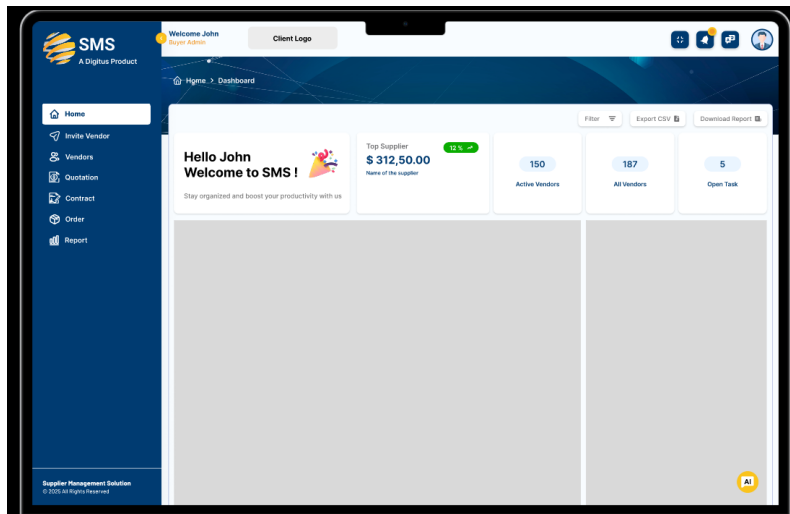


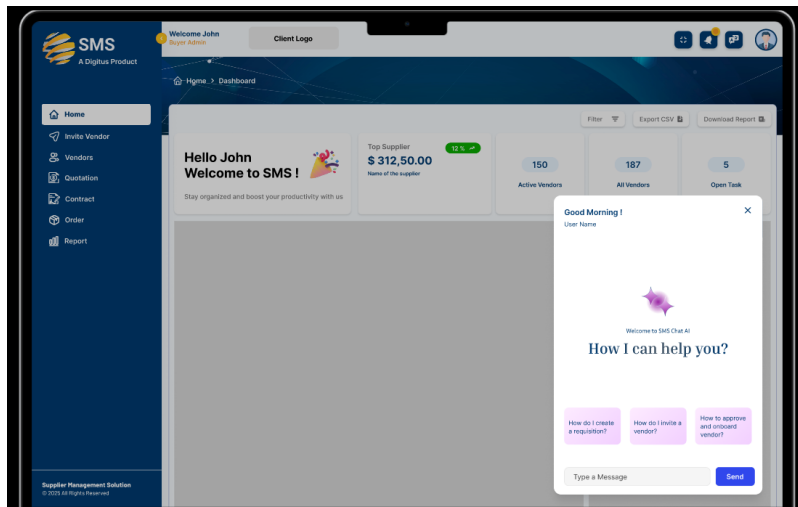
SMS User Guide

User Homepage



This is the homepage for the user where you can find the AI chat icon.

Click on it to start conversation with the SMS AI chat bot.

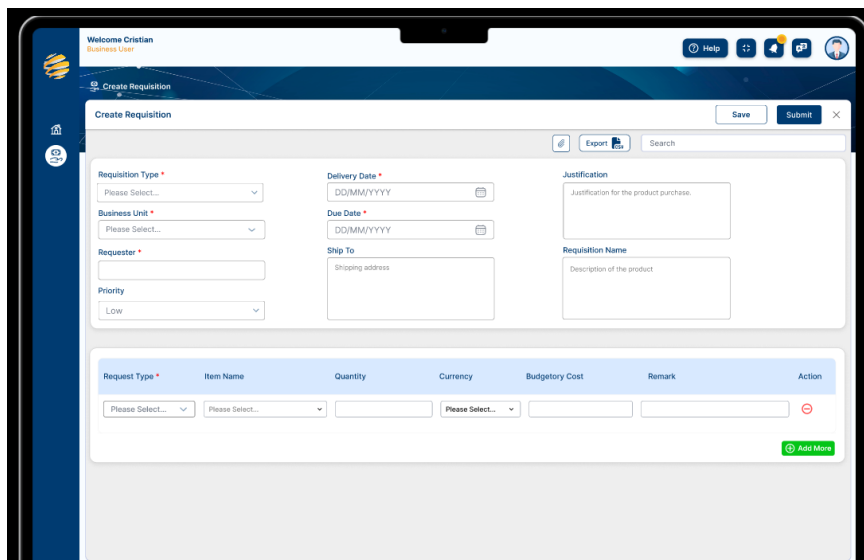


Here in this page, we have the chat window opened where we can enter whatever you want to ask to the AI bot.

