eVarsity®

Purchase Module

User Manual

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CONTENTS

I. Introduction

Preface

The Purchase process across many organizations continues to be the traditional, paper based, labor intensive practice of procurement, invoice processing, routing and approvals making it a highly inefficient and cumbersome process.

The lack of an automated solution results in inefficiencies and delays in purchase requisition, purchase order placement and delays in payment processing. Numerous hand offs and approval processes reduce productivity across the organization. A prolonged cycle time also implies higher associated risks and costs. Request for Quotation and bidding/negotiation process steps have not yet been automated in many companies.

E-Varsity enhances efficiency and streamlines processes through hi-end automation. Configurable workflow as per client needs once configured, the process is frozen and employees have to rigidly comply with the process.

II Purchase Master

1. Unit Of Measurement (UOM) Class

1.1. Intended Audience

System administrator.

1.2. Usage

This centralized master interface records unit of measurement class common for all the institutions.

1.3. Menu Access

Main Menu >> Purchase Masters >> UOM Class.

1.4. Dependency

none

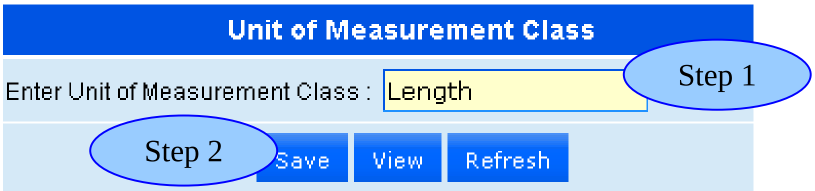


Figure 1.1

1.5. To make a **new entry** follow these steps,

Step1: *enter unit of measurement class required to create.*

Step2: *click "save" button to complete unit of measurement class creation.*

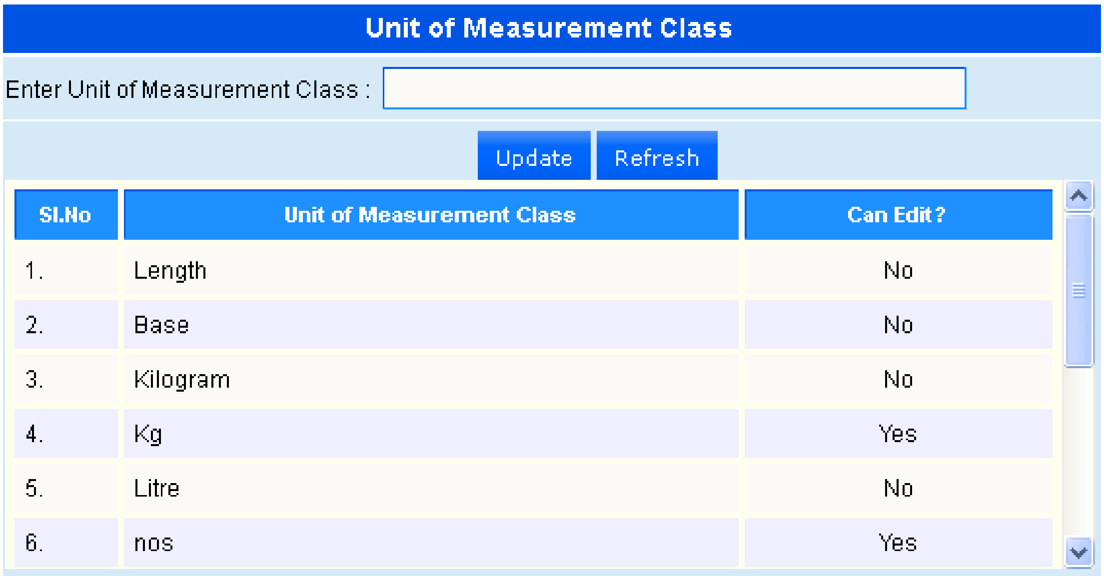
1.6. To **view and modify** existing UOM Class follow these steps

Step1: *Click "View" button, page would load with all unit of measurement class as shown in figure 1.2.*

Step2: Select the UOM class to be modified. We can able to modify only if it can able to edit.

Step3: Modify the UOM class.

Step4: Click on the button "Update" to save the modified UOM class name.



Sl.No	Unit of Measurement Class	Can Edit?
1.	Length	No
2.	Base	No
3.	Kilogram	No
4.	Kg	Yes
5.	Litre	No
6.	nos	Yes

Figure 1.2

2. Unit Of Measurement (UOM)

2.1. Intended Audience

System administrator.

2.2. Usage

This centralized master interface records unit of measurement common for all the institutions.

2.3. Menu Access

Main Menu >> Purchase Masters >> UOM.

2.4. Dependency

UOM Class

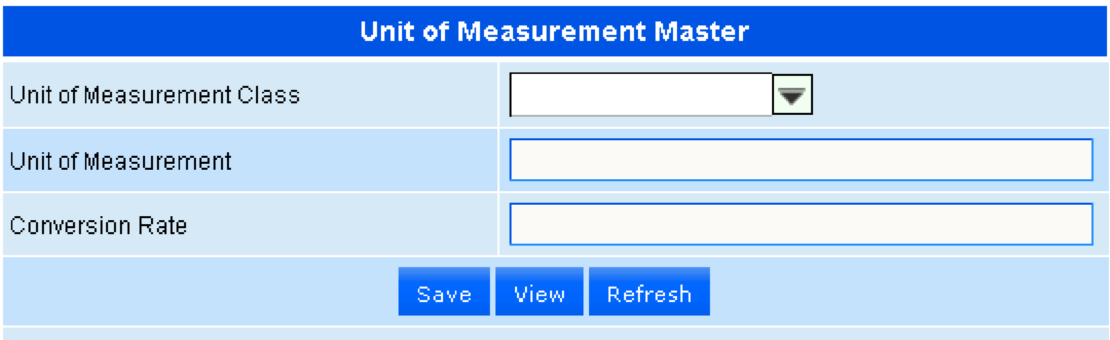


Figure 2.1

2.5. To make a **new entry** follow these steps,

Step1: *select unit of measurement class.*

Step2: *enter the unit of measurement name.*

Step3: *enter conversion rate.*

Step4: *click "save" button to complete unit of measurement entry.*

2.6. To **view** existing unit of measurement these steps

Step1: *click "view" button, page would load with all unit of measurements. as shown in figure 2.2.*

Step2: *click "Back" button, initial page would load are shown in figure 2.1.*

Sl.No.	Unit of Measurement Class	Unit of Measurement	Conversion Rate	Can Edit ?
1.	Roll	1	1.00000	No
2.	Kg	Bag	2.00000	No
3.	Book	Book	1.00000	No
4.	Box	Box	1.00000	No
5.	Bundle	Bundles	1.00000	No

Figure 2.2

2.7. To **modify** existing unit of measurement follow these steps.

Step1: *click "view/Modify" button.*

Step2: *page would load with all unit of measurement available as shown in figure 2.2.*

Step3: *click a unit of measurement in list to select it for modification.*

Step4: *modify required fields to be modified.*

Step5: *click "modify" button to complete unit of measurement modification.*

3. Tax Master

3.1. Intended Audience

System administrator.

3.2. Usage

This centralized master interface records tax common for all the institutions.

3.3. Menu Access

Main Menu >> Purchase Masters >> Tax Master.

3.4. Dependency

None

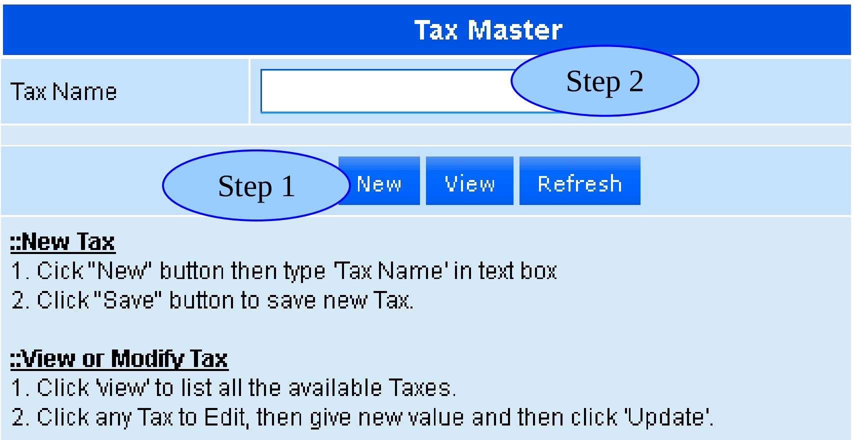


Figure 3.1

3.5. To make a **new entry** follow these steps,

Step1: *Click on the button "New" to be created tax newly.*

Step2: *enter tax name required to create.*

Step2: *click "save" button to complete tax entry.*

3.6. To **view and modify the** existing tax follow these steps

Step1: *click "view" button, page would load with all tax as shown in figure 3.2.*

Step2: *Select the tax to be modified.*

Step3: Modify the tax.

Step4: Click on the button "Update" to save the modified tax.

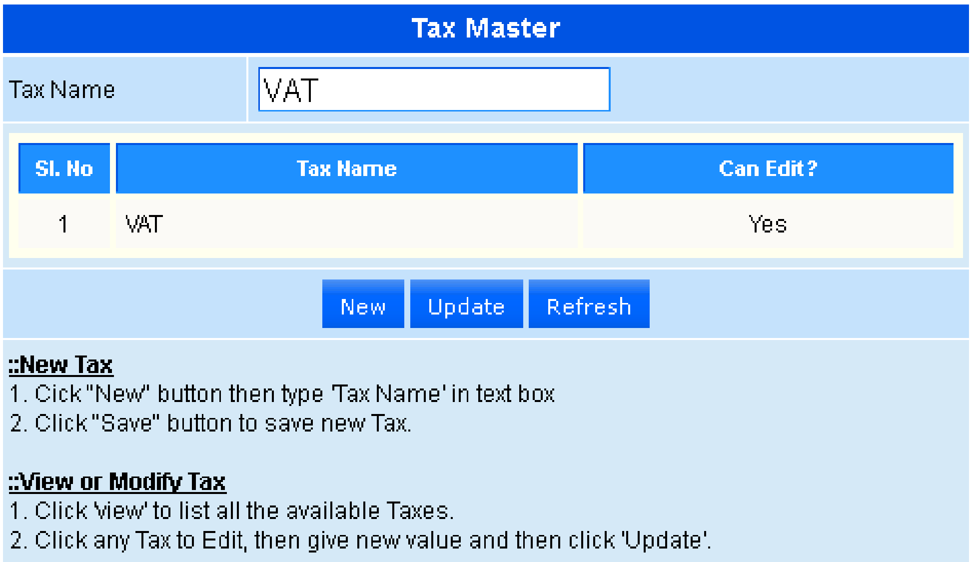


Figure 3.2

4. Division Type Master

4.1. Intended Audience

System administrator.

4.2. Usage

This centralized master interface records tax common for all the institutions.

4.3. Menu Access

Main Menu >> Purchase Masters >> Division Type Master.

4.4. Dependency

None

4.5. To make a **new entry** follow these steps,

Step1: *enter division type name required to create.*

Step2: *click "save" button to complete division name.*

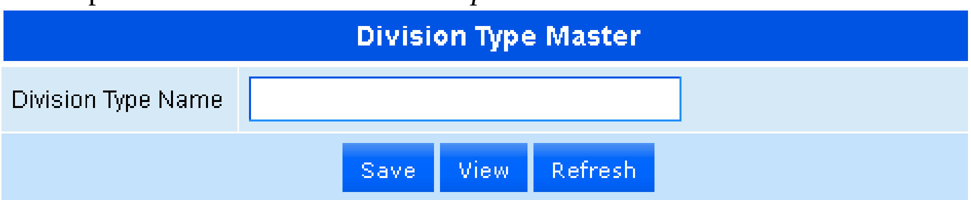


Figure 4.1

4.6. To **view/modify** existing division types follow these steps

Step1: *click "view" button, page would load with all division type name as shown in figure 4.2.*

Step2: *Select the division type to be modified.*

Step3: *Modify the division type name.*

Step4: *Click on the button "Update" to save the modified division type name.*

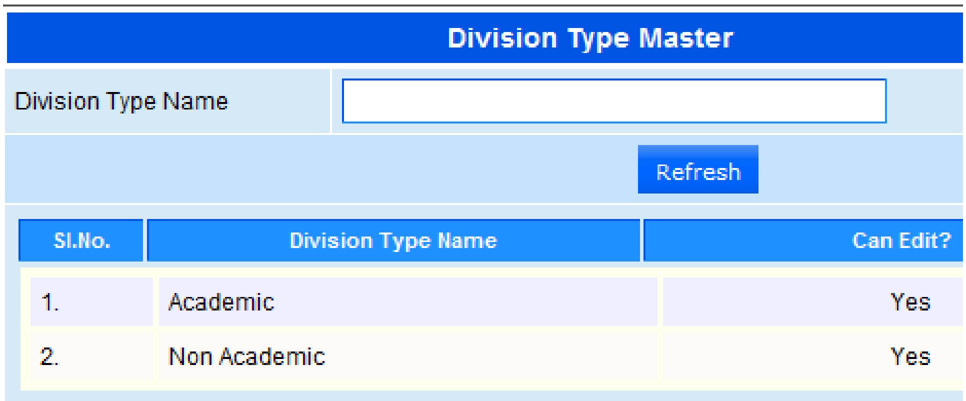


Figure 4.2

5. Division Master

5.1. Intended Audience

System administrator.

5.2. Usage

This centralized master interface records tax common for all the institutions.

5.3. Menu Access

Main Menu >> Purchase Masters >> Division Master.

5.4. Dependency

None

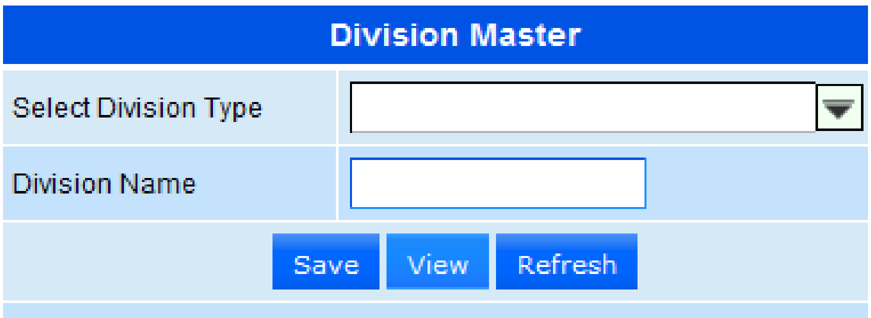


Figure 5.1

5.5. To make a **new entry** follow these steps,

Step1: *select division type*

Step2: *enter division name.*

Step3: *click "save" button to save the division name.*

5.6. To **view/modify** existing division follow these steps

Step1: *click "view" button, page would load with all division name as shown in figure 5.2.*

Step2: *Select division name to be modified.*

Step3: *Modify the division name.*

Step4: *Click on the button "Update" to update the division name.*

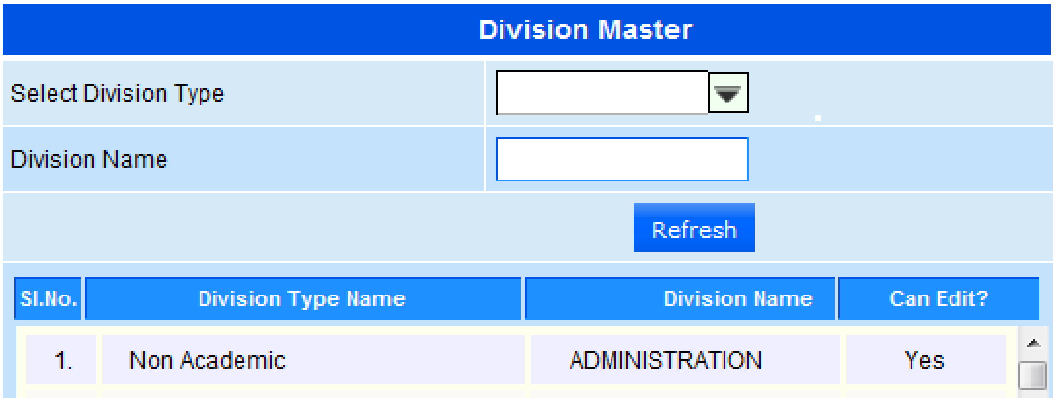


Figure 5.2

6. Product Type Master

6.1. Intended Audience

System administrator.

6.2. Usage

This centralized master interface records product type classification common for all the institutions.

6.3. Menu Access

Main Menu >> Purchase Masters >> Product Type Master.

6.4. Dependency

None

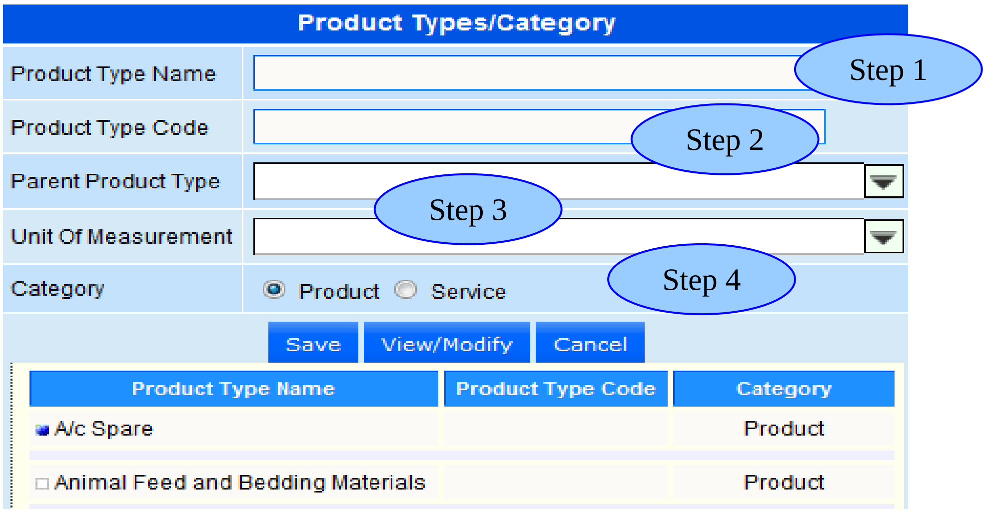


Figure 6.1.

6.5. To make a **new entry** follow these steps,

Step1: *enter product type name required to create.*

Step2: *enter the product type code (if any) available.*

Step3: if required, select parent product type under which new product type is to be created.

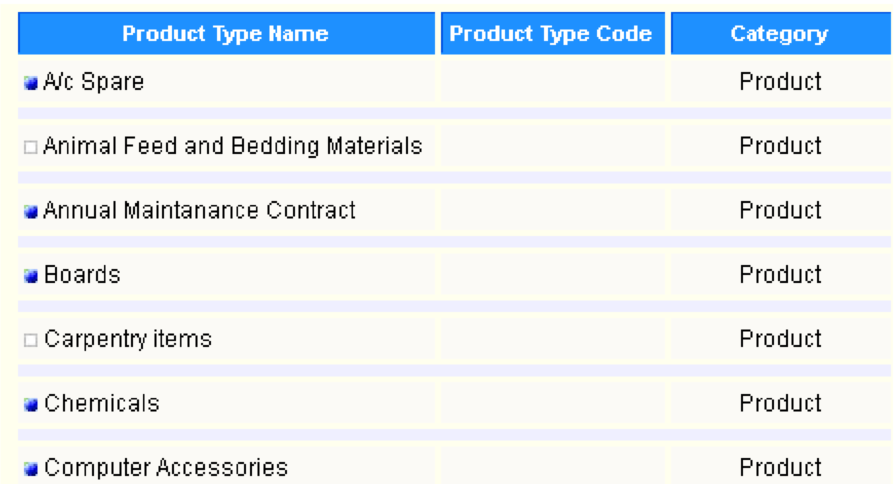
Step4: if required, select unit of measurement for the entered product type.

Step5: *select appropriate account head under which product type to be created.*

Step6: *click "save" button to complete product type entry.*

6.6. To **view** existing product types follow these steps

Step1: *click "view" button, list would appear with all product type as shown in figure 6.2.*



Product Type Name	Product Type Code	Category
A/c Spare		Product
Animal Feed and Bedding Materials		Product
Annual Maintanance Contract		Product
Boards		Product
Carpentry items		Product
Chemicals		Product
Computer Accessories		Product

Figure 6.2

6.7. To **modify** existing product type follow these steps.

Step1: *click "view" button.*

Step2: *a list would appear will all product type available as shown in figure 6.2.*

Step3: *click a product type in list to select it for modification.*

Step4: *modify required fields to be modified.*

Step5: *click "modify" button to complete product type modification.*

7. Product Master

7.1. Intended Audience

Purchase Requestor and System Administrator.

7.2. Usage

This interface enables users to create new product into e-Varsity.

7.3. Menu Access

Main Menu >> Purchase Masters >> Product Master.

7.4. Dependency

Product Type Master, Unit of Measurement

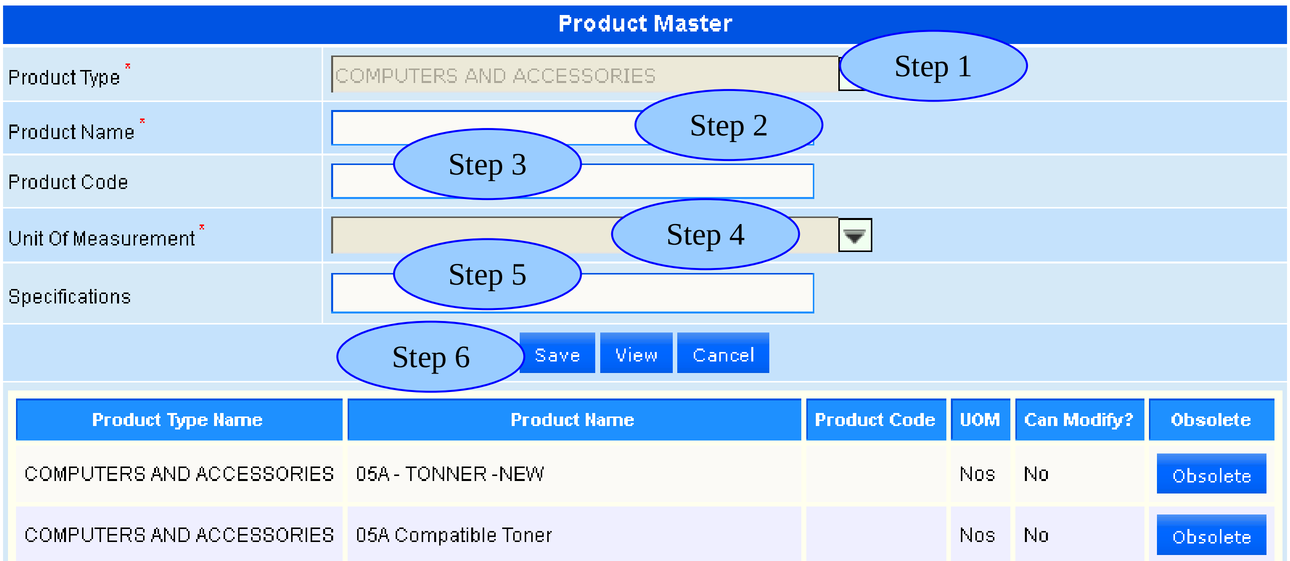


Figure 7.1

7.5. To make a **new entry** follow these steps,

Step1: *select product type from the drop-down list.*

Step2: *enter product name to be created.*

Step3: if any, enter product code.

Step4: *select unit of measure for the product.*

Step5: if any, enter specifications for the product.

Step6: *click "save" button to complete product master entry.*

7.6. To **view** existing products follow these steps

Step1: *select a product type from product type.*

Step2: *click "view" button, list would appear with products available under selected product type as shown in figure 7.1.*

7.7. To **modify** existing product types follow these steps

Step1: *select a product type from product type list.*

Step2: *click "view" button.*

Step3: *a list would appear will all products available under selected product type as shown in figure 7.1.*

Step4: *click a product in list to select it for modification.*

Step5: *modify required fields to be modified.*

Step6: *click "modify" button to complete product modification.*

7.8. To **obsolete** the selected product follow these steps,

Step1: Click on the button "Obsolete" to obsolete the selected product. After completed this entry, it will not be shown in the interface purchase request.

8. Office-wise Products

8.1. Intended Audience

Purchase Requestor and System Administrator.

8.2. Usage

This interface enables users to create link between product and office and product and accounts to user who access to respective offices. Only products linked with offices would be listed in all purchase flow i.e. purchase requisition, stock list etc.

8.3. Menu Access

Main Menu >> Purchase Masters>>Product Masters >> Office wise Products and Product Accounts Linkage

8.4. Dependency

Product Master, office wise account sub heads and asset prefix.

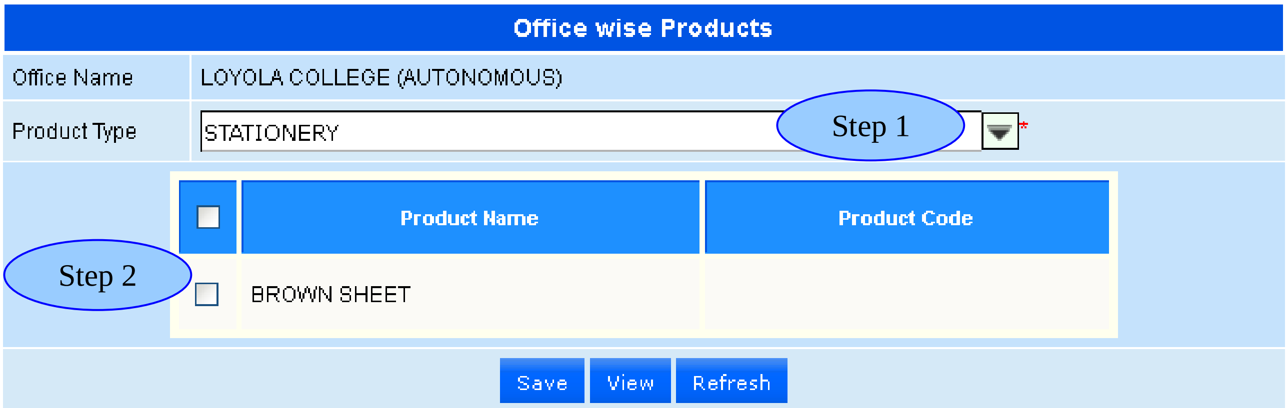


Figure 8.1.

8.5. To make a **new entry** follow these steps,

Step1: *select product type in which products to be linked is available.*

Step2: *select product(s) to be linked with office.*

Step3: *click "save" button to complete link of product to office.*

8.6. To **view** existing office wise products follow these steps

Step1: *click "view" button, list would appear with available products linked to the login office as shown in figure 8.2.*

Sl. No	Product Name	Product Code
1	10 x 12 x 1 – 60GSM COMPUTER SHEET	
2	10 x 12 x 1 – 70GSM COMPUTER SHEET	
3	10 x 12 x 1 – 80GSM COMPUTER SHEET	
4	10 x 12 x 2 – 60GSM COMPUTER SHEET	
5	101/2 x 41/2 BROWN COVER	

Figure 8.2.

8.7. To link the products with accounts follow these steps in the below as in the figure 8.3.

Step 1: *Select the product type*

Step 2: *Select the products to be linked.*

Step 3: *Select the product category*

Step4: *If select the product category as asset, then selects the asset prefix.*

Step5: *Select the account head.*

Step6: *Select the account sub head to be linked the selected products.*

Step7: *Click on the "Save" button save the details.*

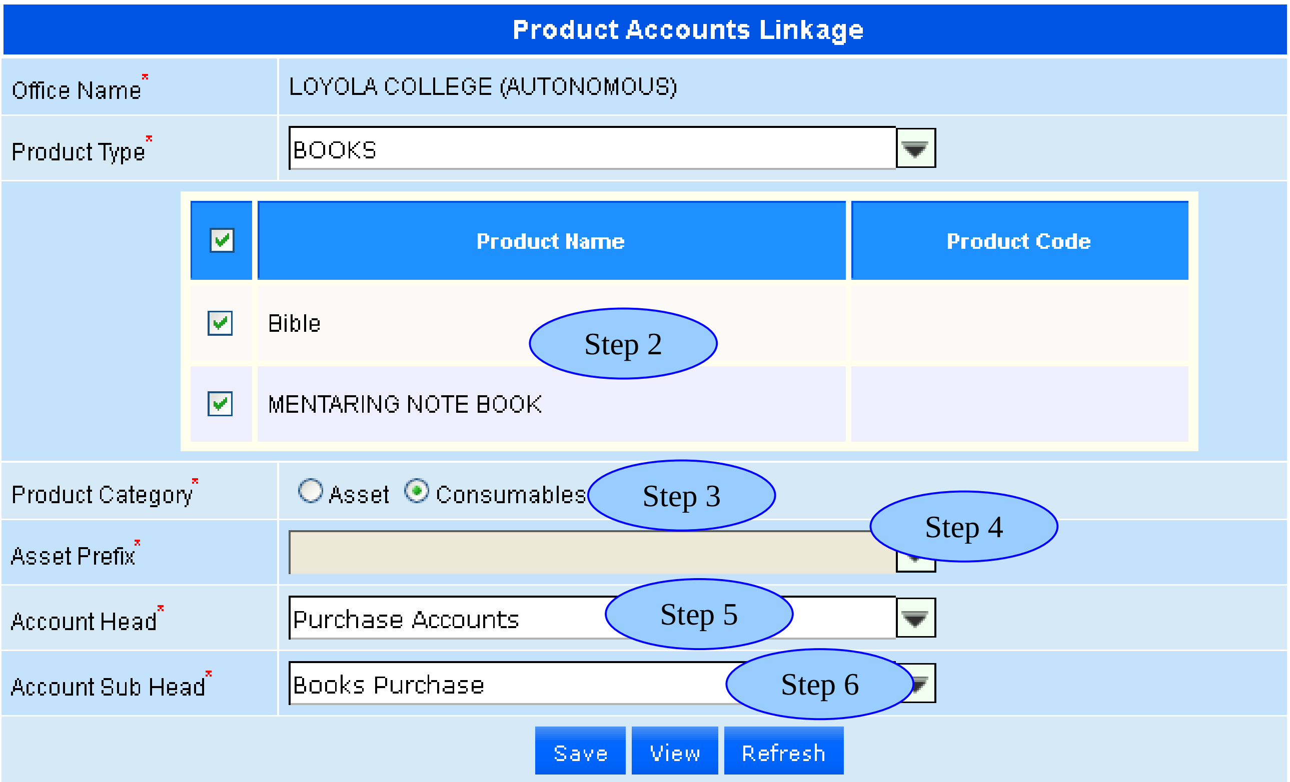


Figure 8.3.

