VendoCerta

VENDOCERTA MATERIALS

Complete User Guide

VendoCerta — controlled B2B vendor onboarding

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VENDOCERTA

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GETTING STARTED

What VendoCerta is

A short introduction: what VendoCerta does, what the dashboard looks like, and who can do what.

VendoCerta is where your company manages its suppliers — from the first contact, through collecting documents, to the decision "yes, we can work with them". Instead of e-mails, spreadsheets and folders on a shared drive, it all happens in one place, with a full record of who did what and when.

What VendoCerta does for you

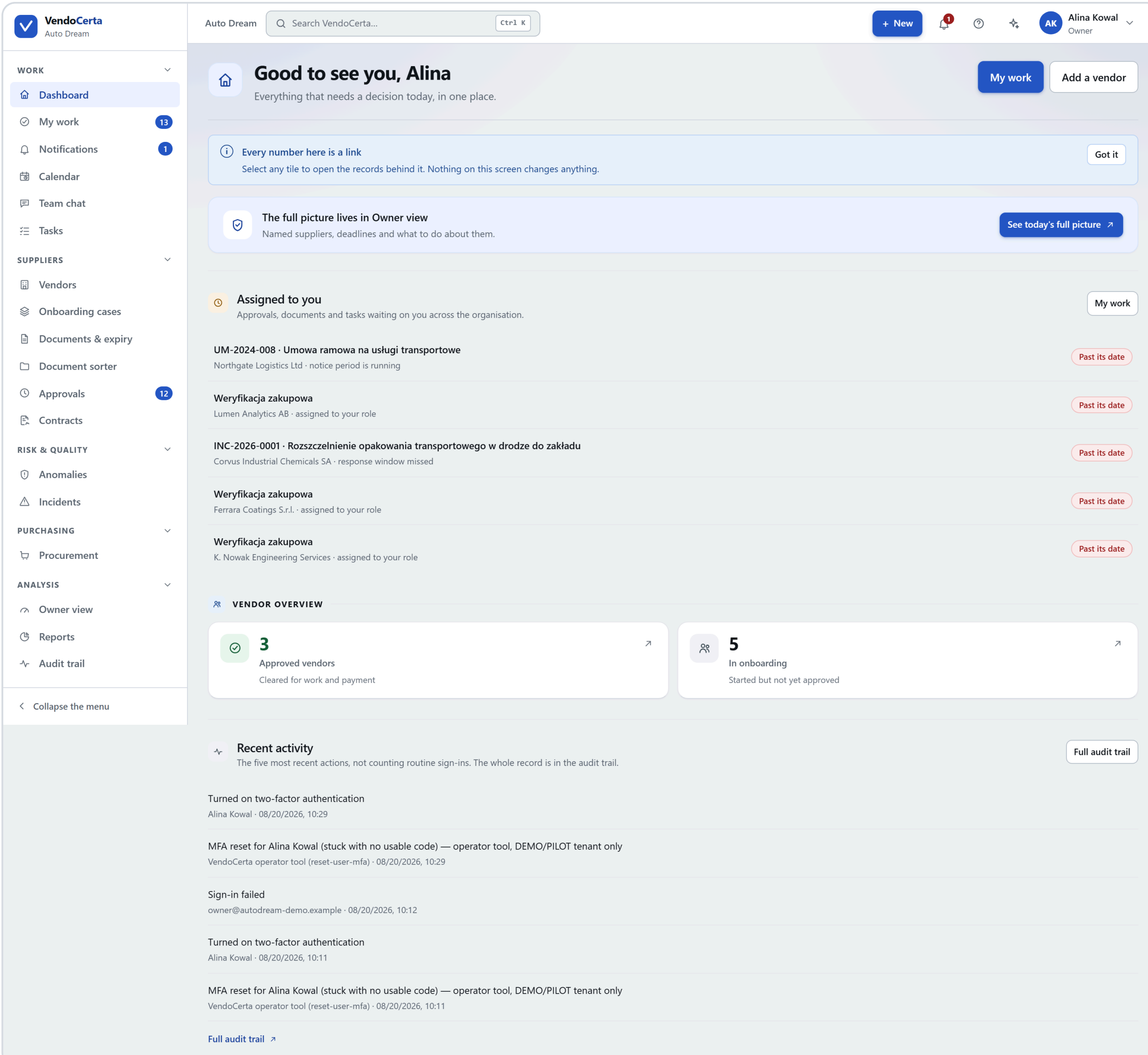
- **It walks the supplier through it.** You send one link — the supplier fills in the form and uploads the documents themselves, with no account and no password.
- **It watches for what is missing.** The system knows exactly what is still outstanding before approval, and shows it at a glance — to you and to the supplier alike.
- **It keeps approvals in order.** Steps are decided one after another, and only somebody holding the right role, or assigned to the step directly, can decide it. Two qualifications, because the difference matters: the rule "you do not approve your own request" applies today **only to bank account changes**, and a step marked skippable can be skipped by an owner or a business administrator.
- **It reminds you before it is too late.** Documents such as insurance policies and certificates have expiry dates. The automatic expiry reminders go by e-mail **to the supplier** — they are the one who has to send a new document. You see the same dates on your side: on the **Documents & expiry** screen and in the **Calendar**.
- **It remembers everything.** Every decision, every change, every viewing of confidential data goes into the audit trail — your evidence in an inspection or a dispute. An entry cannot be edited or deleted from inside the application: VendoCerta has no function for it and never overwrites an existing event.

What the dashboard looks like

The moment you sign in you get one screen answering "what should I deal with today?". It looks different depending on whether you have access to the **Owner view**:

- **Owner and business administrator** get a link to the Owner view and an **Assigned to you** list — the approvals, documents and tasks waiting on them specifically.
- **Every other role** gets a grid of counters in that space: waiting on you, overdue, missing documents, expiring within 30 days, expired.

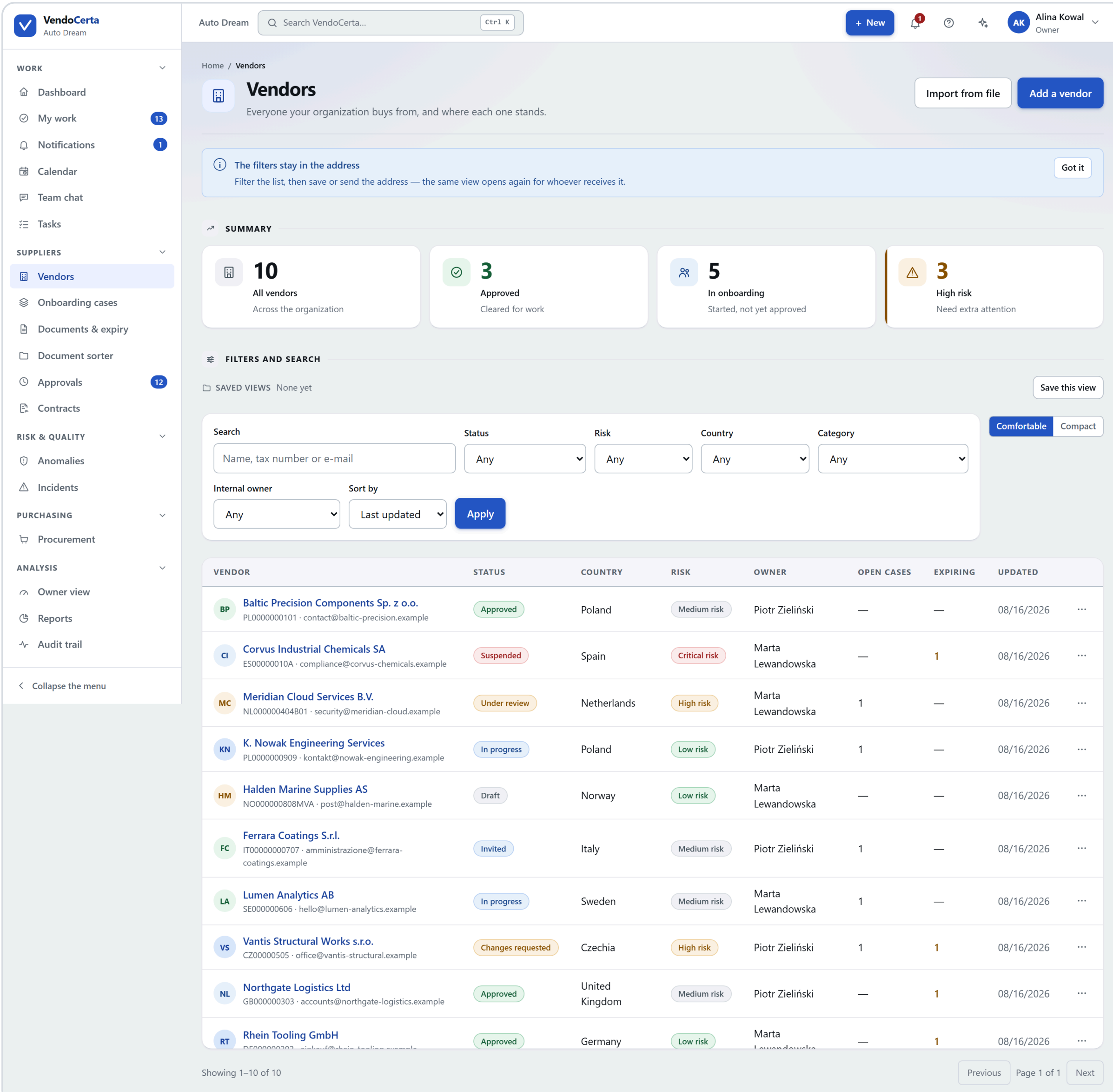
Below that, whatever your role, is a view of recent activity in the organisation — without the routine sign-ins, which would otherwise fill it completely.



The dashboard — everything that needs a decision today, in one place.

Where to find suppliers

Every supplier — whatever stage they are at — is in one place, with filters by status, risk, country and internal owner.



The vendor list, with filters by status, risk and country.

Who can do what

VendoCerta distinguishes **five** internal roles:

- **Owner** — full responsibility, including the things nobody else has: granting the owner role, automations, integrations and the licence.
- **Business administrator** — runs the supplier side: vendors, templates, cases, users. Has no backups, no diagnostics and no integration configuration.
- **System administrator** — keeps the installation healthy (configuration, diagnostics, backups, the Academy) and deliberately has no access to suppliers, documents, cases or bank accounts.
- **Reviewer** — checks documents and decides the steps assigned to them.

- **Observer** — read-only.

A supplier never signs in as a user — they get a personal, temporary link.

Where to go next

If this is your first sign-in, read **First sign-in**. If you are setting the company up from scratch, read **Company configuration**. If you want to add a supplier straight away, read **Adding your first supplier**.

FIRST STEPS

First sign-in

How to sign in for the first time, and what to do if your credentials don't match.

Before you start

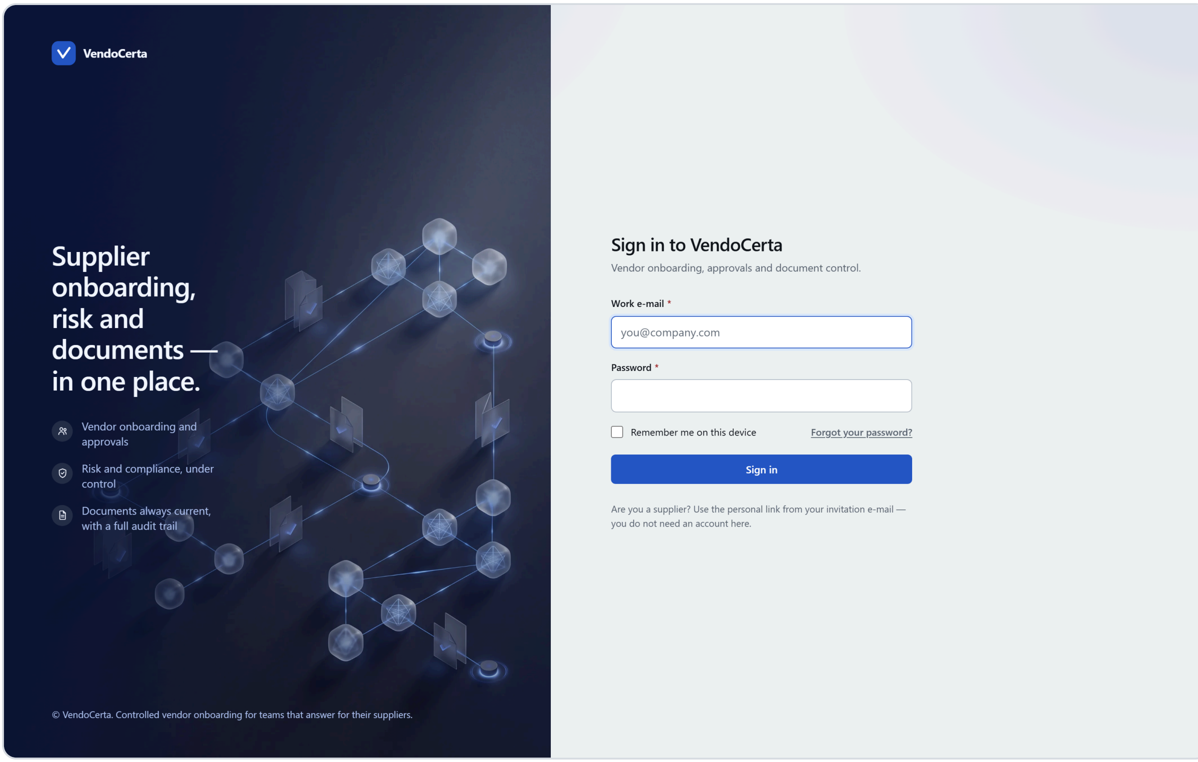
To sign in you need your **work e-mail address** and a **password**. If you are the first person in the organisation, you received your sign-in details during VendoCerta's installation. If you are joining an existing team, your starting password should come from whoever added you, in person — never by e-mail.

There is a third thing if your role is **Owner**, **Business administrator**, **System administrator** or **Reviewer**: an authenticator app on your phone (Google Authenticator, Microsoft Authenticator, 1Password, Aegis — any of them). For these roles two-factor authentication is **mandatory** and cannot be skipped. An Observer can turn it on, but does not have to.

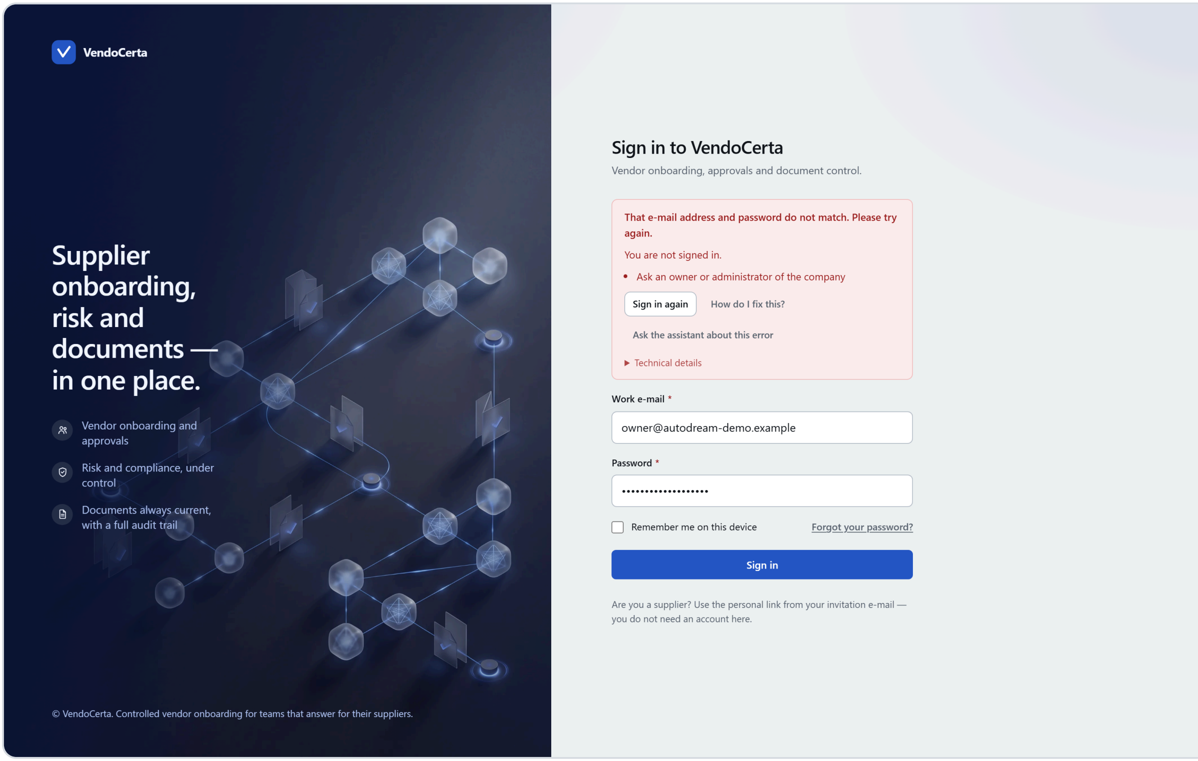
Step by step

1. Open the application's address in your browser. You will see a sign-in screen with "Work e-mail" and "Password" fields.
2. Type your e-mail and password, then click **Sign in**.
3. If the details do not match, you will see a plain message: "This e-mail and password don't match. Try again." — it deliberately does not say whether the e-mail or the password is wrong, so a stranger cannot use it to check whether a given account even exists.

4. Once you sign in successfully you land on the dashboard — unless your role requires two-factor authentication and you have not turned it on yet. In that case the application takes you first to the **second-factor setup** screen: you scan a QR code with the app on your phone, type in the six-digit code, and only then see the dashboard. Save the backup codes it gives you at that point — without them, losing your phone means contacting an administrator.



The sign-in screen — work e-mail and password.



The message on incorrect sign-in details — it doesn't reveal which field is wrong.

Not for you if you are a supplier

If you are a supplier invited to complete some documents, **you do not create an account here and you do not sign in with a password**. You get a personal, temporary link by e-mail — just click it. This sign-in screen is for staff of the company running VendoCerta only.

Changing the language

Click your name in the **top right corner**. In the account menu, next to the theme switch, is a **LANGUAGE** section listing eight languages, each written in itself: Polski, English, Deutsch, Español, Français, Italiano, Русский, Українська. On a narrow screen the same switches sit under the screen list, once you open the main menu.

Each person picks their language independently — it is a personal setting, not a company one, and it is saved to your account, so it follows you to other devices.

If you have forgotten your password

On the sign-in screen, below the fields, there is a **Forgot your password?** link. You enter your e-mail address, get a message with a link, and set a new password yourself. The link is single-use and expires.

Two things worth knowing ahead of time:

- An administrator **cannot** change your password for you. The Users & roles screen only offers "Change role" and "Disable" — the password is yours alone.
- Resetting your password does **not** bypass two-factor authentication. After setting a new password you still enter the code from the app on your phone.

Where to go next

After your first sign-in as Owner, it is worth going through **Company configuration**, then **Adding staff and assigning roles**, before you invite your first supplier.

