Standard Steps For Master Data

Overview

User can use Purchase module for purchase related activities.
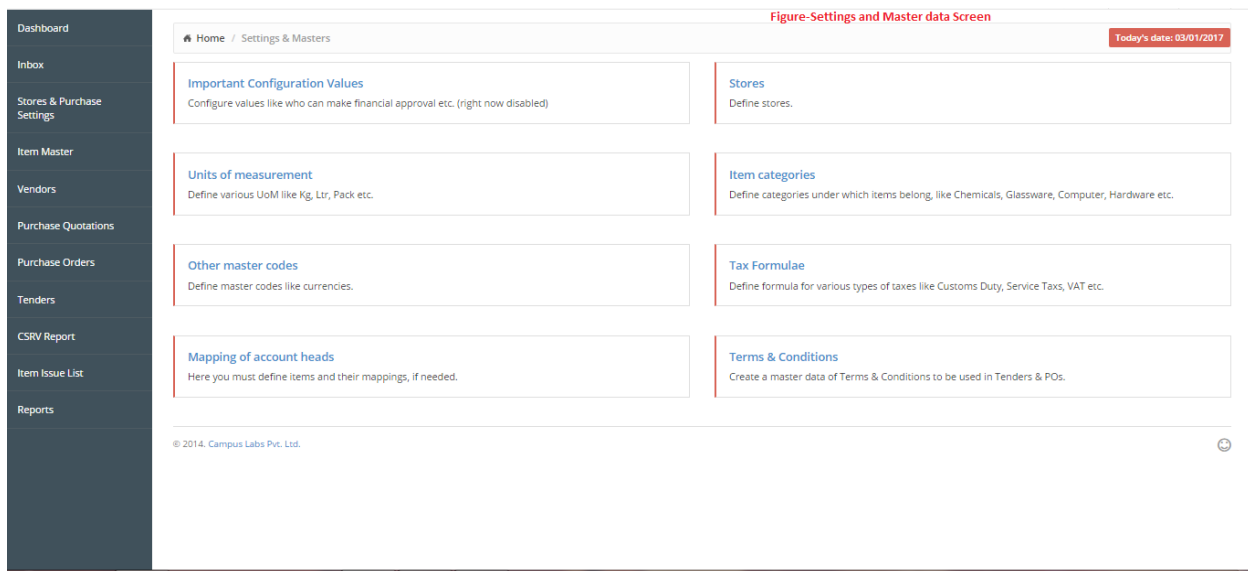
Master Data: Data that is required/pre-requisite to drive functionality is known as "Master Data".

Following activities are possible with the Master Data:

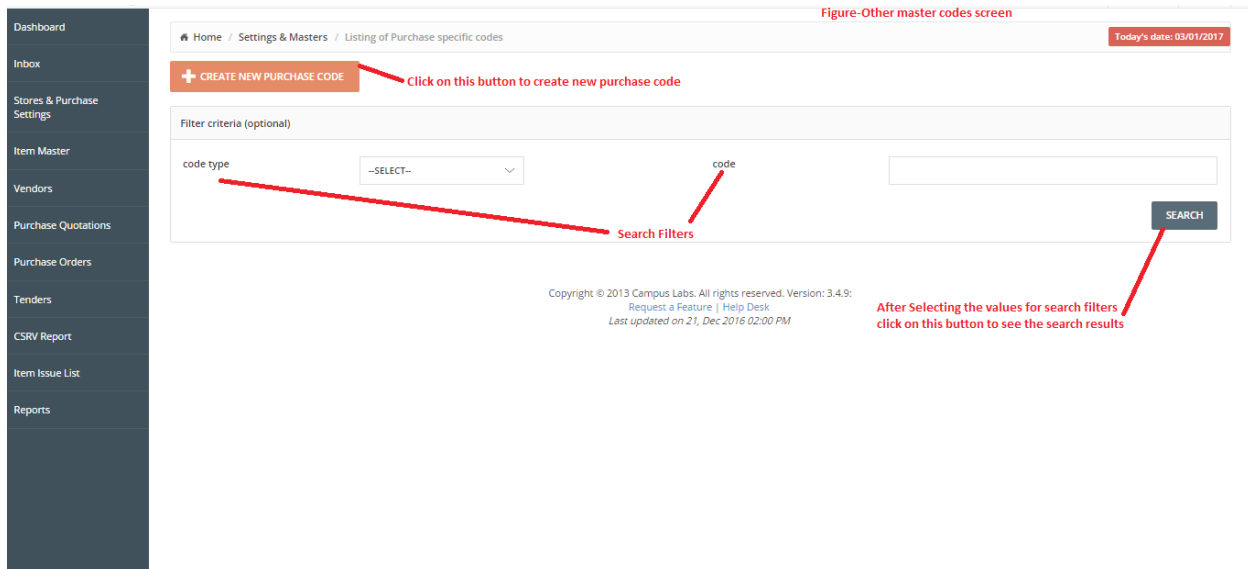1. Creation
2. Searching
3. Edit
4. Delete

