
	Quality System Template CSM Technologies	Document #: CSM/QT/01/01	Rev.: 1.0 Page #: 1 of 9
	Material Management		

Material Management **Store Manager** **USER MANUAL**

	Quality System Template CSM Technologies	Document #: CSM/QT/01/01	Rev.: 1.0 Page #: 2 of 9
	Material Management		

1 INTRODUCTION

The Material Management is a consolidated system to manage stocks and inventory of goods or items purchased in the company. It manages inventory items starting from purchase, approval, requisition, quotation, negotiation, approval of quotation, Consolidation of Quotation, Purchase Order, Good Receipt Note, Quality Checkup, Store Receive Voucher, Stocks, Fixed Assets, and Gatepass.

The system enables the authorized user to raise material request, and concerned SBU representative to take action on the request.


Let's learn how to do basic material request management online.

1.1 PURPOSE

The purpose of this document is to provide step-by-step guidance to the user on how to manage the Material Request and other inventory operations. This document provides complete guidance on understanding the Material Management Process, and help users to navigate through the process easily.

2 GETTING STARTED

To access to the material management, enter the website URL in the browser and the Welcome screen will display on the screen (Refer **Fig. 2-1**)

	Quality System Template CSM Technologies	Document #: CSM/QT/01/01	Rev.: 1.0 Page #: 3 of 9
	Material Management		

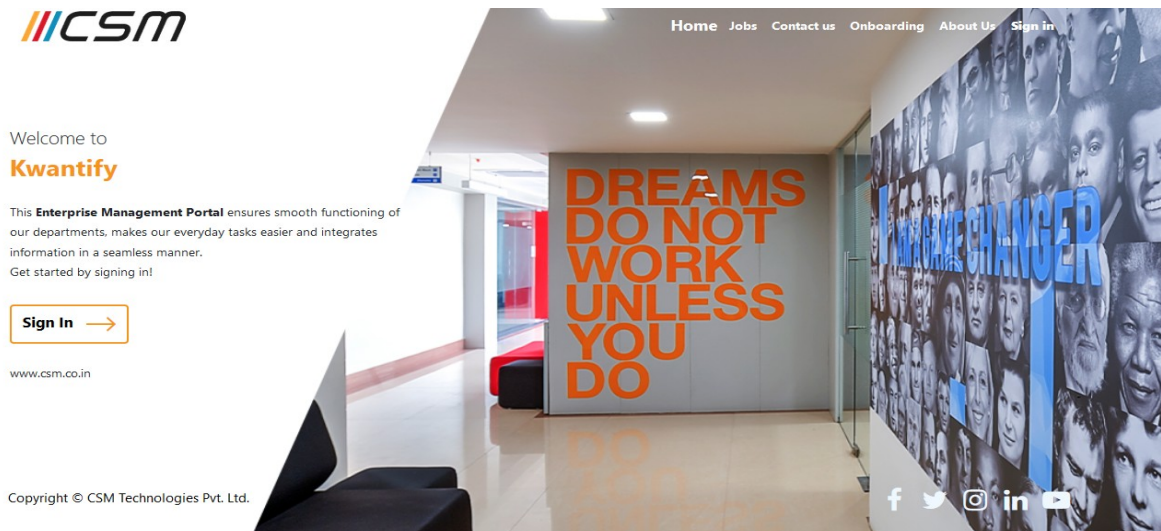


Figure 2-1 Welcome Screen

Refer to Fig 2-1, i.e. click on the **Sign In** button and navigate to the login screen.

