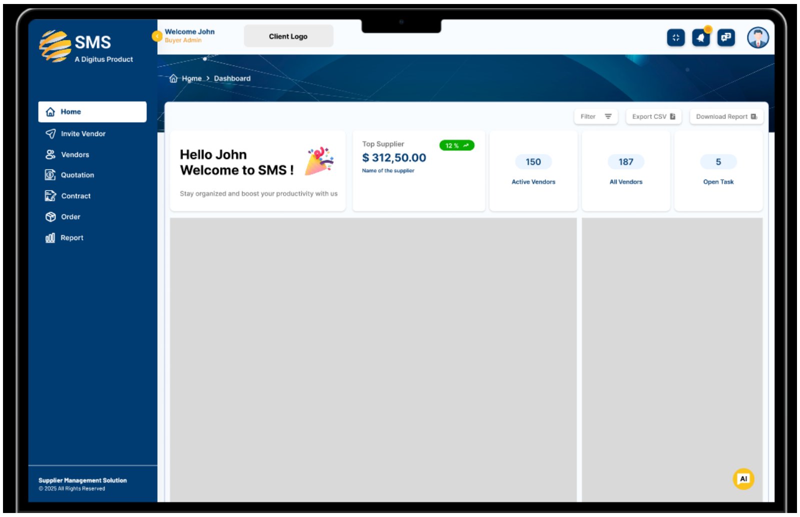
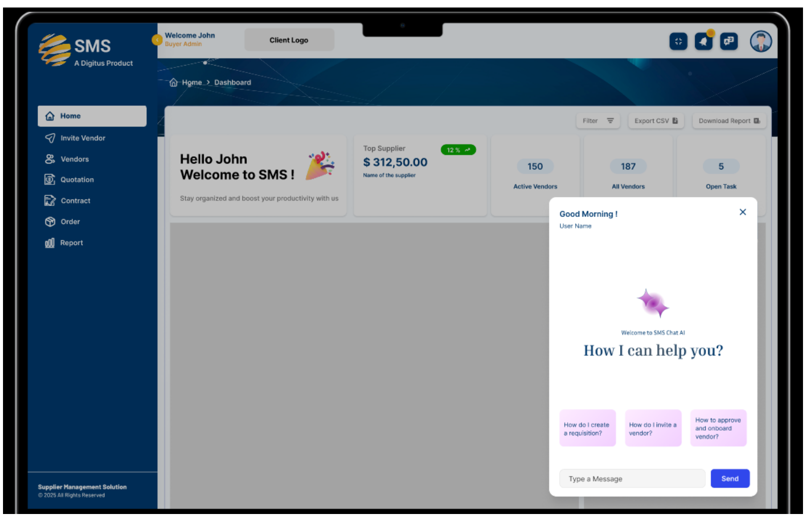
SMS User Guide

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.

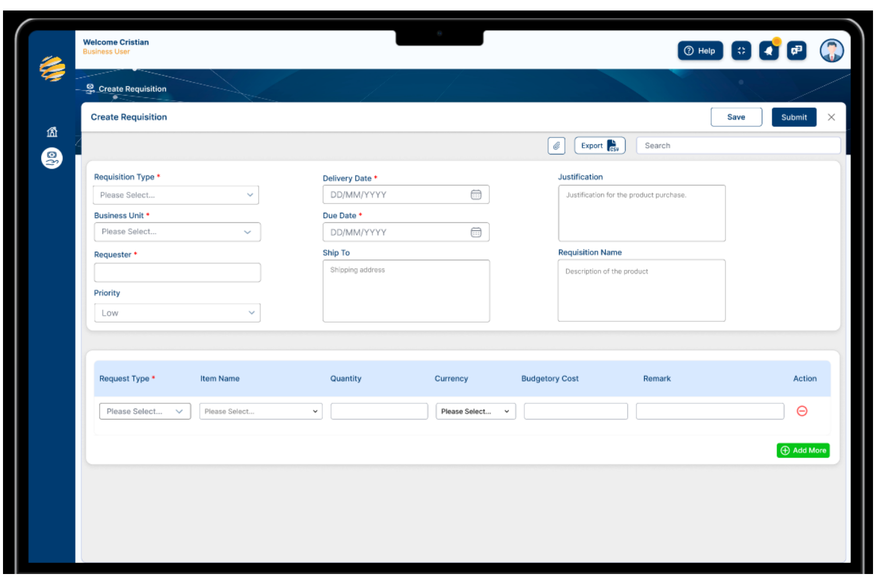


Here in this page, we have the chat window opened where we can enter whatever you want to ask to the AI bot.

