
	Quality System Template CSM Technologies	Document #: CSM/QT/01/01	Rev.: 1.0 Page #: 1 of 8
	Material Management		

Material Management **Department Head** **USER MANUAL**

	Quality System Template CSM Technologies	Document #: CSM/QT/01/01	Rev.: 1.0 Page #: 2 of 8
	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 8
	Material Management		

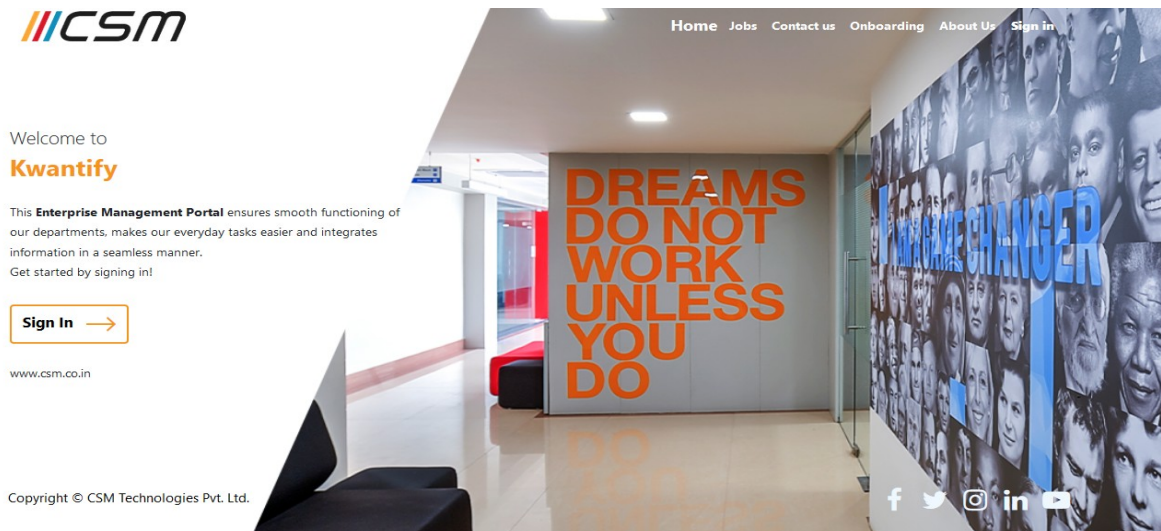


Figure 2-1 Welcome Screen

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

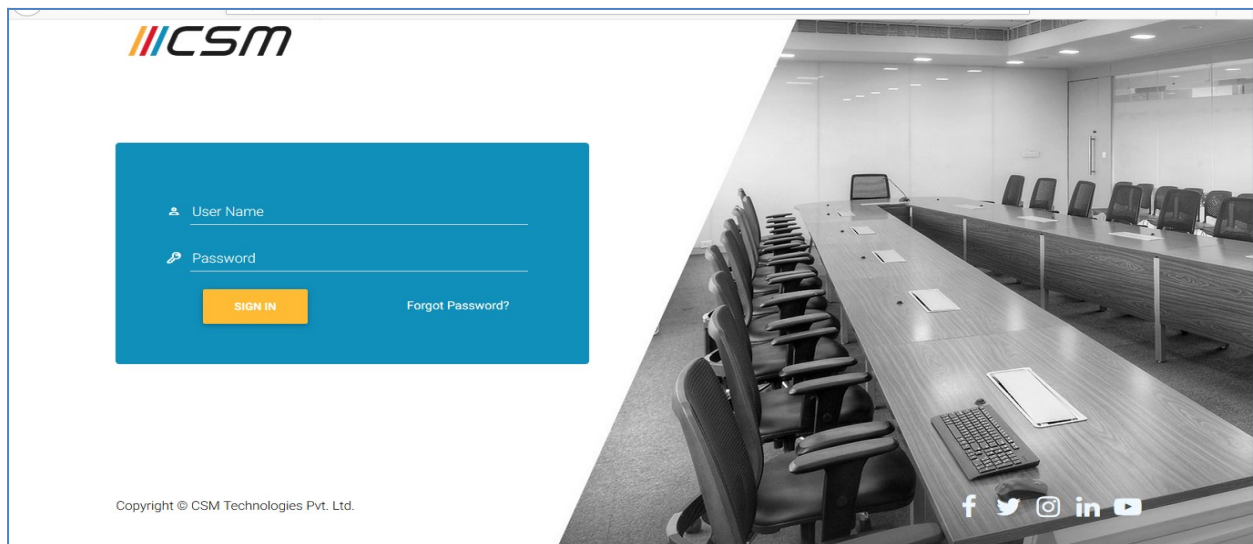



Figure 2-2 Login Screen

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 8
	Material Management		

