USER MANUAL

SOLICITEL APPLICATION

Content table

1. INTRODUCTION

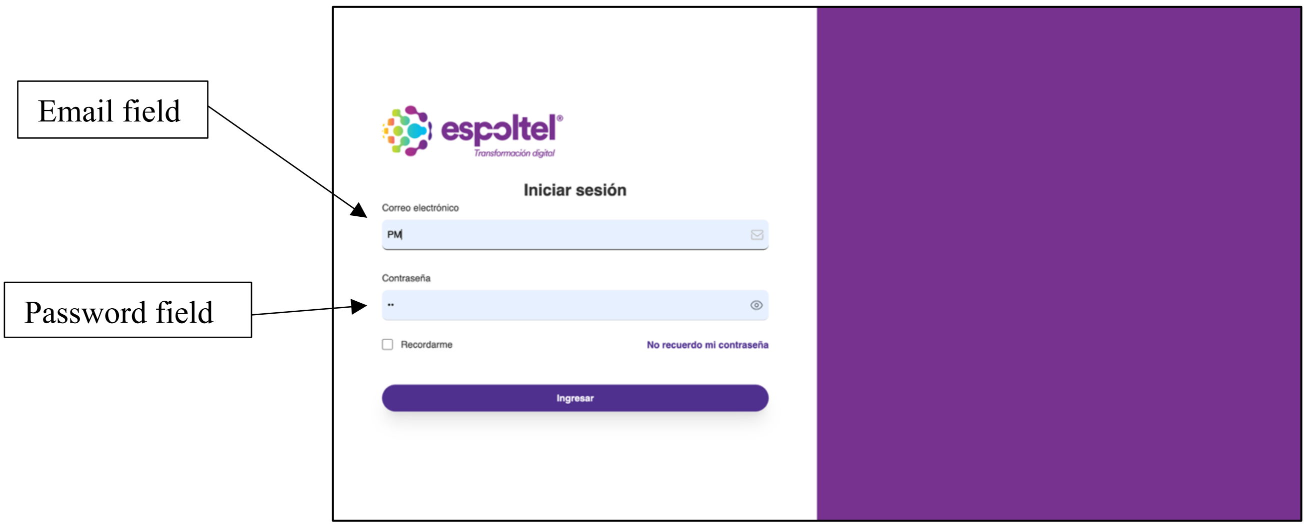
This document provides a user manual for Solicitel Application. To provide a comprehensive guide for each user view and its functionality. It is important that users have a brief understanding about the project.

2. APPLICATION

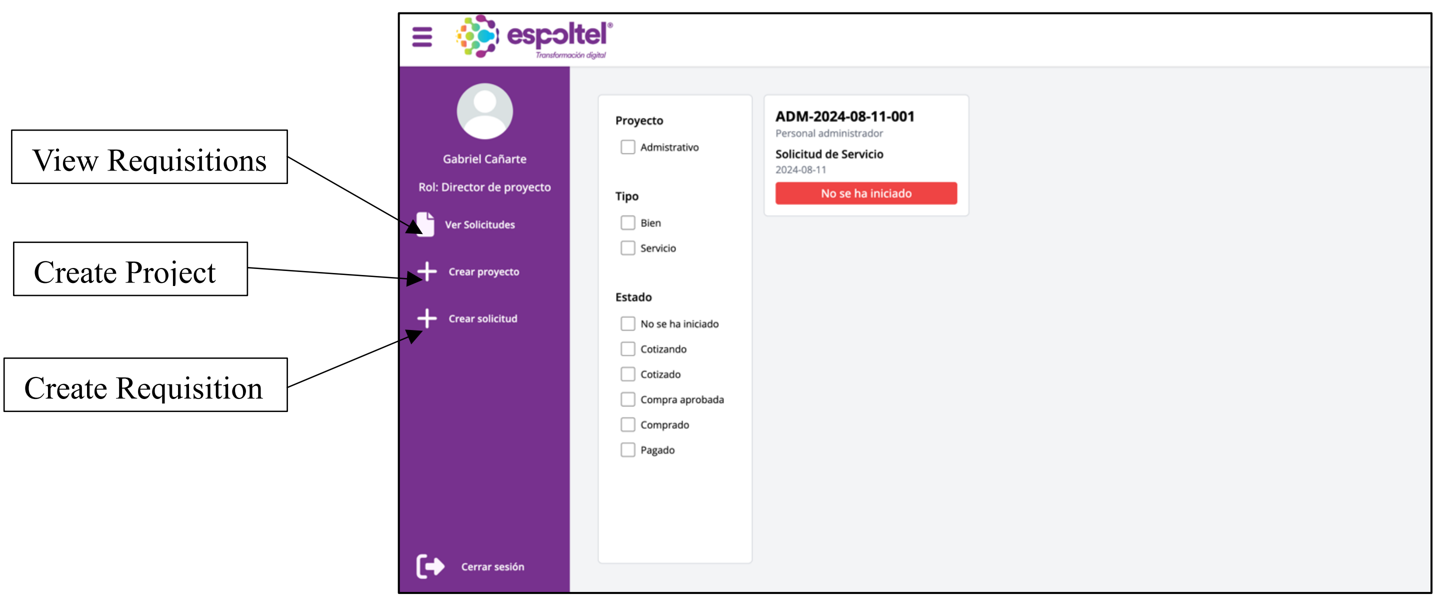
Project Manager

LOGIN

1. Open your web browser and go to the following URL: https://espoltel-frontend.vercel.app/login.
2. The project manager must enter his e-mail address in the “E-mail” field.
3. Enter the password in the “Password” field and click on “Enter”.

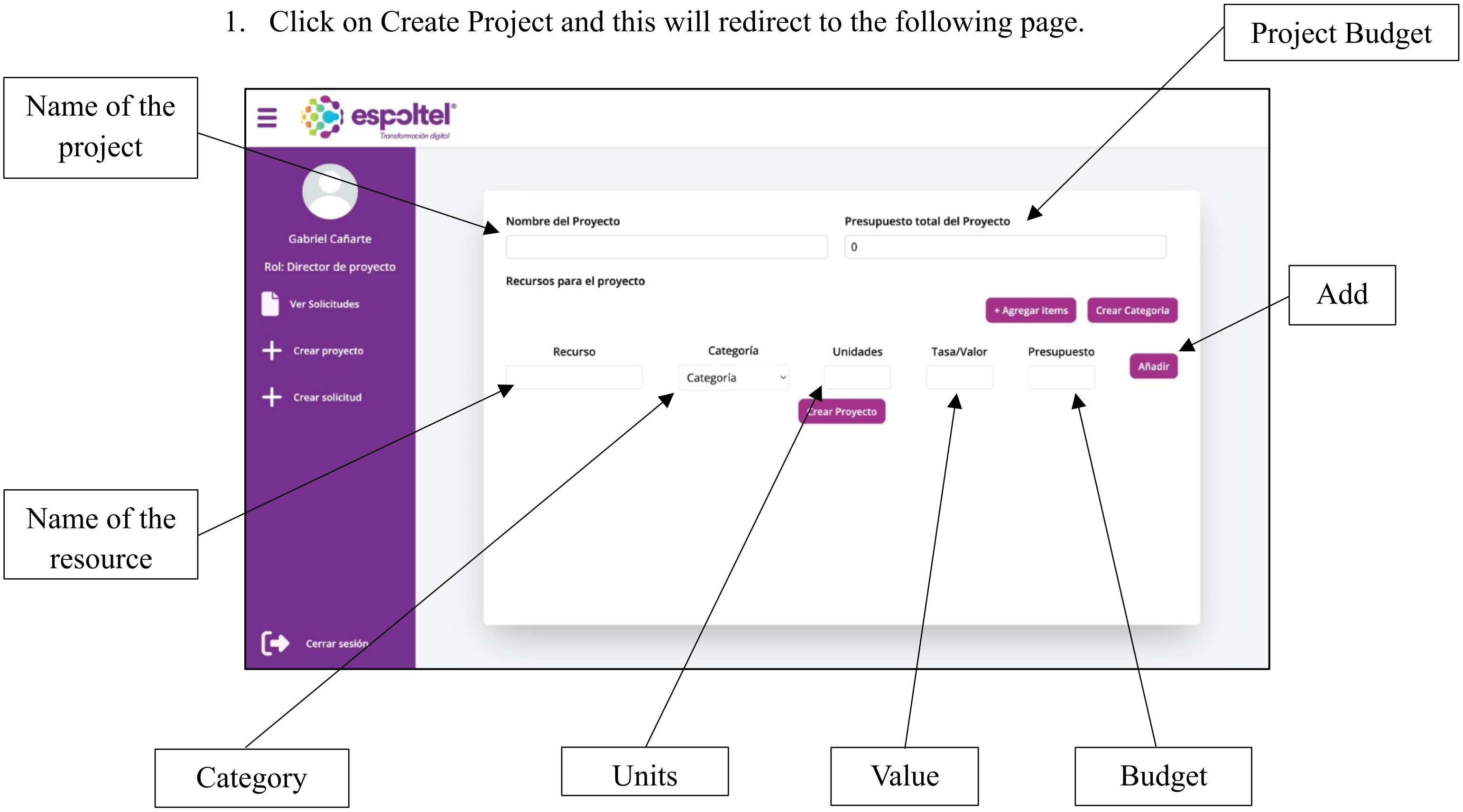


4. Afterwards, the user will be redirected to the main page where the purchase requisitions can be viewed. The project manager will be shown the options: View Requisitions, Create Project and Create Requisition.

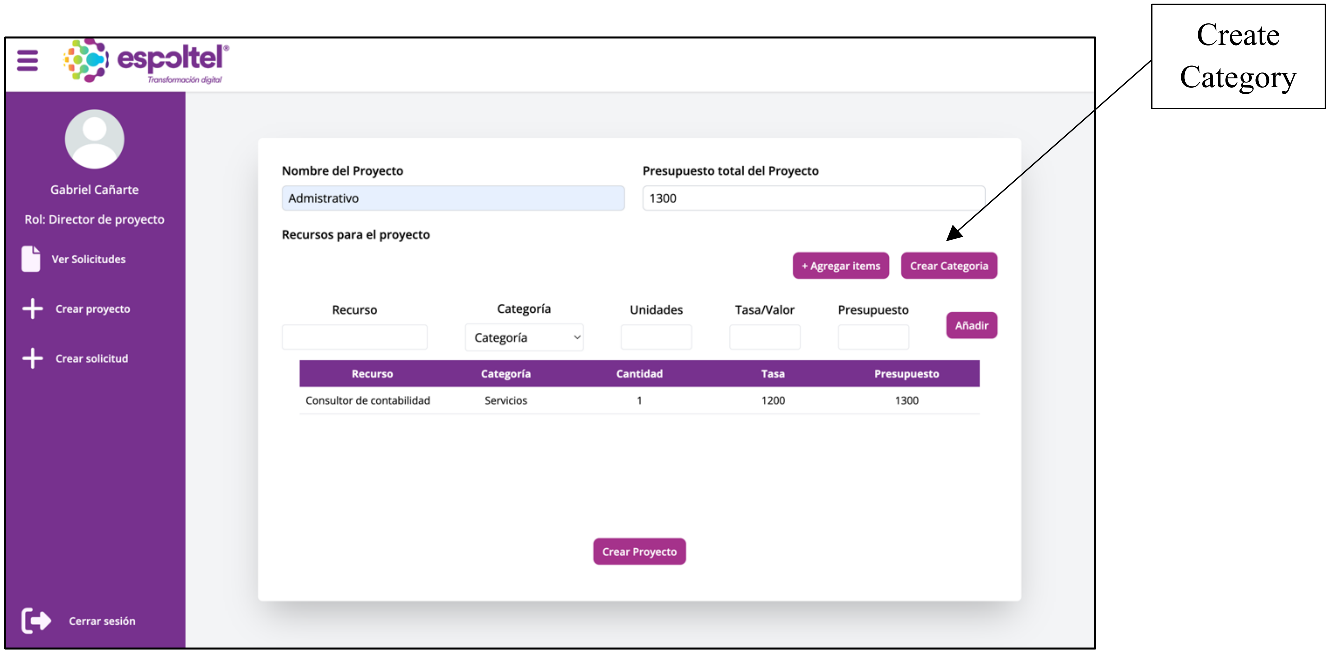


CREATE PROJECT

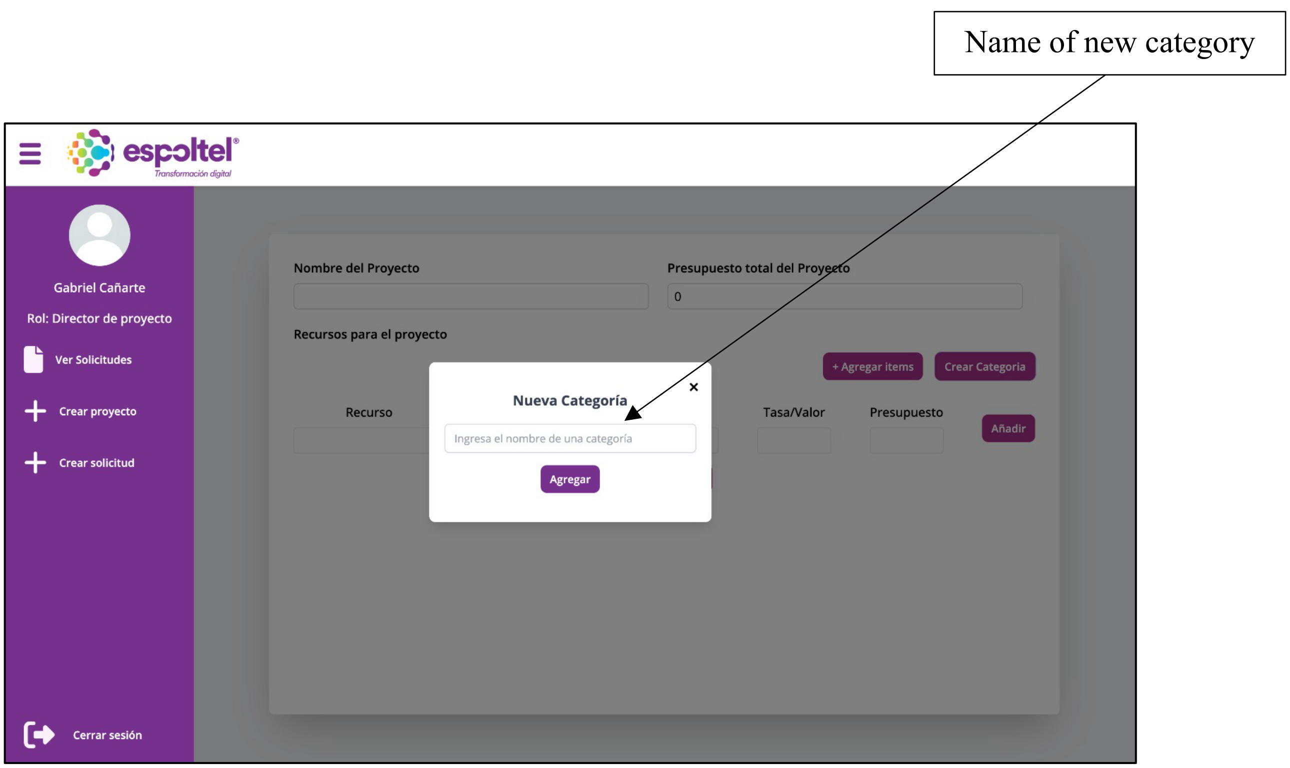
1. Click on Create Project and this will redirect to the following page.



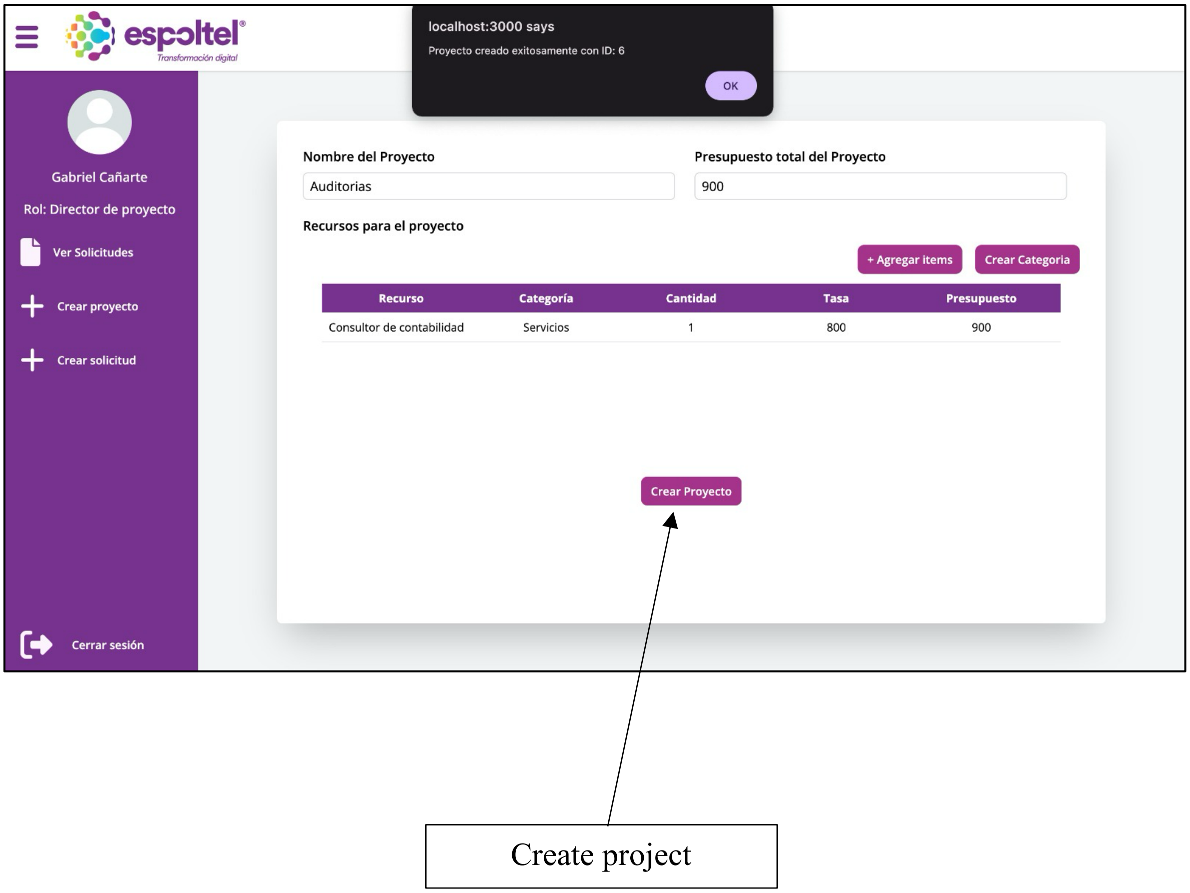
2. Enter the Name of the Project. The Project Budget will be the sum of all resources you will add to this project.
3. To add resources to your project, fill in the Name of the Resource, select the appropriate Category, specify the Units (quantity), the Value (unit price), and the Budget (total cost for that resource). After entering each resource, click on "Add".