How do I create a requisition?

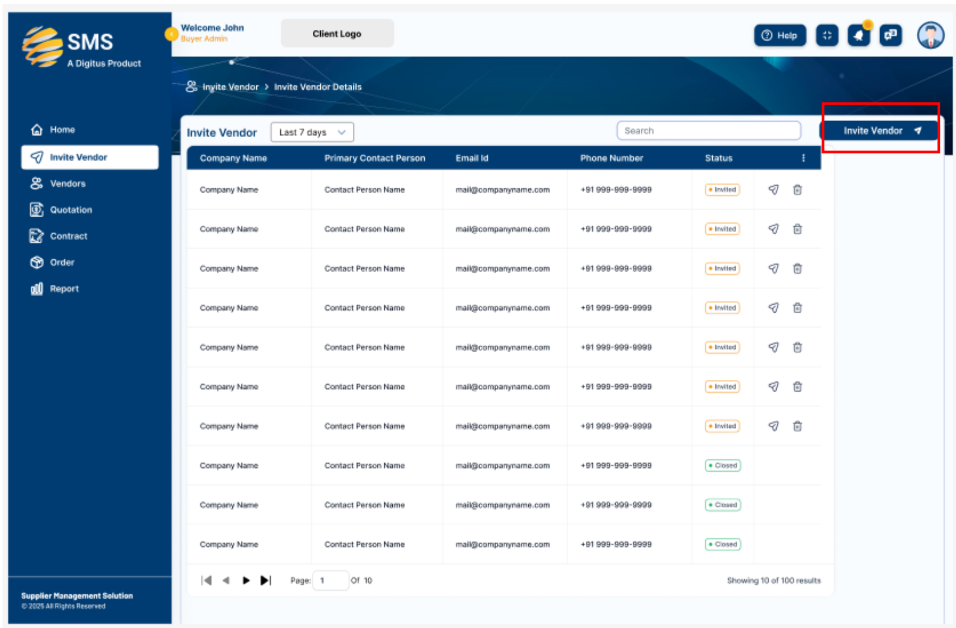
To create a requisition, follow the steps below:

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.

