

# PR CATALOGUE

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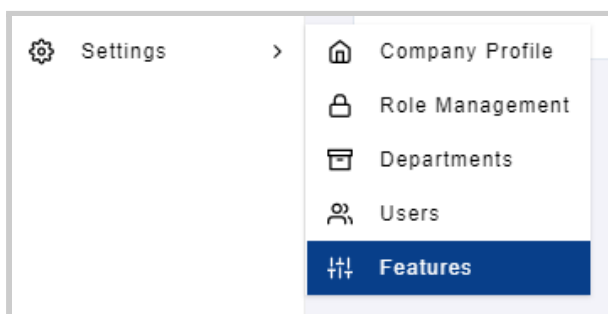
## Purpose

This module will allow Administrators to:

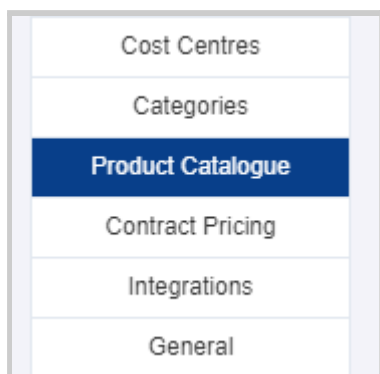
- create & manage your own list of items (with or without price)
- assign these items to customised catalogues, that can be used together with the RQ-PR-PO module
- assign these catalogues to users (only allowing users to see what they need to)

## Activating PR Catalogue

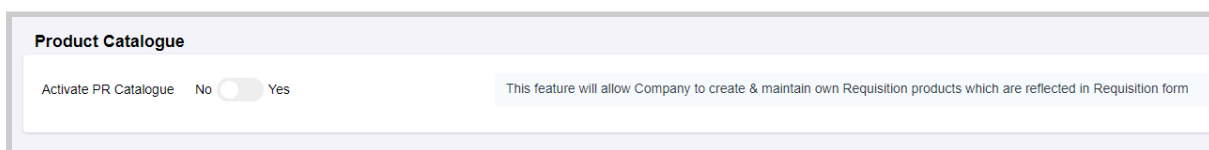
At Settings, Click on 'Features'.



This will take you to the Features page, where you can activate this feature. Click on 'Product Catalogue'.



This will take you to the section where you can toggle to activate the PR Catalogue.



## Creating Product List

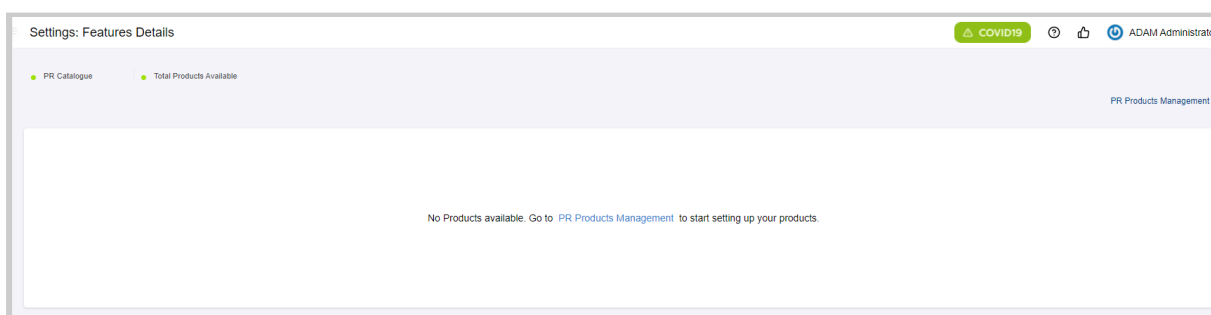
This Section will cover the creation of PR Products to be used at the Requisition Modules

**Step 1:** Under 'Catalogue', click on 'PR Catalogue'

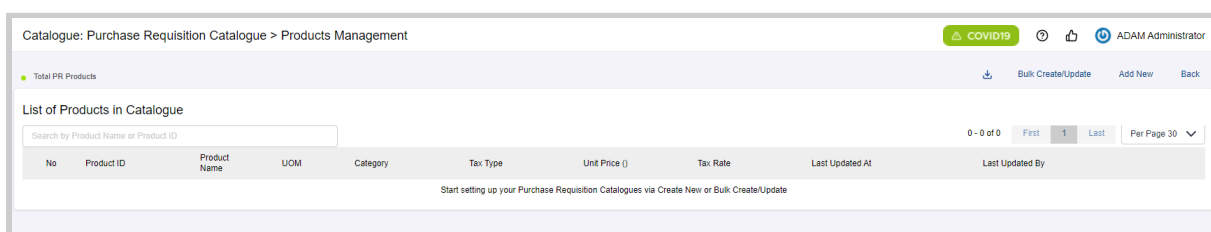


This will take you to the page where all PR Product Catalogues are maintained in ADAM.

