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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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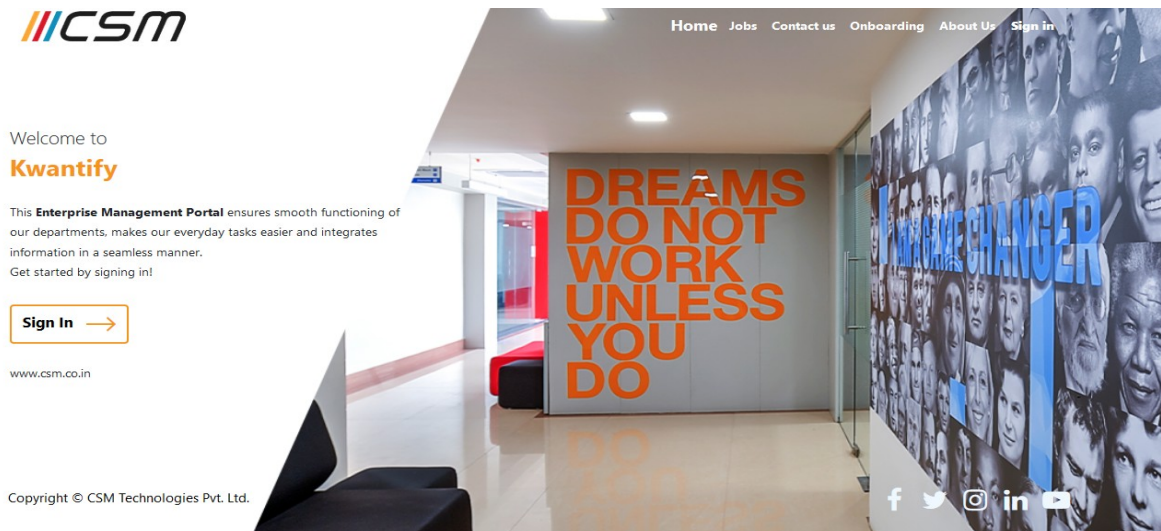


Figure 2-1 Welcome Screen

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

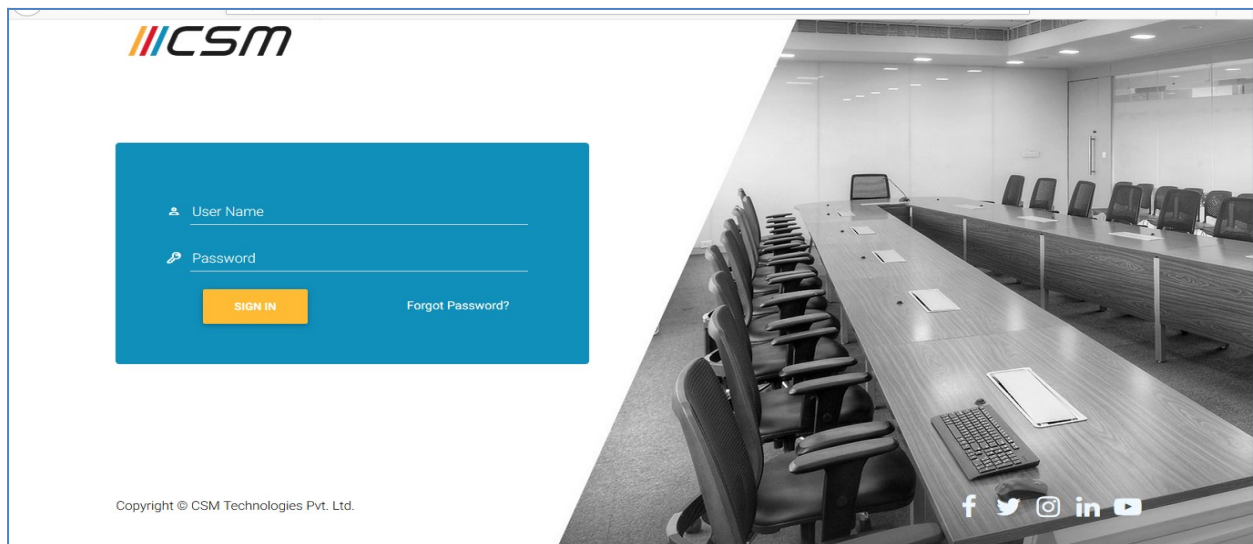


Figure 2-2 Login Screen

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.

