Utility Module

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Efam Departement Settings

Module Guide: EFAM Department Settings

Module Location

Utilities > EFAM Department Settings

Module Purpose

The EFAM Department Settings module is used to map or synchronize departments between the Sunfish system and the EFAM (Enterprise Financial & Asset Management) system or another relevant system. This module is essential for ensuring data integration across applications, particularly for reporting, approval workflows, or exporting data to external systems.

1. Main View (Sunfish to EFAM Department Mapping List)

View Explanation

- **Main Tabs**: There are two tabs: "Set Department" for mapping and "Set Alias Account" for other purposes (this document only covers the Set Department tab).
- **Mapping Table**:
  - **ID**: A unique department code from the other system (e.g., `00000`).
  - **Sunfish Dept.**: The department name or title in the Sunfish system (e.g., `MANAGING DIRECTOR`).

    - **EFAM Dept.**: A dropdown or selection field allowing the user to choose and save the mapping from a Sunfish department to the corresponding department in the EFAM system.

- Users can select the relevant EFAM department for each row, and the system saves the mapping to support integration.

2. Steps for Mapping EFAM Departments

- Navigate to **Utilities > EFAM Department Settings**, and ensure you are on the "Set Department" tab.
- The table will display a list of all departments from Sunfish along with their IDs.
- For each row, open the dropdown menu in the **EFAM Dept.** column and select the corresponding EFAM department.
- Save each mapping that has been selected or entered.
- This process ensures that any transaction or document involving a department can be correctly passed or consolidated between both systems.

3. Integrated Workflow & Business Process

- **Data Integration**: The EFAM Department mapping is used when it is necessary to export or integrate data between the Sunfish and EFAM systems, or with other external applications that require department references.

- **Approval Workflow**: In some scenarios, the system can use this department mapping to route documents between systems for approval schemes, consolidated reporting, and other functions.

4. Tips & Important Notes

- Ensure each mapping is performed with care to avoid inaccuracies in reporting or cross-application workflows.
- Review the mappings periodically, especially if there are changes to the organizational structure in either system.
- Access to this module should be granted only to system administrators or the IT division responsible for data integration and master data management.

Shelf Life Settings

Module Guide: Shelf Life Settings

Module Location

Utilities > Shelf Life Settings

Module Purpose

The **Shelf Life Settings** module is used to define the standard shelf life for various products or raw materials. This data serves as a critical parameter in inventory management, especially within an ERP system that requires quality control and stock rotation. By establishing a shelf life, the company can monitor and prevent the storage of expired goods.

1. Main View (Shelf Life List)

View Explanation

- **Shelf Life Table**:
  - **No.**: The sequence number for the shelf life entry.
  - **Shelf Life**: The registered shelf life value (e.g., entries like 300, 365, 360).
  - **Unit**: The time unit for the shelf life, which can be "Day" or "Month".

- This table displays a complete list of all registered shelf life parameters. Ideally, each entry will be used as a reference in the item master of the main system.

2. Add Shelf Life Page

View Explanation

- **Shelf Life**: A numeric input field for the shelf life duration (e.g., 300, 12).
- **Time Unit**: A choice between "Day" and "Month" using radio buttons.
- **Save / Cancel**: Buttons to save the new shelf life entry or cancel the input.

3. Steps for Adding a Shelf Life

- Navigate to the **Utilities > Shelf Life Settings** menu.
- Click the add button (if available) to open the input form.
- Enter the **Shelf Life** number (e.g., "365").
- Select the time unit, either **Day** or **Month**.
- Click **Save** to store the new entry, or **Cancel** to discard it.

4. Integrated Workflow & Business Process

- **Shelf Life Data Standardization**: All new products/items entered into the master data will select one of the standard shelf lives from this menu.

- **Integration with Inventory Module**: When goods are received in the warehouse, the system will refer to this shelf life data to automatically calculate the expiration date.

- **Quality & Compliance**: Accurate shelf life data is crucial for compliance in the food, pharmaceutical, or chemical industries—areas with strict regulations regarding the distribution and sale of expired goods.

5. Tips & Important Notes

- Ensure the shelf life unit and number are accurate and comply with the applicable product specifications and regulations.