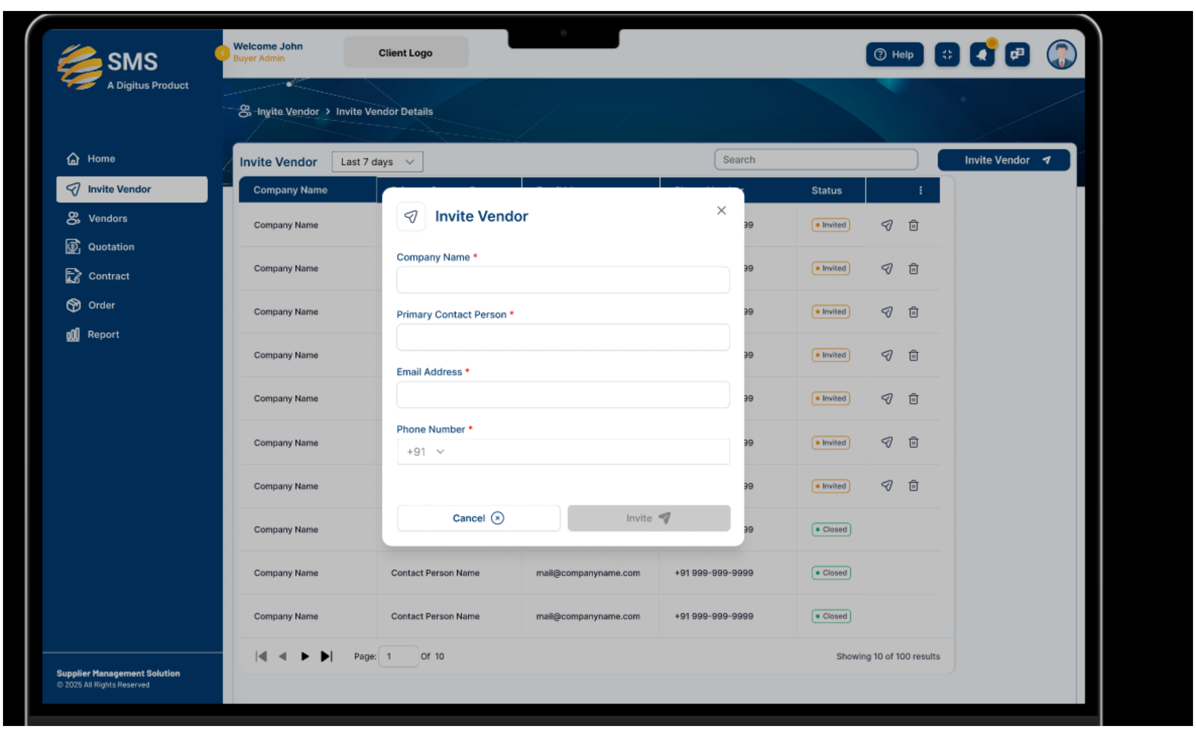


How to invite a Supplier?

- 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.

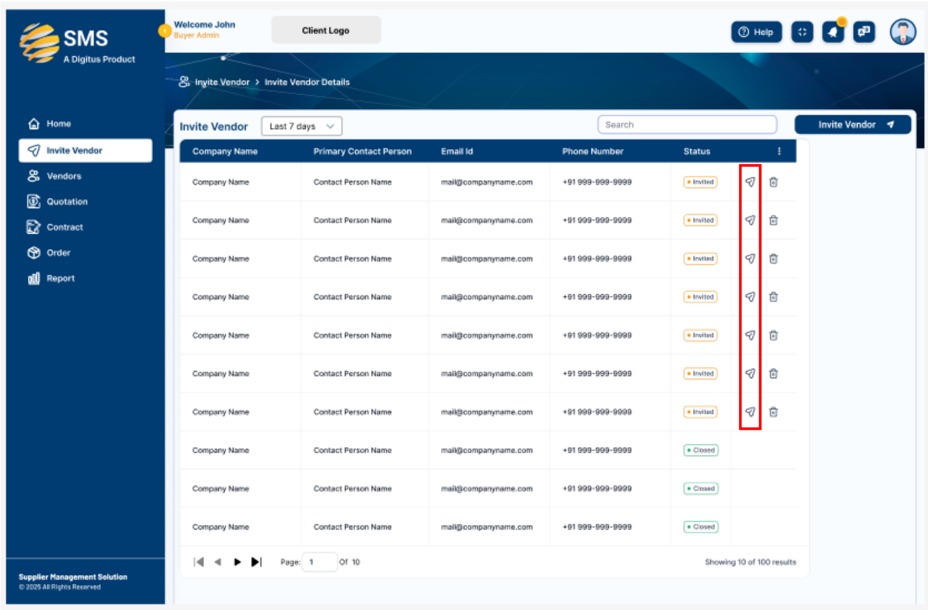


- In the pop-up, enter all the vendor details and click the 'Invite' button to send the invitation to the vendor.

