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	Material Management		

Material Management

Store Manager

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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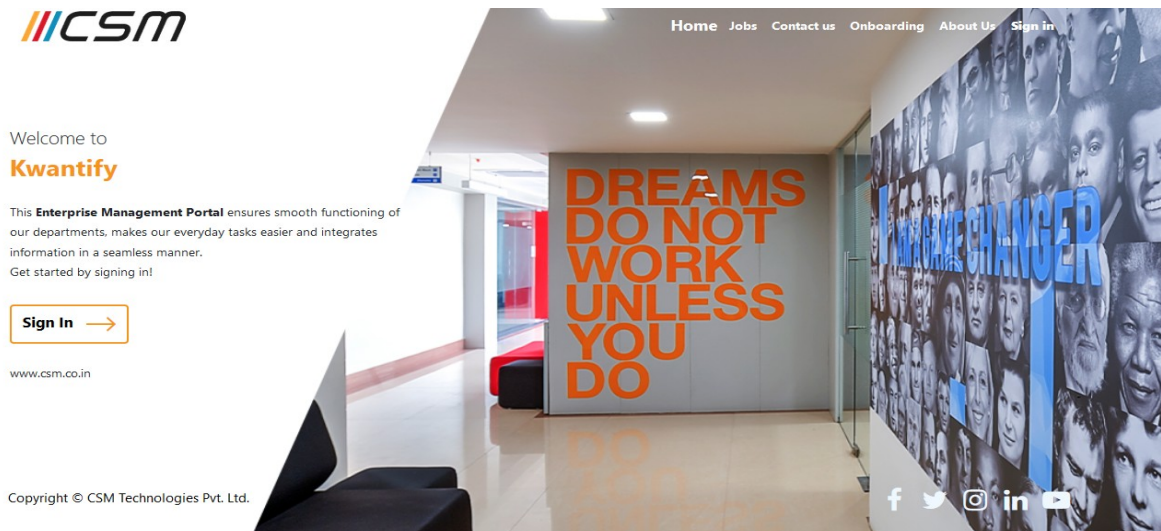


Figure 2-1 Welcome Screen

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

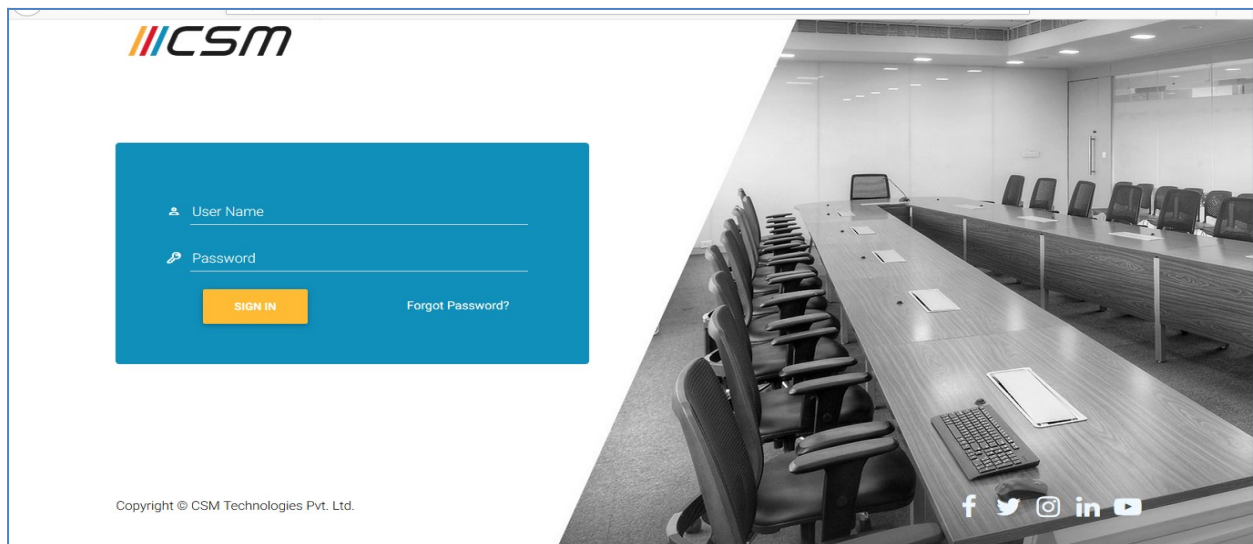



Figure 2-2 Login Screen

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.

