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# TRAINING MANUAL ON BUYING MODULE

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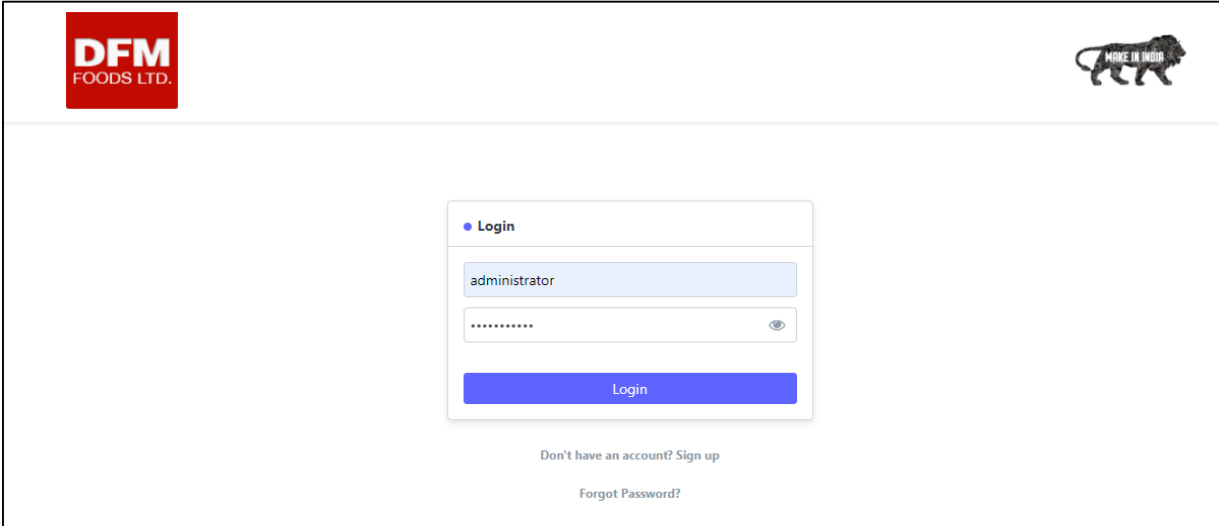


[DATE]

DFM FOODS LTD.  
[Company address]

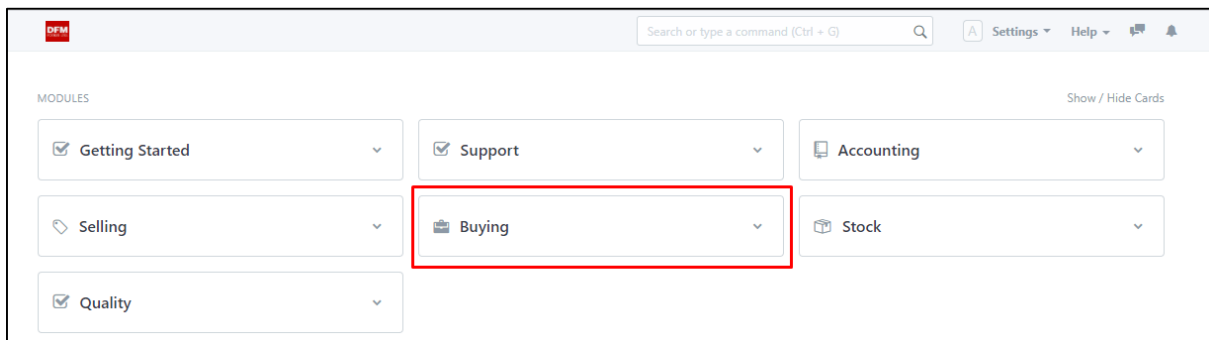
## ERPNext System

- Login page of DFM Foods ERP Next system.

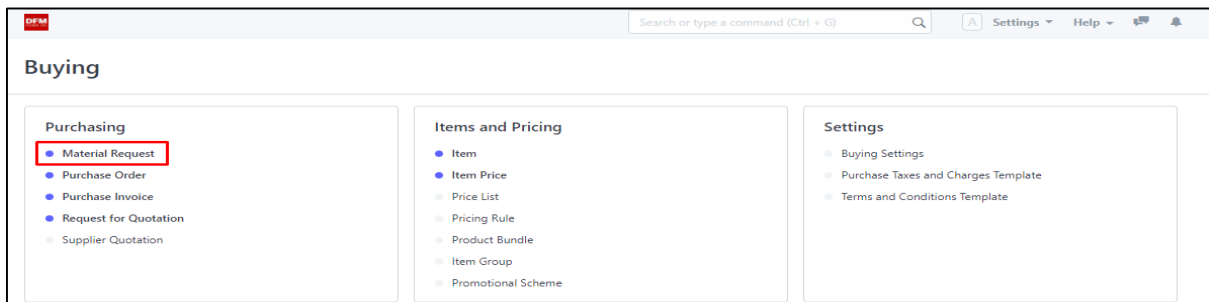


### Material Request Process in Buying Module

- After logging in the ERPNext system below screen will appear for users. Purchase Department users can navigate to their system by clicking on “Buying” Module.



- On clicking “Buying” Module the following screen will appear. By clicking on “Material Request” link request for material purchase can be placed.



DFM > Stock

Search or type a command (Ctrl + G)

Settings Help

## Material Request

Menu Refresh **New**

VIEWS  
Reports  
List  
Kanban

Filter BY  
Assigned To

Name Title Company DFM Foods Ltd- G.Noida Requested For

Add Filter Created On

Title Status Type Company 8 of 8

- User has to click on “New” button for placing material purchase request.

DFM > Stock > Material Request

Search or type a command (Ctrl + G)

Settings Help

## New Material Request 1 • Not Saved

Save

Get items from

Series MR-.abbr.-.YY.- Required Date 02-02-2021

Type Material Issue Material Transfer **Purchase** Manufacture Customer Provided Company

Quantity	UOM	For Warehouse
1		

Add Multiple Add Row Download Upload

- User will select the “Purchase” option under “Type” dropdown.

DFM > Stock > Material Request

Search or type a command (Ctrl + G)

Settings Help

## New Material Request 1 • Not Saved

Save

Get items from

Series MR-.abbr.-.YY.- Required Date 02-02-2021

Type Purchase Company DFM Foods Ltd- G.Noida

Item Code	Item Name	Quantity	UOM	For Warehouse
1	RMPUL00381	Moong Dal	1,500.00K	Kg

Add Multiple Add Row Download Upload

- User should enter “Company’s Name” in order to proceed further.
- User will enter the details of Item required. S/he can enter either Item code or Item Name.
- User will also select “For Warehouse” field to proceed further.
- S/he will press “Save” button in order to save the request.

DFM > Stock > Material Request

Search or type a command (Ctrl + G)

Settings Help

**Purchase Request for Moong Dal** • Draft

MR-DFLG-21-00007

Menu **Submit**

Comments 0

Assigned To Assign +

Attachments Attach File +

Tags Add a tag ...

