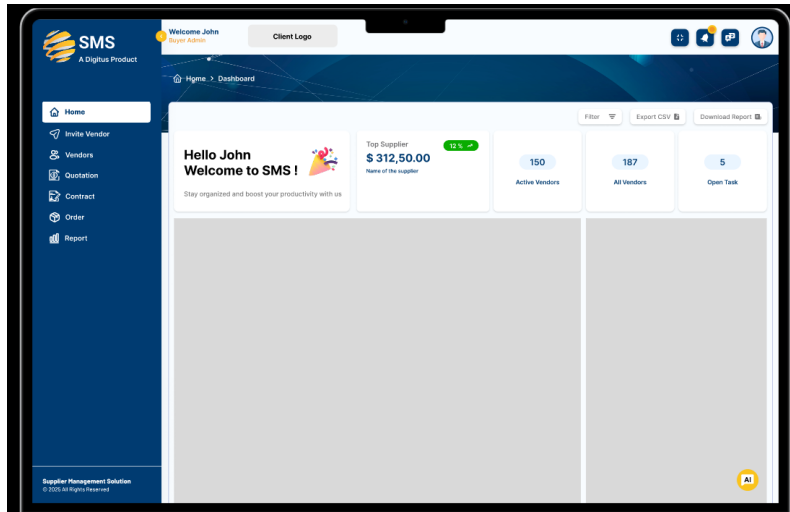


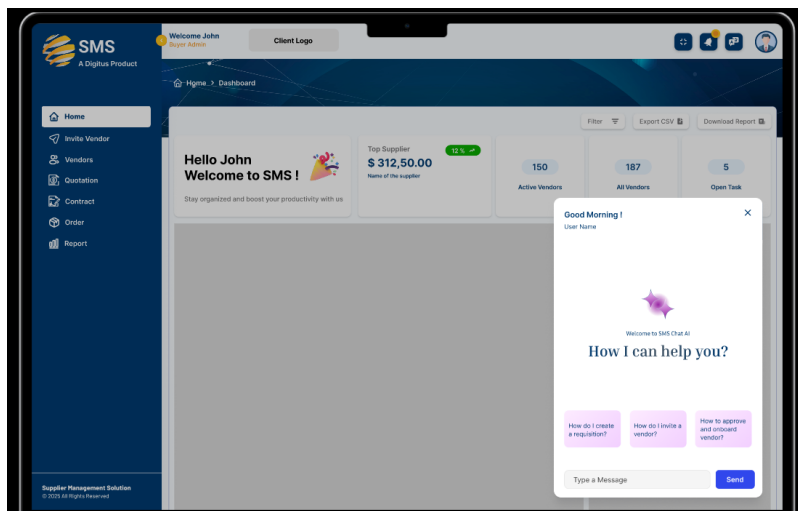
# SMS User Guide

## 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.

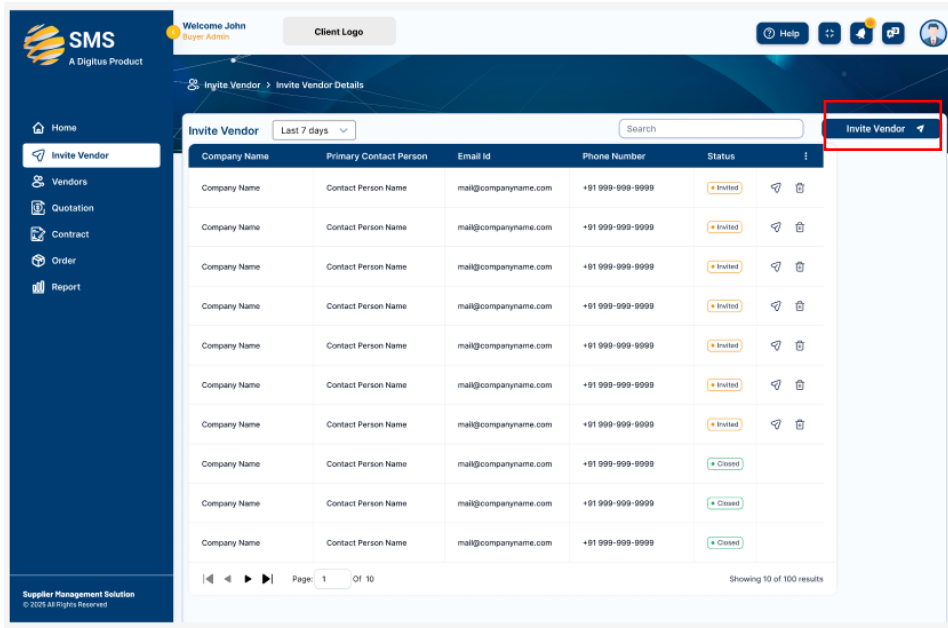
The screenshot shows a web application interface for creating a requisition. The top navigation bar includes a welcome message 'Welcome Cristian Business User' and utility icons for Help, Settings, Notifications, and Profile. The main content area is titled 'Create Requisition' and contains a form with the following fields:

- Requisition Type**: A dropdown menu with 'Please Select...' as the placeholder.
- Business Unit**: A dropdown menu with 'Please Select...' as the placeholder.
- Requester**: A text input field.
- Priority**: A dropdown menu with 'LOW' as the selected value.
- Delivery Date**: A date input field with the format 'DD/MM/YYYY'.
- Due Date**: A date input field with the format 'DD/MM/YYYY'.
- Ship To**: A text input field with the placeholder 'Shipping address'.
- Justification**: A text area with the placeholder 'Justification for the product purchase'.
- Requisition Name**: A text area with the placeholder 'Description of the product'.

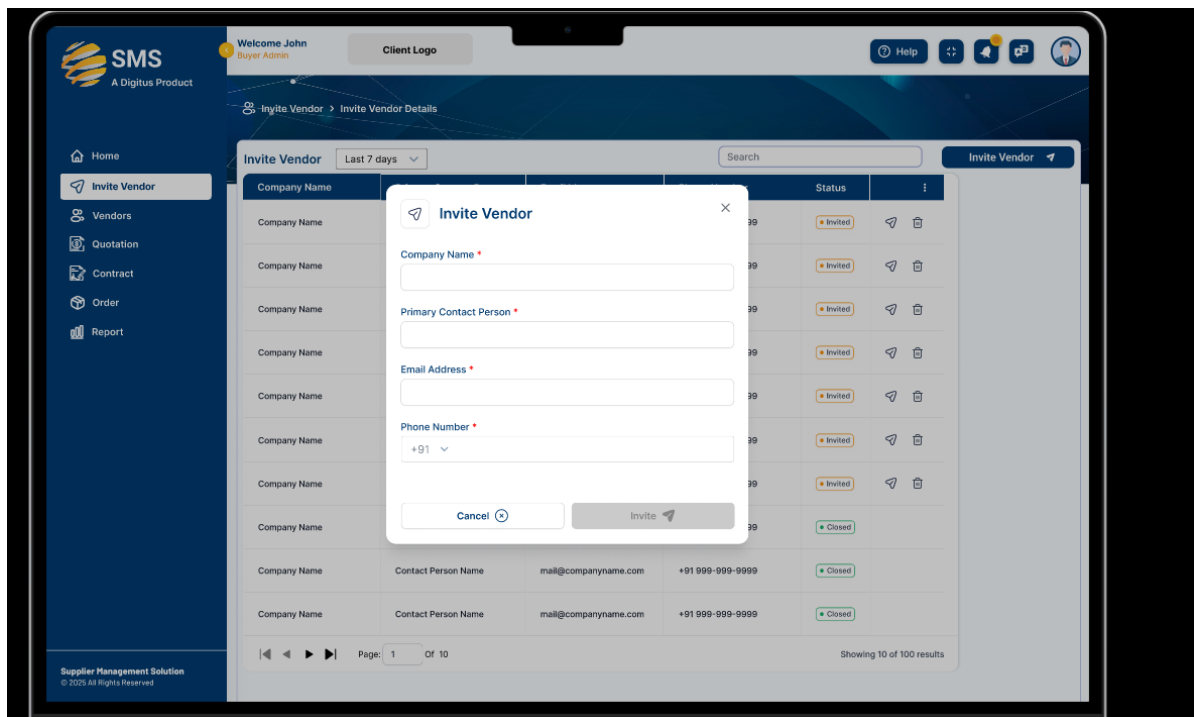
Below the form is a table with the following columns: Request Type, Item Name, Quantity, Currency, Budgetary Cost, Remark, and Action. The table currently has one row with all fields set to 'Please Select...' or empty. An 'Add More' button is located at the bottom right of the table.

