| User Guide	ADAM-REQ-GUI-PO_AMMENDMENT_CLOSING-v1.0

Further Action on Approved POs

Editing POs

Approved POs can be edited to change the non-commerical dimensions of a PO. This does not require re-submission for approvals

Activating the Feature:

The feature to edit Approved POs is controlled by the Admin and can be activated by the steps below.
Note: The Permission to Edit a PO will be assigned to a Role via the 'Settings > Role Permissions' page. Please refer to the Roles & Permissions guide for further details.

Step 1: Under Purchase Order, click 'Settings'
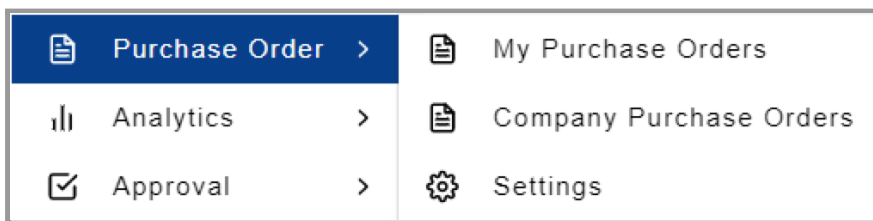
Step 2: Click on 'Enable Edit PO' to activate the feature
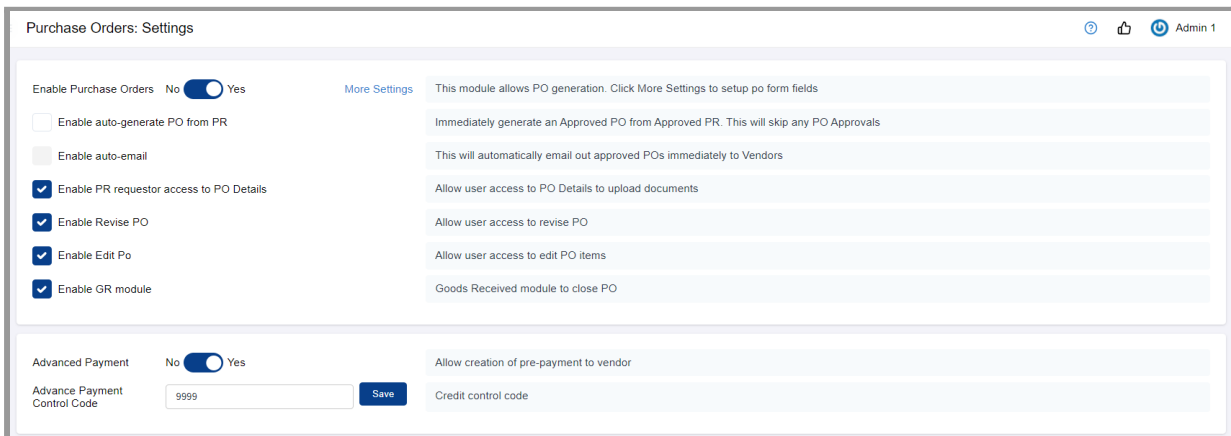
Editing Approved POs:

Step 1: Select the relevant PO to be edited
The PO can be accessed by any of the following pages:
- Purchase Orders > My Purchase Orders
- Purchase Orders > Company Purchase Orders
- Approvals > Approval Purchase Orders
- Approvals > Approval Purchase requisitions
- Requisitions > Company Requisition
- Requisitions > My Requisitions

Step 3: Select the Items to be Edited
You may select more than one item at a time

Step 4: Click on 'Edit'
This will prompt a pop up to show select item(s)'s dimensions

