USER MANUAL

SOLICITEL APPLICATION

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1. INTRODUCTION

This document provides a user manual for Solicitel Application. To provide a comprehensive guide for each user view and its functionality. It is important that users have a brief understanding about the project.
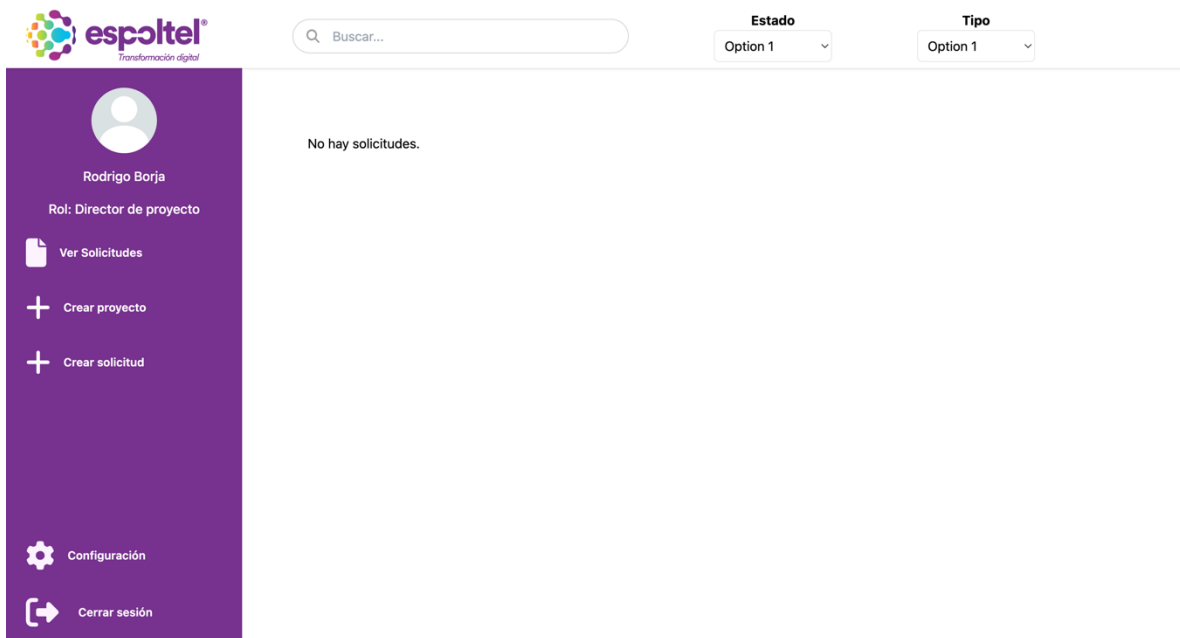
2. APPLICATION

Project Manager

LOGIN

The project manager can log in with their respective credentials.

Afterwards, the user will be redirected to the main page where the purchase requisitions can be viewed. The project manager will be shown the options: View Requisitions, Create Project and Create Requisition.
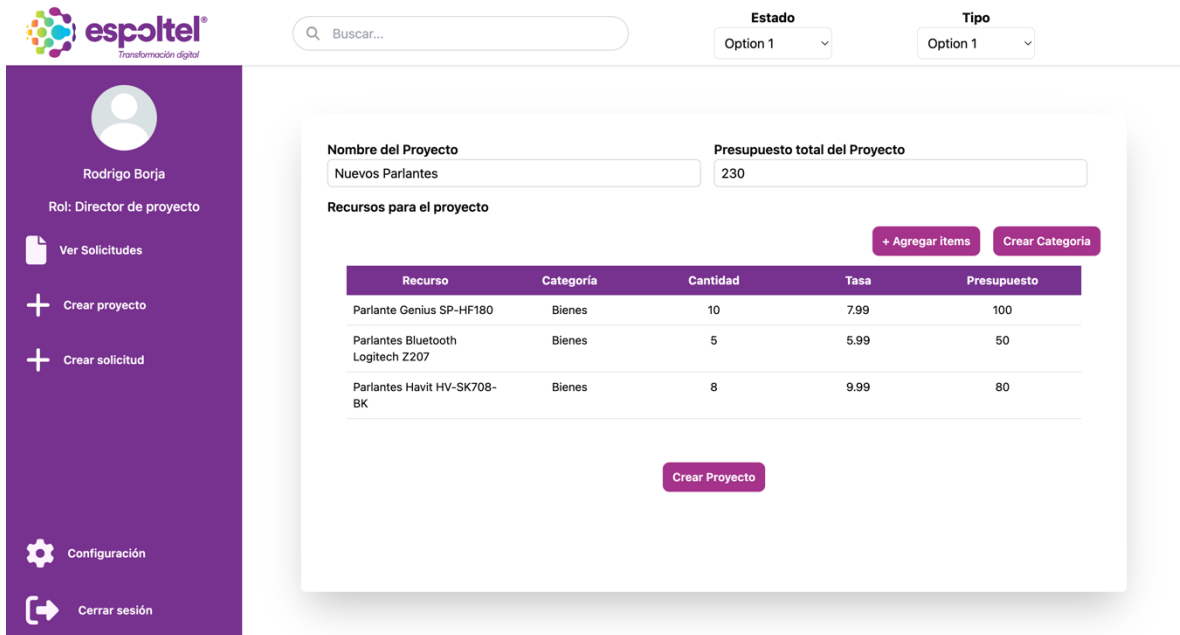
CREATE PROJECT

