

Inventory & Warehouse

- Material Requests

Material Requests

Overview

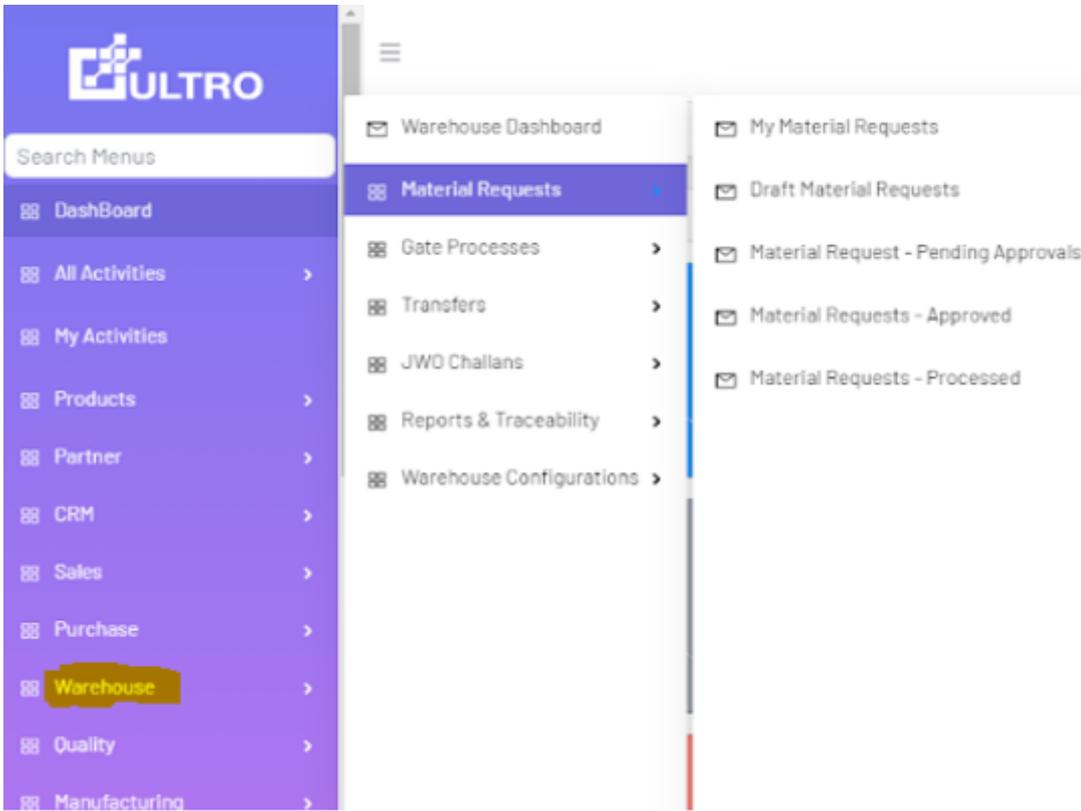
The Material Request (MR) module in Ultro streamlines the process of requesting, approving, and tracking materials requests within the organization.

By following these steps, users can efficiently create their material requests and keep track of their statuses, and manage its lifecycle.

Material Request Navigation

To access the Material Request module:

1. Navigate to Warehouse → Material Request.
2. Select the desired status from the available menu options:
 - o My Material Request: View all material requests created by the logged-in user.
 - o Draft Material Request: Lists all material requests in draft status.
 - o Material Request - Pending Approvals: Shows requests awaiting approval.
 - o Material Request - Approved: Displays all approved material requests.
 - o Material Request - Processed: Contains requests that have been processed for further action.

