

# BigLedger Handbook

v1.3



This is the BigLedger Handbook that provides all public use cases of the Akaun Platform. To view this in other formats, click on the following:

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# Chapter 1. BigLedger Overview

## 1.1. BigLedger BigPicture

### 1.1.1. Introduction

This documentation consist of two parts:

- BigLedger [Handbook](#)  
For public users wanting to learn about BigLedger Akaun Platform. Click [here](#) to access.
- BigLedger [Blueprint](#)  
For BigLedger employees only. Click [here](#) to access.

#### 1.1.1.1. Getting Started

Before you rush into learning how to use the Akaun Platform, we strongly recommend that you refer to the following chapters to grasp the high level overview of what the Akaun Platform can do for you as follows:

- [Section 3.1.1, “Industry Guide - Introduction”](#)  
This guide provide you an in-depth case study of the problems faced by consumer electronics, car repair workshops, logistics, manufacturing, healthcare and retail businesses and how they might be able to solve their problems using the Akaun Platform.
- Modules Guide
- User Guide
- Technical Guide

#### 1.1.1.2. Speak To Us

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#### 1.1.1.3. Downloads

If you would like to download the **BigLedger Handbook** for offline reading or prefer to read the BigLedger Handbook using your favourite Epub reader, you may download from the links below.

- [PDF Format](#)
- [Epub Format](#)
- [Single File HTML](#)

## 1.1.2. Background

Founded in 2017, the company name "BigLedger" carry the meaning of "**Big Data**" + "**Financial Ledger**", it has grown from an idea of combining structured and unstructured data with the financial data to an operational data lake platform that could be used by big enterprises as well as small and medium businesses.

BigLedger started with the intention to solve one of the biggest problem faced by businesses, which is to integrate various systems, namely:

- Accounting Software
- Customer Relationship Management System
- Point of Sales
- Marketplace Integration
- Human Resource System
- Issue Tracker
- Project Management
- Digital Marketing
- Sales Force Automation
- Procurement System
- E-Commerce Applications
- Mobile Apps
- Membership Program (Customer Loyalty Systems)
- Warehouse Management
- Inventory Management Software
- Logistics and Delivery
- Contact Center System
- Taxation
- Customer Helpdesk
- .... and many more

We are thankful to our customers that embark the BigLedger journey with us as follows:



Born in the cloud, the BigLedger **operational data lake** connect all parts of a business into an intelligent suite on a fully digital platform and is capable of replacing process-driven, legacy platforms. The "Akaun Platform" is also officially recognized as the winner of APICTA (Asia Pacific ICT Award) in the Business Services Category as follows:



# Chapter 2. User Guide

This repository contains all the source code for publishing the Akaun Platform Public Documentation.

## 2.1. Applet Users

### 2.1.1. Introduction

The very first thing that every akaun-platform users would need to have, is to sign up for and AkaunID. You can do so by visiting <https://akaun.com/>

#### 2.1.1.1. Your AkaunID

It is important for you to understand that with a single AkaunID, it is possible for you to have multiple Sign-In methods. You could be using an email with password, a phone number with the same password, you could also be adding access keys to your AkaunID for integration purposes.

#### 2.1.1.2. The Production, Staging and Development Environment

The very first thing to know is to understand the usage of each of the following environments.

= | Environment | URL | Custom Domain | Description

| Production | <https://akaun.com> | <https://<something>.akaun.net> | This is the live environment, used by real businesses in their day to day operations.

| Staging | <https://akaun.cloud> | <https://<something>.akaun.app> | This environment is usually used for testing by the customers and project managers. New features are tested by the end users here before it gets deployed to the production environment.

| Development | <https://akaun.dev> | <https://<something>.akaun.xyz> | This environment is usually used by the software developers to do their experiments.

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If you have registered an AkaunID to login to the Production environment, that doesn't mean you have the same AkaunID registered in the Staging Environment and vice versa.

#### 2.1.1.3. Understanding Root vs Tenant

Within a single environment (Production vs Staging vs Development) there's one and only one root database, and there could be MANY tenant databases. Each user could be joining MULTIPLE tenants and they could have different "RANK" when joining each tenant, for example, OWNER, ADMIN, MEMBER, GUEST, VISTOR.

=

| Rank of a user in a Tenant | Description

| OWNER | The OWNER of a tenant is able to add any applets to an "applet catalog" if the person is also the owner/admin of the "applet catalog". The OWNER is able to add, remove or promote another user in the tenant to be the OWNER of the tenant. This RANK is usually granted to the business owners or MIS Manager of a company.

| ADMIN | The ADMIN of a tenant can do almost everything that the OWNER can do, except adding , removing or promoting another user in the tenant to become the OWNER. This role is usually granted to the MIS Executive or managers in a company.

| MEMBER | The MEMBER Rank does not entitle a user to administer the Tenants , Applet Catalogs, they can however, become the OWNER/ADMIN or MEMBER of an Applet after they installed the specific applet. It is important to understand that the "OWNER/ADMIN of the Tenant" is NOT the same as the "OWNER/ADMIN" of the "Applet"

| =

#### **2.1.1.4. The Applet Store**

By default, a newly signed up user would see the "Applet Store" (applet) upon successful login. From the **Applet Store** , a user would be able to install applets in the public or private applet-catalogs.

It is very important for users to take note that they are able to see "RANK" tag and "TENANT" tag before installing the applet, so that they are installing the right applet for themselves.

If you are NOT the OWNER / ADMIN of a tenant, you can see a list of applet-catalogs and multiple applets in each of the applet-catalog and choose to install any of the applets accordingly.

## 2.2. Project Implementors

### 2.2.1. Introduction

Understanding of the Akaun Platform is a prerequisite for successful implementation of any projects using the BigLedger platform.

In this section, we are going to list down what the Platform System Administrators need to do, in order for a company to start using the Akaun-Platform.

#### 2.2.1.1. Subscription setup in Akaun Platform

The Platform System Administrator should be using the "Platform SysAdmin Applet" to create a subscription, and then add the OWNER / ADMIN of the tenants (usually the MIS Manager or business owners) as a MEMBER of this subscription. By adding a user to this subscription, he/she will be able to create new Applet Catalogs using the "Tenant Admin Applet".

*(At the time of writing as per 2022-05-19, the new "Platform SysAdmin Applet" and "Tenant Admin Applet" are being redeveloped, hence, we will use the work around method to achieve this for the time being.)*

#### 2.2.1.2. Tenant setup in Akaun Platform

Only the Akaun Platform system administrators (Wavelet and BigLedger employees) are able power up the tenant for you. The Platform System administrators need to ensure that when creating the Tenant, the correct subscription account is chosen.

Please email [jira-mis@wavelet.net](mailto:jira-mis@wavelet.net) to request for the tenant to be created.

We do not plan to allow non-System Administrators to create new tenants at the moment, because our Billing engine and FPX recurring payment authorization is not ready yet. Once these are ready, we may consider allowing businesses that have authorized us to bill and charge be able to create tenants in the "Tenant Admin Applet" \_)

#### 2.2.1.3. Applet-Catalogs

Think of applet-catalog as a collection of applets, tagged with RANK and TENANT. When the OWNER/ADMIN of the applet-catalogs can add applets to it, and they have to specify the "rank" and "tenant". This also mean, within the same applet-catalog, it is possible to include the same applet that links to different tenants.

The ADMIN/OWNER of the applet-catalog also need to add users to the applet-catalogs, and they can add them as OWNER/ADMIN/MEMBER to the applet-catalogs. Only OWNER/ADMIN of the catalogs can manage the applet-catalog (adding / removing applets and users from the applet-catalogs).

All OWNER/ADMIN/MEMBER of an applet-catalog can see the applets in this catalog and install these applets when they use the "Applet Store ⇒ Private"

When the users install applets from the "Applet Store" the RANK/TENANT tags will be applied to grant the users the respective permissions when they open the respective applet. Only the

OWNER/ADMIN of the applets will be able to see and click on the "Settings" on the left handside menu of the applets to perform some further configuration for the applet. (This is not the same as the rank of the users in the applet-catalog).

#### 2.2.1.4. Configuration of Core Modules

The Core Module consist of the following the main applets that are depended by all other applets. For example, in order to issue a sales invoice, we need to ensure that the Company and Branches are setup and configured, the products and services are added into the Item Maintenance applet, the employees of the company is setup so that the users can select the salesman when issuing the sales invoice.

The applets in [Core Module](#) should be installed, configured in proper sequence, before you proceed to install the other applets.

See [Section 4.2, “Core Module”](#) for more details.

## **2.3. Tenant Owners**

### **2.3.1. Tenant Owners**

#### **2.3.1.1. What is a Tenant ?**

#### **2.3.1.2. Managing Users**

- You can invite / add a user to a tenant or remove their access to a tenant but you cannot reset their password
- Identity management is handled at the root or platform level

#### **2.3.1.3. Fees and Charges**

#### **2.3.1.4. Access and Permissions**

#### **2.3.1.5. System Performance**

#### **2.3.1.6. API**

#### **2.3.1.7. Subscriptions , Applet-Catalogs , Applets**

#### **2.3.1.8. Audit Trail**

## 2.4. Applet Developers

### 2.4.1. Introduction

Welcome to BigLedger Applet Developer's guide. This guide provide you the steps and information on the full software development lifecycle of developing an applet as well as launching, promoting and selling your applet in **Akaun Store**.

**Akaun Applets** provide businesses the ability to consume software in a modular way, cost effectively, without the pains of integrations.

## **2.5. Resellers**

### **2.5.1. Introduction**

Guide for resellers

#### **2.5.1.1. Section 1**

#### **2.5.1.2. Section 2**

## 2.6. System Integrators

### 2.6.1. Introduction

Welcome to integrate with **Akaun Platform!** The possibilities are endless. This overview will cover everything you need to know to integrate with the BigLedger Data Lake

There are a few ways you could integrate with the Akaun Platform:

- REST-api  
Ready to use, anytime. You can use any programming languages, framework and tools to call the Akaun RESTful API.
- Webhook
- Python SDK  
This will only be available from 2024.

#### 2.6.1.1. Use cases

We work with various system integrators to integrate with Akaun Platform in the scenarios as follow:

- E-Commerce  
E-commerce system providers would usually integrate to synchronize the following:
  - Product Information  
E-Commerce would pull the latest item code from Akaun Platform because typically, the latest information of the products (e.g. pricing, promotions etc) is maintained in the data lake.
  - Sales Order Transactions  
After an order is confirmed in the shopping cart, this need to be pushed into the data lake for fulfillment and delivery
  - Customer Data  
New users (email addresses) created in the shopping cart need to be sync back to the data lake
  - Stock Availability  
In order to prevent oversell situation where orders from the customers could not be delivered, resulting in bad customer experience, the e-commerce software will have to pull the stock availability information from the Akaun Platform.
- Point of Sales
  - Product Information  
Similar to e-commerce, this information should flow from the Data Lake to the Point of Sales.
  - Sales - Cash bills / Receipts  
Generally, Point of Sales systems would send the Sales Receipts (Cash bills) transactional information to the Akaun platform.

- Customer Data

This information is usually consolidated and processed in the data lake platform

- Accounting System

- Sales Invoices, Sales Return, Credit Notes, Receipt Vouchers

As Akaun Platform is usually used for consolidating various operational data , including transactions with the customers, it is possible that these sales transactions are exported to certain accounting software for financial reporting.

- Purchase Invoices, Purchase Return, Credit Notes, Payment Vouchers

Likewise, transactions with the suppliers could also be exported to third party accounting system for financial reporting.

- Journal Transactions

As Akaun Platform is also capable of generating Journal Transactions, it is possible that instead of exporting transactional documents, only the journals are exported into third party accounting systems accordingly.

- Membership Program

- Member Records

The data lake contains all member records, and it is also associated with various contact channels (Facebook, Whatsapp, Telegram, email, mobile phone etc). Third party Loyalty program could be pulling or pushing data into the Akaun Platform (both directions).

- Point Transaction Lines

If membership point calculations are done in the membership program, this information could be synced from the Membership program into the Akaun Platform, by doing so, businesses would be able to utilize this data in their e-commerce websites, mobile apps etc.

- Membership Point Control Account This table is used to store a list of membership points balance based on expiry dates. Internally, Akaun Platform could auto calculate and update this information and make it available for any third party loyalty program.

- Latest Membership Point Balance This table only store the latest membership point balance that is also calculated whenever new membership point transaction lines are inserted. This information could be used by Point of Sales or E-Commerce website to pull the information on a near real time basis.

- Warehouse Management

- Purchase Orders

Usually, the purchase orders are issued from the Akaun Platform to the suppliers, and these Purchase Orders need to be synced to the WMS so that when the suppliers deliver the goods, the users will use the Warehouse Management System to enter the records of the goods received from the supplier, and subsequently compare and check this against the Purchase Order from within the WMS software itself. So, the usual direction of syncing for Purchase Order is from the Akaun Platform to the WMS system.

- Purchase - Goods Received Notes

As Goods Received Notes are usually created using the WMS system, this information is synced back to the Akaun Platform as inventory stock balance calculations are done in the Akaun Platform. The Goods Received Note synced to the Akaun Platform would also be used to generate the Internal Purchase Invoice document, for Account Payable calculations, self

billing, GST / VAT (taxation) purposes.

- Sales Orders

The Akaun Platform consolidates the sales orders from E-Commerce, **Conversational commerce**, outlets (branches), marketplaces (e.g. Lazada and Shopee etc), these orders could be sent to the Warehouse Management System for picking , packing and delivery purposes.

- Human Resource

- Sales related data

In order to calculate the sales commission, third party payroll or human resource software could extract the sales reports from the Akaun Platform for calculations and processing of payroll and automate the processes accordingly.

- Identity and Access Control

Whenever there's a new employee joining or leaving, with the auto-import / export function, we would be able to ensure identity and access management could be automated.

- Mobile Apps

- Statement of Account

Third party mobile apps developer could potentially be pulling the statement of account of specific customer and display it in the mobile app to provide a great user experience.

- Transaction history The transaction history would include all business documents, for example, Sales Order, Sales Invoice, Sales Return, Credit Note, Purchase Order, Purchase Invoice, Payment Voucher, Credit Note etc.

- Warranty Information Given a product serial number, it is possible to pull information from the Akaun Platform on the warranty expiry date and other information that may be useful for consumers.

- Sales Quotations Certain quotations would need to be approved by the customers, it is possible for the mobile apps developer to obtain this information for the customers to "approve" the Sales Quotation in order for the Sales Order or Job Order to be carried out.

- Sales Orders It is likely that the mobile app might want to pull information about the sales order history, and also be able to create a sales order directly into the Akaun Platform.

- Product Information If the mobile app would like to display a list of products and services (including images), the mobile apps would need to pull from Akaun Platform the product pricing, images, item code, item name and other information that is necessary.

### 2.6.1.2. Benefits

## 2.6.2. Getting Started

This guide is meant for system integrators who are NOT developing Akaun Applets, third party system integrators refer to developers intending to consume the Akaun API.

### 2.6.2.1. Developer Account Registration and Configuration

Akaun provides various environment for developers to test, stage and deploy into production.

	Sandbox	Staging	Production: Akaun.com	Production: Akaun.in	Production: Akaun.cn
Custom Hostnames	*.akaun.xyz	*.akaun.app	*.akaun.net	*.akauncom.in	*.akaun.com.cn
Region	Singapore	Singapore	Singapore	India	China
status	Live	Live	Live	FUTURE	FUTURE
Description	This is the developer sandbox to experiments , test and develop.	This is for UAT, Demo, Final testing before deployment to the production environment.	This is the global live environment.	This is the isolated environment for India market.	This is the isolated environment for China market.
Shell Website	<a href="https://akaun.dev">https://akaun.dev</a>	<a href="https://akaun.cloud">https://akaun.cloud</a>	<a href="https://akaun.com">https://akaun.com</a>	<a href="https://akaun.in">https://akaun.in</a>	<a href="https://akaun.cn">https://akaun.cn</a>
API	api.akaun.dev	api.akaun.cloud	api.akaun.com		

## Registration of developer account

As a new developer, the developer should register an account in Production environment via the website: <https://akaun.com>. These are the brief registration steps:

- Register an account using either email or phone number
- Activate account using 6 digits number

## Registration of user account in production environment

A new user should register an account at: <https://akaun.com>:

- Register an account using either email or phone number
- Activate account using 6 digits number
- Login and install desired applets

## Vendor and Developer Registration

### Registration of user account in development environment

Similar to product environment, a new user register a development account at: <https://akaun.dev>

- Register an account using the same email or phone at <https://akaun.com>
- Activate account using 6 digits number
- Login and install desired applets

## Obtaining access id and access key

These access key is required as credential to call etl endpoint. Please go to <https://akaun.prod> (depending on the environment) and follow these step:

The image consists of three vertically stacked screenshots of the Akaun platform interface.

- Screenshot 1:** Shows the main navigation bar with the URL <https://akaun.com/#/bigledger/akaun-platform/container/launchpad-panel>. A red box highlights the URL bar. On the right, there is a user profile icon and a "Profile" link, both enclosed in a red box.
- Screenshot 2:** Shows the "Personal Information" page with the URL <https://akaun.dev/#/akaun-user-profile-applet/my-profile>. A red box highlights the "Access Key/ID" tab. Below it, a red box highlights the "Add" button (a blue circle with a white plus sign).
- Screenshot 3:** A modal window titled "Add Access Key". It has fields for "Access Key Label" (with a note "For labelling purpose(can be anything)"), "Access Key Type" (with a note "Type is optional"), and "Expiration Date" (with a note "Expiration date is optional"). At the bottom is a large "Add" button.

## System Integration Applet

### 2.6.2.2. Understanding Akaun Applet Platform

#### Akaun Platform System Diagram

#### Understanding various endpoint based permission schemes

#### Using the API Reference

### 2.6.2.3. API Testing

#### Software Tools to test the APIs

Api Developers may test the api in stoplight documentation: <https://bigledger.stoplight.io/docs/blg-akaun-api-docs-public>

Environment	Website URL	Api URL
Sandbox (development)	<a href="https://akaun.dev">https://akaun.dev</a>	<a href="https://api.akaun.dev/endpoint_url">https://api.akaun.dev/endpoint_url</a>
Staging environment	<a href="https://akaun.cloud">https://akaun.cloud</a>	<a href="https://api.akaun.cloud/endpoint_url">https://api.akaun.cloud/endpoint_url</a>
Production environment	<a href="https://akaun.com">https://akaun.com</a>	<a href="https://api.akaun.com/endpoint_url">https://api.akaun.com/endpoint_url</a>

**Notice:** AuthToken is refreshed every month, developers should get new authToken once every month(for testing api using authtoken\*\*not applicable for etl endpoint).