## 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.

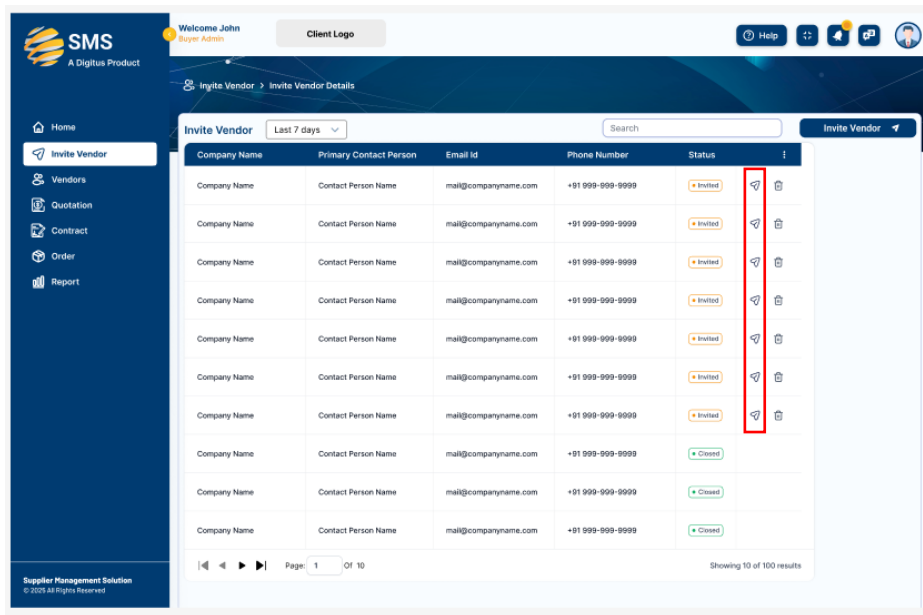


- In the pop-up, enter all the vendor details and click the 'Invite' button to send the invitation to the vendor.

