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

Material Management **SBU Representative** **User Manual**

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

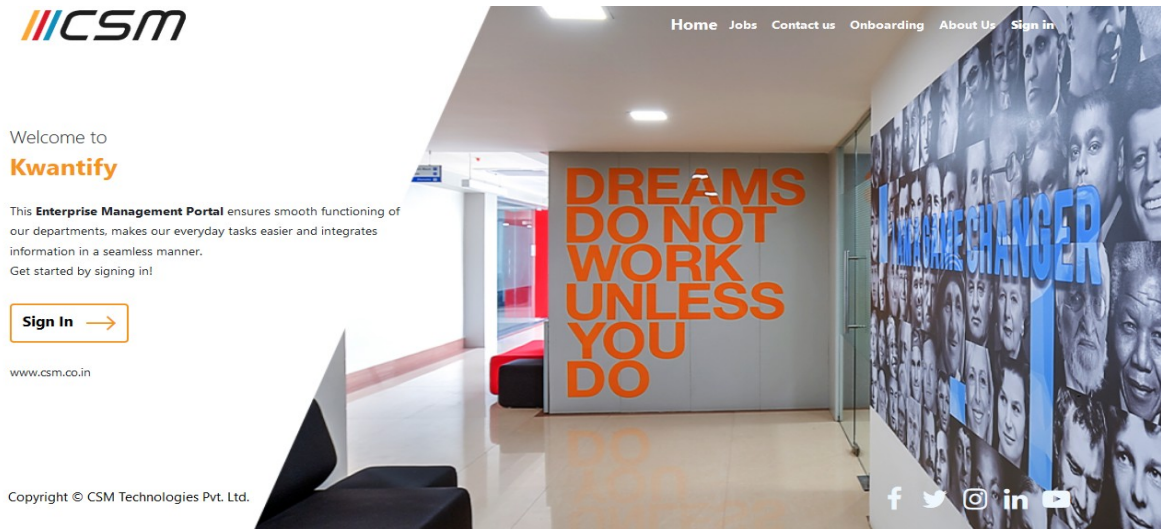


Figure 2-1 Welcome Screen

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

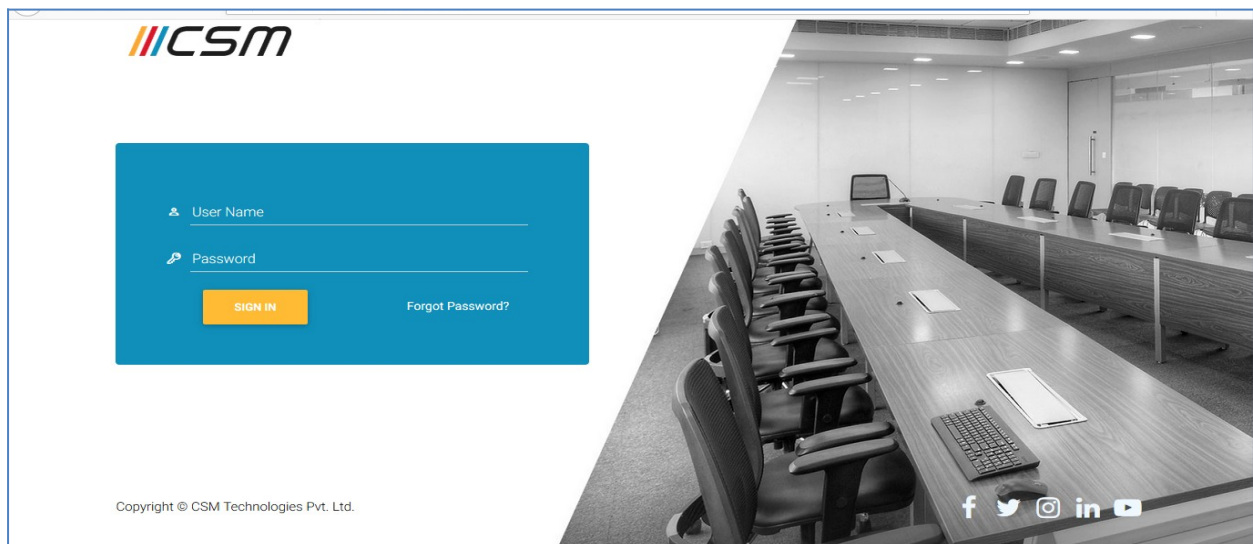



Figure 2-2 Login Screen