Step 5: Select the correct Dimension to be edited for each item

Step 6: Click 'Save'
This will result in the Dimension being updated for the Item
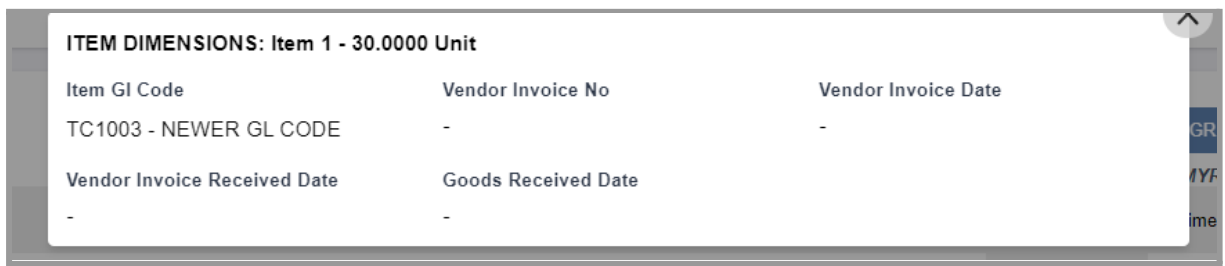
Item Name	Uom	GL Code	
Item 1	Unit	TC1003 - NEWER GL CODE	✖
Item 2	Pack	TC1002 - Equipment GL CODE	✖

Save Cancel

Step 7: Review the updated Dimensions
Click on the 'Info' button next to the Item to review the dimensions for each item

ITEM DIMENSIONS: Item 1 - 30.0000 Unit

Item Gl Code	Vendor Invoice No	Vendor Invoice Date
TC1003 - NEWER GL CODE	-	-

Vendor Invoice Received Date	Goods Received Date
-	-

Revising POs

Approved POs can be revised to update the commercial details on the PO. This will require a re-submission of the PO for approvals again
**Note:** PO Revision will be disabled for any PO that already has had a confirmed commercial commitment
(i.e, Any Advance Payment, Goods Received, or 'Closing' performed will disable the PO Revision)

Activating the Feature:

The feature to Revised Approved POs is controlled by the Admin and can be activated by the steps below.
Note: The Permission to Revise a PO will be assigned to a Role via the 'Settings > Role Permissions' page. Please refer to the Roles & Permissions guide for further details.

Step 1: Under Purchase Order, click 'Settings'
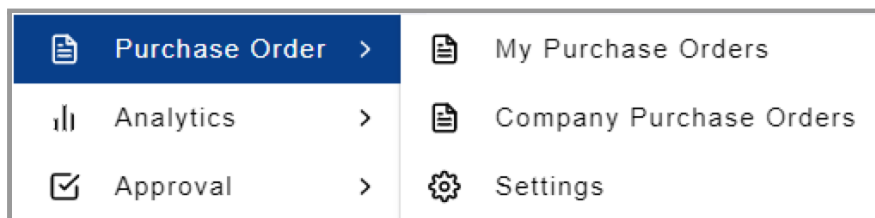
Step 2: Click on 'Enable Revise PO' to activate the feature
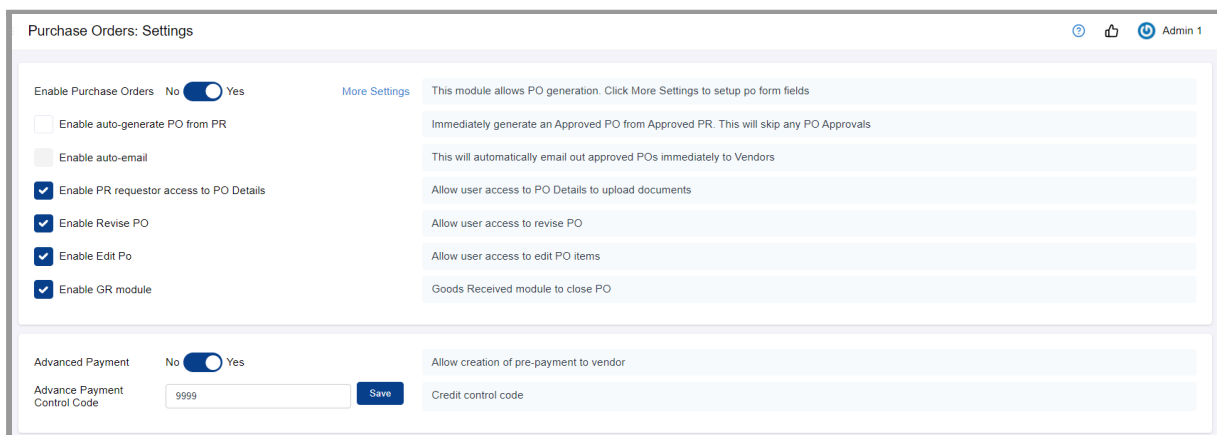
Revising Approved POs:

Step 1: Select the relevant PO to be revised
The PO can be accessed by any of the following pages:
- Purchase Orders > My Purchase Orders
- Purchase Orders > Company Purchase Orders
- Approvals > Approval Purchase Orders
- Approvals > Approval Purchase requisitions
- Requisitions > Company Requisition
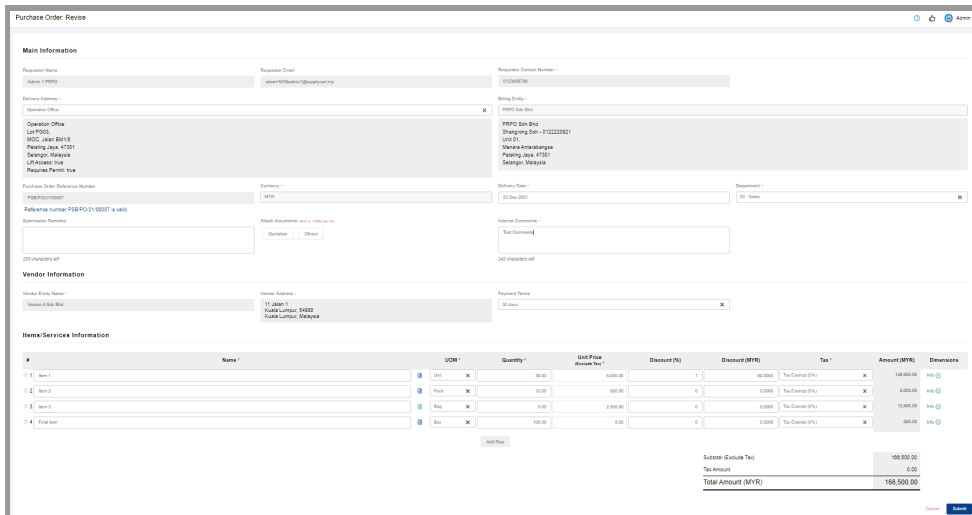- Requisitions > My Requisitions

Step 3: Click on 'Revise'
This will redirect you to the PO Form page with the information of the latest version pre-filled for your action

Step 4: Complete the PO form & Click 'Submit'
This will revise the PO & submit for the PO approval process

Step 5: Upon submission, the updated PO details will be populated on the PO Details page

Viewing Previous PO Versions:

Step 1: Select the relevant PO
The PO can be accessed by any of the following pages:
- Purchase Orders > My Purchase Orders
- Purchase Orders > Company Purchase Orders
- Approvals > Approval Purchase Orders
- Approvals > Approval Purchase requisitions
- Requisitions > Company Requisition
- Requisitions > My Requisitions

