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:

- Epub Format
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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 life 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.

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| Rank of a users 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"

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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 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 Section 4.2, “Core Module” should be installed, configured in proper sequence, before you proceed to install the other applets.

2.2.2. Applet-Catalog Maintenance

Applet-Catalog is a curated list of applets combined with a curated list of users with permissions to install these applets in the list. Users are able to open the Applet Store to see a list of Private Catalogs and install the applets accordingly. Currently, only the Platform System Administrator is allowed to create the Applet-Catalogs, and add users to the

When adding an applet to a catalog, the Platform System administrators get to specify the tenant, rank, edition and addons. While the tenant and rank options do not affect the subscription pricing, the edition and addons determines the monthly subscription fee of the applets.

A tenant OWNER/ADMIN who happens to also be the ADMIN/OWNER of a Applet-Catalog is able to add/remove applets from the Applet-Catalog as well as adding or removing users from the Applet-Catalog. Typically, many catalogs would be created for the users of a tenant. In the example below, we make use of some fictitious company names for elaboration purpose.

Kindly refer to Section 2.2.3, "Fictitious Companies" for elaboration of **fictitious** names.

Example Applet-Catalog for ABC Group level top management

Applet List	User List	Remarks
* **Organization Applet Rank: OWNER ,** Tenant: abc-main , **Edition: Default ,** Addons : n/a , * **Organization Applet Rank: OWNER ,** Tenant: abc-pharmacy , **Edition: Default ,** Addons : n/a , * **Financial Report Applet Rank: OWNER ,** Tenant: abc-main , **Edition: Default ,** Addons : n/a , * **Financial Report Applet Rank: OWNER ,** Tenant: abc-pharmacy , **Edition: Default ,** Addons : n/a ,	* abc-group-director-01 , * abc-group-director-02 , * abc-group-director-03 , * abc-group-director-04 ,	The people included in this list are holding positions at the group level, hence, they need to have access to applets linked to various tenants, and they should have the permissions to modify any settings as OWNER of the applets as well.

Example Applet-Catalog for ABC Consumer Electronics Division management

Applet List	User List	Remarks
* **Organization Applet Rank: ADMIN ,** Tenant: abc-main , **Edition: Default ,** Addons : n/a , * **Financial Report Applet Rank: ADMIN ,** Tenant: abc-main , **Edition: Default ,** Addons : n/a ,	* abc-ce-retail-director-01 , * abc-ce-retail-director-02 ,	The people included in this list are holding positions at the **business division** level (for ABC Group - consumer electronics only), hence, they need do not have access to applets linked to **abc-pharmacy** tenant.

Example Applet-Catalog for ABC Pharmacy Division management

Applet List	User List	Remarks
* **Organization Applet Rank: ADMIN ,** Tenant: abc-pharmacy , **Edition: Default ,** Addons : n/a , * **Financial Report Applet Rank: ADMIN ,** Tenant: abc-pharmacy+ **Edition: Default ,** Addons : n/a ,	* abc-pharmacy-director-01 , * abc-pharmacy-director-02 , * abc-pharmacy-director-03 ,	The people included in this list are holding positions at the **business division** level (for ABC Group Pharmacy businesses only), hence, they need do not have access to applets linked to **abc-pharmacy** tenant.

Example Applet-Catalog for ABC Consumer Electronics Division - Finance Managers

Applet List	User List	Remarks
* **Organization Applet** **Rank: ADMIN ,** Tenant: abc-main , **Edition: Default ,** Addons : n/a , * **Financial Report Applet** **Rank: ADMIN ,** Tenant: abc-main , **Edition: Default ,** Addons : n/a , * **Tax Configuration Applet** **Rank: OWNER ,** Tenant: abc-main , **Edition: Default ,** Addons : n/a , * **Chart of Account Applet** **Rank: OWNER ,** Tenant: abc-main , **Edition: Default ,** Addons : n/a , * **Cashbook Applet** **Rank: OWNER ,** Tenant: abc-main , **Edition: Default ,** Addons : n/a , * **Entity Maintenance Applet** **Rank: OWNER ,** Tenant: abc-main , **Edition: Default ,** Addons : n/a , * **Employee Maintenance Applet** **Rank: OWNER ,** Tenant: abc-main , **Edition: Default ,** Addons : n/a , * **Bank Reconciliation Applet** **Rank: OWNER ,** Tenant: abc-main , **Edition: Default ,** Addons : Auto-Match	* abc-ce-finance-manager-01 , * abc-ce-finance-manager-02 ,	The people included in this list are holding positions at the **business division** level (for ABC Group Consumer Electronics businesses only), hence, they need do not have access to applets linked to **abc-pharmacy** tenant.

Example Applet-Catalog for ABC Consumer Electronics Division - Finance Executives

Applet List	User List	Remarks
* **Tax Configuration Applet** **Rank: ADMIN ,** Tenant: abc-main , **Edition: Default ,** Addons : n/a , * **Chart of Account Applet** **Rank: ADMIN ,** Tenant: abc-main , **Edition: Default ,** Addons : n/a , * **Doc Item Maintenance Applet** **Rank: ADMIN ,** Tenant: abc-main , **Edition: Default ,** Addons : n/a , * **Cashbook Applet** **Rank: ADMIN ,** Tenant: abc-main , **Edition: Default ,** Addons : n/a , * **Inventory Item Maintenance Applet** **Rank: ADMIN ,** Tenant: abc-main , **Edition: Default ,** Addons : n/a , * **Entity Maintenance Applet** **Rank: ADMIN ,** Tenant: abc-main , **Edition: Default ,** Addons : n/a , * **Employee Maintenance Applet** **Rank: ADMIN ,** Tenant: abc-main , **Edition: Default ,** Addons : n/a , * **Bank Reconciliation Applet** **Rank: MEMBER ,** Tenant: abc-main , **Edition: Default ,** Addons : Auto-Match * **Internal Payment Voucher Applet** **Rank: MEMBER ,** Tenant: abc-main , **Edition: Default ,** Addons : FPX-Integration	* abc-ce-finance-exec-01 , * abc-ce-finance-exec-02 ,	The people included in this list are holding positions at the **business division** level (for ABC Group Consumer Electronics businesses only), hence, they need do not have access to applets linked to **abc-pharmacy** tenant.

Example Applet-Catalog for ABC Consumer Electronics Division - HQ Operation Managers

Applet List	User List	Remarks
* **Doc Item Maintenance Applet** **Rank: MEMBER ,** Tenant: abc-main , **Edition: Default ,** Addons : n/a , * **Customer Maintenance Applet** **Rank: ADMIN ,** Tenant: abc-main , **Edition: Default ,** Addons : n/a , * **POS - General Applet** **Rank: ADMIN ,** Tenant: abc-main , **Edition: Default ,** Addons : n/a , * **Internal Sales Order Applet** **Rank: ADMIN ,** Tenant: abc-main , **Edition: Default ,** Addons : n/a , * **Inventory Item Maintenance Applet** **Rank: ADMIN ,** Tenant: abc-main , **Edition: Default ,** Addons : n/a , * **Doc Item Maintenance Applet** **Rank: MEMBER ,** Tenant: abc-main , **Edition: Default ,** Addons : n/a , * **Internal Purchase Order Applet** **Rank: ADMIN ,** Tenant: abc-main , **Edition: Default ,** Addons : n/a , * **Report - Daily Sales Applet** **Rank: ADMIN ,** Tenant: abc-main , **Edition: Default ,** Addons : n/a ,	* abc-ce-hq-ops-manager-01 , * abc-ce-hq-ops-manager-02 ,	The people included in this list are holding positions at the **business division** level (for ABC Group - consumer electronics only), hence, they need do not have access to applets linked to **abc-pharmacy** tenant.

Example Applet-Catalog for ABC Consumer Electronics Division - Branch Cashiers

Applet List	User List	Remarks
* **Doc Item Maintenance Applet** **Rank: MEMBER ,** Tenant: abc-main , **Edition: Default ,** Addons : n/a , * **Customer Maintenance Applet** **Rank: MEMBER ,** Tenant: abc-main , **Edition: Default ,** Addons : n/a , * **POS - General Applet** **Rank: MEMBER ,** Tenant: abc-main , **Edition: Default ,** Addons : n/a , * **Internal Sales Order Applet** **Rank: MEMBER ,** Tenant: abc-main , **Edition: Default ,** Addons : n/a , * **Inventory Item Maintenance Applet** **Rank: MEMBER ,** Tenant: abc-main , **Edition: Default ,** Addons : n/a , * **Doc Item Maintenance Applet** **Rank: MEMBER ,** Tenant: abc-main , **Edition: Default ,** Addons : n/a , * **Report - Daily Cashier Report Applet** **Rank: MEMBER ,** Tenant: abc-main , **Edition: Default ,** Addons : n/a ,	* abc-ce-hq-branch-cashier-01 , * abc-ce-hq-branch-cashier-02 ,	The people included in this list are holding positions at the **business division** level (for ABC Group - consumer electronics only), hence, they need do not have access to applets linked to **abc-pharmacy** tenant.

2.2.3. Fictitious Companies

For the ease of elaboration, we will be using a fictitious company throughout this guide.

NOTE	*Disclaimer : Use of fictitious names*

> The example companies, organizations, products, domain names, e-mail addresses, logos, people, places, and events depicted herein are fictitious. No association with any real company, organization, product, domain name, e-mail address, logo, person, places, or events is intended or should be inferred.

2.2.3.1. Fictitious Company Names

Group (Nickname)	Tenant	Company Name	Users	Description
ABC Group	abc-main	ABC Public Listed Berhad	Lim-KH	A large conglomerate in Malaysia, public listed.
		ABC CE (Malaysia) Sdn Bhd	Lim-KC	The largest consumer electronic chain store in Malaysia with 120 branches
		ABC IT (Malaysia) Sdn Bhd	Wai-Hang	A premium IT retailer in Malaysia with 15 branches
		ABC CE (Singapore) Pte Ltd	Johnny	Retail consumer electronics chain store with 20 branches in Singapore owned by ABC Group in Malaysia
		ABC IT (Singapore) Pte Ltd	Wong	Retail computer chain stores with 30 branches in Singapore
	abc-pharmacy	ABC Pharmacy (Malaysia) Sdn Bhd	Michael	Malaysia Pharmacy chain with 50 branches owned by ABC Group
		ABC Pharmacy (Singapore) Pte Ltd	Stephen	Singapore Pharmacy retail with 30 branches owned by ABC Group

PC-City Group	pccity	PC-City Hypermarket Sdn Bhd	Yee	The largest IT Hypermarket in Malaysia with 10 branches
Tander	tander	Tander Sdn Bhd	Eric	Largest computer chainstores with 60 branches
Ingrem	ingrem	Ingrem Sdn Bhd	Victor	One of the largest IT distributors in Malaysia
UncleSam	unclesam	Uncle Sam Sdn Bhd	Kim	One of the largest android handphone manufacturer in the world.

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 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
Custom Hostnames	*.akaun.xyz	*.akaun.app	*.akaun.net
Region	Singapore	Singapore	Singapore
Status	Live	Live	Live
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.
Shell Website	https://akaun.dev	https://akaun.cloud	https://akaun.com
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

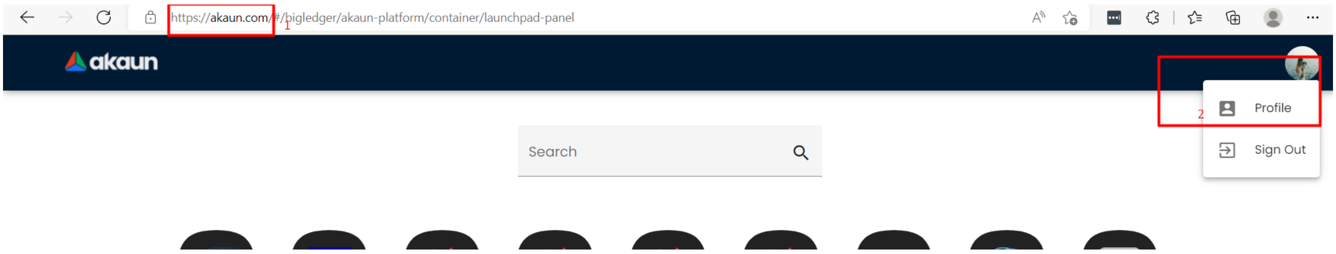
Registration of user account in development environment

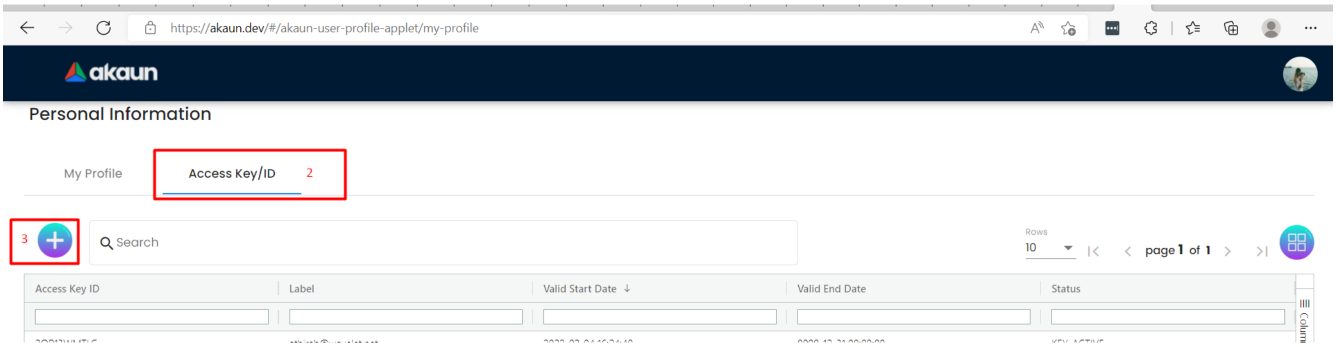
Similar to product environment, a new user register a development account at: https://akaun.dev

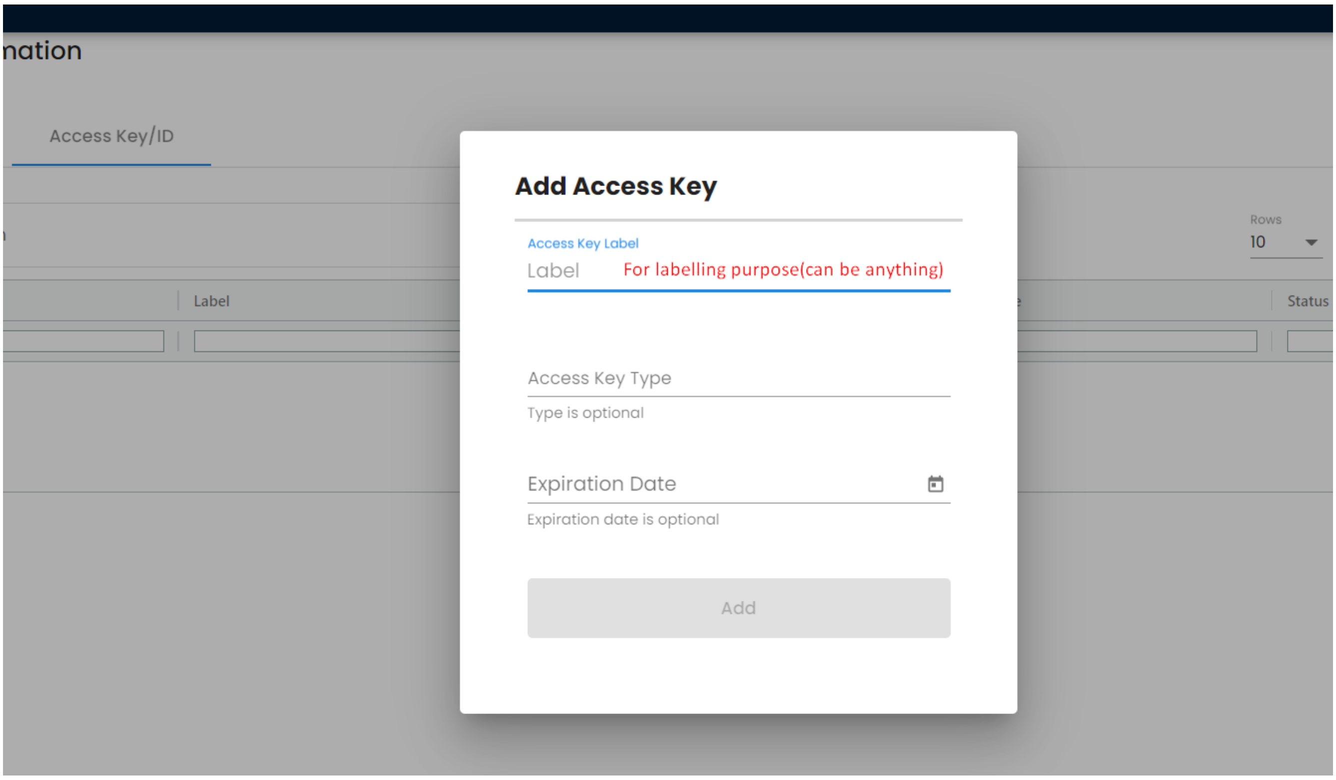
- Register an account using the same email or phone at https://akaun.com
- Activate account using 6 digits number
- Login and install desired applets

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:







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

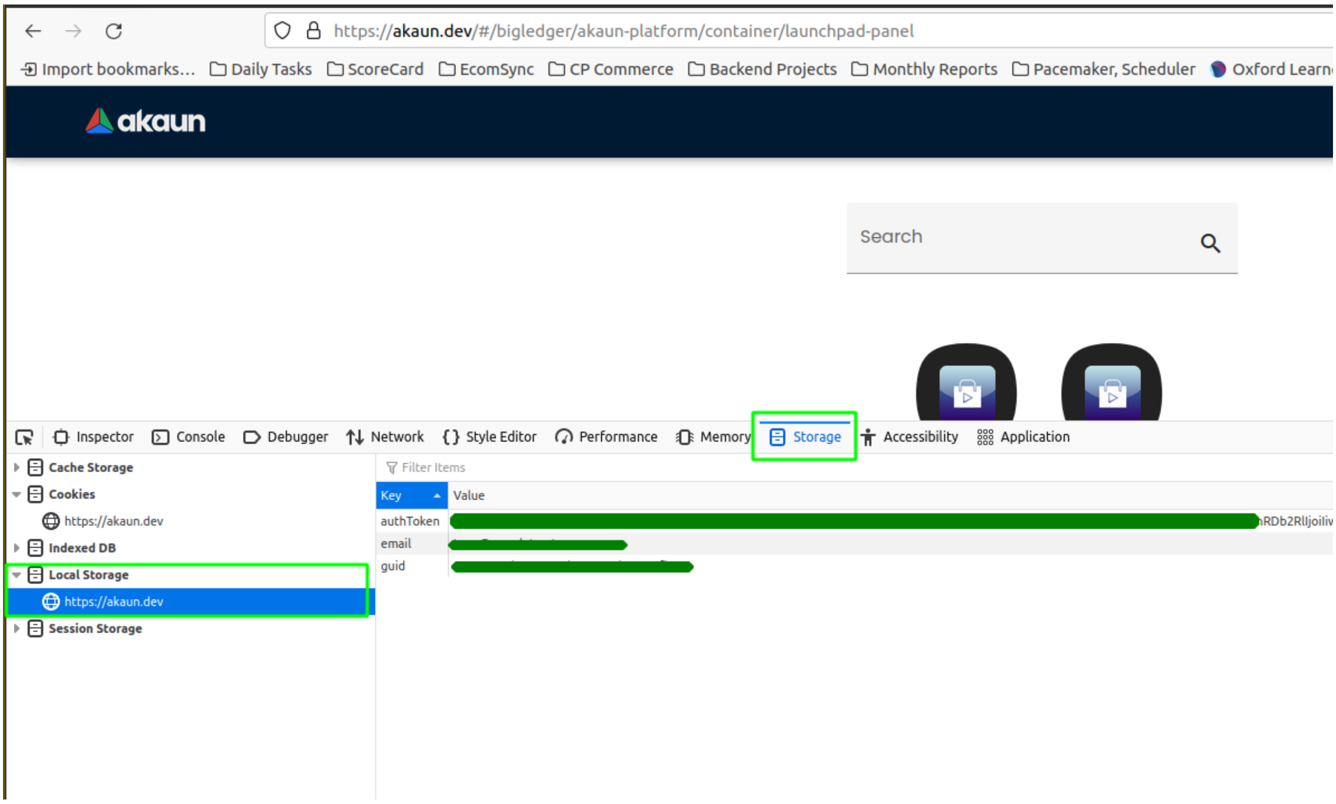
Api Developers may test the api in stoplight documentation: https://bigledger.stoplight.io/docs/blg-

Environment	Website URL	Api URL
Sandbox (development)	https://akaun.dev	https://api.akaun.dev/endpoint_url
Staging environment	https://akaun.cloud	https://api.akaun.cloud/endpoint_url
Production environment	https://akaun.com	https://api.akaun.com/endpoint_url

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 "Local Storage" under "Storage" tag



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/6eddda835861e-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/6eddda835861e-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 and delivery

details

- bl_fi_generic_doc_line
    - consists of details ofitem 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
    - 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.19, “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.18, “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.19, “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.20, “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 guide covers the following topics:

- Project Implementation
  The implementation guide provides you the necessary steps to implementing a brand new cp-commerce project. This include the preparation needed before the implementation, the workflow and knowledge that you will need, what to do first, and what to do next etc.
- Content Management System
  This chapter provides all the features and functions of the Content Management System for CP-Commerce module to guide you with various configurations and settings
- Order Fulfillment
  We discuss about the shipping fees, various scenarios in order fulfillment, integration with third party logistics, and applets required for in-house delivery fleet, self pickup etc.
- Customer Experience
  This chapter covers the topics of how cp-commerce operators could optimize the user journey and experience by discussing about the lifecycle of a shopping cart, how to do cross selling, the use of proactive bots and spending limits to provide a better overall experience.
- ERP Integration
  The CP-Commerce is not just a shopping cart, its backboned is built with a solid ERP foundation, this chapter provide insights into the possibilities of using CP-Commerce to achieve much more

by leveraging on the ERP data out of the box.

- Memberships
  In order to promote greater loyalty among the customers, CP-Commerce is embedded with Membership program. The mechanism and features of membership points reward and redemption are covered in this chapter.
- o2o
  Being much more than just a shopping cart, the cp-commerce when used together with the Contact Center module, Sales Order Applet, Point of Sales, Issue Tracker, RMA applets and so on, businesses can implement o2o seamlessly without integrations!
- Payment and Collection In this chapter, we talk about the cashbooks and settlement methods, partial settlements, payment integrations, recurring payment and collection.
- Product Maintenance Most of the product configurations are done in the "Doc Item Maintenance Applet". We discuss about how the settings in Doc Item Maintenance applet relates to cp-commerce. This would include, add-ons, attributes, categories, extended warranty, made-to-orders, pre-orders, pricing scheme, product bundle and variants, reviews and rating, unit of measure etc.
- Traffic Generation Having a shopping cart is not good enough, there is much more that we could do to drive traffic to the website. In this chapter, we talk about affiliate programs, google ads, google analytics, meta ads, referral program, SEO, UTM tracking and vouchers.
- B2B2C With various other integrations, for example Apple - ACPP, Microsoft ESD, Product QR Code, OCR, Multi-Vendor functionality, T2T and marketplace connector module, the CP-Commerce has all the necessary ingredients for businesses to use it for B2B2C. This chapter elaborate how businesses could implement B2B2C.

4.14.2. Project Implementation

4.14.2.1. 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.

4.14.2.2. 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.

4.14.2.3. Project Kickstart Meeting

4.14.2.4. Weekly Meeting

4.14.2.5. Agile Method

4.14.2.6. Cashflow Projection

4.14.2.7. Human Resource Management

- Milestones and Rewards

4.14.2.8. Communication Management

4.14.2.9. Risk Management

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

4.14.2.10. UAT (User Acceptance Test)

4.14.2.11. Requirement Analysis

4.14.2.12. Project Goes Live

4.14.2.13. Post Mortem

4.14.2.14. UI Design

4.14.2.15. QC Checklist

4.14.2.16. Work Breakdown

URL and Domain Name

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

UI Design

- Both mobile and desktop

Applet Installations

- Applet Catalogs
- Applet installations via Applet Store

Please install the applet in the following modules:

- Core Module Applets
- Membership Module Applets
- [h4_cpcom_mod_module_applets]

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

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.

PGW Configurations

Please visit PGW Module for more information about the configuration of PGW Module.

Digital Signature

Post Registration Configuration

Third Party Authentication and Authorization

Google reCaptcha

Google Analytics

Review Settings

Menu List

Label List

Content Category

Static Posts

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

Restricted Access By Entity Accounts

Layout Instance

Configuring Language, Region and Country

Voucher Management

Quality Control Checklist

4.14.3. Content Management System

4.14.3.1. Hostname Setup

For every website configured in the CP-Commerce Admin Applet, it is possible for our users to configure the multiple cloudfront distributions and each cloudfront distribution is linked to a certain hostnames that allow the web browser to visit these websites.

Platform Sub-Domain

A platform sub-domain for each website is constructed with the following format:

- website-code.tenant-code.akaun.net (for production environment)
- website-code.tenant-code.akaun.app (for staging environment)
- website-code.tenant-code.akaun.xyz (for development environment)

When you first starting a website, by default, the akaun platform would create the following hostname automatically for you using combination of tenant-code and website code. For example, if your tenant code is "mytenant" and your website code is "resellers", the CP-Commerce would create the hostname as resellers.mytenant.akaun.net.

This sub-domain provided by Akaun platform would be powered up immediately, so that the users of a website could visit the website right away. As the "akaun.net" DNS is hosted by us, no domain name verification or CNAME is required on your side.

Technical Background

This section is only meant for technical readers that would like to dig into the AWS cloudfront technical details of how things work:

Discussion with Tuan on Cloudfront configurations

We make use of DNS validation as follows: AWS Certificate Manager - DNS Validation

You may watch the following guide to get some basic understanding of DNS:

► https://www.youtube.com/watch?v=YV5tkQYcvfg *(YouTube video)*

DNS Records for Newbies - How To Manage Website Records

► https://www.youtube.com/watch?v=cQ0anQfsSOw *(YouTube video)*

DNS Records

► https://www.youtube.com/watch?v=WqhgGpv4cKY *(YouTube video)*

CNAME vs A Record

Transition and configuration of custom domain names

Assuming your company owns "mydomain.com", and you would like to implement the cp-commerce. But during the implementation, you would like to configure a temporary custom sub-domain and use it, before you make use of the top level domain name, to point to the cp-commerce website as follows:

- https://newstore.mydomain.com/
  This sub-domain "estore" would be used for the time being, while the current website is still life and being used (Let’s say, https://mydomain.com/ and https://www.mydomain.com). This temporary hostname could be configured in advanced.
- https://mydomain.com/
  After the new website implementation is completed, and when we are ready to launch the new website, we would be getting ready to retire the old website , and configure this second hostname just like the "newstore.mydomain.com" to go live.

Custom Sub-domain

At this time, the hostname can be created by the Platform SysAdmin only, using the Platform SysAdmin applet.

TIP	In future, we may allow hostname to be created under using 2 approach: • Platform SysAdmin Applet • CP-Commerce Admin Applet

The very first step of creating a sub-domain is to perform ACM validation. You will be given the following:

ACM Validation DNS Record

- Record Type: CNAME
- Record Name: **_7760b3c88f1556jjjjjjjjjjjj**.mydomain.com
- Record Value: **_80fb2b1ef05e7xxxxxxxxxxx.yyyyyyyyyyy.acm-validations.aws.**

You are required to add the above into your DNS Record.

After you have completed the validation of the ACM certificate, the next step is to create and configure your custom sub-domain to point to the CloudFront Distribution.

Sub-domain CNAME forwarding

- Record Type: CNAME
- Record Name: **sub-domain-name**.mydomain.com
- Record Value: **xxxxxxxxx**.cloudfront.net

That's it, nothing more, all you need to do next is to visit https://sub-domain-name.mydomain.com

4.14.3.2. Third Party Logins

4.14.3.3. Activities

4.14.3.4. Forms

4.14.3.5. Identity Management

4.14.3.6. Internationalization

4.14.3.7. Media Library

4.14.3.8. Posts and Topics

4.14.3.9. Power Filter

4.14.3.10. WebChat

Two ways to implement this…

- UCC
- Tawk.to

4.14.3.11. Digital Marketing

4.14.3.12. Mobile Apps

4.14.3.13. Widgets

Branch Locators

include::pages/cms/widgets/statement-of-account/00_overview.adoc[leveloffset=5]a

inlucde::pages/fulfillment/00_overview.adoc[leveloffset=3]
inlucde::pages/fulfillment/customer_shipping_fees.adoc[leveloffset=4]
inlucde::pages/fulfillment/third_party_logistics.adoc[leveloffset=4]
inlucde::pages/fulfillment/inhouse_delivery.adoc[leveloffset=4]
inlucde::pages/fulfillment/partial_delivery.adoc[leveloffset=4]
inlucde::pages/fulfillment/same_day_delivery.adoc[leveloffset=4]
inlucde::pages/fulfillment/delivery_tracking.adoc[leveloffset=4]
inlucde::pages/fulfillment/self_pickup.adoc[leveloffset=4]

4.14.4. Customer Experience

4.14.4.1. Shopping Cart

4.14.4.2. Cross Selling

4.14.4.3. Favourites

Can be wish list , or products add to favourite

4.14.4.4. Proactive Bots

Can be used for service reminders

Renewal of contracts

End of life, end of warranty

New products

End of product life (like mobile phones, every 3 years)

4.14.4.5. Spending Limits

Protecting customer, credit card frauds etc.

4.14.5. ERP Integration

4.14.5.1. Inventory

4.14.5.2. Accounting

4.14.5.3. Bank Reconciliation

4.14.5.4. Account Payable

4.14.5.5. Account Receivable

4.14.5.6. Membership Points

This should include "REBATES" as well.

4.14.6. Memberships

4.14.6.1. Points Redemption

4.14.6.2. Points Reward

4.14.6.3. Rebates

4.14.7. O2O

4.14.7.1. Contact Center

4.14.7.2. Internal Sales Order Applet

4.14.7.3. Offline POS

4.14.7.4. Issue Tracker

4.14.7.5. RMA

RMA stands for Return Merchandise Authorization.

4.14.8. Payment and Collection

4.14.8.1. Cashbooks

4.14.8.2. Partial Settlements

4.14.8.3. Payment Integration

4.14.8.4. Recurring Payments

4.14.8.5. Recurring Collection

4.14.9. Product Maintenance

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

4.14.9.1. AddOns

4.14.9.2. Attributes

4.14.9.3. Categories

4.14.9.4. Extended Warranty

4.14.9.5. Linking Product To Website

4.14.9.6. Made To Order (MTO)

4.14.9.7. Pre-Orders

4.14.9.8. Pricing Scheme

4.14.9.9. Product Bundle

The CP Commerce will do automatic unbundling of the product, to ensure inventory and ecomsync are always up to date, including the child items

4.14.9.10. Product Variants

4.14.9.11. Reviews and Rating

4.14.9.12. Unit Of Measure

4.14.10. Traffic Generation

4.14.10.1. Affiliate Programs

4.14.10.2. Google Ads

4.14.10.3. Google Analytics

4.14.10.4. Meta Ads

4.14.10.5. Referral Program

4.14.10.6. Search Engine Optimization

4.14.10.7. UTM Tracking

4.14.10.8. Vouchers

4.14.11. B2B2C

talk about the end to end supply chain

From Retailer’s perspective giving microsoft ESD as example Machine’s Apple extended warranty integration

From Product/Brand Owner's perspective using Celllabs as example for "distribution" type of companies, rewarding salesman in a retail company using Biolife as an example.

Handling of dealer / orders , with credit limits 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

4.14.11.1. Apple - ACPP

4.14.11.2. Microsoft ESD

4.14.11.3. Retail Salesman

4.14.11.4. OCR

4.14.11.5. Individual vs Corporate

4.14.11.6. Multi-Vendors

4.14.11.7. Staff Purchases

4.14.12. Marketplace Connector

The tricky part, orders bought from the market place may not be linked to the customer account because billing is paid by Lazada / Shoppee. We are abel to link to the customer account, providing a seamless experience.

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 othe 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

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- 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 consiste 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

- Firstly, loggin to AWS for specefic environment. Here, staging environment will be shown. It's posible to have multiple loggin for diffrent environments. developer need to run AWS SSO commands and allow permission from sso account logged in the browser. image::aws-cmd.png[aws commands] image::aws.png[aws browser]
- Get the latest code using git pull
- Change the directory to 'micro-fe'
- Find the deployment-script for your applet in the bin folder. For example, we are looking for 'commission-scheme-applet' image::bin-staging.png[find deployment-script]
- Secify the path of the deployment script and run it. For the 'commission-scheme-applet' the script should be './bin/staging/commission_scheme_applet_publish.sh'
- A successful deploment should look like this. It confirms the deployment of the applet's element file in the s3 directory. image::success-deployment.png[successful deployment]
- If a developer deploying an applet for the first time, he/she must get the object url to publish the applet. image::object-url.png[object url from s3 bucket]

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.

==Create Permission Templates * Firstly, a developer needs to identify the webservices according to the CRUD (Create, Read, Update, Delete) operations in an applet. To identify the webservices for the specific CRUD operation developer may use the source code or network tab in the browser's developer tools. We will be using browser's developer tools here. image::network-tab.png[Developer's tools] * List down all the webservices for each CRUD operation separately. For example, to view the list of Internal Purchase Return Listing, these are the webservices have been used. image::webservices-listing.png[Webservice Listing] * Then, find the permission definitions for the listed web services. Developers use 'blg-akaun-platform-java' library to find the permission definitions. Every webservice has a controler.java file containing the permission definitions in the java library. There are permission definitions for GET, PUT, POST, DELETE operations and permissions for Admin, Owner and Users. image::find-permission-definitions.png[Find Permission Definitions] * List down the permission definitions for the listed webservices initially. image::permission-definition-listing.png[Permission Definitions Listing] permission-definition-listing * Create Permission Templates in the 'Developer Admin' applet. **Each operation should have one/multiple permission templates** Find your applet and create the tempaltes first. The naming conventions for a permission temaplate code should start with applet code and ends with '_PERM_TEMPLATE' image::Create-Permission-Templates.png[Create Permission Templates] **Insert the permission definitions into the permission templates image::insert-permission-definitions.png[Insert Permission Definitions]

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

Item Maintenance is used to create and edit item information that can be used in other transnational applets such as the POS and GRN applets. Items can be created manually or synced from EMP. This user guide will help you have a clear understanding on how to use the Doc Item Maintenance, including, applet creation and adding additional details to the item.

A.8.2. Modules

This applet is used in the following modules:

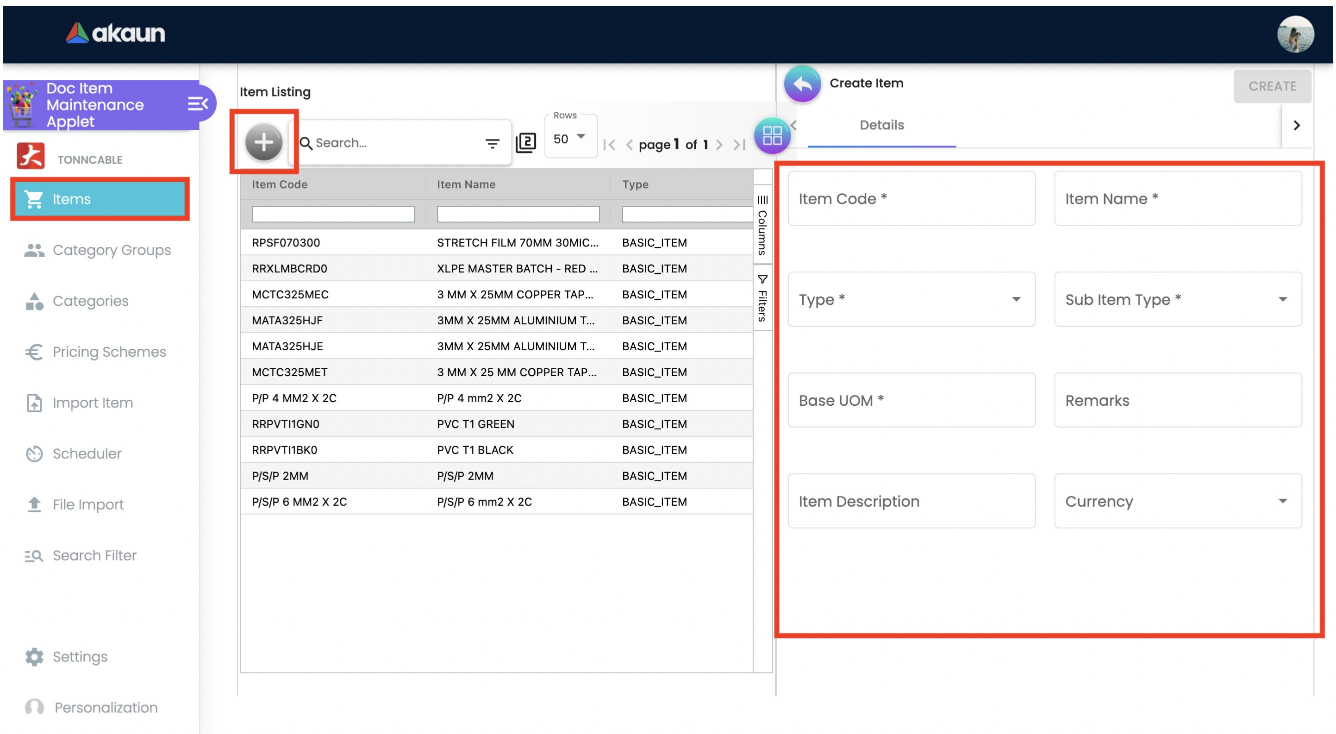
- Section 4.2, “Core Module”
- Section 4.3, “Accounting Module”
- Section 4.4, “Inventory Module”
- Section 4.5, “Point of Sales Module”
- Section 4.6, “Manufacturing Module”
- Section 4.7, “Membership Module”
- Section 4.8, “Referral Module”
- Section 4.9, “Customer Relationship Management”
- Section 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 - Items

Please go to Akaun.com - Doc Item Maintenance

A.8.3.1. ITEMS - items can be created manually or synced from EMP (if the user is currently using Wavelet EMP)



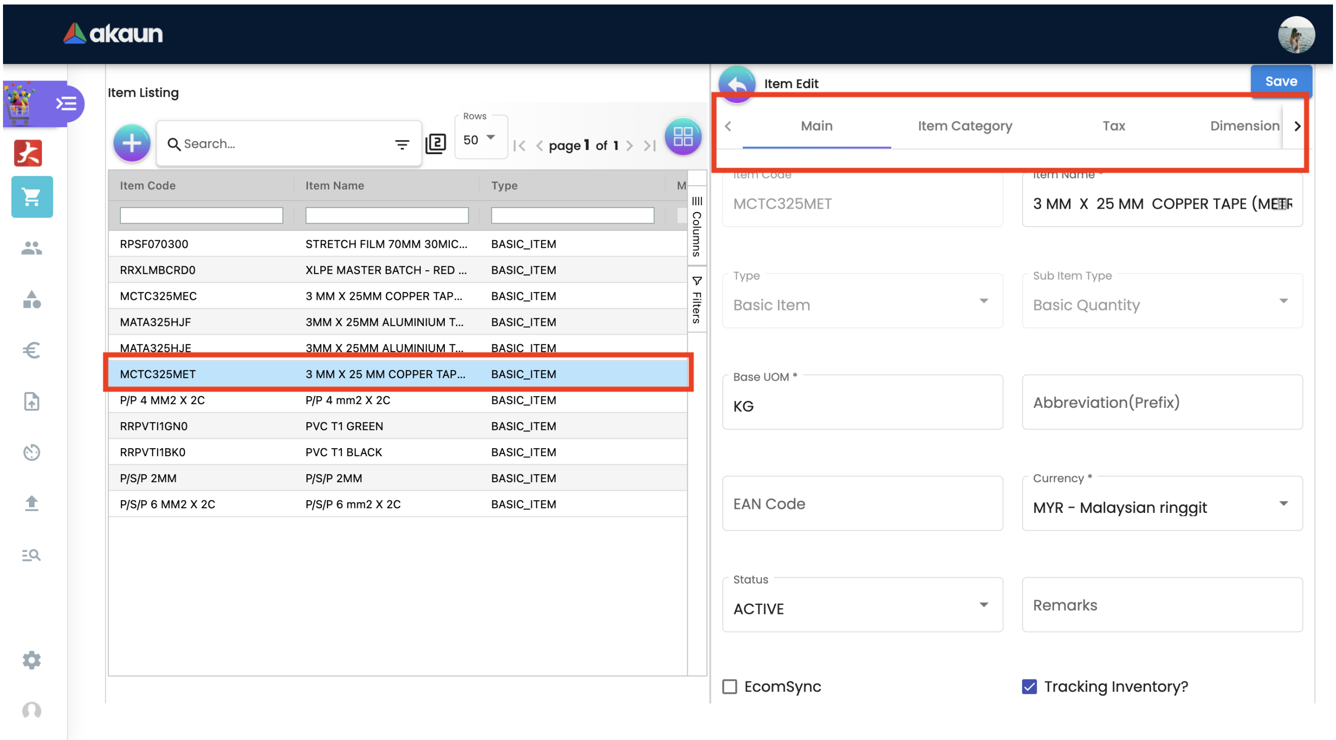
The screenshot above shows the mandatory fields that the user has to fill (except description, as it is not mandatory). Once the item has been created more information can be added in the EDIT ITEM section. Only basic information is required to be filled in the CREATE section and afterwards users can continue editing items in order to add more information at any time. We exclude adding more information in the CREATE section because if there is a lot of information to be added the user might forget to click save. Adding as little information as possible in the CREATE section prevents and/or reduces data being lost.

- Item Code - once Item Code is created it cannot be edited.
- Item Name - Item Name can be edited at any time
- Item type - is consist of nine types as follows:
    - BASIC ITEM - this is the default type that is rel evant to most items.
    - GROUPED ITEM - An item that is part of a group of related products which share common attributes like features, use, production processes etc. It could also sometimes be the market or customer segment in which these products are sold or the prices at which they are offered. When selecting GROUPED ITEM as item type user can add additional child items under EDIT
    - BUNDLE - If the item is a package of two or more stand-alone products sold together for a single price. These units are most commonly called stand-alone products because they are fully functioning products by themselves and can be sold separately to the consumer. Examples can be Laptop Bundles that includes a keyboard and a mouse. Take note that the stock is deducted from CHILD and not PARENT.
    - COUPON - is used to record the Stock In and Stock Out of the vouchers tied to this item. If the user sets the type as coupon the item will be reflected in the VOUCHER MANAGEMENT APPLET.
    - SERVICE - If the item is a basic item without inventory tracking.
    - WARRANTY- a written guarantee, issued to the purchaser of an article by its manufacturer, promising to repair or replace it if necessary within a specified period of time. When selecting warranty as Item type then the additional tab will be shown in the EDIT section where users can input a warranty period. This information can be used in the POS applet when creating Invoices.
    - DOC HEADER ADJUSTMENT - is used to group discounts. This will be used in the POS applet. As an Illustration the user will attach an Item type as “DHA” and name it as “Extra” to Group Discount in POS Applet.
    - MEMBERSHIP - is used to define a member’s attributes, dues payment schedule, and expiration settings.
    - MADE TO ORDER - a manufacturing process where products are assembled and configured according to customer requirements.
- Sub Item Type - There are four sub item types which are Batch Number, Serial Number, Bin Number, Digital Goods. When a user selects any of it, it will be reflected in the POS applet.
- Base UOM - Quantities of warehouse materials (quants) are counted using the base unit of measure (UoM). Quantities in alternative units of measure are always converted to the base unit of measure for calculation purposes. For Example cm, kg, ml

- Item Description - not compulsory
- Remarks - Write your comments
- Currency - Select the currency from the dropdown list

Once all required fields are filled up, user can press on CREATE, so the item will be saved into database and can be proceed to be edited

A.8.3.2. ITEMS EDIT



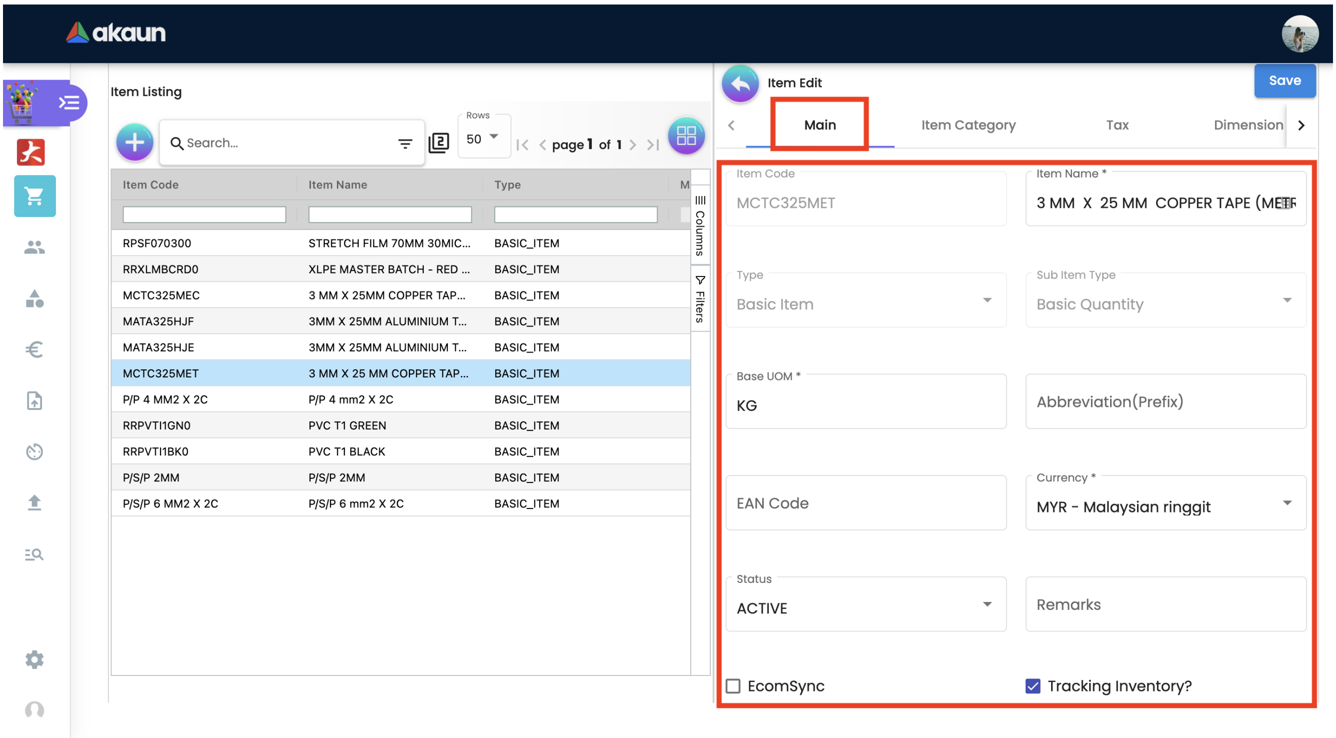
Once the user creates an Item, it will appear in the listing. When the user wants to update the item or add more information they can click on the Item itself, a 2nd container will pop up once clicked containing the following tabs:

- Main Tab
- Item Category Tab
- Tax Tab
- Dimension Details Tab
- Multi UOM Tab
- Branch Linking Tab
- Company Linking Tab
- PNS Settlement Method Tab
- Pricing Scheme Tab
- Manage Image Tab
- Entity Pricing Tab
- T2T Item Mapping Tab

- Marketplace Tab
- Stock Availability Tab
- Attribute Set Tab
- Pages Tab
- Reviews Tab

The information provided can be used in transactional Applets. Please take note that additional tabs may appear if the user chooses Grouped or Bundle as Item type

MAIN TAB



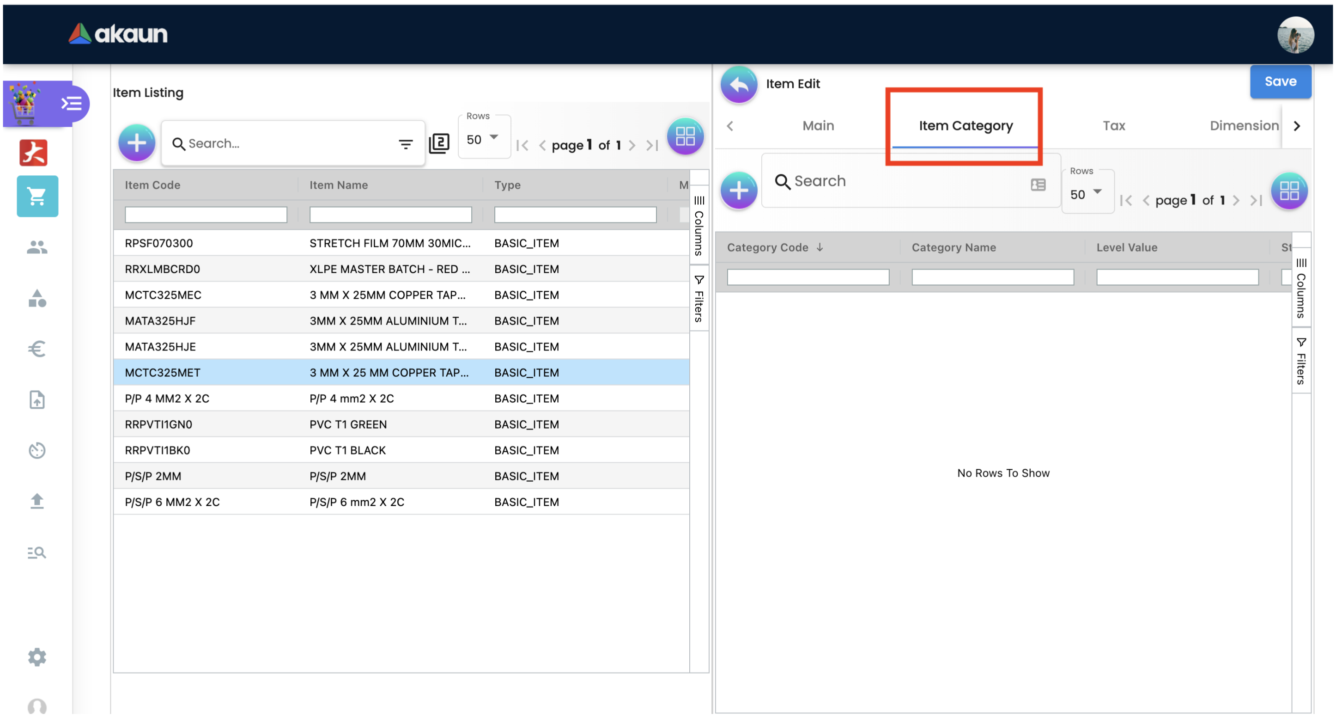
This Tab consists of general Item information such as:

- Item Name - can be updated any time
- Item Code - cannot be updated
- Item Type - cannot be updated
- Sub Item Type - used when items are in a batch or has a serial number
- GL Code - The general ledger is an accounting document that provides a general overview of an organization's financial transactions. An account, or general ledger (GL) code, is a number used to record business transactions in the general ledger
- Base UOM - an amount in which the stock of a material is managed for example ml, kg, min
- Abbreviation (Prefix) - is used in voucher applet, in order to make it easier to view a specific group of items
- EAN Code - The International Article Number is a standard describing a barcode symbology and numbering system used in global trade to identify a specific retail product type, in a specific packaging configuration, from a specific manufacturer.

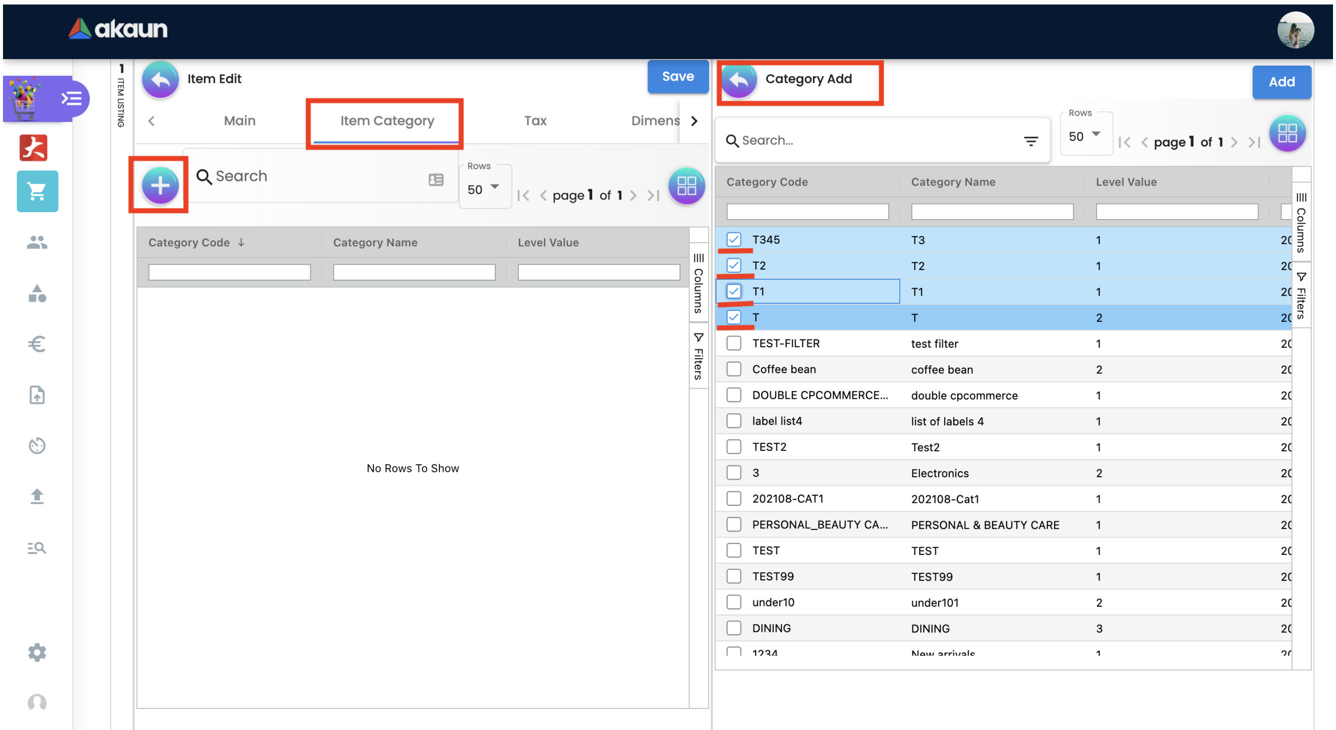
- Currency - a system of money in general used in a particular country. For example, USD ,MYR
- Status - to specify whether an item is active , inactive or obsolete
- Remarks - Write your comments
- Summary - shows who created the item or who updated the item, also shows the date modified and created

ITEM CATEGORY

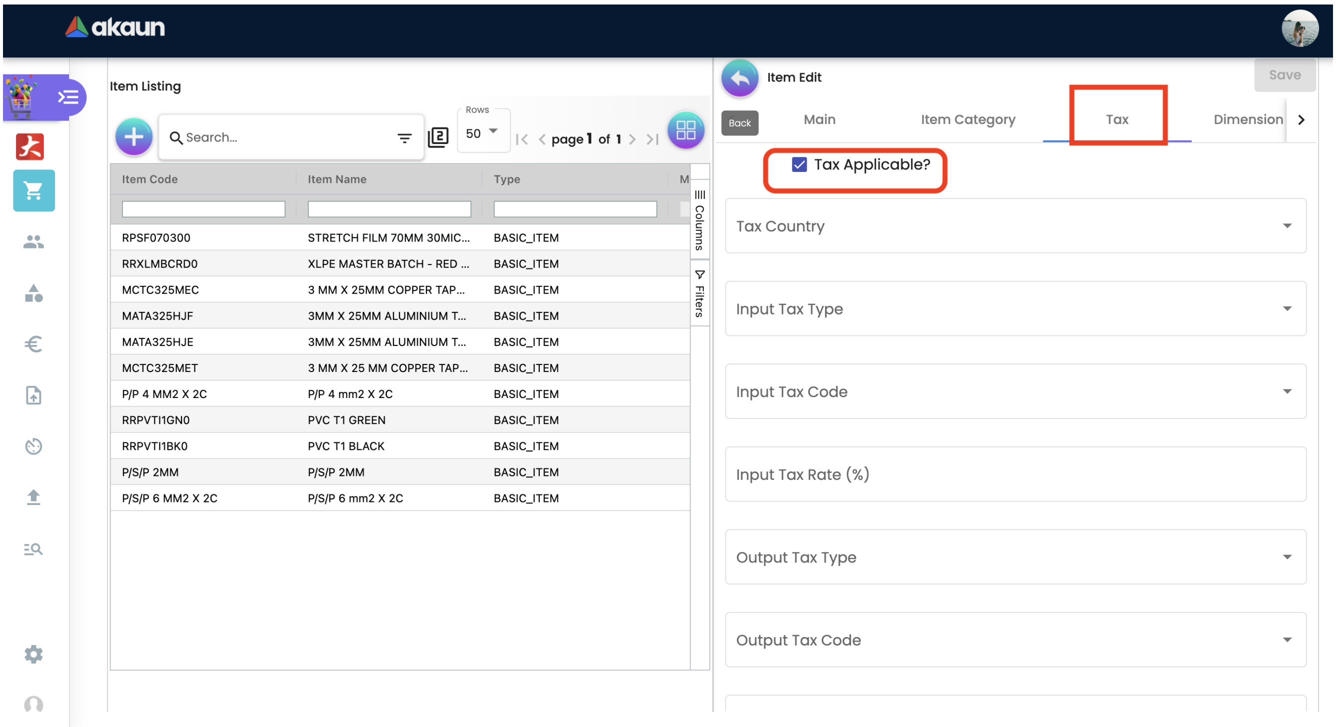
Item category tab is used to link a category to the item. Categories can be created in the “Category” module.



In order to add the category click “+”. Once clicked the 3rd container with category listings will be shown. Users can select any category that applies to the Item.



TAX TAB

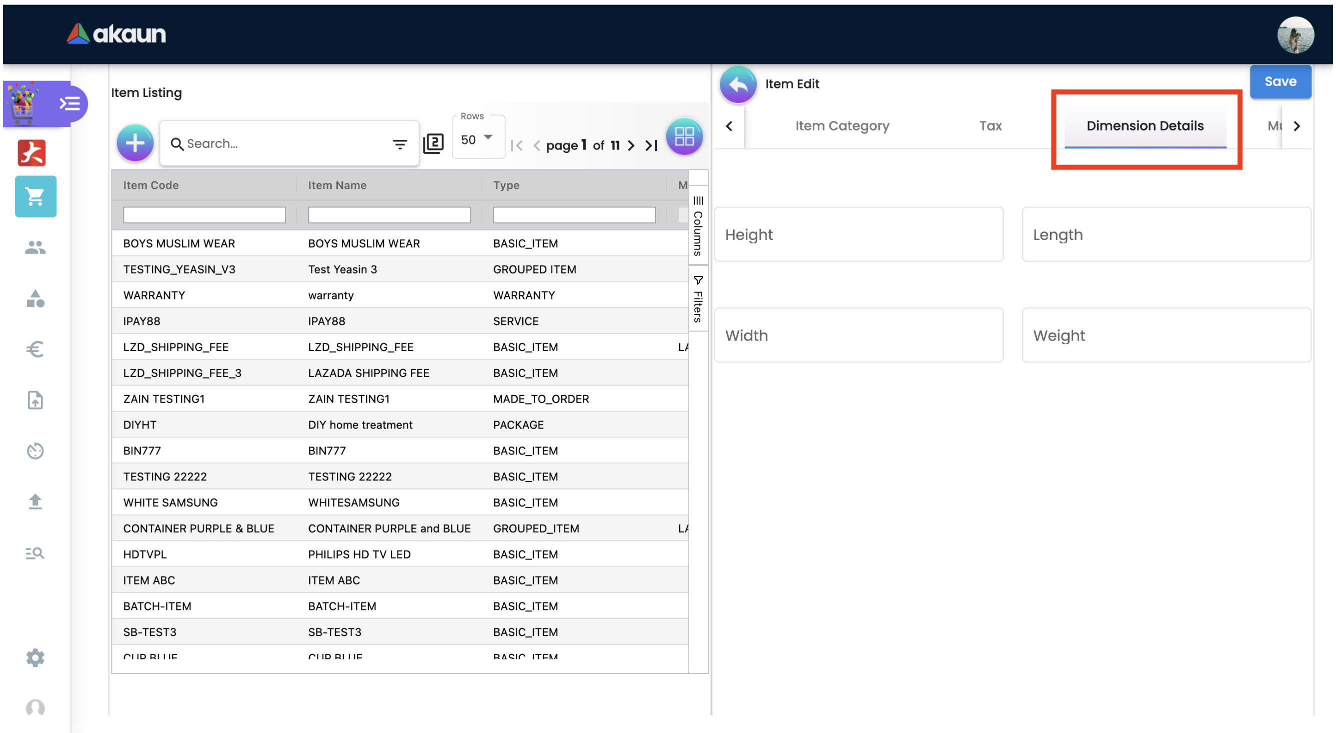


If tax is applicable the user can tick the checkbox. Once ticked the the tax information will appear where the user can set the tax for:

- Tax Country
- Output Tax
- Input Tax
- Withholding tax

DIMENSION DETAILS TAB

Product dimentions to fill in

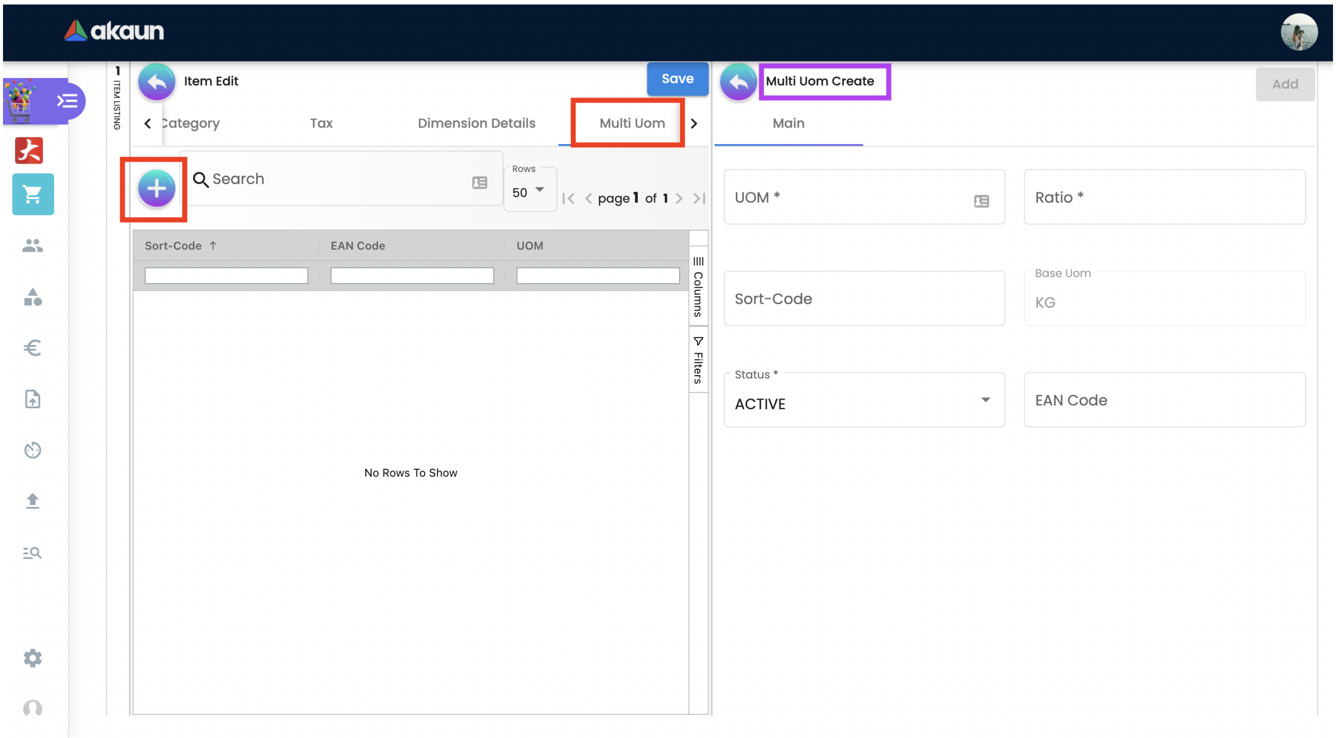


MULTI UOM TAB

This module allows to stock items with multiple units of measurement, UOM auto conversion, and multiple UOM reports that can be later used in transactional applets, sample of Multi UOM;

- 1 Box = 12 Packs
- 1 Packs = 10 Strips
- 1 Strips = 10 Tablets

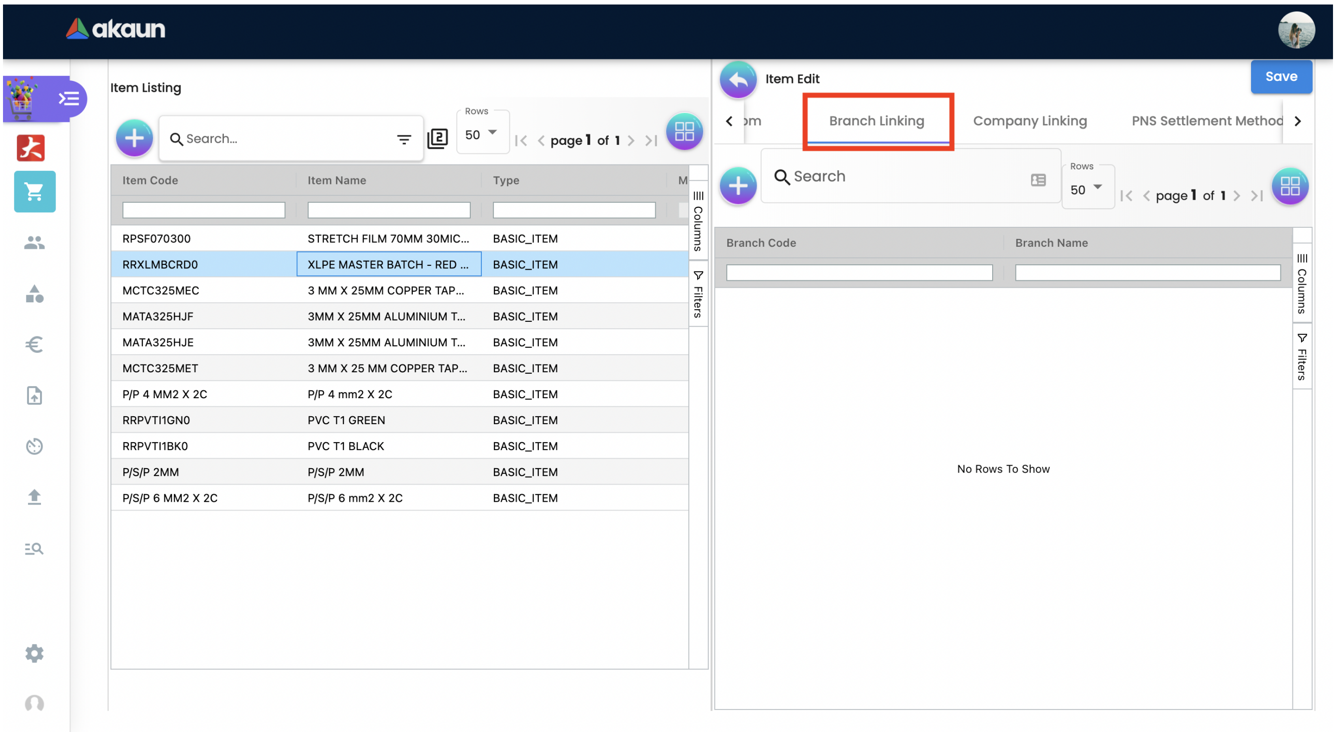
In order to add Multi UOM click “+”. Once clicked it will open a 3rd container for the user to add UOM details



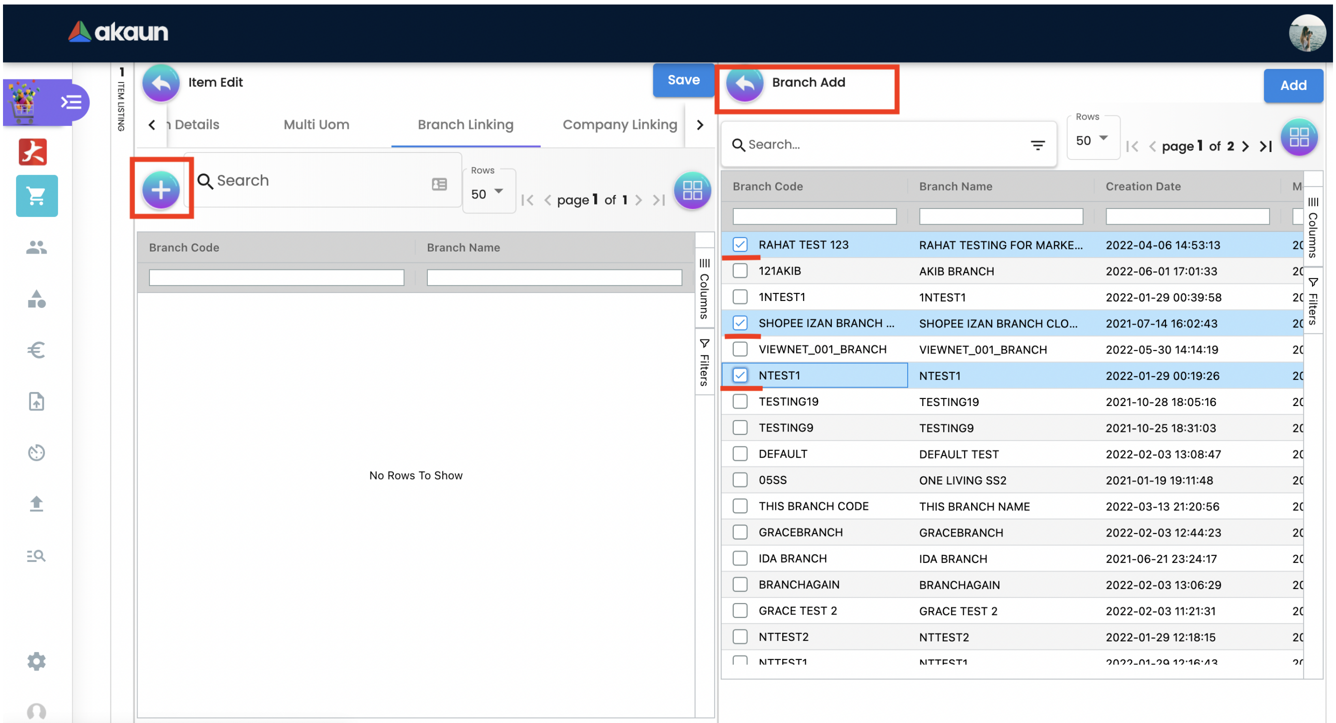
- UOM - Unit of Measure. UOMs are used to quantify the inventory items and enables items to be tracked easily.
- Ratio - used to specify how many items. For example:
  - if base UOM is = “Bottle”, then ratio = 20 bottles
- Status - to specify whether the item is active or inactive
- Base UOM - unable to edit. User may edit it in the Main Details Tab
- Sort-Code - The sort code helps identify the hierarchy of the UOM from the smallest to largest starting from 001. For example pill would be 001 followed by carton which would be 002 and finally box which would be 003.

BRANCH LINKING

Used to link specific branches. This function will be used in all transactional applets. for example if a user links branch A and B then only these respective branches will be able to see the selected item in the POS applet. Branches can be created in the Organization applet.

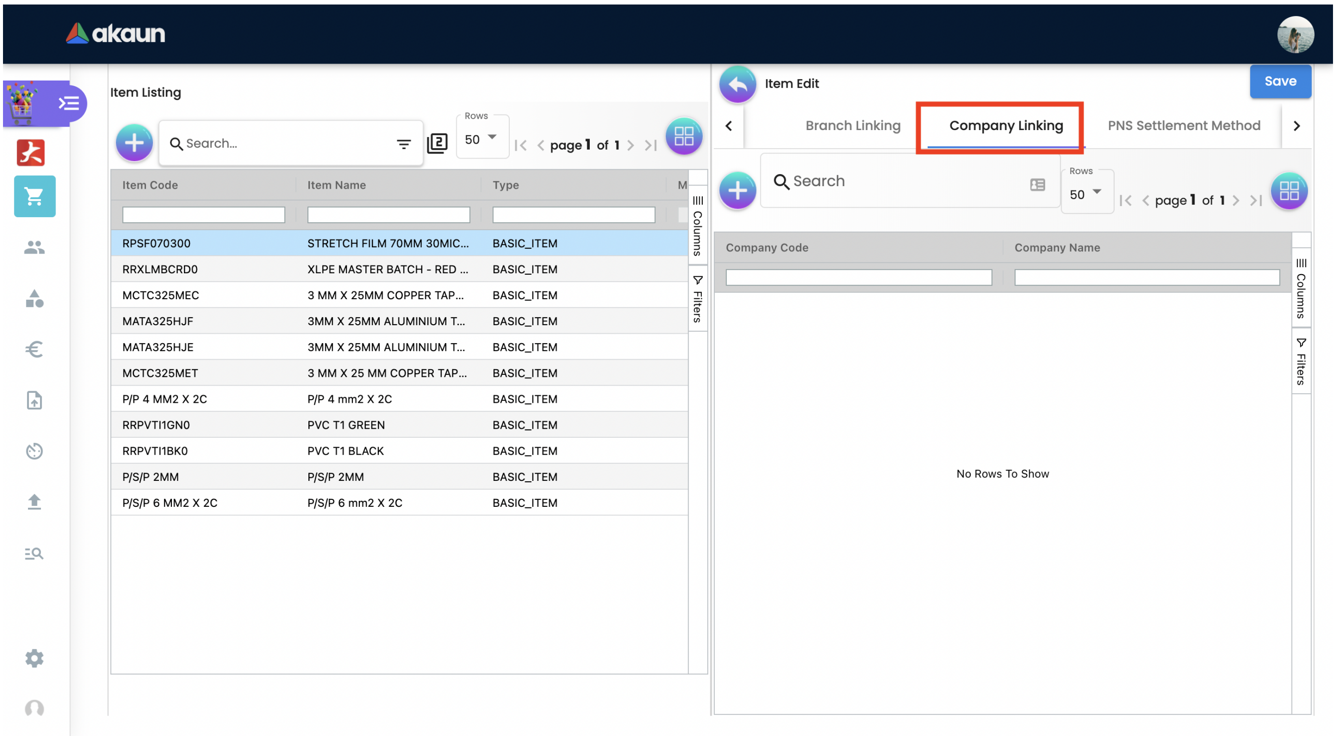


In Order to add a branch click “+”. Once clicked it will open a 3rd container for users to view listings of all branches where the user can select the preferred branches:

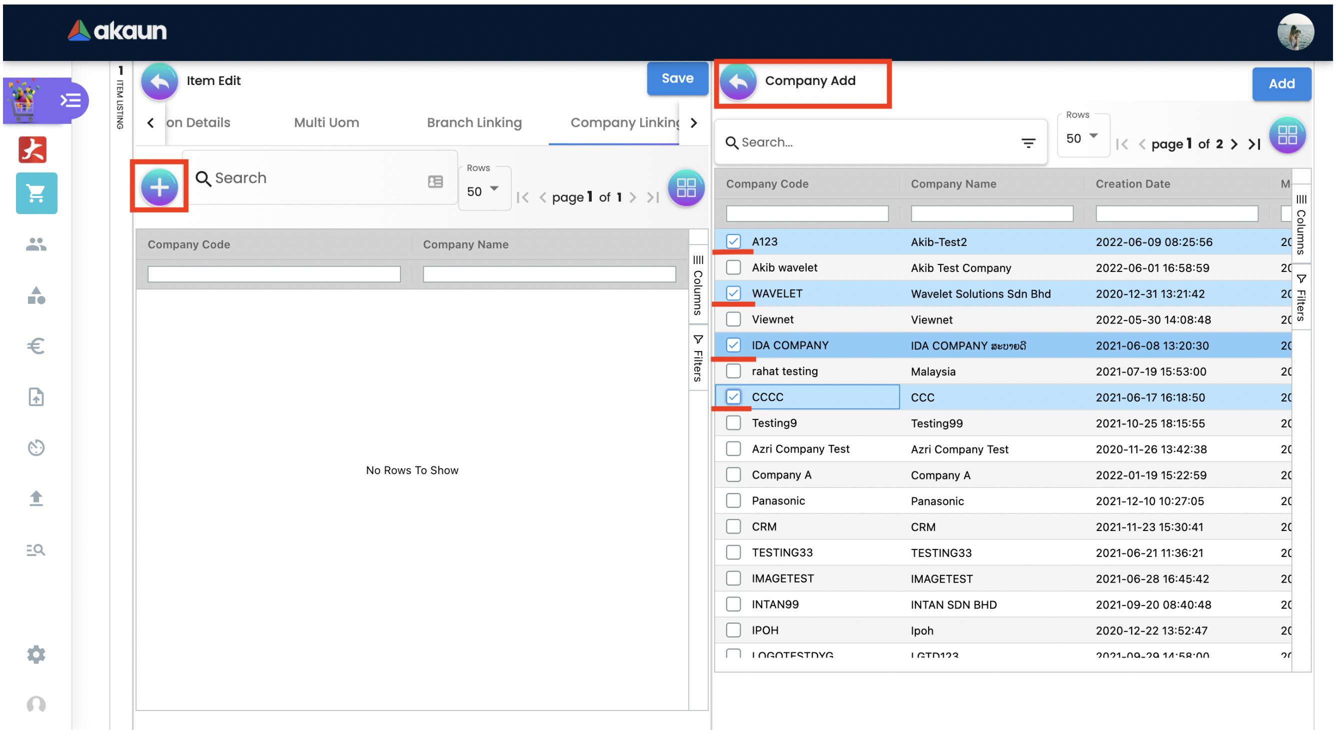


COMPANY LINKING

Used to link companies. Companies can be created in the Organization applet. When linking a company the item will be visible for all branches that are under the chosen Company.



In Order to add a company click “+”. Once clicked it will open a 3rd container for users to view listings of all companies. Here the user can select the preferred company.

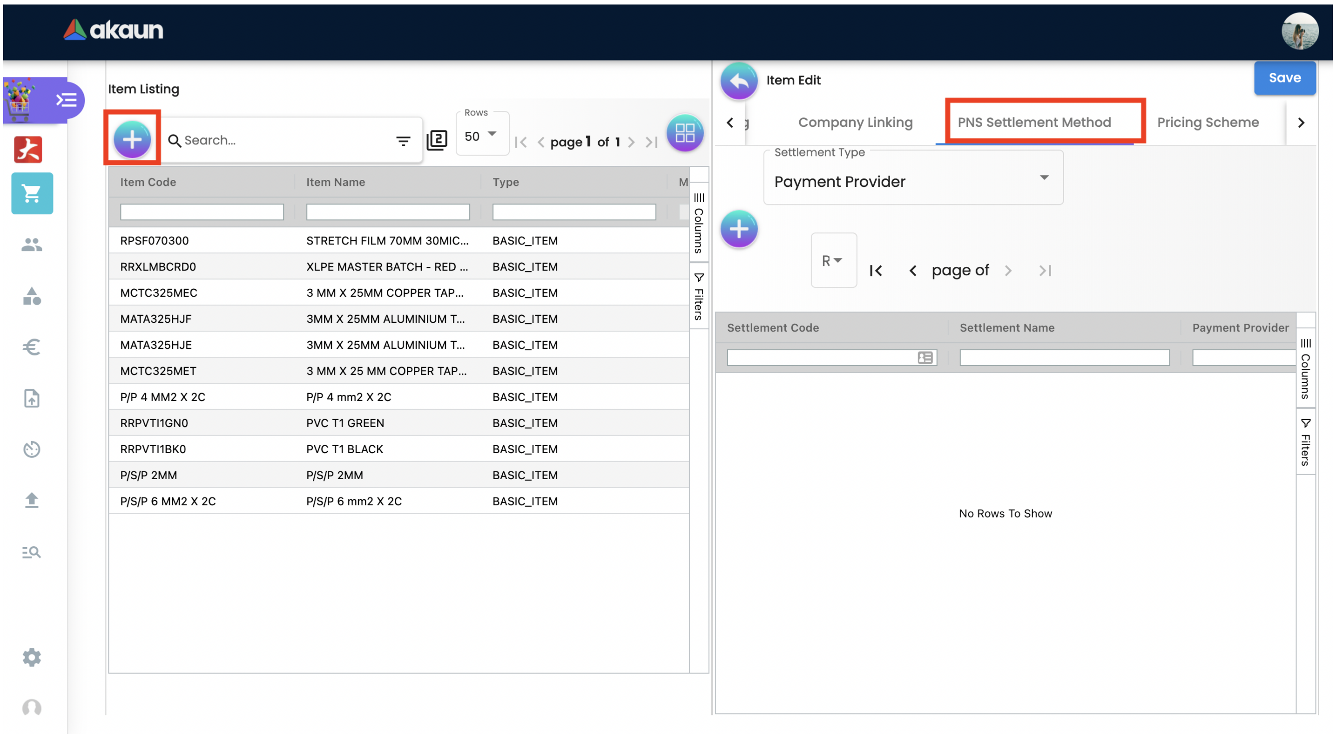


Note: if the user links company A and it has been linked to 5 BRANCHES but in Branch linking TAB the user only chooses 2 branches, then the item will be visible to ALL BRANCHES THAT IS LINKED UNDER THE COMPANY. If the user wants to link only specific branches then it needs to be chosen in the BRANCH LINKING TAB ONLY and COMPANY LINKING should remain empty.

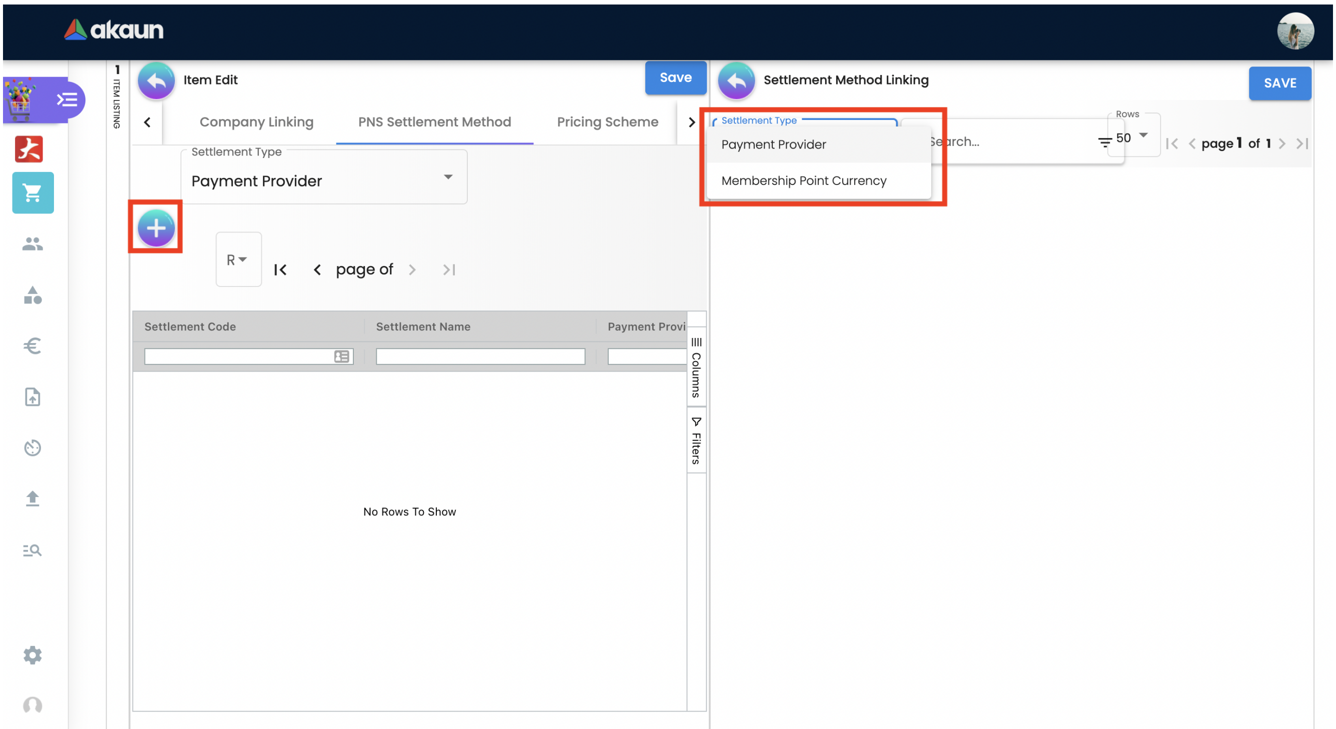
PNS SETTLEMENT METHOD TAB

PNS Settlement Method module is used to link Product to PNS (Products and Services) Settlement Method.

- There is dropdown list, where the user selects the Settlement Type:
    - Payment Provider
    - Membership Point Currency

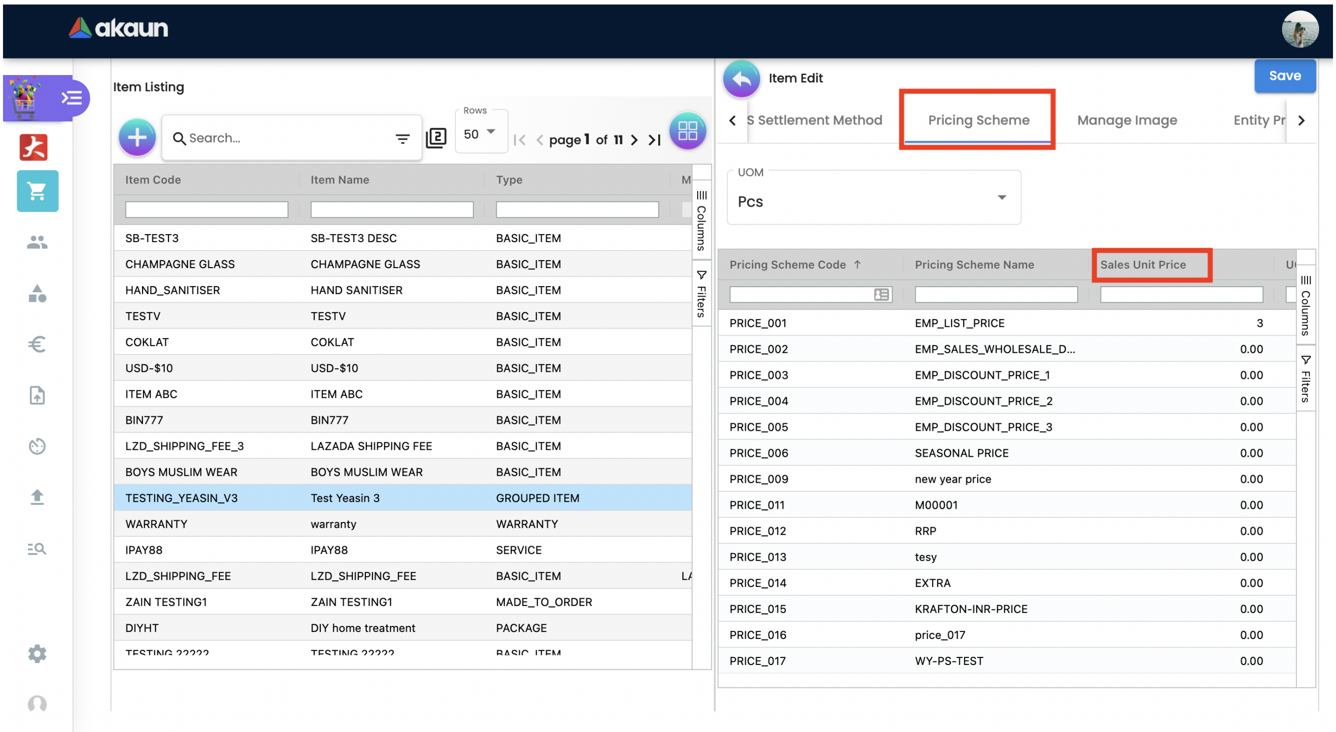


In Order to add a Settlement Method click "+". Once clicked it will open a 3rd container for users to choose settlement type. Here the user can select the preferred type.

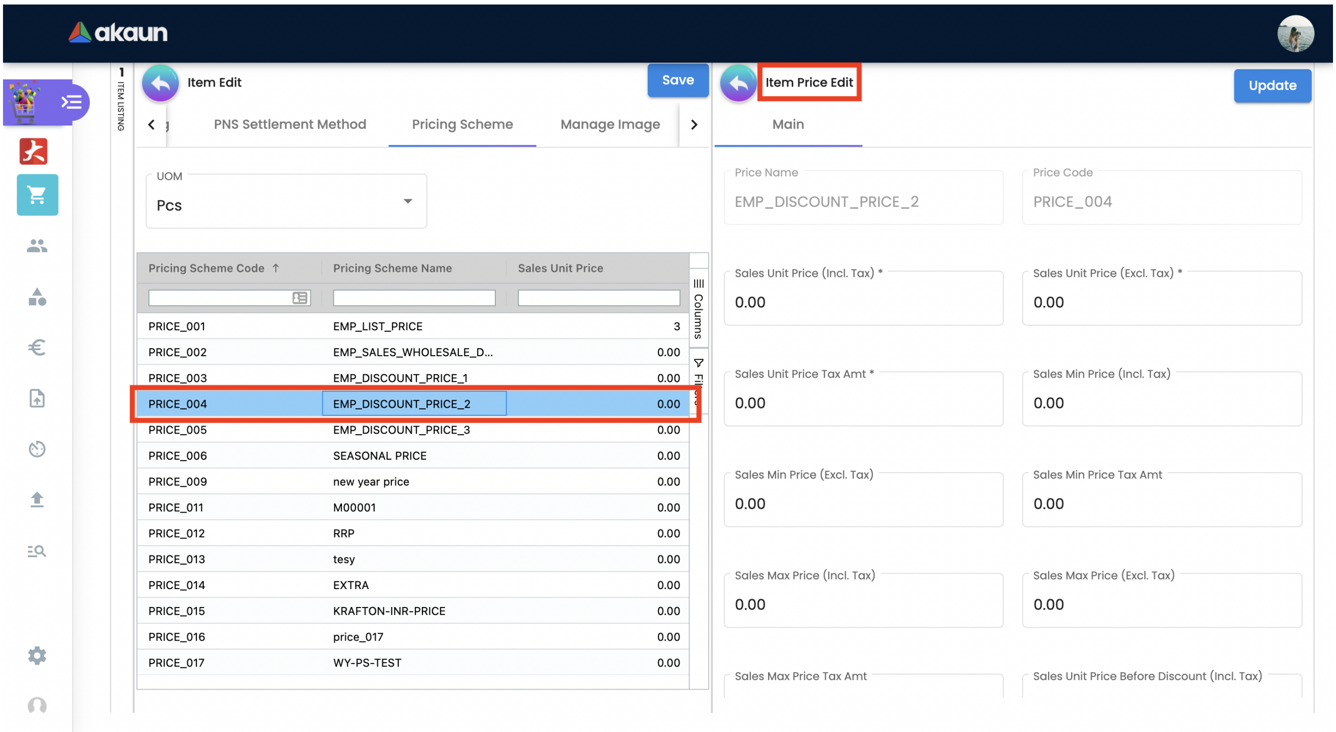


PRICING SCHEME

The Pricing Scheme template is added in the PRICING SCHEME module, in this tab users can add a unit price for existing pricing scheme templates. Once added this information can be used in transactional applets.



In Order to edit the price, click the item and it will open 3rd container for users to edit Unit Price.



MANAGE IMAGE TAB

This tab is used to add and categorize images based on its type for example main image, promotional image or additional image. Users may update the period of the images they are going to be using as a reference, it has no functionality. Images may also be used in Ecomsync applet, CP Commerce applet and transactional applets such as POS and GRN. However, the date is only for user reference and is not meant to perform any actions.