How do I create a requisition?

To create a requisition, follow the steps below:

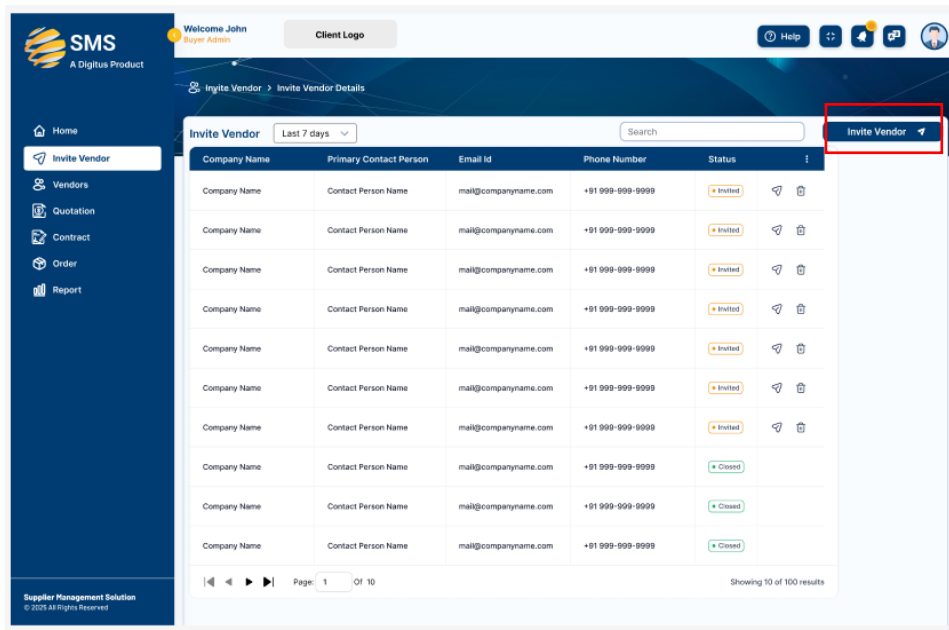
1. Click on the **“New Requisition”** toggle in the sidebar.
2. A window will appear where you can fill out the form with the necessary details.
 - **Requisition Type** (required): Select the type of requisition — *Service* or *Goods*.
 - **Business Unit**, **Requester**, **Delivery Date**, and **Due Date** are all required fields.
 - **Priority**: The default priority is set to *Low*, but you can change it by clicking on the priority field.
 - **Requester**: Enter your name in the *Requester* field.
 - **Delivery Date** and **Due Date**: Make sure both dates are entered accurately.
 - **Request Type**: Indicate whether the request is for a *Catalog* or *Non-Catalog* item:
 - For *Non-Catalog* items, enter the item name manually in the *Item Name* input field.
 - For *Catalog* items, select the item name from the dropdown list.
3. To manage items in the table:
 - Click **“Add More”** to add a new row.
 - Click the **Remove icon** to delete any added rows.
4. In the top-right corner, you'll see two buttons:
 - **Save**: Click this to save your changes as a draft.
 - **Submit**: Click this to submit the requisition and send the request.