Below is the method to get authToken using sandbox (development) environment as an example

- Login into <https://akaun.dev>
- Right click on an empty space and choose “Inspect”
- Find “LocalStorage” under “Storage” tag

The screenshot shows the Chrome DevTools Storage panel. The left sidebar lists storage types: Cache Storage, Cookies, Indexed DB, Local Storage, and Session Storage. The Local Storage section for the domain <https://akaun.dev> is selected and highlighted with a green box. The right panel displays the contents of the Local Storage, with a table showing Key and Value pairs. The 'Storage' tab is also highlighted with a green box. The table data includes:

Key	Value
authToken	[REDACTED]
email	[REDACTED]
guid	[REDACTED]

#### Using the “System Integration Applet”

#### Example of frequently used APIs

#### **a. Product API**

#### **b. Customer API**

#### **c. Sales Order API**

#### **2.6.2.4. Understanding Triggers and Web hooks**

When you are integrating with the Akaun Platform, instead of polling the APIs with repetitive schedulers, it is possible for the system integrators to be using Web Hooks for more efficient integrations.

#### **Webhooks**

##### **a. Briefing on webhook**

Webhooks are used in BigLedger to allow external integrations to be called whenever a particular event occurs. Usually, the event is an API call received by BigLedger.

For any kind of event such as creating vouchers or creating Items:

- From BigLedger side, a topic of webhook is created
- From external side, they will need to subscribe to those topics. And later when they do any operations like "create Item", the webhook will be triggered and they will get a response.

#### **2.6.2.5. Virtual ETL Applet**

Virtual Etl applet is an applet which for setting purpose including organization of the permission for etl APIs. Platform Sysadmin will be in charge of installing the the applet and granting necessary permission to access etl APIs.

Once the permission granted, the user may try to access the endpoint to ensure the permissions are successfully granted. The user also may visit this applet to see the list of permission being granted.

#### **2.6.3. ETL Endpoints**

These are list of etl endpoint with description. In order to use the api, please ensure you have the access key and access id. If you do not yet create access key and access id, please refer to this link ([Section 2.6.2.1, “Developer Account Registration and Configuration”](#))

The links of api will leads to stoplight documentation website for reference and testing purpose

##### **2.6.3.1. Financial Item API**

These links are documentation on sales order api

- bl\_fi\_mst\_item\_hdr
  - consist of details of the item
  - the child item of the group item is considered as single item(basic\_item)
- bl\_fi\_mst\_item\_ext

- this table store extra information which not stored in header or line
- bl\_fi\_mst\_item\_line
  - this table to store the child item after the child item being created in header table as single product. It is to link child item to specific group product.

#### **Create Financial Item**

<https://bigledger.stoplight.io/docs/blg-akaun-api-docs-public/5b75f5fe0e7aa-create-financial-item-etl>

#### **Update Financial Item**

<https://bigledger.stoplight.io/docs/blg-akaun-api-docs-public/295784efab326-update-financial-item-etl>

#### **Get all Financial Item**

<https://bigledger.stoplight.io/docs/blg-akaun-api-docs-public/0ee6f6e50f5e3-get-all-ecomsync-item-etl-ep>

#### **Get Financial Item by Guid**

<https://bigledger.stoplight.io/docs/blg-akaun-api-docs-public/7944401702018-get-financial-item-by-guid-etl>

#### **Get Financial Item by Criteria**

<https://bigledger.stoplight.io/docs/blg-akaun-api-docs-public/6df7f69f6c4f8-get-ecomsync-item-by-query-etl-ep>

#### **Delete Financial Item**

<https://bigledger.stoplight.io/docs/blg-akaun-api-docs-public/71405b7103746-delete-financial-item-by-guid-etl>

#### **Get All Financial Item Extension**

<https://bigledger.stoplight.io/docs/blg-akaun-api-docs-public/e51e41d5fc1a9-get-all-ecomsync-item-extensions-etl-ep>

#### **Create Financial Item Extension**

<https://bigledger.stoplight.io/docs/blg-akaun-api-docs-public/4a50f7cd4d7cf-create-ecomsync-item-extension-etl-ep>

#### **Update Financial Item Extension**

<https://bigledger.stoplight.io/docs/blg-akaun-api-docs-public/15ff4a9d542f9-update-ecomsync-item-extension-etl-ep>

### **Get Financial Item Extension By Guid**

<https://bigledger.stoplight.io/docs/blg-akaun-api-docs-public/97913c9d1d2ea-get-ecomsync-item-extension-by-guid-etl-ep>

### **Delete Financial Item Extension**

<https://bigledger.stoplight.io/docs/blg-akaun-api-docs-public/b82778b66b76c-delete-ecomsync-item-extension-by-guid-etl-ep>

### **Get Financial Item Extension By Criteria**

<https://bigledger.stoplight.io/docs/blg-akaun-api-docs-public/b0b7a9b4c805d-get-ecomsync-item-extension-by-query-etl-ep>

### **Get All Financial Item Line**

<https://bigledger.stoplight.io/docs/blg-akaun-api-docs-public/6edddaa835861e-get-all-ecomsync-item-lines-etl-ep>

### **Create Financial Item Line**

<https://bigledger.stoplight.io/docs/blg-akaun-api-docs-public/5df4b6cc4f6df-create-ecomsync-item-line-etl-ep>

### **Update Financial Item Line**

<https://bigledger.stoplight.io/docs/blg-akaun-api-docs-public/712933bd78ea8-update-ecomsync-item-line-etl-ep>

### **Get Financial Item Line By Guid**

<https://bigledger.stoplight.io/docs/blg-akaun-api-docs-public/c6d77508653f7-get-ecomsync-item-line-by-guid-etl-ep>

### **Delete Financial Item Line**

<https://bigledger.stoplight.io/docs/blg-akaun-api-docs-public/1c8eb2f0066e1-delete-ecomsync-item-line-by-guid-etl-ep>

### **Get Financial Item Line By Criteria**

<https://bigledger.stoplight.io/docs/blg-akaun-api-docs-public/92a7efd385ddd-get-ecomsync-item-line-by-query-etl-ep>

### **Add Files to Financial Item**

<https://bigledger.stoplight.io/docs/blg-akaun-api-docs-public/d968514aaa538-add-files-for-ecomsync-item-etl-ep>

### **Get File In Financial Item**

<https://bigledger.stoplight.io/docs/blg-akaun-api-docs-public/958568a53ac93-get-file-of-ecomsync->

## item-etl-ep

### 2.6.3.2. Ecomsync Item Api

Ecomsync item is where the product stored for marketplace such as Lazada, Shopee, CpCommerce or any Ecommerce platform. In order for any item to be created/synced from marketplace to blg database or vice versa, the item must be created in financial item beforehand through api [Section 2.6.3.1, “Financial Item API”](#) or doc item maintenance applet.

- bl\_fi\_mst\_ecomsync\_item\_hdr
  - compulsory table that need to be passed
  - consist of details of marketplace product
- bl\_fi\_mst\_ecomsync\_item\_ext
  - consists of extra information of the product that not exist in header or line table
- bl\_fi\_mst\_ecomsync\_item\_line
  - this table is storing marketplace product details for child item

#### Create Ecomsync Item

<https://bigledger.stoplight.io/docs/blg-akaun-api-docs-public/63fba45dbd3fc-create-ecomsync-item-etl-ep>

#### Update Ecomsync Item

<https://bigledger.stoplight.io/docs/blg-akaun-api-docs-public/bebff518c890b-update-ecomsync-item-etl-ep>

#### Get all Ecomsync Item

<https://bigledger.stoplight.io/docs/blg-akaun-api-docs-public/0ee6f6e50f5e3-get-all-ecomsync-item-etl-ep>

#### Get Ecomsync Item by Guid

<https://bigledger.stoplight.io/docs/blg-akaun-api-docs-public/be1c6ce90be69-get-ecomsync-item-by-guid-etl-ep>

#### Get Ecomsync Item by Criteria

<https://bigledger.stoplight.io/docs/blg-akaun-api-docs-public/6df7f69f6c4f8-get-ecomsync-item-by-query-etl-ep>

#### Delete Ecomsync Item

<https://bigledger.stoplight.io/docs/blg-akaun-api-docs-public/9545dd93ac5b4-delete-ecomsync-item-by-guid-etl-ep>

### **Create Ecomsync Item Extension**

<https://bigledger.stoplight.io/docs/blg-akaun-api-docs-public/4a50f7cd4d7cf-create-ecomsync-item-extension-etl-ep>

### **Update Ecomsync Item Extension**

<https://bigledger.stoplight.io/docs/blg-akaun-api-docs-public/15ff4a9d542f9-update-ecomsync-item-extension-etl-ep>

### **Get All Ecomsync Item Extension**

<https://bigledger.stoplight.io/docs/blg-akaun-api-docs-public/e51e41d5fc1a9-get-all-ecomsync-item-extensions-etl-ep>

### **Get Ecomsync Item Extension by Guid**

<https://bigledger.stoplight.io/docs/blg-akaun-api-docs-public/97913c9d1d2ea-get-ecomsync-item-extension-by-guid-etl-ep>

### **Get Ecomsync Item Extension by Criteria**

<https://bigledger.stoplight.io/docs/blg-akaun-api-docs-public/b0b7a9b4c805d-get-ecomsync-item-extension-by-query-etl-ep>

### **Delete Ecomsync Item Extension**

<https://bigledger.stoplight.io/docs/blg-akaun-api-docs-public/b82778b66b76c-delete-ecomsync-item-extension-by-guid-etl-ep>

### **Create Ecomsync Item Line**

<https://bigledger.stoplight.io/docs/blg-akaun-api-docs-public/5df4b6cc4f6df-create-ecomsync-item-line-etl-ep>

### **Update Ecomsync Item Line**

<https://bigledger.stoplight.io/docs/blg-akaun-api-docs-public/712933bd78ea8-update-ecomsync-item-line-etl-ep>

### **Get All Ecomsync Item Line**

<https://bigledger.stoplight.io/docs/blg-akaun-api-docs-public/6edddaa835861e-get-all-ecomsync-item-lines-etl-ep>

### **Get Ecomsync Item Line By Guid**

<https://bigledger.stoplight.io/docs/blg-akaun-api-docs-public/c6d77508653f7-get-ecomsync-item-line-by-guid-etl-ep>

### **Get Ecomsync Item Line by Criteria**

<https://bigledger.stoplight.io/docs/blg-akaun-api-docs-public/92a7efd385ddd-get-ecomsync-item-line->

## [by-query-etl-ep](#)

### **Delete Ecomsync Item Line**

<https://bigledger.stoplight.io/docs/blg-akaun-api-docs-public/1c8eb2f0066e1-delete-ecomsync-item-line-by-guid-etl-ep>

### **Add Multiple Files In Ecomsync Item**

<https://bigledger.stoplight.io/docs/blg-akaun-api-docs-public/d968514aaa538-add-files-for-ecomsync-item-etl-ep>

### **Get File In Ecomsync Item**

<https://bigledger.stoplight.io/docs/blg-akaun-api-docs-public/958568a53ac93-get-file-of-ecomsync-item-etl-ep>

### **2.6.3.3. Stock Availability API**

This api to get stock availability of the product which synced from marketplace. To get stock availability, you may refer to Ecomsync Item Api([Section 2.6.3.2, “Ecomsync Item Api”](#)). The stock availability is stored in bl\_fi\_mst\_ecomsync\_item\_hdr.qty\_balance.

The different between stock availability and stock balance is stock availability is the stock which can be sold to customer while stock balance is the stock which exist/hold by the branch. Meaning if the stock has been ordered(sales order created), the stock will be deducted from stock availability as it is already booked for the customer. Once sales invoice created, the stock will also be deducted from stock balance.

The stock balance is obtained from multiple branches which will be configured by users in organization applet.Based on this selection of branches, everytime the sales order created, the system will updated the stock availability in bl\_fi\_mst\_ecomsync\_item\_hdr.qty\_balance where the mkt\_guid(branch/marketplace) part of branch that are configured.

The calculation of stock availability as followed

- Single item

- Qty\_To\_Sync\_To\_Marketplace = Qty\_of\_System\_Stock(multiple locations) - Qty\_of\_Open\_Sales\_order - Qty\_buffer\_configured
  - bl\_fi\_mst\_ecomsync\_item\_hdr.qty\_buffer = Qty\_buffer\_configured → this figure is set in the organization applet
    - qty\_buffer is the total stock that will be held from included in stock availability. The purpose is ensured there are extra stock in case of emergency or reserved for specific reason.
    - Qty\_of\_Open\_Sales\_order is calculated from bl\_fi\_generic\_doc\_line\_open\_queue

### **2.6.3.4. Sales Order API**

Sales order consists of five tables for data storing which are:

- bl\_fi\_generic\_doc\_hdr
  - compulsory table that need to be passed
  - consist of details of sales order including sales order number, billing and delivery details
- bl\_fi\_generic\_doc\_line
  - consists of details of item including voucher involve in sales order transaction
- bl\_fi\_generic\_doc\_ext
  - this table store extra information which not stored in bl\_fi\_generic\_doc\_hdr
- bl\_fi\_generic\_doc\_event
  - this table for report tracking purpose. For example when sales order successfully synced from marketplace, the row will be inserted to indicate the syncing process happened
- bl\_fi\_generic\_doc\_link
  - this table to link the generic document. It can link from any server doc type such sales order, sales invoice etc

#### **Create sales order**

<https://bigledger.stoplight.io/docs/blg-akaun-api-docs-public/efd10d9cc76c9-internal-sales-order-insert-etl-ep>

#### **Update sales order**

<https://bigledger.stoplight.io/docs/blg-akaun-api-docs-public/94aaf04d32918-internal-sales-order-update-etl-ep>

#### **Get all sales order**

<https://bigledger.stoplight.io/docs/blg-akaun-api-docs-public/ab3844710a466-internal-sales-order-get-all-etl-ep>

#### **Get sales order by guid**

- What if there's membership points to be rewarded?
- To understand the difference between the txn\_class = PNS vs STL\_MTHD
  - See this google spreadsheet [https://docs.google.com/spreadsheets/d/1\\_1ETNP4arvLpL5T\\_fI2A3xrnyfq7Lw8g7X-v46XdVyg/edit#gid=0](https://docs.google.com/spreadsheets/d/1_1ETNP4arvLpL5T_fI2A3xrnyfq7Lw8g7X-v46XdVyg/edit#gid=0)
  - Athirah, please get the video recording of this google spreadsheet discussion from Aida and paste here.

#### **Create sales order**

<https://bigledger.stoplight.io/docs/blg-akaun-api-docs-public/efd10d9cc76c9-internal-sales-order-insert-etl-ep>

## **Update sales order**

<https://bigledger.stoplight.io/docs/blg-akaun-api-docs-public/94aaf04d32918-internal-sales-order-update-etl-ep>

## **Get all sales order**

<https://bigledger.stoplight.io/docs/blg-akaun-api-docs-public/ab3844710a466-internal-sales-order-get-all-etl-ep>

## **Get sales order by specific guid**

<https://bigledger.stoplight.io/docs/blg-akaun-api-docs-public/0c36501cddfbf-internal-sales-order-get-by-guid-etl-ep>

## **Frequently Asked Question**

### **PNS VS STL\_MTHD**

PNS(product and services) is txn\_type which involve the transaction of product or service while STL\_MTHD is the settlement method involved payment in any kind of form such as cash, debit card, or voucher. Once there is order created, that is considered PNS as it involve sales of the product. When the customer pay by cash, the receipt is issued and this is considered as STL\_MTHD. To understand further, you may watch the video in the link <https://drive.google.com/file/d/1rzXKloxaXKT2ADwugYIrjJvxbQGYuKMY/view>

### **Can sales order being edited multiple times?**

Sales order can not be edited once the sales order is finalized. In order to know if the sales order is finalized, you may refer to column bl\_fi\_generic\_doc\_hdr.posting\_status. If the column is 'FINAL', the data can not be edited except for remarks column.

# **Chapter 3. Industry Guide**

## **3.1. Overview**

### **3.1.1. Industry Guide - Introduction**

For each of the following industry covered in this guide, we provide you with the following:

- Background
- Identify the problems, goals
- Assumptions
- Evaluation of the case (finding the root cause)
- Proposed solution / changes and compare with alternate solutions.
- Recommendations with reasons and justifications
- Appendices (charts , financials , visuals)

## **3.2. Consumer Electronics Industry**

### **3.2.1. Overview**

### **3.2.2. Solutions**

### **3.2.3. Stories**

### **3.2.4. FAQs**

## **3.3. Pharmacy Industry**

### **3.3.1. Overview**

### **3.3.2. Solutions**

### **3.3.3. Stories**

### **3.3.4. FAQs**

## **3.4. Car Workshops**

### **3.4.1. Overview**

### **3.4.2. Solutions**

**3.4.3. Stories**

**3.4.4. FAQs**

## **3.5. Retail Chainstores**

**3.5.1. Overview**

**3.5.2. Solutions**

**3.5.3. Stories**

**3.5.4. FAQs**

## **3.6. Logistics Industry**

**3.6.1. Overview**

**3.6.2. Solutions**

**3.6.3. Stories**

**3.6.4. FAQs**

## **3.7. Manufacturing Industry**

**3.7.1. Overview**

**3.7.2. Solutions**

**3.7.3. Stories**

**3.7.4. FAQs**

## **3.8. Pet Industry**

**3.8.1. Overview**

**3.8.2. Solutions**

**3.8.3. Stories**

### **3.8.4. FAQs**

# Chapter 4. Guide by Modules

The Akaun platform is like lego blocks, users will be able to mix and match different applets to formulate a new module, even if it is not in the list below.

## 4.1. Module Guide

### 4.1.1. Introduction

this is the introduction to module guide.

## 4.2. Core Module

### 4.2.1. Introduction

This Section provide you a high level overview of what is in the "Core Module", so that you have a good understanding of how various applets work together. For the detail user guide for each of the applet, you may click on the links below, and drill down for further details.

#### 4.2.1.1. Overview

"Core Module" is the only module that is depended by all other modules in the system.

