PRO
CLB

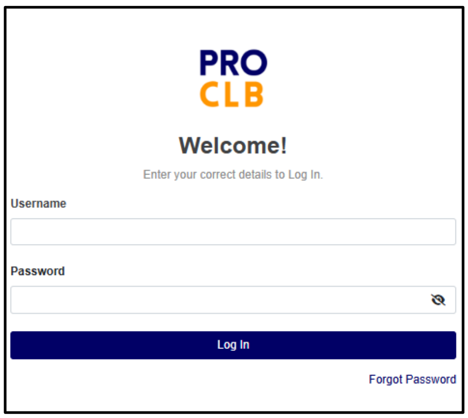
USER
MANUAL

TABLE OF CONTENTS

SET-UP ACCOUNT AND LOGGING IN

Log-in PRO CLB.

1. You will receive an email notification containing your **username** and **temporary password**.
2. Open your preferred browser, either **Google Chrome** or **Microsoft Edge**.
3. Copy the URL/link for **PRO CLB** and paste it into the address bar of the browser.
4. Click Accept button to proceed.
5. Enter your **Username** and **Password**, then click **Log In** to access.



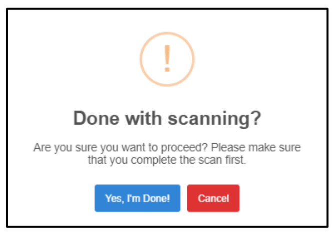
Set-up (2FA) Two-Factor Authentication using mobile phone application.

1. For new user, open the **App Store** (for iPhone) or **Google Play Store** (for Android).
2. Search for a mobile authenticator app. You can choose any of the following apps:
   - Google Authenticator
   - Authy
   - Microsoft Authenticator

   Microsoft Authenticator
3. Download and install the app of your choice on your mobile device.
4. Open **PRO CLB** and log in to your account.
5. In the 2FA setup screen, a **QR code** will be generated for you to scan.
6. Open the **Authenticator app** on your mobile device.
   - In the app, tap on the option to **Add Account** or **Scan QR Code**.

- Use your mobile device's camera to scan the **QR code** displayed in **PRO CLB**.

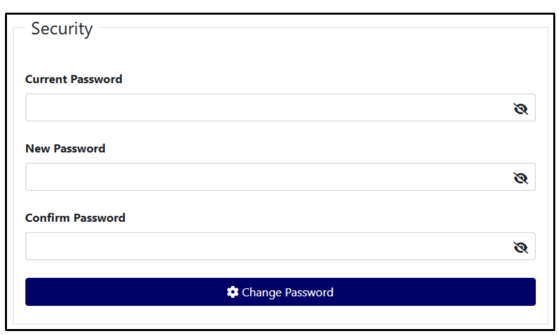
7. Once scanned, the app will generate a 6-digit verification code that updates every 30 seconds.
8. Click **Complete Setup** button to finalize the setup, then click **Yes, I'm Done**.



USER PROFILE

Change Password

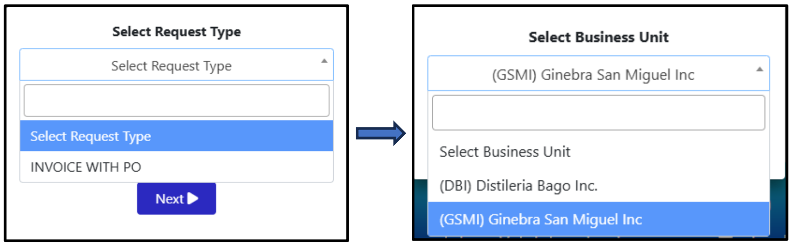
1. Click on the profile name located in the top-right corner.
2. Under **Security**, input your **current password**, **new password**, and **confirm new password**.
3. Click Change Password button.



