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Admin Guide

ADAM

Analyse . Digitalise . Automate . Manage

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Getting Started

ADAM

Analyse . Digitalise . Automate . Manage

Company Profile

Settings - Company Profile

Side-menu:

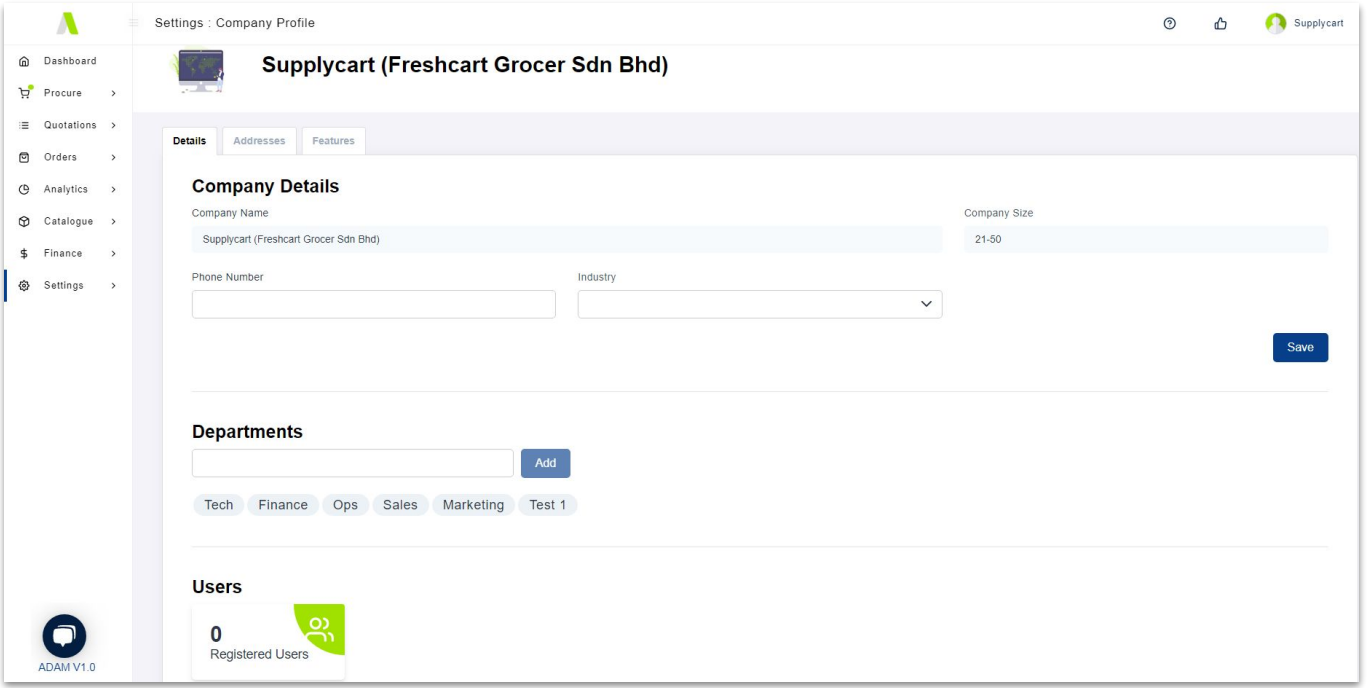
Settings > Company Profile

Page purpose:

Update or maintain any relevant Company Information

Features:

1. Maintain User and Company Details
2. Create all Delivery addresses for every branch
3. Create all Billing addresses for invoicing



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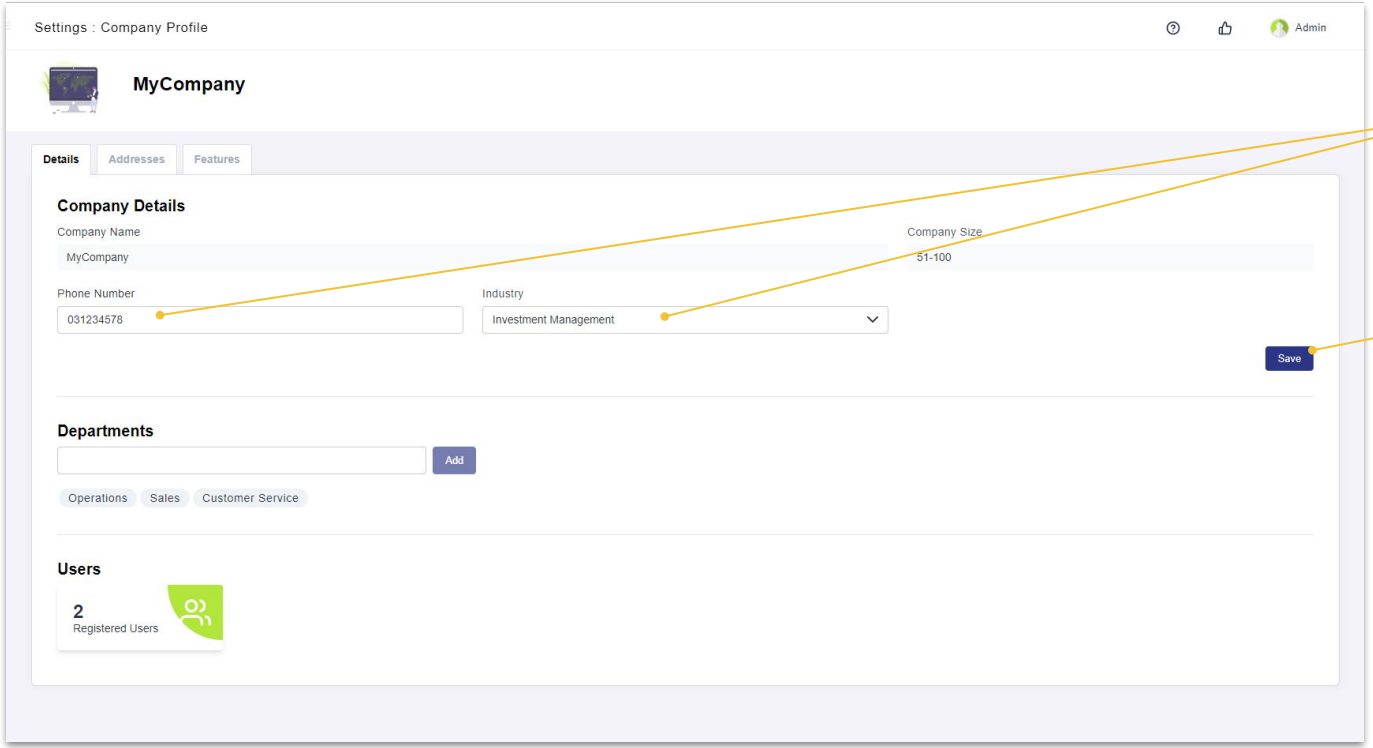
Settings - Company Profile - Company Details



Update your company's phone number and industry

Save any changes made by clicking on the 'Save' button

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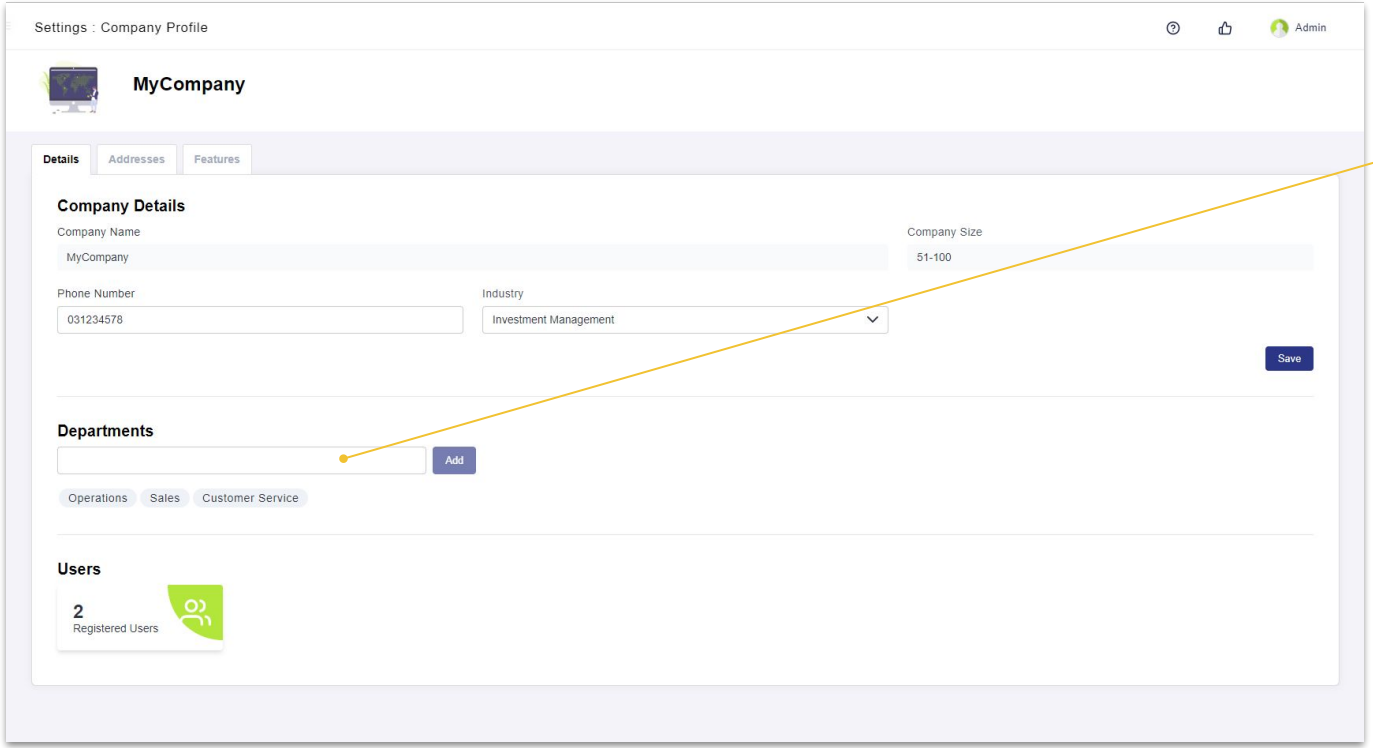
Settings - Company Profile - Adding Departments



Add departments by keying in the department name, and clicking on the ‘Add’ button

