SITE GIANT PLUGIN

AUTO COUNT SDN BHD

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1.0 Overview

The Site Giant Plugin is the result of cooperation between two Malaysia leading companies to provide faster, simpler, and completely accurate e-Commerce system to their customers. Indeed, the Site Giant plugin will help you to simply synchronize your customers (debtors), products (items), orders, invoices, and payments between the most popular e-Commerce system and the most accurate Accounting system in Malaysia as easy as clicking one button.

The benefits are below:

- Increase productivity and simplify transactions as you are not required to key in the sales order, sales invoice and AR payment all over again. You just need to click buttons.
- Minimise human error. As you just need to click buttons, debtors, items, orders, invoices and payment between Site Giant and AutoCount will be synchronized. Therefore, it reduces human error such as typo.
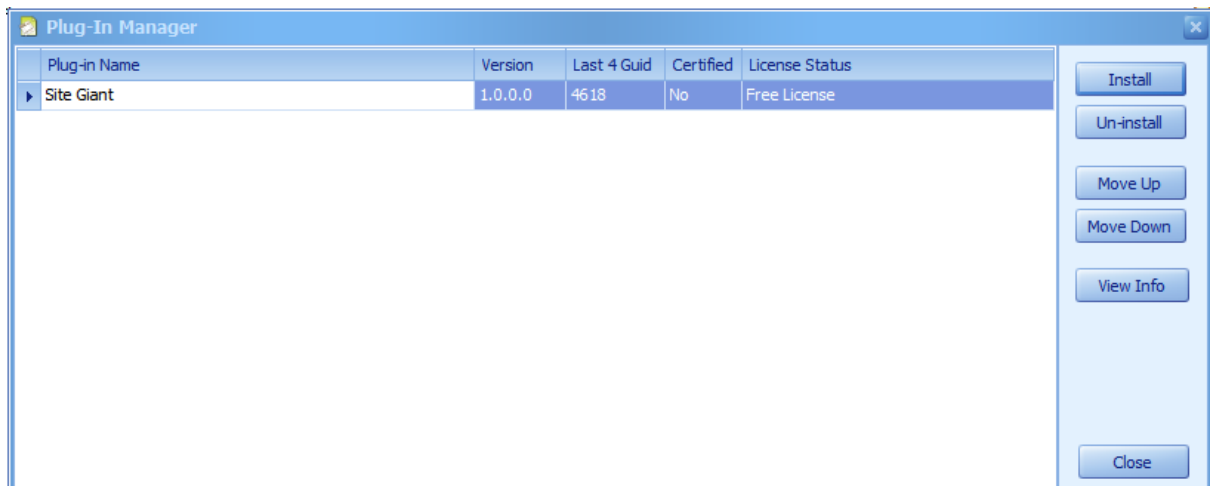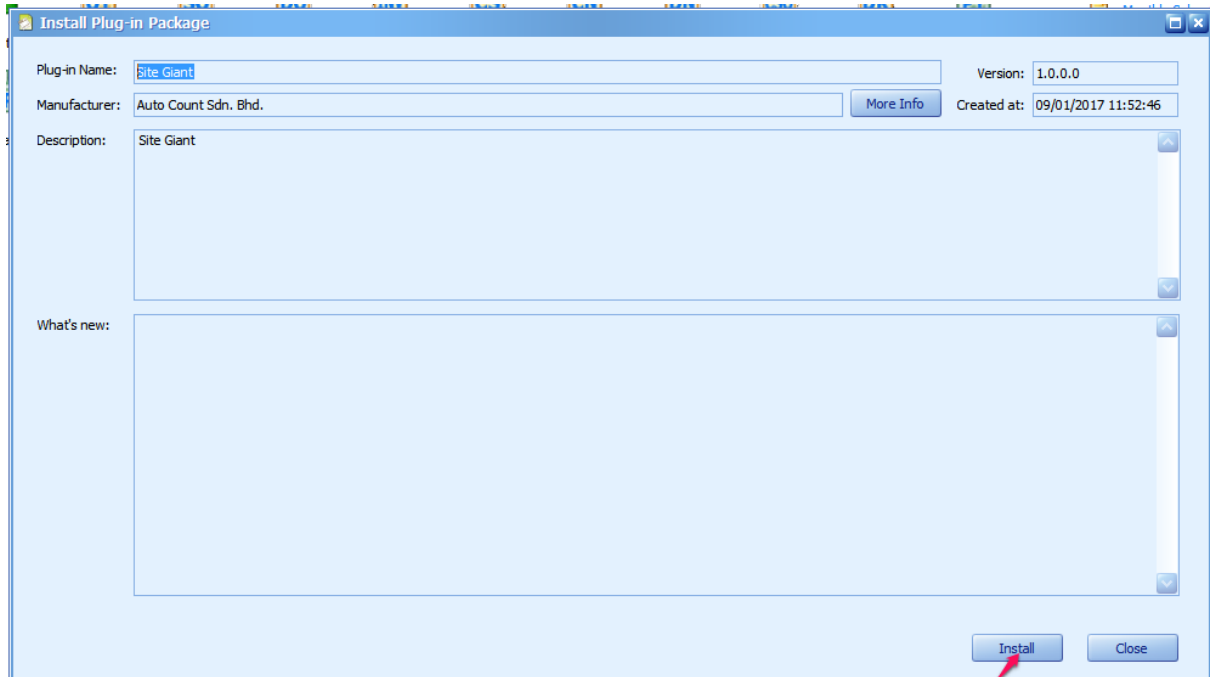
System requirement as below:
- AutoCount Version 1.8.8 and above
- AutoCount Basic Version or Scripting module
- Multi-UOM module

2.0 Installation

Go to Tools> Plugin Manager > Install > Choose the .app file that you save
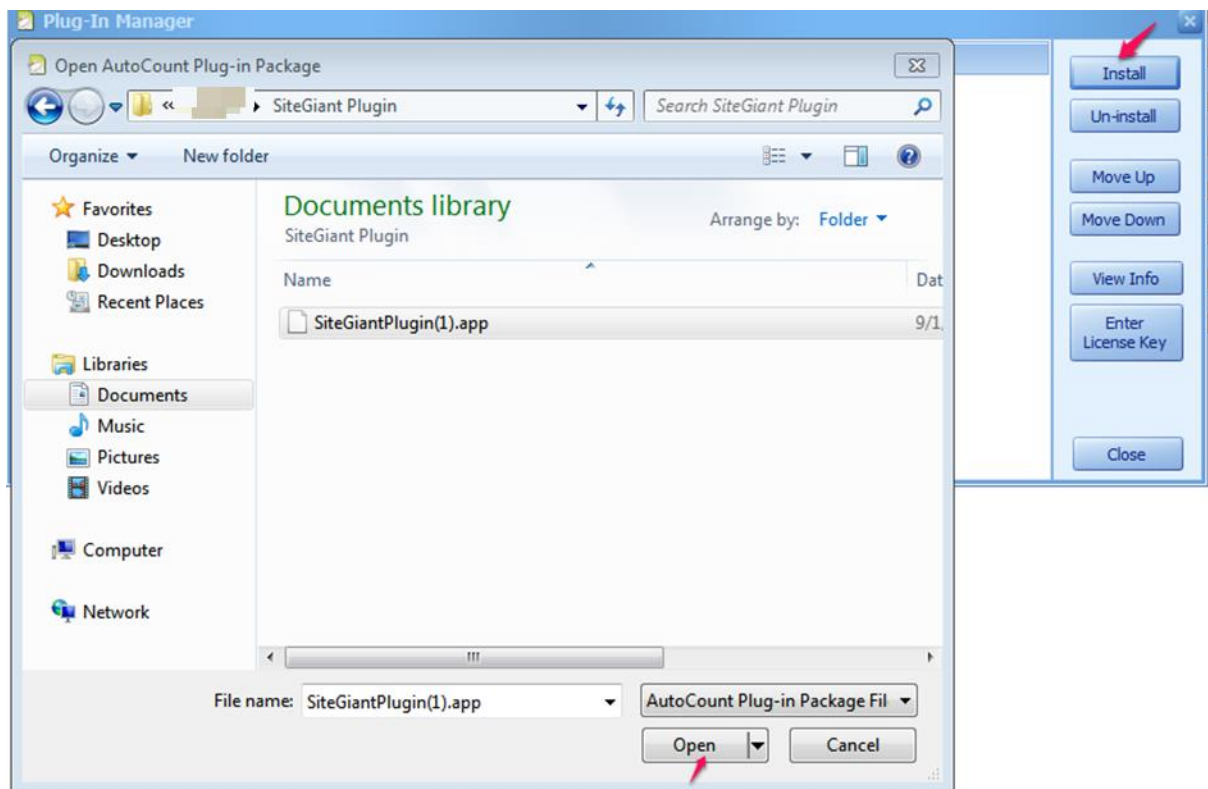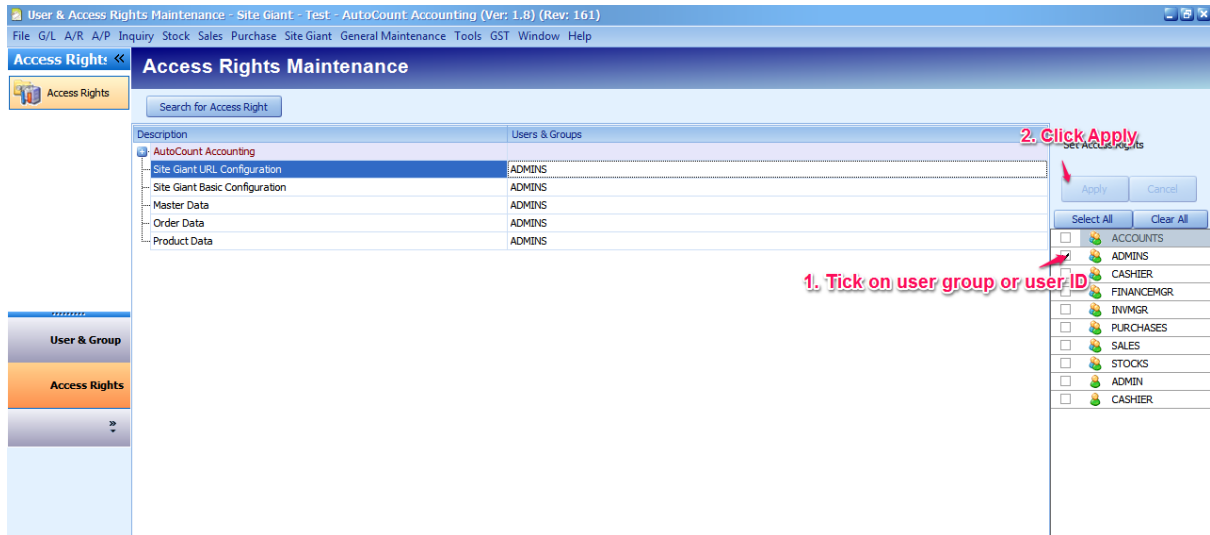
Click Install.