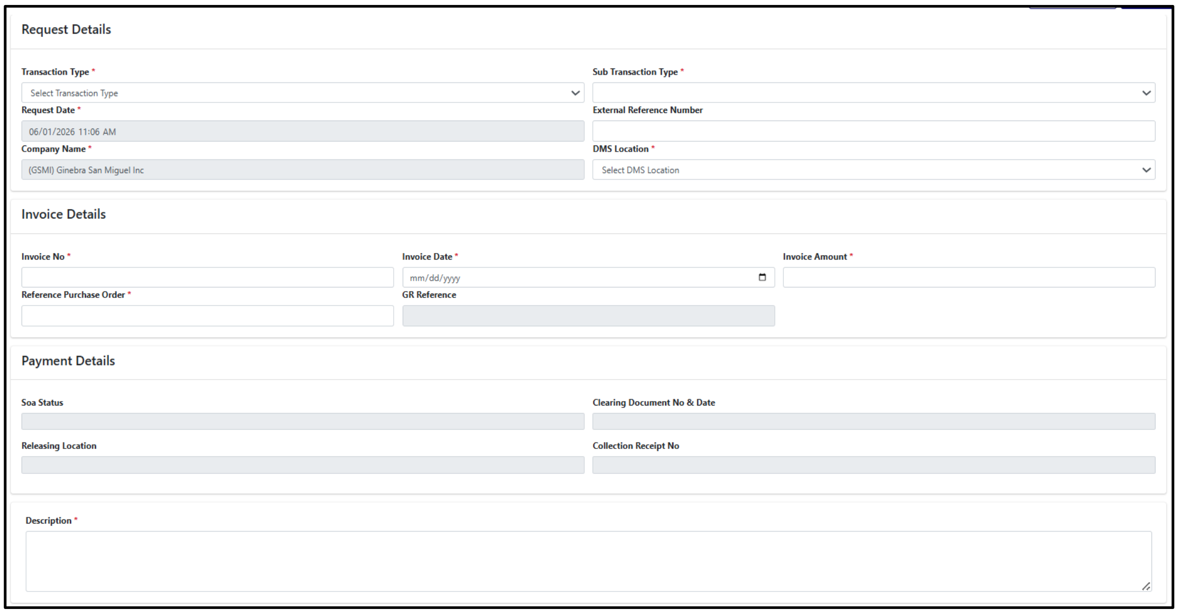
CREATION OF REQUEST

Create request in PRO CLB

1. On the **Side Panel**, click on **Create Request.**
2. Select the **Request Type** and **Business Unit**, then click **Next** to proceed.

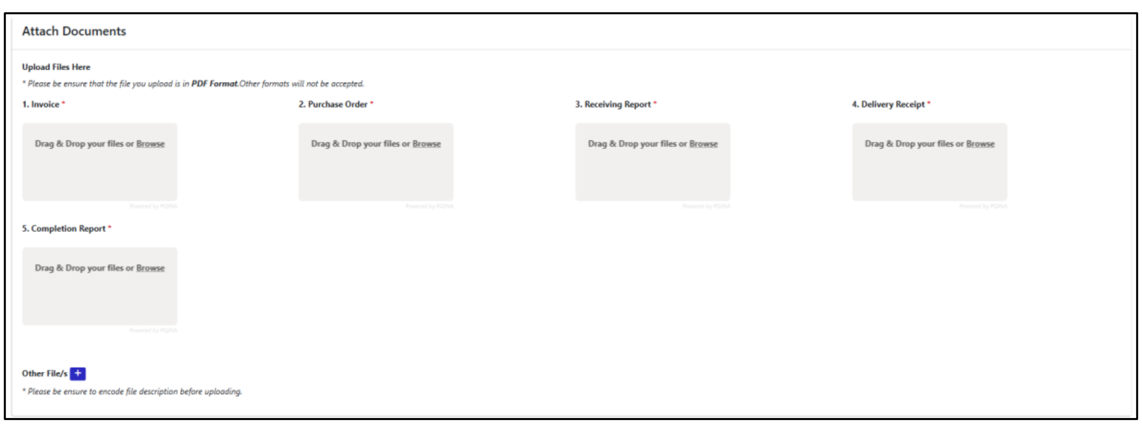


3. Under **Step 1: Input Request Details**, enter the required information in the **Request**, and **Invoice Details** sections, ensuring that all (*) required fields are filled out. Then click **Next**.

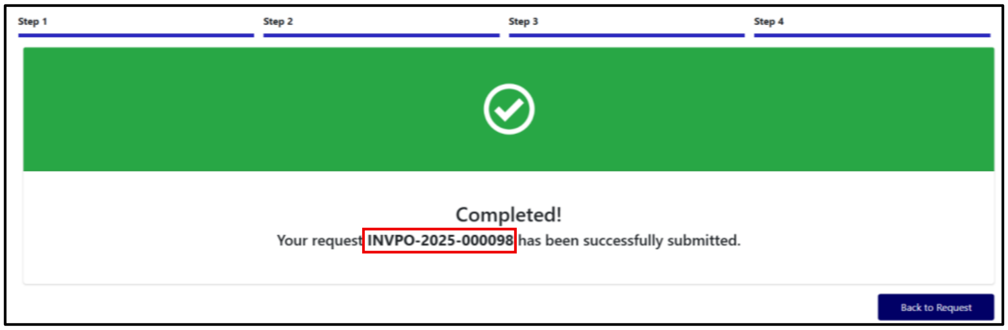


4. Under **Step 2: Attach/Upload** the required supporting documents in **PDF or excel format (*Other formats will not be accepted)***, then click **Next**.

