

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

Table of Contents

1. BigLedger Overview	28
1.1. BigLedger BigPicture	28
1.1.1. Introduction	28
1.1.2. Background	28
2. User Guide	31
2.1. Applet Users	31
2.1.1. Introduction	31
2.2. Project Implementors	33
2.2.1. Introduction	33
2.2.2. Applet-Catalog Maintenance	35
2.2.3. Fictitious Companies	41
2.3. Tenant Owners	43
2.3.1. Tenant Owners	43
2.4. Applet Developers	44
2.4.1. Introduction	44
2.5. Resellers	45
2.5.1. Introduction	45
2.6. System Integrators	46
2.6.1. Introduction	46
2.6.2. Getting Started	48
2.6.3. ETL Endpoints	52
3. Industry Guide	60
3.1. Overview	60
3.1.1. Industry Guide - Introduction	60
3.2. Consumer Electronics Industry	60
3.2.1. Overview	60
3.2.2. Solutions	60
3.2.3. Stories	60
3.2.4. FAQs	60
3.3. Pharmacy Industry	60
3.3.1. Overview	60
3.3.2. Solutions	60
3.3.3. Stories	60
3.3.4. FAQs	60
3.4. Car Workshops	60
3.4.1. Overview	60
3.4.2. Solutions	60
3.4.3. Stories	60

3.4.4. FAQs	61
3.5. Retail Chainstores	61
3.5.1. Overview	61
3.5.2. Solutions	61
3.5.3. Stories	61
3.5.4. FAQs	61
3.6. Logistics Industry	61
3.6.1. Overview	61
3.6.2. Solutions	61
3.6.3. Stories	61
3.6.4. FAQs	61
3.7. Manufacturing Industry	61
3.7.1. Overview	61
3.7.2. Solutions	61
3.7.3. Stories	61
3.7.4. FAQs	61
3.8. Pet Industry	61
3.8.1. Overview	61
3.8.2. Solutions	61
3.8.3. Stories	61
3.8.4. FAQs	62
4. Guide by Modules	63
4.1. Module Guide	63
4.1.1. Introduction	63
4.2. Core Module	63
4.2.1. Introduction	63
4.2.2. Module Name - Unique Value Proposition	64
4.2.3. Core Module - Related Applets	64
4.2.4. Module Name - Project Implementation Steps	64
4.3. Accounting Module	65
4.3.1. Introduction	65
4.3.2. Accounting - Unique Value Proposition	65
4.3.3. Accounting Module - Related Applets	65
4.3.4. Module Name - Project Implementation Steps	66
4.4. Inventory Module	67
4.4.1. Introduction	67
4.4.2. Inventory Module - Unique Value Proposition	67
4.4.3. Inventory Module - Related Applets	67
4.4.4. Inventory Module - Project Implementation Steps	67
4.5. Point of Sales Module	68
4.5.1. Introduction	68

4.5.2. Point of Sales - Unique Value Proposition	69
4.5.3. Point of Sales Module - Related Applets	69
4.5.4. Point of Sales Module - Project Implementation Steps	69
4.6. Manufacturing Module	70
4.6.1. Introduction	70
4.6.2. Manufacturing - Unique Value Proposition	70
4.6.3. Manufacturing - Related Applets	70
4.6.4. Manufacturing - Project Implementation Steps	71
4.7. Membership Module	72
4.7.1. Membership Module Introduction	72
4.7.2. Membership - Unique Value Proposition	72
4.7.3. Membership - Related Applets	72
4.7.4. Membership - Project Implementation Steps	72
4.8. Referral Module	73
4.8.1. Introduction	73
4.8.2. Referral - Unique Value Proposition	74
4.8.3. Referral Module - Related Applets	74
4.8.4. Module Name - Project Implementation Steps	74
4.9. Customer Relationship Management	75
4.9.1. Introduction	75
4.9.2. CRM - Unique Value Proposition	76
4.9.3. CRM - Related Applets	76
4.9.4. CRM - Project Implementation Steps	76
4.10. Contact Center Module	77
4.10.1. Introduction	77
4.10.2. Contact Center - Unique Value Proposition	78
4.10.3. Contact Center - Related Applets	78
4.10.4. Contact Center - Project Implementation Steps	78
4.11. Digital Marketing Module	79
4.11.1. Introduction	79
4.11.2. Digital Marketing - Unique Value Proposition	79
4.11.3. Digital Marketing - Related Applets	80
4.11.4. Digital Marketing - Project Implementation Steps	80
4.12. Marketplace Connector Module	81
4.12.1. Introduction	81
4.12.2. Marketplace Connector - Unique Value Proposition	81
4.12.3. Marketplace Connector - Related Applets	81
4.12.4. Marketplace Connector - Project Implementation Steps	81
4.13. Delivery Fulfillment Module	82
4.13.1. Introduction	82
4.13.2. Delivery Fulfillment - Unique Value Proposition	83

4.13.3. Delivery Fulfillment - Related Applets	83
4.13.4. Delivery Fulfillment - Project Implementation Steps	83
4.14. CP Commerce Module	84
4.14.1. Introduction	84
4.14.2. Project Implementation	85
4.14.3. Content Management System	88
4.14.4. Customer Experience	91
4.14.5. ERP Integration	91
4.14.6. Memberships	92
4.14.7. O2O	92
4.14.8. Payment and Collection	92
4.14.9. Product Maintenance	92
4.14.10. Traffic Generation	93
4.14.11. B2B2C	93
4.14.12. Marketplace Connector	94
4.15. Procure to Pay Module	94
4.15.1. Introduction	94
4.15.2. Procure To Pay - Unique Value Proposition	95
4.15.3. Procure To Pay - Related Applets	95
4.15.4. Procure To Pay - Project Implementation Steps	95
4.16. HR Module	96
4.16.1. Introduction	96
4.17. Order To Cash Module	96
4.17.1. Introduction	96
4.17.2. Order To Cash - Unique Value Proposition	97
4.17.3. Order To Cash - Related Applets	97
4.17.4. Order To Cash - Project Implementation Steps	97
4.18. Warehouse Management Module	98
4.18.1. Introduction	98
4.18.2. Warehouse Management - Unique Value Proposition	98
4.18.3. Warehouse Management - Related Applets	98
4.18.4. Warehouse Management - Project Implementation Steps	98
4.19. Customer Data Platform	99
4.19.1. Introduction	100
4.19.2. Customer Data Platform - Unique Value Proposition	100
4.19.3. Customer Data Platform - Related Applets	100
4.19.4. Customer Data Platform - Project Implementation Steps	100
4.20. PGW Module	101
4.20.1. Introduction	101
4.20.2. Payment Gateway Module - Unique Value Proposition	102
4.20.3. Module Name - Related Applets	102

4.20.4. Module Name - Project Implementation Steps	102
4.21. Chatbot Module	103
4.21.1. Introduction	103
4.21.2. Chatbot - Unique Value Proposition	103
4.21.3. Chatbot - Related Applets	103
4.21.4. Module Name - Project Implementation Steps	103
4.22. Process Automation Module	105
4.22.1. Introduction	105
4.23. Datalake Module	105
4.23.1. Introduction	105
4.23.2. Datalake - Unique Value Proposition	105
4.23.3. Datalake - Related Applets	105
4.23.4. Datalake - Project Implementation Steps	105
5. Technical Guide	107
5.1. Applet Development Guide	107
5.1.1. Introduction	107
5.1.2. Creating a new Applet	107
5.1.3. Deploying applet to s3	107
5.1.4. Developer SysAdmin Applet	107
5.1.5. Example Applet Template	108
5.1.6. Inactive Applet	108
5.1.7. Publishing an Applet	108
5.1.8. Releasing new version of the applets	108
5.1.9. Full Deletion of Applet	108
5.1.10. Quality Control Checklist	109
5.1.11. Support and Maintenance of Applet	109
5.1.12. Suspension of Applet	109
5.1.13. Types of Applet	109
5.1.14. UI Design Guidelines	109
5.1.15. Vendor Account	109
5.1.16. Applet Permission Template	109
5.1.17. Pricing for applets	110
5.1.18. Scheduler for applet	110
5.1.19. Webhooks for Applets	110
5.1.20. Archiving an Applet	110
5.1.21. Client Side Settings	110
5.2. ETL Guide	111
5.2.1. Introduction	111
5.3. Cloud Native Architecture	111
5.3.1. Introduction	111
Glossary	113

Appendix A: Applet Directory	114
A.1. Applet Listing	114
A.1.1. Introduction	114
A.2. Applet Store	114
A.2.1. Introduction	114
A.2.2. Modules	114
A.2.3. Menu 01 - e.g. Sales Orders Listing	115
A.2.4. Menu 02 - e.g. Line Items	115
A.2.5. Permission Settings	115
A.2.6. Personalization	115
A.2.7. Related Applets	115
A.2.8. Pricing	115
A.2.9. Release Note	115
A.2.10. Roadmap	115
A.3. Bank Reconciliation Applet	116
A.3.1. Introduction	116
A.3.2. Modules	116
A.3.3. Menu 01 - e.g. Sales Orders Listing	117
A.3.4. Menu 02 - e.g. Line Items	117
A.3.5. Permission Settings	117
A.3.6. Personalization	117
A.3.7. Related Applets	117
A.3.8. Pricing	117
A.3.9. Release Note	117
A.3.10. Roadmap	117
A.4. Cashbook Applet	117
A.4.1. Introduction	118
A.4.2. Modules	118
A.4.3. Menu 01 - e.g. Sales Orders Listing	119
A.4.4. Menu 02 - e.g. Line Items	119
A.4.5. Permission Settings	119
A.4.6. Personalization	119
A.4.7. Related Applets	119
A.4.8. Pricing	119
A.4.9. Release Note	119
A.4.10. Roadmap	119
A.5. Chart of Account Applet	119
A.5.1. Introduction	119
A.5.2. Modules	120
A.5.3. Menu 01 - e.g. Sales Orders Listing	121
A.5.4. Menu 02 - e.g. Line Items	121

A.5.5. Permission Settings	121
A.5.6. Personalization	121
A.5.7. Related Applets	121
A.5.8. Pricing	121
A.5.9. Release Note	121
A.5.10. Roadmap	121
A.6. CP Commerce Admin Applet	121
A.6.1. Introduction	121
A.6.2. Modules	122
A.6.3. Websites	123
A.6.4. Forms	123
A.6.5. Topics	123
A.6.6. Rating Configuration	123
A.6.7. Template Forms	123
A.6.8. Submitted Forms	123
A.6.9. Spending Limit	123
A.6.10. Blocked Customers	123
A.6.11. Activities	123
A.6.12. Permission Settings	123
A.6.13. Personalization	123
A.6.14. Related Applets	123
A.6.15. Pricing	123
A.6.16. Release Note	123
A.6.17. Roadmap	123
A.7. Customer Maintenance Applet	124
A.7.1. Introduction	124
A.7.2. Modules	124
A.7.3. Menu 01 - e.g. Sales Orders Listing	125
A.7.4. Menu 02 - e.g. Line Items	125
A.7.5. Permission Settings	125
A.7.6. Personalization	125
A.7.7. Related Applets	125
A.7.8. Pricing	125
A.7.9. Release Note	125
A.7.10. Roadmap	125
A.8. Doc Item Maintenance Applet	125
A.8.1. Introduction	125
A.8.2. Modules	126
A.8.3. Menu 01 - Items	127
A.8.4. Menu 02 - Category Groups	146
A.8.5. Menu 03 - Categories	150

A.8.6. Menu 04 - Pricing Schemes	155
A.8.7. Menu 05 - Import Item	158
A.8.8. Menu 06 - Scheduler	161
A.8.9. Menu 08 - Search Filter	163
A.8.10. Permission Settings	164
A.8.11. Personalization	164
A.8.12. Related Applets	164
A.8.13. Pricing	165
A.8.14. Release Note	165
A.8.15. Roadmap	165
A.9. Employee Maintenance Applet	165
A.9.1. Introduction	165
A.9.2. Modules	165
A.9.3. Menu 01 - e.g. Sales Orders Listing	166
A.9.4. Menu 02 - e.g. Line Items	166
A.9.5. Permission Settings	166
A.9.6. Personalization	166
A.9.7. Related Applets	166
A.9.8. Pricing	166
A.9.9. Release Note	166
A.9.10. Roadmap	166
A.10. Entity Maintenance Applet	167
A.10.1. Introduction	167
A.10.2. Modules	167
A.10.3. Menu 01 - e.g. Sales Orders Listing	167
A.10.4. Menu 02 - e.g. Line Items	167
A.10.5. Permission Settings	168
A.10.6. Personalization	168
A.10.7. Related Applets	168
A.10.8. Pricing	168
A.10.9. Release Note	168
A.10.10. Roadmap	168
A.11. Inventory Item Maintenance Applet	168
A.11.1. Introduction	168
A.11.2. Modules	168
A.11.3. Menu 01 - e.g. Sales Orders Listing	169
A.11.4. Menu 02 - e.g. Line Items	169
A.11.5. Permission Settings	169
A.11.6. Personalization	169
A.11.7. Related Applets	169
A.11.8. Pricing	170

A.11.9. Release Note	170
A.11.10. Roadmap	170
A.12. Media Library Applet	170
A.12.1. Introduction	170
A.12.2. Modules	170
A.12.3. Menu 01 - e.g. Sales Orders Listing	171
A.12.4. Menu 02 - e.g. Line Items	171
A.12.5. Permission Settings	171
A.12.6. Personalization	171
A.12.7. Related Applets	171
A.12.8. Pricing	171
A.12.9. Release Note	171
A.12.10. Roadmap	171
A.13. Merchant Admin Maintenance Applet	172
A.13.1. Introduction	172
A.13.2. Modules	172
A.13.3. Menu 01 - e.g. Sales Orders Listing	173
A.13.4. Menu 02 - e.g. Line Items	173
A.13.5. Permission Settings	173
A.13.6. Personalization	173
A.13.7. Related Applets	173
A.13.8. Pricing	173
A.13.9. Release Note	173
A.13.10. Roadmap	173
A.14. Organization Applet	173
A.14.1. Introduction	173
A.14.2. Modules	174
A.14.3. Menu 01 - e.g. Sales Orders Listing	175
A.14.4. Menu 02 - e.g. Line Items	175
A.14.5. Permission Settings	175
A.14.6. Personalization	175
A.14.7. Related Applets	175
A.14.8. Pricing	175
A.14.9. Release Note	175
A.14.10. Roadmap	175
A.15. Payment Channel Applet	175
A.15.1. Introduction	175
A.15.2. Modules	176
A.15.3. Menu 01 - e.g. Sales Orders Listing	177
A.15.4. Menu 02 - e.g. Line Items	177
A.15.5. Permission Settings	177

A.15.6. Personalization	177
A.15.7. Related Applets	177
A.15.8. Pricing	177
A.15.9. Release Note	177
A.15.10. Roadmap	177
A.16. POS - GP	177
A.16.1. Introduction	177
A.16.2. Modules	178
A.16.3. Menu 01 - e.g. Sales Orders Listing	179
A.16.4. Menu 02 - e.g. Line Items	179
A.16.5. Permission Settings	179
A.16.6. Personalization	179
A.16.7. Related Applets	179
A.16.8. Pricing	179
A.16.9. Release Note	179
A.16.10. Roadmap	179
A.17. Stock Take V2 Applet	179
A.17.1. Introduction	179
A.17.2. Modules	180
A.17.3. Menu 01 - Stock Take Session	181
A.17.4. Menu 02 - Devices	189
A.17.5. Menu 03 - Reports	191
A.17.6. Permission Settings	192
A.17.7. Personalization	192
A.17.8. Related Applets	192
A.17.9. Pricing	193
A.17.10. Release Note	193
A.17.11. Roadmap	193
A.18. Supplier Maintenance Applet	193
A.18.1. Introduction	193
A.18.2. Modules	193
A.18.3. Menu 01 - e.g. Sales Orders Listing	194
A.18.4. Menu 02 - e.g. Line Items	194
A.18.5. Permission Settings	194
A.18.6. Personalization	194
A.18.7. Related Applets	194
A.18.8. Pricing	194
A.18.9. Release Note	194
A.18.10. Roadmap	194
A.19. Tax Configuration Applet	195
A.19.1. Introduction	195

A.19.2. Modules	195
A.19.3. Menu 01 - e.g. Sales Orders Listing	196
A.19.4. Menu 02 - e.g. Line Items	196
A.19.5. Permission Settings	196
A.19.6. Personalization	196
A.19.7. Related Applets	196
A.19.8. Pricing	196
A.19.9. Release Note	196
A.19.10. Roadmap	196
A.20. UCC Applet	196
A.20.1. Introduction	196
A.20.2. Modules	197
A.20.3. Menu 01 - Inbox	198
A.20.4. Menu 02 - Dashboard	202
A.20.5. Menu 03 - My Profile	203
A.20.6. Menu 04 - Contacts	204
A.20.7. Menu 05 - Broadcast	205
A.20.8. Menu 06 - Task Queue	205
A.20.9. Menu 07 - Configuration	207
A.20.10. Menu 08 - Settings	223
A.20.11. Menu 09 - Personalization	231
A.20.12. Implementation	232
A.20.13. General Requirement	269
A.20.14. Admin Access Setup	270
A.20.15. Related Applets	283
A.20.16. Pricing	283
A.20.17. Release Note	283
A.20.18. Roadmap	283
A.21. URL Shortening Applet	283
A.21.1. Introduction	283
A.21.2. Modules	284
A.21.3. Menu 01 - e.g. Sales Orders Listing	285
A.21.4. Menu 02 - e.g. Line Items	285
A.21.5. Permission Settings	285
A.21.6. Personalization	285
A.21.7. Related Applets	285
A.21.8. Pricing	285
A.21.9. Release Note	285
A.21.10. Roadmap	285
A.22. Platform SysAdmin Applet	285
A.22.1. Introduction	285

A.22.2. Modules	286
A.22.3. Menu 01 - e.g. Sales Orders Listing	287
A.22.4. Menu 02 - e.g. Line Items	287
A.22.5. Permission Settings	287
A.22.6. Personalization	287
A.22.7. Related Applets	287
A.22.8. Pricing	287
A.22.9. Release Note	287
A.22.10. Roadmap	287
A.23. Developer SysAdmin Applet	287
A.23.1. Introduction	287
A.23.2. Modules	288
A.23.3. Menu 01 - e.g. Sales Orders Listing	289
A.23.4. Menu 02 - e.g. Line Items	289
A.23.5. Permission Settings	289
A.23.6. Personalization	289
A.23.7. Related Applets	289
A.23.8. Pricing	289
A.23.9. Release Note	289
A.23.10. Roadmap	289
A.24. Developer Applet	289
A.24.1. Introduction	289
A.24.2. Modules	290
A.24.3. Menu 01 - e.g. Sales Orders Listing	291
A.24.4. Menu 02 - e.g. Line Items	291
A.24.5. Permission Settings	291
A.24.6. Personalization	291
A.24.7. Related Applets	291
A.24.8. Pricing	291
A.24.9. Release Note	291
A.24.10. Roadmap	291
A.25. Financial Report Applet	291
A.25.1. Introduction	291
A.25.2. Modules	292
A.25.3. Menu 01 - e.g. Sales Orders Listing	293
A.25.4. Menu 02 - e.g. Line Items	293
A.25.5. Permission Settings	293
A.25.6. Personalization	293
A.25.7. Related Applets	293
A.25.8. Pricing	293
A.25.9. Release Note	293

A.25.10. Roadmap	293
A.26. Beauty Pos Applet	293
A.26.1. Introduction	293
A.26.2. Modules	294
A.26.3. Menu 01 - e.g. Sales Orders Listing	295
A.26.4. Menu 02 - e.g. Line Items	295
A.26.5. Permission Settings	295
A.26.6. Personalization	295
A.26.7. Related Applets	295
A.26.8. Pricing	295
A.26.9. Release Note	295
A.26.10. Roadmap	295
A.27. Process Monitoring Applet	295
A.27.1. Introduction	295
A.27.2. Modules	296
A.27.3. Menu 01 - e.g. Sales Orders Listing	297
A.27.4. Menu 02 - e.g. Line Items	297
A.27.5. Permission Settings	297
A.27.6. Personalization	297
A.27.7. Related Applets	297
A.27.8. Pricing	297
A.27.9. Release Note	297
A.27.10. Roadmap	297
A.28. Internal Stock Transfer Applet	297
A.28.1. Introduction	297
A.28.2. Modules	298
A.28.3. Menu 01 - e.g. Sales Orders Listing	299
A.28.4. Menu 02 - e.g. Line Items	299
A.28.5. Permission Settings	299
A.28.6. Personalization	299
A.28.7. Related Applets	299
A.28.8. Pricing	299
A.28.9. Release Note	299
A.28.10. Roadmap	299
A.29. Internal Sales Return Applet	299
A.29.1. Introduction	299
A.29.2. Modules	300
A.29.3. Menu 01 - e.g. Sales Orders Listing	301
A.29.4. Menu 02 - e.g. Line Items	301
A.29.5. Permission Settings	301
A.29.6. Personalization	301

A.29.7. Related Applets	301
A.29.8. Pricing	301
A.29.9. Release Note	301
A.29.10. Roadmap	301
A.30. Internal Receipt Voucher Applet	301
A.30.1. Introduction	301
A.30.2. Modules	302
A.30.3. Menu 01 - e.g. Sales Orders Listing	303
A.30.4. Menu 02 - e.g. Line Items	303
A.30.5. Permission Settings	303
A.30.6. Personalization	303
A.30.7. Related Applets	303
A.30.8. Pricing	303
A.30.9. Release Note	303
A.30.10. Roadmap	303
A.31. Internal Purchase Order Applet	303
A.31.1. Introduction	303
A.31.2. Modules	304
A.31.3. Menu 01 - e.g. Sales Orders Listing	305
A.31.4. Menu 02 - e.g. Line Items	305
A.31.5. Permission Settings	305
A.31.6. Personalization	305
A.31.7. Related Applets	305
A.31.8. Pricing	305
A.31.9. Release Note	305
A.31.10. Roadmap	305
A.32. Internal Purchase Invoice Applet	305
A.32.1. Introduction	305
A.32.2. Modules	306
A.32.3. Menu 01 - e.g. Sales Orders Listing	307
A.32.4. Menu 02 - e.g. Line Items	307
A.32.5. Permission Settings	307
A.32.6. Personalization	307
A.32.7. Related Applets	307
A.32.8. Pricing	307
A.32.9. Release Note	307
A.32.10. Roadmap	307
A.33. Group Maintenance Applet	307
A.33.1. Introduction	307
A.33.2. Modules	308
A.33.3. Menu 01 - e.g. Sales Orders Listing	309

A.33.4. Menu 02 - e.g. Line Items	309
A.33.5. Permission Settings	309
A.33.6. Personalization	309
A.33.7. Related Applets	309
A.33.8. Pricing	309
A.33.9. Release Note	309
A.33.10. Roadmap	309
A.34. Internal Purchase GRN Applet	309
A.34.1. Introduction	309
A.34.2. Modules	310
A.34.3. Menu 01 - e.g. Sales Orders Listing	311
A.34.4. Menu 02 - e.g. Line Items	311
A.34.5. Permission Settings	311
A.34.6. Personalization	311
A.34.7. Related Applets	311
A.34.8. Pricing	311
A.34.9. Release Note	311
A.34.10. Roadmap	311
A.35. Internal Payment Voucher Applet	311
A.35.1. Introduction	311
A.35.2. Modules	312
A.35.3. Menu 01 - e.g. Sales Orders Listing	313
A.35.4. Menu 02 - e.g. Line Items	313
A.35.5. Permission Settings	313
A.35.6. Personalization	313
A.35.7. Related Applets	313
A.35.8. Pricing	313
A.35.9. Release Note	313
A.35.10. Roadmap	313
A.36. Internal Sales Invoice Applet	313
A.36.1. Introduction	313
A.36.2. Modules	314
A.36.3. Menu 01 - e.g. Sales Orders Listing	315
A.36.4. Menu 02 - e.g. Line Items	315
A.36.5. Permission Settings	315
A.36.6. Personalization	315
A.36.7. Related Applets	315
A.36.8. Pricing	315
A.36.9. Release Note	315
A.36.10. Roadmap	315
A.37. Internal Sales Order Applet	315

A.37.1. Introduction	315
A.37.2. Modules	316
A.37.3. Menu 01 - e.g. Sales Orders Listing	317
A.37.4. Menu 02 - e.g. Line Items	317
A.37.5. Permission Settings	317
A.37.6. Personalization	317
A.37.7. Related Applets	317
A.37.8. Pricing	317
A.37.9. Release Note	317
A.37.10. Roadmap	317
A.38. Internal Purchase Credit Note Applet	317
A.38.1. Introduction	317
A.38.2. Modules	318
A.38.3. Menu 01 - e.g. Sales Orders Listing	319
A.38.4. Menu 02 - e.g. Line Items	319
A.38.5. Permission Settings	319
A.38.6. Personalization	319
A.38.7. Related Applets	319
A.38.8. Pricing	319
A.38.9. Release Note	319
A.38.10. Roadmap	319
A.39. Internal Purchase Debit Note Applet	319
A.39.1. Introduction	319
A.39.2. Modules	320
A.39.3. Menu 01 - e.g. Sales Orders Listing	321
A.39.4. Menu 02 - e.g. Line Items	321
A.39.5. Permission Settings	321
A.39.6. Personalization	321
A.39.7. Related Applets	321
A.39.8. Pricing	321
A.39.9. Release Note	321
A.39.10. Roadmap	321
A.40. Internal Sales Debit Note Applet	321
A.40.1. Introduction	321
A.40.2. Modules	322
A.40.3. Menu 01 - e.g. Sales Orders Listing	323
A.40.4. Menu 02 - e.g. Line Items	323
A.40.5. Permission Settings	323
A.40.6. Personalization	323
A.40.7. Related Applets	323
A.40.8. Pricing	323

A.40.9. Release Note	323
A.40.10. Roadmap	323
A.41. Internal Job Sheet Applet.....	323
A.41.1. Introduction	323
A.41.2. Modules	324
A.41.3. Menu 01 - e.g. Sales Orders Listing	325
A.41.4. Menu 02 - e.g. Line Items	325
A.41.5. Permission Settings	325
A.41.6. Personalization	325
A.41.7. Related Applets	325
A.41.8. Pricing	325
A.41.9. Release Note	325
A.41.10. Roadmap	325
A.42. Ledger and Journal Applet.....	325
A.42.1. Introduction	325
A.42.2. Modules	326
A.42.3. Menu 01 - e.g. Sales Orders Listing	327
A.42.4. Menu 02 - e.g. Line Items	327
A.42.5. Permission Settings	327
A.42.6. Personalization	327
A.42.7. Related Applets	327
A.42.8. Pricing	327
A.42.9. Release Note	327
A.42.10. Roadmap	327
A.43. Membership Admin Applet.....	327
A.43.1. Introduction	327
A.43.2. Modules	328
A.43.3. Menu 01 - e.g. Sales Orders Listing	329
A.43.4. Menu 02 - e.g. Line Items	329
A.43.5. Permission Settings	329
A.43.6. Personalization	329
A.43.7. Related Applets	329
A.43.8. Pricing	329
A.43.9. Release Note	329
A.43.10. Roadmap	329
A.44. Internal Sale Proforma Applet.....	329
A.44.1. Introduction	329
A.44.2. Modules	330
A.44.3. Menu 01 - e.g. Sales Orders Listing	331
A.44.4. Menu 02 - e.g. Line Items	331
A.44.5. Permission Settings	331

A.44.6. Personalization	331
A.44.7. Related Applets	331
A.44.8. Pricing	331
A.44.9. Release Note	331
A.44.10. Roadmap	331
A.45. Pricebook Applet	331
A.45.1. Introduction	331
A.45.2. Modules	332
A.45.3. Menu 01 - e.g. Sales Orders Listing	333
A.45.4. Menu 02 - e.g. Line Items	333
A.45.5. Permission Settings	333
A.45.6. Personalization	333
A.45.7. Related Applets	333
A.45.8. Pricing	333
A.45.9. Release Note	333
A.45.10. Roadmap	333
A.46. Internal Shopping Cart Applet	333
A.46.1. Introduction	333
A.46.2. Modules	334
A.46.3. Menu 01 - e.g. Sales Orders Listing	335
A.46.4. Menu 02 - e.g. Line Items	335
A.46.5. Permission Settings	335
A.46.6. Personalization	335
A.46.7. Related Applets	335
A.46.8. Pricing	335
A.46.9. Release Note	335
A.46.10. Roadmap	335
A.47. Internal Stock Adjustment Applet	335
A.47.1. Introduction	335
A.47.2. Modules	335
A.47.3. Menu 01 - e.g. Sales Orders Listing	336
A.47.4. Menu 02 - e.g. Line Items	336
A.47.5. Permission Settings	336
A.47.6. Personalization	336
A.47.7. Related Applets	336
A.47.8. Pricing	337
A.47.9. Release Note	337
A.47.10. Roadmap	337
A.48. Stock Availability Applet	337
A.48.1. Introduction	337
A.48.2. Modules	337

A.48.3. Menu 01 - e.g. Sales Orders Listing	338
A.48.4. Menu 02 - e.g. Line Items	338
A.48.5. Permission Settings	338
A.48.6. Personalization	338
A.48.7. Related Applets	338
A.48.8. Pricing	338
A.48.9. Release Note	338
A.48.10. Roadmap	338
A.49. Stock Balance Applet	338
A.49.1. Introduction	339
A.49.2. Modules	339
A.49.3. Menu 01 - e.g. Sales Orders Listing	339
A.49.4. Menu 02 - e.g. Line Items	339
A.49.5. Permission Settings	339
A.49.6. Personalization	339
A.49.7. Related Applets	340
A.49.8. Pricing	340
A.49.9. Release Note	340
A.49.10. Roadmap	340
A.50. Internal Delivery Order Applet	340
A.50.1. Introduction	340
A.50.2. Modules	340
A.50.3. Menu 01 - e.g. Sales Orders Listing	341
A.50.4. Menu 02 - e.g. Line Items	341
A.50.5. Permission Settings	341
A.50.6. Personalization	341
A.50.7. Related Applets	341
A.50.8. Pricing	342
A.50.9. Release Note	342
A.50.10. Roadmap	342
A.51. Internal Packing Order Applet	342
A.51.1. Introduction	342
A.51.2. Modules	342
A.51.3. Menu 01 - e.g. Sales Orders Listing	343
A.51.4. Menu 02 - e.g. Line Items	343
A.51.5. Permission Settings	343
A.51.6. Personalization	343
A.51.7. Related Applets	343
A.51.8. Pricing	343
A.51.9. Release Note	343
A.51.10. Roadmap	343

A.52. Internal Purchase Requisition Applet	343
A.52.1. Introduction	343
A.52.2. Modules	344
A.52.3. Menu 01 - e.g. Sales Orders Listing	345
A.52.4. Menu 02 - e.g. Line Items	345
A.52.5. Permission Settings	345
A.52.6. Personalization	345
A.52.7. Related Applets	345
A.52.8. Pricing	345
A.52.9. Release Note	345
A.52.10. Roadmap	345
A.53. Internal RMA Applet	345
A.53.1. Introduction	345
A.53.2. Modules	346
A.53.3. Menu 01 - e.g. Sales Orders Listing	347
A.53.4. Menu 02 - e.g. Line Items	347
A.53.5. Permission Settings	347
A.53.6. Personalization	347
A.53.7. Related Applets	347
A.53.8. Pricing	347
A.53.9. Release Note	347
A.53.10. Roadmap	347
A.54. Internal Sales Credit Note Applet	347
A.54.1. Introduction	347
A.54.2. Modules	348
A.54.3. Menu 01 - e.g. Sales Orders Listing	349
A.54.4. Menu 02 - e.g. Line Items	349
A.54.5. Permission Settings	349
A.54.6. Personalization	349
A.54.7. Related Applets	349
A.54.8. Pricing	349
A.54.9. Release Note	349
A.54.10. Roadmap	349
A.55. Issue Tracker Applet	349
A.55.1. Introduction	349
A.55.2. Modules	350
A.55.3. Menu 01 - e.g. Sales Orders Listing	351
A.55.4. Menu 02 - e.g. Line Items	351
A.55.5. Permission Settings	351
A.55.6. Personalization	351
A.55.7. Related Applets	351

A.55.8. Pricing	351
A.55.9. Release Note	351
A.55.10. Roadmap	351
A.56. MLM Admin Applet	351
A.56.1. Introduction	351
A.56.2. Modules	352
A.56.3. Menu 01 - e.g. Sales Orders Listing	353
A.56.4. Menu 02 - e.g. Line Items	353
A.56.5. Permission Settings	353
A.56.6. Personalization	353
A.56.7. Related Applets	353
A.56.8. Pricing	353
A.56.9. Release Note	353
A.56.10. Roadmap	353
A.57. Multi PO Applet	353
A.57.1. Introduction	353
A.57.2. Modules	354
A.57.3. Menu 01 - e.g. Sales Orders Listing	355
A.57.4. Menu 02 - e.g. Line Items	355
A.57.5. Permission Settings	355
A.57.6. Personalization	355
A.57.7. Related Applets	355
A.57.8. Pricing	355
A.57.9. Release Note	355
A.57.10. Roadmap	355
A.58. Sales Force Automation Applet	355
A.58.1. Introduction	355
A.58.2. Modules	356
A.58.3. Menu 01 - e.g. Sales Orders Listing	357
A.58.4. Menu 02 - e.g. Line Items	357
A.58.5. Permission Settings	357
A.58.6. Personalization	357
A.58.7. Related Applets	357
A.58.8. Pricing	357
A.58.9. Release Note	357
A.58.10. Roadmap	357
A.59. Commision Scheme Applet	357
A.59.1. Introduction	357
A.59.2. Modules	358
A.59.3. Menu 01 - e.g. Sales Orders Listing	359
A.59.4. Menu 02 - e.g. Line Items	359

A.59.5. Permission Settings	359
A.59.6. Personalization	359
A.59.7. Related Applets	359
A.59.8. Pricing	359
A.59.9. Release Note	359
A.59.10. Roadmap	359
A.60. Internal Consignor Purchase Billing Applet	359
A.60.1. Introduction	359
A.60.2. Modules	360
A.60.3. Menu 01 - e.g. Sales Orders Listing	361
A.60.4. Menu 02 - e.g. Line Items	361
A.60.5. Permission Settings	361
A.60.6. Personalization	361
A.60.7. Related Applets	361
A.60.8. Pricing	361
A.60.9. Release Note	361
A.60.10. Roadmap	361
A.61. Fixed Asset Applet	361
A.61.1. Introduction	361
A.61.2. Modules	362
A.61.3. Menu 01 - e.g. Sales Orders Listing	363
A.61.4. Menu 02 - e.g. Line Items	363
A.61.5. Permission Settings	363
A.61.6. Personalization	363
A.61.7. Related Applets	363
A.61.8. Pricing	363
A.61.9. Release Note	363
A.61.10. Roadmap	363
A.62. Named-Applet	363
A.62.1. Introduction	363
A.62.2. Modules	364
A.62.3. Menu 01 - e.g. Sales Orders Listing	364
A.62.4. Menu 02 - e.g. Line Items	364
A.62.5. Permission Settings	364
A.62.6. Personalization	364
A.62.7. Related Applets	365
A.62.8. Pricing	365
A.62.9. Release Note	365
A.62.10. Roadmap	365
A.63. Internal Sales Quotation Applet	365
A.63.1. Introduction	365

A.63.2. Modules	365
A.63.3. Menu 01 - e.g. Sales Orders Listing	366
A.63.4. Menu 02 - e.g. Line Items	366
A.63.5. Permission Settings	366
A.63.6. Personalization	366
A.63.7. Related Applets	366
A.63.8. Pricing	367
A.63.9. Release Note	367
A.63.10. Roadmap	367
A.64. Merchant Access Applet	367
A.64.1. Introduction	367
A.64.2. Modules	367
A.64.3. Menu 01 - e.g. Sales Orders Listing	368
A.64.4. Menu 02 - e.g. Line Items	368
A.64.5. Permission Settings	368
A.64.6. Personalization	368
A.64.7. Related Applets	368
A.64.8. Pricing	368
A.64.9. Release Note	368
A.64.10. Roadmap	368
A.65. OCR Cash Bill Applet	368
A.65.1. Introduction	369
A.65.2. Modules	369
A.65.3. Menu 01 - e.g. Sales Orders Listing	370
A.65.4. Menu 02 - e.g. Line Items	370
A.65.5. Permission Settings	370
A.65.6. Personalization	370
A.65.7. Related Applets	370
A.65.8. Pricing	370
A.65.9. Release Note	370
A.65.10. Roadmap	370
A.66. Named-Applet	370
A.66.1. Introduction	370
A.66.2. Modules	371
A.66.3. Menu 01 - e.g. Sales Orders Listing	372
A.66.4. Menu 02 - e.g. Line Items	372
A.66.5. Permission Settings	372
A.66.6. Personalization	372
A.66.7. Related Applets	372
A.66.8. Pricing	372
A.66.9. Release Note	372