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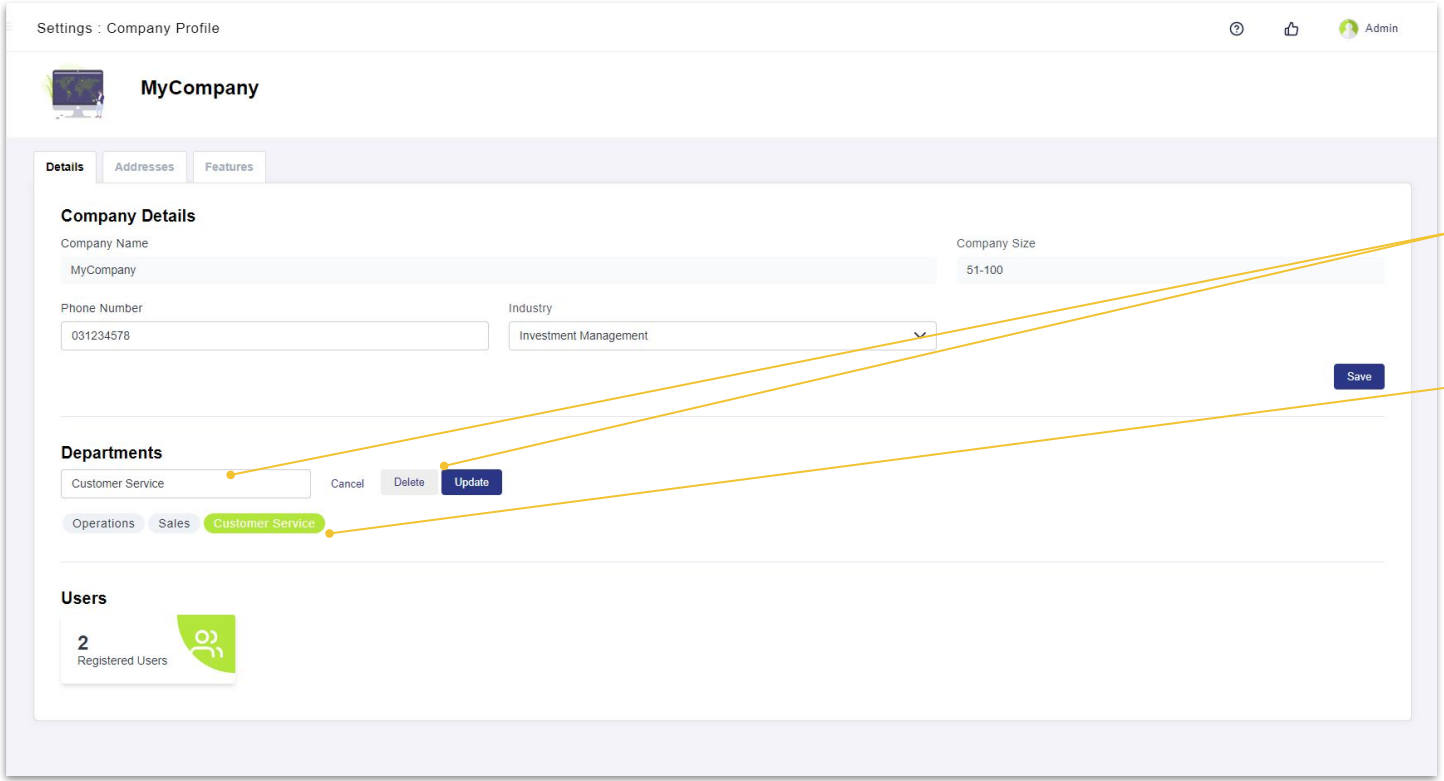
Settings - Company Profile - Maintaining Departments



Amend or delete the Department name

Select the Department to be maintained

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Settings - Company Profile - Addresses

Side-menu:

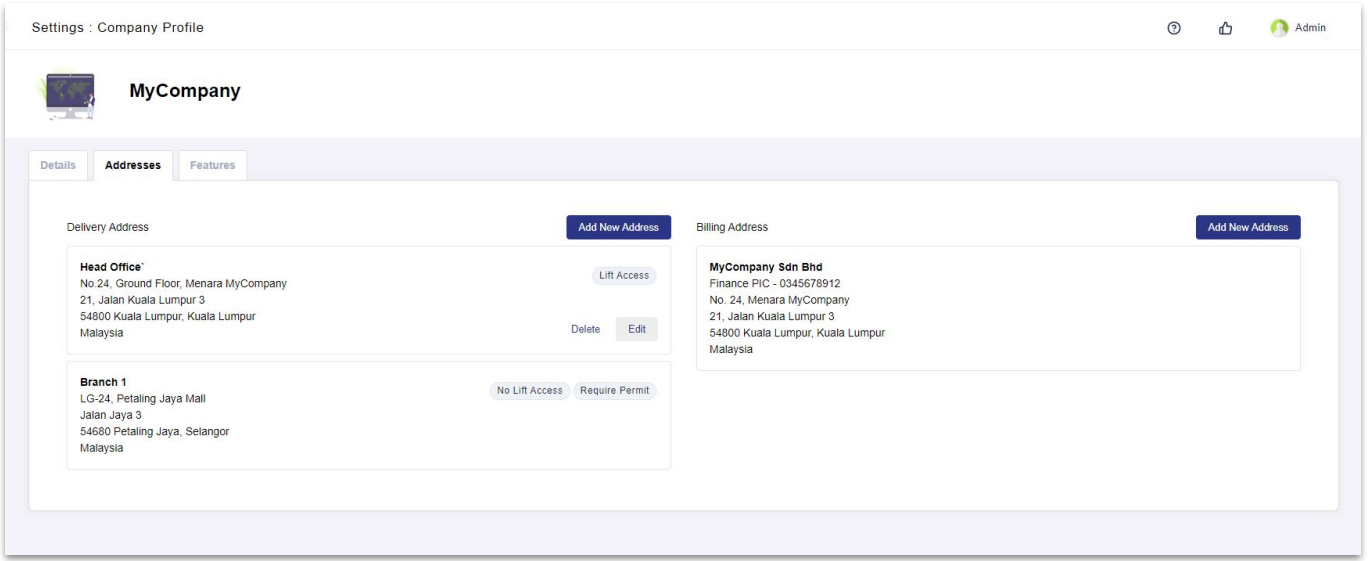
Settings > Company Profile > Addresses

Page purpose:

Add, delete, and update billing and delivery addresses

Features:

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



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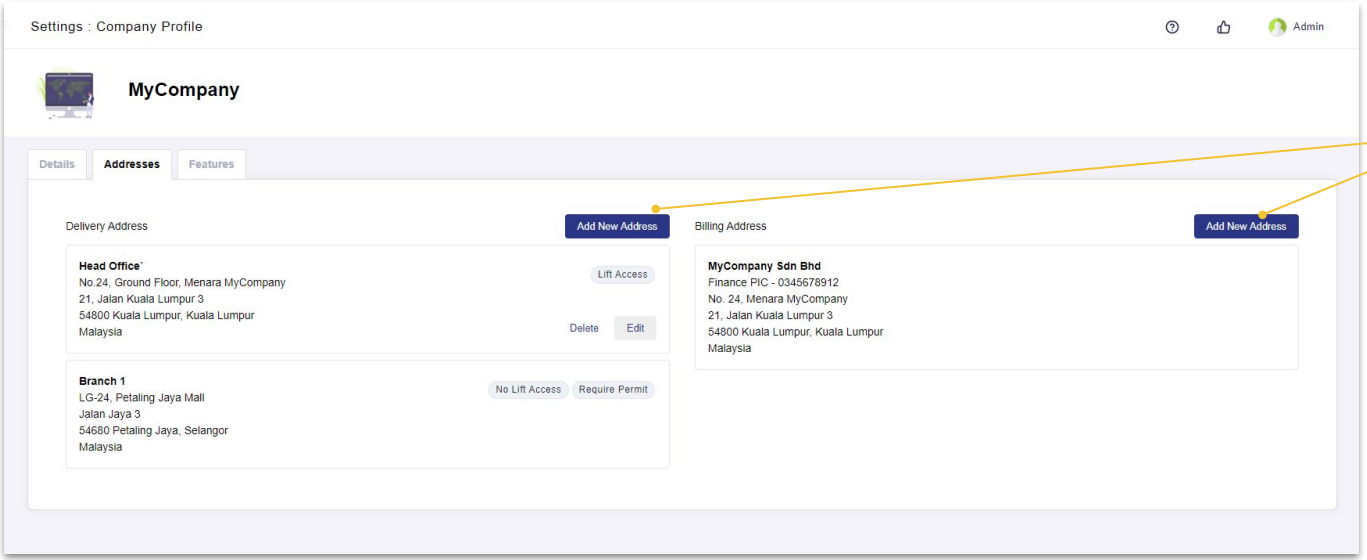
Settings - Company Profile - Addresses - Adding Addresses



Click on the 'Add New Address' buttons to add a new Delivery or Billing Address

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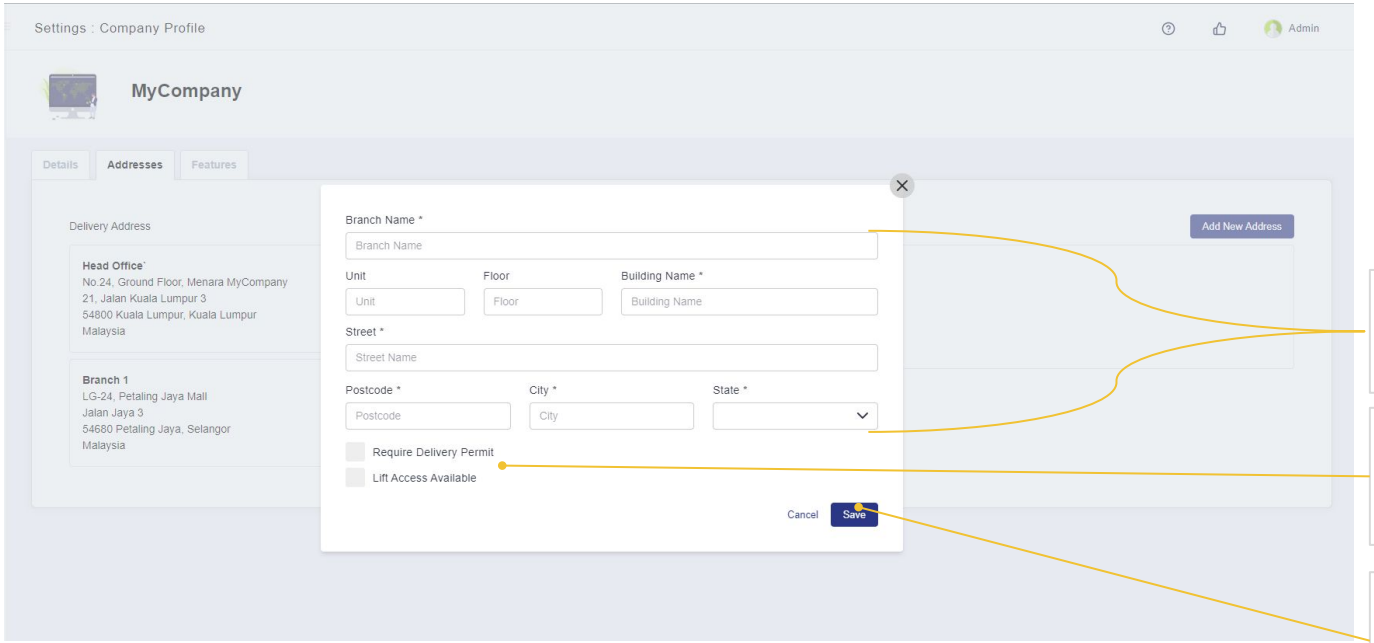
Settings - Company Profile - Adding Delivery Addresses