**Step 2:** Click on 'PR Product Management'



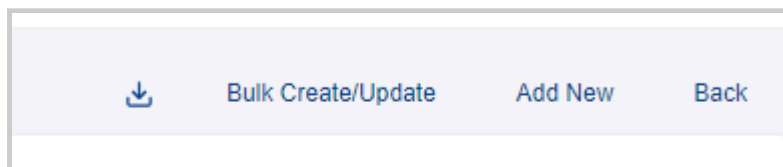
This page will list out all products that have been created for cataloguing



PR Products can be created via two methods:

## Method 1: Creating Individual Products

### Step 1: Click on 'Add New'



### Step 2: Complete the New Product Form

To create a new product, the following actions are compulsory:-

- Fill up the Product Name
- Select the UOM (Unit of Measurement)
- Select the Tax Type & Tax Rate (if applicable)

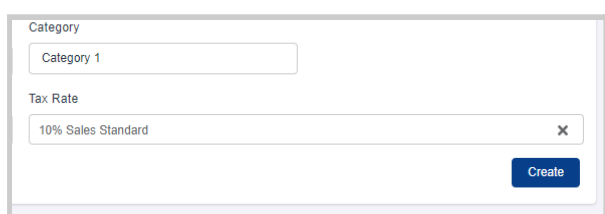
**Note:** The Tax Type will determine the following:

- Tax Rates to be selected
- Catalogues that can select this product

If you have additional details, you may also complete the following optional fields:-

- Product ID
- Category (if customised categories is activated, it will link - coming soon)
- Product Description
- Unit Price

### Step 3: Click 'Create'



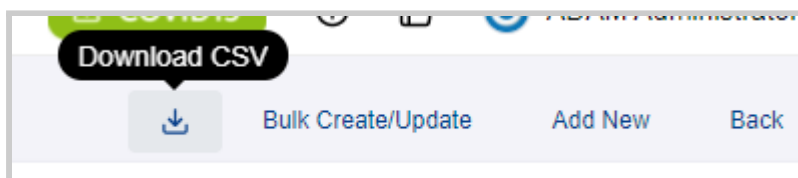
This will create the one new product in the Product List

<div> <div>9</div> <div>Total PR Products</div> <div> <a href="#">Bulk Create/Update</a> <a href="#">Add New</a> <a href="#">Back</a> </div> </div>									
List of Products in Catalogue									
<div> <div>Search by Product Name or Product ID</div> <div>1 - 9 of 9</div> <div> <a href="#">First</a> <a href="#">1</a> <a href="#">Last</a> </div> <div>Per Page 30</div> </div>									
No	Product ID	Product Name	UOM	Category	Tax Type	Unit Price ()	Tax Rate	Last Updated At	Last Updated By
1		MacBook Pro	Unit		No Tax	-	-	01 Aug 2021, 01:53 AM	Julian Soon
2		MacBook Air	Unit		No Tax	-	-	20 May 2021, 19:22 PM	Julian Soon
3		iPad	Unit		No Tax	-	-	20 May 2021, 19:22 PM	Julian Soon
4		iPad Air	Unit		No Tax	-	-	20 May 2021, 19:22 PM	Julian Soon

## Method 2: Batch Creation/Update of Products

### Step 1: Download the PR Catalogue Template

At the Product List page, click on the 'Download CSV' icon



This will download a CSV template for you to complete

	A	B	C	D	E	F	G	H	I
1	Id	Product ID	Product Name	Product D	Category	UOM	Tax Type	Unit Price	Tax Rate
2									
3									
4									
5									

### Step 2: Complete the Template

Complete the columns for each product. Similar to creating individual products, the **Product Name**, **Product UOM**, and **Tax Type** are compulsory.

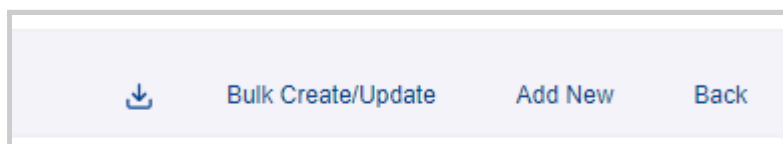
**Note:** The 'Id' field is a system reference field and should not be amended or filled up.