4. If a necessary category does not exist, click on "Create Category", enter the Name of the New Category, and confirm by clicking "Add". The new category will then be available for use.



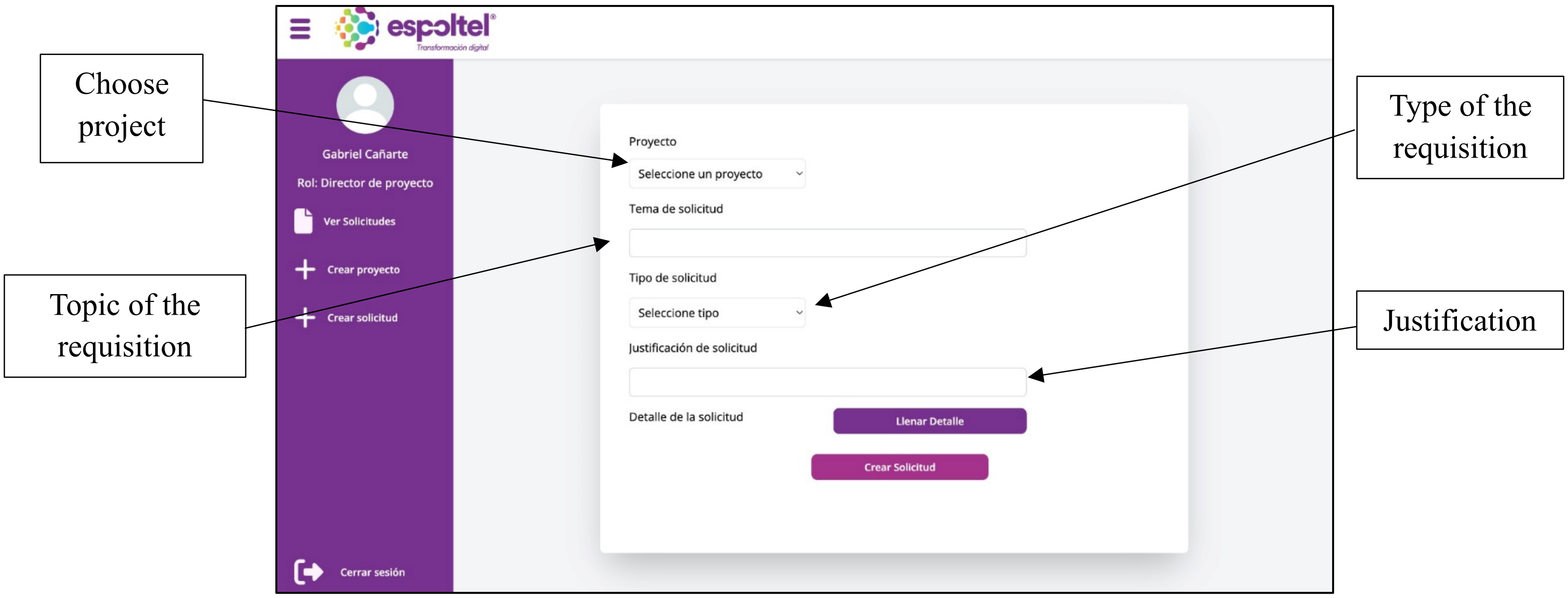
5. Once all resources have been added, click on "Create Project". You will receive a success alert confirming that the project has been created correctly.



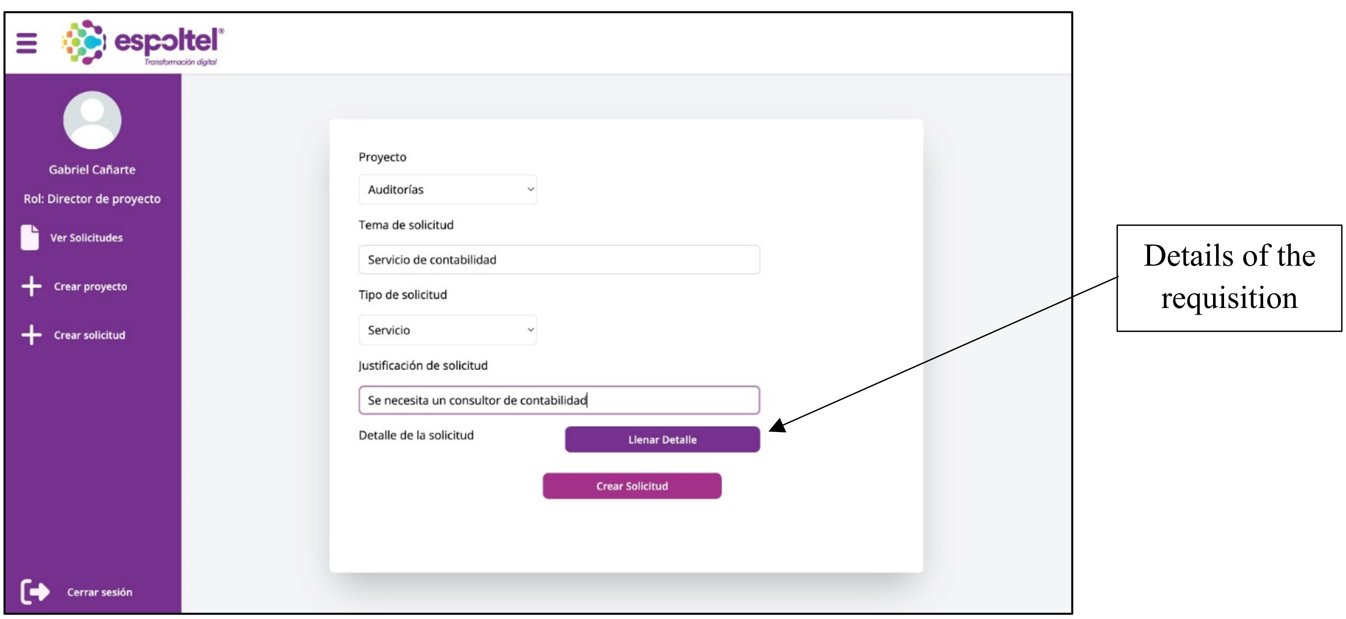
CREATE REQUISITION

Before starting, please note that to create a requisition you must have created at least one project.

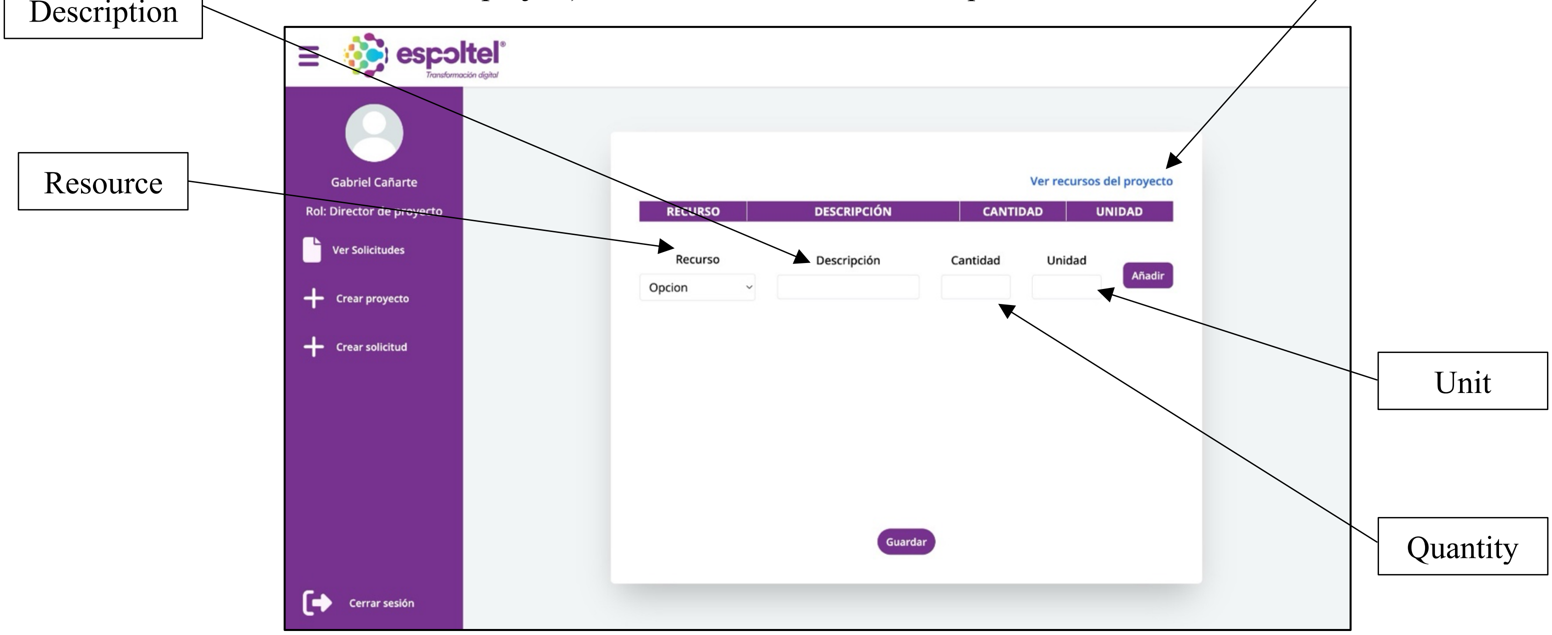
1. Click on Create Requisition and this will redirect to the following page.



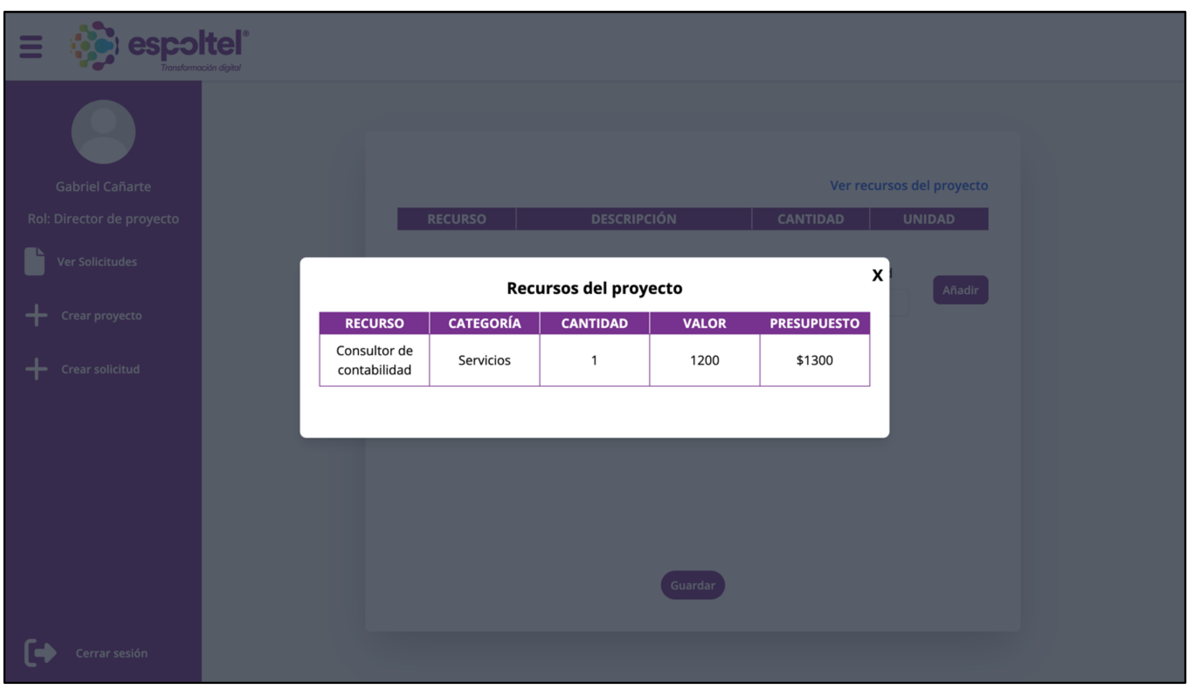
2. Choose an existing project to which this requisition will belong. Then, fill in the Topic of the Requisition, select the Type of Requisition, and provide a Justification.



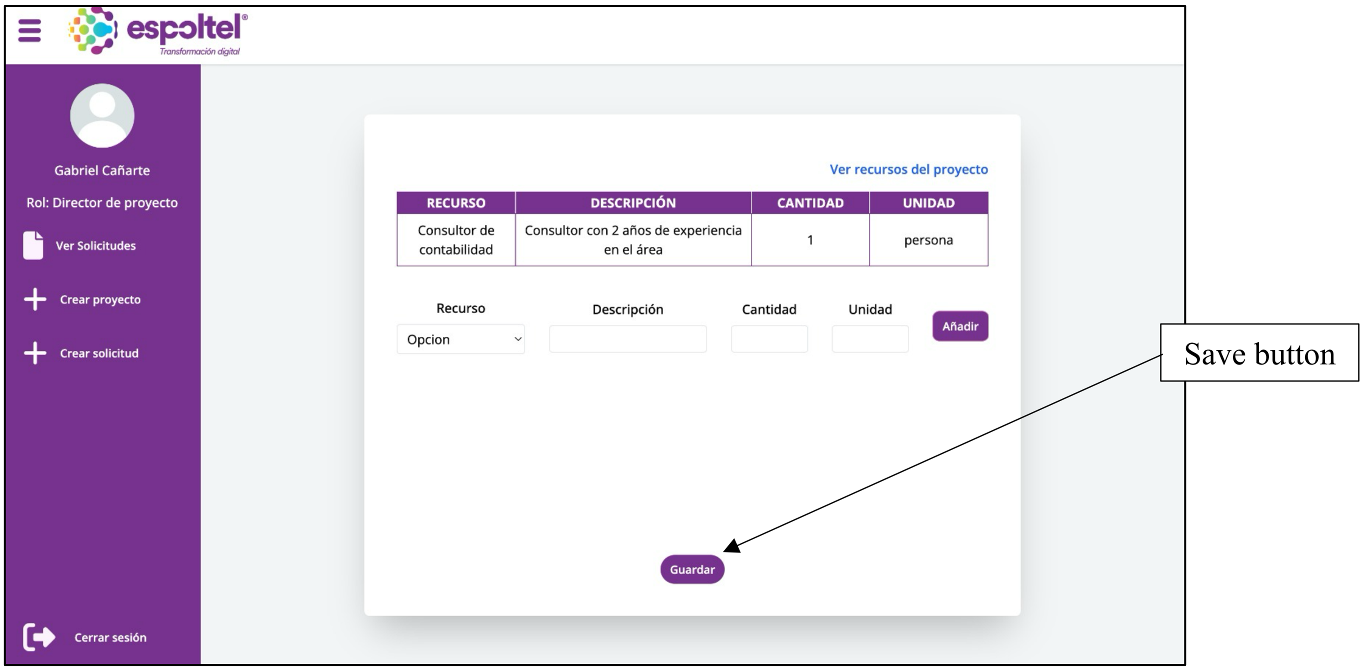
3. In the "Details of the Requisition" section, choose the resources (previously declared in the project) that the user needs for this requisition.