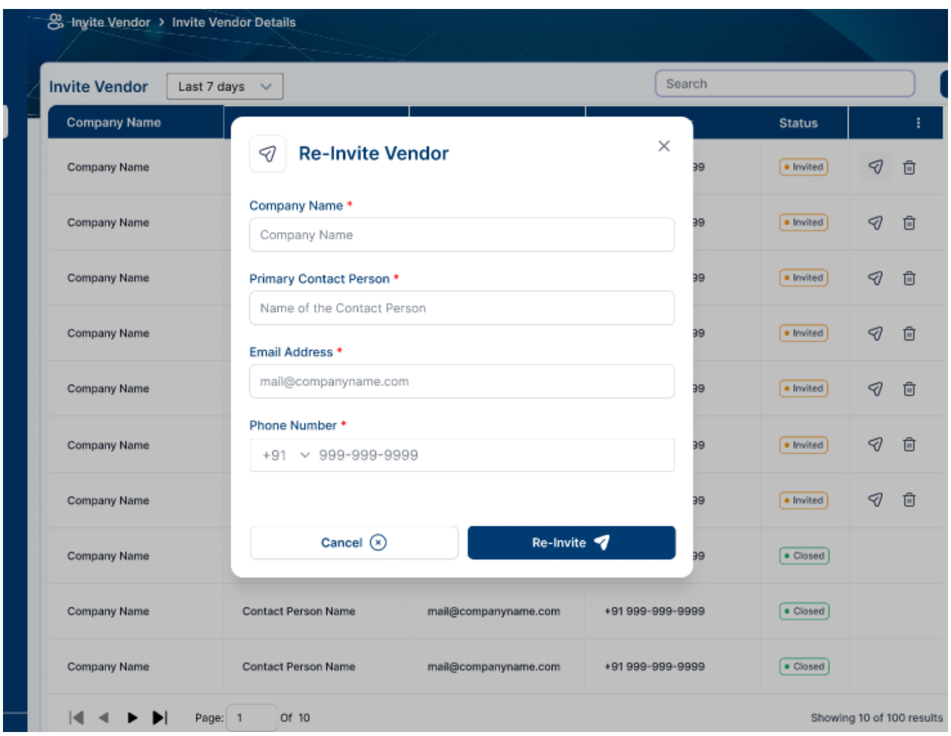


How to re-invite the vendor?

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

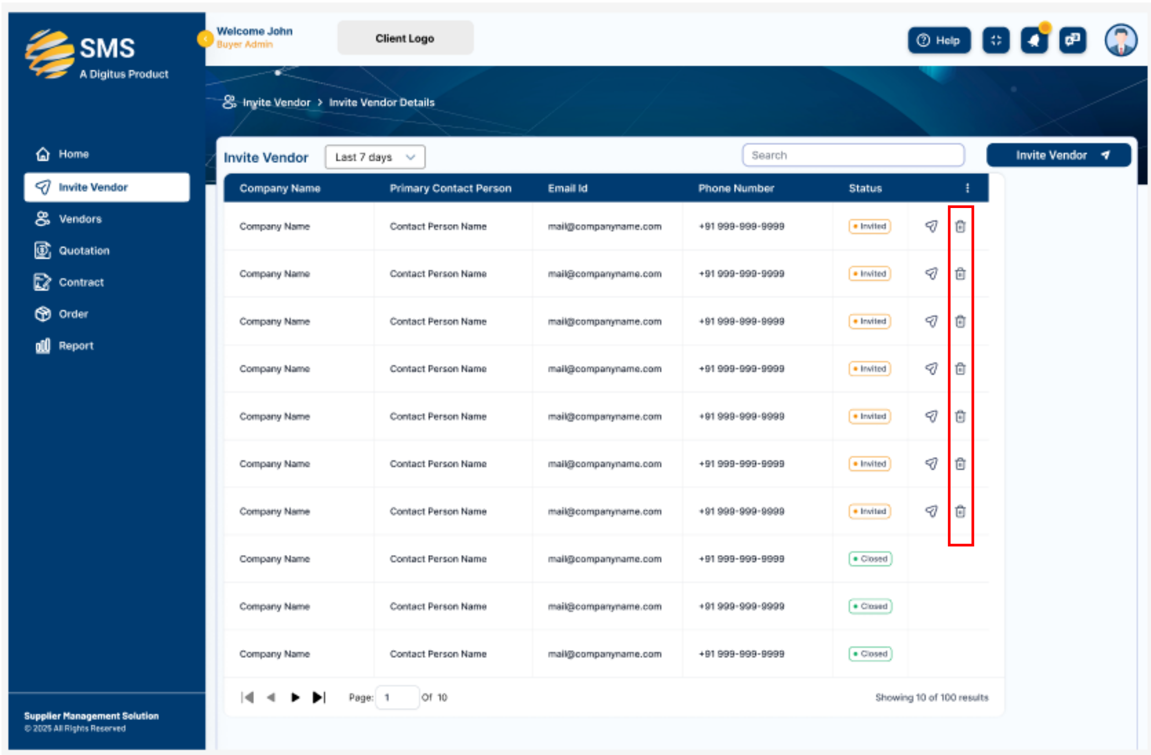


- In the pop-up, you can edit the vendor details if needed.
- Click the **Re-invite** button to resend the invitation to the vendor.
- A confirmation message will appear asking whether you want to send the email.
- Click **Confirm** to send the email, or click **Cancel** to close the pop-up without sending.



