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	Material Management		

Material Management

USER MANUAL

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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**)

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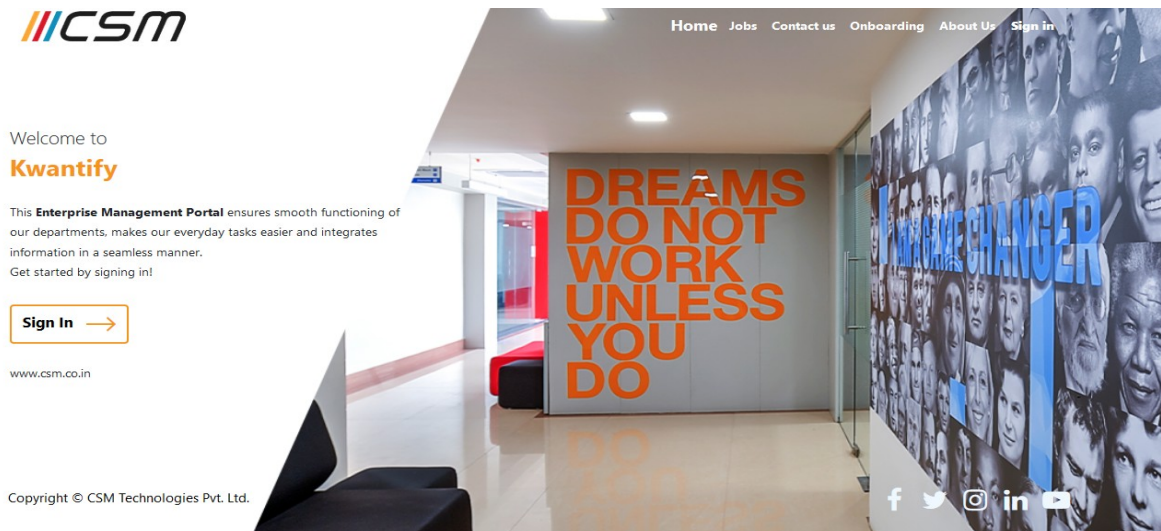


Figure 2-1 Welcome Screen

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

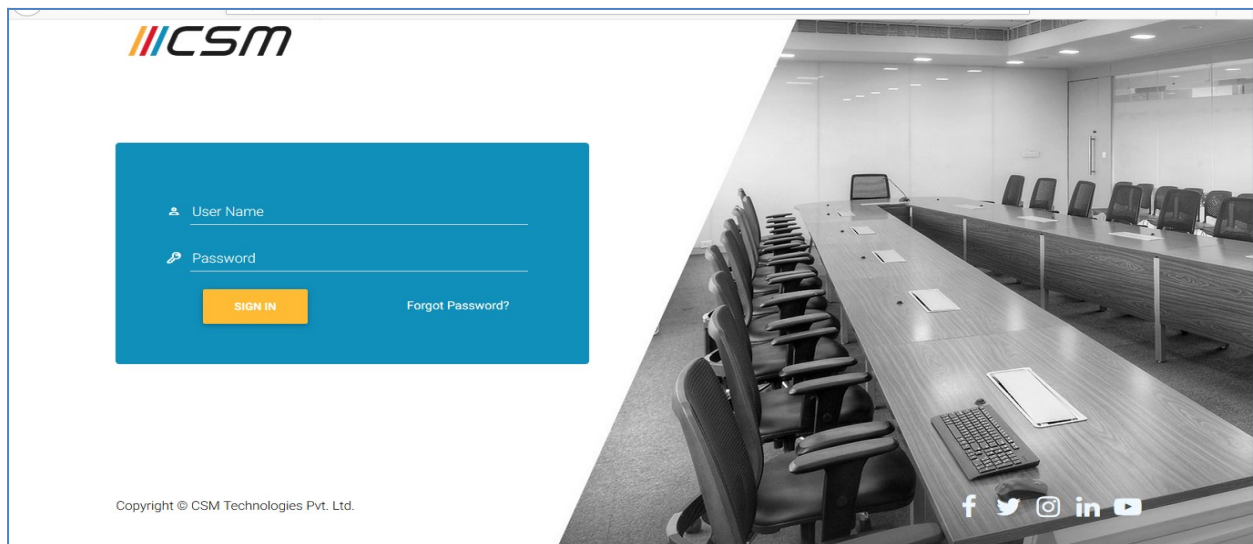



Figure 2-2 Login Screen

Refer Fig 2-2, shown above.

In the Login screen,

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

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

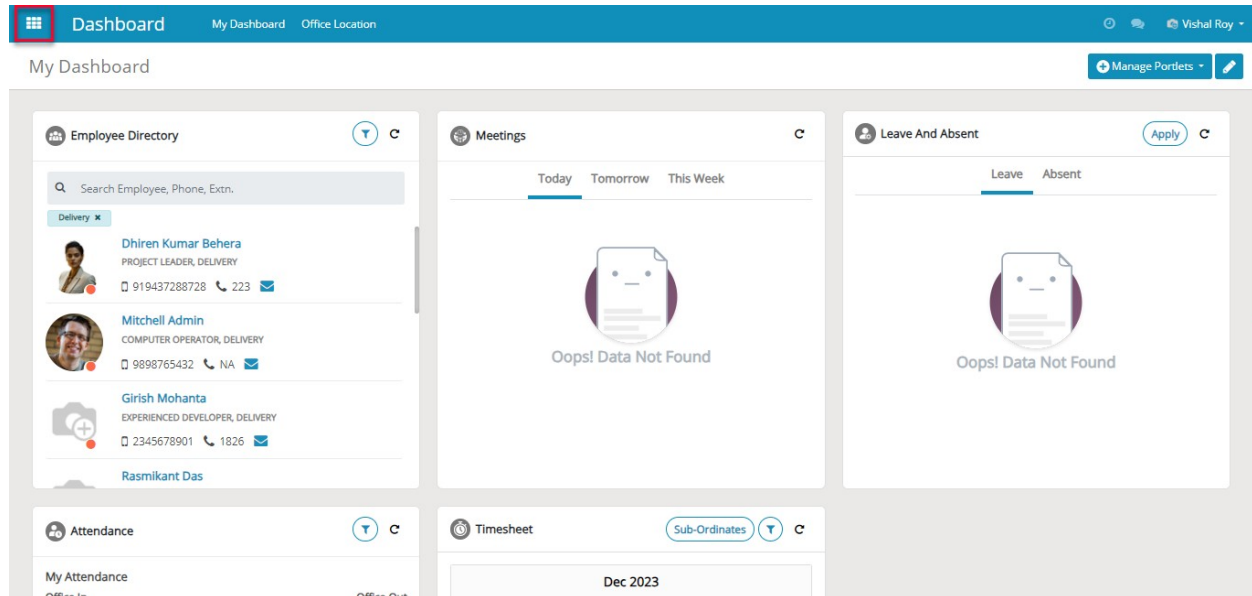



Figure 2-3 My Dashboard


- 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 GOOD RECEIPT NOTE - STORE MANAGER LOGIN

Once the purchase order is confirmed, the Store Manager User needs to receive the goods and update the quantity.

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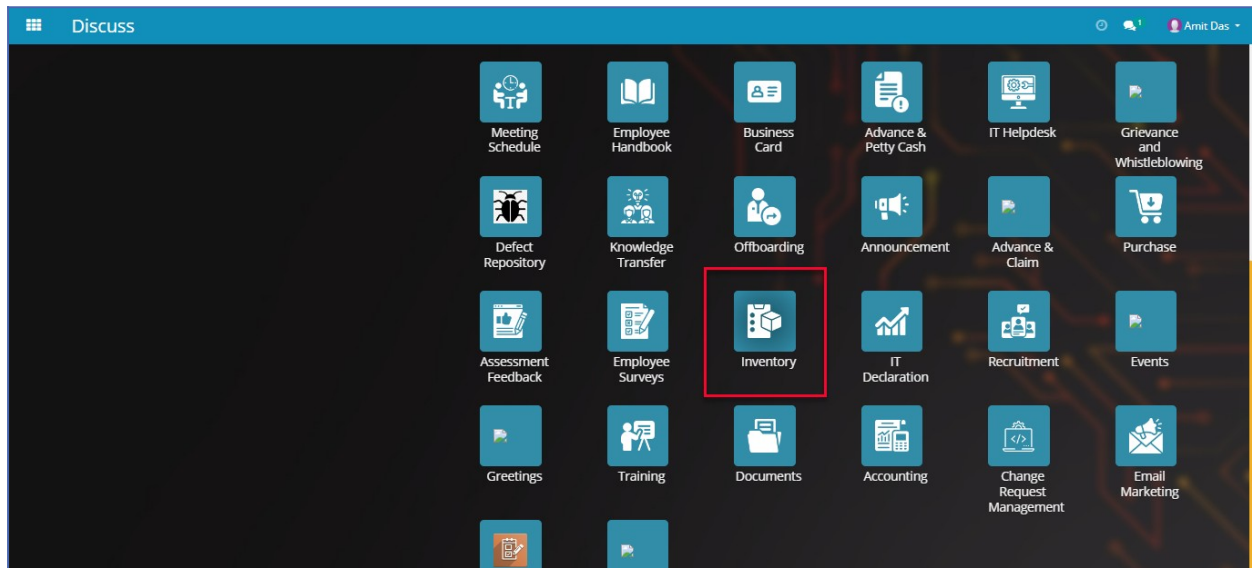


Figure 3-4 Inventory - Menu Screen

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

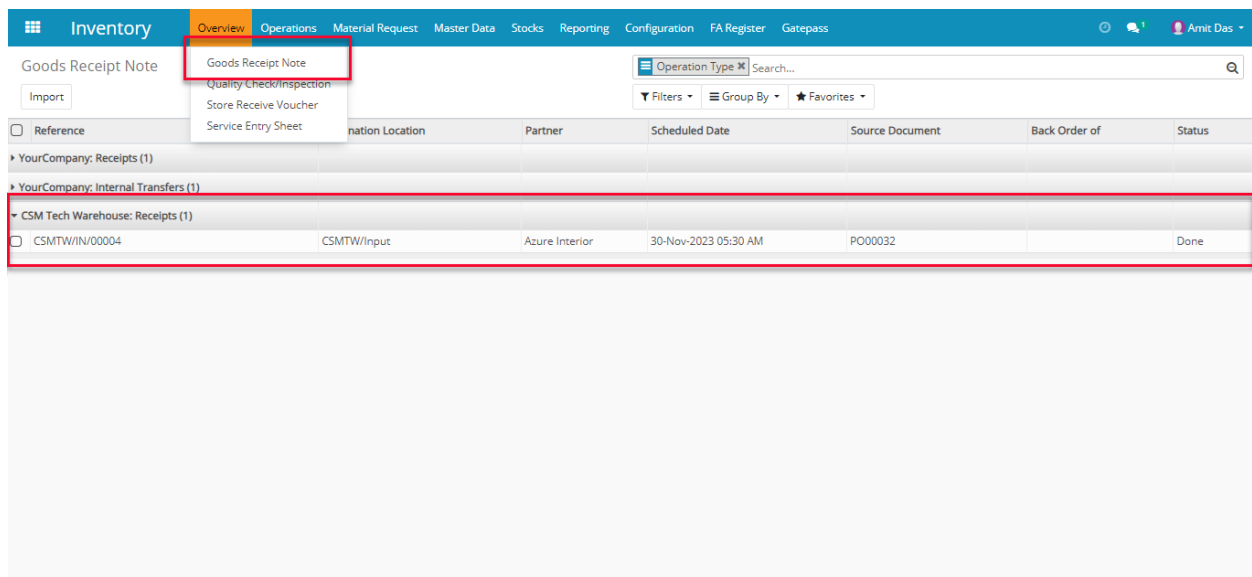

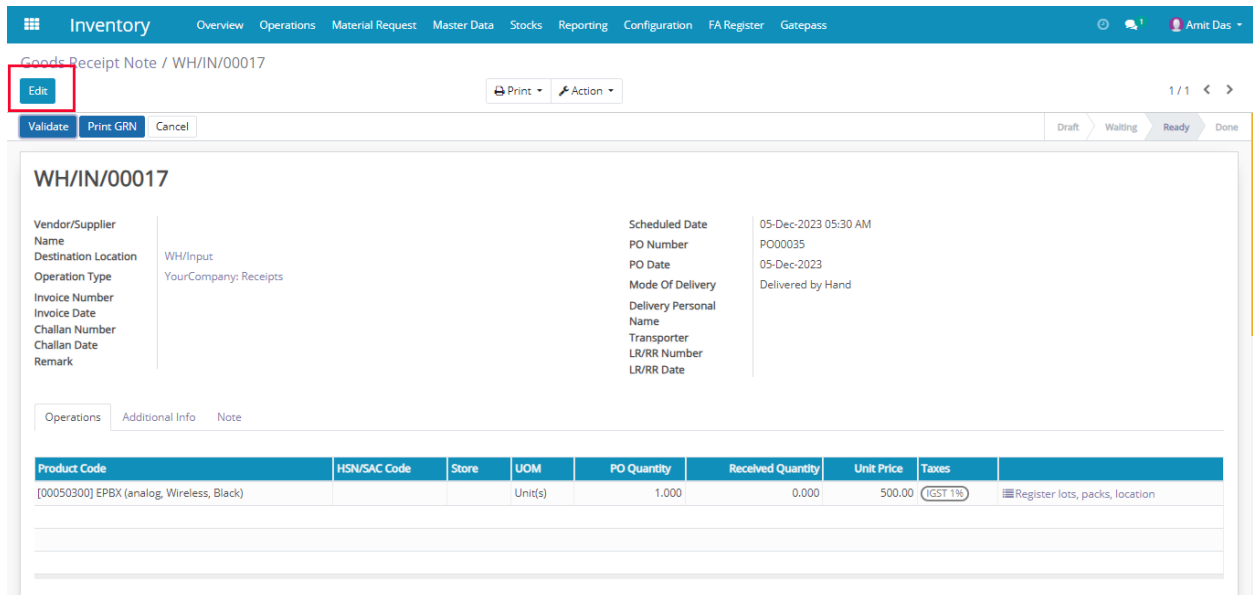


Figure 3-5 Overview - Good Receipt Note (1)

- Click on **Goods Receipt Note** link.
- On clicking the list of the Goods received and stored in the selected delivery locations are displayed in a table.

