USER GUIDE

All guides

22 guides in one file. Tap a name to go to that guide.

RETAILTECH

Retail POS	35 pages
Inventory with RFID	23 pages
E-commerce	32 pages
Outlet audit	15 pages
Project management	46 pages
Staff ideas (WITS)	28 pages

HRTECH

Recruitment	70 pages
Appraisal	30 pages
Competency test	35 pages
Staff memo	30 pages
KPI board	19 pages
Staff incentive	39 pages

FINTECH

Payment system	24 pages
Closed-loop e-wallet	24 pages

MARTECH

Customer service	30 pages
Customer feedback	24 pages
vKad name card	23 pages
Membership and Loyalty	18 pages
SuperApp (mobile)	40 pages
Broadcasting server	19 pages

CORE SYSTEMS

Master data	14 pages
App API server	3 pages

USER GUIDE · VERSION 1

Retail POS

The till at the counter and the back office behind it: sell and take payment, close the day, and look after products, prices, stock, promotions and reports for every outlet.

1. What it is for
2. Sign in and choose your outlet
3. Open the till at the start of the day
4. Make a sale
5. Return or exchange an item
6. Put cash in or take cash out
7. Close the day
8. Find a past sale
9. Products and prices
10. Look after stock
11. Run a promotion
12. Look up a member
13. Read the reports
14. Outlets and tills
15. Users and roles

What it is for

For: Everyone

Retail POS is the till at your outlets' counters and the back office behind it. At the till, staff open the drawer, scan items, add the member, take payment, give the receipt, handle returns and close the day. In the back office, managers look up past sales and look after products, prices, stock, promotions, reports and the tills themselves.

Who uses it

Role	What they do
Beauty advisor	Sells at the till.
Store manager	Runs an outlet: approves voids, refunds and discounts above an advisor's limit, counts and receives stock.
Area manager	Looks after several outlets.
Merchandising	Products, prices and promotions.
Finance	Sales, payments and reports.
IT administrator	Outlets, tills, printers, users and roles.

The menu only shows the pages your role may use, so yours may be shorter than the one in these pictures.

What it needs from other systems

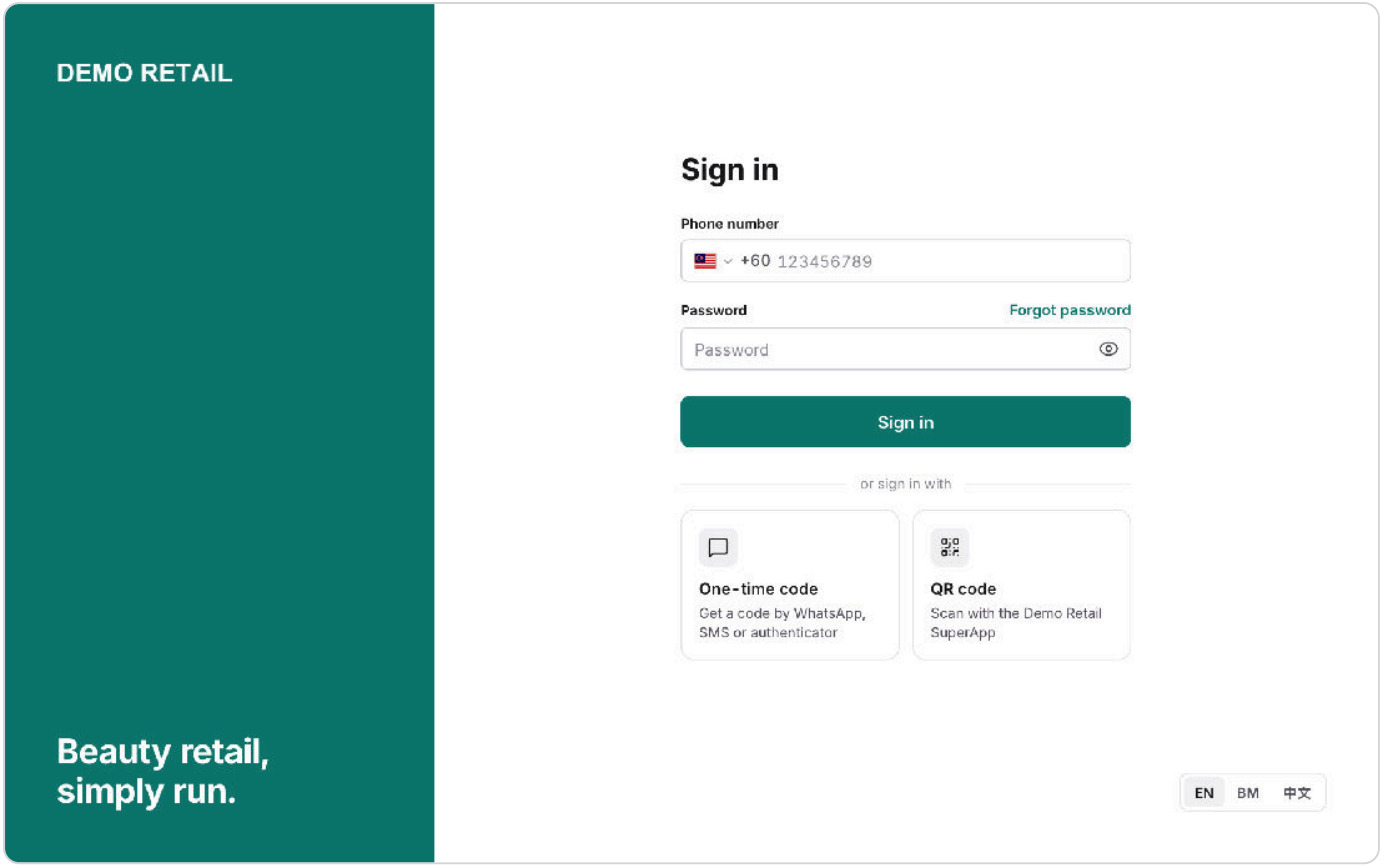
- Staff and outlets come from your company's central records (Master data) and update every night.
- Members, their points and vouchers come from Membership and Loyalty. The POS shows them but cannot change them.
- FPX, Card online and DuitNow payments go through RHB Pay.

RETAIL POS

Sign in and choose your outlet

For: Everyone

1. Open the POS in your web browser.
2. Type your **Phone number** and **Password**, then press **Sign in**.
3. No password? Press **One-time code** to get a code by WhatsApp, SMS or an authenticator app, or **QR code** to sign in with your phone.
4. To change the language, press **EN**, **BM** or **中文**.

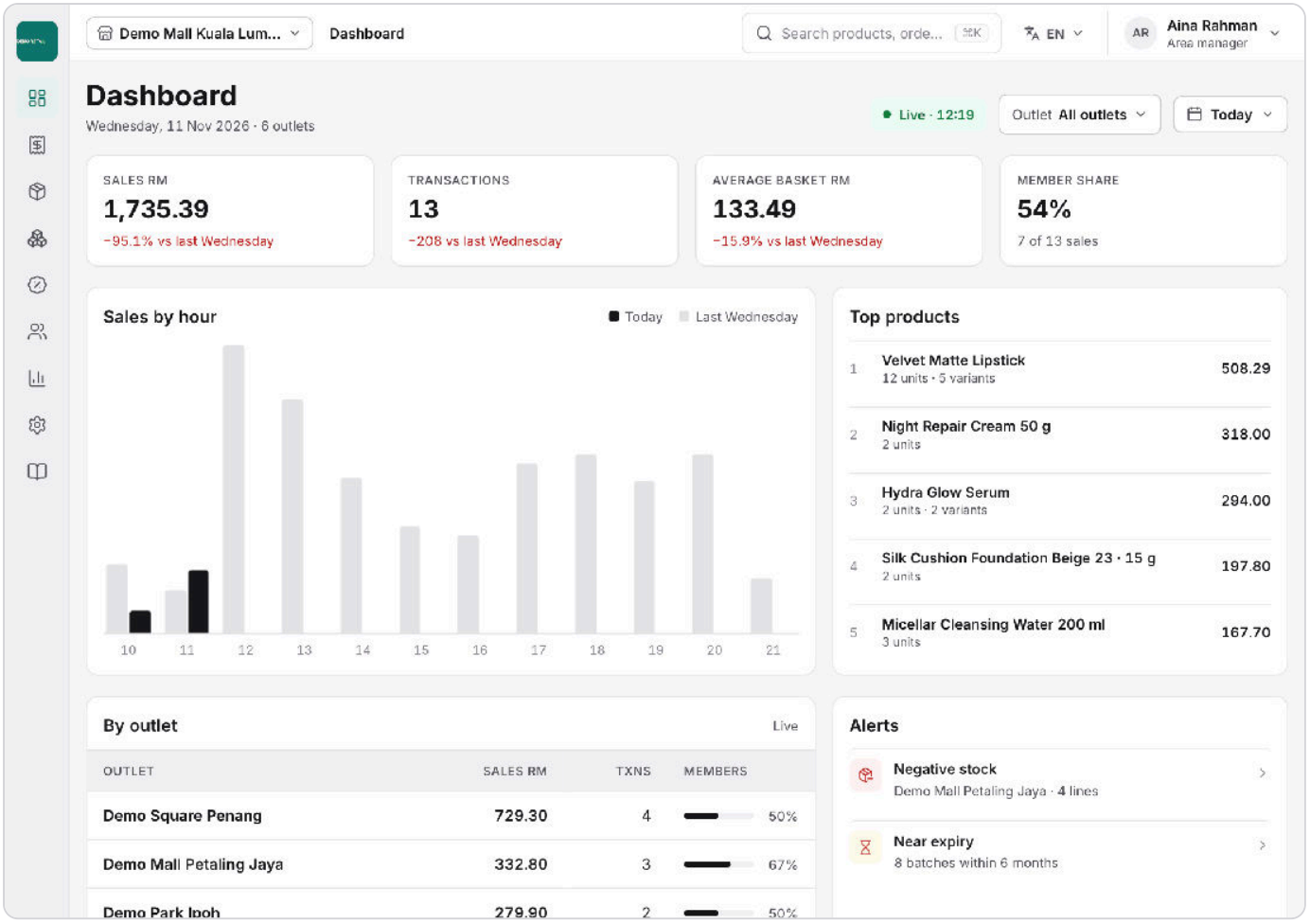


The dashboard

After signing in you land on the **Dashboard**.

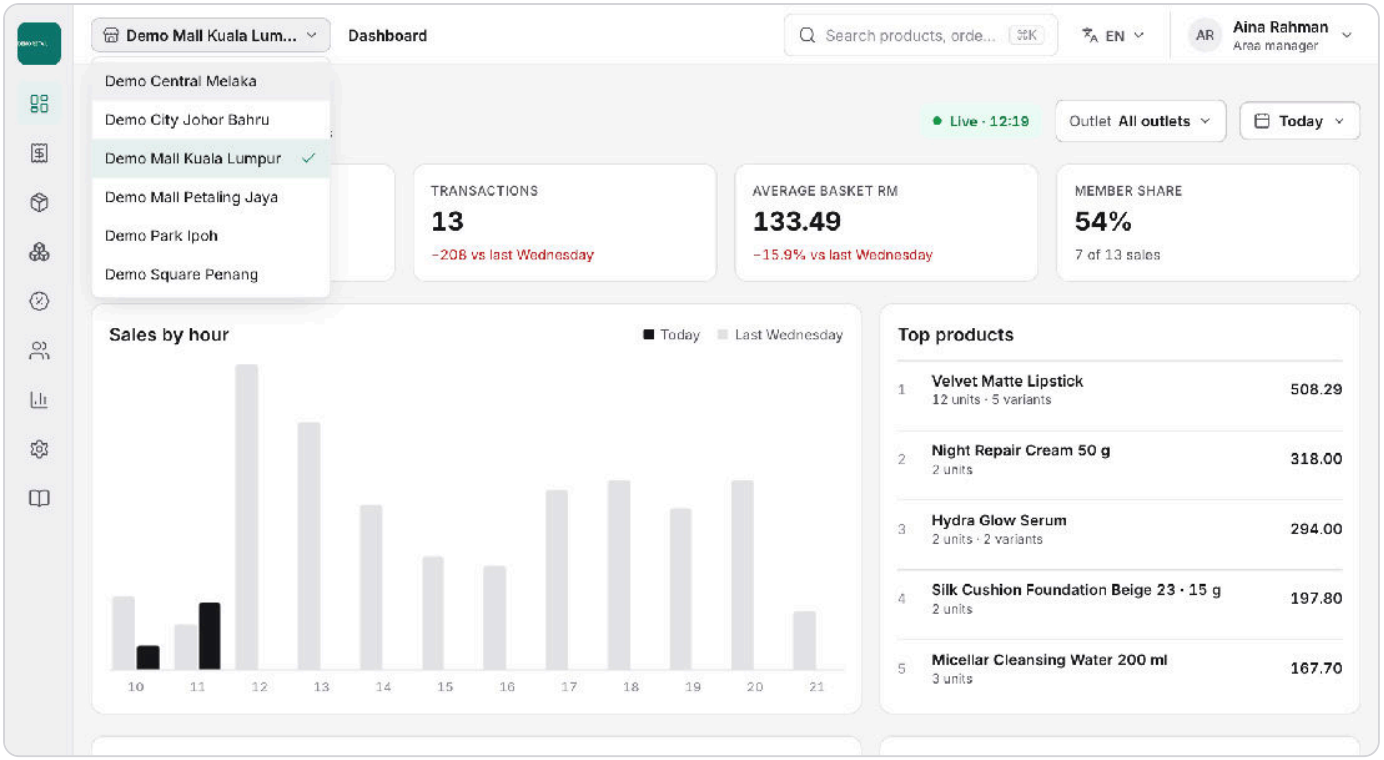
- The four boxes at the top show today's sales, number of sales, average sale value, and the share of sales made to members.
- Below them: sales by hour, best-selling products, sales per outlet, and **Alerts** that need attention, such as stock below zero or stock close to expiry.
- Use **Outlet** and **Today** at the top right to look at another outlet or another day.

- To jump to any page or setting, press Ctrl+K (⌘K on a Mac) or click the search box at the top and type what you need.



Choose your outlet

Stock, terminal and some report pages work on one outlet at a time. Click the outlet name at the top left and pick the outlet from the list.


Demo Mall Kuala Lum...
Dashboard
Search products, orde... ⌘K
EN
AR
Aina Rahman
Area manager
Demo Central Melaka
Demo City Johor Bahru
Demo Mall Kuala Lumpur
Demo Mall Petaling Jaya
Demo Park Ipoh
Demo Square Penang
Live · 12:19
Outlet All outlets
Today
TRANSACTIONS
13
−208 vs last Wednesday
AVERAGE BASKET RM
133.49
−15.9% vs last Wednesday
MEMBER SHARE
54%
7 of 13 sales
Sales by hour
Today
Last Wednesday
10
11
12
13
14
15
16
17
18
19
20
21
Top products
1 Velvet Matte Lipstick
12 units · 5 variants
508.29
2 Night Repair Cream 50 g
2 units
318.00
3 Hydra Glow Serum
2 units · 2 variants
294.00
4 Silk Cushion Foundation Beige 23 · 15 g
2 units
197.80
5 Micellar Cleansing Water 200 ml
3 units
167.70

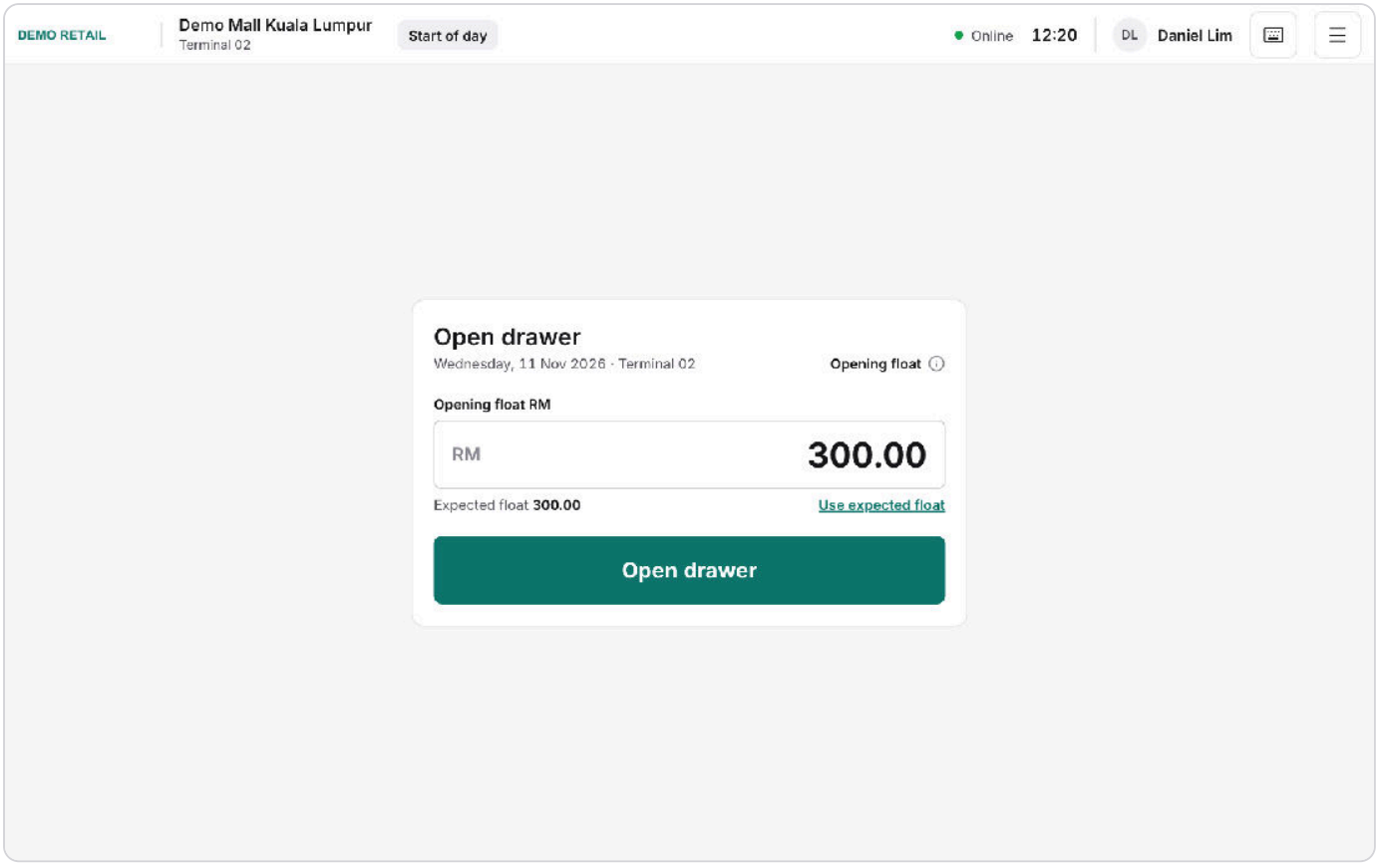
RETAIL POS

Open the till at the start of the day

For: Beauty advisors, Store managers

The first time the till opens each day, it asks how much cash is already in the drawer (the "float").

1. Type the total amount under **Opening float RM**, or press **Use expected float** if it matches.
2. If the amount is different from the expected float, a store manager has to approve it.
3. Press **Open drawer**.



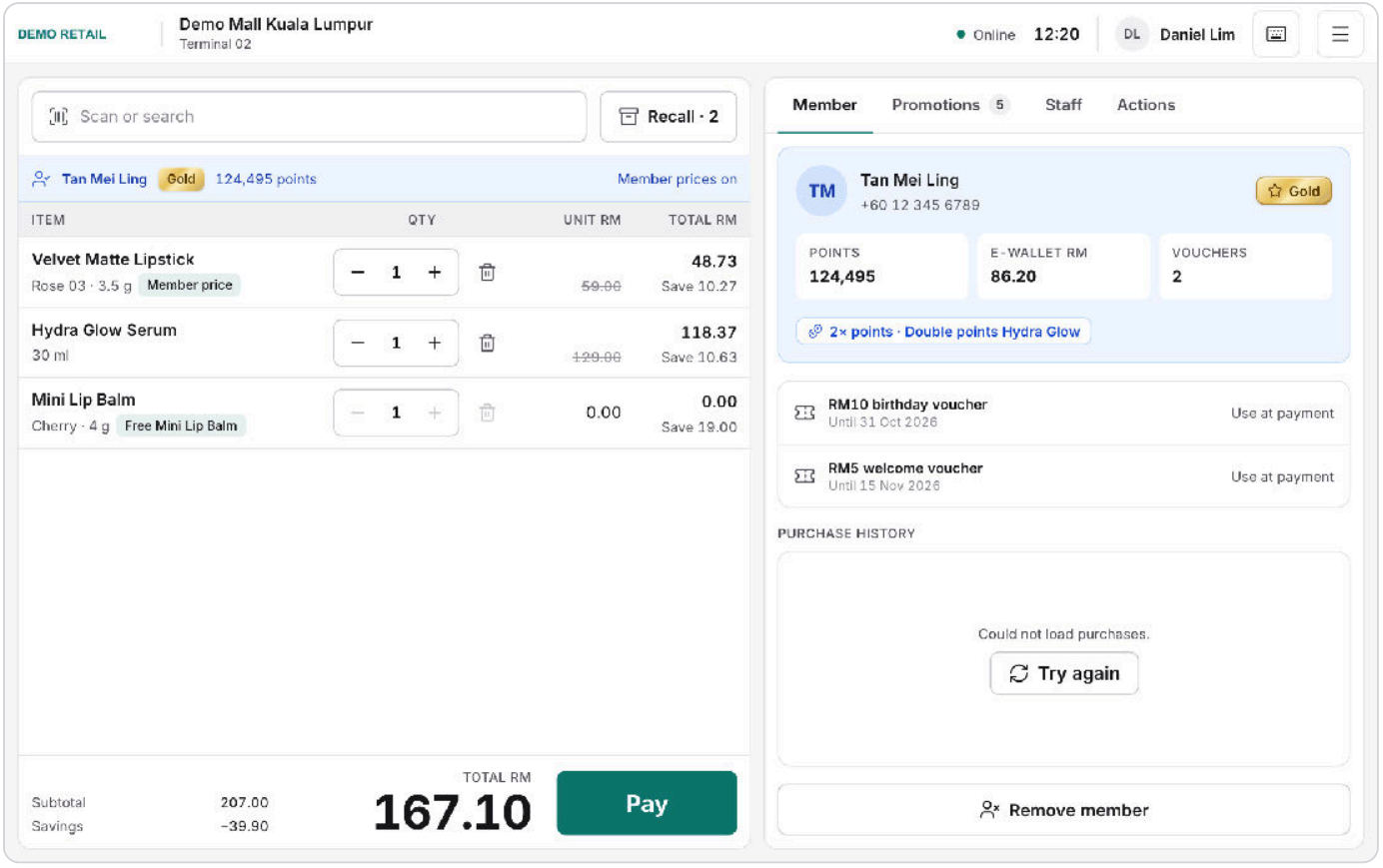
If a yellow banner says an earlier day's drawer is still open, close that day first (see Close the day).

Make a sale

For: Beauty advisors

Scan the items and add the member

1. Scan each product's barcode, or type its name in **Scan or search**.
2. Change the quantity with **+** and **−** on the line. The bin button removes the line. After a payment has been taken, removing a line is a void and asks for a reason.
3. If the customer is a member, open the **Member** tab. Scan their member QR code, type their member card number, or type their phone number and press **Find**.
4. Use the **Staff** tab to pick the sales person for the whole sale. Staff from other outlets show as **Not in this outlet** but can still be picked.
5. Member prices, promotions and free gifts are added by themselves. The saving shows under each line.



The **Promotions** tab shows which offers apply to this basket. When a deal needs more items, its reminder names them and its button adds the missing quantity.

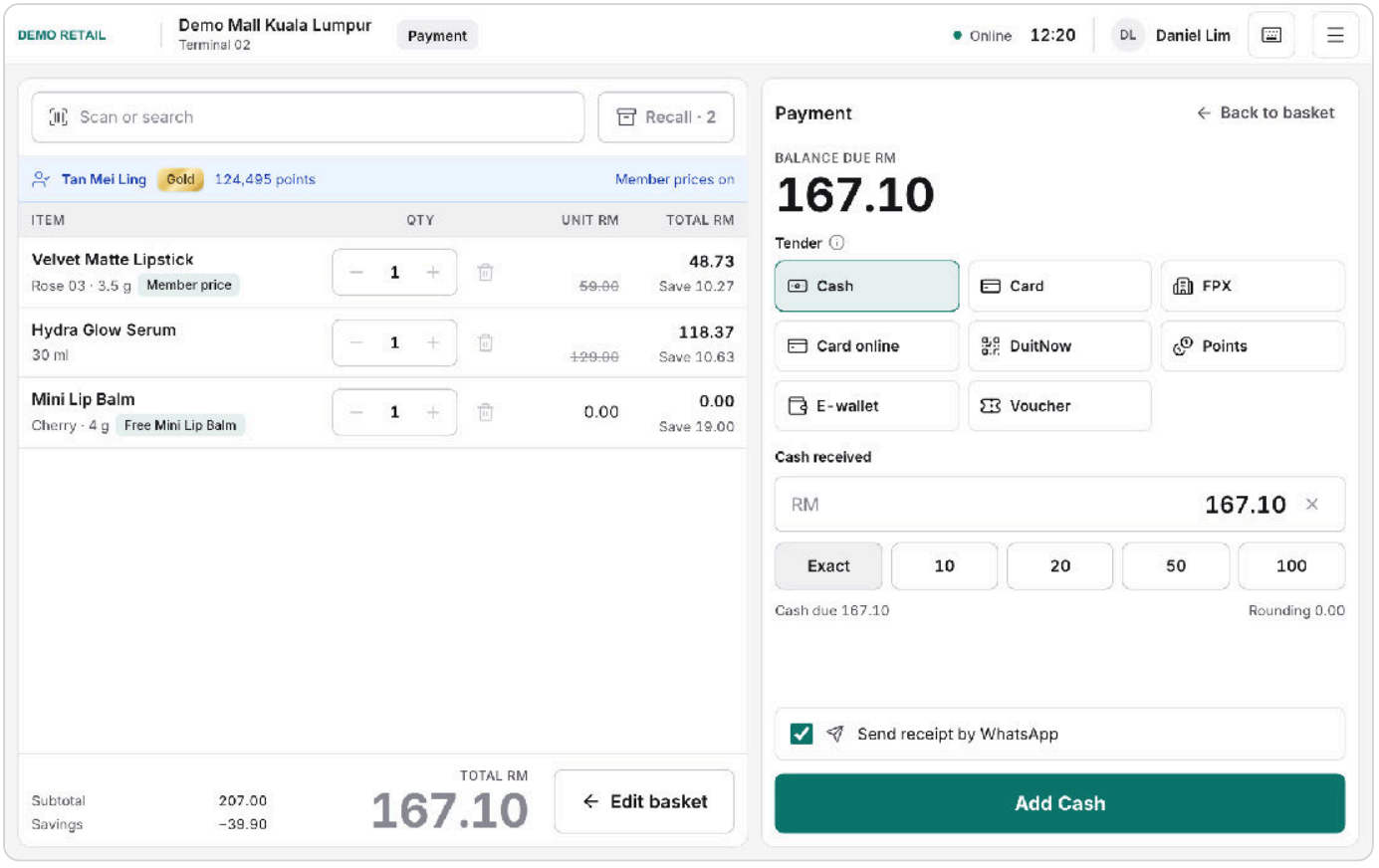
Give a discount on the whole receipt

1. Press **Receipt discount**.
2. Choose a percentage or a fixed amount off, and pick a reason. If the reason is **Other**, type a short note.
3. The discount shows as its own line under the totals. Press the small red × beside it to remove it.

Above your role's limit, a store manager must approve. Adding a receipt discount after a payment has been taken always needs a manager.

Take payment

1. Press **Pay**.
2. Choose how the customer pays: **Cash**, **Card** (the bank's card machine), **FPX**, **Card online**, **DuitNow**, **Points**, **E-wallet** or **Voucher**.
3. For cash, type the amount received or press **Exact**, **10**, **20**, **50** or **100**, then press **Add Cash**.
4. Paying with more than one method? Add each one until the balance due is 0.
5. The sale completes by itself once it is paid in full.

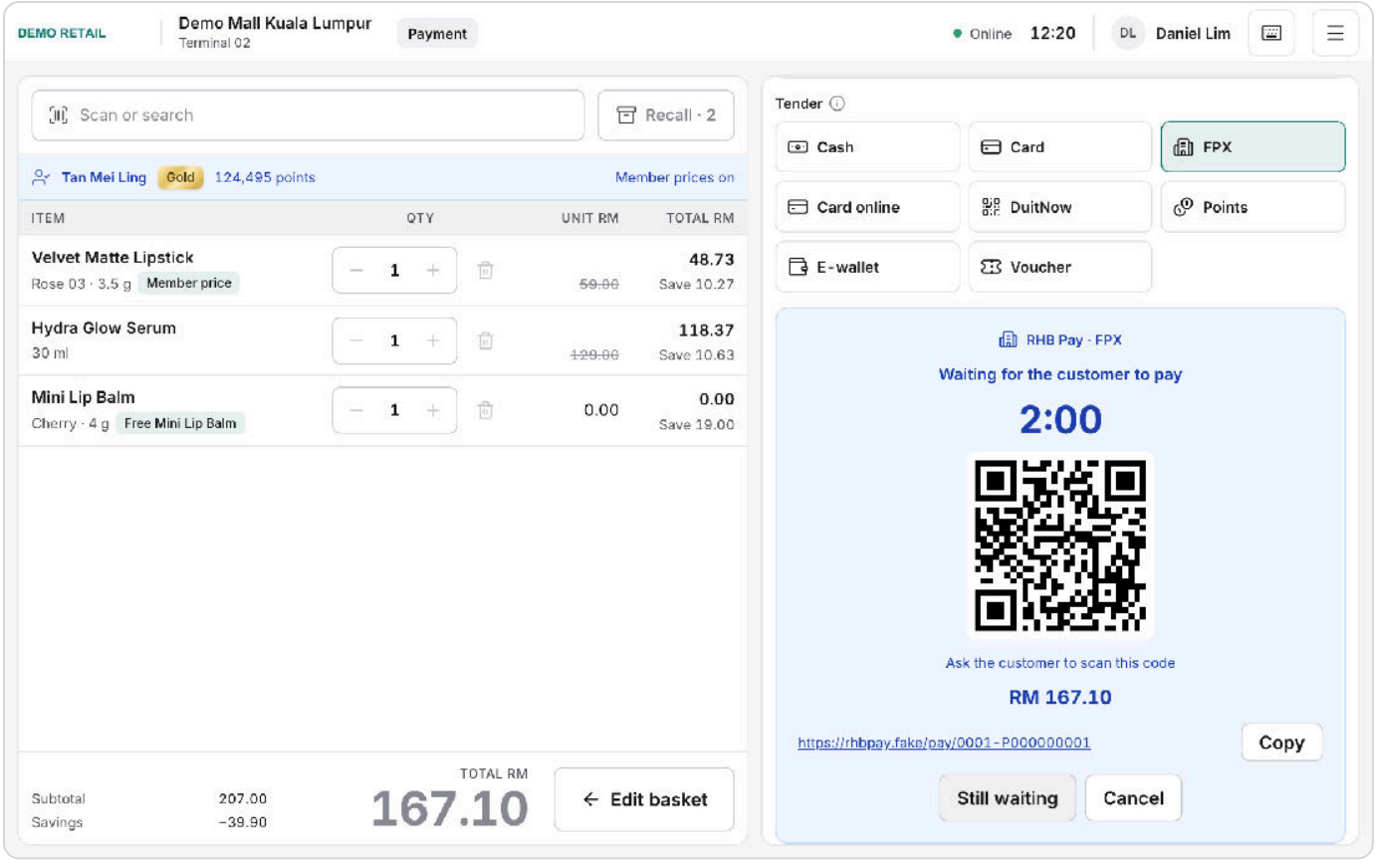


Need to change the basket? Press **Edit basket** or **Back to basket** before the sale completes.

FPX, Card online and DuitNow

These go through RHB Pay: the customer pays on their own phone.

1. Press **FPX**, **Card online** or **DuitNow**. The amount is set to the balance due; lower it if the customer pays only part this way.
2. Press **Show QR**. The code appears on the customer display, or on the till screen when there is no customer display.
3. The customer scans the code and pays. The till counts down from 2 minutes. Press **Still waiting** for 2 more minutes, or **Cancel** to choose another method.
4. When the payment arrives, the line turns green and shows the bank's reference.

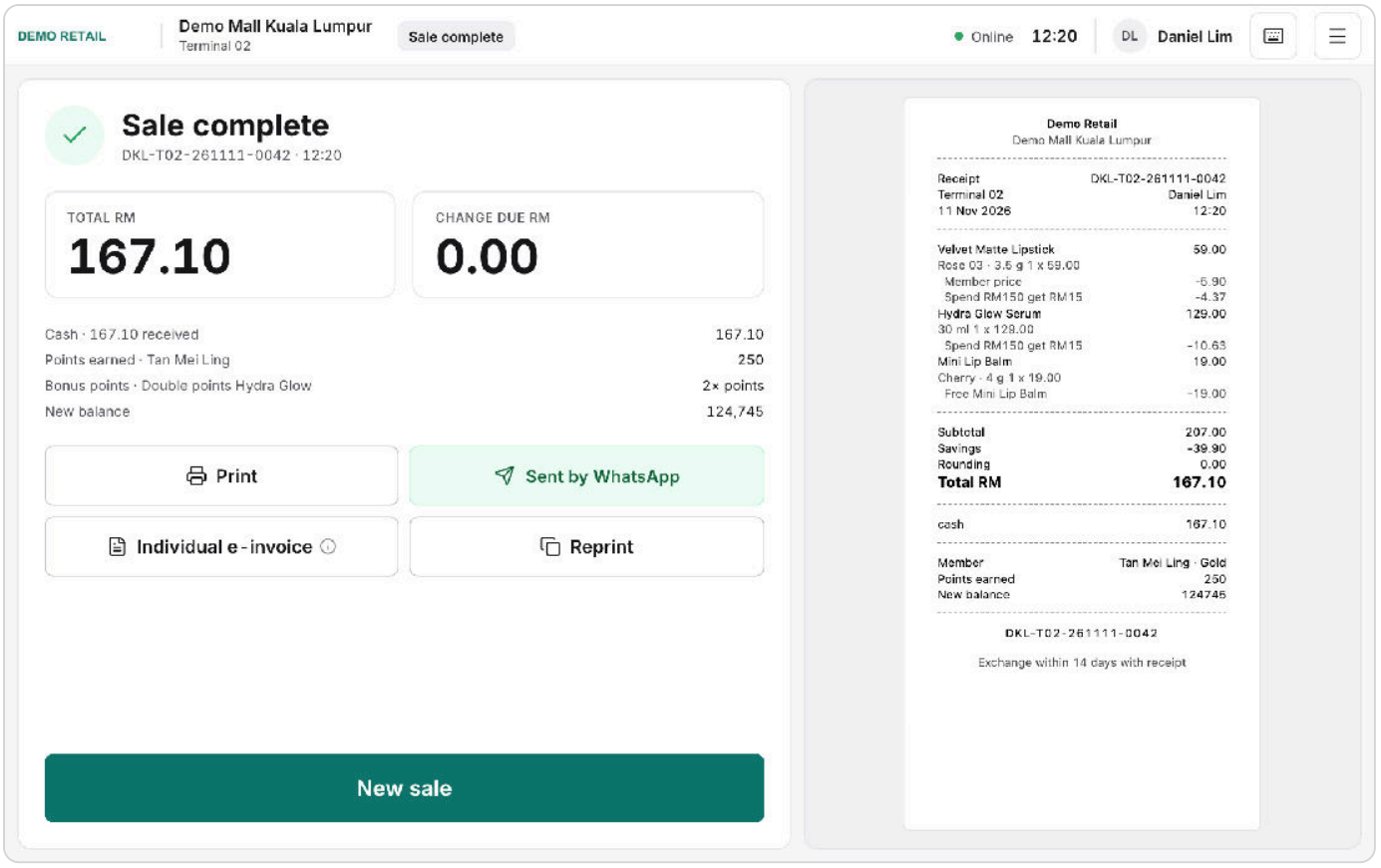


A paid RHB Pay payment cannot be removed from the basket; voiding that basket needs a manager's approval.

Give the receipt

1. The screen shows the total and the change to give back. The receipt prints.

2. Press **Print** or **Reprint** for another copy. A receipt can also go to a member by WhatsApp.
3. If the customer asks for an e-invoice, press **Individual e-invoice**.
4. Press **New sale** for the next customer.



Till keyboard shortcuts

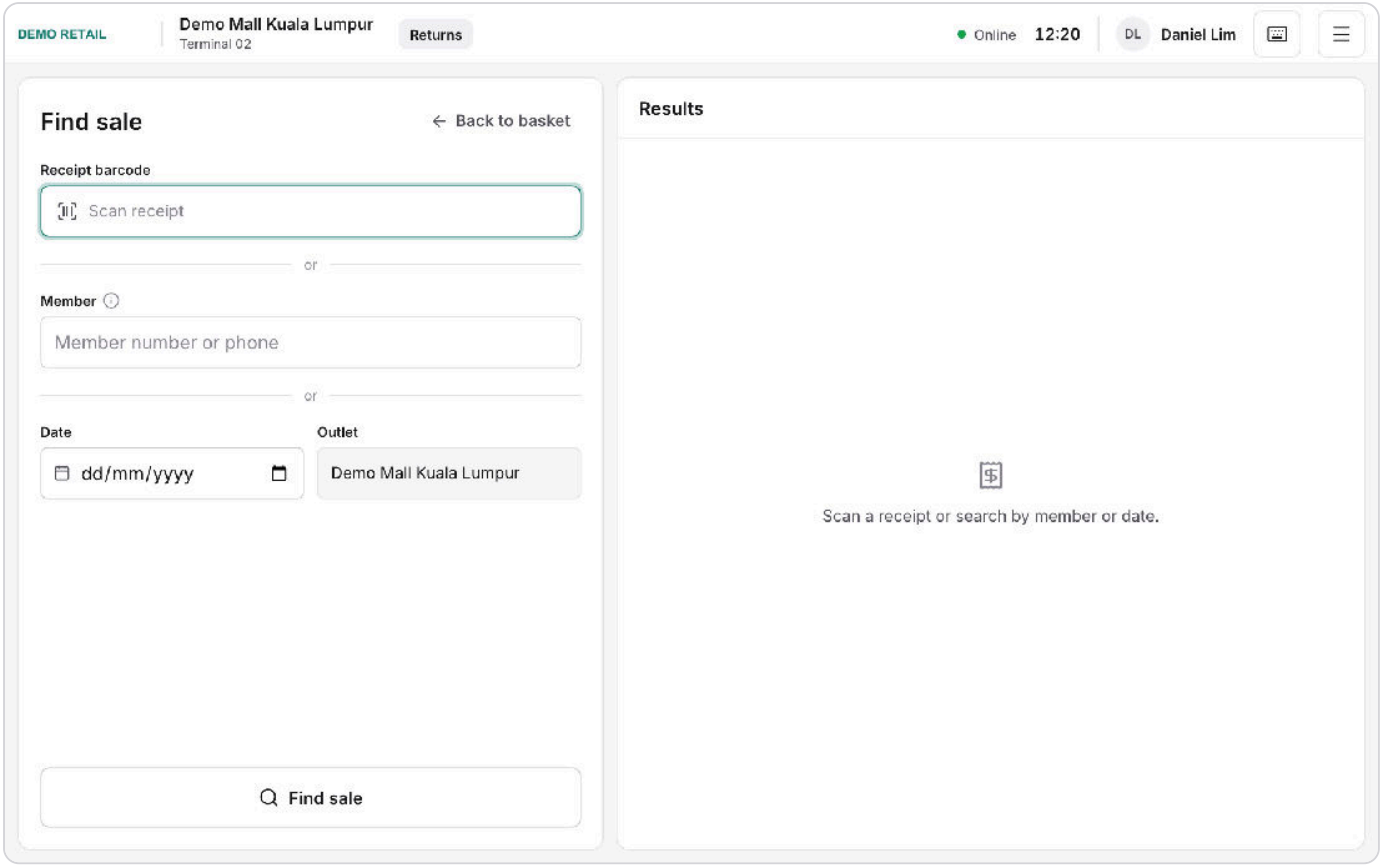
Key	What it does
F1	Show all keyboard shortcuts
F2	Member tab
F3	Scan or search box
F4	Suspend: put the basket on hold
F5	Recall: bring back a basket on hold
F6	Returns
F7	Drawer
F8	Void the whole basket
F12	Lock the till when you step away

RETAIL POS

Return or exchange an item

For: Beauty advisors, Store managers

1. Press the menu button (≡) at the top right of the till, then **Returns**.
2. Find the original sale: scan the receipt barcode, or search by member number, phone or date. Press **Find sale**.
3. Pick the items coming back and follow the screen.
4. The refund goes back the way the customer paid. Money paid through RHB Pay (FPX, Card online, DuitNow) is refunded in cash from the drawer.