Click Close.

3.0 Access right

First step that you need to do after installation is to set user access right for the plugin. Without doing this, users unable to use the plugin. Go to general maintenance > User maintenance.

On User maintenance screen, click Access Right and assign the user group or user ID as shown below:
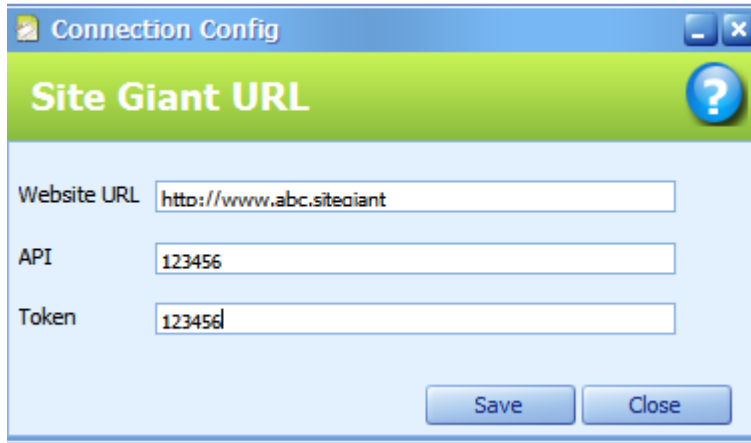
4.0 Settings

4.1 URL Configuration

After setting the user access right, then you need to do the URL configuration. The setting of this one is to link the website with Auto Count so that your customers (debtors), products (items), orders, invoices, and payments can be synced. Therefore, it is compulsory to set URL Configuration.
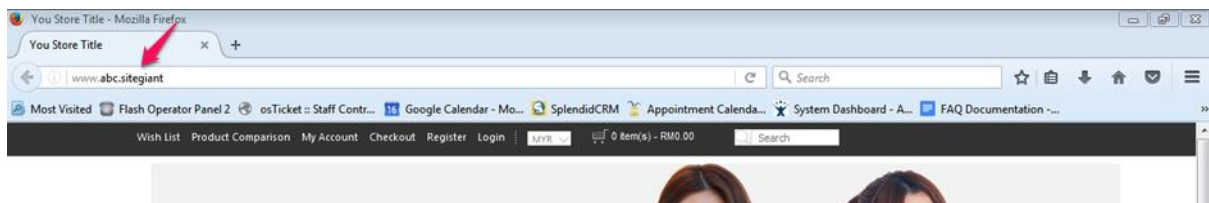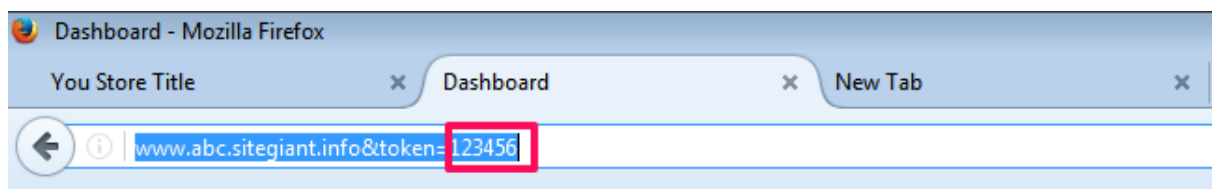
Go to Site Giant > Site Giant URL.

i.   Website URL – the website link.

You may get the website URL from the top of the website.

ii.   API and Token – These are the special characters that are given by Site Giant.

The token you may get from Site Giant site after you log in.

4.2 Basic Configuration

After setting the URL configuration, the next important step is basic configuration.

Basic configuration is the setting of the Site Giant plugin. In basic configuration it is required to set the invoice number, default debtor control account, default item, default GST, sales order details, payment types and tax class.

Go to Site Giant > Basic Configuration.

i.   GST Title – key in the name of gst that you want to set to default. This name must be same as the tax name that has set in Site Giant.

ii.   Invoice No. Follow – to set the invoice no. You can either choose AutoCount or Site Giant invoice numbering format. By selecting AutoCount, the invoice numbering will follow AutoCount's invoice numbers and would change SiteGiant invoice numbers after synchronizing Sales Orders from Site Giant to Autocount. While, by choosing Site Giant, the invoice numbers follow the Site Giant invoice numbering within Sales Order synchronization.

iii.   Default Account Control - To set the default Account Control in AutoCount. This Account Control will be used for creating new Debtors in AutoCount during Customers (Debtors) synchronization. Select the default debtor control account that set in AutoCount.

iv.   Default item – To proceed those items which do not exist in neither AutoCount nor Site Giant but exist in some Sales Orders (especially in 11 Street orders), you would need to

set a default item. This item will be replace with those non-existence items in Sales Orders with you permission during Sales Order Synchronization.

4.2.1 Sales Order Details

As SiteGiant's sales orders may have some extra fields which do not exist in Autocount Accounting system (e.g. FlatRate, Undefined, …), you need to create an item for each one of these extra fields and assign them to their appropriate field.

In this part, we add the field that does not have in AutoCount. For example, in Site Giant orders, there is a field called Flat Rate, but AutoCount's sales order and sales invoice do not flat rate field.

i.   In order to add the field, add flat rate in stock > stock item maintenance.

It is not necessary to key in UOM for this. You can save it without UOM.
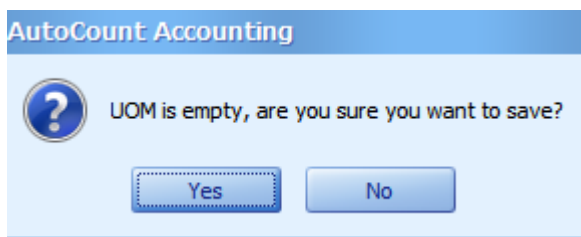
Click No.

ii.   Then, back to Site Giant > Basic Configuration.