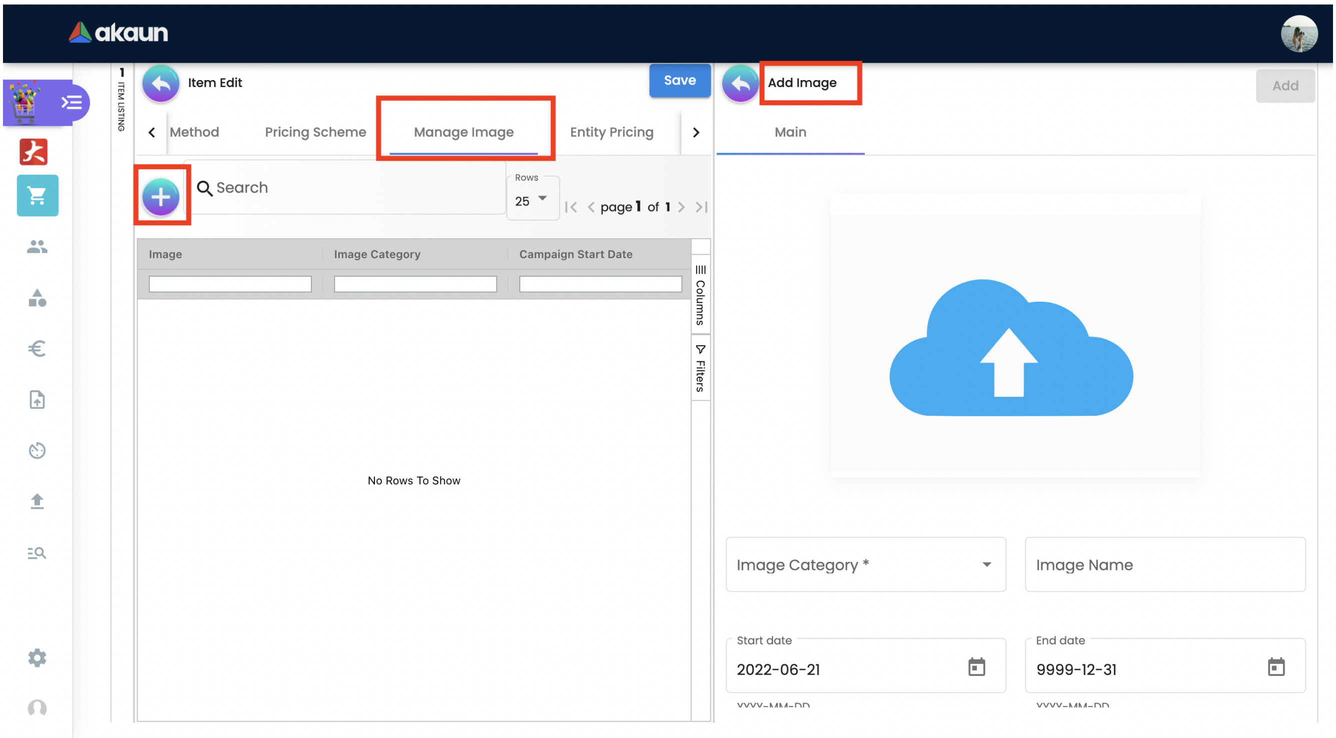
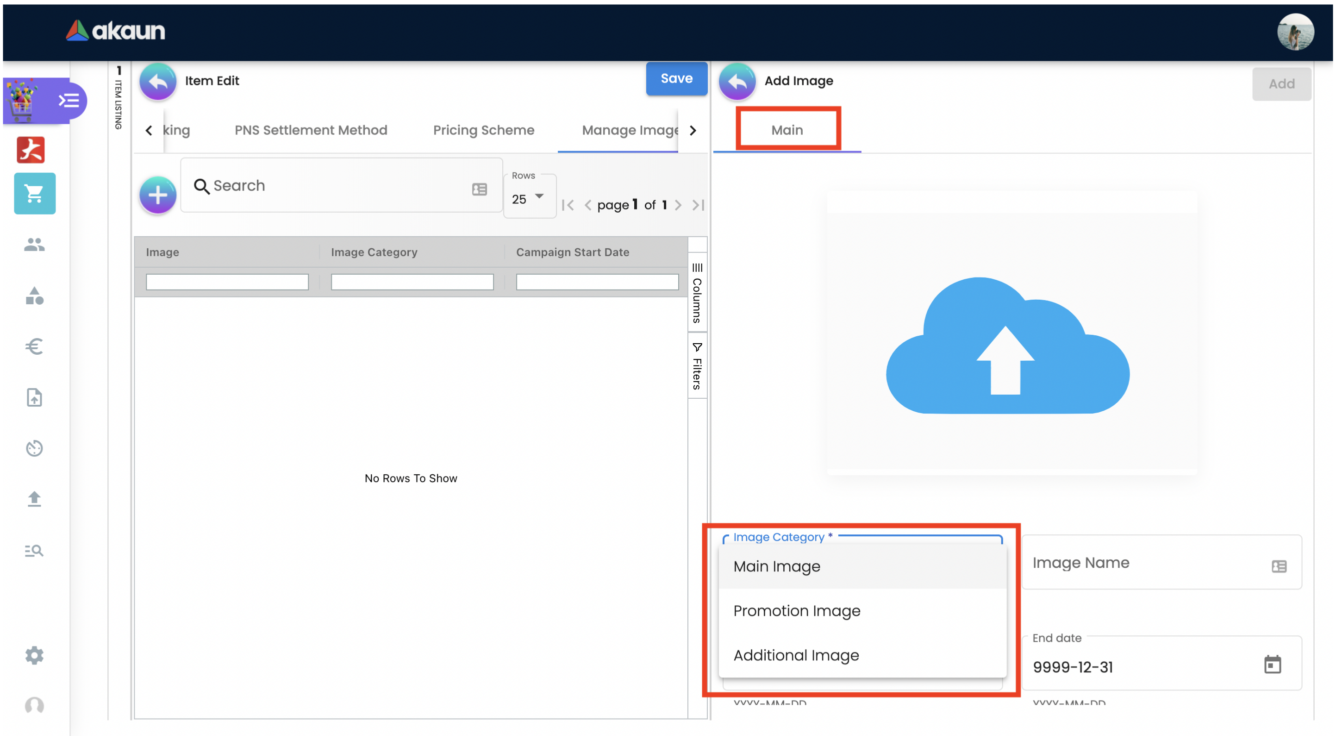


Image type is based on ecommerce requirements. There are three image types such as:

- Main Image - the image that is supposed to be displayed in the marketplace. Setting Image type is only for user's reference and a library. When syncing the item, the user has to manually select the image they wish to sync to the marketplace under attribute details.
- Promotional Image - when there are certain promotions, some users might need to use special images related to the promotion, it will replace the main image. Setting Image type is only for the user's reference and the library. When syncing the item, the user has to manually select the image they wish to sync to the marketplace under attribute details.
- Additional image - images that end users can view when they view full item information.

As an illustration:

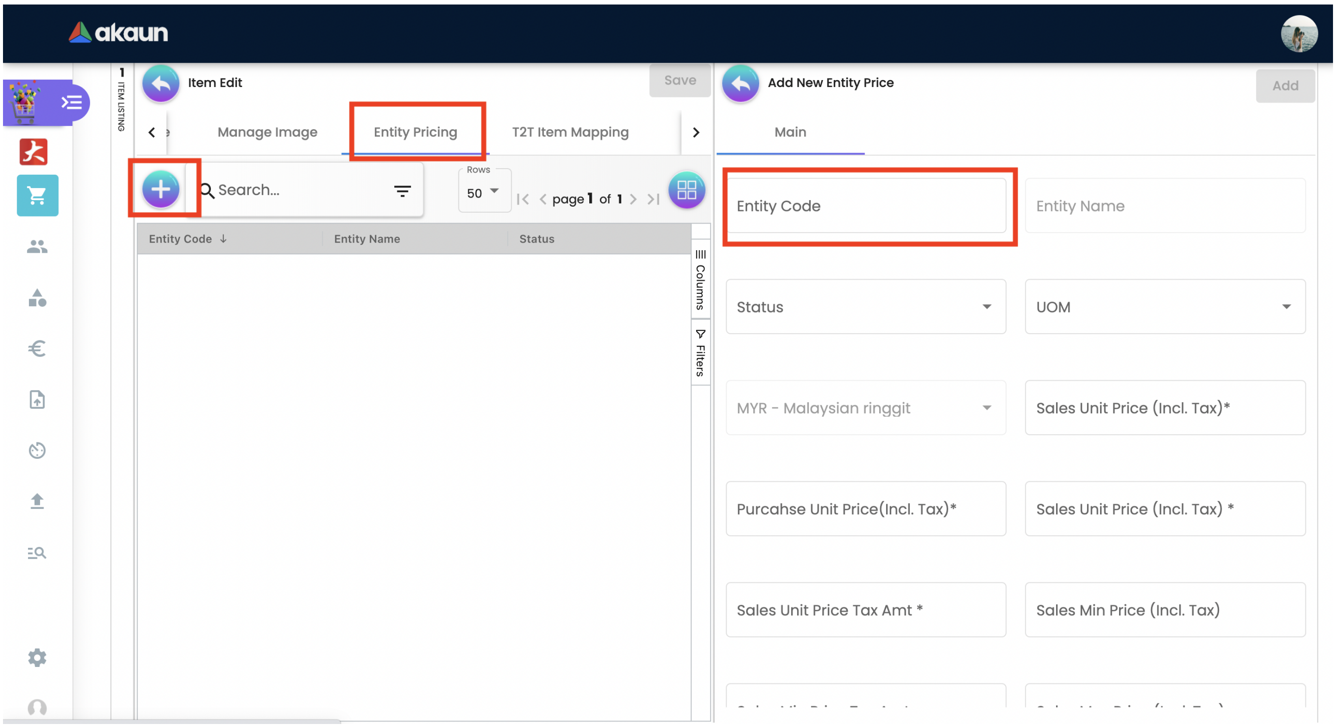
- Item = Samsung Phone
  - Main Image = the image of Samsung phone
  - Promotional Image = a themed image (based on the occasion) of Samsung phone eg. Christmas sale
  - Additional images = images of Samsung phone in a different angles, the box, or additional items inside the box



ENTITY PRICING

Entity Pricing module is used to set the price for the Product depending on the Entity. For instance: A single product's price is individual for different Entities.

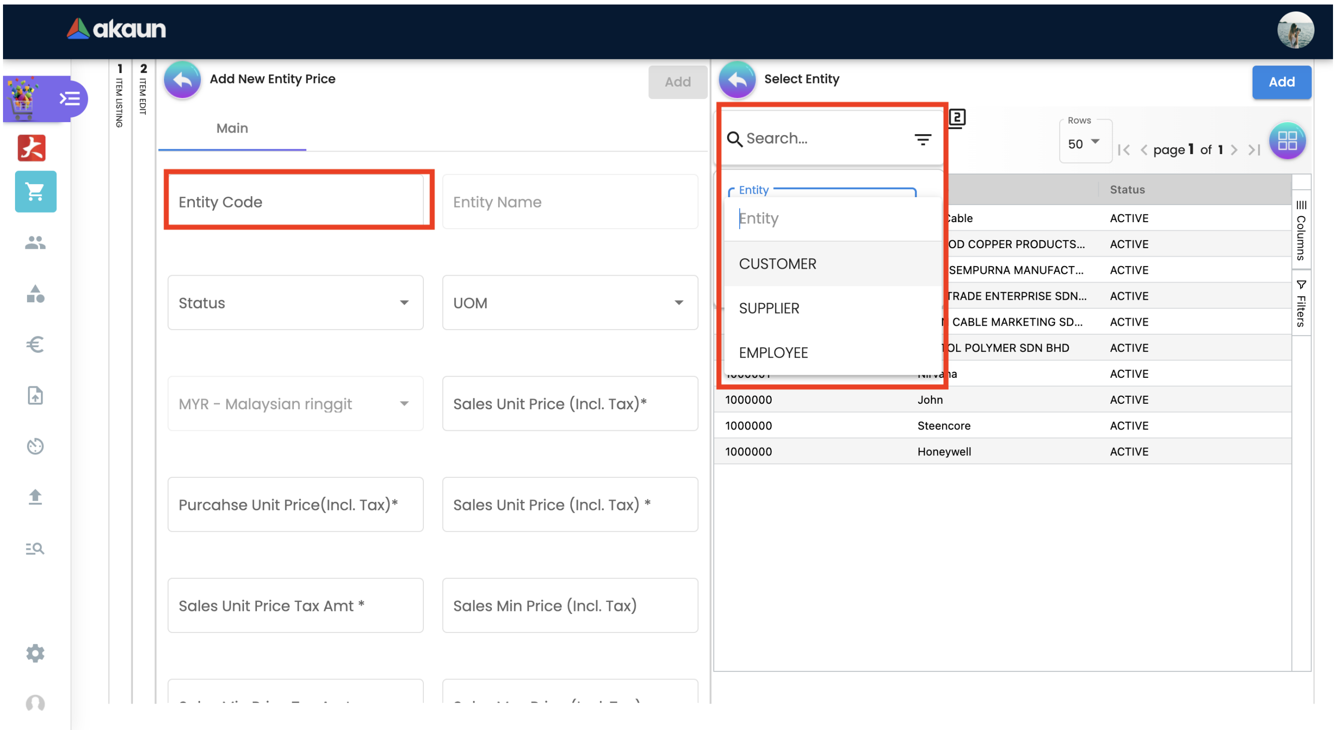
In Order to add a Entity Price click "+". It will open 3rd container for users to create the Price. Then click "Entity Code" to choose entity type.



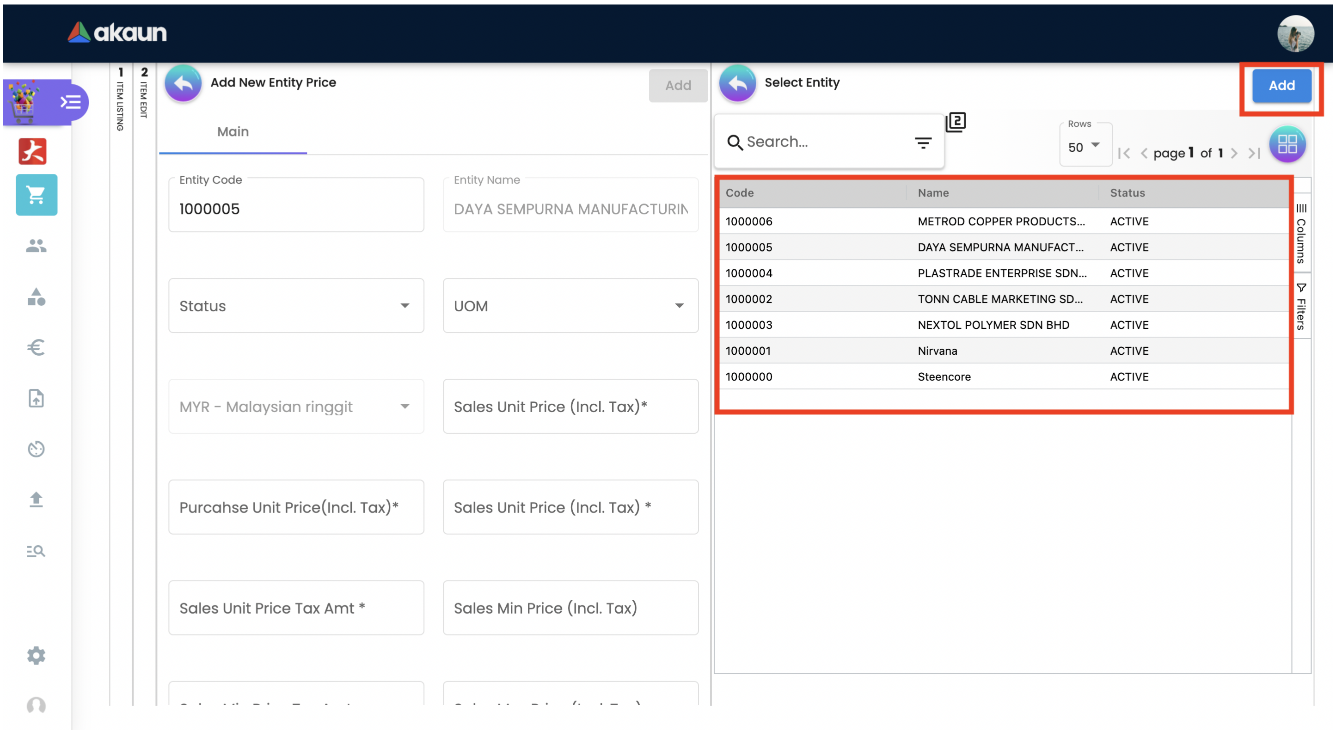
Select the Entity type from advanced search. There are three types of Entity to select:

- Customer
- Supplier

- Employee

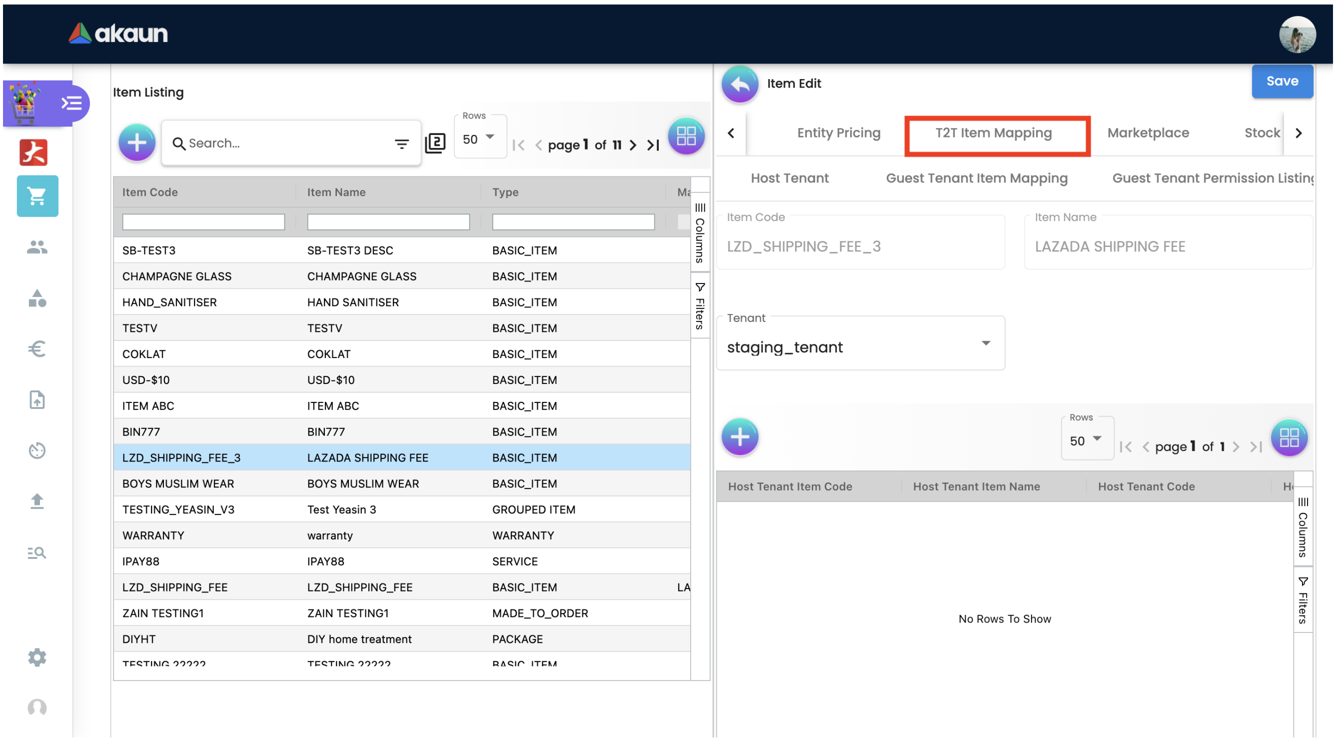


After selecting the Entity, click on the Item and it will automatically leads the user to the previous page filled in with the Entity Code and Entity Name. In this page user set the price for selected Entity.



T2T ITEM MAPPING TAB

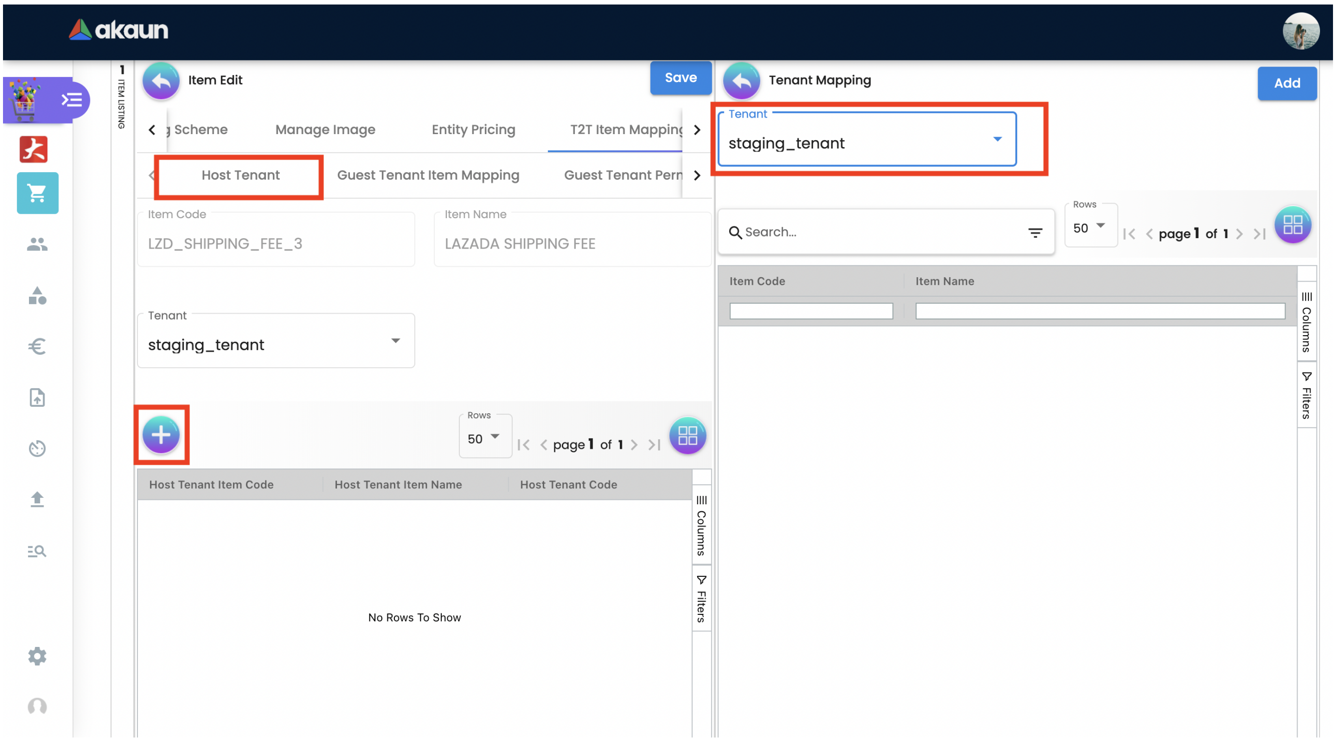
Tenant to Tenant Item Mapping module is used to map Companies, Product Codes and Names in order to sync transactions



T2T Item Mapping tab includes three tabs as follows:

- Host Tenant
  - Main tab where the Mapping of the items is processed
- Guest Tenant Item Mapping
  - A list of Tenants which are already Mapped
- Guest Tenant Permission Listing
  - A list of Tenants which permission is given for mapping. All the Permissions are given from the T2T Admin applet

In order to do the mapping, click "+" button, it will lead the user to the new page, where the user select the Tenant from dropdown list and add the item.

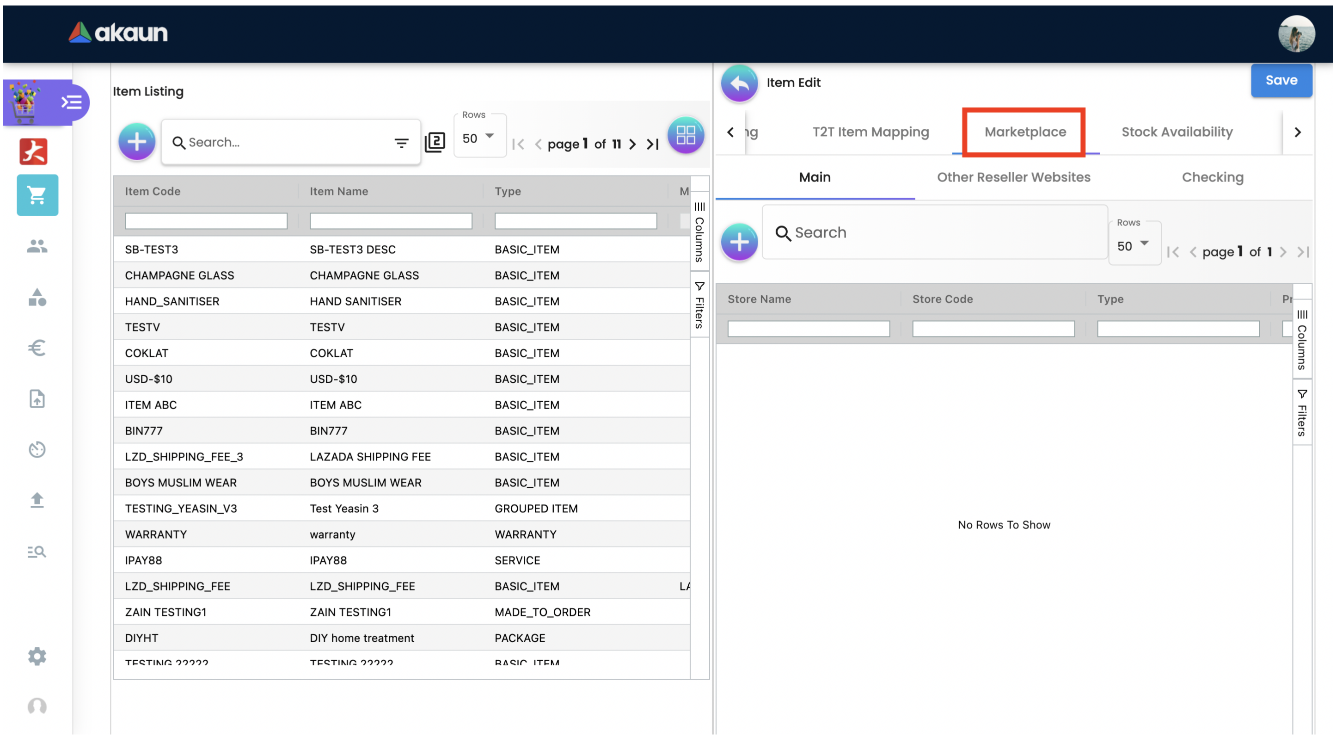


MARKETPLACE TAB

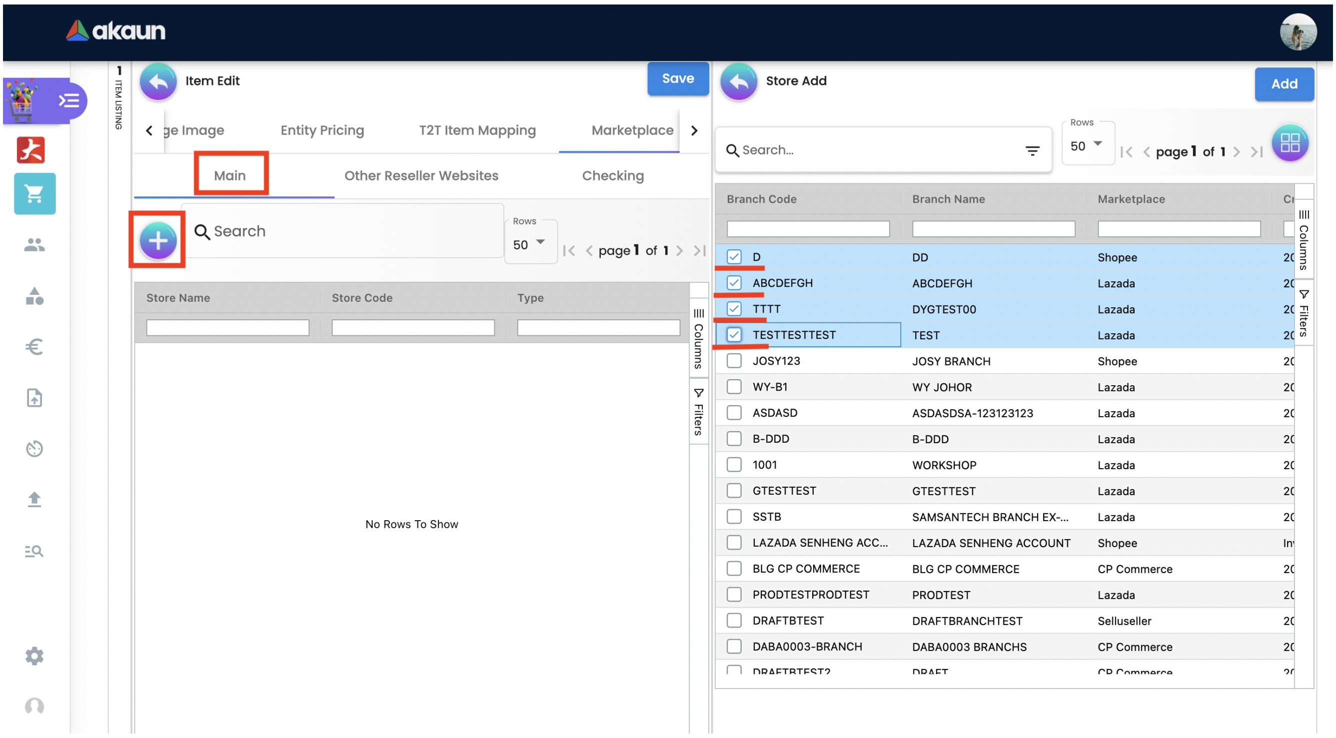
Marketplace Tab is used to list the products on multiple marketplaces. So the user can sell one product in various stores.

Marketplace tab includes three more tabs to do all the configurations:

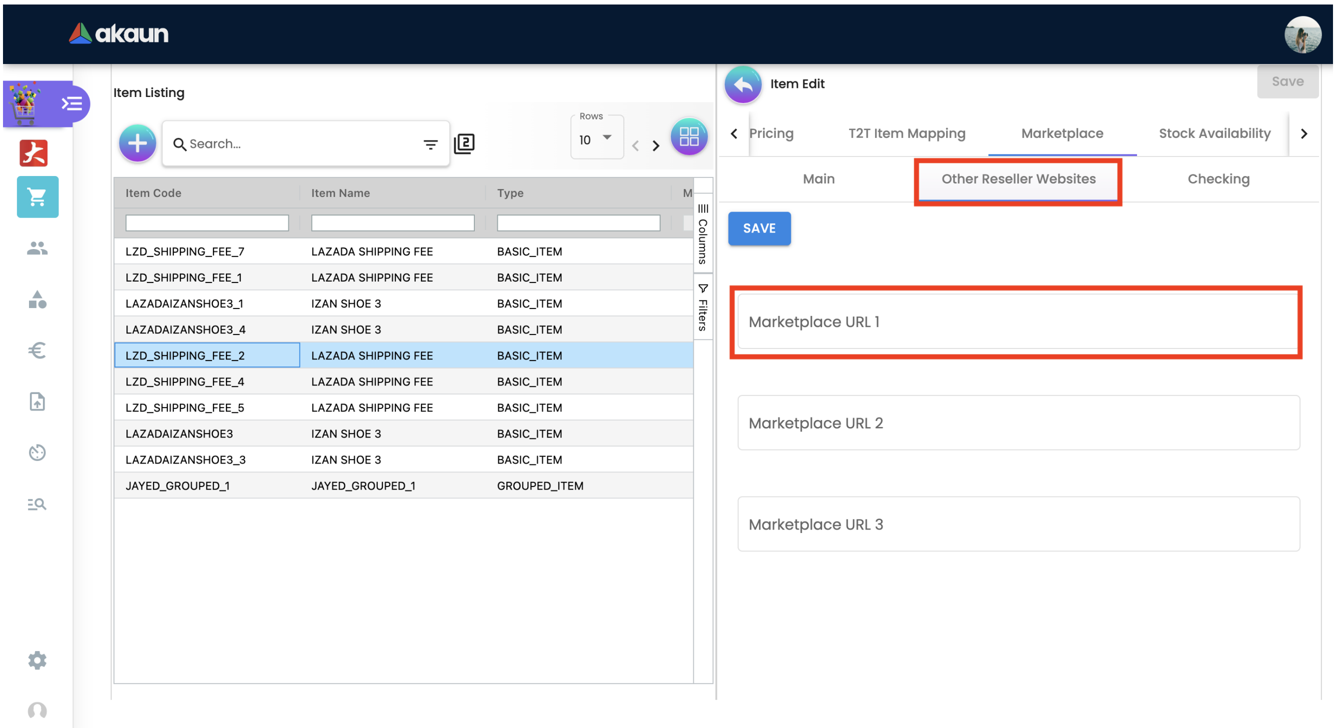
- Main
- Other Resellers Website
- Checking



Users select and add the Stores by clicking the "+" button in the Main Tab

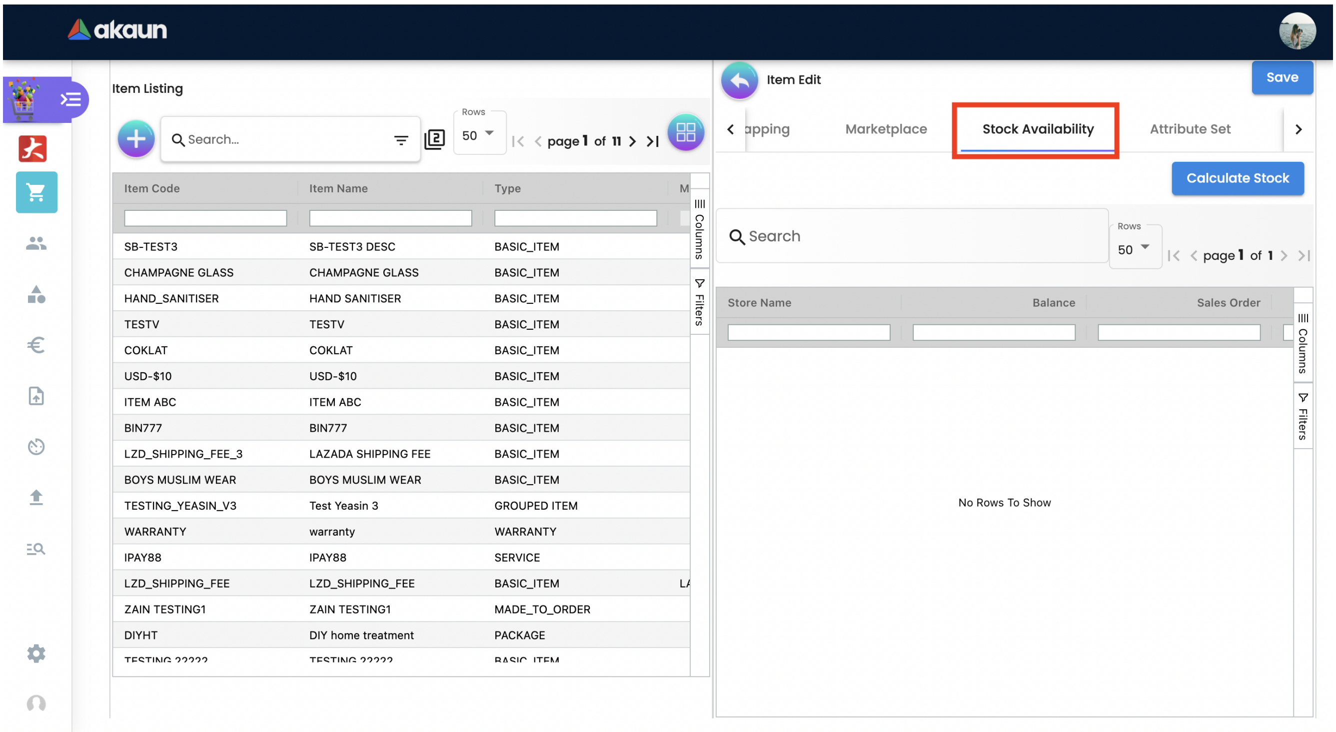


- Other Resellers Tab
    - This tab used if there are resellers who are distributing your products and selling them in other different Marketplaces. Fill in the URL of the Marketplace they use.

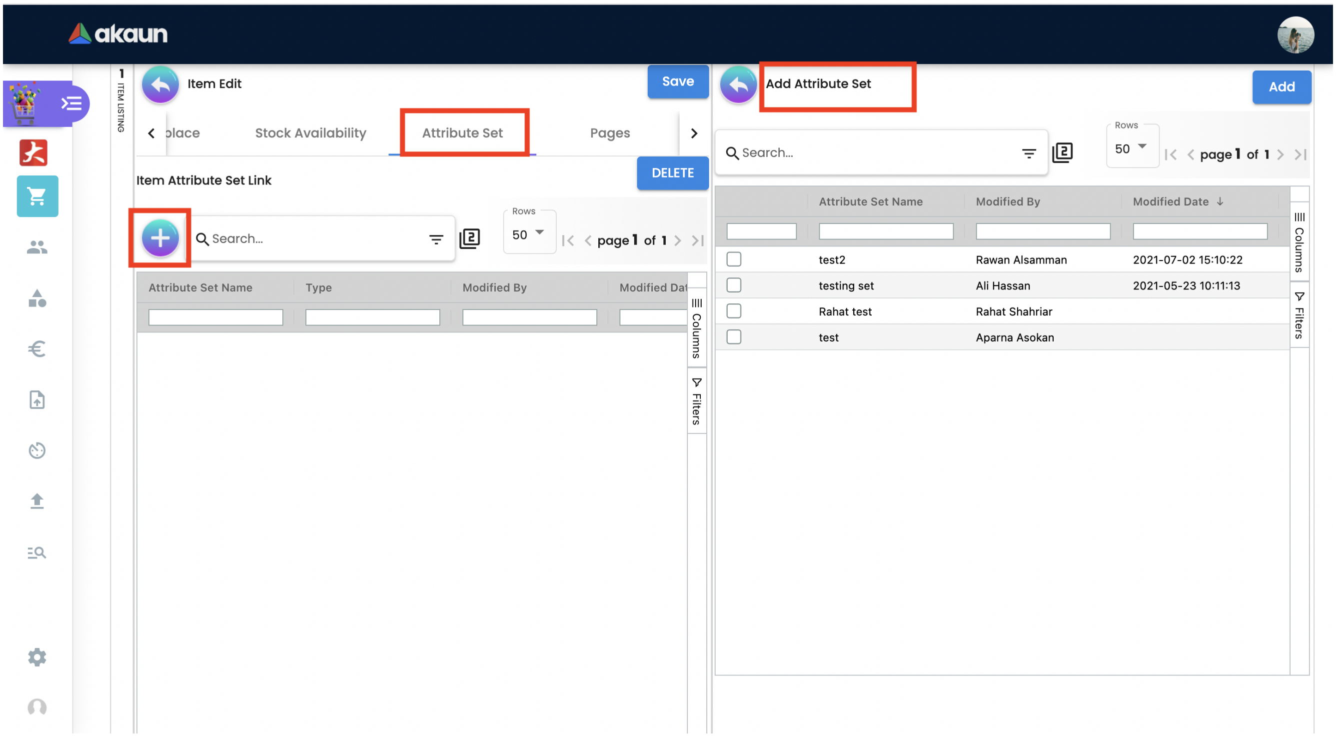


- Checking Tab is for the reports shown from the Ecomsync applet.

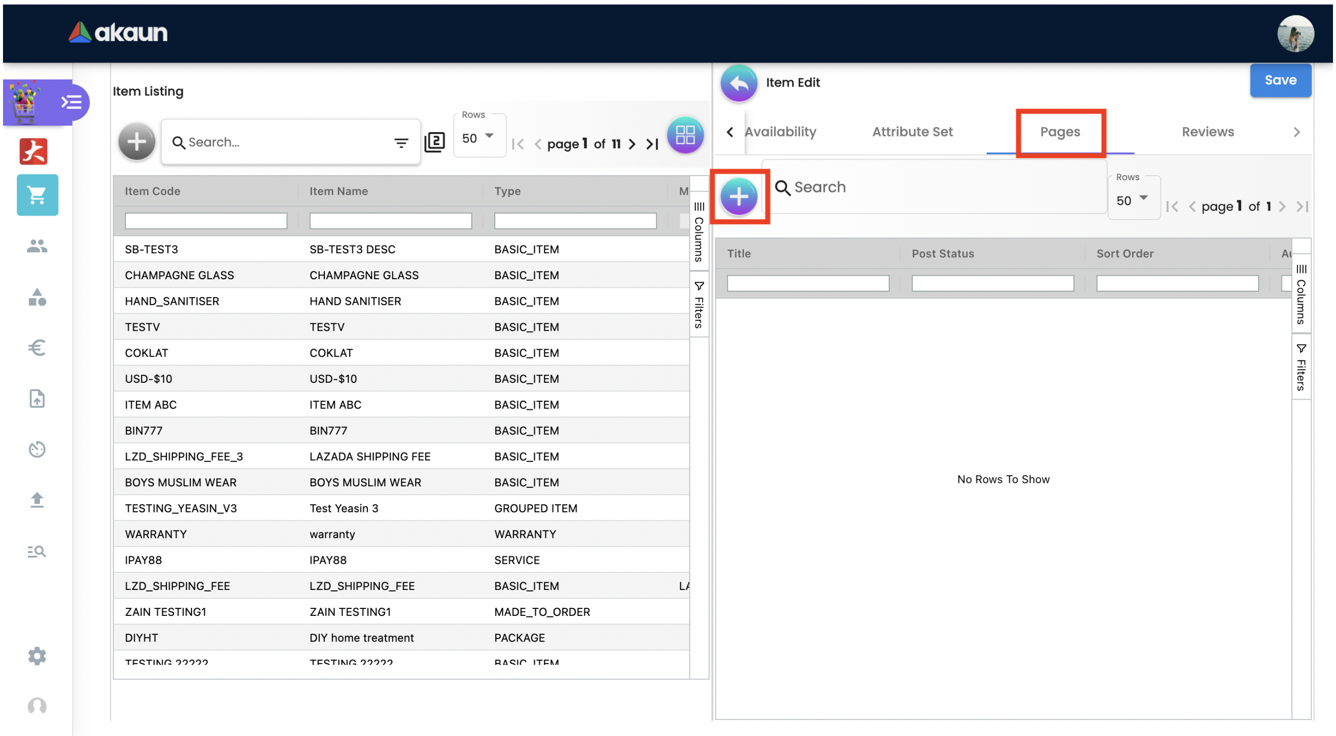
```
=== STOCK AVAILABILITY TAB
```



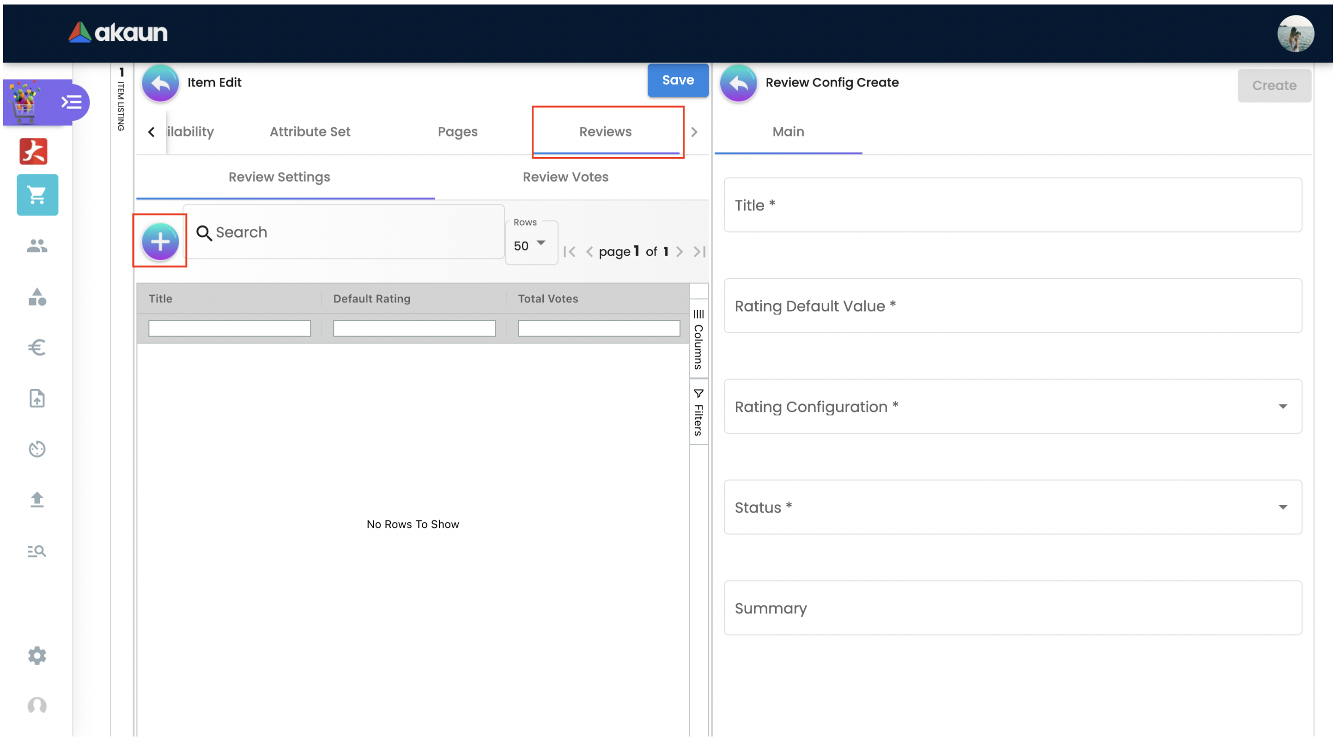
ATTRIBUTE SET TAB



PAGES TAB

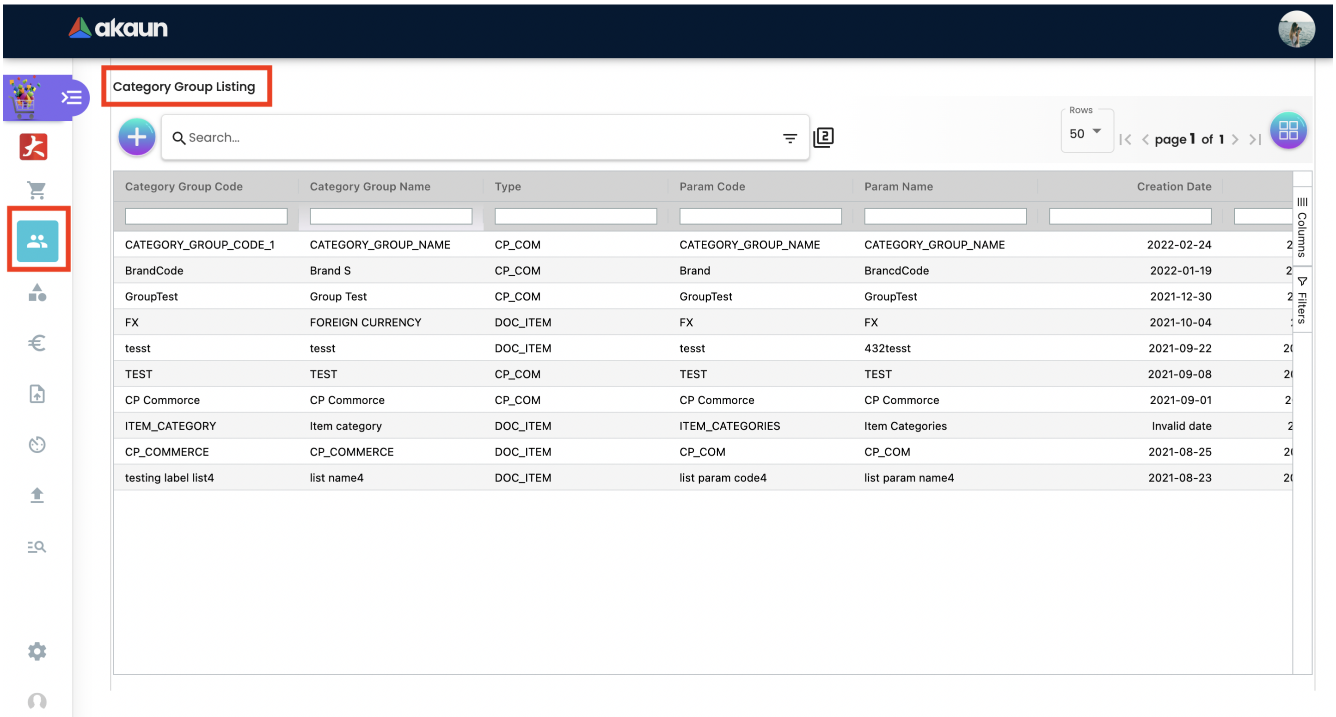


REVIEWS TAB



A.8.4. Menu 02 - Category Groups

Every category is linked to the Category Group. Category Group Tab is used for organizing categories.

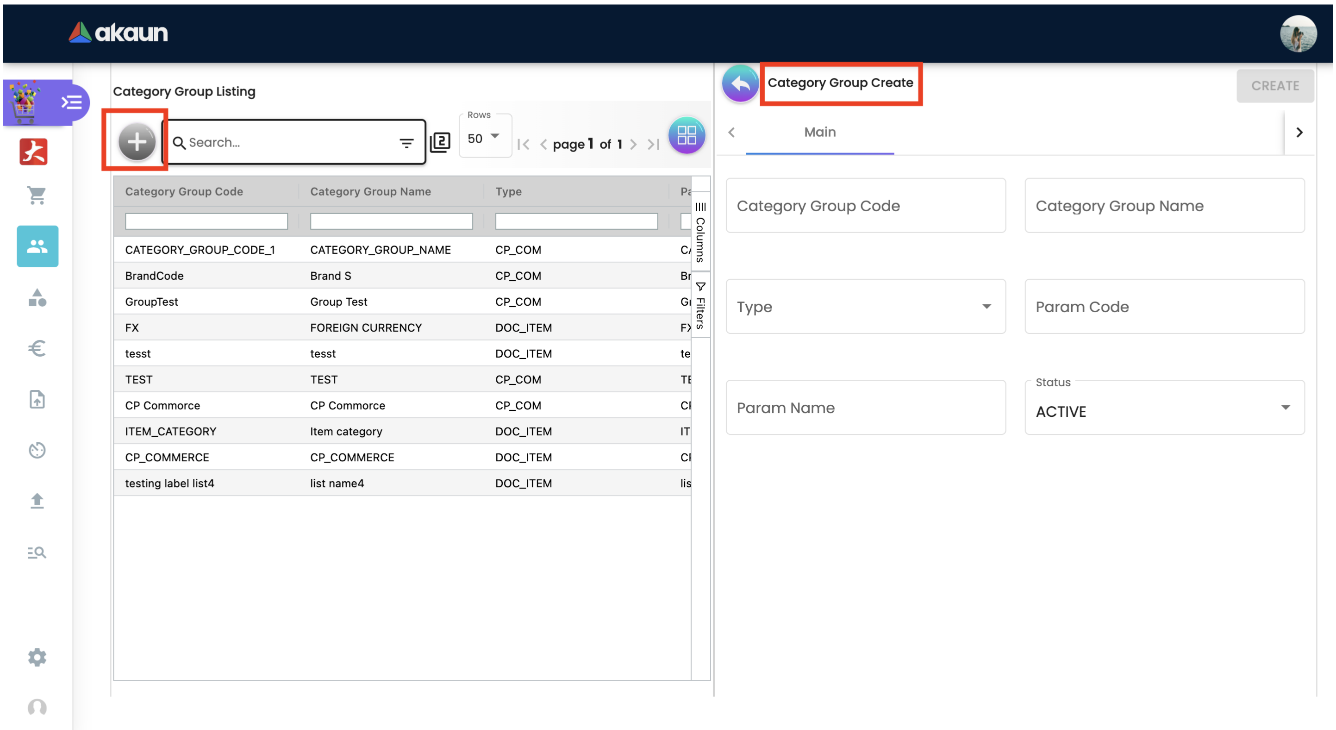


A.8.4.1. Category Group Create

In Order to create a Category group, click “+” button. It will open 3rd container for users to create category group.

These are the fields in the main tab to fill in:

- Category Group Code
- Category Group Name
- Type
- Param Code
- Param Name
- Status

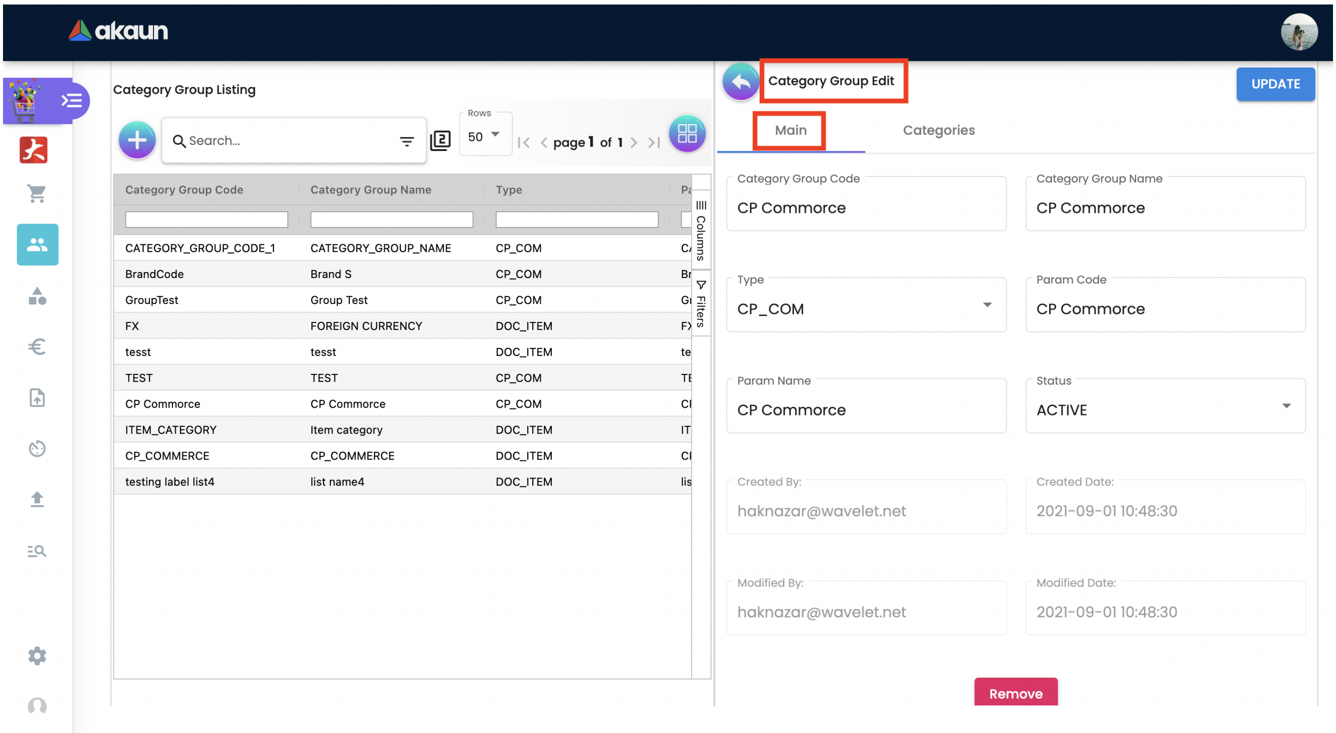


A.8.4.2. Category Group Edit

To edit existing category group users click on any of specific category group in the listing. Once clicked it will open second container with Category Group details. There are two tabs when editing Category Group which are:

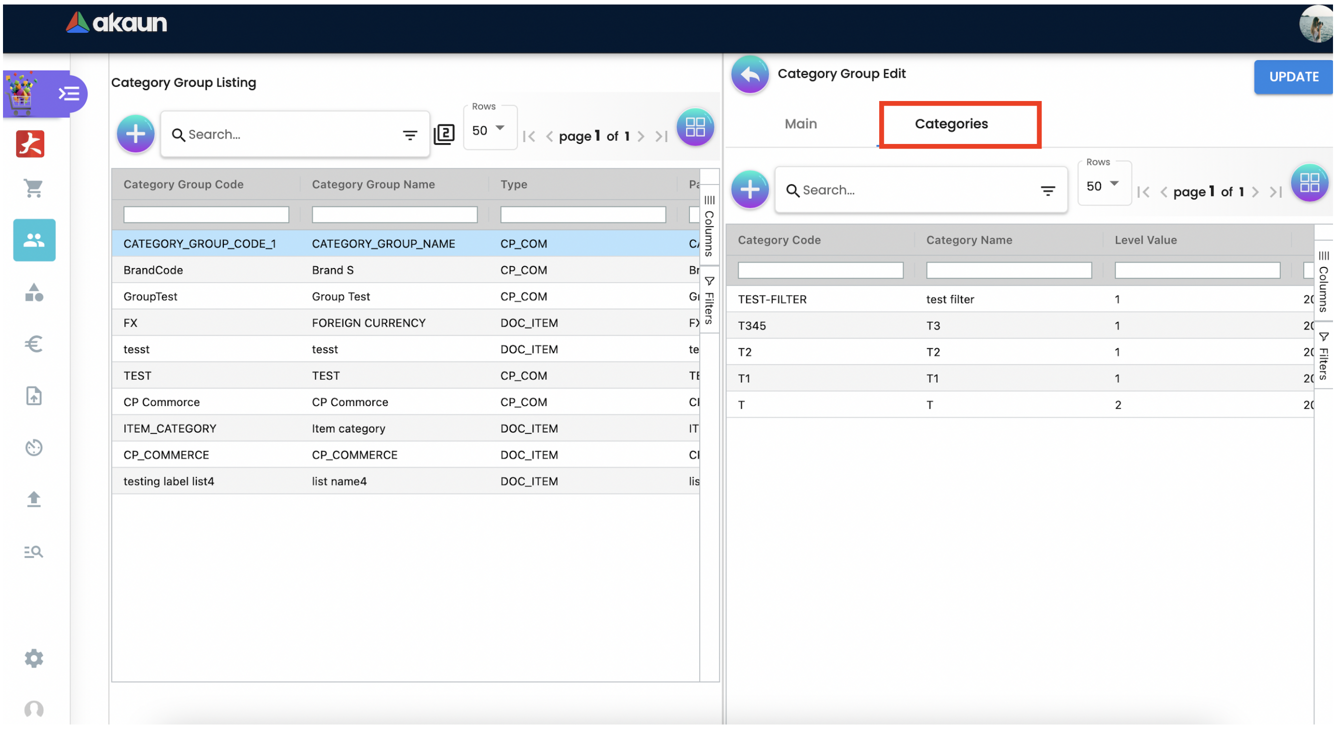
Main Tab

This tab shows the information on the category that was filled up when creating the category. Users edit or delete the Category Group in this tab.

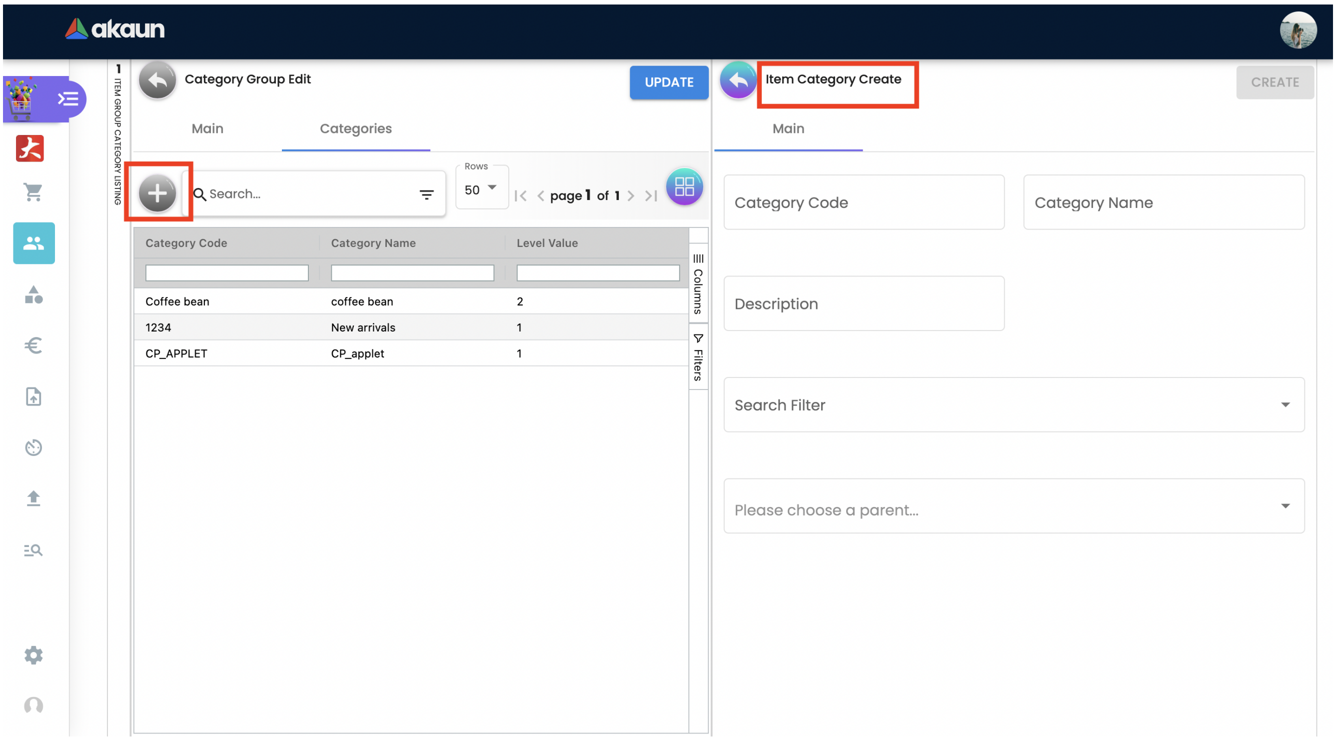


Categories

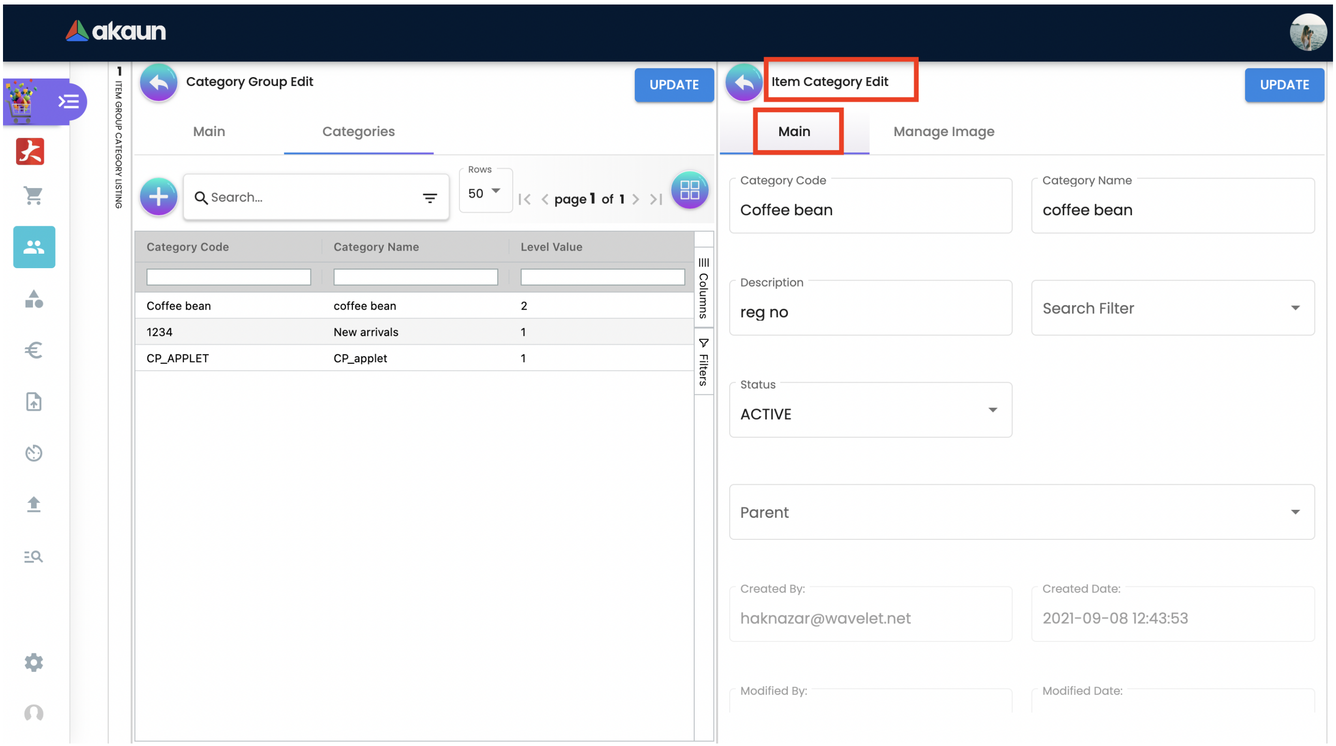
Categories Tab where the listing of linked categories is shown. Users can manage the categories in this tab.



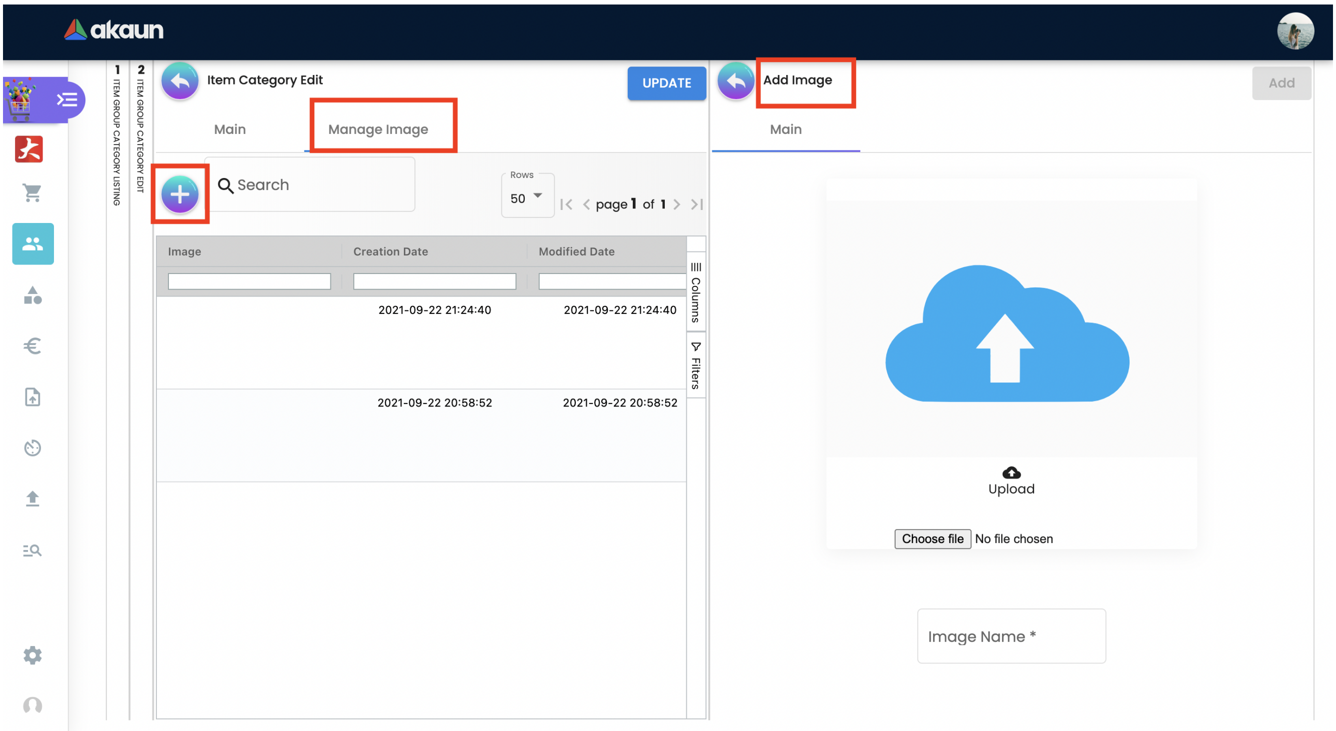
A.8.4.3. In order to add the category to the group users click "+" and create new item.



A.8.4.4. Users edit or delete the categories which linked to the group in this Item Category Edit tab



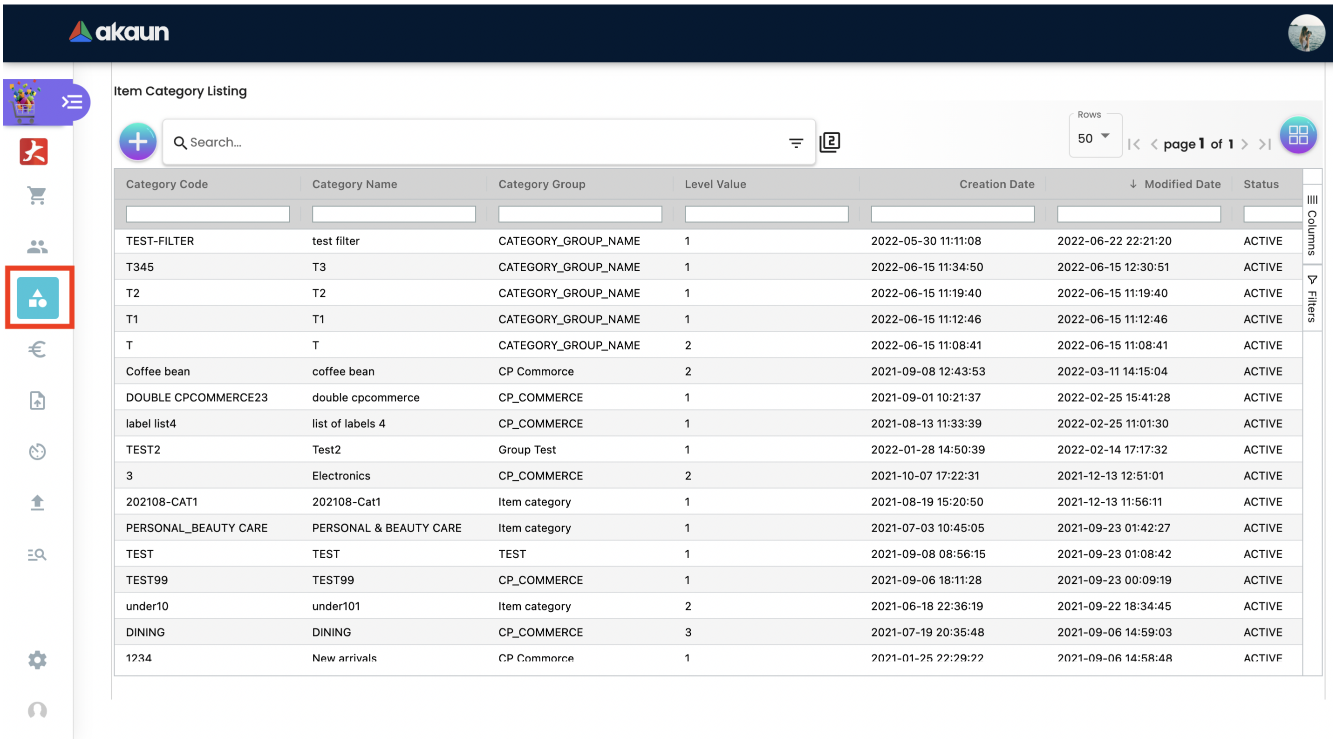
A.8.4.5. Category Images can be uploaded or editted in the Manage Image tab.



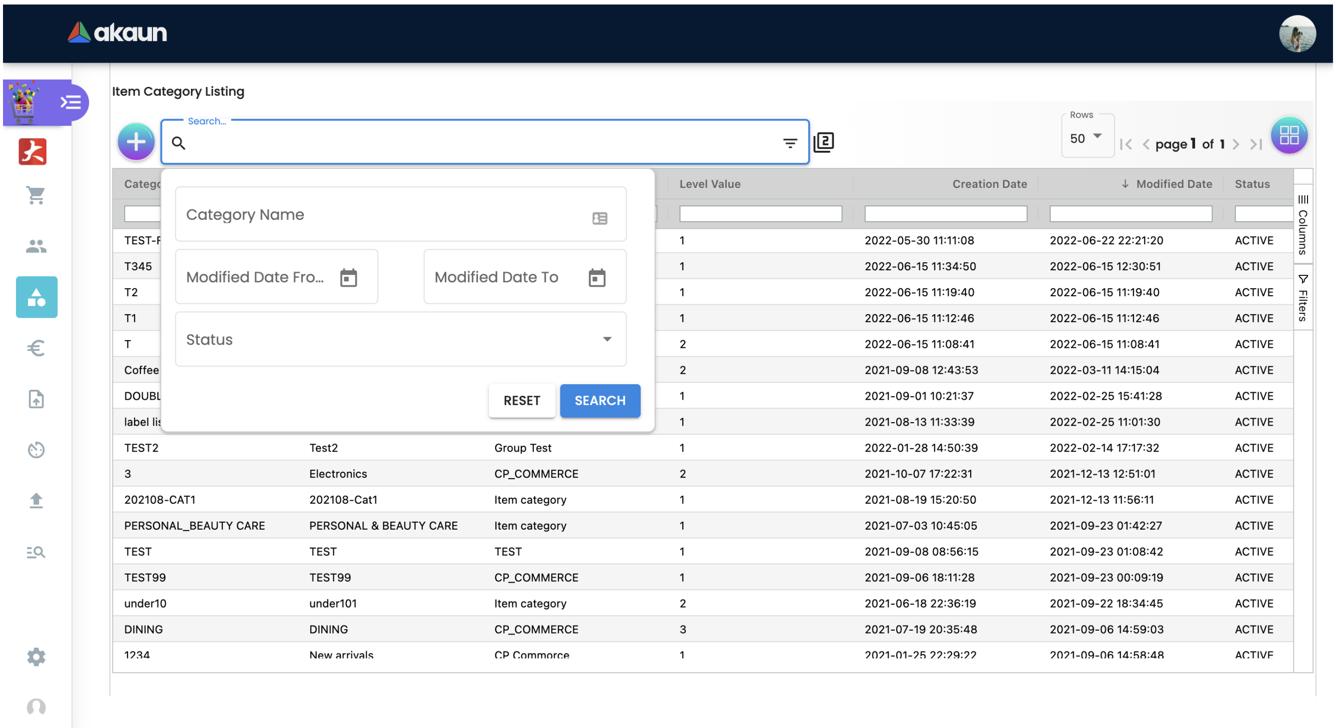
A.8.5. Menu 03 - Categories

A.8.5.1. Category module is used to create categories, as well as nest category that can be linked to an Item in Item maintenance Module.

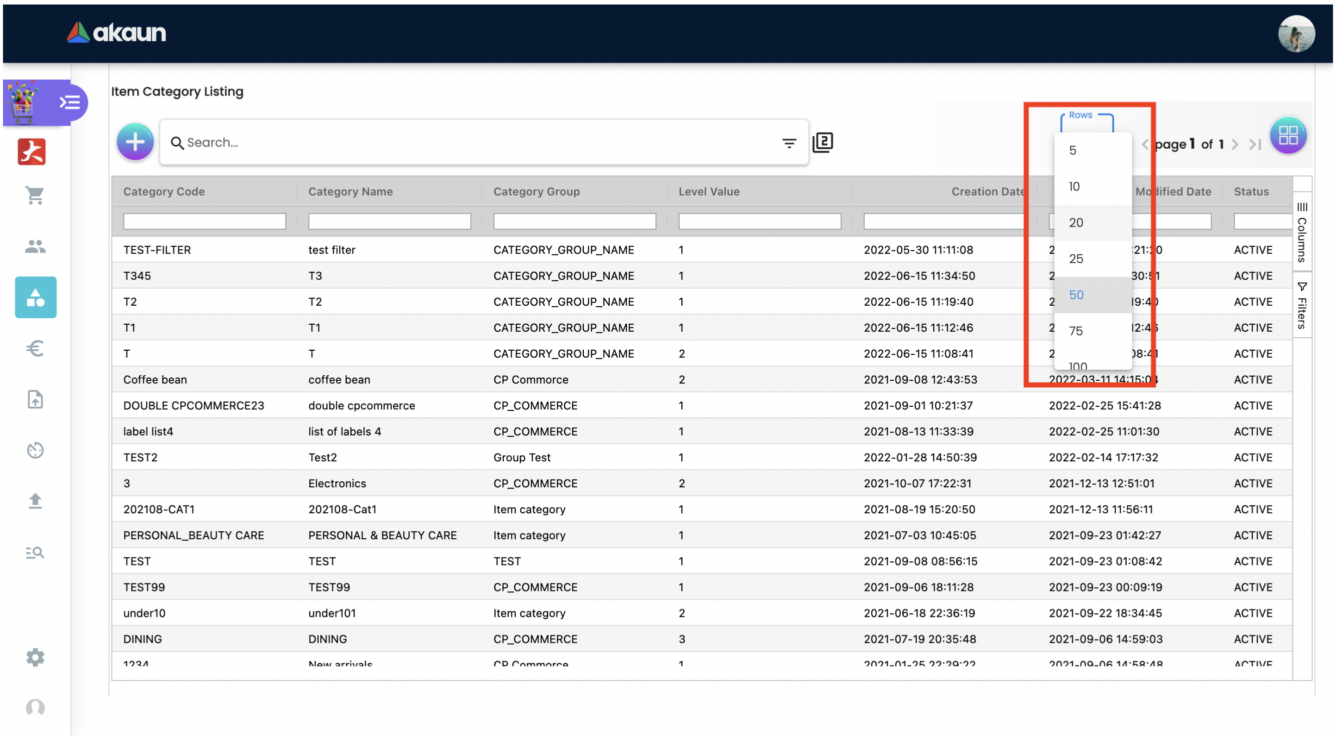
When user land in Category Listing, they will see the AG-Grid listing of all categories that has been created



The screenshot above shows the listing of all categories. User may customize the the columns by removing it or relocating it. User may search category through fuzzy search in the listing itself or may search through general search bar. In addition they may search by status and modified date in advanced search as shown in the picture bellow:

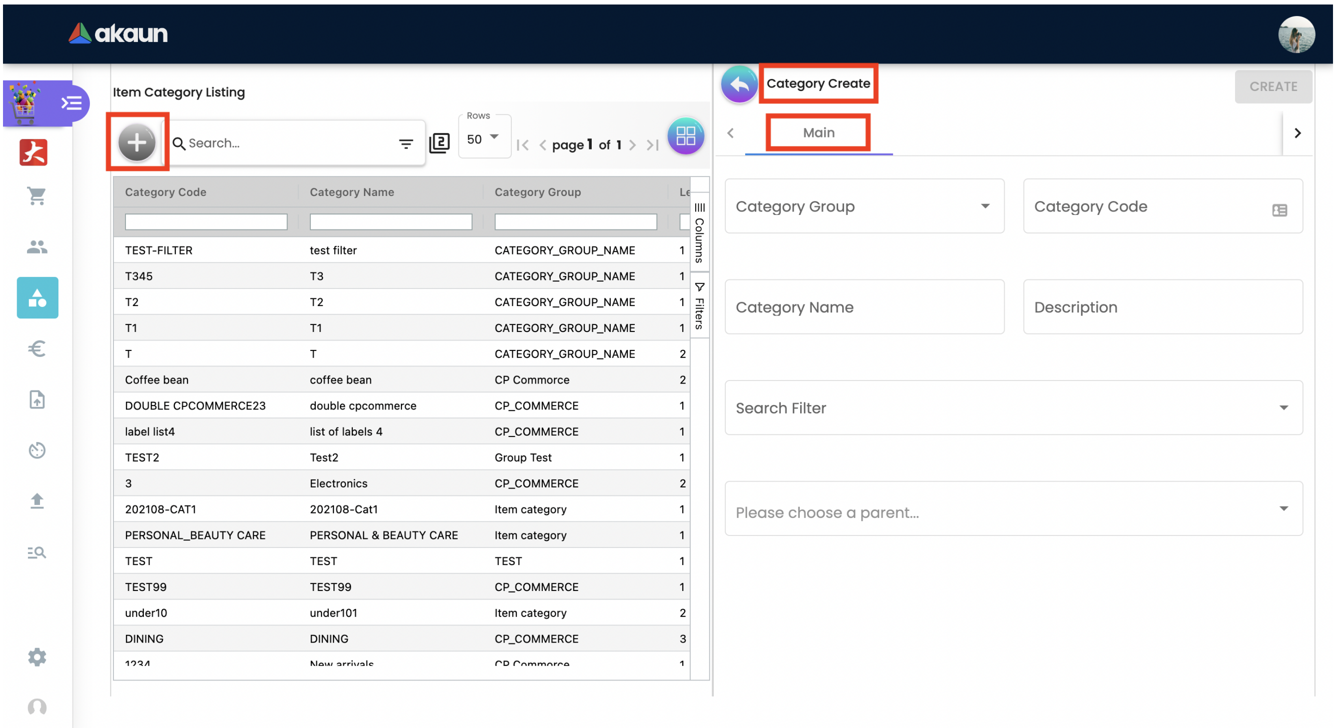


Pagination Row can be customized based on user's preference as shown in screenshot bellow:



A.8.5.2. Create Category

When user wants to create new category for an item they can go to “Category Module”. then user must click on “+” it will redirect to the 2nd container where user must fill up required filed. Category will make it easier for user to search specific group of items either in Doc Item Maintenance or in transactional applets.



There are two mandatory fields in when creating category which are:

- Category Name
- Category Code

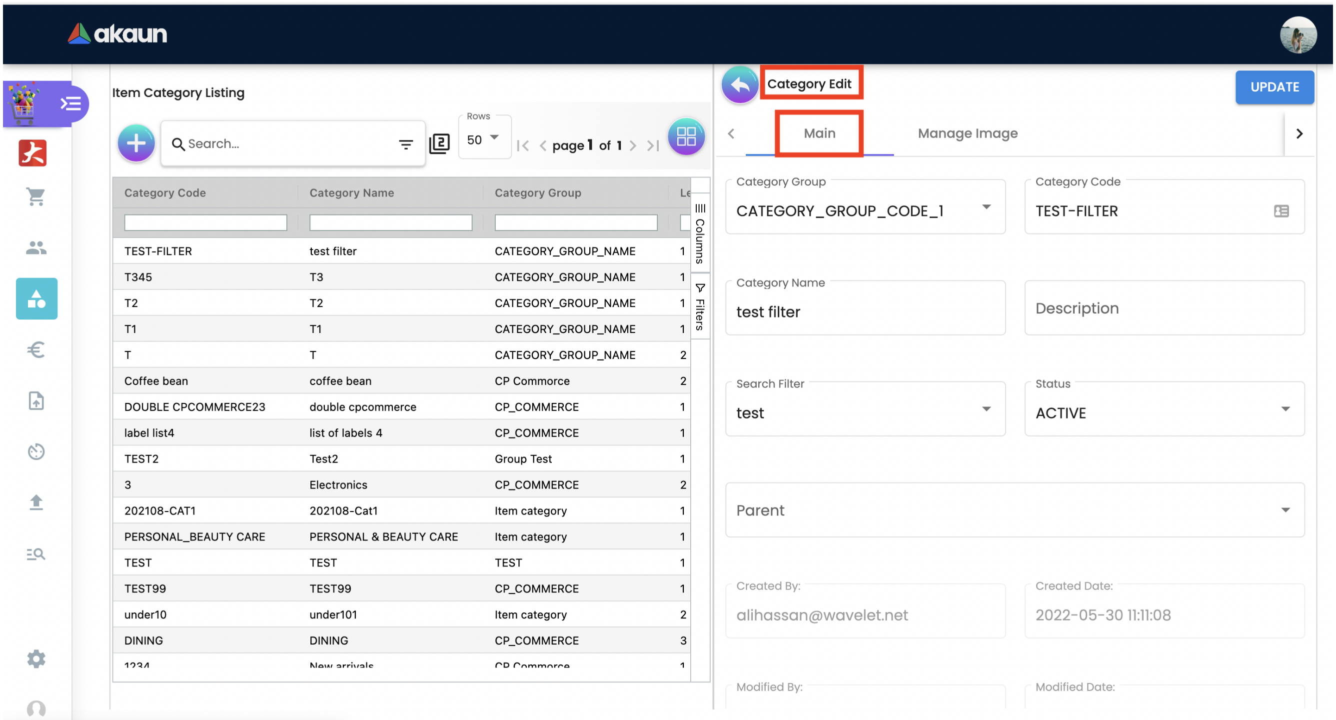
- Description - is not compulsory
- Nesting category - it is when a single category can be associated with multiple categories. for example:
    - Main category = Smartphones
    - Nested Category = Iphone

A.8.5.3. Edit Category

When user wants to edit existing category they may click on any of specific category in the listing. Once clicked it will open second container with Category details. There are two tabs when editing Category which are:

Main Tab

This tab shows basic information on the category that was filled up when creating the category.



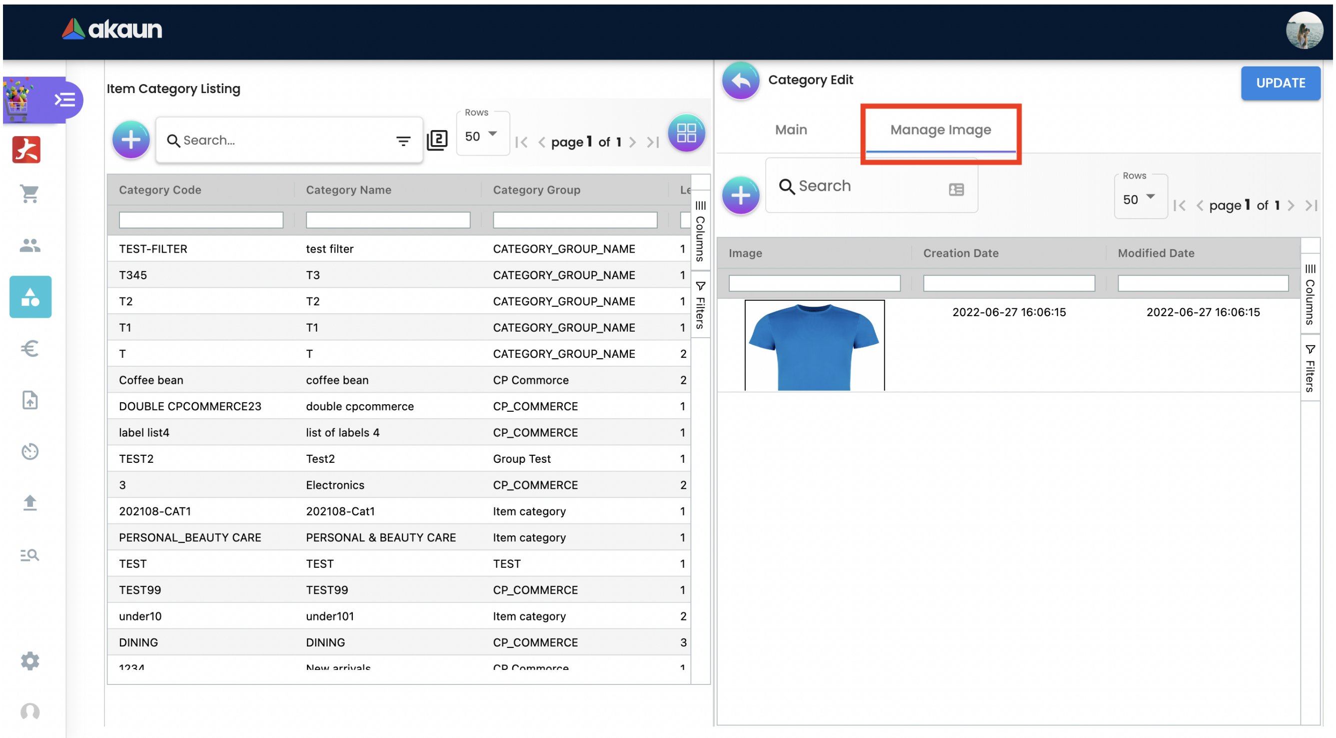
These are the fields in the main tab:

- Category Name - can be adjusted, compulsory to fill up
- Category Code - can be adjusted, compulsory to fill up
- Description - can be adjusted, not compulsory
- Status - to specify whether the category is Active or Inactive
- Nesting the category - it is when a single category can be associated with multiple categories. Can be adjusted. Example of nested category:
    - Main category = Smartphones
    - Nested Category = Iphone
- Summary - cannot be adjusted, as it is used as reference for the user to show details such as:

◦ Created by who
◦ Modified by who
◦ Creation date
◦ Modified Date

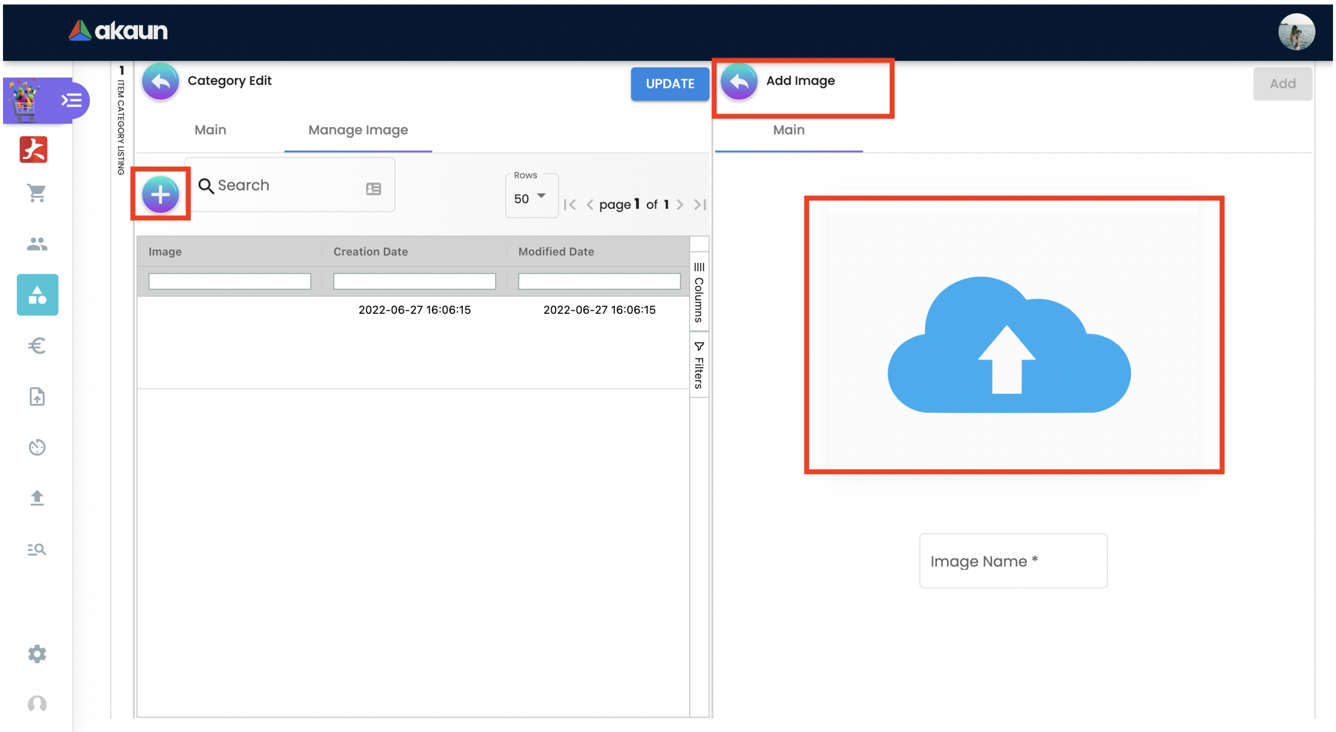
Manage Image Tab

CP Commerce displays product categories for easy referral for customers. Users can use the Manage Image Tab in the Doc Item Maintenance applet to upload relevant category images. Upon clicking on categories, the user will be shown all relevant products under said categories.



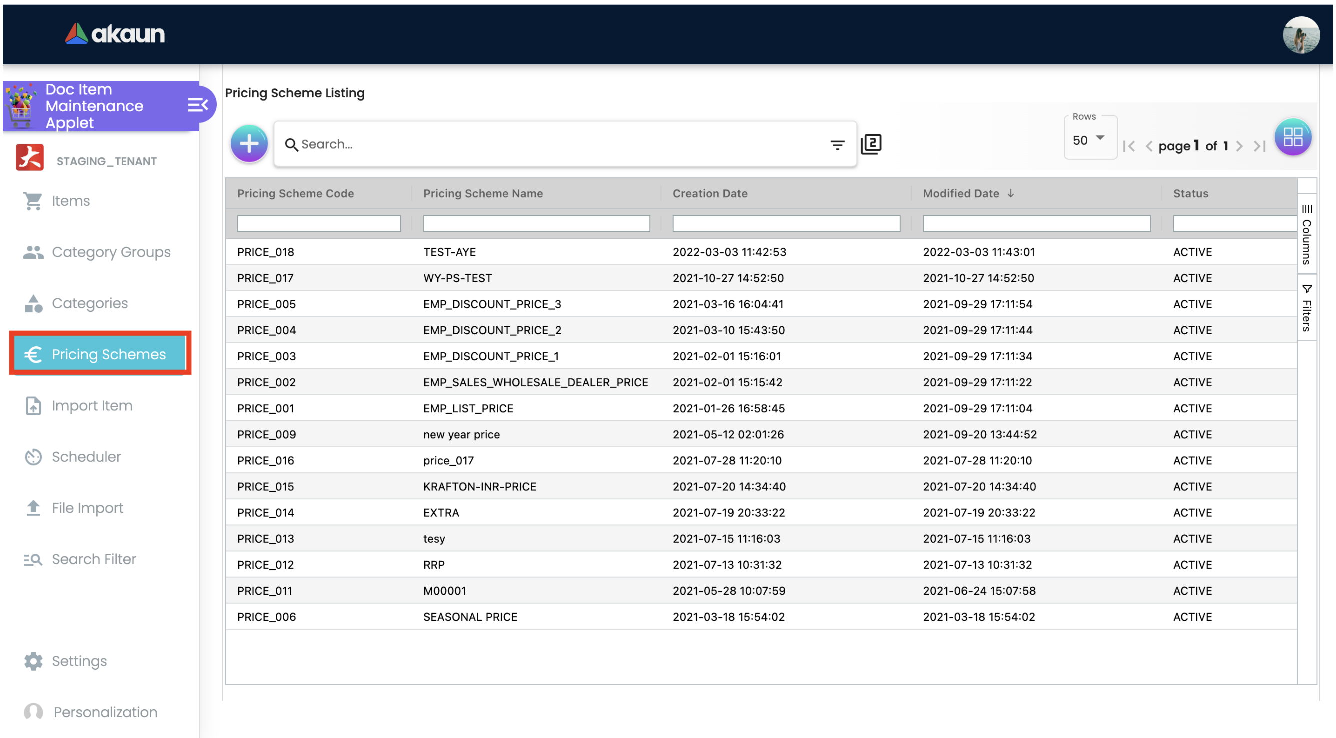
When users want to add image, they click on "+" button, once clicked the second container will appear, where user can select the image and specify the image name as shown bellow.

