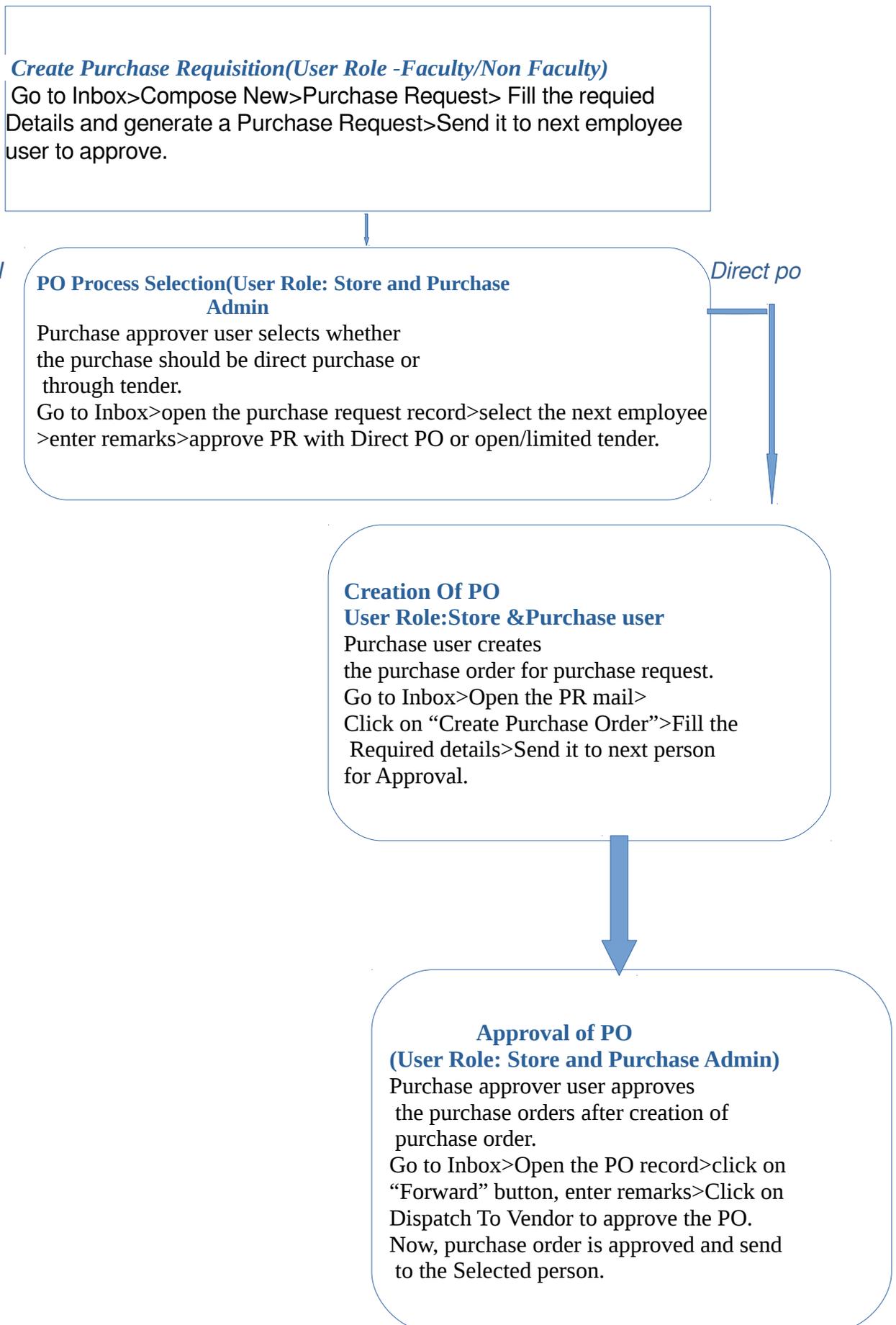


ERP PURCHASE MODULE

General Steps:

1. Create PR and Forward it to the next employee to approve the PR. User Role to create PR - (Faculty/Non Faculty)
2. Approve the PR and forward it to the next employee to create PO. User Role to approve PR - stores & purchase admin
3. Create PO and forward it to the next employee for the approval of PO. User Role to CREATE PO - stores & purchase USER
4. Approve PO(Dispatch to vendor) and forward it to the next employee to create GRN(GOODS RECEIPT NOTE). User Role to approve PO - stores & purchase admin
5. Create GRN and send it to the indenter for approval. User Role to CREATE GRN - stores & purchase admin
6. Login as indenter and approve GRN.
7. After approving grn, it will be automatically sent to the concerned user(who has created the grn). He/she will be able to create bills and update stock. User Role to UPDATE STOCK - stores & purchase admin
8. After updating the stock, the store and purchase admin can issue the items.