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

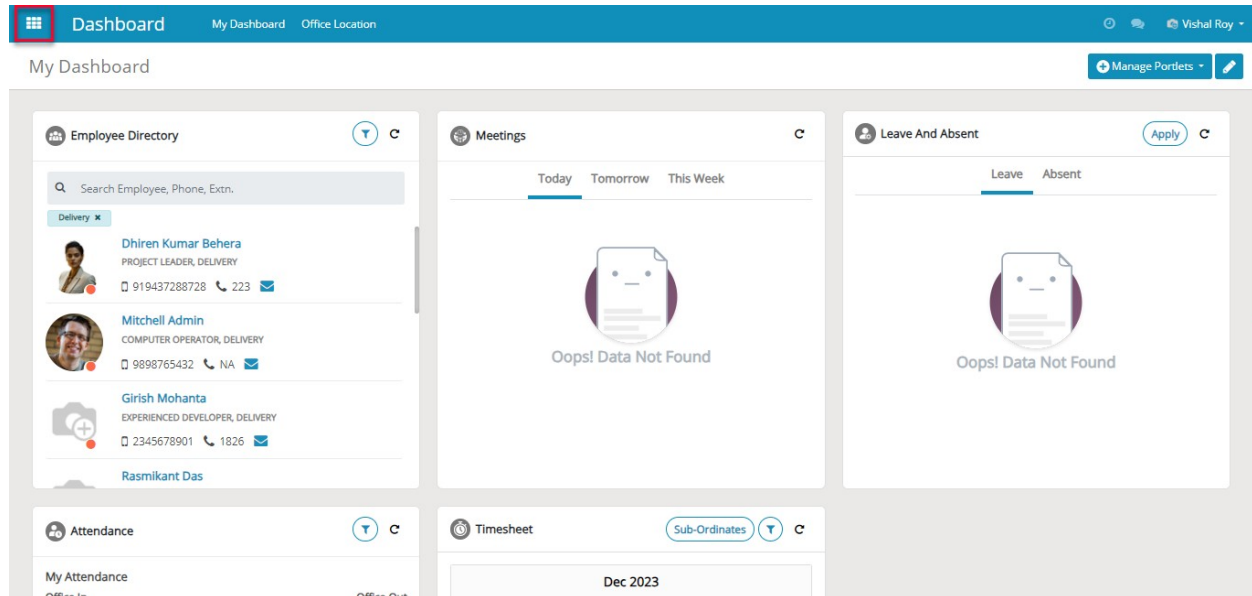



Figure 2-3 My Dashboard

- 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.

3.1.1.1 REQUISITION APPROVAL - DEPARTMENT HEAD LOGIN

Once the requisition is raised for the unavailable item, the respective Department Head of the store manager receives the request for approval.

	Quality System Template CSM Technologies	Document #: CSM/QT/01/01	Rev.: 1.0 Page #: 5 of 8
	Material Management		

The User needs to take action on the request received i.e, approve or reject the requisition, and then forward the request to the PR Team for further approval.