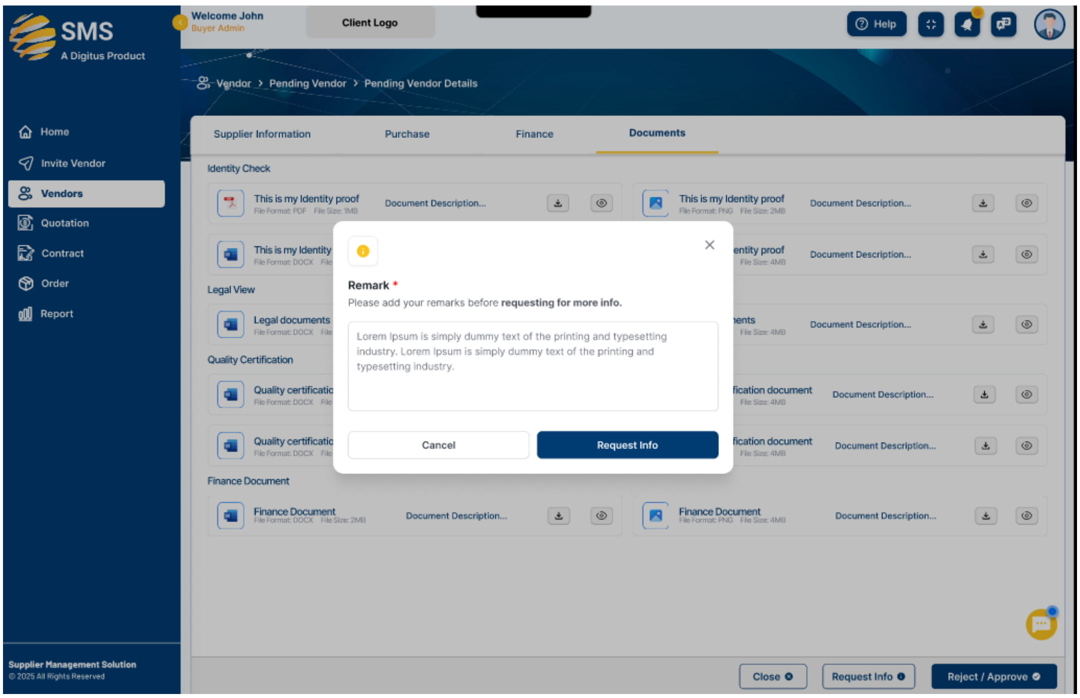
How to Delete an Invited Vendor

- 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.



