User Guide - Stock Management

Stock Management

<u>This document will guide user</u>

1. How to create new card request
2. How to upload file for card requests
3. How to receive card from vender
4. How to view cards on list
5. How to edit card request
6. How to transfer card to another location
7. How to track transferred card
8. How to check the card inventory

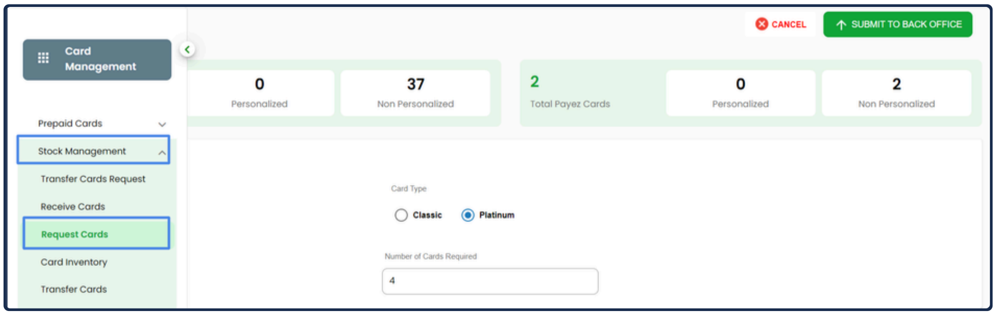
<u>User Roles:</u>

Branch Representative

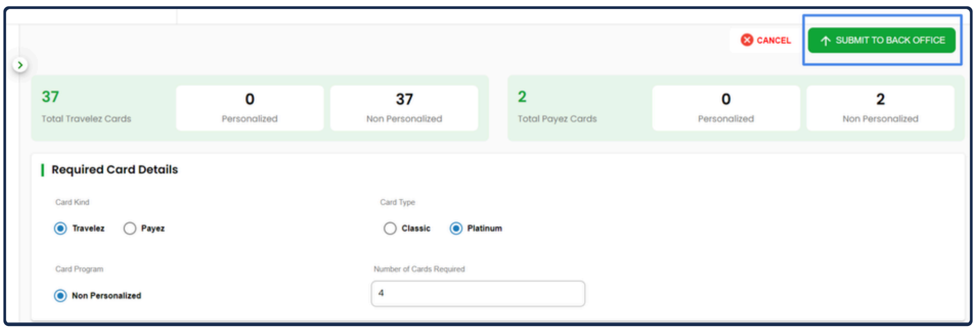
Operational Manager

Create New Card Request (Branch Representative)

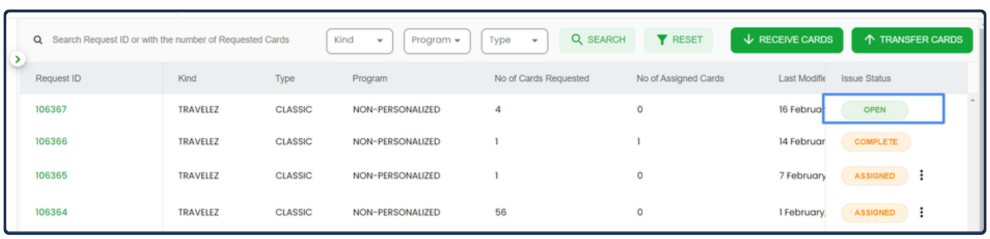
1. Login with Branch User role, and navigate to Card Management and click on Stock Management



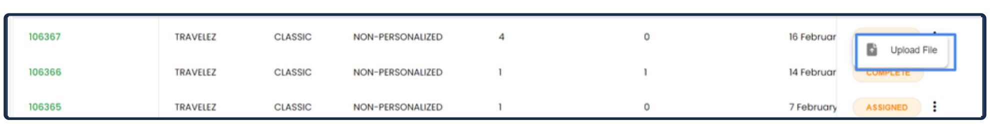
2. Fill out the form and press Done button



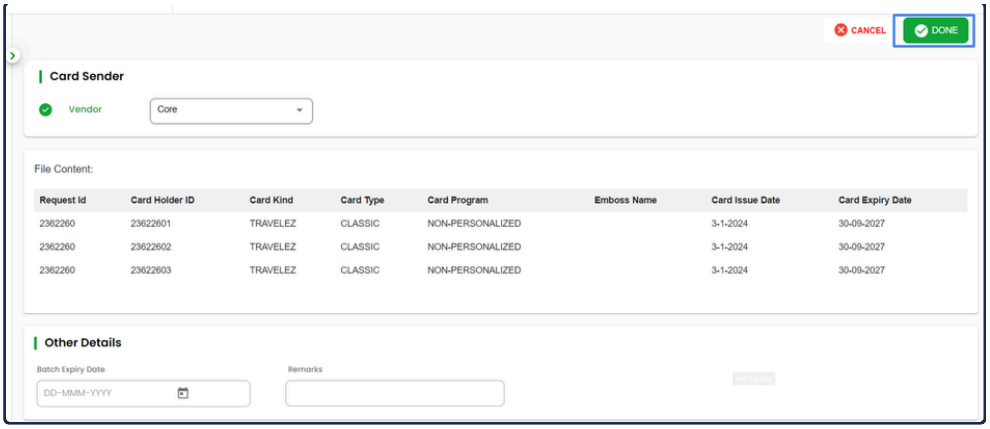
3. Check card status on receive card screen



