

# Sunward Portal Management System

## DOCUMENT INFORMATION

Prepared by	Appcentric Technologies
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Pages	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
<b>Standardize Sales Operations</b>	Provide a unified interface for creating, managing, and tracking Sales Orders across Clinics, Customers, and Vendors	All Users
<b>Centralize Customer Data Management</b>	Maintain consistent, validated, and easily retrievable customer master records, including billing and shipping addresses.	All Users
<b>Ensure Accurate Pricing and Item Mapping</b>	Support Master Pricing, Specific Item Pricing, and NAV item integration to guarantee accurate sales calculations	Administrator
<b>Integrate Seamlessly with NAV Systems</b>	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.

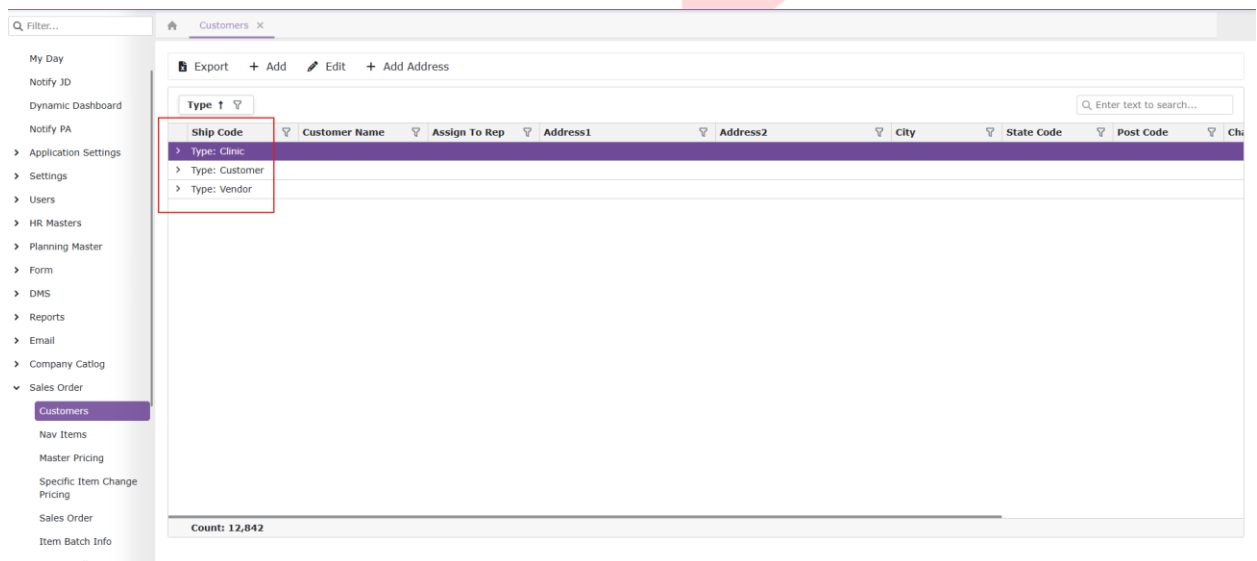
### 4.1 Customer Type Management (UI)