Standard Steps:

User can follow standard steps to create/ Search/ edit/ delete any data in the model (Figure-1).

Figure-Settings and Master data Screen

Steps for Creation:

User can follow these steps to create new data (For example: Creation of new currency):

1. Login at Campuslabs ERP with your credentials.
2. Click on "Stores & Purchase Settings" menu from left menu pane.
3. Click on "Other Master Codes" option, Screen of other master code is opened(Figure- Other Master Codes).

Figure-Other master codes screen

4. Click on "Create new purchase code" button, form for code creation will be opened(Figure-Create Master Data).

Figure- Create master data
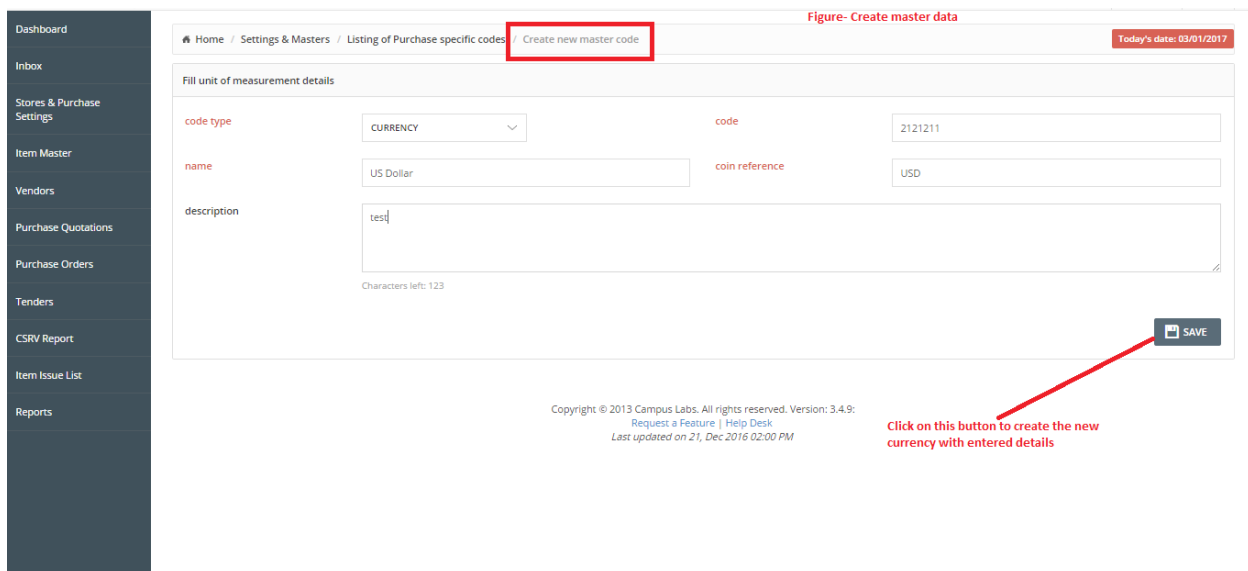
5. Enter the details like code type (select from the dropdown provided), code, name, coin reference etc.
6. Click on "Save" button.