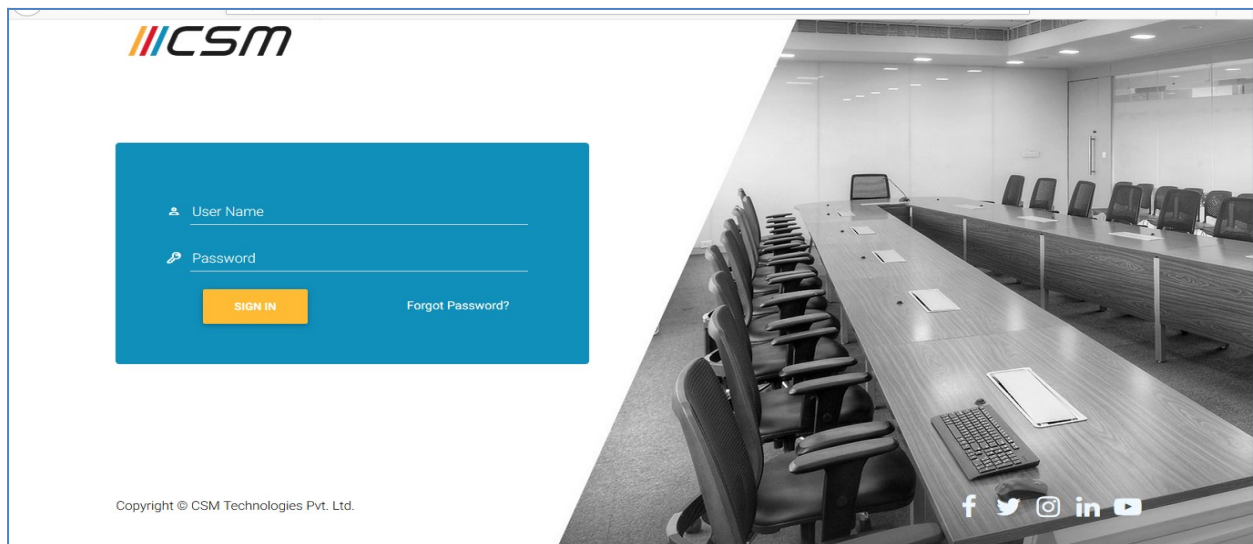



Figure 2-2 Login Screen

Refer Fig 2-2, shown above.

In the Login screen,

- Enter the User Name and Password in the textbox.
- Click on **SIGN IN** button.

	Quality System Template CSM Technologies	Document #: CSM/QT/01/01	Rev.: 1.0 Page #: 4 of 9
	Material Management		

On successful login, the user will be navigated to the “**My Dashboard**” screen. Refer Fig 2-3 shown below.