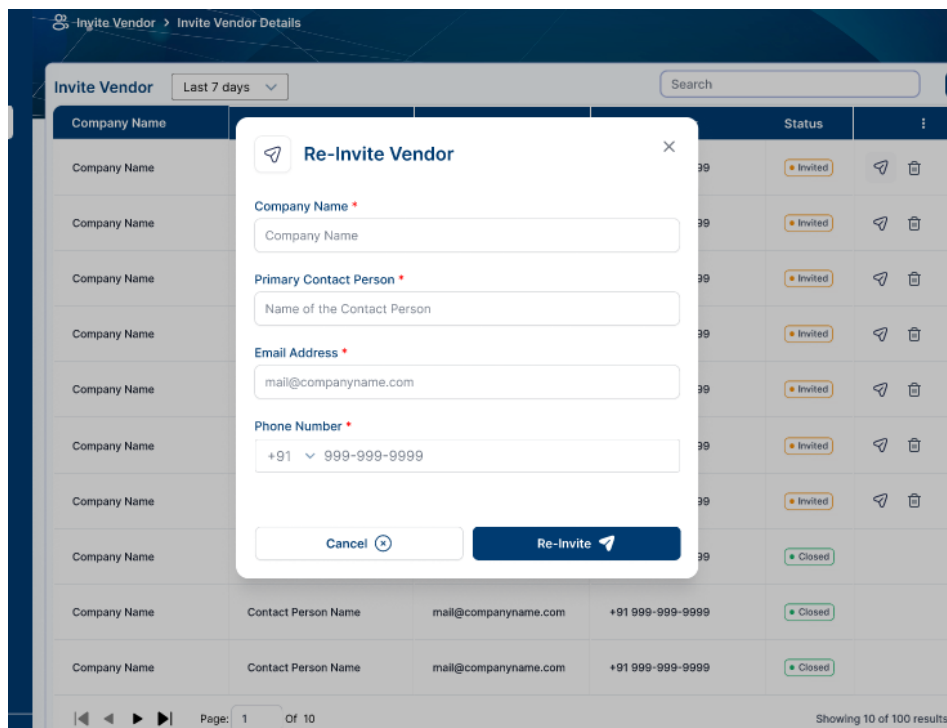


## How to re-invite the vendor?

- 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

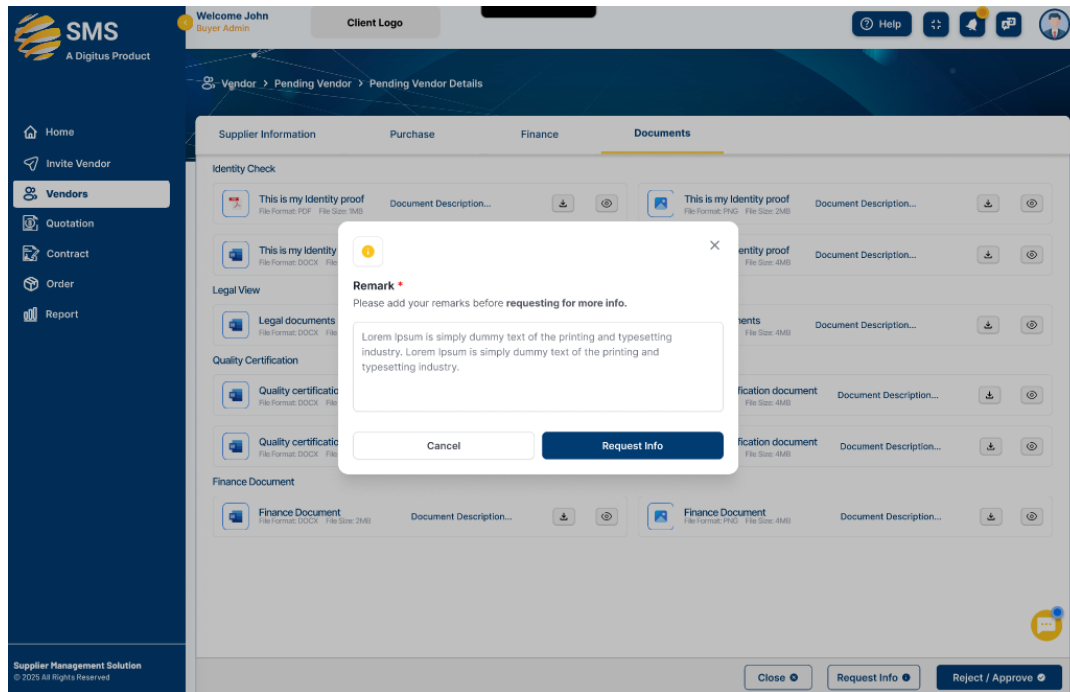
- On the Invite Vendor page, locate the Delete icon in the table.
- Click the Delete icon to initiate the deletion of the vendor invitation.
- A confirmation pop-up will appear asking you to confirm the deletion.

The screenshot displays the 'Invite Vendor' page in the SMS Buyer Admin interface. The page features 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 (a trash can) in the rightmost column of the table, specifically for the first row. The table has columns for Company Name, Primary Contact Person, Email Id, Phone Number, and Status. The status for the first seven rows is 'Invited', and for the last three rows, it is 'Closed'. The page also includes a search bar, a filter for 'Last 7 days', and a pagination bar at the bottom indicating 'Page: 1 Of 10' and 'Showing 10 of 100 results'.