#### 4.2.1.2. Core Module Applets

The core module consiste of the following applets:

- [Section A.18, “Tax Configuration Applet”](#)
- [Section A.14, “Organization Applet”](#)
- [Section A.5, “Chart of Account Applet”](#)
- [Section A.8, “Doc Item Maintenance Applet”](#)
- [Section A.4, “Cashbook Applet”](#)
- [Section A.11, “Inventory Item Maintenance Applet”](#)
- [Section A.10, “Entity Maintenance Applet”](#)
- [Section A.7, “Customer Maintenance Applet”](#)
- [Section A.9, “Employee Maintenance Applet”](#)
- [Section A.17, “Supplier Maintenance Applet”](#)

#### 4.2.1.3. Core Module Features and Functions

The "Core Module" is the foundation of all other applets.

#### 4.2.1.4. What's New

#### **4.2.1.5. Getting Started**

#### **4.2.1.6. Module Dependencies**

### **4.2.2. Module Name - Unique Value Proposition**

### **4.2.3. Core Module - Related Applets**

- [Section A.18, “Tax Configuration Applet”](#)
- [Section A.14, “Organization Applet”](#)
- [Section A.5, “Chart of Account Applet”](#)

### **4.2.4. Module Name - Project Implementation Steps**

#### **4.2.4.1. Scope Management (End Results)**

*Begin with the end in mind*

- This is where we define the end results and priorities
- We decide what to do in phase 1, phase 2, phase 3 etc.
- This is where we create the WBS (Work Break Down) as well.

#### **4.2.4.2. Project Gantt Chart**

- Defining Activities
  - List down all the activities involved for each work breakdown
- Sequence Activities
  - Which one first, which one next
- Estimated Resource Requirements for each activity
  - Estimate how long it will take, what skills may be required to do this
- Schedule
  - Identify the activities dependency, and based on resource availability , developing a schedule
- Identify Critical Path

#### **4.2.4.3. Project Kickstart Meeting**

#### **4.2.4.4. Weekly Meeting**

#### **4.2.4.5. Agile Method**

#### **4.2.4.6. Cashflow Projection**

#### **4.2.4.7. Human Resource Management**

- Milestones and Rewards

#### **4.2.4.8. Communication Management**

#### **4.2.4.9. Risk Management**

- Identify third party dependency
- Identify backup plans
- Identify contingency plans

#### **4.2.4.10. UAT (User Acceptance Test)**

#### **4.2.4.11. Requirement Analysis**

#### **4.2.4.12. Project Goes Live**

#### **4.2.4.13. Post Mortem**

### **4.3. Accounting Module**

#### **4.3.1. Introduction**

The intention of this section in the documentation. What this section cover, and not covering... and how it will link to othe other modules. Explaining that certain detail about

##### **4.3.1.1. Overview**

Some background of why this module was developed Provide a summary of what this module does and doesn't do.

##### **4.3.1.2. Applets**

##### **4.3.1.3. Features and Functions**

##### **4.3.1.4. What's New**

##### **4.3.1.5. Getting Started**

##### **4.3.1.6. Module Dependencies**

#### **4.3.2. Accounting - Unique Value Proposition**

#### **4.3.3. Accounting Module - Related Applets**

## **4.3.4. Module Name - Project Implementation Steps**

### **4.3.4.1. Scope Management (End Results)**

*Begin with the end in mind*

- This is where we define the end results and priorities
- We decide what to do in phase 1, phase 2, phase 3 etc.
- This is where we create the WBS (Work Break Down) as well.

### **4.3.4.2. Project Gantt Chart**

- Defining Activities
  - List down all the activities involved for each work breakdown
- Sequence Activities
  - Which one first, which one next
- Estimated Resource Requirements for each activity
  - Estimate how long it will take, what skills may be required to do this
- Schedule
  - Identify the activities dependency, and based on resource availability , developing a schedule
- Identify Critical Path

### **4.3.4.3. Project Kickstart Meeting**

### **4.3.4.4. Weekly Meeting**

### **4.3.4.5. Agile Method**

### **4.3.4.6. Cashflow Projection**

### **4.3.4.7. Human Resource Management**

- Milestones and Rewards

### **4.3.4.8. Communication Management**

### **4.3.4.9. Risk Management**

- Identify third party dependency
- Identify backup plans
- Identify contingency plans

### **4.3.4.10. UAT (User Acceptance Test)**

#### **4.3.4.11. Requirement Analysis**

#### **4.3.4.12. Project Goes Live**

#### **4.3.4.13. Post Mortem**

## **4.4. Inventory Module**

### **4.4.1. Introduction**

The intention of this section in the documentation. What this section cover, and not covering... and how it will link to othe other modules. Explaining that certain detail about

#### **4.4.1.1. Overview**

Some background of why this module was developed Provide a summary of what this module does and doesn't do.

#### **4.4.1.2. Applets**

#### **4.4.1.3. Features and Functions**

#### **4.4.1.4. What's New**

#### **4.4.1.5. Getting Started**

#### **4.4.1.6. Module Dependencies**

### **4.4.2. Inventory Module - Unique Value Proposition**

### **4.4.3. Inventory Module - Related Applets**

### **4.4.4. Inventory Module - Project Implementation Steps**

#### **4.4.4.1. Scope Management (End Results)**

*Begin with the end in mind*

- This is where we define the end results and priorities
- We decide what to do in phase 1, phase 2, phase 3 etc.
- This is where we create the WBS (Work Break Down) as well.

#### **4.4.4.2. Project Gantt Chart**

- Defining Activities
  - List down all the activities involved for each work breakdown
- Sequence Activities

- Which one first, which one next
- Estimated Resource Requirements for each activity
  - Estimate how long it will take, what skills may be required to do this
- Schedule
  - Identify the activities dependency, and based on resource availability , developing a schedule
- Identify Critical Path

#### **4.4.4.3. Project Kickstart Meeting**

#### **4.4.4.4. Weekly Meeting**

#### **4.4.4.5. Agile Method**

#### **4.4.4.6. Cashflow Projection**

#### **4.4.4.7. Human Resource Management**

- Milestones and Rewards

#### **4.4.4.8. Communication Management**

#### **4.4.4.9. Risk Management**

- Identify third party dependency
- Identify backup plans
- Identify contingency plans

#### **4.4.4.10. UAT (User Acceptance Test)**

#### **4.4.4.11. Requirement Analysis**

#### **4.4.4.12. Project Goes Live**

#### **4.4.4.13. Post Mortem**

### **4.5. Point of Sales Module**

#### **4.5.1. Introduction**

The intention of this section in the documentation. What this section cover, and not covering... and how it will link to othe other modules. Explaining that certain detail about

#### **4.5.1.1. Overview**

Some background of why this module was developed Provide a summary of what this module does

and doesn't do.

#### **4.5.1.2. Applets**

#### **4.5.1.3. Features and Functions**

#### **4.5.1.4. What's New**

#### **4.5.1.5. Getting Started**

#### **4.5.1.6. Module Dependencies**

### **4.5.2. Point of Sales - Unique Value Proposition**

### **4.5.3. Point of Sales Module - Related Applets**

### **4.5.4. Point of Sales Module - Project Implementation Steps**

#### **4.5.4.1. Scope Management (End Results)**

*Begin with the end in mind*

- This is where we define the end results and priorities
- We decide what to do in phase 1, phase 2, phase 3 etc.
- This is where we create the WBS (Work Break Down) as well.

#### **4.5.4.2. Project Gantt Chart**

- Defining Activities
  - List down all the activities involved for each work breakdown
- Sequence Activities
  - Which one first, which one next
- Estimated Resource Requirements for each activity
  - Estimate how long it will take, what skills may be required to do this
- Schedule
  - Identify the activities dependency, and based on resource availability , developing a schedule
- Identify Critical Path

#### **4.5.4.3. Project Kickstart Meeting**

#### **4.5.4.4. Weekly Meeting**

#### **4.5.4.5. Agile Method**

#### **4.5.4.6. Cashflow Projection**

#### **4.5.4.7. Human Resource Management**

- Milestones and Rewards

#### **4.5.4.8. Communication Management**

#### **4.5.4.9. Risk Management**

- Identify third party dependency
- Identify backup plans
- Identify contingency plans

#### **4.5.4.10. UAT (User Acceptance Test)**

#### **4.5.4.11. Requirement Analysis**

#### **4.5.4.12. Project Goes Live**

#### **4.5.4.13. Post Mortem**

## **4.6. Manufacturing Module**

### **4.6.1. Introduction**

The intention of this section in the documentation. What this section cover, and not covering... and how it will link to othe other modules. Explaining that certain detail about

#### **4.6.1.1. Overview**

Some background of why this module was developed Provide a summary of what this module does and doesn't do.

#### **4.6.1.2. Applets**

#### **4.6.1.3. Features and Functions**

#### **4.6.1.4. What's New**

#### **4.6.1.5. Getting Started**

#### **4.6.1.6. Module Dependencies**

### **4.6.2. Manufacturing - Unique Value Proposition**

### **4.6.3. Manufacturing - Related Applets**

## **4.6.4. Manufacturing - Project Implementation Steps**

### **4.6.4.1. Scope Management (End Results)**

*Begin with the end in mind*

- This is where we define the end results and priorities
- We decide what to do in phase 1, phase 2, phase 3 etc.
- This is where we create the WBS (Work Break Down) as well.

### **4.6.4.2. Project Gantt Chart**

- Defining Activities
  - List down all the activities involved for each work breakdown
- Sequence Activities
  - Which one first, which one next
- Estimated Resource Requirements for each activity
  - Estimate how long it will take, what skills may be required to do this
- Schedule
  - Identify the activities dependency, and based on resource availability , developing a schedule
- Identify Critical Path

### **4.6.4.3. Project Kickstart Meeting**

### **4.6.4.4. Weekly Meeting**

### **4.6.4.5. Agile Method**

### **4.6.4.6. Cashflow Projection**

### **4.6.4.7. Human Resource Management**

- Milestones and Rewards

### **4.6.4.8. Communication Management**

### **4.6.4.9. Risk Management**

- Identify third party dependency
- Identify backup plans
- Identify contingency plans

### **4.6.4.10. UAT (User Acceptance Test)**

#### **4.6.4.11. Requirement Analysis**

#### **4.6.4.12. Project Goes Live**

#### **4.6.4.13. Post Mortem**

## **4.7. Membership Module**

### **4.7.1. Membership Module Introduction**

The intention of this section in the documentation. What this section cover, and not covering... and how it will link to othe other modules. Explaining that certain detail about

#### **4.7.1.1. Membership Module Overview**

Some background of why this module was developed Provide a summary of what this module does and doesn't do.

#### **4.7.1.2. Membership Module Applets**

#### **4.7.1.3. Membership Module Features and Functions**

#### **4.7.1.4. What's New**

#### **4.7.1.5. Getting Started**

#### **4.7.1.6. Module Dependencies**

### **4.7.2. Membership - Unique Value Proposition**

### **4.7.3. Membership - Related Applets**

### **4.7.4. Membership - Project Implementation Steps**

#### **4.7.4.1. Scope Management (End Results)**

*Begin with the end in mind*

- This is where we define the end results and priorities
- We decide what to do in phase 1, phase 2, phase 3 etc.
- This is where we create the WBS (Work Break Down) as well.

#### **4.7.4.2. Project Gantt Chart**

- Defining Activities
  - List down all the activities involved for each work breakdown
- Sequence Activities

- Which one first, which one next
- Estimated Resource Requirements for each activity
  - Estimate how long it will take, what skills may be required to do this
- Schedule
  - Identify the activities dependency, and based on resource availability , developing a schedule
- Identify Critical Path

#### **4.7.4.3. Project Kickstart Meeting**

#### **4.7.4.4. Weekly Meeting**

#### **4.7.4.5. Agile Method**

#### **4.7.4.6. Cashflow Projection**

#### **4.7.4.7. Human Resource Management**

- Milestones and Rewards

#### **4.7.4.8. Communication Management**

#### **4.7.4.9. Risk Management**

- Identify third party dependency
- Identify backup plans
- Identify contingency plans

#### **4.7.4.10. UAT (User Acceptance Test)**

#### **4.7.4.11. Requirement Analysis**

#### **4.7.4.12. Project Goes Live**

#### **4.7.4.13. Post Mortem**

### **4.8. Referral Module**

#### **4.8.1. Introduction**

The intention of this section in the documentation. What this section cover, and not covering... and how it will link to othe other modules. Explaining that certain detail about

#### **4.8.1.1. Overview**

Some background of why this module was developed Provide a summary of what this module does

and doesn't do.

#### **4.8.1.2. Applets**

#### **4.8.1.3. Features and Functions**

#### **4.8.1.4. What's New**

#### **4.8.1.5. Getting Started**

#### **4.8.1.6. Module Dependencies**

### **4.8.2. Referral - Unique Value Proposition**

### **4.8.3. Referral Module - Related Applets**

### **4.8.4. Module Name - Project Implementation Steps**

#### **4.8.4.1. Scope Management (End Results)**

*Begin with the end in mind*

- This is where we define the end results and priorities
- We decide what to do in phase 1, phase 2, phase 3 etc.
- This is where we create the WBS (Work Break Down) as well.

#### **4.8.4.2. Project Gantt Chart**

- Defining Activities
  - List down all the activities involved for each work breakdown
- Sequence Activities
  - Which one first, which one next
- Estimated Resource Requirements for each activity
  - Estimate how long it will take, what skills may be required to do this
- Schedule
  - Identify the activities dependency, and based on resource availability , developing a schedule
- Identify Critical Path

#### **4.8.4.3. Project Kickstart Meeting**

#### **4.8.4.4. Weekly Meeting**

#### **4.8.4.5. Agile Method**

#### **4.8.4.6. Cashflow Projection**

#### **4.8.4.7. Human Resource Management**

- Milestones and Rewards

#### **4.8.4.8. Communication Management**

#### **4.8.4.9. Risk Management**

- Identify third party dependency
- Identify backup plans
- Identify contingency plans

#### **4.8.4.10. UAT (User Acceptance Test)**

#### **4.8.4.11. Requirement Analysis**

#### **4.8.4.12. Project Goes Live**

#### **4.8.4.13. Post Mortem**

## **4.9. Customer Relationship Management**

### **4.9.1. Introduction**

The intention of this section in the documentation. What this section cover, and not covering... and how it will link to othe other modules. Explaining that certain detail about

#### **4.9.1.1. Overview**

Some background of why this module was developed Provide a summary of what this module does and doesn't do.

- Sales Funnel ⇒ Search Engine Optimization ⇒ LD-JSON in CP-Commerce / Facebook pixel, Google pixel, LinkedIn pixel, Tiktok Pixel ⇒ Sales Lead Generation through SEO / Adwords etc ⇒ Visitor Tracking URL Shortener

=> Capturing these sales leads inside the CP-Commerce Module  
=> Creating Sales Lead automatically in the SFA Applet (and then triggering customer journey), or bringing the customer to UCC

- Customer 360 ⇒ Contact Maintenance Applet ⇒ Segmentation of contacts / members / customers / sales leads ⇒ Full history of all transactional data ⇒ Either using BLG ERP module or Virtual ETL applet to sync transactional data from other systems
- Touch Points ⇒ UCC Applet ⇒ CP-Commerce: Mobile Apps / Web / Mobile Web ⇒ Point of Sales
- Customer Journey ⇒ Digital-Marketing ⇒ CP-Commerce: Topic subscriptions for newsletter ⇒

CP-Commerce: Tracking consumer interest - viewing which products etc

- Customer Service ⇒ Issue Tracker Applet ⇒ RMA ⇒ Statements and Billings
- Analytics ⇒ Segmentations ⇒ ROI on Adwords ⇒ Customer churn
- Robotic Automation ⇒ Custom scripts , reminders

#### **4.9.1.2. Applets**

#### **4.9.1.3. Features and Functions**

#### **4.9.1.4. What's New**

#### **4.9.1.5. Getting Started**

#### **4.9.1.6. Module Dependencies**

### **4.9.2. CRM - Unique Value Proposition**

### **4.9.3. CRM - Related Applets**

- URL-Shortener Applet (optional)
- SFA Applet (optional)
- CP-Commerce Applet (optional)
- Digital Marketing Applet (optional)
- Contact Maintenance Applet (compulsory)
- Core Module applets
- Issue Tracker Applet
- RMA Applet
- Statement and Billings Applet
- Point of Sales Applet (optional)

### **4.9.4. CRM - Project Implementation Steps**

#### **4.9.4.1. Scope Management (End Results)**

*Begin with the end in mind*

- This is where we define the end results and priorities
- We decide what to do in phase 1, phase 2, phase 3 etc.
- This is where we create the WBS (Work Break Down) as well.

#### **4.9.4.2. Project Gantt Chart**

- Defining Activities

- List down all the activities involved for each work breakdown
- Sequence Activities
  - Which one first, which one next
- Estimated Resource Requirements for each activity
  - Estimate how long it will take, what skills may be required to do this
- Schedule
  - Identify the activities dependency, and based on resource availability , developing a schedule
- Identify Critical Path

#### **4.9.4.3. Project Kickstart Meeting**

#### **4.9.4.4. Weekly Meeting**

#### **4.9.4.5. Agile Method**

#### **4.9.4.6. Cashflow Projection**

#### **4.9.4.7. Human Resource Management**

- Milestones and Rewards

#### **4.9.4.8. Communication Management**

#### **4.9.4.9. Risk Management**

- Identify third party dependency
- Identify backup plans
- Identify contingency plans

#### **4.9.4.10. UAT (User Acceptance Test)**

#### **4.9.4.11. Requirement Analysis**

#### **4.9.4.12. Project Goes Live**

#### **4.9.4.13. Post Mortem**

## **4.10. Contact Center Module**

### **4.10.1. Introduction**

The intention of this section in the documentation. What this section cover, and not covering... and how it will link to othe other modules. Explaining that certain detail about

#### **4.10.1.1. Overview**

Some background of why this module was developed Provide a summary of what this module does and doesn't do.

#### **4.10.1.2. Applets**

#### **4.10.1.3. Features and Functions**

#### **4.10.1.4. What's New**

#### **4.10.1.5. Getting Started**

#### **4.10.1.6. Module Dependencies**

### **4.10.2. Contact Center - Unique Value Proposition**

### **4.10.3. Contact Center - Related Applets**

- [Section A.19, “UCC Applet”](#)

### **4.10.4. Contact Center - Project Implementation Steps**

#### **4.10.4.1. Scope Management (End Results)**

*Begin with the end in mind*

- This is where we define the end results and priorities
- We decide what to do in phase 1, phase 2, phase 3 etc.
- This is where we create the WBS (Work Break Down) as well.