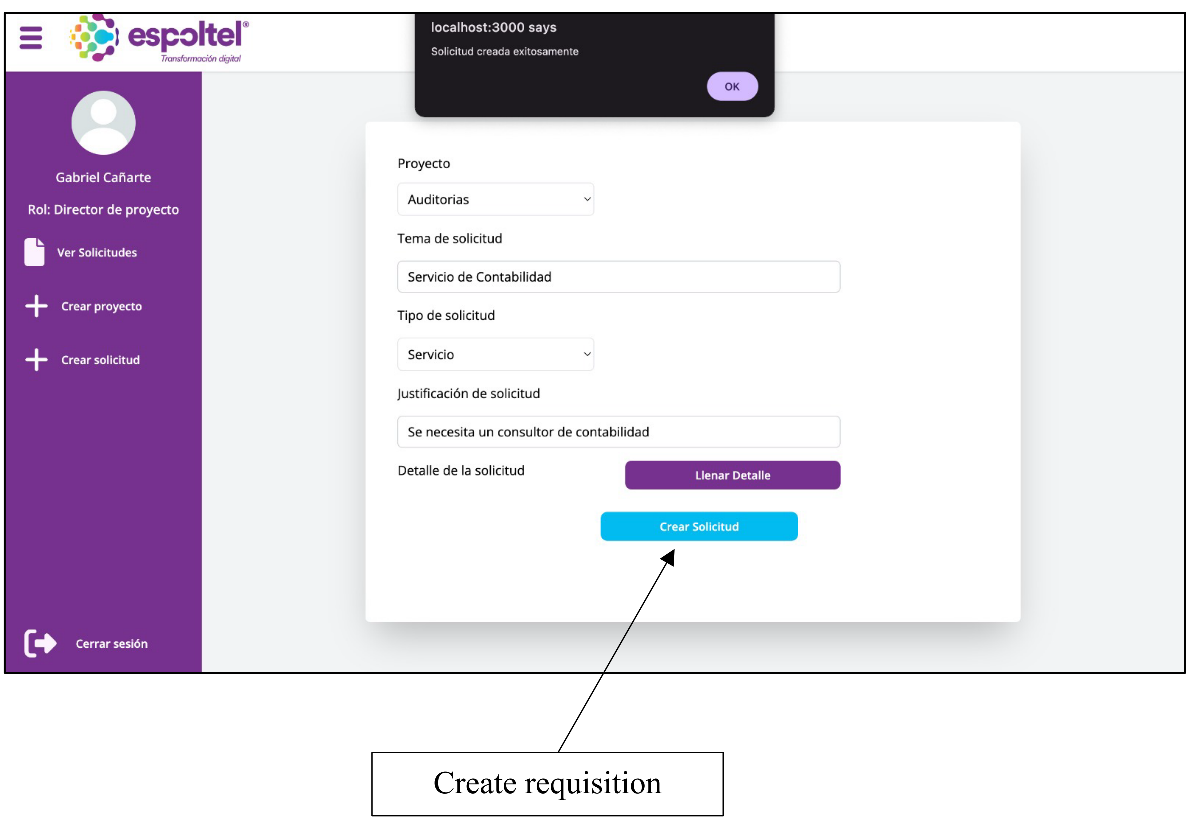
4. Additionally, the user can view the project resources by clicking on the Project Resources button.



5. Fill in the fields for Resource, Description, Quantity, and Unit. Ensure all required fields are completed.



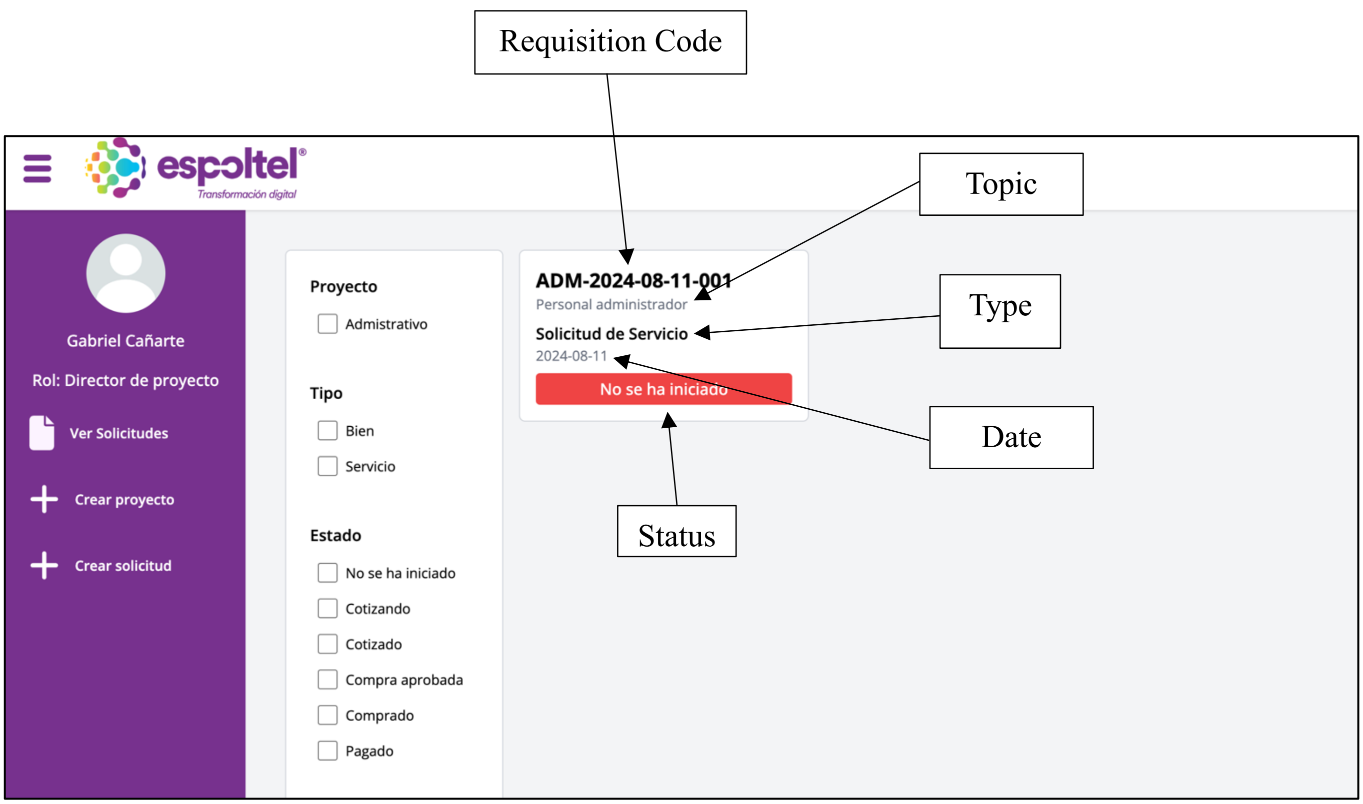
6. Once you have entered all the data, click on the save button and the details will be saved. Then, click on create requisition and it will be saved.



VIEW REQUISITIONS

1. In the side menu, click on “View Applications”.
2. All requests that have been created by the logged-in project manager will be displayed on the main screen.
   Each requisition will be presented on a card containing the following details:
   - Requisition Code
   - Topic
   - Type
   - Date
   - Status

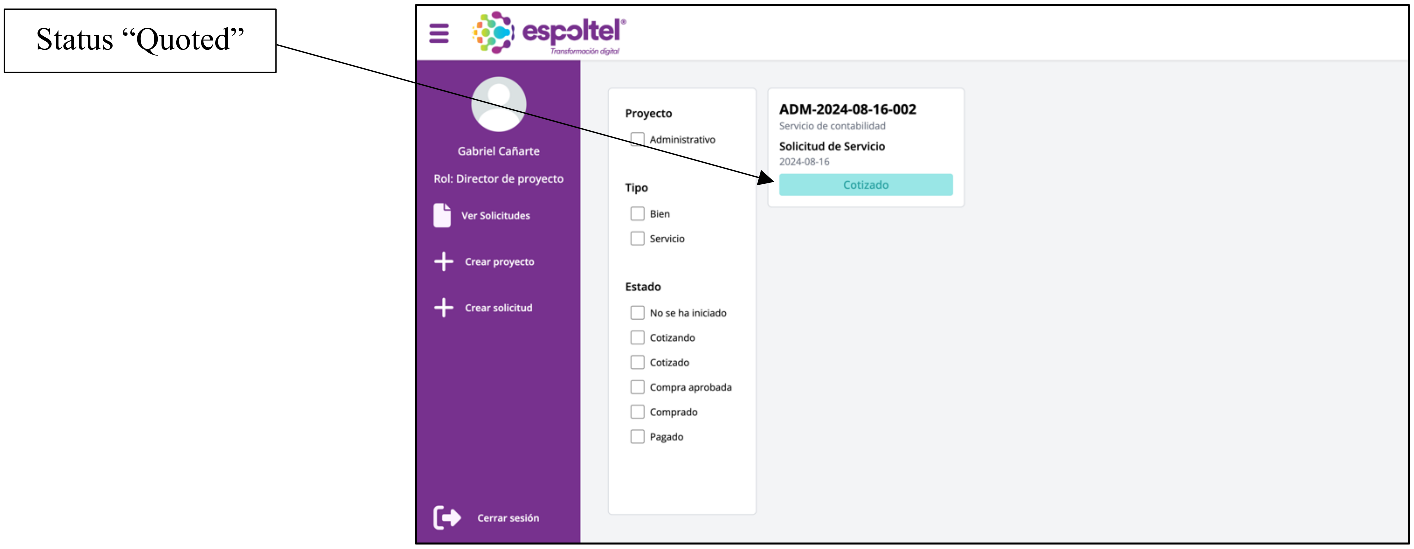
3. Use the filters at the top of the screen to filter requests by Project, State and Type.



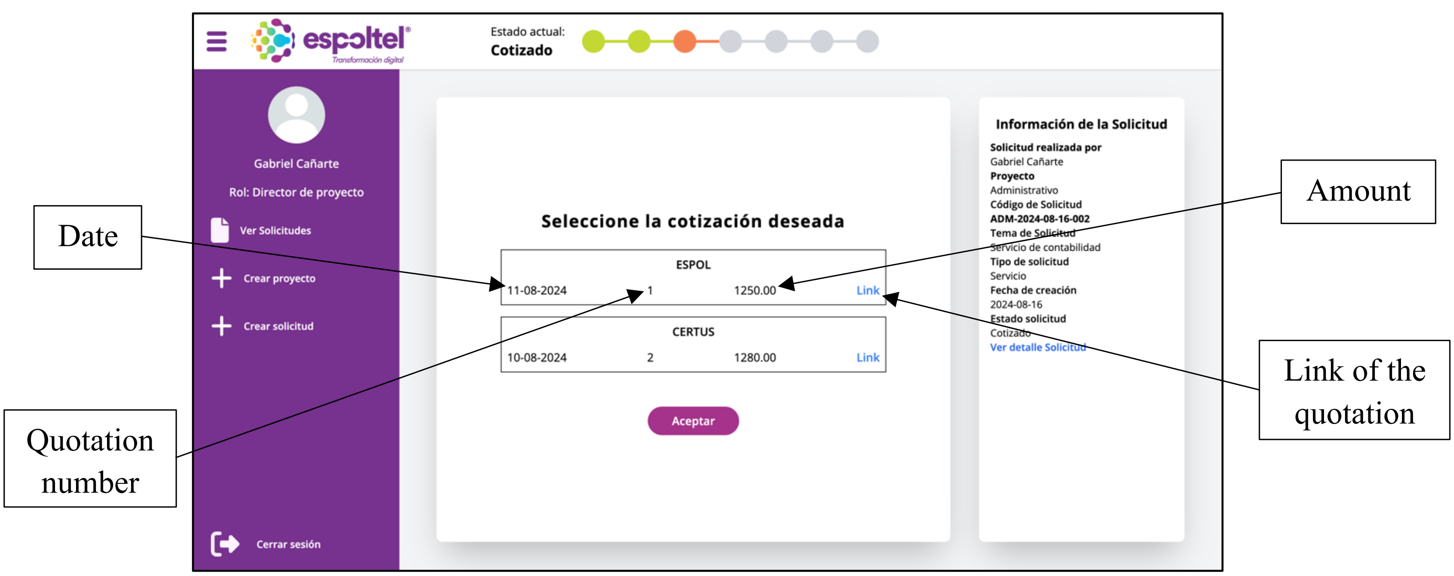
CHOOSE QUOTATION

Please note that, to select a quotation, it is necessary that the procurement team has submitted the quotations, and the status of the requisition is set to Quoted.

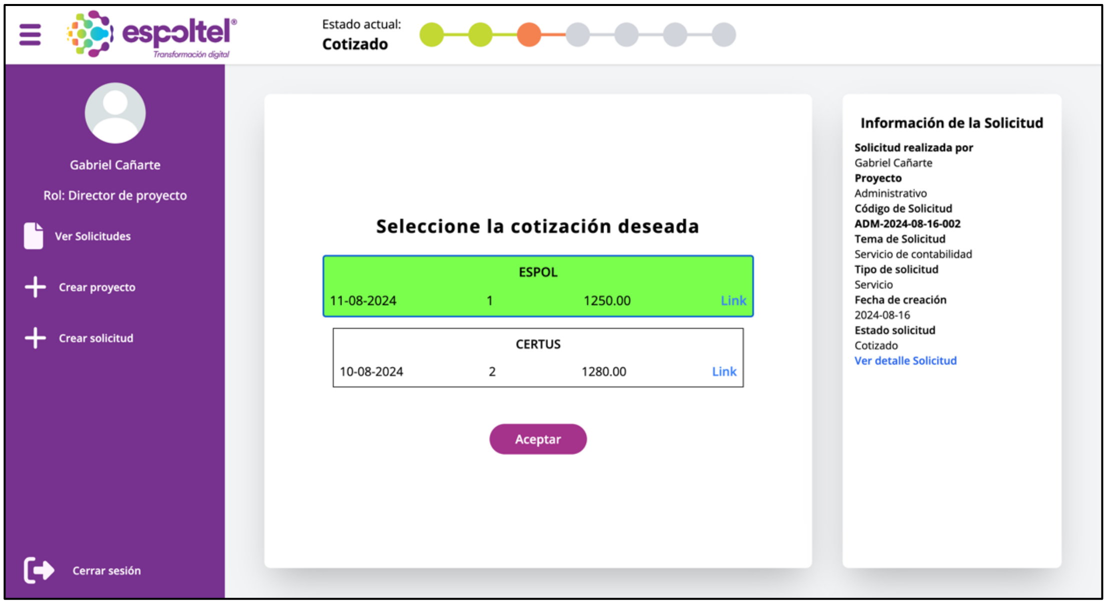
1. Select a requisition that has the status "Quoted". This indicates that the procurement team has already sent the quotations for that requisition.



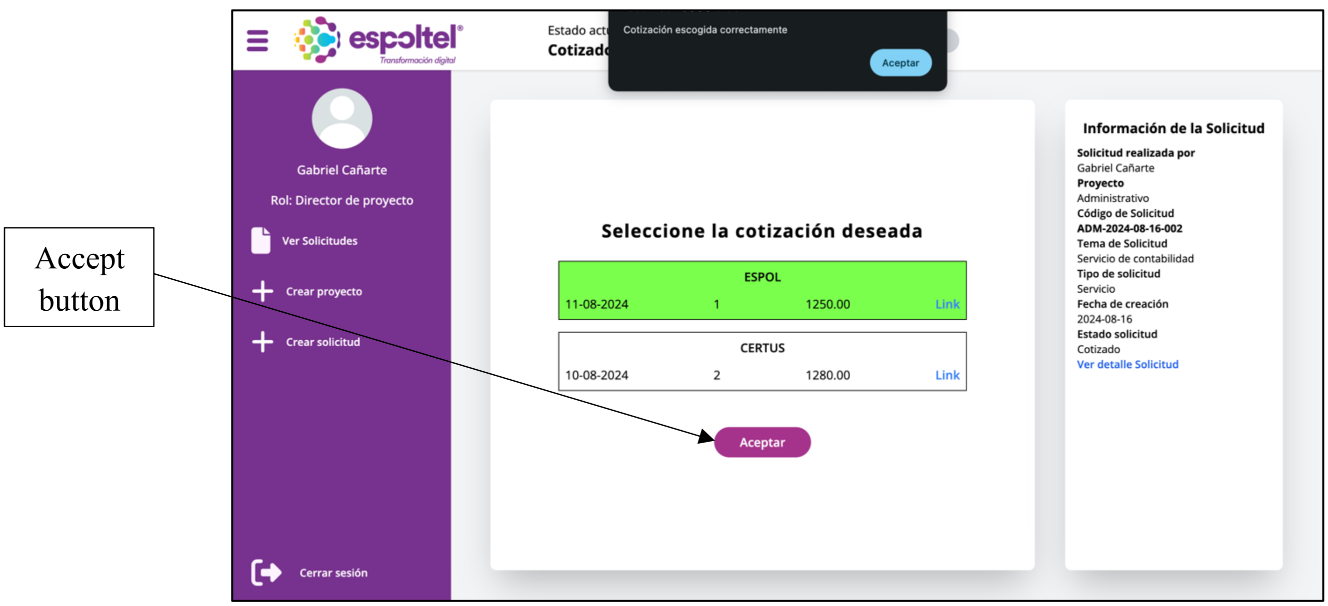
2. The system will display all quotations assigned for that requisition. Each quotation will display detailed information such as date, quotation number, amount, and a link to view the quotation.