In Sales order details, under Title, key in the name "Flat Rate" (the name must be exactly the same in Sales Giant orders). Under Value, select Flat Rate in drop down list. The drop down list is get from stock item maintenance.
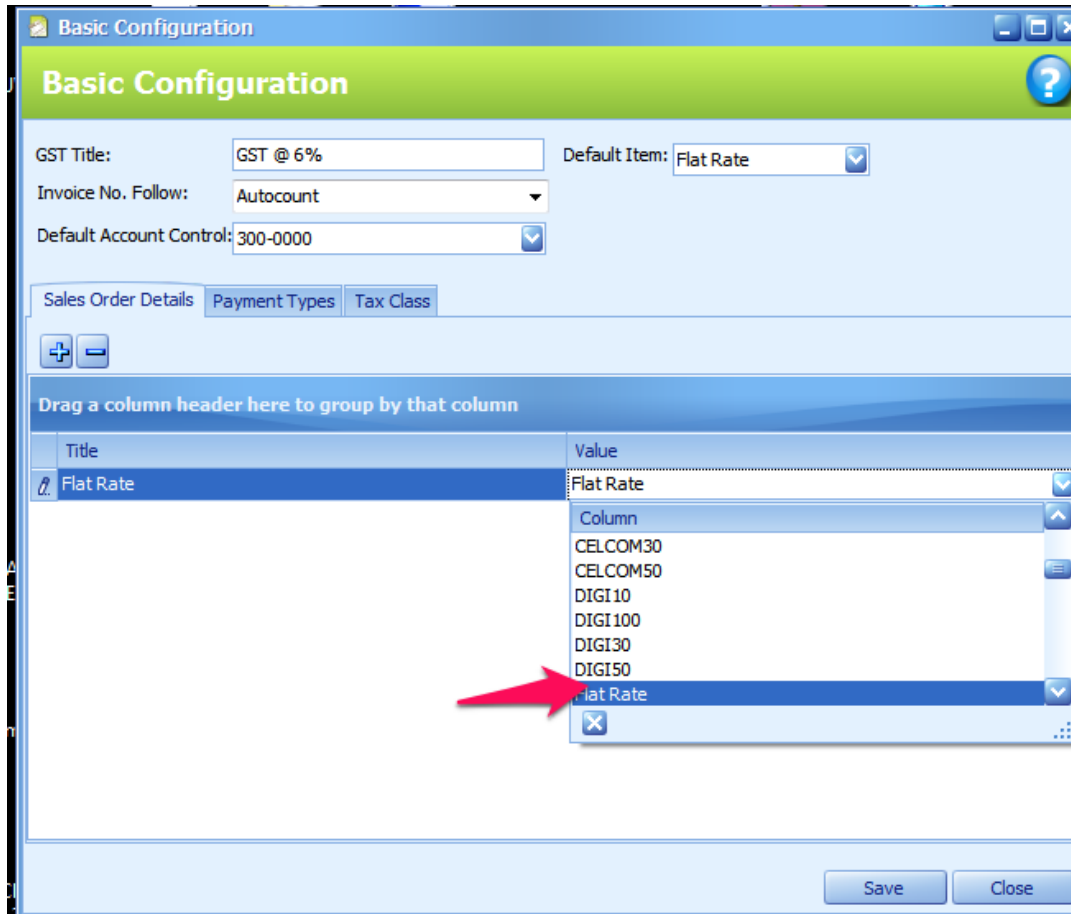
4.2.2 Payment Types

This part is to set the default payment method of channels, so that the payment method is auto-assigned when synchronizing the payment from Site Giant to AutoCount.

i. Title – Enter the name of channel.
    The list of channels are:
    a. 11street
    b. Amazon
    c. Gemfive
    d. Lazada
    e. Lelong.my
    f. Logon
    g. Qoo10
    h. Rakuten
    i. Shopee
    j. My Store

ii. Value – Select the payment method of each channel. You may maintain the payment method at GL > Account Maintenance

iii. Location – Select the sales location. Note: SG is Sales Giant. This location is auto-generated once install the plugin. You may maintain the location in stock > stock location maintenance

4.2.3 Tax Class

Although the tax classes and tax rate has been set in Site Giant, you still need to assign the tax code that have been set in AutoCount for each tax class of Site Giant, so that the tax code is auto-assigned when synchronizing the orders, invoices and payment from Site Giant to AutoCount.

i. Site Giant Tax and description - Site Giant Tax is from the tax classes set in Site Giant. You may maintain the tax classes at Site Giant.

Tax Class

* Tax Class Title: ZERO

* Description: zero rate item

Tax Rate:	Based On:	Priorit
GST @ 0 %	Shipping Address	0

ii.   Tax type – Assign the tax code of AutoCount for each tax class. You may maintain the tax code in GST > Tax Code Maintenance.

Tax Code Maintenance

Hint: Here, you can create/configure your tax code that will be used for Sales and Service Tax (SST) or Goods and Services Tax (GST).

New   Edit   Delete   Configure Malaysia GST

Tax Code	Description	Tax Acc. No.	Tax Percentage	Active	Govt. Tax Code	Is Default?	Is Zero Rate	Use Trans. Tax Acc. No
Supply/Purchase: Purchase								
AJP-APBD	Input Tax 6% - Adjustm...	GST-3010	6	✓	AJP	☐	☐	☐
AJP-ARBD	Input Tax 6% - Adjustm...	GST-3010	6	✓	AJP	☐	☐	☐
BL	Input Tax 6% - Not Clai...	GST-9010	6	✓	BL	☐	☐	☐
IM	Input Tax 6% – Import o...	GST-3010	6	✓	IM	☐	☐	☐
IM-GDS	Purchase Imported Good...		0	✓		☐	✓	☐
IM-SVC	Purchase Imported Servi...		0	✓		☐	✓	☐
NR	Input Tax 0% - Non-GST...		0	✓	NR	☐	✓	☐
TX-ES	Input Tax 6% - To make ...	GST-9010	6	✓	TX-ES	☐	☐	☐
TX-ES-CG	Input Tax 6% - Capital G...	GST-9010	6	✓	TX-ES	☐	☐	☐
TX-I	Input Tax 6% – Importe...	GST-3010	6	✓	TX	☐	☐	☐
TX-S	Input Tax 6% – To Make...	GST-3010	6	✓	TX	☐	☐	☐
TX-Z	Input Tax 6% – To Make...	GST-3010	6	✓	TX	☐	☐	☐
ZP	Input Tax 0% - Zero Rated		0	✓	ZP	☐	✓	☐
Supply/Purchase: Supply								
AJS-APBD	Output Tax 6% - Adjust...	GST-4010	6	✓	AJS	☐	☐	☐
AJS-ARBD	Output Tax 6% - Adjust...	GST-4010	6	✓	AJS	☐	☐	☐
DS	Output Tax 6% - Deeme...	GST-4010	6	✓	DS	☐	☐	☐
DS-I	Output Tax 6% - Import...	GST-4010	6	✓	DS	☐	☐	☐
ES	Output Tax 0% - Exempt...		0	✓	ES	☐	✓	☐
SR-S	Output Tax 6% - Standa...	480-0000	6	✓	SR	✓	☐	☐
ZRE	Output Tax 0% - Zero R...		0	✓	ZRE	☐	✓	☐
ZRL	Output Tax 0% - Zero R...		0	✓	ZRL	☐	✓	☐

After done all the settings, click Save.

5.0 Master Data Synchronize

Before you can synchronize orders, invoice and payment, you need to synchronize the master data such as debtor, item types and item categories from Site Giant to AutoCount.

Go to Site Giant > Master Date Synchronize

5.1 Debtor (Customer)

5.1.1 Synchronize customer

On screen, there is a list of debtor, item type (manufacture) and item categories (which have not been update in AutoCount) from Site Giants.

To import the debtor into AutoCount, tick the debtor that you wish to update to AutoCount and click Update to AutoCount.

Refer to 4.2, the default account control is set in basic configuration. If you wish to change the Control Account of the debtor before updating to AutoCount, you may change it on the Site Giant Master Data screen. Refer to the picture below:
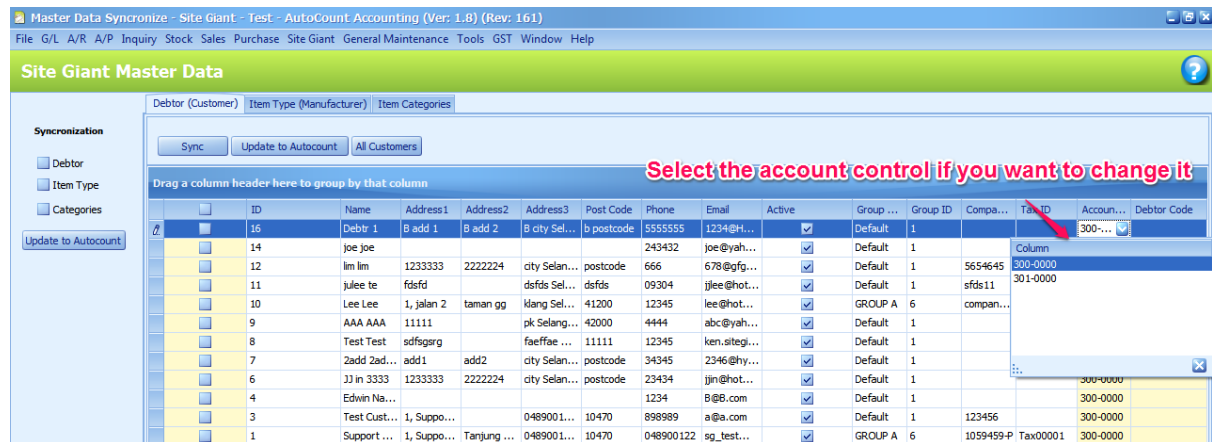
In addition, if you wish to know or customise the debtor code before update to AutoCount, you may select the … button at debtor code column or key in the debtor code that you want.
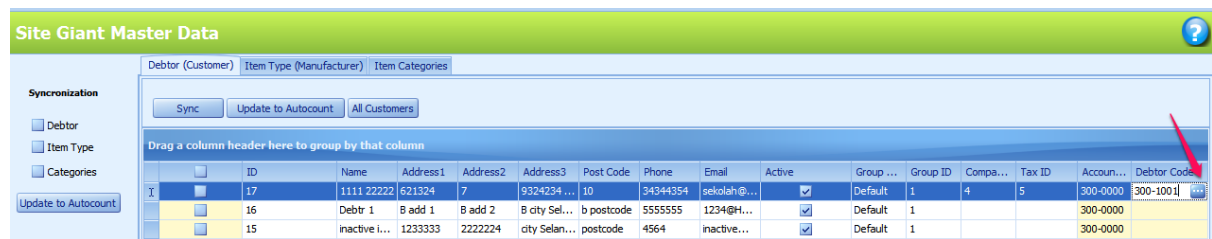
The customer will be updated in AR > Debtor maintenance.