A.66.10. Roadmap	372
A.67. Admin Time Attendance Applet.....	372
A.67.1. Introduction	372
A.67.2. Modules	373
A.67.3. Menu 01 - e.g. Sales Orders Listing	374
A.67.4. Menu 02 - e.g. Line Items	374
A.67.5. Permission Settings	374
A.67.6. Personalization.....	374
A.67.7. Related Applets.....	374
A.67.8. Pricing.....	374
A.67.9. Release Note	374
A.67.10. Roadmap	374
A.68. Delivery And Installation Applet.....	374
A.68.1. Introduction	374
A.68.2. Modules	375
A.68.3. Menu 01 - e.g. Sales Orders Listing	376
A.68.4. Menu 02 - e.g. Line Items	376
A.68.5. Permission Settings	376
A.68.6. Personalization.....	376
A.68.7. Related Applets.....	376
A.68.8. Pricing.....	376
A.68.9. Release Note	376
A.68.10. Roadmap	376
A.69. Tenant Applet	376
A.69.1. Introduction	376
A.69.2. Modules	376
A.69.3. Menu 01 - e.g. Sales Orders Listing	377
A.69.4. Menu 02 - e.g. Line Items	377
A.69.5. Permission Settings	377
A.69.6. Personalization.....	377
A.69.7. Related Applets.....	377
A.69.8. Pricing.....	378
A.69.9. Release Note	378
A.69.10. Roadmap	378
A.70. Staff Time Attendance Applet.....	378
A.70.1. Introduction	378
A.70.2. Modules	378
A.70.3. Menu 01 - e.g. Sales Orders Listing	379
A.70.4. Menu 02 - e.g. Line Items	379
A.70.5. Permission Settings	379
A.70.6. Personalization.....	379

A.70.7. Related Applets	379
A.70.8. Pricing	379
A.70.9. Release Note	379
A.70.10. Roadmap	379
A.71. IM MSES Order Applet	379
A.71.1. Introduction	380
A.71.2. Modules	380
A.71.3. Menu 01 - e.g. Sales Orders Listing	381
A.71.4. Menu 02 - e.g. Line Items	381
A.71.5. Permission Settings	381
A.71.6. Personalization	381
A.71.7. Related Applets	381
A.71.8. Pricing	381
A.71.9. Release Note	381
A.71.10. Roadmap	381
A.72. Recurring Sales Invoice Applet	381
A.72.1. Introduction	381
A.72.2. Modules	382
A.72.3. Menu 01 - e.g. Sales Orders Listing	383
A.72.4. Menu 02 - e.g. Line Items	383
A.72.5. Permission Settings	383
A.72.6. Personalization	383
A.72.7. Related Applets	383
A.72.8. Pricing	383
A.72.9. Release Note	383
A.72.10. Roadmap	383
A.73. Daily Cashier Applet	383
A.73.1. Introduction	383
A.73.2. Modules	384
A.73.3. Menu 01 - e.g. Sales Orders Listing	385
A.73.4. Menu 02 - e.g. Line Items	385
A.73.5. Permission Settings	385
A.73.6. Personalization	385
A.73.7. Related Applets	385
A.73.8. Pricing	385
A.73.9. Release Note	385
A.73.10. Roadmap	385
A.74. Internal Purchase Quotation Applet	385
A.74.1. Introduction	385
A.74.2. Modules	386
A.74.3. Menu 01 - e.g. Sales Orders Listing	387

A.74.4. Menu 02 - e.g. Line Items	387
A.74.5. Permission Settings	387
A.74.6. Personalization	387
A.74.7. Related Applets	387
A.74.8. Pricing	387
A.74.9. Release Note	387
A.74.10. Roadmap	387

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

==

1.1.1.3. Downloads

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

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

1.1.2. Background

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

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

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

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



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



Chapter 2. User Guide

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

2.1. Applet Users

2.1.1. Introduction

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

2.1.1.1. Your AkaunID

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

2.1.1.2. The Production, Staging and Development Environment

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

= | Environment | URL | Custom Domain | Description

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

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

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

=

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

2.1.1.3. Understanding Root vs Tenant

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

=

| Rank of a user in a Tenant | Description

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

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

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

| =

2.1.1.4. The Applet Store

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

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

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

2.2. Project Implementors

2.2.1. Introduction

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

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

2.2.1.1. Subscription setup in Akaun Platform

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

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

2.2.1.2. Tenant setup in Akaun Platform

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

Please email jira-mis@wavelet.net 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 ,	* 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.
* 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 ,		

Example Applet-Catalog for ABC Consumer Electronics Division management

Applet List	User List	Remarks
<p>* Organization Applet Rank: ADMIN , Tenant: abc-main , Edition: Default , Addons : n/a ,</p> <p>* Financial Report Applet Rank: ADMIN , Tenant: abc-main , Edition: Default , Addons : n/a ,</p>	<p>* abc-ce-retail-director-01 , * abc-ce-retail-director-02 ,</p>	<p>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.</p>

Example Applet-Catalog for ABC Pharmacy Division management

Applet List	User List	Remarks
<p>* Organization Applet Rank: ADMIN , Tenant: abc-pharmacy , Edition: Default , Addons : n/a ,</p> <p>* Financial Report Applet Rank: ADMIN , Tenant: abc-pharmacy+ Edition: Default , Addons : n/a ,</p>	<p>* abc-pharmacy-director-01 , * abc-pharmacy-director-02 , * abc-pharmacy-director-03 ,</p>	<p>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.</p>

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

Applet List	User List	Remarks
<p>* Organization Applet Rank: ADMIN , Tenant: abc-main , Edition: Default , Addons : n/a ,</p>	<p>* abc-ce-finance-manager-01 , * abc-ce-finance-manager-02 ,</p>	<p>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.</p>
<p>* Financial Report Applet Rank: ADMIN , Tenant: abc-main , Edition: Default , Addons : n/a ,</p>		
<p>* Tax Configuration Applet Rank: OWNER , Tenant: abc-main , Edition: Default , Addons : n/a ,</p>		
<p>* Chart of Account Applet Rank: OWNER , Tenant: abc-main , Edition: Default , Addons : n/a ,</p>		
<p>* Cashbook Applet Rank: OWNER , Tenant: abc-main , Edition: Default , Addons : n/a ,</p>		
<p>* Entity Maintenance Applet Rank: OWNER , Tenant: abc-main , Edition: Default , Addons : n/a ,</p>		
<p>* Employee Maintenance Applet Rank: OWNER , Tenant: abc-main , Edition: Default , Addons : n/a ,</p>		
<p>* Bank Reconciliation Applet Rank: OWNER , Tenant: abc-main , Edition: Default , Addons : Auto-Match</p>		

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

Applet List	User List	Remarks
<p>* Tax Configuration Applet Rank: ADMIN , Tenant: abc-main , Edition: Default , Addons : n/a ,</p>	<p>* abc-ce-finance-exec-01 , * abc-ce-finance-exec-02 ,</p>	<p>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.</p>
<p>* Chart of Account Applet Rank: ADMIN , Tenant: abc-main , Edition: Default , Addons : n/a ,</p>		
<p>* Doc Item Maintenance Applet Rank: ADMIN , Tenant: abc-main , Edition: Default , Addons : n/a ,</p>		
<p>* Cashbook Applet Rank: ADMIN , Tenant: abc-main , Edition: Default , Addons : n/a ,</p>		
<p>* Inventory Item Maintenance Applet Rank: ADMIN , Tenant: abc-main , Edition: Default , Addons : n/a ,</p>		
<p>* Entity Maintenance Applet Rank: ADMIN , Tenant: abc-main , Edition: Default , Addons : n/a ,</p>		
<p>* Employee Maintenance Applet Rank: ADMIN , Tenant: abc-main , Edition: Default , Addons : n/a ,</p>		
<p>* Bank Reconciliation Applet Rank: MEMBER , Tenant: abc-main , Edition: Default , Addons : Auto-Match</p>		
<p>* Internal Payment Voucher Applet Rank: MEMBER , Tenant: abc-main , Edition: Default , Addons : FPX-Integration</p>		

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

Applet List	User List	Remarks
<p>* Doc Item Maintenance Applet Rank: MEMBER , Tenant: abc-main , Edition: Default , Addons : n/a ,</p>	<p>* abc-ce-hq-ops-manager-01 , * abc-ce-hq-ops-manager-02 ,</p>	<p>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.</p>
<p>* Customer Maintenance Applet Rank: ADMIN , Tenant: abc-main , Edition: Default , Addons : n/a ,</p>		
<p>* POS - General Applet Rank: ADMIN , Tenant: abc-main , Edition: Default , Addons : n/a ,</p>		
<p>* Internal Sales Order Applet Rank: ADMIN , Tenant: abc-main , Edition: Default , Addons : n/a ,</p>		
<p>* Inventory Item Maintenance Applet Rank: ADMIN , Tenant: abc-main , Edition: Default , Addons : n/a ,</p>		
<p>* Doc Item Maintenance Applet Rank: MEMBER , Tenant: abc-main , Edition: Default , Addons : n/a ,</p>		
<p>* Internal Purchase Order Applet Rank: ADMIN , Tenant: abc-main , Edition: Default , Addons : n/a ,</p>		
<p>* Report - Daily Sales Applet Rank: ADMIN , Tenant: abc-main , Edition: Default , Addons : n/a ,</p>		

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

Applet List	User List	Remarks
<p>* Doc Item Maintenance Applet Rank: MEMBER, Tenant: abc-main , Edition: Default , Addons : n/a ,</p> <p>* Customer Maintenance Applet Rank: MEMBER, Tenant: abc-main , Edition: Default , Addons : n/a ,</p> <p>* POS - General Applet Rank: MEMBER, Tenant: abc-main , Edition: Default , Addons : n/a ,</p> <p>* Internal Sales Order Applet Rank: MEMBER, Tenant: abc-main , Edition: Default , Addons : n/a ,</p> <p>* Inventory Item Maintenance Applet Rank: MEMBER, Tenant: abc-main , Edition: Default , Addons : n/a ,</p> <p>* Doc Item Maintenance Applet Rank: MEMBER, Tenant: abc-main , Edition: Default , Addons : n/a ,</p> <p>* Report - Daily Cashier Report Applet Rank: MEMBER, Tenant: abc-main , Edition: Default , Addons : n/a ,</p>	<p>* abc-ce-hq-branch-cashier-01 , * abc-ce-hq-branch-cashier-02 ,</p>	<p>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.</p>

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 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:

The image shows two screenshots of the akaun platform interface. The top screenshot displays the launchpad panel with a search bar and navigation icons. The bottom screenshot shows the 'Personal Information' section of the user profile applet, specifically the 'Access Key/ID' tab. A modal window titled 'Add Access Key' is open, prompting for 'Access Key Label' (with a note 'For labelling purpose(can be anything)'), 'Access Key Type' (with a note 'Type is optional'), and 'Expiration Date' (with a note 'Expiration date is optional').

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 “LocalStorage” under “Storage” tag

The screenshot shows the Chrome DevTools interface with the "Storage" tab selected. The left sidebar lists storage types: Cache Storage, Cookies, Indexed DB, Local Storage, and Session Storage. The Local Storage section for the domain <https://akaun.dev> is highlighted with a green box. The main pane displays the contents of the Local Storage, which includes three items: authToken, email, and guid. The authToken item has its value redacted with a long green bar.

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

Using the “System Integration Applet”

Example of frequently used APIs

a. Product API

b. Customer API

c. Sales Order API

2.6.2.4. Understanding Triggers and Web hooks

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

Webhooks

a. Briefing on webhook

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

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

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

2.6.2.5. Virtual ETL Applet

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

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

2.6.3. ETL Endpoints

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

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

2.6.3.1. Financial Item API

These links are documentation on sales order api

- bl_fi_mst_item_hdr
 - consist of details of the item
 - the child item of the group item is considered as single item(basic_item)
- bl_fi_mst_item_ext
 - this table store extra information which not stored in header or line
- bl_fi_mst_item_line

- this table to store the child item after the child item being created in header table as single product. It is to link child item to specific group product.

Create Financial Item

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

Update Financial Item

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

Get all Financial Item

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

Get Financial Item by Guid

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

Get Financial Item by Criteria

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

Delete Financial Item

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

Get All Financial Item Extension

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

Create Financial Item Extension

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

Update Financial Item Extension

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

Get Financial Item Extension By Guid

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

Delete Financial Item Extension

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

Get Financial Item Extension By Criteria

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

Get All Financial Item Line

<https://bigledger.stoplight.io/docs/blg-akaun-api-docs-public/6edddda835861e-get-all-ecomsync-item-lines-etl-ep>

Create Financial Item Line

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

Update Financial Item Line

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

Get Financial Item Line By Guid

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

Delete Financial Item Line

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

Get Financial Item Line By Criteria

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

Add Files to Financial Item

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

Get File In Financial Item

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

2.6.3.2. Ecomsync Item Api

Ecomsync item is where the product stored for marketplace such as Lazada, Shopee, CpCommerce

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

- bl_fi_mst_ecomsync_item_hdr
 - compulsory table that need to be passed
 - consist of details of marketplace product
- bl_fi_mst_ecomsync_item_ext
 - consists of extra information of the product that not exist in header or line table
- bl_fi_mst_ecomsync_item_line
 - this table is storing marketplace product details for child item

Create Ecomsync Item

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

Update Ecomsync Item

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

Get all Ecomsync Item

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

Get Ecomsync Item by Guid

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

Get Ecomsync Item by Criteria

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

Delete Ecomsync Item

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

Create Ecomsync Item Extension

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

Update Ecomsync Item Extension

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

Get All Ecomsync Item Extension

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

Get Ecomsync Item Extension by Guid

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

Get Ecomsync Item Extension by Criteria

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

Delete Ecomsync Item Extension

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

Create Ecomsync Item Line

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

Update Ecomsync Item Line

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

Get All Ecomsync Item Line

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

Get Ecomsync Item Line By Guid

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

Get Ecomsync Item Line by Criteria

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

Delete Ecomsync Item Line

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

[line-by-guid-etl-ep](#)

Add Multiple Files In Ecomsync Item

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

Get File In Ecomsync Item

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

2.6.3.3. Stock Availability API

This api to get stock availability of the product which synced from marketplace. To get stock availability, you may refer to Ecomsync Item Api([Section 2.6.3.2, “Ecomsync Item Api”](#)). The stock availability is stored in bl_fi_mst_ecomsync_item_hdr.qty_balance.

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

The stock balance is obtained from multiple branches which will be configured by users in organization applet.Based on this selection of branches, everytime the sales order created, the system will updated the stock availability in bl_fi_mst_ecomsync_item_hdr.qty_balance where the mkt_guid(branch/marketplace) part of branch that are configured.

The calculation of stock availability as followed

- Single item
 - Qty_To_Sync_To_Marketplace = Qty_of_System_Stock(multiple locations) - Qty_of_Open_Sales_order - Qty_buffer_configured
 - bl_fi_mst_ecomsync_item_hdr.qty_buffer = Qty_buffer_configured → this figure is set in the organization applet
 - qty_buffer is the total stock that will be held from included in stock availability. The purpose is ensured there are extra stock in case of emergency or reserved for specific reason.
 - Qty_of_Open_Sales_order is calculated from bl_fi_generic_doc_line_open_queue

2.6.3.4. Sales Order API

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

- bl_fi_generic_doc_hdr
 - compulsory table that need to be passed
 - consist of details of sales order including sales order number, billing and delivery

details

- bl_fi_generic_doc_line
 - consists of details of item including voucher involved in sales order transaction
- bl_fi_generic_doc_ext
 - this table stores extra information which is not stored in bl_fi_generic_doc_hdr
- bl_fi_generic_doc_event
 - this table is 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 links the generic document. It can link from any server doc type such as 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/1rzXKIOxaXKT2ADwugYIrjJvxbQGYuKMY/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](#)
- [\[h4_cpcoc_mod_module_applets\]](#)

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=cQ0anQfsS0w> (*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 live 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.

In future, we may allow hostname to be created under using 2 approach:

TIP

- 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: `_7760b3c88f1556jjjjjjjjjj.mydomain.com`
- Record Value: `_80fb2b1ef05e7xxxxxxxxxx.yyyyyyyyyy.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 Cellabs 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 able 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 other modules. Explaining that certain detail about

4.15.1.1. Overview

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

4.15.1.2. Applets

4.15.1.3. Features and Functions

4.15.1.4. What's New

4.15.1.5. Getting Started

4.15.1.6. Module Dependencies

4.15.2. Procure To Pay - Unique Value Proposition

4.15.3. Procure To Pay - Related Applets

4.15.4. Procure To Pay - Project Implementation Steps

4.15.4.1. Scope Management (End Results)

Begin with the end in mind

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

4.15.4.2. Project Gantt Chart

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

4.15.4.3. Project Kickstart Meeting

4.15.4.4. Weekly Meeting

4.15.4.5. Agile Method

4.15.4.6. Cashflow Projection

4.15.4.7. Human Resource Management

- Milestones and Rewards

4.15.4.8. Communication Management

4.15.4.9. Risk Management

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

4.15.4.10. UAT (User Acceptance Test)

4.15.4.11. Requirement Analysis

4.15.4.12. Project Goes Live

4.15.4.13. Post Mortem

4.16. HR Module

4.16.1. Introduction

4.17. Order To Cash Module

4.17.1. Introduction

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

4.17.1.1. Overview

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

4.17.1.2. Applets

4.17.1.3. Features and Functions

4.17.1.4. What's New

4.17.1.5. Getting Started

4.17.1.6. Module Dependencies

4.17.2. Order To Cash - Unique Value Proposition

4.17.3. Order To Cash - Related Applets

4.17.4. Order To Cash - Project Implementation Steps

4.17.4.1. Scope Management (End Results)

Begin with the end in mind

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

4.17.4.2. Project Gantt Chart

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

4.17.4.3. Project Kickstart Meeting

4.17.4.4. Weekly Meeting

4.17.4.5. Agile Method

4.17.4.6. Cashflow Projection

4.17.4.7. Human Resource Management

- Milestones and Rewards

4.17.4.8. Communication Management

4.17.4.9. Risk Management

- Identify third party dependency

- Identify backup plans
- Identify contingency plans

4.17.4.10. UAT (User Acceptance Test)

4.17.4.11. Requirement Analysis

4.17.4.12. Project Goes Live

4.17.4.13. Post Mortem

4.18. Warehouse Management Module

4.18.1. Introduction

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

4.18.1.1. Overview

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

4.18.1.2. Applets

4.18.1.3. Features and Functions

4.18.1.4. What's New

4.18.1.5. Getting Started

4.18.1.6. Module Dependencies

4.18.2. Warehouse Management - Unique Value Proposition

4.18.3. Warehouse Management - Related Applets

4.18.4. Warehouse Management - Project Implementation Steps

4.18.4.1. Scope Management (End Results)

Begin with the end in mind

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

4.18.4.2. Project Gantt Chart

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

4.18.4.3. Project Kickstart Meeting

4.18.4.4. Weekly Meeting

4.18.4.5. Agile Method

4.18.4.6. Cashflow Projection

4.18.4.7. Human Resource Management

- Milestones and Rewards

4.18.4.8. Communication Management

4.18.4.9. Risk Management

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

4.18.4.10. UAT (User Acceptance Test)

4.18.4.11. Requirement Analysis

4.18.4.12. Project Goes Live

4.18.4.13. Post Mortem

4.19. Customer Data Platform

4.19.1. Introduction

The intention of this section in the documentation. What this section cover, and not covering... and how it will link to 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 possible 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

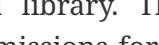
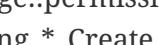
5.1.15.2. Developer Registration

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.  * 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.  * 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 controller.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.  * List down the permission definitions for the listed webservices initially.  * 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'  **Insert the permission definitions into the permission templates 

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.

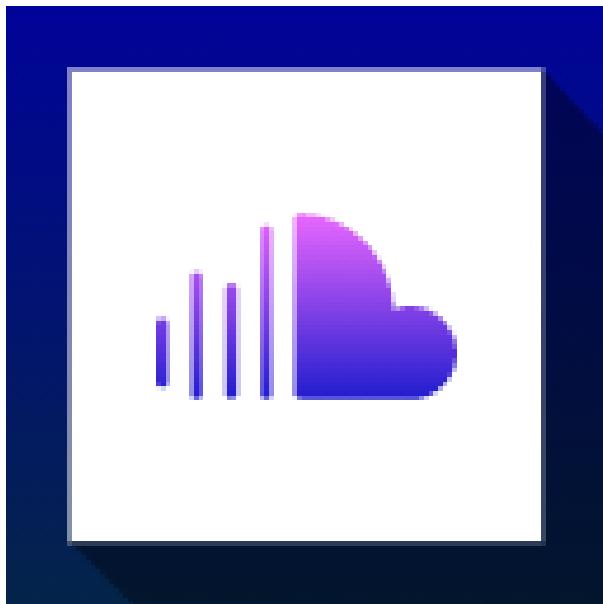
Appendix A: Applet Directory

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

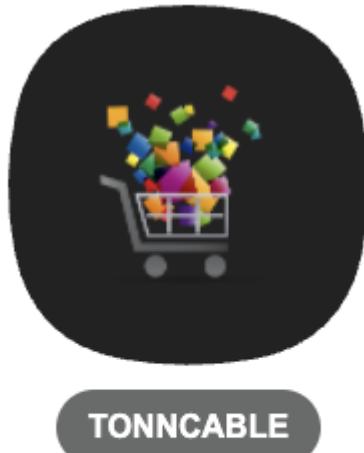
This applet is used in the following modules:

- [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



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)

Item Code	Item Name	Type
RPSF070300	STRETCH FILM 70MM 30MIC...	BASIC_ITEM
RRXLMBR00	XLPE MASTER BATCH - RED ...	BASIC_ITEM
MCTC325MEC	3 MM X 25MM COPPER TAP...	BASIC_ITEM
MATA325HJF	3MM X 25MM ALUMINIUM T...	BASIC_ITEM
MATA325HJE	3MM X 25MM ALUMINIUM T...	BASIC_ITEM
MCTC325MET	3 MM X 25 MM COPPER TAP...	BASIC_ITEM
P/P 4 MM2 X 2C	P/P 4 mm2 X 2C	BASIC_ITEM
RRPVTI1GN0	PVC T1 GREEN	BASIC_ITEM
RRPVTI1BK0	PVC T1 BLACK	BASIC_ITEM
P/S/P 2MM	P/S/P 2MM	BASIC_ITEM
P/S/P 6 MM2 X 2C	P/S/P 6 mm2 X 2C	BASIC_ITEM

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 relevant 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

The screenshot displays the akaun software interface. On the left, there is a sidebar with various icons. The main area has two windows: 'Item Listing' on the left and 'Item Edit' on the right. In the 'Item Listing' window, a table shows several items with columns for Item Code, Item Name, Type, and others. One row is highlighted with a red border. In the 'Item Edit' window, there are four tabs at the top: Main (which is active), Item Category, Tax, and Dimension. The 'Main' tab contains fields for Item Code (MCTC325MET), Item Name (3 MM X 25 MM COPPER TAPE (MET)), Type (Basic Item), Sub Item Type (Basic Quantity), Base UOM (KG), Abbreviation (Prefix), EAN Code, Currency (MYR - Malaysian ringgit), Status (ACTIVE), and Remarks. There are also checkboxes for EcomSync and Tracking Inventory?

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

The screenshot shows the akaun software interface. On the left, there is a sidebar with various icons: a shopping cart, a person, a cart, a euro symbol, a file, a clock, an upward arrow, a magnifying glass, a gear, and a headphones icon. The main area has a title bar 'akaun'. Below the title bar, there is a search bar with placeholder 'Search...' and a dropdown for 'Rows' set to 50. To the right of the search bar are navigation arrows and a page number indicator 'page 1 of 1'. The central part of the screen is divided into two main sections. On the left is a 'Item Listing' grid with columns for Item Code, Item Name, and Type. The grid contains several rows of item data. On the right is the 'Item Edit' form, which is currently on the 'Main' tab. The 'Main' tab is highlighted with a red box. The form fields include:

- Item Code:** MCTC325MET
- Item Name:** 3 MM X 25 MM COPPER TAPE (METER)
- Type:** Basic Item
- Sub Item Type:** Basic Quantity
- Base UOM:** KG
- Abbreviation (Prefix):** Abbreviation (Prefix)
- EAN Code:**
- Currency:** MYR - Malaysian ringgit
- Status:** ACTIVE
- Remarks:**

 At the bottom of the form, there are two checkboxes: EcomSync and Tracking Inventory?.

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.

The screenshot displays the akaun software interface with two main modules visible:

- Item Listing Module:** On the left, it shows a list of items with columns for Item Code, Item Name, and Type. One item, "MCTC325MET", is highlighted in blue. The interface includes search, filter, and pagination tools.
- Item Category Module:** On the right, it shows a list of categories with columns for Category Code, Category Name, and Level Value. A red box highlights the "Item Category" tab in the top navigation bar. The interface includes search, filter, and pagination tools. A message at the bottom right states "No Rows To Show".

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.

The screenshot shows two overlapping windows. On the left is the 'Item Category' module, which includes a search bar, a table with columns for Category Code, Category Name, and Level Value, and a large red box highlighting the 'Item Category' tab at the top. On the right is the 'Category Add' module, featuring a search bar, a table with columns for Category Code, Category Name, and Level Value, and a red box highlighting the 'Category Add' tab at the top.

TAX TAB

The screenshot shows the 'Item Listing' module on the left and the 'Item Edit' module on the right. In the 'Item Edit' module, the 'Tax' tab is selected, indicated by a red box. A checkbox labeled 'Tax Applicable?' is checked, also highlighted with a red box. The 'Item Edit' module contains fields for Tax Country, Input Tax Type, Input Tax Code, Input Tax Rate (%), Output Tax Type, and Output Tax Code.

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 dimensions to fill in

The screenshot shows the akaun software interface. On the left, there is a sidebar with various icons for different modules like Sales, Purchase, Inventory, etc. The main area has two tabs: 'Item Listing' and 'Item Edit'. The 'Item Edit' tab is active and has a sub-tab 'Dimension Details' which is highlighted with a red box. Below this, there are fields for Height, Length, Width, and Weight. On the far right, there is a 'Save' button.

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.

The screenshot shows two overlapping windows. On the left is the 'Item Listing' screen, which includes a search bar, a table of items with columns for Item Code, Item Name, Type, and a blue '+' button. On the right is the 'Item Edit' screen, which has tabs for 'Branch Linking' (highlighted with a red box), 'Company Linking', and 'PNS Settlement Method'. It also features a search bar and a table for branch linking.

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:

This screenshot shows the 'Branch Add' screen. It has a search bar, a table listing branches with columns for Branch Code, Branch Name, and Creation Date, and a large blue '+' button highlighted with a red box. The table lists several branches, including RAHAT TEST 123, AKIB BRANCH, 1TEST1, SHOPEE IZAN BRANCH, VIEWNET_001_BRANCH, and NTTEST1.

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.

The screenshot shows the akaun software interface. On the left, there is a vertical toolbar with various icons. The main area has two tabs: "Item Listing" and "Company Linking". The "Item Listing" tab is active, showing a grid of items with columns for Item Code, Item Name, Type, and others. A red box highlights the "Company Linking" tab. The "Company Linking" tab is also active, showing a grid of companies with columns for Company Code, Company Name, and Creation Date. A red box highlights the "Company Linking" tab.

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.

The screenshot shows the akaun software interface. On the left, there is a vertical toolbar with various icons. The main area has three tabs: "Item Edit", "Branch Linking", and "Company Linking". The "Company Linking" tab is active, showing a grid of companies with columns for Company Code, Company Name, and Creation Date. A red box highlights the "Company Add" button, which is located above the grid. The "Company Add" button is highlighted with a red box. The "Company Linking" tab is also active, showing a grid of companies with columns for Company Code, Company Name, and Creation Date. A red box highlights the "Company Linking" tab.

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

The screenshot shows two main windows side-by-side. On the left is the 'Item Listing' module, which displays a grid of items with columns for Item Code, Item Name, and Type. A red box highlights the blue '+' button in the top-left corner of this module. On the right is the 'PNS Settlement Method' module, which has tabs for 'Company Linking', 'PNS Settlement Method' (which is selected and highlighted with a red box), and 'Pricing Scheme'. Under the 'Settlement Type' tab, 'Payment Provider' is selected. Below this is another grid for 'Settlement Code', 'Settlement Name', and 'Payment Provider', which currently shows 'No Rows To Show'.

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.

This screenshot shows the 'Settlement Method Linking' module. It features a 'Settlement Type' dropdown menu with two options: 'Payment Provider' and 'Membership Point Currency', both of which are highlighted with a red box. A red box also highlights the blue '+' button in the top-left corner of this module. The rest of the interface is similar to the one in the previous screenshot, showing the 'Item Edit' and 'Pricing Scheme' tabs.

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.

The screenshot shows the akaun platform interface. On the left, there is a vertical toolbar with various icons. The main area has two tabs: "Item Listing" and "Pricing Scheme". The "Pricing Scheme" tab is currently active and highlighted with a red box. The "Pricing Scheme" table contains the following data:

Pricing Scheme Code	Pricing Scheme Name	Sales Unit Price
PRICE_001	EMP_LIST_PRICE	3
PRICE_002	EMP_SALES_WHOLESALE_D...	0.00
PRICE_003	EMP_DISCOUNT_PRICE_1	0.00
PRICE_004	EMP_DISCOUNT_PRICE_2	0.00
PRICE_005	EMP_DISCOUNT_PRICE_3	0.00
PRICE_006	SEASONAL PRICE	0.00
PRICE_009	new year price	0.00
PRICE_011	M00001	0.00
PRICE_012	RRP	0.00
PRICE_013	tesy	0.00
PRICE_014	EXTRA	0.00
PRICE_015	KRAFTON-INR-PRICE	0.00
PRICE_016	price_017	0.00
PRICE_017	WY-PS-TEST	0.00

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

The screenshot shows the akaun platform interface. On the left, there is a vertical toolbar with various icons. The main area has two tabs: "Item Edit" and "Item Price Edit". The "Item Price Edit" tab is currently active and highlighted with a red box. The "Item Price Edit" table contains the following data:

Price Name	Price Code
EMP_DISCOUNT_PRICE_2	PRICE_004

Below the table, there are several input fields for price editing:

- Sales Unit Price (Incl. Tax) *: 0.00
- Sales Unit Price (Excl. Tax) *: 0.00
- Sales Unit Price Tax Amt *: 0.00
- Sales Min Price (Incl. Tax): 0.00
- Sales Min Price (Excl. Tax): 0.00
- Sales Max Price (Incl. Tax): 0.00
- Sales Max Price (Excl. Tax): 0.00
- Sales Max Price Tax Amt: 0.00
- Sales Unit Price Before Discount (Incl. Tax)

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.

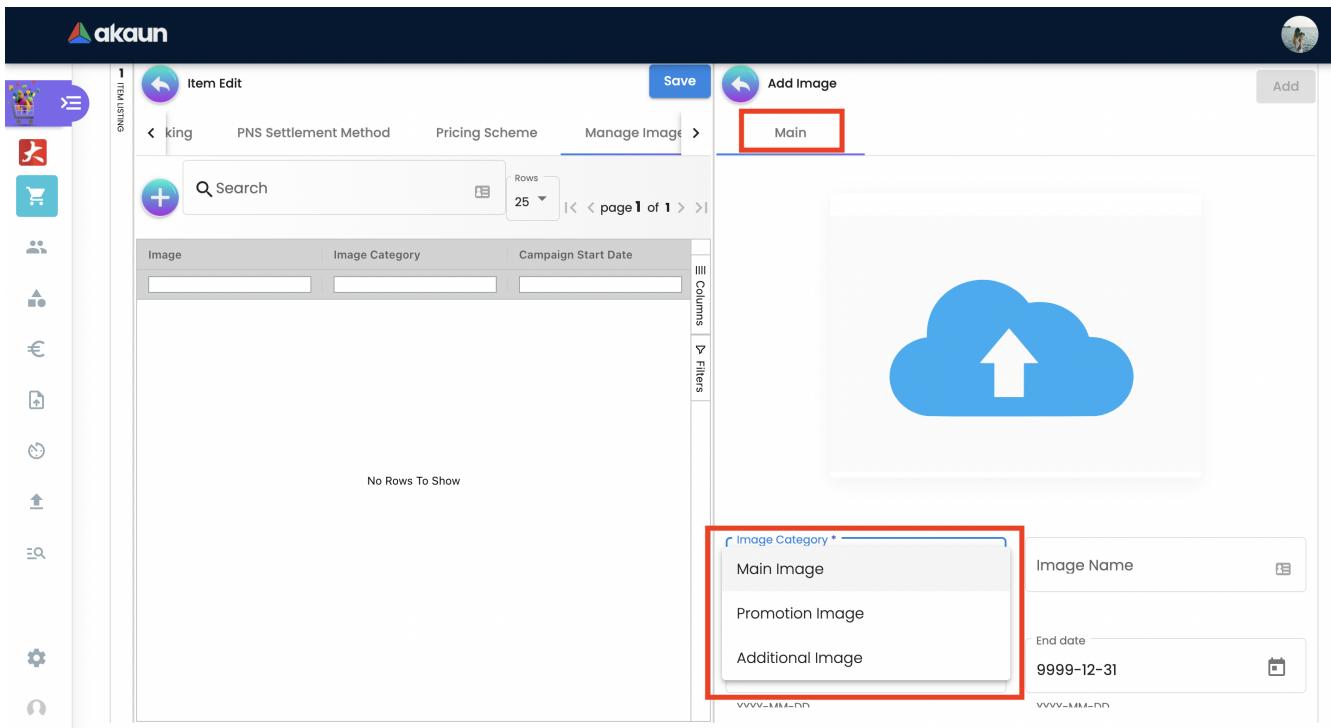
The screenshot shows the 'Item Edit' screen in the akaun software. The top navigation bar includes tabs for 'Method', 'Pricing Scheme', 'Manage Image' (which is highlighted with a red box), and 'Entity Pricing'. Below the tabs is a search bar with a '+' button (also highlighted with a red box) and a 'Rows' dropdown set to 25. To the right of the search bar is a large blue cloud icon with a white upward arrow, symbolizing file upload. Further down are sections for 'Image Category' (with a dropdown menu and a search input field), 'Start date' (set to 2022-06-21), and 'End date' (set to 9999-12-31).

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:

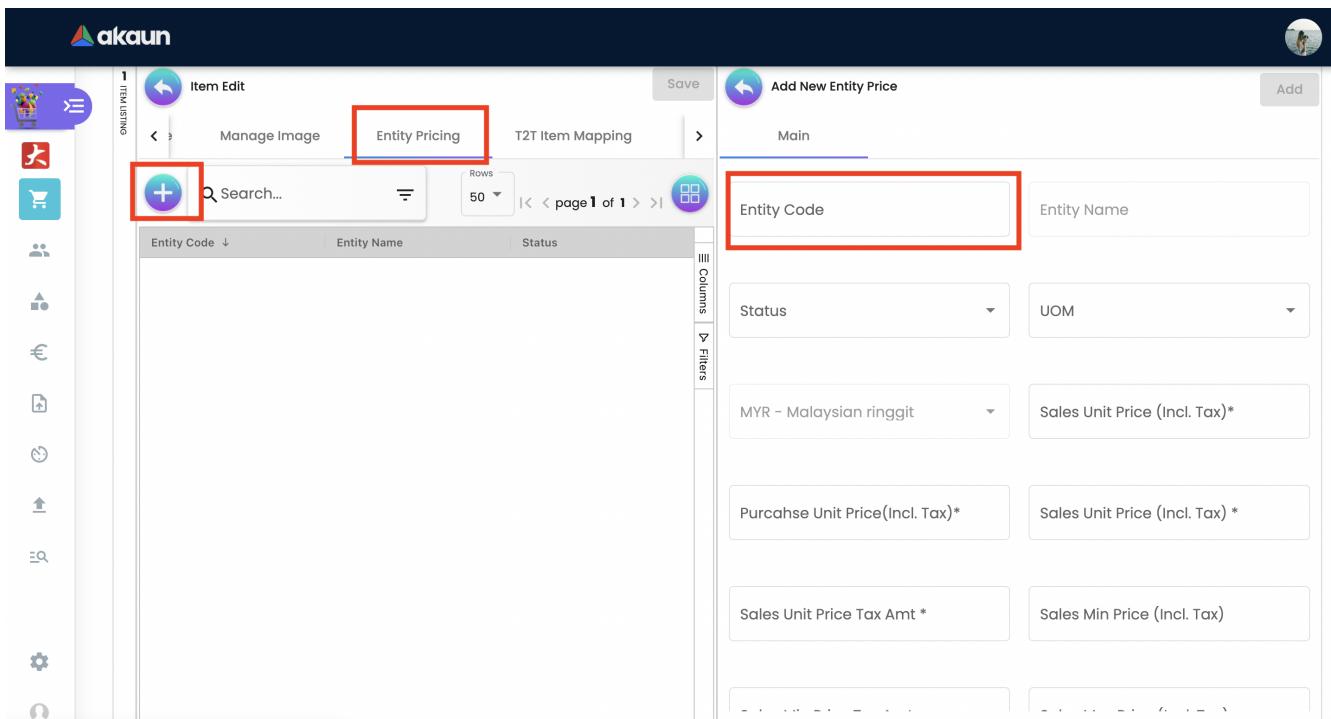
- Item = Samsung Phone
 - Main Image = the image of Samsung phone
 - Promotional Image = a themed image (based on the occasion) of Samsung phone eg. Christmas sale
 - Additional images = images of Samsung phone in a different angles, the box, or additional items inside the box



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

The screenshot shows the 'Add New Entity Price' screen. On the left, there's a sidebar with various icons. The main area has fields for 'Entity Code' (highlighted by a red box), 'Entity Name', 'Status', 'UOM', currency selection ('MYR - Malaysian ringgit'), and price inputs ('Sales Unit Price (Incl. Tax)*', 'Purchase Unit Price (Incl. Tax)*', 'Sales Unit Price Tax Amt *', 'Sales Min Price (Incl. Tax)'). To the right, a modal window titled 'Select Entity' displays a list of entities categorized as CUSTOMER, SUPPLIER, and EMPLOYEE. The 'EMPLOYEE' category is highlighted with a red box.