These are the fields in the main tab:

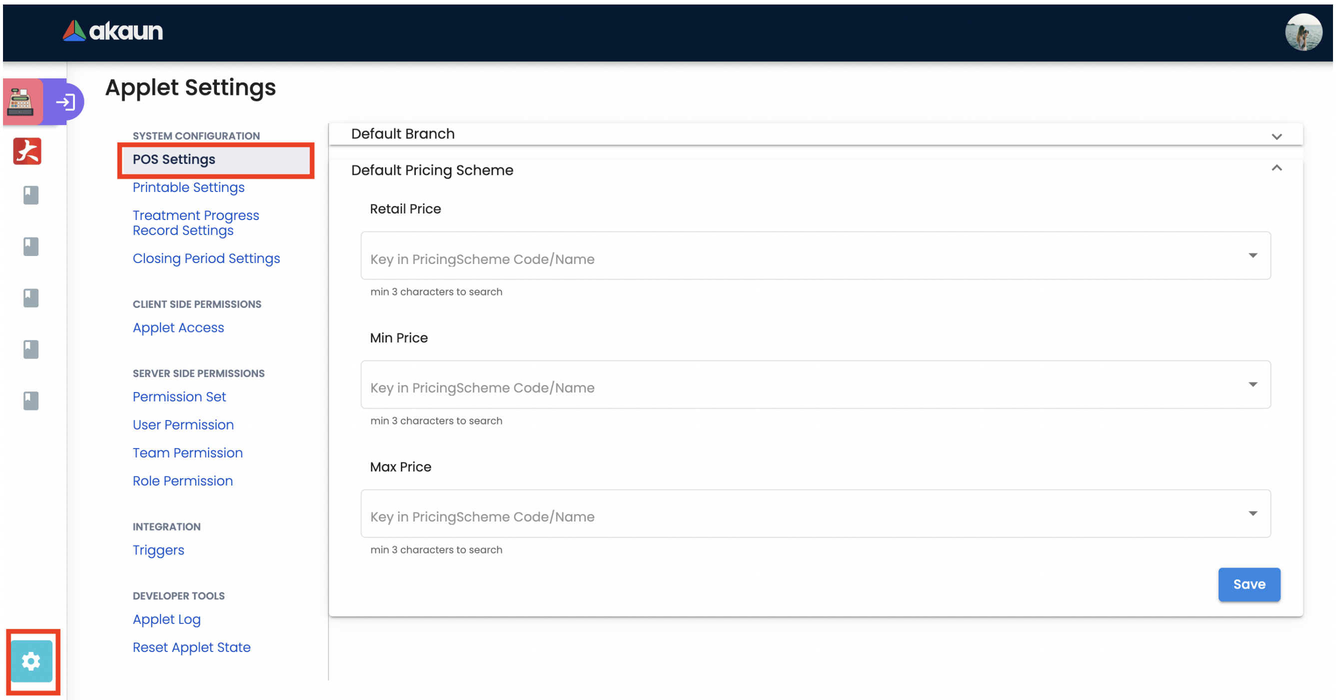


A.8.6. Menu 04 - Pricing Schemes

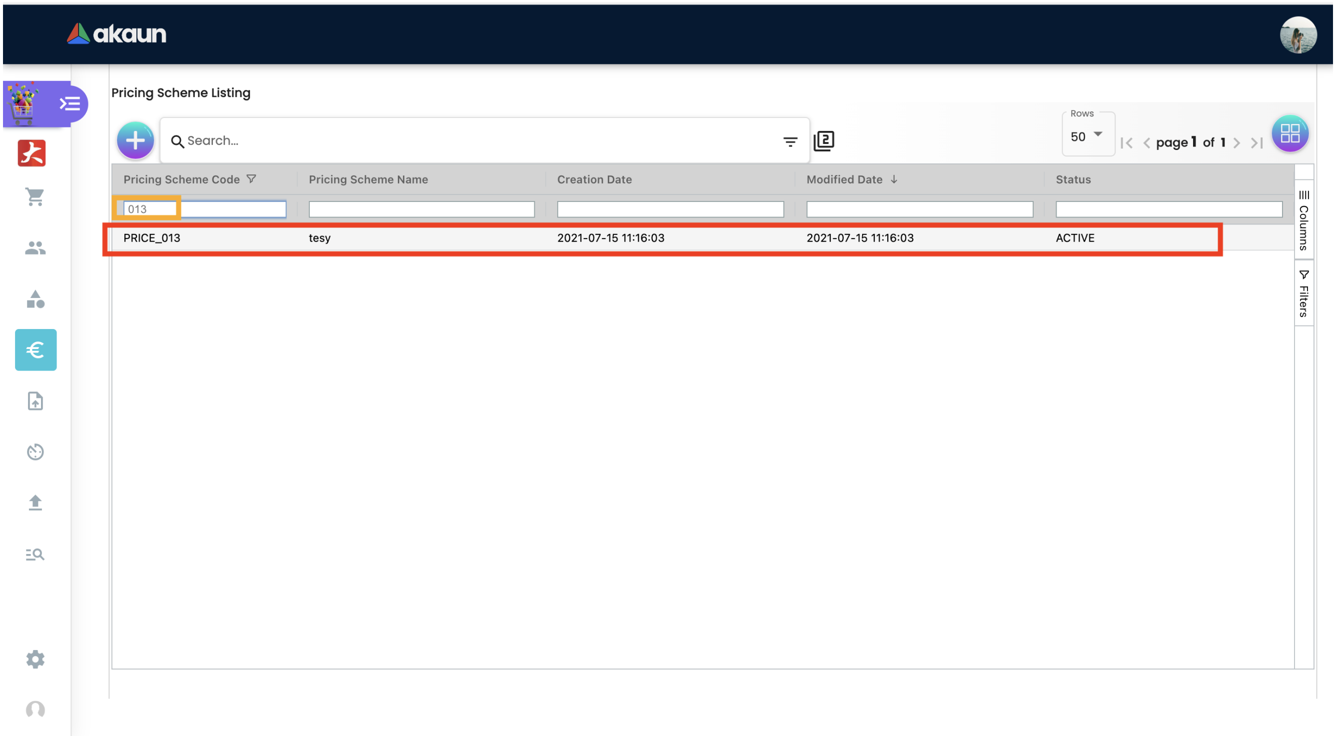
Once a user clicks on the pricing scheme module it will land on the pricing scheme listing page. The module is used to create the template for pricing that can be also used in transactional applets such as POS, GRN etc. In this module you can only create the template/scheme, the price can be added later for each specific item in the "Item Maintenance" module

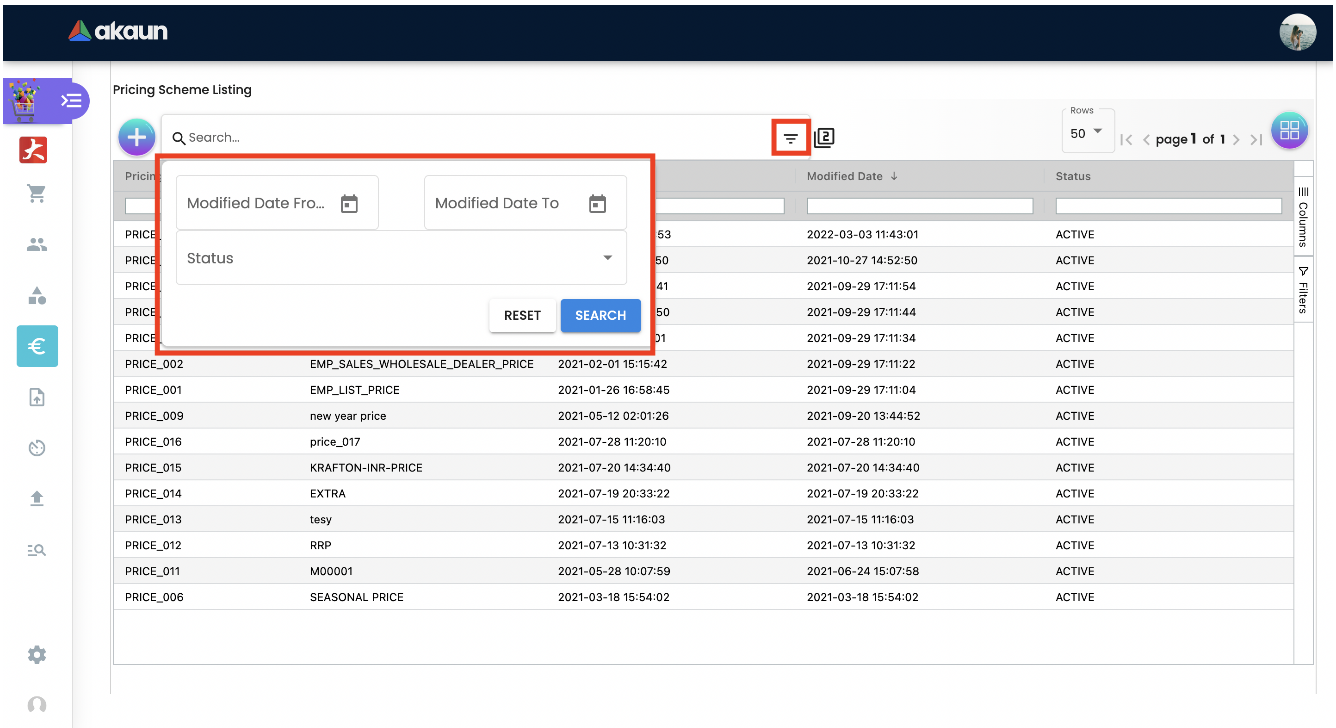


For example, in POS applet, user can go to the settings and choose which Pricing Scheme they want to use for minimum price , maximum price or retail price as shown in the screenshot below



Users also may search pricing schemes in the listing itself using fuzzy search in the AG-Grid listing. Pricing scheme can be searched in general search or advanced search:

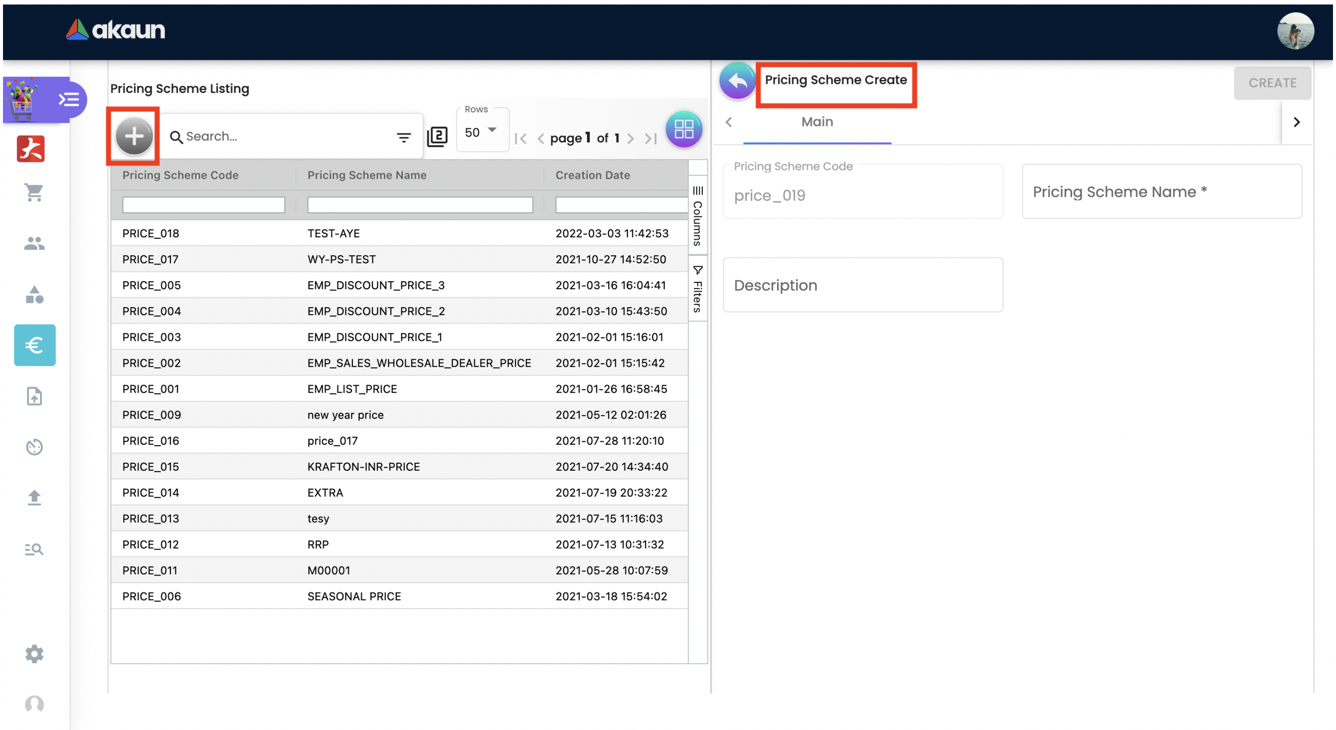




A.8.6.1. Pricing Scheme Create

In order to create Pricing Scheme, user should click on "+" button, once clicked it will open a second container where user can fill up general details on pricing scheme such as:

- Pricing scheme Code - code is created by the system.
- Pricing Scheme Name - compulsory to fill up
- Description - not compulsory



A.8.6.2. Pricing Scheme Edit

If the user wishes to edit the Pricing Scheme they can click on specific pricing scheme in the listing, once clicked it will redirect to the second container where user can edit remaining information.

There are three tabs included In Pricing Scheme Edit

- Main
- Copy
- Checking

Main Tab

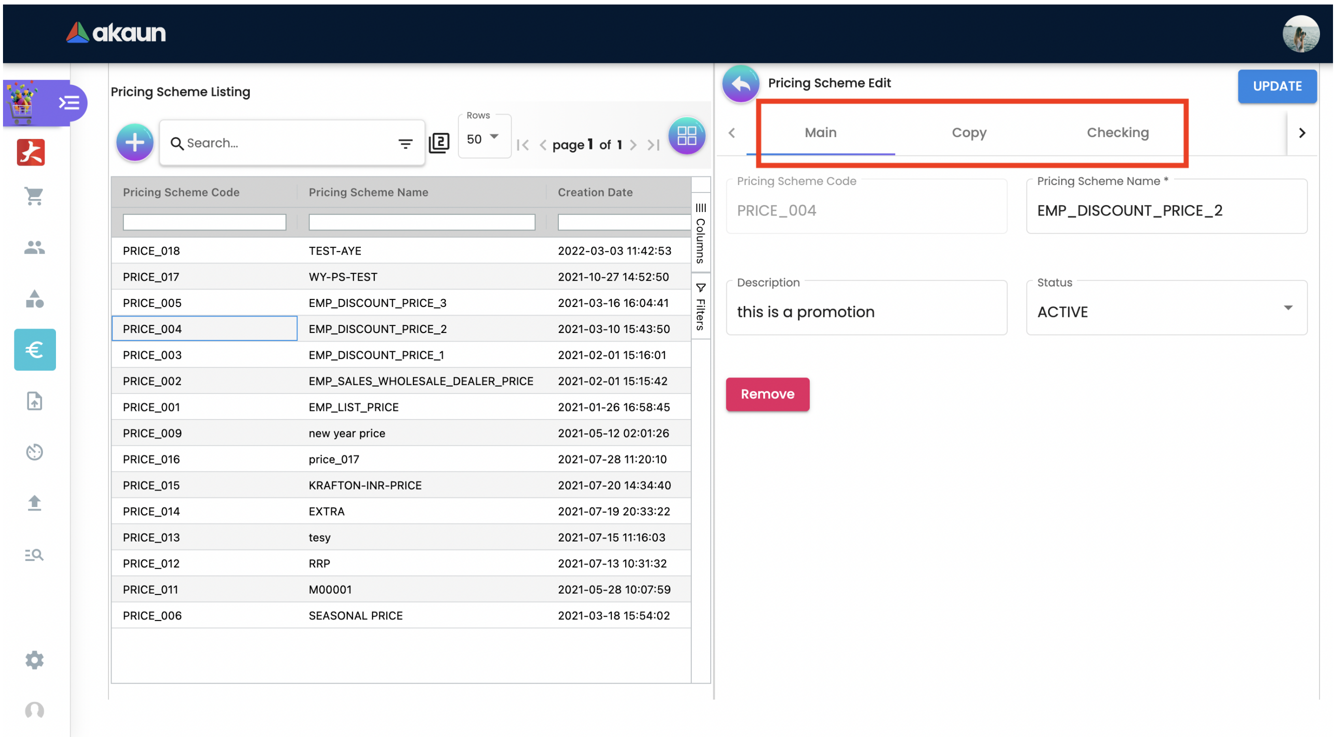
- Pricing Code - cannot be edited
- Pricing name - user able to edit the name
- Description - user able to edit description. description is not compulsory

Status - user able to specify whether the pricing scheme is active or inactive

In addition users may delete the pricing scheme if they wish to. Users may click on the “Remove” button on the bottom.

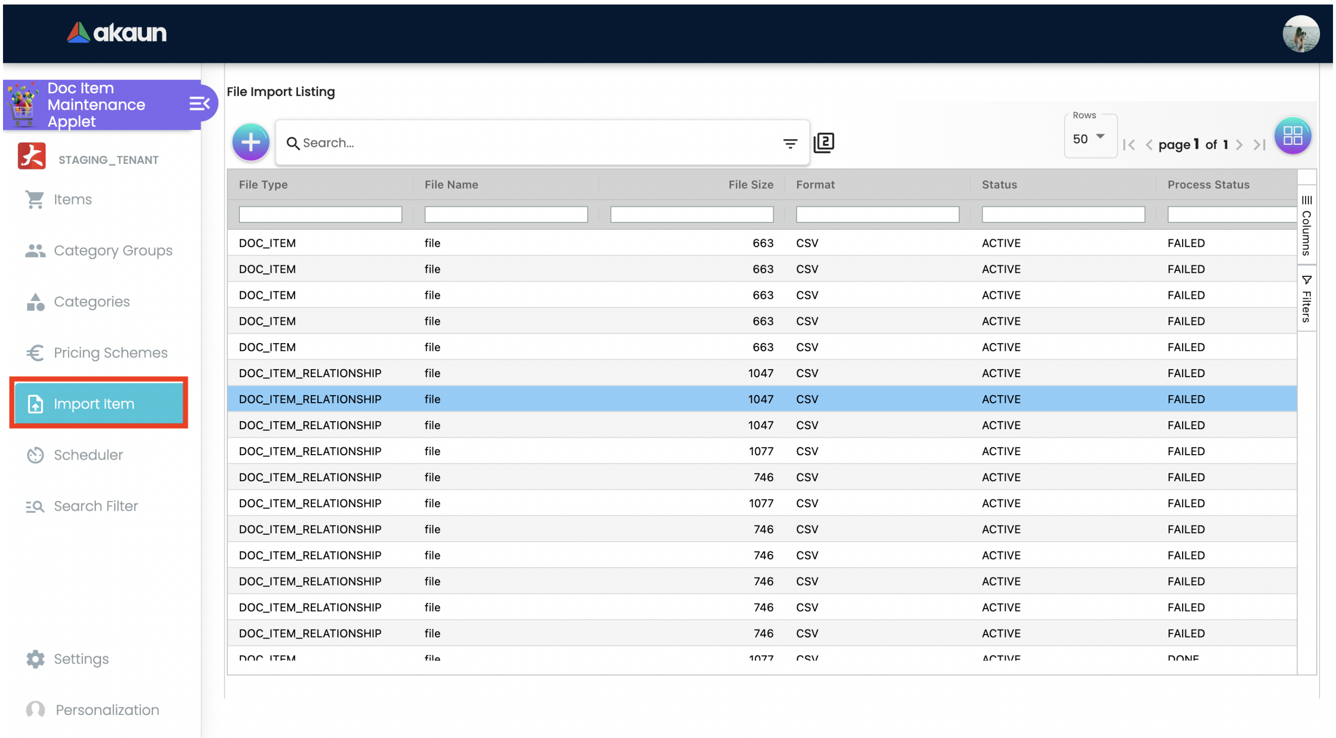
Copy Tab

User selects one item from the Pricing list in the drowdown list and makes some amendments to the pricing.

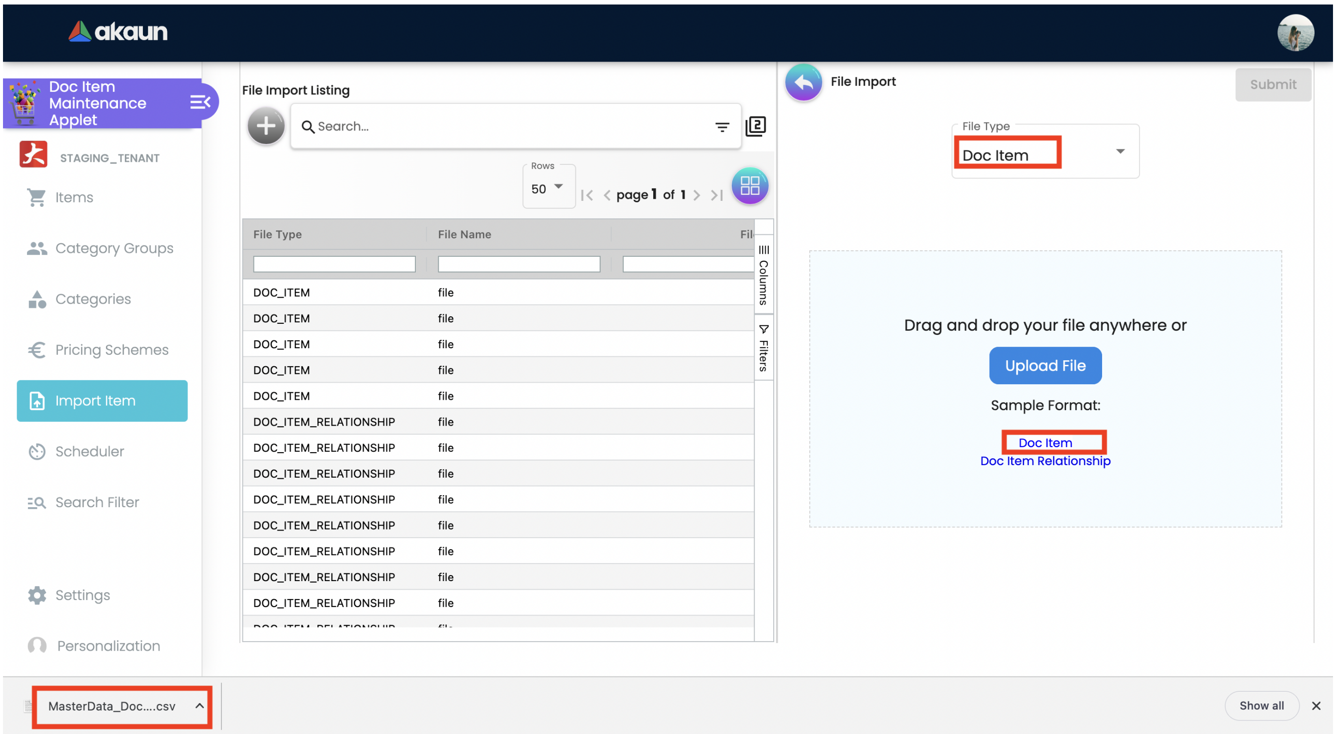


A.8.7. Menu 05 - Import Item

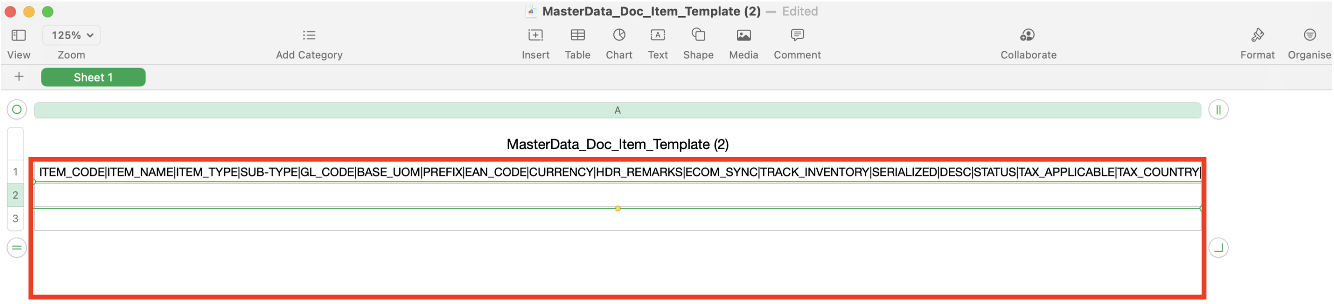
Import Item Module is used to mass upload the products using CSV file. This function is especially useful for the user if they have a wide range of products. It could tremendously save your time and absolutely accurate.



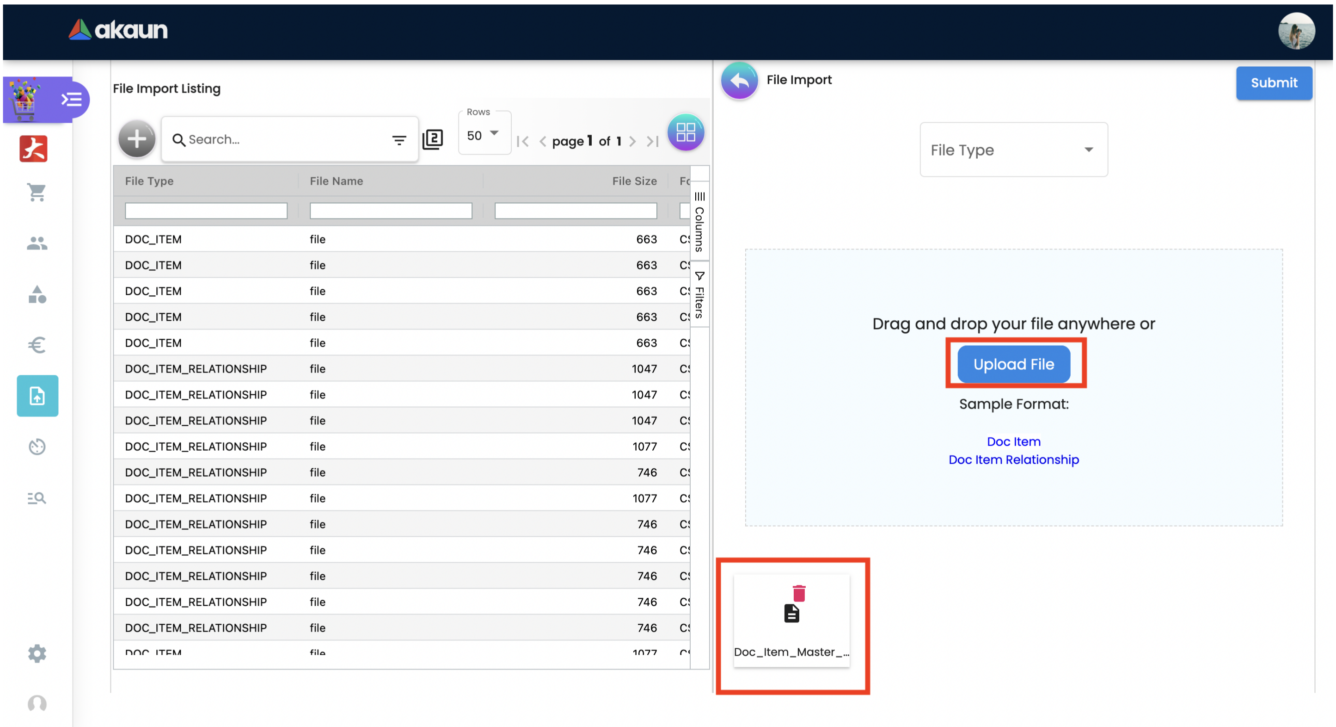
In order to upload products in bulk, click "+", and it will direct you File Import page. First, you need to choose file type and download the upload file template by clicking the chosen file type.



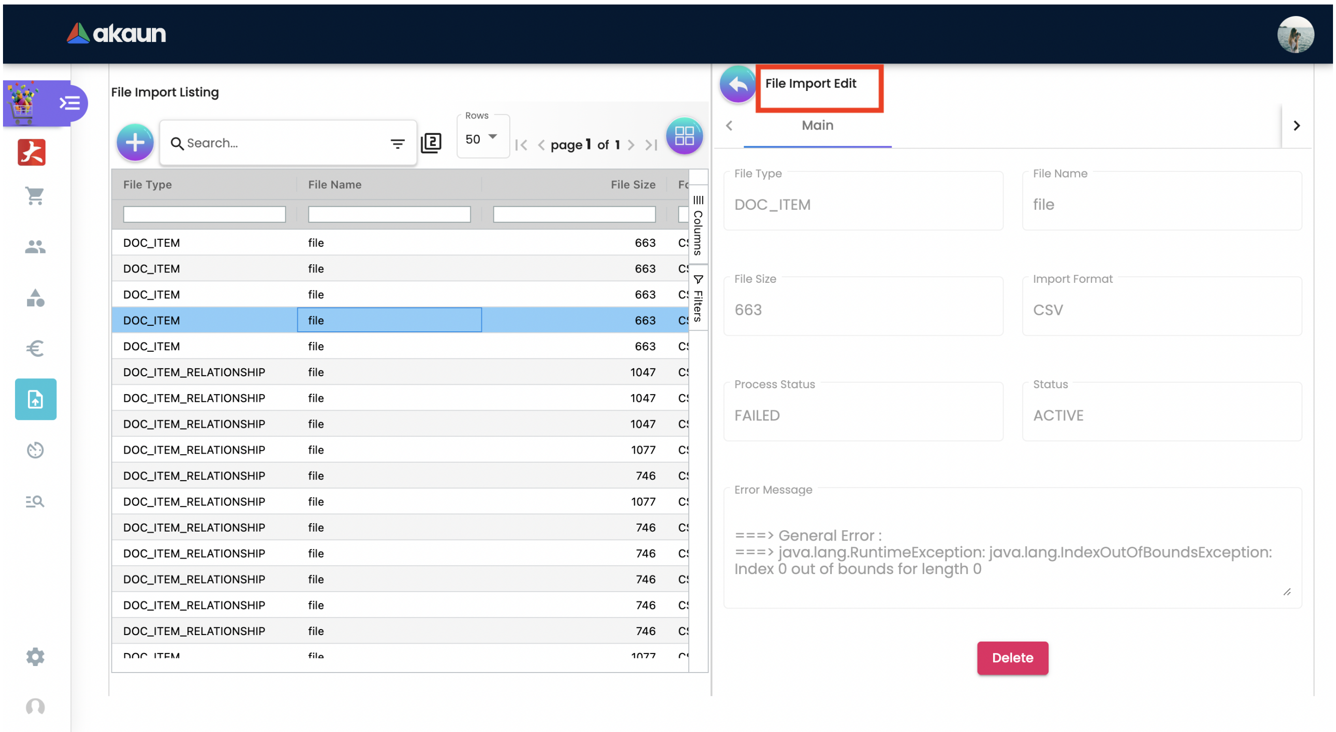
Open the CSV file, insert your product details into the file accordingly.



- Once done, save the file in .csv format.
- Upload file by just clicking the Upload File button or by Drag and drop file in the box.
- User will see uploded file at the bottom of the page.

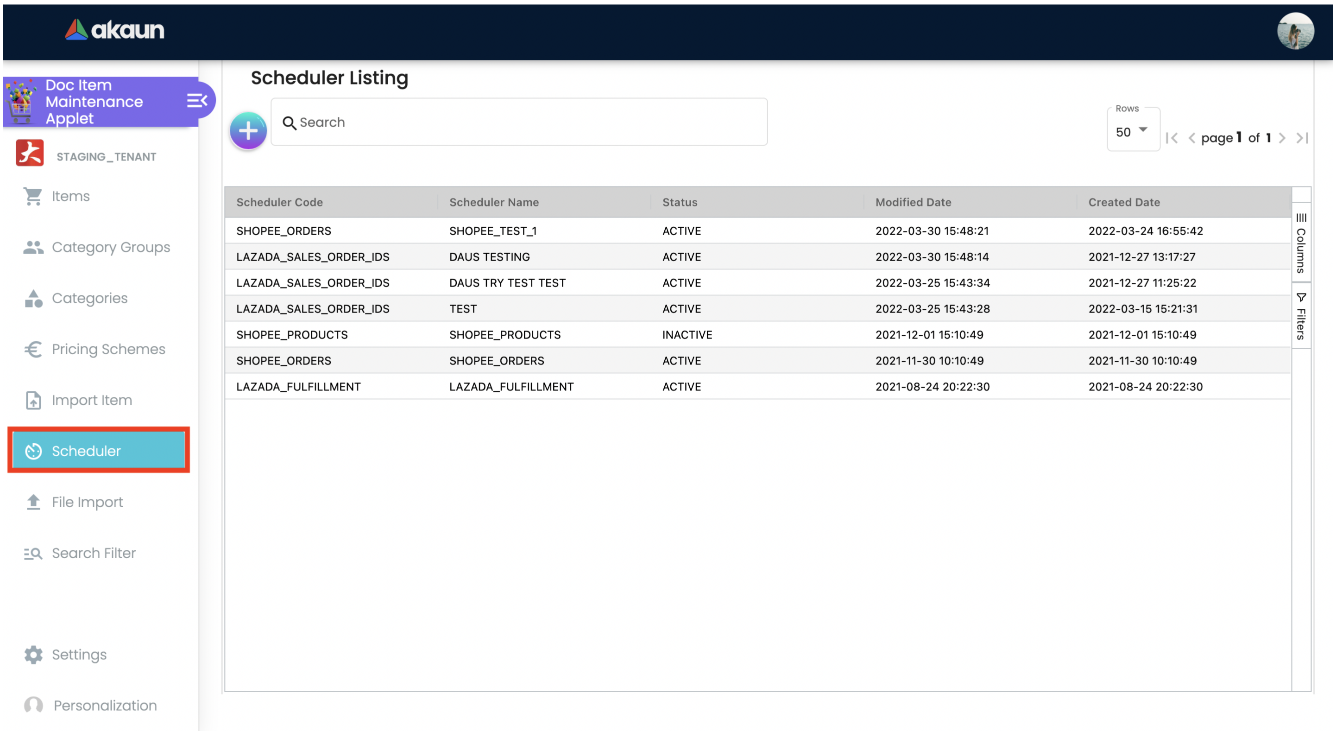


User can delete the uploaded file in File Import Edit page



A.8.8. Menu 06 - Scheduler

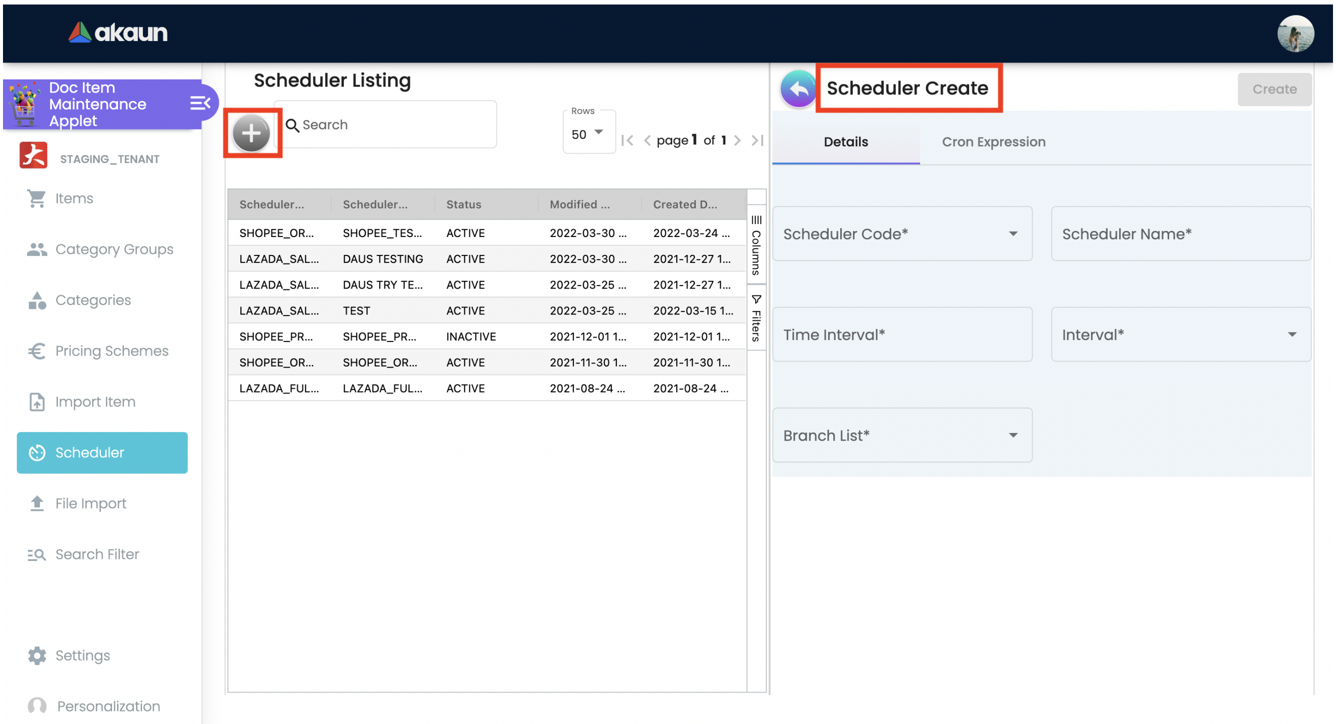
Scheduler allows the user to schedule and track the work of the processor. Used to set the start and end date and how often the processer will run.



A.8.8.1. In order to create Scheduler, user click "+", and will go to the second page. In the details tab - user fills in:

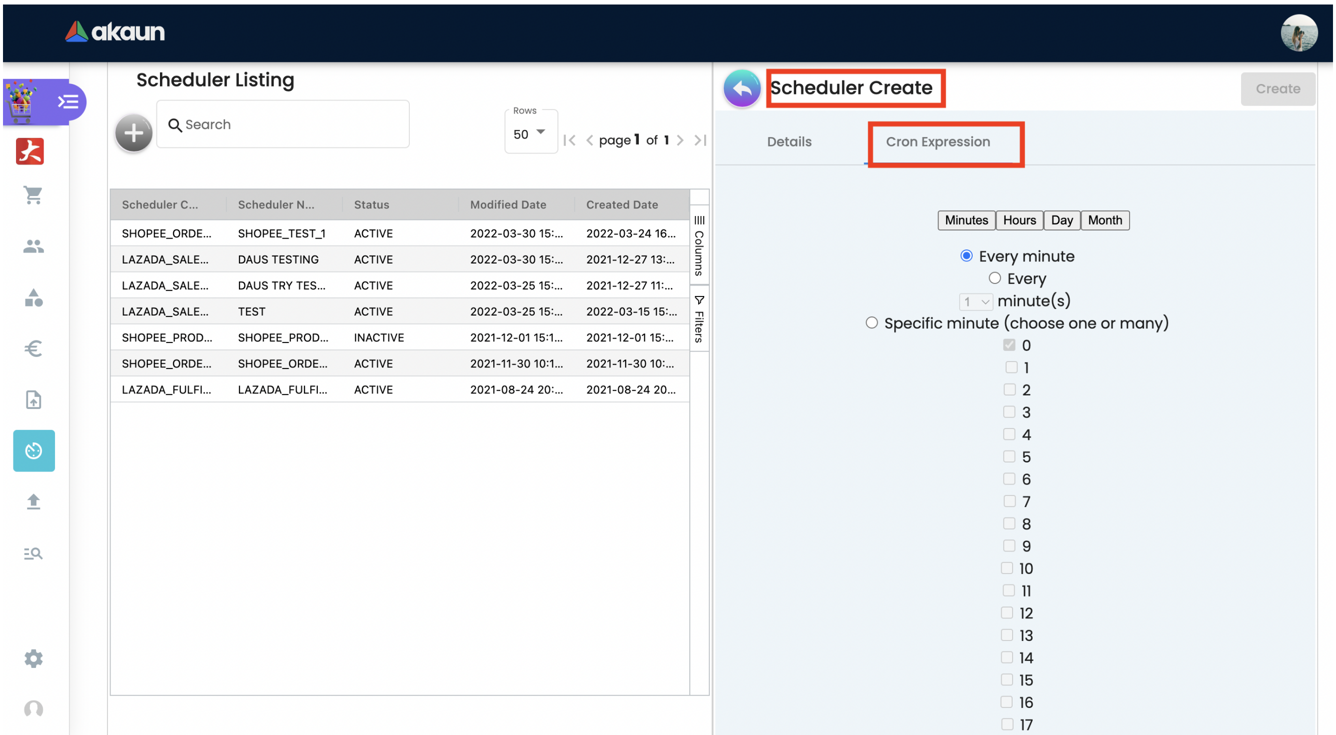
- Scheduler Code
- Scheduler Name
- Time Interval

- Interval
- Branch List

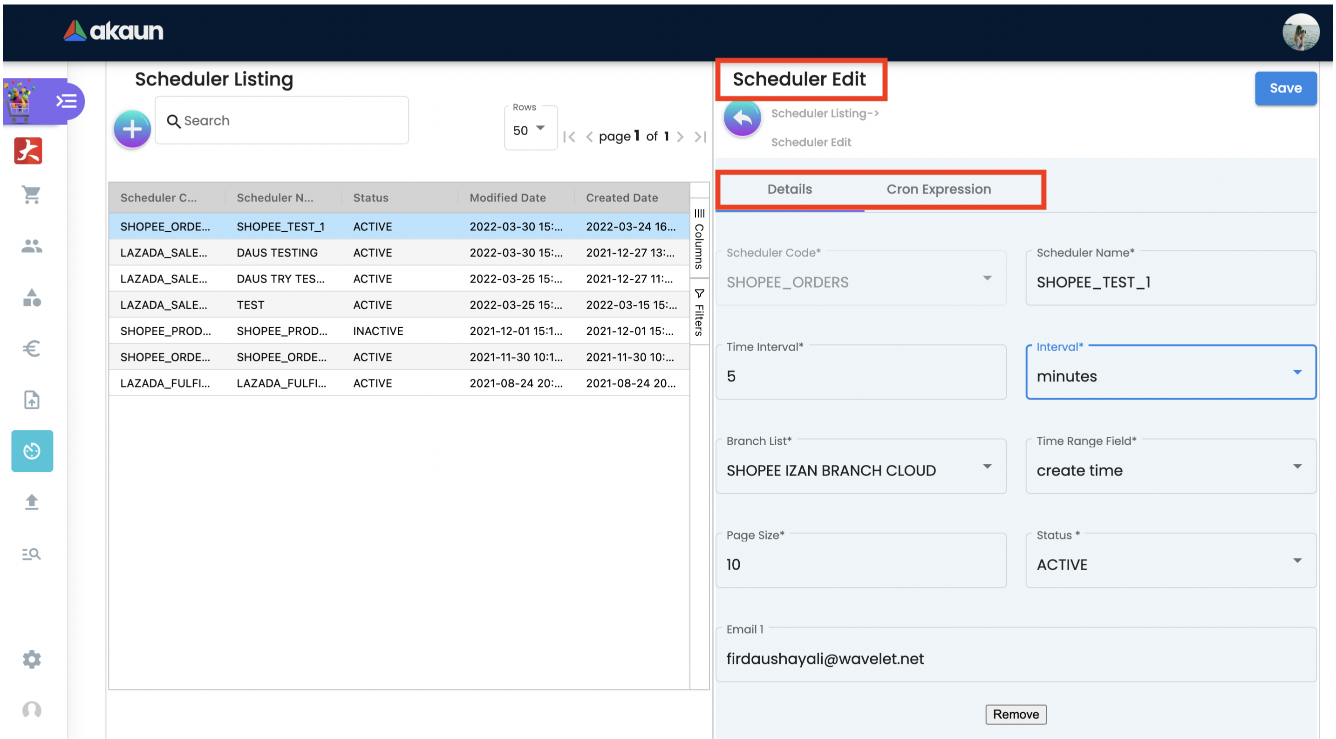


Corn Expression tab

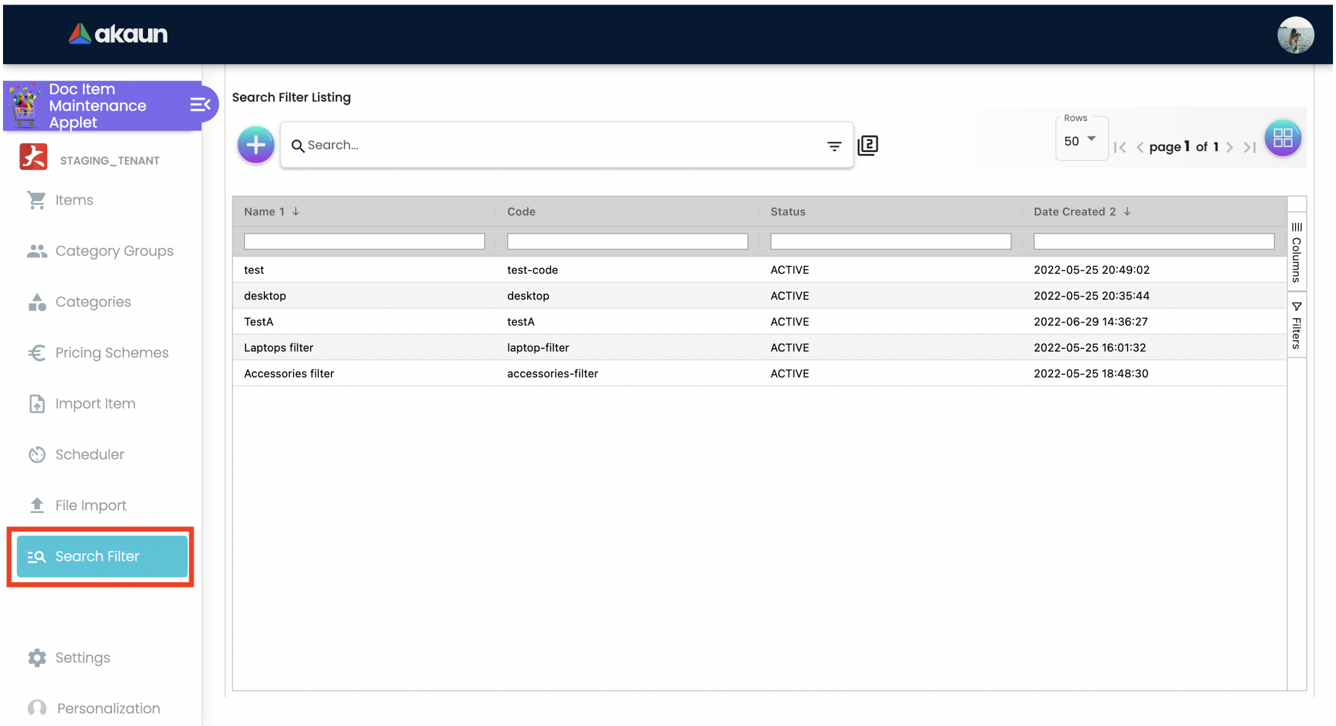
It enables users to schedule tasks to run periodically at a specified date and time.

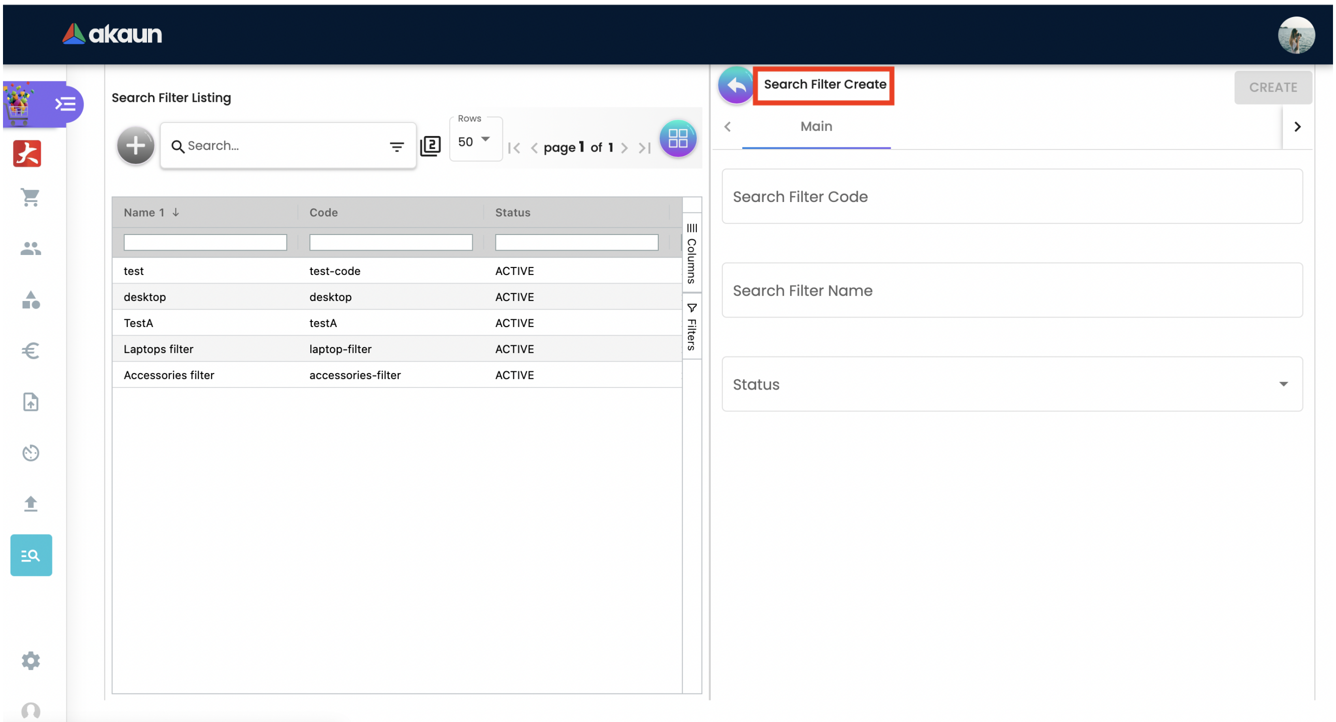


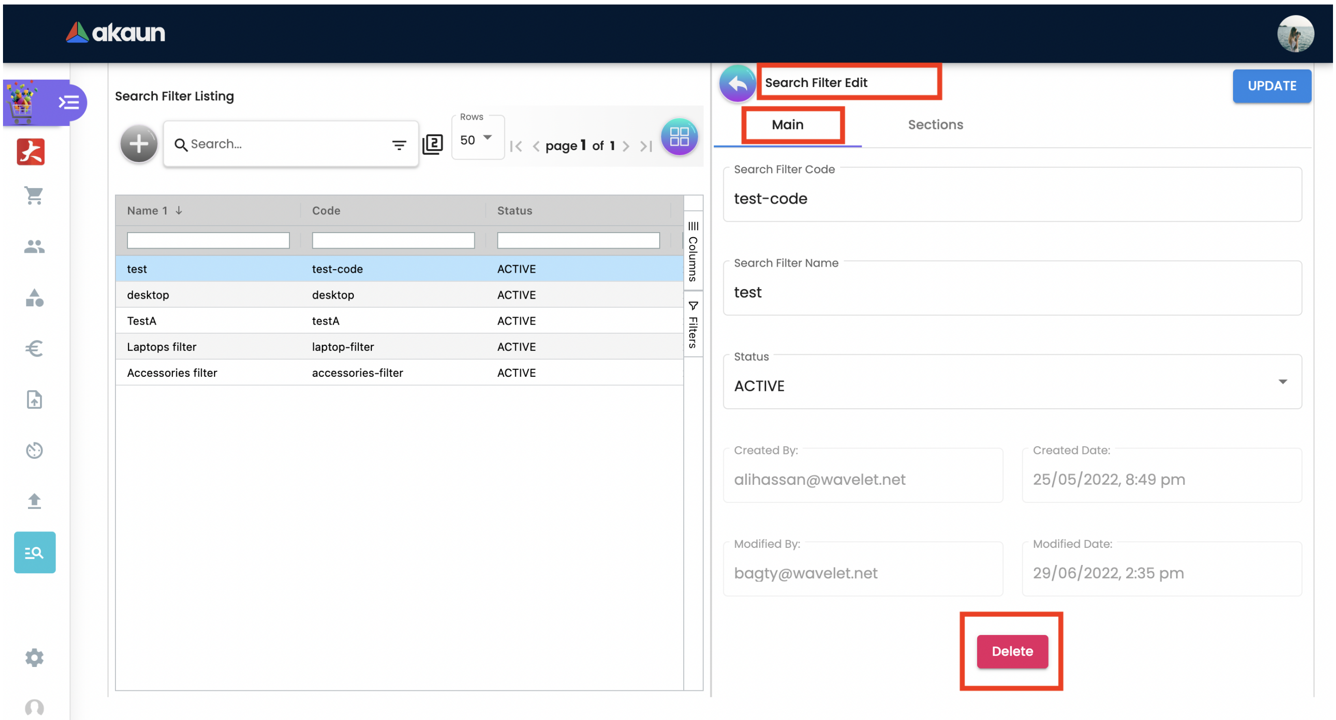
To edit or remove Scheduler, select the specific scheduler you want and it will lead you to the second page where u can implement your changes.



A.8.9. Menu 08 - Search Filter







A.8.10. Permission Settings

A.8.11. Personalization

A.8.12. Related Applets

This applet also depends on the following applets:

- Section A.5, “Chart of Account Applet”
- Section A.14, “Organization Applet”
- Section A.19, “Tax Configuration Applet”

The following applets depends on this applet:

- Section A.16, “POS - GP”
- Section A.20, “UCC Applet”

Also see

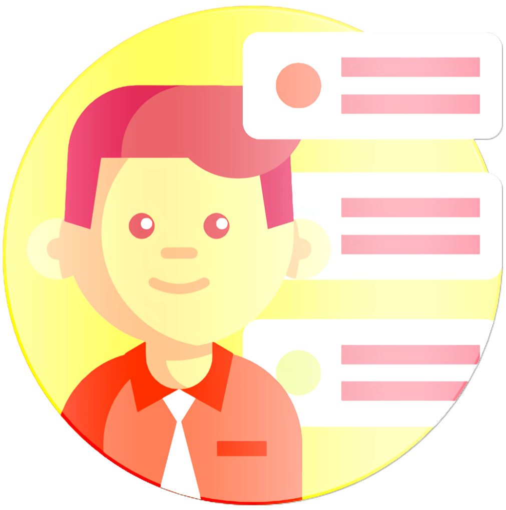
A.8.13. Pricing

A.8.14. Release Note

A.8.15. 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

[150] | *entity_maintenance_applet.png*

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

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. POS - GP

A.16.1. Introduction

This is a simple description of the applet, no more than 100 words.

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 - e.g. Sales Orders Listing

A.16.4. Menu 02 - e.g. Line Items

A.16.5. Permission Settings

A.16.6. Personalization

A.16.7. 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.16.8. Pricing

A.16.9. Release Note

A.16.10. Roadmap

A.17. Stock Take V2 Applet

A.17.1. 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.17.2. Modules

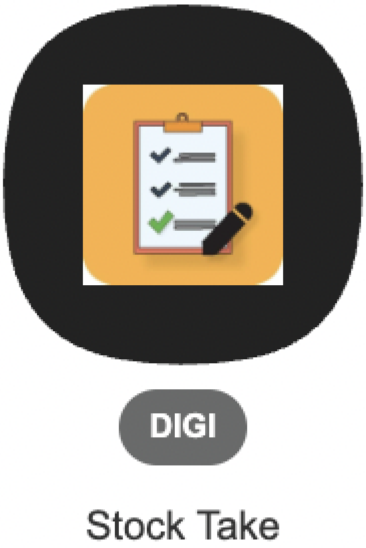
This applet is used in the following modules:

- 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”

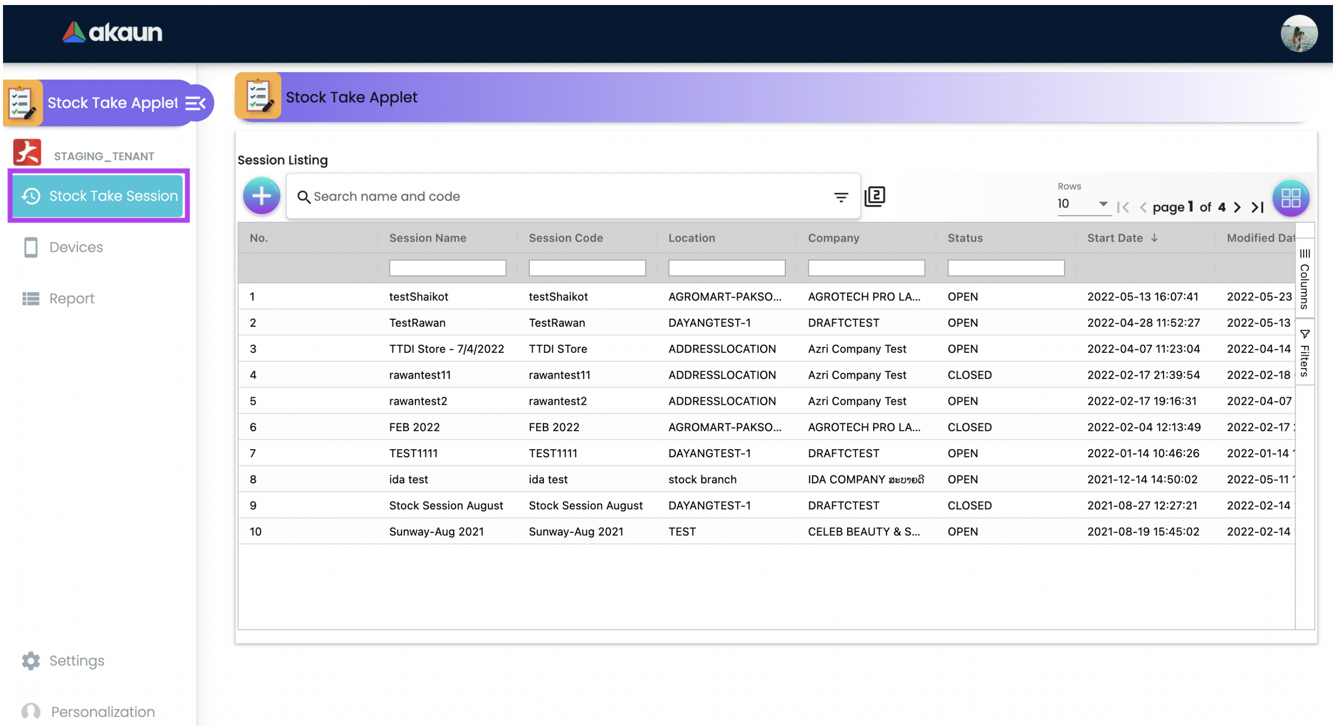
- Section 4.18, “Warehouse Management Module”
- Section 4.19, “Customer Data Platform”
- Section 4.20, “PGW Module”
- Section 4.21, “Chatbot Module”
- Section 4.22, “Process Automation Module”
- Section 4.23, “Datalake Module”

A.17.3. Menu 01 - Stock Take Session

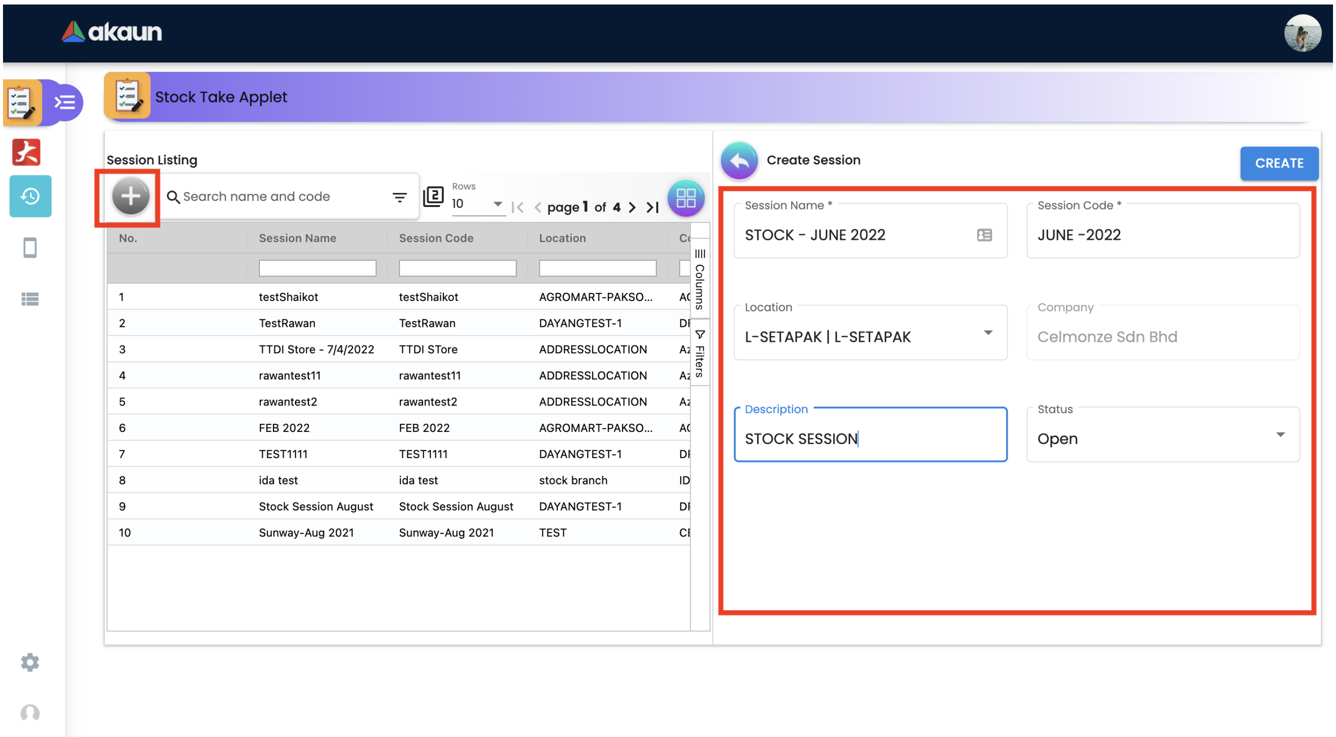
A.17.3.1. Please go to Akaun.com - Stock Take Applet V2



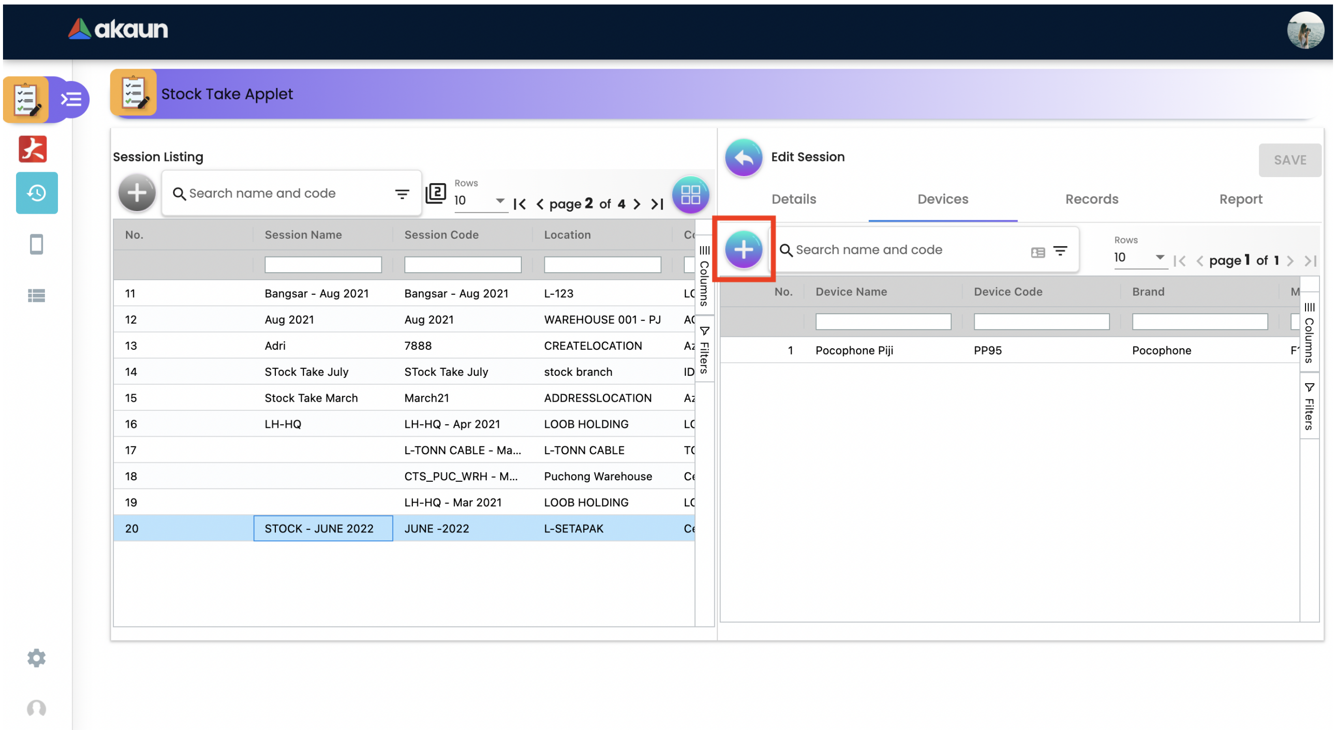
A.17.3.2. Go to the Stock Take Session



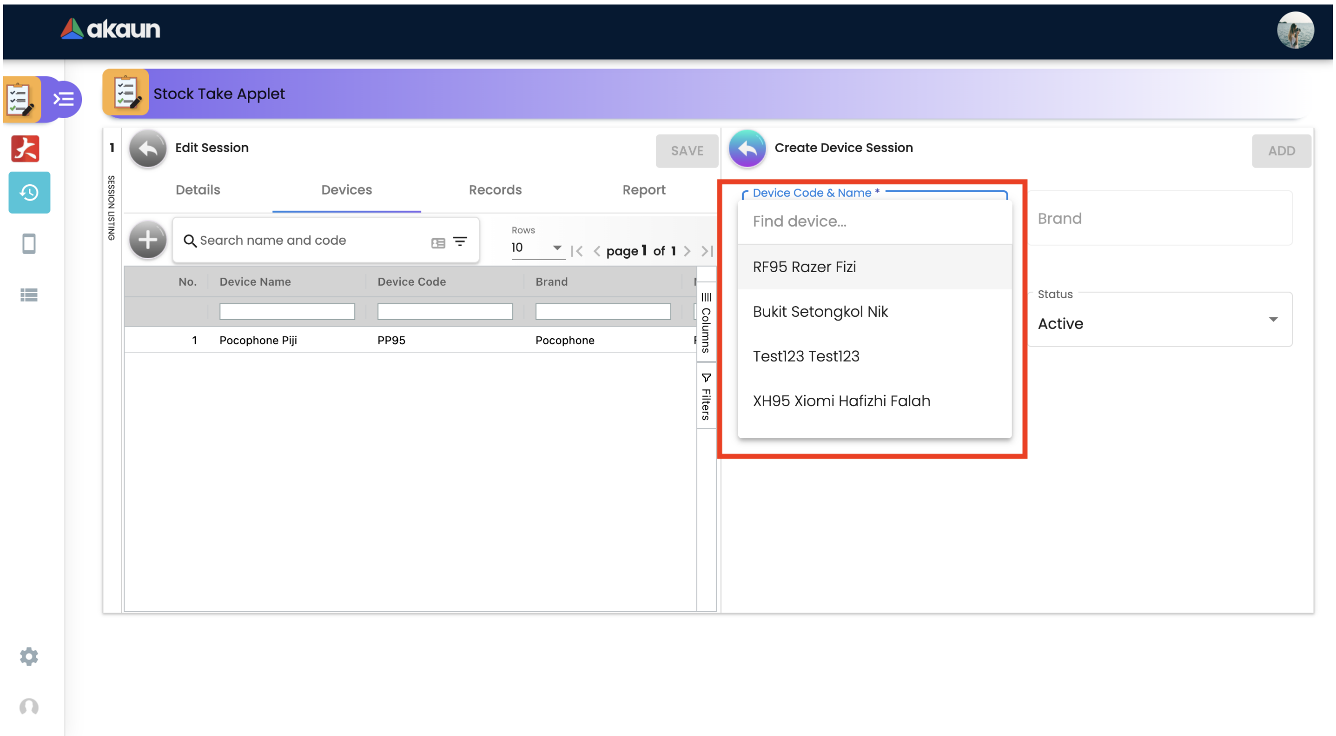
A.17.3.3. Create a Stock Take Session Ex: STOCK - JUNE 2022



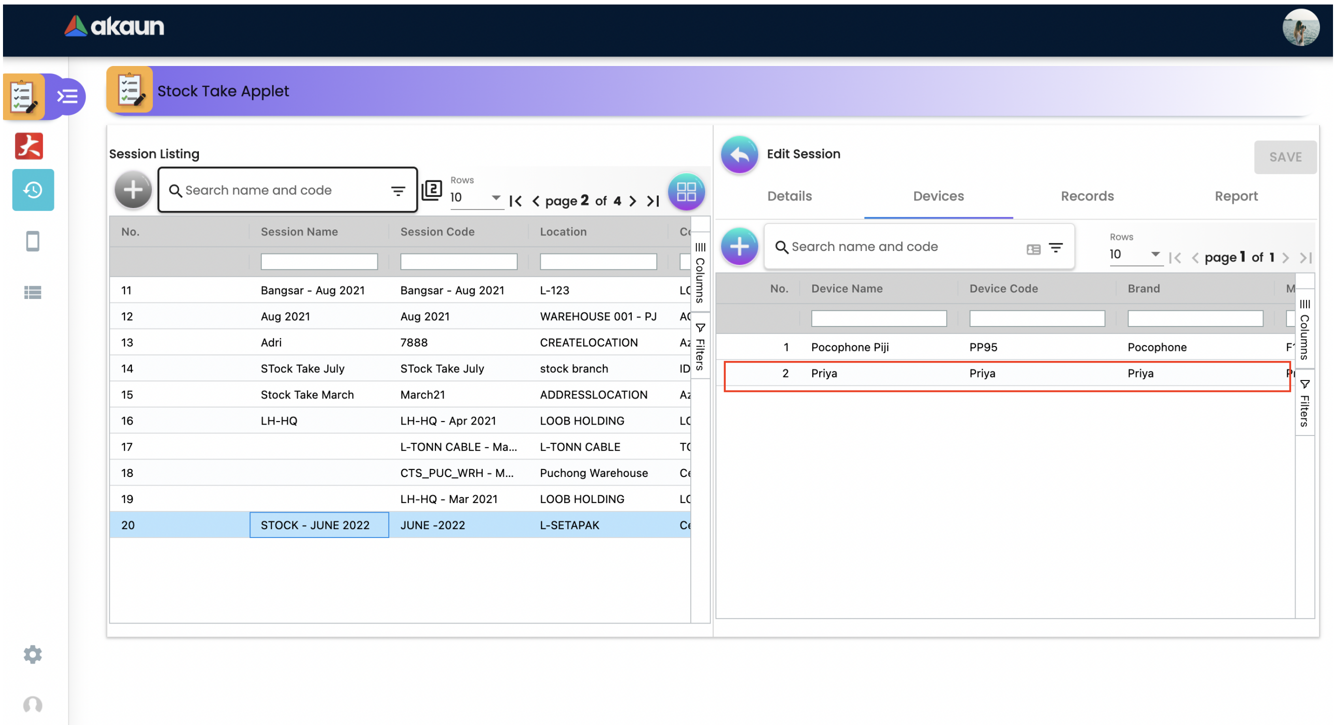
A.17.3.4. After creating the Stock Session, go to devices tab to add PIC for handling the Stock Take



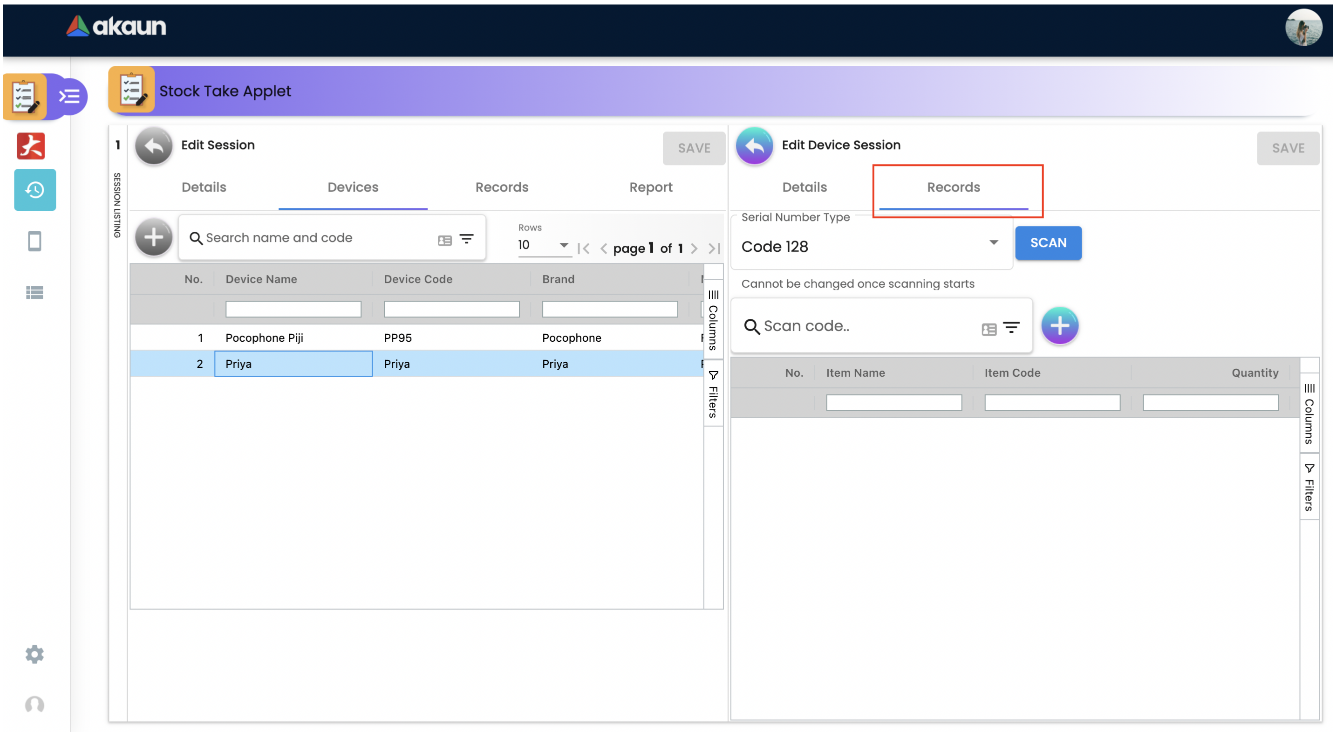
A.17.3.5. Find a PIC name to add under the created stock take Session



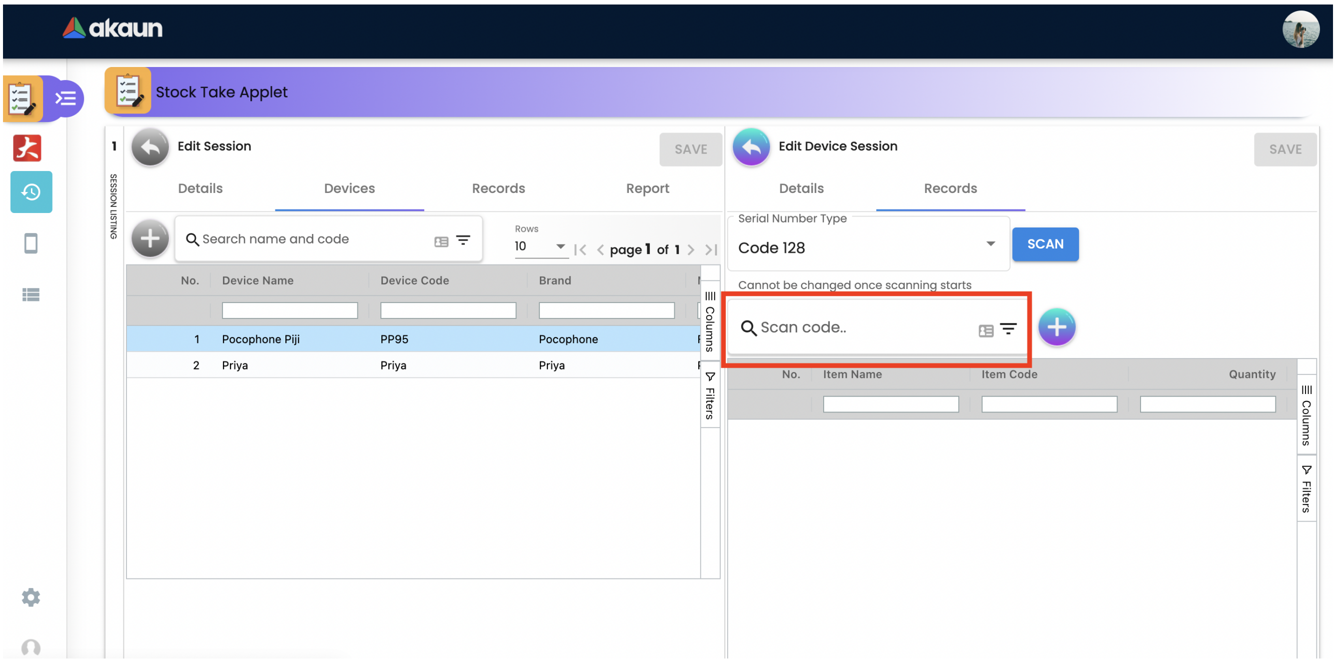
A.17.3.6. After selecting the PIC, go to the PIC name to start performing your Stock Take



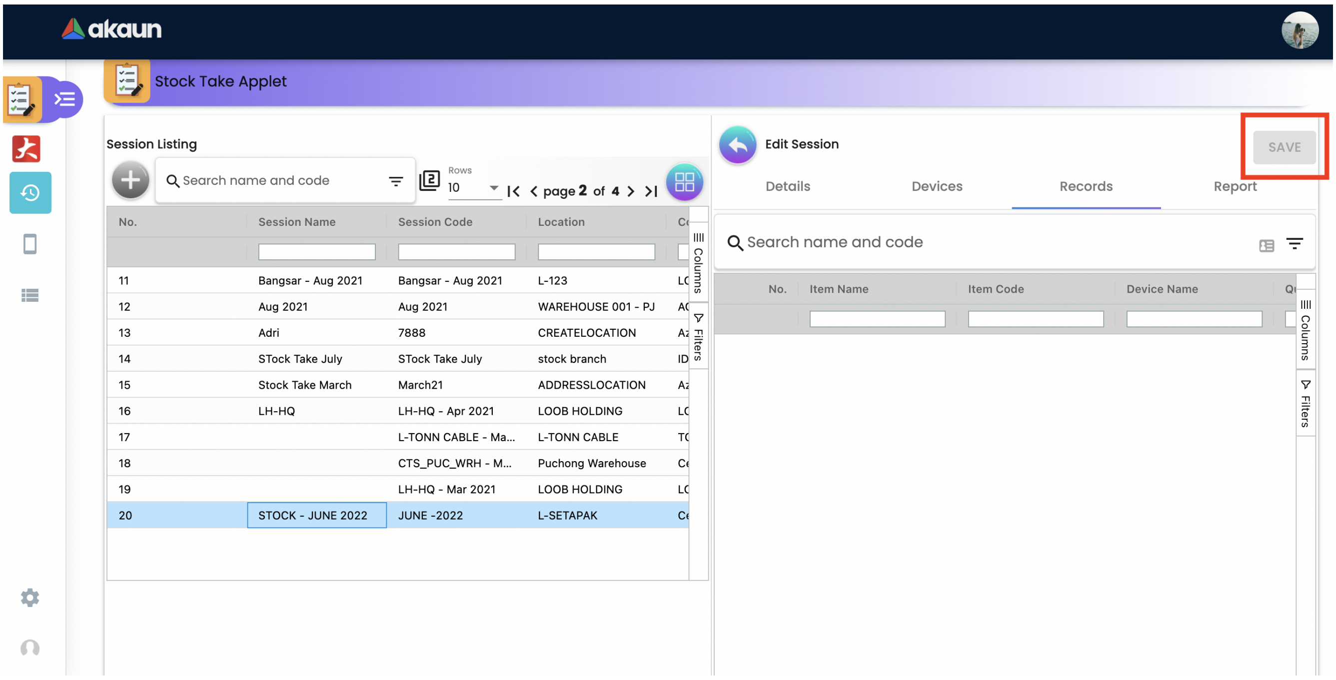
A.17.3.7. Once click into devices, please go to Records Tab



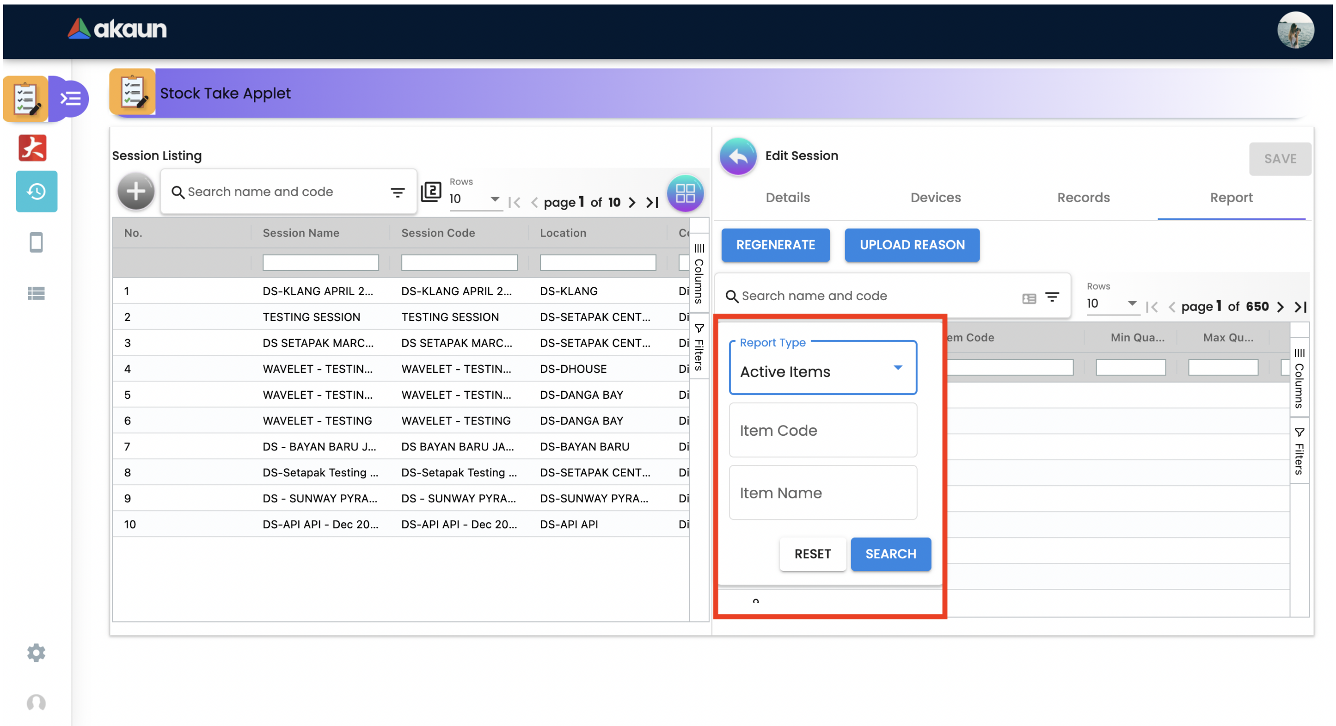
A.17.3.8. You can directly scan your serial number scan button



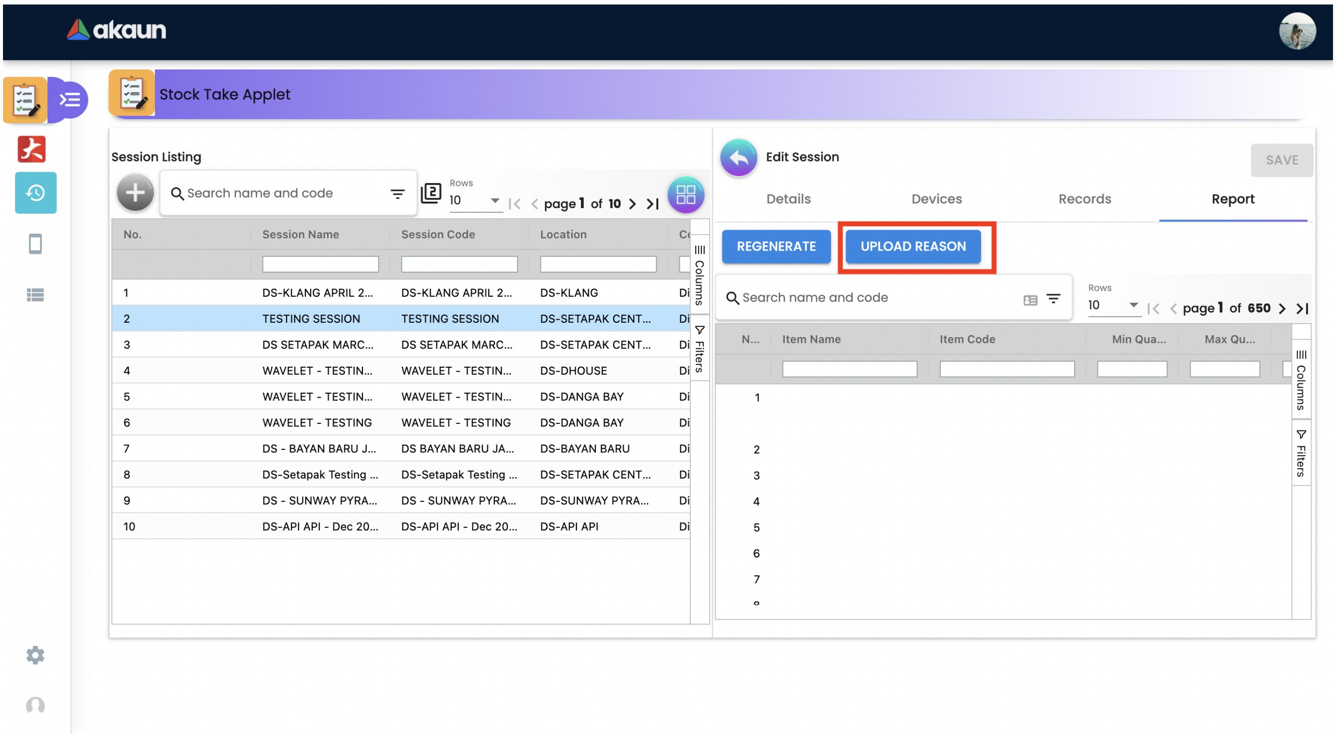
A.17.3.9. Auto-save feature is available



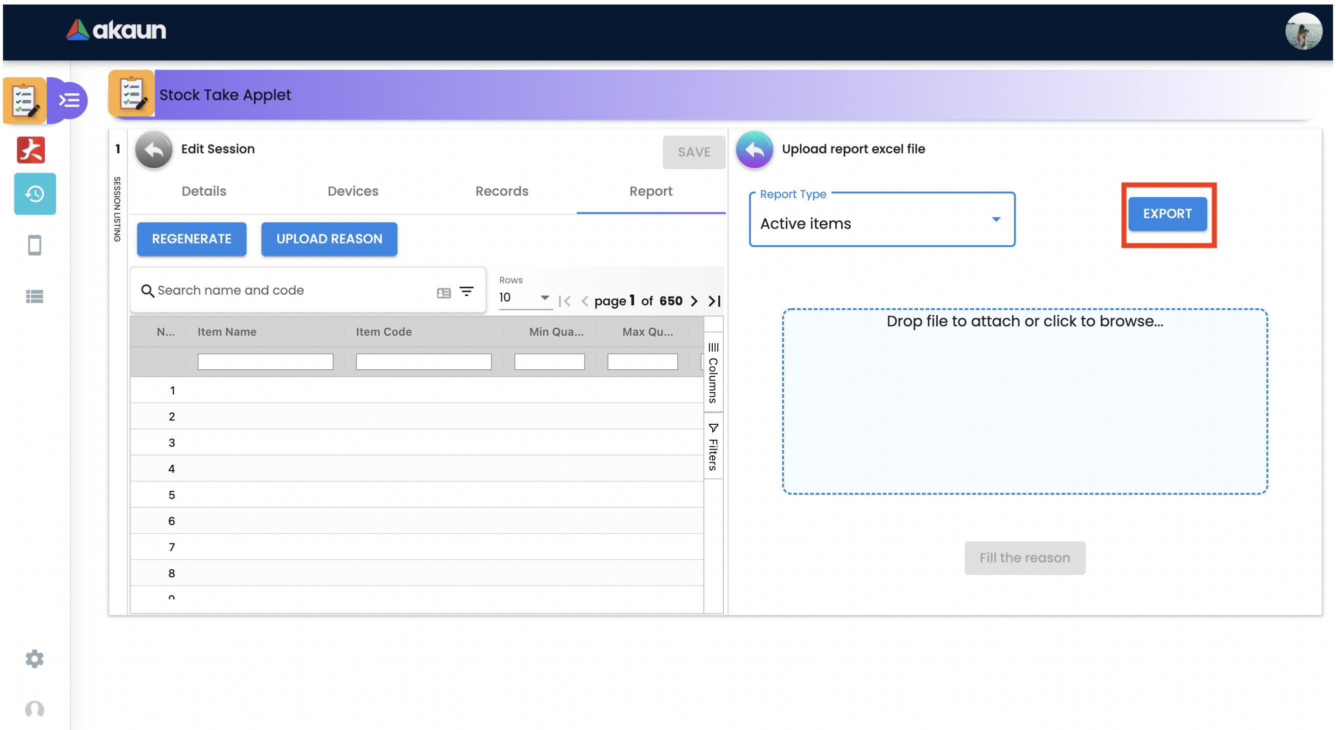
A.17.3.10. Once complete performing stock take, please go to the report tab. Filter by Report Type and click Search



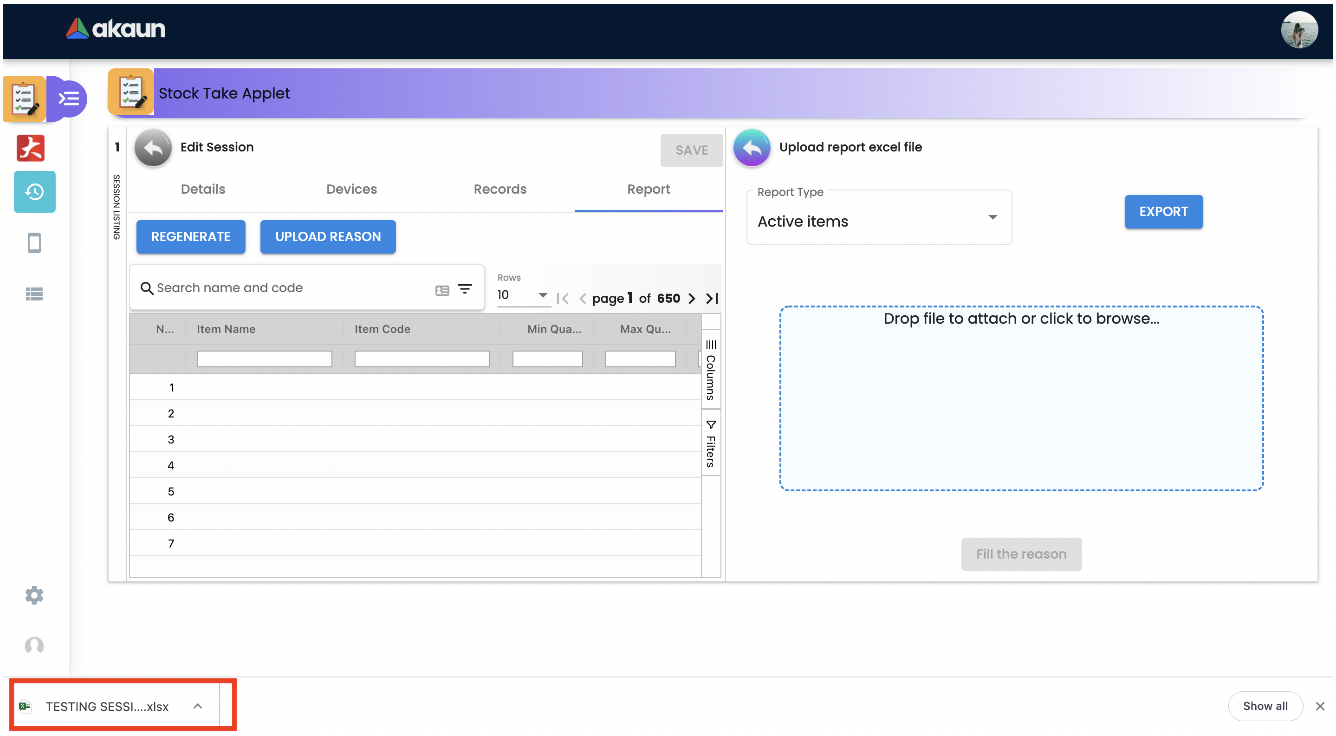
A.17.3.11. Click Upload Reason



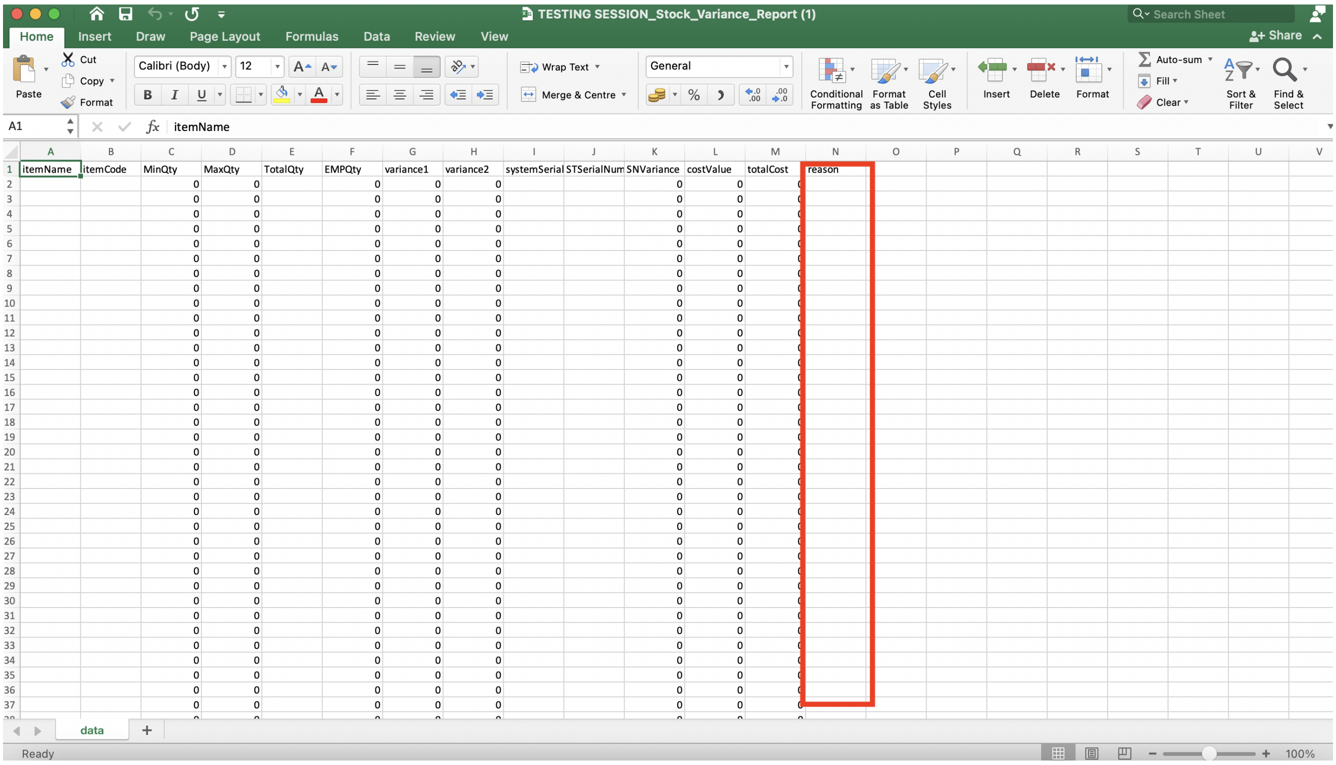
A.17.3.12. Select report type and export the report in excel



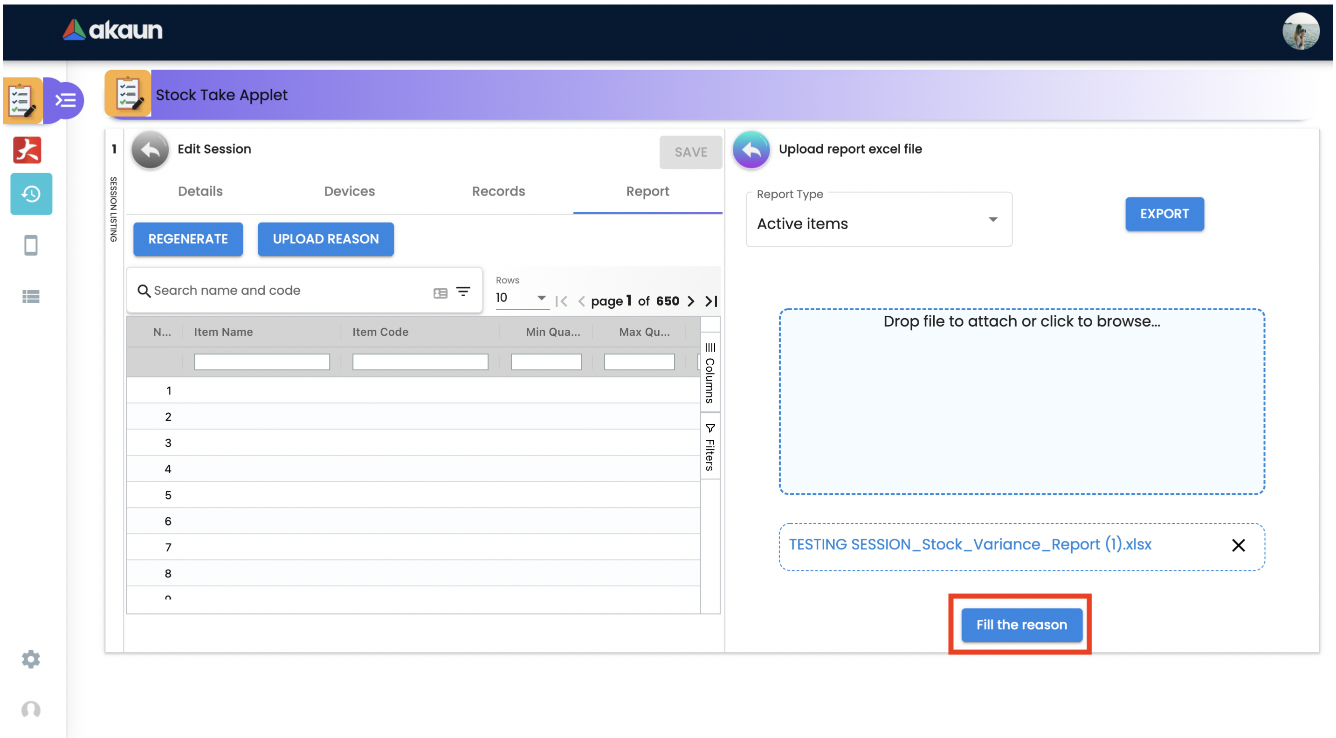
A.17.3.13. An excel will be dowloaded



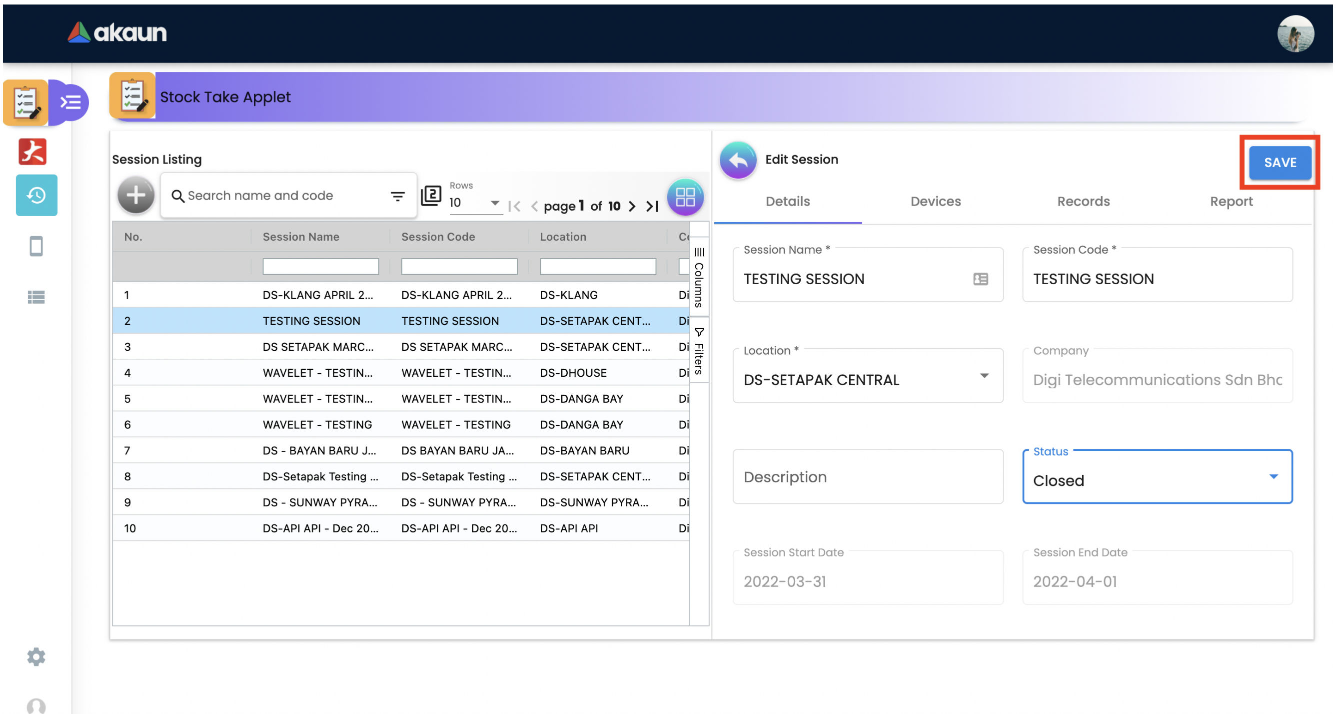
A.17.3.14. Fill up a reason for an item that has variance



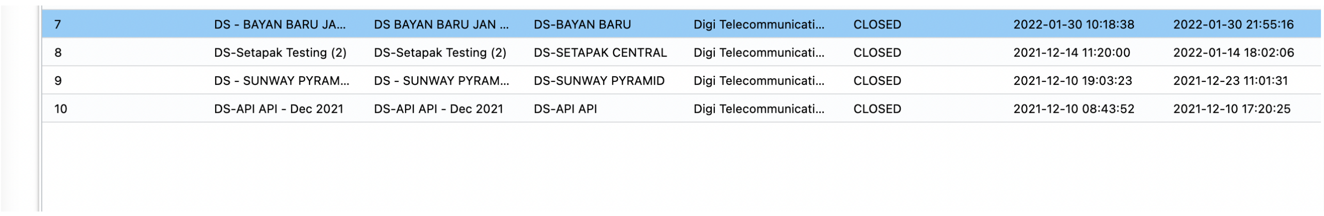
A.17.3.15. Save the file and reupload into Stock Take Applet



A.17.3.16. Once uploaded, go to the details tab and change the status to closed, then click save.

