



Online Approval Form User Guide

For

Chin Hin Group Bhd

Revision v1.3

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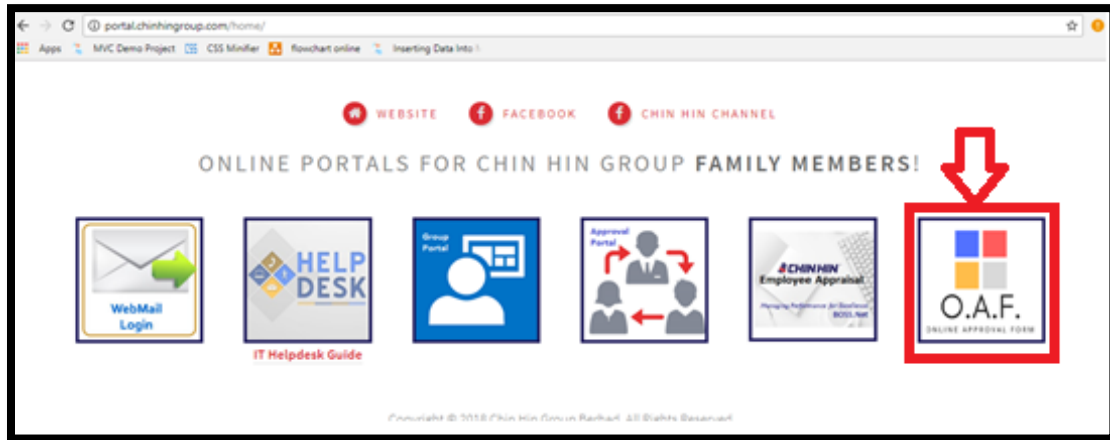
Revision History

Date	Revision	Comment	Issued/Reviewed by
30-05-2018	v1	Initial draft	Raymond Tong
30-05-2018	V1.1	Add Table of content, Email Template, Revision History	Raymond Tong
11-06-2018	V1.2	Add facelift image	Raymond Tong
07-12-2018	V1.3	Add SO OAF	Raymond Tong



Access

- Following are the methods to access the OAF system
 - Access the website using this link www.portal.chin hingroup/home and click on the O.A.F icon.



- Access the website using this link www.portal.chin hingroup/home/chinhinoaf



First landing page

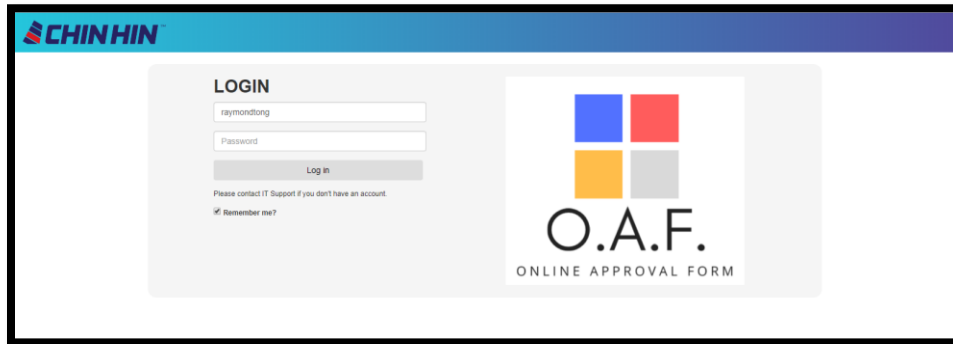
- The difference for mobile and desktop version are just the layout, functionality and the URL are still the same.

Desktop version – side panel for navigation

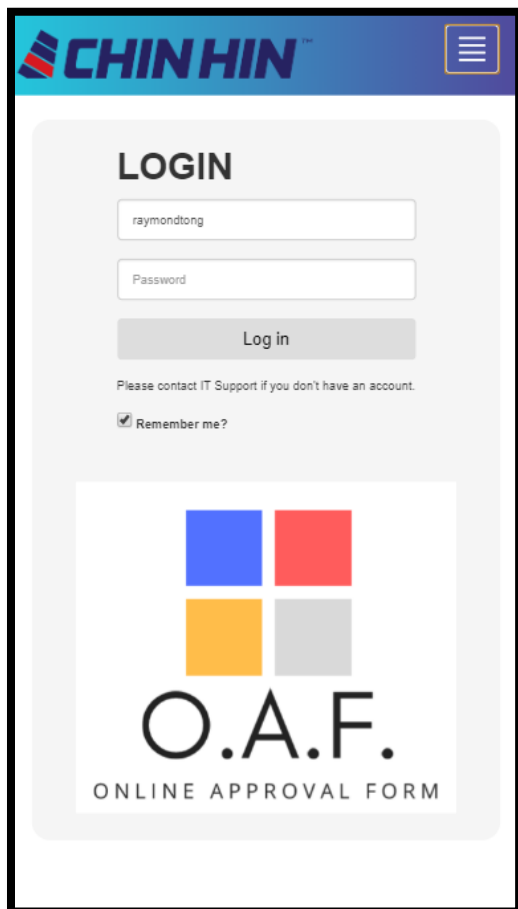
Mobile version – top panel for navigation

