ADAM
PROCUREMENT MADE EASY

PROCUREMENT READINESS CHECKLIST

E-Invoice & Procurement Readiness Checklist

7 checks before your next supplier invoice reaches finance.

PURPOSE

Use this checklist to review the procurement process behind every invoice, identify where your team is ready, and find where workflow control may need improvement before invoice pressure increases.

Introduction

Malaysia's e-Invoice mandate is often treated as a finance, tax or accounting project. But the purchasing decision happens long before the invoice reaches finance.

Someone requested the purchase. Someone approved it. A supplier was selected. A quotation may have been reviewed. A purchase order may have been issued. Goods or services may already have been delivered.

If those earlier steps are managed through email, Excel, WhatsApp, shared folders or manual follow-ups, finance may only discover the gaps when the invoice arrives.

As Malaysia's e-Invoice rollout continues — including the staged implementation for taxpayers with annual turnover or revenue of up to RM5 million from 1 January 2026 — many growing businesses have a timely reason to review the process behind every invoice.

Scope note. This checklist describes procurement-readiness good practice. It is not a technical e-Invoice compliance checklist and it is not a product capability checklist for ADAM-Procure. It does not assess MyInvois submission, LHDN validation, tax filing, e-Invoice API integration or compliance configuration. Those areas should be reviewed separately with your finance, tax, accounting or system teams.

Who should use this checklist

- Procurement managers who need cleaner supplier, quotation and PO processes
- CFOs and finance leaders who want better purchasing context before invoices arrive
- Operations leaders who want fewer approval delays and less manual chasing
- Managing directors who want better visibility over purchasing activity
- Finance and admin teams preparing internal processes for e-Invoice readiness
- Growing businesses that have outgrown email and Excel-based procurement

How to use it

1. **Read "what good looks like".** The practical standard for each area.
2. **Tick the gaps.** Mark every statement in "where you may have gaps" that is true for you.
3. **Rate the check.** Use the number of gaps ticked to mark it Green, Amber or Red.

GREEN	AMBER	RED
0–1 gaps	2–3 gaps	4+ gaps

THE SEVEN CHECKS

Work through each area

1

READINESS CHECK 1

Supplier records

Are your supplier records complete, current and easy to access?

Supplier information is one of the foundations of e-Invoice readiness. If supplier records are incomplete, duplicated or stored across different systems, finance and procurement teams may spend unnecessary time checking, chasing and correcting information.

WHAT GOOD LOOKS LIKE

- ✓ The supplier's registered business name is easy to confirm
- ✓ Company registration details are available
- ✓ Tax identification details are available
- ✓ Current contact information is maintained
- ✓ Required supplier onboarding documents are accessible
- ✓ Supplier approval status is clear
- ✓ Related agreements or commercial records are accessible where maintained
- ✓ Someone owns supplier data quality and updates
- ✓ Potential duplicate supplier records are flagged for review

WHERE YOU MAY HAVE GAPS

- ☐ Supplier information is stored in multiple spreadsheets
- ☐ Different departments maintain their own supplier lists
- ☐ Finance and procurement rely on different versions of supplier data
- ☐ Supplier documents are kept in individual inboxes
- ☐ Supplier payment-detail changes happen outside a clear finance-approved control process
- ☐ Potential duplicate supplier records are only discovered by chance
- ☐ Nobody clearly owns supplier data quality

YOUR RATING

○ Ready	○ Needs improvement	○ High risk
Green · 0–1 gaps	Amber · 2–3 gaps	Red · 4+ gaps

RECOMMENDED IMPROVEMENT

Create a single, controlled supplier record that procurement and finance can trust. Define who can create, verify, update and approve supplier information, including how payment-detail changes should be checked through your internal finance controls.

READINESS CHECK 2

2 Purchase requests

Are purchase requests structured before they become supplier commitments?

Many invoice issues begin at the request stage. If purchase requests are vague or incomplete, the team may not have enough information later to confirm whether the invoice matches what was requested, approved and ordered.