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.

The screenshot shows the 'Add New Entity Price' screen with the 'Entity Code' field populated with '1000005' and the 'Entity Name' field populated with 'DAYA SEMPURNA MANUFACTURING'. The modal window 'Select Entity' is still open, and its content is highlighted with a red box. The 'Add' button in the top right corner of the modal is also highlighted with a red box.

T2T ITEM MAPPING TAB

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

The screenshot shows the akaun platform interface. On the left, there is a vertical sidebar with various icons. The main area has two tabs open:

- Item Listing**: A table showing a list of items with columns for Item Code, Item Name, Type, and more. One row, "LZD_SHIPPING_FEE_3", is highlighted in blue.
- T2T Item Mapping**: This tab is highlighted with a red box. It contains fields for Host Tenant (set to "staging_tenant") and Guest Tenant Item Mapping (set to "LAZADA SHIPPING FEE"). Below this is a table with columns for Host Tenant Item Code, Host Tenant Item Name, Host Tenant Code, and Host Tenant Description. It displays the message "No Rows To Show".

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.

The screenshot shows the 'Item Edit' screen in the akaun application. On the left, there's a vertical sidebar with various icons. The main area has tabs: 'Scheme', 'Manage Image', 'Entity Pricing', 'T2T Item Mapping' (which is selected), and 'Guest Tenant Item Mapping' and 'Guest Tenant Perm'. A 'Save' button is at the top right. Below the tabs, there are fields for 'Item Code' (LZD_SHIPPING_FEE_3) and 'Item Name' (LAZADA SHIPPING FEE). A 'Tenant' dropdown also shows 'staging_tenant'. To the right is a 'Tenant Mapping' section with a table header 'Host Tenant Item Code', 'Host Tenant Item Name', and 'Host Tenant Code'. A large red box surrounds the 'staging_tenant' dropdown. Below it, another red box surrounds the purple '+' button in the first row of the table.

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

The screenshot shows the 'Marketplace' tab in the akaun application. It features three tabs: 'Main' (selected), 'Other Reseller Websites', and 'Checking'. The 'Main' tab contains a table for 'Item Listing' with columns 'Item Code', 'Item Name', and 'Type'. The table lists items like SB-TEST3, CHAMPAGNE GLASS, etc. To the right is an 'Item Edit' section with tabs: 'Lang', 'T2T Item Mapping', 'Marketplace' (highlighted with a red box), and 'Stock Availability'. The 'Marketplace' tab has its own table for 'Main' with columns 'Store Name', 'Store Code', and 'Type'. A large red box surrounds the 'Marketplace' tab. Below the tables, both sections say 'No Rows To Show'.

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

The screenshot shows two overlapping screens from the akaun platform. On the left, the 'Item Edit' screen has tabs for 'Main', 'Entity Pricing', 'T2T Item Mapping', and 'Marketplace'. The 'Main' tab is selected, and the 'Other Reseller Websites' tab is highlighted with a red box. A search bar and a 'Save' button are at the top. On the right, the 'Store Add' screen shows a table of stores with columns for 'Branch Code', 'Branch Name', 'Marketplace', and 'Rows'. A large red box highlights the 'Main' tab in the 'Item Edit' header and the 'Add' button in the 'Store Add' header.

- 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.

The screenshot shows two overlapping screens from the akaun platform. On the left, the 'Item Listing' screen displays a table of items with columns for 'Item Code', 'Item Name', and 'Type'. A red box highlights the 'Item Listing' tab in the header. On the right, the 'Item Edit' screen has tabs for 'Pricing', 'T2T Item Mapping', 'Marketplace', and 'Stock Availability'. The 'Marketplace' tab is selected, and the 'Other Reseller Websites' tab is highlighted with a red box. Below the tabs, there are three input fields labeled 'Marketplace URL 1', 'Marketplace URL 2', and 'Marketplace URL 3', each enclosed in a red box.

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

==== STOCK AVAILABILITY TAB

The screenshot shows two main tabs: "Item Listing" and "Item Edit".

Item Listing: This tab displays a table of items with columns: Item Code, Item Name, and Type. The table contains 11 rows of data.

Item Code	Item Name	Type
SB-TEST3	SB-TEST3 DESC	BASIC_ITEM
CHAMPAGNE GLASS	CHAMPAGNE GLASS	BASIC_ITEM
HAND_SANITISER	HAND SANITISER	BASIC_ITEM
TESTV	TESTV	BASIC_ITEM
COKLAT	COKLAT	BASIC_ITEM
USD-\$10	USD-\$10	BASIC_ITEM
ITEM ABC	ITEM ABC	BASIC_ITEM
BIN777	BIN777	BASIC_ITEM
LZD_SHIPPING_FEE_3	LAZADA SHIPPING FEE	BASIC_ITEM
BOYS MUSLIM WEAR	BOYS MUSLIM WEAR	BASIC_ITEM
TESTING_YEASIN_V3	Test Yeasin 3	GROUPED ITEM
WARRANTY	warranty	WARRANTY
IPAY88	IPAY88	SERVICE
LZD_SHIPPING_FEE	LZD_SHIPPING_FEE	BASIC_ITEM
ZAIN TESTING1	ZAIN TESTING1	MADE_TO_ORDER
DIYHT	DIY home treatment	PACKAGE
TESTING ??????	TESTING ??????	BASIC_ITEM

Item Edit: This tab has a sub-tab "Stock Availability" highlighted with a red box. It displays a table with columns: Store Name, Balance, and Sales Order. A message "No Rows To Show" is displayed.

Store Name	Balance	Sales Order
------------	---------	-------------

ATTRIBUTE SET TAB

The screenshot shows the "Attribute Set" tab.

Attribute Set Link: This section includes a search bar and a table with columns: Attribute Set Name, Type, Modified By, and Modified Date. A red box highlights the "Attribute Set" tab in the navigation bar above the table.

Attribute Set Name	Type	Modified By	Modified Date
test2		Rawan Alsamman	2021-07-02 15:10:22
testing set		All Hassan	2021-05-23 10:11:13
Rahat test		Rahat Shahriar	
test		Aparna Asokan	

Add Attribute Set: This section shows a table with columns: Attribute Set Name, Modified By, and Modified Date. A red box highlights the "Add" button in the top right corner.

Attribute Set Name	Modified By	Modified Date
test2	Rawan Alsamman	2021-07-02 15:10:22
testing set	All Hassan	2021-05-23 10:11:13
Rahat test	Rahat Shahriar	
test	Aparna Asokan	

PAGES TAB

The screenshot displays two main windows of the akaun application. On the left, the 'Item Listing' screen shows a grid of items with columns for Item Code, Item Name, Type, and more. A search bar and pagination controls are at the top. On the right, the 'Item Edit' screen shows tabs for Availability, Attribute Set, Pages (which is highlighted with a red box), and Reviews. A large search bar and a table for managing pages are also present. Both screens have filter and column options.

REVIEWS TAB

This screenshot shows the 'Item Edit' screen with the 'Reviews' tab selected (highlighted with a red box). The left panel contains a review configuration form with fields for Title, Rating Default Value, Rating Configuration, Status, and Summary. The right panel shows a table for managing reviews with columns for Title, Default Rating, and Total Votes. A search bar and pagination controls are at the top of the table area. The message 'No Rows To Show' is displayed below the table.

A.8.4. Menu 02 - Category Groups

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

Category Group Code	Category Group Name	Type	Param Code	Param Name	Creation Date	Rows
CATEGORY_GROUP_CODE_1	CATEGORY_GROUP_NAME	CP_COM	CATEGORY_GROUP_NAME	CATEGORY_GROUP_NAME	2022-02-24	2
BrandCode	Brand S	CP_COM	Brand	BrancdCode	2022-01-19	2
GroupTest	Group Test	CP_COM	GroupTest	GroupTest	2021-12-30	2
FX	FOREIGN CURRENCY	DOC_ITEM	FX	FX	2021-10-04	2
tesst	tesst	DOC_ITEM	tesst	432tesst	2021-09-22	2
TEST	TEST	CP_COM	TEST	TEST	2021-09-08	2
CP Commerce	CP Commerce	CP_COM	CP Commerce	CP Commerce	2021-09-01	2
ITEM_CATEGORY	Item category	DOC_ITEM	ITEM_CATEGORIES	Item Categories	Invalid date	2
CP_COMMERCE	CP_COMMERCE	DOC_ITEM	CP_COM	CP_COM	2021-08-25	2
testing label list4	list name4	DOC_ITEM	list param code4	list param name4	2021-08-23	2

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

The screenshot shows two side-by-side interfaces of the akaun application. On the left is the 'Category Group Listing' screen, which includes a search bar with a plus sign icon (highlighted with a red box), a table of category groups, and various filters and pagination controls. On the right is the 'Category Group Create' screen, which has tabs for 'Main' and 'Categories'. It contains fields for 'Category Group Code' (CP_COMMERCE), 'Category Group Name' (CP Commerce), 'Type' (CP_COMMERCE), 'Param Code' (CP Commerce), 'Param Name' (CP Commerce), and 'Status' (ACTIVE). A 'CREATE' button is located at the top right.

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.

The screenshot shows the 'Category Group Listing' screen on the left and the 'Category Group Edit' screen on the right. The 'Edit' screen has tabs for 'Main' and 'Categories'. The 'Main' tab is selected, displaying fields for 'Category Group Code' (CP_COMMERCE), 'Category Group Name' (CP Commerce), 'Type' (CP_COMMERCE), 'Param Code' (CP Commerce), 'Param Name' (CP Commerce), and 'Status' (ACTIVE). Below these are sections for 'Created By' (haknaz@wavelet.net) and 'Modified By' (haknaz@wavelet.net), each with a date and time (2021-09-01 10:48:30). A 'UPDATE' button is located at the top right of the 'Edit' screen, and a 'Remove' button is at the bottom right.

Categories

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

Category Group Code	Category Group Name	Type
CATEGORY_GROUP_CODE_1	CATEGORY_GROUP_NAME	CP_COM
BrandCode	Brand S	CP_COM
GroupTest	Group Test	CP_COM
FX	FOREIGN CURRENCY	DOC_ITEM
tesst	tesst	DOC_ITEM
TEST	TEST	CP_COM
CP Commerce	CP Commerce	CP_COM
ITEM_CATEGORY	Item category	DOC_ITEM
CP_COMMERCE	CP_COMMERCE	DOC_ITEM
testing label list4	list name4	DOC_ITEM

Category Code	Category Name	Level Value
TEST-FILTER	test filter	1
T345	T3	1
T2	T2	1
T1	T1	1
T	T	2

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

Category Code	Category Name	Level Value
Coffee bean	coffee bean	2
1234	New arrivals	1
CP_APPLET	CP_applet	1

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

The screenshot shows the akaun software interface with two tabs open: "Category Group Edit" and "Item Category Edit". The "Item Category Edit" tab is active, with its title highlighted by a red box. The "Main" tab is also highlighted with a red box. The interface includes a search bar, a grid view of categories, and detailed edit fields for the selected category ("coffee bean").

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

The screenshot shows the akaun software interface with the "Item Category Edit" tab active. The "Manage Image" sub-tab is selected, indicated by a red box. The "Main" tab is also highlighted with a red box. The interface includes a search bar, a grid view of images, and an "Add Image" button. A large blue cloud icon with an upward arrow is displayed, suggesting the process of uploading images.

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

Category Code	Category Name	Category Group	Level Value	Creation Date	Modified Date	Status
TEST-FILTER	test filter	CATEGORY_GROUP_NAME	1	2022-05-30 11:11:08	2022-06-22 22:21:20	ACTIVE
T345	T3	CATEGORY_GROUP_NAME	1	2022-06-15 11:34:50	2022-06-15 12:30:51	ACTIVE
T2	T2	CATEGORY_GROUP_NAME	1	2022-06-15 11:19:40	2022-06-15 11:19:40	ACTIVE
T1	T1	CATEGORY_GROUP_NAME	1	2022-06-15 11:12:46	2022-06-15 11:12:46	ACTIVE
T	T	CATEGORY_GROUP_NAME	2	2022-06-15 11:08:41	2022-06-15 11:08:41	ACTIVE
Coffee bean	coffee bean	CP Commerce	2	2021-09-08 12:43:53	2022-03-11 14:15:04	ACTIVE
DOUBLE CPCOMMERCE23	double cpcommerce	CP_COMMERCE	1	2021-09-01 10:21:37	2022-02-25 15:41:28	ACTIVE
label list4	list of labels 4	CP_COMMERCE	1	2021-08-13 11:33:39	2022-02-25 11:01:30	ACTIVE
TEST2	Test2	Group Test	1	2022-01-28 14:50:39	2022-02-14 17:17:32	ACTIVE
3	Electronics	CP_COMMERCE	2	2021-10-07 17:22:31	2021-12-13 12:51:01	ACTIVE
202108-CAT1	202108-Cat1	Item category	1	2021-08-19 15:20:50	2021-12-13 11:56:11	ACTIVE
PERSONAL_BEAUTY CARE	PERSONAL & BEAUTY CARE	Item category	1	2021-07-03 10:45:05	2021-09-23 01:42:27	ACTIVE
TEST	TEST	TEST	1	2021-09-08 08:56:15	2021-09-23 01:08:42	ACTIVE
TEST99	TEST99	CP_COMMERCE	1	2021-09-06 18:11:28	2021-09-23 00:09:19	ACTIVE
under10	under101	Item category	2	2021-06-18 22:36:19	2021-09-22 18:34:45	ACTIVE
DINING	DINING	CP_COMMERCE	3	2021-07-19 20:35:48	2021-09-06 14:59:03	ACTIVE
1234	New arrivals	CP Commerce	1	2021-01-25 22:29:22	2021-09-06 14:58:48	ACTIVE

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:

Category Name	Level Value	Creation Date	Modified Date	Status
TEST-FILTER	1	2022-05-30 11:11:08	2022-06-22 22:21:20	ACTIVE
T345	1	2022-06-15 11:34:50	2022-06-15 12:30:51	ACTIVE
T2	1	2022-06-15 11:19:40	2022-06-15 11:19:40	ACTIVE
T1	1	2022-06-15 11:12:46	2022-06-15 11:12:46	ACTIVE
Coffee bean	2	2022-06-15 11:08:41	2022-06-15 11:08:41	ACTIVE
DOUBLE CPCOMMERCE23	2	2021-09-08 12:43:53	2022-03-11 14:15:04	ACTIVE
label list4	1	2021-08-13 11:33:39	2022-02-25 11:01:30	ACTIVE
TEST2	1	2022-01-28 14:50:39	2022-02-14 17:17:32	ACTIVE
3	2	2021-10-07 17:22:31	2021-12-13 12:51:01	ACTIVE
202108-CAT1	1	2021-08-19 15:20:50	2021-12-13 11:56:11	ACTIVE
PERSONAL_BEAUTY CARE	1	2021-07-03 10:45:05	2021-09-23 01:42:27	ACTIVE
TEST	1	2021-09-08 08:56:15	2021-09-23 01:08:42	ACTIVE
TEST99	1	2021-09-06 18:11:28	2021-09-23 00:09:19	ACTIVE
under10	2	2021-06-18 22:36:19	2021-09-22 18:34:45	ACTIVE
DINING	3	2021-07-19 20:35:48	2021-09-06 14:59:03	ACTIVE
1234	1	2021-01-25 22:29:22	2021-09-06 14:58:48	ACTIVE

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

Category Code	Category Name	Category Group	Level Value	Creation Date	Modified Date	Status
TEST-FILTER	test filter	CATEGORY_GROUP_NAME	1	2022-05-30 11:11:08		
T345	T3	CATEGORY_GROUP_NAME	1	2022-06-15 11:34:50		
T2	T2	CATEGORY_GROUP_NAME	1	2022-06-15 11:19:40		
T1	T1	CATEGORY_GROUP_NAME	1	2022-06-15 11:12:46		
T	T	CATEGORY_GROUP_NAME	2	2022-06-15 11:08:41		
Coffee bean	coffee bean	CP Commerce	2	2021-09-08 12:43:53	2022-03-11 14:15:01	ACTIVE
DOUBLE CPCOMMERCE23	double cpcommerce	CP_COMMERCE	1	2021-09-01 10:21:37	2022-02-25 15:41:28	ACTIVE
label list4	list of labels 4	CP_COMMERCE	1	2021-08-13 11:33:39	2022-02-25 11:01:30	ACTIVE
TEST2	Test2	Group Test	1	2022-01-28 14:50:39	2022-02-14 17:17:32	ACTIVE
3	Electronics	CP_COMMERCE	2	2021-10-07 17:22:31	2021-12-13 12:51:01	ACTIVE
202108-CAT1	202108-Cat1	Item category	1	2021-08-19 15:20:50	2021-12-13 11:56:11	ACTIVE
PERSONAL_BEAUTY CARE	PERSONAL & BEAUTY CARE	Item category	1	2021-07-03 10:45:05	2021-09-23 01:42:27	ACTIVE
TEST	TEST	TEST	1	2021-09-08 08:56:15	2021-09-23 01:08:42	ACTIVE
TEST99	TEST99	CP_COMMERCE	1	2021-09-06 18:11:28	2021-09-23 00:09:19	ACTIVE
under10	under101	Item category	2	2021-06-18 22:36:19	2021-09-22 18:34:45	ACTIVE
DINING	DINING	CP_COMMERCE	3	2021-07-19 20:35:48	2021-09-06 14:59:03	ACTIVE
123A	New arrvile	CP Commerce	1	2021-01-25 22:22:22	2021-09-06 14:58:48	ACTIVE

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.

Category Code	Category Name	Category Group	Level Value
TEST-FILTER	test filter	CATEGORY_GROUP_NAME	1
T345	T3	CATEGORY_GROUP_NAME	1
T2	T2	CATEGORY_GROUP_NAME	1
T1	T1	CATEGORY_GROUP_NAME	1
T	T	CATEGORY_GROUP_NAME	2
Coffee bean	coffee bean	CP Commerce	2
DOUBLE CPCOMMERCE23	double cpcommerce	CP_COMMERCE	1
label list4	list of labels 4	CP_COMMERCE	1
TEST2	Test2	Group Test	1
3	Electronics	CP_COMMERCE	2
202108-CAT1	202108-Cat1	Item category	1
PERSONAL_BEAUTY CARE	PERSONAL & BEAUTY CARE	Item category	1
TEST	TEST	TEST	1
TEST99	TEST99	CP_COMMERCE	1
under10	under101	Item category	2
DINING	DINING	CP_COMMERCE	3
123A	New arrvile	CP Commerce	1

Category Create

Main

Category Group:

Category Code:

Category Name:

Description:

Search Filter:

Please choose a parent...

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.

The screenshot shows the akaun application interface. On the left, there is a sidebar with various icons for navigation. The main area has two tabs: 'Category Edit' (which is active) and 'Main'. The 'Main' tab is highlighted with a red box. The 'Category Edit' tab shows a form with fields for Category Group (set to 'CATEGORY_GROUP_CODE_1'), Category Code ('TEST-FILTER'), Category Name ('test filter'), Description (''), Status ('ACTIVE'), Parent (''), Created By ('alihassan@wavelet.net'), Created Date ('2022-05-30 11:11:08'), Modified By (''), and Modified Date (''). To the left of the edit form is a table titled 'Item Category Listing' showing a list of categories with columns for Category Code, Category Name, Category Group, and Level. One row is selected, showing 'TEST-FILTER' as the category code and 'test filter' as the name.

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

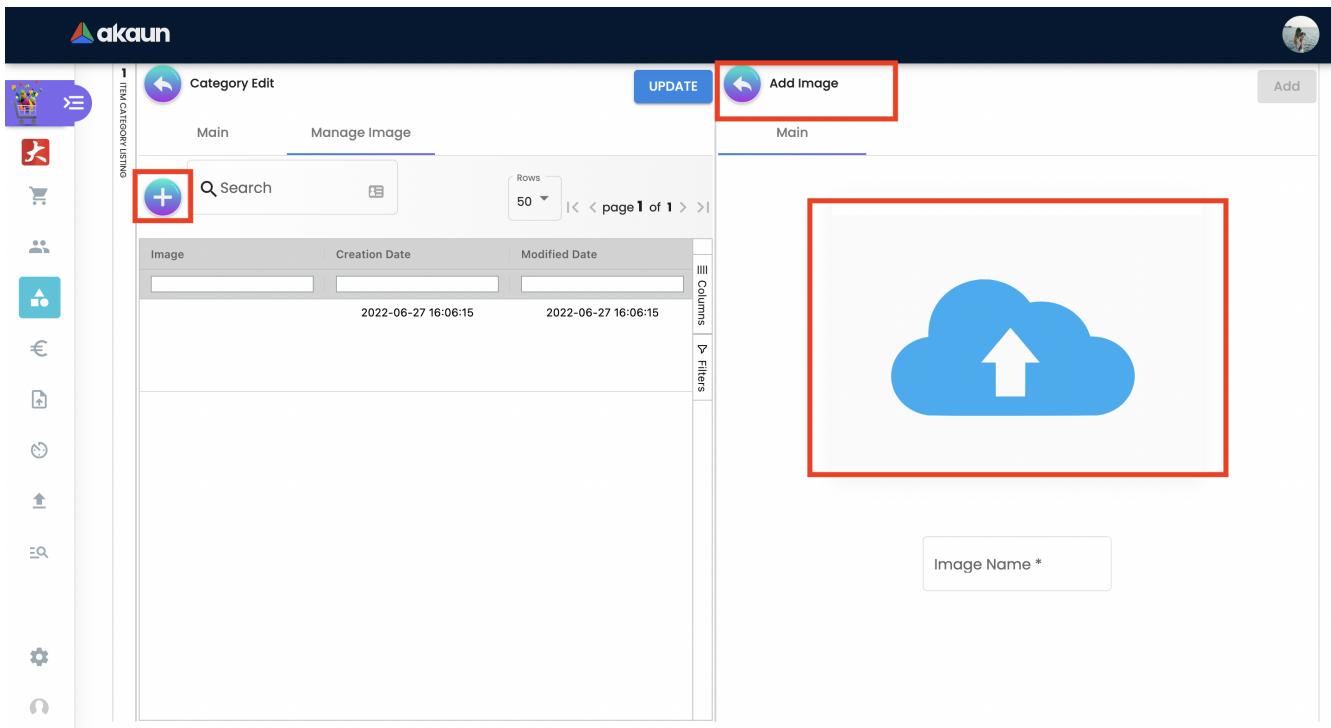
CP Commerce displays product categories for easy referral for customers. Users can use the Manage Image Tab in the Doc Item Maintenance applet to upload relevant category images. Upon clicking on categories, the user will be shown all relevant products under said categories.

The screenshot shows two tabs side-by-side:

- Item Category Listing:** This tab displays a grid of category data with columns: Category Code, Category Name, Category Group, and a 'Le' column. A search bar and a '+' button are at the top. A red box highlights the '+' button.
- Category Edit:** This tab shows a single category entry. It has tabs for 'Main' and 'Manage Image'. The 'Manage Image' tab is active, showing a preview of a blue t-shirt image, its creation date (2022-06-27 16:06:15), and its modified date (2022-06-27 16:06:15). A red box highlights the 'Manage Image' tab.

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

Pricing Scheme Code	Pricing Scheme Name	Creation Date	Modified Date	Status
PRICE_018	TEST-AYE	2022-03-03 11:42:53	2022-03-03 11:43:01	ACTIVE
PRICE_017	WY-PS-TEST	2021-10-27 14:52:50	2021-10-27 14:52:50	ACTIVE
PRICE_005	EMP_DISCOUNT_PRICE_3	2021-03-16 16:04:41	2021-09-29 17:11:54	ACTIVE
PRICE_004	EMP_DISCOUNT_PRICE_2	2021-03-10 15:43:50	2021-09-29 17:11:44	ACTIVE
PRICE_003	EMP_DISCOUNT_PRICE_1	2021-02-01 15:16:01	2021-09-29 17:11:34	ACTIVE
PRICE_002	EMP_SALES_WHOLESALE_DEALER_PRICE	2021-02-01 15:15:42	2021-09-29 17:11:22	ACTIVE
PRICE_001	EMP_LIST_PRICE	2021-01-26 16:58:45	2021-09-29 17:11:04	ACTIVE
PRICE_009	new year price	2021-05-12 02:01:26	2021-09-20 13:44:52	ACTIVE
PRICE_016	price_017	2021-07-28 11:20:10	2021-07-28 11:20:10	ACTIVE
PRICE_015	KRAFTON-INR-PRICE	2021-07-20 14:34:40	2021-07-20 14:34:40	ACTIVE
PRICE_014	EXTRA	2021-07-19 20:33:22	2021-07-19 20:33:22	ACTIVE
PRICE_013	tesy	2021-07-15 11:16:03	2021-07-15 11:16:03	ACTIVE
PRICE_012	RRP	2021-07-13 10:31:32	2021-07-13 10:31:32	ACTIVE
PRICE_011	M00001	2021-05-28 10:07:59	2021-06-24 15:07:58	ACTIVE
PRICE_006	SEASONAL PRICE	2021-03-18 15:54:02	2021-03-18 15:54:02	ACTIVE

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

The screenshot shows the 'Applet Settings' page in the akaun application. On the left, there's a sidebar with various icons and a red box highlighting the 'POS Settings' icon. The main content area is titled 'Default Branch' and contains sections for 'Default Pricing Scheme' and 'Retail Price'. It includes input fields for 'Key in PricingScheme Code/Name' and dropdown menus for 'Min Price' and 'Max Price'. A 'Save' button is located at the bottom right. The entire sidebar and main content area are enclosed in a light gray box.

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:

The screenshot shows the 'Pricing Scheme Listing' table. The sidebar on the left has a red box around the gear icon. The table has columns for 'Pricing Scheme Code', 'Pricing Scheme Name', 'Creation Date', 'Modified Date', and 'Status'. A row with the values 'PRICE_013', 'tesy', '2021-07-15 11:16:03', '2021-07-15 11:16:03', and 'ACTIVE' is highlighted with a red box. The table includes standard AG-Grid features like a search bar, filter icons, and navigation buttons for rows and pages. The entire sidebar and table area are enclosed in a light gray box.

ID	Name	Creation Date	Status
53		2022-03-03 11:43:01	ACTIVE
50		2021-10-27 14:52:50	ACTIVE
41		2021-09-29 17:11:54	ACTIVE
50		2021-09-29 17:11:44	ACTIVE
01		2021-09-29 17:11:34	ACTIVE
		2021-09-29 17:11:22	ACTIVE
PRICE_002	EMP_SALES_WHOLESALE_DEALER_PRICE	2021-02-01 15:15:42	
PRICE_001	EMP_LIST_PRICE	2021-01-26 16:58:45	
PRICE_009	new year price	2021-05-12 02:01:26	
PRICE_016	price_017	2021-07-28 11:20:10	
PRICE_015	KRAFTON-INR-PRICE	2021-07-20 14:34:40	
PRICE_014	EXTRA	2021-07-19 20:33:22	
PRICE_013	tesy	2021-07-15 11:16:03	
PRICE_012	RRP	2021-07-13 10:31:32	
PRICE_011	M00001	2021-05-28 10:07:59	
PRICE_006	SEASONAL PRICE	2021-03-18 15:54:02	

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 dropdown list and makes some amendments to the pricing.

The screenshot shows the akaun software interface. On the left, there is a sidebar with various icons. The main area has two tabs: "Pricing Scheme Listing" and "Pricing Scheme Edit".

Pricing Scheme Listing: This tab displays a table of pricing schemes with columns for "Pricing Scheme Code", "Pricing Scheme Name", and "Creation Date". A row for "PRICE_004" is selected. The table includes a search bar, a rows dropdown set to 50, and a navigation bar with page 1 of 1.

Pricing Scheme Code	Pricing Scheme Name	Creation Date
PRICE_018	TEST-AYE	2022-03-03 11:42:53
PRICE_017	WY-PS-TEST	2021-10-27 14:52:50
PRICE_005	EMP_DISCOUNT_PRICE_3	2021-03-16 16:04:41
PRICE_004	EMP_DISCOUNT_PRICE_2	2021-03-10 15:43:50
PRICE_003	EMP_DISCOUNT_PRICE_1	2021-02-01 15:16:01
PRICE_002	EMP_SALES_WHOLESALE_DEALER_PRICE	2021-02-01 15:15:42
PRICE_001	EMP_LIST_PRICE	2021-01-26 16:58:45
PRICE_009	new year price	2021-05-12 02:01:26
PRICE_016	price_017	2021-07-28 11:20:10
PRICE_015	KRAFTON-INR-PRICE	2021-07-20 14:34:40
PRICE_014	EXTRA	2021-07-19 20:33:22
PRICE_013	tasy	2021-07-15 11:16:03
PRICE_012	RRP	2021-07-13 10:31:32
PRICE_011	M00001	2021-05-28 10:07:59
PRICE_006	SEASONAL PRICE	2021-03-18 15:54:02

Pricing Scheme Edit: This tab shows the details for the selected "PRICE_004" scheme. It has tabs for "Main", "Copy", and "Checking", with "Main" selected. The form includes fields for "Pricing Scheme Code" (PRICE_004), "Pricing Scheme Name" (EMP_DISCOUNT_PRICE_2), "Description" (this is a promotion), and "Status" (ACTIVE). A "Remove" button is located at the bottom left of the edit form.

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.

The screenshot shows the 'File Import Listing' page. On the left sidebar, the 'Import Item' button is highlighted with a red box. The main area displays a table with columns: File Type, File Name, File Size, Format, Status, and Process Status. The table contains numerous rows, mostly with 'DOC_ITEM' file type and 'CSV' format, showing various statuses like ACTIVE and FAILED. There are also rows for 'DOC_ITEM_RELATIONSHIP' files. The top right of the page includes a search bar, a 'Rows' dropdown set to 50, and navigation buttons for pages 1 through 10. A 'Columns' and 'Filters' button is located in the top right corner of the table.

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.

The screenshot shows the 'File Import' page. On the left sidebar, the 'Import Item' button is highlighted with a red box. The main area has two sections: 'File Import Listing' on the left and 'File Import' on the right. In the 'File Import' section, a dropdown menu shows 'File Type' set to 'Doc Item', which is highlighted with a red box. Below it is a dashed box containing the text 'Drag and drop your file anywhere or' and a blue 'Upload File' button. To the right of the button is a 'Sample Format' section with a red box around the text 'Doc Item' and 'Doc Item Relationship'. At the bottom of the page, a red box highlights the file 'MasterData_Doc....csv' in the file list.

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 uploaded file at the bottom of the page.

File Type	File Name	File Size	Actions
DOC_ITEM	file	663	
DOC_ITEM_RELATIONSHIP	file	1047	
DOC_ITEM_RELATIONSHIP	file	1047	
DOC_ITEM_RELATIONSHIP	file	1047	
DOC_ITEM_RELATIONSHIP	file	1077	
DOC_ITEM_RELATIONSHIP	file	746	
DOC_ITEM_RELATIONSHIP	file	1077	
DOC_ITEM_RELATIONSHIP	file	746	
DOC_ITEM_RELATIONSHIP	file	1077	
DOC_ITEM	file	1077	

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 processor will run.

Scheduler Code	Scheduler Name	Status	Modified Date	Created Date
SHOPEE_ORDERS	SHOPEE_TEST_1	ACTIVE	2022-03-30 15:48:21	2022-03-24 16:55:42
LAZADA_SALES_ORDER_IDS	DAUS TESTING	ACTIVE	2022-03-30 15:48:14	2021-12-27 13:17:27
LAZADA_SALES_ORDER_IDS	DAUS TRY TEST TEST	ACTIVE	2022-03-25 15:43:34	2021-12-27 11:25:22
LAZADA_SALES_ORDER_IDS	TEST	ACTIVE	2022-03-25 15:43:28	2022-03-15 15:21:31
SHOPEE_PRODUCTS	SHOPEE_PRODUCTS	INACTIVE	2021-12-01 15:10:49	2021-12-01 15:10:49
SHOPEE_ORDERS	SHOPEE_ORDERS	ACTIVE	2021-11-30 10:10:49	2021-11-30 10:10:49
LAZADA_FULFILLMENT	LAZADA_FULFILLMENT	ACTIVE	2021-08-24 20:22:30	2021-08-24 20:22:30

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

The screenshot shows the akaun platform interface. On the left, there is a sidebar with various navigation items: Doc Item Maintenance Applet, STAGING_TENANT, Items, Category Groups, Categories, Pricing Schemes, Import Item, Scheduler (which is highlighted in blue), File Import, Search Filter, Settings, and Personalization.

The main area is divided into two sections:

- Scheduler Listing:** A table showing a list of existing schedulers. The columns include Scheduler..., Scheduler N..., Status, Modified Date, and Created Date. A red box highlights the "Add" button (+) at the top left of the table.
- Scheduler Create:** A form for creating a new scheduler. It has tabs for Details and Cron Expression. The Details tab contains fields for Scheduler Code* and Scheduler Name*. The Cron Expression tab is currently selected, showing fields for Time Interval* and Interval*. A red box highlights the "Cron Expression" tab.

Cron Expression tab

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

This screenshot is similar to the previous one, but the Cron Expression tab is explicitly selected in the Scheduler Create section. The interface includes the same sidebar and table listing existing schedulers. The Scheduler Create section now shows the cron expression configuration, with the "Cron Expression" tab highlighted by a red box. Below it, there are four tabs: Minutes, Hours, Day, and Month. The "Minutes" tab is selected, showing a radio button for "Every minute" (selected) and another for "Every [1-59] minute(s)". Below these are checkboxes for specific minutes from 0 to 17.

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.

The image shows two side-by-side screenshots of the akaun application interface.

Scheduler Listing: This screen displays a table of scheduler entries. A red box highlights the "Search..." input field at the top right of the table header. Below the table are "Columns" and "Filters" dropdowns.

Scheduler C...	Scheduler N...	Status	Modified Date	Created Date
SHOPEE_ORDE...	SHOPEE_TEST_1	ACTIVE	2022-03-30 15:...	2022-03-24 16:...
LAZADA_SALE...	DAUS TESTING	ACTIVE	2022-03-30 15:...	2021-12-27 13:...
LAZADA_SALE...	DAUS TRY TES...	ACTIVE	2022-03-25 15:...	2021-12-27 11:...
LAZADA_SALE...	TEST	ACTIVE	2022-03-25 15:...	2022-03-15 15:...
SHOPEE_PROD...	SHOPEE_PROD...	INACTIVE	2021-12-01 15:1...	2021-12-01 15:...
SHOPEE_ORDE...	SHOPEE_ORDE...	ACTIVE	2021-11-30 10:1...	2021-11-30 10:...
LAZADA_FULFI...	LAZADA_FULFI...	ACTIVE	2021-08-24 20:...	2021-08-24 20...

Scheduler Edit: This screen shows the configuration for a specific scheduler entry. A red box highlights the "Details" tab. The "Cron Expression" tab is also visible. The "Scheduler Name" is set to "SHOPEE_TEST_1". The "Time Interval" is set to "5 minutes". Other fields include "Branch List" (SHOPEE IZAN BRANCH CLOUD), "Time Range Field" (create time), "Page Size" (10), and "Status" (ACTIVE). An "Email" field contains "firdaushayali@wavelet.net". A "Remove" button is at the bottom right.

A.8.9. Menu 08 - Search Filter

The image shows the "Search Filter Listing" screen. A red box highlights the "Search Filter" button in the sidebar.

Search Filter Listing: This screen displays a table of search filters. A red box highlights the "Search..." input field at the top right of the table header. Below the table are "Columns" and "Filters" dropdowns.

Name 1 ↓	Code	Status	Date Created 2 ↓
test	test-code	ACTIVE	2022-05-25 20:49:02
desktop	desktop	ACTIVE	2022-05-25 20:35:44
TestA	testA	ACTIVE	2022-06-29 14:36:27
Laptops filter	laptop-filter	ACTIVE	2022-05-25 16:01:32
Accessories filter	accessories-filter	ACTIVE	2022-05-25 18:48:30

The screenshot shows two pages of the akaun applet. On the left is the 'Search Filter Listing' page, which displays a table of search filters with columns for Name, Code, and Status. The table includes rows for 'test', 'desktop', 'TestA', 'Laptops filter', and 'Accessories filter', all marked as ACTIVE. On the right is the 'Search Filter Create' page, which has fields for 'Search Filter Code' (set to 'Main'), 'Search Filter Name' (empty), and a dropdown for 'Status' (set to 'ACTIVE'). A red box highlights the 'Main' section of the create page.

This screenshot shows the same two pages as the previous one. The 'Search Filter Listing' page remains the same. On the right, the 'Search Filter Edit' page is shown for the 'test' filter. It displays the 'Main' section with the code 'test-code' and name 'test'. Below this are sections for 'Status' (set to 'ACTIVE'), 'Created By' (alihassan@wavelet.net), 'Created Date' (25/05/2022, 8:49 pm), 'Modified By' (bagty@wavelet.net), and 'Modified Date' (29/06/2022, 2:35 pm). A red box highlights the 'Main' section of the edit page, and another red box highlights the 'Delete' button at the bottom right.

