Purchase Inbox User Manual

Overview

Purchase module is used for making requests for purchase of an item(s) whether it is consumable item or non-consumable item.

E.g. If one has to purchase Hydrochloric Acid. He/She has to generate purchase request using ERP to tell the purchase requirements to related authorities.

The process of raising purchase request is called "Purchase Requisition".

Following activities are possible in purchase module:

- 1. Purchase Requisition
- 2. Updation of requirements in purchase requisition
- 3. View details and current status of raised requisition
- 4. View Indent Reports

Purchase Requisition

User can raise purchase requisition by following these steps:

- 1. Login to Campuslabs ERP using your credentials.
- 2. Click on "Purchase Inbox" menu from left menu pane.
- 3. Screen for purchase module is opened now.
- 4. Click on "Compose New" button.
- 5. Wizard for purchase request creation is opened(Figure-1).

Dashboard	Initiate					
My Courses	As you select options and fill values, form will automatically guide you for next step					
Inbox	As you select options and nil values, form will automatically guide you for next step	5.				
Hostel Inbox	IS THIS PURCHASE FOR ITEMS UNDER RATE CONTRACT?:	O YES O NO				
Hosterinbox	IS THIS PURCHASE FOR A PROJECT?:	• YES O NO				
My Links	SELECT THE PROJECT :	DST-18-0156-A1-HOMOTOP ∨				
Mentees	SELECT THE ITEM TYPE :	O Both O Consumables O Non Consumables				
	SELECT THE CURRENCY :	INR 🗸 After				
Summer Internship Selection Process		choosing the currency, coversion rates comes automatically, please wait.				
Faculty Portal	PURPOSE?:	test				
Selection Process	REQUIRED BY:	17/05/2019				
My Projects	TYPE OF PURCHASE :	OTHERS \checkmark				
Course Feedback	IS INSTALLATION REQUIRED?:	YES \checkmark				
Report	IS WARRANTY REQUIRED?:	YES V 3 years				
My Leave Appication						
My Store						
My Account		Close Next Step				

6. Purchase requisition starts from "initiate" form. As you fill details in the field the next field will be available to fill the details.

Purchase indenter can move back or forth by clicking on the buttons given at the top of the wizard and user needs to click on "Next Step" button to move on to the next form in the wizard.

Form details:-

- *a. Initiate:* In this form the user needs to fill the details regarding initiation of the purchase requisition. User needs to answer some simple questions regarding purchase in this form like: vender, item, currency, purpose of purchase etc.
- *b. Fill Items:* Fill items form is with the purpose of putting in the details of items for which you are creating purchase requisition like user need to select the items for purchase, prices of items, quantity etc.
- c. Taxes and Discount: User needs to fill the details regarding taxes and discount related to the purchase like tax formula, tax amount/percentage etc.
- *d.* Upload Attachments: User can upload documents related to requisition(if any required) under this form of requisition wizard.
- *e. Create Workflow:* User needs to select the name of related authority from the dropdown to whom the request shall be forwarded with remarks entered in the remarks field.
- *f. Review and submit:* User can check out all the details which was filled in each form in wizard here all together and review it before final submit of the requisition and than submit the requisition by clicking on "Save & send" button(figure-2).

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Dashboard			1-12 of 12	>
My Courses History	cor Inbo	Initiate Fill Items Taxes & Discount Upload attachments Create Workflow As you select options and fill values, form will automatically guide you for next steps.		10/11/2016
Registrations	Sen	And select options and his values, for its will accompare in galace you for next steps.	DLOGY	
Teaching Note Evaluation	Drat Arch	IS THIS PURCHASE FOR ITEMS UNDER RATE CONTRACT?: • YES • NO figure-2 IS THIS PURCHASE FOR A PROJECT?: • YES • NO figure-2 SELECT THE ITEM TYPE : • Consumable • NonConsumable • Both	-CSRV-257]	10/06/2016
Purchase Inbox My Projects	Inde	SELECT THE CURRENCY : After choosing the currency, coversion rates comes automatically, please wait,	-CSRV-259]	10/06/2016
		PURPOSE?: testing	-CSRV-183]	09/23/2016
		Already added items ITEMS TOTAL: 3,042.00 INR	-CSRV-186]	09/23/2016
		1: 00010-100G-ABIETIC ACID X 13 Items @ 234 INR= 3042 INR	-CSRV-184]	09/23/2016
			-CSRV-121]	09/14/2016

Purchase indenter is provided with the purchase indent number and the purchase indent/request is sent to the next person as per created workflow for further processing.