Note that to change the account control and debtor code, only new customers (customers that have not been updated to AutoCount yet) are allowed to be changed at Site Giant Master Data screen. For the customer that already imported to AutoCount, you may change the account control and debtor code in AutoCount.

- To change account control, go to AR > Debtor maintenance
- To change debtor code, go to Tools > Change Code > Change Account Number.

5.1.2 Update customer details

If you already update a customer to AutoCount, and you edit the existing customer details in Site Giant and also wish to update the customer details in AutoCount.

Go to Site Giant > Master Data Synchronization.

On the Screen, click All Customers.
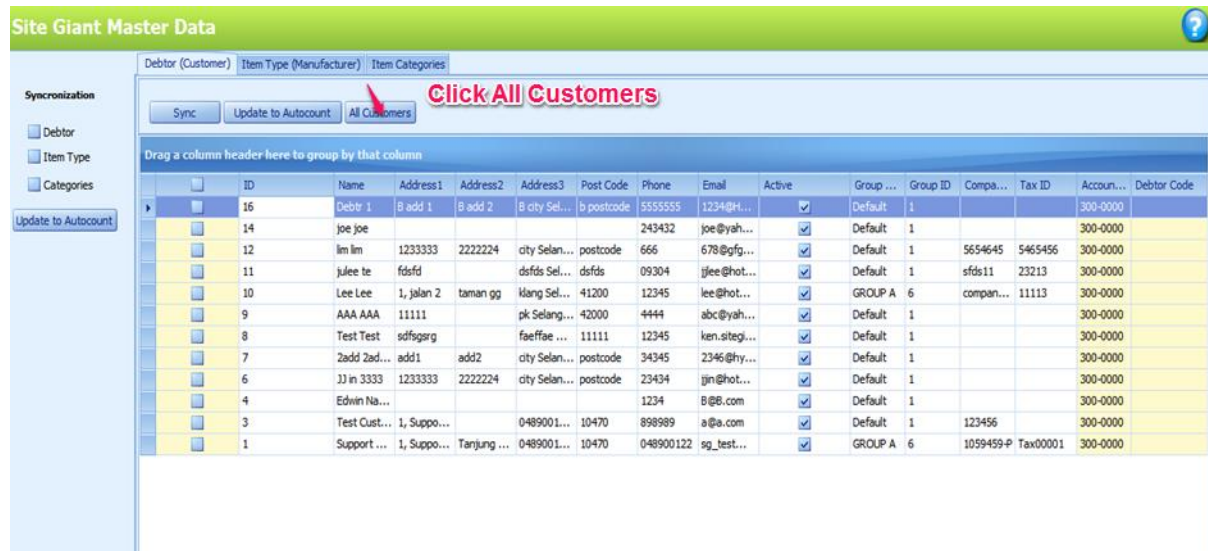
After that, the screen will show you all list of customers that created in Site Giant. Select the customer that you have edited the details in Site Giant and click Update to AutoCount.
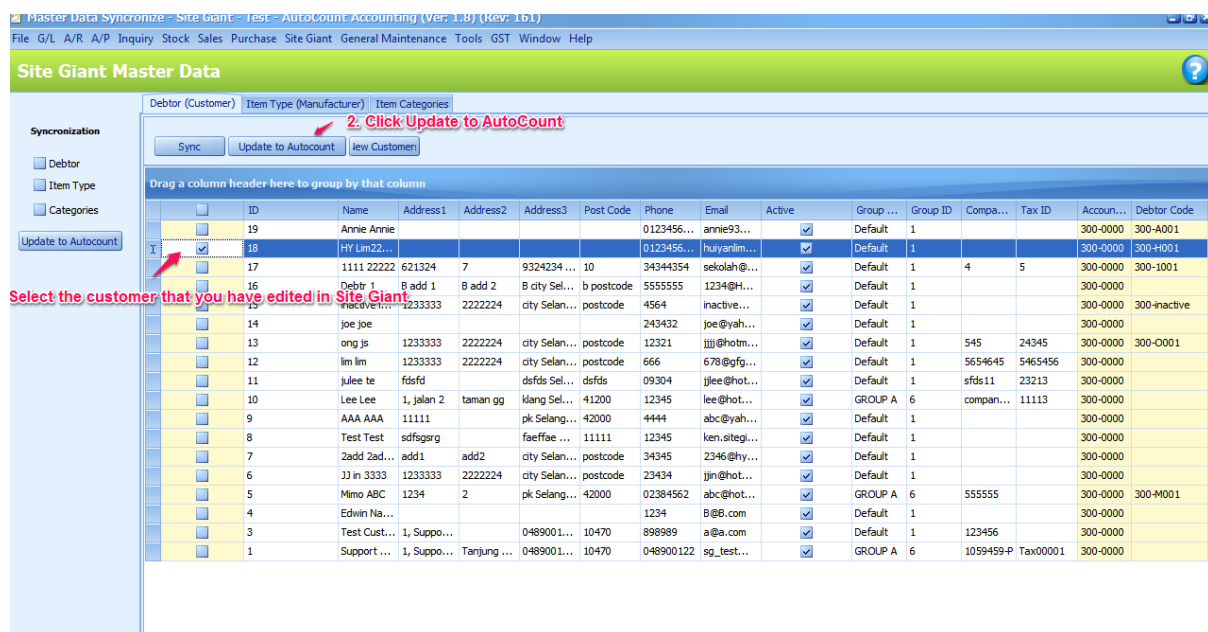
5.2 Item Type (Manufacturer)

Select the item type and click Update to AutoCount.
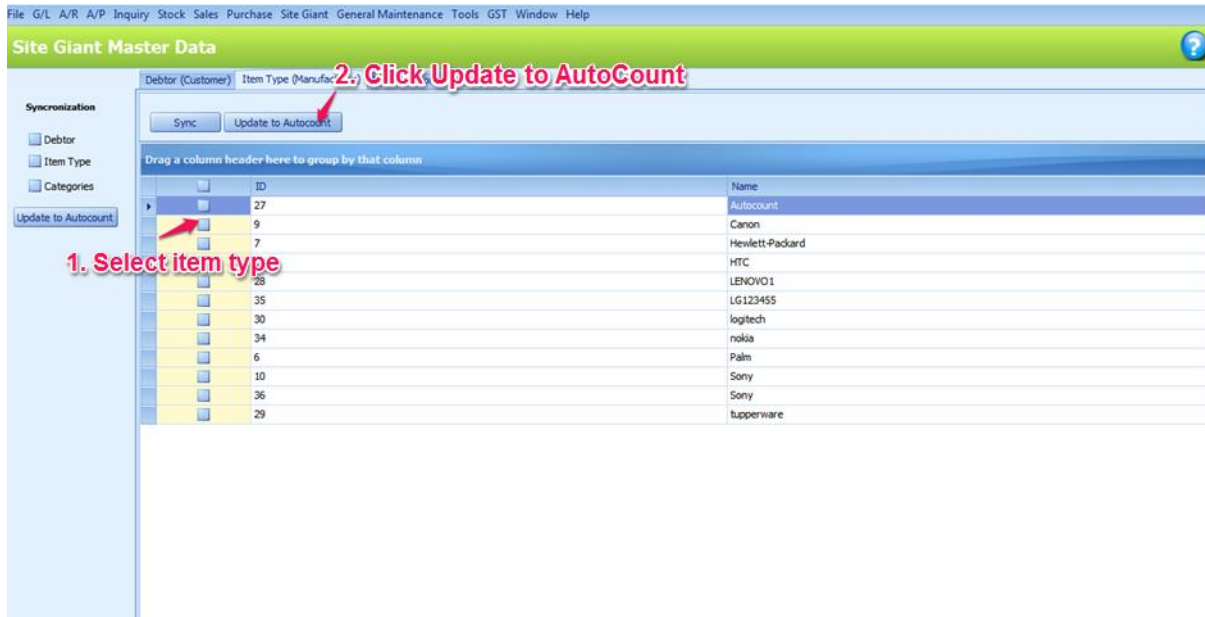
The item type will be updated in Stock > Stock item type maintenance.

