

AIOA · LOOM OPERATIONS WORKBENCH



AIOA·LOOM

Weave your company's **warp
and **weft** into one clear cloth.**

AIOA·LOOM weaves approvals, projects, finance, bidding and AI proposals into one operating fabric. Once you sign in, every thread moves with your workflow.

27 productized capability modules

AI-native

Private deployment

The business keeps running, but too much of it runs on sheer effort.

Spreadsheets, approval flows, chat groups and shared folders all do their part. But when it comes to **project profit, splitting sales against purchasing, collection progress, staff certificates and year-end bonuses**, the owner still has to chase people for answers. It is not that people are not trying; the tools simply do not fit how the business really works.

Is the project making money?

Figures are compiled by hand at month-end; owners rely on gut feel

Sales vs. purchasing mismatch

One device, several suppliers; items can't be matched line by line

Where are collections stuck?

What's in and what's outstanding takes a round of calls

Approved, then it stalls

Execution records, signatures and filing still depend on someone following up

Certificates about to expire

You find out at bid time that one has lapsed; nobody reminded you

How to split year-end bonuses

Without data to back it up, it comes down to impressions

Ready to upgrade, but nothing quite fits.

There is no shortage of tools; the right one is hard to find. When a small or mid-sized business wants to get its operations in order, the options tend to be either too heavy or too disconnected.

OPTION 1

Heavyweight suites

High budgets, long implementations and complex processes suit large organizations. Smaller firms often end up with **"a huge system, while the business still lives in spreadsheets."**

OPTION 2

Generic collaboration

Great for chat, approvals and notifications. But business data such as **contracts, purchasing, projects, invoices, payments and profit** rarely connects into one thread.

OPTION 3

DIY low-code

Quick to build single forms and light workflows. Once you hit **multiple contracts, items, attachments, approval steps and role permissions**, maintenance quickly becomes a burden.

What smaller businesses really need is an operating foundation that is [affordable, adaptable, and built for how real business works.](#)

So we built AIOA·LOOM.

It is not an enterprise system shrunk down, nor a platform you have to build from scratch. AIOA·LOOM grew out of **the day-to-day operations of a bid-driven systems integrator**, weaving bidding, contracts, purchasing, projects, approvals, finance, HR, documents and AI into one privately deployed operations workbench.

Built for real business

Order splitting between sales and purchasing, item-level matching, project profit, invoices and collections, approval follow-through and filing all flow along one operating thread.

AI inside the work

Leading large models are wired into real business processes. Not a chat box floating outside the system, but part of bidding, pricing, checks, data questions and document work.

Clarity for the owner

Cash on hand, project profit, stuck collections, staff certificates, year-end bonuses: every answer goes back to data and process.

What follows is not a feature list but a **"warp and weft" map** of how a small or mid-sized business really runs.

We ran this system in our own business first.

AIOA·LOOM was not dreamed up in a lab. We are a small IT company that has spent years bidding, integrating systems and delivering projects. **Splitting sales against purchasing, re-checking bid materials, tracking project profit and collections:** we faced these problems every day. So we built our own operating foundation, used it in our own business, then turned it into a product for companies like ours.

Knows the business

Grown from real operations:
bidding, contracts,
purchasing, projects and
collections

Used in-house first

Proven in our own
business, then refined
continuously against real
workflows

Private · Evolving

Private deployment, data
managed by your company,
and room to grow as the
business changes

Contents

CONTENTS · 60P

★ Flagship · 3 pages

● Opening

Product Overview · One Operating Fabric	07
Capabilities · Four Warps × Wefts	08

● I · AI Intelligence

AI Assistant <small>SPOTLIGHT</small>	10–19
Smart Inspection Center ★	20–22
AI Proposal Writing	23
Bidding Workflow	24
Bid Document Check	25–26
Pricing Decision Toolkit	27
Counterparty Risk Due Diligence	28

● II · Business OA

Approval Center ★	30–32
Finance Management	33
Finance · Receivables Ledger	34
Sales & Purchase Contracts	35–36
Project Management ★	37–39
Business Partners	40
Task Center	41

● III · Organization & HR

HR Management	43
Organization & Permissions Foundation	44
Mobile Work & Attendance	45
Mobile App · Workbench / Alerts	46–47
WeChat Mini Program · Attendance	48

● IV · Document Governance & System

Official Document Center	50
Company Mailbox · Send / Auto-sort	51–52
Shared Account Register	53
Outbound Files · Watermark / Metadata	54
Audit Log	55
System Settings · AI Center	56
Deployment · Launcher / Data Backup	57–58
Collaboration & Support · Get in Touch	59

Story arc · From fabric to knots

Overview: "it's one fabric" → Capabilities: "how warp and weft interlace" → flagship deep dives → standard modules close the loop → compact pages prove the foundation → CTA and support.

Screens show the Chinese-language interface; English UI availability depends on deployment.

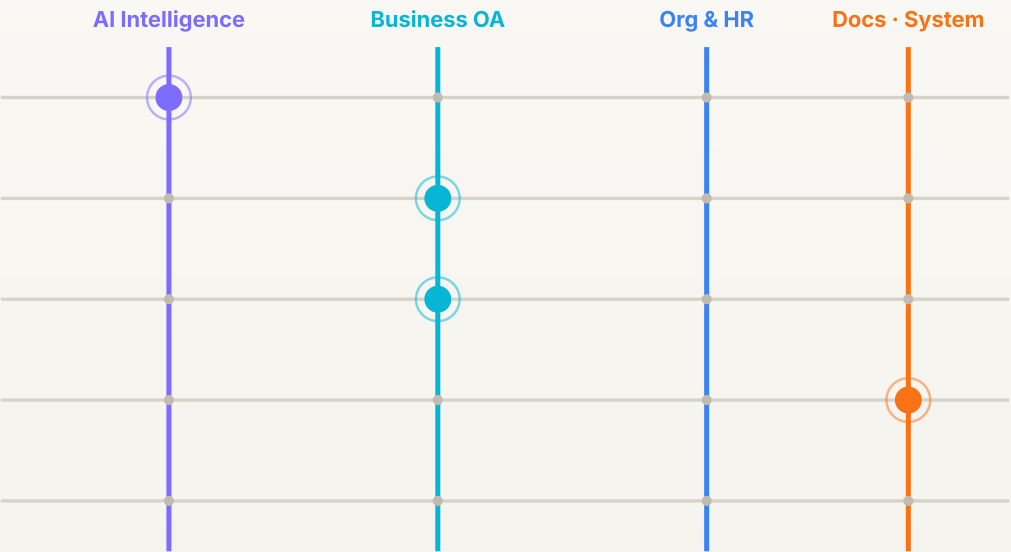
27 product modules, woven into one operating fabric.

The vertical threads are **capabilities**; the horizontal threads are **business flows**. From onboarding, project kickoff and contract purchasing to approvals, bookkeeping, bidding and AI proposals, it is all woven into one system. **The value lies where they intersect.** The name says it too: a loom (*jīzhù* in classical Chinese) is where threads become cloth.

Warp = four capability pillars

WARP × WEFT

Faster bids



Compliant filing

Weft 1 Bidding Weft 2 Documents Weft 3 Projects Weft 4 Field inspection Weft 5 Governance

27

Productized modules

Isolated DBs

Per-domain
databases

260+

Fine-grained
permissions

1 system

Private deployment

Four warp threads that weave everyday operations.

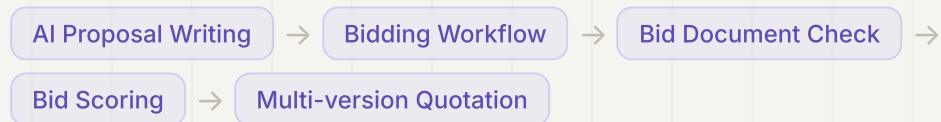
The warp is **capability** (four pillars); the weft is **business flow** (bidding / approvals / projects / inspection / governance). Modules are not isolated boxes but knots threaded together by business lines.

■ AI Intelligence ■ Business OA ■ Organization & HR ■ Document Governance & System

AI Assistant CROSS-LINE AI ENTRY - - - - - One question across all five lines, read-only

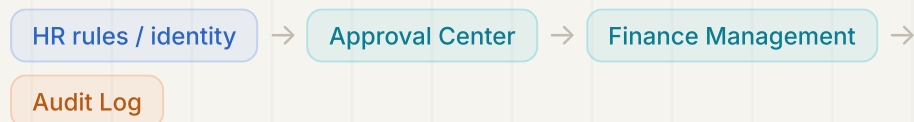
Bidding

WEFT 01



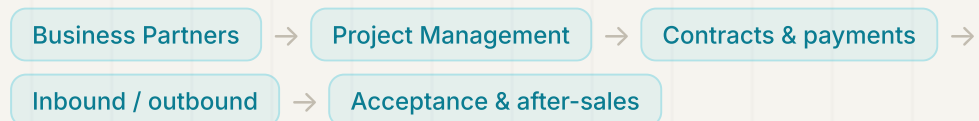
Document execution

WEFT 02



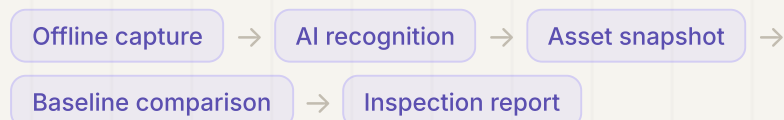
Project operations

WEFT 03



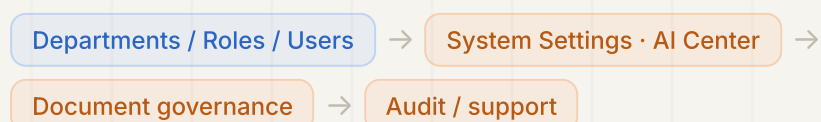
Field inspection

WEFT 04



Governance

WEFT 05



AI Intelligence

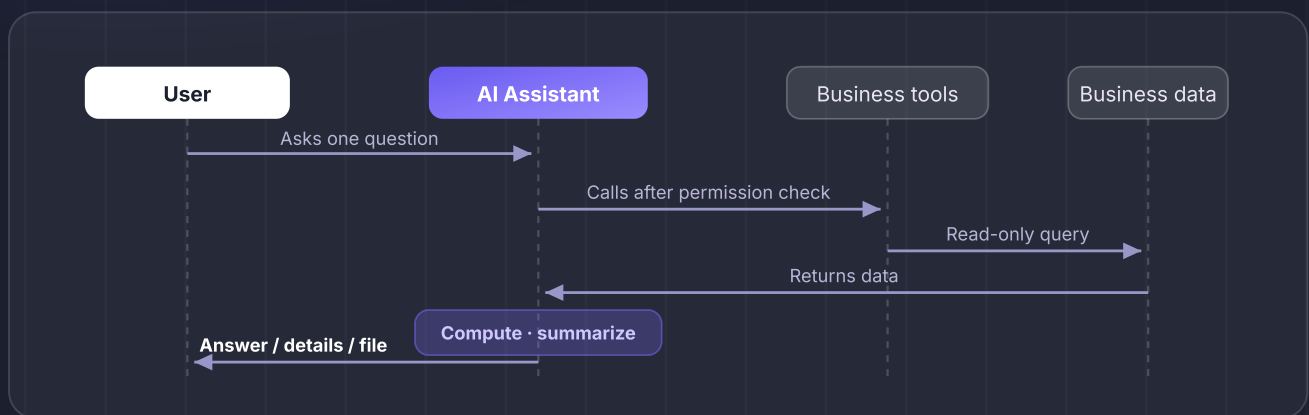
CHAPTER I

Hand repetitive brainwork to AI: parsing tenders, checking bid documents, recognizing assets, scoring bids, drafting proposals, vetting counterparties. AI that does real work, not decoration.