For doing so, the Department Head User needs to login into the portal and navigate to Path mentioned below -
Login>>Dashboard>>Menu>>Purchase

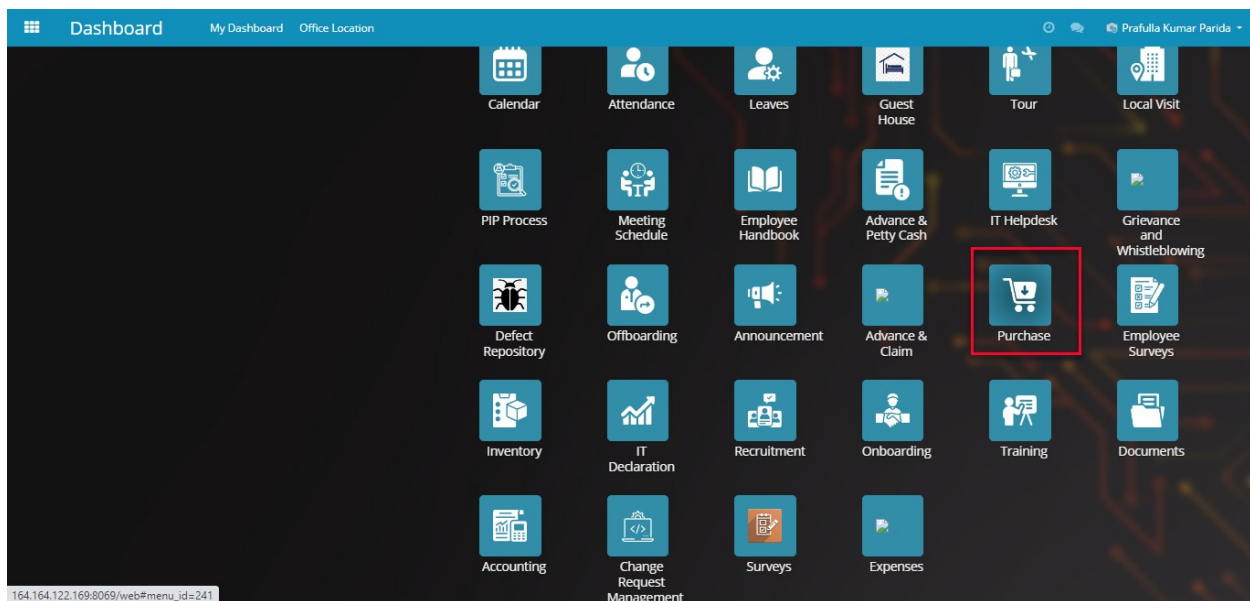



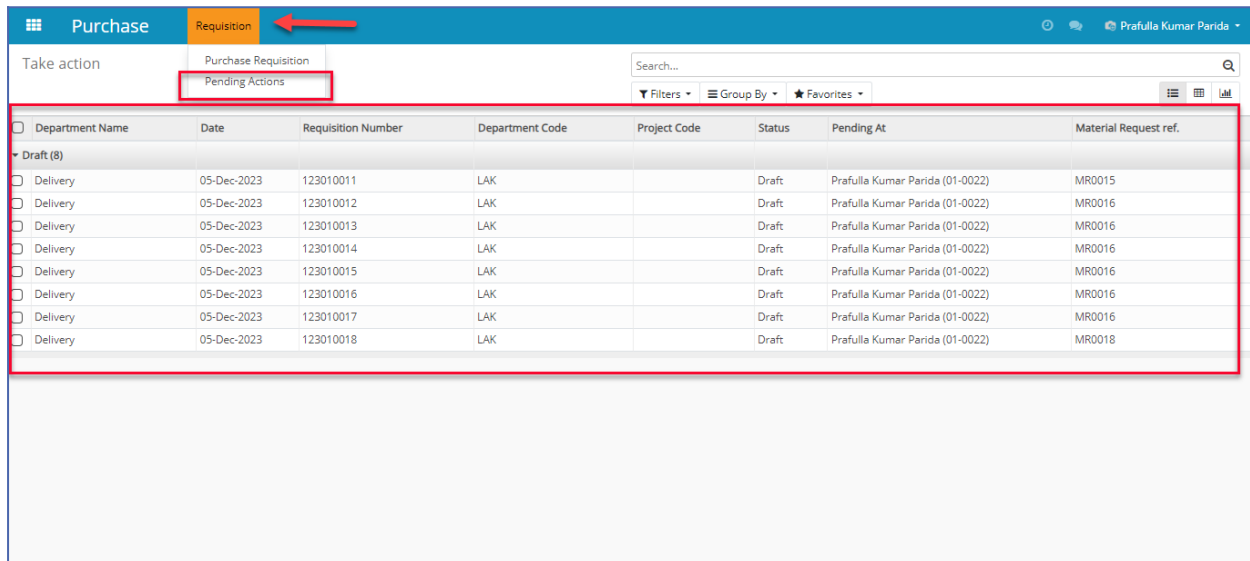
Figure 2-4 Menu Screen - Department Head User

From the list of the module name displayed in the menu screen, click on the **Purchase** module.

