

Sunward Portal Management System

DOCUMENT INFORMATION

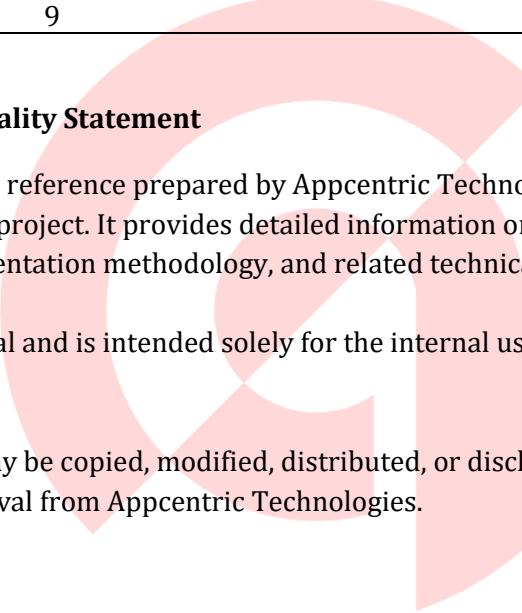
Prepared by	Appcentric Technologies
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Project Name	Sunward Portal Management System
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Module Name	Sales Order Module
Pages	9

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This document is a technical reference prepared by Appcentric Technologies for the Sunward Portal Management System project. It provides detailed information on the system architecture, technical approach, implementation methodology, and related technical specifications.

This document is confidential and is intended solely for the internal use of the authorized technical team of Sunward.

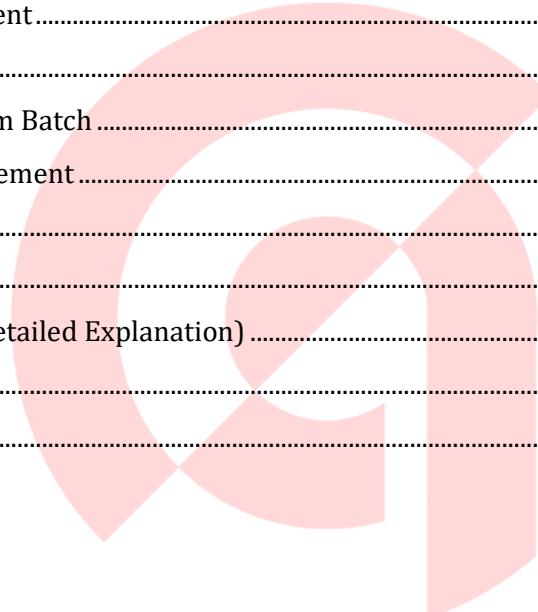
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Table of Contents

Sunward Portal Management System.....	1
1. Project Overview	3
2. Objectives	3
3. System Modules & Key Functions	3
4. Functional Components	4
4.1 Customer Type Management (UI)	4
4.2 Address Management.....	5
4.3 NAV Items Master	5
4.4 Master Pricing Item Batch	6
4.5 Sales Order Management	7
4.6 NAV Integration	7
Endpoints.....	8
5. Database Structure (Detailed Explanation)	8
6. Business Logic.....	8
8. Summary	9



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1. Project Overview

The Sales Order Module is a core component of the Sunward Portal, designed to manage the complete sales lifecycle—from customer registration to sales transaction processing and NAV-integrated item management. This module supports multiple customer types, including Clinics, Customers, and Vendors, and provides centralized management for address details, pricing structures, batch information, and item master synchronization with NAV systems (NAV_SG and NAV_JB).

2. Objectives

The primary objective of the Sales Order Module is to establish a centralized, structured, and reliable system for managing sales-related operations within the Sunward Portal. This module ensures consistent handling of customer records, sales documentation, item availability, pricing logic, and NAV-linked product information. By providing a unified platform, the system enhances data quality, operational efficiency, and traceability across all sales workflows.

3. System Modules & Key Functions

Module	Description	Key Users
Standardize Sales Operations	Provide a unified interface for creating, managing, and tracking Sales Orders across Clinics, Customers, and Vendors	All Users
Centralize Customer Data Management	Maintain consistent, validated, and easily retrievable customer master records, including billing and shipping addresses.	All Users
Ensure Accurate Pricing and Item Mapping	Support Master Pricing, Specific Item Pricing, and NAV item integration to guarantee accurate sales calculations	Administrator
Integrate Seamlessly with NAV Systems	Leverage OData and SOAP endpoints to sync NAV item details, pack sizes, FP descriptions, plant information, method codes, and other metadata.	All Users

4. Functional Components

The Sales Order Module consists of several interconnected submodules that collectively support the full sales cycle—including customer onboarding, pricing configuration, order creation, NAV item synchronization, and batch-level inventory validation. Each module has defined responsibilities and interacts with others to ensure a seamless sales workflow.