- Following are the screenshot of the OAF landing page

1. Desktop version



2. Mobile version





Login screen

- Fill up the username and password to and click login

Field

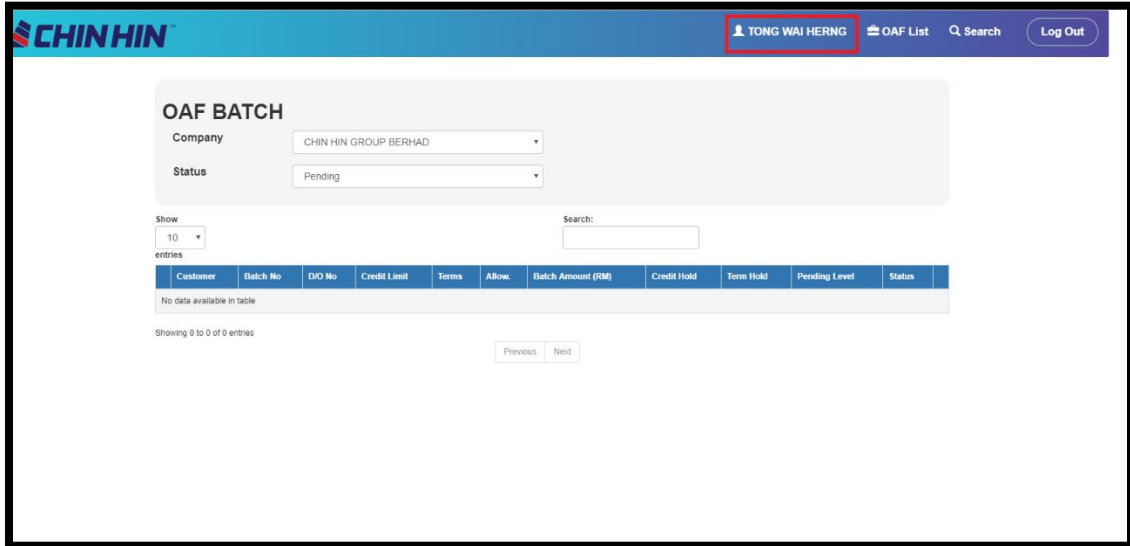
Field Name	Input Type	Remarks
Username	Text	To key in username
Password	Password	To key in password

Button

Field Name	Input Type	Remarks
Login	-	To validate user identity and login into the system

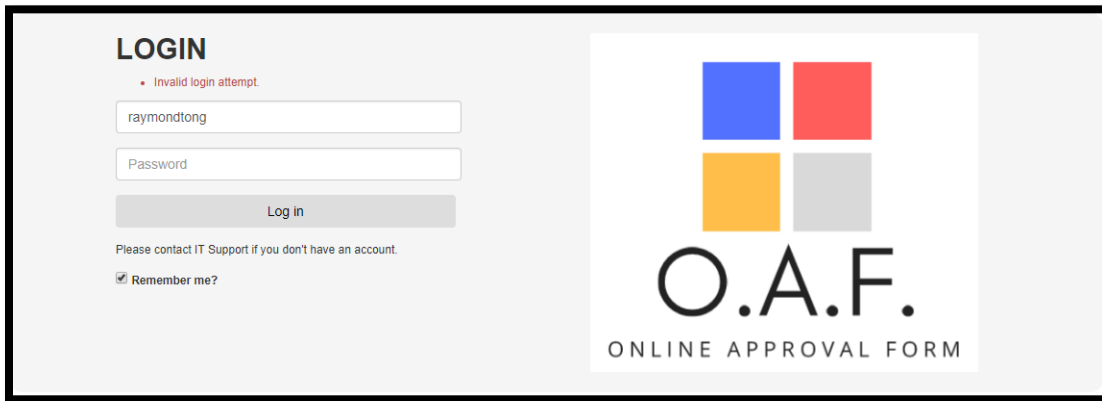


- Following are the event of once user click login.
Login Success
- Once user login successfully, system will show the name of the user at the side bar panel/ top navigation panel



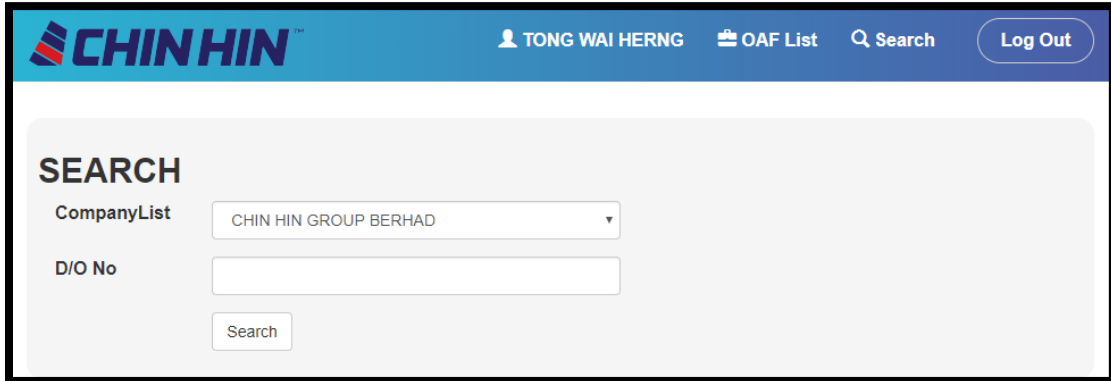
Login Failed

- If user login failed, system will show message “Invalid login attempt”