5.3 Item Categories

You do not need to select any category. It will update all categories when you press Update to Autocount button.
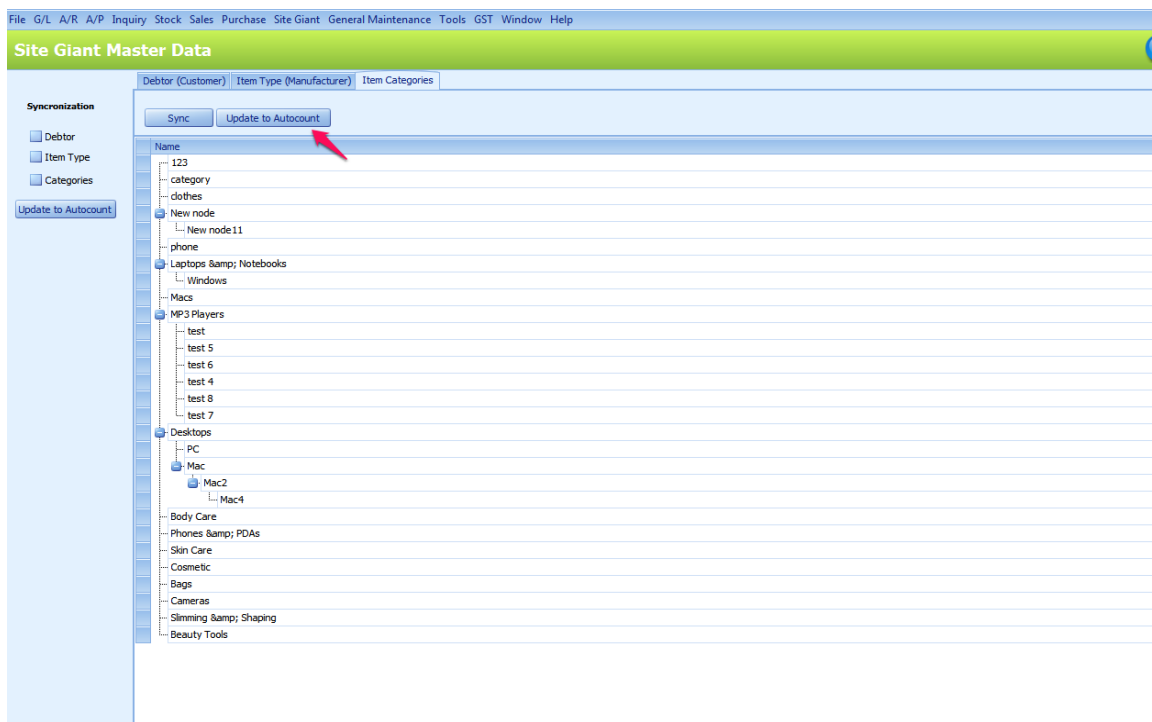
Note:

If you wish to update all debtors, item types and item categories without selecting one by one, you can tick debtor, item types and categories and click update to AutoCount.

6.0 Create online item in AutoCount

Stock > Stock item maintenance

When create new stock item, system will pop out a window below:
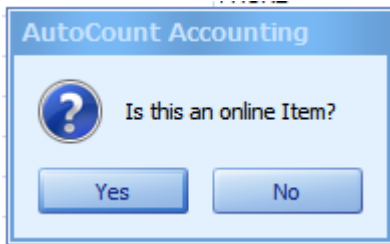
Click Yes if it is an online item.

Key in the item code and name that you want. For example: dress

When double click UOM, system will pop out a window as shown below:

i.   Option Name – specification of the product.
ii.   SKU – model or identification of the specification.
iii.   Online quantity – quantity of item that want to sell online
iv.   Subtract stock – select Yes if want to deduct the stock level when the stock is sold online, or else select No

For example, want to add option name: colour.

After that, key in all the details such as SKU, online quantity and subtract stock.

Then click OK.

Remember to select item type.

Note:

There is an extra button Online Item. If you click NO when system first ask whether you are creating online item, you may tick it here and vice versa.

There are also some additional tabs in stock item maintenance screen:

6.1 Online Descriptions

Description that you wish to show online. You can customise text using the tools below.

| Details | Replacement Item | Alternative Item Code | Image | Further Description | External Link | Note | User Defined Field | Online Discription | Online Highlights | Online What's in the box | Online Item Details | Online Item Images | Online Item Categories |

stylish,pretty dress

OK   Cancel
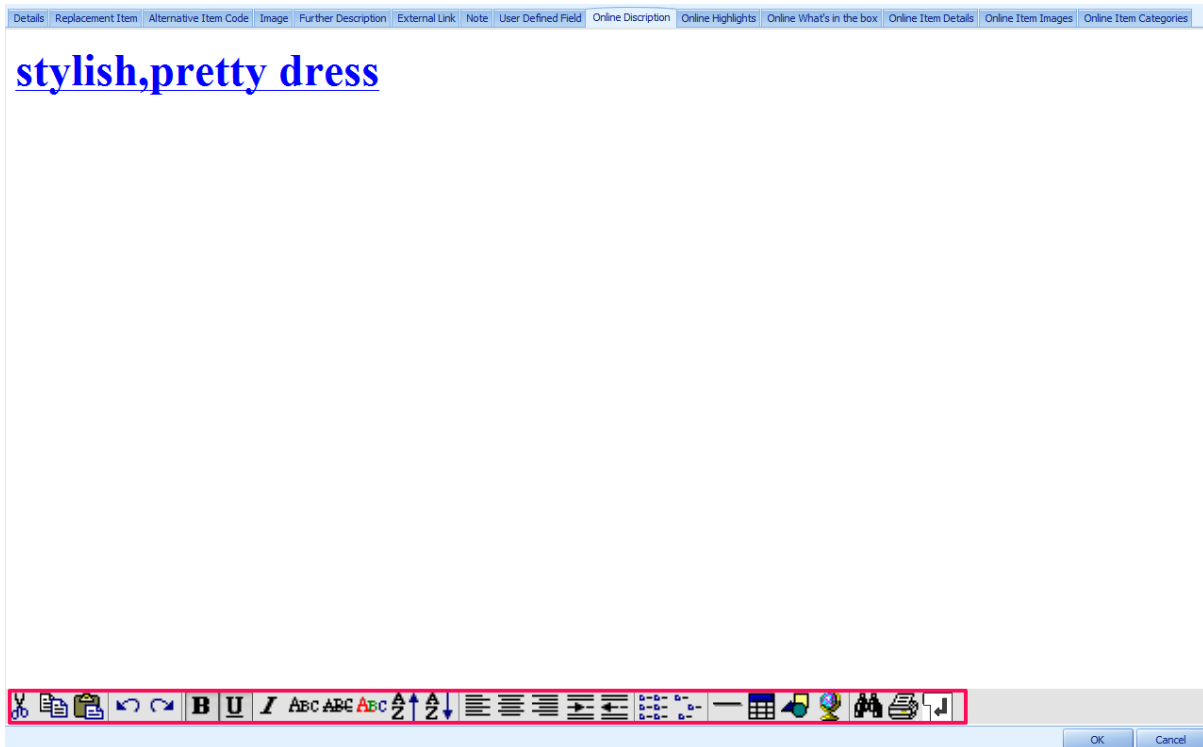
6.2 Online Highlights

You may need to key in highlights of the item. You may customise text using the tools below.

| Details | Replacement Item | Alternative Item Code | Image | Further Description | External Link | Note | User Defined Field | Online Discription | Online Highlights | Online What's in the box | Online Item Details | Online Item Images | Online Item Categories |

originally from Korea

OK   Cancel

6.3 Online What's in the box

You may describe what item contains and details.