User can create any of master data record.

Note: Click on the master name for which you want to create new record(for e.g. the steps mentioned for the master data creation which resides in "Store & Purchase Settings" menu from left menu pane). If

you want to create new Item master/Vendor, click on "Item master/Vendors" from left menu pane to reach on the screen where create button resides.

Steps of Searching:

User can follow the following steps to search data in existing data (For e.g. Searching of Units Of Measurement):

1. Click on "Stores & Purchase Settings" menu from left menu pane.
2. Click on "Units Of Measurement" Option.
3. Enter the values for Search filters (at least for mandatory filters) and if there is no filter or value is not selected for any filter all the records will be displayed (Figure-Units Of Measurements).


Figure- Units Of Measurements

4. Click on "Search" button.
5. Click on "Print List" button to take printout of Search results.

User can search the master data by following these steps.

Steps to Edit

User can follow the following steps to edit existing data (For e.g. Edit in Vendors):

1. Click on "Vendors" from left menu pane.
2. Search the values which you want to edit (using standard search steps).
3. Click on "Edit" icon.

Figure-Vendor Screen
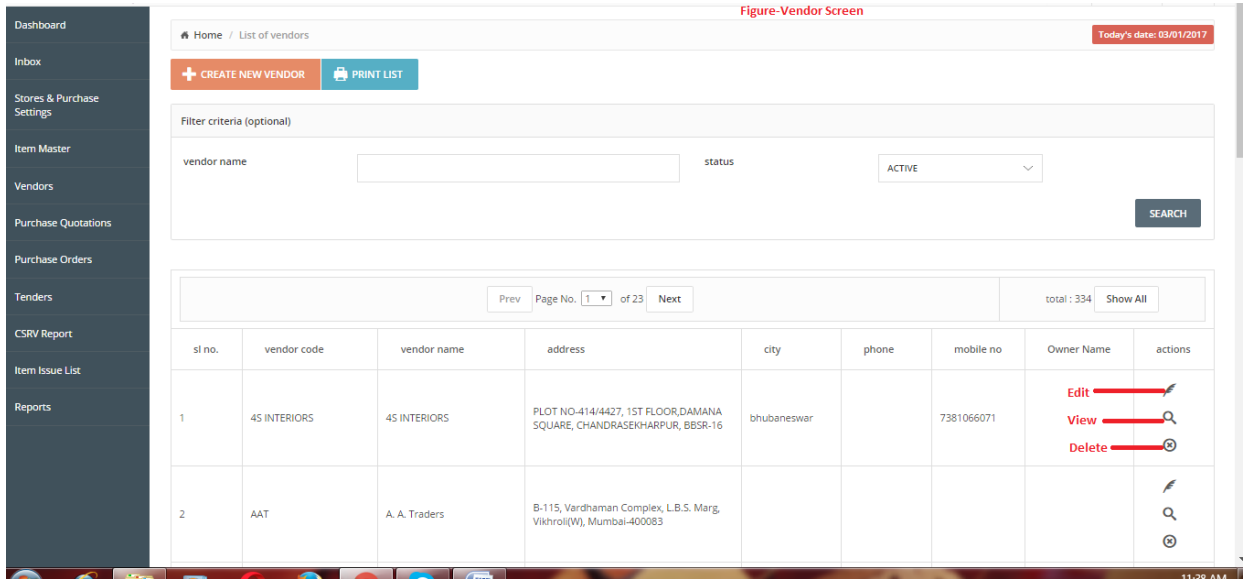
4. The form will be opened with the values (that exist currently in associated record) for editing.
5. Make changes in the values as per requirement (Below Figure-Vendor Screen).

