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Getting Started

ADAM

Analyse . Digitalise . Automate . Manage

Company Profile & Features

ADAM - Settings : Company Profile

Side-menu:

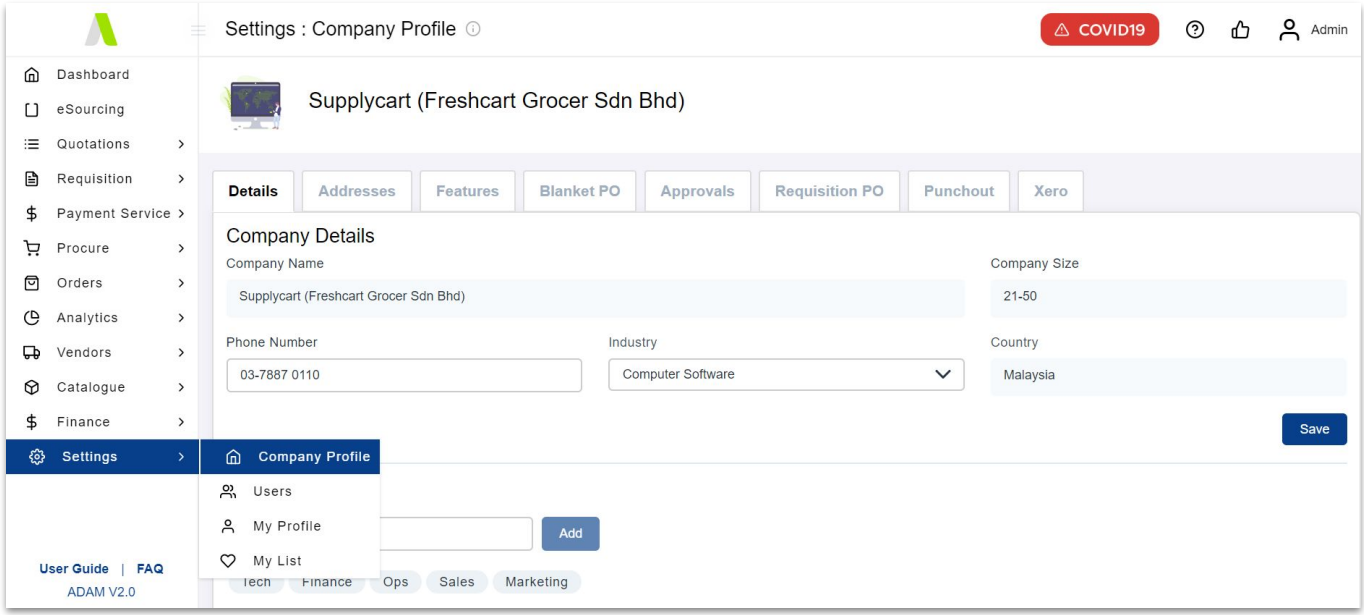
Settings > Company Profile

Page purpose:

1. Set up Company Details
2. Set up Features & Controls

Features:

1. Department Setup
2. Address Management
3. ADAM Feature Setup
4. Blanket PO Controls
5. Approval Controls
6. ADAM-generated PO



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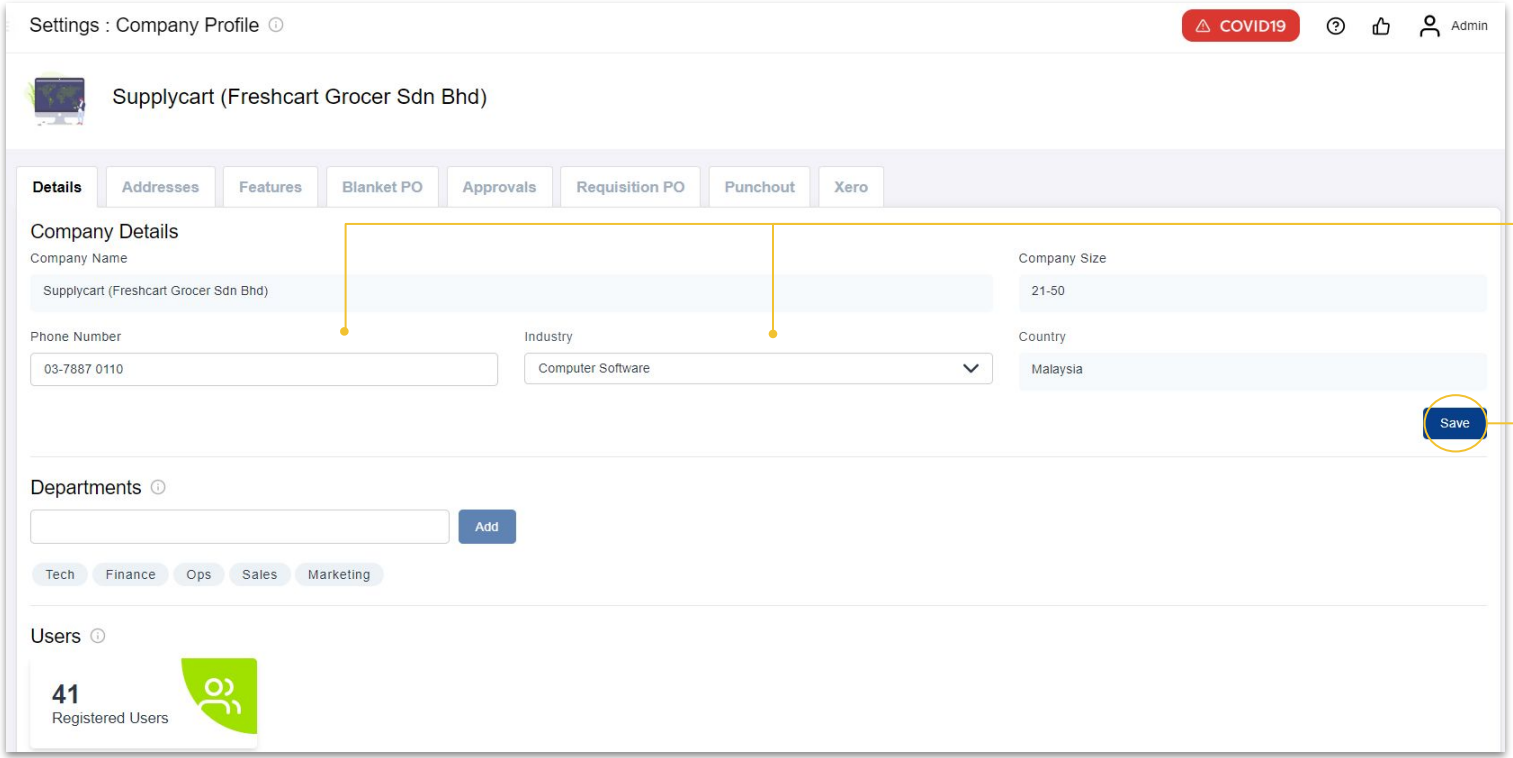
Settings - Company Profile : Update Company Details



Update your company's **Phone Number** and **Industry**

Click on **Save** to ensure changes made are updated

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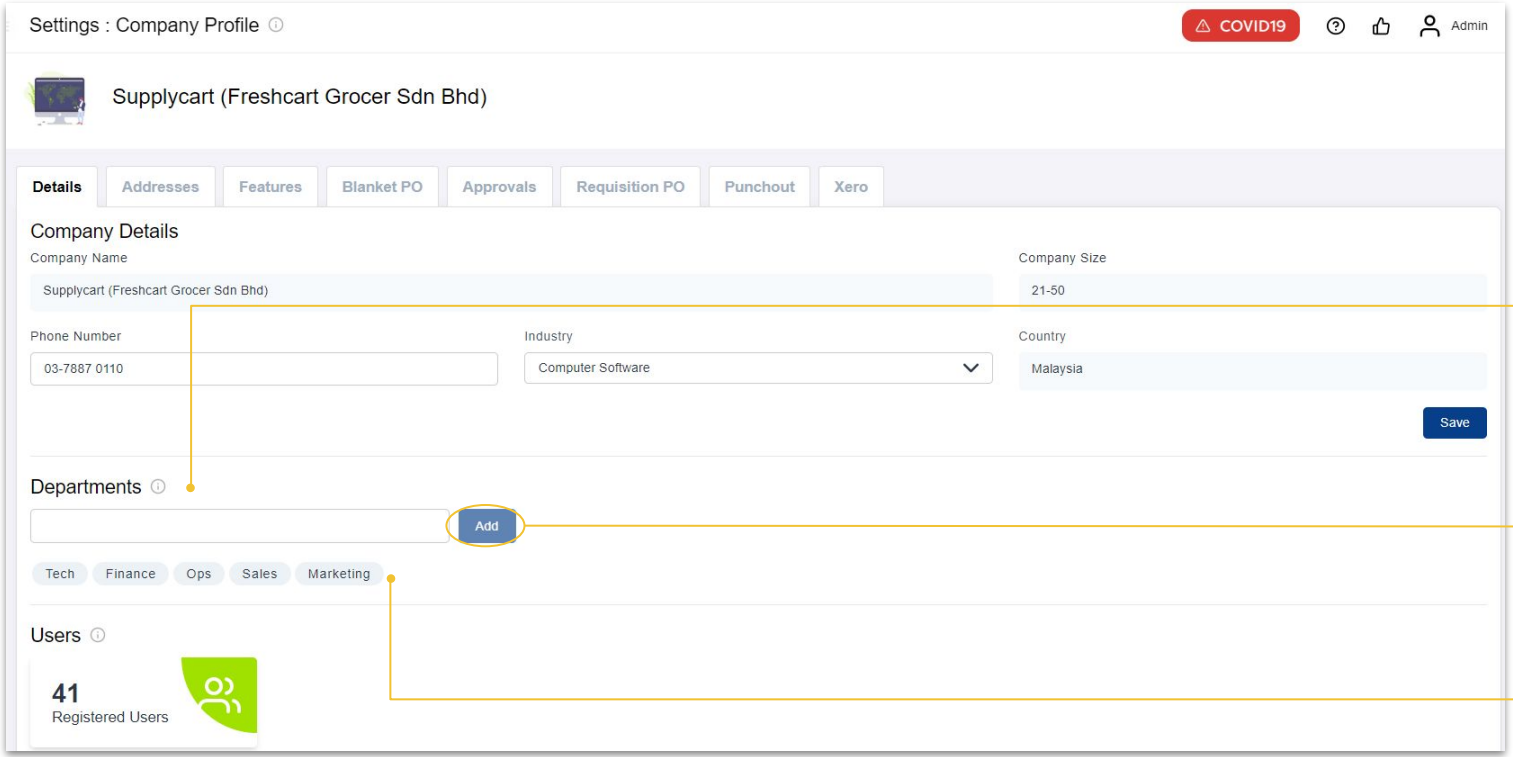
Settings - Company Profile : Adding Departments



Key in department name to add departments

Click on **Add** to save departments

The added departments will be reflected here

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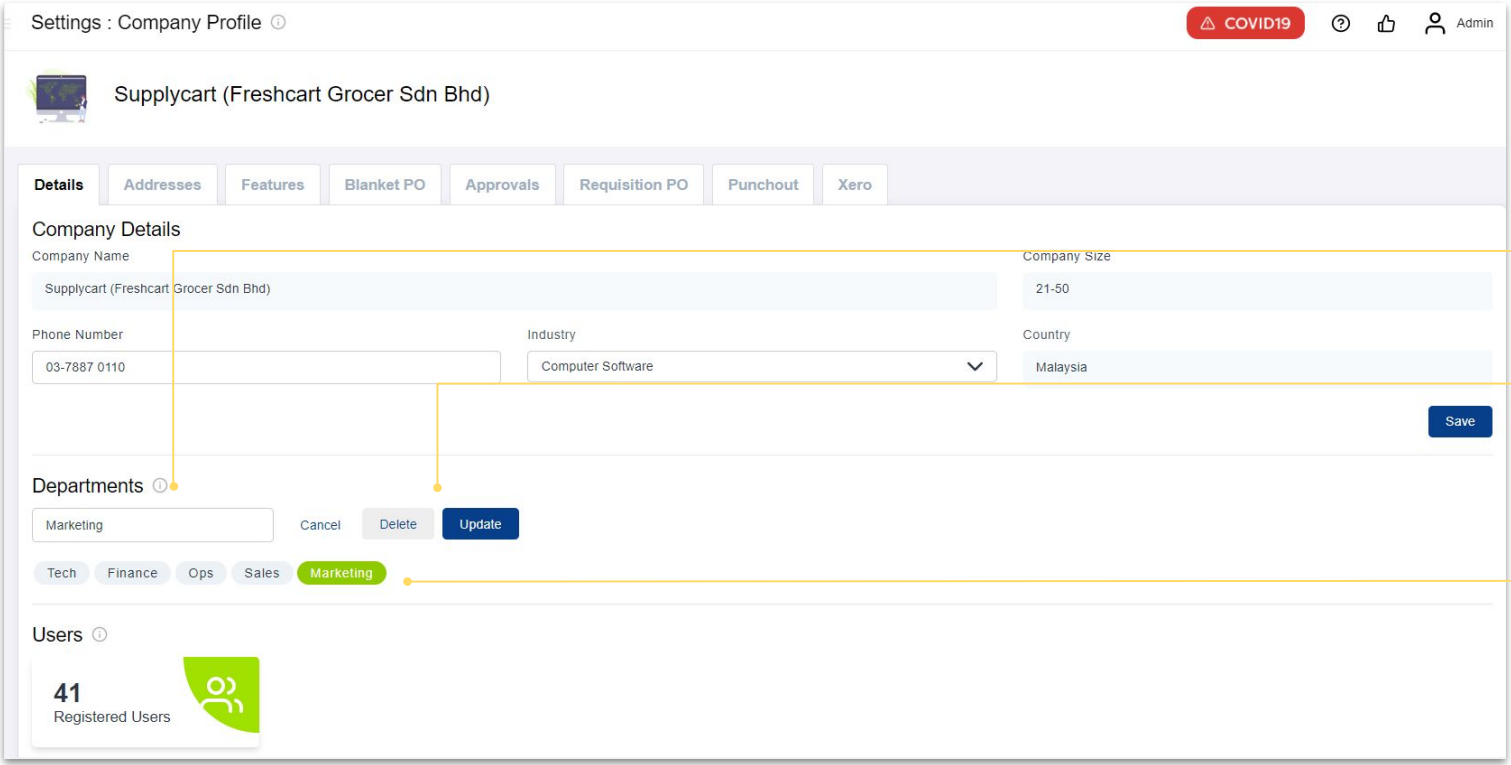
Settings - Company Profile : Maintaining Departments



Amend the selected department name

Save any amendments by clicking **Update** or **Delete** the department

Click to select the department to be maintained

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ADAM - Company Profile : Addresses

Side-menu:

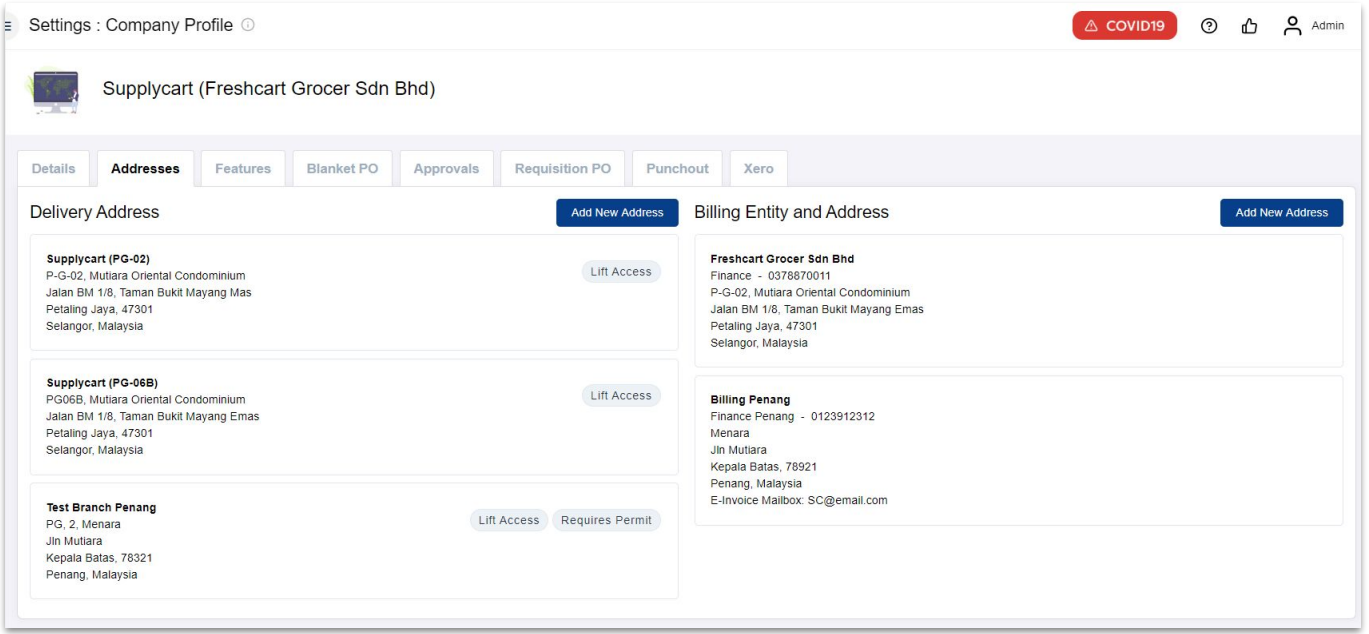
Settings > Company Profile > Addresses

Page purpose:

Add, delete, and update billing and delivery addresses

Features:

1. Add address
2. Update address
3. Delete address



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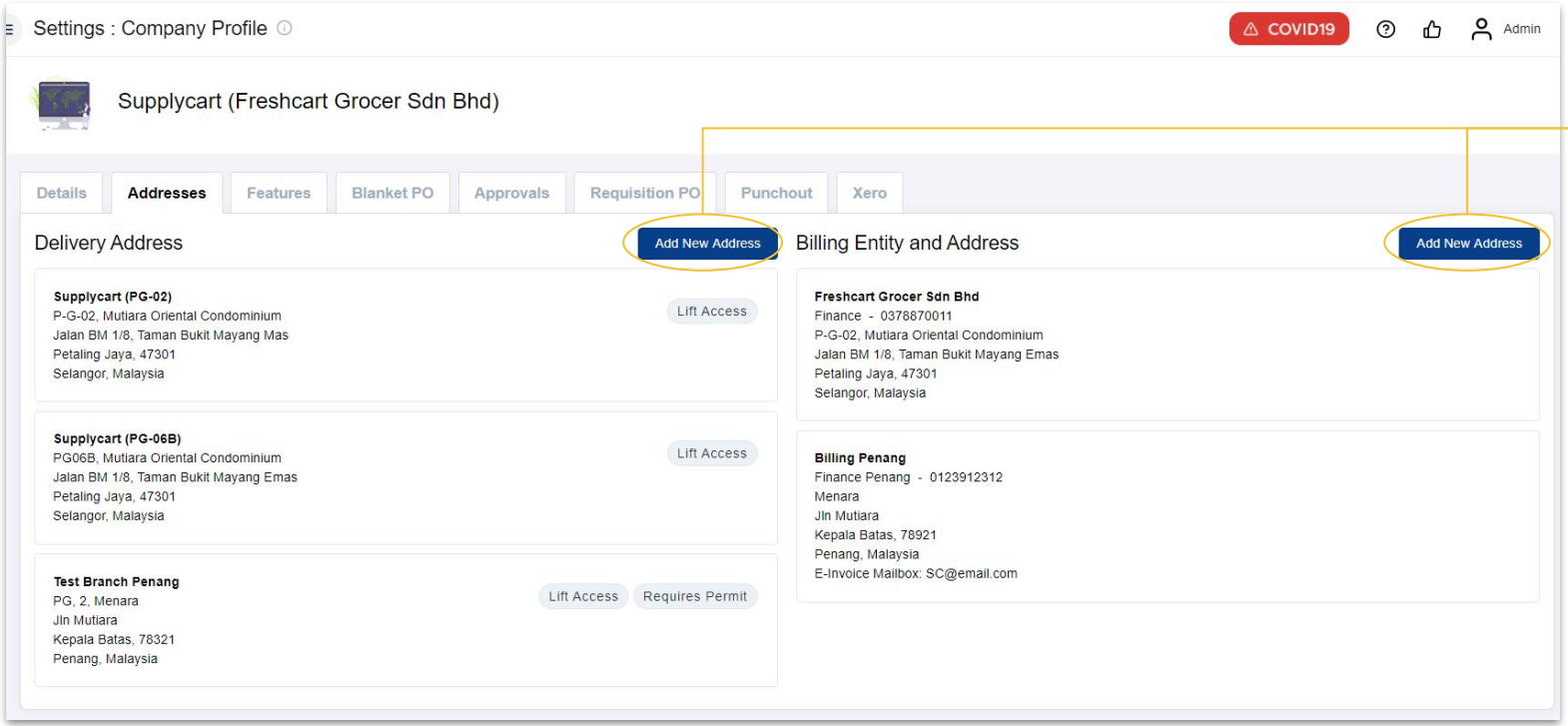
Settings - Company Profile : Adding Addresses



Click on **Add New Address** to add a new delivery or billing address

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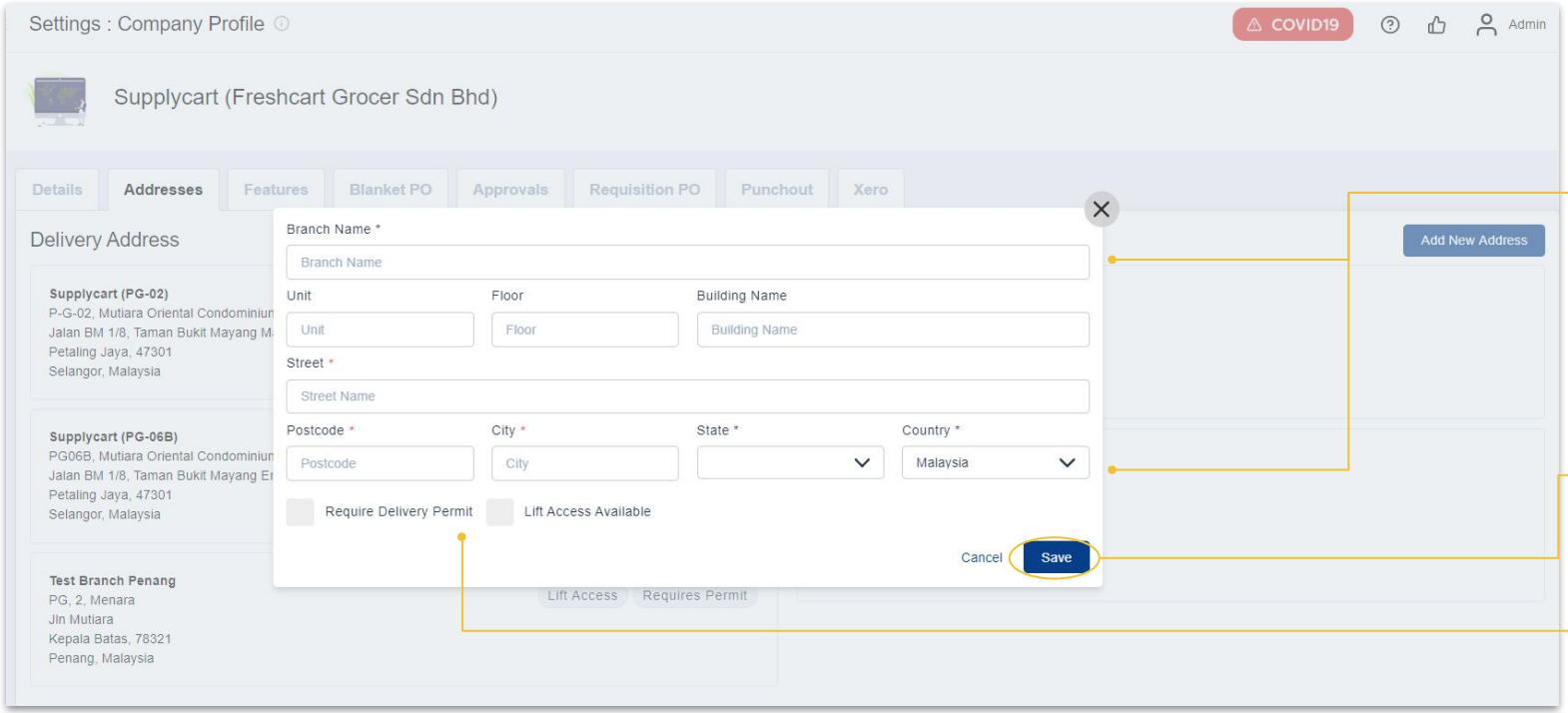
Settings - Company Profile : Adding Delivery Address



Key in relevant delivery details

Click **Save** to add a new address

Tick the boxes if the delivery location **Requires** a **Delivery Permit** or has **Lift Access**

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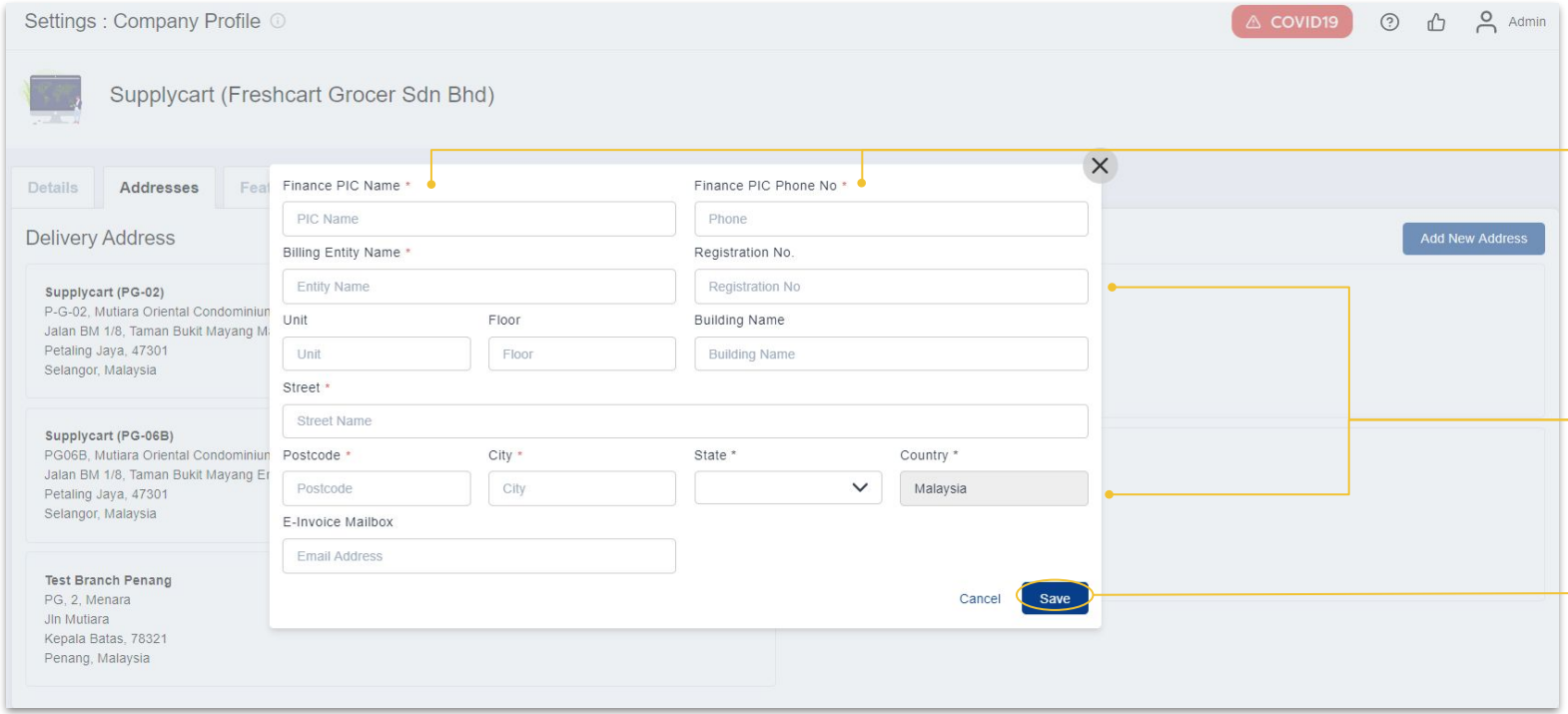
Settings - Company Profile : Adding Billing Address



Key in Finance PIC's **Name** and **Phone Number**

*Finance PIC inputted should be the person in charge of handling the billing of orders

Key in relevant billing details

Click on **Save** to add a new address

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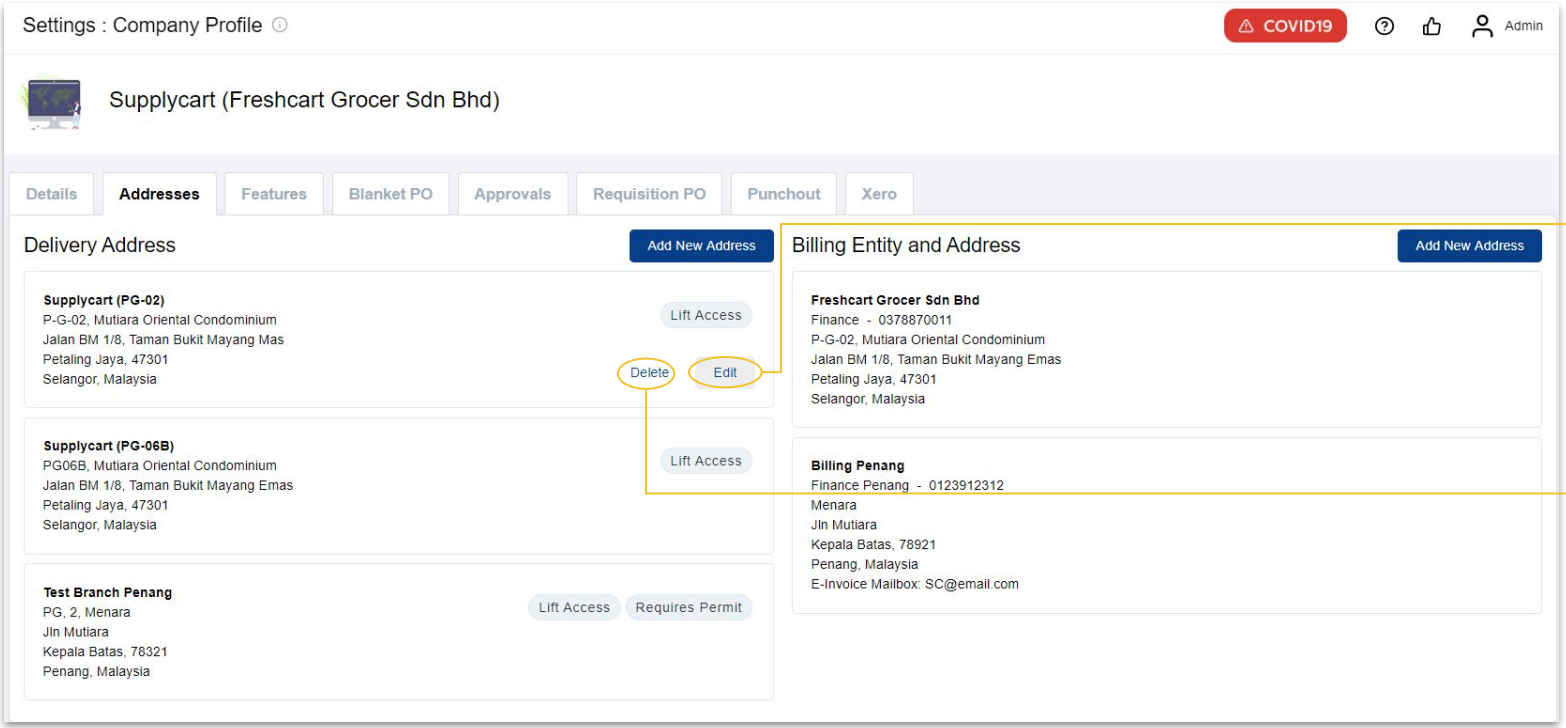
Settings - Company Profile : Maintaining & Deleting Addresses



Click on **Edit** to edit the address

Click on **Delete** to delete the address

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ADAM - Company Profile : Features

Side-menu:

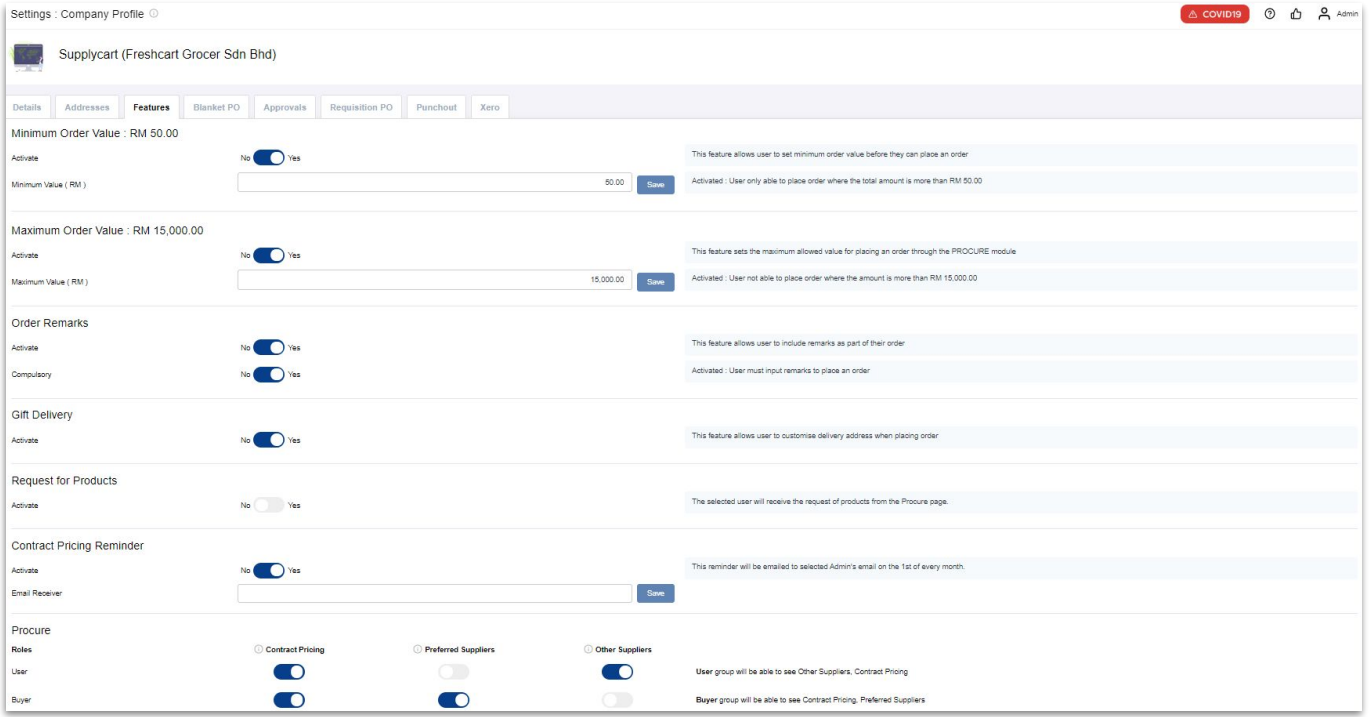
Settings > Company Profile > Features

Page purpose:

Activate or deactivate User Features in ADAM

Features:

1. Activate and set a Minimum & Maximum Order Value
2. Activate order remarks
3. Activate gift delivery
4. Activate Request for Products
5. Activate Contract Pricing Reminder
6. Control view of supplier prices



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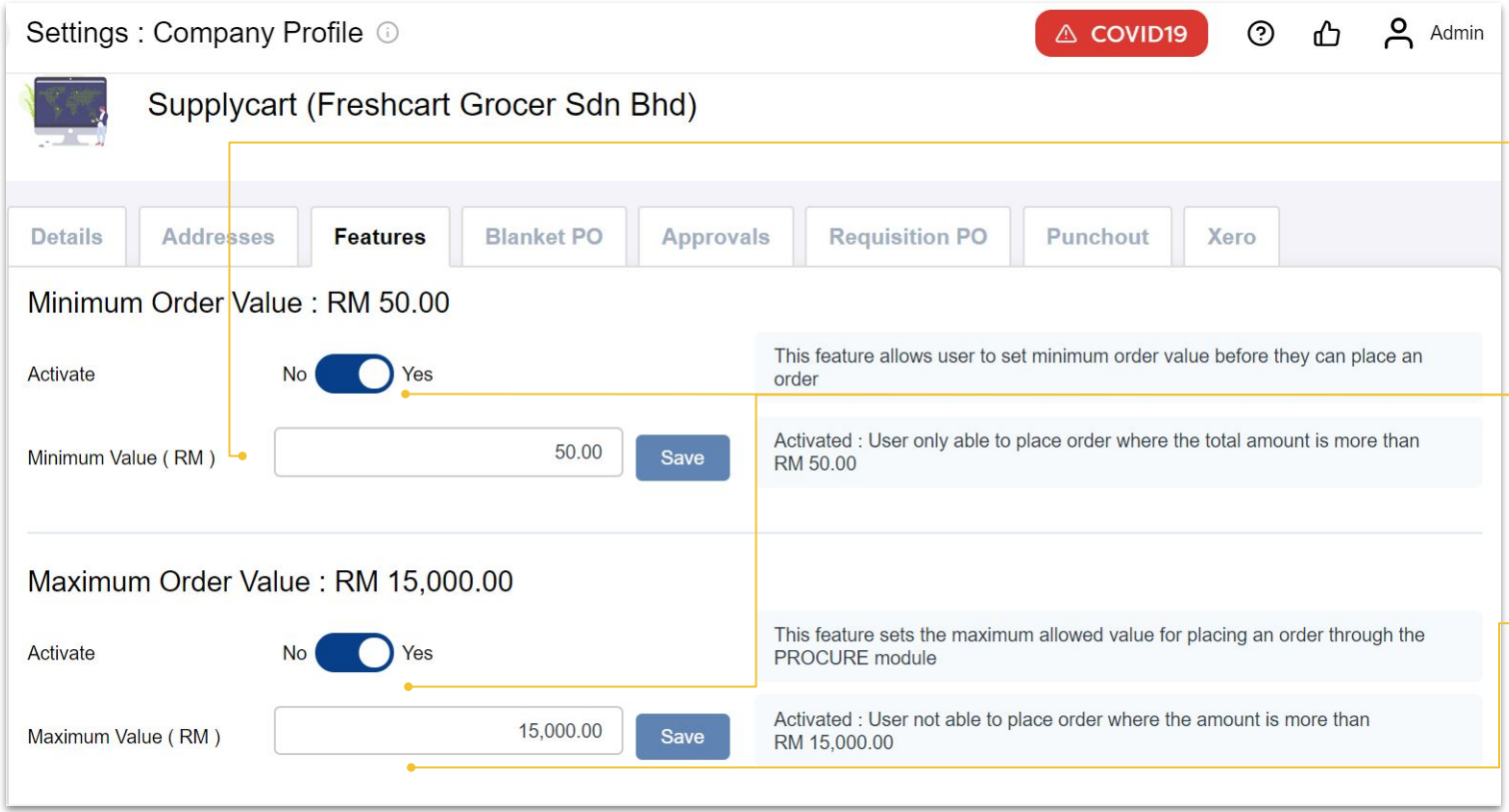
Settings - Company Profile : Features



Set **Minimum Order Value** before users can place an order.

When **Activated,** users can only place orders when the total amount is more than amount set

Use the toggle to **Activate** or **Deactivate** the relevant feature

Set **Maximum Order Value** before users can place an order.

When **Activated,** users cannot place an order when the total amount is more than the amount set

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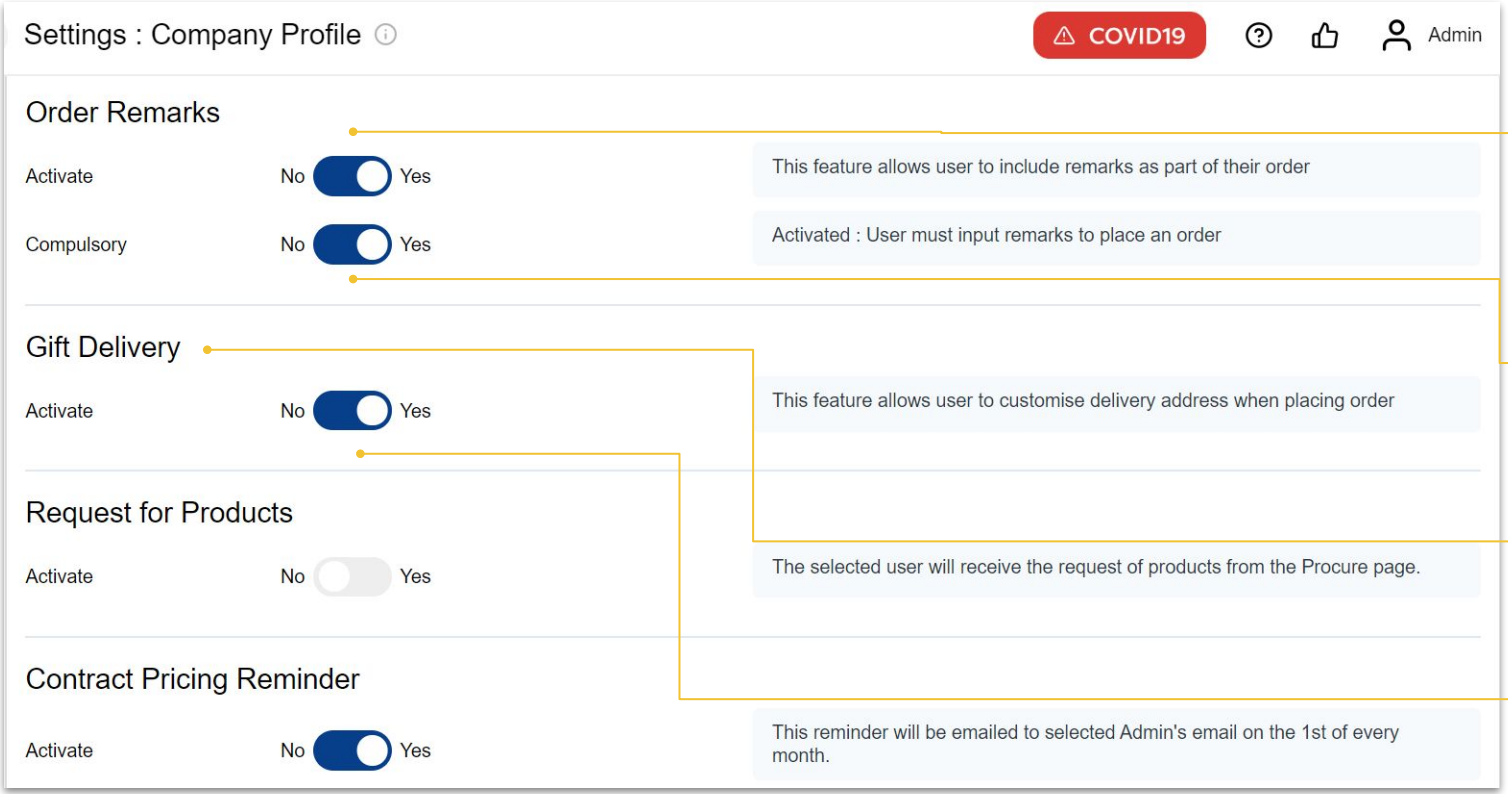
Settings - Company Profile : Features



Toggle to **Activate/Deactivate** order remarks

When Activated, users are able to input remarks when placing orders

Toggle to **Activate/Deactivate Compulsory** order remarks when placing orders

Gift Delivery allows users to customise delivery address when placing an order

Use toggle to **Activate/Deactivate** gift delivery

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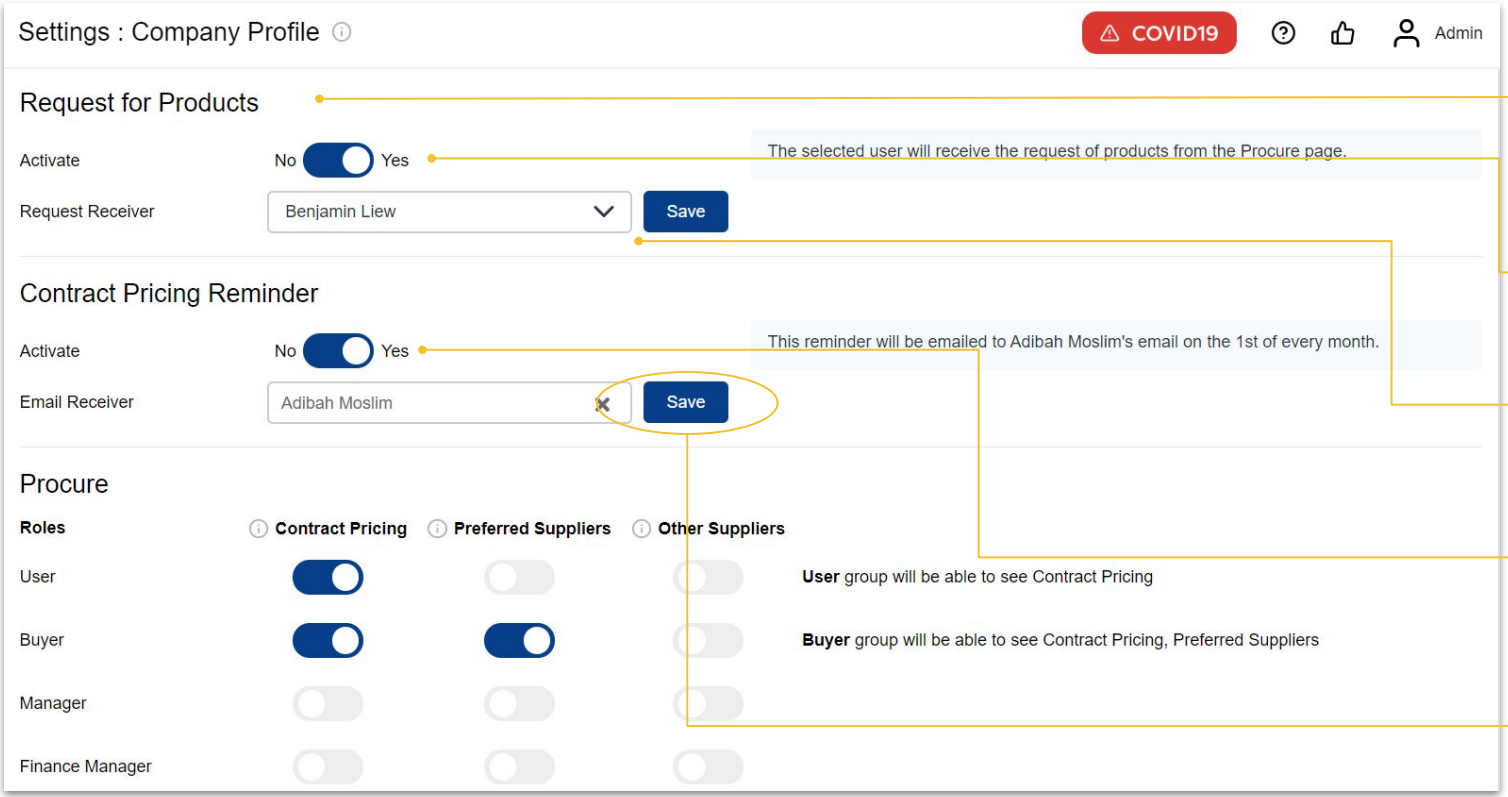
Settings - Company Profile : Features



The **Request for Products** feature allows the selected user to receive request of products from Procure page

Use toggle to **Activate/Deactivate** request for products

Choose selected **Request Receiver** and click on **Save**

When **Activated,** the selected Admin will be notified if there are contract prices that are expiring

Key in selected Admin's **Email Address** and click on **Save**

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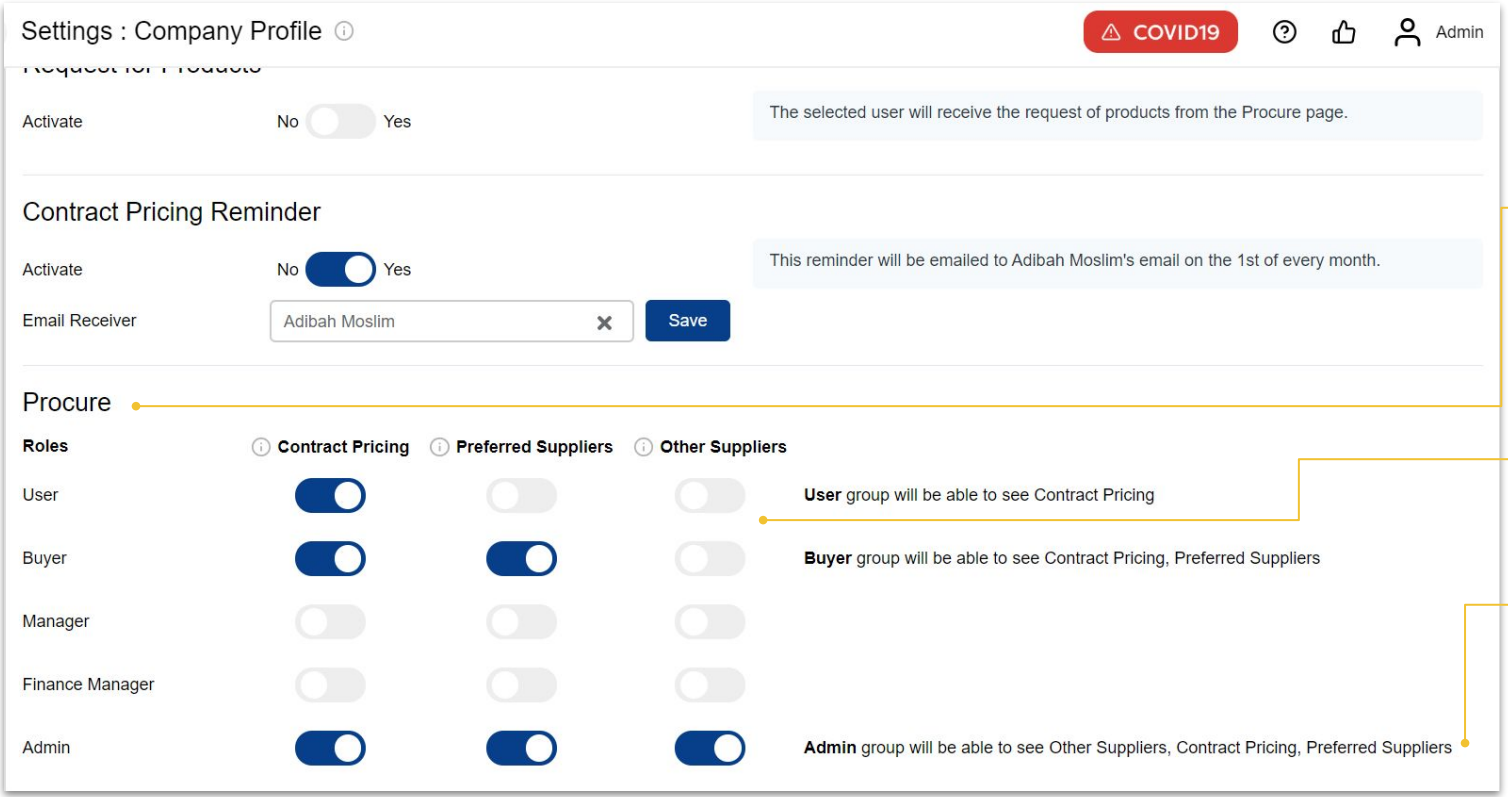
Settings - Company Profile : Features



This feature controls which supplier prices can be seen by each user type at the **Procure** page

Toggle to enable what prices each user group can/cannot see

This shows what each user group can see at the Procure page

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ADAM - Company Profile : Blanket PO

Side-menu:

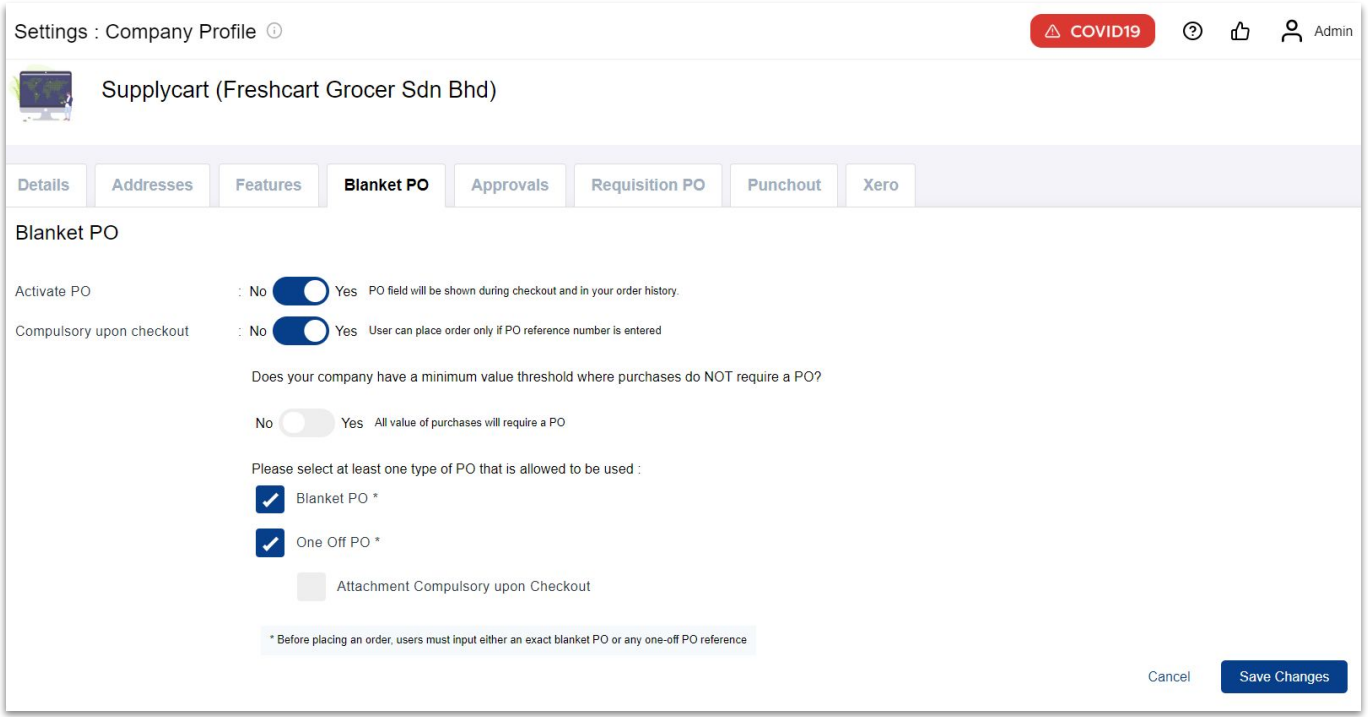
Settings > Company Profile > Blanket PO

Page purpose:

Set up PO settings according to your company policy

Features:

1. Enable PO controls



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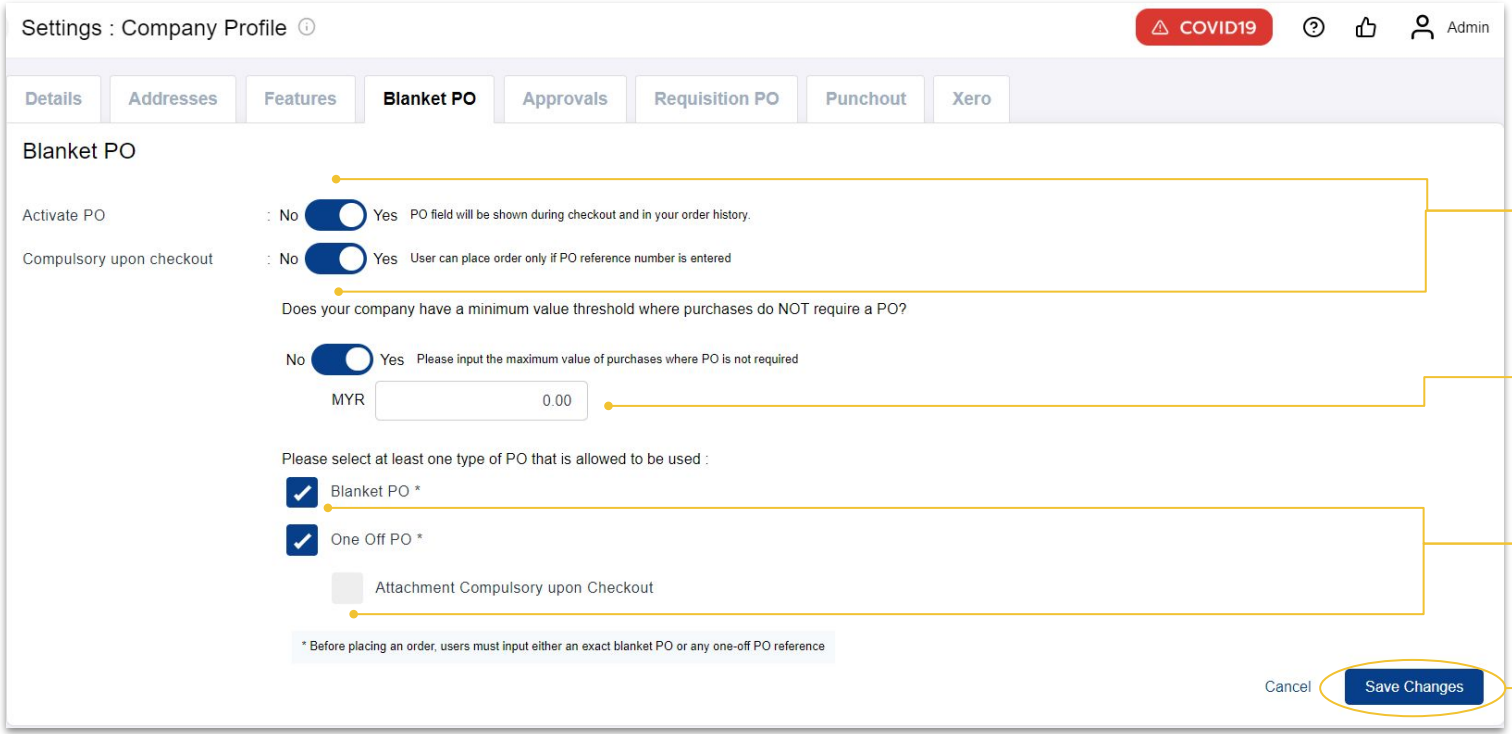
Settings - Company Profile : Blanket PO



Toggle switches to set up the PO usage according to your company's policy

Input the **maximum value** of purchases where PO is not required

Tick or un-tick to specify the types of POs that can be accepted on ADAM

Click to **Save Changes**

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ADAM - Company Profile : Approvals

Side-menu:

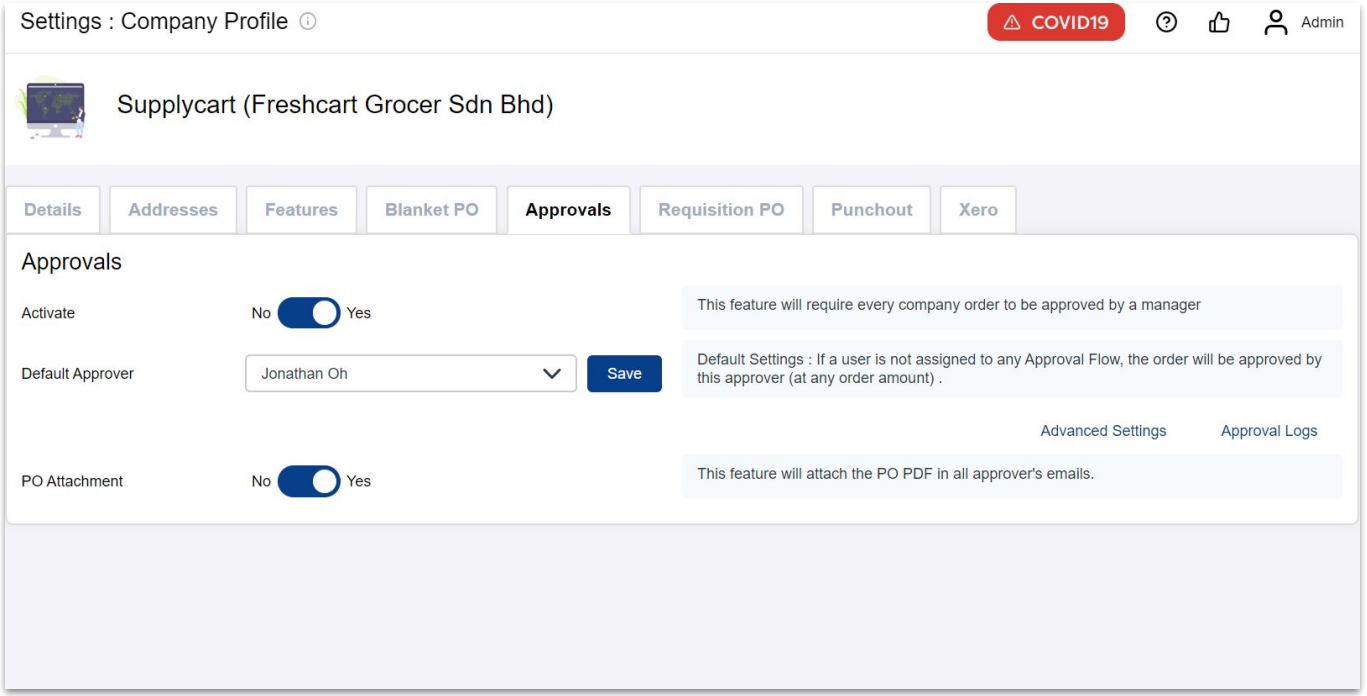
Settings > Company Profile > Approvals

Page purpose:

Set up your company's approval policy

Features:

1. Multi-tiers approval setup
2. Multiple approval flows



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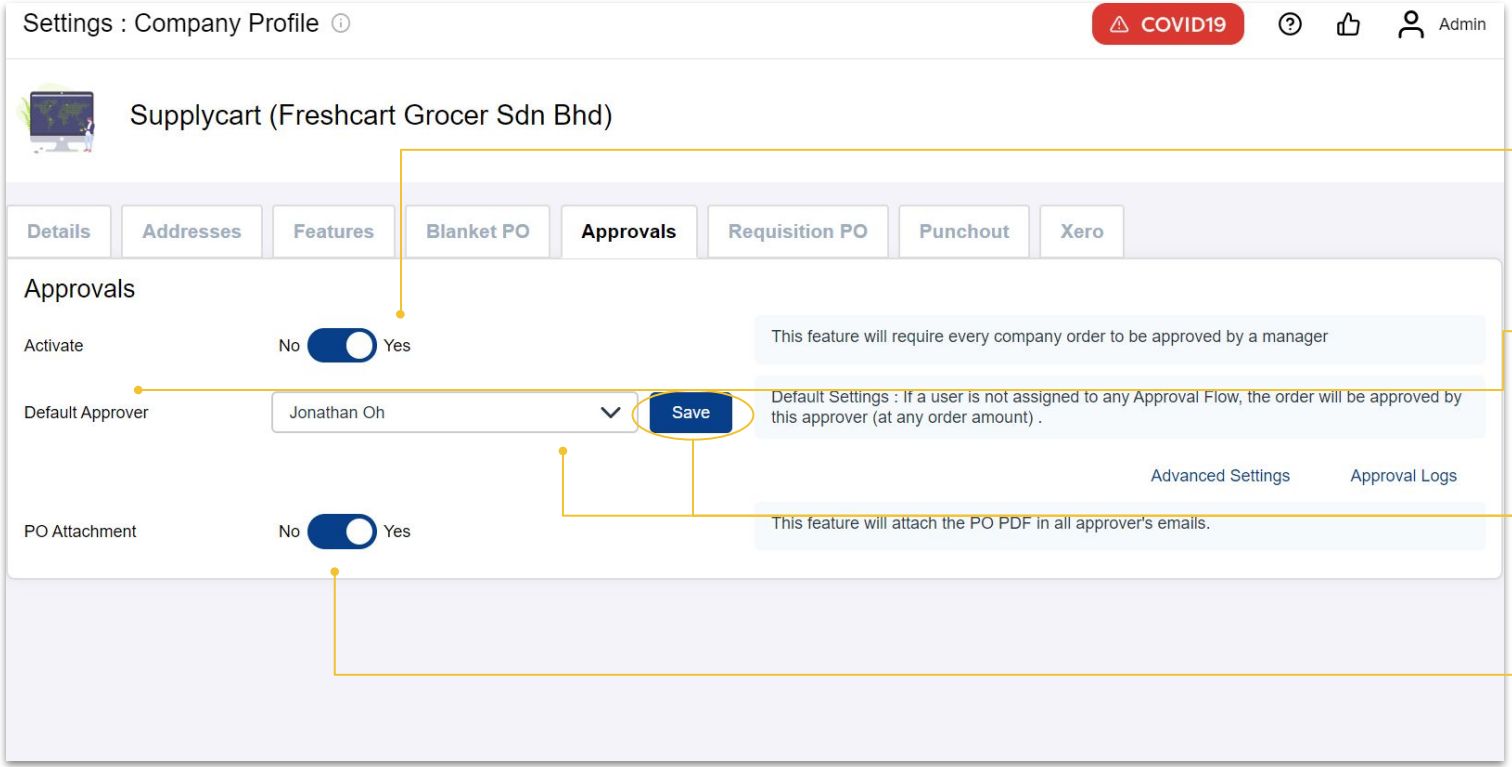
Settings - Company Profile : Approvals