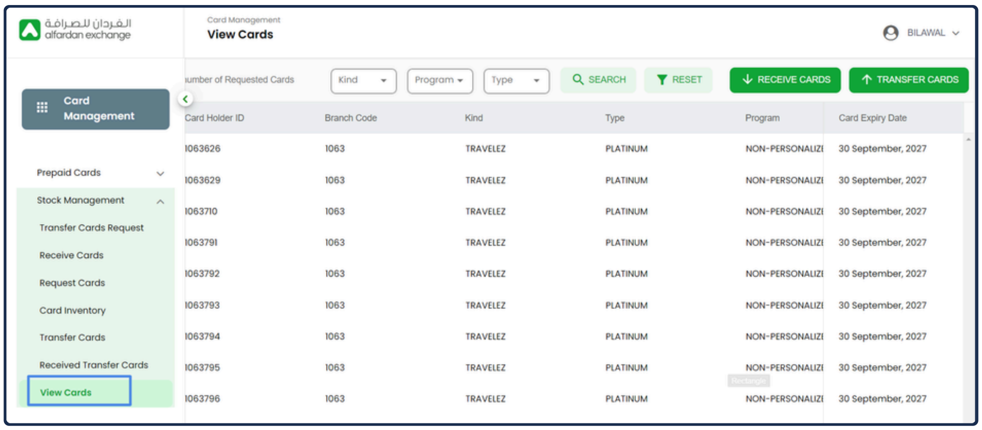
4. Once card request status updated as Assigned, click on context menu and then upload file