SETTINGS

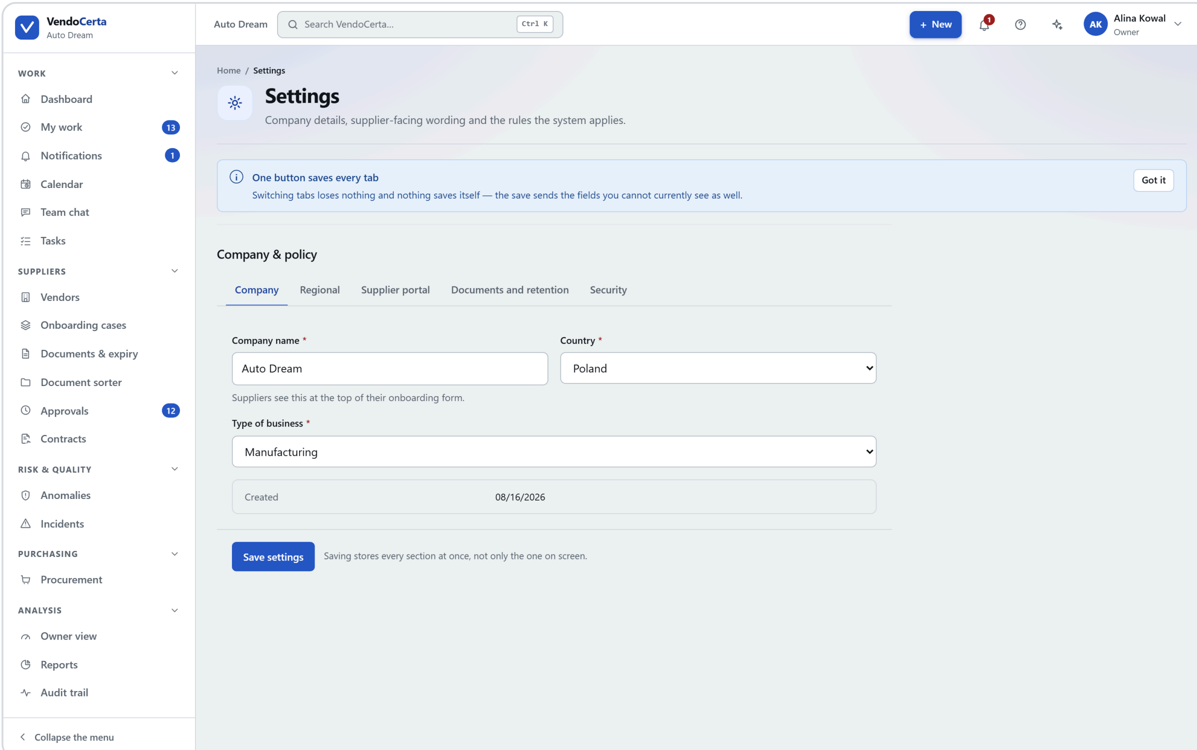
Company configuration

Where to change company details, document policy, and the welcome message for suppliers.

VendoCerta's first launch walks you through a short wizard (company name, logo, language, time zone, type of business). This guide is about what happens **afterwards** — how to get back to those settings, and what else you can configure once the company is already running in the system.

Where to find it

In the left-hand menu, under **"Administration"**, click **Settings**. The screen is split into five tabs — not everything below is visible at once. Everything on this screen can be changed at any time, and the change applies immediately — and like any other change in the system, it goes into the audit trail.



The Settings screen — company and vendor policy, document retention.

Worth setting up from the start

- **Company name** — the supplier sees this at the top of their onboarding form, so it should be recognisable.
- **Support e-mail for suppliers** — shown to suppliers when they get stuck with the form or their documents.
- **Welcome message for suppliers** — a short, friendly line attached to every invitation. It does not need to be long — it just needs to sound like you.
- **Default risk level for a new supplier** and **default language** — starting values used when you add a new supplier without spelling these out.

Settings that affect the security of the process

- **Invitation links valid for (hours)** — after this time the link stops working and a new one has to be sent.
- **Keep documents and audit entries for (days)** — the retention policy; the default value is 2555 days, i.e. seven years, matching typical procurement audit requirements.
- **Largest document a supplier can upload (MB)** — protection against oversized files.

The installation's own details live elsewhere

The installation identifier, the application's address, the mailbox address and where documents are stored **are no longer on this screen**. They moved to the **System centre**, under the "Installation" tab — along with the rest of the technical side. This screen sets company policy, not the state of the machine.

One thing worth knowing for a pilot installation: VendoCerta's e-mails then land in a local preview inbox rather than recipients' real mailboxes. You will find that inbox's address in the system centre, under the "Services" tab.

Don't forget to click "Save settings"

Changes on this screen do not save themselves — there is a clearly marked **Save settings** button at the bottom of the page.

Where to go next

The natural next step is **Adding staff and assigning roles** — before you start inviting suppliers, it is worth having someone on the team who can check documents independently of you.

TEAM & ROLES

Adding staff and assigning roles

How to add someone to the team, the five roles, and why more than one person matters.

Why this matters before you onboard suppliers

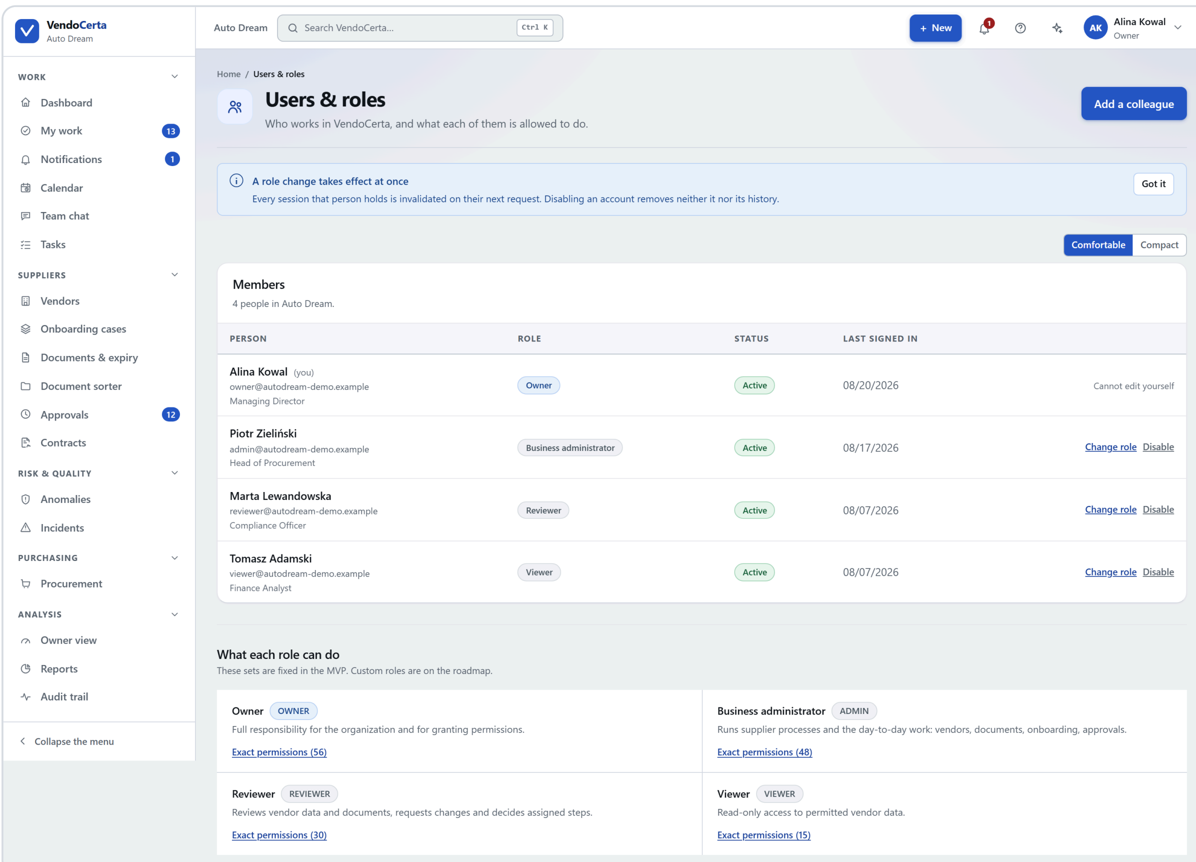
One person should not be able to add a supplier, check their documents, and approve them, all by themselves — that is a classic guard against mistakes and abuse.

It is worth knowing exactly where the line runs between what the system enforces and what depends on who you staff. VendoCerta only forces separation of people for **bank account changes** — there, the final approval can be given by neither the person who proposed the change nor the one who confirmed the document or verified the details. In ordinary onboarding there is **no such rule**: whoever holds the right role can decide a step, even in a case they opened themselves.

So separation of duties in onboarding comes from who you add and which role you give them, not from a lock in the code. That is why this screen gets filled in before you invite your first supplier.

Where to find it

In the left-hand menu, under **"Administration"**, click **Users & roles**. You will see a single full-width table of everyone in the organisation. The add-person form does not take up permanent space here — it hides behind the **Add person** button in the top right, which opens a side panel.



The Users & roles screen — the team list and the add-person panel.

Five roles to choose from

- **Owner** — full administration of the organisation, users, settings and the audit trail. The only role that can grant the Owner role, and the only one that manages automations, integrations and the licence. In practice one, maybe two people.
- **Business administrator** — runs vendors, templates and processes. Cannot grant anyone the Owner role, and has no backups, diagnostics or integration configuration.
- **System administrator** — keeps the installation running: configuration, diagnostics, backups, the Academy and the audit trail. Deliberately **has no access** to suppliers, documents, cases or bank

accounts — that is the point of splitting this role from the business administrator.

- **Reviewer** — checks supplier data and documents, requests corrections, and decides the approval steps assigned to them.
- **Observer** — read-only access to permitted supplier data. A good role for someone who needs visibility but should not change anything.

Next to each role is a **Detailed permissions** button with a count in brackets — for example "Detailed permissions (23)". It opens a side panel with the full list of what that role can actually do.

Adding a person

1. Fill in their **full name**, **work e-mail** and, optionally, their **job title**.
2. Choose a **role** from the list.
3. Set a **starting password** — at least 12 characters, mixing upper and lower case, digits or symbols.
4. Click **Add person**.

Important: hand the starting password to that person **in person, not by e-mail**, and ask them to change it at their first opportunity. This is the only moment the password exists in plain form outside the database itself — do not leave it in a message that could be forwarded on.

Changing a role and disabling access

Next to an existing person you have **Change role** and **Disable** links — but not always, and not for everyone:

- Never next to yourself.
- A business administrator, on the Owner's row, sees **"Owner only"** instead.
- A Reviewer and an Observer, who can see this list but do not manage users, get no actions column at all.

Changing a role takes effect immediately — permissions are checked on the server on every request, not by hiding buttons in the interface, so new restrictions apply straight away, even if that person still has a browser open.

Where to go next

Once you have at least one other person on the team with a Reviewer or Administrator role, you can safely move on to **Adding your first supplier** — there will be someone to check documents independently of you.

VENDORS

Adding your first supplier

How to add a supplier to the register — which fields are actually required to get started.

Watch the whole process

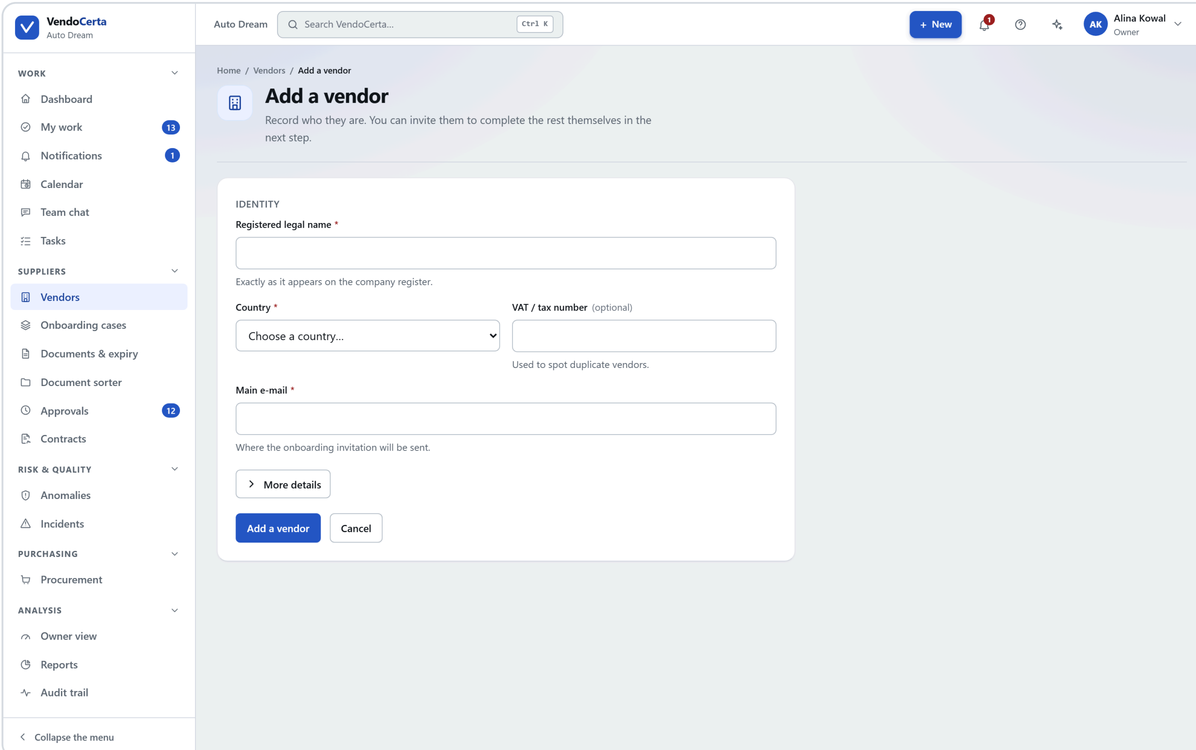
The video below shows the whole process live — adding a supplier, starting onboarding and sending the invitation — on the real VendoCerta interface, narrated and captioned in English. If you would rather read, the same steps follow below.

Before you start

Adding a supplier to VendoCerta is the first step — it **does not** send any invitation yet, and it does not need a full set of data. Enough to identify the supplier unambiguously is enough; they will fill in the rest themselves once you send them the invitation.

Step by step

1. In the left-hand menu click **Vendors**, then **Add vendor** in the top right corner.
2. You will see a form with one section visible: **Registration details**, four fields. The rest — **Contact** and **Internal classification** — is folded under a collapsible heading, **More details**. It is closed by default when adding a new supplier; it opens on its own when editing an existing record, or when the server rejects one of the fields hidden inside it.



The empty add-vendor form.

1. Fields marked with an asterisk (*) are required. In practice three are enough to get started: **Full legal name**, **Country** and **Primary e-mail**. Everything else — registration number, tax ID, address, website — the supplier will fill in themselves during onboarding.

2. **Business criticality** has a default value set in Company settings, but you can change it by hand right away — you decide how closely to watch a given supplier. The field is named this way, rather than "risk level", deliberately: it is your own assessment of how much the supplier matters to the business. The risk level the system calculates is something else, and lives on the **Risk** tab of the supplier's record.

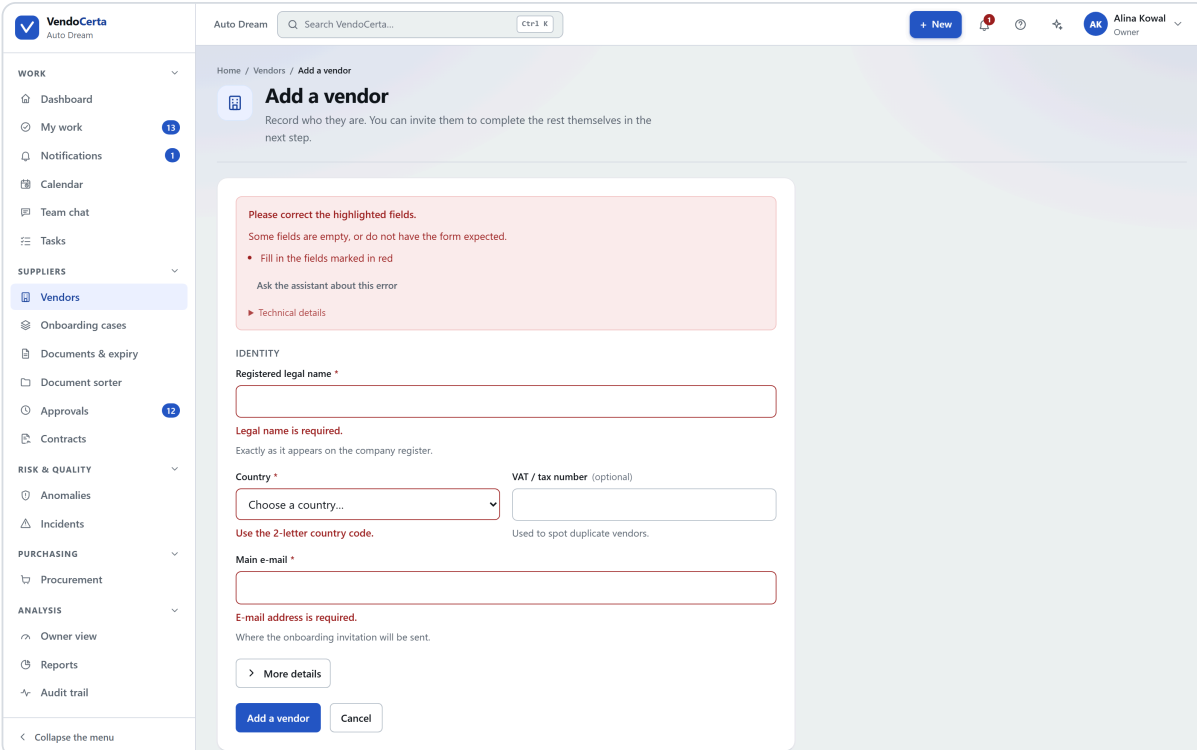
3. **Internal owner** and **Category** are optional, and help you filter the vendor list later.

4. **Internal notes** are visible only to your own team — the supplier never sees them.

5. Click **Add vendor**.

If something is missing

If you try to save the form without a required field, VendoCerta does not send you anywhere else — it shows a red outline around the missing field and a specific message, e.g. "The field 'Legal name' is required." Exactly as in the business register.



Validation messages after trying to save an empty form.

After saving

The new supplier lands on the list with status **Draft** — visible only inside your own company, with no onboarding case yet and no invitation sent. This is a safe state: you can correct it, change its category, or simply leave it for later.

Where to go next

Adding a supplier alone does not send them anything yet. Now open that supplier's record and, on the right-hand side, find the **Onboarding** panel with an **Onboarding template** dropdown and a **Start onboarding** button — that is what creates the actual "case" the supplier will fill their data into. The template you choose decides which documents and fields you will ask for; more on that in **Sending a supplier invitation**, which also shows sending the invitation itself.

INVITATIONS & VENDOR PORTAL

Sending a supplier invitation

How to start onboarding and send a supplier a personal link — no account, no password.