Step 2: Select the relevant version to view
This will display the PO details of the previous PO version
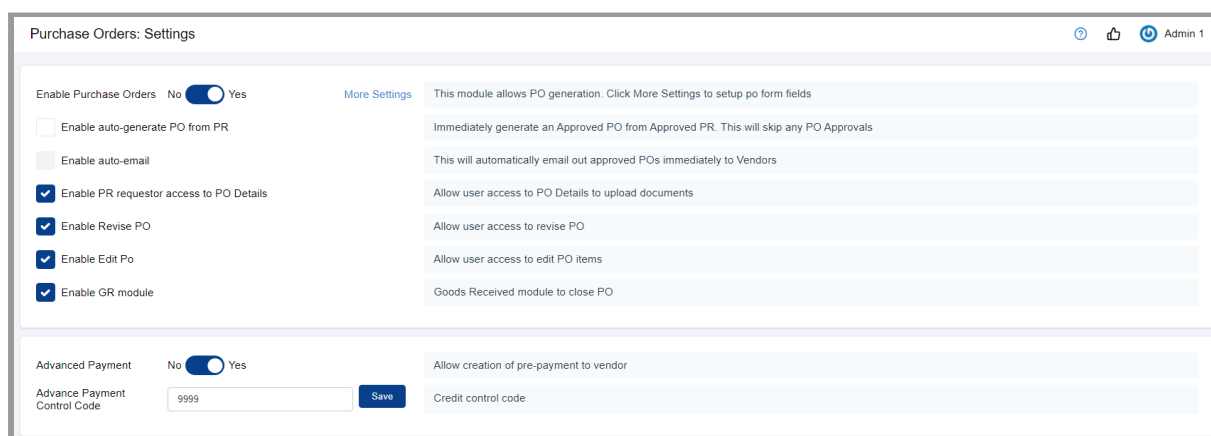
Advanced Payments

Activating the Feature:

The feature to create Advance Payments is controlled by the Admin and can be activated by the steps below.

Note: The Permission to create and download Advance Payments will be assigned to a Role via the 'Settings > Role Permissions' page. Please refer to the Roles & Permissions guide for further details.
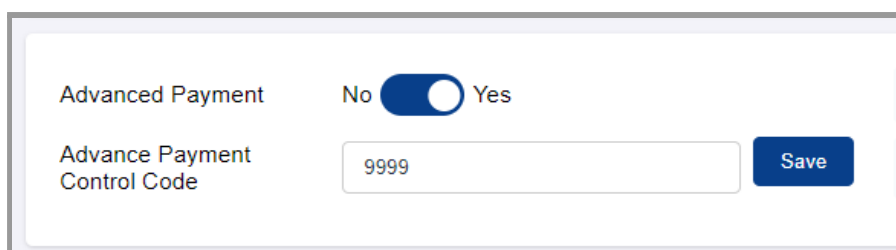
Step 1: Under Purchase Order, click 'Settings'
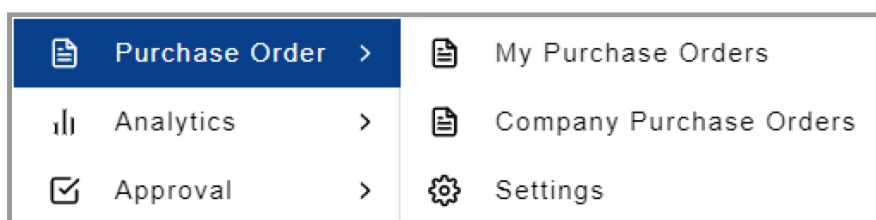
Step 2: Toggle the 'Advanced Payment' to 'Yes' to activate the feature

Step 3: Input the Credit Control Code
This code will be used to create a corresponding Credit Entry when an Advance Payment Debit Entry is made

Creating Advanced Payments:

Step 1: Select the relevant PO

The PO can be accessed by any of the following pages:
- Purchase Orders > My Purchase Orders
- Purchase Orders > Company Purchase Orders
- Approvals > Approval Purchase Orders
- Approvals > Approval Purchase requisitions
- Requisitions > Company Requisition
- Requisitions > My Requisitions