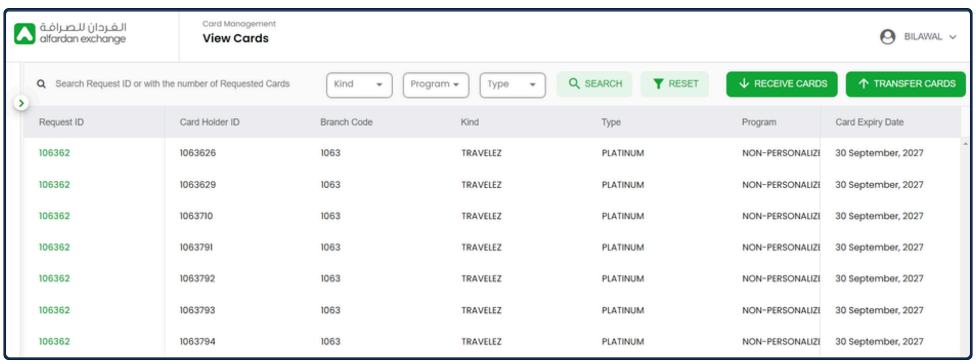


5. Click on file upload option, upload a file and press Done button

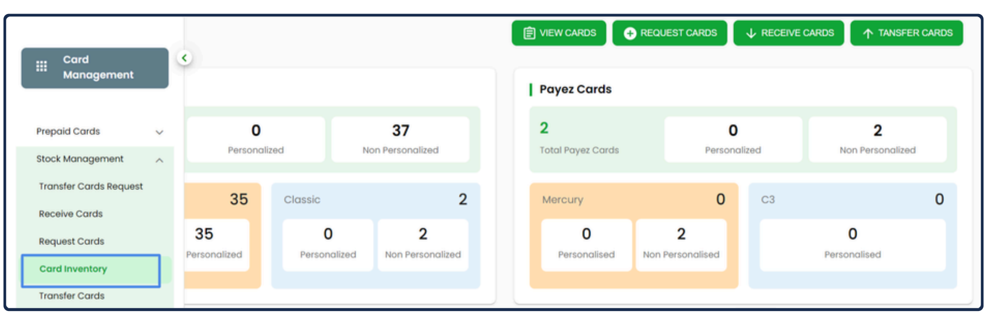


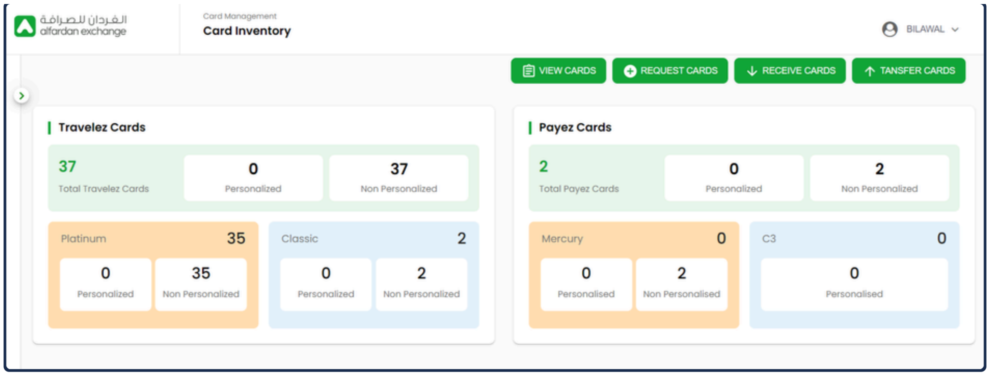
6. Click on view card tab, all uploaded card records are appearing





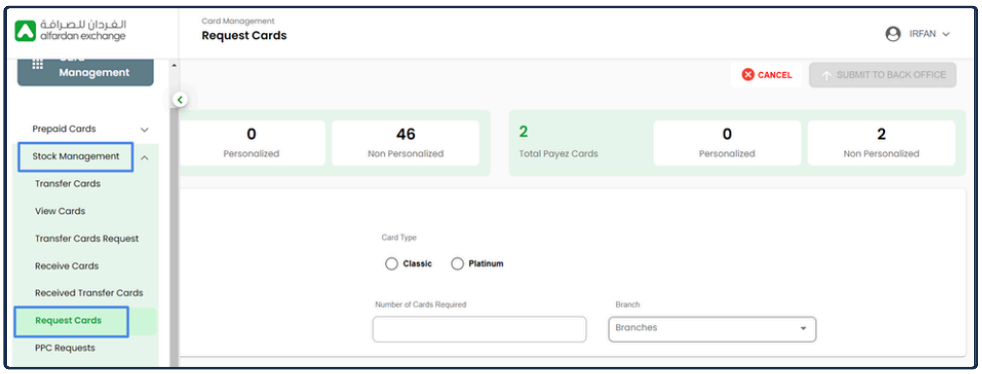
7. Click on card inventory to check the numbers of created card



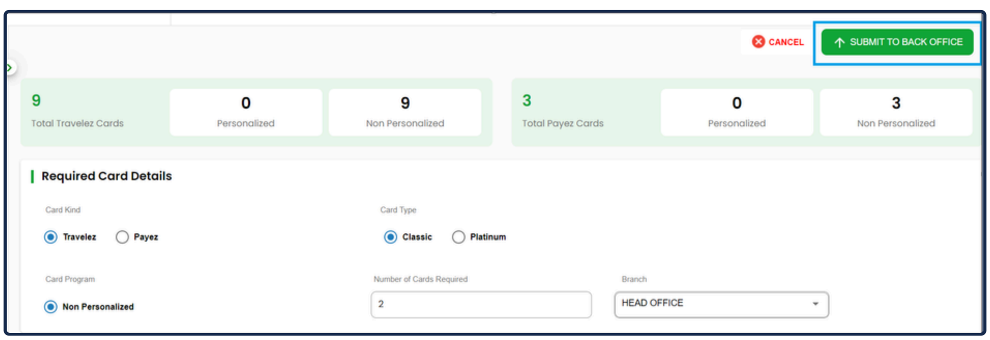


Create New Card Request (Operational Manager)

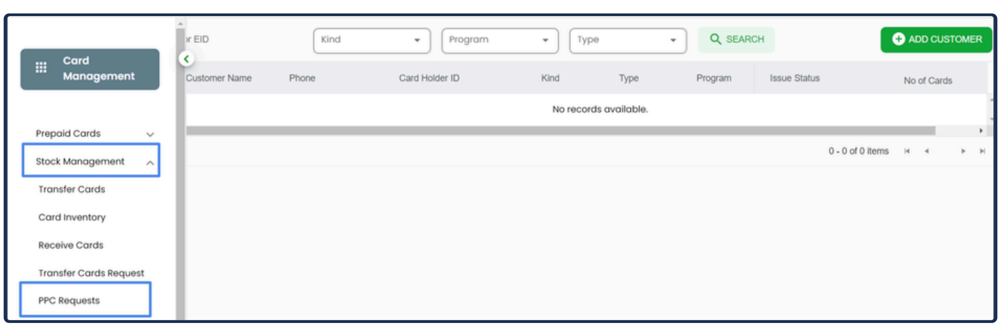
1. Login with Operation Manager role, and navigate to Card Management and click on Stock Management