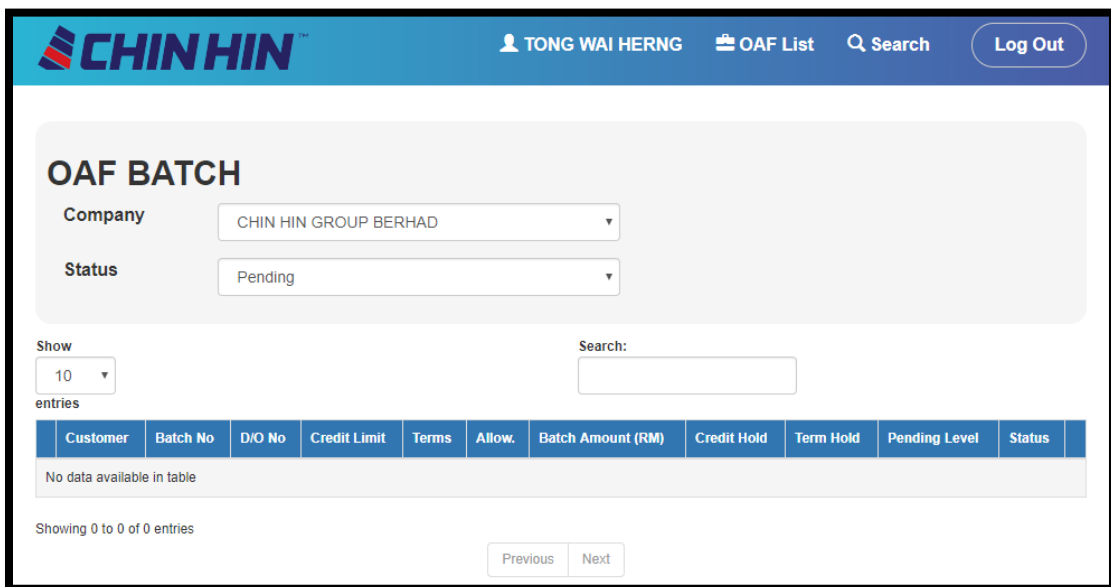


Homepage screen

- System will redirect user specific page based on access given
 - Search DO screen



- OAF list



- There are several actions can be done in the current screen

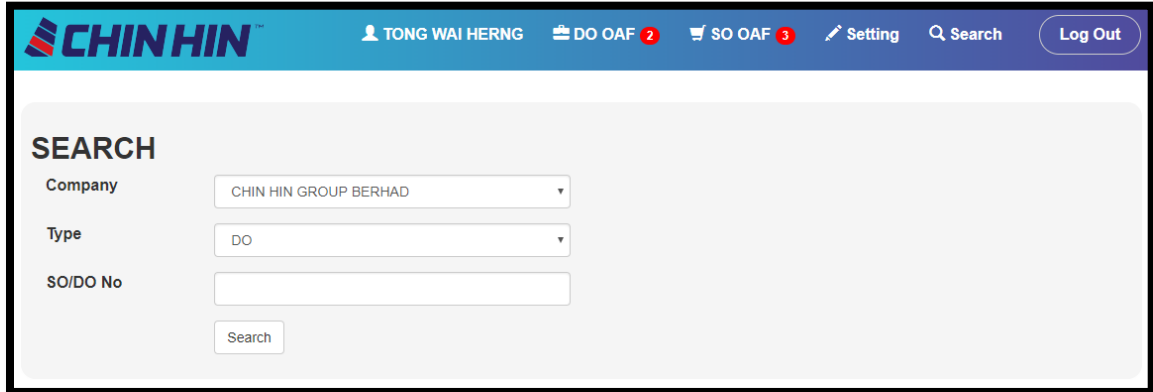


Top panel options

Field Name	Input Type	Remarks
OAF List	-	Proceed to OAF Listing page
Search	-	Proceed to D/O page

Search screen

- Following are the Search screen once user click Search (button/options)
- System will pre-select the according to user's company



- Once user click in the D/O number, results will show in a table format

Field

Field Name	Input Type	Remarks
Company	Dropdown list	Select company
Type	Dropdown list	Type of OAF
SO/DO No	Textbox	Field to key in No

Button

Field Name	Input Type	Remarks
Search	-	To search results according to the value key in based on user input



- Following are the event once user click on search button
Show results with valid D/O No

SEARCH

CompanyList

D/O No

Customer	Batch No	Status	Last Approved/Rejected Level	Pending
	SAAC_20180516_113447	Approved	Level 6	

- **Search results without D/O No**

SEARCH

CompanyList

D/O No

The D/O No field is required.

- **Search results with invalid D/O No**

SEARCH

CompanyList

D/O No

The field D/O No must be a number.



- Following are the explanations of the D/O results table
- Difference user will have different access view

User

- The results will show **one** or **multiple** records
- It depends on how many approval routes the D/O has been through

Customer	Batch No	Status	Last Approved/Rejected Level	Pending
[REDACTED]	SAAC_20180517_132305	Approved	Level 6	
[REDACTED]	SAAC_20180515_153555	Approved	Level 6	

Table Field

Field Name	Input Type	Remarks
Customer	-	Customer name of the D/O
Batch No	-	Unique number to identify the grouping of the D/O number
Status	-	Status of the approval routing (Approved/Reject/Routing)
Last Approved/Reject Level	-	Latest level of the approval
Pending	-	The current routing is depending on which approver



Admin

- The results will show **one** or **multiple** records
- It depends on how many approval routes the D/O has been through
- **Details** button will link back to the

Customer	Batch No	D/O No	Credit Limit	Terms	Allow.	Batch Amount (RM)	Credit Hold	Term Hold	Status	Last Approved/Rejected Level	Pending	
[REDACTED]	SAAC_20180517_132305	38796	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	Approved	Level 6		Details
[REDACTED]	SAAC_20180515_153555	38796	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	Approved	Level 6		Details