8.8. To **modify** products Accounts Linkage follow these steps

Step1: *Click on "view" button, list would appear with available products linked to the login office as shown in figure 8.4.*

Step2: *click "Modify" button to edit product account linkage product details as in the figure 8.5.*

Step3: *select appropriate product category for the product to be updated.*

Step4: *select appropriate account head for the product to be updated.*

Step5: *select appropriate account sub head the product to be updated.*

Step6: *select appropriate asset prefix name, if product category is asset.*

Step7: *click "save" button to complete office wise product modifications.*

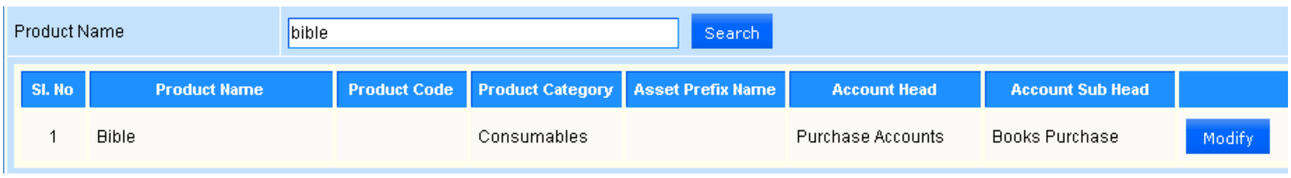


Figure 8.4.

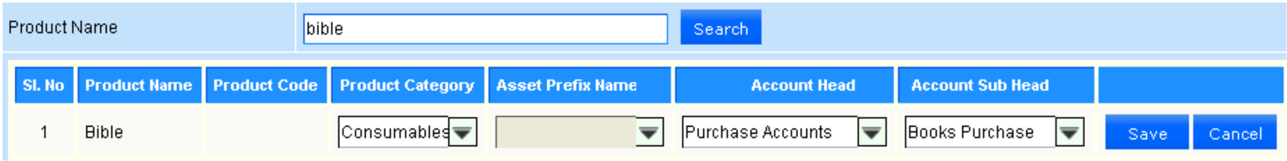


Figure 8.5.

9. Supplier Master (Client Master)

9.1. Intended Audience

Purchase Manager and System Administrator.

9.2. Usage

This interface enables users to create new supplier and account sub head into e-Varsity.

9.3. Menu Access

Main Menu >> Purchase Masters >> Supplier Master.

9.4. Dependency

None.

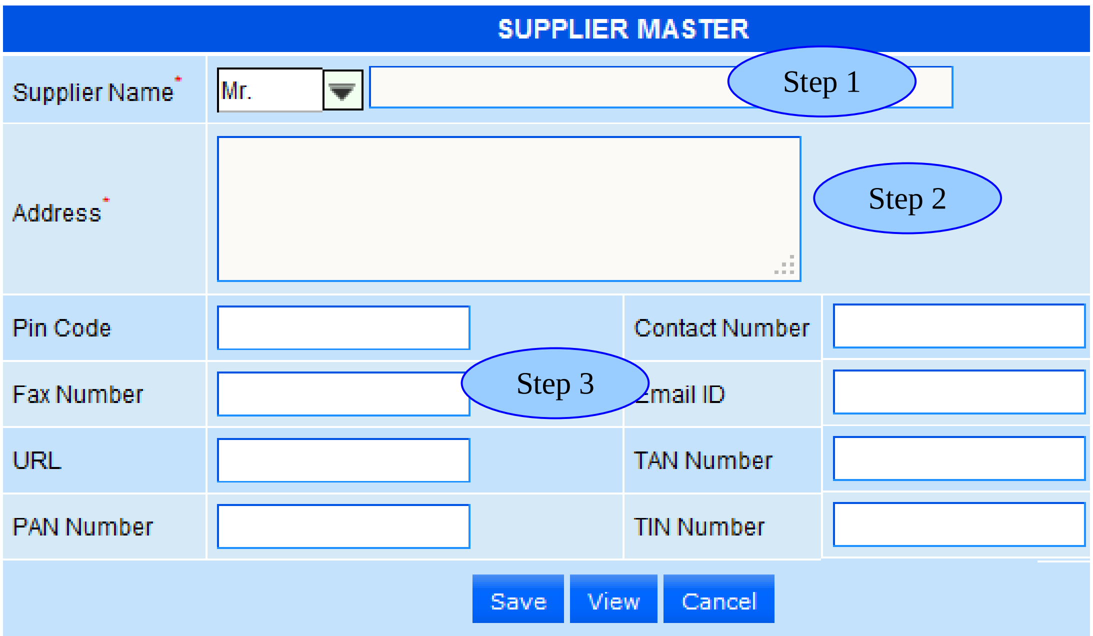


Figure 9.1

9.5. To make a **new entry** follow these steps,

Step1: Select the salutation and *enter the supplier first name.*

Step2: Enter the address of the supplier.

Step3: Enter pin code, contact number, fax number, email id, URL, TAN number, PAN number and TIN number.

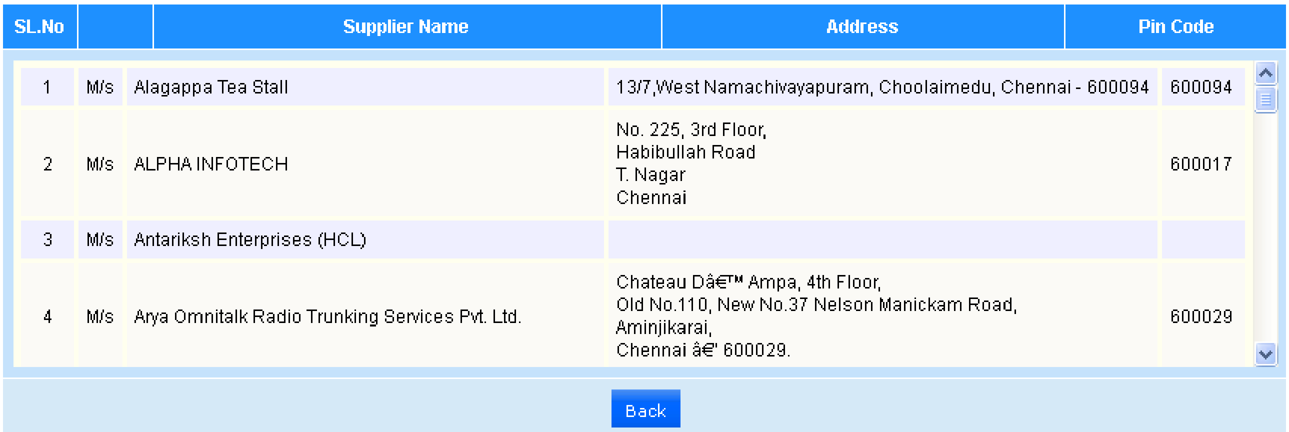
Step4: *click "save" button to complete supplier master entry.*

9.6. To **view/modify the** existing suppliers follow these steps

Step1: *click "view/modify" button, new interface would appear as shown in figure 9.2.*

Step2*: Select the supplier to modify the details as in the figure 9.3. And then follow the step 9.5. Then click the button "Modify" to save the supplier details.*

Step3: *click "Back" button, initial page would load are shown in figure 9.1.*



SL.No		Supplier Name	Address	Pin Code
1	M/s	Alagappa Tea Stall	13/7,West Namachivayapuram, Choolaimedu, Chennai - 600094	600094
2	M/s	ALPHA INFOTECH	No. 225, 3rd Floor, Habibullah Road T. Nagar Chennai	600017
3	M/s	Antariksh Enterprises (HCL)		
4	M/s	Arya Omnitalk Radio Trunking Services Pvt. Ltd.	Chateau Dâ€™ Ampa, 4th Floor, Old No.110, New No.37 Nelson Manickam Road, Aminjikarai, Chennai â€' 600029.	600029

Figure 9.2

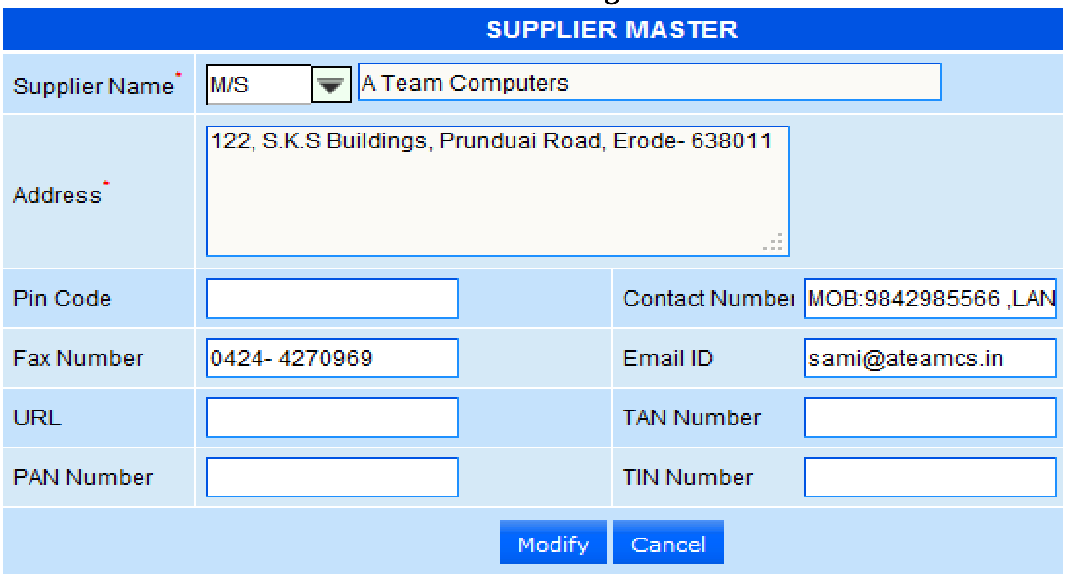


Figure 9.3

10. Office-wise Suppliers

10.1. Intended Audience

Purchase Manager and System Administrator.

10.2. Usage

This interface enables users to create link between supplier and office. Only suppliers linked with offices would be listed in all purchase flow i.e. quotation received, purchase order etc.

10.3. Menu Access

Main Menu >> Purchase Masters >> Office wise Suppliers.

10.4. Dependency

Supplier Master and office wise account sub heads.

Figure 10.1

10.5. To make a **new entry** follow these steps,

Step1: *select supplier(s) to be linked with login office.*

Step2: *click "save" button to complete link of supplier to office.*

10.6. To **view** existing office wise suppliers follow these steps

Step1: *click "view" button, list would appear with available suppliers linked to login office as shown in figure 10.2.*

SL.No.	Supplier Name
1	Alagappa Tea Stall
2	Antariksh Enterprises (HCL)
3	Arya Omnitalk Radio Trunking Services Pvt. Ltd.
4	B.GANDHI Interior Work
5	CALLIDAI MOTOR WORKS
6	ELECRTICALS N ELECTRICALS
7	FUTURE BUSINESSTECH INDIA PVT LTD
8	Houtham Spray Painting

Back

Figure 10.2

11. Supplier Accounts Linkage

11.1 Intended Audience

Purchase Manager and System Administrator.

11.2 Usage

This interface enables users to create link between supplier and sub heads.

Only suppliers linked with offices would be listed in all purchase flow i.e. quotation received, purchase order etc.

11.3 Menu Access

Main Menu >> Purchase Masters >> Suppliers accounts linkage

11.4 Dependency

Supplier Master and office wise account sub heads.

11.5. To configure the supplier with accounts follow these steps as in the figure 11.1.

Step 1: Select the suppliers to be linked with accounts.

Step 2: Select the account head

Step 3: Select the account sub head.

Step4: Click on the save button to save the supplier with account details.

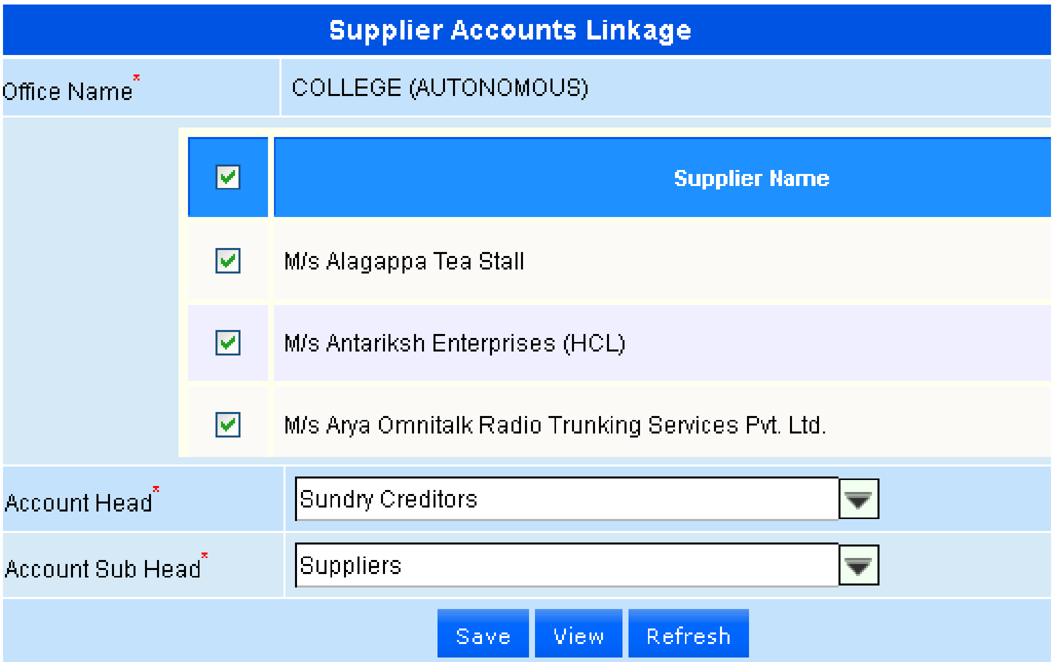


Figure 11.1

11.6. To **view** existing suppliers follow these steps.

Step1: *Click on the button “view” to view the supplier with account ledger details as in the figure 11.2.*

Sl. No	Supplier Name	Account Head	Account Sub Head
1	M/s Alagappa Tea Stall	Sundry Creditors	Suppliers
2	M/s Antariksh Enterprises (HCL)	Sundry Creditors	Suppliers
3	M/s Arya Omnitalk Radio Trunking Services Pvt. Ltd.	Sundry Creditors	Suppliers
4	M/s B.GANDHI Interior Work	Sundry Creditors	Suppliers
5	M/s CALLIDAI MOTOR WORKS	Sundry Creditors	Suppliers
6	M/s ELECRTICALS N ELECTRICALS	Sundry Creditors	Suppliers

Figure 11.2

12. Supplier Contacts

12.1. Intended Audience

Purchase Manager and System Administrator.

12.2. Usage

This interface enables users to create a client's personal details.

12.3. Menu Access

Main Menu >> Purchase Masters >>Supplier Contacts

12.4. Dependency

None.

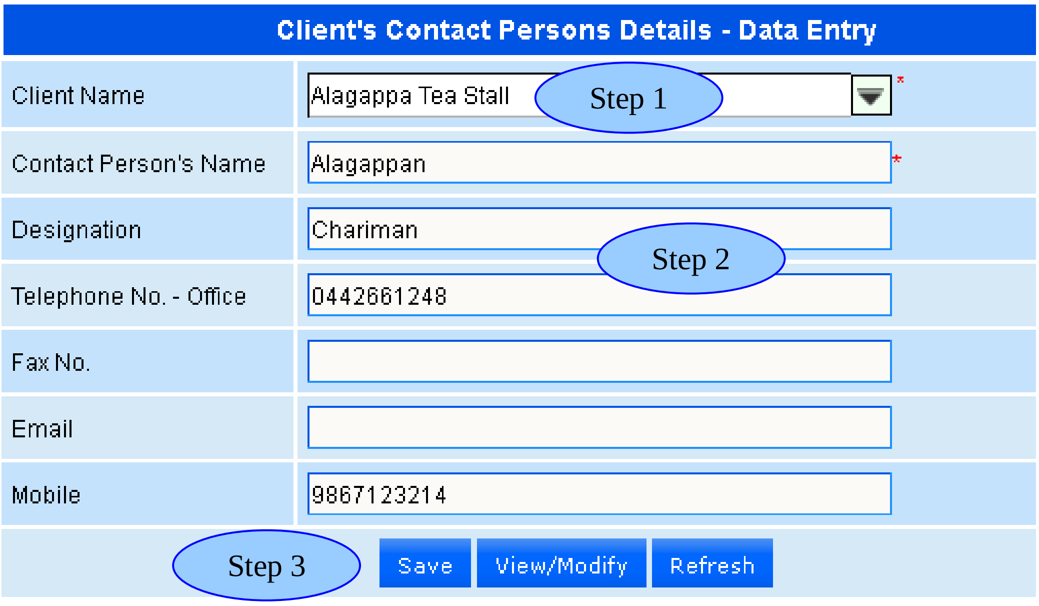


Figure 12.1

12.5. To Add the supplier contacts for the selected supplier follow these steps as in the figure 12.1.

Step1: Select the supplier.

Step2: Enter the contact person details for the selected supplier.

Step3: Click on the "Save" button save the contact details of the selected supplier.

12.6. To **modify** existing client's details follow these steps

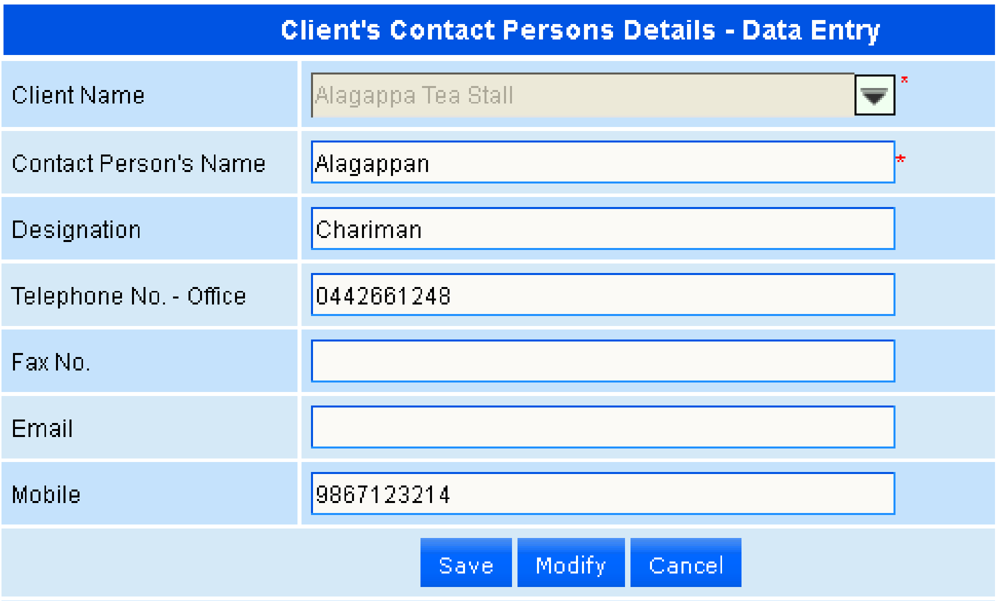
Step1: *Click on the button "View/Modify, new interface would appear as shown in figure 12.2.*

Step2: *Select the supplier's contact to be modified, then screen would appear as in the figure 12.3.*

Step3: *Modify the contact details of the selected supplier.*

Step4: *Click on the button "Modify" to save the contacts of the supplier.*

Figure 12.2



. **Figure 12.3**

13. Supplier wise Products

13.1. Intended Audience

Purchase Manager and System Administrator.

13.2. Usage

This interface used to create a link between supplier and their products.

13.3. Menu Access

Main Menu >> Purchase Masters >> Supplier wise Products.

13.4. Dependency

Product Master, Supplier Master

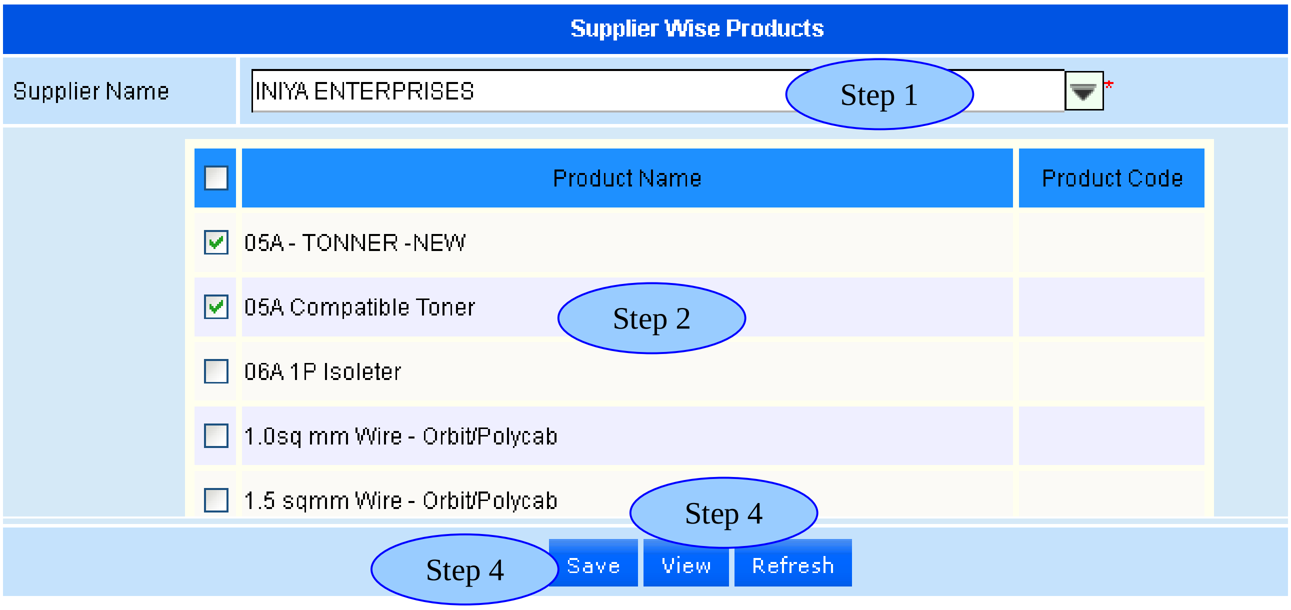


Figure 13.1

Product Name	Product Code
05A - TONNER -NEW	
05A Compatible Toner	
ACID	
CLEANING POWDER	
FLOOR CLEANER	
HARPIC 500ML	
ROOM SPRAY	
SOAP OIL	
WASH PASSION BALL	

Figure 13.2

13.5. To **Add/view** the products to the selected supplier follow these steps as shown in figure 13.1.

Step1: *Select the supplier from the drop-down list.*

Step2: *Select the products to be linked to the supplier.*

Step3: *Click on the button "Save" to save the selected products to the selected supplier.*

Step4: *Click on the button "View" to view the products for the selected supplier wise as in the figure 13.2.*

14. Product Installation

14.1. Intended Audience

System administrator.

14.2. Usage

This is used to add opening stock entry in each department/division wise.

14.3. Menu Access

Main Menu >> Purchase Masters >> Product Installation.

14.4. Dependency

Product Master and Division Master

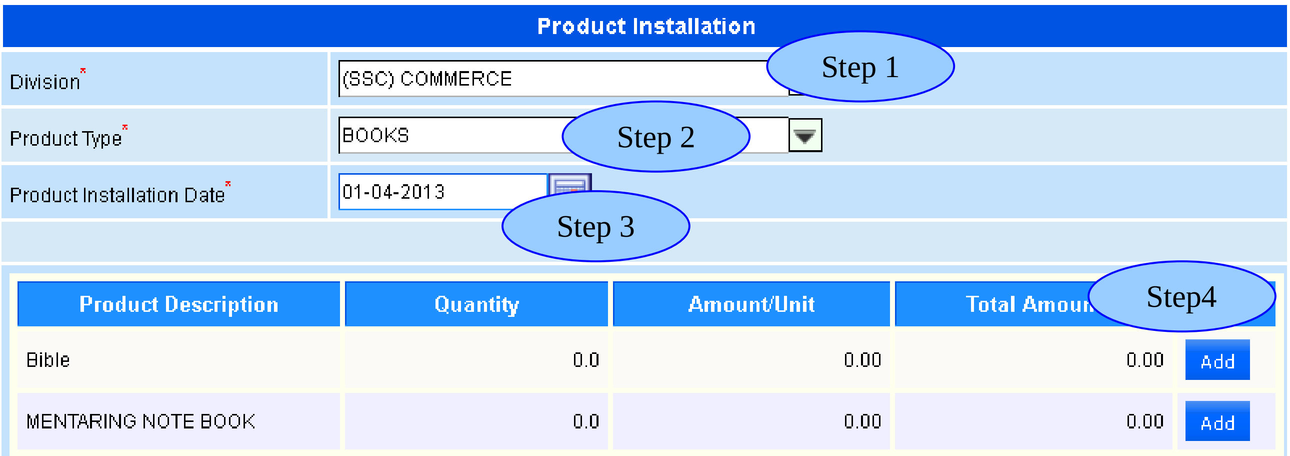


Figure 14.1

14.5. To make a **Opening stock entry** follow these steps,

Step1: *Select the division from the drop-down list.*

Step2: *Select the product type from drop-down list.*

Step3: *Select the product installation date.*

Step4: *Click on the button "Add" to add the stock for the selected product. And the enter quantity and price per unit. Then click on the button "Save" to save the stock.*

15. Asset Location

15.1. Intended Audience

System administrator.

15.2. Usage

This is used to create the asset location in the Asset location master

15.3. Menu Access

Main Menu >> Purchase Masters >> Asset Location Master.

15.4. Dependency

None

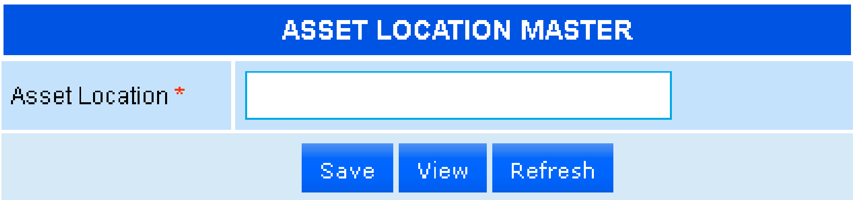


Figure 15.1

15.5. To make a **new entry** follow these steps,

Step1: E*nter asset location name required to create.*

Step2: *click "save" button to complete location entry.*

15.6. To **view** existing location follow these steps

Step1: *click "view" button, page would load with all location as shown in figure 15.2.*

Step2: *click "Back" button, initial page would load are shown in figure 15.1.*

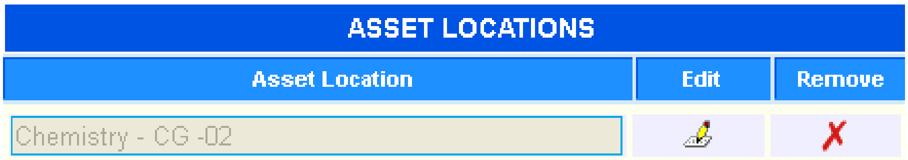


Figure 15.2

Step3: Click on the edit icon to edit the selected asset location. Modify the asset location, and then press tab key to save the modified asset location.

Step4: Click on the remove icon to remove the selected asset location.

.

16. Asset Installation (Asset Creation)

16.1. Intended Audience

Purchase Requestor and System Administrator.

16.2. Usage

This interface is used to create asset for the selected office, division, and asset location.

16.3. Menu Access

Purchase Transaction>>Asset Register

16.4. Dependency

Asset Location, Product Master, Division Master

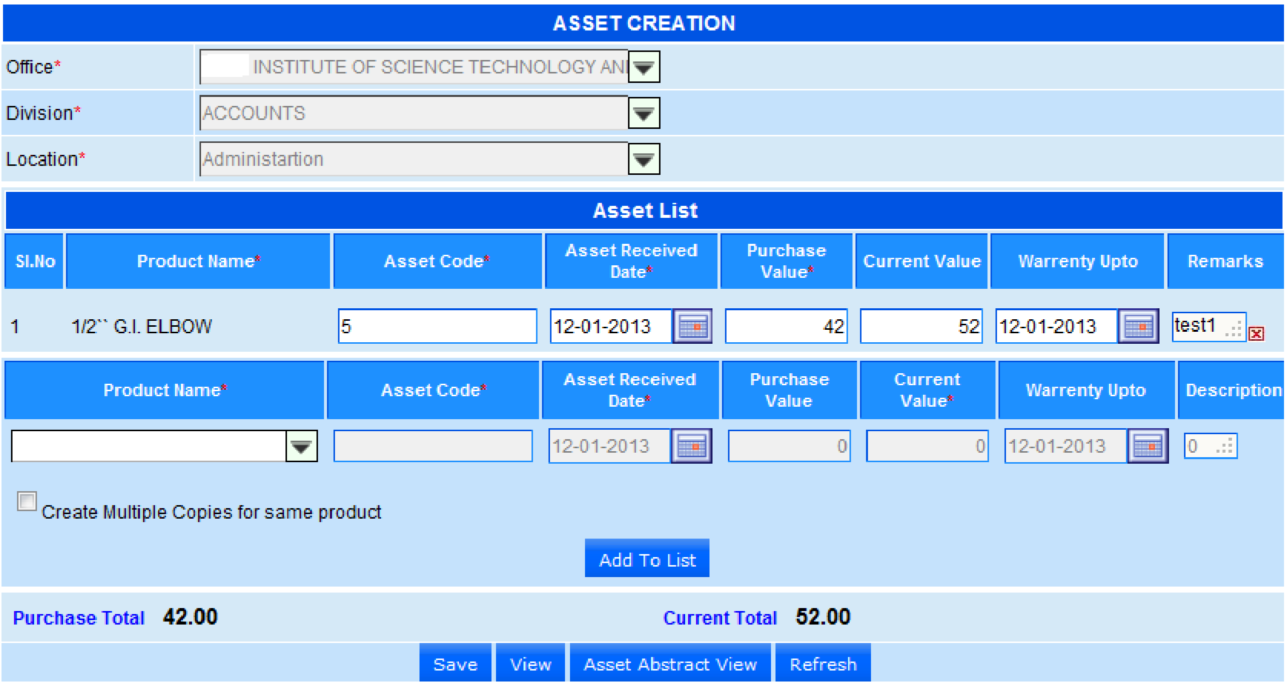


Figure 16.1

16.4. To **create asset** follow these steps,

Step1: *Select the office name.*

Step2: *Select the division.*

Step3: *Select the asset location*

Step4: *Select the product to be created asset. And then enter the asset code, received date, current value, warranty and remarks. Then click on the button "Add to List" to add the asset to the list. If need to create asset for the selected same product, check on the checkbox "Create Multiple Copies for same product".*

Step5: *After added the products, Click on the "Save" button to register assets from the list to the selected office, division and asset location.*

Step6: *Click on the button "View" then screen would appear as in the figure 16.2.*

Step7: *Click on the button "Asset Abstract View" then screen would appear as in figure 16.3.*

ASSET REGISTER

Asset Register of ADVANCED ZOOLOGY / ADVANCED ZOOLOGY DEPNT STOCK

Product Name	Asset Code	Received Date	Asset Description	Purchase Value	Current Value
40w patti	LC-TL-	04-Mar-2013	TUBE LIGHT	1.00	1.00
40w patti	LC-TL-	04-Mar-2013	TUBE LIGHT	1.00	1.00
40w patti	LC-TL-	04-Mar-2013	TUBE LIGHT	1.00	1.00
40w patti	LC-TL-	04-Mar-2013	TUBE LIGHT	1.00	1.00
40w patti	LC-TL-	04-Mar-2013	TUBE LIGHT	1.00	1.00

Figure 16.2

ASSET REGISTER - ABSTRACT

Department : ADVANCED ZOOLOGY / ADVANCED ZOOLOGY DEPNT STOCK

SL.No.	Product Name	Total Quantity	Purchase Value	Current Value
1	40w patti	6	6.00	6.00
2	AUDIO SYSTEM	2	2.00	2.00
3	Camera	1	1.00	1.00
4	COMPUTER	2	2.00	2.00
5	Computer Table	3	3.00	3.00
6	Fan 900 MM	8	8.00	8.00
7	File Cupboard	11	11.00	11.00
8	FRIDGE	2	2.00	2.00

Figure 16.3

III Purchase Transactions

17. Workflow Engine

17.1. Intended Audience

System Administrator

17.2. Usage

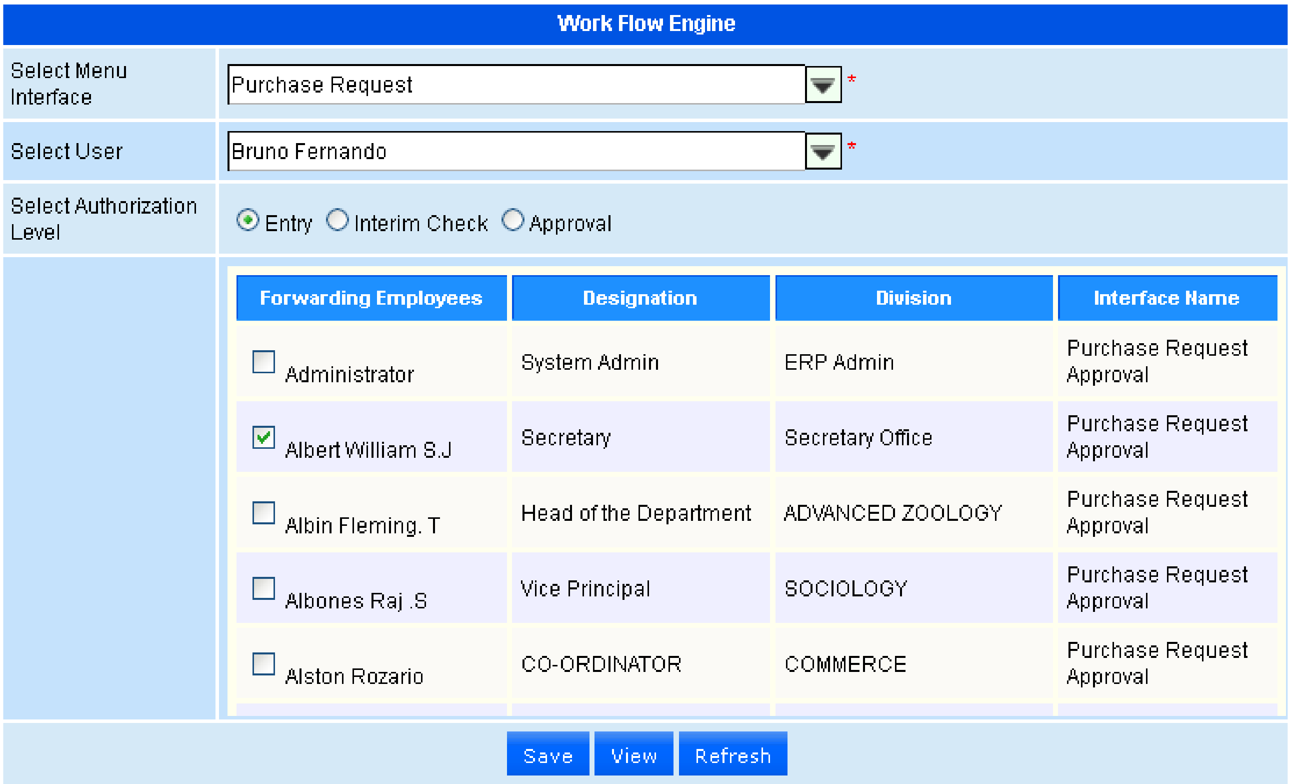
This interface controls the flow of purchase request and purchase order. This ensures the workflow automation suggested by the management.