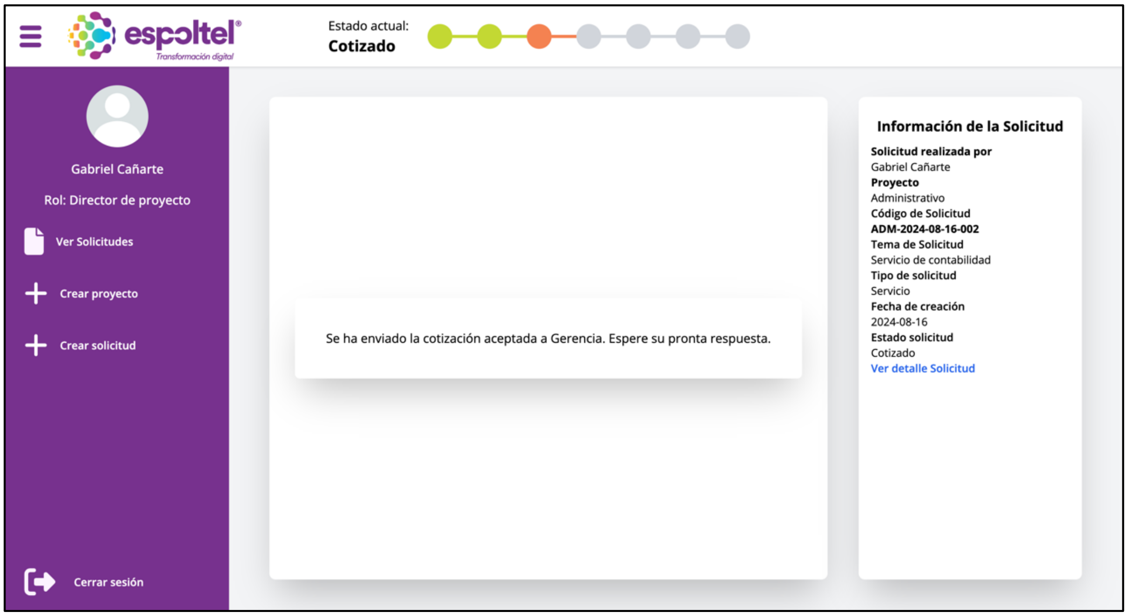
3. Review the list of quotes and choose the one that best suits your needs. Click on the quotation to select it.



4. After selecting the desired quotation, click the “Accept” button.



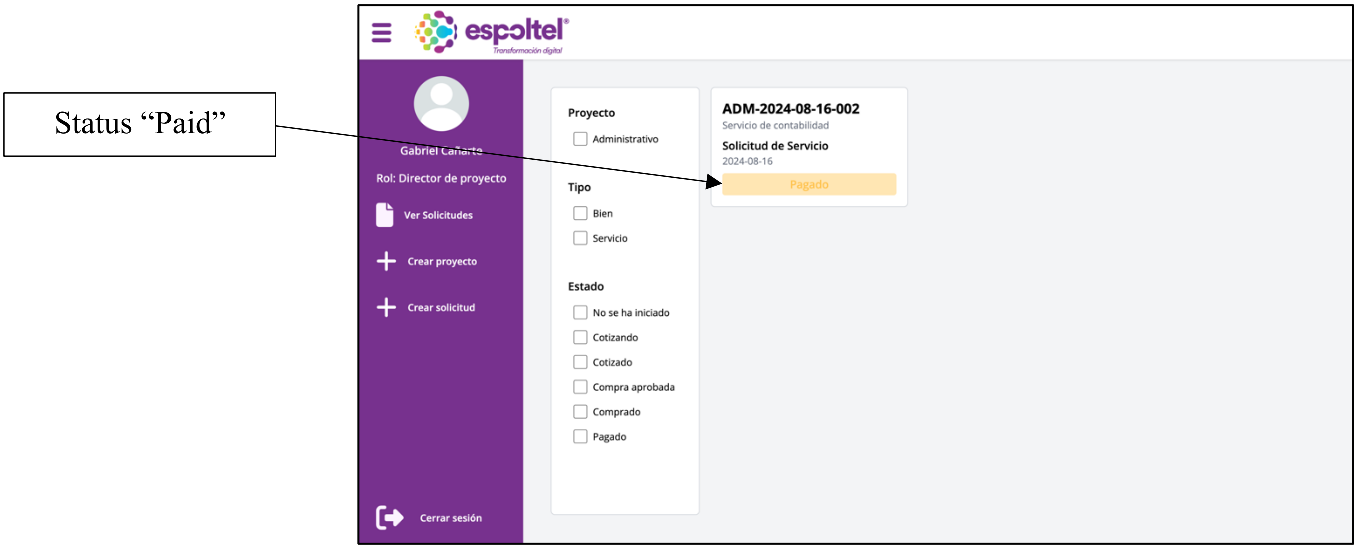
5. The selected quotation will be sent to the Management team for final approval. The management team will decide whether to accept or reject the selected quotation.



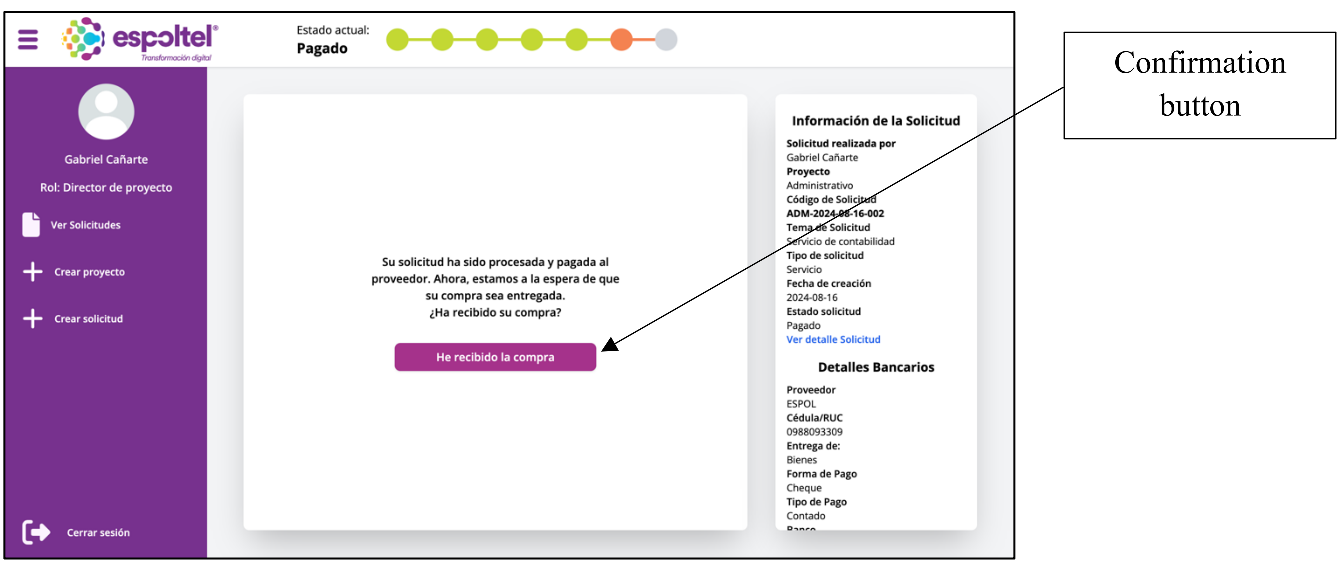
CONFIRM PURCHASE

Please note that, to confirm the purchase, the accounting team must have updated the invoice status of that requisition to Processed OK.

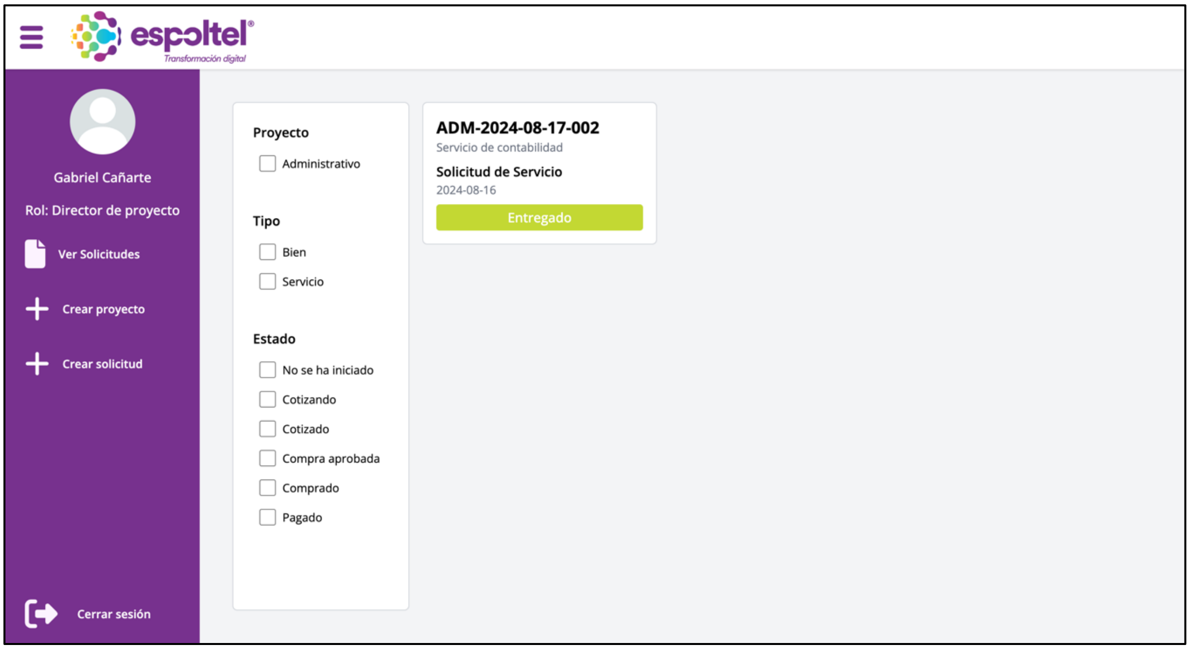
1. Begin by selecting a requisition that is marked with the status “Paid”. This status indicates that the invoice has been fully processed and paid.



2. After selecting the requisition, a new screen will appear confirming that the requisition has been paid. Below this confirmation, you will find a button labeled " I have received my purchase".



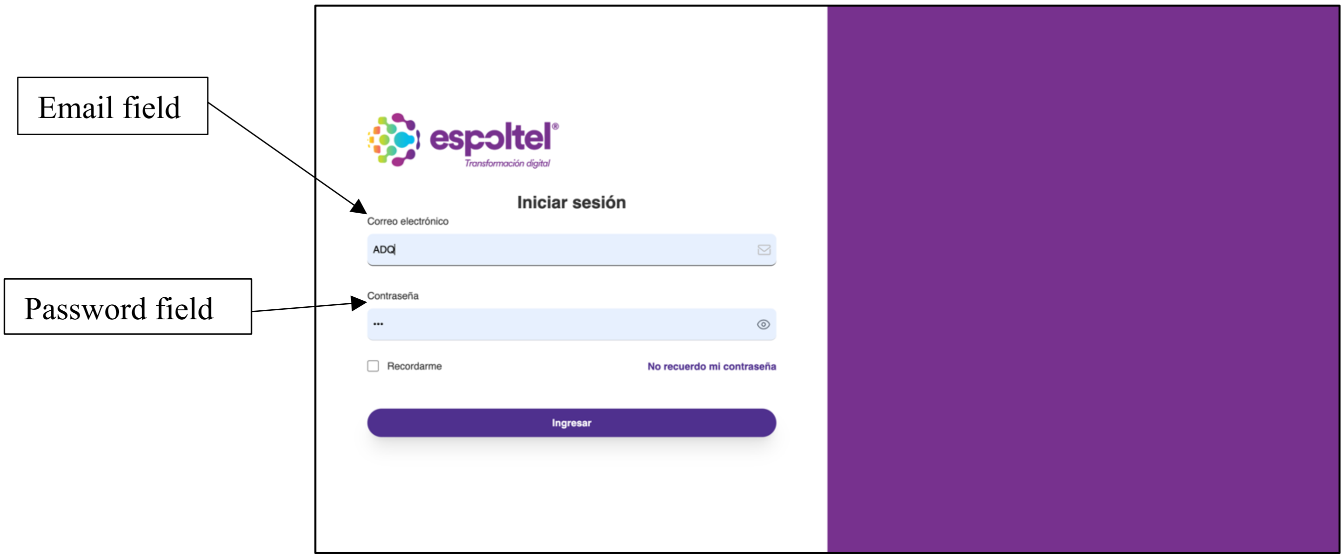
3. Click the " I have received my purchase" button. This action will update the status of the requisition to "Delivered", indicating that the purchase has been received. Completing the requisition process.



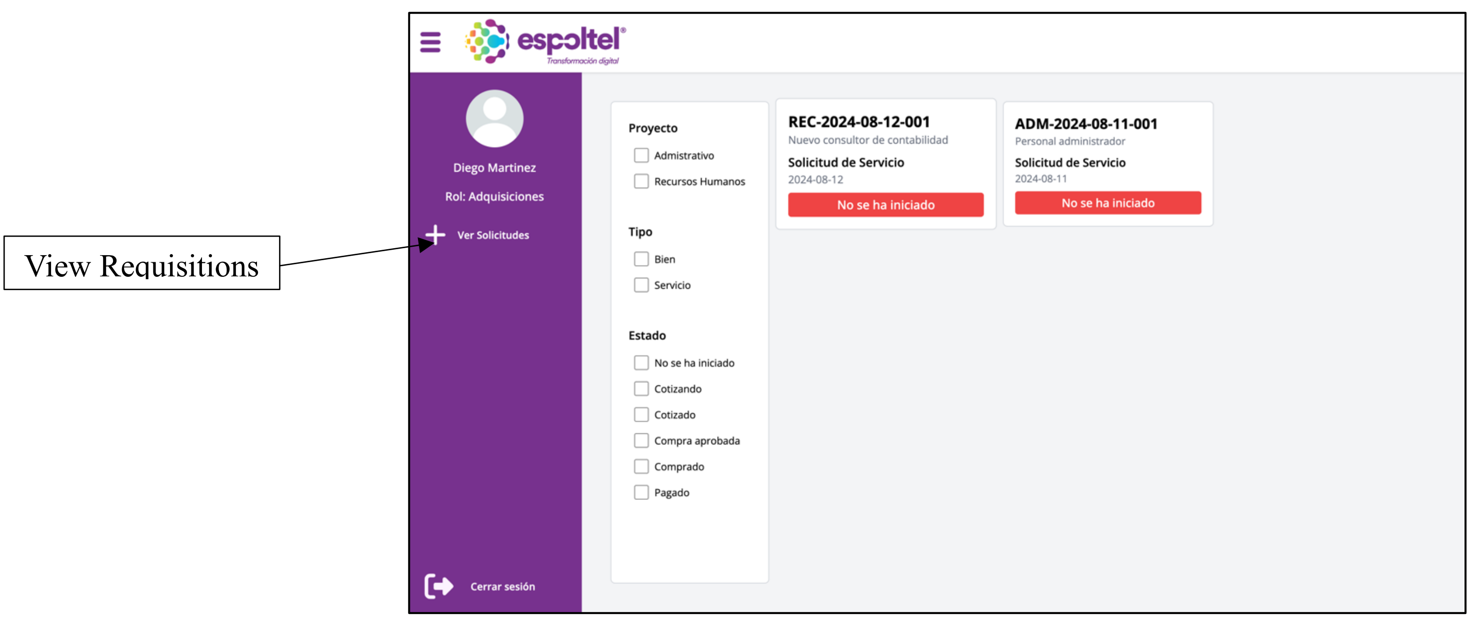
Procurement

LOGIN

1. Open your web browser and go to the following URL: https://espoltel-frontend.vercel.app/login.
2. The procurement member must enter his e-mail address in the “E-mail” field.
3. Enter the password in the “Password” field and click on “Enter”.

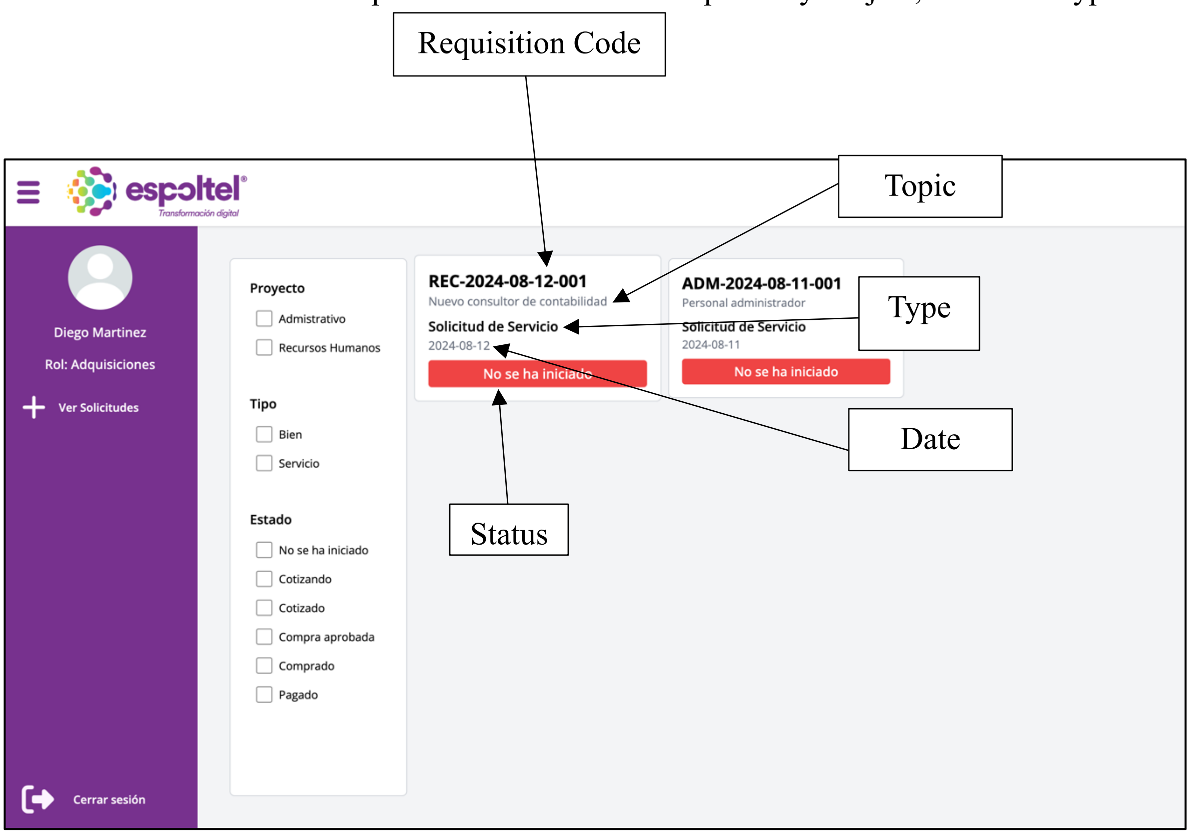


4. Afterwards, the user will be redirected to the main page where the requisitions can be viewed. The procurement member will be shown the option: View Requisitions.