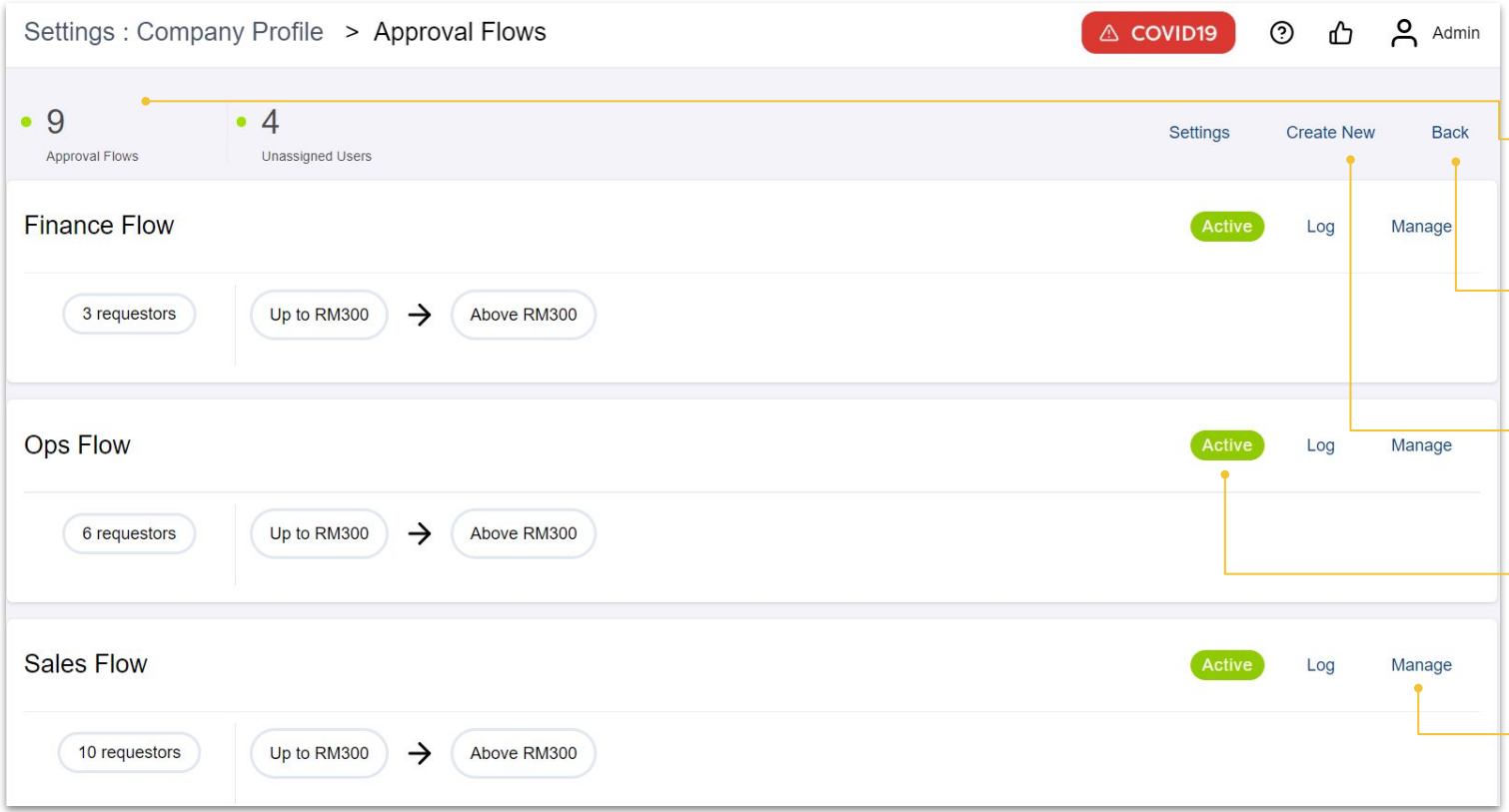
Use the toggle to **activate/deactivate** approvals for every company order

The **Default Approver** will approve orders for users that are not assigned to any **Approval Flow**

Select a **Default Approver** and click on **Save**

Toggle to **Activate PO Attachment** to attach the PO PDF in all approver's emails

Company Profile - Approvals : Approval Flows



Click to see all users that are not assigned to an approval flow

Click on **Back** to return to main features page

Create a new approval flow

This shows if the approval flow is currently **Active**

Click on **Manage** to set step details

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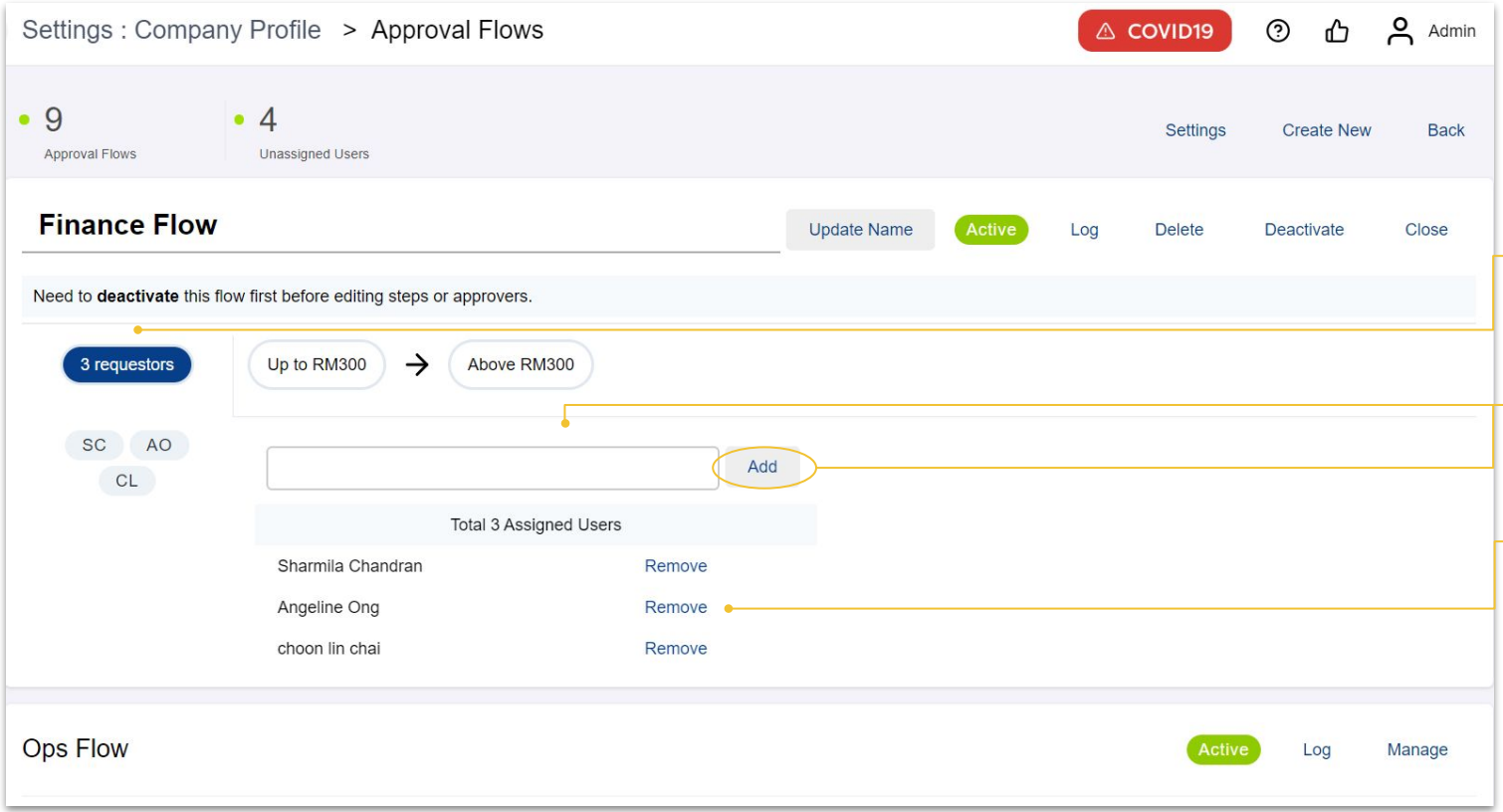
Company Profile - Approvals : Approval Flows



Click on **Requestors** to see the list and add on users

Add users by entering user's name and click **Add**

Remove existing users

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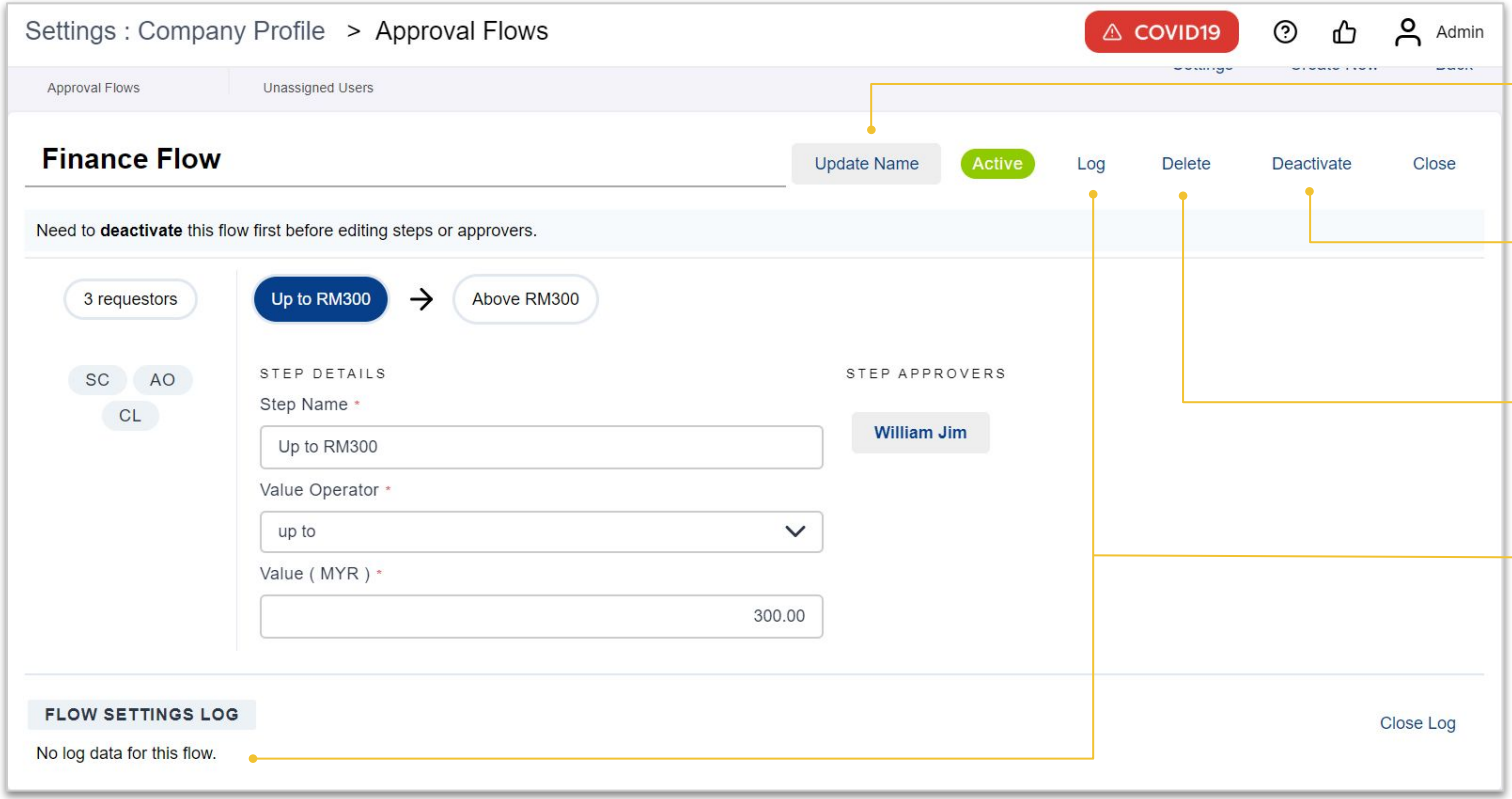
Company Profile - Approvals : Approval Flows



Amend the approval flow name and click on **Update Name**

Deactivate the approval flow if not in use or to edit steps or approvers

Delete the chosen approval flow

Flow settings log shows log data for the specific flow

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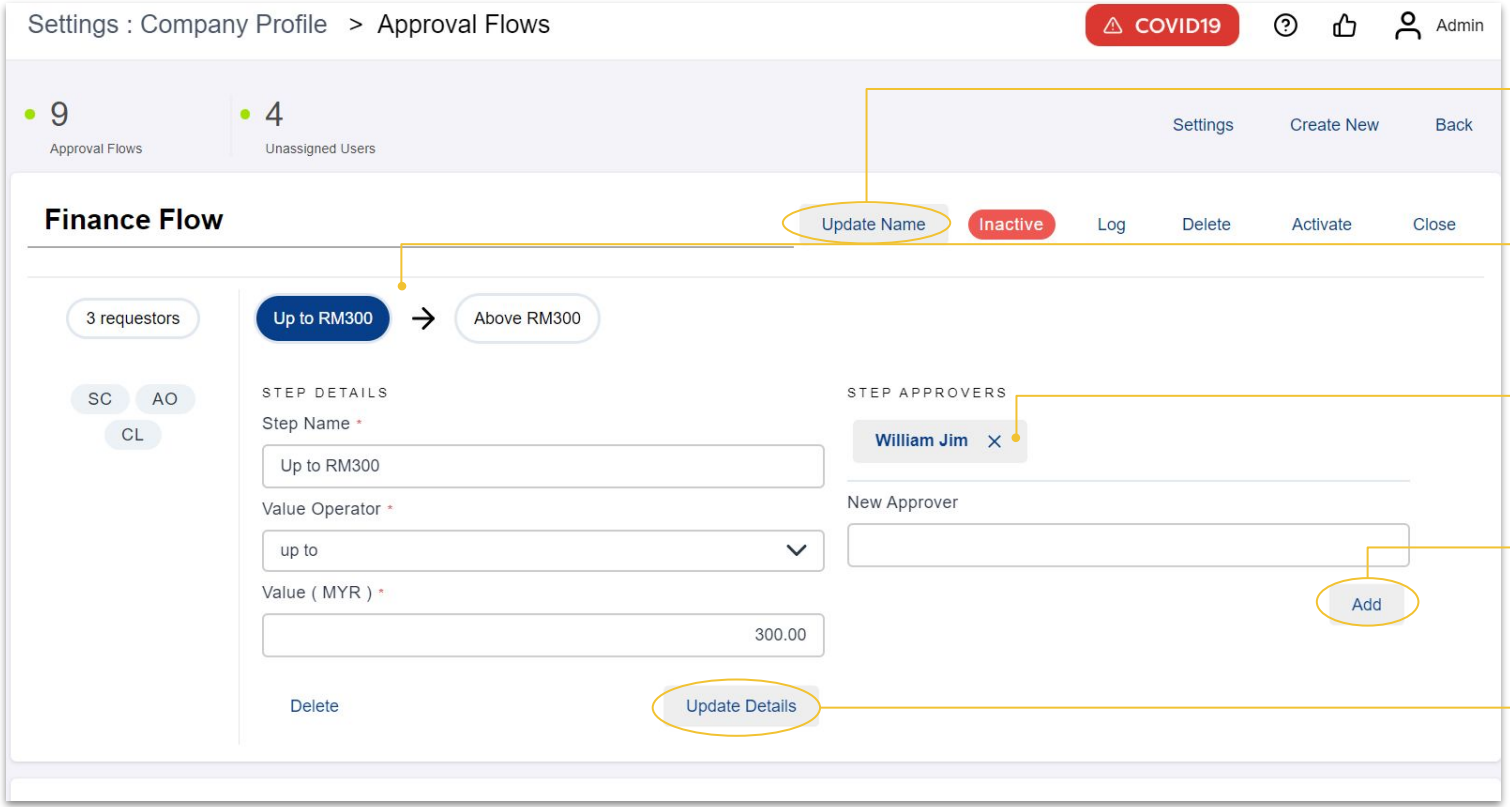
Settings - Company Profile : Approval Flows



Amend the approval flow name and click on **Update Name**

Select the step to update

Step Approvers are shown here.
Click on **'X'** to remove a specific approver

Input a new approver and click on **Add**

Input/Edit the **Name** and **Values** and click on **Update Details**

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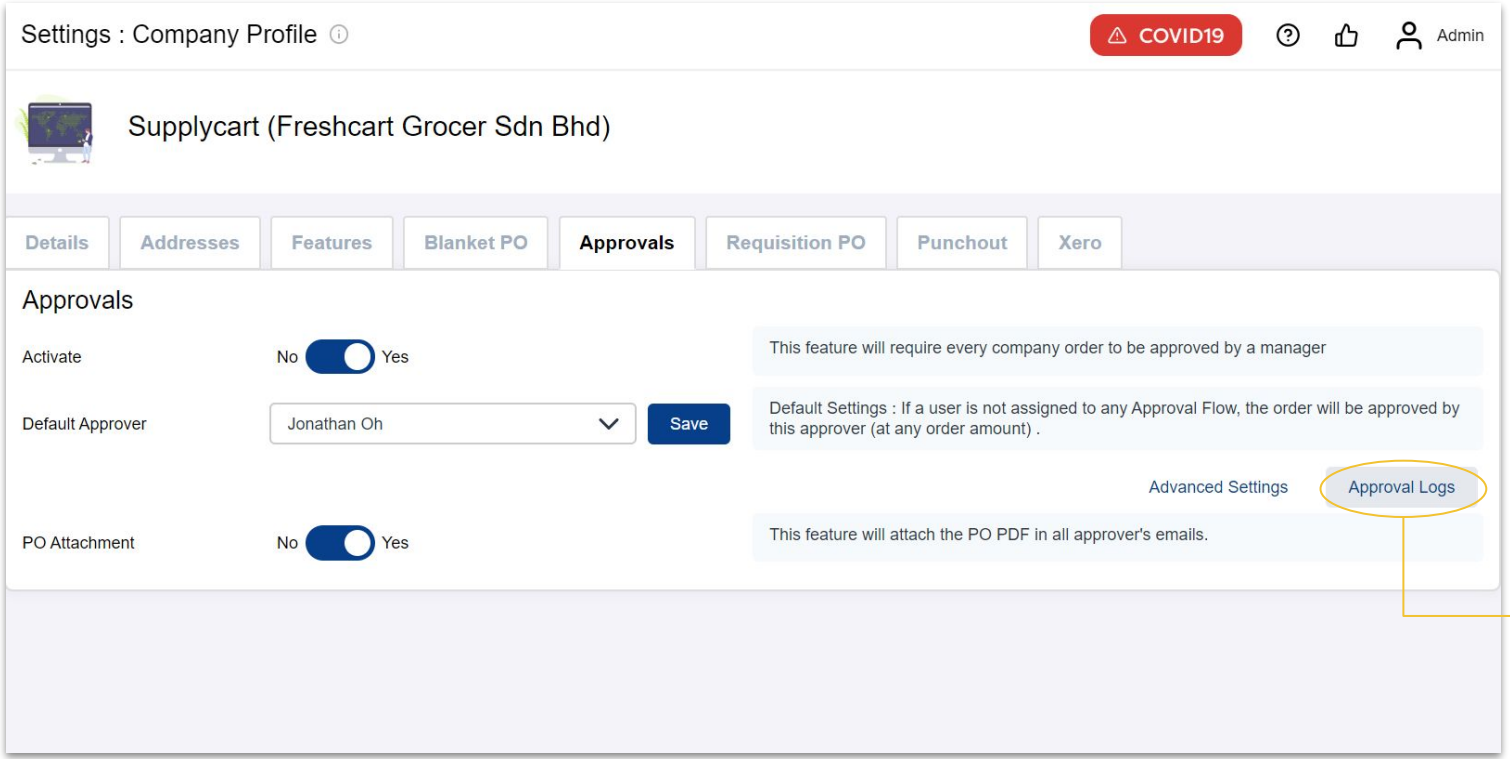
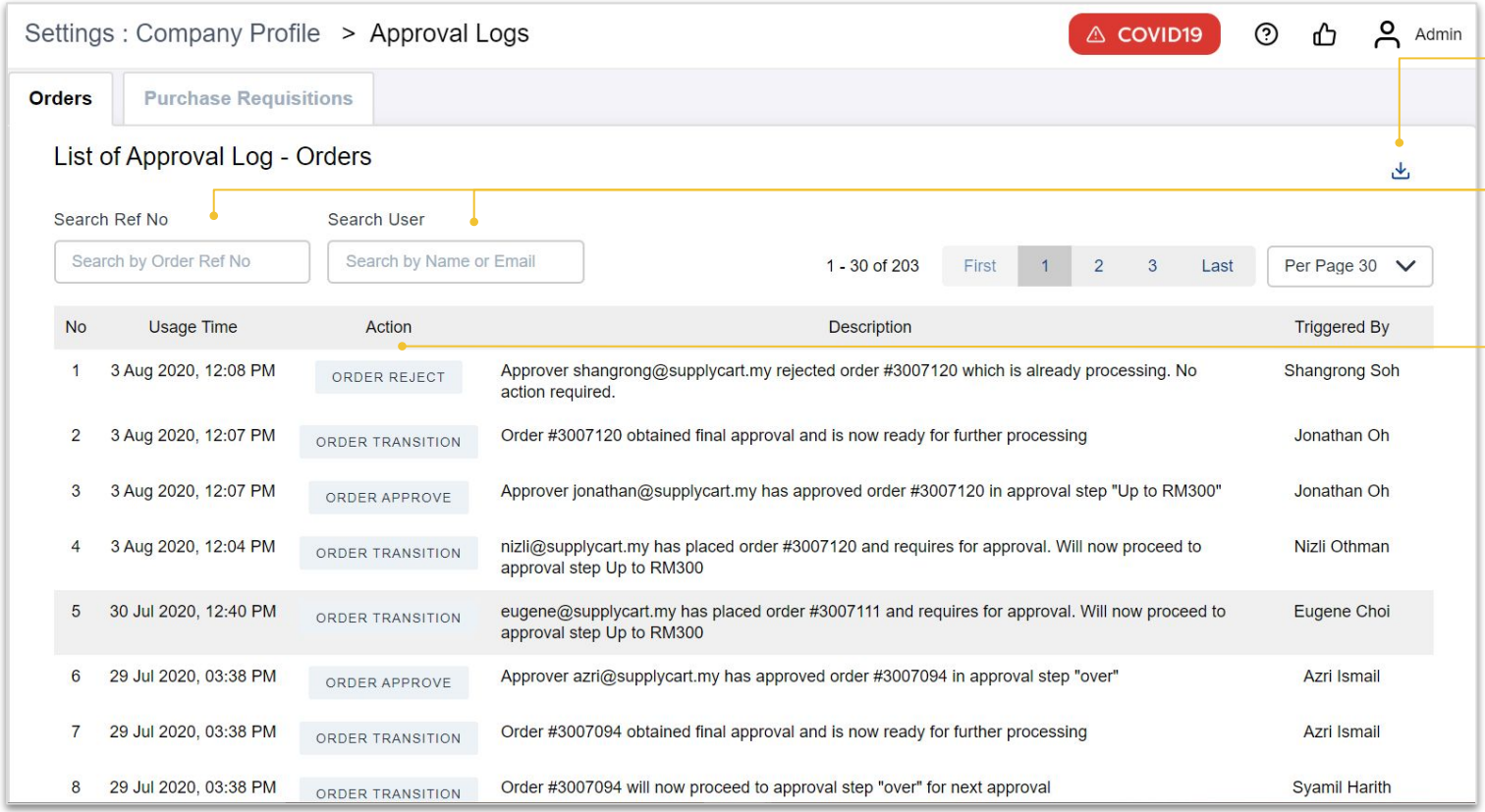
Settings - Company Profile : Approval Logs



Click on **Approval Log** to access the list of Approval Log for:

- **Orders**
- **Purchase Requisitions**

Company Profile - Approvals : Approval Log



Download CSV file of the Approval Log

Search for **Ref No** or **User** using the search bar

Details of each approval

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ADAM - Company Profile : Requisition PO

Side-menu:

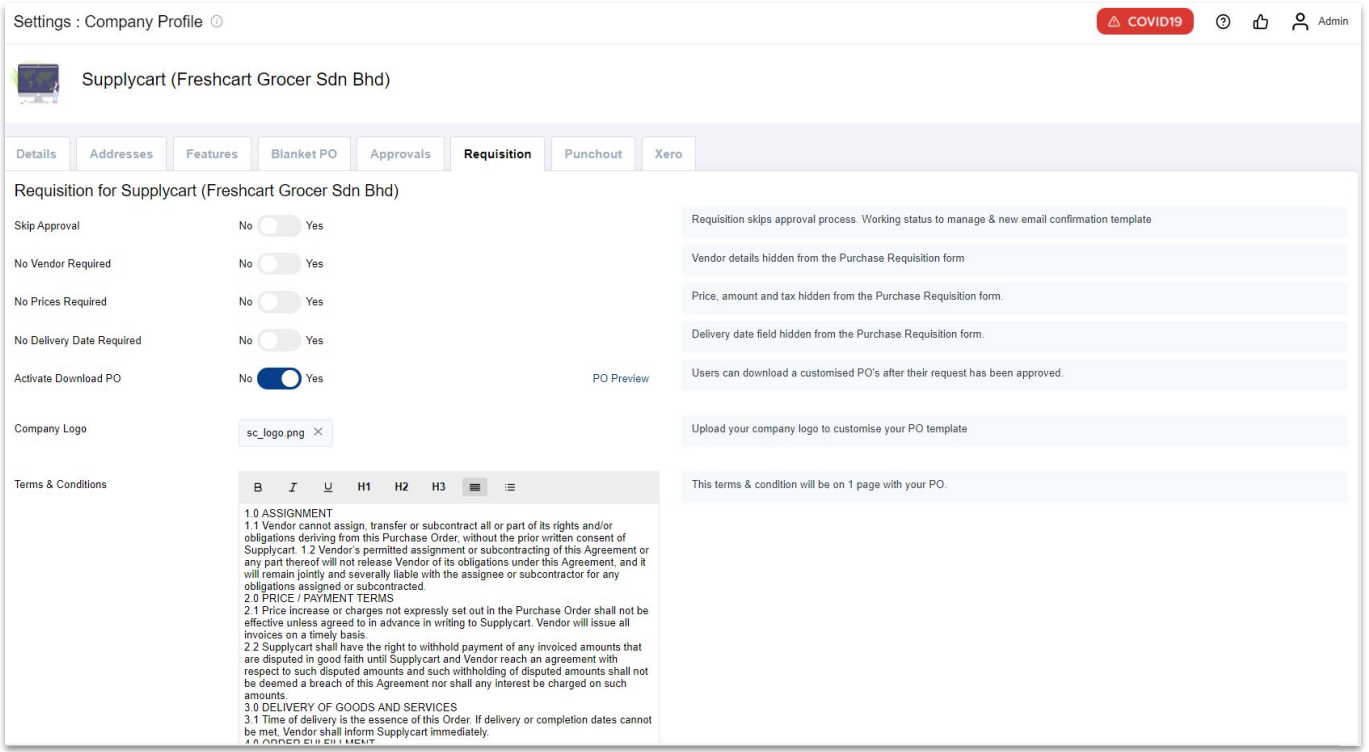
Settings > Company Profile > Requisition PO

Page purpose:

Enable users to generate customised PO when a Purchase Requisition is generated and approved

Features:

1. Activate Requisition PO
2. Customise your company's Requisition PO



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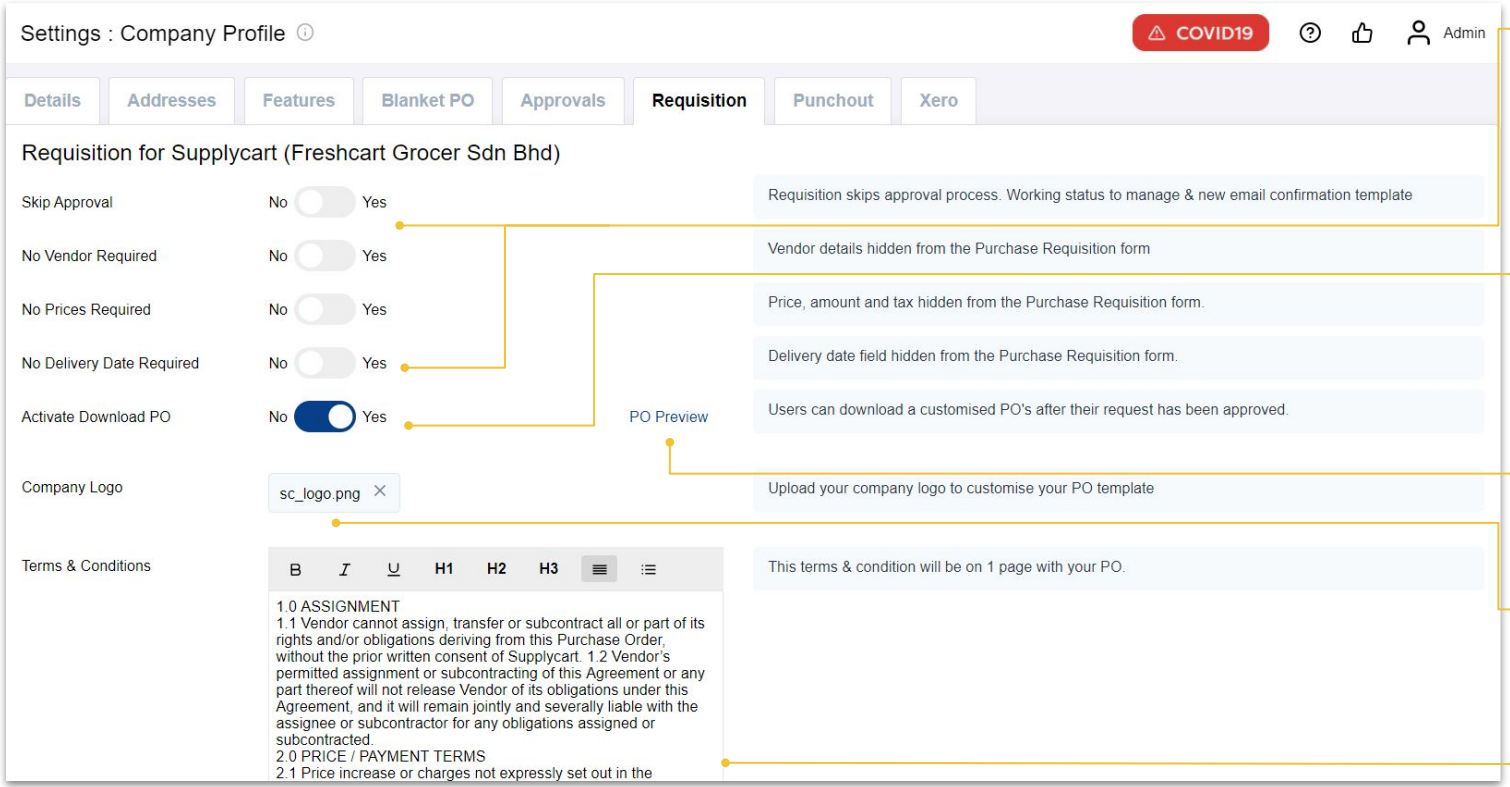
Settings - Company Profile : Requisition PO



Toggle to **Activate/Deactivate** features according to your company's preference