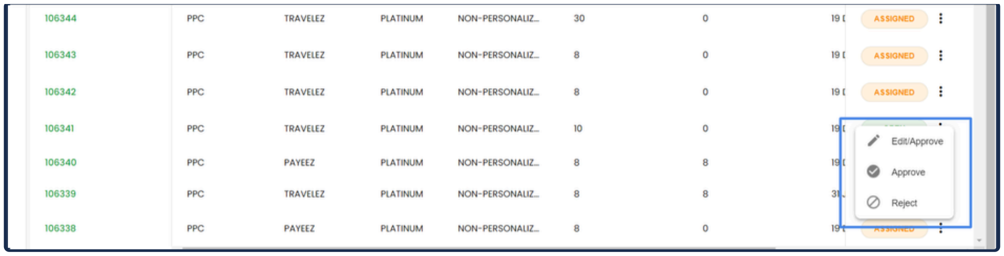


2. Operation Manager has an option to select Branch for card request, fill the form Done button

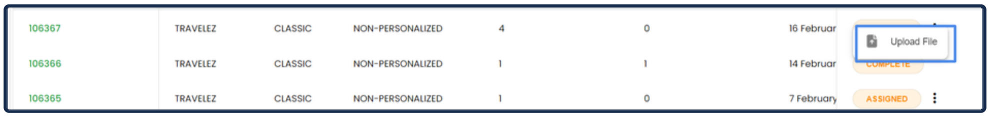


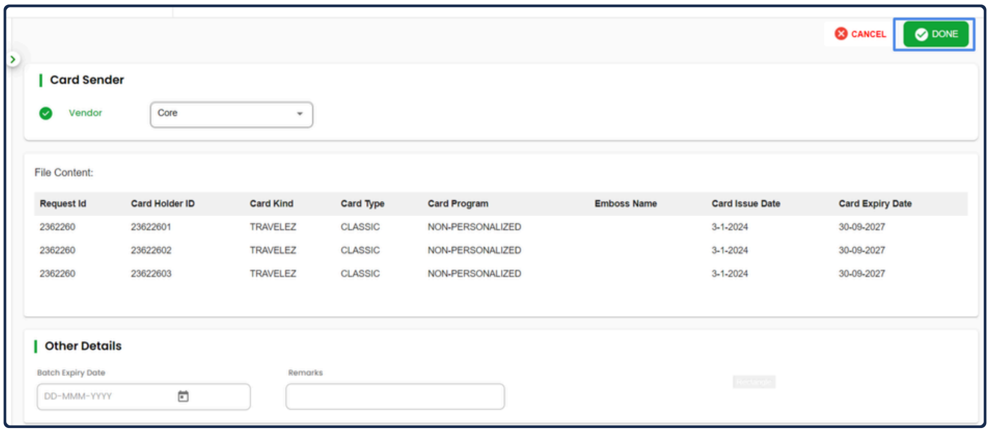
3. Click on PPC Request to Edit/ Approve/ Reject requests