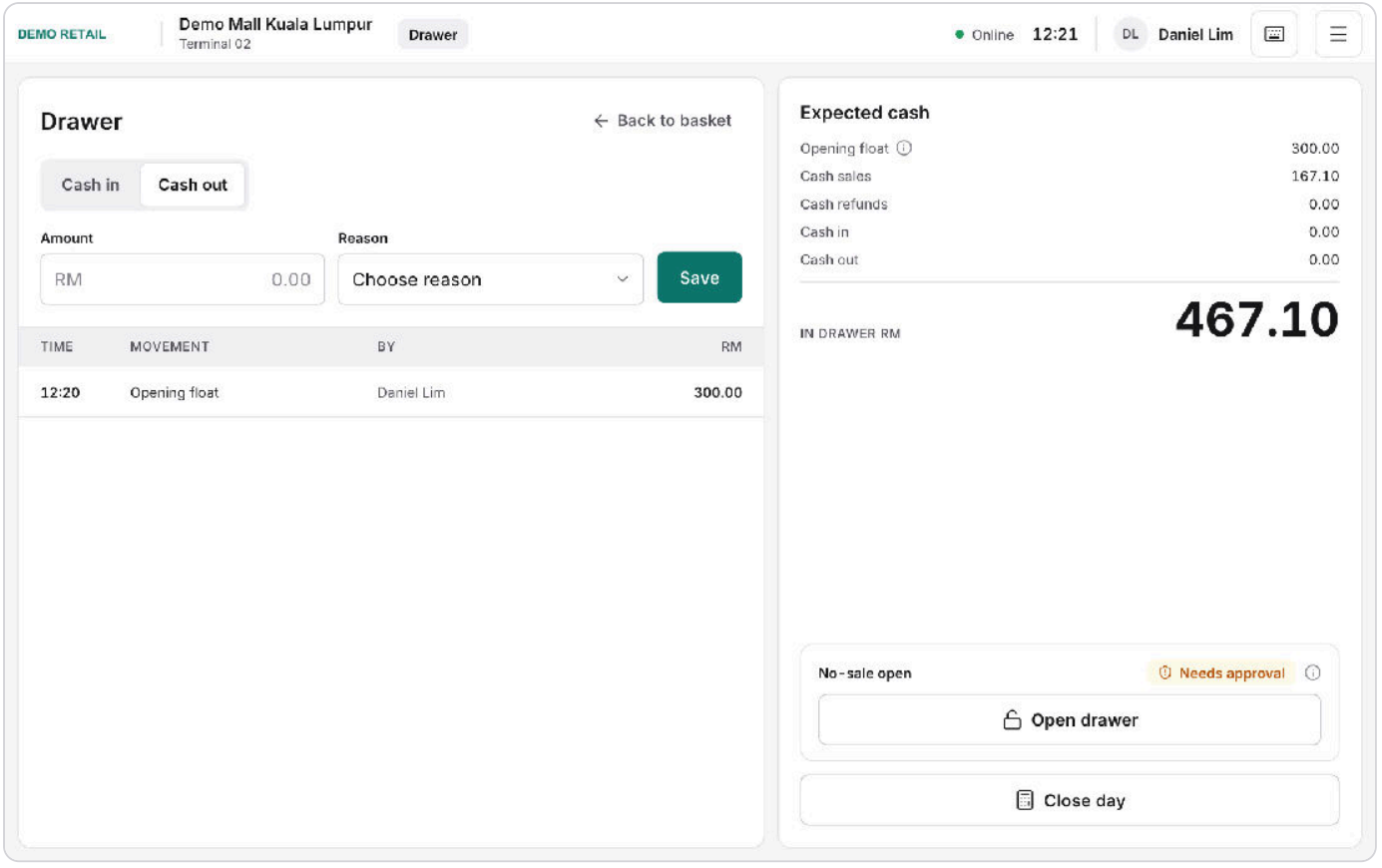


Refunds above your role's limit need a store manager to approve on the till.

Put cash in or take cash out

For: Beauty advisors, Store managers

1. Press the menu button (≡) at the top right of the till, then **Drawer**.
2. Choose **Cash in** or **Cash out**, type the **Amount**, choose a **Reason** and press **Save**.
3. **Expected cash** on the right shows how much should be in the drawer right now.

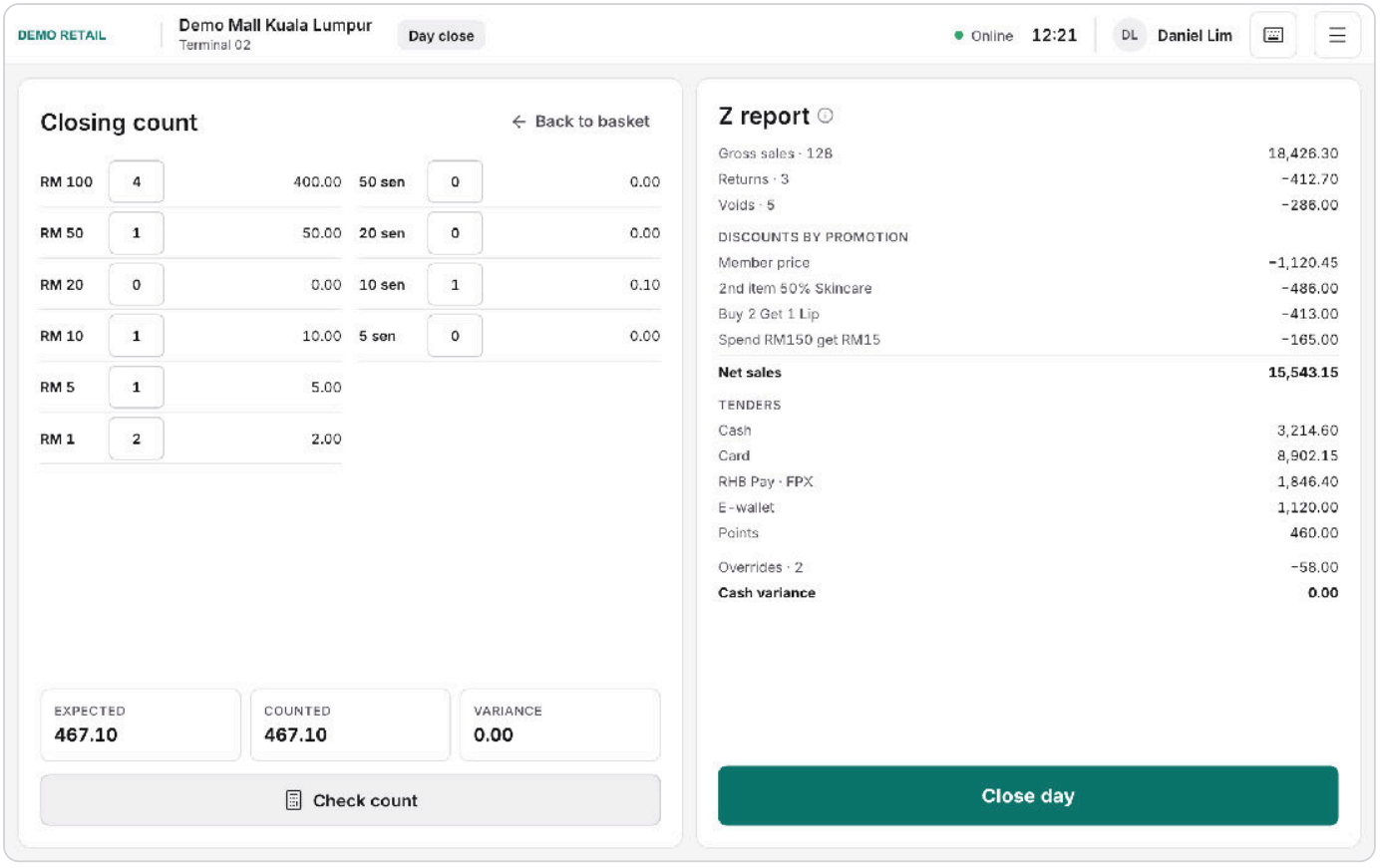


Opening the drawer without a sale (**No-sale open**) needs a manager's approval.

Close the day

For: Store managers

1. At closing time, open **Drawer** and press **Close day**.
2. Count every note and coin in the drawer and type how many of each under **Closing count**.
3. Press **Check count**. **Variance** shows any difference between the cash expected and the cash counted.
4. The Z report (the end-of-day summary) appears on the right. Press **Close day** to finish. The Z report prints.

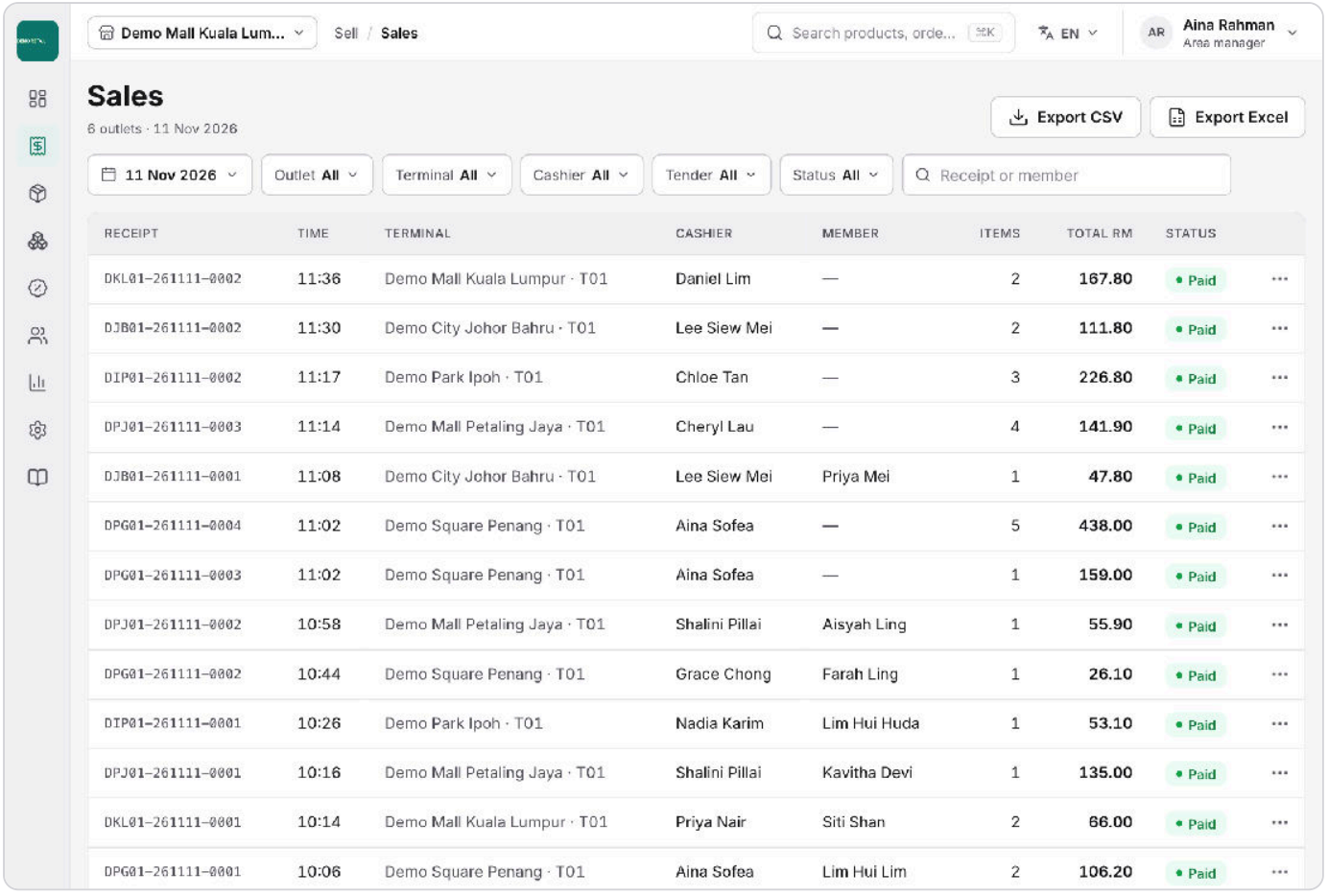


RETAIL POS

Find a past sale

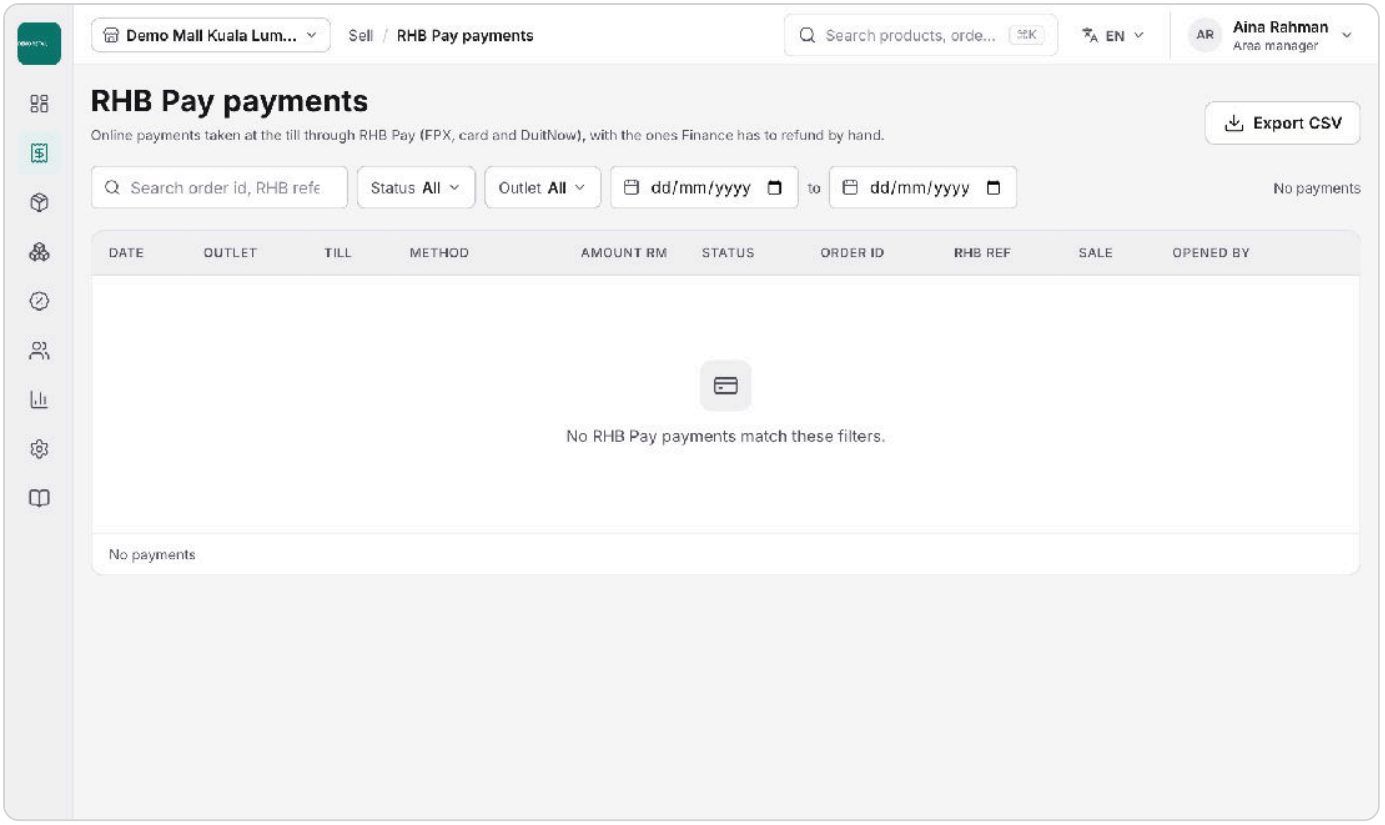
For: Store managers, Finance

1. In the menu, open **Sell**, then **Sales**.
2. Pick the date and narrow the list by **Outlet**, **Terminal**, **Cashier**, **Tender** (how it was paid) or **Status**, or search by receipt or member.
3. Click a sale to see its items, payments and receipt.
4. Press **Export CSV** or **Export Excel** to download the list.



RHB Pay payments

Sell, then **RHB Pay payments** lists every FPX, Card online and DuitNow payment with its status, bank reference and sale. Payments that need attention, such as one paid after the cashier cancelled or one for a different amount, sit at the top. Refund the customer through RHB, then mark it refunded here.

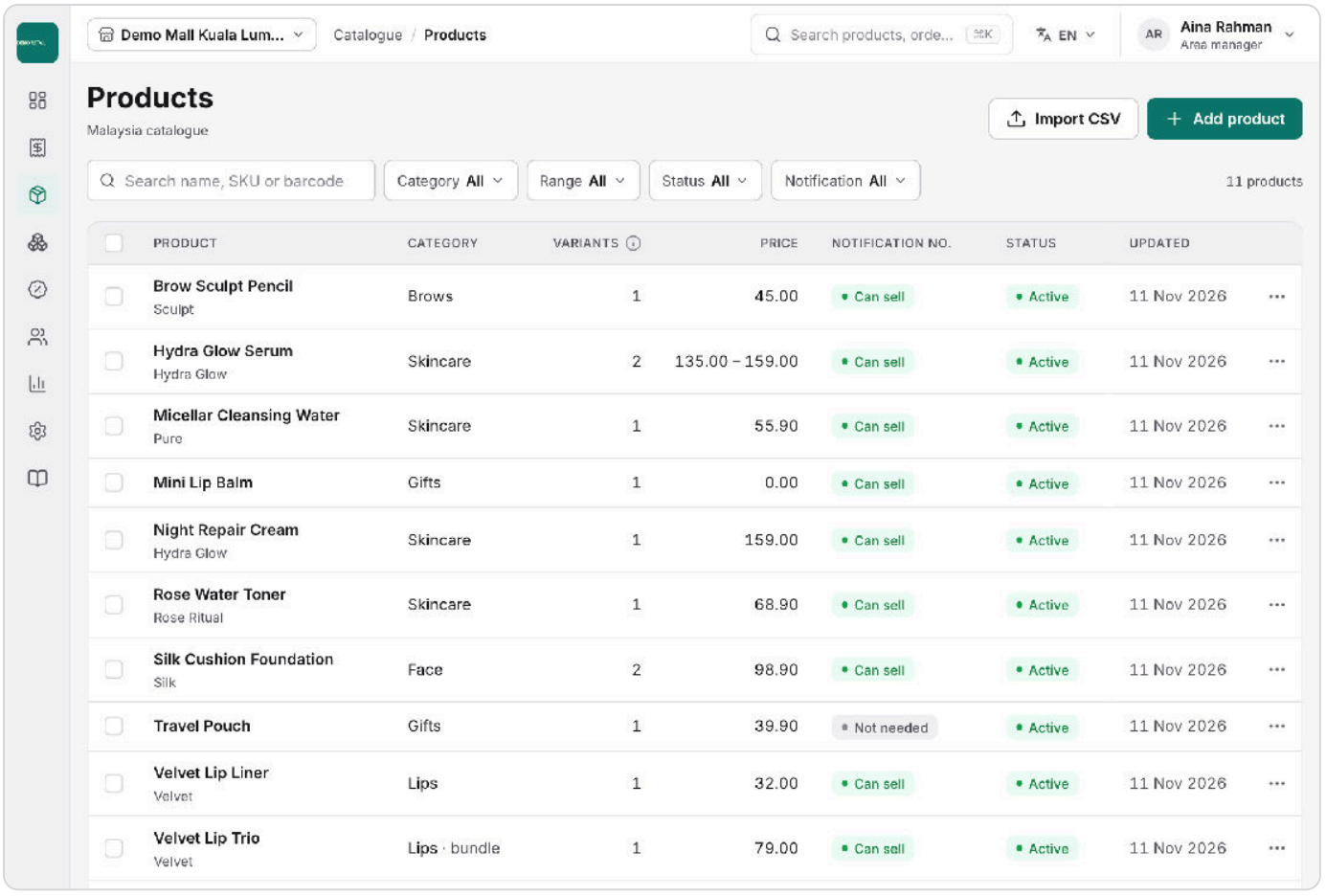

Demo Mall Kuala Lum...
Sell / RHB Pay payments
Search products, orde...
EN
AR
Aina Rahman
Area manager
RHB Pay payments
Online payments taken at the till through RHB Pay (FPX, card and DuitNow), with the ones Finance has to refund by hand.
Export CSV
Search order id, RHB refe
Status All
Outlet All
dd/mm/yyyy
to
dd/mm/yyyy
No payments
DATE
OUTLET
TILL
METHOD
AMOUNT RM
STATUS
ORDER ID
RHB REF
SALE
OPENED BY
No RHB Pay payments match these filters.
No payments

Products and prices

For: Merchandising

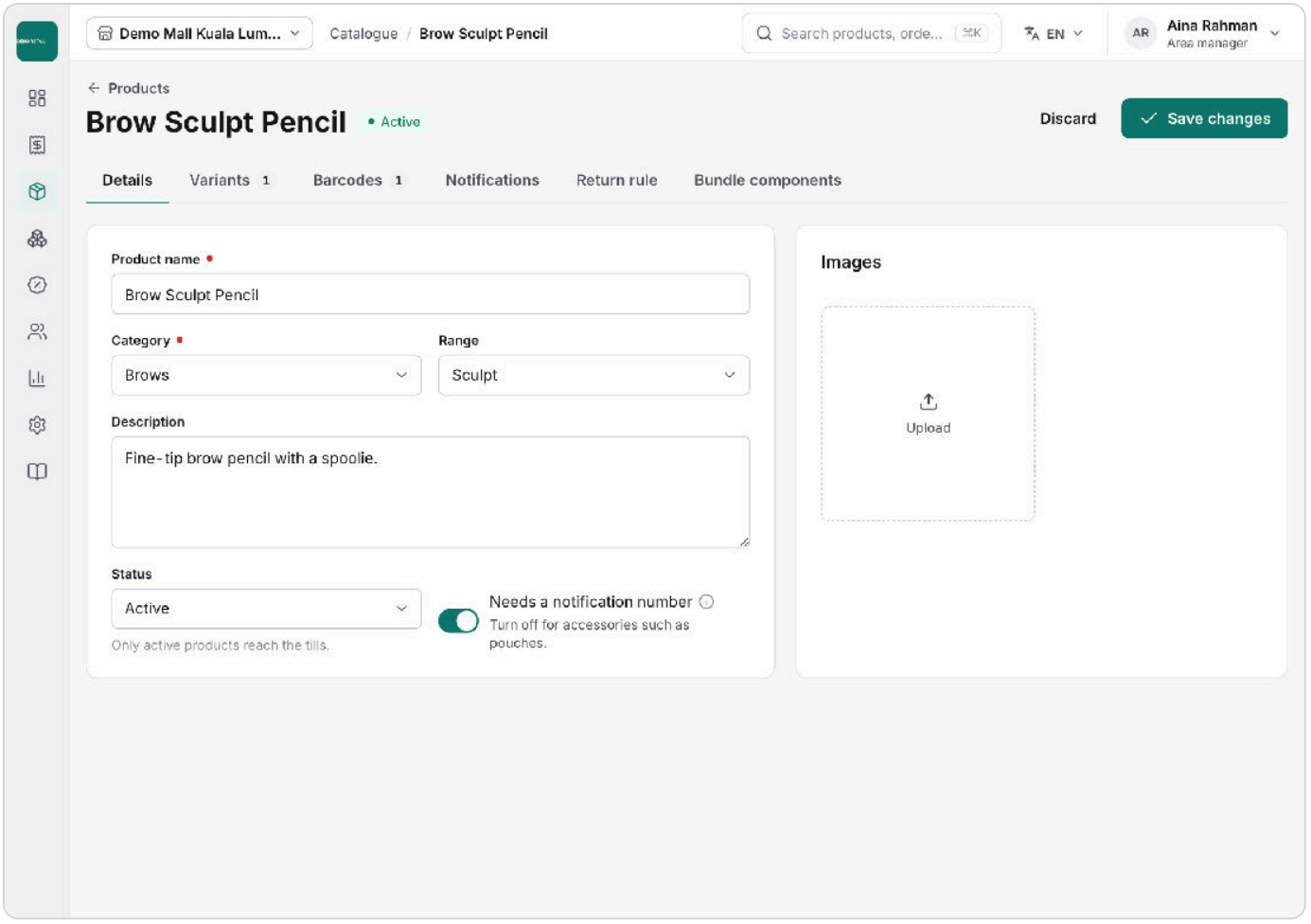
Find a product

1. Open **Catalogue**, then **Products**.
2. Search by name, SKU (the product code) or barcode, or narrow the list with **Category**, **Range**, **Status** and **Notification**.
3. Press **Add product** to create one, or **Import CSV** to add many at once.



Change a product

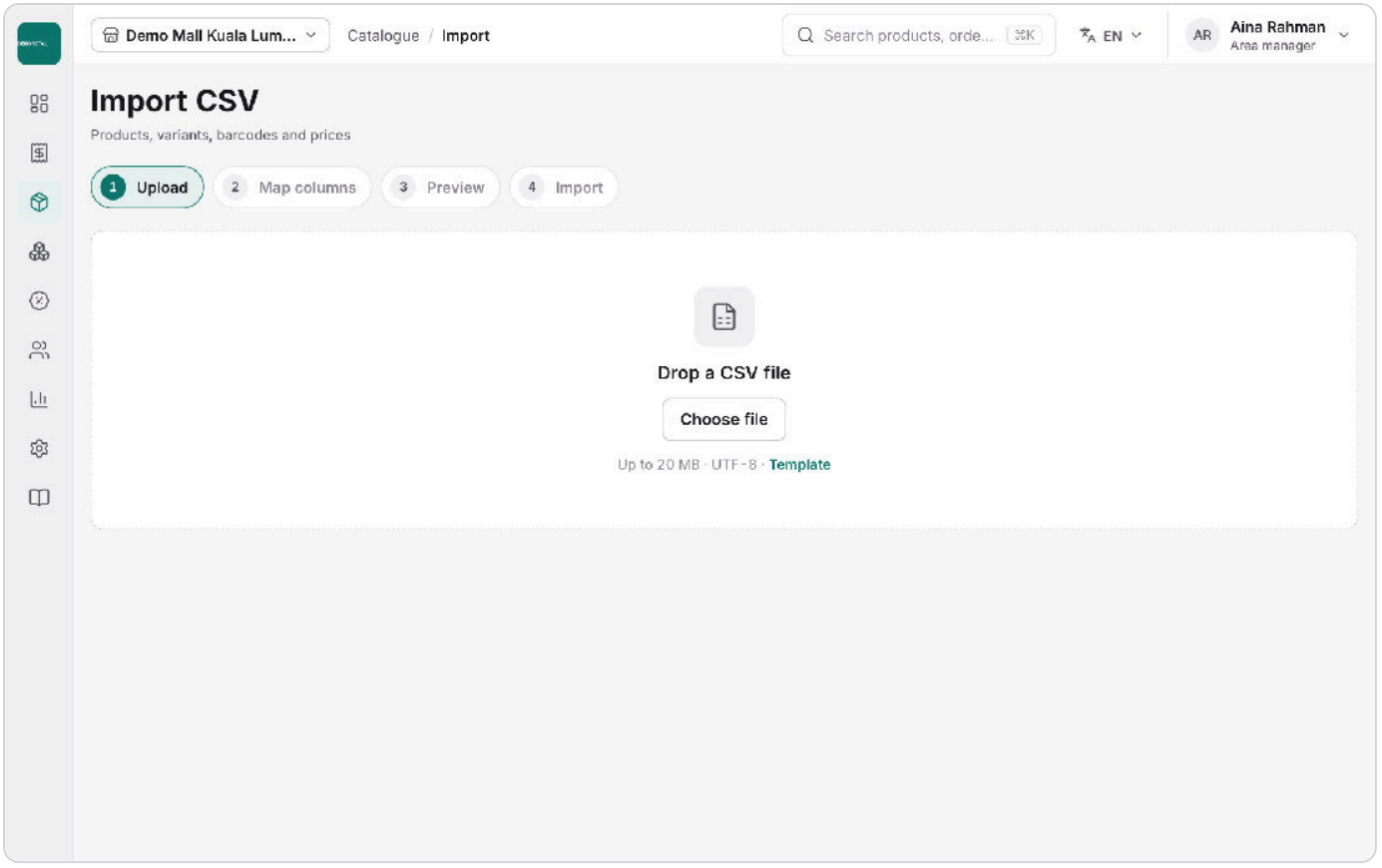
1. Click a product in the list to open it.
2. Use the tabs for its **Details**, **Variants** (shades and sizes), **Barcodes**, **Notifications** (cosmetic notification numbers), **Return rule** and **Bundle components**.
3. Make your change and press **Save changes**, or **Discard** to undo.



Only products with the status **Active** reach the tills.

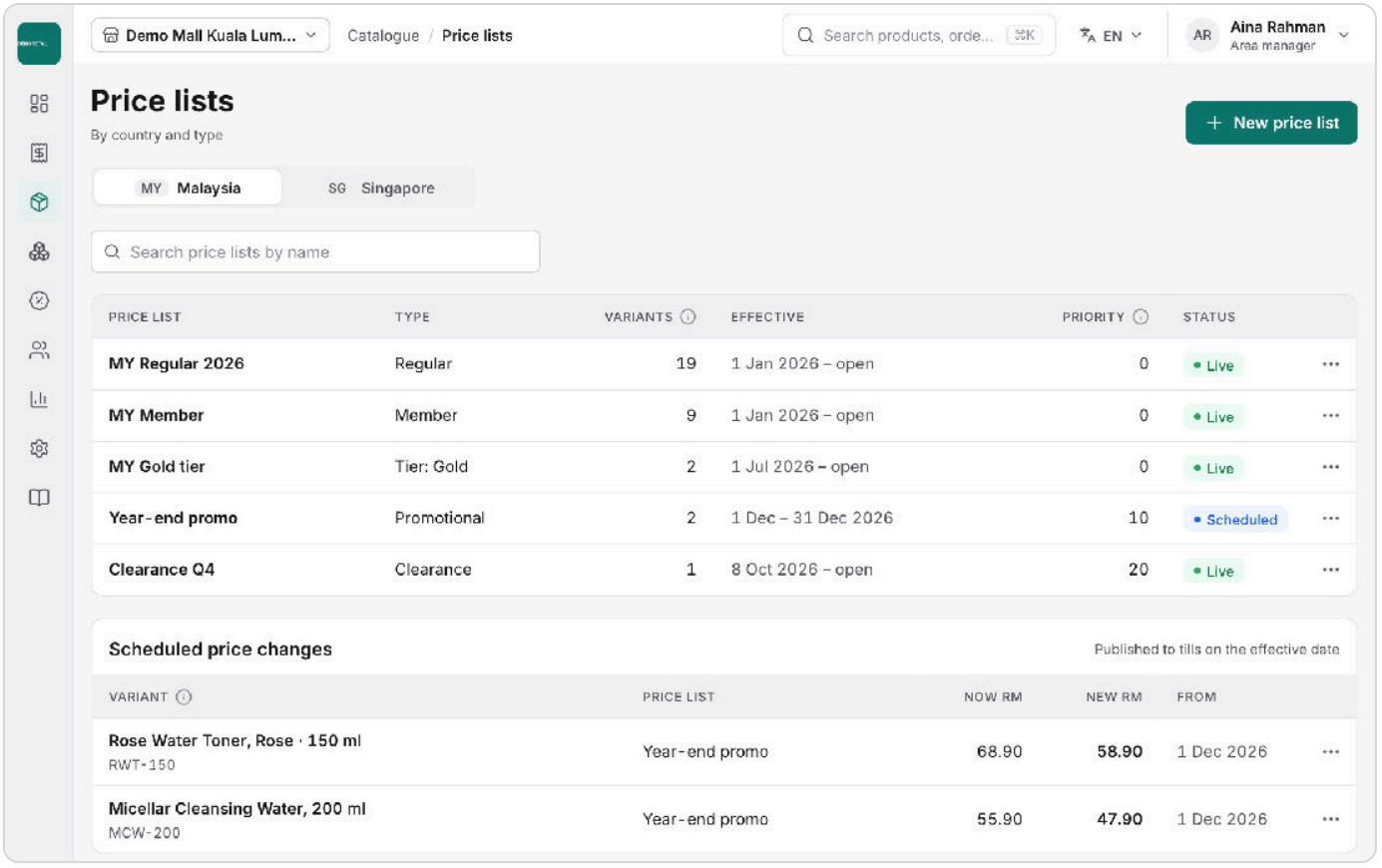
Import many products from a spreadsheet

1. Open **Catalogue**, then **Import**.
2. Download the **Template**, fill it in and save it as CSV.
3. Drop the file on the page or press **Choose file**, then follow the four steps: **Upload**, **Map columns**, **Preview**, **Import**.



Price lists

1. Open **Catalogue**, then **Price lists**, to see each price list, when it starts and whether it is live.
2. Press **New price list** to add one.
3. Price changes with a future date are listed under **Scheduled price changes** and reach the tills on that date.


Demo Mall Kuala Lum...
Catalogue / Price lists
Search products, orde... ⌘K
EN
AR
Aina Rahman
Area manager
Price lists
By country and type
+ New price list
MY Malaysia
SG Singapore
Search price lists by name
PRICE LIST
TYPE
VARIANTS
EFFECTIVE
PRIORITY
STATUS
MY Regular 2026
Regular
19
1 Jan 2026 – open
0
Live
MY Member
Member
9
1 Jan 2026 – open
0
Live
MY Gold tier
Tier: Gold
2
1 Jul 2026 – open
0
Live
Year-end promo
Promotional
2
1 Dec – 31 Dec 2026
10
Scheduled
Clearance Q4
Clearance
1
8 Oct 2026 – open
20
Live
Scheduled price changes
Published to tills on the effective date
VARIANT
PRICE LIST
NOW RM
NEW RM
FROM
Rose Water Toner, Rose · 150 ml
RWT-150
Year-end promo
68.90
58.90
1 Dec 2026
Micellar Cleansing Water, 200 ml
MCW-200
Year-end promo
55.90
47.90
1 Dec 2026

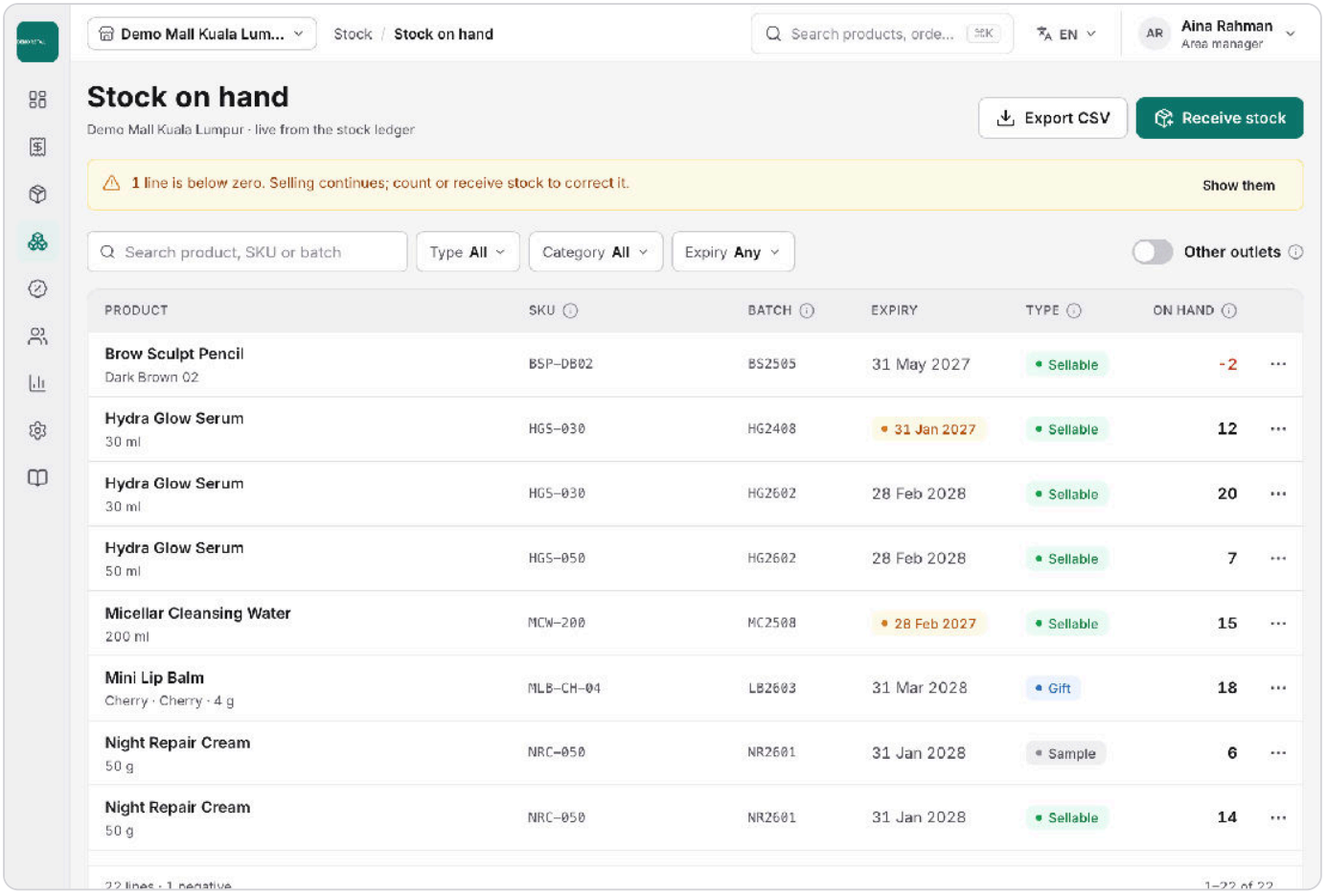
Look after stock

For: Store managers

Stock pages always work on the outlet chosen at the top left.

See what is in stock

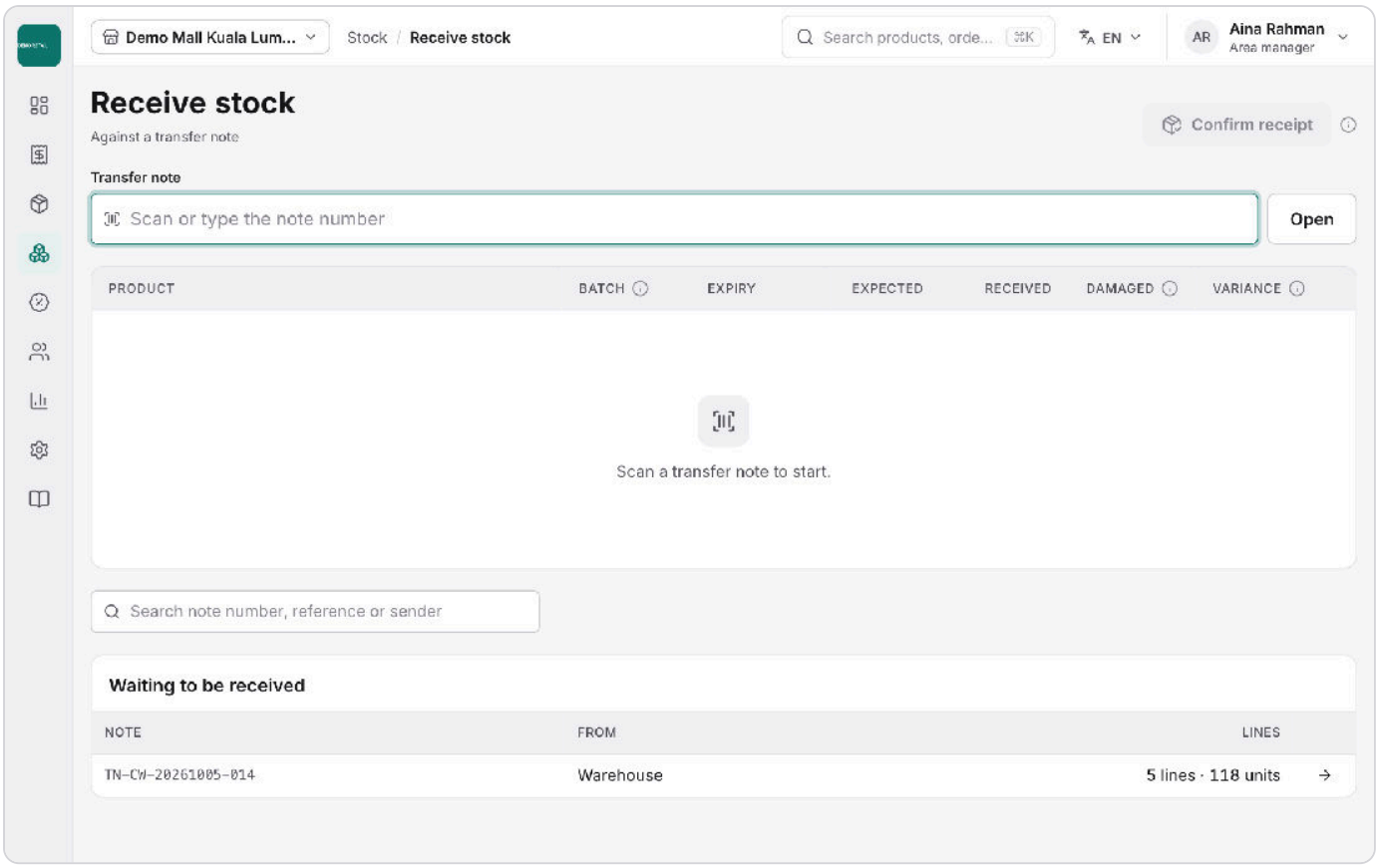
Open **Stock**, then **Stock on hand**. Filter by **Type** (sellable, tester, sample, gift), **Category** or **Expiry**, and press **Export CSV** to download. A yellow banner warns when a line is below zero; selling continues, and counting or receiving stock corrects it.



