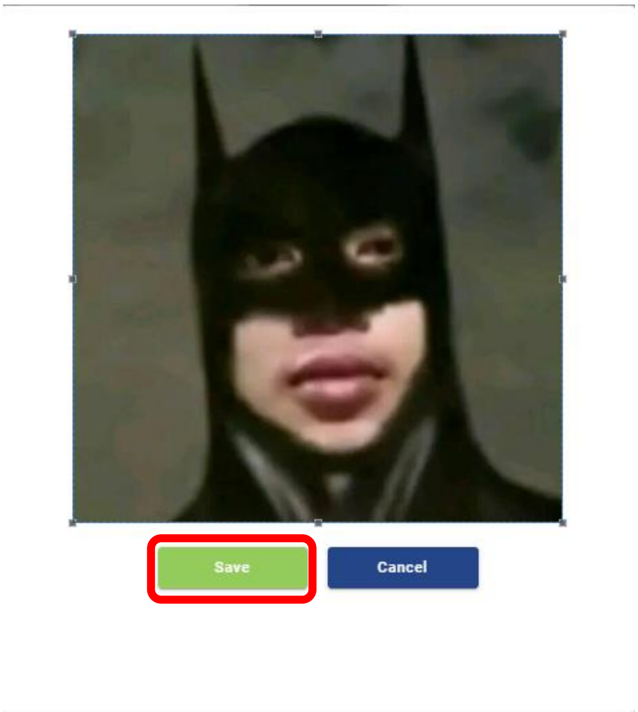


Figure 1 Click Save Profile Picture screen.