   ***Note:** *Scanning of required documents should be in sequence*



5. Under **Step 3: Verify** all encoded information to ensure accuracy, then click **Next**.
6. Under **Step 4:** the request will be submitted for review and approval. A **request number** will be generated for your reference.

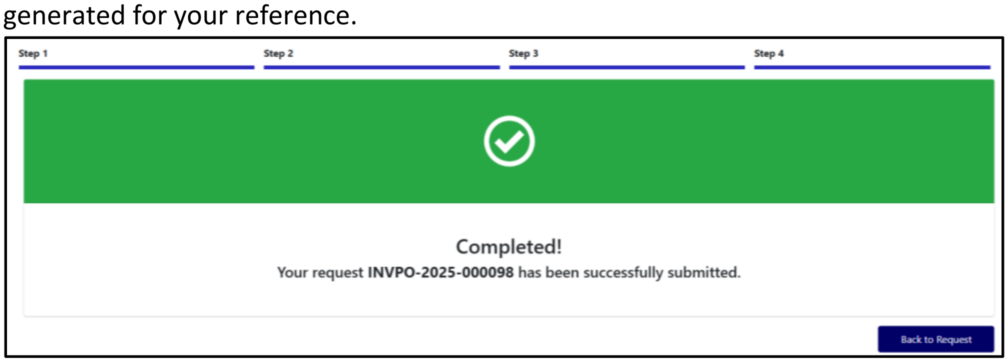


Create a request in PRO CLB as Draft

1. On the **Side Panel**, click on **Create Request.**
2. Select the **Request Type** and **Business Unit**, then click **Next** to proceed.
3. Under **Step 1: Input Request Details**, enter the required information in the **Request**, and **Invoice Details** sections, ensuring that all (*) required fields are filled out. Then click **Save as Draft or Next**.
4. Under **Step 2: Attach/Upload** the required supporting documents in **PDF or excel format**, then click **Next**.
5. Under **Step 3: Verify** all encoded information to ensure accuracy, then click **Save as Draft**.

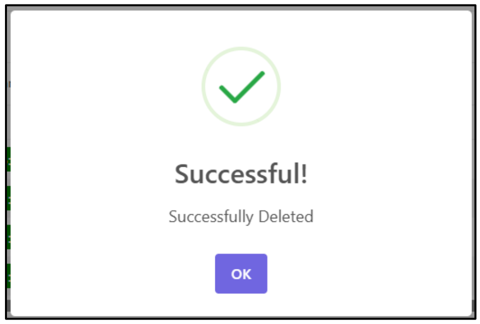
Update a request in PRO CLB

1. On the **Side Panel**, you can search for a request either from the **Dashboard** or the **Requests List.**
2. Select the desired **Request** and click **Update button** to proceed.
3. Under **Step 1: Update/Input Request Details**, enter the required information in the **Request**, and **Invoice Details** sections, ensuring that all (*) required fields are filled out. Then click **Next**.
4. Under **Step 2: Attach/Upload** the required supporting documents in **PDF or excel format**, then click **Next**.
5. Under **Step 3: Verify** all encoded information to ensure accuracy, then click **Next**.
6. Under **Step 4**, the request will be submitted for review and approval. A **request number** will be generated for your reference.