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- Click to expand and view in details.
- To get more information, click on the respective record data and get navigated to respective section.



Inventory Overview Operations Material Request Master Data Stocks Reporting Configuration FA Register Gatepass

Goods Receipt Note / WH/IN/00017

Edit Print Action

Validate Print GRN Cancel Draft Waiting Ready Done

WH/IN/00017

Vendor/Supplier Name
Destination Location
Operation Type
Invoice Number
Invoice Date
Challan Number
Challan Date
Remark

Scheduled Date
PO Number
PO Date
Mode Of Delivery
Delivery Personal Name
Transporter
LR/RR Number
LR/RR Date


05-Dec-2023 05:30 AM
PO00035
05-Dec-2023
Delivered by Hand

Operations Additional Info Note

Product Code	HSN/SAC Code	Store	UOM	PO Quantity	Received Quantity	Unit Price	Taxes	
[00050300] EPBX (analog, Wireless, Black)			Unit(s)	1.000	0.000	500.00	IGST 1%	<input type="checkbox"/> Register lots, packs, location

Figure 3-6 Overview - Good Receipt Note (2)

- To update changes, click on the **Edit** button. On clicking, the field details appear in editable format.

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Inventory Overview Operations Material Request Master Data Stocks Reporting Configuration FA Register Gatepass

Goods Receipt Note / WH/IN/00017

Save Discard 1/1 < >

Validate Print GRN Cancel Draft Waiting Ready Done

WH/IN/00017

Vendor/Supplier: ABC Consultancy

Name: WH/IN/00017

Destination Location: YourCompany: Receipts

Operation Type: Invoice Number

Invoice Date: 05-Dec-2023

Challan Number: 05-Dec-2023

Challan Date: 05-Dec-2023

Remark: OK

Scheduled Date: 05-Dec-2023 05:30 AM

PO Number: PO00035

PO Date: 05-Dec-2023

Mode Of Delivery: Delivered by Hand

Delivery Personal Name:

Transporter:

LR/RR Number:

LR/RR Date:

Operations Additional Info Note

Product Code	HSN/SAC Code	Store	UOM	PO Quantity	Received Quantity	Unit Price	Taxes	
[00050300] EPBX (analog, Wireless, Black)			Unit(s)	1.000	0.000	500.00	(GST 1%)	Register lots, packs, location

Add a line

Amount Total: 0.00
Taxes: 5.00
Total: 5.00
Amount Total in PO: 505.00

Send message Log note Schedule activity

Today

Asit Mohanty - 4 minutes ago
This transfer has been created from: PO00035

Asit Mohanty - 4 minutes ago
Status: Waiting → Ready


Asit Mohanty - 4 minutes ago
Status: Draft → Waiting

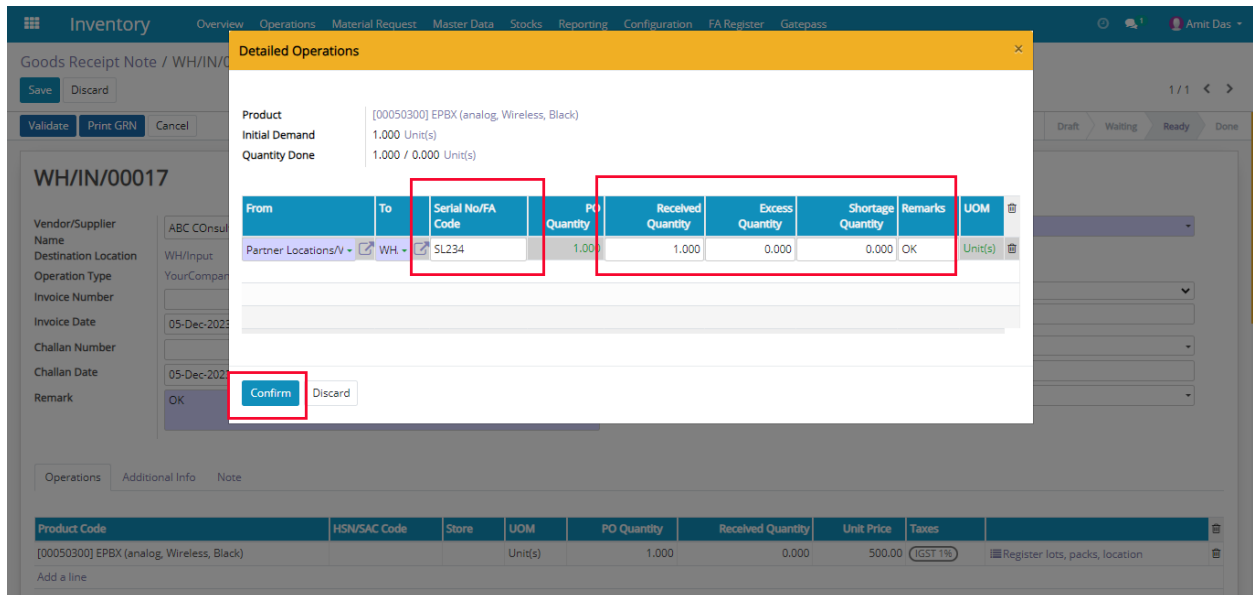
Asit Mohanty - 4 minutes ago
Mode Of Delivery: Delivered by Hand
Creation Date: December 5, 2023 5:30 AM
Scheduled Date: December 5, 2023 4:54 PM
Priority: Normal
Status: Draft

Asit Mohanty - 4 minutes ago
Transfer created

Figure 3-7 Overview - Good Receipt Note (3)

- Update the changes in the required field.
- Update the product details in the operation section.
- Click on **Register, Lots, Packs, Location** Icon to update the package received. On clicking, the detailed operation window populates on the display screen.

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The screenshot shows the 'Inventory' system interface. A 'Goods Receipt Note / WH/IN/00017' is being processed. The 'Detailed Operations' dialog is open, showing the following details:

- Product: [00050300] EPBX (analog, Wireless, Black)
- Initial Demand: 1.000 Unit(s)
- Quantity Done: 1.000 / 0.000 Unit(s)

The 'Detailed Operations' table is as follows:


From	To	Serial No/FA Code	Quantity	Received Quantity	Excess Quantity	Shortage Quantity	Remarks	UOM
Partner Locations/V	WH	SL234	1.000	1.000	0.000	0.000	OK	Unit(s)

At the bottom of the dialog, there are 'Confirm' and 'Discard' buttons. The 'Confirm' button is highlighted with a red box.

Figure 3-8 Overview - Good Receipt Note (4)

- For the given product, initial demand, and quantity done; update the Serial Number or FA Code.
- Update the Received Quantity.
- Update the Excess Quantity.
- Update the Shortage of Quantity.
- Add remarks.
- Click on the **Confirm** button.

On clicking the confirm button, the details are updated in the system and user is navigated back to the Purchase Order details section.

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Inventory Overview Operations Material Request Master Data Stocks Reporting Configuration FA Register Gatepass

Goods Receipt Note / WH/IN/00017

Edit Print Action

1 / 1 < >

Validate Print GRN Cancel

Draft Waiting Ready Done

WH/IN/00017

Vendor/Supplier Name	ABC Consultancy	Scheduled Date	05-Dec-2023 05:30 AM
Destination Location	WH/Input	PO Number	PO00035
Operation Type	YourCompany: Receipts	PO Date	05-Dec-2023
Invoice Number		Mode Of Delivery	Delivered by Hand
Invoice Date	05-Dec-2023	Delivery Personal Name	
Challan Number		Transporter	
Challan Date	05-Dec-2023	LR/RR Number	
Remark	OK	LR/RR Date	

Operations Additional Info Note

Product Code	HSN/SAC Code	Store	UOM	PO Quantity	Received Quantity	Unit Price	Taxes	
[00050300] EPBX (analog, Wireless, Black)			Unit(s)	1.000	1.000	500.00	IGST 1%	Register lots, packs, location

Figure 3-9 Overview - Good Receipt Note (5)

- Now, user needs to click on **Validate** button and validate the details updated.

Inventory Overview Operations Material Request Master Data Stocks Reporting Configuration FA Register Gatepass

Goods Receipt Note / WH/IN/00017

Edit Print Action

3 / 9 < >

Print GRN

Draft Waiting Ready **Done**

WH/IN/00017

Traceability Report


Vendor/Supplier Name	ABC Consultancy	Scheduled Date	05-Dec-2023 05:30 AM
Destination Location	WH/Input	Effective Date	05-Dec-2023 05:38 PM
Operation Type	YourCompany: Receipts	PO Number	PO00035
Invoice Number		PO Date	05-Dec-2023
Invoice Date	05-Dec-2023	Mode Of Delivery	Delivered by Hand
Challan Number		Delivery Personal Name	
Challan Date	05-Dec-2023	Transporter	
Remark	OK	LR/RR Number	
		LR/RR Date	

Operations Additional Info Note

Product Code	HSN/SAC Code	Store	UOM	PO Quantity	Received Quantity	Unit Price	Taxes	
[00050300] EPBX (analog, Wireless, Black)			Unit(s)	1.000	1.000	0.00	IGST 1%	Register lots, packs, location

Figure 3-10 Overview - Good Receipt Note (6)

Once the validation of the goods received is done, its pending at the authority end for quality check.

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3.1.1.2 QUALITY CHECK/INSPECTION

The designated department authority needs to assess the quality of the product received from the supplier and make sure quality standards are maintained throughout the supply chain.

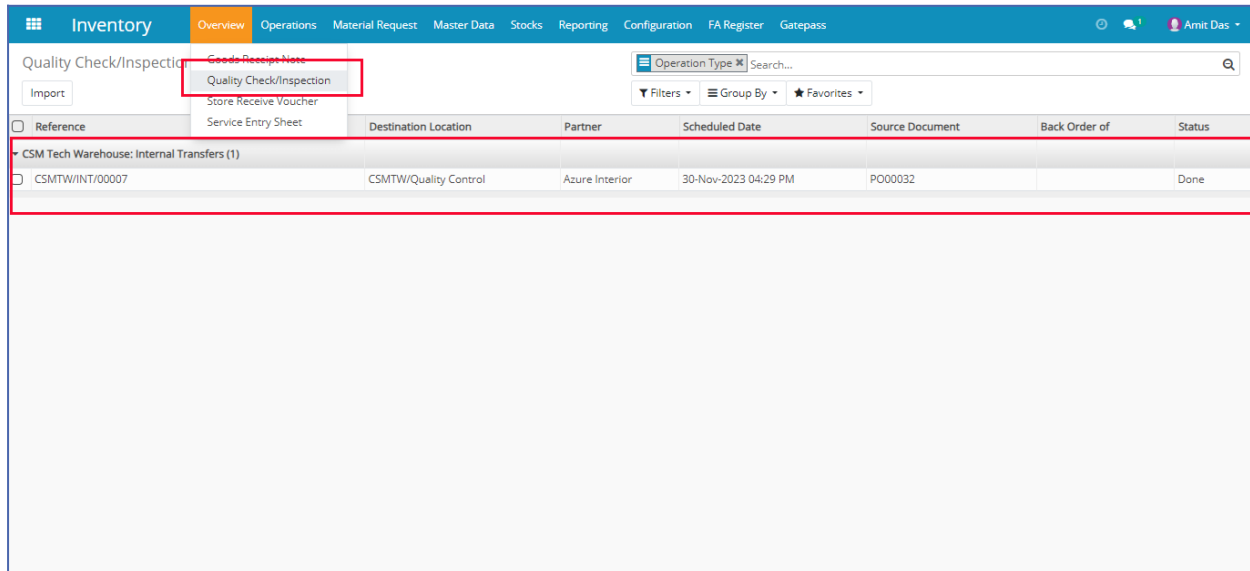

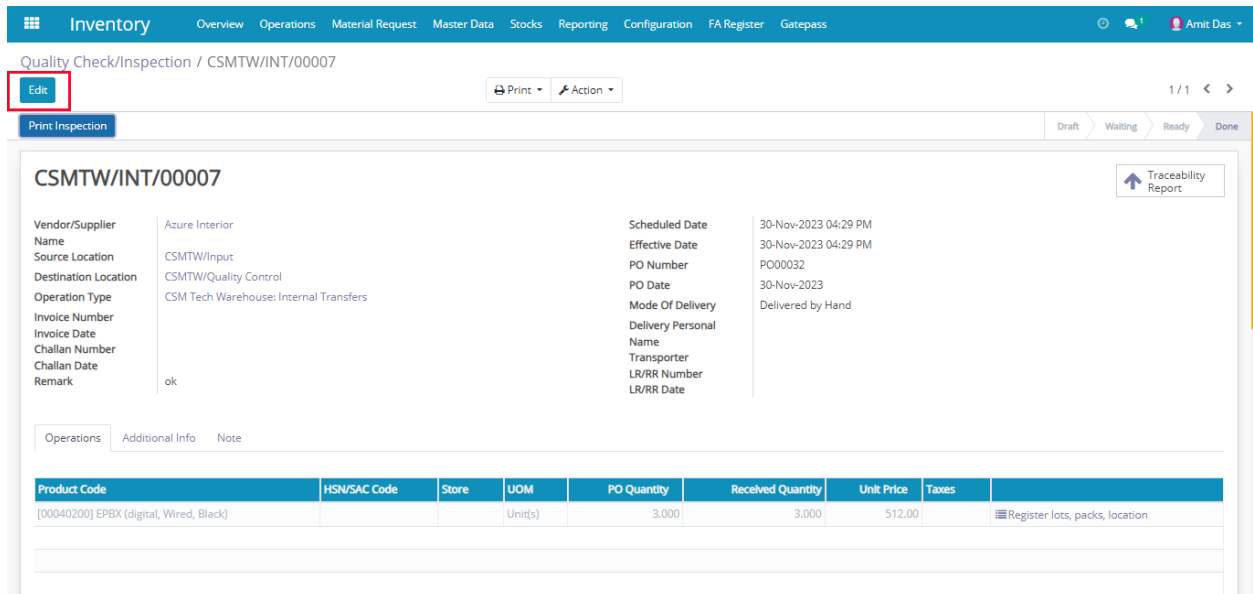


Figure 3-11 Quality Check/Inspection (1)