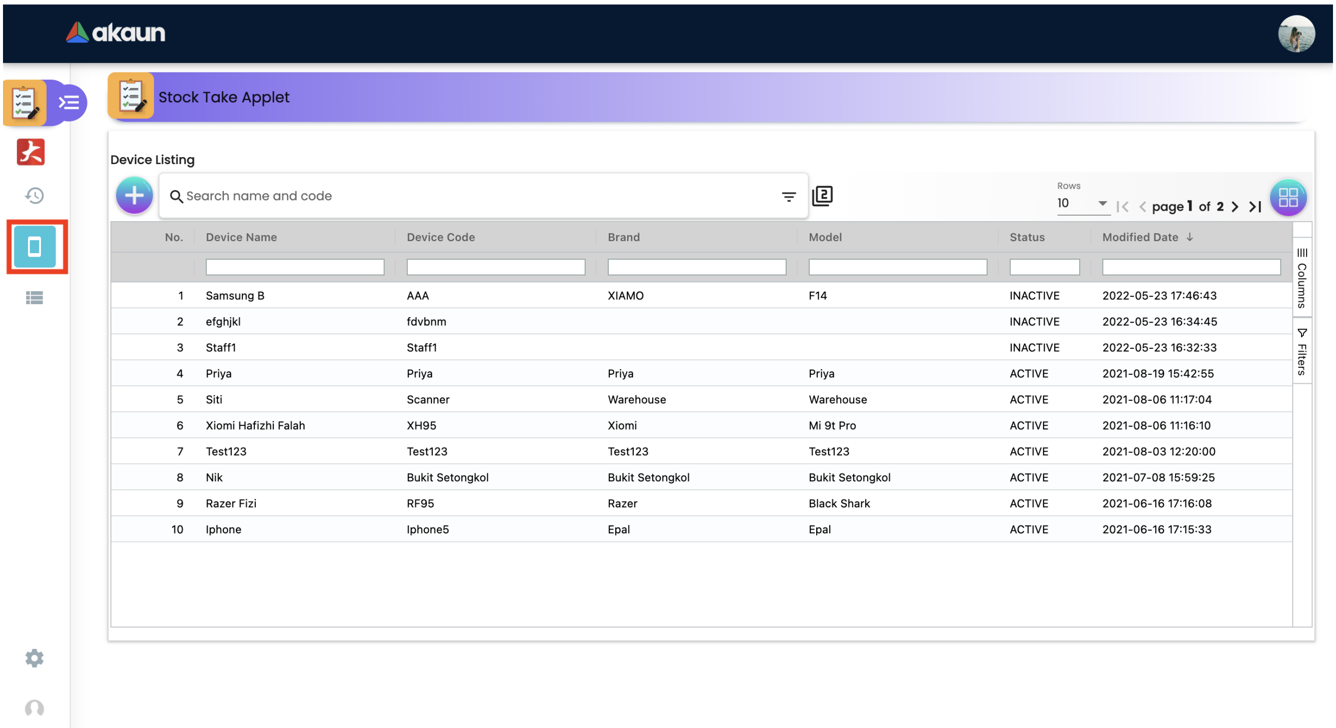


A.17.3.17. Ammendment and Adjustment can’t be made once the stock take has Closed

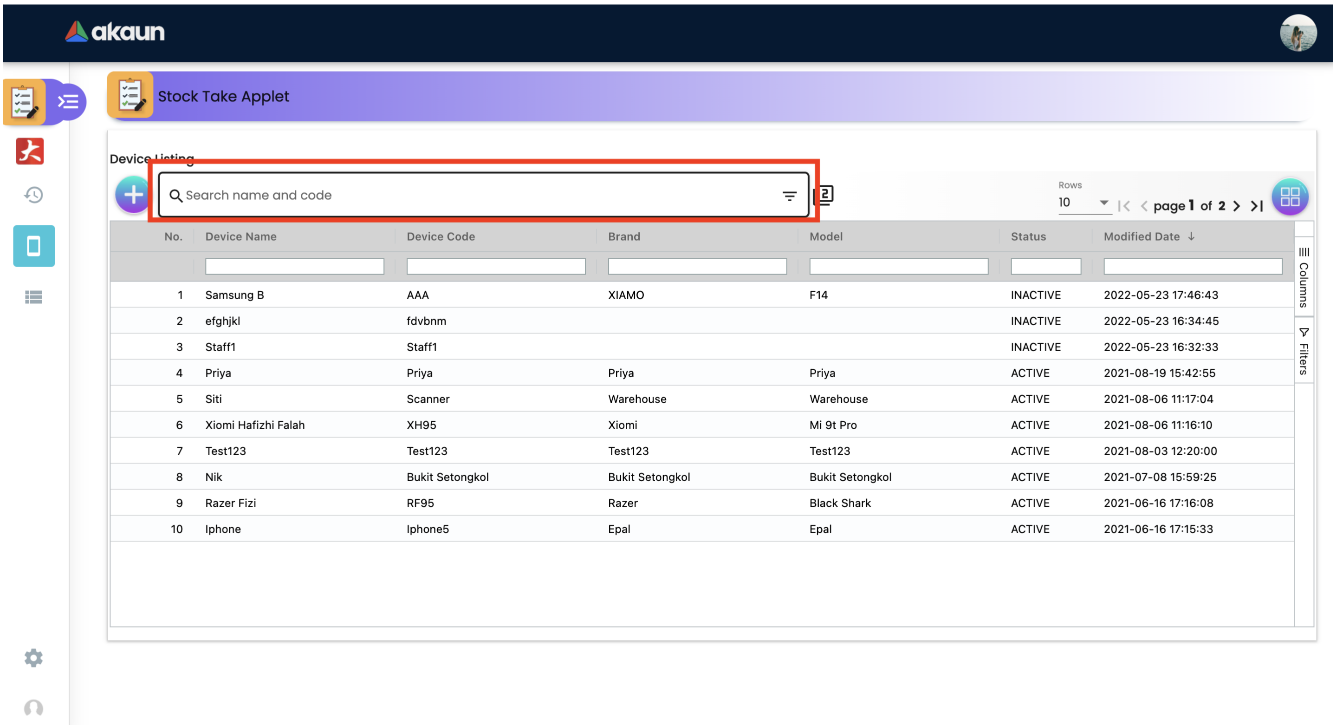


A.17.4. Menu 02 - Devices

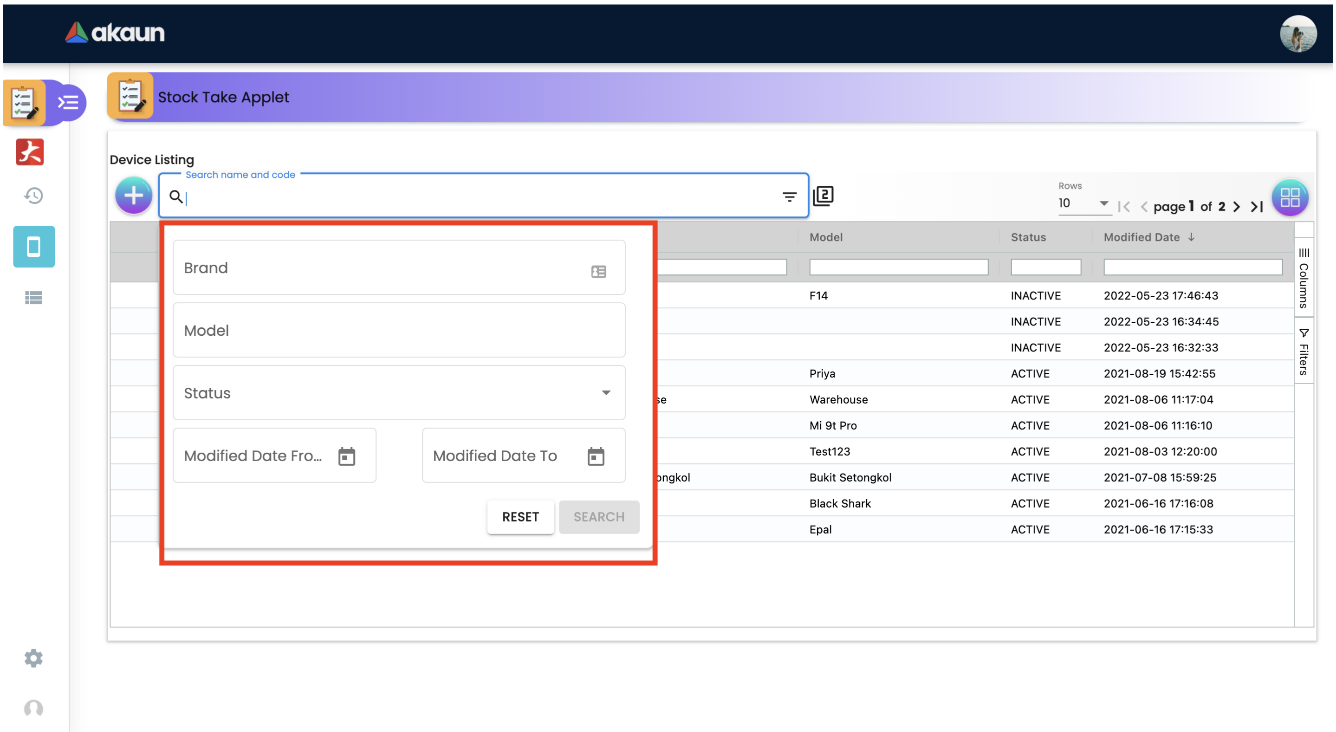
2.1 Go to the device menu to create Device. The Device will be used to assign to the stock take session



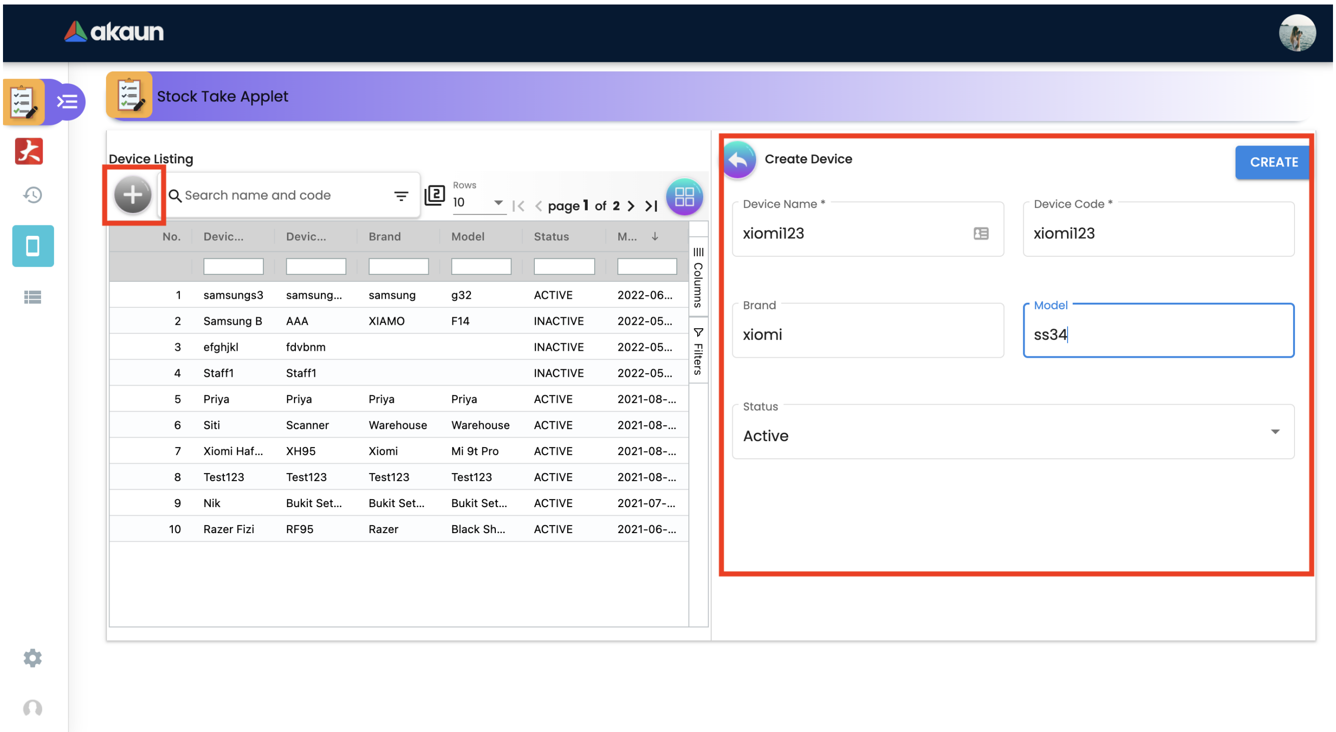
2.2 Search box is for search for Device Code and Device Name



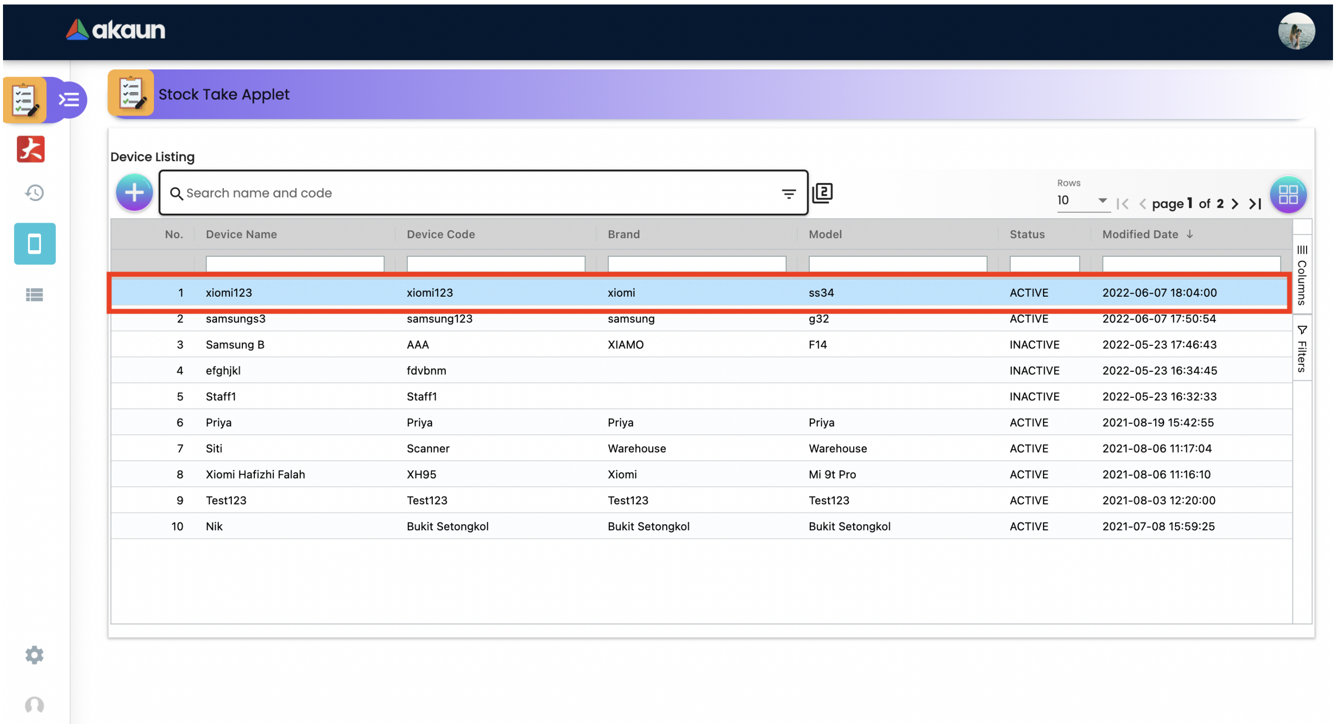
2.3 Advanced Filter search is to search based on brand, model, status and date.



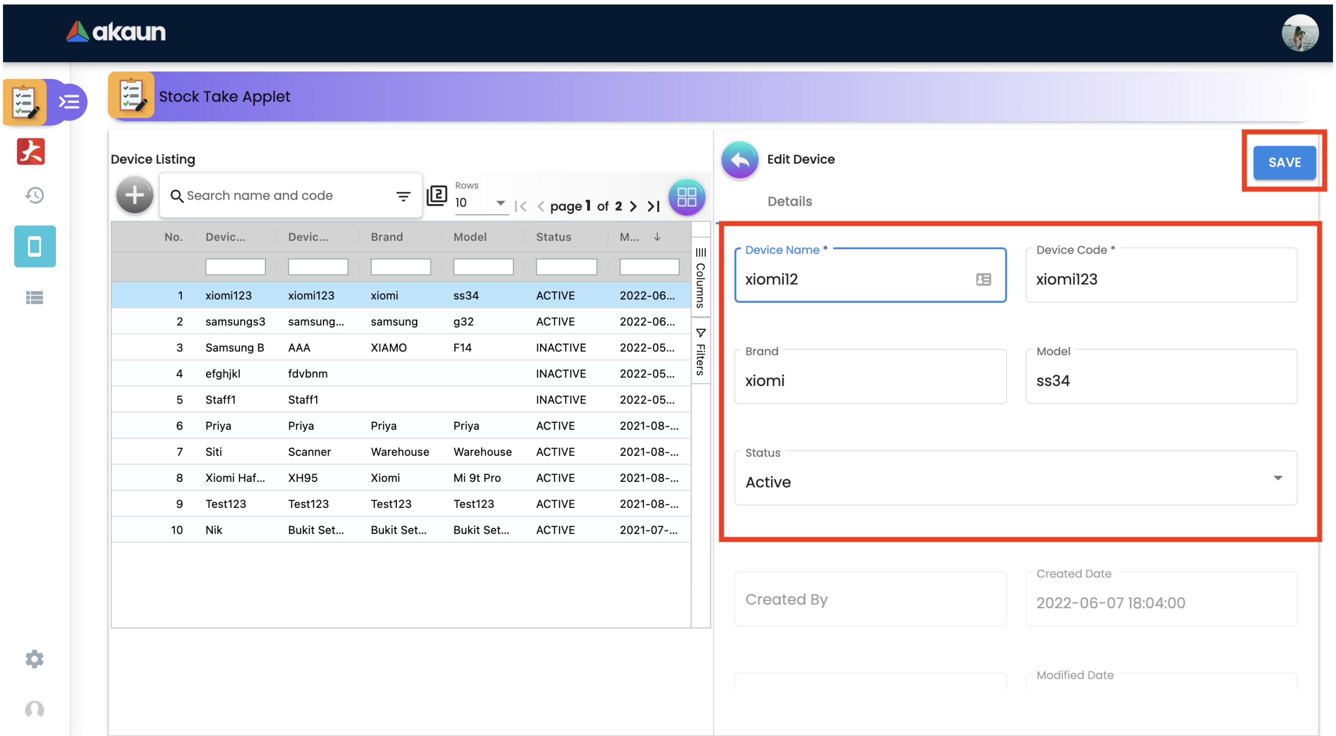
2.4 Click "+" button to create new Device and fill in the required fields



2.5 Click Create button and Device Listing will show the recent device created top of the listing

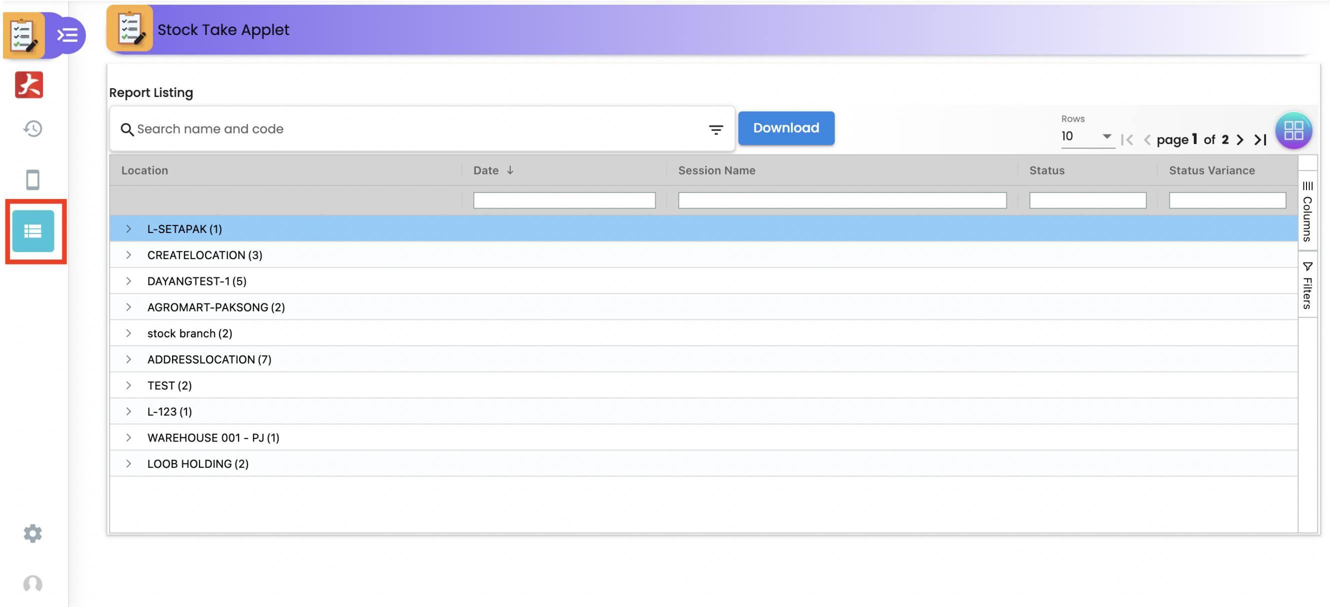


2.6 Once click at the specific device, edit the highlighted fields and click button to save changes



A.17.5. Menu 03 - Reports

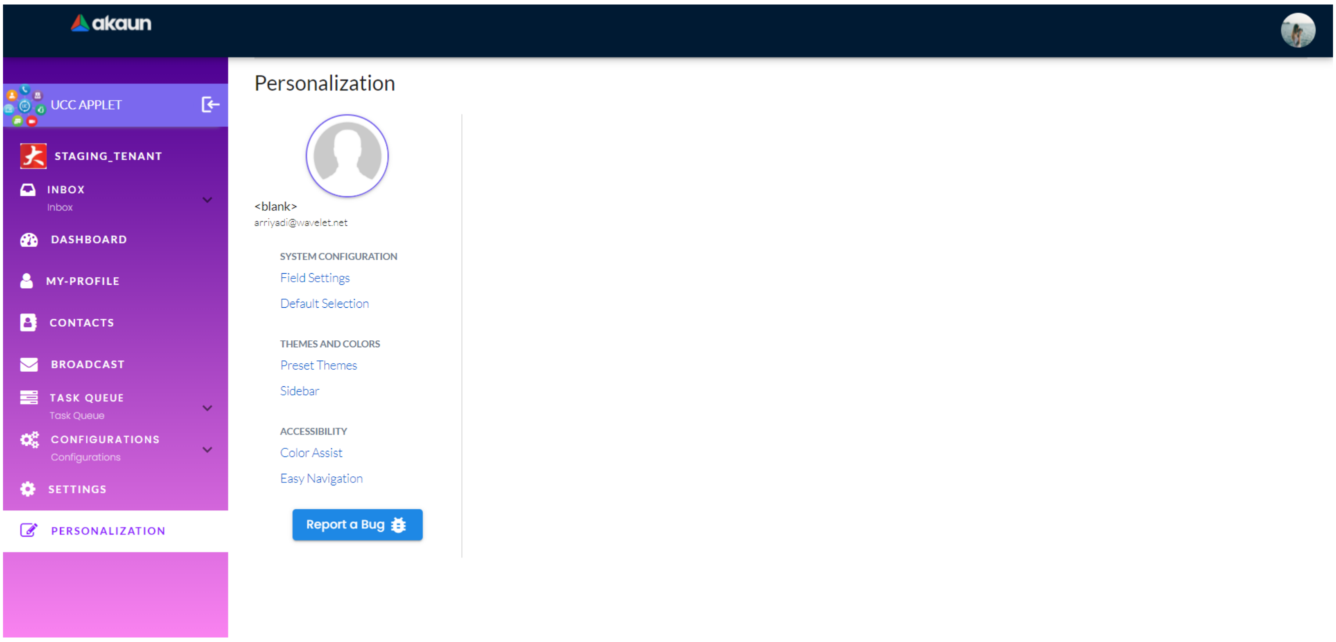
3.1 After closing Stock Take session, you may click on to the reports menu to view stock take listing



A.17.6. Permission Settings

A.17.7. Personalization

Go to the Personalization Menu to add or edit Profile



A.17.8. 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.17.9. Pricing

A.17.10. Release Note

A.17.11. Roadmap

A.18. Supplier Maintenance 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. Tax Configuration 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. UCC Applet

A.20.1. Introduction

Unified Contact Center (UCC) Applet is now available in the Applet Store. UCC Applet handles omnichannel conversations and provide superior customer service experience which will allow the users to be able to send and receive messages from multiple messaging platforms in a single applet.

Besides, UCC applet provides the function of shopping cart, users can send the payment link to customer, then the payment status will show up in UCC.

The UCC Applet consists of nine (9) main modules which are Inbox, Dashboard, My-Profile, Contacts, Broadcast, Task Queue, Configurations, Settings and Personalization.

A.20.2. Modules

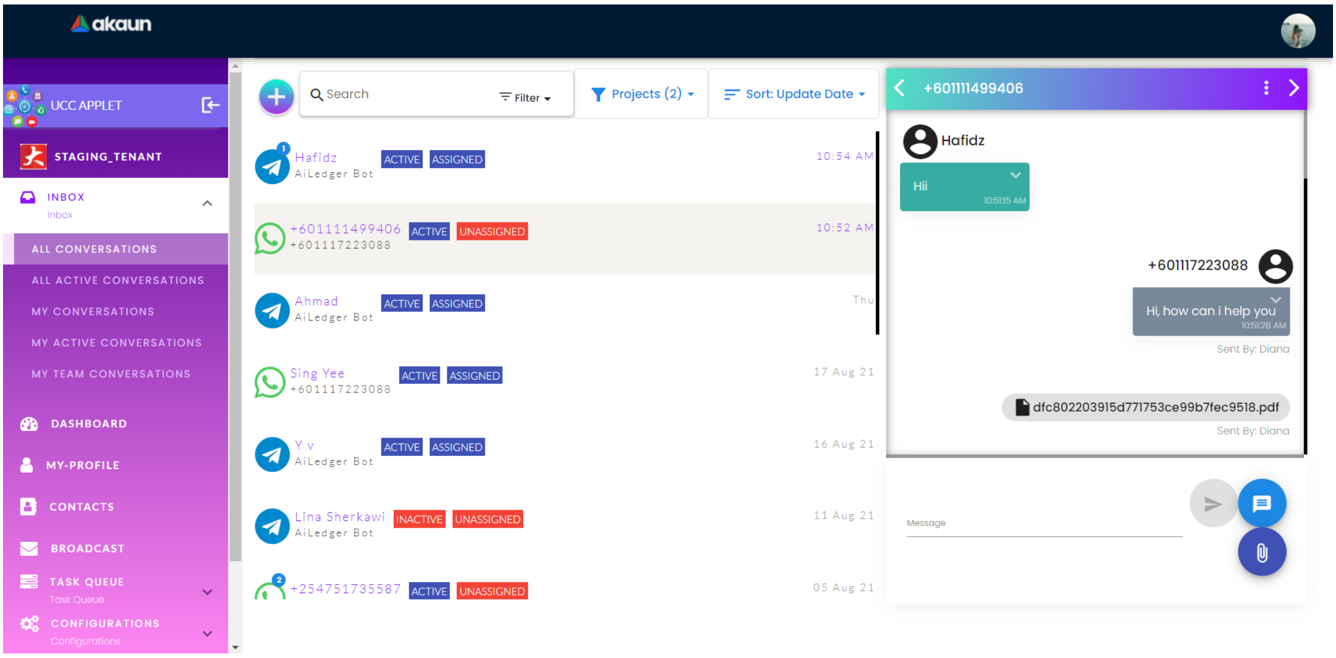
This applet is used in the following modules:

- 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"

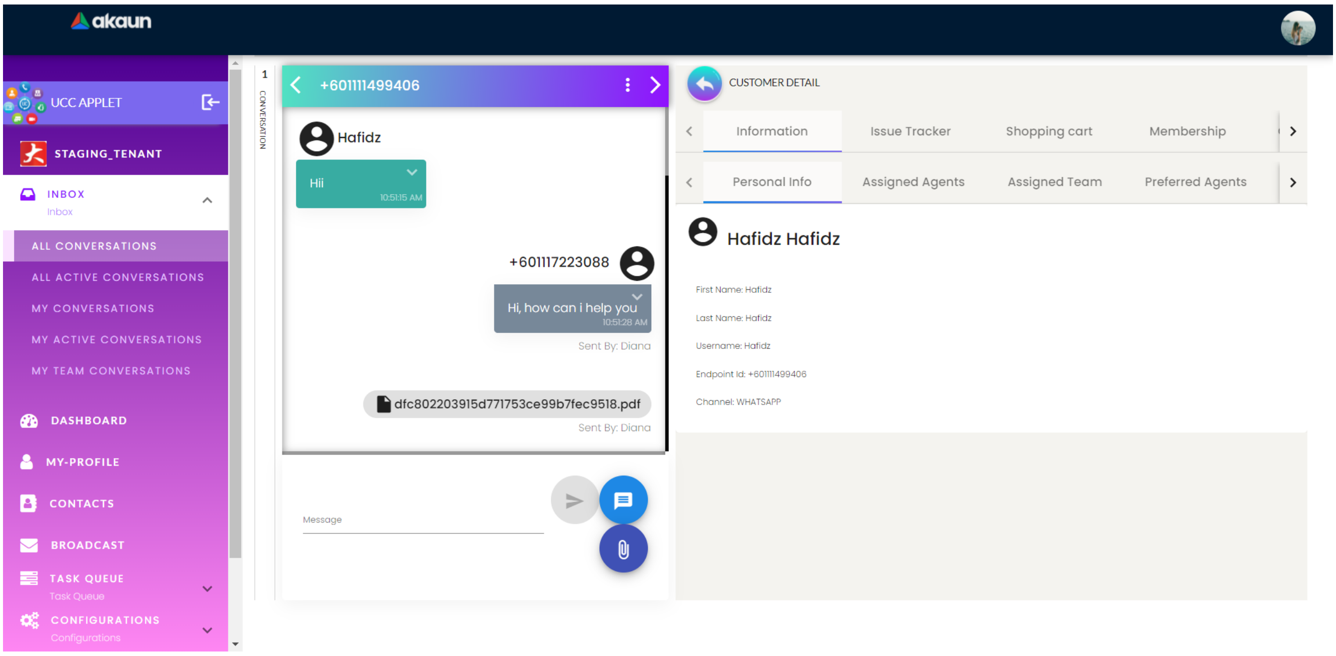
- Section 4.16, “HR Module”
- Section 4.17, “Order To Cash Module”
- Section 4.18, “Warehouse Management Module”
- Section 4.19, “Customer Data Platform”
- Section 4.20, “PGW Module”
- Section 4.21, “Chatbot Module”
- Section 4.22, “Process Automation Module”
- Section 4.23, “Datalake Module”

A.20.3. Menu 01 - Inbox

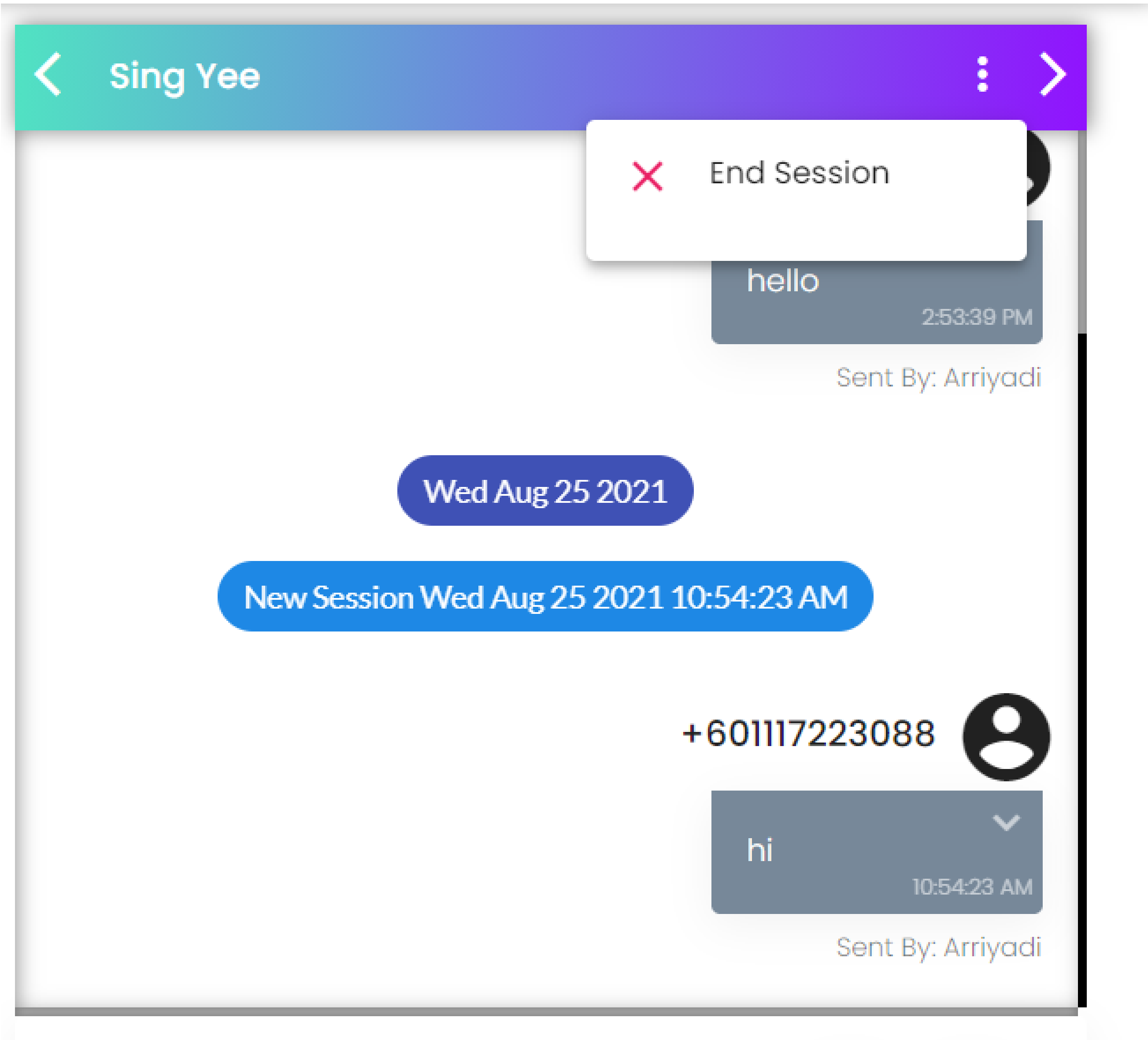
The inbox menu consists of all kinds of conversations from multiple messaging platforms. A user can send several types of messages, inclusive of: Predefined Messages, attachments such as location, contact card, audio, documents, photos & videos.



By clicking the > symbol on the top right corner of the chat box, user can view customer details such as Information, Issue Tracker, Shopping Cart, Membership and Contact Merging.

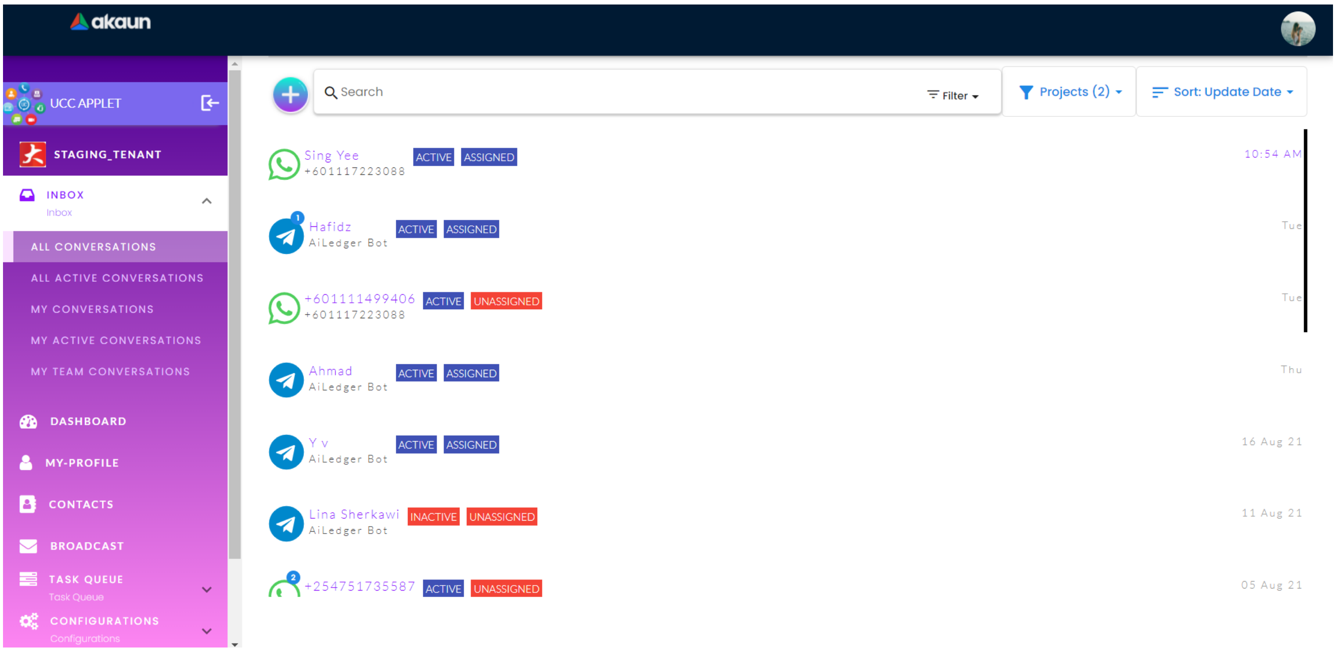


The session is started when the end user sends a message to the business virtual contact. To end a session, user may click the 3 dots on top of the chatbox to end the session.



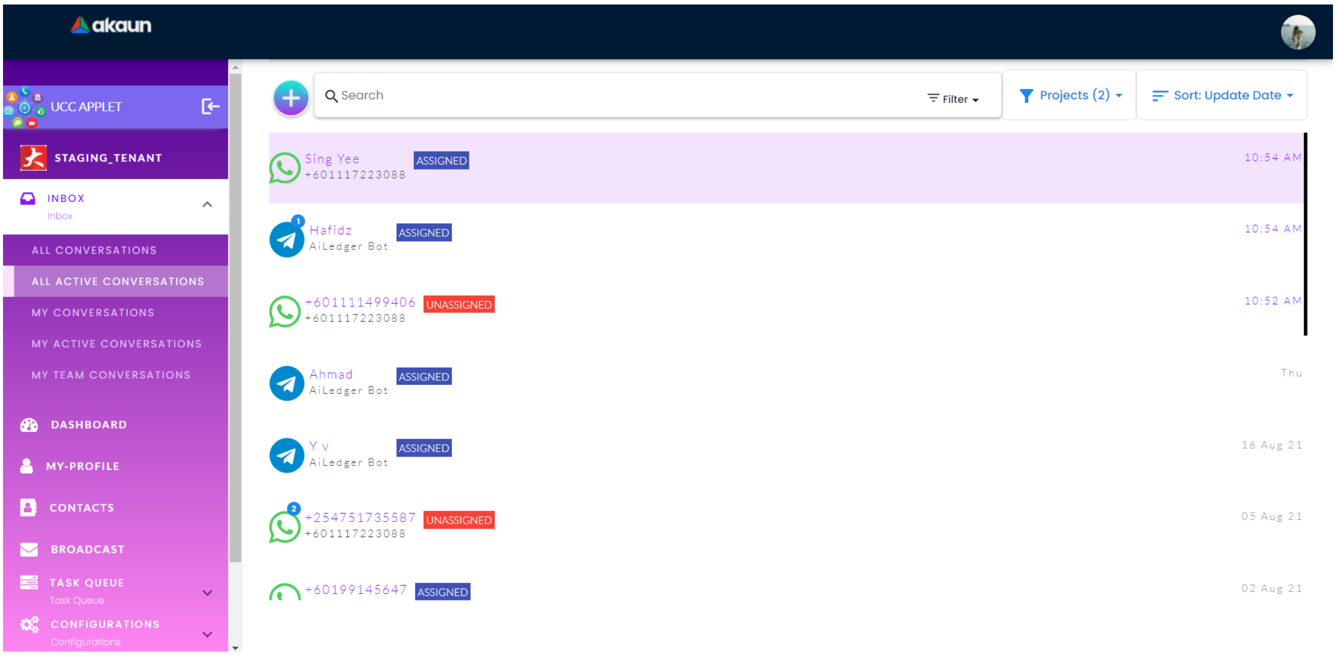
A.20.3.1. All Conversations

By clicking All Conversations, the user can view all conversation under this menu.



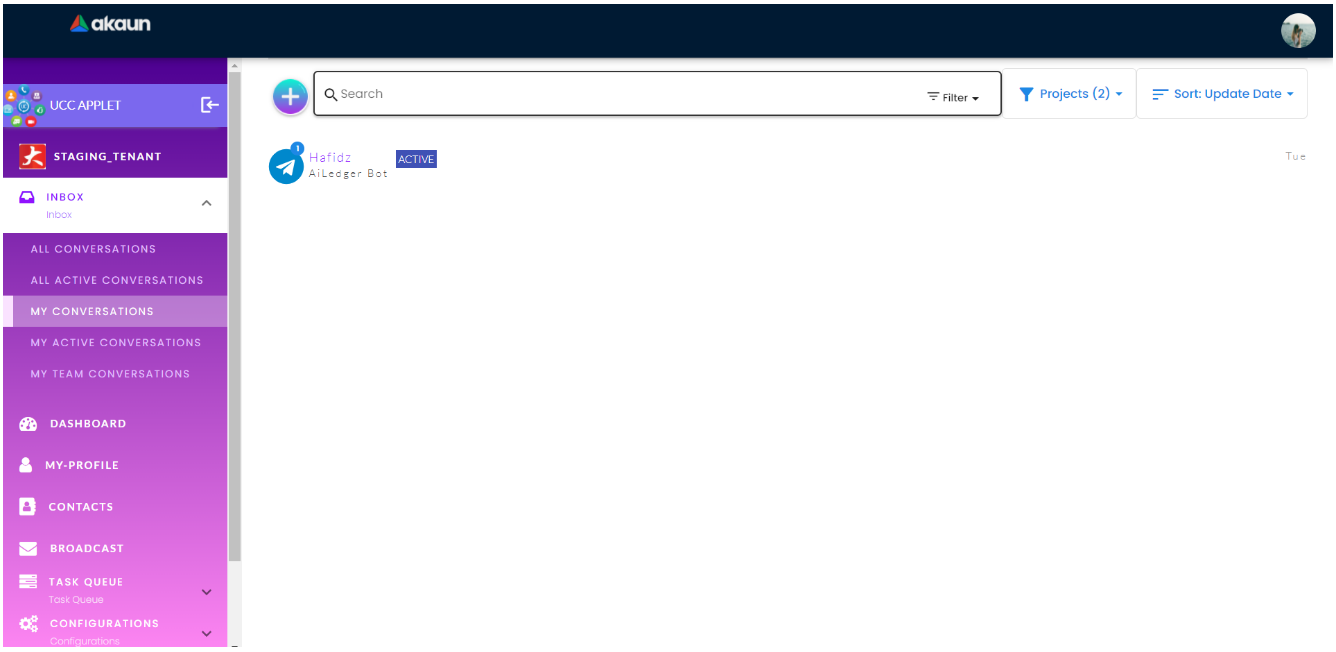
A.20.3.2. All Active Conversations

By clicking All Active Conversations, the user can view all active sessions conversation under this menu



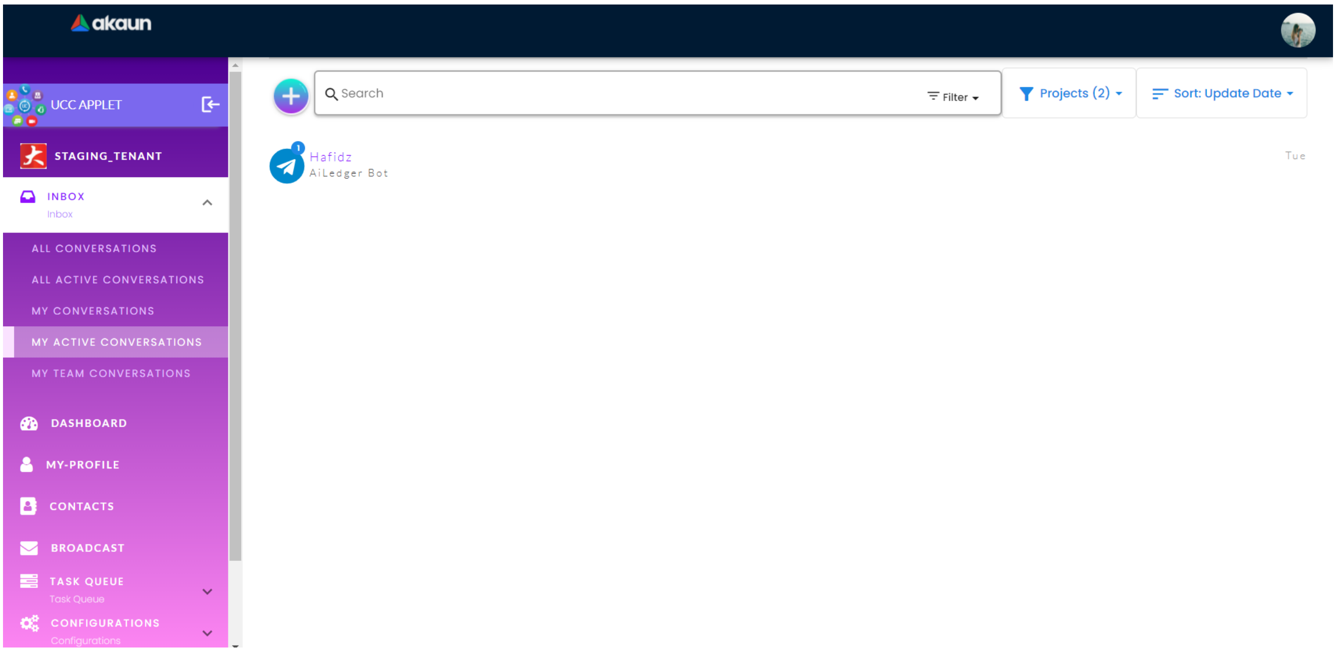
A.20.3.3. My Conversations

By clicking My Conversations, the user can view his/her own conversation under this menu.



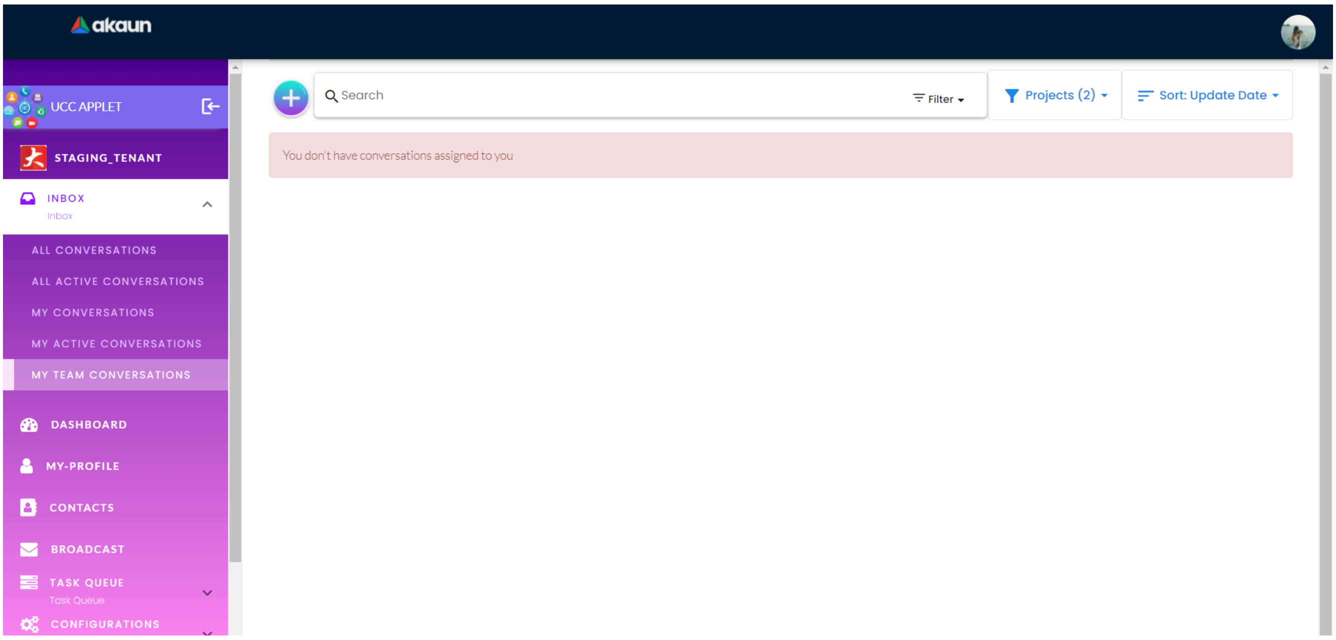
A.20.3.4. My Active Conversations

By clicking My Active Conversations, the user can view his/her own active sessions conversation under this menu.



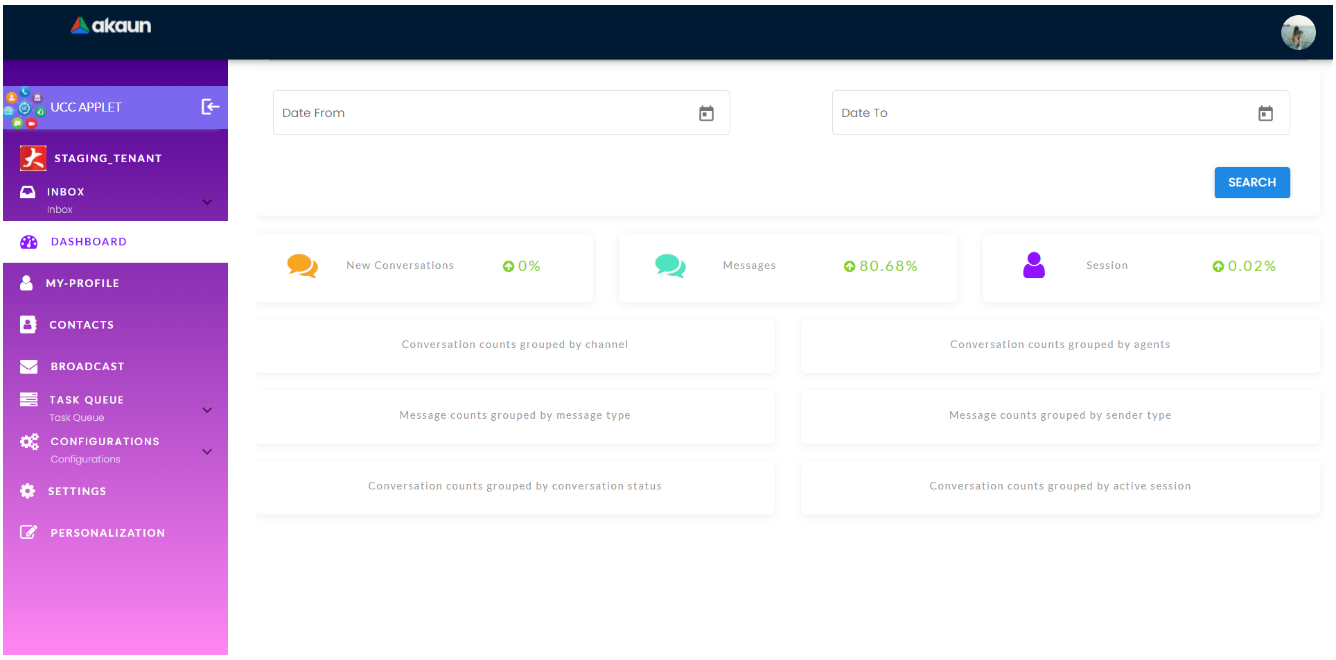
A.20.3.5. My Team Conversations

By clicking My Team Conversations, the user can view the team conversations that assigned to the user under this menu.

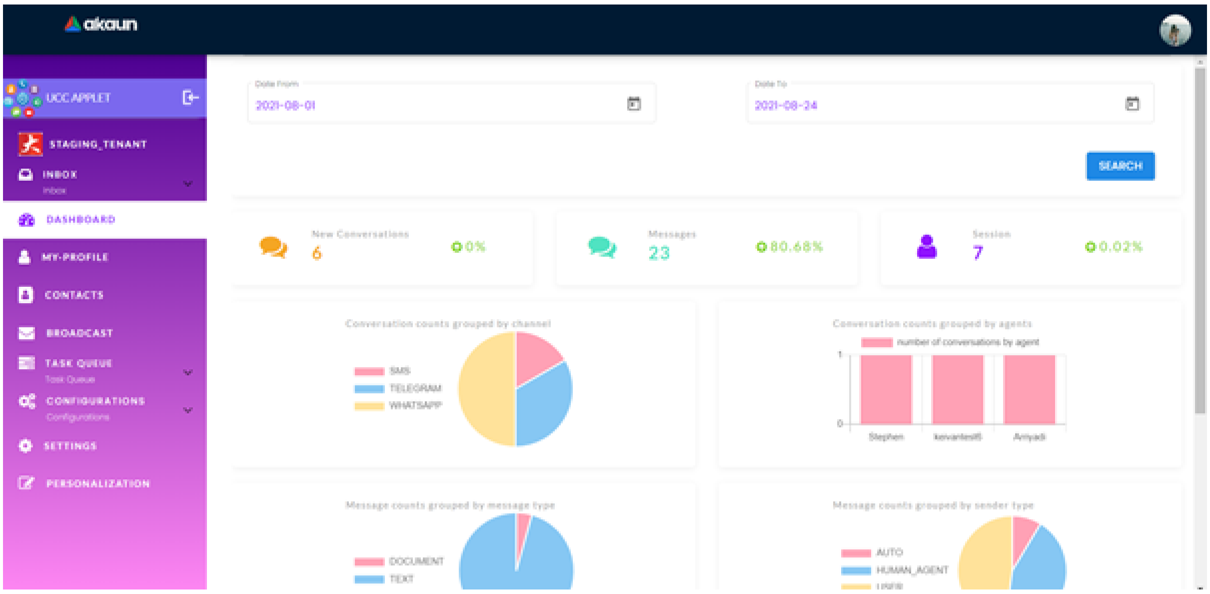


A.20.4. Menu 02 - Dashboard

Dashboard can be viewed after setting date duration.

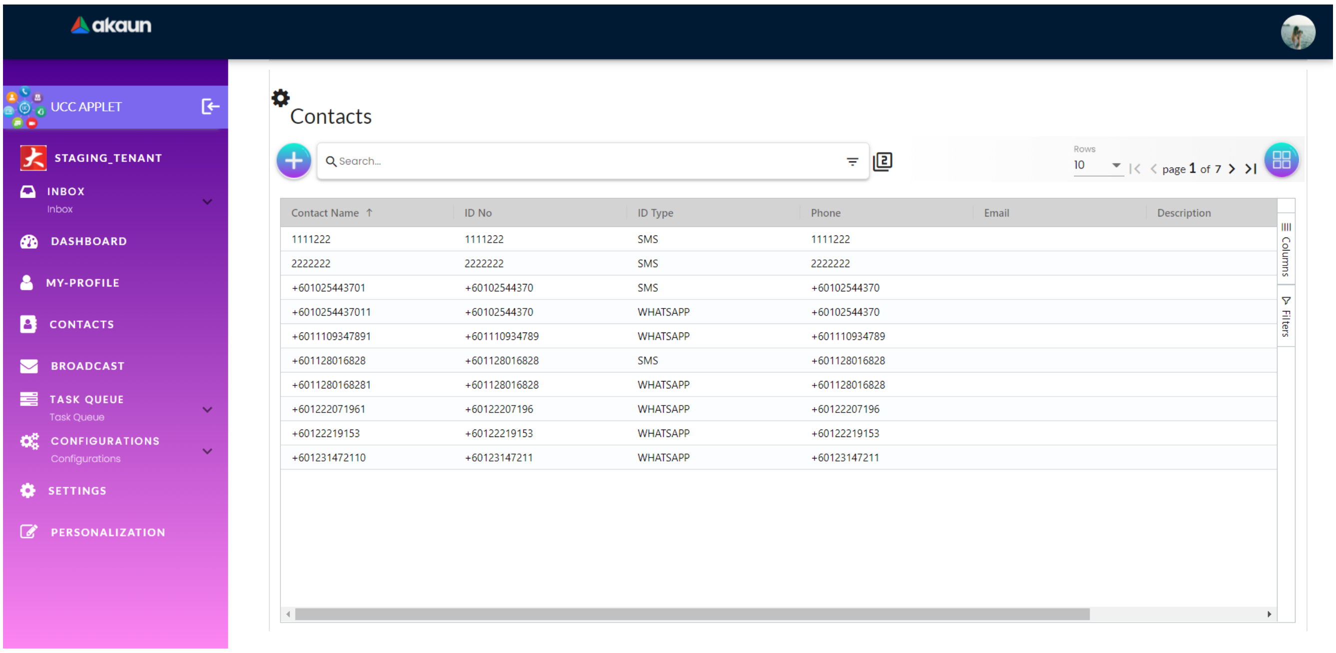


User can check how many new conversations were created, how many messages were sent and how many sessions were created within the time frame. Besides, a user can view several dashboards such as conversations counts grouped by channel, agents, message type, sender type, conversation status and active sessions.

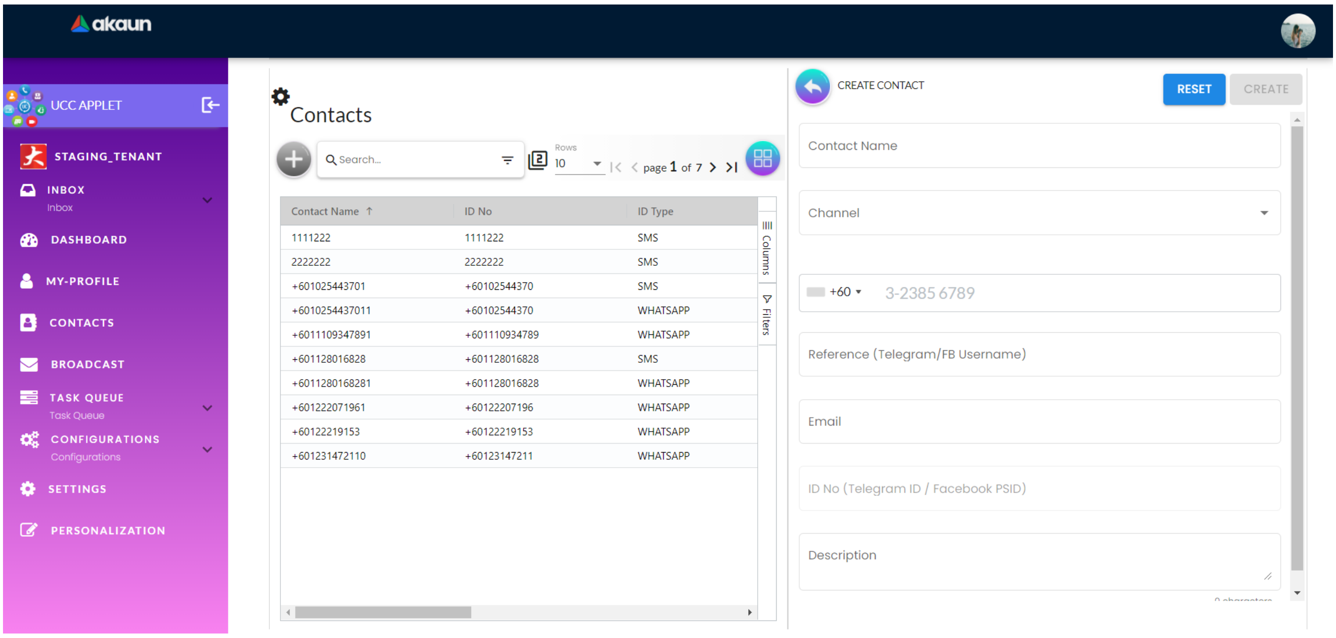


A.20.5. Menu 03 - My Profile

A user can view the list of contacts in this menu.

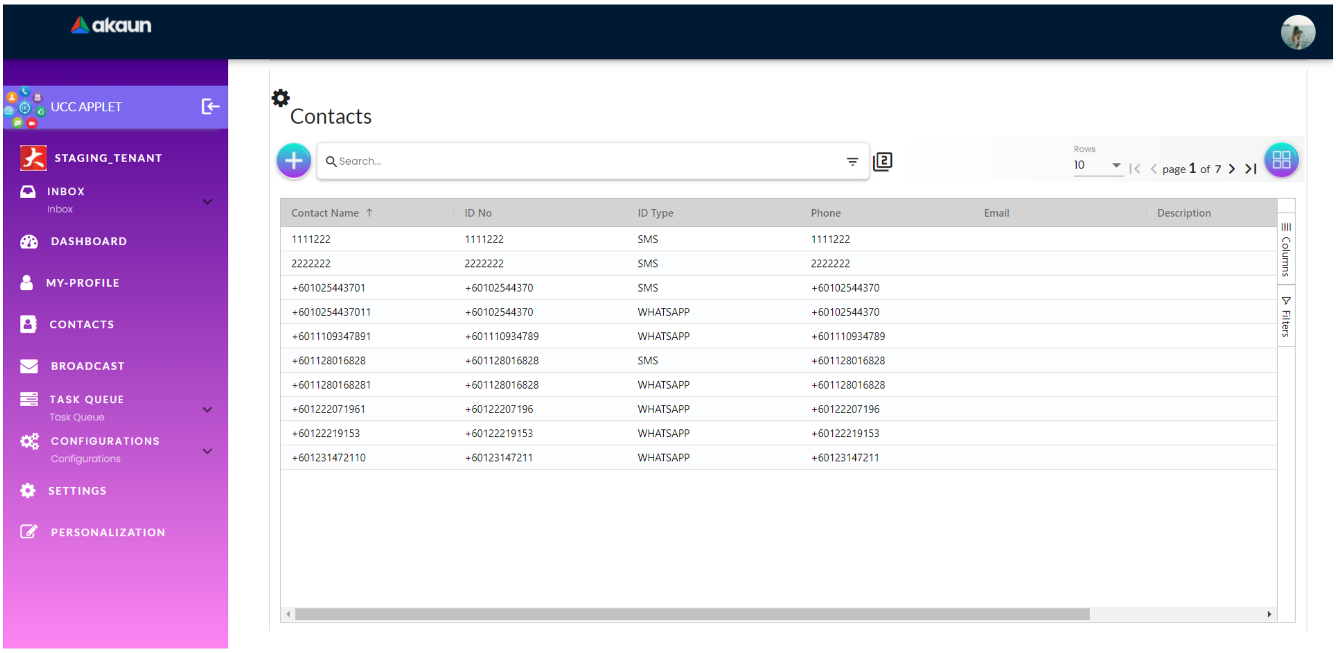


Profile details can be edited under ‘Settings’ tab.

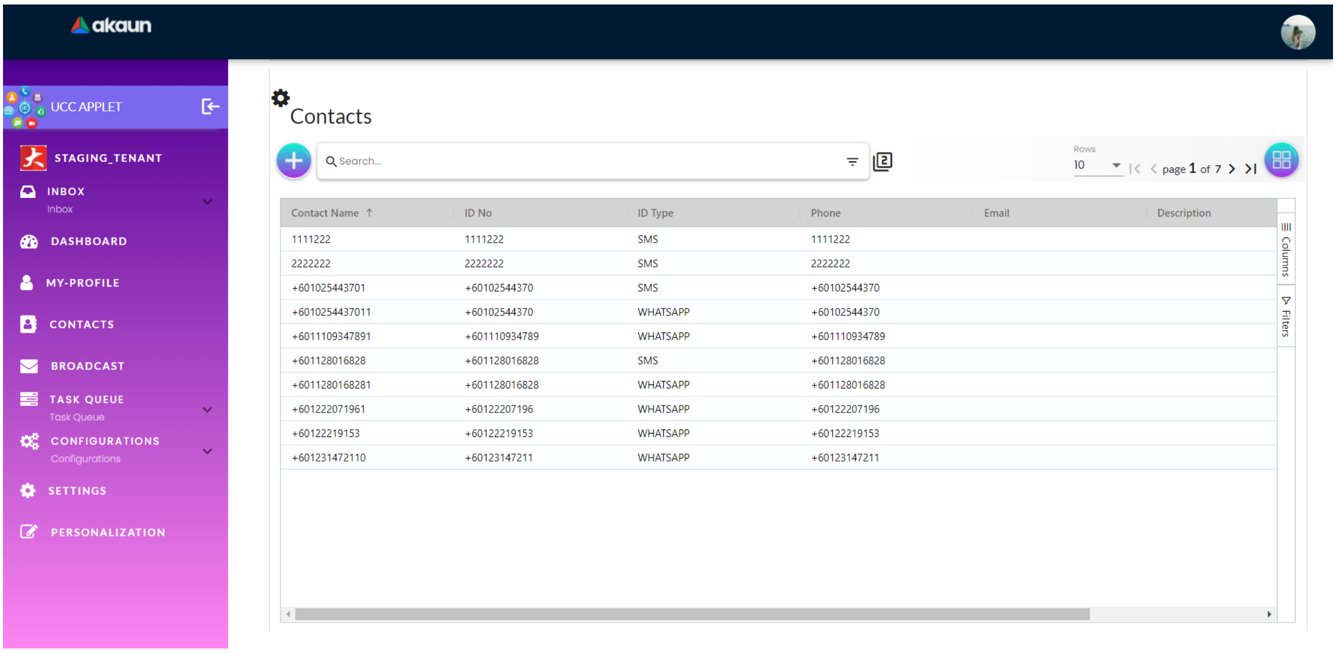


A.20.6. Menu 04 - Contacts

User can view the list of contacts in this menu.

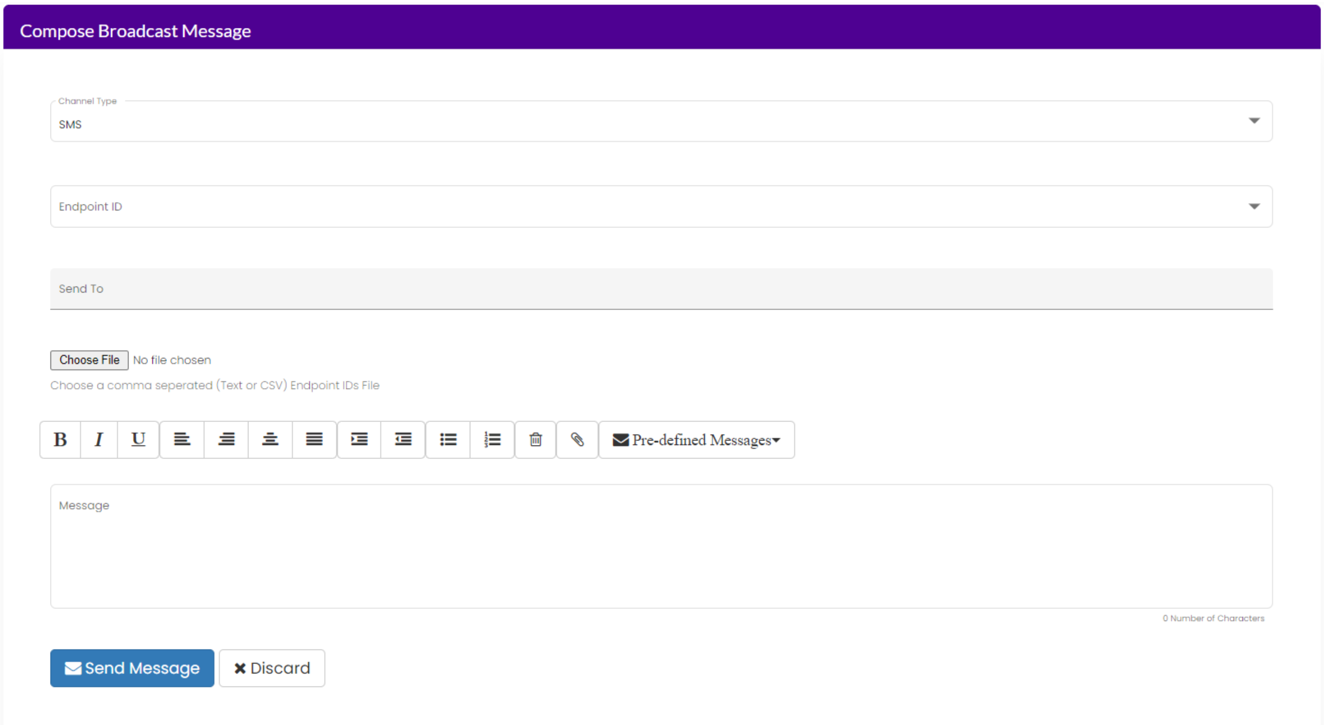


By clicking the + symbol, user can create contacts for multiple channels, namely: SMS, Telegram, Whatsapp, FB Messenger and Email.



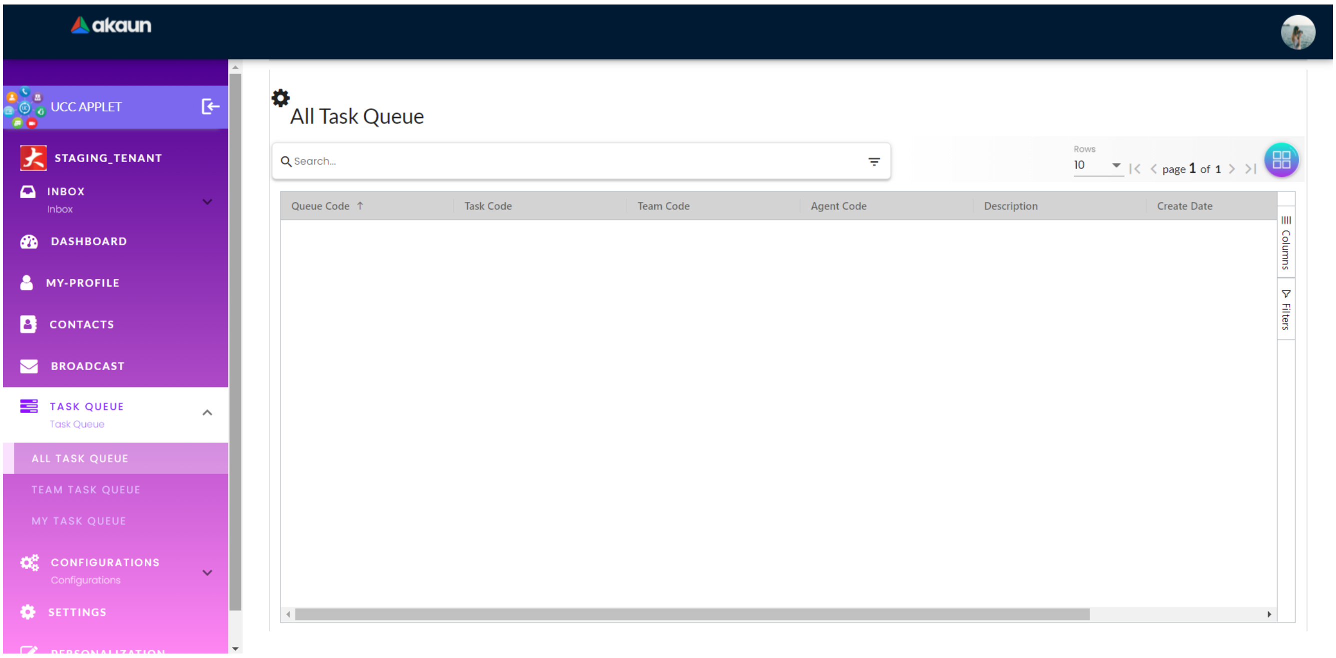
A.20.7. Menu 05 - Broadcast

User can send broadcast messages to all the created contacts in the previous Contacts menu. The broadcast message can be sent to contacts either from contact list page, or from contacts uploaded in a csv file.

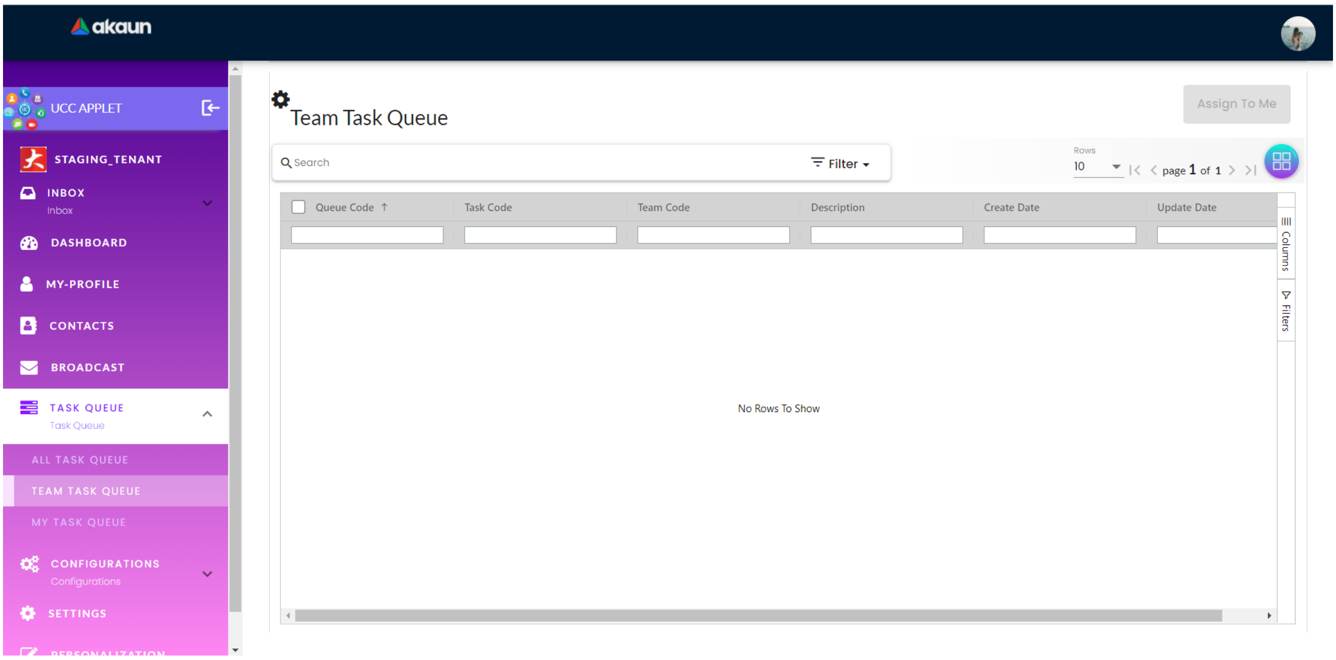


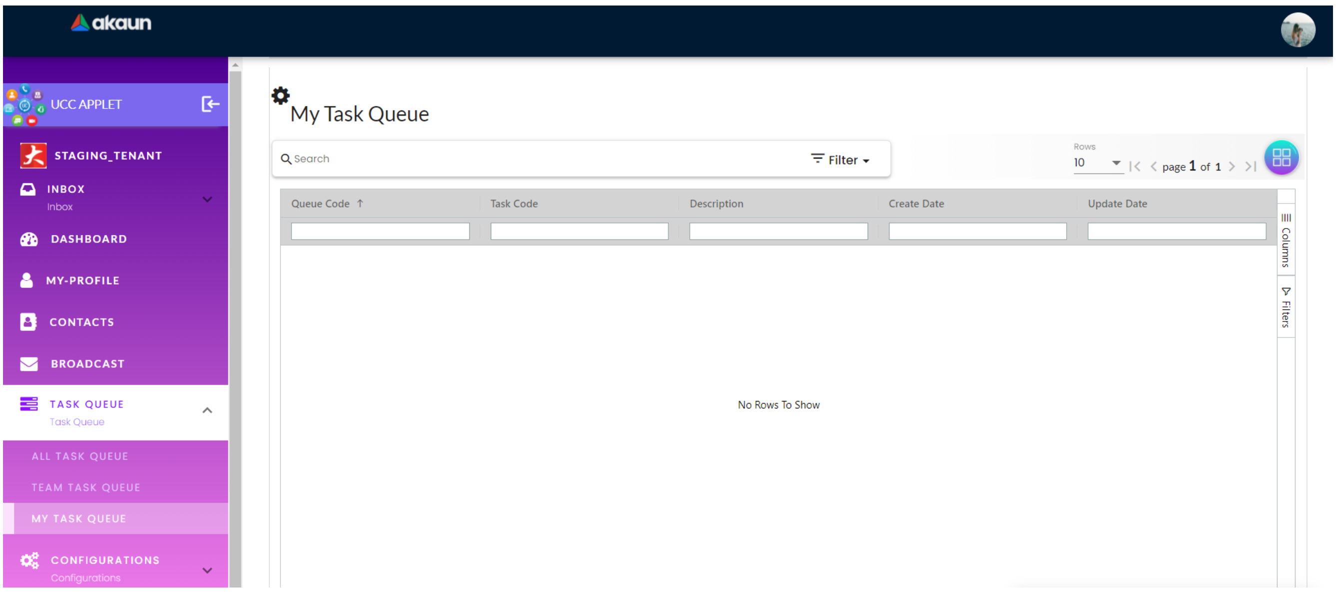
A.20.8. Menu 06 - Task Queue

The task queue is for the active tasks that are waiting in the queue to be assigned to an agent. The agent can see Team task queue and my task queue.



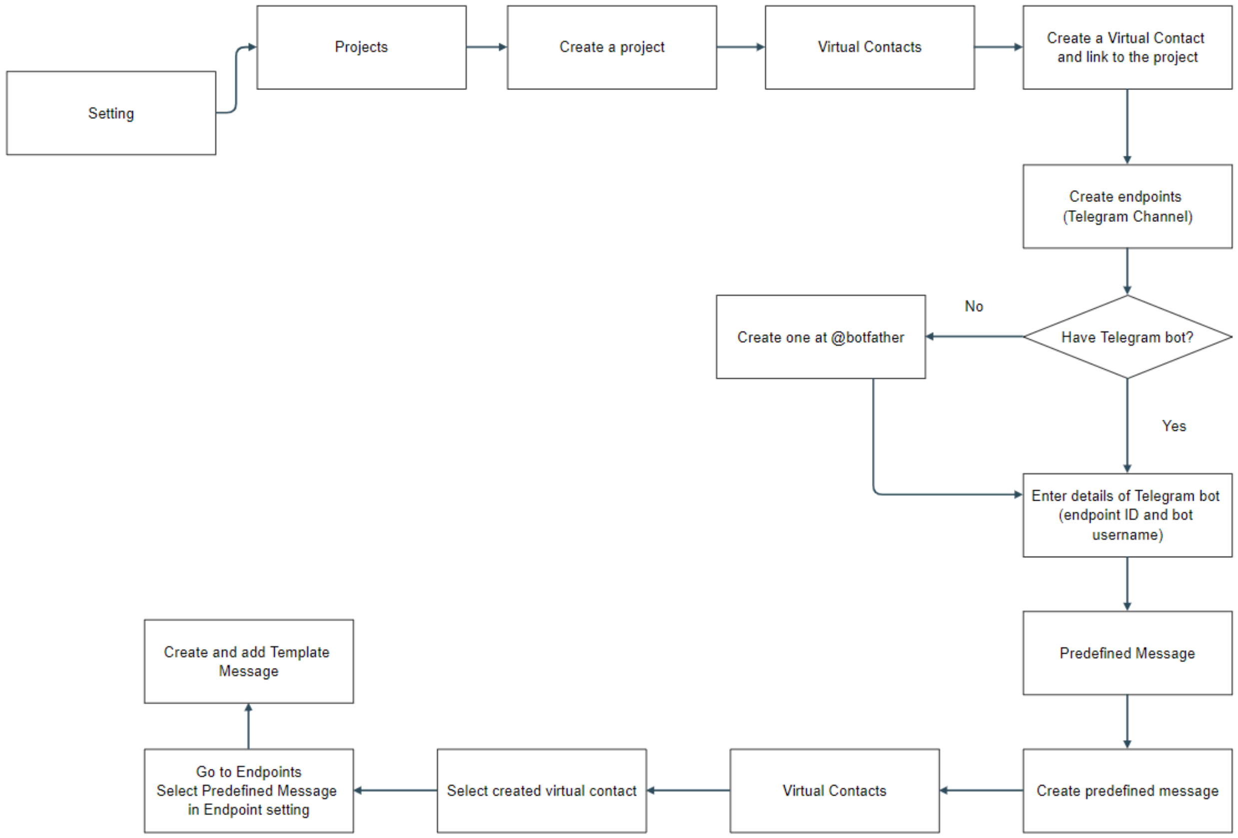
From team task queue, the agent can choose some tasks and click "assign to me".





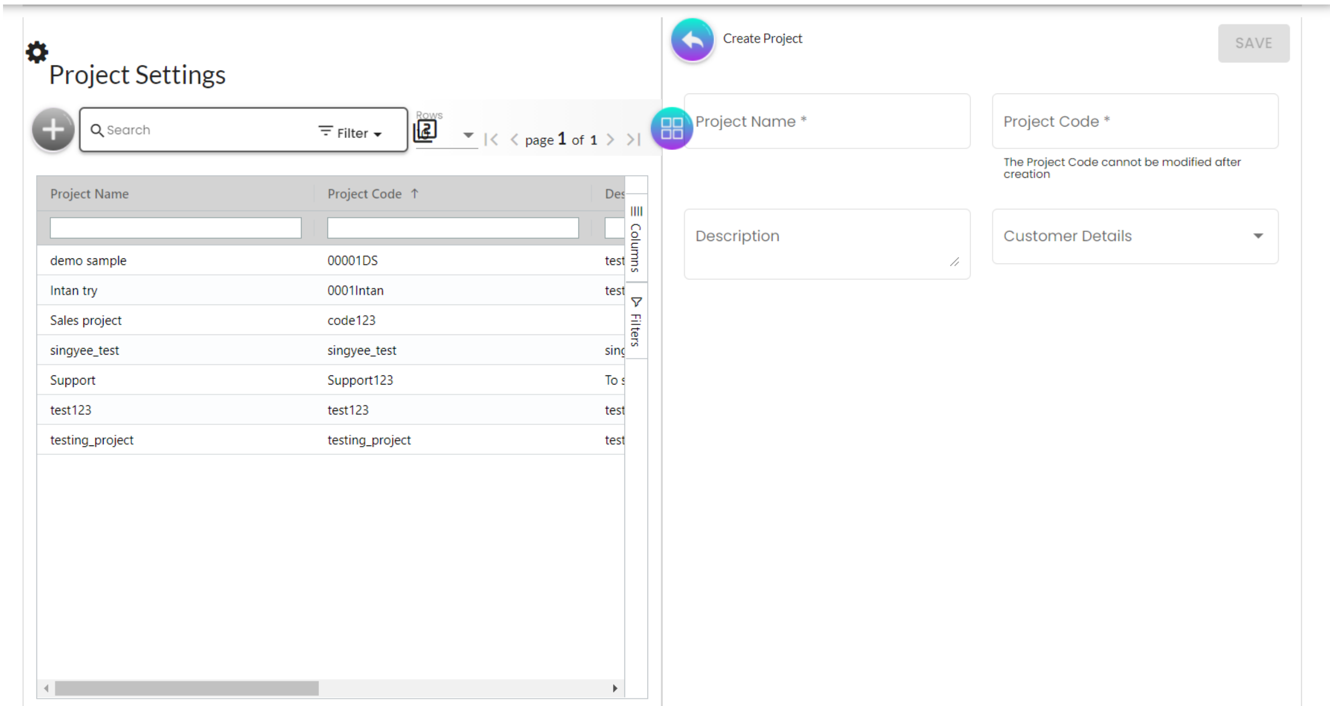
A.20.9. Menu 07 - Configuration

The below workflow shows the progress of how to create projects, virtual contacts, predefined messages and link them all together under Settings. The workflow can be viewed under Moqups.