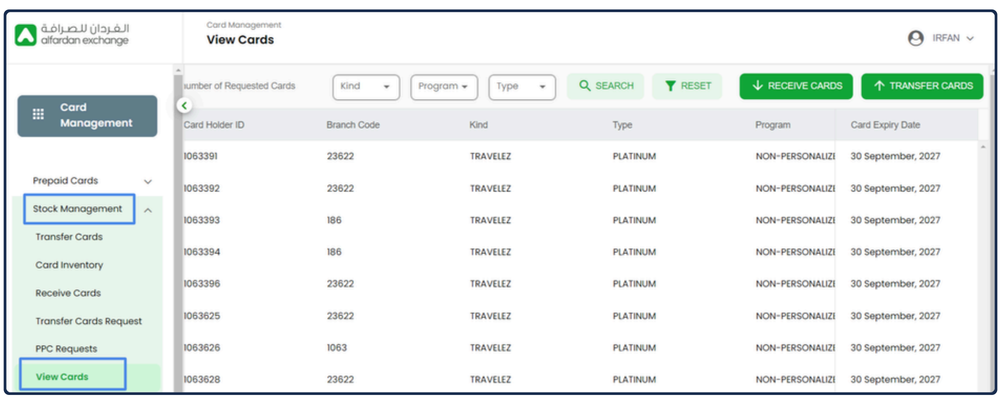


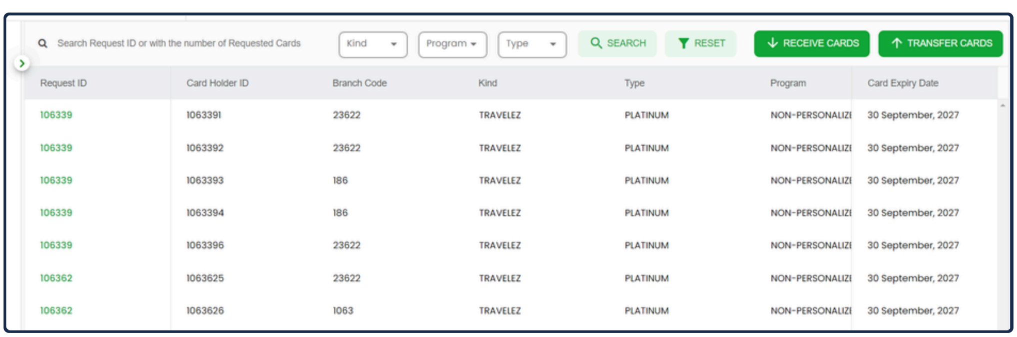
5. Operation Manager could also upload the file by clicking from context menu, when status is Assigned



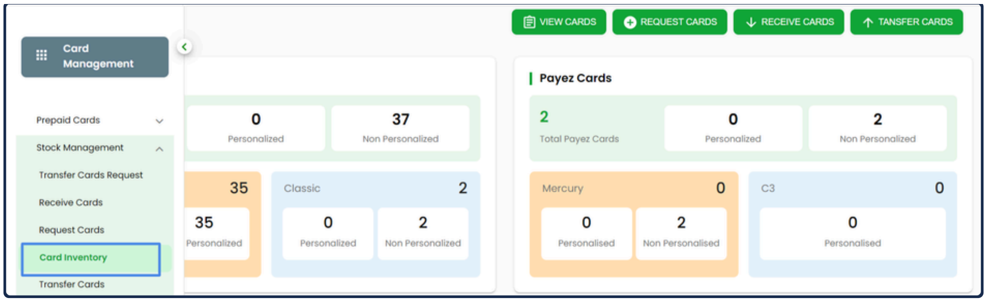


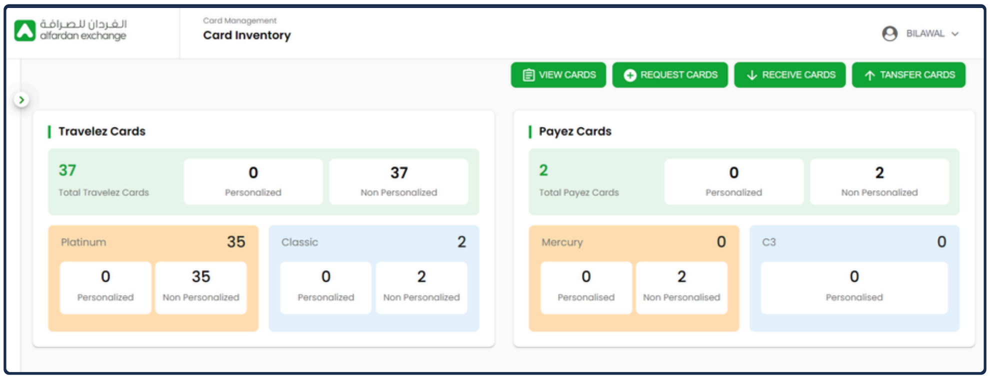
6. Click on view card tab, all uploaded card records are appearing





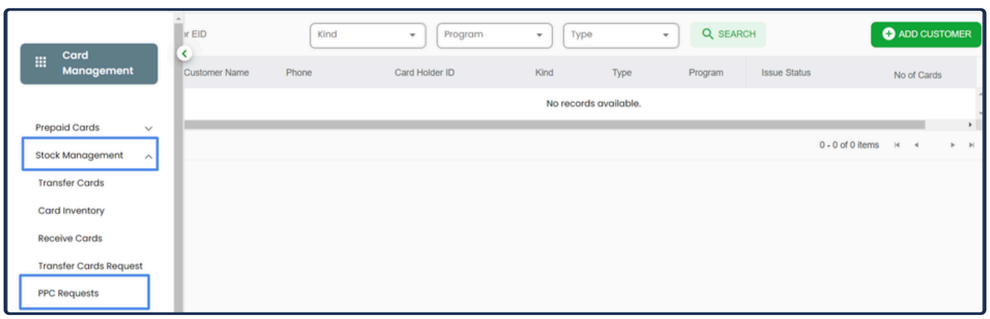
7. Click on card inventory to check the numbers of created card





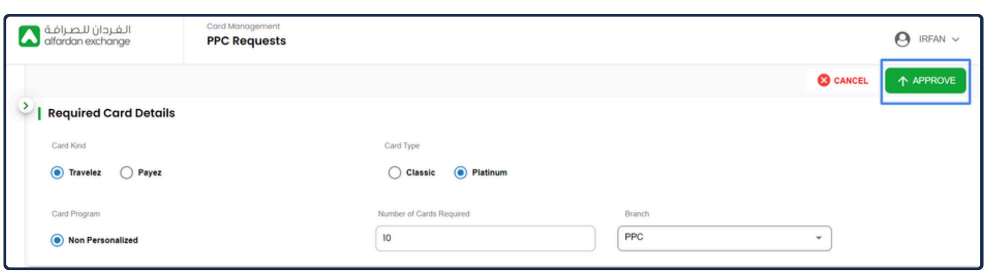
Edit Card Request (Operational Manager)