- Click on **Quality Check Inspection** link.
- On clicking the list of the Goods received and stored in the warehouse are displayed in a table.
- Click to expand and view in details.
- To get more information, click on the respective record data and get navigated to respective section.

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Quality Check/Inspection / CSMTW/INT/00007

Edit Print Action

Print Inspection Draft Waiting Ready Done

CSMTW/INT/00007

Traceability Report

Vendor/Supplier Name: Azure Interior
 Source Location: CSMTW/Input
 Destination Location: CSMTW/Quality Control
 Operation Type: CSM Tech Warehouse: Internal Transfers
 Invoice Number:
 Invoice Date:
 Challan Number:
 Challan Date:
 Remark: ok

Scheduled Date: 30-Nov-2023 04:29 PM
 Effective Date: 30-Nov-2023 04:29 PM
 PO Number: PO00032
 PO Date: 30-Nov-2023
 Mode Of Delivery: Delivered by Hand
 Delivery Personal Name:
 Transporter:
 LR/RR Number:
 LR/RR Date:

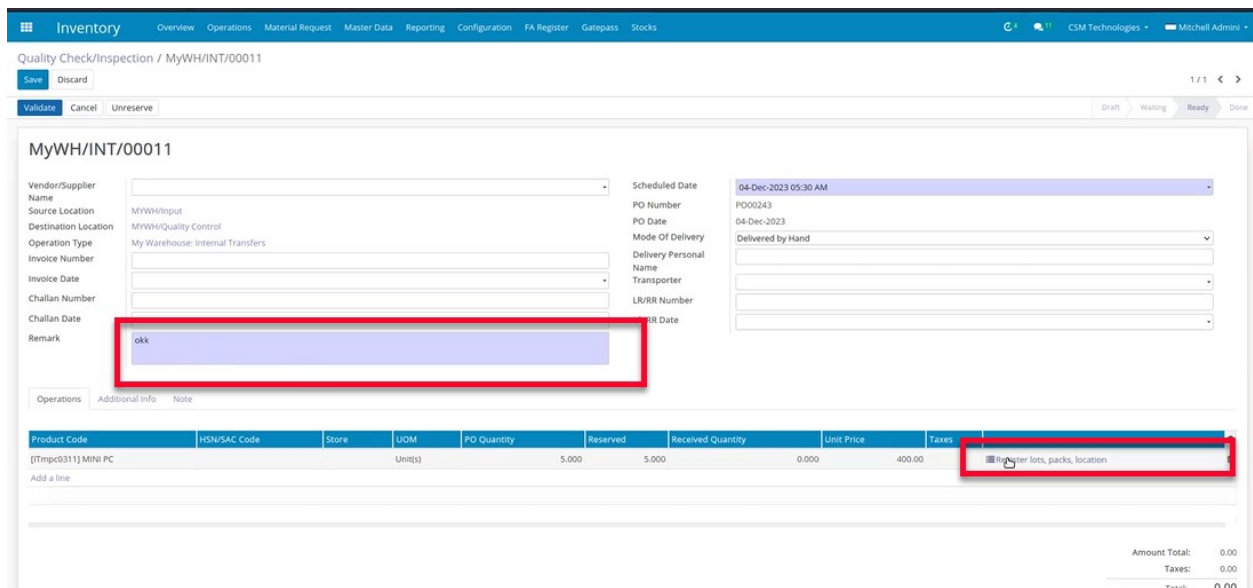
Operations Additional Info Note

Product Code	HSN/SAC Code	Store	UOM	PO Quantity	Received Quantity	Unit Price	Taxes
[00040200] EPBX (digital, Wired, Black)			Unit(s)	3.000	3.000	512.00	

Register lots, packs, location

Figure 3-12 Quality Check/Inspection (2)

- To update changes, click on the **Edit** button. On clicking, the field details appear in editable format.



Quality Check/Inspection / MyWH/INT/00011

Save Discard

Validate Cancel Unreserve Draft Waiting Ready Done

MyWH/INT/00011

Vendor/Supplier Name: MyWH/Input
 Source Location: MyWH/Quality Control
 Destination Location: My Warehouse: Internal Transfers
 Operation Type: My Warehouse: Internal Transfers
 Invoice Number:
 Invoice Date:
 Challan Number:
 Challan Date:
 Remark: ok

Scheduled Date: 04-Dec-2023 05:30 AM
 PO Number: PO00243
 PO Date: 04-Dec-2023
 Mode Of Delivery: Delivered by Hand
 Delivery Personal Name:
 Transporter:
 LR/RR Number:
 LR/RR Date:

Operations Additional Info Note


Product Code	HSN/SAC Code	Store	UOM	PO Quantity	Reserved	Received Quantity	Unit Price	Taxes
[Tmnc0311] MINI PC			Unit(s)	5.000	5.000	0.000	400.00	

Register lots, packs, location

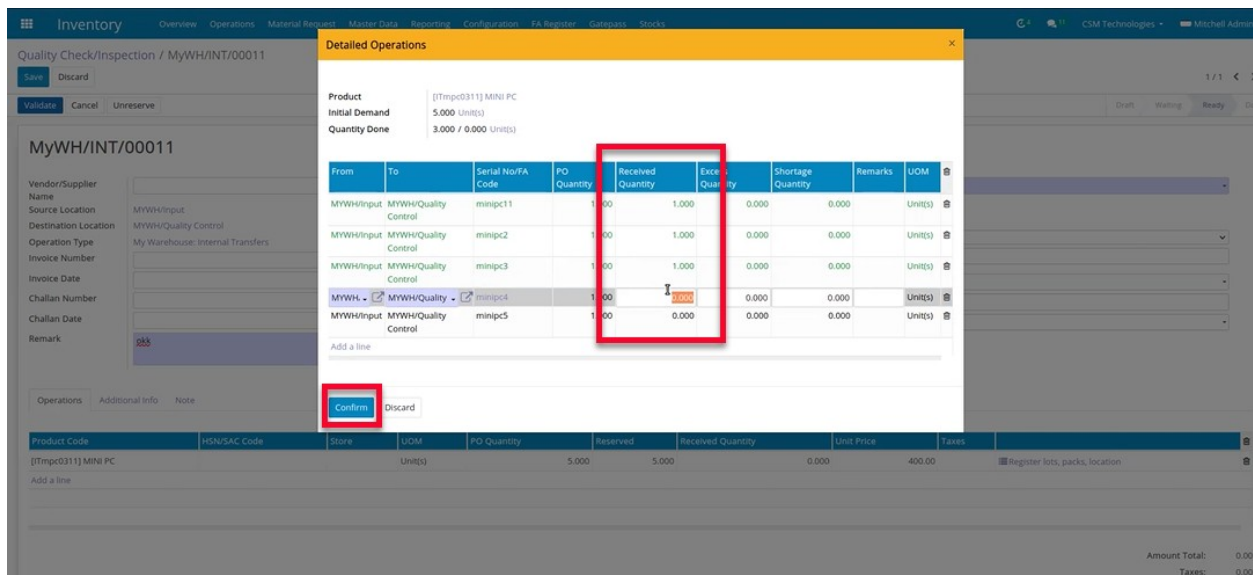
Amount Total: 0.00
 Taxes: 0.00
 Total: 0.00

Figure 3-13 Quality Check/Inspection (3)

- On clicking, add comments in the textbox for goods received.
- Update any other changes if required.

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- If any product is found defective or damaged, or want to update the product receipt, then Update the product details in the operation section.
- Click on **Register, Lots, Packs, Location** Icon to update the package received. On clicking, the detailed operation window populates on the display screen.



The screenshot shows the 'Detailed Operations' window for a Quality Check/Inspection. The window displays a table with the following data:


From	To	Serial No/FA Code	PO Quantity	Received Quantity	Exce Quantity	Shortage Quantity	Remarks	UOM
MYWH/Input	MYWH/Quality Control	minipc11	1.00	1.000	0.000	0.000		Units(s)
MYWH/Input	MYWH/Quality Control	minipc2	1.00	1.000	0.000	0.000		Units(s)
MYWH/Input	MYWH/Quality Control	minipc3	1.00	1.000	0.000	0.000		Units(s)
MYWH - MYWH/Quality	MYWH/Quality Control	minipc4	1.00	1.000	0.000	0.000		Units(s)
MYWH/Input	MYWH/Quality Control	minipc5	1.00	0.000	0.000	0.000		Units(s)

The 'Received Quantity' column is highlighted with a red box. The 'Confirm' button is highlighted with a red box.

Figure 3-14 Quality Check/Inspection (4)

- Update the Received Quantity.
- Click on the **Confirm** button.

On clicking the confirm button, the details are updated in the system and user is navigated back to the Quality/Check Up Inspection details section.

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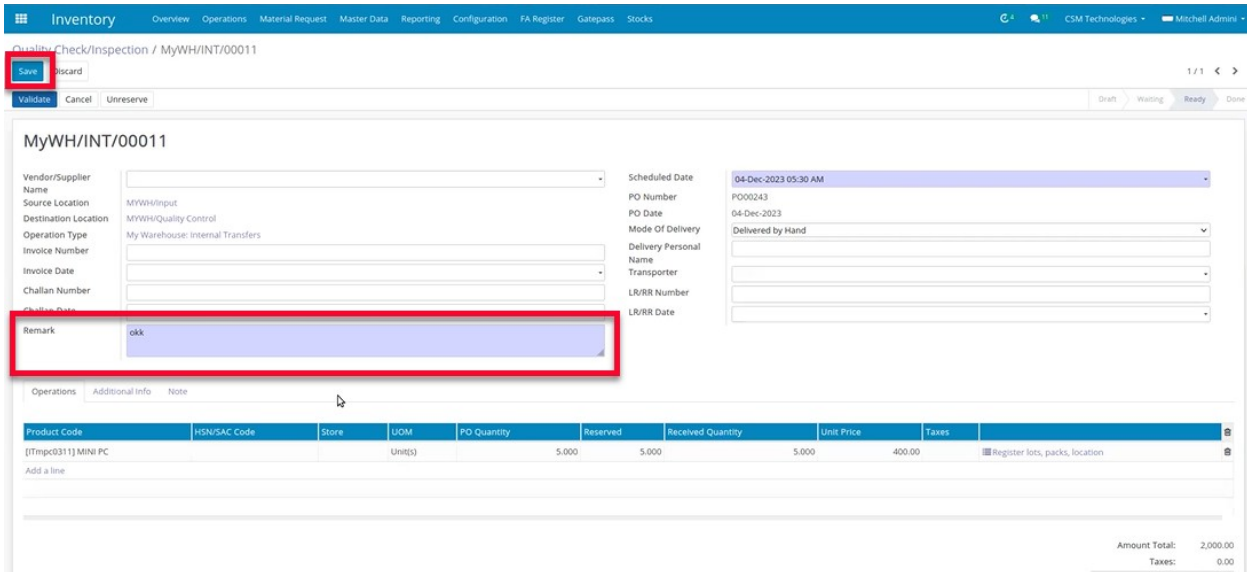



Figure 3-15 Quality Check/Inspection (5)

- Add remarks if any in the textbox.
- Click on the **Save** button.
- Once saved, click on the **Validate** button. Once validated, the quality of the product is confirmed.

3.1.1.3 STORE RECEIVE VOUCHER

Once validated, the product is moved to the store. The Store Manager needs to update stock the product as per their category, such as IT, Admin etc.