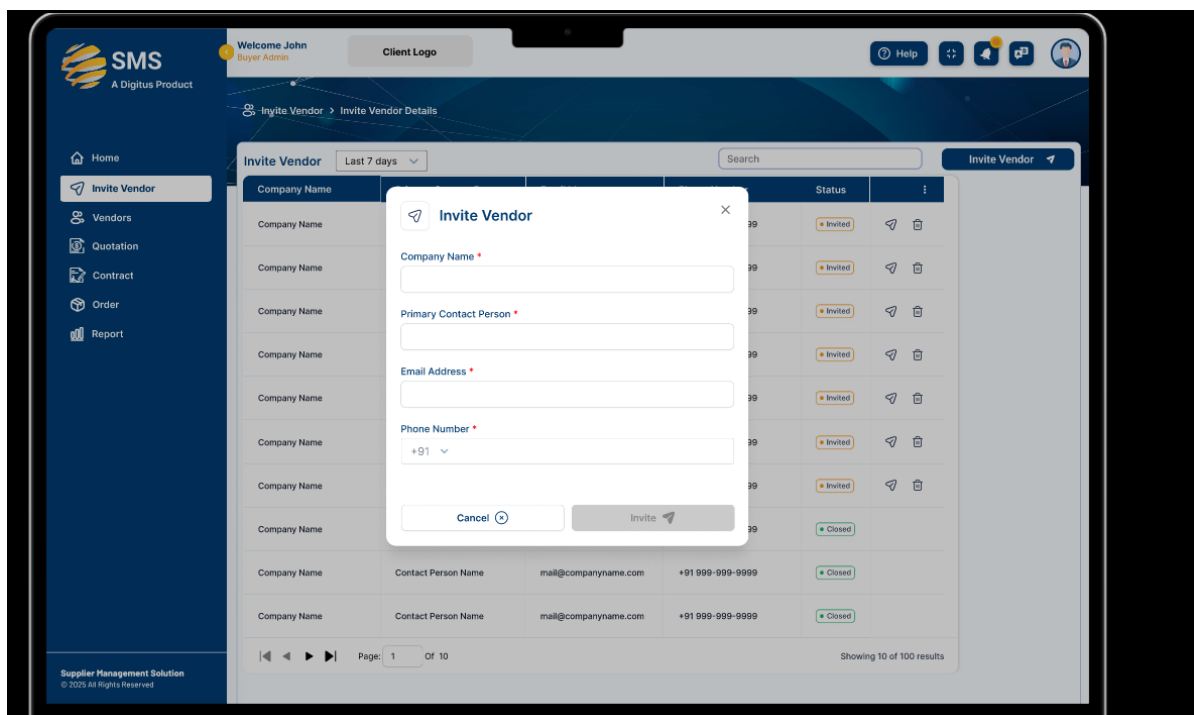
The screenshot shows the 'Create Requisition' form. The form has a header with 'Welcome Cristian Business User' and a 'Create Requisition' button. The form fields are organized into two columns. The left column contains 'Requisition Type' (dropdown), 'Business Unit' (dropdown), 'Requester' (text input), and 'Priority' (dropdown). The right column contains 'Delivery Date' (date input), 'Due Date' (date input), 'Ship To' (text input), and 'Justification' (text area). Below the form is a table with columns: 'Request Type', 'Item Name', 'Quantity', 'Currency', 'Budgetary Cost', 'Remark', and 'Action'. The table has one row with dropdown menus for 'Request Type' and 'Item Name', and input fields for 'Quantity', 'Currency', 'Budgetary Cost', and 'Remark'. An 'Add More' button is at the bottom right of the table.

How to invite a Supplier?

- Hover over the sidebar to expand it, then click on **"Invite Vendor."**
- In the top-right corner, click the **"Invite Vendor"** button.
- A pop-up window will appear where you can enter the necessary details to invite the supplier.