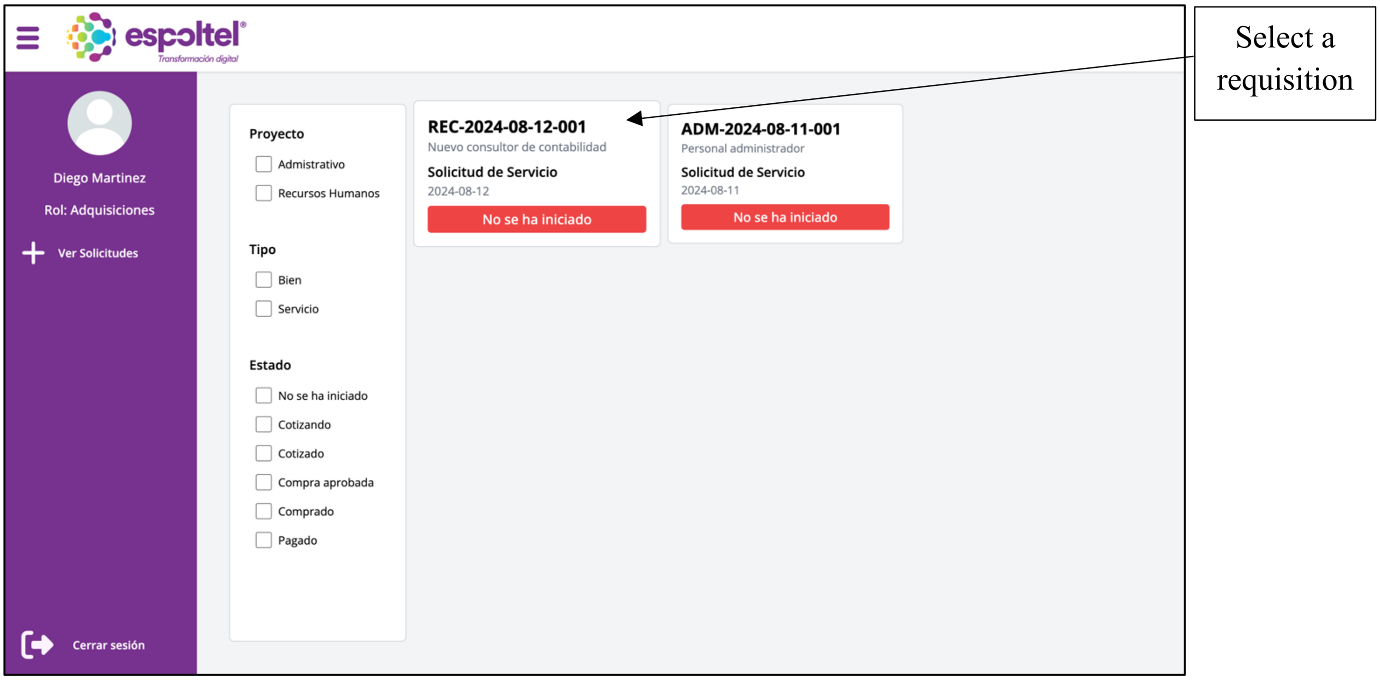
VIEW REQUISITIONS

1. In the side menu, click on "View Requisitions".
2. Unlike the Project Manager, it will be possible to view all requisitions that are registered in the system.
   Each requisition will be presented on a card containing the following details:
   - Requisition Code
   - Topic
   - Type
   - Date
   - Status
3. Use the filters at the top of the screen to filter requests by Project, State and Type

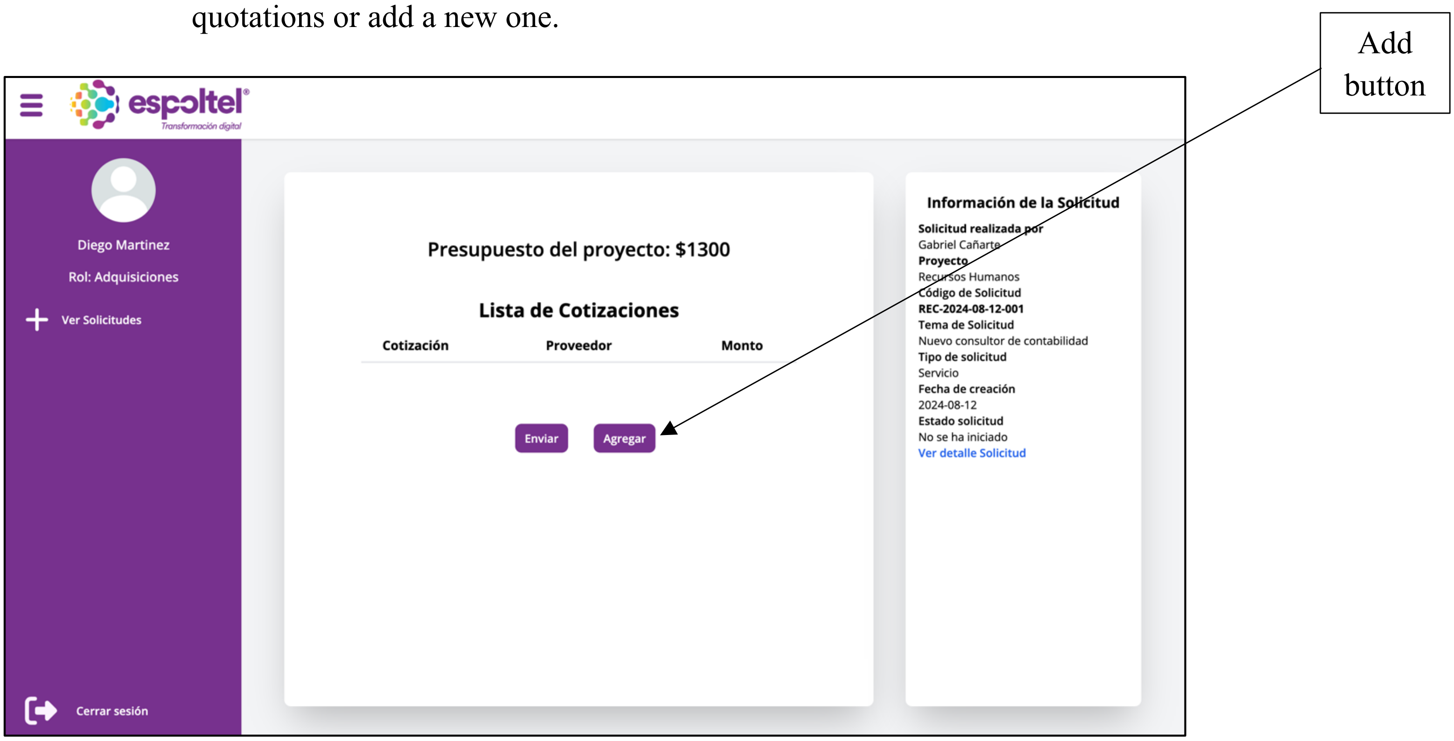


CREATE QUOTATION

1. Begin by navigating to the "View Requisitions" section and select an existing requisition from the list displayed.

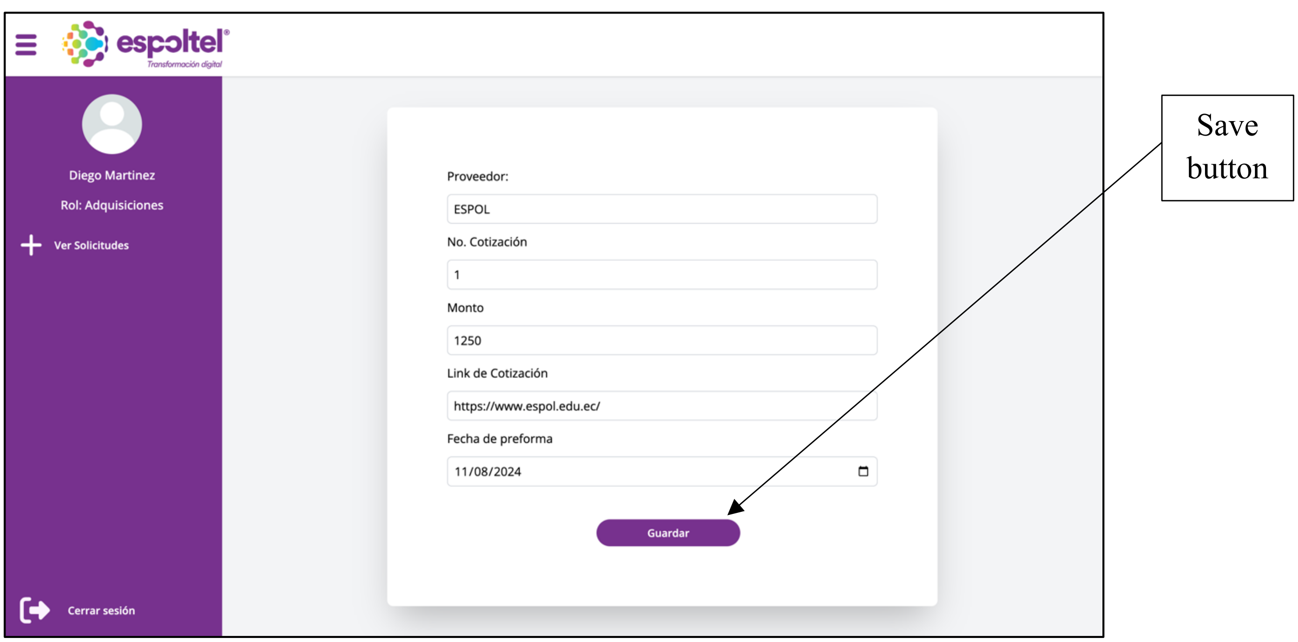


2. Once you have selected the requisition, the system will show you the list of quotations associated to the selected requisition. Here you can view the existing quotations or add a new one.

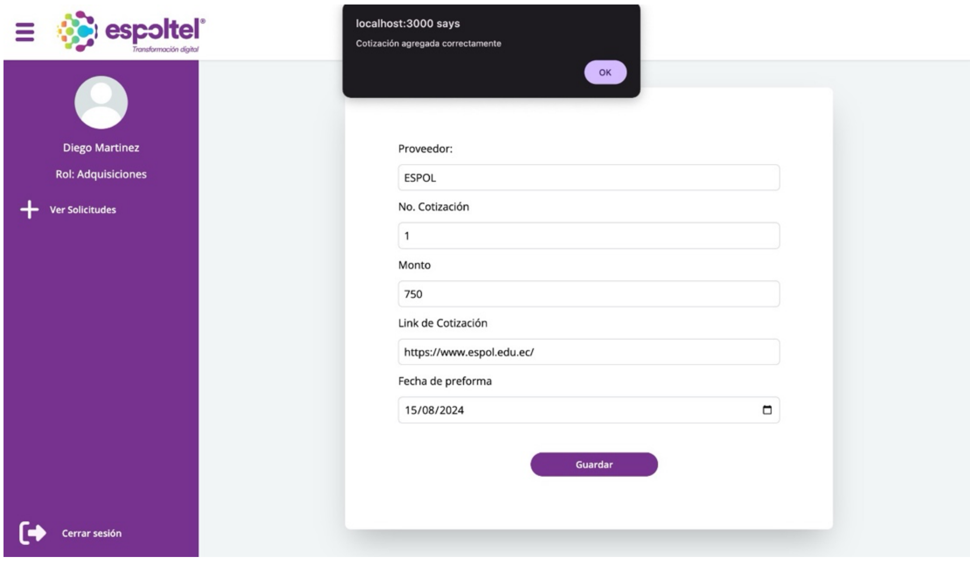


3. Click on the “Add” button to create a new quotation related to the selected requisition.

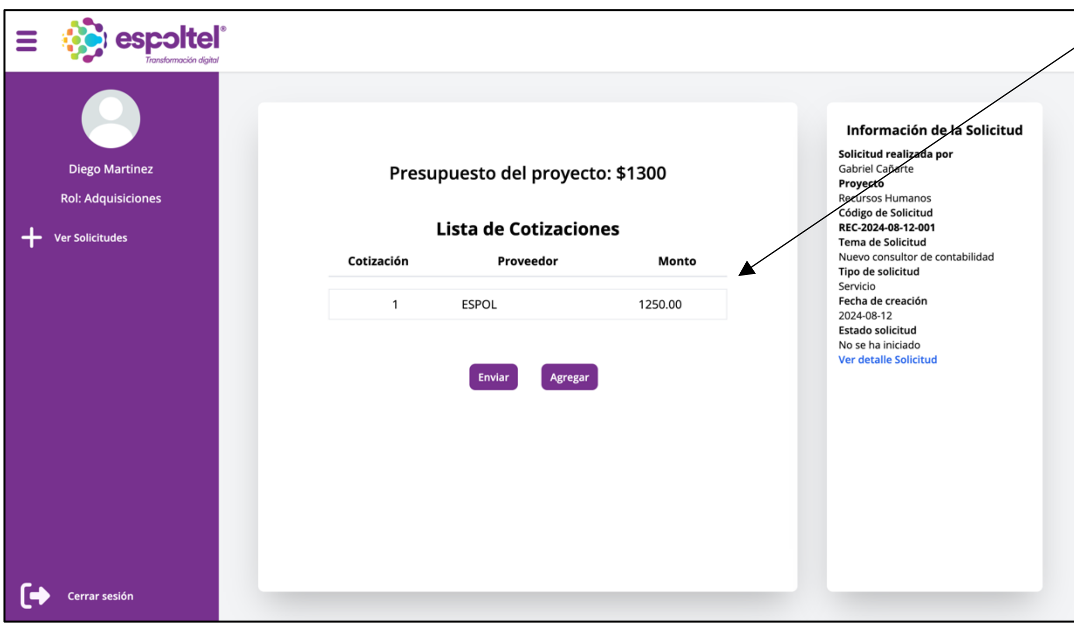
4. A form will appear where you need to input the following details:
   - **Supplier**: Enter the name of the supplier.
   - **Quotation Number**: Provide the unique quotation number.
   - **Amount**: Specify the total amount for the quotation.
   - **Quotation Link**: Input the URL where the quotation can be viewed.
   - **Preform Date**: Select the preform date using the date picker.



5. Complete all required details and click on the "Save" button. This will register the quotation in the system associated with the selected requisition.



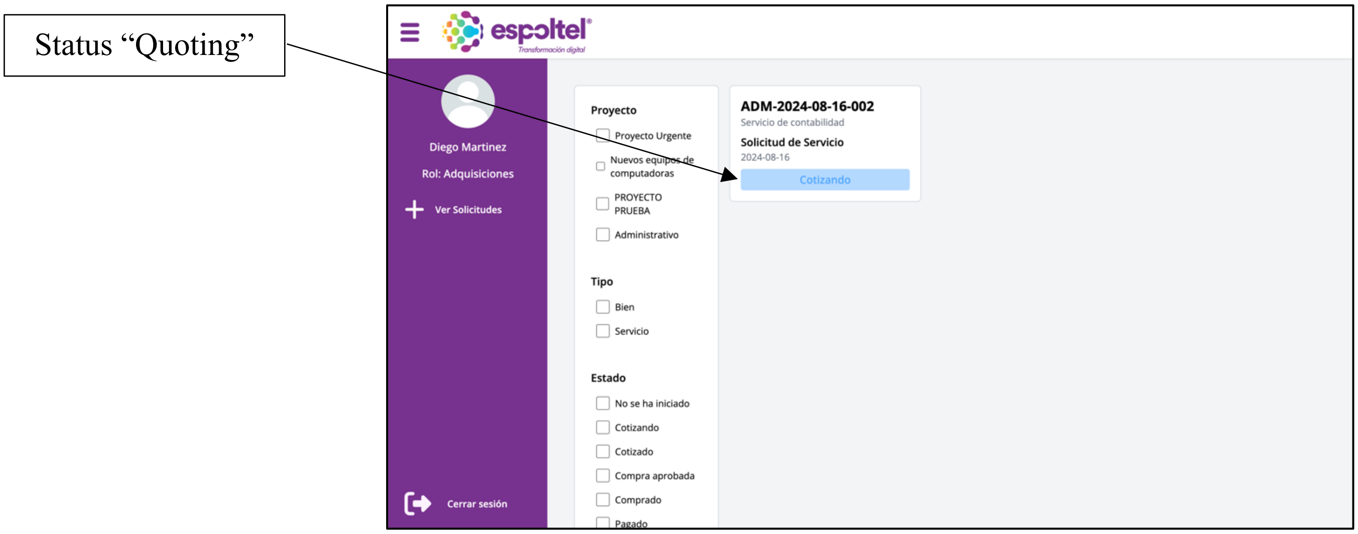
6. After saving the quotation, the list of quotations for the selected application will be displayed and updated.