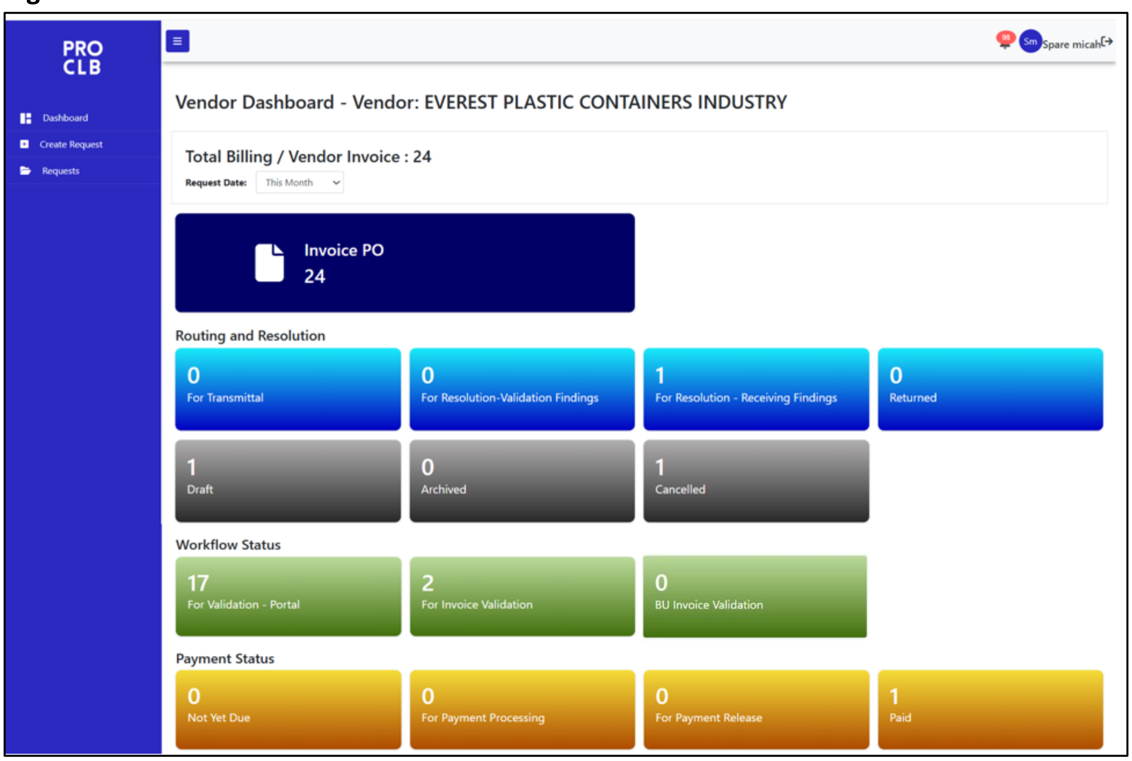
Delete a request in PRO CLB (only for requests with Draft status).

1. On the **Side Panel**, you can search for a request either from the **Dashboard** or the **Requests List.**
2. Select the desired **Request** and click **Delete button**.
   *Note: Only requests with a **Draft** status can be deleted.
3. Click **Yes.**



View a request in PRO CLB

1. On the **Side Panel**, you can search for a request either from the **Dashboard** or the **Request Register List.**



2. Select the desired **Request** and click **View button.**
3. You will be able to view the **Request Details, Approval Workflow, Transaction Log, Workflow History** and **Event Logs** information in their respective tabs.

Vendor Status Counter Panel

Routing and Resolution

- **For Transmittal** – DV approved, ready for printing of transmittal slip, and physical documents ready for transmittal to DMS sites.
- **For Resolution-Validation Findings** – Approver found issue; request returned for resolution.
- **For Resolution – Receiving Findings –** Receiver found issue; request returned for resolution.
- **Returned –** tagged as 'With Issue-RTP' (Returned to Proponent), request returned and rejected due to unresolved issues.

- Draft - initial creation stage, request is being composed, editable and not yet submitted.
- Archived **–** submitted request with pending issue for more than 30 days.
- Cancelled **–** request was voided or withdrawn by the Vendor.
- Resubmitted – Validation Findings – resubmitted requests after issue resolution.

Workflow Status

- **For Validation – Portal** – submitted for review and approval of DMS Validator.
- **For Invoice Validation** – queued for Accounts Payable team to validate and process invoice details.
- **BU Invoice Validation** – submitted for review and approval of BU Validator, BU Proponent and BU Approver/s.

Payment Status

- **Not Yet Due** - invoice is approved but not yet eligible for payment because of established payment terms.
- **For Payment Processing -** invoice is due for payment processing.
- **For Payment Release** - a check, LOA, or clearing document—is ready and awaiting release to or collection by the vendor.
- **Paid** – payment has been released and confirmed by the payment processor; the vendor has been paid.

Others (PRO CLB)

- **In-Transit – For Receiving** – physical documents have been dispatched and are currently en route to receiving DMS locations.
- **Received –** physical documents have arrived and been logged; the request is now approved for both physical and e-copy validation.
- **Resubmitted for Receiving –** request is resubmitted for BU Receiver's revalidation.
- **Completed –** request has been fully processed, approved, and tagged as Paid.