Key in the relevant delivery details

Tick if the location requires a delivery permit or has lift access

Click on the ‘Save’ button to add a new address

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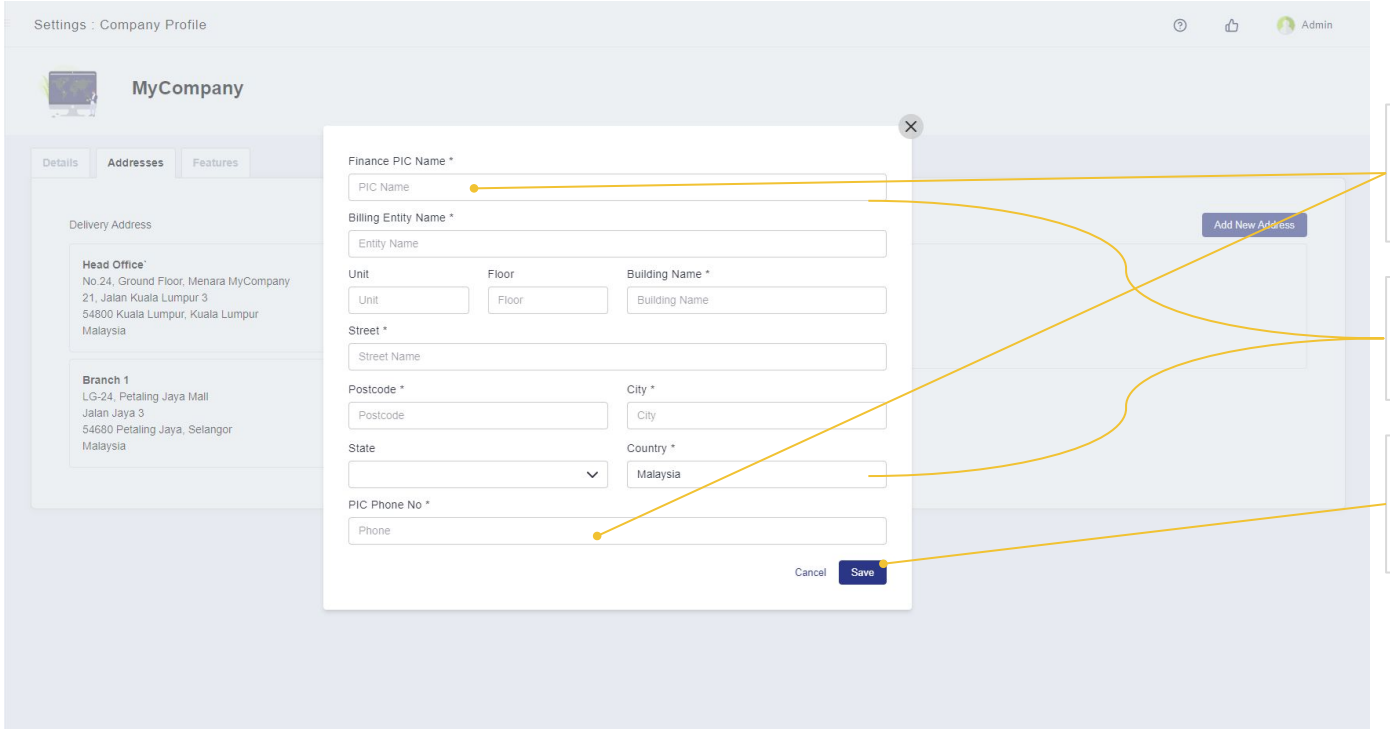
Settings - Company Profile - Adding Billing Addresses



Key in your Finance PIC's Name and Contact Number

Key in the relevant billing details

Click on the 'Save' button to add a new address

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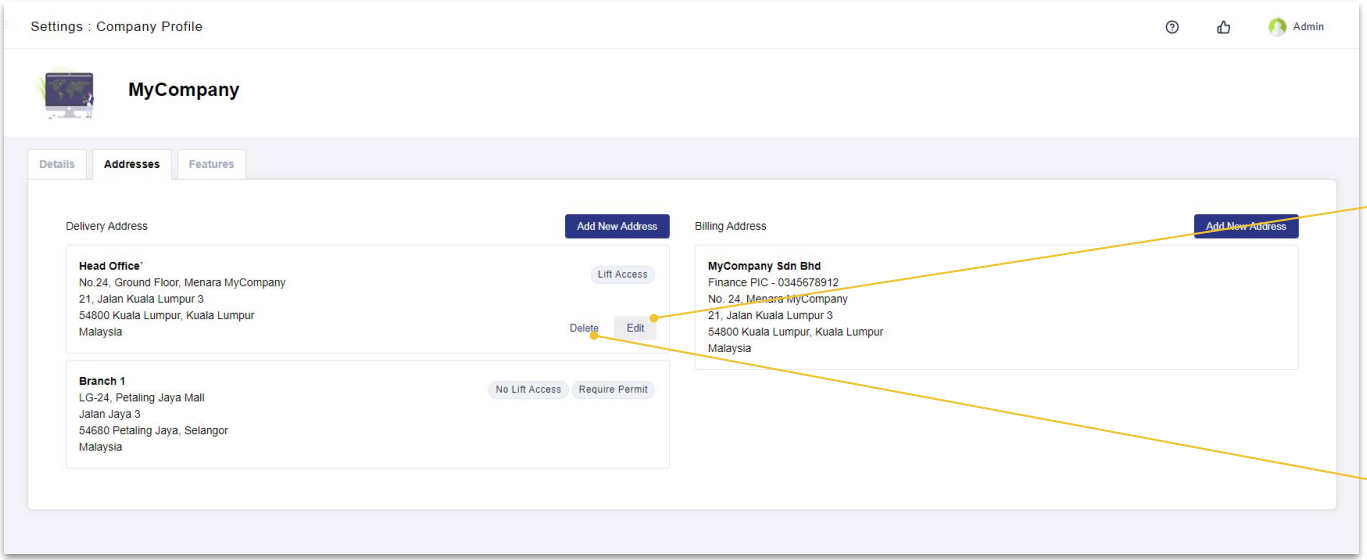
Settings - Company Profile - Addresses - Maintaining & Deleting



Click on the 'Edit' button to edit the address

Click on the 'Delete' to delete the address

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Settings - Company Profile - Features

Side-menu:

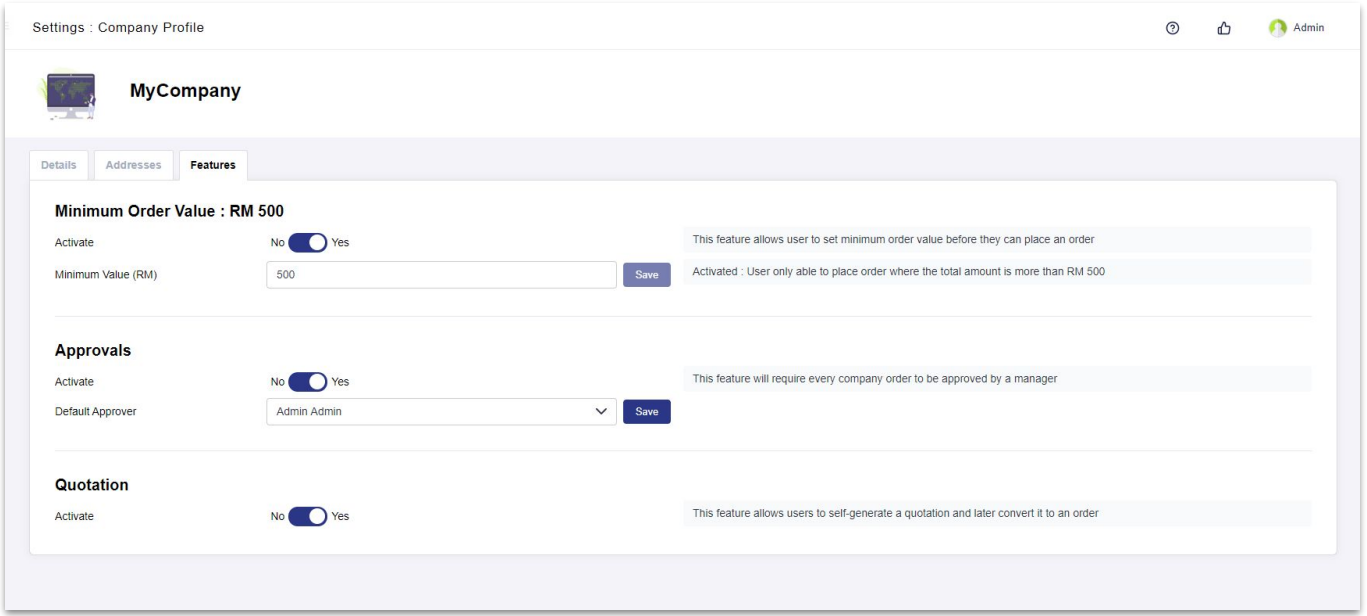
Settings > Company Profile > Features

Page purpose:

Activate or deactivate User Features in ADAM

Features:

1. Activate and set a Minimum Order Value
2. Activate and set a default Approver
3. Quotations



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User Management

Settings - User management (Introduction)

Side-menu:

Settings > Users

Or

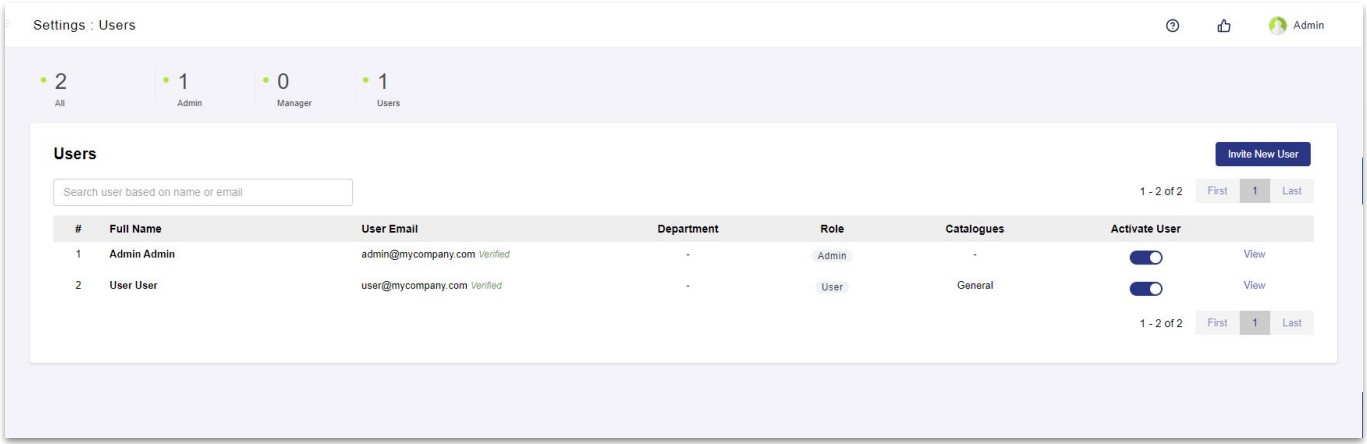
Settings > Company Profile > Users

Page purpose:

Update or maintain any relevant User information

Features:

1. Assign user roles
2. Activate/deactivate users
3. Assign user catalogues
4. Assign user departments (if applicable)



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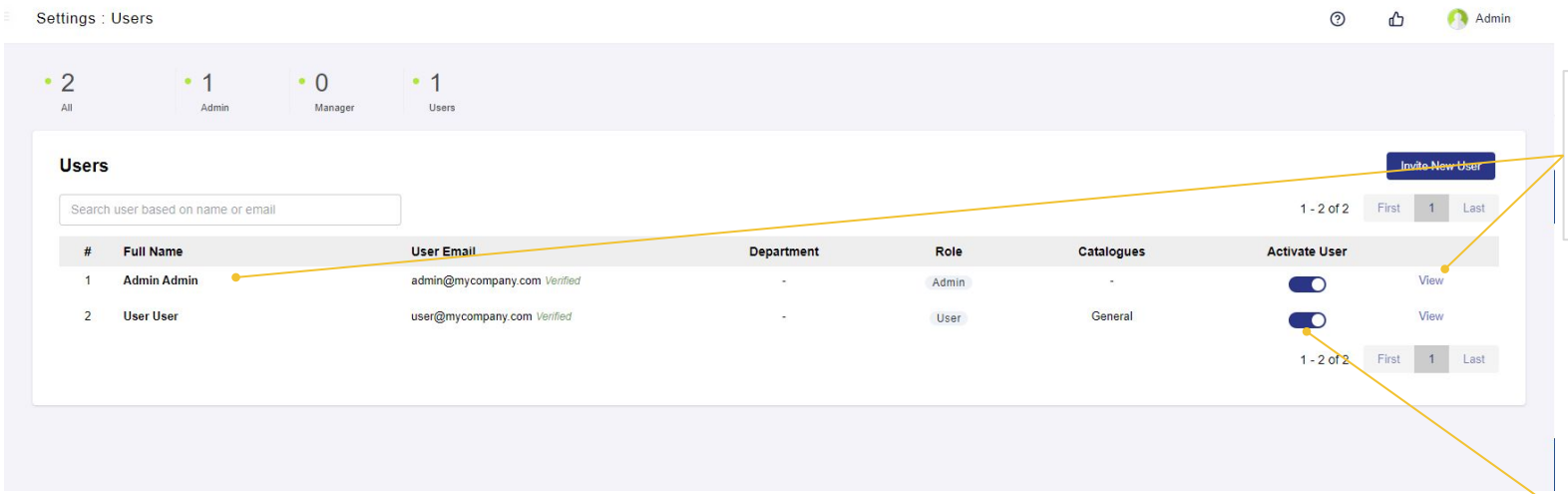
Settings - User management



Click to view the individual user's properties

Activate or Deactivate individuals by toggling the 'Activate User' switch

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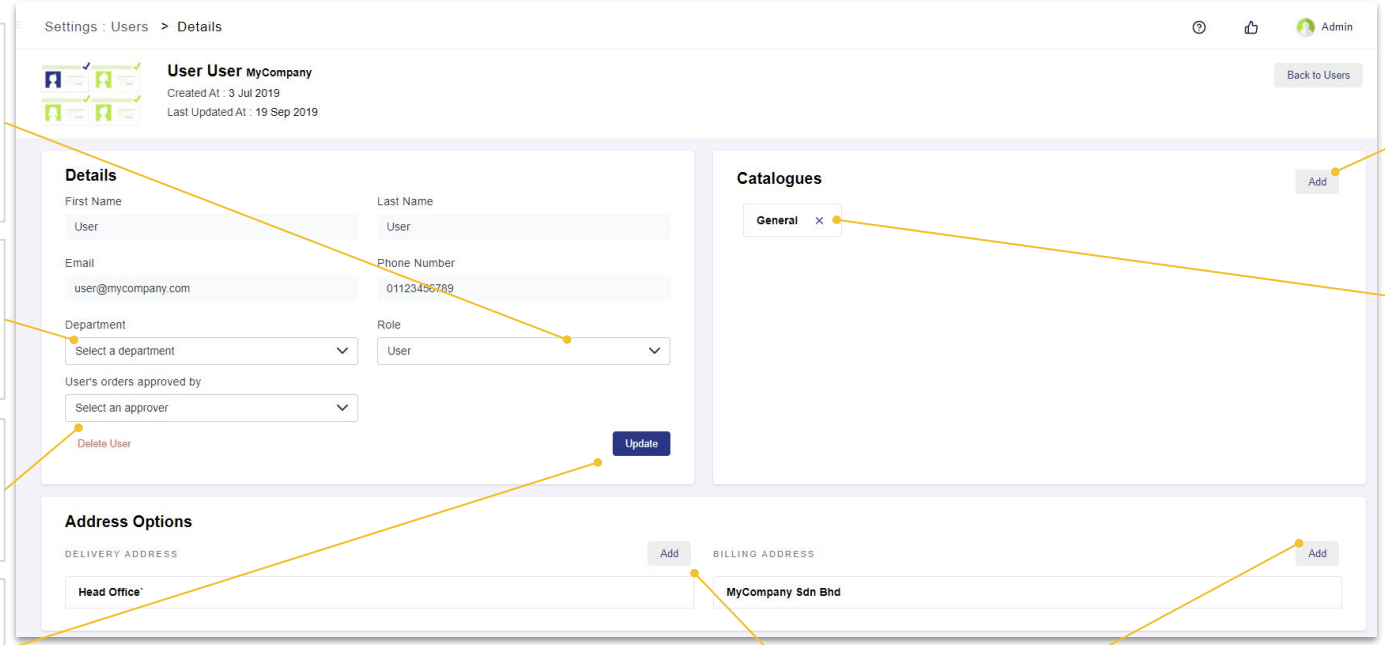
Settings - User management

Select the individual's system role (User or Admin)

Assign the individual to a Department (if applicable)

Assign an approver (if Applicable)

Click to update the user's profile



Assign relevant Catalogues to designated User

Remove access to catalogues from the User

Assign Billing and Delivery Addresses relevant to the individual

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Catalogue Setup

Catalogue - Introduction

Side-menu:

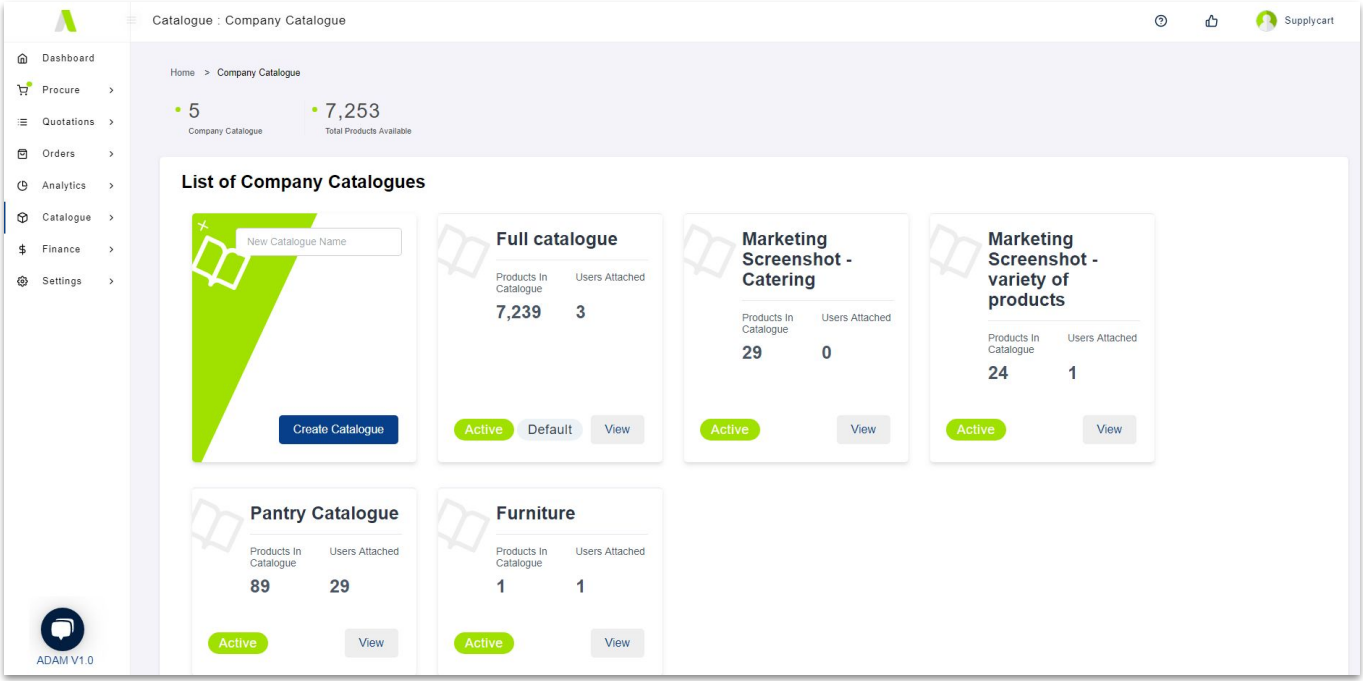
Catalogue > Company Catalogue

Page purpose:

Update and maintain company catalogues

Features:

1. Create new catalogues
2. Activate or deactivate catalogues
3. Assign user to catalogues
4. Assign products to catalogues



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Catalogue setup - Introduction

Side-menu:

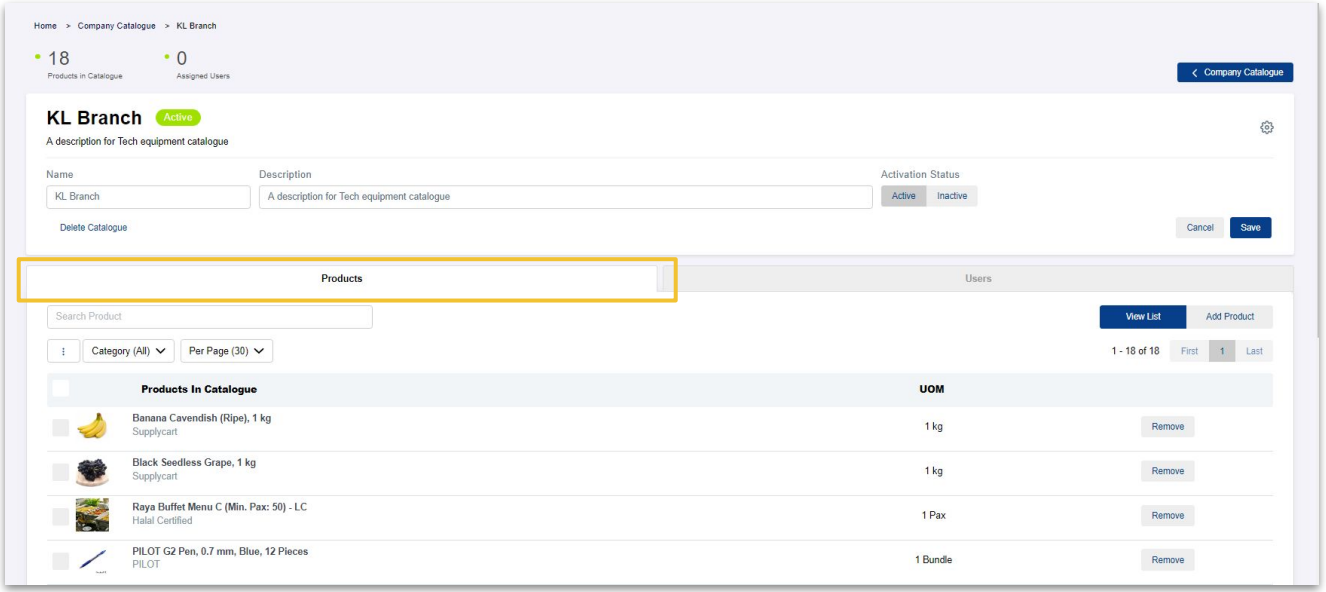
Catalogue > Company Catalogue > Individual Catalogue > Products tab