Starting point

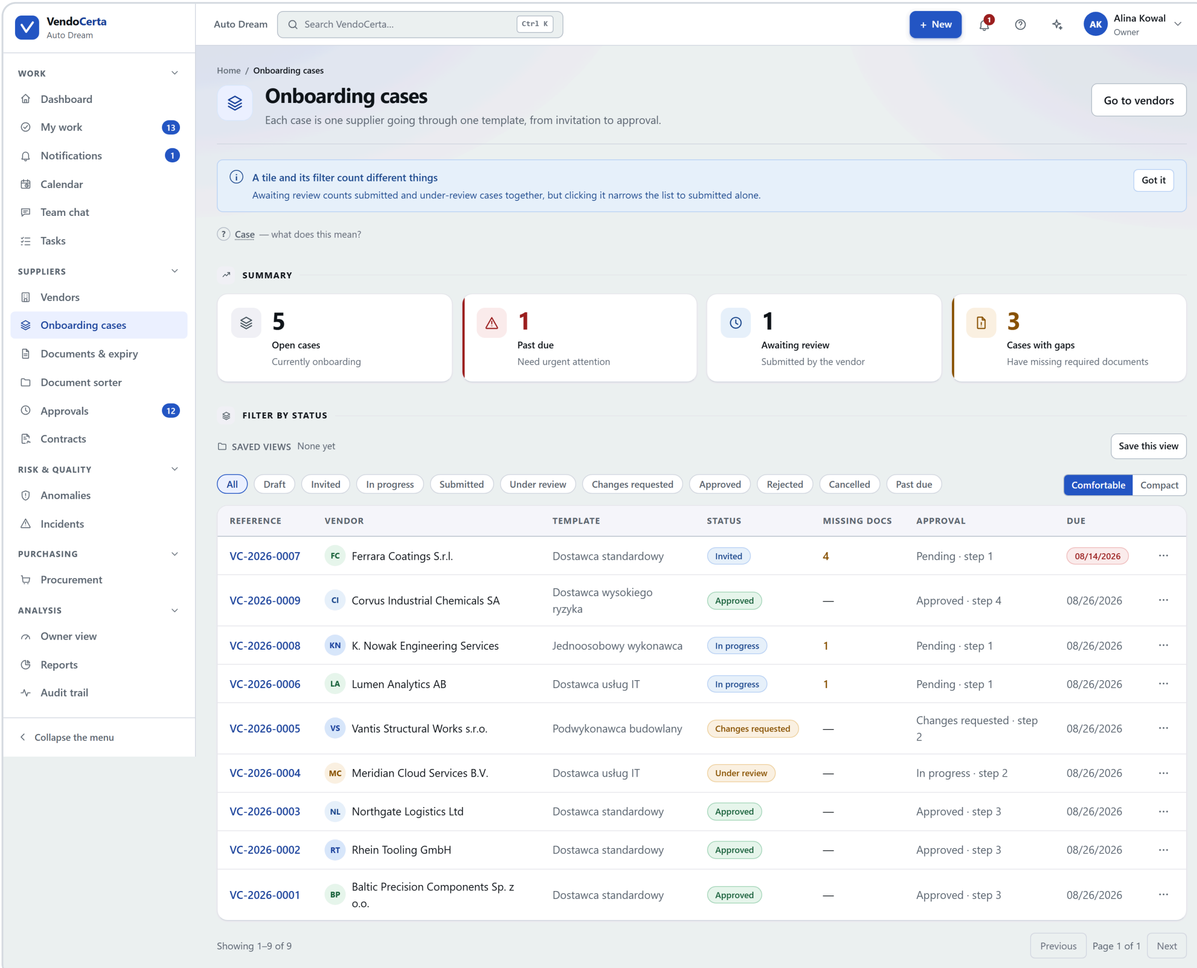
This guide picks up where **Adding your first supplier** leaves off — you already have a saved supplier and an onboarding case started for them (through the **Start onboarding** button on their record). You are now on the case screen, e.g. "VC-2026-0010".

The invitation card

The case screen is split into four steps, listed at the top: **Vendor details**, **Documents**, **Approvals**, **Summary**. There is no right-hand column here — the **Vendor invitation** card takes up the full width and lives in the **Vendor details** step.

If you land on a different step when you open the case, that is not a mistake: VendoCerta opens straight to the step where the case is blocked. Click **Vendor details** to get back to the invitation.

On the card you will see:



The vendor invitation card on a new onboarding case.

1. **Send to** — the supplier's e-mail address. The vendor's primary e-mail on file is suggested by default, but you can change it if the invitation should go to someone else (e.g. the supplier's accounting department).
2. **Language for the supplier** — the form and every e-mail the supplier receives will be in this language. For overseas suppliers, choose English.
3. **Personal message** (optional) — a short line attached to the e-mail above the link. A good place for one sentence of context, e.g. "Hi, let's get the paperwork done before the first order."
4. Click **Send invitation**.

What the supplier gets

The supplier gets an e-mail with a personal, temporary link. They do not create an account and do not set a password — they click the link and land straight on the onboarding form, exactly as defined by the chosen template.

Sending a new invitation

If an invitation already exists (say, the supplier lost the e-mail, or the link expired), the form is not shown at all. The card shows a summary of the live invitation — who it went to and when — and a **Send new invitation** button.

Only after clicking that button does a panel with the form open, and its heading carries a warning: "An active invitation already exists. Sending a new one immediately invalidates the old link." That is deliberate security behaviour: only one valid link to a given case can exist at any moment, so the old one automatically stops working.

Invitation history

In the **header of the invitation card** is an **Invitation history** link that opens a side panel. It shows every invitation ever sent for this case — to whom, when, and whether it is still open. This is the first place to check whether the supplier has opened the link at all.

Where to go next

Once the supplier starts uploading documents, move on to **Checking documents** — that is where you will find out what accepting them looks like.

DOCUMENTS

Checking documents

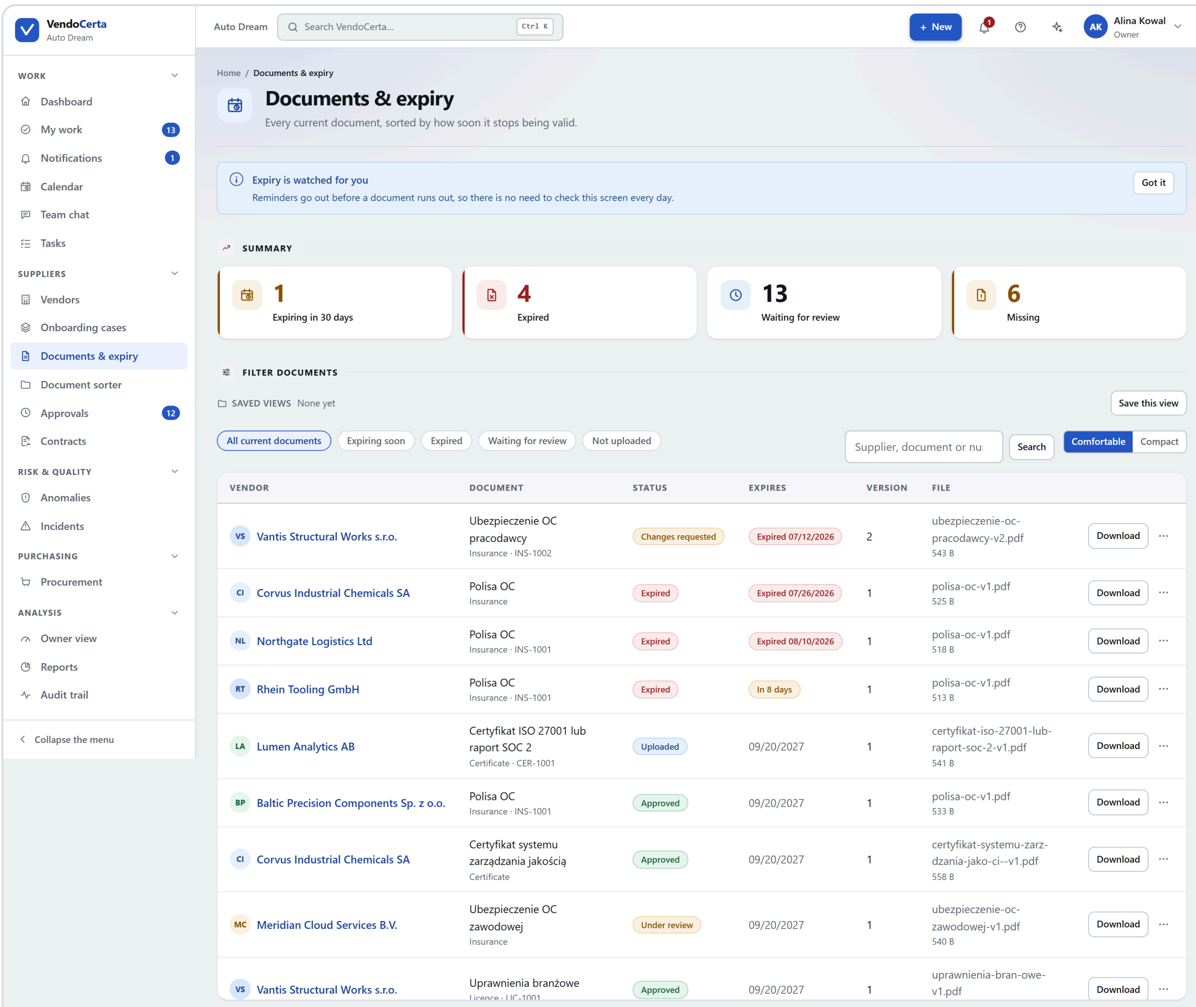
The collective view of documents and deadlines, and how to accept, request a correction, or reject.

Two places, two views

VendoCerta shows documents two ways: **collectively**, on the **Documents & expiry** screen (every supplier at once, by expiry date), and **within a specific case**, where you actually make the decision about a given document.

The collective view

In the left-hand menu click **Documents & expiry**. You will see four counters at the top (Expiring in 30 days, Expired, Awaiting review, Missing) and a filterable list of every current document, with its status, expiry date and version.



The Documents & expiry screen — every supplier at once, by expiry date.

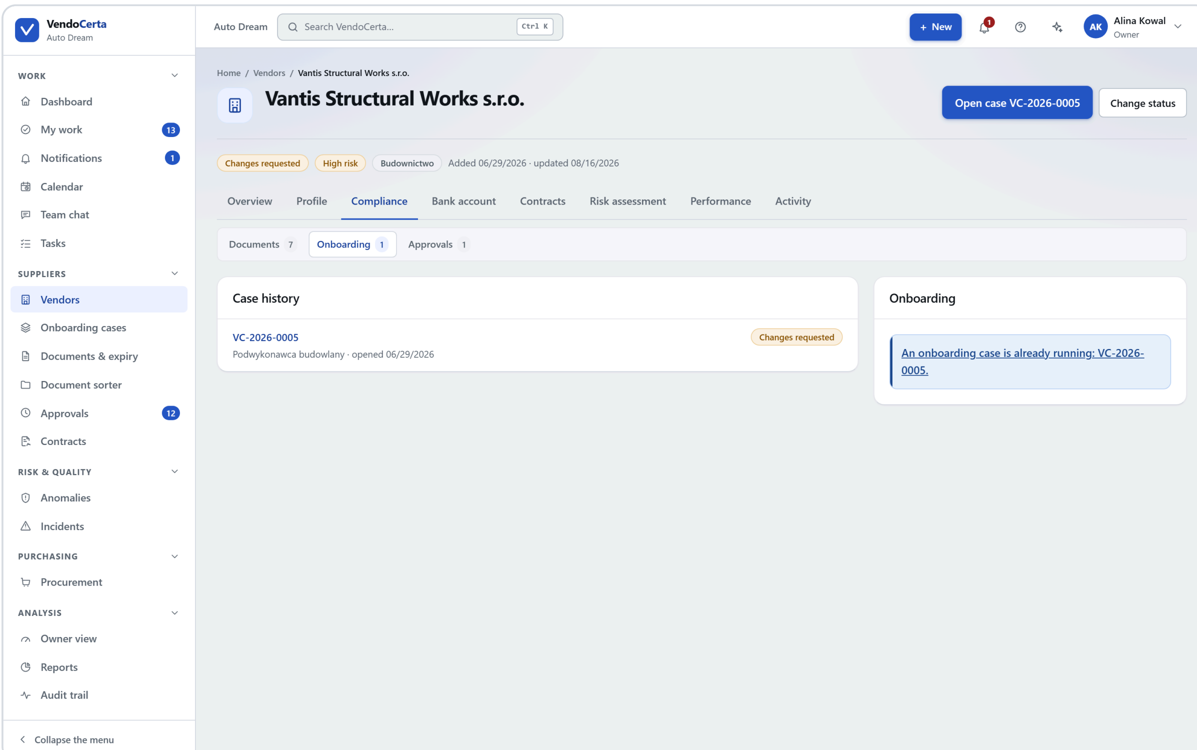
This is the best place to check every so often what is about to expire — VendoCerta sends automatic reminders anyway (30, 14, 7 and 1 day before the deadline, and after it), but this view lets you get ahead of the problem.

The decision, within a specific case

To actually accept or reject a document, open the supplier's case (**Onboarding cases**, or straight from the supplier's own record) and go to the **Documents** step — the case screen is split into four steps, and document decisions happen in this one.

Next to each uploaded document you will see its status, and usually three buttons: **Accept**, **Request a correction**, **Reject**. Two exceptions where the number of buttons changes:

- A document already **accepted and still valid** has no buttons at all — there is nothing to do there.
- A document accepted but **expired** has two: "Accept" is deliberately unavailable, so nobody extends its validity with a single click without a new file from the supplier.



A decision on a single document within a supplier case.

- **Accept** — the document meets the requirements, the step can move forward.
- **Request a correction** — the supplier gets an e-mail with your comment and can upload a corrected version. The previous version is never overwritten — it stays in the history.
- **Reject** — the document is not right; as with a correction, the supplier sees the reason.

Documents marked **Restricted** (e.g. bank account confirmation) are additionally sensitive — only roles with the matching permission can download them, and every download is audited separately.

If something is missing

The top of the case screen always shows a plain list of what **exactly** is blocking approval — missing fields, documents not yet uploaded, unresolved steps. You never have to guess.

The "Progress" card

Three counters — how many questions have an answer, how many documents are accepted, and how many approval steps are complete — sit on the case's last step, **Summary**, full width. You will not see them from the Documents step, where you are actually doing the checking; to judge how close to finished a case is, go to Summary.

Where to go next

Once every required document is accepted, the last step is **Approving a supplier**.

APPROVALS

Approving a supplier

The approval queue, the step path, and why one person can't do it all alone.

How the system knows who can approve

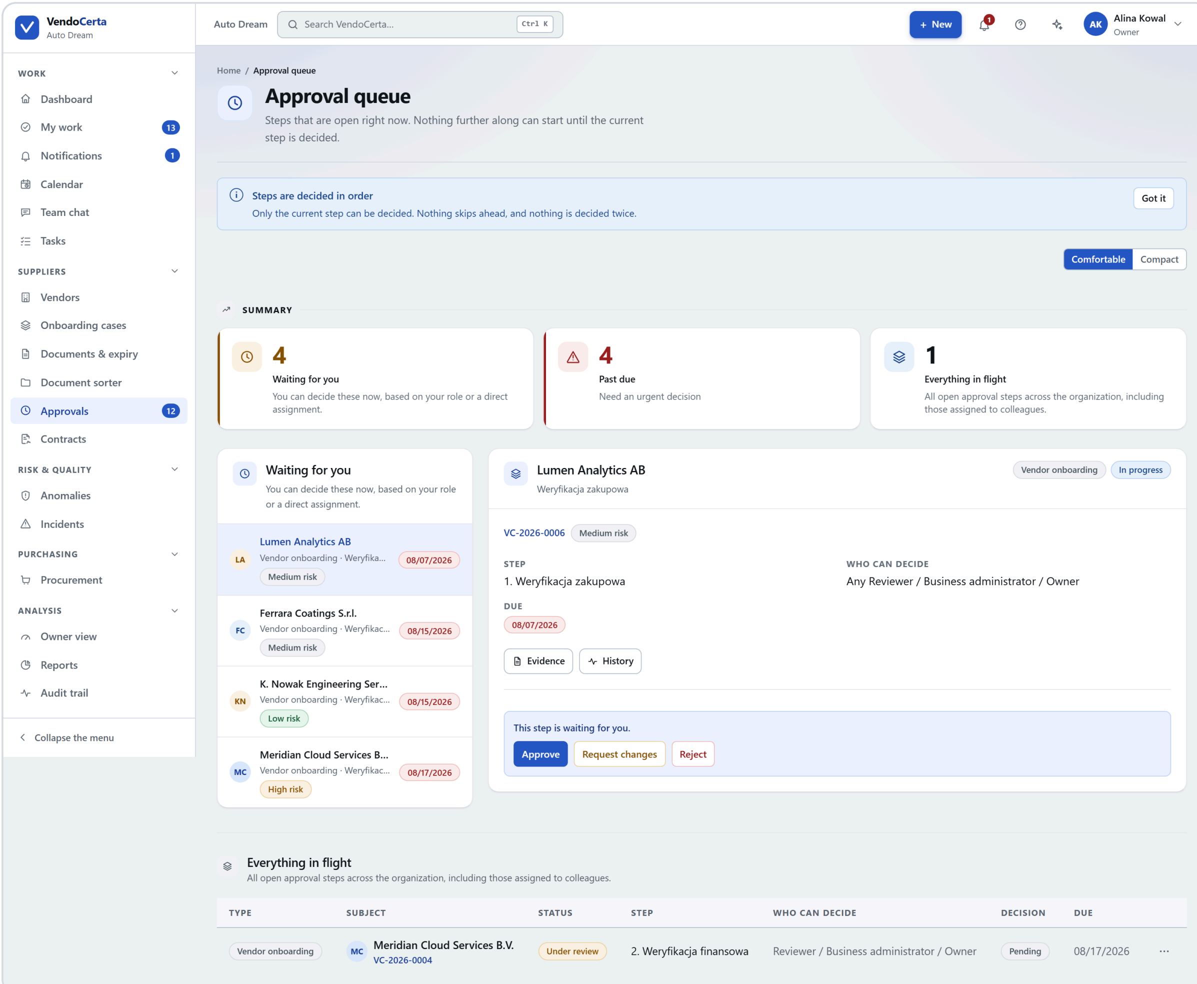
Every onboarding template has a defined **approval path** — one or more steps, each stating which role can decide it (e.g. "Anyone holding the role: Reviewer / Administrator / Owner"). Steps are decided **in order** — the next one will not open until the previous one is approved, and the required document must be current and accepted, or the system will refuse approval and say exactly what is missing.

The approval queue

In the left-hand menu click **Approvals**. At the top are three counters: **Waiting on you**, **Overdue** and **All in progress**.

Below them, two lists:

- **Waiting on you** — steps you can decide right now, based on your role or a direct assignment. This is a plain list of links, no table: it is your queue for today, not a set to compare columns in.
- **All in progress** — a table of every open step across the whole organisation, including those assigned to colleagues.



The approval queue — steps awaiting a decision.

Click an item in the queue. On a wide screen (roughly 1366 pixels and up) you **do not leave the Approvals screen**: a decision panel opens beside the queue with what you need to decide, so you work through items one after another without going back and forth.

On a narrower screen, the **Open** link takes you to the case. There is no right-hand column there: documents, submitted information and the approval path are three separate steps of the case — **Documents**, **Vendor details** and **Approvals**, respectively.