17.3. Menu Access

Main Menu >>Administration >> Workflow Engine.

17.4. Dependency

None.



Work Flow Engine

Select Menu Interface: Purchase Request *

Select User: Bruno Fernando *

Select Authorization Level: Entry / Interim Check / Approval

Forwarding Employees	Designation	Division	Interface Name
Administrator	System Admin	ERP Admin	Purchase Request Approval
Albert William S.J	Secretary	Secretary Office	Purchase Request Approval
Albin Fleming. T	Head of the Department	ADVANCED ZOOLOGY	Purchase Request Approval
Albones Raj .S	Vice Principal	SOCIOLOGY	Purchase Request Approval
Alston Rozario	CO-ORDINATOR	COMMERCE	Purchase Request Approval

Save View Refresh

Figure 17.1

17.5. To make a new entry follow these steps,

Step1: *select interface from menu interface to which work flow is to be simulated.*

Step2: *select user to whom workflow control is to be enabled.*

Step3: *select employee's authorization level whether to be considered entry, interim check or approval.*

Step4: *select employee(s) to whom workflow can be forwarded.*

Step5: *click "Save" button to register the workflow control.*

17.6. To make a modify follow these steps,

Step1: *Select menu interface and user to whom workflow control is to be modified.*

Step2: *Popup message would appear for confirmation on modification.*

Step4: *On confirmation, it would display the existing workflow with forwarding employees.*

Step5: *Modify the existing workflow.*

Step7: *Click on "Modify" button to complete workflow control modification.*

Sl No	Division	Menu Interface Name	User Name	Authorization Level	Forwarding Users
1	(SSC) FRENCH	Purchase Request	Durgadevi. P.S Asst. Professor (SSC) FRENCH	Entry	Rebecca George Associate Professor FOREIGN LANGUAGE
2	(SSC) M.L.T	Purchase Request	Ambrose.T CO-ORDINATOR (SSC) M.L.T	Interim Check	Albert William S.J Secretary Secretary Office
3	(SSC) VIS.COMM.	Purchase Request	Chinnappan. L Asst. Professor (SSC) VIS.COMM.	Entry	Henry Maria Victor Asst. Professor VISUAL COMMUNICATION
4	ADVANCED ZOOLOGY	Purchase Request	John William Associate Professor ADVANCED ZOOLOGY	Entry	Albert William S.J Secretary Secretary Office

Figure 17.2

17.6. To **view** existing course follow these steps,

Step1*: Click on the "View" button, to list would appear with all available work flows as in the figure 17.2.*

18. Purchase Indent Period

18.1. Intended Audience

System Administrator

18.2. Usage

This interface is used to create purchase indent period. This purchase indent period is implemented in purchase request.

18.3. Menu Access

Main Menu >>Transaction >> Purchase Indent Period.

18.4. Dependency

Product Type Master.

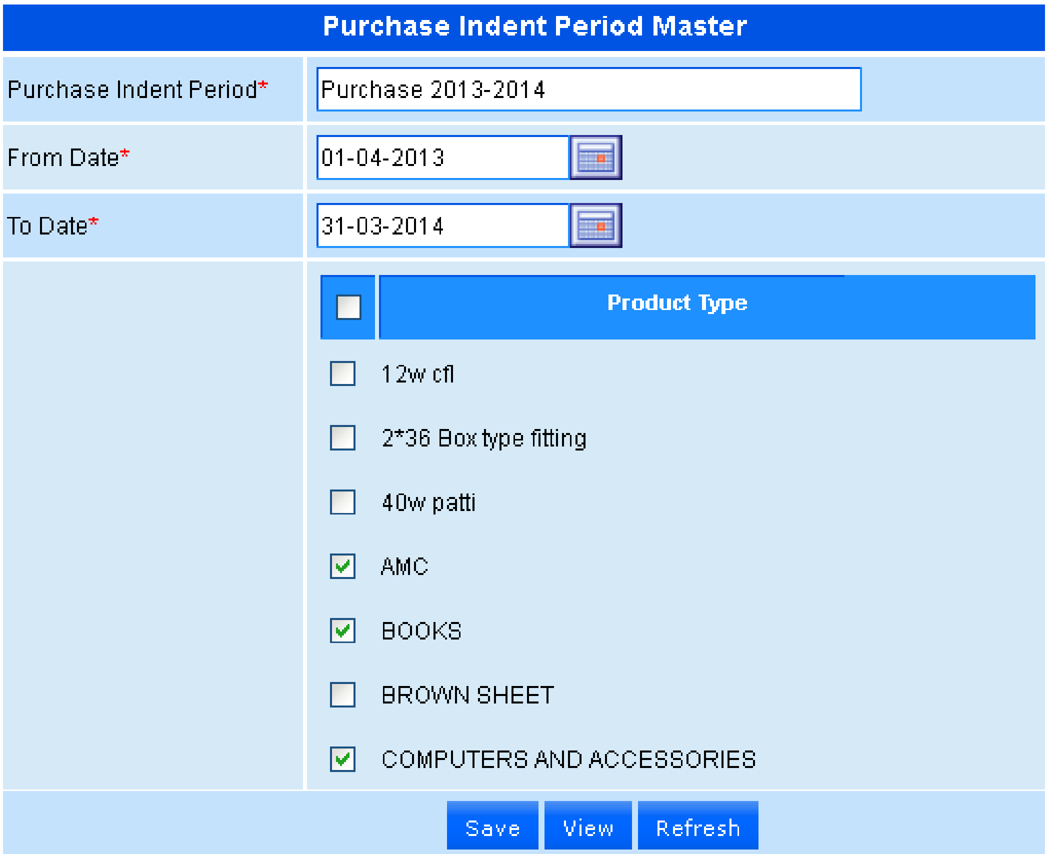


Figure 18.1

18.5. To create a purchase indent period follows these steps,

Step1: *Enter the purchase indent period name.*

Step2: *Select the date range.*

Step3: *Select the product types to be purchased on this selected date range.*

Step4: *Click on the "Save" button to create a purchase indent period newly.*

18.5. To View/modify the purchase indent periods follow these steps,

Step1: *Click on the button "View' to view the purchase indent periods. Then screen would appear as in the figure 18.2.*

Step2: *Select the purchase indent period to be modified. Then screen would appear as in the figure 18.1.*

Step3: *You can edit the purchase indent period name, date range and select/deselect the product types.*

Step4: *Click on the button "Modify" to modify the purchase indent period details.*

Purchase Indent Period View

S. No	Purchase Indent	From Date	To Date
1	General Purchase 2011-12	14-03-2012	31-03-2012
2	Purchase 2012-2013	01-04-2012	31-03-2013
3	Purchase 2013-2014	01-04-2013	31-03-2014

Figure 18.2

19. Purchase Request

19.1. Intended Audience

Purchase Requestor and System Administrator

19.2. Usage

This interface is used to raise a purchase requisition in e-Varsity ERP.

19.3. Menu Access

Main Menu >>Transaction >> Purchase Request.

19.4. Dependency

Purchase indent Period Master.

19.5. To create a purchase request follows these steps,

Step1: *Enter the valid purchase requisition date, by default it would display current date.*

Step2: *Select the purchase indent period.*

Step3: *Click on the button "Add Product Details" to add the products to the list. Then screen would appear as in the figure 19.2.*

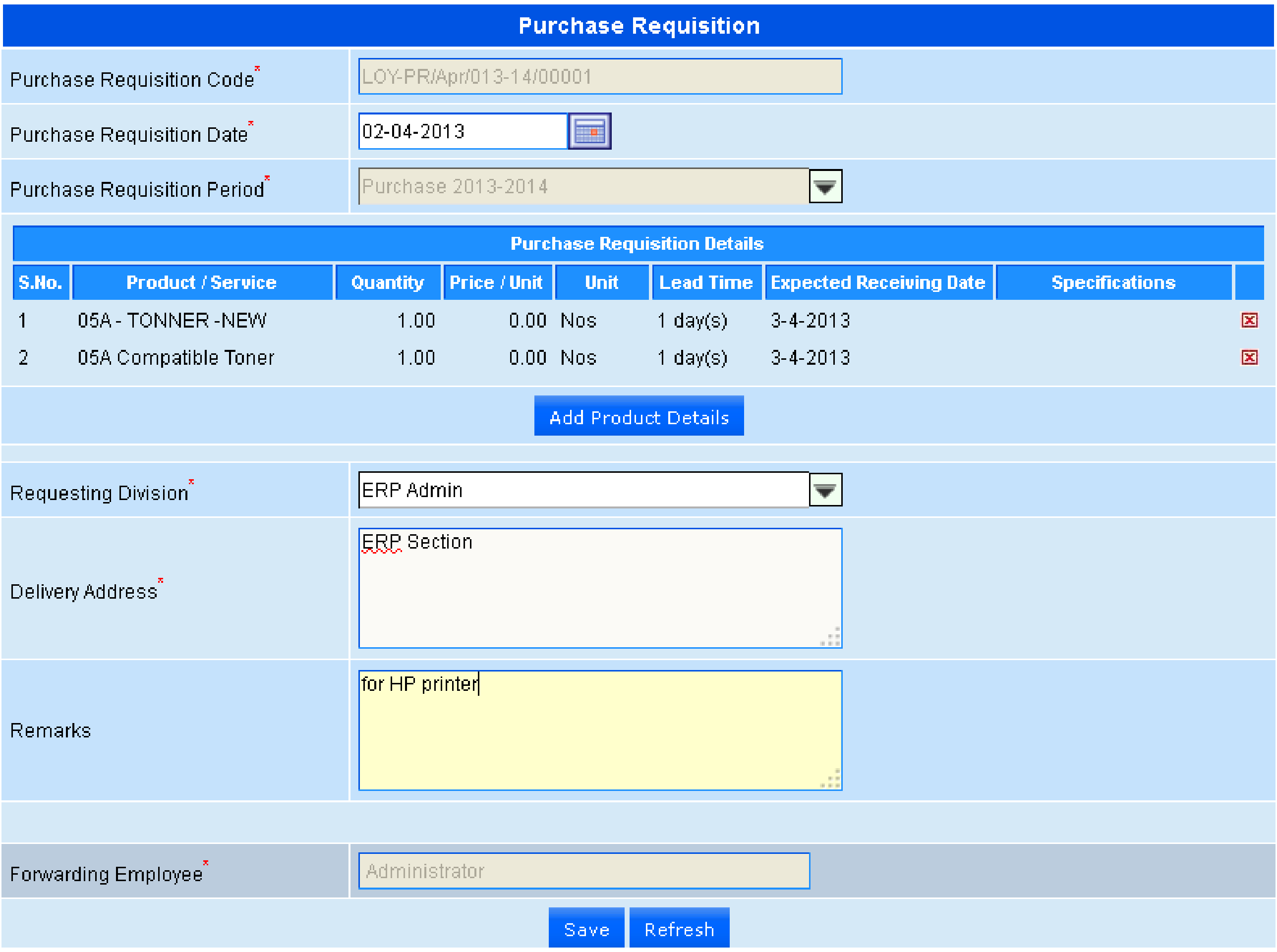


Figure 19.1

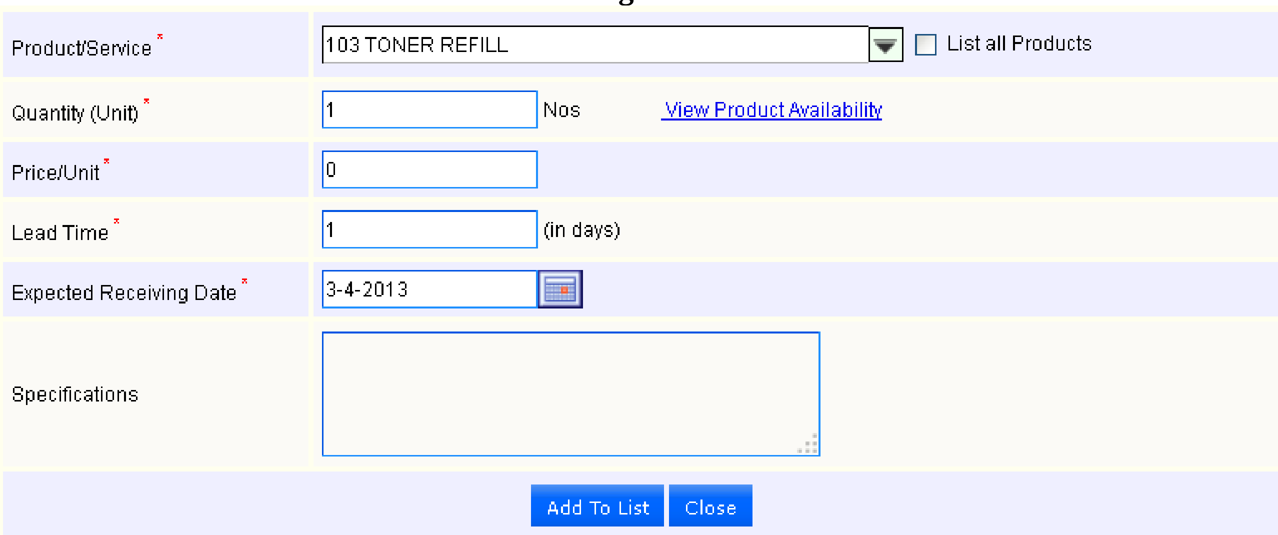


Figure 19.2

and then follow these steps to add the products,

1. *Select the product from the drop-down list*

2. *Enter quantity as per the unit of measurement. If required, click the link "view product availability", would appear available products for all office.*
3. *Enter the price per unit.*
4. *Enter lead-time and expected receiving date.*
5. *Select the expected received date.*
6. *Enter the product specification.*
7. *Click on the button "Add to List" to add the list.*

And repeat these steps to add more products.

Step4: *Select the requesting division. Default user's division loaded.*

Step5: *Enter the delivery address*

Step6: *Enter the remarks.*

Step7: *If one or more the forwarding users found, we can able to select the forwarding users. Otherwise we won't able to select the forwarding users.*

Step8: *Click on the button "Save" to save the purchase request entry. This purchase request is automatically forwarded to the forwarded user.*

20. Purchase Request Modification

20.1. Intended Audience

Purchase Requestor.

20.2. Usage

This interface is used to modify the purchase requisition made by purchase requestor before approval of his purchase request.

20.3. Menu Access

Main Menu >>Transaction >> Purchase Request Modification.

20.4. Dependency

Purchase Request.

Purchase Request Modification						
Purchase Requisition List						
Period	Request Code	Date	Office	Division	Request by	Remarks
General Purchase 2011-12	LOY-PR/Mar/011-12/00034	30-03-2012	COLLEGE (AUTONOMOUS)	ERP Admin	Administrator	
General Purchase 2011-12	LOY-PR/Mar/011-12/00035	30-03-2012	COLLEGE (AUTONOMOUS)	ERP Admin	Administrator	

Figure 20.1

20.5. To modify the purchase request follows these steps,

Step1: *Select the purchase request in the figure 20.1. Then screen would appear as in the figure 20.2.*

Step2: *User can able to add/remove the products of the selected purchase request. If need to add more products , click on the button "Add Product Details". If the user wants to change the requested quantity, remove the product in the list, and then add that product with details.*

Step3: *Click on the button "Save' to modify the purchase request.*

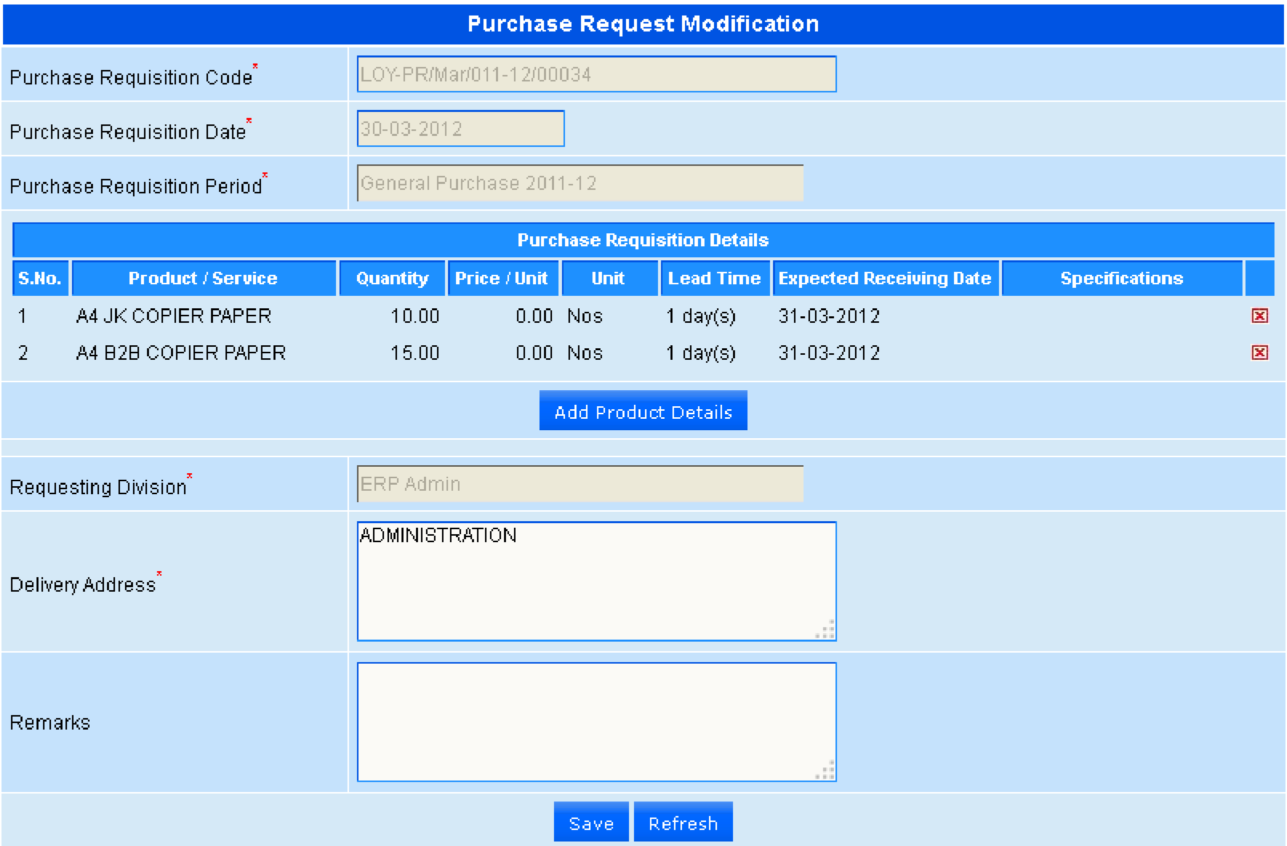


Figure 20.2

21. Purchase Request Approval

21.1. Intended Audience

Secretary, Principal, Dean, Director and Purchase Department.

21.2. Usage

This interface is used to approve purchase requisition raised by the departments.

21.3. Menu Access

Main Menu >>Purchase Transactions >>Purchase Requisition Approval.

21.4. Dependency

Purchase Requisition.

Purchase Requisition Approval

Purchase Requisition List

☐	Period	Request Code	Date	Office	Division	Request by	Remarks
☐	General Purchase 2011-12	LOY-PR/Mar/011-12/00034	30-03-2012	COLLEGE (AUTONOMOUS)	ERP Admin	Mr. Administrator	
☐	General Purchase 2011-12	LOY-PR/Mar/011-12/00035	30-03-2012	COLLEGE (AUTONOMOUS)	ERP Admin	Mr. Administrator	

Approve Selected

Figure 21.1.

21.5. To make a **purchase request approval** follow these steps,

Step1: List shows the purchase requisition awaiting for approval.

Step2: Select the purchase request by individually approve or reject or modify the quantity. Then screen would appear as 21.2. And then follow the steps in the below,

1. Enter the approval comments or rejected comments.
2. If needs to forward this purchase request for any user, select the check box “Send back”. And then select the user to forward this purchase request.
3. Click on the button “Approve” to approve this purchase request if required.
4. Click on the button “Reject” to reject the purchase request if required.
5. Click on the button “Back” would let user to view purchase requisition list awaiting for approval.

Step3*: If need to approve the multiple purchase requests, select the purchase requests to be approved. And then click on the button “Approve Selected” to approve those purchase requests.*

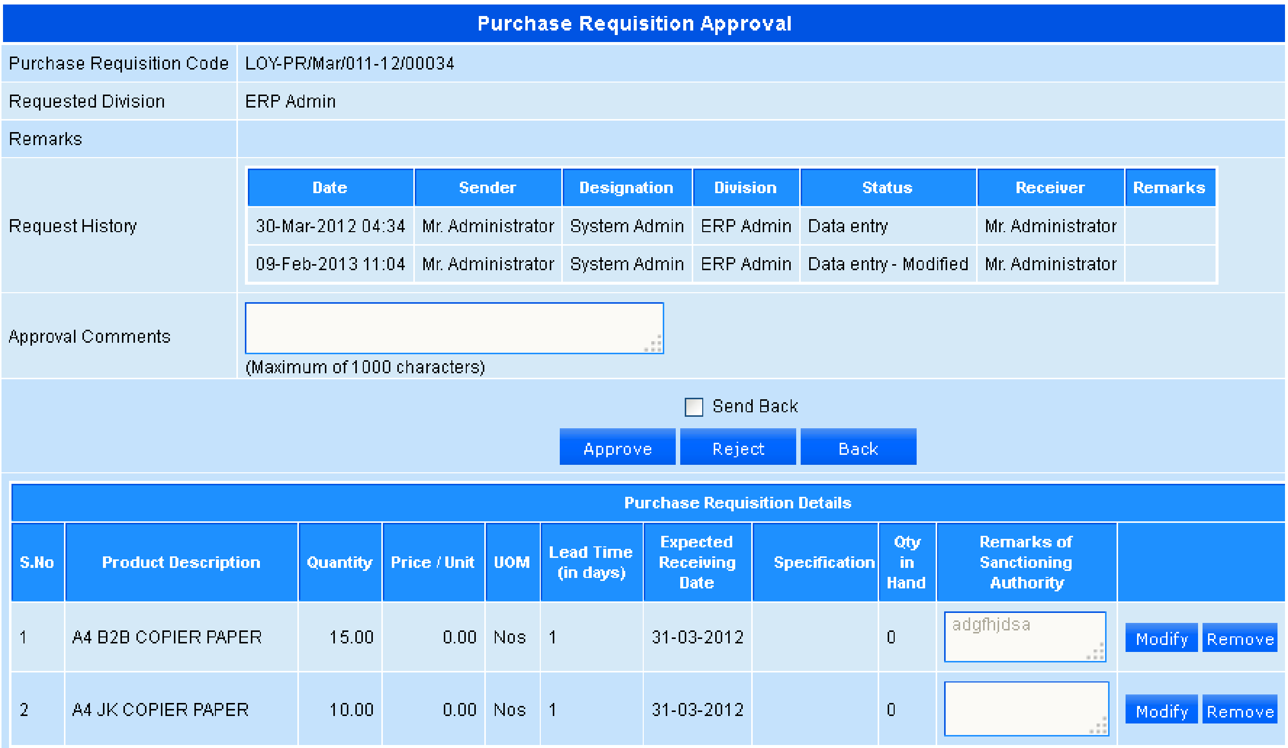


Figure 21.2.

22. Stock Transfer from Request

22.1. Intended Audience

Purchase Department.

22.2. Usage

This interface is used to transfer the available stocks to the departments based on their purchase requests.

22.3. Menu Access

Main Menu >>Purchase Transactions >>Stock Transfer Request.

22.4. Dependency

Purchase Requisition Approval.

22.5. To make stock transfer follow these steps as in the figure 22.1.

Step1: *Select date range.*

Step2: *Select the purchase request from the drop-down list.*

Step3: *Select the check box to be transferred the selected item (If stock is available only shown* *check box, otherwise won't). And then enter the processed quantity. Repeat this step for all products, if necessary.*

Step4: *Click on the button "Stock Transfer Request" to transfer the stock to the selected division.*

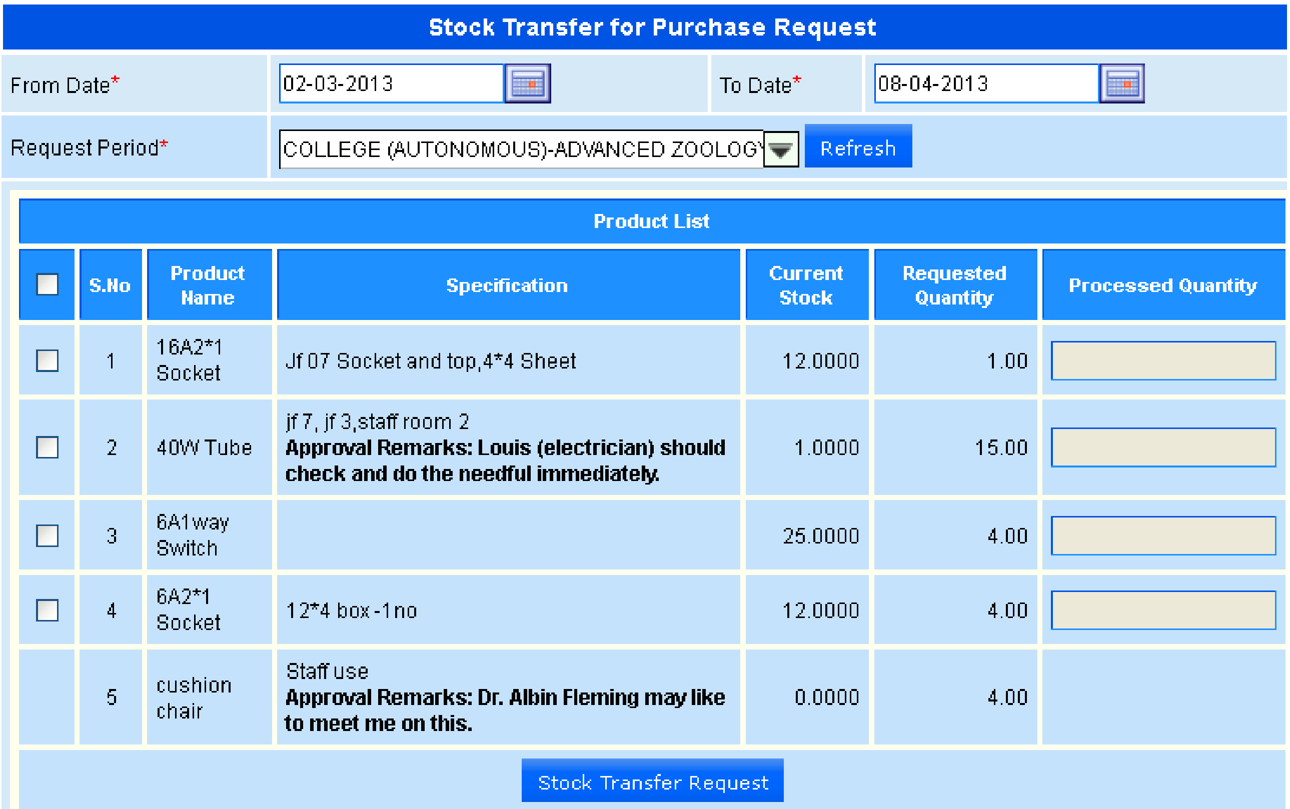


Figure 22.1

23. Purchase Initiation for Request

23.1. Intended Audience

Purchase Department.