Go to - **Purchase>>Requisition>>Pending Actions**

- On clicking the **Pending Actions** link under the Requisition menu link, get navigated to the respective section.

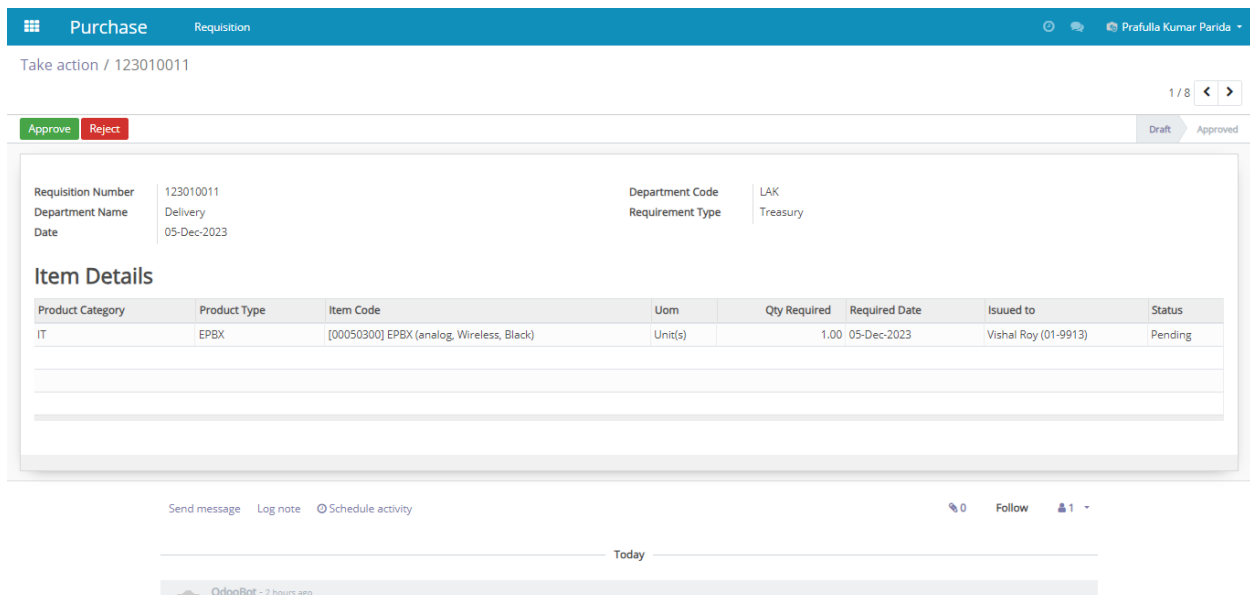
	Quality System Template CSM Technologies	Document #: CSM/QT/01/01	Rev.: 1.0 Page #: 6 of 8
	Material Management		



Department Name	Date	Requisition Number	Department Code	Project Code	Status	Pending At	Material Request ref.
▼ Draft (8)							
Delivery	05-Dec-2023	123010011	LAK		Draft	Prafulla Kumar Parida (01-0022)	MR0015
Delivery	05-Dec-2023	123010012	LAK		Draft	Prafulla Kumar Parida (01-0022)	MR0016
Delivery	05-Dec-2023	123010013	LAK		Draft	Prafulla Kumar Parida (01-0022)	MR0016
Delivery	05-Dec-2023	123010014	LAK		Draft	Prafulla Kumar Parida (01-0022)	MR0016
Delivery	05-Dec-2023	123010015	LAK		Draft	Prafulla Kumar Parida (01-0022)	MR0016
Delivery	05-Dec-2023	123010016	LAK		Draft	Prafulla Kumar Parida (01-0022)	MR0016
Delivery	05-Dec-2023	123010017	LAK		Draft	Prafulla Kumar Parida (01-0022)	MR0016
Delivery	05-Dec-2023	123010018	LAK		Draft	Prafulla Kumar Parida (01-0022)	MR0018

Figure 2-5 Requisition - Pending Actions - Department Head User


- Here, the list of the request received is displayed in a table.
- To view the details of the request, click on the respective requisition request.