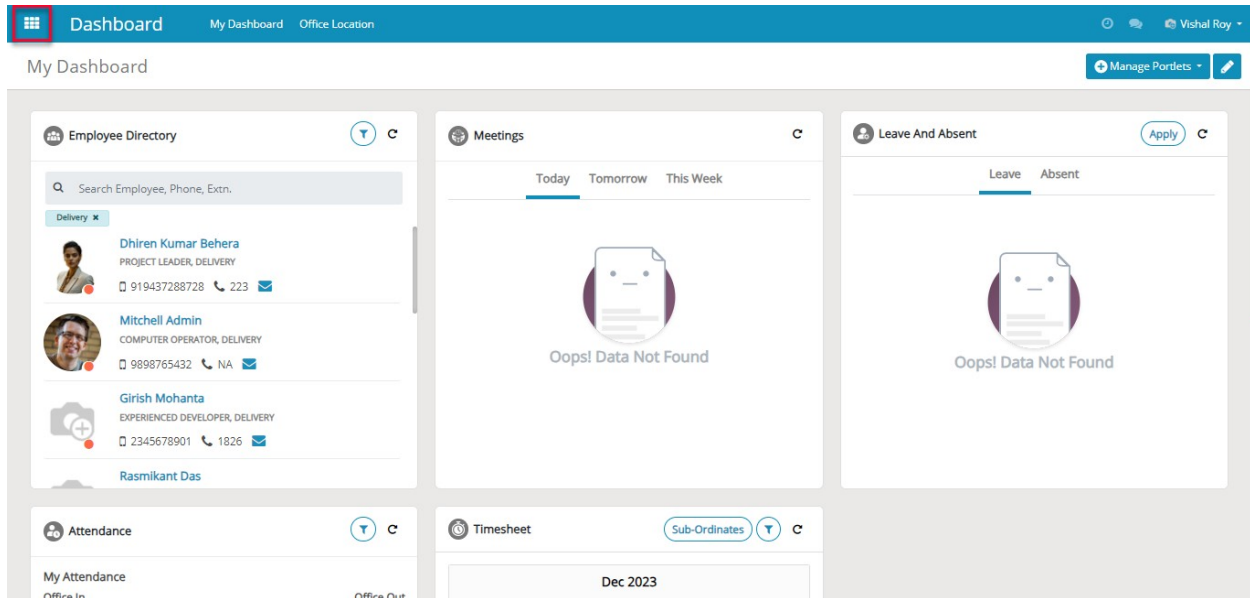



Figure 2-3 My Dashboard

- 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.

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3.1 RAISE NEW MATERIAL REQUEST

An employee is authorized to raise the request for an item or product from the organization. To do so, the user needs to go to the.

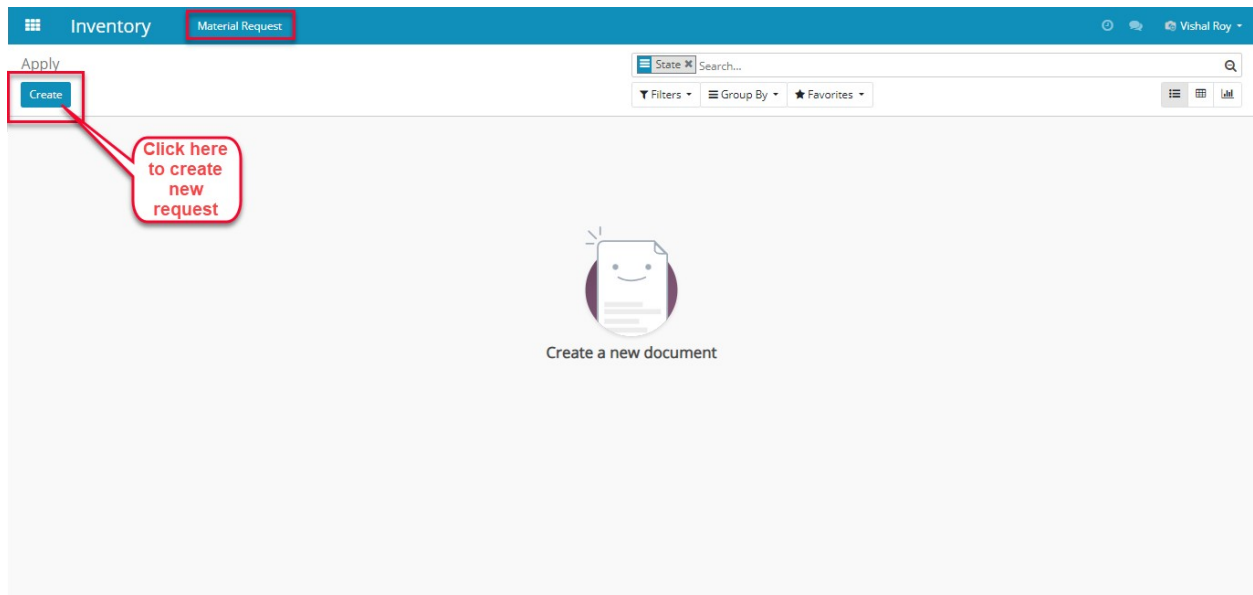


Figure 3-4 Material Request

- Click on the **Create** button to apply for new material request.
- On clicking, get navigated to the respective “**Apply**” page.