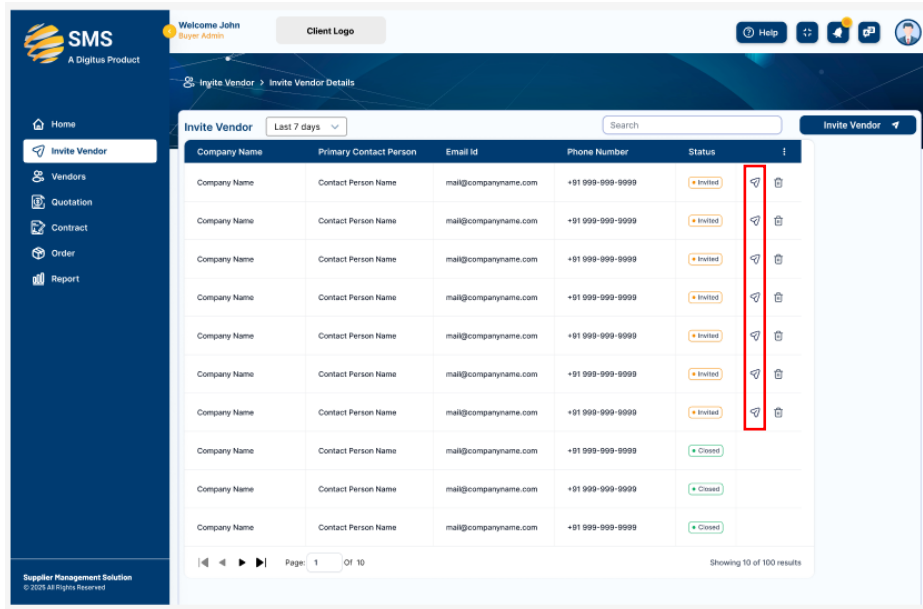


- In the pop-up, enter all the vendor details and click the 'Invite' button to send the invitation to the vendor.

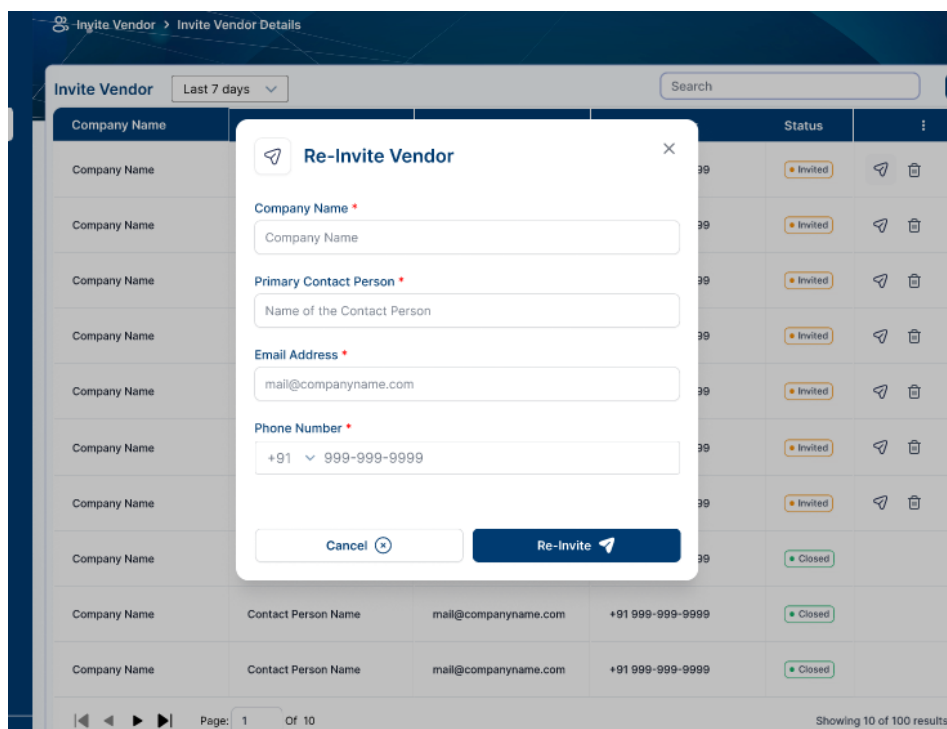


How to re-invite the vendor?

- On the Invite Vendor page, locate the Send icon in the table.
- Click the icon to open the Re-invite pop-up window.

