Material Management

PR Team

USER MANUAL

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**)
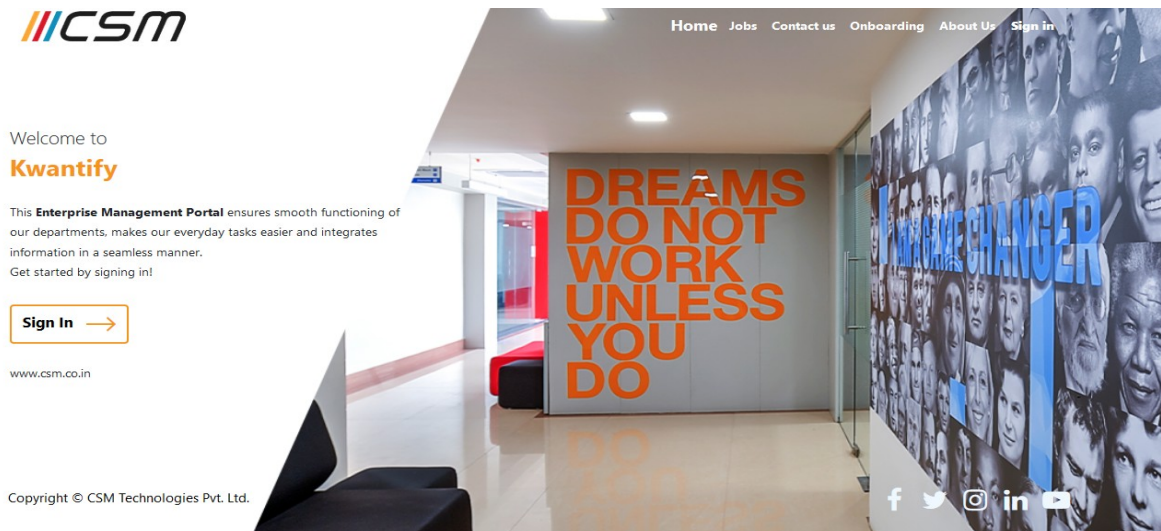
Figure 2-1 Welcome Screen

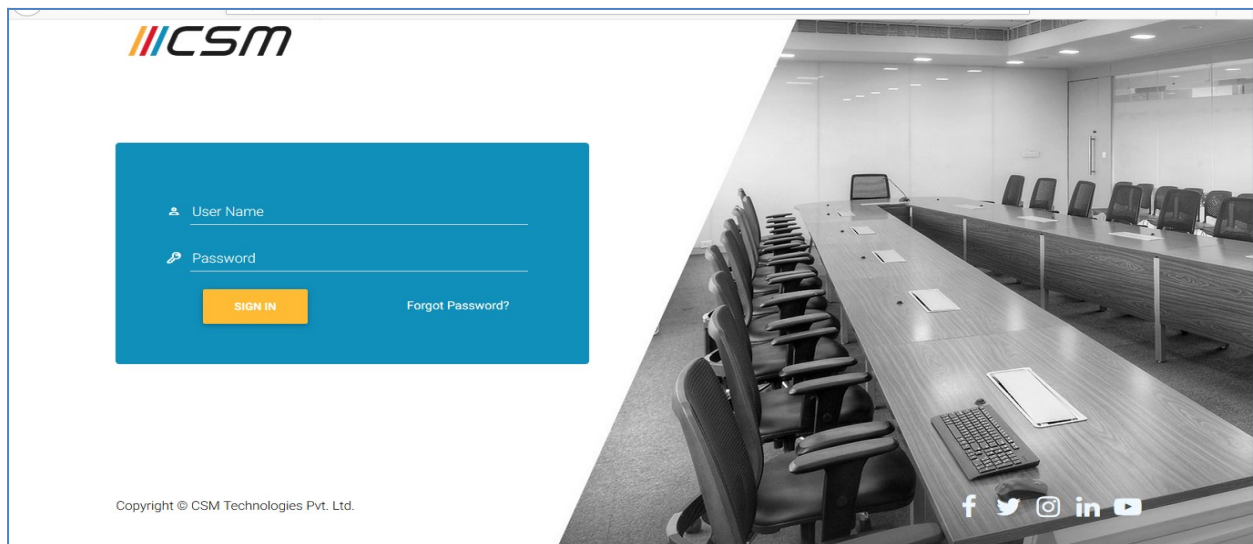Refer to Fig 2-1, i.e. click on the **Sign In** button and navigate to the login screen.

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.

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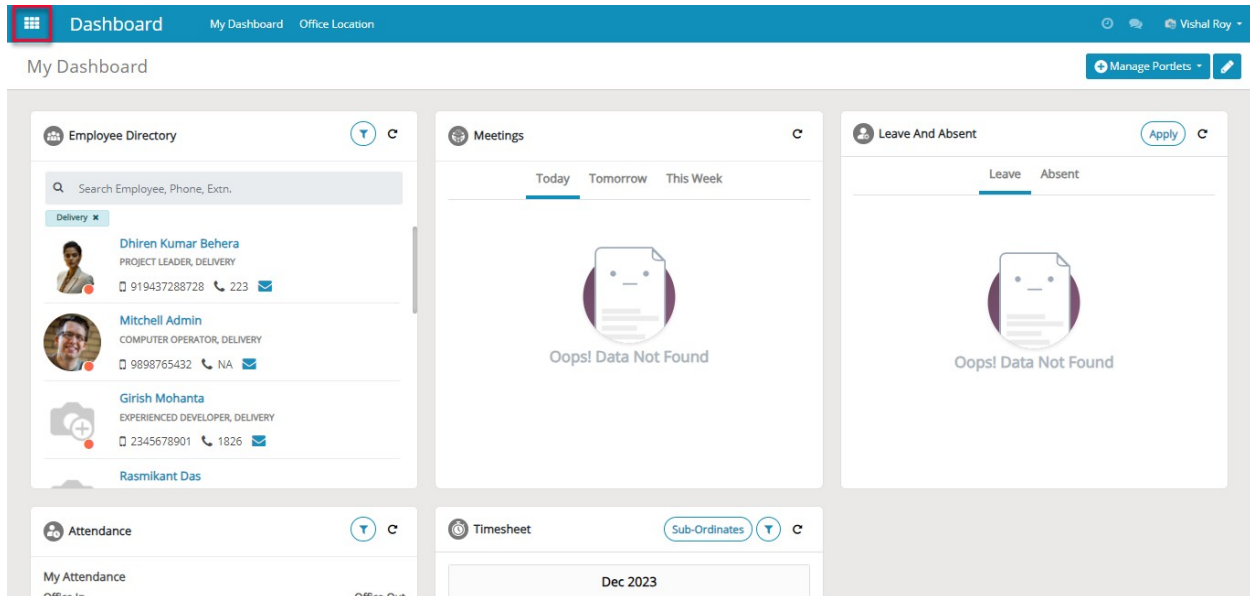