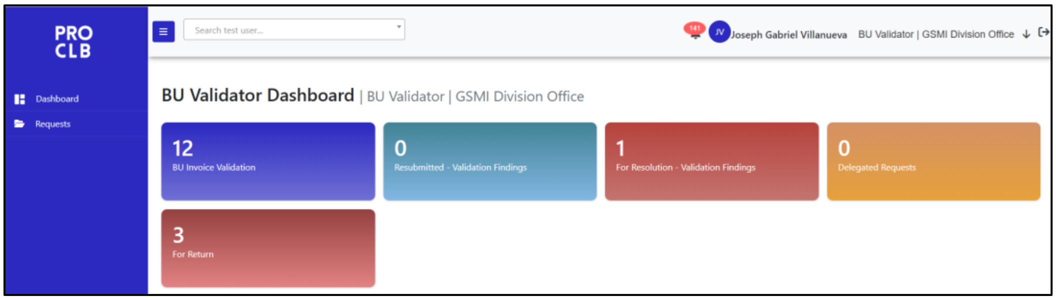
Others (SYNQ SOA status)

- **For Validation and Approval** – queued for DMT Encoding, AP Invoice Processing, AP Encoder Processing, and DV Approval.
- **DV Approved** – AP team has processed the invoice, and the Disbursement Voucher has been approved. Request is now ready for transmittal.
- **With Issue - RTP** – request tagged with issue for return to BU Proponent, with reason for returning, details of recipient and date of transmittal.
- **With Issue - FIR** – request tagged with issue for internal resolution (SYNQ).

APPROVAL OR REJECTION OF REQUEST BY BU VALIDATOR

Approve or reject request in PRO CLB

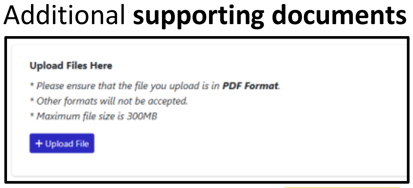
1. On the **Side Panel**, click on **Dashboard or Requests** to access the list of pending requests.

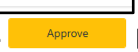


2. Click on the desired status counter panel to display the list of corresponding requests.

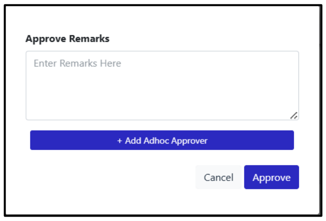
   - **BU Invoice Validation** – submitted requests for review and approval of BU Validator.
   - **Resubmitted – Validation Findings** – BU Validator found issue; request resubmitted for revalidation.
   - **For Resolution Validation Findings** - BU Validator found issue; request returned for resolution.
   - **Delegated Requests** – requests that have been reassigned (delegated) to the BU Validator for review and approval.
   - **For Return** – requests have been tagged as "With Issue RTP," enabling the BU Validator to return the request to the vendor when necessary.

3. Click **View** to open its details and attachments.
4. If there are minor corrections, update the following fields:
   - Company Name
   - Invoice Number
   - Invoice Date
   - Invoice Amount
   - Reference PO
5. Additional **supporting documents** may be uploaded as needed.



6. **For Approval:** Click the  button, input **Remarks** if necessary **(optional)**, then click **+Add Adhoc Approver** to assign a **BU Proponent**.

7. Click **Approve.**



For Rejections: Click the

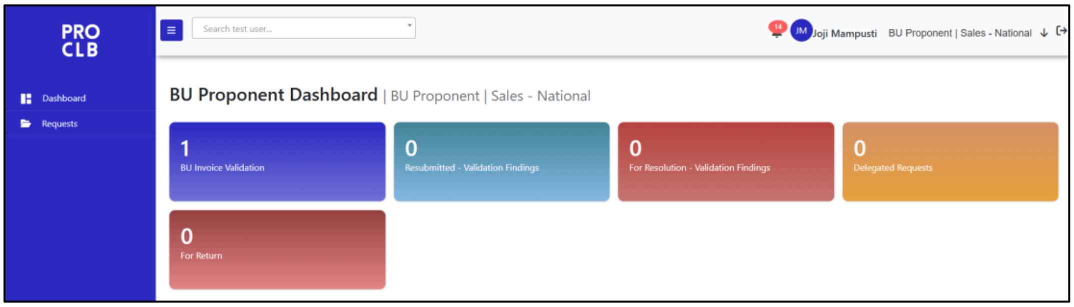
button, select **Rejection Type** from the dropdown menu and input **Rejection Remarks** in the provided field.

8. Click **Yes** to proceed.

APPROVAL OR REJECTION OF REQUEST BY BU PROPONENT

Approve or reject request in PRO CLB

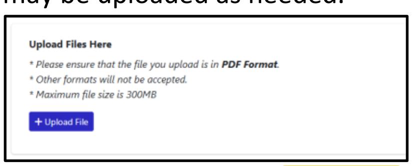
1. On the **Side Panel**, click on **Dashboard or Requests** to access the list of pending requests.