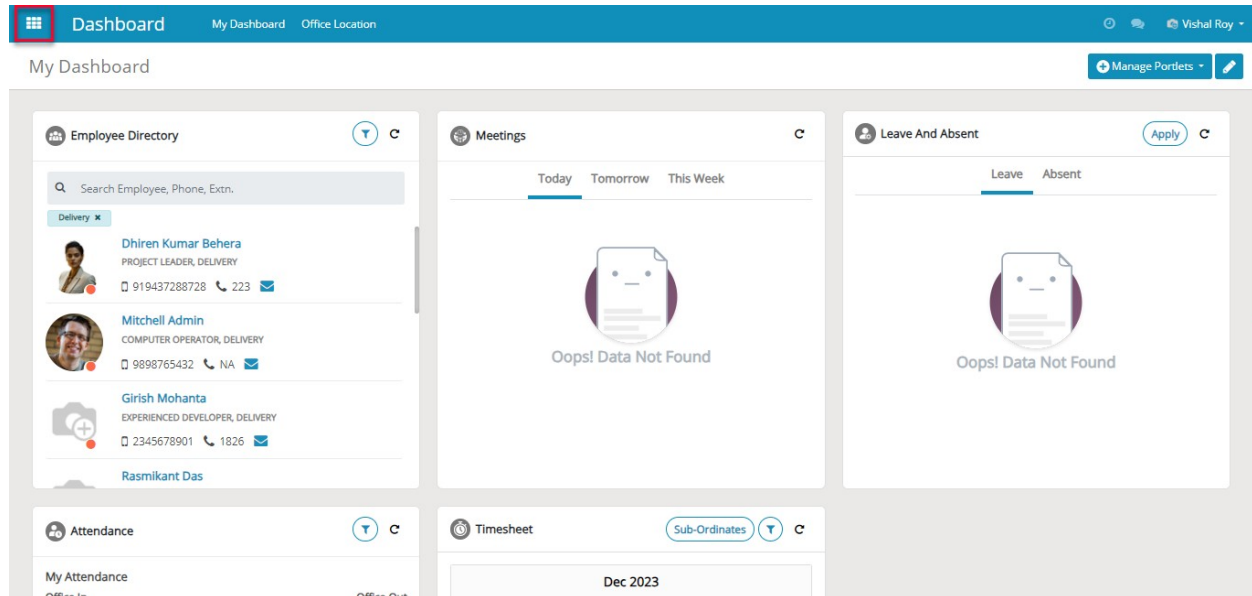



Figure 2-3 My Dashboard


- The dashboard features several portlets for employee directory, timesheet, attendance, etc.
- To go to the menu screen, user can click on **menu**  icon shown on the left-hand side corner of the above screen.

3 MATERIAL MANAGEMENT SYSTEM

This module enables the authorized user to automate the various task associated with handling of materials, starting to raising material request.

3.1.1.1 SERVICE ENTRY SHEET(SES) - STORE MANAGER LOGIN

Once the purchase order is confirmed, the Store Manager User needs to receive in case of services.

	Quality System Template CSM Technologies	Document #: CSM/QT/01/01	Rev.: 1.0 Page #: 5 of 9
	Material Management		

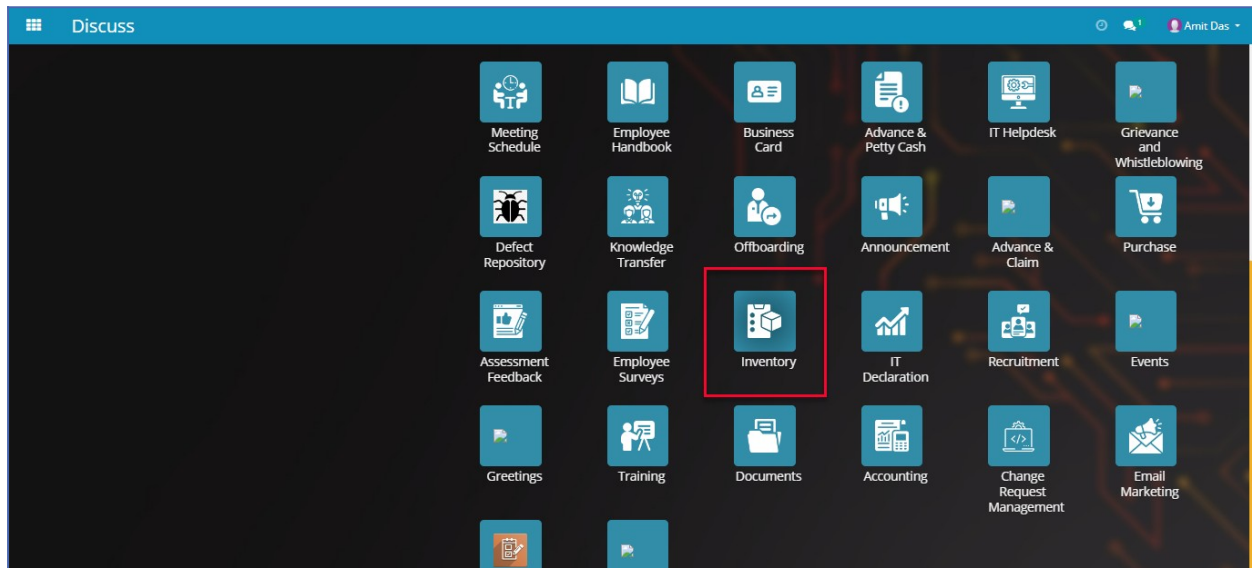


Figure 2.4-Inventory - Menu Screen

- Click on **Inventory** Module from the list of menu displayed and navigate to respective section.
- Click and expand the Overview menu link.