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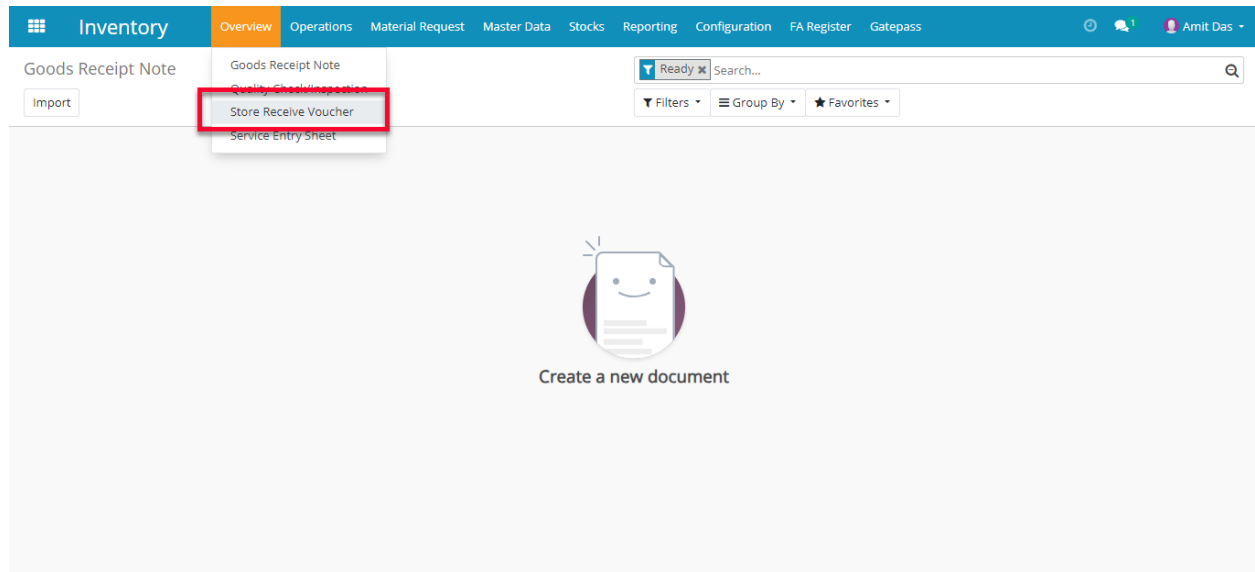

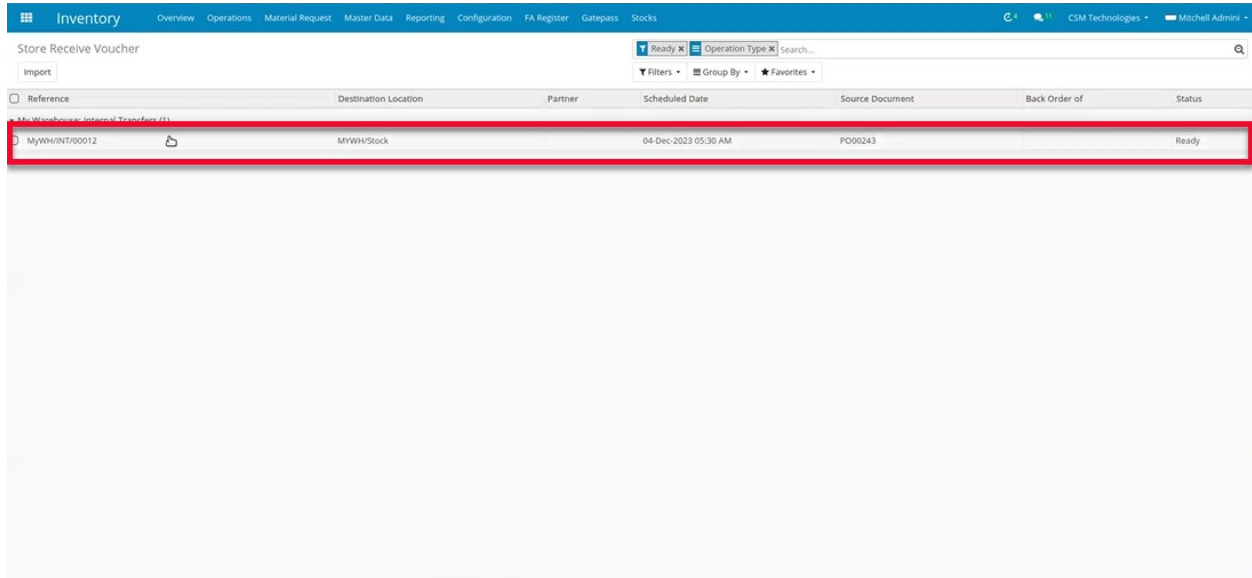


Figure 3-16 Store Receive Voucher (1)

- Click on the **Store Receive Voucher** link.
- On clicking the list of the Goods received and to be stored in the warehouse are displayed in a table.
- Click to expand and view in details.

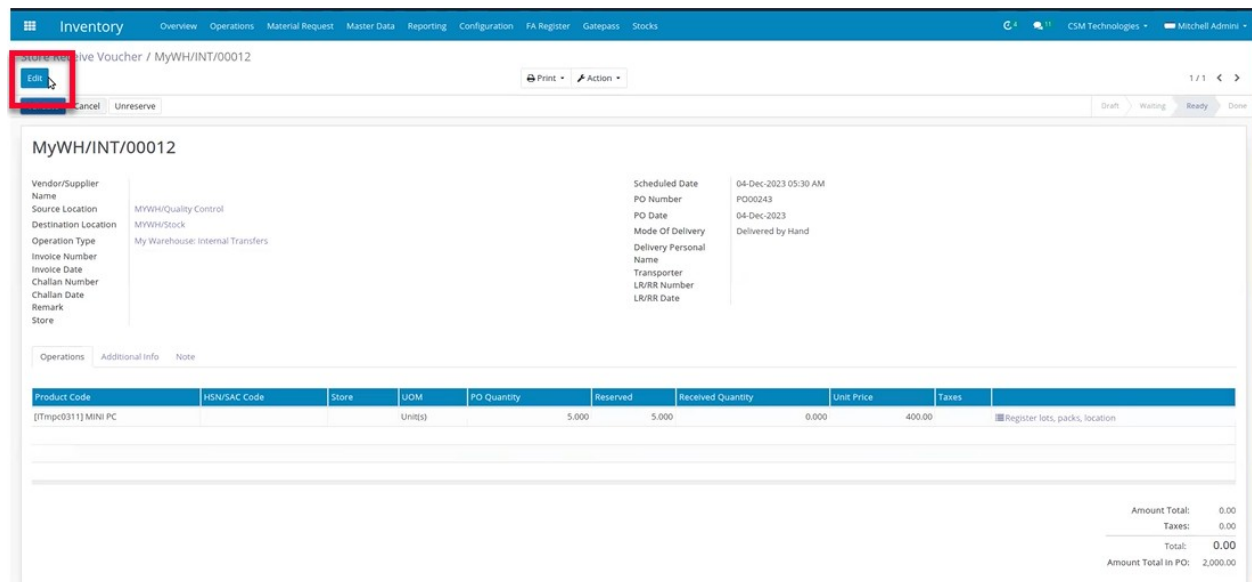
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Reference	Destination Location	Partner	Scheduled Date	Source Document	Back Order of	Status
MyWH/INT/00012	MYWH/Stock		04-Dec-2023 05:30 AM	PO00243		Ready

Figure 3-17 Store Receive Voucher (2)

- To get more information, click on the respective record data and get navigated to respective section.




MyWH/INT/00012

Vendor/Supplier Name: MYWH/Quality Control
Source Location: MYWH/Stock
Destination Location: MYWH/Stock
Operation Type: My Warehouse: Internal Transfers
Invoice Number:
Invoice Date:
Challan Number:
Challan Date:
Remark:
Store:
Scheduled Date: 04-Dec-2023 05:30 AM
PO Number: PO00243
PO Date: 04-Dec-2023
Mode Of Delivery: Delivered by Hand
Delivery Personal Name:
Transporter:
LR/RR Number:
LR/RR Date:
Amount Total: 0.00
Taxes: 0.00
Total: 0.00
Amount Total in PO: 2,000.00

Product Code	HSN/SAC Code	Store	UOM	PO Quantity	Reserved	Received Quantity	Unit Price	Taxes	Amount
[Ttmpc0311] MINI PC			UNITS	5,000	5,000		400.00		2,000.00

Figure 3-18 Store Receive Voucher (3)

- To update changes, click on the **Edit** button. On clicking, the field details appear in editable format.

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	<h1>Material Management</h1>		

Inventory

OverviewOperationsMaterial RequestMaster DataReportingConfigurationFA RegisterGatepassStocks

CSM Technologies Mitchell Admin

Store Receive Voucher / MyWH/INT/00012

SaveDiscard

1 / 1 <>

ValidateCancelUnreserve

DraftWaitingReadyDone

MyWH/INT/00012

Vendor/Supplier Name

Source Location

Destination Location

Operation Type

Invoice Number

Invoice Date

Challan Number

Challan Date

Remark

Store

Scheduled Date

PO Number

PO Date

Mode Of Delivery

Delivery Personal Name

Transporter

LR/RR Number

LR/RR Date

IT

BSS

Admin

IoT

Product Code

HSN/SAC Code

Store

UOM

PO Quantity

Reserved

Received Quantity

Unit Price

Taxes

[ITmpc0311] MINI PC

Units

5,000

5,000

0.000

400.00

Register lots, packs, location

Figure 3-19 Store Receive Voucher (4)

- Add remarks .
- Select the Store Category.
- Click on **Register, Lots, Packs, Location** Icon to update the package received. On clicking, the detailed operation window populates on the display screen.

Inventory

OverviewOperationsMaterial RequestMaster DataReportingConfigurationFA RegisterGatepassStocks

CSM Technologies Mitchell Admin

Store Receive Voucher / MyWH/INT/00012

SaveDiscard

1 / 1 <>

ValidateCancelUnreserve

DraftWaitingReadyDone

MyWH/INT/00012

Vendor/Supplier Name

Source Location

Destination Location

Operation Type

Invoice Number

Invoice Date

Challan Number

Challan Date

Remark

Store

Scheduled Date

PO Number

PO Date

Mode Of Delivery

Delivery Personal Name

Transporter

LR/RR Number

LR/RR Date

IT

BSS

Admin

IoT

Product Code

HSN/SAC Code

Store

UOM

PO Quantity

Reserved

Received Quantity

Unit Price

Taxes

[ITmpc0311] MINI PC

Units

5,000

5,000

0.000

400.00

Register lots, packs, location

Product

Initial Demand

Quantity Done

[ITmpc0311] MINI PC

5,000 Units(s)


4,000 / 0,000 Units(s)

From	To	Serial No/FA Code	PO Quantity	Received Quantity	Excess Quantity	Shortage Quantity	Remarks	UOM
MYWH/Quality Control	MYWH/Stock	minipc11	1,000	1,000	0.000	0.000		Units(s)
MYWH/Quality Control	MYWH/Stock	minipc2	1,000	1,000	0.000	0.000		Units(s)
MYWH/Quality Control	MYWH/Stock	minipc3	1,000	1,000	0.000	0.000		Units(s)
MYWH/Quality Control	MYWH/Stock	minipc4	1,000	1,000	0.000	0.000		Units(s)
MYWH/Quality Control	MYWH/Stock	minipc5	1,000	1,000	0.000	0.000		Units(s)

ConfirmDiscard

Figure 3-20 Store Receive Voucher (5)

For the given product,

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- Update the Received Quantity.
- Add remarks.
- Click on the **Confirm** button.

On clicking the confirm button, the details are updated in the system and user is navigated back to the Store Receive Voucher details section.

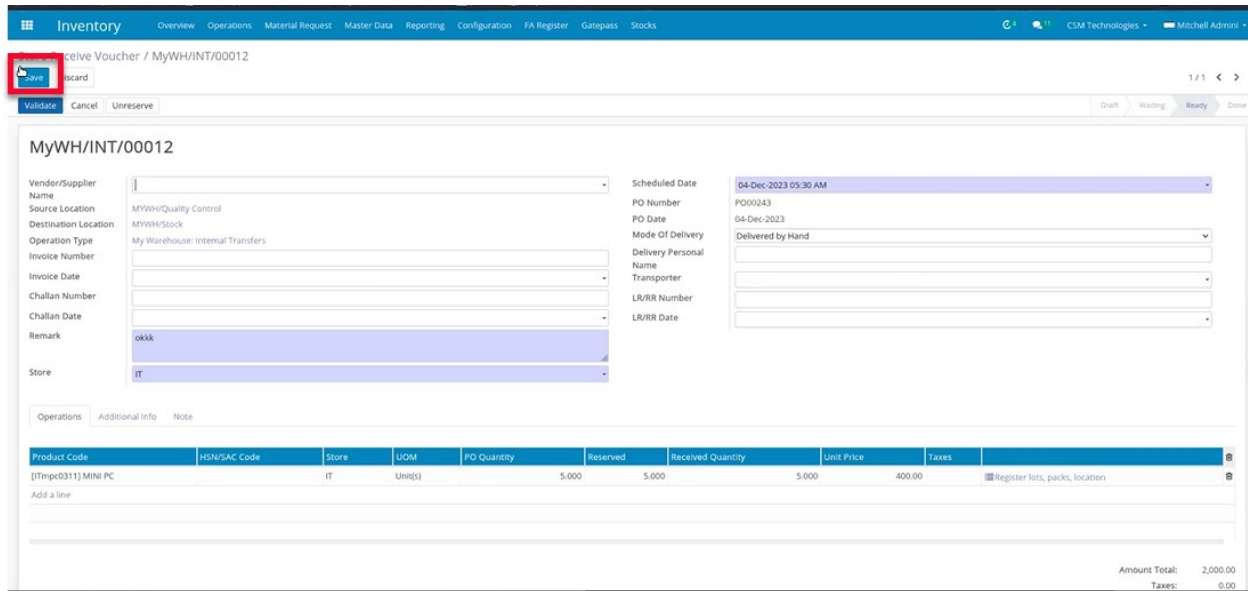



Figure 3-21 Store Receive Voucher (6)

- Click on the **Save** button. Now, the user needs to validate the record added.