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
	Material Management		

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

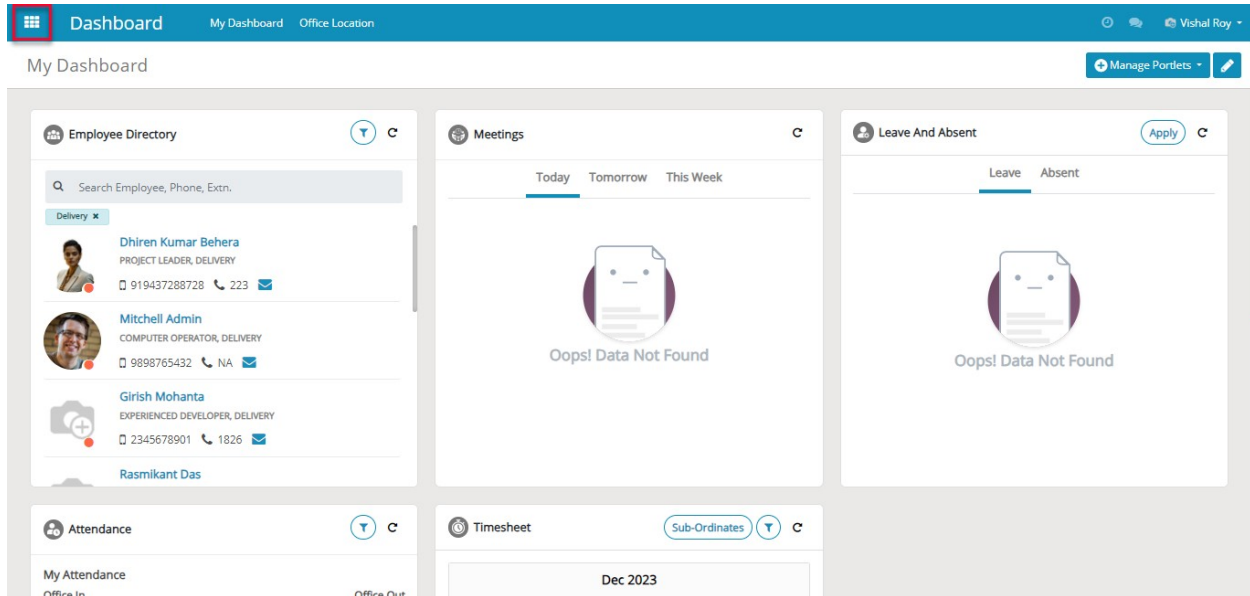




Figure 2-3 My Dashboard

- 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.

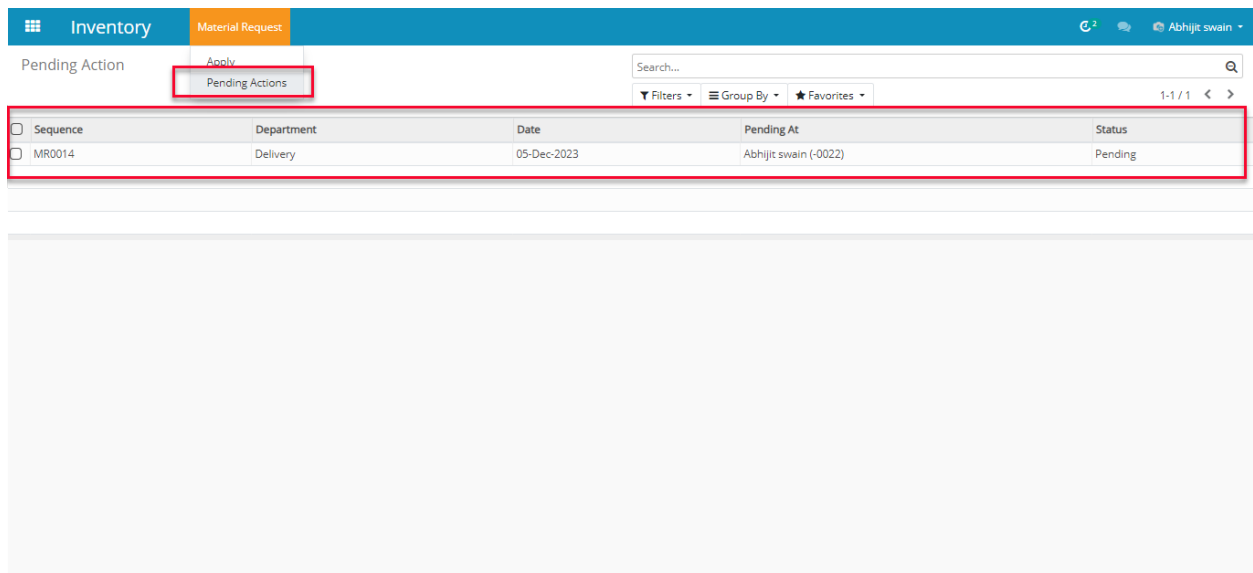
On successful submission, the request is forwarded to the SBU Head of the employee user for approval.