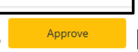


2. Click on the desired status counter panel to display the list of corresponding requests.

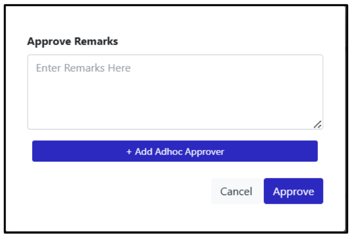
   - **BU Invoice Validation** – submitted requests for review and approval of BU Proponent.
   - **Resubmitted – Validation Findings** – BU Proponent found issue; request resubmitted for revalidation.
   - **For Resolution Validation Findings** - BU Proponent found issue; request returned for resolution.
   - **Delegated Requests** – requests that have been reassigned (delegated) to the BU Proponent for review and approval.
   - **For Return** – requests have been tagged as "With Issue RTP," enabling the BU Proponent to return the request to the BU Validator when necessary.

3. Click **View** to open its details and attachments.
4. If there are minor corrections, update the following fields:
   a. Company Name
   b. Invoice Number
   c. Invoice Date
   d. Invoice Amount
   e. Reference PO
5. Input the required GR Reference and click **Update Details**. Additional **supporting documents** may be uploaded as needed.



6. **For Approval:** Click the  button, input **Remarks** if necessary **(optional)**, then click **+Add Adhoc Approver** to assign a **BU Approver L1**.

7. Click **Approve.**



For Rejections: Click the

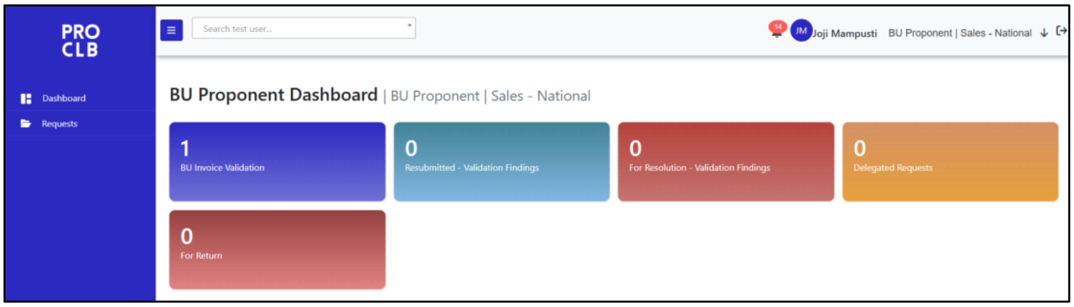
button, select **Rejection Type** from the dropdown menu and input **Rejection Remarks** in the provided field.

8. Click **Yes** to proceed.

APPROVAL OR REJECTION OF REQUEST BY BU APPROVER

Approve or reject request in PRO CLB

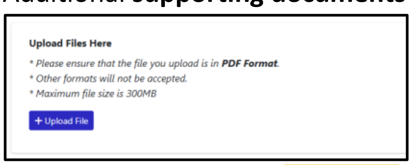
1. On the **Side Panel**, click on **Dashboard or Requests** to access the list of pending requests.

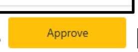


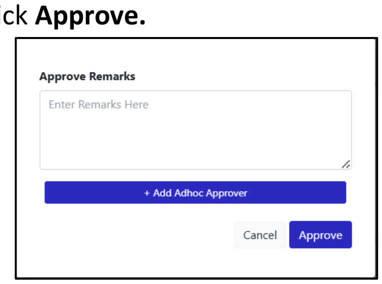
2. Click on the desired status counter panel to display the list of corresponding requests.

   - **BU Invoice Validation** – submitted requests for review and approval of BU Approver.
   - **Resubmitted – Validation Findings** – BU Approver found issue; request resubmitted for revalidation.
   - **For Resolution Validation Findings** - BU Approver found issue; request returned for resolution.
   - **Delegated Requests** – requests that have been reassigned (delegated) to the BU Approver for review and approval.

3. Click **View** to open its details and attachments.
4. If there are minor corrections, update the following fields:
   a. Company Name
   b. Invoice Number
   c. Invoice Date
   d. Invoice Amount
5. Additional **supporting documents** may be uploaded as needed.