#### 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.



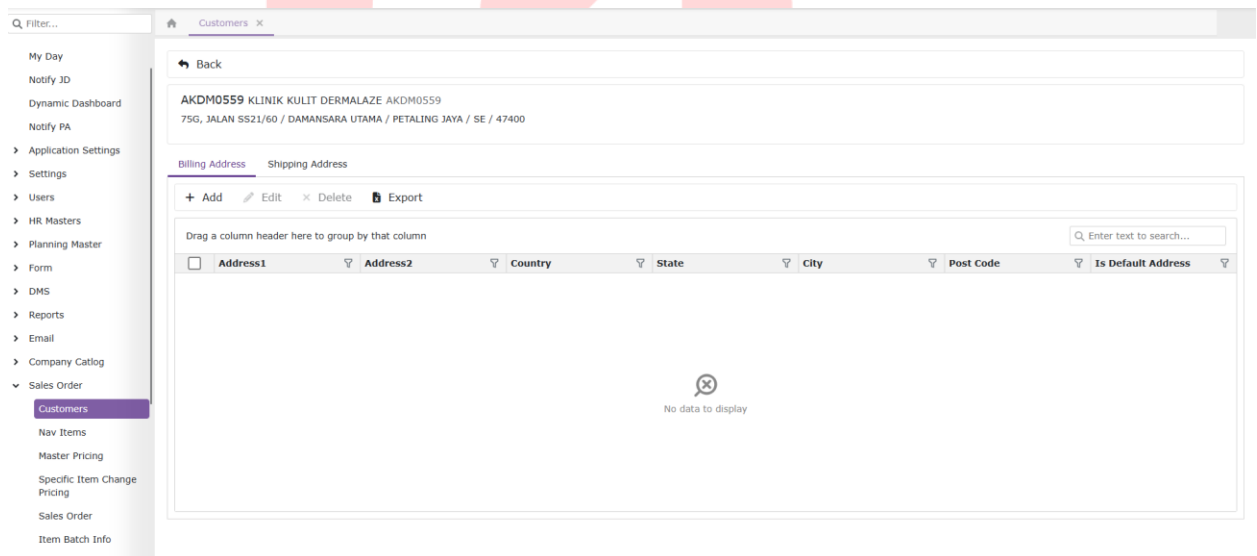
## 4.2 Address Management

### 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.

Q Filter...

Customers x Nav Items x Master Pricing x

Edit Export

Drag a column header here to group by that column

Q Enter text to search...

	Company	No	Description	Description2	Pack Size	Supply To	Uom	ItemSerialNo
<input checked="" type="checkbox"/>	SWSG	FP-IMP-TAB-002	Enzylase E.C. 5mg Tablets 1X10	CCPC				
<input type="checkbox"/>	SWSG	FP-IMP-TAB-003	Enzylase E.C. 5mg Tablets 10X10					113
<input type="checkbox"/>	SWSG	FP-NP-CAP-001	Consu Capsule 40X10	CC				
<input type="checkbox"/>	SWSG	FP-NP-CAP-003	Flucol Capsule 2X10	ALCARE				
<input type="checkbox"/>	SWSG	FP-NP-CAP-019	Semor Capsule 40X10	SENKON				
<input type="checkbox"/>	SWSG	FP-NP-CAP-028	Flucol Capsule 1X10	SIN DK				
<input type="checkbox"/>	SWSG	FP-NP-CAP-031	Diatrol Capsule 2X8	CC				
<input type="checkbox"/>	SWSG	FP-NP-CAP-032	Semor Capsule 1X10	SIN DK				
<input type="checkbox"/>	SWSG	FP-NP-CAP-033	Consu Capsule 1X10	SIN TR/DK				
<input type="checkbox"/>	SWSG	FP-NP-CAP-034	Fonghit Capsule 1X8	HUA TAI				
<input type="checkbox"/>	SWSG	FP-NP-CRM-001	Anti Urticaria Cream 15GM	CC				
<input type="checkbox"/>	SWSG	FP-NP-CRM-003	Anti-Fungal & White Spot Cream 15GM	LI TA SHEN				
<input type="checkbox"/>	SWSG	FP-NP-CRM-004	Anti-Fungal Cream 12X15GM	DAIRY FARM				
<input type="checkbox"/>	SWSG	FP-NP-CRM-005	Anti-Itch Cream 10GM	CC				
<input type="checkbox"/>	SWSG	FP-NP-CRM-006	Anti-Itch Cream 12X30GM	DAIRY FARM				
<input type="checkbox"/>	SWSG	FP-NP-CRM-008	Anti-Itch Cream 15GM	HUA TAI				
Count: 5,700								

My Day  
Notify JD  
Dynamic Dashboard  
Notify PA  
Application Settings  
Settings  
Users  
HR Masters  
Planning Master  
Form  
DMS  
Reports  
Email  
Company Catlog  
Sales Order  
Customers  
Nav Items  
Master Pricing  
Specific Item Change Pricing  
Sales Order  
Item Batch Info  
Action Detail Enr

## 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.

Q Filter...

Customers x Nav Items x Master Pricing x Specific Item Change Pricing x Sales Order x Item Batch Info x

+ Add Edit x Delete Export

Drag a column header here to group by that column

Q Enter text to search...