1. Operation Manager has an option to edit card request for Branch User



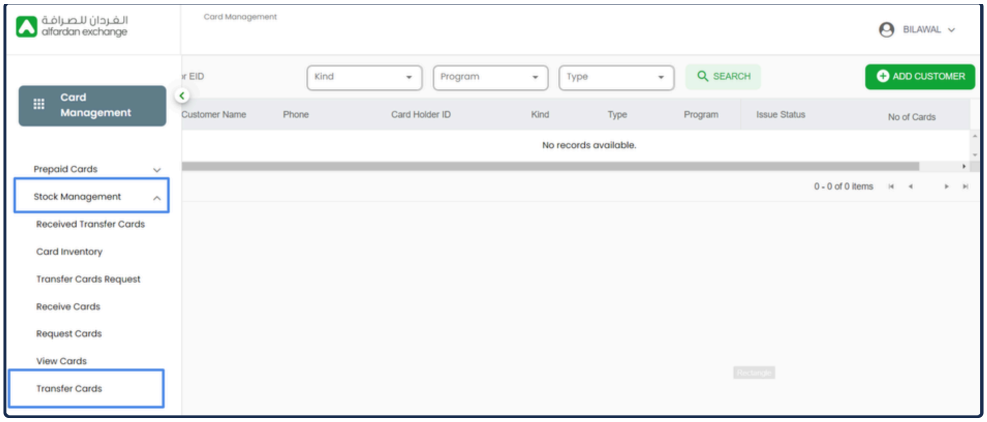
2. On PPC request page, record with Open status click on Edit option from context menu

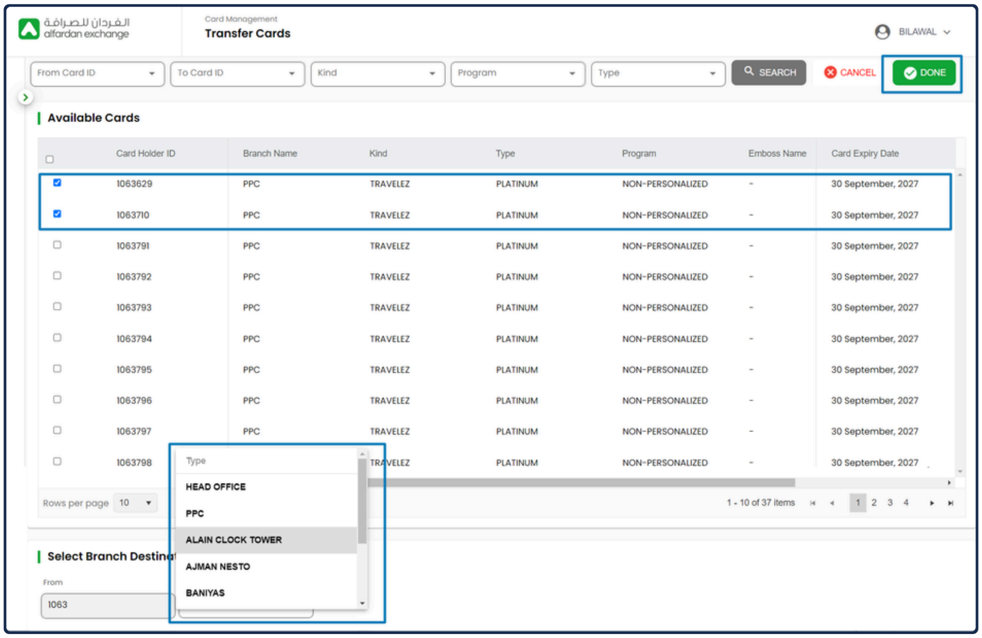
3. Edit card type, kind or number of cards and press Approve button



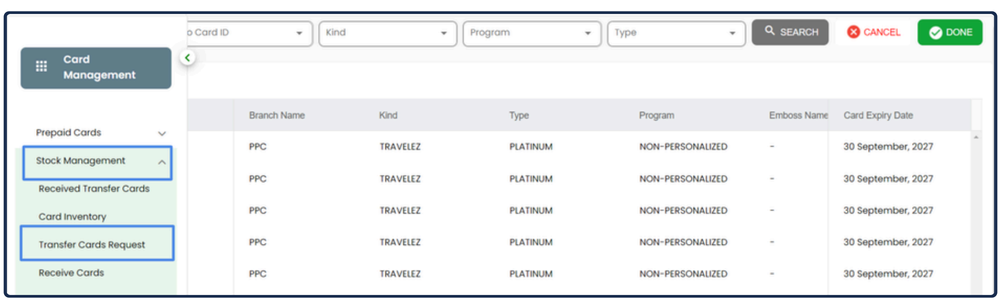
Transfer Card (Branch Representative)