Reviews +

Shared With +

You edited this

You created this

Submit this document to confirm

DASHBOARD

Related

Request for Quotation

Supplier Quotation

Purchase Order

Stock Entry

Pick List

Manufacturing

Work Order

Type

Purchase

Required Date

02-02-2021

Company

DFM Foods Ltd- G.Noida

Saved

- After clicking Save button above screen will appear wherein the user will press “Submit” button for request generation.

DFM > Stock > Material Request

Search or type a command (Ctrl + G)

Settings Help

**Purchase Request for Moong Dal** • Draft

MR-DFLG-21-00007

Menu Submit

Comments 0

Assigned To Assign +

Attachments Attach File +

Tags Add a tag ...

Reviews +

Shared With +

You edited this

You created this

Submit this document to confirm

DASHBOARD

Related

Request for Quotation

Supplier Quotation

Purchase Order

Stock Entry

Pick List

Manufacturing

Work Order

Type

Purchase

Required Date

02-02-2021

Company

DFM Foods Ltd- G.Noida

Confirm

Permanently Submit MR-DFLG-21-00007?

No Yes

- User will see the above pop-up and click on “Yes” button.

DFM > Stock > Material Request

Search or type a command (Ctrl + G)

Settings Help

**Purchase Request for Moong Dal** • Pending

MR-DFLG-21-00007

Menu Cancel

Comments 0

Assigned To Assign +

Attachments Attach File +

Tags Add a tag ...

Reviews +

Shared With +

You edited this

You created this

Submit this document to confirm

DASHBOARD

Related

Request for Quotation +

Supplier Quotation +

Purchase Order +

Stock Entry

Pick List

Manufacturing

Work Order

Type

Purchase

Required Date

02-02-2021

Company

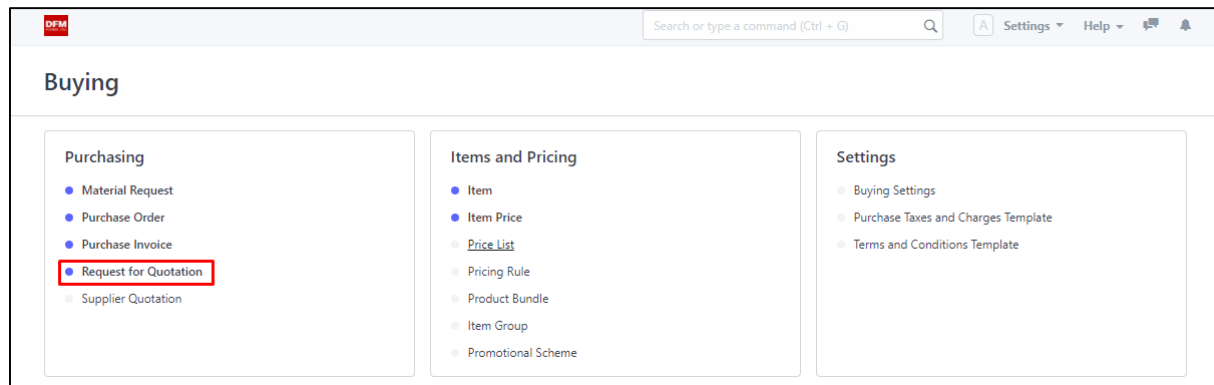
DFM Foods Ltd- G.Noida

Create Stop

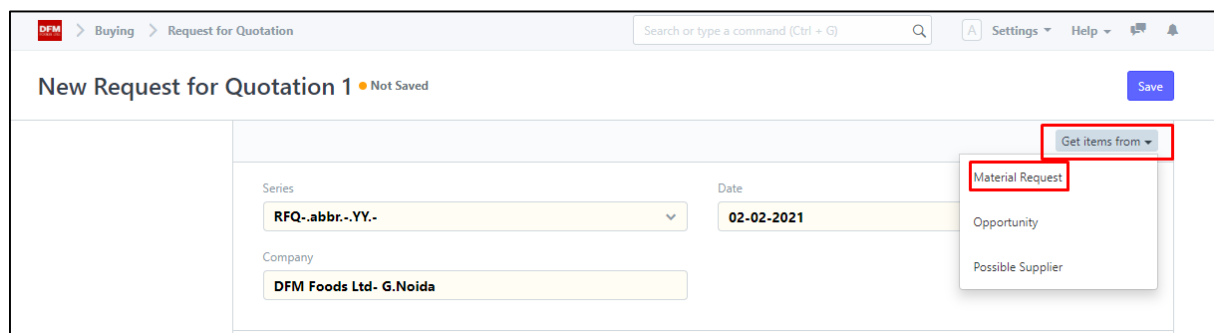
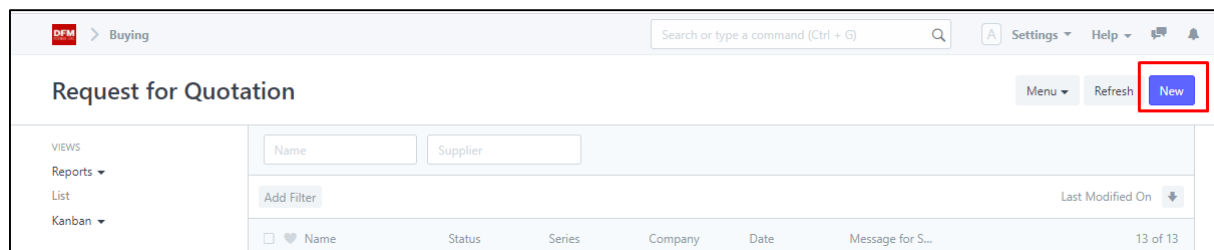
- User can see that the Purchase Request Number has been generated: **MR-DFLG-21-00007**.

## Request for Quotation Process in Buying Module

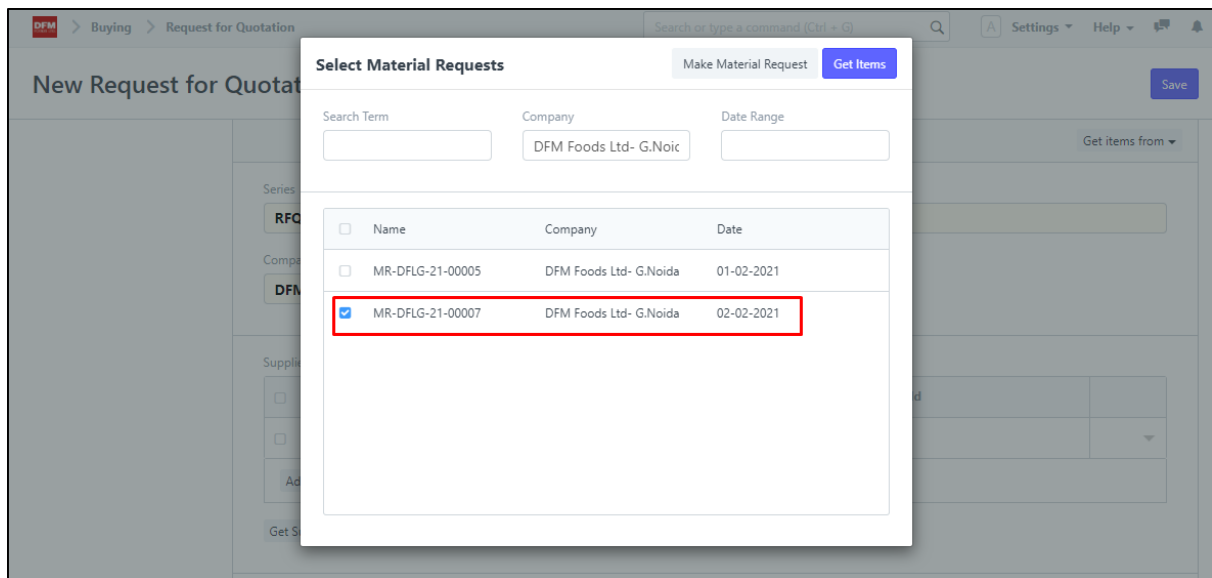
- User of Purchase Department will click on “Request for Quotation” for calling quotations from vendors.