6. **For Approval:** Click the  button, input **Remarks** if necessary **(optional)**, then click **+Add Adhoc Approver** to assign a **BU Approver L1**.
7. Click **Approve.**

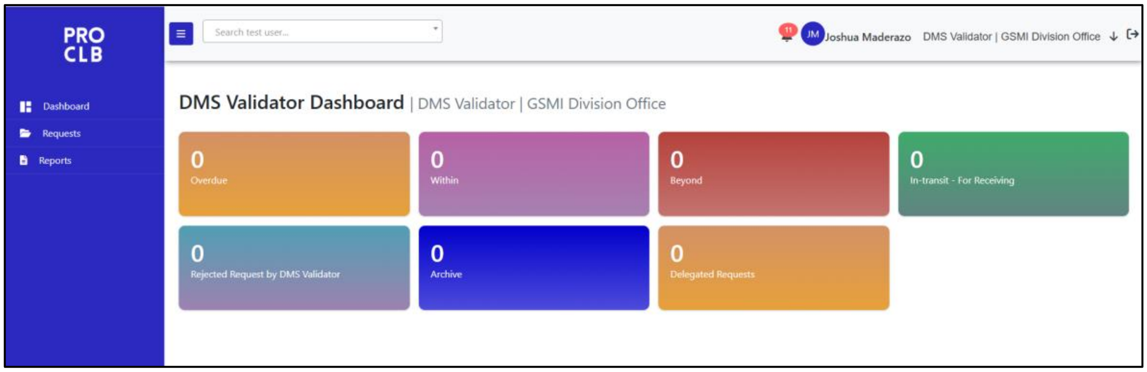


   For Rejections: Click the button, select **Rejection Type** from the dropdown menu and input **Rejection Remarks** in the provided field.

8. Click **Yes** to proceed.

APPROVAL OR REJECTION OF REQUEST BY DMS VALIDATOR

1. On the **Side Panel**, click on **Dashboard or Requests** to access the list of pending requests.
2. Click on the desired status counter panel (e.g., Within, Beyond, Overdue) to display the list of corresponding requests.



- **Overdue** - request with '*For Validation'* status and pending more than 24 hours from the time it was received '*Within*'.
- **Within** - request with '*For Validation'* status, submitted previous date or later, and pending within 24 hours from the time it was submitted 'For Validation' based on 3PM cutoff.
- **Beyond** - request with '*For Validation'* status and submission date are today and time is beyond cut-off time 3:01 PM.
- **In-Transit for Receiving** – transmitted request for receiving by BU Receiver.
- **Rejected Request by DMS Validator** – DMS Validator found issue; request returned for resolution.
- **Archive -** request with *'For Resolution – Validation Findings'* status and pending more than 30 days.
- **Delegated Request** – request that has been assigned for approval on behalf of the original approver.

3. Click **View** button to open its details and attachments.
4. If there are minor corrections, update the following fields:
   a. Company Name
   b. Invoice Number
   c. Invoice Date
   d. Invoice Amount
   e. Reference PO
5. **For Approvals:** Click the Approve button, input **Remarks** if necessary **(optional)**, then assign a **DMS Encoder** in SYNQ.

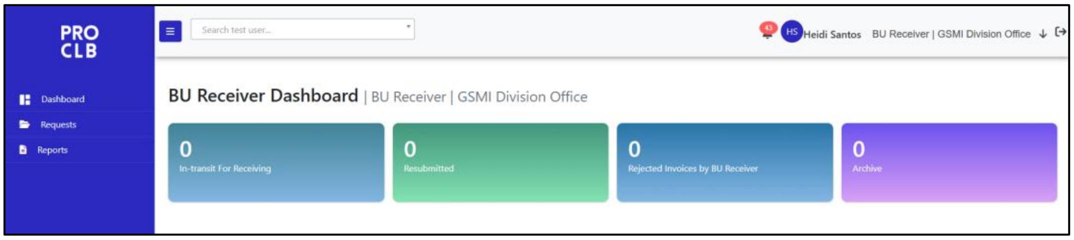
   For Rejections: Click the Reject button, select **Rejection Type** from the dropdown menu and input **Rejection Remarks** in the provided field.

6. Click **Yes** to proceed.

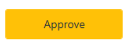
RECEIVE REQUEST BY BU RECEIVER

Receive request in PRO CLB

1. On the **Side Panel**, click on **Dashboard or Requests** to access the list of pending requests.
2. Click on the desired status counter panel to display the list of corresponding requests.



- **In-Transit for Receiving** - requests with 'In-transit - For Receiving' status.
- **Resubmitted** – resolved request and resubmitted by vendor for receiving
- **Rejected Invoices by BU Receiver** – BU Receiver found issue; request returned for resolution.
- **Archive** – requests with 'For Resolution – Receiving Findings' status and pending more than 30 days.