Making the decision

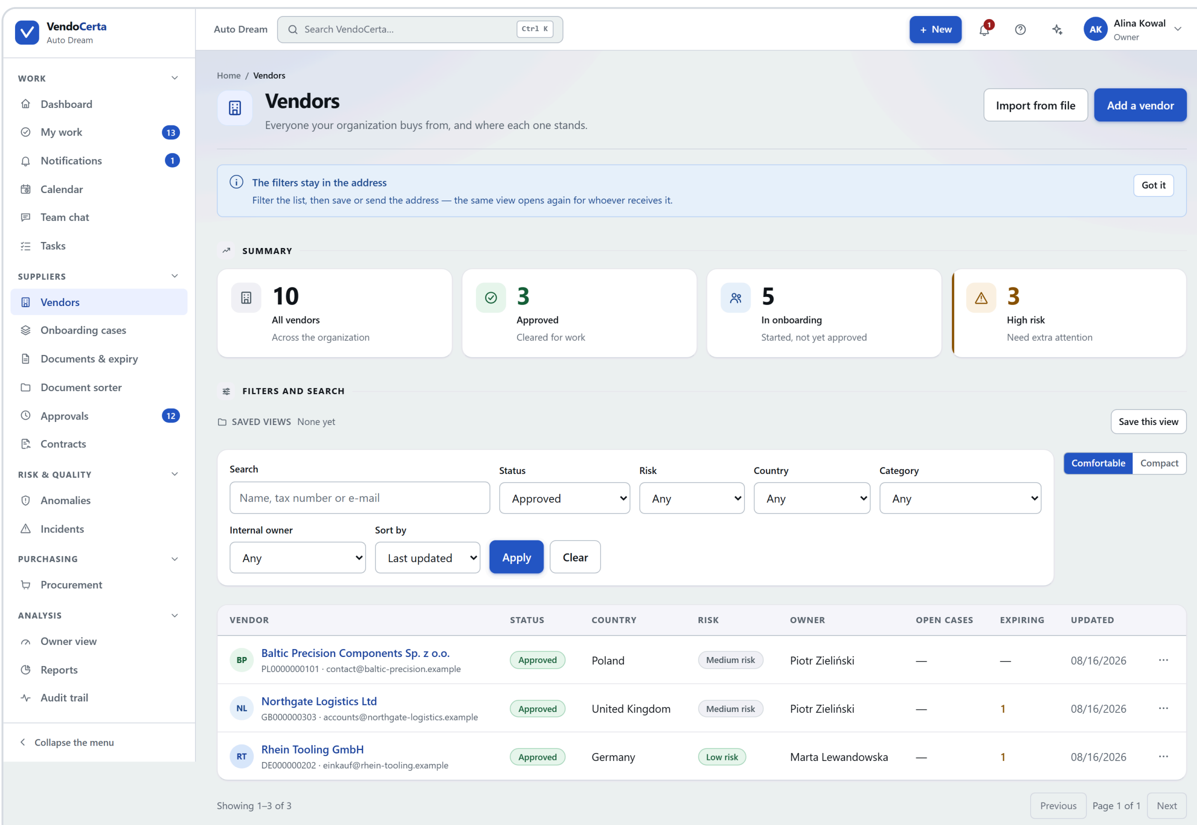
On the case screen, on the **Approval path** card, you see exactly which step you are at and who can decide it. Approving a specific step happens from that same screen, after checking the required documents and fields — see the **Checking documents** guide.

One person cannot do it all alone

This is one of VendoCerta's more important rules: if a process requires more than one approval step, **the person who added the supplier or checked their documents does not have to be the same one making the final decision** — and in some configurations (for example, a bank account change) the system actually requires it. This is not friction — it is protection against mistakes and abuse that would easily go unnoticed if one person acted alone.

After approval

The supplier's status changes to **Approved**, visible immediately on the vendor list and on their record. An approved supplier has the full set of actions unlocked on their record — including proposing a bank account change in the future, should the need arise.



A supplier's record after approval.

If a decision needs to be reversed

A supplier's status can be changed by hand at any time with the **Change status** button on their record (e.g. to suspend the relationship) — this is a separate action from the case approval process itself, and always leaves a full trace in the audit trail.

That's the basic path complete

You have gone the whole way: adding a supplier, inviting them, checking their documents, and approving them. From now on VendoCerta watches document expiry dates for you — and you go back to the dashboard to see who is next waiting on a decision.

TEMPLATES

Creating an onboarding template

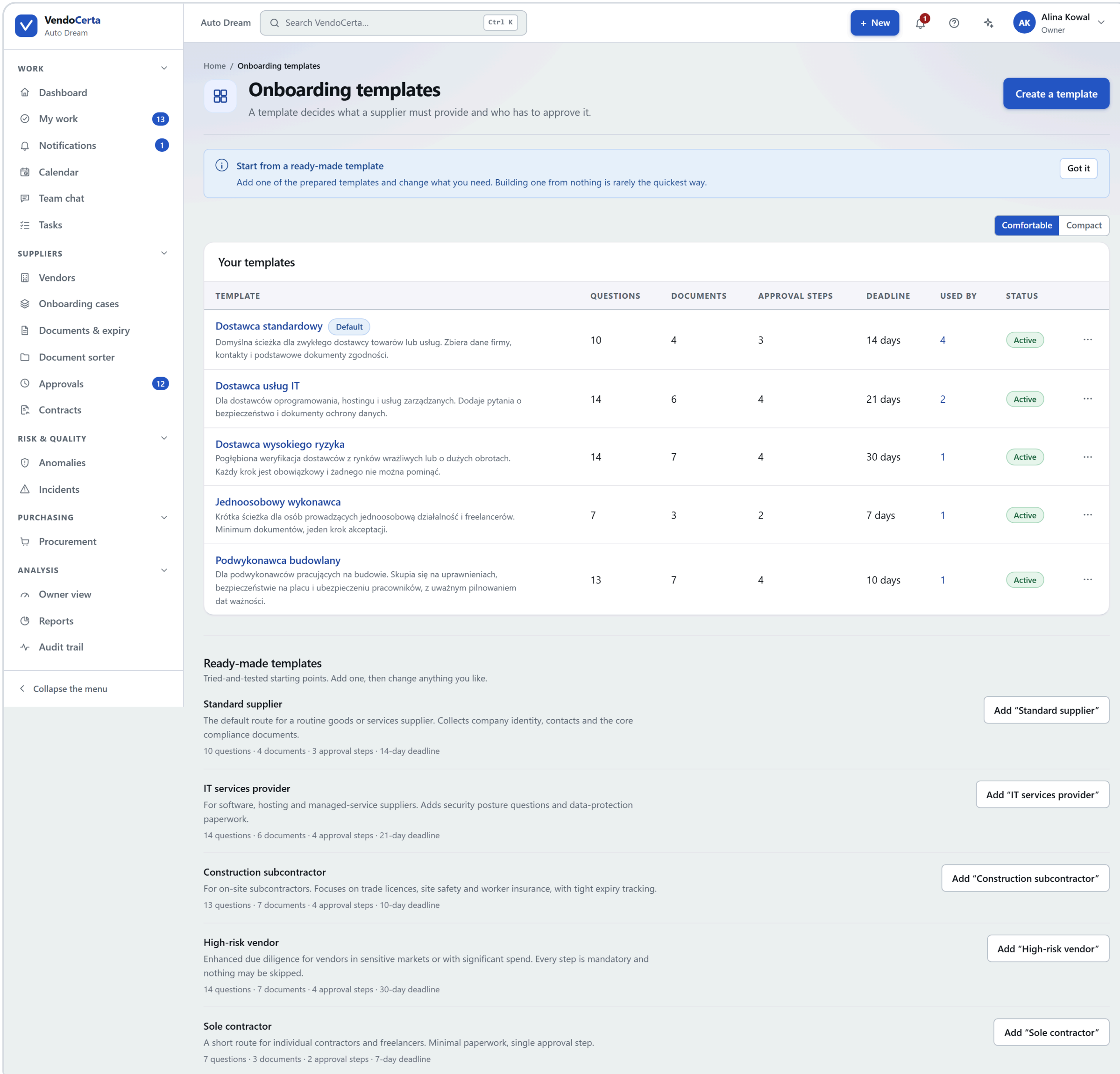
How to build a template: questions for the supplier, required documents, and approval steps in order.

A template is an onboarding scenario: which questions VendoCerta will ask the supplier, which documents it will request, and who has to approve it, in what order. When you start onboarding for a specific supplier, you choose one of your templates — from that moment the case has its own, frozen copy of those requirements, so a later edit to the template does not change anything retroactively, only cases started from then on.

Where to find it

In the left-hand menu, under **"Administration"**, click **Templates**, then **Create template** in the top right corner.

The coloured banner with an icon and "pills" is no longer on this screen. The four reminders of what you will set up here — questions for the supplier, the document list, approval steps in order, and the deadline and reminder days — have moved **behind the question mark in the top bar**, along with the rest of this screen's help.



The empty Create template screen, with the Basics section.

In that same help behind the question mark is advice worth reading before you start: if what you are building resembles one of the ready-made templates on the **Templates** list, it will be faster to add that one and adjust it than to start from a blank page.

Basics

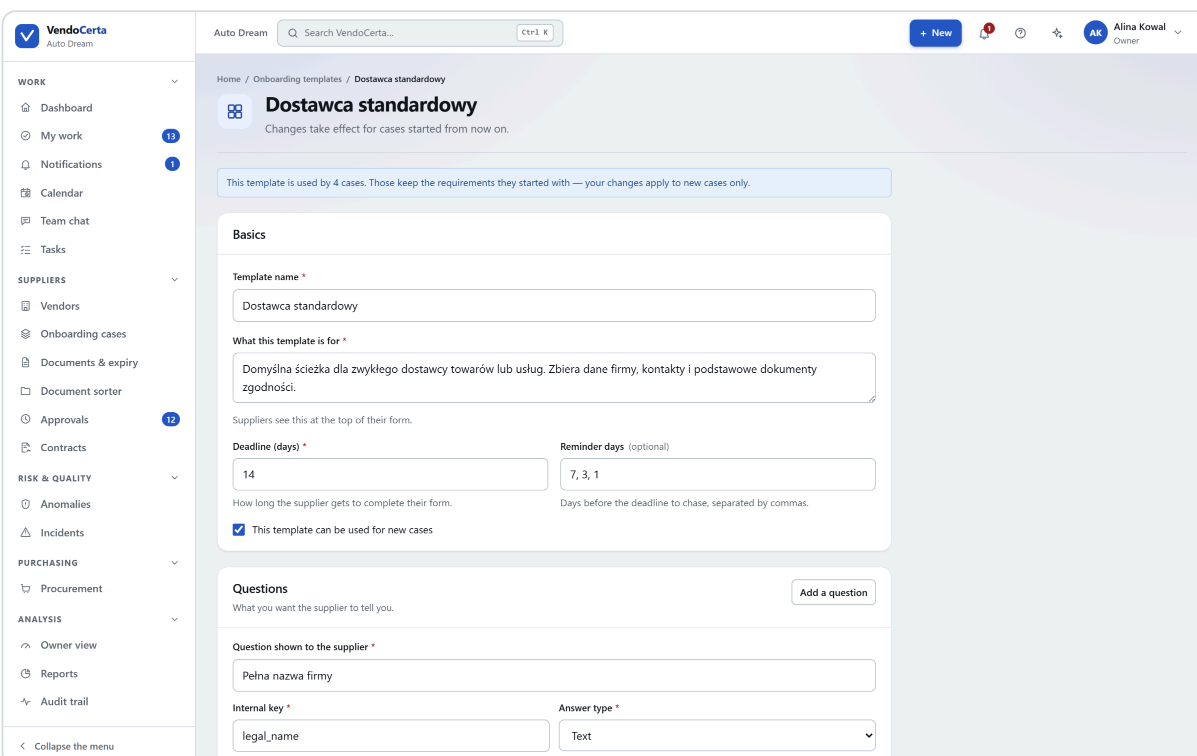
- **Template name** — not just an internal label on the template list: the supplier sees it as the heading of their form, so it is worth writing it in a way that makes sense to them, not only to you.
- **What this template is for** — appears right under the name, as a subtitle on the supplier's form.
- **Deadline (days)** — how many days the supplier has to fill in the form, counted from when the invitation is sent (1–365).

- **Reminder days** — a comma-separated list of numbers, e.g. "7, 3, 1" — this many days before the deadline VendoCerta will remind the supplier.
- **This template can be used for new cases** — unchecking this box does not delete the template, it only hides it from the selection list when starting a new onboarding.

Questions for the supplier

The **Questions** section starts empty — "A template can require documents only, if that is enough." Clicking **Add question** gives you a row with fields:

- **Question text shown to the supplier** — the exact wording they will see.
- **Internal key** — a technical identifier for the answer (lower case, digits, underscores); the supplier never sees it.
- **Answer type** — Text, Long text, Number, Date, E-mail, Phone, Website, Single choice, Multiple choice, Yes / no, or Country.
- **Section heading** — questions sharing the same heading are grouped together on the supplier's form (e.g. "Contact", "Registration details").
- **Possible answers** — appears only for "Single choice" and "Multiple choice"; you type the options separated by commas.
- **Help text** — an optional clarification below the field.
- **Supplier must answer** — uncheck if the question should be optional.



Adding a question and a document requirement to the template.

Required documents

The **Documents** section works the same way — **Add document** adds a row with a name, category (Registration, Tax, Insurance, Certificate, Licence, Declaration, NDA, Payment details, Other) and instructions for the supplier. Checkboxes decide what VendoCerta additionally asks for with this document:

- **Required** — without it the case cannot be approved.
- **Ask for document number / issue date / issuing country** — extra metadata collected when the file is uploaded.
- **Ask for an expiry date (turns on reminders)** — once checked, a **Warn this many days before expiry** field appears, which drives reminders and the "Documents & expiry" view.
- **Contains banking or other sensitive data** — restricts who on your team can even open the uploaded file (e.g. a bank account number).

Approval steps, in order

A new template starts with one ready-made step ("Procurement review" — checks commercial terms, 3 days, role Reviewer/Administrator/Owner), because VendoCerta requires at least one. **Add step** adds another, with fields: name, how many days for a decision (1–90), what this step checks, and a set of checkboxes, **Roles that can decide this step** — you must check at least one. Optionally: **An owner or administrator can skip this step**.

The order of rows on this screen is the order the steps will be decided in for every case — step 2 will not unlock until step 1 has a decision. More on what this looks like from the other side in **Tracking an onboarding case**.

Saving

At the bottom of the form, click **Create template**. The whole document — basics, questions, documents and steps — saves as one unit and is validated on the server, so there is no risk of a partially saved template. Once saved, you land on that template's page.

Where to go next

The new template will appear on the **Onboarding template** selection list when starting onboarding for a supplier. See **Sending a supplier invitation** to find out what happens next — and remember that editing this template later will not change cases already started, only the ones that begin from then on.

Tracking an onboarding case

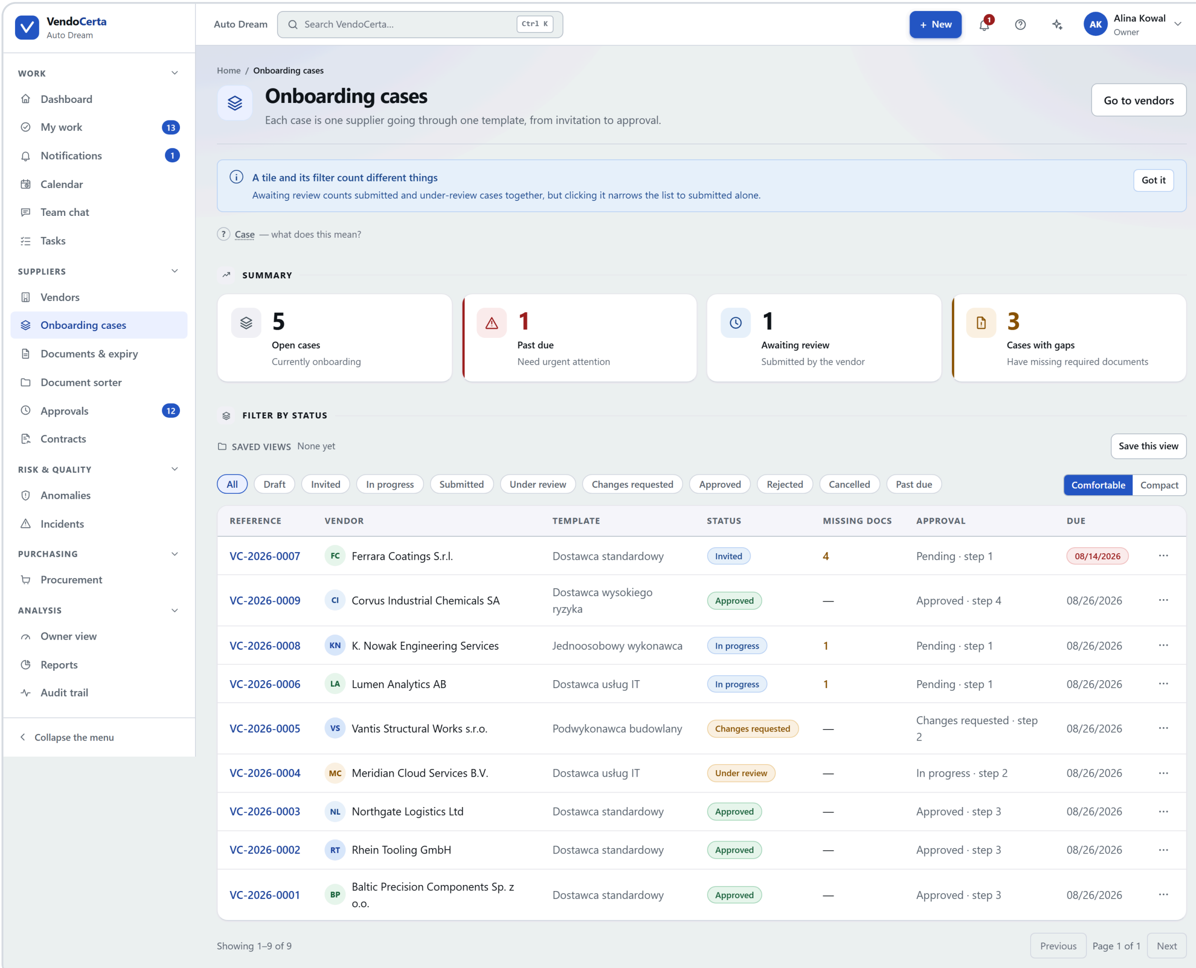
How to read a single case screen: blockers, documents awaiting a decision, progress, and the approval path.

A "case" is created the moment you click **Start onboarding** on a supplier's record. From that point on it is the case screen — not the supplier's record — where you actually see what stage things are at: what the supplier has already filled in, which documents are waiting on your decision, and who else still has to weigh in before the supplier can be approved.

Where to find it

In the left-hand menu click **Onboarding cases**, then any reference in the format "VC-2026-00XX" on the list. At the top of the screen is a header with the supplier's name, the case number, and a **Vendor record** button in case you want to go back to the supplier itself. Below it a row of badges: case status, the **template name** the case uses, the deadline, and then the dates it was opened and the invitation sent.

The whole screen is split into four steps: **Vendor details**, **Documents**, **Approvals** and **Summary**. VendoCerta opens straight to the step where the case is blocked, so you will not always land on the first one.



The case header, status, and the list of things blocking approval.

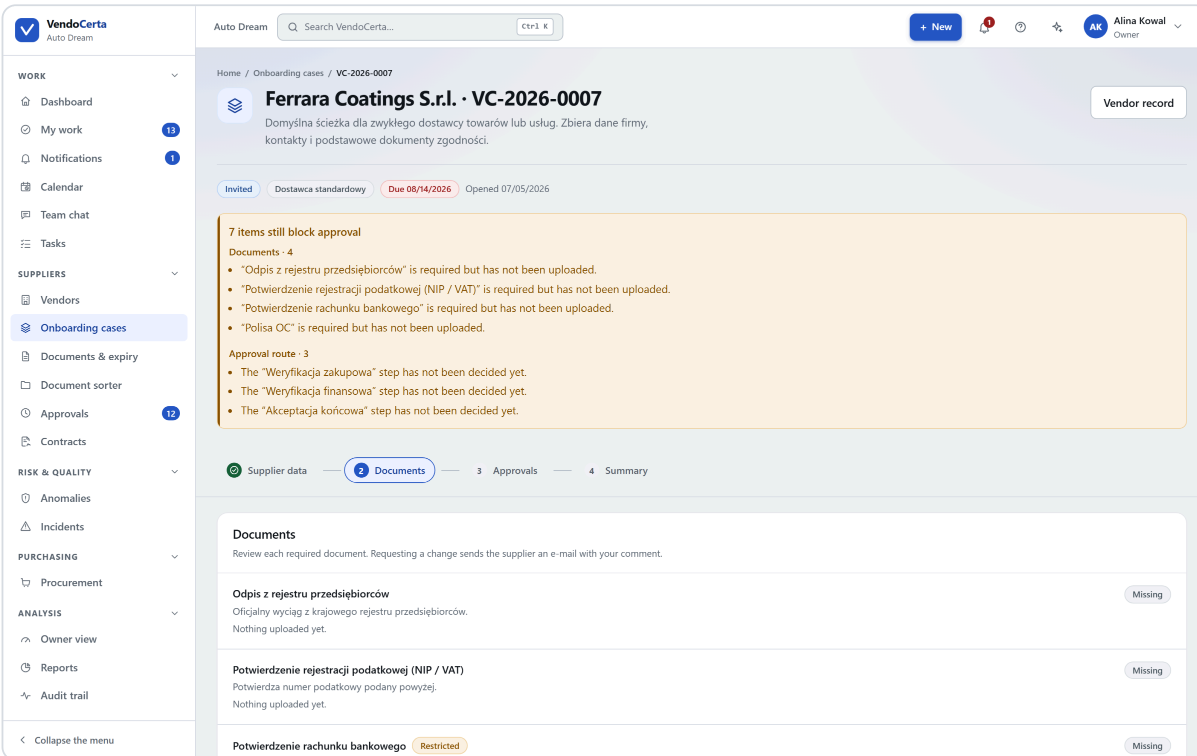
What is blocking approval

Right under the header is one of two messages: a green "Ready to approve", or an orange list of specific blockers — e.g. "The document 'Bank account confirmation' is required but has not been uploaded" or "The step 'Finance Review' has not been decided yet". Blockers are grouped into three kinds — documents, submitted information, and the approval path — and **each group on its own** shows at most 5 items, appending "...and X more" at the end. This is exactly the same list the AI assistant knows when you ask it "Why can't I approve this vendor?"