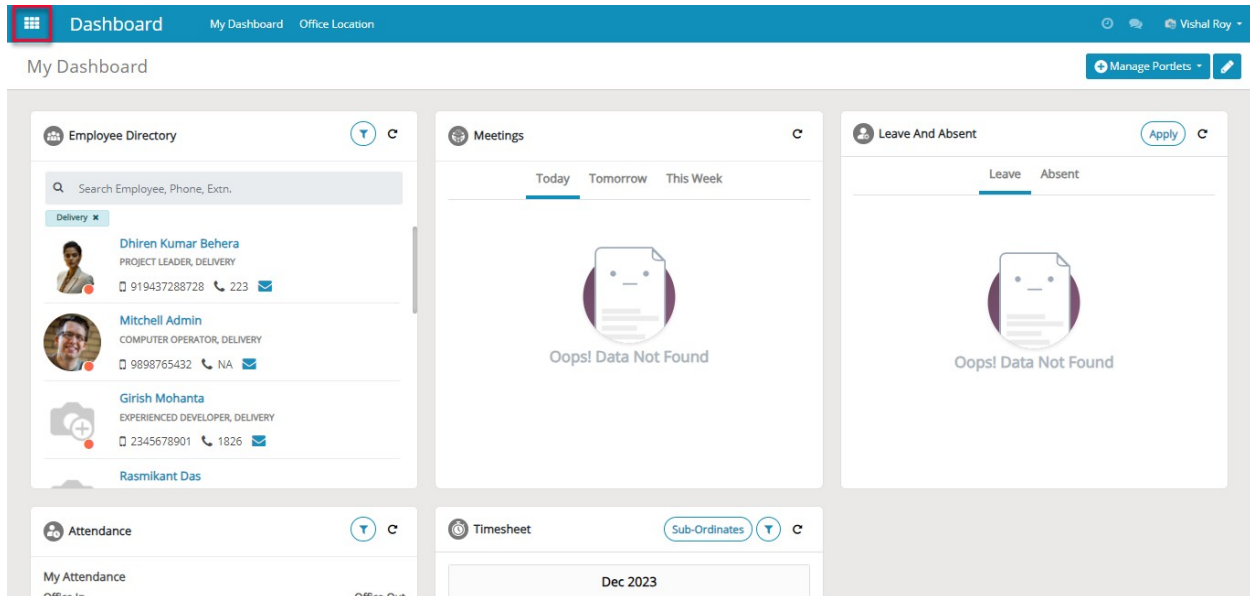



Figure 2-3 My Dashboard


- 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, its approval and assigning the material to the requester.

3.1 MATERIAL REQUEST APPROVAL - STORE MANAGER USER

The request raised by the employee user is received at the Store Manager User for confirmation after approval from SBU representative.

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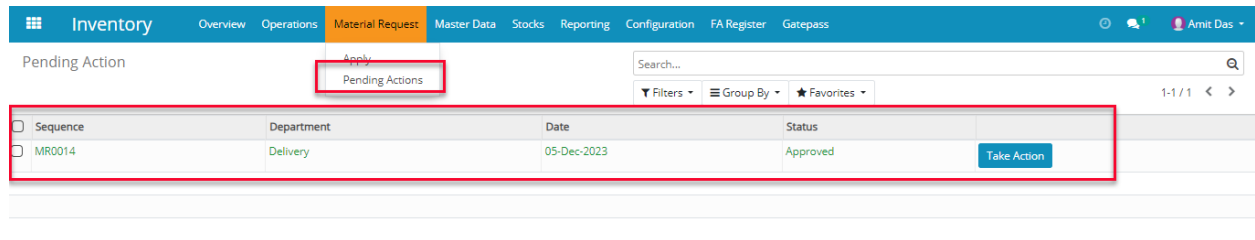



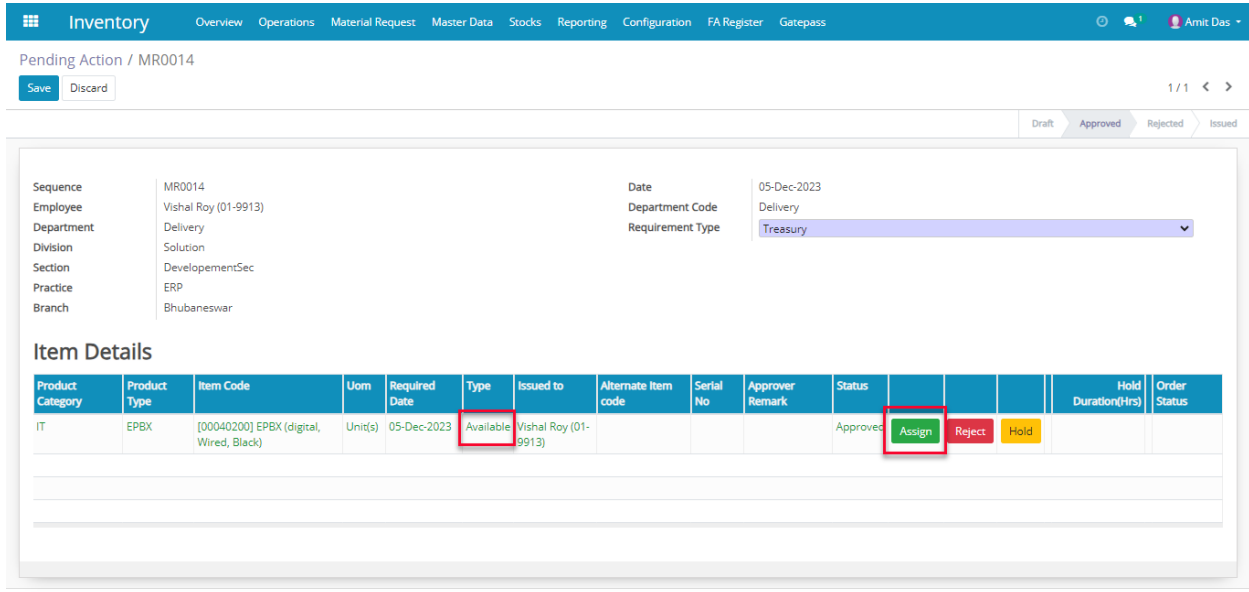
Figure 2-4 Material Request - Pending Request - Store Manager User