Figure 2-3 My Dashboard

- 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.
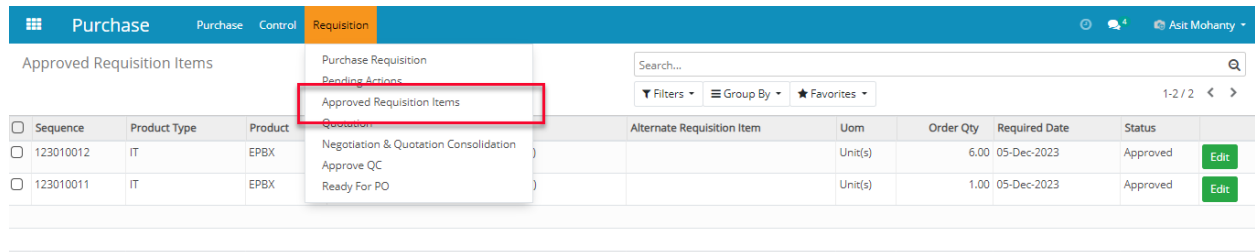
3.1.1.1 APPROVED REQUISITION – PR TEAM

The Approved Requisition Request is pending at the PR Team for creation of the Quotation, Invite Vendors for negotiation, the approval of the QC and Preparation of the Purchase Order.

For doing all these activities, the PR Team user needs to login into the application and navigate to the path mentioned here - **Login>>Dashboard>>Menu>>Purchase>>Requisition>>Approved Requisition Items**

Refer to the Fig shown below.
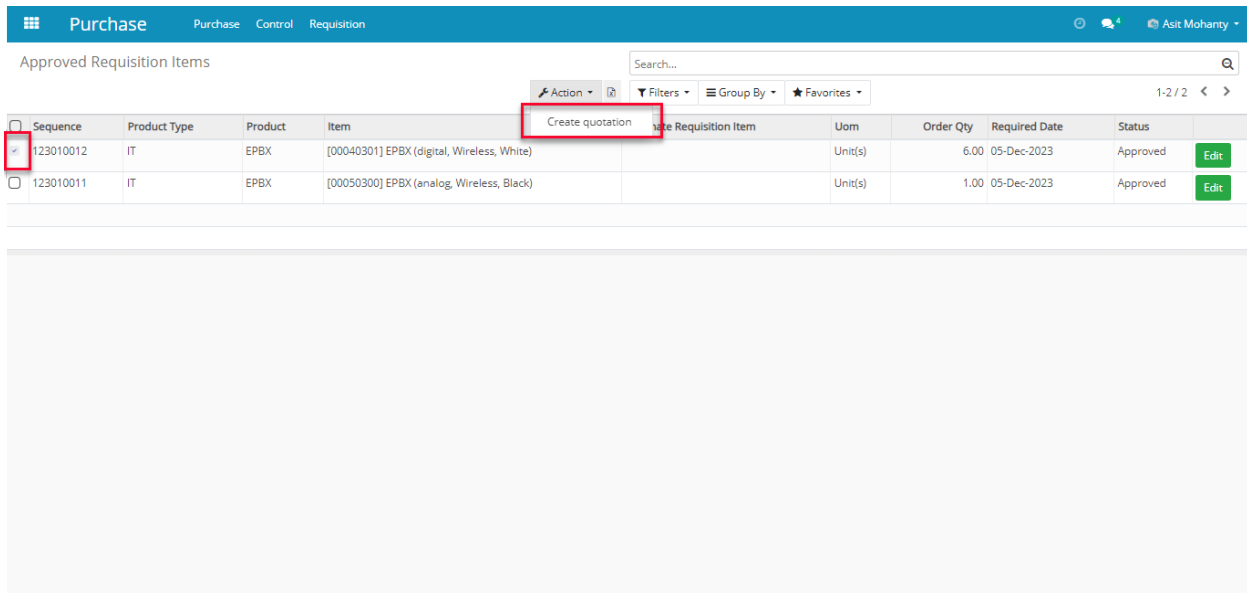
Figure 3-4 Approved Requisition Items

With reference to the Fig, 3-31 view the list of the requisition request pending for action at the user in this section.

- To update any changes to the requisition request, click on the **Edit** button provided for respective record.
- Now, in order to prepare the quotation for purchase of the Item from the Vendors, select the checkbox provided in-front of the respective **Approved Requisition Request**.

Figure 3-5 Approved Requisition Items - Create Quotation (1)

On clicking, the action button appears.

- Click and view the drop-down menu under the **Action** button.
- Select the record by putting a tick mark in the checkbox.
- Click on the **Create Quotation** button.