23.2. Usage

This interface is used to initiate the purchase requests made by various departments.

23.3. Menu Access

Main Menu >>Purchase Transactions >>Purchase Initiation from Request.

23.4. Dependency

Purchase Requisition Approval.

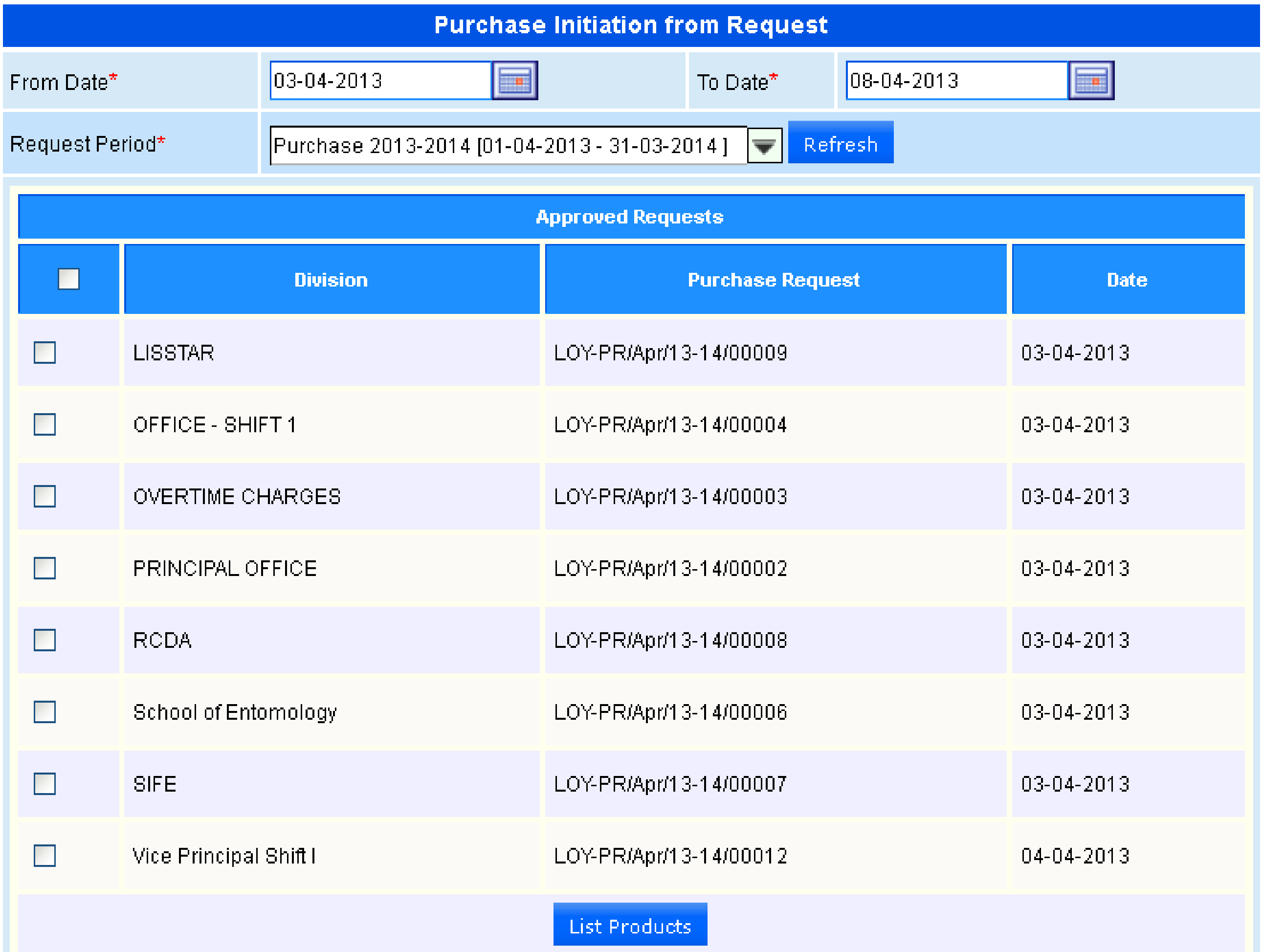


Figure 23.1

23.5. To initiate the purchase requests follows these steps,

Step1: *Select the date range.*

Step2: *Select the purchase indent period from the drop-down list.*

Step3: *Select the purchase requests from the list.*

Step4: *Click on the button "List Products" to list the products. Then screen would appear as in the figure 23.2.*

Step5: *Select the products from the list to be initiated for purchase.*

Step6: *Click on the button "Initiate Purchase" to initiate those selected products for purchase.*

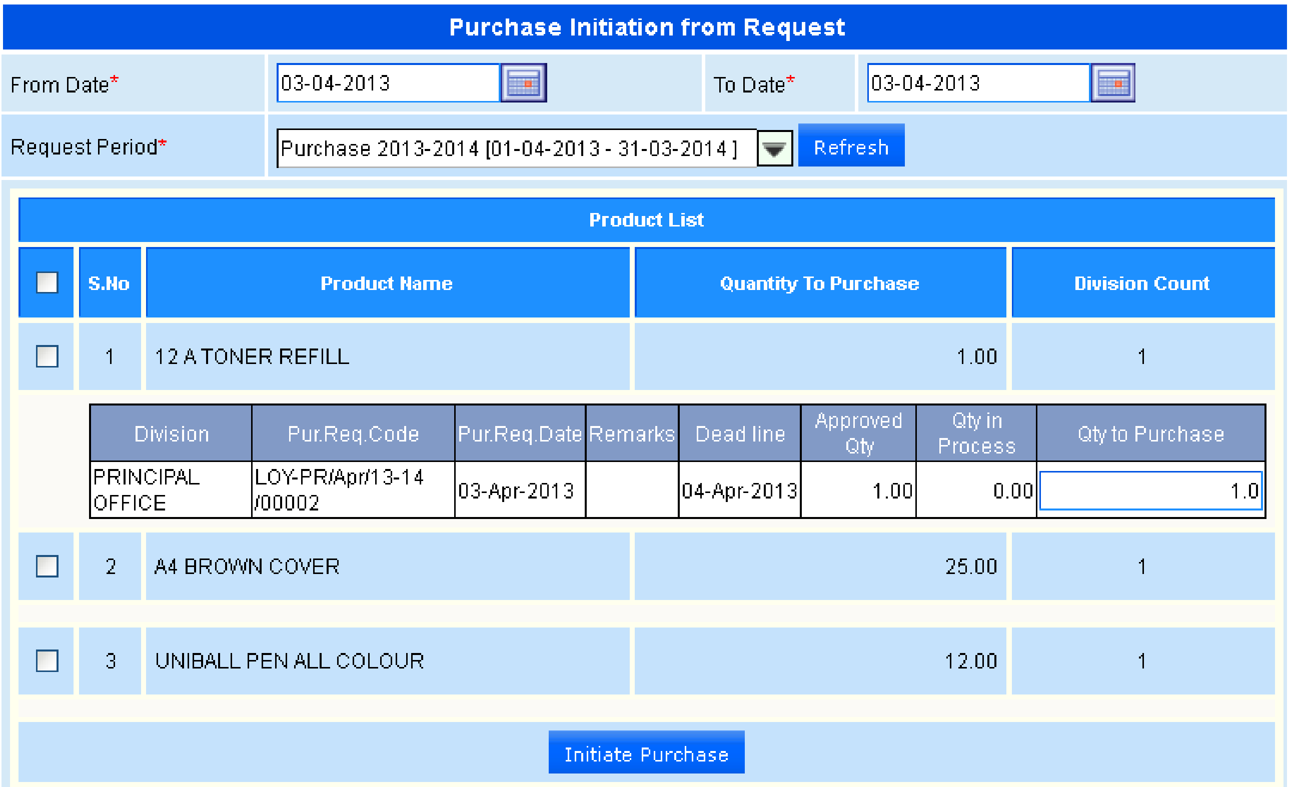


Figure 23.2

24. Send Quotation to Suppliers

24.1. Intended Audience

Purchase Department.

24.2. Usage

This interface is used to initiate the purchase requests made by various departments.

24.3. Menu Access

Main Menu >>Purchase Transactions >>Purchase Initiation from Request.

24.4. Dependency

Purchase Initiation for Request.

24.5. To send Quotation to suppliers follow these steps,

Step1: *Select the quotation from the list. And then screen would appear as in the figure 24.2.*

Step2: *Add the suppliers from the drop-down list.*

Step3: *Enter the message to those selected supplier.*

Step4: *Select the products to be sent to the suppliers.*

Step5: *Click on the button "Send Mail" to send the mail to the selected suppliers.*

Send Quotation To Suppliers					
Quotation Ref No	Quotation Date	Opening Authority	Type	Divisions	Remarks
LOY-TR/Apr/012-13/00003	26-Apr-2012	Administrator	Purchase 2012-2013	PU-LC TWINNING	Multiple Requests
LOY-TR/Apr/012-13/00002	20-Apr-2012	Rajasekar A	Purchase 2012-2013	ADVANCED ZOOLOGY	Multiple Requests
LOY-TR/Apr/012-13/00001	18-Apr-2012	Rajasekar A	Purchase 2012-2013	ERP Admin	Multiple Requests

Figure 24.1

Send Quotation To Suppliers

Quotation Details	
Quotation Ref No	LOY-TR/Apr/012-13/00002
Quotation Date	20-Apr-2012
Opening Authority	Rajasekar A
Purchase Req. Period	Purchase 2012-2013
Division(s) Requested	ADVANCED ZOOLOGY

Select Supplier	M/s K.P. TRADERS M/s Connectwell Technologies Pvt Ltd
Subject	Quotation Ref. No.LOY-TR/Apr/012-13/00002
Message	Multiple Requests
	Send Mail Refresh Back
Already sent to supplier	None

Product List						
S.No.	☑	Product Name	Quantity	Unit	Remarks	Details
1	☑	Lab Specimen - Cockroaches	1.00	Nos	Frogs and cockroaches	View
2	☑	Lab Specimen - Frogs	1.00	Nos	Frogs and Chironomus	View
3	☑	Lab Specimens - Shark	1.00	Nos		View

Figure 24.2

25. Supplier Rate Contract

25.1. Intended Audience

Purchase Department.

25.2. Usage

This interface is used configure the rate, tax and discount for the products in supplier wise.

25.3. Menu Access

Main Menu >>Purchase Transactions >>Supplier Rate Contract.

25.4. Dependency

Supplier Wise Products.

25.5. To configure the supplier wise rate contract follows these steps,

Step1: *Select the supplier from the drop-down list.*

Step2: *Select the product to be configured the rate, discount and tax.*

Step3: *Click on the button "Save" to save the details for the selected products.*

25.6. To view the supplier wise rate contract follow these steps,

Step1: *Select the supplier from the drop-down list.*

Step2: *Click on the button "View" to view the supplier wise rate contract details as in the figure 25.2.*

Figure 25.1

Figure 25.2

26. Quotation Received Details

26.1. Intended Audience

Purchase department.

26.2. Usage

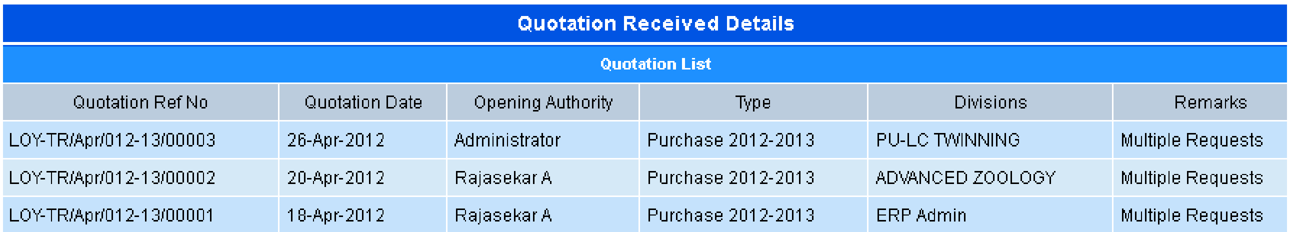
This interface is used to register the price details for the quotation received from the supplier.

26.3. Menu Access

Main Menu >>Purchase Transactions >> Quotation Received Details.

26.4. Dependency

Purchase Initiation for Request.



Quotation Received Details

Quotation List

Quotation Ref No	Quotation Date	Opening Authority	Type	Divisions	Remarks
LOY-TR/Apr/012-13/00003	26-Apr-2012	Administrator	Purchase 2012-2013	PU-LC TWINNING	Multiple Requests
LOY-TR/Apr/012-13/00002	20-Apr-2012	Rajasekar A	Purchase 2012-2013	ADVANCED ZOOLOGY	Multiple Requests
LOY-TR/Apr/012-13/00001	18-Apr-2012	Rajasekar A	Purchase 2012-2013	ERP Admin	Multiple Requests

Figure 26.1

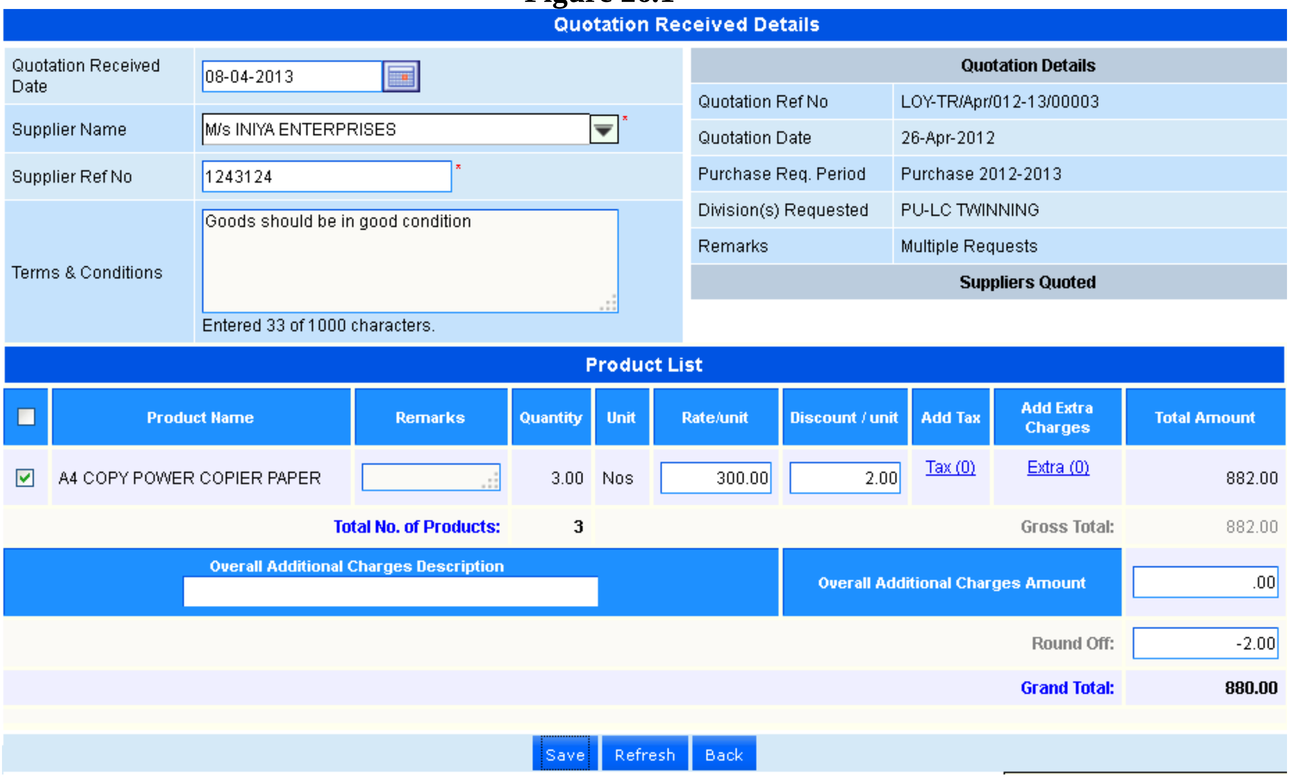


Figure 26.2

26.5. To make a **new entry** follow these steps,

Step1: *click on the quotation list from the figure 26.1 and then screen would be listed. (Refer Figure 26.2)*

Step1a: *select supplier.*

Step1b*: enter supplier reference number.*

Step1c: if any, enter terms and conditions.

Step1d*: check on the product from the product list.*

Step 1e: *enter rate per unit, discount per unit and tax details for the selected product.* (The price details for the selected supplier would appear, if pre-quotation entry completed. Refer 25.5.)

Step 1f: if required, enter description, amount and round off.

Step 1g: *click "save" button to save the quotation received details for the selected supplier.*

27. Quotation Received Modification

27.1. Intended Audience

Purchase department.

27.2. Usage

This interface is used to modify the quotation received details for the selected quotation and supplier.

27.3. Menu Access

Main Menu >>Purchase Transactions >> Quotation Received Modification.

27.4. Dependency

Purchase Initiation for Request.

Quotation Received Modification					
Quotation Received List					
Quotation Ref No	Quotation Date	Opening Authority	Type	Divisions	Remarks
LOY-TR/Apr/012-13/00001	18-Apr-2012	Rajasekar A	Purchase 2012-2013	ERP Admin	Multiple Requests

Figure 27.1

27.5. To make a **new entry** follow these steps,

Step1: *click on the quotation list from the figure 27.1 and then screen would be listed. (Refer Figure 27.2)*

Step1a: *select supplier.*

Step1b*: modify supplier reference number if required.*

Step1c: *modify if any, enter terms and conditions.*

Step1d*: check on the product from the product list.*

Step 1e: *modify rate per unit, discount per unit and tax details for the selected product. (The price details for the selected supplier would appear, if pre-quotation entry completed. Refer 25.5.)*

Step 1f: if required, enter description, amount and round off.

Step 1g: *click "Modify" button to modify the quotation received details for the selected supplier*.

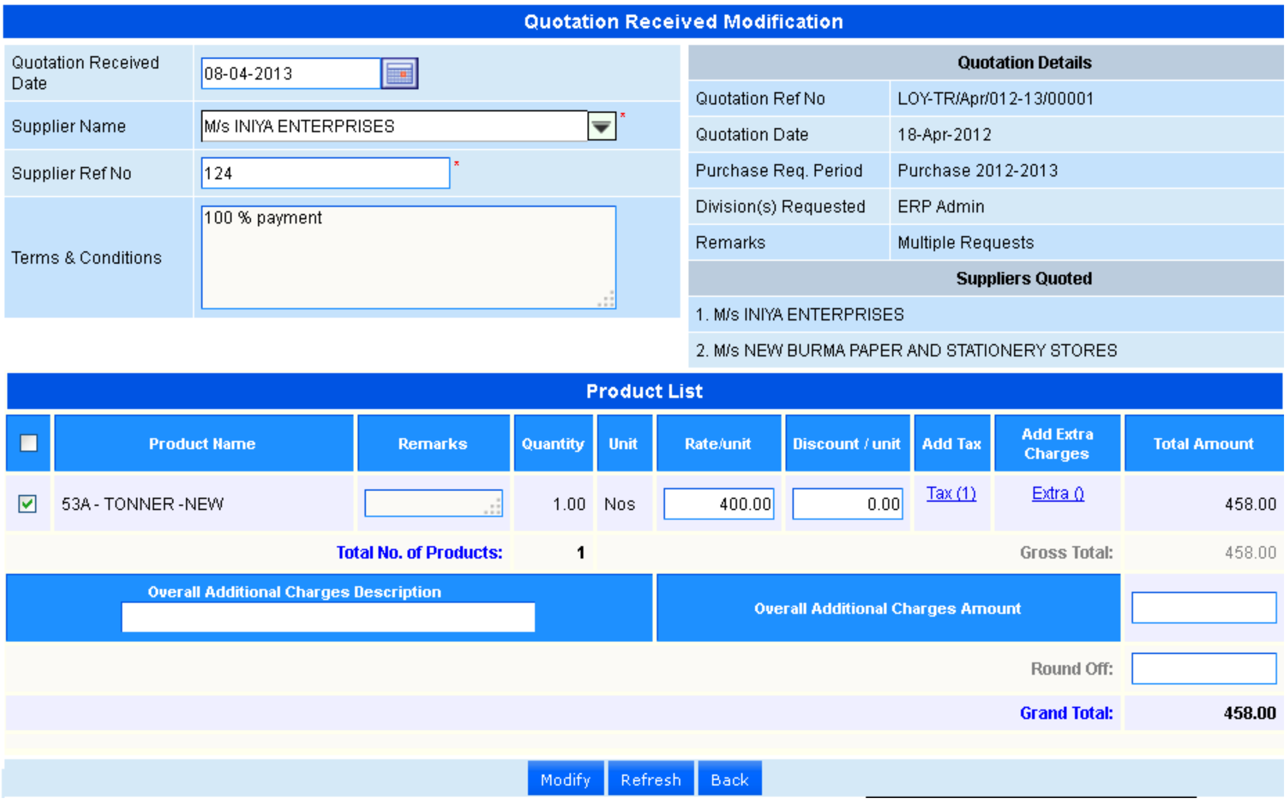


Figure 27.2

28. Quotation Attachment

28.1. Intended Audience

Purchase Department.

28.2. Usage

This interface is used to attach the scanned copy from the supplier quotation documents .

28.3. Menu Access

Main Menu >>Purchase Transactions >>Quotation Attachment.

28.4. Dependency

Quotation Received Details.

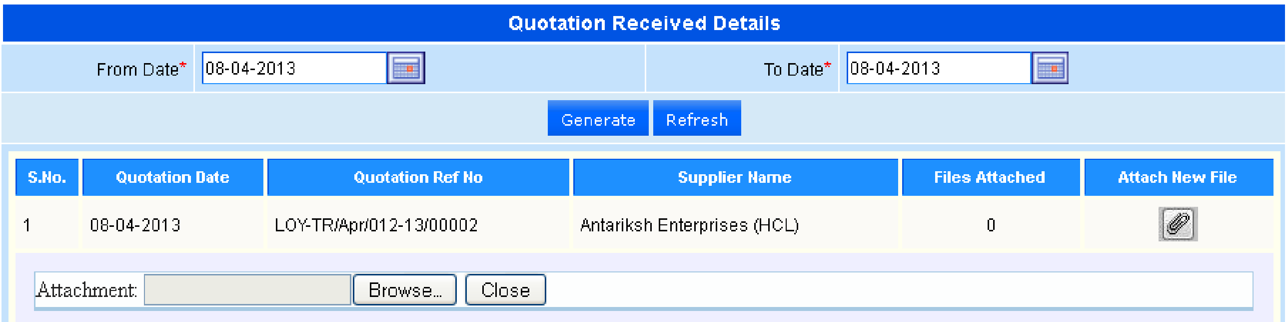


Figure 28.1

28.5. To attach a file follow these steps,

Step1: *Select the date range*

Step2: *Click on the button "Generate" to generate the quotation received details from the selected date range.*

Step3: *Click on the icon, to attach file for the selected quotation. And click on the button "Browse" to browse the file. If need to add more files, repeat this step.*

29. Quotation Finalization

29.1. Intended Audience

Purchase Department.

29.2. Usage

This interface is used to finalize the quotations, by finalizing a bidder, forward them to purchase department to approve the quotations.

29.3. Menu Access

Main Menu >>Purchase Transactions >>Quotation Finalization.

29.4. Dependency

Quotation Received Details.

Quotation Finalization					
Quotation / Tender List					
Quotation Ref No	Quotation Date	Type	Venue	Opening Authority	Remarks
LOY-TR/Apr/012-13/00004	26-Apr-2012	Purchase 2012-2013		Administrator	Multiple Requests
LOY-TR/Apr/012-13/00002	20-Apr-2012	Purchase 2012-2013		Rajasekar A	Multiple Requests
LOY-TR/Apr/012-13/00001	18-Apr-2012	Purchase 2012-2013		Rajasekar A	Multiple Requests

Figure 29.1

29.5. To **make quotation finalization,** follow these steps,

Step 1: List of Quotations waiting for approval will be listed *(as shown in Figure 29.1)*

Step 2*: To select a quotation click on respective row with reference to quotation reference number, quotation date etc. On selection, quotation received details with comparative figures on various suppliers as well as products would be listed as show in figure 29.2.*

Step3: *If any, enter approval remarks and click "approve" button.*

Step4: *if need to forward this quotation, check* "Send Back" and *select forwarding employee. And then click on "Forward" button the forwarded user.*

Quotation Bid Approval Details

Supplier Quotation List

	Quotation Received Date	Supplier Name	Overall Additional	Round off	Amount Quoted	Terms & Conditions
○	18-Apr-2012	M/s INIYA ENTERPRISES	0.00	0.00	458.00	100 % payment
○	18-Apr-2012	M/s NEW BURMA PAPER AND STATIONERY STORES	0.00	0.00	400.75	50% payment
Approval Remarks	-					

☐ Send Back | Approve | Refresh | Exit

Quotation Details
Quotation Ref No
LOY-TR/Apr/012-13/00001
Quotation Date
18-Apr-2012
Opening Authority
Rajasekar A
Remarks
Multiple Requests

Sl. No	Product Name	Quantity	Unit	Supplier	Enter Qty	Rate / Unit	Discount / Unit	Tax / Unit	Extra Charges	Total Amount
1	53A - TONNER -NEW	1.00	Nos	☐ M/s INIYA ENTERPRISES ()	1.00	400.00	0.00	(1)	0	458.00
				☐ M/s NEW BURMA PAPER AND STATIONERY STORES ()	1.00	350.00	0.00	(1)	0	400.75
				Total Entered Qty	0.00					

Figure 29.2

30. Quotation Approval

30.1. Intended Audience

Dean, Purchase Department.

30.2. Usage

This interface is used to approve the quotations

30.3. Menu Access

Main Menu >>Purchase Transactions >>Quotation Approval.

30.4. Dependency

Quotation Finalization.

Quotation Finalization					
Quotation / Tender List					
Quotation Ref No	Quotation Date	Type	Venue	Opening Authority	Remarks
/Nov/012-13/00176	21-Nov-2012	Nov 2012 - Copier Items		Stores	Multiple Requests
/Nov/012-13/00175	21-Nov-2012	Nov 2012 - Printer Toner		Stores	Multiple Requests
/Nov/012-13/00171	21-Nov-2012	Networking items		Stores	Multiple Requests
/Nov/012-13/00169	21-Nov-2012	Nov 2012 - Electrical		Stores	Multiple Requests
/Nov/012-13/00165	21-Nov-2012	Nov 2012 - AC Spare		Stores	Multiple Requests
/Nov/012-13/00164	21-Nov-2012	Nov 2012 - Computer items		Stores	Multiple Requests
/Nov/012-13/00157	21-Nov-2012	Oct 2012- Copier Access		Maria Diana.L	Multiple Requests
R/Nov/012-13/00145	14-Nov-2012	Electrical - LBS URG		Stores	Multiple Requests

Figure 30.1.

30.5. To **approve quotation** follow these steps,

Step 1: List of Quotations waiting for approval will be listed *(as shown in Figure 30.1)*

Step *2: To select a quotation click on respective row with reference to quotation reference number, quotation date etc. On selection, quotation received details with comparative figures on various suppliers as well as products would be listed as shown in figure 30.2.*

Step3: *If any, enter approval remarks.*

Step4: *Check on send back and select send back employee the click on "Send Back" button to complete interim approval.*

Step5: *click "Approve" button to complete quotation approval.*

Step6: *click "View Purchase Flow Details" to view the flow are shown in figure 30.3.*

Quotation Interim Check Approval Details				
Previous Next				
Quotation Ref No	Open Date Time	Forwarded By	Forwarded To	Sending Employee Remarks
SRMEC(K)-TR/Mar /08-09/00118	04-03-2009 04:03:28	Fipl Purchase	FIPL ACADEMY	-

Product List

	Product Name	Required Qty	Unit	Supplier	Quantity	Amount Quoted	Discount/ Unit	Tax %/ Unit	Extra Charges	Status
1.	Dotmatrix	1.00	Nos	AB Samuel	1.00	22.00	2.00	0.00	0.00	Interim Approval

Figure 30.2

31. Purchase Order Generation

Two provisions for generating purchase order,

31.1. Quotation purchase order generation and

31.2. Direct Purchase Order generation.

31.1. Quotation purchase order generation

31.1.1. Intended Audience

Purchase Officer.

31.1.2. Usage

This interface enables users to generate purchase order for the approved quotation.