- Conduct periodic audits and updates of the shelf life data to accommodate new formulations or regulations from suppliers or government agencies.

- Ensure all master items use the standardized shelf life logic defined here to facilitate the monitoring of expired stock and batch tracing throughout the supply chain.

Custom Document Settings

Module Guide: Customs Document Settings

Module Location

Utilities > Customs Document Settings

Module Purpose

The **Customs Document Settings** module is used to define and manage the master data for customs document types related to the company's import-export processes. This ensures that all customs transactions comply with regulations, are well-documented, and are easily traceable by document type and status.

1. Main View (List of Customs Document Types)

View Explanation

- **Customs Document Types Table**:
  - **Customs Type Code**: The national code or number for the customs document (e.g., BC 2.6.2, BC 2.3).
  - **Customs Type Detail**: A detailed description or explanation of the document's use (e.g., "Ex Subcon, Ex Loan, Ex Repair", "Import, Re-import").
  - **Customs Document Type**: Indicates whether the document is for **IN** (inbound to the country/warehouse) or

OUT (outbound).

- **Customs Type Status**: An indicator of whether the document is active or not, usually shown as a checkmark (active) or a cross (inactive).

- **Action Buttons**:
  - **New**: Opens the form to add a new customs document.
  - **Change Status**: Modifies the active/inactive status of a selected document.

2. Add/Edit Customs Document Page

View Explanation

- **Customs Document Code**: An input field for the customs document's short code or name (e.g., BC 2.6.2).
- **Customs Document Detail**: A text area for entering a detailed description of the document's purpose.
- **Document Type**: Radio button selection for **IN** or **OUT** to indicate the document's function.
- **Document Status**: Radio button selection for **Active** or **Inactive** based on the document's usage status in the system.

3. Steps for Adding/Managing Customs Documents

- Navigate to **Utilities > Customs Document Settings**.
- Click **New** to add a new document, or select a document from the list and click **Change Status** to activate/deactivate it.
- Fill in the **Customs Document Code** and **Customs Document Detail** according to regulatory requirements.
- Select the **Document Type** (IN/OUT).
- Set the **Document Status** to **Active** if it is to be used, or **Inactive** if it is for archival/historical purposes only.
- Click **Save** to store the data.

4. Integrated Workflow & Business Process

- **Mandatory Reference for Customs Transactions**: Every import-export transaction in the system must use a code and document detail from this master data to be valid according to customs requirements.
- **Control and Compliance Reporting**: This master data serves as the primary reference for compliance reports, audits, and customs reconciliations.
- **Process Logic**: The distinction between **IN** (inbound) and **OUT** (outbound) transactions will be clearly maintained, allowing each logistics process to automatically adapt the required legal supporting documents.

5. Tips & Important Notes

- Always ensure the customs document types are updated if there are changes in government regulations.
- Define the descriptions clearly so that users without a customs background can still select the correct document when inputting transactions.
- Managing active versus inactive documents is important to ensure that new transactions only use currently valid customs documents.
- Access to this feature should be restricted to tax/customs staff or compliance administrators.

E-Mixing Line Settings

Module Guide: E-Mixing Line Settings

Module Location

Utilities > E-Mixing Line Settings

Module Purpose

The **E-Mixing Line Settings** module is used to define, activate, or deactivate the status of each production line that utilizes the E-Mixing system. This module is crucial for data integration and for configuring workflows based on the actual setup of the production lines.

1. Main View (E-Mixing Line List)

View Explanation

- **E-Mixing Line Table**:
  - **No.**: The sequence number for the line.
  - **Line**: The name or code of each production line.
  - **Reason**: A column containing a brief description of the status change (e.g., "E-mixing trial" or "Syncing e-mixing to sunfish 2.0").
  - **User Update**: The last user who modified the status or information for that line.

- **Date Update**: The date and time of the most recent update.
- **Line Status**: A status column indicating active (green checkmark) or inactive (red cross).

- The status can be edited by clicking on a row in the table.

2. Add/Update E-Mixing Line Page

View Explanation

- **Line**: A dropdown menu listing the available production lines.
- **E-Mixing Line Status**: A choice of **Active** (checkmark) or **Inactive** (radio button).
- **Reason for Activation/Inactivation**: A text field for recording the reason behind the status change.
- **Save** button to store changes and a **Cancel** button to discard the action.