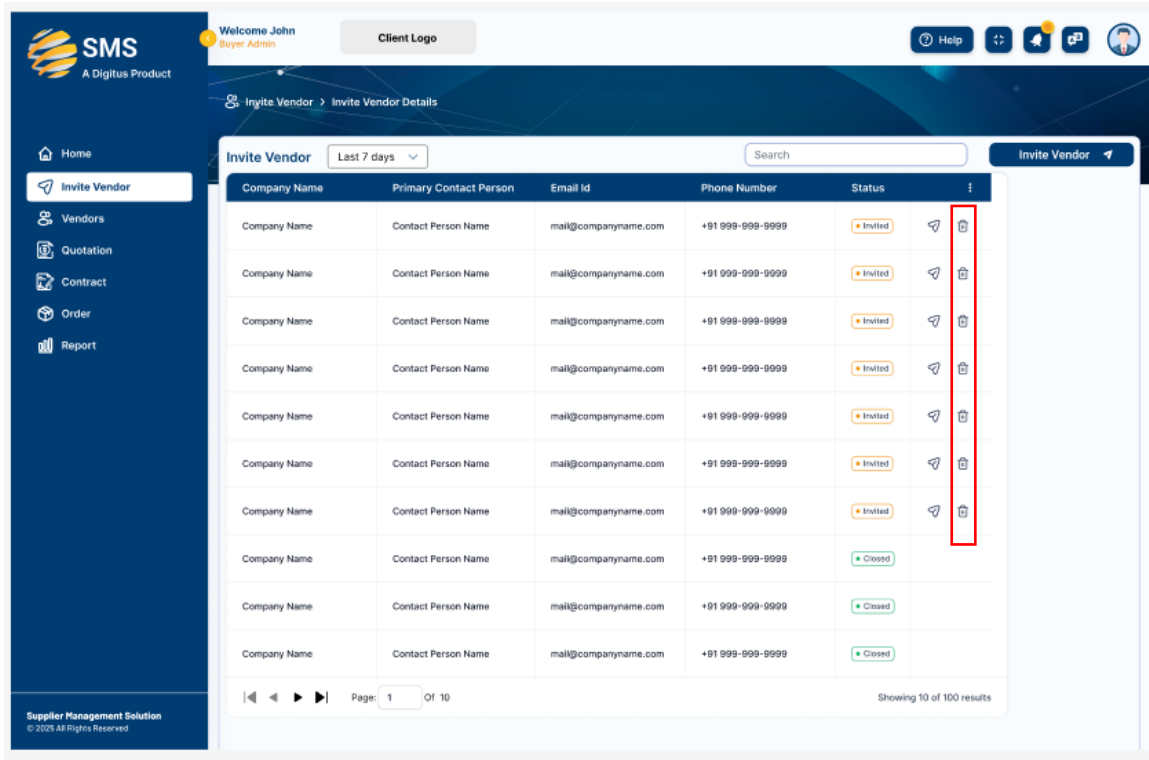


- In the pop-up, you can edit the vendor details if needed.
- Click the **Re-invite** button to resend the invitation to the vendor.
- A confirmation message will appear asking whether you want to send the email.
- Click **Confirm** to send the email, or click **Cancel** to close the pop-up without sending.



How to Delete an Invited Vendor

- On the Invite Vendor page, locate the Delete icon in the table.
- Click the Delete icon to initiate the deletion of the vendor invitation.
- A confirmation pop-up will appear asking you to confirm the deletion.



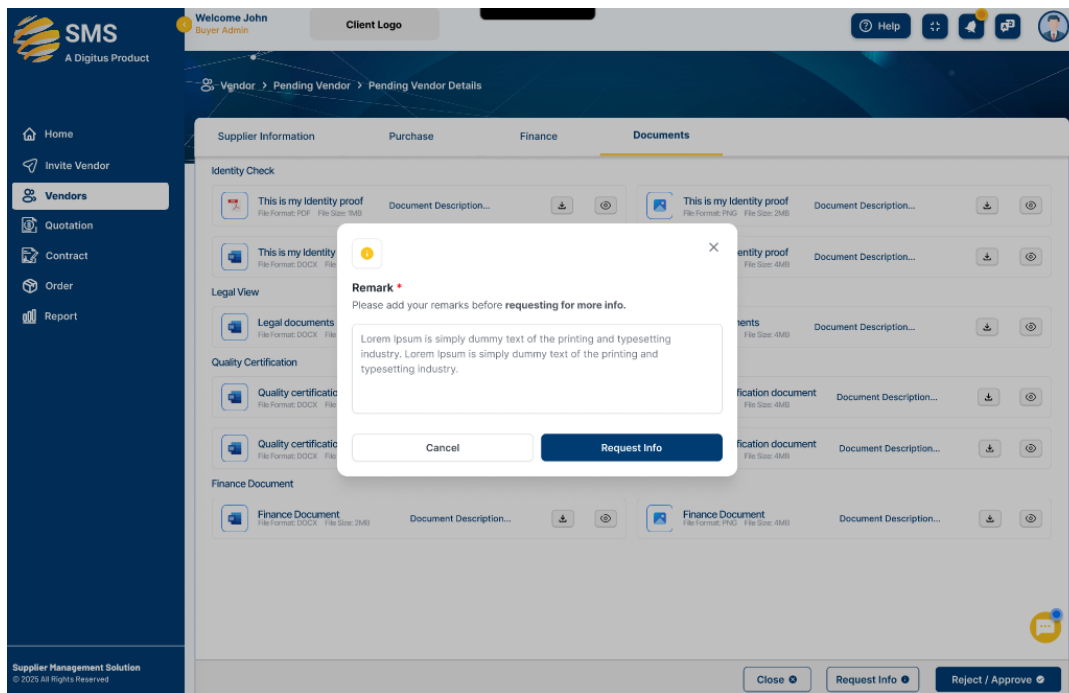
The screenshot displays the 'Invite Vendor' page in the Supplier Management Solution. The page includes a sidebar with navigation links: Home, Invite Vendor, Vendors, Quotation, Contract, Order, and Report. The main content area shows a table of invited vendors. A red box highlights the delete icon (trash can) in the first row of the table. The table has the following columns: Company Name, Primary Contact Person, Email Id, Phone Number, Status, and a delete icon. The first 7 rows have a status of 'Invited', and the last 3 rows have a status of 'Closed'.