AI Assistant SPOTLIGHT • 10 PAGES	10-19
Smart Inspection Center FLAGSHIP	20-22
AI Proposal Writing	23
Bidding Workflow	24
Bid Document Check AI CHECKS	25-26
Pricing Decision Toolkit	27
Counterparty Risk Due Diligence	28

Business, cash, collections: just ask in one sentence.

Data sits in several systems, someone has to export spreadsheets, and summaries lag behind. With the AI Assistant, staff ask in **everyday language**; it reads connected AIOA data **within their own permissions**, fetches, calculates and summarizes, then returns a conclusion, details or a downloadable file.



Owner

Business · cash-in · risk

Finance

Cash · payments · invoices

Project manager

Progress · cash-in · files

HR · Bidding

Certs · references · staff



How much has the XX Airport project made? Is our cash flow negative right now?

SAMPLE DATA · DEMO ONLY



XX Airport project: contract value ¥32.0M · collected ¥21.0M (66%) · costs ¥24.6M · gross profit to date ¥7.4M (margin ~23%) · outstanding ¥11.0M (¥1.8M overdue).

Cash in/out (this month): received ¥18.5M / paid ¥23.0M / net **-¥4.5M** → a net outflow this month, based on recorded receipts and payments.

From one question to business data — the lookup chain runs itself.

Staff don't need to know which table holds the data or jump between modules. The AI Assistant **turns plain-language questions into business tool calls**, then retrieves, calculates and summarizes within read-only permissions — returning a readable conclusion and a downloadable document.

Users Owners · Finance · Project managers · HR — if you can type, you can use it



Chat front end Plain-language entry · Streaming answers · Visible tool steps



Agent service layer · native engine

Tool-call loop · Persistent sessions · Permission checks · Sub-agent dispatch

AI gateway

Multiple models · connected per deployment



Tool layer · 45+ read-only business tools Projects / Finance / HR / Approvals / Bidding



Data layer

Projects

Finance

HR

Approvals

Bidding

Plain-language entry

Just type — no reports to learn

Tool-based retrieval

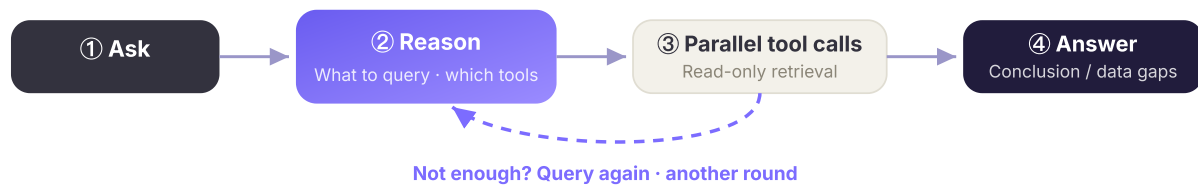
Questions become tool calls, within permissions

Downloadable results

Export conclusions and details as files

Not a hard-coded flow — an agent that works out the next step.

For complex, cross-module questions it **decides what to look up** → **calls read-only tools in parallel** → **reviews the results** → **then decides whether to query more, merge or calculate** — until it reaches a conclusion or states which data is missing.



Decides for itself

Judges what to look up and whether to dig further; one question may take several tool calls.

Parallel calls

Independent tools run at the same time, so even complex questions are answered faster.

Results feed back

It reviews results before choosing the next step, instead of following a fixed script.

Cross-domain tasks can be delegated to Project / HR / Finance / Approval specialist sub-agents (see p. 17); each retrieves data within its own domain and the user's permissions, then the answers are combined.

You don't need a better search box — you need an assistant that reasons.

A search box only matches the exact criteria you give it. The AI Assistant understands vague everyday phrasing, reasons across fields, does the math across modules — and can even find what *should* be there but isn't.

What you want to ask	Ordinary search box	AI Assistant
"That travel claim from Kevin, a few thousand or so"	Needs the exact amount / number / category first	Even vague requests get candidates + evidence + items to confirm
"How much did the airport project make — is cash flow negative?"	Returns a pile of records; you do the math	Pulls project + finance data and computes the metrics
"What's still missing on this project?"	Can only find what exists	Finds what should exist but doesn't and reports gaps

Q Kevin had a claim last month — travel or client entertainment, a few thousand. Find it for me.

[Sample data](#) · [Demo only](#)

A **Candidate 1:** Kevin Zhao · 6/12 · Travel reimbursement ¥4,860 · Purpose "Site trip for the airport project (hotel + transport)" · Paid · Linked to the airport project.

2 similar claims for you to confirm: Entertainment ¥3,200 (6/3) / Travel ¥5,400 (6/20).

45+ read-only business tools across five business domains.

Everything you can ask about comes from data already in AIOA. As the toolset grows, tools are **retrieved and loaded on demand** — only what the question needs — so the complexity never lands on staff.

Project Management

Progress · Document completeness · Ledger · Collections

Finance

Account balances · Income & expenses · Claims & payments · Invoicing

HR

Attendance · Payroll · Employee files · Certificates

Approvals · Bidding

Awaiting my approval · Invoicing & leave · Bid materials

Preloaded tool list

Tools $\leq$ threshold: all tool descriptions and call formats are provided up front for faster responses — it loads tool descriptions, not business data.

On-demand retrieval

Tools $>$ threshold: relevant tools are found first, then loaded — room to keep growing without slowing down.

Try asking · by role

Owner How much was collected this month? Which projects carry the most risk?

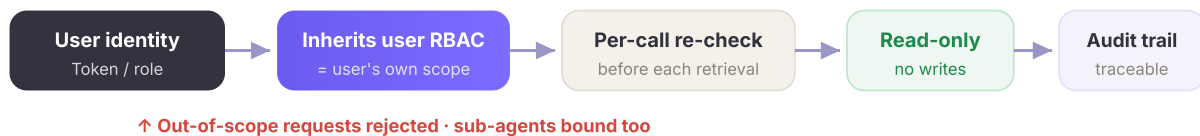
Project manager Which projects lack acceptance documents or unsigned equipment receipts?

Finance Which payments are approved but not yet made? Which invoices are unpaid?

HR · Bidding Whose certificates expire soon? Who is eligible for this bid?

If an employee can't see it, the assistant can't fetch it.

Business AI is only worth using if it is **under control**. The assistant strictly inherits the user's own RBAC, re-checks permissions before every retrieval, stays read-only throughout, and logs every action for audit. Out-of-scope requests are rejected by the permission check — sub-agents are bound by the same limits.



Inherited permissions

No new access paths: the employee's permissions are the assistant's boundary — no separate AI permission set to maintain.

Read-only, no writes

It only reads and summarizes, never modifies business data — reducing the risk of accidental changes by design.

Re-check · Audit trail

Checked again before every retrieval; every action is traceable and can be reviewed for compliance.

It reads images and documents — and fills in templates.

Images are read directly by a vision model (content and chart trends); Word / Excel / PDF files become reference text; give it a general template and it reads the structure, **fills in the figures and produces the file.**

IMAGES

Visual reading

Reads chart trends and visible details, instead of reducing them to a few lines of text

DOCUMENTS

Reference text

Document parsing with OCR fallback — handles mixed text and images

TEMPLATES

Read structure · fill data

A general engine that needs no placeholders; outputs a downloadable file

Q What's still missing on the Harbor Data Center project in Project Management? What needs to be added?

[Sample data](#) · [Demo only](#)

A **To-do list:** Contract attachment not uploaded · Collection plan not set up · Acceptance form missing 2 items · PM certificate not linked · Phase acceptance form not archived.

Gap alert: The contract attachment and collection plan are missing — suggest completing these first.

Scope: Attachment handling is for reference reading and general template filling. It is not dedicated tender-document parsing, automatic scoring, automatic bid-document generation or acceptance-report generation.

One assistant, a team behind it; follow-ups that stay on track.

Complex cross-domain tasks · delegated to specialist sub-agents (each retrieves within its domain and your permissions → combined answer)

Lead assistant

Understand · Delegate · Combine



Projects

HR

Finance

Approvals

Follow-up questions · context managed dynamically against a token budget (keeps the most recent and relevant turns)

Earlier turns
dropped over
budget

← Counts back from the latest turn up to a safe limit: change the metric, name a project, add conditions — keep drilling into the same topic.

Who does what: the AI Assistant **answers business questions** · Smart Inspection (IIC) **handles the field** · AI Proposal Writing **drafts documents** — three distinct AI capabilities. The AI Assistant works across the business horizontally, while specialist modules such as IIC create, confirm and record data where the work happens. One runs across, the others run deep — each complements the other.

Specialist roles

Own domain · own permissions

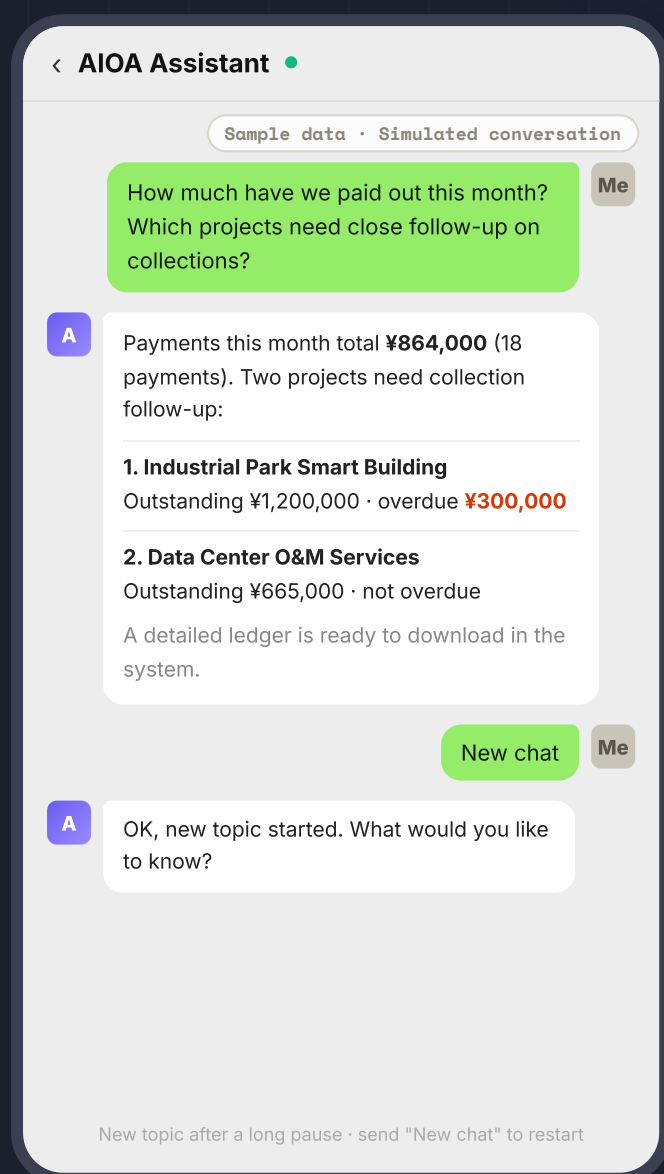
Persistent sessions

Follow-up questions

Multiple models · private deployment

No app, no browser — ask about your business in WeChat.