WHAT GOOD LOOKS LIKE

- ✓ What is being purchased is clearly stated
- ✓ Why it is needed is explained
- ✓ Requesting department or cost centre is captured
- ✓ Estimated amount is included
- ✓ Preferred or selected supplier is identified where known
- ✓ Supporting quotation or document is attached where applicable
- ✓ Required delivery date is stated
- ✓ Budget owner or approver is clear
- ✓ Approval pathway is visible
- ✓ PO requirement is understood

WHERE YOU MAY HAVE GAPS

- ☐ Staff submit purchase requests by email or chat message
- ☐ Finance only sees the purchase after the invoice arrives
- ☐ Supporting documents are added later or not at all
- ☐ Managers approve requests without enough context
- ☐ Requests are difficult to search or retrieve
- ☐ Different teams use different request formats
- ☐ Urgent requests often bypass the normal process

YOUR RATING

○ Ready	○ Needs improvement	○ High risk
Green · 0–1 gaps	Amber · 2–3 gaps	Red · 4+ gaps

RECOMMENDED IMPROVEMENT

Standardise purchase request forms so the right information is captured at the start. This reduces follow-up later and helps procurement and finance understand the transaction before the invoice stage.

3

READINESS CHECK 3

Approval workflows

Can you prove who approved what, when and why?

Approval control is one of the most important parts of procurement readiness. If approvals are handled through emails, messages or informal conversations, it becomes difficult to trace who authorised a purchase and whether the correct approval process was followed.

WHAT GOOD LOOKS LIKE

- ✓ The right approver can be identified
- ✓ Approval date and status are visible
- ✓ Approval thresholds are documented
- ✓ Approval follows department, category, project or value rules where applicable
- ✓ Approvers receive enough supporting information
- ✓ Supplier approval status is considered before proceeding
- ✓ Exceptions are documented when they occur
- ✓ The approval trail is retrievable

WHERE YOU MAY HAVE GAPS

- ☐ Approvals are chased manually
- ☐ The founder, owner or managing director approves too many routine purchases
- ☐ Approval rules are unclear or inconsistent
- ☐ Approvers use email, WhatsApp or verbal confirmation
- ☐ Finance often has to ask who approved a purchase
- ☐ Purchase approvals are difficult to audit
- ☐ Teams bypass the process when purchases are urgent

YOUR RATING

◯ Ready	◯ Needs improvement	◯ High risk
Green · 0–1 gaps	Amber · 2–3 gaps	Red · 4+ gaps

RECOMMENDED IMPROVEMENT

Build clear approval workflows based on spend threshold, department, category, location, project or budget owner. Every approval should be visible, traceable and linked to the original request.

4

READINESS CHECK 4

Purchase orders

Are you reviewing approved purchases and PO values before the invoice arrives?

A purchase order creates a clearer link between what was approved, what was ordered and what is later invoiced. If POs are inconsistent or issued late, finance may only get full context when the invoice arrives, making the business reactive rather than controlled.

WHAT GOOD LOOKS LIKE

- ✓ The team knows when a PO is required
- ✓ POs are issued before supplier delivery where the process requires it
- ✓ PO numbers are communicated to suppliers where applicable
- ✓ Invoices can be checked against POs or supporting purchasing records
- ✓ Non-PO invoices have a clear internal review path
- ✓ Finance can access approved purchases or PO values before the invoice stage
- ✓ PO status is easy to check
- ✓ Departments follow the same PO discipline

WHERE YOU MAY HAVE GAPS

- ☐ Suppliers invoice without PO numbers where a PO is expected
- ☐ POs are issued after goods or services are delivered
- ☐ Finance manually asks procurement or operations for PO confirmation
- ☐ Purchase orders are tracked in spreadsheets
- ☐ Non-PO invoices are handled ad hoc
- ☐ There is no clear view of approved purchasing activity before invoice arrival
- ☐ Invoice checking is mostly manual

YOUR RATING

- ○ **Ready** — Green · 0–1 gaps
- ○ **Needs improvement** — Amber · 2–3 gaps
- ○ **High risk** — Red · 4+ gaps

RECOMMENDED IMPROVEMENT

Strengthen PO discipline so approved purchases are easier to review before invoices arrive. This helps procurement and finance check invoice context faster and reduces avoidable manual investigation.

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READINESS CHECK 5

Supplier quotations & supporting documents

Can your team find the purchasing evidence behind each invoice?