Toggle to **Activate/Deactivate** Requisition PO for users

When activated, users are able to download POs upon approval of request

Click to preview the PO

Insert attachment (**Company's logo**) to customise your PO template

Include your company's **Terms & Conditions** for your PO

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Settings - Company Profile : Requisition PO Features

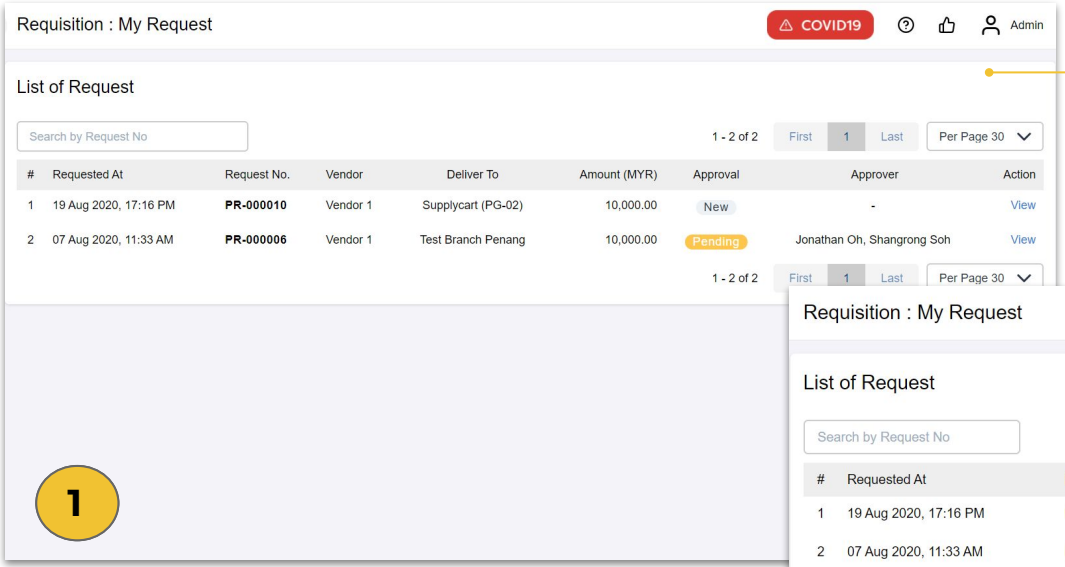
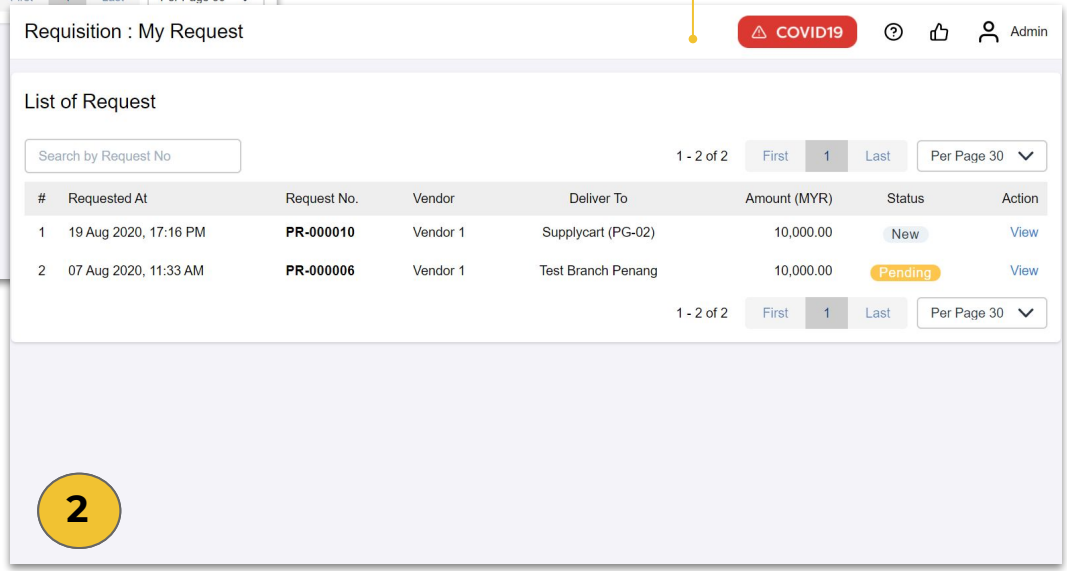


Image 1 shows the Request Form when all requisition features are **disabled**

Image 2 shows an example of the List of Request when the 'Skip Approval' feature is **enabled**

*Approval & Approver is not shown



The 'Skip Approval' feature can be enabled when your company does not require approval for Purchase Requisitions (PR)

Users can immediately submit a PR without needing an approval

Settings - Company Profile : Requisition PO Features

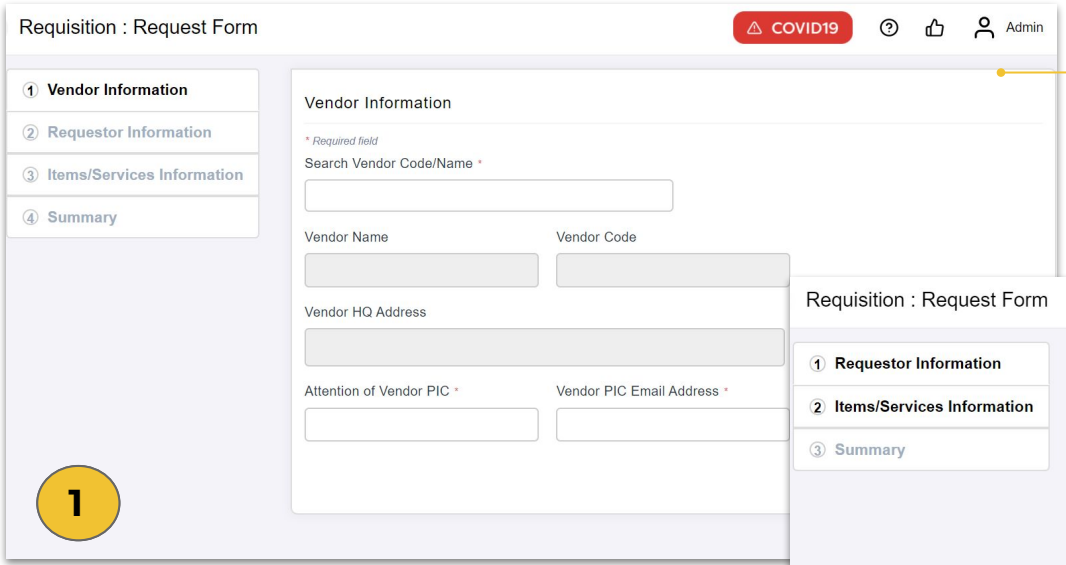
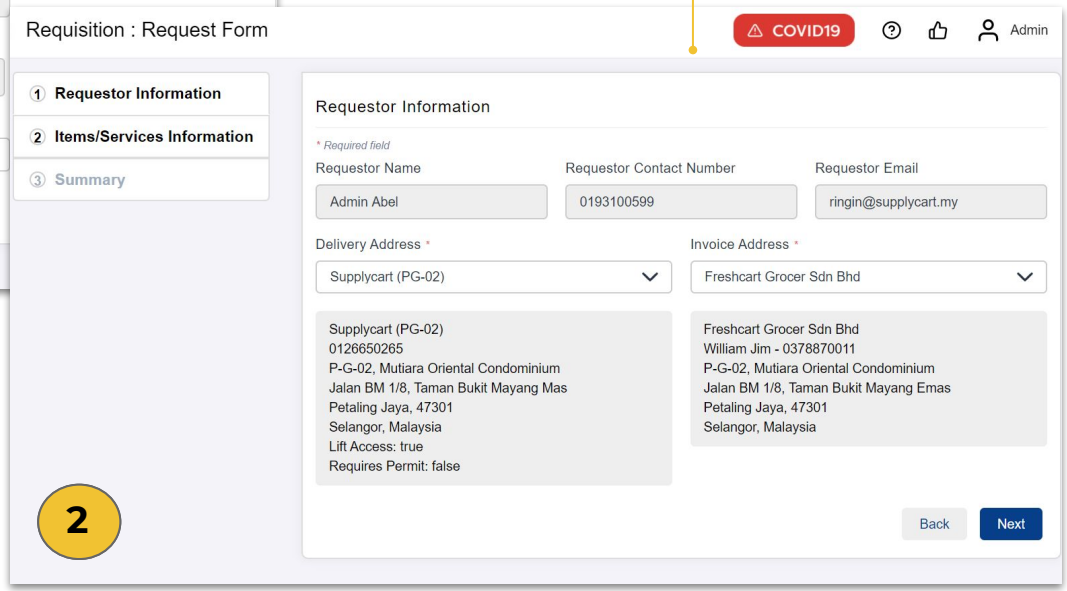


Image 1 shows the Request Form when all requisition features are **disabled**

Image 2 shows an example of the Request Form when the 'No Vendor Required' feature is **enabled**

*Vendor Information tab is not shown



The 'No Vendor Required' feature can be enabled when your company does not require vendor details for a PR

Users can skip the Vendor Information and proceed to the next step

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Settings - Company Profile : Requisition PO Features

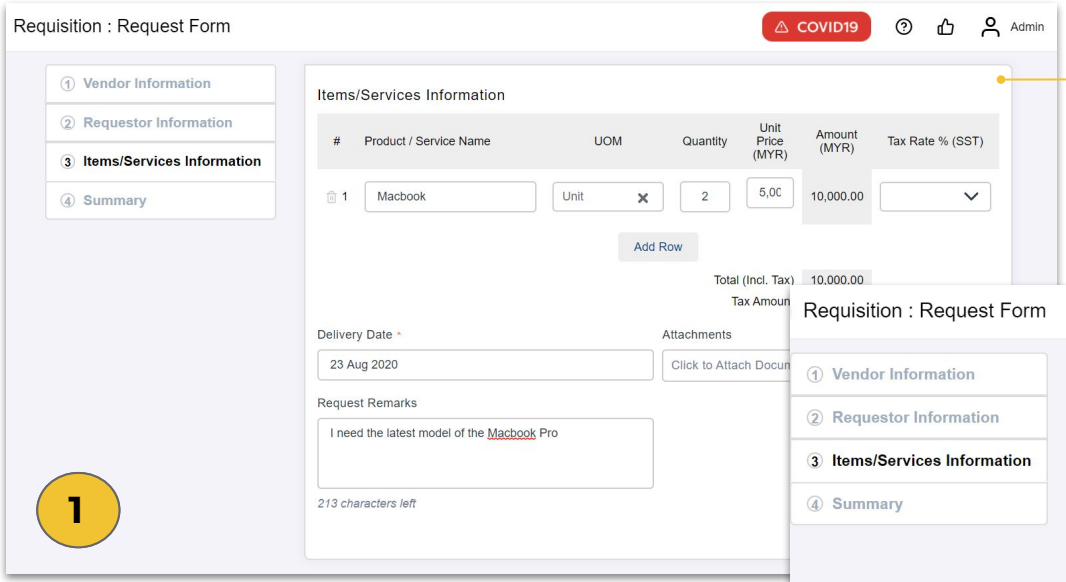
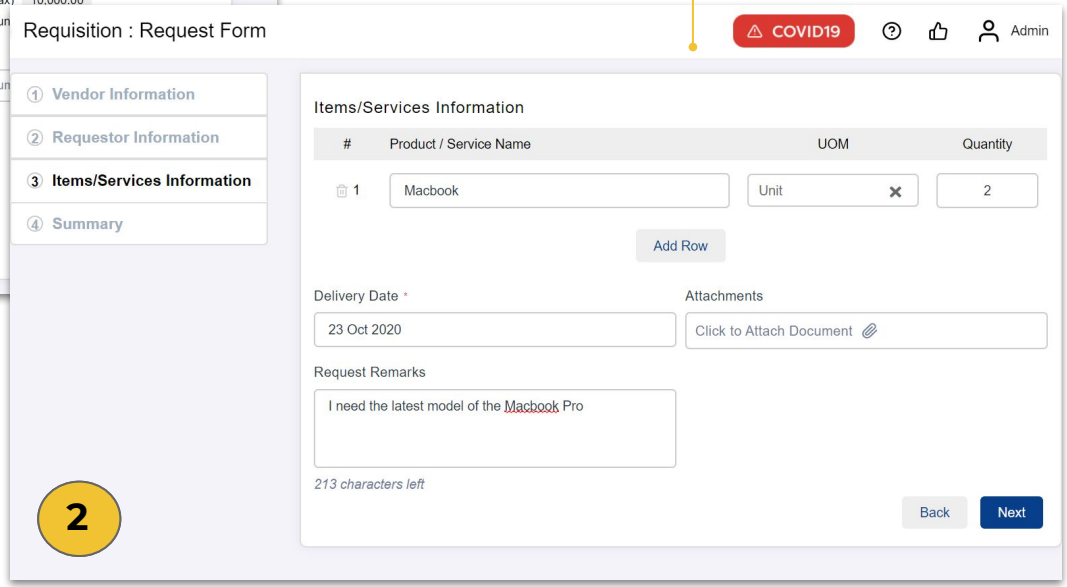


Image 1 shows the Request Form when 'No Prices Required' is **disabled**

Image 2 shows an example of the Request Form when the 'No Prices Required' feature is **enabled**

*Unit Price, Amount & Tax Rate is not shown



The 'No Prices Required' feature can be enabled when your company does not require price details for the PR

When enabled, users do not need to input price information for the PR

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Settings - Company Profile : Requisition PO Features

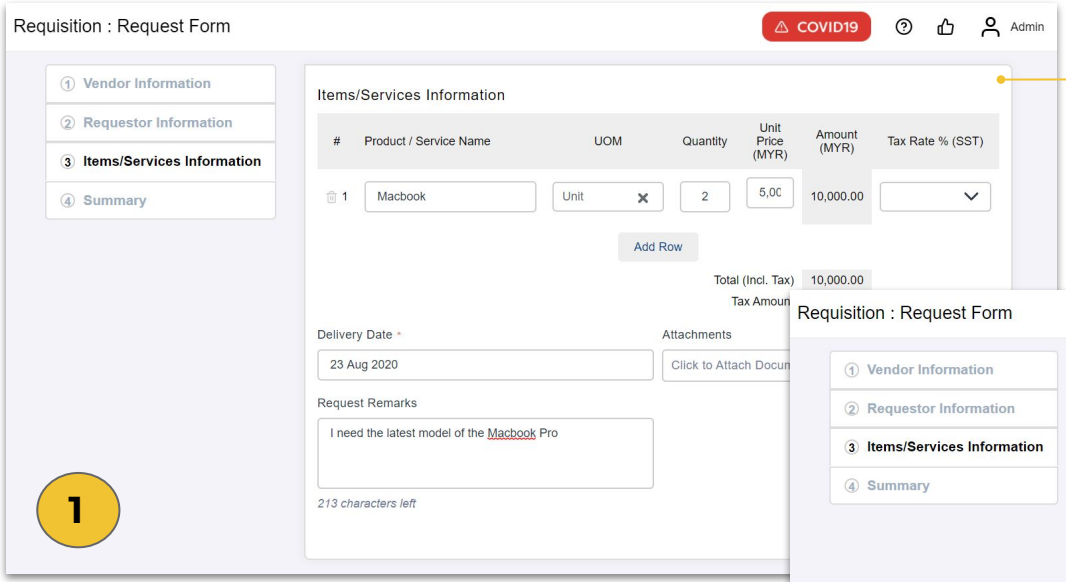
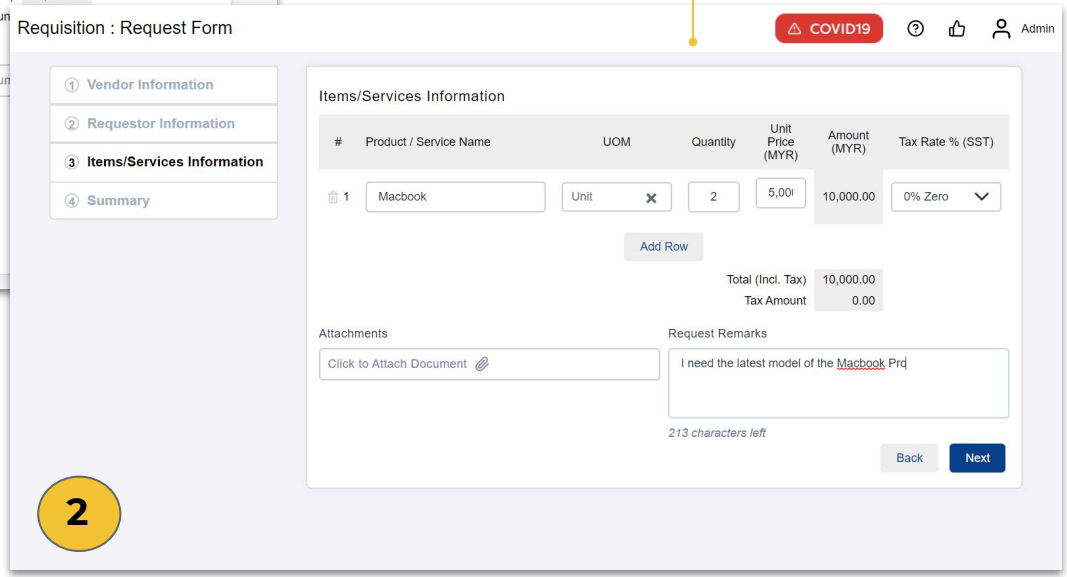


Image 1 shows the Request Form when 'No Delivery Date' is **disabled**

Image 2 shows an example of the Request Form when the 'No Delivery Date' feature is **enabled**

*Option to input Delivery Date is not shown



The 'No Delivery Date Required' feature can be enabled when the Delivery Date is not known

When enabled, users do not need to input the Delivery Date

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User Management

ADAM - Settings : Users

Side-menu:

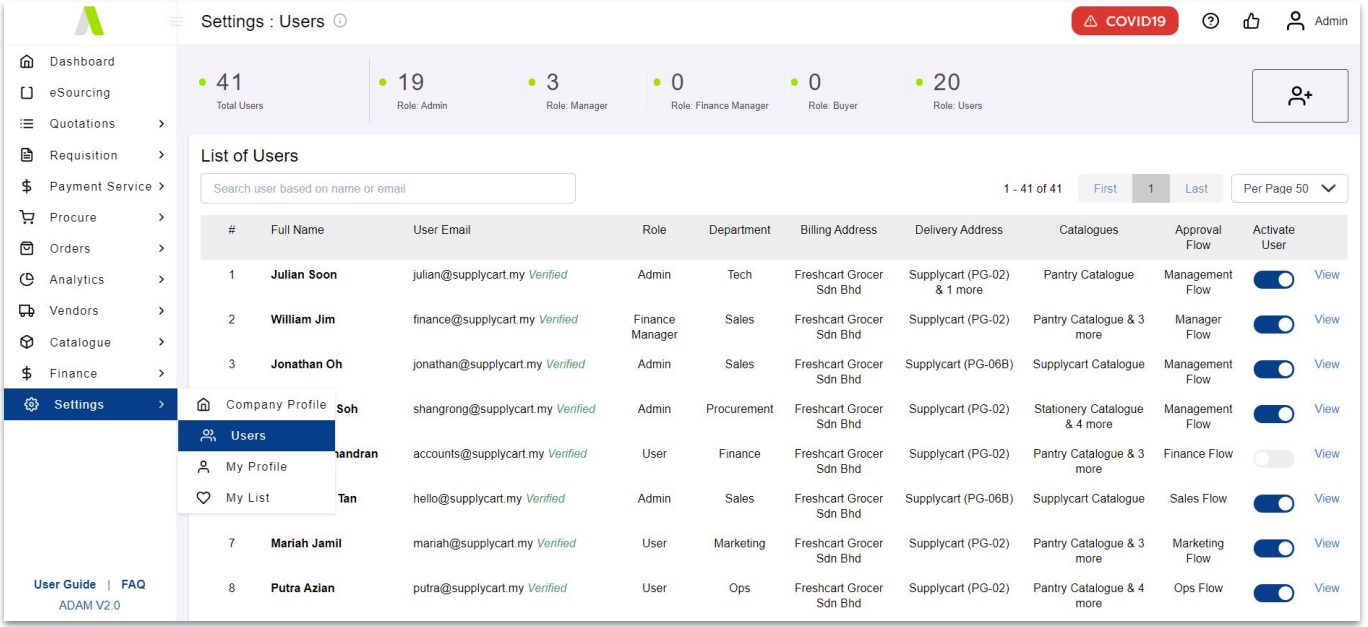
Settings > Users

Page purpose:

Update or maintain any relevant user information

Features:

1. Invite users
2. Assign user roles
3. Activate/deactivate users
4. Assign user catalogues
5. Assign user departments



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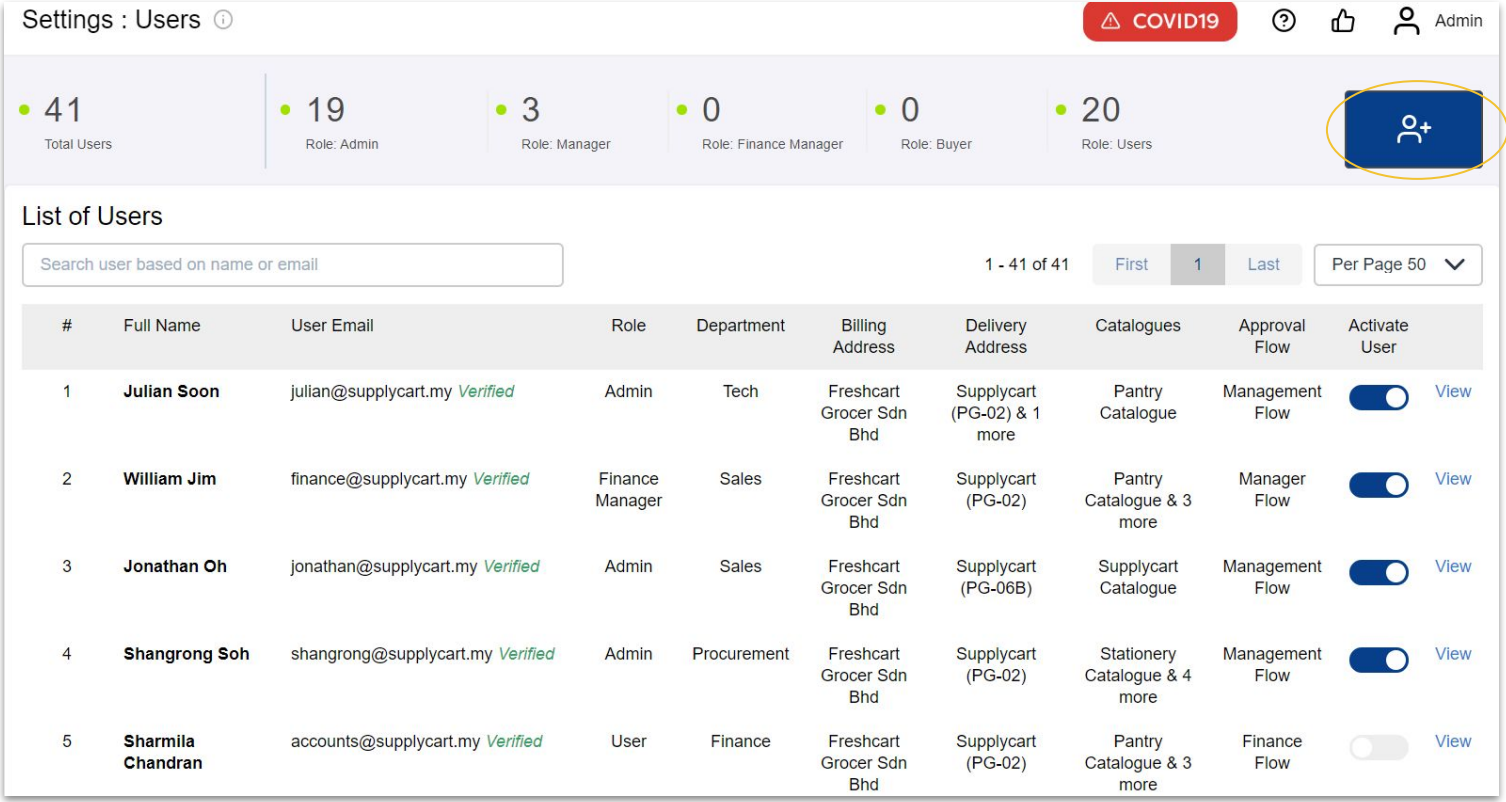
Settings - Users : Invite Users



Click on this icon to **Invite User**

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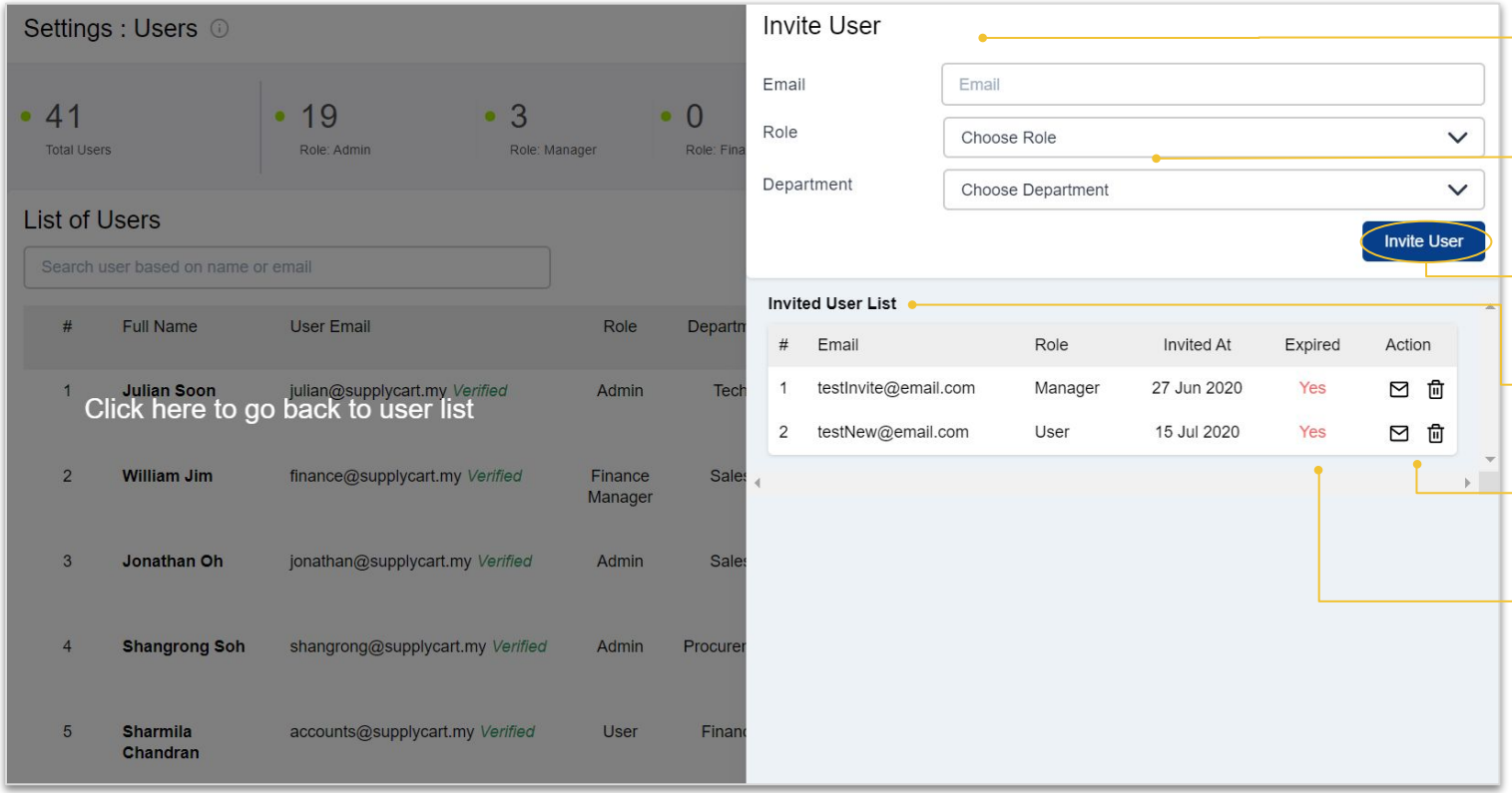
Settings - Users : Invite Users



Input user's **email**

Assign user to a **Role** and **Department**

Click to **Invite User**

List of **invited users**

Manage **invitations**

Status of invitation

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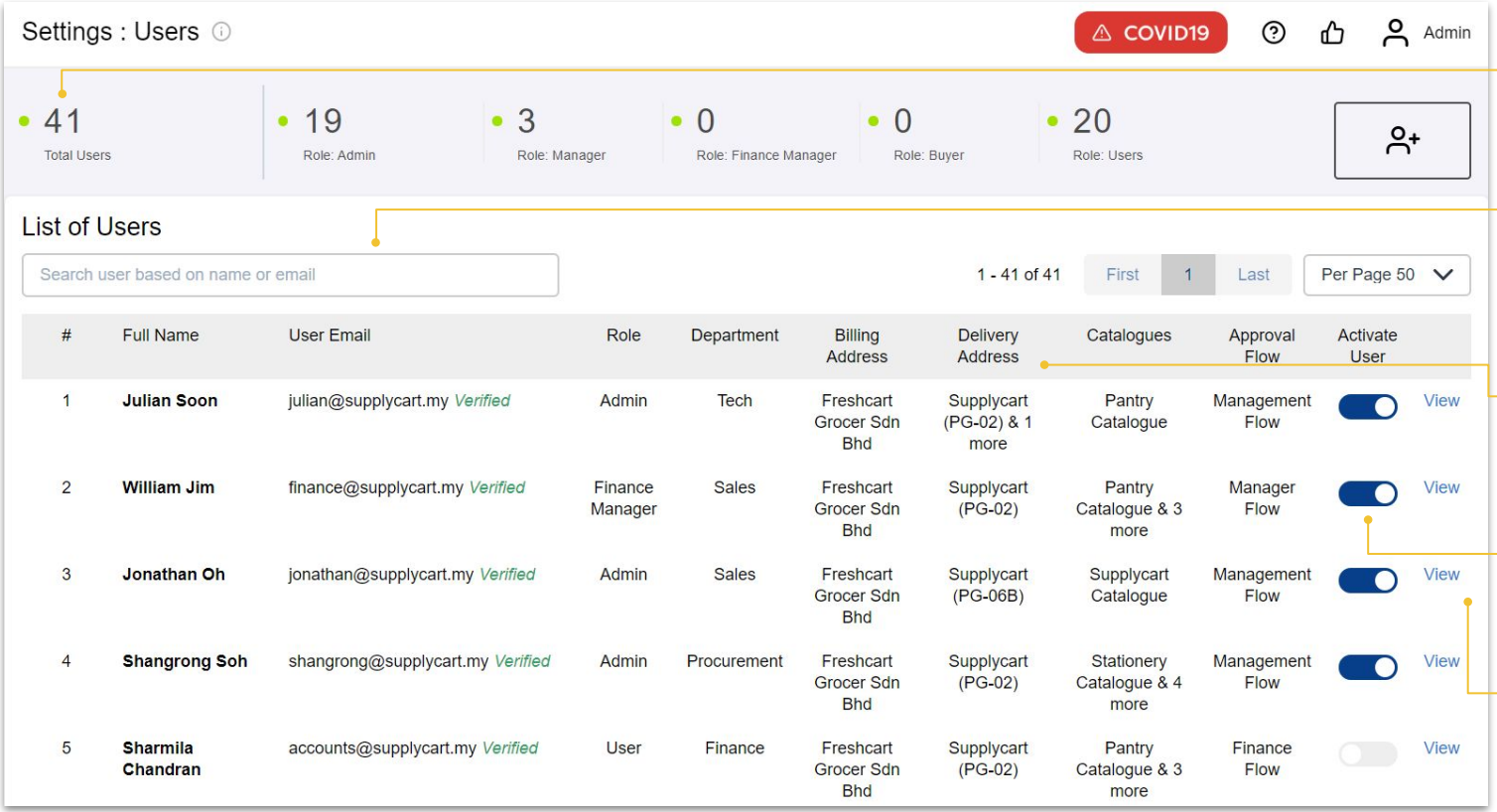
Settings - Users : Manage Users



