

Inventory & Warehouse

- Material Requests

Material Requests

Overview

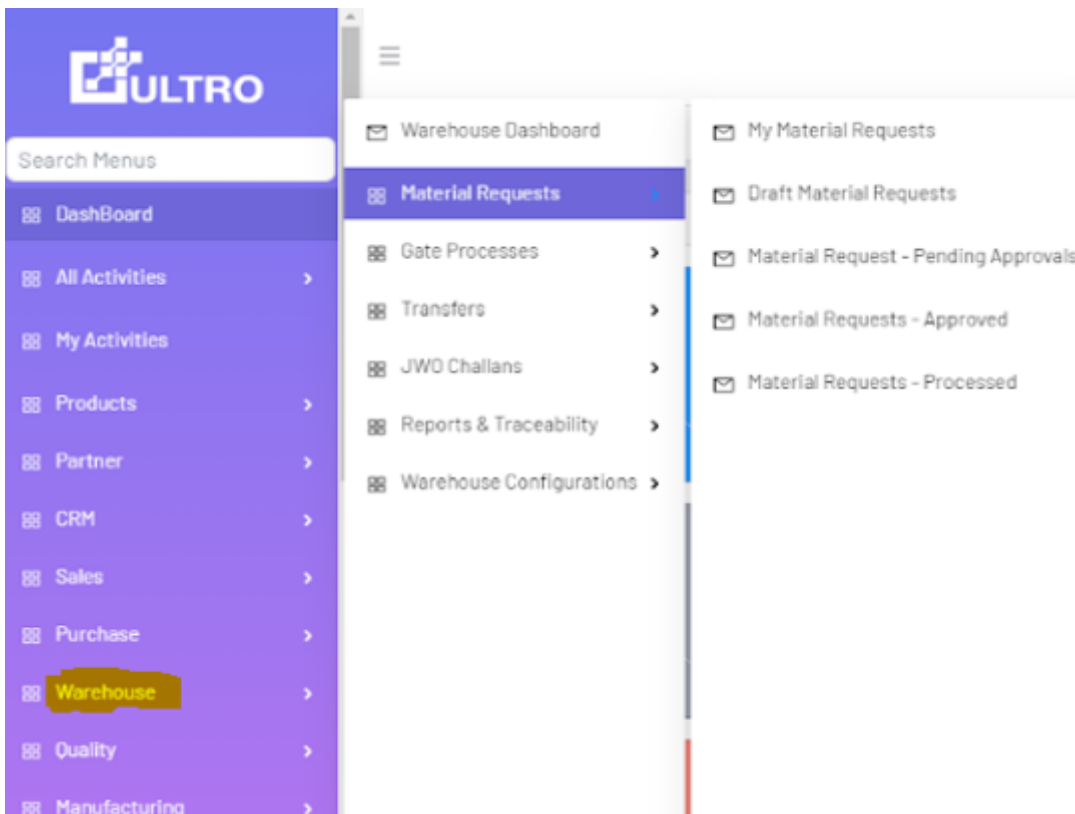
The Material Request (MR) module in Ultro streamlines the process of requesting, approving, and tracking materials requests within the organization.

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.