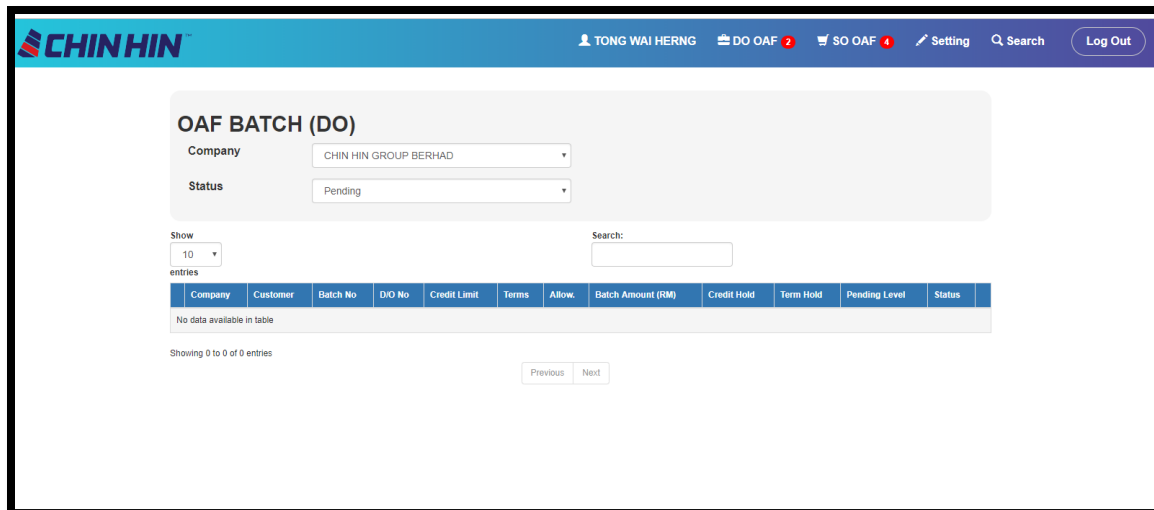
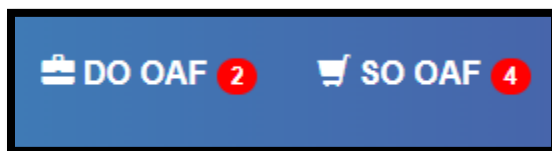
Table Field

Field Name	Remarks
Customer	Customer name of the D/O
Batch No	Unique number to identify the grouping of the D/O number
D/O No	The last D/O number was pack in the batch
Credit Limit	The credit limit of the customer
Terms	The max terms date of the customer
Allowance	The extra allowance date of the customer
Batch Amount	The total amount of the batch (single or multiple D/O)
Credit Hold	Status to indicate whether customer is hold due to credit (Yes or Empty)
Term Hold	Status to indicate whether customer is hold due to term (Yes or Empty)
Status	Status of the approval routing (Approved/Reject/Routing)
Last Approved/Reject Level	Latest level of the approval
Pending	The current routing is depending on which approver
Details	Click to redirect to the OAF record in details

Approval listing screen

- System will pre-select the according to user's company and reload the data which pending on the user
- Once both **Company** and **Status** dropdown list on change, system will get data and populate into the table below.
- The red indicator beside the icon show the number of Approval pending.
- Following table shows type of OAF for different Company

Company	OAF Type
STARKEN AAC SDN BHD	DO
G CAST CONCRETE SDN BHD	DO
PP CHIN HIN SDN BHD	SO

Field

Field Name	Input Type	Remarks
Company	Dropdown list	Select D/O's company
Status	Dropdown list	Select the status of the D/O's <ol style="list-style-type: none"> Pending <ul style="list-style-type: none"> - routing approval which pending on the user All <ul style="list-style-type: none"> - routing approval which related to the user
Show	Dropdown list	Select how many records to show in the table
Search	Textbox	Wildcard search according to table information



- Following are the explanations of the approval listing results table
- Record are populated based on the company and the status chosen by user

OAF BATCH

Company:

Status:

Show: entries

Search:

Customer	Batch No	D/O No	Credit Limit	Terms	Allow.	Batch Amount (RM)	Credit Hold	Term Hold	Pending Level	Status
Details	[REDACTED]	SAAC_20180530_110259	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	Level 1	Routing

Table Field

Field Name	Remarks
Customer	Customer name of the D/O
Batch No	Unique number to identify the grouping of the D/O number
D/O No	The last D/O number was pack in the batch
Credit Limit	The credit limit of the customer
Terms	The maximum credit terms date of the customer
Allowance	The extra allowance date of the customer
Batch Amount	The total amount of the batch (single or multiple D/O)
Credit Hold	Status to indicate whether customer is hold due to credit (Yes or Empty)
Term Hold	Status to indicate whether customer is hold due to term (Yes or Empty)
Status	Status of the approval routing (Approved/Reject/Routing)
Last Approved/Reject Level	Latest level of the approval
Pending	The current routing is depending on which approver
Details	Click to redirect to the OAF record in details



DO Approval Detail screen

- Following are the Approval listing screen once user click
 - **Detail** button from the search result in **Search** page
 - **Detail** button from the search results in **Approval Listing** page
- Explanation on section and tabs will be provided in the following screenshot and table

Starken AAC Sdn. Bhd. (752003-D) (SAAC)

QAF Batch (All amount are in Ringgit Malaysia)

Customer Info.

ID [REDACTED]
Name [REDACTED]
Service By **RYAN TAN (RYAN)**
Credit Application Form ? [REDACTED]
BG/ CG Amount [REDACTED]
Personal Guarantee? [REDACTED]

Credit Info.