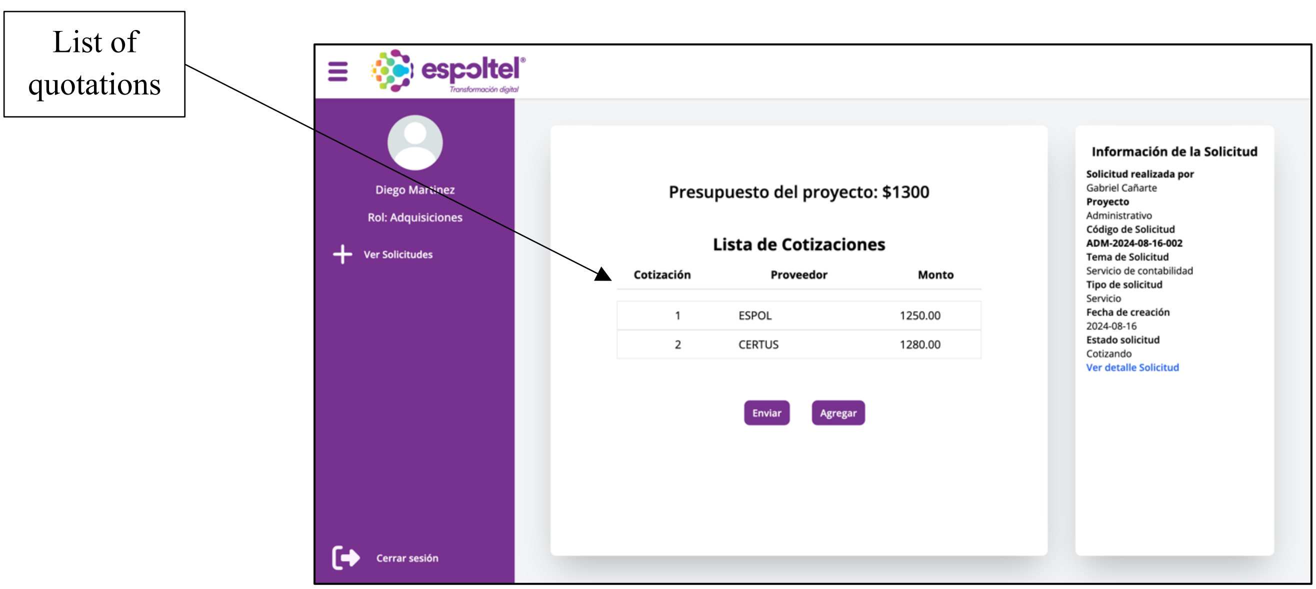
SEND QUOTATIONS

Please note that, to send quotations, at least one quotation must have been created.

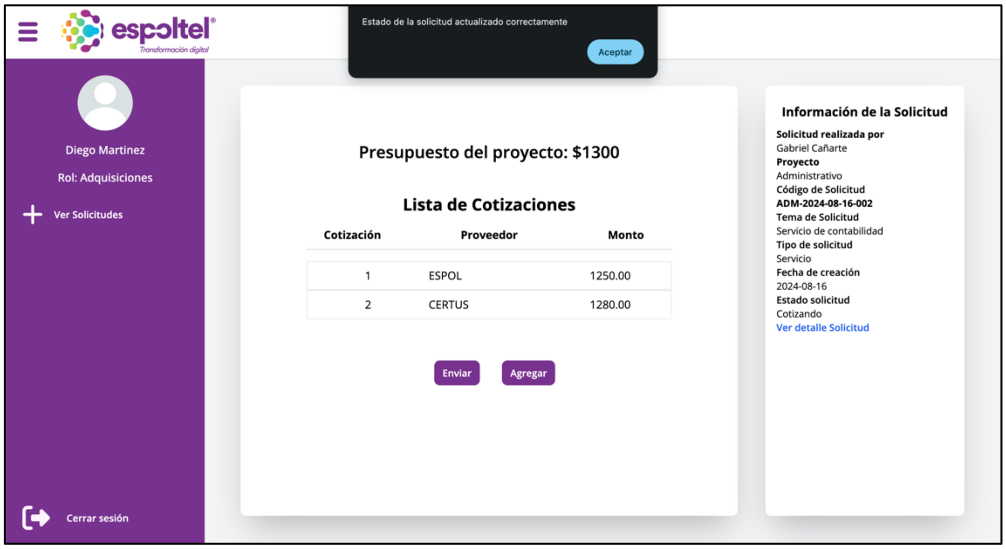
1. Begin by navigating to the "View Requisitions" section and select an existing request from the list that has the status “Quoting”.



2. Once you have selected the requisition, the system will show you the list of quotations associated to the selected requisition.



3. To send the quotations to the Project Manager, click on the “Submit” button located below the list of quotations.



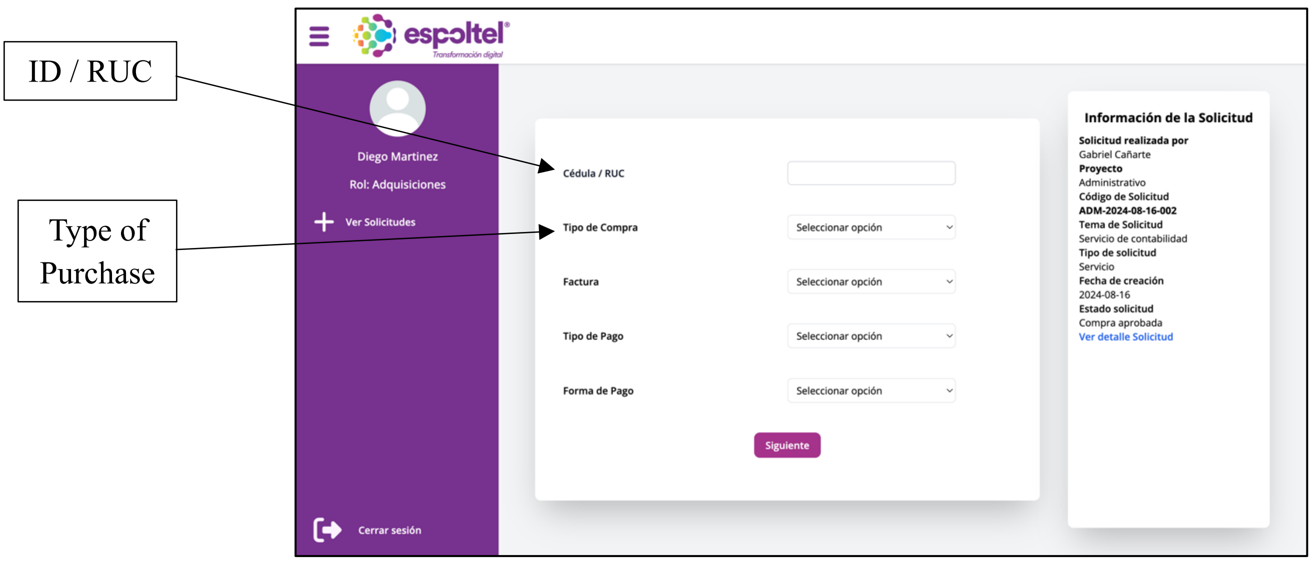
CREATE INVOICE

Please note that, to create an invoice, a quotation must have been previously accepted by the management team.

1. Select a requisition that has the status “Purchase Approved”. This indicates that the requisition has been accepted.
2. Upon selecting the requisition, the system will display a form that you need to fill out. The form includes the following fields, which may change depending on the selected options:

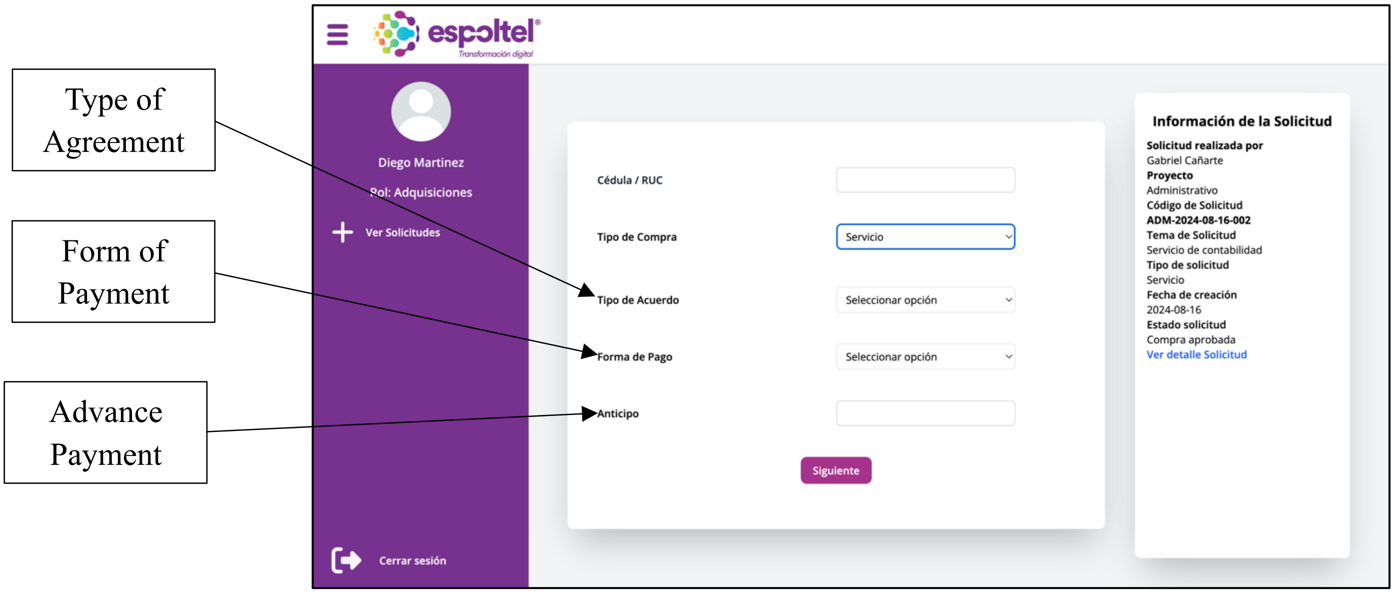
- **ID / RUC**

- **Type of Purchase** (Goods/Service)



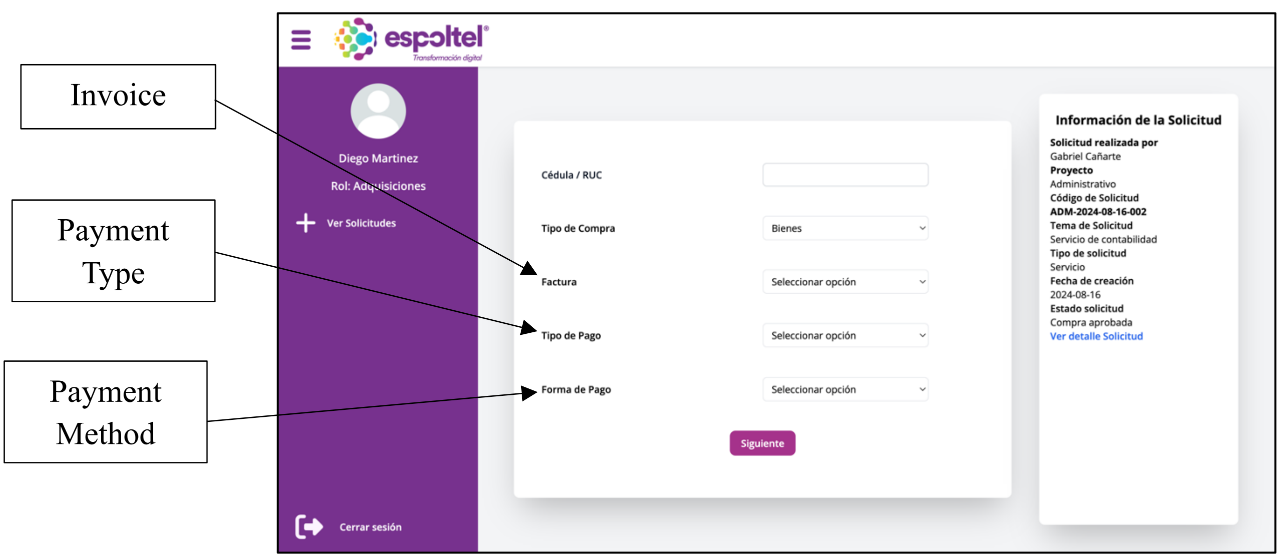
If "Service" is selected:

- **Type of Agreement**
- **Form of Payment**
- **Advance Payment**



If "Goods" is selected:

- **Invoice**
- **Payment Type**
- **Payment Method**

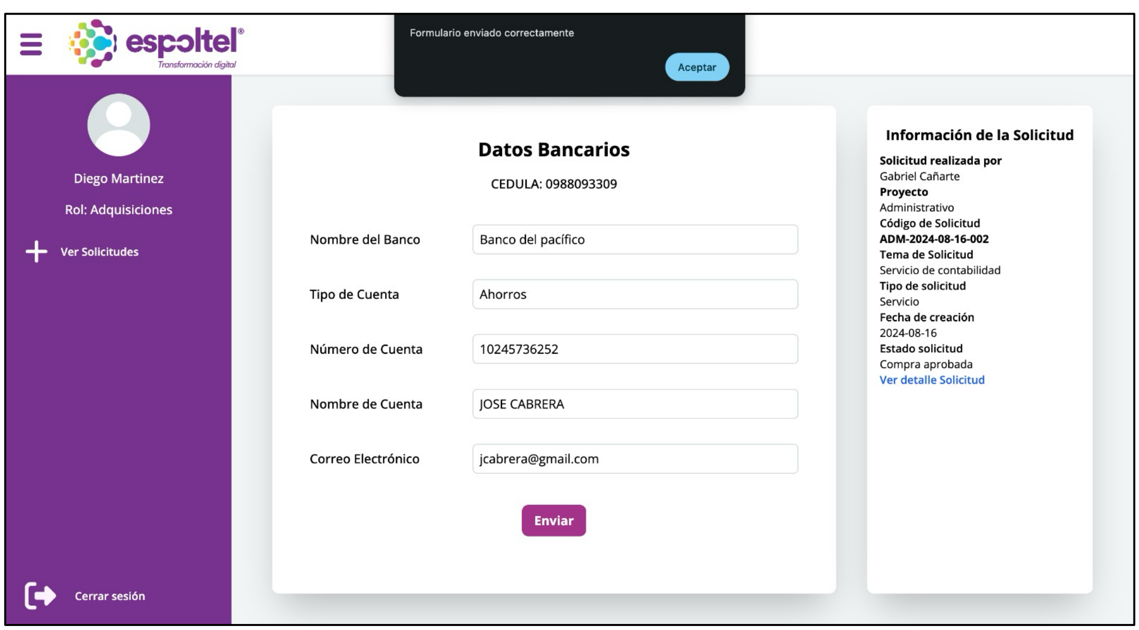


3. After entering all the required information, click on the "Next" button.

4. The system will then display another form where you need to fill in the bank details. This form includes the following fields:

- **Bank Name**
- **Account Type**
- **Account Number**
- **Account Name**
- **Email Address**

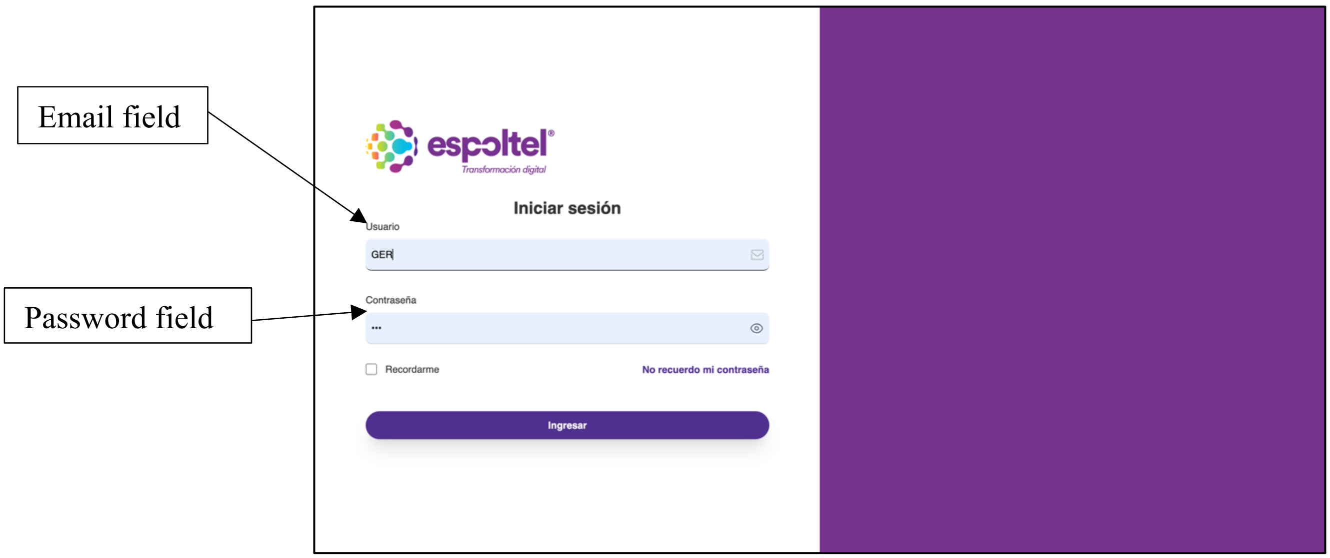
5. Once all the fields are completed, click on the "Send" button. This will send the form to the Accounting department.