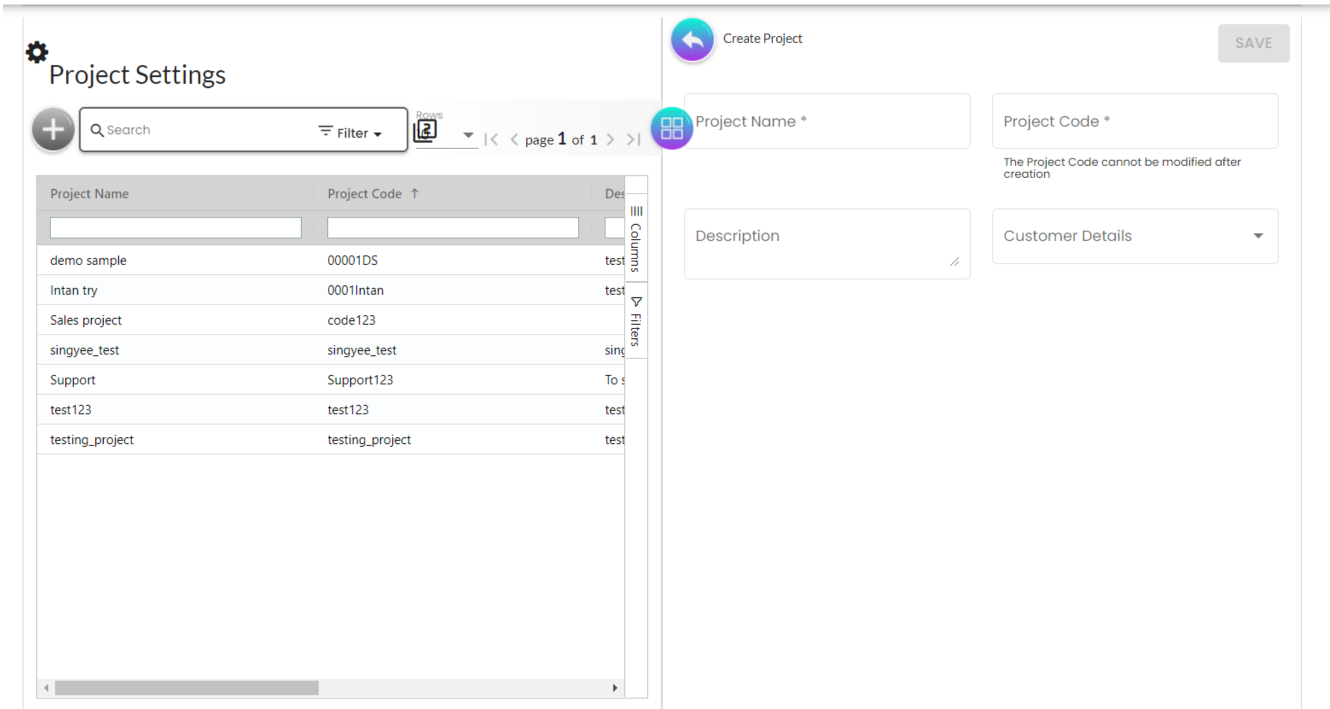


A.20.9.1. Projects

The list of projects will show under this menu (if any).

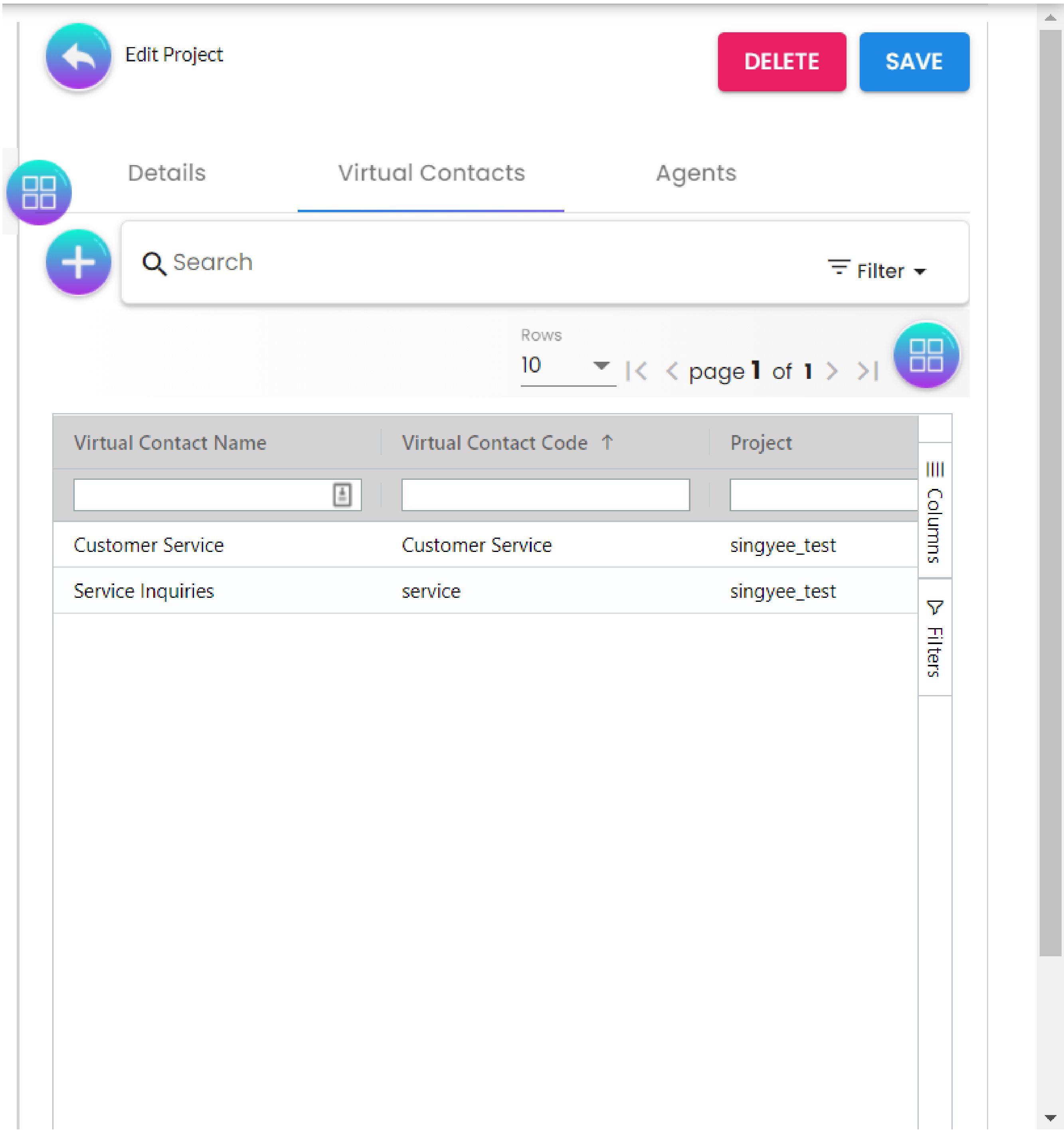


To create a new project, click on the + symbol. User has to provide Project Name, Project Code and Description.



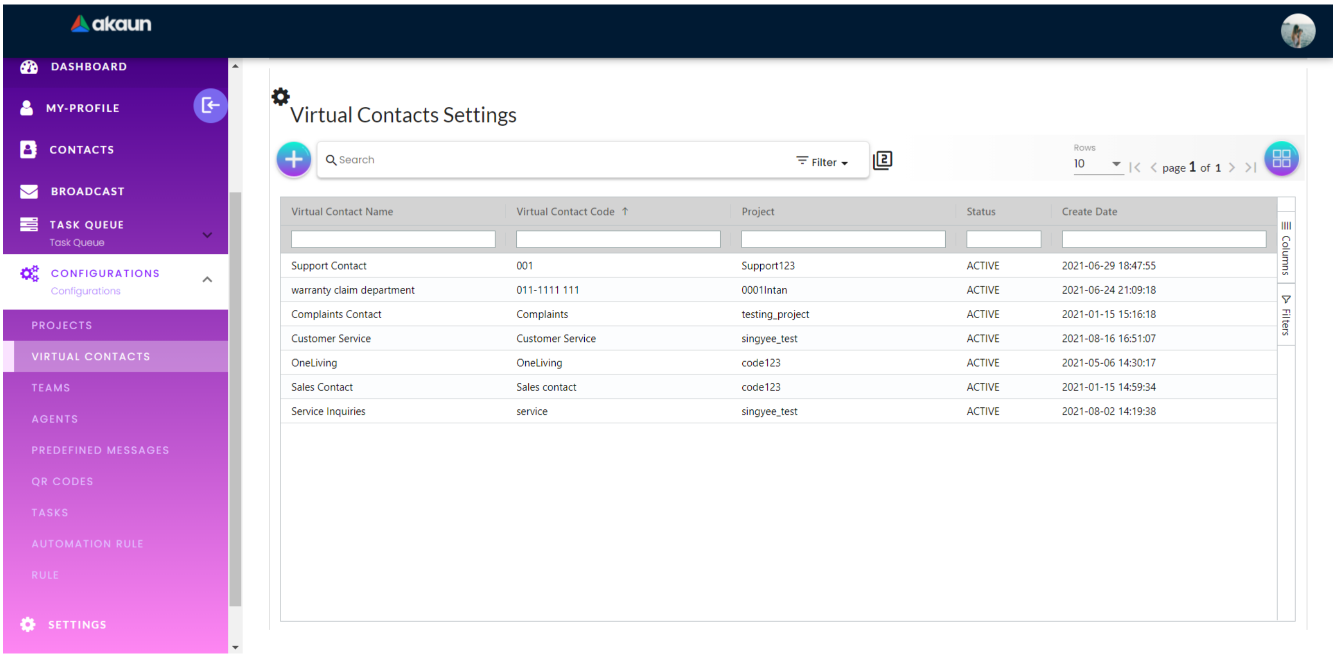
To edit a project, click on the project in the list, go to Virtual Contacts tab and create to add Virtual Contacts to the selected project.

NOTE	You can have a project with multiple virtual contacts



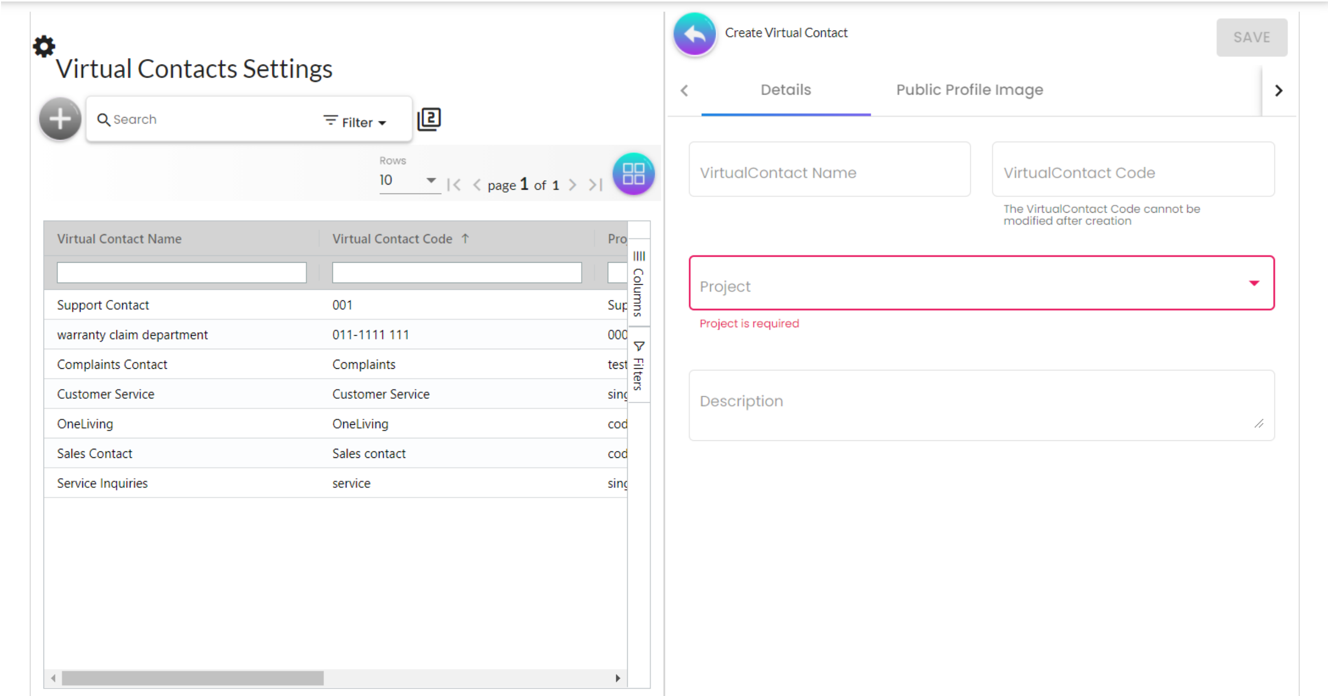
A.20.9.2. Virtual Contacts

The list of virtual contacts will show under this menu (if any).

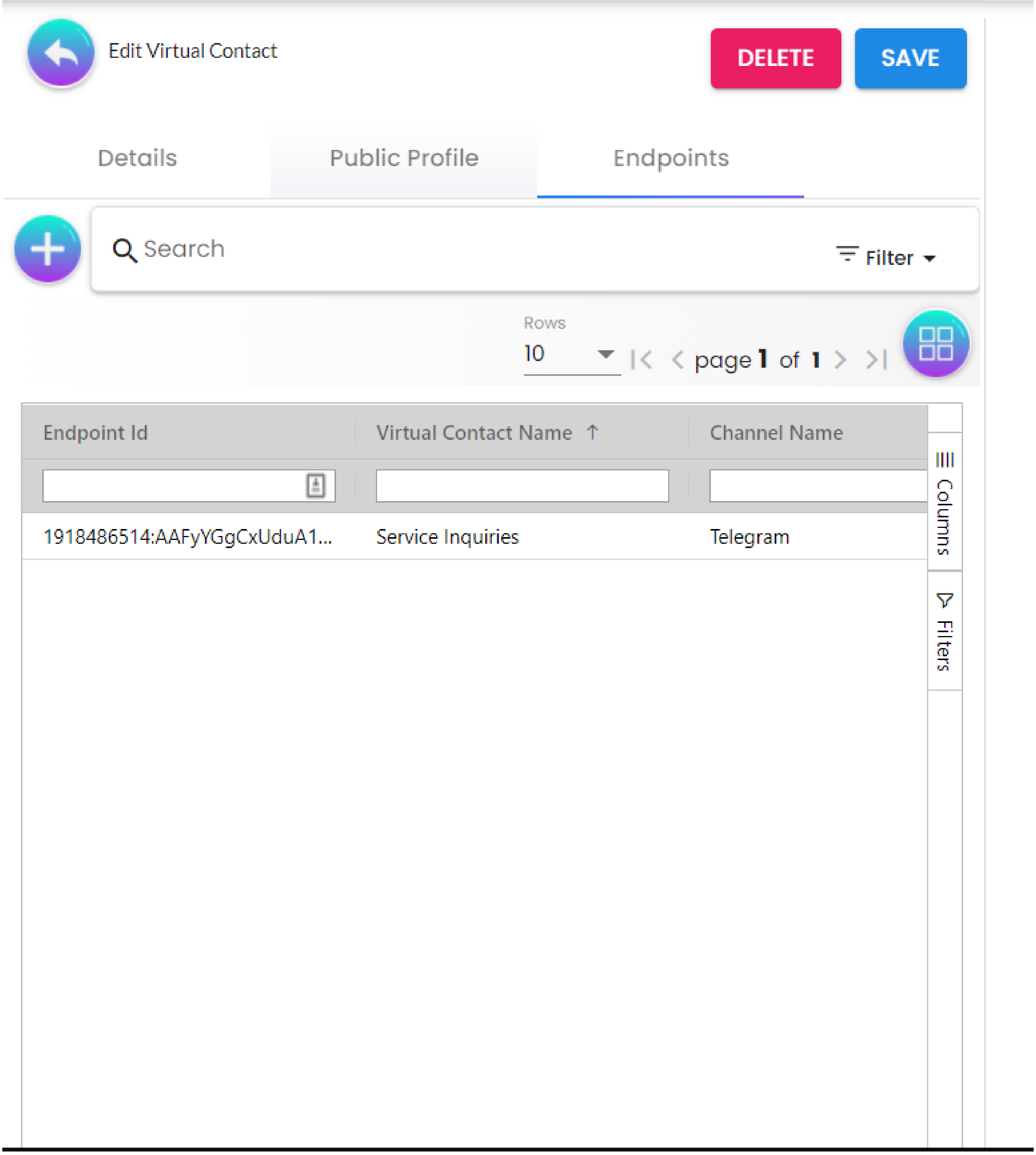


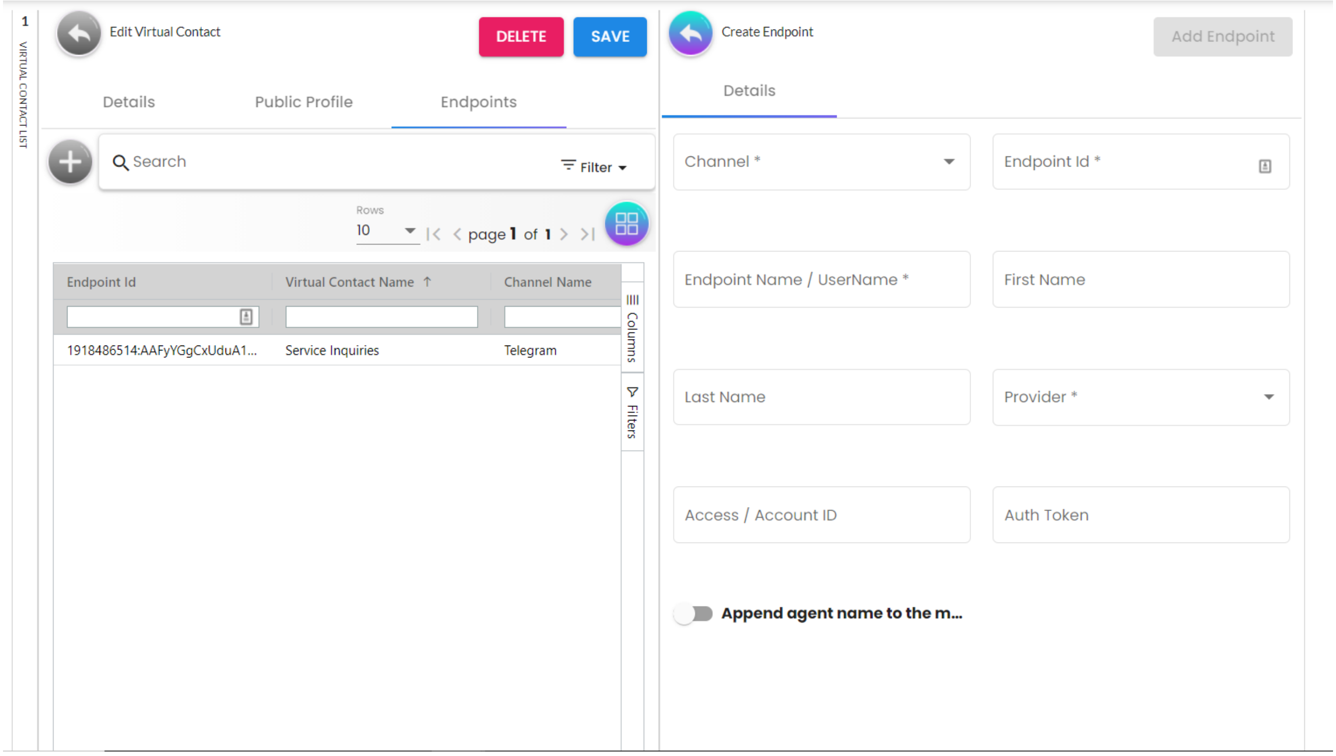
To create a new virtual contact, click on the + symbol, insert virtual contact name and code, link it to Project if any.

NOTE Each virtual contact can only be linked to a single project



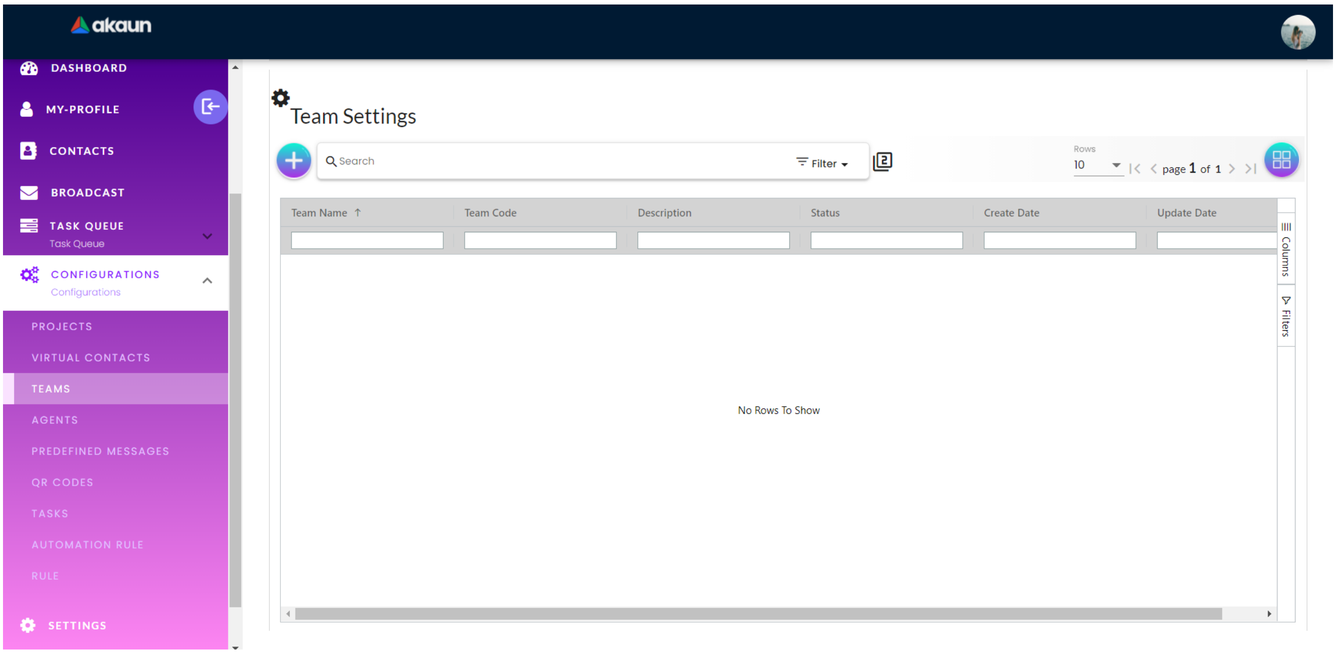
To edit a virtual contact, select it on the list. User can create endpoints for the respective virtual contacts by clicking the + symbol.


Edit Virtual Contact
DELETE
SAVE
Details
Public Profile
Endpoints
Search
Filter
Rows
10
page 1 of 1
Endpoint Id
Virtual Contact Name
Channel Name
1918486514:AAFyYGgCxUduA1...
Service Inquiries
Telegram
Columns
Filters

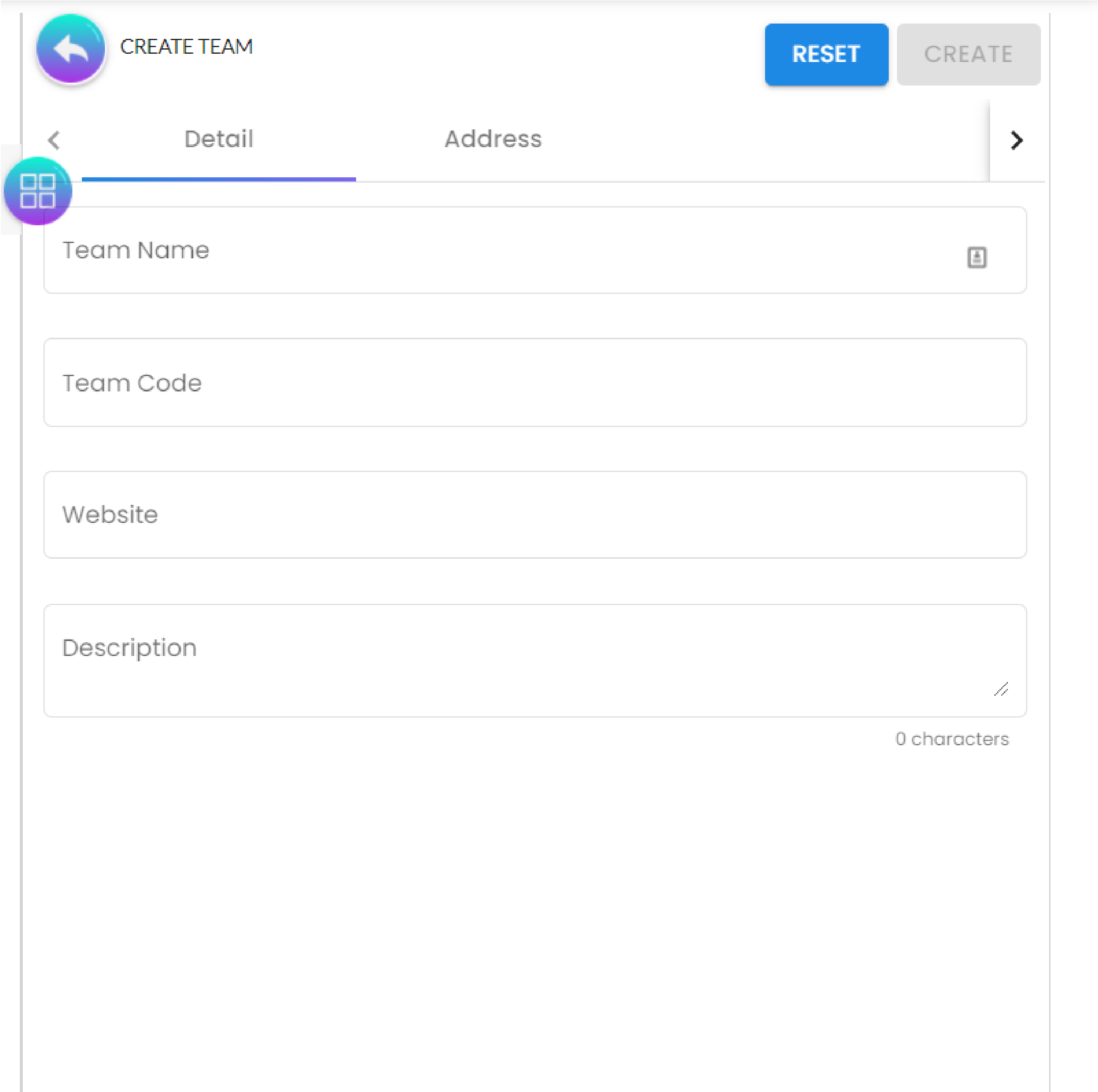


A.20.9.3. Teams

The list of teams will show under this menu (if any).

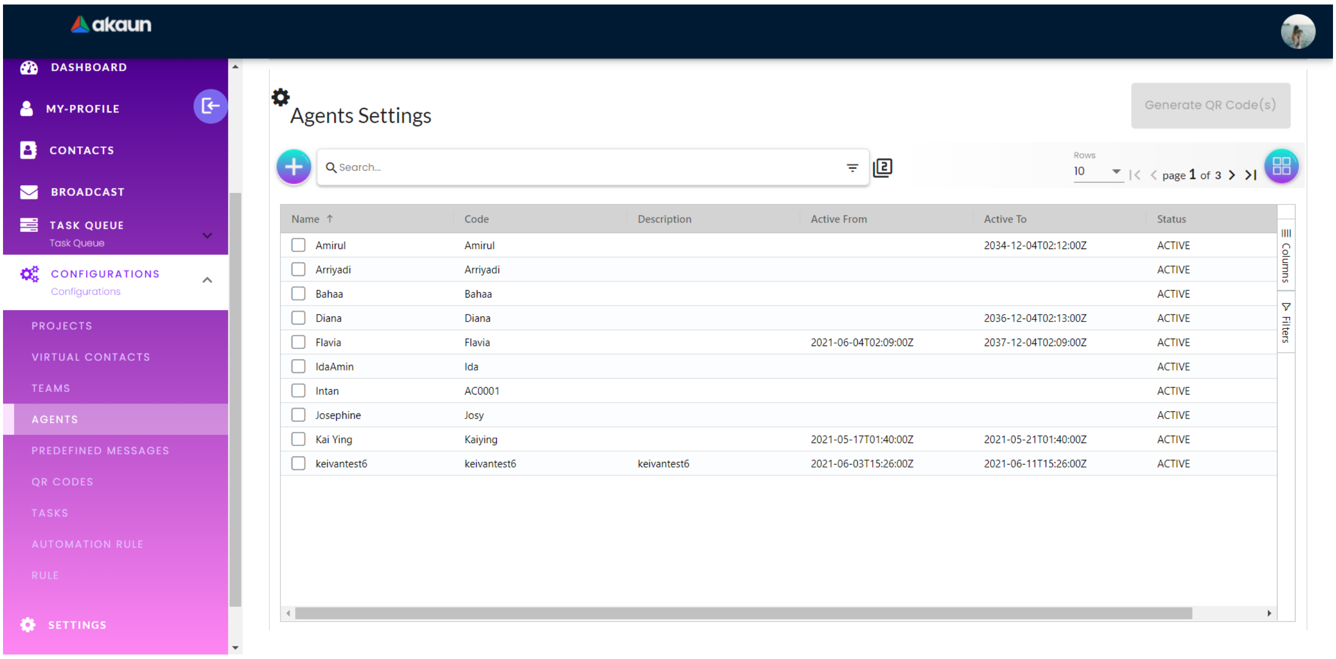


To create a team, click on the + symbol. User has to provide Team Name, Team Code and Address. Website and Description are optional information.

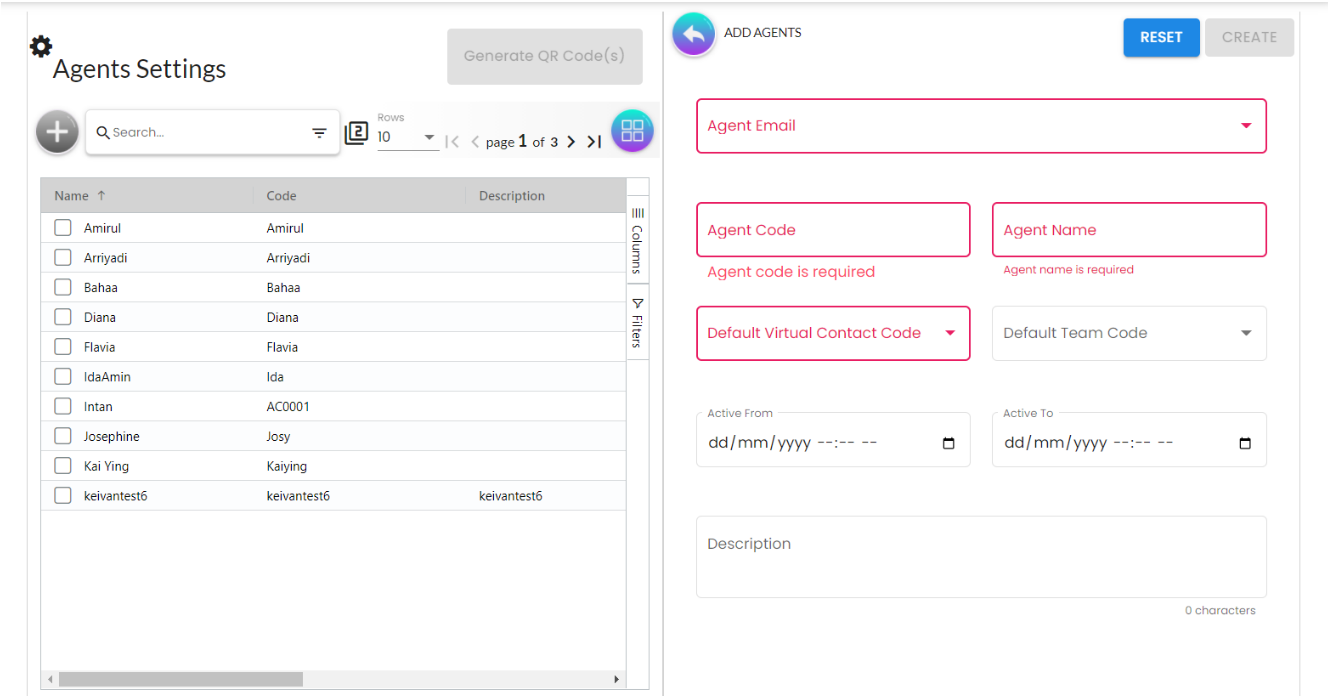


A.20.9.4. Agents

The list of agents will show under this menu (if any).

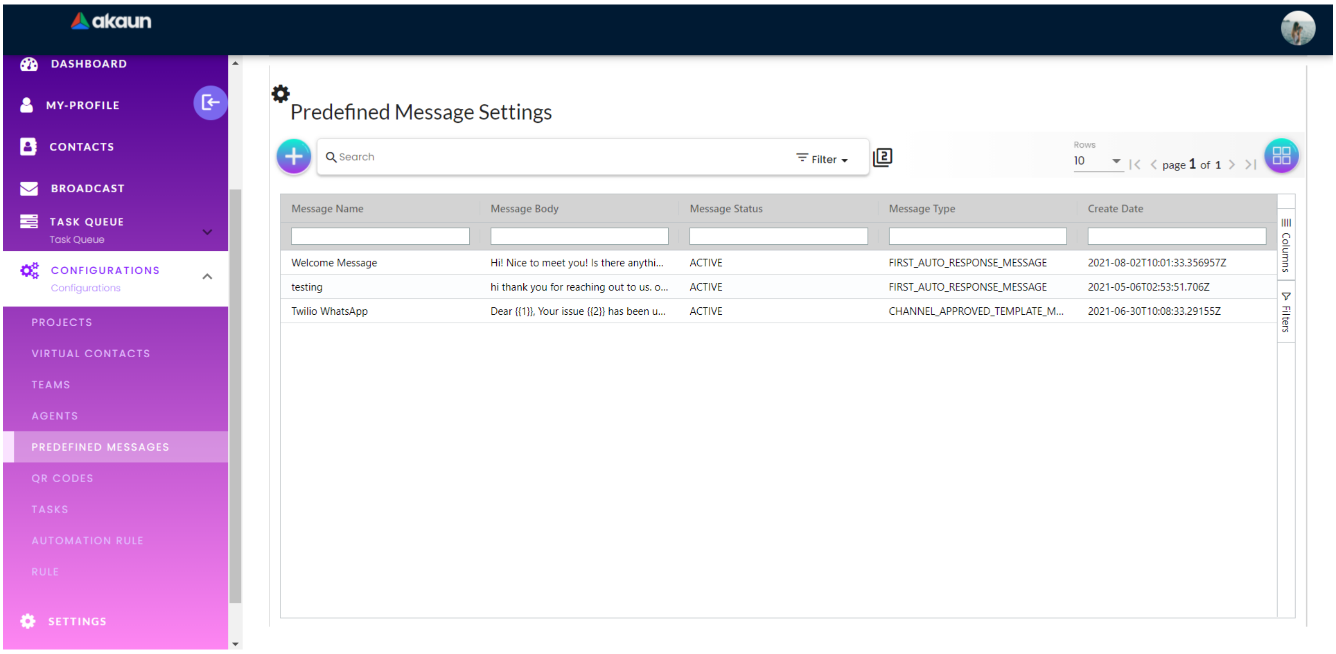


User can add agents by clicking + symbol and provide the required details as below.

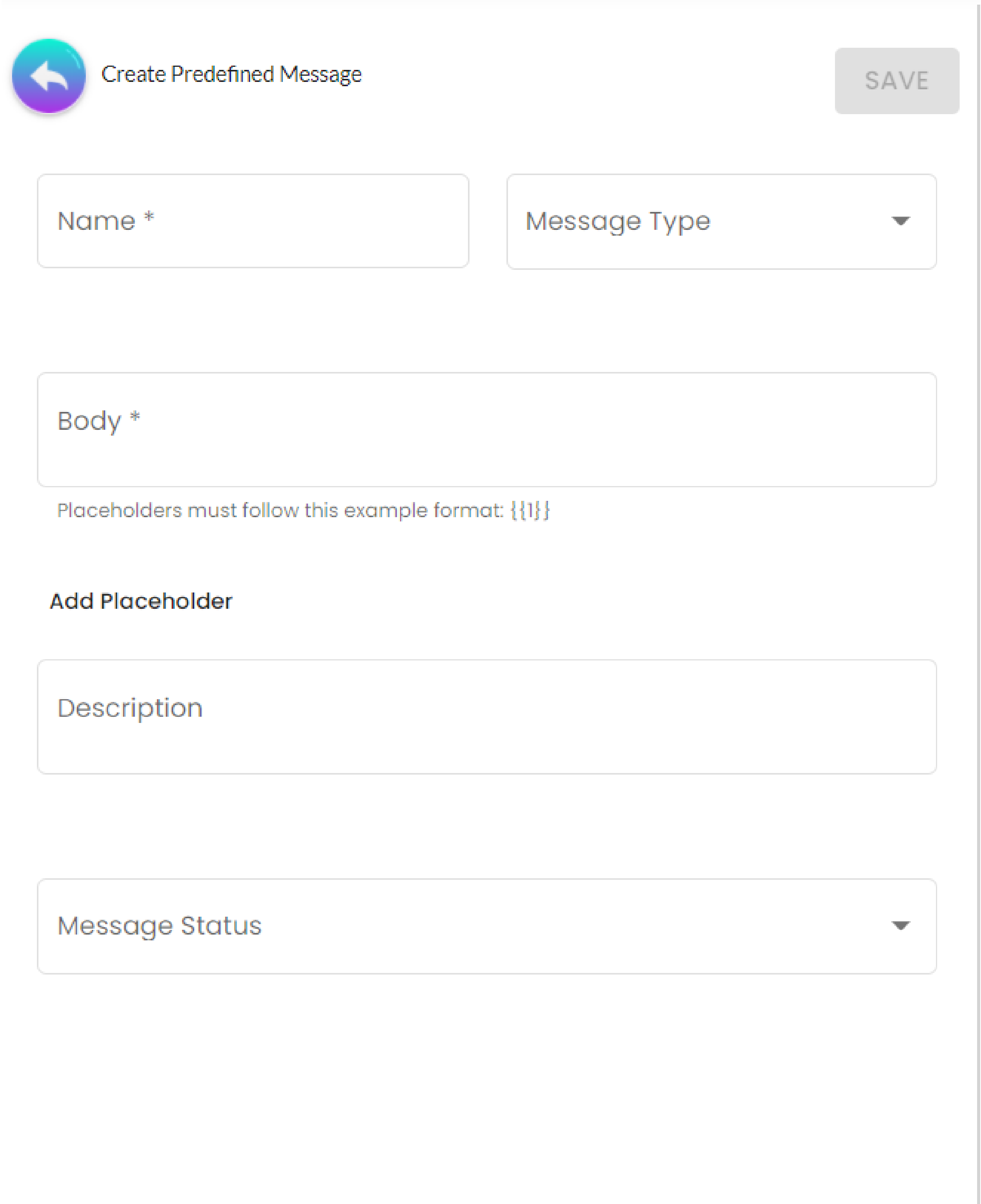


A.20.9.5. Predefined Messages

The list of agents will show under this menu (if any).

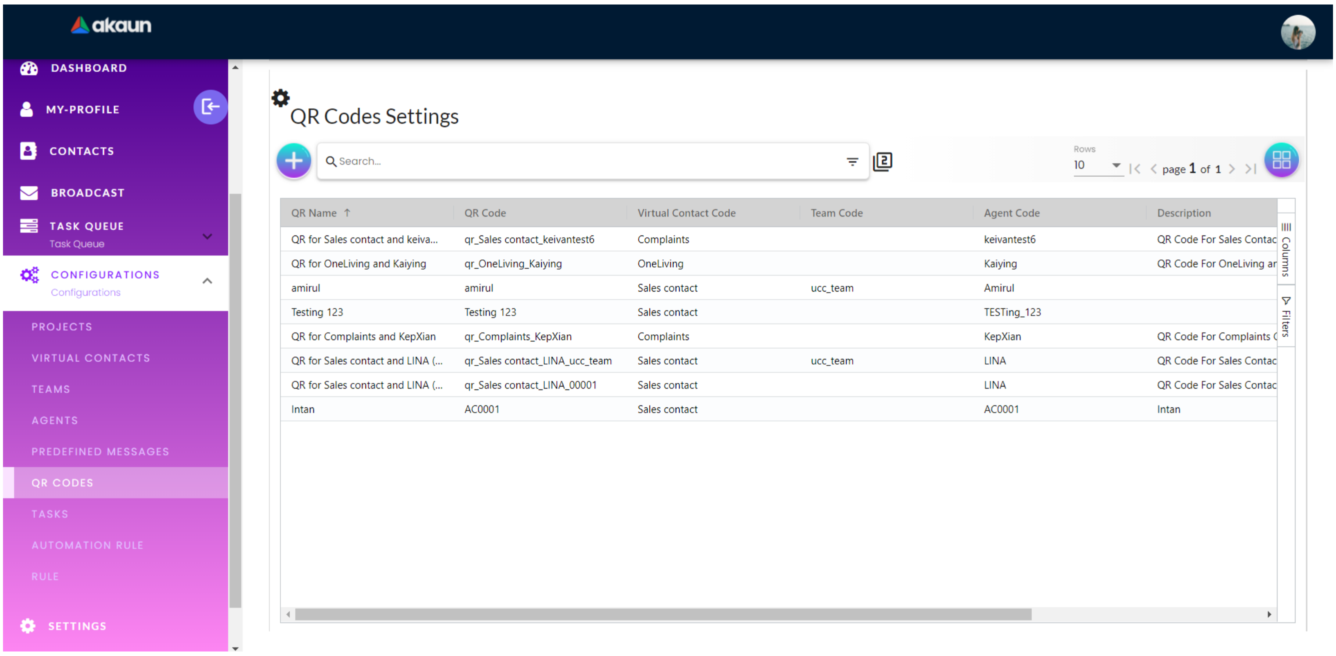


By clicking the + symbol, user can create new predefined message, and insert message name, type and body. User can add predefined messages into virtual contacts under Virtual Contacts > Endpoints > Predefined Message.

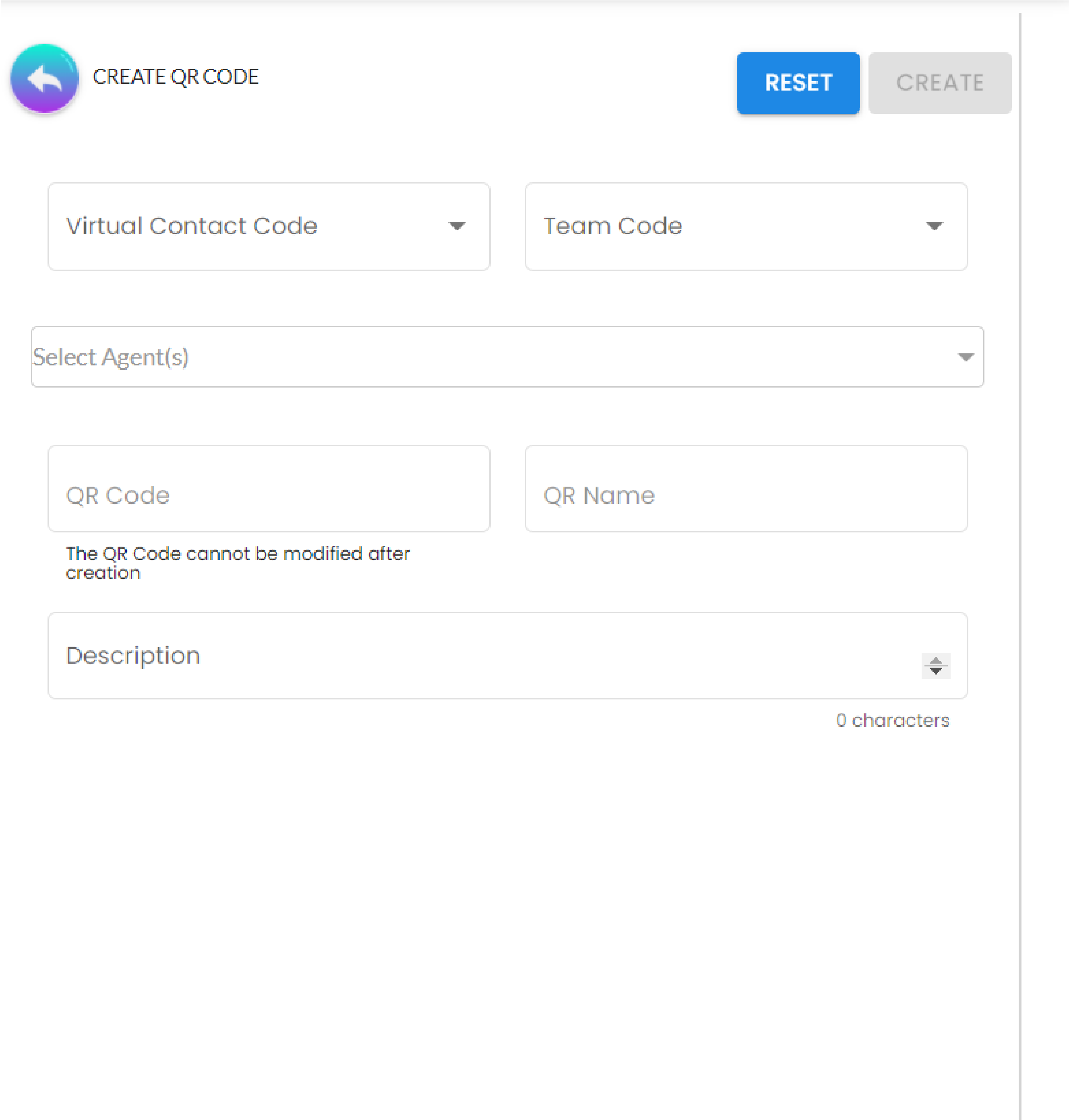


A.20.9.6. QR Codes

The list of QR codes will show under this menu (if any).

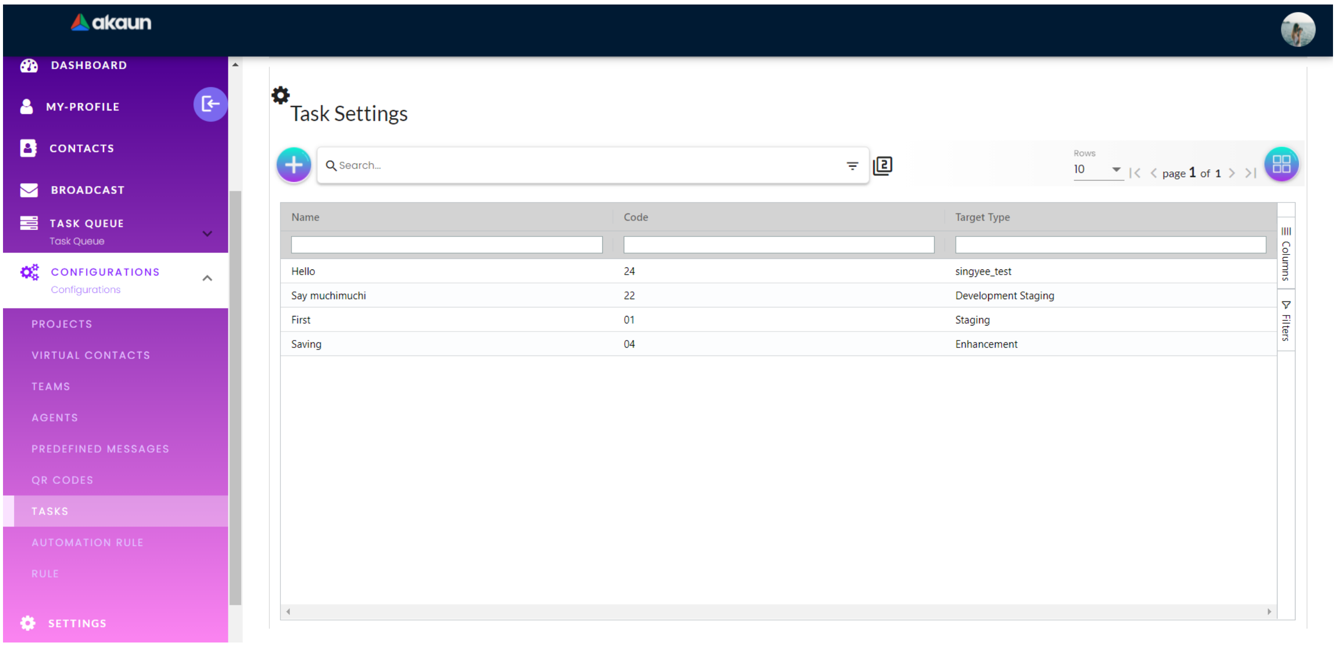


By clicking the + symbol, user can create QR code to the specific virtual contact, team and agent.

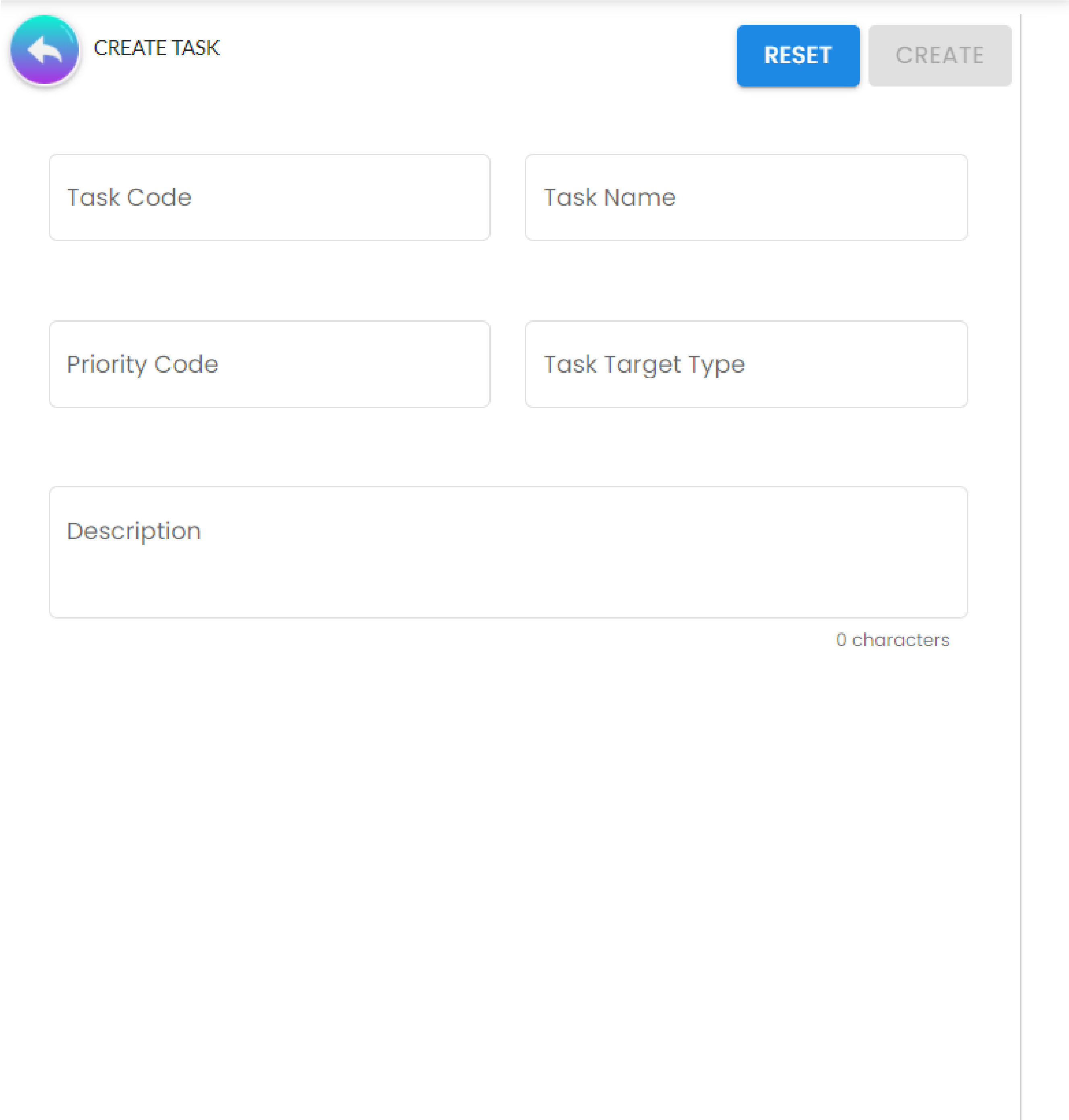


A.20.9.7. Tasks

The list of task will show under this menu (if any).

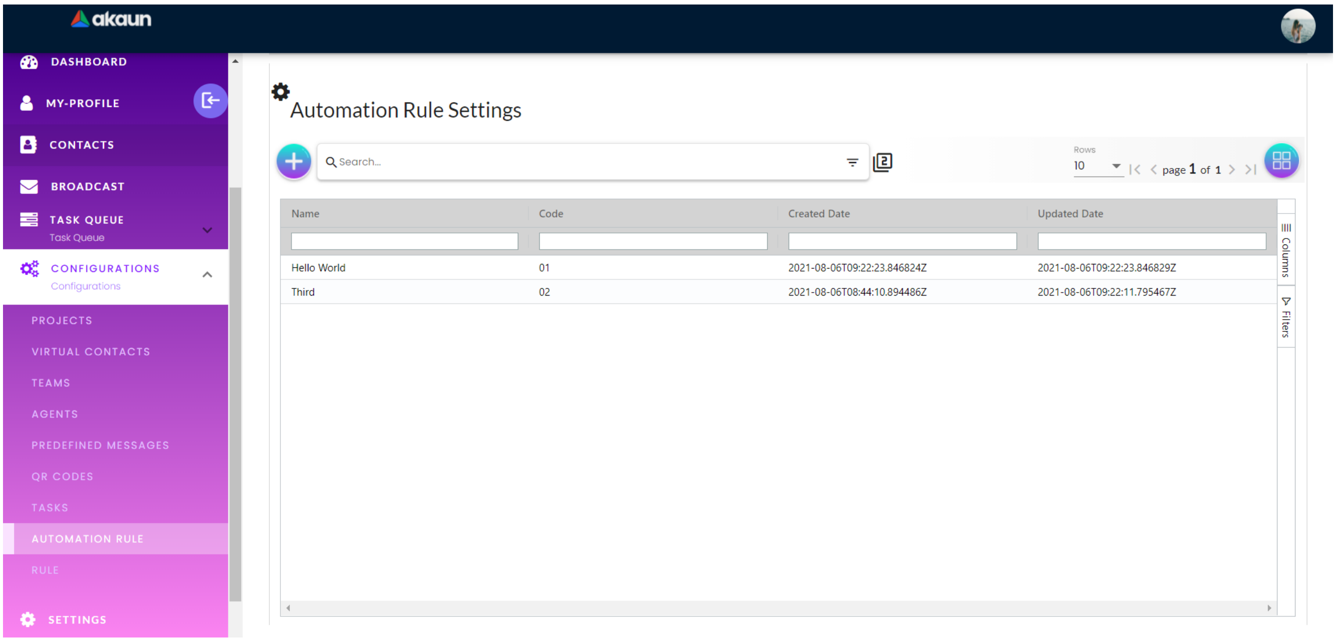


By clicking the + symbol, user can create new task. Task code, name, priority code and task target type are required information when creating task.

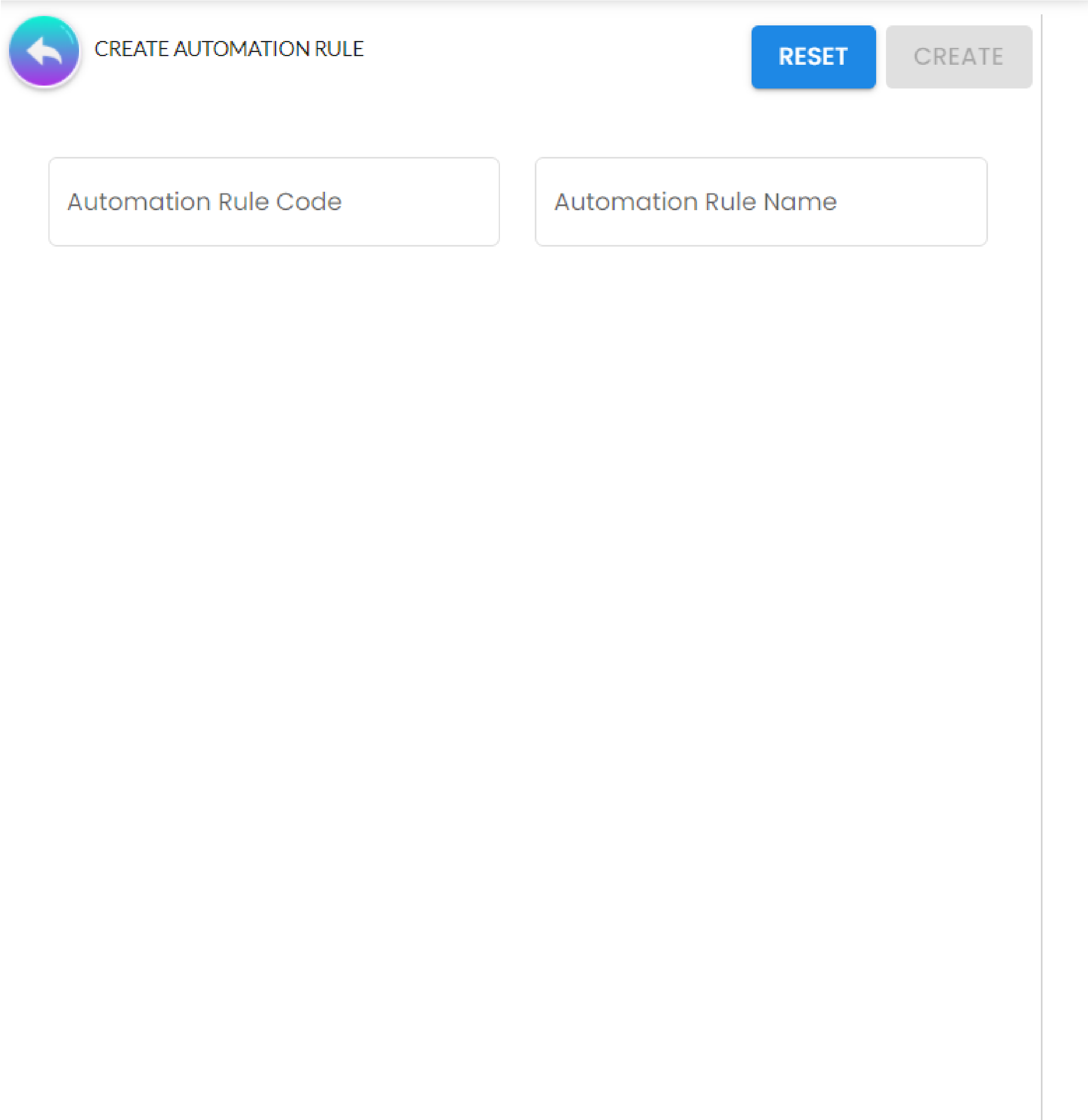


A.20.9.8. Automation Rule

The list of automation rule will show under this menu (if any).

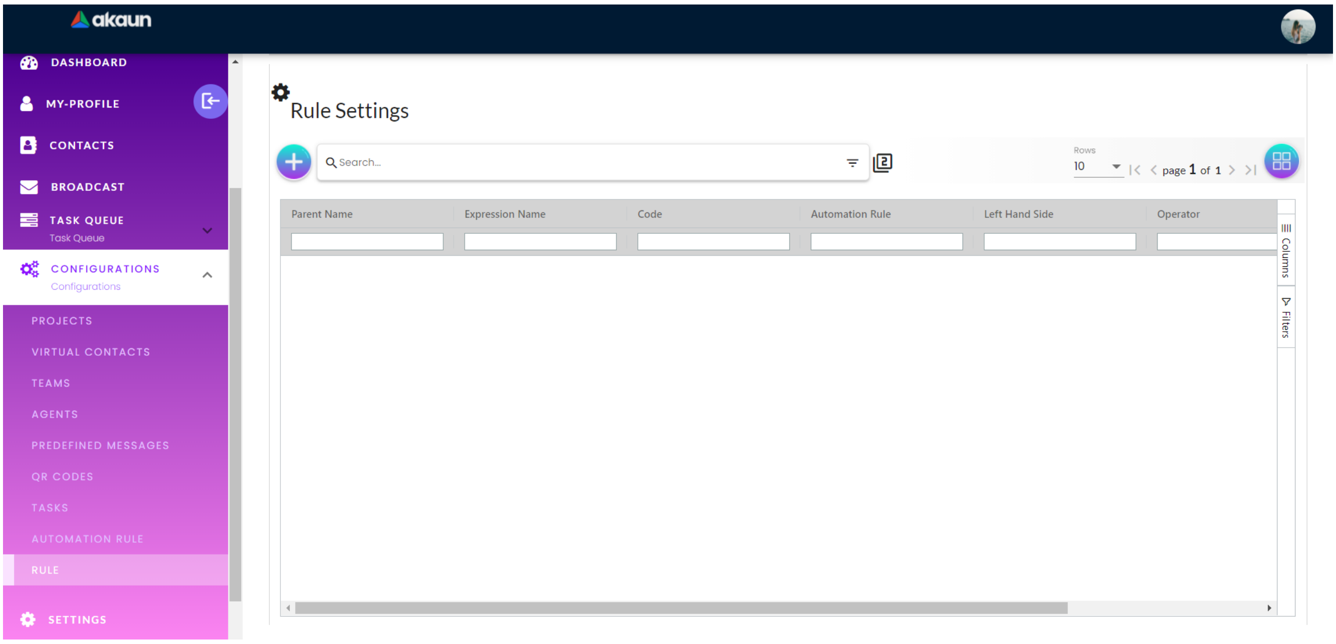


By clicking the + symbol, a user can create new automation rule.



A.20.9.9. Rule

The list of rule will show under this menu (if any).

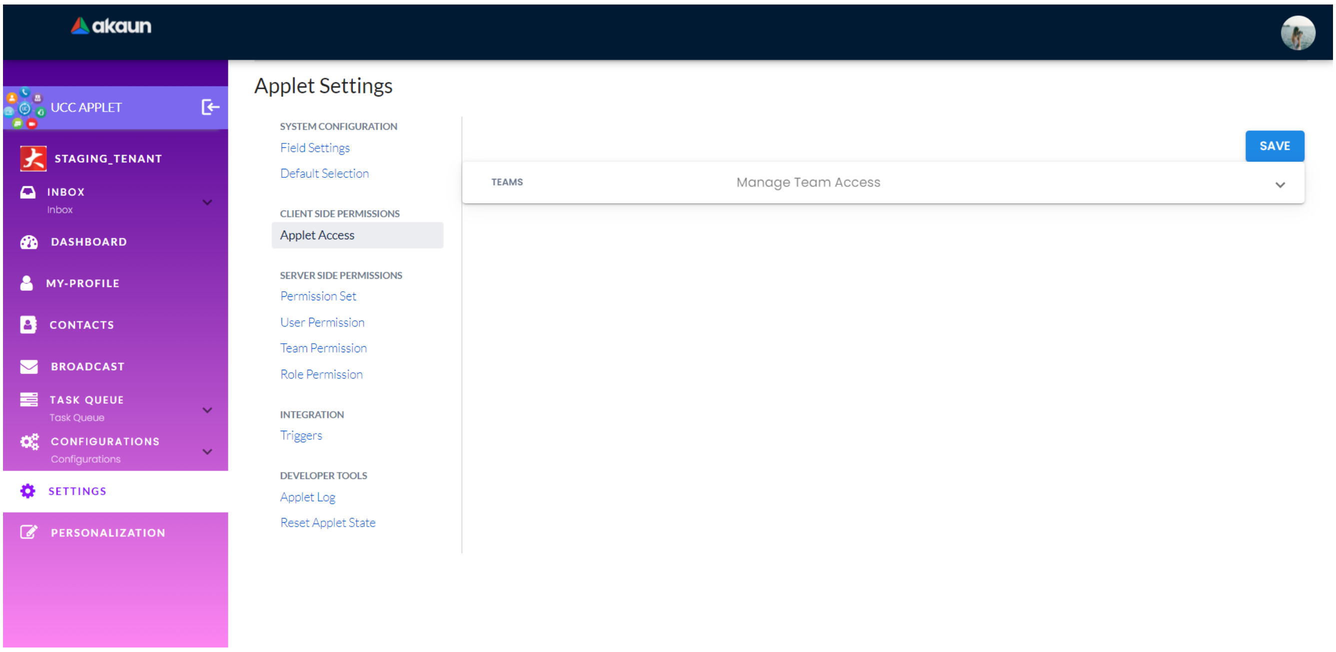


NOTE The functionality is still under development.

A.20.10. Menu 08 - Settings

A user can change the applet settings in Settings. There are several types of settings/permissions, namely:

- System Configuration
  - Field Settings
  - Lines Settings
  - Department Settings
  - Default Selection
- Client Side Permissions
  - Applet Access
- Server Side Permissions
  - Permission Set
  - User Permission
  - Team Permission
  - Role Permissions
- Integration
  - Triggers
- Developer Tools
  - Applet Log
  - Reset Applet State

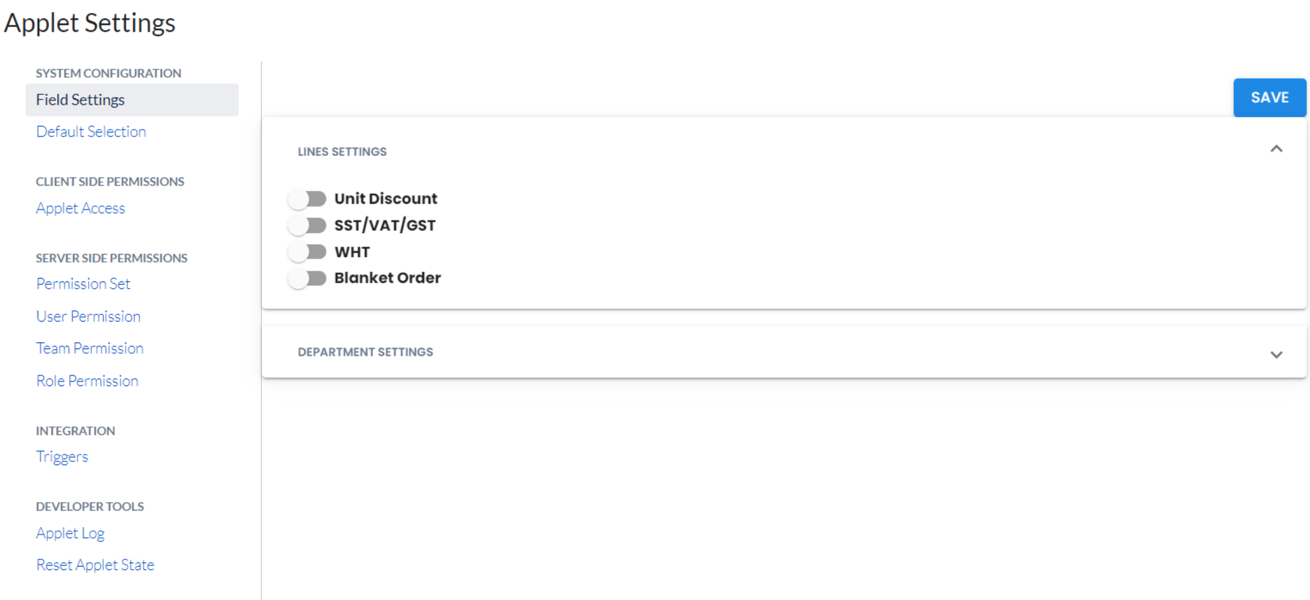


A.20.10.1. System Configuration

Field Settings

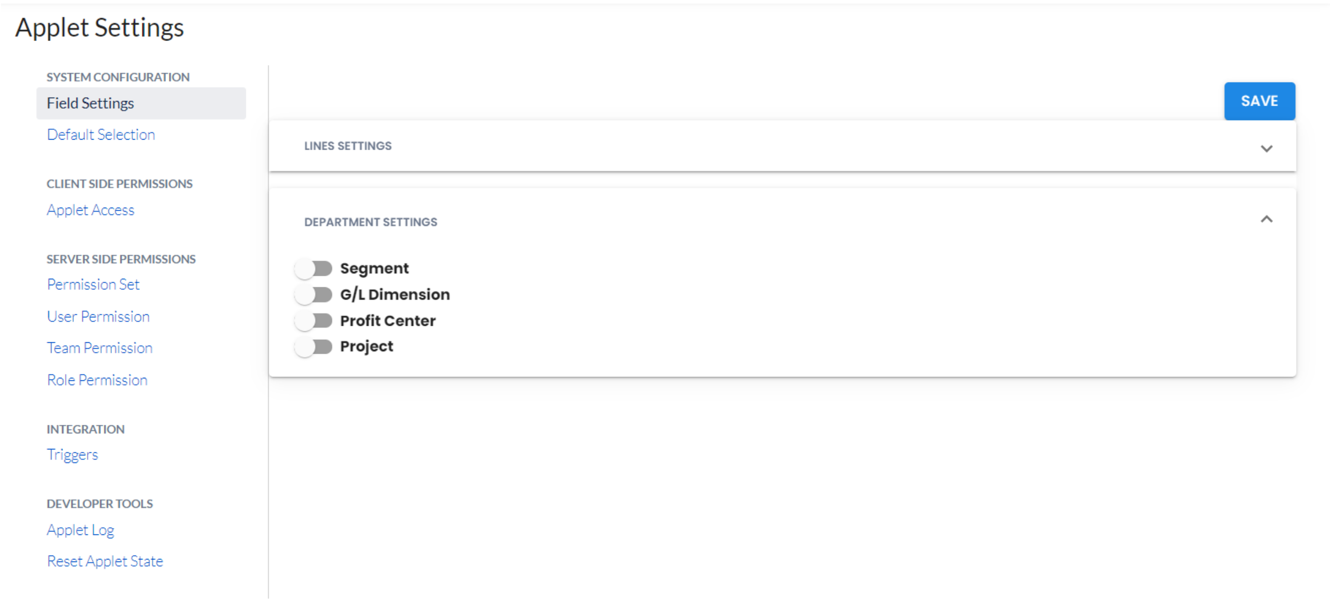
Lines Settings

There are 4 settings under Lines Settings, namely: Unit Discount, SST/VAT/GST, WHT and Blanket Order.



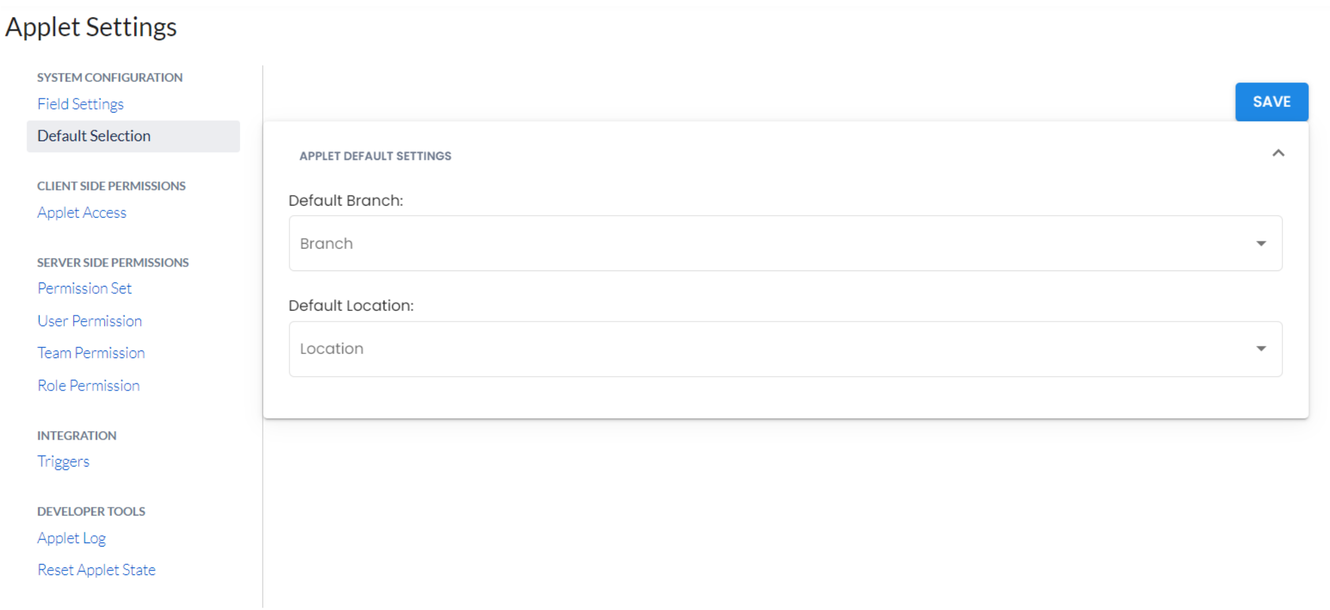
Department Settings

There are 4 settings under Department Settings, namely: Segment, G/L Dimension, Profit Center and Project.



Default Selection

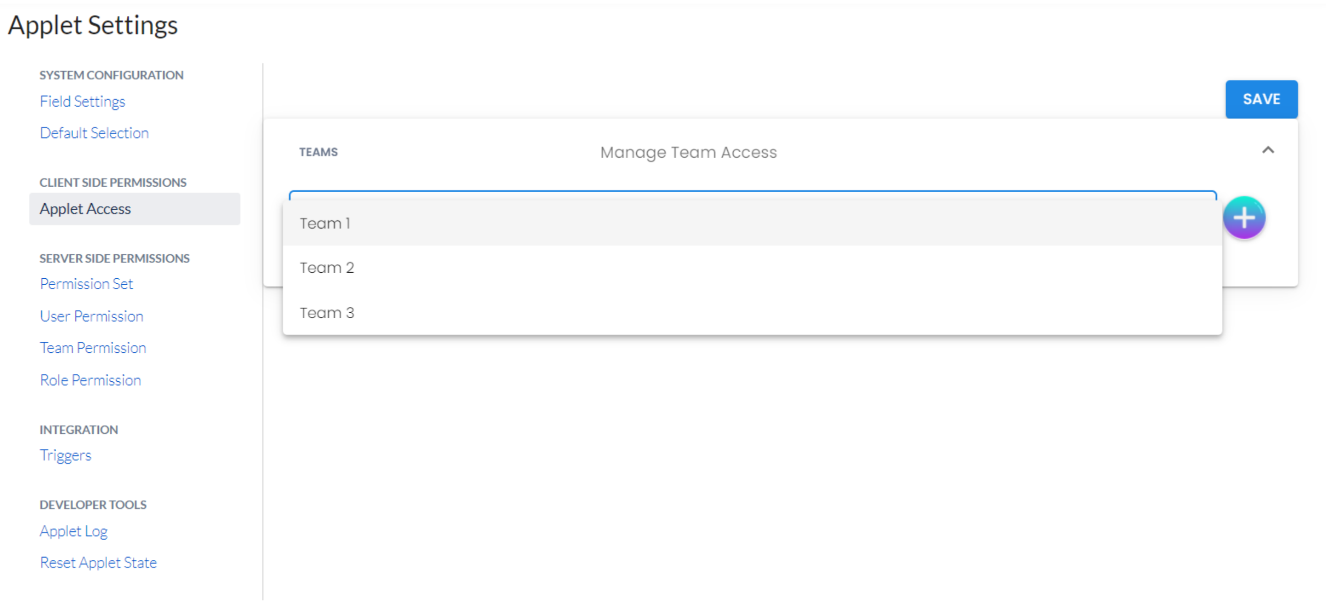
To change Applet Default Settings, user has to key in branch code/name and location code/name.



A.20.10.2. Client Side Permissions

Applet Access

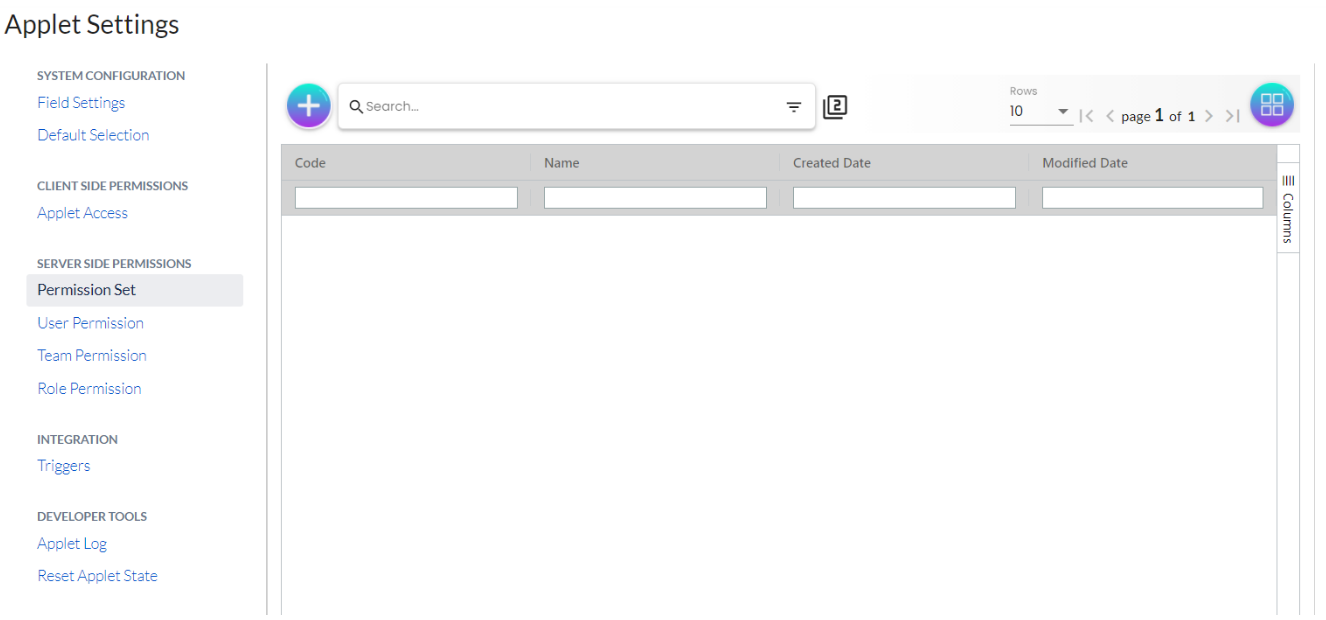
A user can manage their team access under this menu.



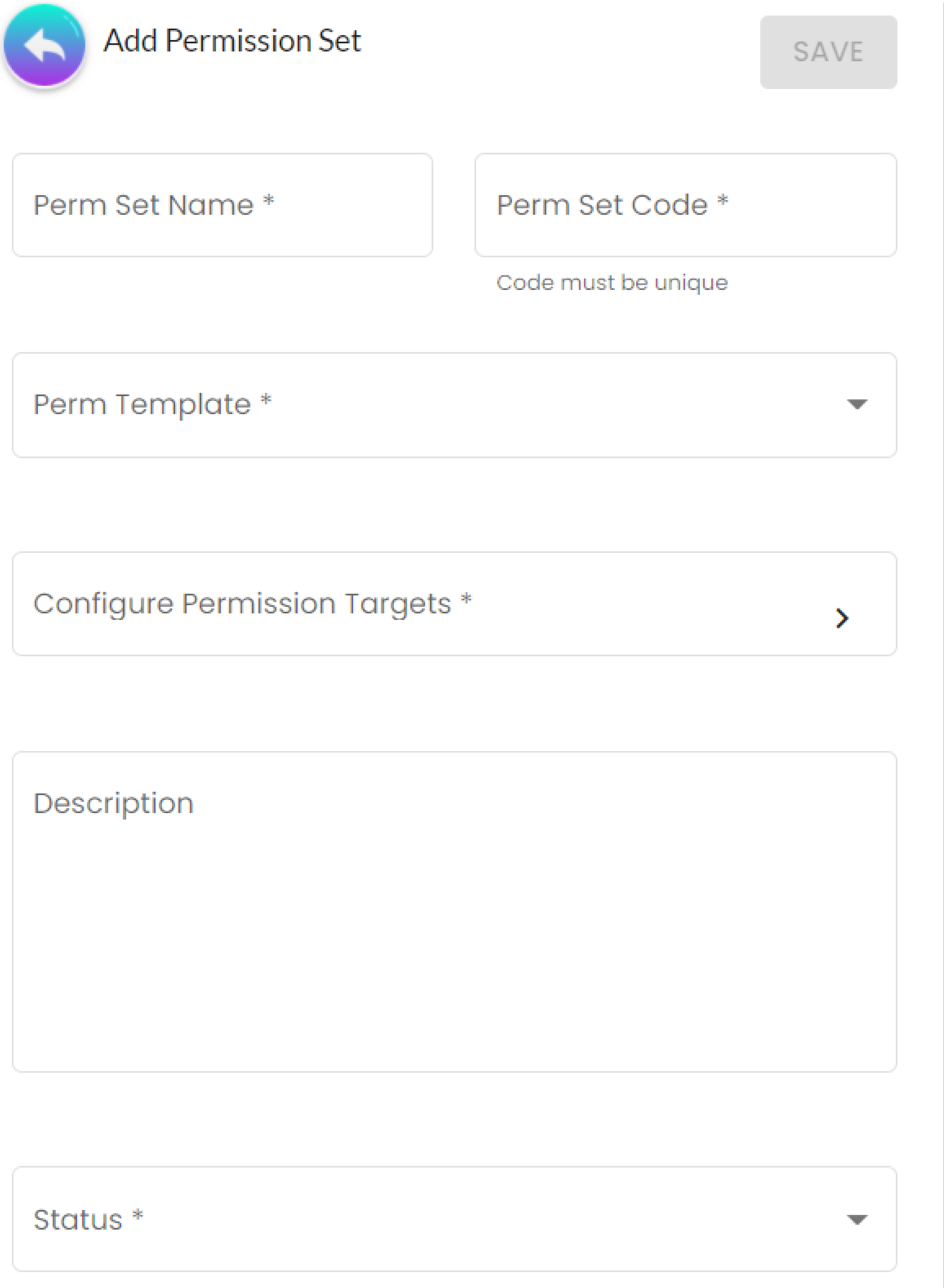
A.20.10.3. Server Side Permissions

Permission Set

The list of permission sets will show under this menu (if any).

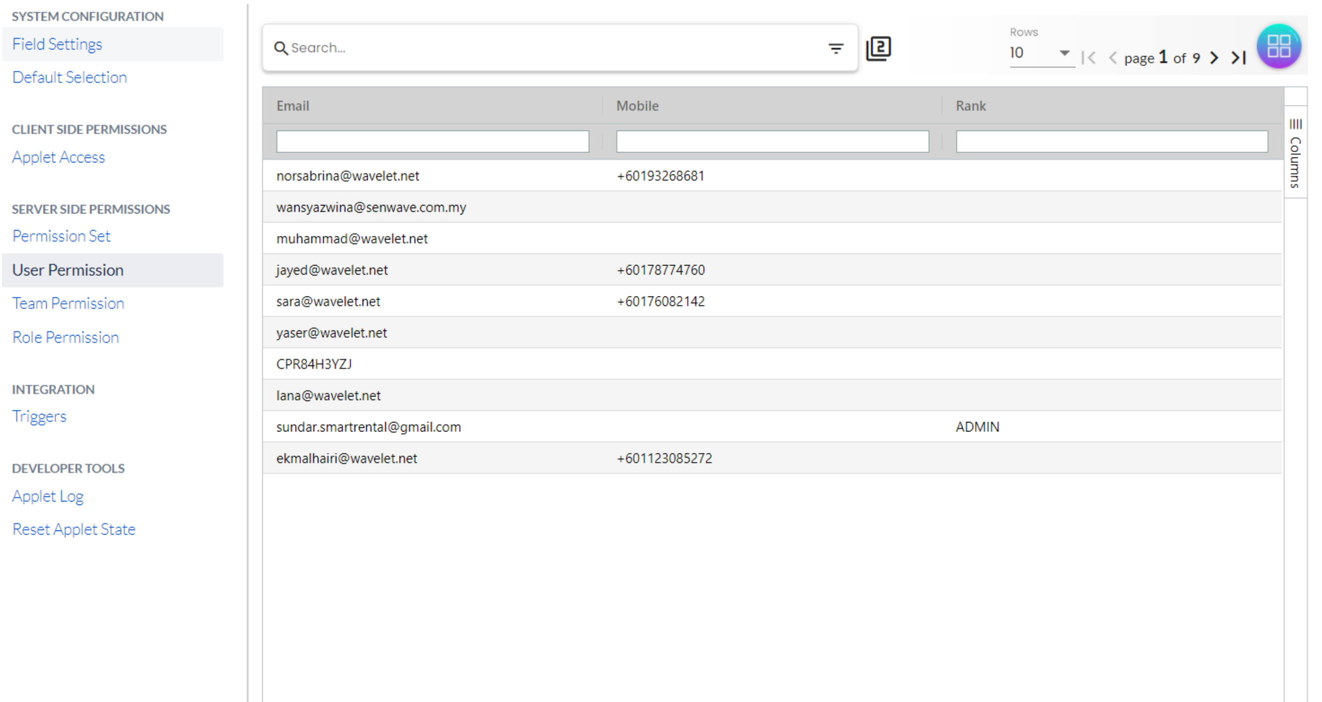


User can add new permission set by providing permission set name, code, template and configure permission targets and status.



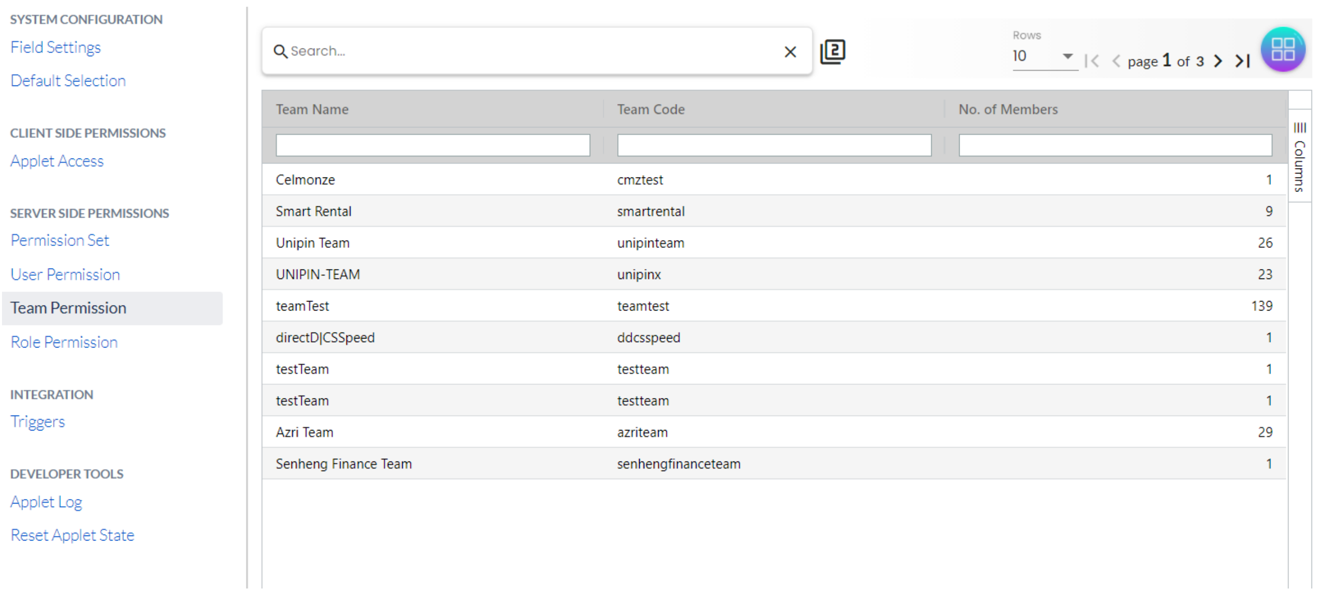
User Permission

The list of user permission will show under this menu (if any).



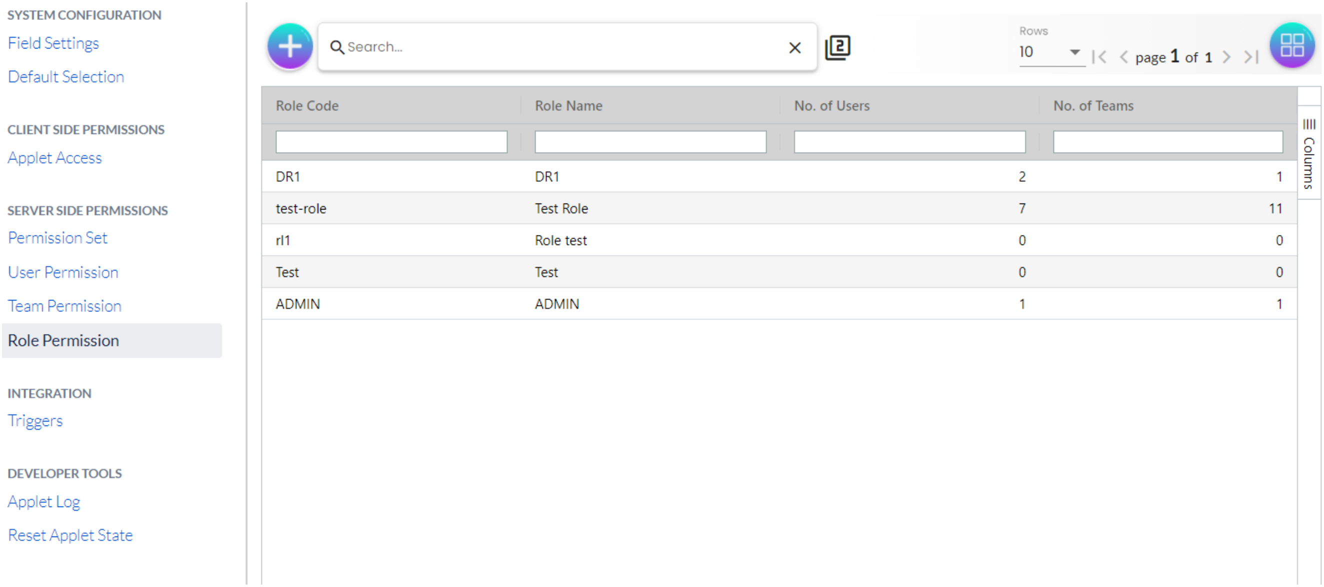
Team Permission

The list of team permission will show under this menu (if any).

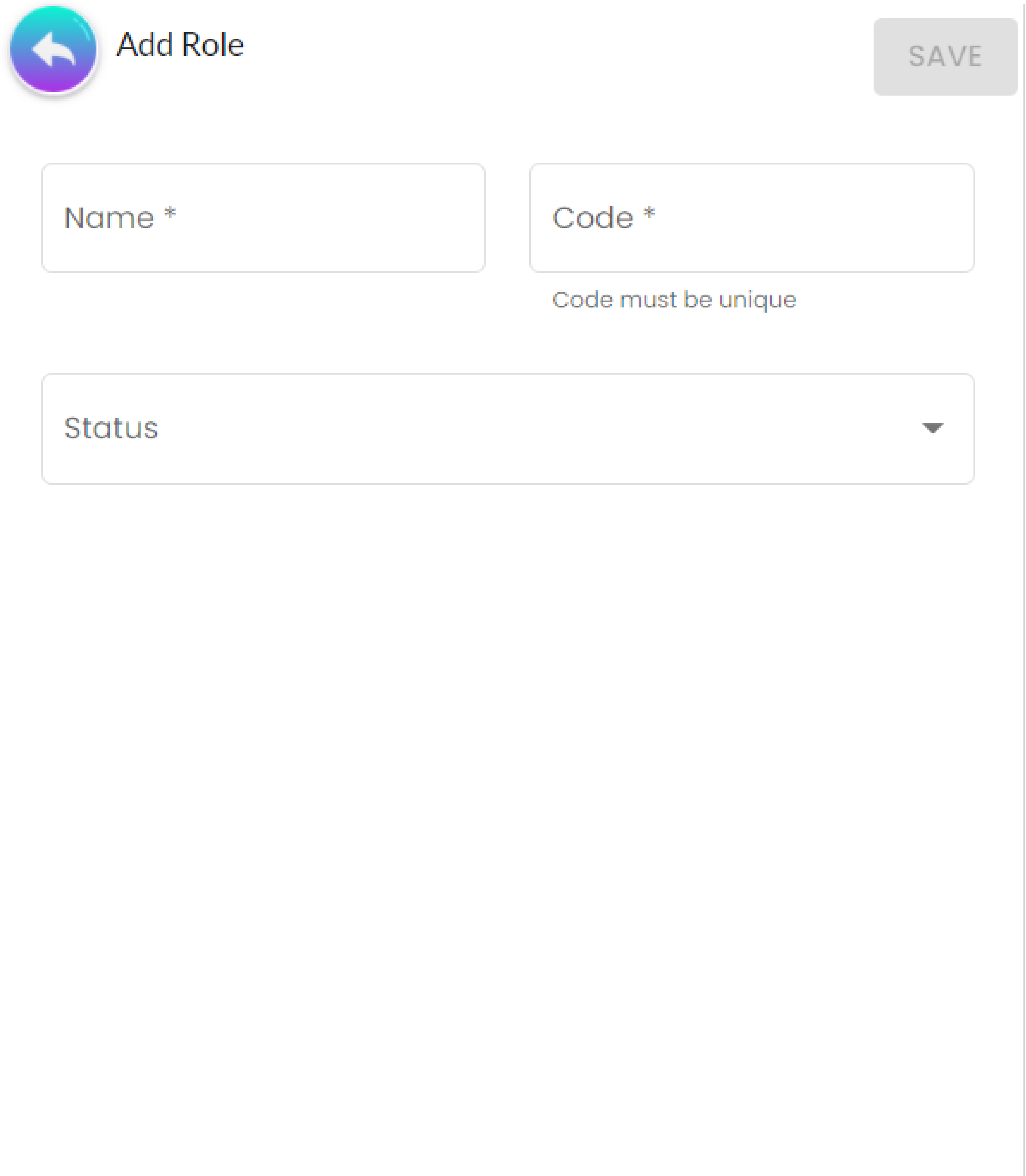


Role Permission

The list of role permission will show under this menu (if any).