	Company	Item No	Description	Location Code	Batch No	Expiry Date	Manufact... Date	Qty OnHand	Nav Qty	Issue Qty	Balance Qty	Stock Out Batch Confirm
<input checked="" type="checkbox"/>	SWMY	FP-DD-SYR-015	SW Methadone Syrup 50ML (G)	FP STORE	355-23009	31-May-2026	26-Jun-2023	0	6,928			
<input type="checkbox"/>	SWMY	FP-DD-TAB-002	SUN-Dioron Tablet 10X10X10	FP STORE	678-23005	30-Apr-2026	04-May-2023	0	90			
<input type="checkbox"/>	SWMY	FP-IMP-TAB-020	Glimin Tablet 2mg 15X2	FP STORE	T22204	10-Mar-2025	11-Mar-2022	0	24			
<input type="checkbox"/>	SWMY	FP-NP-CRM-004	Dicomet CZ Cream 12X50G	FP STORE	207-23012	30-Jun-2026	10-Jul-2023	0	122			
<input type="checkbox"/>	SWMY	FP-NP-CRM-004	Dicomet CZ Cream 12X50G	FP STORE	207-23011	30-Jun-2026	10-Jul-2023	0	121			
<input type="checkbox"/>	SWMY	FP-NP-CRM-005	Dicomet CZ Cream 50G	FP STORE	207-23010	30-Apr-2026	09-May-2023	0	8			
<input type="checkbox"/>	SWMY	FP-NP-CRM-017	SW Aqueous Cream 500G	FP STORE	200-23003	31-May-2026	12-Jun-2023	0	177			
<input type="checkbox"/>	SWMY	FP-NP-CRM-017	SW Aqueous Cream 500G	FP STORE	200-23002	31-May-2026	12-Jun-2023	0	170			
<input type="checkbox"/>	SWMY	FP-NP-CRM-017	SW Aqueous Cream 500G	FP STORE	200-23008	31-May-2026	15-Jun-2023	0	177			
<input type="checkbox"/>	SWMY	FP-NP-CRM-017	SW Aqueous Cream 500G	FP STORE	200-23007	31-May-2026	14-Jun-2023	0	178			
Count: 29,908												

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

## 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).

Q Filter...

My Day

Notify JD

Dynamic Dashboard

Notify PA

Application Settings

Settings

Users

HR Masters

Planning Master

Form

DMS

Reports

Email

Company Catlog

Sales Order

Customers

Nav Items

Master Pricing

Specific Item Change Pricing

Sales Order

Item Batch Info

Customers

Nav Items

Master Pricing

Specific Item Change Pricing

Sales Order

+ Add

Edit

Export

Drag a column header here to group by that column

Q Enter text to search...

Date	User	Document Date	Sign Order No	Order Date	Customer	Priority Delivery	Delivery Address
17-Nov-2025 02:46 PM	Nurul AfifahBinti Affandi	17-Nov-2025	296603	11-Nov-2025	ADVANCE VISION EYE SPECIALIST CENTRE	11-Nov-2025	54,JALAN SS21/35
17-Nov-2025 02:46 PM	Nurul AfifahBinti Affandi	17-Nov-2025	296602	11-Nov-2025	KLINIK MEDIVIRON	11-Nov-2025	L1-013A, TIMES 89 BUSINESS PLAZA
17-Nov-2025 02:45 PM	Nurul AfifahBinti Affandi	17-Nov-2025	296601	11-Nov-2025	KLINIK & SURGERY S G SUNDARE	11-Nov-2025	23, JALAN MAXWELL
17-Nov-2025 02:44 PM	Nurul AfifahBinti Affandi	17-Nov-2025	261840	11-Nov-2025	KLINIK RAKYAT (KEPONG BARU)	11-Nov-2025	41, JALAN AMBONG DUA
17-Nov-2025 02:43 PM	Nurul AfifahBinti Affandi	17-Nov-2025	261840	11-Nov-2025	KLINIK RAKYAT (KEPONG BARU)	11-Nov-2025	41, JALAN AMBONG DUA
17-Nov-2025 02:41 PM	Nurul AfifahBinti Affandi	17-Nov-2025	261841	11-Nov-2025	KLINIK MEDILOVE	11-Nov-2025	NO.8G,JALAN RIMBUNAN RAYA,
17-Nov-2025 02:40 PM	Nurul AfifahBinti Affandi	17-Nov-2025	261841	11-Nov-2025	KLINIK MEDILOVE	11-Nov-2025	NO.8G,JALAN RIMBUNAN RAYA,
17-Nov-2025 02:39 PM	Nurul AfifahBinti Affandi	17-Nov-2025	261842	11-Nov-2025	KLINIK DHARAN	11-Nov-2025	NO.46,JALAN BSC 2B/2,
17-Nov-2025 02:36 PM	Nurul AfifahBinti Affandi	17-Nov-2025	261843	11-Nov-2025	K'WAN & CHONG HEALTHCARE S/B (1375665-V)	11-Nov-2025	100G JALAN RIMBUNAN RAYA
17-Nov-2025 02:35 PM	Nurul AfifahBinti Affandi	17-Nov-2025	261844	11-Nov-2025	KLINIK KELUARGA DR.DAHLIA	11-Nov-2025	10, JALAN 2/16
17-Nov-2025 02:33 PM	Nurul AfifahBinti Affandi	17-Nov-2025	284569	11-Nov-2025	KLINIK JAMIAH	11-Nov-2025	NO 373-1A, JALAN PERAK 1
17-Nov-2025 02:27 PM	Nurul AfifahBinti Affandi	17-Nov-2025	281893	11-Nov-2025	HJRAA DUNGUN HFAITHCARF S/B (1420984-	11-Nov-2025	(KLINIK PERUBATAN
			Count: 309				

## 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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