Credit Limit	[REDACTED]	Credit Term	[REDACTED]
Outstanding Amount	[REDACTED]	Allowance	[REDACTED]
Credit Limit Exceeded / (Within)	[REDACTED]	Maximum Term	[REDACTED]
Credit Hold	[REDACTED]	Term Hold	<input checked="" type="checkbox"/>

Outstanding Info.

Open AR (Posted)	[REDACTED]	> 120 Days	[REDACTED]
Open AR (Unposted)	[REDACTED]	91 - 120 Days	[REDACTED]
Open DO	[REDACTED]	61 - 90 Days	[REDACTED]
This QAF Batch Amount	[REDACTED]	31 - 60 Days	[REDACTED]
Outstanding Amount	[REDACTED]	1 - 30 Days	[REDACTED]
		Current	[REDACTED]
		Open AR (Posted)	[REDACTED]

Batch Info.

Batch No **SAAC_20180530_110255**
Current Status **Routing**

QAF Batch Approval Details | Open AR (Posted) | Open AR (Unposted) | Open DO | Batch Details

Level	Batch No	Status	Comment	Created By	Created Date
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Approval Request

Action Approve Reject

Comment

Submit



Sections

Customer Info section

Field Name	Field Type	Remarks
ID	Label	ID of the customer
Name	Label	Customer name of the D/O
Service By	Label	Name of the sales person in charge for the customer
Credit Application Form	Checkbox	-
BG/ CG Amount	Label	-
Personal Guarantee		-

Credit Info section

Field Name	Field Type	Remarks
Credit Limit	Textbox	The credit limit of the customer
Outstanding Amount	Textbox	-
Credit Limit Exceeded / (Within)	Textbox	- If credit limit amount is within then the amount comes with a bracket - If no bracket means the amount exceeded
Credit Hold	Checkbox	Status to indicate whether customer is hold due to credit (check or uncheck)
Credit Terms	Textbox	The maximum credit terms date of the customer
Allowance	Textbox	The extra allowance date of the customer
Maximum Term	Textbox	The total number of terms date of the customer (Terms + Allowance)
Term Hold	Checkbox	Status to indicate whether customer is hold due to term (check or uncheck)

Outstanding info section

Field Name	Field Type	Remarks
Open AR (Posted)	Textbox	-
Open AR (Unposted)	Textbox	-
Open DO	Textbox	-
This OAF Batch Amount	Textbox	The total amount of approval which include multiple D/O s
Outstanding amount	Textbox	The total outstanding amount of the customer
> 120 Days	Textbox	Outstanding amount more than 120 days of the customer
91 – 120 Days	Textbox	Outstanding amount within 91 - 120 days of the customer



61 – 90 Days	Textbox	Outstanding amount within 61 - 90 days of the customer
31 – 60 Days	Textbox	Outstanding amount within 31 - 60 days of the customer
1 – 30 Days	Textbox	Outstanding amount within 1 - 30 days of the customer
Current	Textbox	The current outstanding amount
Open AR (Posted)	Textbox	-

Batch info section

Field Name	Field Type	Remarks
Batch No	Label	Unique number to identify the grouping of the D/O number
Current Status	Label	Status of the approval routing (Approved/Reject/Routing)



DO Tabs

OAF Batch Approval Details Tab

- This tab shows the routing approval history
- If the approval request form show at the bottom, means you have the right to either **approve** and **reject** this batch. If not showing means you don't have the rights.
- Following details will explain the table and the action to be done on this tab
- Once the request is submitted, an email will send out to inform the next person in charge.
- If the routing complete, email will send out to the sales person to notify the routing **approve / reject**.

Approval Details History Table

Field Name	Remarks
Level	The level of the approval history
Batch No	Unique number to identify the grouping of the D/O number
Status	The status of the approval for each level (approve or reject)
Comment	The comment provided for each level approver
Created By	The name approver of each level
Created Date	The approval date and time

Approval request

Field Name	Field Type	Remarks
Action	Checkbox	Action to be done on this approval (Approve / Reject)
Comment	Text area	Include the comment based on the action provided
Submit	Button	Submit the approval request within the information provided by user

Open AR (Posted) Tab

- This tab shows open invoice of the customer which is posted
- Total amount will be located at the bottom of the table
- Following details will explain the table on this tab

Field Name	Remarks
No	Sequence number
Invoice No	The number of the invoice from the customer
Invoice Date	The Date of the invoice (dd-mm-yyyy)
Amount(RM)	Amount of the invoice
Total Amount	Total Amount of the Open AR (Posted)



Open AR (unposted) Tab

- This tab shows open invoice of the customer which not yet posted
- Total amount will be located at the bottom of the table
- Following details will explain the table on this tab

Field Name	Remarks
No	Sequence number
Invoice No	The number of the invoice from the customer
Invoice Date	The Date of the invoice (dd-mm-yyyy)
Amount(RM)	Amount of the invoice
Total Amount	Total Amount of the Open AR (UnPosted)

Open DO

- This tab shows delivery order of the customer which is open
- Total amount will be located at the bottom of the table
- Following details will explain the table on this tab

Field Name	Remarks
No	Sequence number
D/O No	-
Ship Date	The delivery date to be shipped (dd-mm-yyyy)
Amount(RM)	Amount of the invoice
Total Amount	Total Amount of the Open DO

Open SO

- This tab shows Sales order of the customer which is open
- Total amount will be located at the bottom of the table
- Following details will explain the table on this tab

Field Name	Remarks
No	Sequence number
SO No	The number of the invoice from the customer
SO Date	Sales order Date
SO Amount (RM)	Amount of the order
Total Amount	Total Amount of the Open SO