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

3.1 MATERIAL REQUEST APPROVAL - SBU REPRESENTATIVE

The SBU User needs to take action on the material request received from the employee user.

For doing so, the SBU user needs to login into the application and go to the Pending Actions under the Material Request section. Here is the path - **Login>>Dashboard>>Menu>>Inventory>>Material Request>>Pending Actions**




Inventory		Material Request	Abhijit swain	
Pending Action	Apply	Search...		
Pending Actions		Filters	Group By	Favorites
Sequence	Department	Date	Pending At	Status
MR0014	Delivery	05-Dec-2023	Abhijit swain (-0022)	Pending

Figure 2-4 Pending Actions - Material Request

In the Pending Actions, the request pending for approval are displayed.

- Click on the Application to navigate to the details page.

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

Inventory Material Request Abhijeet swain

Pending Action / MR0014

Edit 1 / 1

Approve **Reject** Draft Pending Approved Rejected Issued

Sequence	MR0014	Date	05-Dec-2023
Employee	Vishal Roy (01-9913)	Department Code	Delivery
Department	Delivery	Requirement Type	Treasury
Division	Solution		
Section	DevelopmentSec		
Practice	ERP		
Branch	Bhubaneswar		

Item Details

Product Category	Product Type	Item Code	Uom	Qty Required	Required Date	Issued to	Status
IT	EPBX	[00040200] EPBX (digital, Wired, Black)	Unit(s)	1.00	05-Dec-2023	Vishal Roy (01-9913)	Pending

Send message Log note Schedule activity 0 Follow 1

Figure 2-5 Pending Action/ Take Action (1)

In the details page, there are options provided to Edit, Approve, and Reject.

- To update any changes in the request, click on the **Edit** button.

Inventory Material Request Abhijeet swain

Pending Action / MR0014

Save **Discard** 1 / 1

Approve **Reject** Draft Pending Approved Rejected Issued

Sequence	MR0014	Date	05-Dec-2023
Employee	Vishal Roy (01-9913)	Department Code	Delivery
Department	Delivery	Requirement Type	Treasury
Division	Solution		
Section	DevelopmentSec		
Practice	ERP		
Branch	Bhubaneswar		


Item Details

Product Category	Product Type	Item Code	Uom	Qty Required	Required Date	Issued to	Status
IT	EPBX	[00040200] EPBX (digital, Wired, Black)	Unit(s)	2.00	05-Dec-2023	Vishal Roy (01-9913)	Pending

Send message Log note Schedule activity 0 Follow 1

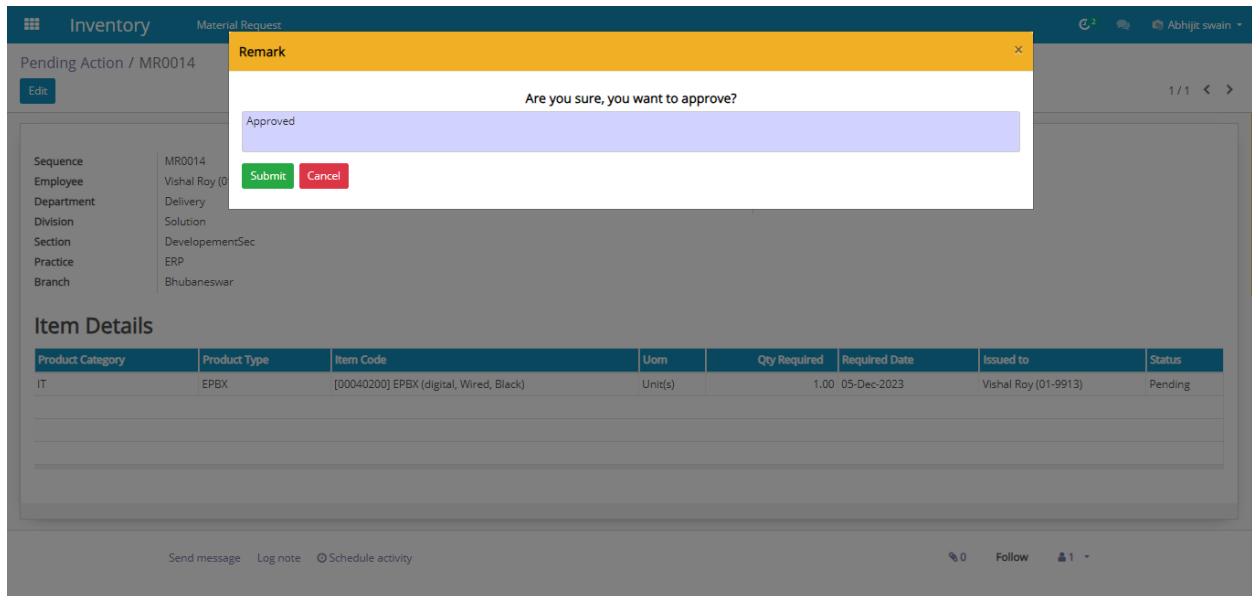
Figure 2-6 Pending Action/ Take Action (2)