In the car, on site or between meetings, an owner who wants to know "how much did we pay out this month?" just asks in WeChat. It's the same AI Assistant — **your own permissions, real business data, answers with document numbers** — only the entry point has moved into the app you already open dozens of times a day.



Bind and go

Scan a QR code in the Message Center to bind your personal WeChat, then just send a message.

Same permissions

Data you can't see in the system can't be retrieved in WeChat either.

Formatted for WeChat

Tables, bold text and lists display properly — long tables don't collapse into one block.

Verifiable answers

Every record cited carries its document number, easy to check back in the system.

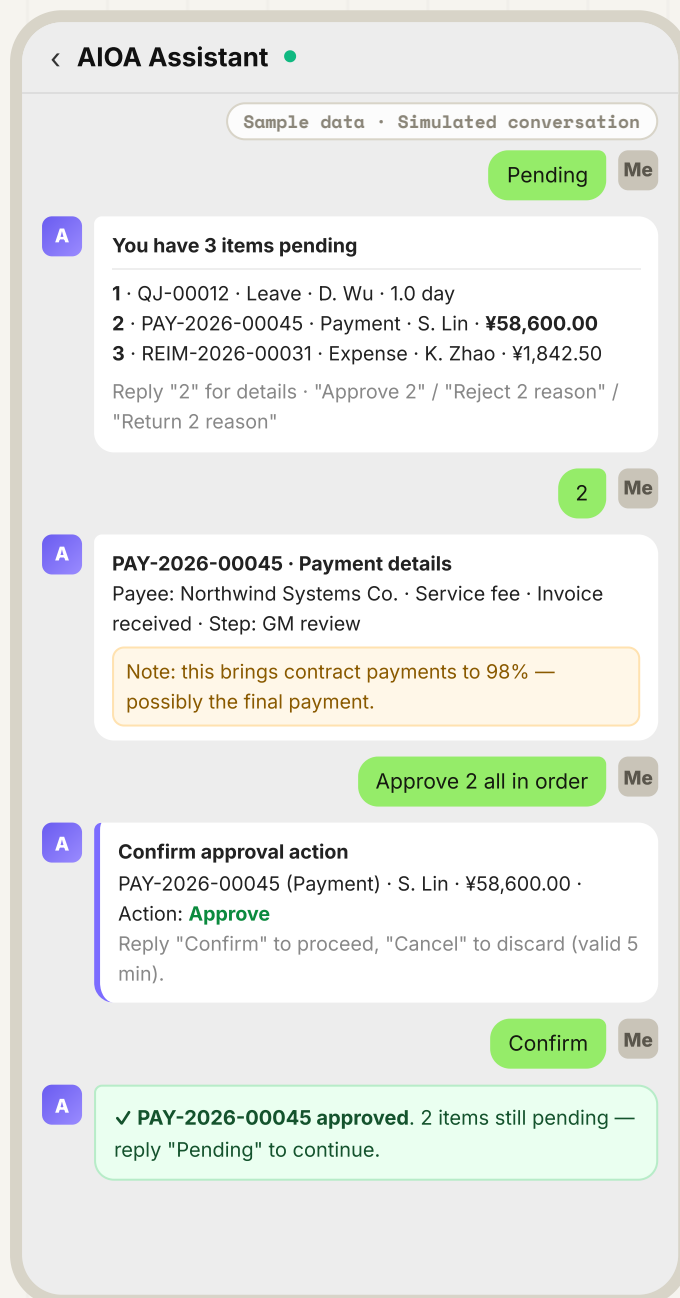
Company-controlled

Turn the WeChat assistant on or off in the AI Center; takes effect on save.

Notifications ride the same channel: approval to-dos and document results are pushed to WeChat, with receipt images and attachments viewable right there (compact or full layout). You can also send images and files to the assistant. Delivery is maintained server-side and continues after a system restart.

Reply "Approve 2" — and the approval is done in WeChat.

Send "Pending" for a numbered list, then reply in one line to approve, reject or return. The decision is always yours: the system first **restates the document**, then waits for your **confirmation** — signatures and records follow the same track as in the system.



The point isn't speed — it's **confidence**. Four guardrails make WeChat approvals as rigorous as approvals in the system:

- 1 Only items awaiting you**
Documents that aren't yours to approve never appear in the list.
- 2 Fixed commands, no AI guessing**
Approve / Reject / Return follow a fixed format. AI only lists documents and looks up details — it never decides for you.
- 3 Restatement + second confirmation**
It restates which document and what amount, and acts only when you reply "Confirm" within 5 minutes; otherwise it expires.
- 4 Same audit trail as the system**
Comments and e-signatures go into the approval record as usual, fully audited — a WeChat approval and an in-system approval are the same workflow.

Reject / Return supported

Commands shown in English for illustration

Document numbers work too

Can be disabled in AI Center

Boundary: every query and approval in WeChat follows the user's own permissions and approval workflow in AIOA. The WeChat entry point comes with your private AIOA deployment — **data stays on your own servers**.

The client site may be offline. The inspection still gets done.

Many client intranets block direct internet access for security, so a browser tool can't reach the devices. The **offline agent** runs on the engineer's laptop: it captures inside the intranet, caches while disconnected, and uploads in one click once back online.

STEP 01

Client intranet

Routers / switches

Servers / hosts

Topology / ports



STEP 02 · OFFLINE

Offline agent

Standalone Tauri 2
desktop app
macOS / Windows / Linux
Built-in SQLite · records
offline

● Credentials AES-256-GCM
encrypted



STEP 03 · ONLINE

One-click upload to AIOA·LOOM

Grouped by session
ZIP packaging + SHA256
dedup
Repeat uploads detected,
not redone

Upload output · three evidence files

result.md

Command output

manifest.json

Run metadata

commands.jsonl

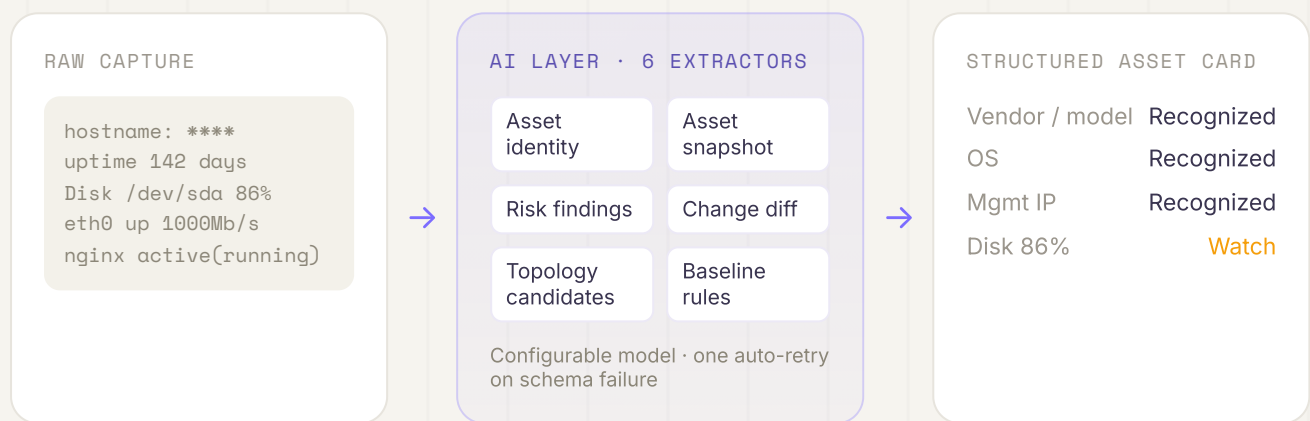
Per-line commands



Raw capture is not an asset.

A confirmed, structured snapshot is.

Uploaded command output can't be treated as assets as-is. **Six extractor types run in parallel**, turning unstructured field data into structured asset facts, stored in tiers by confidence. AI speeds it up; people keep control.



Confidence gating · three outcomes

● Auto-stored

≥ 0.85

High confidence becomes an asset snapshot directly.

● Human review

0.60 – 0.85

Stored after an engineer confirms it on the snapshot page.

● Saved only

< 0.60

Kept out of core facts, pending re-recognition.

Capturing is the easy part. The value is in change and reports.

The first inspection sets the asset baseline. Follow-ups are compared automatically with a **JSON path-level diff**, raising change events with severity. Events can become work orders, and AI drafts a deliverable, chaptered report per batch.