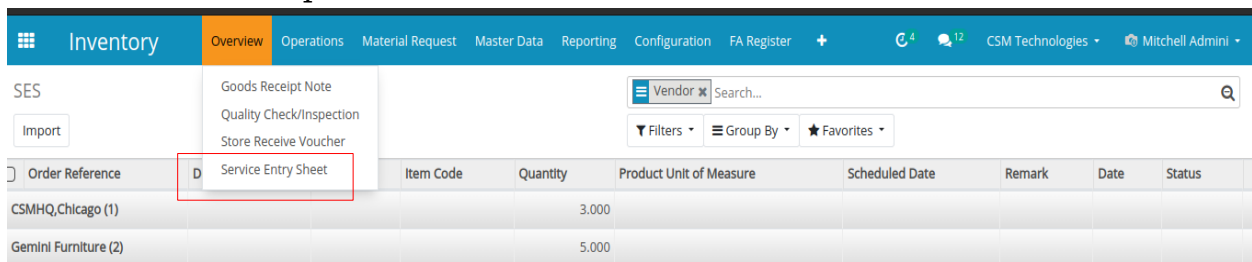

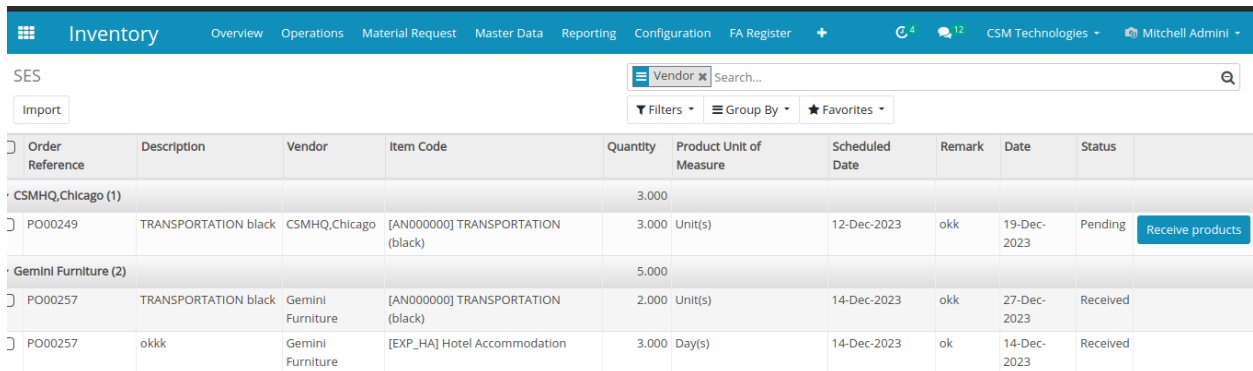


Figure 2.5- Overview - Service Entry Sheet (1)

- Click on **Service Entry Sheet** link.
- On clicking the list of the services are displayed in a table.
- Click to expand and view in details.

	Quality System Template CSM Technologies	Document #: CSM/QT/01/01	Rev.: 1.0 Page #: 6 of 9
	Material Management		



Order Reference	Description	Vendor	Item Code	Quantity	Product Unit of Measure	Scheduled Date	Remark	Date	Status	
CSMHQ,Chicago (1)				3.000						
PO00249	TRANSPORTATION black	CSMHQ,Chicago	[AN000000] TRANSPORTATION (black)	3.000	Unit(s)	12-Dec-2023	okk	19-Dec-2023	Pending	Receive products
Gemini Furniture (2)				5.000						
PO00257	TRANSPORTATION black	Gemini Furniture	[AN000000] TRANSPORTATION (black)	2.000	Unit(s)	14-Dec-2023	okk	27-Dec-2023	Received	
PO00257	okkk	Gemini Furniture	[EXP_HA] Hotel Accommodation	3.000	Day(s)	14-Dec-2023	ok	14-Dec-2023	Received	

Figure 2.6- Overview - Service Entry Sheet (2)

- To receive the services click on the Receive Products button.

