

Register Types

- Material Dashboard status request based on Yesterday, Today and Overall Pending's.
- Home screen showing Material request status of recent one month.
- Based on the user role configured, the Sub registers will be visible to the users.

General

- Approval level extended up to 5 levels.
- Apart from the main approver, 9 alternate approvers can be configured.
- The alternate approvers list will be in a sequential based on the time configuration.
- Sub-Registers can be configured through system.
- Based on the user role - sub register access rights can be provided.
- Inward registers shown as a separate menu as Receipt.
- IBT - Inter Branch Transfer.
- Material Dashboard status request based on Yesterday, Today and Overall Pending's.

General Flow

- Approval level extended up to 5 levels.
- Apart from the main approver, 9 alternate approvers can be configured.
- Acknowledgment approval level up to 5 levels.
- Return approval level up to 5 levels.

Request

- Authorizer's level extended up to 5 levels.
- For Acknowledgement also 5 levels of approver.
- For return also 5 levels of approver.
- Apart from the main approver, 9 alternate approvers can be configured.
- Request can be raised from multiple locations.
- Delivery Challan number and date are captured.
- Material can be added up to 50 line items.
- Asset module integrated.
- Asset items also included in the request.
- For asset items, barcode search identification of Asset.
- Vehicle module integrated.
- Requestor can add Vehicle details by integrating vehicle module. It is available when Vehicle module License available.
- Requestor can add Vendor details from the vendor master.
- The approximate value matched with the material items total value
- For Location License, the requestor no can be generated either sub register wise or sequence wise based on "RequestNoBasedLocationWise" enabled in Admin settings.
- Authorizer name will bind automatically based on the workflow except for Manual Authorizer.

- Manual Authorizer, a lookup is available, on clicking this; a popup window will be opened with the Approver list. From that user will select the approver.
- Easily Configure manual approver by selecting the approver name in the list.
- Email notification for the requestor, Approvers for each request.
- Email notification are enabled and disabled by the admin.

Request Search

- Location wise search included to search the request for across locations when location license is available.
- User can download and view the attachment for the request.
- Exports the Search results to various formats (PDF, XLS, XLSX, RTF and CSV).

Receipt

- Receipt is the first stage of Material Gate Pass for Inward Registers.
- Receipt is accessible based on the User Role configuration.
- Receipt page opens the UI with dynamic controls based on the selected Sub register settings and configurations.
- The request number is the key tracking number. Can be configured as auto or manual by the admin per Sub Register.
- Receipt is not configured for a sub-register, an alert will be thrown.

Approval

- Location wise search included to search the request for across locations when location license is available.
- Approval level is increased to 5.
- For each level, 9 Alternate approvers can be configured.
- Approver can mark the request as “Hold for clarification” and enter his remarks. This will redirect to the requestor to clarify the approver comments.
- User can download and view the attachment for the request.
- Remarks field is to add the comments /feedback about the request.
- Admin Able to add Custom fields in Material Approval screen.
- Outside the system, email approval/reject/clarification for the Material Request

Value Based Approval

- Value limits approver can be configured based on limits.

Approver Configuration

- Location wise approver can be configured for across locations when multi-location license is available.
- Material approver and alternate approver can be configuring for each Default.
- We can able to configure 5 levels of main “Material approver” and 9 Levels of “Alternate approver” simultaneously as per Sub register.

- Reports to requestor Approver based on Configuring “Reports to” person of the requestor in employee master.

Dispatch-1

- User can download and view the attachment for the request.
- Asset verification by scanning the barcode option

Dispatch-2 ??

- User can download and view the attachment for the request.
- Asset verification by scanning the barcode option
- Any changes in Partial dispatch??

Return

- Asset verification by scanning the barcode option

Partial Return

- Asset verification by scanning the barcode option.
- System captures “Expected date of Return” when partially returning material.
- User can send Mail to extend the “Expected date of return” for particular material request by clicking the request icon in the return page.

Gate Pass Settings

- Material event mail template can be configuring in EmailTemplate page.
- Admin can enable or disable email/SMS settings for material request.
- Admin can enable or disable email for material request update.
- Admin can enable or disable email/SMS settings for material Approval.
- Admin can enable or disable email for material Approval update, Request Approved, Material Dispatch, Request Cancellation and Request Acknowledge.
- Admin can configure To ID, CCID, BCCID, Subject of Email and Content of Email by Using EmailTemplate master.

Material Master

- Admin can enable and add the HSN code.

Workflow

- Value limits approver can be configured based on limits.

Dispatch-1 Configuration

- Admin can configure the email of the vendor for the email notification.

Stage wise Scorecard in Home (views)

- Last 30 days transaction shown in the home.

Email Notification

- While dispatch the customer is notified by sending an email.
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Reports

- GRN declaration form as PDF.
- Outward declaration form as PDF
- Material Asset Tracking Report.
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Inter Branch Transfer (IBT)

- IBT is available for multi-location license.
- The System allows transferring materials from one branch to another (one location to another location).
- IBT request is created while the material request is created.
- Dynamic screen and controls based on the Sub register settings and configurations.
- The IBT request is raised by, selecting any location in the list which is shown in Location Search popup.
- User can view the IBT Request Count in Home Page.
- By clicking the request count in home page, it navigates to IBT.
- IBT is the Page to list all IBT requests with all possible fields.
- Show All Fields link to view the all other fields of the request.
- Once the material sent from one branch to another branch, in the another branch login the “Inward – Returnable” will be “Outward-Returnable” and “Outward-Returnable” will be “Inward-Returnable” and vice versa.
- Exports the Search results to various formats (PDF, XLS, XLSX, RTF and CSV).

Attachments

- Requestor can add attachment while entering the material request.
- Requestor can add multiple attachments.
- Attachment Control will be configurable by admin in the backend.
- User can download and view the attachment from the Search grid results.
- The Attachment could be mandatory or non-mandatory based on the configuration.
- The user can download the attachment in any stages of material workflow.
- Allow to edit the attachment when the status in “New”.

User across Location

- User across location is the added feature for the employee master.
- System allows the Employee to approve material across multiple Locations, by enabling Location Checkbox in the “User across Location” Checkbox List.
- By enabling this feature employee can approve material across multiple Location.
- This feature is enabled for multi-location license.

Vehicle Master

- Vehicle module is used to record the entry of vehicles.
- Able to manage the Check in and Checkout of Vehicles using Check in and Checkout Register Screen.
- The Vehicle check in screen captures the details of vehicle, driver and transporter.
- Vehicle Check in is based on sub register.
- Allow the vehicle check in after verifying Vehicle Check in Checklist like (License, RC Book Etc.,).
- Allow vehicle to Checkout after verifying Vehicle Checkout Checklist.
- The Check in checklist and Checkout checklist can be added and removed using Vehicle Checklist Master.

Vehicle Integration

- A New feature is available to integrate vehicle module with material module.
- This feature will be enabled when vehicle module License is available.
- By enabling this feature the user can add the Check in Vehicle details for the current sub-register.
- This Control can be easily configured by admin.
- Able to configure this field in material report also.

Vendor details

- The user can add Vendor master details.
- This feature can be easily configurable by admin as per specific requirement.
- The requestor can add vendor details by selecting the vendor name from the list in the Opened popup window.
- Able to configure this field in material report and material gate pass.

Email Customizations / Email Templates

- Admin can edit the Email template.
- Highly customizable with fields of specific requirements.
- Fields to configuring ToID, CCID, BCCID, and Subject for the email.
- Admin can change Content of email as per the user choice.
- Preview the email template by clicking the Preview button.
- Edit the email template by clicking the Edit button.

Asset – Material Integration ??