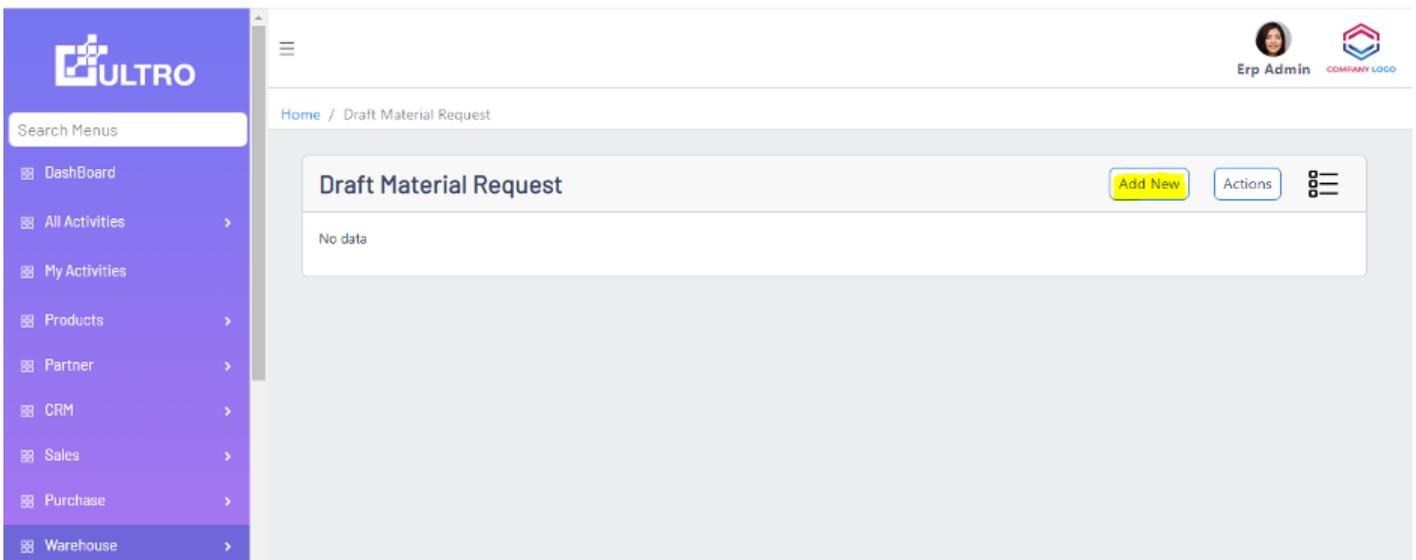


Creating a Material Request

Follow these steps to create a new material request:

Step 1: Open the Material Request Form

1. Click the Add New button.
2. A new Material Request form will open.



Step 2: Fill Out Mandatory Information

1. Select the Warehouse where the material will be used or stored.
2. Specify the Location within the warehouse.
3. Choose the relevant Project the material is associated with.
4. Add the required Material details.

Material Requests

Process MR
Next Action
Print
Save
Close
New

Draft

Request ID

Request Date

Warehouse*

Partner

Projects

Requested By

Target Date

To Store/Location*

Manufacturing Order

Material Request Line
Requestor Details

Material Request Line

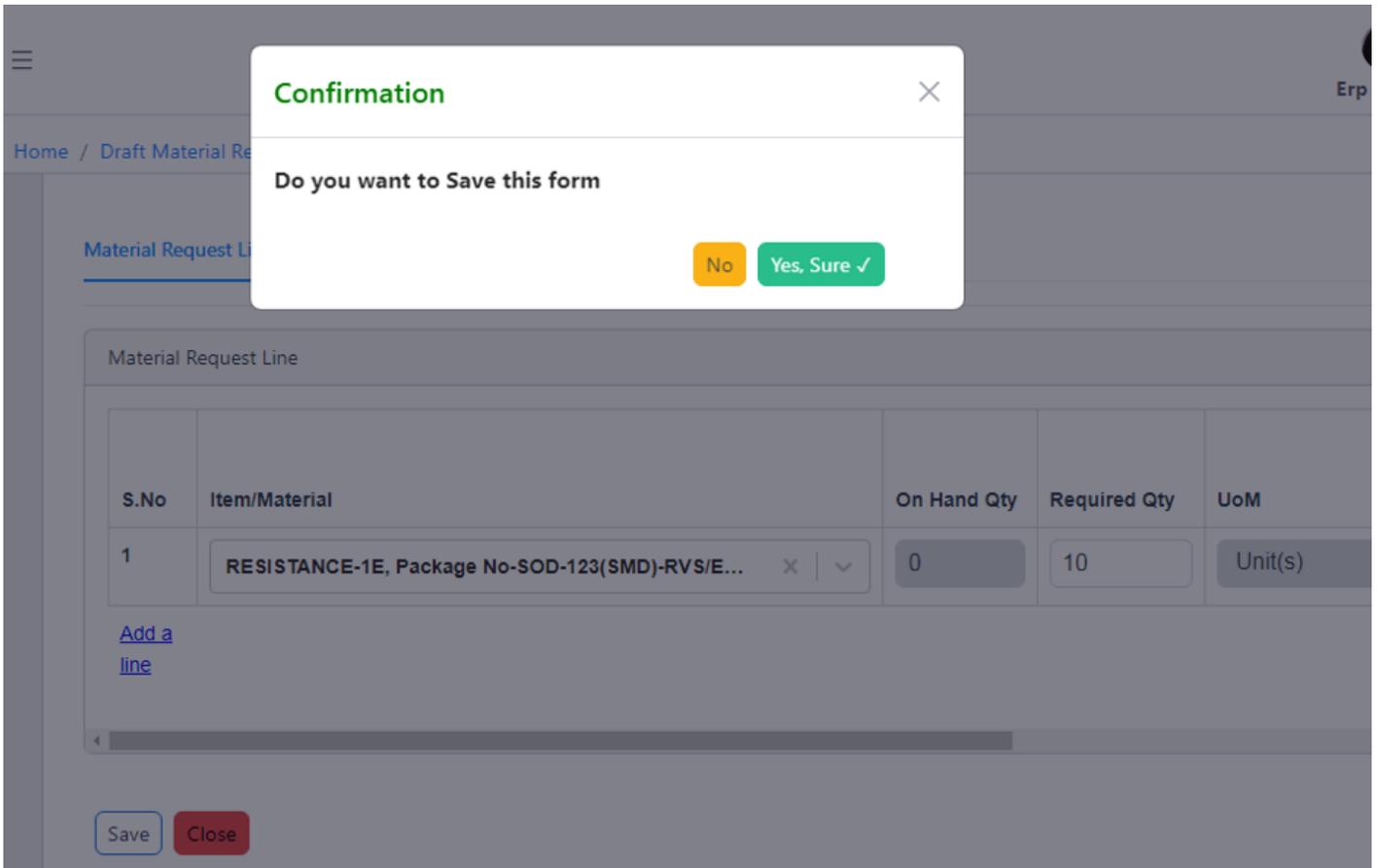
S.No	Item/Material	On Hand Qty	Required Qty	UoM	Ope
1	RESISTANCE-1E, Package No-SOD-123(SMD)-RVS/... <input type="text"/>	0	10	Unit(s)	10