Current number of **Total Users** and users under **Specific Roles**

Search for a User using **Name** or **Email**

Addresses, Catalogues & Approval Flow user is assigned to

Toggle to **Activate** or **Deactivate** user

Click to **View** and manage user

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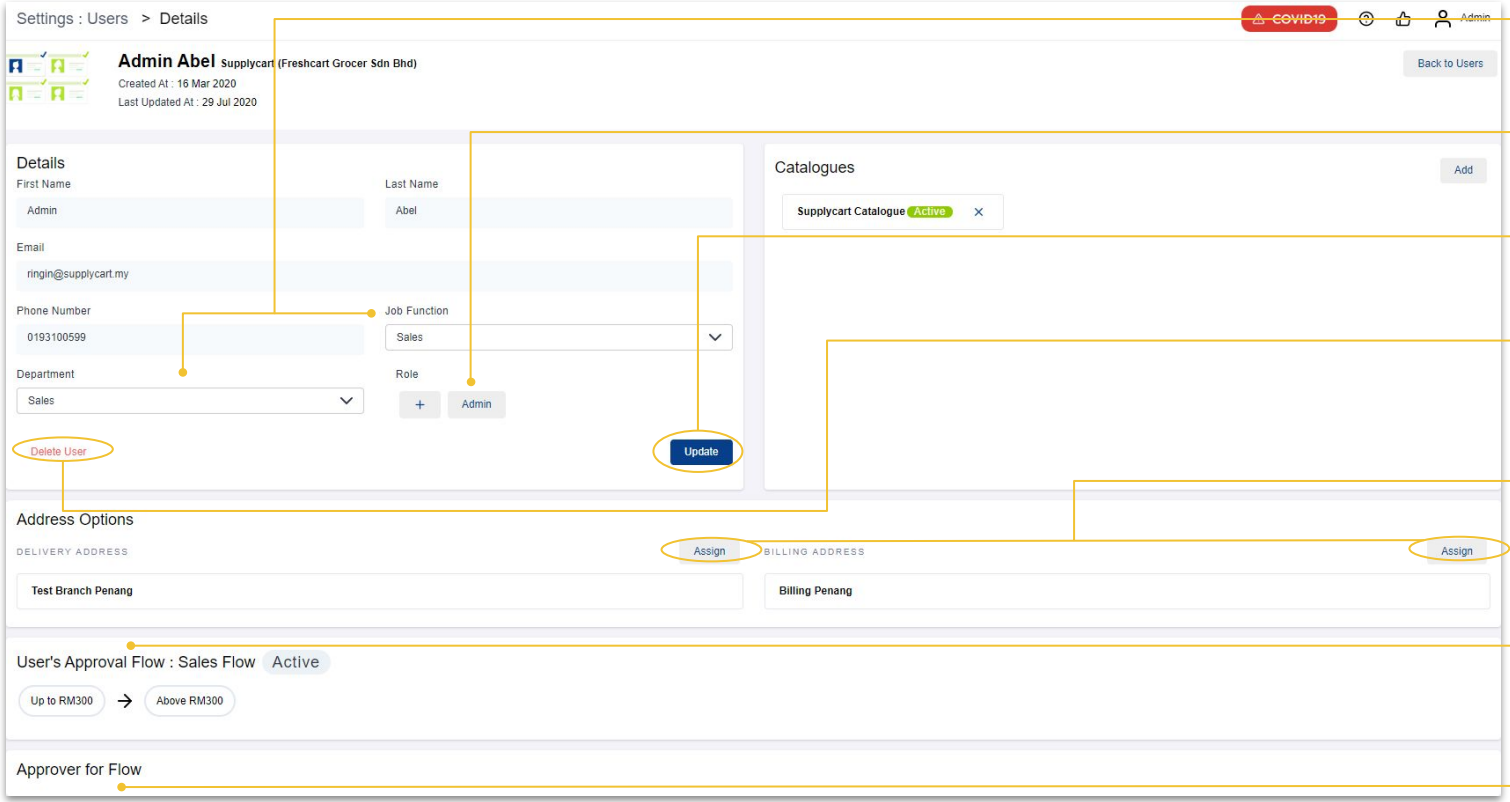
Settings - Users : Manage Users



Update user's **Job Function** & **Department**

Amend user **Roles**

Click on **Update** to save changes

Click to **Delete User**

Assign **Delivery** & **Billing Address** to user and manage existing addresses assigned to user

Approval flow user is assigned to when placing orders

If a user is an **approver** for a flow, it will be shown here

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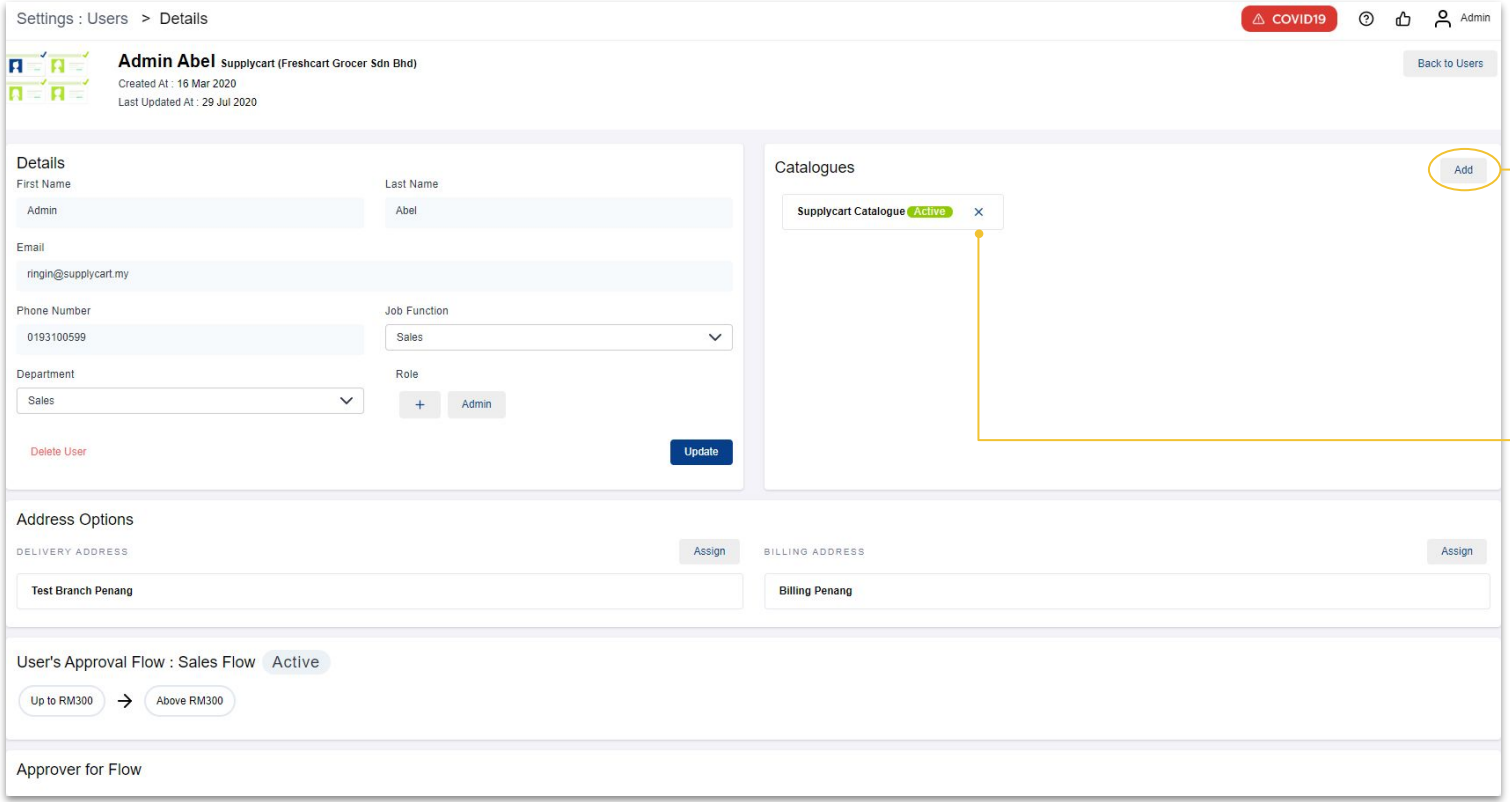
Settings - Users : Manage Users



Assign relevant **Catalogues** to designated user

Remove access to catalogues from the user

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Catalogue Setup

ADAM - Catalogue : Company Catalogue

Side-menu:

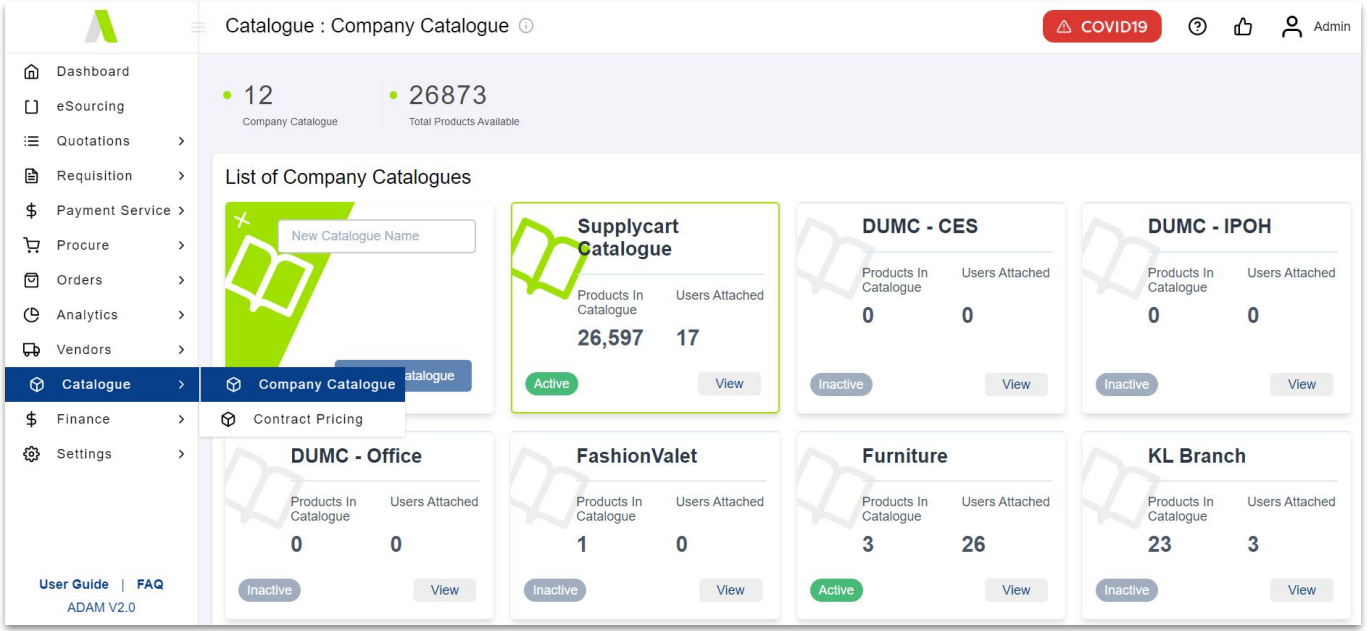
Catalogue > Company Catalogue

Page purpose:

Manage products & user access in the catalogue

Features:

1. Update catalogue settings
2. View/remove current catalogue products
3. Add products into current catalogue



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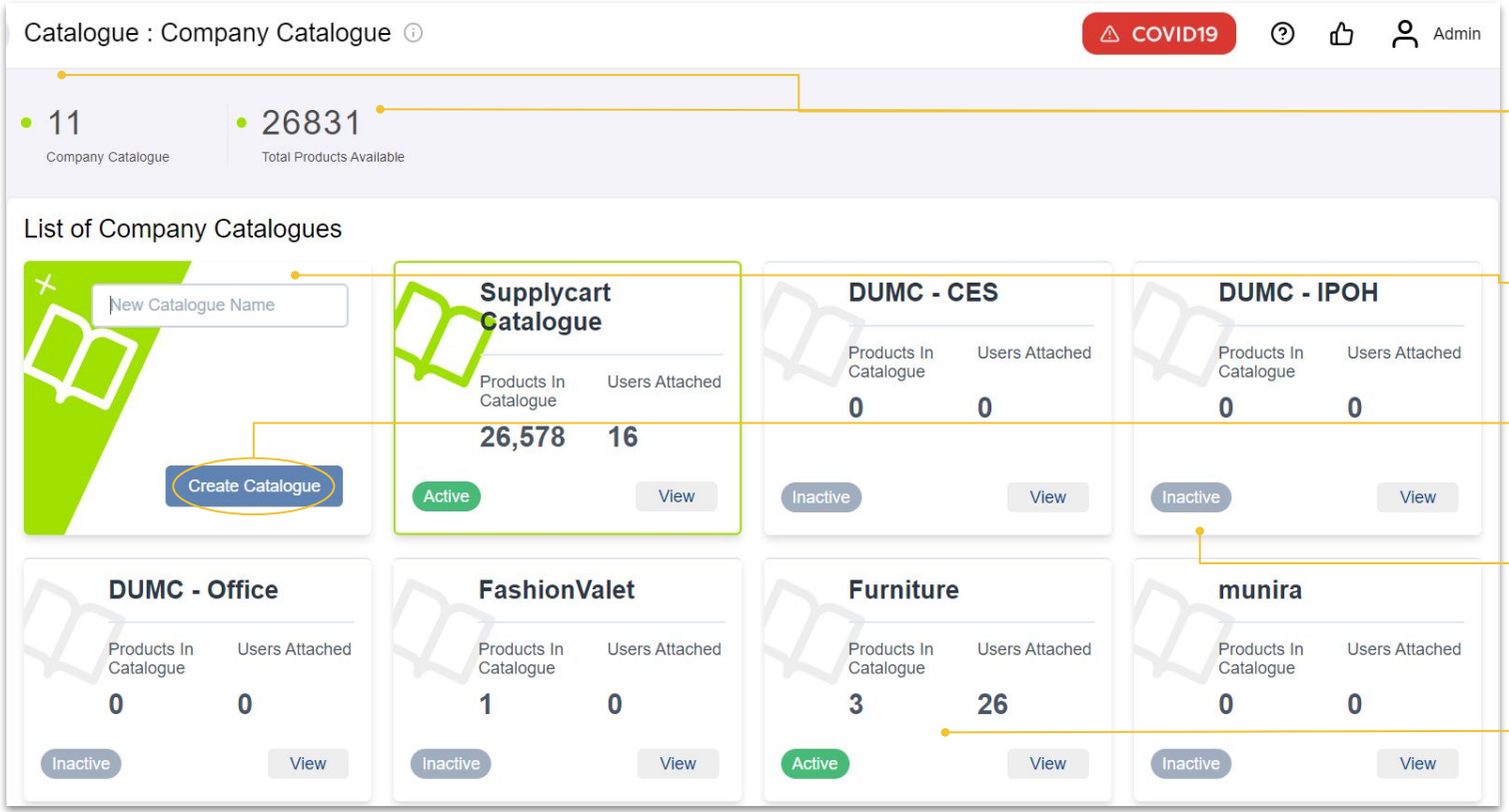
ADAM - Company Catalogue : Creating a new catalogue



View the total number of **products** and **catalogues** available to your company user

Input a **name** for the new catalogue

Click **Create Catalogue** button to create new catalogue

Activation status of the Catalogue

Total number of **products** and **users** assigned to this catalogue

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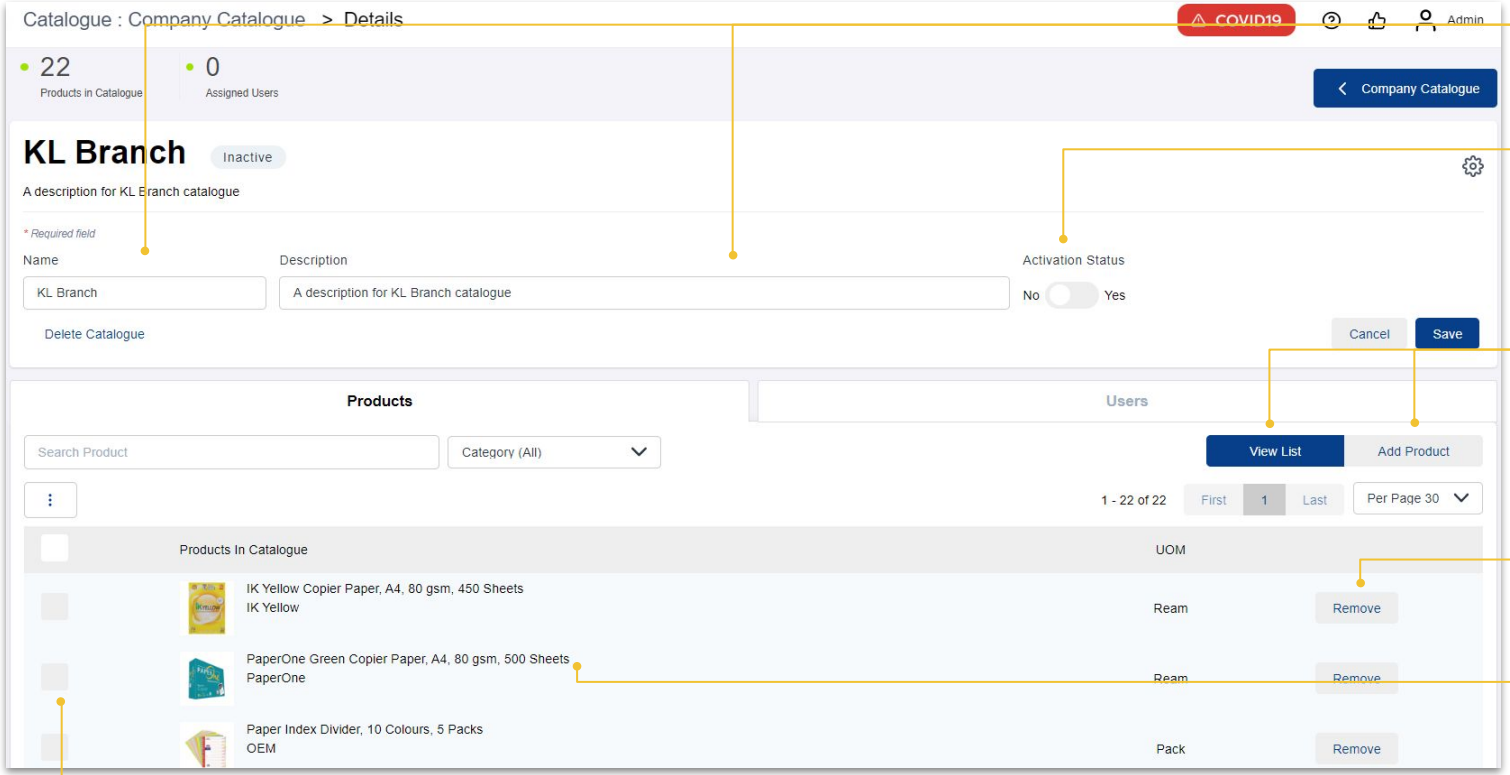
Catalogue - Catalogue Setup : Catalogue Details



Edit the **name** and **description** on each catalogue

Activate/Deactivate the catalogue

Choose between:
View List - view accessible products in this catalogue

Add Product - view full range of products in Supplycart's database

Remove selected product from catalogue

Click to view more product **details**

Select **checkbox** to execute bulk action on selected products

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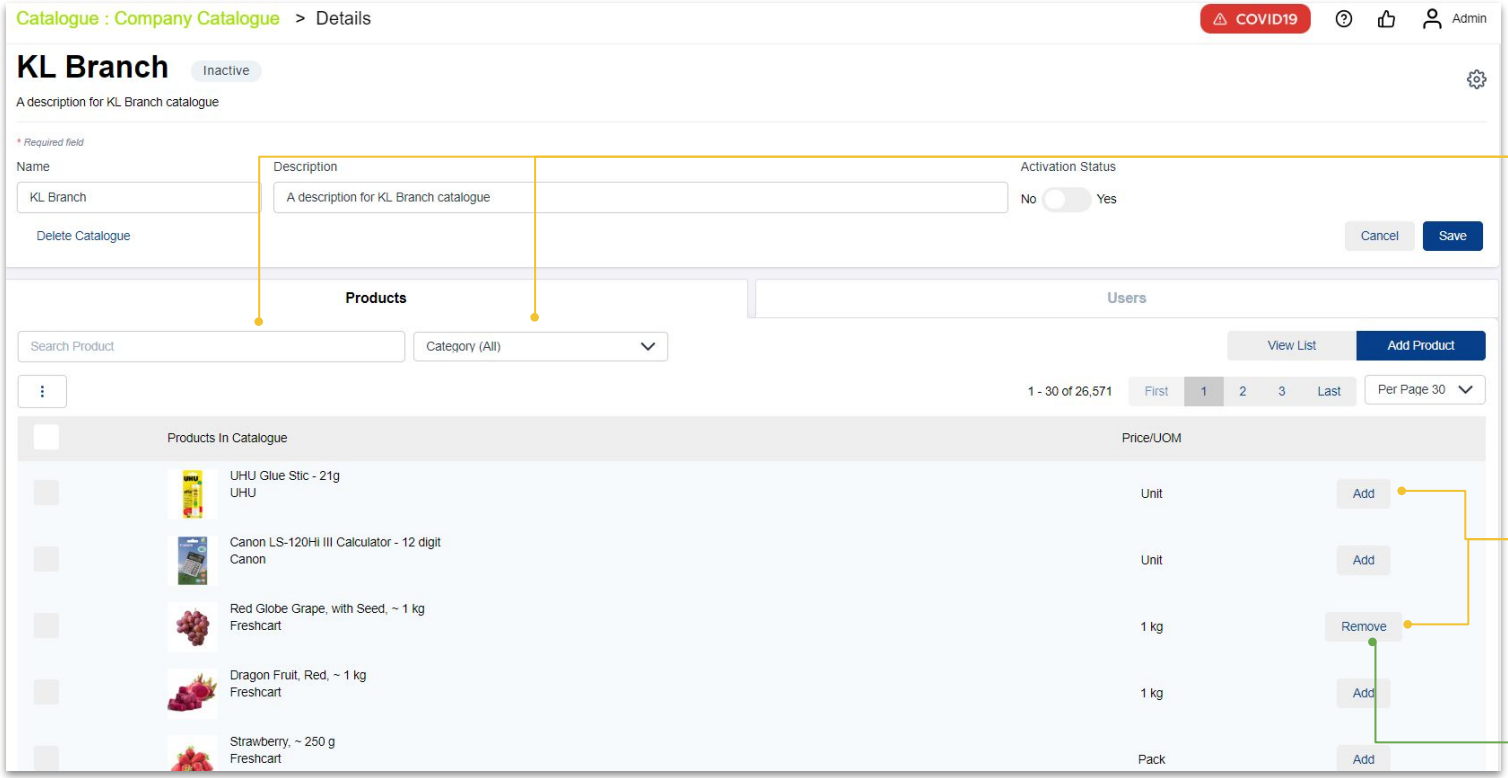
Catalogue - Catalogue Setup : Manage Products



Search or **Filter** the types of products you want to add to the catalogue

Add or **Remove** products into the current catalogue

Note: This product is already in the catalogue

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ADAM - Catalogue Setup : Overview of Users

Side-menu:

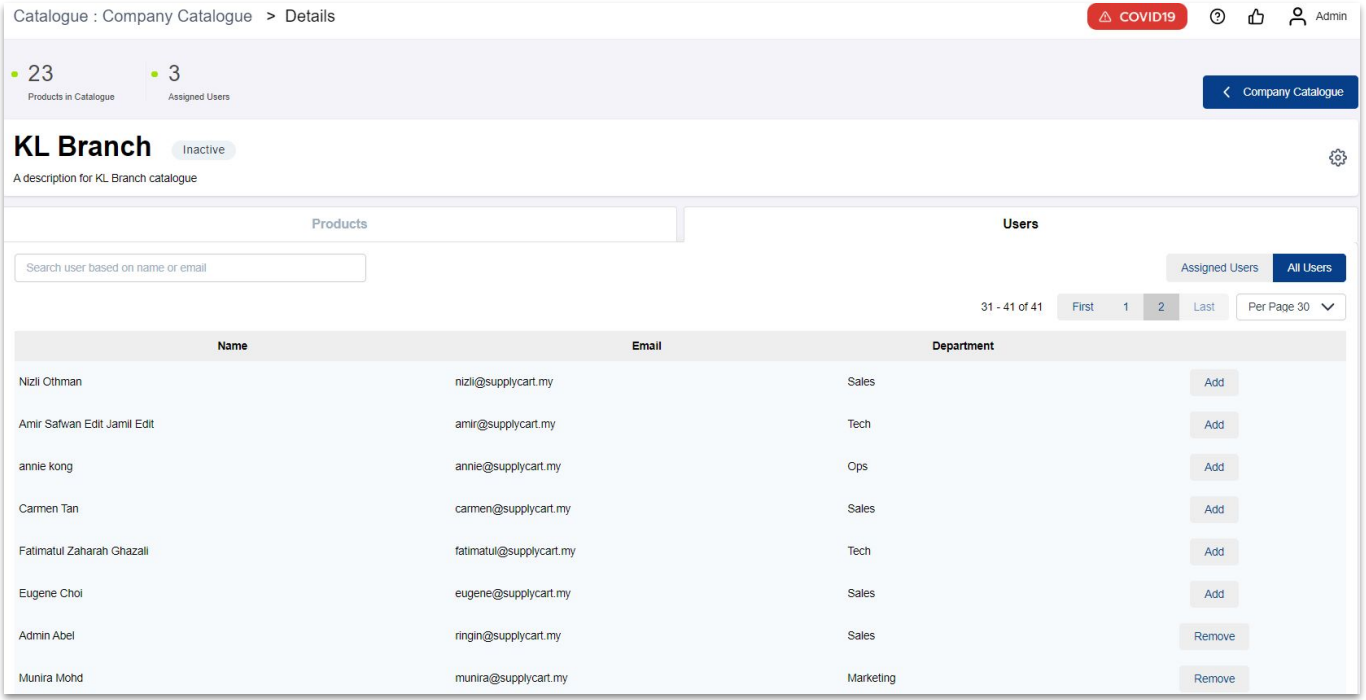
Catalogue > Company Catalogue > Users tab

Page purpose:

Add or remove users from a catalogue

Features:

1. View/remove assigned users
2. Assign users to the catalogue



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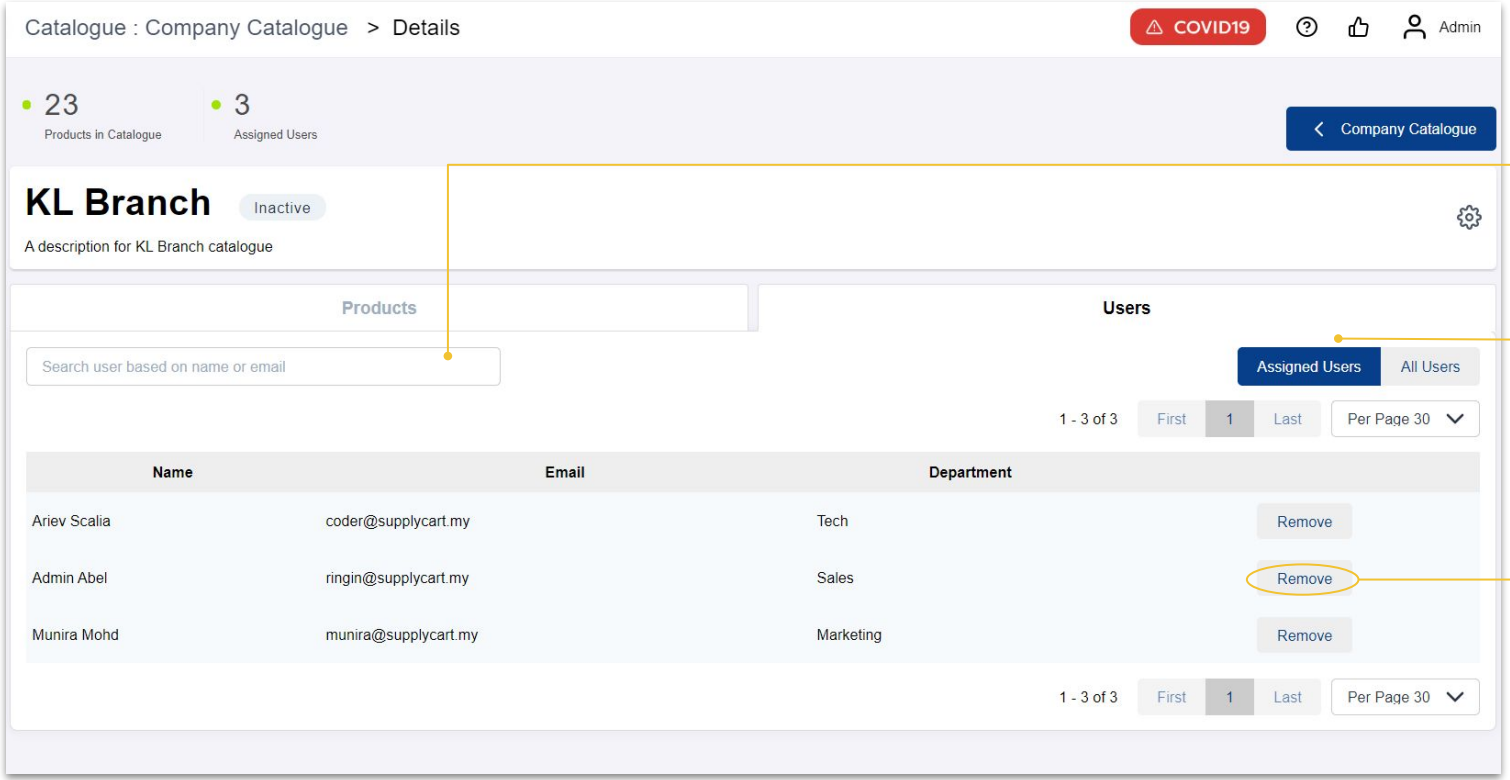
Catalogue - Company Catalogue : Manage Users



Search for an individual user

Displays **current users** that are assigned to this catalogue

Remove users by clicking on the **Remove** button

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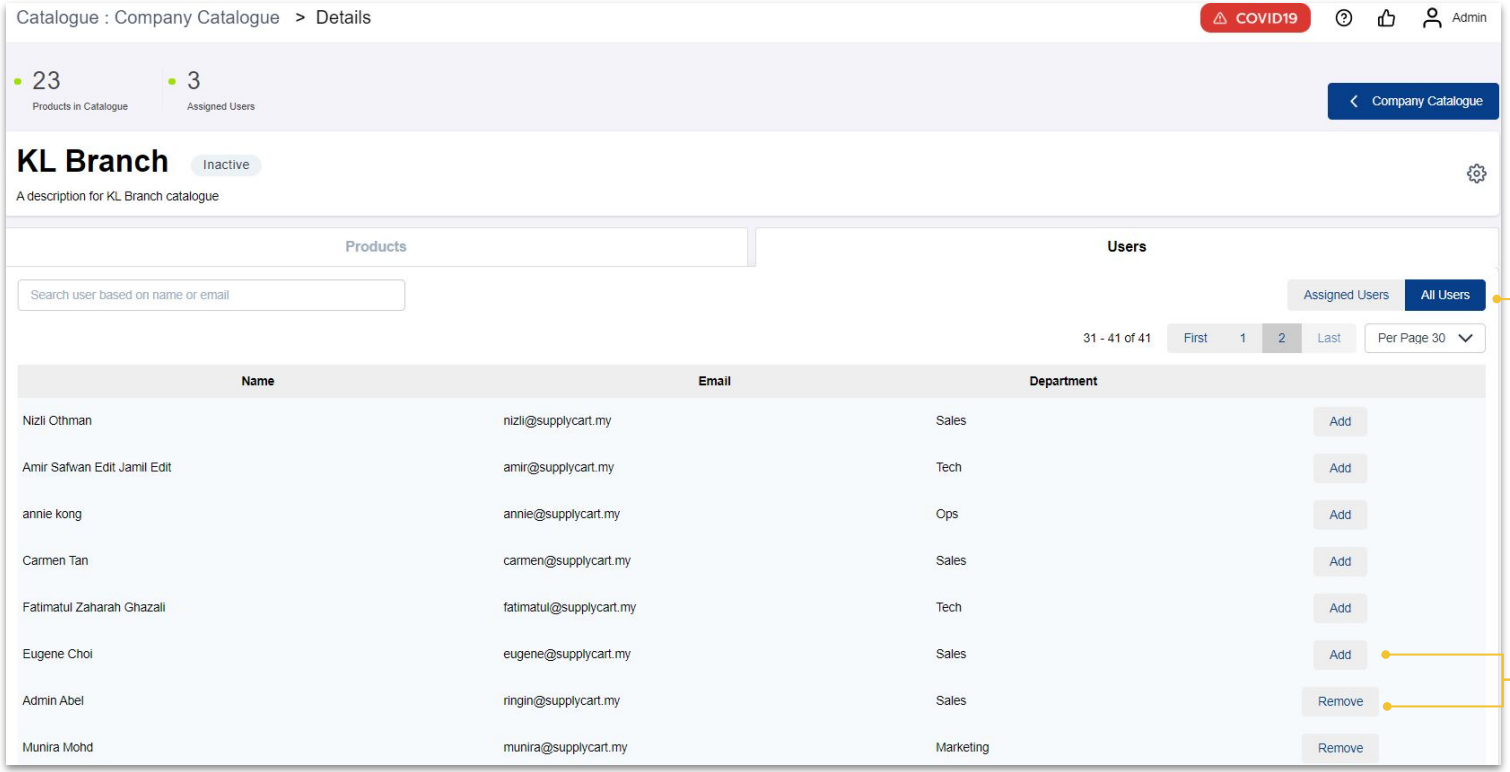
Catalogue - Company Catalogue : Manage Users