Company Name	Primary Contact Person	Email Id	Phone Number	Status	Delete Icon
Company Name	Contact Person Name	mail@companyname.com	+91 999-999-9999	Invited	🗑️
Company Name	Contact Person Name	mail@companyname.com	+91 999-999-9999	Invited	🗑️
Company Name	Contact Person Name	mail@companyname.com	+91 999-999-9999	Invited	🗑️
Company Name	Contact Person Name	mail@companyname.com	+91 999-999-9999	Invited	🗑️
Company Name	Contact Person Name	mail@companyname.com	+91 999-999-9999	Invited	🗑️
Company Name	Contact Person Name	mail@companyname.com	+91 999-999-9999	Invited	🗑️
Company Name	Contact Person Name	mail@companyname.com	+91 999-999-9999	Invited	🗑️
Company Name	Contact Person Name	mail@companyname.com	+91 999-999-9999	Closed	
Company Name	Contact Person Name	mail@companyname.com	+91 999-999-9999	Closed	
Company Name	Contact Person Name	mail@companyname.com	+91 999-999-9999	Closed	

Page: 1 Of 10
Showing 10 of 100 results

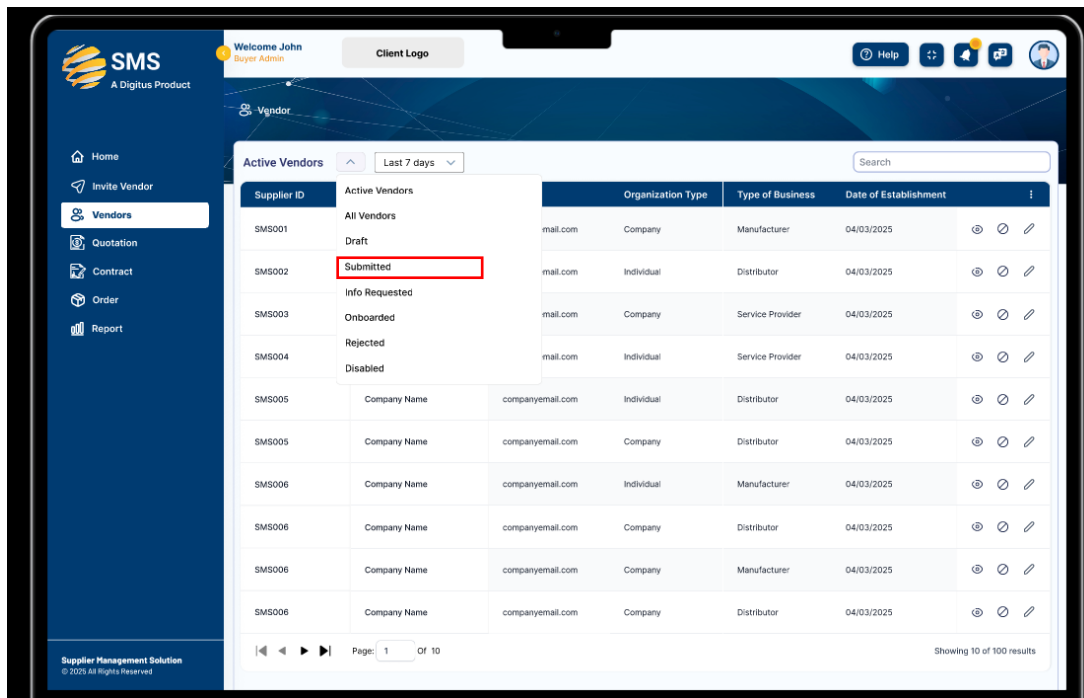
What is "Request for More Info"?