3. Steps for Adding/Managing E-Mixing Lines

- Go to **Utilities > E-Mixing Line Settings**.
- Click the **New** button to add or edit line details.
- Select the **Line** from the available dropdown menu.

- Set the **Status**: Activate or deactivate based on operational needs.
- Enter the **Reason for Activation/Inactivation** to log the change.
- Save the data using the **Save** button.
- To change the status of an existing line, click on the line's row, make the necessary changes to the status or reason, and then save.

4. Integrated Workflow & Business Process

- **Control of Active E-Mixing Lines**: By setting the status, users can control which lines are included in the automated E-Mixing process and data integration with Sunfish or other ERP systems, ensuring only operationally ready lines are active.
- **Auditing & Tracking**: The reason, user, and update time columns are essential for audit purposes (for example, if operational issues arise and a history of line setup changes is needed).

5. Tips & Important Notes

- Ensure the active/inactive status always reflects the actual conditions on the factory floor to prevent errors in the automated integration process.

- Always record the reason for status changes to assist the maintenance and IT teams during troubleshooting or system audits.

- Access to this module should be restricted to production supervisors, maintenance staff, or system administrators who understand the operational conditions and data reconciliation needs.

Pending BC

Module Guide: Pending BC (Customs Documents)

Module Location

Utilities > Pending BC

Module Purpose

The **Pending BC** module is used to record and manage customs documents (Bea Cukai, or BC) that are still pending or incomplete at the time of a logistics transaction (typically the shipping or receiving of goods). This module acts as a temporary repository for BC data that must be documented for compliance purposes, while also serving as a reminder that the related transaction is not yet fully cleared legally or administratively.

1. Main View and Pending BC Input Form

View Explanation

The form consists of several main input fields:

- **Delivery Order No**: The delivery order number, used as a reference for the shipment or receipt.
- **Item Category**: The category of the goods (e.g., a dropdown for "FINISHED GOODS").
- **BC Type**: The type of customs document (e.g., a dropdown for "Inbound," with other options like "Outbound").

- **Customs Document Type List**: A selection of customs document types that have been registered in the Customs Document Settings module, such as "BC 2.6.2 – Ex Subcon, Ex Loan, Ex Repair."
- **Vendor Name**: A selection of vendors applicable to the transaction with the pending BC document.
- The **Submit data** button is used to save the input to the system.

2. Steps for Inputting a Pending BC Document

- Navigate to **Utilities > Pending BC**.
- Enter the **Delivery Order No** according to the physical document from the shipment or receipt.
- Select the relevant **Item Category** from the dropdown menu.
- Choose the **BC Type** that corresponds to the customs transaction type.
- Select the **Customs Document Type List** from the master documents that were previously set up.
- Choose the **Vendor Name** associated with the transaction.
- Click **Submit data** to save the pending BC document information to the system for reference and control.

3. Integrated Workflow & Business Process

- **Tax and Customs Compliance Control**: All shipping/receiving documents with an unclear BC status are recorded in the Pending BC module to facilitate monitoring and reconciliation.

- **Master Data Integration**: The selection of document types and vendors refers to the master customs document and master vendor data within the system.

- **Status Updates**: Once the BC transaction is cleared (e.g., the original physical document from customs has been received), the user must update the document's status to remove it from the pending list. This is typically done through a separate menu or table for pending BCs (which is not shown in the image, only the input form).

4. Tips & Important Notes

- Always input pending BC information as soon as possible after a shipment/receipt with an unissued BC document to avoid administrative backlogs.

- Only select the document type, BC type, and vendor that are genuinely valid for each transaction—ensure it is synchronized with physical documents and other supporting paperwork.

- This module must be frequently reconciled with the actual status of customs documents to prevent errors during tax or customs audits.

- The management of pending BCs should be handled by the logistics department, customs administration, or compliance staff who understand BC documents and the goods release process.