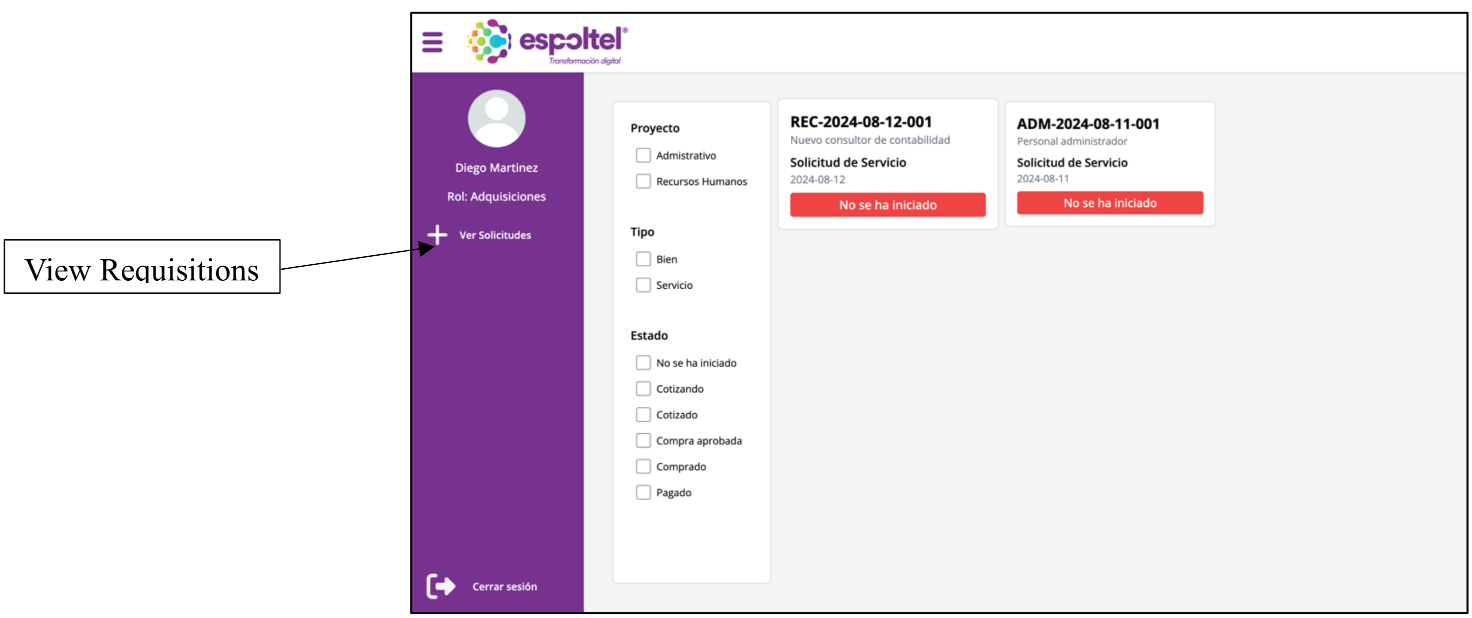
Management

LOGIN

1. Open your web browser and go to the following URL: https://espoltel-frontend.vercel.app/login.
2. The management member must enter his e-mail address in the "E-mail" field.
3. Enter the password in the "Password" field and click on "Enter".



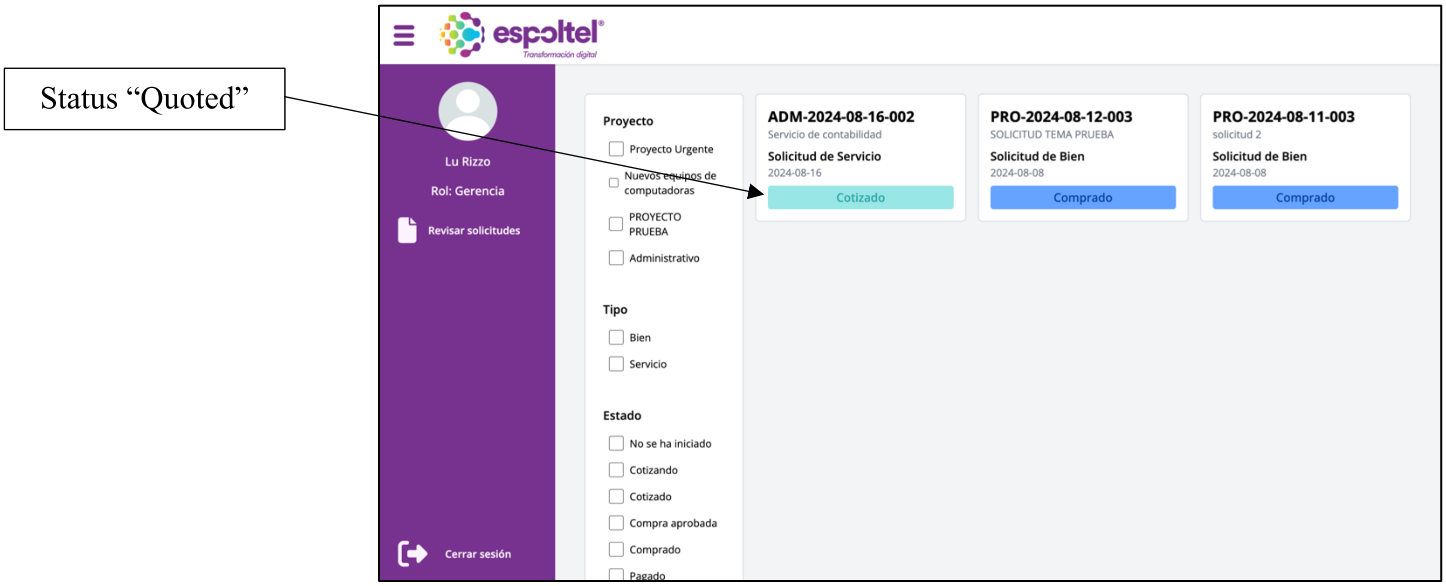
4. Afterwards, the user will be redirected to the main page where the requisitions can be viewed. The management member will be shown the option: View Requisitions.



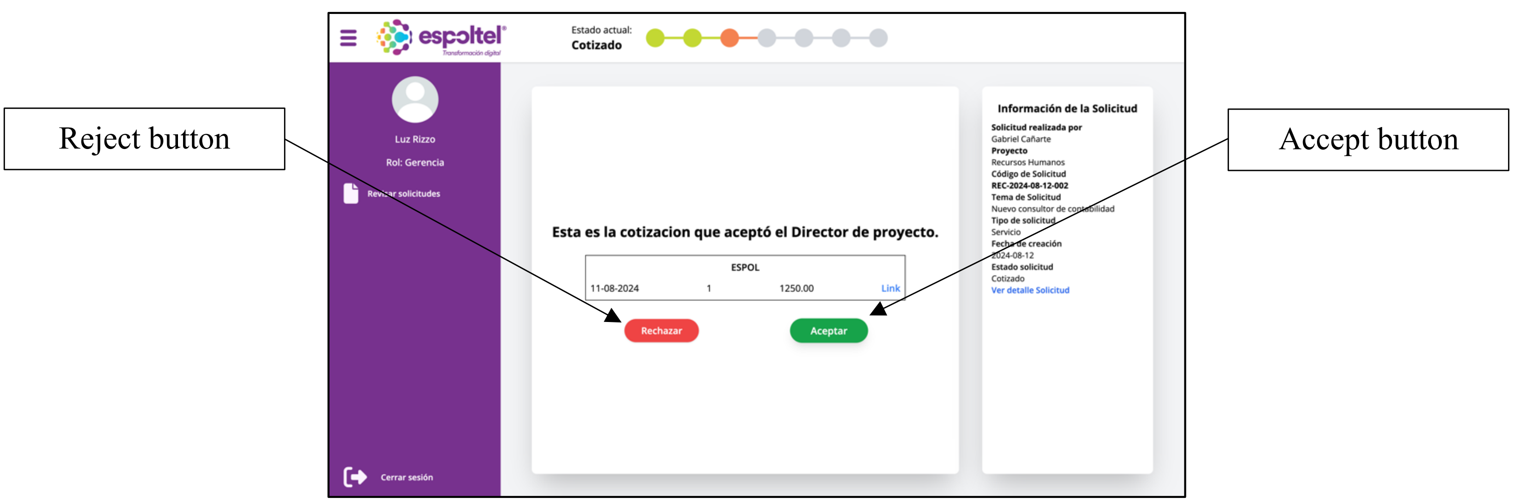
ACCEPT QUOTATION

Please note that, to accept a quotation, it is necessary that the Project Manager has previously chosen a quotation.

1. Select a requisition that has the status "Quoted". This indicates that the procurement team has already sent the quotations for that requisition.

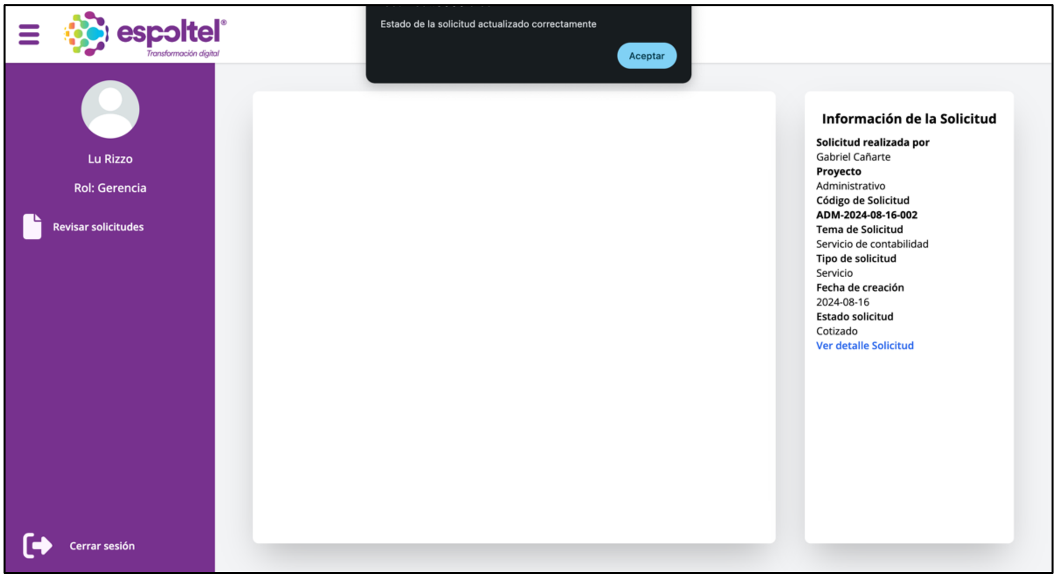


2. The system will display the quotation chosen by the Project Manager.



3. If the quotation is rejected, all quotations made for that requisition will be deleted, the status of the requisition will revert to "Not Started" and the process will start again

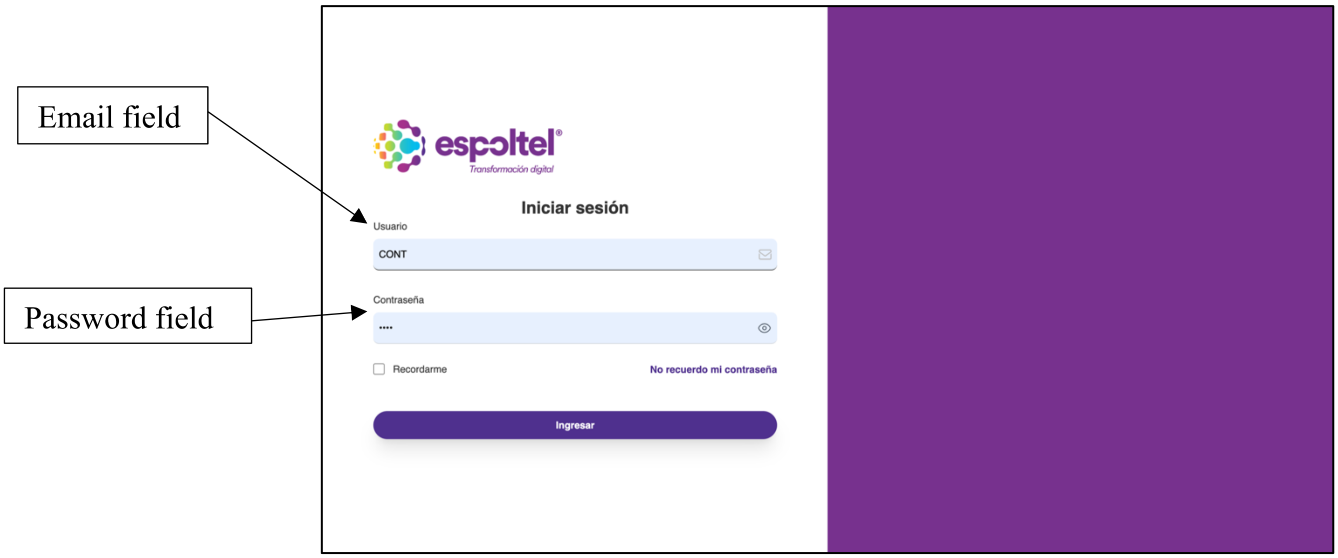
4. If the quotation is accepted, the status of the requisition will change to “Purchase Approved” and the invoice for that quotation can be created.



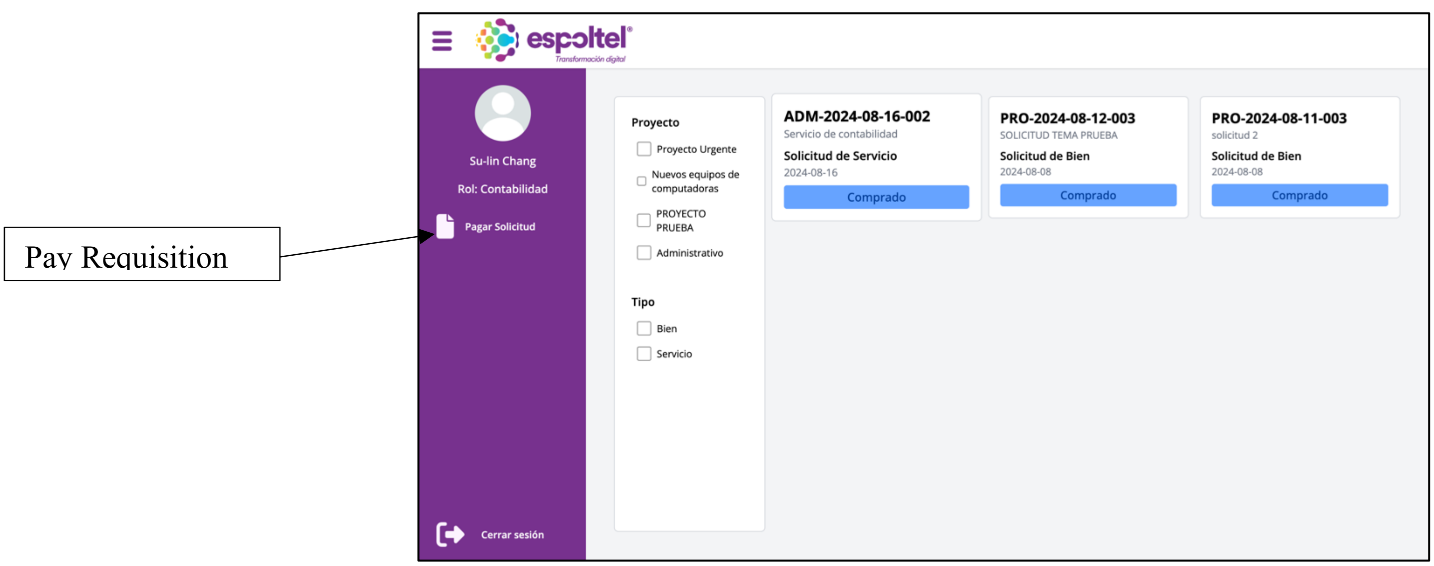
Accounting

LOGIN

1. Open your web browser and go to the following URL: https://espoltel-frontend.vercel.app/login.
2. The accounting member must enter his e-mail address in the "E-mail" field.
3. Enter the password in the "Password" field and click on "Enter".