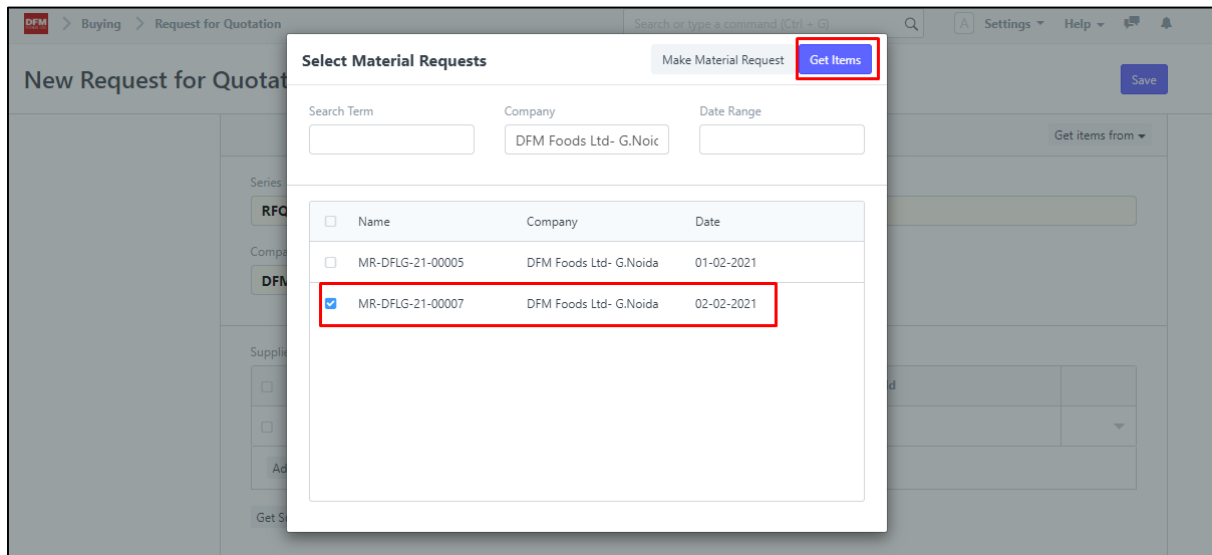
- After selecting “Request for Quotation” button, following screen will appear.
- Then user will click on “New” button for creating vendor’s quotation.



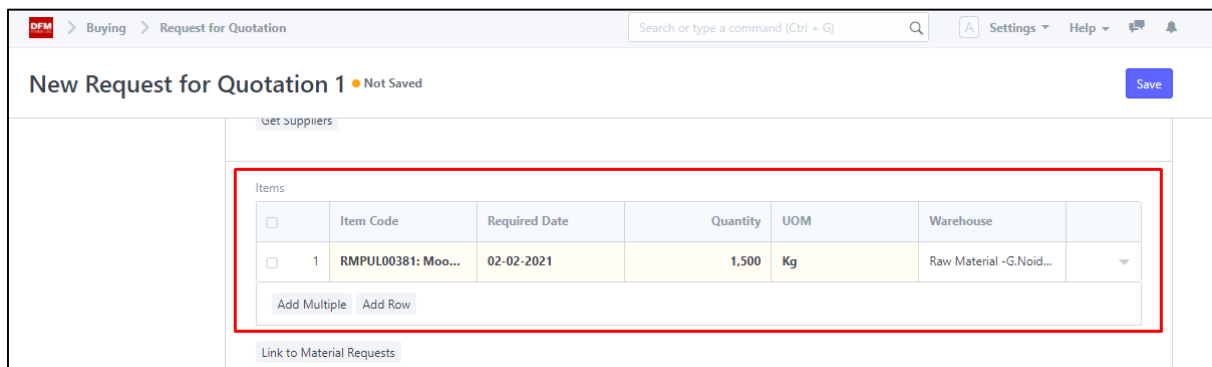
- User can pull the “Material Request” data by clicking on “Get items from” button.
- S/he will click on “Material Request” button to fetch data of material request.



- User can see the open requests in the above screen and can select the required request to fetch data from.



- User will click on “Get Items” button for further processing.



- User can see the items from “Material Request” pre-filled in “Items Table”.

DFM > Buying > Request for Quotation

Search or type a command (Ctrl + G)

Settings Help

## New Request for Quotation 1 Not Saved

Save

Supplier	Contact	Email Id
1 ADANI WILMAR LTD	ADANI WILMAR LTD-1-ADANI WILMA	adani@gmail.com

Add Row

Get Suppliers

- User would have to fill the supplier's details from whom quotation is required.
- On selecting supplier, the details in contact and email id field will automatically get pre-filled.

DFM > Buying > Request for Quotation

Search or type a command (Ctrl + G)

Settings Help

## New Request for Quotation 1 Not Saved

Save

Link to Material Requests

Email Template  
Request For Quotation

Message for Supplier

Please supply the specified items at the best possible rates

- User can add additional message for supplier if s/he needs.
- After performing above steps, user has to click on "Save" button.

DFM > Buying > Request for Quotation

Search or type a command (Ctrl + G)

Settings Help

## RFQ-DFLG-21-00002 Draft

Menu Submit

Comments 0

Assigned To  
Assign +

Attachments  
Attach File +

Tags  
Add a tag ...

