

The logo for Supplycart.my features a stylized 'S' icon composed of three horizontal bars of varying lengths, followed by the text 'Supplycart.my' in a bold, sans-serif font.

**Supplycart.my**

A large, stylized letter 'A' is centered on the page. The left vertical bar of the 'A' is grey, and the right vertical bar is a vibrant lime green. The top horizontal bar is also grey.

# Admin Guide

**ADAM**

Analyse . Digitalise . Automate . Manage

The logo for Supplycart.my features a stylized 'S' icon composed of three horizontal bars, with the top bar being green and the bottom two being grey. To the right of the icon, the text 'Supplycart.my' is written in a dark blue, sans-serif font.

**Supplycart.my**

A large, stylized letter 'A' is centered in the background. The left vertical stroke is grey, and the right vertical stroke is a vibrant lime green. The top horizontal bar is also grey.

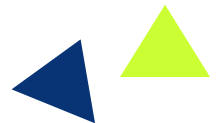
# Getting Started

**ADAM**

Analyse . Digitalise . Automate . Manage



# Company Profile



# Settings - Company Profile

## Side-menu:

Settings > Company Profile

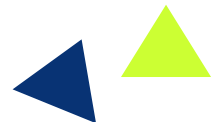
## Page purpose:

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

The screenshot shows the 'Settings : Company Profile' page for 'Supplycart (Freshcart Grocer Sdn Bhd)'. The page is divided into three tabs: 'Details', 'Addresses', and 'Features'. The 'Details' tab is active, showing the 'Company Details' section. This section includes fields for 'Company Name' (filled with 'Supplycart (Freshcart Grocer Sdn Bhd)'), 'Company Size' (filled with '21-50'), 'Phone Number' (empty), and 'Industry' (a dropdown menu). A 'Save' button is located at the bottom right of this section. Below the 'Company Details' section is the 'Departments' section, which has an 'Add' button and a list of existing departments: 'Tech', 'Finance', 'Ops', 'Sales', 'Marketing', and 'Test 1'. At the bottom of the page is the 'Users' section, which shows '0 Registered Users' with a green icon of three people.



# Settings - Company Profile - Company Details

Settings : Company Profile Admin

**MyCompany**

**Details** | Addresses | Features

### Company Details

Company Name: MyCompany Company Size: 51-100

Phone Number: 031234578 Industry: Investment Management

**Departments**

Add

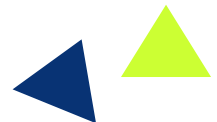
Operations | Sales | Customer Service

**Users**

2 Registered Users

Update your company's phone number and industry

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



# Settings - Company Profile - Adding Departments

Settings : Company Profile Admin

**MyCompany**

Details | Addresses | Features

### Company Details

Company Name: MyCompany Company Size: 51-100

Phone Number: 031234578 Industry: Investment Management

[Save](#)

### Departments

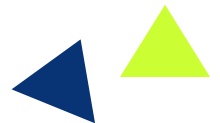
[Add](#)

[Operations](#) [Sales](#) [Customer Service](#)

### Users

2 Registered Users

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



# Settings - Company Profile - Maintaining Departments

Settings : Company Profile Admin

**MyCompany**

**Details** | Addresses | Features

### Company Details

Company Name: MyCompany Company Size: 51-100

Phone Number: 031234578 Industry: Investment Management

Save

### Departments

Customer Service Cancel Delete Update

Operations | Sales | **Customer Service**

### Users

2 Registered Users

Amend or delete the Department name

Select the Department to be maintained





# 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

Settings : Company Profile

MyCompany

Details Addresses Features

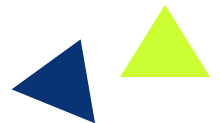
Delivery Address [Add New Address](#)

**Head Office\***  
No. 24, Ground Floor, Menara MyCompany  
21, Jalan Kuala Lumpur 3  
54800 Kuala Lumpur, Kuala Lumpur  
Malaysia [Lift Access](#) [Delete](#) [Edit](#)

**Branch 1**  
LG-24, Petaling Jaya Mall  
Jalan Jaya 3  
54680 Petaling Jaya, Selangor  
Malaysia [No Lift Access](#) [Require Permit](#)

Billing Address [Add New Address](#)

**MyCompany Sdn Bhd**  
Finance PIC - 0345678912  
No. 24, Menara MyCompany  
21, Jalan Kuala Lumpur 3  
54800 Kuala Lumpur, Kuala Lumpur  
Malaysia