Figure-Vendor Screen
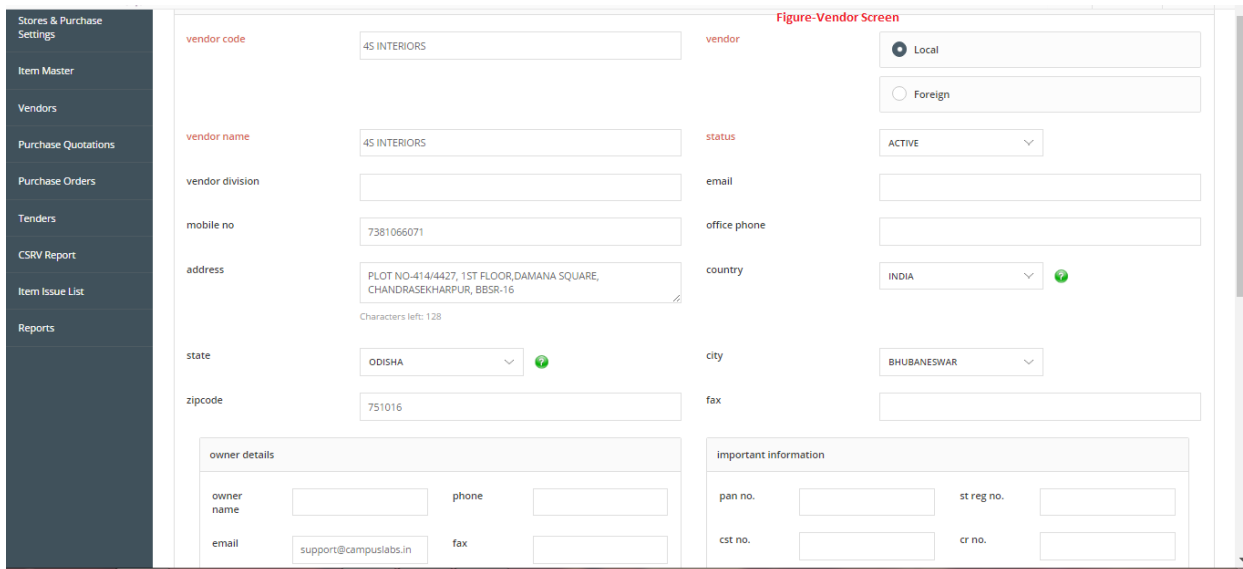
6. Click on "Save" button.

The values will be edited.

Steps to Delete

User can follow these steps to delete any existing record (For e.g. Other Master Codes):

1. Click on "Store & Purchase Settings" menu from left menu pane.
2. Click on "Other Master Codes" option.
3. Search the record which you want to delete (Using Standard Searching steps).
4. Click on delete icon associated with the record to delete the desired record.

The associated record will be deleted.

Steps To Edit/Delete Item Categories

User can add item category with standard creation steps. User needs to follow these steps to edit and delete existing Item Categories:

1. Click on "Store & Purchase Settings" from left menu pane.
2. Click on "Item Categories" option.
3. Select the Item Category which you want to edit/delete by clicking on the Item category.
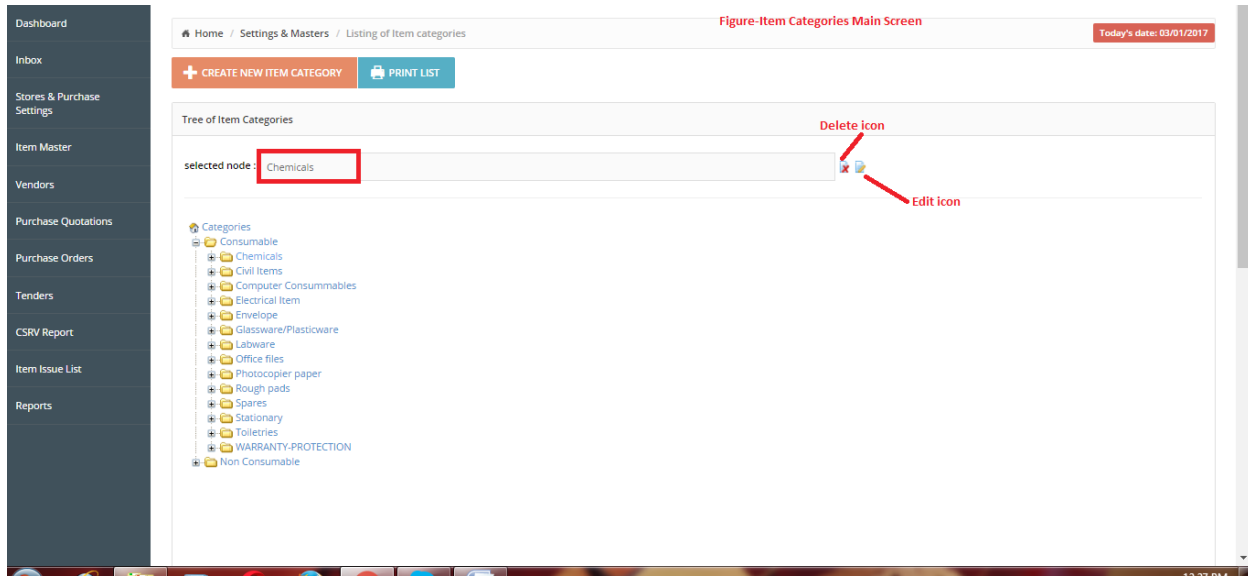
4. Click on "Delete" icon to delete the selected Item Category.
5. Click on "Edit" icon to edit the existing details of selected Item Category.
6. The form will be opened with the values (that exist currently in associated record) for editing (Figure- Item Categories Screen).
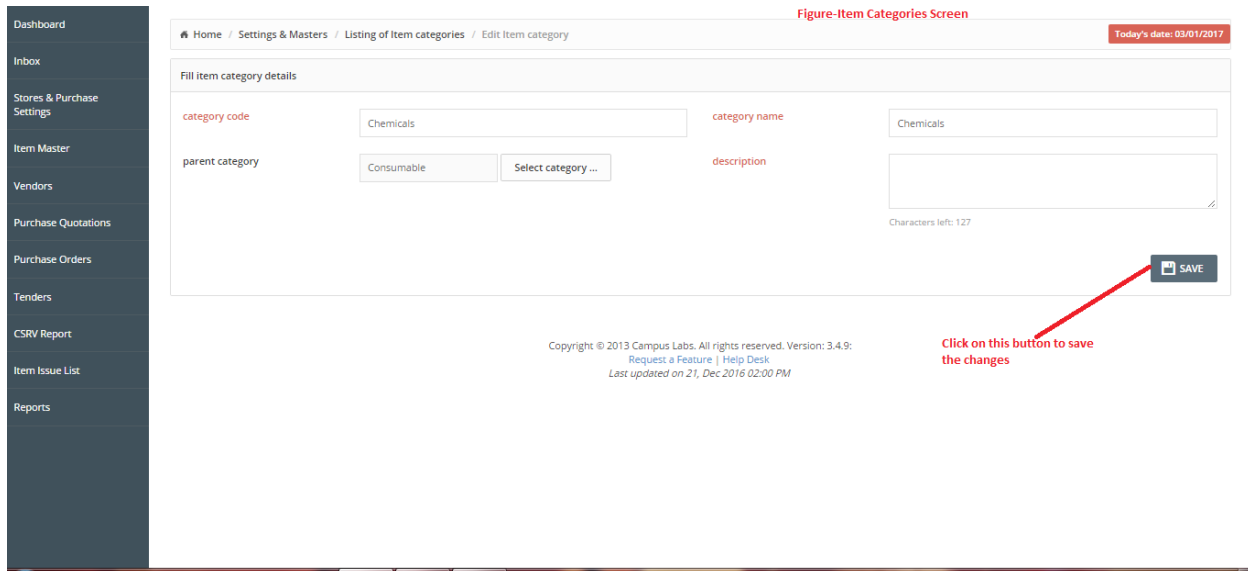
7. Change the existing values as per requirements.
8. Click on "Save" button.

User can edit/delete Item Categories with the help of these steps.