When an invoice arrives, finance may need to check whether the amount matches what was agreed, whether the supplier was selected correctly, and whether the purchase was properly approved. If supporting documents are scattered, this becomes a manual chase.

WHAT GOOD LOOKS LIKE

- ✓ Supplier quotations are easy to retrieve
- ✓ Supplier responses are stored with the relevant purchasing record
- ✓ Evaluation remarks or award rationale are accessible where applicable
- ✓ Tender or quotation submissions are organised
- ✓ Approval records are linked or easy to locate
- ✓ Purchase orders are available
- ✓ Receiving or delivery confirmations are available where used
- ✓ Related agreements or commercial records are accessible where maintained
- ✓ Invoice-supporting documents are easy to find

WHERE YOU MAY HAVE GAPS

- ☐ Supplier quotes are buried in email threads
- ☐ Different versions of quotations are difficult to track
- ☐ Attachments are stored in personal inboxes
- ☐ Procurement and finance use different records
- ☐ Supplier comparison is mostly informal or manual
- ☐ Award rationale is hard to retrieve later
- ☐ Supporting documents are requested only after invoice arrival

YOUR RATING

○ Ready	○ Needs improvement	○ High risk
Green · 0–1 gaps	Amber · 2–3 gaps	Red · 4+ gaps

RECOMMENDED IMPROVEMENT

Keep supplier quotations, approvals and supporting documents organised in one structured process. This makes invoice checking faster and strengthens the procurement audit trail.

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READINESS CHECK 6

Invoice discrepancies

Can your team identify and investigate invoice issues quickly?

Even with good processes, invoice issues can happen. A supplier may use incorrect details, the amount may not match what was agreed, the quantity may differ, the PO number may be missing, or supporting documents may be hard to locate. The key question is how quickly your team can identify and investigate the issue.

WHAT GOOD LOOKS LIKE

- ✓ Incorrect supplier details can be checked quickly
- ✓ Incorrect buyer details can be checked quickly
- ✓ Mismatched amounts can be compared against supporting records
- ✓ Quantity or pricing differences can be investigated
- ✓ Missing PO numbers can be followed up using a clear process
- ✓ Missing supporting documents can be located or requested
- ✓ Potential duplicate invoices can be reviewed before payment
- ✓ Incorrect tax details can be raised through the right finance/tax process
- ✓ Non-PO invoices have a defined internal review path

WHERE YOU MAY HAVE GAPS

- ☐ Finance manually checks invoices against emails or spreadsheets
- ☐ Invoice discrepancies require several people to investigate
- ☐ Supporting documents are difficult to find
- ☐ Supplier corrections take too long
- ☐ Discrepancies are discovered late
- ☐ Potential duplicate invoices are difficult to review
- ☐ There is no clear internal review process for invoice discrepancies

YOUR RATING

○ Ready	○ Needs improvement	○ High risk
Green · 0–1 gaps	Amber · 2–3 gaps	Red · 4+ gaps

RECOMMENDED IMPROVEMENT

Create a clear discrepancy review process. Finance should know where to look for the request, approval, supplier record, quotation, PO and supporting documents without relying on manual chasing.

7

READINESS CHECK 7

Management visibility

Can leadership see approved purchasing activity before costs become invoices?

E-Invoice readiness should not only improve compliance. It should also give the business better control over purchasing. For growing organisations, leadership needs practical visibility before spend becomes an invoice.

WHAT GOOD LOOKS LIKE

- ✓ What has been requested is visible
- ✓ What has been approved is visible
- ✓ What has been ordered is visible
- ✓ Pending approvals are easy to identify
- ✓ Supplier usage can be reviewed
- ✓ Invoices can be linked to POs or supporting purchasing records where applicable
- ✓ Purchases requiring review are easy to identify
- ✓ Departments or cost centres driving purchasing activity can be reviewed
- ✓ Approved purchasing activity or PO values are visible before the invoice stage

WHERE YOU MAY HAVE GAPS

- ☐ Finance mainly gets purchasing visibility after invoices arrive
- ☐ Procurement status is difficult to see without manual updates
- ☐ Managers rely on manual updates
- ☐ Purchasing visibility is delayed
- ☐ Departments use their own tracking sheets
- ☐ There is no clear view from request to invoice
- ☐ Leadership only sees the problem after payment pressure appears

YOUR RATING

○ Ready	○ Needs improvement	○ High risk
Green · 0–1 gaps	Amber · 2–3 gaps	Red · 4+ gaps

RECOMMENDED IMPROVEMENT

Create practical visibility across purchase requests, approvals, POs, supplier records and invoice status. This helps leadership make better decisions before spend becomes harder to control.