On clicking a confirmation alert window appears on the display screen.
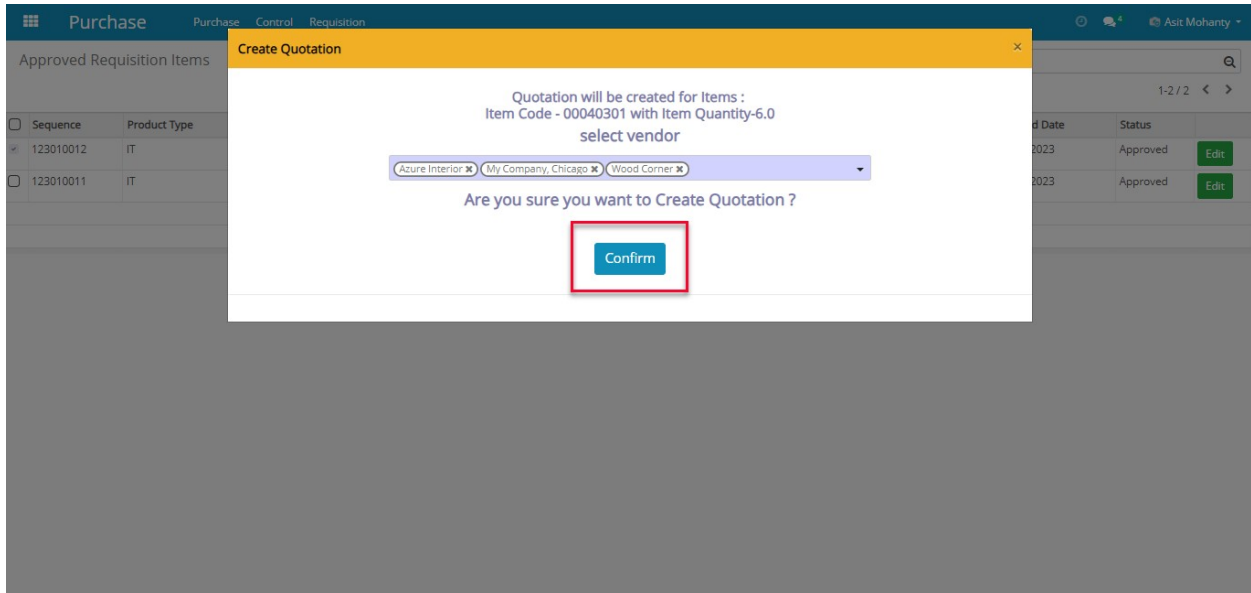
Figure 3-6 Approved Requisition Items - Create Quotation (2)

- Select the Names of the Vendors from the drop-down list to whom the quotation is to be sent.
- Click on **Confirm** button.

3.1.1.2 QUOTATION

The list of the Quotation created by the PR Team for the Vendors are pending at the user end for update, once the response from the Vendors are received. Refer to the Fig 3-34.

Figure 3-7 Quotation

Refer to the link highlighted in the Figure 3-34 shown above.

- To view the details of the request, click on the respective record displayed and get navigated to the respective section.

Figure 3-8 Quotation/Take Action (1)

- Click on the **Edit** button provided to update any changes to the quotation details.

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Figure 3-9 Quotation/Take Action (2)

- Update the product information.
- Update the Unit Price.
- Update the Percentage of Tax applicable.
- On updating the price information, the Total Tax Applicable in Amount, Sub-Total and Total Amount auto populates.
- On updating all the price information, click on the **Move to Response Received** button.

Figure 3-10 Quotation/Take Action (3)

- Click on the **Save** button.
- On successfully saving the quotation details, the response received.

Once the response is received from the interested vendor (s), the authorized user needs to start the negotiation process with the vendor directly. If there is similar response from different vendors, then the user can consolidate the received quotation as one.
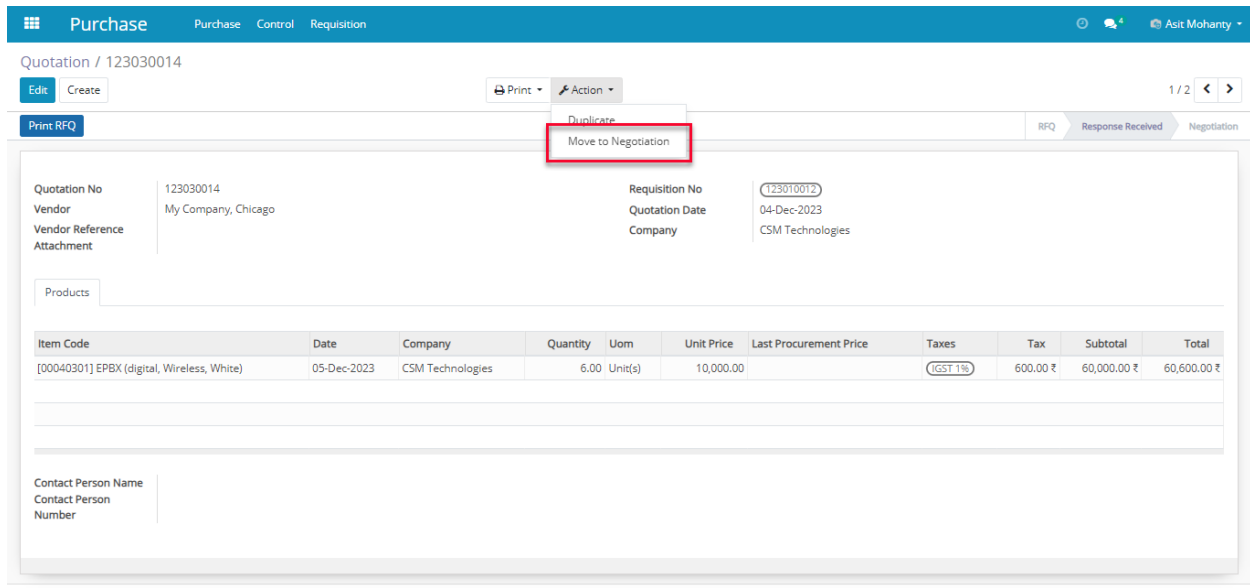
Figure 3-11 Move to Negotiation (1)