3. Click **View** button to open its details and attachments.
4. **For Approvals:** Click the 

button, then input **Remarks** if necessary **(optional)**.

   For Rejections: Click the

button, select **Rejection Type** from the dropdown menu and input **Rejection Remarks** in the provided field.

5. Click **Yes** to proceed.

DELEGATION OF REQUEST BY TASK DELEGATOR

Future Delegation

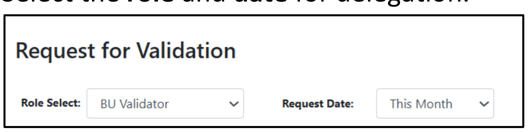
1. On the **Side Panel**, click on Future Delegations.
2. Click on **Create Delegation.**
3. Select a **Role -** Choose the role for which the delegation is being created.
    - **Area/Department (Delegated From)** – the current approver's assigned area or department.
    - **Delegated From** – the currently assigned approver.
    - **Area/Department (Delegated To)** – the delegatee's assigned area or department.
    - **Delegated To -** the person authorized to approve requests during the delegation period.
    - **Validity From and To Date -** defines the start and end dates of the delegation period.
4. Click **Submit.**

Note – Delegation Status

- **For Processing –** delegation is currently being processed in the background.
- **Active -** delegation is currently active and in effect
- **Expired -** delegation has passed its end date and is no longer valid.
- **Cancelled -** Delegation has been manually cancelled before the end date.
- **Failed -** delegation process was not completed successfully due to a system or validation error.

Delegate one or more multiple in-flight requests.

1. On the Side Panel, click on Dashboard.
2. From the status counter panel, select **Inflight Requests.**
3. Select the **role** and **date** for delegation.



4. Select one or more requests to delegate, then click Delegate Request.
5. From the list, select the **approver** and **end date.** The currently assigned approver will be reflected in the table.

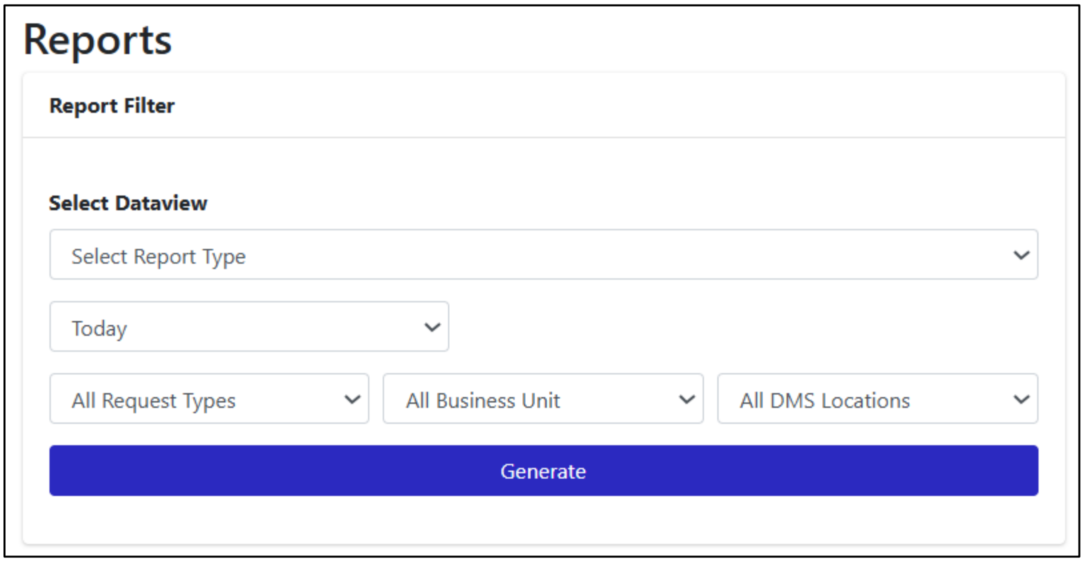
Request ID	Approver	Organization Unit
INVPO-2026-027279	Villanueva, Joseph Gabriel	GSMI Division Office
INVPO-2026-027273	Heidi Santos	GSMI Division Office

6. Click **Delegate.**

GENERATE REPORT

Generate report in PRO CLB

1. On the **Side Panel**, click on Reports .
2. Select **Report Type** from the dropdown list.
3. Specify the **date range, request type, business unit** and **location**.



4. Click **Generate** to create the report**.**
5. User may have an option to filter by **specific columns**.
6. To export the report, click the Export to Excel button.