Click on Create Project and this will redirect to the following page.

Here you fill in the following data to create a project correctly: the name of the project and the project budget (which will be the sum of the budget of each resource entered in the system).

In addition, the user must enter resources to the project, the items that are requested for that project, each one has the following values to fill in: the name of the resource, choose a category, the units to request, the value and the budget for that item.

You can add a category by clicking on Create Category and this new value will be added to the list of categories for that project.
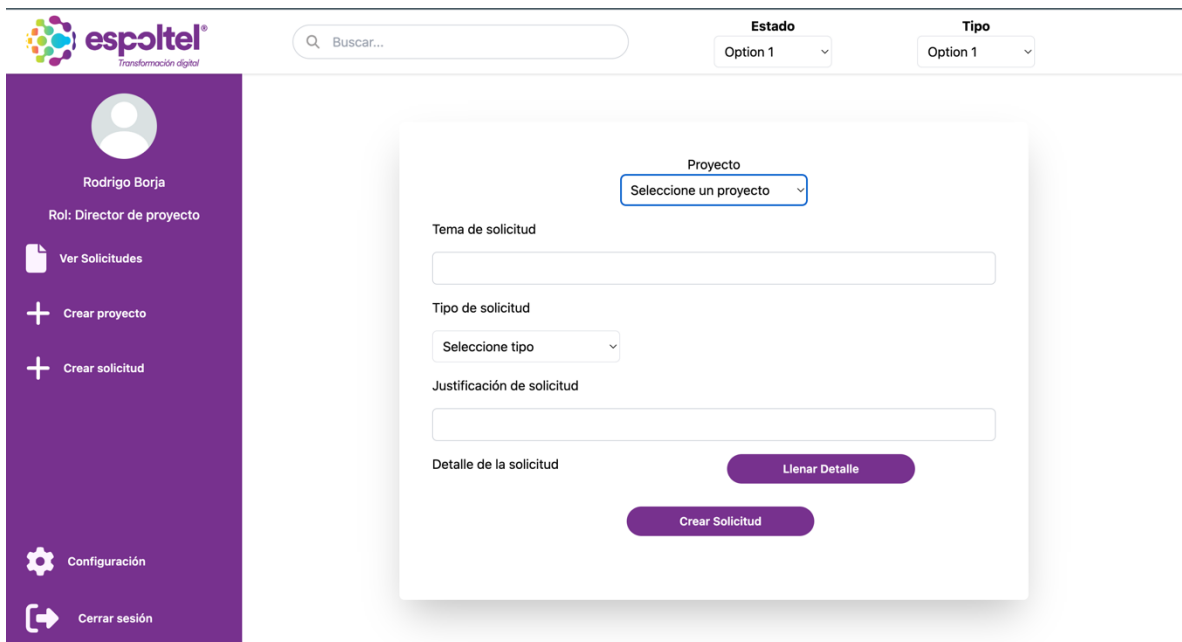