#### **4.10.4.2. Project Gantt Chart**

- Defining Activities
  - List down all the activities involved for each work breakdown
- Sequence Activities
  - Which one first, which one next
- Estimated Resource Requirements for each activity
  - Estimate how long it will take, what skills may be required to do this
- Schedule
  - Identify the activities dependency, and based on resource availability , developing a schedule
- Identify Critical Path

#### **4.10.4.3. Project Kickstart Meeting**

#### **4.10.4.4. Weekly Meeting**

#### **4.10.4.5. Agile Method**

#### **4.10.4.6. Cashflow Projection**

#### **4.10.4.7. Human Resource Management**

- Milestones and Rewards

#### **4.10.4.8. Communication Management**

#### **4.10.4.9. Risk Management**

- Identify third party dependency
- Identify backup plans
- Identify contingency plans

#### **4.10.4.10. UAT (User Acceptance Test)**

#### **4.10.4.11. Requirement Analysis**

#### **4.10.4.12. Project Goes Live**

#### **4.10.4.13. Post Mortem**

### **4.11. Digital Marketing Module**

#### **4.11.1. Introduction**

The intention of this section in the documentation. What this section cover, and not covering... and how it will link to othe other modules. Explaining that certain detail about

#### **4.11.1.1. Overview**

Some background of why this module was developed Provide a summary of what this module does and doesn't do.

#### **4.11.1.2. Applets**

#### **4.11.1.3. Features and Functions**

#### **4.11.1.4. What's New**

#### **4.11.1.5. Getting Started**

#### **4.11.1.6. Module Dependencies**

### **4.11.2. Digital Marketing - Unique Value Proposition**

### **4.11.3. Digital Marketing - Related Applets**

### **4.11.4. Digital Marketing - Project Implementation Steps**

#### **4.11.4.1. Scope Management (End Results)**

*Begin with the end in mind*

- This is where we define the end results and priorities
- We decide what to do in phase 1, phase 2, phase 3 etc.
- This is where we create the WBS (Work Break Down) as well.

#### **4.11.4.2. Project Gantt Chart**

- Defining Activities
  - List down all the activities involved for each work breakdown
- Sequence Activities
  - Which one first, which one next
- Estimated Resource Requirements for each activity
  - Estimate how long it will take, what skills may be required to do this
- Schedule
  - Identify the activities dependency, and based on resource availability , developing a schedule
- Identify Critical Path

#### **4.11.4.3. Project Kickstart Meeting**

#### **4.11.4.4. Weekly Meeting**

#### **4.11.4.5. Agile Method**

#### **4.11.4.6. Cashflow Projection**

#### **4.11.4.7. Human Resource Management**

- Milestones and Rewards

#### **4.11.4.8. Communication Management**

#### **4.11.4.9. Risk Management**

- Identify third party dependency
- Identify backup plans
- Identify contingency plans

#### **4.11.4.10. UAT (User Acceptance Test)**

#### **4.11.4.11. Requirement Analysis**

#### **4.11.4.12. Project Goes Live**

#### **4.11.4.13. Post Mortem**

## **4.12. Marketplace Connector Module**

### **4.12.1. Introduction**

The intention of this section in the documentation. What this section cover, and not covering... and how it will link to othe other modules. Explaining that certain detail about

#### **4.12.1.1. Overview**

Some background of why this module was developed Provide a summary of what this module does and doesn't do.

#### **4.12.1.2. Applets**

#### **4.12.1.3. Features and Functions**

#### **4.12.1.4. What's New**

#### **4.12.1.5. Getting Started**

#### **4.12.1.6. Module Dependencies**

### **4.12.2. Marketplace Connector - Unique Value Proposition**

### **4.12.3. Marketplace Connector - Related Applets**

### **4.12.4. Marketplace Connector - Project Implementation Steps**

#### **4.12.4.1. Scope Management (End Results)**

*Begin with the end in mind*

- This is where we define the end results and priorities
- We decide what to do in phase 1, phase 2, phase 3 etc.
- This is where we create the WBS (Work Break Down) as well.

#### **4.12.4.2. Project Gantt Chart**

- Defining Activities
  - List down all the activities involved for each work breakdown

- Sequence Activities
  - Which one first, which one next
- Estimated Resource Requirements for each activity
  - Estimate how long it will take, what skills may be required to do this
- Schedule
  - Identify the activities dependency, and based on resource availability , developing a schedule
- Identify Critical Path

#### **4.12.4.3. Project Kickstart Meeting**

#### **4.12.4.4. Weekly Meeting**

#### **4.12.4.5. Agile Method**

#### **4.12.4.6. Cashflow Projection**

#### **4.12.4.7. Human Resource Management**

- Milestones and Rewards

#### **4.12.4.8. Communication Management**

#### **4.12.4.9. Risk Management**

- Identify third party dependency
- Identify backup plans
- Identify contingency plans

#### **4.12.4.10. UAT (User Acceptance Test)**

#### **4.12.4.11. Requirement Analysis**

#### **4.12.4.12. Project Goes Live**

#### **4.12.4.13. Post Mortem**

### **4.13. Delivery Fulfillment Module**

#### **4.13.1. Introduction**

The intention of this section in the documentation. What this section cover, and not covering... and how it will link to othe other modules. Explaining that certain detail about

#### **4.13.1.1. Overview**

Some background of why this module was developed Provide a summary of what this module does and doesn't do.

#### **4.13.1.2. Applets**

#### **4.13.1.3. Features and Functions**

#### **4.13.1.4. What's New**

#### **4.13.1.5. Getting Started**

#### **4.13.1.6. Module Dependencies**

### **4.13.2. Delivery Fulfillment - Unique Value Proposition**

### **4.13.3. Delivery Fulfillment - Related Applets**

### **4.13.4. Delivery Fulfillment - Project Implementation Steps**

#### **4.13.4.1. Scope Management (End Results)**

*Begin with the end in mind*

- This is where we define the end results and priorities
- We decide what to do in phase 1, phase 2, phase 3 etc.
- This is where we create the WBS (Work Break Down) as well.

#### **4.13.4.2. Project Gantt Chart**

- Defining Activities
  - List down all the activities involved for each work breakdown
- Sequence Activities
  - Which one first, which one next
- Estimated Resource Requirements for each activity
  - Estimate how long it will take, what skills may be required to do this
- Schedule
  - Identify the activities dependency, and based on resource availability , developing a schedule
- Identify Critical Path

#### **4.13.4.3. Project Kickstart Meeting**

#### **4.13.4.4. Weekly Meeting**

#### **4.13.4.5. Agile Method**

#### **4.13.4.6. Cashflow Projection**

#### **4.13.4.7. Human Resource Management**

- Milestones and Rewards

#### **4.13.4.8. Communication Management**

#### **4.13.4.9. Risk Management**

- Identify third party dependency
- Identify backup plans
- Identify contingency plans

#### **4.13.4.10. UAT (User Acceptance Test)**

#### **4.13.4.11. Requirement Analysis**

#### **4.13.4.12. Project Goes Live**

#### **4.13.4.13. Post Mortem**

### **4.14. CP Commerce Module**

#### **4.14.1. Introduction**

This section provides you the guide to implementing the **CP Commerce** module. You will get to know what is included in the CP Commerce module, how to use it, how to get started and what are the features that you can use to launch your next e-commerce project.

#### **4.14.1.1. CP Commerce Overview**

**CP Commerce** stands for "Cross Platform Commerce". Most of our customers use the CP Commerce module for the following reasons:

- Cross Platform The CP Commerce supports desktop web, mobile web, android and ios platforms. With hybrid technologies,
- Flexible
  - Powerful layout engine to allow for any layouts and any widgets to be configured for different pages in the website.
- Cost Effective
- There's no need to power up another server because the e-commerce website is running on serverless and cloud native technologies
- Integrated

- Out of the box integration with inventory module, accounting module, market places, point of sales and conversation commerce, no more painful integration and no more duplicated data entry.
- SEO Optimized
  - Support LD-JSON format
- Multi-Lingual and Multi-Country
  - Payment Gateway integration across 33 countries when using it with our PGW Module
  - Different products for different countries is supported, auto switching of payment gateway based on country
  - Same products sold in different currencies is also supported
  - Support for multiple timezones
- Scalable
  - Backend is using serverless and cloud native technologies
  - Performing as usual during peak seasons
- Powerful search
- Improved User Experience (PWA)
  - No page reload like those applications built with PHP websites
  - Responsive to screen size, seamless experience on mobile devices
  - Automatic caching of images for faster speed
- Re-targetting
  - Facebook pixel
  - LinkedIn
- Add-ons
- Shipping Fees
- Inventory Stock
  - Able to display stock balance across multiple warehouses and stores
  - Advanced formula to calculate the stock availability by deducting "open sales order" from the "inventory stock balance" to avoid out of stock situation
- Marketplace Integration
  - With the integrated **Marketplace Connector**, users can import images, product name, pricing and other information from Lazada and Shopee, saving valuable time to get started
- Rich API
  - Excellent for integration with other ERP / Accounting systems
- Vouchers
- Membership Program
- Various Product Types

- Single product
- Variants (Grouped Product)
- Bundle
- Extended Warranty
- Purchase With Purchase
- RMA (Service Note)
- Pricing Scheme
- Promotions
- Content Management
- Unlimited Categories
- Mailing lists and Topic subscriptions
- Using rebate during checkout
- Branch locators
- Unified Contact Centre
  - WebChat
- Multiple Login Methods
  - Despite multiple login methods, they are all consolidated as a single login-id.
  - Users can login with email/password, phone/sms, Google Login, Facebook Login, Apple Login
- Delivery and Fulfillment
  - Printing , Picking , Packing
  - Trips Planning and Drivers allocation
- Analytics
  - Analysis of abandoned shopping cart
  - Linking to Google Analytics
  - Review and ratings of products
  - Products clicks and page views
  - Abandoned shopping carts
  - Favourites and visitor profiles
- Abandoned shopping cart
  - Automation to create outbound notifications and automatically create sales leads for agents to follow up and assist customer to
  - Customers are able to view their previously abandoned shopping cart
  - Contact center agents are able to assist the customer to complete their shopping cart, and request for payments within messaging applications (conversational commerce)
- Favourite lists

- Understanding the customer's preferences and subsequently send targetted email / whatsapp messages on promotions
- Product Reviews and Ratings
  - Able to set multiple reviews per product, so that customers are able to feedback on multiple perspectives of the product, not just how many stars. For example: (1) Satisfaction the product (2) Delivery Speed (3) After sales support etc..

The CP Commerce is also being used as B2B Portal for both suppliers and resellers (dealers) for the following reasons.

- Full transaction history and billing statements
- Full receipts
- Restricted access
- Multiple websites with different pricing scheme
- Credit Limit control
  - Checkout now pay later
- Single Login Multiple Accounts (Entities), Each Account supports Multiple Memberships
- Single Account with multiple logins
- Online Forms
- Blocked Users and Spending Limits
- Multi-UOM

Some background of why this module was developed Provide a summary of what this module does and doesn't do.

#### **4.14.1.2. CP Commerce Applets**

- [CP Commerce Admin Applet](#)
- Media Library Applet
- Platform SysAdmin Applet

\*

#### **4.14.1.3. Features and Functions**

#### **4.14.1.4. What's New**

#### **4.14.1.5. Getting Started**

- Please ensure that you have setup the pricing scheme in "Doc Item Maintenace applet", you are going to need to use the pricing scheme when configuring the Virtual Branch
- Create a virtual branch for CP Commerce
  - Goto the "Organization Applet" to create a virtual branch

- Create a CP Commerce Website
  - Goto the CP Commerce Admin Applet, and then click "+" to create a website.
  - You may refer to the CP Commerce Admin Applet user guide for more details.
  - When
- Setting up Hostname
  - For configuration of hostname.
  - MIS Department can help you to configure the hostname Currently, Tuan (our programmer) is working on a feature where the platform sysadmin applet, will provide the feature for users to just click and power up the hostname.
  - What is a hostname?? Every website has a hostname... for example: <https://www.wavelet.net> <https://www.wavelet.net/contact-us> (this is a URL, the hostname part is only www.wavelet.net, the https:// is the protocol, and the "contact-us" is the "url path")

#### **4.14.1.6. Module Dependencies**

### **4.14.2. CP Commerce - Unique Value Proposition**

### **4.14.3. CP Commerce - Related Applets**

### **4.14.4. CP Commerce - Project Implementation Steps**

#### **4.14.4.1. Scope Management (End Results)**

*Begin with the end in mind*

- This is where we define the end results and priorities
- We decide what to do in phase 1, phase 2, phase 3 etc.
- This is where we create the WBS (Work Break Down) as well.

#### **4.14.4.2. Project Gantt Chart**

Although there are many project Gantt Chart software out there, in the past, we have used Smartsheet.com, Google spreadsheet and others. We found that the issue due dates and the actual progress of the issue status became outdated within days because everyone else in the team are NOT updating the issues in these Gantt Chart, they are using Jira issue tracker at <https://wavelet.atlassian.net>. As a results, we have decided to make use of the following <https://www.atlassian.com/software/jira/features/roadmaps>

- Defining Activities
  - List down all the activities involved for each [Work Breakdown](#)
- Sequence Activities
  - Which one first, which one next
- Estimated Resource Requirements for each activity

- Estimate how long it will take, what skills may be required to do this
- Schedule
  - Identify the activities dependency, and based on resource availability , developing a schedule
- Identify Critical Path
  - As many activities can happen in parallel , we need to identify the critical path to ensure the activities that are in critical path are given the highest urgency, to ensure the project is not delayed.

#### **4.14.4.3. Project Kickstart Meeting**

#### **4.14.4.4. Weekly Meeting**

#### **4.14.4.5. Agile Method**

#### **4.14.4.6. Cashflow Projection**

#### **4.14.4.7. Human Resource Management**

- Milestones and Rewards

#### **4.14.4.8. Communication Management**

#### **4.14.4.9. Risk Management**

- Identify third party dependency
- Identify backup plans
- Identify contingency plans

#### **4.14.4.10. UAT (User Acceptance Test)**

#### **4.14.4.11. Requirement Analysis**

#### **4.14.4.12. Project Goes Live**

#### **4.14.4.13. Post Mortem**

### **4.14.5. Work Breakdown**

#### **4.14.5.1. URL and Domain Name**

- Domain Name This can be top level domain name, or sub-domain name.
- BigLedger hostname

#### **4.14.5.2. UI Design**

- Both mobile and desktop

#### **4.14.5.3. Applet Installations**

- Applet Catalogs
- Applet installations via Applet Store

Please install the applet in the following modules:

- [Core Module Applets](#)
- [Membership Module Applets](#)
- [CP Commerce Applets](#)

#### **4.14.5.4. Products and Pricing**

Define a pricing scheme in the Doc Item Maintenance applet, and ensure all the product pricing is accurate.

Attach the categories and set of attributes to each of the product.

Upload the product images to cp-commerce

#### **4.14.5.5. CP Commerce Virtual Branch**

We need to create a virtual branch for every CP-Commerce website, refer to the Virtual Branch feature in Organization Applet accordingly.

#### **4.14.5.6. PGW Configurations**

Please visit [PGW Module](#) for more information about the configuration of PGW Module.

#### **4.14.5.7. Digital Signature**

#### **4.14.5.8. Post Registration Configuration**

#### **4.14.5.9. Third Party Authentication and Authorization**

#### **4.14.5.10. Google reCaptcha**

#### **4.14.5.11. Google Analytics**

#### **4.14.5.12. Review Settings**

#### **4.14.5.13. Menu List**

#### **4.14.5.14. Label List**

#### **4.14.5.15. Content Category**

#### **4.14.5.16. Static Posts**

- About us

- Privacy Policy
- Terms and conditions
- .... other content in a typical website

#### **4.14.5.17. Restricted Access By Entity Accounts**

#### **4.14.5.18. Layout Instance**

#### **4.14.5.19. Configuring Language, Region and Country**

#### **4.14.5.20. Voucher Management**

#### **4.14.5.21. Quality Control Checklist**

### **4.14.6. Product Maintenance**

- Basic Product
- Group Product (variants)
- Bundle Product
- Product Categories
- Product Dimensions / Volumetric
- Product Description Pages
- Product Images
- Product Reviews / Ratings \*

### **4.14.7. Shipping Fees**

- Shipping Fee Applets

### **4.14.8. Settlement Methods**

### **4.14.9. Order Fulfillment**

- We will talk about Sales Order Applet
- Delivery & Installation Applet
- Syncing to the EMP
- Choosing the serial numbers, printing of the Consignment Notes / stickers etc.

\*

### **4.14.10. Search Engine Optimization**

### **4.14.11. QC Checklist**

# **4.15. Procure to Pay Module**

## **4.15.1. Introduction**

The intention of this section in the documentation. What this section cover, and not covering... and how it will link to other other modules. Explaining that certain detail about

### **4.15.1.1. Overview**

Some background of why this module was developed Provide a summary of what this module does and doesn't do.

### **4.15.1.2. Applets**

### **4.15.1.3. Features and Functions**

### **4.15.1.4. What's New**

### **4.15.1.5. Getting Started**

### **4.15.1.6. Module Dependencies**

## **4.15.2. Procure To Pay - Unique Value Proposition**

## **4.15.3. Procure To Pay - Related Applets**

## **4.15.4. Procure To Pay - Project Implementation Steps**

### **4.15.4.1. Scope Management (End Results)**

*Begin with the end in mind*

- This is where we define the end results and priorities
- We decide what to do in phase 1, phase 2, phase 3 etc.
- This is where we create the WBS (Work Break Down) as well.

### **4.15.4.2. Project Gantt Chart**

- Defining Activities
  - List down all the activities involved for each work breakdown
- Sequence Activities
  - Which one first, which one next
- Estimated Resource Requirements for each activity
  - Estimate how long it will take, what skills may be required to do this
- Schedule

- Identify the activities dependency, and based on resource availability , developing a schedule
- Identify Critical Path

#### **4.15.4.3. Project Kickstart Meeting**

#### **4.15.4.4. Weekly Meeting**

#### **4.15.4.5. Agile Method**

#### **4.15.4.6. Cashflow Projection**

#### **4.15.4.7. Human Resource Management**

- Milestones and Rewards

#### **4.15.4.8. Communication Management**

#### **4.15.4.9. Risk Management**

- Identify third party dependency
- Identify backup plans
- Identify contingency plans

#### **4.15.4.10. UAT (User Acceptance Test)**

#### **4.15.4.11. Requirement Analysis**

#### **4.15.4.12. Project Goes Live**

#### **4.15.4.13. Post Mortem**

### **4.16. HR Module**

#### **4.16.1. Introduction**

### **4.17. Order To Cash Module**

#### **4.17.1. Introduction**

The intention of this section in the documentation. What this section cover, and not covering... and how it will link to othe other modules. Explaining that certain detail about

##### **4.17.1.1. Overview**

Some background of why this module was developed Provide a summary of what this module does and doesn't do.

