Master Data

The **Masters** menu in the procurement module helps to define and manage the master data like items detail, suppliers, company, contact, and asset category.

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Items

The list of items that will be used in procurement module is managed in cuteOffice Items master. They are managed centrally so that duplicate items are not entered into the system.

To view items master, click **Items** submenu in the **Masters,** the item master list page opens as below,

image-1660170744605.png
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Add a New Item

To create a new item as item master,

1. click image-1660171564547.png
Image not found or type unknown button in the top right corner in item list view page, the add item page opens as below,
image-1660171744060.png
Image not found or type unknown
2. There are two mandatory information to be filled up. For example, we want to buy a desktop computer. So we have decided classify Computer as **item name** and Desktop as **item specification**
   - Item Name
   - Item Specification
3. Select the Item from list. If you can’t find the item, then click “Item Name not found? Click here to create new” link below the text box,
image-1660172078595.png
Image not found or type unknown
4. Enter item name as computer, and the item specification as desktop.
image-1660172214959.png
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5. Click Next. The below dialog appears,
image-1660172319942.png
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   - Choose a category for the item. Select Assets and Equipment (IT). Each item can be classified into more than one category. The category classification is defined by the administrator in Admin Settings.

- Select UOM. (Unit of Measurement). Choose Piece. The UOM is defined by the administrator in Admin Settings.
- Enter minimum stock level alert quantity.
- Enter lead time required to buy this item
- When issue this item, if it requires approval, click to enable flag as **Yes**, or default as **No,**
- Enter any additional description for the item.

6. Click **Submit**. Each item newly added to item master needs to be approved before it can be used in system. If item master auto approval is configured, the below dialog appears to approve immediately upon submit.

image-1660182615861.png

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7. Click **Confirm,** item will be approved and appear in item list for system use. Page will be redirected to the below screen.

image-1660182897699.png

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Edit Item

To edit item master, go to the item list page,

1. click the item key and open the item detail page as below,

image-1660183101408.png

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image-1660183134928.png

2. Click Edit button, the edit window opens up,

Image not found or type unknown

image-1660183214012.png

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3. Update details, and click **Save** to save edits.

Attach

Any photos and additional documents can be uploaded against the item.

image-1660187936089.png

1. Click Attach button, the attach window opens up,

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image-1660187985936.png

Image not found or type unknown

2. Click **Choose Files** and browse the file to attach.
3. The added item is shown below,
   image-1660188035082.png

   Image not found or type unknown
   image-1660188056241.png

4. Click Image not found or type unknown (preview button) to view attached file,
5. Click **Save** to store the attachment against the item.

Export Items

image-1661796864622.png

User can export all items master data use the export option. Click Image not found or type unknown the items master data will be export and downloaded.

Suppliers

Suppliers are managed centrally as master data in cuteOffice. All suppliers needs approval to be qualified as supplier, and system provides ranking and evaluation options.

To view all suppliers, click **Suppliers** submenu in the **Masters** menu,

image-1660338120837.png

Image not found or type unknown

Add New Supplier

All supplier companies shall be registered in company master data first, then add as suppliers master.

To add new supplier,

image-1660338837754.png
image-1660338813842.png

1. click Add button Image not found or type unknown or Image not found or type unknown, the new supplier page will open as below,

image-1660338933048.png

Image not found or type unknown

2. Select a company from the dropdown list as supplier. If the company is not available, click the link-"**Company not found? Click here to create new"** below the company dropdown and create a new company. The selected company details are shown in the right side.
   - Please check user manual on how to create company master data.
3. Select contact from contact master dropdown. The contact details will show. If the contact is not in the dropdown list, click the link "**Contact not found? Click here to create new** " to create new contact in master data.
   - Please check user manual on how to create contact master data.
4. Select rating. The ratings value are managed in Admin Options
5. Select Payment Terms. The terms are maintained in Admin Options
6. Select Currency. The currencies are maintained in Admin Options
7. Choose Grade. If A means the supplier needs evaluation. Grade B customers does not require
   evaluation. For example, if we buy Amazon, do we need to evaluate them? No. so we choose B.
   However, if we need to buy a computer from a supplier they need to be checked and evaluated
   before making an order.
8. Click Submit to create the supplier. The below dialog opens up.
   image-1660339858019.png

   Image not found or type unknown
9. Click Confirm, a new supplier is created and directed to below new supplier detail page,
   image-1682107587596.png

   Image not found or type unknown
10. All new suppliers created in system need to be approved unless auto approval is configured. To approve, click the **Approve** button in above supplier detail page, below
    image-1660337950542.png

    dialog opens, Image not found or type unknown
11. Click **Approve.** The supplier status will change to supplier approved.
    image-1682107639602.png

    Image not found or type unknown
    image-1660338011056.png

    Image not found or type unknown

12. To evaluate supplier, click the Image not found or type unknown button, below evaluation window opens.

image-1660337933652.png

Complete the evaluation and click **Save.** Image not found or type unknown

Other Options in Supplier

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There are other options available in supplier master data management.