Receive a delivery

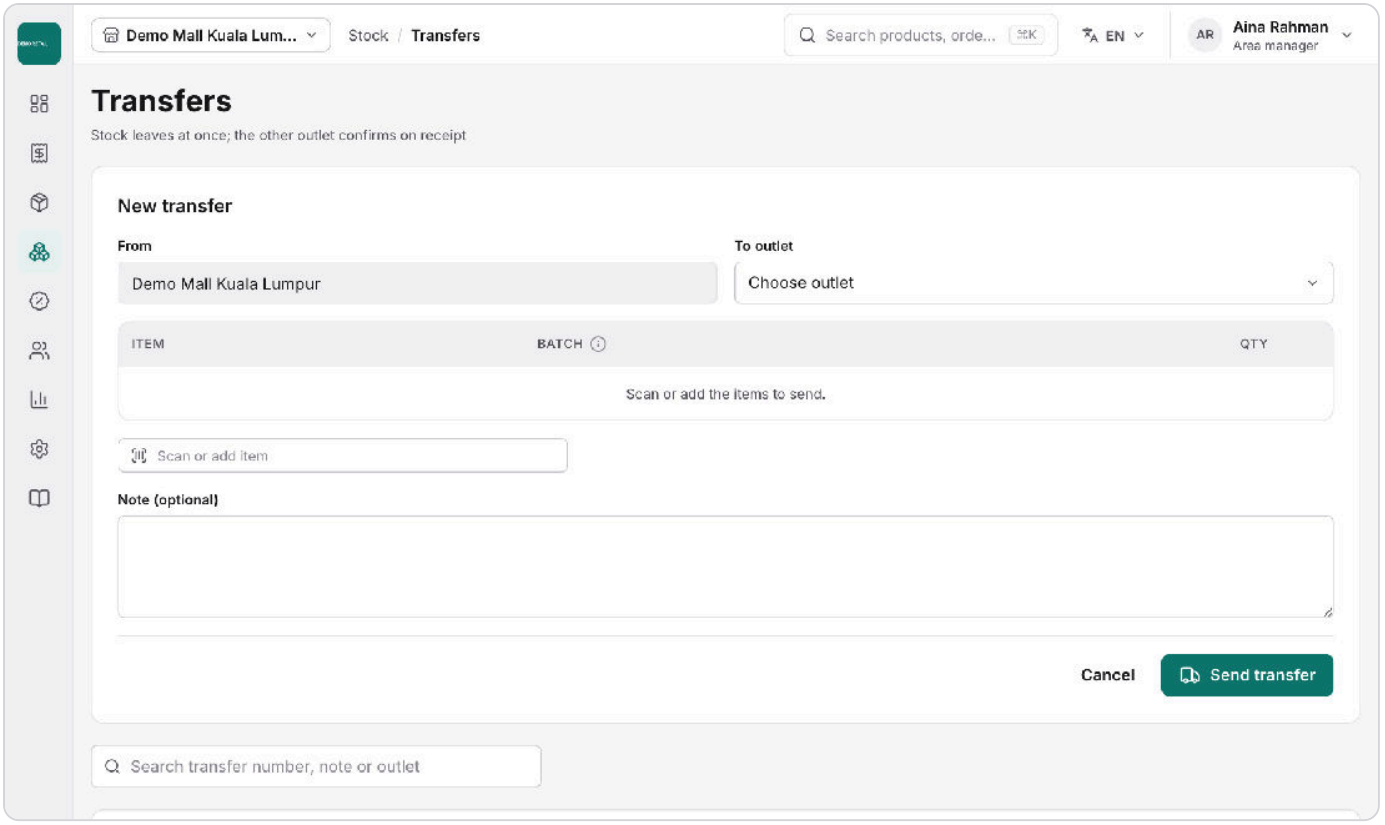
1. Open **Stock**, then **Receive stock**.
2. Scan or type the transfer note number and press **Open**. Deliveries on their way are listed under **Waiting to be received**.
3. For each line, type the quantity you received and any damaged units. **Variance** shows anything missing, extra or damaged.

4. When a line does not add up, pick the reason and add a note if it helps. **Confirm receipt** stays off until every short or extra line has a reason.
5. Press **Confirm receipt**.



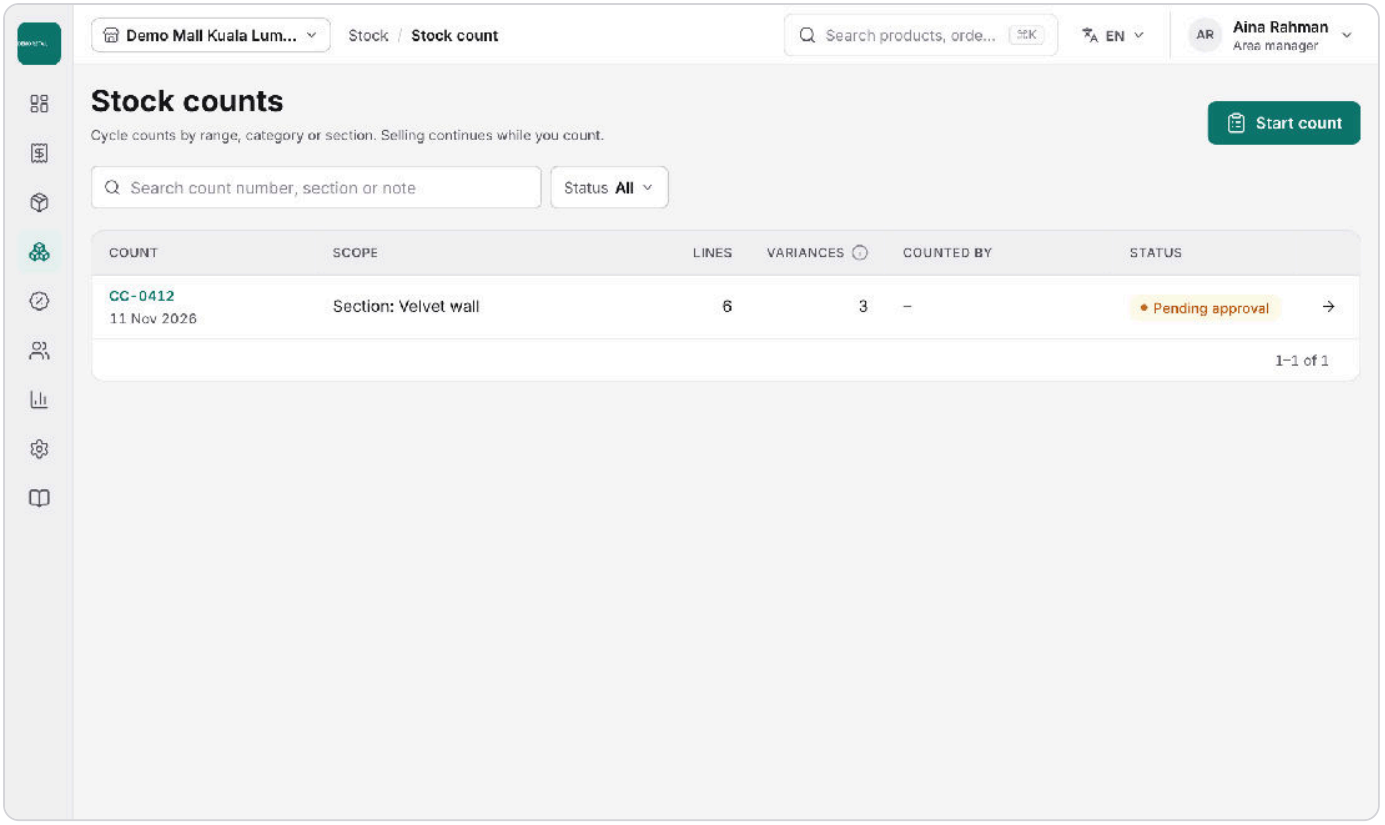
Send stock to another outlet

1. Open **Stock**, then **Transfers**.
2. Under **New transfer**, choose the outlet it goes **To**, scan or add the items and quantities, then press **Send transfer**.
3. The stock leaves your outlet straight away. The other outlet confirms it when it arrives.



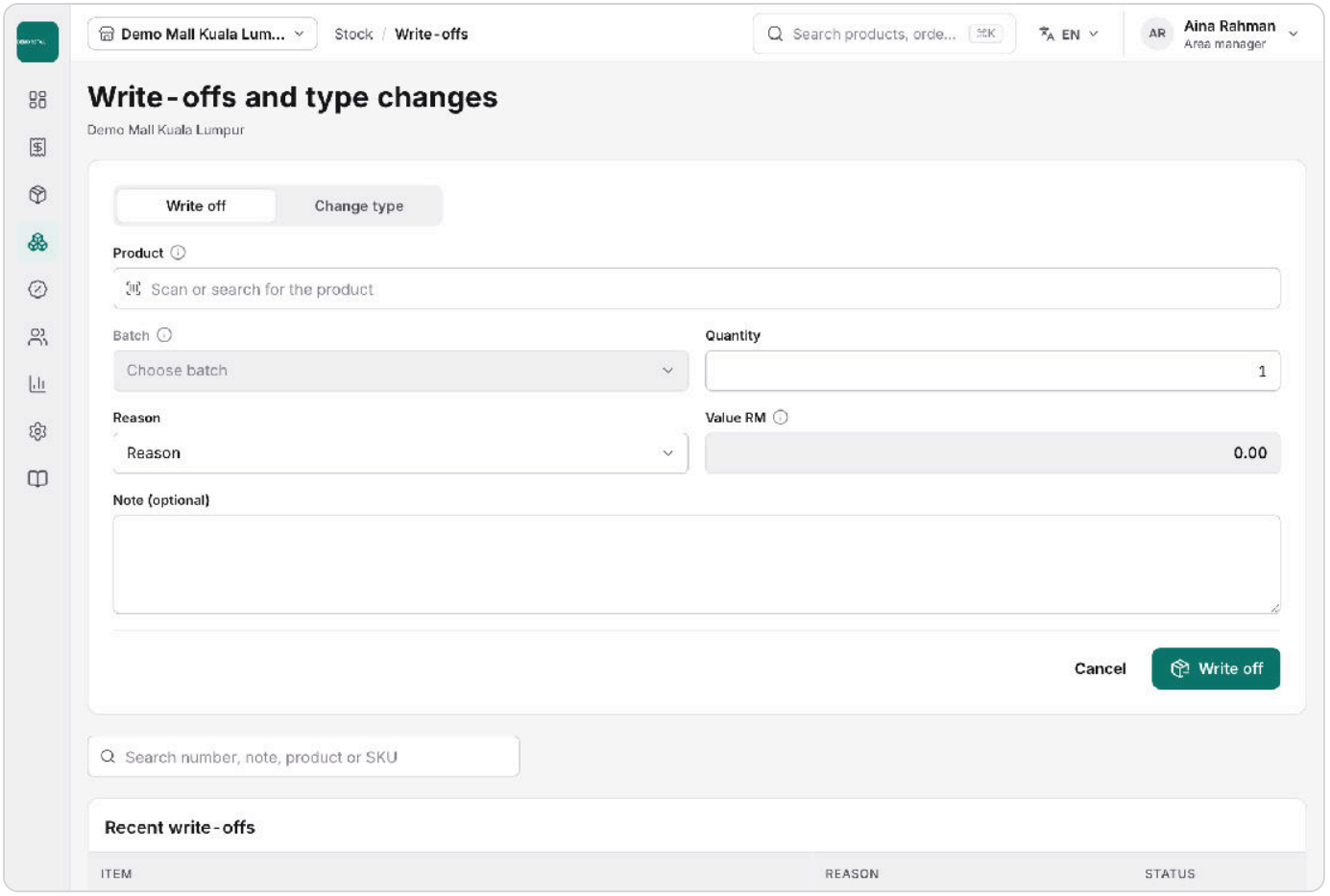
Count stock

1. Open **Stock**, then **Stock count**, and press **Start count**.
2. Count by range, category or shelf section. You can keep selling while you count.
3. When you finish, a manager approves the count and the stock figures are updated.



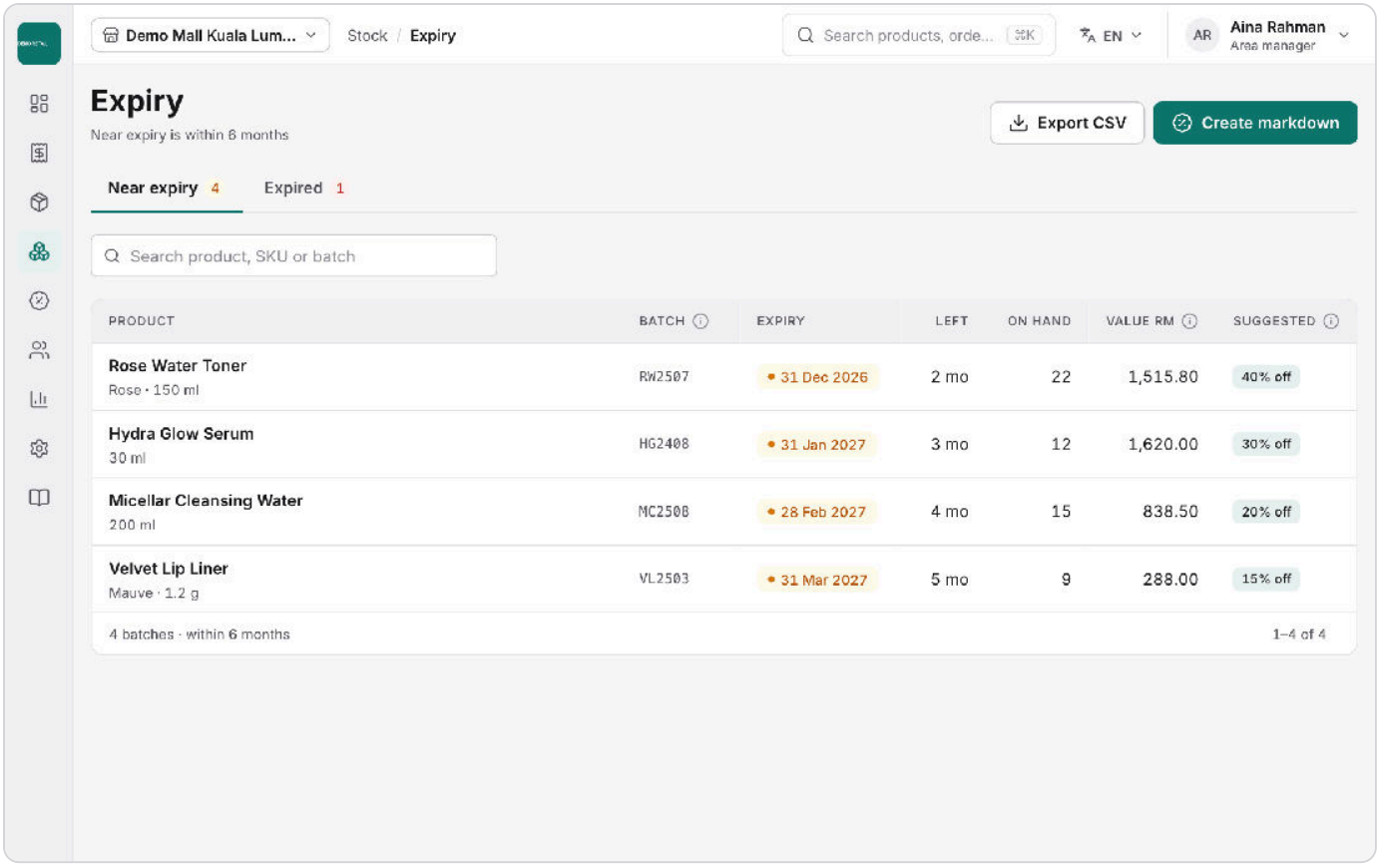
Write off damaged or expired stock

1. Open **Stock**, then **Write-offs**.
2. Choose the product, batch and quantity, and the reason: damaged, expired, used as a tester, used for samples, theft or loss, or other.
3. Add a note if needed and press **Write off**.
4. Use **Change type** to move stock between sellable, tester, sample and gift.



Check expiry dates

Open **Stock**, then **Expiry**, to see stock that expires within 6 months (**Near expiry**) and stock already **Expired**. Press **Create markdown** to put a discount on items close to expiry.


Demo Mall Kuala Lum...
Stock / Expiry
Search products, orde... ⌘K
EN
AR
Aina Rahman
Area manager
Expiry
Near expiry is within 6 months
Export CSV
Create markdown
Near expiry 4
Expired 1
Search product, SKU or batch
PRODUCT
BATCH
EXPIRY
LEFT
ON HAND
VALUE RM
SUGGESTED
Rose Water Toner
Rose · 150 ml
RW2507
31 Dec 2026
2 mo
22
1,515.80
40% off
Hydra Glow Serum
30 ml
HG2408
31 Jan 2027
3 mo
12
1,620.00
30% off
Micellar Cleansing Water
200 ml
MC2508
28 Feb 2027
4 mo
15
838.50
20% off
Velvet Lip Liner
Mauve · 1.2 g
VL2503
31 Mar 2027
5 mo
9
288.00
15% off
4 batches · within 6 months
1–4 of 4

RETAIL POS

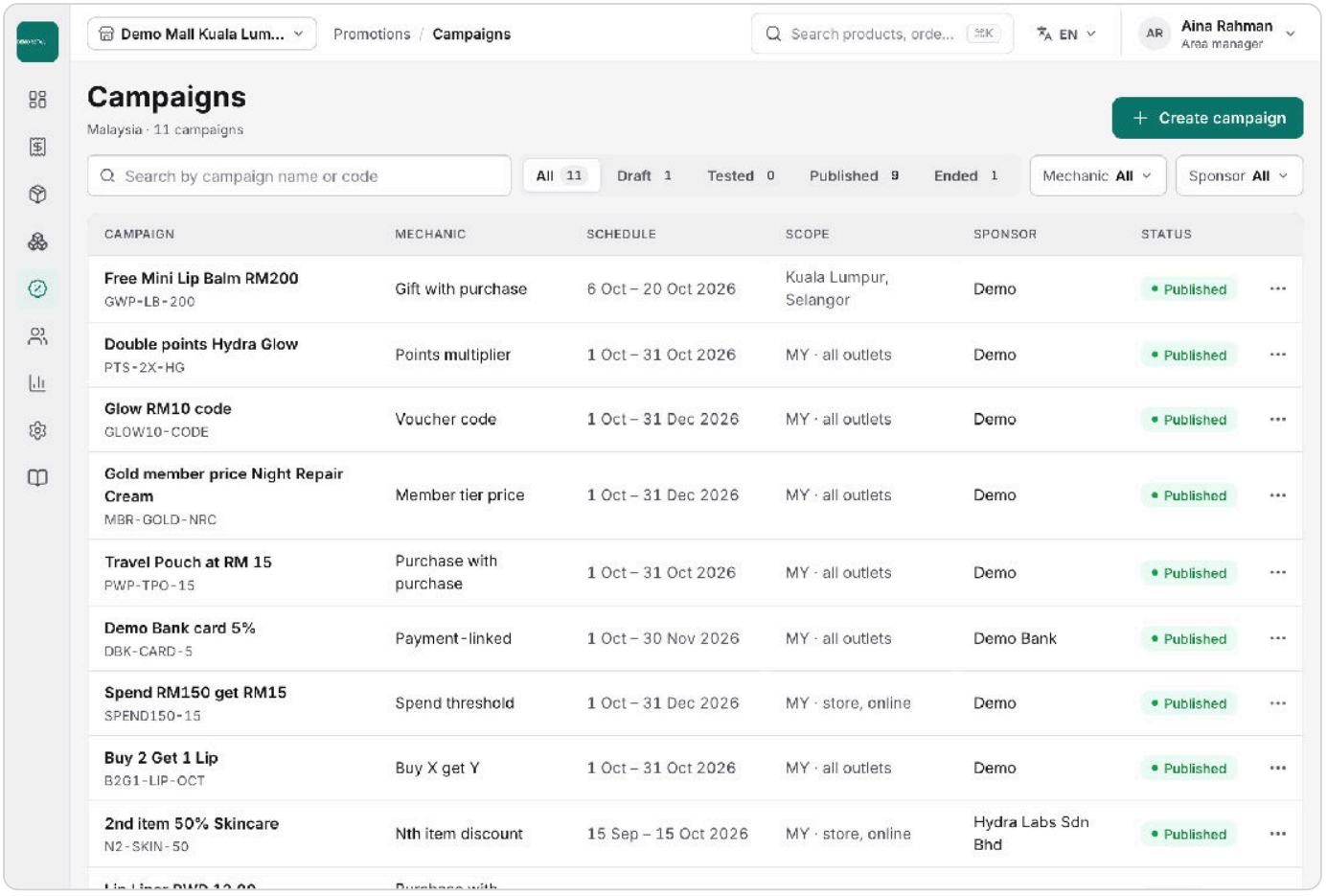
Run a promotion

For: Merchandising

Discounts, free gifts and voucher codes are applied by the tills on their own.

See all campaigns

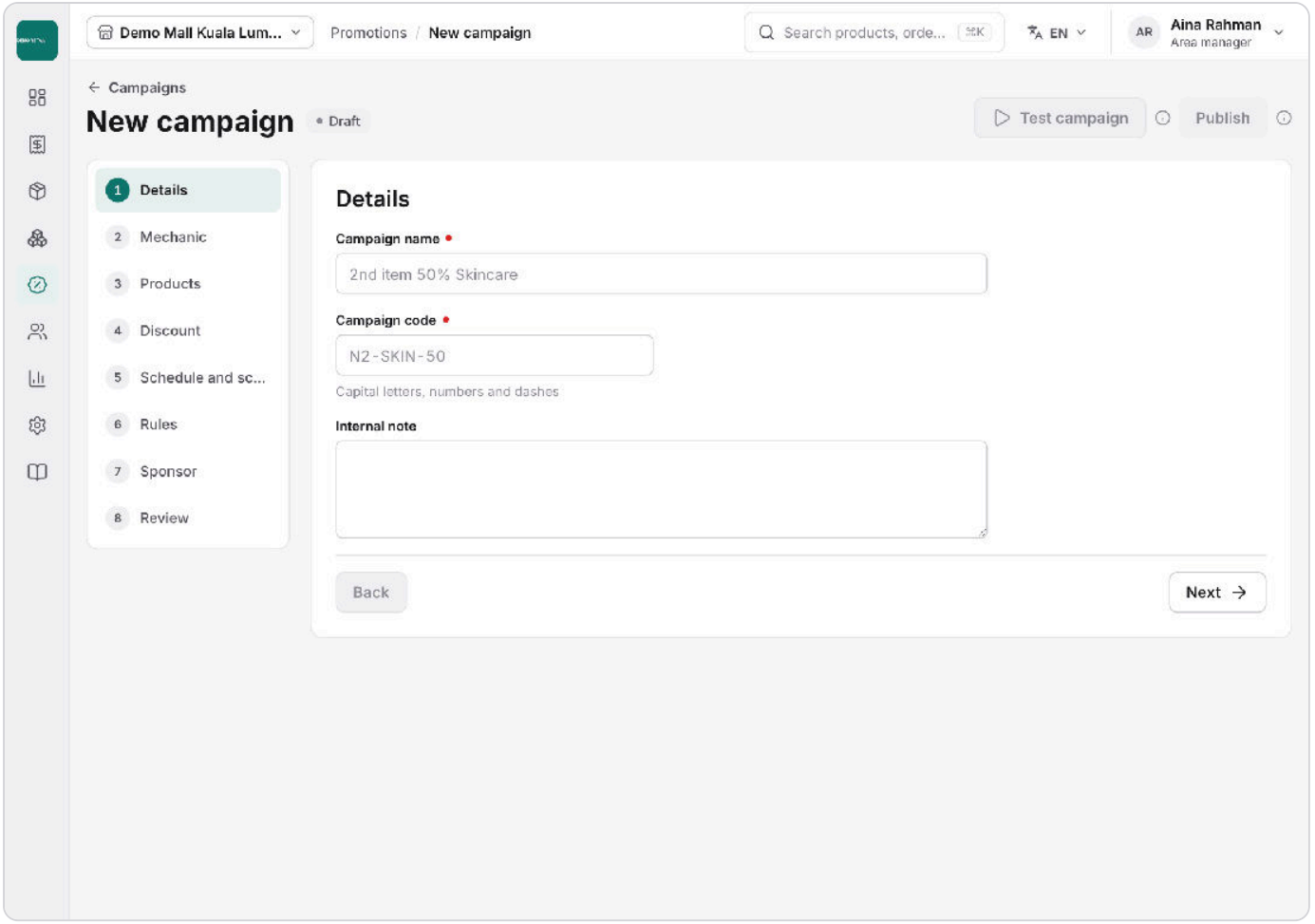
Open **Promotions**, then **Campaigns**. Each campaign is **Draft**, **Tested**, **Published** (running) or **Ended**. Filter by **Mechanic** (the type of deal) or by **Sponsor** (who pays for it).



Create a campaign

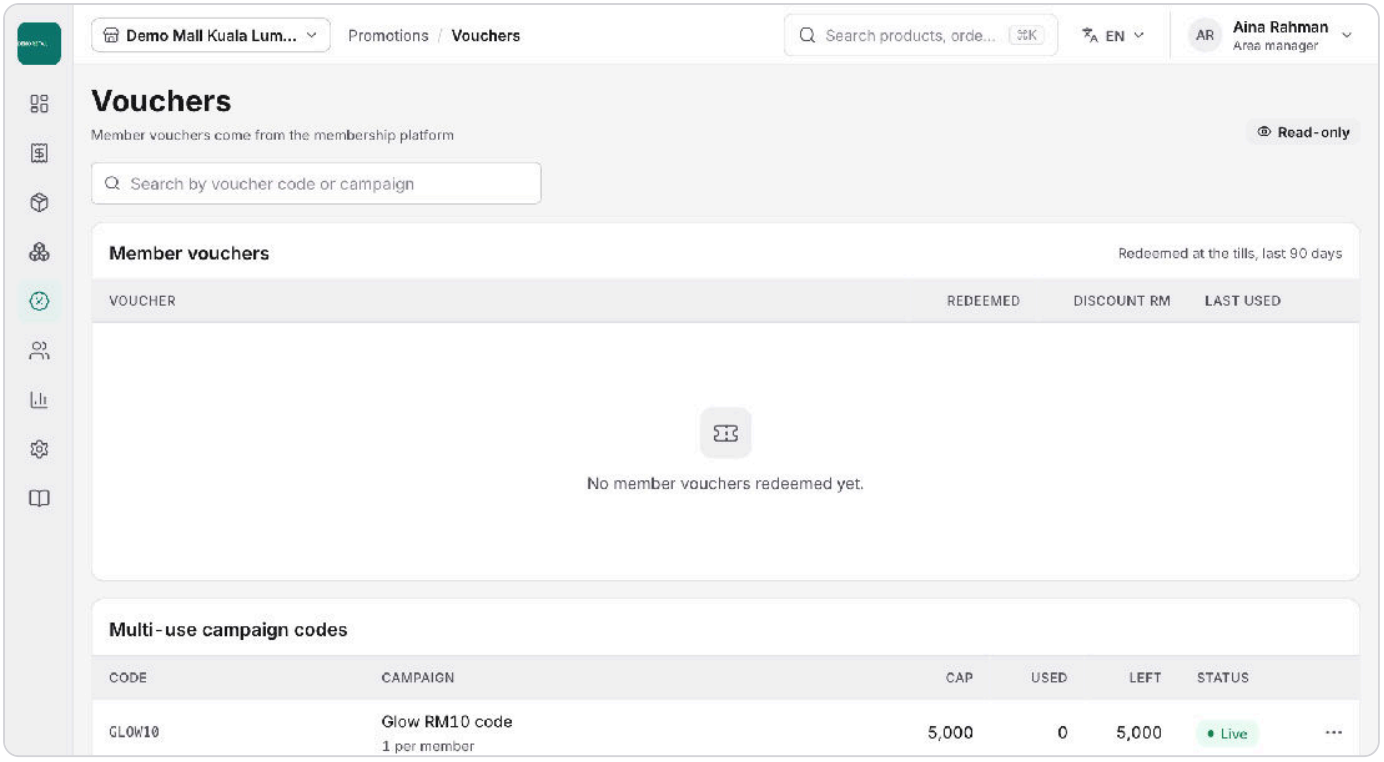
1. Press **Create campaign**.
2. Go through the 8 steps on the left with **Next**: **Details**, **Mechanic**, **Products**, **Discount**, **Schedule and scope**, **Rules**, **Sponsor** and **Review**.
3. Press **Test campaign** to try it on a sample basket. **Publish** only unlocks after a test.

4. Once published, the campaign reaches the tills on its start date.



Vouchers

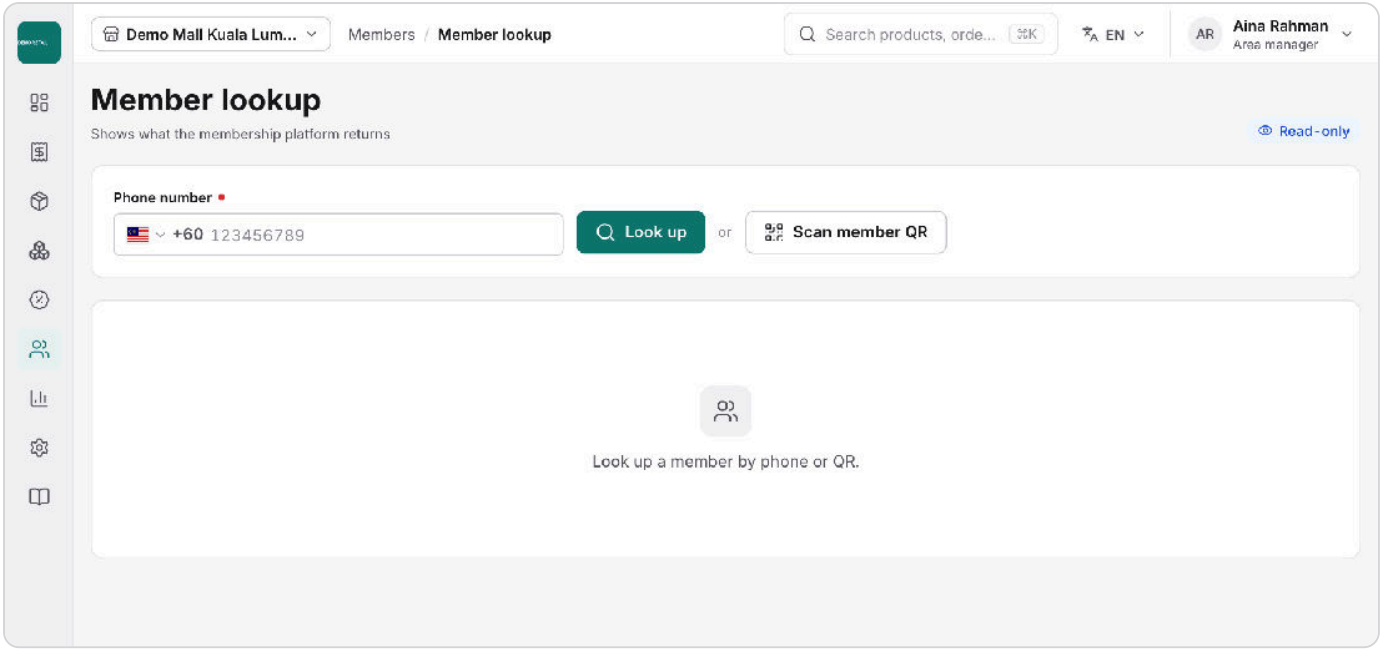
Open **Promotions**, then **Vouchers**, to see member vouchers used at the tills in the last 90 days, and the codes customers type in (**Multi-use campaign codes**). Member vouchers come from the membership system and cannot be changed here.


Demo Mall Kuala Lum...
Promotions / Vouchers
Search products, orde... ⌘K
EN
AR
Aina Rahman
Area manager
Vouchers
Member vouchers come from the membership platform
Read-only
Search by voucher code or campaign
Member vouchers
Redeemed at the tills, last 90 days
VOUCHER
REDEEMED
DISCOUNT RM
LAST USED
No member vouchers redeemed yet.
Multi-use campaign codes
CODE
CAMPAIGN
CAP
USED
LEFT
STATUS
GLOW10
Glow RM10 code
1 per member
5,000
0
5,000
Live

Look up a member

For: Everyone

1. Open **Members**, then **Member lookup**.
2. Type the member's **Phone number** and press **Look up**, or press **Scan member QR**.
3. Their tier, points and vouchers appear.

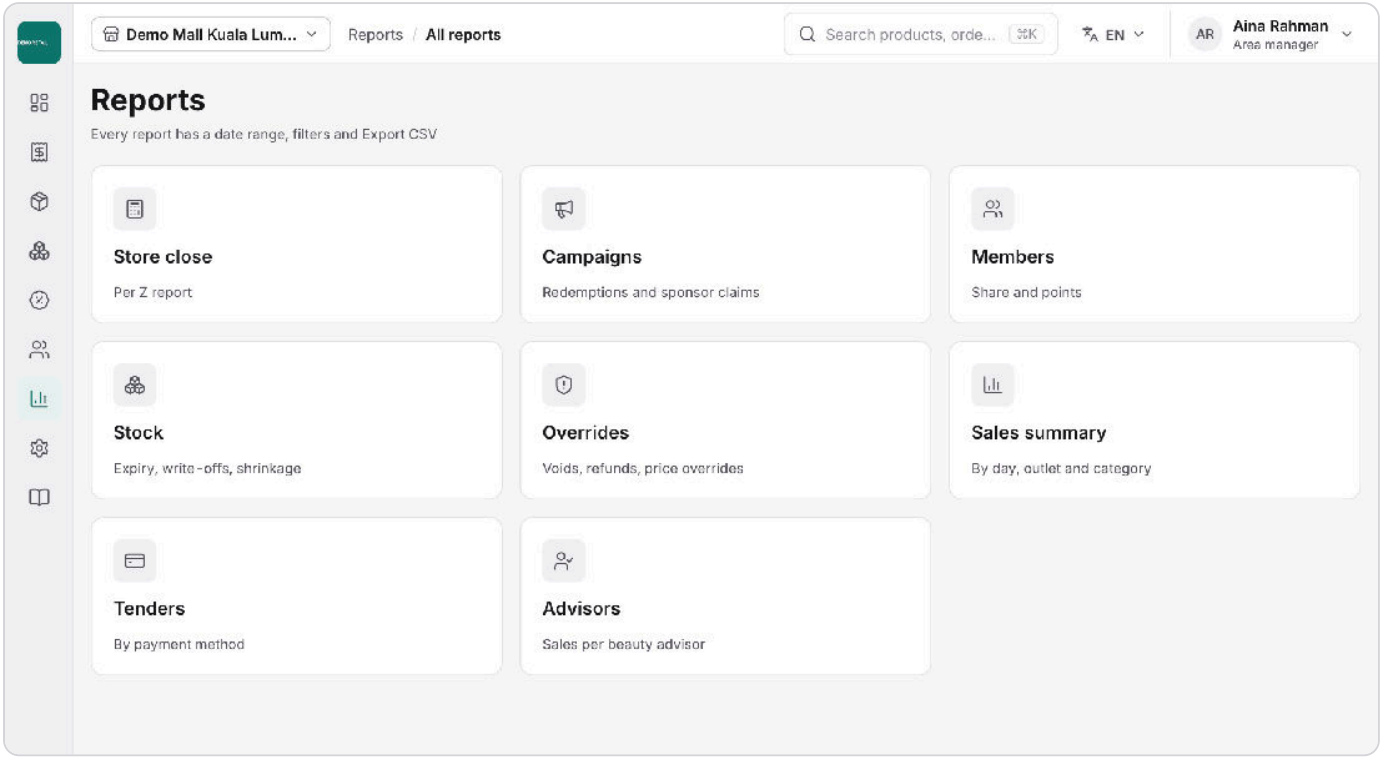


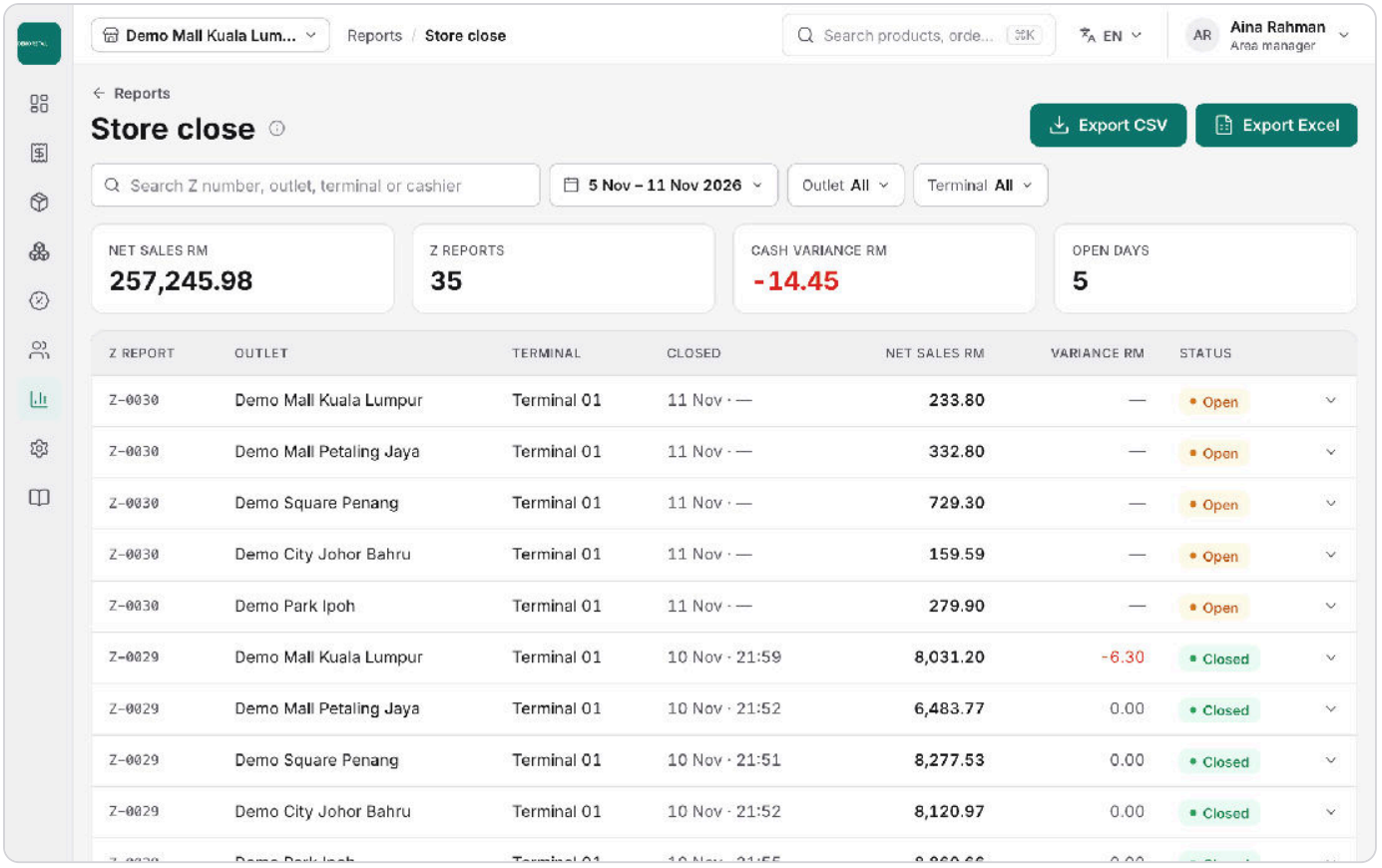
This page is read-only. Member details are changed in the membership system.