[Add a line](#)

Save
Close

Step 3: Save the Material Request

1. After entering all the mandatory information, click the Save button.
2. A confirmation dialog will appear. Confirm the save action to create the Material Request record.



Submitting a Material Request for Approval

Once the Material Request is created, follow these steps to send it for approval:

1. Navigate to the Next Action section in the Material Request.
2. Click Send for Approval.
3. The status of the Material Request will change from Draft to Pending Approval.

Material Requests Process MR Next Action ▾ Print ▾ Update Close

Request ID: MR/0032

Request Date: 03/12/2024 07:35:22.098 AM

Warehouse*: RVS D-59

Partner: Select ▾

Requested By: Admin

Target Date: 03, 2024

To Store/Location*: 59/Stock

Manufacturing Order

Next Action ▾

- Approval Workflow
- Duplicate
- Audit History
- Add Activity
- Show All Activities
- Send for Approval**

Home / Draft Material Request / Material Request Form

Pending Approval ✕

Material Requests Process MR Next Action ▾ Print ▾ Update Close New 📁 Pending Approval

Request ID: MR/0032

Request Date: 03/12/2024 07:35:22.098 AM

Warehouse*: RVS D-59 ▾

Partner: Select ▾

Projects: OLT Installation ▾

Requested By: Erp Admin ▾

Target Date: Dec 03, 2024

To Store/Location*: D-59/Stock ▾

Manufacturing Order

Approval Process

After submission:

1. The approver will review the Material Request.
2. If approved, the status will change to Approved.

Material Requests [Process MR] [Next Action] [Print] [Update] [Close] [New] [Folder Icon] **Pending Approval**

Request ID: MR/0032
Requested By: Admin
Request Date: 03/12/2024 07:35:22.098 AM
Target Date: 03, 2024
Warehouse*: RVS D-59
To Store/Location*: 59/Stock
Partner: Select
Manufacturing Order: [Greyed out]
Projects: OLT Installation

Dropdown menu options:
Approval Workflow
Duplicate
Audit History
Add Activity
Show All Activities
Approve

Material Requests [Process MR] [Next Action] [Print] [Update] [Close] [New] [Folder Icon] **Approved**

Request ID: MR/0032
Requested By: Erp Admin
Request Date: 03/12/2024 07:35:22.098 AM
Target Date: Dec 03, 2024
Warehouse*: RVS D-59
To Store/Location*: D-59/Stock
Partner: Select
Manufacturing Order: [Greyed out]
Projects: [Greyed out]

Processing the Material Request

1. Once approved, the Material Request can be processed further.
2. Processed Material Requests are visible in the Material Request - Processed section.

Key Notes

- Draft Material Requests: Can be edited before sending for approval.
- Pending Approvals: Only requests awaiting approval are visible here.
- Processed Requests: Requests moved forward for additional actions.