# Settings - Company Profile - Addresses - Adding Addresses

Settings : Company Profile

MyCompany

Details Addresses Features

Delivery Address

**Head Office\***  
No.24, Ground Floor, Menara MyCompany  
21, Jalan Kuala Lumpur 3  
54800 Kuala Lumpur, Kuala Lumpur  
Malaysia

Lift Access

Delete Edit

**Branch 1**  
L.G.-24, Petaling Jaya Mall  
Jalan Jaya 3  
54680 Petaling Jaya, Selangor  
Malaysia

No Lift Access Require Permit

Billing Address

**MyCompany Sdn Bhd**  
Finance PIC - 0345678912  
No. 24, Menara MyCompany  
21, Jalan Kuala Lumpur 3  
54800 Kuala Lumpur, Kuala Lumpur  
Malaysia

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



# Settings - Company Profile - Adding Delivery Addresses

Settings : Company Profile

MyCompany

Details Addresses Features

Delivery Address

**Head Office\***  
No 24, Ground Floor, Menara MyCompany  
21, Jalan Kuala Lumpur 3  
54900 Kuala Lumpur, Kuala Lumpur  
Malaysia

**Branch 1**  
LG-24, Petaling Jaya Mall  
Jalan Jaya 3  
54680 Petaling Jaya, Selangor  
Malaysia

**Branch Name \***  
Branch Name

**Unit** **Floor** **Building Name \***  
Unit Floor Building Name

**Street \***  
Street Name

**Postcode \*** **City \*** **State \***  
Postcode City State

Require Delivery Permit  
 Lift Access Available

Cancel Save

Add New Address

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



# Settings - Company Profile - Adding Billing Addresses

Settings - Company Profile

MyCompany

Details Addresses Features

Delivery Address

**Head Office\***  
No 24, Ground Floor, Menara MyCompany  
21, Jalan Kuala Lumpur 3  
54800 Kuala Lumpur, Kuala Lumpur  
Malaysia

**Branch 1**  
LG-24, Petaling Jaya Mall  
Jalan Jaya 3  
54680 Petaling Jaya, Selangor  
Malaysia

Finance PIC Name \*

PIC Name

Billing Entity Name \*

Entity Name

Unit Floor Building Name \*

Unit Floor Building Name

Street \*

Street Name

Postcode \* City \*

Postcode City

State Country \*

State Malaysia

PIC Phone No \*

Phone

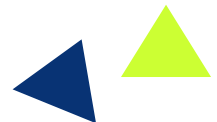
Cancel Save

Add New Address

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



# Settings - Company Profile - Addresses - Maintaining & Deleting

Settings : Company Profile

MyCompany

Details Addresses Features

Delivery Address

**Head Office\***  
No.24, Ground Floor, Menara MyCompany  
21, Jalan Kuala Lumpur 3  
54800 Kuala Lumpur, Kuala Lumpur  
Malaysia

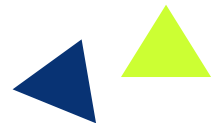
**Branch 1**  
L.G.-24, Petaling Jaya Mall  
Jalan Jaya 3  
54680 Petaling Jaya, Selangor  
Malaysia

Billing Address

**MyCompany Sdn Bhd**  
Finance PIC - 0345678912  
No. 24, Menara MyCompany  
21, Jalan Kuala Lumpur 3  
54800 Kuala Lumpur, Kuala Lumpur  
Malaysia

Click on the 'Edit' button to edit the address

Click on the 'Delete' to delete the address





# 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

Settings : Company Profile ⓘ 🏠 👤 Admin

 **MyCompany**

Details | Addresses | **Features**

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**Minimum Order Value : RM 500**

Activate No  Yes This feature allows user to set minimum order value before they can place an order

Minimum Value (RM)  Save Activated : User only able to place order where the total amount is more than RM 500

---

**Approvals**

Activate No  Yes This feature will require every company order to be approved by a manager

Default Approver  Save

---

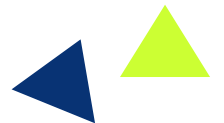
**Quotation**

Activate No  Yes This feature allows users to self-generate a quotation and later convert it to an order





# 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)

Settings : Users

2 All 1 Admin 0 Manager 1 Users

Users [Invite New User](#)

Search user based on name or email

1 - 2 of 2 First 1 Last

#	Full Name	User Email	Department	Role	Catalogues	Activate User
1	Admin Admin	admin@mycompany.com <small>Verified</small>	-	Admin	-	<input checked="" type="checkbox"/> View
2	User User	user@mycompany.com <small>Verified</small>	-	User	General	<input type="checkbox"/> View