All Users displays all users available to be assigned to a catalogue

Add or **Remove** users

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Contract Pricing

ADAM - Catalogue : Contract Pricing

Side-menu:

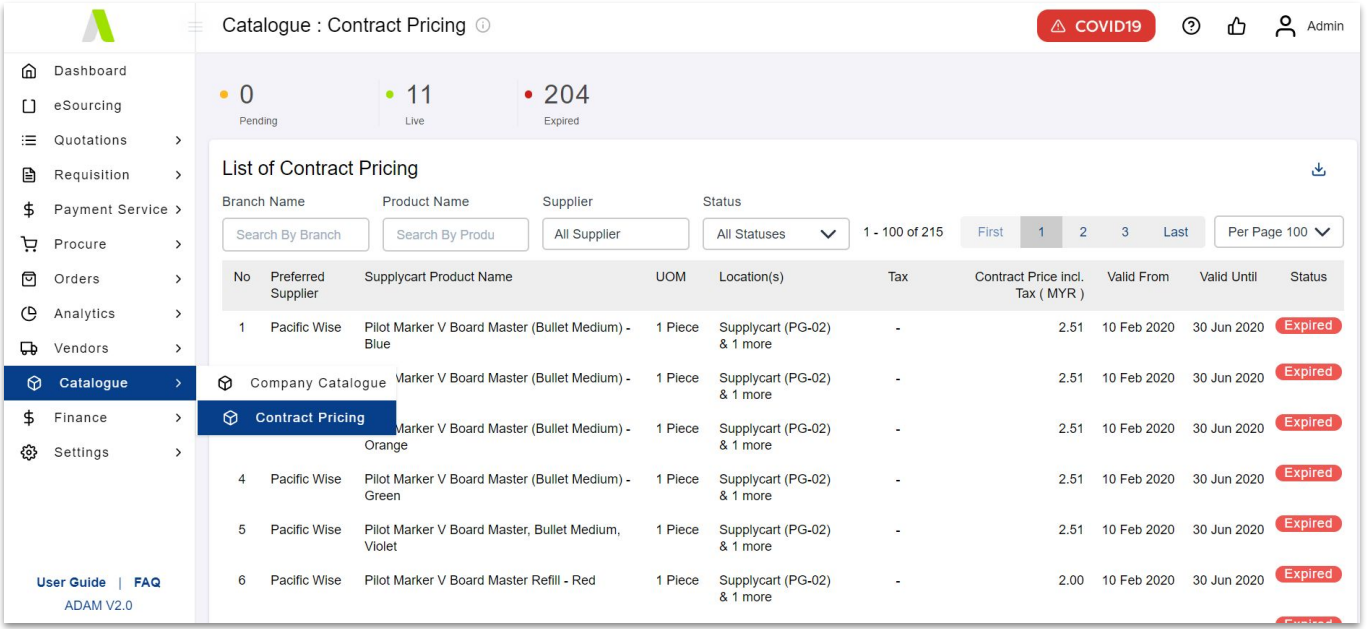
Catalogue > Contract Pricing

Page purpose:

View products with agreed contract pricing setup, current validity period and status

Features:

1. List of products with agreed contract pricing



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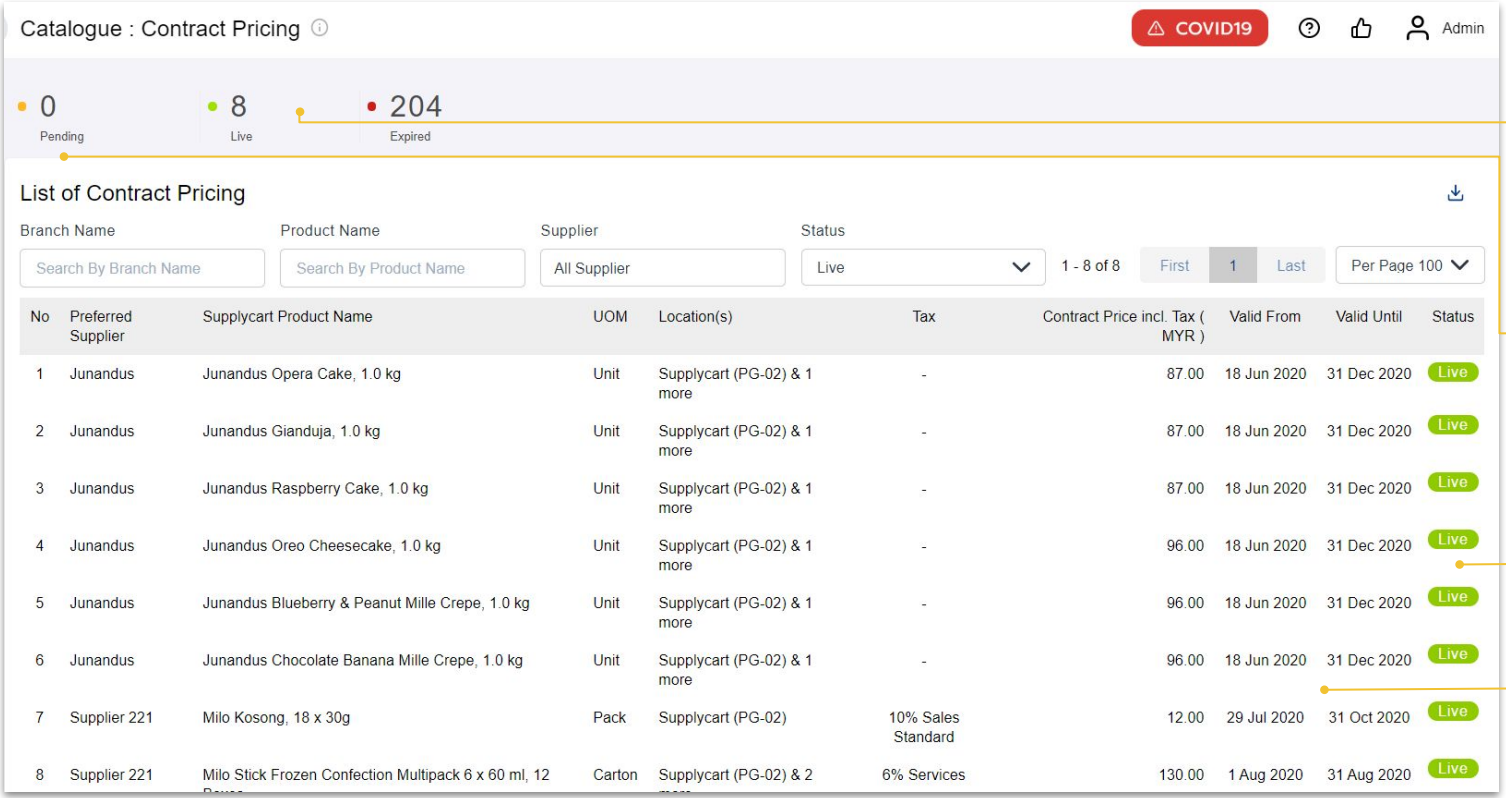
Catalogue - Contract Pricing : List of agreed product prices



Total number of products with **Live** and **Expired** agreed contract pricing

Total number of products with agreed contract pricing that are **not active yet/pending** (i.e. valid in the future)

Current agreement **status** of the item

Validity period of the Agreed Price

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Finance - PO Policy

ADAM - Finance : PO Overview Settings

Side-menu:

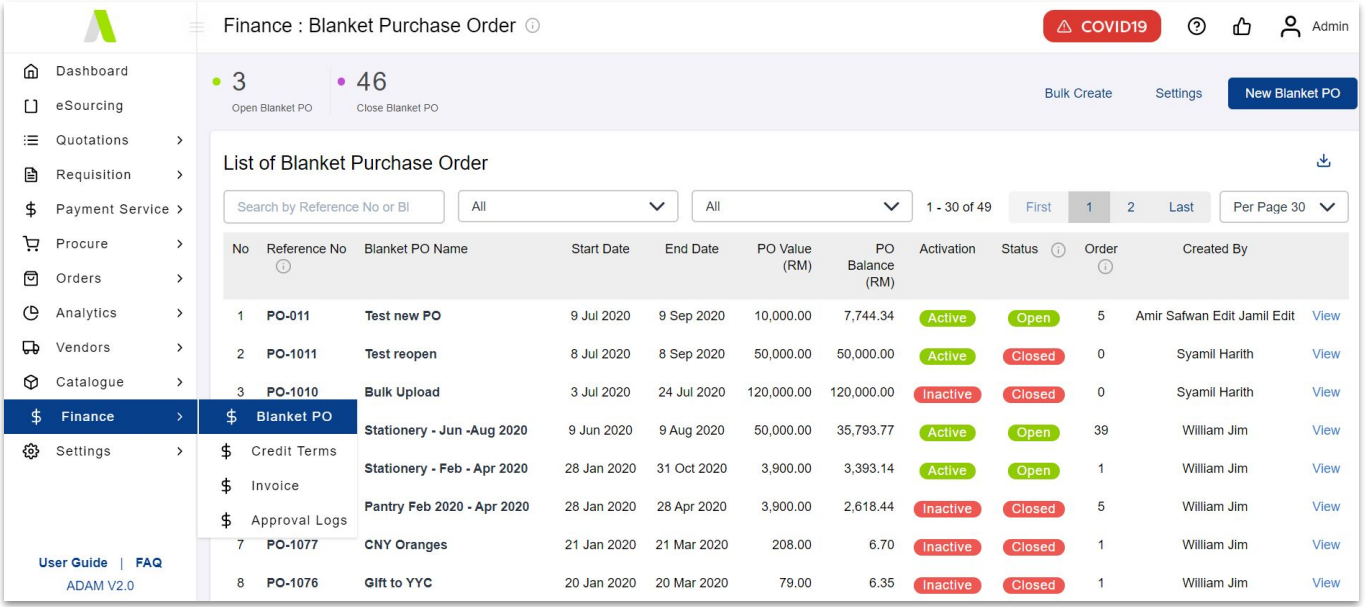
Finance > Blanket PO

Page purpose:

Setting up the company's PO policy setting and monitor Blanket POs

Features:

1. Setup your company's PO policy setting
2. Add new Blanket POs
3. Monitor Blanket POs



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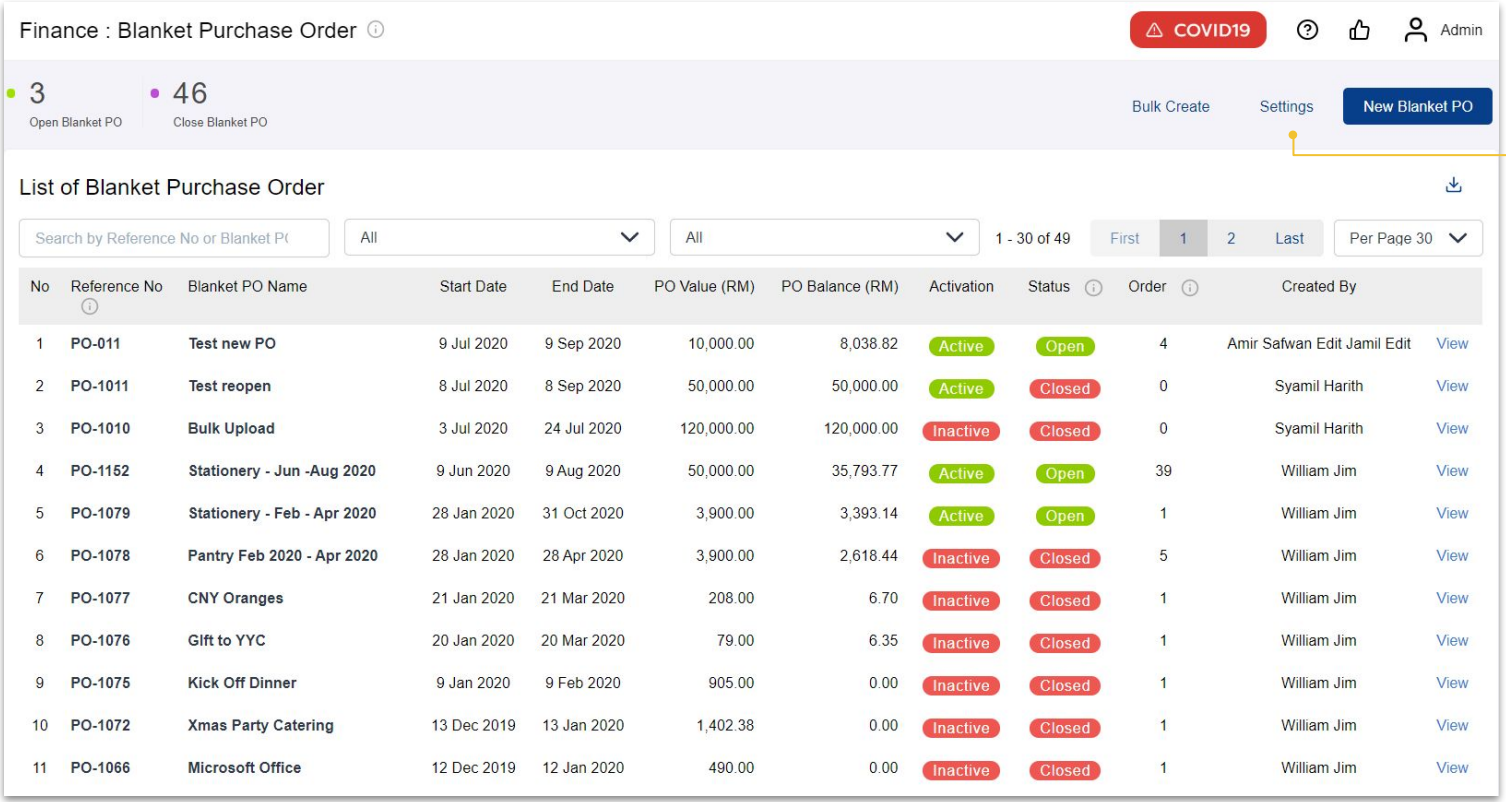
Finance - PO Settings : Company PO Policy Setup



No	Reference No	Blanket PO Name	Start Date	End Date	PO Value (RM)	PO Balance (RM)	Activation	Status	Order	Created By	
1	PO-011	Test new PO	9 Jul 2020	9 Sep 2020	10,000.00	8,038.82	Active	Open	4	Amir Safwan Edit Jamil Edit	View
2	PO-1011	Test reopen	8 Jul 2020	8 Sep 2020	50,000.00	50,000.00	Active	Closed	0	Syamil Harith	View
3	PO-1010	Bulk Upload	3 Jul 2020	24 Jul 2020	120,000.00	120,000.00	Inactive	Closed	0	Syamil Harith	View
4	PO-1152	Stationery - Jun -Aug 2020	9 Jun 2020	9 Aug 2020	50,000.00	35,793.77	Active	Open	39	William Jim	View
5	PO-1079	Stationery - Feb - Apr 2020	28 Jan 2020	31 Oct 2020	3,900.00	3,393.14	Active	Open	1	William Jim	View
6	PO-1078	Pantry Feb 2020 - Apr 2020	28 Jan 2020	28 Apr 2020	3,900.00	2,618.44	Inactive	Closed	5	William Jim	View
7	PO-1077	CNY Oranges	21 Jan 2020	21 Mar 2020	208.00	6.70	Inactive	Closed	1	William Jim	View
8	PO-1076	Gift to YYC	20 Jan 2020	20 Mar 2020	79.00	6.35	Inactive	Closed	1	William Jim	View
9	PO-1075	Kick Off Dinner	9 Jan 2020	9 Feb 2020	905.00	0.00	Inactive	Closed	1	William Jim	View
10	PO-1072	Xmas Party Catering	13 Dec 2019	13 Jan 2020	1,402.38	0.00	Inactive	Closed	1	William Jim	View
11	PO-1066	Microsoft Office	12 Dec 2019	12 Jan 2020	490.00	0.00	Inactive	Closed	1	William Jim	View

Click on **Settings** to begin setup based on your company's PO policy

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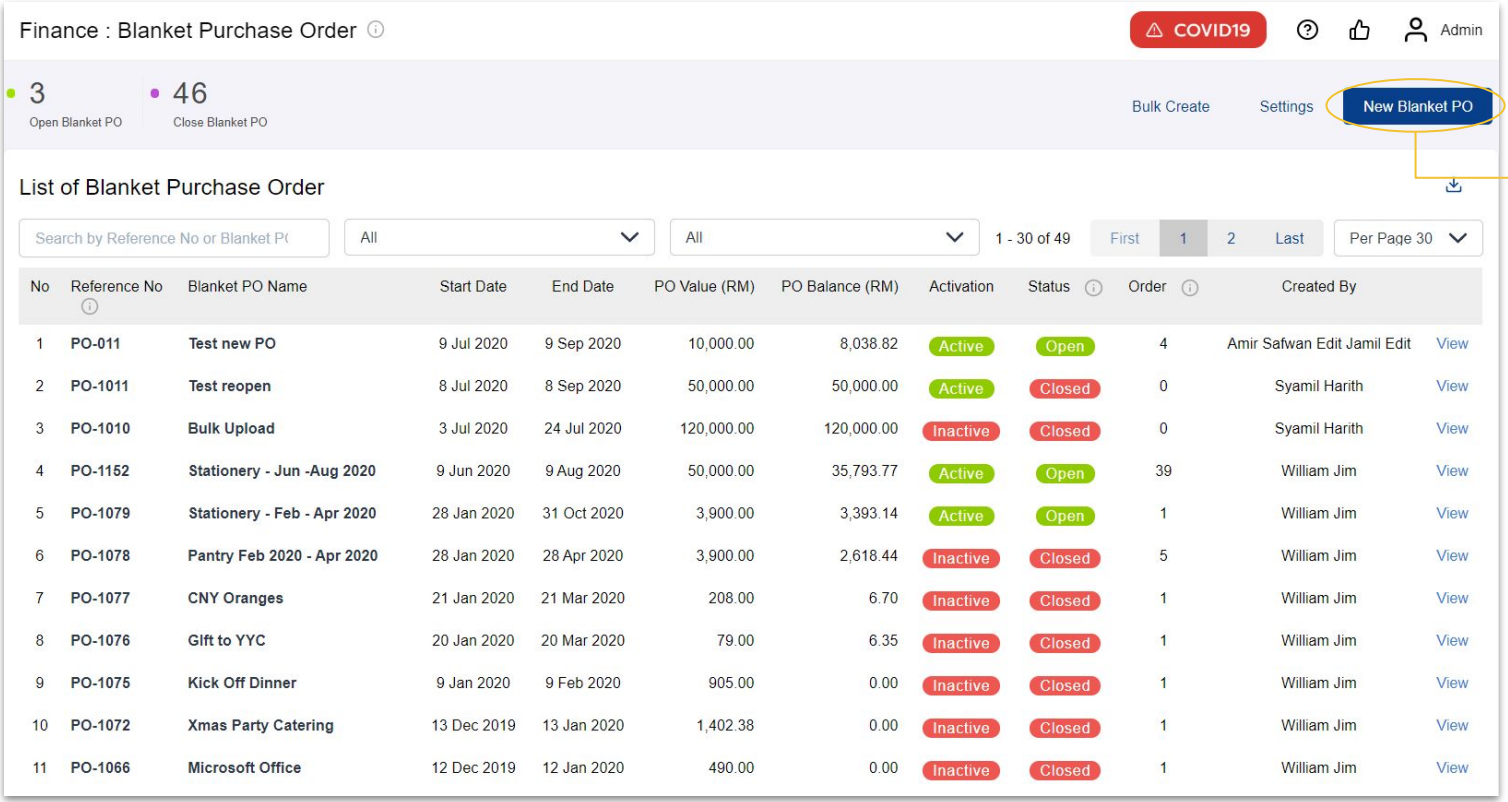
Finance - PO Settings : Create New Blanket PO (Overview)



No	Reference No	Blanket PO Name	Start Date	End Date	PO Value (RM)	PO Balance (RM)	Activation	Status	Order	Created By	
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5	PO-1079	Stationery - Feb - Apr 2020	28 Jan 2020	31 Oct 2020	3,900.00	3,393.14	Active	Open	1	William Jim	View
6	PO-1078	Pantry Feb 2020 - Apr 2020	28 Jan 2020	28 Apr 2020	3,900.00	2,618.44	Inactive	Closed	5	William Jim	View
7	PO-1077	CNY Oranges	21 Jan 2020	21 Mar 2020	208.00	6.70	Inactive	Closed	1	William Jim	View
8	PO-1076	Gift to YYC	20 Jan 2020	20 Mar 2020	79.00	6.35	Inactive	Closed	1	William Jim	View
9	PO-1075	Kick Off Dinner	9 Jan 2020	9 Feb 2020	905.00	0.00	Inactive	Closed	1	William Jim	View
10	PO-1072	Xmas Party Catering	13 Dec 2019	13 Jan 2020	1,402.38	0.00	Inactive	Closed	1	William Jim	View
11	PO-1066	Microsoft Office	12 Dec 2019	12 Jan 2020	490.00	0.00	Inactive	Closed	1	William Jim	View

Click to create a **New Blanket PO**

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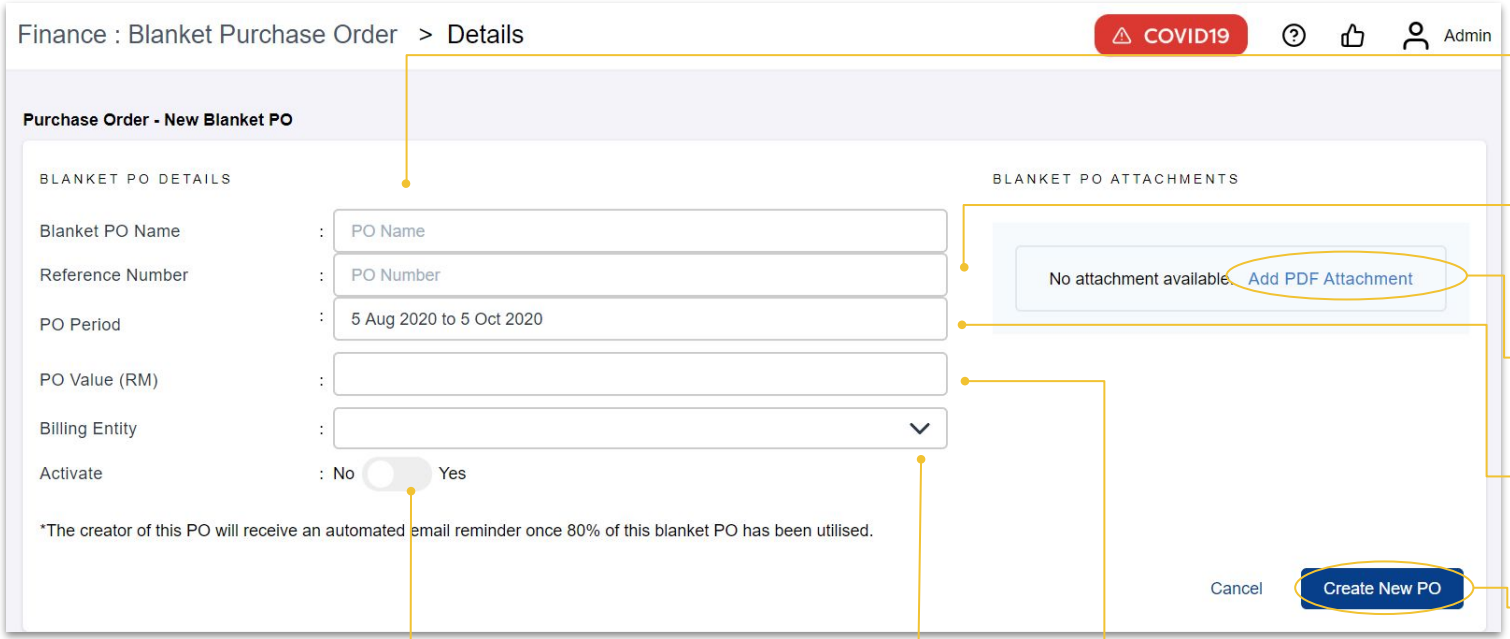
Finance - PO Settings : Create New Blanket PO (Overview)



Input Blanket PO **Name**

Input **Reference Number** (this must be inputted in Blanket PO section during order placement

Click to **Add PDF** of the PO

Duration of Blanket PO validity

Click to create a **New Blanket PO**

Blanket PO **amount** which can be spent

Toggle to **activate/deactivate PO**

Select **Billing Entity** for this Blanket PO

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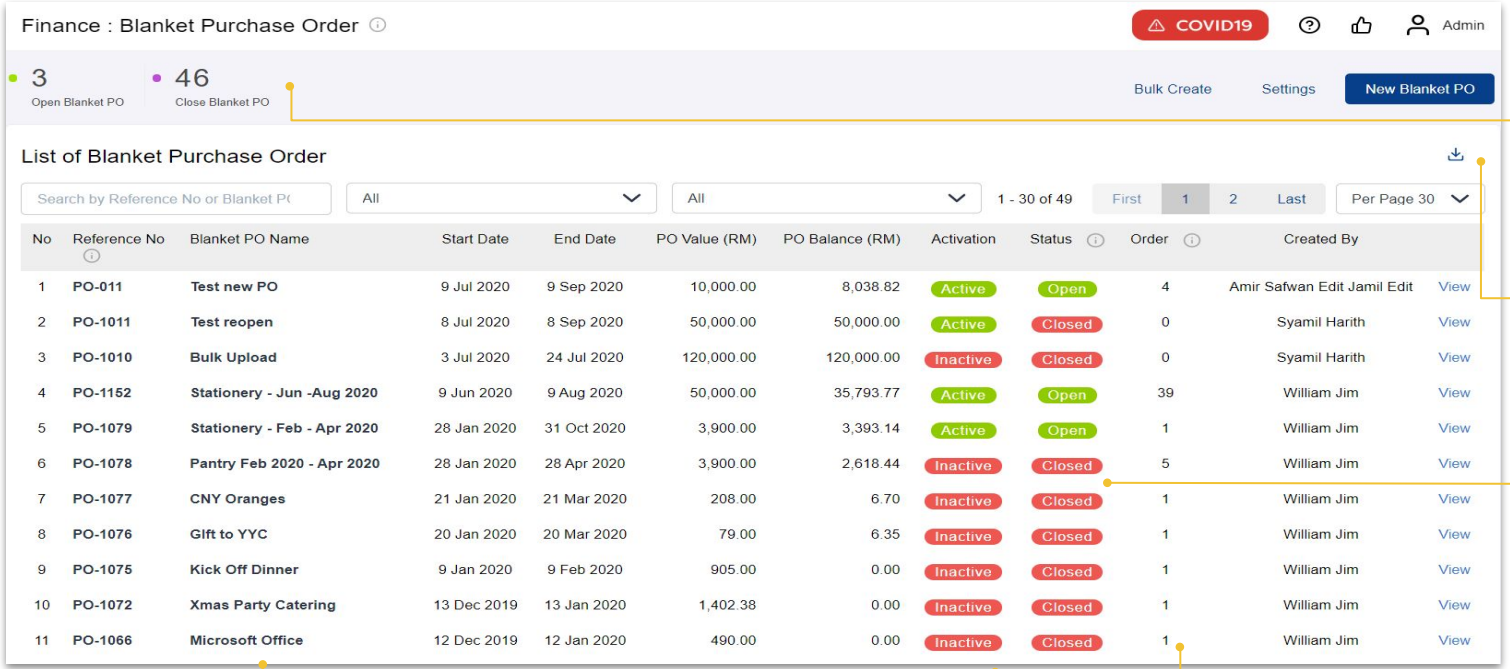
Finance - PO Settings : Monitor Blanket POs



View the total number of **Open** and **Closed** Blanket PO

Click on this icon to **Download CSV** of entire Blanket PO table

Status of Blanket PO (Note: **Closed** POs have past the end date)

Number of orders using the selected Blanket PO

Click on **PO Name** to see details of the Blanket PO

This shows whether the selected Blanket PO is **Active/Inactive**

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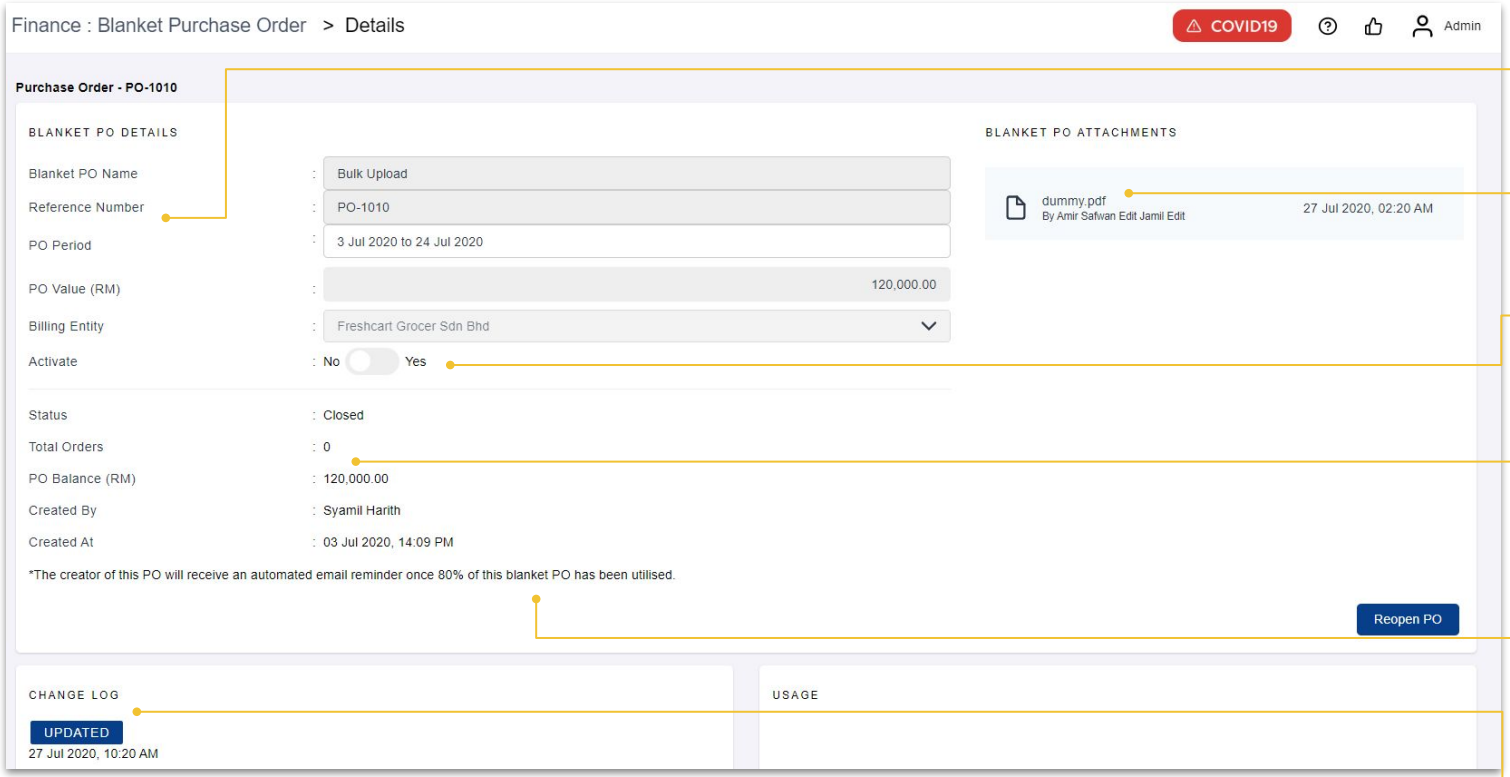
Finance - PO Settings : Create New Blanket PO