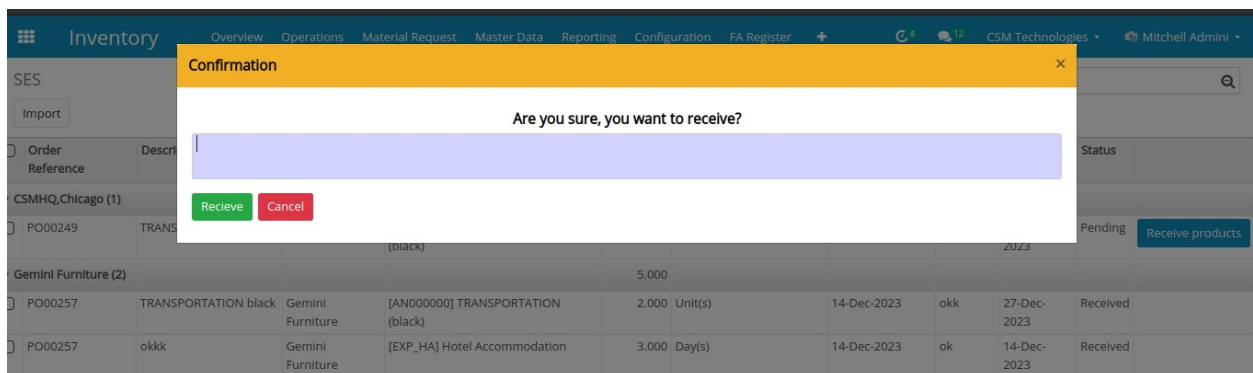

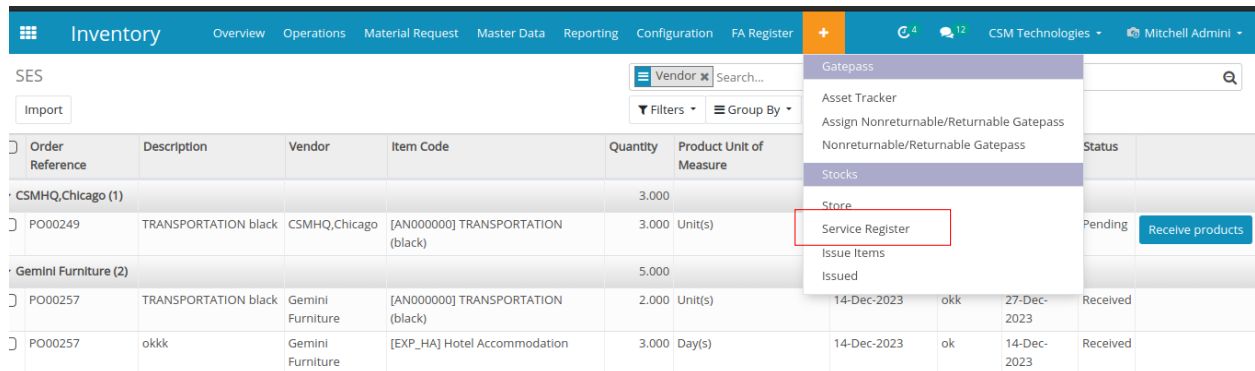


Figure 2.7- Overview - Service Entry Sheet(3)

- A confirmation pop-up will be opened asking for confirmation about the receiving.
- Click on **Receive** button to receive the service otherwise click **Cancel**.