- Click on the **Take Action** button. On clicking get navigated to the respective take action section.

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3.1.1 TAKE ACTION - WHEN THE MATERIAL IS AVAILABLE

Take reference from the Fig 3-13 shown below.



The screenshot displays the 'Inventory' management system interface. The top navigation bar includes links for Overview, Operations, Material Request, Master Data, Stocks, Reporting, Configuration, FA Register, and Gatepass. The user 'Amit Das' is logged in. The main content area shows a 'Pending Action / MR0014' form. The form includes fields for Sequence (MR0014), Employee (Vishal Roy (01-9913)), Department (Delivery), Division (Solution), Section (DevelopmentSec), Practice (ERP), and Branch (Bhubaneswar). The Date is 05-Dec-2023, and the Requirement Type is Treasury. Below the form is a table titled 'Item Details' with columns for Product Category, Product Type, Item Code, Uom, Required Date, Type, Issued to, Alternate Item code, Serial No, Approver Remark, Status, and Action. The 'Type' column for the first row is highlighted with a red box, and the 'Assign' button in the Action column is also highlighted with a red box.

Product Category	Product Type	Item Code	Uom	Required Date	Type	Issued to	Alternate Item code	Serial No	Approver Remark	Status	Action
IT	EPBX	[00040200] EPBX (digital, Wired, Black)	Unit(s)	05-Dec-2023	Available	Vishal Roy (01-9913)				Approved	Assign, Reject, Hold


Figure 2-5 Material Request - Pending Request - Take Action- Store Manager User (1)

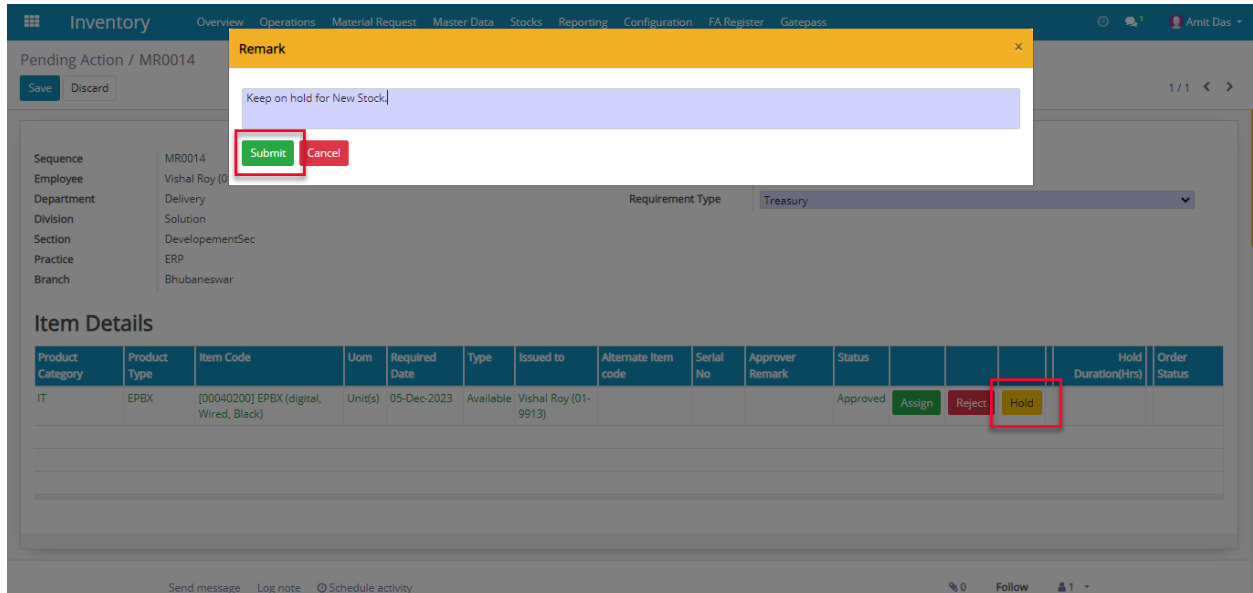
In the Pending Action section, the details of the request are displayed with requirement type and item details.