31.1.3. Menu Access

Main Menu >> Purchase Transactions >> Purchase Order

31.1.4. Dependency

Quotation Approval

Quotation Purchase Order Generation

Quotation Bidder Approval List

Quotation Ref No	Quotation Received Date	Supplier Name	Quotation Description
LOY-TR/Apr/012-13 /00002	08-Apr-2013	M/s Antariksh Enterprises (HCL)	Test

Figure 31.1.1

31.1.5. To generate **purchase order for the quotation**, follow these steps, Step1: *Quotations waiting for purchase order generation are listed as shown in Fig 31.1.1.*

Step2: *Click the required quotation; it will open another page which was shown in Fig: 31.1.2. Also the selected supplier of the quotation is displayed. Selected quotation details are displayed in the upper right and the products with amount quoted list are displayed in the bottom.*

Step3: *Enter delivery address.*

Step4: *Enter payment terms.*

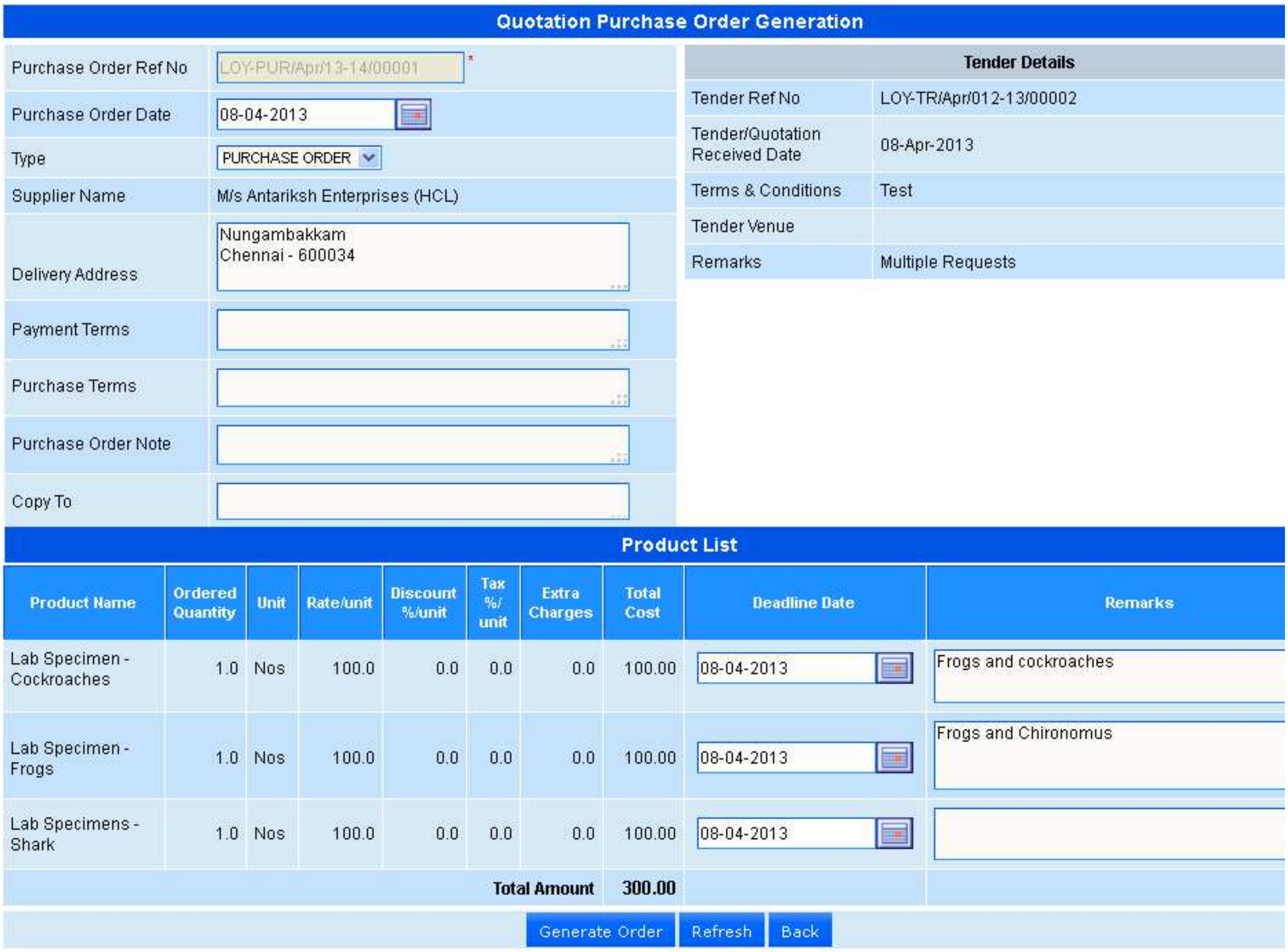
Step5: *Enter Purchase terms.*

Step6: *Enter Purchase Order note and Copy to.*

Step7: *Enter deadline date for each product listed.*

Step8: *Click "Generate Order" button, to generate the purchase order for the quotation selected.*

Step9: *Click "Back" button, to load the initial page as shown in figure 31.1.1.*



Quotation Purchase Order Generation

Purchase Order Ref No	LOY-PUR/Apr/13-14/00001 *
Purchase Order Date	08-04-2013
Type	PURCHASE ORDER
Supplier Name	M/s Antariksh Enterprises (HCL)
Delivery Address	Nungambakkam Chennai - 600034
Payment Terms	
Purchase Terms	
Purchase Order Note	
Copy To	

Tender Details	
Tender Ref No	LOY-TR/Apr/012-13/00002
Tender/Quotation Received Date	08-Apr-2013
Terms & Conditions	Test
Tender Venue	
Remarks	Multiple Requests

Product List

Product Name	Ordered Quantity	Unit	Rate/unit	Discount %/unit	Tax %/ unit	Extra Charges	Total Cost	Deadline Date	Remarks
Lab Specimen - Cockroaches	1.0	Nos	100.0	0.0	0.0	0.0	100.00	08-04-2013	Frogs and cockroaches
Lab Specimen - Frogs	1.0	Nos	100.0	0.0	0.0	0.0	100.00	08-04-2013	Frogs and Chironomus
Lab Specimens - Shark	1.0	Nos	100.0	0.0	0.0	0.0	100.00	08-04-2013	
						Total Amount	300.00		

Generate Order | Refresh | Back

Figure 31.1.2

PURCHASE ORDER

Supplier Details :	P.O. No. : **LOY-PUR/Apr/13-14/00001**
M/s Antariksh Enterprises (HCL)	Date : 08-Apr-2013
Supplier Reference No. : 1321	Invoice To : COLLEGE (AUTONOMOUS)
Quotation Received on : 08-Apr-2013	Delivery At : Nungambakkam Chennai - 600034
Contact Person :	

Sl No	Description	Qty	Unit	Price /Unit [Rs.]	Discount /Unit[%]	Tax /Unit [%]	Extra Charges	Total Price [Rs.]
1	Lab Specimen - Frogs (Frogs and Chironomus)	1.00	Nos	100.00	0.00	0	0	100.00
2	Lab Specimen - Cockroaches (Frogs and cockroaches)	1.00	Nos	100.00	0.00	0	0	100.00
3	Lab Specimens - Shark	1.00	Nos	100.00	0.00	0	0	100.00
							Gross Total	300.00
							Total Purchase Amount	**300.00**

Purchase Order Generated By: Administrator

Acknowledged By **COLLEGE (AUTONOMOUS)**

Supplier Seal,Signature & Date **Authorised Signature & Date**

COPY TO:

Figure 31.1.3

30.2. Direct Purchase Order generation

31.2.1. Intended Audience

Purchase Officer.

31.2.2. Usage

This interface enables users to generate purchase order for the approved purchase requisition.

31.2.3. Menu Access

Main Menu >> Purchase Transactions >> Direct Purchase Order

31.2.4. Dependency

Purchase Requisition Approval

Direct Purchase		
Purchase Requisition Approval List		
Purchase Requisition Code	Purchase Requisition Date	Requesting Division
LOY-PR/Mar/011-12/00007	17-Mar-2012	COLLEGE OFFICE
LOY-PR/Mar/011-12/00010	19-Mar-2012	LIBRARY
LOY-PR/Mar/011-12/00011	21-Mar-2012	STATISTICS
LOY-PR/Mar/011-12/00018	27-Mar-2012	ECONOMICS
LOY-PR/Mar/011-12/00019	27-Mar-2012	SOCIAL WORK

Figure 31.2.1

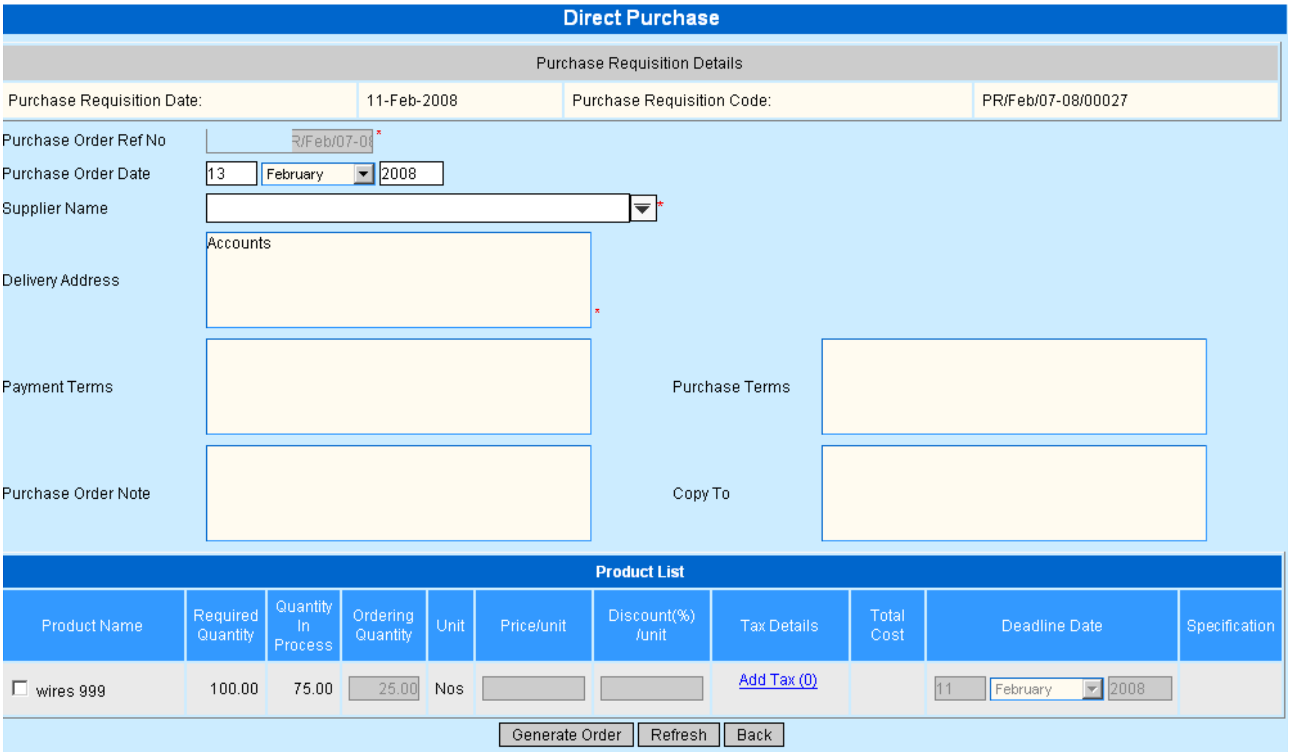


Figure 31.2.2

31.2.5. To generate **direct purchase order**, follow these steps,

Step1: *Purchase Requisition approval list are listed as shown in Fig: 31.2.1.*

Step2: *When click on a row, it will display the page as shown in Fig: 31.2.2.*

Step3: *Purchase requisition details such as requisition date and requisition code are displayed in the top of the page.*

Step4: *Reference no for purchase order is automatically generated.*

Step5: *Select the supplier to whom the products are to be purchased.*

Step6: *Enter delivery address.*

Step7: *Enter payment terms.*

Step8: *Enter Purchase terms.*

Step9: *Enter Purchase Order note and Copy to.*

Step10: *Enter deadline date for each product listed.*

Step11: *Click Generate Order button, to generate the purchase order for the purchase requisition selected.*

Step12: *Click Back button, to load the initial page as shown in figure 31.2.1.*

32.PO Attachment

32.1. Intended Audience

Purchase Department.

32.2. Usage

This interface is used to attach the scanned copy from the supplier purchase order documents.

32.3. Menu Access

Main Menu >>Purchase Transactions >>PO Attachment.

32.4. Dependency

Purchase Order Generation.

Figure 32.1

32.5. To attach a file follow these steps,

Step1: *Select the date range*

Step2: *Click on the button "Generate" to generate the quotation received details from the selected date range.*

Step3: *Click on the icon, to attach file for the selected quotation. And click on the button "Browse" to browse the file. If need to add more files, repeat this step.*

33. Gate Pass Generation

33.1. Intended Audience

Purchase Department.

33.2. Usage

This interface is used to generate gate pass for the purchase order.

33.3. Menu Access

Main Menu >>Purchase Transactions >> Gate Pass Generation.

33.4. Dependency

Quotation/Direct Purchase Order.

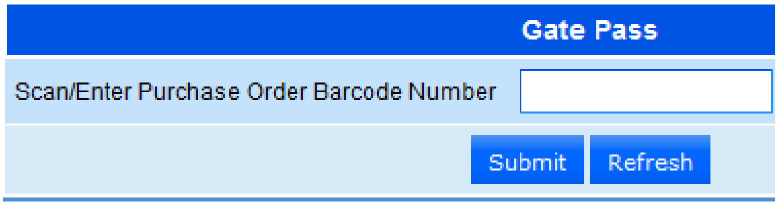
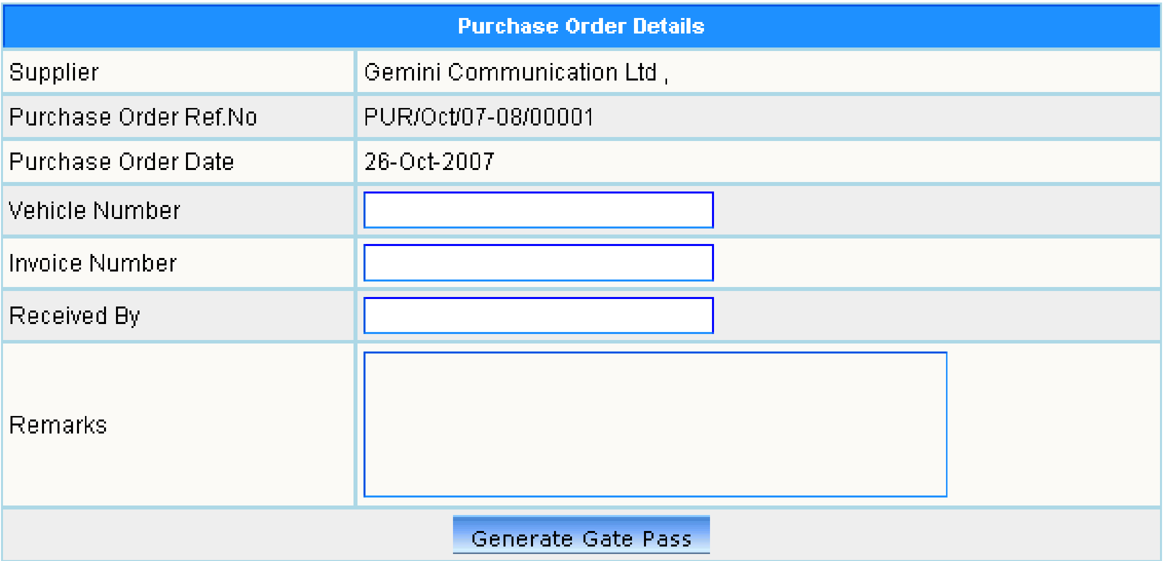


Figure 32.1

33.5. To make a **new entry** follow these steps

Step1: *enter purchase order number.*

Step2: *click on "Submit" button to list purchase order details are shown in figure 32.2.*



Purchase Order Details	
Supplier	Gemini Communication Ltd ,
Purchase Order Ref.No	PUR/Oct/07-08/00001
Purchase Order Date	26-Oct-2007
Vehicle Number	
Invoice Number	
Received By	
Remarks	
Generate Gate Pass	

Figure 33.2.

Step3: if any enter vehicle number, enter invoice number, enter received by and remarks.

Step4: *click on "Generate Gate Pass" to complete gate pass generation.*

34.Goods Receipt Note (GRN)

Following are the two different ways to generate GRN,

34.1. GRN without Gate pass.

34.2. GRN from Gate Pass.

34.1. Goods Receipt Note (GRN without Gate pass)

34.1.1. Intended Audience

Purchase Department, Stores In-charge and Head of the Department.

34.1.2. Usage

This interface is used to record details when goods received from the supplier.

34.1.3. Menu Access

Main Menu >>Purchase Transactions >> Goods Receipt Note.

34.1.4. Dependency

Purchase Order.

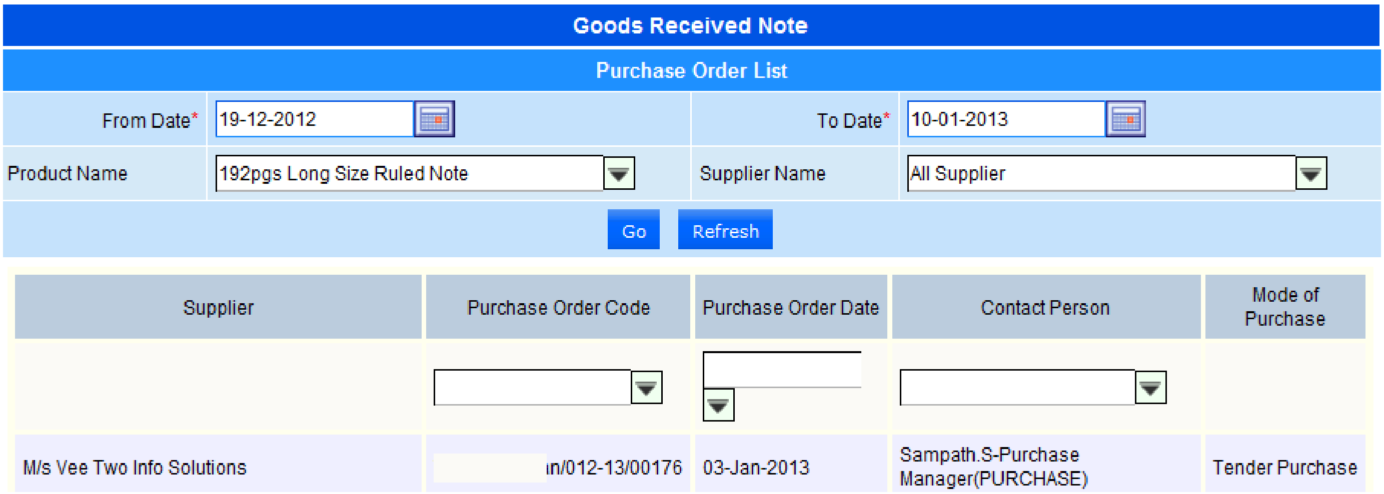


Figure 34.1.1

34.1.5. To select the purchase order, follow these steps,

Step1: *enter from date and to date in which purchase order was issued.*

Step2: *optional filter, select products/goods received.*

Step3: optional filter, select supplier name from whom goods received.

Step4: *click "Go" button to view various purchase order list falling in the selected criteria.*

Step5: select purchase order from list to which goods were delivered.

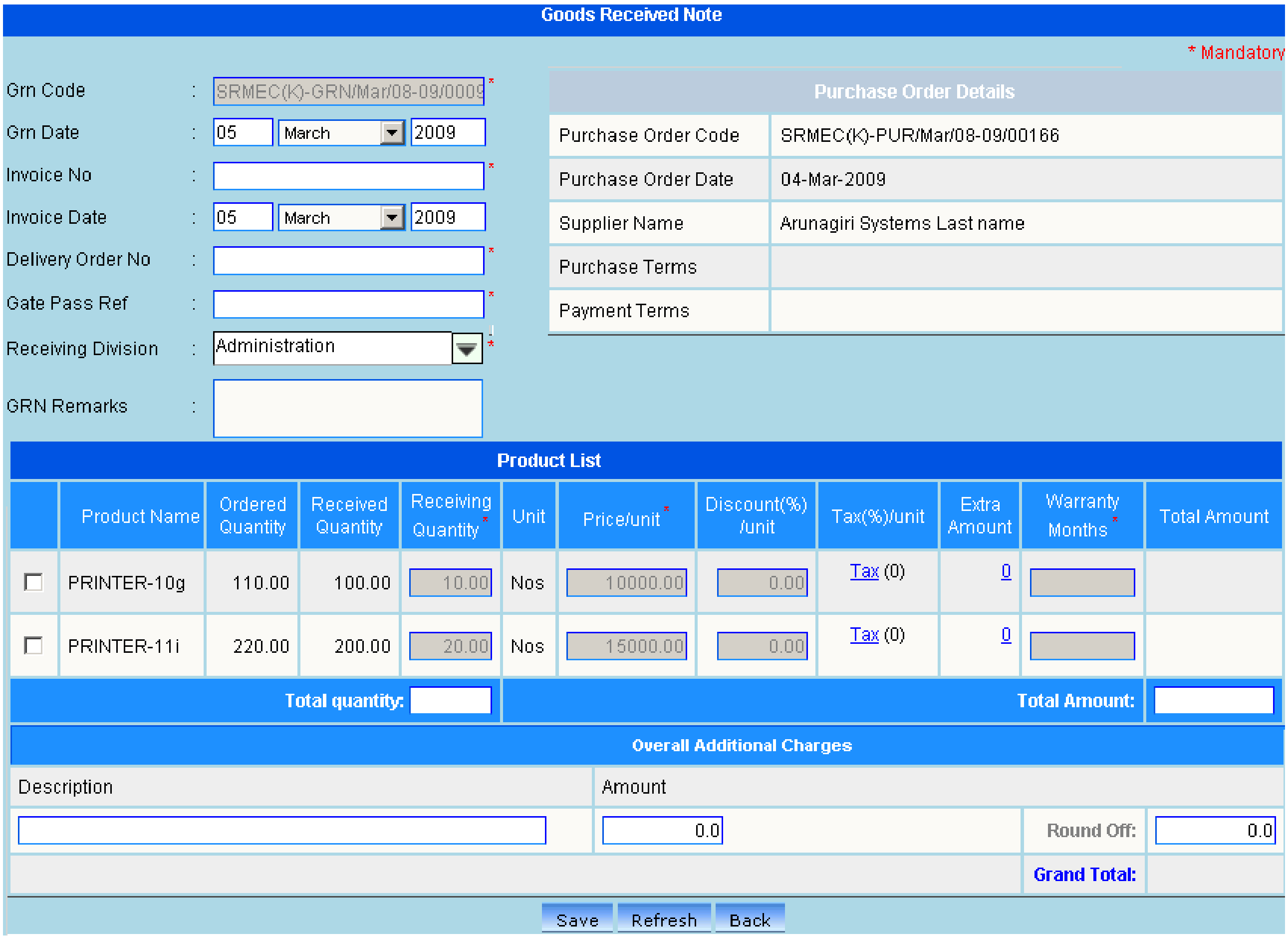


Figure 34.1.2

34.1.6. To make entry of goods received follow these steps,

Step1: Enter invoice number, invoice date and delivery order number of goods received.

Step2: Select receiving division from the list.

Step3: Select the products received and user have option to change receiving quantity, price as received in bill and discount %.

Step4: enter the warranty in months.

Step5: *click "save" button to complete the goods received process.*

34.2. GRN from Gate Pass

34.2.1. Intended Audience

Purchase Department, Stores In-charge and Head of the Department.

34.2.2. Usage

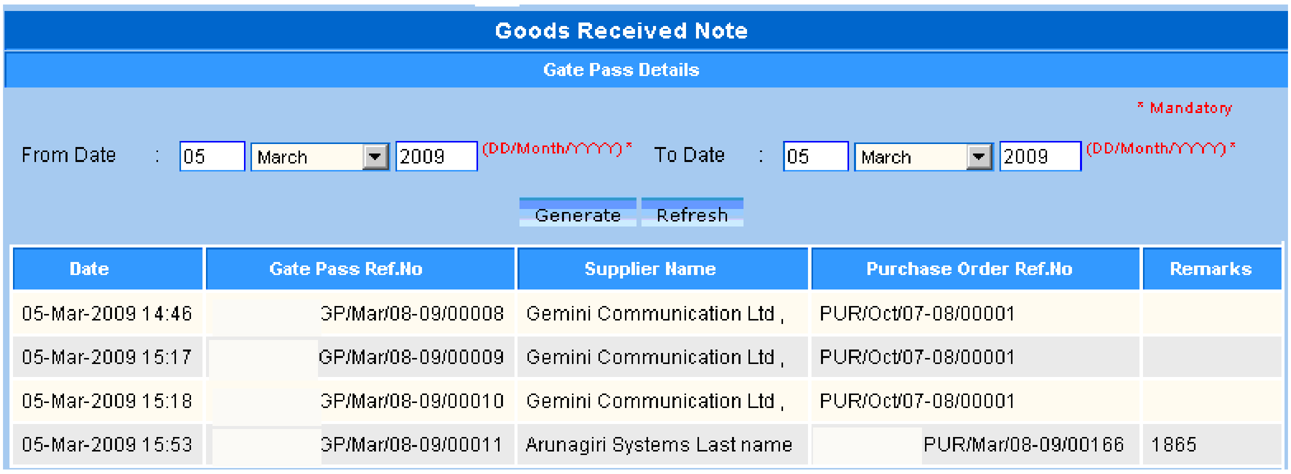
This interface is used to record details when goods received from the supplier.

34.2.3. Menu Access

Main Menu >>Purchase Transactions >> Goods Received Note.

34.2.4. Dependency

Gate Pass.


Goods Received Note
Gate Pass Details
* Mandatory
From Date : 05 March 2009 (DD/Month/YYYY)* To Date : 05 March 2009 (DD/Month/YYYY)*
Generate Refresh

Date	Gate Pass Ref.No	Supplier Name	Purchase Order Ref.No	Remarks
05-Mar-2009 14:46	GP/Mar/08-09/00008	Gemini Communication Ltd ,	PUR/Oct/07-08/00001	
05-Mar-2009 15:17	GP/Mar/08-09/00009	Gemini Communication Ltd ,	PUR/Oct/07-08/00001	
05-Mar-2009 15:18	GP/Mar/08-09/00010	Gemini Communication Ltd ,	PUR/Oct/07-08/00001	
05-Mar-2009 15:53	GP/Mar/08-09/00011	Arunagiri Systems Last name	PUR/Mar/08-09/00166	1865

Figure 34.2.1

34.2.7. To select gate pass follow these steps,

Step1: *enter from date and to date in which gate pass was generated.*

Step2: *click "Generate" button to view gate pass list falling in the selected criteria.*

Step3: *select gate pass from list.*

Step4: It would display page as shown in Figure 34.2.1.

34.2.8. To make entry of goods received follow these steps,

Step1: Enter invoice number, invoice date and delivery order number of goods received.

Step2: Select receiving division from the list.

Step3: Select the products received and user have option to change receiving quantity, price as received in bill and discount %.

Step4: enter the warranty in months.

Step5: *click "save" button to complete the goods received process.*

35.GRN Attachment

35.1. Intended Audience

Purchase Department.

35.2. Usage

This interface is used to attach the scanned copy from the supplier invoice and other documents.

35.3. Menu Access

Main Menu >>Purchase Transactions >>GRN Attachment.

35.4. Dependency

Goods Received Note.

Figure 35.1

35.5. To attach a file follow these steps,

Step1: *Select the date range*

Step2: *Click on the button "Generate" to generate the quotation received details from the selected date range.*

Step3: *Click on the icon, to attach file for the selected quotation. And click on the button "Browse" to browse the file. If need to add more files, repeat this step.*

36.Stock Conversion

36.1. Intended Audience

Purchase Department.

36.2. Usage

This interface is used to convert the stock into a separate stock.

36.3. Menu Access

Main Menu >>Purchase Transactions >>Stock Conversion.

36.4. Dependency

Goods Received Note.

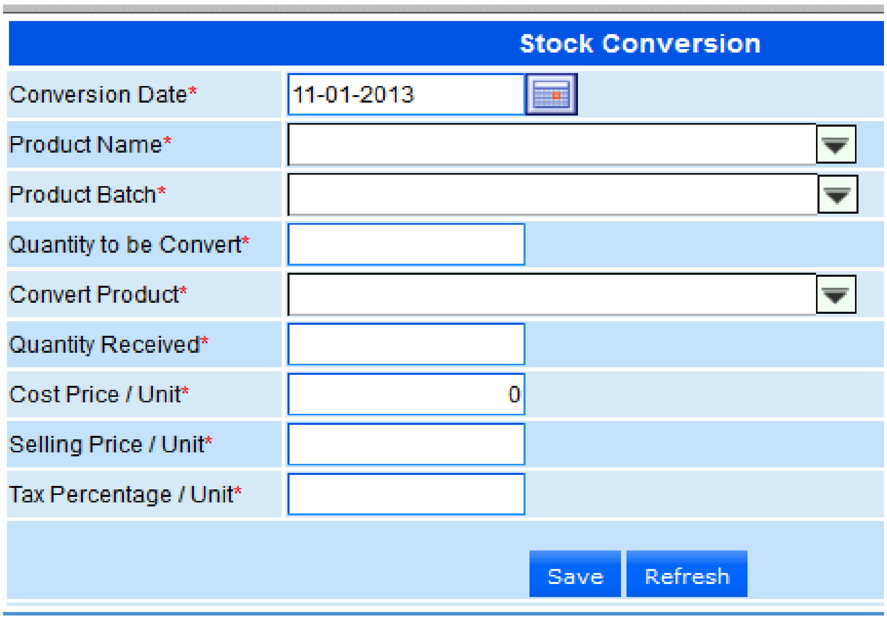


Figure 36.1

36.5. To convert the stock follows these steps,

Step1: *Select the conversion date*

Step2: *Select the product from the drop-down list.*

Step3: *Select the stock from the drop-down list.*

Step4: *Enter the quantity to be converted.*

Step5: *Select the product converted to from the drop-down list.*

Step6: *Enter the cost price per unit.*

Step7: *Enter the selling price per unit.*

Step8: *Enter the tax percentage per unit.*

Step9: Click on the “Save” button to save the stock.

37.Goods Issue

37.1. Intended Audience

Purchase Department

37.2. Usage

This interface is used to issue the goods into requested division.

37.3. Menu Access

Main Menu >>Purchase Transactions >> Goods Issue.

37.4. Dependency

Goods Receipt Note.

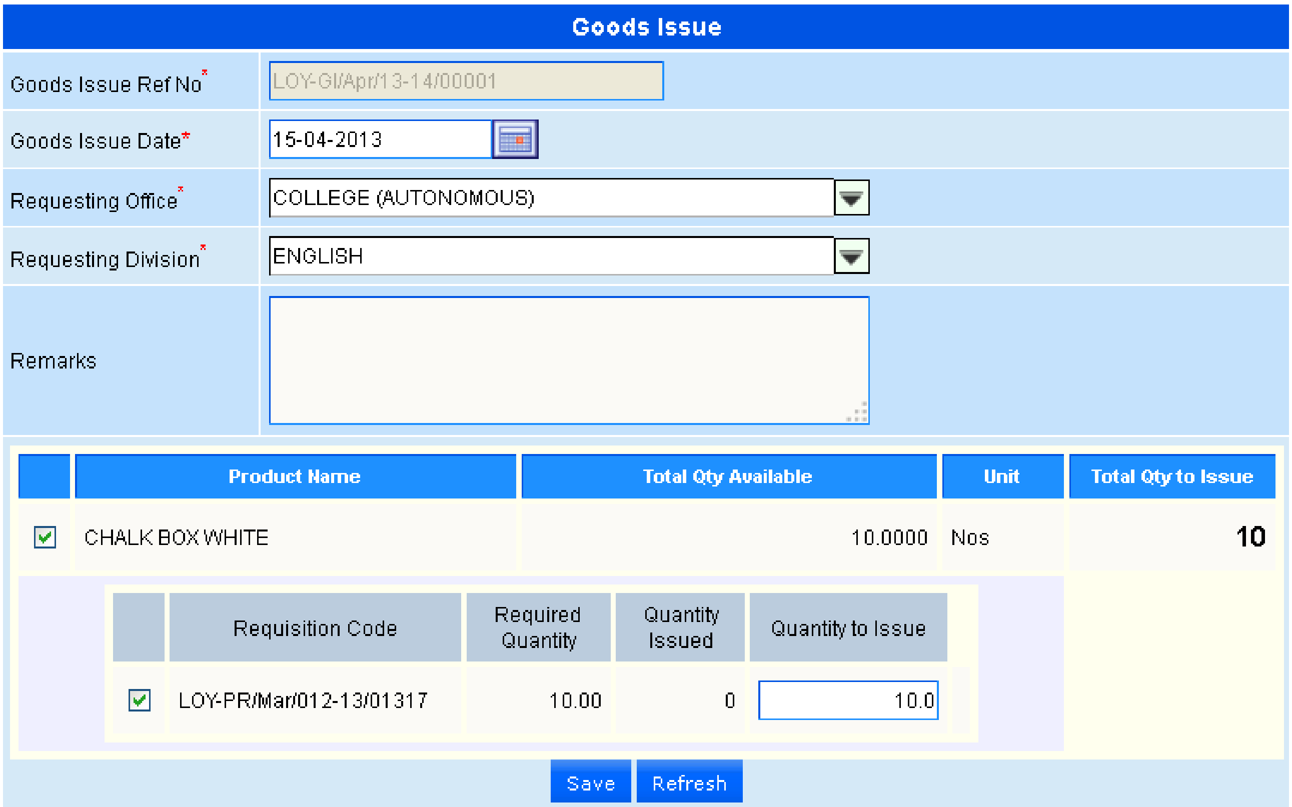


Figure 38.1

38.5. To make a **new entry** follow these steps,

Step1: *enter goods issue date.*

Step2: *select requesting office.*

Step3: *select requesting division, product list would appear.*

Step4: if any, enter remarks.

