



PURCHASE ORDER FORM

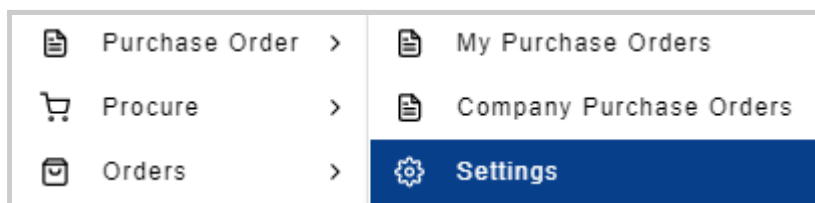
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Activating the Purchase Order Module

This section will explain how the Administrator will activate the Purchase Order module.

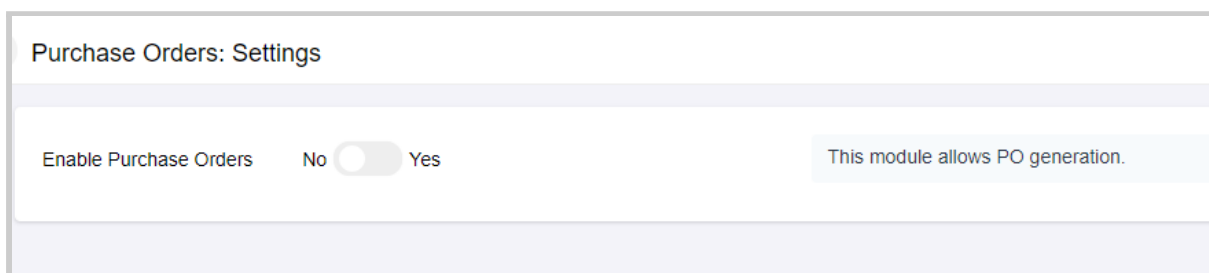
Activating Purchase Orders

Step 1: Under Purchase Order, click on 'Settings'



Step 2: Activate Purchase Orders

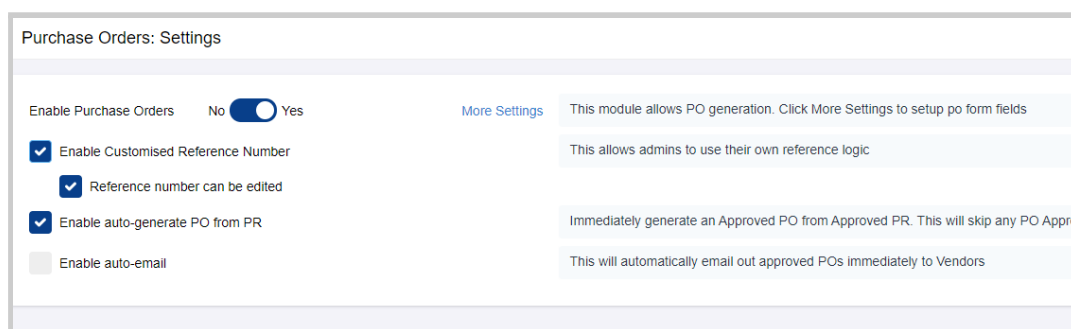
Enable the toggle to activate Purchase Orders.



Purchase Order Module Features

For the Purchase Orders, you may activate the following features

1. Enable Customised PO Numbers
2. Enable POs to be automatically generated when a PR has been approved
Note: The PR Form Fields must match the PO Form Fields for this feature to be activated
3. Enable auto-email of POs to the Supplier (coming soon)



Configure Purchase Order Form Fields

This section will explain how to configure your PO Form Fields

Step 1: Configure 'Form Fields'

At the 'Purchase Order: Settings' page, click on 'More Settings'

This will take you to a page that displays all fields that can be added into the Purchase Order Form.

Under 'Form Fields', there will be a list of fields that you can action upon. You can either:

- **Activate Field** : When you activate a specific field , it would be displayed in the Purchase Order form
- **Make Field Compulsory** : This would make the field in the Purchase Order form compulsory. Users would not be able to proceed to the next step if the field is not filled in
- **Display Field in PDF**: To display a certain field in the PO pdf, click on the checkbox and this information would be displayed in your PO pdf

Activation	Compulsory	Display in PDF?
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Once you have customized the form according to your requirements, click 'Save'

Step 2: Configure PO pdf

This section is to configure on how your PO will look like when it is downloaded.