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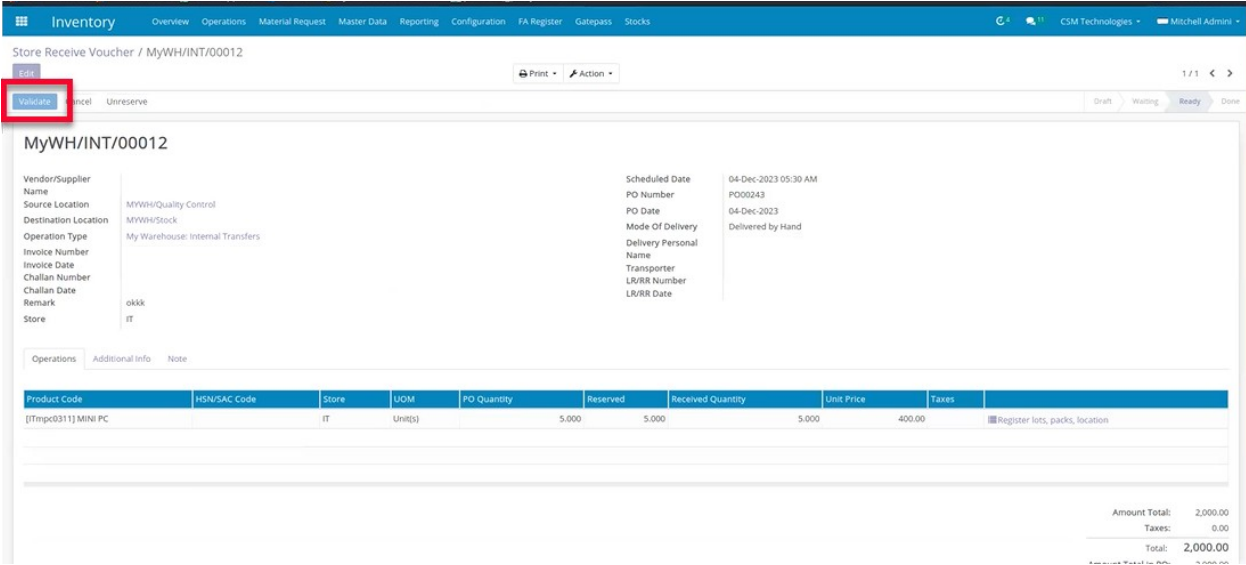


Figure 3-22 Store Receive Voucher (7)

- Click on **Validate** button.

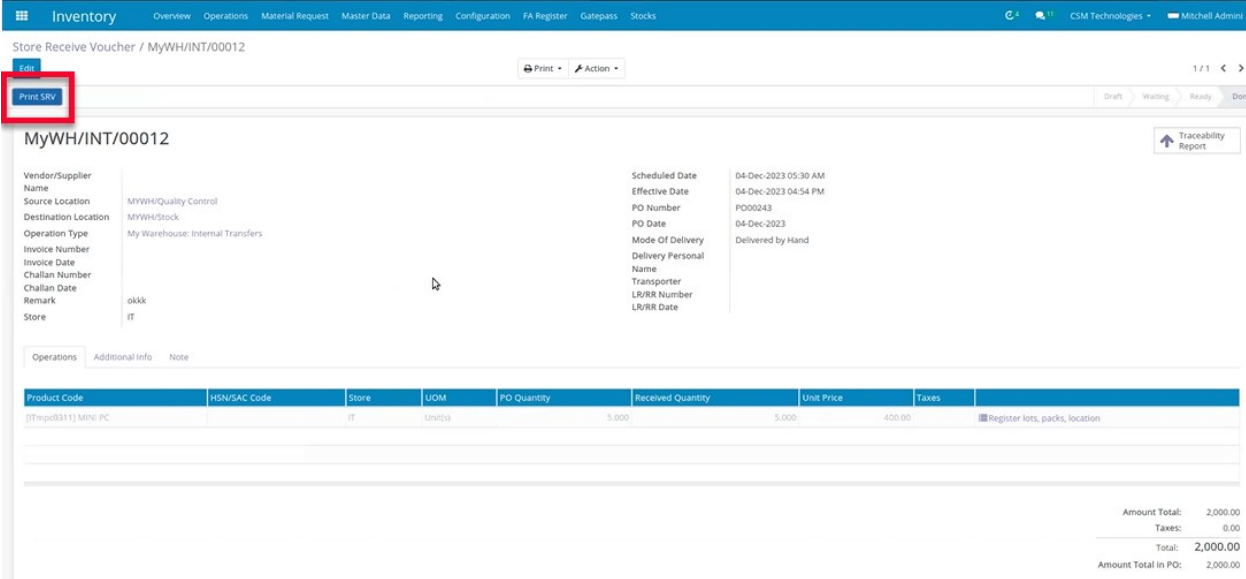



Figure 3-23 Store Receive Voucher (8)

Once validated, the Store Receive Voucher is ready to be print.

- To take a print of Store Receive Voucher, click on the **Print SRV** button.

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3.1.1.4 STOCKS

The Items received and updated in **Store**. The designated authority has the facility to issue item and view the list of issued items in the Stock Section.

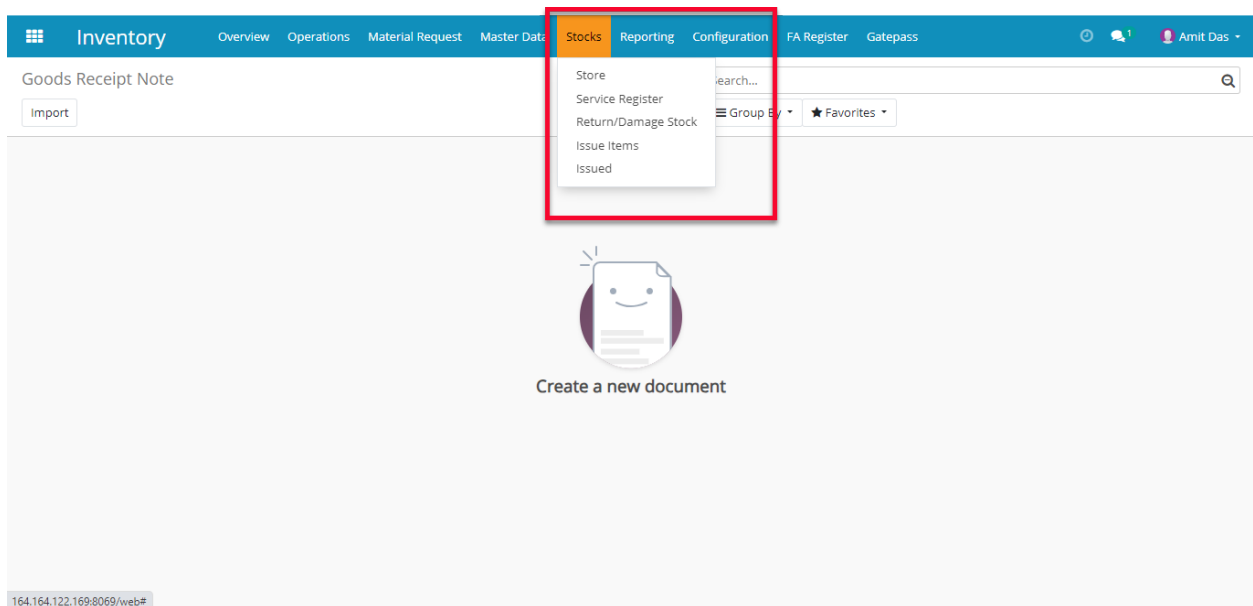



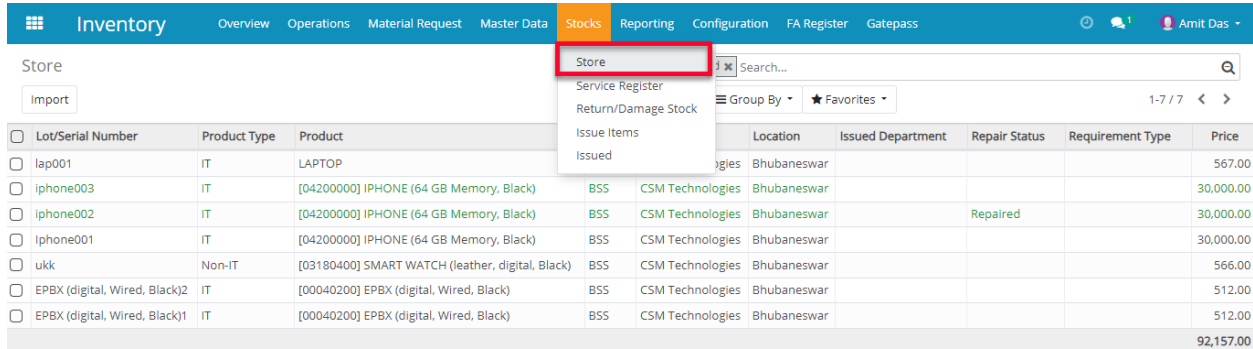
Figure 3-24 Stocks

Refer to the link highlighted in the figure 3-76 shown above.

3.1.1.4.1 STORE

The list of the Items received are kept in the store. To view the record data, click on the **Store** link.

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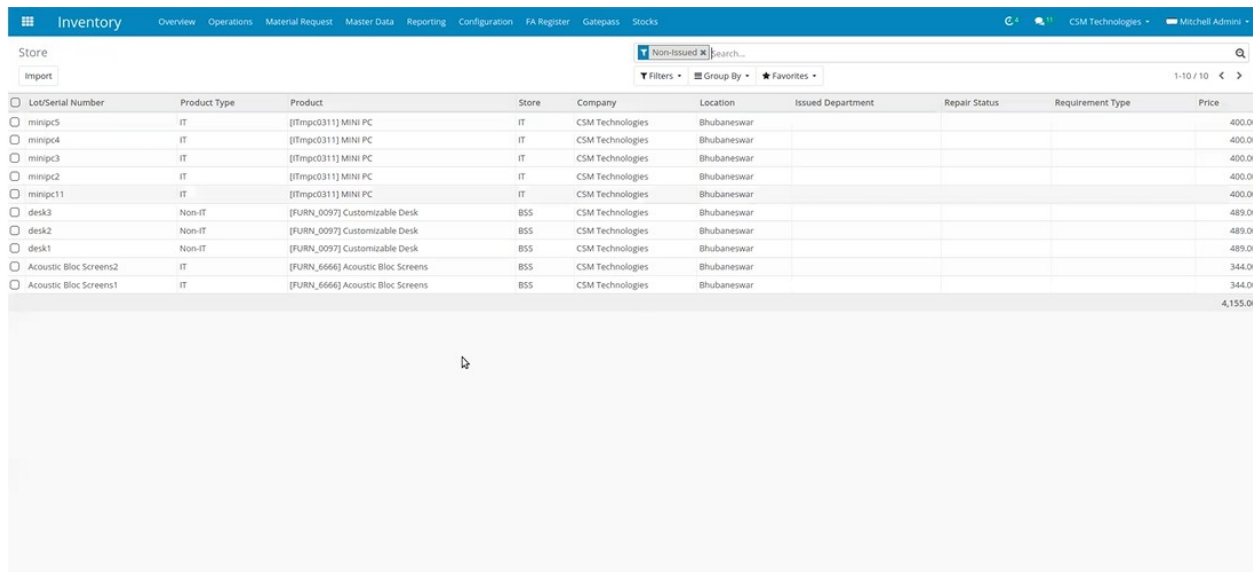


Lot/Serial Number	Product Type	Product	Store	Company	Location	Issued Department	Repair Status	Requirement Type	Price
lap001	IT	LAPTOP							567.00
iphone003	IT	[04200000] IPHONE (64 GB Memory, Black)	BSS	CSM Technologies	Bhubaneswar				30,000.00
iphone002	IT	[04200000] IPHONE (64 GB Memory, Black)	BSS	CSM Technologies	Bhubaneswar		Repaired		30,000.00
iphone001	IT	[04200000] IPHONE (64 GB Memory, Black)	BSS	CSM Technologies	Bhubaneswar				30,000.00
ukk	Non-IT	[03180400] SMART WATCH (leather, digital, Black)	BSS	CSM Technologies	Bhubaneswar				566.00
EPBX (digital, Wired, Black)2	IT	[00040200] EPBX (digital, Wired, Black)	BSS	CSM Technologies	Bhubaneswar				512.00
EPBX (digital, Wired, Black)1	IT	[00040200] EPBX (digital, Wired, Black)	BSS	CSM Technologies	Bhubaneswar				512.00
									92,157.00

164.164.122.169:8069/web#menu_id=2154&action=2906

Figure 3-25 Store (1)

Take reference from the Figure 3-77 shown above. The list of the records is displayed in a table.