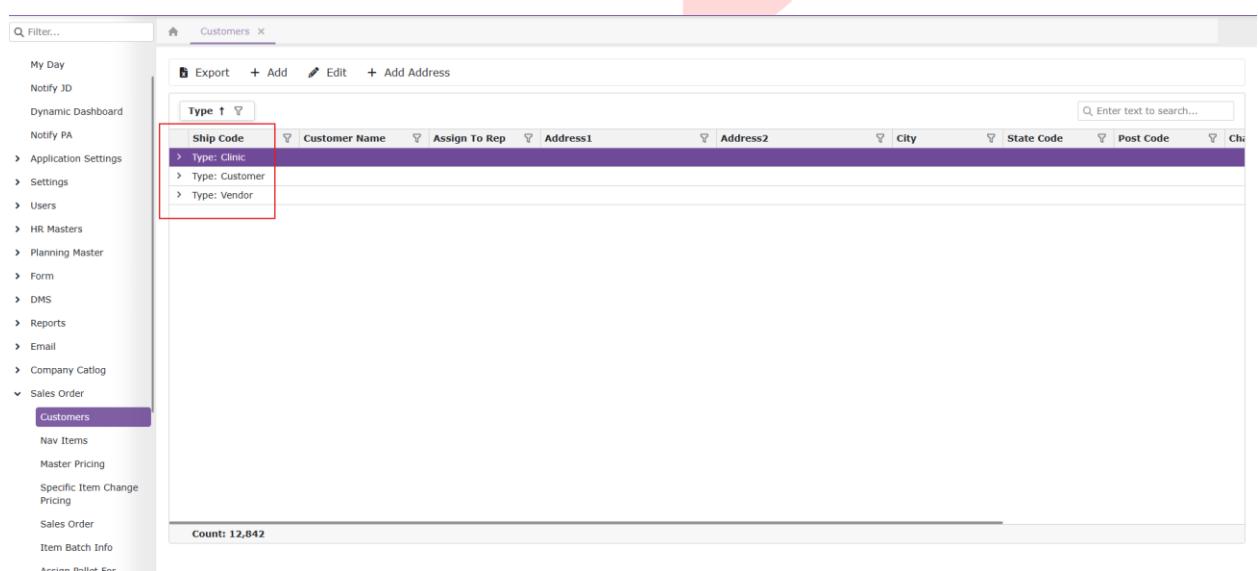
4.1 Customer Type Management (UI)

Modules:

- Clinic
- Customer
- Vendor

Key Functions:

- Create and manage customer profiles.
- Assign categories (Clinic, Customer, Vendor).
- Enable/disable customer records (status management).
- View customer history and linked Sales Orders.



The screenshot shows a software interface for managing customer types. On the left is a sidebar menu with various options like My Day, Notify JD, Dynamic Dashboard, etc. The main area is titled 'Customers' and contains a table with columns: Ship Code, Customer Name, Assign To Rep, Address1, Address2, City, State Code, Post Code, and Ch. A search bar at the top right says 'Enter text to search...'. Below the table, it says 'Count: 12,842'. A red box highlights the 'Ship Code' column header and the first three items in the dropdown menu: 'Type: Clinic', 'Type: Customer', and 'Type: Vendor'.