- Click on **Move to Negotiation** button under the Action drop-down menu.
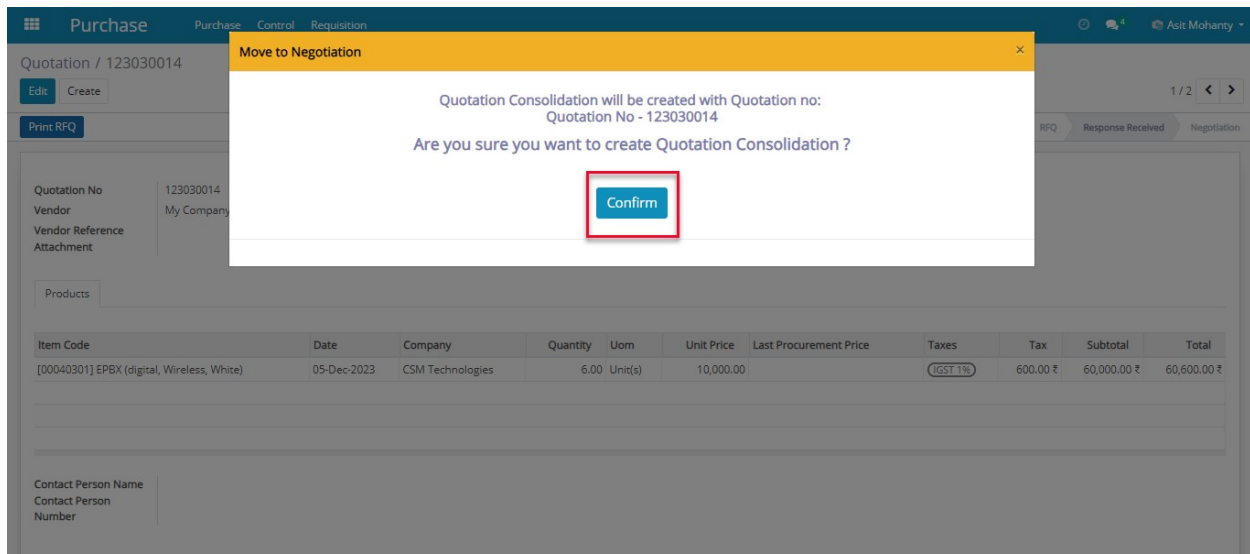- On clicking, a confirmation window will pop-up on the display screen.

Figure 3-12 Move to Negotiation (2)

Take reference from Fig 3-39, a system generated message is displayed saying – *Are you sure you want to create quotation consolidation*?

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In order to create the consolidated quotation and confirm the negotiation process, click on the **Confirm** button.

3.1.1.3 NEGOTIATION & QUOTATION CONSOLIDATION

The Negotiation and Quotation Consolidation enables the authorized user to the view the list of the quotations where Quotation Consolidation or QC has been created, approved, and requisition request ready for Purchase Order creation.
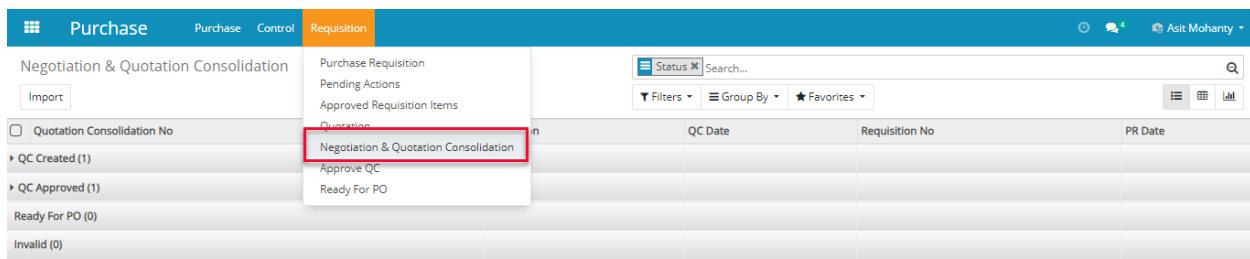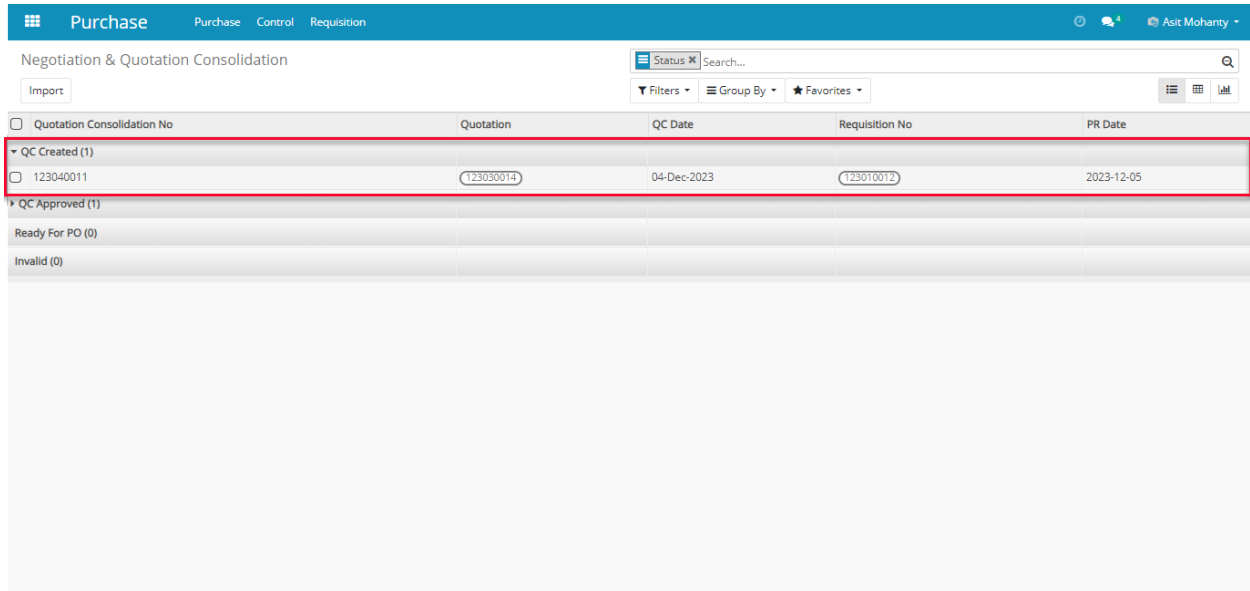