To add Company Logo, attach an image of your company logo.
Input your Company's Terms & Conditions for PO under the 'Term & Conditions' field
Once completed, click 'Save'.

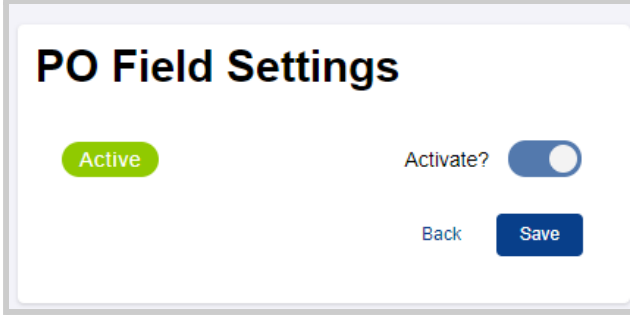
Click on 'PO Preview' to view a sample of your PO PDF.

#	Item	UOM	QTY	Tax	Unit Price	Amount
1	Product A	Unit	1.0000	0 %	10.0000	10.00
Subtotal Incl. SST						10.00
SST Amount						0.00
Total Amount (MYR)						10.00

Step 3: Save and Activate Form

Once you have customized the form according to your requirements, click 'Save'.

To activate the form, enable the activation toggle and click 'Save'.

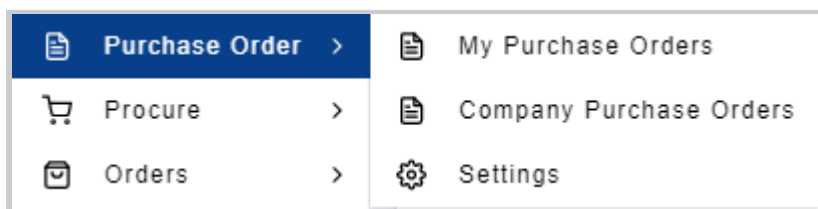


The image shows a dialog box titled "PO Field Settings". Inside the dialog, there is a green pill-shaped button labeled "Active". To the right of this button is the text "Activate?" followed by a blue toggle switch that is currently in the "on" position. Below the "Activate?" text are two buttons: a blue "Back" button and a blue "Save" button.

Creating Purchase Orders

This section explains how users can create Purchase Orders.

Step 1: Under Purchase Orders, click 'My Purchase Orders'



Click 'Create New' to create a new Purchase Order.

Filling Up Form Details

There are two main sections in filling up the form:

1. Main Information
2. Vendor Information
3. Item/Service Information

Purchase Orders: Purchase Orders Form

COVID19 ⓘ ⓘ ⓘ ADAM Administrator

Main Information

Requestor name ADAM Administrator Supplycart	Requestor email adam1@supplycart.my	Requestor contact number 0123456789
Delivery address	Billing entity	
Purchase Order Reference Number <i>Reference number is empty</i>	Purchase Requisition Reference Number <i>Reference number is empty</i>	Delivery date
Attach documents Quotation Others		Department
Internal comments		

Vendor Information

Vendor name	Vendor address
-------------	----------------

Items/Services Information

#	Name	UOM	Quantity	Unit price	Tax	Amount (MYR)	Dimensions
Add Row OR Select catalogue							
Subtotal (Include Tax)							0.00
Tax Amount							0.00
Total Amount							0.00

Cancel Set

Main Information

This section relates to the Requestor's details.

Main Information			
Requestor name	Requestor email	Requestor contact number *	
ADAM Administrator Supplycart	adam1@supplycart.my	0123456789	
Delivery address *	Billing entity *		
Purchase Order Reference Number	Purchase Requisition Reference Number	Delivery date	Department *
<small>Reference number is empty</small>	<small>Reference number is empty</small>		
Attach documents	Internal comments		
<input type="button" value="Quotation"/> <input type="button" value="Others"/>			

The Requestor's name, email & contact number would already be pre-filled.

Select Delivery & Billing Address assigned to you. Attach any quotation or other documents if applicable.

Input any Internal Comments if necessary. These internal comments would be seen by the PO's approvers.