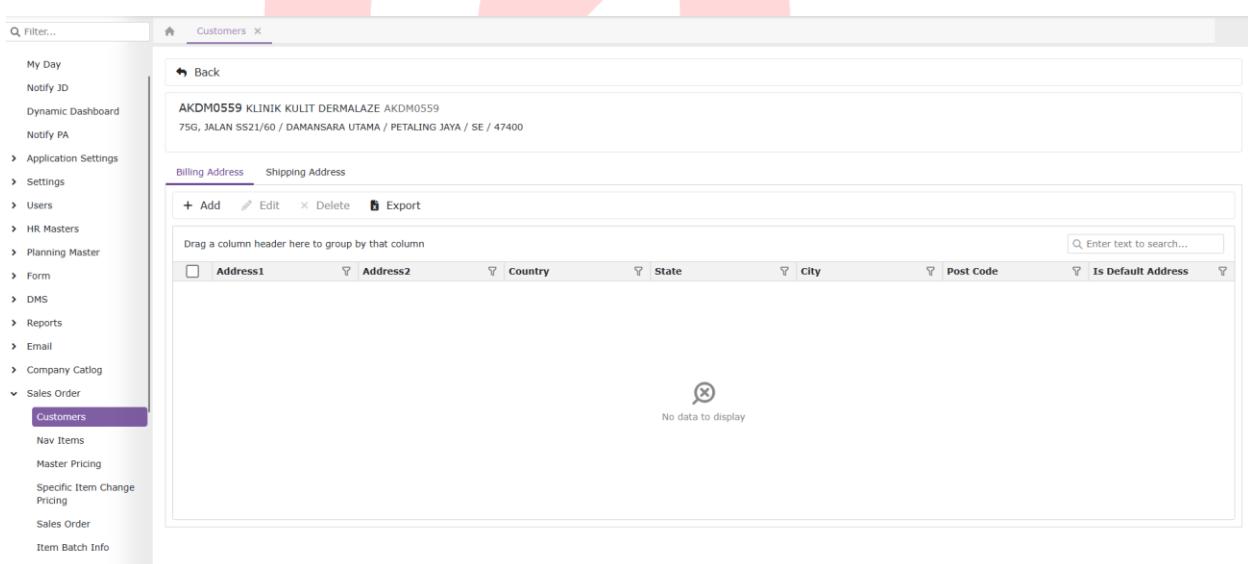
4.2 Address Management

Modules:

- Billing Address
- Shipping Address

Key Functions:

- Maintain multiple addresses per customer.
- Set default billing/shipping addresses.
- Validate mandatory address fields such as Country, State, Postcode, Route Code, Attention Person, and Contact Details.
- Address selection during Sales Order creation.



4.3 NAV Items Master

Key Functions:

- Sync item master details from NAV (NAV_SG and NAV_JB).
- Display item metadata including Pack Size, BUOM Name, FP Description, Generic Code, Plant, Method Code, and Steroid Classification.
- Maintain item status and visibility for sales ordering.
- Provide consistent item information across pricing and ordering workflows.

Filter... Customers X Nav Items X Master Pricing X

My Day Notify JD Dynamic Dashboard Notify PA Application Settings Settings Users HR Masters Planning Master Form DMS Reports Email Company Catalog Sales Order Customers Nav Items Master Pricing Specific Item Change Pricing Sales Order Item Batch Info American Dollar Enc.

Edit Export

Drag a column header here to group by that column Enter text to search...

Company	No	Description	Description2	Pack Size	Supply To	Uom	ItemSerialNo
SWSG	FP-IMP-TAB-002	Erzdase E.C. 5mg Tablets 1X10	CCPC				
SWSG	FP-IMP-TAB-003	Erzdase E.C. 5mg Tablets 10X10					113
SWSG	FP-NP-CAP-001	Consu Capsule 40X10	CC				
SWSG	FP-NP-CAP-003	Flucol Capsule 2X10	ALCARE				
SWSG	FP-NP-CAP-019	Semor Capsule 40X10	SENKON				
SWSG	FP-NP-CAP-028	Flucol Capsule 1X10	SIN DK				
SWSG	FP-NP-CAP-031	Diatrol Capsule 2X8	CC				
SWSG	FP-NP-CAP-032	Semor Capsule 1X10	SIN DK				
SWSG	FP-NP-CAP-033	Consu Capsule1X10	SIN TR/DK				
SWSG	FP-NP-CAP-034	Fonghi Capsule1X8	HUA TAI				
SWSG	FP-NP-CRM-001	Anti Urticaria Cream 15GM	CC				
SWSG	FP-NP-CRM-003	Anti-Fungal & White Spot Cream 15GM	LI TA SHEN				
SWSG	FP-NP-CRM-004	Anti-Fungal Cream 12X15GM	DAIRY FARM				
SWSG	FP-NP-CRM-005	Anti-Itch Cream 10GM	CC				
SWSG	FP-NP-CRM-006	Anti-Itch Cream 12X30GM	DAIRY FARM				
SWSG	FP-NP-CRM-008	Anti-Itch Cream 15GM	HUA TAI				

Count: 5,780

4.4 Master Pricing Item Batch

Key Functions:

- Manage price lists linked to customer types or specific customers.
- Support tiered pricing and special discount structures.
- Validate pricing rules during order creation.
- Maintain audit logs for pricing revisions.

Filter... Customers X Nav Items X Master Pricing X Specific Item Change Pricing X Sales Order X Item Batch Info X

My Day Notify JD Dynamic Dashboard Notify PA Application Settings Settings Users HR Masters Planning Master Form DMS Reports Email Company Catalog Sales Order Customers Nav Items Master Pricing Specific Item Change Pricing Sales Order Item Batch Info American Dollar Enc.