There are options provided to Assign, Reject and Hold the request.

Note: The Store Manager User can assign the item requested on basis of the availability.

Hold – In case the item request is not available in the current time, but will be available soon, then select the **Hold** option.

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The screenshot shows the 'Inventory' application interface. A 'Pending Action / MR0014' window is active. A 'Remark' dialog box is open, allowing the user to add a remark. The remark text is 'Keep on hold for New Stock.' The 'Submit' button is highlighted with a red box. Below the dialog, the 'Item Details' table is visible, showing the item is on hold.

Product Category	Product Type	Item Code	Uom	Required Date	Type	Issued to	Alternate Item code	Serial No	Approver Remark	Status	Assign	Reject	Hold	Duration(Hrs)	Order Status
IT	EPBX	[00040200] EPBX (digital, Wired, Black)	Unit(s)	05-Dec-2023	Available	Vishal Roy (01-9913)				Approved	Assign	Reject	Hold		

Figure 2-6 Material Request - Pending Request - Take Action- Store Manager User (2)

- Add remarks for the action taken in the textbox.
- Click on the **Submit** button.

On successful submission, the record is kept on hold, and the status is updated.

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	Material Management		

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

Pending Action / MR0014
Save
Discard

1 / 1
<
>

Draft
Hold
Approved
Rejected
Issued

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

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

Item Details

Product Category	Product Type	Item Code	Uom	Required Date	Type	Issued to	Alternate Item code	Serial No	Approver Remark	Status		Hold Duration(Hrs)	Order Status
IT	EPBX	[00040200] EPBX (digital, Wired, Black)	Unit(s)	05-Dec-2023	Available	Vishal Roy (01-9913)			Keep on hold for New Stock.	Hold	Un Hold	00:00	


Figure 2-7 Material Request - Pending Request - Take Action- Store Manager User (3)

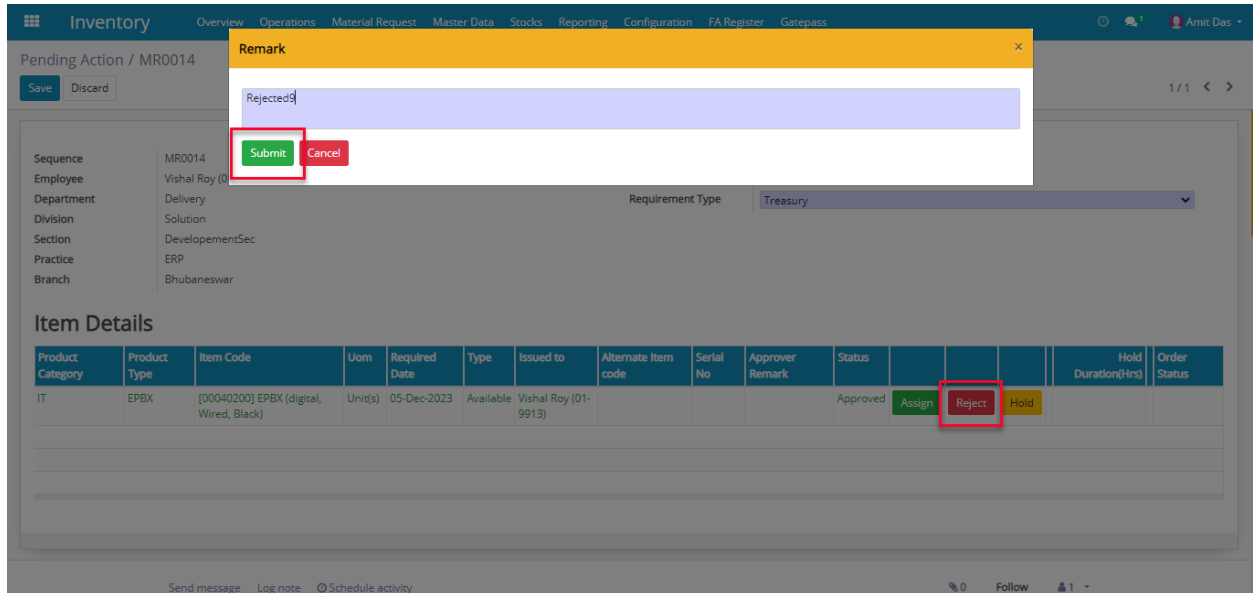
Refer to the highlighted status in the Figure 3-15 shown above.

Reject

In case the request is not validate, then click on the Reject option and cancel the request.

On clicking, option to add remarks populates on the display screen.