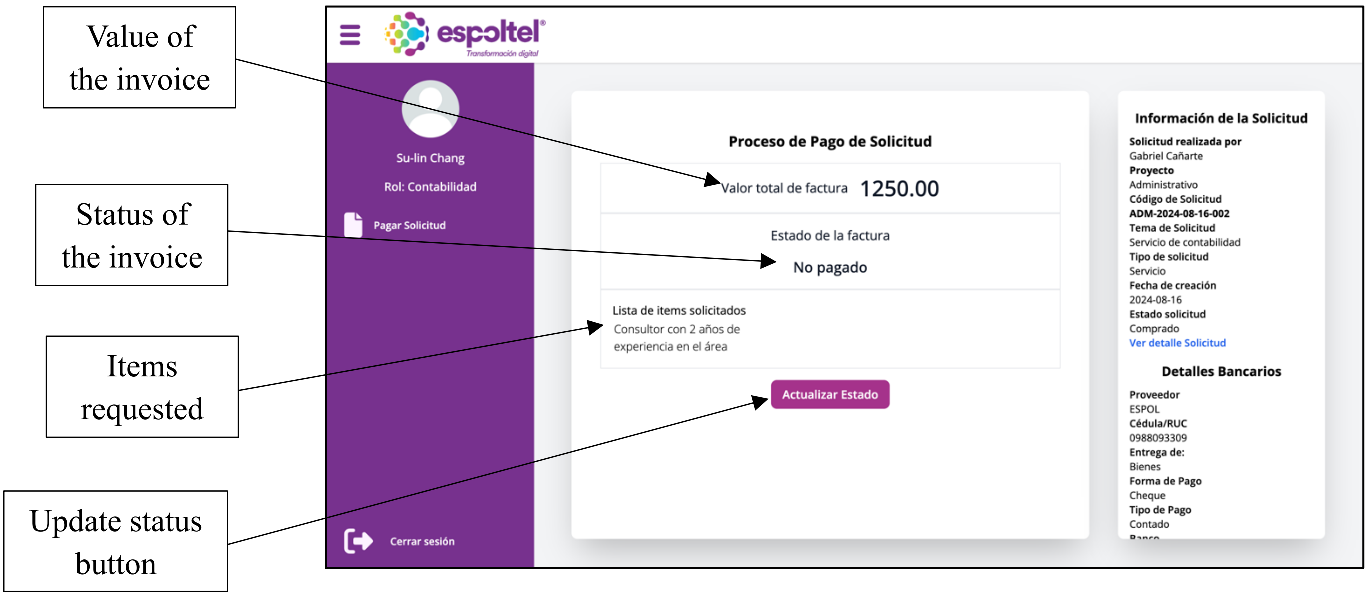
Afterwards, the user will be redirected to the main page where the requisitions can be viewed. The accounting member will be shown the option: Pay Requisition.



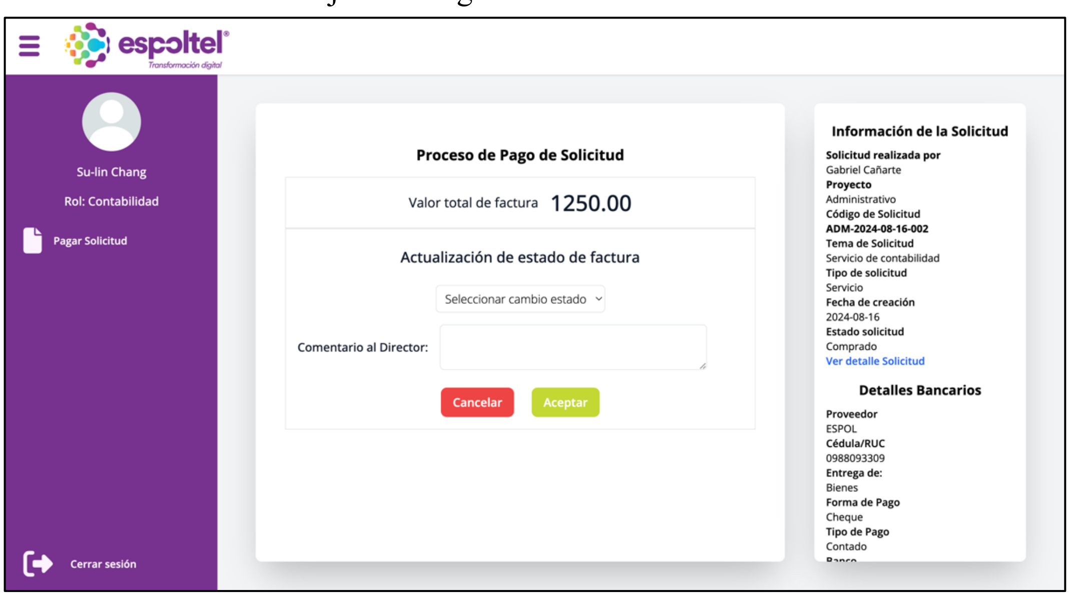
PAY REQUISITION

Please note that, to pay a requisition, the invoice form must have been sent by the procurement department.

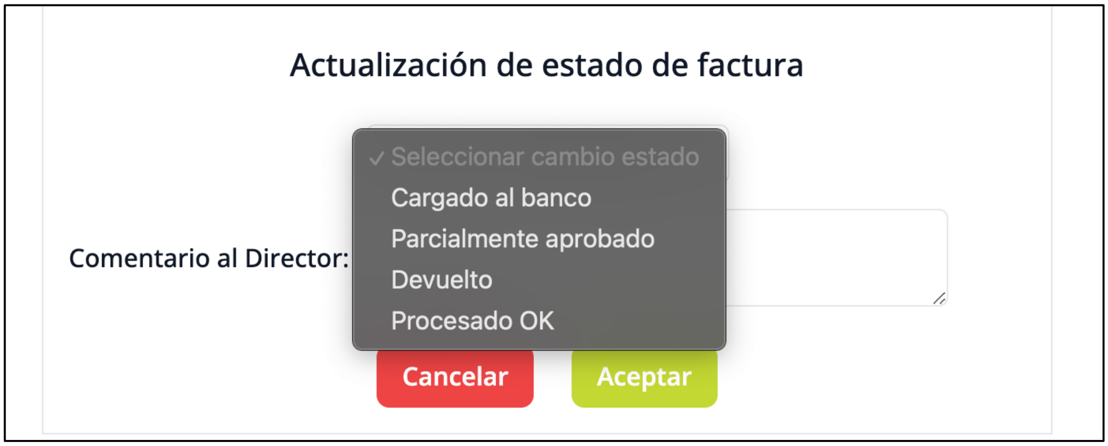
1. On the left side of the screen, click on the “Pay Requisition” option. This will display a list of all requests available for processing.
2. Click on one of the requests listed. Upon selecting a request, you will be redirected to a screen where you will be able to view the value of the invoice, the status, and a list of the items requested.



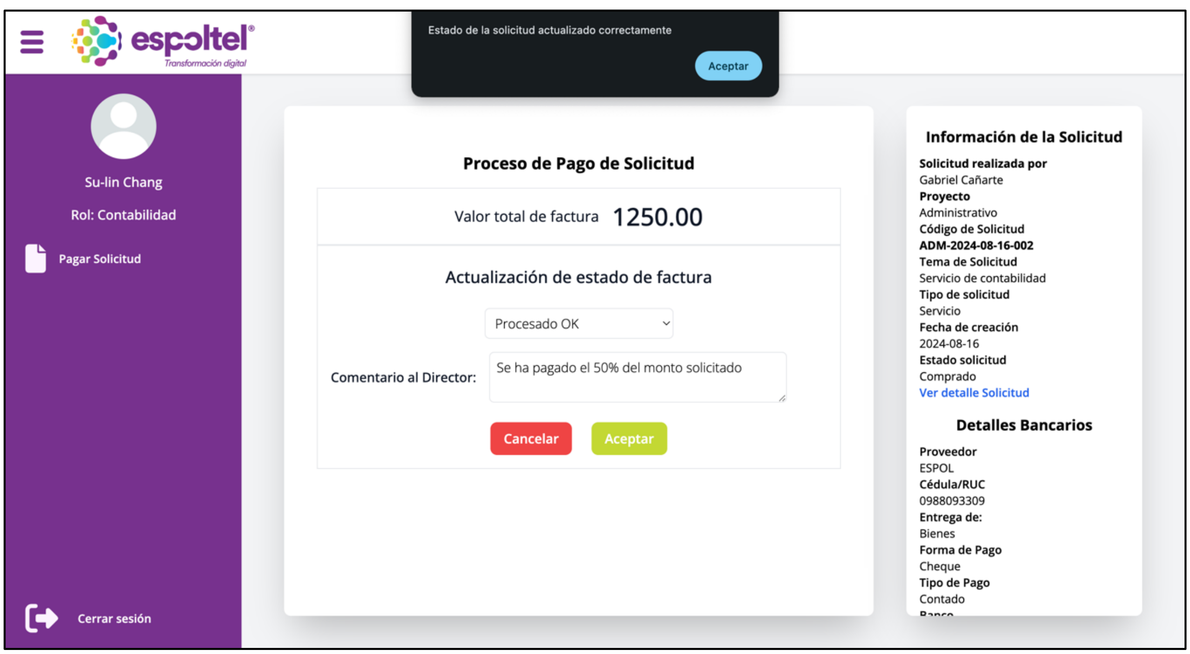
3. On this screen, you will see a button that says “Update Status”. By clicking this button, you will be given the option to change the invoice status and add a comment for the Project Manager to view.



4. The options available to change the invoice status are:
    - Charged to Bank
    - Partially approved
    - Returned
    - Processed OK



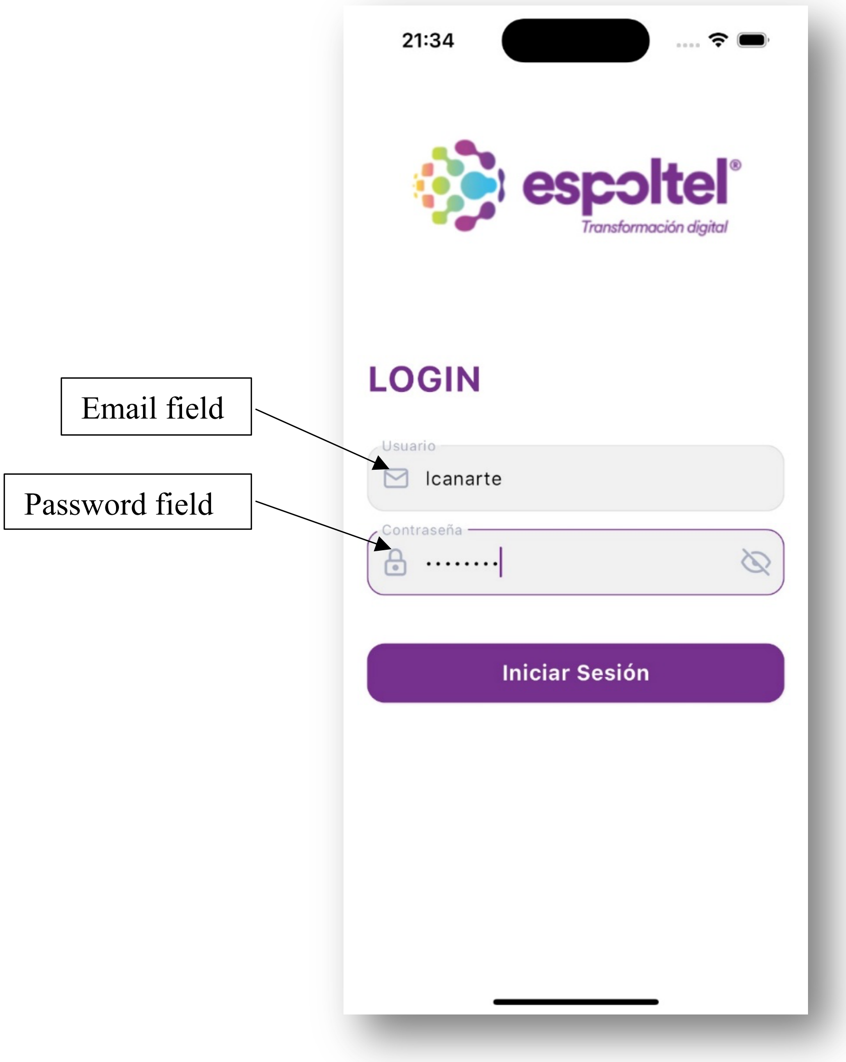
5. If you select the “Processed OK” status, the request will automatically change its status to “Paid”.



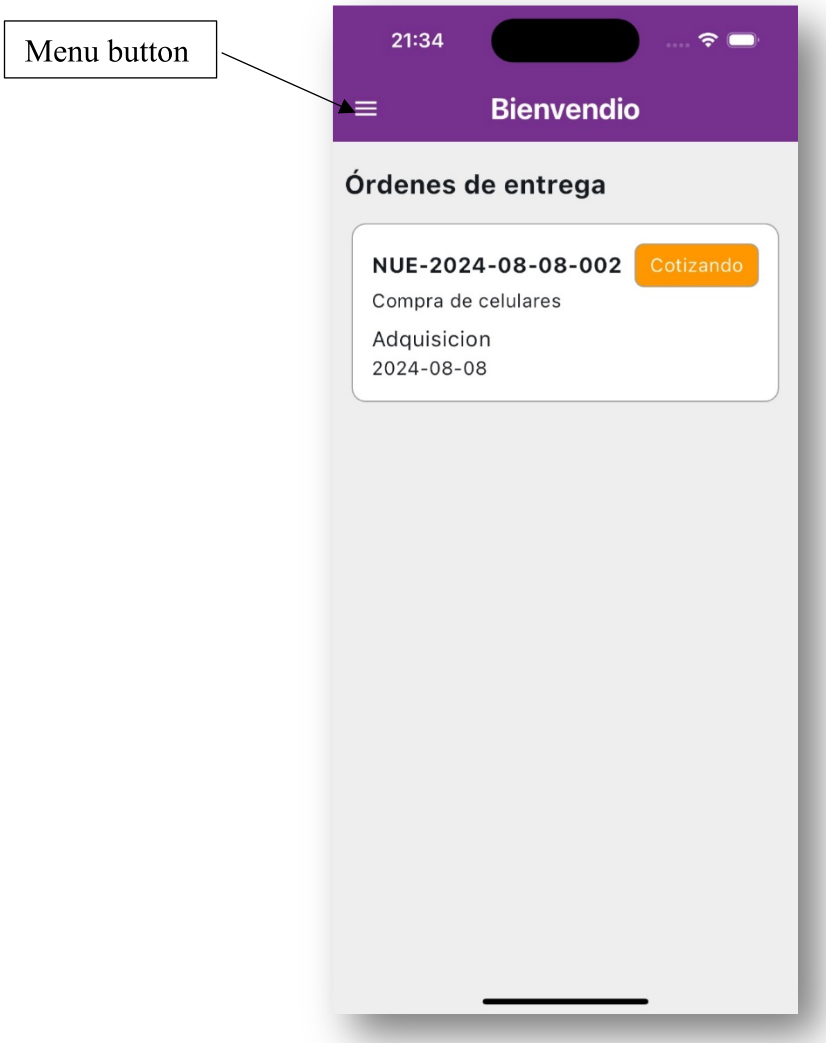
3. MOBILE APPLICATION

LOGIN

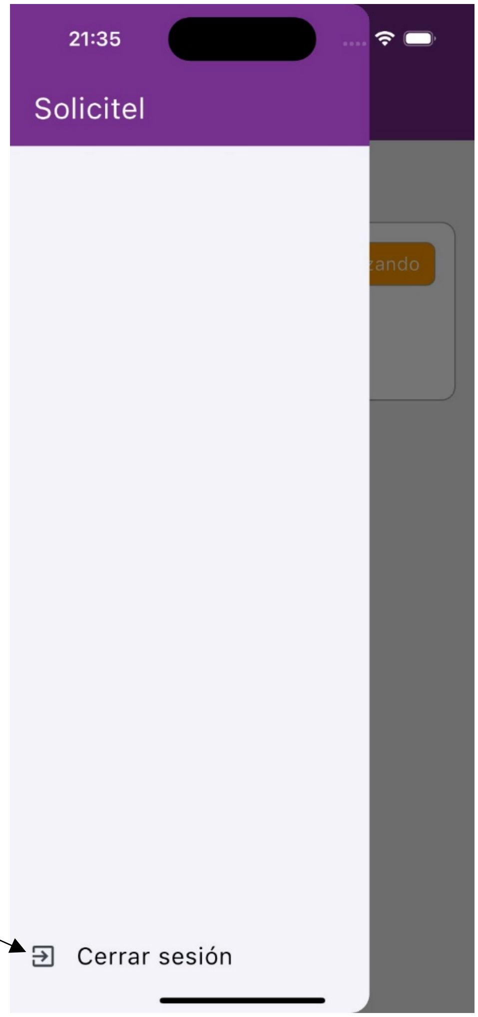
1. The user must enter his user address in the “E-mail” field.
2. Enter the password in the “Password” field and select “Iniciar Sesión” button.



3. Afterwards, the user will be redirected to the home screen where the purchase requisitions can be viewed. The user will also have access to a menu in the upper left corner.



4. Within the side menu, the user will find a button to log out.



Log out button

PURCHARSE REQUISITION CARD

On the home page, the user will find a list of cards representing the different purchase requisitions.

All cards can be clicked to enter the requisition detail screen.