Requisition Number	123010011	Department Code	LAK
Department Name	Delivery	Requirement Type	Treasury
Date	05-Dec-2023		

Product Category	Product Type	Item Code	Uom	Qty Required	Required Date	Issued to	Status
IT	EPBX	[00050300] EPBX (analog, Wireless, Black)	Unit(s)	1.00	05-Dec-2023	Vishal Roy (01-9913)	Pending

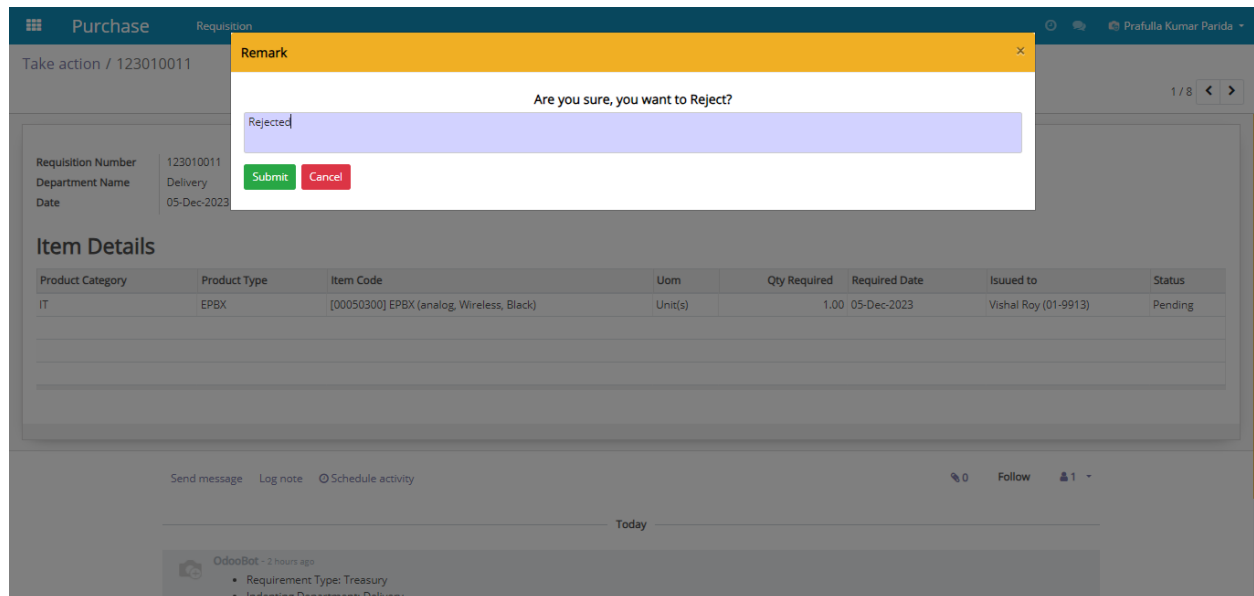
Figure 2-6 Requisition - Pending Actions/Take Action-Department Head User

	Quality System Template CSM Technologies	Document #: CSM/QT/01/01	Rev.: 1.0 Page #: 7 of 8
	Material Management		

Reject

- If the request is not valid, then click on the **Reject** button to cancel the request.

On clicking, a confirmation alert message populates on the display screen saying – *Are you sure, you want to Reject?*



The screenshot shows the Odoo 'Purchase Requisition' interface. A confirmation dialog box is displayed in the center with the title 'Remark' and the message 'Are you sure, you want to Reject?'. Below the message is a text input field containing the word 'Rejected'. At the bottom of the dialog are two buttons: 'Submit' (green) and 'Cancel' (red). In the background, the requisition details are visible, including the Requisition Number (123010011), Department Name (Delivery), Date (05-Dec-2023), and Item Details table.