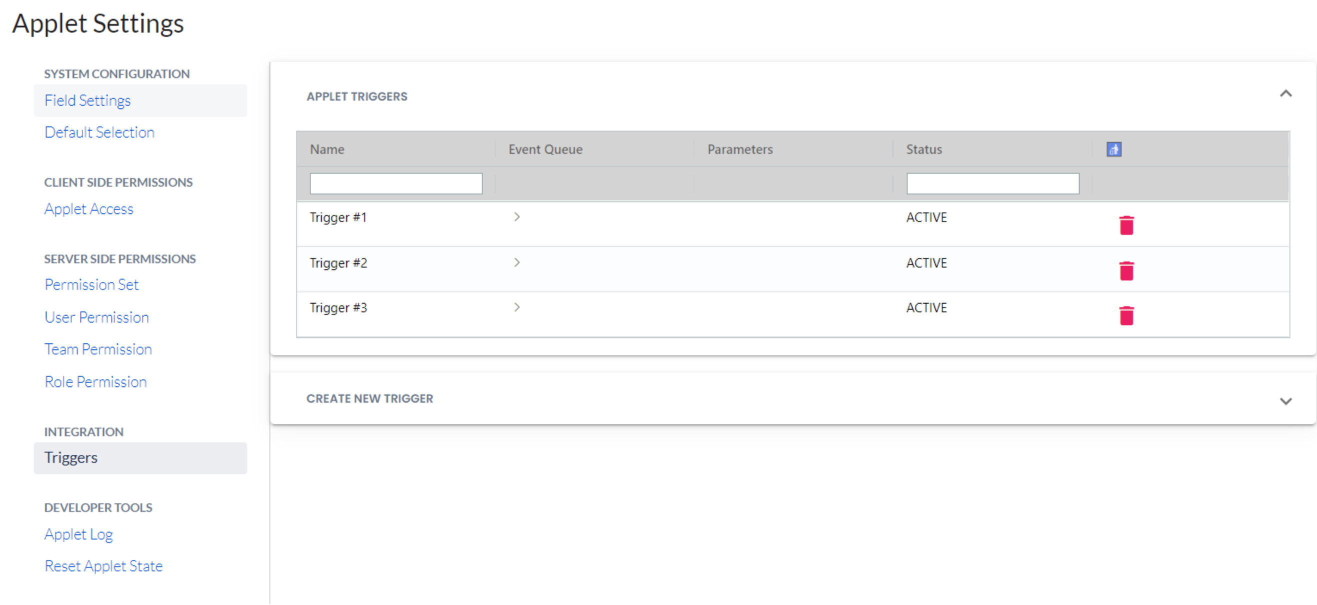
By clicking the + symbol, user can add new role to the list by providing name, code and status of the role.



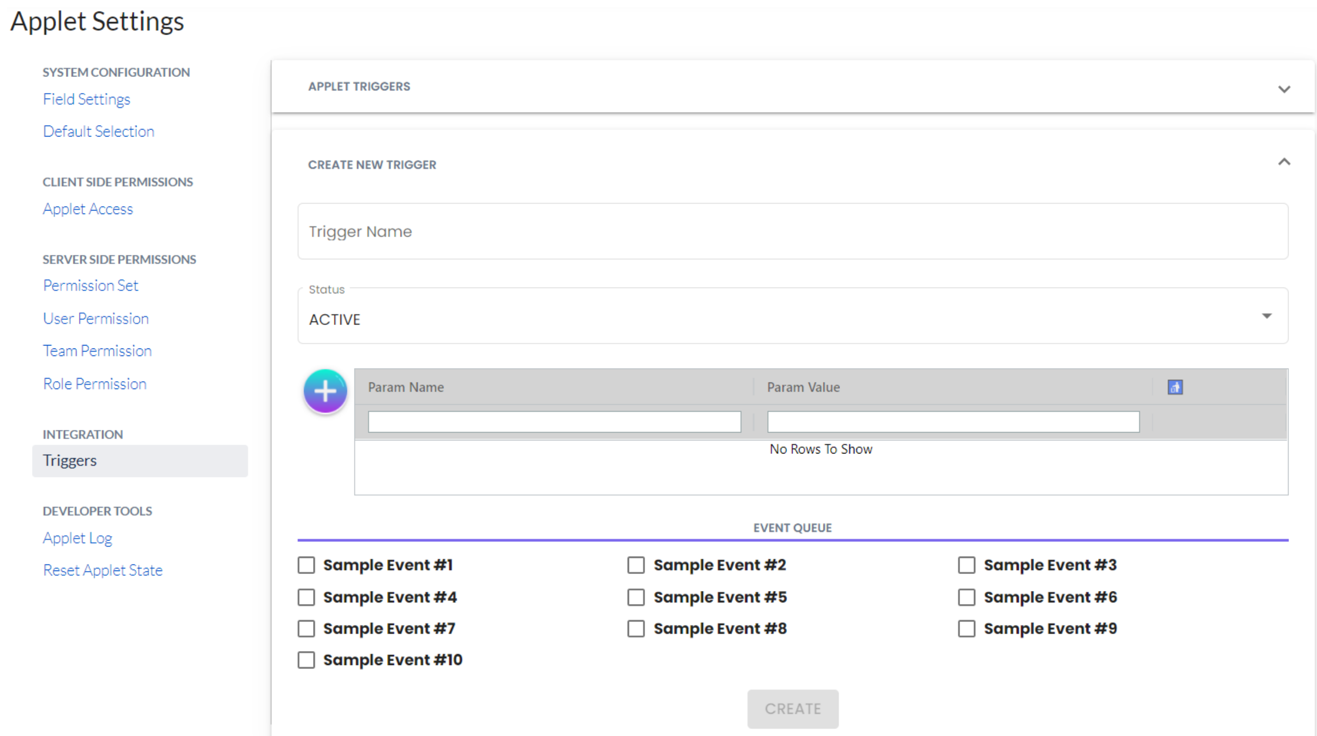
A.20.10.4. Integration

Triggers

User can check the triggers status and manage them under this menu.



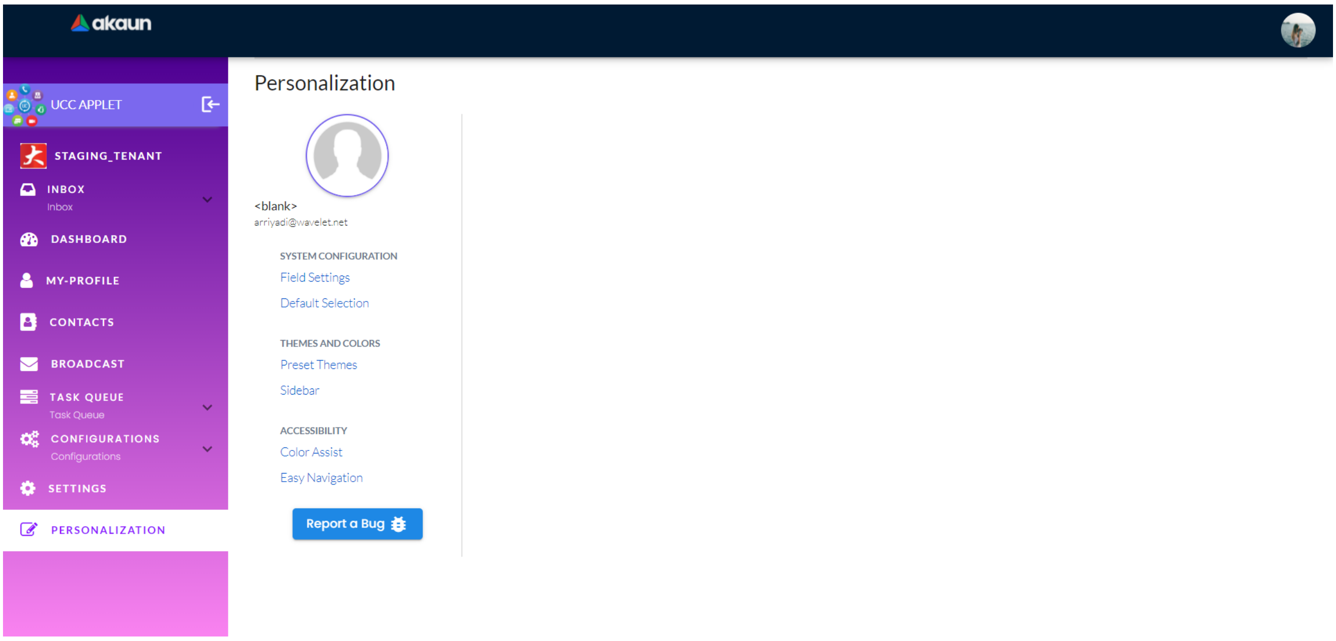
User can also create new triggers to the list.



A.20.10.5. Developer Tools

NOTE	The functionalities are still under development.

A.20.11. Menu 09 - Personalization

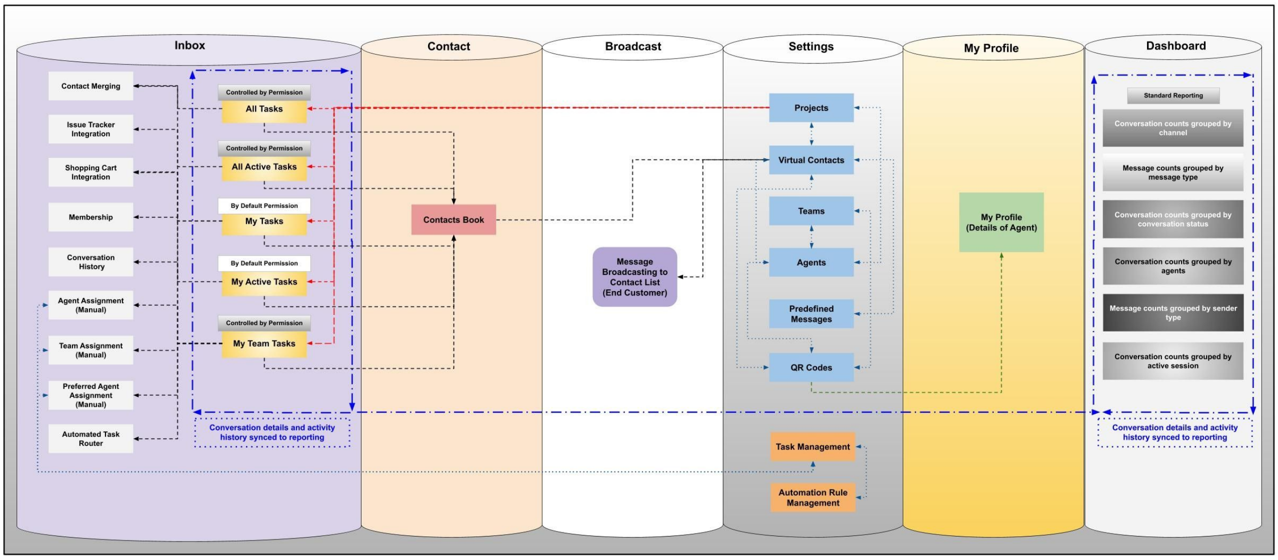


NOTE The functionalities are still under development.

A.20.12. Implementation

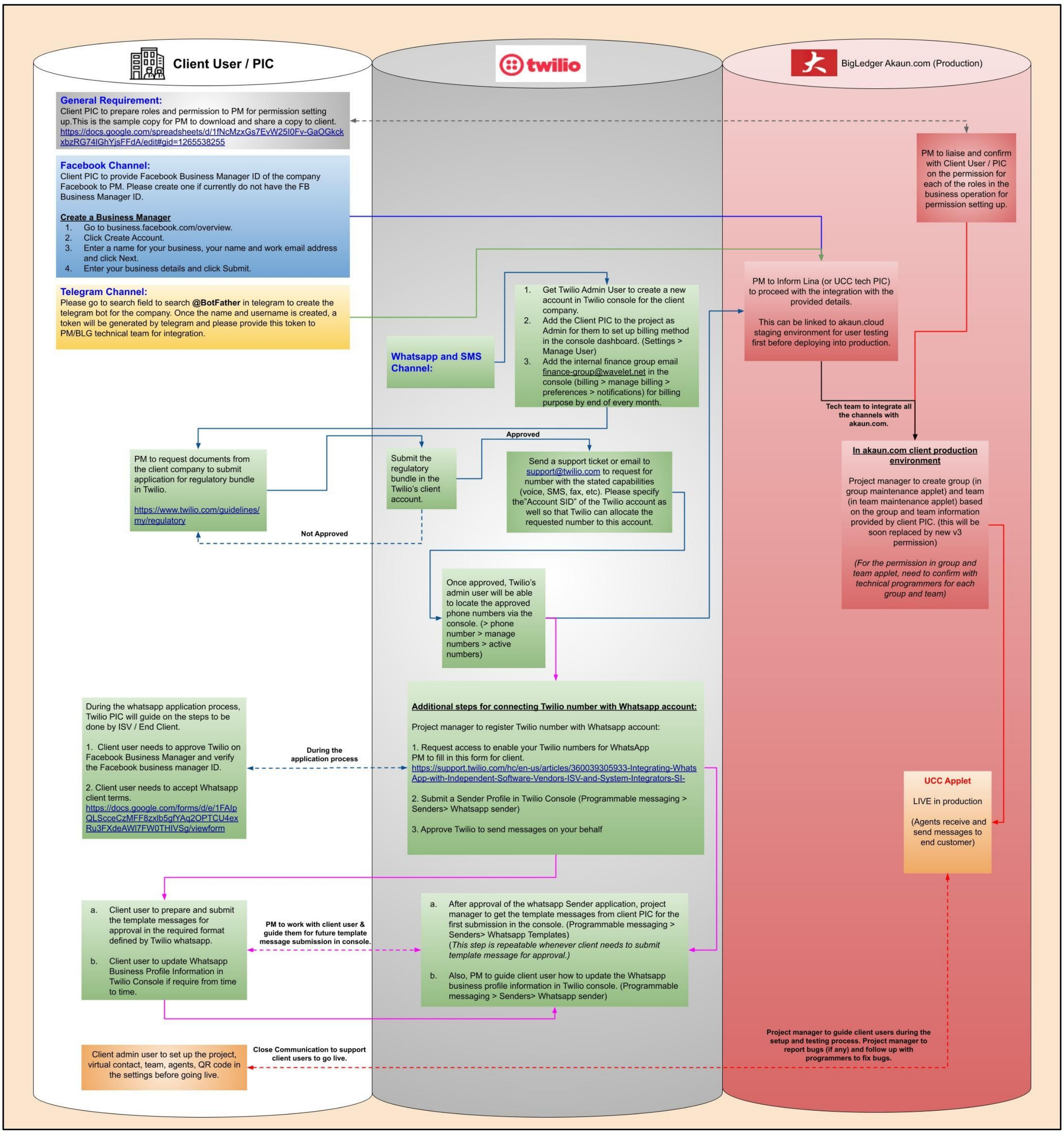
A.20.12.1. High Level Features Workflow

UNIFIED CONTACT CENTRE (UCC) HIGH LEVEL FEATURES WORKFLOW



A.20.12.2. Implementation Workflow of Telegram, Facebook, Whatsapp & SMS

UNIFIED CONTACT CENTRE (UCC) IMPLEMENTATION WORKFLOW (FB, Telegram, Whatsapp & SMS)

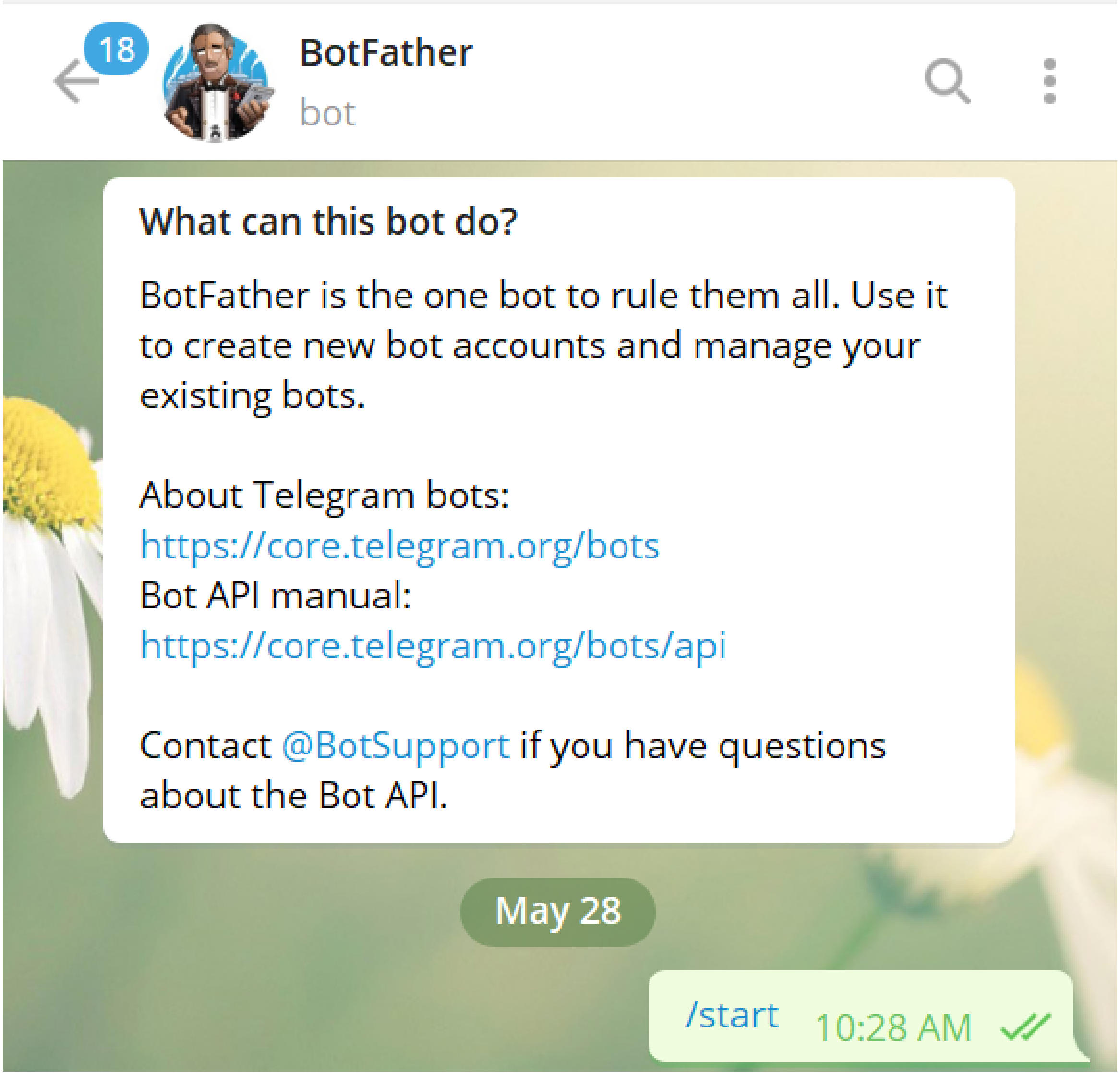


A.20.12.3. Telegram Implementation

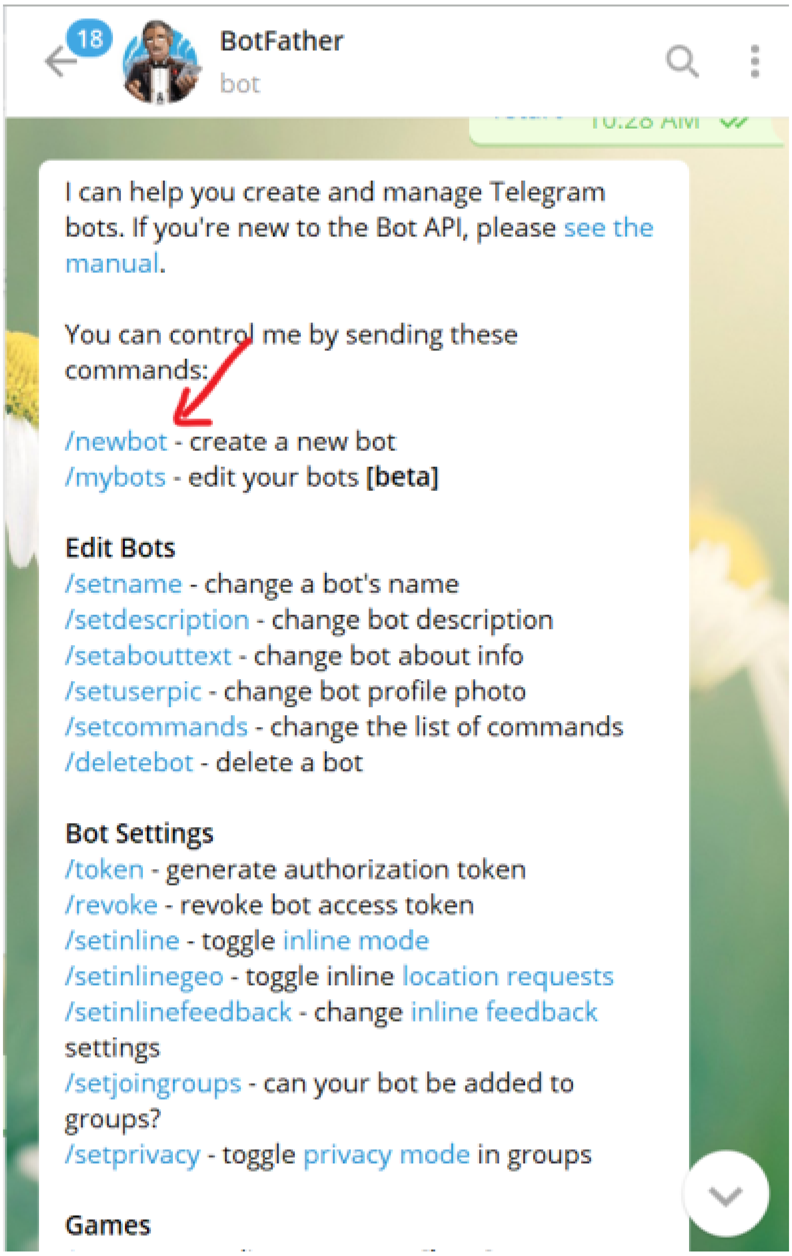
How to create a new telegram bot and generate token?

1. Client PIC needs to follow the steps below to create a new telegram bot and pass the token to Project Manager for UCC integration.

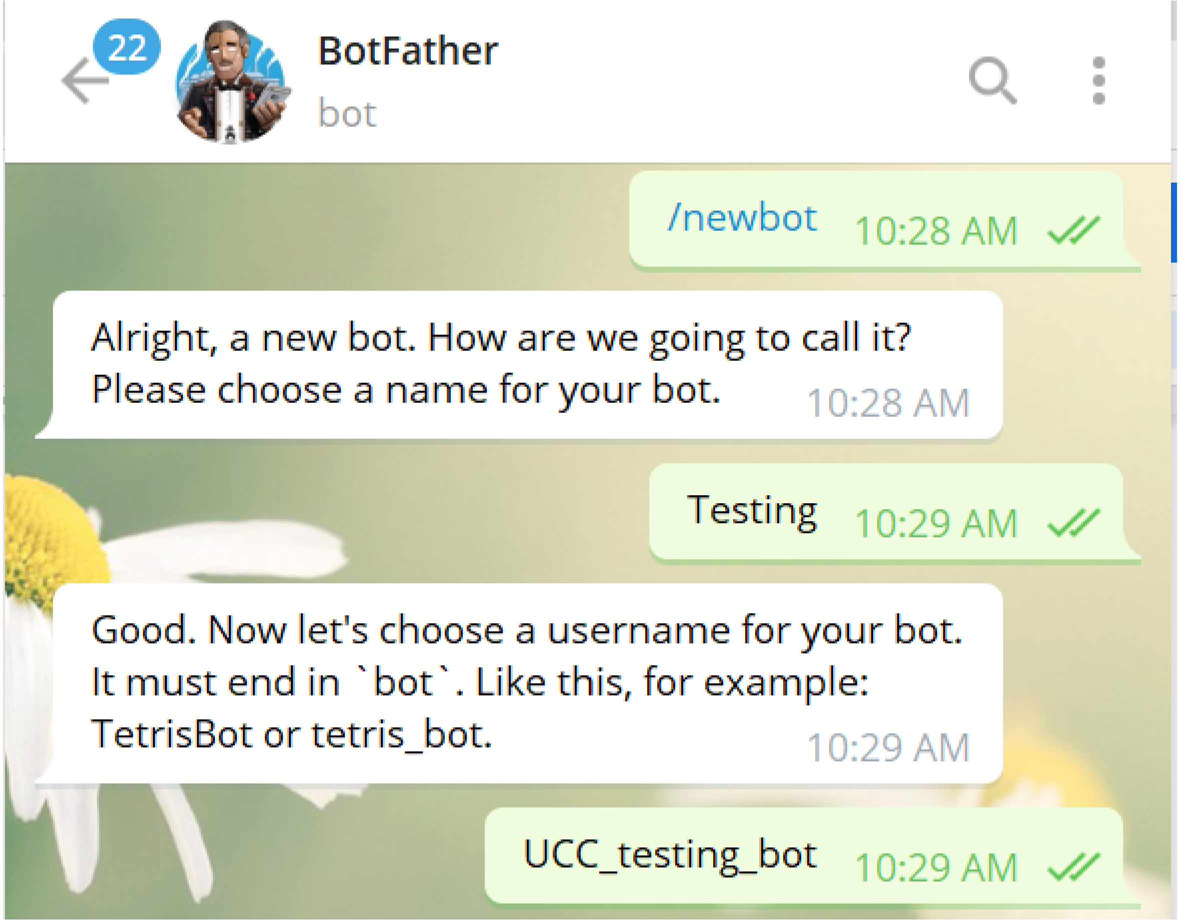
Please go to the search field and type **botfather**.



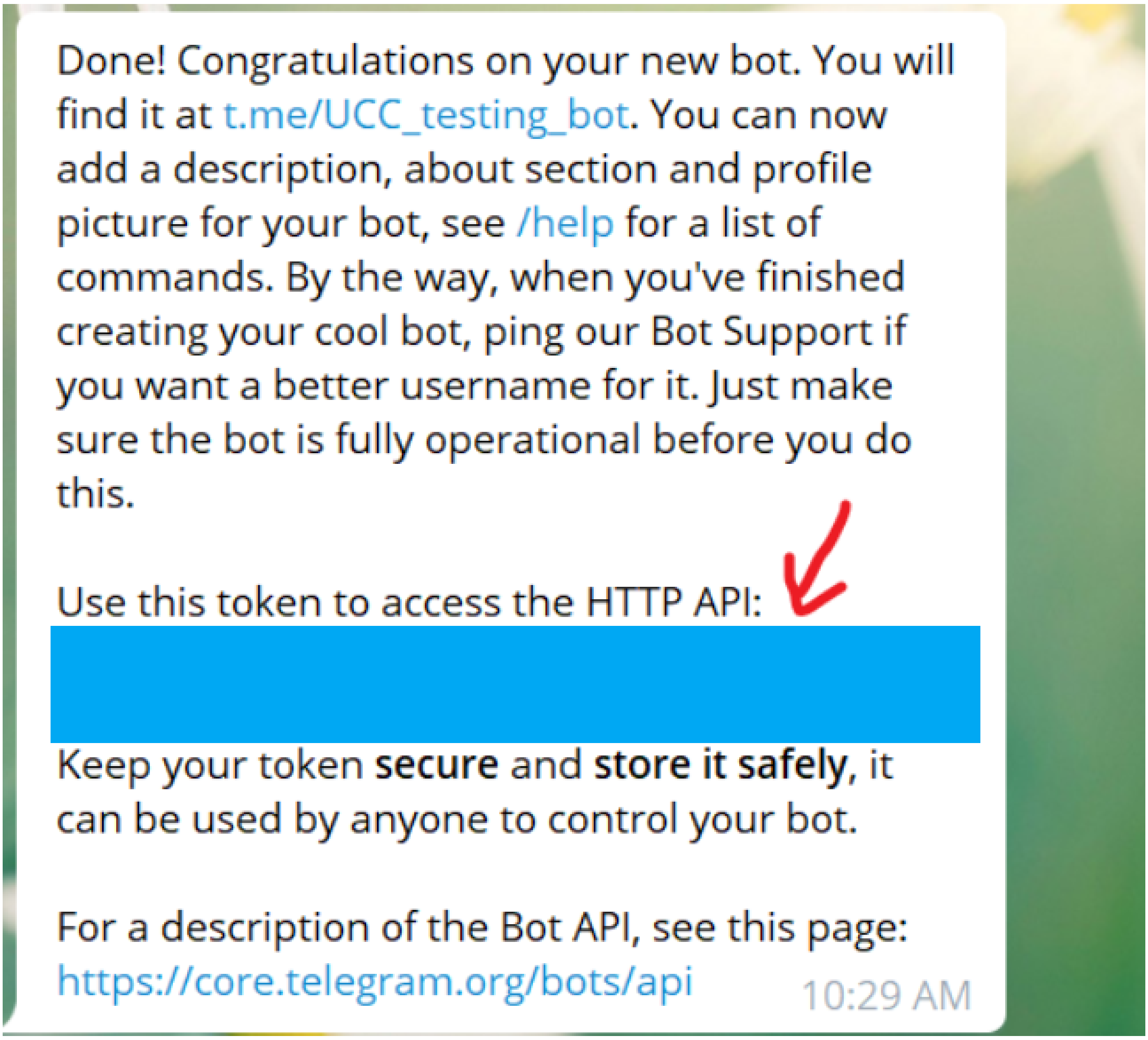
Once you enter this bot, please start the bot.



Please click /newbot to create a new bot.



Then, you will need to create a name and a username for your bot.



And you are done. Kindly copy the token and pass it to us. Thank you.

NOTE	PM to pass the token to technical team for integration.

A.20.12.4. Facebook Implementation

Client PIC to provide Facebook Business Manager ID of the company Facebook to PM. Please create one if currently do not have the FB Business Manager ID.

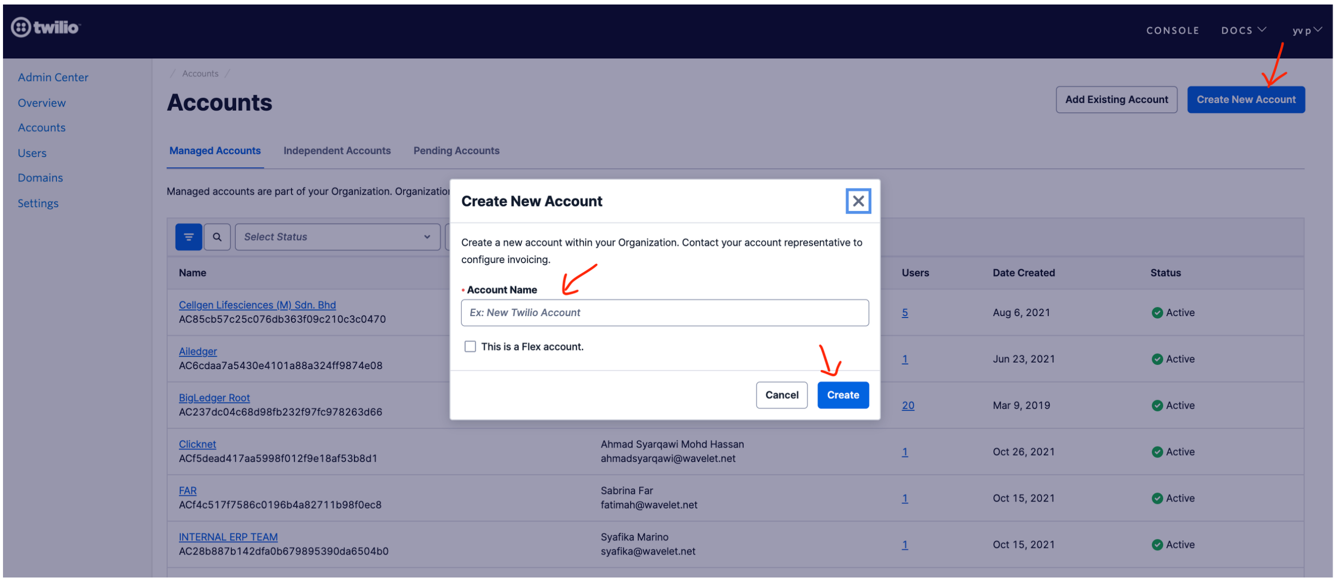
Create a Business Manager

1. Go to Meta Business Suite and Business Manager Overview .
2. Click Create Account.
3. Enter a name for your business, your name and work email address and click Next.
4. Enter your business details and click Submit.

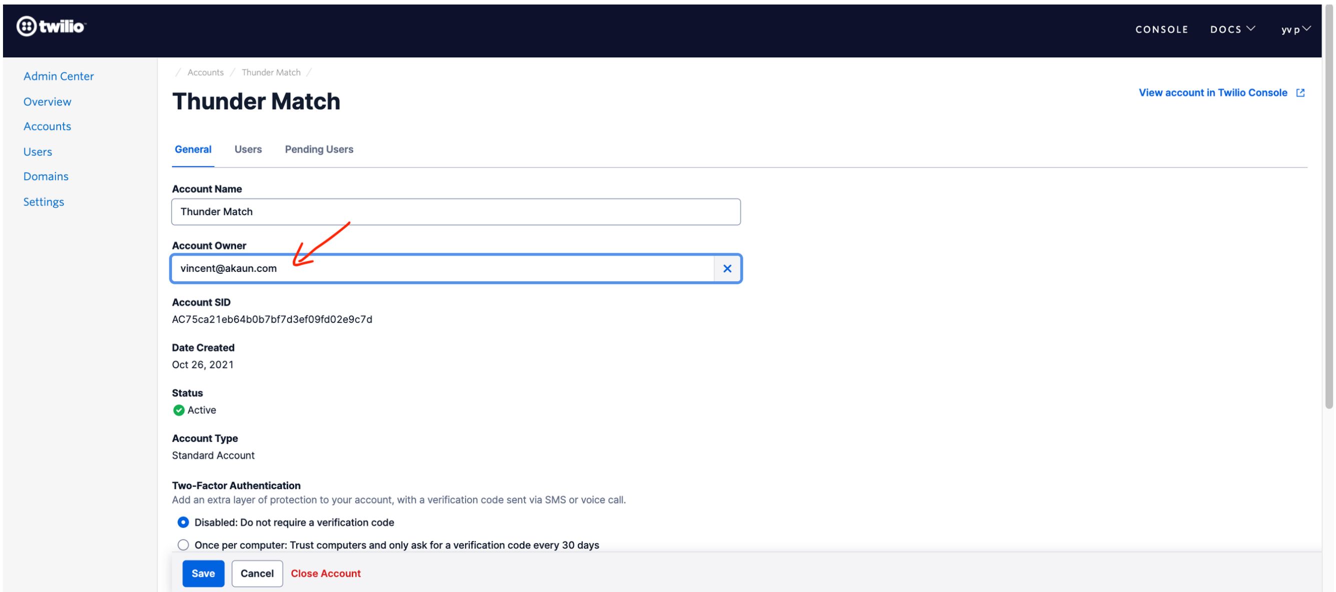
A.20.12.5. Whatsapp & SMS : Twilio Whatsapp Application User Guide

Section 1.0 : Twilio Account Creation

1.1 Project manager to request Twilio Admin User to create a new account in Twilio console for the client company. https://www.twilio.com/console/admin/managed-accounts



1.2 Please make sure that you assign to to be the account owner of all accounts that you have created for client project and click "Save" to proceed.

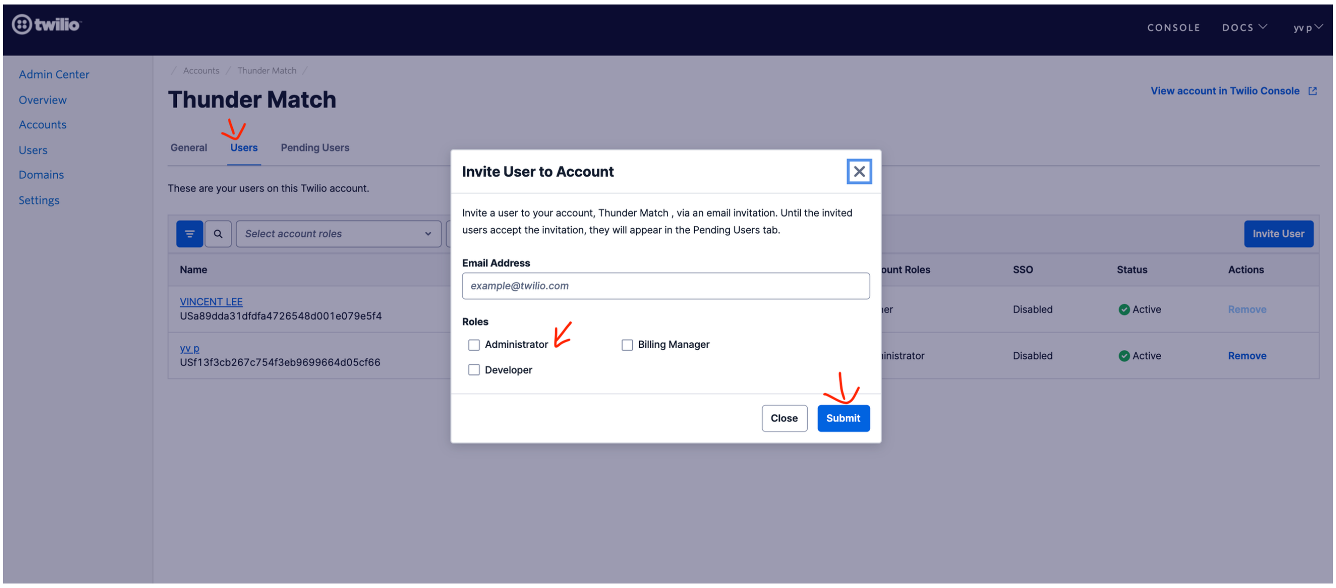


Section 2.0: Twilio - Provide administrator access to client admin user

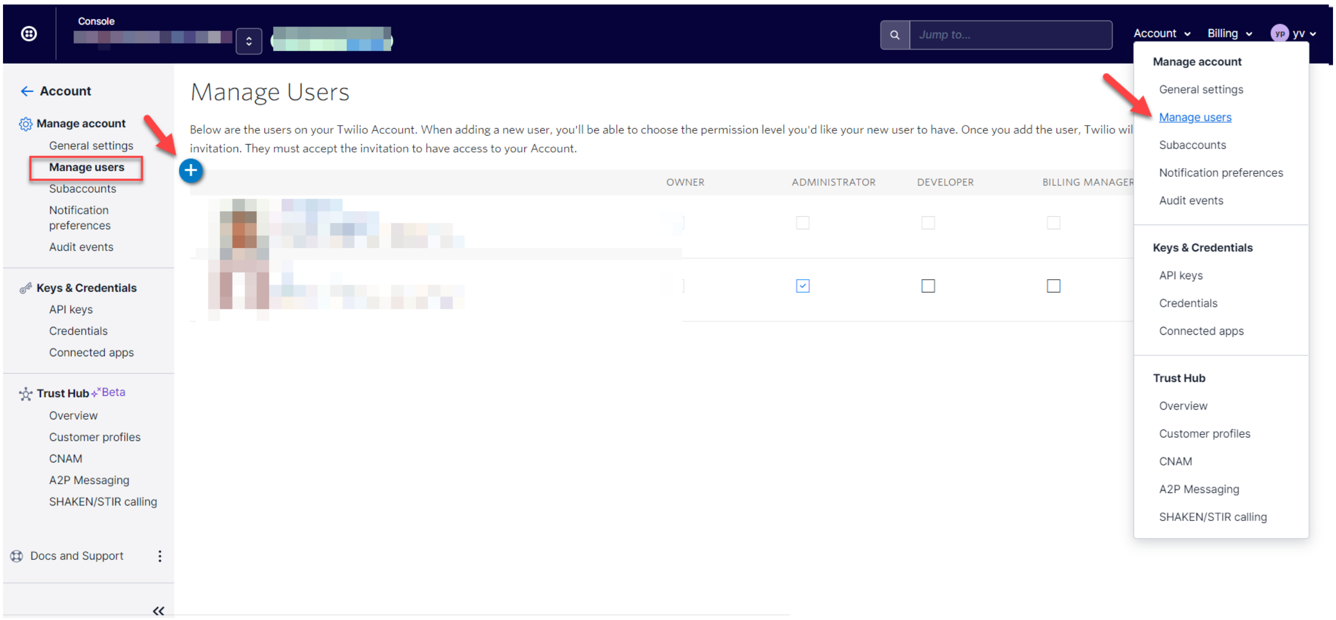
2.1 Project manager to provide the client user an admin access to access into the console for billing matters and WhatsApp related services.

The project manager will give admin permission to this user email in the Twilio console. This admin user will then need to login to Twilio console and set up the payment details for Twilio WhatsApp service.

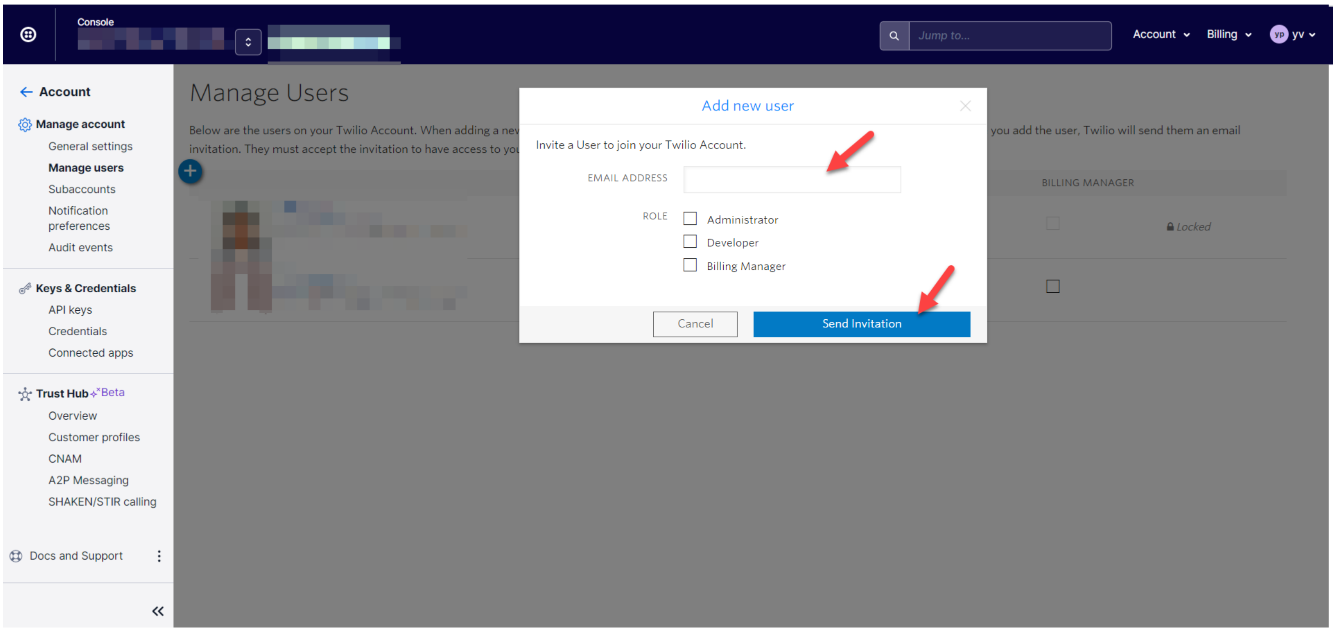
And also, kindly add Lina@wavelet.net as administrator as well for the Whatsapp configuration in all the Twilio console client account.



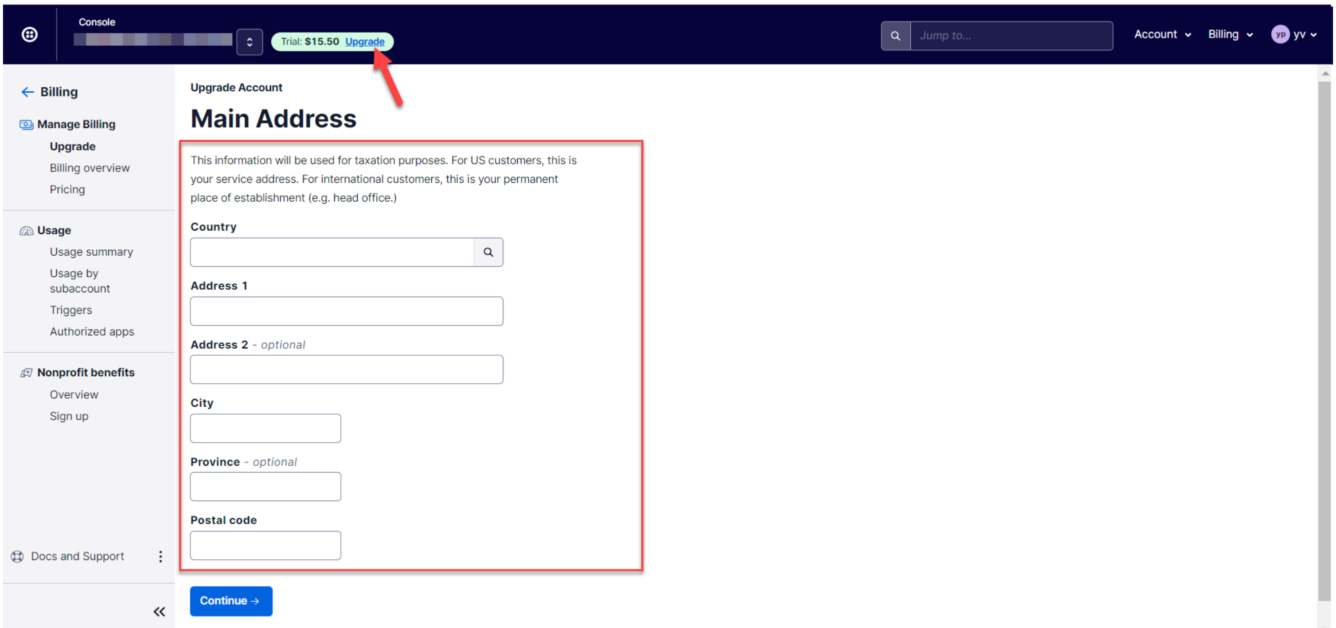
2.2 Alternatively, you also can add or manage the user in the menu below as well.



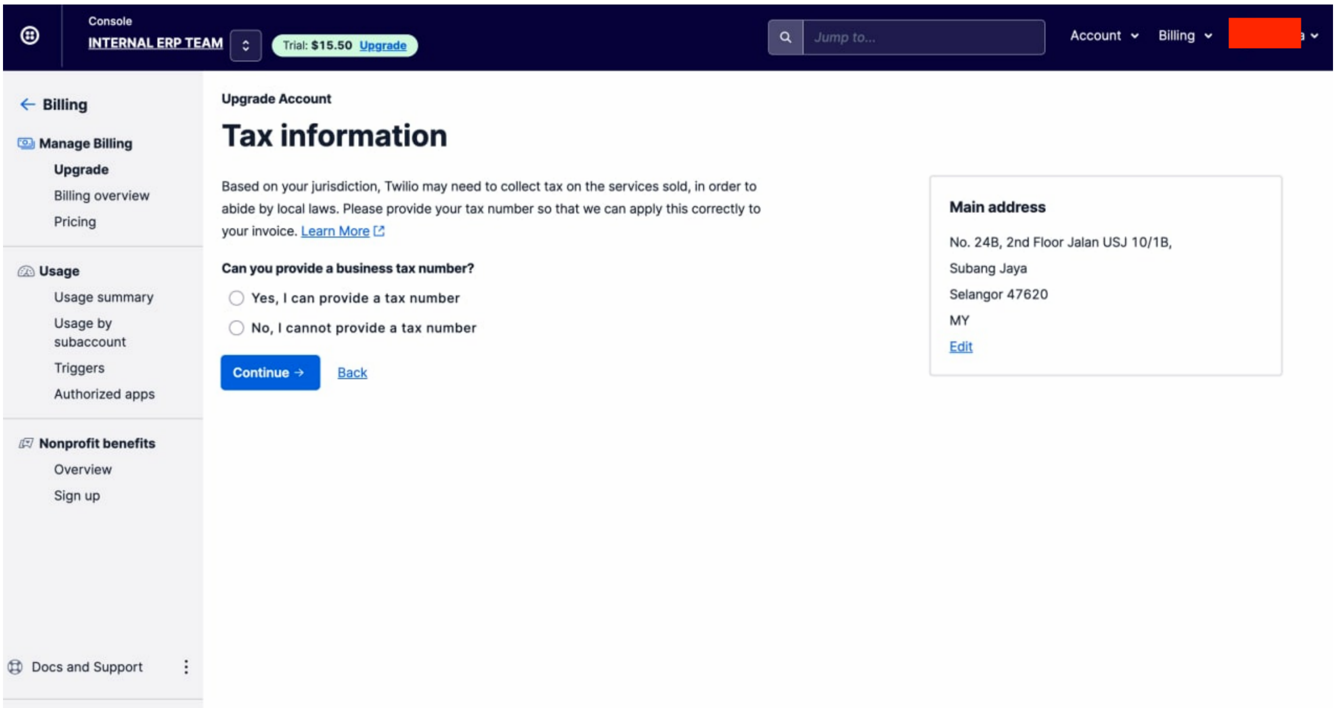
Please go to the top right menu “Account” > manage account >manage users to add the user.



2.3 Once the client admin accepts the invitation, the client admin can login to the console and tie the credit card details. This step is crucial before requesting the number as the payment for the number will be auto-deducted from the credit card in the account once the number is successfully requested and allocated by Twilio.



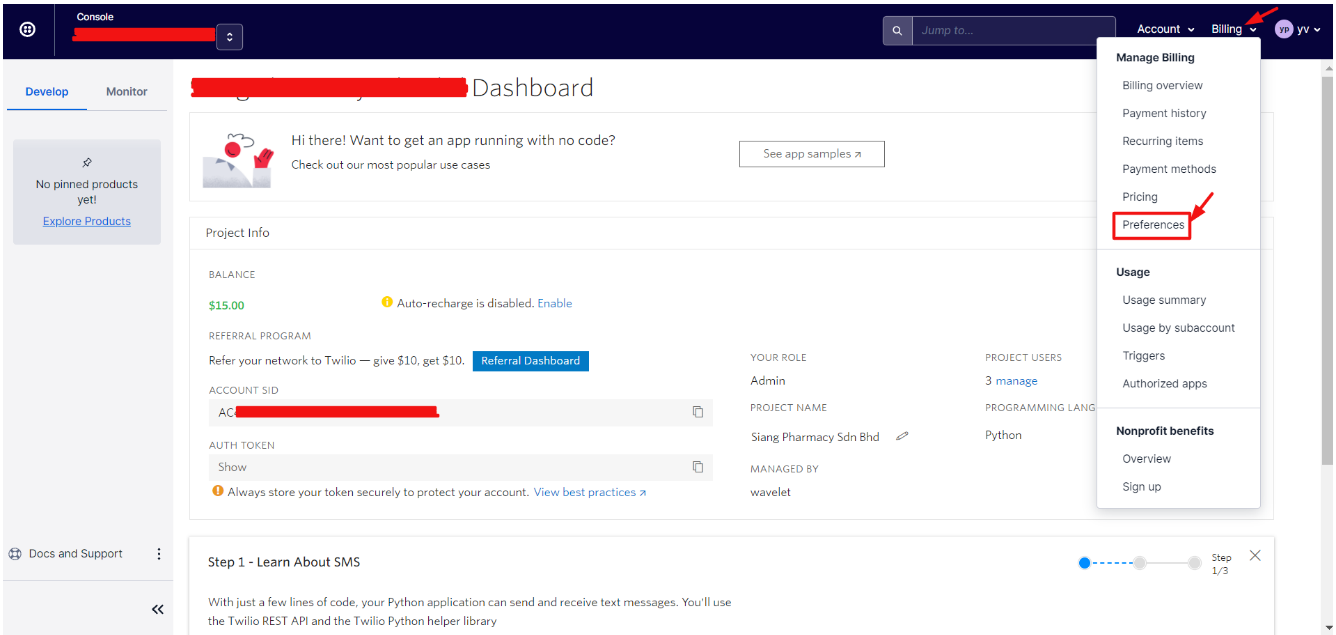
Once Client PIC fill up the above details and click "Continue", it will direct them to the payment page to tie with their payment methods.



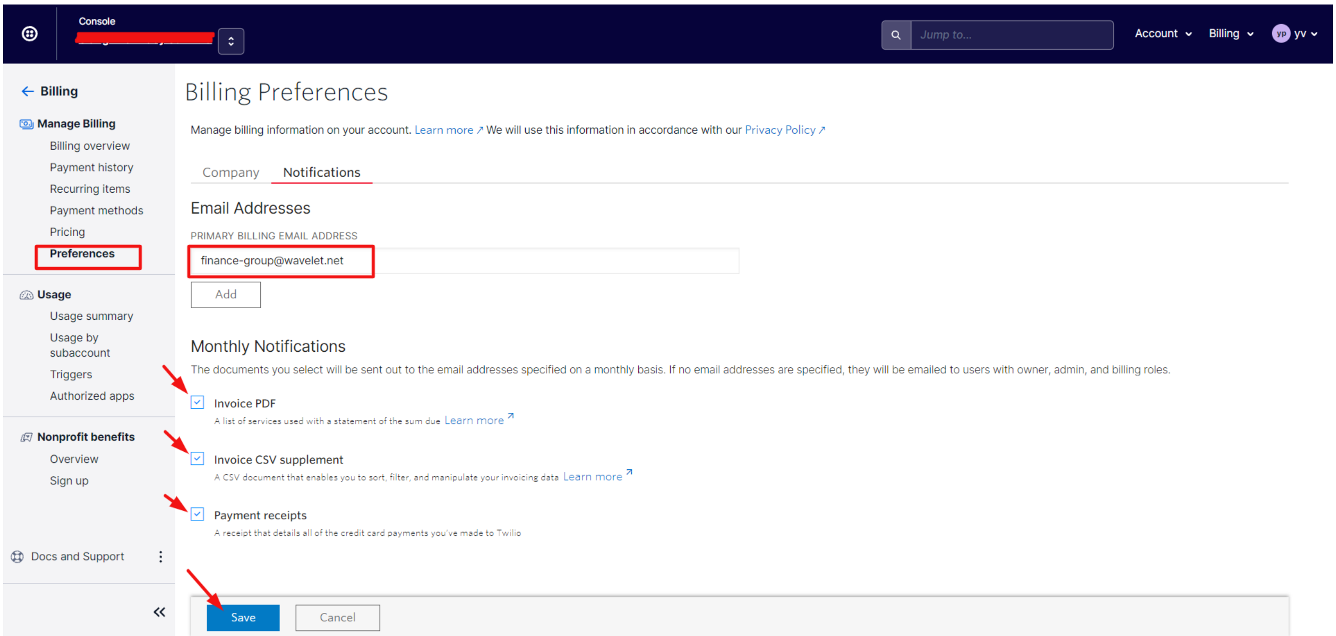
The client PIC can proceed with the selected options, continue to complete the setup of payment page.

Section 3.0: To add the internal finance group email finance-group@wavelet.net in the console

3.1 Please go to the Billing > Manage Billing > Preferences.



3.2 Under the "Notification" menu, please enter the finance-group@wavelet.net as the primary billing email address. Of course, you may add more email addresses for billing purpose if required. Then, check the boxes for invoice PDF, Invoice CSV supplement, and Payment receipts. After that, click "Save" to save the billing preferences.



Section 4.0: Twilio - Regulatory Bundle Application

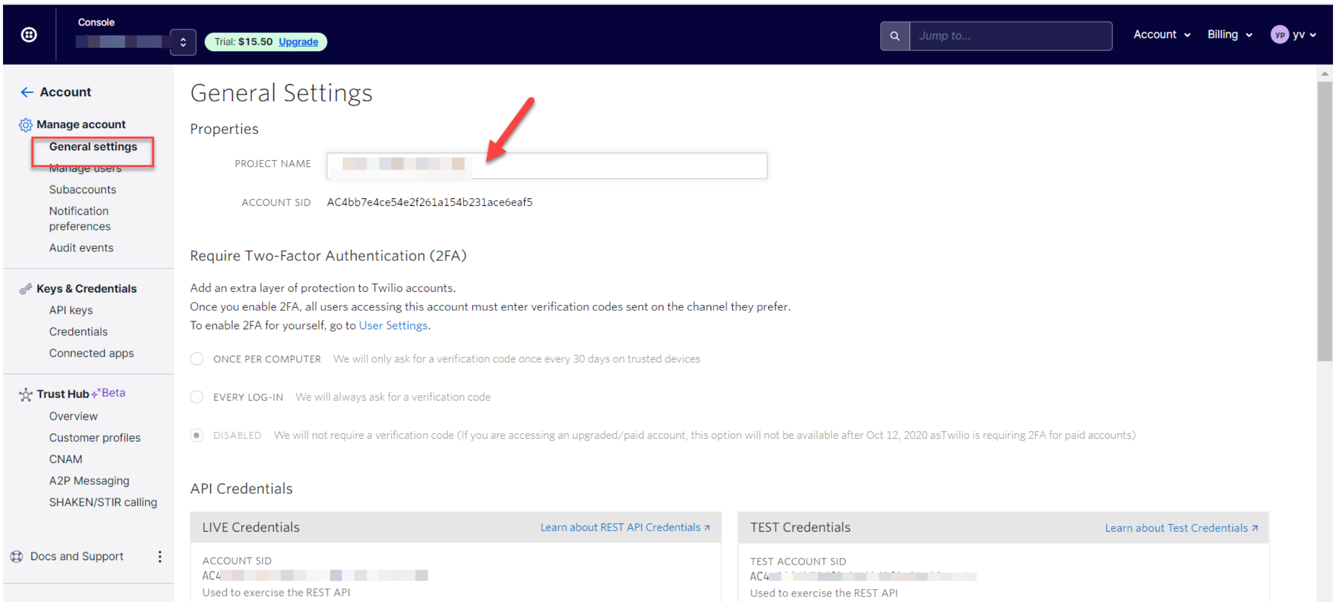
4.1 Project manager to request the required business documents from client PIC to proceed with Twilio Regulatory Bundle Application. Malaysia: Regulatory Guidelines

*Please take note that this is a Malaysia Mobile Number Application for SMS and Whatsapp service via Twilio.

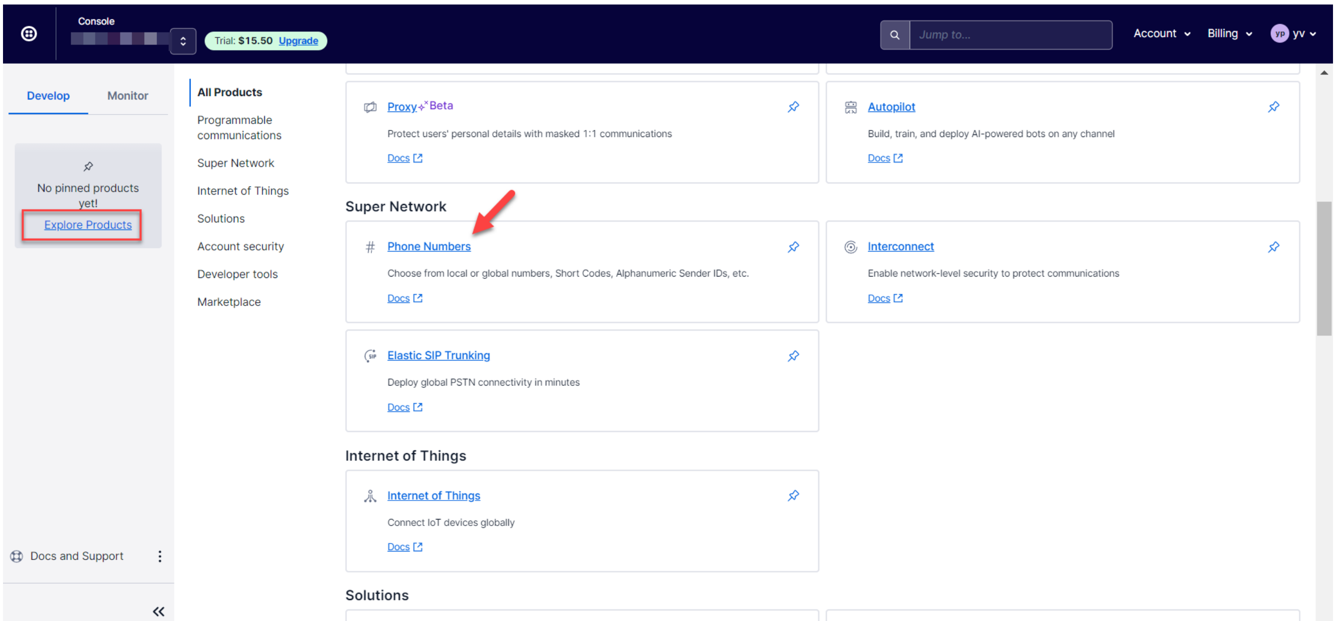
Requirements for Businesses

Information Required	Documentation Required	Acceptable Documentation *One of the following*
Business Name	Proof of Identity	• Business registration
Business Address *Must be within Malaysia*	Proof of Malaysian Address	• Business registration showing Malaysian address
Name of Authorized Representative	Proof of Identity	• Government-issued ID with picture • Passport
Identity Document Number of Authorized Representative	Proof of Identity Document Number	• Government-issued ID • Passport
Identity Document Issuing Country of Authorized Representative	Proof of Identity Document Issuing Country	• Government-issued ID • Passport
Address of Authorized Representative *Must be within Malaysia*	Proof of Malaysian Address	• Government-issued ID showing Malaysian address (for Malaysian citizens or permanent residents) • Work permit showing company and company address (for non-Malaysian citizens) • Student ID showing university address (for non-Malaysian citizens)
Letter of Authorization for Authorized Representative	Proof that representative is authorized to act on behalf of the business	• Executed Letter of Authorization

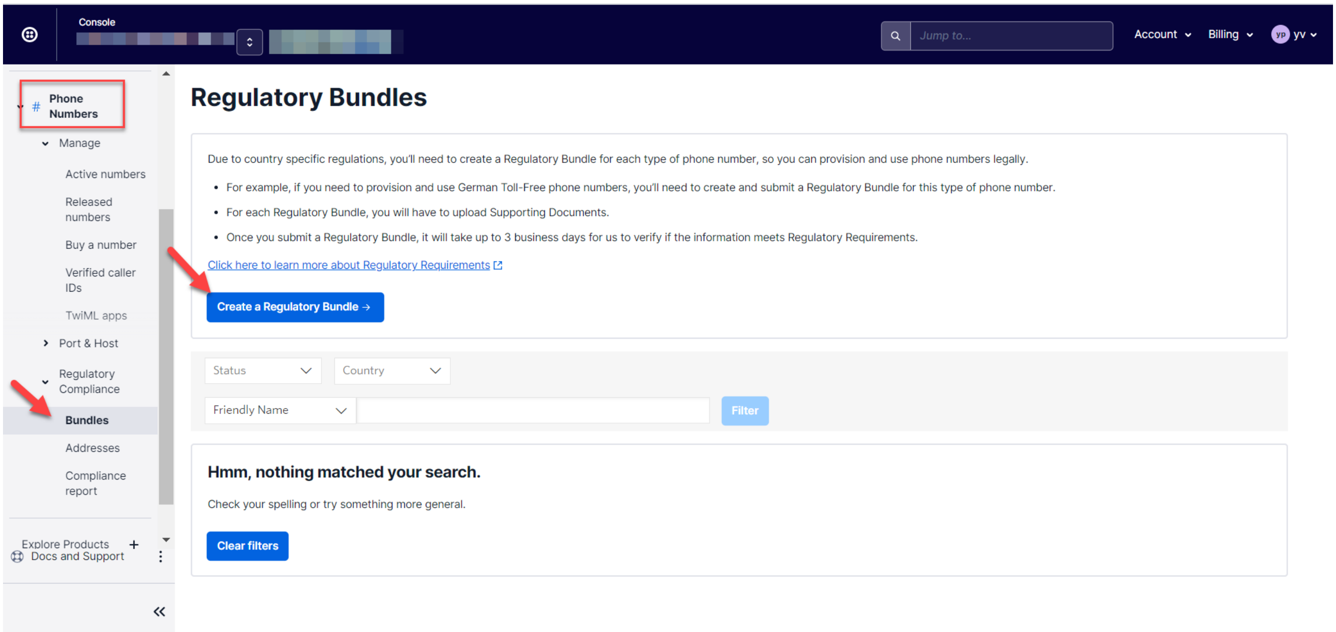
4.2 The project manager will proceed with the regulatory compliance bundle application as shown below in the console after the documents are submitted by the client.



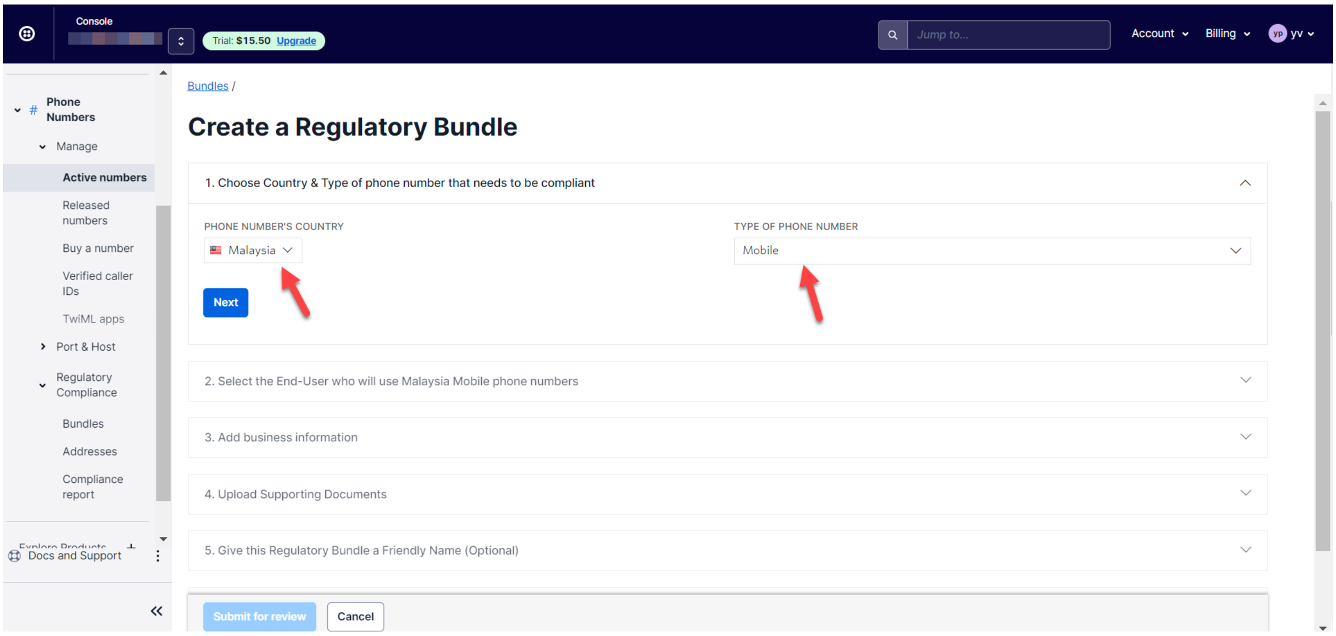
Project manager can change the “Project name” if required.



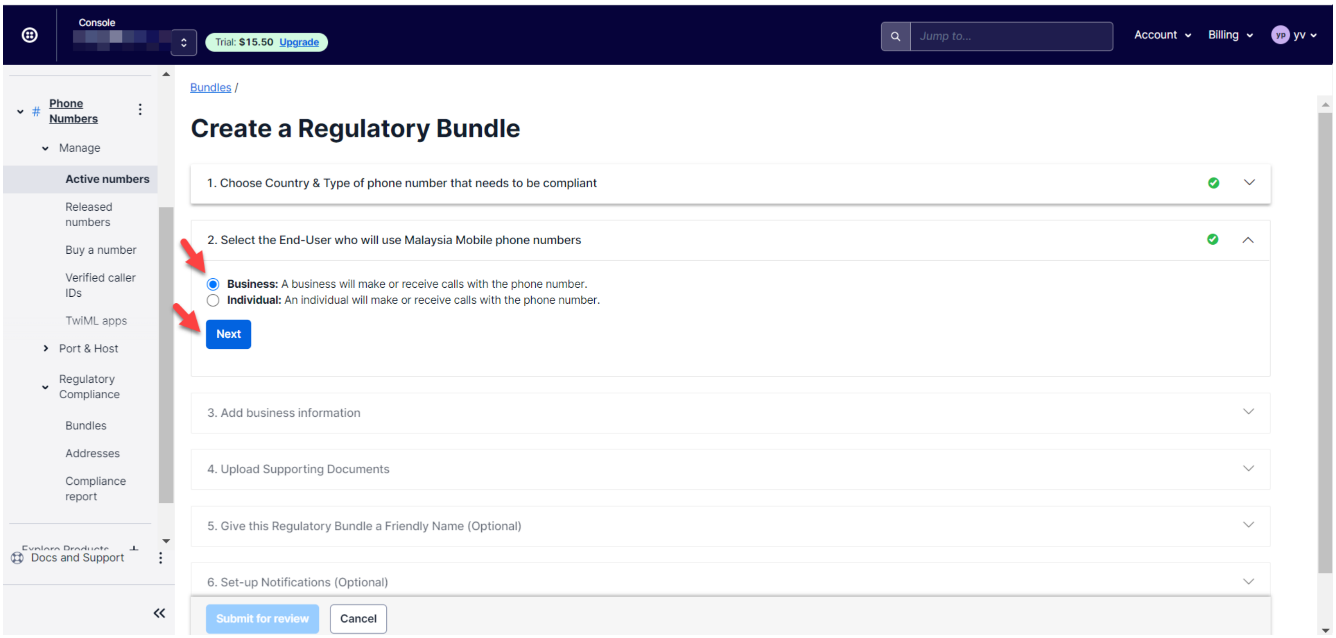
Please go to the “Explore Products” > Super Network > Phone Numbers.



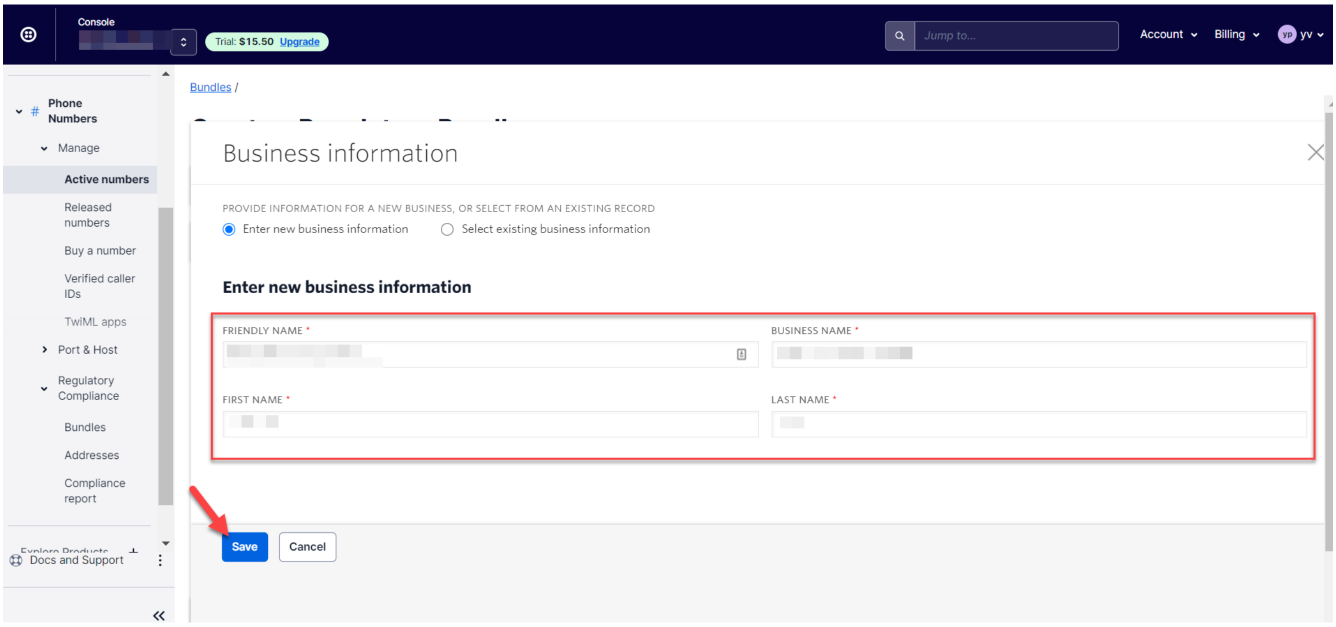
Please go to “Phone numbers” > Regulatory Compliance > Bundles > Create a Regulatory Bundle.



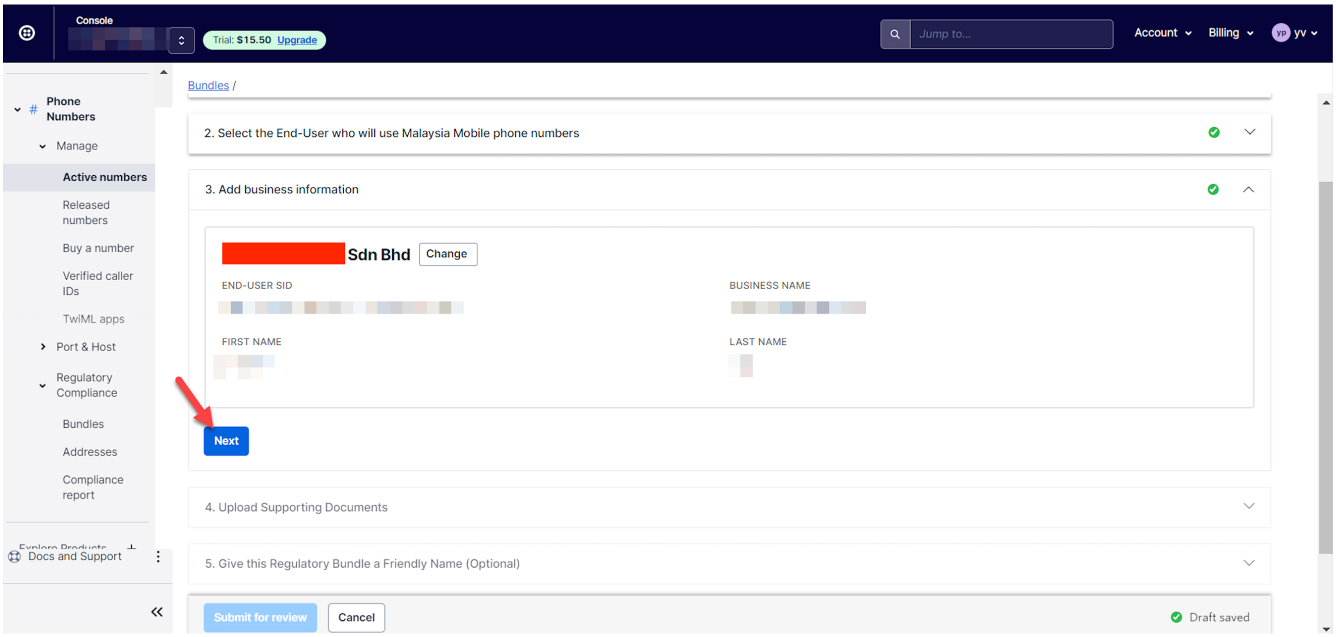
Please select the Phone number’s country and type of phone number.



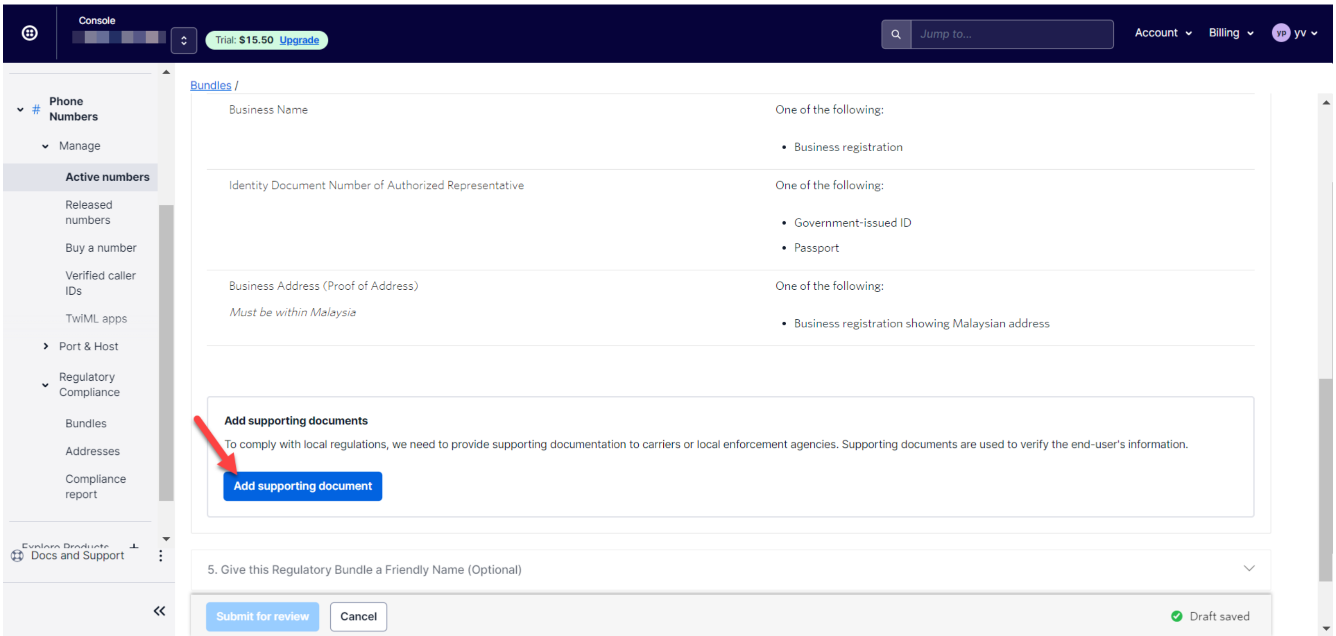
Next, please select "Business" if this is business application.



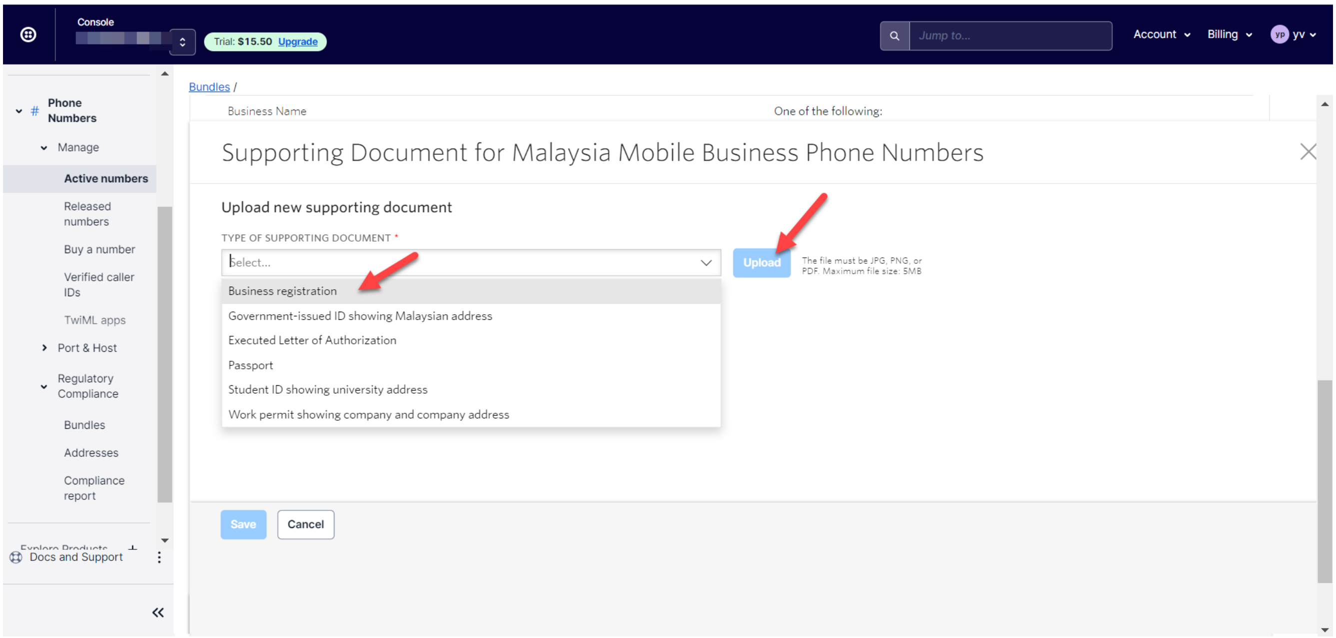
Next, please enter the business information. Friendly name and Business Name can be the same. Business Name has to be the official business name in the business registration form. First Name and Last Name is the name of the business owner / business representative for this Twilio application. Kindly take note this first name and last name should all the time matched with the business owner/business representative name that you are going to submit in the next and every steps later.



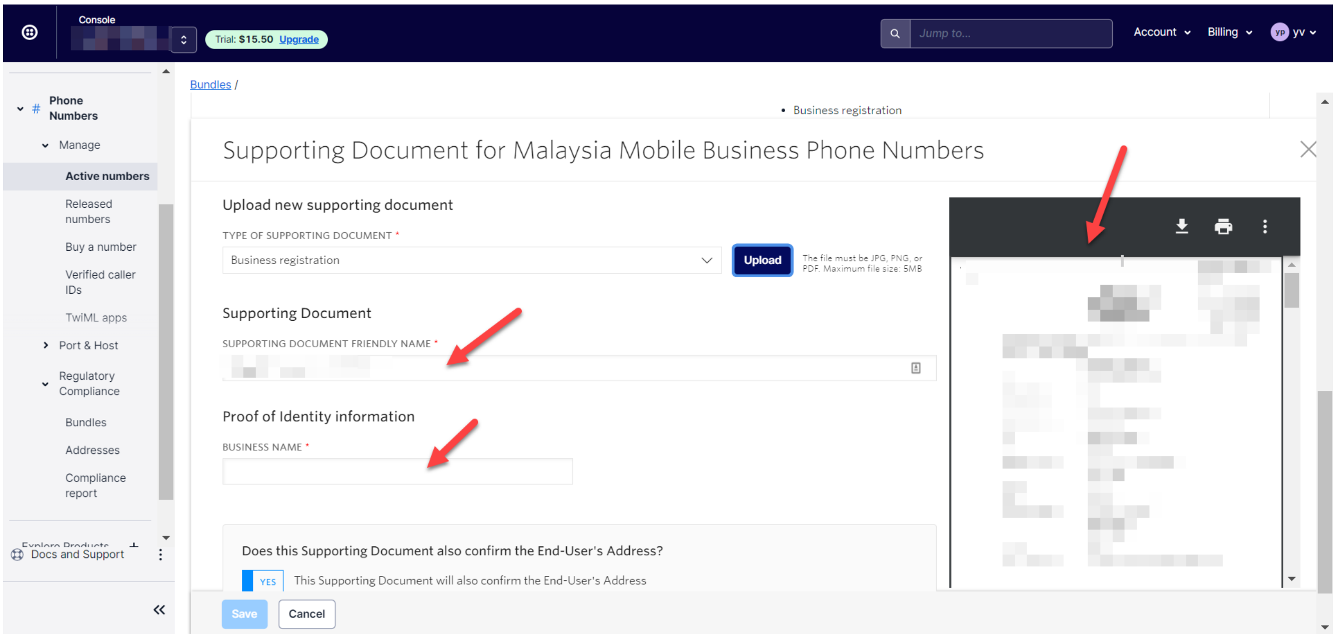
After the business information is added, please click “Next” to proceed.



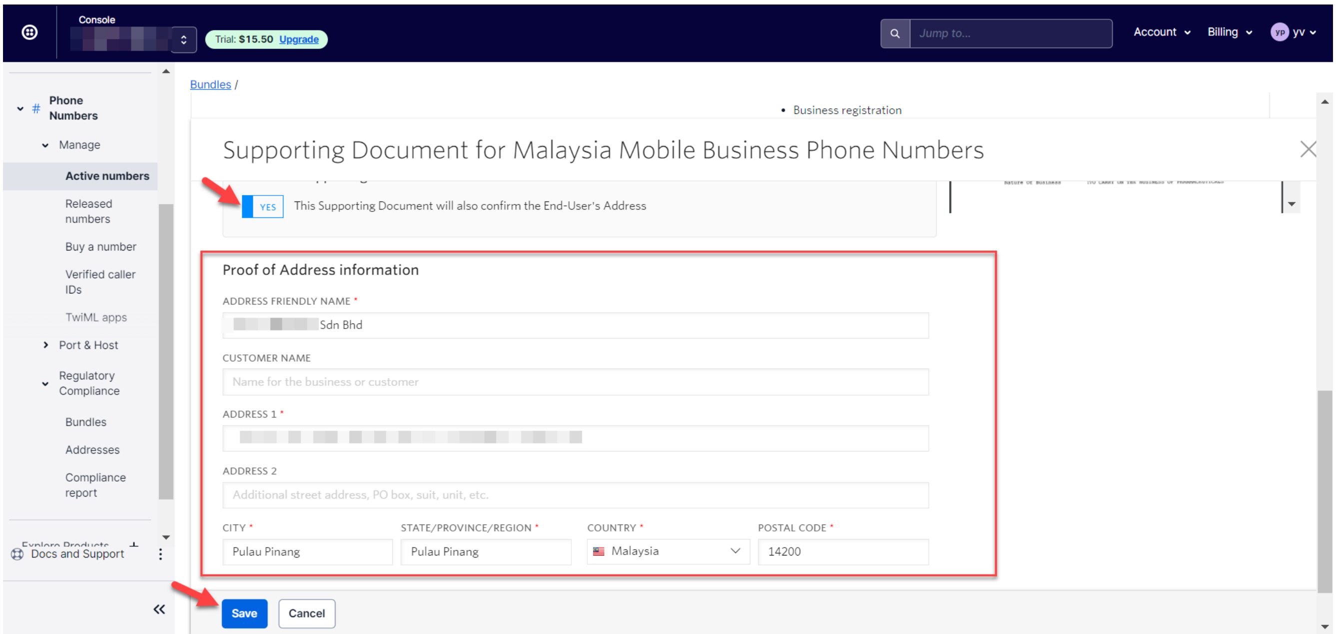
Now, please add the supporting documents requested from client PIC here.



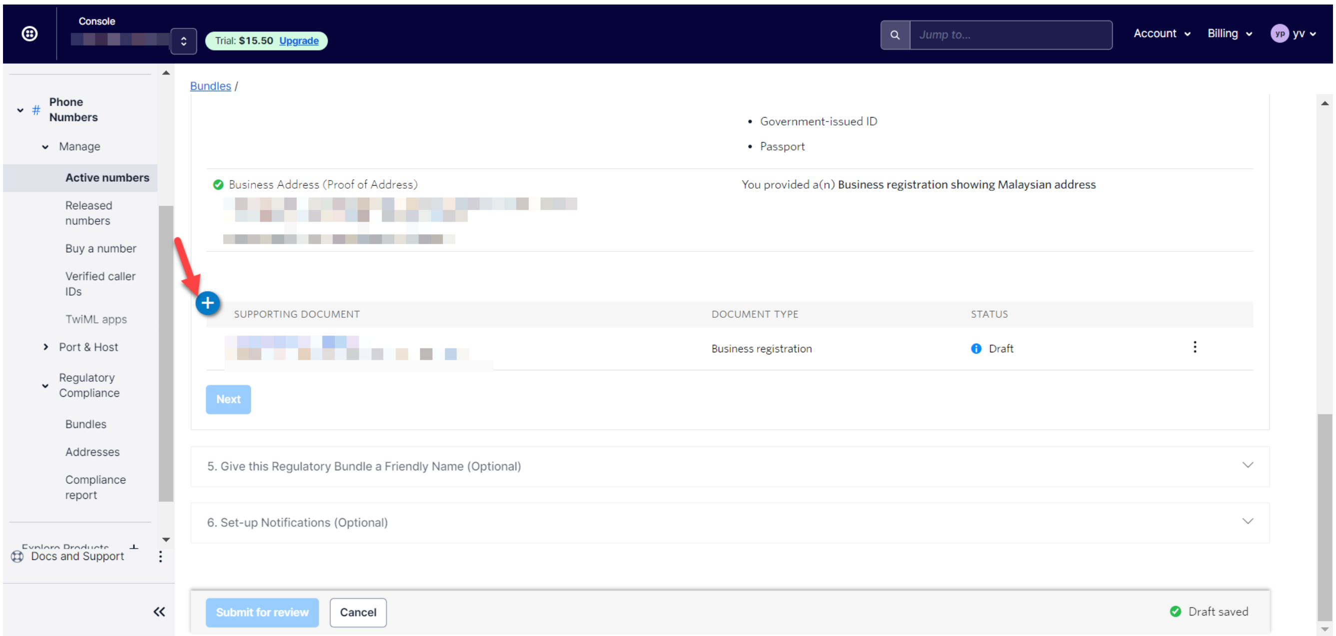
Please select the supporting document from dropdown list and click "upload".



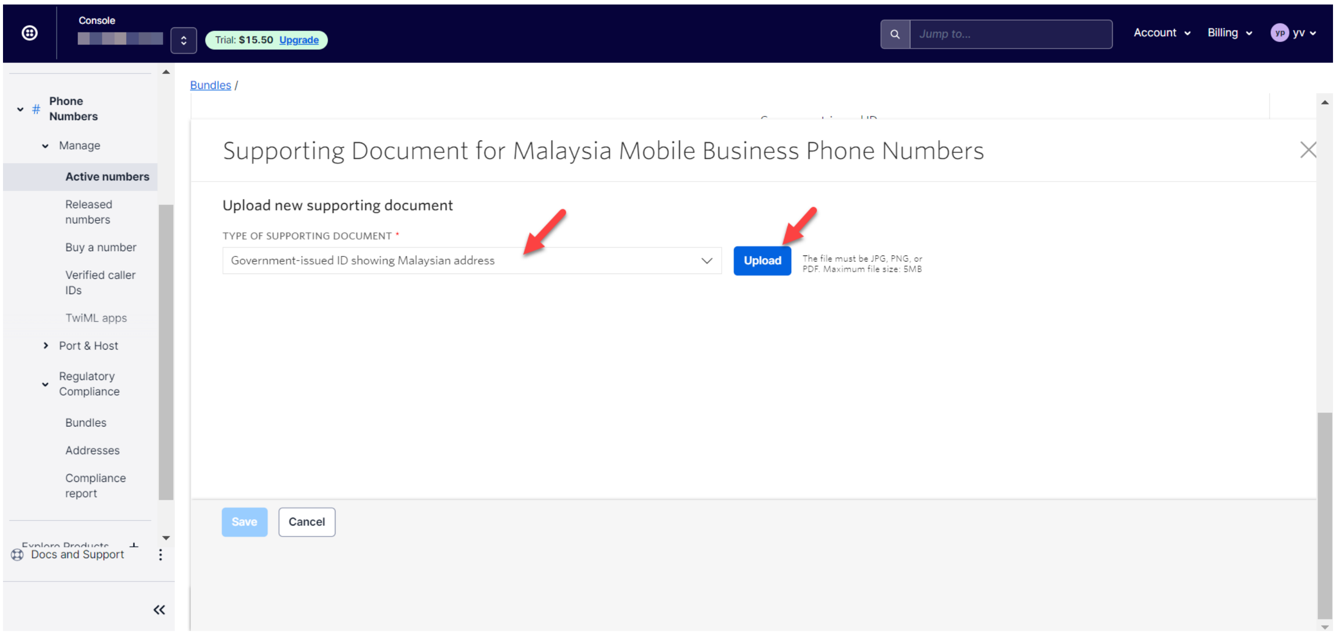
You may rename the name of the supporting document and make sure to enter the business name based on the uploaded document.