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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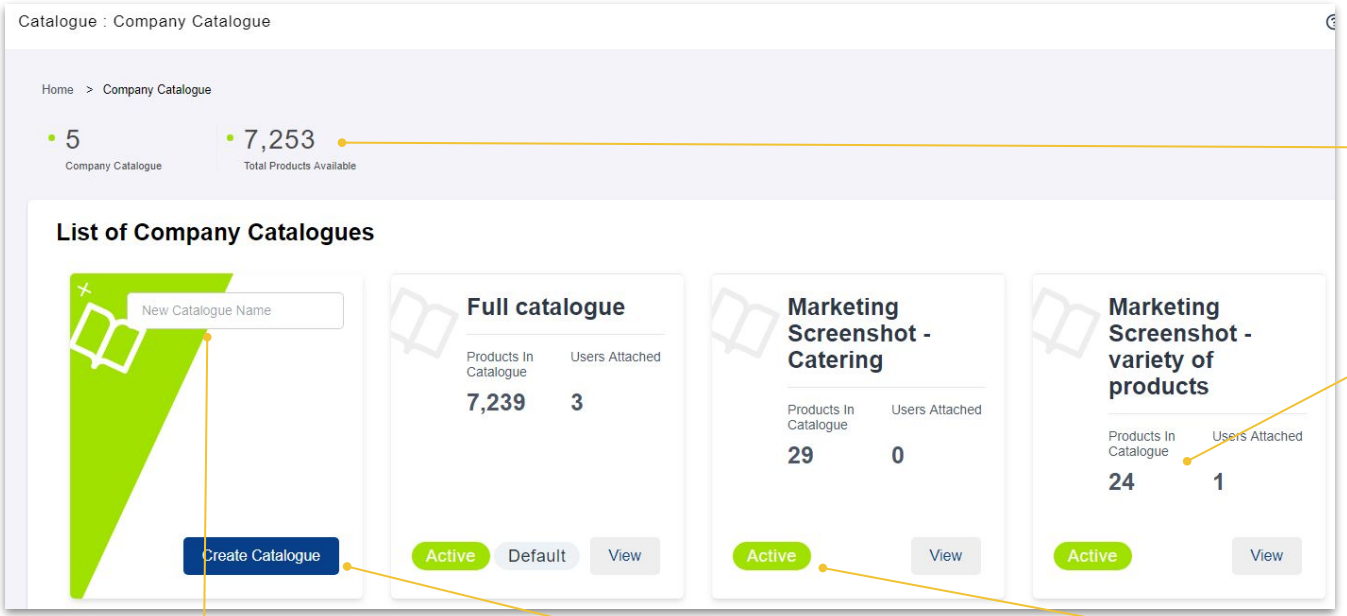
Catalogue - Creating a new catalogue



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

Total number of products and users assigned to this catalogue

Activation status of the Catalogue

Input a name for the new catalogue

Click ‘Create Catalogue’ button to create new catalogue

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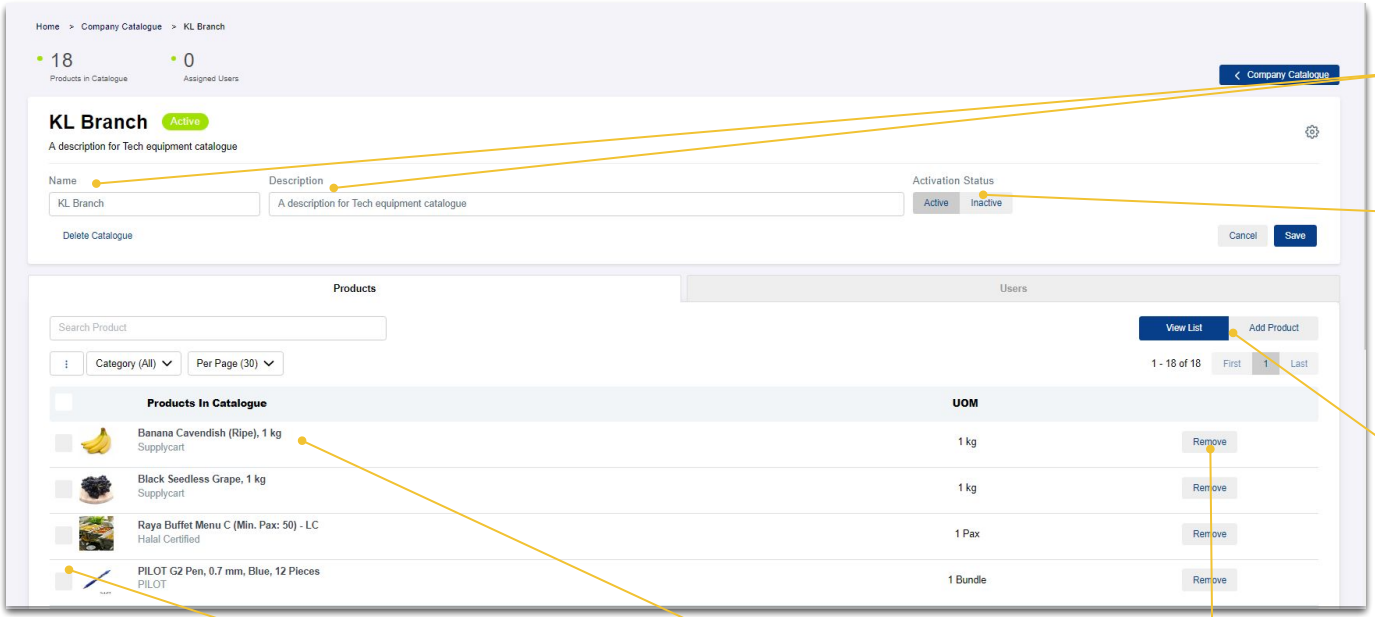
Catalogue setup - Current catalogue



Edit the name and description on each catalogue

Activate or Deactivate the Catalogue

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

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

Select checkbox to execute bulk action on selected products

Click to view more product details

Click 'Remove' to remove this product from the catalogue

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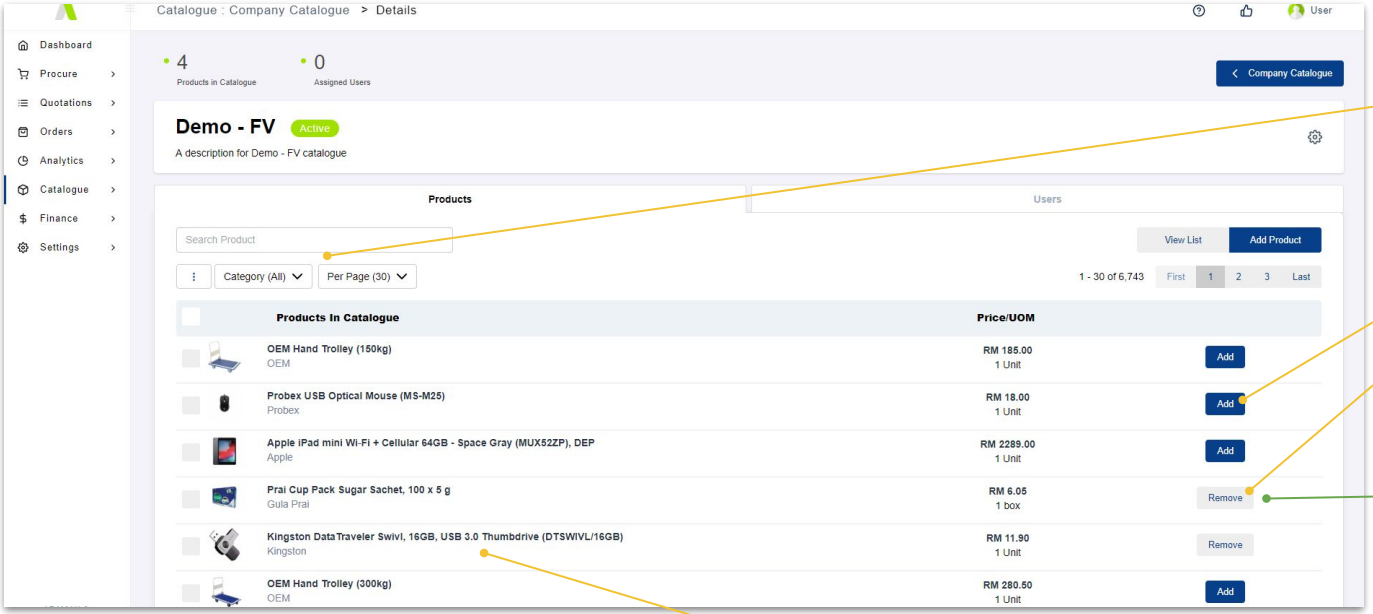
Catalogue setup - Add new products into current catalogue



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

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

This product is in the catalogue

Click to view product details

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Catalogue setup - Overview of users

Side-menu:

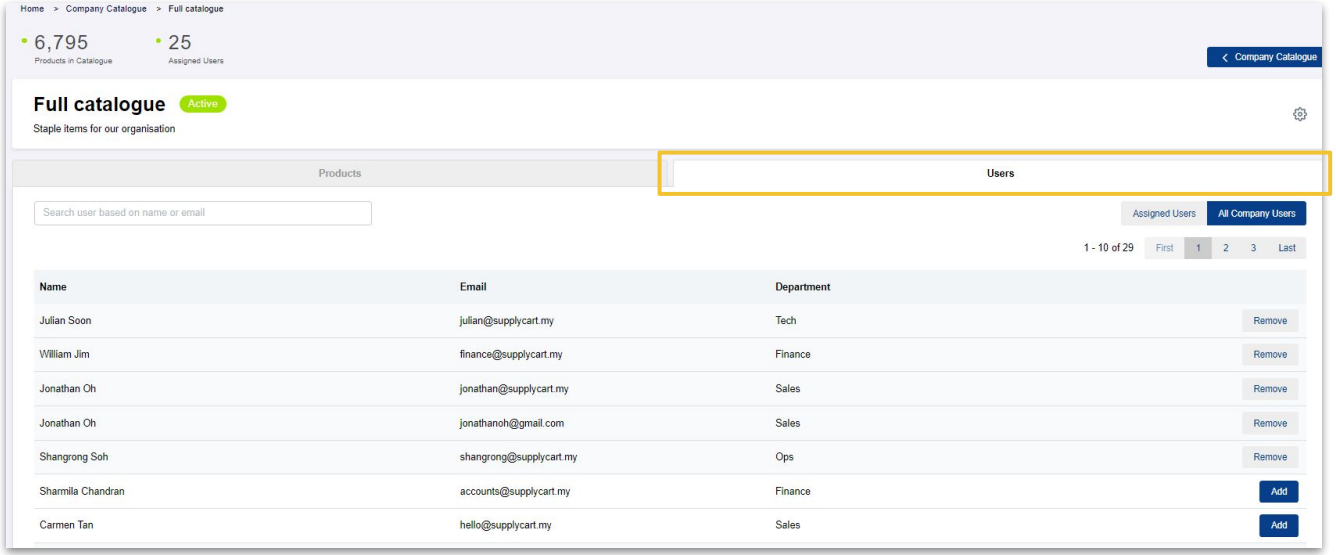
Catalogue > Company Catalogue > Individual Catalogue > Users tab