## Step 4 Update Password:

**Then Click on the "Update Password" button on the Profile screen.**

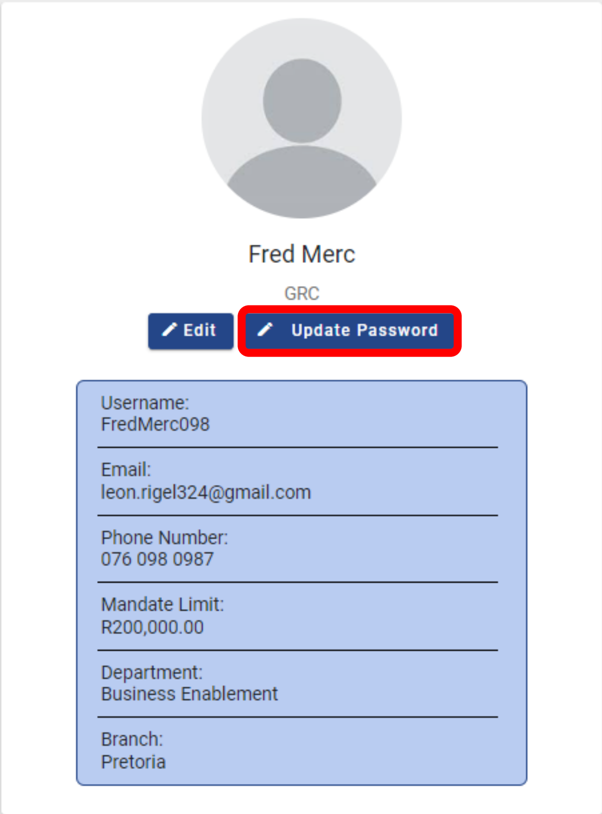


Figure 1 Click Update Password Edit profile Screen

**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)**

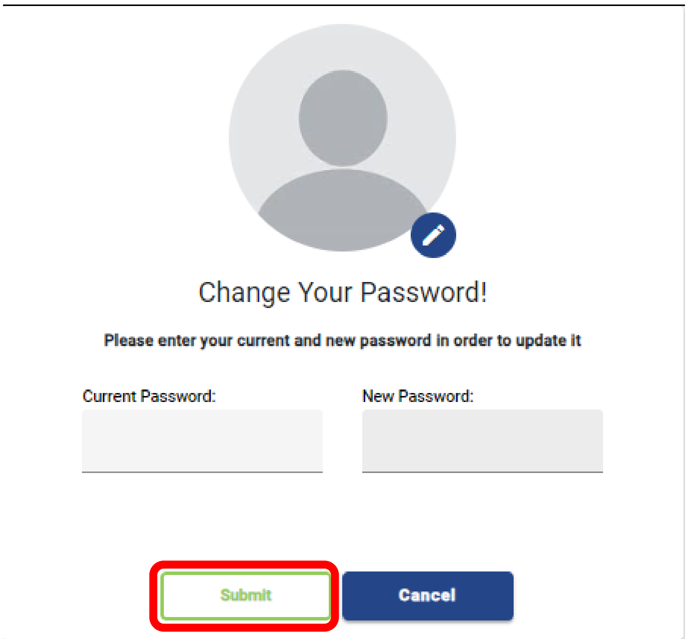


Figure 1 Click Submit Update Password

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.**

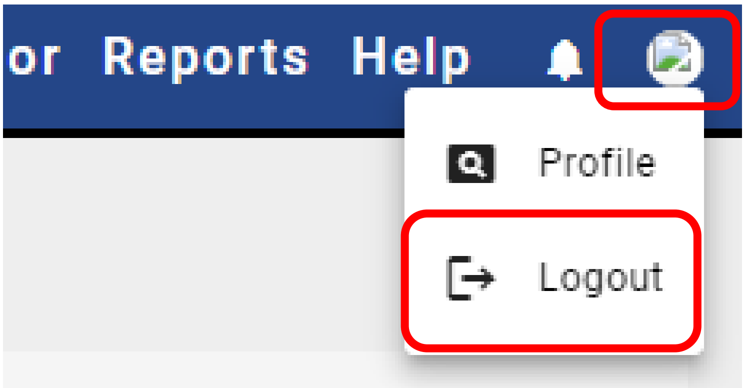


Figure 1 Click Logout Button

## Step 6 Login:

**On the login Screen Click the "login" button. This will log you into the system.**

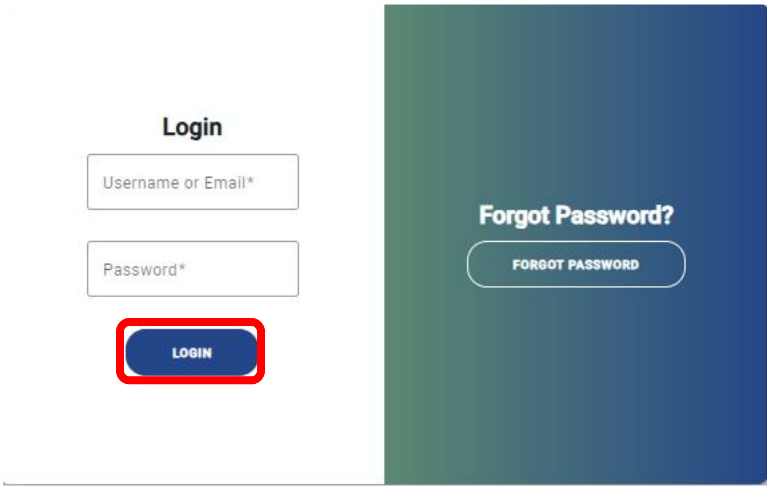


Figure 1 Click Login Button

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.**

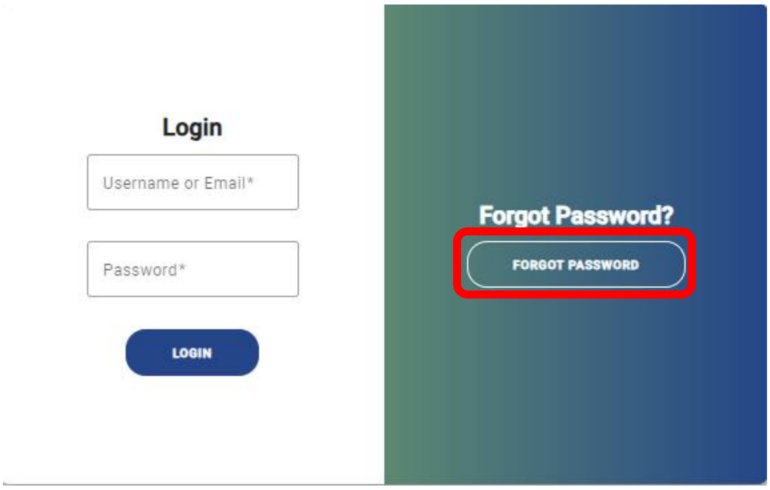


Figure 1 Click Forgot Password Button

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

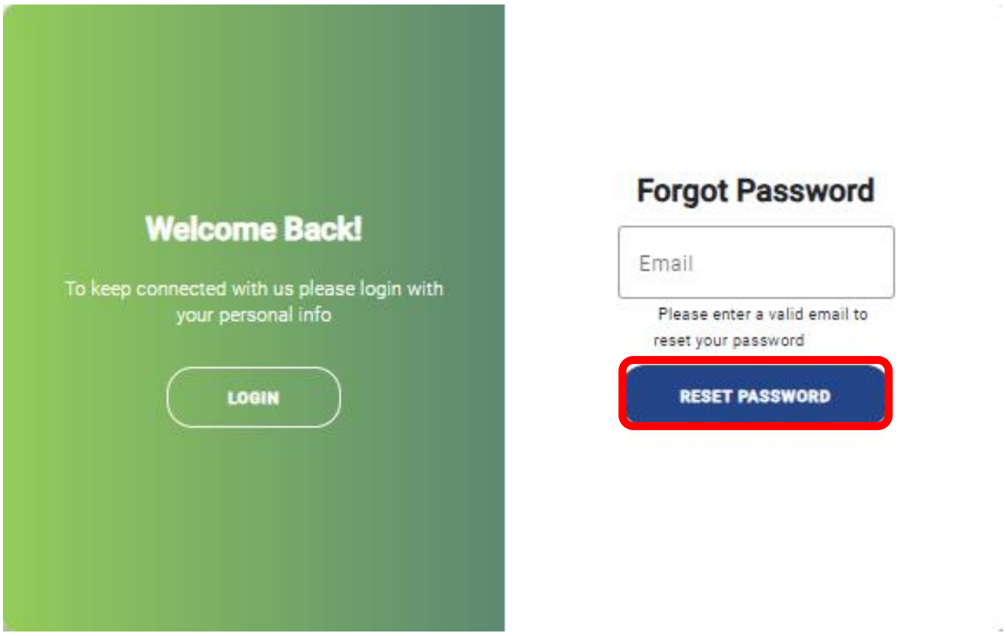


Figure 1 Click Reset Password Button

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