Figure 3-13 Negotiation & Quotation Consolidation (1)

Refer to Fig 3-40, i.e. Negotiation and Quotation Consolidation screen where the QC No., Quotation, QC creation date, PR No. and PR date are displayed for the new and approved QC as well as Ready for PO and Invalid requests.

To view in details of the QC, click on the arrow button on the left-hand side and expand the Quotation Consolidation category.

Figure 3-14 Negotiation & Quotation Consolidation (2)

Refer Fig 3-41, where the QC created are displayed with their QC number, Quotation No., QC date, PR No., and PR date.

The user has the facility to view the detailed information of the QC created by clicking the respective record from the list and the system will navigate the user to the following screen.

Figure 3-15 Negotiation & Quotation Consolidation (3)

In the Negotiation and Quotation Consolidation, updated the final price after the negotiation.

- Click on the **Edit** button.

Figure 3-16 Negotiation & Quotation Consolidation (4)

- Update the comparative statement after the negotiation.

- Tick the checkbox and confirm the final price.
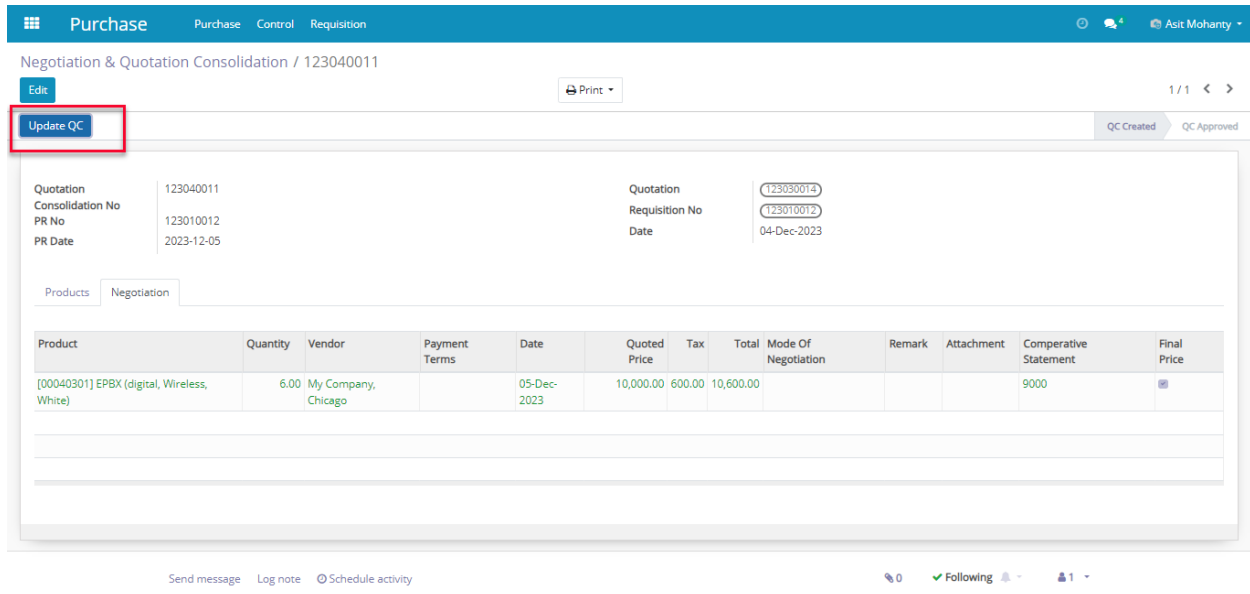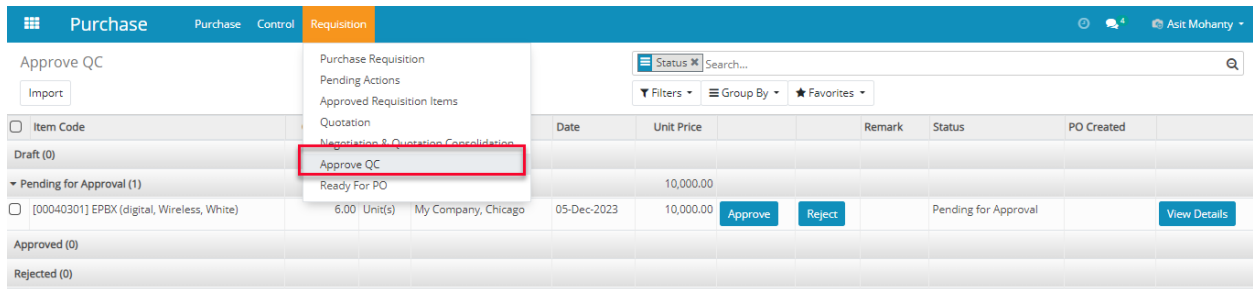- Click on the **Save** button.