Vendor Information

Select the Vendor's name from the dropdown list

Note:

- This list of Vendors is maintained in the 'My Vendor' Module
- Only vendors that are 'Active' will be displayed

Vendor Information	
Vendor name *	Vendor address
Supplycart Technologies <input type="button" value="X"/>	PG-02, Mutiara Oriental Jalan BM1/8 Taman Bukit Mayang Mas Petaling Jaya, 47601 Selangor, Malaysia

Item/Service Information

In this section, users would be required to input details pertaining to the item that they would like to raise a PO for

There are two methods where a user can input the item that they would like to request for

Method 1: Using the Catalogue Feature

Step 1: Select the catalogue assigned to you.

A list of items will be populated from the catalogue.

Notes:

- Prices will be automatically filled if they have been set up under 'PR catalogue'. The price field will also be locked and is not editable
- If the prices have not been set up under 'PR catalogue', manual price input would be required

Step 2: Fill in Item Details

Fill in the Quantity, Unit Price & Dimensions. Depending on your form set up, there may be additional columns that would appear in the table such as :

- Item Code
- GL Code
- Item Description

ITEM DIMENSIONS:

Stock on hand *

Item delivery date

Remarks

0

Under Item Dimensions, there may be other fields that appear as well. Some of the fields are as follows:

- Stock on Hand
- Category
- Department
- Project Code
- Item Delivery Date

Once completed, click 'Next'.

Method 2: Add Row

Step 1: Select Add Row

If the item is not in the catalogue, click 'Add Row'

Items/Services Information

#	Name	UOM	Quantity	Unit price	Amount (MYR)	Dimensions
1			1.00	0.0000	0.00	Info

Add Row
OR
Select catalogue

Step 2: Fill in Item Details

Input Name, UOM, Quantity, Unit Price & Dimensions.

There may be other columns that would appear in the table such as :

- Item Code
- GL Code
- Item Description

Submit Purchase Order

Review all of the details in your Purchase Order to ensure that it is complete & accurate.

Request: Request Form COVID19 ADAM Administrator

1 Form Type Pick your form type → 2 Requestor Info Fill in your information → 3 Items/Services Info Fill in the items that you need → 4 **Summary** Revise form and submit

Summary

Requestor Information

Requestor name ADAM Administrator Supplycart	Requestor email adam1@supplycart.my	Requestor contact number 0123456789	Delivery address 2 Jalan 13/1, Seksyen 13 Petaling Jaya, 46200 Selangor, Malaysia
Billing entity Dream Centre 2 Jalan 13/1, Seksyen 13 Petaling Jaya, 46200 Selangor, Malaysia	Request Reference Number CES/REQ/21/00001 <small>This reference number might be changed once submitted</small>	Attachments N/A	Internal comments N/A

Item/Service Information

#	Name	UOM	Quantity	Dimensions
1	Test Item 1	Unit	1.00	Info
2	Test Item 2	Piece	1.00	Info

[Cancel](#) [Back](#) [Submit](#)

Click 'Submit' to confirm your submission.

Upon submission, you will receive an email confirming that the PO is pending for approval.

Approving Purchase Orders

Purchase Orders submitted can be approved either via ADAM or via Email.

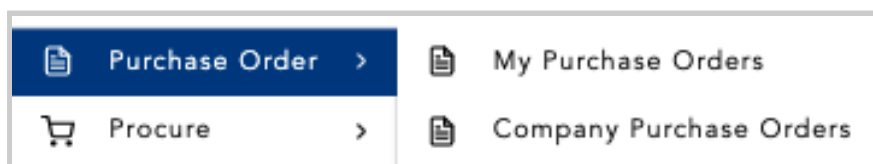
Please refer to the **Approval User Guide** for further details on how Purchase Orders can be approved

Viewing Purchase Orders

This section allows you to view & download your Purchase Order

My Purchase Orders

Step 1: Under Purchase Order, click on 'My Purchase Orders'



You will be redirected to a page where it shows a list of Purchase Orders that you have submitted.