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

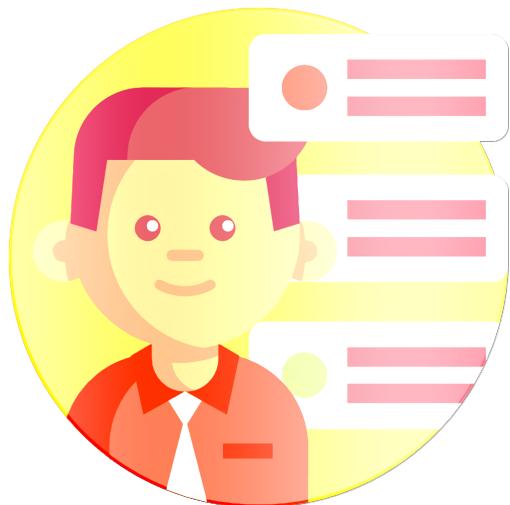
A.8.13. Pricing

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



Designed by [pngtree](#)

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

A.13.2. Modules

This applet is used in the following modules:

- Section 4.2, “Core Module”
- Section 4.3, “Accounting Module”
- Section 4.4, “Inventory Module”
- Section 4.5, “Point of Sales Module”
- Section 4.6, “Manufacturing Module”
- Section 4.7, “Membership Module”
- Section 4.8, “Referral Module”
- Section 4.9, “Customer Relationship Management”
- Section 4.10, “Contact Center Module”
- Section 4.11, “Digital Marketing Module”
- Section 4.12, “Marketplace Connector Module”
- Section 4.13, “Delivery Fulfillment Module”
- Section 4.14, “CP Commerce Module”
- Section 4.15, “Procure to Pay Module”
- Section 4.16, “HR Module”
- Section 4.17, “Order To Cash Module”

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

A.13.3. Menu 01 - e.g. Sales Orders Listing

A.13.4. Menu 02 - e.g. Line Items

A.13.5. Permission Settings

A.13.6. Personalization

A.13.7. Related Applets

This applet also depends on the following applets:

- Applet 1
- Applet 2

The following applets depends on this applet:

- Applet 3
- Applet 4

Also see

A.13.8. Pricing

A.13.9. Release Note

A.13.10. Roadmap

A.14. Organization Applet

A.14.1. Introduction



You can use this applet to create / update / delete companies, branches and locations.

A.14.2. Modules

This applet is used in the following modules:

- [Section 4.2, “Core Module”](#)
- [Section 4.3, “Accounting Module”](#)
- [Section 4.4, “Inventory Module”](#)
- [Section 4.5, “Point of Sales Module”](#)
- [Section 4.6, “Manufacturing Module”](#)
- [Section 4.7, “Membership Module”](#)
- [Section 4.8, “Referral Module”](#)
- [Section 4.9, “Customer Relationship Management”](#)
- [Section 4.10, “Contact Center Module”](#)
- [Section 4.11, “Digital Marketing Module”](#)
- [Section 4.12, “Marketplace Connector Module”](#)
- [Section 4.13, “Delivery Fulfillment Module”](#)
- [Section 4.14, “CP Commerce Module”](#)
- [Section 4.15, “Procure to Pay Module”](#)
- [Section 4.16, “HR Module”](#)
- [Section 4.17, “Order To Cash Module”](#)
- [Section 4.18, “Warehouse Management Module”](#)
- [Section 4.19, “Customer Data Platform”](#)
- [Section 4.20, “PGW Module”](#)
- [Section 4.21, “Chatbot Module”](#)

- Section 4.22, “Process Automation Module”
- Section 4.23, “Datalake Module”

A.14.3. Menu 01 - e.g. Sales Orders Listing

A.14.4. Menu 02 - e.g. Line Items

A.14.5. Permission Settings

A.14.6. Personalization

A.14.7. Related Applets

This applet also depends on the following applets:

- Applet 1
- Applet 2

The following applets depends on this applet:

- Applet 3
- Applet 4

Also see

A.14.8. Pricing

A.14.9. Release Note

A.14.10. Roadmap

A.15. Payment Channel Applet

A.15.1. Introduction



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

A.15.2. Modules

This applet is used in the following modules:

- [Section 4.2, “Core Module”](#)
- [Section 4.3, “Accounting Module”](#)
- [Section 4.4, “Inventory Module”](#)
- [Section 4.5, “Point of Sales Module”](#)
- [Section 4.6, “Manufacturing Module”](#)
- [Section 4.7, “Membership Module”](#)
- [Section 4.8, “Referral Module”](#)
- [Section 4.9, “Customer Relationship Management”](#)
- [Section 4.10, “Contact Center Module”](#)
- [Section 4.11, “Digital Marketing Module”](#)
- [Section 4.12, “Marketplace Connector Module”](#)
- [Section 4.13, “Delivery Fulfillment Module”](#)
- [Section 4.14, “CP Commerce Module”](#)
- [Section 4.15, “Procure to Pay Module”](#)
- [Section 4.16, “HR Module”](#)
- [Section 4.17, “Order To Cash Module”](#)
- [Section 4.18, “Warehouse Management Module”](#)
- [Section 4.19, “Customer Data Platform”](#)

- [Section 4.20, “PGW Module”](#)
- [Section 4.21, “Chatbot Module”](#)
- [Section 4.22, “Process Automation Module”](#)
- [Section 4.23, “Datalake Module”](#)

A.15.3. Menu 01 - e.g. Sales Orders Listing

A.15.4. Menu 02 - e.g. Line Items

A.15.5. Permission Settings

A.15.6. Personalization

A.15.7. Related Applets

This applet also depends on the following applets:

- Applet 1
- Applet 2

The following applets depends on this applet:

- Applet 3
- Applet 4

Also see

A.15.8. Pricing

A.15.9. Release Note

A.15.10. Roadmap

A.16. 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

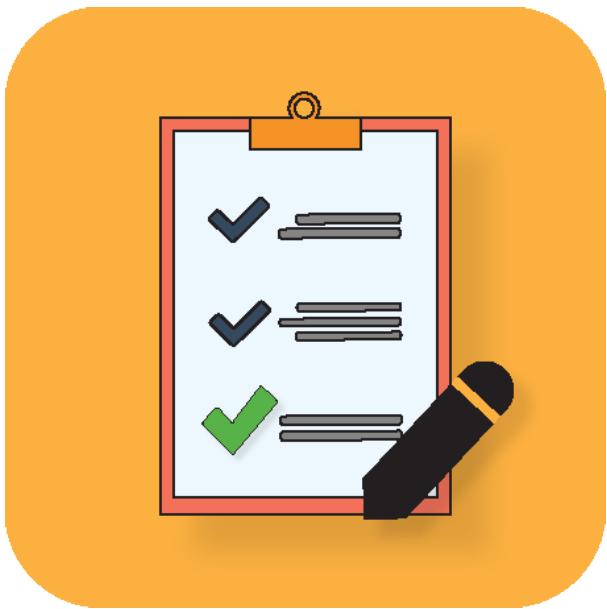
A.16.8. Pricing

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

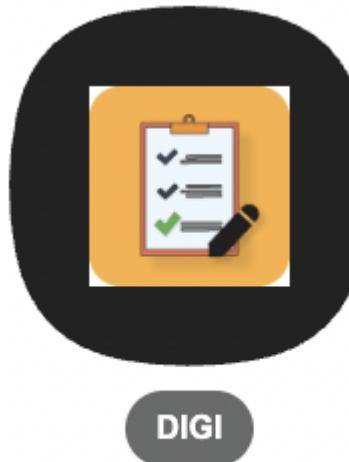
This applet is used in the following modules:

- [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



Stock Take

A.17.3.2. Go to the Stock Take Session

No.	Session Name	Session Code	Location	Company	Status	Start Date	Modified Date
1	testShaiqot	testShaiqot	AGROMART-PAKSO...	AGROTECH PRO LA...	OPEN	2022-05-13 16:07:41	2022-05-23
2	TestRawan	TestRawan	DAYANGTEST-1	DRAFTCTEST	OPEN	2022-04-28 11:52:27	2022-05-13
3	TTDI Store - 7/4/2022	TTDI STore	ADDRESSLOCATION	Azri Company Test	OPEN	2022-04-07 11:23:04	2022-04-14
4	ravantest11	ravantest11	ADDRESSLOCATION	Azri Company Test	CLOSED	2022-02-17 21:39:54	2022-02-18
5	ravantest2	ravantest2	ADDRESSLOCATION	Azri Company Test	OPEN	2022-02-17 19:16:31	2022-04-07
6	FEB 2022	FEB 2022	AGROMART-PAKSO...	AGROTECH PRO LA...	CLOSED	2022-02-04 12:13:49	2022-02-17
7	TEST1111	TEST1111	DAYANGTEST-1	DRAFTCTEST	OPEN	2022-01-14 10:46:26	2022-01-14
8	ida test	ida test	stock branch	IDA COMPANY test@8	OPEN	2021-12-14 14:50:02	2022-05-11
9	Stock Session August	Stock Session August	DAYANGTEST-1	DRAFTCTEST	CLOSED	2021-08-27 12:27:21	2022-02-14
10	Sunway-Aug 2021	Sunway-Aug 2021	TEST	CELEB BEAUTY & S...	OPEN	2021-08-19 15:45:02	2022-02-14

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

The screenshot shows the Stock Take Applet interface. On the left, there is a sidebar with various icons. The main area has two tabs: "Session Listing" and "Stock Take Applet". The "Session Listing" tab is active, showing a table of existing sessions with columns: No., Session Name, Session Code, Location, and Actions. A red box highlights the "Add" button (+) in the top-left corner of this table. To the right, a modal window titled "Create Session" is open, also with a red border. It contains fields for Session Name (* STOCK - JUNE 2022), Session Code (* JUNE -2022), Location (L-SETAPAK | L-SETAPAK), Company (Celmonze Sdn Bhd), Description (STOCK SESSION), and Status (Open). A blue "CREATE" button is at the top right of the modal.

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

The screenshot shows the Stock Take Applet interface. The "Session Listing" tab is active, displaying a table of sessions. A red box highlights the "Add" button (+) in the top-left corner of the table. To the right, a modal window titled "Edit Session" is open, specifically on the "Devices" tab. This tab has a red border. It contains a table with columns: No., Device Name, Device Code, and Brand. One row is listed: 1 Pocophone Piji PP95 Pocophone. A "SAVE" button is at the top right of the modal. The "Details" tab is also visible in the modal header.

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

The screenshot shows the Stock Take Applet interface. On the left, there's a sidebar with icons for settings, refresh, and other system functions. The main area has a purple header bar with the title "Stock Take Applet". Below the header, there are tabs for "Edit Session", "Details", "Devices", "Records", and "Report". The "Devices" tab is currently selected. A modal window titled "Create Device Session" is open, prompting for "Device Code & Name". It includes a search bar, a dropdown for "Brand" (set to "Brand"), and a dropdown for "Status" (set to "Active"). A red box highlights the list of devices being searched, which includes "RF95 Razer Fizi", "Bukit Setengkol Nik", "Test123 Test123", and "XH95 Xiaomi Hafizhi Falah".

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

This screenshot shows the Stock Take Applet interface again. On the left, the sidebar and purple header bar are visible. The main area has two tables side-by-side. The left table, titled "Session Listing", shows a list of sessions with columns for "No.", "Session Name", "Session Code", and "Location". The right table, titled "Edit Session", shows a list of devices with columns for "No.", "Device Name", "Device Code", and "Brand". A red box highlights the second row in the "Edit Session" table, which lists "Priya" as the device name, "Priya" as the device code, and "Priya" as the brand.

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

The screenshot shows the Stock Take Applet interface. On the left, there is a sidebar with icons for Home, Sessions, Reports, and Settings. The main area has a title bar "Stock Take Applet". Below the title bar are two tabs: "Edit Session" and "Edit Device Session". The "Edit Session" tab is active, showing a table with columns "No.", "Device Name", "Device Code", and "Brand". There are two entries: 1. Pocophone Piji, PP95, Pocophone and 2. Priya, Priya, Priya. A red box highlights the "Records" tab in the top navigation bar of the "Edit Device Session" panel. The "Edit Device Session" panel also includes a search bar "Scan code..", a "SCAN" button, and a table for recording items.

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

This screenshot is similar to the one above, showing the Stock Take Applet interface. The "Edit Device Session" panel now has a red box around the "Scan code.." input field. The "SCAN" button is also highlighted with a blue border.

A.17.3.9. Auto-save feature is available

The screenshot shows the Stock Take Applet interface. On the left, there is a vertical toolbar with icons for search, refresh, and other functions. The main area has two tabs: "Session Listing" and "Edit Session".

Session Listing Tab:

- Search bar: "Search name and code"
- Rows dropdown: "10"
- Pagination: "page 2 of 4"
- Table columns: No., Session Name, Session Code, Location, Create Date, Last Update, Status.
- Table rows (partial list):
 - No. 11: Bangsar - Aug 2021, Bangsar - Aug 2021, L-123, LOCATION, 2021-08-10, 2021-08-10, ACTIVE
 - No. 12: Aug 2021, Aug 2021, WAREHOUSE 001 - PJ, LOCATION, 2021-08-10, 2021-08-10, ACTIVE
 - No. 13: Adri, 7888, CREATELOCATION, ADDRESSLOCATION, 2021-08-10, 2021-08-10, ACTIVE
 - No. 14: Stock Take July, Stock Take July, stock branch, ADDRESSLOCATION, 2021-08-10, 2021-08-10, ACTIVE
 - No. 15: Stock Take March, March21, ADDRESSLOCATION, ADDRESSLOCATION, 2021-08-10, 2021-08-10, ACTIVE
 - No. 16: LH-HQ, LH-HQ - Apr 2021, LOOB HOLDING, LOCATION, 2021-08-10, 2021-08-10, ACTIVE
 - No. 17: L-TONN CABLE - Ma..., L-TONN CABLE, LOCATION, LOCATION, 2021-08-10, 2021-08-10, ACTIVE
 - No. 18: CTS_PUC_WRH - M..., Puchong Warehouse, LOCATION, LOCATION, 2021-08-10, 2021-08-10, ACTIVE
 - No. 19: LH-HQ - Mar 2021, LOOB HOLDING, LOCATION, LOCATION, 2021-08-10, 2021-08-10, ACTIVE
 - No. 20: STOCK - JUNE 2022, JUNE -2022, L-SETAPAK, LOCATION, 2021-08-10, 2021-08-10, ACTIVE

Edit Session Tab:

- Back arrow icon
- Tab navigation: Details, Devices, Records, Report (highlighted)
- Search bar: "Search name and code"
- Table columns: No., Item Name, Item Code, Device Name, Create Date, Last Update, Status.
- Table rows (partial list):
 - No. 1: DS-KLANG APRIL 2..., DS-KLANG APRIL 2..., DS-KLANG, 2021-08-10, 2021-08-10, ACTIVE
 - No. 2: TESTING SESSION, TESTING SESSION, DS-SETAPAK CENT..., 2021-08-10, 2021-08-10, ACTIVE
 - No. 3: DS SETAPAK MARC..., DS SETAPAK MARC..., DS-SETAPAK CENT..., 2021-08-10, 2021-08-10, ACTIVE
 - No. 4: WAVELET - TESTIN..., WAVELET - TESTIN..., DS-DHOUSE, 2021-08-10, 2021-08-10, ACTIVE
 - No. 5: WAVELET - TESTIN..., WAVELET - TESTIN..., DS-DANGA BAY, 2021-08-10, 2021-08-10, ACTIVE
 - No. 6: WAVELET - TESTING, WAVELET - TESTING, DS-DANGA BAY, 2021-08-10, 2021-08-10, ACTIVE
 - No. 7: DS - BAYAN BARU J..., DS BAYAN BARU JA..., DS-BAYAN BARU, 2021-08-10, 2021-08-10, ACTIVE
 - No. 8: DS-Setapak Testing ..., DS-Setapak Testing ..., DS-SETAPAK CENT..., 2021-08-10, 2021-08-10, ACTIVE
 - No. 9: DS - SUNWAY PYRA..., DS - SUNWAY PYRA..., DS-SUNWAY PYRA..., 2021-08-10, 2021-08-10, ACTIVE
 - No. 10: DS-API API - Dec 20..., DS-API API - Dec 20..., DS-API API, 2021-08-10, 2021-08-10, ACTIVE

A red box highlights the "SAVE" button in the top right corner of the "Edit Session" tab.

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

The screenshot shows the Stock Take Applet interface with the "Report" tab selected. The "Edit Session" tab is still visible on the right.

Report Tab:

- Regenerate button
- Upload Reason button
- Search bar: "Search name and code"
- Report Type dropdown: "Active Items" (highlighted with a red box)
- Item Code input field
- Item Name input field
- Reset button
- Search button

A red box highlights the "Active Items" dropdown in the "Report Type" section.

A.17.3.11. Click Upload Reason

The screenshot shows the Stock Take Applet interface. On the left, there are several icons: a clipboard, a list, a search, a refresh, a device, a grid, a gear, and a person. The main area has two tabs: 'Session Listing' and 'Edit Session'. The 'Session Listing' tab shows a table with columns: No., Session Name, Session Code, Location, and Date. The 'Edit Session' tab shows a table with columns: N..., Item Name, Item Code, Min Qu..., Max Qu... The 'Report' tab is selected. At the bottom of the 'Edit Session' section, there is a 'REGENERATE' button, an 'UPLOAD REASON' button (which is highlighted with a red box), and a 'SAVE' button.

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

The screenshot shows the Stock Take Applet interface with the 'Report' tab selected. It includes the same sidebar and session listing table as the previous screenshot. On the right, there is a 'Upload report excel file' section with a 'Report Type' dropdown set to 'Active items' and an 'EXPORT' button (highlighted with a red box). Below it is a dashed box for dropping files and a 'Fill the reason' input field.

A.17.3.13. An excel will be dowloaded

The screenshot shows the akaun Stock Take Applet interface. On the left, there's a sidebar with icons for Home, Details, Devices, Records, and Report. The main area has tabs for 'Edit Session' (selected), 'Details', 'Devices', 'Records', and 'Report'. Under 'Edit Session', there are buttons for 'REGENERATE' and 'UPLOAD REASON'. A search bar says 'Search name and code'. Below it is a table with columns: N..., Item Name, Item Code, Min Qua..., Max Qua... and rows numbered 1 to 7. To the right, there's a section for 'Upload report excel file' with a dropdown for 'Report Type' set to 'Active items' and an 'EXPORT' button. A dashed box indicates where to drop a file, and a 'Fill the reason' button is at the bottom.

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

The screenshot shows an Excel spreadsheet titled 'TESTING SESSION_Stock_Variance_Report (1)'. The table has the following structure:

	itemName	ItemCode	MinQty	MaxQty	TotalQty	EMPQty	variance1	variance2	systemSerial	STSerialNum	SNVariance	costValue	totalCost	reason
1	itemName	ItemCode	MinQty	MaxQty	TotalQty	EMPQty	variance1	variance2	systemSerial	STSerialNum	SNVariance	costValue	totalCost	
2			0	0		0	0	0				0	0	
3			0	0		0	0	0				0	0	
4			0	0		0	0	0				0	0	
5			0	0		0	0	0				0	0	
6			0	0		0	0	0				0	0	
7			0	0		0	0	0				0	0	
8			0	0		0	0	0				0	0	
9			0	0		0	0	0				0	0	
10			0	0		0	0	0				0	0	
11			0	0		0	0	0				0	0	
12			0	0		0	0	0				0	0	
13			0	0		0	0	0				0	0	
14			0	0		0	0	0				0	0	
15			0	0		0	0	0				0	0	
16			0	0		0	0	0				0	0	
17			0	0		0	0	0				0	0	
18			0	0		0	0	0				0	0	
19			0	0		0	0	0				0	0	
20			0	0		0	0	0				0	0	
21			0	0		0	0	0				0	0	
22			0	0		0	0	0				0	0	
23			0	0		0	0	0				0	0	
24			0	0		0	0	0				0	0	
25			0	0		0	0	0				0	0	
26			0	0		0	0	0				0	0	
27			0	0		0	0	0				0	0	
28			0	0		0	0	0				0	0	
29			0	0		0	0	0				0	0	
30			0	0		0	0	0				0	0	
31			0	0		0	0	0				0	0	
32			0	0		0	0	0				0	0	
33			0	0		0	0	0				0	0	
34			0	0		0	0	0				0	0	
35			0	0		0	0	0				0	0	
36			0	0		0	0	0				0	0	
37			0	0		0	0	0				0	0	

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

The screenshot shows the 'Stock Take Applet' interface. In the center, there's a table for managing session details. On the right, there's a file upload area where 'TESTING SESSION_Stock_Variance_Report (1).xlsx' has been uploaded. A red box highlights the 'Fill the reason' button at the bottom of the upload panel.

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

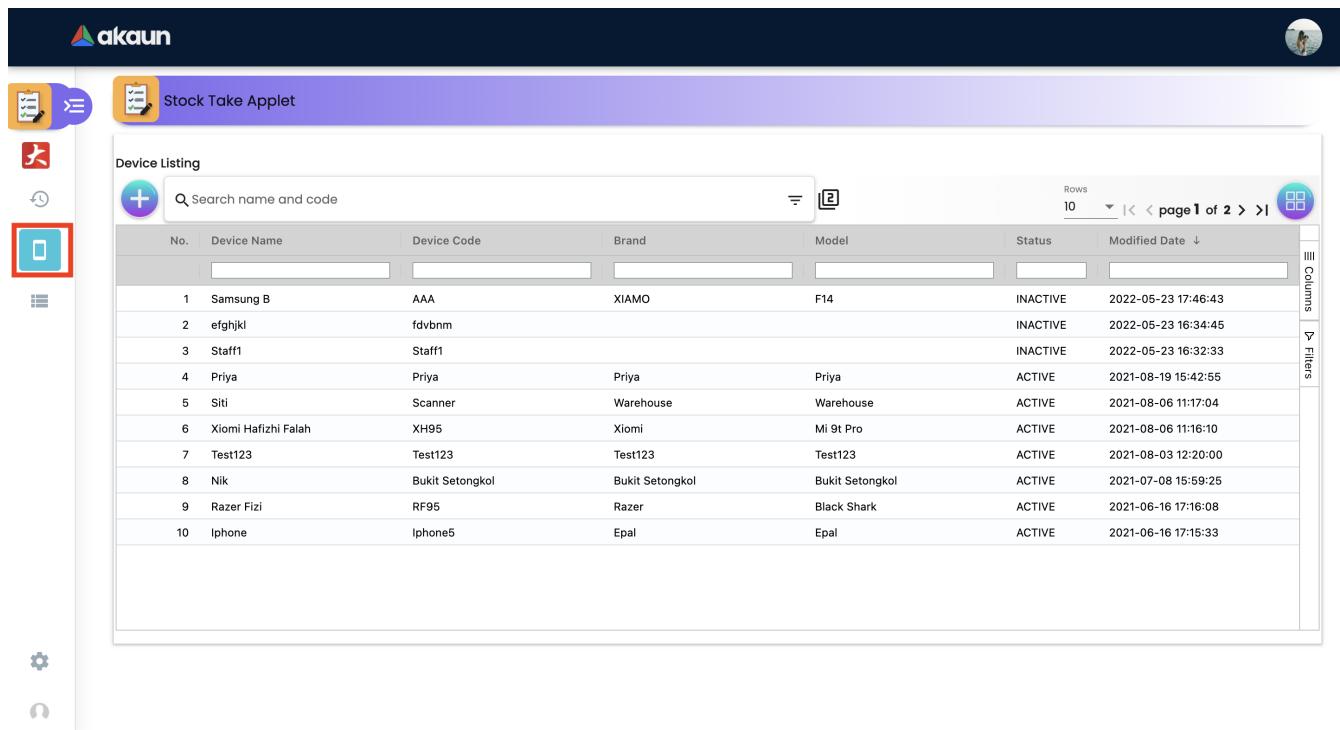
The screenshot shows the 'Stock Take Applet' interface. On the left, there's a 'Session Listing' table. On the right, the 'Edit Session' tab is active, showing form fields for Session Name, Session Code, Location, Company, Description, and Status. The 'Status' field is set to 'Closed'. The 'SAVE' button is highlighted with a red box.

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

7	DS - BAYAN BARU JA...	DS BAYAN BARU JAN ...	DS-BAYAN BARU	Digi Telecommunicati...	CLOSED	2022-01-30 10:18:38	2022-01-30 21:55:16
8	DS-Setapak Testing (2)	DS-Setapak Testing (2)	DS-SETAPAK CENTRAL	Digi Telecommunicati...	CLOSED	2021-12-14 11:20:00	2022-01-14 18:02:06
9	DS - SUNWAY PYRAM...	DS - SUNWAY PYRAM...	DS-SUNWAY PYRAMID	Digi Telecommunicati...	CLOSED	2021-12-10 19:03:23	2021-12-23 11:01:31
10	DS-API API - Dec 2021	DS-API API - Dec 2021	DS-API API	Digi Telecommunicati...	CLOSED	2021-12-10 08:43:52	2021-12-10 17:20:25

A.17.4. Menu 02 - Devices

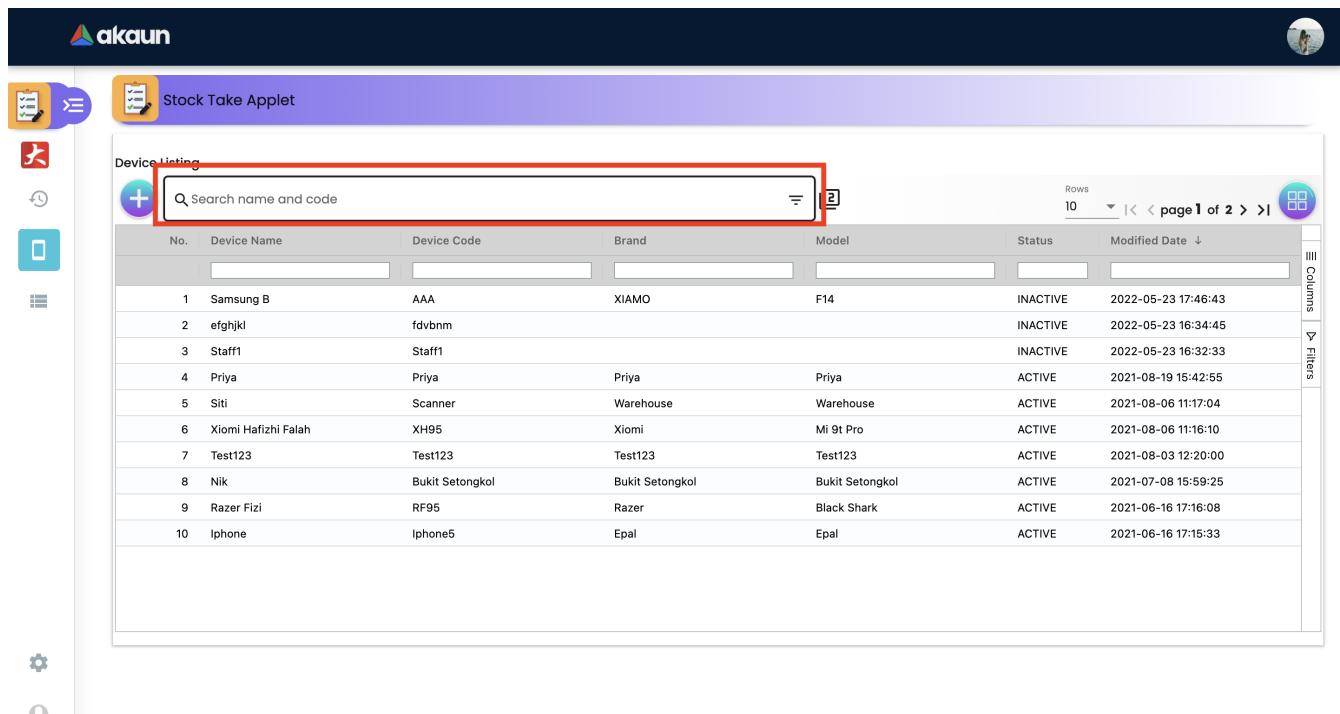
2.1 Go to the device menu to create Device. The Device will be used to assign to the stock take session



The screenshot shows the 'Stock Take Applet' interface with the 'Device Listing' page selected. The search bar at the top is highlighted with a red box. The table below lists 10 devices with columns for No., Device Name, Device Code, Brand, Model, Status, and Modified Date.

No.	Device Name	Device Code	Brand	Model	Status	Modified Date
1	Samsung B	AAA	XIAMO	F14	INACTIVE	2022-05-23 17:46:43
2	efghjkl	fdvbnm			INACTIVE	2022-05-23 16:34:45
3	Staff1	Staff1			INACTIVE	2022-05-23 16:32:33
4	Priya	Priya	Priya	Priya	ACTIVE	2021-08-19 15:42:55
5	Siti	Scanner	Warehouse	Warehouse	ACTIVE	2021-08-06 11:17:04
6	Xiomi Hafizhi Falah	XH95	Xiomi	Mi 9t Pro	ACTIVE	2021-08-06 11:16:10
7	Test123	Test123	Test123	Test123	ACTIVE	2021-08-03 12:20:00
8	Nik	Bukit Setongkol	Bukit Setongkol	Bukit Setongkol	ACTIVE	2021-07-08 15:59:25
9	Razer Fizi	RF95	Razer	Black Shark	ACTIVE	2021-06-16 17:16:08
10	Iphone	Iphone5	Epal	Epal	ACTIVE	2021-06-16 17:15:33

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



The screenshot shows the 'Stock Take Applet' interface with the 'Device Listing' page selected. The search bar at the top is highlighted with a red box. The table below lists 10 devices with columns for No., Device Name, Device Code, Brand, Model, Status, and Modified Date.

No.	Device Name	Device Code	Brand	Model	Status	Modified Date
1	Samsung B	AAA	XIAMO	F14	INACTIVE	2022-05-23 17:46:43
2	efghjkl	fdvbnm			INACTIVE	2022-05-23 16:34:45
3	Staff1	Staff1			INACTIVE	2022-05-23 16:32:33
4	Priya	Priya	Priya	Priya	ACTIVE	2021-08-19 15:42:55
5	Siti	Scanner	Warehouse	Warehouse	ACTIVE	2021-08-06 11:17:04
6	Xiomi Hafizhi Falah	XH95	Xiomi	Mi 9t Pro	ACTIVE	2021-08-06 11:16:10
7	Test123	Test123	Test123	Test123	ACTIVE	2021-08-03 12:20:00
8	Nik	Bukit Setongkol	Bukit Setongkol	Bukit Setongkol	ACTIVE	2021-07-08 15:59:25
9	Razer Fizi	RF95	Razer	Black Shark	ACTIVE	2021-06-16 17:16:08
10	Iphone	Iphone5	Epal	Epal	ACTIVE	2021-06-16 17:15:33

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

Device Listing

Search name and code

Brand

Model

Status

Modified Date From... Modified Date To...

RESET SEARCH

Model Status Modified Date

	Model	Status	Modified Date
1	F14	INACTIVE	2022-05-23 17:46:43
2		INACTIVE	2022-05-23 16:34:45
3		INACTIVE	2022-05-23 16:32:33
4	Priya	ACTIVE	2021-08-19 15:42:55
5	Warehouse	ACTIVE	2021-08-06 11:17:04
6	Mi 9t Pro	ACTIVE	2021-08-06 11:16:10
7	Test123	ACTIVE	2021-08-03 12:20:00
8	Bukit Setengkol	ACTIVE	2021-07-08 15:59:25
9	Black Shark	ACTIVE	2021-06-16 17:16:08
10	Epal	ACTIVE	2021-06-16 17:15:33

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

Device Listing

No. Device... Device... Brand Model Status M...

No.	Device...	Device...	Brand	Model	Status	M...
1	samsungs3	samsung...	samsung	g32	ACTIVE	2022-06...
2	Samsung B	AAA	XIAMO	F14	INACTIVE	2022-05...
3	efghijkl	fdvbnm			INACTIVE	2022-05...
4	Staff1	Staff1			INACTIVE	2022-05...
5	Priya	Priya	Priya	Priya	ACTIVE	2021-08...
6	Siti	Scanner	Warehouse	Warehouse	ACTIVE	2021-08...
7	Xiomi Haf...	XH95	Xiomi	Mi 9t Pro	ACTIVE	2021-08...
8	Test123	Test123	Test123	Test123	ACTIVE	2021-08...
9	Nik	Bukit Set...	Bukit Set...	Bukit Set...	ACTIVE	2021-07...
10	Razer Fizi	RF95	Razer	Black Sh...	ACTIVE	2021-06...

Create Device

Device Name * xiomi123

Device Code * xiomi123

Brand xiomi

Model ss34

Status Active

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

Device Listing

No.	Device Name	Device Code	Brand	Model	Status	Modified Date
1	xomi123	xomi123	xiomi	ss34	ACTIVE	2022-06-07 18:04:00
2	samsungs3	samsung123	samsung	g32	ACTIVE	2022-06-07 17:50:54
3	Samsung B	AAA	XIAMO	F14	INACTIVE	2022-05-23 17:46:43
4	efghijkl	fdvbnm			INACTIVE	2022-05-23 16:34:45
5	Staff1	Staff1			INACTIVE	2022-05-23 16:32:33
6	Priya	Priya	Priya	Priya	ACTIVE	2021-08-19 15:42:55
7	Siti	Scanner	Warehouse	Warehouse	ACTIVE	2021-08-06 11:17:04
8	Xiomi Hafizhi Falah	XH95	Xiomi	Mi 9t Pro	ACTIVE	2021-08-06 11:16:10
9	Test123	Test123	Test123	Test123	ACTIVE	2021-08-03 12:20:00
10	Nik	Bukit Setongkol	Bukit Setongkol	Bukit Setongkol	ACTIVE	2021-07-08 15:59:25

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

Device Listing

No.	Device Name	Device Code	Brand	Model	Status	Modified Date
1	xomi123	xomi123	xiomi	ss34	ACTIVE	2022-06-07 18:04:00
2	samsungs3	samsung123	samsung	g32	ACTIVE	2022-06-07 17:50:54
3	Samsung B	AAA	XIAMO	F14	INACTIVE	2022-05-23 17:46:43
4	efghijkl	fdvbnm			INACTIVE	2022-05-23 16:34:45
5	Staff1	Staff1			INACTIVE	2022-05-23 16:32:33
6	Priya	Priya	Priya	Priya	ACTIVE	2021-08-19 15:42:55
7	Siti	Scanner	Warehouse	Warehouse	ACTIVE	2021-08-06 11:17:04
8	Xiomi Hafizhi Falah	XH95	Xiomi	Mi 9t Pro	ACTIVE	2021-08-06 11:16:10
9	Test123	Test123	Test123	Test123	ACTIVE	2021-08-03 12:20:00
10	Nik	Bukit Set... Bukit Setongkol	Bukit Set... Bukit Setongkol	Bukit Setongkol	ACTIVE	2021-07-08 15:59:25

Edit Device

Details

Device Name *	Device Code *
xomi12	xomi123
Brand	Model
xiomi	ss34
Status	
Active	
Created By	Created Date
	2022-06-07 18:04:00
	Modified Date

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

The screenshot shows the 'Stock Take Applet' interface. At the top, there are several icons: a clipboard with a pencil, a magnifying glass, a star, a clock, a phone, and a grid icon (highlighted with a red box). Below these are two tabs: 'Stock Take Applet' and another tab whose icon is partially visible. The main area is titled 'Report Listing'. It includes a search bar ('Search name and code'), a 'Download' button, and pagination controls ('Rows 10', 'page 1 of 2'). The table has columns for 'Location', 'Date ↓', 'Session Name', 'Status', and 'Status Variance'. The data table lists various locations with their counts in parentheses: L-SETAPAK (1), CREATELOCATION (3), DAYANGTEST-1(5), AGROMART-PAKSONG (2), stock branch (2), ADDRESSLOCATION (7), TEST (2), L-123 (1), WAREHOUSE 001 - PJ (1), and LOOB HOLDING (2). On the right side of the table, there are buttons for 'Columns' and 'Filters'.

A.17.6. Permission Settings

A.17.7. Personalization

Go to the Personalization Menu to add or edit Profile

The screenshot shows the 'Personalization' menu in the akaun application. The sidebar on the left is titled 'UCC APPLET' and contains links for 'STAGING_TENANT', 'INBOX', 'DASHBOARD', 'MY PROFILE', 'CONTACTS', 'BROADCAST', 'TASK QUEUE', 'CONFIGURATIONS', 'SETTINGS', and 'PERSONALIZATION' (which is highlighted with a blue background). The main content area is titled 'Personalization' and shows a placeholder profile picture for '' with the email 'arriyad@wavelet.net'. It includes sections for 'SYSTEM CONFIGURATION' (Field Settings, Default Selection), 'THEMES AND COLORS' (Preset Themes, Sidebar), and 'ACCESSIBILITY' (Color Assist, Easy Navigation). At the bottom right is a 'Report a Bug' button.