BASELINE VS NOW · DIFF

+ New service
redis:6379

~ Disk 72% → 86%

! Account added:
admin2

= Version unchanged

CHANGE EVENTS · SEVERITY

- Account change · High Ticket
- Disk usage · Notice
- New service · Logged

Dimensions: disk / network /
services / accounts / versions /
topology

INSPECTION REPORT

Inspection Report

2026 · Quarterly batch

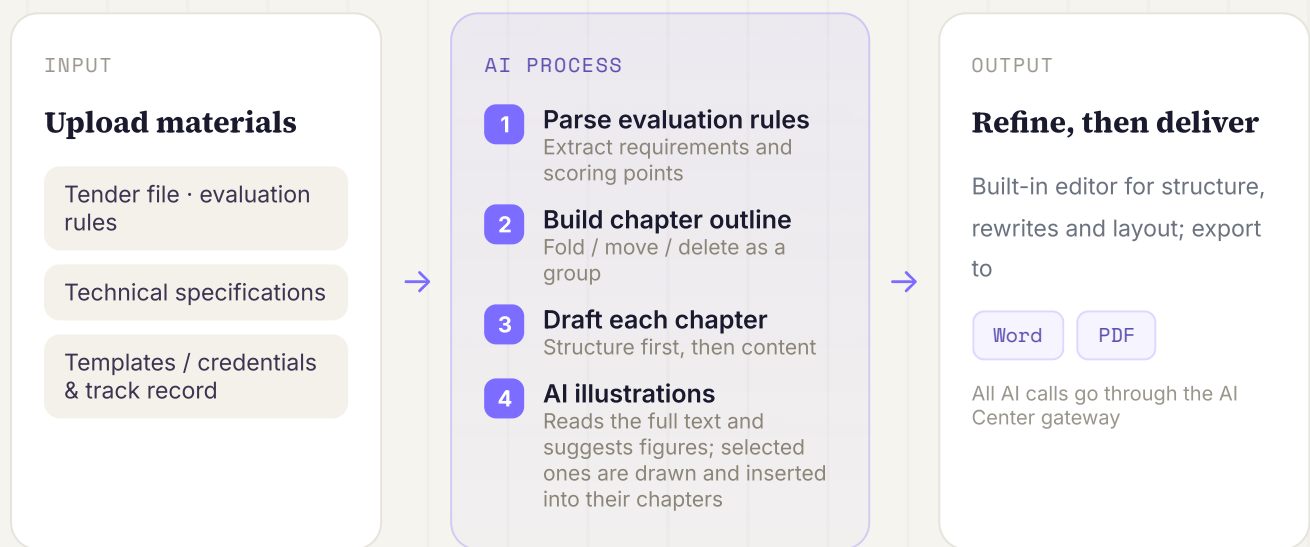
- 01 · Executive summary
- 02 · Device list (parallel drafts)
- 03 · Risks & recommendations

md html docx
pdf

What sets it apart: IIC turns field facts into three usable business assets, **assets / changes / reports**. That is what a typical OA system doesn't do.

Turn the tender file into an **editable** first draft.

AI doesn't invent a proposal on a whim. It reads the tender, extracts the evaluation rules, builds a chapter outline and drafts chapter by chapter; then **people review, edit and export**. Human in the loop.



Tender parsing

Chapter outline

Per-chapter drafting

AI illustrations

One-click export

The whole bid in one place, not scattered across folders.

Materials, tender notice, qualification review and bid response **move stage by stage**, each with a record. Company, personnel and template libraries are reused, so qualifications and materials don't get missed.

1

Materials

Collect bid materials, sorted and recorded.

● Recorded

2

Tender notice

Log requirements and key clauses.

● Recorded

3

Qualification

Check credentials, track record and financials.

● Checking

4

Bid response

Respond item by item, aligned to scoring points.

● To submit

Three libraries · maintain once, reuse everywhere

Company

Personnel

Templates

New bids reuse them quickly, with less re-entry.

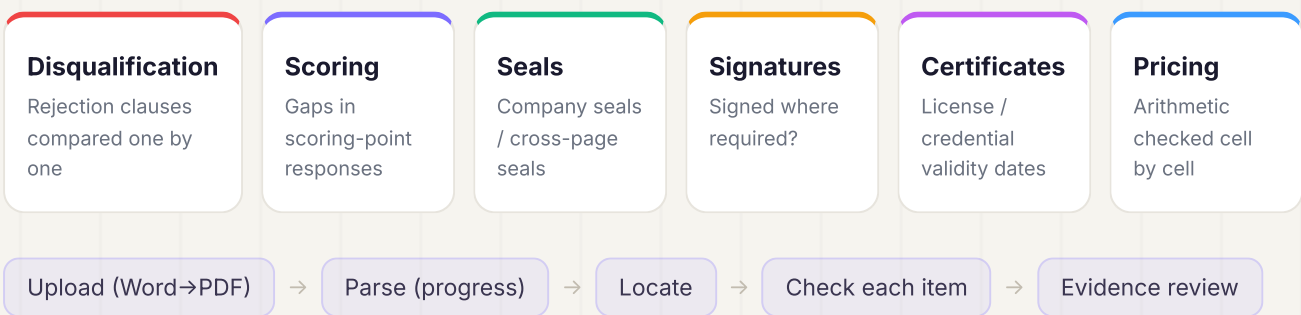
Credential checks

Connects to the Credit China platform for credential checks, **with built-in captcha recognition** to cut manual lookups.



Before the bid goes out, run six checks, item by item.

Upload the tender and bid files (Word is converted to PDF on save). Checks run in six categories: **disqualification risk** · **scoring response** · **seals** · **signatures** · **certificates** · **pricing**. Each one **locates precisely first, then checks item by item**, rather than skimming the whole file. Scanned or image-only bids go page by page through document parsing with OCR fallback, with visible progress.

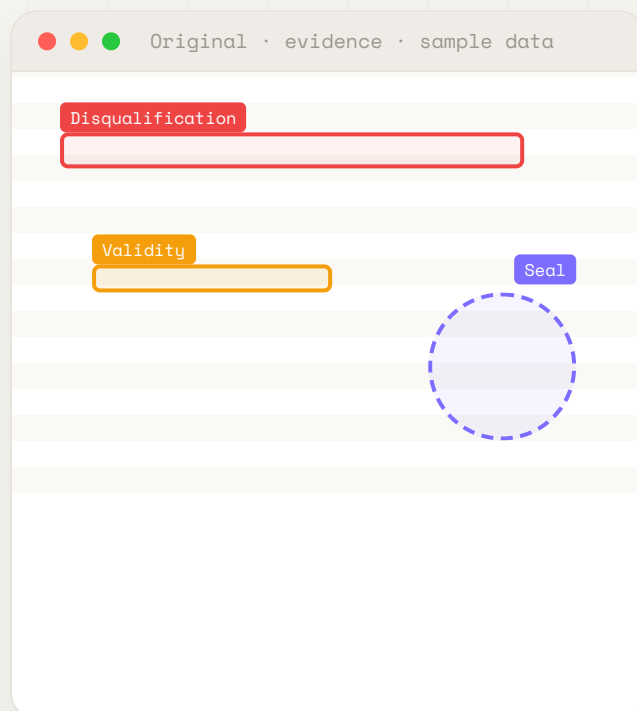


Checklist Sample data · not a real bid

- Bid validity shorter than required (page and clause cited) Disqualification Risk
- Line totals match the bid total (calculation shown) Passed Pricing
- Certificate close to expiry (per source text); human review advised Review Certs
- 3 company seals found, pending match with our own seal Checking Seals

Every finding can be pointed out on the original.

Findings are **pinned by coordinates** to the exact spot in the original, across pages, with a labeled box per sub-item and highlighter marks that never cover the text. Pricing findings show the **full calculation** (line multiplication, subtotals, amount-in-words checks, cell by cell), and certificate validity is **calculated locally** from the source text. Findings can be verified; it's not "because the AI said so".



Seal verification

Offline seal detection boxes company and cross-page seals, **reducing the risk of red text or red logos being mistaken for seals**, and compares them with your own seal from the Business Partners library.

Project baselines & thresholds

Thresholds such as minimum validity, maximum deviation, budget and subject matter are **configurable in System Settings and apply without restart**. When values can't be extracted (e.g. competitive negotiation), enter them manually and lock the baseline.

REVIEW EXPERIENCE

- Multi-page locating
- Labeled box per sub-item
- Duplicate certificates merged
- Highlights never cover text
- Pricing math shown
- Manual resolution marks on alerts

Scope: Bid Document Check finds disqualification risks and material issues and locates evidence for human review. **It does not replace bid evaluation, does not produce an overall automatic score, and does not generate bid documents.**

Price on numbers, not gut feel.

First estimate the price score under the evaluation rules, then produce controlled quotation versions: one chain of decision steps.

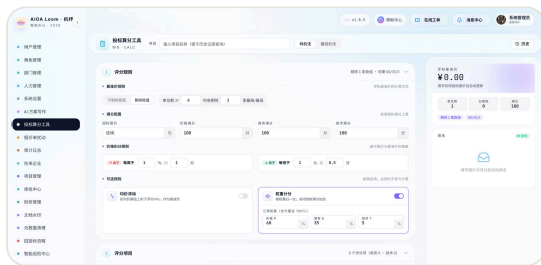
Estimate → Compare → Decide → Export

Bid Scoring Tool

A

Estimate the price score under the evaluation rules and find a competitive price range.

Rules → Prices → Score → Compare



Average-price method

Lowest-price method

Sensitivity

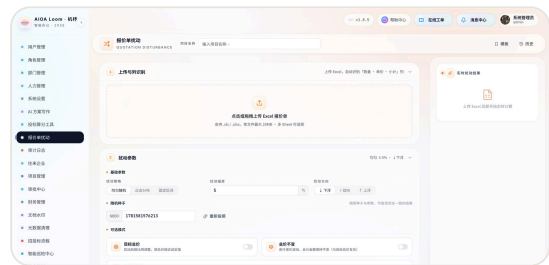
↳ Feeds **Bidding Workflow** · bid response

Multi-version Quotation

B

Controlled price variants from one baseline quotation, for scenario comparison.

Import → Map → Parameters → Export



Column mapping

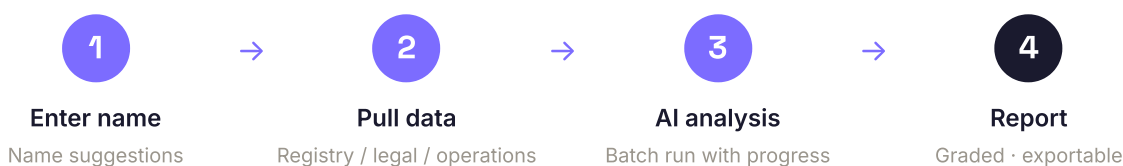
Parameter templates

Batch compare & export

↳ Follows the **Bid Scoring Tool** · after the decision

Before you partner, see who you're dealing with.

Enter a company name. The system pulls authoritative business-registry credit data, adds AI analysis, and produces an **exportable due-diligence report**, putting the risks on the table before you sign.



COVERAGE · 19 DATA INTERFACES

Registration basics

Shareholders & capital

Outbound investments

Change history

Litigation

Enforcement / defaults

Administrative penalties

Abnormal operations

Credentials & awards

Bidding history

Data comes from an authoritative business-registry credit source (Qixinbao) and is written back to the company profile after human confirmation.

RISK ITEMS · GRADED

- H** High: enforcement / serious default / abnormal operations
- M** Medium: litigation / penalties / frequent changes
- L** Low: credentials complete / no adverse records

ANALYSIS OUTPUT

- Risk summary and points to watch
- Evidence listed for each flagged item
- Data snapshot archived for traceability
- Report exported as a file for records

Exported reports serve as **supporting material** for pre-partnership assessment and internal risk control.

The report **supports judgment**: data and analysis are for human review. Whether to partner, and on what terms, is still a human decision.

