User Manual

PROCION SYSTEM ONLINE

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Vendor Section

Onboard Request:

Edit 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:
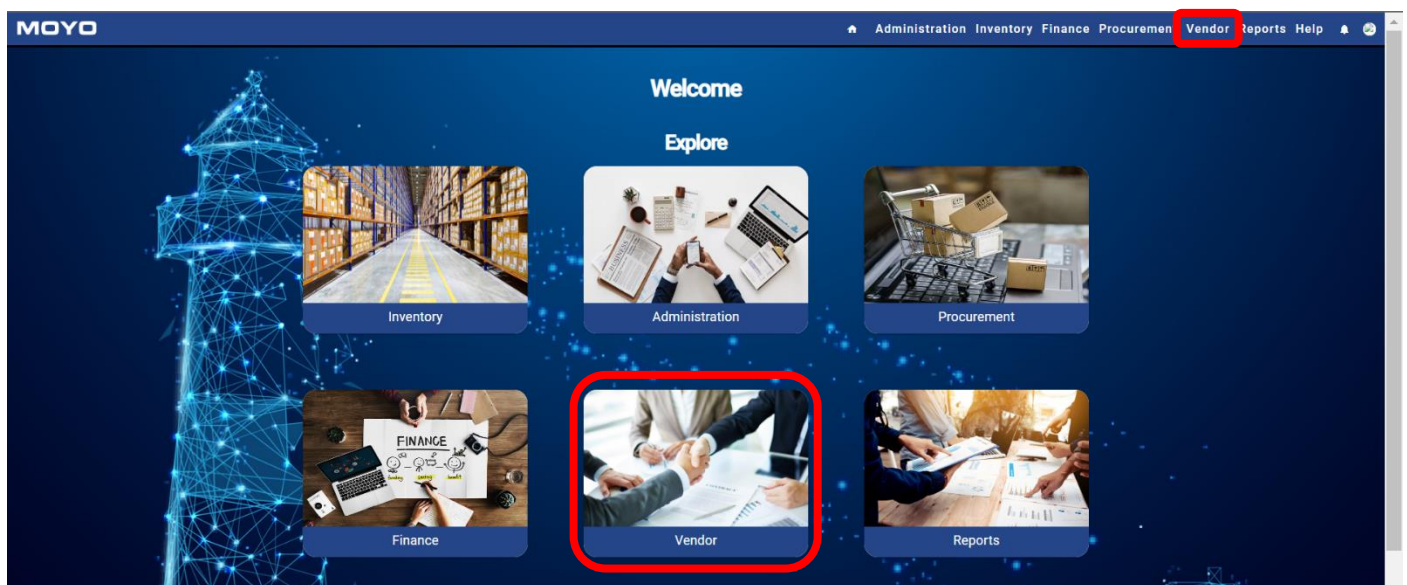

Figure 1 Home Screen to Onboard Request Screen

Then Click on the "Onboard Request" button on the Vendor side navbar:
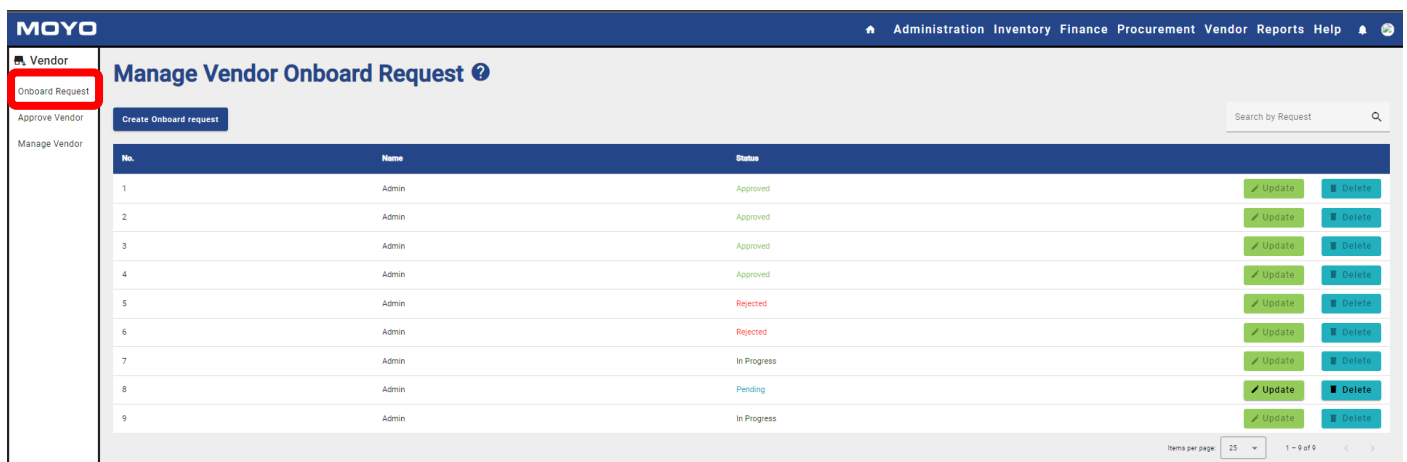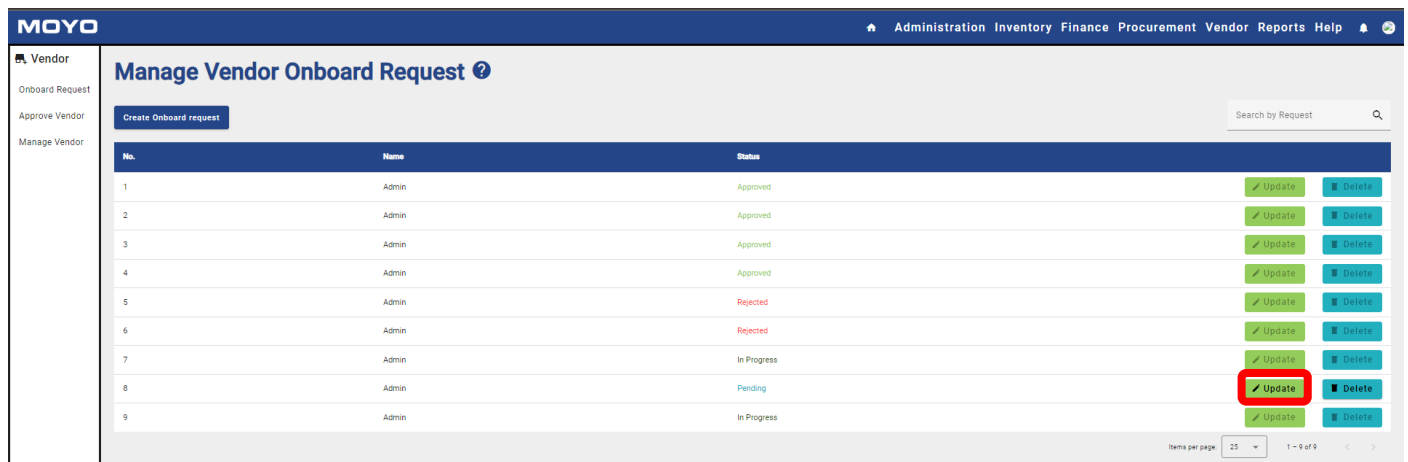

Figure 1 Vendor side nav to Onboard Request Screen

Step 2 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)

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.