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

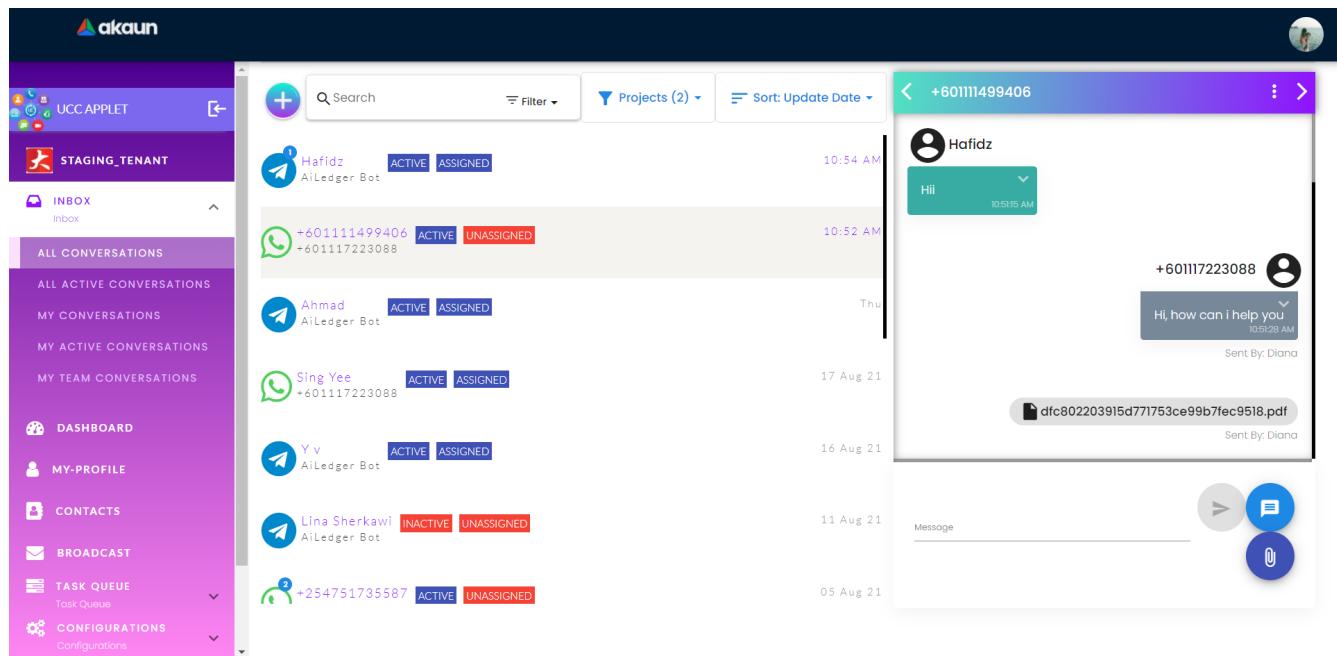
This applet is used in the following modules:

- [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 screenshot shows the akaun UCC APPLET interface. On the left, there's a sidebar with various navigation options like 'INBOX', 'DASHBOARD', 'MY PROFILE', etc. The main area displays a 'CUSTOMER DETAIL' card for 'Hafidz Hafidz'. Below it is a 'CONVERSATION' card for endpoint '+60111499406'. The conversation history shows messages from 'Hafidz' and 'Diana' with a PDF attachment. A message input field and a send button are at the bottom.

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.

This screenshot shows a mobile application interface. At the top, there's a header with a back arrow, the name 'Sing Yee', and three-dot menu icons. Below the header is a message box with a red 'X' icon and the text 'End Session'. The main area shows a conversation with a message from 'Arriyadi' saying 'hello' at 2:53:39 PM. Below the message is a timestamp 'Wed Aug 25 2021'. A blue rounded rectangle at the bottom indicates a 'New Session' starting at 'Wed Aug 25 2021 10:54:23 AM'. The conversation continues with a message from '+601117223088' saying 'hi' at 10:54:23 AM, sent by 'Arriyadi'.

A.20.3.1. All Conversations

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

The screenshot shows the 'All Conversations' section of the application. On the left, a sidebar lists various navigation options. The 'ALL CONVERSATIONS' option is selected, highlighted in purple. The main area displays a list of conversations with the following details:

Conversant	Status	Assigned To	Last Activity
Sing Yee +601117223088	ACTIVE	ASSIGNED	10:54 AM
Hafidz AiLedger Bot	ACTIVE	ASSIGNED	Tue
+601111499406 +601117223088	ACTIVE	UNASSIGNED	Tue
Ahmad AiLedger Bot	ACTIVE	ASSIGNED	Thu
Y V AiLedger Bot	ACTIVE	ASSIGNED	16 Aug 21
Lina Sherkawi AiLedger Bot	INACTIVE	UNASSIGNED	11 Aug 21
+254751735587 +601117223088	ACTIVE	UNASSIGNED	05 Aug 21

A.20.3.2. All Active Conversations

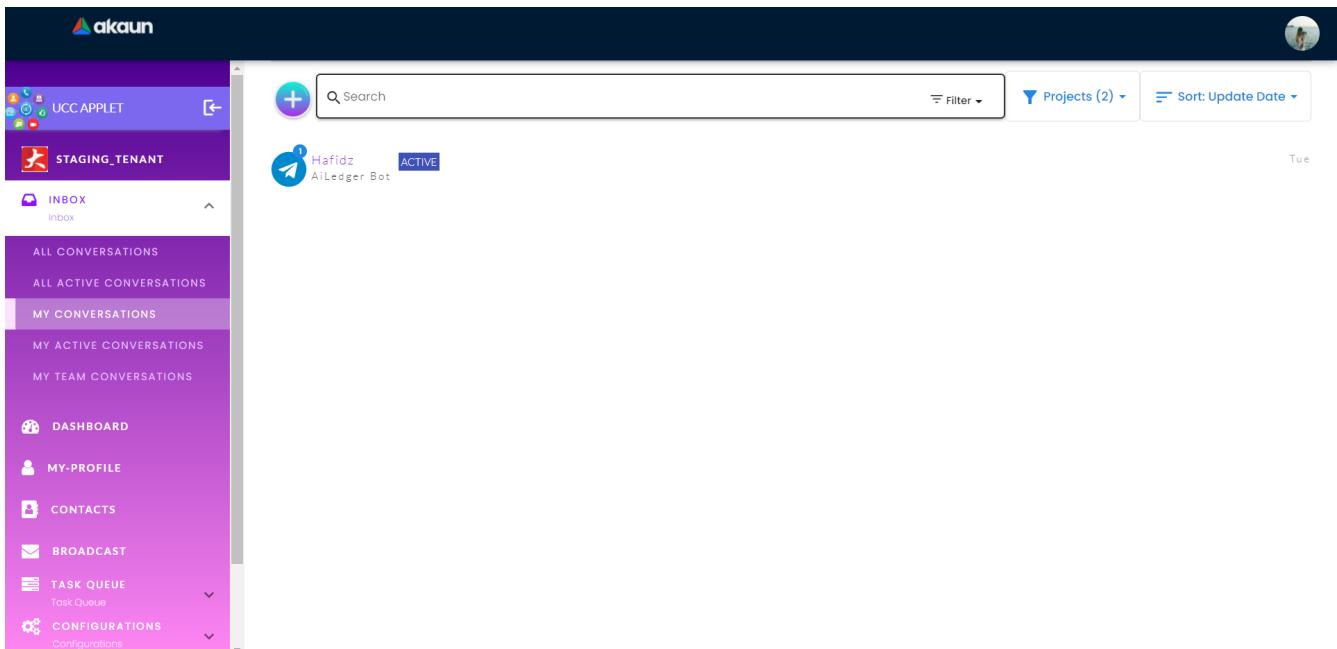
By clicking All Active Conversations, the user can view all active sessions conversation under this menu

The screenshot shows the 'All Active Conversations' section of the application. The sidebar is identical to the previous screenshot. The main area displays a list of conversations with the following details:

Conversant	Status	Assigned To	Last Activity
Sing Yee +601117223088	ASSIGNED		10:54 AM
Hafidz AiLedger Bot	ASSIGNED		10:54 AM
+601111499406 +601117223088	UNASSIGNED		10:52 AM
Ahmad AiLedger Bot	ASSIGNED		Thu
Y V AiLedger Bot	ASSIGNED		16 Aug 21
+254751735587 +601117223088	UNASSIGNED		05 Aug 21
+60199145647	ASSIGNED		02 Aug 21

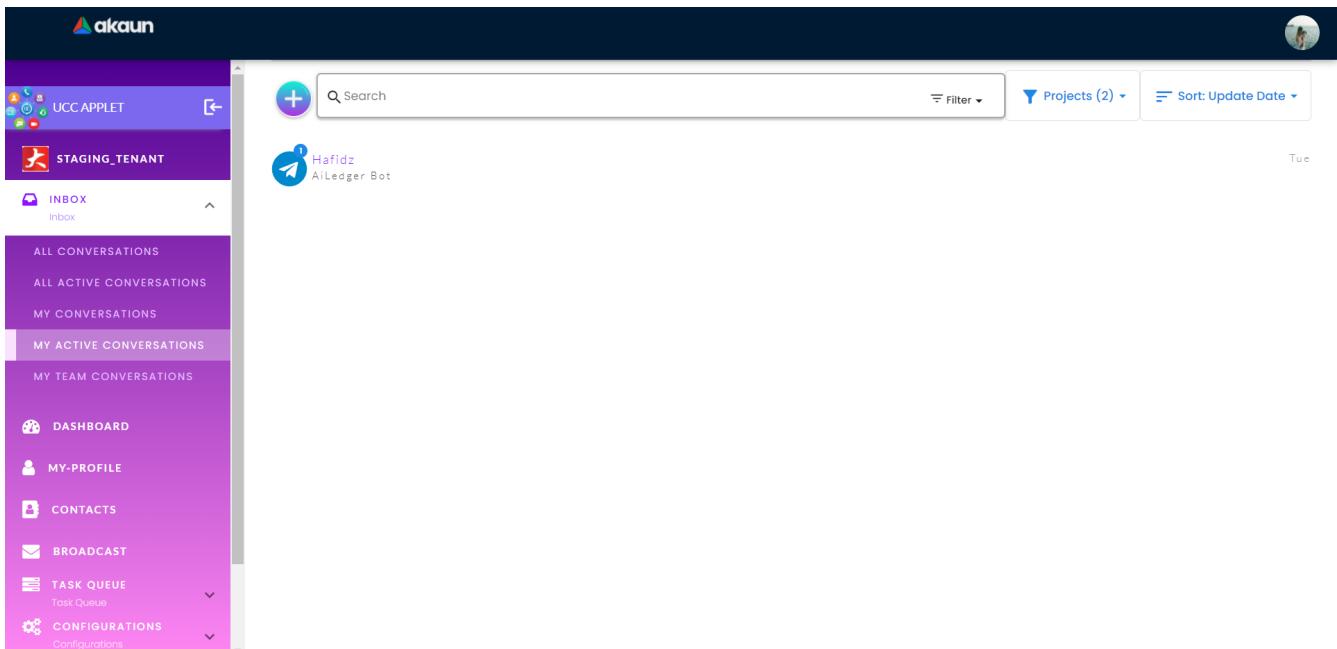
A.20.3.3. My Conversations

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



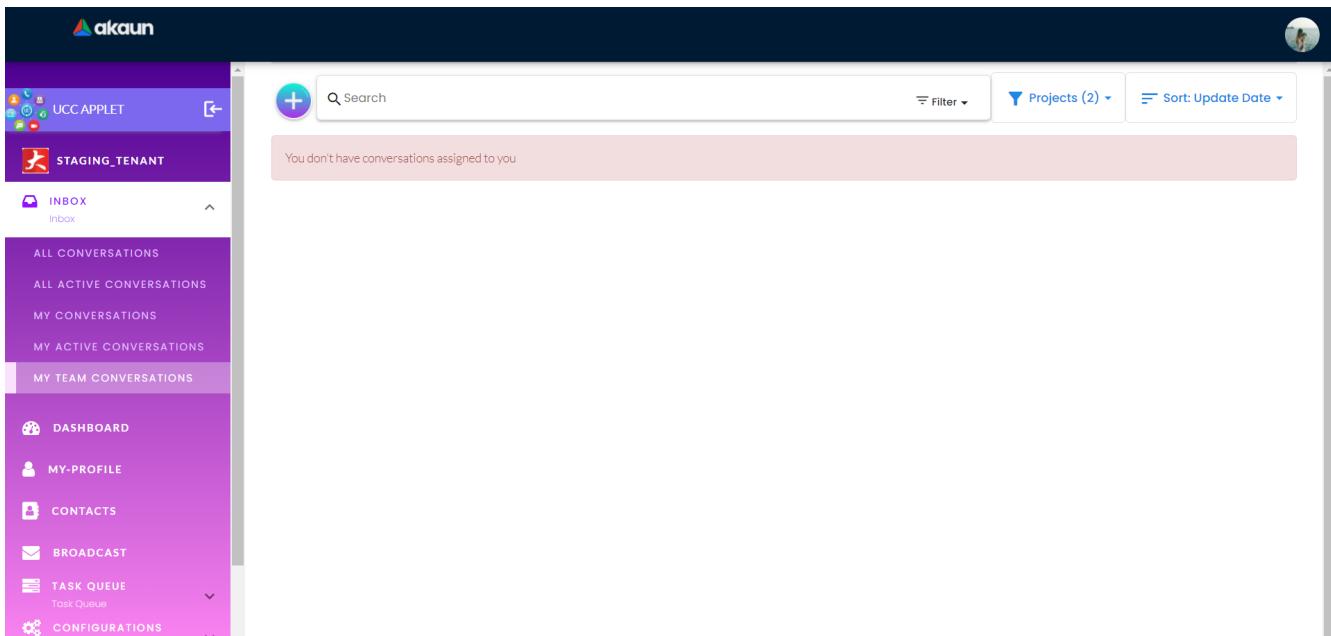
A.20.3.4. My Active Conversations

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



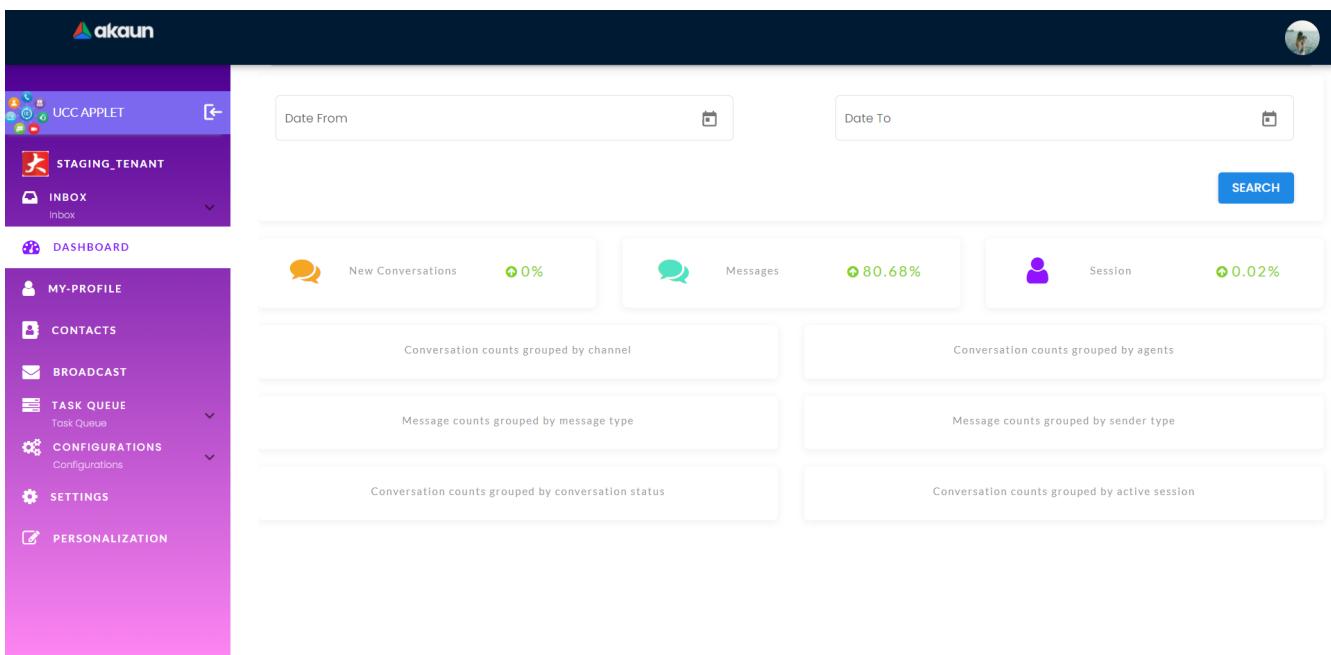
A.20.3.5. My Team Conversations

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

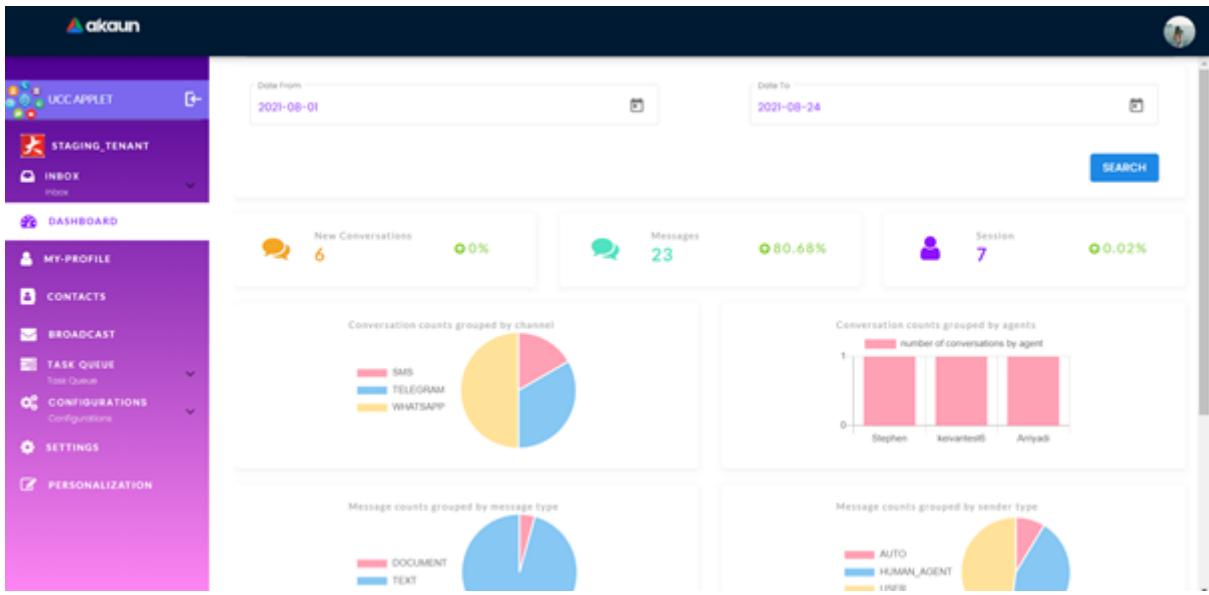


A.20.4. Menu 02 - Dashboard

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.

The screenshot shows the 'Contacts' list page. The sidebar includes the same navigation links as the dashboard. The main area has a search bar and a table with columns: Contact Name, ID No, ID Type, Phone, Email, and Description. The table lists numerous contacts, mostly starting with '+6011'. There are also 'Rows' and 'Columns' dropdowns, a 'Filters' button, and a scroll bar.

Contact Name ↑	ID No	ID Type	Phone	Email	Description
1111222	1111222	SMS	1111222		
2222222	2222222	SMS	2222222		
+601025443701	+60102544370	SMS	+60102544370		
+6010254437011	+60102544370	WHATSAPP	+60102544370		
+6011109347891	+601110934789	WHATSAPP	+601110934789		
+601128016828	+601128016828	SMS	+601128016828		
+6011280168281	+601128016828	WHATSAPP	+601128016828		
+601222071961	+60122207196	WHATSAPP	+60122207196		
+60122219153	+60122219153	WHATSAPP	+60122219153		
+601231472110	+60123147211	WHATSAPP	+60123147211		

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.

The screenshot shows the akaun UCC APPLET interface with the following details:

- Header:** akaun
- Left Sidebar:** UCC APPLET, STAGING_TENANT, INBOX (Inbox), DASHBOARD, MY-PROFILE, CONTACTS, BROADCAST, TASK QUEUE (Task Queue), CONFIGURATIONS (Configurations), SETTINGS, PERSONALIZATION.
- Current Page:** Contacts
- Table Headers:** Contact Name ↑, ID No, ID Type, Phone, Email, Description
- Table Data:** A list of contacts with their respective ID numbers, contact types (SMS or WHATSAPP), and phone numbers.
- Page Controls:** Rows 10, page 1 of 7, navigation icons.
- Right Sidebar:** Columns, Filters.

Contact Name ↑	ID No	ID Type	Phone	Email	Description
1111222	1111222	SMS	1111222		
2222222	2222222	SMS	2222222		
+601025443701	+60102544370	SMS	+60102544370		
+6010254437011	+60102544370	WHATSAPP	+60102544370		
+6011109347891	+601110934789	WHATSAPP	+601110934789		
+601128016828	+601128016828	SMS	+601128016828		
+6011280168281	+601128016828	WHATSAPP	+601128016828		
+601222071961	+60122207196	WHATSAPP	+60122207196		
+60122219153	+60122219153	WHATSAPP	+60122219153		
+601231472110	+60123147211	WHATSAPP	+60123147211		

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.

The screenshot shows the 'All Task Queue' page. The left sidebar has a purple header 'UCC APPLET' and sections for 'STAGING_TENANT', 'INBOX', 'DASHBOARD', 'MY-PROFILE', 'CONTACTS', 'BROADCAST', 'TASK QUEUE' (selected), 'ALL TASK QUEUE' (selected), 'TEAM TASK QUEUE', 'MY TASK QUEUE', 'CONFIGURATIONS', 'SETTINGS', and 'PERSONALIZATION'. The main area title is 'All Task Queue'. It features a search bar, a table with columns: Queue Code ↑, Task Code, Team Code, Agent Code, Description, and Create Date, and a footer with 'Rows 10' and navigation buttons.

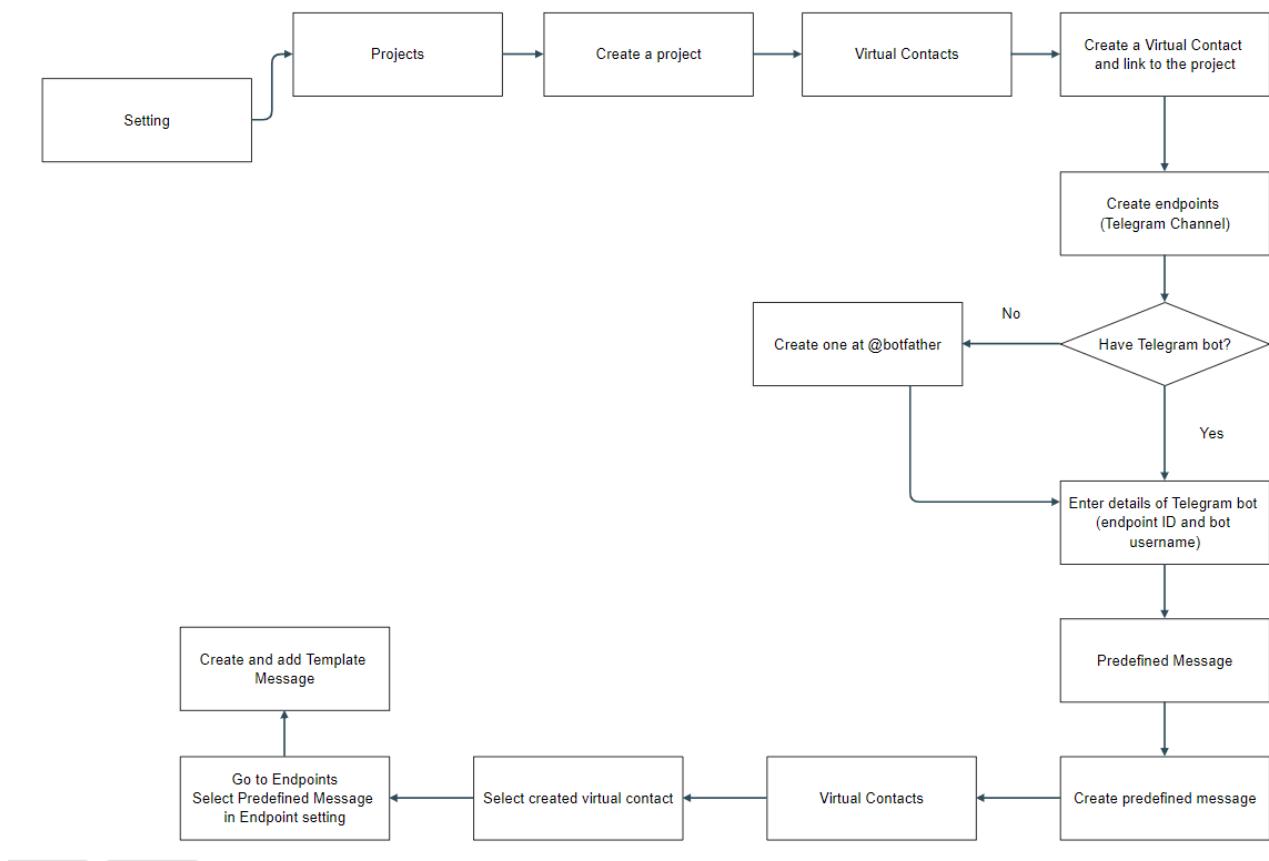
From team task queue, the agent can choose some tasks and click “assign to me”.

The screenshot shows the 'Team Task Queue' page. The left sidebar is identical to the previous one. The main area title is 'Team Task Queue'. It features a search bar, a table with columns: Queue Code ↑, Task Code, Team Code, Description, Create Date, and Update Date, and a message 'No Rows To Show'. A 'Filter' button and an 'Assign To Me' button are at the top right.

The screenshot shows the 'My Task Queue' page. The left sidebar is identical to the previous ones. The main area title is 'My Task Queue'. It features a search bar, a table with columns: Queue Code ↑, Task Code, Description, Create Date, and Update Date, and a message 'No Rows To Show'. A 'Filter' button and a 'Rows' dropdown are at the top right.

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).

The screenshot shows the 'Project Settings' page. On the left, there is a table listing several projects with columns for 'Project Name', 'Project Code', and 'Description'. The projects listed are: demo sample, Intan try, Sales project, singyee_test, Support, test123, and testing_project. On the right, there is a form for creating a new project. It includes fields for 'Project Name *' (with a note that the project code cannot be modified after creation), 'Project Code *' (disabled), 'Description', and 'Customer Details'. There are also buttons for 'Create Project' and 'SAVE'.

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

The screenshot shows the 'Project Settings' page. On the left, there is a table listing existing projects with columns for Project Name, Project Code, and Description. A search bar and filter options are at the top of the table. On the right, there is a form for creating a new project. It includes fields for 'Project Name *', 'Project Code *' (with a note that it cannot be modified after creation), 'Description', and a dropdown for 'Customer Details'. A 'Create Project' button and a 'SAVE' button are at the top right of the form area.

Project Name	Project Code	Description
demo sample	00001DS	test
Intan try	0001Intan	test
Sales project	code123	test
singyee_test	singyee_test	sing
Support	Support123	To s
test123	test123	test
testing_project	testing_project	test

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

The screenshot shows a software interface for managing virtual contacts within a project. At the top, there are navigation icons for 'Edit Project' (with a circular arrow icon), 'DELETE' (red button), and 'SAVE' (blue button). Below this, there are three tabs: 'Details', 'Virtual Contacts' (which is selected, indicated by a blue underline), and 'Agents'. On the left, there are two large circular icons: one with a grid symbol and another with a plus sign. A search bar with a magnifying glass icon and a 'Filter' dropdown are located below the tabs. The main area is a table with the following data:

Virtual Contact Name	Virtual Contact Code	Project
Customer Service	Customer Service	singyee_test
Service Inquiries	service	singyee_test

Below the table are three buttons: 'Columns', 'Filters', and a vertical scroll bar. The table has a header row with three columns: 'Virtual Contact Name', 'Virtual Contact Code', and 'Project'. The data rows show two entries, both associated with the project 'singyee_test'.

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	Columns	Filters
1918486514:AAFyYGgCxUduA1...	Service Inquiries	Telegram		

The screenshot shows two side-by-side pages from a software application.

Left Panel (Virtual Contact Details):

- Header:** Edit Virtual Contact, DELETE, SAVE.
- Section:** Details, Public Profile, Endpoints (selected).
- Search Bar:** Search, Filter.
- Data Table:**

Endpoint Id	Virtual Contact Name	Channel Name
1918486514:AAFyYGgCxUduA1...	Service Inquiries	Telegram
- Buttons:** Columns, Filters.

Right Panel (Create Endpoint):

- Header:** Create Endpoint, Add Endpoint.
- Section:** Details.
- Form Fields:**

Channel *	Endpoint Id *
Endpoint Name / UserName *	First Name
Last Name	Provider *
Access / Account ID	Auth Token
- Switch:** Append agent name to the m...

A.20.9.3. Teams

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

The screenshot shows the Team Settings page within the akaun application interface.

Left Sidebar:

- DASHBOARD
- MY PROFILE
- CONTACTS
- BROADCAST
- TASK QUEUE
- CONFIGURATIONS
- PROJECTS
- VIRTUAL CONTACTS
- TEAMS (highlighted)
- AGENTS
- PREDEFINED MESSAGES
- QR CODES
- TASKS
- AUTOMATION RULE
- RULE
- SETTINGS

Right Panel (Team Settings):

- Header:** Team Settings, Search, Filter, Rows (10), Page (1 of 1).
- Table:**

Team Name	Team Code	Description	Status	Create Date	Update Date
No Rows To Show					
- Buttons:** Columns, Filters.

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

The screenshot shows a user interface for creating a team. At the top left is a circular icon with a blue arrow pointing left. To its right is the text "CREATE TEAM". On the far right are two buttons: a blue "RESET" button and a grey "CREATE" button. Below these buttons is a horizontal navigation bar with three sections: "Detail" (highlighted with a blue underline), "Address", and "Agents" (indicated by a right-pointing arrow). The main area contains four input fields:

- Team Name:** An input field with a small "E" icon at the end.
- Team Code:** An empty input field.
- Website:** An empty input field.
- Description:** A text area with a character counter below it. The counter shows "0 characters" and has a small "X" icon next to it.

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).

The screenshot shows the akaun software interface. On the left, there is a sidebar with various menu items: DASHBOARD, MY PROFILE, CONTACTS, BROADCAST, TASK QUEUE (Task Queue), CONFIGURATIONS (Configurations), PROJECTS, VIRTUAL CONTACTS, TEAMS, AGENTS, PREDEFINED MESSAGES (selected), QR CODES, TASKS, AUTOMATION RULE, and SETTINGS. The main area is titled "Predefined Message Settings". It features a search bar, a filter button, and a table with columns: Message Name, Message Body, Message Status, Message Type, and Create Date. The table contains three rows of data:

Message Name	Message Body	Message Status	Message Type	Create Date
Welcome Message	Hi! Nice to meet you! Is there anything I can help you with?	ACTIVE	FIRST_AUTO_RESPONSE_MESSAGE	2021-08-02T10:01:33.356957Z
testing	hi thank you for reaching out to us. o...	ACTIVE	FIRST_AUTO_RESPONSE_MESSAGE	2021-05-06T02:53:51.706Z
Twilio WhatsApp	Dear {{1}}; Your issue {{2}} has been u...	ACTIVE	CHANNEL_APPROVED_TEMPLATE_M...	2021-06-30T10:08:33.29155Z

On the right side of the main area, there are buttons for "Rows" (set to 10), "Filter", "Columns", and "Filters".

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.



Create Predefined Message

SAVE

Name *

Message Type

Body *

Placeholders must follow this example format: {{1}}

Add Placeholder

Description

Message Status

A.20.9.6. QR Codes

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

The screenshot shows the akaun software interface. On the left, there is a vertical navigation bar with the following items:

- DASHBOARD
- MY PROFILE
- CONTACTS
- BROADCAST
- TASK QUEUE (Task Queue)
- CONFIGURATIONS (Configurations)
- PROJECTS
- VIRTUAL CONTACTS
- TEAMS
- AGENTS
- PREDEFINED MESSAGES
- QR CODES** (highlighted in pink)
- TASKS
- AUTOMATION RULE
- RULE
- SETTINGS

The main content area is titled "QR Codes Settings". It features a search bar with a placeholder "Search..." and a "Rows" dropdown set to 10. There are also icons for sorting, filtering, and columns. A table displays the following data:

QR Name ↑	QR Code	Virtual Contact Code	Team Code	Agent Code	Description
QR for Sales contact and keivan...	qr_Sales_contact_keivantest6	Complaints		keivantest6	QR Code For Sales Contact
QR for OneLiving and Kaiying	qr_OneLiving_Kaiying	OneLiving		Kaiying	QR Code For OneLiving and
amirul	amirul	Sales contact	ucc_team	Amirul	
Testing 123	Testing 123	Sales contact		TESTing_123	
QR for Complaints and KepXian	qr_Complaints_KepXian	Complaints		KepXian	QR Code For Complaints C
QR for Sales contact and LINA (...	qr_Sales_contact_LINA_ucc_team	Sales contact	ucc_team	LINA	QR Code For Sales Contac
QR for Sales contact and LINA (...	qr_Sales_contact_LINA_00001	Sales contact		LINA	QR Code For Sales Contac
Intan	AC0001	Sales contact		AC0001	Intan

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





CREATE QR CODE

RESET

CREATE

Virtual Contact Code

Team Code

Select Agent(s)

QR Code

QR Name

The QR Code cannot be modified after creation

Description

0 characters

A.20.9.7. Tasks

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

The screenshot shows the akaun software interface. On the left, there is a vertical sidebar with a purple header containing the 'akaun' logo and a user profile picture. Below the header, the sidebar has several sections: DASHBOARD, MY PROFILE, CONTACTS, BROADCAST, TASK QUEUE (selected), CONFIGURATIONS, PROJECTS, VIRTUAL CONTACTS, TEAMS, AGENTS, PREDEFINED MESSAGES, QR CODES, TASKS (selected), AUTOMATION RULE, RULE, and SETTINGS. The main area is titled 'Task Settings' and contains a table with four columns: Name, Code, and Target Type. There is also a search bar and pagination controls at the top of the table. The table data is as follows:

Name	Code	Target Type
Hello	24	singyee_test
Say muchimuchi	22	Development Staging
First	01	Staging
Saving	04	Enhancement

On the right side of the table, there are buttons for 'Columns' and 'Filters'.

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



CREATE TASK

RESET

CREATE

Task Code

Task Name

Priority Code

Task Target Type

Description

0 characters

A.20.9.8. Automation Rule

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

The screenshot shows the akaun software interface. On the left, there is a vertical sidebar with a dark blue header containing the 'akaun' logo. Below the header, the sidebar has several sections: DASHBOARD, MY PROFILE, CONTACTS, BROADCAST, TASK QUEUE (with a dropdown menu for Task Queue), CONFIGURATIONS (with a dropdown menu for Configurations), PROJECTS, VIRTUAL CONTACTS, TEAMS, AGENTS, PREDEFINED MESSAGES, QR CODES, TASKS, AUTOMATION RULE (which is highlighted in light blue), RULE, and SETTINGS. At the bottom of the sidebar is a pink footer bar.

The main content area is titled 'Automation Rule Settings'. It features a search bar with a magnifying glass icon and a text input field labeled 'Search...'. To the right of the search bar are buttons for sorting (asc/desc) and filtering (grid). A table displays automation rules with columns for Name, Code, Created Date, and Updated Date. The table shows two entries: 'Hello World' (Code 01, Created: 2021-08-06T09:22:23.846Z, Updated: 2021-08-06T09:22:23.846Z) and 'Third' (Code 02, Created: 2021-08-06T08:44:10.894Z, Updated: 2021-08-06T09:22:11.795Z). The table includes buttons for 'Rows' (set to 10), 'Columns', and 'Filters'.

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



CREATE AUTOMATION RULE

RESET

CREATE

Automation Rule Code

Automation Rule Name

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

The screenshot shows the 'Applet Settings' page for the 'UCC APPLET'. The left sidebar contains links like 'STAGING_TENANT', 'INBOX', 'DASHBOARD', 'MY PROFILE', 'CONTACTS', 'BROADCAST', 'TASK QUEUE', 'CONFIGURATIONS', 'SETTINGS', and 'PERSONALIZATION'. The main content area has a 'SYSTEM CONFIGURATION' tab with 'Field Settings' selected. Other tabs include 'Default Selection', 'CLIENT SIDE PERMISSIONS' (with 'Applet Access' selected), 'SERVER SIDE PERMISSIONS' (with 'Permission Set' selected), 'INTEGRATION' (with 'Triggers' selected), and 'DEVELOPER TOOLS' (with 'Applet Log' selected). A 'SAVE' button is located in the top right corner.

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.

Applet Settings

The screenshot shows the 'Applet Settings' page with the 'Field Settings' tab selected under 'SYSTEM CONFIGURATION'. The main content area has a 'LINES SETTINGS' section containing four toggle switches: 'Unit Discount', 'SST/VAT/GST', 'WHT', and 'Blanket Order'. Below this is a 'DEPARTMENT SETTINGS' section, which is currently collapsed. A 'SAVE' button is located in the top right corner.

Department Settings

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

Applet Settings

The screenshot shows the 'Applet Settings' interface. On the left, a sidebar lists various configuration sections: SYSTEM CONFIGURATION (Field Settings, Default Selection), CLIENT SIDE PERMISSIONS (Applet Access), SERVER SIDE PERMISSIONS (Permission Set, User Permission, Team Permission, Role Permission), INTEGRATION (Triggers), and DEVELOPER TOOLS (Applet Log, Reset Applet State). The 'Field Settings' section is currently selected and highlighted in grey. On the right, the main content area is titled 'LINES SETTINGS' and contains a 'DEPARTMENT SETTINGS' section. This section includes four items: Segment (selected, indicated by a checked radio button), 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.