+ Add Edit Delete Export

Drag a column header here to group by that column Enter text to search...

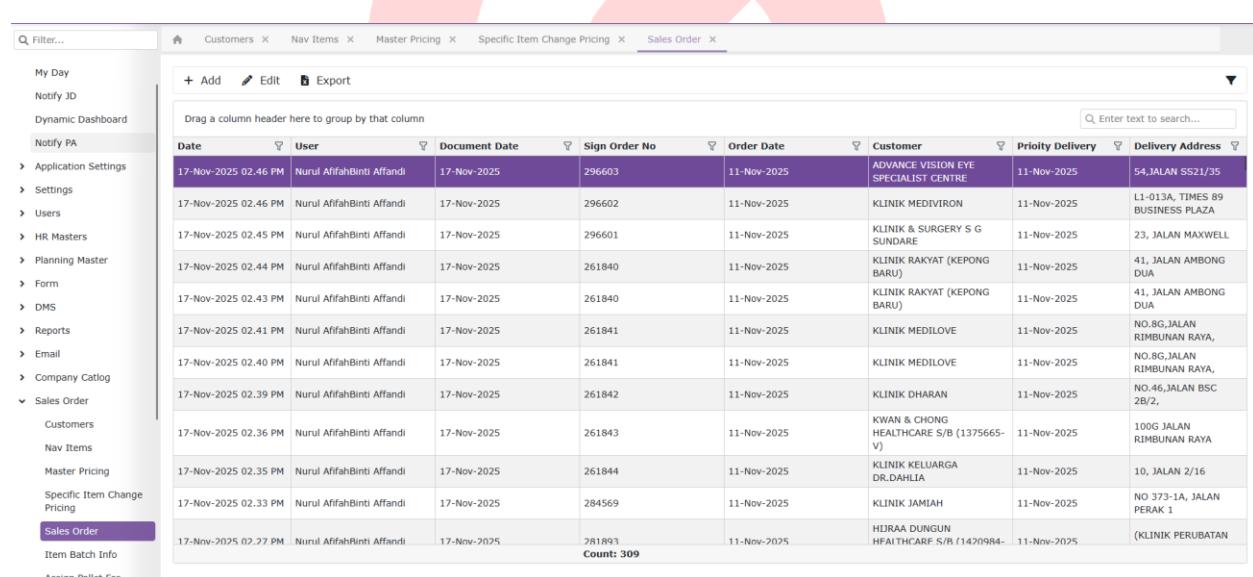
Company	Item No	Description	Location Code	Batch No	Expiry Date	Manufacture Date	Qty OnHand	Nav Qty	Issue Qty	Balance Qty	Stock Out Batch Confirm
SWMY	FP-DD-SYR-015	SW Methadone Syrup 60ML (G)	FP STORE	355-23009	31-May-2026	26-Jun-2023	0	6,928			
SWMY	FP-DD-TAB-002	Sun-Dianox Tablet 10X10X10	FP STORE	678-23005	30-Apr-2026	04-May-2023	0	90			
SWMY	FP-IMP-TAB-020	Glimin Tablet 2mg 15X2	FP STORE	T22204	10-Mar-2025	11-Mar-2022	0	24			
SWMY	FP-NP-CRM-001	Dicomet CZ Cream 12X50G	FP STORE	207-23012	30-Jun-2026	10-Jul-2023	0	122			
SWMY	FP-NP-CRM-004	Dicomet CZ Cream 12X50G	FP STORE	207-23011	30-Jun-2026	10-Jul-2023	0	121			
SWMY	FP-NP-CRM-005	Dicomet CZ Cream 50G	FP STORE	207-23010	30-Apr-2026	09-May-2023	0	8			
SWMY	FP-NP-CRM-017	SW Aqueous Cream 500G	FP STORE	200-23003	31-May-2026	12-Jun-2023	0	177			
SWMY	FP-NP-CRM-017	SW Aqueous Cream 500G	FP STORE	200-23002	31-May-2026	12-Jun-2023	0	170			
SWMY	FP-NP-CRM-017	SW Aqueous Cream 500G	FP STORE	200-23008	31-May-2026	15-Jun-2023	0	177			
SWMY	FP-NP-CRM-017	SW Aqueous Cream 500G	FP STORE	200-23007	31-May-2026	14-Jun-2023	0	178			

Count: 29,908

4.5 Sales Order Management

Key Functions:

- Create, edit, approve, and track Sales Orders.
- Auto-fill customer details and addresses.
- Apply Master or Specific Item Pricing.
- Validate item availability and NAV-linked metadata.
- Generate Sales Order numbers and maintain version control.
- Support status transitions (Draft → Submitted → Approved → Delivered).