- "Request for More Info" is used when a vendor has not provided all the required details.
- The Buyer Admin can use this option to request additional information from the vendor in order to proceed.
- Once a request for more information is made, the vendor will be able to edit and update the submitted details accordingly.

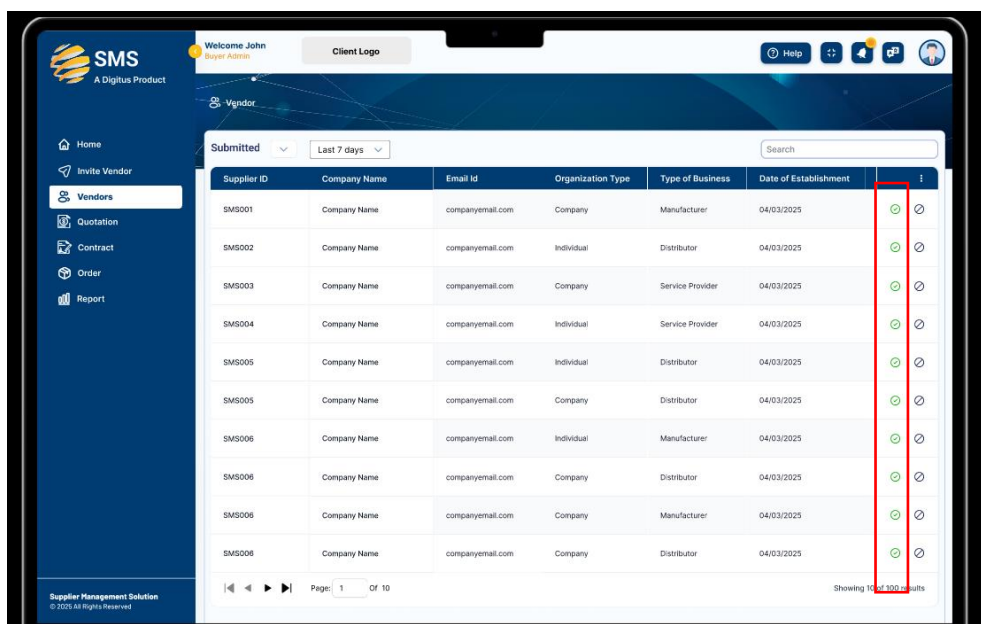


How to Approve and Onboard a Vendor













- Navigate to the Vendor page.
- Click on the dropdown menu to select the Vendor Type.
- From the dropdown, select a Submitted Vendor to review and proceed with the approval process.