Step4: *select product*.

Step5: User can enter number of quantity to issue. Quantity should not be less than 1 and quantity cannot be greater than required quantity

Step6: *click "save" button to complete the goods issue process.*

39.Posting to Accounts

39.1. Intended Audience

Accounts Officer.

39.2. Usage

This interface enables users to post Purchase Order Journal for the amount entered to the accounts module.

39.3. Menu Access

Main Menu >> Purchase Transactions >> Posting to Accounts

39.4. Dependency

Goods Received Note.

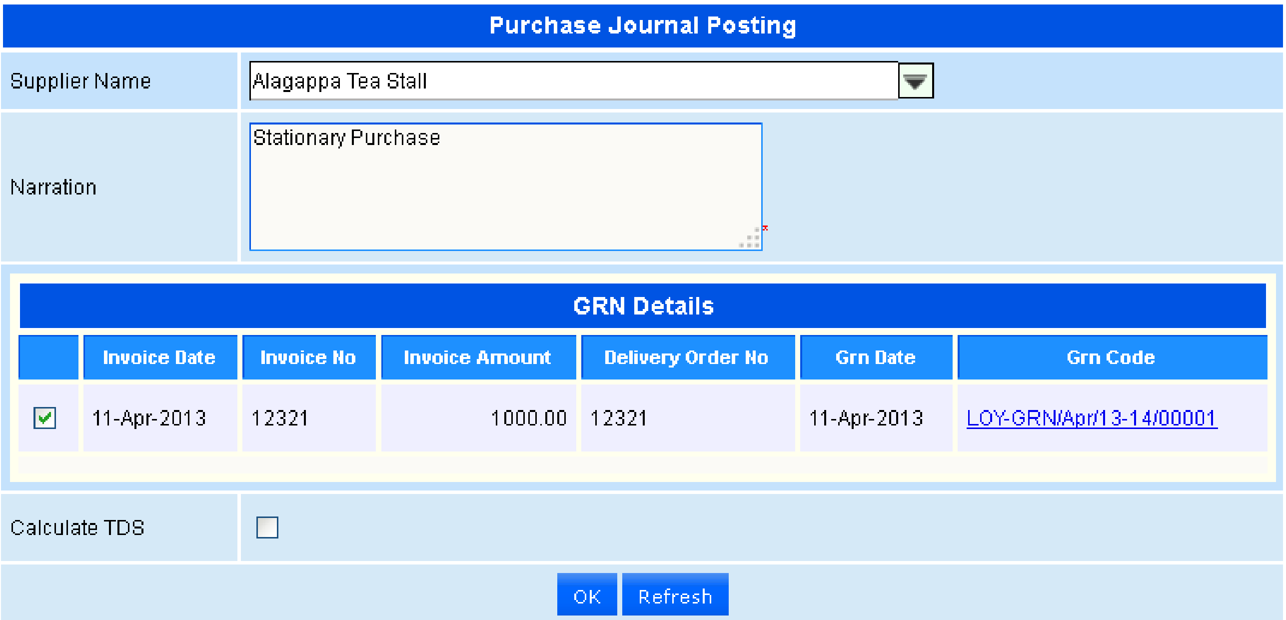


Figure 39.1.

39.5. To Post the Purchased amount to accounts, follow these steps,

Step1: *Select supplier name, it lists goods received notes.*

Step2: *enter narration.*

Step3: *select goods received note.*

Step6: *click on link to view the Goods Received Note details.*

Step7: *click "ok" button, it loads the page as shown in Fig: 39.2.*

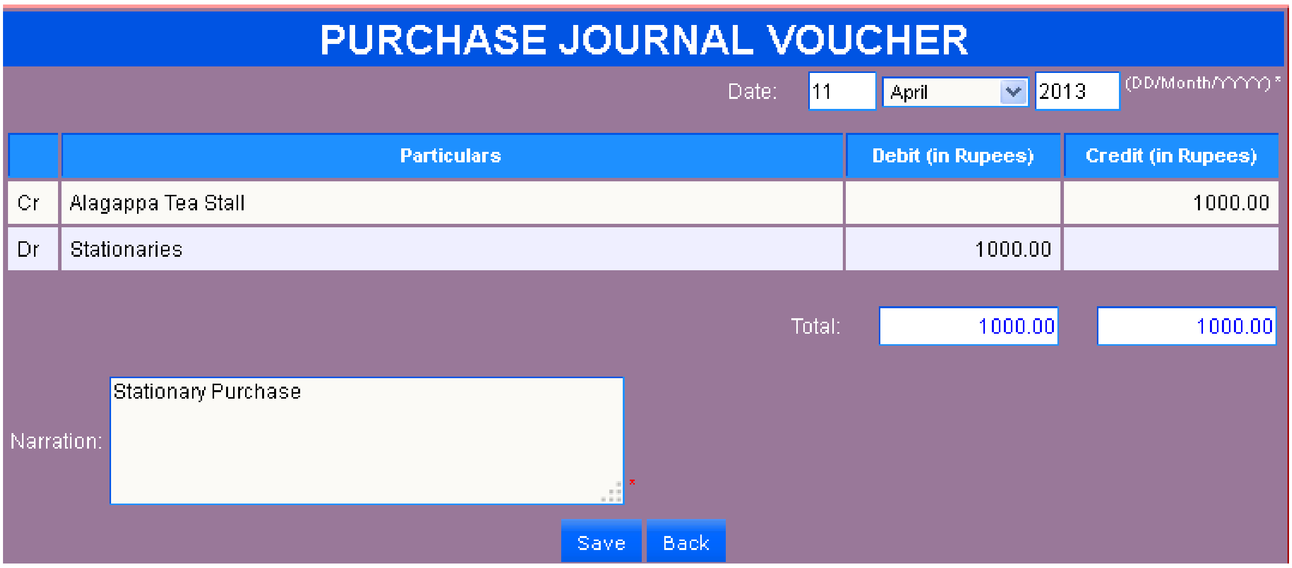


Figure 39.2

Step8. Click' *save' button, to complete the journal posting details.*

Step9: *click 'Back' button, initial page would load are shown in figure 39.1.*

40.Consumable Spent

40.1. Intended Audience

Purchase department, department coordinators.

40.2. Usage

This interface enables users to enter the consumable products in quantity. After completed this entry, and then automatically reduced stock for entered products of the selected division.

40.3. Menu Access

Main Menu >> Purchase Transactions >> Consumable Spent

40.4. Dependency

Goods Issue.

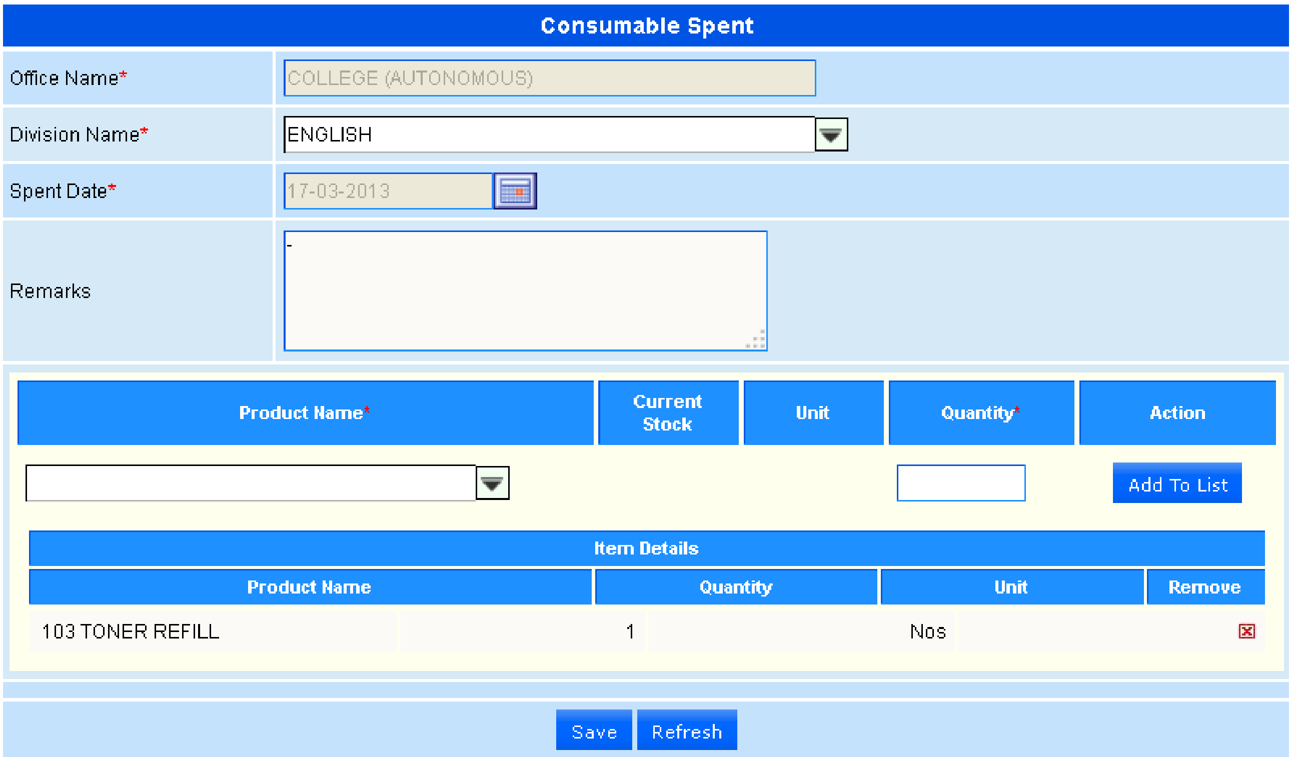


Figure 40.1

40.5. To make consumables spent entry follows these steps,

Step1: *Select division name*

Step2: *Select the spent date.*

Step3: *Enter the remarks.*

Step4: *Select the product from the drop-down list.*

Step5: *Enter the quantity.*

Step6: *Click on the button "Add To List" to add the selected product into the list. If add more than one products, repeat the steps from 4 to 6.*

Step7: *Click on the button "Save" to save the product consumable details.*

41.Stock Transfer Request

41.1. Intended Audience

Purchase department, department coordinators.

41.2. Usage

This interface enables users to make stock transfer request for their department to the other departments.

41.3. Menu Access

Main Menu >> Purchase Transactions >> Stock Transfer Request

41.4. Dependency

Goods Issue.

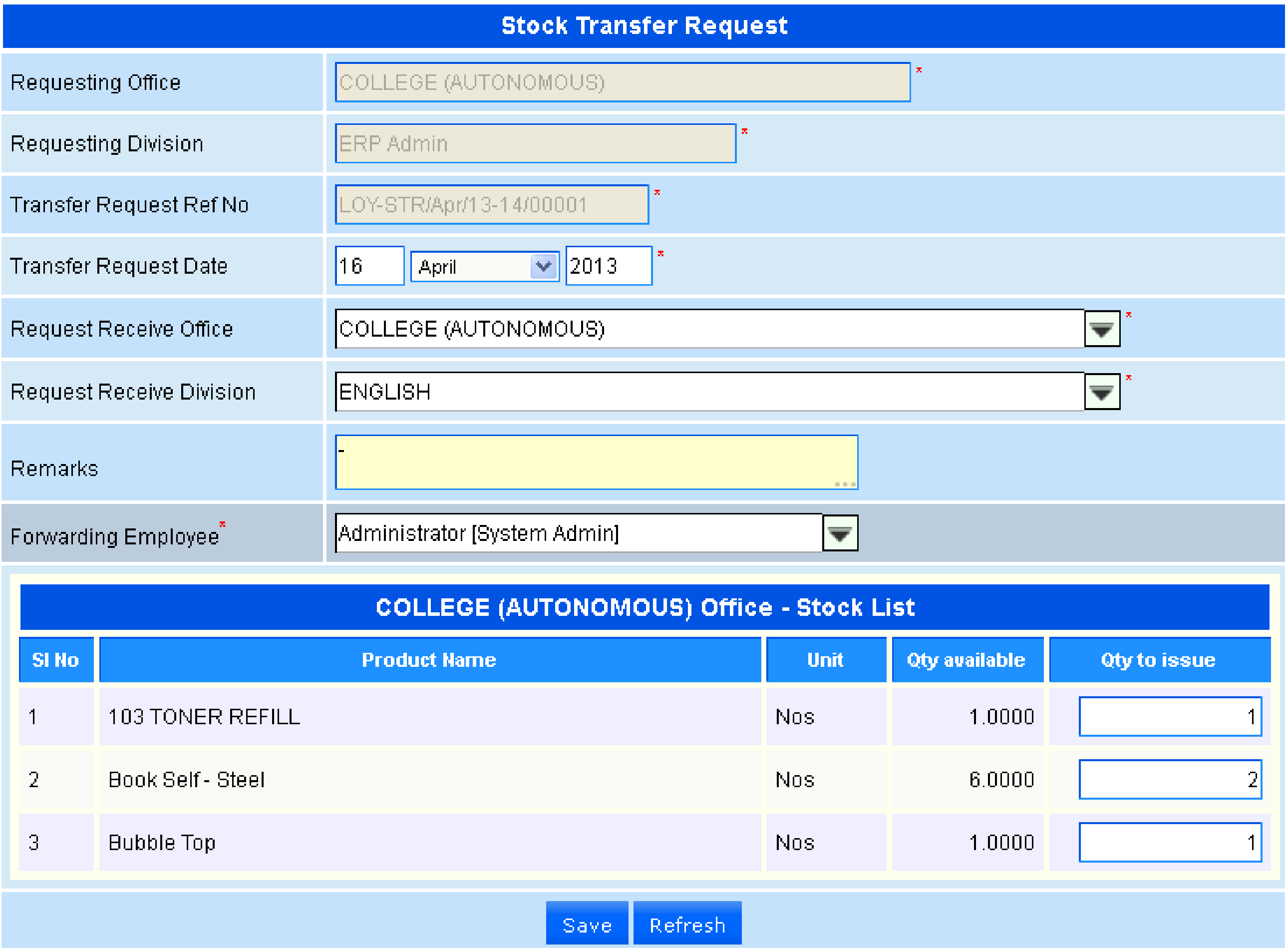


Figure 41.1

41.5. To make stock transfer request follows these steps,

Step1: *Select the transfer request date.*

Step2: *Select the requested office from the drop-down list.*

Step3: *Select the requested division from the drop-down list.*

Step4: *Enter the remarks.*

Step5: *Select forwarding employee.*

Step6: *Enter the quantity to be transferred in corresponding products.*

Step7: *Click on the button "Save" to save the stock transfer request.*

42. Stock Transfer Request Approval

42.1. Intended Audience

Department coordinators.

42.2. Usage

This interface enables users to approve the stock transfer request by received department.

42.3. Menu Access

Main Menu >> Purchase Transactions >> Stock Transfer Request Approval

42.4. Dependency

Stock Transfer Request.

42.5. To make stock transfer request approval follows these steps,

Step1: *List of transfer requests waiting for approval will be listed (as shown in Figure 42.1)*

Step2: *Click on the button "View" to view the transfer request details for the selected stock transfer request (as shown in figure 42.2).*

Step3: *Click on the button "Approve" to approve the stock transfer request.*

Step4: *Click on the button "Reject" to reject the stock transfer request.*

Transfer Request Approval

Transfer Requisition List

Transfer Req. Code	Request Date	Requesting Division	Receiving Division	Requested User	Forwarded to	Remarks	
LOY-STR/Apr/13-14/00001	16-04-2013	ERP Admin	ENGLISH	Administrator	Administrator	-	Approve Reject View

Figure 42.1

Transfer Request Details

Transfer Request Code: LOY-STR/Apr/13-14/00001

Sl No	Product Name	Quantity	✗
1	103 TONER REFILL	1.00	Nos
2	Book Self - Steel	2.00	Nos
3	Bubble Top	1.00	Nos
4	Computer Table	1.00	Nos

Figure 42.2

43. Stock Transfer

43.1. Intended Audience

Department coordinators.

43.2. Usage

This interface enables users to transfer the stock to the requested department.

43.3. Menu Access

Main Menu >> Purchase Transactions >> Stock Transfer

43.4. Dependency

Stock Transfer Request Approval.

43.5. To make stock transfer follows these steps,

Step1: *List of transfer requests waiting for approval will be listed (as shown in Figure 43.1)*

Step2: *Selected stock transfer request (as shown in figure 43.2).*

Step3: *Select the transfer date.*

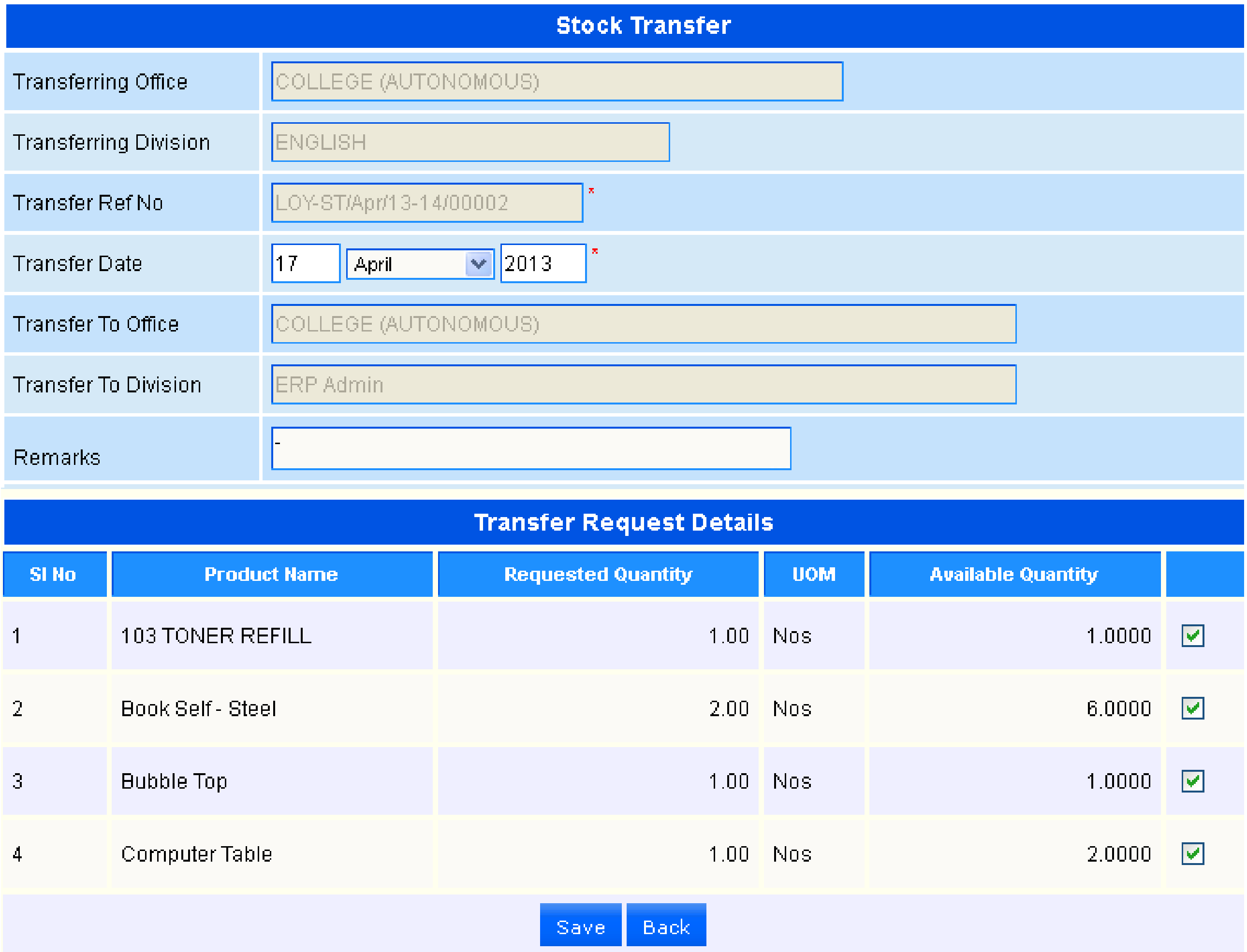
Step4: *Enter the remarks.*

Step5: *Select the transferred products from the list.*

Step6: *Click on the button "Save" to transfer the stock.*

Stock Transfer						
Transfer Requisition Approval List						
Transfer Req. Code	Request Date	Requesting Division	Receiving Division	Requested User	Approved By	Remarks
LOY-STR/Apr/13-14/00001	16-04-2013	ERP Admin	ENGLISH	Administrator	Administrator	-

Figure 43.1



Stock Transfer

Transferring Office	COLLEGE (AUTONOMOUS)
Transferring Division	ENGLISH
Transfer Ref No	LOY-ST/Apr/13-14/00002 *
Transfer Date	17 April 2013 *
Transfer To Office	COLLEGE (AUTONOMOUS)
Transfer To Division	ERP Admin
Remarks	-

Transfer Request Details

Sl No	Product Name	Requested Quantity	UOM	Available Quantity	
1	103 TONER REFILL	1.00	Nos	1.0000	☑
2	Book Self - Steel	2.00	Nos	6.0000	☑
3	Bubble Top	1.00	Nos	1.0000	☑
4	Computer Table	1.00	Nos	2.0000	☑

Save Back

Figure 43.2

44. Stock Transfer Acknowledge

44.1. Intended Audience

Department coordinators.

44.2. Usage

This interface enables users to acknowledge the stock transfer by the requested department.

44.3. Menu Access

Main Menu >> Purchase Transactions >> Stock Transfer Acknowledge

44.4. Dependency

Stock Transfer.

44.5. To acknowledge the stock transfer follows these steps, Step1: *List of transfer requests waiting for approval will be listed (as shown in Figure 44.1)*

Step2: *Click on the button "View" to view the transfer details of the selected transfer request. (as shown in figure 44.2).*

Step3: *Click on the button "Approve" to approve that stock transfer.*

Step4: *Click on the button "Reject" to reject the stock transfer request.*

Stock Transfer Acknowledge							
Transfer List							
Transfer Ref. No	Transfer Date	Issuing Division	Receiving Division	Remarks	Transfer Req. Ref. Code	Request Approved By	
LOY-ST/Apr/13-14/00002	17-04-2013	ENGLISH	ERP Admin	-	LOY-STR/Apr/13-14/00001	Administrator	Approve Reject View

Figure 44.1

Transfer Details				
Transfer Ref. Code: LOY-ST/Apr/13-14/00002				
Sl No	Product Name	Quantity	Amount / Unit	Net Total
1	103 TONER REFILL	1.00 Nos	787.5000	787.50
2	Computer Table	1.00 Nos	1889.2500	1889.25
3	Book Self - Steel	2.00 Nos	6930.0000	13860.00
4	Bubble Top	1.00 Nos	231.0000	231.00
	Total (Rs.)	**5.0**		**16767.75**

Figure 44.2

45. Purchase Return

45.1. Intended Audience

Purchase Department.

45.2. Usage

This interface is used to return the goods to the supplier.

45.3. Menu Access

Main Menu >>Purchase Transactions >>Purchase Return.

45.4. Dependency

Goods Issue.

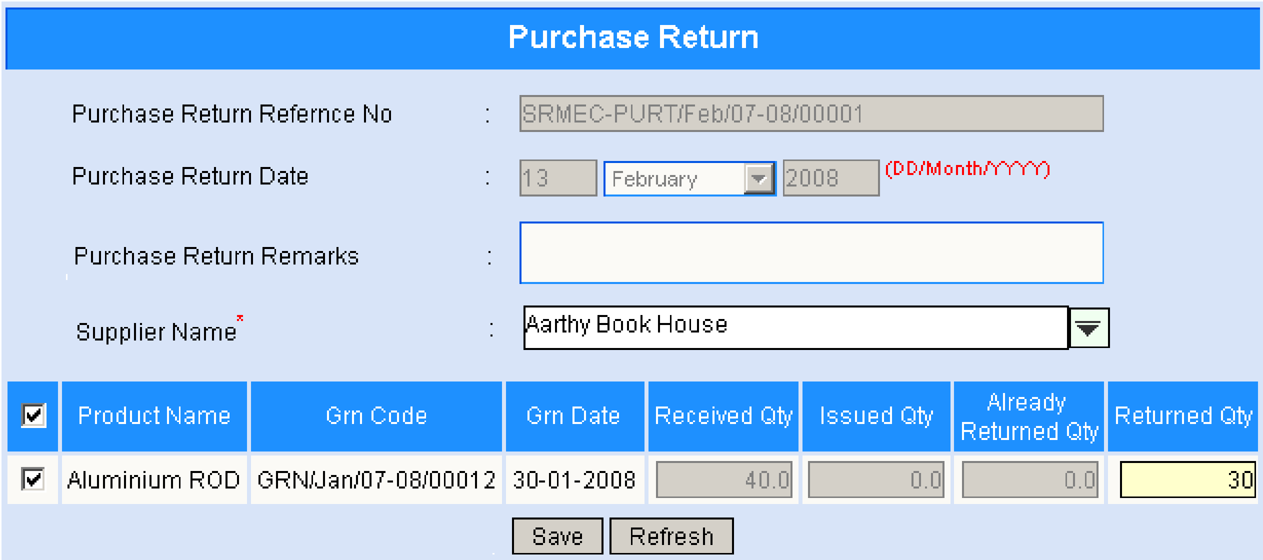


Figure 45.1.

45.5. To make a **new entry** follow these steps,

Step1: *if any, enter purchase return remarks.*

Step2: *select supplier name.*

Step3: *select product, enter quantity to be returned.*

Step4: *click "save" button to save the purchase return entry.*

46. Purchase Return Approval

46.1. Intended Audience

Purchase Department.

46.2. Usage

This interface is used to approve the purchase return into e-Varsity.

46.3. Menu Access

Main Menu >>Purchase Transactions >>Purchase Return Approval.

46.4. Dependency

Purchase Return.

Purchase Return Approval			
Purchase Return List			
Purchase Return Ref No	Return Date	Return Remarks	
SRMEC-PURT/Feb/07-08/00001	13-02-2008		Approve Reject View

Figure 46.1

46.5. To Approve the Purchase Return follow these steps,

Step1: *click "approve" button to approve the purchase return*.

Step2: *click "reject" button to reject purchase return*.

Step3: *click "view" button to view the purchase return details refer figure 46.2*

Purchase Return Details	
Purchase Return Ref No :	SRMEC-PURT/Feb/07-08/00001
Product Name	Returned Quantity
Aluminium ROD	30.00
Back	

Figure 46.2

47. Purchase Request Cancellation

47.1. Intended Audience

Purchase Officer.

47.2. Usage

This interface has the provision to cancel the generated purchase request.

47.3. Menu Access

Main Menu >> Purchase Transactions >> Cancellation>> Purchase Request Cancellation.

47.4. Dependency

Purchase Request.

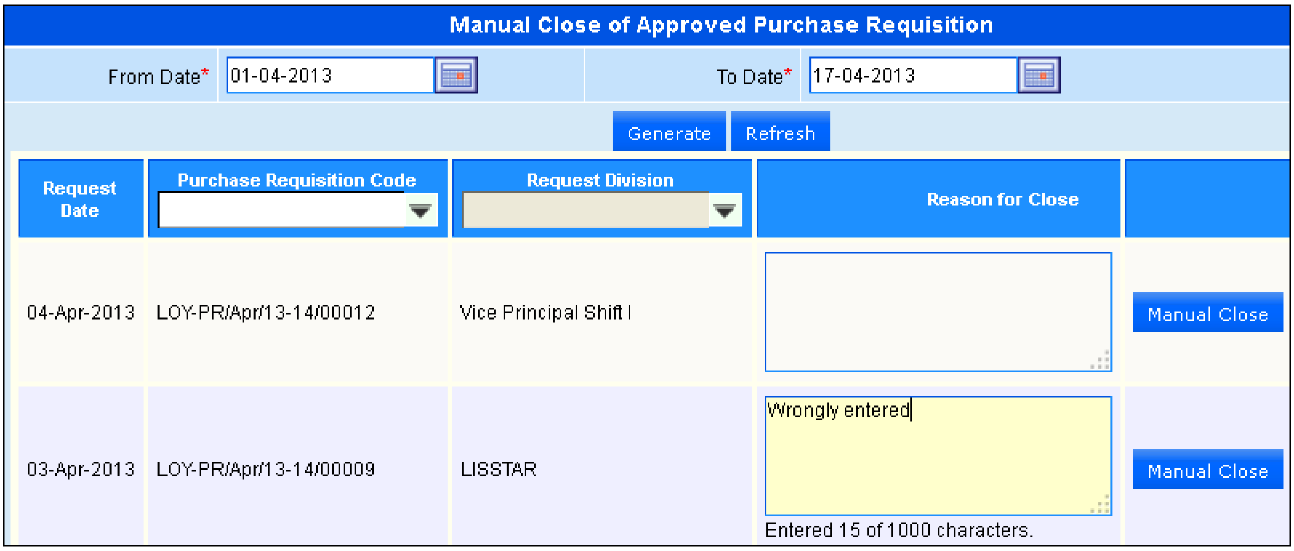


Figure 47.1

47.5 To cancel the purchase requisition, follow these steps,

Step1*: Enter From date and To date, default current date*

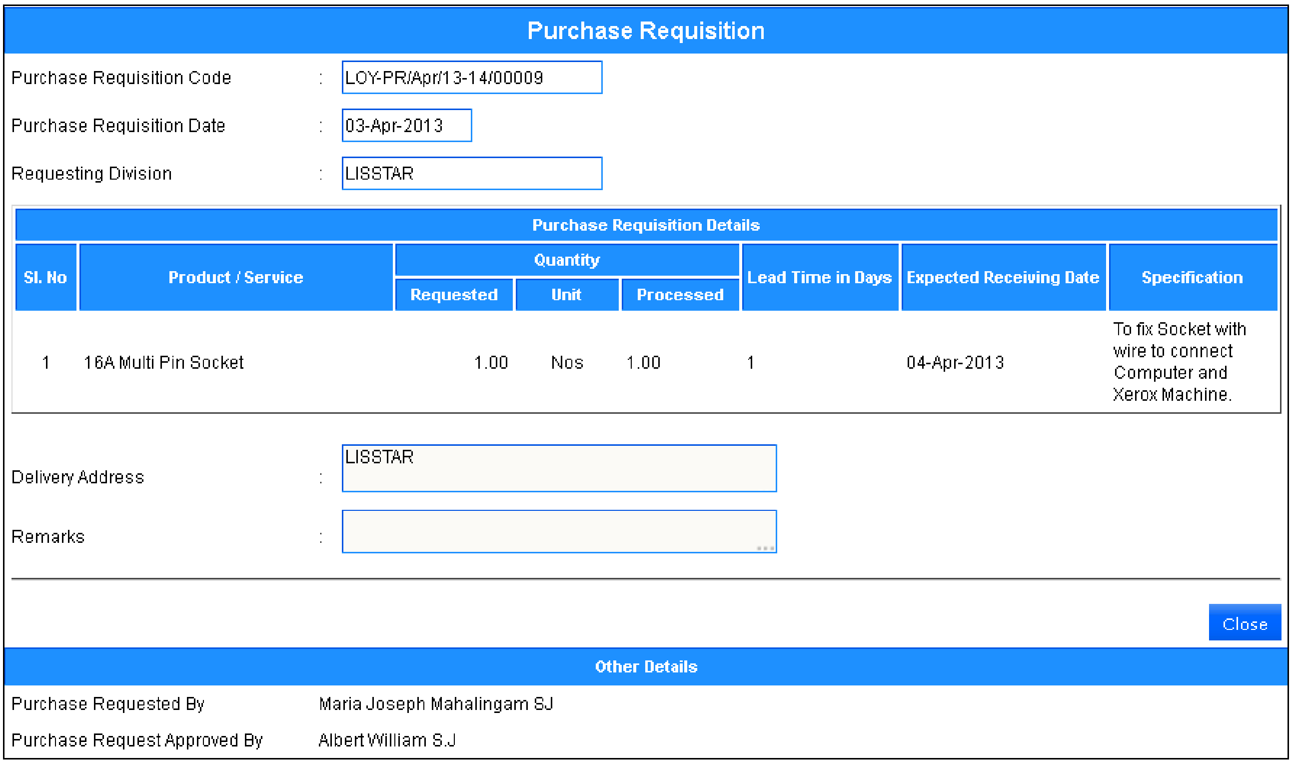
Step2: *Click 'Generate" button, it would list purchase requisition generated for the specified period.*

Step3: *optional filters, select purchase request code.*

Step4: *Click on purchase requisition to view purchase requisition product details are shown in figure 47.2.*

Step5: if any, enter reason for close.