Read the reports

For: Store managers, Finance

1. Open **Reports**, then **All reports**, and pick one:
    - **Store close**: the end-of-day Z reports.
    - **Sales summary**: sales by day, outlet and category.
    - **Tenders**: sales by payment method. RHB Pay shows one line each for FPX, Card online and DuitNow.
    - **Advisors**: sales per beauty advisor.
    - **Campaigns**: promotion use and sponsor claims.
    - **Members**: member share and points.
    - **Stock**: expiry, write-offs and losses.
    - **Overrides**: voids, refunds and price changes made at the till.
2. Choose the dates and outlet at the top of the report.
3. Press **Export CSV** (or **Export Excel** where shown) to download it.




Demo Mall Kuala Lum...
Reports / Store close
Search products, orde... ⌘K
EN
AR
Aina Rahman
Area manager
Reports
Store close
Export CSV
Export Excel
Search Z number, outlet, terminal or cashier
5 Nov – 11 Nov 2026
Outlet All
Terminal All
NET SALES RM
257,245.98
Z REPORTS
35
CASH VARIANCE RM
-14.45
OPEN DAYS
5
Z REPORT | OUTLET | TERMINAL | CLOSED | NET SALES RM | VARIANCE RM | STATUS
Z-0030 | Demo Mall Kuala Lumpur | Terminal 01 | 11 Nov · — | 233.80 | — | Open
Z-0030 | Demo Mall Petaling Jaya | Terminal 01 | 11 Nov · — | 332.80 | — | Open
Z-0030 | Demo Square Penang | Terminal 01 | 11 Nov · — | 729.30 | — | Open
Z-0030 | Demo City Johor Bahru | Terminal 01 | 11 Nov · — | 159.59 | — | Open
Z-0030 | Demo Park Ipoh | Terminal 01 | 11 Nov · — | 279.90 | — | Open
Z-0029 | Demo Mall Kuala Lumpur | Terminal 01 | 10 Nov · 21:59 | 8,031.20 | -6.30 | Closed
Z-0029 | Demo Mall Petaling Jaya | Terminal 01 | 10 Nov · 21:52 | 6,483.77 | 0.00 | Closed
Z-0029 | Demo Square Penang | Terminal 01 | 10 Nov · 21:51 | 8,277.53 | 0.00 | Closed
Z-0029 | Demo City Johor Bahru | Terminal 01 | 10 Nov · 21:52 | 8,120.97 | 0.00 | Closed

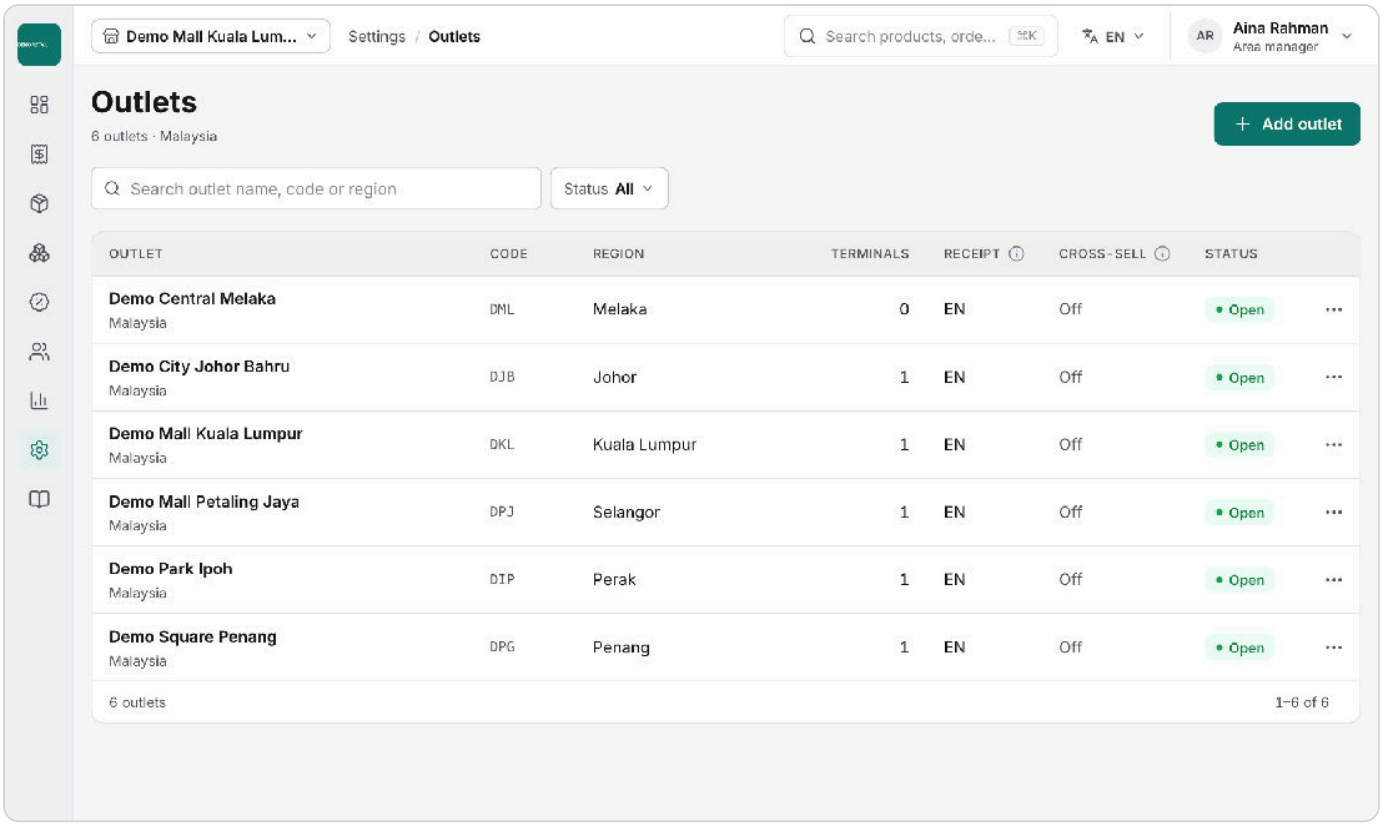
Outlets and tills

For: Administrators

Most staff do not see these pages. Outlets come from your company's central records and update every night.

Outlets

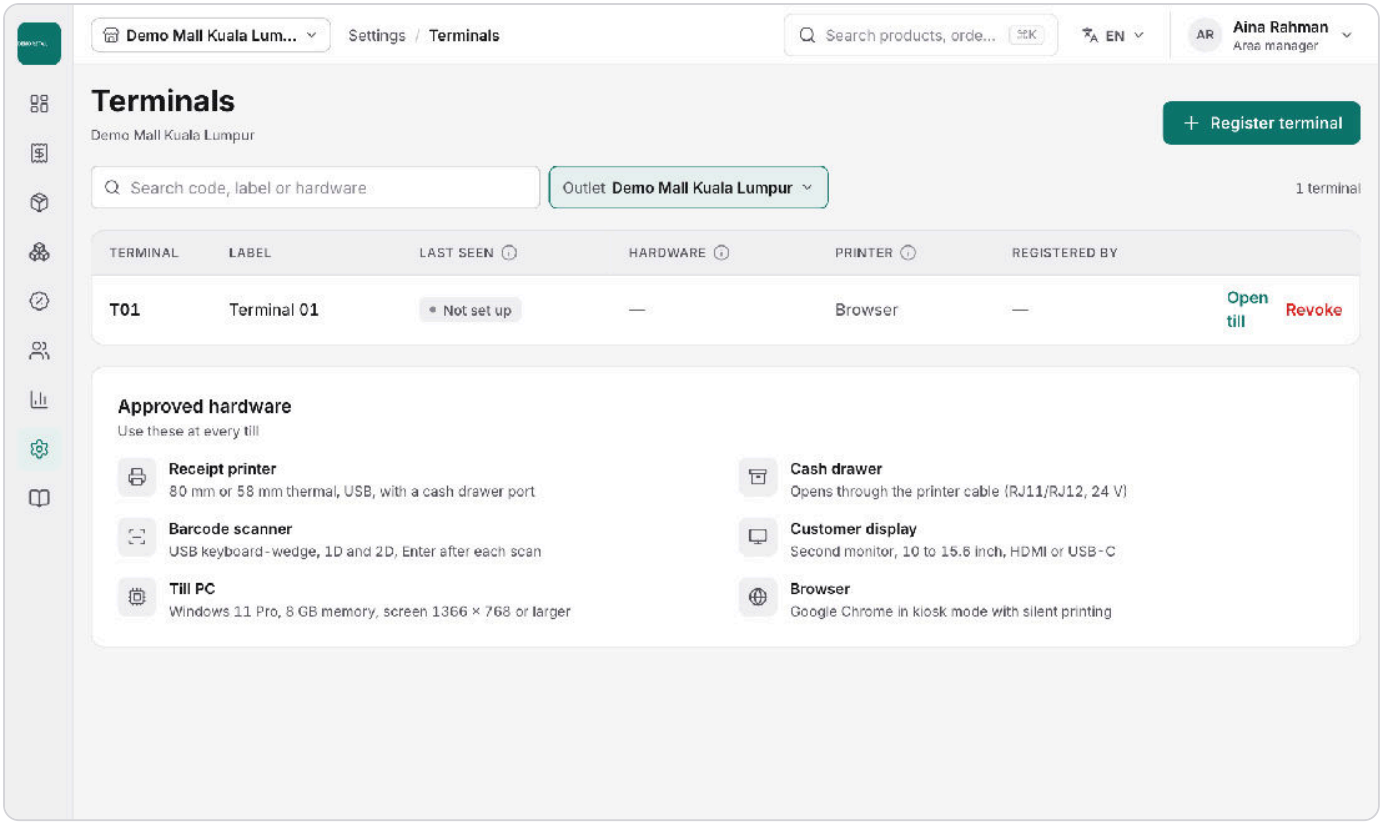
Open **Settings**, then **Outlets**, to see every outlet with its code, region, number of tills, receipt language and status. Use the ··· button on a row to change an outlet's settings.



Set up a new till computer

Each till computer is registered once for its outlet.

1. Open **Settings**, then **Terminals**.
2. Choose the **Outlet** and press **Register terminal**.
3. Follow the steps on the till.



The **Approved hardware** list below shows the receipt printer, barcode scanner, till PC, cash drawer and customer display to use at every till.

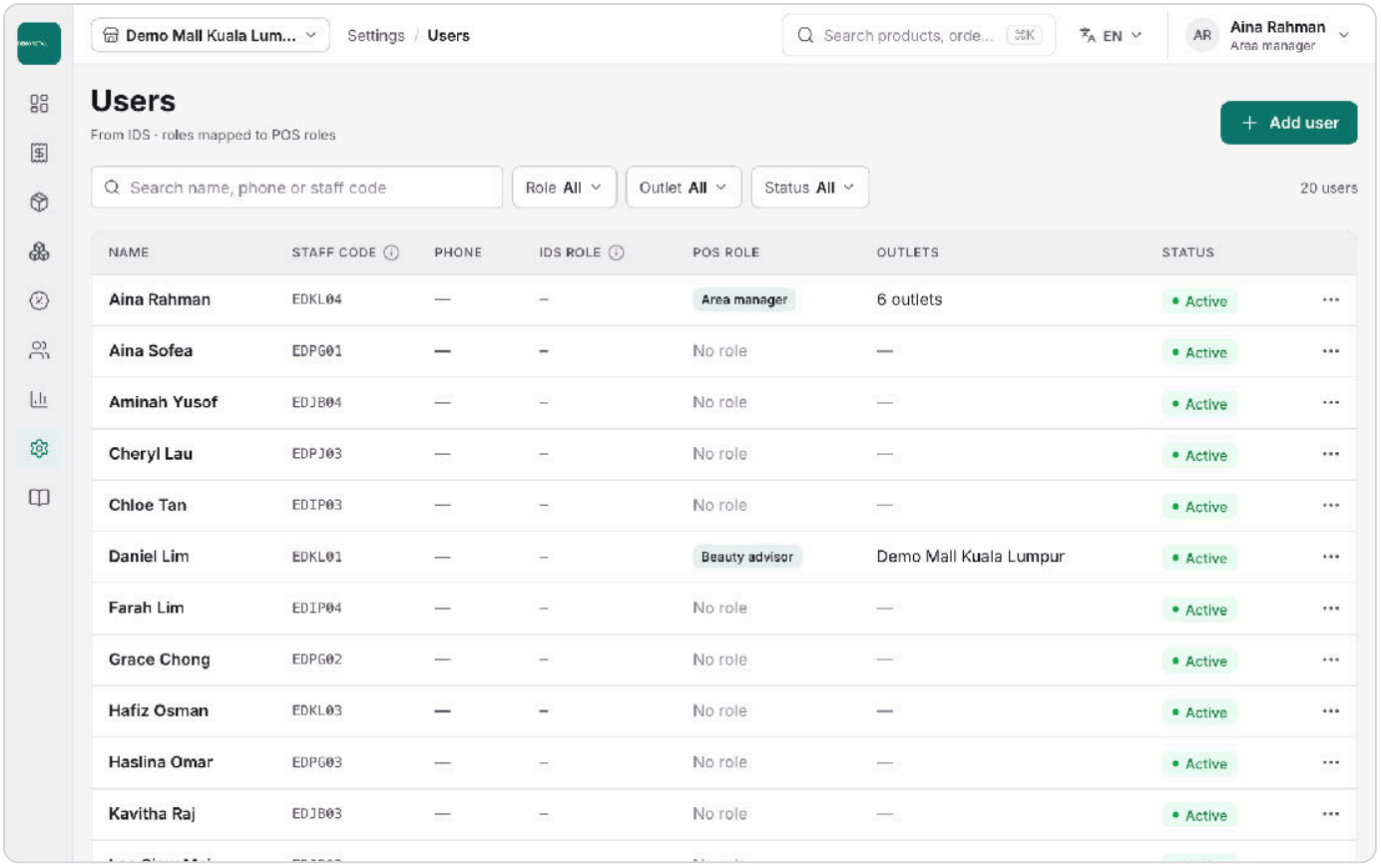
RETAIL POS

Users and roles

For: Administrators

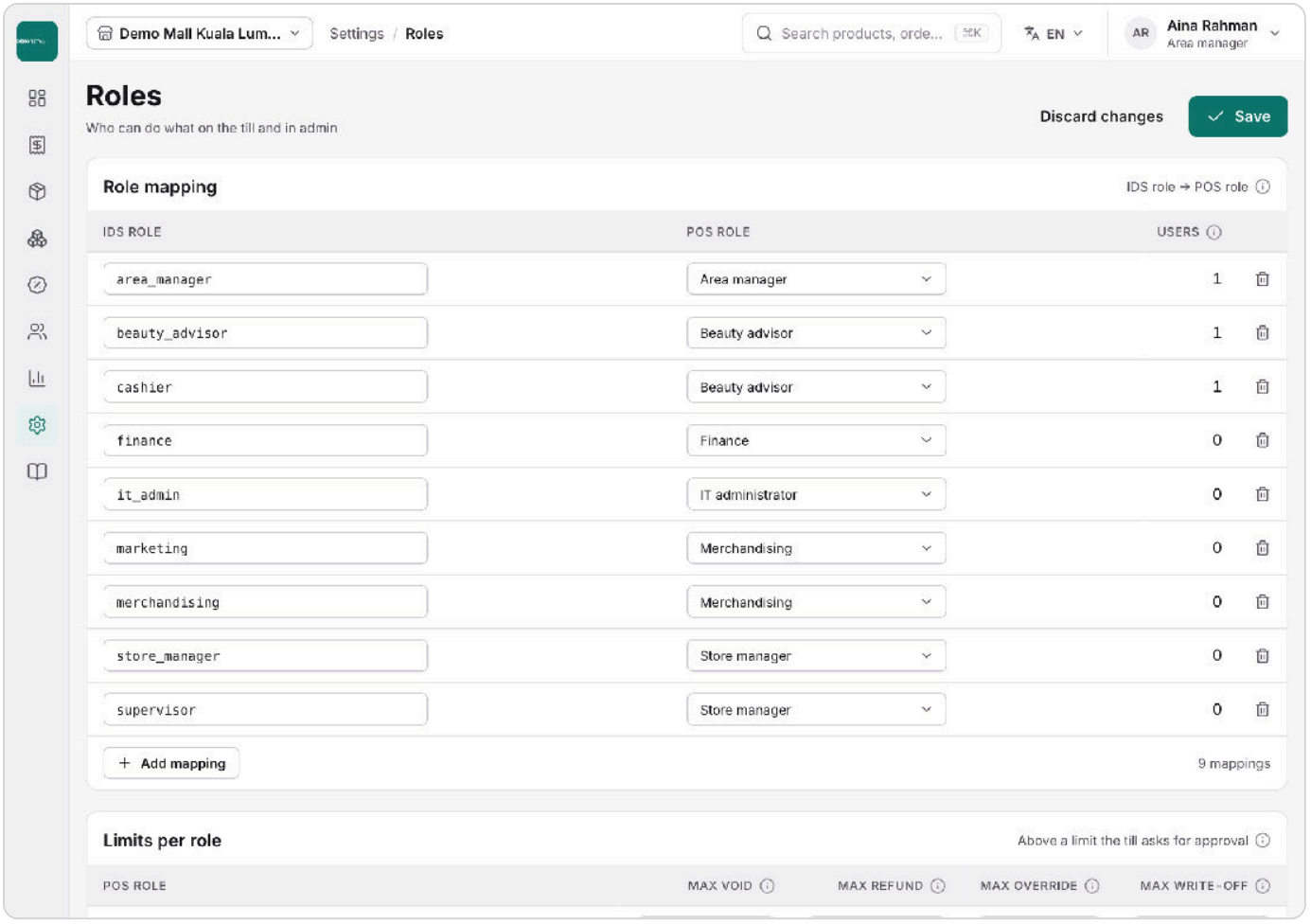
Users

Open **Settings**, then **Users**, to see who can sign in, their POS role, their outlets and whether they are active. Staff are added from the company staff directory: press **Add user** and search by name, phone or staff code.



Roles and limits

1. Open **Settings**, then **Roles**.
2. **Role mapping** links each job title from the sign-in system to a POS role.
3. **Limits per role** sets the biggest void, refund, price change and write-off a role can make. Above the limit, the till asks for a manager's approval.
4. Under **Permissions**, tick what each role may do.
5. Press **Save**, or **Discard changes** to undo.


Demo Mall Kuala Lum...
Settings / Roles
Search products, orde... ⌘K
EN
AR
Aina Rahman
Area manager
Roles
Who can do what on the till and in admin
Discard changes
Save
Role mapping
IDS role → POS role
IDS ROLE
POS ROLE
USERS
area_manager
Area manager
1
beauty_advisor
Beauty advisor
1
cashier
Beauty advisor
1
finance
Finance
0
it_admin
IT administrator
0
marketing
Merchandising
0
merchandising
Merchandising
0
store_manager
Store manager
0
supervisor
Store manager
0
Add mapping
9 mappings
Limits per role
Above a limit the till asks for approval
POS ROLE
MAX VOID
MAX REFUND
MAX OVERRIDE
MAX WRITE-OFF

USER GUIDE · VERSION 1

Inventory with RFID

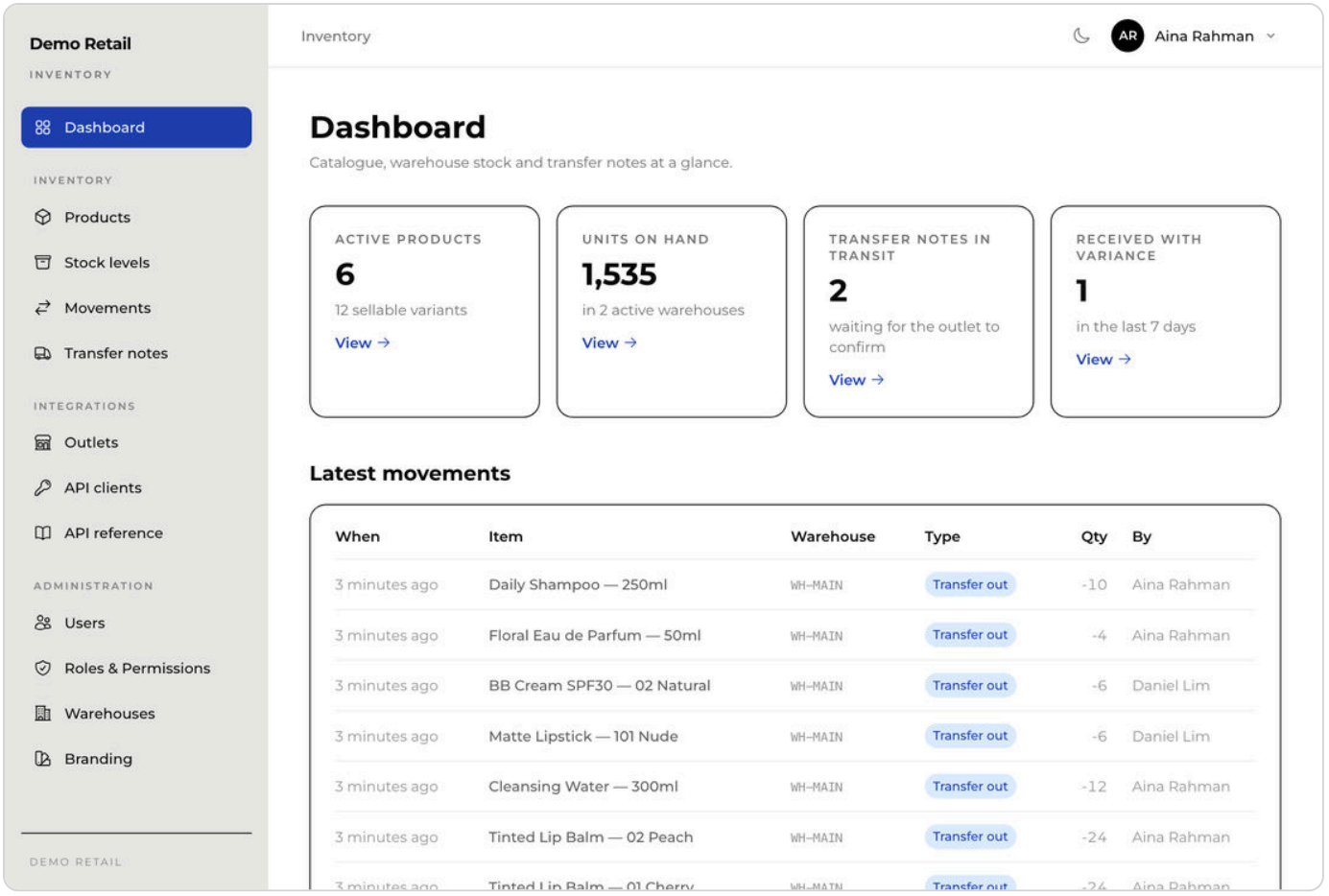
Keeps the product list and the stock in your warehouses, and sends stock to outlets and the online store on transfer notes. RFID tag reading is planned and not built yet.

1. What it is for
2. Add a product
3. Receive and correct stock
4. See every stock movement
5. Send stock to an outlet
6. Check what arrived
7. Connect the online store and the tills
8. Give someone access
9. Warehouses and branding

What it is for

For: Everyone

Inventory is where your company keeps its product list and the stock held in its warehouses. When stock leaves a warehouse for an outlet or the online store, it goes on a transfer note. The outlet's till system or the online store receives the goods and reports back what arrived, so you can see anything that went missing or was damaged on the way.



Still being built

- **RFID** (reading stock with radio tags instead of scanning barcodes) is planned. Nothing for it exists in Inventory yet.
- Inventory only counts stock in **warehouses**. Once a transfer note is received, the outlet's own system keeps that stock.
- The **Outlets** screen does not open in the current version: it shows an error. The outlet list still arrives from Master data on its own.

Words used on the screens

- **Variant**: one thing you sell, such as one shade or one size of a product. Stock and prices are kept per variant.
- **SKU**: the code that identifies one variant, for example DMO-TLB-01.
- **Transfer note**: the paper trail for stock moving from a warehouse to an outlet. Its number starts with TN and the outlet's code.

Who uses it

The roles, as named on screen:

- **Stock Clerk**: sees products and stock, receives and corrects stock, and makes transfer notes.
- **Inventory Manager**: everything a Stock Clerk does, plus adding and changing products and connecting the online store and tills.
- **Super Admin**: everything, including people, roles, warehouses and branding.

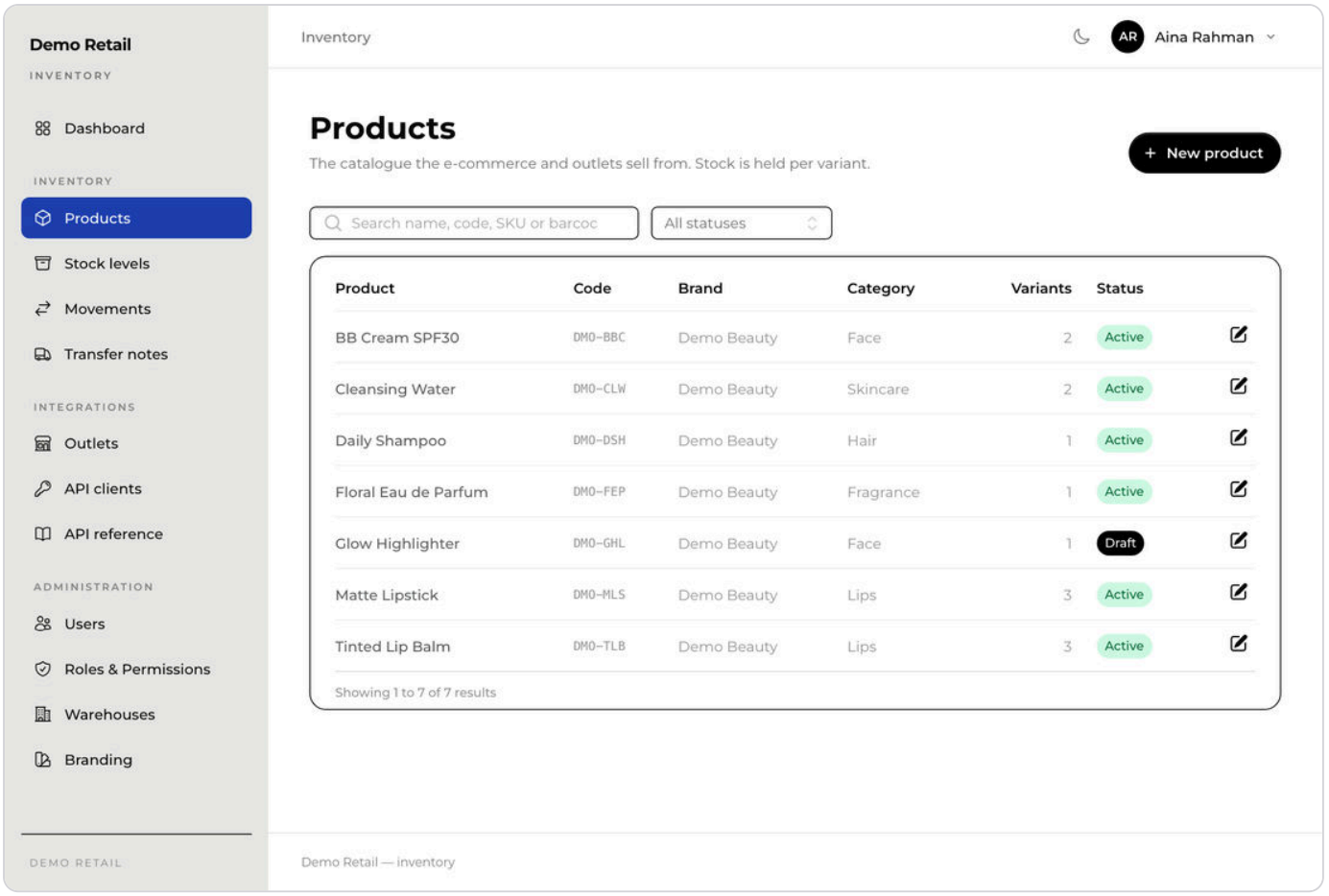
What it needs

- **Master data** for the list of outlets and for signing in staff.
- The till system and the online store, to receive transfer notes and confirm what arrived.

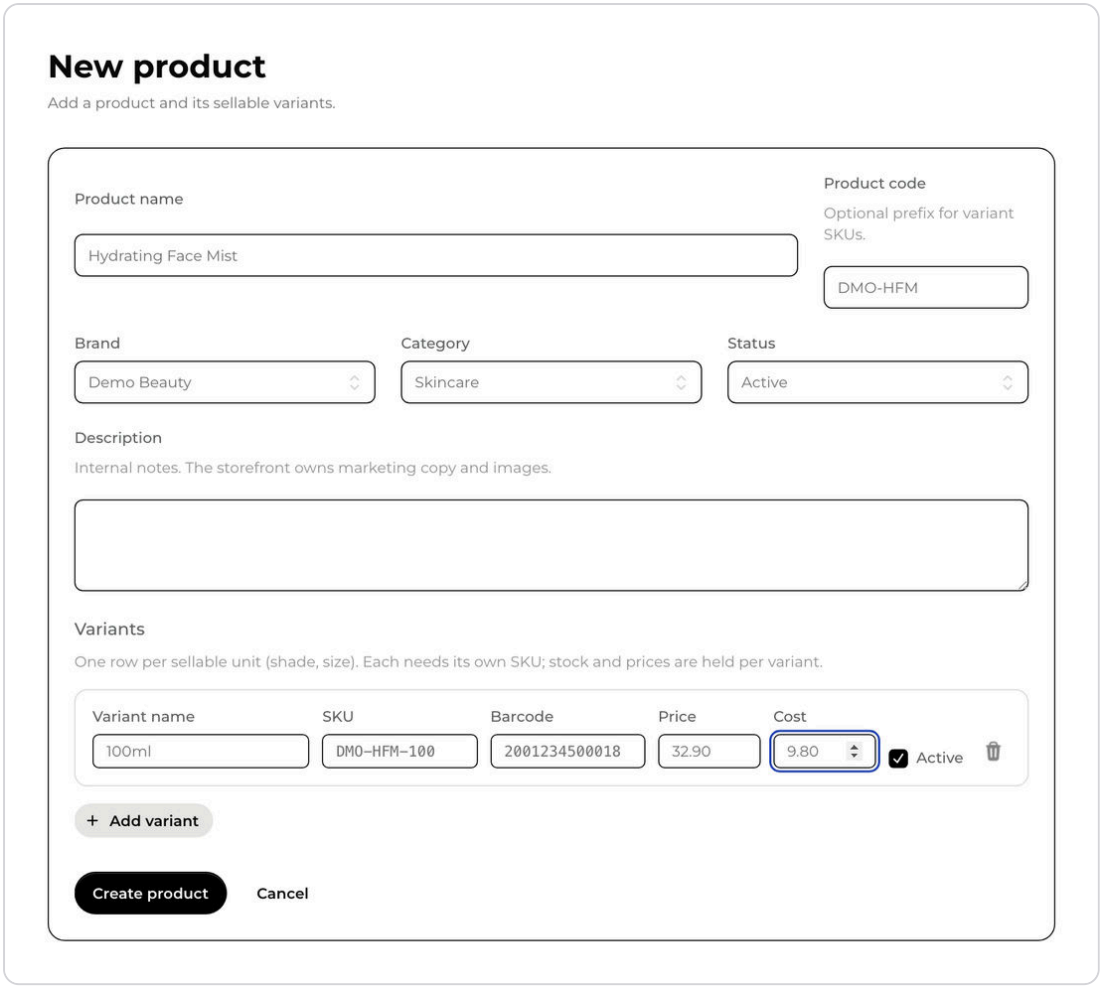
Add a product

For: Inventory managers

1. Open **Products** in the menu on the left. Use the search box to find a product by name, code, SKU or barcode, or pick a status to narrow the list.



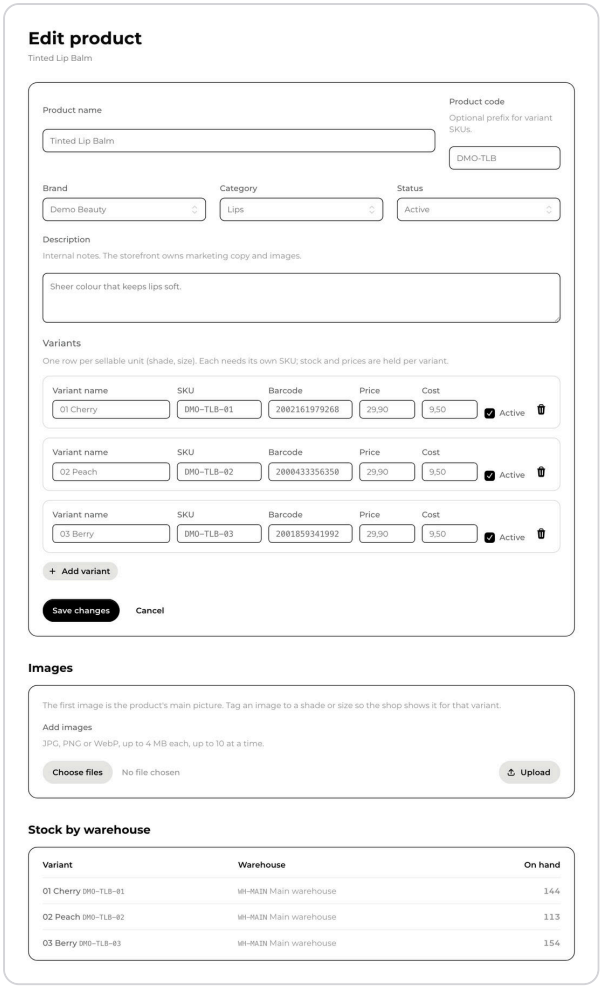
2. Press **New product**.
3. Type the **Product name**. The **Product code** is optional; it is a short code you can start every SKU with.
4. Pick the **Brand**, **Category** and **Status**:
   - **Active**: on sale. The online store's product list shows only active products.
   - **Draft**: not ready to sell yet.
   - **Discontinued**: no longer sold.
5. Under **Variants**, add one row for each shade or size. Each needs its own **SKU**. Fill in the **Barcode**, the selling **Price** and the **Cost** if you have them. Press **Add variant** for another row.
6. Press **Create product**.



Change a product, add pictures, see its stock

Press the pencil button at the end of the product's row. The same form opens with **Save changes**. Below it:

- **Images**: press **Choose files**, then **Upload**. The first picture is the main one. You can tag a picture to one shade or size so the online store shows it for that variant.
- **Stock by warehouse**: how many of each variant every warehouse holds.



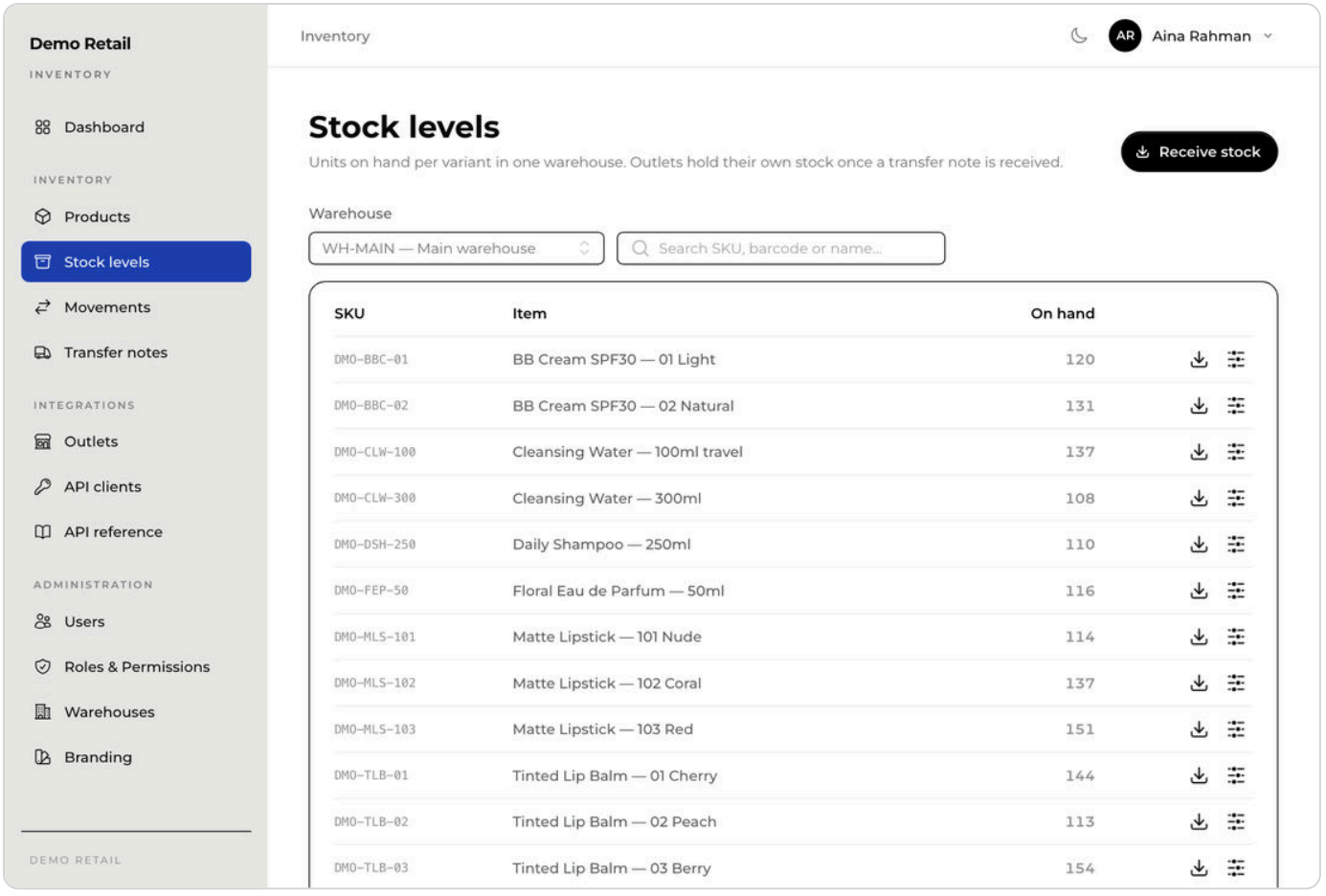
The **Description** is for staff only. The online store keeps its own product text.

Receive and correct stock

For: Stock clerks

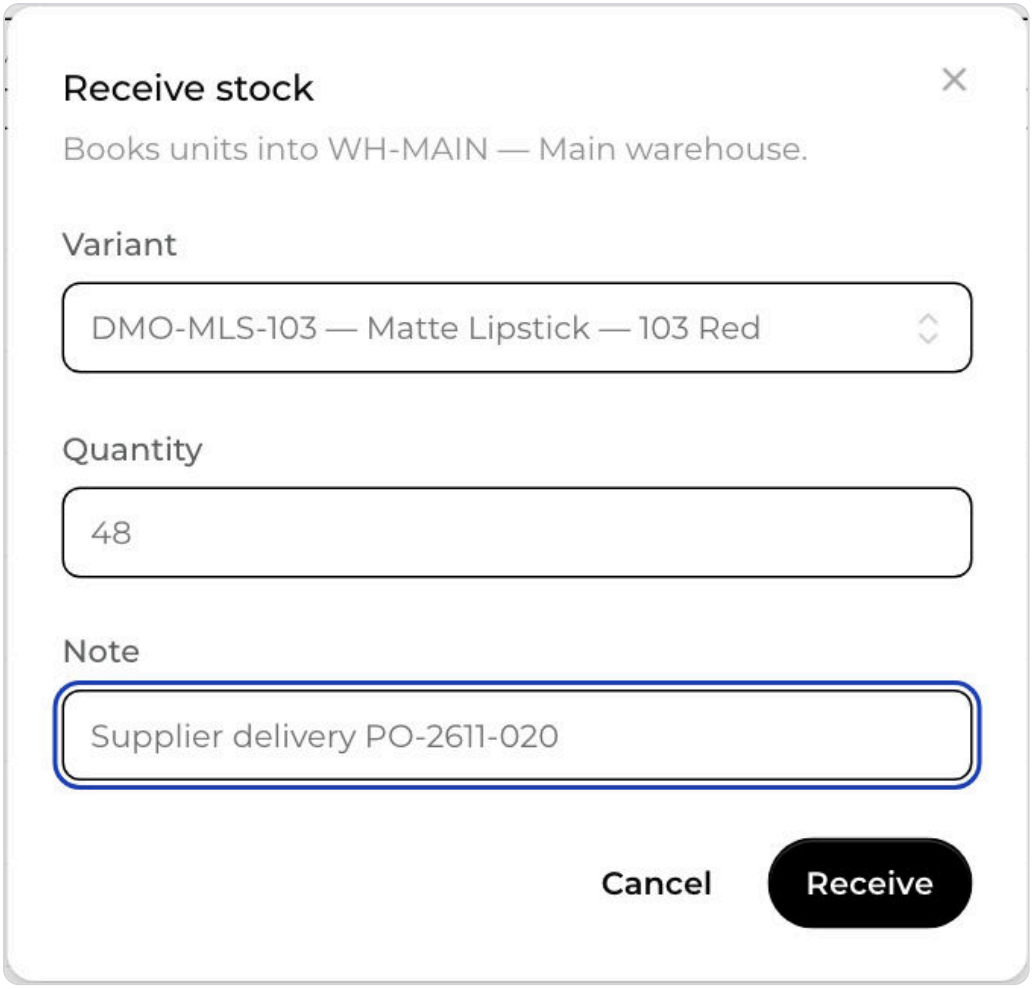
Stock levels shows how many of each variant one warehouse holds.