1 - 2 of 2 First 1 Last





# Settings - User management

Settings : Users

Admin

2 All 1 Admin 0 Manager 1 Users

## Users

Search user based on name or email

Invite New User

1 - 2 of 2

First

1

Last

#	Full Name	User Email	Department	Role	Catalogues	Activate User	
1	Admin Admin	admin@mycompany.com <i>Verified</i>	-	Admin	-	<input checked="" type="checkbox"/>	View
2	User User	user@mycompany.com <i>Verified</i>	-	User	General	<input type="checkbox"/>	View

1 - 2 of 2

First

1

Last

Click to view the individual's properties

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





# 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

Settings : Users > Details

**User User MyCompany**  
Created At : 3 Jul 2019  
Last Updated At : 19 Sep 2019

**Details**

First Name: User  
Last Name: User  
Email: user@mycompany.com  
Phone Number: 01123436789  
Department: Select a department  
Role: User  
User's orders approved by: Select an approver

Delete User Update

**Catalogues**  
General x Add

**Address Options**

DELIVERY ADDRESS: Add Head Office  
BILLING ADDRESS: Add MyCompany Sdn Bhd

Assign relevant Catalogues to designated User

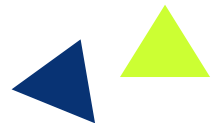
Remove access to catalogues from the User

Assign Billing and Delivery Addresses relevant to the individual





# 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

The screenshot displays the 'Company Catalogue' interface. At the top, it shows 'Catalogue : Company Catalogue' and 'Home > Company Catalogue'. Below this, there are two statistics: '5 Company Catalogue' and '7,253 Total Products Available'. The main section is titled 'List of Company Catalogues' and contains a grid of catalogue cards. Each card shows the catalogue name, 'Products In Catalogue', 'Users Attached', and an 'Active' status. A 'Create Catalogue' button is located at the bottom of the grid. The bottom left corner of the page shows a chat icon and 'ADAM V1.0'.

Company Catalogue	Products In Catalogue	Users Attached	Status	Action
Full catalogue	7,239	3	Active	Default, View
Marketing Screenshot - Catering	29	0	Active	View
Marketing Screenshot - variety of products	24	1	Active	View
Pantry Catalogue	89	29	Active	View
Furniture	1	1	Active	View



# 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

The screenshot shows the 'Company Catalogue' setup page for 'KL Branch'. The page is titled 'KL Branch' and is marked as 'Active'. It displays a description for the catalogue: 'A description for Tech equipment catalogue'. The page has a navigation bar with 'Home > Company Catalogue > KL Branch' and a 'Company Catalogue' button. The main content area is divided into two tabs: 'Products' (highlighted with a yellow box) and 'Users'. The 'Products' tab shows a search bar, a 'View List' button, and an 'Add Product' button. Below the search bar, there are filters for 'Category (All)' and 'Per Page (30)'. The main table lists products in the catalogue with columns for 'Products In Catalogue', 'UOM', and 'Remove'.

Products In Catalogue	UOM	Remove
<input type="checkbox"/> Banana Cavendish (Ripe), 1 kg Supplycart	1 kg	<input type="button" value="Remove"/>
<input type="checkbox"/> Black Seedless Grape, 1 kg Supplycart	1 kg	<input type="button" value="Remove"/>
<input type="checkbox"/> Raya Buffet Menu C (Min. Pax: 50) - LC Halal Certified	1 Pax	<input type="button" value="Remove"/>
<input type="checkbox"/> PILOT G2 Pen, 0.7 mm, Blue, 12 Pieces PILOT	1 Bundle	<input type="button" value="Remove"/>



# Catalogue - Creating a new catalogue

Catalogue : Company Catalogue

Home > Company Catalogue

5 Company Catalogue

7,253 Total Products Available

### List of Company Catalogues

New Catalogue Name

Create Catalogue

Full catalogue	Marketing Screenshot - Catering	Marketing Screenshot - variety of products
Products In Catalogue: 7,239	Products In Catalogue: 29	Products In Catalogue: 24
Users Attached: 3	Users Attached: 0	Users Attached: 1
Active Default View	Active View	Active View

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

Total number of products and users assigned to this catalogue

Input a name for the new catalogue

Click 'Create Catalogue' button to create new catalogue

Activation status of the Catalogue



# Catalogue setup - Current catalogue

Home > Company Catalogue > KL Branch

18 Products in Catalogue 0 Assigned Users

Company Catalogue

### KL Branch Active

A description for Tech equipment catalogue

Name: KL Branch Description: A description for Tech equipment catalogue Activation Status: Active Inactive