										Drafted Order
Search		Filter by Status		1 - 6 of 6		First	1	Last	Per Page 30	
#	Created At	PO Ref No	Deliver To	Requestor	Department	Approver	Approved At	PR Ref No	Status	Action
1	05 Aug 2021, 03:42 PM	PO-000008	Supplycart (PG-06B)	Shangrong Soh	Sales	William Jim	05 Aug 2021, 03:43 PM	STSB/PR/21/00030	Approved	View
2	05 Aug 2021, 02:59 PM	PO-000007	Supplycart (PG-06B)	Shangrong Soh	Sales	N/A	N/A	STSB/PR/21/00028	Approved	View
3	05 Aug 2021, 02:50 PM	PO-000006	Supplycart (PG-06B)	Shangrong Soh	Sales	N/A	N/A	STSB/PR/21/00025	Approved	View
4	05 Aug 2021, 02:50 PM	PO-000005	Supplycart (PG-06B)	Shangrong Soh	Sales	N/A	N/A	STSB/PR/21/00026	Approved	View
5	05 Aug 2021, 02:50 PM	PO-000004	Supplycart (PG-06B)	Shangrong Soh	Sales	N/A	N/A	STSB/PR/21/00027	Approved	View
6	05 Aug 2021, 02:44 PM	PO-000003	Supplycart (PG-06B)	Shangrong Soh	Sales	N/A	N/A	STSB/PR/21/00022	Approved	View

Step 2: View Purchase Order Details

Click 'View' to view further details of your Purchase Order.

Purchase Orders: Details

#PO-000008 Approved

Requestor Information

Requestor Name

Shangrong Soh

Requestor Email

shangrong@supplycart.my

Requestor Contact Number

0122220821

Delivery Address

Supplycart (PG-06B)
PG06B, Mutiara Oriental Condominium
Jalan BM 1/B, Taman Bukit Mayang Emas
Petaling Jaya, 47301
Selangor, Malaysia

Billing Entity

Supplycart Technologies Sdn Bhd (201610002661)
William Jim - 03 7665 5079
P-G-02, Mutiara Oriental Condominium
Jalan BM 1/B, Taman Bukit Mayang Emas
Petaling Jaya, 47301
Selangor, Malaysia

Vendor Information

Vendor Name

IKEA

Vendor Address

2, Jalan PJU 7/2, Mutiara Damansara
Petaling Jaya, 47800
Selangor, Malaysia

Vendor Code

100002

Items Information

#

Item Name

Uom

Status

Quantity

Unit Price

Stock On Hand

Total Amount

Dimensions

1

IKEA Blomning Tin

Unit

Approved

1.00

9.90

N/A

9.90

Info

2

IKEA 365+ Coaster, 10cm

Unit

Approved

1.00

4.90

N/A

4.90

Info

Subtotal (No Tax)

14.80

Tax Amount

0.00

Total Amount

14.80

At this page you may:-

1. View and Add Internal Comments placed by approvers or Procurement

INTERNAL COMMENTS

Write comments here

Save

2. View the status of the individual items

- This will show if the item has been consolidated at a PR level with other items

Items Information							
#	Item Name	Uom	Status	Quantity	Unit Price	Stock On Hand	Total Amount
1	IKEA Blomning Tin	Unit	Approved	1.00	9.90	N/A	9.90
2	IKEA 365+ Coaster, 10cm	Unit	Approved	1.00	4.90	N/A	4.90
Subtotal (No Tax)							14.80
Tax Amount							0.00
Total Amount							14.80

3. View Approval status & log

- This will show the Approver details including the date/time the PO has been approved
- If the PO has been rejected, it would showcase the reason for rejection

Approval Status

BILLING ENTITY

SUPPLYCART
TECHNOLOGIES SDN BHD

Need to be approved by all approvers:

William Jim

05 Aug 2021, 03:43 PM

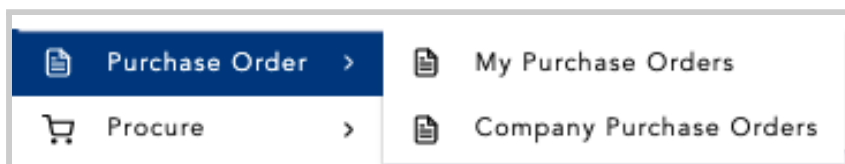
Company Purchase Orders:

This section allows you to do the following:

1. View Company Purchase Orders
2. Filter Purchase Orders

View Company Purchase Orders

Under Purchase Order, click on 'Company Purchase Orders'