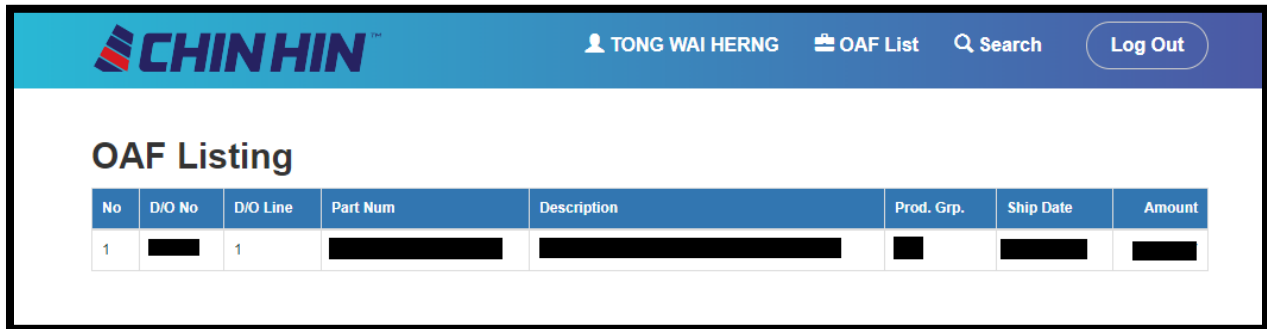
Batch Details

- This tab shows this batch comes with how many D/O s
- Total amount will be located at the bottom of the table
- Following details will explain the table on this tab

Field Name	Remarks
No	Sequence number
D/O No	The number of the invoice from the customer
D/O Date	The delivery date to be shipped (dd-mm-yyyy)
Ship To	Location to be shipped
OAF Amount(RM)	Amount of this approval form
Total Amount	Total Amount of the Open AR (Posted)
D/O Line	Open new tab to show the D/O Details
Same DO OAF Batch	Open new tab to search the D/O history (which redirect to Search D/O with the D/O number provided)

D/O Listing screen

- Following are the Approval listing screen once user click
 - **D/O Line** button from the **Batch Detail** tab in **Approval Detail Page**



No	D/O No	D/O Line	Part Num	Description	Prod. Grp.	Ship Date	Amount
1	[REDACTED]	1	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

- Following table will explain the information on this page

Field Name	Remarks
No	Sequence number
D/O No	The number of the invoice from the customer
D/O Line	-
Part Num	-
Description	-
Product Group	-
Ship Date	The delivery date to be shipped (dd-mm-yyyy)
Amount	Amount of the D/O



Sales Order Approval Detail screen

- Following are the Approval listing screen once user click
 - **Detail** button from the search result in **Search** page
 - **Detail** button from the search results in **Approval Listing** page
- Explanation on section and tabs will be provided in the following screenshot and table

PP Chin Hin Sdn Bhd (KL) (PPCH)

OAF Batch (All amount are in Ringgit Malaysia)

Customer Info.

ID: [REDACTED]
 Name: [REDACTED]
 Service By: [REDACTED]
 Credit Application Form ?
 BG/ CG Amount: [REDACTED]
 Personal Guarantee?

Credit Info.

Credit Limit	[REDACTED]	Credit Term	[REDACTED]
Outstanding Amount	[REDACTED]	Allowance	[REDACTED]
Credit Limit Exceeded / (Within)	[REDACTED]	Maximum Term	[REDACTED]
Credit Hold	<input checked="" type="checkbox"/>	Term Hold	[REDACTED]
Last Payment Amount	[REDACTED]	Last Payment Date	[REDACTED]

Outstanding Info.

Open AR (Posted)	[REDACTED]	> 120 Days	[REDACTED]
Open AR (Unposted)	[REDACTED]	91 - 120 Days	[REDACTED]
Open DO	[REDACTED]	61 - 90 Days	[REDACTED]
Open SO	[REDACTED]	31 - 60 Days	[REDACTED]
This OAF Batch Amount	[REDACTED]	1 - 30 Days	[REDACTED]
Outstanding Amount	[REDACTED]	Current	[REDACTED]
		Open AR (Posted)	[REDACTED]

Batch Info.

Batch No: PPCH_20181206_164450
 Current Status: Routing

OAF Batch Approval Details	Open AR (Posted)	Open AR (Unposted)	Open DO	Open SO	Batch Details
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No	Order Number	OAF Date	Ship To	OAF Amount (RM)		
1	338732	06-12-2018	[REDACTED]	[REDACTED]	S/O line	Same SO OAF Batch
				[REDACTED]		

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Sections

Customer Info section

Field Name	Field Type	Remarks
ID	Label	ID of the customer
Name	Label	Customer name of the D/O
Service By	Label	Name of the sales person in charge for the customer
Credit Application Form	Checkbox	-
BG/ CG Amount	Label	-
Personal Guarantee		-

Credit Info section

Field Name	Field Type	Remarks
Credit Limit	Textbox	The credit limit of the customer
Outstanding Amount	Textbox	-
Credit Limit Exceeded / (Within)	Textbox	- If credit limit amount is within then the amount comes with a bracket - If no bracket means the amount exceeded
Credit Hold	Checkbox	Status to indicate whether customer is hold due to credit (check or uncheck)
Credit Terms	Textbox	The maximum credit terms date of the customer
Allowance	Textbox	The extra allowance date of the customer
Maximum Term	Textbox	The total number of terms date of the customer (Terms + Allowance)
Term Hold	Checkbox	Status to indicate whether customer is hold due to term (check or uncheck)