Delete Catalogue Cancel Save

Products Users

Search Product View List Add Product

1 - 18 of 18 First 1 Last

Products In Catalogue	UOM	
<input type="checkbox"/> Banana Cavendish (Ripe), 1 kg Supplycart	1 kg	<input type="checkbox"/> Remove
<input type="checkbox"/> Black Seedless Grape, 1 kg Supplycart	1 kg	<input type="checkbox"/> Remove
<input type="checkbox"/> Raya Buffet Menu C (Min. Pax: 50) - LC Halal Certified	1 Pax	<input type="checkbox"/> Remove
<input type="checkbox"/> PILOT G2 Pen, 0.7 mm, Blue, 12 Pieces PILOT	1 Bundle	<input type="checkbox"/> Remove

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



# Catalogue setup - Add new products into current catalogue

Catalogue : Company Catalogue > Details

4 Products in Catalogue 0 Assigned Users

**Demo - FV** Active

A description for Demo - FV catalogue

Products Users

Search Product

View List Add Product

Category (All) Per Page (30)

1 - 30 of 6,743 First 1 2 3 Last

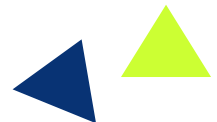
Products In Catalogue	Price/UOM
OEM Hand Trolley (150kg) OEM	RM 185.00 1 Unit <span>Add</span>
Probex USB Optical Mouse (MS-M25) Probex	RM 18.00 1 Unit <span>Add</span>
Apple iPad mini Wi-Fi + Cellular 64GB - Space Gray (MUX52ZP), DEP Apple	RM 2289.00 1 Unit <span>Add</span>
Pral Cup Pack Sugar Sachet, 100 x 5 g Gula Pral	RM 6.05 1 box <span>Remove</span>
Kingston DataTraveler Swivel, 16GB, USB 3.0 Thumbdrive (DTSWIVL/16GB) Kingston	RM 11.90 1 Unit <span>Remove</span>
OEM Hand Trolley (300kg) OEM	RM 280.50 1 Unit <span>Add</span>

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





# 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

Home > Company Catalogue > Full catalogue

6,795 Products in Catalogue 25 Assigned Users

Company Catalogue

Full catalogue **Active**

Staple items for our organisation

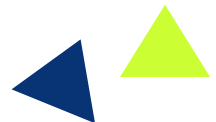
Products Users

Search user based on name or email

Assigned Users All Company Users

1 - 10 of 29 First 1 2 3 Last

Name	Email	Department	
Julian Soon	julian@supplycart.my	Tech	Remove
William Jim	finance@supplycart.my	Finance	Remove
Jonathan Oh	jonathan@supplycart.my	Sales	Remove
Jonathan Oh	jonathanoh@gmail.com	Sales	Remove
Shangrong Soh	shangrong@supplycart.my	Ops	Remove
Sharmila Chandran	accounts@supplycart.my	Finance	Add
Carmen Tan	hello@supplycart.my	Sales	Add





# Catalogue setup - Assigned users

Catalogue : Company Catalogue > Details

3 Products in Catalogue 1 Assigned Users

**Demo - FV** Active

A description for Demo - FV catalogue

Products Users

Search user based on name or email

**Assigned Users** All Company Users

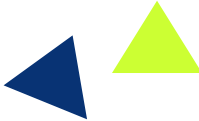
Name	Email	Department
User User	user@company.com	

Remove

Displays current users that are assigned to this catalogue

Search for an individual user

Remove users by clicking on the 'Remove' button



# Catalogue setup - Assigning new users

Catalogue : Company Catalogue > Details

A description for Demo - FV catalogue

Products

Users

Search user based on name or email

Assigned Users All Company Users

1 - 10 of 27 First 1 2 3 Last

Name	Email	Department	
Julian Soon	julian@supplycart.my	Tech	Add
William Jim	finance@supplycart.my	Finance	Remove
Jonathan Oh	jonathan@supplycart.my	Sales	Remove
Jonathan Oh	jonathanoh@gmail.com	Sales	Add

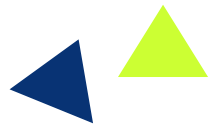
'All Company Users' displays all users available to be assigned to a catalogue