Figure 3-17 Negotiation & Quotation Consolidation (5)

- Click on **Update QC** button.
- On clicking, the QC is created for the requisition request.

3.1.1.4 APPROVE QC

Once the Quotation Consolidation is created, it needs approval from authorized user. This section enables the approving authority to the view and approves the pending QC requests, as well as rejects the same, if the user finds the QC not standard enough for procurement process to go.

Figure 3-18 Approve QC (1)

Refer to the Fig 3-45, i.e. Approve QC screen where the Item Code, Item Name, Quantity, UoM, Vendor name, Date, Unit Price, remarks and current status are displayed for the pending, approved QC and Rejected QC.

To view in QC information in details, click on the arrow button right on the Quotation Consolidation type displayed in the Fig 3-45 to expand and view the details. Refer Fig 3-36.

There are two action buttons also – Approve & Reject.

- **Reject** - User has the facility to reject and cancel the QC request.
  - o Click on the **Reject** button followed by adding remarks for the action taken and the QC will move to the rejected section in the view section, Referring Fig 3-36.
- **Approve** – To approve the QC, click on the **Approve** button followed by adding remarks in the window pop-up on the screen. Refer to the screen shown below.
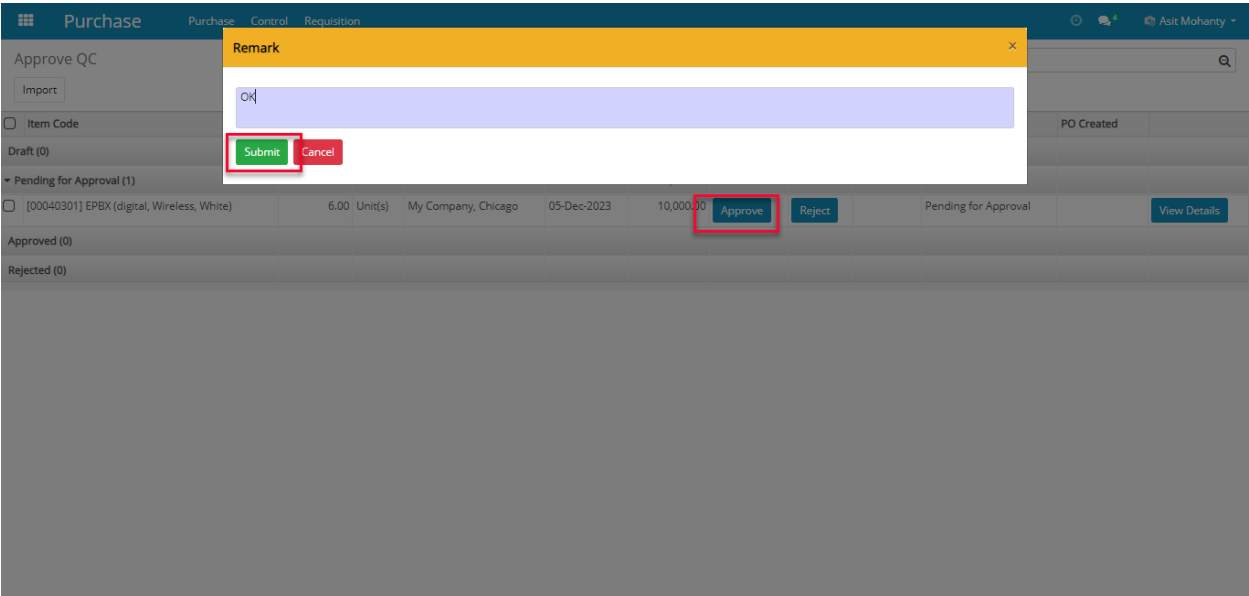
Figure 3-19 Approve QC (2)

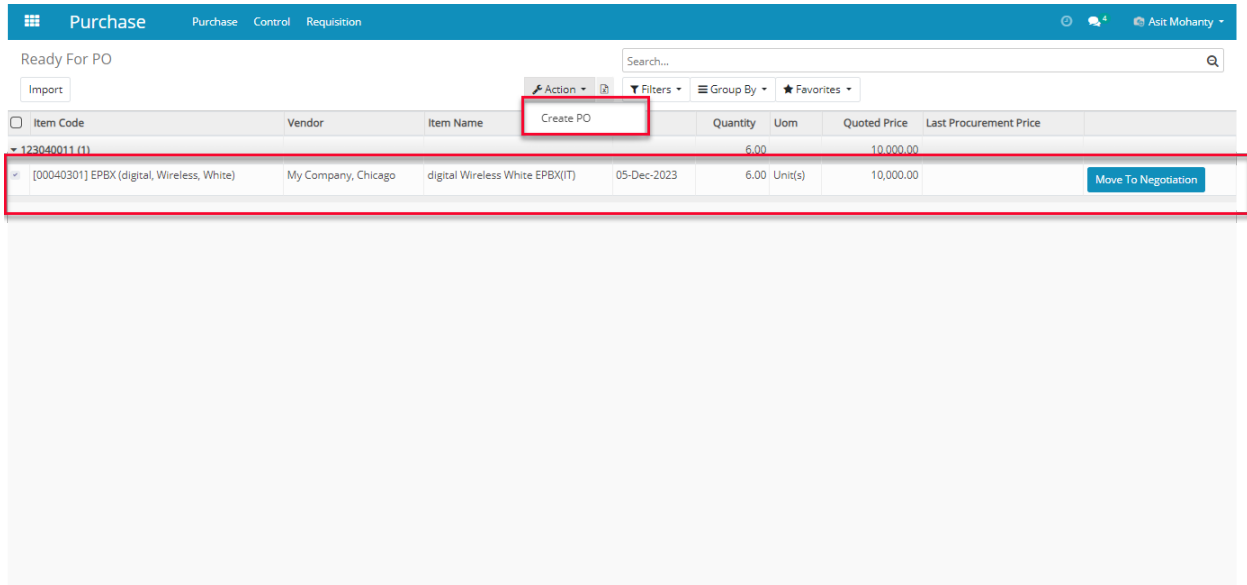Referring to Fig 3-46 shown above,

- Add remarks for the action taken and click on the **Submit** button.