Lot/Serial Number	Product Type	Product	Store	Company	Location	Issued Department	Repair Status	Requirement Type	Price
minipc5	IT	[ITmpc0311] MINI PC	IT	CSM Technologies	Bhubaneswar				400.00
minipc4	IT	[ITmpc0311] MINI PC	IT	CSM Technologies	Bhubaneswar				400.00
minipc3	IT	[ITmpc0311] MINI PC	IT	CSM Technologies	Bhubaneswar				400.00
minipc2	IT	[ITmpc0311] MINI PC	IT	CSM Technologies	Bhubaneswar				400.00
minipc11	IT	[ITmpc0311] MINI PC	IT	CSM Technologies	Bhubaneswar				400.00
desk3	Non-IT	[FURN_0097] Customizable Desk	BSS	CSM Technologies	Bhubaneswar				489.00
desk2	Non-IT	[FURN_0097] Customizable Desk	BSS	CSM Technologies	Bhubaneswar				489.00
desk1	Non-IT	[FURN_0097] Customizable Desk	BSS	CSM Technologies	Bhubaneswar				489.00
Acoustic Bloc Screens2	IT	[FURN_6666] Acoustic Bloc Screens	BSS	CSM Technologies	Bhubaneswar				344.00
Acoustic Bloc Screens1	IT	[FURN_6666] Acoustic Bloc Screens	BSS	CSM Technologies	Bhubaneswar				344.00
									4,155.00

Figure 3-26 Store (2)

Take reference from the Figure 3-78 Shown above.

Here, the list of the Items in stock are displayed with Lot or Serial number, Product Type, Store Name, Company Name, Location, Name of the

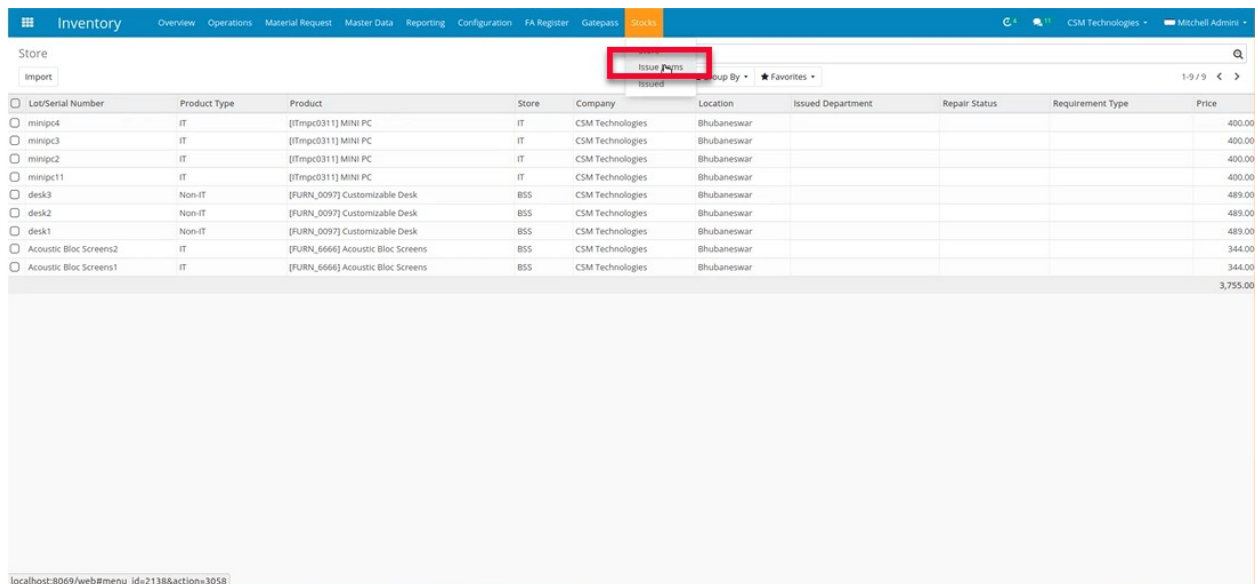
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Department to whom the Product is Issued, Repair Status if any, Requirement Type, and Price.

Note: Once the product is available in the stock, the Store Manager User has the facility to Unhold the Material Request and Assign the Product to the requester. Take Reference from the Section 3.3.1 discussed above.

3.1.1.4.2 ISSUE ITEMS

If in case no material request is raised, then the Store Manager has the facility to **Issue Item** directly to the requester. However, the issuance of the item depends upon the availability in the stocks.




The screenshot shows the 'Inventory' management interface. The 'Issue' dropdown menu is open, and the 'Issue Items' option is highlighted. Below the menu, a table displays the available inventory items for issuance.

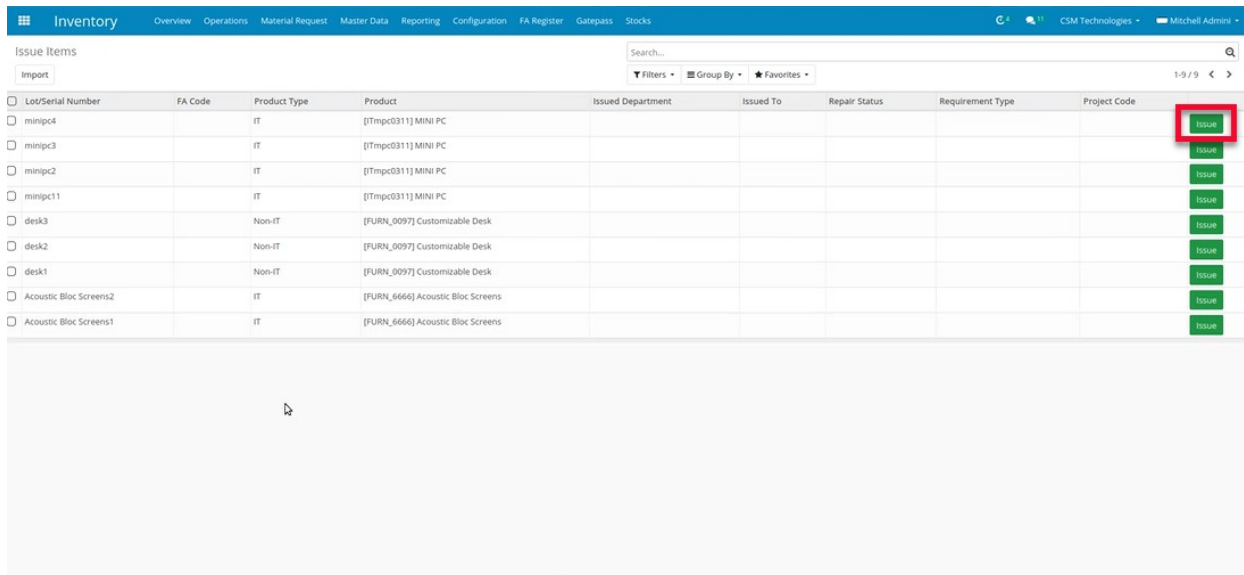
Lot/Serial Number	Product Type	Product	Store	Company	Location	Issued Department	Repair Status	Requirement Type	Price
<input type="checkbox"/> minipc4	IT	[ITmpc0311] MINI PC	IT	CSM Technologies	Bhubaneswar				400.00
<input type="checkbox"/> minipc3	IT	[ITmpc0311] MINI PC	IT	CSM Technologies	Bhubaneswar				400.00
<input type="checkbox"/> minipc2	IT	[ITmpc0311] MINI PC	IT	CSM Technologies	Bhubaneswar				400.00
<input type="checkbox"/> minipc11	IT	[ITmpc0311] MINI PC	IT	CSM Technologies	Bhubaneswar				400.00
<input type="checkbox"/> desk3	Non-IT	[FURN_0097] Customizable Desk	BSS	CSM Technologies	Bhubaneswar				489.00
<input type="checkbox"/> desk2	Non-IT	[FURN_0097] Customizable Desk	BSS	CSM Technologies	Bhubaneswar				489.00
<input type="checkbox"/> desk1	Non-IT	[FURN_0097] Customizable Desk	BSS	CSM Technologies	Bhubaneswar				489.00
<input type="checkbox"/> Acoustic Bloc Screens2	IT	[FURN_6666] Acoustic Bloc Screens	BSS	CSM Technologies	Bhubaneswar				344.00
<input type="checkbox"/> Acoustic Bloc Screens1	IT	[FURN_6666] Acoustic Bloc Screens	BSS	CSM Technologies	Bhubaneswar				344.00
									3,755.00

Figure 3-27 Issue Items (1)

Refer to the link shown in the Figure 3-79 above.

On clicking the link, the list of the Items available are displayed in a table.

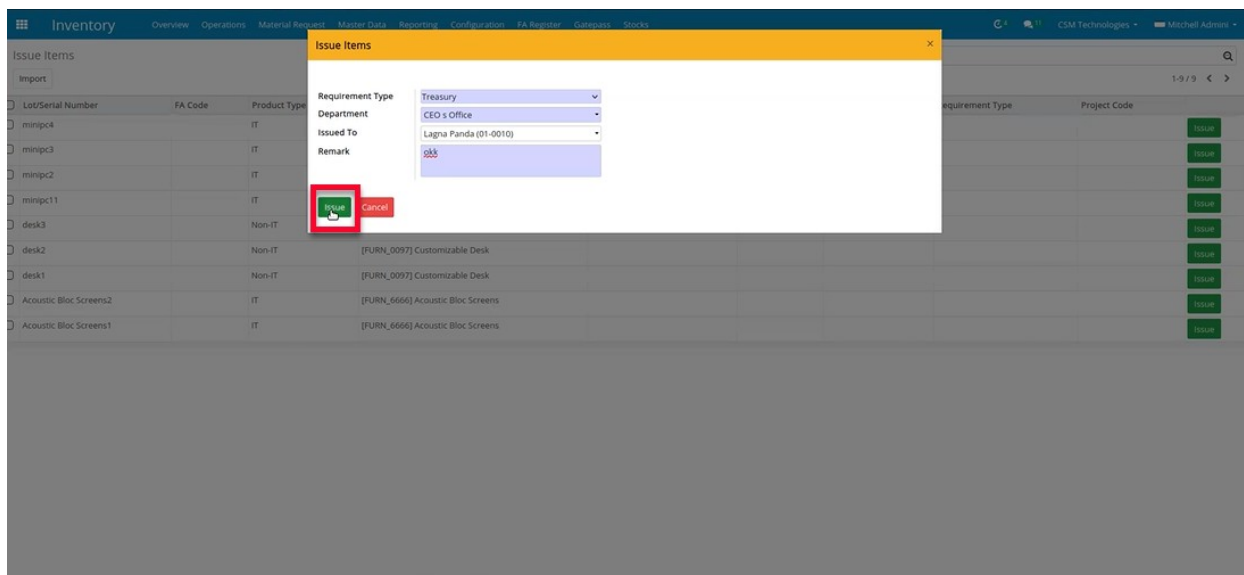
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Lot/Serial Number	FA Code	Product Type	Product	Issued Department	Issued To	Repair Status	Requirement Type	Project Code
minip4		IT	[Ttmpc0311] MINI PC					
minip3		IT	[Ttmpc0311] MINI PC					
minip2		IT	[Ttmpc0311] MINI PC					
minip1		IT	[Ttmpc0311] MINI PC					
desk3		Non-IT	[FURN_0097] Customizable Desk					
desk2		Non-IT	[FURN_0097] Customizable Desk					
desk1		Non-IT	[FURN_0097] Customizable Desk					
Acoustic Bloc Screens2		IT	[FURN_6666] Acoustic Bloc Screens					
Acoustic Bloc Screens1		IT	[FURN_6666] Acoustic Bloc Screens					

Figure 3-28 Issue Items (2)

- Click on the **Issue** button. On clicking, option to update the requirement information populates on the display screen.




Lot/Serial Number	FA Code	Product Type	Product	Issued Department	Issued To	Repair Status	Requirement Type	Project Code
minip4		IT	[Ttmpc0311] MINI PC					
minip3		IT	[Ttmpc0311] MINI PC					
minip2		IT	[Ttmpc0311] MINI PC					
minip1		IT	[Ttmpc0311] MINI PC					
desk3		Non-IT	[FURN_0097] Customizable Desk					
desk2		Non-IT	[FURN_0097] Customizable Desk					
desk1		Non-IT	[FURN_0097] Customizable Desk					
Acoustic Bloc Screens2		IT	[FURN_6666] Acoustic Bloc Screens					
Acoustic Bloc Screens1		IT	[FURN_6666] Acoustic Bloc Screens					

Figure 3-29 Issue Items (3)

Take reference from the Fig 3-81 shown above.