All other columns can be filled up if you have the relevant information.

Save the template once you have input all products to be uploaded.

### Step 3: Upload the Template

At the Product List page, click on 'Bulk Create/Update'



Click on 'Select Bulk Create/Update Data' (CSV Only), and select your Template File from the popup.

Click on 'Bulk Create/Update' to upload your data into ADAM.

×

Bulk Create/Update

**Note:** If any compulsory columns are incomplete, or if the data is incorrect, the system will prompt a message highlighting the specific product line and error type.

Catalogue: Purchase Requisition Catalogue > Products Management

Total PR Products

BULK CREATE/UPDATE PR PRODUCTS

PR products 20210805 0147.csv

×

Line 2: The selected tax type is invalid.

# Setting Up Catalogues

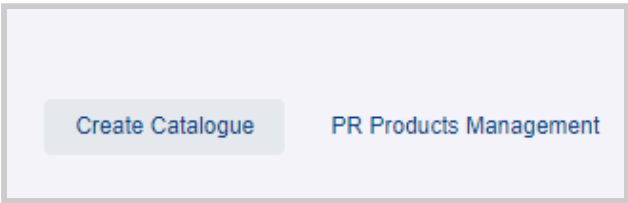
This section will explain Products that can be added into customised catalogues for your users.

## Creating New PR Catalogues

This section will explain how catalogues can be created.

**Step 1: Create new catalogue**

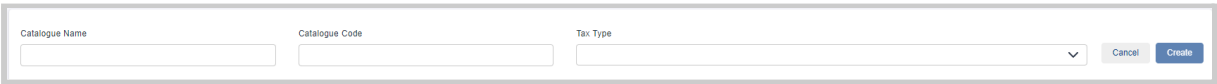
At the Catalogue > PR Catalogue page, click ‘Create Catalogue’.



**Step 2: Input Catalogue Details**

Key in the Catalogue Name, Code (Optional), and Tax Type.

**Note:** Only products with the same Tax Type as the Catalogue will be able to be added into a catalogue

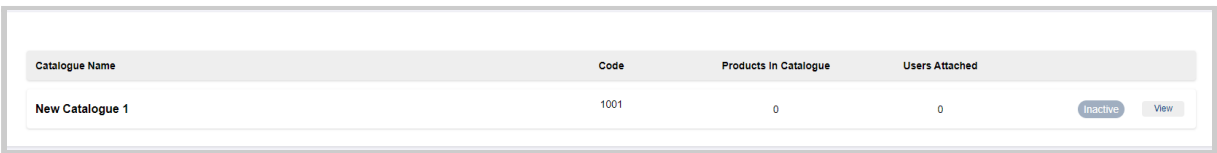
A screenshot of a form for creating a new catalogue. It has three input fields: 'Catalogue Name', 'Catalogue Code', and 'Tax Type'. The 'Tax Type' field is a dropdown menu. There are 'Cancel' and 'Create' buttons at the bottom right.

## Activating Catalogues

This section will explain how catalogues can be activated or deactivated

**Step 1: Select catalogue**

At the Catalogue > PR Catalogue page, click on ‘View’



Catalogue Name	Code	Products In Catalogue	Users Attached	
New Catalogue 1	1001	0	0	<span>Inactive</span> <span>View</span>

This will display the Catalogue’s product & user details



New Catalogue 1Inactive

Products

Users

Search by Product ID or Product Name

1 - 23 of 23First1LastPer Page 30

	Product ID	Product Name	UOM	Category	Tax Type	Unit Price (MYR)	Tax Rate	
<input type="checkbox"/>	1023	Service 9	Unit		No Tax	0.00	-	Add
<input type="checkbox"/>	1022	Service 8	Unit		No Tax	0.00	-	Add
<input type="checkbox"/>	1021	Service 7	Unit		No Tax	0.00	-	Add
<input type="checkbox"/>	1020	Service 6	Unit		No Tax	0.00	-	Add

View ListAdd Product

**Step 2:** Click the ‘Settings’ icon

This will display the Catalogues’ details as well as a toggle for the Activation Status

New Catalogue 1Inactive

\* Required field

Name \*

Code \*

Description

Activation Status

New Catalogue 1

1001

No ☐ Yes ☐

Delete Catalogue

CancelSave

**Step 3:** Toggle the Activation Status

To activate or deactivate the catalogue, toggle the ‘Activation Status’, then click ‘Save