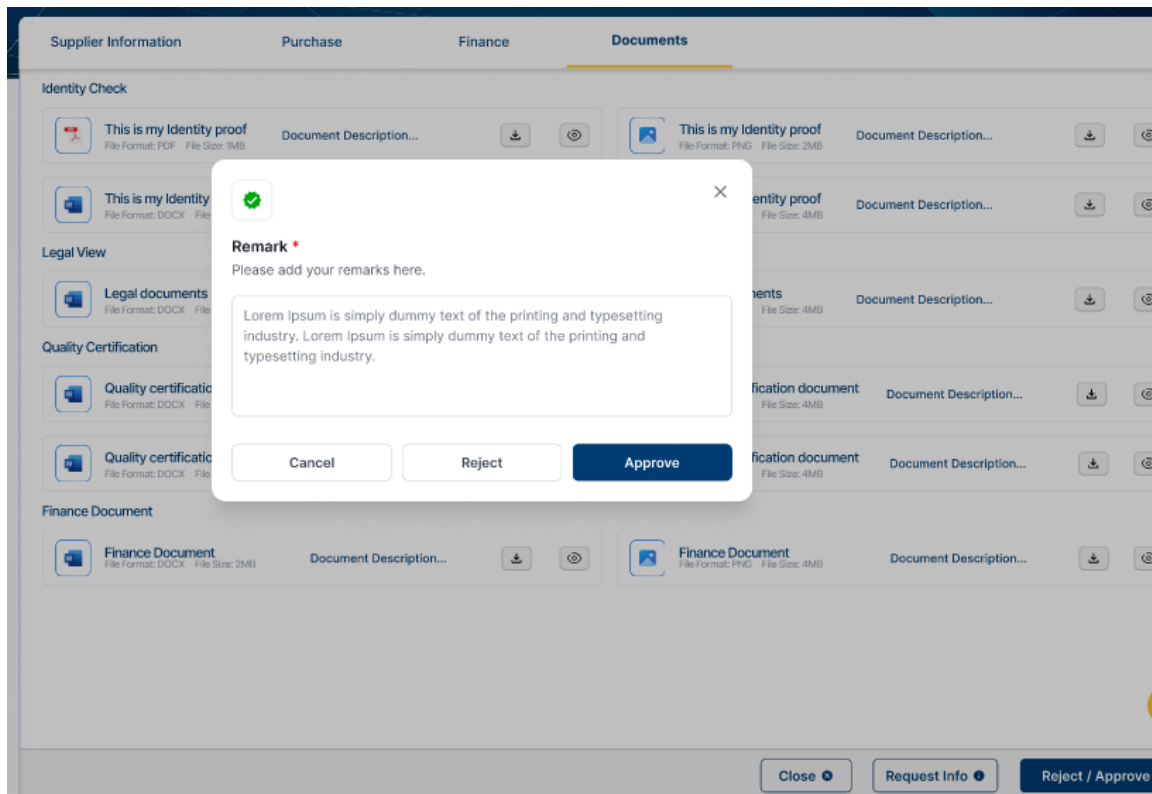
- In the submitted vendor table click on the approve button on the table
- A window will open with the vendor details



Supplier Information	Purchase	Finance	Documents
Supplier ID : SMS001		Company Name * : My Company	
Organization Type * : Individual		Display Name * : Jacob	
Primary Contact Person * : Full Name		Type of Business * : Service Provider	
Email Address * : mail@compamyname.com		Date of Establishment : 20-11-2019 (DD/MM/YYYY)	
Phone Number * : +91 9929263827		Job Title * : Job Title	
Telephone : 080-56789012		ERP Reference Number : ERP-REF0001	
Group supplier code : GSUP001			
Other Details			
GST Treatment * : Registered Business		GSTIN/UIN : 29ABCDE1234F1Z5	
MSME Registered? <input checked="" type="checkbox"/> This vendor is MSME registered		Source of Supply * : Source of supply	
MSME/Udyam Registration Type * : Micro Enterprise		PAN : JSUPP6310G	
MSME/Udyam Registration Number * : UDYAM-XX-00-1234567		TDS : 5%	
<div>Close</div> <div>Next →</div>			

Supplier Information	Purchase	Finance	Documents
Identity Check			
 This is my identity proof <small>File Format: PDF File Size: 1MB</small>		 This is my identity proof <small>File Format: PNG File Size: 2MB</small>	
 This is my identity proof <small>File Format: DOCX File Size: 2MB</small>		 This is my identity proof <small>File Format: PNG File Size: 4MB</small>	
Legal View			
 Legal documents <small>File Format: DOCX File Size: 2MB</small>		 Legal documents <small>File Format: PNG File Size: 4MB</small>	
Quality Certification			
 Quality certification document <small>File Format: DOCX File Size: 2MB</small>		 Quality certification document <small>File Format: PNG File Size: 4MB</small>	
 Quality certification document <small>File Format: DOCX File Size: 2MB</small>		 Quality certification document <small>File Format: PNG File Size: 4MB</small>	
Finance Document			
 Finance Document <small>File Format: DOCX File Size: 2MB</small>		 Finance Document <small>File Format: PNG File Size: 4MB</small>	
<div>Close</div> <div>Request Info</div> <div>Reject / Approve</div>			

- If all the details are correct, you can approve the vendor by clicking the **"Approve"** button.
- If not, you can choose to **Reject** the vendor and add a **remark** explaining the reason.



- Click on "**Remark**" to add a comment before approving or rejecting the vendor.