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

Pending Action / MR0014

Save Discard

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

Requirement Type: Treasury

Remark

Rejected

Submit Cancel

Item Details


Product Category	Product Type	Item Code	Uom	Required Date	Type	Issued to	Alternate Item code	Serial No	Approver Remark	Status	Assign	Reject	Hold	Hold Duration(Hrs)	Order Status
IT	EPBX	[00040200] EPBX (digital, Wired, Black)	Unit(s)	05-Dec-2023	Available	Vishal Roy (01-9913)				Approved	Assign	Reject	Hold		

Send message Log note Schedule activity

0 Follow 1

Figure 2-8 Material Request - Pending Request - Take Action- Store Manager User (4)

- Add remarks for the action taken in the textbox.
- Click on the **Submit** button.
- Doing so, the current status is updated and displayed in the status section.

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	Material Management		

Inventory													
Overview Operations Material Request Master Data Stocks Reporting Configuration FA Register Gatepass													
Pending Action / MR0015													
Save Discard													
1 / 1 < >													
Draft Approved Rejected Issued													
IT	EPBX	[00050300] EPBX (analog, Wireless, Black)	Unit(s)	05-Dec-2023	Not Available	Vishal Roy (01-9913)		Rejected	Rejected				
IT	EPBX	[00050300] EPBX (analog, Wireless, Black)	Unit(s)	05-Dec-2023	Not Available	Vishal Roy (01-9913)		Rejected	Rejected				
IT	EPBX	[00050300] EPBX (analog, Wireless, Black)	Unit(s)	05-Dec-2023	Not Available	Vishal Roy (01-9913)		Rejected	Rejected				
IT	EPBX	[00050300] EPBX (analog, Wireless, Black)	Unit(s)	05-Dec-2023	Not Available	Vishal Roy (01-9913)		Approved	Assign	Reject	Hold		Create Requisition
IT	EPBX	[00050300] EPBX (analog, Wireless, Black)	Unit(s)	05-Dec-2023	Not Available	Vishal Roy (01-9913)		Approved	Assign	Reject	Hold		Create Requisition
IT	EPBX	[00050300] EPBX (analog, Wireless, Black)	Unit(s)	05-Dec-2023	Not Available	Vishal Roy (01-9913)		Approved	Assign	Reject	Hold		Create Requisition

Figure 2-9 Material Request - Pending Request - Take Action- Store Manager User (5)

Refer to the screen shared above.

Assign

To allot the item to the requester, click on the **Assign** button.

Inventory

Overview

Operations

Material Request

Master Data

Stocks

Reporting

Configuration

FA Register

Gatepass

1

Amit Das

Pending Action / MR0014

Save

Discard

1 / 1 < >

Draft

Approved

Rejected

Issued

Sequence

Employee

Department

Division

Section

Practice

Branch

MR0014

Vishal Roy (01-9913)

Delivery

Solution

DevelopmentSec

ERP

Bhubaneswar

Date

Department Code

Requirement Type

05-Dec-2023


Delivery

Treasury

Item Details

Product Category	Product Type	Item Code	Uom	Required Date	Type	Issued to	Alternate Item code	Serial No	Approver Remark	Status				Hold Duration(Hrs)	Order Status
IT	EPBX	[00040200] EPBX (digital, Wired, Black)	Unit(s)	05-Dec-2023	Avail	Vishal Roy (0		EPBX (c		Approved	Assign	Reject	Hold		

Figure 2-10 Material Request - Pending Request - Take Action- Store Manager User (6)

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- Select a Serial Number of the Item to be assigned.
- Click on the **Assign** button. On clicking, a textbox to add remarks populates on the display screen.