Step 2: Select the item to make an Advanced Payment

Click on the " 🖃 " icon to create a Advanced Payment for the relevant item

Step 3: Input the relevant information to make payment

Note: Compulsory fields are marked with an asterisk

Step 4: Click on 'Next' to proceed

Step 5: Click 'Confirm' to confirm the details of the Advance Payment

This will result in an 'Advance Payment' record being created in
1. The PO Details page
2. ADAM's Advance Payment page

Advance Payments

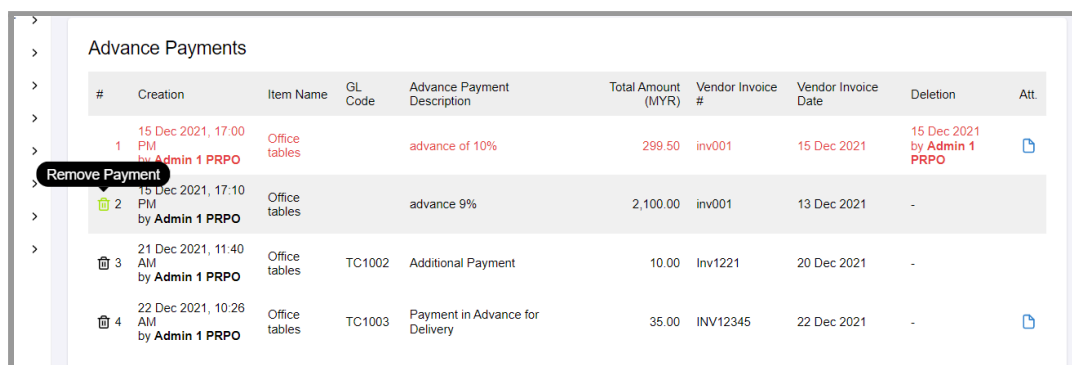| #	Creation	Item Name	GL Code	Advance Payment Description	Total Amount (MYR)	Vendor Invoice #	Vendor Invoice Date	Deletion	Att.
1	15 Dec 2021, 17:00 PM by **Admin 1 PRPO**	Office tables		advance of 10%	299.50	inv001	15 Dec 2021	15 Dec 2021 by **Admin 1 PRPO**	📄
2	15 Dec 2021, 17:10 PM by **Admin 1 PRPO**	Office tables		advance 9%	2,100.00	inv001	13 Dec 2021	-	
3	21 Dec 2021, 11:40 AM by **Admin 1 PRPO**	Office tables	TC1002	Additional Payment	10.00	Inv1221	20 Dec 2021	-	
4	22 Dec 2021, 10:26 AM by **Admin 1 PRPO**	Office tables	TC1003	Payment in Advance for Delivery	35.00	INV12345	22 Dec 2021	-	📄

Deleting Advance Payments:

For Advance Payments that were mistakenly created, you may delete them via the PO Details page

Step 1: Select the relevant PO

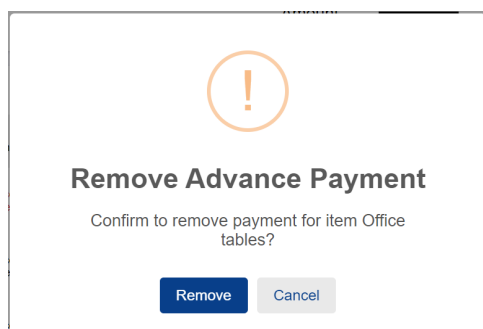The PO can be accessed by any of the following pages:
- Purchase Orders > My Purchase Orders
- Purchase Orders > Company Purchase Orders
- Approvals > Approval Purchase Orders
- Approvals > Approval Purchase requisitions
- Requisitions > Company Requisition

Step 2: Click on the " 🗑 " icon to delete an Advance Payment entry

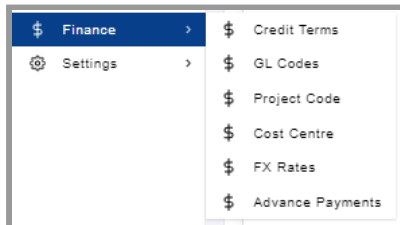**Step 3:** Click 'Remove' to confirm the deletion