Update the **Name, Reference ID,** or **Validity Period**

View the attached PO document

Toggle to **Activate/Deactivate** PO

View the total number of orders that have used this PO, and the remaining amount

A reminder email will be sent to the creator of the Blanket PO when 80% of the amount is spent

Changes made to PO will be updated in **Change Log**

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Finance - Credit Terms

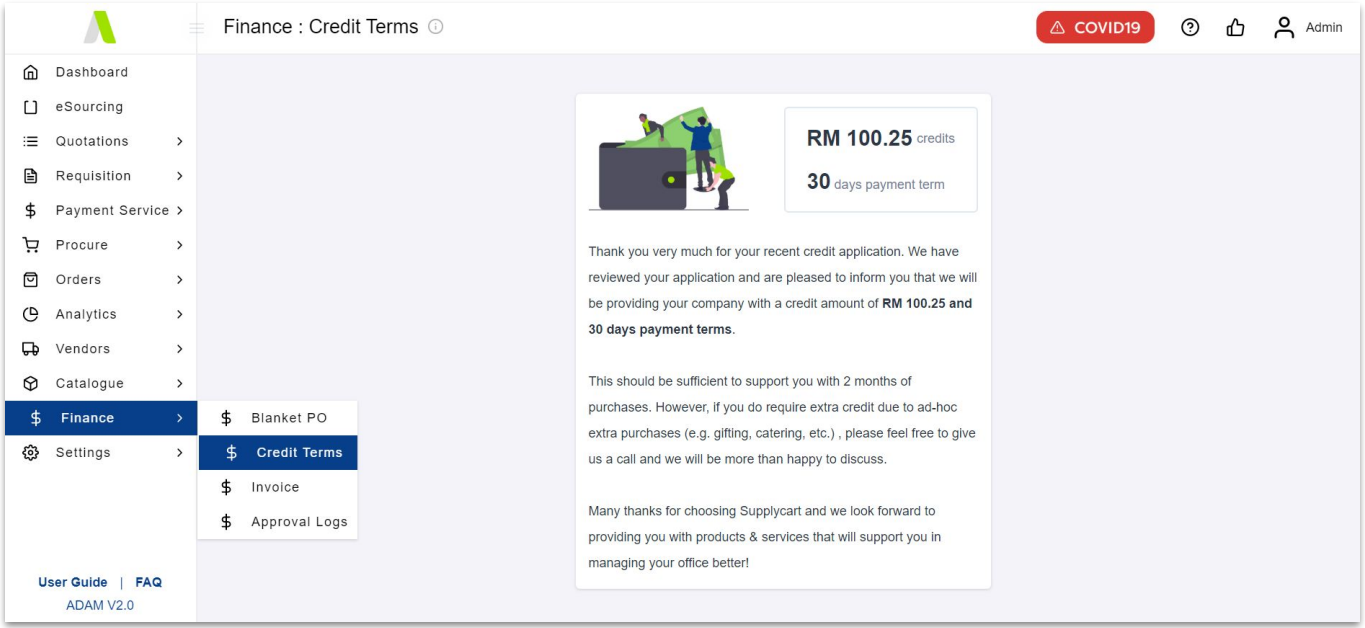
ADAM - Finance : Credit Terms

Side-menu:

Finance > Credit Terms

Page purpose:

View your company's approved credit amount and payment term days



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Vendors

ADAM - Vendors : Overview

Side-menu:

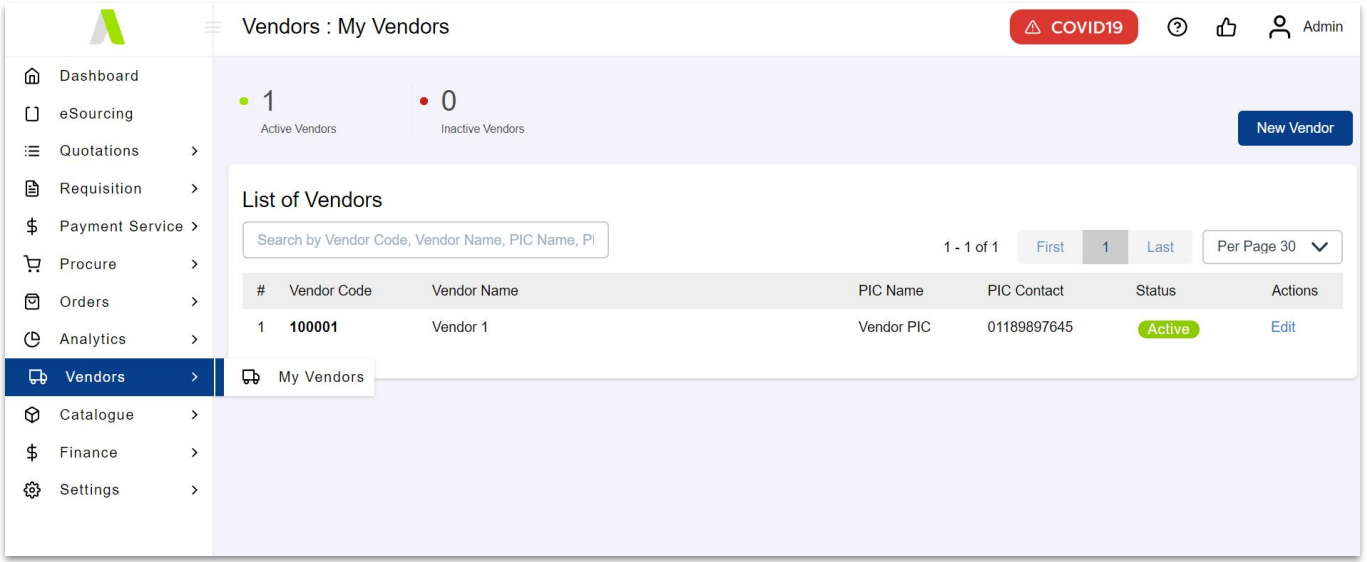
Vendors > MyVendors

Page purpose:

View and manage your company's vendors

Features:

1. View and manage existing Vendors
2. Add new Vendors



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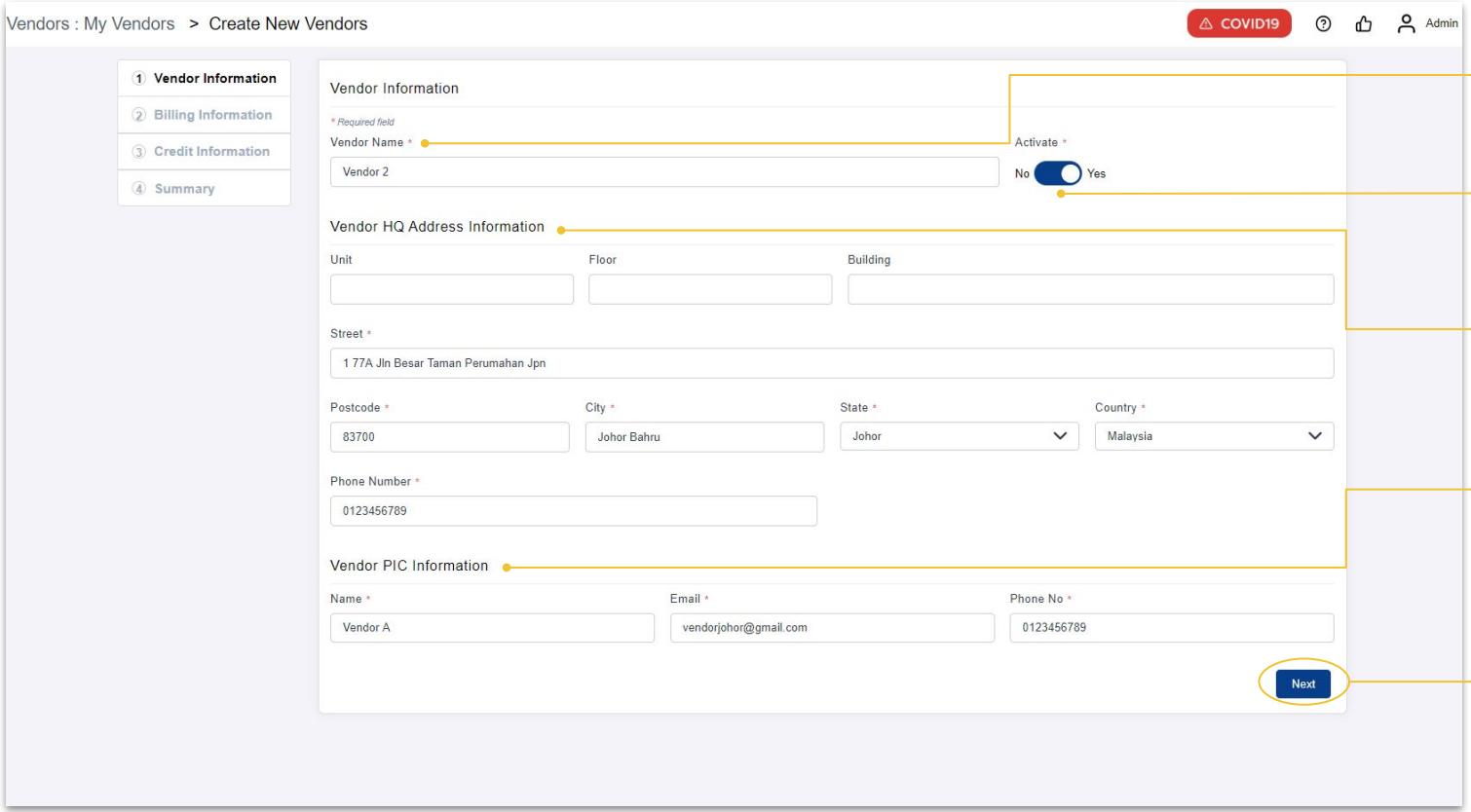
Vendors - My Vendors : Create New Vendor



Input **Vendor Name**

Toggle to **Activate/Deactivate** vendor

Key in vendor's **Headquarter Address Information**

Key in the information for the vendor's **Person In-charge**

Click **Next** to move to the following section

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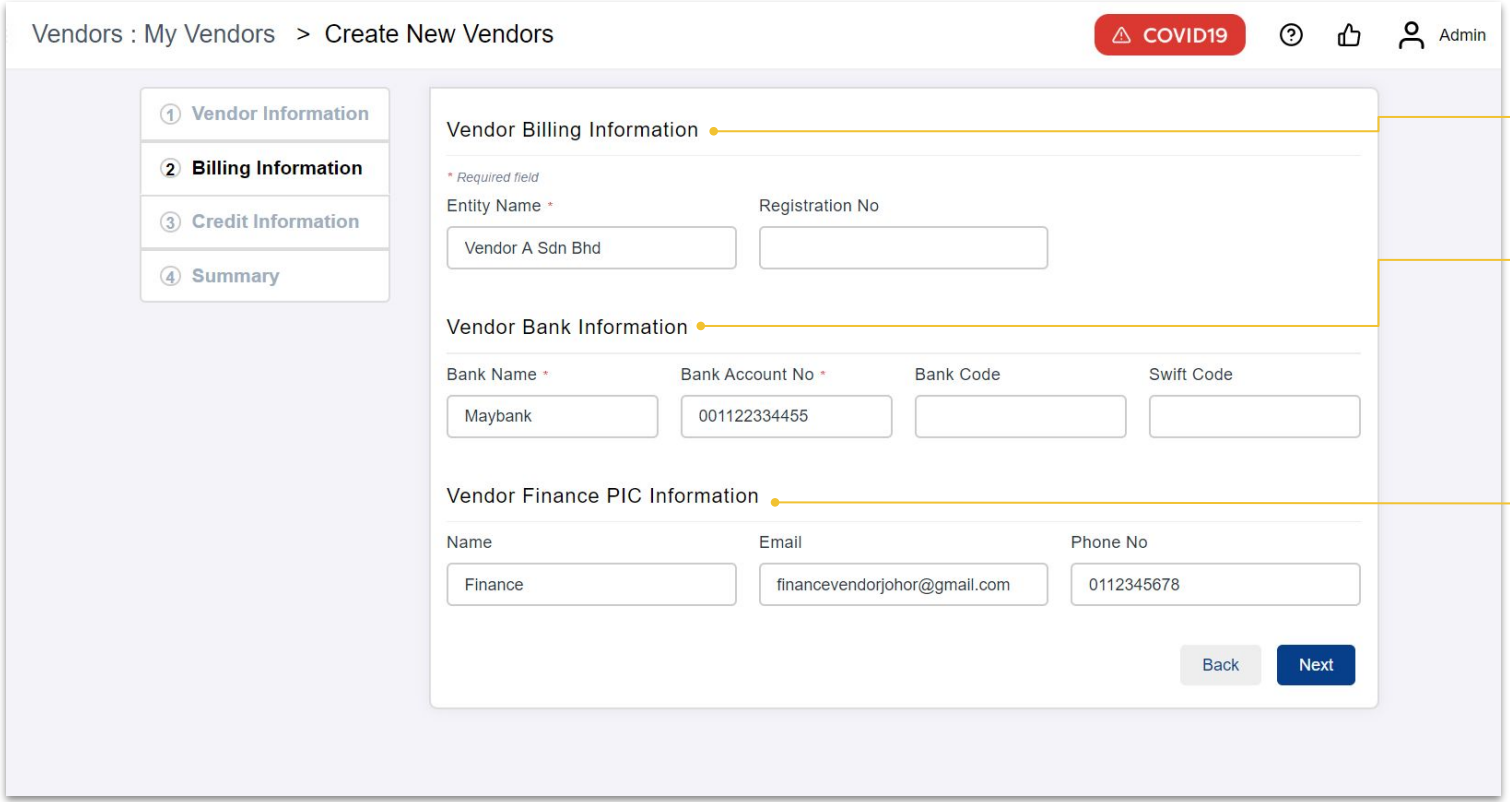
Vendors - Create New Vendor : Billing Information



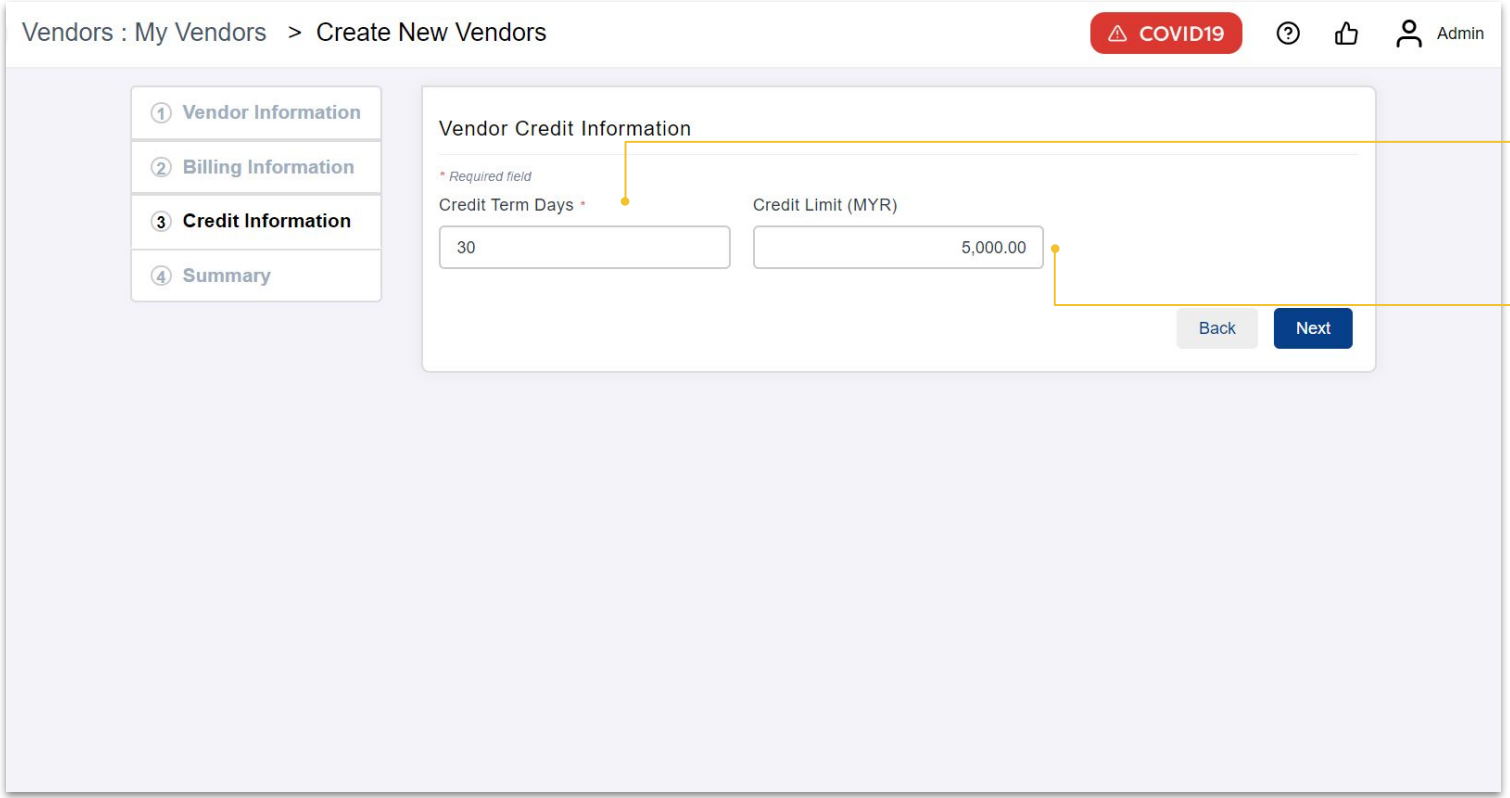
Input vendor's Billing **Entity Name** & Registration No (if relevant)

Input vendor's **Bank Information**

Input information for vendor's **Finance Person In-charge (PIC)**

* PIC Information should be the person in-charge of billing and finance related matters

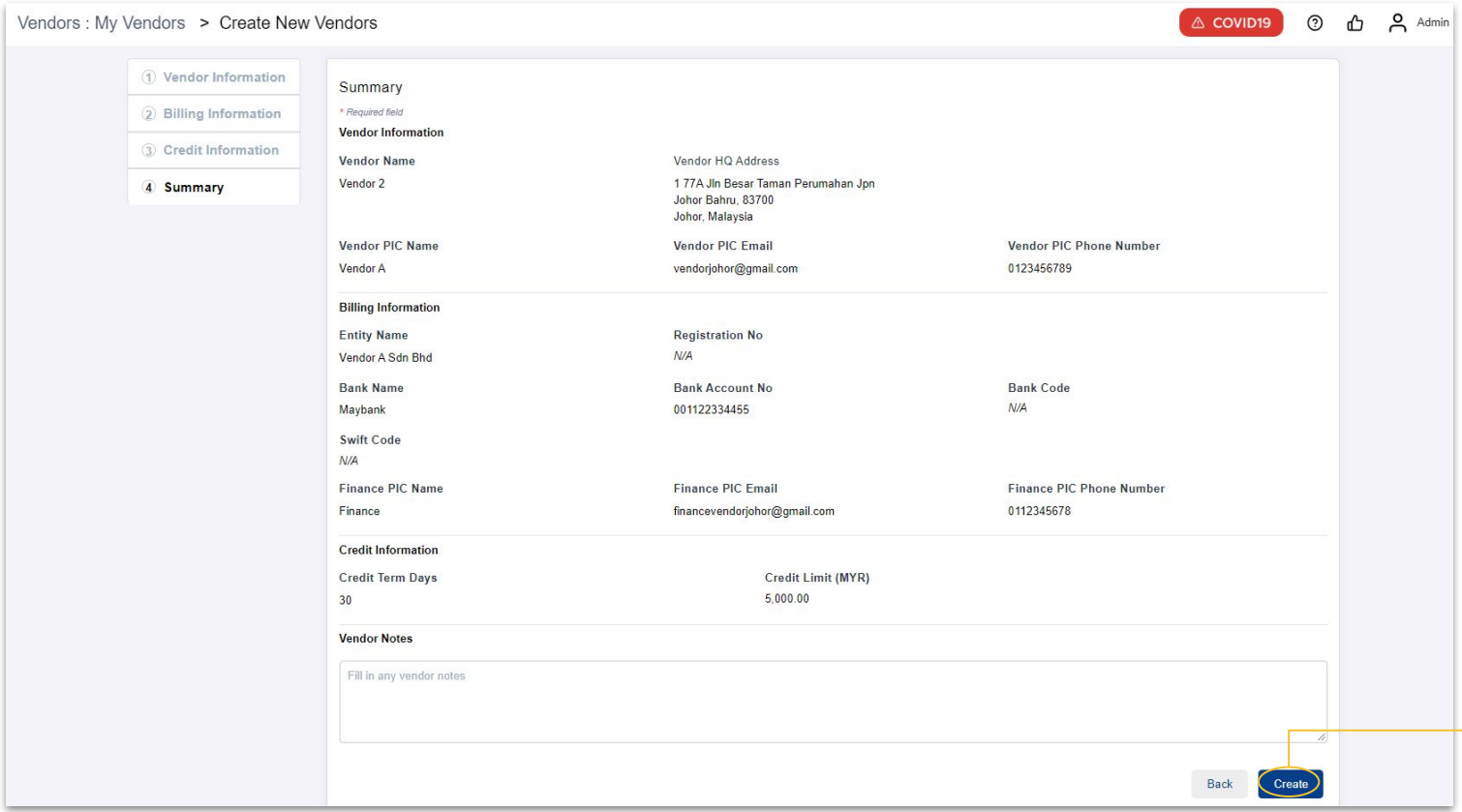
Vendors - Create New Vendor : Credit Information



Key in the **Credit Term Days** for the vendor

Key in the set **Credit Limit** for the selected vendor

Vendors - Create New Vendor : Summary



This section shows the **Summary** of your New Vendor

Once you have confirmed all the vendor details are accurate, click on **Create**

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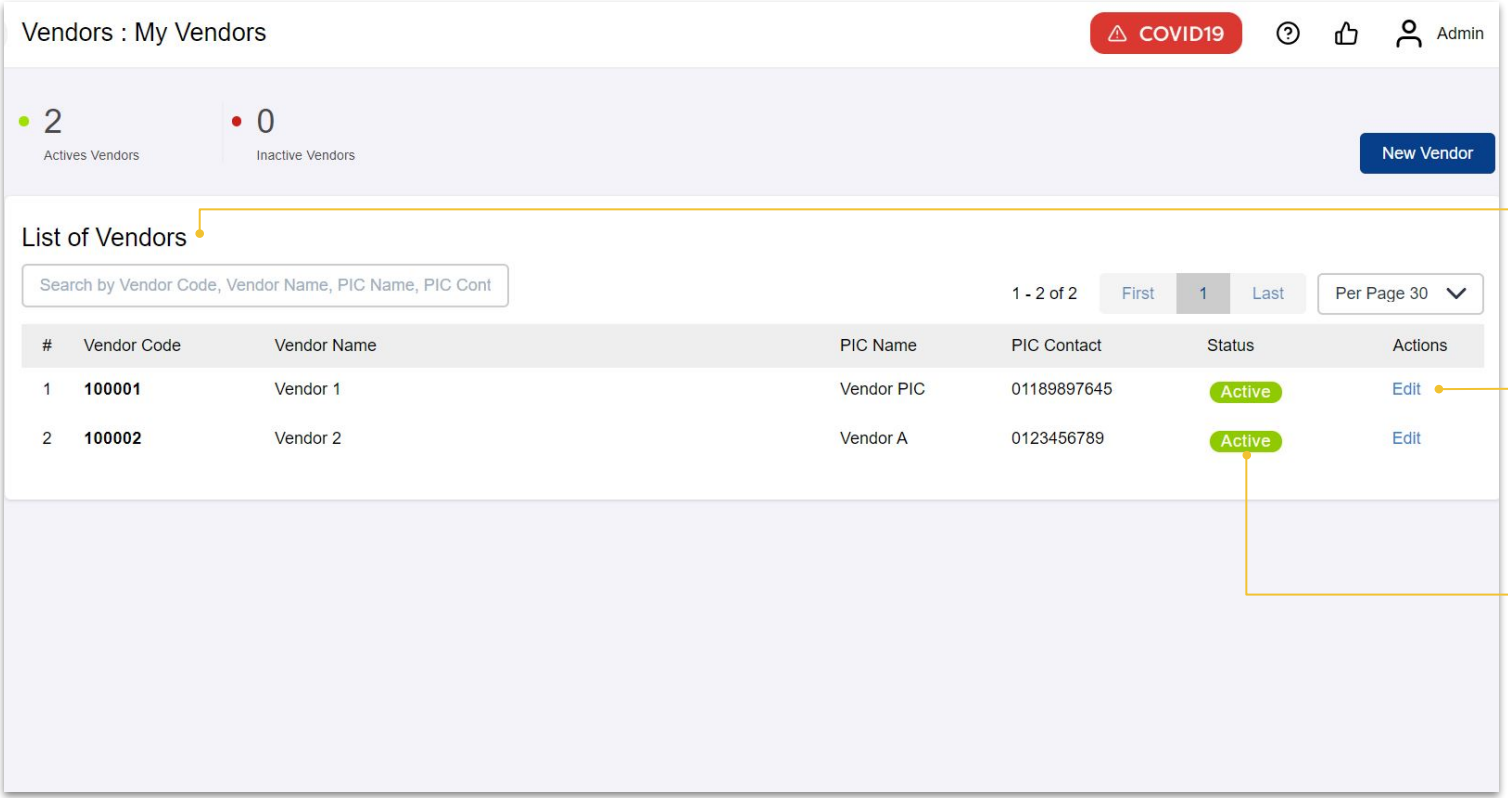
Vendors - My Vendors : View and Manage Vendors



View the list of your company's existing vendors and newly created vendors

Click to **Edit** or view the details of the selected vendor

View the **Status** of selected vendor whether they are Active or Inactive

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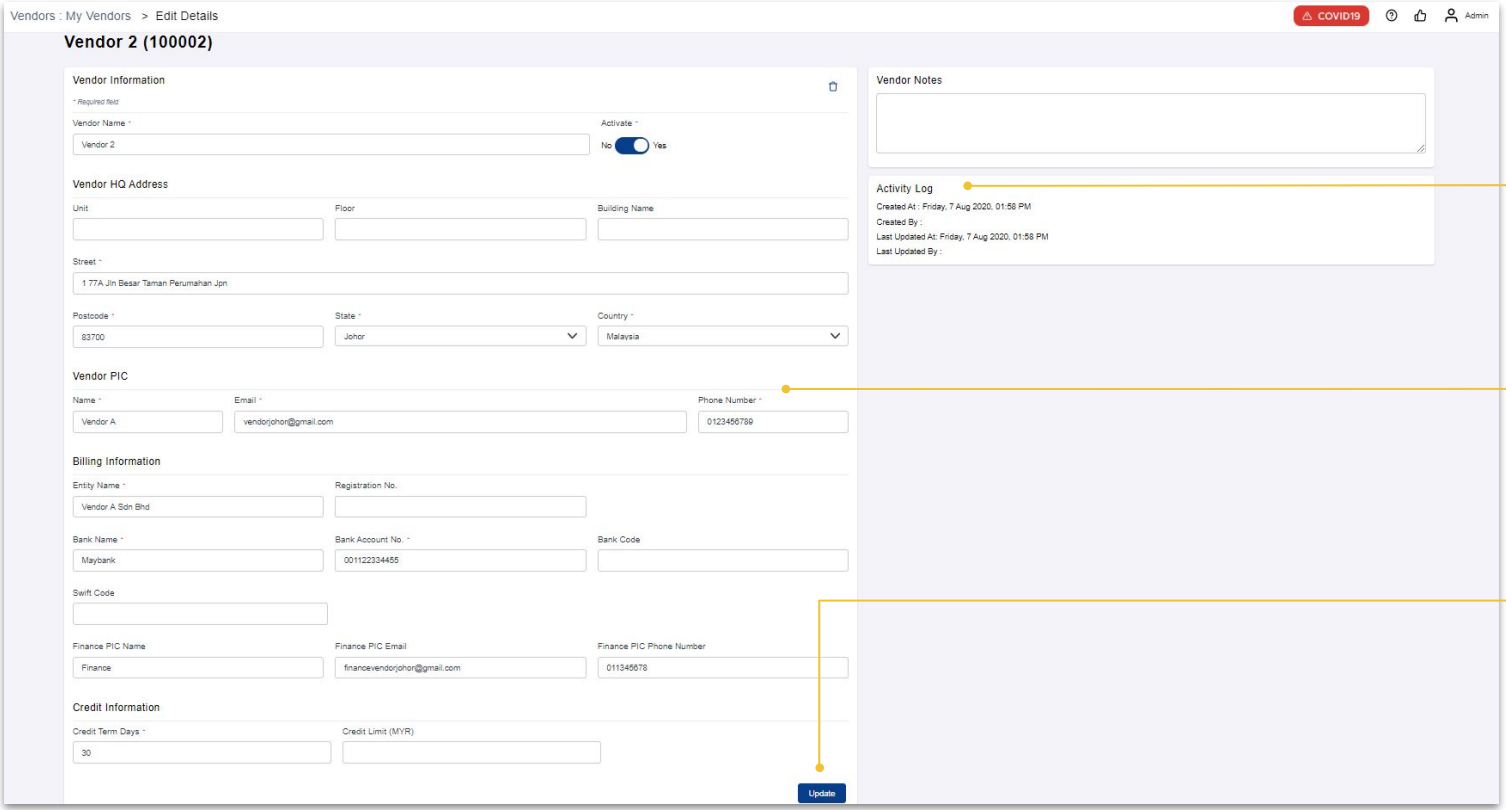
Vendors - My Vendors : View and Manage Vendors



The **Activity Log** shows the data of actions done for this vendor

To update any information, simply input details in the relevant fields

Click on **Update** to save changes made to this vendor

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Requisition

ADAM - Requisition : Overview

Side-menu:

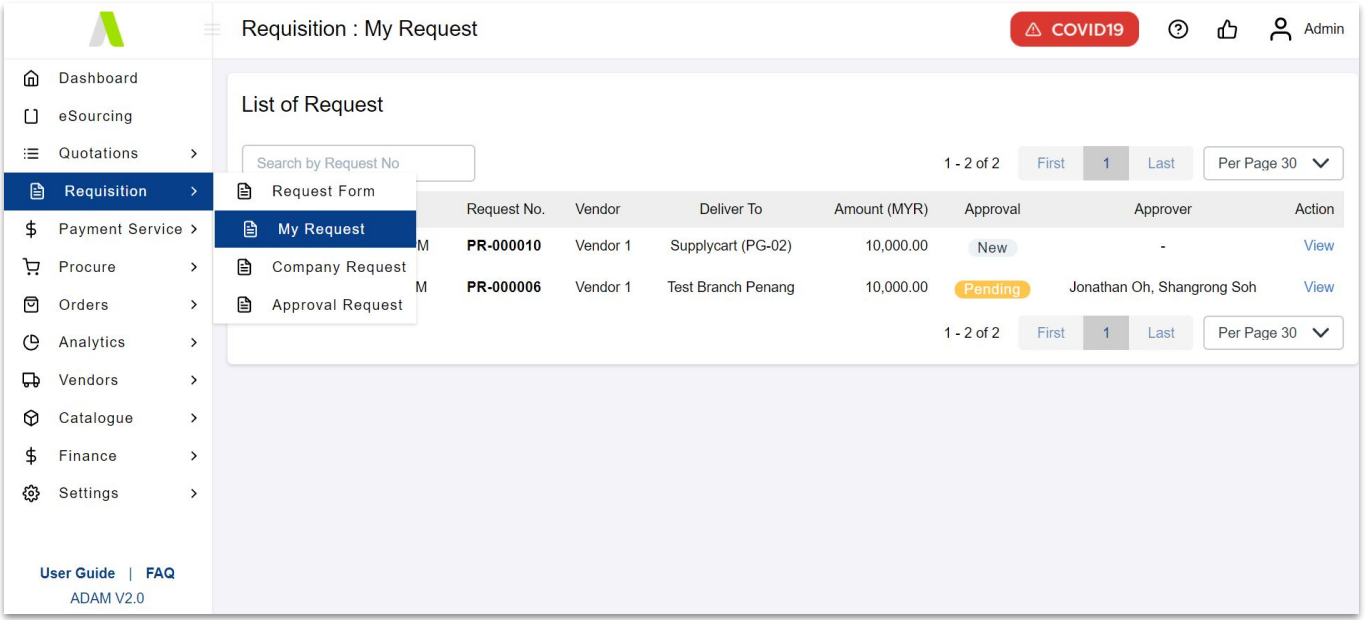
Requisition

Page purpose:

Create and View Purchase Requisitions

Features:

1. Generate a Purchase Requisition
2. View previous Purchase Requisitions



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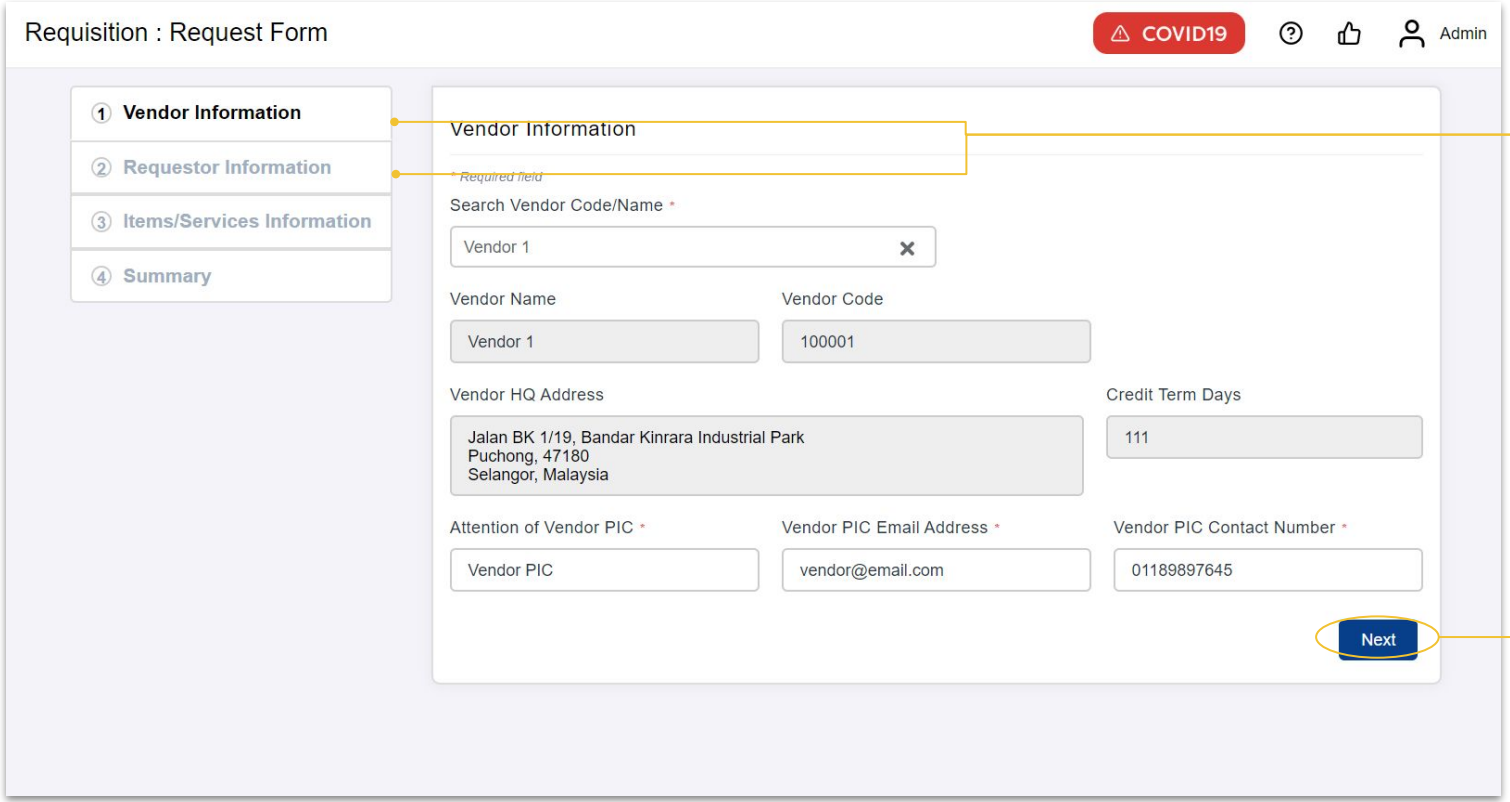
Requisition - Request Form : Creating a Requisition



Fill up all necessary information according to your company's policy

Cick **Next** to move to the next section of the Request Form

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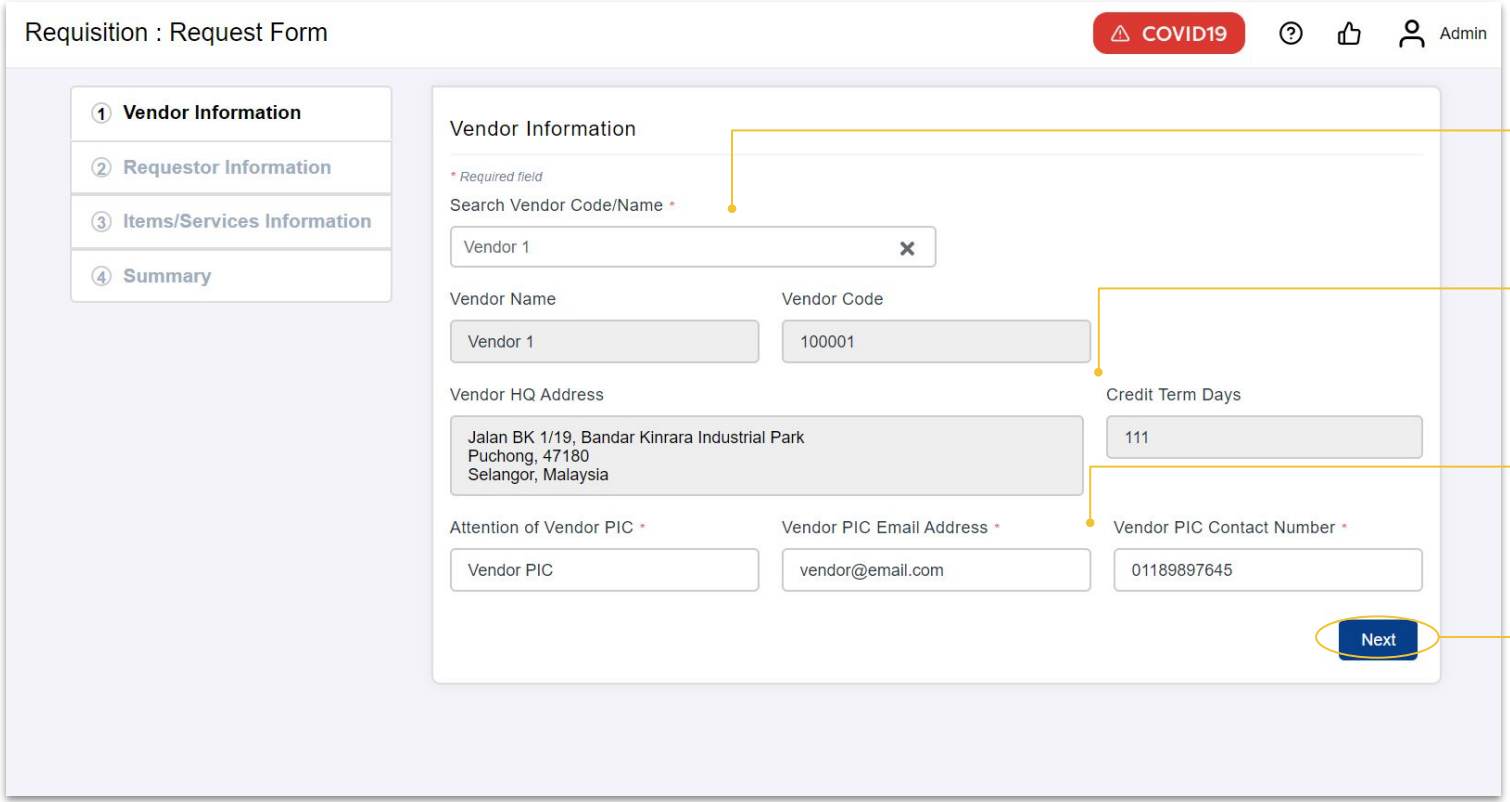
Requisition - Request Form : Vendor Information



Search/Select the **Vendor Name**

These sections are auto-filled based on the Vendor selected

Input details of preferred **Person In-charge** for the Vendor

Click **Next** to move to the next section of the Request Form

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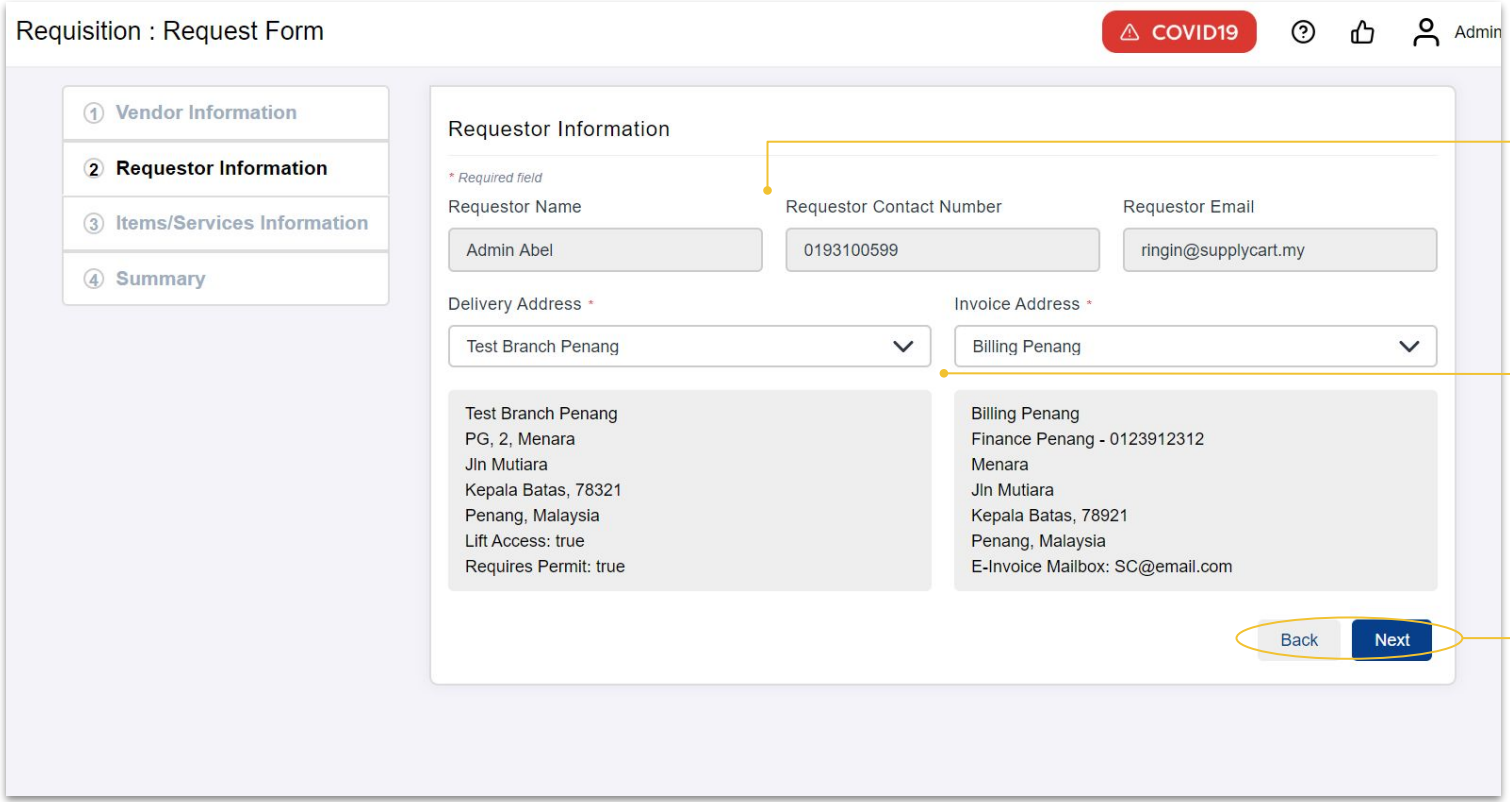
Requisition - Request Form : Requestor Information



These sections are auto-filled based on the Requestor's account information

Select the **Delivery & Billing Address**

Click on **Next** to move on to the next section or **Back** to return to the previous section

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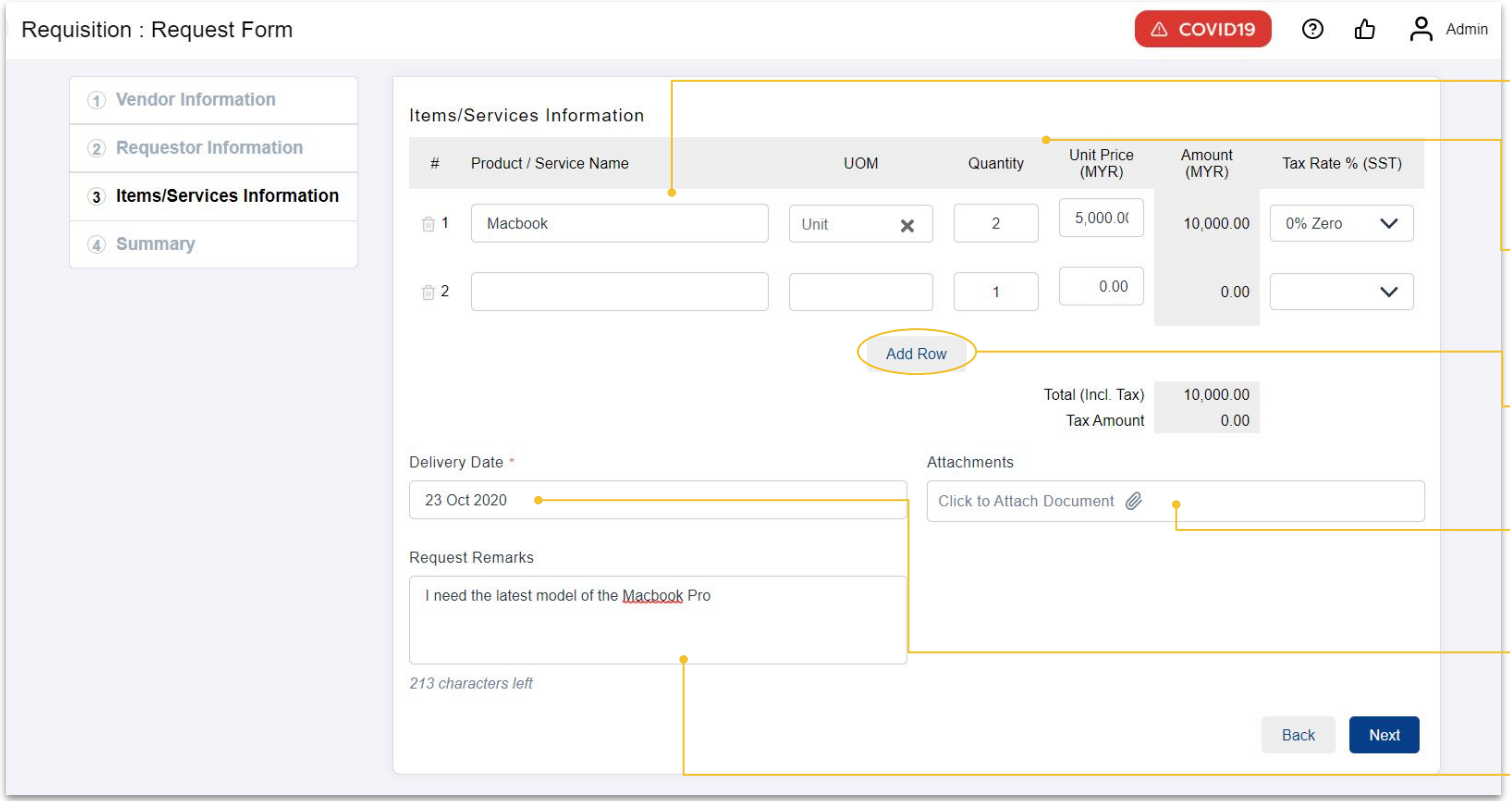
Requisition - Request Form : Items/Services Information



Insert the **Product/Service Name** that you are requesting

Input the required information in all fields for the product/service being requested

Click on **Add Row** to add another item/service

Add any relevant **Attachment**

Input your expected **Delivery Date** for this request

Input any **Request Remarks** here

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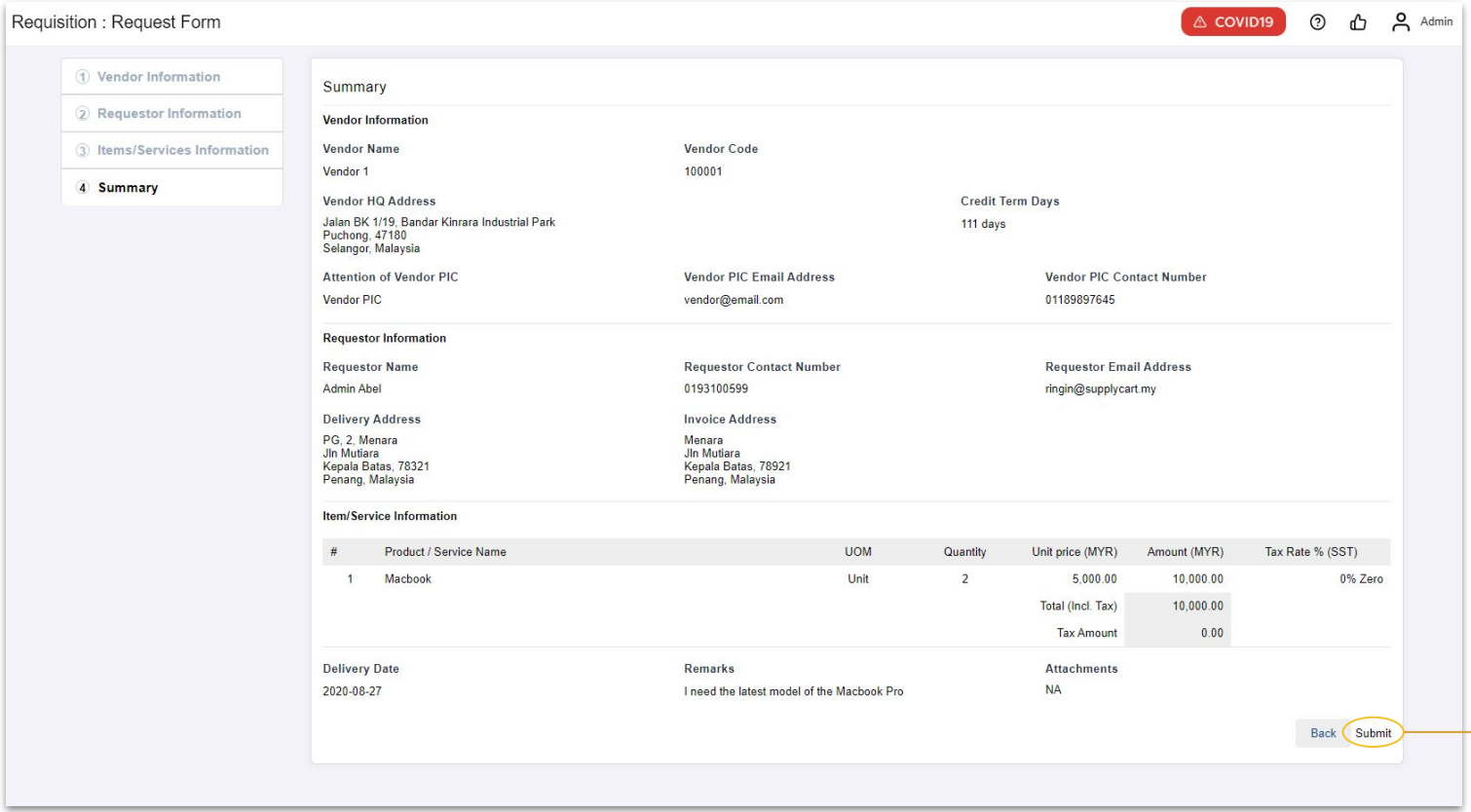
Requisition - Request Form : Summary & Submission



This section shows the **Summary** of your Purchase Request Form

Once you have confirmed all the details are accurate, click on **Submit**

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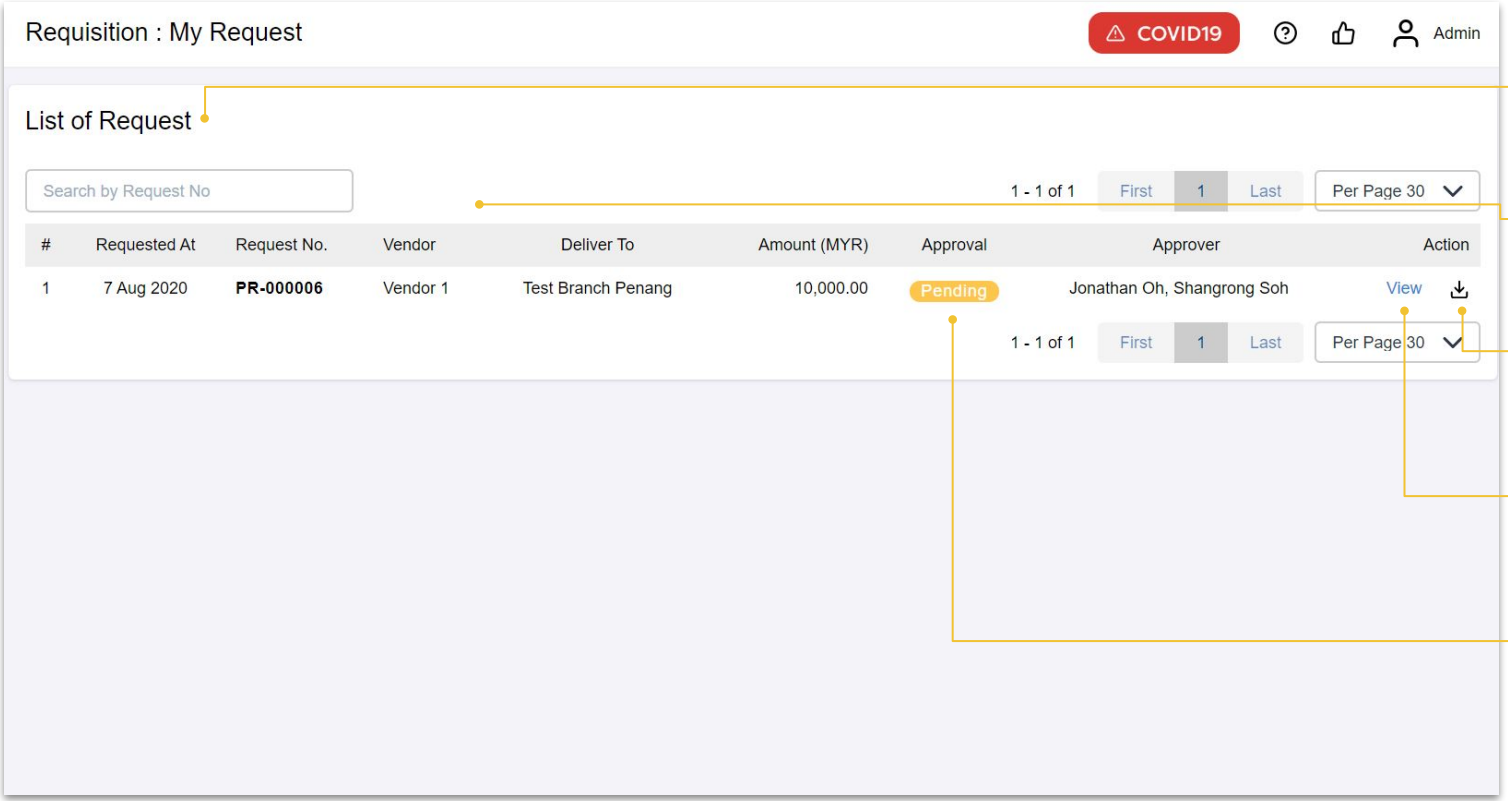
Requisition - My Requests



View the list of Purchase Requests made by you

Details of each Purchase Request

Click this icon to download a copy of the Purchase Request

Click to **View** the selected Purchase Request

The **Approval** status of the selected Purchase Request

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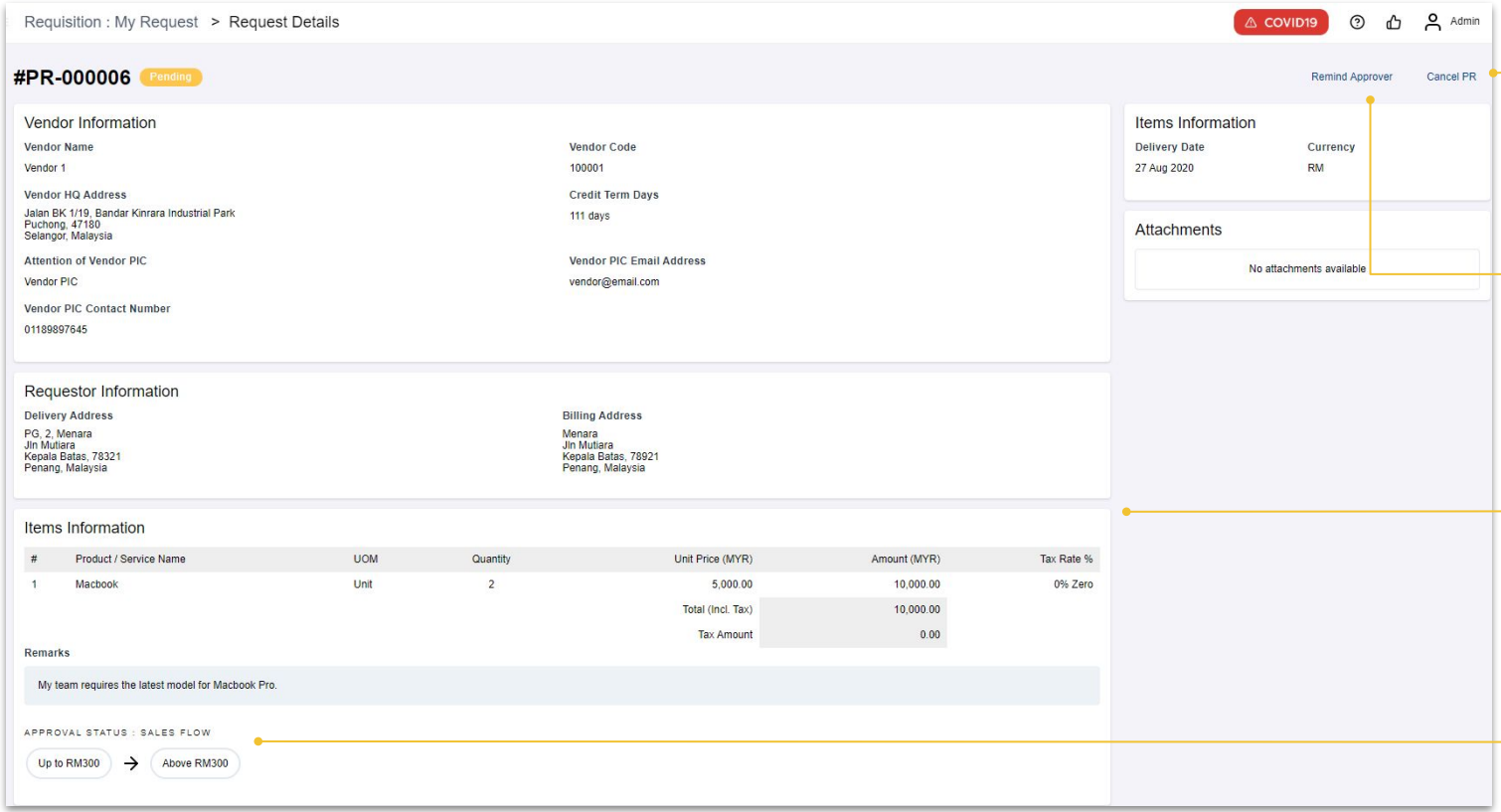
Requisition - My Request : Request Details



Click to **Cancel** the Purchase Request

Click to send a **Reminder** to the Approver

The Approver will receive a reminder to approve the request

This section shows the **details** of your Purchase Request

Click on a flow to see the list of Approvers for the selected flow

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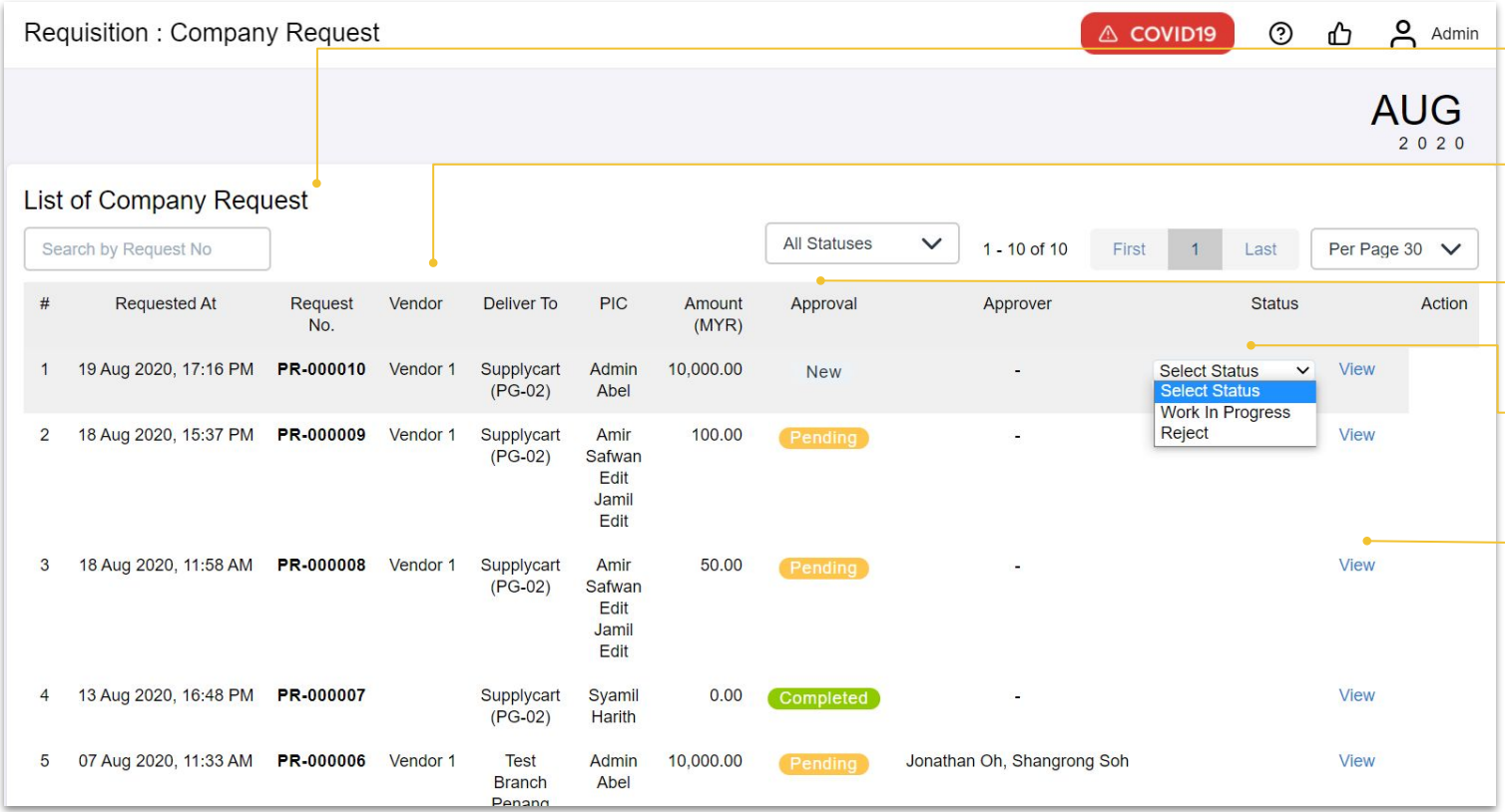
Requisition - Company Request



View the **List of Company Request**

Details of each Request

Approval status of selected Request

Change the **Status** of the request from the dropdown menu

Click to view selected Request

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