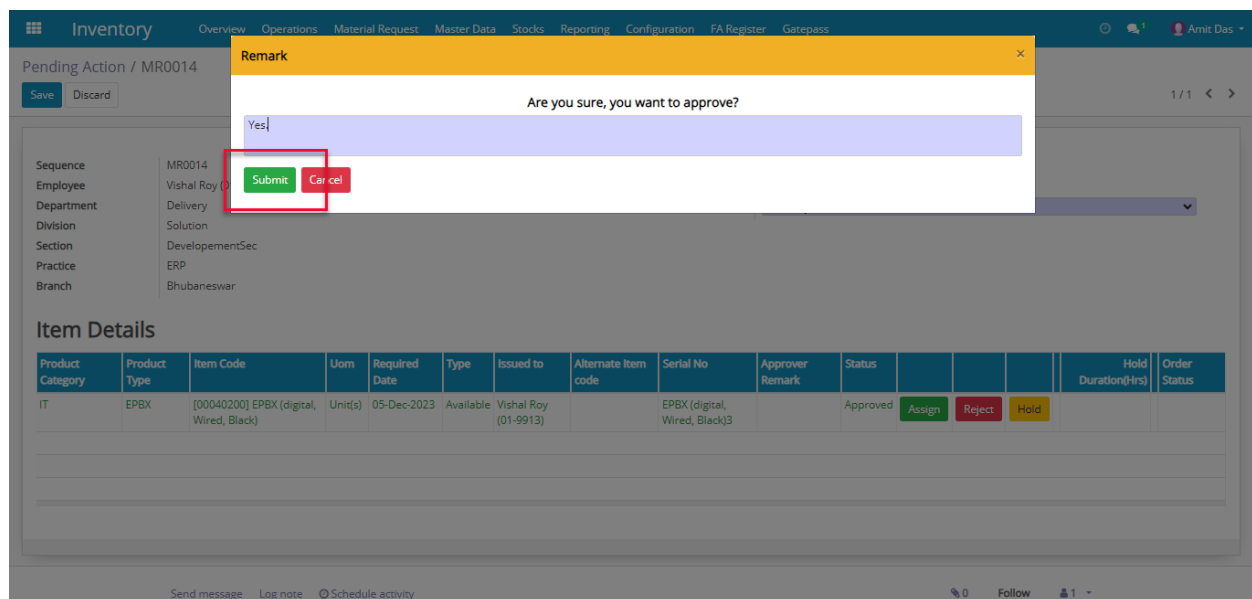



Figure 2-11 Material Request - Pending Request - Take Action- Store Manager User (7)

- Add remarks in the textbox for the action taken.
- Click on the **Submit** button.

On submission, the item is issued to the requester.

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Inventory

OverviewOperationsMaterial RequestMaster DataStocksReportingConfigurationFA RegisterGatepass

Amit Das

Pending Action / MR0014

SaveDiscard

1 / 1 < >

Sequence

MR0014

Date

05-Dec-2023

Employee

Vishal Roy (01-9913)

Department Code

Delivery

Department

Delivery

Requirement Type

Treasury

Division

Solution

Section

DevelopementSec

Practice

ERP

Branch

Bhubaneswar

Item Details


Product Category	Product Type	Item Code	Uom	Required Date	Type	Issued to	Alternate Item code	Serial No	Approver Remark	Status	Hold Duration(Hrs)	Order Status
IT	EPBX	[00040200] EPBX (digital, Wired, Black)	Unit(s)	05-Dec-2023	Available	Vishal Roy (01-9913)		EPBX (digital, Wired, Black)3	Yes.	Issued		

Figure 2-12 Material Request - Pending Request - Take Action- Store Manager User (8)

Refer to the highlighted status in the screen shared above.

3.1.2 TAKE ACTION - WHEN THE MATERIAL IS NOT AVAILABLE

If the item requested is not available in the stock, then the Store Manager can raise request for Requisition.

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

Pending Action / MR0015

Save Discard

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Draft Approved Rejected Issued

Sequence: MR0015
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	Required Date	Type	Issued to	Alternate Item code	Serial No	Approver Remark	Status	Assign	Reject	Hold	Hold Duration(Hrs)	Create Requisition	Order Status
IT	EPBX	[00050300] EPBX (analog, Wireless, Black)	Unit(s)	05-Dec-2023	Not Available	Vishal Roy (01-9913)				Approved	Assign	Reject	Hold		Create Requisition	
IT	EPBX	[00050300] EPBX (analog, Wireless, Black)	Unit(s)	05-Dec-2023	Not Available	Vishal Roy (01-9913)				Approved	Assign	Reject	Hold		Create Requisition	
IT	EPBX	[00050300] EPBX (analog, Wireless, Black)	Unit(s)	05-Dec-2023	Not Available	Vishal Roy (01-9913)				Approved	Assign	Reject	Hold		Create Requisition	

