Store and Purchase Admin

Overview

Store and purchase admin user can do purchase management and store management related activities.

E.g. Store and purchase admin can create the new data for store(like new store, store item, list of measurement, vendors) and purchase(like item category, tax formula, currency). Store and purchase admin user can perform different transactions like user can issue gate pass to vendors, enter quotation, finalize quotations.

Store and Purchase admin user can use the following modules:

1. Stores Management
2. Purchase Management
3. Purchase Inbox
4. Purchase CSRV
5. Purchase Orders

Master Data: Data that is required/pre-requisite to drive a functionality is known as "Master Data".

Store Management Module

Store and purchase admin can perform store related tasks. Following are the store related activities:

a. Activities related to Master data(For new Store/item/Vendor)
b. Reports

a. Master Data related Activities:-

Master data related to store module are like new store, item master, new store item, make, Unit of measurement, vendors etc. Following are the possible activities for store and purchase admin related to Store module:
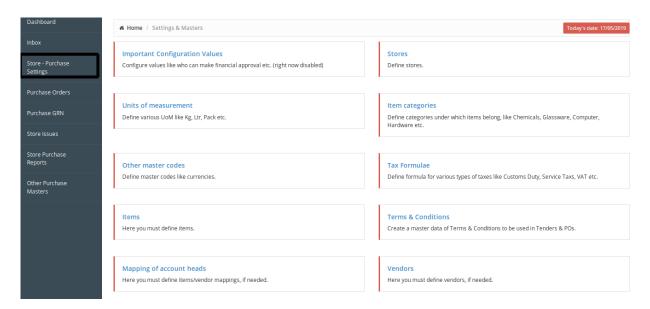
i.)   Creation of new mater data
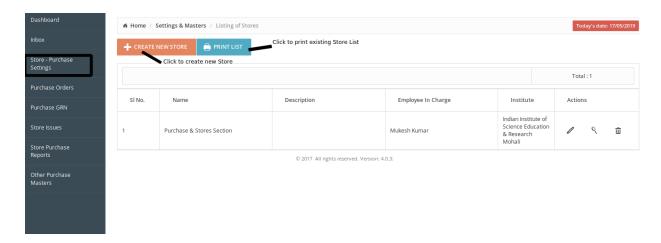ii.)   Search, update and delete already created master data

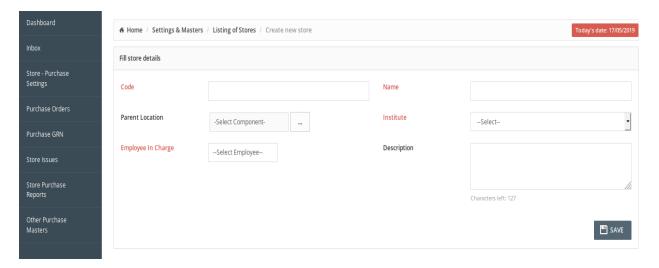## *Standard Steps(Addition, updation, searching, deletion)*

i.)Creation of Master Data: Store and purchase admin can follow these steps to create any of the master data(E.g. steps provided are related to creation of Store):

➤ Login to Campuslabs ERP using your credentials.
➤ Click to "Store- Purchase Settings" module and select "Store " option.
   The screen for store related activities is opened(figure-1).

Click to print existing Store List

Click to create new Store

- Click on "Create New Store" button(shown in figure).
- Form to create new store is opened.
- Fill data related to new store like store code, location name, for which campus this store will be related to, person in charge etc.
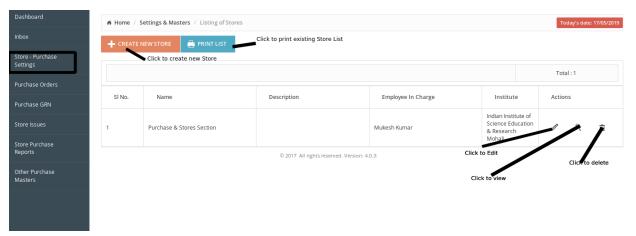- Click on save button as shown in below screenshot.