Documents

Every required document is its own row: name, description, and — if something has already been uploaded — who, when, which file, its document number and expiry date. The badge on the right says what stage the document is at. There are eight statuses: "Missing", "Submitted", "Under review", "Needs correction", "Approved", "Rejected", "Expired" and "Superseded". If you hold the permission to review documents, decision buttons appear right away under a document awaiting a decision — no switching screens required.

A document marked with a "Restricted" badge contains sensitive data (e.g. a bank account number) — if your role does not have access to it, VendoCerta says so plainly instead of just hiding the download button.



A document needing correction with its decision buttons, and the approval path.

Older versions of the same document do not disappear — a "Version history" disclosure below shows all of them, each with its own download link.

Submitted information

Further down, on a separate card, are the answers to the template's questions — exactly what the supplier typed into their form. Required questions carry an asterisk; an unanswered optional field shows "No answer" instead of a blank space.

Progress

The **Progress** card sits on the last step, **Summary**. It starts with a progress bar and three counters: **Answers** (how many required questions have an answer), **Accepted documents** and **Completed steps** — each in the format "done out of required".

The percentage on the bar is **not** an average of these three numbers. It is a single ratio: answers and accepted documents together, divided by required fields and required documents together. Approval steps do not feed into it at all — which is why a case can show 100% while a step is still undecided.

Approval path

The template's steps appear here in order, with a role (or a specific person), a deadline and — once someone has decided — who, when and with what comment. Steps are decided strictly in order: until step 1 has a decision, the decision buttons for step 2 will not appear, even if you hold the permission for it. "Request changes" on a step does not close the case — it sends the supplier a request for a correction and the case goes back to them, but the approval path stays where it was, so you do not start over after the correction.

The invitation and its history

If you hold the permission to send invitations, you will see a panel with the current state ("Link open" or "Invitation sent", with the dates it was sent and expires) and a form to send a new one — remember that a new invitation immediately invalidates the previous link. The full **Invitation history** — every link ever sent, with its date and identifier — opens from a link in the **header of this card**, on the Vendor details step.

Where to go next

At the bottom of the **Summary** step is a **View this case's audit history** link — it opens the **Audit trail** screen already filtered to this specific case. Only people with permission to read the audit trail see it. See the **Reviewing the audit trail** guide to find out what to look for there.

BANK ACCOUNTS

Changing a bank account

A controlled change to a supplier's account: proposal, document confirmation, independent verification, and approval.

A fake "our account number has changed" message is one of the oldest tricks for redirecting a payment — which is why changing a supplier's bank account is deliberately slow in VendoCerta.

Instead of one click there is a four-stage procedure: **proposal → document confirmation → independent verification → approval**.

It is worth knowing the separation-of-people rule precisely, because it is gentler than four stages might suggest. The same person **can** confirm the document and carry out the independent verification, and can even cast the **first** approval. There is one hard condition: **nobody** who has already appeared in this case can give the **final** approval — not the person who proposed the change, not the one who confirmed the document or verified the details, and not anyone who approved earlier.

In practice this guarantees a minimum of **two different people** when one approval is required, and **three** when two are required.

Where to find it

Open the supplier's record (**Vendors** → pick a supplier) and go to the **Bank account** tab. It is a separate tab of the record, filling its full width — not a card in a right-hand column. If the supplier has never had an account on file, you will see "No bank account on file" and an explanation that a proposal can only be made once a bank-confirming document has already been uploaded. If an account already exists, the card shows it right away — the account holder's name, the last 4 digits of the number, country, bank, and the date it took effect.

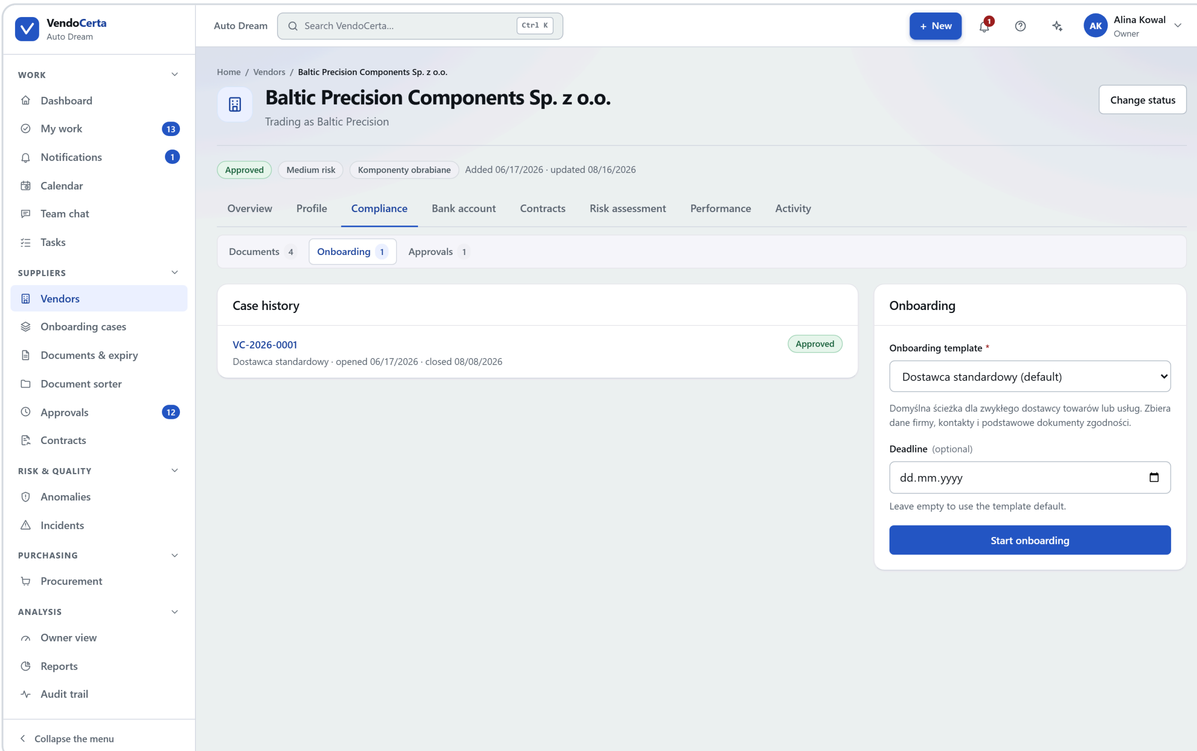
Before you start: a document is required

The **Propose a change** button stays disabled until this supplier has an **uploaded** document in the "Payment details" category (for example, required by the template as "Bank account confirmation"). That document is the "evidence" the rest of the procedure refers back to — you cannot propose an account out of nowhere.

One thing deserves emphasis, because it is easy to build a false sense of security on it: it is enough for the document to **exist** and have a current version. The system does **not** require it to be already accepted. Checking whether the bank confirmation is genuine is the job of the person confirming the document in step 2 — that is exactly what that step is for.

Step 1: proposal

Only an **Owner** or **Administrator** can propose a change — deliberately not a Reviewer, so the same person cannot easily walk through several stages at once. The **Propose a bank account change** form asks for: the account holder's name, country, number type (IBAN — genuinely validated, or a local account number — only its shape is checked), a supporting document chosen from what is already uploaded, the account number, and — on purpose — that same number typed a second time, as a simple check against a mistyped digit. SWIFT/BIC and the bank's name are optional. Once sent, the status changes to "Awaiting document confirmation".



The new-account proposal form, next to the current account.

Step 2: document confirmation

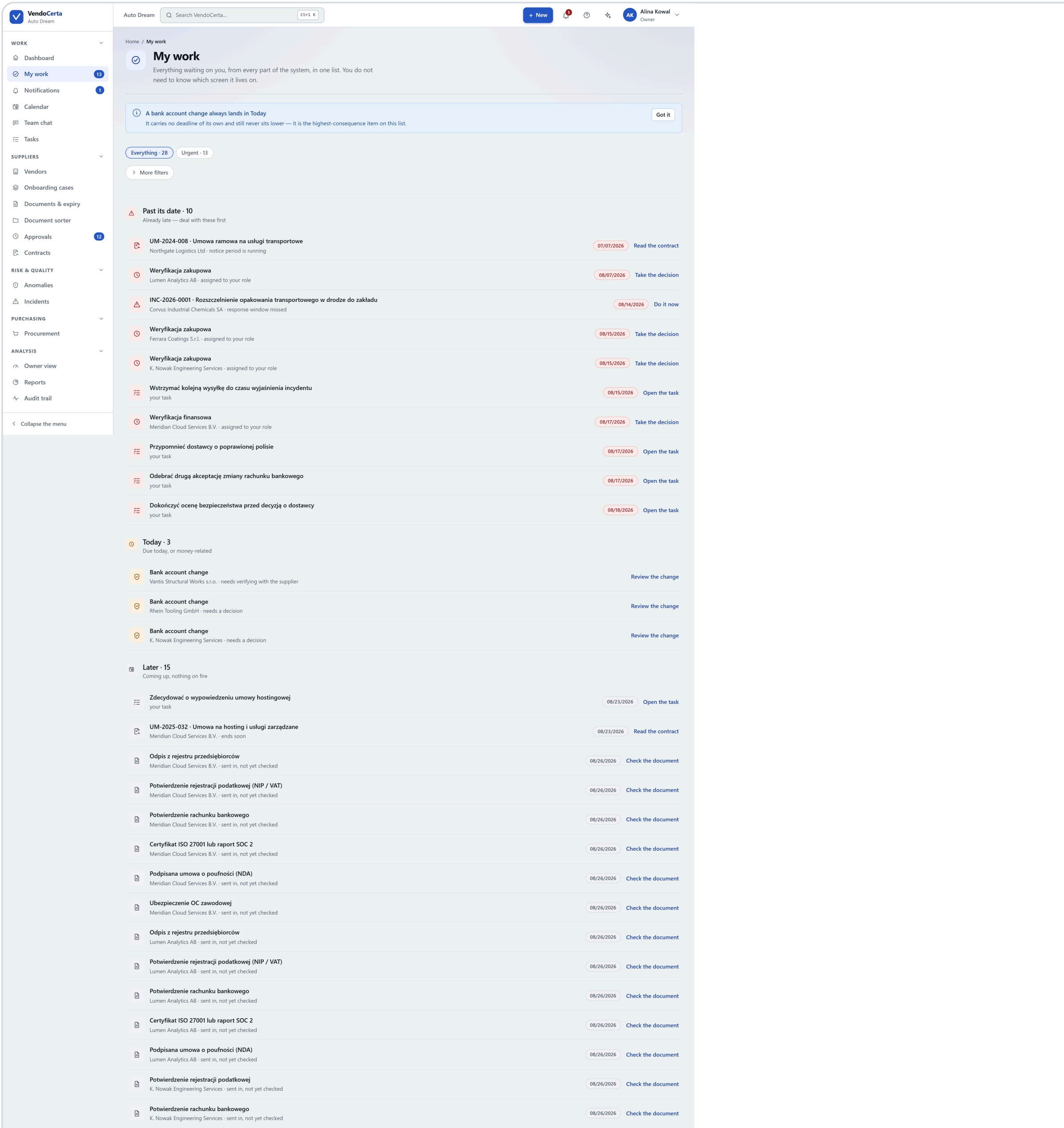
Someone other than the person who proposed it — a Reviewer, Administrator or Owner — opens the same record and, with one click on **Confirm it matches the document**, states that the details on screen match the uploaded file. The status moves to "Awaiting independent verification".

Step 3: independent verification

Another person — again, someone other than the one who proposed it — records how they independently verified the new details, choosing a method: **calling back a known contact** (deliberately phone only, never e-mail — because the e-mail account may be exactly what an attacker has compromised), **a confirming letter from the bank**, **a signed power of attorney**, **an in-person meeting**, or "other", plus optional notes and a reference number. The status moves to "Awaiting approval".

Step 4: approval

By default **two** independent approvals are needed (the number is changed in Settings), and every approval or rejection is shown alongside a progress bar like "0 of 2 approvals". If VendoCerta has detected that the same account number is already assigned to another supplier, a duplicate warning appears that has to be knowingly dismissed before approval becomes possible at all. On the second, final approval the rule is even stricter: neither the person who confirmed the document nor the one who verified it can cast that last vote — so sometimes a genuinely fourth, previously uninvolved person is needed. Only a complete set of approvals turns the proposal into the active account; the previous one automatically moves into the history as "superseded".



A change in progress, awaiting approval, with Approve/Reject buttons.

Cancelling, and viewing the full number

The person who submitted the proposal can cancel it themselves at any point before a decision is made — the **Cancel** button is visible only to them. The full account number (not just the last 4 digits) can be viewed with the **Show full number** button, but this requires a separate permission, a stated reason, and re-entering your password — and the number itself disappears from the screen after 45 seconds.

Where to go next

The collapsible **History** section at the bottom of the card keeps every previous account this supplier has had — superseded, rejected or cancelled, with its date. Every step of this procedure — proposal, confirmation, verification, decision — is also recorded in the supplier's **audit history**.

AI ASSISTANT

Using the AI assistant

What the assistant available on every screen can do, how its proposals work, and when it hands things to a human.

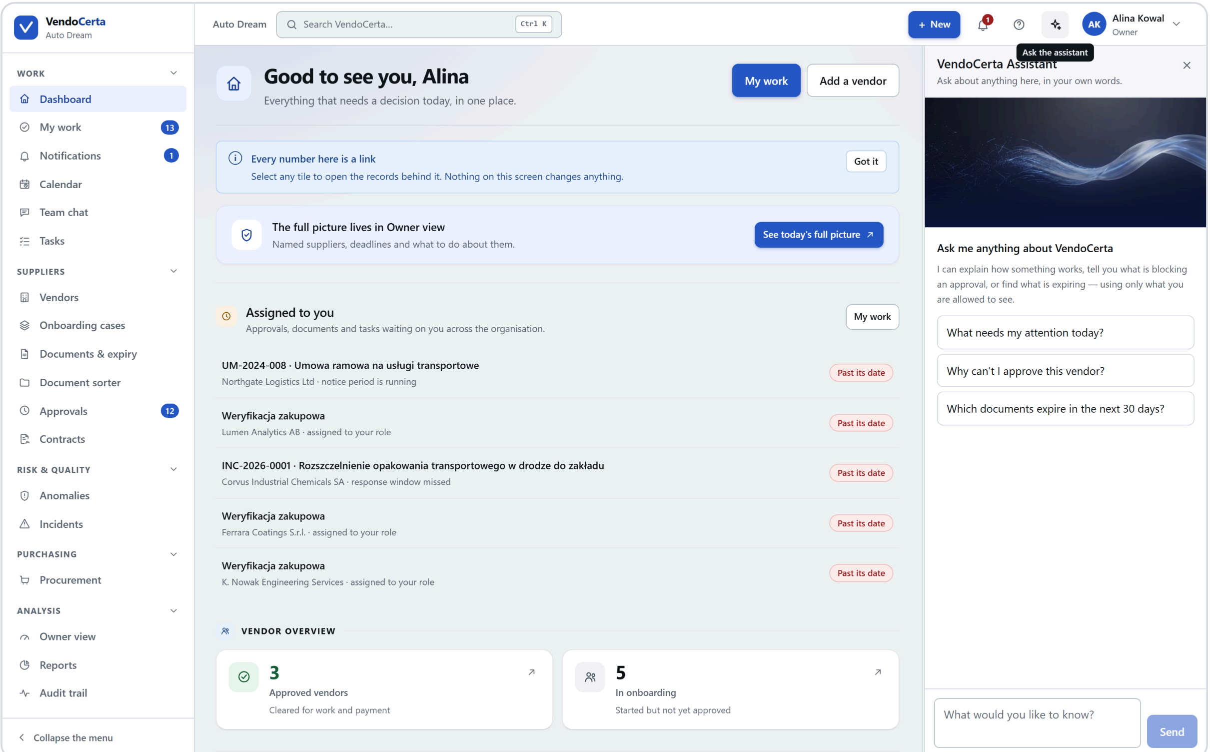
The assistant is called up from every VendoCerta screen. On a normal, wide screen it is the **sparkle icon in the top bar**, next to the question mark. On a narrow one — a phone, for instance — a blue circle in the bottom right corner. Either way, the tooltip under the cursor says "Ask the assistant".

It is a built-in assistant that knows the product (the manual) and, within the limits of your own permissions, your data: suppliers, cases, documents, deadlines. Nothing needs to be switched on or configured to use it.

Where to find it

Click the assistant's icon. On a wide screen the panel **docks as a column beside the content** — deliberately beside it, not on top, so you can still see the screen you are asking about. The column's width can be dragged. Only when there is not enough room does the panel cover the content.

Either way there is no switching screens involved. If you have not talked to it before, you will see a short explanation and a few sample questions matched to wherever you are — e.g. "What needs my attention today?", "Why can't I approve this vendor?" or "Which documents expire within 30 days?". You can click one of these, or just type your own question at the bottom of the panel.



The assistant panel with sample questions.

The assistant knows which screen you are on (and, e.g., which case it concerns) because it reads that from the page address itself — you do not need to repeat it in your question. That is why "why can't I approve them?" works without naming the supplier, if you are already on their record.