Business OA

OPERATIONS

Every document has a destination, every figure is kept, every project has a ledger. Daily operations flow along one thread, end to end.

Approval Center <small>FLAGSHIP</small>	30-32
Finance Management	33
Finance · Receivables Ledger	34
Sales & Purchase Contracts	35-36
Project Management <small>FLAGSHIP</small>	37-39
Business Partners	40
Task Center	41

Five request types, one to-do list — no more scattered tracks.

Expense claims, payments, invoicing, leave and overtime flow from different entry points into **one approval workbench** — each person works from one unified to-do list, not five systems.



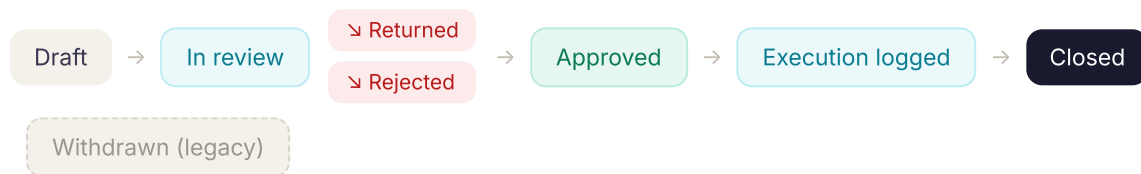
Values are formatted automatically: expenses **¥0.00** · leave **x.x days** · overtime **x.x hours**. "To execute" is visible only to staff with write-off / payment / invoicing execution permissions.



Small sums fast, large sums strict — workflows woven from rules.

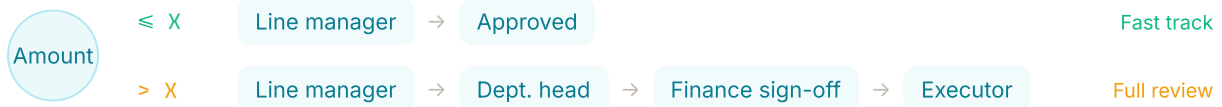
A workflow is not a hard-coded form. **Templates are configurable**, requests are **routed by amount thresholds**, and status is decided by a seven-state `machine_state` as the single source of truth.

SEVEN-STATE MACHINE



status is display-only; optimistic locking prevents duplicate concurrent approvals. Template snapshot: steps are frozen on submission, so editing or deleting a template never affects requests in progress.

AMOUNT-THRESHOLD ROUTING · MULTIPLE TIERS PER MODULE, MATCHED AUTOMATICALLY



Co-signing (one rejection rejects the whole flow)

Route preview before submission

In-progress protection

Hand over / admin reassignment

Approval is only the midpoint — execution and signed archiving finish it.

The point is not "it can approve" — it is that every request has a **complete path** from submission to execution. Separation of duties: applicant ≠ approver ≠ executor.

BEFORE Scattered, chased by hand

Approval results sent by chat

Paper signatures, offline hand-offs

Finance re-enters everything by hand

AFTER Closed loop in the system

- 1 Approval request
- 2 Execution: write-off / payment / invoice
- 3 Print with e-signatures
- 4 Archived for reference

DASHBOARD (PAYMENTS / EXPENSES / INVOICES)

Pending **Approved** **To execute** **Archived**
in_review approved to_execute closed

Executed-amount progress bar (amounts masked) · monthly trend / distribution / top 10

E-SIGNATURE · SIGNED PRINTS

Sign by hand on screen or upload a transparent PNG; signatures appear on the approval timeline and printed forms. Print slots are filled **by step name** or by position, and **only take effect once fully approved**.

Withdraw · recall the last step

Until the next step acts, whoever moved the request forward can recall it: an applicant's recall returns it to draft; an approver's recall returns it for their own re-review.

CC on approval · inform who needs to know

After approval, CC by role or named person (in-app + WeChat). Off by default; duplicates to the applicant and approvers are skipped.

Separation of duties + signed final archiving turns Business OA from an "office system" into a **business management system**.

One ledger for all company funds.

Not just a transaction log, but a funds ledger with **multi-account journals + traceable reversals + period close + reports** — every amount has an entry, a trail and a period.

Total balance

¥ ●●●●

Opening balance

¥ ●●●●

Income this month

+ ●●●●

Spending this month

- ●●●●

ACCOUNTS

Bank account

¥ ●●

Cash account

¥ ●●

Loan account

¥ ●●

Monthly / annual **period close** locks a snapshot of each period.

JOURNAL TIMELINE

06-14

Income · project collection

+ ●●

06-13

Expense · payment record

- ●●

06-12

Transfer · between accounts

↔ ●●

Traceable reversal · errors aren't deleted, they're reversed with a trail

Error - 1,000

→

Reversal + 1,000

→

Full trail kept

Connected to the **Approval Center**: expense write-offs and payment records post automatically to the right account and category.

For every invoice issued: paid or not, and how much is left.

No more matching invoices to receipts by hand — one read-only ledger shows **receivable, received and outstanding** side by side, per invoice or by customer.

RECEIVABLES · PER-INVOICE VIEW

Advanced filtersBy customerExport Excel

Invoice no.	Customer	Invoiced	Received	Status
INV-2026-0142	Northwind Systems Co.	¥	¥	Partly paid
INV-2026-0139	Harbor Construction Group	¥	¥ 0.00	Unpaid
INV-2026-0131	Bluepeak Education Tech	¥	¥	Paid in full

Sample data · amounts and numbers are placeholders; the system calculates them from invoices and receipts

Three states at a glance

Unpaid / partly paid / paid in full — each invoice shows what has come in and what is still due, no manual spreadsheet checks.

Traceable receipts

Open any invoice to see the matched receipt entries — trace from the ledger right down to the exact payment.

Two views

View "per invoice" or "by customer" — expand a customer row for its invoice details: totals first, then specifics.

Saved advanced filters

Expense, payment and invoice reports support combined conditions and amount ranges; save common filters as presets and reapply them in one click or by shortcut.

Three payment states

By customer

Receipt trace-back

Export Excel

Read-only ledger

Sign a contract without digging through Word templates.

Pick a template, fill in key terms and items, and generate a standard e-contract in one click — **sales and purchase kept separate**, logged from draft to signed.

1

Pick a template

Sales / purchase / service

→

2

Fill key terms

Green done · amber open

→

3

Enter item list

Per-line calc · auto totals

→

4

Generate e-copy

Ready to download

BUILT-IN TEMPLATES & ANNEXES

Sales contract

Goods / system integration

Purchase contract

Upstream supply

Service contract

O&M / technical services

Software license

Licensing & permits

Pre-bid lock-in

Bid-stage commitments

COMMON ANNEXES

Goods list

Equipment list

License list

Purchase list

Tech specs

Service scope

Service levels

Payment plan

Deployment env.

On-site staff

Locked quotation

Short and full main-contract versions; tick the annexes you need, adapt the wording and reuse.

Assisted extraction, less typing

Paste quotation text, or upload files or screenshots; the system helps recognize and fill in fields such as **supplier details, amount (with amount in words), delivery, tax rate, invoice, warranty and payment terms**, then jumps to the matching annex.

HIGHLIGHTS · SEE WHAT'S MISSING

Party A: Northwind Systems Co.

Party B: Bluepeak Integration Ltd.

Contract amount: ¥

In words: auto-filled

Delivery location: To fill

Warranty period: To fill

Sample data · green = filled, amber = to fill; switch back to a clean page preview at any time

The system handles **the management side of signing** — templated drafting, item calculations and ledger records. Whether the terms are right, whether legal should review, and how paper copies are signed remain your company's decisions.

Generated ready to send out.

Margins, fonts, spacing, footers and table borders follow formal contract conventions.

Word and PDF are both kept; a company seal image can be overlaid at signing.

A4 PAGE PREVIEW · WYSIWYG

SALES CONTRACT

Party A: Northwind Systems Co.

Party B: Bluepeak Integration Ltd.

Contract no.: XS-2026-0087

No.	Item	Qty	Amount
1	Sample item	1	¥ ••••
2	Sample item	1	¥ ••••
3	Sample item	1	¥ ••••

Party A (seal):

Date: ____ / ____ / ____

Contract no. XS-2026-0087

Page 3 of 5

SAMPLE CO.
E-SEAL
(ILLUSTRATIVE)

Sample data · the seal is an illustrative graphic, not a real seal

No unfilled placeholders in print

Before generating, empty fields become underlined blanks and a list of unfilled fields appears for you to confirm.

Formal contract layout

A4 margins (2.54 cm top/bottom, 3.17 cm left/right), centered bold title, serif body at 1.5 spacing, contract no. and page no. in the footer.

Clean tables

Proper headers; long tables no longer repeat the first data row on every page. Columns fit content, so no squeezed "No." columns or wrapped amounts.

Word + PDF versions

One run produces both, downloadable from the detail page; regenerating clears old files.

Electronic seal overlay

Optionally overlay the seal image at the signature block, on Party A's or B's side per template; seal and signature line stay on the same page.

One-click push to project

Push a signed contract to its project with both files attached; re-push to overwrite corrections.

Word + PDF

E-seal overlay

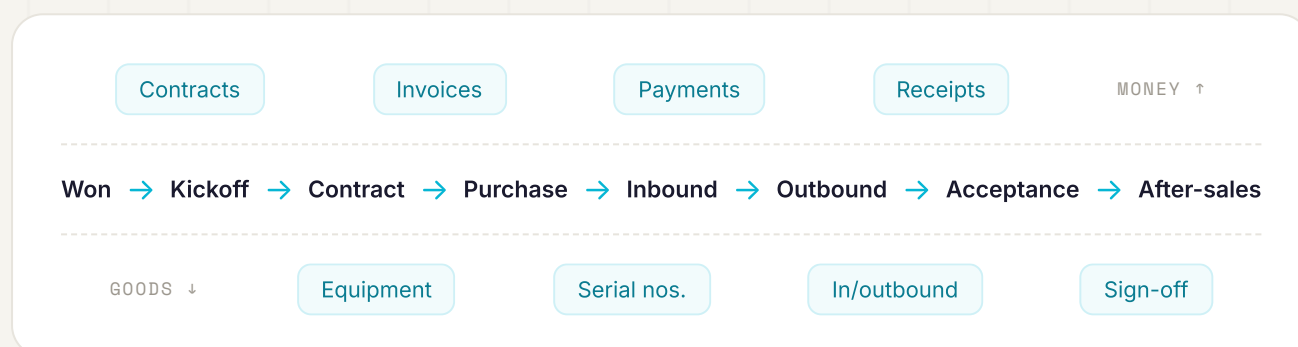
Footer no. & page

Unfilled-field check

Push to project

Winning the bid is just the start — then come contracts, cash and delivery.

The project is the **main thread**: sales and purchase contracts, invoices, payments, inbound/outbound, acceptance and after-sales all hang on it — shifting from a "feature list" to a **managed business object**.