Once you have entered all the data, click on the create project button and the project will be saved.
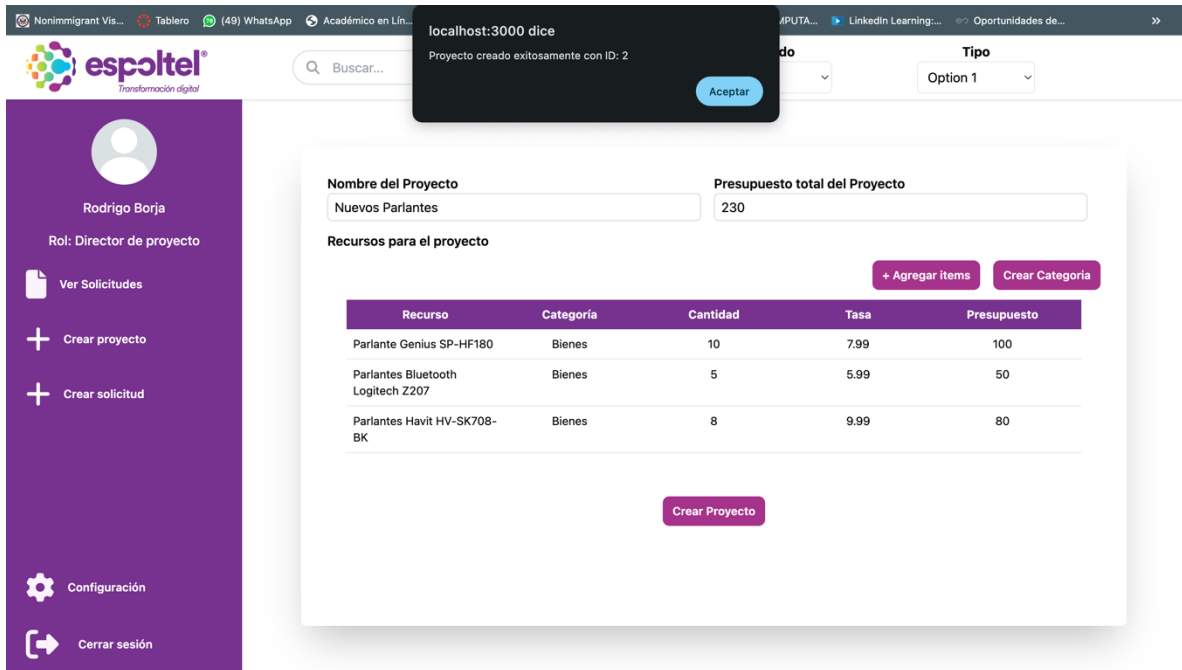
CREATE REQUISITION

Before starting, please note that to create a requisition you must have created at least one project.
Click on Create Requisition and this will redirect to the following page.

Here you fill in the following data: you must choose an existing project to which this requisition will belong, the subject of the application, choose the type of application and its justification.

In addition, you can fill in the details of the requisition, in this section you must choose the resources (previously declared in the project) that the user needs for this requisition.

Once you have entered all the data, click on the save button and the details will be saved. Then, click on create requisition and it will be saved.

VIEW REQUISITIONS

Click on view requisition and all requisitions that the logged in project manager has created will be displayed on the screen.

Procurement

LOGIN

The user of the procurement department can log in with their respective credentials. The user of the procurement department will be shown the options: View Requisitions and Create Quotation.
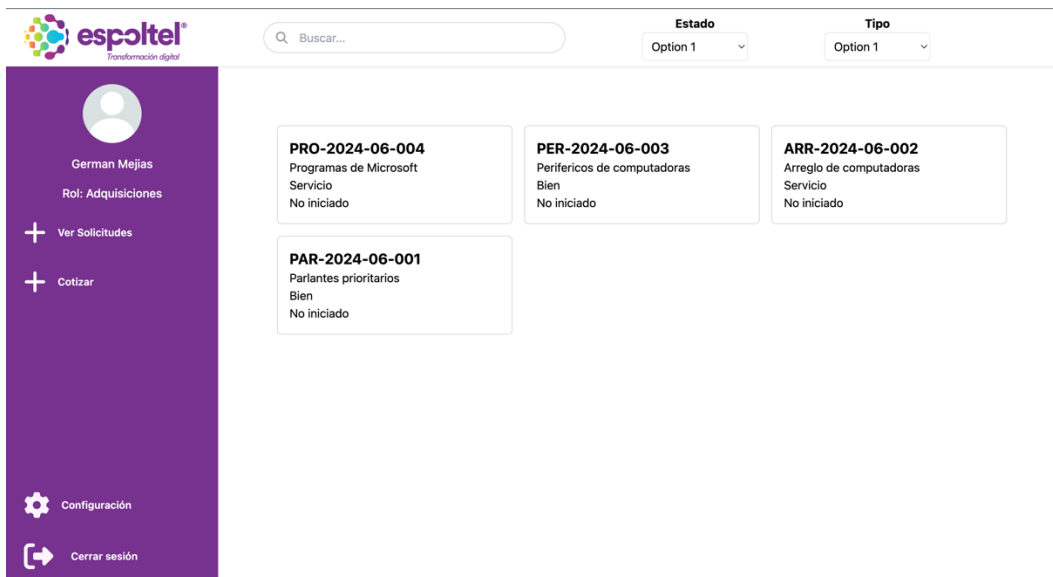
VIEW REQUISITIONS

Click on view requisitions and the user will then be redirected to the page, where, unlike the Project Manager, it will be possible to view all purchase requisitions that are registered in the system.

CREATE QUOTATION

Click on create quotation and a screen will appear where the following data must be filled in: Supplier, Quotation Number, Amount, Quotation Link and Preform Date.

Once the data is filled in, click on the save button and the quotation will be registered.