Step6: *Click 'Manual Close' button, to cancel the purchase requisition.*



Purchase Requisition

Purchase Requisition Code : LOY-PR/Apr/13-14/00009

Purchase Requisition Date : 03-Apr-2013

Requesting Division : LISSTAR

Purchase Requisition Details

Sl. No	Product / Service	Quantity			Lead Time in Days	Expected Receiving Date	Specification
		Requested	Unit	Processed			
1	16A Multi Pin Socket	1.00	Nos	1.00	1	04-Apr-2013	To fix Socket with wire to connect Computer and Xerox Machine.

Delivery Address : LISSTAR

Remarks :

Close

Other Details

Purchase Requested By Maria Joseph Mahalingam SJ

Purchase Request Approved By Albert William S.J

Figure 47.2

48. Quotation Cancellation

48.1. Intended Audience

Purchase Officer.

48.2. Usage

This interface has the provision to cancel the Quotations.

48.3. Menu Access

Main Menu >> Purchase Transactions >> Quotation Cancellation.

48.4. Dependency

Quotation Initiation/Quotation Received/Quotation Finalization /Quotation Approval.

48.5. To cancel the quotation, follow these steps,

Step1: *Enter From date and To date, default current date*

Step2: *Click 'Generate" button, it would list quotations generated for the specified period.*

Step3: *optional filters, select quotation reference number, authority.*

Step4: *Click on quotation to view quotation details are shown in figure: 48.2.*

Step5: if any, enter reason.

Step6: *Click 'Manual Close' button, to cancel the quotation.*

Manual Close of Quotation

From Date*	01-04-2013	To Date*	17-04-2013

Generate Refresh

Quotation Date	Quotation Reference No	Authority	Status	Reason	
17-Apr-2013	LOY-TR/Apr/13-14/00001	Administrator	Quotation Initiation	wrongly generated Entered 17 of 1000 characters.	Manual Close

Figure 48.1

Quotation Details

Quotation Ref No	LOY-TR/Apr/13-14/00001	**Quotation Opening Date and Time**	17-Apr-2013 / 01:14 PM
Quotation Date	17-Apr-2013	**Quotation Closing Date and Time**	17-Apr-2013 / 01:14 PM
Opening Authority	Administrator	**Quotation Venue**	
Quotation Status	**Quotation Initiation**	**Quotation Remarks**	Multiple Requests

Quotation Details

Sl. No	Product Name	Quantity	Unit
1	A4 JK COPIER PAPER	4.00	Nos
2	BOX FILE STEEL CLIP	12.00	Nos
3	CAT-5 NETWORKING CABLE BOX	1.00	Nos
4	SIGNATURE PEN ALL COLOUR	8.00	Nos
5	VOUCHER BOX FILE	24.00	Nos

Figure 48.2

49. Purchase Order Cancellation

49.1. Intended Audience

Purchase Officer.

49.2. Usage

This interface has the provision to cancel the generated purchase order.

49.3. Menu Access

Main Menu >> Purchase Transactions >> Purchase Order Cancellation.

49.4. Dependency

Purchase Order.

Purchase Order Cancellation						
Purchase Order Date	**Purchase Order Code**	**Supplier Name**	**Delivery Address**	**Purchase Terms**	**Payment Terms**	**Purchase Mode**
17-Mar-2012	LOY-PUR/Mar /011-12/00072	M/s INIYA ENTERPRISES	COMPUTER SCIENCE NON TEACHING			Direct Purchase
21-Jun-2012	LOY-PUR/Jun /012-13/00023	M/s ELECRTICALS N ELECTRICALS	Secretary Office			Direct Purchase
25-Jun-2012	LOY-PUR/Jun /012-13/00038	M/s B.GANDHI Interior Work	Server Room			Direct Purchase
29-Jun-2012	LOY-PUR/Jun /012-13/00040	M/s NEW BURMA PAPER AND STATIONERY STORES	ENGLISH			Direct Purchase
03-Jul-2012	LOY-PUR/Jul/012-13 /00047	M/s SETHIA INFOTECH	English			Direct Purchase

Figure 49.1

Purchase Order Cancellation	
Purchase Order Ref. No.	LOY-PUR/Mar/011-12/00072
Purchase order Date	17-Mar-2012
Supplier Name	M/s INIYA ENTERPRISES
Delivery Address	COMPUTER SCIENCE NON TEACHING
Payment Terms	
Purchase Terms	
Purchase Order Note	
Copy To	

☐	**Product Name**	**Ordered Quantity**	**Received Quantity**	**Already Canceled Quantity**	**Cancel Quantity**	**Price / Unit**	**Tax (%)/Unit**	**Discount / Unit**
☐	Lab Specimen - Cockroaches	1.00	0	0	1.00	100.00	0	0.00
☐	Lab Specimen - Frogs	1.00	0	0	1.00	100.00	0	0.00
☐	Lab Specimens - Shark	1.00	0	0	1.00	100.00	0	0.00

Cancel Purchase Order | Back

Figure 49.2

49.5. To cancel the generated purchase order, follow these steps,

Step1: *Purchase order generated for the quotations are listed as shown in figure 49.1.*

Step2: *Click 'View' button to view the product details of the selected purchase order. The* *purchase order product details are shown in fig: 49.2*

Step3: Select the products to be canceled.

Step4: *Click 'Cancel Purchase Order' button, to cancel the purchase order selected.*

50. GRN Cancellation

50.1. Intended Audience

Purchase Officer.

50.2. Usage

This interface has the provision to cancel the goods received note.

50.3. Menu Access

Main Menu >> Purchase Transactions >> GRN Cancellation.

50.4. Dependency

Goods Receipt Note.

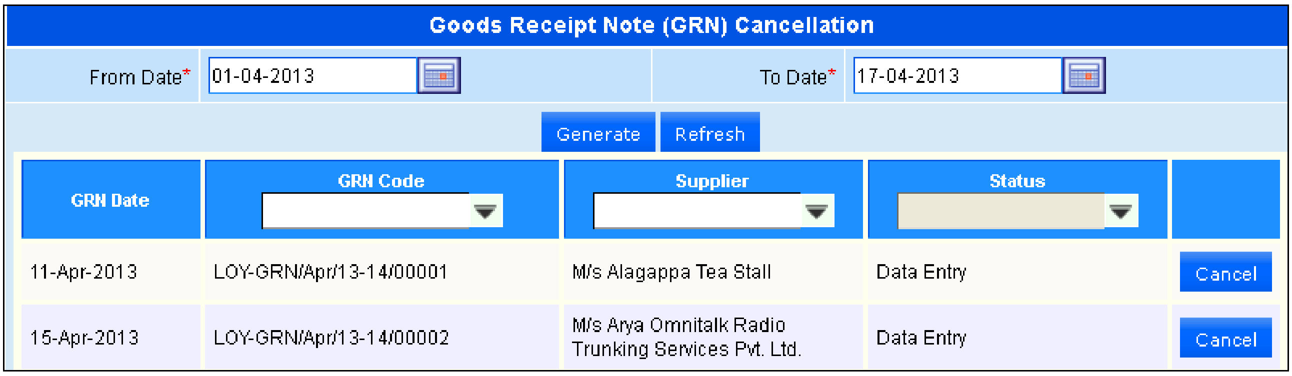


Figure 50.1

50.2. To cancel the GRN, follow these steps,

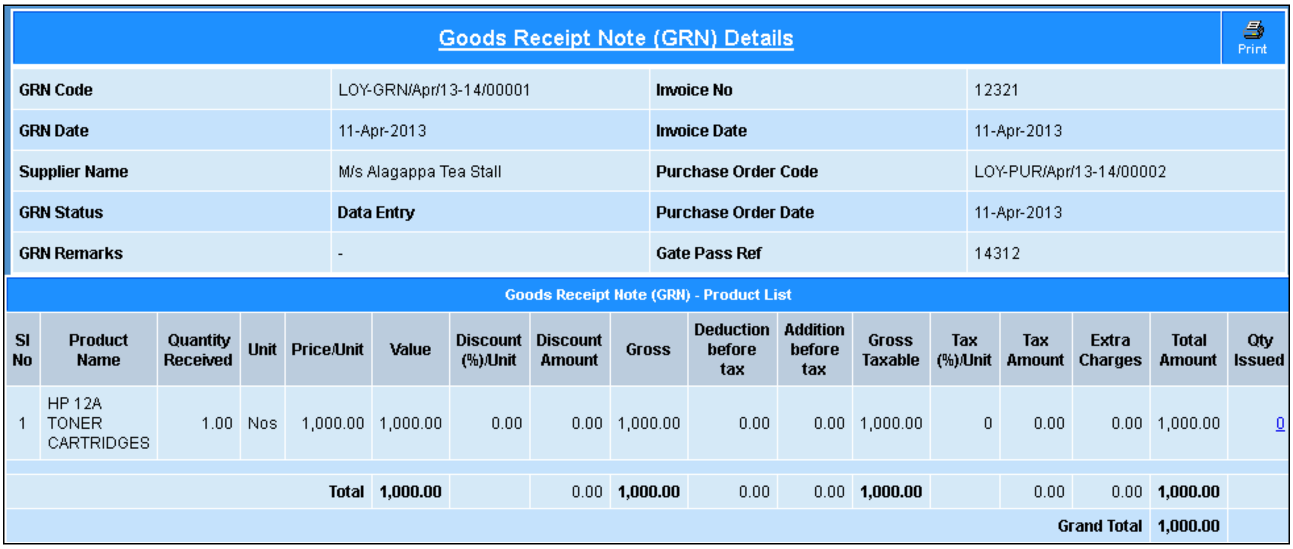
Step1*: Enter From date and To date, default current date*

Step2: *Click 'Generate" button, it would list goods receipt notes generated for the specified period.*

Step3: *optional filters, select GRN code, suppliers, status.*

Step4: *Click on GRN to view GRN details are shown in figure: 50.2*

Step5: *Click 'Cancel' button, to cancel the GRN.*



Goods Receipt Note (GRN) Details			
GRN Code	LOY-GRN/Apr/13-14/00001	Invoice No	12321
GRN Date	11-Apr-2013	Invoice Date	11-Apr-2013
Supplier Name	M/s Alagappa Tea Stall	Purchase Order Code	LOY-PUR/Apr/13-14/00002
GRN Status	Data Entry	Purchase Order Date	11-Apr-2013
GRN Remarks	-	Gate Pass Ref	14312

Goods Receipt Note (GRN) - Product List

Sl No	Product Name	Quantity Received	Unit	Price/Unit	Value	Discount (%)/Unit	Discount Amount	Gross	Deduction before tax	Addition before tax	Gross Taxable	Tax (%)/Unit	Tax Amount	Extra Charges	Total Amount	Qty Issued
1	HP 12A TONER CARTRIDGES	1.00	Nos	1,000.00	1,000.00	0.00	0.00	1,000.00	0.00	0.00	1,000.00	0	0.00	0.00	1,000.00	0
				Total	1,000.00		0.00	1,000.00	0.00	0.00	1,000.00		0.00	0.00	1,000.00	
														Grand Total	1,000.00	

Figure 50.2

51. Goods Issue Cancellation

51.1. Intended Audience

Purchase Officer.

51.2. Usage

This interface has the provision to cancel the goods issue.

51.3. Menu Access

Main Menu >> Purchase Transactions >> Stock Issue Cancellation.

51.4. Dependency

Goods Issue.

Goods Issue Cancellation			
From Date*	15-12-2012	To Date*	10-01-2013

Generate Refresh

Date	Goods Issue Code	From Divisions	To Divisions	
28-Dec-2012	/Dec/012-13/00099	STORES	COMPUTER SCIENCE (UG & PG)	Cancel

Figure 51.1

51.5. To cancel the Goods Issue, follow these steps,

Step1: *Enter From date and To date, default current date*

Step2: *Click 'Generate" button, it would list goods issues generated for the specified period.*

Step3: *optional filters, select from divisions, to divisions.*

Step4: *Click on one row to view goods issue details are shown in figure: 51.2.*

Step5: *Click 'Cancel' button, to cancel the goods issue.*

Goods Issue Details View Print

Goods Issue Code	I/Dec/012-13/00099	Goods Issue Date	28-Dec-2012
Issuing Division	STORES	Receiving Division	COMPUTER SCIENCE (UG & PG)
Remarks			

Goods Issue Product List

SL. No	Product Name	Quantity Issued	Unit	Net Amount
1	CD RW (MOSER BEAR)	3.00	Nos	145.50
2	Card Reader (Multi Pin)	2.00	Nos	174.60
3	HP Laserjet 1022 - 12A Black - Refill	1.00	Nos	549.99
			Grand total:	**870.09**

GRN Code	RN/Nov/012-13/00048, RN/Nov/012-13/00064,

Figure 51.2

52. Consumable Spent Cancellation

52.1. Intended Audience

Purchase Officer.

52.2. Usage

This interface has the provision to cancel the goods issue.

52.3. Menu Access

Main Menu >> Purchase Transactions >>Consumable Spent Cancellation.

52.4. Dependency

Consumable Spent.

52.5. To cancel the Consumable Spent, follow these steps,

Step1: *Enter From date and To date, default current date*

Step2: *Click 'Generate" button, it would list consumable spent details generated for the specified period.*

Step3: *Click on the button "View" to view the consumable spent details.*

Step4: *Click on the button 'Cancel' button, to cancel the consumable spent.*

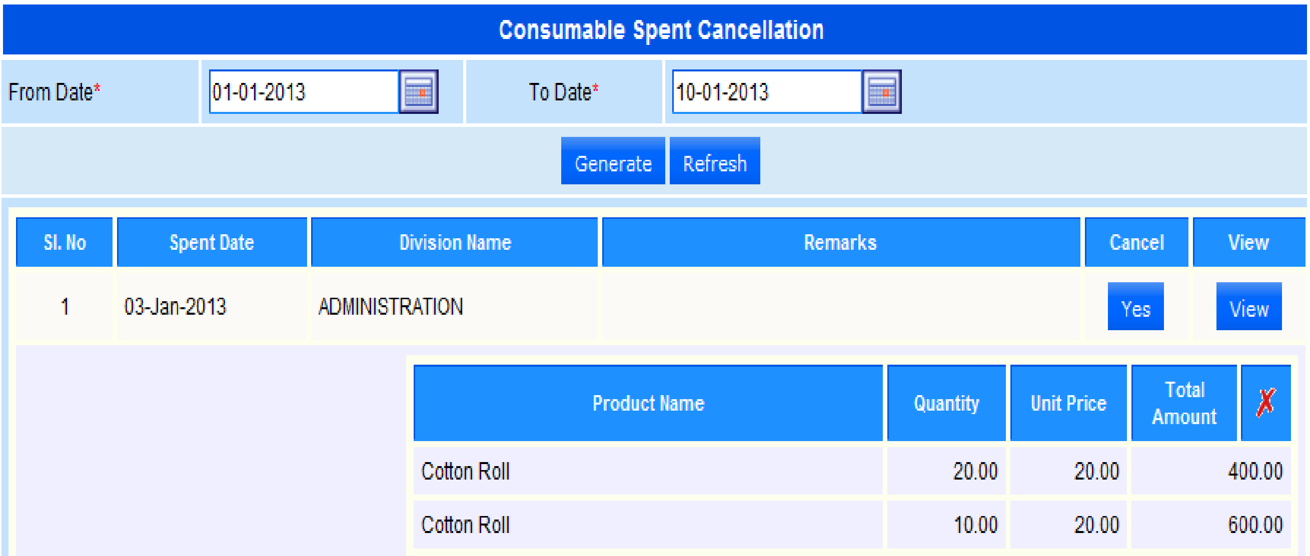

Consumable Spent Cancellation
From Date*
01-01-2013
To Date*
10-01-2013
Generate
Refresh
Sl. No
Spent Date
Division Name
Remarks
Cancel
View
1
03-Jan-2013
ADMINISTRATION
Yes
View
Product Name
Quantity
Unit Price
Total Amount
Cotton Roll
20.00
20.00
400.00
Cotton Roll
10.00
20.00
600.00

Figure 52.1

IV. Purchase Reports

53. Purchase Requisition Report

53.1. Intended Audience

All Users

53.2. Usage

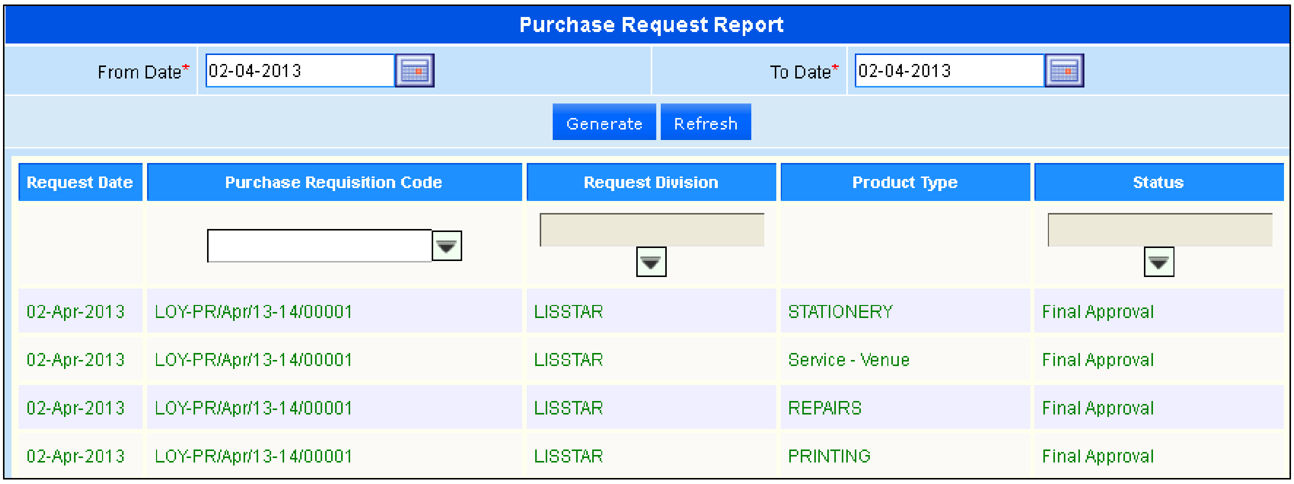
This interface is used to list purchase requisition list and purchase requisition details for a specified period for login user.

53.3. Menu Access

Main Menu >>Purchase Reports >>Purchase Requisition Report.

53.4. Dependency

Purchase Requisition.



Purchase Request Report

From Date* 02-04-2013 To Date* 02-04-2013

Generate Refresh

Request Date	Purchase Requisition Code	Request Division	Product Type	Status
02-Apr-2013	LOY-PR/Apr/13-14/00001	LISSTAR	STATIONERY	Final Approval
02-Apr-2013	LOY-PR/Apr/13-14/00001	LISSTAR	Service - Venue	Final Approval
02-Apr-2013	LOY-PR/Apr/13-14/00001	LISSTAR	REPAIRS	Final Approval
02-Apr-2013	LOY-PR/Apr/13-14/00001	LISSTAR	PRINTING	Final Approval

Figure 53.1

53.5. To view the Purchase Requisitions follow these steps,

Step1: Enter “From Date” and “To Date”, by default current date.

Step2: Click “Generate” button, this would list all purchase requisitions generated in the period.

Step3: To view further details of purchase requisition as shown in figure 53.2 click on row Respective to purchase requisition code and requesting division etc.

Purchase Request

Purchase Requisition Code PR/Feb/07-08/00125

Purchase Requisition Date 12-Feb-2008

Requested Division IT

S.No.	Product / Service	Quantity Requested	Leading Days	Due On	Specification
1	CELLO TAPE	3.00 Nos	5	12-Feb-2008	
2	Record Sheets	80000.00 Nos	5	12-Feb-2008	
3	CHALK PIECE	10.00 Box	5	12-Feb-2008	

Delivery Address IT
VEC

Remarks

Requested By

Final Approval

Figure 53.2

54. Purchase Request Report All

54.1. Intended Audience

All Users

54.2. Usage

This interface is used to list purchase requisition list and purchase requisition details for a specified period for all users.

54.3. Menu Access

Main Menu >>Purchase Reports >>Purchase Requisition Report – Over All.

54.4. Dependency

Purchase Requisition.

54.5. To view the Purchase Requisitions follow these steps,

Step1: Enter “From Date” and “To Date”, by default current date.

Step2: Click "Generate" button, this would list all purchase requisitions generated in the period.

Step3: To view further details of purchase requisition as shown in figure 54.2 click on row Respective to purchase requisition code and requesting division etc.

Purchase Request Report

From Date* 02-04-2013 To Date* 02-04-2013

Generate Refresh

Request Date	Purchase Requisition Code	Request Division	Product Type	Status
02-Apr-2013	LOY-PR/Apr/13-14/00001	LISSTAR	STATIONERY	Final Approval
02-Apr-2013	LOY-PR/Apr/13-14/00001	LISSTAR	Service - Venue	Final Approval
02-Apr-2013	LOY-PR/Apr/13-14/00001	LISSTAR	REPAIRS	Final Approval
02-Apr-2013	LOY-PR/Apr/13-14/00001	LISSTAR	PRINTING	Final Approval

Figure 54.1

Purchase Requisition

Purchase Requisition Code	LOY-PR/Apr/13-14/00001
Purchase Requisition Date	02-Apr-2013
Originating User	Mr. Victor Ashok Kumar. G
Requesting Division	LISSTAR

Purchase Requisition Details

S.No	Code	Product Name/ Service	Quantity					Price Per Unit	Lead Time in Days	Expected Receiving Date	Specification
			Requested	Approved	Unit	Processed	Received				
1		CAT-5 NETWORKING	1.00	1.00	Nos	1.00	0	0.00	1	03-Apr-2013	

Delivery Address	LISSTAR
Remarks	

Print Close

Other Details

Date	Sender	Designation	Division	Status	Remarks
02-Apr-2013 09:52	Mr. Victor Ashok Kumar. G	Research Assistant	LISSTAR	Data entry	To fix 15 Amps Switch for our new Xerox machine. (Urgent)
02-Apr-2013 03:43	Rev. Fr. Albert William S.J	Asst. Professor	SOCIOLOGY	Final Approval	Approved

Quotation Reference No. LOY-TR/Apr/13-14/00001

Figure 54.2

55. Purchase Request Consolidation Report

55.1. Intended Audience

All Users

55.2. Usage

This interface is used to consolidate purchase requests in product wise and optionally division wise .

55.3. Menu Access

Main Menu >>Purchase Reports >>Purchase Request Consolidation Report.

55.4. Dependency

Purchase Requisition.

55.5. To view the Purchase Requisitions follow these steps,

Step1: Select the approval employee, if required to display division wise request quantity, check “Display Division wise Request Quantity”. And then display the purchase requests to be approved by the selected employee.

Step2: Select the purchase requests to be consolidated.

Step3: Click on the button “Consolidate Print” to view the consolidate details for the selected purchase requests as in the figure 55.2.

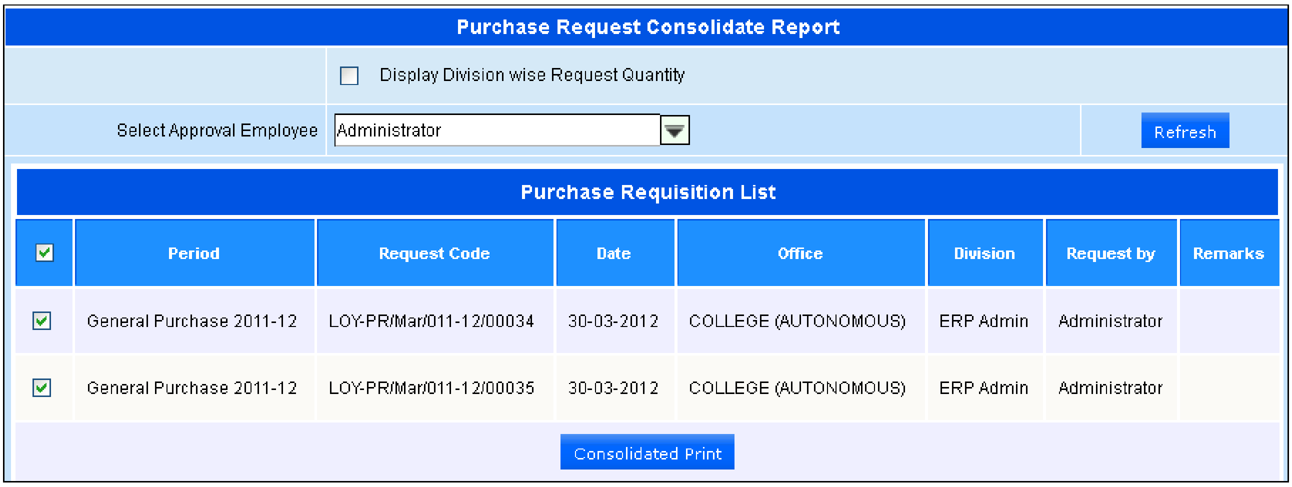


Figure 55.1

COLLEGE (AUTONOMOUS)				
Purchase Requisition Consolidated Report				
Code :		for the Month of : May 2013		
S.No.	Product Name	Stock in Hand	Quantity	Unit
STATIONERY				
1	A4 B2B COPIER PAPER	Nil	15.00	Nos
2	A4 JK COPIER PAPER	Nil	22.00	Nos

Figure 55.2

56. Quotation Report

56.1. Intended Audience

All Users

56.2. Usage

This interface is used to view Quotation list and quotation details report.

56.3. Menu Access

Main Menu >>Purchase Reports >>Quotation Report.

56.4. Dependency

Quotation Received Details.

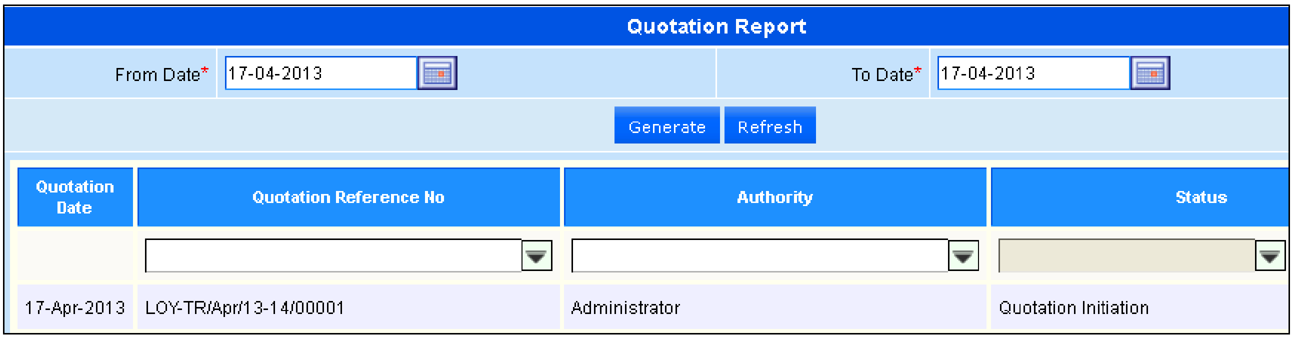


Figure 56.1

56.5. To view Quotation Report follow these steps

Step1: *enter quotation from date and to date, by default current date.*

Step2: *click on "Generate" button, it would lists quotations generated in the specified period.*

Step3: *optional filters, select quotation reference number, authority, status.*

Step4: *click on quotation to view quotation details. It would display as shown in figure 56.2*

Quotation Details Print

Quotation Ref No	LOY-TR/Apr/13-14/00001	**Quotation Opening Date and Time**	17-Apr-2013 / 01:14 PM
Quotation Date	17-Apr-2013	**Quotation Closing Date and Time**	17-Apr-2013 / 01:14 PM
Opening Authority	Administrator	**Quotation Venue**	
Quotation Status	**Quotation Initiation**	**Quotation Remarks**	Multiple Requests

Quotation Details

Sl.No	Product Name	Quantity	Unit
1	A4 JK COPIER PAPER	4.00	Nos
2	BOX FILE STEEL CLIP	12.00	Nos
3	CAT-5 NETWORKING CABLE BOX	1.00	Nos
4	SIGNATURE PEN ALL COLOUR	8.00	Nos
5	VOUCHER BOX FILE	24.00	Nos

Figure 56.2

57. Comparative Statement

57.1. Intended Audience

All Users

57.2. Usage

This interface is used to generate comparative statement from quotations received.

57.3. Menu Access

Main Menu >>Purchase Reports >>Comparative Statement.

57.4. Dependency

Quotation Received Details.

57.5. To view the Comparative Statement, follow these steps,

Step1: List of quotations received would be listed as shown in figure 57.1.

Step2: Comparative statement would be listed as shown in figure 57.2. On clicking a row respective to quotation reference number and department etc.

Comparative Statement					
Quotation List					
Department	Quotation Ref No	Quotation Date	Venue	Opening Authority	Remarks of Authority
Administration	EEC-TR/Apr/08-09 /00002	30-Apr-2008	College	Venkataramana G	-
Administration	SH-TR/Apr/08-09 /00009	17-Apr-2008	Office	Ramakrishna Raju	
Administration	SH-TR/Feb/07-08 /00001	17-Feb-2008		Thiru. Ravi	
Administration	SH-TR/Mar/07-08 /00034	19-Mar-2008	OFFICE	Ramakrishna Raju	

Figure 57.1

Faculty of Engineering and Technology, Delhi

Department Of Administration

Comparative Statement

Quotation Ref No : EEC-TR/Apr/08-09/00002

Detail

Sl. No	Product Name	Quantity	Unit	Supplier Name	Rate/Unit	Discount(%)/Unit	Tax(%)/Unit	Extra Charges	Total Amount
1	Accounts receipt book	50.00	Nos	ABC Graphics	38.50	0.00	0	0	1925.00

Overall Summary

Supplier Name	Description	Overall Additional Amount	Roundoff Amount	Amount Quoted
ABC Graphics	-	0.0	0.0	1925.00

for Faculty of Engineering and Technology, Delhi

Printed On : 4-3-2009 17:18:57

Authorised Signatory

Print Back

Figure 57.2

58. Purchase Order Report

58.1. Intended Audience

All Users

58.2. Usage

This interface is used to view purchase order list and purchase order details.