Goods Receipt Sources

Module Guide: Goods Receipt Sources

Module Location

Utilities > Goods Receipt Sources

Module Purpose

The **Goods Receipt Sources** module is used to define and map the data sources related to the origin of incoming goods within the system. This module is essential for integrated warehouse operations where the system must differentiate incoming stock data originating from various platforms, applications, or other digital workflows (e.g., integration with an external application like C-App).

1. Main View (List of Goods Receipt Sources)

View Explanation

- **Goods Receipt Source Table**:
  - **Warehouse**: The name of the warehouse or receiving location.
  - **Data Source from C-App**: Indicates whether the receipt originates from C-App or another digital channel.
  - **Reason**: A column for recording notes or the reason for the configuration/customization of the receipt source.

- **Action**: Provides actions (like edit/delete) to modify the mapping of the goods receipt source.

- The data in this table will be empty if no configuration or mapping has been set up.

2. Steps for Inputting/Mapping Goods Receipt Sources

- Navigate to **Utilities > Goods Receipt Sources**.

- (If available) click **Add** to create a new mapping/category for a receipt source.

- Fill in the warehouse name, the data source (e.g., select C-App if the receipt is from that application), and the reason for the setting.

- Save the data so the system recognizes the receipt source according to the configuration for each warehouse/platform.

3. Integrated Workflow & Business Process

- **Accurate Incoming Stock Data**: A well-mapped goods receipt source is crucial in a multi-application integration to prevent double-counting of stock or unrecognized goods receipts in reporting and logistics dashboards.

- **Auditing & Reconciliation**: By knowing the receipt source, the internal audit team can trace the data's origin and validate the integrity of stock receipt data across different

applications/platforms.

4. Tips & Important Notes

- Perform the mapping of receipt sources carefully, especially if new applications are being developed and integrated into the core system.
- Write clear reasons for each mapping to make it easier to trace issues if stock discrepancies or data disputes occur.
- Only users with a thorough understanding of the system and cross-departmental application integration should be given access to add, edit, or delete entries in this menu.

Push Data to Kokola App

Module Guide: Push Data to Kokola App

Module Location

Utilities > Push Data to Kokola App

Module Purpose

The **Push Data to Kokola App** module is used to manually send (synchronize) specific data from the core system (ERP, warehouse management, etc.) to the external "Kokola App." This feature ensures that important data such as purchase orders, items, and vendor information remains consistent and up-to-date between the two integrated systems.

1. Main View and Push Data Form

View Explanation

The form consists of several main inputs:

- **Transaction Type**: Radio button selection between **PO** (Purchase Order), **Item** (goods/master products), or **Vendor**.
- **PO Number**: If the **Transaction Type** is PO, a dropdown menu is available to select one of the PO numbers ready to be sent (e.g., "PWU2012502-0000517 - SURYA INDAH PLASTIK").
- The **Submit data** button is used to initiate the process of pushing the selected data to the Kokola App.

2. Steps to Push Data to the Kokola App

- Navigate to **Utilities > Push Data to Kokola App**.
- Select the **Transaction Type** to be sent (PO/Item/Vendor) using the radio buttons.
- If you choose PO, select the specific **PO Number** from the dropdown menu.
- Click **Submit data** to begin the sending process to the Kokola application.
- The system will then copy or send the relevant data to the Kokola platform and await a notification or confirmation of whether the transmission was successful or failed.

3. Integrated Workflow & Business Process

- **System Integration**: This module serves as a manual trigger to expedite or force a data synchronization that is normally scheduled or automatic. It is particularly useful for urgent new data or important revisions.
- **Data Exchange Control**: The push process is only performed on data and transactions that have been verified and are ready in the main system to prevent data errors in the Kokola system.
- **Execution Method**: Ideally, after the **Submit data** button is pressed, the system performs a validation and displays a message (success/failure) indicating the result of the

transmission. This ensures the user is aware of the status after performing the action.

4. Tips & Important Notes

- Always ensure that the data is correct and valid before pushing it, especially for Purchase Orders, as they will affect downstream processes.

- Use this push feature only for urgent data, sudden update needs, or in cases of integration support/troubleshooting to avoid double entries or data anomalies.

- Access should be restricted to the IT team or administrators who understand the impact of pushing data to another application, in order to minimize the risk of human error or cross-system data inconsistencies.