ONE PROJECT LINKS 8 SUB-DOMAINS

Sales contracts Purchase contracts Invoices
Payments Inbound Outbound
Acceptance docs Cost allocation

7 PROJECT STATES

Bidding · Implementation · Awaiting acceptance ·
Awaiting final acceptance · Warranty retention ·
Completed (plus "not won" archive)



A project isn't a folder — it's how business data adds up.

Contracts, invoices, payments and costs roll up by project, all **tax-inclusive** and linked to Finance, Approvals and Business Partners — click a contract amount to drill into its payment requests.

Sales contracts roll up→

Purchase contracts roll up→

Invoices (out/in) feed→

Project
ROLL-UP HUB
One tax-inclusive basis

←approvals Payments / receipts

←linked Customers / suppliers

←roll up Costs

6 FINANCIAL KPI CARDS PER PROJECT (AMOUNTS MASKED)

Total sales
¥

Invoicing progress

Purchase invoices
..

Remaining receivable
¥

Warranty retention
.. %

Acceptance progress

PAYMENTS

Receivable

Payable

Net

Gross profit

Timeline · opening balances · 4-format file preview

Every device you deliver, traced from origin to destination.

Serial numbers per unit, signed-off outbound delivery, acceptance through a state machine, warranty countdowns — exactly the **traceability** that public procurement and delivery audits care about most.

SERIAL TRACKING LINE · ONE ITEM, ONE CODE



Serial numbers are unique and searchable, tracing back to inbound records and delivery status. Sign-off flags: signed / in transit / awaiting signature / exception. Receipt headers are switchable, with batch printing.

ACCEPTANCE DOCS · 6-STATE BOARD

Created
Draft

In progress
Under review

Passed
Complete

Rejected
Resubmit

Board and table views + overdue alerts (red is used only for overdue / exception / rejected).

WARRANTY COUNTDOWN

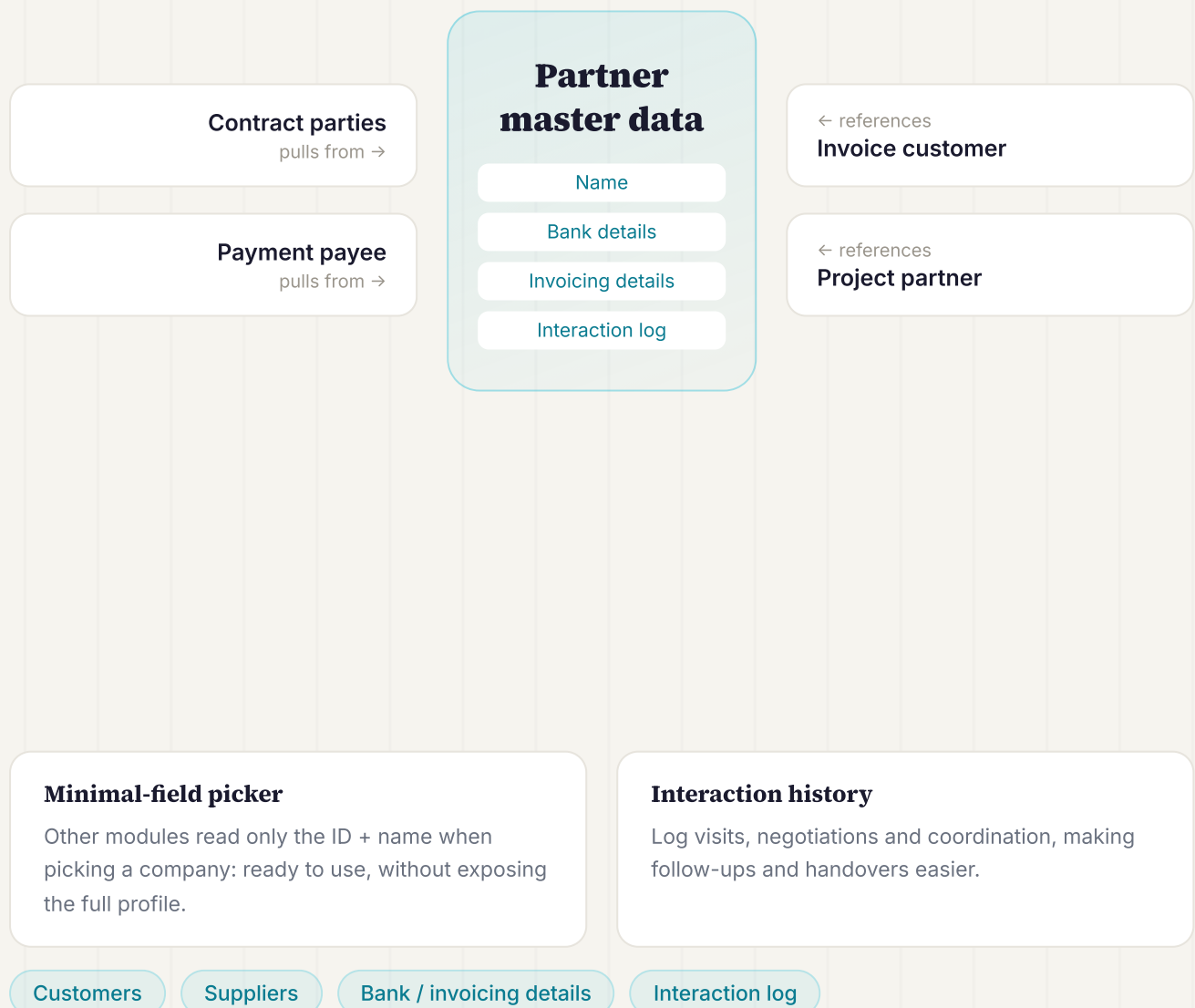
●● months

Compares sales vs. purchase warranty periods, counts down full months remaining and alerts before expiry.

Once the project is a managed business object, every device, invoice and payment **can be traced from origin to destination.**

Customers and suppliers: maintained once.

Company details in contracts, payments, invoices and projects all come from **one master data source**. Update it in one place, and it stays consistent everywhere.

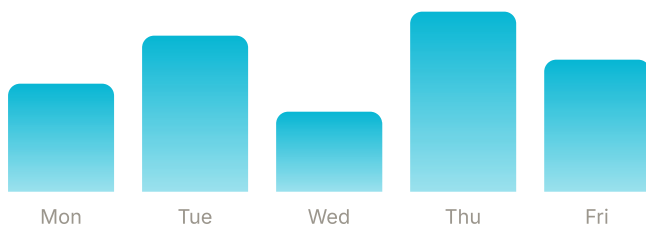


Turn ad-hoc collaboration into reviewable task hours.

Tasks run in a closed loop from posting and claiming to submission, review and statistics, so **ownership, hours and output are all visible**.



WORK HOURS · BY COMPANY / PROJECT



Illustrative distribution · actual figures are calculated by the system

CLAIMING & COLLABORATION

Claim a task, add collaborators to move it forward together, and **each person logs their own hours**, entered manually or tracked live with a **timer**.

Plan schedules in a personal or team-wide **calendar view**.

This is **internal task collaboration**, clearly separate from the flagship Project Management module; it does not replace project delivery management.

Organization & HR

PEOPLE · ROLES · DEVICES

Set the rules, build the structure, assign permissions, manage accounts, then put the workbench in your pocket. With people, permissions and devices in order, approvals have rules to follow.

HR Management	43
Organization & Permissions Foundation · Departments / Roles / Users	44
Mobile Work & Attendance · Mobile Access	45
Mobile App · Workbench in Your Pocket <small>NEW</small>	46
Mobile App · Direct Alerts & Leave-on-Time Reminders <small>NEW</small>	47
WeChat Mini Program · Attendance Self-Service <small>NEW</small>	48

Set the HR rules first, and approvals have rules to follow.

Leave rules, working-hour rules and employment contracts are not static files. They are the **rule source that leave, overtime and approvals draw on.**

HR rules & records

Employee records

Leave policy

Working hours (incl.
monthly cap)

Employment contracts

rule →
use

Leave approval uses leave types and rules from the Leave policy

rule →
use

Overtime approval checks this month's overtime cap in Working hours

linked

Accounts / org employee records linked to accounts and departments

Soft delete keeps history

Deleting an employee record is a soft delete; history is kept, never wiped.

Employment contracts

Draft from templates with AI assistance; signing, termination and voiding each need separate authorization.



Org sets the structure. Roles set permissions. Accounts set identity.

The org decides **who is routed**, permissions decide **what they can do**, and accounts decide **who gets in**. Three interlocking layers form a trustworthy foundation.

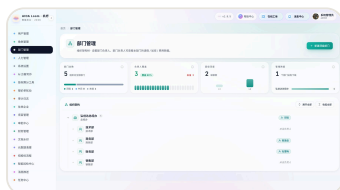
Org → Roles → Accounts

01 Departments

Org structure

The department tree sets membership, heads, and who approvals route to.

Build tree → Set heads →
Feed approvals



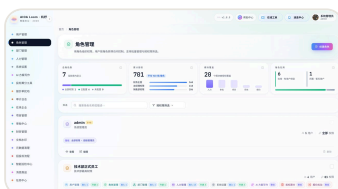
Dept. tree Parent dept.
Heads

02 Roles

Permission matrix

The role matrix sets module access, action permissions and data scope, on least privilege.

Create role → Grant access
→ Set data scope



Permission matrix
Access pass Data scope

03 Users

Identity switch

An account is not a contact list; it is the switch for who gets in, which roles apply, and whether it is active.