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





# Catalogue pricing



# Catalogue pricing - Introduction

## Side-menu:

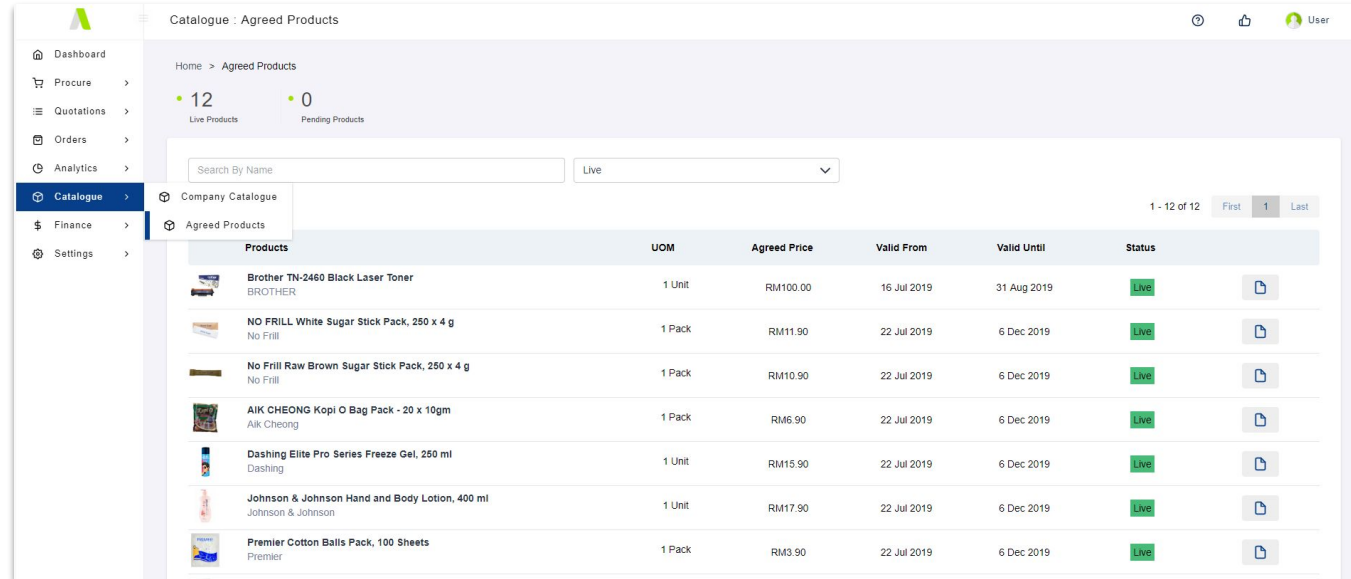
Catalogue > Agreed Products

## 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










Catalogue : Agreed Products

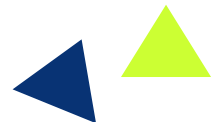
Home > Agreed Products

12 Live Products 0 Pending Products

Search By Name  Live

1 - 12 of 12 First 1 Last

Products	UOM	Agreed Price	Valid From	Valid Until	Status
 <b>Brother TN-2460 Black Laser Toner</b> BROTHER	1 Unit	RM100.00	16 Jul 2019	31 Aug 2019	Live
 <b>NO FRILL White Sugar Stick Pack, 250 x 4 g</b> No Frill	1 Pack	RM11.90	22 Jul 2019	6 Dec 2019	Live
 <b>No Frill Raw Brown Sugar Stick Pack, 250 x 4 g</b> No Frill	1 Pack	RM10.90	22 Jul 2019	6 Dec 2019	Live
 <b>AIK CHEONG Kopi O Bag Pack - 20 x 10gm</b> Aik Cheong	1 Pack	RM6.90	22 Jul 2019	6 Dec 2019	Live
 <b>Dashing Elite Pro Series Freeze Gel, 250 ml</b> Dashing	1 Unit	RM15.90	22 Jul 2019	6 Dec 2019	Live
 <b>Johnson &amp; Johnson Hand and Body Lotion, 400 ml</b> Johnson & Johnson	1 Unit	RM17.90	22 Jul 2019	6 Dec 2019	Live
 <b>Premier Cotton Balls Pack, 100 Sheets</b> Premier	1 Pack	RM3.90	22 Jul 2019	6 Dec 2019	Live



# Catalogue pricing - List of agreed products prices

Products	UOM	Agreed Price	Valid From	Valid Until	Status	
Brother TN-2460 Black Laser Toner BROTHER	1 Unit	RM100.00	16 Jul 2019	31 Aug 2019	LIVE	
NO FRILL White Sugar Stick Pack, 250 x 4 g No Fill	1 Pack	RM11.90	22 Jul 2019	6 Dec 2019	LIVE	
No Frill Raw Brown Sugar Stick Pack, 250 x 4 g No Fill	1 Pack	RM10.90	22 Jul 2019	6 Dec 2019	LIVE	
AIK CHEONG Kopi O Bag Pack - 20 x 10gm Aik Cheong	1 Pack	RM6.90	22 Jul 2019	6 Dec 2019	LIVE	
Dashing Elite Pro Series Freeze Gel, 250 ml Dashing	1 Unit	RM15.90	22 Jul 2019	6 Dec 2019	LIVE	
Johnson & Johnson Hand and Body Lotion, 400 ml Johnson & Johnson	1 Unit	RM17.90	22 Jul 2019	6 Dec 2019	LIVE	
Premier Cotton Balls Pack, 100 Sheets Premier	1 Pack	RM3.90	22 Jul 2019	6 Dec 2019	LIVE	