Reviews

Shared With

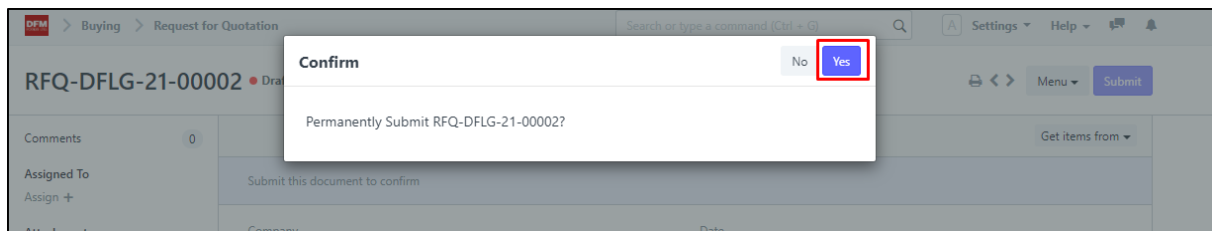
Submit this document to confirm

Company  
DFM Foods Ltd- G.Noida

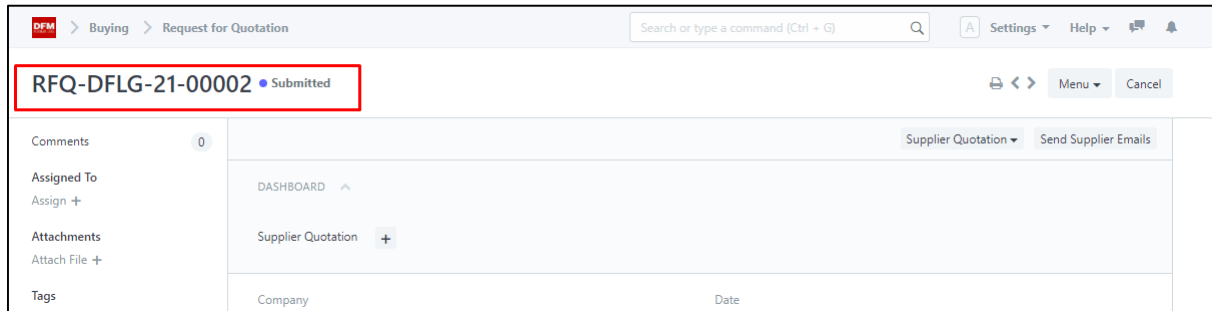
Date  
02-02-2021

Supplier	Contact	Email Id
1 ADANI WILMAR LTD	ADANI WILMAR LTD-1-ADANI WILMA	

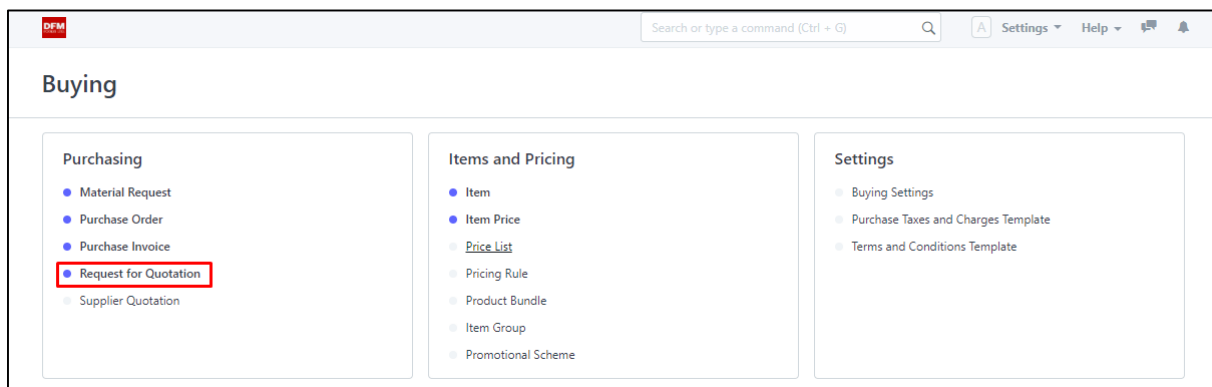
- User can see the status as in "Draft" mode.
- User would have to click on "Submit" button for sending the quotations.



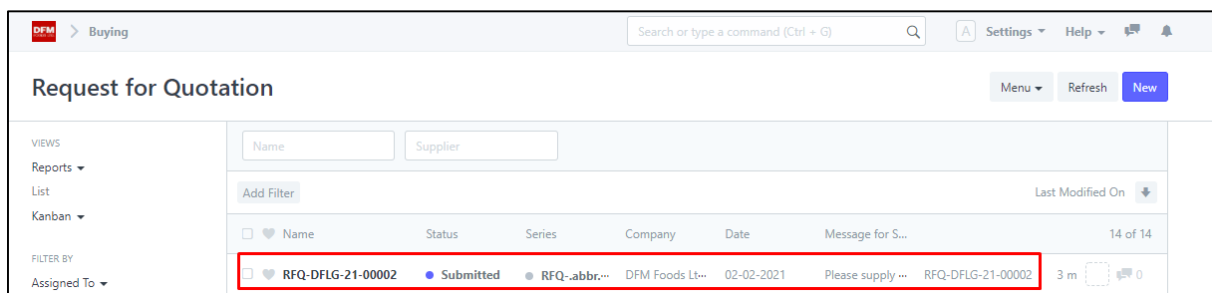
- User will click on “Yes” button in confirmation pop-up.



- User can see that Quotation number is generated and status is changed to “Submitted” from “Draft”. Quotation Number is: **RFQ-DFLG-21-00002**.



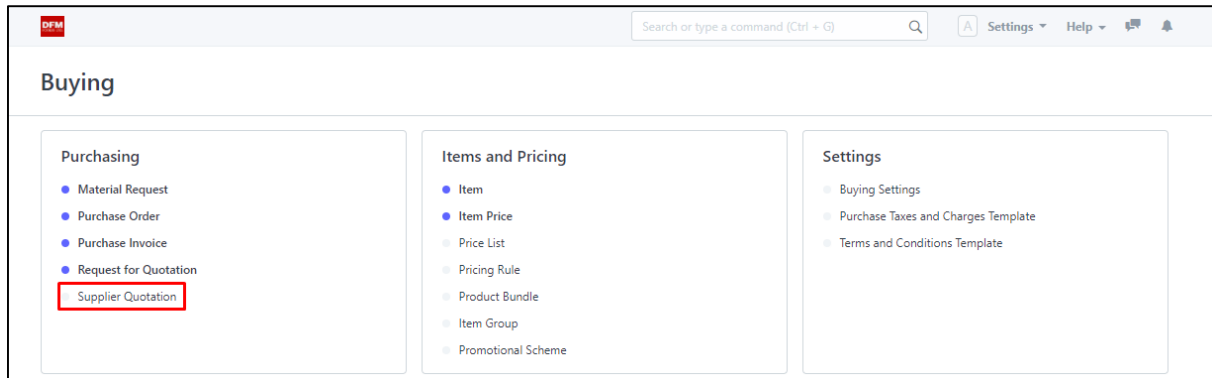
- User can navigate to Request for Quotation screen and can see that request is appearing in “Submitted” mode.