Open account → Bind roles
→ Set manager

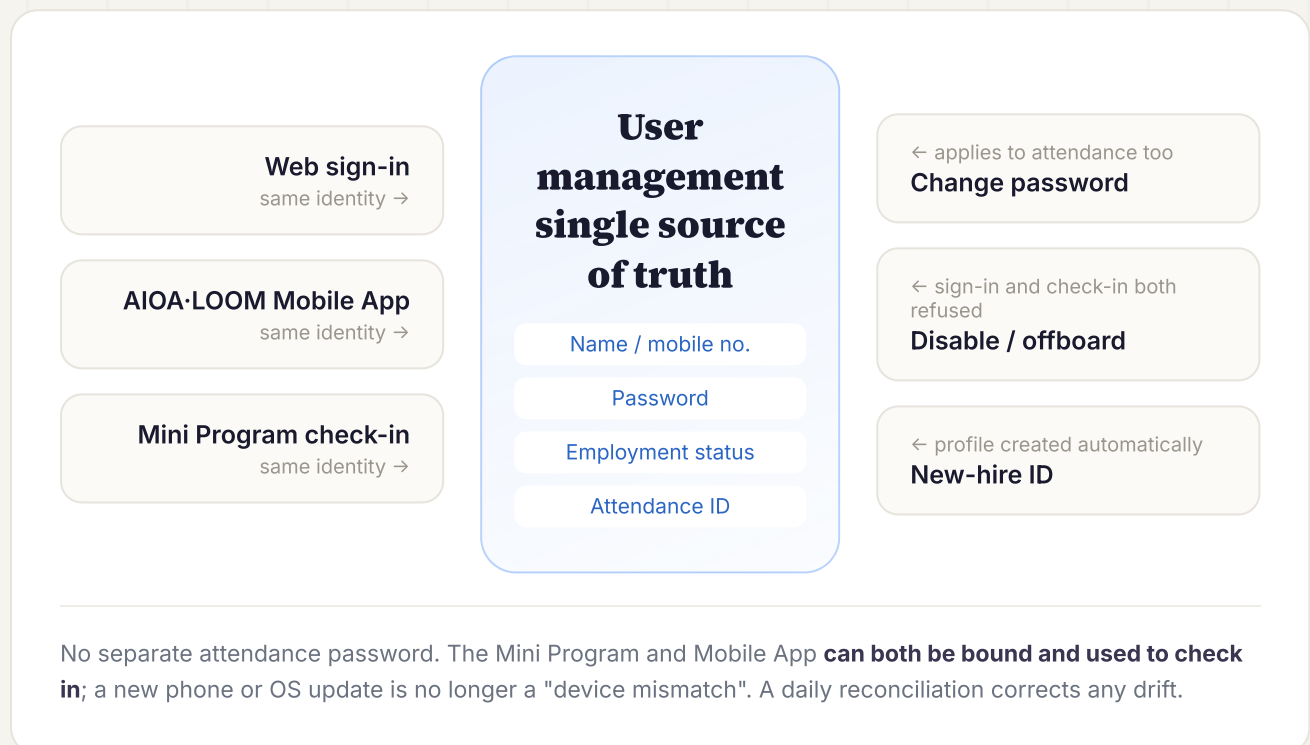


Role binding
Two-factor auth
Direct manager

Departments → roles → accounts: three interlocking layers that form the **trusted permission foundation** of your business system.

One account across desktop, mobile and Mini Program.

Attendance accounts live in unified user management: change once, effective everywhere. Phones connect with a single scan. **One identity, many entry points.**



Self-service access tokens

Employees generate a mobile token in Profile → Integrations and scan it in the app to sign in, with no server address to type. Name tokens by device: one per device.

Per-person · revocable

Each person sees and toggles only their own tokens, which don't take a sign-in seat or log out the web session. Admins can review and revoke all tokens in System Settings.

One rule for missed check-ins

Only leave approved in the Approval Center excuses a missed check-in. A full-day leave covers the day; with a half-day leave you still check in for the half you work.

Automatic check-in sync

Check-in records are pulled in the background on a schedule, not only when a page is opened. Sync switch and look-back months are set in System Integrations.

The QR code contains an access token and **is equivalent to a password**: scan it only yourself and never share a screenshot. If a phone is lost, disable or delete its token at any time.

Laptop closed, company still in your pocket.

AIOA·LOOM on mobile: **native apps for iPhone and Android**. Not a web page in a wrapper, but an entry point rebuilt around how people use phones. Scan once to connect, then use it without signing in again.

Approvals

To-dos and your own submissions on one screen. Details show the full workflow timeline; approve, reject or return on the spot.

Submit

Five request types (expenses, payments, invoices, leave, overtime) can be raised on the phone, with customer / project / contract cascades, handwritten signature, attachments and a confirm step before submitting. Same validation as the web.

AI Assistant

Ask business questions on your phone. It reads data within your permissions and gives conclusions with details. Read-only assistance; it doesn't replace decisions.

Tasks

Task Center to-dos, quick assignment and progress updates.

Attendance

Location-based check-in. Can be bound alongside the WeChat Mini Program; a new phone is no longer flagged as a "device mismatch".

Accounts / mail / documents

Shared Account Register on the go (viewing a password is logged), Company Mailbox with attachment preview, and official documents with handwritten sign-for.

Scan to connect · no address to type

Employees generate an access token in Profile → Integrations and scan it in the app. The QR code **is equivalent to a password**: scan it only yourself, never share it. If a phone is lost, disable that token.

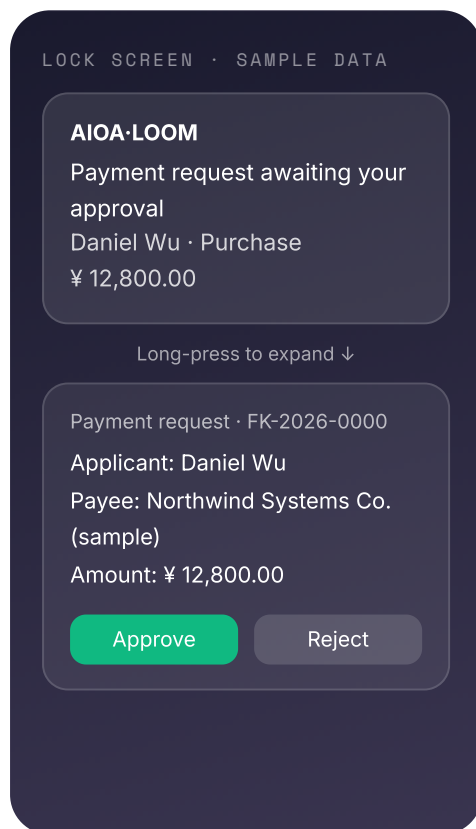
Same permissions as on desktop

What you see and approve on mobile follows your system permissions. Data you can't see in the system stays hidden on the phone, and documents not assigned to you can't be approved there either.

The Android app is a direct-install package that needs no app store or push-service components. The iOS installation method is provided with delivery. The two apps share the same core features; differences are listed under "Capability limits" on the next page.

Work that needs you comes to find you.

Nobody should have to keep refreshing for to-dos. Approvals, official documents and expiry reminders are pushed to the lock screen as they arise; **tap to open the exact document**. Owners can clear approvals on the road.



Pushed as it happens

Approval to-dos, document sign-for requests and expiry reminders are pushed when created, instead of the app polling on a timer.

Quick approval in the notification

Long-press the notification to expand the approval card: see who submitted what and for how much, then approve or reject without opening the app.

People still make the decision

The system only puts the document in front of you. Approving or not is your tap, recorded in the same audit trail as in the system.

Automatic retry on failure

Deliveries that fail due to network issues are retried automatically instead of being silently dropped.

Leave-on-time reminder · off by default

Set your home location and commute mode, and on workday mornings the system estimates when to leave from **live traffic and weather**. Active only once the admin enables it and the employee opts in.

Capability limits (stated plainly)

Lock-screen push and quick approval in notifications are currently **iPhone only**. On Android, open the app to see to-dos; other features match. Android remote push is planned for a later version.

Notifications carry only essentials such as title and amount; opening one still checks your permissions. Names, numbers, amounts and companies shown are **sample data**.

No app to install: check in right inside WeChat.

Attendance is a small daily task, so it lives in the WeChat your staff already have open.

Scan, bind your attendance ID, and go: no phone storage used, no install to explain.

Geofenced check-in

The check-in screen shows the office geofence on a map, so you see at a glance if you are inside. Press and slide to confirm; checking out early prompts again.

Overtime & leave self-service

Swipe across calendar days to request overtime; pick a leave type, with clear half-day prompts. Requests enter the same Approval Center workflow as the web.

Check your own attendance

See today's hours and this week's spread, plus recent check-ins, overtime and leave, so staff spot a missed check-in themselves first.

Prompts follow your rules

Start and end-of-day prompts follow the working hours set in HR Management. Change the rules once; staff see the current policy.

Disable / offboard applies here too

Disabling or offboarding a user also blocks Mini Program sign-in and check-in, with no separate cleanup; reinstating needs no rebinding.

Records sync back automatically

Check-in records sync back in the background on a schedule, not only when a page is opened. Sync switch and look-back months are set in System Integrations.

Three entry points, one identity

Web

Full business scope

Mobile App

Approvals · requests · AI

WeChat Mini Program

Attendance self-service

One account: change passwords, disable or offboard users, or issue attendance IDs in user management, and all three follow. **Mini Program and Mobile App can both be bound and used to check in;** a new phone or OS update is not flagged as a "device mismatch".

The Mini Program is for **attendance self-service** (check-in, overtime, leave, lookup); full functions are on the web and Mobile App. Deployed separately under your organization's own entity, never shared with other customers.

Document Governance & System

GOVERNANCE · COMPLIANCE · OPERATIONS

Official documents on record, email filed, shared accounts traceable, outbound files accountable, and deployment and backup in your own hands: compliance and a solid foundation.

Official Document Center	50
Company Mailbox	51–52
Shared Account Register <small>NEW</small>	53
Outbound File Governance · Watermark / Metadata	54
Audit Log	55
System Settings · AI Center	56
Private Deployment · Launcher <small>NEW</small>	57
Data Backup · Copies You Can Take Away <small>NEW</small>	58
Collaboration & Support · Get in Touch	59

Issue, seal, acknowledge — all on the record.

Internal notices no longer get lost in group chats. Issue documents online, get document numbers assigned by year, apply an electronic seal, and **see at a glance who has signed and who hasn't**.

1

Issue online

Auto document number



2

Sign-off & seal

E-seal · cross-page seal



3

Targeted delivery

Only recipients see it



4

Sign-for record

Signature · ledger

AI DRAFTING · 5 COMMON TYPES

Notice

Request

Report

Letter

Decision

Drafting draws on an **official holiday calendar** and adds the weekday to every date, so a holiday notice won't land on a working day by mistake. AI produces a first draft; **a person reviews it before issue**.

SIGN-FOR LEDGER · EXAMPLE

Recipient	Status	Signature record
Daniel Wu	Signed	Handwritten
Sarah Lin	Signed	Handwritten
Kevin Zhao	Not signed	Reminder sent

Sample data · names and statuses are fictional

Document numbers follow the **year of issue** and restart each January, so numbers never collide.

Sign-off & electronic seal

Pick the issuing entity from Business Partners, apply an electronic seal, and add a cross-page seal so multi-page documents can be checked.

Sign-for ledger

Recipients acknowledge on a handwriting pad. Who read it, when, and where they signed can all be traced and exported.

Reminders & follow-up

Unsigned documents trigger reminder pushes and a badge on the home page, which also gets an Official Documents shortcut.

Separate database & permissions

Official documents live in their own database, apart from business records, and are visible only after an admin grants access in Role Management.

Online issuing

Yearly numbering

E-seal · cross-page

Signed by hand

Reminders

AI drafting

Company email, inside the system. No more switching windows.