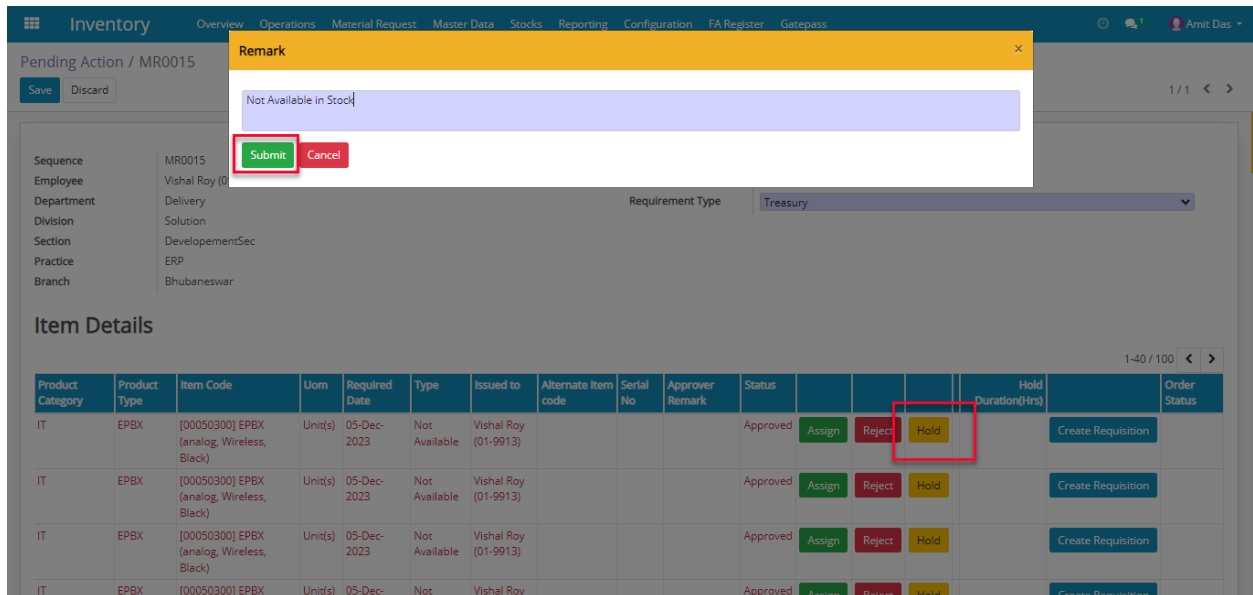
Figure 2-13 Material Request - Pending Request - Take Action- Store Manager User (9)

The availability status of the Item is displayed in the item details, as displayed in the Figure above.

3.1.2.1 CREATE REQUISITION

In order to create the requisition, the user needs to keep the record on hold. To do so, click on the **Hold** button. On clicking, a separate window to add remarks populate on the display screen.

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

Pending Action / MR0015

Save Discard

Sequence: MR0015
Employee: Vishal Roy (0)
Department: Delivery
Division: Solution
Section: DevelopmentSec
Practice: ERP
Branch: Bhubaneswar


Requirement Type: Treasury

Item Details

Product Category	Product Type	Item Code	Uom	Required Date	Type	Issued to	Alternate Item code	Serial No	Approver Remark	Status	Assign	Reject	Hold	Duration(Hrs)	Create Requisition	Order Status
IT	EPBX	[00050300] EPBX (analog, Wireless, Black)	Unit(s)	05-Dec-2023	Not Available	Vishal Roy (01-9913)				Approved	Assign	Reject	Hold		Create Requisition	
IT	EPBX	[00050300] EPBX (analog, Wireless, Black)	Unit(s)	05-Dec-2023	Not Available	Vishal Roy (01-9913)				Approved	Assign	Reject	Hold		Create Requisition	
IT	EPBX	[00050300] EPBX (analog, Wireless, Black)	Unit(s)	05-Dec-2023	Not Available	Vishal Roy (01-9913)				Approved	Assign	Reject	Hold		Create Requisition	
IT	EPBX	[00050300] EPBX	Unit(s)	05-Dec-	Not	Vishal Roy				Approved	Assign	Reject	Hold		Create Requisition	

Figure 2-14 Material Request - Pending Request - Take Action- Store Manager User (10)

- Add remarks in the textbox provided.
- Click on the **Submit** button.
- On clicking the submit button, click on the Create Requisition button for respective record. Refer to the screen shared below.

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

Pending Action / MR0015

Save Discard

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Draft Approved Rejected Issued


Sequence: MR0015
 Employee: Vishal Roy (01-9913)
 Date: 05-Dec-2023
 Department: Delivery
 Division: Solution
 Section: DevelopementSec
 Practice: ERP
 Branch: Bhubaneswar
 Department Code: Delivery
 Requirement Type: Treasury