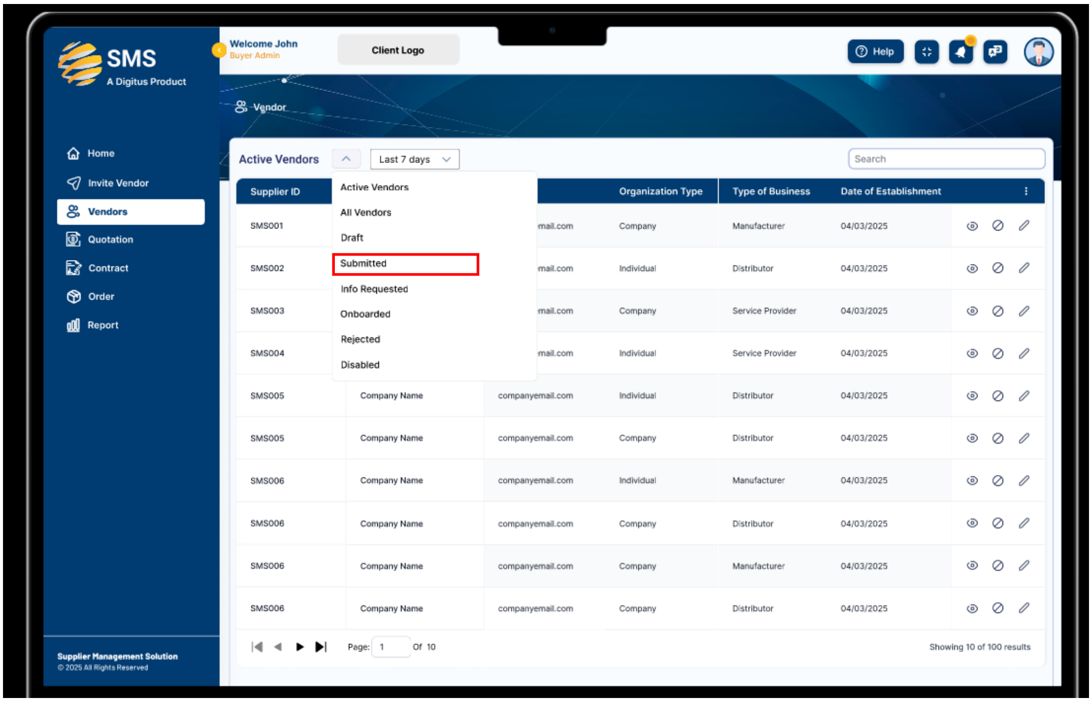
What is "Request for More Info"?

- "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.