Updation of purchase Request

When user click on close button before clicking on "Save & Send" button, the purchase request is saved in drafts.

User can do the following :

- 1. Edit the draft
- 2. Delete the saved draft

Edit the Draft

The user can follow these steps to edit a purchase request:

- 1. Click on "Purchase Inbox" menu from left pane.
- 2. Click on "Drafts" option (Figure-Draft).

Dashboard	Fi	igure-Draft		Click on this button to edit the draft	Click on th delete the	is button to 🔇 📏 draft
My Courses History	COMPOSE NEW	Dr.Harapriya Mohapatra	Draft	Purchase Request [Draft saved at 29/11/2016 12:35]	Ŵ	Today at 12:58 PM
lostel Inbox	Inbox Sent Items	Dr.Harapriya Mohapatra	Draft	Purchase Request [Draft saved at 28/11/2016 10:14]	ŵ	Yesterday at 10:14 PM
egistrations	Draft (19)	Dr.Harapriya Mohapatra	Draft	Purchase Request [Draft saved at 28/11/2016 10:12]	ά	Yesterday at 10:12 PM
Feaching Note	Archived Items	Dr.Harapriya Mohapatra	Draft	Purchase Request [Draft saved at 28/11/2016 10:07] 🖉	ά	Yesterday at 10:07 PM
Purchase Inbox		Dr.Harapriya Mohapatra	Draft	Purchase Request [Draft saved at 28/11/2016 09:36]	ΰ	Yesterday at 9:36 PM
/ly Projects		Dr.Harapriya Mohapatra	Draft	Purchase Request [Draft saved at 28/11/2016 09:35]	Ū	Yesterday at 9:35 PM
		Dr.Harapriya Mohapatra	Draft	Purchase Request [Draft saved at 28/11/2016 09:34] 🖉	Ū	Yesterday at 9:34 PM
		Dr.Harapriya Mohapatra	Draft	Purchase Request [Draft saved at 28/11/2016 09:25]	ΰ	Yesterday at 9:25 PM
		Dr.Harapriya Mohapatra	Draft	Purchase Request [Draft saved at 28/11/2016 09:16]	Ū	Yesterday at 9:49 PM
		Dr.Harapriya Mohapatra	Draft	Purchase Request [Draft saved at 28/11/2016 09:12]	ά	Yesterday at 9:12 PM

- 3. Open the desired purchase request draft by clicking on edit button related to the draft.
- 4. This will open purchase requisition wizard with already filled details, user can edit the details(Figure-Edit Draft).

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Dashboard	Edit Draft saved at 29/11/2016 12:35 by Dr. Harapriya Mohapatra	< >
My Courses History	Initiate Fill Items Taxes & Discount Upload attachments	Today at 12:58 PM
Hostel Inbox	As you select options and fill values, form will automatically guide you for next steps.	Yesterday at 10:14 PM
Registrations	IS THIS PURCHASE FOR ITEMS UNDER RATE CONTRACT?: YES NO SELECT THE VENDOR : AAT-A. A. Traders change	Yesterday at 10:12 PM
Teaching Note Evaluation	SELECT THE VERDOR. CONSIST Subject of the VERDOR. Solution of the VERDOR. Subject of the VE	Yesterday at 10:07 PM
Evaluation Purchase Inbox	resistance determinants in gram negative opportunistic bacterial isolates, change SELECT THE ITEM TYPE: O Consumable Sector	Yesterday at 9:36 PM
My Projects	SELECT THE CURRENCY : INR @ 1 PURPOSE?: research purpose	Yesterday at 9:35 PM
	IS INSTALLATION REQUIRED?: change IS WARRANTY REQUIRED?: 1 change	Yesterday at 9:34 PM
		Yesterday at 9:25 PM
	Close Next Step	Yesterday at 9:49 PM
	Dr.Harepriya Mohapatra Draft Purchase Request [Draft saved at 28/11/2016 09:12] 🖉 📋	Yesterday at 9:12 PM

Note: Purchase indenter can update a purchase request before sending it(click of "Save & Submit" button).