This will result in the entry being marked as 'deleted' at:
1. The PO Details page
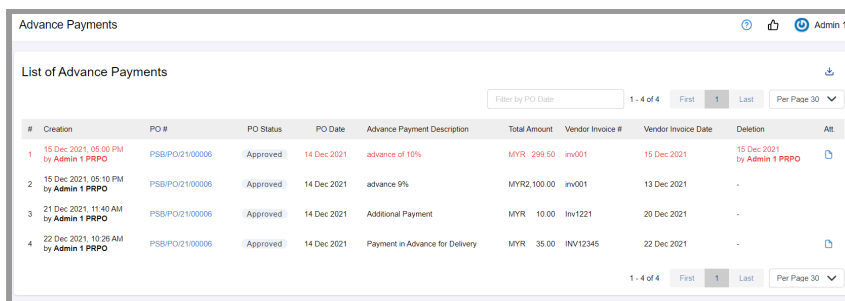2. The Advance Payment page

Downloading Advance Payment CSV:

Advance Payment entries in ADAM can be downloaded for upload into your Accounting System via the ADAM > Finance > Advance Payments page

Step 1: Under Finance, click 'Advance Payments'

Step 2: Under Finance, click 'Advance Payments'
This will take you to a page displaying all Advance Payment entries that have been maintained

Step 3: Filter the date range
This will filter the list of Advance Payment entries by the PO Date range

Step 4: Download the Advance Payment CSV
The filtered entries will be download into an Advance Payment CSV
Note: Deleted entries will not be included in this CSV
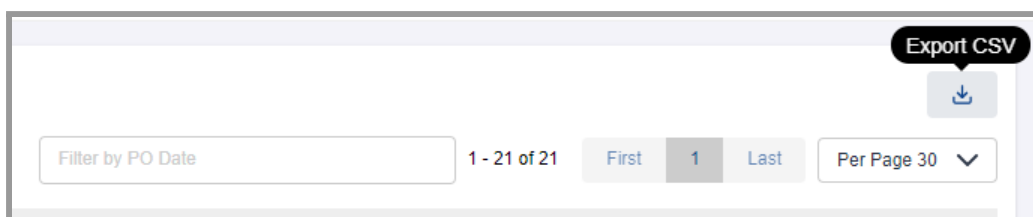
Performing GR to Close a PO

This section allows you to close POs by performing a Goods Received (GR)

Activating the Feature:

The feature to activate the GR module is controlled by the Admin and can be activated by the steps below.
Note: The Permission to Revise a PO will be assigned to a Role via the 'Settings > Role Permissions' page. Please refer to the Roles & Permissions guide for further details.