1. Open **Stock levels** in the menu on the left.
2. Pick the **Warehouse** at the top. Type in the search box to find an SKU, barcode or name.



Receive a delivery

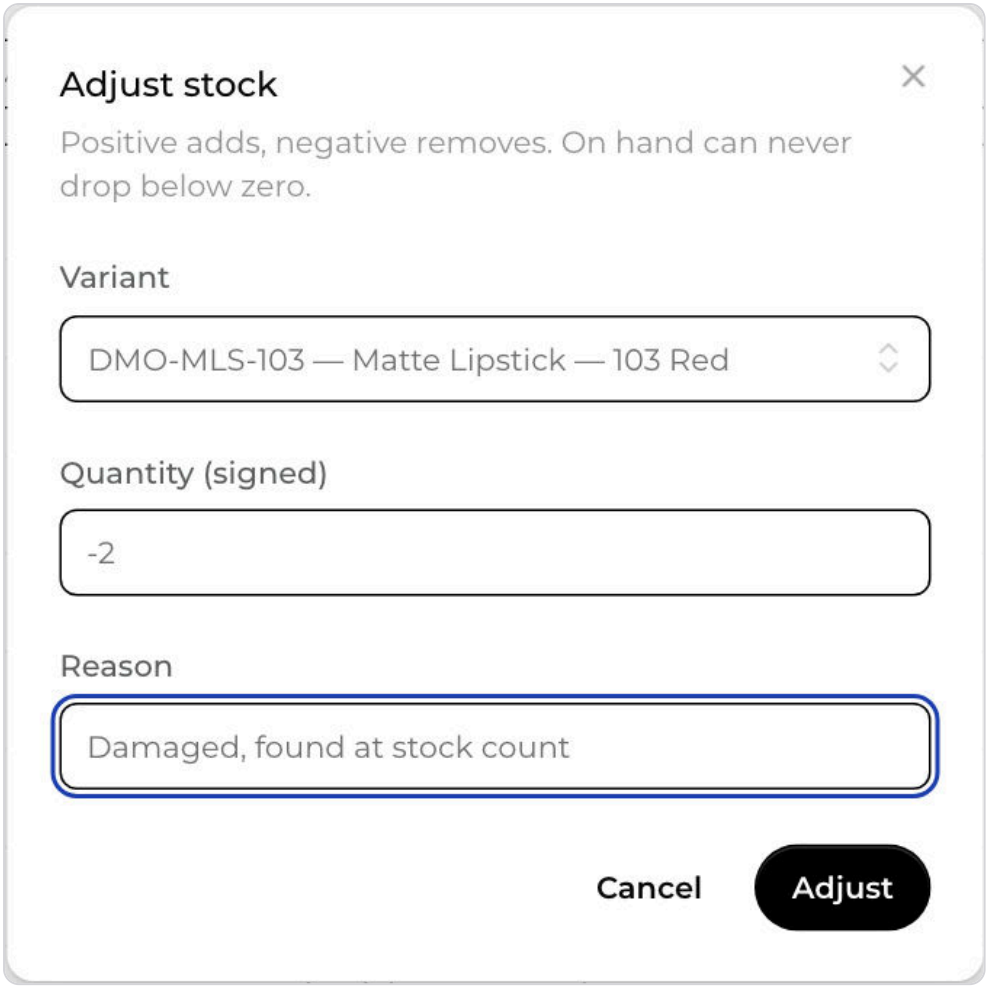
1. Press **Receive stock** at the top right, or the download-arrow button on the variant's row.
2. Pick the **Variant**, type the **Quantity**, and add a **Note**, for example the supplier's delivery number.
3. Press **Receive**.



Correct a count

Use this after a stock count, or when something is damaged or used as a tester.

1. Press the button with sliders on the variant's row.
2. In **Quantity (signed)**, type a plus number to add or a minus number to remove, for example -2.
3. Write the **Reason**.
4. Press **Adjust**.



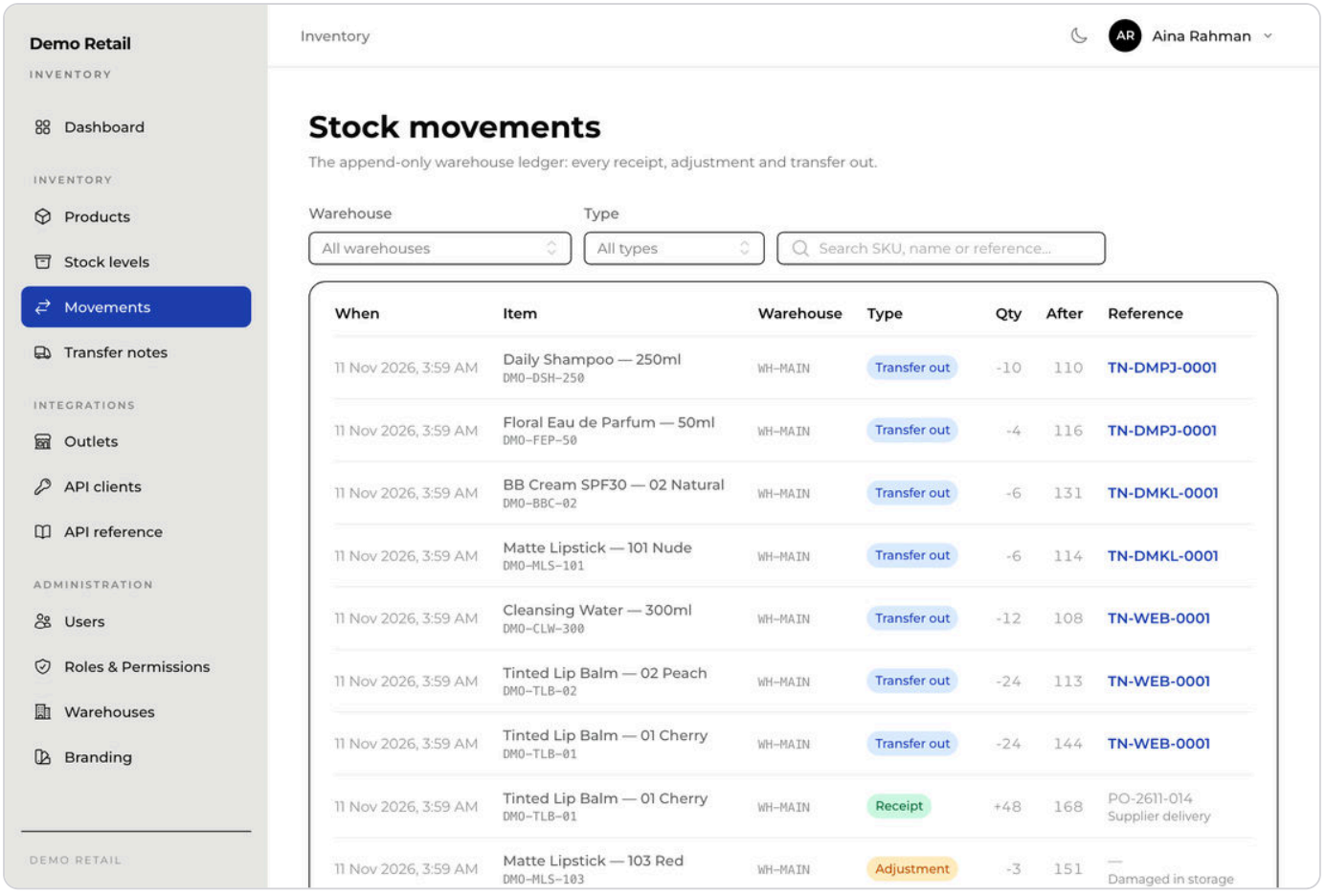
Stock can never go below zero. Every receipt and correction is recorded, and **Latest movements** on the dashboard shows who made it (see also *See every stock movement*).

See every stock movement

For: Stock clerks

Every change to warehouse stock is recorded and cannot be edited, so you can always see why a number changed.

1. Open **Movements** in the menu on the left.
2. Narrow the list by **Warehouse** or **Type**, or search by SKU, name or reference.



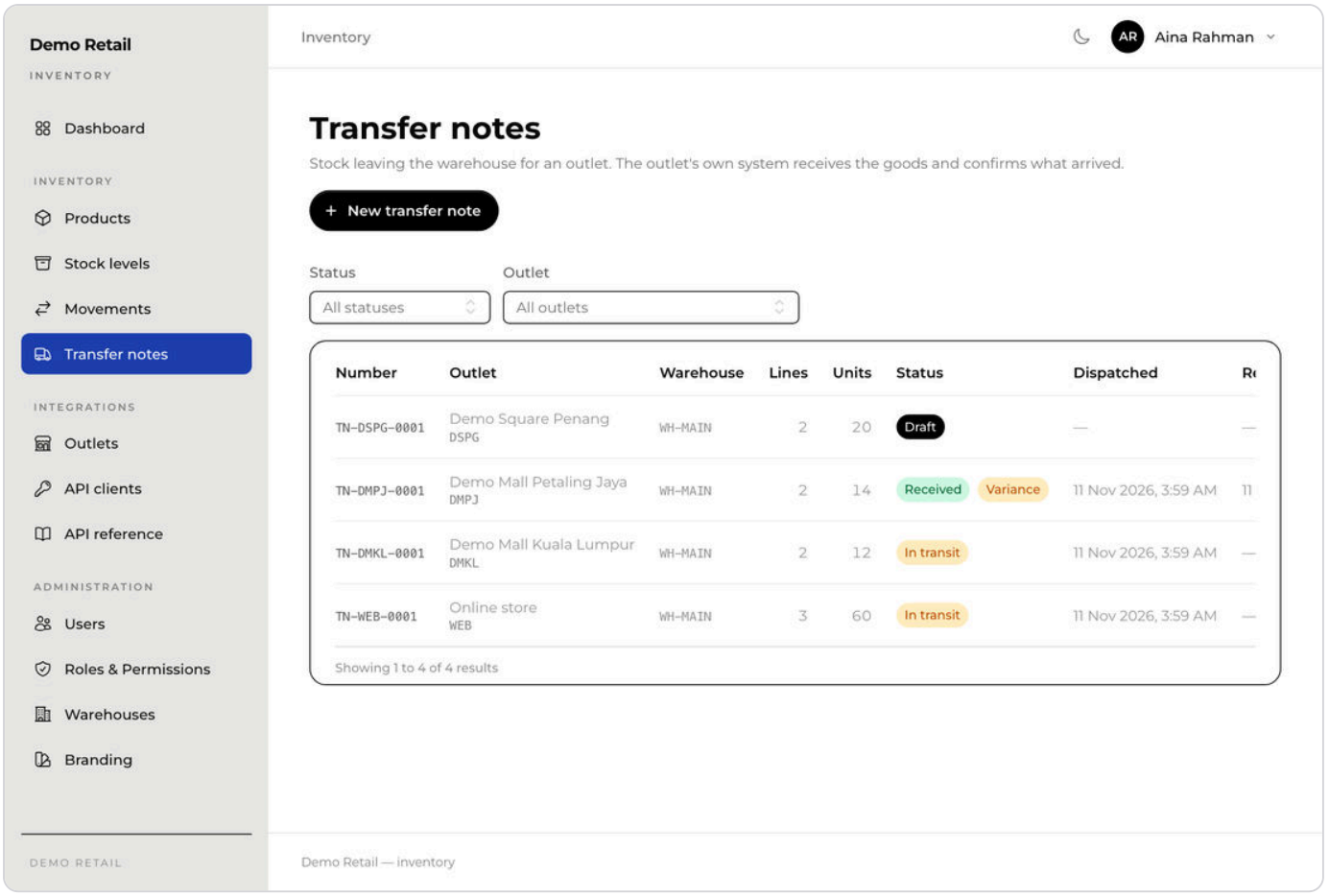
Type	Meaning
Receipt	Stock received into the warehouse.
Adjustment	A correction after a count or damage.
Transfer out	Stock that left on a transfer note.

After is how many the warehouse held straight after that movement.

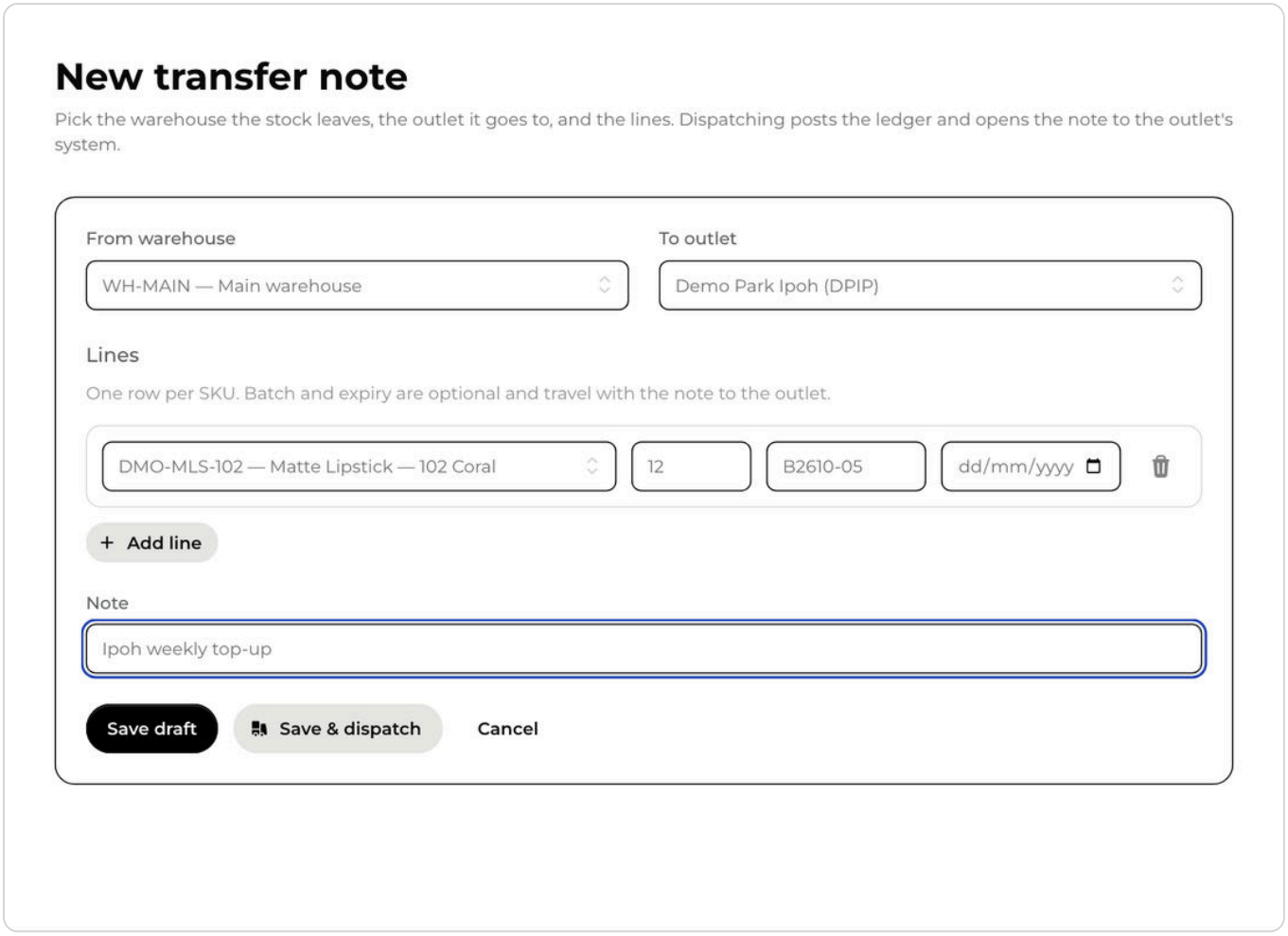
Send stock to an outlet

For: Stock clerks

1. Open **Transfer notes** in the menu on the left. Filter by **Status** or **Outlet** to find a note.



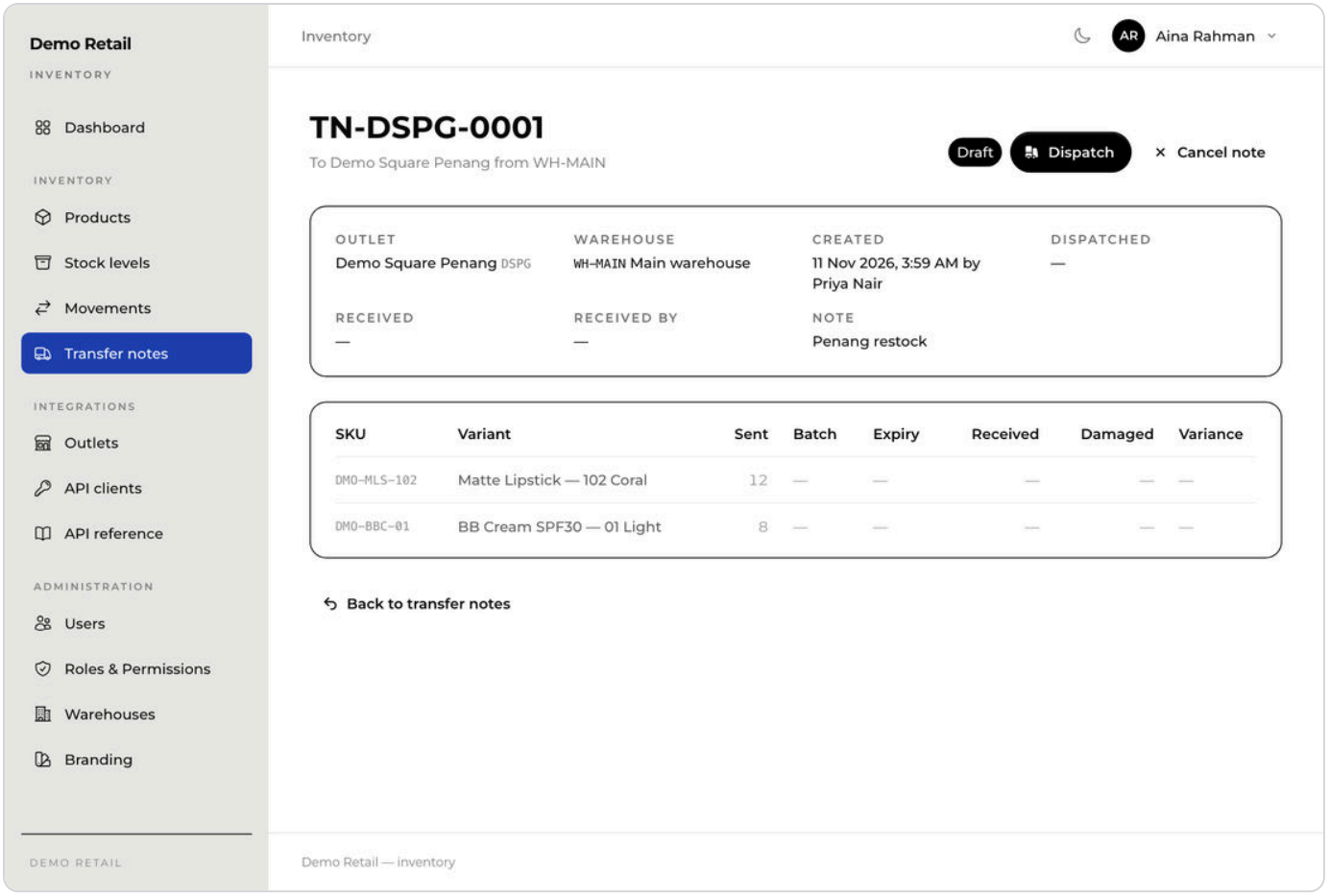
2. Press **New transfer note**.
3. Pick **From warehouse** and **To outlet**.
4. Under **Lines**, pick a variant and type how many to send. The batch number and expiry date are optional; they travel with the note to the outlet. Press **Add line** for more.
5. Add a **Note** if it helps the outlet.
6. Press **Save draft** to finish later, or **Save & dispatch** if the goods are leaving now.



Dispatch a draft

Open the draft and press **Dispatch**, then confirm. The stock is taken off the warehouse at that moment, and the outlet's system can now see the note. If the warehouse does not hold enough, Inventory refuses and nothing is sent.

Cancel note throws away a draft. A dispatched note cannot be cancelled.



While the goods are on the way

The note shows **In transit** and "Waiting for the outlet". Nobody confirms it in Inventory: the outlet's till system or the online store receives the goods in its own screens and reports back.

TN-WEB-0001

To Online store from WH-MAIN

In transit

OUTLET	WAREHOUSE	CREATED	DISPATCHED
Online store WEB	WH-MAIN Main warehouse	11 Nov 2026, 3:59 AM by Aina Rahman	11 Nov 2026, 3:59 AM by Aina Rahman
RECEIVED	**RECEIVED BY**	**NOTE**	
—	—	Weekly online store top-up	

Waiting for the outlet

The stock has left WH-MAIN. The outlet's own system (the POS or the shop) pulls this note, receives the goods, and confirms the quantities here.

SKU	Variant	Sent	Batch	Expiry	Received	Damaged	Variance
DMO-TLB-01	Tinted Lip Balm — 01 Cherry	24	B2609-17	11 Jul 2028	—	—	—
DMO-TLB-02	Tinted Lip Balm — 02 Peach	24	B2609-17	11 Jul 2028	—	—	—
DMO-CLW-300	Cleansing Water — 300ml	12	—	—	—	—	—

Back to transfer notes

Check what arrived

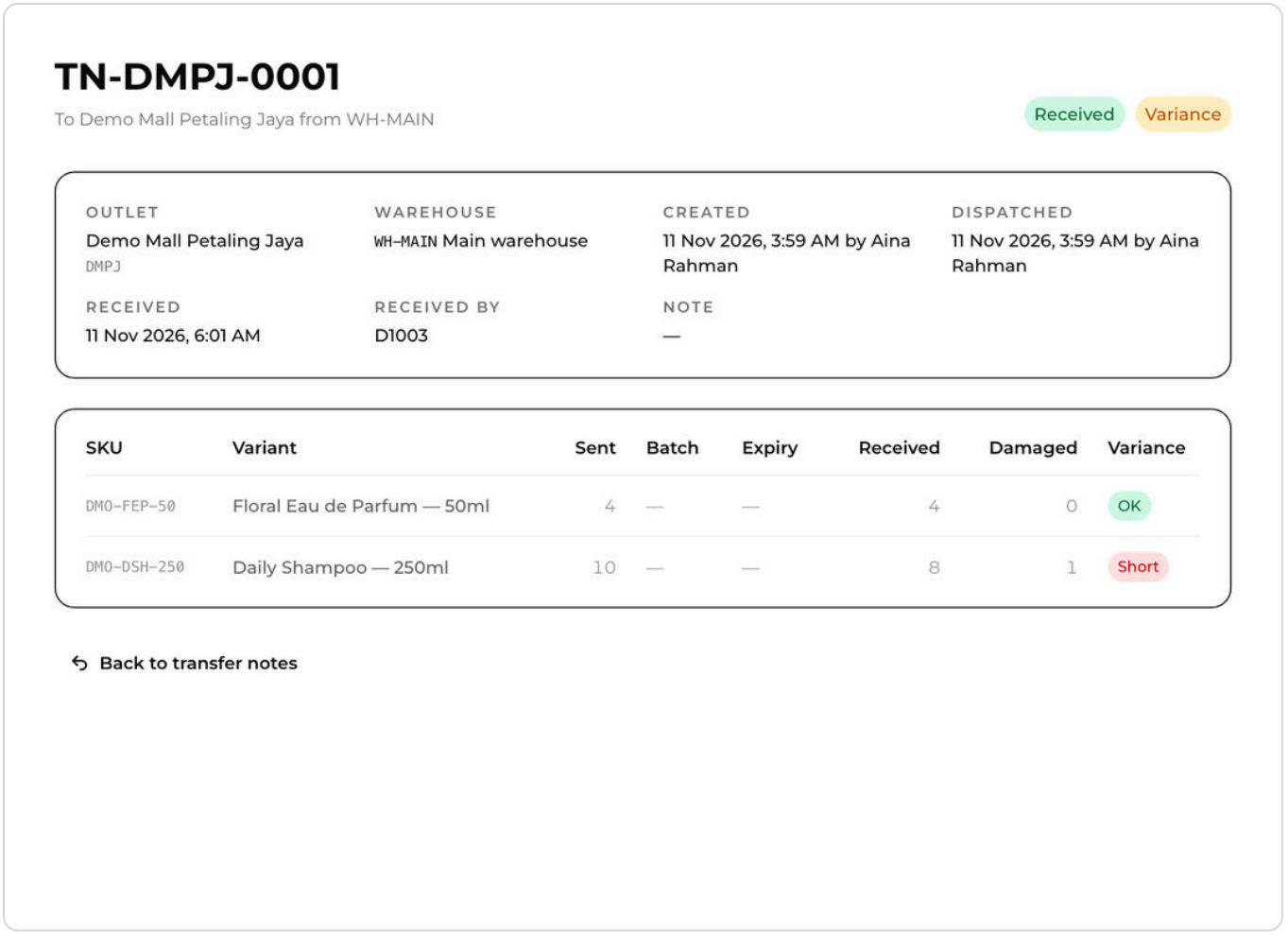
For: Stock clerks

When the outlet confirms a note, its status changes to **Received** and the arrival date and the staff code of the person who received it are filled in.

If what arrived does not match what was sent, the note also shows **Variance**. The dashboard counts these under **Received with variance** for the last 7 days.

Open the note to see each line:

- **Sent**: how many left the warehouse.
- **Received** and **Damaged**: what the outlet reported.
- **Variance**: **OK** when everything arrived, **Short** when fewer arrived or some were damaged, **Excess** when more arrived than were sent.



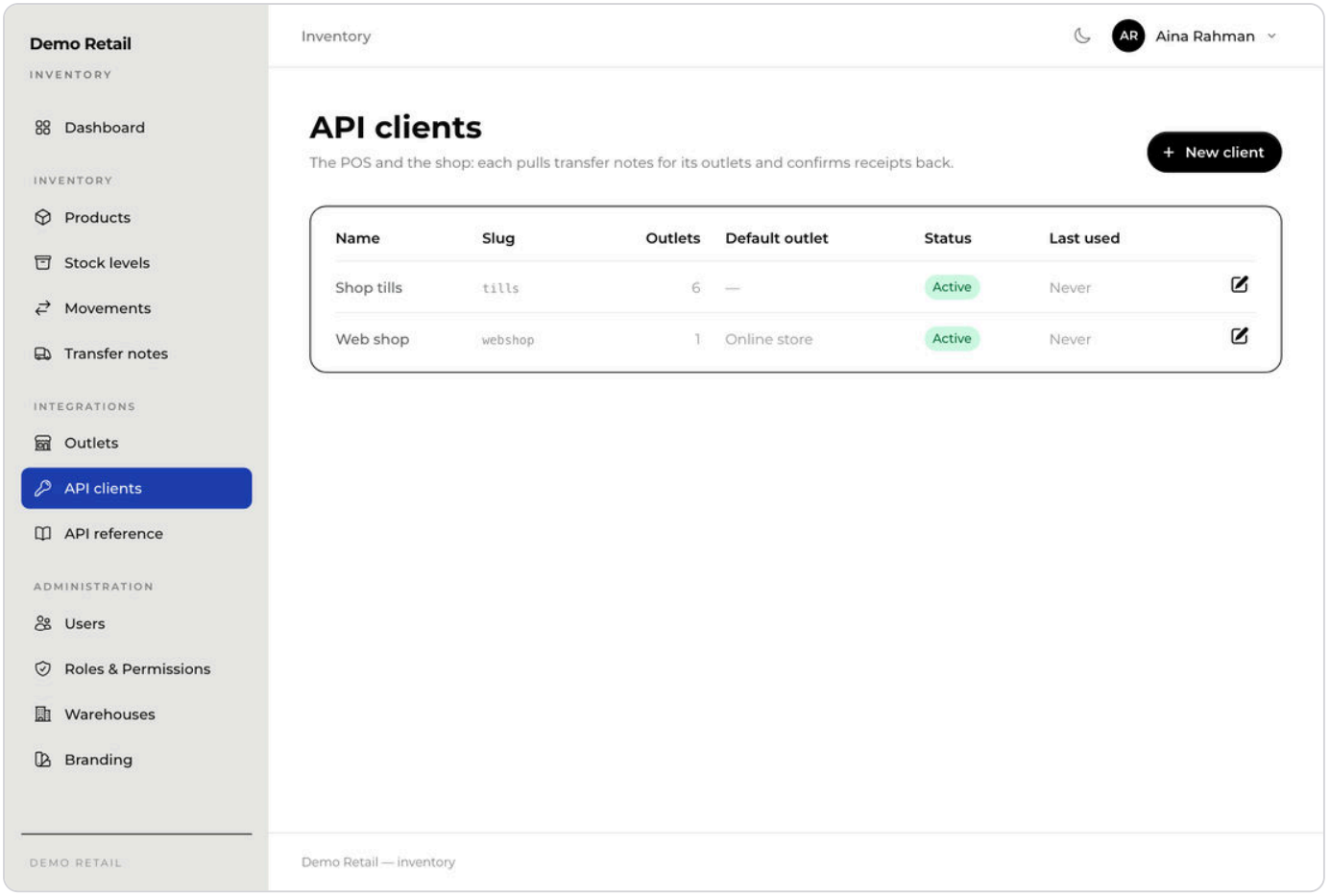
Inventory records the difference but does not fix it. Follow up with the outlet, and correct warehouse stock if the goods never left (see *Receive and correct stock*).

Connect the online store and the tills

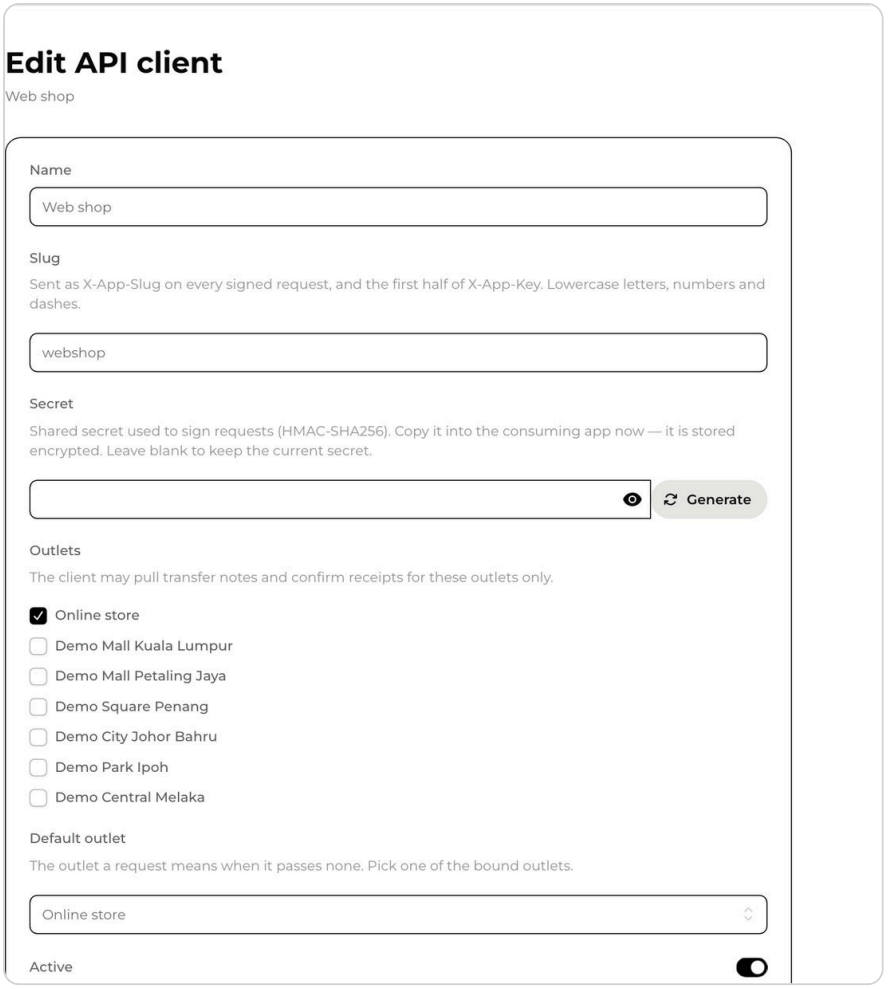
For: Administrators

The online store and the till system each need a login, called an API client, to read transfer notes and the product list and to confirm what arrived.

1. Open **API clients** under **Integrations** in the menu.



2. Press **New client**, or the pencil button at the end of a client's row to change it.
3. Type a **Name** and a **Slug**, the short name the other system uses (lowercase letters, numbers and dashes).
4. Press **Generate** to make a **Secret**, a password the other system uses. Copy it straight away: it is stored locked and cannot be shown again later.
5. Under **Outlets**, tick the outlets this system may receive stock for. The online store gets the online store outlet; the tills get the shops.
6. Pick a **Default outlet** if the system serves only one outlet.
7. Leave **Active** on, and press **Create client** or **Save changes**.



Give the slug and secret to the person setting up the other system. **API reference** in the menu opens the technical instructions for them.

Switching off **Active** cuts that system off at once.

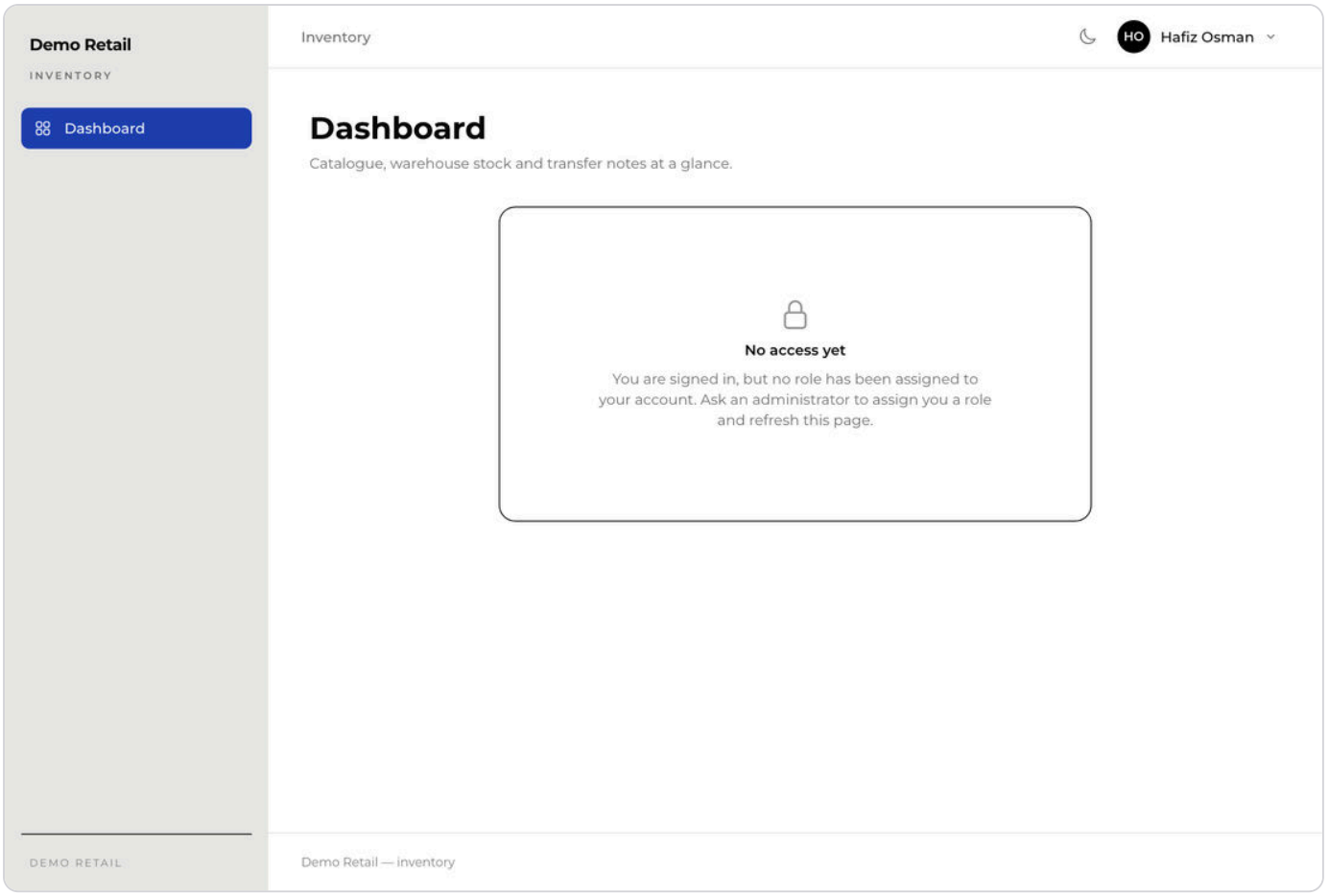
Outlets

The outlet list comes from Master data on its own. The **Outlets** screen, meant to show that list and a **Sync now** button, shows an error in the current version.