6.4 Online Item details

It is compulsory to key in all the details in online item details as the item details will updated in Site Giant and post the item from Site Giant to marketplace. Therefore online item details reflect the presentation of item details on marketplace.
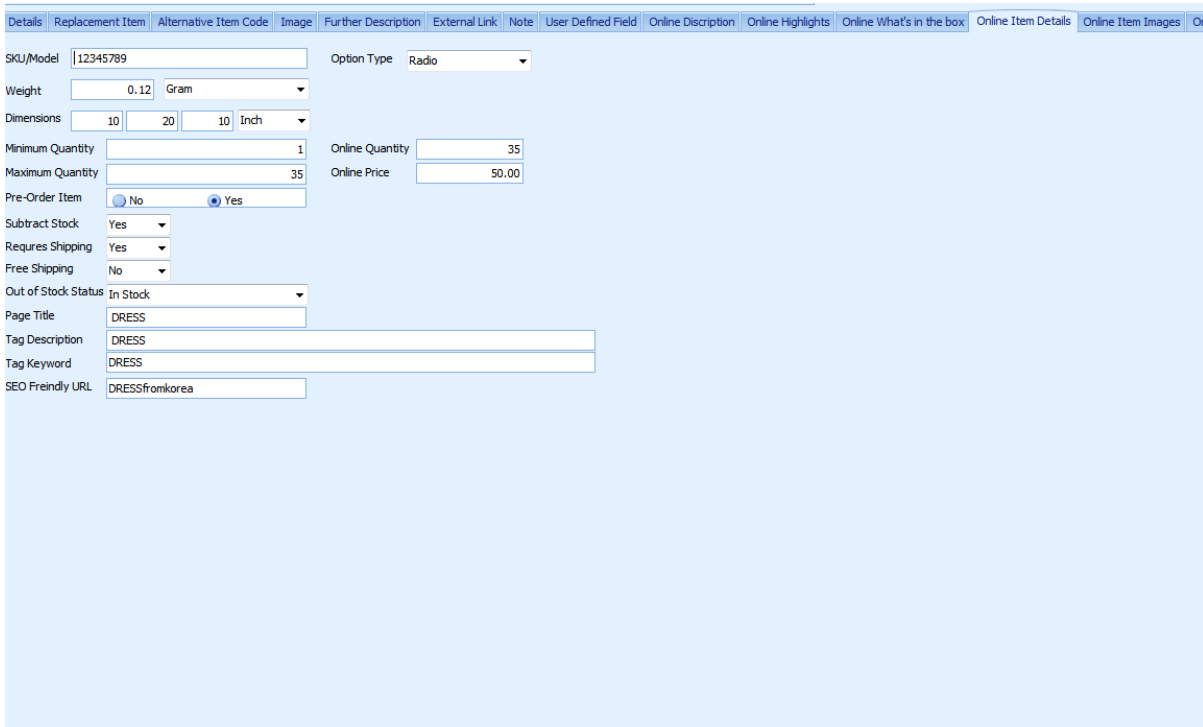
i.   SKU/Model –model or identification of item. It may be alphanumeric or other special characters.

ii.   Option Type – there are 2 types of options: Radio and Select. This will affect presentation of options when the item is uploaded to Site Giant and posted to marketplace via Site Giant.

   a.   If choose radio type, the option name will be presented in radio type selection as shown in the picture below:

   b.   If choose selection type, it will show as the picture below.
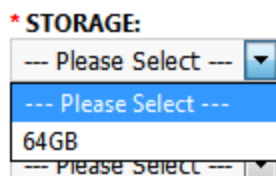
iii.   Dimension – You may key in dimensions of item in millimetres, Inches, kilogram and gram.

iv.   Minimum quantity – the minimum order amount online

v.   Maximum quantity – the maximum order amount online

vi.   Online Quantity – Quantity of item sold online.

vii.   Online Price – item price to be shown online.

viii. Pre-order – select Yes if it is pre-order item, or else No.

ix.   Subtract Stock- select Yes if you want to deduct number of item, or else No.

x.   Requires Shipping – select yes if shipping is requires, else no

xi.   Out of Stock Status- this is to show the stock availability. Types of stock availability include: 2-3 days, In Stock, Out of Stock and Pre-order.

xii.   Page Title – Key in the page title that you want to show in marketplace. It will reflect on top of tab when post item from Site Giant to marketplace.

xiii.   SEO Friendly URL – what you enter in SEO Friendly URL will be reflect on the marketplace item URL after update stock from Site Giant to marketplace.

6.5 Online item image

When stock is upload from Site Giant, the image of the item will be shown. However, if create online item in AutoCount, it is not allowed to load image.
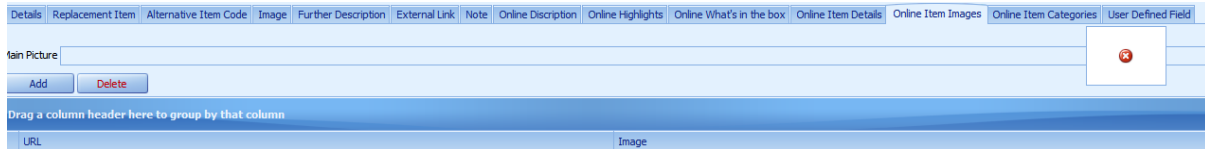
6.6 Online item categories

Select item category that the online item is belonged to.
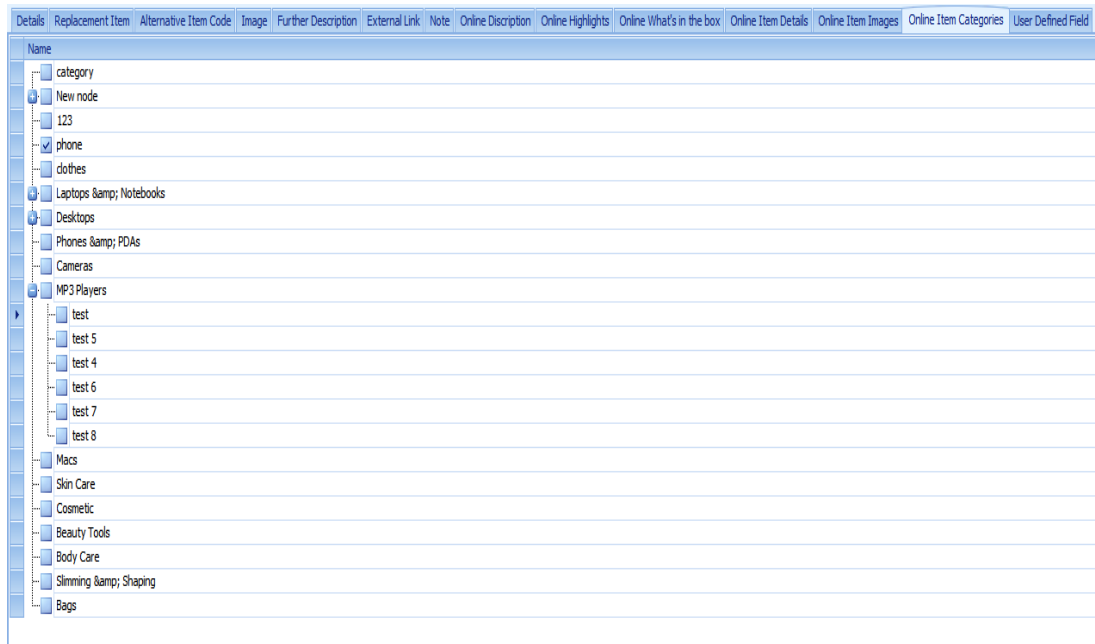
After key in all the details, click OK.
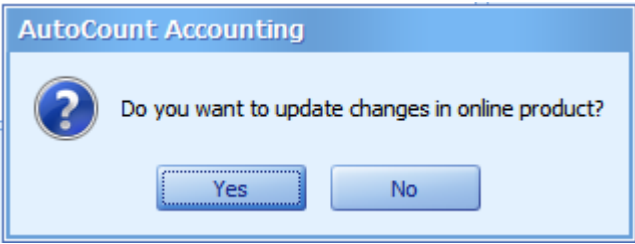
Click Yes.

Note:

To insert an image in online descriptions, online highlights and online what's in the box, first, you may search image using browser and copy the link of image.
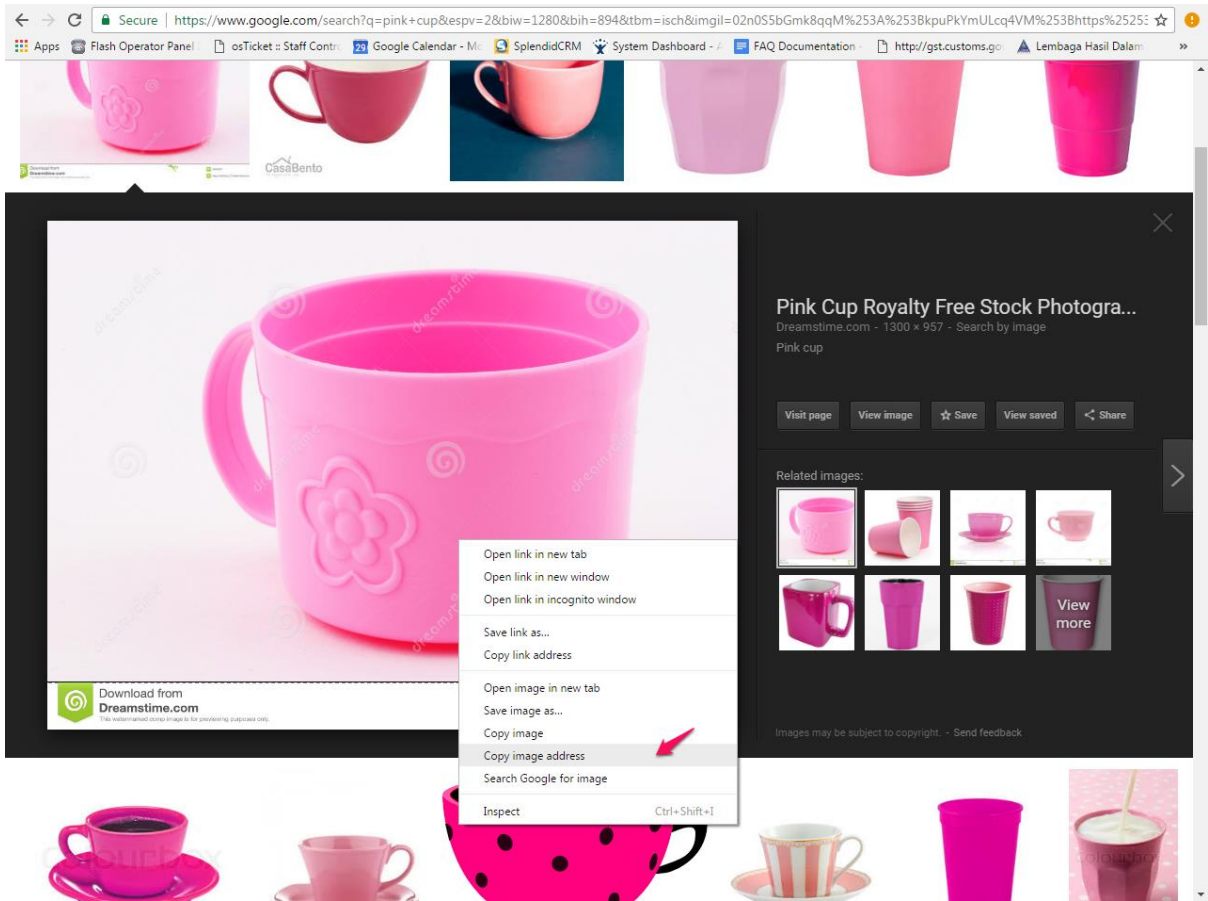
In AutoCount, you paste the address as shown in the picture below:
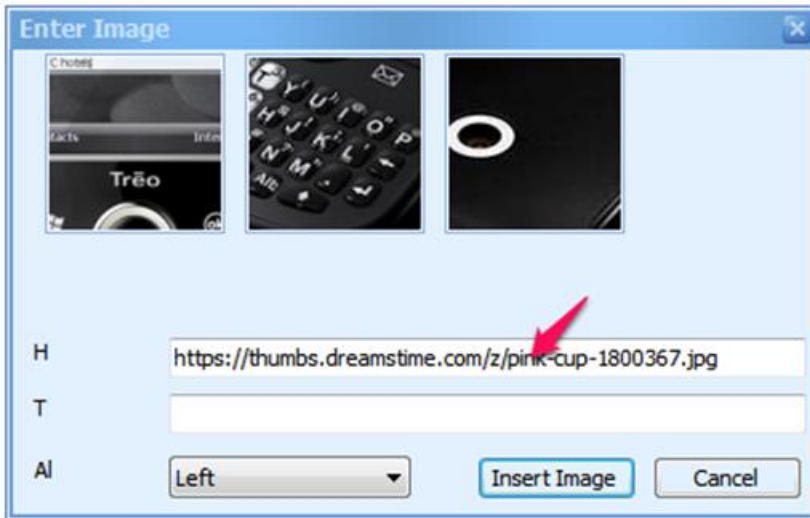
Then click Insert Image.

Then the image is inserted in online description.
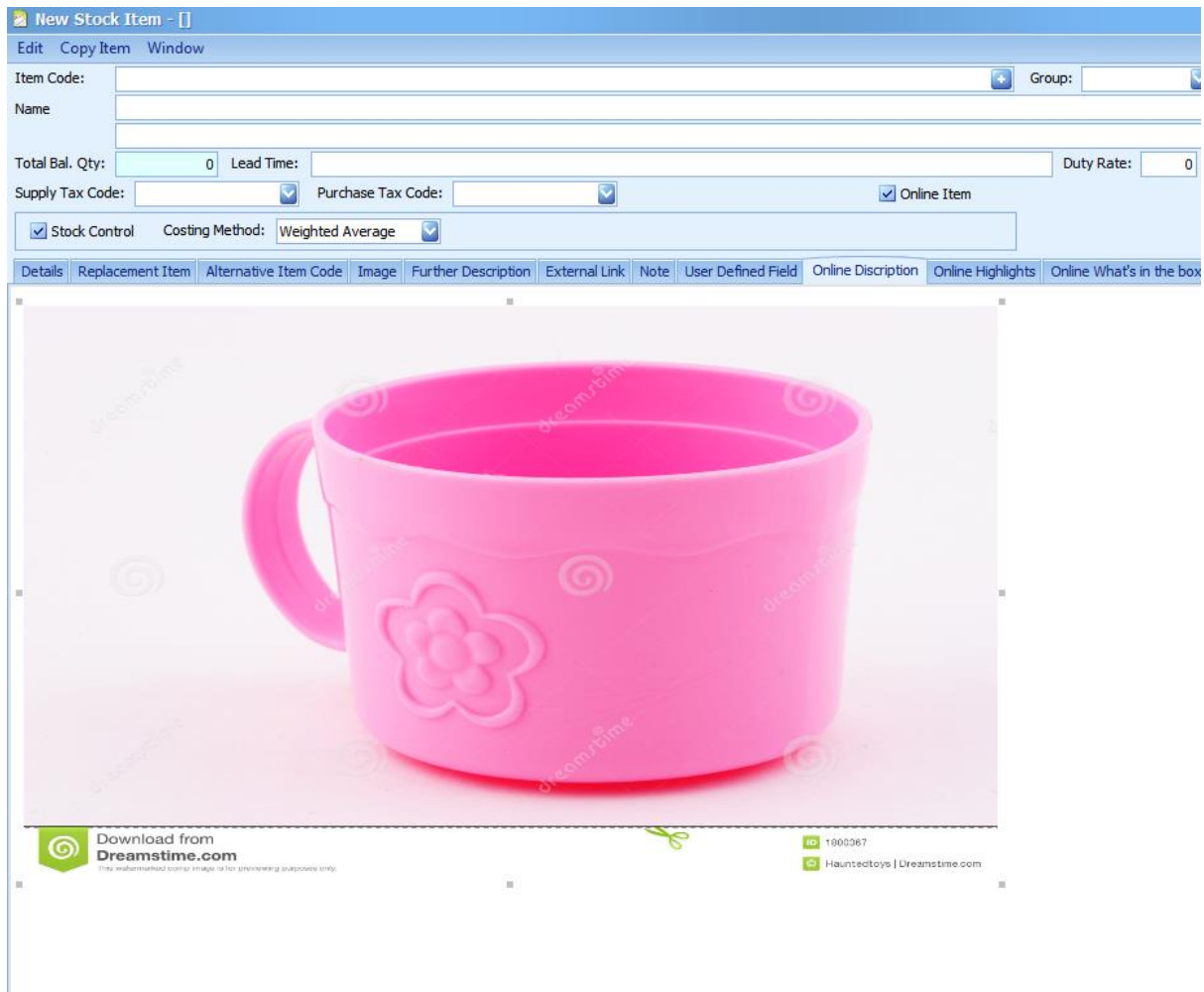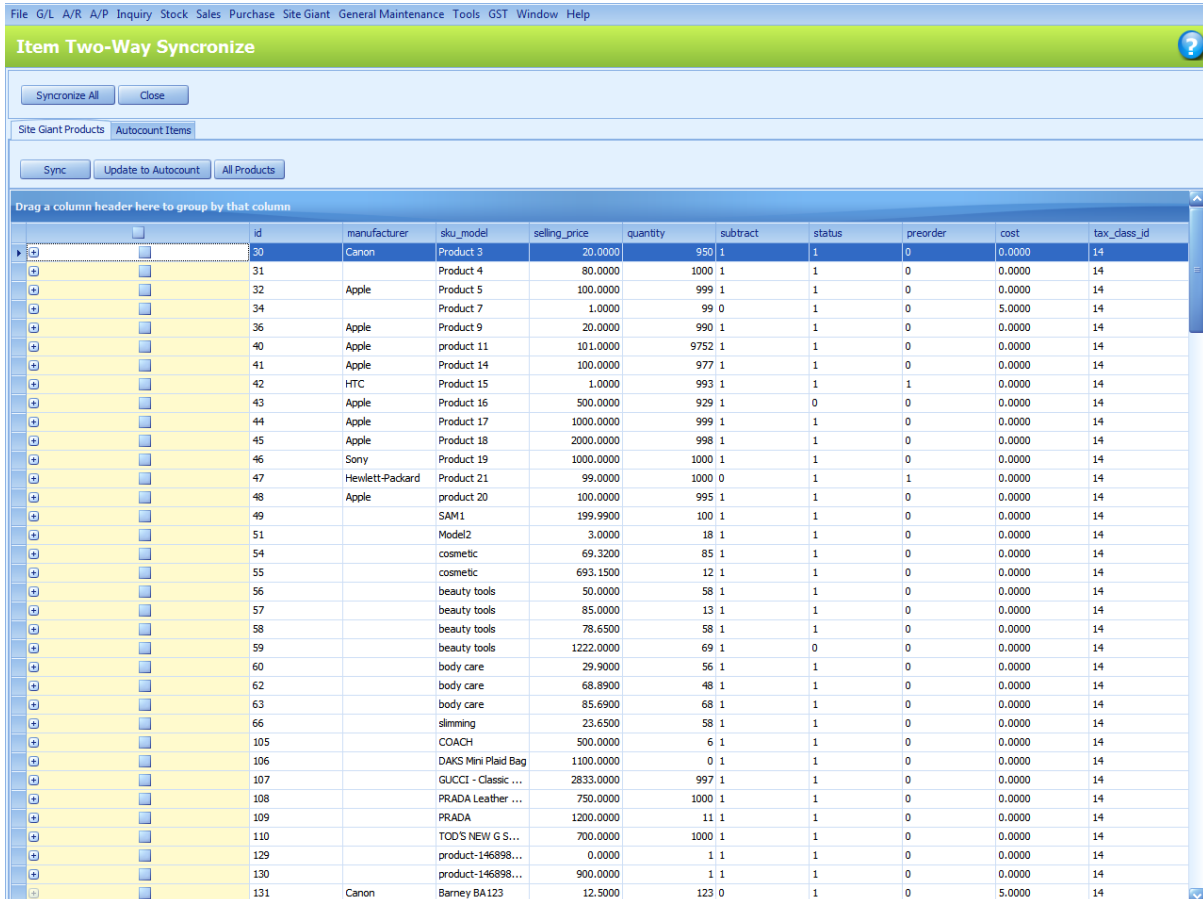
The same method is also applied when inserting image at online highlights and online what's in the box.