Attach-Any related documents such as their ACRA document or any other document can be added as reference using the Attach function. Click attach button, and choose the file to upload and save.

Comment-Authorized users can make comment on the supplier for future reference by clicking the Comment button.

Export Supplier

image-1661796864622.png

User can export all suppliers data use the export option. Click Image not found or type unknown the supplier master data will be export and downloaded.

Company

Company master data manages all clients company, supplier company or any third party companies. To view company master list, click **Company** in the Master menu.

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Add New Company

To add a new company,

image-1660687295634.png

1. Click (Add button) and the new company window opens up,

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image-1660687616739.png

Image not found or type unknown

2. Enter the company name and click **Next**. The below window opens,

image-1660687658096.png

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3. Select the country
4. Enter the email address of the company
5. Enter contact number. Click + to add more contact numbers.
6. Enter Address. Click + to add more address for the same company.
7. Click **Next** and the below contacts information dialog opens up

image-1660687891893.png

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8. Select person salutation and enter the name of the contact.
9. Enter designation.
10. Enter email address of the contact.
11. Enter phone number, direct phone number etc.
12. Click **Save** to create the company and the contact under the company.

Edit Company

image-1660688476953.png

1. In the company list page, click the edit icon against the company, the company detail page will open,

Image not found or type unknown

image-1682107732935.png

Image not found or type unknown

2. Edit the company details and click **Save**.

Delete Company

image-1660688625741.png

1. Click Image not found or type unknown Delete icon against the company that user wants to delete,

   image-1682107787324.png

   Image not found or type unknown
2. A confirmation window opens as below, click **Yes** and the company will be deleted.
   image-1660688707678.png

   Image not found or type unknown

Export Company

image-1661796864622.png

User can export all company data use the export option. Click Image not found or type unknown the company master data will be export and downloaded.

Contacts

Contacts master contains all contacts data from company master. Contacts master can be added in company master contact tab as well as contact master. To view contact master list, click **Contacts** in the Master menu,

image-1682107852099.png

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Add New Contact

To add new contact,

image-1660696628700.png

image-1660338813842.png

1. Click Image not found or type unknown (Add button) and the new contact window opens up, Image not found or type unknown
2. Select the salutation and enter the contact name.
3. Click and select company name, then click **Next,** the contact detail window opens,
   image-1682107905508.png

   Image not found or type unknown

- If the company already exists in company master, it will appear in the company dropdown list
- If the company not exist in company master yet, click the link "Company not found? Click here to create new" to add company in master data.

4. Select person salutation and enter the name of the person
5. Enter designation
6. Enter email address of the person
7. Enter phone, direct phone number etc.
8. Click **Save** to create the contact and it is created under the company.

Or alternatively, create contact under company master:

1. Click Company in Master menu, select the company from which the new contact come, image-1682107967744.png

   Image not found or type unknown
2. Click the contact tab as in above screenshot, the contact detail page opens. image-1660697382240.png
3. Click Image not found or type unknown icon at the bottom left side to add new contact. The new contact page will open.
4. Select person salutation and enter the name of the contact.
5. Enter designation
6. Enter email address
7. Enter phone, direct phone number etc.
8. Click **Save** to create the contact under the company. The contact data will be saved in contact master as well.

Edit Contact

image-1660688476953.png

1. In the contact list page, click Image not found or type unknown the edit icon against the contact, the contact detail page will open.
2. Edit the contact details and click **Save**.

Delete Contact

image-1660688625741.png

1. Click Image not found or type unknown Delete icon against the contact that user wants to delete,
2. Click Yes to confirm deletion.

image-1660697761656.png

Image not found or type unknown

Export Contact

image-1661796864622.png

User can export all contact data use the export option. Click Image not found or type unknown the contact master data will be export and downloaded.

Asset Category

To view all current asset category, click **Asset Category** in Master menu,

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Add New Asset Category

To add new asset category,

image-1660338813842.png

1. click Image not found or type unknown in the asset category list view page. The new asset category window opens,
   image-1660698093565.png

   Image not found or type unknown
2. Enter category name and abbreviation, or any remarks.
3. Click **Save**. A new asset category is added.

Edit Asset Category

image-1660688476953.png

1. In the asset category list page, click Image not found or type unknown the edit icon against the category, the asset category detail page will open.
2. Edit the details and click **Save**.

Delete Contact

image-1660688625741.png

Image not found or type unknown

1. Click Delete icon against the asset category that user wants to delete,
2. Click **Yes** to confirm deletion in the confirmation window.

Add Sub-category under Asset Category

To add sub category of an asset category, click the add icon in the Add column against each asset category.

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Export Asset Category

image-166179710043

User can export all asset category data use the export option. Select and click the asset Image not found or type unknown category master data will be export and downloaded in selected format.

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