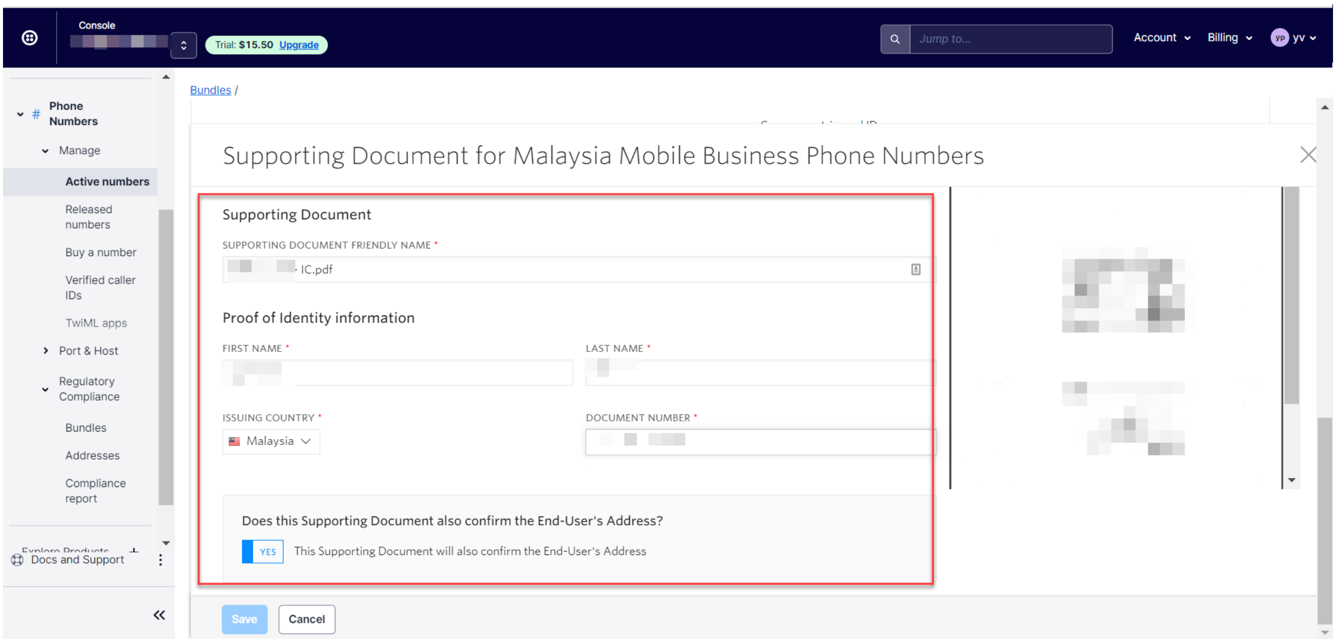
Please enter all the fields based on the business address in the uploaded business registration form and click “Save” to proceed.



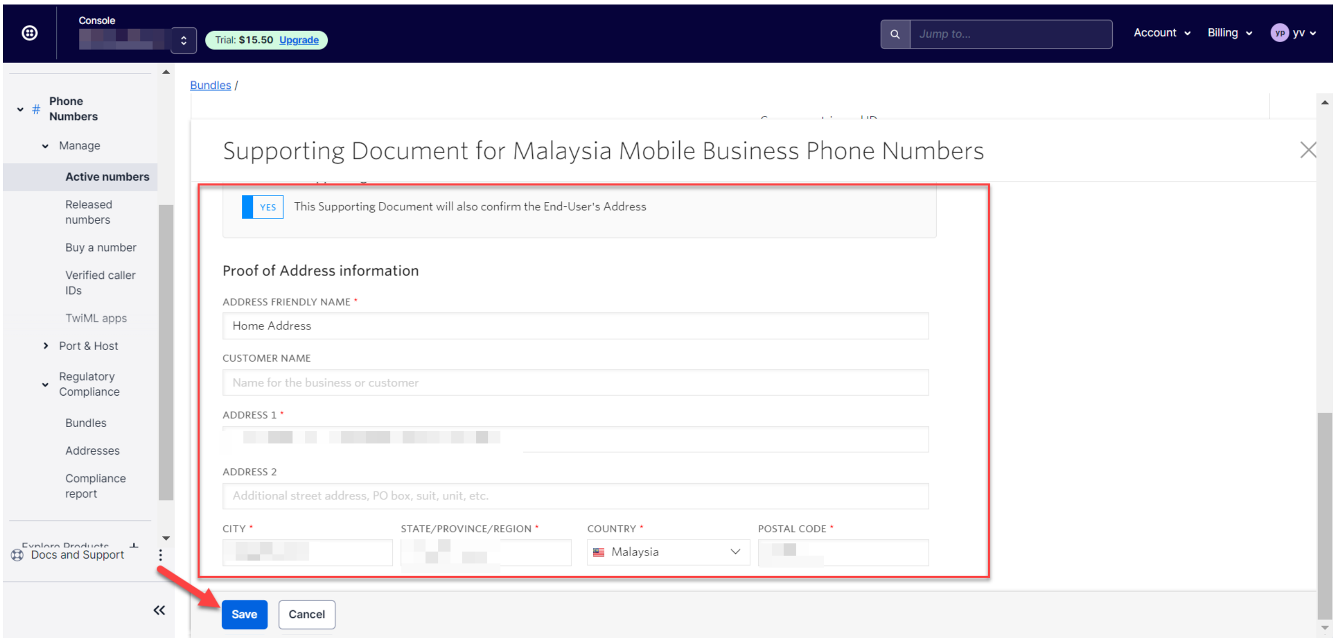
Next, please click the “+” button to add in the next supporting document.



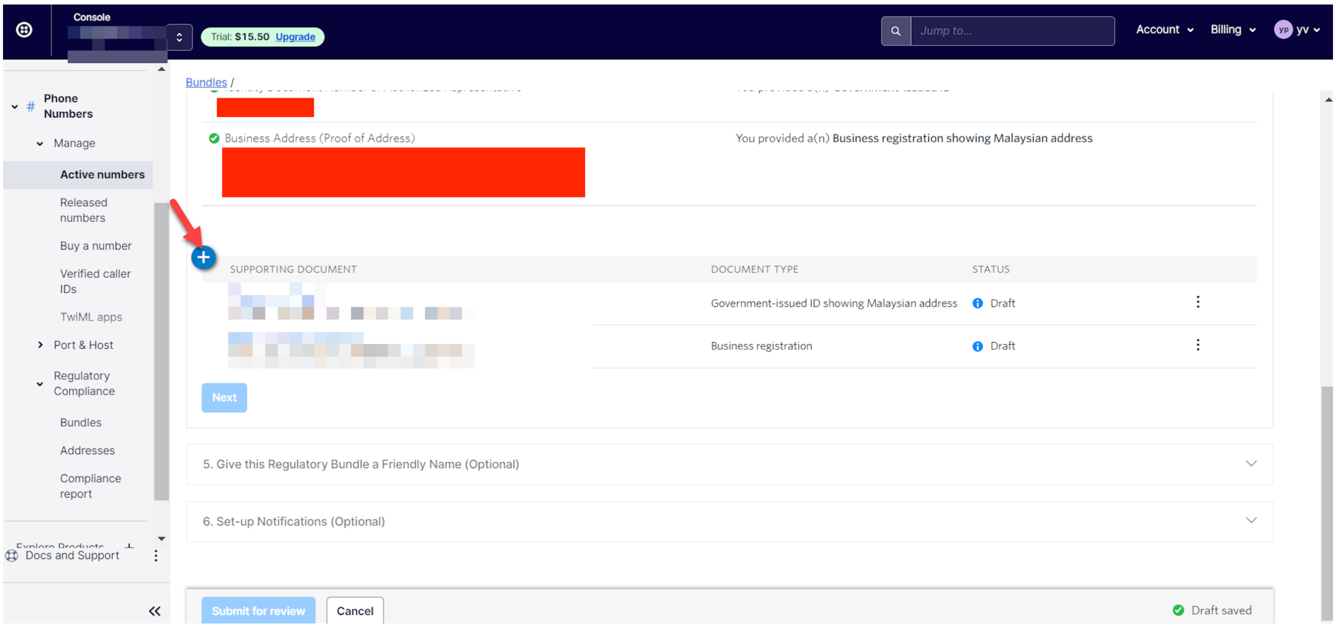
Please upload the Malaysian identity card document.



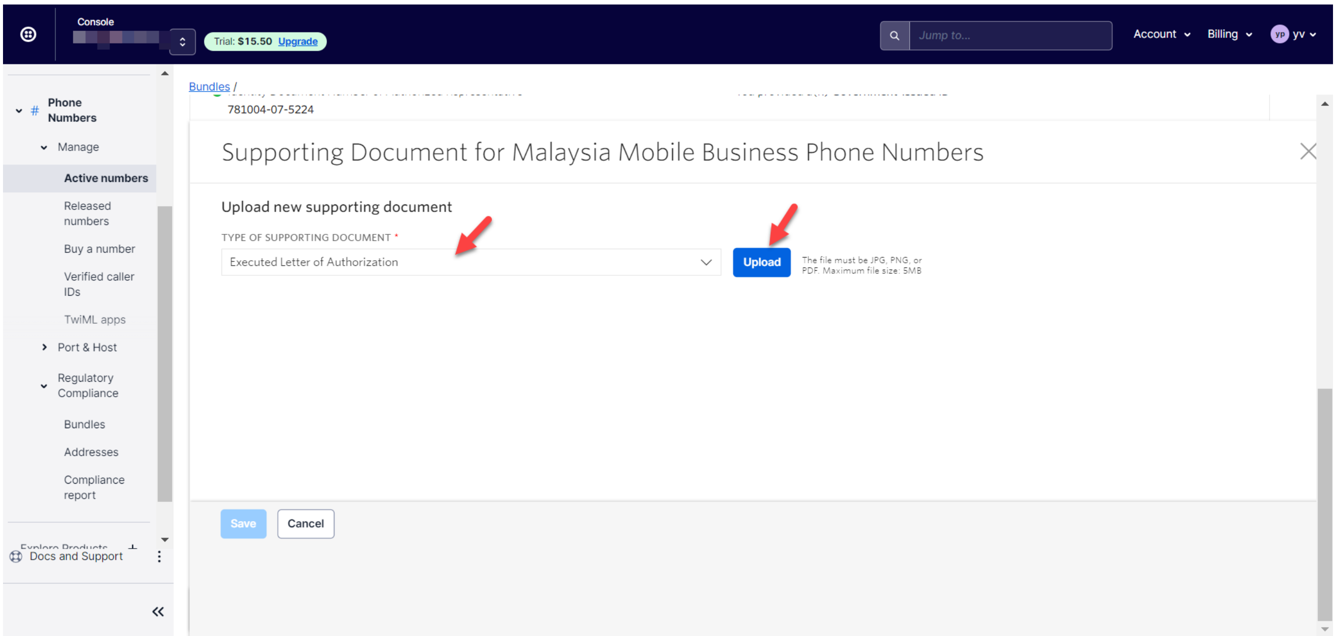
Please fill in the details based on the uploaded identity card document.



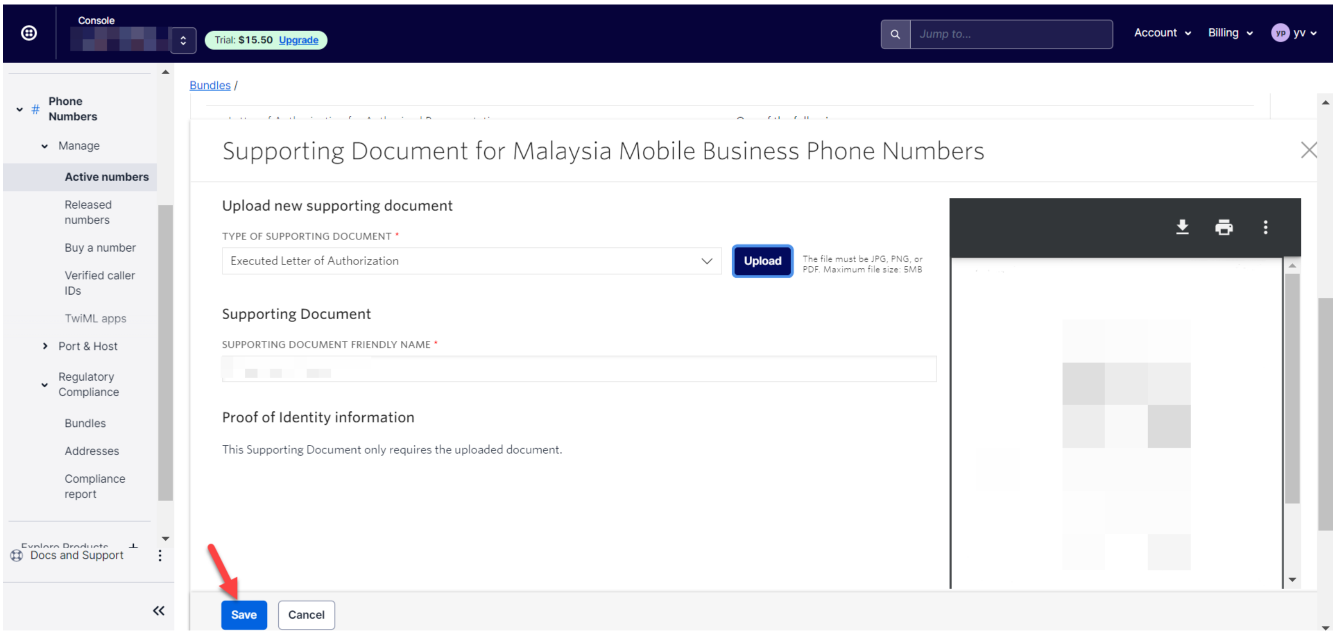
Please fill in the details based on the uploaded identity card document and click 'Save” to proceed.



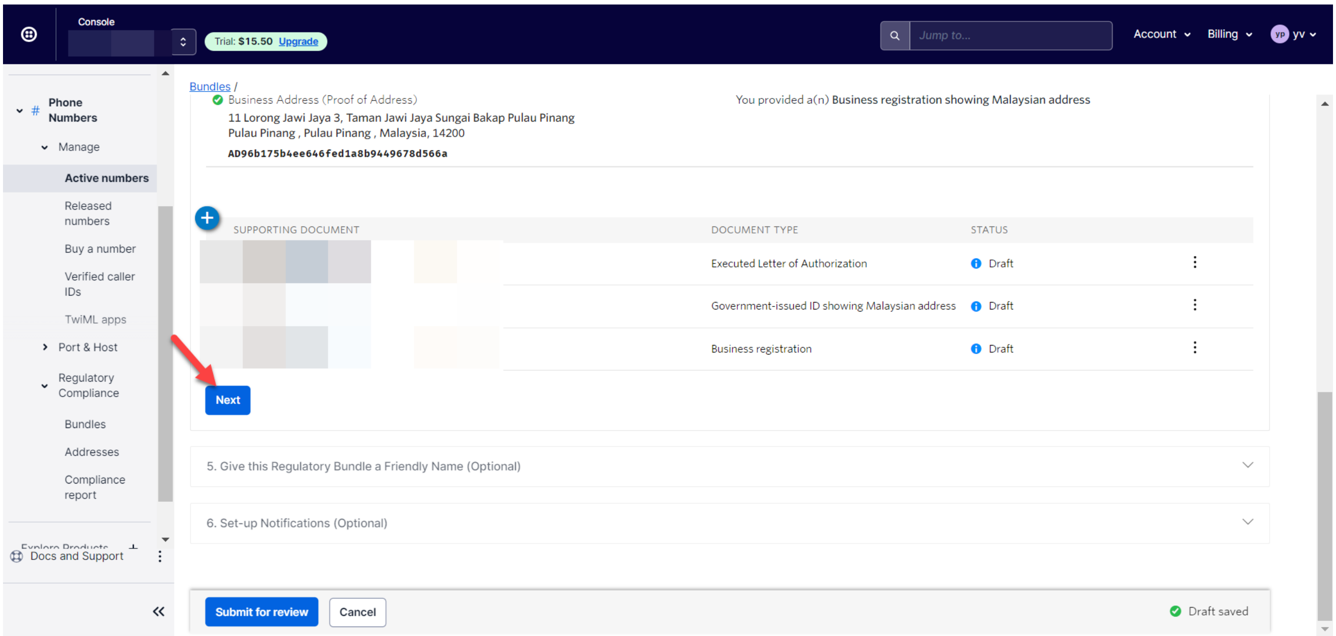
Next, please click “+” to add another supporting document.



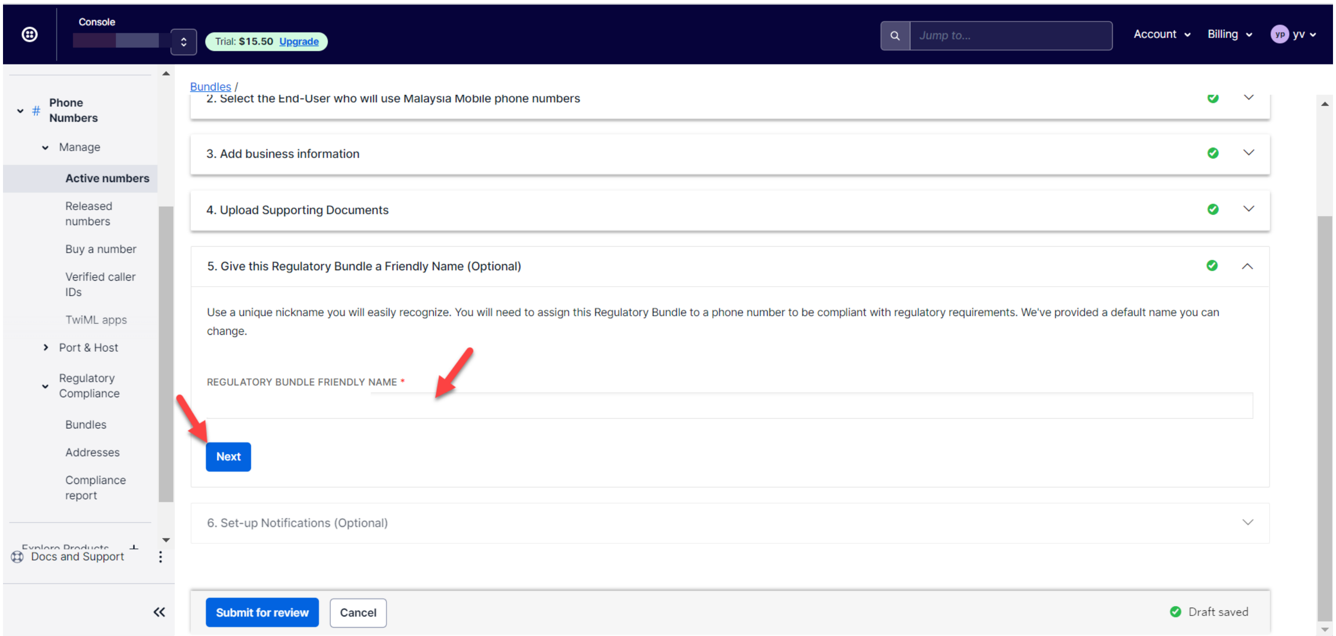
Please upload the letter of authorization. **The details of the authorized person in the letter should match with the uploaded identity document.**



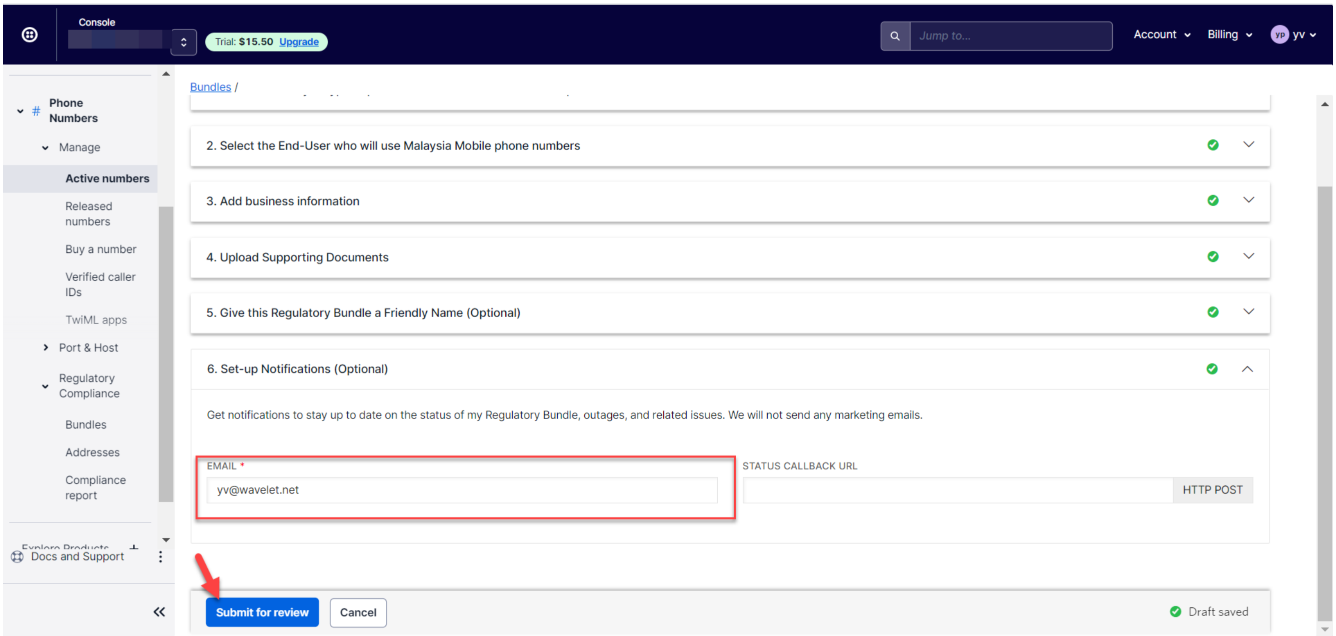
Please click “Save” to proceed.



Next, please click “Next” to proceed.



Please give this bundle a name.



Next, please provide your email. This is the email for Twilio support to contact you during the reviewing and approval process.

Section 5.0: Send a manual email request to Twilio for Malaysian phone number request after the section 2.0 and 3.0 is done

5.1 After the regulatory bundle is approved, the project manager will need to send a manual email request to support@twilio.com in order to request for a number.

Email example for your reference:

Dear Twilio Support,

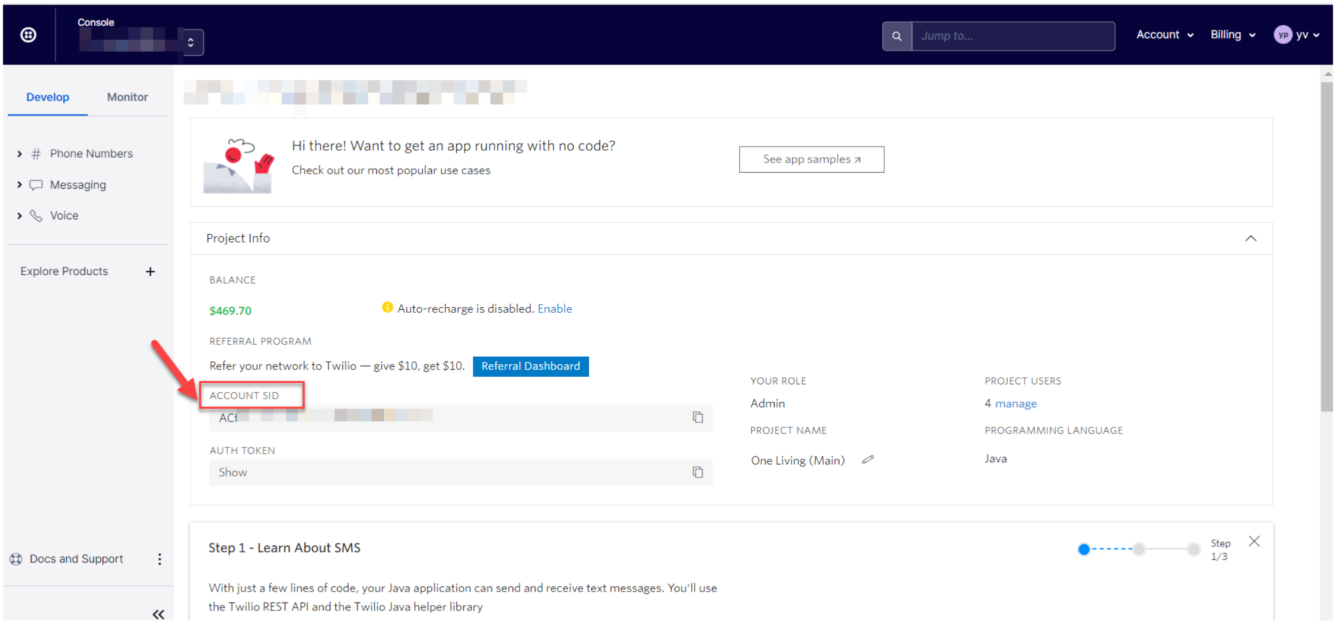
We would like to request one Malaysian mobile number with SMS capabilities because this request cannot be done via the console, hence the manual request.

Please find the information below to proceed with the request.

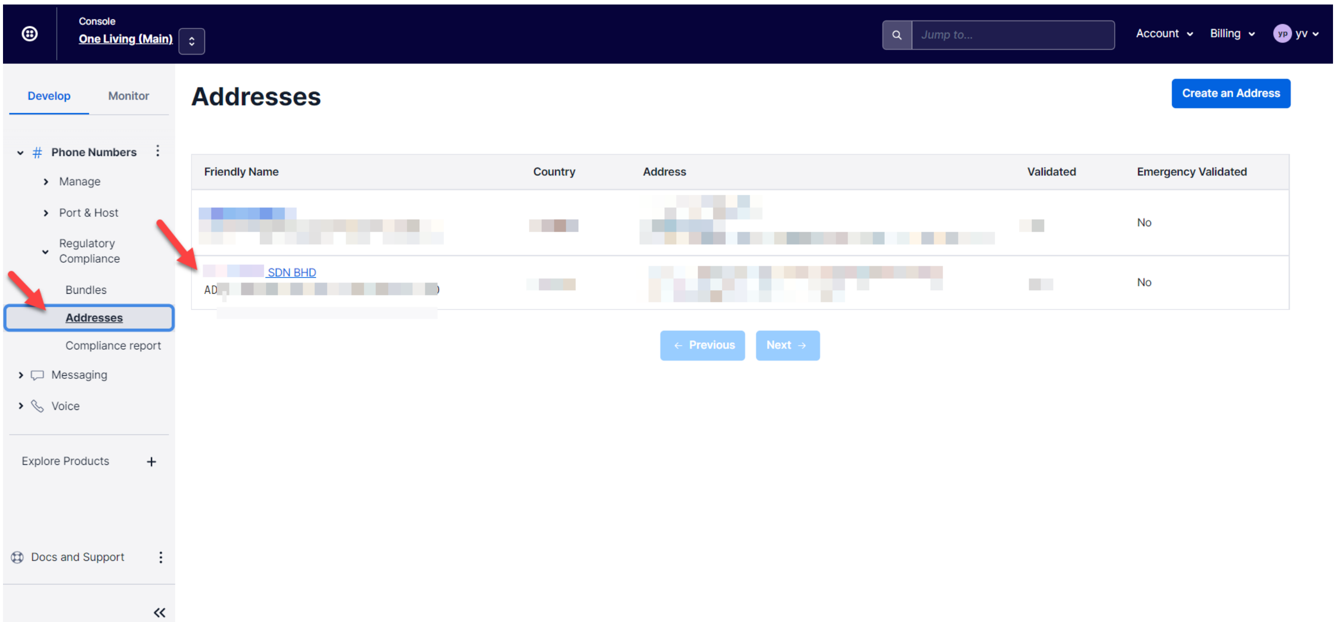
Account Name: ABCDE Sdn Bhd Account SID: ACxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx Address SID: ASxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx Bundle SID: BUxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx

Thank you.

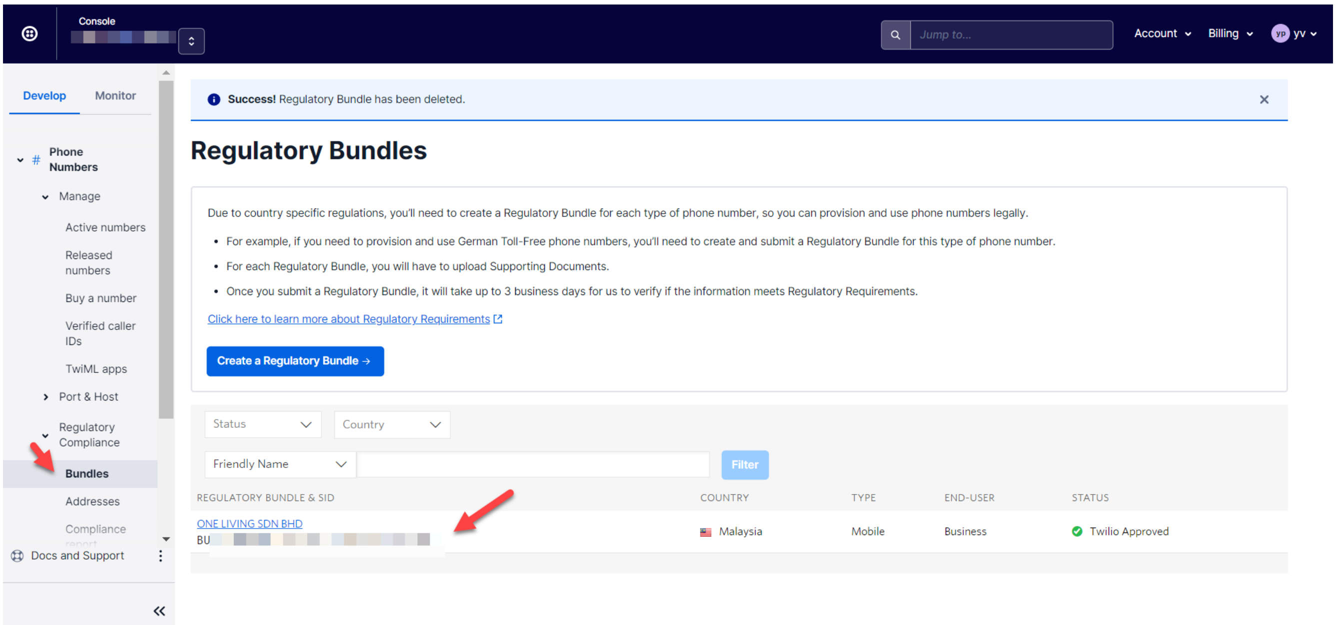
5.2 For the Account, Address and Bundle SID, you can find them by referring to the screenshot below.



You may find “Account SID” information in the Twilio console.



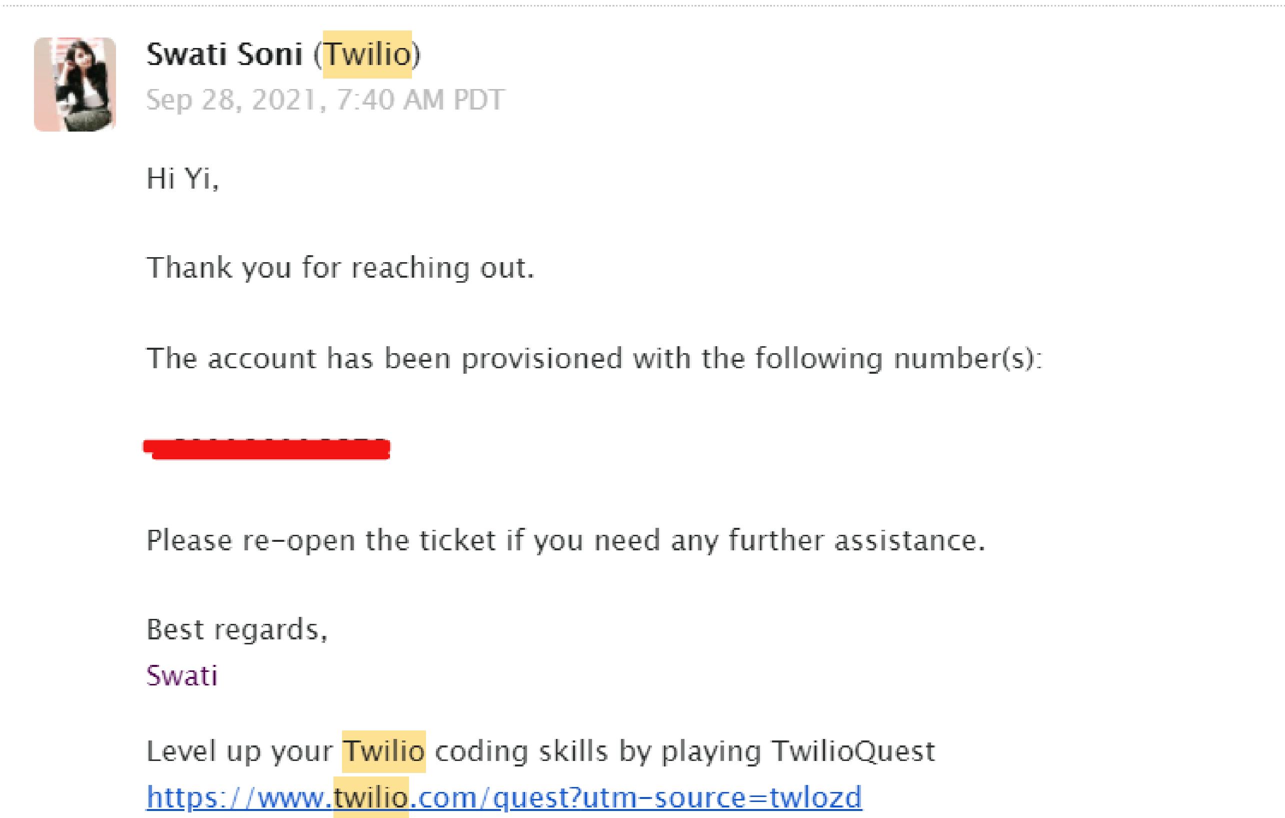
You may locate the “Address SID” information in the Twilio console. Please use the company address SID. (Phone Numbers> Addresses)



You may find the "Bundle SID" information in the Twilio console. (Phone Number > Regulatory Compliance > Bundles)

5.3 Twilio Support may send you an email and notify you on the number provision in your account. Otherwise the project manager can login to the console to check if the number has been provided. (Phone number > manage > Active Numbers)

5.4 Project manager needs to notify Lina (UCC technical programmer) on the provided number so that Lina can proceed with the integration.



Swati Soni (Twilio)
Sep 28, 2021, 7:40 AM PDT

Hi Yi,

Thank you for reaching out.

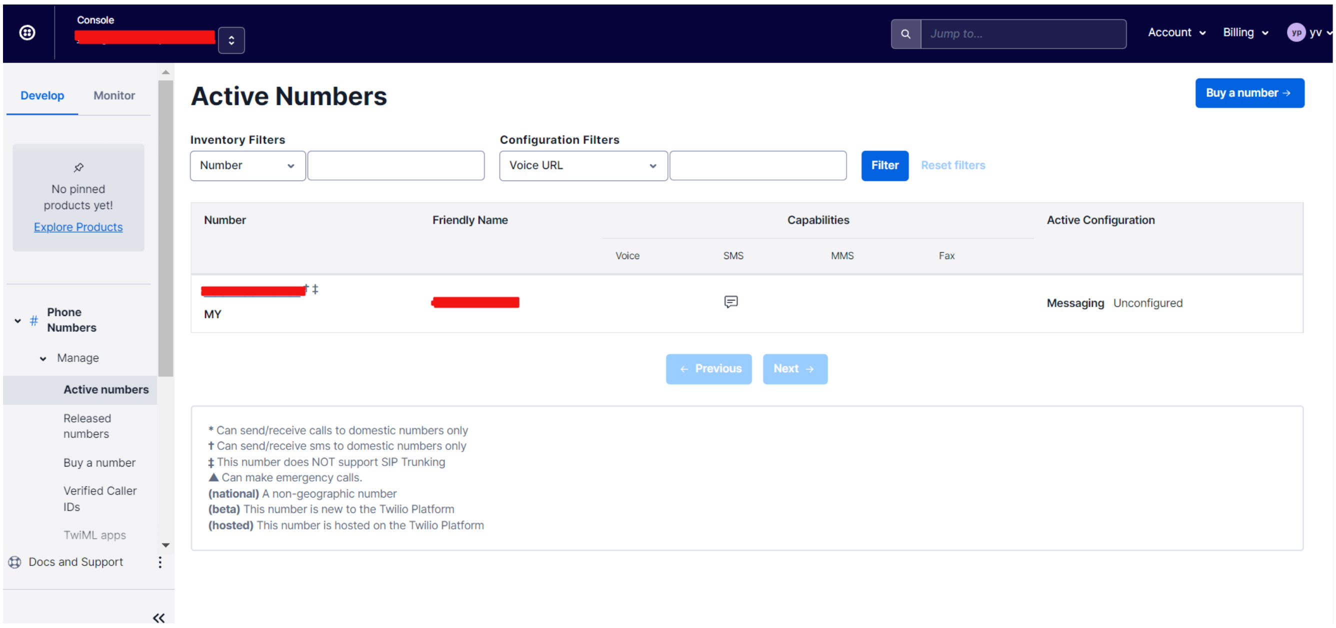
The account has been provisioned with the following number(s):

[redacted]

Please re-open the ticket if you need any further assistance.

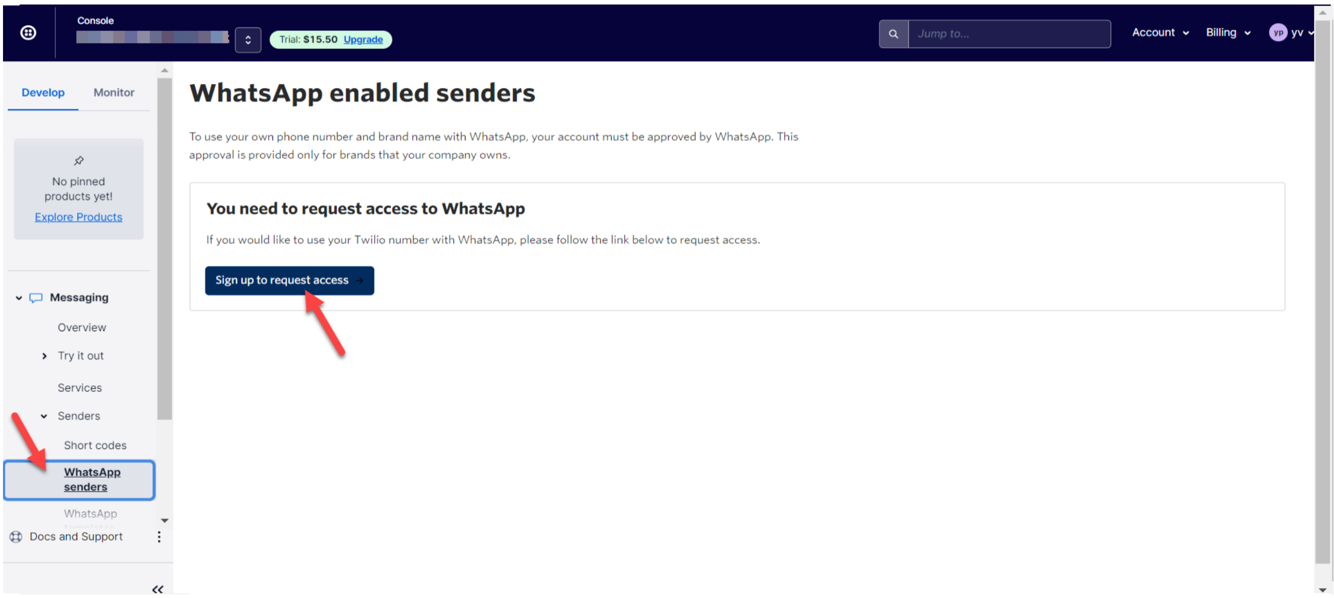
Best regards,
Swati

Level up your Twilio coding skills by playing TwilioQuest
https://www.twilio.com/quest?utm-source=twlozd



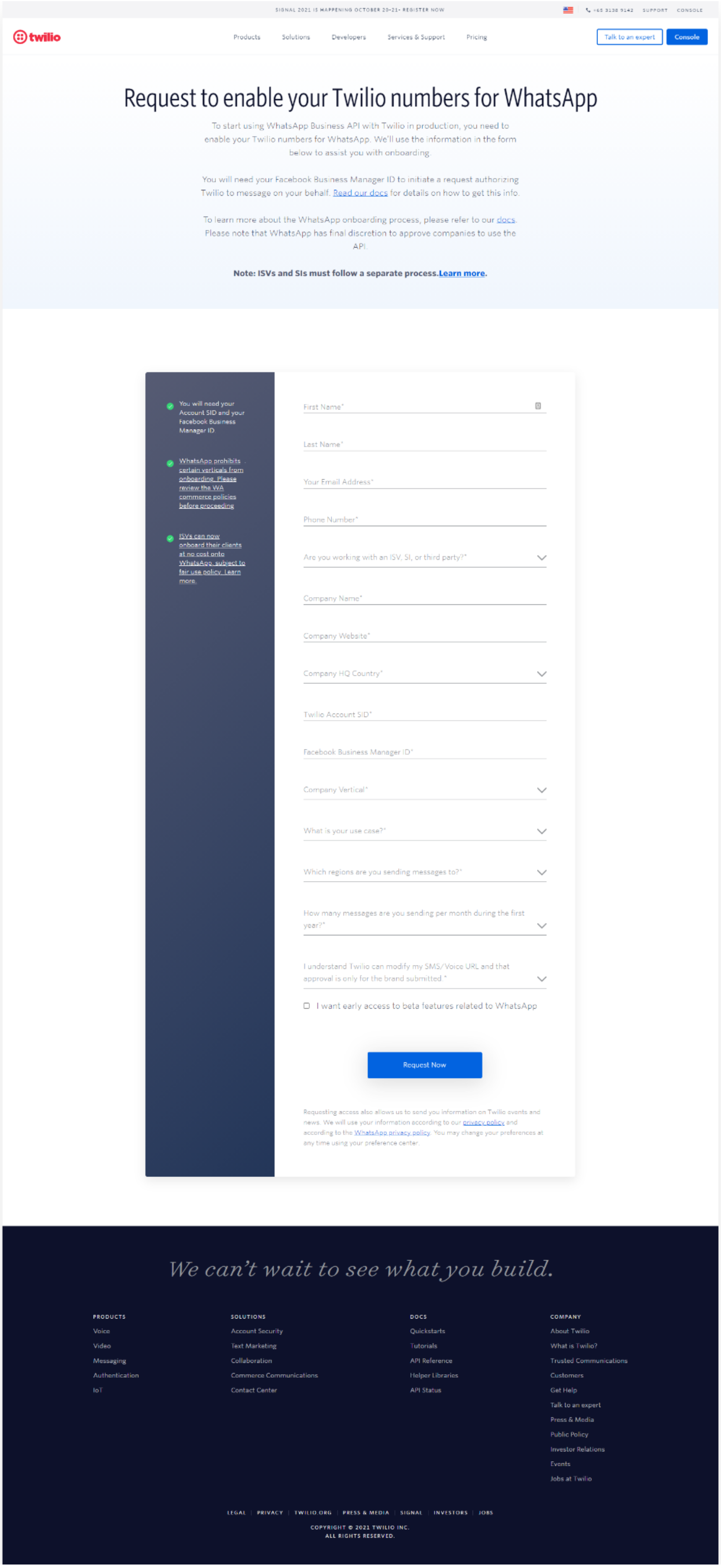
Section 6.0: Sign up to request access for Whatsapp enabled Sender in the Twilio Console

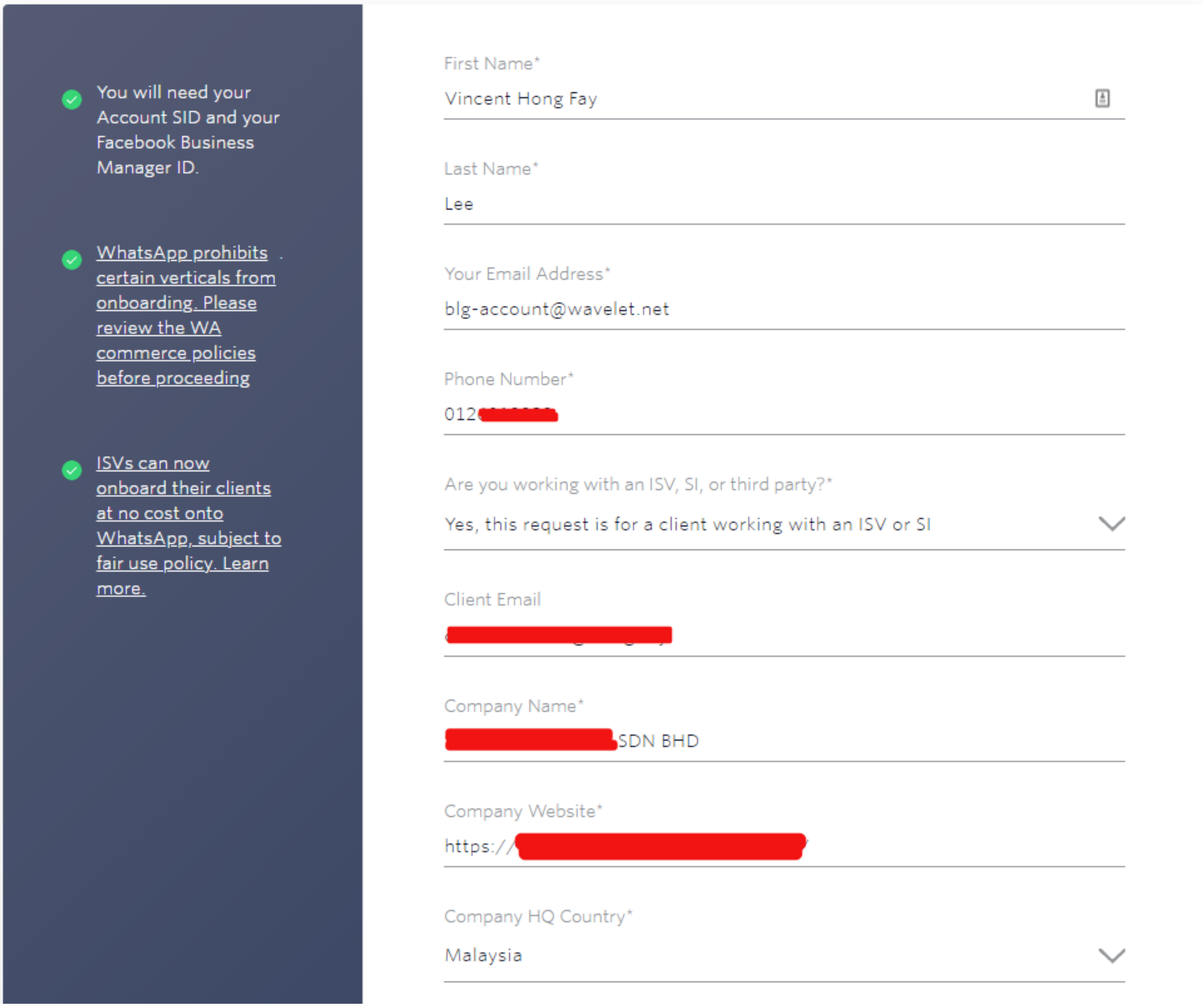
6.1 The project manager will submit the access request on behalf of the client, to [Whatsapp enabled senders] in the Twilio Console.

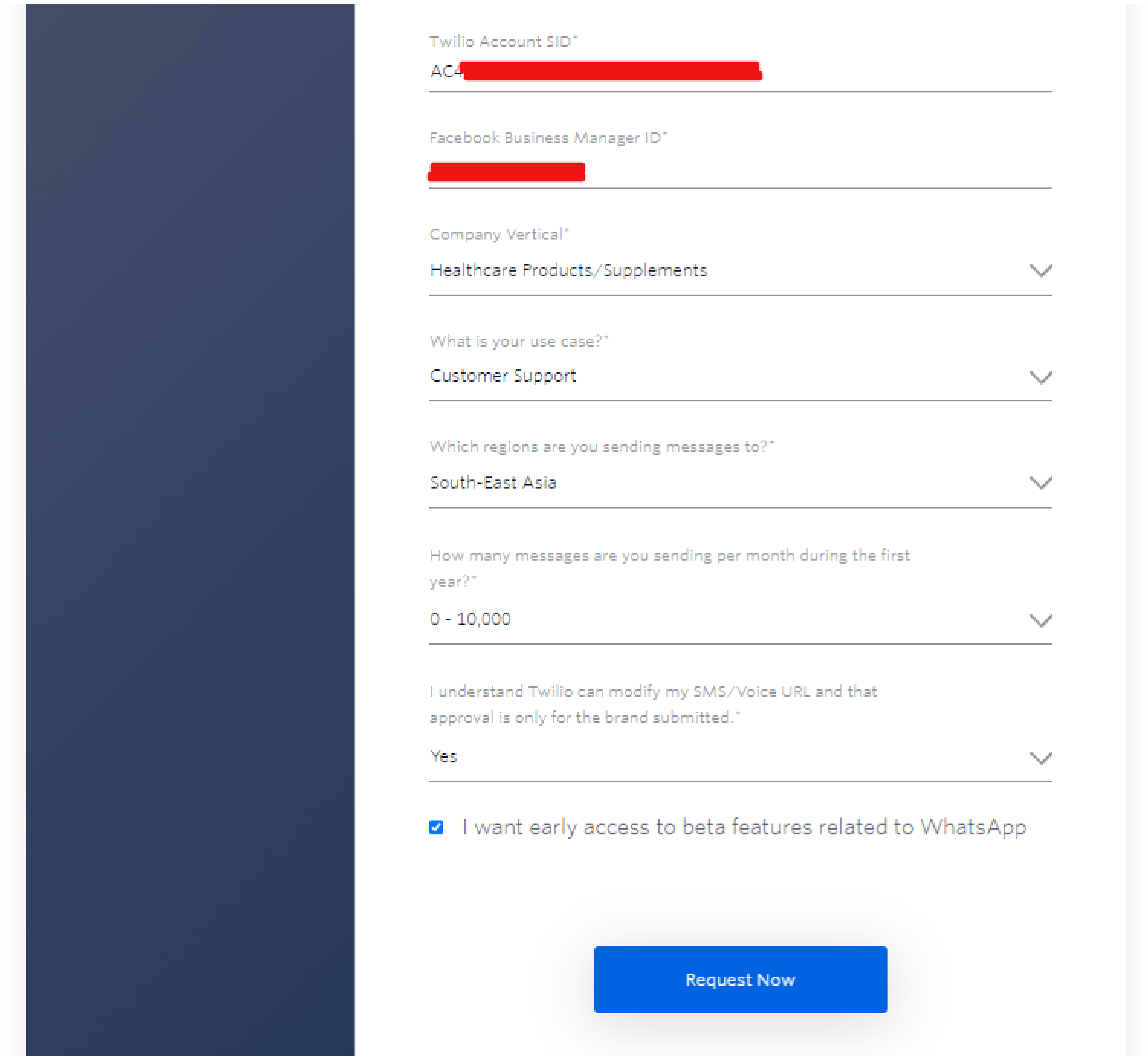


6.2 It will be redirected to the page below for the project manager to fill in the request form.

Please refer to the guide here and fill in accordingly. https://support.twilio.com/hc/en-us/articles 360039305933-Integrating-WhatsApp-with-Independent-Software-Vendors-ISV-and-System-Integrators-SI-


SIGNAL 2021 IS HAPPENING OCTOBER 20-21- REGISTER NOW
+65 3138 9142
SUPPORT
CONSOLE
twilio
Products
Solutions
Developers
Services & Support
Pricing
Talk to an expert
Console
Request to enable your Twilio numbers for WhatsApp
To start using WhatsApp Business API with Twilio in production, you need to enable your Twilio numbers for WhatsApp. We'll use the information in the form below to assist you with onboarding.
You will need your Facebook Business Manager ID to initiate a request authorizing Twilio to message on your behalf. Read our docs for details on how to get this info.
To learn more about the WhatsApp onboarding process, please refer to our docs. Please note that WhatsApp has final discretion to approve companies to use the API.
Note: ISVs and SIs must follow a separate process.Learn more.
You will need your Account SID and your Facebook Business Manager ID
WhatsApp prohibits certain verticals from onboarding. Please review the WA commerce policies before proceeding
ISVs can now onboard their clients at no cost onto WhatsApp, subject to fair use policy. Learn more.
First Name*
Last Name*
Your Email Address*
Phone Number*
Are you working with an ISV, SI, or third party?*
Company Name*
Company Website*
Company HQ Country*
Twilio Account SID*
Facebook Business Manager ID*
Company Vertical*
What is your use case?*
Which regions are you sending messages to?*
How many messages are you sending per month during the first year?*
I understand Twilio can modify my SMS/Voice URL and that approval is only for the brand submitted.*
I want early access to beta features related to WhatsApp
Request Now
Requesting access also allows us to send you information on Twilio events and news. We will use your information according to our privacy policy and according to the WhatsApp privacy policy. You may change your preferences at any time using your preference center.
We can't wait to see what you build.
PRODUCTS
Voice
Video
Messaging
Authentication
IoT
SOLUTIONS
Account Security
Text Marketing
Collaboration
Commerce Communications
Contact Center
DOCS
Quickstarts
Tutorials
API Reference
Helper Libraries
API Status
COMPANY
About Twilio
What is Twilio?
Trusted Communications
Customers
Get Help
Talk to an expert
Press & Media
Public Policy
Investor Relations
Events
Jobs at Twilio
LEGAL | PRIVACY | TWILIO.ORG | PRESS & MEDIA | SIGNAL | INVESTORS | JOBS
COPYRIGHT © 2021 TWILIO INC.
ALL RIGHTS RESERVED.


You will need your Account SID and your Facebook Business Manager ID.
WhatsApp prohibits certain verticals from onboarding. Please review the WA commerce policies before proceeding
ISVs can now onboard their clients at no cost onto WhatsApp, subject to fair use policy. Learn more.
First Name*
Vincent Hong Fay
Last Name*
Lee
Your Email Address*
blg-account@wavelet.net
Phone Number*
012[redacted]
Are you working with an ISV, SI, or third party?*
Yes, this request is for a client working with an ISV or SI
Client Email
[redacted]
Company Name*
[redacted] SDN BHD
Company Website*
https://[redacted]
Company HQ Country*
Malaysia



6.3 Anything that is further required by the Twilio Support during the approval process, they will email you. You may refer to sample screenshot 6.3.1 and 6.3.2 below. Some of the processes to verify the Facebook Business Manager account, you may need to involve your client PIC to verify since we do not have access to the client company Facebook account.

We've received your form acknowledgement for the Twilio APIs for WhatsApp Requirements for ISVs and ISV Clients document and will be forwarding your company details to WhatsApp. This portion of the process will take approximately 7-14 business days. Once we hear back, we will touch base with you in regards to the next steps in the onboarding process.

***Please Note**: If you plan to implement WhatsApp for your own company at this time, you may do so by following the steps provided below under, "Guidance For ISV/SIs to Onboard as a Direct."*

Again, thank you so much for your patience and we will keep you posted!

Guidance For ISV/SIs to Onboard as a Direct:
ISV/SIs are welcome to proceed with direct onboarding for their own business needs by following the steps outlined below:

(1) Approve Twilio on Facebook Business Manager.

- What? Go to FB Business Manager Settings > Received (click here) and "Approve" Twilio to message on your behalf.
- How long? Less than one minute.
- Why? Give Twilio permission to set up your account to use WhatsApp via the Twilio APIs.

(2) Verify your Facebook Business Manager account.

- What? Go to FB Business Manager Settings > Security Center (click here) and click to start Business Verification.
- How long? 5-10 mins to complete, 7-14 business days for Facebook to review.
- Why? Facebook requires all companies to verify their identity in order to maintain a healthy WhatsApp ecosystem.

(3) Submit a sender profile in Twilio Console.

- Go to Twilio Console > Programmable Messaging > Senders > WhatsApp Senders and submit a sender profile. If you have a trial account, you will need to upgrade at this time.

We are reaching out to you in regards to the next steps to begin ISV/SI WhatsApp onboarding for your clients.

WhatsApp has now completed the review of your company and has provided next steps (below) to begin onboarding your clients with Twilio. This process officially recognizes your company as an approved ISV and allows you to begin business with WhatsApp.

What do you need to do?
To begin onboarding, WA requires actions from ISVs and all end clients.

ISV Actions
The following steps must be done once by your company (ISV).

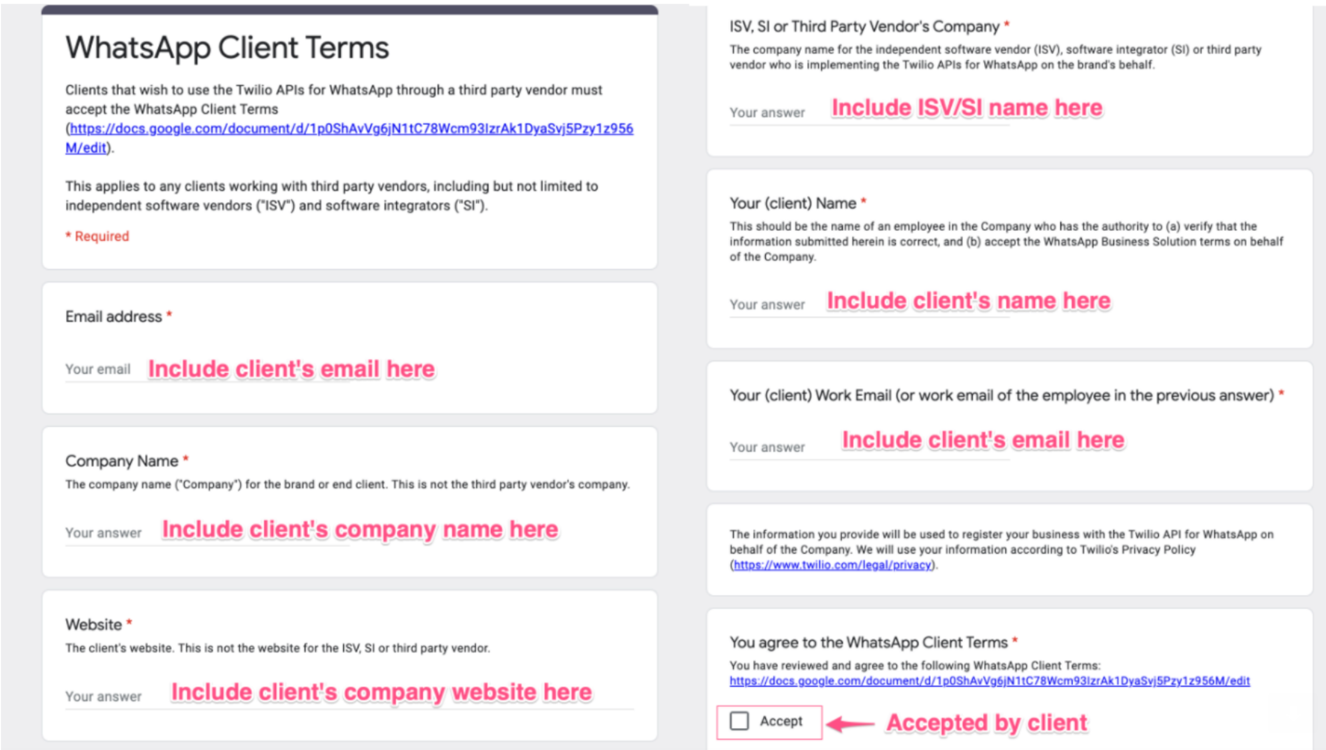
1. **ISV**: Execute the WhatsApp ISV Terms - Twilio will be sending you a Docusign after you receive this email with new ISV Terms as required by WA. You can reassign the Docusign to the appropriate contact if needed.

End Client Actions
Each of your new end clients is required to accept the new WhatsApp Client Terms.

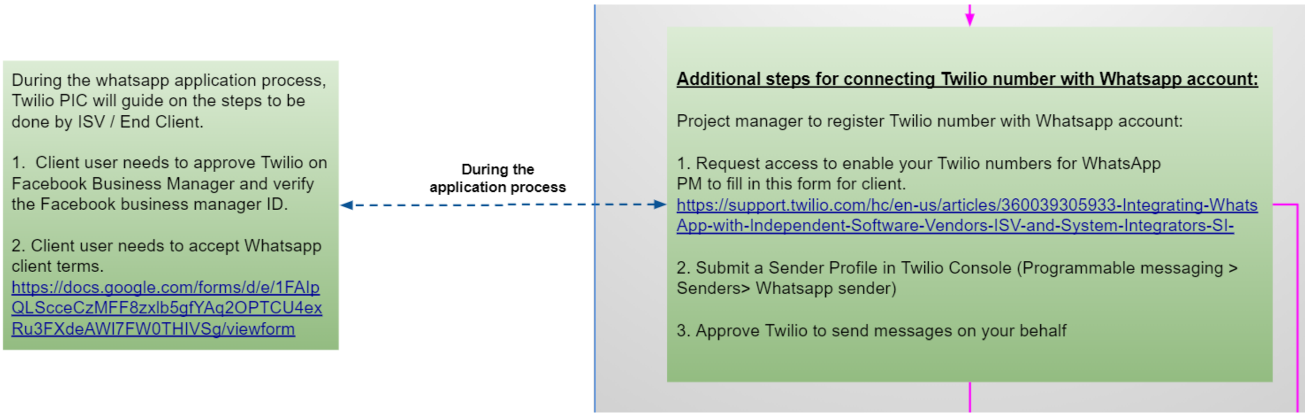
1. **End client**: Clients that wish to use the Twilio APIs for WhatsApp through an ISV/SI must accept the WhatsApp Client Terms (***Please see attached***). Please ensure that your client reviews the attached document and confirms their acknowledgement here: WhatsApp Client Terms - Confirm Acknowledgement.

We recommend that you complete all action items within 2 weeks of receiving this email. The sooner you complete these steps, the sooner we will be able to proceed with onboarding. Once completed, Twilio will send out a confirmation email stating that your business is ready to begin ISV/SI onboarding.

6.4 Please get client PIC to fill in the Whatsapp Client Terms below as well. WhatsApp Client Terms



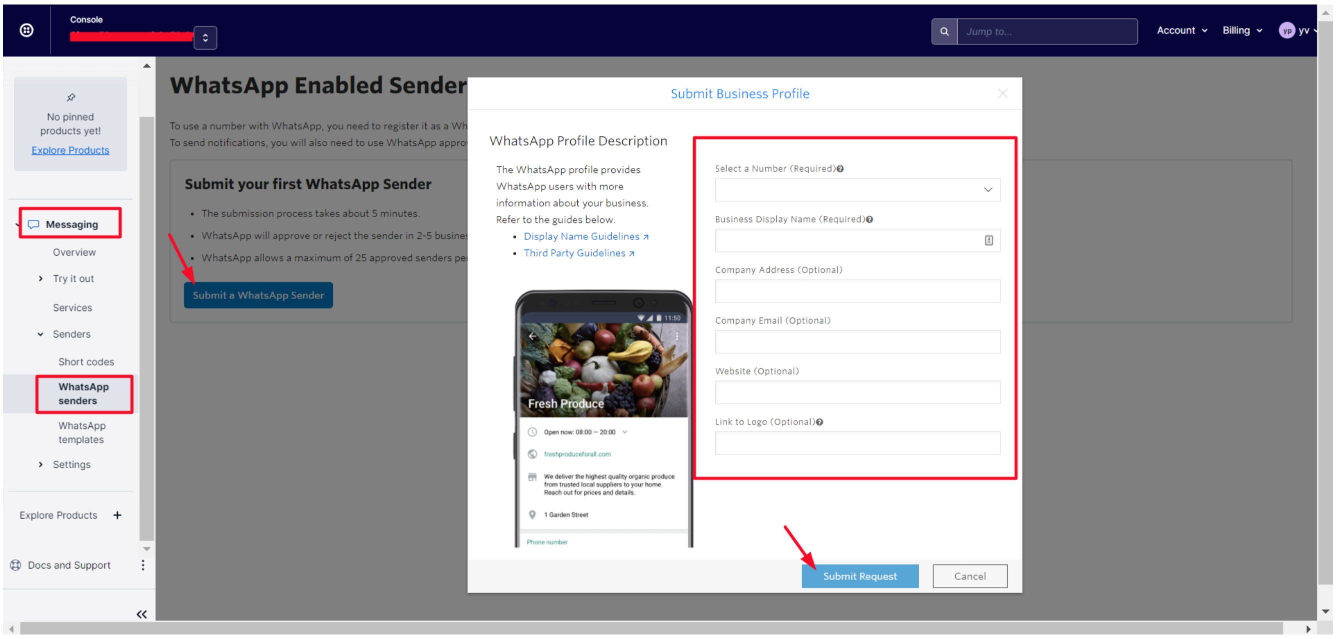
6.5 The above processes might be taking 1-3 months depends on the submitted information. (This is referring to these stages in the standard UCC implementation workflow below.)



UCC : Implementation Workflow (FB, Telegram, Whatsapp & SMS)

6.5 Next, in order to use the allocated number with WhatsApp, we need to register it as a WhatsApp sender. Therefore, the project manager needs to “submit a WhatsApp Sender” and fill in the information and submit a request for the business. (Messaging > Whatsapp senders)

This is the guidelines for setting display names for the business. Display Names - WhatsApp Business Platform - Documentation - Facebook for Developers Project manager can send this guideline to client PIC to determine the “Business Display Name” before submitting such request.

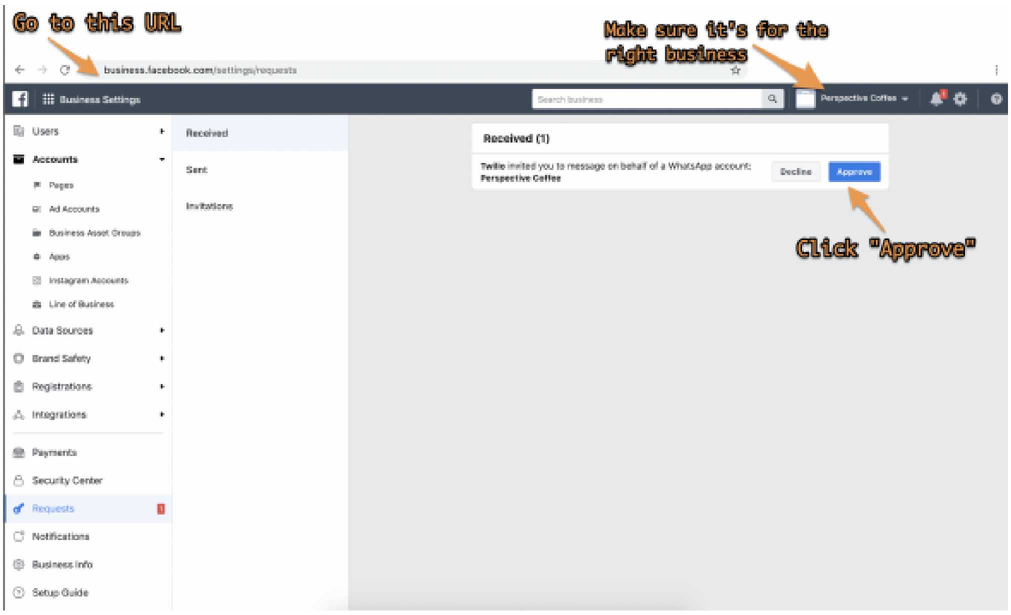


6.6 PM will receive a follow-up email from Twilio for the steps guide to approve the Facebook Business Manager. PM can send this guide to client PIC to proceed with the verification. After this PM to reply Twilio support to proceed further after the verification.

Thank you for submitting your sender profile request!

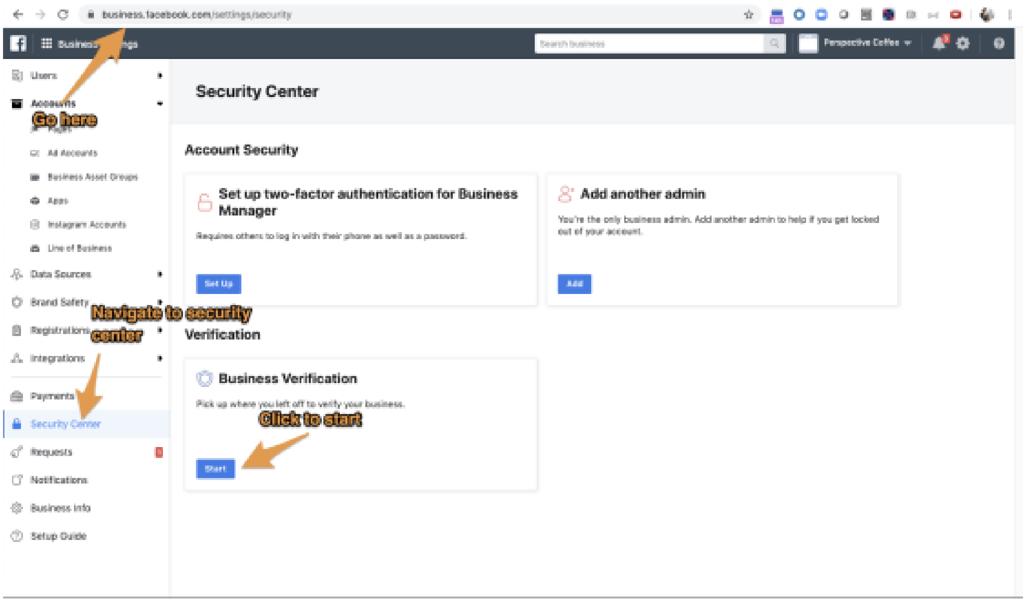
To proceed with registration, please follow the steps below in your Facebook Business Manager (FB BM) '[redacted] **This MUST be the FB BM for company '[redacted](or affiliate).**
***Note: If this FB BM is not the company nor related to the company, your display name may be rejected due to lack of association with the company.**

1. **Click "Approve" in Facebook Business Manager** (see image below)
    - Go to your Facebook Business Manager account here
    - Verify it is the right business account
    - Approve the request - This is to ensure to give Twilio permission to set up your WhatsApp Business Account.



2. **Verify your FB Business Manager account** (see image below)
    - Click this link to start verification
    - Facebook needs to verify your business identity.

- It takes ~ 5-15 mins to complete verification and up to 7-14 business days for Facebook to review



- ***Note:*** If you're unable to find your business on step 2 of Facebook business verification, you may be asked to upload official documents to prove you have a registered business. Please view this link for more information.

- ***Disclaimer:*** Please note that all decisions related to business verification and display name approvals are solely controlled by Facebook and we have limited visibility to their decisions. You may experience delays from Facebook that can take up to 15-30 days. Twilio will work actively with Facebook to resolve the delays on your behalf.

In addition, feel free to share with us the documents you have provided to Facebook for business verification. We can then review with Facebook if they have any questions about your submission.

6.7 After PM reply to the email for FB verification, it will be taking some time for Facebook to review the process as stated in the email sample below.

Thank you for your interest in the Twilio API for WhatsApp!

Facebook is currently reviewing the business verification portion of the process. This will take approx. 7-14 business days. **Please be sure to check your Facebook Business Manager for any additional information that Facebook may need on your end to complete their review.**

Please Note: Facebook must be able to verify your business before we can continue with the onboarding process. Once your business has been verified, the following will take place:

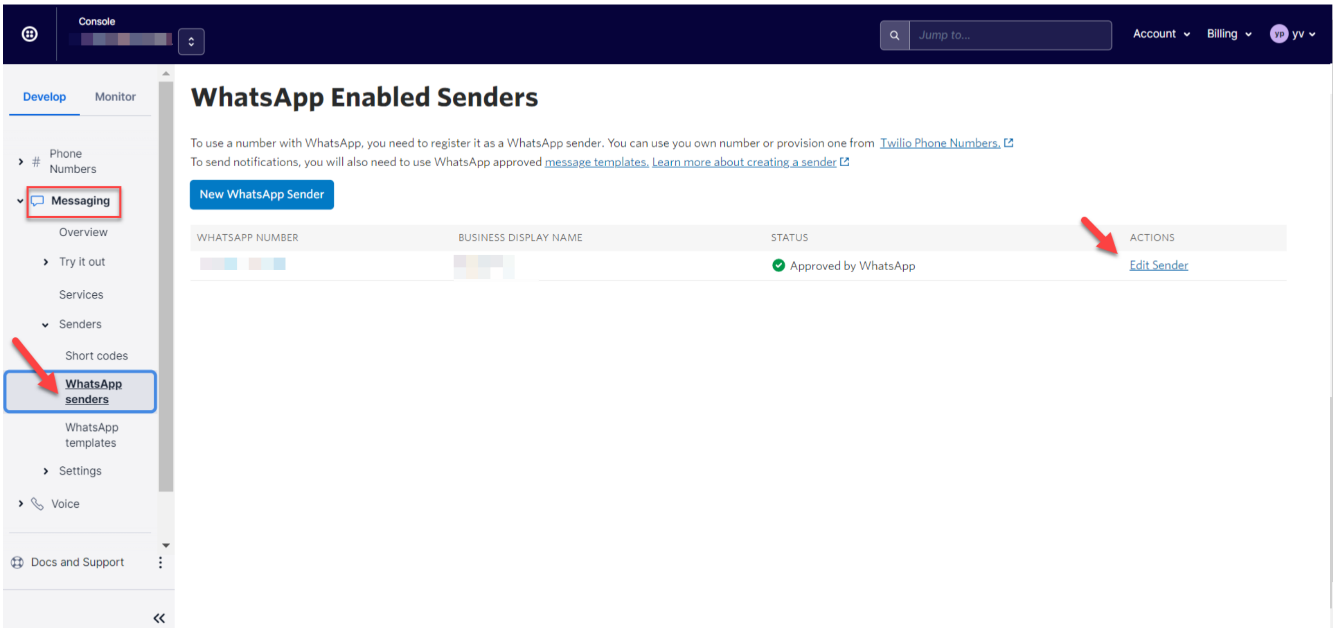
1. Facebook will review your overall WhatsApp Business Account. This will take approx. 1-2 business days.
2. Once Facebook approves your WhatsApp Business Account, your display name will be reviewed. This can take up to 1-3 business days.
3. Once your display name is approved, we will be able to successfully register your phone number!

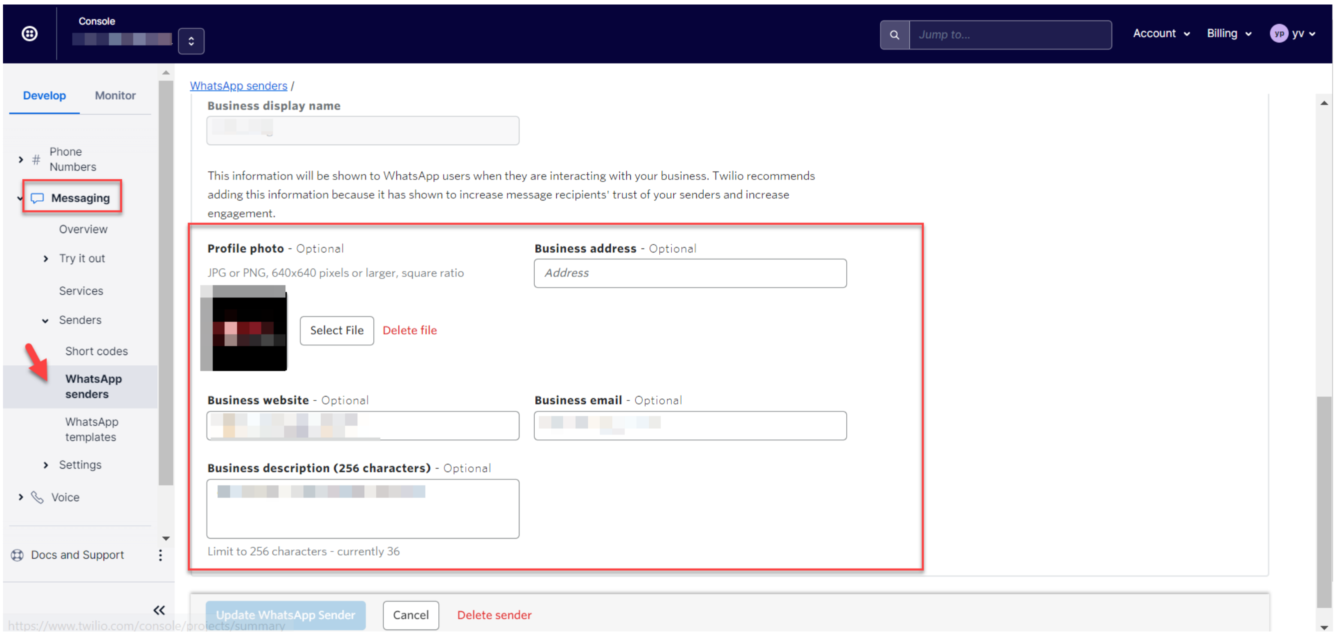
In addition, feel free to share with us the documents you have provided to Facebook for business verification. We can then review with Facebook if they have any questions about your submission.

Disclaimer: Please note that all decisions related to business verification and display name approvals are solely controlled by Facebook and we have limited visibility to their decisions. You may experience delays from Facebook that can take up to 15-30 days. Twilio will work actively with Facebook to resolve the delays on your behalf.

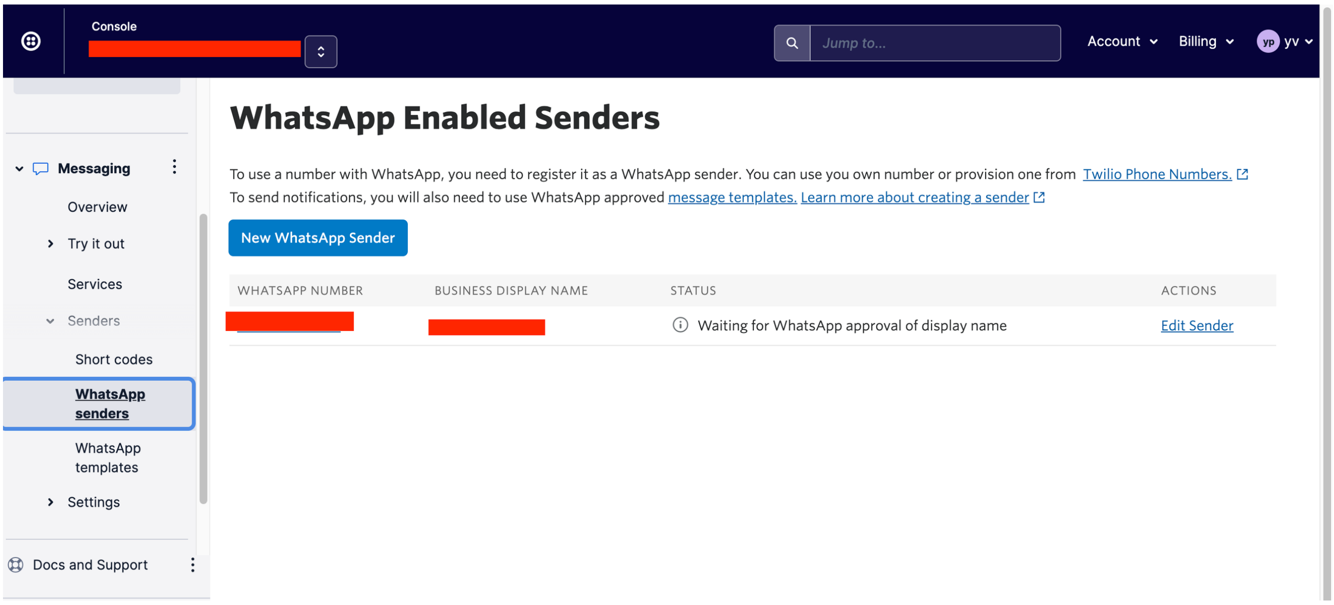
Please let us know if you have any questions or concerns. We appreciate your patience, and we look forward to getting you on your way to using Twilio API for WhatsApp!

6.7 Once everything is approved and ready, project manager is to guide client PIC to add or edit the sender, so that the client admin can always update the sender themselves in the future if required, from time to time.



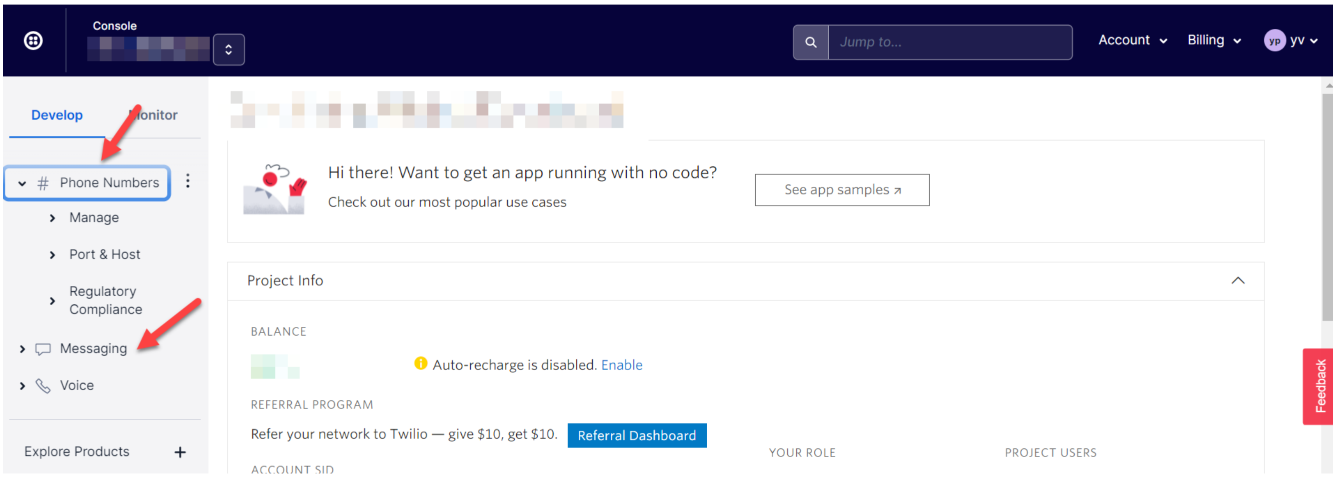


6.8 PM can login into console to check the status of the WhatsApp Enabled Senders as well.

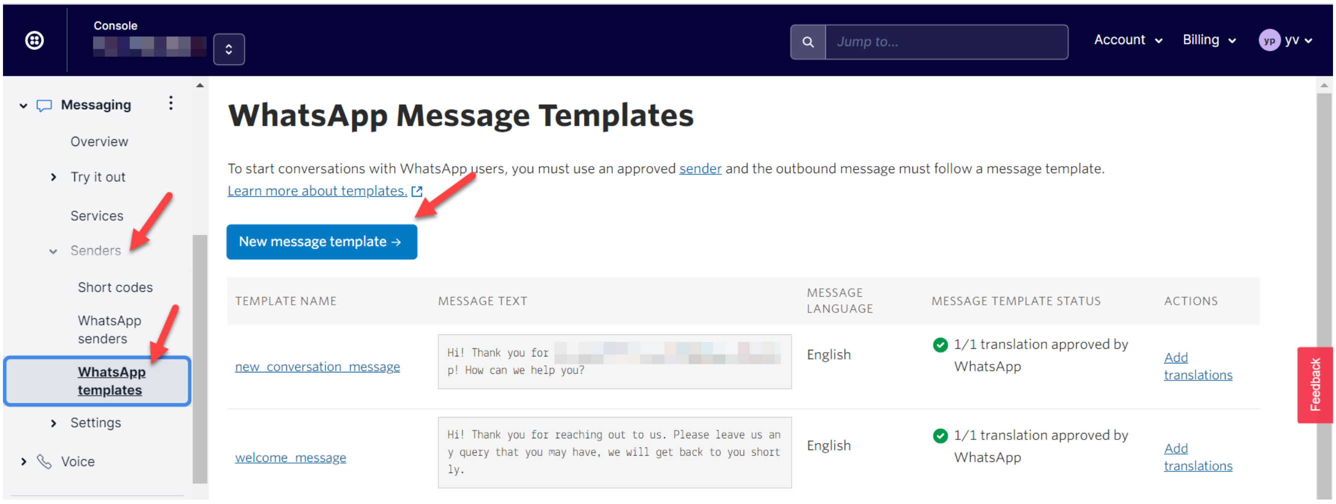


Section 7.0: PM to guide client admin user to submit the template message in the Twilio Console

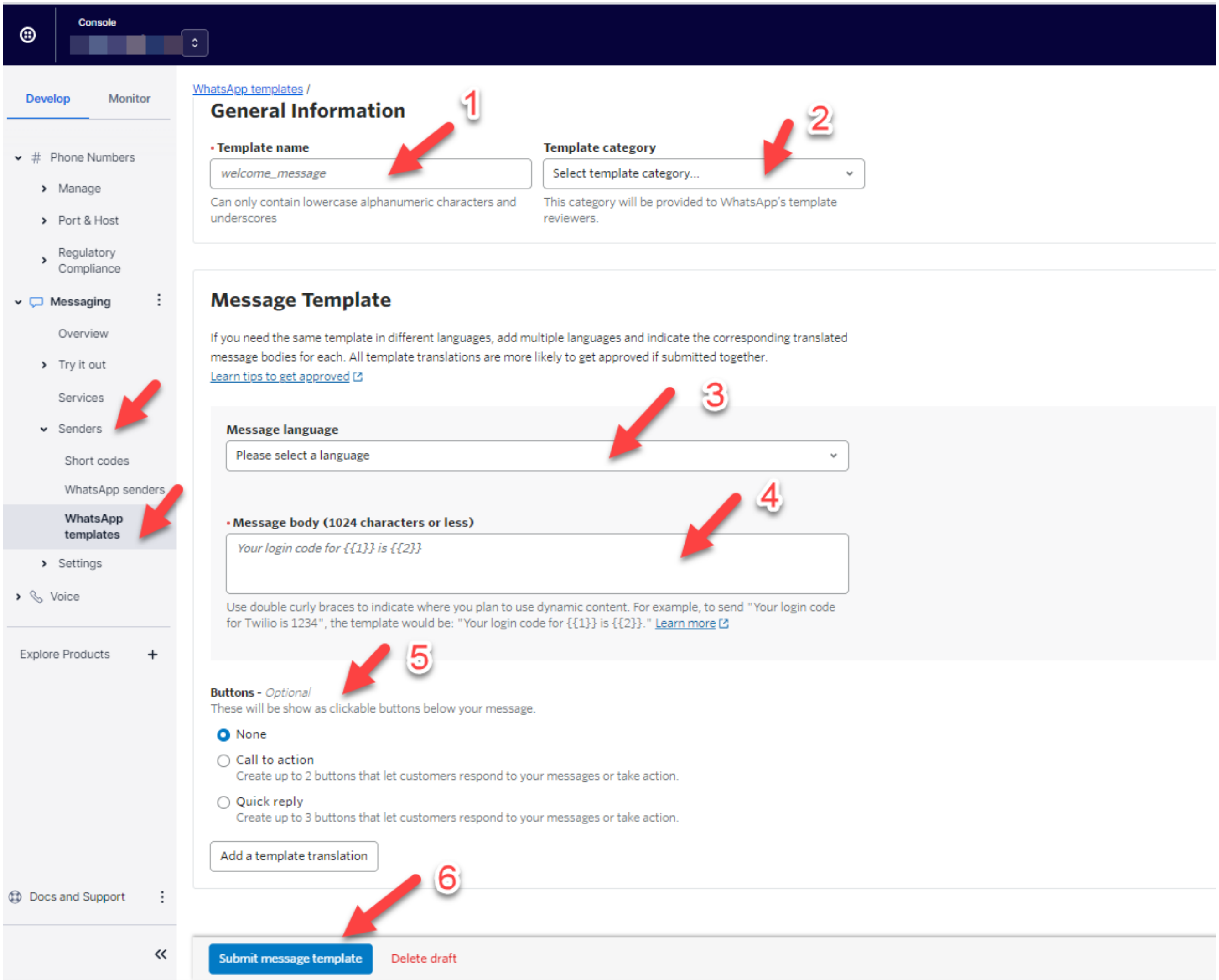
7.1 Once the mobile number is successfully requested and integrated with UCC in Akaun Shell , the project manager will guide the user to submit the template message and update the Whatsapp Sender in the Twilio Console.



Please go to Phone Number > Messaging



Please go to the Messaging > Senders > Whatsapp templates > New Message template.



Please fill in accordingly:

1. Please name the template message.
2. Please select a template category from the dropdown list.
3. Please select a language from the dropdown selection.
4. Please fill in the message body by following the given format.
5. This is optional according to your requirement.
6. Please click “Submit message template” to submit once it is filled up.

7.2 After the template message approved by Twilio Whatsapp, the client PIC needs to set up the same in the UCC > predefined message based on the approved message format and structure. (Please refer to the UCC user guide How to Setup UCC? (Admin access) part 4.0 for setting up the predefined message.)

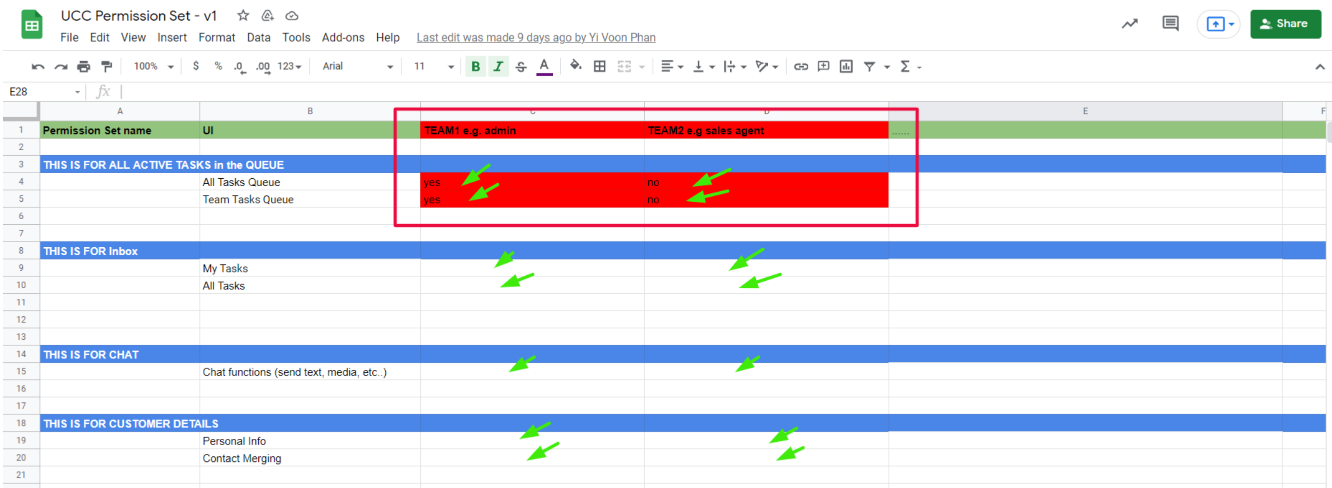
A.20.13. General Requirement

NOTE	PM to guide client user to fill in the permission settings spreadsheet

1- Kindly refer to the attached spreadsheet for permission settings. Project manager to guide the client PIC to fill in the spreadsheet based on the examples given in the file. Once this is ready, the permission is to be set in UCC production Akaun Shell accordingly.

https://docs.google.com/spreadsheets/d/1fNcMzxGs7EvW25I0Fv-GaOGkckxbzRG74lGhYjsFFdA/edit#gid=1265538255 - Connect to preview

2- Please refer to the red highlighted area for sample on how to fill up the permission spreadsheet. For example, in this case, the client might have admin team, sales agent team. The client could have more than this, for instance, branch manager team, repair & maintenance team, customer service team etc. For every team, the client need to fill in either “Yes” or “No” (as shown as the green arrow in screenshot below) to indicate whether the team should have or should not have access to the respective User Interface (UI) menu stated in the column B. [Yes = Can access, No = No access]



3- PM to request from client PIC for an email listing of the admin users and agents. PM to guide them how to sign up via Akaun Shell and verify their login via email. Once this is done, PM to get Lina / tech team to provide the necessary permission for admin users to do the UCC setup in the production environment.

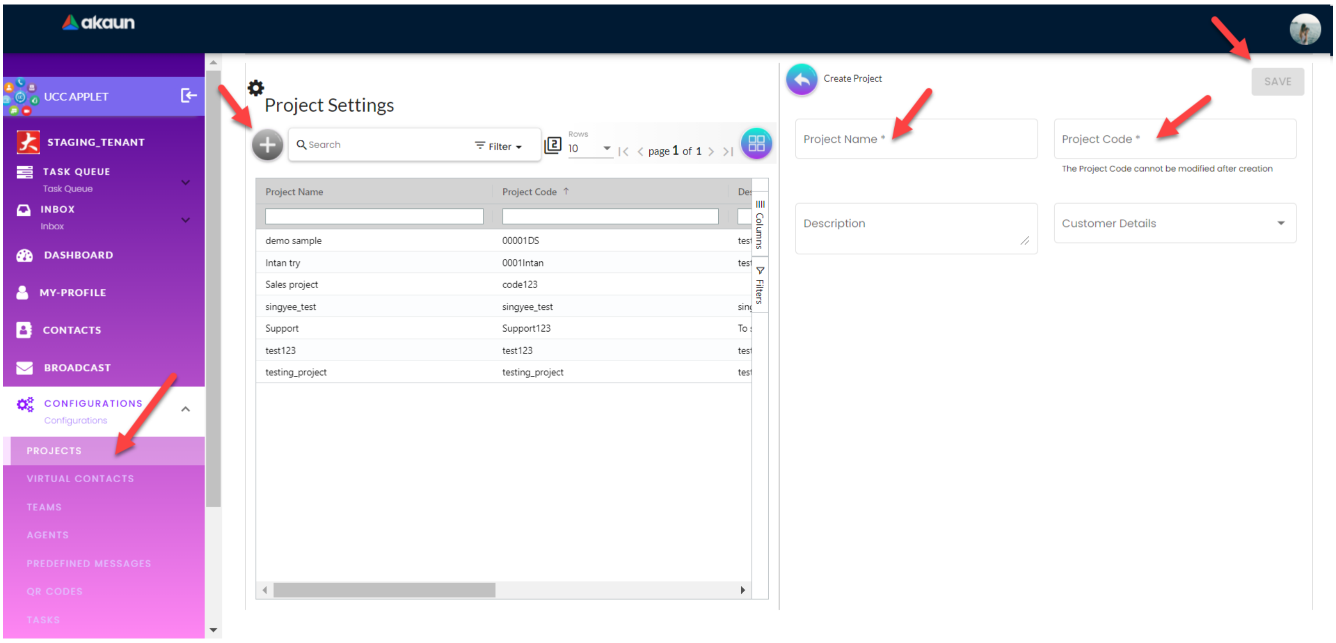
NOTE	once Lina completes the permission template implementation in UCC applet, then the above section 3 is not required anymore as client PIC/admin users can do the permission assignment from their side. Please always follow up with Lina for the latest update on this permission part beforehand.