7.0 Item Two Way Synchronization

This function is to synchronize the items that create at Site Giant to AutoCount, and also synchronize the item that created at AutoCount to Site Giant. Therefore, it is a two way synchronization.

Goes to Site Giant > Item Two – Way Synchronization

On the screen, there are 2 tabs: Site Giant products and AutoCount items.

Site Giant Products shows the list of item synchronized from Site Giants and ready to update to AutoCount, whereas AutoCount items show the list of items created in AutoCount which ready to be updated to Site Giant.

7.1 Site Giant Products update to AutoCount

If you wish to get Site Giant Products into AutoCount, tick the item you want and click Update to AutoCount.
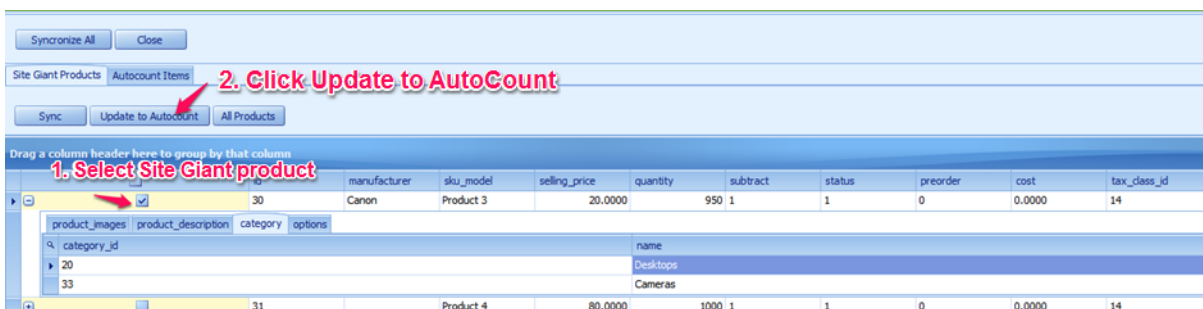
7.2 AutoCount items upload to Site Giant

If you wish to upload the AutoCount items to Site Giant, tick the item you want and click Upload

Note: In stock item maintenance, to check which online item has been uploaded to Site Giant, there is an online ID column. If the online ID is zero, means that the item is not an online item or the item is an online item but has not been uploaded to Site Giant.

Drag a column header here to group by that column

Item Code	Base UOM	UOM Co...	Description	Item Group	Item Type	Stock Con...	Is Active	Total Bal. Qty	Online ID
00001	unit	1	1223123	PHONE	APPLE	✓	✓	0	0
00002	kg	2	testesttes	PHONE	APPLE	✓	✓	0	0
00003	sdadas	1		PHONE	APPLE	✓	✓	0	0
00004	unit	1	asdas	PHONE	APPLE	✓	✓	0	0
162	red	2	noGST12345			✓	☐	-1	320
191	green	2	sellingitemedit			✓	✓	0	191
197	square	4	product-1480901599762		logitech	✓	✓	-2	321
29		1	Palm Treo Pro		Palm	✓	✓	0	29
291	7	2	selling item 10 - test			✓	✓	-1	291
adssa	dfd	1	adssa		DRESS	✓	✓	0	336
APPLE IPHONE 5	PCS	1	APPLE IPHONE 5	PHONE	APPLE	✓	✓	0	0
APPLE IPHONE 6	PCS	1	APPLE IPHONE 6	PHONE	APPLE	✓	✓	0	0
CELCOM10	PCS	1	CELCOM RELOAD CARD RM10	RELOAD	CELCOM	✓	✓	0	0
CELCOM100	PCS	1	CELCOM RELOAD CARD RM100	RELOAD	CELCOM	✓	✓	0	0
CELCOM30	PCS	1	CELCOM RELOAD CARD RM30	RELOAD	CELCOM	✓	✓	0	0
CELCOM50	PCS	1	CELCOM RELOAD CARD RM50	RELOAD	CELCOM	✓	✓	0	0
DIGI10	PCS	1	DIGI RELOAD CARD RM10	RELOAD	DIGI	✓	✓	0	0
DIGI100	PCS	1	DIGI RELOAD CARD RM100	RELOAD	DIGI	✓	✓	0	0
DIGI30	PCS	1	DIGI RELOAD CARD RM30	RELOAD	DIGI	✓	✓	0	0
DIGI50	PCS	1	DIGI RELOAD CARD RM50	RELOAD	DIGI	✓	✓	0	0
DRESS	RED	2	DRESS		DRESS	✓	✓	0	335
Flat Rate		1	Flat Rate			✓	✓	-4	0
HARD DISK	32GB	2	HARD DISK		logitech	✓	✓	0	337
IPAD 2	SILVER	2	IPAD 2 123 6666		Apple	✓	✓	0	333
IPHONE 7PLUS	ROSE GOLD/12...	1	IPHONE 7PLUS		apple phone	✓	✓	0	334
LG110	PCS	1	LG KG110	PHONE	LG	✓	✓	0	0

8.0 Update stock item details after synchronization

Scenario 1:   An item has been synchronized from Site Giant into AutoCount and then the item details is edited in Site Giant. Now, the item details is needed to be updated in AutoCount

Go to Site Giant > item two way synchronization and go to AutoCount items and click Update (refer to 7.1). Then in Site Giant, it will auto-update the details.

Scenario 2: An AutoCount item is updated to Site Giant. Then, the item detail is edited in AutoCount. Now the item detail is needed to be updated to Site Giant.

Goo to Site Giant > item two way synchronization. Click All Product.

Then select the item that you already edit in Site Giant and click Update to AutoCount.

9.0 Sales Invoice and Payment Synchronization

This function is to sync the sales order from Site Giant. When update in AutoCount, it will generate sales order, sales invoice and A/R receive payment.

Goes to Site Giant > Sales Invoice and payment synchronization

In the list of sales order generated from Site Giant, select the sales order that you want and click Update to AutoCount.

Now, check whether sales order, sales invoice and A/R payment are generated in system.

Note:

In Site Giant, only orders with status Completed and Paid will be shown on Get Success Orders From Site Giant screen and ready to be updated to AutoCount, whereas orders with status Pending and Cancelled will not be shown on screen.

	Order ID	Channel	Marketplace Order ID	Customer	Status	Customer Group	Remark	Total	Date Added	Date Modified	Action
☐	97	11 street	201701059692669	Tan Keat Lim	Completed	Default	Completed	RM2.00	05-01-2017 16:15:08	05-01-2017 16:15:09	[Edit]
☐	95	My Store		Test Customer	Paid	Default	Pending	RM110.00	03-01-2017 16:12:20	03-01-2017 16:12:20	[Edit] [Send Invoice]