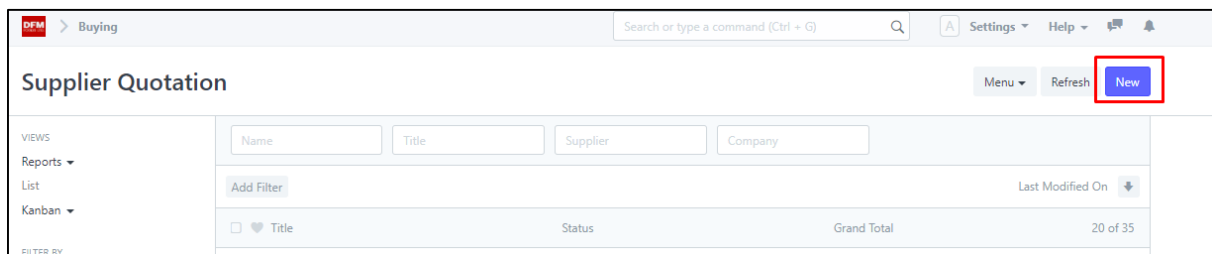


## Supplier's Quotation Process in Buying Module

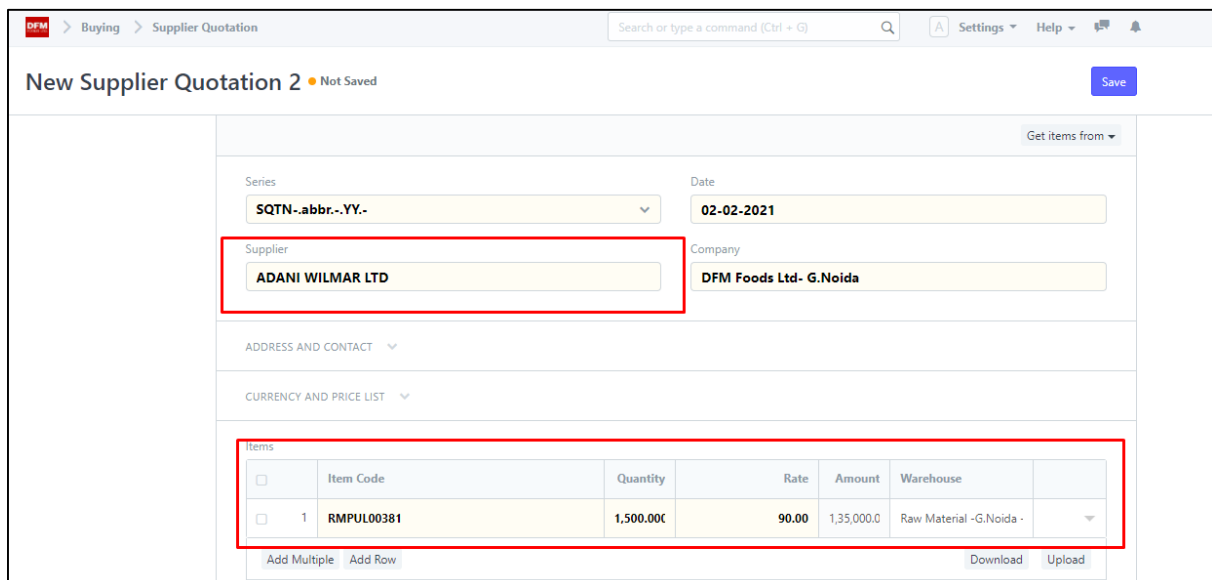
- User can enter the details of quotation received from supplier in “Supplier's Quotation” screen by navigating through buying module.



- User will click on “New” button to enter the details.



- User will enter Supplier's name and the details of Item, Quantity, Rate and Warehouse as per the quotation.



- User will have to select the “Purchase Taxes and Charges Template” based on the supplier's location.

DFM > Buying > Supplier Quotation

Search or type a command (Ctrl + G)

Settings Help

## New Supplier Quotation 2 Not Saved

Save

Purchase Taxes and Charges Template

			Rate	Amount	Total	
<input type="checkbox"/>	4	On Net Total	INPUT CGST - 6% - DF	0	₹ 0.00	₹ 1,35,000.00
<input type="checkbox"/>	5	On Net Total	INPUT SGST - 9% - DF	0	₹ 0.00	₹ 1,35,000.00
<input type="checkbox"/>	6	On Net Total	INPUT CGST - 9% - DF	0	₹ 0.00	₹ 1,35,000.00
<input type="checkbox"/>	7	On Net Total	INPUT SGST - 14% - ...	0	₹ 0.00	₹ 1,35,000.00
<input type="checkbox"/>	8	On Net Total	INPUT CGST - 14% - ...	0	₹ 0.00	₹ 1,35,000.00

Add Row

- User will see the details auto calculated for amount and taxes.
- User will click on “Save” button for further processing.

DFM > Buying > Supplier Quotation

Search or type a command (Ctrl + G)

Settings Help

## New Supplier Quotation 2 Not Saved

Save

Taxes and Charges Added (INR)

₹ 0.00

Taxes and Charges Deducted (INR)

₹ 0.00

taxes\_and\_charges\_deducted

Total Taxes and Charges (INR)

₹ 0.00

Grand Total (INR)

₹ 1,35,000.00

Rounding Adjustment (INR)

₹ 0.00

Rounded Total (INR)

₹ 1,35,000.00

☐ Disable Rounded Total

- After clicking on save following screen will appear and the save request is in draft mode.

DFM > Buying > Supplier Quotation

Search or type a command (Ctrl + G)

Settings Help

ADANI WILMAR LTD Draft

SQTN-DFLG-21-00007

Menu

Submit

Comments 0

Assigned To Assign +

Attachments Attach File +

Tags Add a tag ...