PURCHASE MODULE WORKFLOW CHART





CSRV Creation (Store and Purchase Admin):

CSRV/GRN can only be created for the purchase orders which are with status of “Dispatch To Vendor”.

Click on Purchase Orders>Several search filters will be shown on the screen>Select “Dispatch To Vendor” from status filter.>Search>click on action button>create csv>Send to Indenter for approval.



**Update stock and create bill
(User Role:Store and purchase admin)**

Store user will generate the bill.

Store keeper user role>Inbox>open the CSRV Request>Select the next person>click on generate asset and bill>stock will get updated.

PURCHASE MODULE – WORKING IN DETAIL

1. Create PR and Forward it to next employee to approve the PR. (FOR EX : You can create PR using this id 'kavitap' and send it to this 'sangeetha' userid for approval)
Path to create PR: Go to Home/Faculty or Non Faculty or staff/Inbox/Compose/Purchase Request.

2. Approve the PR with direct PO/TENDER and forward it to next employee(dord-USER ID) to create PO.

Check here to create a note for self.
The note will be visible to all in the workflow activity area below.

SEND BACK **FORWARD**

FORWARD THIS REQUEST TO: ADM004 - DEAN R&D ...

PLEASE ENTER YOUR REMARKS: CREATE PO
Field limited to 2000 characters.

SEND **CALL FOR -**

DIRECT PO
LIMITED TENDER
OPEN TENDER

Workflow activity

Ms. Kavita Pandey [Request to] Mrs. Sangeetha Gurusamy
rem

Sep 27, 2022 2:53:21 PM

How to approve PR: (LOGIN as sangeetha (USER ROLE-STORE & PURCHASE ADMIN), open the PR and select next employee enter remarks ,click on call for PO, Click on direct po.After approving PR with status 'call for PO/Tender' forward it to this "dord" userid for PO creation)

3. Create PO and forward it to next employee (erpadmin)for the approval of PO.
How to create PO--(LOGIN AS dord ((USER ROLE-STORE & PURCHASE user)) Open the PR and click on 'Create PO' button , a new window will be opened , fill the required details and sent it to this 'erpadmin' userid for PO approval)

Create Purchase Order

Mark as read

1 of 2

Purchase Requisition: B-000002-ADMIN-22-23

Selected Item(s)

#1. 11-Lab Bottle 25ml with PP Screw Cap
Make:
Category: []
1 Items @ ₹ 1,200.00 = ₹ 1,200.00

Items total: ₹ 1,200.0 Discounts: ₹ 0.00 Taxes: ₹ 0.00 Total: ₹ 1,200.0

Requisition Details

This request has been FORWARDED to PURCHASE. Please see workflow activity below for more details

Ms. Kavita Pandey / Administration

Type: Both / NON RC
Requested on: 27/09/2022
Purpose: test
Installation: No
Warranty: No

Click here if file is created for this Indent.

Check here to create a note for self.
The note will be visible to all in the workflow activity area below.

SEND BACK **FORWARD**

4. Approve PO (Dispatch to vendor) and forward it to next employee ('sangeetha') to create GRN (GOODS RECEIPT NOTE).

How to approve PO--(Login as erpadmin (USER ROLE-STORE & PURCHASE ADMIN)) and approve the PO by clicking on dispatch to vendor and forward it to "SANGEETHA" (USER ROLE-STORE & PURCHASE ADMIN) for GRN creation)

	INR 1,200
--	-----------

Costs		
Items Total ₹ 1,200.0	Discounts ₹ 0.00	transportation, other & miscellaneous charges ₹ 0.00
taxes ₹ 0.00	net amount ₹ 1,200.0	Terms & Conditions

CANCEL
SEND BACK
FORWARD

FORWARD THIS REQUEST TO: 077 - MRS. SANGEETHA GUR... ▾

PLEASE ENTER YOUR REMARKS:

Field limited to 500 characters.