The screenshot shows the 'Apply / New' page for a material request. The 'Save' button is highlighted with a red box. The form includes fields for Sequence, Employee, Department, Division, Section, Practice, Branch, Date, Department Code, Requirement Type, and a table for Item Details.

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

Figure 3-5 Apply/New - Material Request

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- The details of the employee user are already providing here.
- To apply for a new material request, select the Date of Application if required, or else the system will fetch the current date.
- Select the Requirement Type.

Add the Item Details

- Select the Product Category, Product Type, Item Code, and Uom.
- Enter the Quantity Required.
- Select the Required Date.
- Select the Name of the Person to whom the Item is to be issued.
- The Current Status of the request is shown.
- In case the details provided is not correct, user has the option to delete the record by clicking the **Delete** (🗑️) icon.
- On entering all the details, click on the **Save** button.
 - o Or, Choose **Discard** button to delete the details entered.

On saving the record data is added in the system.

The screenshot displays the 'Material Request' form in the 'Inventory' module. The form is titled 'Apply / MR0014' and includes buttons for 'Edit', 'Create', and 'Send For Approval' (highlighted with a red box). The form fields are organized into two columns: 'Employee' details (Sequence, Employee, Department, Division, Section, Practice, Branch) and 'Request' details (Date, Department Code, Requirement Type). Below these fields is the 'Item Details' table, which lists the product category, product type, item code, uom, quantity required, required date, issued to, and status.

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

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)	Draft

Figure 3-6 Edit - Material Request

- To update any changes, click on the **Edit** button.
- If all the field details are correct, then click on Send for Approval button to send the request for approval.

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- On clicking, a confirmation alert message appears on the display screen saying - Are you sure you want to request the item.

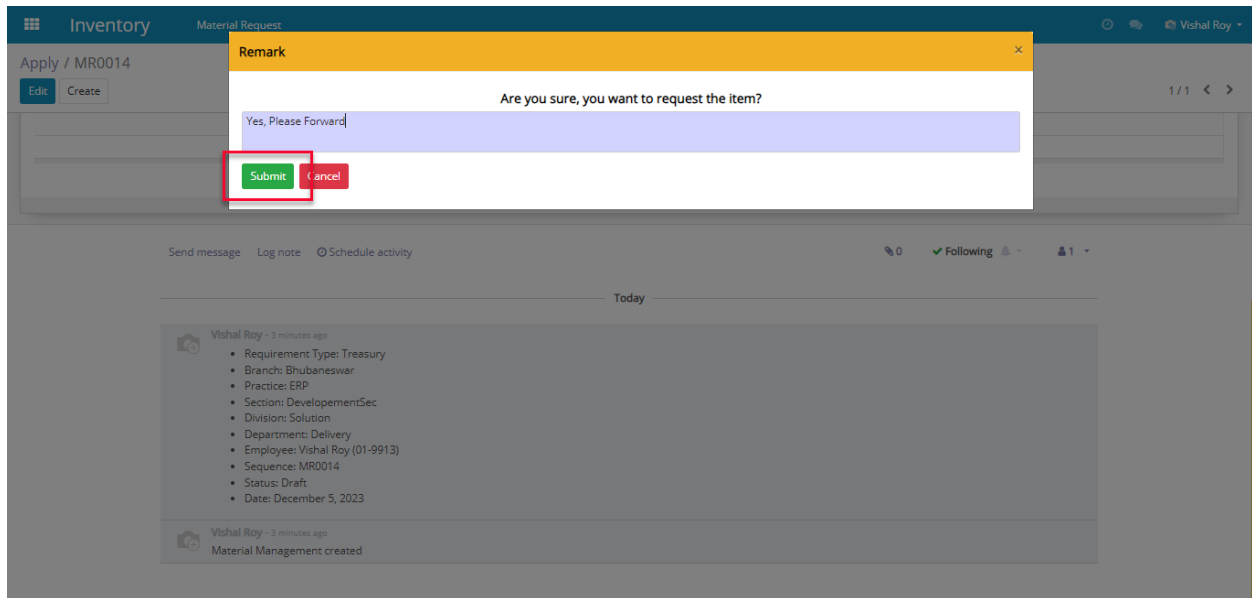


Figure 3-7 Confirmation Alert Message

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