Reviews +

Shared With +

Submit this document to confirm

DASHBOARD

Related

Purchase Order

Quotation

Subscription

Auto Repeat

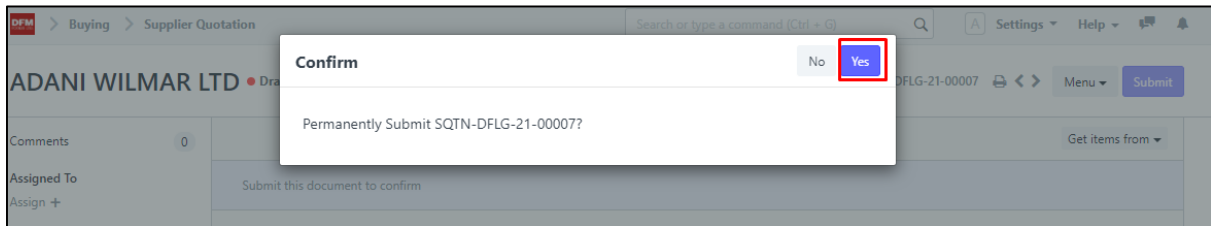
Reference

Material Request

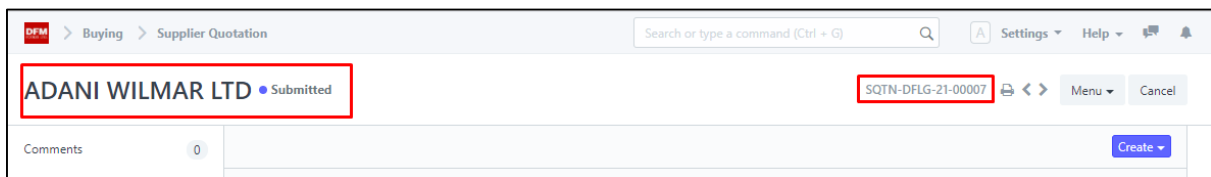
Request for Quotation

Project

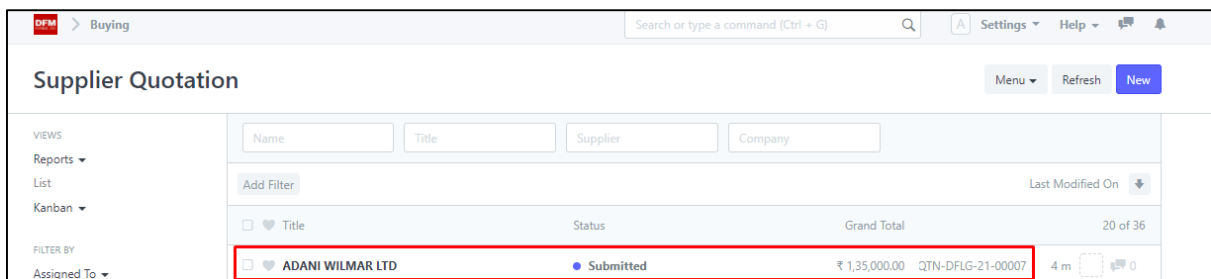
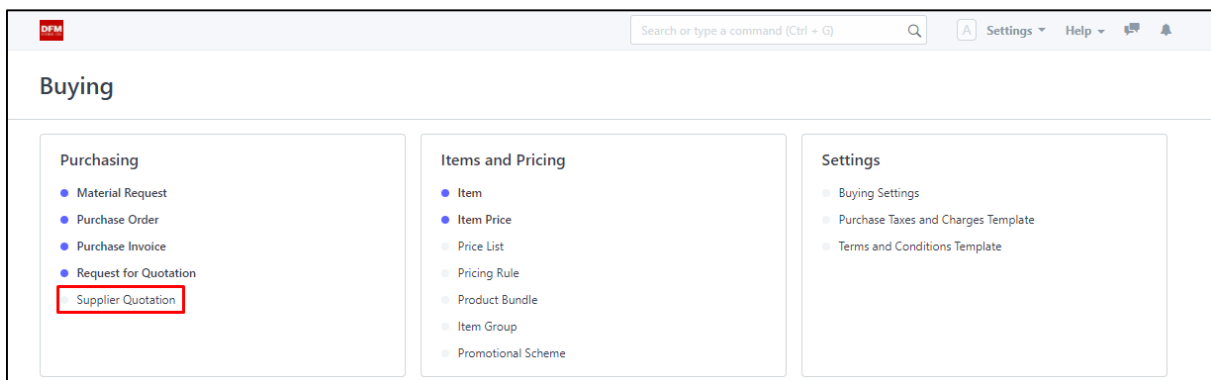
- User will click on “Submit” button and following pop-up will appear and will have to click on “Yes” button for proceeding further.



- User will see the details in submitted mode from draft mode and supplier’s quotation number being generated: **SQTN-DFLG-21-00007**.

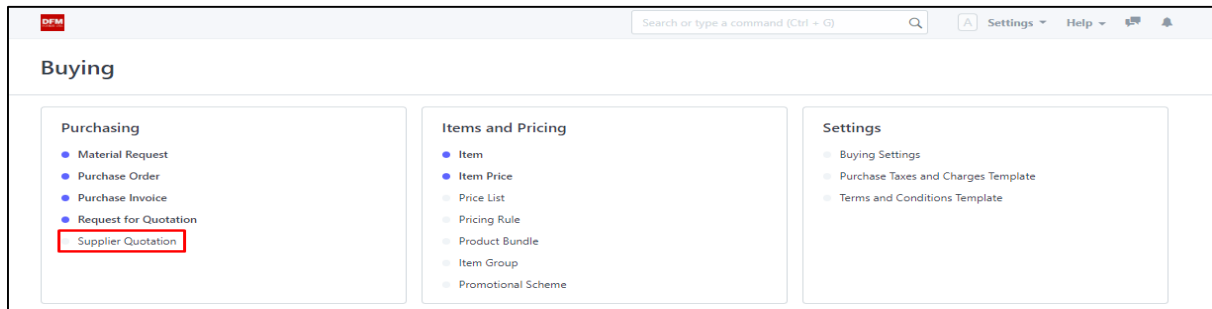


- User can see the details submitted in Supplier Quotation screen.

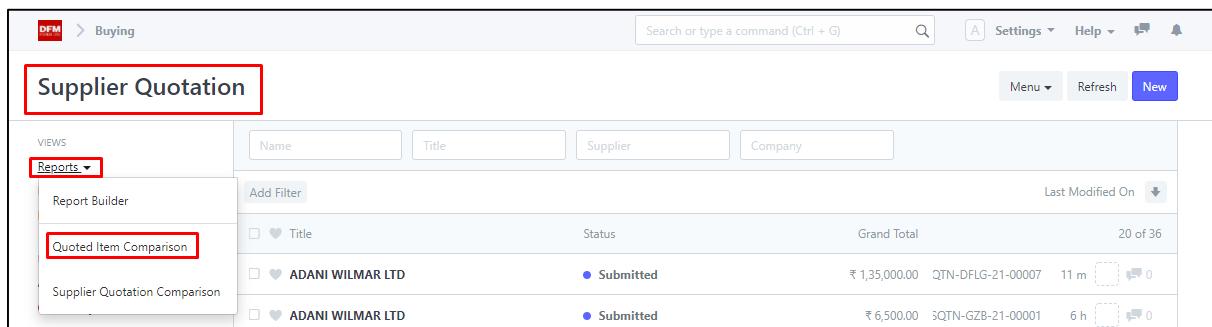


## Supplier's Quotation Comparison through Report Builder

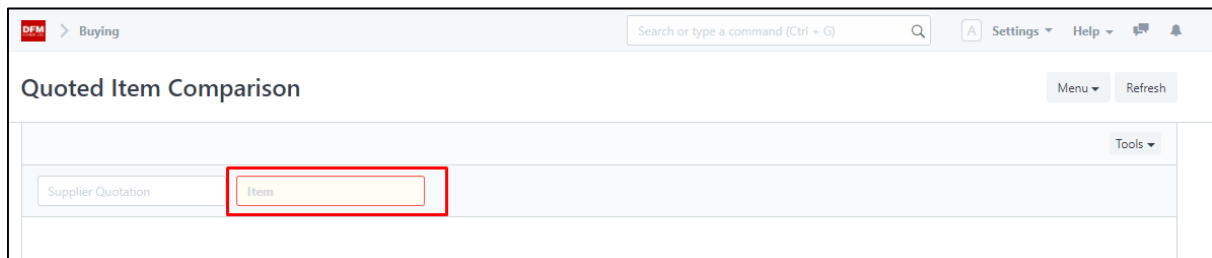
- User can compare the quotations received from supplier for their evaluation.