Outstanding info section

Field Name	Field Type	Remarks
Open AR (Posted)	Textbox	-
Open AR (Unposted)	Textbox	-
Open DO	Textbox	-
Open SO	Textbox	-
This OAF Batch Amount	Textbox	The total amount of approval which include multiple D/O s
Outstanding amount	Textbox	The total outstanding amount of the customer
> 120 Days	Textbox	Outstanding amount more than 120 days of the customer



91 – 120 Days	Textbox	Outstanding amount within 91 - 120 days of the customer
61 – 90 Days	Textbox	Outstanding amount within 61 - 90 days of the customer
31 – 60 Days	Textbox	Outstanding amount within 31 - 60 days of the customer
1 – 30 Days	Textbox	Outstanding amount within 1 - 30 days of the customer
Current	Textbox	The current outstanding amount
Open AR (Posted)	Textbox	-

Batch info section

Field Name	Field Type	Remarks
Batch No	Label	Unique number to identify the grouping of the D/O number
Current Status	Label	Status of the approval routing (Approved/Reject/Routing)



Sales Order Tabs

OAF Batch Approval Details Tab

- This tab shows the routing approval history
- If the approval request form show at the bottom, means you have the right to either **approve** and **reject** this batch. If not showing means you don't have the rights.
- Following details will explain the table and the action to be done on this tab
- Once the request is submitted, an email will send out to inform the next person in charge.
- If the routing complete, email will send out to the sales person to notify the routing **approve / reject**.

Approval Details History Table

Field Name	Remarks
Level	The level of the approval history
Batch No	Unique number to identify the grouping of the D/O number
Status	The status of the approval for each level (approve or reject)
Comment	The comment provided for each level approver
Created By	The name approver of each level
Created Date	The approval date and time

Approval request

Field Name	Field Type	Remarks
Action	Checkbox	Action to be done on this approval (Approve / Reject)
Comment	Text area	Include the comment based on the action provided
Submit	Button	Submit the approval request within the information provided by user

Open AR (Posted) Tab

- This tab shows open invoice of the customer which is posted
- Total amount will be located at the bottom of the table
- Following details will explain the table on this tab

Field Name	Remarks
No	Sequence number
Invoice No	The number of the invoice from the customer
Invoice Date	The Date of the invoice (dd-mm-yyyy)
Amount (RM)	Amount of the invoice
Total Amount	Total Amount of the Open AR (Posted)



Open AR (unposted) Tab

- This tab shows open invoice of the customer which not yet posted
- Total amount will be located at the bottom of the table
- Following details will explain the table on this tab

Field Name	Remarks
No	Sequence number
Invoice No	The number of the invoice from the customer
Invoice Date	The Date of the invoice (dd-mm-yyyy)
Amount (RM)	Amount of the invoice
Total Amount	Total Amount of the Open AR (UnPosted)

Open DO

- This tab shows delivery order of the customer which is open
- Total amount will be located at the bottom of the table
- Following details will explain the table on this tab

Field Name	Remarks
No	Sequence number
D/O No	-
Ship Date	The delivery date to be shipped (dd-mm-yyyy)
Amount (RM)	Amount of the DO
Total Amount	Total Amount of the Open DO

Open SO

- This tab shows Sales order of the customer which is open
- Total amount will be located at the bottom of the table
- Following details will explain the table on this tab

Field Name	Remarks
No	Sequence number
SO No	-
SO Date	Sales order Date
SO Amount (RM)	Amount of the order
Total Amount	Total Amount of the Open SO



Batch Details

- This tab shows this batch comes with how many S/O s
- Total amount will be located at the bottom of the table
- Following details will explain the table on this tab

Field Name	Remarks
No	Sequence number
Order Number	Order Number of the Sales Order
OAF Date	Date of the OAF trigger
Ship To	Location to be shipped
OAF Amount (RM)	Amount of this approval form
Total Amount	Total Amount of the Open AR (Posted)
S/O Line	Open new tab to show the S/O Details
Same SO OAF Batch	Open new tab to search the S/O history (which redirect to Search with the S/O number provided)