#### **4.17.1.2. Applets**

#### **4.17.1.3. Features and Functions**

#### **4.17.1.4. What's New**

#### **4.17.1.5. Getting Started**

#### **4.17.1.6. Module Dependencies**

### **4.17.2. Order To Cash - Unique Value Proposition**

### **4.17.3. Order To Cash - Related Applets**

### **4.17.4. Order To Cash - Project Implementation Steps**

#### **4.17.4.1. Scope Management (End Results)**

*Begin with the end in mind*

- This is where we define the end results and priorities
- We decide what to do in phase 1, phase 2, phase 3 etc.
- This is where we create the WBS (Work Break Down) as well.

#### **4.17.4.2. Project Gantt Chart**

- Defining Activities
  - List down all the activities involved for each work breakdown
- Sequence Activities
  - Which one first, which one next
- Estimated Resource Requirements for each activity
  - Estimate how long it will take, what skills may be required to do this
- Schedule
  - Identify the activities dependency, and based on resource availability , developing a schedule
- Identify Critical Path

#### **4.17.4.3. Project Kickstart Meeting**

#### **4.17.4.4. Weekly Meeting**

#### **4.17.4.5. Agile Method**

#### **4.17.4.6. Cashflow Projection**

#### **4.17.4.7. Human Resource Management**

- Milestones and Rewards

#### **4.17.4.8. Communication Management**

#### **4.17.4.9. Risk Management**

- Identify third party dependency
- Identify backup plans
- Identify contingency plans

#### **4.17.4.10. UAT (User Acceptance Test)**

#### **4.17.4.11. Requirement Analysis**

#### **4.17.4.12. Project Goes Live**

#### **4.17.4.13. Post Mortem**

### **4.18. Warehouse Management Module**

#### **4.18.1. Introduction**

The intention of this section in the documentation. What this section cover, and not covering... and how it will link to othe other modules. Explaining that certain detail about

##### **4.18.1.1. Overview**

Some background of why this module was developed Provide a summary of what this module does and doesn't do.

##### **4.18.1.2. Applets**

##### **4.18.1.3. Features and Functions**

##### **4.18.1.4. What's New**

##### **4.18.1.5. Getting Started**

##### **4.18.1.6. Module Dependencies**

#### **4.18.2. Warehouse Management - Unique Value Proposition**

#### **4.18.3. Warehouse Management - Related Applets**

## **4.18.4. Warehouse Management - Project Implementation Steps**

### **4.18.4.1. Scope Management (End Results)**

*Begin with the end in mind*

- This is where we define the end results and priorities
- We decide what to do in phase 1, phase 2, phase 3 etc.
- This is where we create the WBS (Work Break Down) as well.

### **4.18.4.2. Project Gantt Chart**

- Defining Activities
  - List down all the activities involved for each work breakdown
- Sequence Activities
  - Which one first, which one next
- Estimated Resource Requirements for each activity
  - Estimate how long it will take, what skills may be required to do this
- Schedule
  - Identify the activities dependency, and based on resource availability , developing a schedule
- Identify Critical Path

### **4.18.4.3. Project Kickstart Meeting**

### **4.18.4.4. Weekly Meeting**

### **4.18.4.5. Agile Method**

### **4.18.4.6. Cashflow Projection**

### **4.18.4.7. Human Resource Management**

- Milestones and Rewards

### **4.18.4.8. Communication Management**

### **4.18.4.9. Risk Management**

- Identify third party dependency
- Identify backup plans
- Identify contingency plans

### **4.18.4.10. UAT (User Acceptance Test)**

#### **4.18.4.11. Requirement Analysis**

#### **4.18.4.12. Project Goes Live**

#### **4.18.4.13. Post Mortem**

## **4.19. Customer Data Platform**

### **4.19.1. Introduction**

The intention of this section in the documentation. What this section cover, and not covering... and how it will link to othe other modules. Explaining that certain detail about

#### **4.19.1.1. Overview**

Some background of why this module was developed Provide a summary of what this module does and doesn't do.

#### **4.19.1.2. Applets**

#### **4.19.1.3. Features and Functions**

#### **4.19.1.4. What's New**

#### **4.19.1.5. Getting Started**

#### **4.19.1.6. Module Dependencies**

### **4.19.2. Customer Data Platform - Unique Value Proposition**

### **4.19.3. Customer Data Platform - Related Applets**

### **4.19.4. Customer Data Platform - Project Implementation Steps**

#### **4.19.4.1. Scope Management (End Results)**

*Begin with the end in mind*

- This is where we define the end results and priorities
- We decide what to do in phase 1, phase 2, phase 3 etc.
- This is where we create the WBS (Work Break Down) as well.

#### **4.19.4.2. Project Gantt Chart**

- Defining Activities
  - List down all the activities involved for each work breakdown
- Sequence Activities

- Which one first, which one next
- Estimated Resource Requirements for each activity
  - Estimate how long it will take, what skills may be required to do this
- Schedule
  - Identify the activities dependency, and based on resource availability , developing a schedule
- Identify Critical Path

#### **4.19.4.3. Project Kickstart Meeting**

#### **4.19.4.4. Weekly Meeting**

#### **4.19.4.5. Agile Method**

#### **4.19.4.6. Cashflow Projection**

#### **4.19.4.7. Human Resource Management**

- Milestones and Rewards

#### **4.19.4.8. Communication Management**

#### **4.19.4.9. Risk Management**

- Identify third party dependency
- Identify backup plans
- Identify contingency plans

#### **4.19.4.10. UAT (User Acceptance Test)**

#### **4.19.4.11. Requirement Analysis**

#### **4.19.4.12. Project Goes Live**

#### **4.19.4.13. Post Mortem**

### **4.20. PGW Module**

#### **4.20.1. Introduction**

The intention of this section in the documentation. What this section cover, and not covering... and how it will link to othe other modules. Explaining that certain detail about

##### **4.20.1.1. PGW Overview**

Some background of why this module was developed Provide a summary of what this module does

and doesn't do.

#### **4.20.1.2. PGW Applets**

The pgw module consists of the following applets:

- [Section A.13, “Merchant Admin Maintenance Applet”](#)

#### **4.20.1.3. Features and Functions**

#### **4.20.1.4. What's New**

#### **4.20.1.5. Getting Started**

#### **4.20.1.6. Module Dependencies**

### **4.20.2. Payment Gateway Module - Unique Value Proposition**

#### **4.20.3. Module Name - Related Applets**

#### **4.20.4. Module Name - Project Implementation Steps**

##### **4.20.4.1. Scope Management (End Results)**

*Begin with the end in mind*

- This is where we define the end results and priorities
- We decide what to do in phase 1, phase 2, phase 3 etc.
- This is where we create the WBS (Work Break Down) as well.

##### **4.20.4.2. Project Gantt Chart**

- Defining Activities
  - List down all the activities involved for each work breakdown
- Sequence Activities
  - Which one first, which one next
- Estimated Resource Requirements for each activity
  - Estimate how long it will take, what skills may be required to do this
- Schedule
  - Identify the activities dependency, and based on resource availability , developing a schedule
- Identify Critical Path

##### **4.20.4.3. Project Kickstart Meeting**

#### **4.20.4.4. Weekly Meeting**

#### **4.20.4.5. Agile Method**

#### **4.20.4.6. Cashflow Projection**

#### **4.20.4.7. Human Resource Management**

- Milestones and Rewards

#### **4.20.4.8. Communication Management**

#### **4.20.4.9. Risk Management**

- Identify third party dependency
- Identify backup plans
- Identify contingency plans

#### **4.20.4.10. UAT (User Acceptance Test)**

#### **4.20.4.11. Requirement Analysis**

#### **4.20.4.12. Project Goes Live**

#### **4.20.4.13. Post Mortem**

### **4.21. Chatbot Module**

#### **4.21.1. Introduction**

The intention of this section in the documentation. What this section cover, and not covering... and how it will link to othe other modules. Explaining that certain detail about

##### **4.21.1.1. Overview**

Some background of why this module was developed Provide a summary of what this module does and doesn't do.

##### **4.21.1.2. Applets**

##### **4.21.1.3. Features and Functions**

##### **4.21.1.4. What's New**

##### **4.21.1.5. Getting Started**

##### **4.21.1.6. Module Dependencies**

### **4.21.2. Chatbot - Unique Value Proposition**

### **4.21.3. Chatbot - Related Applets**

### **4.21.4. Module Name - Project Implementation Steps**

#### **4.21.4.1. Scope Management (End Results)**

*Begin with the end in mind*

- This is where we define the end results and priorities
- We decide what to do in phase 1, phase 2, phase 3 etc.
- This is where we create the WBS (Work Break Down) as well.

#### **4.21.4.2. Project Gantt Chart**

- Defining Activities
  - List down all the activities involved for each work breakdown
- Sequence Activities
  - Which one first, which one next
- Estimated Resource Requirements for each activity
  - Estimate how long it will take, what skills may be required to do this
- Schedule
  - Identify the activities dependency, and based on resource availability , developing a schedule
- Identify Critical Path

#### **4.21.4.3. Project Kickstart Meeting**

#### **4.21.4.4. Weekly Meeting**

#### **4.21.4.5. Agile Method**

#### **4.21.4.6. Cashflow Projection**

#### **4.21.4.7. Human Resource Management**

- Milestones and Rewards

#### **4.21.4.8. Communication Management**

#### **4.21.4.9. Risk Management**

- Identify third party dependency
- Identify backup plans
- Identify contingency plans

#### **4.21.4.10. UAT (User Acceptance Test)**

#### **4.21.4.11. Requirement Analysis**

#### **4.21.4.12. Project Goes Live**

#### **4.21.4.13. Post Mortem**

## **4.22. Process Automation Module**

### **4.22.1. Introduction**

The intention of this section in the documentation. What this section cover, and not covering... and how it will link to othe other modules. Explaining that certain detail about

## **4.23. Datalake Module**

### **4.23.1. Introduction**

The intention of this section in the documentation. What this section cover, and not covering... and how it will link to othe other modules. Explaining that certain detail about

#### **4.23.1.1. Overview**

Some background of why this module was developed Provide a summary of what this module does and doesn't do.

#### **4.23.1.2. Applets**

#### **4.23.1.3. Features and Functions**

#### **4.23.1.4. What's New**

#### **4.23.1.5. Getting Started**

#### **4.23.1.6. Module Dependencies**

## **4.23.2. Datalake - Unique Value Proposition**

### **4.23.3. Datalake - Related Applets**

### **4.23.4. Datalake - Project Implementation Steps**

#### **4.23.4.1. Scope Management (End Results)**

*Begin with the end in mind*

- This is where we define the end results and priorities

- We decide what to do in phase 1, phase 2, phase 3 etc.
- This is where we create the WBS (Work Break Down) as well.

#### **4.23.4.2. Project Gantt Chart**

- Defining Activities
  - List down all the activities involved for each work breakdown
- Sequence Activities
  - Which one first, which one next
- Estimated Resource Requirements for each activity
  - Estimate how long it will take, what skills may be required to do this
- Schedule
  - Identify the activities dependency, and based on resource availability , developing a schedule
- Identify Critical Path

#### **4.23.4.3. Project Kickstart Meeting**

#### **4.23.4.4. Weekly Meeting**

#### **4.23.4.5. Agile Method**

#### **4.23.4.6. Cashflow Projection**

#### **4.23.4.7. Human Resource Management**

- Milestones and Rewards

#### **4.23.4.8. Communication Management**

#### **4.23.4.9. Risk Management**

- Identify third party dependency
- Identify backup plans
- Identify contingency plans

#### **4.23.4.10. UAT (User Acceptance Test)**

#### **4.23.4.11. Requirement Analysis**

#### **4.23.4.12. Project Goes Live**

#### **4.23.4.13. Post Mortem**

# Chapter 5. Technical Guide

This technical guide is used by both internal and external employees of

## 5.1. Applet Development Guide

### 5.1.1. Introduction

### 5.1.2. Creating a new Applet

There are many steps involved when you want to create a new applet, a well designed applet would have to follow our applet design guidelines.

#### Preparation Before Developing A New Applet

##### 5.1.2.1. Business Requirements

##### 5.1.2.2. Database Design

##### 5.1.2.3. Mock Up and Design

##### 5.1.2.4. API Design

### 5.1.3. Deploying applet to s3

- Making pull request the github vendor repository
- Platform SysAdmin to merge the changes from vendor repository to the global applet repository, and then syncing it to various branches : production, staging , development. Subsequently, these changes to be sync to the s3 bucket in AWS
- Submission for testing

### 5.1.4. Developer SysAdmin Applet

This applet is used by the Platform System Administrator to configure various applets

### 5.1.5. Example Applet Template

This guide provide a walk thru of the example applet so that the applet developers can cut short the learning time required to produce an applet from scratch.

### 5.1.6. Inactive Applet

An inactive applet is taken out from the applet store, but they are NOT deleted from the system yet.

The developer can still see this applet in their applet listing.

## **5.1.7. Publishing an Applet**

- Logo design
- Applet Description
- Applet images (for Applet Store)
- Pricing Country
- Applet Type
- Quality Checking
- Security Checking \*

## **5.1.8. Releasing new version of the applets**

### **5.1.8.1. Handling changes in permission templates**

### **5.1.8.2. Getting approval**

## **5.1.9. Full Deletion of Applet**

### **5.1.9.1. Removal of applet from Applet-Catalogs**

### **5.1.9.2. Removal of applet from users who have installed the applet**

### **5.1.9.3. Removal of the Javascript Bundle from s3**

### **5.1.9.4. Delete all applet settings / configurations in bl\_applet\_\* tables in both Tenant and Root**

- This would include Permission Templates / Permission Sets etc.

### **5.1.9.5. Removal of all schedulers related to this applet**

### **5.1.9.6. Removal of Audit Trails and other applet related tables**

### **5.1.9.7. Removal of applet from the Applet Master List - Google Spreadsheet**

### **5.1.9.8. Removal of other links related to applets**

## **5.1.10. Quality Control Checklist**

In order to ensure the best user experience on the Akaun Platform, we need to ensure this checklist is executed on a periodic basis.

### **5.1.10.1. UI Design QC**

### **5.1.10.2. Documentation QC**

### **5.1.10.3. Permissions QC**

#### **5.1.10.4. Features QC**

#### **5.1.10.5. Development / Staging Environment QC**

#### **5.1.10.6. Commercials QC**

#### **5.1.10.7. Source Code QC**

### **5.1.11. Support and Maintenance of Applet**

### **5.1.12. Suspension of Applet**

- Usually this happens when the developer / applet violates the policy of applet store etc.

### **5.1.13. Types of Applet**

### **5.1.14. UI Design Guidelines**

- Must have Applet settings at the bottom left
- Having Personal Settings at the bottom left
- Showing the Tenant-code at the top left
- Showing the applet logo at the top left
- Having left menu
- Responsive to both desktop and mobile

### **5.1.15. Vendor Account**

#### **5.1.15.1. Vendor Registration**

#### **5.1.15.2. Developer Registration**

#### **5.1.15.3. Linking to the AkaunHQ Entity Account**

### **5.1.16. Applet Permission Template**

understanding of permission / assignee / target type table.

understanding of difference between permission set and permission template

requesting for the permission template to be created for third party developer..

### **5.1.17. Pricing for applets**

For now, we go with simplified pricing strategy by just charging per user per applet per month manually before the Billing Engine is ready.

## **5.1.18. Scheduler for applet**

The scheduler of an applet allow recurring task to be executed on a periodic basis.

## **5.1.19. Webhooks for Applets**

The webhook for an applet is different from the webhook for Sales Order etc...

This webhook is specific to an applet, to cater for the following scenario... For example, when the users first installed an applet, or when they first start clicking on the applet... etc..

## **5.1.20. Archiving an Applet**

Archiving an applet would be permanently in-activating an applet.

## **5.1.21. Client Side Settings**

- This is used for certain client side permissions to hide certain fields in the UI
- Allowing users to configure customize the behavior of the client-side

# **5.2. ETL Guide**

## **5.2.1. Introduction**

# **5.3. Cloud Native Architecture**

## **5.3.1. Introduction**

Common misunderstanding \* thinking web based == cloud based. \* everything has A.I. \* online / networked == cloud based

Our aspirations \* To be the business operating systems

### **5.3.1.1. Background**

- Outdated JBoss application server, EJB 1.0 / 2.0
- Servers idling
- Hackers attack
- Certain minimum costs to power up a tenant
- Self service
- Internal employee users vs customers + suppliers
- Integration pains

### **5.3.1.2. Motivation**

Platform Business Model

Multiple offerings → as middleware - backend as a service → as applets → as SaaS → as communication hub

Cross Platform development

Scalability

Flexibility

Growth

Composable Enterprise

Utility based billing

### **5.3.1.3. Integrations**

spikes in loads

### **5.3.1.4. Infrastructure and Toolchain**

Various tools ready to be used out of the box... example : OCR, Lambda, RDS, NoSQL, API Gateway

### **5.3.1.5. Network Effect**

### **5.3.1.6. Cloud Cost Savings**

### **5.3.1.7. Artificial Intelligence**

### **5.3.1.8. Human Resource**

### **5.3.1.9. Journey**

### **5.3.1.10. Challenges and Lessons**

### **5.3.1.11. Technical Considerations**

- managing complexities
- Sharing about our journey to transform from monolith architecture to cloud native architecture
- Sharing about the problems and challenges implementing stateless applications
- Sharing about the implementation of Micro-Frontend Architecture
- Sharing about the implementation of Web Socket using API Gateway and DynamoDB
- Sharing about challenges of securing the API, permissions / configurations etc
- Sharing about the challenges of multi-tenant environments
- Sharing about the design of composable enterprise architecture

- Sharing about the tricky part of networked tenants

# Glossary

## Akaun Shell

The user interface that loads into a web browser, and showing users a list of applets.

## Applet

An application that runs on the Akaun Shell.

## Applet Store

The applet where users can discover other applets and install these other applets.

## Environment

There are 3 environments, namely production, staging and development. Each of these environments lives in a different AWS account.