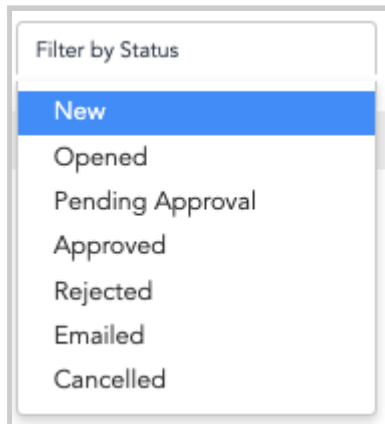


You will be redirected to a page where all of the company's Purchase Orders are listed

<input type="text" value="Search"/> <input type="text" value="Filter by Status"/> 1 - 12 of 12 First 1 Last Per Page 30 Display All Display										
#	Generated At	PO Ref No	Vendor	Deliver To	Requestor	Approver	Approved At	PR Ref No	Status	Action
1	05 Aug 2021, 03:42 PM	PO-000008	IKEA	Supplycart (PG-06B)	Shangrong	William Jim	05 Aug 2021, 03:43 PM	STSB/PR/21/00030	Approved	View
2	05 Aug 2021, 02:59 PM	PO-000007	N/A	Supplycart (PG-06B)	Shangrong	N/A	N/A	STSB/PR/21/00028	Approved	View
3	05 Aug 2021, 02:50 PM	PO-000006	N/A	Supplycart (PG-06B)	Shangrong	N/A	N/A	STSB/PR/21/00025	Approved	View
4	05 Aug 2021, 02:50 PM	PO-000005	N/A	Supplycart (PG-06B)	Shangrong	N/A	N/A	STSB/PR/21/00026	Approved	View
5	05 Aug 2021, 02:50 PM	PO-000004	N/A	Supplycart (PG-06B)	Shangrong	N/A	N/A	STSB/PR/21/00027	Approved	View
6	05 Aug 2021, 02:44 PM	PO-000003	IKEA	Supplycart (PG-06B)	Shangrong	N/A	N/A	STSB/PR/21/00022	Approved	View
7	31 Jul 2021, 05:49 PM	PO-000002	SNS Network	Supplycart (PG-06B)	Conrad	N/A	N/A	STSB/PR/21/00015	Approved	View
8	31 Jul 2021, 05:44 PM	PO-000002	A E Stamp	Supplycart (PG-02)	Conrad	N/A	N/A	STSB/PR/21/00014	Approved	View
9	31 Jul 2021, 05:04 PM	PO-000002	IKEA	Supplycart (PG-06B)	Conrad	N/A	N/A	STSB/PR/21/00011	Approved	View
10	31 Jul 2021, 04:02 PM	PO-000002	SNS Network	Supplycart (PG-02)	Conrad	N/A	N/A	STSB/PR/21/00010	Approved	View
11	31 Jul 2021, 03:48 PM	PO-000002	Loom	Supplycart (PG-06B)	Conrad	N/A	N/A	STSB/PR/21/00009	Approved	View
12	24 May 2021, 05:13 PM	PO-000001	Apple South Asia PTE Ltd	Supplycart (PG-02)	Julian	Jonathan Oh	24 May 2021, 05:13 PM	STSB/PR/21/00002	Approved	View
1 - 12 of 12 First 1 Last Per Page 30										

Filter Purchase Orders

To filter the status of your Purchase Orders, click on the 'Filter by Status' tab and a list of statuses will appear.



Click on desired status and it would show the list of Purchase Orders with the selected status.

Search		Approved X		1 - 30 of 47		First	1	2	Last	Per Page 30	Display All	Display
#	Generated At	PO Ref No	Vendor	Status	Action							
1	30 Jul 2021, 11:44 PM	PO-000046	MM IT GROUP SDN. BHD.	Approved	View							
2	27 Jul 2021, 12:36 PM	PO-000045	Iverson Associates Sdn Bhd	Approved	View							
3	17 Jul 2021, 12:42 AM	PO-000044	Lazada Malaysia	Approved	View							
4	15 Jul 2021, 04:31 PM	PO-000043	Lazada Malaysia	Approved	View							
5	10 Jul 2021, 02:45 PM	PO-000042	Dreamz Enterprise Sdn Bhd	Approved	View							