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

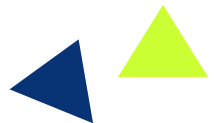
Attached documentation confirming price agreement (future feature)

Validity period of the Agreed Price





# Finance - PO Policy



# Finance - PO Settings - Overview

## Side-menu:

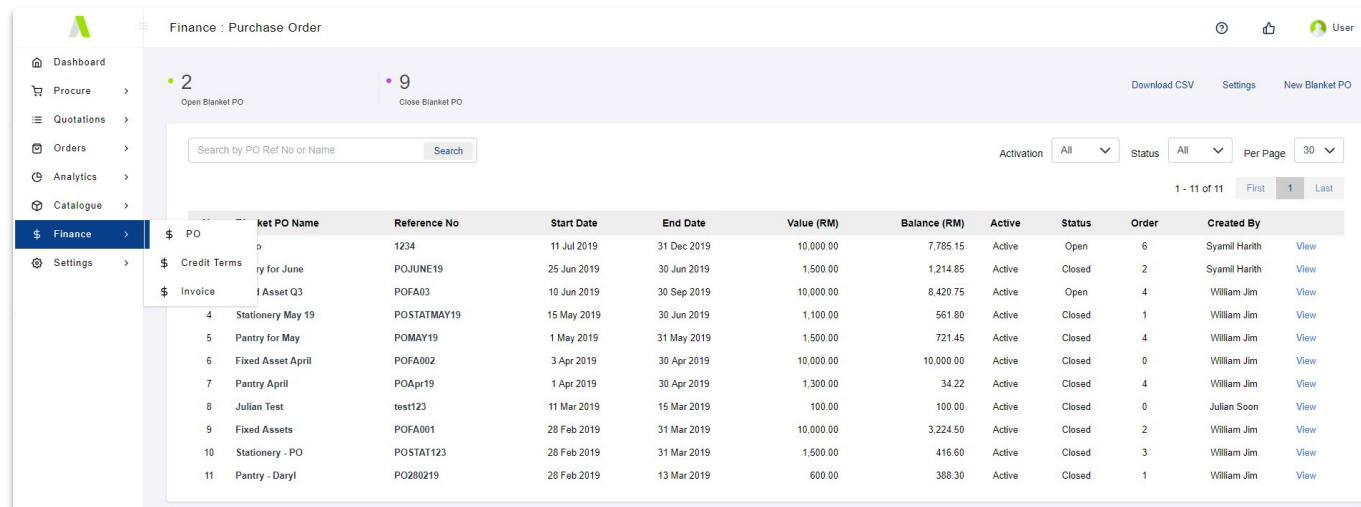
Finance > PO

## 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



The screenshot displays the 'Finance: Purchase Order' interface. The left sidebar contains a navigation menu with 'Finance' selected. The main content area shows a table of blanket POs with columns for PO Name, Reference No, Start Date, End Date, Value (RM), Balance (RM), Active status, Status, Order, and Created By. The table lists 11 items, including POs for Stationery, Pantry, Fixed Assets, and Credit Terms.

Blanket PO Name	Reference No	Start Date	End Date	Value (RM)	Balance (RM)	Active	Status	Order	Created By
PO	1234	11 Jul 2019	31 Dec 2019	10,000.00	7,785.15	Active	Open	6	Syamil Harith
Credit Terms	POJUNE19	25 Jun 2019	30 Jun 2019	1,500.00	1,214.85	Active	Closed	2	Syamil Harith
Invoice	POFA03	10 Jun 2019	30 Sep 2019	10,000.00	8,420.75	Active	Open	4	William Jim
4 Stationery May 19	POSTATMAY19	15 May 2019	30 Jun 2019	1,100.00	561.80	Active	Closed	1	William Jim
5 Pantry for May	POMAY19	1 May 2019	31 May 2019	1,500.00	721.45	Active	Closed	4	William Jim
6 Fixed Asset April	POFA002	3 Apr 2019	30 Apr 2019	10,000.00	10,000.00	Active	Closed	0	William Jim
7 Pantry April	POApr19	1 Apr 2019	30 Apr 2019	1,300.00	34.22	Active	Closed	4	William Jim
8 Julian Test	test123	11 Mar 2019	15 Mar 2019	100.00	100.00	Active	Closed	0	Julian Soon
9 Fixed Assets	POFA001	28 Feb 2019	31 Mar 2019	10,000.00	3,224.50	Active	Closed	2	William Jim
10 Stationery - PO	POSTAT123	28 Feb 2019	31 Mar 2019	1,500.00	416.60	Active	Closed	3	William Jim
11 Pantry - Daryl	PO280219	28 Feb 2019	13 Mar 2019	600.00	388.30	Active	Closed	1	William Jim