	Quality System Template CSM Technologies	Document #: CSM/QT/01/01	Rev.: 1.0 Page #: 7 of 9
	Material Management		

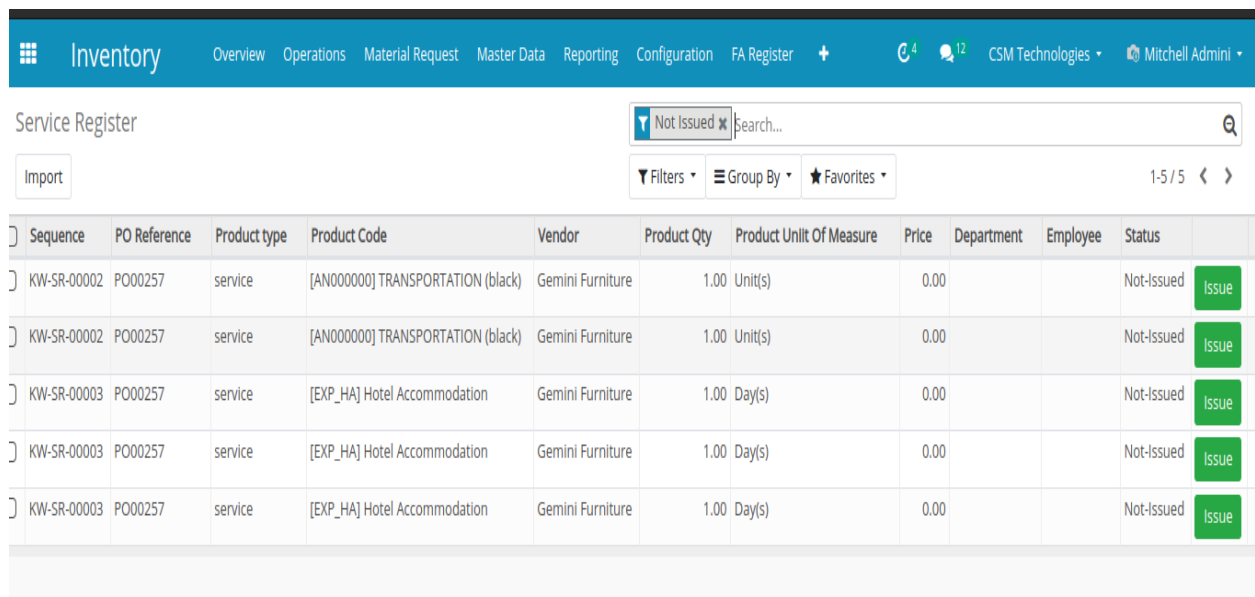


The screenshot shows the 'Inventory' module with a dropdown menu open. The 'Service Register' option is highlighted under the 'Stocks' category. The background table shows inventory items with columns for Order Reference, Description, Vendor, Item Code, Quantity, and Product Unit of Measure.

Order Reference	Description	Vendor	Item Code	Quantity	Product Unit of Measure
CSMHQ,Chicago (1)				3.000	
PO00249	TRANSPORTATION black	CSMHQ,Chicago	[AN000000] TRANSPORTATION (black)	3.000	Unit(s)
Gemini Furniture (2)				5.000	
PO00257	TRANSPORTATION black	Gemini Furniture	[AN000000] TRANSPORTATION (black)	2.000	Unit(s)
PO00257	okkk	Gemini Furniture	[EXP_HA] Hotel Accommodation	3.000	Day(s)

Figure 2.8- Stocks - Service Register

- The Services after receiving are available in service register.




The screenshot shows the 'Service Register' interface. It includes a search bar with 'Not Issued' selected, filters, and a table of services. Each row has an 'Issue' button in the status column.