Company Name	Primary Contact Person	Email Id	Phone Number	Status	
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	

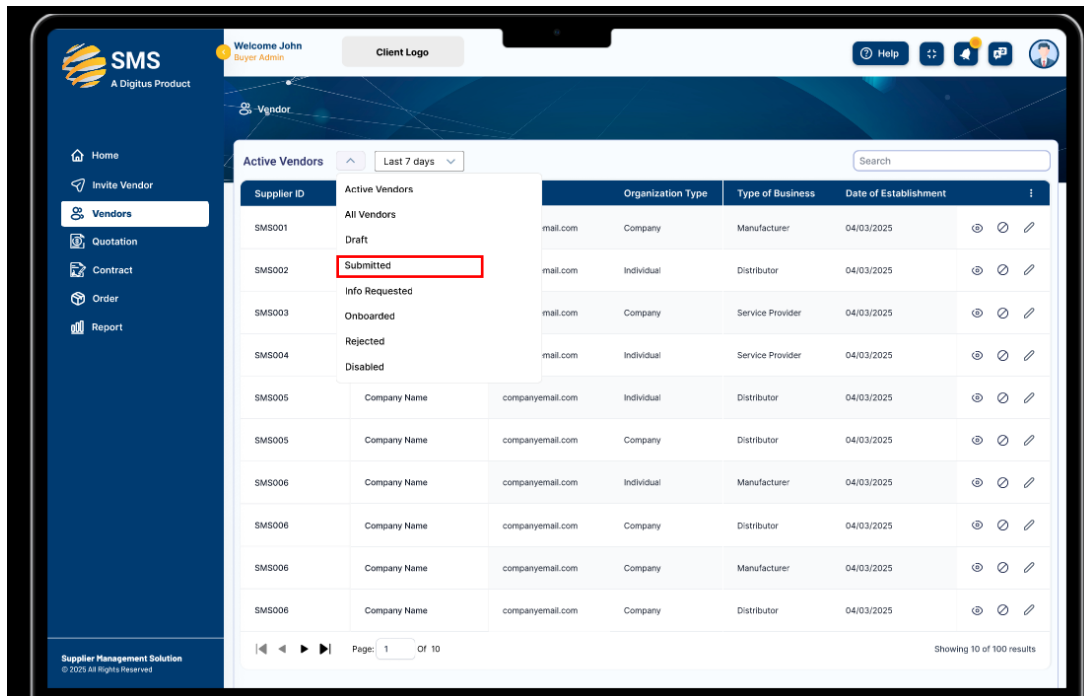
## What is "Request for More Info"?

- "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.