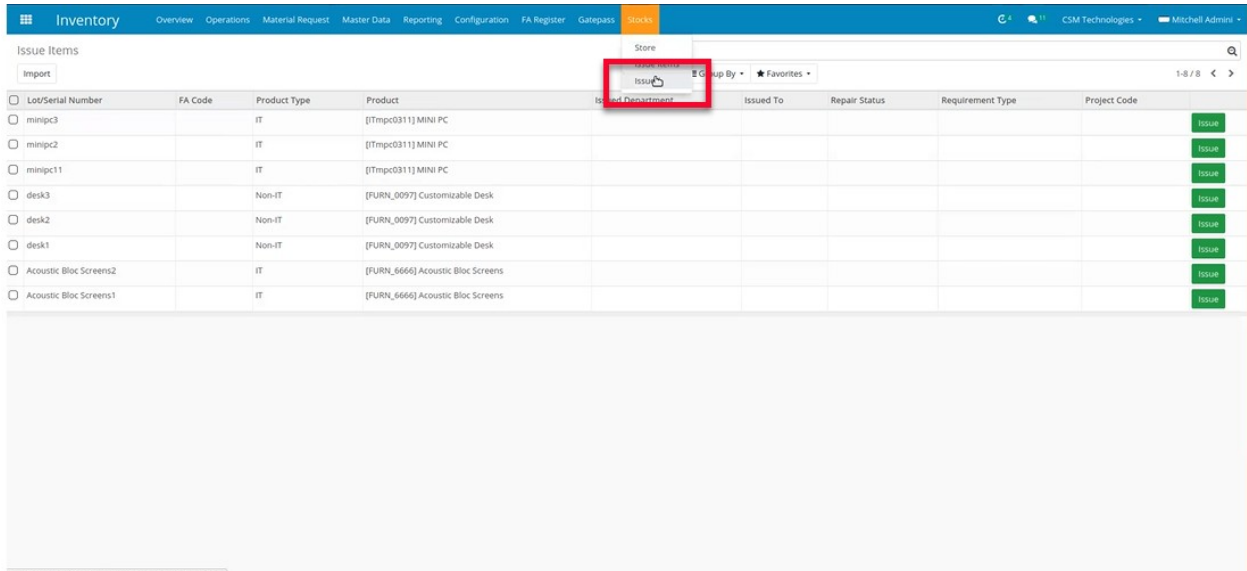
- Select the requirement type.
- Select the Department Name.

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- Select the Name of the Person to whom the Item to be issued.
- Add remarks in the textbox.
- Click on the **Issue** button.

3.1.1.4.3 ISSUED ITEMS

View the list of items issued in the Issued Items link.




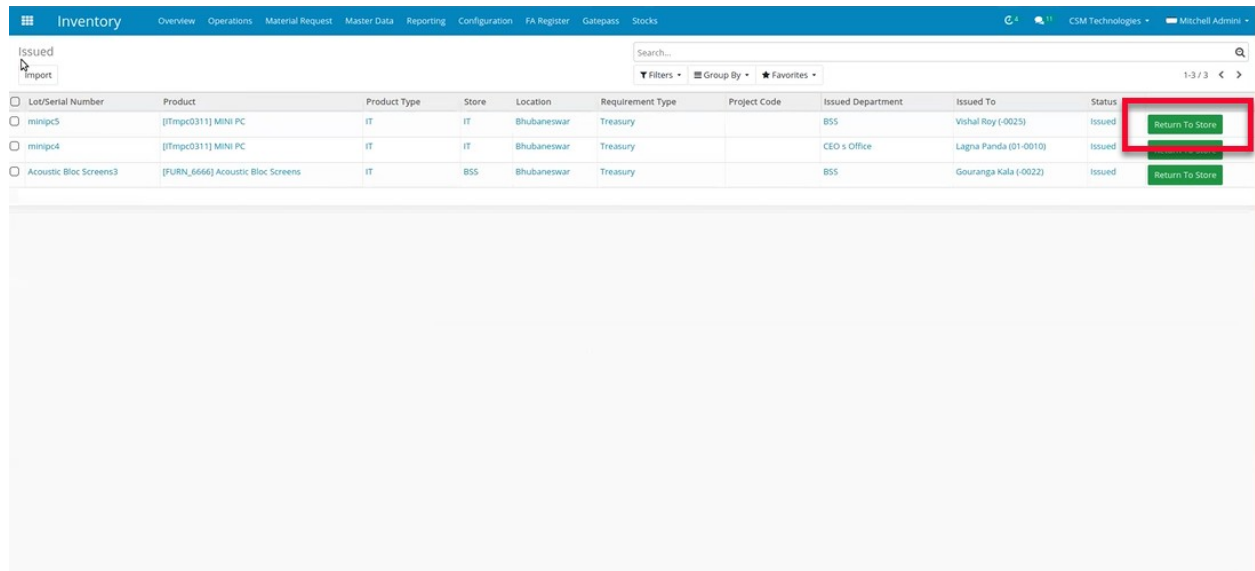
Lot/Serial Number	FA Code	Product Type	Product	Issued To	Repair Status	Requirement Type	Project Code	Issue
minipc3		IT	[Ttmpc0311] MINI PC					Issue
minipc2		IT	[Ttmpc0311] MINI PC					Issue
minipc1		IT	[Ttmpc0311] MINI PC					Issue
desk3		Non-IT	[FURN_0097] Customizable Desk					Issue
desk2		Non-IT	[FURN_0097] Customizable Desk					Issue
desk1		Non-IT	[FURN_0097] Customizable Desk					Issue
Acoustic Bloc Screens2		IT	[FURN_6666] Acoustic Bloc Screens					Issue
Acoustic Bloc Screens1		IT	[FURN_6666] Acoustic Bloc Screens					Issue

Figure 3-30 Issued Items (1)

Refer to the link shown in the Figure 3-82 above.

On clicking the list of the items issued are displayed in the table format.

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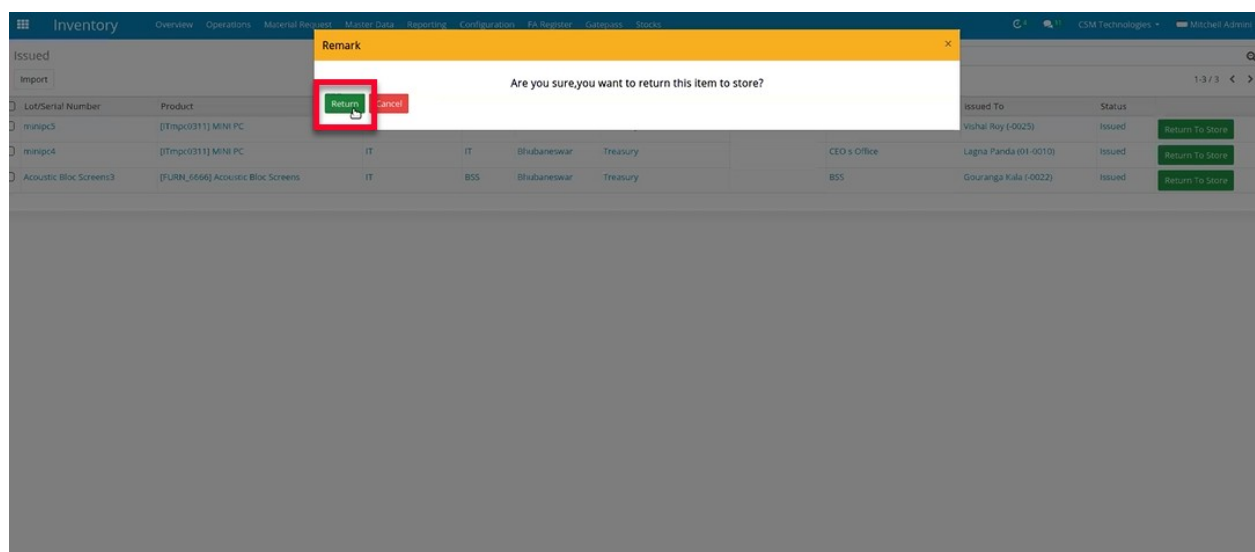


Lot/Serial Number	Product	Product Type	Store	Location	Requirement Type	Project Code	Issued Department	Issued To	Status	Action
minipc5	[ITmpc0311] MINI PC	IT	IT	Bhubaneswar	Treasury		BSS	Vishal Roy (-0023)	Issued	Return To Store
minipc4	[ITmpc0311] MINI PC	IT	IT	Bhubaneswar	Treasury		CEO's Office	Lagna Panda (01-0010)	Issued	Return To Store
Acoustic Bloc Screens3	[FURN_6666] Acoustic Bloc Screens	IT	BSS	Bhubaneswar	Treasury		BSS	Gouranga Kala (-0022)	Issued	Return To Store

Figure 3-31 Issued Items (2)

If the issued item is returned back to the stock, then the Store Officer needs to update the status and items details in the system.


- Click on **Return to Store** link. On clicking, a remarks textbox appears on the display screen.



Lot/Serial Number	Product	Product Type	Store	Location	Requirement Type	Project Code	Issued Department	Issued To	Status	Action
minipc3	[ITmpc0311] MINI PC	IT	IT	Bhubaneswar	Treasury		CEO's Office	Vishal Roy (-0023)	Issued	Return To Store
minipc4	[ITmpc0311] MINI PC	IT	IT	Bhubaneswar	Treasury		CEO's Office	Lagna Panda (01-0010)	Issued	Return To Store
Acoustic Bloc Screens3	[FURN_6666] Acoustic Bloc Screens	IT	BSS	Bhubaneswar	Treasury		BSS	Gouranga Kala (-0022)	Issued	Return To Store

Figure 3-32 Issued Items - Confirmation Alert Message

- Click on the **Return** button, if the user is sure to return the item back to the store.

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The item returned is stocked back in the store and available for issue.

3.1.1.5 FA REGISTER

The Items that is issued to any user needs to be registered in the **FA Register** or Fixed Asset Register.

3.1.1.5.1 CREATE FA

Create FA for the item issued in the **Create FA** link.

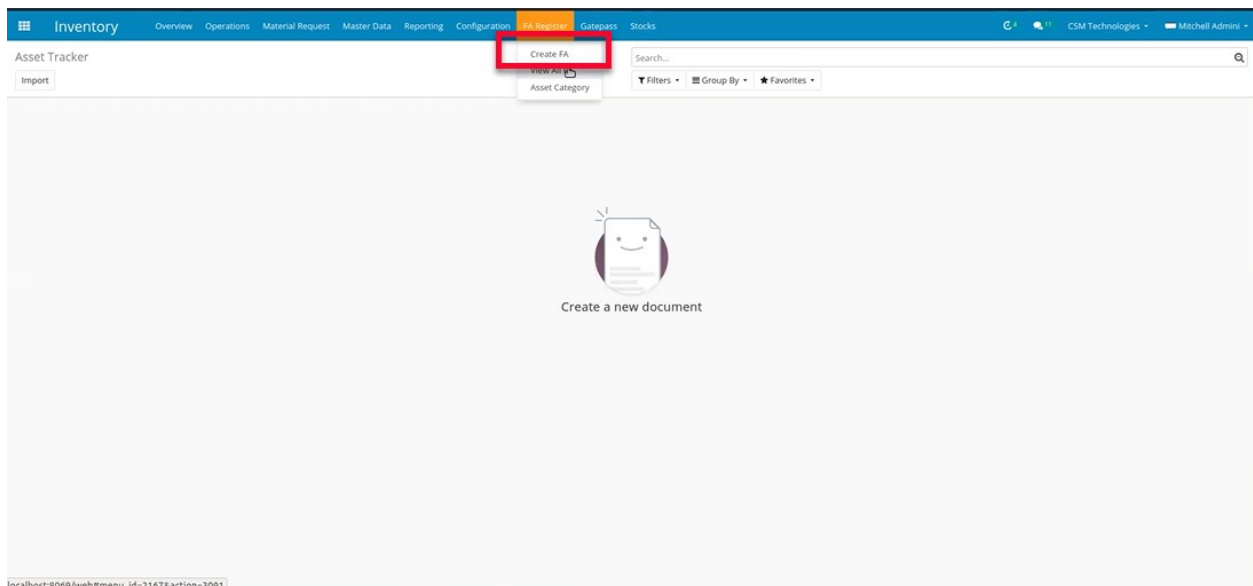



Figure 3-33 Create FA (1)

Refer to the link highlighted in the above figure 3-85.