YOUR RESULT

Your readiness score

This tally updates as you select a rating for each of the seven checks above.

0	0	0
Green — Ready	Amber — Needs improvement	Red — High risk

Reset all selections

How to interpret your score

Check your Red ratings first. Two or more Red checks set your priority regardless of the rest. If none are Red, use whether most checks are Green or Amber.

No Red, mostly Green

Your purchasing process is relatively well structured. Confirm that procurement, finance and system teams are aligned on supplier records, PO checking and document availability.

No Red, mostly Amber

You have some controls, but gaps remain. Prioritise where manual follow-up creates the most delay or risk — supplier records, approval workflows and PO discipline.

Two or more Red

You may face avoidable friction as e-Invoice becomes part of daily operations. Review the procurement process before the invoice stage and reduce reliance on manual tracking.

Quick priority matrix

Use your ratings to sequence the work. Fix the areas most likely to create delay and rework first, then improve and strengthen over time.

Fix first	Improve next	Strengthen over time
• Supplier records • Approval workflows • Purchase order discipline • Invoice discrepancy review	• Purchase request quality • Supplier quotation records • Supporting document retrieval • Management visibility	• Budget visibility • Supplier performance records • Review by department or cost centre • Procurement data analysis • Systems alignment with finance / ERP

What good looks like

A business with stronger e-Invoice and procurement readiness should be able to say:

- ✓ We know who our approved suppliers are.
- ✓ Purchase requests capture the right information upfront.
- ✓ POs are used consistently where required.
- ✓ Supplier quotations and supporting documents are easy to retrieve.
- ✓ Leadership has visibility into purchasing activity before payment pressure appears.
- ✓ Supplier records are complete, current and accessible.
- ✓ Approvals are visible and traceable.
- ✓ Finance can access purchasing context before invoices arrive.
- ✓ Invoice discrepancies can be identified and investigated through a clear process.
- ✓ Procurement is not dependent on email, Excel or individual staff knowledge.

If your business cannot say this yet, e-Invoice readiness is a good reason to improve the process now.

How ADAM-Procure helps

> **Positioning note.** ADAM-Procure is not positioned here as a MyInvois submission, LHDN validation or e-Invoice compliance filing tool. This checklist focuses on the procurement workflow that sits upstream of invoice processing.

ADAM-Procure helps growing organisations bring more structure to the procurement process before the invoice reaches finance. Instead of relying on email, Excel, WhatsApp and shared folders, teams can manage key procurement activities through a more visible and traceable workflow, including:

- Supplier records
- Purchase requests
- Approval workflows
- Supplier quotations & tenders
- Purchase orders
- Supporting procurement documents
- Visibility across the process

Procurement teams	Less manual chasing and clearer process control.
Finance teams	Better access to purchasing context before invoice handling.
Operations teams	A clearer way to raise and track requests.
Leadership	Better visibility over procurement activity as the business grows.

E-Invoice may be the trigger.
Better procurement control is the bigger opportunity.

Preparing for Malaysia's e-Invoice rollout?

Start with the procurement process behind every invoice. Use this checklist to assess your supplier records, purchase requests, approval workflows, PO discipline and supporting-document readiness. If you would like to review where your process may need better structure, request a procurement readiness conversation with ADAM-Procure.

https://adam-procure.com/contact-us/

Sources & further reading

LHDN / HASiL e-Invoice overview — hasil.gov.my/en/e-invoice

LHDN / HASiL e-Invoice implementation timeline — e-invoice-implementation-timeline

IRBM e-Invoice Guideline (PDF) — irbm-e-invoice-guideline.pdf

This checklist describes procurement-readiness good practice and is not tax, accounting or legal advice. For e-Invoice compliance, MyInvois submission and LHDN validation, consult your finance, tax or system teams. © Supplycart Technologies. ADAM-Procure.