Read, write, reply, and forward without leaving the system; preview attachments in place or download them as one bundle. **Email and business live on the same workbench.**

MY MAILBOX

Connected · synced just now

Inbox 12	Harbor Tender Agency Attachment ... Addendum to the open tender for Project X Bids / Tenders
Sent	
Drafts 2	Northwind Finance Attachment ... August statement and invoice delivery Statements / Invoices
Spam	
Deleted	
Bids / Tenders	Bluepeak GmbH ... Angebot für Netzwerkgeräte Foreign language · translate
Statements	PromoHub Marketing ... Limited-time offer Ad · detected

Sample data · mock UI; senders and subjects are fictional

Two things to connect

Your email address plus the **client authorization code** issued by your email provider (not your login password). Done in a few steps.

Write it properly

Bold, italics, lists, and links, plus optional help polishing casual wording into a professional business tone.

Three ways to forward

Body only, with original attachments, or the whole original message. No downloading and re-attaching.

Preview, don't download

Preview PDF, Word, spreadsheets, images, audio/video, and archive contents in place. Download one file or the whole message as a zip.

Full folder set

Beyond Inbox, Sent, Drafts, Deleted, and Spam, create your own folders by business line, such as bids or statements.

Safe reading

Messages render in an isolated view with remote images blocked by default. Click "Show images" when needed, to limit tracking.

This is an email **client**. It does not change your existing email service; staff can keep using webmail and mobile mail apps as before (requires IMAP / SMTP enabled by your provider and a client authorization code).

An inbox that holds only the mail you need to act on.

Mail is auto-classified, ads are flagged, rules file messages away, and foreign-language mail gets a one-click Chinese translation. **Less time sorting email.**

1

Mail arrives

Tiered polling



2

Auto-labeled

Category · ad detection



3

Rule-based filing

Moved when matched



4

What matters

A tidy inbox

TRANSLATION · TOGGLE ORIGINAL / TRANSLATED

Dear Sir or Madam,
Please find attached our quotation for your inquiry...

Chinese translation ↓

The Chinese translation appears here; switch back to the original at any time.

Sample data · translations are cached, so reopening a message shows them right away

Classification & spam detection

Each message is labeled by business category; ads, sales pitches, and phishing are flagged.

Rule-based filing

Assign a folder to each category; matching mail moves there, leaving the inbox for what needs action.

One-click unsubscribe

Unsubscribe from marketing mail directly, without hunting for the fine-print link.

Keyboard shortcuts

Shortcuts to move, open, mark read, star, delete, compose, and reply; press ? for the full list. Right-click a row to translate, mark, move, or delete.

Search & filters

Filter by sender, recipient, subject, attachments, unread, or starred, or search the body. Multi-select to mark read, star, flag spam, move, or delete.

Visible sync · isolated faults

A status bar shows connection and last sync time. If one mailbox has trouble, only that account backs off briefly and retries; others keep working.

Local drafts

Unfinished mail is saved to Drafts to resume anytime. Failed sends are retried automatically, with the failure reason shown.

Platform accounts, CAs, USB keys: too important for a spreadsheet.

Most companies keep bid-platform logins, CA certificates, and USB keys in one shared spreadsheet. It stores them, but it can't do three things: **remind you before expiry, record who viewed a password, or show which platforms still hold old company details after a change.**

EXPIRY

Expiry reminders

Expiry dates for certificates, USB keys, and memberships live in the system, with a reminder every morning for what's due, so no one has to remember.

AUDIT

Password views logged

Plaintext passwords are hidden by default. Every view or copy records who, when, and on which device, for later review.

SYNC

Change once, track all

Address, main bank account, and similar details come from one Bidding Entity Profile. Change it, and platforms still holding the old value join a "to update" list.

A register built for real-world complexity

Platform profile

One record per platform: name, URL, category, partnership tier, and notes, instead of cramming platform and entity into one cell.

Accounts

Several logins per platform, each tagged with its bidding entity, purpose, and status, so you can see who uses it and whether it still works.

Credentials

CA certificates, USB keys, and key media are registered separately, with owner, custodian, and expiry date.

Bidding entity profile

Company name, registration number, business address, main bank account: the baseline every platform record is checked against.

Credentials are **stored encrypted**, and the decryption key is kept apart from the database. An admin must grant access in Role Management before the module is visible. Back up the system keys together with your data, or the encrypted records cannot be opened (see Data Backup).

Before a file goes out: mark its source, strip the private.

Watermarks handle **source identification**; metadata cleanup prevents **hidden-information leaks**. One pass before anything leaves the company.

One pass before sending

→ Mark the source

+

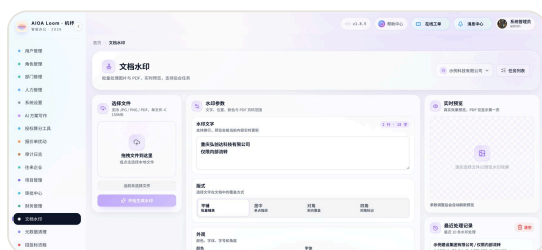
Strip private data

Document Watermark Mark source

Batch-apply text or logo watermarks to PDF / Word files to label their source consistently.

Select files → Configure → Batch apply

→ Download



Text / Logo

Reusable presets

Clear error reports

↳ Consistent source marking for sensitive outbound materials (projects / bids)

Metadata Cleanup Strip private

Remove metadata that is invisible but present: author, organization, revision history, and creating tool.

BEFORE

Author ... · Org ... ·
Revisions

→

AFTER

Clean copy · no
hidden data

Side-by-side preview

Batch cleanup

Copies only

↳ The last governance step before sending · removal is irreversible

A black box for every action.

Sign-ins, creates, edits and deletes, permission changes, watermarking and configuration changes can all be searched, filtered and archived for download. The log is read-only and record-only, **entries cannot be altered**.

All records

●●,●●●

High-risk actions

●●

Action mix

AUDIT TIMELINE · ONE-LINE PLAIN-LANGUAGE SUMMARY + COLOR BY ACTION TYPE

11:42

● System Admin approved a payment request

Update

11:20

● Created user "Sample Account" with the Project Manager role

Create

10:58

● Watermarked 5 files with "Internal Use Only" (diagonal)

Watermark

10:30

● **Changed permissions of the "Finance" role · High risk**

Review first

user.role.update {old:[],new:[..]}

→

"Changed permissions of the 'Finance' role"

Filter by action category and time range, and **archive for download** for compliance retention. High-risk actions (deletions, permission changes, turning off two-factor authentication) are flagged to **review first**.

AI and global settings, in one controlled console.

Branding, license, AI gateway, model parameters and sensitive credentials are configured in one place. This is **AI under your control**, not config files scattered across servers.

SETTINGS GROUPS · CONSOLE

Branding

Login page / logo / short system name

License

License status / machine code / licensed modules

AI Center

Gateway / embedding & rerank models / Xiao'ao settings / proposal-writing settings

Integrations

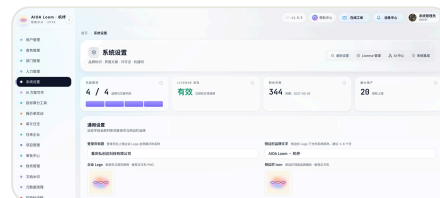
Credentials for external connections

Save → **applies system-wide**

Most settings take effect on save, with no config-file edits or restarts.

Sensitive credential protection

- Sensitive fields filtered from public APIs
- Shown only through admin-only APIs
- Displayed in masked password fields



Private deployment shouldn't mean "call someone whenever it breaks."

The system runs on your own machines, so your own staff need to handle everyday start/stop, upgrades and health checks. The **AIOA·LOOM Launcher** turns all of this into buttons: no command line, no ops expertise required.

01 One-click start/stop · Supervision

Backend, web service and plug-in relay are supervised and restarted automatically if they exit unexpectedly. After start-up, repeated health checks run before the status shows "Running", rather than treating "the process exists" as healthy.

02 One-click upgrade · Rollback on failure

The Launcher notifies you when a new version is released. The upgrade runs automatically: download → verify integrity and developer signature → back up the current version → stop and replace → health check. If the check fails, it returns to the pre-upgrade state. Installers are kept locally for offline reinstall.

03 Permission check · Make "stuck" visible

If macOS permissions are incomplete, tasks such as generating contract files or exporting PDFs can hang without an error. The Launcher **runs a real conversion** on a built-in sample and tells you within moments whether this machine can produce documents, which permission is missing and where to grant it.

04 Status at a glance

Version, service uptime, port usage, disk space and database size on one screen. If something goes wrong, send us a screenshot: much faster than describing symptoms back and forth.

05 The Launcher updates itself, too

Launcher updates are also done in the interface; if replacing the package fails, the previous version is restored automatically. Automatic updates are optional.

Developer-signed + Apple-notarized

Signed with the developer certificate of Chongqing HongChuangDa Technology Co., Ltd. and notarized by Apple, so first installs are no longer blocked as "unverified developer".

A way back before every upgrade

Upgrades first tag the data-schema version and keep a snapshot. If an older version doesn't match current data, the system refuses to start rather than run on it.

Your data is yours, including a copy you can take away.

Private deployment means more than "the data sits on our machines": you should be able to make a **complete, verifiable copy** at any time. Backup is built into the Launcher: tick a few options, pick a destination, and it starts. No scripts, no cron jobs.

Four kinds of content, select as needed

Business databases

Each business database is copied consistently and self-checked for readability on the spot.

Attachments

Uploaded contracts, invoices, bid documents, official documents and other stored files are mirrored.

System configuration

Runtime parameters and deployment settings, ready to follow when rebuilding on a new machine.

System keys

Keys that decrypt encrypted data such as registers and mailboxes. **Leave them out, and the backup is "complete but can't be opened".**

You choose the destination

An external drive, a NAS share or another local disk. If the media is unplugged, the system detects it and stops, instead of silently filling up the system disk.

Retention by count

Set the frequency and number of copies, e.g. hourly with 720 copies kept, about 30 days. Counting copies rather than days means a gap in backups won't age out every copy at once.

A manifest with every copy

Each backup includes a manifest: system version, data-schema version, per-database checksums and self-check results, and an attachment index. You can verify it instead of guessing whether it's complete.

Restore, assisted by us

Restoring requires stopping the service and matching the data-schema version, and cannot be undone, so **the product has no one-click restore button**. Hand us the backup folder and we restore it, checked against the manifest.

Backups run automatically on schedule with no one watching; run history and failure reasons are visible in the Launcher. We recommend keeping at least one copy **off this machine** (external drive or NAS).

After go-live, issues get closed in the system, too.

Alerts that open the right document, Xiao'Ao answering from the knowledge base, tickets routed to vendor support: a **closed support loop** continues after go-live.

Message Center

Approval to-dos, document outcomes and task updates in one inbox; one tap **opens the related document**.

Help Center · Xiao'Ao

Searchable module docs; Xiao'Ao **answers from the knowledge base** and cites the source section.

Online Tickets

Submit issues with screenshots and follow them from intake to closure, **with every step on record**.

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Version v1.8.41 · Demos and private deployment consultations welcome