A.20.14. Admin Access Setup

A.20.14.1. 1.0 Project Settings

1.1 The admin needs to create projects in the project setting by filling in all the necessary fields.

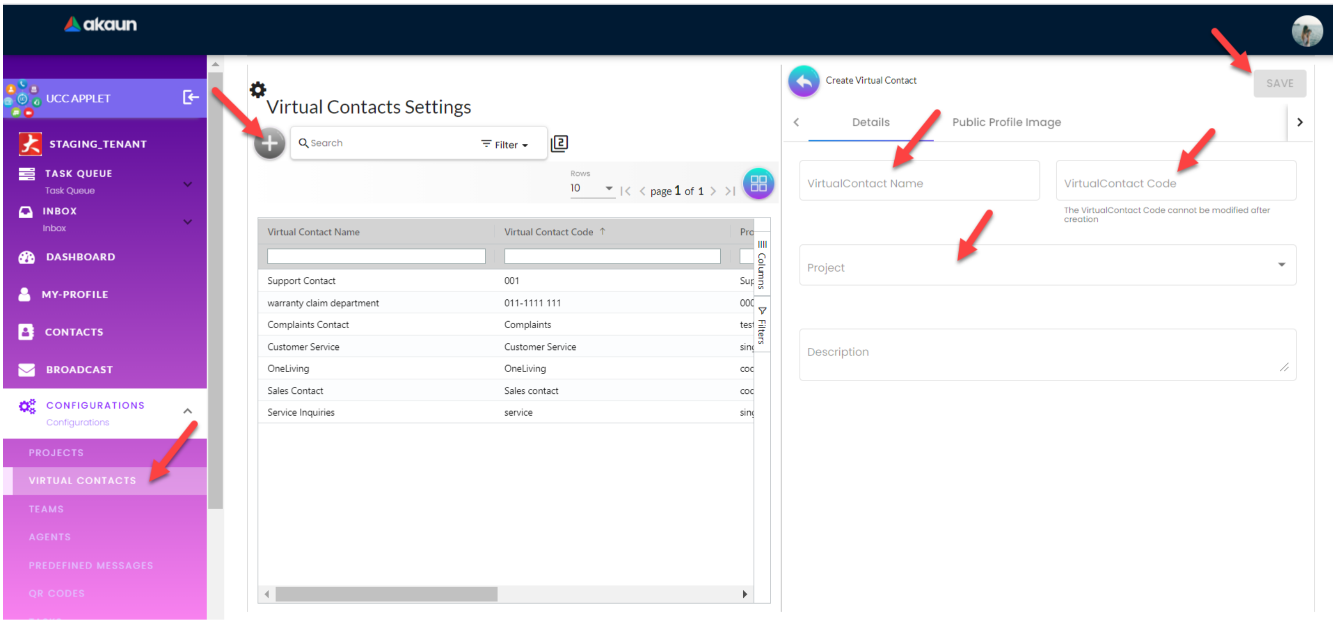
- Project Name*
- Project Code*
- Description
- Customer Details



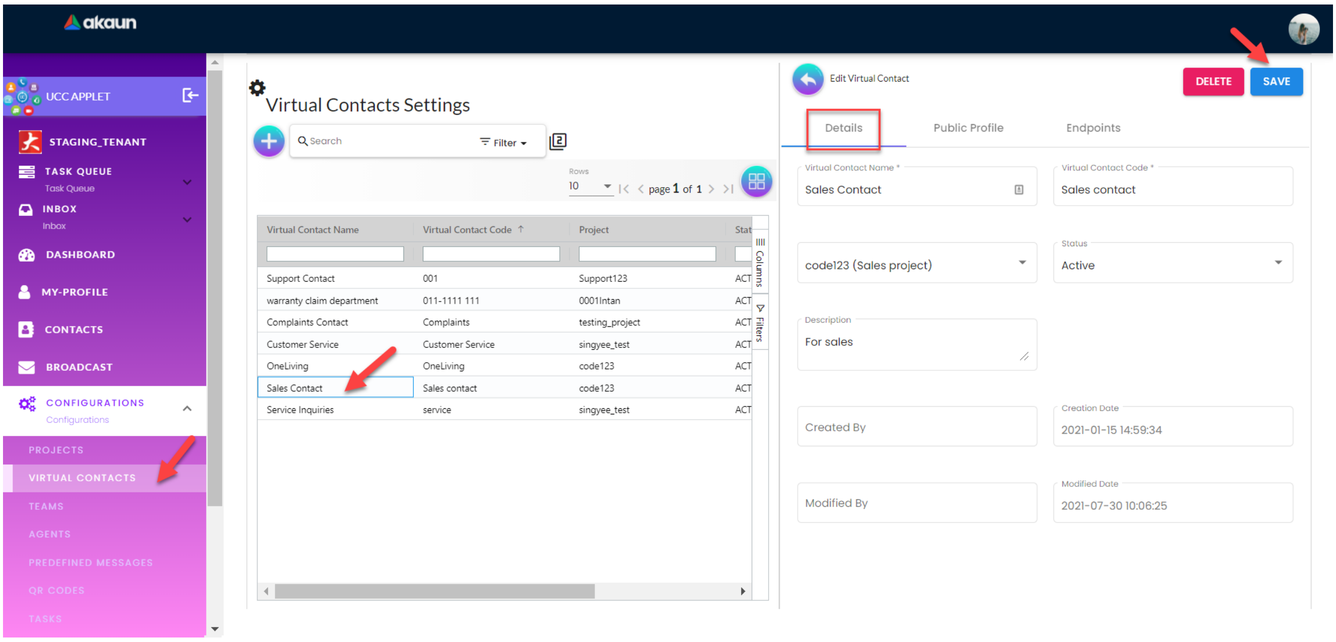
A.20.14.2. 2.0 Virtual Contacts Settings

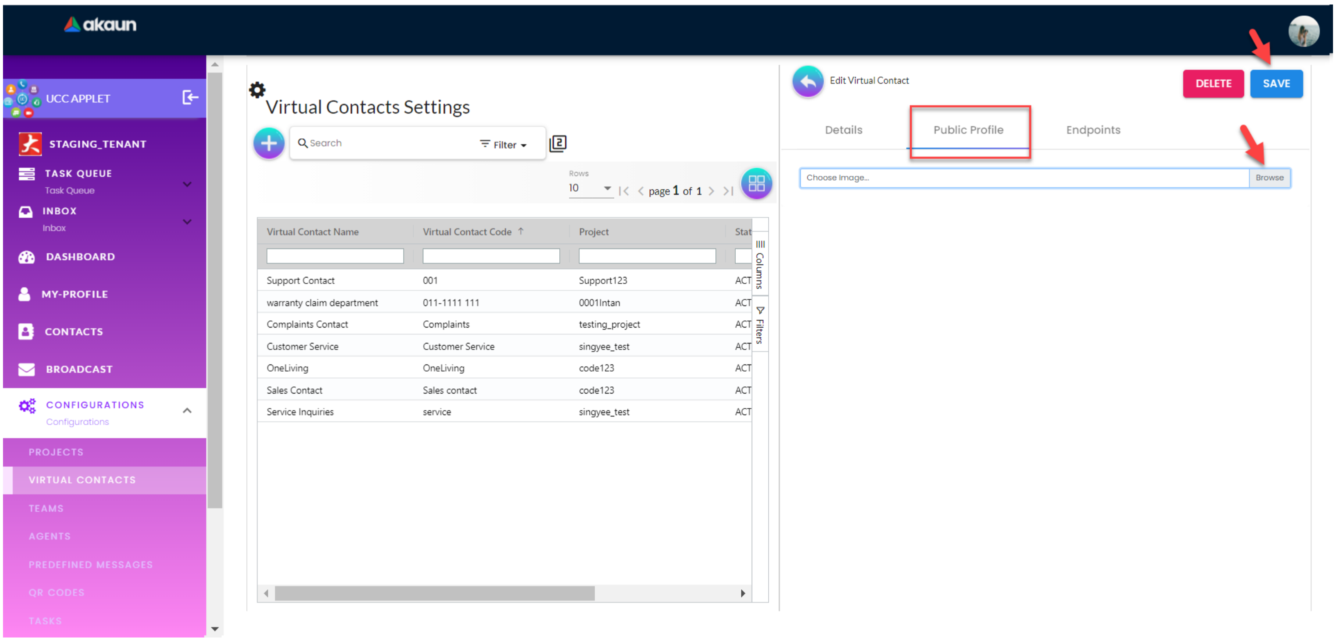
2.1 Next, is to set up the virtual contact. Please fill in the below:

- Virtual contact name
- Virtual contact code
- Tie to the project that you have created in step 1. (You can either tie it with the project here, or tie the project with the virtual contact in the project settings)
- Click “SAVE”

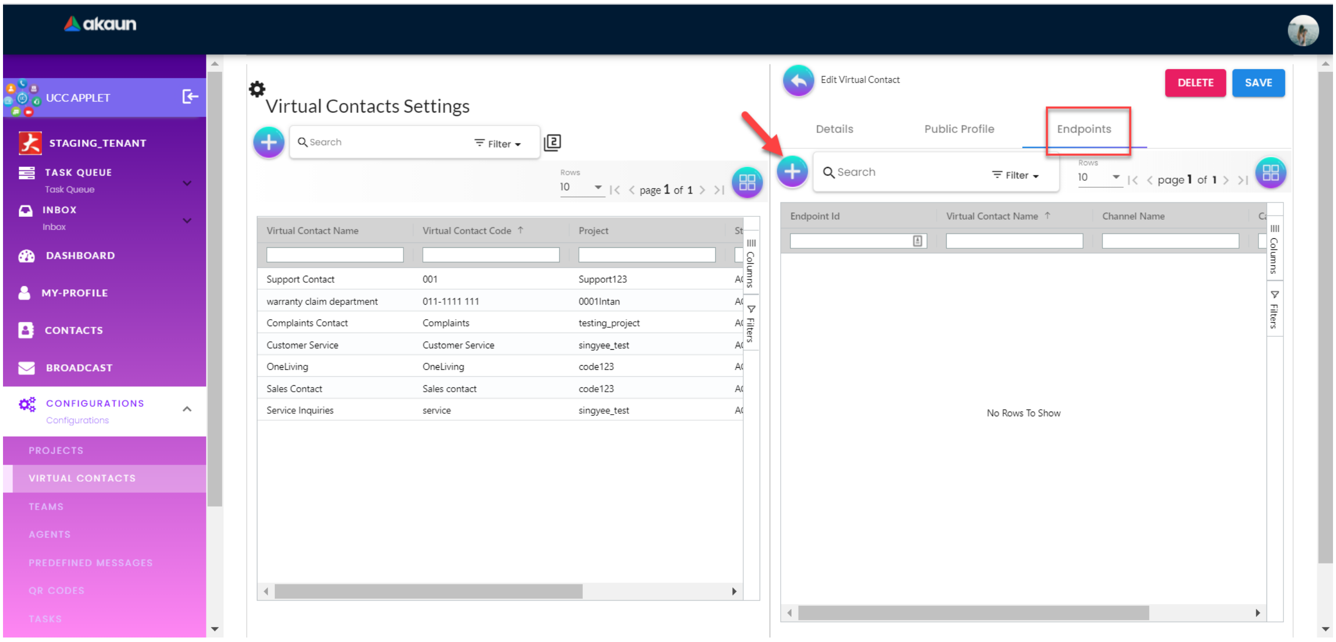


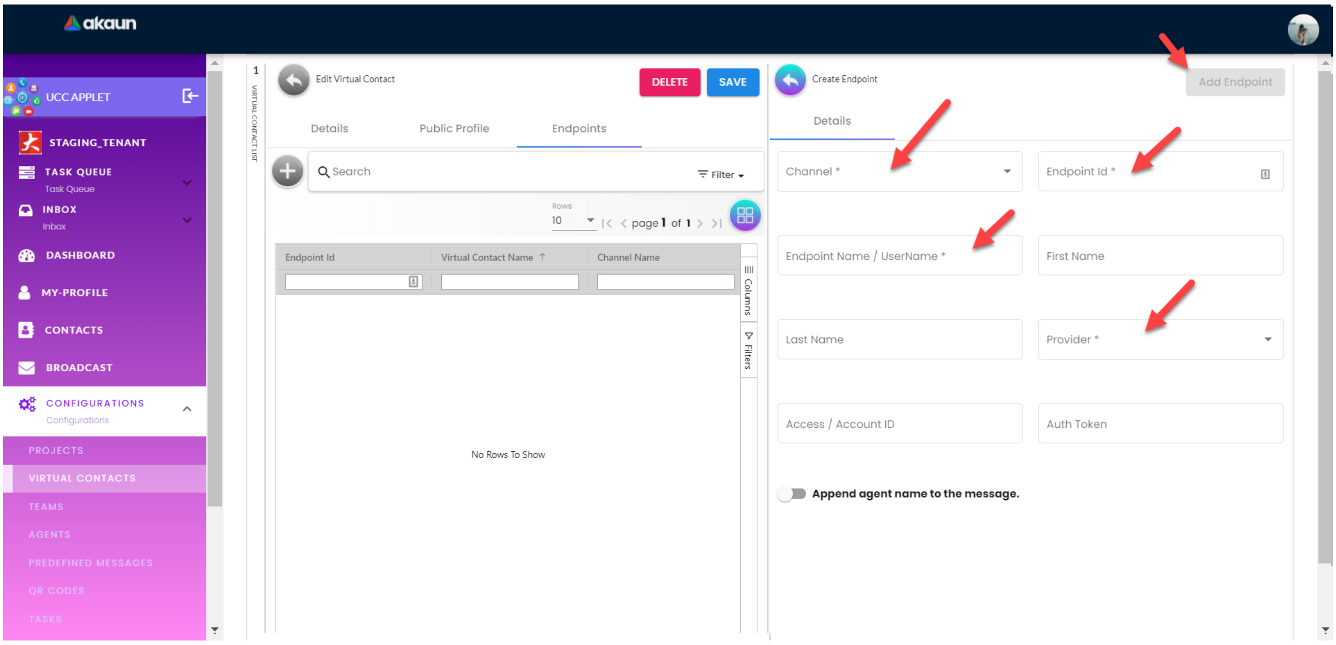
2.2 After creating the virtual contact, you should be able to view it in the listing. Click into the virtual contact that you would like to edit. Please refer to the example below. After you click into the virtual contact, you can see the related details, public profile (can upload image to this project) and endpoint tab.





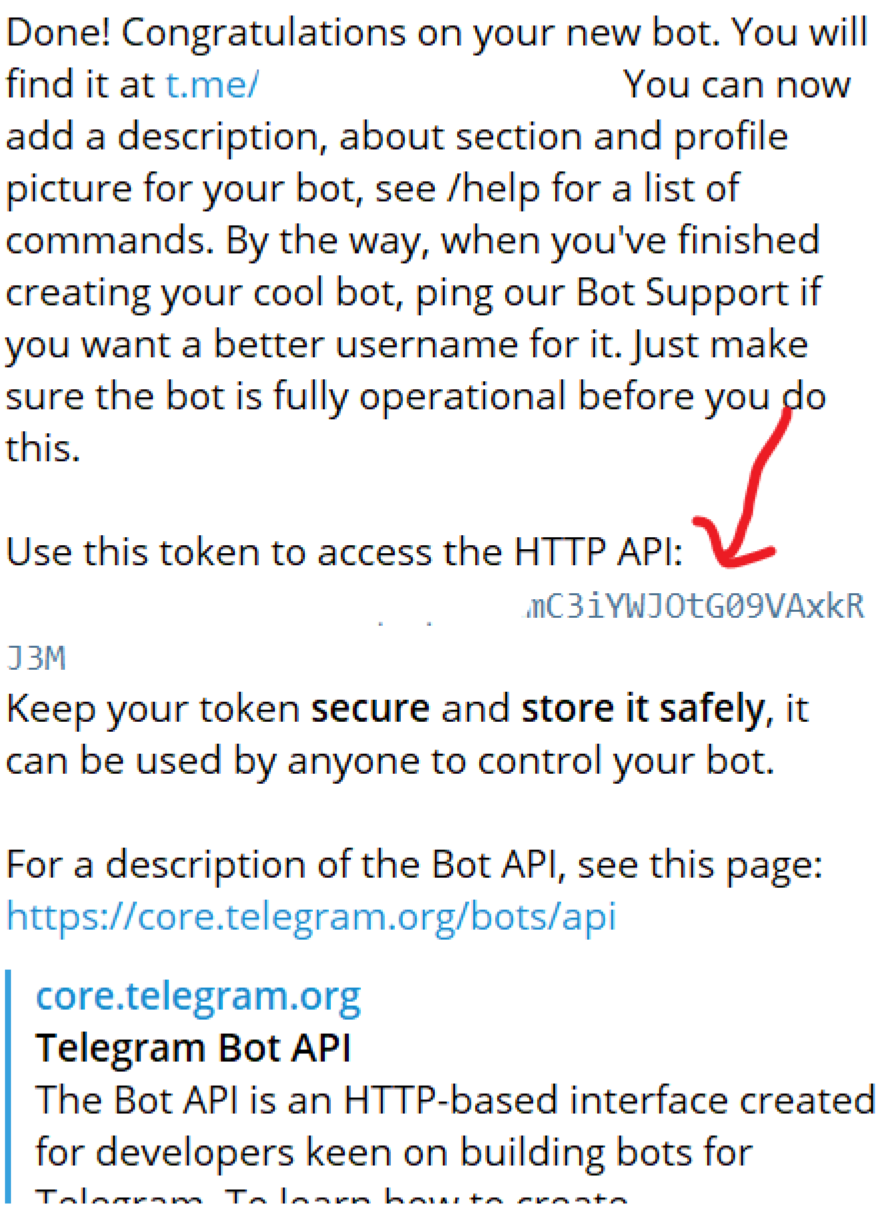
2.3 Next, you need to tie the endpoint with the selected virtual contact. In the details, please select the channel, fill in the Endpoint ID and Endpoint Name and click “Add Endpoint” to add.





A.20.14.3. Telegram

For example, if you are to add a telegram endpoint, the token as per screenshot below is the “endpoint ID” that you need to place in the Endpoint ID field during the setup.


Done! Congratulations on your new bot. You will find it at t.me/ You can now add a description, about section and profile picture for your bot, see /help for a list of commands. By the way, when you've finished creating your cool bot, ping our Bot Support if you want a better username for it. Just make sure the bot is fully operational before you do this.

Use this token to access the HTTP API:
mC3iYWJOtG09VAxkR
J3M
Keep your token **secure** and **store it safely**, it can be used by anyone to control your bot.

For a description of the Bot API, see this page: https://core.telegram.org/bots/api

> core.telegram.org
> **Telegram Bot API**
> The Bot API is an HTTP-based interface created for developers keen on building bots for

A.20.14.4. Whatsapp

- If you are to add a WhatsApp channel, the endpoint ID is the WhatsApp phone number. For instance, +6011xxxxxxxx.

[admin access virtual wahtsApp] | *admin_access_virtual_wahtsApp.png*

- The “account / access ID” and “Auth Token” is referring to the “ACCOUNT SID” and “AUTH TOKEN” respectively in the Twilio console.

Done! Congratulations on your new bot. You will find it at t.me/ You can now add a description, about section and profile picture for your bot, see /help for a list of commands. By the way, when you've finished creating your cool bot, ping our Bot Support if you want a better username for it. Just make sure the bot is fully operational before you do this.

Use this token to access the HTTP API:
mC3iYWJOtG09VAxkR
J3M
Keep your token **secure** and **store it safely**, it can be used by anyone to control your bot.

For a description of the Bot API, see this page:
https://core.telegram.org/bots/api

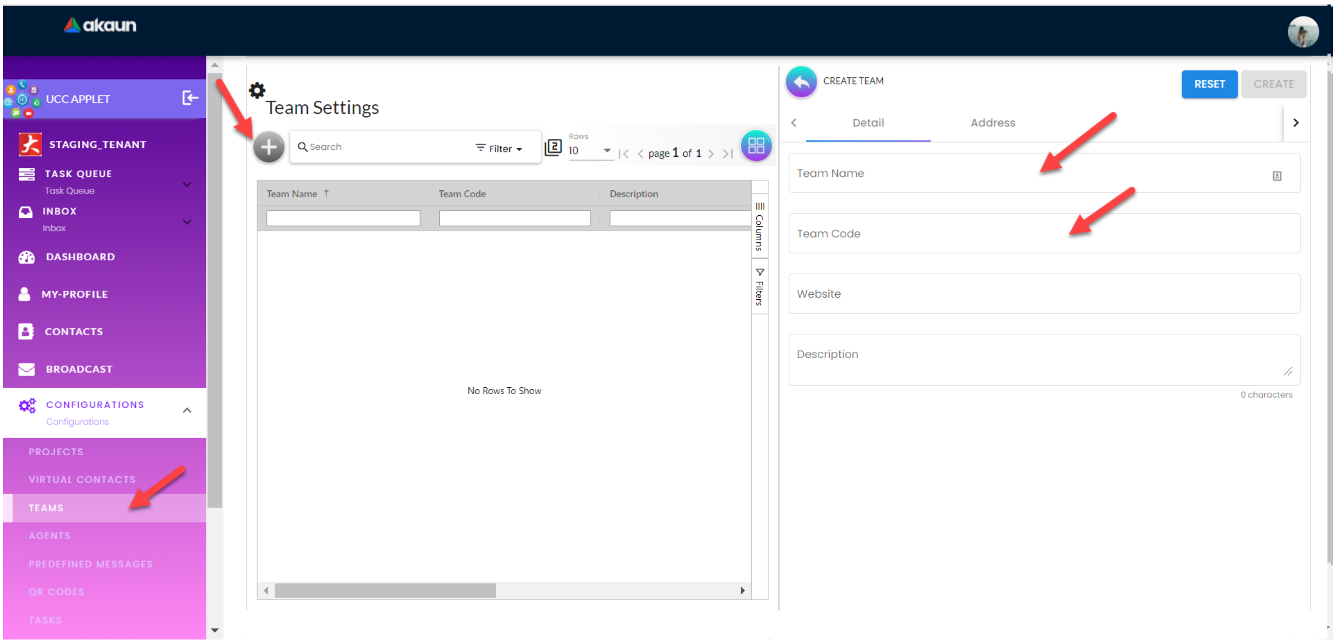
> core.telegram.org
> **Telegram Bot API**
> The Bot API is an HTTP-based interface created for developers keen on building bots for Telegram. To learn how to create

A.20.14.5. 3.0 Team Settings

3.1 Next is to set up the team setting. Please fill in the required fields below (*) to create teams.

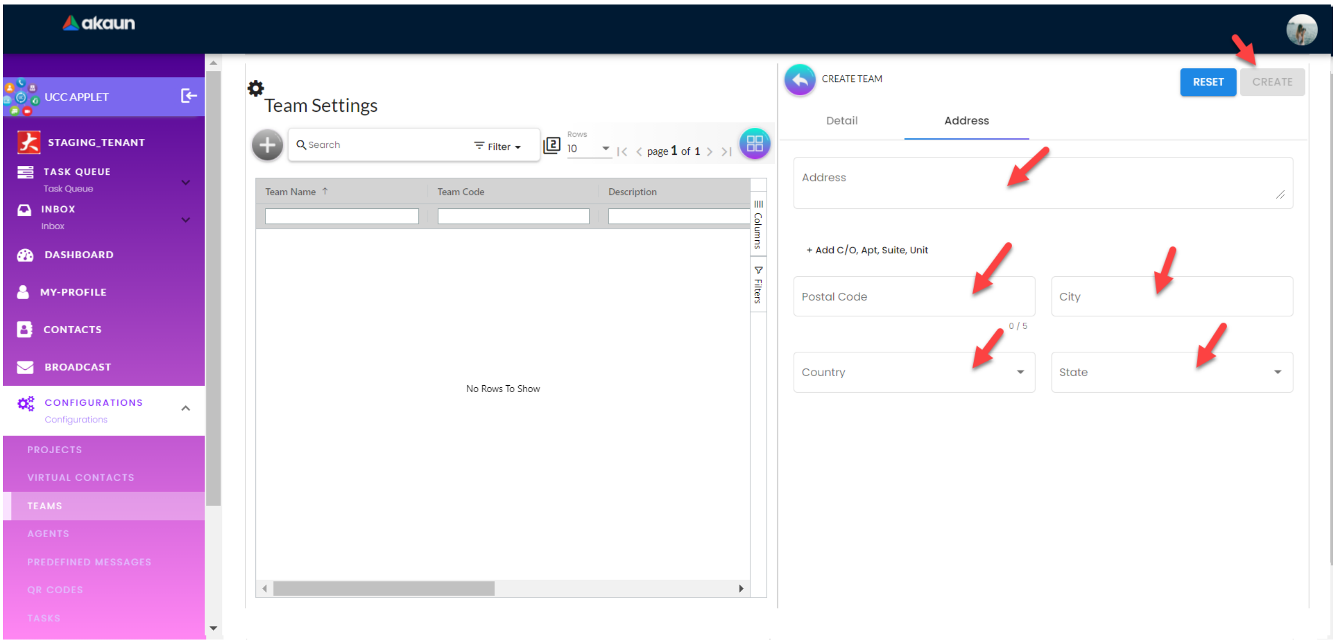
Under [Details] Tab:

- Team Name*
- Team Code*
- Website
- Description



Under [Address] Tab:

- [Address Tab]
- Address*
- Postal Code*
- City*
- Country*
- State*

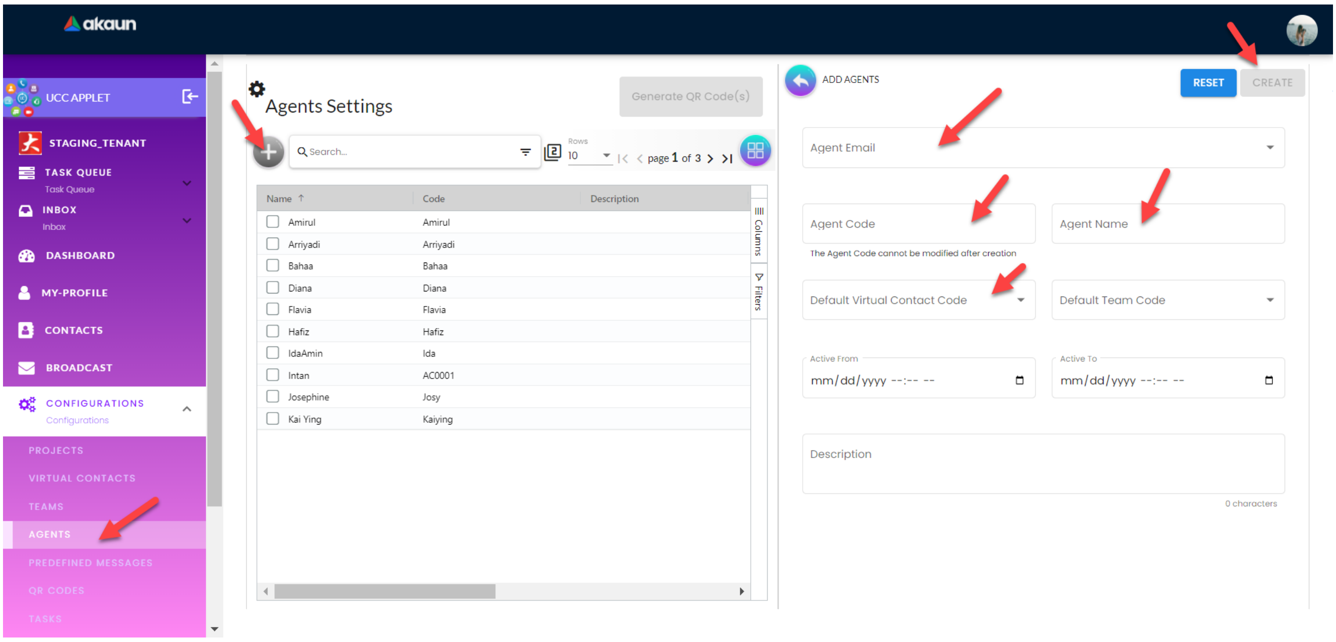


A.20.14.6. 4.0 Agent Settings

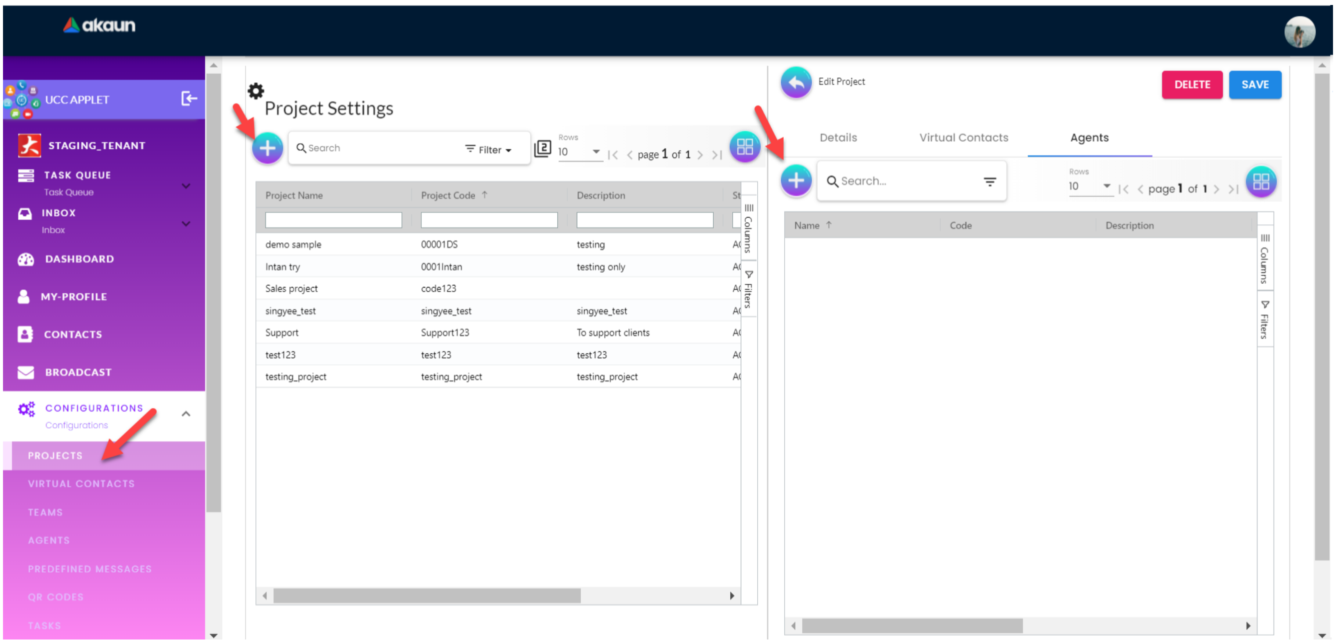
4.1 After creating all the teams in settings, next would be adding all the agents into the agent settings. Please fill in the required fields below (*) to proceed.

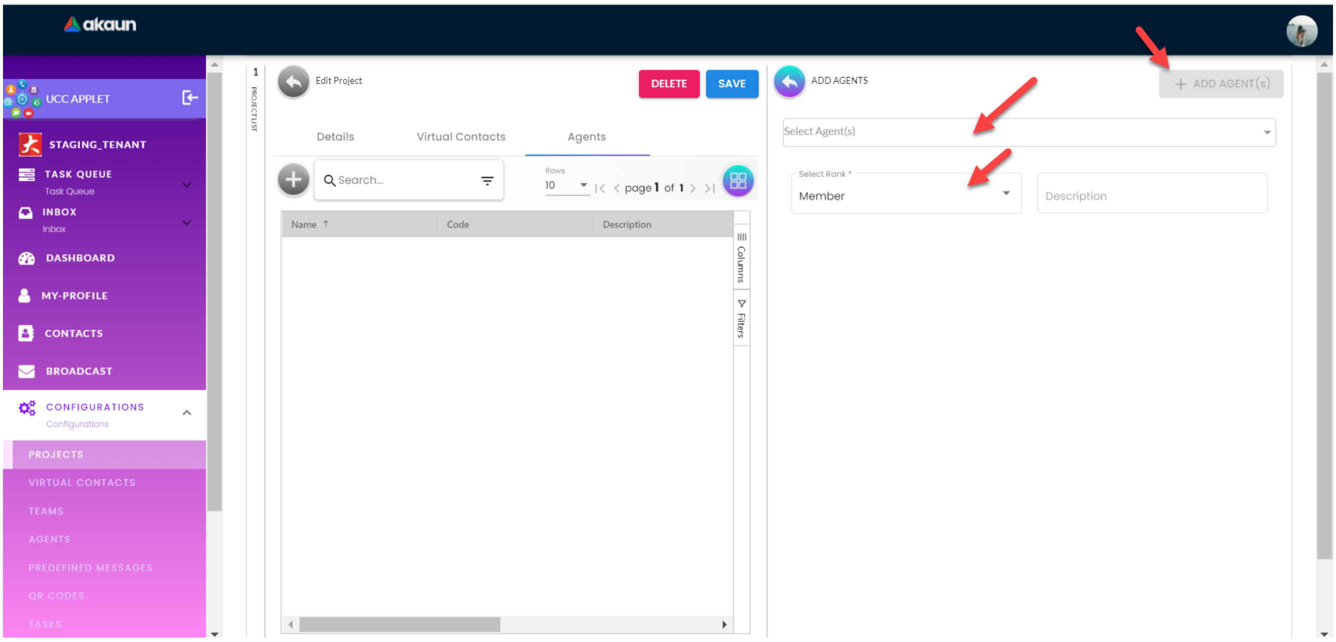
- Agent Email*

- Agent Code*
- Agent Name*
- Default Virtual Contact Code*
- Default Team Code
- Active From
- Active To
- Description



4.2 After the agents are added, now you may assign the agents into the projects that you've set up earlier in step 1. Go back to the project setting, and click into the project that you want to assign agents. Then, click the "+" button to add the agent. Please select the email of agents and assign the rank accordingly. (**This is very important because the agents would not be able to receive conversation if the agent is not added into project)

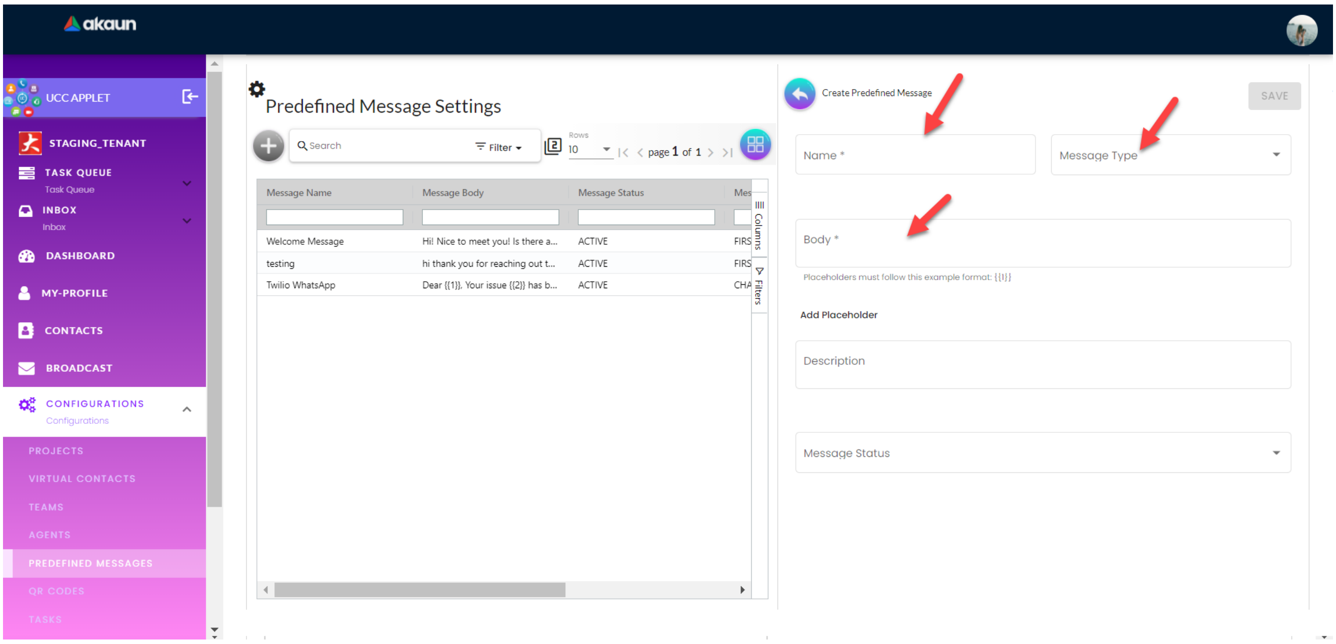




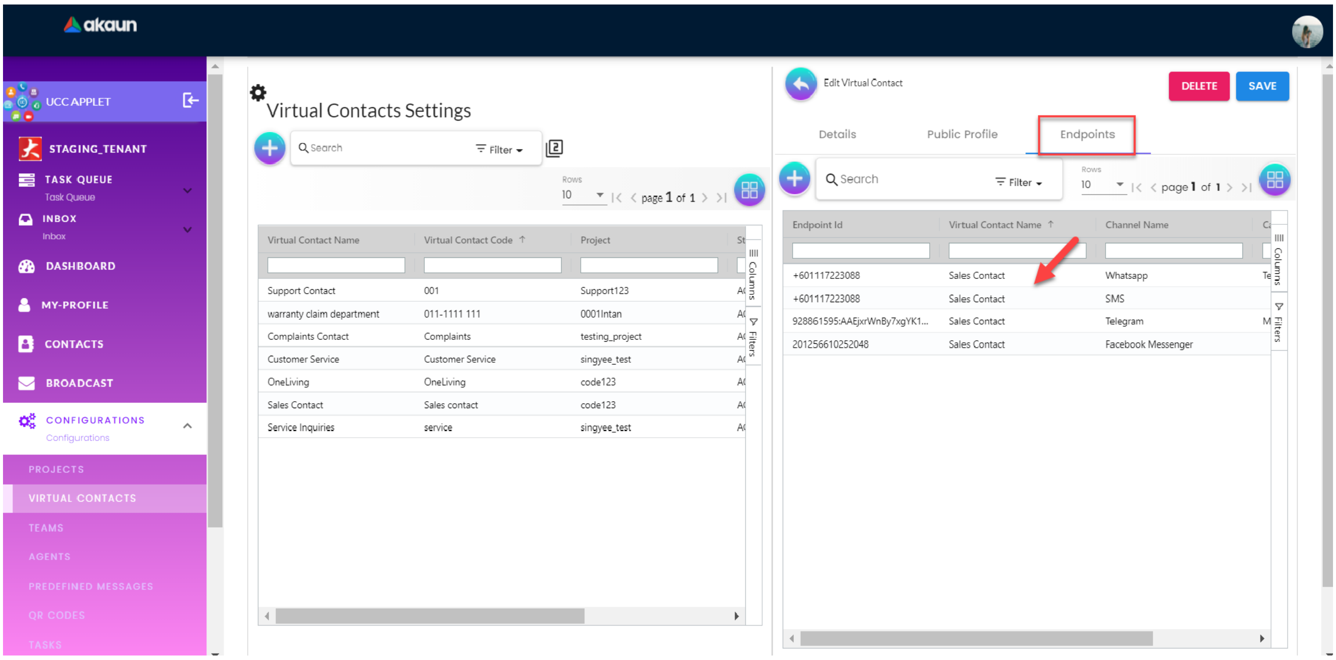
A.20.14.7. 5.0 Predefined Messages Settings

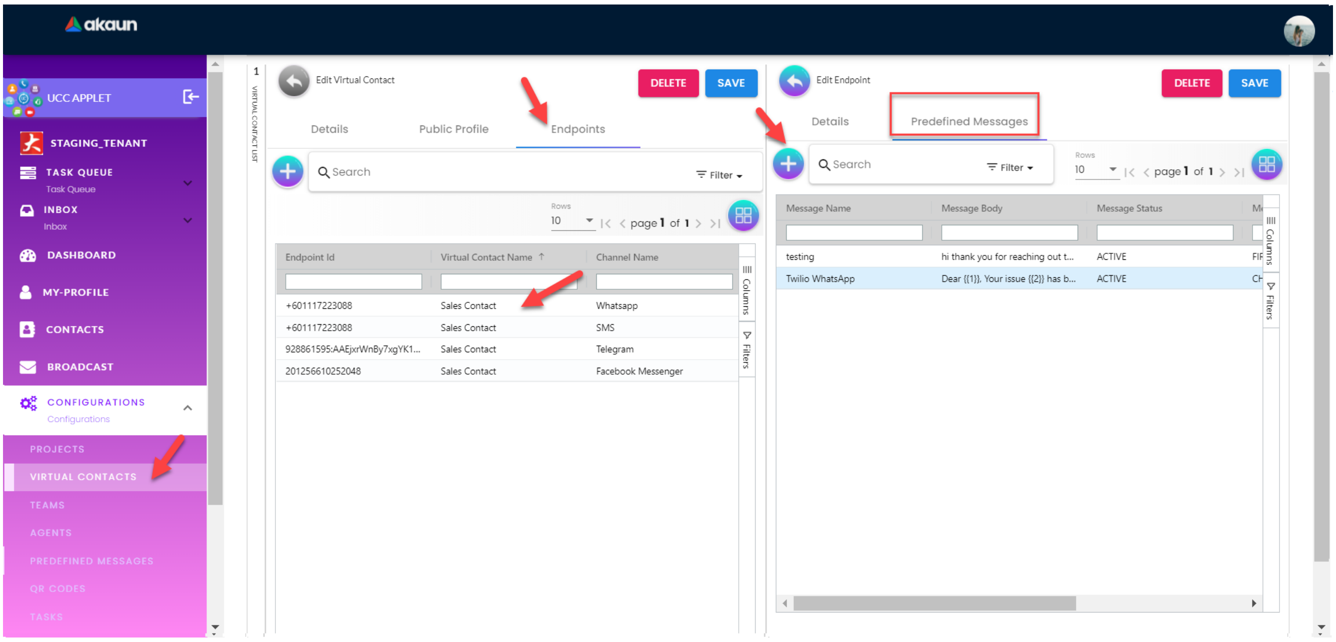
5.1 If you need to pre-set the predefined messages, please go to the predefined message settings and fill in the below:

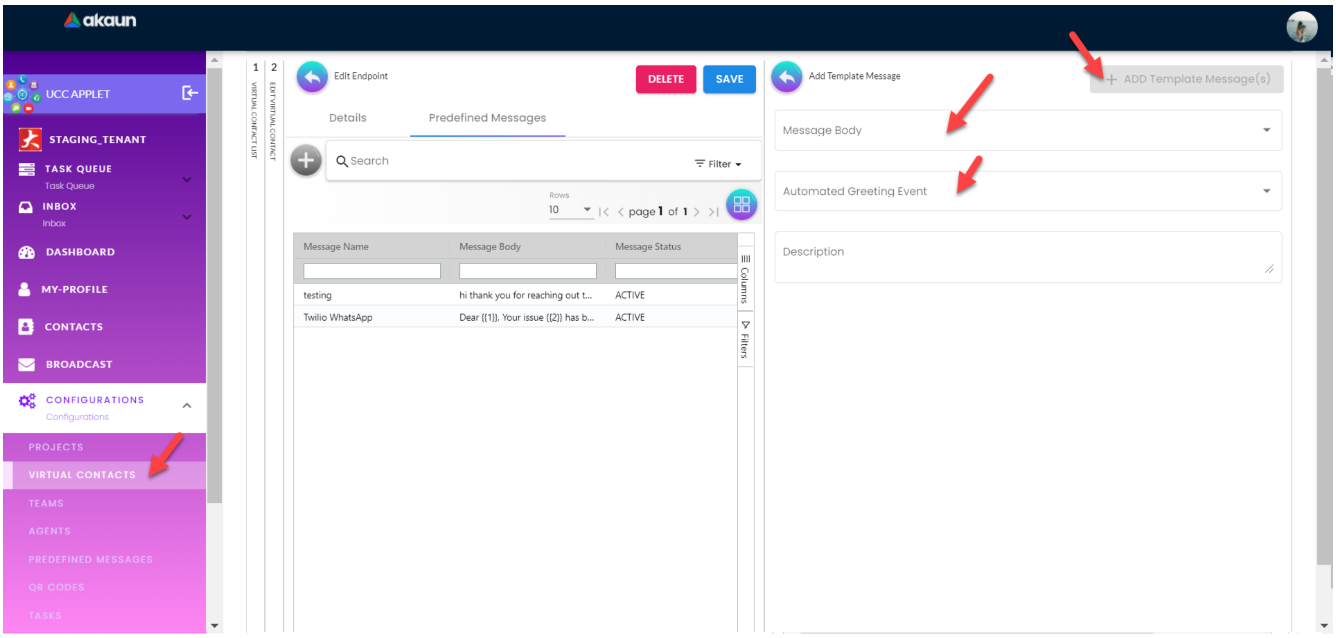
- Name
- Body
- Message Type
- Description (Optional)
- Message Status (Optional)



5.2 After creating predefined messages, you need to go back to the virtual contact settings in order to tie with the predefined messages. Please go to your selected virtual contact and click the endpoint. Under the “Predefined Messages” tab, click the “+” button to add your messages and after filling the details, please click “+ADD Template Message(s)” to add.


akaun
UCC APPLET
STAGING_TENANT
TASK QUEUE
INBOX
DASHBOARD
MY-PROFILE
CONTACTS
BROADCAST
CONFIGURATIONS
PROJECTS
VIRTUAL CONTACTS
TEAMS
AGENTS
PREDEFINED MESSAGES
QR CODES
TASKS
Virtual Contacts Settings
Virtual Contact Name
Virtual Contact Code
Project
Support Contact 001 Support123
warranty claim department 011-1111 111 0001Intan
Complaints Contact Complaints testing_project
Customer Service Customer Service singyee_test
OneLiving OneLiving code123
Sales Contact Sales contact code123
Service Inquiries service singyee_test
Edit Virtual Contact
DELETE
SAVE
Details
Public Profile
Endpoints
Endpoint Id
Virtual Contact Name
Channel Name
+601117223088 Sales Contact Whatsapp
+601117223088 Sales Contact SMS
928861595:AAEjxrWnBy7xgYK1... Sales Contact Telegram
201256610252048 Sales Contact Facebook Messenger


akaun
Edit Virtual Contact
DELETE
SAVE
Details
Public Profile
Endpoints
Endpoint Id
Virtual Contact Name
Channel Name
+601117223088 Sales Contact Whatsapp
+601117223088 Sales Contact SMS
928861595:AAEjxrWnBy7xgYK1... Sales Contact Telegram
201256610252048 Sales Contact Facebook Messenger
Edit Endpoint
Details
Predefined Messages
Message Name
Message Body
Message Status
testing hi thank you for reaching out t... ACTIVE
Twilio WhatsApp Dear {{1}}. Your issue {{2}} has b... ACTIVE


akaun
Edit Endpoint
DELETE
SAVE
Details
Predefined Messages
Message Name
Message Body
Message Status
testing hi thank you for reaching out t... ACTIVE
Twilio WhatsApp Dear {{1}}. Your issue {{2}} has b... ACTIVE
Add Template Message
ADD Template Message(s)
Message Body
Automated Greeting Event
Description

5.3(a) For Whatsapp Twilio Predefined messages:

- [Compulsory] After approval by Twilio Whatsapp on the submitted template messages, the admin user is still required to set up the approved template message manually in the predefined message settings in UCC applet.

4.3(b) For any predefined messages in all channels:

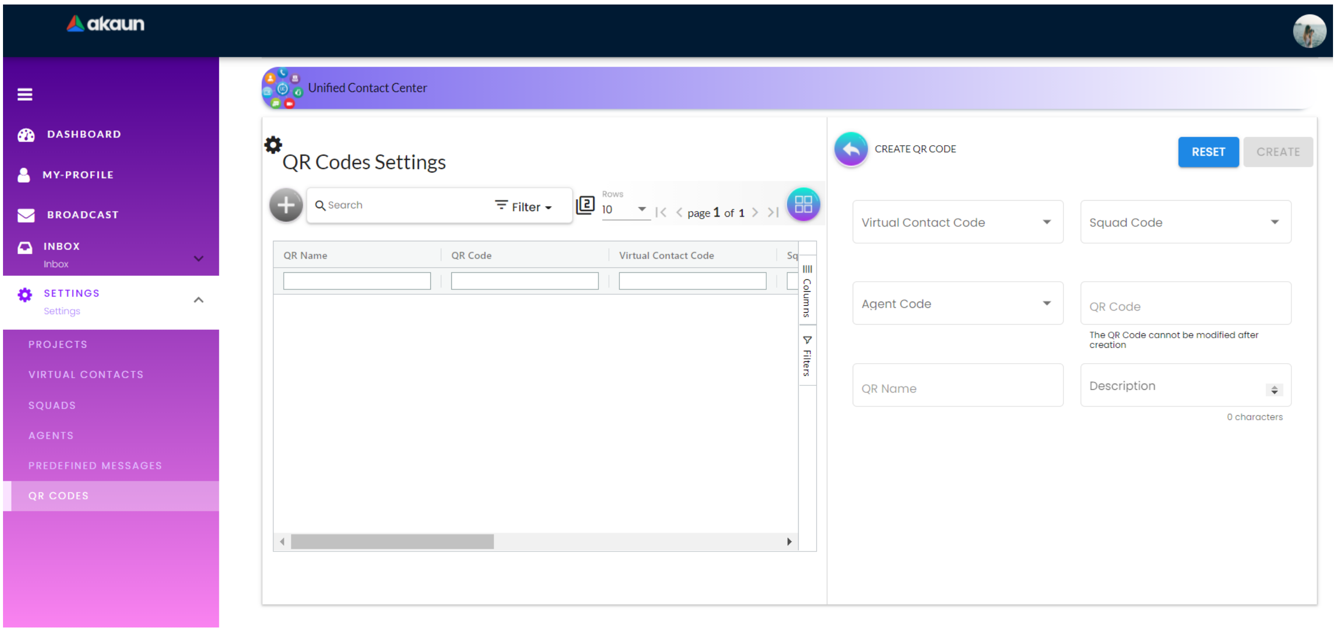
- [Optional] After setting up in predefined message settings, the admin user needs to tie the predefined messages to the virtual contact in virtual contact settings. Under the predefined messages tab in the virtual contact settings, the admin can tie with the automated greeting event. (screenshot 4.3)
- None (By default)
  - If none is selected, it means that the predefined message would not be sent out as an automated message by the system and can only be sent out manually by the agents.
- New Session
  - If this option is selected, it means that the predefined message would be sent out as an automated message by the system and can also be sent out manually by the agents if the condition of “New Session” is met. *(For example, if the predefined message is an auto-reply message and the conversation is a new session opened from the end customer after which the last conversation is ended, then this new session would trigger the auto-reply predefined message which is set to be automated to be sent out in the new session.)*
- New Conversation
  - If this option is selected, it means that the predefined message would be sent out as an automated message by the system and can also be sent out manually by the agents if the condition of “New Conversation” is met. *(For example, if the predefined message is an auto-reply message and the conversation is a new conversation initiated from the end customer in the channel, then this new conversation would trigger the auto-reply predefined message which is set to be automated to be sent out in the new conversation.)*
- Idle Time
  - If this option is selected, it means that the predefined message would be sent out as an automated message by the system and can also be sent out manually by the agents if the condition of “Idle Time” and “Idle Time In Days” are met. *(For example, if the condition of the predefined message is set to be “Idle Time” and “Idle Time In Days” is 2 days in the automated greeting event setting, the initiated conversation from the end customer after idle for 2 days would trigger the predefined message to be sent out automatically by the system.)*

A.20.14.8. 6.0 QR Code Settings

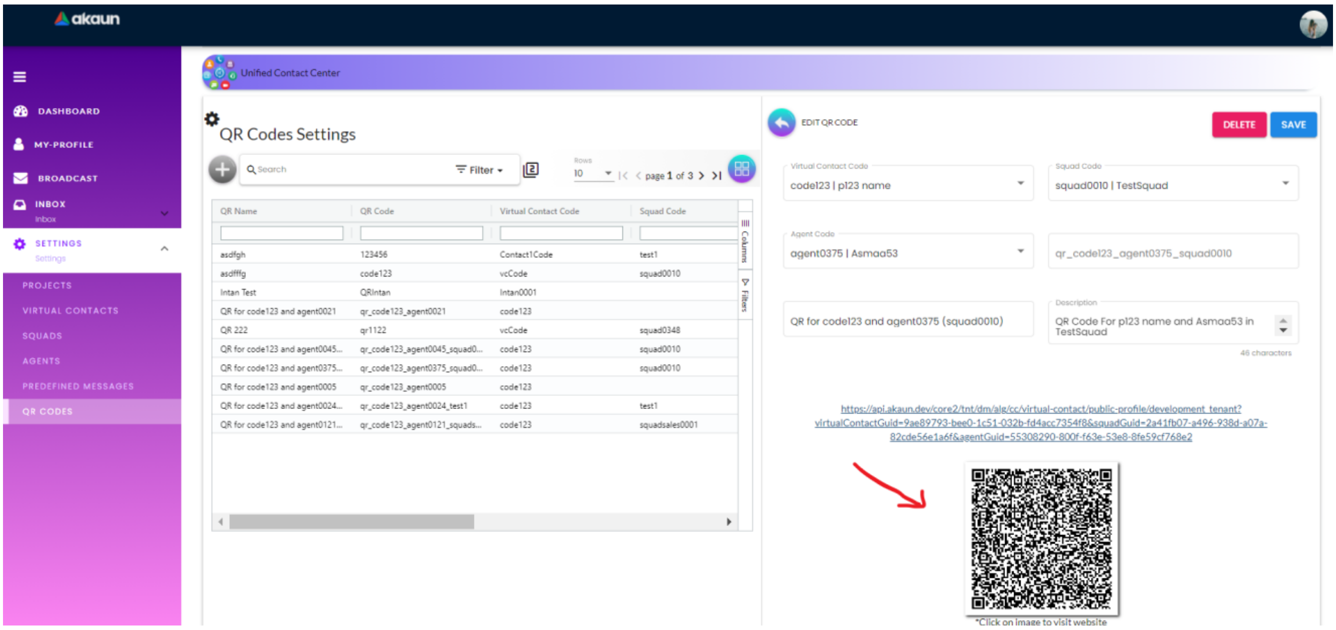
6.1 In the QR Code settings, you can create agent QR code here by filling in the fields below:

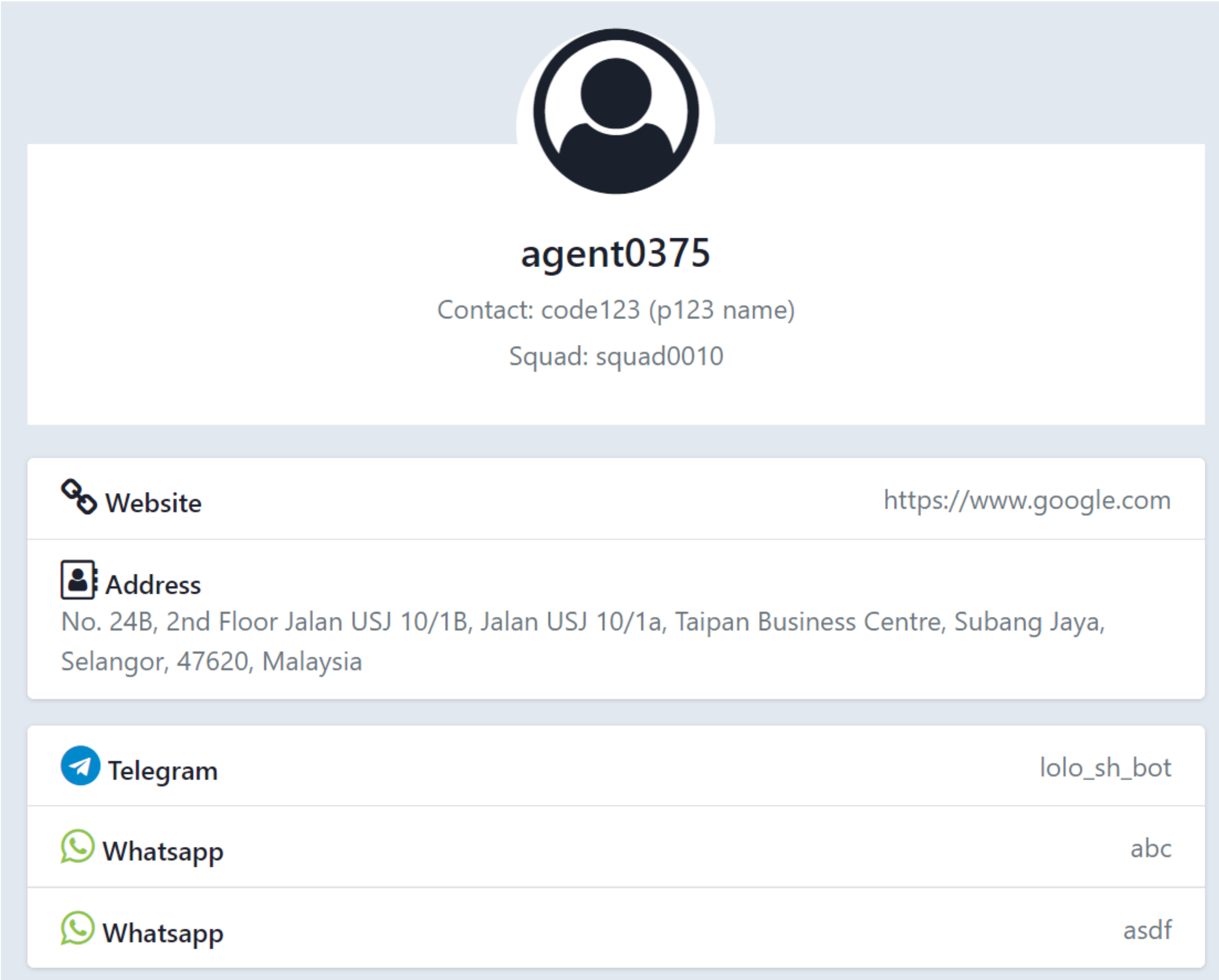
- Virtual Contact
- Squad Code
- QR Code
- Agent Code

- QR Name
- Description

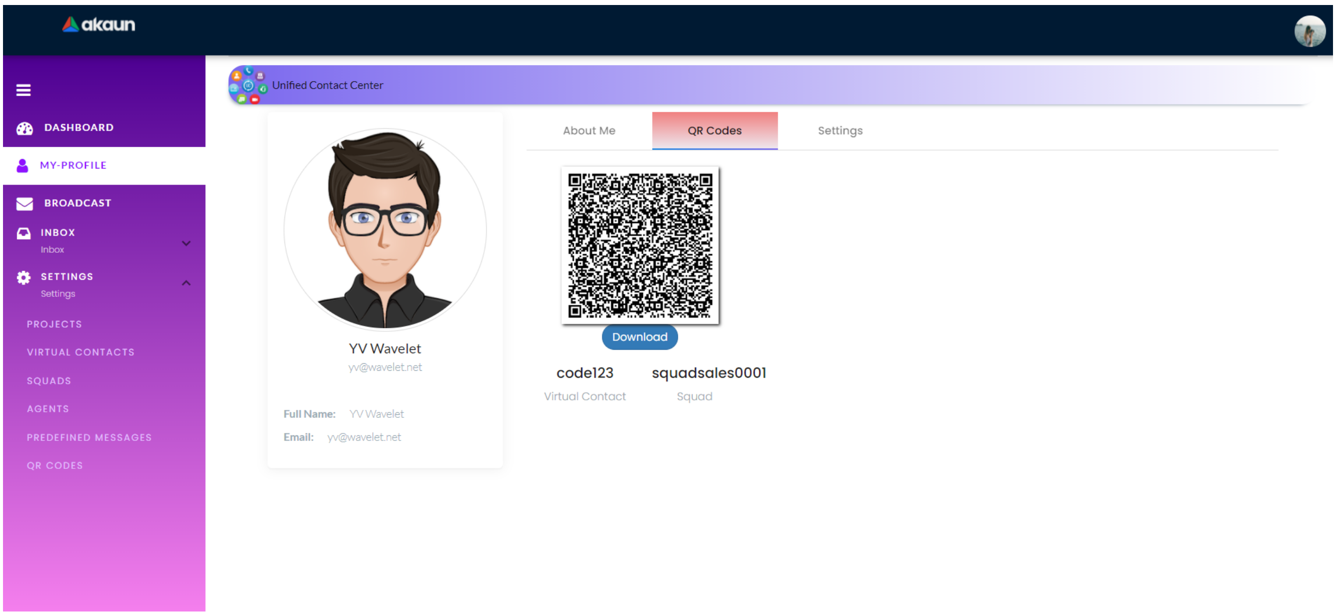


6.2 After creating the QR code, the QR code with the link will appear at the right bottom as below. The user can send the link to the customer to scan.

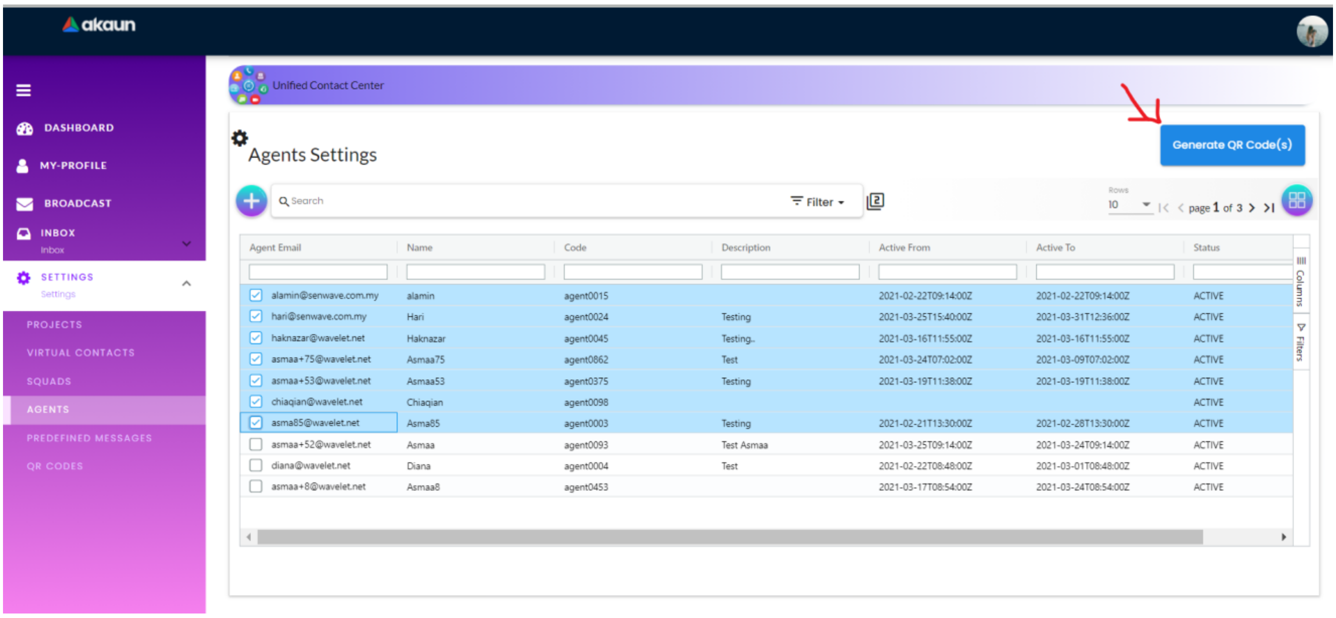




6.3 After generating the QR code, the agents can find his / her QR code in the QR Code Tabs as well in the profile page.



6.4 As an administrator, you can select the agents one by one or in bulk for generating the QR codes. The QR code will appear on the agent's profile page as indicated in step 5.3 as well.



A.20.15. 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.20.16. Pricing

A.20.17. Release Note

A.20.18. Roadmap

A.21. URL Shortening Applet

A.21.1. 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

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.21.2. 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.21.3. Menu 01 - e.g. Sales Orders Listing

A.21.4. Menu 02 - e.g. Line Items

A.21.5. Permission Settings

A.21.6. Personalization

A.21.7. 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.21.8. Pricing

A.21.9. Release Note

A.21.10. Roadmap

A.22. Platform SysAdmin Applet

A.22.1. 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.22.2. 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.22.3. Menu 01 - e.g. Sales Orders Listing

A.22.4. Menu 02 - e.g. Line Items

A.22.5. Permission Settings

A.22.6. Personalization

A.22.7. 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.22.8. Pricing

A.22.9. Release Note

A.22.10. Roadmap

A.23. Developer SysAdmin Applet

A.23.1. Introduction

This is a simple description of the applet, no more than 100 words.

A.23.2. 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.23.3. Menu 01 - e.g. Sales Orders Listing

A.23.4. Menu 02 - e.g. Line Items

A.23.5. Permission Settings

A.23.6. Personalization

A.23.7. 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

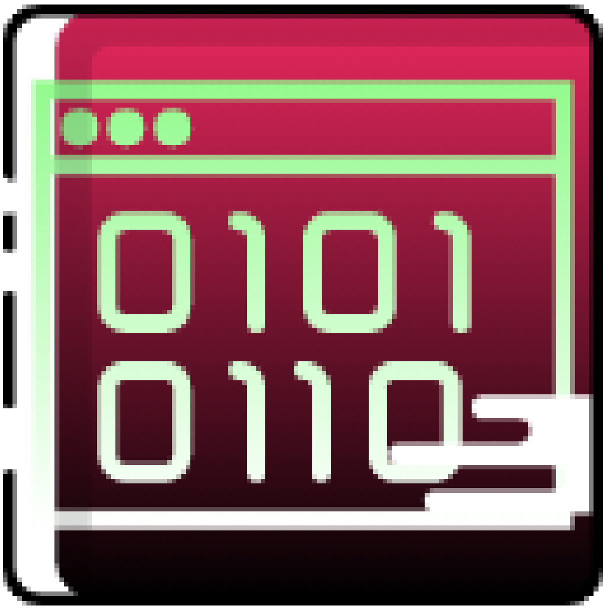
A.23.8. Pricing

A.23.9. Release Note

A.23.10. Roadmap

A.24. Developer Applet

A.24.1. Introduction



This is a simple description of the applet, no more than 100 words.

A.24.2. 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.24.3. Menu 01 - e.g. Sales Orders Listing

A.24.4. Menu 02 - e.g. Line Items

A.24.5. Permission Settings

A.24.6. Personalization

A.24.7. 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.24.8. Pricing

A.24.9. Release Note

A.24.10. Roadmap

A.25. Financial Report Applet

A.25.1. Introduction

This is a simple description of the applet, no more than 100 words.

A.25.2. 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.25.3. Menu 01 - e.g. Sales Orders Listing

A.25.4. Menu 02 - e.g. Line Items

A.25.5. Permission Settings

A.25.6. Personalization

A.25.7. 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.25.8. Pricing

A.25.9. Release Note

A.25.10. Roadmap

A.26. Beauty Pos Applet

A.26.1. Introduction

This is a simple description of the applet, no more than 100 words.

A.26.2. 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.26.3. Menu 01 - e.g. Sales Orders Listing

A.26.4. Menu 02 - e.g. Line Items

A.26.5. Permission Settings

A.26.6. Personalization

A.26.7. 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

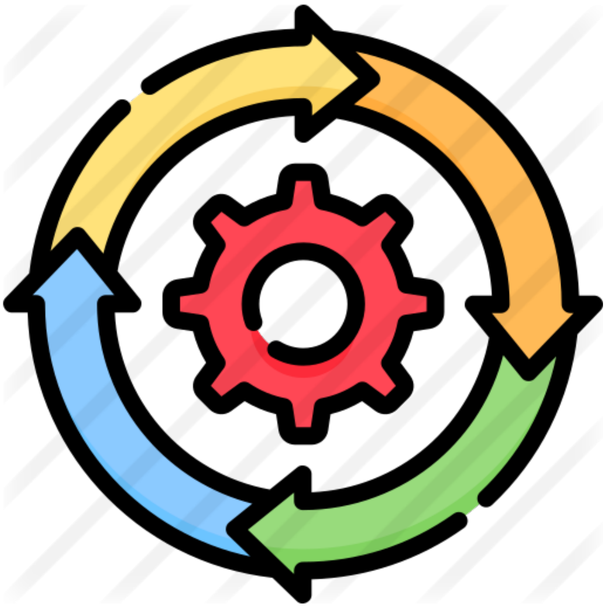
A.26.8. Pricing

A.26.9. Release Note

A.26.10. Roadmap

A.27. Process Monitoring Applet

A.27.1. Introduction



This is a simple description of the applet, no more than 100 words.

A.27.2. 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.27.3. Menu 01 - e.g. Sales Orders Listing

A.27.4. Menu 02 - e.g. Line Items

A.27.5. Permission Settings

A.27.6. Personalization

A.27.7. 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.27.8. Pricing

A.27.9. Release Note

A.27.10. Roadmap

A.28. Internal Stock Transfer Applet

A.28.1. Introduction

This is a simple description of the applet, no more than 100 words.

A.28.2. 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.28.3. Menu 01 - e.g. Sales Orders Listing

A.28.4. Menu 02 - e.g. Line Items

A.28.5. Permission Settings

A.28.6. Personalization

A.28.7. 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.28.8. Pricing

A.28.9. Release Note

A.28.10. Roadmap

A.29. Internal Sales Return Applet

A.29.1. Introduction

This is a simple description of the applet, no more than 100 words.

A.29.2. 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.29.3. Menu 01 - e.g. Sales Orders Listing

A.29.4. Menu 02 - e.g. Line Items

A.29.5. Permission Settings

A.29.6. Personalization

A.29.7. 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.29.8. Pricing

A.29.9. Release Note

A.29.10. Roadmap

A.30. Internal Receipt Voucher Applet

A.30.1. Introduction

This is a simple description of the applet, no more than 100 words.

A.30.2. 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.30.3. Menu 01 - e.g. Sales Orders Listing

A.30.4. Menu 02 - e.g. Line Items

A.30.5. Permission Settings

A.30.6. Personalization

A.30.7. 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.30.8. Pricing

A.30.9. Release Note

A.30.10. Roadmap

A.31. Internal Purchase Order Applet

A.31.1. Introduction

This is a simple description of the applet, no more than 100 words.

A.31.2. 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.31.3. Menu 01 - e.g. Sales Orders Listing

A.31.4. Menu 02 - e.g. Line Items

A.31.5. Permission Settings

A.31.6. Personalization

A.31.7. 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.31.8. Pricing

A.31.9. Release Note

A.31.10. Roadmap

A.32. Internal Purchase Invoice Applet

A.32.1. Introduction

This is a simple description of the applet, no more than 100 words.

A.32.2. 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.32.3. Menu 01 - e.g. Sales Orders Listing

A.32.4. Menu 02 - e.g. Line Items

A.32.5. Permission Settings

A.32.6. Personalization

A.32.7. 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

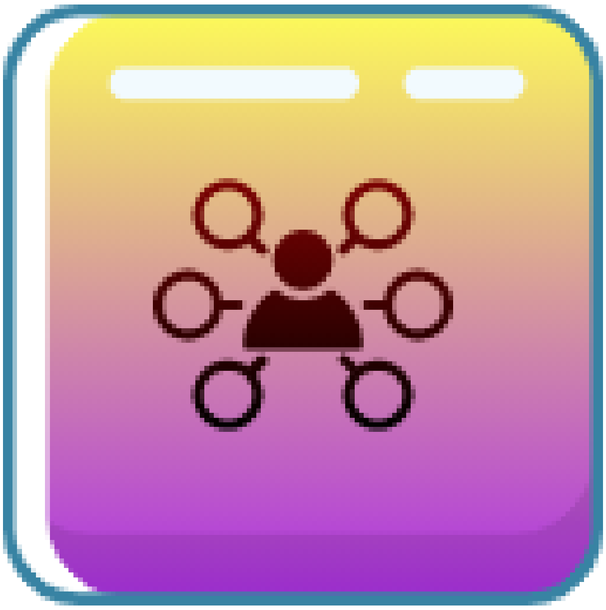
A.32.8. Pricing

A.32.9. Release Note

A.32.10. Roadmap

A.33. Group Maintenance Applet

A.33.1. Introduction



This is a simple description of the applet, no more than 100 words.

A.33.2. 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”
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- 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.33.3. Menu 01 - e.g. Sales Orders Listing

A.33.4. Menu 02 - e.g. Line Items

A.33.5. Permission Settings

A.33.6. Personalization

A.33.7. 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.33.8. Pricing

A.33.9. Release Note

A.33.10. Roadmap

A.34. Internal Purchase GRN Applet

A.34.1. Introduction

This is a simple description of the applet, no more than 100 words.

A.34.2. 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.34.3. Menu 01 - e.g. Sales Orders Listing

A.34.4. Menu 02 - e.g. Line Items

A.34.5. Permission Settings

A.34.6. Personalization

A.34.7. 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.34.8. Pricing

A.34.9. Release Note

A.34.10. Roadmap

A.35. Internal Payment Voucher Applet

A.35.1. Introduction

This is a simple description of the applet, no more than 100 words.

A.35.2. 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.35.3. Menu 01 - e.g. Sales Orders Listing

A.35.4. Menu 02 - e.g. Line Items

A.35.5. Permission Settings

A.35.6. Personalization

A.35.7. 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.35.8. Pricing

A.35.9. Release Note

A.35.10. Roadmap

A.36. Internal Sales Invoice Applet

A.36.1. Introduction

This is a simple description of the applet, no more than 100 words.

A.36.2. 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.36.3. Menu 01 - e.g. Sales Orders Listing

A.36.4. Menu 02 - e.g. Line Items

A.36.5. Permission Settings

A.36.6. Personalization

A.36.7. 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.36.8. Pricing

A.36.9. Release Note

A.36.10. Roadmap

A.37. Internal Sales Order Applet

A.37.1. Introduction

This is a simple description of the applet, no more than 100 words.

A.37.2. 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.37.3. Menu 01 - e.g. Sales Orders Listing

A.37.4. Menu 02 - e.g. Line Items

A.37.5. Permission Settings

A.37.6. Personalization

A.37.7. 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.37.8. Pricing

A.37.9. Release Note

A.37.10. Roadmap

A.38. Internal Purchase Credit Note Applet

A.38.1. Introduction

This is a simple description of the applet, no more than 100 words.

A.38.2. 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.38.3. Menu 01 - e.g. Sales Orders Listing

A.38.4. Menu 02 - e.g. Line Items

A.38.5. Permission Settings

A.38.6. Personalization

A.38.7. 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.38.8. Pricing

A.38.9. Release Note

A.38.10. Roadmap

A.39. Internal Purchase Debit Note Applet

A.39.1. Introduction

This is a simple description of the applet, no more than 100 words.

A.39.2. 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.39.3. Menu 01 - e.g. Sales Orders Listing

A.39.4. Menu 02 - e.g. Line Items

A.39.5. Permission Settings

A.39.6. Personalization

A.39.7. 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.39.8. Pricing

A.39.9. Release Note

A.39.10. Roadmap

A.40. Internal Sales Debit Note Applet

A.40.1. Introduction

This is a simple description of the applet, no more than 100 words.

A.40.2. 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.40.3. Menu 01 - e.g. Sales Orders Listing

A.40.4. Menu 02 - e.g. Line Items

A.40.5. Permission Settings

A.40.6. Personalization

A.40.7. 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.40.8. Pricing

A.40.9. Release Note

A.40.10. Roadmap

A.41. Internal Job Sheet Applet

A.41.1. Introduction

This is a simple description of the applet, no more than 100 words.

A.41.2. 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.41.3. Menu 01 - e.g. Sales Orders Listing

A.41.4. Menu 02 - e.g. Line Items

A.41.5. Permission Settings

A.41.6. Personalization

A.41.7. 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

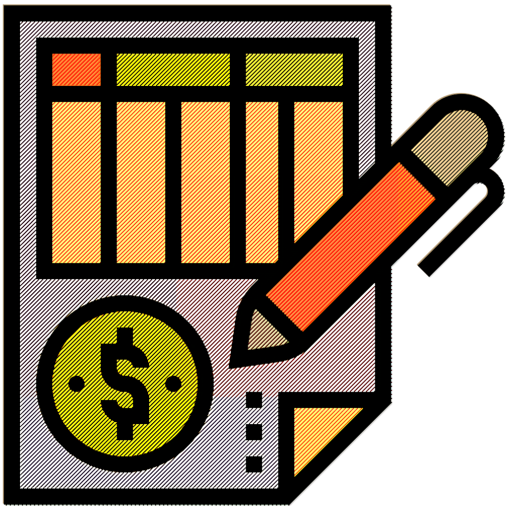
A.41.8. Pricing

A.41.9. Release Note

A.41.10. Roadmap

A.42. Ledger and Journal Applet

A.42.1. Introduction



This is a simple description of the applet, no more than 100 words.

A.42.2. 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.42.3. Menu 01 - e.g. Sales Orders Listing

A.42.4. Menu 02 - e.g. Line Items

A.42.5. Permission Settings

A.42.6. Personalization

A.42.7. 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.42.8. Pricing

A.42.9. Release Note

A.42.10. Roadmap

A.43. Membership Admin Applet

A.43.1. Introduction

This is a simple description of the applet, no more than 100 words.

A.43.2. 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.43.3. Menu 01 - e.g. Sales Orders Listing

A.43.4. Menu 02 - e.g. Line Items

A.43.5. Permission Settings

A.43.6. Personalization

A.43.7. 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.43.8. Pricing

A.43.9. Release Note

A.43.10. Roadmap

A.44. Internal Sale Proforma Applet

A.44.1. Introduction

This is a simple description of the applet, no more than 100 words.

A.44.2. 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.44.3. Menu 01 - e.g. Sales Orders Listing

A.44.4. Menu 02 - e.g. Line Items

A.44.5. Permission Settings

A.44.6. Personalization

A.44.7. 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.44.8. Pricing

A.44.9. Release Note

A.44.10. Roadmap

A.45. Pricebook Applet

A.45.1. Introduction

This is a simple description of the applet, no more than 100 words.

A.45.2. 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.45.3. Menu 01 - e.g. Sales Orders Listing

A.45.4. Menu 02 - e.g. Line Items

A.45.5. Permission Settings

A.45.6. Personalization

A.45.7. 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.45.8. Pricing

A.45.9. Release Note

A.45.10. Roadmap

A.46. Internal Shopping Cart Applet

A.46.1. Introduction

This is a simple description of the applet, no more than 100 words.

A.46.2. 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.46.3. Menu 01 - e.g. Sales Orders Listing

A.46.4. Menu 02 - e.g. Line Items

A.46.5. Permission Settings

A.46.6. Personalization

A.46.7. 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.46.8. Pricing

A.46.9. Release Note

A.46.10. Roadmap

A.47. Internal Stock Adjustment Applet

A.47.1. Introduction

image::stock_adjustment_applet_logo.png

This is a simple description of the applet, no more than 100 words.

A.47.2. 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.47.3. Menu 01 - e.g. Sales Orders Listing

A.47.4. Menu 02 - e.g. Line Items

A.47.5. Permission Settings

A.47.6. Personalization

A.47.7. 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.47.8. Pricing

A.47.9. Release Note

A.47.10. Roadmap

A.48. Stock Availability Applet

A.48.1. Introduction

This is a simple description of the applet, no more than 100 words.

A.48.2. 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.48.3. Menu 01 - e.g. Sales Orders Listing

A.48.4. Menu 02 - e.g. Line Items

A.48.5. Permission Settings

A.48.6. Personalization

A.48.7. 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.48.8. Pricing

A.48.9. Release Note

A.48.10. Roadmap

A.49. Stock Balance Applet

A.49.1. Introduction

[150] | *stock_balance_applet_logo.png*

This is a simple description of the applet, no more than 100 words.

A.49.2. 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.49.3. Menu 01 - e.g. Sales Orders Listing

A.49.4. Menu 02 - e.g. Line Items

A.49.5. Permission Settings

A.49.6. Personalization

A.49.7. 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.49.8. Pricing

A.49.9. Release Note

A.49.10. Roadmap

A.50. Internal Delivery Order Applet

A.50.1. Introduction

This is a simple description of the applet, no more than 100 words.

A.50.2. 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.50.3. Menu 01 - e.g. Sales Orders Listing

A.50.4. Menu 02 - e.g. Line Items

A.50.5. Permission Settings

A.50.6. Personalization

A.50.7. 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.50.8. Pricing

A.50.9. Release Note

A.50.10. Roadmap

A.51. Internal Packing Order Applet

A.51.1. Introduction

[150] | *internal_packing_order_applet_logo.png*

This is a simple description of the applet, no more than 100 words.

A.51.2. 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.51.3. Menu 01 - e.g. Sales Orders Listing

A.51.4. Menu 02 - e.g. Line Items

A.51.5. Permission Settings

A.51.6. Personalization

A.51.7. 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.51.8. Pricing

A.51.9. Release Note

A.51.10. Roadmap

A.52. Internal Purchase Requisition Applet

A.52.1. Introduction

This is a simple description of the applet, no more than 100 words.

A.52.2. 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.52.3. Menu 01 - e.g. Sales Orders Listing

A.52.4. Menu 02 - e.g. Line Items

A.52.5. Permission Settings

A.52.6. Personalization

A.52.7. 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.52.8. Pricing

A.52.9. Release Note

A.52.10. Roadmap

A.53. Internal RMA Applet

A.53.1. Introduction

This is a simple description of the applet, no more than 100 words.

A.53.2. 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.53.3. Menu 01 - e.g. Sales Orders Listing

A.53.4. Menu 02 - e.g. Line Items

A.53.5. Permission Settings

A.53.6. Personalization

A.53.7. 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

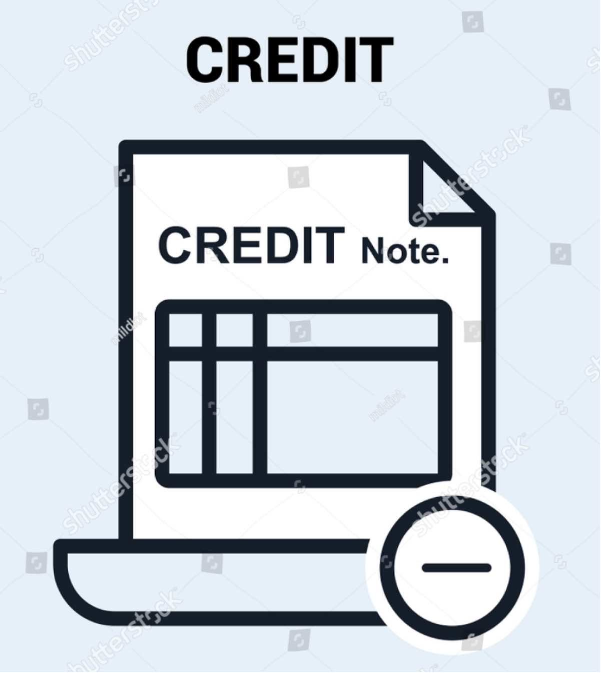
A.53.8. Pricing

A.53.9. Release Note

A.53.10. Roadmap

A.54. Internal Sales Credit Note Applet

A.54.1. Introduction



This is a simple description of the applet, no more than 100 words.

A.54.2. 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.54.3. Menu 01 - e.g. Sales Orders Listing

A.54.4. Menu 02 - e.g. Line Items

A.54.5. Permission Settings

A.54.6. Personalization

A.54.7. 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

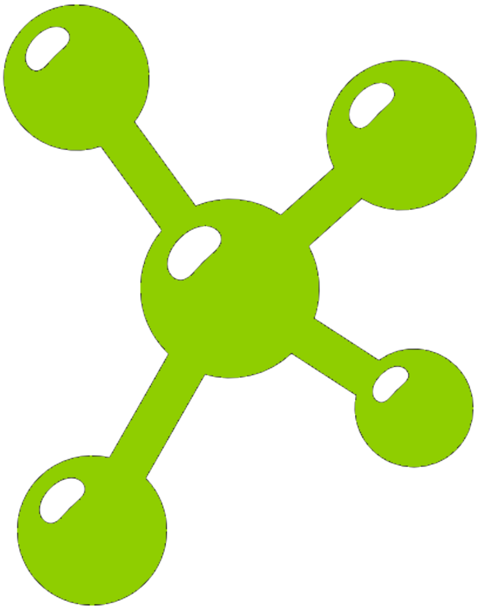
A.54.8. Pricing

A.54.9. Release Note

A.54.10. Roadmap

A.55. Issue Tracker Applet

A.55.1. Introduction



This is a simple description of the applet, no more than 100 words.

A.55.2. 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.55.3. Menu 01 - e.g. Sales Orders Listing

A.55.4. Menu 02 - e.g. Line Items

A.55.5. Permission Settings

A.55.6. Personalization

A.55.7. 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

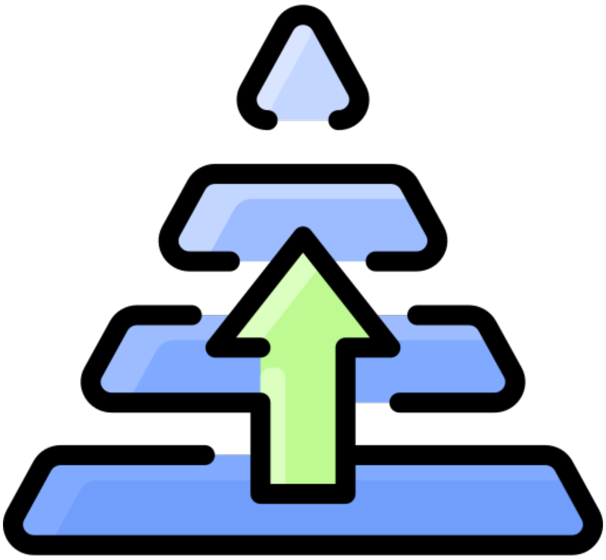
A.55.8. Pricing

A.55.9. Release Note

A.55.10. Roadmap

A.56. MLM Admin Applet

A.56.1. Introduction



This is a simple description of the applet, no more than 100 words.

A.56.2. 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.56.3. Menu 01 - e.g. Sales Orders Listing

A.56.4. Menu 02 - e.g. Line Items

A.56.5. Permission Settings

A.56.6. Personalization

A.56.7. 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.56.8. Pricing

A.56.9. Release Note

A.56.10. Roadmap

A.57. Multi PO Applet

A.57.1. Introduction

This is a simple description of the applet, no more than 100 words.

A.57.2. 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.57.3. Menu 01 - e.g. Sales Orders Listing

A.57.4. Menu 02 - e.g. Line Items

A.57.5. Permission Settings

A.57.6. Personalization

A.57.7. 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.57.8. Pricing

A.57.9. Release Note

A.57.10. Roadmap

A.58. Sales Force Automation Applet

A.58.1. Introduction

This is a simple description of the applet, no more than 100 words.

A.58.2. 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.58.3. Menu 01 - e.g. Sales Orders Listing

A.58.4. Menu 02 - e.g. Line Items

A.58.5. Permission Settings

A.58.6. Personalization

A.58.7. 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.58.8. Pricing

A.58.9. Release Note

A.58.10. Roadmap

A.59. Commision Scheme Applet

A.59.1. Introduction

This is a simple description of the applet, no more than 100 words.

A.59.2. 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.59.3. Menu 01 - e.g. Sales Orders Listing

A.59.4. Menu 02 - e.g. Line Items

A.59.5. Permission Settings

A.59.6. Personalization

A.59.7. 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.59.8. Pricing

A.59.9. Release Note

A.59.10. Roadmap

A.60. Internal Consignor Purchase Billing Applet

A.60.1. Introduction

This is a simple description of the applet, no more than 100 words.

A.60.2. 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.60.3. Menu 01 - e.g. Sales Orders Listing

A.60.4. Menu 02 - e.g. Line Items

A.60.5. Permission Settings

A.60.6. Personalization

A.60.7. 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.60.8. Pricing

A.60.9. Release Note

A.60.10. Roadmap

A.61. Fixed Asset Applet

A.61.1. Introduction

This is a simple description of the applet, no more than 100 words.

A.61.2. 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.61.3. Menu 01 - e.g. Sales Orders Listing

A.61.4. Menu 02 - e.g. Line Items

A.61.5. Permission Settings

A.61.6. Personalization

A.61.7. 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.61.8. Pricing

A.61.9. Release Note

A.61.10. Roadmap

A.62. Named-Applet

A.62.1. Introduction

This is a simple description of the applet, no more than 100 words.

A.62.2. 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.62.3. Menu 01 - e.g. Sales Orders Listing

A.62.4. Menu 02 - e.g. Line Items

A.62.5. Permission Settings

A.62.6. Personalization

A.62.7. 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.62.8. Pricing

A.62.9. Release Note

A.62.10. Roadmap

A.63. Internal Sales Quotation Applet

A.63.1. Introduction

This is a simple description of the applet, no more than 100 words.

A.63.2. 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.63.3. Menu 01 - e.g. Sales Orders Listing

A.63.4. Menu 02 - e.g. Line Items

A.63.5. Permission Settings

A.63.6. Personalization

A.63.7. 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.63.8. Pricing

A.63.9. Release Note

A.63.10. Roadmap

A.64. Merchant Access Applet

A.64.1. Introduction

This is a simple description of the applet, no more than 100 words.

A.64.2. 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.64.3. Menu 01 - e.g. Sales Orders Listing

A.64.4. Menu 02 - e.g. Line Items

A.64.5. Permission Settings

A.64.6. Personalization

A.64.7. 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.64.8. Pricing

A.64.9. Release Note

A.64.10. Roadmap

A.65. OCR Cash Bill Applet

A.65.1. Introduction

This is a simple description of the applet, no more than 100 words.

A.65.2. 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.65.3. Menu 01 - e.g. Sales Orders Listing

A.65.4. Menu 02 - e.g. Line Items

A.65.5. Permission Settings

A.65.6. Personalization

A.65.7. 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.65.8. Pricing

A.65.9. Release Note

A.65.10. Roadmap

A.66. Named-Applet

A.66.1. Introduction

This is a simple description of the applet, no more than 100 words.

A.66.2. 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”
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- Section 4.10, “Contact Center Module”
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- 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.66.3. Menu 01 - e.g. Sales Orders Listing

A.66.4. Menu 02 - e.g. Line Items

A.66.5. Permission Settings

A.66.6. Personalization

A.66.7. 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.66.8. Pricing

A.66.9. Release Note

A.66.10. Roadmap

A.67. Admin Time Attendance Applet

A.67.1. Introduction

This is a simple description of the applet, no more than 100 words.

A.67.2. 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.67.3. Menu 01 - e.g. Sales Orders Listing

A.67.4. Menu 02 - e.g. Line Items

A.67.5. Permission Settings

A.67.6. Personalization

A.67.7. 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.67.8. Pricing

A.67.9. Release Note

A.67.10. Roadmap

A.68. Delivery And Installation Applet

A.68.1. Introduction

This is a simple description of the applet, no more than 100 words.

A.68.2. 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.68.3. Menu 01 - e.g. Sales Orders Listing

A.68.4. Menu 02 - e.g. Line Items

A.68.5. Permission Settings

A.68.6. Personalization

A.68.7. 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.68.8. Pricing

A.68.9. Release Note

A.68.10. Roadmap

A.69. Tenant Applet

A.69.1. Introduction

[150] | *tenant_applet_logo.png*

This is a simple description of the applet, no more than 100 words.

A.69.2. 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.69.3. Menu 01 - e.g. Sales Orders Listing

A.69.4. Menu 02 - e.g. Line Items

A.69.5. Permission Settings

A.69.6. Personalization

A.69.7. 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.69.8. Pricing

A.69.9. Release Note

A.69.10. Roadmap

A.70. Staff Time Attendance Applet

A.70.1. Introduction

This is a simple description of the applet, no more than 100 words.

A.70.2. 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.70.3. Menu 01 - e.g. Sales Orders Listing

A.70.4. Menu 02 - e.g. Line Items

A.70.5. Permission Settings

A.70.6. Personalization

A.70.7. 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.70.8. Pricing

A.70.9. Release Note

A.70.10. Roadmap

A.71. IM MSESD Order Applet

A.71.1. Introduction

This is a simple description of the applet, no more than 100 words.

A.71.2. 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.71.3. Menu 01 - e.g. Sales Orders Listing

A.71.4. Menu 02 - e.g. Line Items

A.71.5. Permission Settings

A.71.6. Personalization

A.71.7. 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.71.8. Pricing

A.71.9. Release Note

A.71.10. Roadmap

A.72. Recurring Sales Invoice Applet

A.72.1. Introduction

This is a simple description of the applet, no more than 100 words.

A.72.2. 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.72.3. Menu 01 - e.g. Sales Orders Listing

A.72.4. Menu 02 - e.g. Line Items

A.72.5. Permission Settings

A.72.6. Personalization

A.72.7. 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.72.8. Pricing

A.72.9. Release Note

A.72.10. Roadmap

A.73. Daily Cashier Applet

A.73.1. Introduction

This is a simple description of the applet, no more than 100 words.

A.73.2. 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.73.3. Menu 01 - e.g. Sales Orders Listing

A.73.4. Menu 02 - e.g. Line Items

A.73.5. Permission Settings

A.73.6. Personalization

A.73.7. 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.73.8. Pricing

A.73.9. Release Note

A.73.10. Roadmap

A.74. Internal Purchase Quotation Applet

A.74.1. Introduction

This is a simple description of the applet, no more than 100 words.

A.74.2. 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.74.3. Menu 01 - e.g. Sales Orders Listing

A.74.4. Menu 02 - e.g. Line Items

A.74.5. Permission Settings

A.74.6. Personalization

A.74.7. 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.74.8. Pricing

A.74.9. Release Note

A.74.10. Roadmap