S/O Listing screen

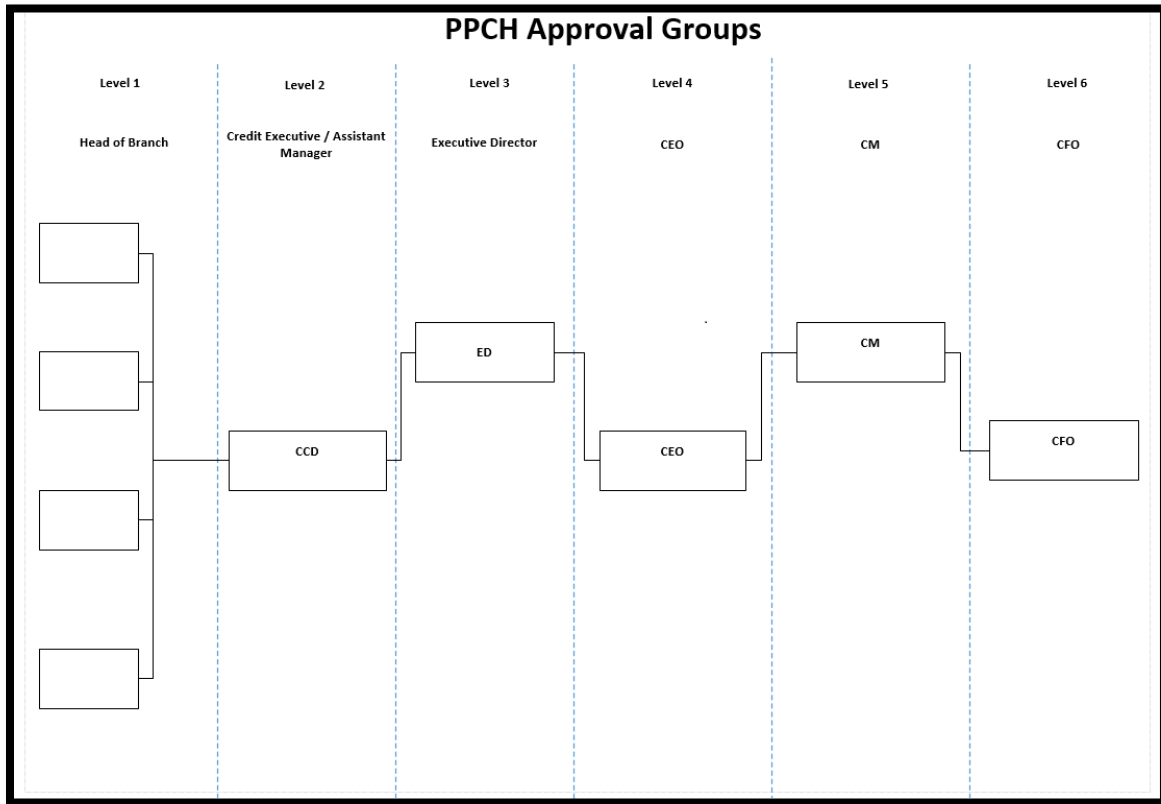
OAF Listing							
No	S/O No	S/O Line	Part Num	Description	Prod. Grp.	Order Date	Amount
1	██████	1	██████	██████	████	██████	██████

- Following are the Approval listing screen once user click
 - **S/O Line** button from the **Batch Detail** tab in **Approval Detail Page**
- Following table will explain the information on this page

Field Name	Remarks
No	Sequence number
S/O No	Sales Order Number
S/O Line	Sales Order Line
Part Num	Part Number
Description	Description of the Part
Product Group	-
Order Date	Sales Order Date
Amount	Amount of the S/O

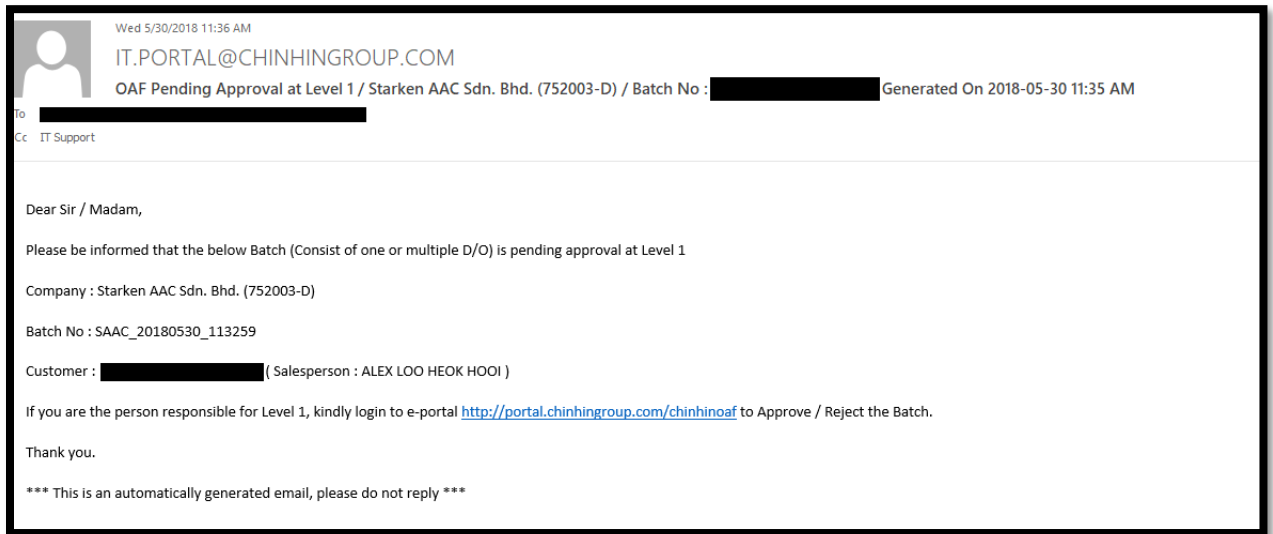
Appendix

- OAF Flow



- Following are the image of the email template

Routing Email Template





Approval Complete Email Template

Wed 5/30/2018 4:25 PM
IT.PORTAL@CHINHINGROUP.COM
OAF Routing Completed with Status : Approved / Starken AAC Sdn. Bhd. (752003-D)(SAAC) / Batch No : SAAC_20180530_110259

To : [REDACTED]
Cc : IT Support

Dear Sir / Madam,

Please be informed that the below Batch (Consist of one or multiple D/O) are completed with status : Approved

Company : Starken AAC Sdn. Bhd. (752003-D)(SAAC)

Batch No : SAAC_20180530_110259

Customer : [REDACTED] (Salesperson : RYAN)

D/O No : 39290

Thank you.

Level	Status	Comment	User	Date
1	Approved	Proceed	[REDACTED]	30-05-2018 15:37
2	Approved	[REDACTED]	[REDACTED]	30-05-2018 16:19
3	Approved	approved	[REDACTED]	30-05-2018 16:21
4	Approved	approved	[REDACTED]	30-05-2018 16:22
5	Approved	support	[REDACTED]	30-05-2018 16:23
6	Approved	support	[REDACTED]	30-05-2018 16:24

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