## Platform Administrators

This refers to the BigLedger MIS Department.

## System Administrator

This refers to the BigLedger MIS Department.

## Root Database

This refers to the Platform main and global database.

## Tenant

Every tenant is isolated from each other , it has its own independent database and other resources like files storage. Within a tenant, it is possible to create multiple companies, and they share the same database.

## Tenant Admin

This refers to the OWNER or ADMIN of the Tenant.

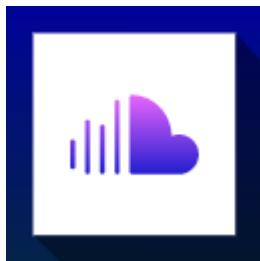
# Appendix A: Applet Directory

## A.1. Applet Listing

### A.1.1. Introduction

## A.2. Applet Store

### A.2.1. Introduction



This is the default applet that every user will get when they sign up to the Akaun Platform. Users can open this applet to install all other applets.

### A.2.2. Modules

This applet is used in the following modules:

- [Section 4.2, “Core Module”](#)
- [Section 4.3, “Accounting Module”](#)
- [Section 4.4, “Inventory Module”](#)
- [Section 4.5, “Point of Sales Module”](#)
- [Section 4.6, “Manufacturing Module”](#)
- [Section 4.7, “Membership Module”](#)
- [Section 4.8, “Referral Module”](#)
- [Section 4.9, “Customer Relationship Management”](#)
- [Section 4.10, “Contact Center Module”](#)
- [Section 4.11, “Digital Marketing Module”](#)
- [Section 4.12, “Marketplace Connector Module”](#)
- [Section 4.13, “Delivery Fulfillment Module”](#)
- [Section 4.14, “CP Commerce Module”](#)
- [Section 4.15, “Procure to Pay Module”](#)
- [Section 4.16, “HR Module”](#)
- [Section 4.17, “Order To Cash Module”](#)

- [Section 4.18, “Warehouse Management Module”](#)
- [Section 4.19, “Customer Data Platform”](#)
- [Section 4.20, “PGW Module”](#)
- [Section 4.21, “Chatbot Module”](#)
- [Section 4.22, “Process Automation Module”](#)
- [Section 4.23, “Datalake Module”](#)

### A.2.3. Menu 01 - e.g. Sales Orders Listing

### A.2.4. Menu 02 - e.g. Line Items

### A.2.5. Permission Settings

### A.2.6. Personalization

### A.2.7. Related Applets

This applet also depends on the following applets:

- Applet 1
- Applet 2

The following applets depends on this applet:

- Applet 3
- Applet 4

Also see

### A.2.8. Pricing

### A.2.9. Release Note

### A.2.10. Roadmap

## A.3. Bank Reconciliation Applet

### A.3.1. Introduction



This is a simple description of the applet, no more than 100 words.

#### A.3.1.1. Resources

- Discussion on the secret behind Auto Matching using artificial intelligence in the Bank Reconciliation applet  
[Discussion 1](#)  
[Discussion 2](#)

#### A.3.2. Modules

This applet is used in the following modules:

- [Section 4.2, “Core Module”](#)
- [Section 4.3, “Accounting Module”](#)
- [Section 4.4, “Inventory Module”](#)
- [Section 4.5, “Point of Sales Module”](#)
- [Section 4.6, “Manufacturing Module”](#)
- [Section 4.7, “Membership Module”](#)
- [Section 4.8, “Referral Module”](#)
- [Section 4.9, “Customer Relationship Management”](#)
- [Section 4.10, “Contact Center Module”](#)
- [Section 4.11, “Digital Marketing Module”](#)
- [Section 4.12, “Marketplace Connector Module”](#)
- [Section 4.13, “Delivery Fulfillment Module”](#)
- [Section 4.14, “CP Commerce Module”](#)
- [Section 4.15, “Procure to Pay Module”](#)
- [Section 4.16, “HR Module”](#)
- [Section 4.17, “Order To Cash Module”](#)

- [Section 4.18, “Warehouse Management Module”](#)
- [Section 4.19, “Customer Data Platform”](#)
- [Section 4.20, “PGW Module”](#)
- [Section 4.21, “Chatbot Module”](#)
- [Section 4.22, “Process Automation Module”](#)
- [Section 4.23, “Datalake Module”](#)

### A.3.3. Menu 01 - e.g. Sales Orders Listing

### A.3.4. Menu 02 - e.g. Line Items

### A.3.5. Permission Settings

### A.3.6. Personalization

### A.3.7. Related Applets

This applet also depends on the following applets:

- Applet 1
- Applet 2

The following applets depends on this applet:

- Applet 3
- Applet 4

Also see

### A.3.8. Pricing

### A.3.9. Release Note

### A.3.10. Roadmap

## A.4. Cashbook Applet

### A.4.1. Introduction



This is a simple description of the applet, no more than 100 words.

#### A.4.2. Modules

This applet is used in the following modules:

- [Section 4.2, “Core Module”](#)
- [Section 4.3, “Accounting Module”](#)
- [Section 4.4, “Inventory Module”](#)
- [Section 4.5, “Point of Sales Module”](#)
- [Section 4.6, “Manufacturing Module”](#)
- [Section 4.7, “Membership Module”](#)
- [Section 4.8, “Referral Module”](#)
- [Section 4.9, “Customer Relationship Management”](#)
- [Section 4.10, “Contact Center Module”](#)
- [Section 4.11, “Digital Marketing Module”](#)
- [Section 4.12, “Marketplace Connector Module”](#)
- [Section 4.13, “Delivery Fulfillment Module”](#)
- [Section 4.14, “CP Commerce Module”](#)
- [Section 4.15, “Procure to Pay Module”](#)
- [Section 4.16, “HR Module”](#)
- [Section 4.17, “Order To Cash Module”](#)
- [Section 4.18, “Warehouse Management Module”](#)
- [Section 4.19, “Customer Data Platform”](#)
- [Section 4.20, “PGW Module”](#)
- [Section 4.21, “Chatbot Module”](#)
- [Section 4.22, “Process Automation Module”](#)
- [Section 4.23, “Datalake Module”](#)

#### **A.4.3. Menu 01 - e.g. Sales Orders Listing**

#### **A.4.4. Menu 02 - e.g. Line Items**

#### **A.4.5. Permission Settings**

#### **A.4.6. Personalization**

#### **A.4.7. Related Applets**

This applet also depends on the following applets:

- Applet 1
- Applet 2

The following applets depends on this applet:

- Applet 3
- Applet 4

Also see

#### **A.4.8. Pricing**

#### **A.4.9. Release Note**

#### **A.4.10. Roadmap**

### **A.5. Chart of Account Applet**

#### **A.5.1. Introduction**



This is a simple description of the applet, no more than 100 words.

## A.5.2. Modules

This applet is used in the following modules:

- Section 4.2, “Core Module”
- Section 4.3, “Accounting Module”
- Section 4.4, “Inventory Module”
- Section 4.5, “Point of Sales Module”
- Section 4.6, “Manufacturing Module”
- Section 4.7, “Membership Module”
- Section 4.8, “Referral Module”
- Section 4.9, “Customer Relationship Management”
- Section 4.10, “Contact Center Module”
- Section 4.11, “Digital Marketing Module”
- Section 4.12, “Marketplace Connector Module”
- Section 4.13, “Delivery Fulfillment Module”
- Section 4.14, “CP Commerce Module”
- Section 4.15, “Procure to Pay Module”
- Section 4.16, “HR Module”
- Section 4.17, “Order To Cash Module”
- Section 4.18, “Warehouse Management Module”
- Section 4.19, “Customer Data Platform”
- Section 4.20, “PGW Module”
- Section 4.21, “Chatbot Module”
- Section 4.22, “Process Automation Module”
- Section 4.23, “Datalake Module”

## A.5.3. Menu 01 - e.g. Sales Orders Listing

## A.5.4. Menu 02 - e.g. Line Items

## A.5.5. Permission Settings

## A.5.6. Personalization

## A.5.7. Related Applets

This applet also depends on the following applets:

- Applet 1

- Applet 2

The following applets depends on this applet:

- Applet 3
- Applet 4

Also see

### A.5.8. Pricing

### A.5.9. Release Note

### A.5.10. Roadmap

## A.6. CP Commerce Admin Applet

### A.6.1. Introduction



This is a simple description of the applet, no more than 100 words.

### A.6.2. Modules

This applet is used in the following modules:

- [Section 4.2, “Core Module”](#)
- [Section 4.3, “Accounting Module”](#)
- [Section 4.4, “Inventory Module”](#)
- [Section 4.5, “Point of Sales Module”](#)
- [Section 4.6, “Manufacturing Module”](#)
- [Section 4.7, “Membership Module”](#)
- [Section 4.8, “Referral Module”](#)
- [Section 4.9, “Customer Relationship Management”](#)

- [Section 4.10, “Contact Center Module”](#)
- [Section 4.11, “Digital Marketing Module”](#)
- [Section 4.12, “Marketplace Connector Module”](#)
- [Section 4.13, “Delivery Fulfillment Module”](#)
- [Section 4.14, “CP Commerce Module”](#)
- [Section 4.15, “Procure to Pay Module”](#)
- [Section 4.16, “HR Module”](#)
- [Section 4.17, “Order To Cash Module”](#)
- [Section 4.18, “Warehouse Management Module”](#)
- [Section 4.19, “Customer Data Platform”](#)
- [Section 4.20, “PGW Module”](#)
- [Section 4.21, “Chatbot Module”](#)
- [Section 4.22, “Process Automation Module”](#)
- [Section 4.23, “Datalake Module”](#)

### A.6.3. Websites

### A.6.4. Forms

### A.6.5. Topics

### A.6.6. Rating Configuration

### A.6.7. Template Forms

### A.6.8. Submitted Forms

### A.6.9. Spending Limit

### A.6.10. Blocked Customers

### A.6.11. Activities

### A.6.12. Permission Settings

### A.6.13. Personalization

### A.6.14. Related Applets

This applet also depends on the following applets:

- Applet 1

- Applet 2

The following applets depends on this applet:

- Applet 3
- Applet 4

Also see

### A.6.15. Pricing

### A.6.16. Release Note

### A.6.17. Roadmap

## A.7. Customer Maintenance Applet

### A.7.1. Introduction



This is a simple description of the applet, no more than 100 words.

### A.7.2. Modules

This applet is used in the following modules:

- [Section 4.2, “Core Module”](#)
- [Section 4.3, “Accounting Module”](#)
- [Section 4.4, “Inventory Module”](#)
- [Section 4.5, “Point of Sales Module”](#)
- [Section 4.6, “Manufacturing Module”](#)
- [Section 4.7, “Membership Module”](#)
- [Section 4.8, “Referral Module”](#)
- [Section 4.9, “Customer Relationship Management”](#)

- [Section 4.10, “Contact Center Module”](#)
- [Section 4.11, “Digital Marketing Module”](#)
- [Section 4.12, “Marketplace Connector Module”](#)
- [Section 4.13, “Delivery Fulfillment Module”](#)
- [Section 4.14, “CP Commerce Module”](#)
- [Section 4.15, “Procure to Pay Module”](#)
- [Section 4.16, “HR Module”](#)
- [Section 4.17, “Order To Cash Module”](#)
- [Section 4.18, “Warehouse Management Module”](#)
- [Section 4.19, “Customer Data Platform”](#)
- [Section 4.20, “PGW Module”](#)
- [Section 4.21, “Chatbot Module”](#)
- [Section 4.22, “Process Automation Module”](#)
- [Section 4.23, “Datalake Module”](#)

### **A.7.3. Menu 01 - e.g. Sales Orders Listing**

### **A.7.4. Menu 02 - e.g. Line Items**

### **A.7.5. Permission Settings**

### **A.7.6. Personalization**

### **A.7.7. Related Applets**

This applet also depends on the following applets:

- Applet 1
- Applet 2

The following applets depends on this applet:

- Applet 3
- Applet 4

Also see

### **A.7.8. Pricing**

### **A.7.9. Release Note**

### **A.7.10. Roadmap**

## A.8. Doc Item Maintenance Applet

### A.8.1. Introduction



This is a simple description of the applet, no more than 100 words.

### A.8.2. Modules

This applet is used in the following modules:

- [Section 4.2, “Core Module”](#)
- [Section 4.3, “Accounting Module”](#)
- [Section 4.4, “Inventory Module”](#)
- [Section 4.5, “Point of Sales Module”](#)
- [Section 4.6, “Manufacturing Module”](#)
- [Section 4.7, “Membership Module”](#)
- [Section 4.8, “Referral Module”](#)
- [Section 4.9, “Customer Relationship Management”](#)
- [Section 4.10, “Contact Center Module”](#)
- [Section 4.11, “Digital Marketing Module”](#)
- [Section 4.12, “Marketplace Connector Module”](#)
- [Section 4.13, “Delivery Fulfillment Module”](#)
- [Section 4.14, “CP Commerce Module”](#)
- [Section 4.15, “Procure to Pay Module”](#)
- [Section 4.16, “HR Module”](#)
- [Section 4.17, “Order To Cash Module”](#)
- [Section 4.18, “Warehouse Management Module”](#)
- [Section 4.19, “Customer Data Platform”](#)
- [Section 4.20, “PGW Module”](#)

- [Section 4.21, “Chatbot Module”](#)
- [Section 4.22, “Process Automation Module”](#)
- [Section 4.23, “Datalake Module”](#)

### A.8.3. Menu 01 - e.g. Sales Orders Listing

### A.8.4. Menu 02 - e.g. Line Items

### A.8.5. Permission Settings

### A.8.6. Personalization

### A.8.7. Related Applets

This applet also depends on the following applets:

- Applet 1
- Applet 2

The following applets depends on this applet:

- Applet 3
- Applet 4

Also see

### A.8.8. Pricing

### A.8.9. Release Note

### A.8.10. Roadmap

## A.9. Employee Maintenance Applet

### A.9.1. Introduction



This is a simple description of the applet, no more than 100 words.

### A.9.2. Modules

This applet is used in the following modules:

- Section 4.2, “Core Module”
- Section 4.3, “Accounting Module”
- Section 4.4, “Inventory Module”
- Section 4.5, “Point of Sales Module”
- Section 4.6, “Manufacturing Module”
- Section 4.7, “Membership Module”
- Section 4.8, “Referral Module”
- Section 4.9, “Customer Relationship Management”
- Section 4.10, “Contact Center Module”
- Section 4.11, “Digital Marketing Module”
- Section 4.12, “Marketplace Connector Module”
- Section 4.13, “Delivery Fulfillment Module”
- Section 4.14, “CP Commerce Module”
- Section 4.15, “Procure to Pay Module”
- Section 4.16, “HR Module”
- Section 4.17, “Order To Cash Module”
- Section 4.18, “Warehouse Management Module”
- Section 4.19, “Customer Data Platform”
- Section 4.20, “PGW Module”
- Section 4.21, “Chatbot Module”
- Section 4.22, “Process Automation Module”
- Section 4.23, “Datalake Module”

### **A.9.3. Menu 01 - e.g. Sales Orders Listing**

### **A.9.4. Menu 02 - e.g. Line Items**

### **A.9.5. Permission Settings**

### **A.9.6. Personalization**

### **A.9.7. Related Applets**

This applet also depends on the following applets:

- Applet 1
- Applet 2

The following applets depends on this applet:

- Applet 3
- Applet 4

Also see

### **A.9.8. Pricing**

### **A.9.9. Release Note**

### **A.9.10. Roadmap**

## **A.10. Entity Maintenance Applet**

### **A.10.1. Introduction**



This is a simple description of the applet, no more than 100 words.

## A.10.2. Modules

This applet is used in the following modules:

- [Section 4.2, “Core Module”](#)
- [Section 4.3, “Accounting Module”](#)
- [Section 4.4, “Inventory Module”](#)
- [Section 4.5, “Point of Sales Module”](#)
- [Section 4.6, “Manufacturing Module”](#)
- [Section 4.7, “Membership Module”](#)
- [Section 4.8, “Referral Module”](#)
- [Section 4.9, “Customer Relationship Management”](#)
- [Section 4.10, “Contact Center Module”](#)
- [Section 4.11, “Digital Marketing Module”](#)
- [Section 4.12, “Marketplace Connector Module”](#)
- [Section 4.13, “Delivery Fulfillment Module”](#)
- [Section 4.14, “CP Commerce Module”](#)
- [Section 4.15, “Procure to Pay Module”](#)
- [Section 4.16, “HR Module”](#)
- [Section 4.17, “Order To Cash Module”](#)
- [Section 4.18, “Warehouse Management Module”](#)
- [Section 4.19, “Customer Data Platform”](#)
- [Section 4.20, “PGW Module”](#)
- [Section 4.21, “Chatbot Module”](#)
- [Section 4.22, “Process Automation Module”](#)
- [Section 4.23, “Datalake Module”](#)

## A.10.3. Menu 01 - e.g. Sales Orders Listing

## A.10.4. Menu 02 - e.g. Line Items

## A.10.5. Permission Settings

## A.10.6. Personalization

## A.10.7. Related Applets

This applet also depends on the following applets:

- Applet 1

- Applet 2

The following applets depends on this applet:

- Applet 3
- Applet 4

Also see

### A.10.8. Pricing

### A.10.9. Release Note

### A.10.10. Roadmap

## A.11. Inventory Item Maintenance Applet

### A.11.1. Introduction



This is a simple description of the applet, no more than 100 words.

### A.11.2. Modules

This applet is used in the following modules:

- [Section 4.2, “Core Module”](#)
- [Section 4.3, “Accounting Module”](#)
- [Section 4.4, “Inventory Module”](#)
- [Section 4.5, “Point of Sales Module”](#)
- [Section 4.6, “Manufacturing Module”](#)
- [Section 4.7, “Membership Module”](#)
- [Section 4.8, “Referral Module”](#)
- [Section 4.9, “Customer Relationship Management”](#)

- [Section 4.10, “Contact Center Module”](#)
- [Section 4.11, “Digital Marketing Module”](#)
- [Section 4.12, “Marketplace Connector Module”](#)
- [Section 4.13, “Delivery Fulfillment Module”](#)
- [Section 4.14, “CP Commerce Module”](#)
- [Section 4.15, “Procure to Pay Module”](#)
- [Section 4.16, “HR Module”](#)
- [Section 4.17, “Order To Cash Module”](#)
- [Section 4.18, “Warehouse Management Module”](#)
- [Section 4.19, “Customer Data Platform”](#)
- [Section 4.20, “PGW Module”](#)
- [Section 4.21, “Chatbot Module”](#)
- [Section 4.22, “Process Automation Module”](#)
- [Section 4.23, “Datalake Module”](#)

### **A.11.3. Menu 01 - e.g. Sales Orders Listing**

### **A.11.4. Menu 02 - e.g. Line Items**

### **A.11.5. Permission Settings**

### **A.11.6. Personalization**

### **A.11.7. Related Applets**

This applet also depends on the following applets:

- Applet 1
- Applet 2

The following applets depends on this applet:

- Applet 3
- Applet 4

Also see

### **A.11.8. Pricing**

### **A.11.9. Release Note**

### **A.11.10. Roadmap**

## A.12. Media Library Applet

### A.12.1. Introduction



This is a simple description of the applet, no more than 100 words.