This will create the new store in the system with details filled in the form.

ii.)Searching , updation and deletion in Master Data: Searching record is prerequisite for making updation and deletion of the record. Store and purchase admin can follow these steps for any activity with master data(E.g. steps provided are related to Store master):

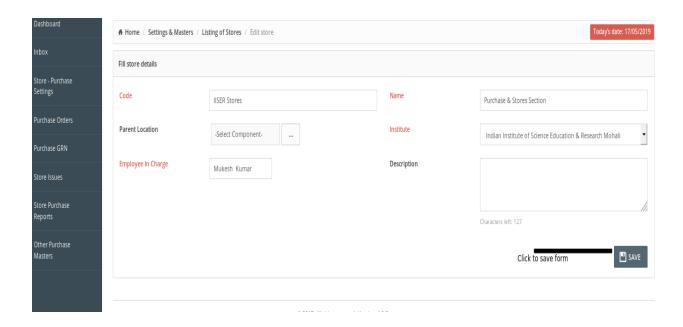- Click to "Store- Purchase Settings" module and select "Store " option.

The screen for store related activities is opened(figure-1).

> Click on "Store" will display all existing stores.
> Click on "Go" button for searching already created data(figure-1).After these steps the search results will be shown on the screen.
> From here you can either edit or delete a record.

Edit:
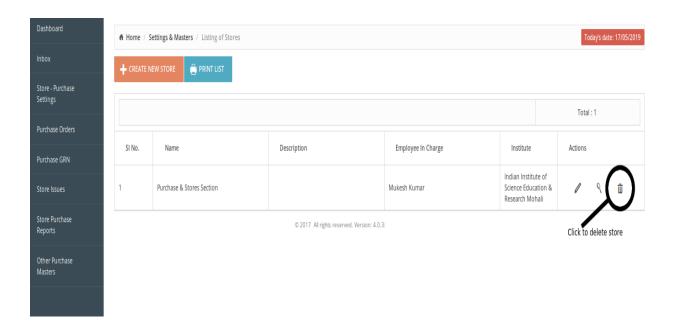
> Click on edit button(figure-store_update).
> The form with already filled details opened. Change the values according to the requirement.
> Click on save button as shown in below screenshot.

After these steps the record will be updated.

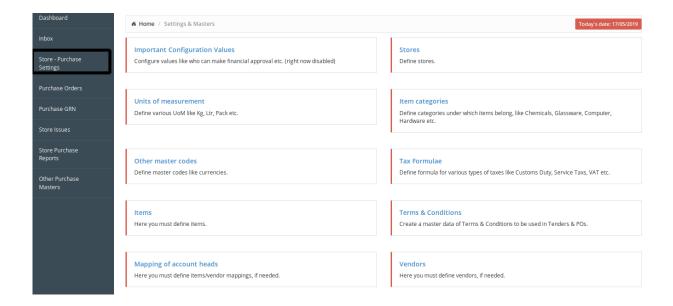➢ Click on "Delete" button to delete a record(figure-Actions).

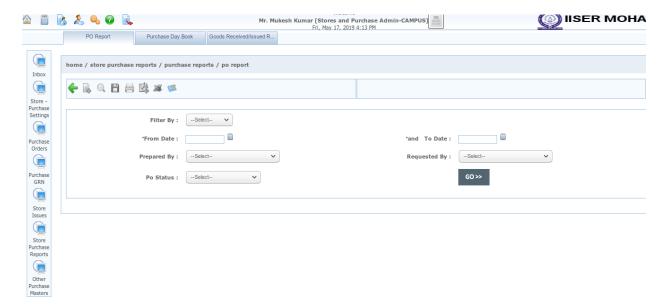After these steps record will be deleted.

Purchase Management Module

Store and purchase admin can perform purchase related activities using purchase model.

Following are the possible activities for store and purchase admin related to Purchase module:

a. Purchase Masters related activities
b. Purchase Reports

a. Purchase Masters:- Following are the activities for store and purchase admin related to purchase masters:

      i.)   Creation of new masters data

      ii.)   Search, update and delete already created master data

Following are Purchase Masters:

i.)Creation of Master Data: Store and purchase admin can follow standard steps to create any of the master data.

ii.)Searching , updation and deletion of Master Data: Searching record is prerequisite for making updation and deletion of the record. Store and purchase admin can follow standard steps for any activity with master data.

b. *Purchase Reports:-* User is provided here with different types of reports related to the purchase module which are displayed in figure-7.

For having data of any report user need to follow the standard steps for search.

Purchase Inbox

This is gmail like inbox functionality to ease the request/approval tasks of the user. Any request comes to the user between the purchase process comes in the mail format under this module. The user can open the mail by double clicking on it and can proceed further as per his/her privileges.

Purchase Orders

Through this option the user can search purchase orders with different statuses and can proceed for the further processes such as creation of csrv, exemption certificates etc.

CSRV Reports

With the help of this menu the user can search the csrv requests and can proceed for further processes such as issue items to indenter etc. as per his/her privileges.