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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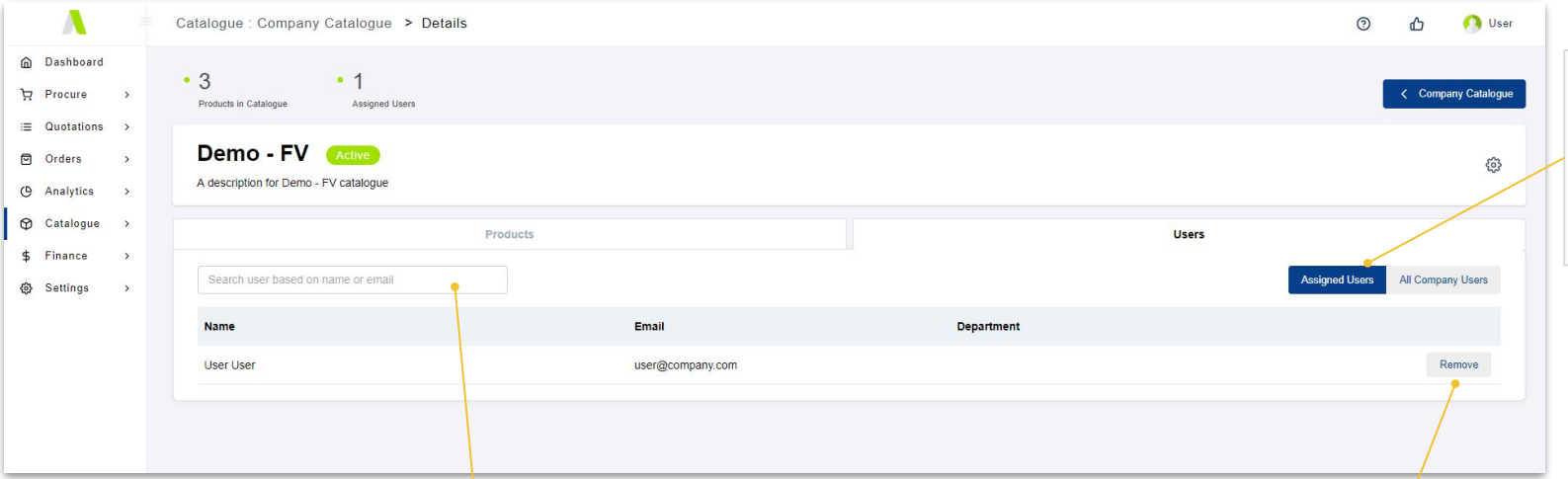
Catalogue setup - Assigned users



Displays current users that are assigned to this catalogue

Search for an individual user

Remove users by clicking on the 'Remove' button

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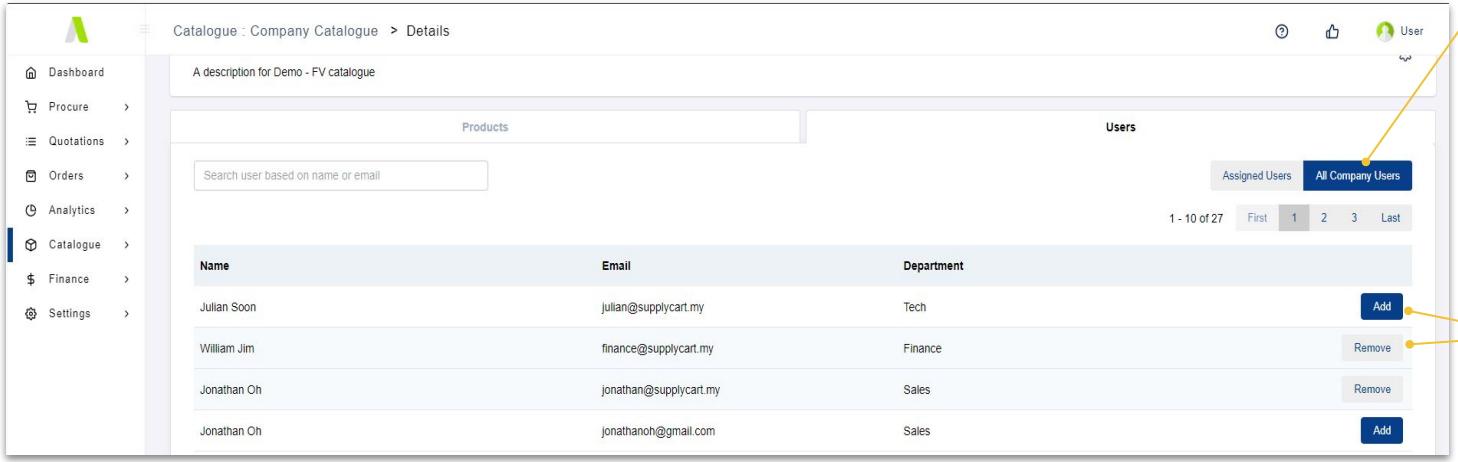
Catalogue setup - Assigning new users



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

Add or remove users by clicking on the 'Add' or 'Remove' button

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Catalogue pricing

Catalogue pricing - Introduction

Side-menu:

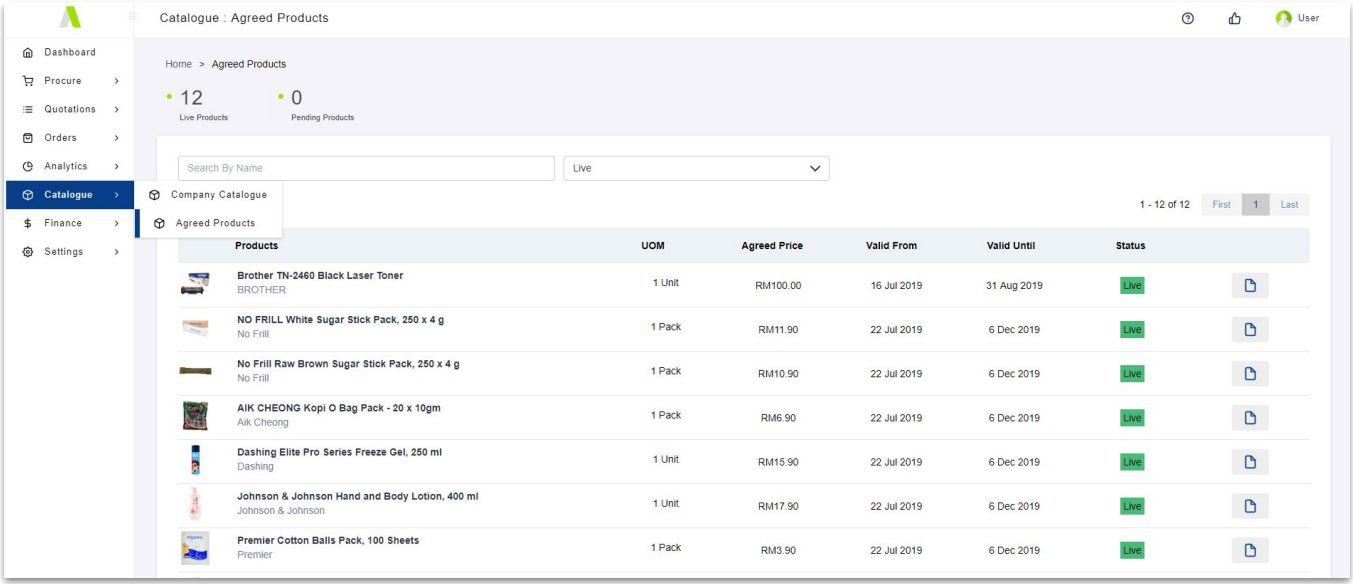
Catalogue > Agreed Products

Page purpose:

View products that have agreed contract pricing setup, their current validity period and status

Features:

1. List of products with agreed contract pricing



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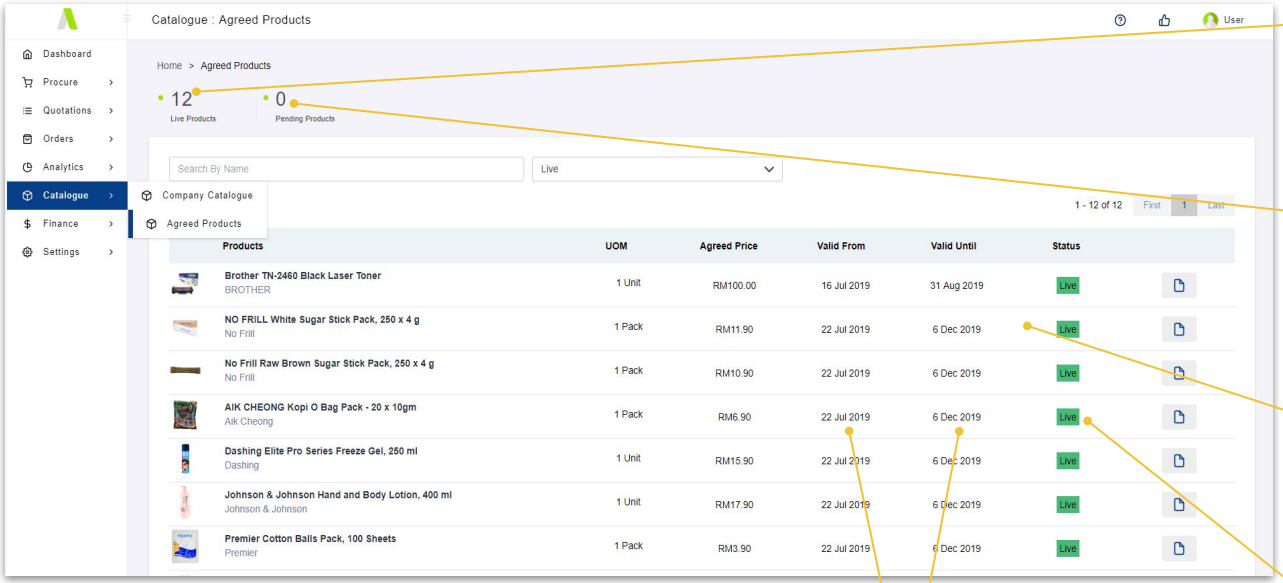
Catalogue pricing - List of agreed products prices



Total number of products with LIVE Agreed Contract Pricing

Total number of products with Agreed Contract Pricing that are not active yet (i.e. valid in the future)

Current agreement status of the item

Attached documentation confirming price agreement (future feature)

Validity period of the Agreed Price

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Finance - PO Policy

Finance - PO Settings - Overview

Side-menu:

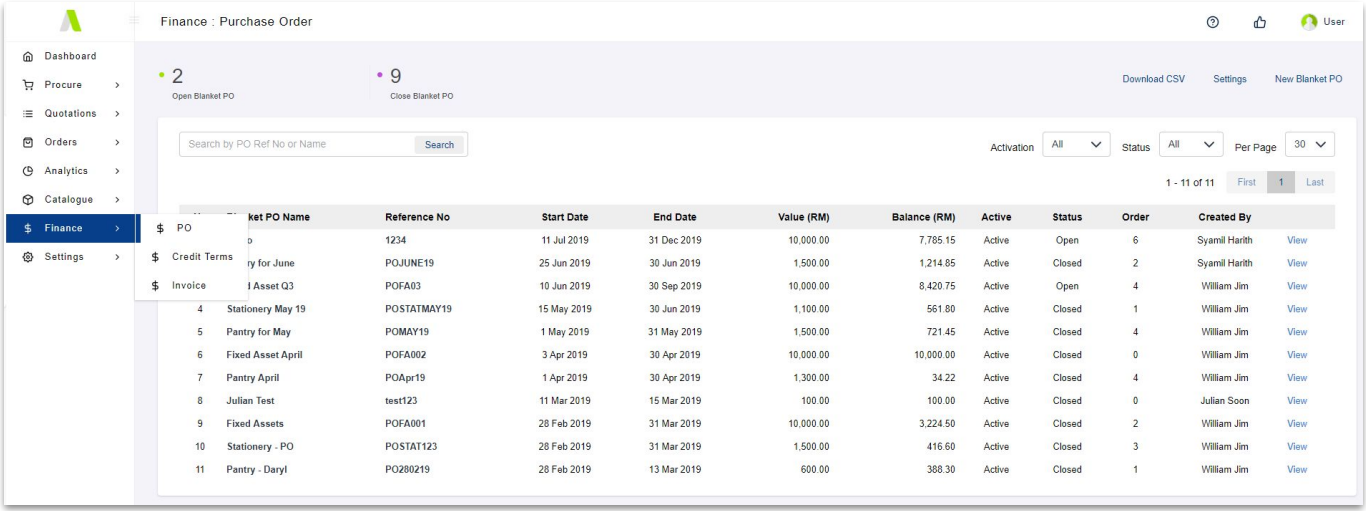
Finance > PO

Page purpose:

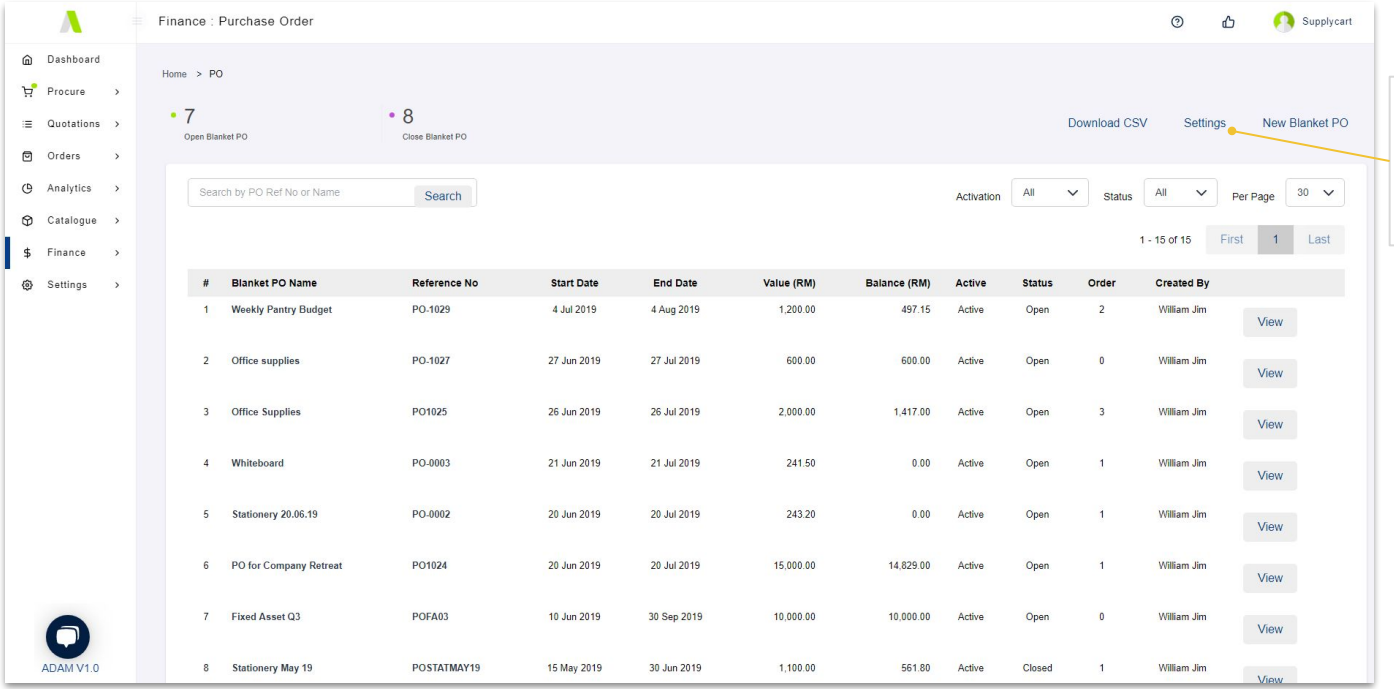
Setup the company's PO policy setting and monitor Blanket POs

Features:

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



Finance - PO Settings - Company PO policy setup (overview)



Click on ‘Settings’ to begin setup based on your company’s PO policy

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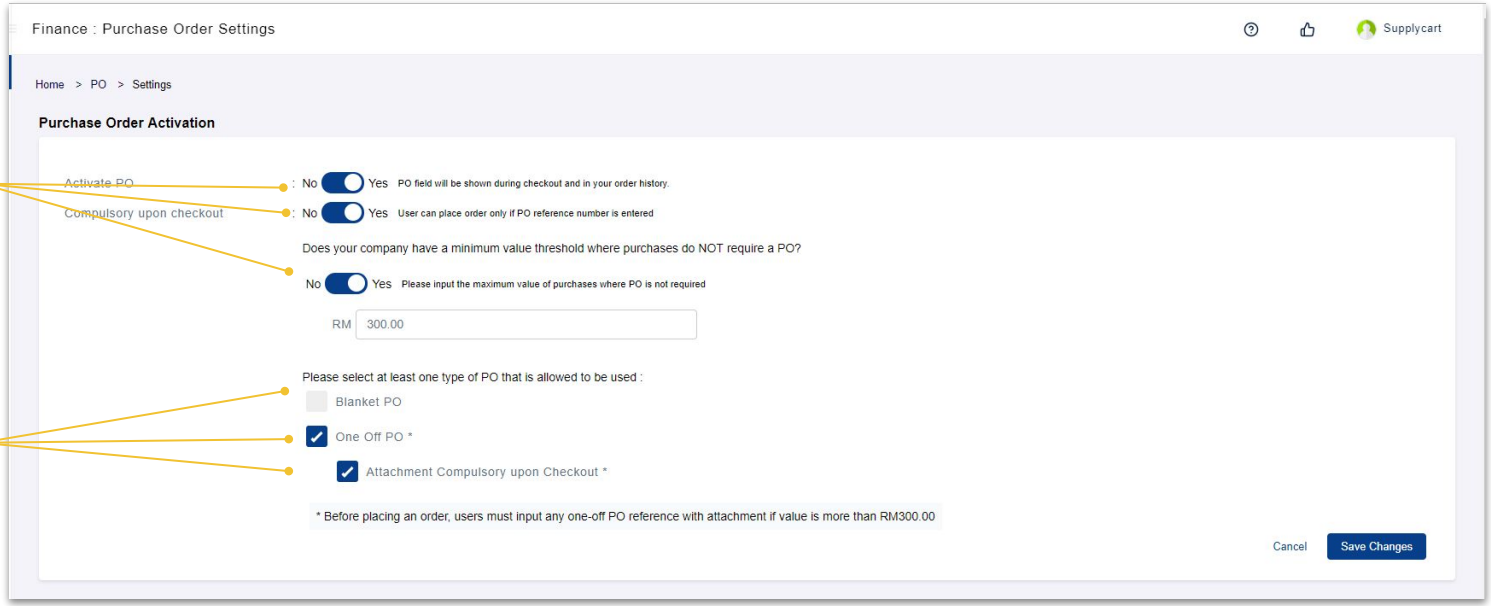
Finance - PO Settings - Company PO policy setup

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

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



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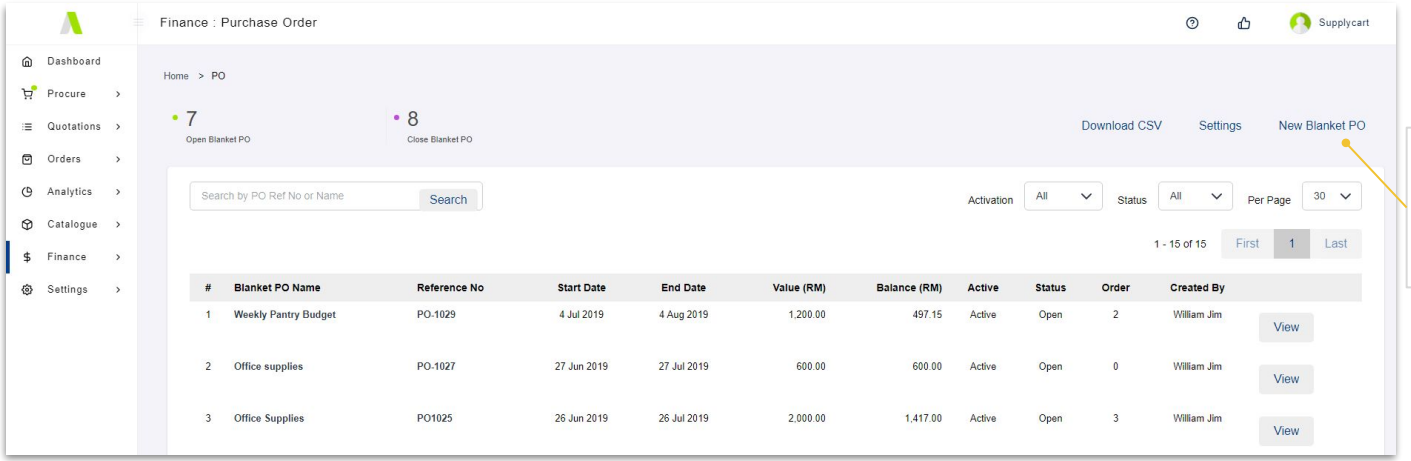
Finance - PO Settings - Create new blanket PO (overview)