58.3. Menu Access

Main Menu >>Purchase Reports >>Purchase Order Report.

58.4. Dependency

Purchase Order.

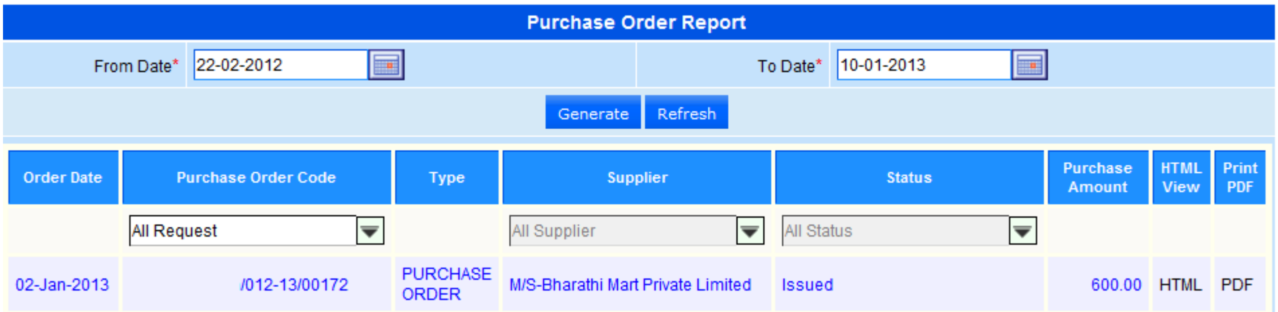


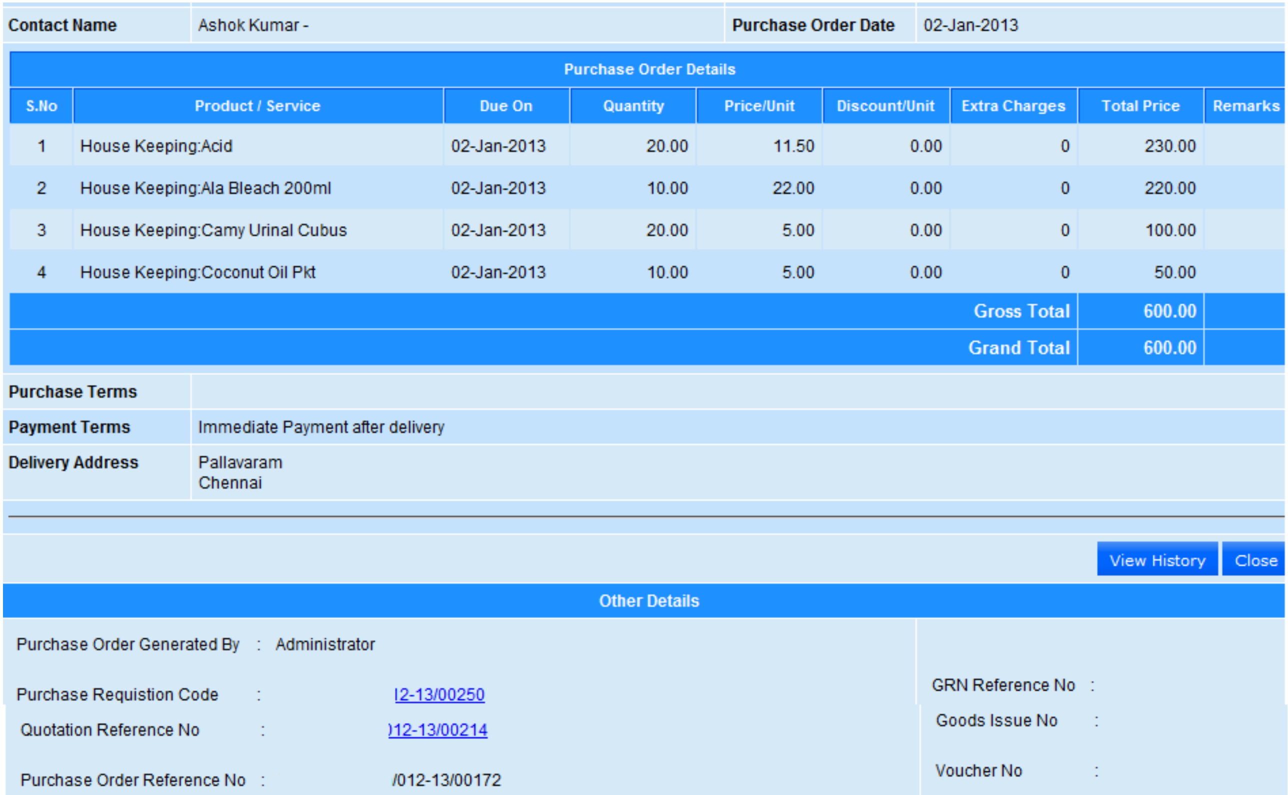
Figure 58.1

58.5. To view purchase order report, follow these steps

Step1: *enter from date and to date, by default current date.*

Step2: *click on "Generate" button, to list purchase orders generated in the specified period.*

Step3: *click on one row to view purchase order details are shown in figure* 58.2



Contact Name	Ashok Kumar -	Purchase Order Date	02-Jan-2013

Purchase Order Details

S.No	Product / Service	Due On	Quantity	Price/Unit	Discount/Unit	Extra Charges	Total Price	Remarks
1	House Keeping:Acid	02-Jan-2013	20.00	11.50	0.00	0	230.00	
2	House Keeping:Ala Bleach 200ml	02-Jan-2013	10.00	22.00	0.00	0	220.00	
3	House Keeping:Camy Urinal Cubus	02-Jan-2013	20.00	5.00	0.00	0	100.00	
4	House Keeping:Coconut Oil Pkt	02-Jan-2013	10.00	5.00	0.00	0	50.00	
						Gross Total	600.00	
						Grand Total	600.00	

Purchase Terms	
Payment Terms	Immediate Payment after delivery
Delivery Address	Pallavaram Chennai

View History Close

Other Details

Purchase Order Generated By : Administrator

Purchase Requistion Code : l2-13/00250

Quotation Reference No :)12-13/00214

Purchase Order Reference No : /012-13/00172

GRN Reference No :

Goods Issue No :

Voucher No :

Figure 58.2

59. Gate Pass Report

59.1. Intended Audience

All Users

59.2. Usage

This interface is used to view Gate Pass list and Gate Pass details list.

59.3. Menu Access

Main Menu >>Purchase Reports >>Gate Pass Report.

59.4. Dependency

Gate Pass Generation.

59.5. To view Gate Pass Note follows these steps

Step1: *enter from date and to date, by default current date.*

Step2: *click on "Generate" Button to list gate pass generated in the specified period.*

Step3: *click on one row to view gate pass details are shown in figure 59.2*

Gate Pass Report

* Mandatory

From Date : 05 March 2009 (DD/Month/YYYY)* To Date : 06 March 2009 (DD/Month/YYYY)*

Generate Refresh

Date / Time	Gate Pass Ref.No	Supplier Name	Purchase Order Ref.No	Remarks
05-Mar-2009 14:46	;P/Mar/08-09/00008	Gemini Communication Ltd ,	PUR/Oct/07-08/00001	
05-Mar-2009 15:17	;P/Mar/08-09/00009	Gemini Communication Ltd ,	PUR/Oct/07-08/00001	
05-Mar-2009 15:18	3P/Mar/08-09/00010	Gemini Communication Ltd ,	PUR/Oct/07-08/00001	
05-Mar-2009 15:53	3P/Mar/08-09/00011	Arunagiri Systems Last name	SRMEC(K)-PUR/Mar/08-09/00166	1865

Figure 59.1

Faculty of Engineering and Technology, Delhi (iiversity)

GATE PASS

Ref.No	:	K)-GP/Mar/08-09/00011	
In Date/Time	:	06/03/2009 10.40	Out Date/Time :
Purchase Order No	:	(K)-PUR/Mar/08-09/00166	
Supplier Name	:	Arunagiri Systems Last name	
Vehicle Number	:	1865	
Invoice Number	:	1865	
Received By	:	1865	
Remarks	:	1865	

Store In Charge / Supervisor Name & Sign Generated By : Fipl Purchase

Figure 59.2

60. Goods Recevied Note (GRN) Report

Two Provisions to view GRN Report

60.1. Goods Received Note(GRN) Report

60.2 GRN – Product wise

60.1 Goods Received Note(GRN) Report

60.1.1. Intended Audience

All Users

60.1.2. Usage

This interface is used to view Goods received list and goods received details list.

60.1.3. Menu Access

Main Menu >>Purchase Reports >>GRN Report.

60.1.4. Dependency

Goods Received Note.

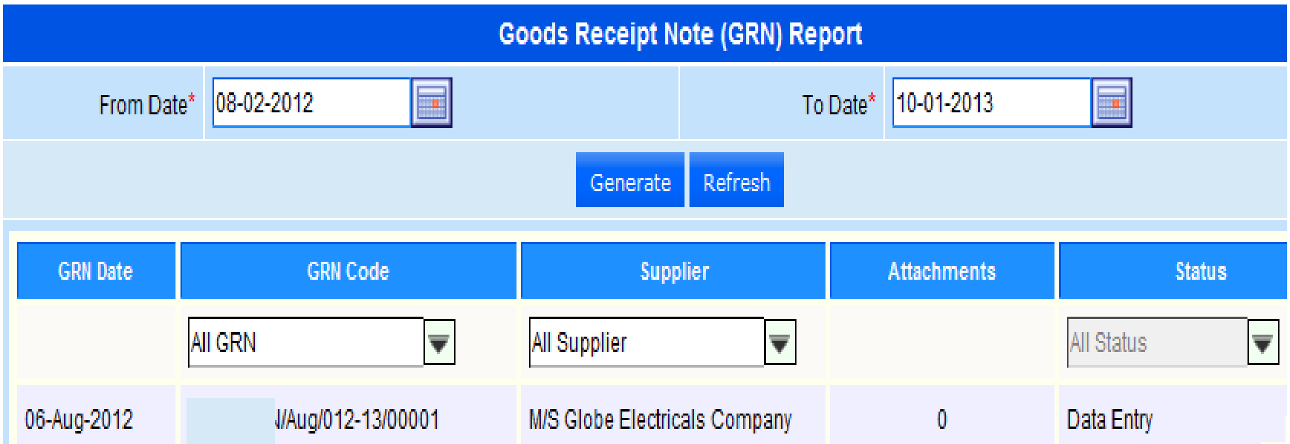


Figure 60.1.1

60.1.5. To view Goods Receipt Note, follow these steps

Step1: *enter from date and to date, by default current date.*

Step2: *click on "Generate" Button to list goods received notes generated in the specified period.*

Step3: *optional filters, select grn code, supplier, status.*

Step4: *click on one row to view goods received details are shown in figure* 60.2.

60.2 GRN - Product Wise

60.2.1. Intended Audience

All Users

60.2.2. Usage

This interface is used to view goods received details list.

60.2.3. Menu Access

Main Menu >>Purchase Reports >>GRN – Product wise.

60.2.4. Dependency

Goods Received Note.

Goods Receipt Note (GRN) Details Print

GRN Code	J/Aug/012-13/00001	Invoice No	7606
GRN Date	06-Aug-2012	Invoice Date	04-Aug-2012
Supplier Name	M/S Globe Electricals Company	Purchase Order Code	J/Aug/012-13/00009
GRN Status	Data Entry	Purchase Order Date	06-Aug-2012
GRN Remarks		Gate Pass Ref	001

Goods Receipt Note (GRN) - Product List

Sl No	Product Name	Quantity Received	Unit	Price/Unit	Discount (%)/Unit	Tax (%)/unit	Extra Charges	Total Amount	Qty Issued
1	E Type 25W Bulb - Whirlpool	2.00	Nos	25.00	0.00	14.50	0	57.25	0
2	Fridge Relay LMS - 043 230 V/50HZ Whirlpoom	1.00	Nos	175.00	0.00	14.50	0	200.38	0
3	Pin Type Bulb 25 Wats - Godrej	2.00	Nos	25.00	0.00	14.50	0	57.25	0
4	Rely KCU - 12, 230 V/50Hz Box Type - Goodrej	1.00	Nos	225.00	0.00	14.50	0	257.63	0
							Gross Total	572.51	
							Grand Total	572.51	

Figure 60.1.2

60.2.5. To **view GRN – Product Wise details**, follow these steps

Step1: *enter from date and to date, by default current date.*

Step2: if required, select product name, supplier name.

Step3: *click on "Generate" Button to list goods received notes generated in the specified period for the selected product, supplier.*

Step5: *click on one row to view goods received details are shown in figure* 60.1.2.

GRN Report - Product Wise

* Mandatory

From Date : 05 March 2009 (DD/Month/YYYY)* To Date : 05 March 2009 (DD/Month/YYYY)*

Product Name : PRINTER-10g Supplier Name : Access Computer Data Corp. ACDC

Generate Refresh

SL No	Date	Product Name	Quantity Received	Unit	Price/Unit	Discount (%)/Unitt	Tax (%)/unit	Extra Charges	Total Amount (In Rs.)	Supplier	Status
1	05-Mar-2009	PRINTER-10g	20.00	Nos	10000.00	0.00	0.00	0	2,00,000.00	Access Computer Data Corp. ACDC	Data Entry
	Total		20.0						2,00,000.00		

Figure 60.2.3

61. Goods Issue Report

Two Provisions to view Goods Issue Report

61.1 Goods Issue Report

61.2. Goods Issue – Product wise

61.1. Goods Issue Report

61.1.1. Intended Audience

All Users.

61.1.2. Usage

This interface is used to view goods issue and goods issue details list.

61.1.3. Menu Access

Main Menu >>Purchase Reports >>Goods Issue Report.

61.1.4. Dependency

Goods Issue

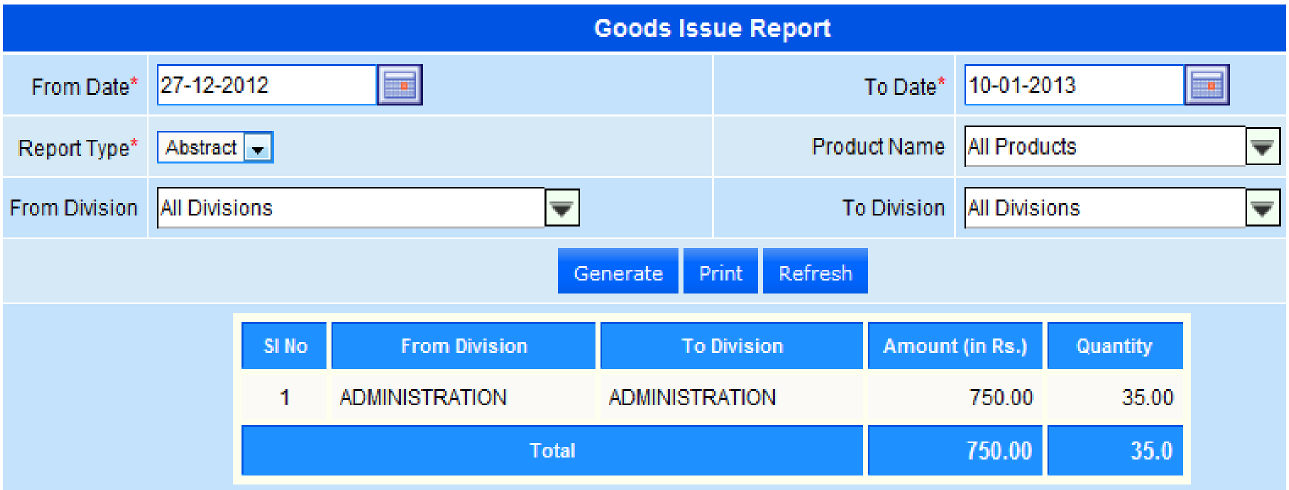


Figure 61.1.1

61.1.5. To view Goods Issue Details follow these steps

Step1: *enter from date and to date, by default current date.*

Step2: *click on "Generate" button, it would list goods issues.*

Step3: select from divisions and to divisions to filter goods issues.

Step4: *click on one row to view goods issue details, it would appear as shown in figure.*

Goods Issue Report								
Sl No	Date	Product Name	Quantity	Unit	Amount (in Rs.)	From Division	To Division	Remarks
1	03-Jan-2013	Babdage Roll	5.00	Nos	150.00	ADMINISTRATION	ADMINISTRATION	
2	03-Jan-2013	Cotton Roll	30.00	Nos	600.00	ADMINISTRATION	ADMINISTRATION	
Total			35.0		750.00			

Figure 61.1.2

61.2. Goods Issue – Product wise

61.2.1. Intended Audience

All Users.

61.2.2. Usage

This interface is used to view goods issue details list.

61.2.3. Menu Access

Main Menu >>Purchase Reports >>Goods Issue- Product wise.

61.2.4. Dependency

Goods Issue

61.2.5. To view Goods Issue Details follow these steps

Step1: *enter from date and to date, by default current date.*

Step2: if required, select product name, from division, to division.

Step2: *click on "Generate" button, it would list goods issue details.*

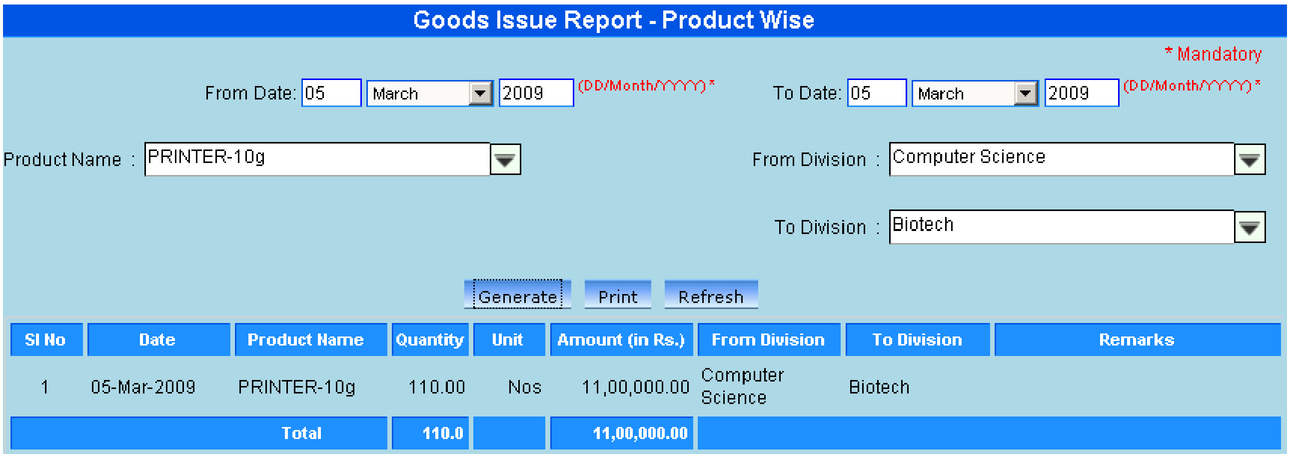


Figure 61.2.1

62. Stock Report

62.1. Intended Audience

Stores In-charge, Purchase Officer and Head of the Department.

62.2. Usage

This interface is used to view stock list and stock details list.

62.3. Menu Access

Main Menu >>Purchase Reports >>Stock Report.

62.4. Dependency

Goods Received Note, Goods Issue

Figure 62.1

62.5. To view stock details follow these steps,

Step1: *enter from date and to date, by default current date.*

Step2: *click on "Generate" button to view stock details.*

Step3: select division to filter division wise stock details, then would appear as in the figure 62.3. If select all divisions, then screen would appear as in the figure 62.2.

Step4: *click on one row, it would list product wise stock details.*

Step5: *We can able to view the stock in and stock details if stock in or stock out found respectively as in the figure 62.4 and 62.5.*

STOCK ABSTRACT - DIVISIONS								
From 17-Apr-2013 To 17-Apr-2013								
Division	Available Qty				Amount			
	Opening Stock	Stock In	Stock Out	Closing Stock	Opening Balance	Stock In	Stock Out	Closing Balance
(SSC) M.L.T	2.0000	0	0	2.0000	1,995.00	0.00	0.00	1,995.00
Betram Hall	16.0000	0	0	16.0000	3,090.05	0.00	0.00	3,090.05
BURSAR OFFICE	138.0000	0	0	138.0000	27,591.43	0.00	0.00	27,591.43
CHEMISTRY	246.0000	0	0	246.0000	14,650.70	0.00	0.00	14,650.70

Figure 62.2

STOCK REGISTER								
From 17-Apr-2013 To 17-Apr-2013								
CHEMISTRY								
Product Name	Available Quantity				Amount			
	Opening Stock	Stock In	Stock Out	Closing Stock	Opening Balance	Stock In	Stock Out	Closing Balance
COMPUTERS AND ACCESSORIES								
DVD	15.0000	0.0000	0.0000	**15.0000**	94.5000	0.0000	0.0000	**94.5000**
Total	**15.0000**	**0.0000**	**0.0000**	**15.0000**	**94.5000**	**0.0000**	**0.0000**	**94.5000**
ELECTRICAL ITEMS								
40W Tube	3.0000	0.0000	0.0000	**3.0000**	137.4000	0.0000	0.0000	**137.4000**
9 VOLT MIC BATTARY	15.0000	0.0000	0.0000	**15.0000**	300.3000	0.0000	0.0000	**300.3000**
A/C METAL BOX	1.0000	0.0000	0.0000	**1.0000**	738.5300	0.0000	0.0000	**738.5300**
JUNCTION BOX WITH 5 MTR WIRE	2.0000	0.0000	0.0000	**2.0000**	1,345.3800	0.0000	0.0000	**1,345.3800**
Total	**21.0000**	**0.0000**	**0.0000**	**21.0000**	**2,521.6100**	**0.0000**	**0.0000**	**2,521.6100**
FURNITURE ITEMS								
Rolling Chair	1.0000	0.0000	0.0000	**1.0000**	3,664.0000	0.0000	0.0000	**3,664.0000**

Figure 62.3

Stock Out Details							
PRODUCT NAME : Book Self - Steel							
Sl. No.	Transaction Date	Transaction Ref. No.	Transaction Type	Remarks	Amount / Unit	Quantity	Value
1	17-Apr-2013	LOY-ST/Apr/13-14/00002	Stock Transfer (ERP Admin)	-	6,930.0000	2.0000	13,860.00
						2.0000	**13,860.0000**

Figure 62.4

Stock In Details							
PRODUCT NAME : Book Self - Steel							
Sl. No	Transaction Date	Transaction Ref. No.	Transaction Type	Remarks	Amount / Unit	Quantity	Value
DIVISION NAME: ERP Admin							
1	17-Apr-2013	LOY-ST/Apr/13-14/00002	Stock Transfer	-	6,930.0000	2.0000	13,860.00
						2.0000	**13,860.0000**

Figure 62.5

63. Stock Movement Report

63.1. Intended Audience

Stores In-charge, Purchase Officer and Head of the Department.

63.2. Usage

This interface is used to view stock movement details between various departments.

63.3. Menu Access

Main Menu >>Purchase Reports >>Stock Movement Report.

63.4. Dependency

Stock Transfer Acknowledge

Stock Movement Report			
From Date*	01-04-2013	To Date*	17-04-2013
From Division		To Division	
Generate	Refresh		

Stock Movement Report			
Sl. No	From Division	To Division	Amount (in Rs.)
1	ENGLISH	ERP Admin	16,767.75
2	MAINTENANCE	PRINCIPAL OFFICE	693.00
Total			17,460.75

Figure 63.1

63.5. To View the stock movement report follows these steps,

Step1: *Select the date range.*

Step2: *Select from division, if required to filter from division wise.*

Step3: *Select to division, if required to filter to division wise.*

Step4: *Click on the button "Generate" to view the stock movement details between various departments.*

64. Stock Transfer Report

64.1. Intended Audience

Stores In-charge, Purchase Officer and Head of the Department.

64.2. Usage

This interface is used to view stock transfer details between various departments.

64.3. Menu Access

Main Menu >>Purchase Reports >>Stock Transfer Report.

64.4. Dependency

Stock Transfer

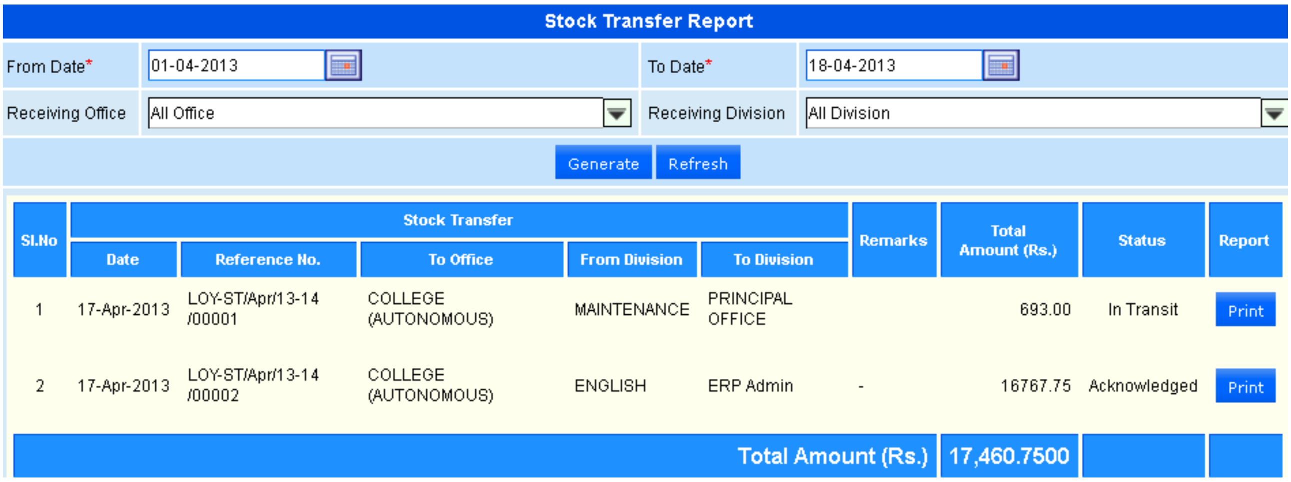


Figure 64.1

64.5. To view the stock transfer report follows these steps,

Step1: *Select the date range*

Step2: *Select the office name if required.*

Step3: *Select the receiving division if required.*

Step4: *Click on the button "Generate" to view the stock transfer details.*

65. Purchase Journal Report

65.1. Intended Audience

All Users

65.2. Usage

This interface is used to view purchase journal list and purchase journal details list.

65.3. Menu Access

Main Menu >>Purchase Reports >>Purchase Journal.

65.4. Dependency

Purchase Journal.

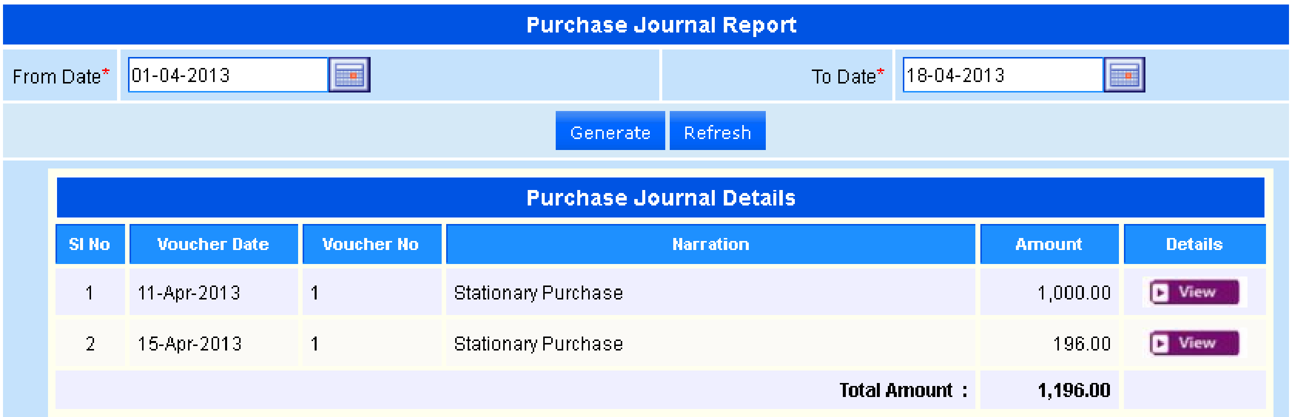


Figure 65.1

65.5. To view Goods Receipt Note, follow these steps

Step1: *enter from date and to date, by default current date.*

Step2: *click on "Generate" Button to list purchase journal details generated in the specified period.*

Step3: *click on one row to view voucher details as shown in figure* 65.2*.*

Step4: *click "view" button to view purchase journal details are shown in figure* 65.3*.*

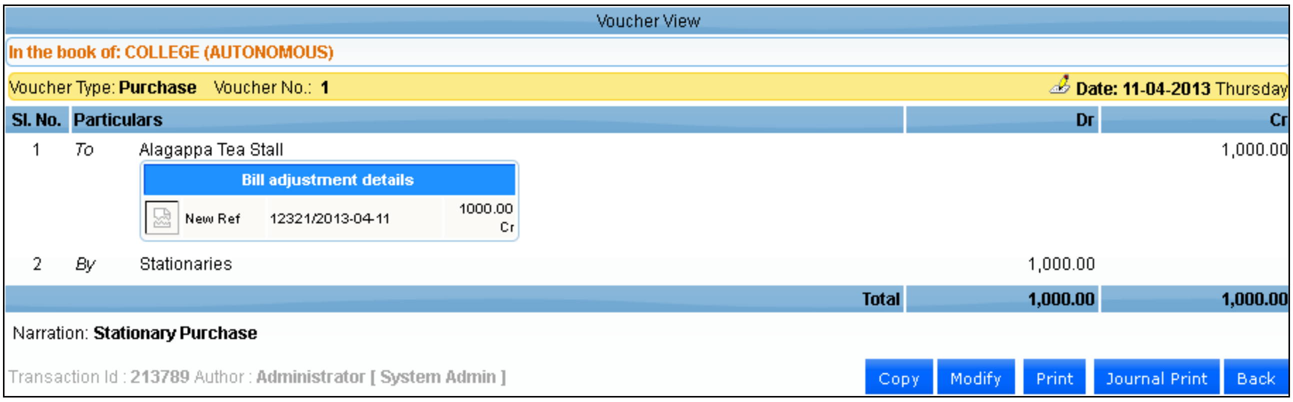


Figure 65.2

Journal Detail View

Journal Posting Date : 11-Apr-2013

Supplier Name : Alagappa Tea Stall

Amount : 1,000.00

Narration : Stationary Purchase

GRN Details				
GRN Code	**GRN Date**	**Invoice No**	**Invoice Date**	**Amount**
LOY-GRN/Apr/13-14/00001	11-Apr-2013	12321	11-Apr-2013	1,000.00
			Total Amount	**1,000.00**

Figure 65.3