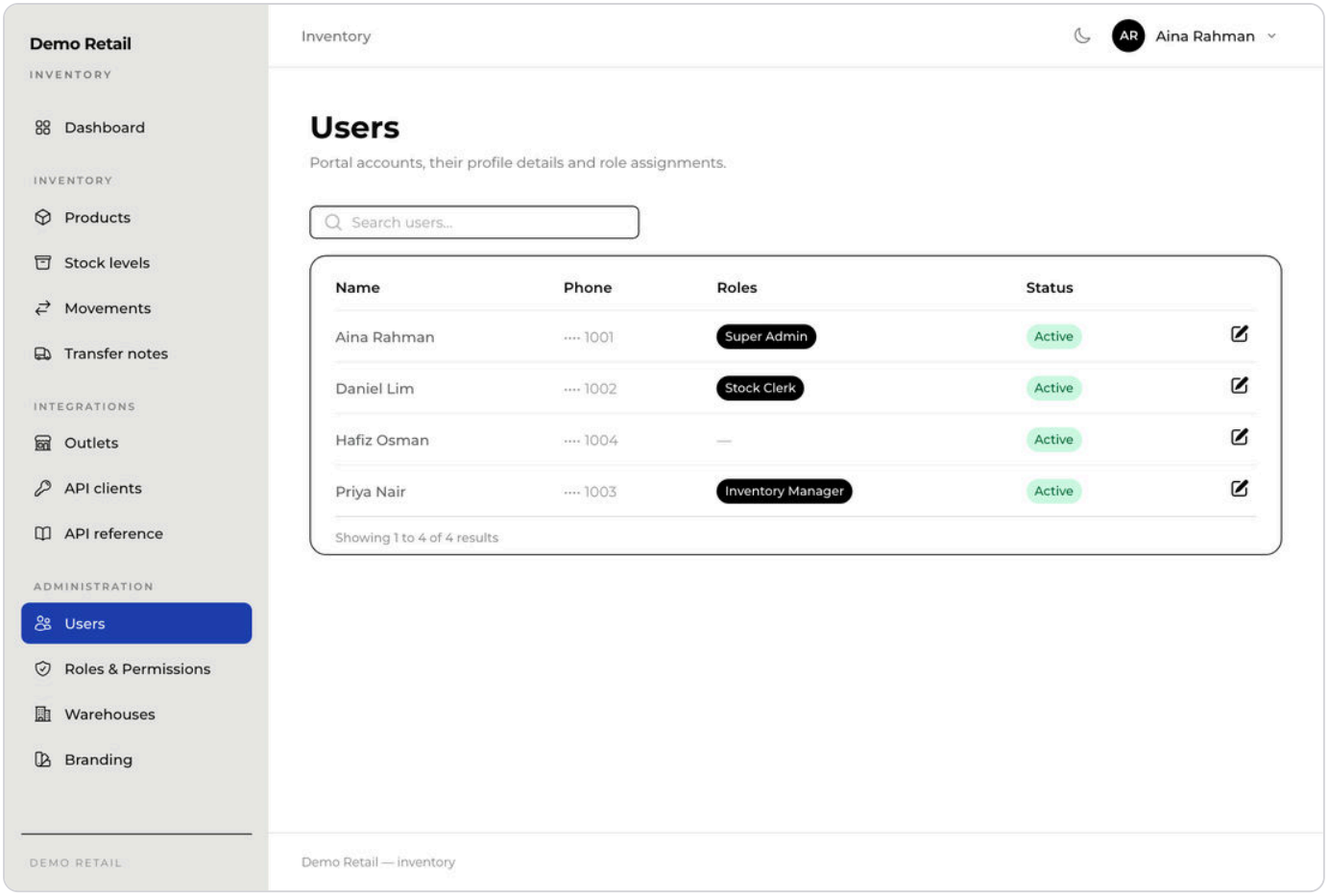
Give someone access

For: Administrators

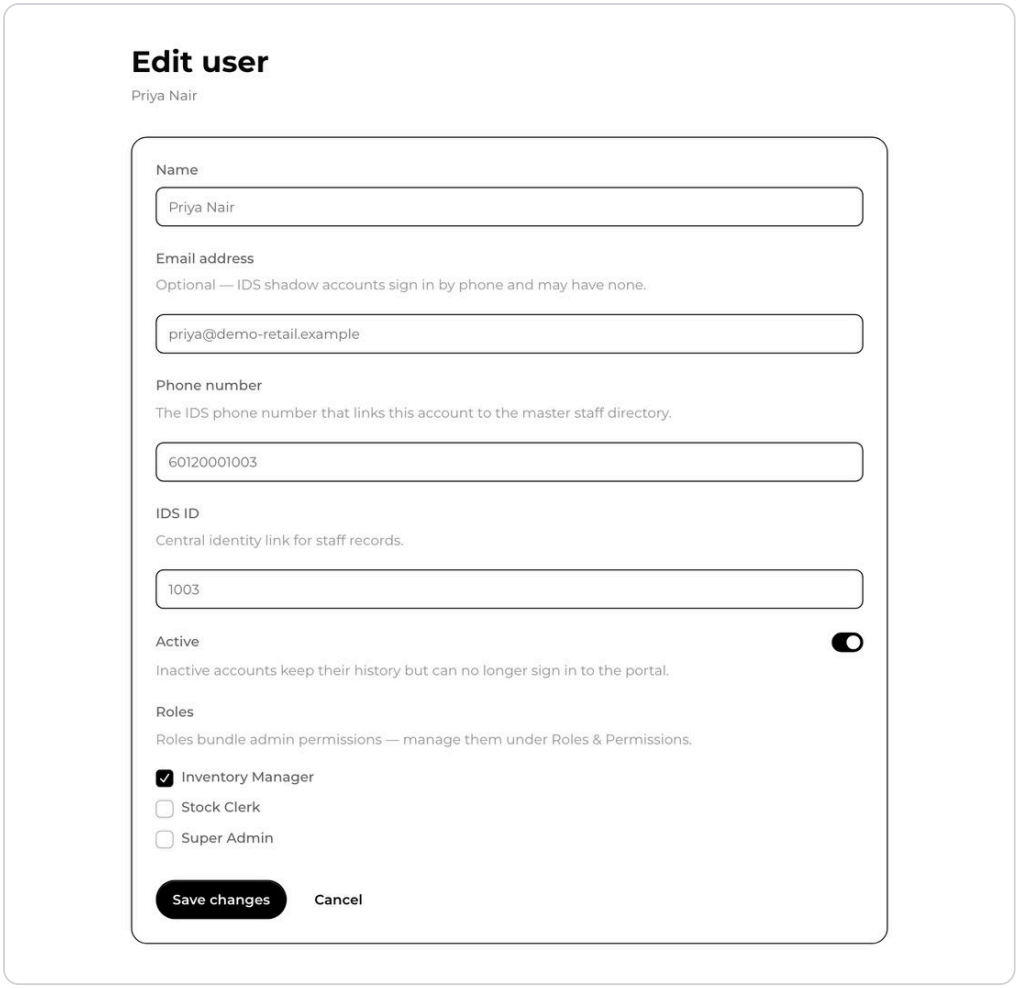
Staff sign in with the company's shared sign-in. The first time, they see "No access yet" until you give them a role.



1. Open **Users** under **Administration** in the menu.



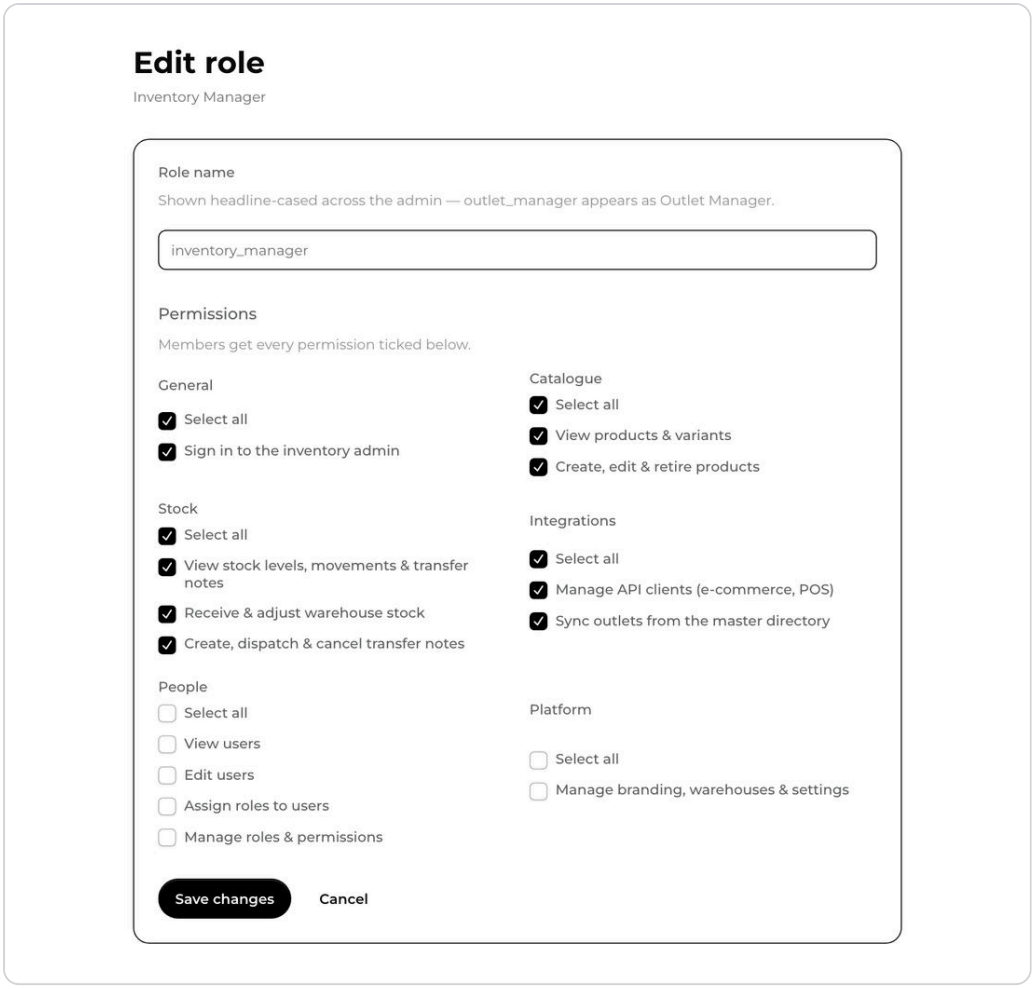
2. Press the pencil button at the end of the person's row.
3. Under **Roles**, tick one or more roles.
4. Press **Save changes**. The person refreshes the page and the menu appears.



To stop someone using Inventory, switch off **Active**. Their history stays.

Change what a role can do

1. Open **Roles & Permissions** under **Administration**.
2. Press the pencil button next to a role, or **New role**.
3. Tick what the role may do. Each line says it in words, for example **Receive & adjust warehouse stock** or **Create, dispatch & cancel transfer notes**.
4. Press **Save changes**.



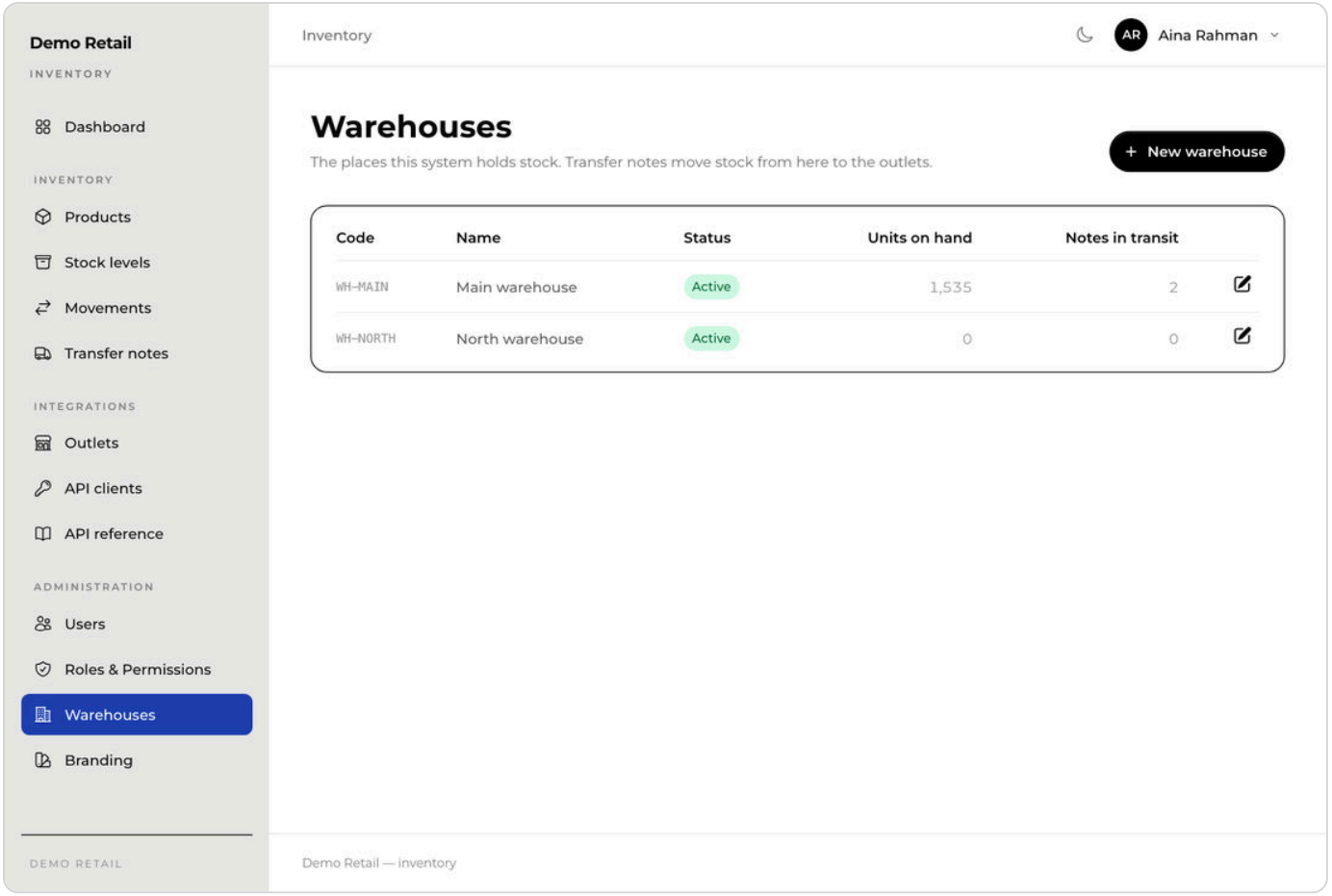
Every role needs **Sign in to the inventory admin** ticked, or its members still see "No access yet".

Warehouses and branding

For: Administrators

Warehouses

1. Open **Warehouses** under **Administration** in the menu. The list shows each warehouse's stock and how many notes are on the way from it.
2. Press **New warehouse**, and give it a **Code** and a **Name**.

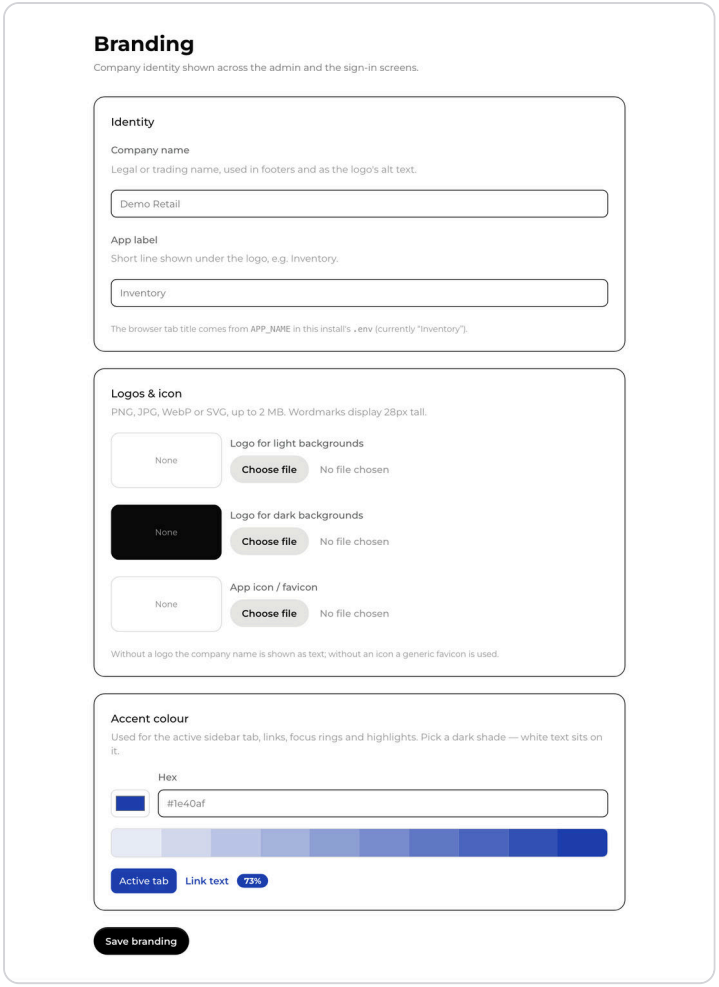


Branding

Branding sets the company name, logos and colour shown in the menu and on the sign-in page.

1. Open **Branding** under **Administration**.
2. Type the **Company name** and the **App label** shown under it.
3. Under **Logos & icon**, press **Choose file** to upload a logo. Without a logo, the company name is shown as text.
4. Pick an **Accent colour**. Choose a dark one: white text sits on it.

5. Press **Save branding**.



USER GUIDE · VERSION 1

E-commerce

Your online shop and the console behind it: take orders, pack and send them, handle returns and refunds, keep online stock honest, run promotions and look after the product catalogue.

1. What it is for
2. Sign in and find your way
3. Pack and send an order
4. Handle a return or a refund
5. Look up a customer
6. Clear the exceptions list
7. Keep online stock right
8. Read the reports
9. Run a promotion
10. Change products and categories
11. Edit the shop's pages
12. Shop settings
13. Give staff access

What it is for

For: Everyone

E-commerce is your company's online shop and the console your staff run it from. Customers browse, pay and choose delivery or collection at an outlet. Staff use the console to pack and send orders, handle returns and refunds, keep the stock that is sold online correct, run promotions, and look after products, categories and the shop's own pages.

Who uses it

Each person gets one or more roles. The console only shows what your role allows.

Role	What they do
Order Ops	Pack and send orders, answer quotation requests.
Customer Service	Orders, returns, and preparing refunds.
Finance	Approve refunds and pay them out, read the sales and payment reports.
Inventory Controller	Count stock and correct it.
Merchandiser	Products, prices and categories.
Marketing	Promotions and the shop's pages.
Administrator	Settings, staff access, and most of the above.

Some pairs are kept apart on purpose. An Administrator, Merchandiser or Marketing person can never correct stock, and Finance can never create a promotion. Nobody can approve a refund they prepared.

What it needs from other systems

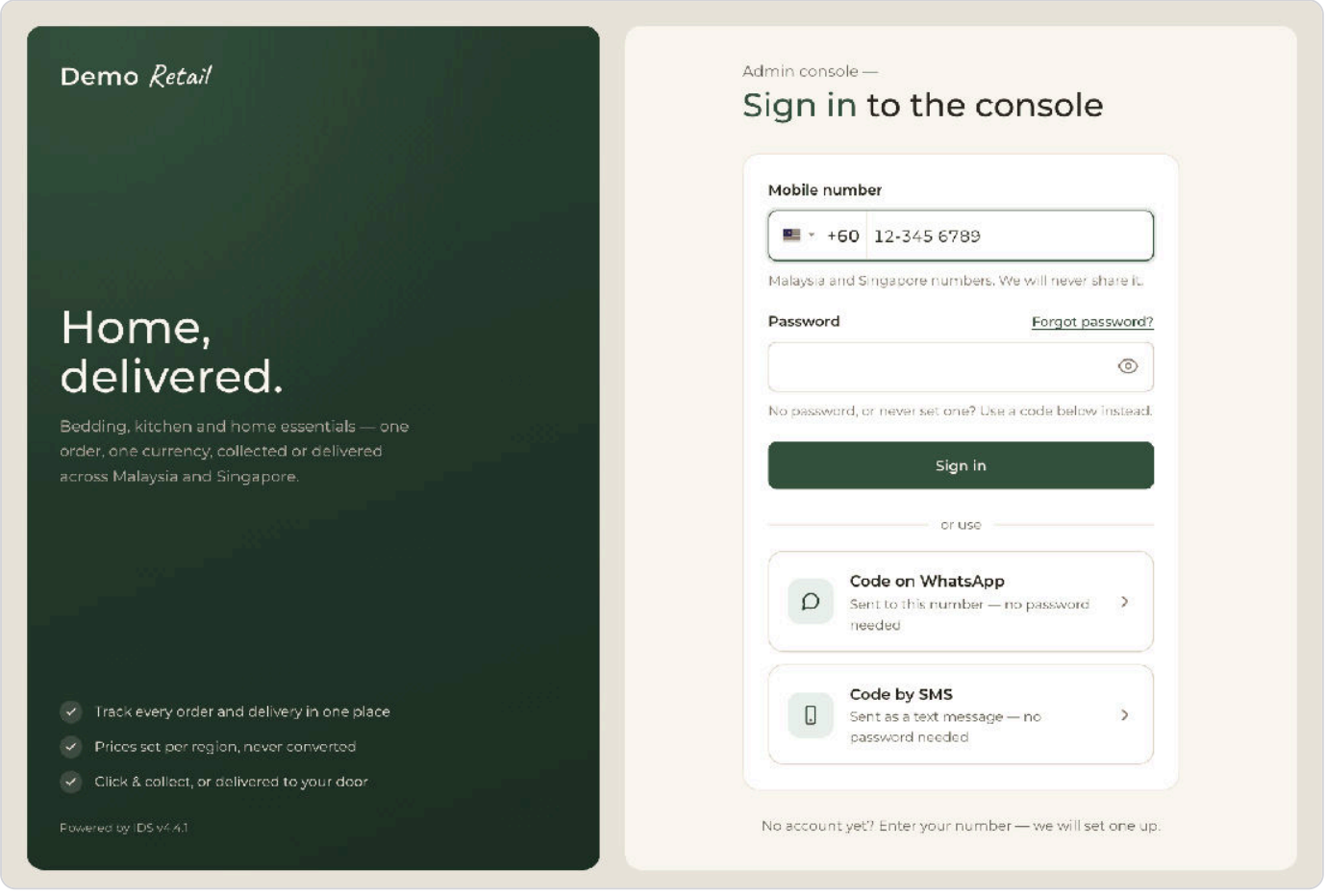
- Staff and customers sign in with your company's shared sign-in account (IDS). The console does not create or edit those accounts.
- Card, FPX and DuitNow payments go through the payment provider; courier bookings go through EasyParcel when live courier rates are switched on.
- Stock counts from outlets and the warehouse feed the stock figures.

E-COMMERCE

Sign in and find your way

For: Everyone

1. Open the console's address, which ends in **/admin**. If you are not signed in, the sign-in page opens.
2. Under **Mobile number**, check the country code shows **+60** (Malaysia) or **+65** (Singapore), then type your number.
3. Type your **Password** and press **Sign in**. No password? Press **Code on WhatsApp** or **Code by SMS** and type the code you receive.



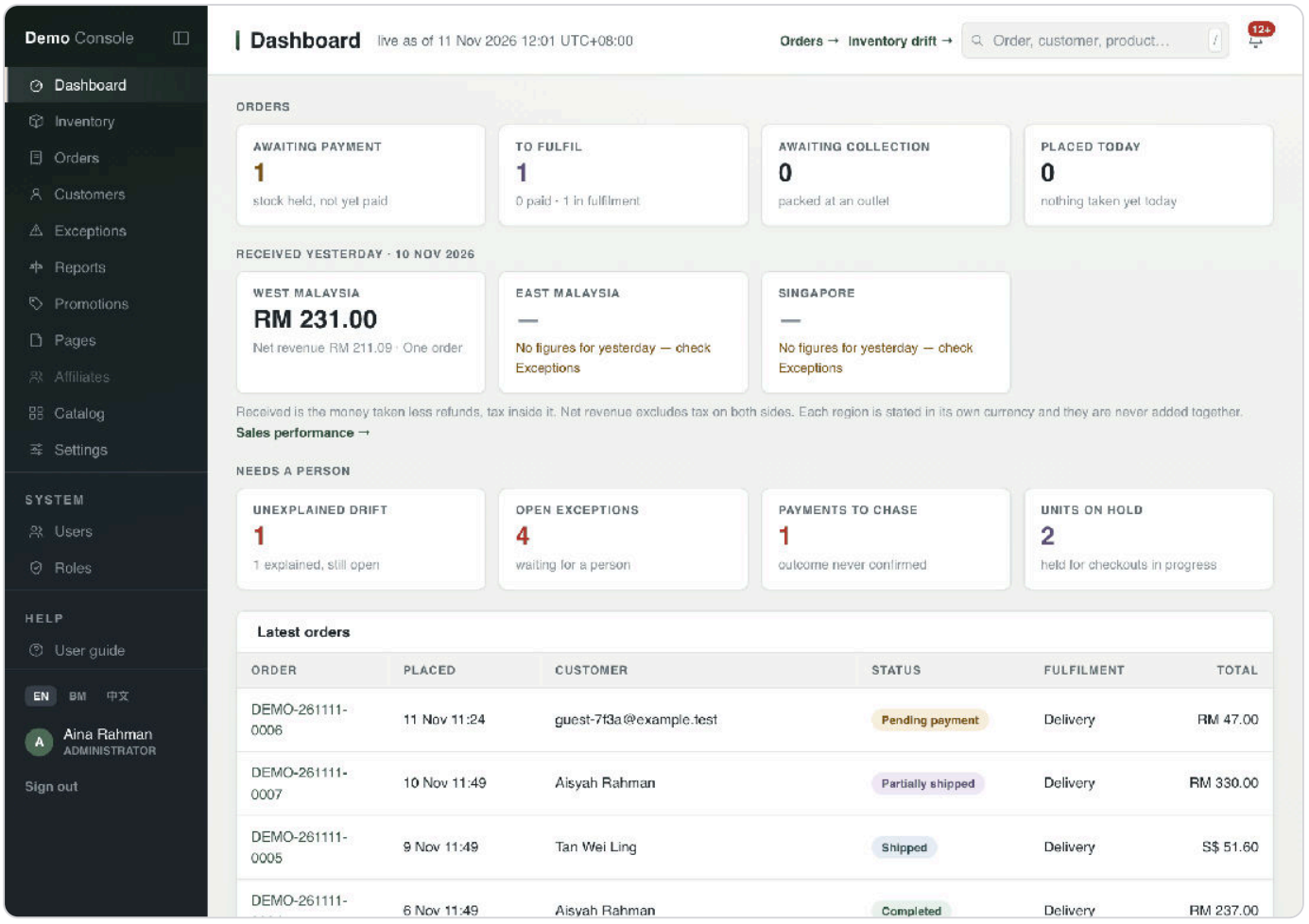
Signing in does not give you access by itself. If you see a message saying your account has no admin console access, ask an administrator to give you a role.

The menu and the dashboard

The dark menu on the left is the same on every screen: **Dashboard**, **Inventory**, **Orders**, **Customers**, **Exceptions**, **Reports**, **Promotions**, **Pages**, **Catalog** and **Settings**. **Affiliates** is greyed out because it is not built yet. **Users** and **Roles** appear only for administrators.

The **Dashboard** opens first. Each box links to the screen where that work is done:

- **Orders**: awaiting payment, to fulfil, awaiting collection, placed today.
- **Received yesterday**: money taken yesterday per region, less refunds. If a box says **No figures for yesterday**, the overnight figures did not run; check **Exceptions**.
- **Needs a person**: stock differences nobody has explained, open exceptions, payments with no confirmed result, and units held for customers who are paying right now.
- **Latest orders**: the newest orders, with a link to all of them.



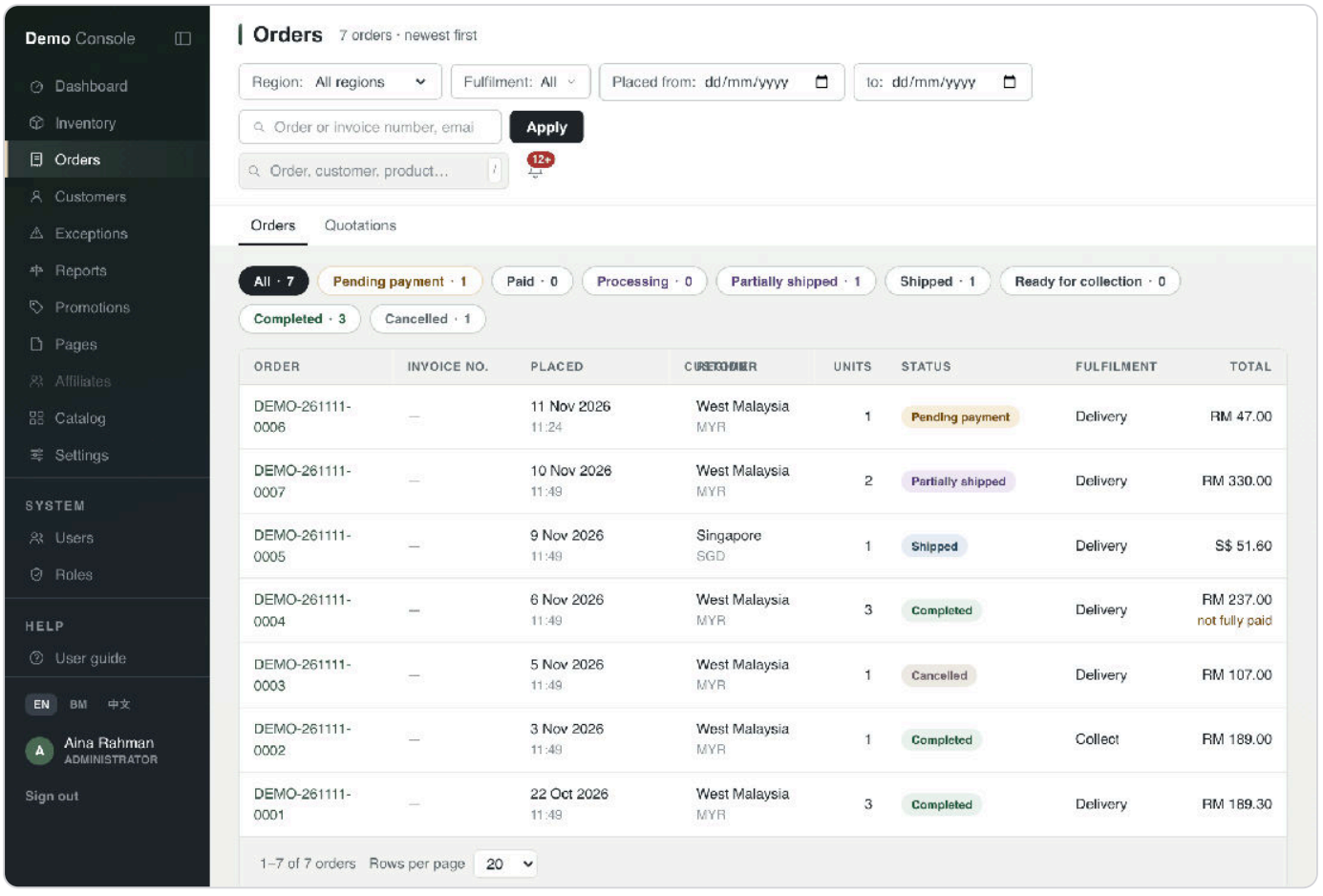
Your name at the bottom of the menu opens **Your account**, where you change your display name, email address, password and language. **EN**, **BM** and **中文** switch the console's language.

E-COMMERCE

Pack and send an order

For: Order Ops, Customer Service

1. Open **Orders** in the menu. The pills at the top count orders in each status: **Pending payment**, **Paid**, **Processing**, **Partially shipped**, **Shipped**, **Ready for collection**, **Completed** and **Cancelled**.
2. To narrow the list, pick a **Region**, a **Fulfilment** type or dates, or type the start of an order number, invoice number, email address or phone number, then press **Apply**. Searching by customer name does not work.
3. Click an order number to open it.

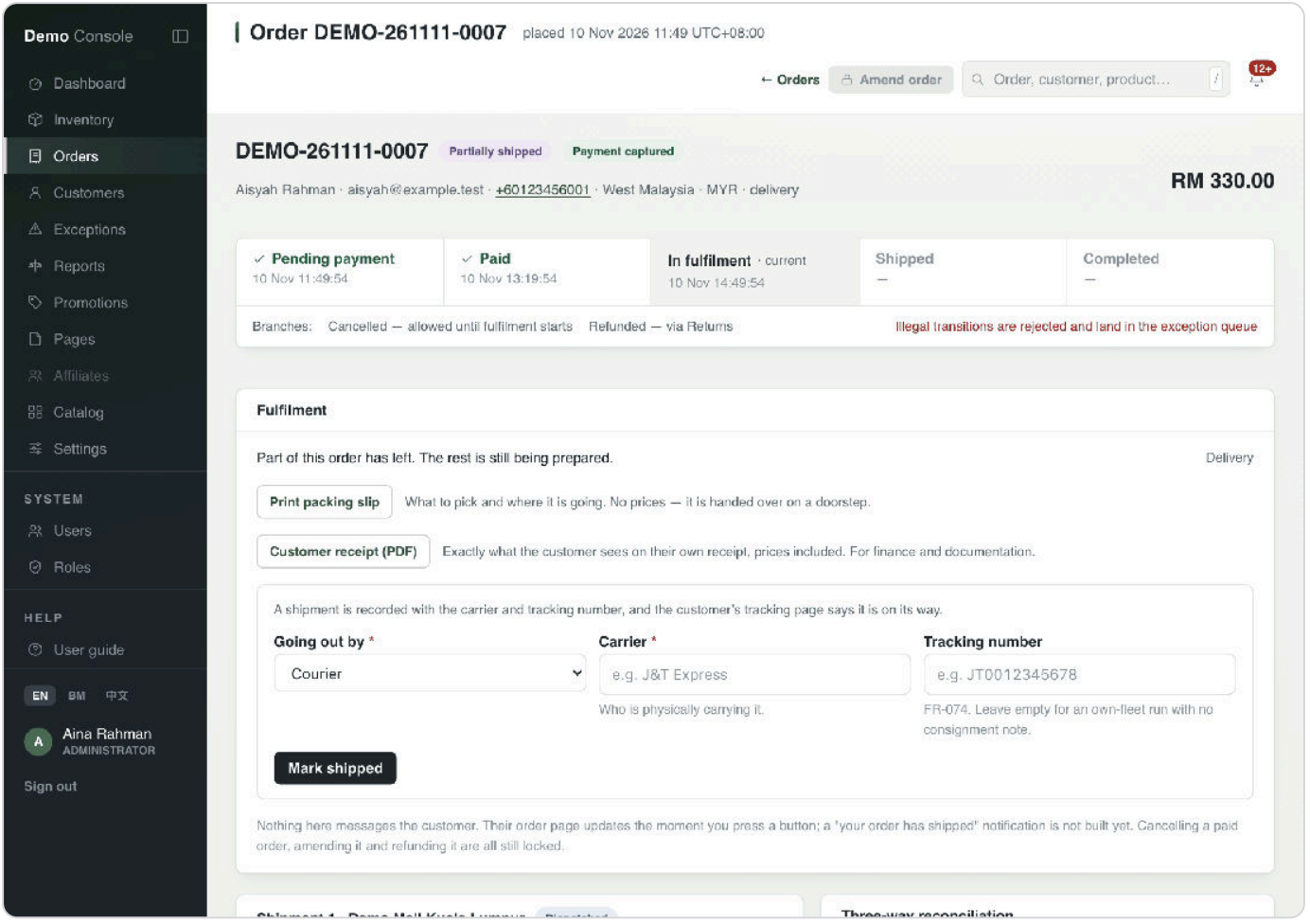


The bar across the top of an order shows where it is: **Pending payment**, **Paid**, **In fulfilment**, **Shipped**, **Completed**.

Send it

1. You do not press anything to move an order out of **Pending payment**. Packing starts by itself once the payment comes through.

2. Press **Print packing slip** for the picker. It lists what to pick and where it goes, with no prices.
3. Press **Start preparing** once the items are being picked.
4. For a delivery, choose **Going out by** (**Courier** or **Own fleet**), type the **Carrier** and the **Tracking number**, then press **Mark shipped**. Leave the tracking number empty for an own-fleet run with no consignment note.
5. For click-and-collect, press **Mark ready for collection** instead. When the customer picks it up, fill in **Who collected it** and press **Mark collected**.
6. When a delivery arrives, press **Mark delivered**. The order is then **Completed**, and anything after that is a return.



An order sent from two places shows one shipment per place, each with its own status.

Good to know

- Nothing on this page messages the customer. Their own order page updates the moment you press a button, but a "your order has shipped" message is not built yet.

- **Amend order** is locked: changing what is on a placed order is not built yet. Cancelling a paid order is also locked.
- **Customer receipt (PDF)** is the same receipt the customer sees, with prices.

Quotation requests

The **Quotations** tab next to **Orders** lists customers who asked for a price from a product page. Reply to the customer yourself, then mark the request answered. Marking it answered sends nothing.

E-COMMERCE

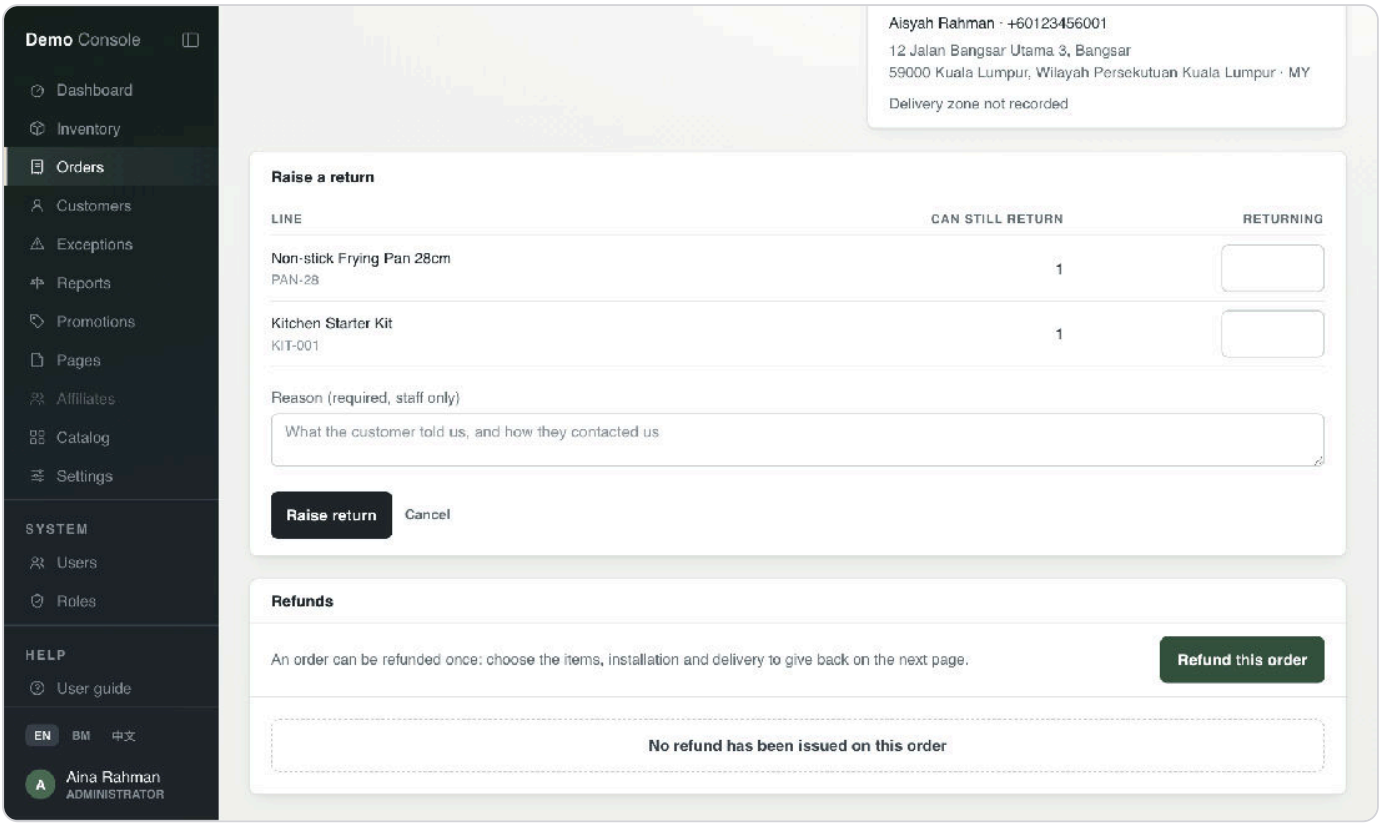
Handle a return or a refund

For: Customer Service, Finance

Raise a return

When a customer wants to send something back:

1. Open the order and scroll down to the return section. Press **Raise a return**.
2. Under **Returning**, type how many of each item is coming back. **Can still return** shows the most you can enter.
3. In **Reason (required, staff only)**, write what the customer told you and how they contacted you.
4. Press **Raise return**.