Step 1: Under Purchase Order, click 'Settings'
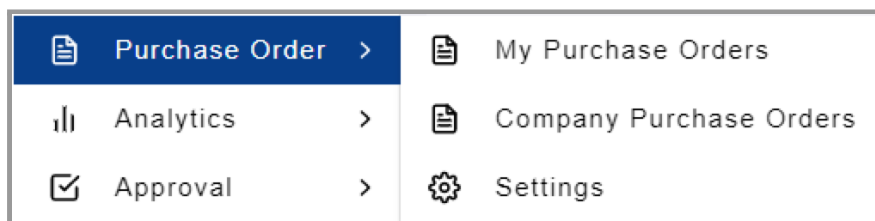
Step 2: Click on 'Enable GR Module' to activate the feature
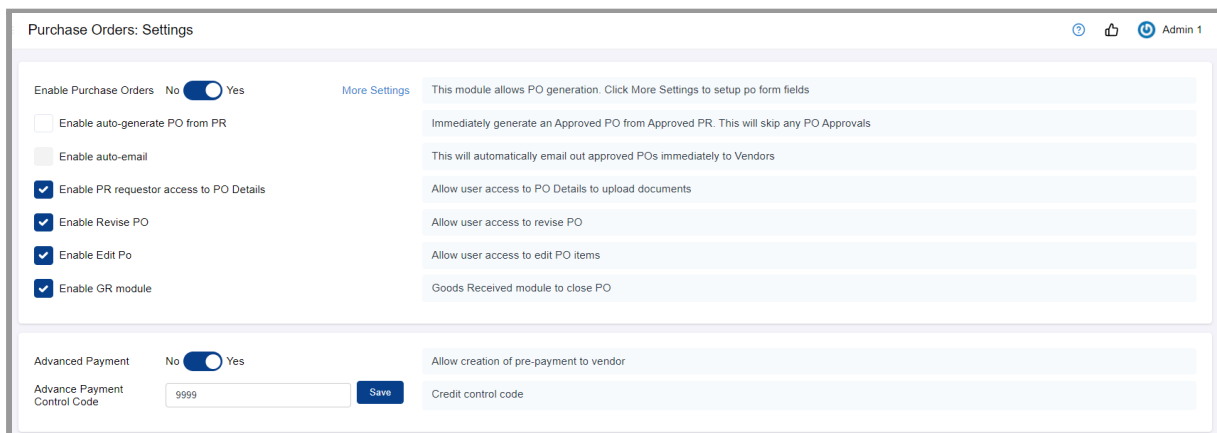
Performing GR on Approved POs:

Step 1: Select the relevant PO to be marked as 'Received'
The PO can be accessed by any of the following pages:
- Purchase Orders > My Purchase Orders
- Purchase Orders > Company Purchase Orders
- Approvals > Approval Purchase Orders
- Approvals > Approval Purchase requisitions
- Requisitions > Company Requisition
- Requisitions > My Requisitions

Step 2: Upload the GRN & Invoice
At the 'Attachments' section, upload the supplier invoice and GRN (or signed DN) as backing documents to confirm receipt of the PO items

Step 3: Select the Items to be marked as 'Received'
You may select more than one item at a time

Step 4: Click on 'GR Items'

This will prompt a pop up to confirm receipt of the selected item(s)

Step 5: Input the relevant Supplier Invoice & Delivery details

Step 6: Click on 'Next' to proceed

Step 7: Click 'Save' to save the details of the Goods Received for future review

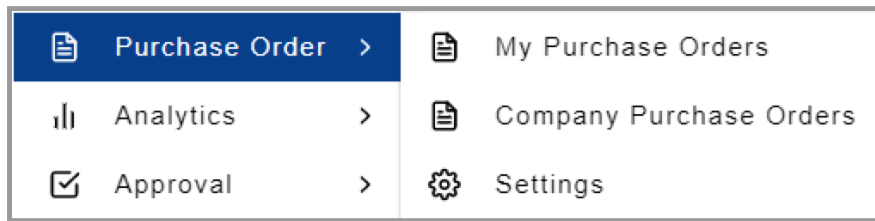**Note:** If you wish to confirm directly, you may proceed to Step 8

Reviewing & Confirming GRs:

Step 1: Under Purchase Order, click 'Company Purchase Orders'

Step 2: Identify the PO with GR pending my review
Note: POs with GR pending review are marked with a red exclamation mark

Step 3: Identify items for Review
Items that have a GR saved, but not confirmed will be marked with a red exclamation mark

Step 4: Select items to be reviewed

Select the Item and click on 'GR Items'. This will result in a popup displaying the saved GR information

Step 5: Click on 'Edit' if the GR needs to be corrected

Select the Item and click on 'GR Items'. This will result in a popup displaying the saved GR information for editing. Click on 'Next' to save the amended GR information

Step 6: Close the item by confirming the GR

Click on 'Confirm' to mark the item as fully received

Note: Upon closure of all items in a PO, the PO status will be updated as 'Closed'