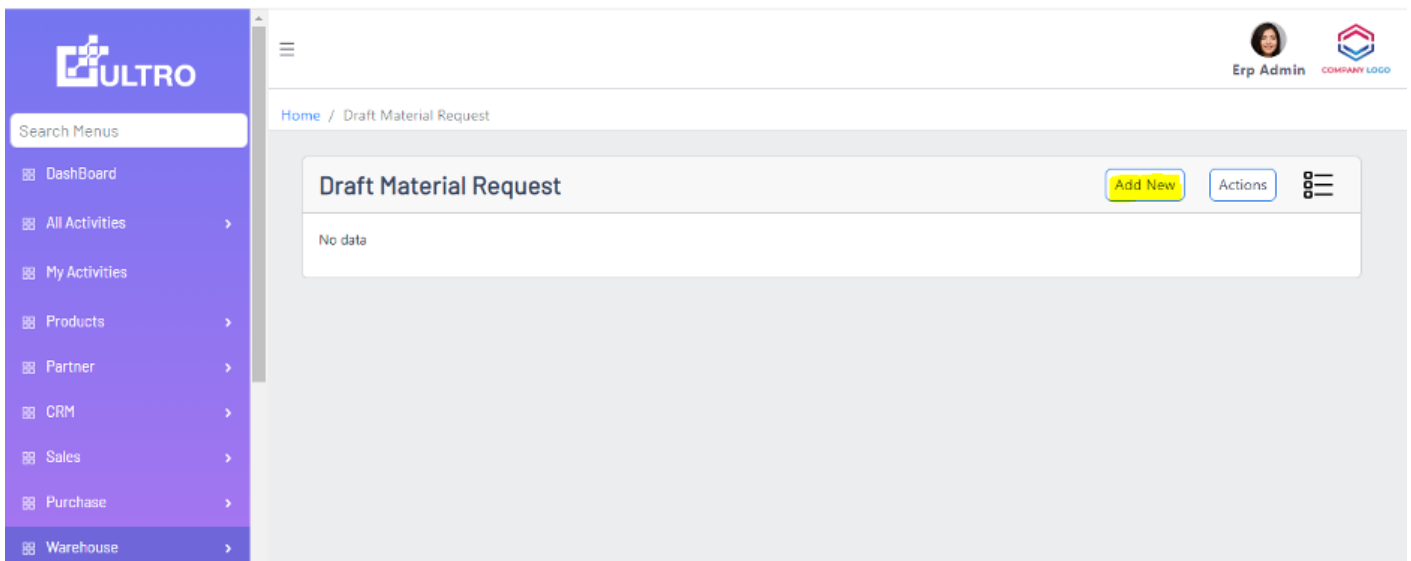


Creating a Material Request

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

Requested By

Erp Admin

Request Date

03/12/2024 12:58:45 PM

Target Date

Dec 03, 2024

Warehouse*

RVS D-59

To Store/Location*

D-59/Stock

Partner

Select

Manufacturing Order

Projects

PLT Installation

Material Request Line

Requestor Details

Material Request Line

S.No	Item/Material	On Hand Qty	Required Qty	UoM	Open
1	RESISTANCE-1E, Package No-SOD-123(SMD)-RVS/... x v	0	10	Unit(s) v	10

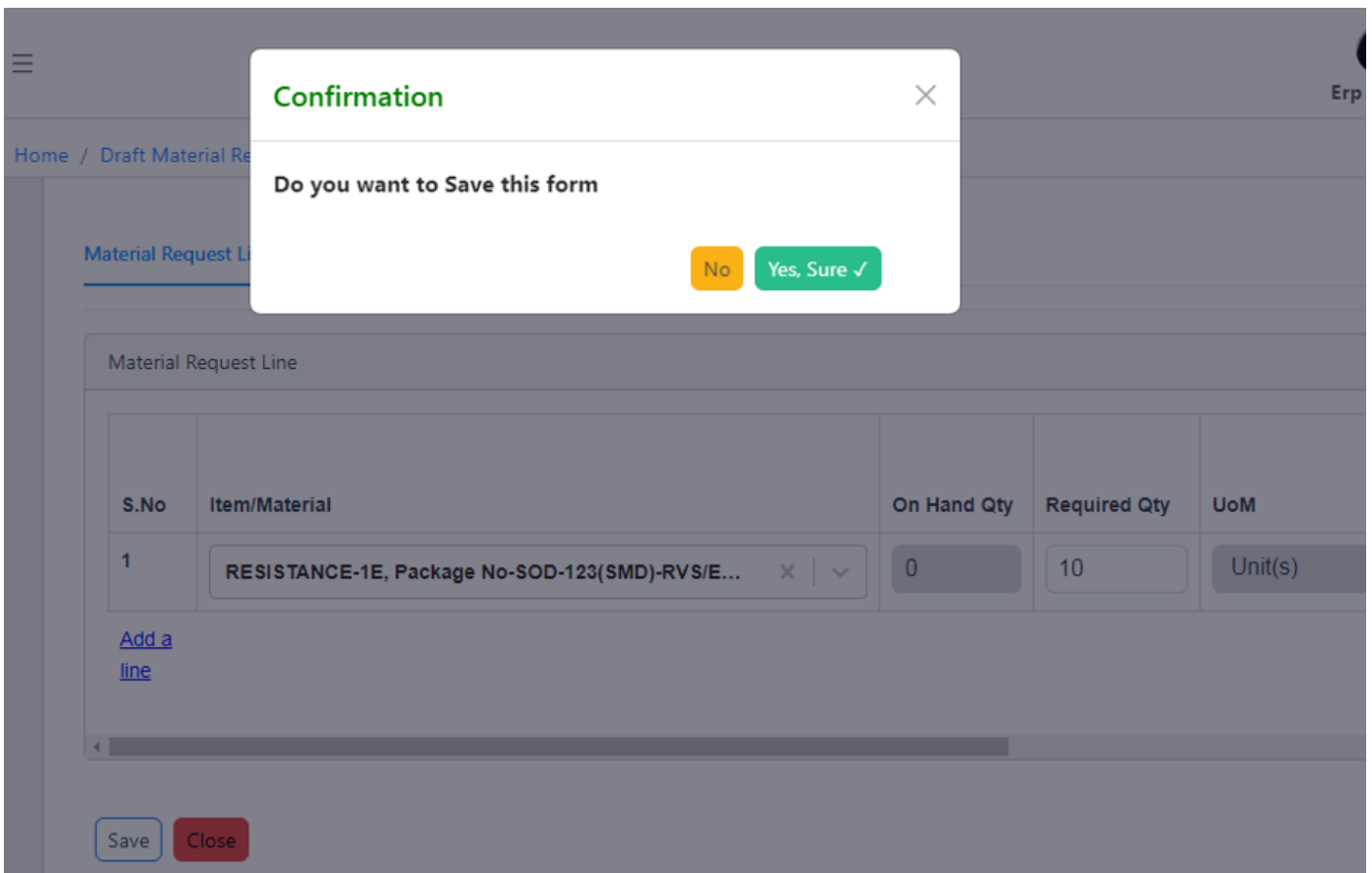
[Add a line](#)

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

Erp Admin ▾

Target Date

03, 2024

To Store/Location*

D-59/Stock ▾

Manufacturing Order

Approval Workflow

Duplicate

Audit History

Add Activity

Show All Activities

Send for Approval

Pending Approval

Material Requests

Process MR

Next Action ▾

Print ▾

Update

Close

New

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

Pending Approval

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

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*

D-59/Stock

Partner

Select

Manufacturing Order

Projects

OLT Installation

Approval Workflow

Duplicate

Audit History

Add Activity

Show All Activities

Approve

Material Requests

Process MR

Next Action

Print

Update

Close

New

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

Projects

Processing the Material Request

- Once approved, the Material Request can be processed further.
- 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.