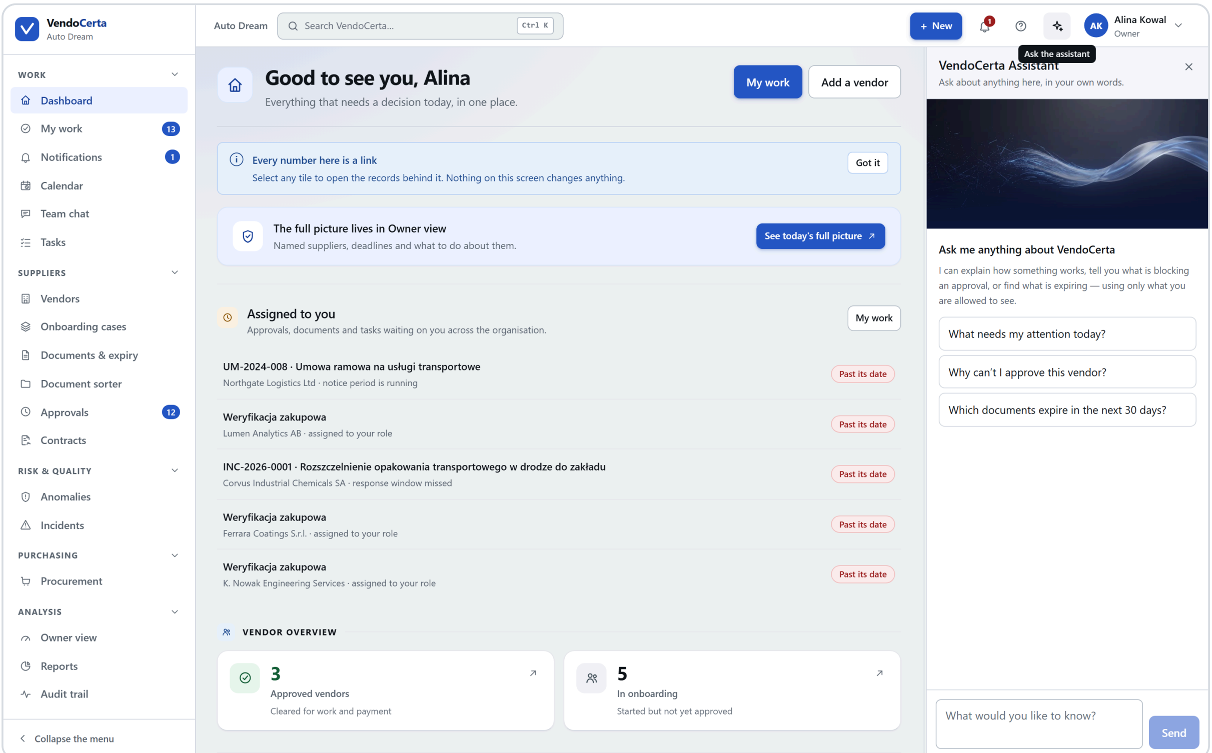
Three kinds of question

- **"How do I do something?"** — an answer drawn from the product manual, in your own language, often with a link straight to the right screen.
- **"What's happening with...?"** — an answer drawn from your own data: what is blocking approval, what is expiring, what is waiting on your decision, what is overdue.
- **"Will you do this for me?"** — the assistant does not make the change immediately. It writes down exactly what it would do, and waits for your decision.

An answer often ends with a collapsible "Based on" — a list of the sources (manual excerpts or specific records) the assistant relied on — plus a few buttons suggesting the next question.

How proposals work

Ask, say, "How do I invite this supplier to onboarding?" on a case screen with no active invitation, and instead of just an explanation you get a **Shall I do this?** card with a specific summary ("Send an invitation to [name] at [e-mail]"), a list of what will happen ("An e-mail will go to that address", "It contains a private link to the form, valid for a limited time", "This will be recorded in the event log under your name"), and two buttons: **Yes, do it** and **No, leave it**.



The assistant's proposal with its list of effects and decision buttons.

What matters is what happens between the proposal being written and you clicking a button: **nothing**. No message is sent, no record in the database changes, until you confirm. If you click "Yes, do it", the assistant carries out exactly what it described — under your name, with an entry in the audit trail — and states plainly what happened (e.g. "Sent. The supplier has the link."). Permissions are checked again at the moment of confirmation, against the person clicking, not the one who asked — so if somebody took your access away in the meantime, the confirmation is refused.

The assistant never approves, rejects or suspends a supplier on its own, never changes anyone's role, and never deletes anything — that always stays with a human, even if you ask it directly.

When the assistant hands things off

Ordinary uncertainty does not yet create a ticket — the assistant simply notes in its answer that escalating is possible. A genuine ticket to the support team (with a readable reference number like "VCA-2026-0007") is created automatically when: you rate an answer with the **Didn't help** button, several tools fail in a row, or the external language model provider is briefly unavailable and the assistant has to fall back to a simpler mode of answering. Administrators see the queue of such tickets under **Administration** → **Assistant settings**.

Where to go next

The **Start a new conversation** button in the panel's header clears the current thread — useful when your question is on an entirely different topic. The same assistant, in a scaled-down form, is also available to a supplier in their onboarding portal — there it answers only about their own case and form.

AUDIT TRAIL

Reviewing the audit trail

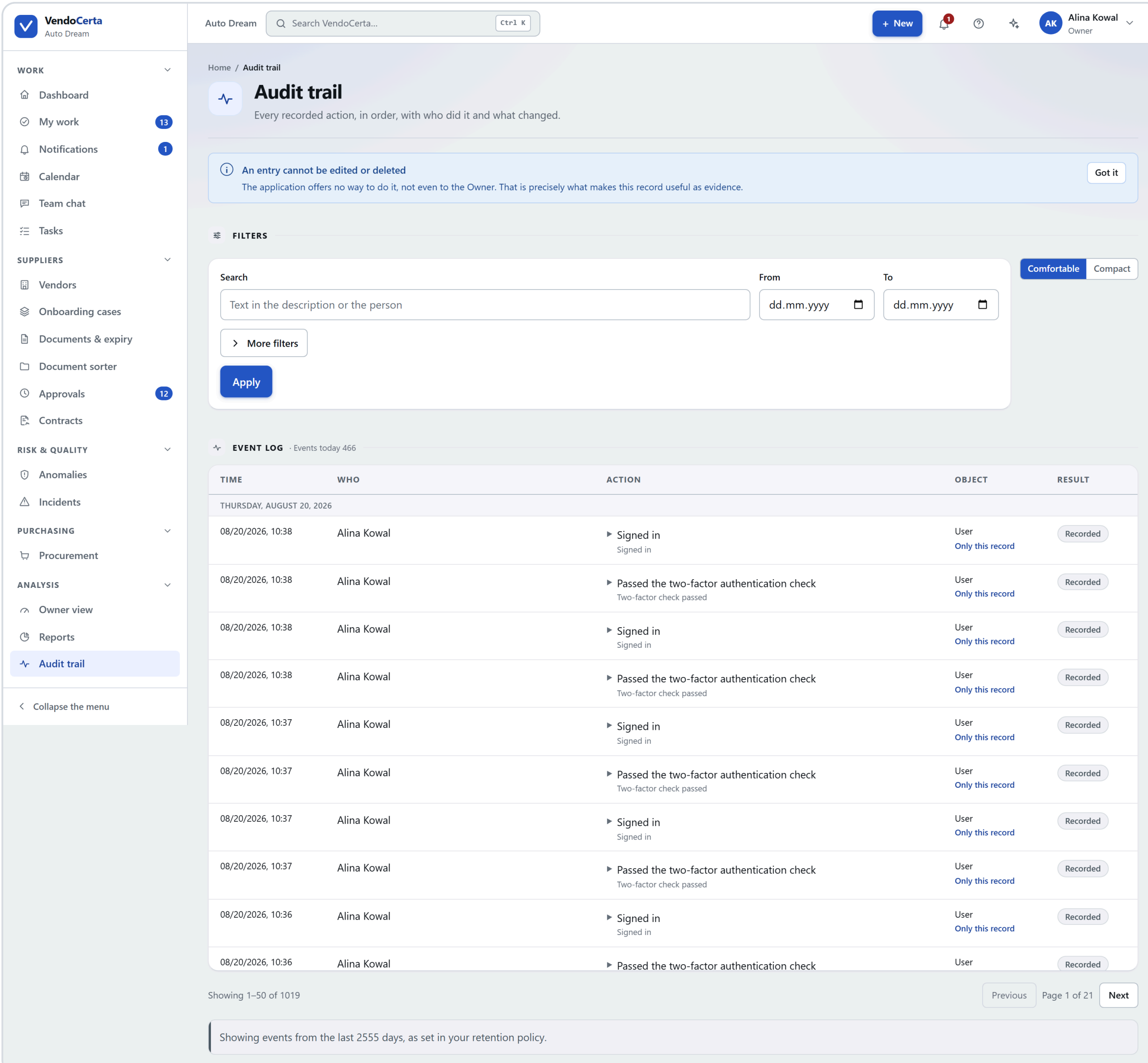
Searching and filtering the immutable event log, and reading before-and-after changes.

Every meaningful change in VendoCerta — a new supplier, a changed status, an invitation sent, a document decision, a sign-in — is recorded as a separate entry in the audit trail. This entry cannot be corrected or deleted from inside the application, not even as Owner — and that is exactly why it makes sense as evidence in an audit or a dispute with a supplier.

Where to find it

In the left-hand menu, under **"Analysis"**, click **Audit trail**.

The coloured banner with "pills" is no longer on this screen — the four reminders of what it can do have moved **behind the question mark in the top bar**. Today they read: "Search in the description, person, record and request identifier", "Filters: category, event type, object and date", "Before-and-after values on every row", "Retention period for records".



The Audit trail screen with filters and the event list.

Search and filters

Above the list is a filter bar. The basic view shows three:

- **Search** — text in the event description, in the person's name, in the record, or in the request identifier.
- **From / To** — a date range.

The remaining four hide behind a collapsible **More filters**:

- **Category** — security, data change, decision, system event.
- **Event type** — a specific type, e.g. vendor status changed.
- **Object** — the kind of record the event concerns: supplier, onboarding case, document, invitation, user, and so on. This selection list is not fixed — it is built from what actually exists in your organisation's log, so it looks a little different for everyone.

- **Person** — a specific team member from the list (not suppliers — your own staff only).

Click **Apply** to filter the list; the parameters go into the page address, so you can send a filtered view to somebody as a link — that is exactly how the "View this case's audit history" link on a single case screen works.

What you see with each event

The log is a five-column table: **Time**, **Who**, **Action**, **Object** and **Result**.

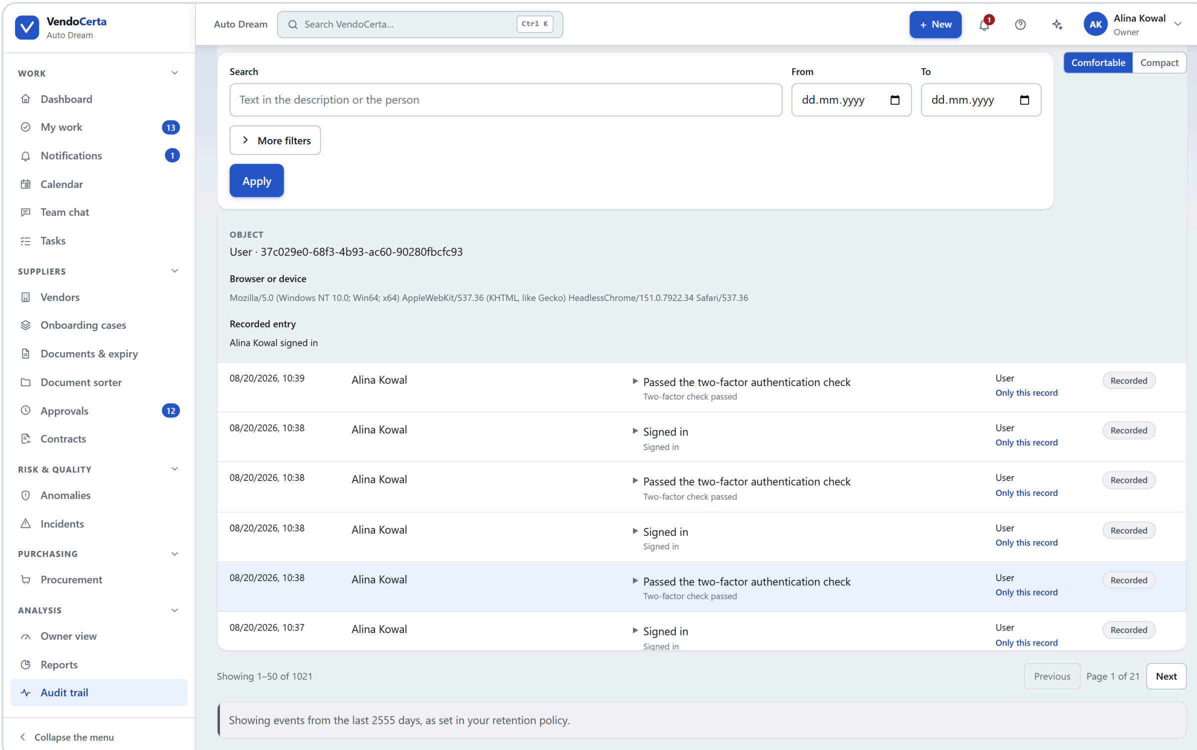
The Action column carries one sentence ("Vendor status: Draft → Invited", "Sent an invitation to..."), and below it — also in your own language — the event's type. The badge on the right is the **result**: "Recorded", "Approved", "Rejected", "Access denied" or "Failed".

The raw, English event-type name has not disappeared — it moved into the expanded row, as **"Event code"**. The IP address is there too, under a **"Source"** heading; it is not on the row itself.

Event details

Clicking an action in a row expands a second row underneath it with the details. This state is saved in the page address (`?event=...`), so a specific expanded event can be sent to someone as a link.

The details show **Before** and **After** side by side, with the raw values of the fields that actually changed (not the whole record) — for example, on a vendor status change, `"status": "DRAFT"` on one side and `"status": "INVITED"` on the other. Next to them: the request identifier, the source with its IP address, the browser, the event code and metadata.



An expanded event row with before-and-after values.

Pagination and retention

The list shows 50 events per page, with a "Showing 1–50 of X" counter and page navigation at the bottom. Below the list is a note along the lines of "Events shown from the last 2555 days, per your retention policy" — 2555 days being the default seven years.

Despite what the similarity of the names might suggest, **this number is not changed in Settings**. The retention field in Settings governs documents; the audit trail's own retention period is not exposed anywhere in the interface today. If you need to change it, that is a task for whoever maintains the installation.

Where to go next

This screen is read-only — if you are looking for a place to change something, the audit trail is not it; it is the record of what has already changed elsewhere. People with the Observer role do not have access to it — a deliberate restriction, because the audit trail is often more sensitive than the data it describes.

Owner view

A simple panel for the owner: what needs attention today, the key numbers, and exporting all data. Backups and diagnostics live in the System centre.

An ordinary screen like "Vendors" or "Documents" shows one slice of the work. **Owner view** answers a single question: what needs your attention in the business today. What is a tile with a number on the dashboard is spelled out here as a specific supplier, a specific deadline and a specific decision.

The technical side of the installation — services, backups, background jobs, diagnostics and version — **is no longer on this screen**. It moved to the **System centre**, so that the role running the installation and the role running the business are not looking at the same screen. This guide covers only the business side; the technical side is covered by the guide on the system centre.

Where to find it

In the left-hand menu, under "Overview", click **Owner view**. Only the **Owner** and **Business administrator** roles see this screen — every other role is quietly redirected to the dashboard. The System administrator has no access here deliberately: that role never touches commercial data, so the whole screen would be empty for them.

The coloured card about installation health

Right at the top, a coloured card about technical health can appear — and it only shows **when something is genuinely wrong**. On a healthy installation there is nothing there, so the card's absence is good news, not a lack of information.

The Owner gets a link to the system centre below it. The Business administrator gets a request to have the system administrator take a look there — since they cannot open that screen themselves.

The numbers

Next come up to five numbers — deliberately few, because this is not a second dashboard. A tile you do not have the right to see does not grey out, it **disappears entirely**. At zero, every tile stays neutral; red and yellow are reserved for numbers above zero.

One is worth knowing precisely: **High risk, confirmed**. It only counts suppliers a human has assessed as risky. The model's own suggestion, as long as nobody has confirmed it, never enters this count.

What needs your attention today

Below is a list of matters that genuinely need a human decision, grouped by deadline: **Already overdue**, **Today**, **This week** and **Worth knowing**. An empty section does not appear at all.

- expired documents for specific suppliers,
- overdue onboarding cases,
- approvals waiting on your decision,
- suppliers who have just submitted documents for review,
- documents expiring within 30 days,
- invitations the supplier has not yet opened,
- bank account changes waiting to be checked.

In the overdue section, at most five items of one kind are listed, so one neglected supplier does not take over the whole screen. If nothing needs attention, you will see one calm sentence instead of a list: "Nothing needs your attention. Check back tomorrow."

You never approve or reject anything here — every row is a door to the right screen.

Exporting all data

At the bottom is a card with a single action: **Export everything**. This is one file with every supplier, case, document and audit entry — useful for an auditor, or when moving data to another system. Export is the only operation this screen performs.

What is no longer here

If you know an older version of the product, or an older guide, the following have moved or disappeared — worth knowing instead of looking for them on this screen:

- **Backups and restore** — in the System centre, on the "Backups" tab. Only the Owner can restore one.
- **Report for technical support** — in the System centre, on the "Diagnostics" tab.
- **Installation version and component health** — in the System centre, on the "Installation" and "Services" tabs.
- **Deleting demo data** — removed from the interface entirely. It is no longer here, or in the system centre.

Where to go next

For the technical side — backups, diagnostics, background jobs — see the **System centre** guide. If your installation is already a few months old, it is also worth reading **Security and GDPR**: it explains exactly what sits behind the document retention and audit trail this view only points to.

SECURITY & COMPLIANCE

Security and GDPR

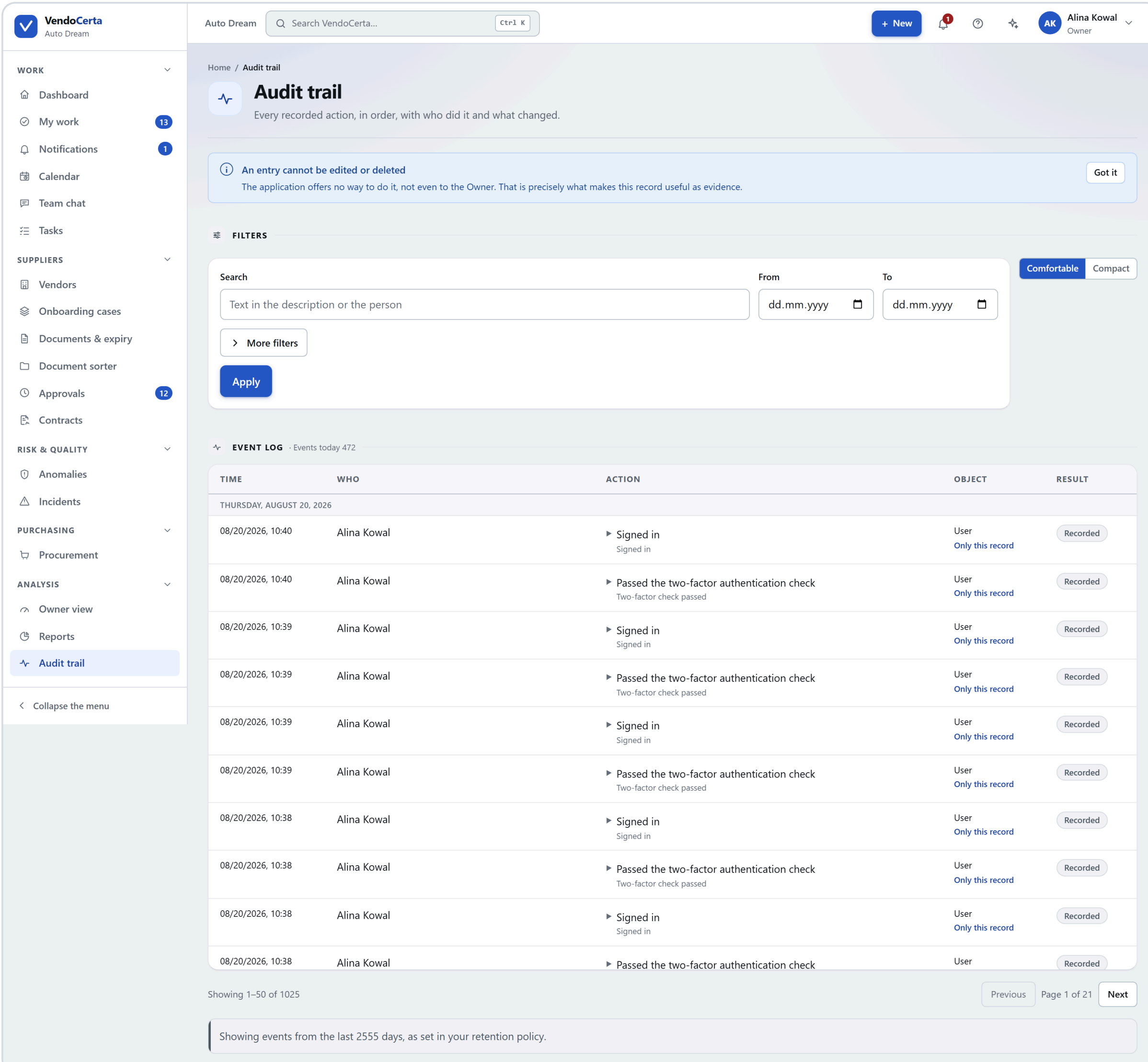
How VendoCerta protects data: a read-only audit trail, retention, encrypted bank details, who sees what.