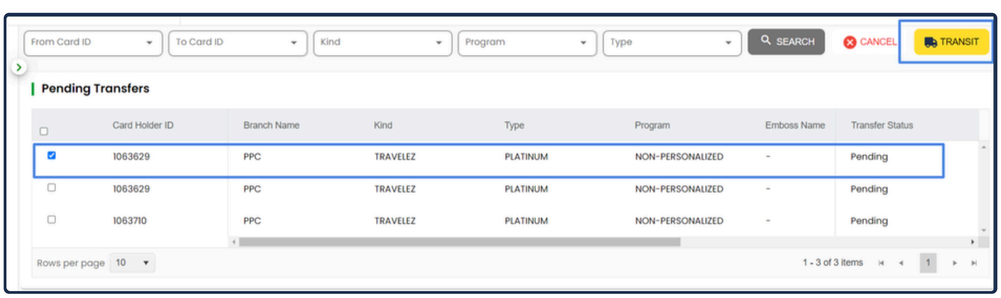
1. Log in as Branch User, click on Transfer card, select card and Branch Destination and press Done button



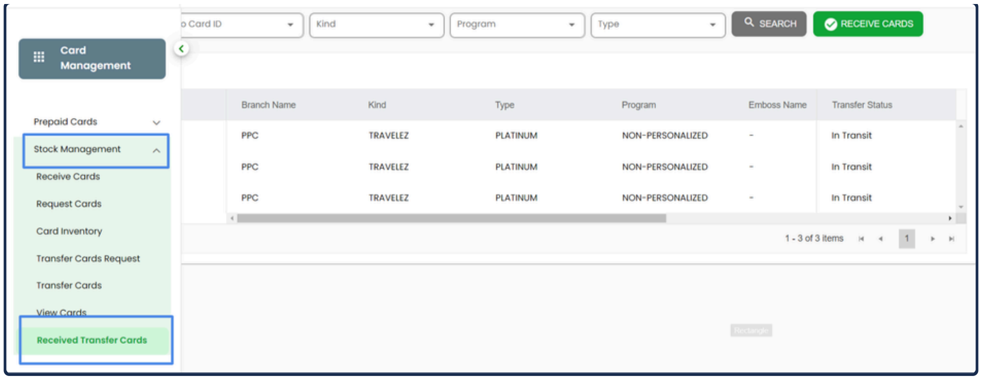


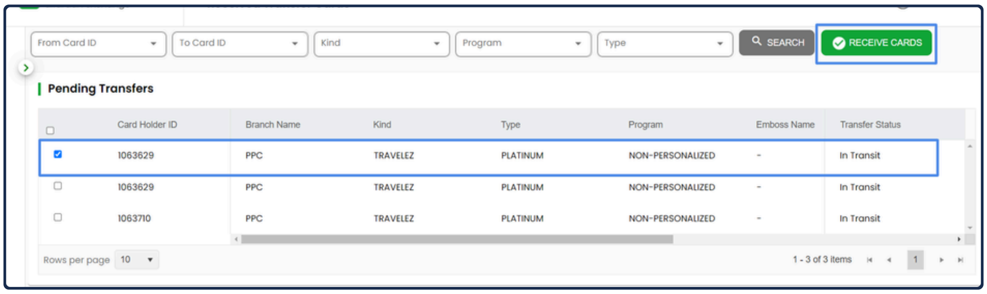
2. Click on Transfer card request, select record and press Transit button



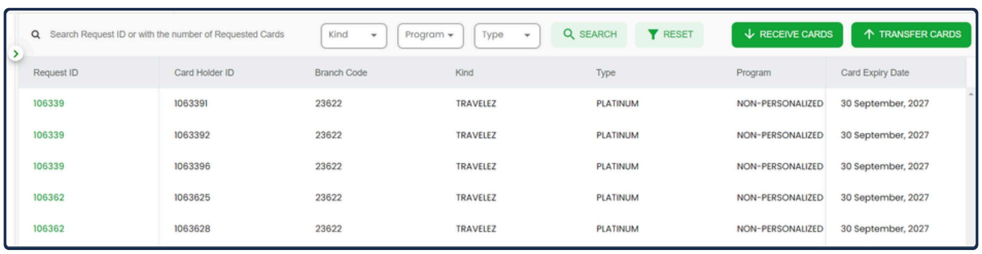


3. Branch that to which card is transferred, could click on Transfer card receive, select record and press Receive button