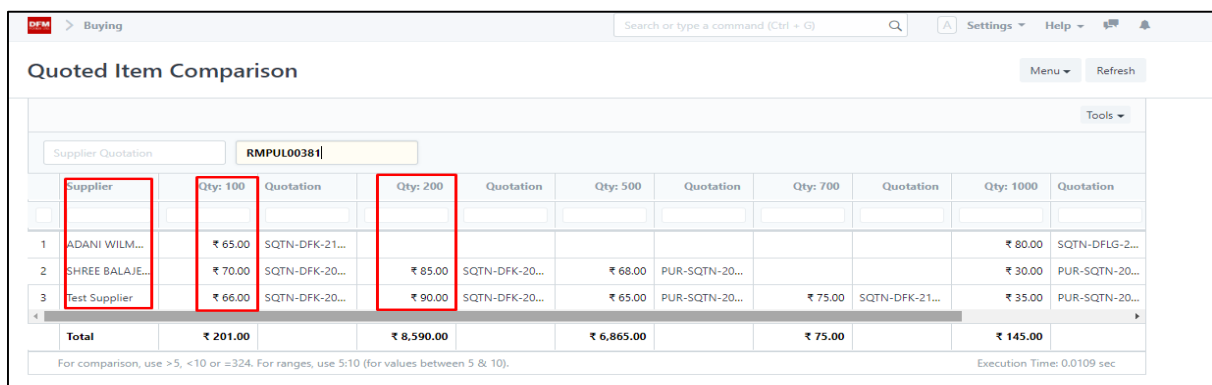
- User will click on "Reports" hyperlink and will see a dropdown for different reports.
- User would have to select the "Quoted Item Comparison" button in order to compare the quotations.



- User will enter the Item details for comparison.

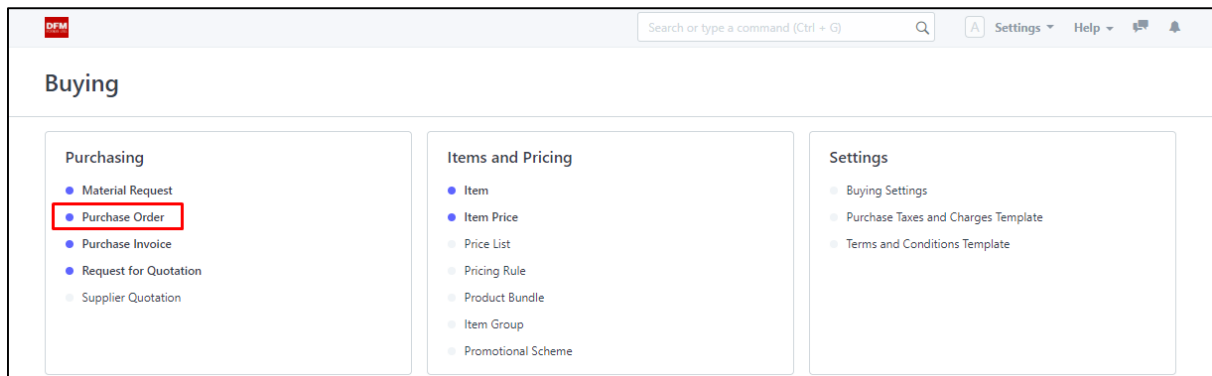


- User can compare the quotation for different levels of quantity with respect to different supplier.

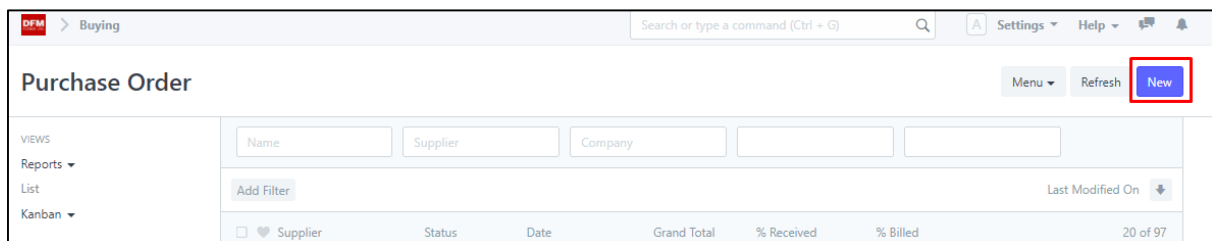


## Purchase Order Process in Buying Module

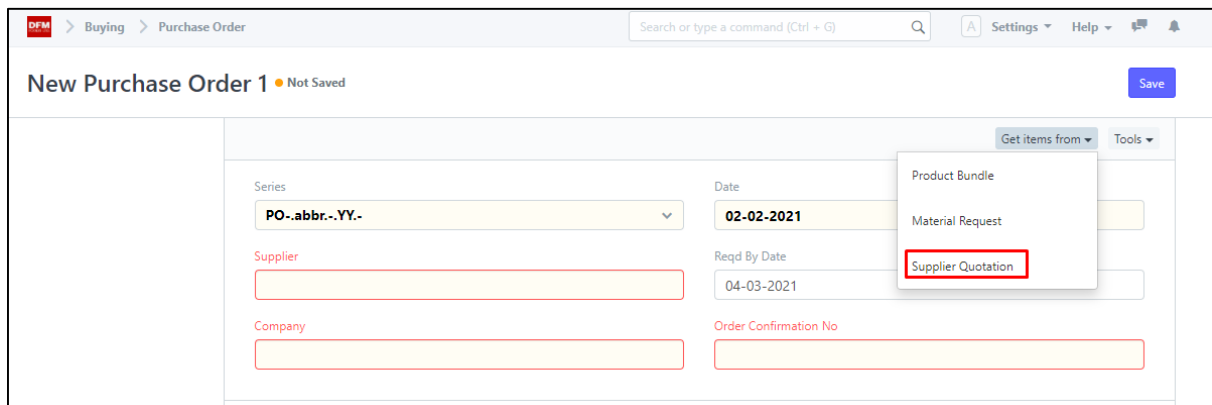
- User can create Purchase Orders (PO) by following process.



- By clicking on “Purchase Order” button user will land on Purchase order screen and from there s/he will click on “New” button.



- User will click on “Get Items from” button and dropdown will appear wherein “Supplier Quotation” option will be selected.



- After doing the above process below screen will appear.

**Select Supplier Quotations**

Search Term: \_\_\_\_\_ Company: \_\_\_\_\_ Date Range: \_\_\_\_\_

Quotation ID	Company	Date
<input type="checkbox"/> SQTN-DFK-21-00007	DFM Foods-Kashipur	28-01-2021
<input type="checkbox"/> SQTN-DFK-21-00006	DFM Foods-Kashipur	28-01-2021
<input type="checkbox"/> SQTN-DFK-21-00005	DFM Foods-Kashipur	28-01-2021
<input type="checkbox"/> SQTN-DFLG-21-00006	DFM Foods Ltd- G.Noida	01-02-2021
<input type="checkbox"/> SQTN-DFLG-21-00005	DFM Foods Ltd- G.Noida	01-02-2021
<input checked="" type="checkbox"/> SQTN-DFLG-21-00007	DFM Foods Ltd- G.Noida	02-02-2021
<input type="checkbox"/> SQTN-GZB-21-00001	DFM Foods Ltd-GZB	02-02-2021

More

Get Items

- User will see all the supplier's quotations received and click on the required quotation for fetching the details. After this click on "Get Items" button.
- User can see that all the details of supplier and items are auto-populated.
- User will enter Order Confirmation No and Order Confirmation Date.