There is no single "Security" screen — data protection in VendoCerta is spread across the whole system: in how the trail is recorded, in document permissions, in encrypting bank details, and in retention settings. This guide gathers it in one place, in plain language, and shows where you will actually see it on screen.

The audit trail cannot be corrected or deleted

Every recorded action in VendoCerta — a sign-in, a supplier status change, a document decision, an invitation sent, a downloaded file — goes into the **Audit trail** (in the menu: "Analysis" → "Audit trail"). This is a **read-only** record: there is no function anywhere in the system to edit or delete an entry, not even for the Owner. Under the screen's heading is a one-line hint: "An entry can't be changed or deleted". The full sentence — "This record cannot be edited or deleted from within VendoCerta — not even by the owner. That is exactly what makes it useful as evidence during an audit." — sits behind the question mark in the top bar.

Every entry shows who did what, when and — for data changes — what the values looked like before and after. **Access denials** are recorded too: if somebody tries to view something they do not have permission for, that is also noted, so repeated attempts are visible.



The Audit trail screen — a read-only record.

Who sees sensitive documents

Any ordinary supplier document (certificates, policies, contracts) is visible to anyone with access to their record. Documents marked **sensitive** — chiefly ones related to payments — additionally require a separate permission, and in practice only the **Owner** and **Administrator** roles see them. Trying to open a file you do not have permission for ends in a refusal, not an error — and like any refusal, it is recorded in the audit trail.

Files are also never shared as a plain, permanent link: the application generates a digitally signed link, valid for only a few minutes and tied to your own company — opening it from a different context gets you nowhere.

Suppliers' bank accounts

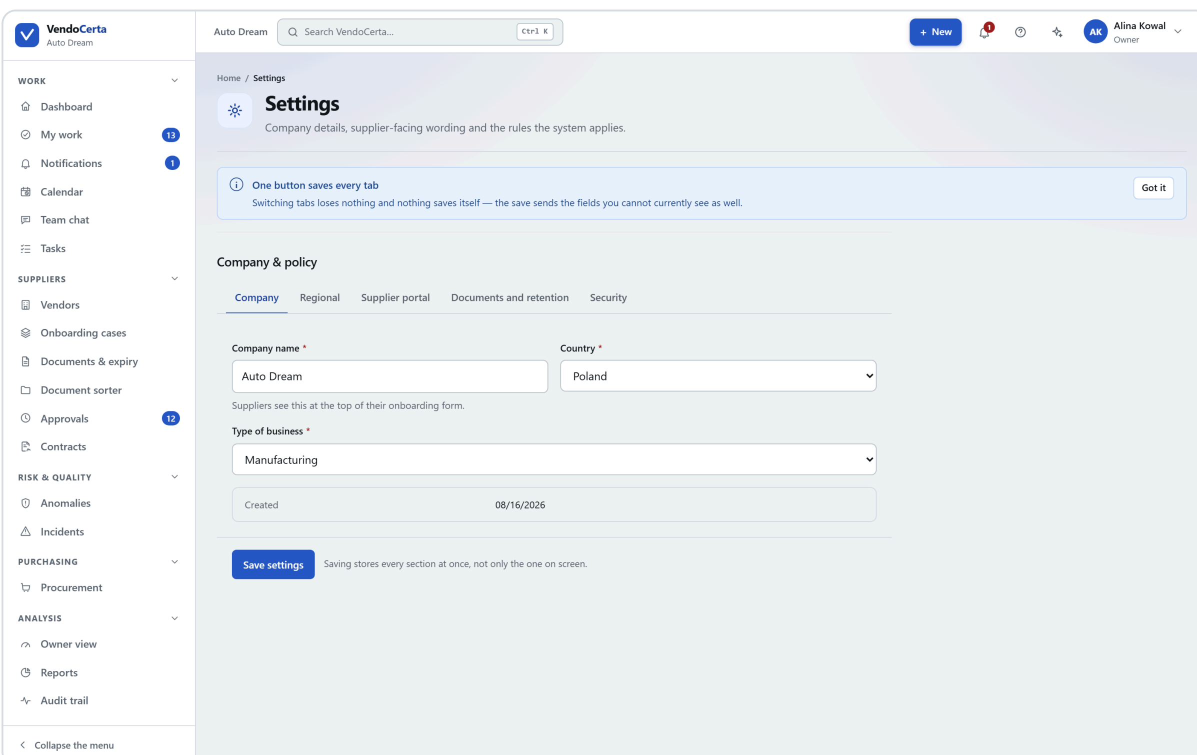
A bank account number is not stored as plain text in the database — it is **encrypted** (AES-256-GCM) the moment it is saved. Reading the full number requires a separate "Show account number" action, which in turn requires:

- re-confirming with your password (even if you are already signed in),
- stating a reason (recorded in the audit trail — never the number itself),
- the permission for sensitive data.

Changing a supplier's bank account itself is never one person's decision: one person proposes the change, someone else verifies and approves it — and the phone verification has to go to a number known **beforehand**, before the change was ever reported, precisely so it cannot be worked around by supplying a new number together with the change.

Retention period

The **Settings** screen has five tabs. On the **"Documents & retention"** tab is a numeric field where you set how long VendoCerta should keep **documents**. The default value is **2555 days, i.e. seven years** — a typical period required for procurement audits. You can change it at any time, the same as the rest of Settings.



The "Documents & retention" tab on the Settings screen.

It is worth knowing honestly what this number does today: it records your policy and will drive future automatic housekeeping — for now, nothing is deleted automatically just because this deadline has passed.

At the bottom of the Audit trail screen is a very similar-looking number of days, but it is **not the same field**. That one comes from a separate audit trail retention setting, which cannot currently be changed from the interface — changing the field in Settings will not move it.

Who can do what — in short

| | Owner | Business administrator | System administrator | Reviewer | Observer | | --- | --- | --- | --- | --- | --- | | Sees suppliers and documents | yes | yes | — | yes | yes | | Adds and edits suppliers | yes | yes | — | — | — | | Reviews documents and decides on approval | yes | yes | — | yes | — | | Sees sensitive documents (payment details) | yes | yes | — | — | — | | Manages users and roles | yes | yes | yes | — | — | | Restores a backup | yes | — | — | — | — |

The **System administrator** column is often a surprise, and that is deliberate: this role keeps the installation running — creates backups, runs diagnostics, changes configuration — and deliberately **has no visibility** into suppliers, documents or cases. Restoring a backup is a separate, narrower permission than creating one, though: only the Owner can do it, even though the system administrator manages backups day to day. The business administrator does neither — it cannot create or restore backups.

Nobody — including the Owner — can change their own role, and an Administrator cannot create or demote an account with the Owner role. The last remaining Owner account in a company cannot be demoted or disabled, so the company is never left without anyone holding full permissions.

Invitations for suppliers

The link inviting a supplier to onboarding is not a password to an account — it is a single-use, random token, valid for a limited time (a week by default; see the **Company configuration** guide). Sending a new invitation automatically invalidates the previous one — and that is currently the only way to cut off a link that has been sent. There is no separate "revoke invitation" button in the interface. If a link went to the wrong address, send a new invitation from the case screen: the old one stops working immediately, even if someone had already opened it.

Where to go next

If you are looking for technical detail beyond this guide (for your company's security team, or an auditor), ask whoever maintains the installation technically for `docs/SECURITY.md` and `docs/THREAT_MODEL.md` in the VendoCerta repository — the source this guide was drawn from. Day to day, this text and the **System centre** are enough — its "Diagnostics" tab is where you download a safe report for technical support. The report contains versions, counts and masked log lines — never document contents, banking details, or suppliers' personal data.

AI ASSISTANT

Assistant settings

What the AI assistant is allowed to do: enabling it, access for suppliers, the paid model, conversation retention, question limits, the security log.

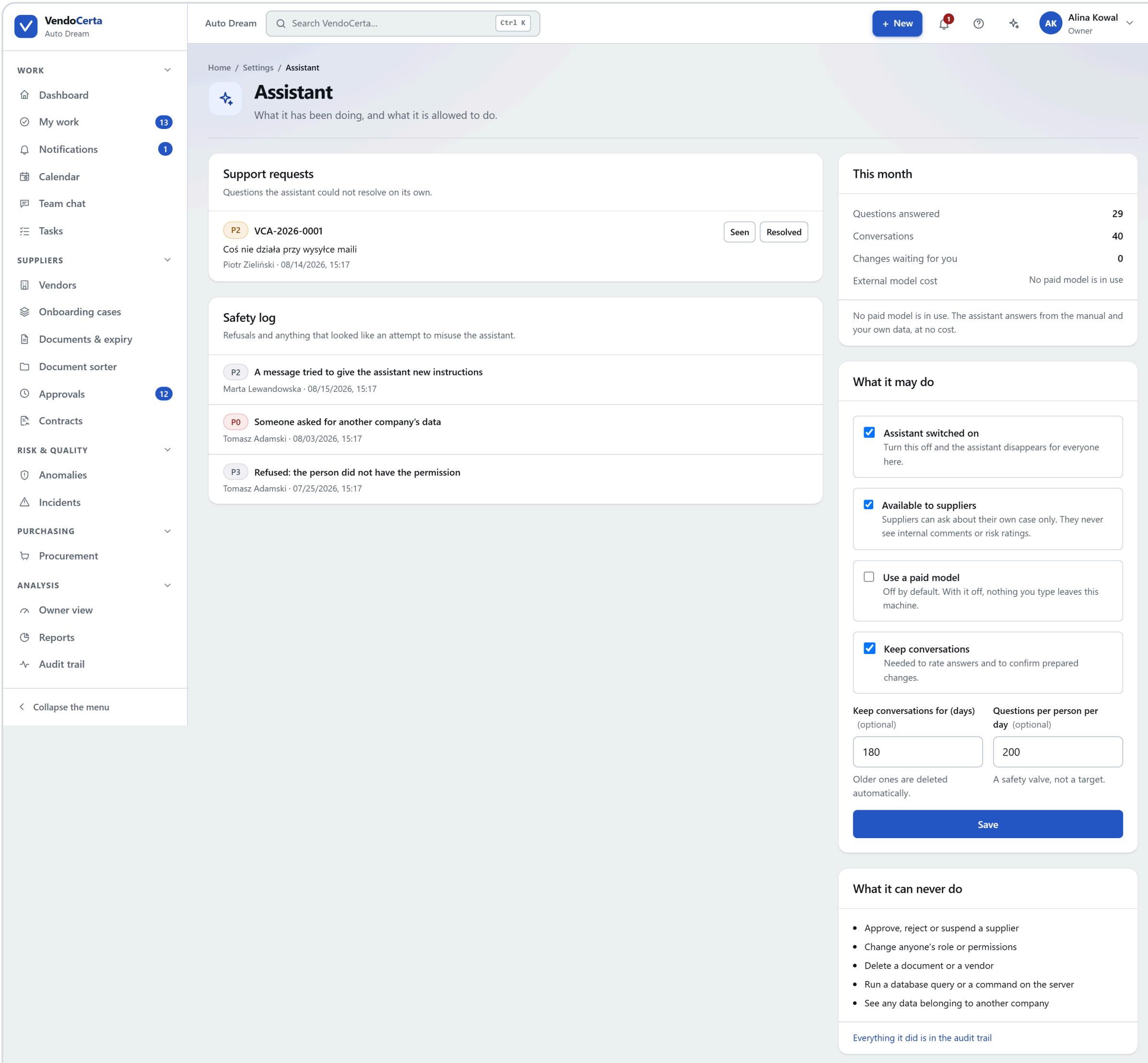
The AI assistant answers questions about suppliers and onboarding, drawing on the manual and your company's data. This screen is the one place where you decide who is allowed to use it, how much it can cost, and what it is allowed to do — without touching any server configuration.

Where to find it

In the left-hand menu, under **"Administration"**, click **Assistant settings**. It is named this way, rather than simply "Assistant", deliberately: this is a page of switches and a conversation log, not the place where you actually talk to the assistant — that is called up with the sparkle icon in the top bar.

The screen is available to the same people who see Company settings — in practice the Owner and the Business administrator.

Four sentences describing what to expect on this screen ("Every assistant action is recorded", "Escalations awaiting a decision", "Monthly cost and usage", "Assistant limits and permissions"), along with a reminder of the rules — that the assistant answers questions and can **prepare** a change for your confirmation, but never approves a supplier, changes roles, or deletes anything, and sees only your own company's data — sit **behind the question mark in the top bar**. The coloured banner above the screen is gone.



The whole Assistant settings screen — escalations, the security log, costs.

Support tickets (escalations)

When the assistant hits a question it cannot handle on its own, it leaves a ticket with a reference number (e.g. VCA-2026-0001) and a priority from **P0** (most urgent) downward. Each ticket has two buttons: **Seen** and **Resolved** — marking that you have noticed it, or that it is closed. If any ticket has priority P0 or P1, a red alert also appears at the very top of the screen, so it is sure to catch your eye.

Security log

This is a list of everything that looked like an attempt to misuse the assistant, or that it refused — not a list of its ordinary answers. It includes things like:

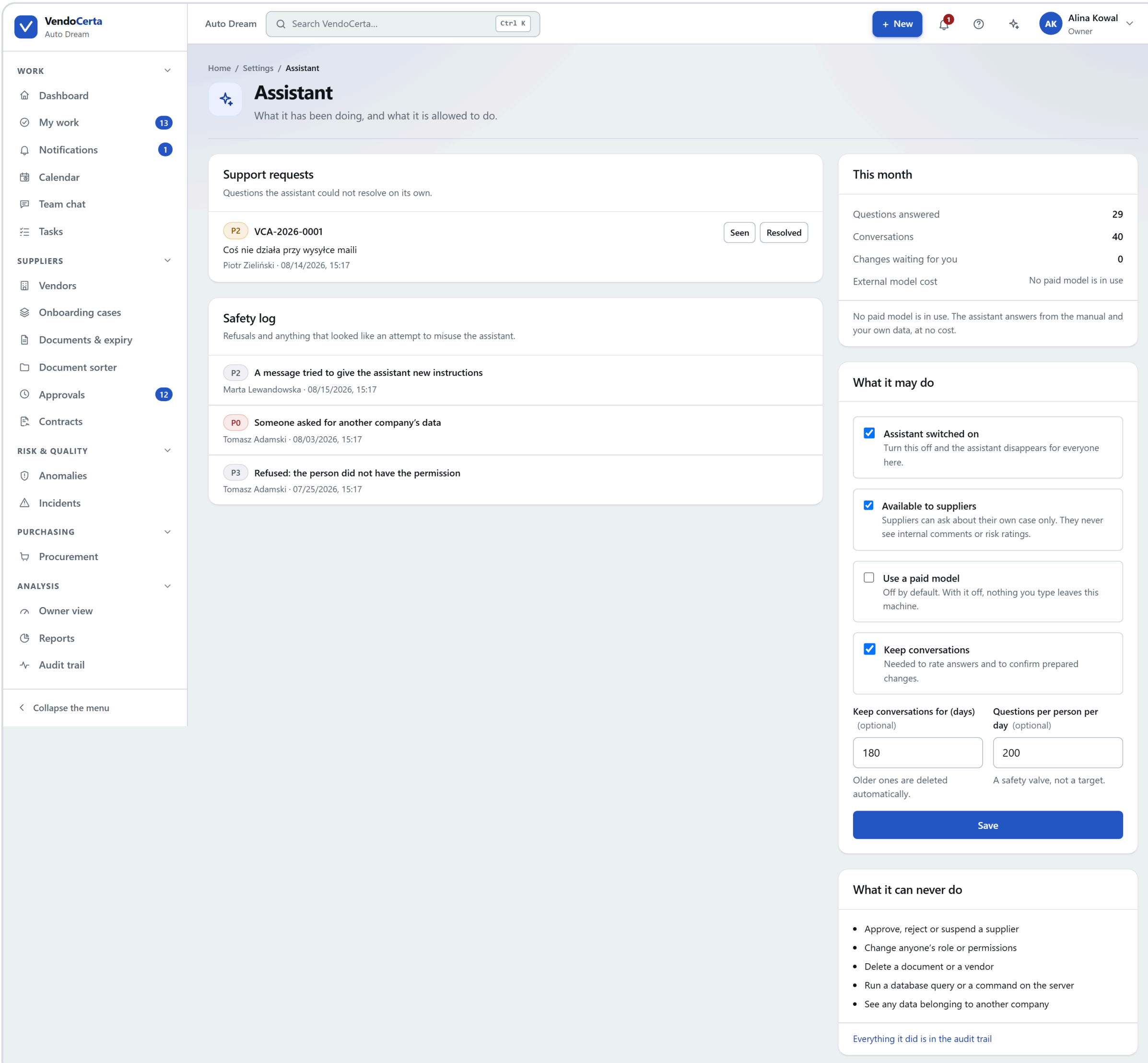
- a message trying to impose new instructions on the assistant (so-called prompt injection),
- a request for another company's data,
- a refusal because that person lacks the permission,
- a refusal of something the assistant is never allowed to do,
- hitting the question limit,
- an answer somebody flagged as unsafe.

If the list is empty, that is good news — it means nothing has been logged here yet.

This month

A short summary on the right: the number of answers, the number of separate conversations, the number of changes the assistant has prepared and is still waiting on your confirmation for, and how much it has cost. If the paid model is switched off (see below), you will see "Nothing" instead of a figure — because nothing costs anything in that case.

What it is allowed to do — settings you can change



"What it can do" and "What it will never do" cards.

- **Assistant enabled** — turning this off makes the assistant disappear for everyone in your company, not just for you.
- **Available to suppliers** — suppliers in their own portal can ask only about their own case. They will never see internal comments or risk assessments.
- **Use the paid model** — **off** by default. While it is off, nothing anyone types into the assistant leaves this machine — it answers from the manual and local data, at no cost. Turning this on lets it use an external, paid language model for better answers.
- **Keep conversations** — needed so that answers can be rated and changes the assistant has prepared can be confirmed. With this off, a conversation disappears the moment it ends.
- **Keep conversations for (days)** — older conversations are deleted automatically after this many days.

- **Questions per person per day** — a limit on how many questions one person can ask in a day. This is a safety valve against misuse, not a target anyone is meant to aim for.

Changes are confirmed with the **Save** button at the bottom of the form — only then do they take effect.

What the assistant will never do

Regardless of the settings, a few things are permanently blocked, with no way to turn them on:

- approve, reject or suspend a supplier,
- change anyone's role or permissions,
- delete a document or a supplier,
- run database queries or server commands,
- see any other company's data.

Below this list is a link, **Everything it has done is in the event log** — it leads straight to the Audit trail, where every one of its actions is visible.

Where to go next

This screen states what the assistant is **allowed** to do. If you want to see how an ordinary person on the team, or a supplier in their own portal, actually uses it day to day, look for the guide on using the assistant itself, in the Academy's "AI assistant" section.