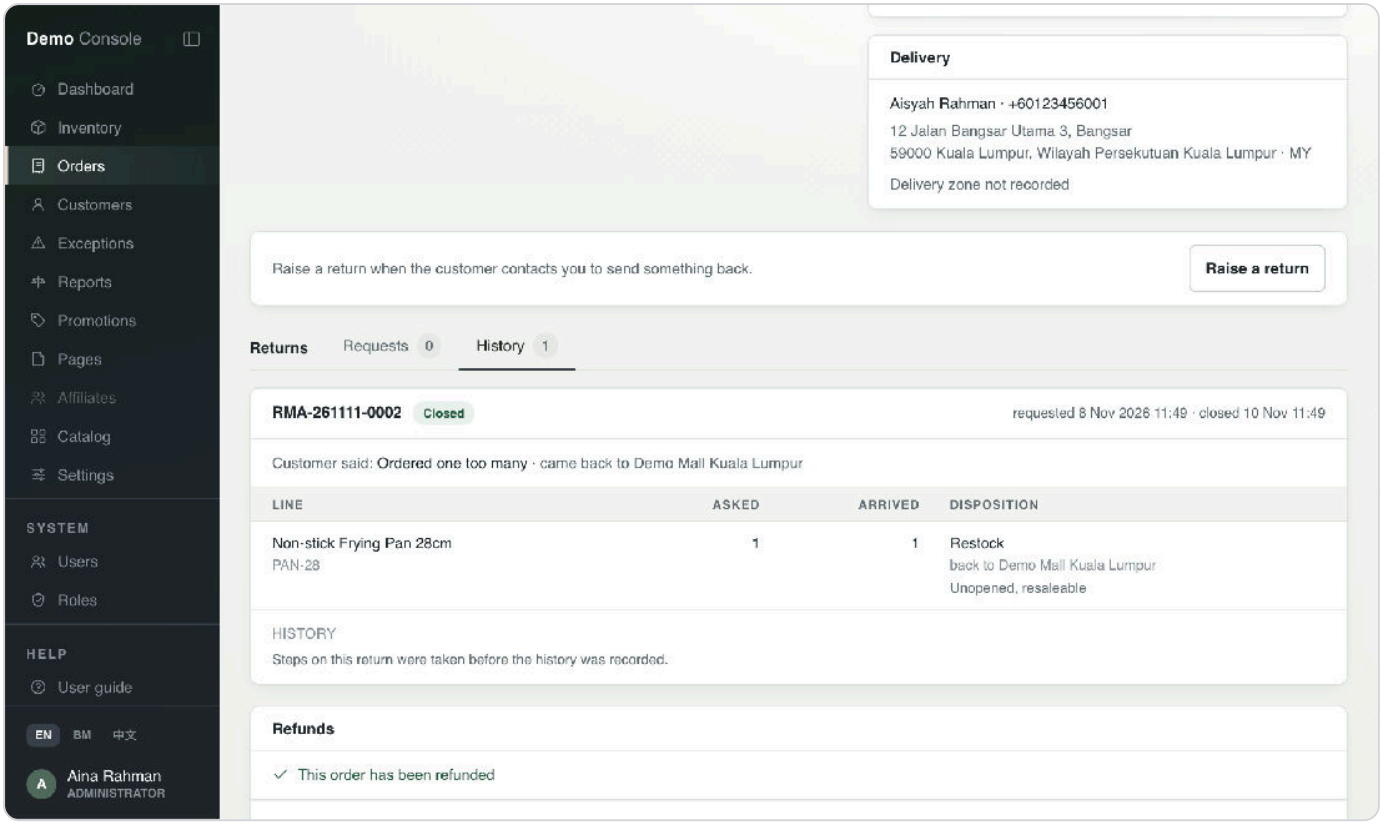
Move the return along

The return appears under **Returns** on the order. Each step has its own button:

1. **Approve** or **Reject** the request.
2. When the parcel arrives, choose the outlet or warehouse it arrived at and press **Mark received**.

3. Record what condition each item is in and where it goes (back on the shelf, or nowhere), then press **Record inspection**.
4. Press **Refund this return** to prepare the refund, or **Close return** if no money goes back.

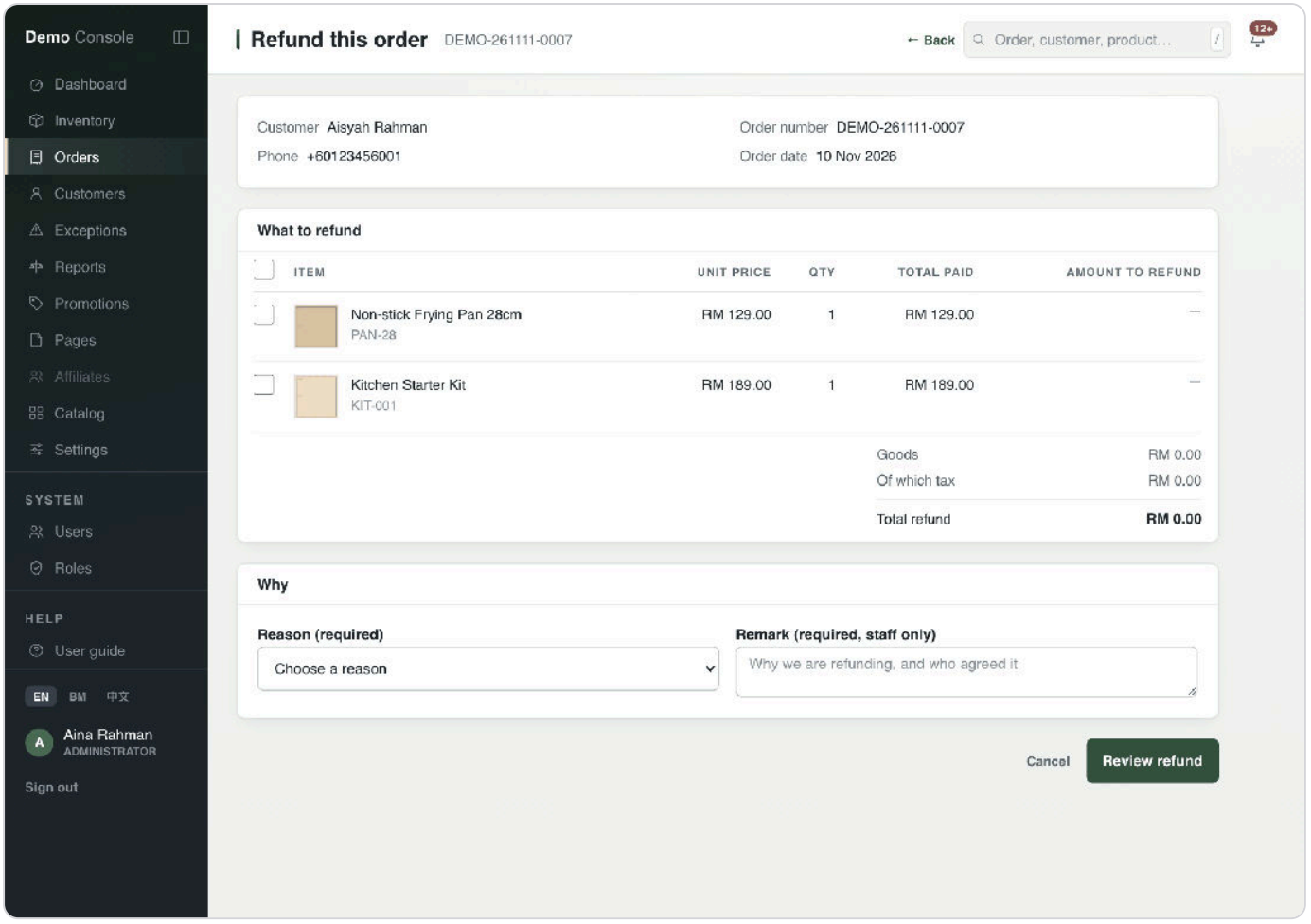
A closed return moves to the **History** tab, with what was asked for, what arrived and what happened to it.



Refund an order

An order can be refunded once. Use this for a cancellation, a price adjustment, goodwill or a delivery that failed.

1. On the order, press **Refund this order**.
2. Tick the items to refund. The total updates as you tick.
3. Choose a **Reason (required)** and write a **Remark (required, staff only)**: why you are refunding and who agreed to it.
4. Press **Review refund**, check the figures, then press **Submit for approval**.



Who approves and pays

A prepared refund pays nothing yet.

1. **Finance** opens the order and presses **Review and approve**, then **Approve refund** (or **Reject refund**). The refund then shows **Approved, payout not sent**.
2. Someone allowed to send payouts (Customer Service, Finance or an Administrator) presses **Send payout**. This pays through the payment provider or records a bank transfer made by hand.

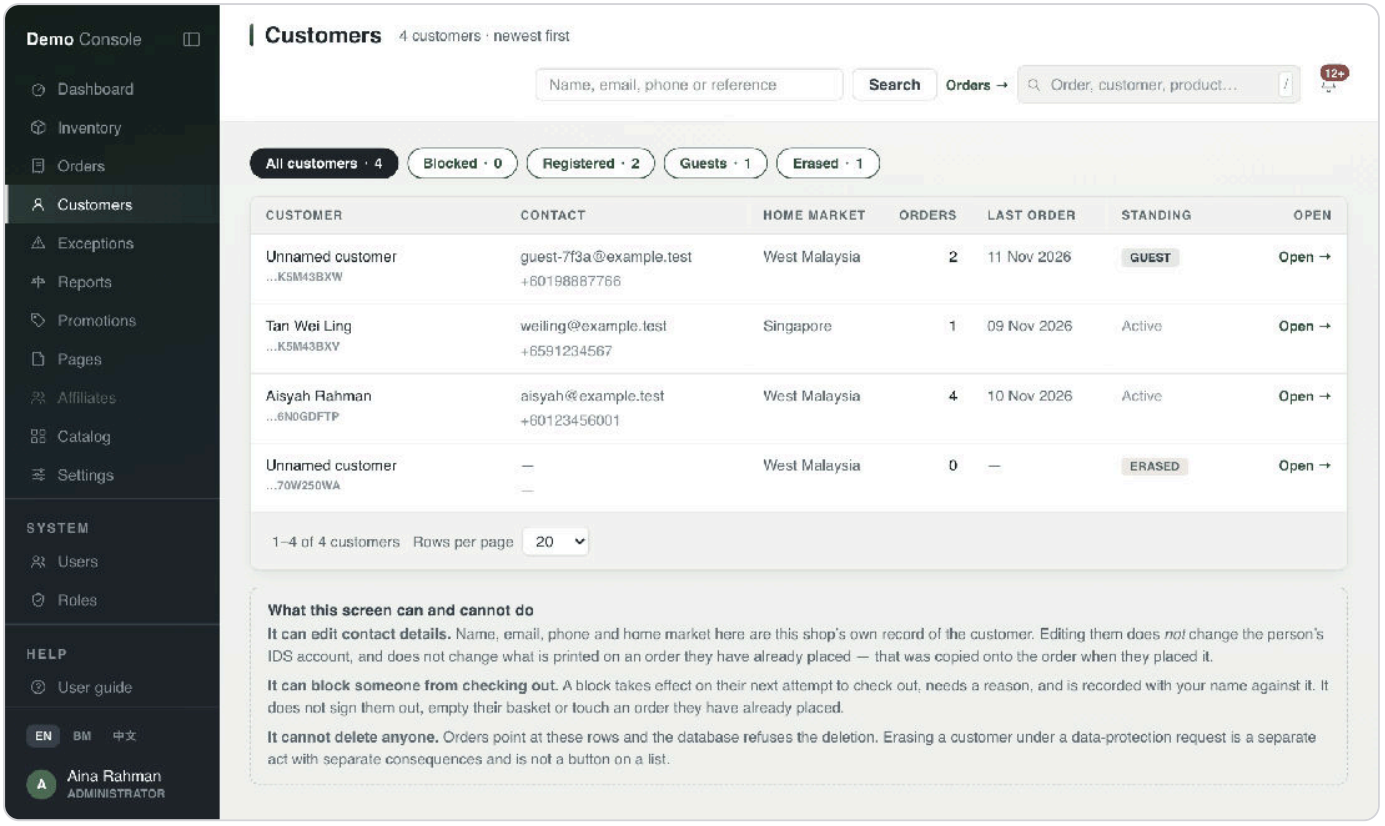
Nobody can approve a refund they prepared themselves.

E-COMMERCE

Look up a customer

For: Customer Service, Order Ops

1. Open **Customers** in the menu.
2. Type a name, email address, phone number or customer reference and press **Search**. The pills split **Registered** accounts, **Guests** (bought without an account), **Blocked** and **Erased** customers.
3. Press **Open →** on a row.



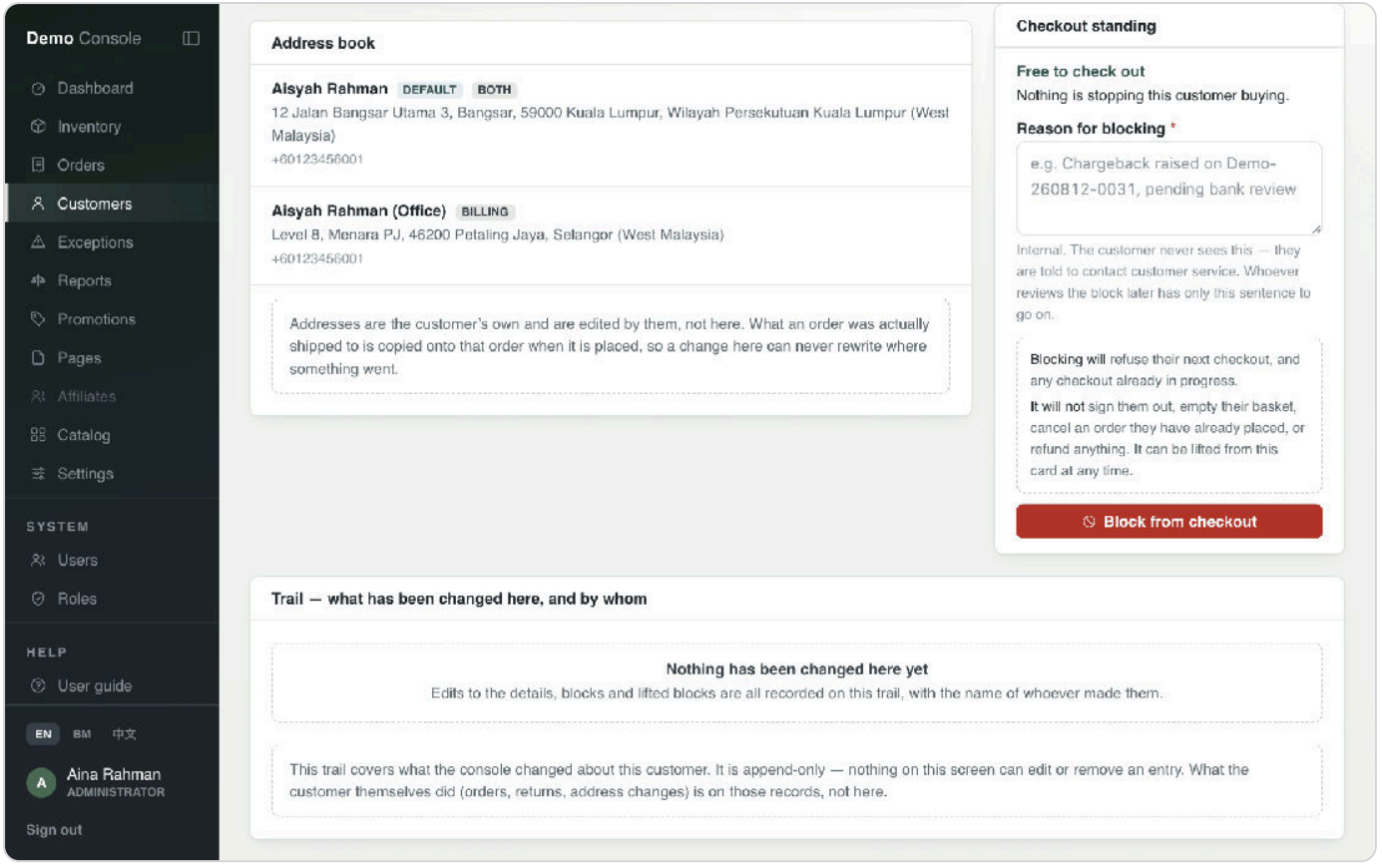
The customer page shows how much they have spent, their recent orders, their saved addresses and how to reach them.

- **Edit details** changes the name, email, phone and home market in this shop's records only. It does not change their sign-in account or any order already placed.
- Addresses are the customer's own. They change them from their account page or at checkout, not here.

Stop someone from checking out

1. On the customer page, find **Checkout standing**.

2. Type a **Reason for blocking**. The customer never sees it; they are told to contact customer service.
3. Press **Block from checkout**.



A block refuses their next checkout and any checkout already in progress. It does not sign them out, empty their basket, cancel an order or refund anything. You can lift it from the same card. Every edit, block and lifted block is written to the **Trail** with the name of whoever did it, and nobody can change the trail.

Customers cannot be deleted from this screen.

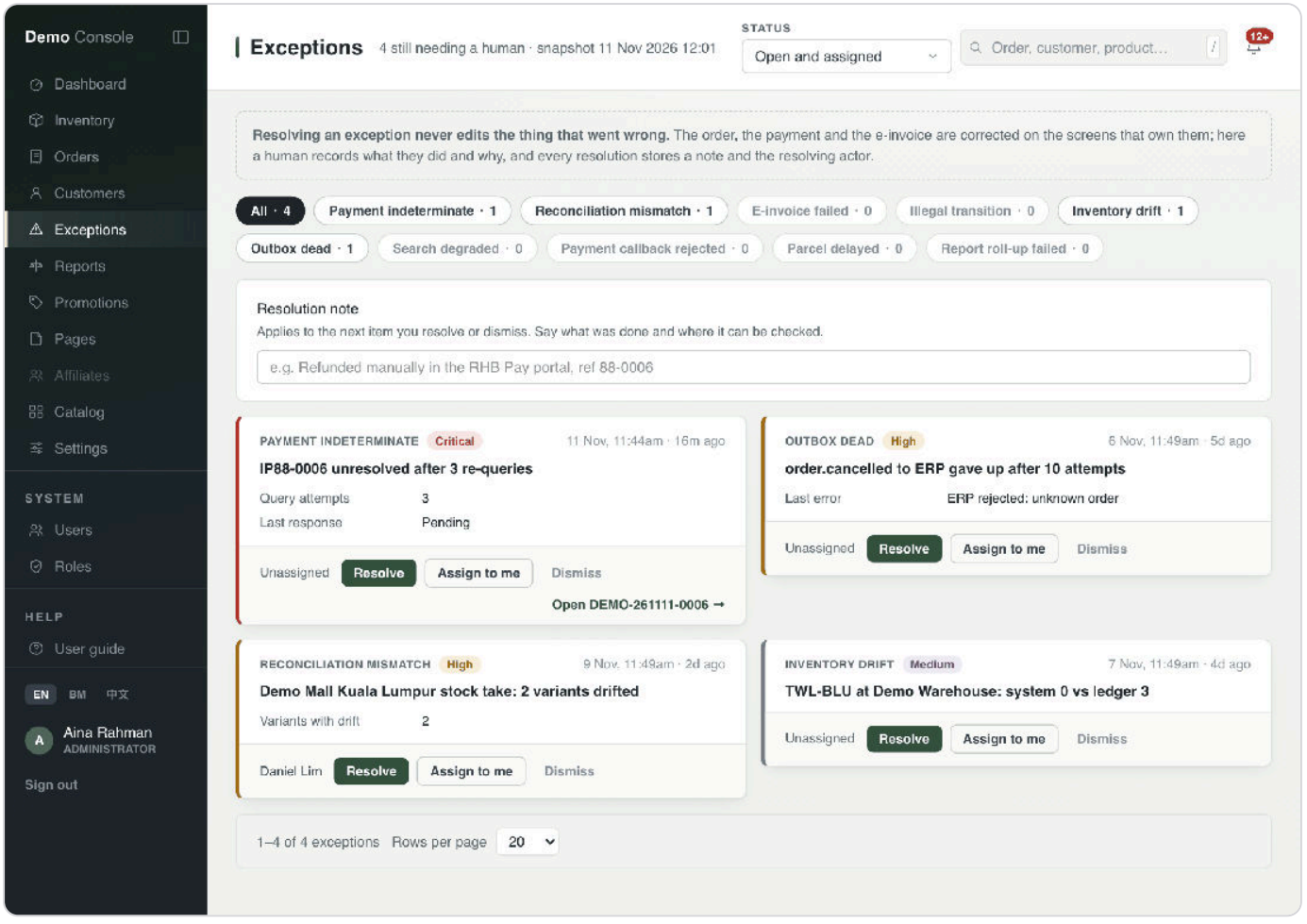
E-COMMERCE

Clear the exceptions list

For: Everyone

Exceptions lists the things the system could not settle by itself, for example a payment with no confirmed result, a payment that does not match the order, an e-invoice that failed, a stock difference, or a message to another system that kept failing. The red number on **Exceptions** in the menu is how many are waiting.

1. Open **Exceptions** in the menu. Each card names the problem, how serious it is, and the last thing the system tried.
2. Press **Assign to me** so colleagues can see you are on it.
3. Fix the actual problem on its own screen: the order, the payment, the stock. Resolving an exception never changes the order or payment itself.
4. Type a **Resolution note**: what you did and where someone can check it.
5. Press **Resolve**. Use **Dismiss** only when nothing needed doing.



The resolution note applies to the next card you resolve or dismiss, so type it right before you press the button.

E-COMMERCE

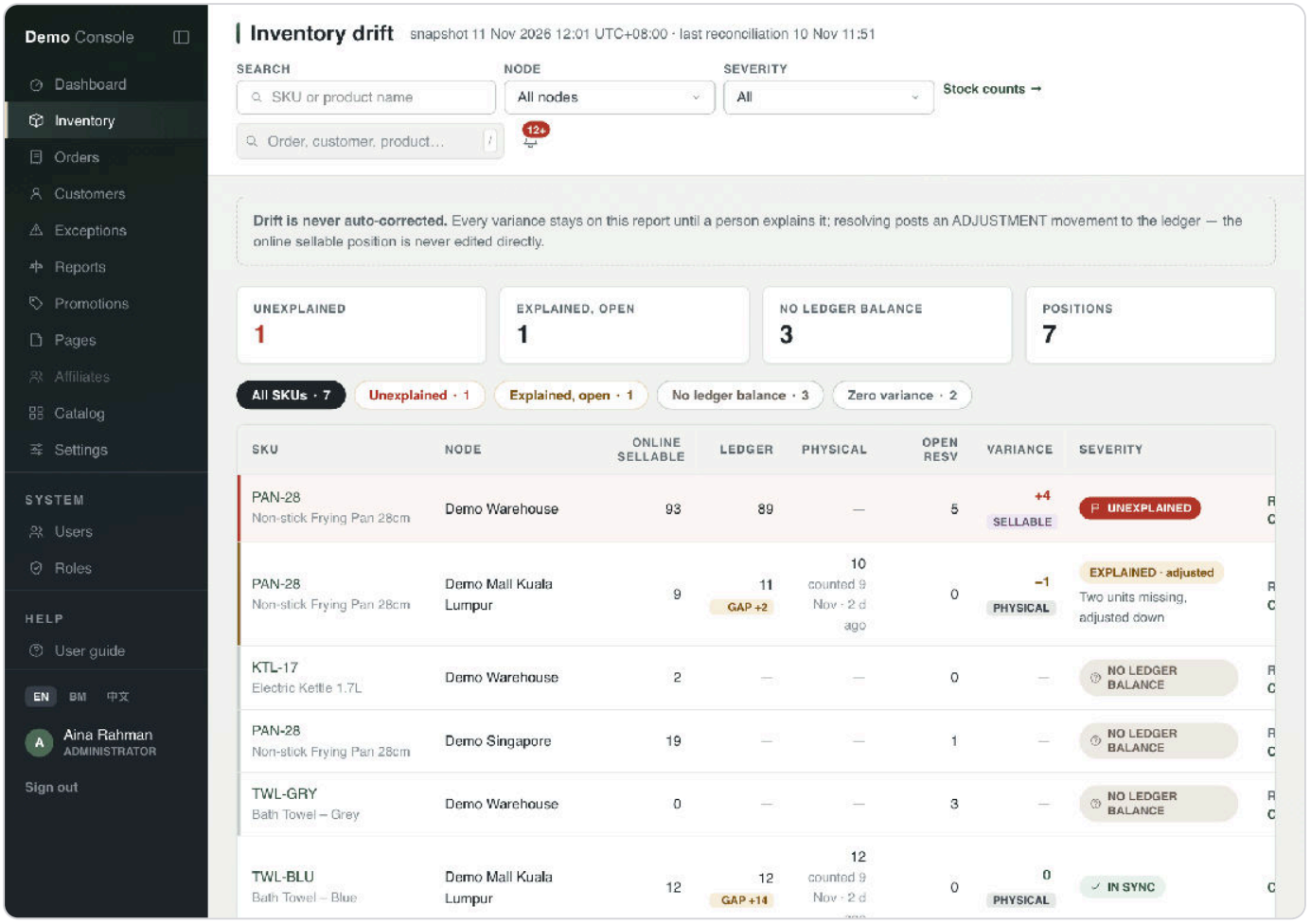
Keep online stock right

For: Inventory Controller

The shop never corrects stock by itself. When the stock records and a count disagree, the difference stays on a list until a person explains it.

See the differences

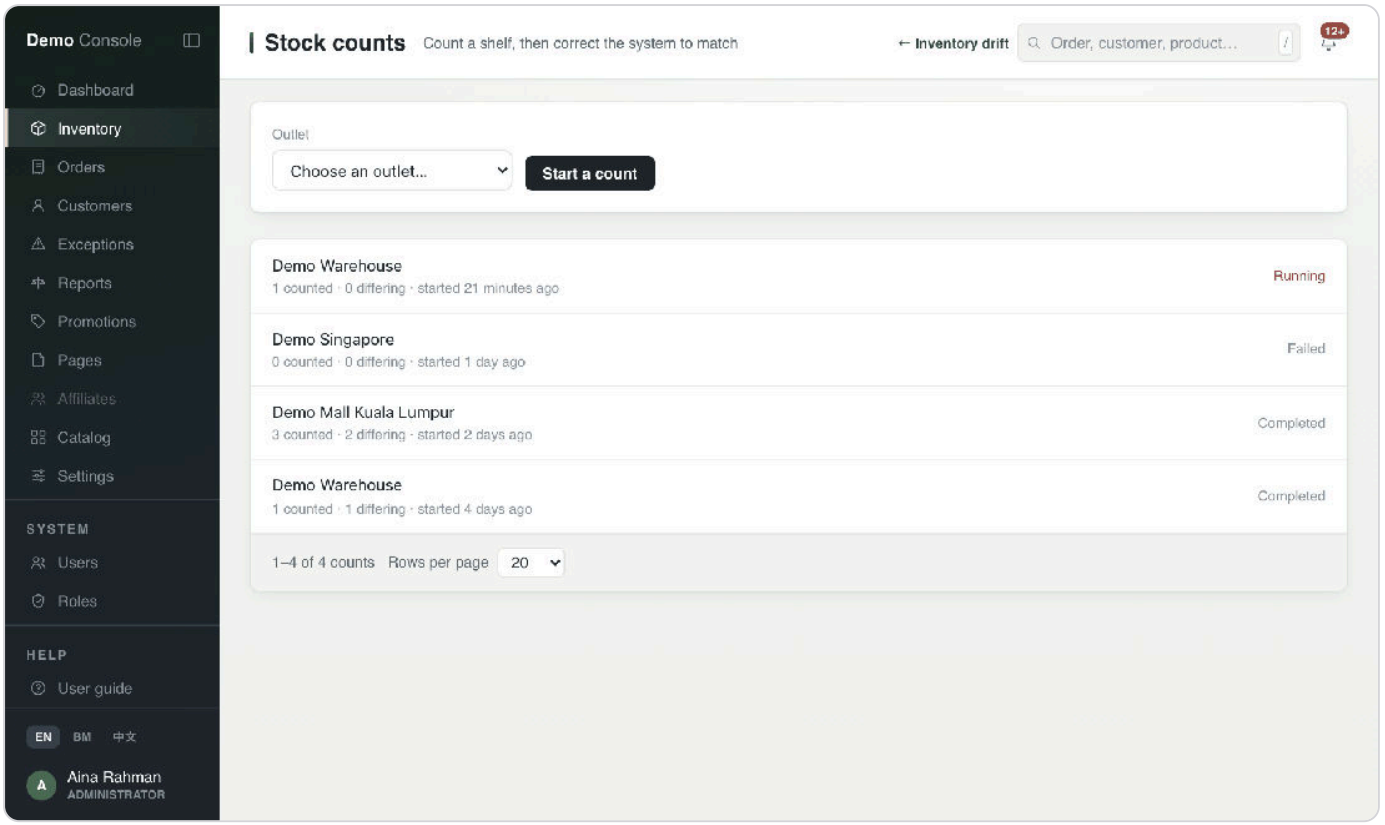
1. Open **Inventory** in the menu. The page is called **Inventory drift**.
2. The boxes at the top count **Unexplained** differences, ones **Explained, open**, and items with **No ledger balance** (no stock record to compare against, which is not the same as no difference).
3. Each row shows a product at one outlet or warehouse: **Online sellable** (what the shop may sell now), **Ledger** (the stock record), **Physical** (the last count), and the **Variance** between them.
4. Press **Resolve** on a row and type why the numbers differ. This writes a correction to the stock record. Press **Count this** to count that product instead.



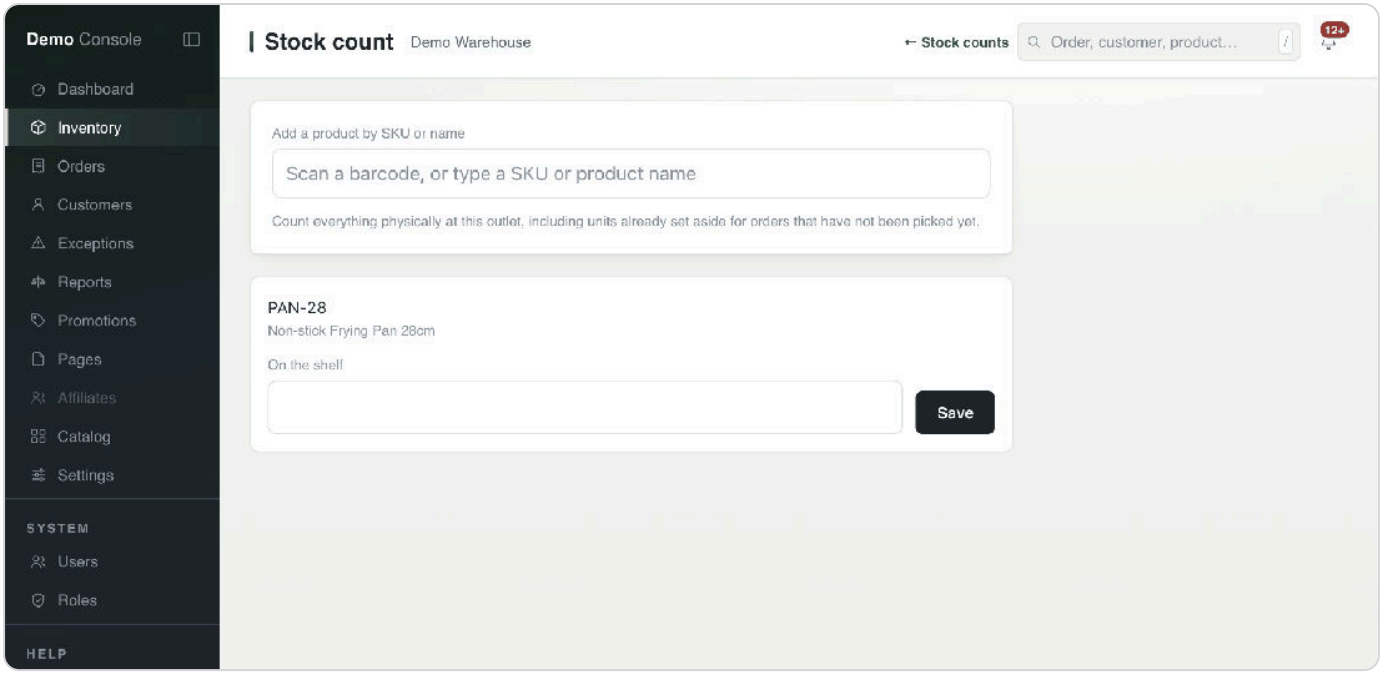
Only an **Inventory Controller** can resolve a difference. Administrators, Merchandisers and Marketing are never allowed to, even though they can see the list.

Count stock

1. On **Inventory drift**, press **Stock counts →**.
2. Choose the **Outlet** and press **Start a count**. Past counts are listed below with how many products were counted and how many differed.



3. Scan a barcode, or type a SKU (the code for one product) or a product name.
4. Under **On the shelf**, type how many are physically there, including units already set aside for orders not yet picked. Press **Save**.

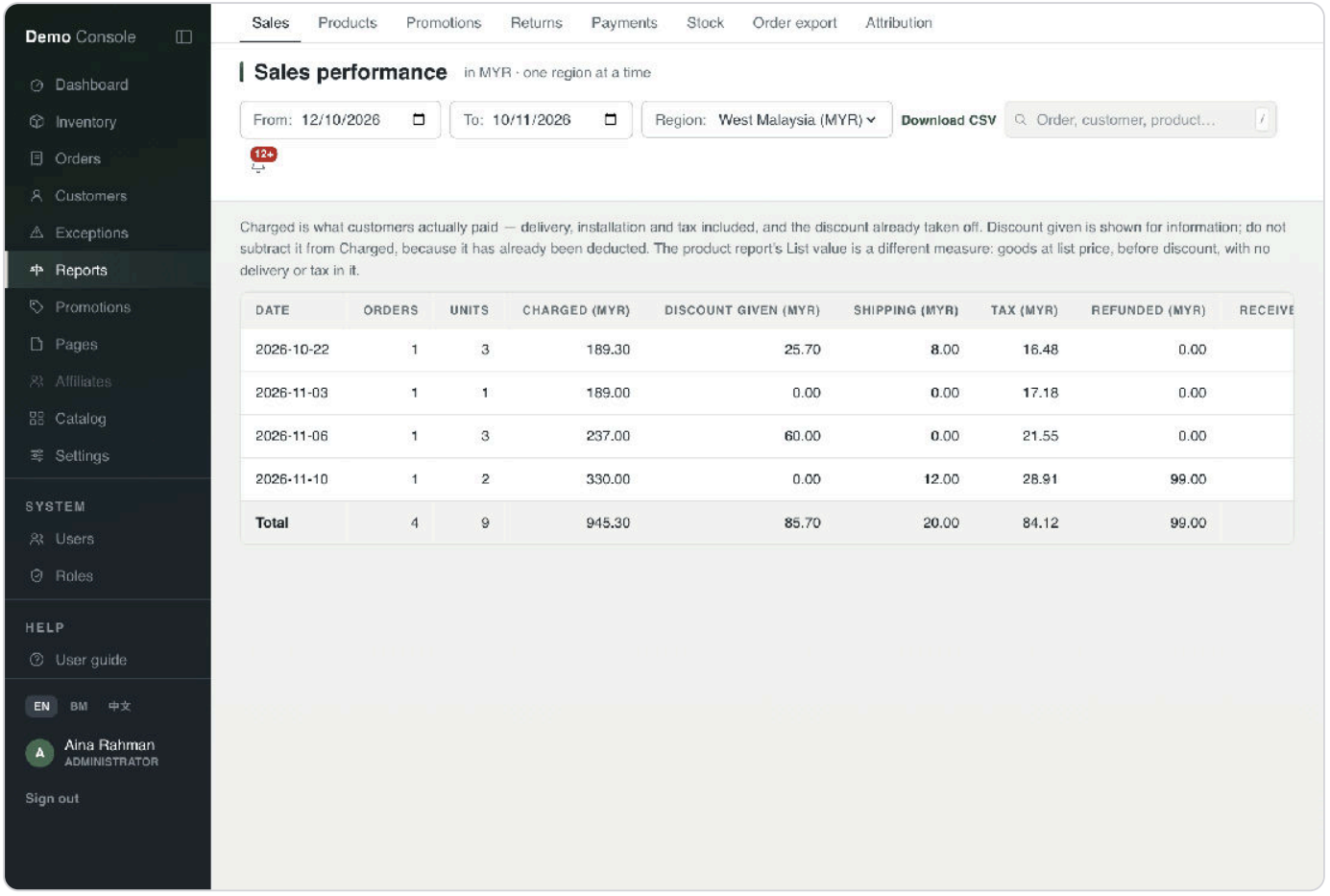

Demo Console
Dashboard
Inventory
Orders
Customers
Exceptions
Reports
Promotions
Pages
Affiliates
Catalog
Settings
SYSTEM
Users
Roles
HELP
Stock count
Demo Warehouse
← Stock counts
Order, customer, product…
12+
Add a product by SKU or name
Scan a barcode, or type a SKU or product name
Count everything physically at this outlet, including units already set aside for orders that have not been picked yet.
PAN-28
Non-stick Frying Pan 28cm
On the shelf
Save

E-COMMERCE

Read the reports

For: Finance, Merchandiser, Marketing

1. Open **Reports** in the menu.
2. Pick a report from the tabs: **Sales**, **Products**, **Promotions**, **Returns**, **Payments**, **Stock**, **Order export** or **Attribution** (where customers came from).
3. Choose the dates and one **Region**. Each region stays in its own currency; regions are never added together.
4. Press **Download CSV** for exactly what is on screen, to open in Excel.



Reading the sales report

- **Charged** is what customers paid: delivery, installation and tax included, with the discount already taken off. Do not subtract **Discount given** again.
- **Received** is the money taken less refunds.
- The figures are stored overnight at 02:00 for each day. A day with no row means nothing was sold, or the overnight figures did not run. If a message says **Some figures are missing**, check **Exceptions** before reading a gap as zero sales.

You only see the reports your role allows. For example, the sales and payment reports are for Finance and Administrators.

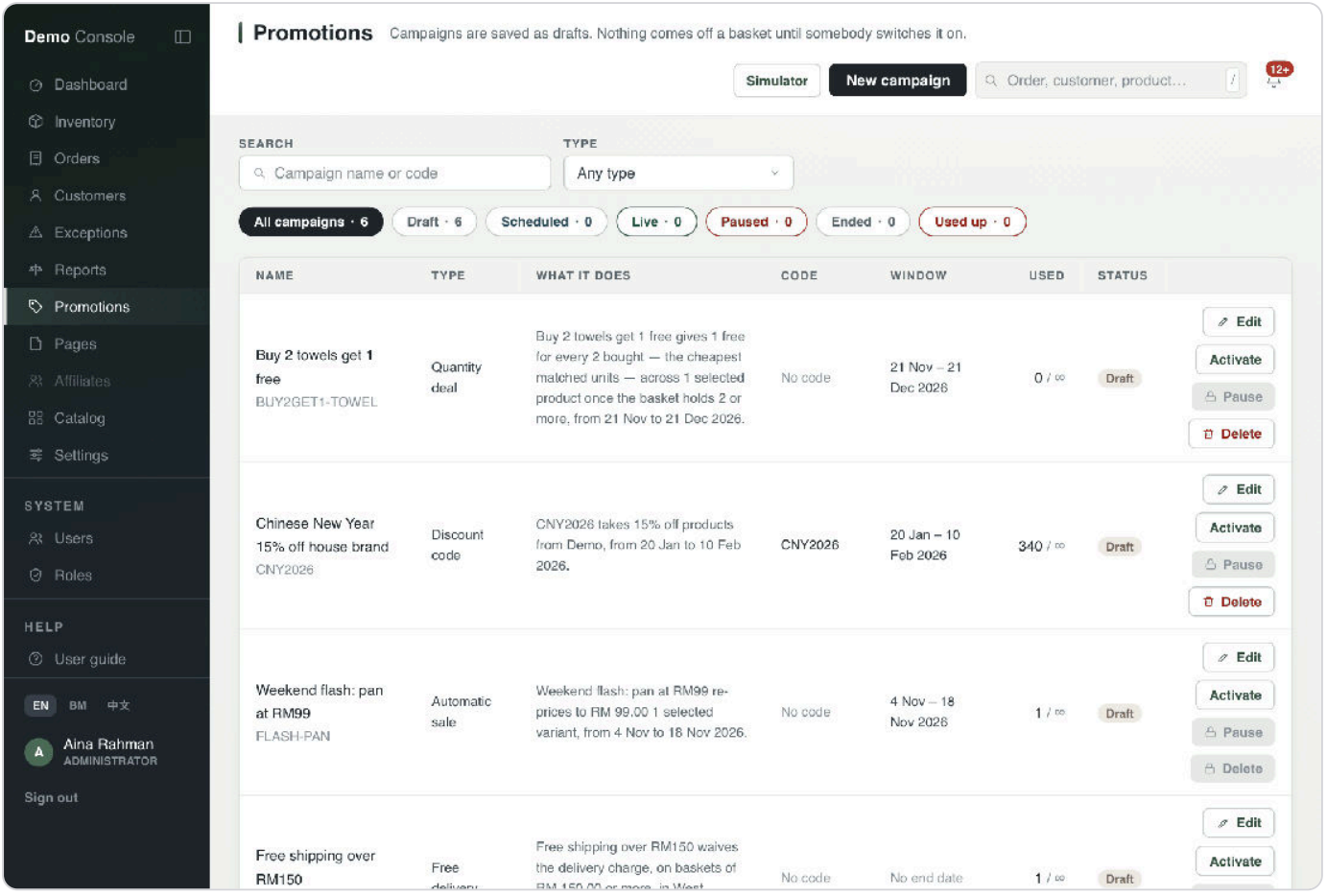
E-COMMERCE

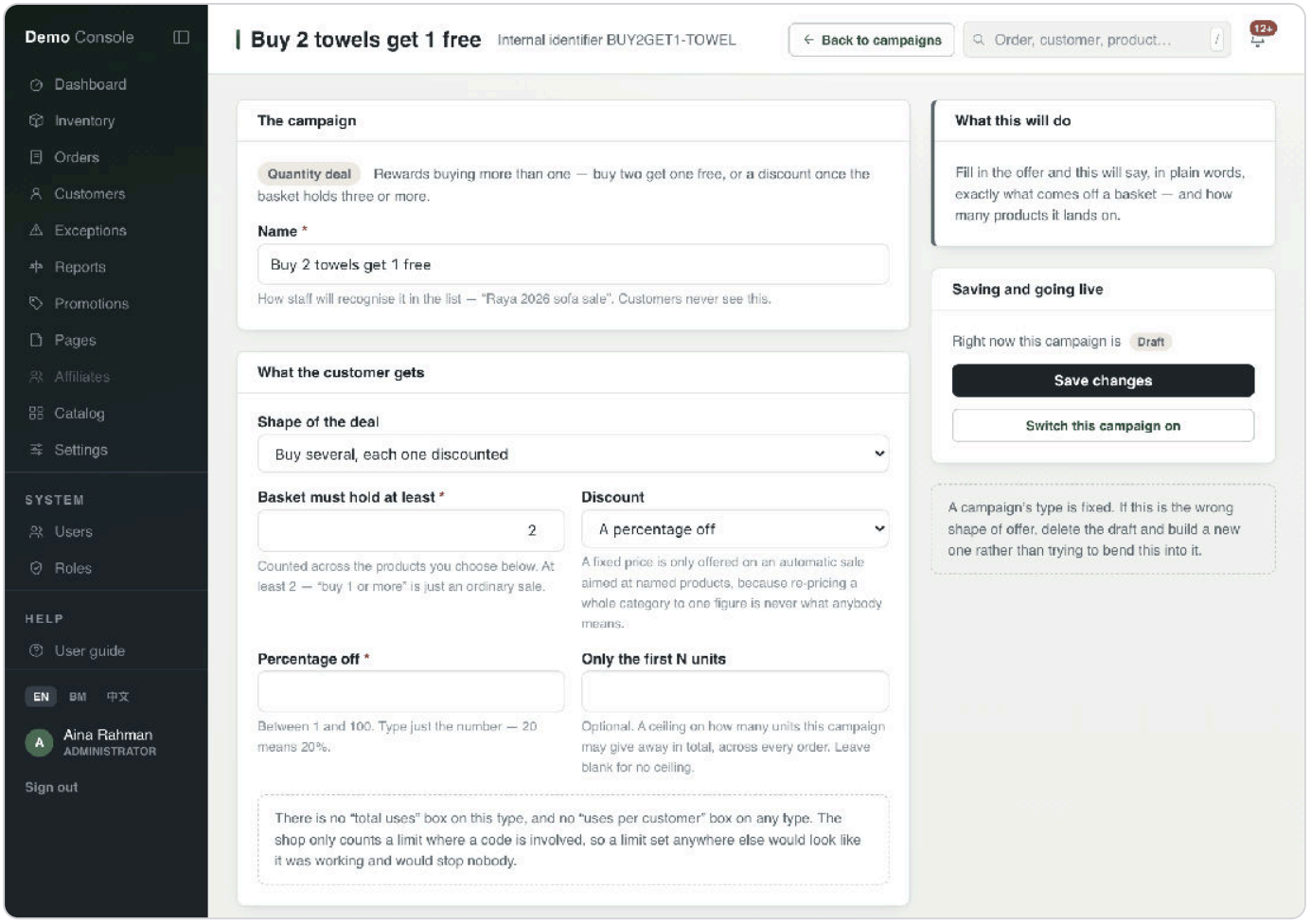
Run a promotion

For: Marketing

New campaigns are saved as drafts. Nothing comes off a customer's basket until someone switches the campaign on.