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

Finance : Purchase Order

Home > PO

7 Open Blanket PO    8 Close Blanket PO

Download CSV    Settings    New Blanket PO

Search by PO Ref No or Name  Search

Activation: All    Status: All    Per Page: 30

1 - 15 of 15    First    1    Last

#	Blanket PO Name	Reference No	Start Date	End Date	Value (RM)	Balance (RM)	Active	Status	Order	Created By	
1	Weekly Pantry Budget	PO-1029	4 Jul 2019	4 Aug 2019	1,200.00	497.15	Active	Open	2	William Jim	<a href="#">View</a>
2	Office supplies	PO-1027	27 Jun 2019	27 Jul 2019	600.00	600.00	Active	Open	0	William Jim	<a href="#">View</a>
3	Office Supplies	PO1025	26 Jun 2019	26 Jul 2019	2,000.00	1,417.00	Active	Open	3	William Jim	<a href="#">View</a>
4	Whiteboard	PO-0003	21 Jun 2019	21 Jul 2019	241.50	0.00	Active	Open	1	William Jim	<a href="#">View</a>
5	Stationery 20.06.19	PO-0002	20 Jun 2019	20 Jul 2019	243.20	0.00	Active	Open	1	William Jim	<a href="#">View</a>
6	PO for Company Retreat	PO1024	20 Jun 2019	20 Jul 2019	15,000.00	14,829.00	Active	Open	1	William Jim	<a href="#">View</a>
7	Fixed Asset Q3	POFA03	10 Jun 2019	30 Sep 2019	10,000.00	10,000.00	Active	Open	0	William Jim	<a href="#">View</a>
8	Stationery May 19	POSTATMAY19	15 May 2019	30 Jun 2019	1,100.00	561.80	Active	Closed	1	William Jim	<a href="#">View</a>

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





# 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

Finance : Purchase Order Settings

Home > PO > Settings

### Purchase Order Activation

Activate PO : No  Yes  PO field will be shown during checkout and in your order history.

Compulsory upon checkout : No  Yes  User can place order only if PO reference number is entered

Does your company have a minimum value threshold where purchases do NOT require a PO?

No  Yes  Please input the maximum value of purchases where PO is not required

RM

Please select at least one type of PO that is allowed to be used :

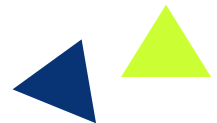
Blanket PO

One Off PO \*

Attachment Compulsory upon Checkout \*

\* Before placing an order, users must input any one-off PO reference with attachment if value is more than RM300.00

Cancel

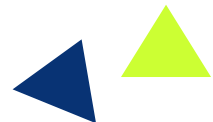


# Finance - PO Settings - Create new blanket PO (overview)

The screenshot displays the 'Finance : Purchase Order' settings page. On the left is a navigation menu with options: Dashboard, Procure, Quotations, Orders, Analytics, Catalogue, Finance, and Settings. The main content area shows a breadcrumb 'Home > PO' and two buttons: '7 Open Blanket PO' and '8 Close Blanket PO'. At the top right of the main area are links for 'Download CSV', 'Settings', and 'New Blanket PO'. Below these is a search bar labeled 'Search by PO Ref No or Name' and a 'Search' button. Further right are filters for 'Activation' (set to 'All'), 'Status' (set to 'All'), and 'Per Page' (set to '30'). Below the filters is a pagination control showing '1 - 15 of 15' items, with 'First', '1', and 'Last' buttons. The main part of the page is a table with the following data:

#	Blanket PO Name	Reference No	Start Date	End Date	Value (RM)	Balance (RM)	Active	Status	Order	Created By	
1	Weekly Pantry Budget	PO-1029	4 Jul 2019	4 Aug 2019	1,200.00	497.15	Active	Open	2	William Jim	<a href="#">View</a>
2	Office supplies	PO-1027	27 Jun 2019	27 Jul 2019	600.00	600.00	Active	Open	0	William Jim	<a href="#">View</a>
3	Office Supplies	PO1025	26 Jun 2019	26 Jul 2019	2,000.00	1,417.00	Active	Open	3	William Jim	<a href="#">View</a>