Deletion Of Saved Draft

Saved draft can be deleted by following simple steps:

- 1. Click on "Drafts".
- 2. Click on "Delete" button related to the draft to delete the saved draft(Figure-Draft).

View details and current status of Purchase Request

Purchase indenter can check the current status of his/her purchase request with the request itself. Purchase indenter can follow these steps:

- 1. Click on "Sent Items".
- 2. The current status is shown with sent purchase request(figure-3).

Dashboard					1-6 of 6 🔇 💙
My Courses	COMPOSE NEW -	Dr. Anandam Banerjee	Requested	Purchase Request [C-00005-DST-18-0156-19-20] Type: NON RC Project: A1-HOMOTOPY AND BIRATIONAL GEOMETRY	last Monday at 10:40 AM
Inbox Hostel Inbox	Sent Items Draft (10)	Mr. Mukesh Kumar,Dr. Anan (2)	ltems Partially Issued	Stores Receipt [C-000004-DST-18-0156-19-20-PO-2-GR-2] Vendor: Ananya Enterprises PO No.: C-00004-DST-18-0156-19-20-PO-2	05/08/2019
My Links Mentees	Archived Items	Dr. Anandam Banerjee,- De (3)	PO Created	Purchase Request [C-000004-DST-18-0156-19-20] Type: NON RC Project: A1-HOMOTOPY AND BIRATIONAL GEOMETRY	05/08/2019
Summer Internship Selection Process		Dr. Anandam Banerjee	Requested	Purchase Request [C-000003-DST-18-0156-19-20] Type: NON RC Project: A1-HOMOTOPY AND BIRATIONAL GEOMETRY	05/07/2019
Faculty Portal Selection Process		Mr. Mukesh Kumar,Dr. Anan (2)	Approved	Stores Receipt [C-000002-DST-18-0156-19-20-PO-1-GR-1] Vendor: Ananya Enterprises PO No.: C-000002-DST-18-0156-19-20-PO-1	04/15/2019
My Projects Course Feedback		Dr. Anandam Banerjee,- De (4)	PO Created	Purchase Request [C-000002-DST-18-0156-19-20] Type: NON RC Project: A1-HOMOTOPY AND BIRATIONAL GEOMETRY	04/15/2019
Report My Leave Appication		© 201	7 All rights reserved. V	ersion: 4.0.3:	
My Store					
My Account					

Description for Statuses

User can relate the meaning of different statuses with the description provided:

- 1. *Requested*: This is the primary status of purchase request. When a new purchase request is submitted its status is shown as "Requested".
- 2. *Forwarded*: When a request is forwarded from one authority to another the status of request becomes "Forwarded".
- 3. Financial Approval: When purchase request gets financial approval the status of purchase request becomes "Financial Approval".
- 4. Forward To Purchase: When a request is forwarded to purchase department its status becomes "Forwarded to Purchase".
- 5. Call For Tender: When purchase department call for tenders to purchase the items related to your purchase request its status becomes "Call For Tender".
- 6. PO Created: When Purchase order is created for your purchase the status of purchase request becomes "PO Created".
- 7. Tender Approved: When tender is approved the status of application becomes "Tender Approved".
- 8. Dispatch to Vendor: The status of purchase request becomes "Dispatch To Vender" when the purchase order related to your purchase request is forwarded to the vendor.
- 9. *Items Received*: When request items received at store section of the institute the status of purchase request becomes "Items Received".

View Indent Reports

Faculty can follow these steps to view Indent Report:

- 1. Click on "Inbox" from left menu pane.
- 2. Click on "Indent Report" option, indent report page will be opened.

n a narpy				Fig	ure-Indent Report Page	
Dashboard	6 Home / Purchase Inbox / Indents Report	Search Fil	Iters			Today's date: 16/12/2016
Inbox	Item Type	SELECT	~			
	Purchase Indent From Date	01/04/2016		Purchase Indent To Date	31/12/2016	
	Status	SELECT	× 0	Search		
	© 2014. Campus Labs Prc. Ltd.			election of values for search sults		٥

- 3. Select the values for Search filters.
- 4. Click on Search button, the results of search will be shown (Figure-Indent Report).
- 5. Click on Excel button to download the search results in Excel Format.
- 6. Click on PDF button to download the search results in PDF Format.