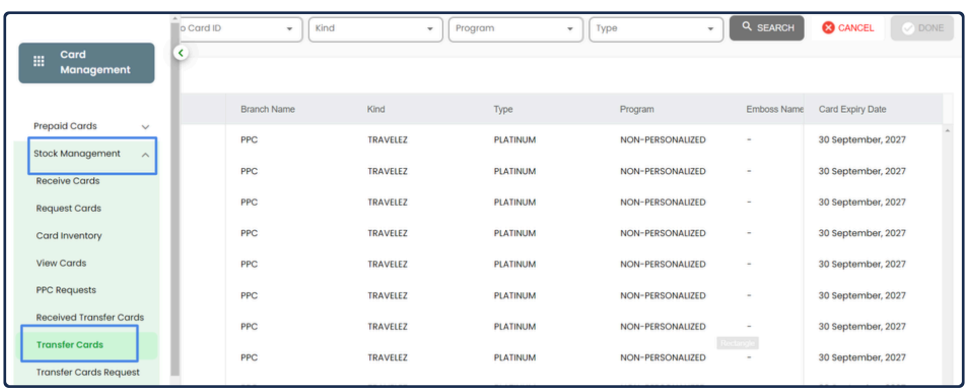


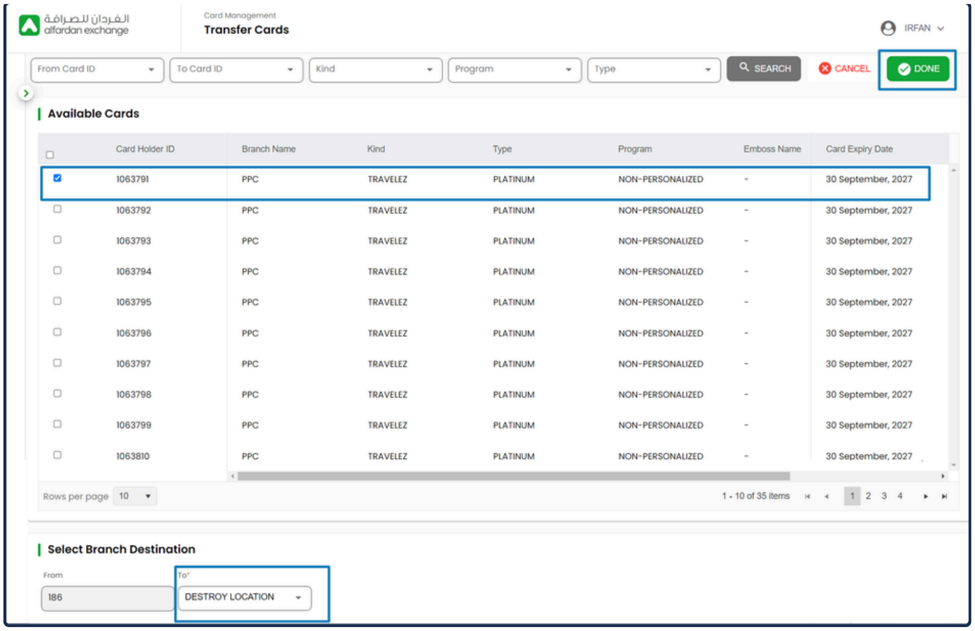
4. Click on View card to check Transferred card



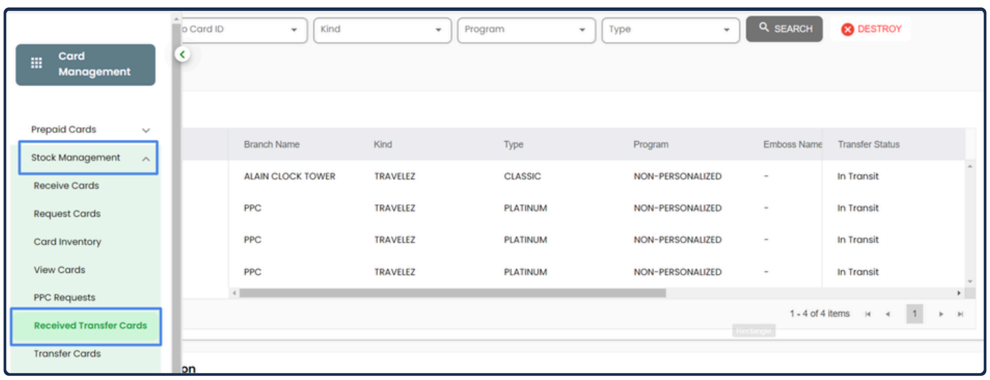
Transfer Card (Operational Manager)

1. Log in as Operational Manager, click on Transfer card, select card and Branch Destination as Destroy and press Done button





2. Click on Transfer receive card when any branch transferred card to Operational Manager



3. Operational Manager has options whether Receive card or Destroy Cards