SEND
DISPATCH TO VENDOR

5. Create GRN and send it to indenter (kavitap) for approval.

Path to create GRN: Go to Home/Store & Purchase Admin/Purchase Orders/Filter the data/Click on action button associated with records/create GRN.

🔔
👤

Home / Purchase Orders

Filter By

PO Prepared By

Purchase Order From Date

Status

CHOOSE TYPE... ▾

SELECT EMPLOYEE... ▾

01/04/2022

Dispatch to Vendor ▾

Department / Project

Vendor

Purchase Order To Date

CHOOSE PROJECT/DEPART... ▾

CHOOSE A VENDOR... ▾

30/09/2022

Search

🖨️
📄

Purchase Order Amounts in INR 1,200.00

#	Particulars	Order Date	Indenter Details	Order Location	Order Status	Order Amount	
1	5678/iiser A.A Traders enter po details	27/09/2022	Ms. Kavita Pandey Administration	Sangeetha Gurusamy	Dispatch to Vendor	INR 1,200.00	<div style="border: 1px solid #ccc; padding: 5px; display: inline-block;"> Action ▾ Create Grn Download PDF Email to Vendor </div>

6. login as indenter(kavitap) and approve GRN.

Store Receipt No. 5678/iiser-GR-4 on dated 27/09/2022

Mark as read
1 of 1

Selected Item(s)

#1. 11 Lab Bottle 25ml with PP Screw Cap

1 Items @ 1200 (INR)

Received Item (No.)

1200

1

Item wise Discount (INR)

0.00

Damaged / Rejected Item (No.)

0

Item wise Tax (INR)

0.00

Please mention reason of rejection, if any!

Gross: (INR)	1200.00	Total Discount: (INR)	0.00
Total Taxes: (INR)	0.00		
Other Charges: (INR)	0.00	Misc Charges: (INR)	0.00
PF Charges: (INR)	0.00	Net: (INR)	1200.00

Grn Details

This Grn is in PENDING status.

Purchase Order: 5678/iiser

Vendor Name: A.A Traders

DC No.: 12
DC Date: 27/09/2022
Select A Store: Purchase & Stores Section
Remarks: W

Please enter remarks if any...

Approve Grn

7. After approving grn, it will be automatically sent to concerned user(who has created the grn). He/she will be able to create bill and update stock. **User Role to UPDATE STOCK - stores & purchase admin.**

Gross: (INR)	1200.00	Total Discount: (INR)	0.00
Total Taxes: (INR)	0.00		
Other Charges: (INR)	0.00	Misc Charges: (INR)	0.00
PF Charges: (INR)	0.00	Net: (INR)	1200.00

DC Date: 27/09/2022
Select A Store: Purchase & Stores Section

Create Liability

During Grn system will generate bill and send to accounts

To whom you want to forward the bill: 063 - MR. SANDEEP AHLAWAT

Company: IISER PROJECT-01/04/2022-3...

Payable amount (INR): 1200

Cost Center: PHYSICS

Release payments in installments? Yes No

CREATE ASSET & BILL GENERATION

Workflow activity

8. After updaing the stock, store and purchase admin can issue the items.

Home / Purchase GRN

Filter By: CHOOSE TYPE...

Prepared By: SELECT EMPLOYEE...

CsrV From Date: 01/04/2022

Purchase Status: Approve

Department / Project: CHOOSE PROJECT/DEPART...

Vendor: CHOOSE A VENDOR...

CsrV To Date: 30/09/2022

Voucher Status: --Select--

Search

Store receipt amounts in INR 6,593.97

#	Particulars	UTR Details	CsrV Date	Indenter Details	Current Location	Status	Asset Generated	Amount	Action
1	PO NUMBER-GR-2 A.A Traders Invoice No. 2 on dated 27/09/2022	N/A	27/09/2022	Mrs.Sangeetha Gurusamy Computer Centre	Sangeetha Gurusamy	Approve	Yes	INR 226.22	Action

1234/iiser-GR-3 A.A Traders
Mrs.Sangeetha
Issue Items

Path to issue items: Go to store &Purchase Admin/Purchase GRN/Filter the data/Click on action button associated with records/issue items.

Note:

1. Users having roles which is mentioned under this `(purchase_approver_role_names)` config key can approve PR for direct PO/Tender.

2. Users having roles which is mentioned under this `(store_purchase_role_names)` config key can create PO.