On successful approval, the QC moves under the Approved section.

3.1.1.5 READY FOR PO

This section features the approved quotations for the procured items. The requisition items are all set for procurement. The authorized user can view the procurement item details in the Ready for PO section. Refer to the screen shared below.

Figure 3-20 Ready for PO (1)

Referring to Fig 3-47 shown above, the items ready for purchase are displayed with their item code, description of the item, vendor name, item name, date of procurement date, quantity required, UoM, quoted price and last procurement price if any.

To view in details, click on the arrow button left-hand side of the quotation number and the record data will be displayed. Refer to the screen shared below.

Figure 3-21 Ready for PO (2)

With reference to Fig 3-48, shown above, the details of the item code, vendor name, item name, date, quantity, UoM, quoted price and last procurement price are displayed.

- Select the record by putting tick mark in the checkbox.
- On selection, option to take action appears.
- Select the **Create PO** link. On clicking, a confirmation alert message populates on the display screen.

Figure 3-22 Ready for PO (3)

- Click on the **Confirm** button. On confirmation, the Purchase Order for the Vendor is created successfully.

3.1.1.6 PURCHASE ORDER

The purchase order created is pending for confirmation at the user end. To view the list of the pending purchase order, click and expand the **Purchase** menu link, and select the **Purchase Order** sub–menu link.
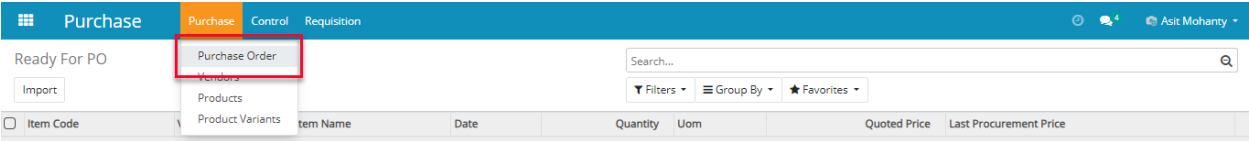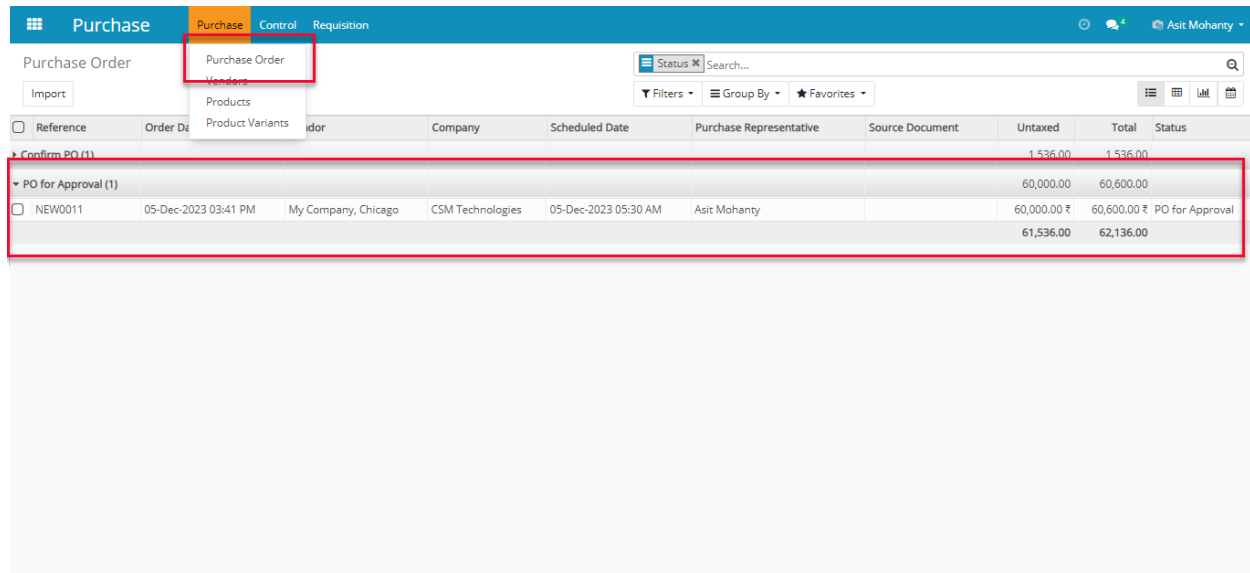