Sequence	PO Reference	Product type	Product Code	Vendor	Product Qty	Product Unit Of Measure	Price	Department	Employee	Status	
KW-SR-00002	PO00257	service	[AN000000] TRANSPORTATION (black)	Gemini Furniture	1.00	Unit(s)	0.00			Not-Issued	Issue
KW-SR-00002	PO00257	service	[AN000000] TRANSPORTATION (black)	Gemini Furniture	1.00	Unit(s)	0.00			Not-Issued	Issue
KW-SR-00003	PO00257	service	[EXP_HA] Hotel Accommodation	Gemini Furniture	1.00	Day(s)	0.00			Not-Issued	Issue
KW-SR-00003	PO00257	service	[EXP_HA] Hotel Accommodation	Gemini Furniture	1.00	Day(s)	0.00			Not-Issued	Issue
KW-SR-00003	PO00257	service	[EXP_HA] Hotel Accommodation	Gemini Furniture	1.00	Day(s)	0.00			Not-Issued	Issue

Figure 2.9- Stocks - Service Register

- The services can be issued to user by store manager by clicking issue button.
- Upon clicking issue button pop-up will come for asking details about department, employee and remark for issuance for that particular service as per fig 3.0.

	Quality System Template CSM Technologies	Document #: CSM/QT/01/01	Rev.: 1.0 Page #: 8 of 9
	Material Management		

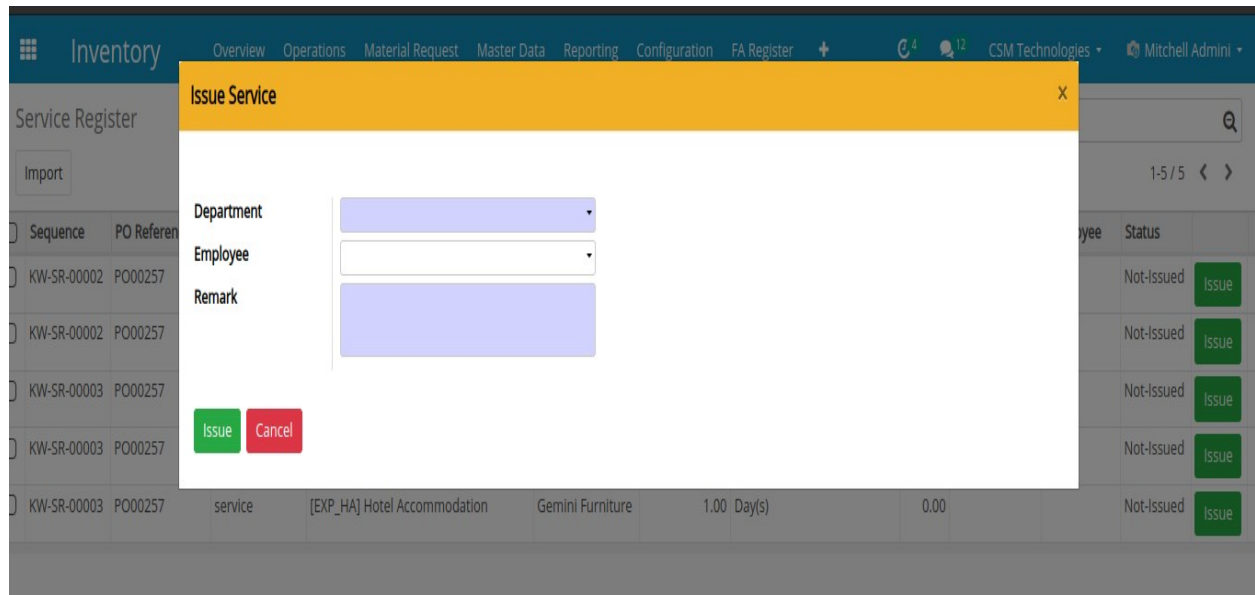


Figure 3.0 - Issue Service

- Once the service is issued it can be release when requirement comes.

Inventory

Overview

Operations

Material Request

Master Data

Reporting

Configuration

FA Register

+

G⁴

12

CSM Technologies

Mitchell Admini

Service Register

Search...