SETTINGS

Theme, language and hints

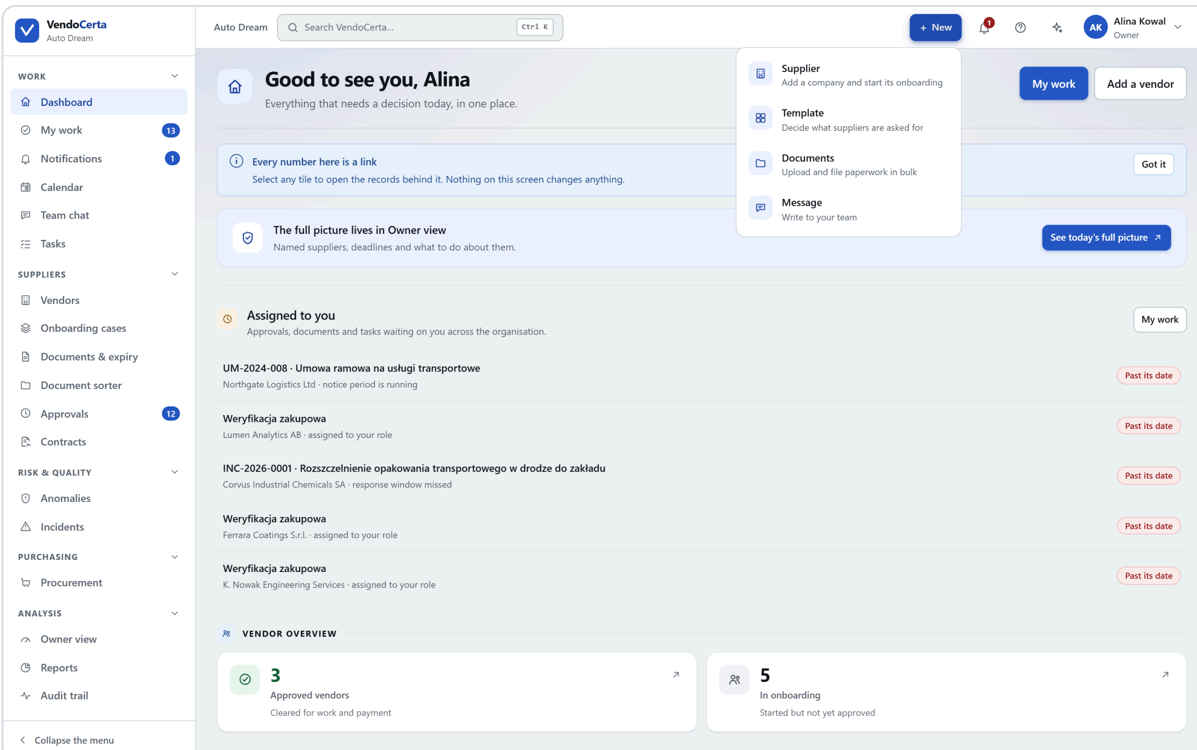
Three settings that concern only you, in the account menu: the theme (Auto follows the clock, not the system), one of eight languages, and hints under headings.

VendoCerta has three settings that concern **only you** and nobody else: the colour theme, the interface language, and the hints under screen headings. All three take effect the moment you click them — there is no "Save" button next to them, unlike the Settings screen.

Where to find it

Click your name in the **top right corner** of the screen. The account menu opens, and in it, one below the other: a **THEME** section, a **LANGUAGE** section, a **HINTS** section, a link to Security, and the sign-out button. At the top of the menu you see your name, e-mail address and role name.

On a narrow screen, such as a phone, you will find the same switches after opening the main menu — they sit under the list of screens there.



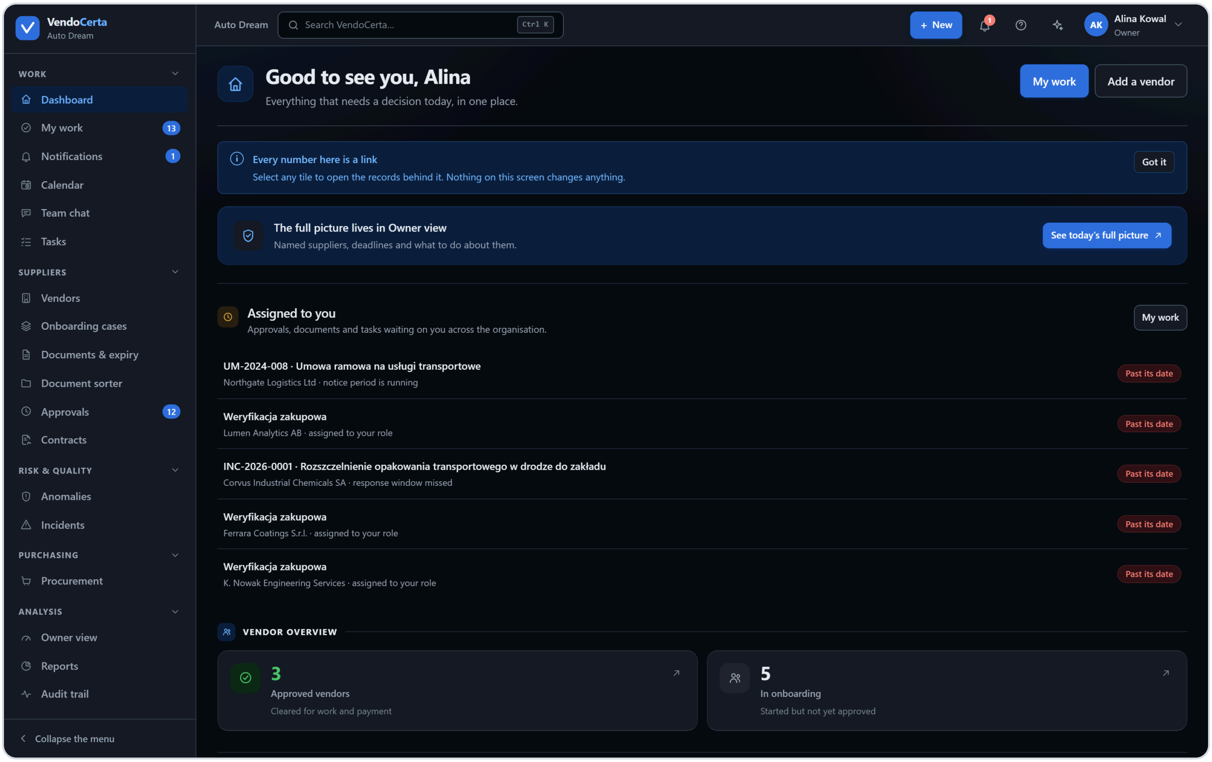
The account menu in the top right corner, with the theme, language and hints switches.

Theme: Light, Dark, Auto

- **Light** — light background, dark text.
- **Dark** — dark background, light text. More comfortable working in the evening or in a dimly lit room.
- **Auto** — the default setting.

One thing about **Auto** worth knowing precisely, because it can be misleading: VendoCerta does **not** follow your operating system's dark mode setting here. It goes by **this device's clock** — from 7:00 to 19:00 it shows the light theme, outside those hours the dark one. That is why the application can turn dark in the evening even though Windows or macOS is set to light mode, and vice versa. If you want one consistent look regardless of the time, choose **Light** or **Dark** directly.

The choice is saved in this browser, on this device — if you sign in on a different computer, you will need to choose the theme again. In private browsing mode (incognito), the choice may not be remembered at all.



The same screen with the Dark theme turned on.

Language

The language switch changes only **your own** view of the interface — menus, buttons, field descriptions. There are eight languages to choose from, each written in itself (Polski, English, Deutsch, Español, Français, Italiano, Русский, Українська), in two columns, so all of them are visible without scrolling.

- A colleague sitting next to you may have a different language set — it has no effect on them, or on you.
- This setting does **not** change the language a supplier sees their onboarding form in — that is chosen separately, when sending the invitation (see the **Sending a supplier invitation** guide).

After clicking a different language, the page refreshes itself, showing the same screen, just in the new language. Unlike the theme, the language is saved to your account, so it follows you to other devices.

Hints

Under the heading of most screens is one sentence about what is most commonly misunderstood on that screen — for instance, that "Coming up" on tasks means three days, not seven. That is useful once, and tiresome on the four hundredth visit, so it is a **setting** rather than something you dismiss one hint at a time: **On** or **Off**, honoured on every screen.

Turning it off does not hide the explanations for good. The full screen description stays behind the question mark in the top bar, where the dismissed hint's content lived anyway.

Where to go next

These are among the few settings in VendoCerta that do not go into the audit trail and require no permissions — any signed-in person can change them, regardless of role, and nobody changes them on somebody else's behalf. If you are looking for settings that concern the whole company rather than just you, see the **Company configuration** guide.

VENDORS

Working with the vendor filter

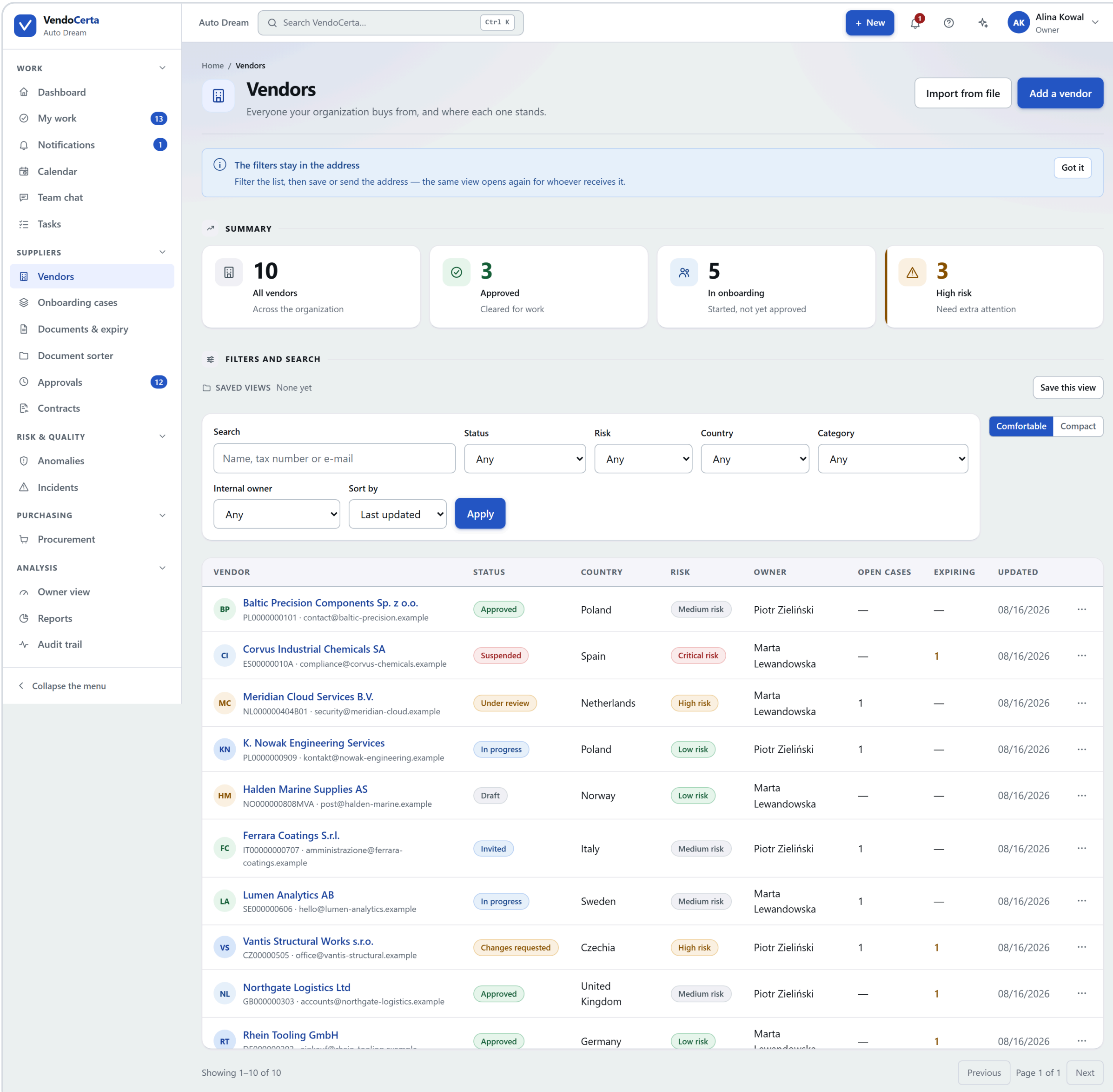
Search and filters on the vendor list: status, risk, country, category, owner, sorting, and how to read the risk badges.

Once the vendor list grows to a few dozen or a few hundred rows, scrolling stops being enough. This guide covers search and filters on the **Vendors** screen — not adding a supplier itself (a separate guide, **Adding your first supplier**, covers that), only finding the ones you already have in the system.

Where to find it

In the left-hand menu click **Vendors**. At the top is the screen title and one line of description ("Everyone you buy from, and what stage they're at").

The coloured banner with shortcut pills that used to sit here has been removed — the four shortcuts ("Search & filters", "Status change history", "Risk level & owner", "Documents & expiry") and the longer tip about searching by name, tax number and e-mail have not disappeared, they have **moved behind the question mark in the top bar**. You click it when you need them, instead of seeing them every day above the list.



The whole Vendors screen with the summary and filters.

Summary tiles

Above the filters are four numbers: **All vendors**, **Approved**, **In onboarding** and **High risk**. Three of them are clickable — "All vendors" is not.

Two of those clicks behave differently from what the tile's name suggests, and it is better to know that up front:

- **Approved** works as you would expect: it opens the list narrowed to status Approved.
- **High risk** does **not** narrow the list. It opens the full list **sorted** by risk level, descending. High risk is then at the top, but the row count does not change.

- **In onboarding** counts four statuses at once (Invited, In progress, Under review, Changes requested), but opens a list narrowed to **In progress** only. That is why the number on the tile can be larger than the number of rows you see after clicking.

If you actually want to narrow the list to high risk, use the **Risk level** filter below.

Search

The search box to the left of the filters searches **company name, tax number and e-mail address** at the same time — you do not need to know exactly which field the phrase you are looking for sits in.

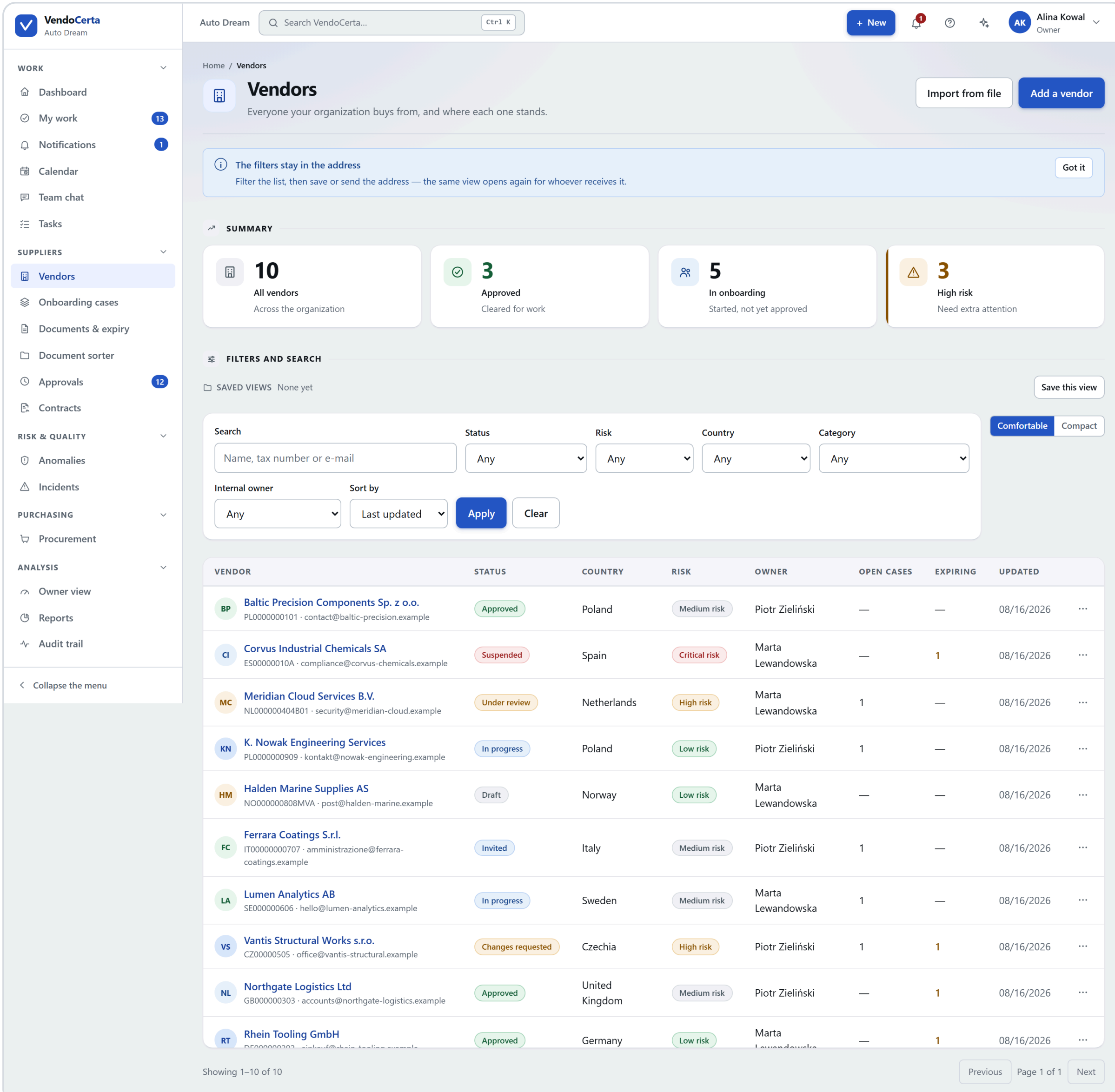
Filters to narrow the list

Next to the search box is a row of dropdowns that can be combined freely:

- **Status** — from Draft, through Invited, In progress, Under review, Changes requested, all the way to Approved, Suspended, Rejected or Archived.
- **Risk** — Low, Medium, High, Critical.
- **Country** — the countries present in your own vendor register.
- **Category** — visible only once your company has defined any vendor categories.
- **Internal owner** — a person on your own team assigned to that supplier.

At the end of the row is **Sort by** — by last updated (the default), name, date added, status or risk level.

Once you have set the filters, click **Apply**. The page address changes along with the filters (e.g. `/vendors?riskLevel=HIGH`), so you can freely bookmark the result or paste it to a colleague in chat — it opens exactly the same narrowed list. Whenever a filter is active, a **Clear** button appears next to Apply, returning you to the full, unfiltered list in one click.



The list narrowed by the Risk = High filter.

Reading a row in the table

- The **coloured circle with initials** before the vendor's name is not a photo — it is an avatar generated from the company name, always the same colour for the same supplier, to make rows easier to recognise while scrolling quickly.
- The **status pill** shows the stage a supplier is at (e.g. "Approved", "In progress", "Changes requested") — the pill's colour changes with the status.
- The **risk pill** reads "Risk: Low/Medium/High/Critical" — green for low, grey for medium, orange for high, red for critical. It is the same value set when adding a supplier, or later on their record.
- The **Open cases** and **Expires** columns show numbers — a dash means zero, so an empty-looking field is good news, not missing data.

Opening the full record

Clicking opens the supplier's full record — and the **whole row** is clickable, not just the name, so you will hit it anywhere across its width. The name itself is blue and only underlines under the cursor. The record holds registration details, documents, case history and decisions. The filtered list is a starting point for browsing, not a place where anything gets edited.

Where to go next

If you are looking for a specific supplier not yet in the system, that is a different guide — **Adding your first supplier**. If instead a supplier is already waiting on your decision about their documents, see **Checking documents**.