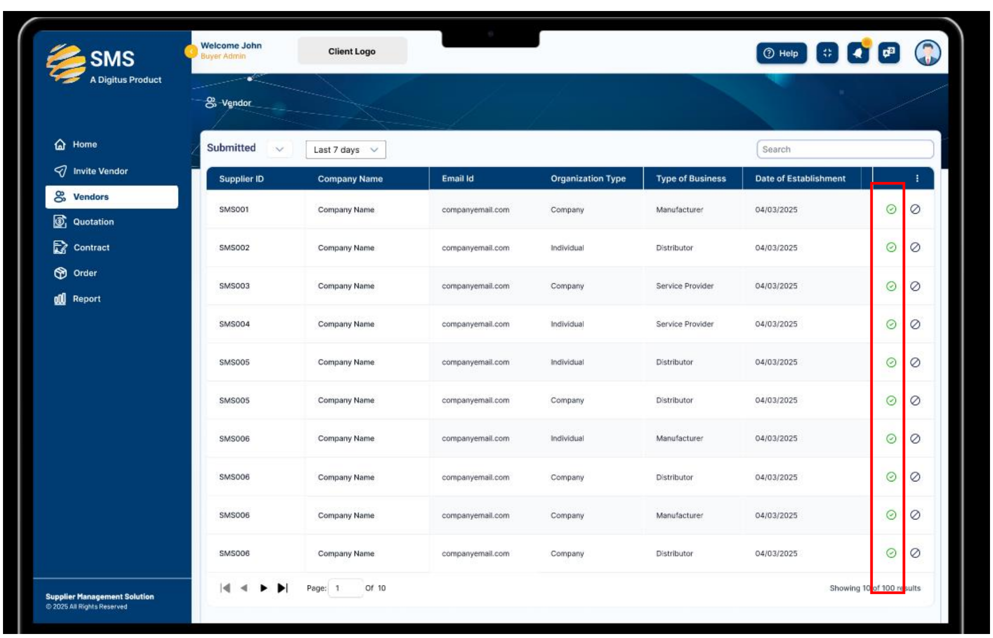


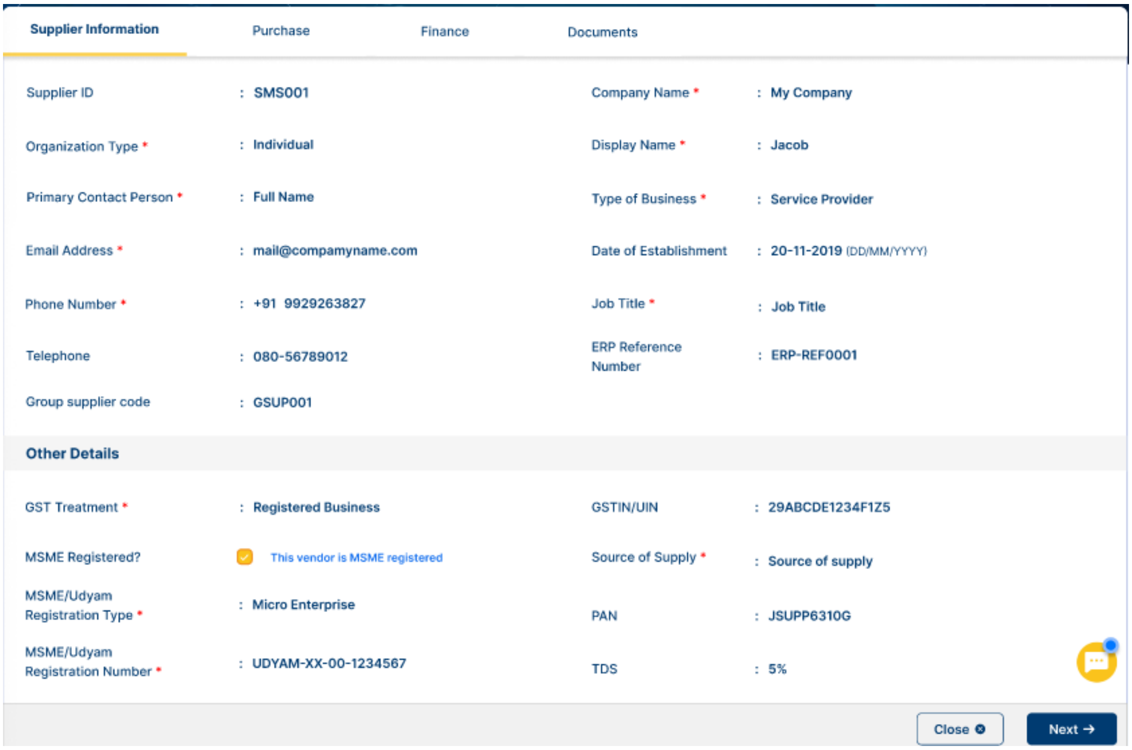
How to Approve and Onboard a Vendor

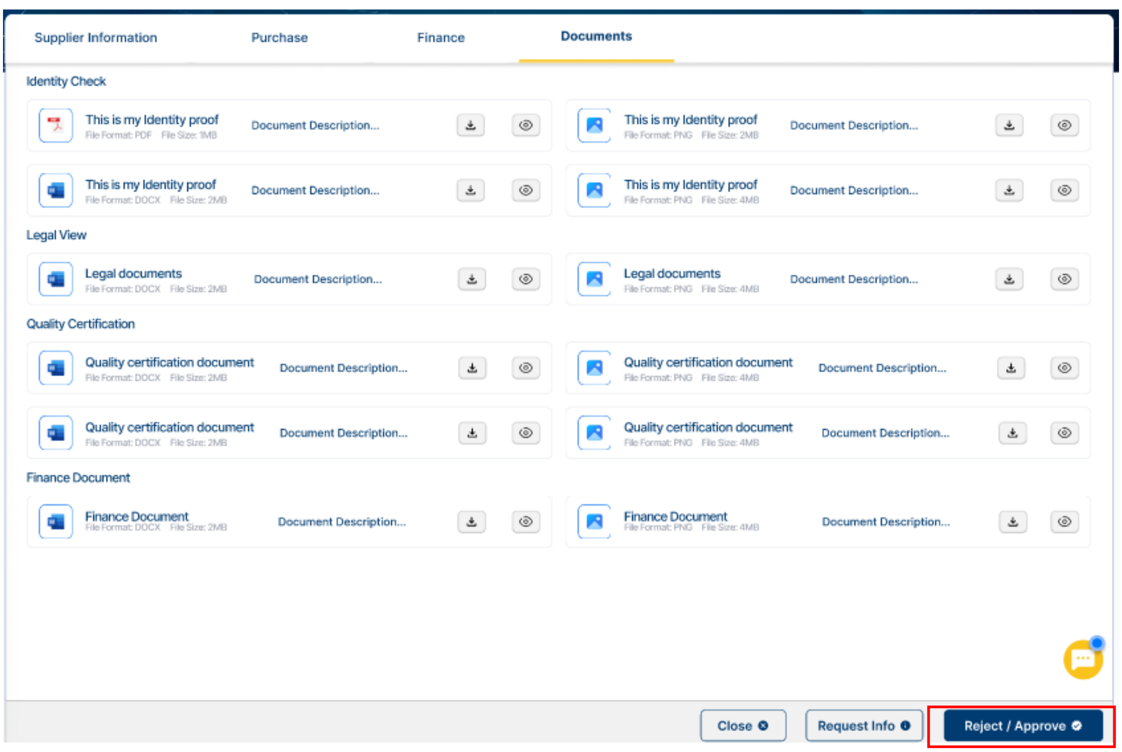
- Navigate to the Vendor page.
- Click on the dropdown menu to select the Vendor Type.
- From the dropdown, select a Submitted Vendor to review and proceed with the approval process.