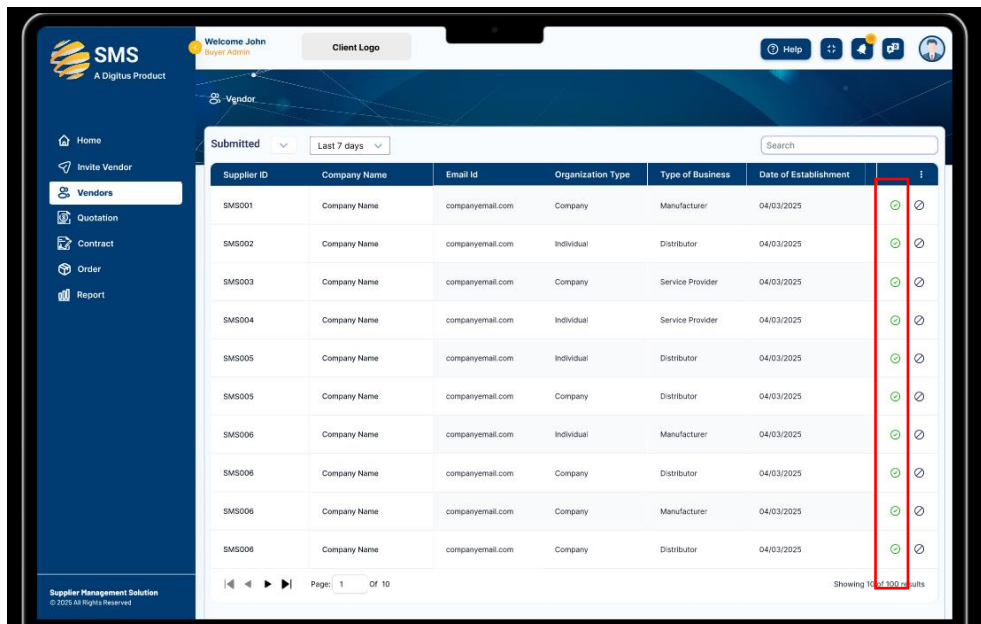


## How to Approve and Onboard a Vendor

- 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@compamynname.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			
<b>Other Details</b>			
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%	

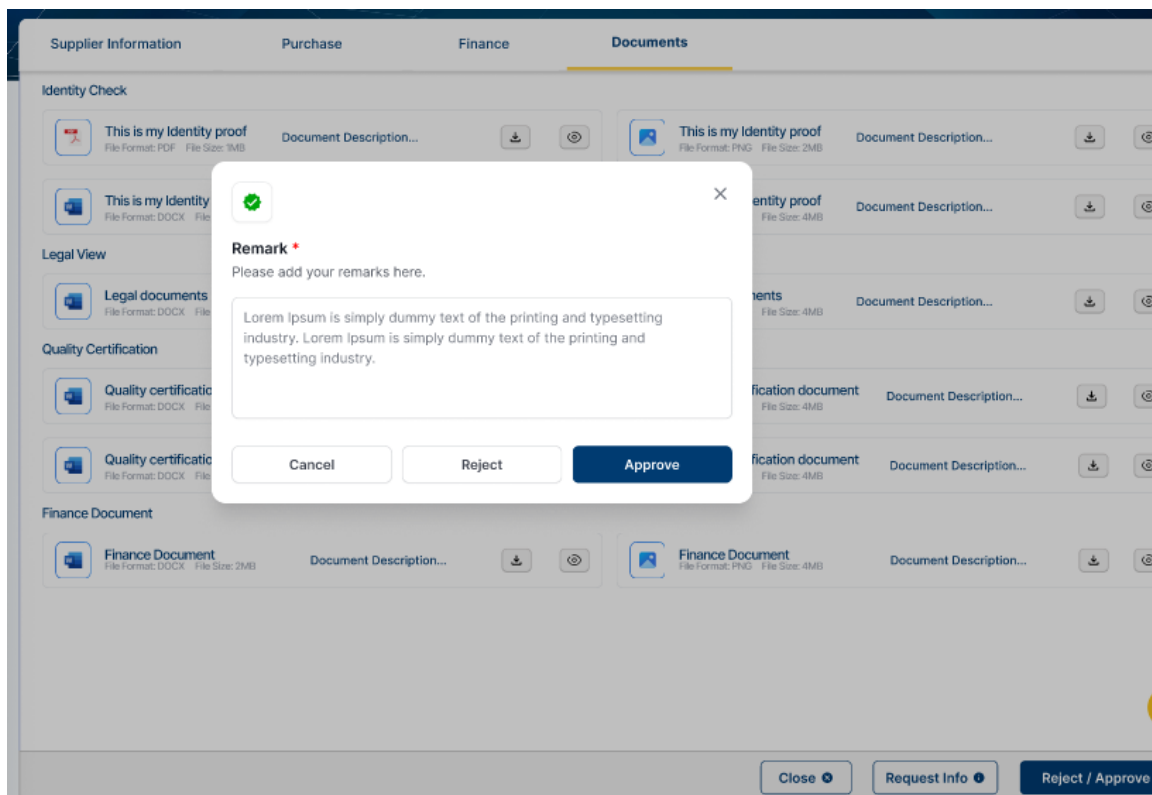
Close Next →

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

Close Request Info Reject / Approve

- 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.