Applet Settings

The screenshot shows the 'Applet Settings' interface. The sidebar is identical to the previous screenshot. The 'Default Selection' section is now selected and highlighted in grey. The main content area is titled 'APPLER DEFAULT SETTINGS' and contains two dropdown menus: 'Default Branch:' (set to 'Branch') and 'Default Location:' (set to 'Location'). A blue 'SAVE' button is located in the top right corner of the main content area.

A.20.10.2. Client Side Permissions

Applet Access

A user can manage their team access under this menu.

Applet Settings

- SYSTEM CONFIGURATION
 - [Field Settings](#)
 - [Default Selection](#)
- CLIENT SIDE PERMISSIONS
 - [Applet Access](#)
- SERVER SIDE PERMISSIONS
 - [Permission Set](#)
 - [User Permission](#)
 - [Team Permission](#)
 - [Role Permission](#)
- INTEGRATION
 - [Triggers](#)
- DEVELOPER TOOLS
 - [Applet Log](#)
 - [Reset Applet State](#)

The screenshot shows a 'Manage Team Access' interface. On the left, there's a sidebar with navigation links. In the center, a list titled 'TEAMS' displays 'Team 1', 'Team 2', and 'Team 3'. A blue circular button with a white plus sign is positioned in the top right corner of the main content area. A blue 'SAVE' button is located in the top right corner of the entire interface.

A.20.10.3. Server Side Permissions

Permission Set

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

Applet Settings

- SYSTEM CONFIGURATION
 - [Field Settings](#)
 - [Default Selection](#)
- CLIENT SIDE PERMISSIONS
 - [Applet Access](#)
- SERVER SIDE PERMISSIONS
 - [Permission Set](#)
 - [User Permission](#)
 - [Team Permission](#)
 - [Role Permission](#)
- INTEGRATION
 - [Triggers](#)
- DEVELOPER TOOLS
 - [Applet Log](#)
 - [Reset Applet State](#)

The screenshot shows a 'Permission Set' management interface. On the left, there's a sidebar with navigation links. In the center, a table lists permission sets with columns: 'Code', 'Name', 'Created Date', and 'Modified Date'. A blue circular button with a white plus sign is located in the top left corner of the table header. The table includes standard data manipulation controls like a search bar, sort icons, and a page navigation bar at the bottom.

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



Add Permission Set

SAVE

Perm Set Name *

Perm Set Code *

Code must be unique

Perm Template *

Configure Permission Targets *



Description

Status *

User Permission

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

SYSTEM CONFIGURATION

[Field Settings](#)[Default Selection](#)

CLIENT SIDE PERMISSIONS

[Applet Access](#)

SERVER SIDE PERMISSIONS

[Permission Set](#)**User Permission**[Team Permission](#)[Role Permission](#)

INTEGRATION

[Triggers](#)

DEVELOPER TOOLS

[Applet Log](#)[Reset Applet State](#)

Email	Mobile	Rank
norsabrina@wavelet.net	+60193268681	
wansyazwina@senwave.com.my		
mohammad@wavelet.net		
jayed@wavelet.net	+60178774760	
sara@wavelet.net	+60176082142	
yaser@wavelet.net		
CPR84H3YZJ		
lana@wavelet.net		
sundar.smartrental@gmail.com		ADMIN
ekmalhairi@wavelet.net	+601123085272	

Team Permission

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

SYSTEM CONFIGURATION

[Field Settings](#)[Default Selection](#)

CLIENT SIDE PERMISSIONS

[Applet Access](#)

SERVER SIDE PERMISSIONS

[Permission Set](#)[User Permission](#)**Team Permission**[Role Permission](#)

INTEGRATION

[Triggers](#)

DEVELOPER TOOLS

[Applet Log](#)[Reset Applet State](#)

Team Name	Team Code	No. of Members
Celmonze	cmztest	1
Smart Rental	smartrental	9
Unipin Team	unipinteam	26
UNIPIN-TEAM	unipinx	23
teamTest	teamtest	139
directDCCSSpeed	ddcsspeed	1
testTeam	testteam	1
testTeam	testteam	1
Azri Team	azriteam	29
Senheng Finance Team	senhengfinanceteam	1

Role Permission

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

SYSTEM CONFIGURATION

[Field Settings](#)[Default Selection](#)

CLIENT SIDE PERMISSIONS

[Applet Access](#)

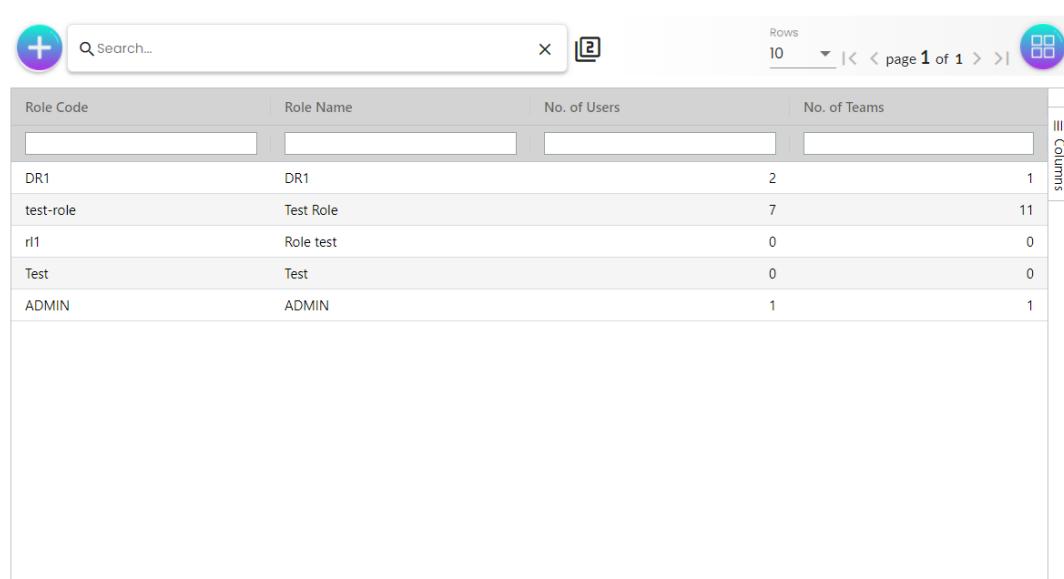
SERVER SIDE PERMISSIONS

[Permission Set](#)[User Permission](#)[Team Permission](#)[Role Permission](#)

INTEGRATION

[Triggers](#)

DEVELOPER TOOLS

[Applet Log](#)[Reset Applet State](#)


The screenshot shows a table titled "Role Management" with the following data:

Role Code	Role Name	No. of Users	No. of Teams
DR1	DR1	2	1
test-role	Test Role	7	11
r11	Role test	0	0
Test	Test	0	0
ADMIN	ADMIN	1	1

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



Add Role

SAVE

Name *

Code *

Code must be unique

Status



A.20.10.4. Integration

Triggers

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

Applet Settings

The screenshot shows the 'APPLET TRIGGERS' section of the Applet Settings. On the left, there's a sidebar with sections: SYSTEM CONFIGURATION (Field Settings, Default Selection), CLIENT SIDE PERMISSIONS (Applet Access), SERVER SIDE PERMISSIONS (Permission Set, User Permission, Team Permission, Role Permission), INTEGRATION (Triggers), and DEVELOPER TOOLS (Applet Log, Reset Applet State). The 'Triggers' section is currently selected. The main area displays a table titled 'APPLET TRIGGERS' with columns: Name, Event Queue, Parameters, and Status. It contains three rows: 'Trigger #1' (Status: ACTIVE), 'Trigger #2' (Status: ACTIVE), and 'Trigger #3' (Status: ACTIVE). Below the table is a 'CREATE NEW TRIGGER' section with a 'Trigger Name' input field and a dropdown for 'Status' set to 'ACTIVE'. A 'Param Name' table below it has one row: 'No Rows To Show'.

User can also create new triggers to the list.

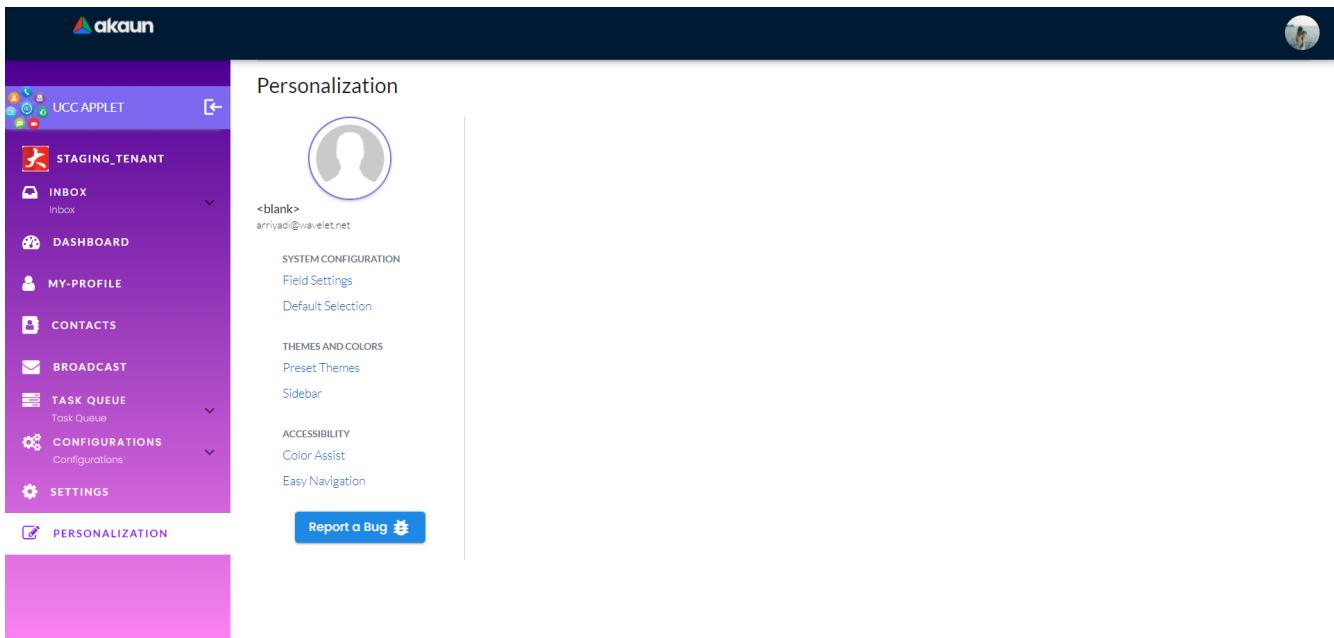
Applet Settings

The screenshot shows the 'CREATE NEW TRIGGER' form within the Applet Settings. The sidebar on the left is identical to the previous screenshot. The main area has a 'Trigger Name' input field containing 'Trigger Name'. A dropdown for 'Status' is set to 'ACTIVE'. Below is a table for parameters with a header 'Param Name' and 'Param Value'. A '+' button is available to add more rows. At the bottom, there's a 'CREATE' button. A horizontal line separates this from the 'EVENT QUEUE' section, which contains a grid of checkboxes for events: Sample Event #1 through #10, and Sample Event #3 through #9.

A.20.10.5. Developer Tools

NOTE The functionalities are still under development.

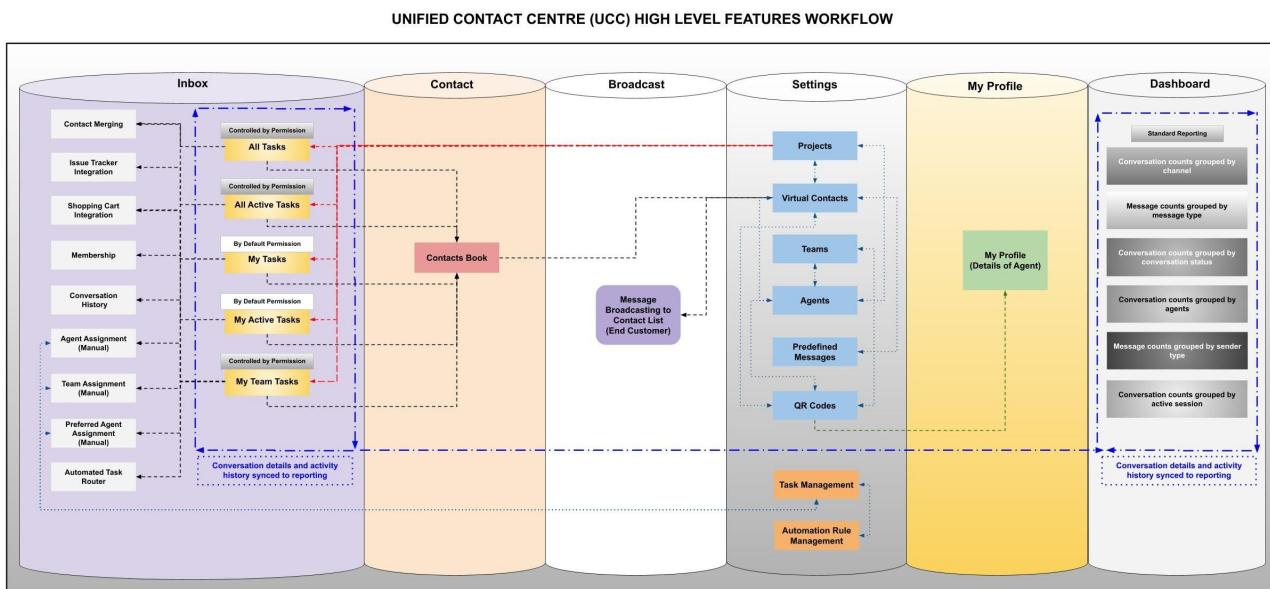
A.20.11. Menu 09 - Personalization



NOTE The functionalities are still under development.

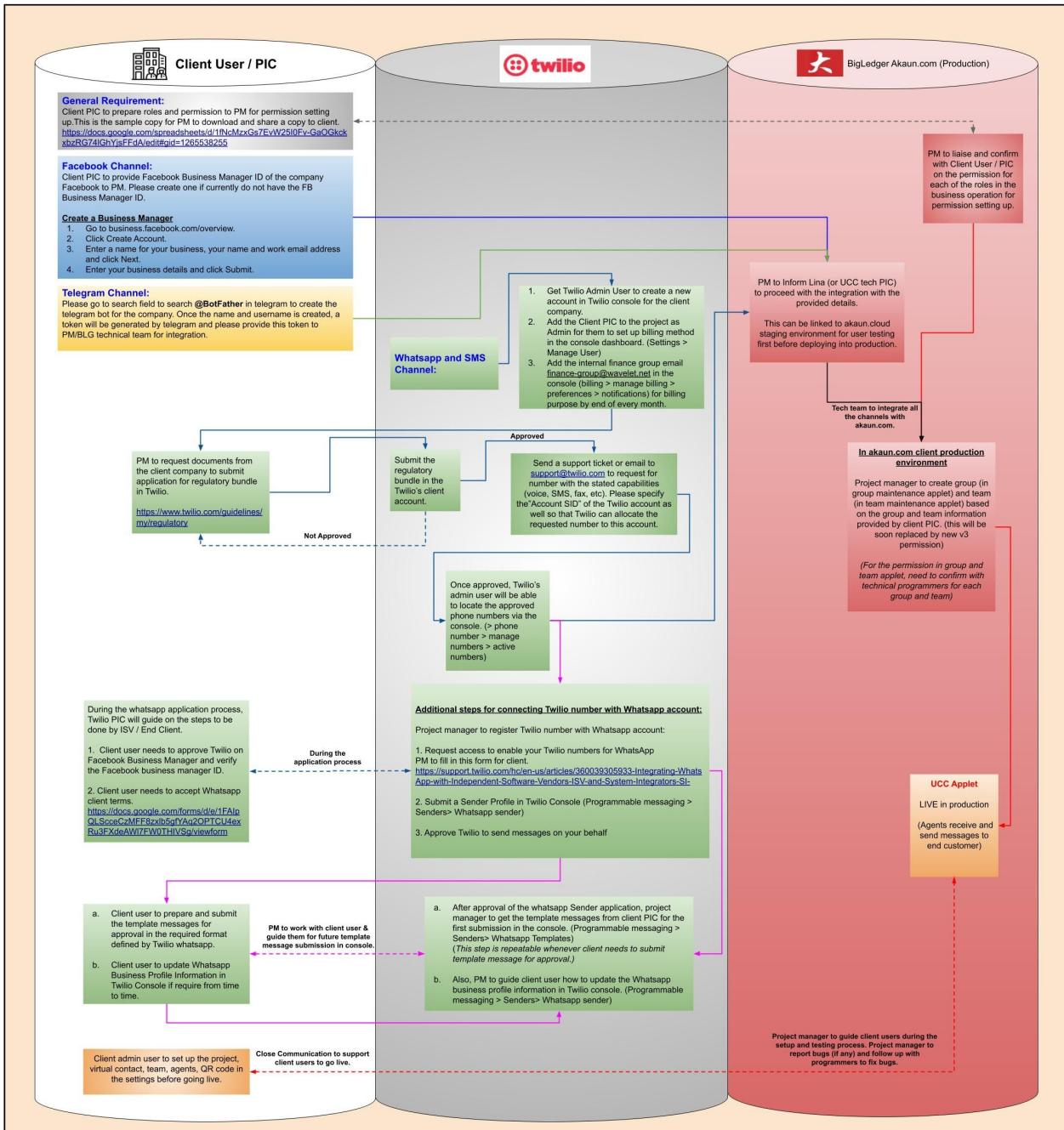
A.20.12. Implementation

A.20.12.1. High Level Features Workflow



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.



BotFather ✅

bot



BotFather is the one bot to rule them all. Use it to create new bot accounts and manage your existing bots.

[Description](#)

@BotFather

Username

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



18

BotFather

bot



What can this bot do?

BotFather is the one bot to rule them all. Use it to create new bot accounts and manage your existing bots.

About Telegram bots:

<https://core.telegram.org/bots>

Bot API manual:

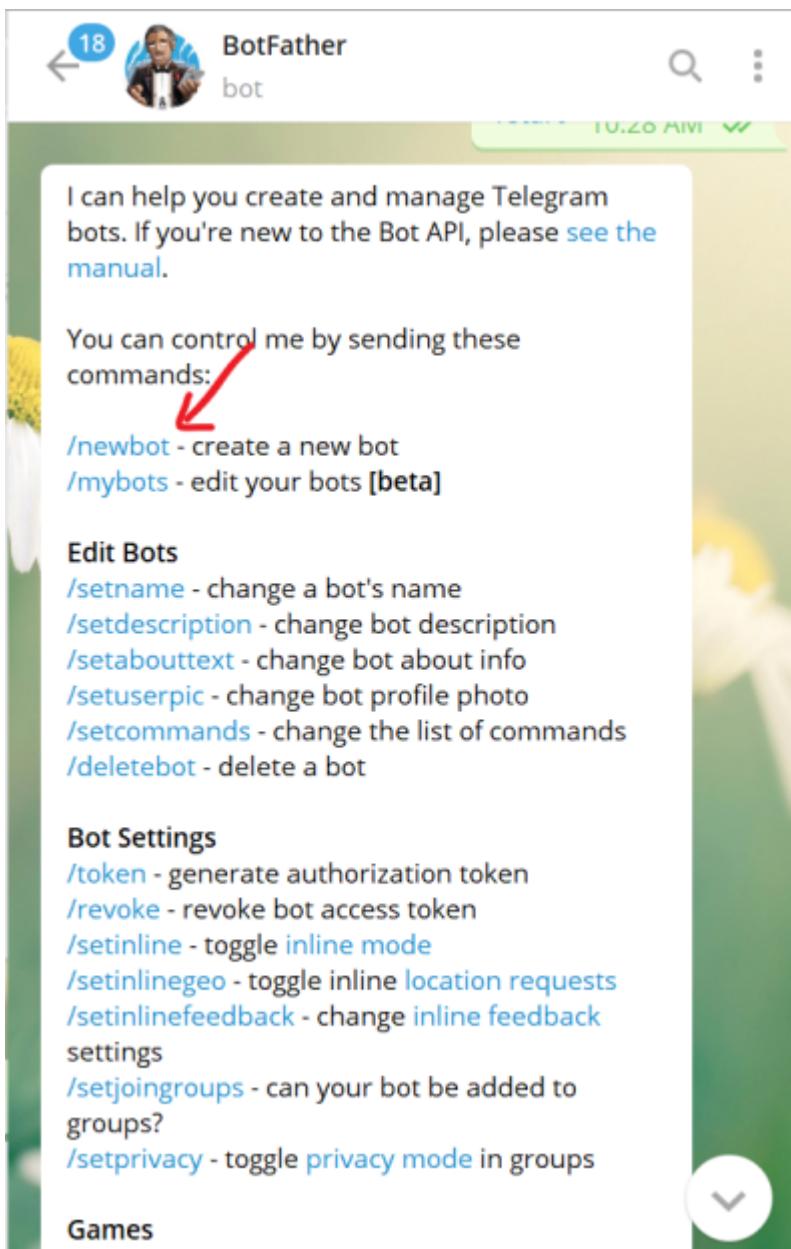
<https://core.telegram.org/bots/api>

Contact [@BotSupport](#) if you have questions about the Bot API.

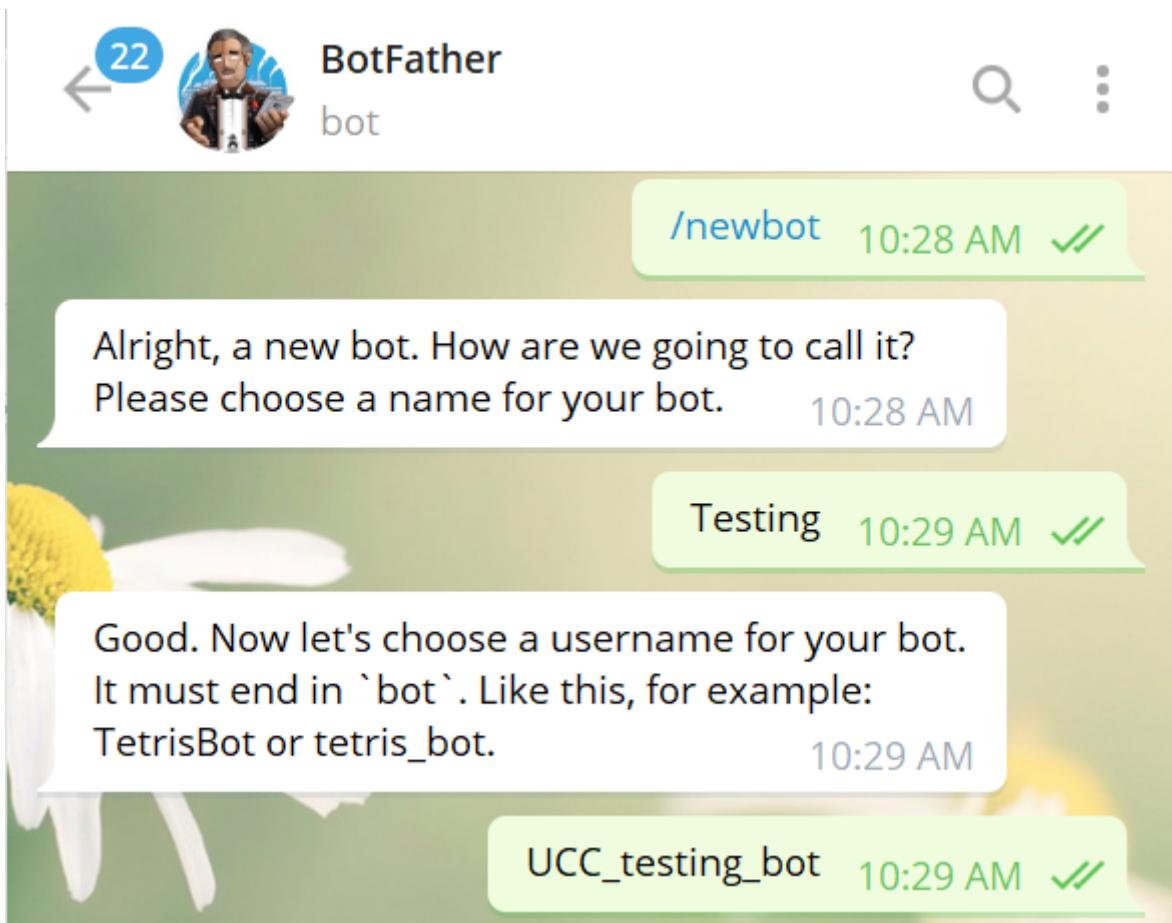
May 28

/start 10:28 AM ✓

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.

Done! Congratulations on your new bot. You will find it at t.me/UCC_testing_bot. 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:



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> 10:29 AM

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>

The screenshot shows the Twilio Admin Center interface. On the left, there's a sidebar with 'Admin Center' and 'Overview' selected. Under 'Accounts', 'Users', 'Domains', and 'Settings' are listed. The main area shows a list of 'Managed Accounts' with columns for 'Name', 'Status', 'Date Created', and 'Actions'. A modal window titled 'Create New Account' is open in the center. It contains fields for 'Name' (with a placeholder 'Ex: New Twilio Account') and 'Create' (with a red arrow pointing to it). There's also a checkbox for 'This is a Flex account.' and buttons for 'Cancel' and 'Create'.

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.

The screenshot shows the Twilio Admin Center interface for a specific account named 'Thunder Match'. The 'General' tab is selected. The 'Account Name' is set to 'Thunder Match'. The 'Account Owner' field is populated with 'vincent@akaun.com' (highlighted with a red arrow). Other account details shown include 'Account SID' (AC75ca21eb64b0b7bf7d3ef09fd02e9c7d), 'Date Created' (Oct 26, 2021), 'Status' (Active), and 'Account Type' (Standard Account). At the bottom, there's a section for 'Two-Factor Authentication' with options for 'Disabled: Do not require a verification code' (selected) and 'Once per computer: Trust computers and only ask for a verification code every 30 days'. Buttons for 'Save' (highlighted with a red arrow), 'Cancel', and 'Close Account' are at the bottom.

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

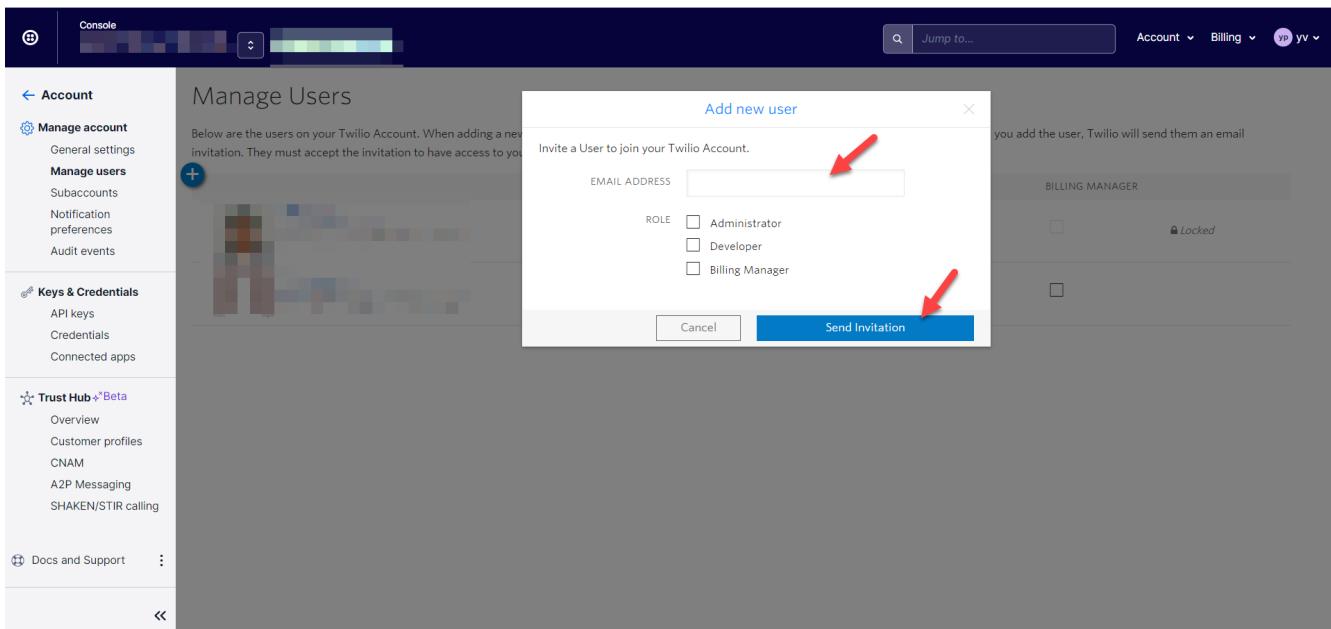
2.1 Project manager to provide the client user an admin access to access into the console for billing matters and WhatsApp related services.

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.

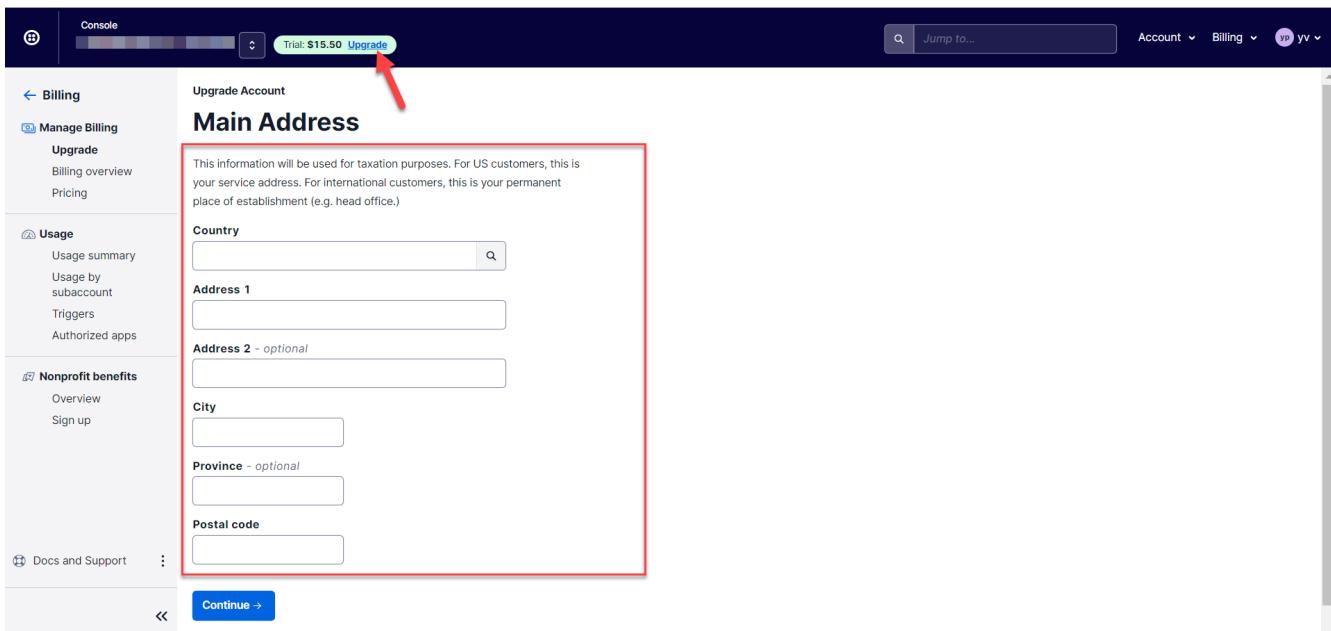
And also, kindly add Lina@wavelet.net as administrator as well for the Whatsapp configuration in all the Twilio console client account.

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.

Billing

Manage Billing

- Upgrade
- Billing overview
- Pricing

Usage

- Usage summary
- Usage by subaccount
- Triggers
- Authorized apps

Nonprofit benefits

- Overview
- Sign up

Docs and Support

Tax information

Based on your jurisdiction, Twilio may need to collect tax on the services sold, in order to abide by local laws. Please provide your tax number so that we can apply this correctly to your invoice. [Learn More](#)

Can you provide a business tax number?

Yes, I can provide a tax number

No, I cannot provide a tax number

Main address

No. 24B, 2nd Floor Jalan USJ 10/1B,
Subang Jaya
Selangor 47620
MY
[Edit](#)

Continue → **Back**

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.

Console

Dashboard

Hi there! Want to get an app running with no code?
Check out our most popular use cases [See app samples](#)

Project Info

BALANCE \$15.00 [Auto-recharge is disabled. Enable](#)

REFERRAL PROGRAM Refer your network to Twilio — give \$10, get \$10. [Referral Dashboard](#)

ACCOUNT SID	AC [REDACTED]	YOUR ROLE	Admin
AUTH TOKEN	Show	PROJECT NAME	Siang Pharmacy Sdn Bhd
		PROGRAMMING LANG	Python
		MANAGED BY	wavelet

Manage Billing

- Billing overview
- Payment history
- Recurring items
- Payment methods
- Pricing
- Preferences**

Usage

- Usage summary
- Usage by subaccount
- Triggers
- Authorized apps

Nonprofit benefits

- Overview
- Sign up

Docs and Support

Step 1 - Learn About SMS

With just a few lines of code, your Python application can send and receive text messages. You'll use the Twilio REST API and the Twilio Python helper library

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.

The screenshot shows the Twilio Billing Preferences page under the 'Notifications' tab. A red box highlights the 'PRIMARY BILLING EMAIL ADDRESS' field containing 'finance-group@wavelet.net'. Another red box highlights the 'Preferences' link in the sidebar. Three red arrows point from the text 'The documents you select will be sent out to the email addresses specified on a monthly basis. If no email addresses are specified, they will be emailed to users with owner, admin, and billing roles.' to three checked checkboxes: 'Invoice PDF', 'Invoice CSV supplement', and 'Payment receipts'. At the bottom, a red arrow points to the 'Save' button.

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 <i>One of the following</i>
Business Name	Proof of Identity	<ul style="list-style-type: none"> Business registration
Business Address <i>Must be within Malaysia</i>	Proof of Malaysian Address	<ul style="list-style-type: none"> Business registration showing Malaysian address
Name of Authorized Representative	Proof of Identity	<ul style="list-style-type: none"> Government-issued ID with picture Passport
Identity Document Number of Authorized Representative	Proof of Identity Document Number	<ul style="list-style-type: none"> Government-issued ID Passport
Identity Document Issuing Country of Authorized Representative	Proof of Identity Document Issuing Country	<ul style="list-style-type: none"> Government-issued ID Passport
Address of Authorized Representative <i>Must be within Malaysia</i>	Proof of Malaysian Address	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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.

The screenshot shows the Twilio Console General Settings page. On the left sidebar, under 'Manage account', 'General settings' is selected and highlighted with a red box. The main content area shows the 'General Settings' page with a 'Properties' section containing a 'PROJECT NAME' input field, which has a red arrow pointing to it. Below it is an 'ACCOUNT SID' field showing 'AC4bb7e4ce54e2f261a154b231ace6ea5'. There's also a 'Require Two-Factor Authentication (2FA)' section with three options: 'ONCE PER COMPUTER', 'EVERY LOG-IN', and 'DISABLED' (which is selected). The 'API Credentials' section shows 'LIVE Credentials' and 'TEST Credentials' tables. The 'LIVE Credentials' table has an 'ACCOUNT SID' field showing 'AC4bb7e4ce54e2f261a154b231ace6ea5' and a note 'Used to exercise the REST API'. The 'TEST Credentials' table has an 'ACCOUNT SID' field showing 'AC4bb7e4ce54e2f261a154b231ace6ea5' and a note 'Used to exercise the REST API'.

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

The screenshot shows the Twilio Console Explore Products page. On the left sidebar, 'Explore Products' is selected and highlighted with a red box. The main content area shows the 'All Products' section with various categories: 'Proxy' (Beta), 'Autopilot', 'Super Network', 'Interconnect', 'Elastic SIP Trunking', 'Internet of Things', and 'Solutions'. Under the 'Super Network' category, there is a link '# Phone Numbers' with a red arrow pointing to it. Below it is a description: 'Choose from local or global numbers, Short Codes, Alphanumeric Sender IDs, etc.' and a 'Docs' link.

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

Regulatory Bundles

Due to country specific regulations, you'll need to create a Regulatory Bundle for each type of phone number, so you can provision and use phone numbers legally.

- For example, if you need to provision and use German Toll-Free phone numbers, you'll need to create and submit a Regulatory Bundle for this type of phone number.
- For each Regulatory Bundle, you will have to upload Supporting Documents.
- Once you submit a Regulatory Bundle, it will take up to 3 business days for us to verify if the information meets Regulatory Requirements.

[Click here to learn more about Regulatory Requirements](#)

Create a Regulatory Bundle →

Status Country Friendly Name Filter

Hmm, nothing matched your search.

Check your spelling or try something more general.

Clear filters

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

Bundles / Create a Regulatory Bundle

1. Choose Country & Type of phone number that needs to be compliant

PHONE NUMBER'S COUNTRY: Malaysia

TYPE OF PHONE NUMBER: Mobile

Next

2. Select the End-User who will use Malaysia Mobile phone numbers

3. Add business information

4. Upload Supporting Documents

5. Give this Regulatory Bundle a Friendly Name (Optional)

Submit for review **Cancel**

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

Create a Regulatory Bundle

1. Choose Country & Type of phone number that needs to be compliant
2. Select the End-User who will use Malaysia Mobile phone numbers
3. Add business information
4. Upload Supporting Documents
5. Give this Regulatory Bundle a Friendly Name (Optional)
6. Set-up Notifications (Optional)

Business: A business will make or receive calls with the phone number.
 Business
 Individual: An individual will make or receive calls with the phone number.