Product Category	Product Type	Item Code	Uom	Qty Required	Required Date	Issued to	Status
IT	EPBX	[00050300] EPBX (analog, Wireless, Black)	Unit(s)	1.00	05-Dec-2023	Vishal Roy (01-9913)	Pending


Figure 2-7 Requisition - Pending Actions/Take Action-Department Head User (1)

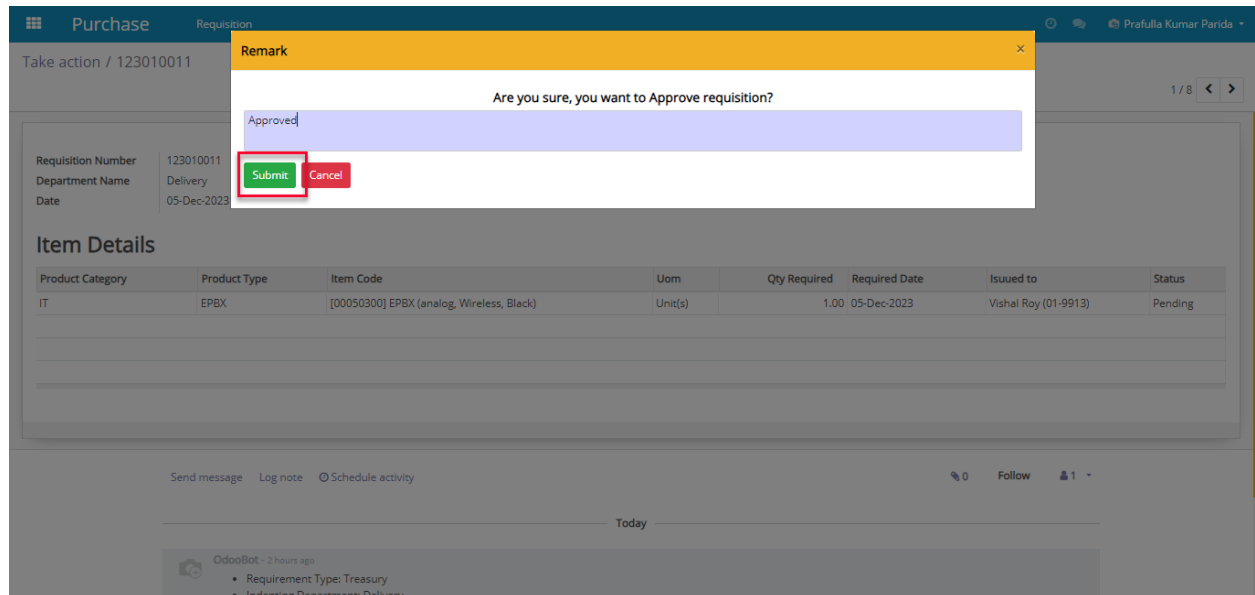
- Add remarks for the action to be taken.
- Click on the **Submit** button.
- On successful submission, the request is rejected.

Approve

- To approve the request, click on the Approve button.

On clicking, a confirmation alert message populates on the display screen saying – *Are you sure, you want to approve?*

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



The screenshot shows the Odoo Purchase Requisition interface. A confirmation dialog box is open, asking "Are you sure, you want to Approve requisition?". The dialog has a text input field with "Approved" entered, and two buttons: "Submit" (highlighted with a red box) and "Cancel".

Requisition Details:

- Requisition Number: 123010011
- Department Name: Delivery
- Date: 05-Dec-2023

Item Details:

Product Category	Product Type	Item Code	Uom	Qty Required	Required Date	Issued to	Status
IT	EPBX	[00050300] EPBX (analog, Wireless, Black)	Unit(s)	1.00	05-Dec-2023	Vishal Roy (01-9913)	Pending

Figure 2-8 Requisition - Pending Actions/Take Action-Department Head User (2)

- Add remarks for the action to be taken.
- Click on the **Submit** button.

On successful submission, the request is moved to the PR Team.