### A.12.2. Modules

This applet is used in the following modules:

- [Section 4.2, “Core Module”](#)
- [Section 4.3, “Accounting Module”](#)
- [Section 4.4, “Inventory Module”](#)
- [Section 4.5, “Point of Sales Module”](#)
- [Section 4.6, “Manufacturing Module”](#)
- [Section 4.7, “Membership Module”](#)
- [Section 4.8, “Referral Module”](#)
- [Section 4.9, “Customer Relationship Management”](#)
- [Section 4.10, “Contact Center Module”](#)
- [Section 4.11, “Digital Marketing Module”](#)
- [Section 4.12, “Marketplace Connector Module”](#)
- [Section 4.13, “Delivery Fulfillment Module”](#)
- [Section 4.14, “CP Commerce Module”](#)
- [Section 4.15, “Procure to Pay Module”](#)
- [Section 4.16, “HR Module”](#)
- [Section 4.17, “Order To Cash Module”](#)
- [Section 4.18, “Warehouse Management Module”](#)
- [Section 4.19, “Customer Data Platform”](#)
- [Section 4.20, “PGW Module”](#)

- [Section 4.21, “Chatbot Module”](#)
- [Section 4.22, “Process Automation Module”](#)
- [Section 4.23, “Datalake Module”](#)

### A.12.3. Menu 01 - e.g. Sales Orders Listing

### A.12.4. Menu 02 - e.g. Line Items

### A.12.5. Permission Settings

### A.12.6. Personalization

### A.12.7. Related Applets

This applet also depends on the following applets:

- Applet 1
- Applet 2

The following applets depends on this applet:

- Applet 3
- Applet 4

Also see

### A.12.8. Pricing

### A.12.9. Release Note

### A.12.10. Roadmap

## A.13. Merchant Admin Maintenance Applet

### A.13.1. Introduction



*Designed by [pngtree](#)*

This is a simple description of the applet, no more than 100 words.

### A.13.2. Modules

This applet is used in the following modules:

- Section 4.2, “Core Module”
- Section 4.3, “Accounting Module”
- Section 4.4, “Inventory Module”
- Section 4.5, “Point of Sales Module”
- Section 4.6, “Manufacturing Module”
- Section 4.7, “Membership Module”
- Section 4.8, “Referral Module”

- Section 4.9, “Customer Relationship Management”
- Section 4.10, “Contact Center Module”
- Section 4.11, “Digital Marketing Module”
- Section 4.12, “Marketplace Connector Module”
- Section 4.13, “Delivery Fulfillment Module”
- Section 4.14, “CP Commerce Module”
- Section 4.15, “Procure to Pay Module”
- Section 4.16, “HR Module”
- Section 4.17, “Order To Cash Module”
- Section 4.18, “Warehouse Management Module”
- Section 4.19, “Customer Data Platform”
- Section 4.20, “PGW Module”
- Section 4.21, “Chatbot Module”
- Section 4.22, “Process Automation Module”
- Section 4.23, “Datalake Module”

### A.13.3. Menu 01 - e.g. Sales Orders Listing

### A.13.4. Menu 02 - e.g. Line Items

### A.13.5. Permission Settings

### A.13.6. Personalization

### A.13.7. Related Applets

This applet also depends on the following applets:

- Applet 1
- Applet 2

The following applets depends on this applet:

- Applet 3
- Applet 4

Also see

### A.13.8. Pricing

### A.13.9. Release Note

## A.13.10. Roadmap

# A.14. Organization Applet

## A.14.1. Introduction



You can use this applet to create / update / delete companies, branches and locations.

## A.14.2. Modules

This applet is used in the following modules:

- [Section 4.2, “Core Module”](#)
- [Section 4.3, “Accounting Module”](#)
- [Section 4.4, “Inventory Module”](#)
- [Section 4.5, “Point of Sales Module”](#)
- [Section 4.6, “Manufacturing Module”](#)
- [Section 4.7, “Membership Module”](#)
- [Section 4.8, “Referral Module”](#)
- [Section 4.9, “Customer Relationship Management”](#)
- [Section 4.10, “Contact Center Module”](#)
- [Section 4.11, “Digital Marketing Module”](#)
- [Section 4.12, “Marketplace Connector Module”](#)
- [Section 4.13, “Delivery Fulfillment Module”](#)
- [Section 4.14, “CP Commerce Module”](#)
- [Section 4.15, “Procure to Pay Module”](#)
- [Section 4.16, “HR Module”](#)
- [Section 4.17, “Order To Cash Module”](#)
- [Section 4.18, “Warehouse Management Module”](#)
- [Section 4.19, “Customer Data Platform”](#)
- [Section 4.20, “PGW Module”](#)
- [Section 4.21, “Chatbot Module”](#)
- [Section 4.22, “Process Automation Module”](#)

- [Section 4.23, “Datalake Module”](#)

### A.14.3. Menu 01 - e.g. Sales Orders Listing

### A.14.4. Menu 02 - e.g. Line Items

### A.14.5. Permission Settings

### A.14.6. Personalization

### A.14.7. Related Applets

This applet also depends on the following applets:

- Applet 1
- Applet 2

The following applets depends on this applet:

- Applet 3
- Applet 4

Also see

### A.14.8. Pricing

### A.14.9. Release Note

### A.14.10. Roadmap

## A.15. Payment Channel Applet

### A.15.1. Introduction



This is a simple description of the applet, no more than 100 words.

## A.15.2. Modules

This applet is used in the following modules:

- Section 4.2, “Core Module”
- Section 4.3, “Accounting Module”
- Section 4.4, “Inventory Module”
- Section 4.5, “Point of Sales Module”
- Section 4.6, “Manufacturing Module”
- Section 4.7, “Membership Module”
- Section 4.8, “Referral Module”
- Section 4.9, “Customer Relationship Management”
- Section 4.10, “Contact Center Module”
- Section 4.11, “Digital Marketing Module”
- Section 4.12, “Marketplace Connector Module”
- Section 4.13, “Delivery Fulfillment Module”
- Section 4.14, “CP Commerce Module”
- Section 4.15, “Procure to Pay Module”
- Section 4.16, “HR Module”
- Section 4.17, “Order To Cash Module”
- Section 4.18, “Warehouse Management Module”
- Section 4.19, “Customer Data Platform”
- Section 4.20, “PGW Module”
- Section 4.21, “Chatbot Module”
- Section 4.22, “Process Automation Module”
- Section 4.23, “Datalake Module”

## A.15.3. Menu 01 - e.g. Sales Orders Listing

## A.15.4. Menu 02 - e.g. Line Items

## A.15.5. Permission Settings

## A.15.6. Personalization

## A.15.7. Related Applets

This applet also depends on the following applets:

- Applet 1

- Applet 2

The following applets depends on this applet:

- Applet 3
- Applet 4

Also see

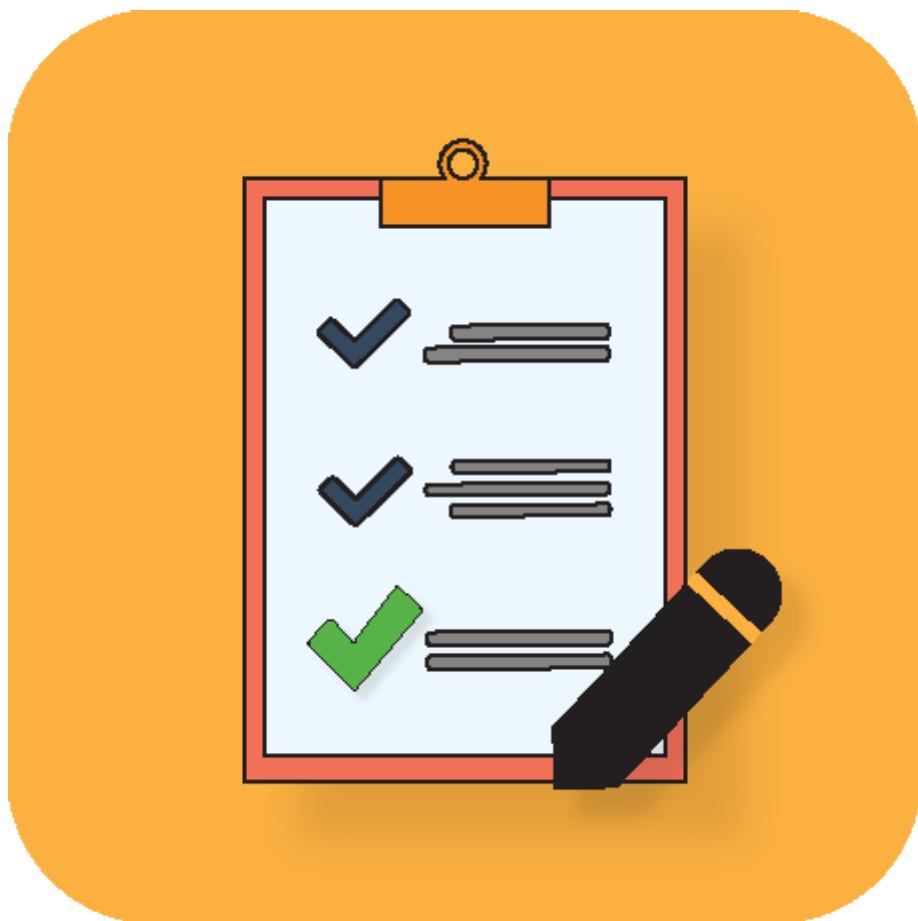
### A.15.8. Pricing

### A.15.9. Release Note

### A.15.10. Roadmap

## A.16. Stock Take V2 Applet

### A.16.1. Introduction



Stock Take Applet is an applet that designed to keep track of your items based on their locations, reference number or any other reference related to the Stock take count in hand. Stock Take Applet can compare your physical stock in hand with EMP system which identify variance of each stock. Stock Take Applet also allows you to track stock count records by user and specially assigned each item to each user. Therefore, it will reduce human error and streamline business operations efficiently.

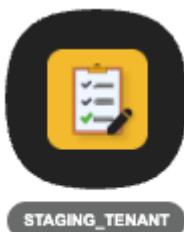
## A.16.2. Modules

This applet is used in the following modules:

- Section 4.2, “Core Module”
- Section 4.3, “Accounting Module”
- Section 4.4, “Inventory Module”
- Section 4.5, “Point of Sales Module”
- Section 4.6, “Manufacturing Module”
- Section 4.7, “Membership Module”
- Section 4.8, “Referral Module”
- Section 4.9, “Customer Relationship Management”
- Section 4.10, “Contact Center Module”
- Section 4.11, “Digital Marketing Module”
- Section 4.12, “Marketplace Connector Module”
- Section 4.13, “Delivery Fulfillment Module”
- Section 4.14, “CP Commerce Module”
- Section 4.15, “Procure to Pay Module”
- Section 4.16, “HR Module”
- Section 4.17, “Order To Cash Module”
- Section 4.18, “Warehouse Management Module”
- Section 4.19, “Customer Data Platform”
- Section 4.20, “PGW Module”
- Section 4.21, “Chatbot Module”
- Section 4.22, “Process Automation Module”
- Section 4.23, “Datalake Module”

## A.16.3. Menu 01 - Stock Take Session

1.1 Please go to Akaun.com - Stock Take Applet V2



Stock Take V2

1.2 Go to the Stock Take Session

**Session Listing**

No.	Session Name	Session Code	Location	Company	Status	Start Date	Modified Date
1	testShaikot	testShaikot	AGROMART-PAKSO...	AGROTECH PRO LA...	OPEN	2022-05-13 16:07:41	2022-05-23
2	TestRawan	TestRawan	DAYANGTEST-1	DRAFTCTEST	OPEN	2022-04-28 11:52:27	2022-05-13
3	TTDI Store - 7/4/2022	TTDI STore	ADDRESSLOCATION	Azri Company Test	OPEN	2022-04-07 11:23:04	2022-04-14
4	rawantest11	rawantest11	ADDRESSLOCATION	Azri Company Test	CLOSED	2022-02-17 21:39:54	2022-02-18
5	rawantest2	rawantest2	ADDRESSLOCATION	Azri Company Test	OPEN	2022-02-17 19:16:31	2022-04-07
6	FEB 2022	FEB 2022	AGROMART-PAKSO...	AGROTECH PRO LA...	CLOSED	2022-02-04 12:13:49	2022-02-17
7	TEST1111	TEST1111	DAYANGTEST-1	DRAFTCTEST	OPEN	2022-01-14 10:46:26	2022-01-14
8	ida test	ida test	stock branch	IDA COMPANY 8888888	OPEN	2021-12-14 14:50:02	2022-05-11
9	Stock Session August	Stock Session August	DAYANGTEST-1	DRAFTCTEST	CLOSED	2021-08-27 12:27:21	2022-02-14
10	Sunway-Aug 2021	Sunway-Aug 2021	TEST	CELEB BEAUTY & S...	OPEN	2021-08-19 15:45:02	2022-02-14

### 1.3 Create a Stock Take Session Ex: STOCK - JUNE 2022

**Create Session**

Session Name *	Session Code *
STOCK - JUNE 2022	JUNE -2022
Location	Company
L-SETAPAK   L-SETAPAK	Celmonze Sdn Bhd
Description	Status
STOCK SESSION	Open

1.4 After creating the Stock Session, go to devices tab to add PIC for handling the Stock Take

The screenshot shows the Stock Take Applet interface. On the left, there is a vertical toolbar with icons for search, refresh, and other functions. The main area has two tabs: "Session Listing" and "Edit Session". The "Session Listing" tab is active, displaying a table of sessions with columns: No., Session Name, Session Code, Location, and Date. One row is selected, highlighted in blue. The "Edit Session" tab is also visible, showing a table with columns: No., Device Name, Device Code, Brand, and Date. A large red box highlights the "+" button in the "Edit Session" table header.

### 1.5 Find a PIC name to add under the created stock take Session

The screenshot shows the Stock Take Applet interface. The "Edit Session" tab is active. A modal dialog box titled "Create Device Session" is open, containing fields for "Device Code & Name" (with a dropdown arrow), "Brand" (dropdown menu), and "Status" (dropdown menu set to "Active"). A red box highlights the "Device Code & Name" input field. The background shows a table of devices with one row selected.

### 1.6 After selecting the PIC, go to the PIC name to start performing your Stock Take

The screenshot shows the Stock Take Applet interface. On the left, there is a vertical toolbar with icons for search, add, edit, delete, and report. The main area has two tabs: "Session Listing" and "Edit Session".

**Session Listing:**

- Search bar: "Search name and code"
- Rows dropdown: "10" (highlighted)
- Page navigation: "page 2 of 4"
- Table columns: No., Session Name, Session Code, Location, Date.
- Data rows (approximate):
 

11	Bangsar - Aug 2021	Bangsar - Aug 2021	L-123	LC
12	Aug 2021	Aug 2021	WAREHOUSE 001 - PJ	AC
13	Adri	7888	CREATELOCATION	Az
14	STock Take July	STock Take July	stock branch	ID
15	Stock Take March	March21	ADDRESSLOCATION	Az
16	LH-HQ	LH-HQ - Apr 2021	LOOB HOLDING	LC
17	L-TONN CABLE - Ma...	L-TONN CABLE	TC	
18	CTS_PUC_WRH - M...	Puchong Warehouse	Cr	
19	LH-HQ - Mar 2021	LOOB HOLDING	LC	
20	STOCK - JUNE 2022	JUNE -2022	L-SETAPAK	Cr

**Edit Session:**

- Search bar: "Search name and code"
- Rows dropdown: "10" (highlighted)
- Page navigation: "page 1 of 1"
- Table columns: No., Device Name, Device Code, Brand.
- Data rows (approximate):
 

1	Pocophone Piji	PP95	Pocophone
2	Priya	Priya	Priya

1.7 Once click into devices, please go to Records Tab

The screenshot shows the Stock Take Applet interface. The "Devices" tab is selected in the "Edit Session" tab. A red box highlights the "Records" tab in the top navigation bar of the right panel.

**Edit Session:**

- Search bar: "Search name and code"
- Rows dropdown: "10" (highlighted)
- Page navigation: "page 1 of 1"
- Table columns: No., Device Name, Device Code, Brand.
- Data rows (approximate):
 

1	Pocophone Piji	PP95	Pocophone
2	Priya	Priya	Priya

**Edit Device Session:**

- Serial Number Type: "Code 128" (highlighted with a red box)
- Scan button: "SCAN"
- Scan code input field: "Scan code.."
- Records tab: "Records" (highlighted with a red box)
- Table columns: No., Item Name, Item Code, Quantity.
- Data rows (approximate):
 

1			
2			

1.8 You can directly scan your serial number scan button

The screenshot shows the Stock Take Applet interface. On the left, there's a vertical toolbar with icons for file operations, search, and settings. The main area has two tabs: 'Edit Session' (active) and 'Edit Device Session'. The 'Edit Session' tab displays a table of devices with columns: No., Device Name, Device Code, and Brand. The 'Edit Device Session' tab shows a table for scanning items with columns: No., Item Name, Item Code, and Quantity. A red box highlights the search bar in the 'Edit Device Session' tab.

### 1.9 Auto-save feature is available

The screenshot shows the Stock Take Applet interface. On the left, there's a vertical toolbar with icons for file operations, search, and settings. The main area has two tabs: 'Session Listing' (active) and 'Edit Session'. The 'Session Listing' tab displays a table of sessions with columns: No., Session Name, Session Code, Location, and other details. The 'Edit Session' tab shows a table with columns: No., Item Name, Item Code, Device Name, and Quantity. A red box highlights the 'SAVE' button in the top right corner of the 'Edit Session' panel.