- Update the request details, such as the Item information, if required.
- Click on **Save** button to save the changes done.

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

Approve

- If the field details are correct, then click on the Approve button.
- On clicking, a confirmation alert message populates on the display screen saying – *Are you sure, you want to approve?*




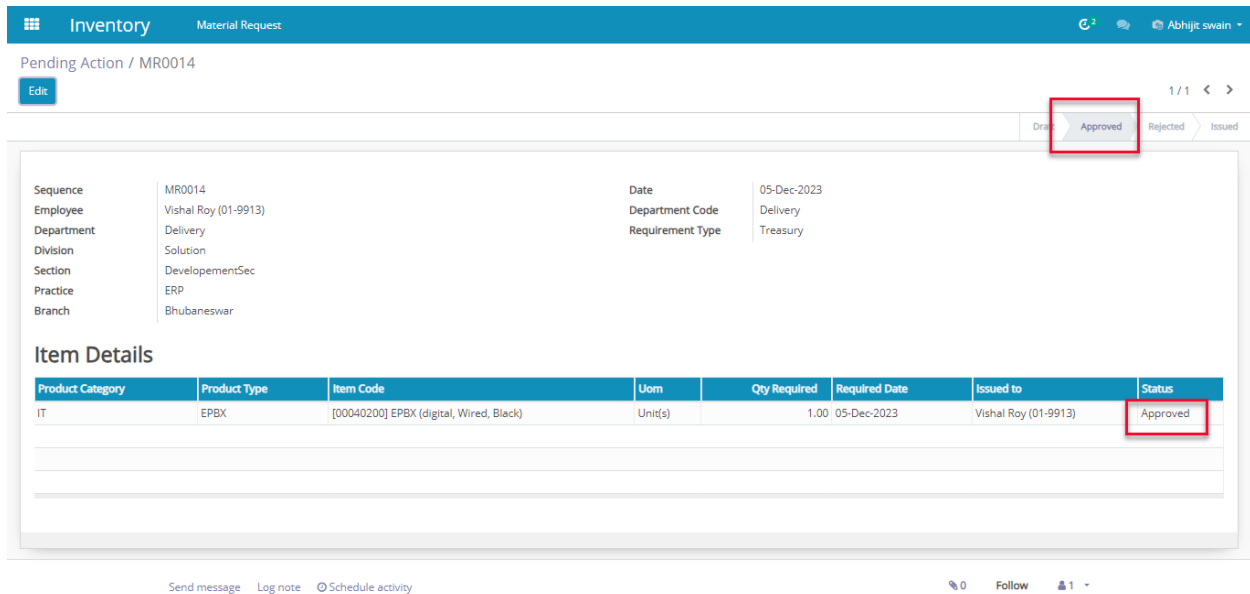
The screenshot shows the 'Inventory' management interface. A 'Material Request' is pending action (MR0014). A confirmation dialog box is displayed with the text 'Are you sure, you want to approve?'. The dialog has a 'Submit' button (green) and a 'Cancel' button (red). Below the dialog, the 'Item Details' table is visible, showing the request for 1.00 units of EPBX (digital, Wired, Black) required by 05-Dec-2023, issued to Vishal Roy (01-9913), with a status of 'Pending'.

Product Category	Product Type	Item Code	Uom	Qty Required	Required Date	Issued to	Status
IT	EPBX	[00040200] EPBX (digital, Wired, Black)	Unit(s)	1.00	05-Dec-2023	Vishal Roy (01-9913)	Pending

Figure 2-7 Pending Action/ Take Action (3)

- Add remarks for the action to be taken.
- Click on the **Submit** button.
- On submission, the material request is approved. The current status of the request is updated in the details section.