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

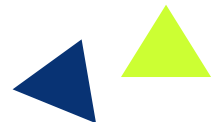
Select Billing Entity for  
this Blanket PO

Toggle slider to  
activate/deactivate  
this PO

Click to attach PDF of  
the PO

Click to create  
Blanket PO

The screenshot shows a web interface for creating a new blanket purchase order. The form is titled 'Purchase Order - New Blanket PO' and is divided into two main sections: 'BLANKET PO DETAILS' and 'BLANKET PO ATTACHMENTS'. The 'BLANKET PO DETAILS' section contains several input fields: 'Name' (with a callout box), 'Reference Number' (with a callout box), 'PO Period' (with a callout box), 'Value (RM)' (with a callout box), 'Billing Entity' (with a callout box), and 'Activate' (with a callout box). The 'Activate' field is a toggle slider currently set to 'No'. Below the 'Activate' field, there is a note: '\*The creator of this PO will receive an automated email reminder once 80% of this blanket PO has been utilised.' The 'BLANKET PO ATTACHMENTS' section has a button 'Add PDF Attachment' (with a callout box) and a message 'No attachment available'. At the bottom right of the form, there are two buttons: 'Cancel' and 'Create New PO' (with a callout box). The breadcrumb navigation at the top reads 'Home > PO > New Blanket PO'.



# Finance - PO Settings - Monitor blanket POs

Home > PO

1 Open Blanket PO      2 Close Blanket PO

Download CSV   Settings   New Blanket PO

Search by PO Ref No or Name  Search

Activation All Status All Per Page 30

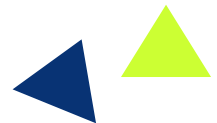
1 - 3 of 3 First 1 Last

#	Blanket PO Name	Reference No	Start Date	End Date	Value (RM)	Balance (RM)	Active	Status	Order	Created By	
1	Test PO	PO-empire	1 Jun 2019	30 Jun 2019	20,000.00	20,000.00	Active	Open	0	Julian Soon	<a href="#">View</a>
2	Empire PO May	123empire	16 May 2019	31 May 2019	4,000.00	4,000.00	Active	Closed	0	Julian Soon	<a href="#">View</a>
3	TESTPO	POJUNE-EMPIRE	16 May 2019	31 May 2019	3,000.00	2,441.50	Active	Closed	1	sales SCMY	<a href="#">View</a>

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



# 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

Finance - Purchase Order Details

Home > PO > PO-1027

Purchase Order - PO-1027

BLANKET PO DETAILS

Name: Office supplies

Reference Number: PO-1027

PO Period: 27 Jun 2019 - 27 Jul 2019

Value (RM): 600

Billing Entity: Freshcart Grocer Sdn Bhd

Activate:  Yes

Status: Open

Total Orders: 0

Balance (RM): 600.00

Created By: William Jim

Created At: 27 Jun 2019, 05:35 PM

\*The creator of this PO will receive an automated email reminder once 80% of this blanket PO has been utilised.

CHANGE LOG

STATUS	DATE	DESCRIPTION
UPLOADED	27 Jun 2019, 05:35 PM	PO attachment Purchase-Order---PO1027-(1).pdf uploaded by William Jim
CREATED	27 Jun 2019, 05:35 PM	PO created by William Jim

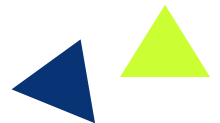
BLANKET PO ATTACHMENTS

ATTACHMENT	DATE
Purchase-Order---PO1027-(1).pdf By William Jim	27 Jun 2019, 05:35 PM

Buttons: Delete, Cancel, Save Changes



# Finance - Credit terms





# Finance - Credit Terms

## Side-menu:

Finance > Credit Terms

## Page purpose:

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

Finance : Credit Terms

Dashboard

Procure >

Quotations >

Orders >

Analytics >

Catalogue >

**\$ Finance >**

- \$ PO
- \$ Credit Terms**
- \$ Invoice

RM **300.00** credits

**30** days payment term

Thank you very much for your recent credit application. We have reviewed your application and are pleased to inform you that we will be providing your company with a credit amount of **RM 300.00** and **30 days payment terms**.

This should be sufficient to support you with 2 months of purchases. However, if you do require extra credit due to ad-hoc extra purchases (e.g. gifting, catering, etc.), please feel free to give us a call and we will be more than happy to discuss.

Many thanks for choosing Supplycart and we look forward to providing you with products & services that will support you in managing your office better!

ADAM V1.0



—  
**Begin your  
procurement  
journey  
today with  
Supplycart**

**Procurement  
Made Easy**