### 1.10 Once complete performing stock take, please go to the report tab. Filter by Report Type and click Search

The screenshot shows the Stock Take Applet interface. On the left, there is a vertical toolbar with icons for search, add, edit, delete, and filters. The main area has two tabs: "Session Listing" and "Edit Session". The "Session Listing" tab is active, displaying a table of sessions with columns: No., Session Name, Session Code, Location, and Date. A red box highlights the search bar and filter section in the "Edit Session" tab.

No.	Session Name	Session Code	Location	Date
11	Bangsar - Aug 2021	Bangsar - Aug 2021	L-123	2021-08-10
12	Aug 2021	Aug 2021	WAREHOUSE 001 - PJ	2021-08-10
13	Adri	7888	CREATELOCATION	2021-08-10
14	STock Take July	STock Take July	stock branch	2021-08-10
15	Stock Take March	March21	ADDRESSLOCATION	2021-08-10
16	LH-HQ	LH-HQ - Apr 2021	LOOB HOLDING	2021-08-10
17	L-TONN CABLE - Ma...	L-TONN CABLE	TC...	2021-08-10
18	CTS_PUC_WRH - M...	Puchong Warehouse	C...	2021-08-10
19	LH-HQ - Mar 2021	LOOB HOLDING	LC...	2021-08-10
20	STOCK - JUNE 2022	JUNE -2022	L-SETAPAK	2021-08-10

## A.16.4. Menu 02 - Devices

2.1 Go to the device menu to create Device. The Device will be used to assign to the stock take session

The screenshot shows the Device Listing screen. It features a search bar at the top and a table below with columns: No., Device Name, Device Code, Brand, Model, Status, and Modified Date. A red box highlights the search bar and filter section.

No.	Device Name	Device Code	Brand	Model	Status	Modified Date
1	Samsung B	AAA	XIAOMI	F14	INACTIVE	2022-05-23 17:46:43
2	efghjkl	fdvbnm			INACTIVE	2022-05-23 16:34:45
3	Staff1	Staff1			INACTIVE	2022-05-23 16:32:33
4	Priya	Priya	Priya	Priya	ACTIVE	2021-08-19 15:42:55
5	Siti	Scanner	Warehouse	Warehouse	ACTIVE	2021-08-06 11:17:04
6	Xiomi Hafizhi Falah	XH95	Xiomi	Mi 9t Pro	ACTIVE	2021-08-06 11:16:10
7	Test123	Test123	Test123	Test123	ACTIVE	2021-08-03 12:20:00
8	Nik	Bukit Setengkol	Bukit Setengkol	Bukit Setengkol	ACTIVE	2021-07-08 15:59:25
9	Razer Fizi	RF95	Razer	Black Shark	ACTIVE	2021-06-16 17:16:08
10	Iphone	Iphone5	Epal	Epal	ACTIVE	2021-06-16 17:15:33

2.2 Search box is for search for Device Code and Device Name

The screenshot shows a web-based application interface for managing devices. At the top, there's a header with the 'akaun' logo and a user profile icon. Below the header is a purple navigation bar with icons for a clipboard, a search function, and the title 'Stock Take Applet'. On the left side, there's a vertical toolbar with icons for a magnifying glass, a clock, a square, and a grid. The main content area is titled 'Device Listing' and contains a search bar labeled 'Search name and code' with a magnifying glass icon. To the right of the search bar is a table with columns: No., Device Name, Device Code, Brand, Model, Status, and Modified Date. The table lists 10 rows of device information. At the bottom right of the table are buttons for 'Rows' (set to 10), page navigation (page 1 of 2), and column/filter options.

2.3 Advanced Filter search is to search based on brand, model, status and date.

This screenshot shows the same application interface as above, but with a red box highlighting the 'Advanced Filter' section. This section includes a search bar, dropdown menus for 'Brand', 'Model', and 'Status', and two date pickers for 'Modified Date From...' and 'Modified Date To...'. Below these controls are 'RESET' and 'SEARCH' buttons. The rest of the interface, including the table of device listings, remains the same.

2.4 Click "+" button to create new Device and fill in the required fields

The screenshot shows the Stock Take Applet interface. On the left, there is a sidebar with various icons. The main area has a purple header bar with the title "Stock Take Applet". Below the header, there are two main sections: "Device Listing" and "Create Device".

**Device Listing:** This section contains a table with columns: No., Device Name, Device Code, Brand, Model, Status, and Modified Date. A search bar at the top allows filtering by name and code. A red box highlights the "Create" button (+ icon) in the top-left corner of the listing table.

**Create Device:** This is a modal form with fields for Device Name (\*), Device Code (\*), Brand, Model, and Status. The status dropdown is set to "Active". A red box highlights the entire "Create Device" form.

No.	Device Name	Device Code	Brand	Model	Status	Modified Date
1	samsungs3	samsung...	samsung	g32	ACTIVE	2022-06...
2	Samsung B	AAA	XIAMO	F14	INACTIVE	2022-05...
3	efghjkl	fdvbnm			INACTIVE	2022-05...
4	Staff1	Staff1			INACTIVE	2022-05...
5	Priya	Priya	Priya	Priya	ACTIVE	2021-08...
6	Siti	Scanner	Warehouse	Warehouse	ACTIVE	2021-08...
7	Xiomi Haf...	XH95	Xiomi	Mi 9t Pro	ACTIVE	2021-08...
8	Test123	Test123	Test123	Test123	ACTIVE	2021-08...
9	Nik	Bukit Set...	Bukit Set...	Bukit Set...	ACTIVE	2021-07...
10	Razer Fizi	RF95	Razer	Black Sh...	ACTIVE	2021-06...

2.5 Click Create button and Device Listing will show the recent device created top of the listing

The screenshot shows the Stock Take Applet interface. The main area has a purple header bar with the title "Stock Take Applet". Below the header, there is a single "Device Listing" section containing a table with columns: No., Device Name, Device Code, Brand, Model, Status, and Modified Date. A search bar at the top allows filtering by name and code. A red box highlights the first row of the table, which corresponds to the device created in the previous step.

No.	Device Name	Device Code	Brand	Model	Status	Modified Date
1	xiomi123	xiomi123	xiomi	ss34	ACTIVE	2022-06-07 18:04:00
2	samsungs3	samsung123	samsung	g32	ACTIVE	2022-06-07 17:50:54
3	Samsung B	AAA	XIAMO	F14	INACTIVE	2022-05-23 17:46:43
4	efghjkl	fdvbnm			INACTIVE	2022-05-23 16:34:45
5	Staff1	Staff1			INACTIVE	2022-05-23 16:32:33
6	Priya	Priya	Priya	Priya	ACTIVE	2021-08-19 15:42:55
7	Siti	Scanner	Warehouse	Warehouse	ACTIVE	2021-08-06 11:17:04
8	Xiomi Hafizhi Falah	XH95	Xiomi	Mi 9t Pro	ACTIVE	2021-08-06 11:16:10
9	Test123	Test123	Test123	Test123	ACTIVE	2021-08-03 12:20:00
10	Nik	Bukit Setongkol	Bukit Setongkol	Bukit Setongkol	ACTIVE	2021-07-08 15:59:25

2.6 Once click at the specific device, edit the highlighted fields and click button to save changes

The screenshot shows the Stock Take Applet interface. On the left, there is a sidebar with various icons. The main area has a purple header bar with the title "Stock Take Applet". Below the header is a "Device Listing" table with columns: No., Device Name, Device Code, Brand, Model, Status, and Modified Date. The table contains 10 rows of data. To the right of the table is an "Edit Device" form. The "Details" section of the form is highlighted with a red box. It includes fields for Device Name (xiomi12), Device Code (xiomi123), Brand (xiami), Model (ss34), and Status (Active). Below this is a "Created By" field with the value "2022-06-07 18:04:00" and a "Modified Date" field.

## A.16.5. Menu 03 - Reports

3.1 After closing Stock Take session, you may click on to the reports menu to view stock take listing

The screenshot shows the Stock Take Applet interface. On the left, there is a sidebar with various icons. The main area has a purple header bar with the title "Stock Take Applet". Below the header is a "Report Listing" table with columns: Location, Date, Session Name, Status, and Status Variance. The table contains several rows, with the first row expanded to show a list of locations: L-SETAPAK (1), CREATELOCATION (3), DAYANGTEST-1 (5), AGROMART-PAKSONG (2), stock branch (2), ADDRESSLOCATION (7), TEST (2), L-123 (1), WAREHOUSE 001 - PJ (1), and LOOB HOLDING (2). A "Download" button is located at the top right of the table.

## A.16.6. Permission Settings

## A.16.7. Personalization

## A.16.8. Related Applets

This applet also depends on the following applets:

- [Section A.14, “Organization Applet”](#)
- [Section A.11, “Inventory Item Maintenance Applet”](#)

- [Section A.8, “Doc Item Maintenance Applet”](#)

The following applets depends on this applet:

- Applet 3
- Applet 4

Also see

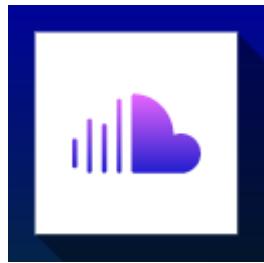
### A.16.9. Pricing

### A.16.10. Release Note

### A.16.11. Roadmap

## A.17. Supplier Maintenance Applet

### A.17.1. Introduction



This is a simple description of the applet, no more than 100 words.

### A.17.2. Modules

This applet is used in the following modules:

- [Section 4.2, “Core Module”](#)
- [Section 4.3, “Accounting Module”](#)
- [Section 4.4, “Inventory Module”](#)
- [Section 4.5, “Point of Sales Module”](#)
- [Section 4.6, “Manufacturing Module”](#)
- [Section 4.7, “Membership Module”](#)
- [Section 4.8, “Referral Module”](#)
- [Section 4.9, “Customer Relationship Management”](#)
- [Section 4.10, “Contact Center Module”](#)
- [Section 4.11, “Digital Marketing Module”](#)
- [Section 4.12, “Marketplace Connector Module”](#)
- [Section 4.13, “Delivery Fulfillment Module”](#)

- [Section 4.14, “CP Commerce Module”](#)
- [Section 4.15, “Procure to Pay Module”](#)
- [Section 4.16, “HR Module”](#)
- [Section 4.17, “Order To Cash Module”](#)
- [Section 4.18, “Warehouse Management Module”](#)
- [Section 4.19, “Customer Data Platform”](#)
- [Section 4.20, “PGW Module”](#)
- [Section 4.21, “Chatbot Module”](#)
- [Section 4.22, “Process Automation Module”](#)
- [Section 4.23, “Datalake Module”](#)

### A.17.3. Menu 01 - e.g. Sales Orders Listing

### A.17.4. Menu 02 - e.g. Line Items

### A.17.5. Permission Settings

### A.17.6. Personalization

### A.17.7. Related Applets

This applet also depends on the following applets:

- Applet 1
- Applet 2

The following applets depends on this applet:

- Applet 3
- Applet 4

Also see

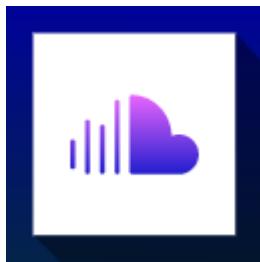
### A.17.8. Pricing

### A.17.9. Release Note

### A.17.10. Roadmap

## A.18. Tax Configuration Applet

## A.18.1. Introduction



This is a simple description of the applet, no more than 100 words.

## A.18.2. Modules

This applet is used in the following modules:

- [Section 4.2, “Core Module”](#)
- [Section 4.3, “Accounting Module”](#)
- [Section 4.4, “Inventory Module”](#)
- [Section 4.5, “Point of Sales Module”](#)
- [Section 4.6, “Manufacturing Module”](#)
- [Section 4.7, “Membership Module”](#)
- [Section 4.8, “Referral Module”](#)
- [Section 4.9, “Customer Relationship Management”](#)
- [Section 4.10, “Contact Center Module”](#)
- [Section 4.11, “Digital Marketing Module”](#)
- [Section 4.12, “Marketplace Connector Module”](#)
- [Section 4.13, “Delivery Fulfillment Module”](#)
- [Section 4.14, “CP Commerce Module”](#)
- [Section 4.15, “Procure to Pay Module”](#)
- [Section 4.16, “HR Module”](#)
- [Section 4.17, “Order To Cash Module”](#)
- [Section 4.18, “Warehouse Management Module”](#)
- [Section 4.19, “Customer Data Platform”](#)
- [Section 4.20, “PGW Module”](#)
- [Section 4.21, “Chatbot Module”](#)
- [Section 4.22, “Process Automation Module”](#)
- [Section 4.23, “Datalake Module”](#)

## A.18.3. Menu 01 - e.g. Sales Orders Listing

#### **A.18.4. Menu 02 - e.g. Line Items**

#### **A.18.5. Permission Settings**

#### **A.18.6. Personalization**

#### **A.18.7. Related Applets**

This applet also depends on the following applets:

- Applet 1
- Applet 2

The following applets depends on this applet:

- Applet 3
- Applet 4

Also see

#### **A.18.8. Pricing**

#### **A.18.9. Release Note**

#### **A.18.10. Roadmap**

### **A.19. UCC Applet**

#### **A.19.1. Introduction**



This is a simple description of the applet, no more than 100 words.

### A.19.2. Modules

This applet is used in the following modules:

- Section 4.2, “Core Module”
- Section 4.3, “Accounting Module”
- Section 4.4, “Inventory Module”
- Section 4.5, “Point of Sales Module”
- Section 4.6, “Manufacturing Module”
- Section 4.7, “Membership Module”
- Section 4.8, “Referral Module”
- Section 4.9, “Customer Relationship Management”

- [Section 4.10, “Contact Center Module”](#)
- [Section 4.11, “Digital Marketing Module”](#)
- [Section 4.12, “Marketplace Connector Module”](#)
- [Section 4.13, “Delivery Fulfillment Module”](#)
- [Section 4.14, “CP Commerce Module”](#)
- [Section 4.15, “Procure to Pay Module”](#)
- [Section 4.16, “HR Module”](#)
- [Section 4.17, “Order To Cash Module”](#)
- [Section 4.18, “Warehouse Management Module”](#)
- [Section 4.19, “Customer Data Platform”](#)
- [Section 4.20, “PGW Module”](#)
- [Section 4.21, “Chatbot Module”](#)
- [Section 4.22, “Process Automation Module”](#)
- [Section 4.23, “Datalake Module”](#)

#### **A.19.3. Menu 01 - e.g. Sales Orders Listing**

#### **A.19.4. Menu 02 - e.g. Line Items**

#### **A.19.5. Permission Settings**

#### **A.19.6. Personalization**

#### **A.19.7. Related Applets**

This applet also depends on the following applets:

- Applet 1
- Applet 2

The following applets depends on this applet:

- Applet 3
- Applet 4

Also see

#### **A.19.8. Pricing**

#### **A.19.9. Release Note**

#### **A.19.10. Roadmap**

## A.20. URL Shortening Applet

### A.20.1. Introduction

This is a simple description of the applet, no more than 100 words.

Vincent Lee, [02/06/2022 9:33 PM] <https://drive.google.com/file/d/1IL4nMJRTWdENwB7t0402PNtAU0msEghE/view?usp=sharing>

Vincent Lee, [02/06/2022 9:36 PM] <https://wavelet.atlassian.net/browse/BLPR-24640>

Vincent Lee, [02/06/2022 9:39 PM] i just forwarded you several emails

Vincent Lee, [02/06/2022 9:40 PM] Below attached are the urls for the jamboard and moqup:  
moqups: <https://app.moqups.com/nVNNUQ9keb/edit/page/a3d66bff5> jamboard:  
<https://jamboard.google.com/d/125D0f5IAFhqDPBbytADRVxxfHyOB77QPH-lWH8pv3oY/viewer?f=0>

Vincent Lee, [02/06/2022 9:40 PM] <https://jamboard.google.com/d/125D0f5IAFhqDPBbytADRVxxfHyOB77QPH-lWH8pv3oY/viewer?f=0>

Vincent Lee, [02/06/2022 9:42 PM] [https://docs.google.com/spreadsheets/d/19omgwglZ6QfZVdnfQQQ65VcreWfqssJhCDzy\\_OMdeiw/edit#gid=1640556344](https://docs.google.com/spreadsheets/d/19omgwglZ6QfZVdnfQQQ65VcreWfqssJhCDzy_OMdeiw/edit#gid=1640556344)

Useful pages for Universal Links/App Links: - <https://branch.io/what-is-deep-linking/> - <https://developer.apple.com/library/archive/documentation/General/Conceptual/AppSearch/UniversalLinks.html> - <https://developer.android.com/training/app-links> - <https://developer.android.com/studio/write/app-link-indexing.html> - <https://github.com/ionic-team/ionic-plugin-deeplinks>

Useful pages for Firebase Dynamic Links: - <https://firebase.google.com/docs/dynamic-links/create-manually?authuser=0> - <https://firebase.google.com/docs/reference/dynamic-links/link-shortener?authuser=0>

### A.20.2. Modules

This applet is used in the following modules:

- Section 4.2, “Core Module”
- Section 4.3, “Accounting Module”
- Section 4.4, “Inventory Module”
- Section 4.5, “Point of Sales Module”
- Section 4.6, “Manufacturing Module”
- Section 4.7, “Membership Module”
- Section 4.8, “Referral Module”
- Section 4.9, “Customer Relationship Management”
- Section 4.10, “Contact Center Module”

- Section 4.11, “Digital Marketing Module”
- Section 4.12, “Marketplace Connector Module”
- Section 4.13, “Delivery Fulfillment Module”
- Section 4.14, “CP Commerce Module”
- Section 4.15, “Procure to Pay Module”
- Section 4.16, “HR Module”
- Section 4.17, “Order To Cash Module”
- Section 4.18, “Warehouse Management Module”
- Section 4.19, “Customer Data Platform”
- Section 4.20, “PGW Module”
- Section 4.21, “Chatbot Module”
- Section 4.22, “Process Automation Module”
- Section 4.23, “Datalake Module”

#### A.20.3. Menu 01 - e.g. Sales Orders Listing

#### A.20.4. Menu 02 - e.g. Line Items

#### A.20.5. Permission Settings

#### A.20.6. Personalization

#### A.20.7. Related Applets

This applet also depends on the following applets:

- Applet 1
- Applet 2

The following applets depends on this applet:

- Applet 3
- Applet 4

Also see

#### A.20.8. Pricing

#### A.20.9. Release Note

#### A.20.10. Roadmap