ENTERING
Electronic Material Request’s
In FMS
For PLANNERS
You can access Electronic Material Requests in two ways, Option 1 is right from the Work Management Menu. Click on the new Material Request icon.
Option 2 is to click on the Material Request icon right from the Phase screen of the Work Order.
IF you clicked the icon directly from the phase, required fields will be pre-populated for you. If you used Option 1 key your data into the Work Order and Phase field.
Click on the calendar icon and choose a Date Needed.
Click on the green plus icon in the Line Item bar to add an item.
Click on the correct option. **Until Inventory is added in most cases you will be choosing Add NonStock Part.**
Key in the description of the item you would like ordered.
Click on the Magnifying Glass next to the Contractor field.
Choose the correct vendor by clicking on the Contractor number. **If you don’t know what vendor the item will be purchased from, use “MATREQUEST”.”
Key in the Manufacturers part number (preferred) or the Vendors part number in the Part field.
Click on the magnifying glass next to the UOM field.
Click on the correct Unit of Measure for what you need ordered.
Key in the quantity of the item you need in the Quantity field.
Key in the correct cost into the Unit Cost field. **If you do not know the cost enter 0.01**
Click on the green flag icon.
Repeat the process of the last II pages if you need to add another item. If you have any pertinent documents for the transaction such as quotes, drawings or specifications you can upload to Related Documents. Click on the dropdown menu.
Click on the new document icon.
Click on the Choose File button.
Navigate to where you have the document saved on your computer. Click on the document you need to upload.  

Click on the Open button.
Click on the Green Arrow Icon.
You can rename the document if you wish. **It is best to name it something relevant.**

Click on the Type magnifying glass.
Click on GENERAL.
Click on Green Arrow icon.
Click on the Green Arrow icon again.
Click on the Green Arrow yet again.
Click on the Green Flag.
Type a note in the Description box alerting Material Service that you uploaded pertinent documents.
Click on the Status magnifying glass.
Click on the APPROVED Status.
Click on the SAVE icon.