Click to create new blanket POs

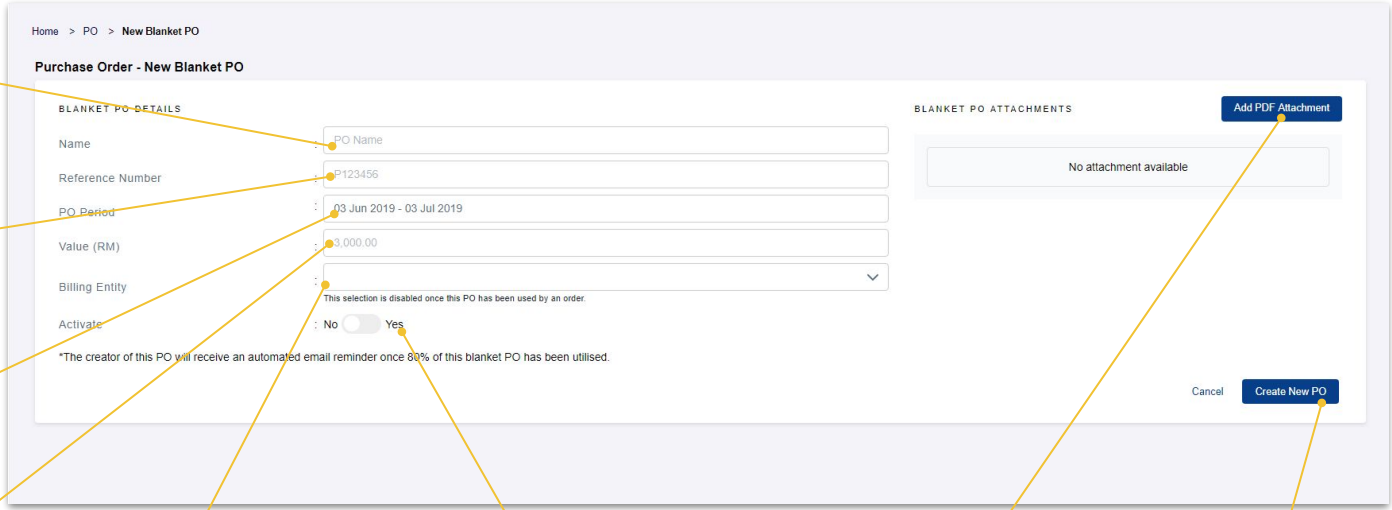
Finance - PO Settings - Create new blanket PO

Input Blanket PO name (can be anything which suits the administrator)

Reference ID (this must be an exact match when placing the order)

Duration of blanket PO validity

Blanket PO amount which can be spent



Select Billing Entity for this Blanket PO

Toggle slider to activate/deactivate this PO

Click to attach PDF of the PO

Click to create Blanket PO

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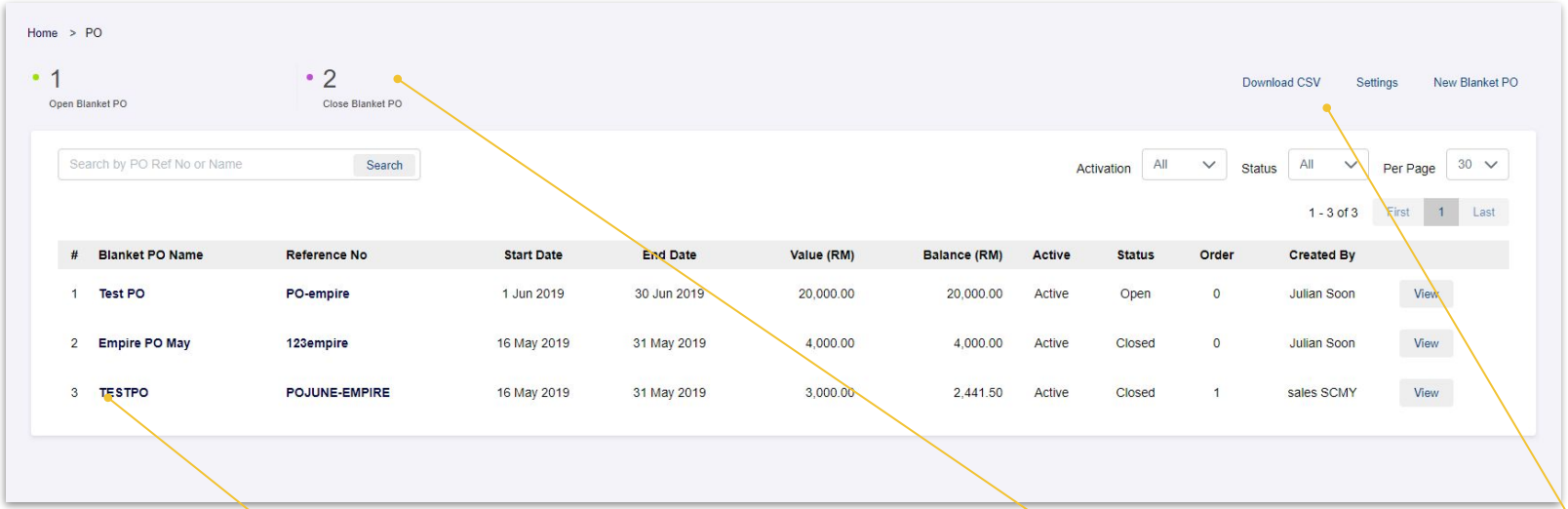
Finance - PO Settings - Monitor blanket POs



Click ‘PO Name’ to see details of the Blanket PO

View the total number of Blanket POs that are Open or Closed on ADAM

Click ‘Download CSV’ to download the entire blanket PO table as a CSV

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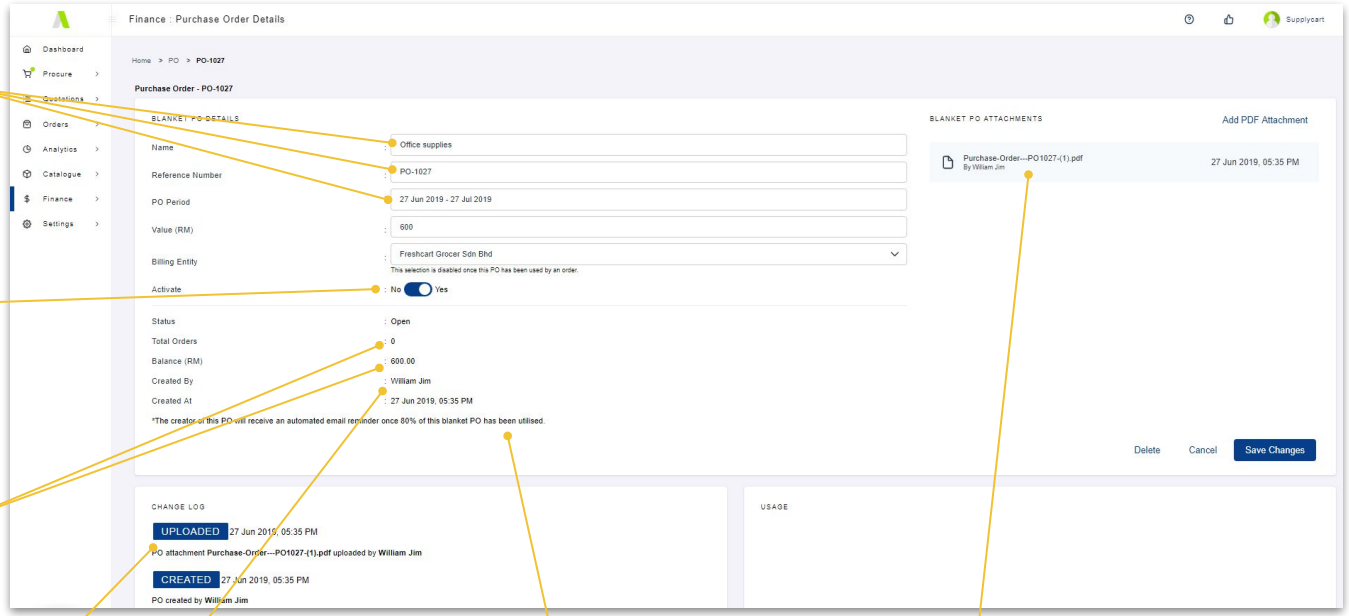
Finance - PO Settings - Existing blanket POs

Update the Name, Reference ID, or Validity Period

Activate or deactivate the PO by toggling the slider

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

Any changes made to the PO will be updated in the Change Log



Indicates who & when this blanket PO was created by

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

Click to view the attached source PO document

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Finance - Credit terms

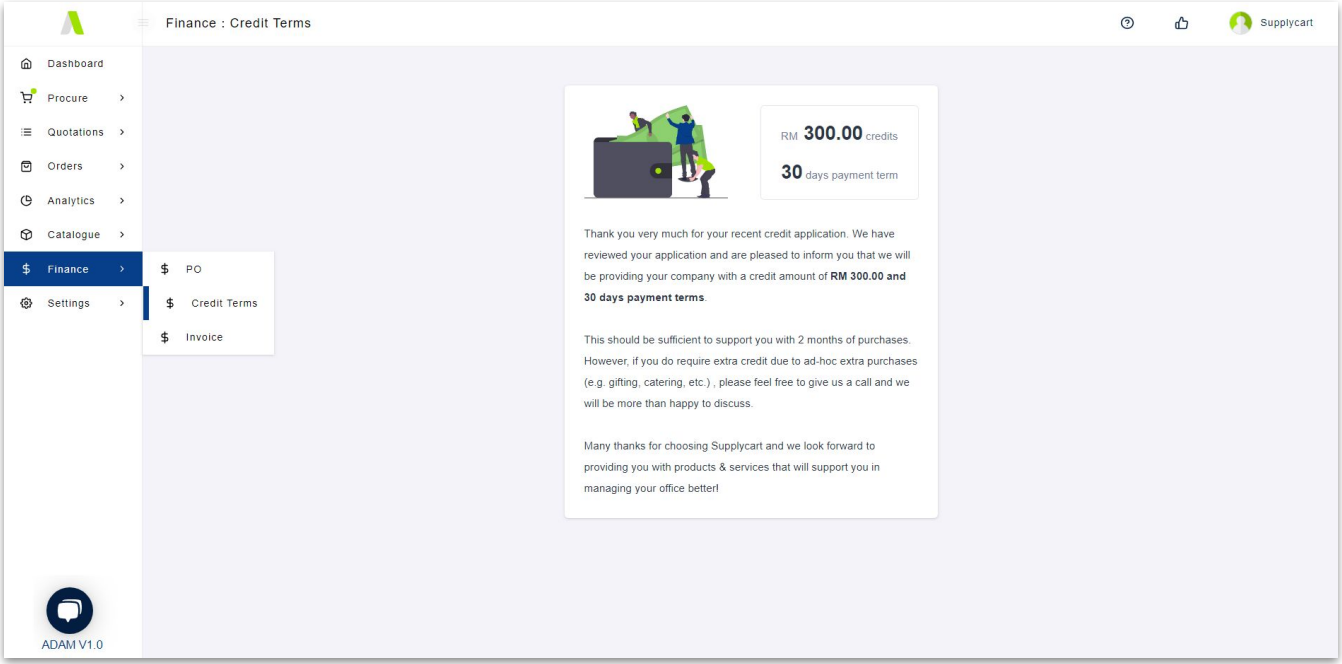
Finance - Credit Terms

Side-menu:

Finance > Credit Terms

Page purpose:

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



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