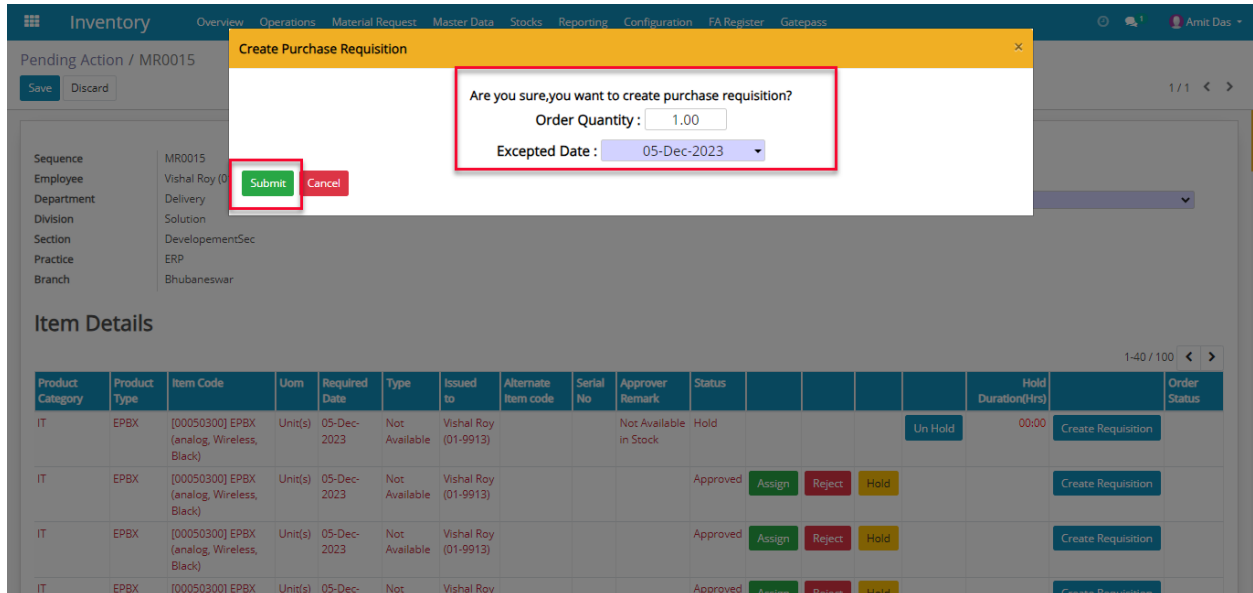
Item Details

Product Category	Product Type	Item Code	Uom	Required Date	Type	Issued to	Alternate Item code	Serial No	Approver Remark	Status	Un Hold	Hold Duration(Hrs)	Order Status
IT	EPBX	[00050300] EPBX (analog, Wireless, Black)	Unit(s)	05-Dec-2023	Not Available	Vishal Roy (01-9913)			Not Available in Stock	Hold	Un Hold	00:00	Create Requisition
IT	EPBX	[00050300] EPBX (analog, Wireless, Black)	Unit(s)	05-Dec-2023	Not Available	Vishal Roy (01-9913)			Approved	Assign Reject Hold			Create Requisition
IT	EPBX	[00050300] EPBX (analog, Wireless, Black)	Unit(s)	05-Dec-2023	Not Available	Vishal Roy (01-9913)			Approved	Assign Reject Hold			Create Requisition

Figure 2-15 Material Request - Pending Request - Take Action- Store Manager User (11)

- With reference to the Figure shown above, on clicking the **Create Requisition** button a confirmation alert message populates on the display screen saying - Are you sure, you want to create purchase requisition.

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The screenshot displays the 'Inventory' application interface. A 'Create Purchase Requisition' dialog box is open, prompting the user to confirm the creation of a requisition. The dialog includes a confirmation message, a text input for 'Order Quantity' (set to 1.00), and a date selector for 'Expected Date' (set to 05-Dec-2023). A green 'Submit' button and a red 'Cancel' button are visible. In the background, the 'Pending Action / MR0015' section shows a list of items with details like Product Category, Product Type, Item Code, and Status. The 'Item Details' table lists items with their respective codes, quantities, and statuses, along with action buttons like 'Assign', 'Reject', 'Hold', and 'Create Requisition'.


Figure 2-16 Material Request - Pending Request - Take Action- Store Manager User (12)

Here, user has the facility to update the quantity to be ordered.

- Select the Order Quantity from the drop-down.
- Select the Expected Date for delivery.
- Click on the **Submit** button.

On successful submission, the requisition for the item is raised successfully and pending for approval at the authority end.

User can see the current status of the Order in the Pending Action section. Refer to the Fig 3-25 shown below.

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Inventory

OverviewOperationsMaterial RequestMaster DataStocksReportingConfigurationFA RegisterGatepass

Amit Das

Pending Action / MR0015

Save

Discard

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Draft

Approved

Rejected

Issued

Sequence

Employee

Department

Division

Section

Practice

Branch

MR0015

Vishal Roy (01-9913)

Delivery

Solution

DevelopmentSec

ERP

Bhubaneswar

Date

Department Code

Requirement Type

05-Dec-2023

Delivery

Treasury

Item Details

Product Category	Product Type	Item Code	Uom	Required Date	Type	Issued to	Alternate Item code	Serial No	Approver Remark	Status						Hold Duration(Hrs)		Order Status	
IT	EPBX	[00050300] EPBX (analog, Wireless, Black)	Unit(s)	05-Dec-2023	Not Available	Vishal Roy (01-9913)			Requisition Created by Amit Das	Hold						Un Hold	00:01		Requisition
IT	EPBX	[00050300] EPBX (analog, Wireless, Black)	Unit(s)	05-Dec-2023	Not Available	Vishal Roy (01-9913)				Approved	Assign	Reject	Hold					Create Requisition	
IT	EPBX	[00050300] EPBX (analog, Wireless, Black)	Unit(s)	05-Dec-2023	Not Available	Vishal Roy (01-9913)				Approved	Assign	Reject	Hold					Create Requisition	

Figure 2-17 Material Request - Pending Request - Take Action- Store Manager User (13)