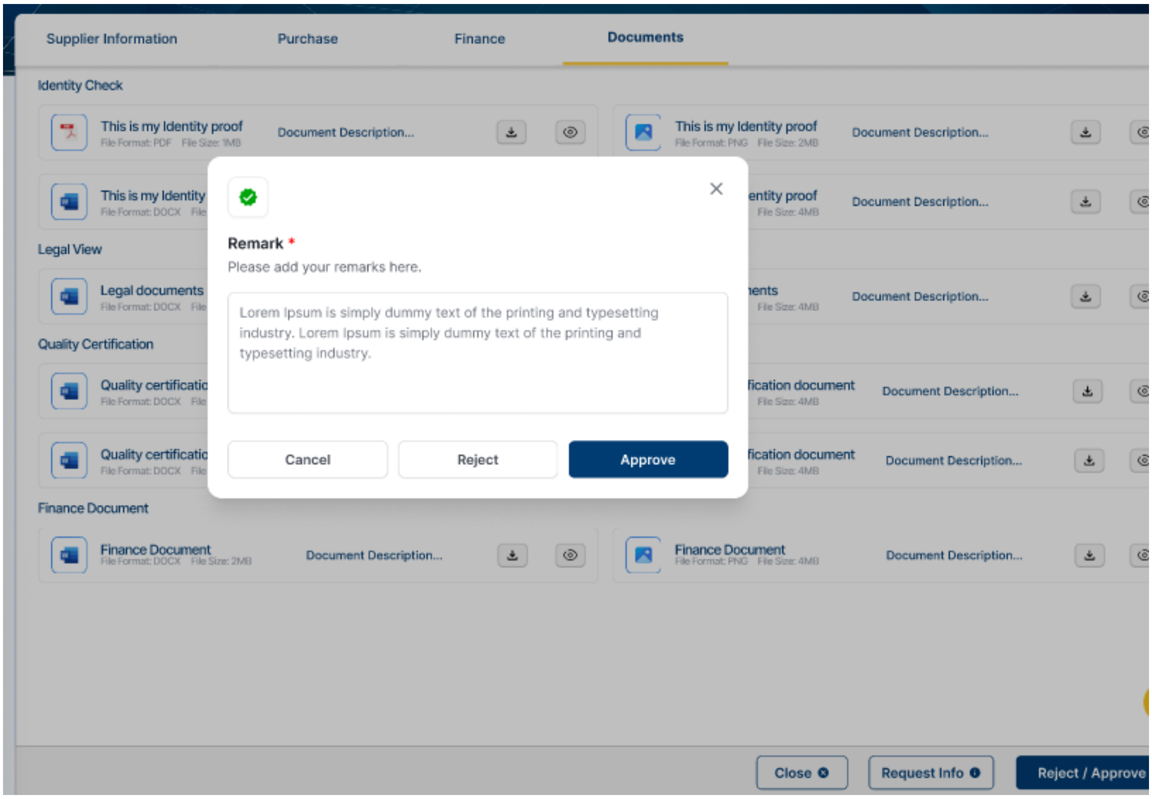
- In the submitted vendor table click on the approve button on the table
- A window will open with the vendor details







- 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.