The screenshot shows a software application interface for managing sales orders. The top navigation bar includes links for Customers, Nav Items, Master Pricing, Specific Item Change Pricing, and Sales Order. The left sidebar contains a navigation menu with items like My Day, Notify JD, Dynamic Dashboard, Notify PA, Application Settings, Settings, Users, HR Masters, Planning Master, Form, DMS, Reports, Email, Company Catalog, Sales Order, Customers, Nav Items, Master Pricing, Specific Item Change Pricing, Sales Order (which is selected and highlighted in purple), and Item Batch Info. A search bar at the top left says "Filter...". The main content area displays a table of sales orders with the following columns: Date, User, Document Date, Sign Order No, Order Date, Customer, Priority Delivery, and Delivery Address. The table lists 17 rows of data, with the last row showing a total count of 309. The "Sales Order" menu item in the sidebar is highlighted in purple, indicating it is the active section.

4.6 NAV Integration

Key Functions:

- Connect to NAV via OData and SOAP URLs.
- Retrieve item metadata dynamically and update local master tables.
- Ensure consistency between portal data and NAV ERP.
- Control access per NAV environment (SG / JB).

Endpoints

NAV_SG

OData: <http://jbnav.sunwardpharma.com:7548/DynamicsNAV100/OData>

SOAP: <http://jbnav.sunwardpharma.com:7547/DynamicsNAV100/WS>

NAV_JB

OData: <http://jbnav.sunwardpharma.com:7548/DynamicsNAV100/OData>

5. Database Structure (Detailed Explanation)

The Sales Order Module is supported by a set of relational database tables designed to maintain customer information, address data, item master details, pricing rules, batch information, and NAV cross-references.

This section outlines the recommended database structure, key fields, relationships, and technical details required for accurate and efficient data storage.

The database is normalized to support multi-customer environments, NAV integration, and scalable pricing/ordering logic

6. Business Logic

The Sales Order Module follows a structured workflow that ensures data accuracy, pricing integrity, regulatory compliance, and alignment with NAV item structures.

This section explains the complete business logic behind each master module and the sales order lifecycle—from customer creation to order confirmation and NAV validation.

Rules:

- Draft orders can be edited freely.
- Submitted orders require approval (role-based).
- Approved orders cannot modify pricing.
- Delivered orders become read-only.

Batch Selection Rules

- Item must have at least one valid batch.
- Batch must have:

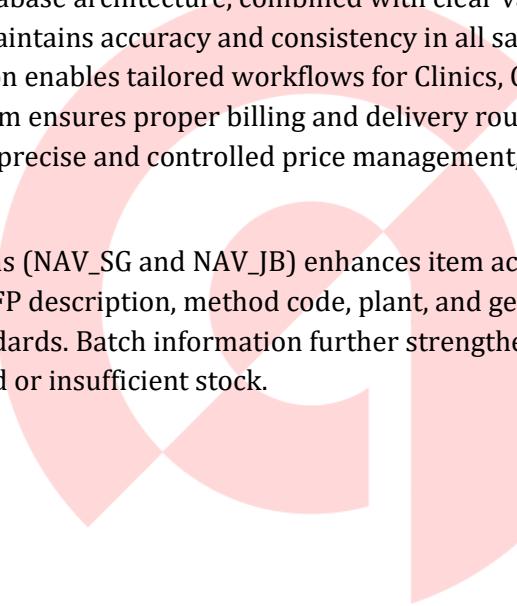
- AvailableQty > 0
- ExpiryDate > today

8. Summary

The Sales Order Module serves as a comprehensive, centralized framework for managing the end-to-end sales operations within the Sunward Portal. By integrating customer management, address records, pricing structures, NAV item metadata, and batch-level inventory information, the module ensures a seamless and efficient workflow for sales teams, administrators, and operational users.

The module's structured database architecture, combined with clear validation rules and automated business logic, maintains accuracy and consistency in all sales-related processes. Customer Type categorization enables tailored workflows for Clinics, Customers, and Vendors, while the dual-address system ensures proper billing and delivery routing. Master Pricing and Specific Item Pricing ensure precise and controlled price management, supported by detailed audit trails for compliance.

Integration with NAV systems (NAV_SG and NAV_JB) enhances item accuracy, ensuring that product metadata such as pack size, FP description, method code, plant, and generic classification remains synchronized with ERP standards. Batch information further strengthens order validity by preventing the use of expired or insufficient stock.



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