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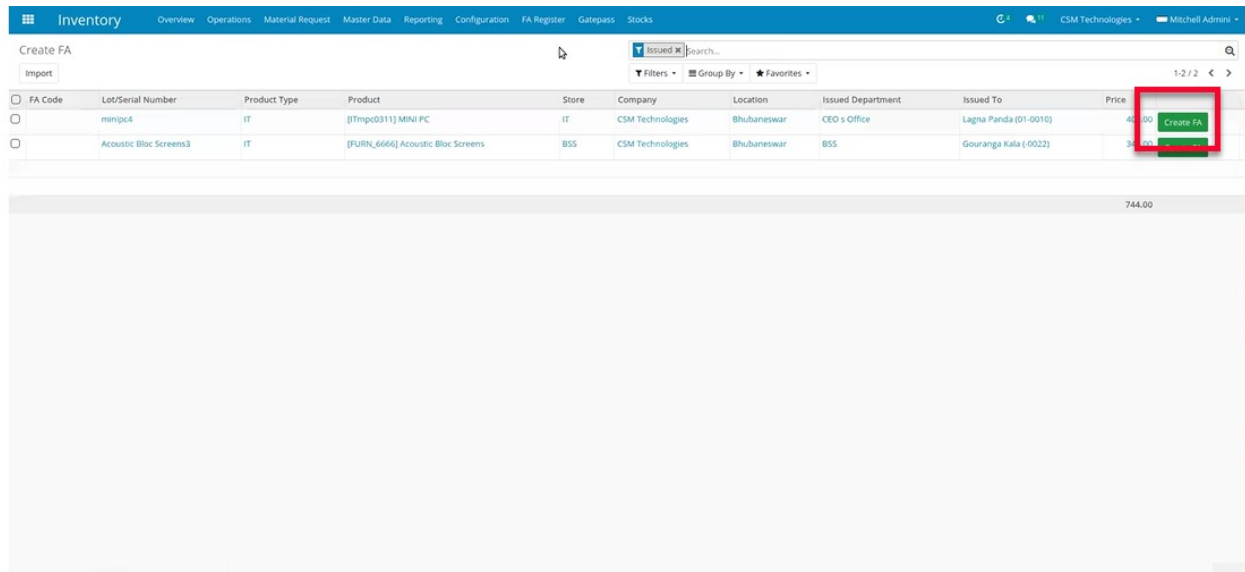

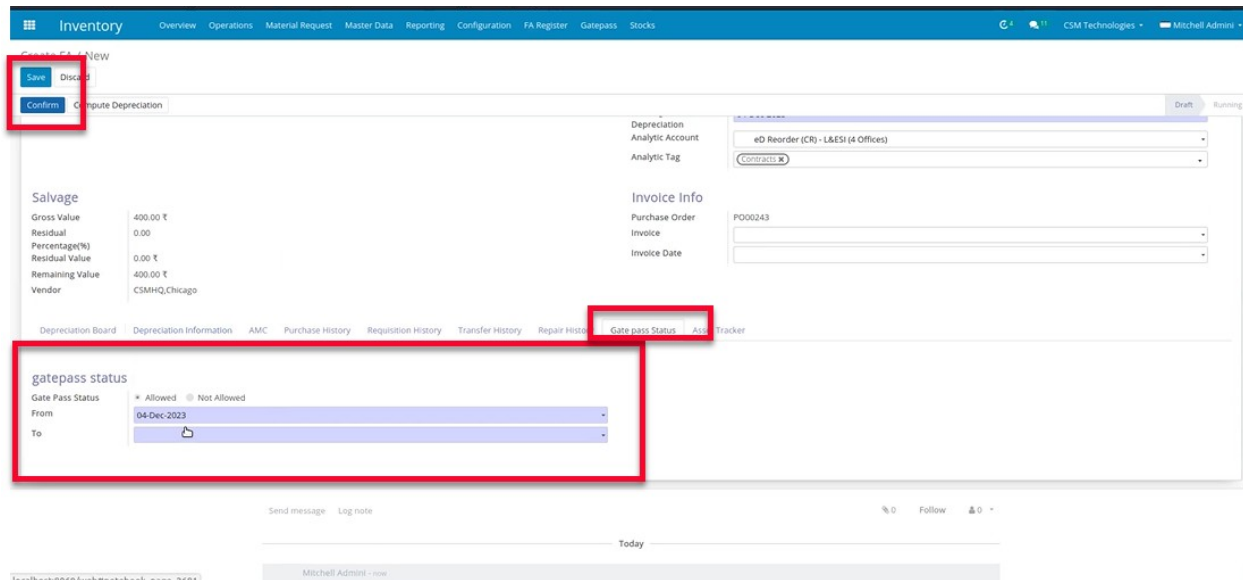


Figure 3-34 Create FA (2)

- Click on the **Create FA** link.

On clicking get navigated to the respective page.

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Inventory Overview Operations Material Request Master Data Reporting Configuration FA Register Gatepass Stocks

Create FA / CSM/Bhubaneswar/MNPC/0001

Save Discard Confirm

Depreciation Board Depreciation Information AMC Purchase History Requisition History Transfer History Repair History Gate pass Status Asset Tracker

gatepass status

Gate Pass Status Allowed Not Allowed

From 04-Dec-2023

To 06-Jan-2024

Send message Log note

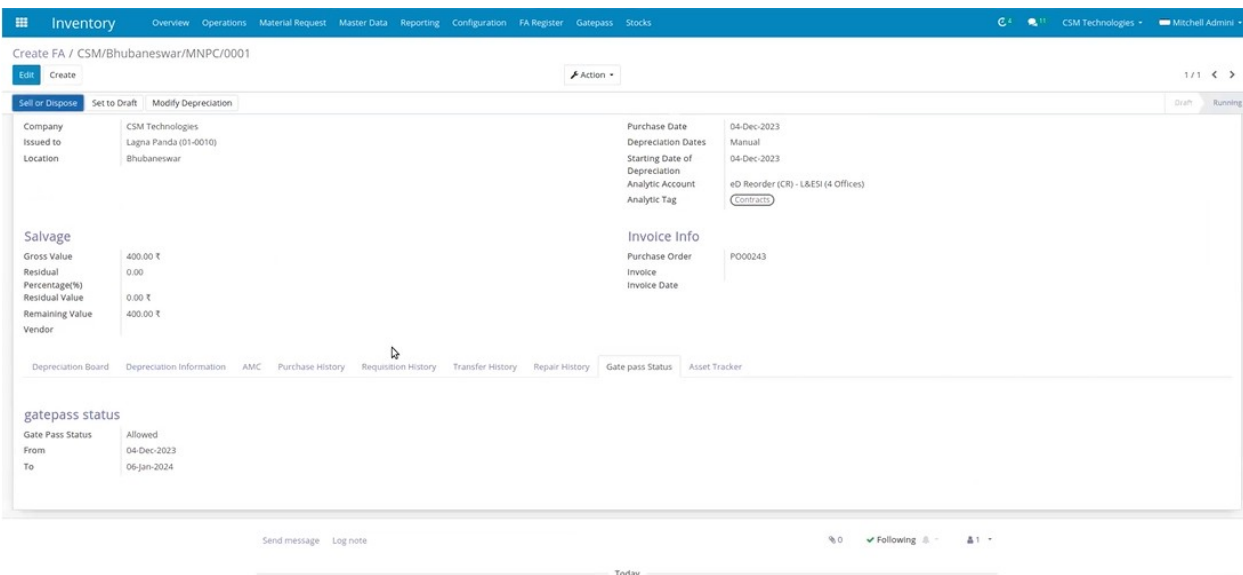
Today

Inrath001-BN668AashuBhndh0001 name: 76811

Mitchell Admin - now

Figure 3-36 Create FA (4)

- Select the Status as “Allowed”.
- Select the From and To Dateline.
- Click on the **Save** button.
- Once saved successfully, click on the **Confirm** button.
- With the confirmation, the FA for the item is created successfully.



Inventory Overview Operations Material Request Master Data Reporting Configuration FA Register Gatepass Stocks

Create FA / CSM/Bhubaneswar/MNPC/0001

Edit Create

Set to Draft Modify Depreciation

Company CSM Technologies

Issued to Lagna Panda (01-0010)

Location Bhubaneswar

Purchase Date 04-Dec-2023

Depreciation Dates Manual

Starting Date of Depreciation 04-Dec-2023

Analytic Account eD Reorder (CR) - L&ESI (4 Offices)

Analytic Tag Contracts

Invoice Info

Purchase Order PO00243

Invoice Invoice Date

Salvage

Gross Value 400.00 ₹

Residual 0.00

Percentage(%) 0.00 %

Residual Value 0.00 ₹

Remaining Value 400.00 ₹

Vendor CSMHQ,Chicago

Depreciation Board Depreciation Information AMC Purchase History Requisition History Transfer History Repair History Gate pass Status Asset Tracker

gatepass status

Gate Pass Status Allowed

From 04-Dec-2023

To 06-Jan-2024


Send message Log note

Today

Following 1

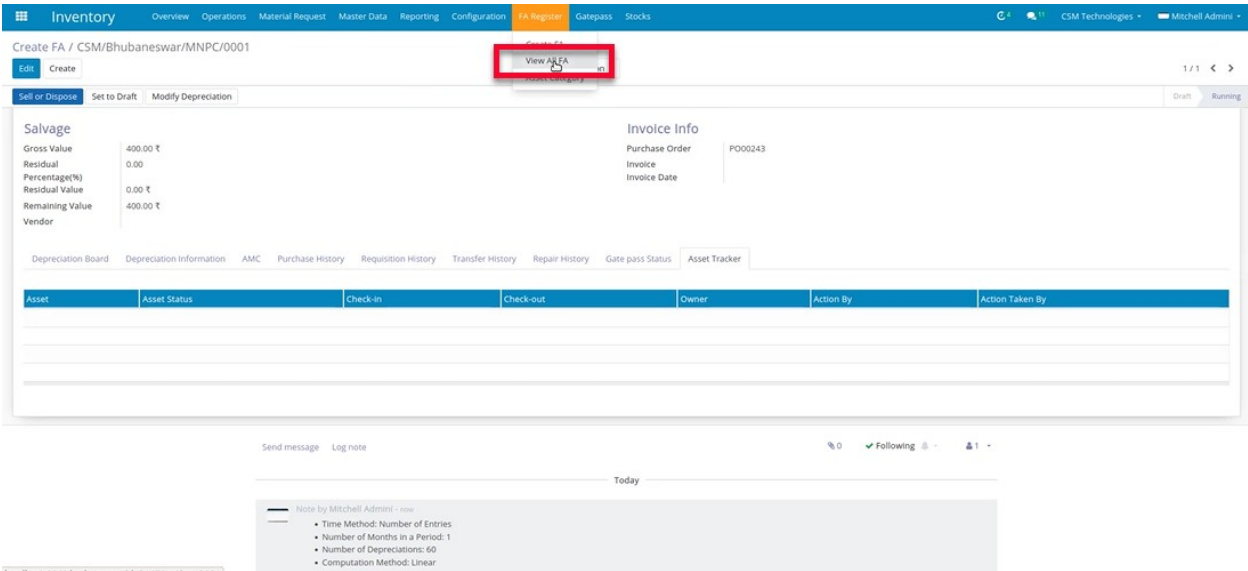
Figure 3-37 Create FA (5)

Take reference from the screen shared above.

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3.1.1.5.2 VIEW ALL FA

To view the list of all the FA created, click on the **View All FA** link.

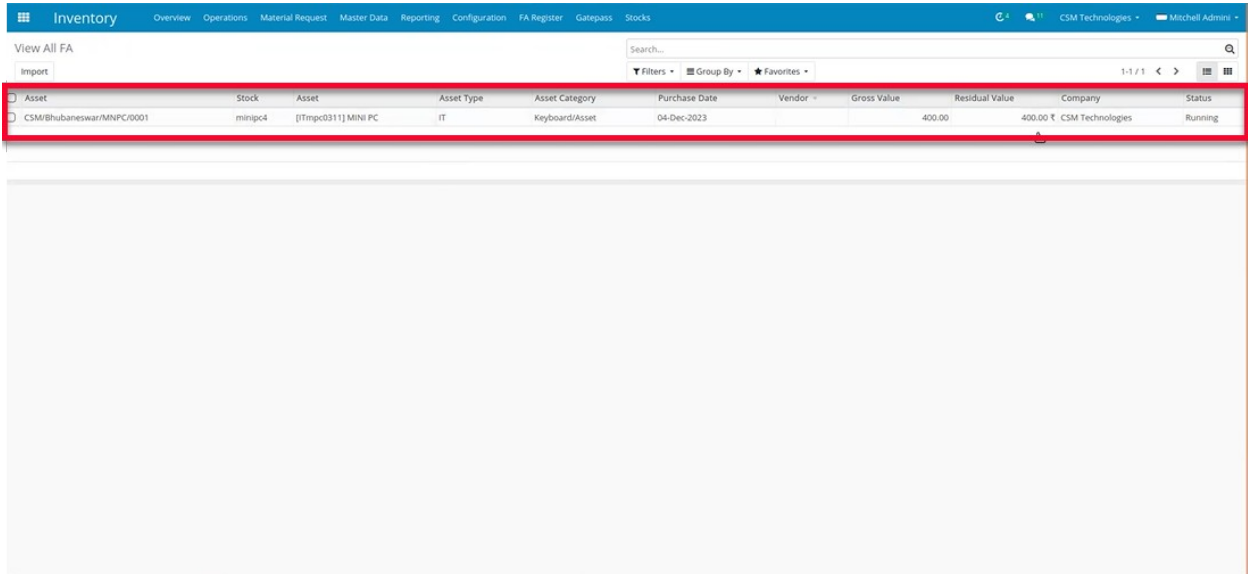


The screenshot shows the 'Inventory' section of the CSM system. The 'View All FA' link is highlighted with a red box. Below the link, there is a table showing asset details including Salvage, Invoice Info, and a list of assets.

Asset	Asset Status	Check-in	Check-out	Owner	Action By	Action Taken By
CSM/Bhubaneswar/MNPC/0001	minipc4	[Ttmpc0311] MINI PC	IT	Keyboard/Asset	04-Dec-2023	

Figure 3-38 View All FA (1)


On clicking, the list of the FA created is displayed.
Refer to the screen shared below.



The screenshot shows the 'View All FA' list in the CSM system. The list displays a table of assets with the following columns: Asset, Stock, Asset Type, Asset Category, Purchase Date, Vendor, Gross Value, Residual Value, Company, and Status.

Asset	Stock	Asset Type	Asset Category	Purchase Date	Vendor	Gross Value	Residual Value	Company	Status
CSM/Bhubaneswar/MNPC/0001	minipc4	[Ttmpc0311] MINI PC	IT	04-Dec-2023		400.00	400.00	CSM Technologies	Running

Figure 3-39 View All FA (2)

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The list shown above features the Asset Name, Stock Name, Asset Name, Asset Type, Asset Category, Purchase Date, Vendor Name, etc.