The updated status will be displayed at the ‘Catalogue > PR Catalogue’ page

Catalogue Name	Code	Products in Catalogue	Users Attached	
New Catalogue 1	1001	7	3	<div>ActiveView</div>

**Note:** Deactivating a catalogue will cause it to NOT appear to anyone that was previously assigned.



## Adding Products into PR Catalogue

This section will explain how Products can be added into the catalogues created as per the section above

### Step 1: Select catalogue

At the Catalogue > PR Catalogue page, click on 'View'

Catalogue Name	Code	Products In Catalogue	Users Attached	
New Catalogue 1	1001	0	0	<span>Inactive</span> <span>View</span>

This will display the Catalogue's product & user details

### Step 2: Click 'Add Product'

Catalogue: Purchase Requisition Catalogue > Details

COVID19

ADAM Administrator

Products in Catalogue

Assigned Users

PR Catalogue

New Catalogue 1

Inactive

Products

Users

Search by Product ID or Product Name

View List

Add Product

0 - 0 of 0

First

1

Last

Per Page 30

	Product ID	Product Name	UOM	Category	Tax Type	Unit Price (MYR)	Tax Rate
This catalogue is empty. Lets add some products!							

0 - 0 of 0

First

1

Last

Per Page 30

This will display a list of all products that can be added to the catalogue.

**Note:** Only products that match the Tax Type of the Catalogue will be displayed

New Catalogue 1

Inactive

Products

Users

Search by Product ID or Product Name

View List

Add Product

1 - 23 of 23

First1Last

Per Page 30

	Product ID	Product Name	UOM	Category	Tax Type	Unit Price (MYR)	Tax Rate	
<input type="checkbox"/>	1023	Service 9	Unit		No Tax	0.00	-	Add
<input type="checkbox"/>	1022	Service 8	Unit		No Tax	0.00	-	Add
<input type="checkbox"/>	1021	Service 7	Unit		No Tax	0.00	-	Add
<input type="checkbox"/>	1020	Service 6	Unit		No Tax	0.00	-	Add

Products can be added in one of two ways:-

1. Click on the 'Add' button next to the individual products

Unit Price (MYR)	Tax Rate	
0.00	-	<button>Add</button>
0.00	-	<button>Add</button>

2. Select multiple products, and click on the 'Add Selected Products' option

<input type="checkbox"/>	Product ID	Product Name	UOM
<input type="checkbox"/>			
<input checked="" type="checkbox"/>		ce 8	Unit
<input checked="" type="checkbox"/>	1021	Service 7	Unit
<input type="checkbox"/>	1020	Service 6	Unit

## Assigning Users to Catalogues

This section will explain how Users are given access to catalogues

### Method 1: From the Catalogues Page

This section will explain how Products can be added into the catalogues created as per the section above

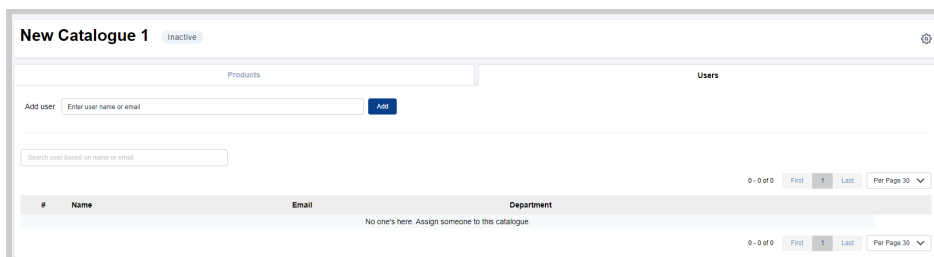
#### Step 1: Select catalogue

At the Catalogue > PR Catalogue page, click on 'View'

Catalogue Name	Code	Products In Catalogue	Users Attached	
New Catalogue 1	1001	0	0	<button>Inactive</button> <button>View</button>

This will display the Catalogue's product & user details

#### Step 2: Click the 'Users' tab



This will display a list of all users assigned to the catalogue.

### **Step 3: Search for Users to add**

At the 'Add user' field, search for each user's name, then click 'Add'



This will give the user access to the catalogue

## **Method 2: From the User Management**

Users can also be assigned catalogues via the 'Settings > Uses' page.

***Please refer to the User Management guide for more information.***