**ADANI WILMAR LTD** Not Saved

Series: PO-.abbr.-YY- Date: 02-02-2021

Supplier: ADANI WILMAR LTD

Company: DFM Foods Ltd- G.Noida

Reqd By Date: 04-03-2021

Order Confirmation No: \_\_\_\_\_

Email: \_\_\_\_\_

Order Confirmation Date: 02-02-2021

**ADANI WILMAR LTD** Not Saved

CURRENCY AND PRICE LIST

Item Code	Item Name	Quantity	Stock ...	Rate	Amount
1 RMPUL00381: Mo...	Moong Dal	1,500	Kg	₹ 90.00	₹ 1,35,000.00

Add Multiple Add Row

Total Quantity: 1,500

Total Net Weight: 0

Total (INR): ₹ 1,35,000.00

DFM > Buying > Purchase Order

Search or type a command (Ctrl + G)

Settings Help

ADANI WILMAR LTD • Not Saved Save

Remarks	Taxes and Charges Added (INR) ₹ 0.00 Taxes and Charges Deducted (INR) ₹ 0.00 Total Taxes and Charges (INR) ₹ 0.00 total_taxes_and_charges
	Grand Total (INR) ₹ 1,35,000.00 Rounding Adjustment (INR) ₹ 0.00 Rounded Total (INR) ₹ 1,35,000.00 <input type="checkbox"/> Disable Rounded Total

- After this user will click on “Save” button.

DFM > Buying > Purchase Order

Search or type a command (Ctrl + G)

Settings Help

ADANI WILMAR LTD • Not Saved Save

Get items from Tools

Series	Date
PO-.abbr.-.YY.-	02-02-2021
Supplier	Reqd By Date
ADANI WILMAR LTD	04-03-2021
Company	Order Confirmation No
DFM Foods Ltd- G.Noida	Email
	Order Confirmation Date
	02-02-2021

- After clicking on Save button below screen will appear where the PO will be in “Pending for Approval” status.

DFM > Buying > Purchase Order

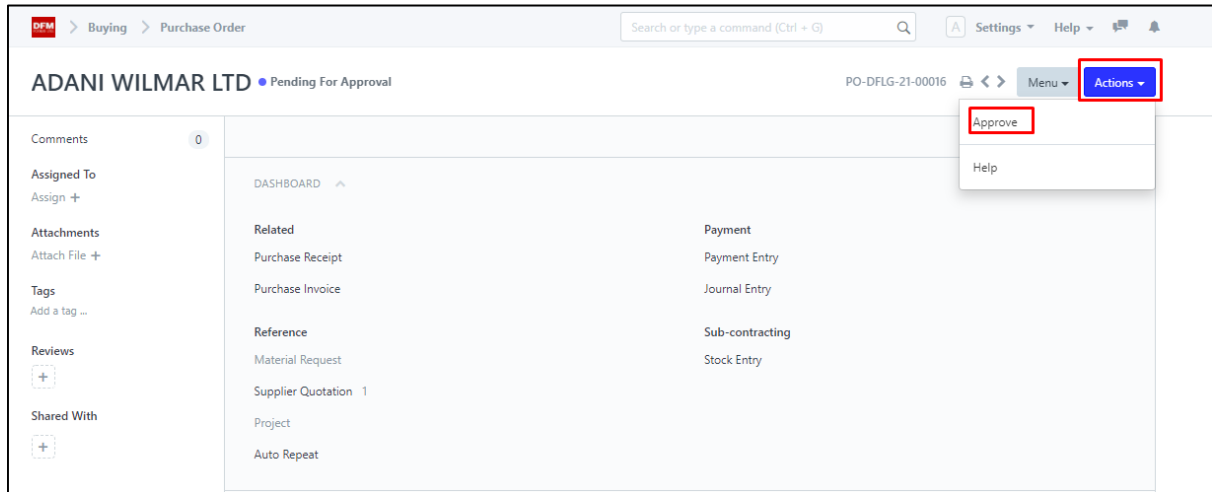
Search or type a command (Ctrl + G)

Settings Help

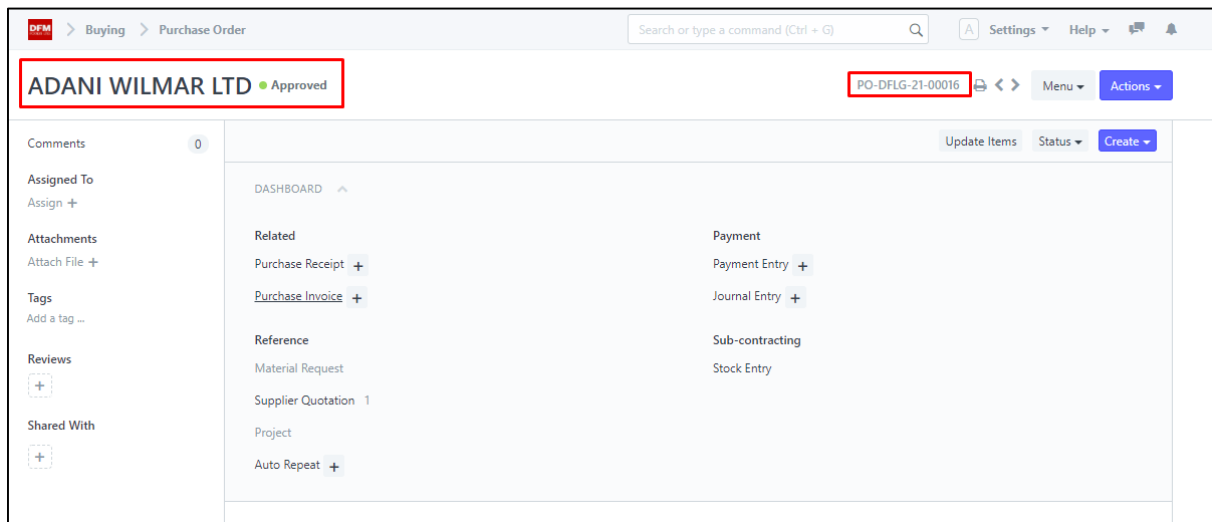
ADANI WILMAR LTD • Pending For Approval PO-DFLG-ZI-00016 Menu Actions

Comments 0 Assigned To Assign + Attachments Attach File + Tags Add a tag ... Reviews + Shared With +	DASHBOARD Related Purchase Receipt Purchase Invoice Reference Material Request Supplier Quotation 1 Project Auto Repeat Payment Payment Entry Journal Entry Sub-contracting Stock Entry
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- User will click on “Actions” button and approve the PO request.



- On clicking “Approve” button, PO request will get **approved**. PO no. is: **PO-DFLG-21-00016**.



- User can see the PO created in Purchase Order screen.