Next

Next, please select “Business” if this is business application.

Business information

PROVIDE INFORMATION FOR A NEW BUSINESS, OR SELECT FROM AN EXISTING RECORD
 Enter new business information Select existing business information

Enter new business information

FRIENDLY NAME *	BUSINESS NAME *
<input type="text"/>	<input type="text"/>
FIRST NAME *	LAST NAME *
<input type="text"/>	<input type="text"/>

Save **Cancel**

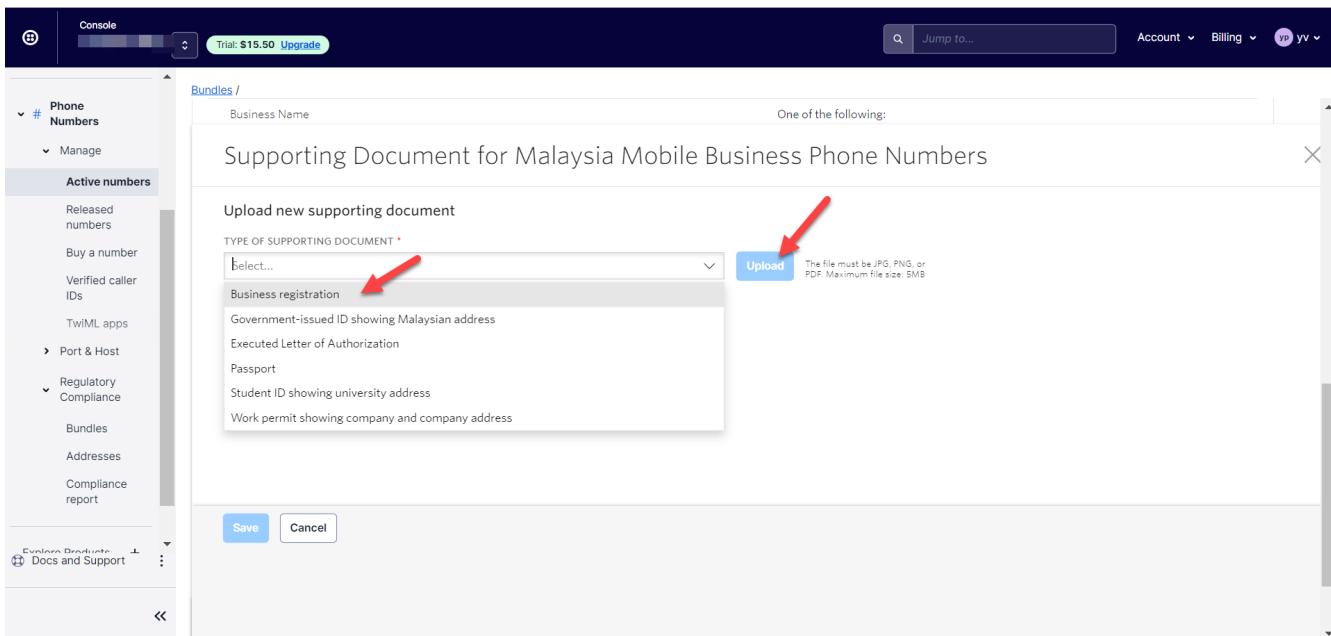
Next, please enter the business information. Friendly name and Business Name can be the same. Business Name has to be the official business name in the business registration form. First Name and Last Name is the name of the business owner / business representative for this Twilio application. Kindly 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.

The screenshot shows the Twilio Console interface for adding a regulatory bundle. On the left, there's a sidebar with options like 'Phone Numbers', 'Active numbers', 'Bundles', etc. The main area has sections for '2. Select the End-User who will use Malaysia Mobile phone numbers' and '3. Add business information'. In section 3, there's a form with fields for 'END-USER SID' (containing 'Sdn Bhd'), 'BUSINESS NAME' (redacted), 'FIRST NAME' (redacted), and 'LAST NAME' (redacted). A large red arrow points to the 'Next' button at the bottom of this section. Below it are sections for '4. Upload Supporting Documents' and '5. Give this Regulatory Bundle a Friendly Name (Optional)'. At the bottom, there are 'Submit for review' and 'Cancel' buttons, and a message 'Draft saved'.

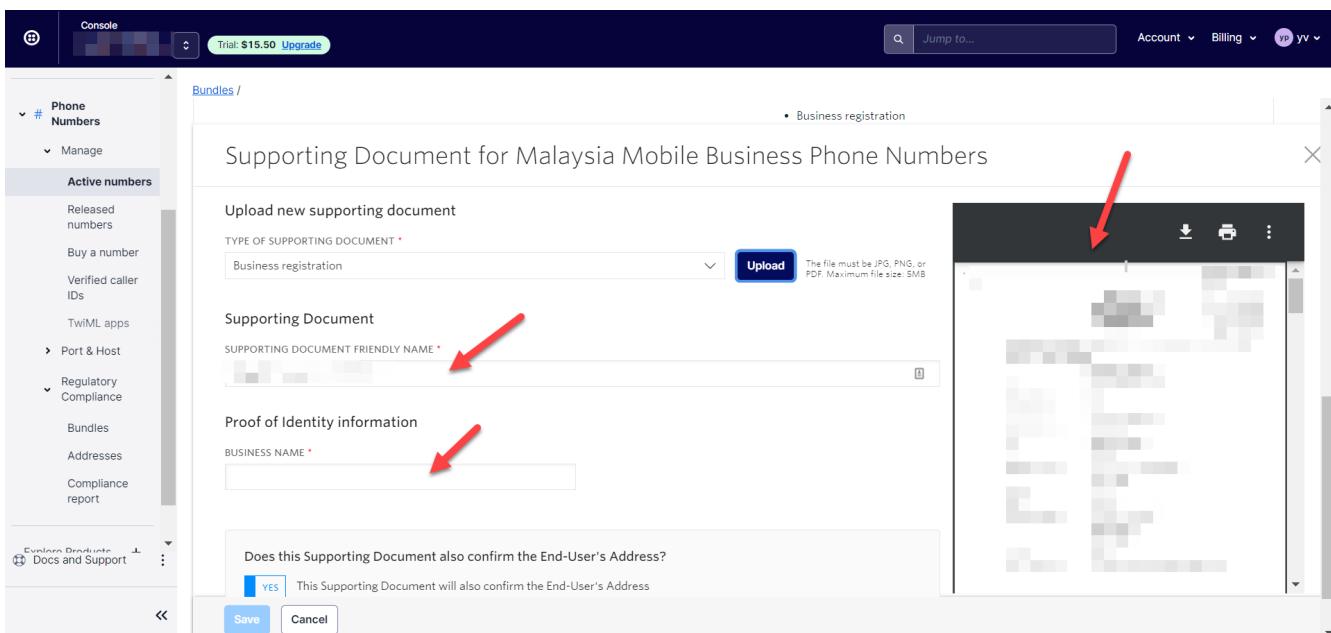
After the business information is added, please click “Next” to proceed.

This screenshot continues from the previous one, showing the 'Add supporting documents' step. It includes fields for 'Business Name', 'Identity Document Number of Authorized Representative', and 'Business Address (Proof of Address)'. Below these is a box containing the text: 'To comply with local regulations, we need to provide supporting documentation to carriers or local enforcement agencies. Supporting documents are used to verify the end-user's information.' A red arrow points to the 'Add supporting document' button. The bottom of the screen shows sections for '5. Give this Regulatory Bundle a Friendly Name (Optional)', 'Submit for review', 'Cancel', and a 'Draft saved' message.

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.

Supporting Document for Malaysia Mobile Business Phone Numbers

This Supporting Document will also confirm the End-User's Address

Proof of Address information

ADDRESS FRIENDLY NAME *

CUSTOMER NAME

ADDRESS 1 *

ADDRESS 2 Additional street address, PO box, suit, unit, etc.

CITY * STATE/PROVINCE/REGION * COUNTRY * POSTAL CODE *

Save **Cancel**

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

Bundles /

Business Address (Proof of Address) You provided a(n) Business registration showing Malaysian address

SUPPORTING DOCUMENT DOCUMENT TYPE STATUS

Business registration Draft

Next

5. Give this Regulatory Bundle a Friendly Name (Optional)

6. Set-up Notifications (Optional)

Submit for review **Cancel** **Draft saved**

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

The screenshot shows the Twilio Console interface. On the left, there's a sidebar with navigation links like 'Phone Numbers', 'Manage', 'Active numbers', 'Released numbers', 'Buy a number', 'Verified caller IDs', 'TwiML apps', 'Port & Host', 'Regulatory Compliance', 'Bundles', 'Addresses', and 'Compliance report'. The main area is titled 'Supporting Document for Malaysia Mobile Business Phone Numbers'. It has a dropdown menu 'TYPE OF SUPPORTING DOCUMENT' set to 'Government-issued ID showing Malaysian address'. Below it is a blue 'Upload' button with a red arrow pointing to it. A note says 'The file must be JPG, PNG, or PDF. Maximum file size: 5MB'. At the bottom are 'Save' and 'Cancel' buttons.

Please upload the Malaysian identity card document.

This screenshot shows the same Twilio Console interface as the previous one, but with a red box highlighting the 'Supporting Document' section. Inside this box, there's a file input field containing 'IC.pdf'. Below it is the 'Proof of Identity information' section, which includes fields for 'FIRST NAME', 'LAST NAME', 'ISSUING COUNTRY' (set to 'Malaysia'), and 'DOCUMENT NUMBER'. A note asks 'Does this Supporting Document also confirm the End-User's Address?' with a 'YES' button. To the right of the form, there are two blurred images of identity cards. At the bottom are 'Save' and 'Cancel' buttons.

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

Supporting Document for Malaysia Mobile Business Phone Numbers

YES This Supporting Document will also confirm the End-User's Address

Proof of Address information

ADDRESS FRIENDLY NAME *

Home Address

CUSTOMER NAME

Name for the business or customer

ADDRESS 1 *

ADDRESS 2 Additional street address, PO box, suit, unit, etc.

CITY * STATE/PROVINCE/REGION * COUNTRY * POSTAL CODE *

Malaysia

Save Cancel

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

Bundles /

You provided a(n) Business registration showing Malaysian address

Business Address (Proof of Address)

SUPPORTING DOCUMENT	DOCUMENT TYPE	STATUS
[Redacted]	Government-issued ID showing Malaysian address	Draft
[Redacted]	Business registration	Draft

Next

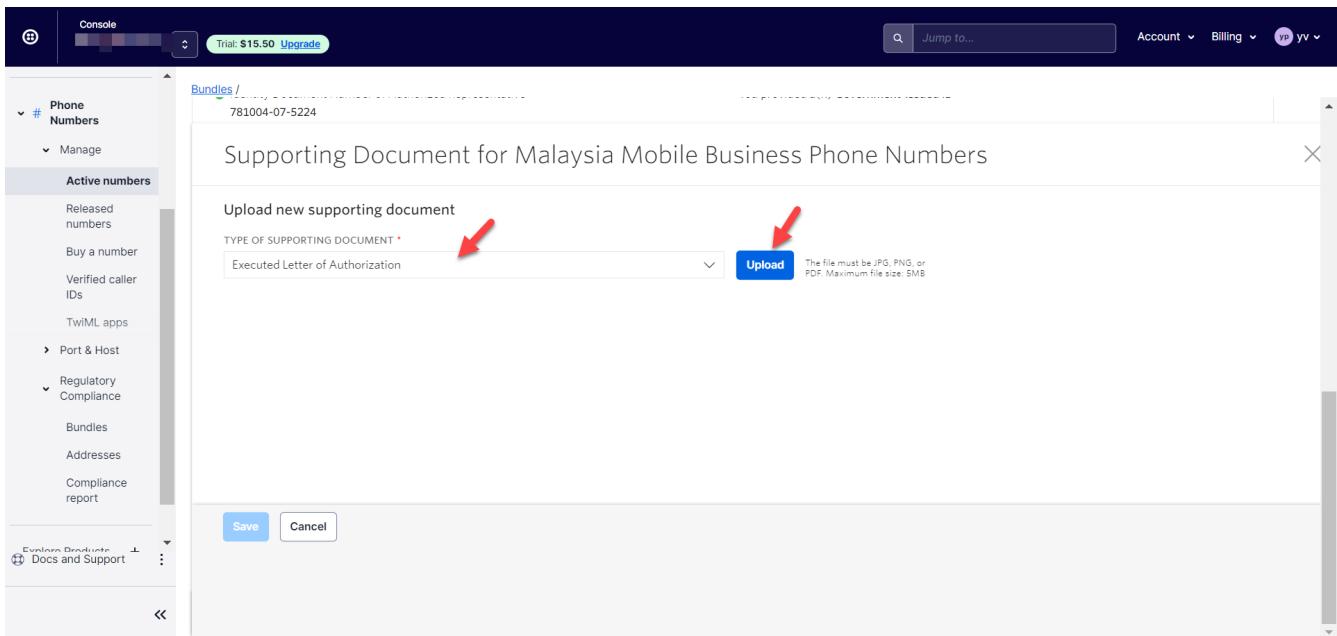
5. Give this Regulatory Bundle a Friendly Name (Optional)

6. Set-up Notifications (Optional)

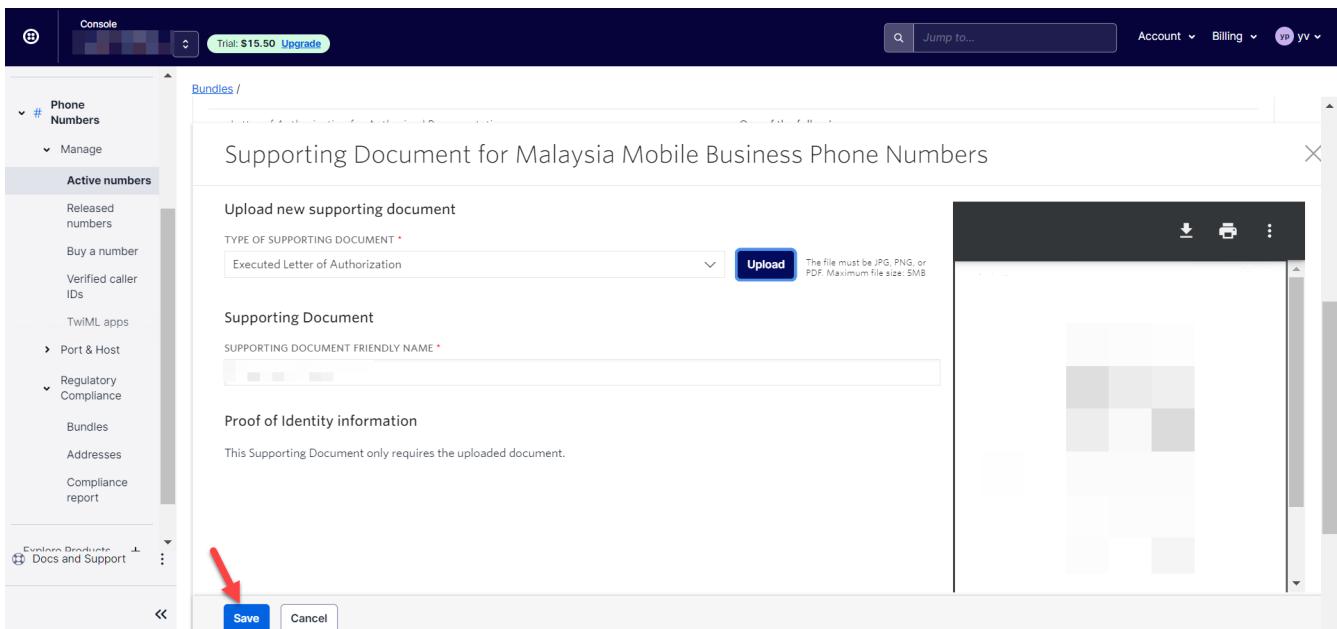
Submit for review Cancel

Draft saved

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.**



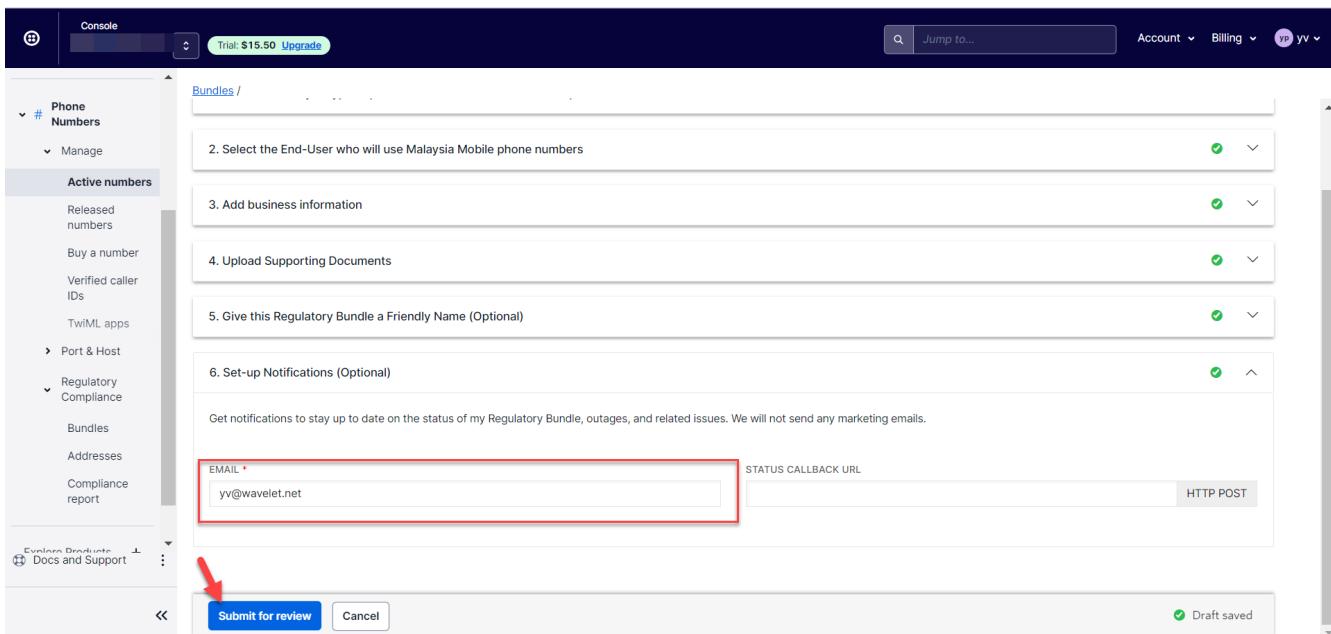
Please click "Save" to proceed.

Screenshot of the Twilio Console showing the 'Bundles' step. The left sidebar shows 'Phone Numbers' and 'Active numbers'. The main area displays a business address: '11 Lorong Jawi Jaya 3, Taman Jawi Jaya Sungai Bakap Pulau Pinang Pulau Pinang, Pulau Pinang, Malaysia, 14200 AD96b175b4ee646fed1a8b9449678d566a'. Below this, there's a table for 'SUPPORTING DOCUMENT' with three rows: 'Executed Letter of Authorization' (Draft), 'Government-issued ID showing Malaysian address' (Draft), and 'Business registration' (Draft). A red arrow points to the 'Next' button at the bottom of the page. The status bar at the bottom right says 'Draft saved'.

Next, please click “Next” to proceed.

Screenshot of the Twilio Console showing the 'REGULATORY BUNDLE FRIENDLY NAME' step. The left sidebar shows 'Phone Numbers' and 'Active numbers'. The main area lists steps: 2. Select the End-User who will use Malaysia Mobile phone numbers, 3. Add business information, 4. Upload Supporting Documents, 5. Give this Regulatory Bundle a Friendly Name (Optional), and 6. Set-up Notifications (Optional). Step 5 has a note: 'Use a unique nickname you will easily recognize. You will need to assign this Regulatory Bundle to a phone number to be compliant with regulatory requirements. We've provided a default name you can change.' A red arrow points to the 'REGULATORY BUNDLE FRIENDLY NAME' input field. A second red arrow points to the 'Next' button at the bottom. The status bar at the bottom right says 'Draft saved'.

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: ACxxxxxxxxxxxxxxxxxxxxxx Address
SID: ASxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx Bundle SID:
BUxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx

Thank you.

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

Hi there! Want to get an app running with no code?
Check out our most popular use cases

See app samples ↗

Project Info

BALANCE
\$469.70 Auto-recharge is disabled. Enable

REFERRAL PROGRAM
Refer your network to Twilio — give \$10, get \$10. [Referral Dashboard](#)

ACCOUNT SID **AC123456789012345678901234567890**

AUTH TOKEN [Show](#)

YOUR ROLE Admin
PROJECT NAME One Living (Main) [Edit](#)
PROJECT USERS 4 manage
PROGRAMMING LANGUAGE Java

Step 1 - Learn About SMS

With just a few lines of code, your Java application can send and receive text messages. You'll use the Twilio REST API and the Twilio Java helper library

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

Console One Living (Main)

Develop Monitor

Phone Numbers [Manage](#)

Port & Host [Manage](#)

Regulatory Compliance [Manage](#)

Bundles [Manage](#)

Addresses [Create an Address](#)

Compliance report

Messaging Voice

Explore Products +

Docs and Support

Friends

Step 1 - Learn About SMS

With just a few lines of code, your Java application can send and receive text messages. You'll use the Twilio REST API and the Twilio Java helper library

Friendly Name	Country	Address	Validated	Emergency Validated
SDN BHD	US	123 Main St, Suite 100, San Francisco, CA 94103	No	No
AD	US	123 Main St, Suite 100, San Francisco, CA 94103	No	No

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

Regulatory Bundles

Due to country specific regulations, you'll need to create a Regulatory Bundle for each type of phone number, so you can provision and use phone numbers legally.

- For example, if you need to provision and use German Toll-Free phone numbers, you'll need to create and submit a Regulatory Bundle for this type of phone number.
- For each Regulatory Bundle, you will have to upload Supporting Documents.
- Once you submit a Regulatory Bundle, it will take up to 3 business days for us to verify if the information meets Regulatory Requirements.

[Click here to learn more about Regulatory Requirements](#)

[Create a Regulatory Bundle](#)

Status	Country	Filter		
Friendly Name				
REGULATORY BUNDLE & SID	COUNTRY	TYPE	END-USER	STATUS
QNE_LIVING SDN BHD BU	Malaysia	Mobile	Business	Twilio Approved

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>

Active Numbers

Number	Friendly Name	Capabilities	Active Configuration
██████████‡	██████████	Voice SMS MMS Fax	Messaging Unconfigured

Legend:

- * Can send/receive calls to domestic numbers only
- † Can send/receive sms to domestic numbers only
- ‡ This number does NOT support SIP Trunking
- ▲ Can make emergency calls.
- (national) A non-geographic number
- (beta) This number is new to the Twilio Platform
- (hosted) This number is hosted on the Twilio Platform

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.

WhatsApp enabled senders

You need to request access to WhatsApp

If you would like to use your Twilio number with WhatsApp, please follow the link below to request access.

[Sign up to request access](#)

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.

 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.

💡 WhatsApp onboards 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

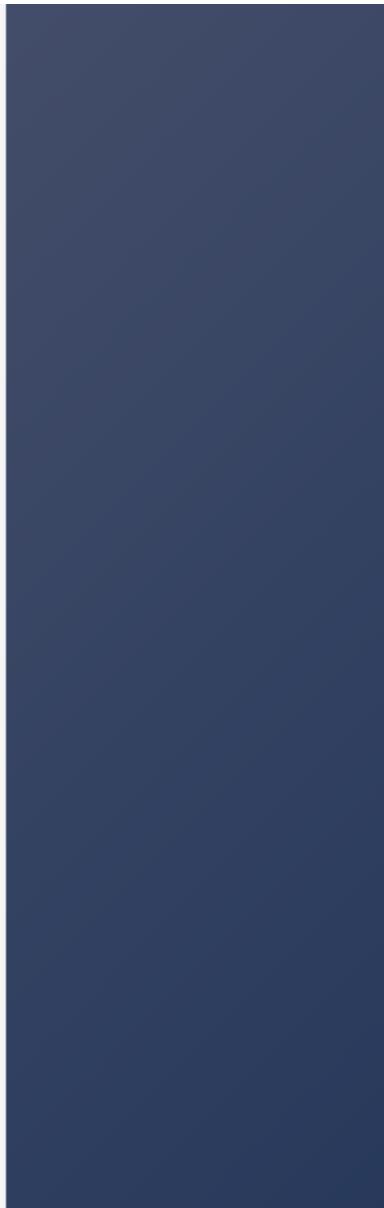
Company Website*

[https://\[REDACTED\]](https://[REDACTED])

Company HQ Country*

Malaysia





Twilio Account SID*
AC-[REDACTED]

Facebook Business Manager ID*
[REDACTED]

Company Vertical*
Healthcare Products/Supplements ▾

What is your use case?*
Customer Support ▾

Which regions are you sending messages to?*
South-East Asia ▾

How many messages are you sending per month during the first year?*
0 - 10,000 ▾

I understand Twilio can modify my SMS/Voice URL and that approval is only for the brand submitted.*
Yes ▾

I want early access to beta features related to WhatsApp

Request Now

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.

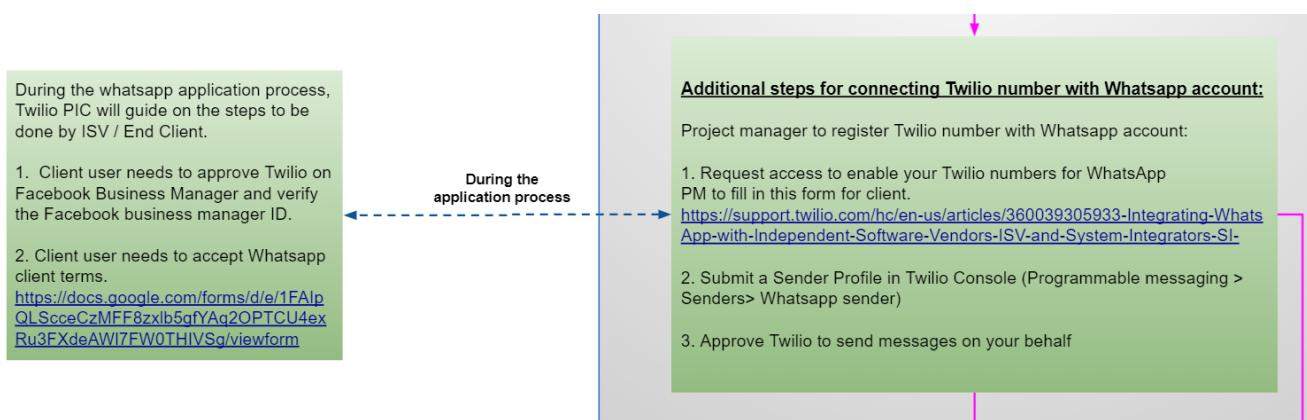
1. **End client:** Clients that wish to use the Twilio APIs for WhatsApp through an ISV/SI must accept the WhatsApp Client Terms (*Please see attached*). Please ensure that your client reviews the attached document and confirms their acknowledgement here: [WhatsApp Client Terms – Confirm Acknowledgement](#).

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](#)

<h3>WhatsApp Client Terms</h3> <p>Clients that wish to use the Twilio APIs for WhatsApp through a third party vendor must accept the WhatsApp Client Terms (https://docs.google.com/document/d/1p0ShAvVg6jN1C78Wcm93lzcAk1DyaSvj5Pzy1z956M/edit).</p> <p>This applies to any clients working with third party vendors, including but not limited to independent software vendors ("ISV") and software integrators ("SI").</p> <p>* Required</p>	<p>ISV, SI or Third Party Vendor's Company *</p> <p>The company name for the independent software vendor (ISV), software integrator (SI) or third party vendor who is implementing the Twilio APIs for WhatsApp on the brand's behalf.</p> <p>Your answer Include ISV/SI name here</p>
<p>Email address *</p> <p>Your email Include client's email here</p>	<p>Your (client) Name *</p> <p>This should be the name of an employee in the Company who has the authority to (a) verify that the information submitted herein is correct, and (b) accept the WhatsApp Business Solution terms on behalf of the Company.</p> <p>Your answer Include client's name here</p>
<p>Company Name *</p> <p>The company name ("Company") for the brand or end client. This is not the third party vendor's company.</p> <p>Your answer Include client's company name here</p>	<p>Your (client) Work Email (or work email of the employee in the previous answer) *</p> <p>Your answer Include client's email here</p>
<p>Website *</p> <p>The client's website. This is not the website for the ISV, SI or third party vendor.</p> <p>Your answer Include client's company website here</p>	<p>The information you provide will be used to register your business with the Twilio API for WhatsApp on behalf of the Company. We will use your information according to Twilio's Privacy Policy (https://www.twilio.com/legal/privacy).</p> <p>You agree to the WhatsApp Client Terms *</p> <p>You have reviewed and agree to the following WhatsApp Client Terms: https://docs.google.com/document/d/1p0ShAvVg6jN1C78Wcm93lzcAk1DyaSvj5Pzy1z956M/edit</p> <p><input type="checkbox"/> Accept ← Accepted by client</p>

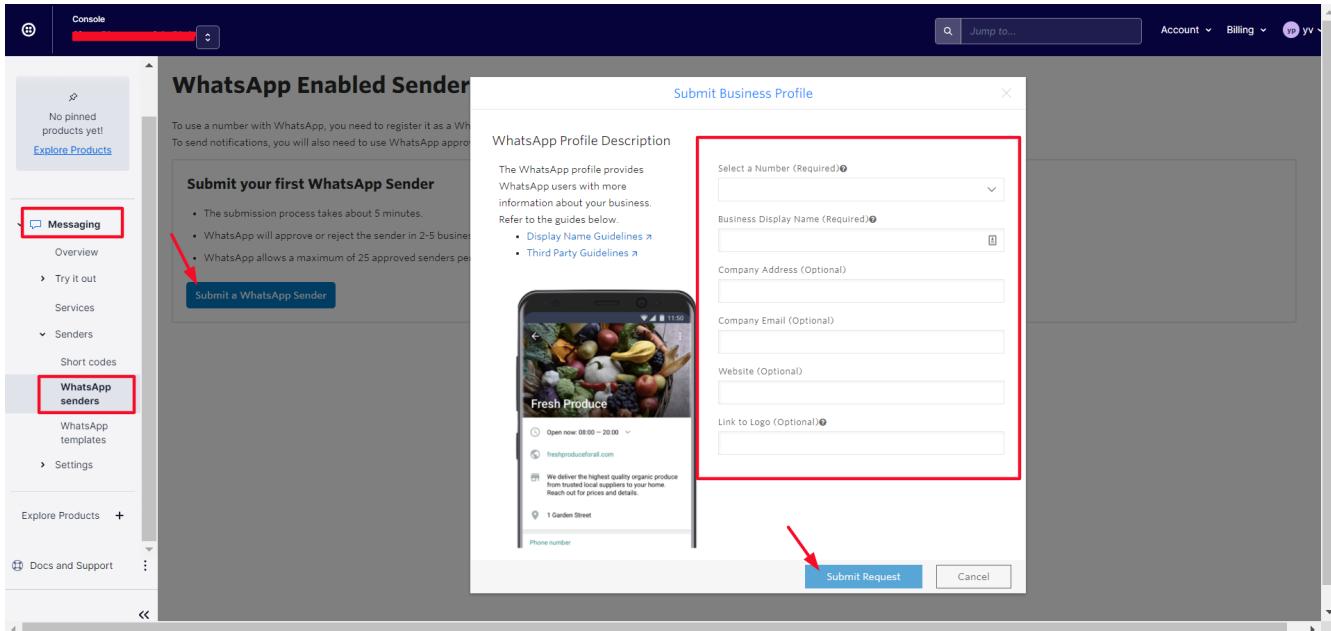
6.5 The above processes might be taking 1-3 months depends on the submitted information. (This is referring to these stages in the standard UCC implementation workflow below.)



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.

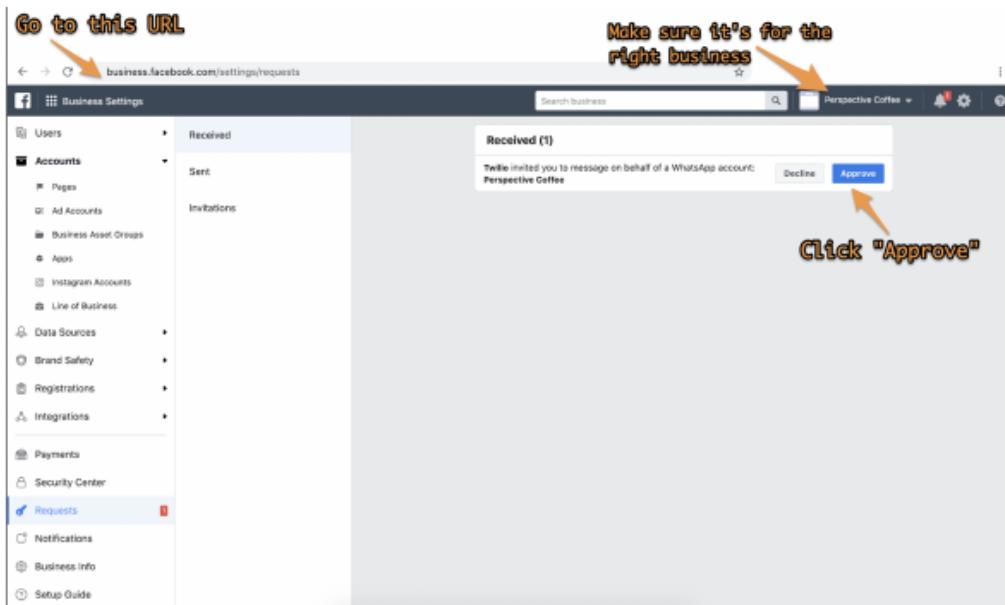
Thank you for submitting your sender profile request!

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)

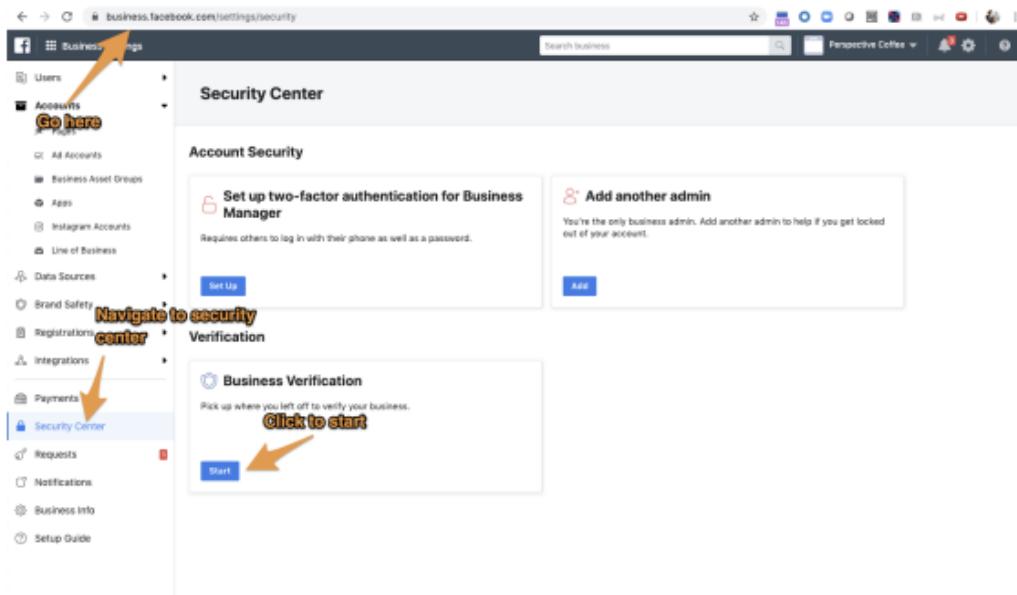
- Go to your Facebook Business Manager account [here](#)
- Verify it is the right business account
- Approve the request – This is to ensure to give Twilio permission to set up your WhatsApp Business Account.



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.

The screenshot shows the Twilio Console interface. The left sidebar has a 'Messaging' section with a 'WhatsApp senders' link highlighted by a red box and arrow. The main content area is titled 'WhatsApp Enabled Senders'. It contains a table with columns: WHATSAPP NUMBER, BUSINESS DISPLAY NAME, STATUS, and ACTIONS. One row in the table shows a status of 'Approved by WhatsApp' with an 'Edit Sender' button in the ACTIONS column, also highlighted by a red arrow.

WhatsApp senders / Business display name

This information will be shown to WhatsApp users when they are interacting with your business. Twilio recommends adding this information because it has shown to increase message recipients' trust of your senders and increase engagement.

Profile photo - Optional
JPG or PNG, 640x640 pixels or larger, square ratio
 Select file Delete file

Business address - Optional
Address

Business website - Optional

Business email - Optional

Business description (256 characters) - Optional
Limit to 256 characters - currently 36

Update WhatsApp Sender Cancel Delete sender

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

WHATSSAPP NUMBER	BUSINESS DISPLAY NAME	STATUS	ACTIONS
[REDACTED]	[REDACTED]	ⓘ Waiting for WhatsApp approval of display name	Edit Sender

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.

The screenshot shows the Twilio Console interface. The left sidebar has a 'Develop' tab selected, with a red arrow pointing to the '# Phone Numbers' section. Another red arrow points to the 'Messaging' section under 'Explore Products'. The main area displays 'Project Info' with sections for 'BALANCE', 'REFERRAL PROGRAM', and 'ACCOUNT SID'. A 'Feedback' button is visible on the right.