Import

Filters

Group By


Favorites

1-6 / 6

Sequence	PO Reference	Product type	Product Code	Vendor	Product Qty	Product Unit Of Measure	Price	Department	Employee	Status		
	PO00256		[pendolder01] PEN HOLDER	Azure Interior	1.00	Unit(s)	0.00		Amit Das	Issued		<div>Release</div>
KW-SR-00002	PO00257	service	[AN000000] TRANSPORTATION (black)	Gemini Furniture	1.00	Unit(s)	0.00	BSS		Issued		<div>Release</div>
KW-SR-00002	PO00257	service	[AN000000] TRANSPORTATION (black)	Gemini Furniture	1.00	Unit(s)	0.00			Not-Issued	<div>Issue</div>	
KW-SR-00003	PO00257	service	[EXP_HA] Hotel Accommodation	Gemini Furniture	1.00	Day(s)	0.00			Not-Issued	<div>Issue</div>	

Figure 3-1 Quality Check/Inspection (1)

- Click on Release button.
- On clicking a pop up will open asking for remarks.

	Quality System Template CSM Technologies	Document #: CSM/QT/01/01	Rev.: 1.0 Page #: 9 of 9
	Material Management		

- On clicking **Return** the service will be returned to the service register or else click **Cancel**.

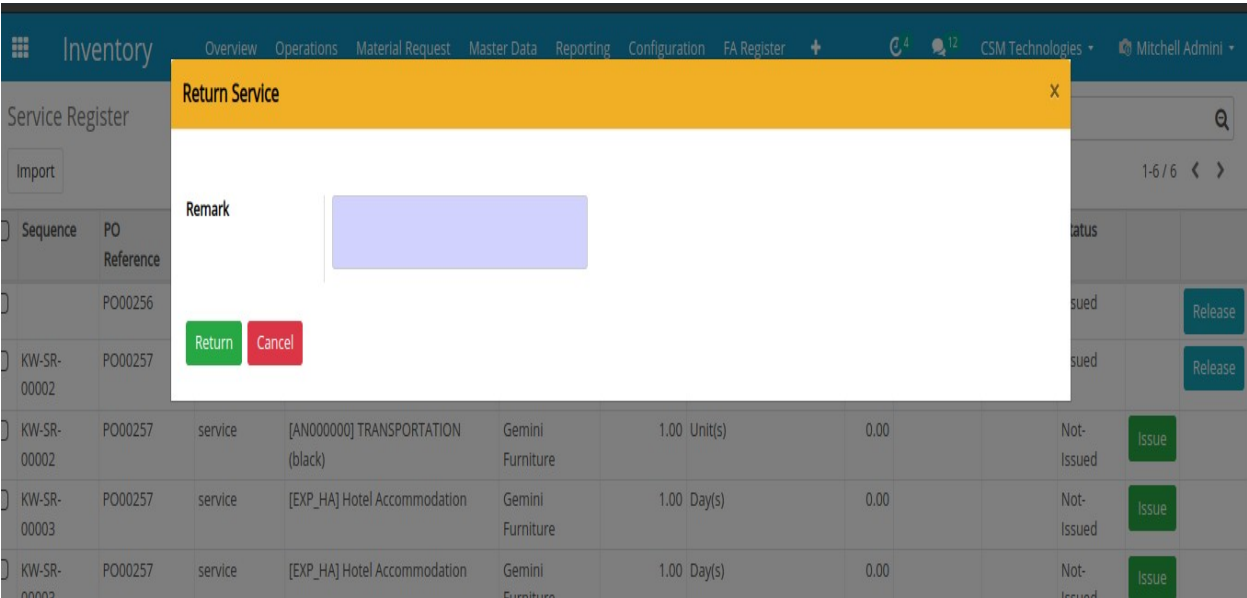


Figure 3.2- Return Service