Figure 3-23 Purchase - Purchase Order(1)
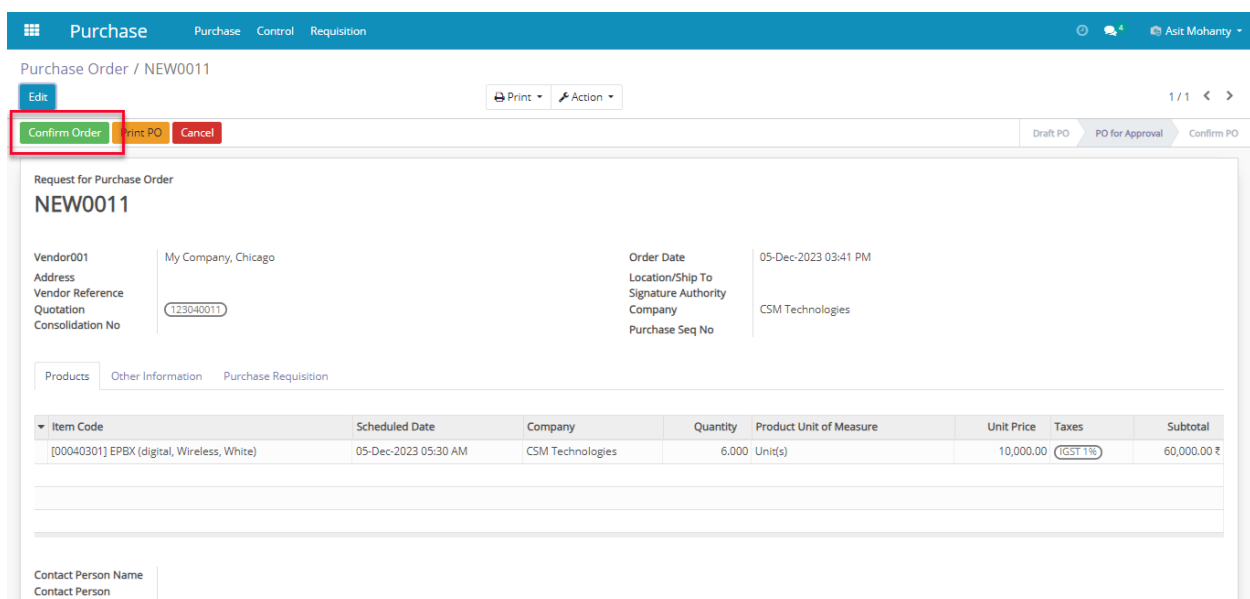
The list of the Confirmed PO and PO for Approval are displayed in a table.

Figure 3-24 Purchase - Purchase Order(2)

- View and expand the PO for Approval to view the pending list of Purchase Order.
- Click on the Purchase Order to view the details.
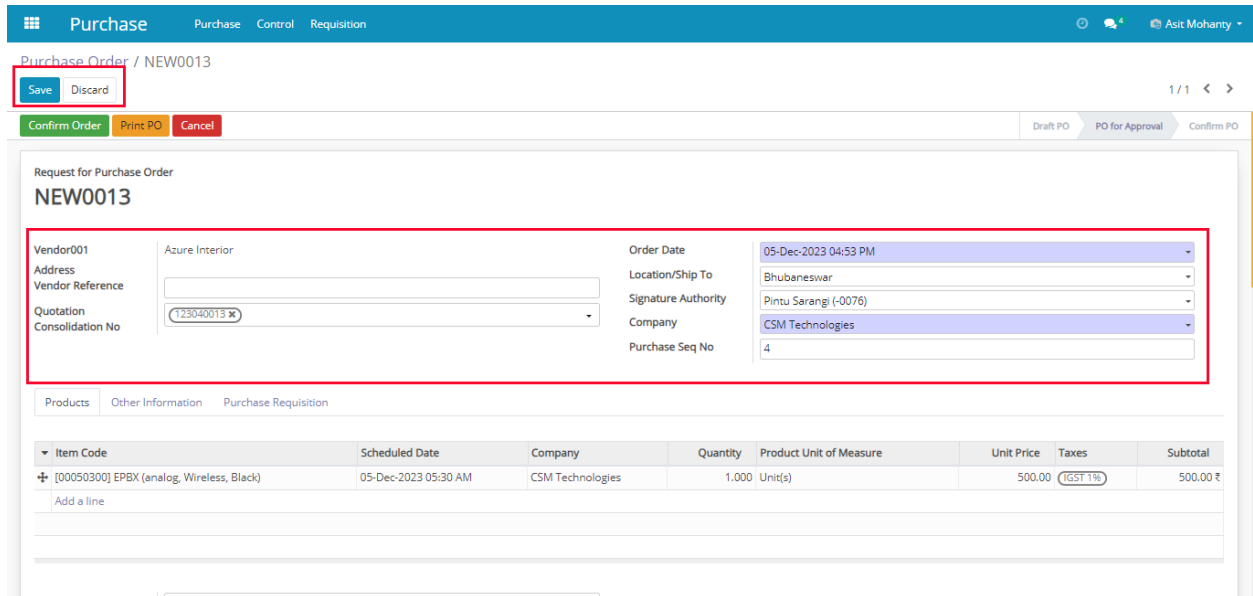
Figure 3-25 Purchase - Purchase Order(3)

- To update any changes in the purchase order details, click on the Edit button.

Figure 3-26 Purchase - Purchase Order(4)

- Update the Address of the Vendor to be used for reference.
- Select the Quotation Consolidation Number.
- Select the Location where the Order to be shipped.
- Select the Signature Authority.
- Select the Name of the Company to where the order is to be shipped.
- Enter the Purchase Sequence Number.
- Update the Product, Other Information and Purchase Requisition if required.
- Click on the **Save** button to save the changes done.

Figure 3-27 Purchase - Purchase Order (5)

- On saving all the details, click on the **Confirm Order** button and the system will navigate to the confirmed purchase orders screen.

Figure 3-28 Purchase - Purchase Order (6)

Refer to Fig 3-55 shown above, where the detailed information about the Confirmed PO is displayed.

Other Features

- **Edit** – To modify the details added, click on the edit button and get redirected to the edit screen where options to change and update the information will be provided.

- **Send PO by Email** – To send the PO details to vendor or authorized department users, Click on **Send PO by Email** Button.

- **Print** – Take a print-copy of the PO by clicking the **Print PO** button.

- **Cancel** – The **Cancel** button enables the user to cancel the PO confirmed.

- **Create Bill** – To create a vendor bill generated after receipt of product, click on the Create bill button and add the bill details in the Vendor Bill form.

- **Receive Products** – To update the PO details after the order is received from the vendor, the authorized user can click on **Receive Products** button and the system will navigate to the Good Received Note screen.