Please go to Phone Number > Messaging

The screenshot shows the Twilio Console interface. The left sidebar has a 'Messaging' tab selected, with a red arrow pointing to the 'WhatsApp templates' section. The main area is titled 'WhatsApp Message Templates' and contains instructions to start conversations with WhatsApp users. It features a 'New message template' button and a table listing two message templates: 'new_conversation_message' and 'welcome_message'. Both templates are in English and have been approved by WhatsApp. A 'Feedback' button is visible on the right.

TEMPLATE NAME	MESSAGE TEXT	MESSAGE LANGUAGE	MESSAGE TEMPLATE STATUS	ACTIONS
new_conversation_message	Hi! Thank you for [REDACTED] p! How can we help you?	English	✓ 1/1 translation approved by WhatsApp	Add translations
welcome_message	Hi! Thank you for reaching out to us. Please leave us an y query that you may have, we will get back to you short ly.	English	✓ 1/1 translation approved by WhatsApp	Add translations

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

WhatsApp templates / General Information

Template name 1
welcome_message
Can only contain lowercase alphanumeric characters and underscores

Template category 2
Select template category...
This category will be provided to WhatsApp's template reviewers.

Message Template

If you need the same template in different languages, add multiple languages and indicate the corresponding translated message bodies for each. All template translations are more likely to get approved if submitted together.
[Learn tips to get approved](#)

Message language 3
Please select a language

Message body (1024 characters or less) 4
Your login code for {{1}} is {{2}}

Use double curly braces to indicate where you plan to use dynamic content. For example, to send "Your login code for Twilio is 1234", the template would be: "Your login code for {{1}} is {{2}}." [Learn more](#)

Buttons - Optional 5
These will be shown as clickable buttons below your message.
 None
 Call to action
 Quick reply

Add a template translation 6

Submit message template 6 Delete draft

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]

Permission Set name	UI	TEAM1 e.g. admin	TEAM2 e.g sales agent
1	All Tasks Queue	yes yes	no no
THIS IS FOR ALL ACTIVE TASKS IN THE QUEUE			
4	Team Tasks Queue		
5			
THIS IS FOR Inbox			
9	My Tasks		
10	All Tasks		
11			
12			
THIS IS FOR CHAT			
15	Chat functions (send text, media, etc..)		
16			
17			
THIS IS FOR CUSTOMER DETAILS			
19	Personal Info		
20	Contact Merging		
21			

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

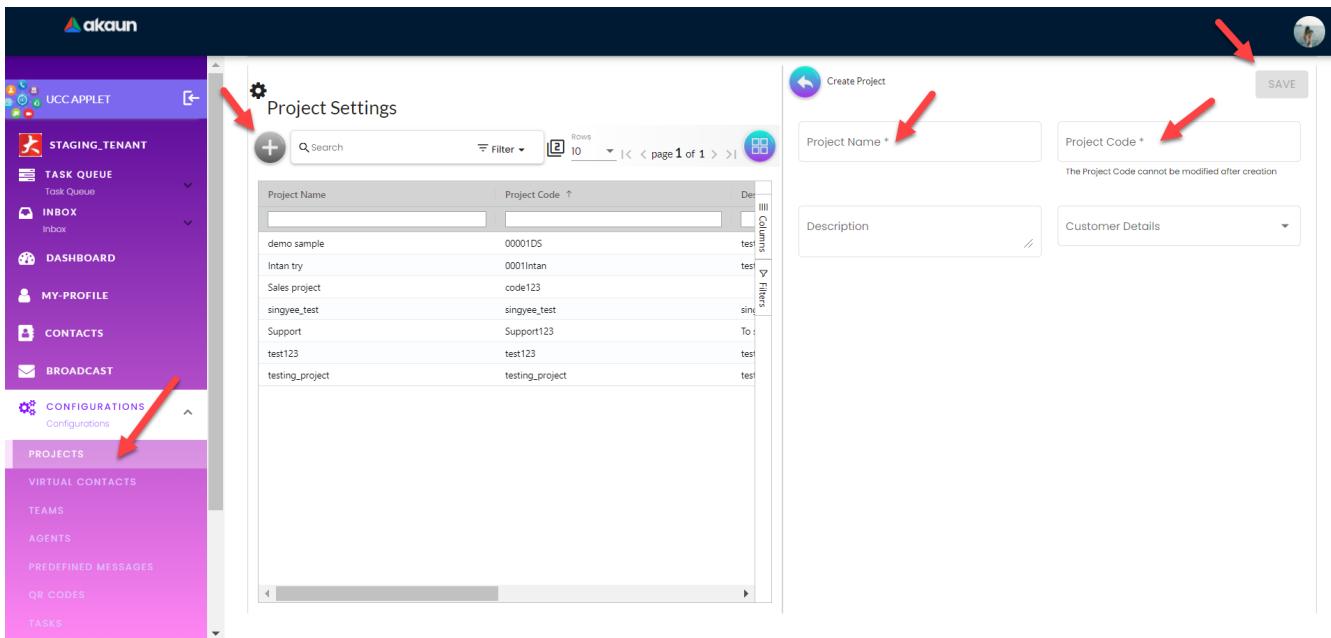
once Lina completes the permission template implementation in UCC applet, then the above section 3 is not required anymore as client PIC/admin users can do the permission assignment from their side. Please always follow up with Lina for the latest update on this permission part beforehand.

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.

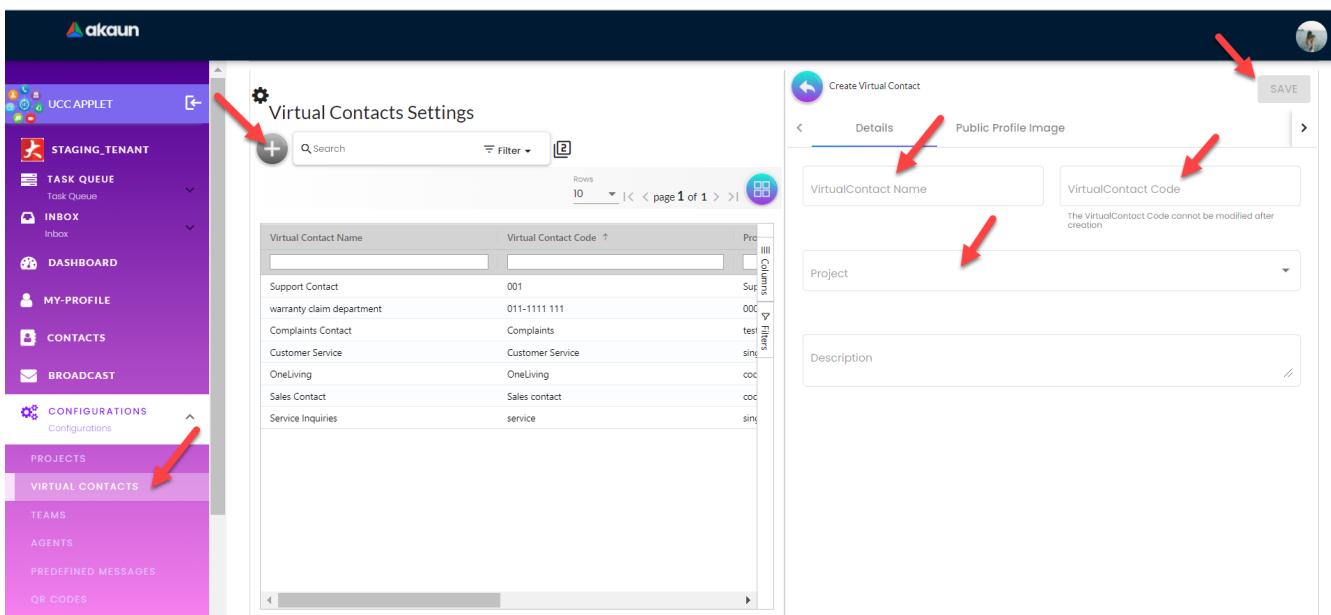
- Project Name*
- Project Code*
- Description
- Customer Details



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.

Virtual Contacts Settings

Virtual Contact Name	Virtual Contact Code	Project	Status
Support Contact	001	Support123	ACT
warranty claim department	011-1111 111	0001Intan	ACT
Complaints Contact	Complaints	testing_project	ACT
Customer Service	Customer Service	singyee_test	ACT
OneLiving	OneLiving	code123	ACT
Sales Contact	Sales contact	code123	ACT
Service Inquiries	service	singyee_test	ACT

Details Public Profile Endpoints

Virtual Contact Name * Sales Contact

Virtual Contact Code * Sales contact

Project code123 (Sales project)

Status Active

Description For sales

Created By

Creation Date 2021-01-15 14:59:34

Modified By

Modified Date 2021-07-30 10:06:25

Virtual Contacts Settings

Virtual Contact Name	Virtual Contact Code	Project	Status
Support Contact	001	Support123	ACT
warranty claim department	011-1111 111	0001Intan	ACT
Complaints Contact	Complaints	testing_project	ACT
Customer Service	Customer Service	singyee_test	ACT
OneLiving	OneLiving	code123	ACT
Sales Contact	Sales contact	code123	ACT
Service Inquiries	service	singyee_test	ACT

Details Public Profile Endpoints

Choose Image... Browse

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.

The screenshot shows the 'Virtual Contacts Settings' page. On the left, there's a sidebar with various menu items like UCC APPLET, STAGING_TENANT, TASK QUEUE, INBOX, DASHBOARD, MY PROFILE, CONTACTS, BROADCAST, CONFIGURATIONS, PROJECTS, VIRTUAL CONTACTS (which is selected), TEAMS, AGENTS, PREDEFINED MESSAGES, QR CODES, and TASKS. The main area has a title 'Virtual Contacts Settings' and a sub-section 'Edit Virtual Contact'. It has tabs for 'Details', 'Public Profile', and 'Endpoints'. The 'Endpoints' tab is currently active and highlighted with a red box. Below the tabs is a search bar and a table with columns: Endpoint Id, Virtual Contact Name, and Channel Name. A large red arrow points from the bottom right towards the 'Endpoints' tab.

This screenshot shows the 'Create Endpoint' page. It has tabs for 'Details', 'Public Profile', and 'Endpoints'. The 'Endpoints' tab is active. There's a search bar and a table with columns: Endpoint Id, Virtual Contact Name, and Channel Name. To the right of the table, there's a form for creating a new endpoint. The fields shown are: Channel * (highlighted by a red arrow), Endpoint Id * (highlighted by a red arrow), Endpoint Name / UserName * (highlighted by a red arrow), First Name, Last Name, Provider * (highlighted by a red arrow), Access / Account ID, and Auth Token. A note at the bottom says 'Append agent name to the message.' A red arrow also points from the top right towards the 'Add Endpoint' button.

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:

mC3iYWJ0tG09VAxkR

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.20.14.4. 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:

mC3iYWJ0tG09VAxkR

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

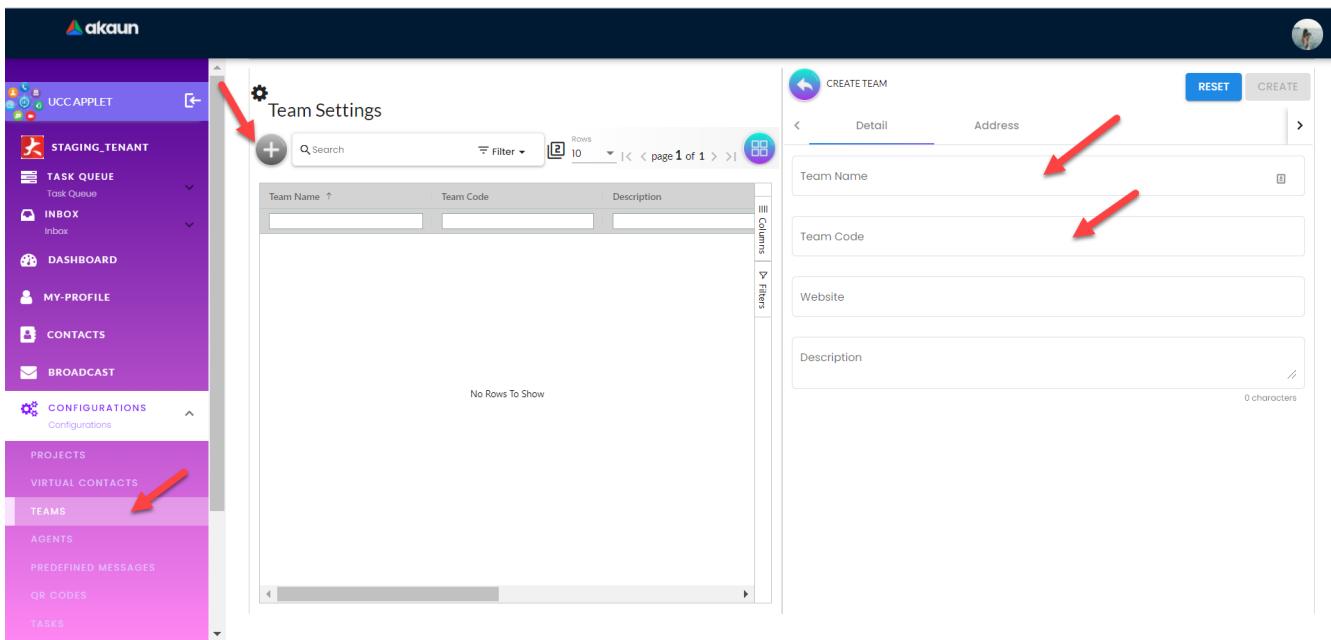
[Telegram](#). To learn how to create

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.

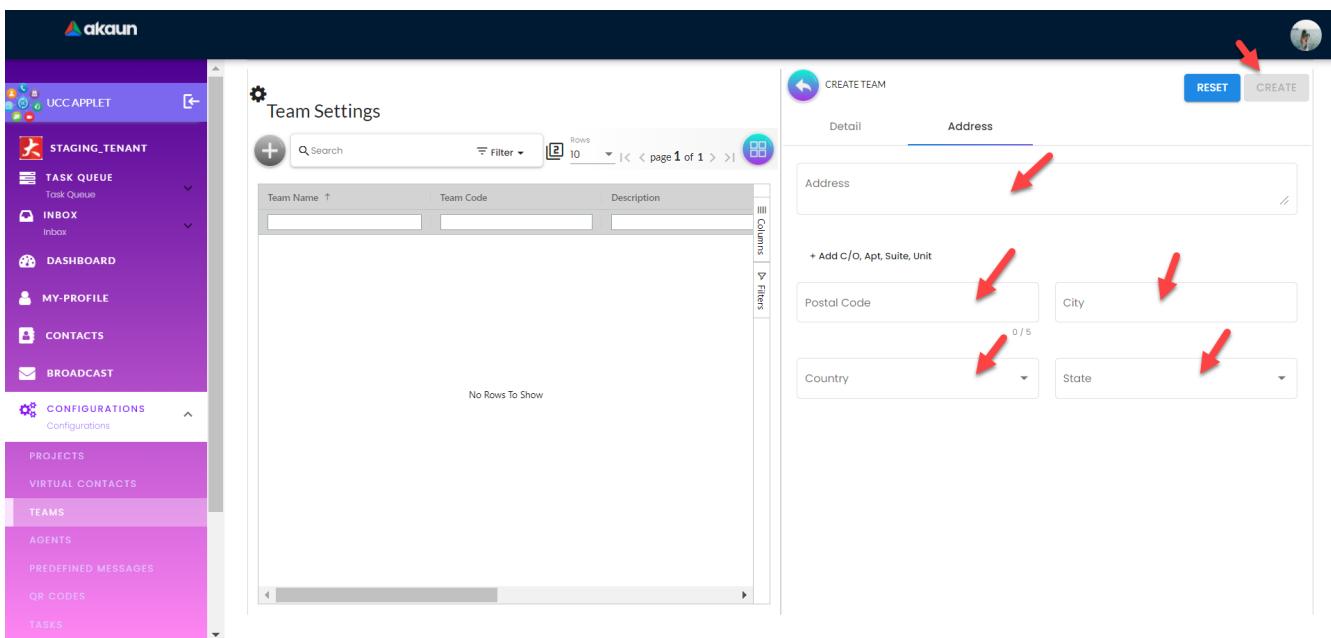
Under [Details] Tab:

- 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

Agents Settings

Name	Code	Description
Amirul	Amirul	
Amriyadi	Amriyadi	
Bahaa	Bahaa	
Diana	Diana	
Flavia	Flavia	
Hafiz	Hafiz	
IdaAmin	Ida	
Intan	AC0001	
Josephine	Josy	
Kai Ying	Kaiying	

ADD AGENTS

Agent Email

Agent Code

The Agent Code cannot be modified after creation

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)

Project Settings

Project Name	Project Code	Description
demo sample	00001DS	testing
Intan try	0001Intan	testing only
Sales project	code123	
singyee_test	singyee_test	singyee_test
Support	Support123	To support clients
test123	test123	test123
testing_project	testing_project	testing_project

Edit Project

DELETE

SAVE

Agents

+ Add Agent

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)

Message Name	Message Body	Message Status	Actions
Welcome Message	Hi Nice to meet you! Is there a...	ACTIVE	
testing	hi thank you for reaching out to...	ACTIVE	
Twilio WhatsApp	Dear {{[1]}} Your issue {{[2]}} has b...	ACTIVE	

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.

Virtual Contacts Settings

Edit Virtual Contact

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

Virtual Contacts

Endpoints

Predefined Messages

Message Name	Message Body	Message Status
testing	hi thank you for reaching out ...	ACTIVE
Twilio WhatsApp	Dear {{[1]}}, Your issue {{[2]}} has b...	ACTIVE

Virtual Contacts

Predefined Messages

Add Template Message

Message Body

Automated Greeting Event

Description

ADD Template Message(s)

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:

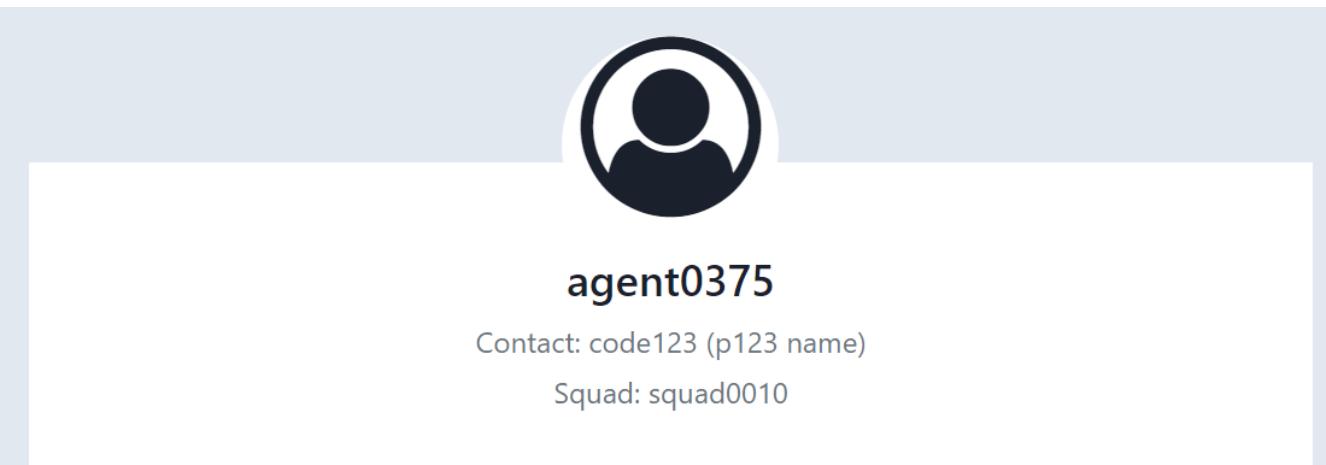
- Virtual Contact
- Squad Code
- QR Code
- Agent Code

- 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.

The screenshot shows the 'QR Codes Settings' page with a table of QR codes. A red arrow points from the URL below to the generated QR code at the bottom right.

https://api.akaun.dev/core2/tnt/dm/ale/cc/virtual-contact/public-profile/development_tenant?virtualContactGuid=9aae89793-bee0-1c51-037b-f44acc7354fb&squadGuid=2a41fb07-a496-938d-a07a-82code56e1a6f&agentGuid=55308290-800f-f63e-53e8-8f859cf768e2



Website	https://www.google.com
Address	No. 24B, 2nd Floor Jalan USJ 10/1B, Jalan USJ 10/1a, Taipan Business Centre, Subang Jaya, Selangor, 47620, Malaysia
Telegram	lolo_sh_bot
Whatsapp	abc
Whatsapp	asdf

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.

The screenshot shows the akaun Unified Contact Center interface. On the left, there's a sidebar with navigation links: DASHBOARD, MY PROFILE, BROADCAST, INBOX (Inbox), SETTINGS (Settings), PROJECTS, VIRTUAL CONTACTS, SQUADS, AGENTS, PREDEFINED MESSAGES, and QR CODES. The main area is titled "Unified Contact Center" and shows a profile for "YV Wavelet" with the email "yv@wavelet.net". Below the profile picture, it says "Full Name: YV Wavelet" and "Email: yv@wavelet.net". There are tabs for "About Me", "QR Codes" (which is currently selected and highlighted in red), and "Settings". To the right of the profile, there's a large QR code with a "Download" button below it. Below the QR code, the text "code123" is under "Virtual Contact" and "squadsales0001" is under "Squad".

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.

The screenshot shows the akaun Unified Contact Center interface. On the left, there's a sidebar with navigation links: DASHBOARD, MY-PROFILE, BROADCAST, INBOX (Inbox), SETTINGS (Settings), PROJECTS, VIRTUAL CONTACTS, SQUADS, AGENTS (selected), PREDEFINED MESSAGES, and QR CODES. The main area is titled 'Agents Settings' and contains a table of agent data. The table has columns for Agent Email, Name, Code, Description, Active From, Active To, and Status. A blue row is selected, highlighting 'asma85@wavelet.net'. The table shows 10 rows of data. In the top right of the main area, there's a 'Generate QR Code(s)' button with a red arrow pointing to it.

Agent Email	Name	Code	Description	Active From	Active To	Status
<input checked="" type="checkbox"/> alamin@senwave.com.my	alamin	agent0015		2021-02-22T09:14:00Z	2021-02-22T09:14:00Z	ACTIVE
<input checked="" type="checkbox"/> hari@senwave.com.my	Hari	agent0024	Testing	2021-03-25T15:40:00Z	2021-03-31T12:36:00Z	ACTIVE
<input checked="" type="checkbox"/> haknazar@wavelet.net	Haknazar	agent0045	Testing-	2021-03-16T11:55:00Z	2021-03-16T11:55:00Z	ACTIVE
<input checked="" type="checkbox"/> asmaa+75@wavelet.net	Asmaa75	agent0062	Test	2021-03-24T07:32:00Z	2021-03-09T07:02:00Z	ACTIVE
<input checked="" type="checkbox"/> asmaa+53@wavelet.net	Asmaa53	agent0375	Testing	2021-03-19T11:38:00Z	2021-03-19T11:38:00Z	ACTIVE
<input checked="" type="checkbox"/> chiaqian@wavelet.net	Chiaqian	agent0098				ACTIVE
<input checked="" type="checkbox"/> asma85@wavelet.net	Asma85	agent0003	Testing	2021-02-21T13:30:00Z	2021-02-28T13:30:00Z	ACTIVE
<input type="checkbox"/> asmaa+52@wavelet.net	Asmaa	agent0093	Test Asmaa	2021-03-25T09:14:00Z	2021-03-24T09:14:00Z	ACTIVE
<input type="checkbox"/> diana@wavelet.net	Diana	agent0004	Test	2021-02-22T08:48:00Z	2021-03-01T08:48:00Z	ACTIVE
<input type="checkbox"/> asmaa+8@wavelet.net	Asmaa8	agent0453		2021-03-17T08:54:00Z	2021-03-24T08:54:00Z	ACTIVE

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 moqups:
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/190mgwglZ6QfZVdnfQQQ65VcreWfqssJhCDzy_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

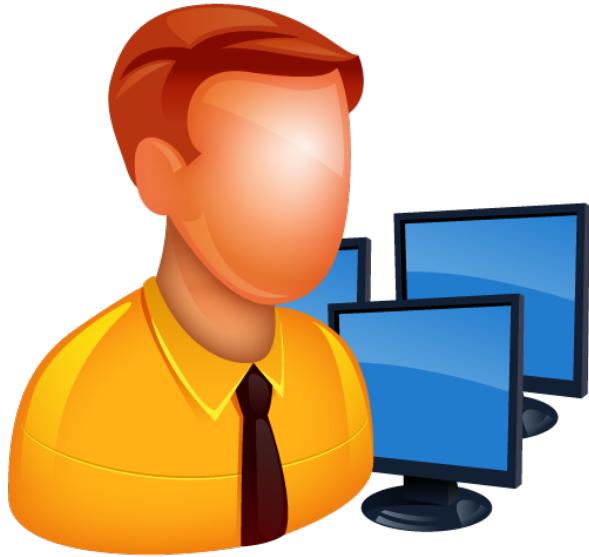
A.21.8. Pricing

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

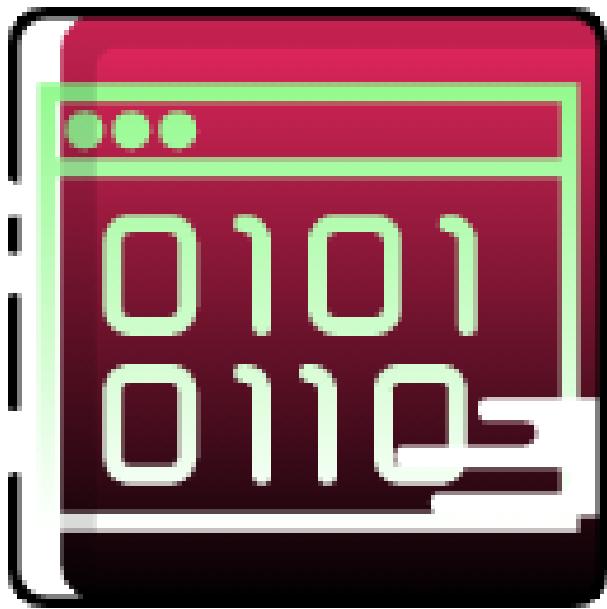
A.23.8. Pricing

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

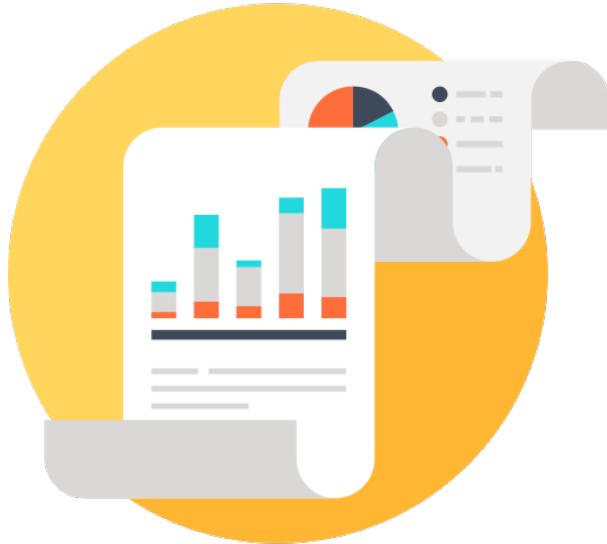
A.24.8. Pricing

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

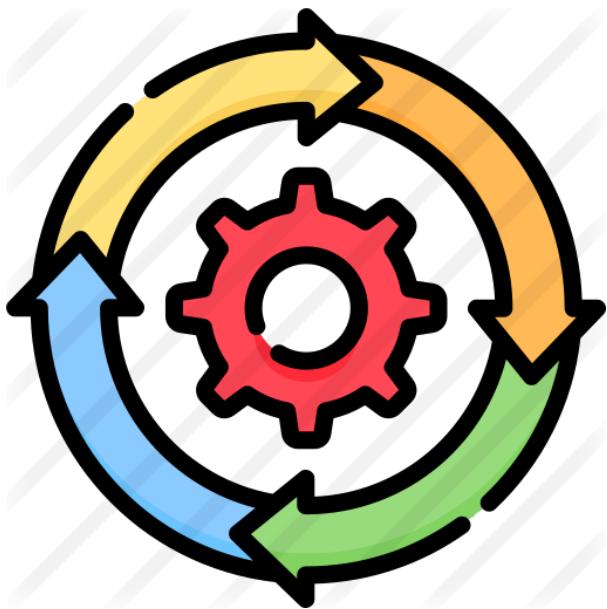
A.26.8. Pricing

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

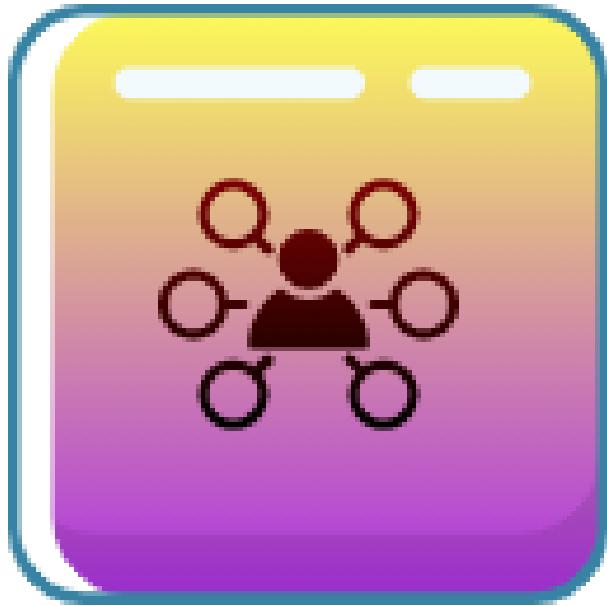
A.32.8. Pricing

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”](#)
- [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.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

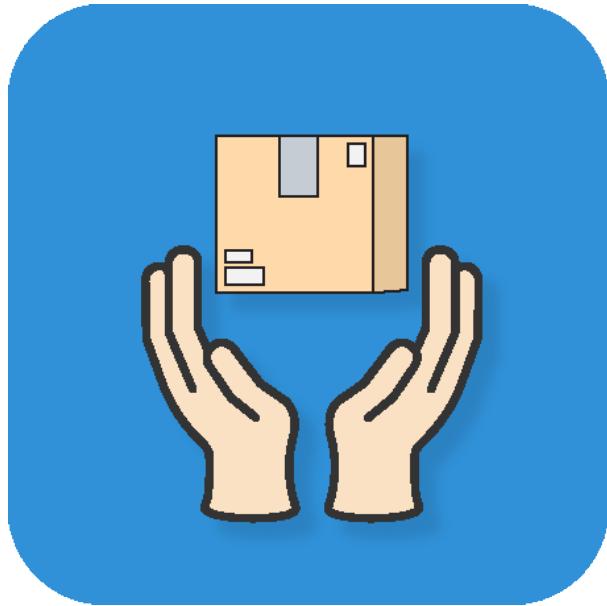
A.33.8. Pricing

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

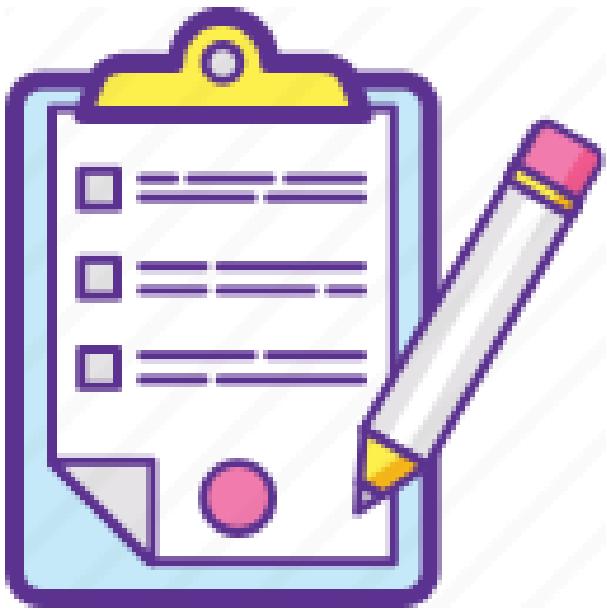
A.37.8. Pricing

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

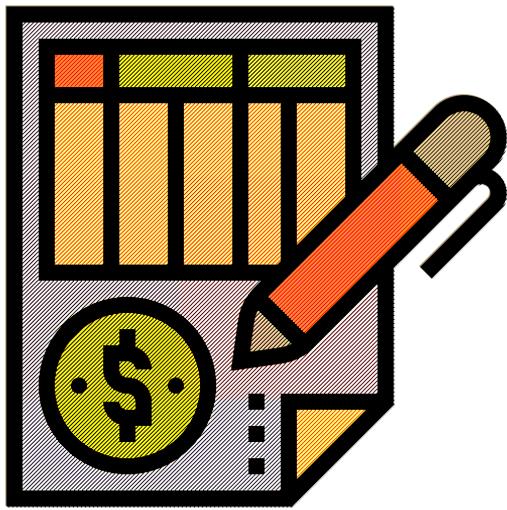
A.41.8. Pricing

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

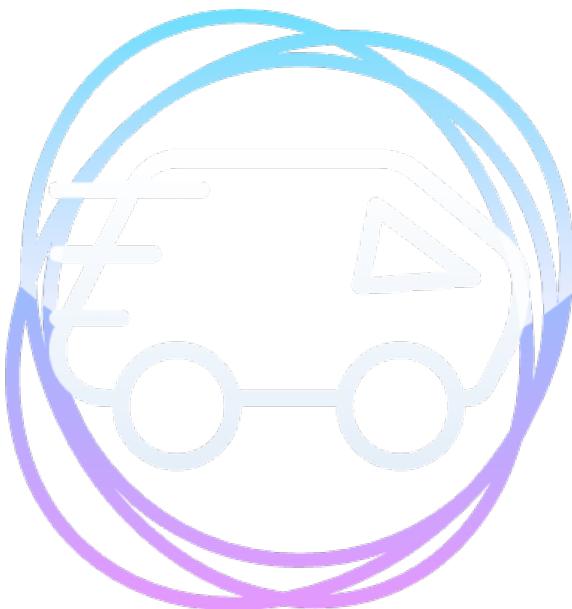
A.49.8. Pricing

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

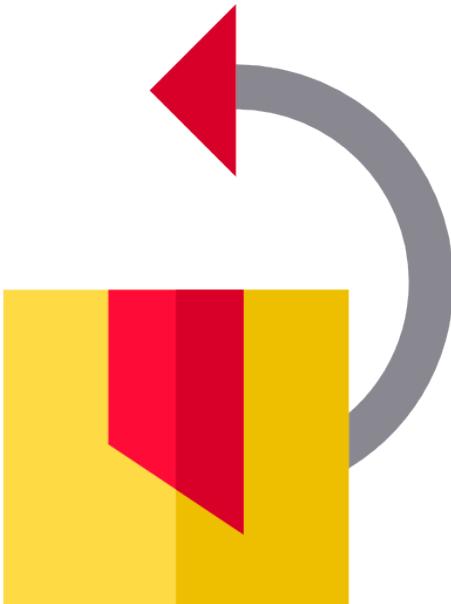
A.52.8. Pricing

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

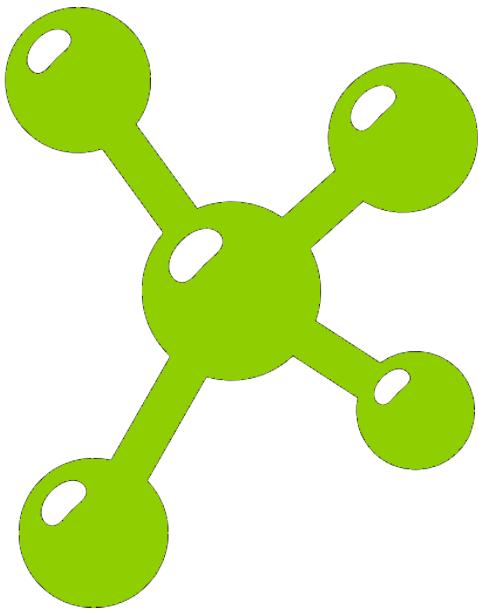
A.54.8. Pricing

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

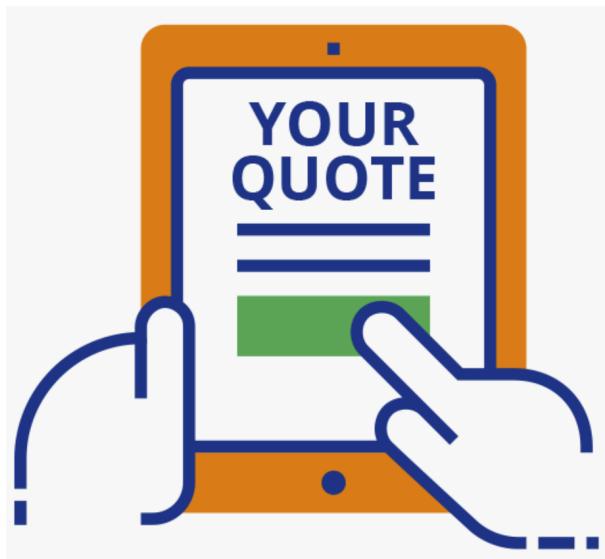
A.62.8. Pricing

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



Designed by [pngtree](#)

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”](#)
- [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.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