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



Inventory Material Request

Pending Action / MR0014

1 / 1

Approved Rejected Issued

Sequence: MR0014
Employee: Vishal Roy (01-9913)
Department: Delivery
Division: Solution
Section: DevelopmentSec
Practice: ERP
Branch: Bhubaneswar

Date: 05-Dec-2023
Department Code: Delivery
Requirement Type: Treasury

Item Details

Product Category	Product Type	Item Code	Uom	Qty Required	Required Date	Issued to	Status
IT	EPBX	[00040200] EPBX (digital, Wired, Black)	Unit(s)	1.00	05-Dec-2023	Vishal Roy (01-9913)	Approved

Send message Log note Schedule activity

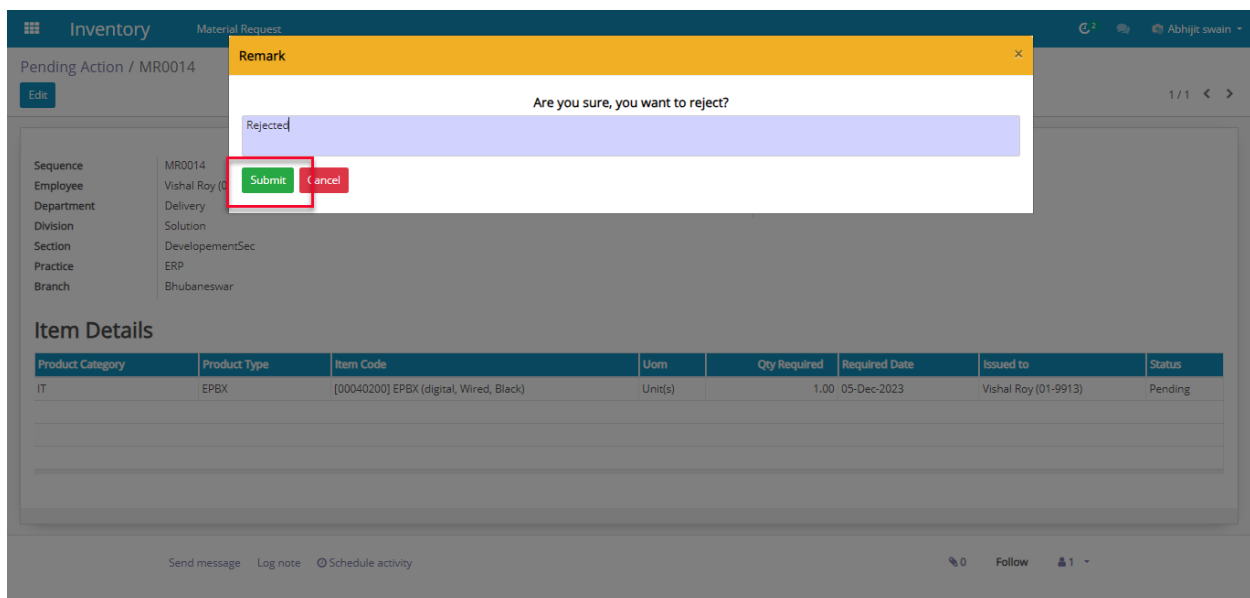
0 Follow 1

Figure 2-8 Pending Action/ Take Action (4)

Take reference from the highlighted section in the **Figure 2-10** shown above.

Reject

- To reject the request, click on the **Reject** button. On clicking, a confirmation alert message appears on the display screen.



Inventory Material Request

Pending Action / MR0014

1 / 1

Remark

Are you sure, you want to reject?

Rejected

Submit Cancel

Sequence: MR0014
Employee: Vishal Roy (01-9913)
Department: Delivery
Division: Solution
Section: DevelopmentSec
Practice: ERP
Branch: Bhubaneswar


Item Details

Product Category	Product Type	Item Code	Uom	Qty Required	Required Date	Issued to	Status
IT	EPBX	[00040200] EPBX (digital, Wired, Black)	Unit(s)	1.00	05-Dec-2023	Vishal Roy (01-9913)	Pending

Send message Log note Schedule activity

0 Follow 1

Figure 2-9 Pending Action/ Take Action (5)

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

- Add remarks in the textbox provided.
- Click on the **Submit** button.
- On successful submission, the request is rejected.