1. Open **Promotions** in the menu and press **New campaign**.
2. Under **What kind of campaign is this?**, pick **Discount code** (the customer types a code), **Automatic sale** (money comes off by itself), **Free delivery**, or **Quantity deal** (buy two get one free, or a discount once the basket holds several). You cannot change the kind later.
3. Fill in **The campaign**, **What the customer gets**, **What it applies to** and **When it runs**. Each field explains itself underneath. The **What this will do** box on the right says in plain words what will come off a basket.
4. Press **Save as draft** (or **Save changes** on a campaign you are editing). The campaign stays a draft.
5. When it should start, press **Switch this campaign on**.





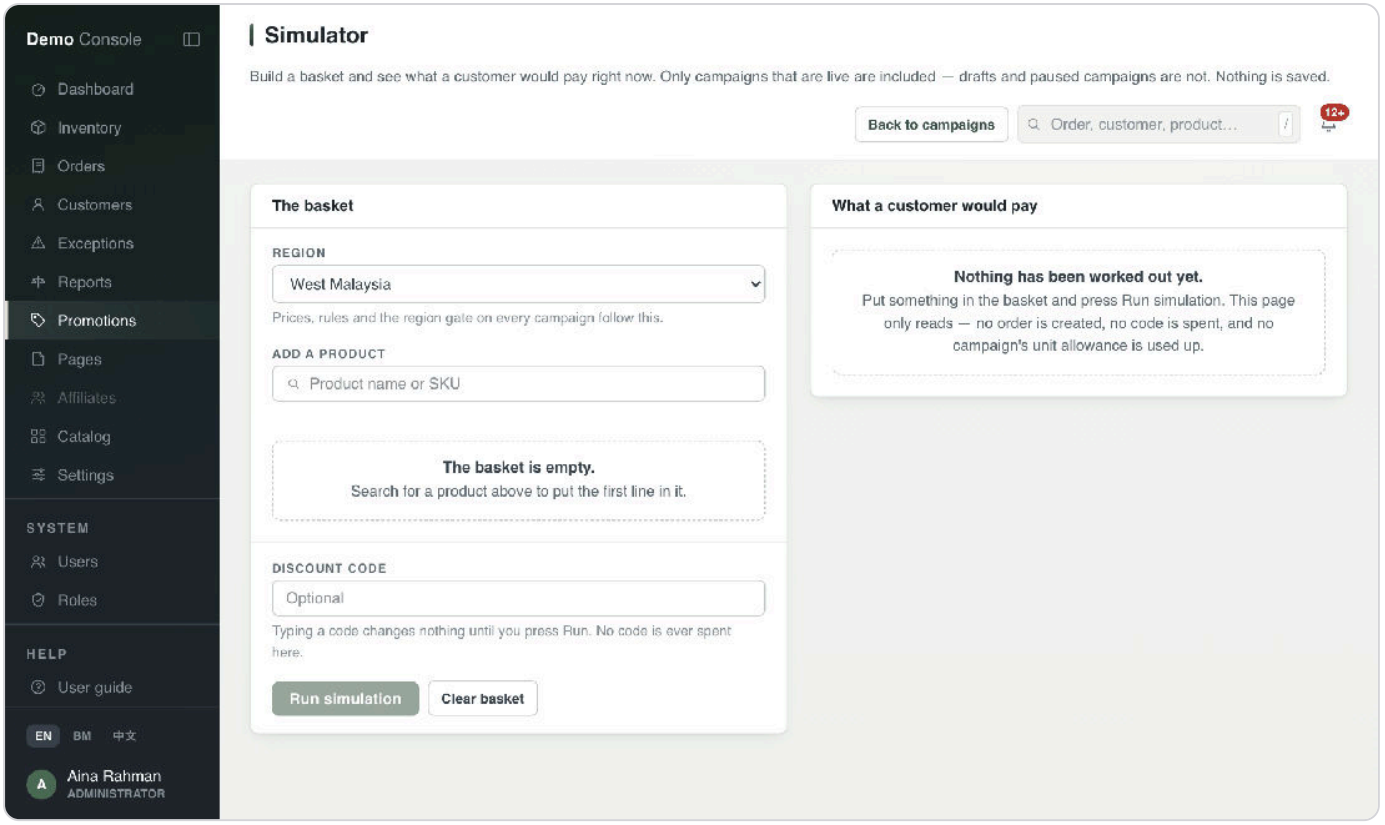
Status

A campaign is **Draft** until switched on, **Scheduled** until its start date, **Live** after that, **Ended** after its end date, and **Used up** once a code reaches its limit. **Pause** and **Delete** are locked while a campaign is a draft or once it has been used.

Only a discount code has a "total uses" limit. No campaign has a "uses per customer" limit.

Try it before customers do

Press **Simulator**. Choose a region, add products, type a discount code if you want, and press **Run simulation**. It shows what a customer would pay right now under the live campaigns. Drafts and paused campaigns are not included. Nothing is saved and no code is spent.



Finance staff are never allowed to create promotions.

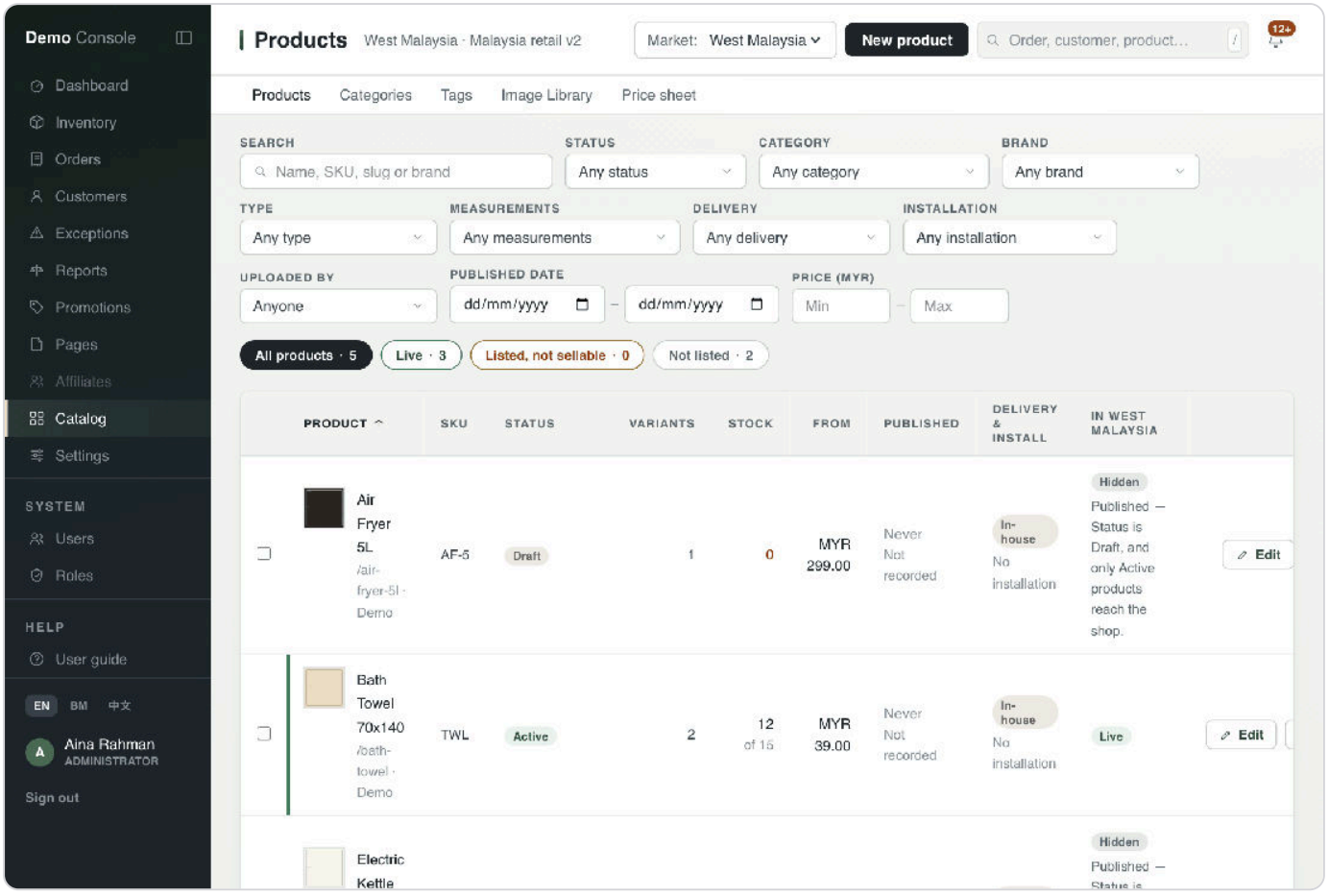
E-COMMERCE

Change products and categories

For: Merchandiser

Find a product

1. Open **Catalog** in the menu. The **Products** tab opens.
2. Choose the **Market** at the top. Each market has its own price list.
3. Search by name, SKU (the product code), slug or brand, or narrow the list with the filters. The pills split **Live**, **Listed, not sellable** and **Not listed** products.
4. Press **Edit** on a row, or **New product** to add one.

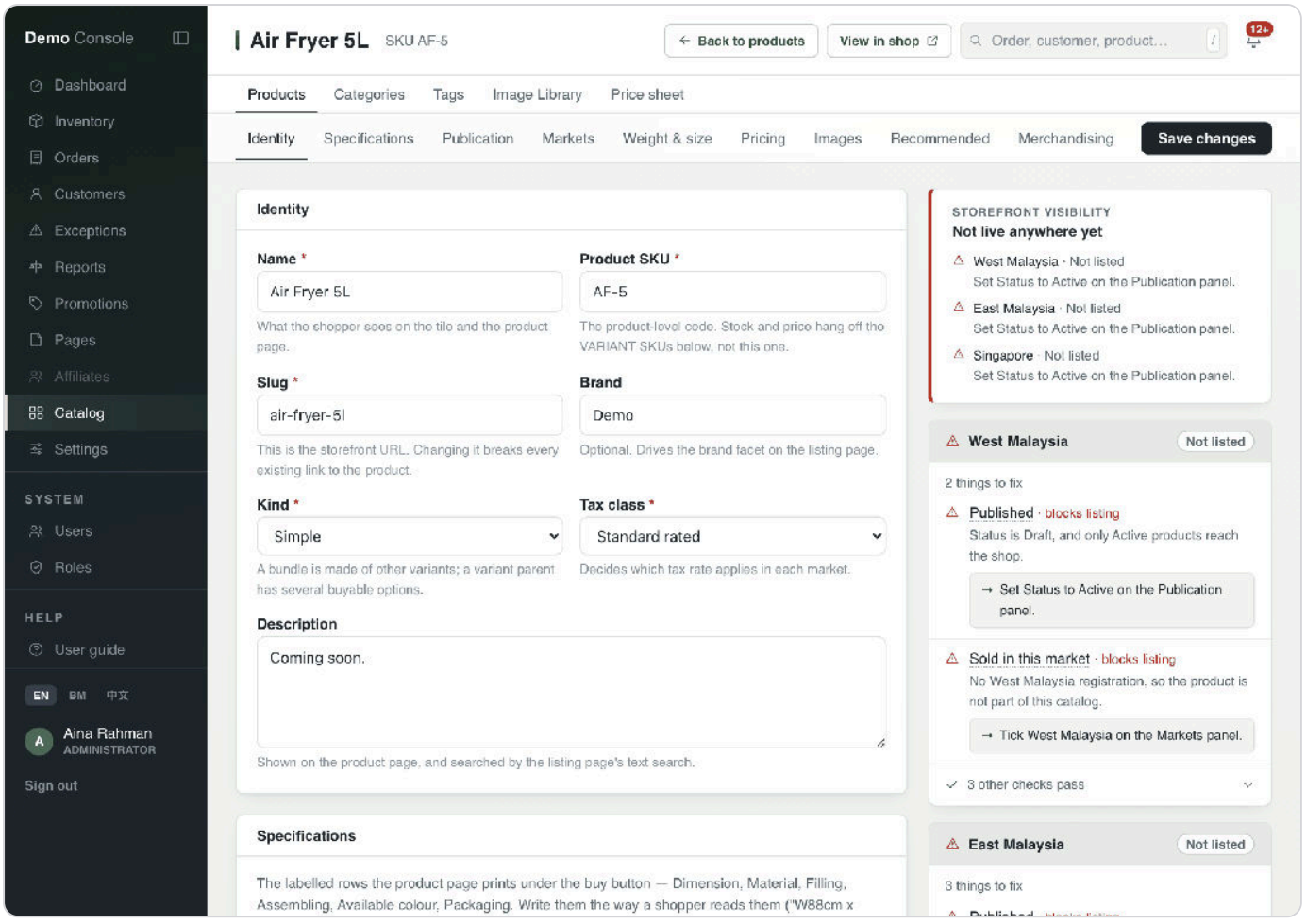


The last column shows whether the product is really on sale in that market. A product is live only when it is published, registered for that market, has an active option, and has a price on the market's current price list.

Change a product

1. The tabs across the top are **Identity**, **Specifications**, **Publication**, **Markets**, **Weight & size**, **Pricing**, **Images**, **Recommended** and **Merchandising**.

2. Make your change, then press **Save changes**. All tabs are saved together.
3. The box on the right says, per market, why the product is not on sale yet and what to fix.
4. **View in shop** opens the product page customers see.

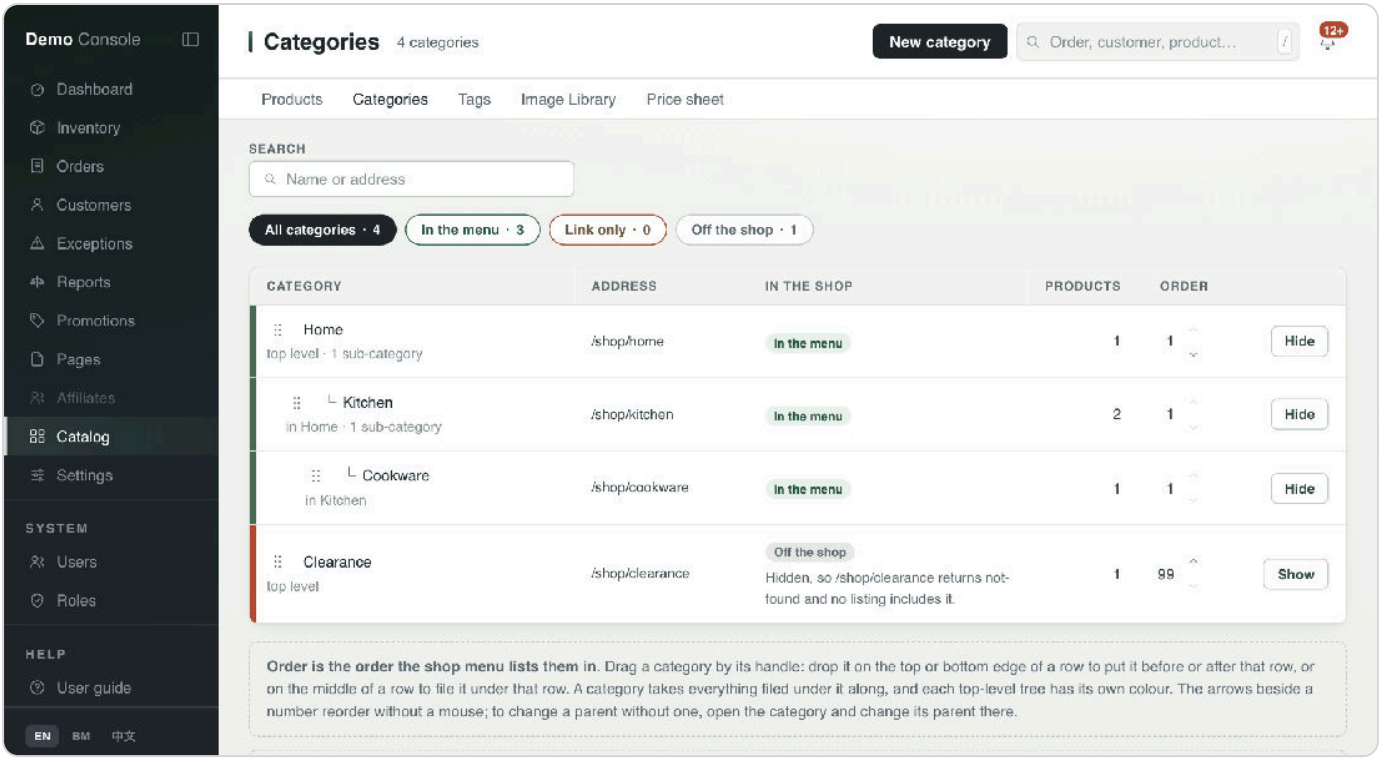


Changing a product's slug (its web address) breaks every existing link to it.

Stock is not changed here. A Merchandiser can shape products but never correct stock; that is done on the **Inventory** screens.

Categories

The **Categories** tab shows the shop's menu, in the order customers see it. Drag a category by its handle to move it. **Hide** takes a category off the shop without deleting it; **Show** puts it back. Press **New category** to add one.


Demo Console
Dashboard
Inventory
Orders
Customers
Exceptions
Reports
Promotions
Pages
Affiliates
Catalog
Settings
SYSTEM
Users
Roles
HELP
User guide
EN
BM
中文
Categories
4 categories
New category
Order, customer, product…
12+
Products
Categories
Tags
Image Library
Price sheet
SEARCH
Name or address
All categories · 4
In the menu · 3
Link only · 0
Off the shop · 1
CATEGORY
ADDRESS
IN THE SHOP
PRODUCTS
ORDER
Home
top level · 1 sub-category
/shop/home
In the menu
1
1
Hide
Kitchen
in Home · 1 sub-category
/shop/kitchen
In the menu
2
1
Hide
Cookware
in Kitchen
/shop/cookware
In the menu
1
1
Hide
Clearance
top level
/shop/clearance
Off the shop
Hidden, so /shop/clearance returns not-found and no listing includes it.
1
99
Show
Order is the order the shop menu lists them in. Drag a category by its handle: drop it on the top or bottom edge of a row to put it before or after that row, or on the middle of a row to file it under that row. A category takes everything filed under it along, and each top-level tree has its own colour. The arrows beside a number reorder without a mouse; to change a parent without one, open the category and change its parent there.

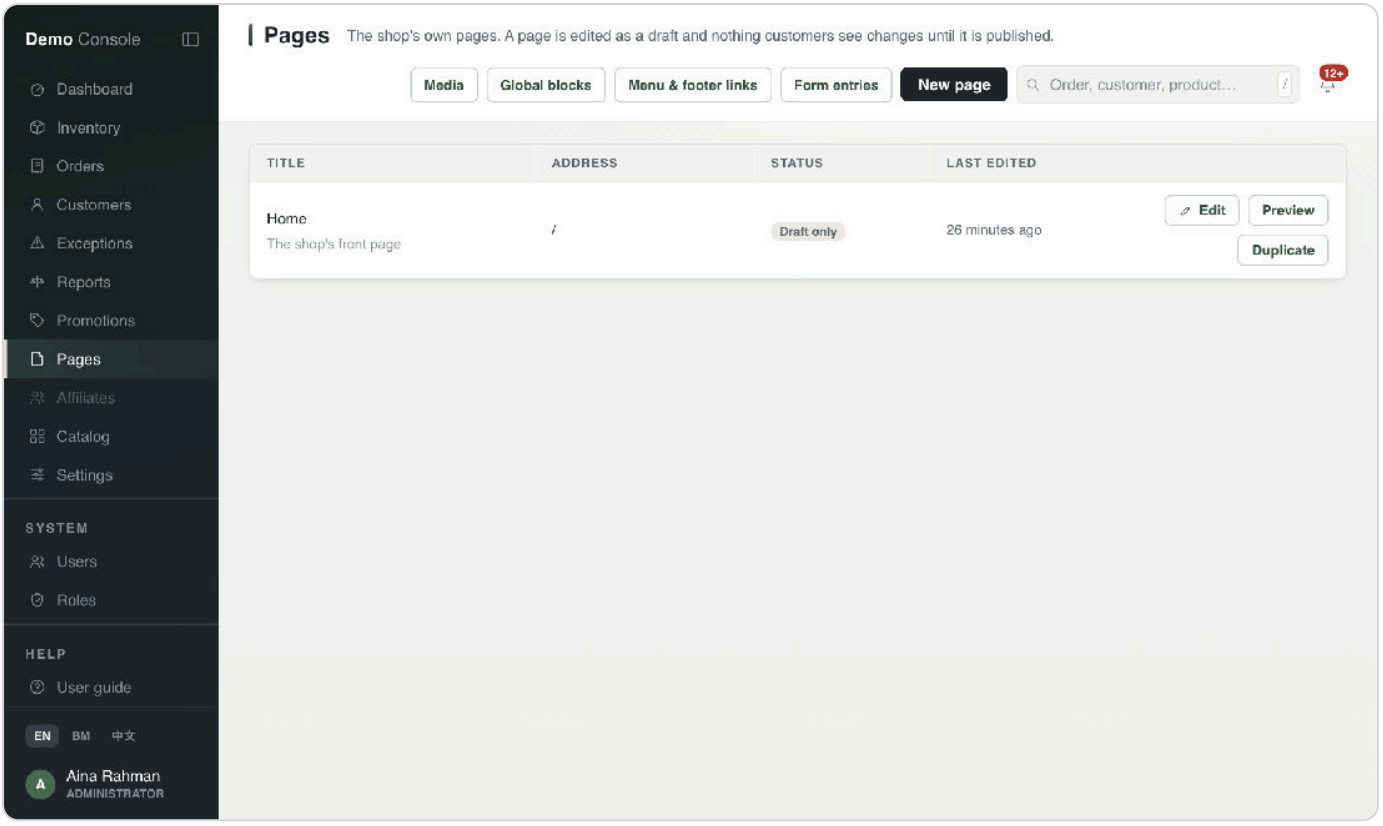
E-COMMERCE

Edit the shop's pages

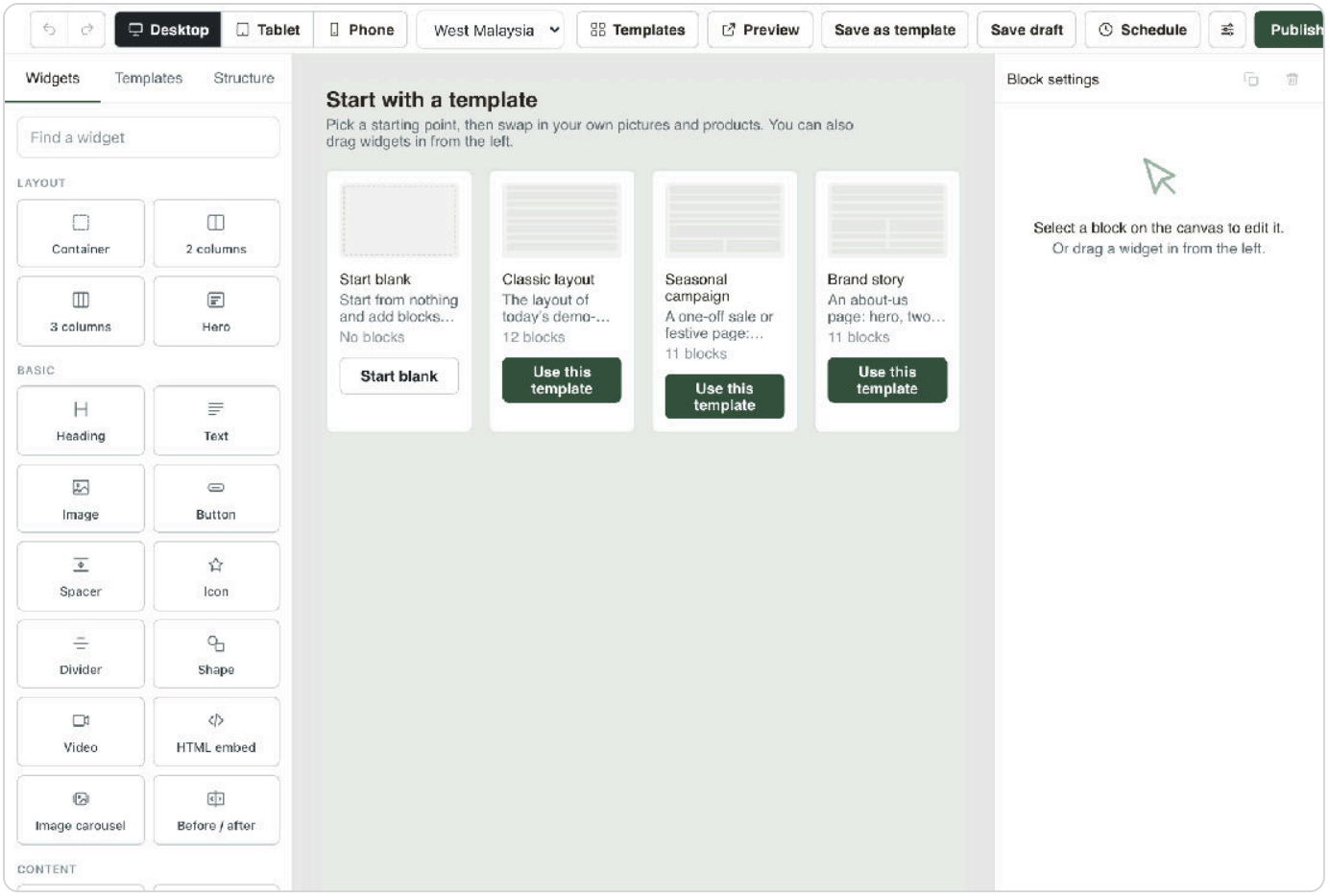
For: Marketing

The shop's own pages, such as the home page, are built here. You edit a draft; customers see nothing until you publish it.

1. Open **Pages** in the menu.
2. Press **Edit** on a page, **Duplicate** to copy one, or **New page**.



3. A new page can start from a template: press **Use this template**, or **Start blank**.
4. Drag blocks from **Widgets** on the left onto the page, such as **Heading**, **Text**, **Image** or **Button**. Click a block to change it in **Block settings** on the right.
5. **Desktop**, **Tablet** and **Phone** at the top show how the page looks on each screen.
6. Press **Save draft** to keep your work, **Preview** to see it as customers will, **Schedule** to publish at a set time, or **Publish** to put it live now.



The buttons above the page list open the shared **Media** library, **Global blocks** (blocks reused on many pages), **Menu & footer links**, and **Form entries** (what customers sent through forms on your pages).

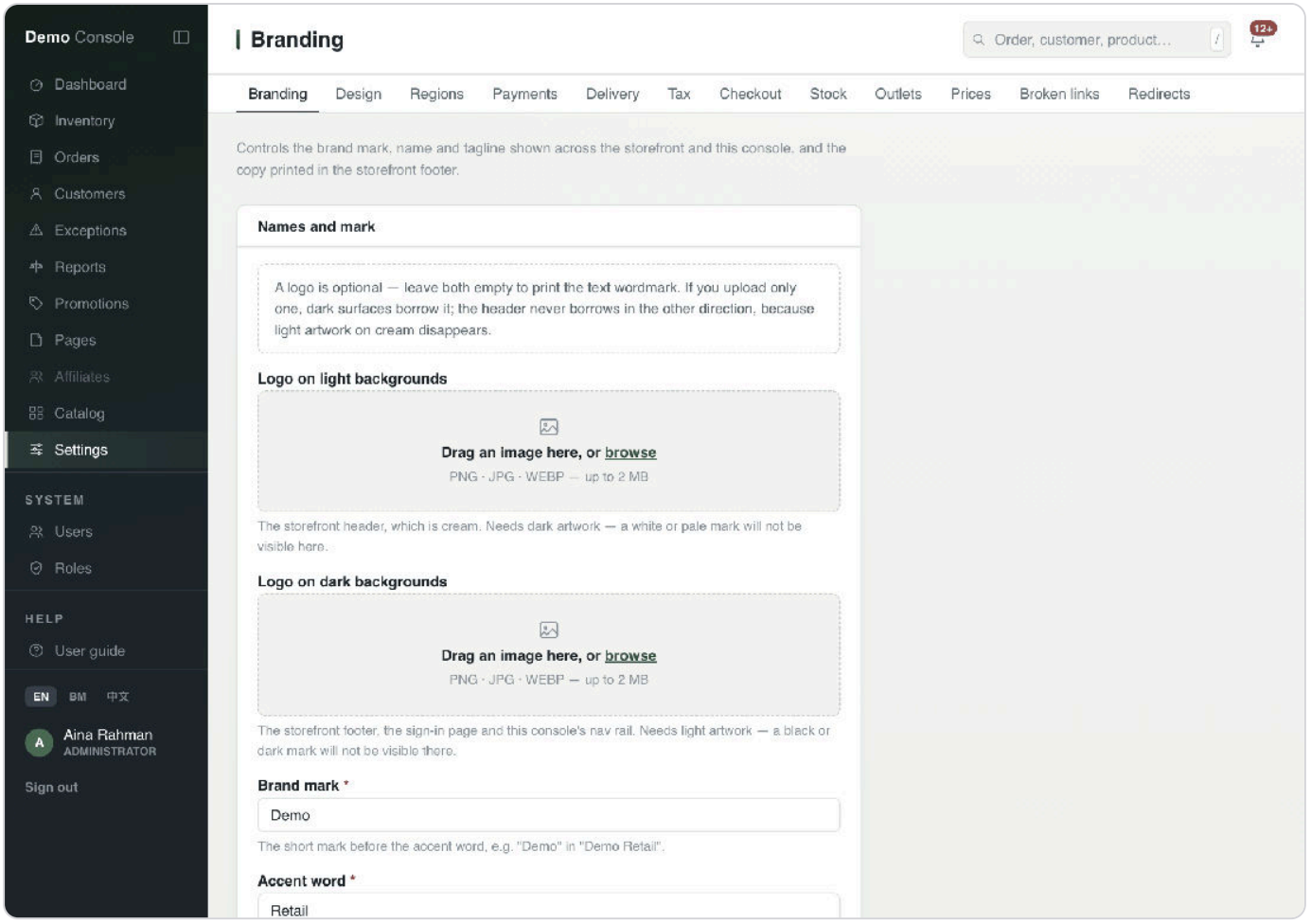
E-COMMERCE

Shop settings

For: Administrators

Open **Settings** in the menu. The tabs across the top hold the shop's set-up. Most staff never need them.

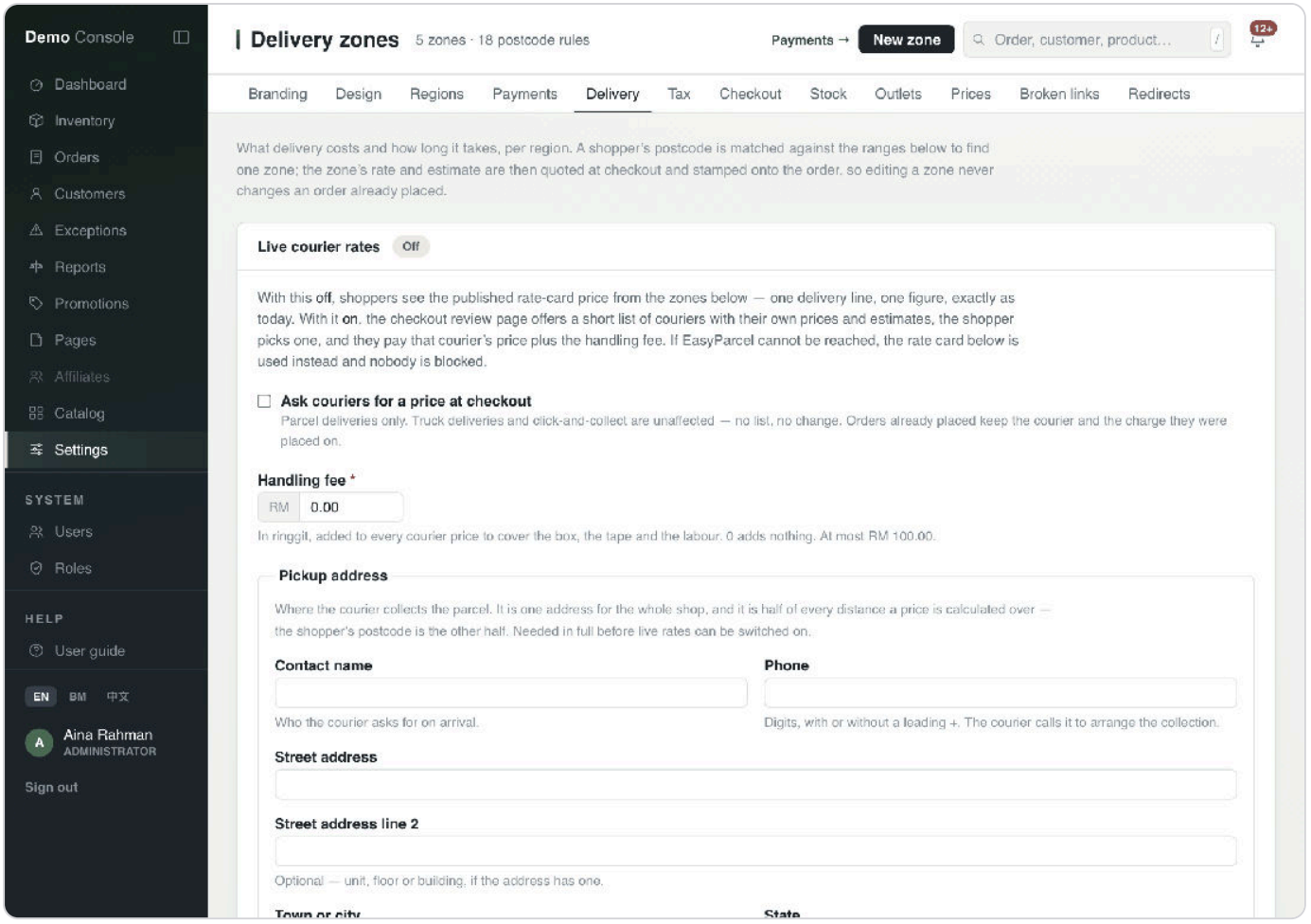
Tab	What it controls
Branding	Your logos, the shop's name, tagline and footer text.
Design	Named colours every shop page can use. Changing one repaints every page that uses it.
Regions	The markets the shop sells in, each with its currency, tax and language.
Payments	Which payment methods each region offers, and in what order.
Delivery	Delivery zones and prices by postcode, and live courier prices.
Tax	Tax rates per region. A change starts a new rate from a date; old rates are kept.
Checkout	How long stock is held for a customer who is paying, between 3 and 240 minutes.
Stock	Keep a number of units of every item back from the online shop, so the last units on the shelf are not sold online.
Outlets	Every outlet and warehouse, whether customers can buy from it or collect there, and which is used first.
Prices	The price lists per market. One is live; older ones are kept.
Broken links, **Redirects**	Old web addresses customers still visit, and where to send them.



Delivery

Each delivery zone covers a set of postcodes in one region, with its price and how many working days it takes. Press **New zone** to add one.

With **Live courier rates** off, customers see the zone price. Tick **Ask couriers for a price at checkout** to show customers a list of couriers with their own prices instead. You then need a **Pickup address** and can add a **Handling fee**. This works for parcels only, not truck deliveries or click-and-collect.


Demo Console
Dashboard
Inventory
Orders
Customers
Exceptions
Reports
Promotions
Pages
Affiliates
Catalog
Settings
SYSTEM
Users
Roles
HELP
User guide
EN BM 中文
Aina Rahman
ADMINISTRATOR
Sign out
Delivery zones
5 zones · 18 postcode rules
Payments →
New zone
Order, customer, product…
12+
Branding Design Regions Payments Delivery Tax Checkout Stock Outlets Prices Broken links Redirects
What delivery costs and how long it takes, per region. A shopper's postcode is matched against the ranges below to find one zone; the zone's rate and estimate are then quoted at checkout and stamped onto the order, so editing a zone never changes an order already placed.
Live courier rates
Off
With this off, shoppers see the published rate-card price from the zones below — one delivery line, one figure, exactly as today. With it on, the checkout review page offers a short list of couriers with their own prices and estimates, the shopper picks one, and they pay that courier's price plus the handling fee. If EasyParcel cannot be reached, the rate card below is used instead and nobody is blocked.
Ask couriers for a price at checkout
Parcel deliveries only. Truck deliveries and click-and-collect are unaffected — no list, no change. Orders already placed keep the courier and the charge they were placed on.
Handling fee *
RM 0.00
In ringgit, added to every courier price to cover the box, the tape and the labour. 0 adds nothing. At most RM 100.00.
Pickup address
Where the courier collects the parcel. It is one address for the whole shop, and it is half of every distance a price is calculated over — the shopper's postcode is the other half. Needed in full before live rates can be switched on.
Contact name
Who the courier asks for on arrival.
Phone
Digits, with or without a leading +. The courier calls it to arrange the collection.
Street address
Street address line 2
Optional — unit, floor or building, if the address has one.
Town or city
State

E-COMMERCE

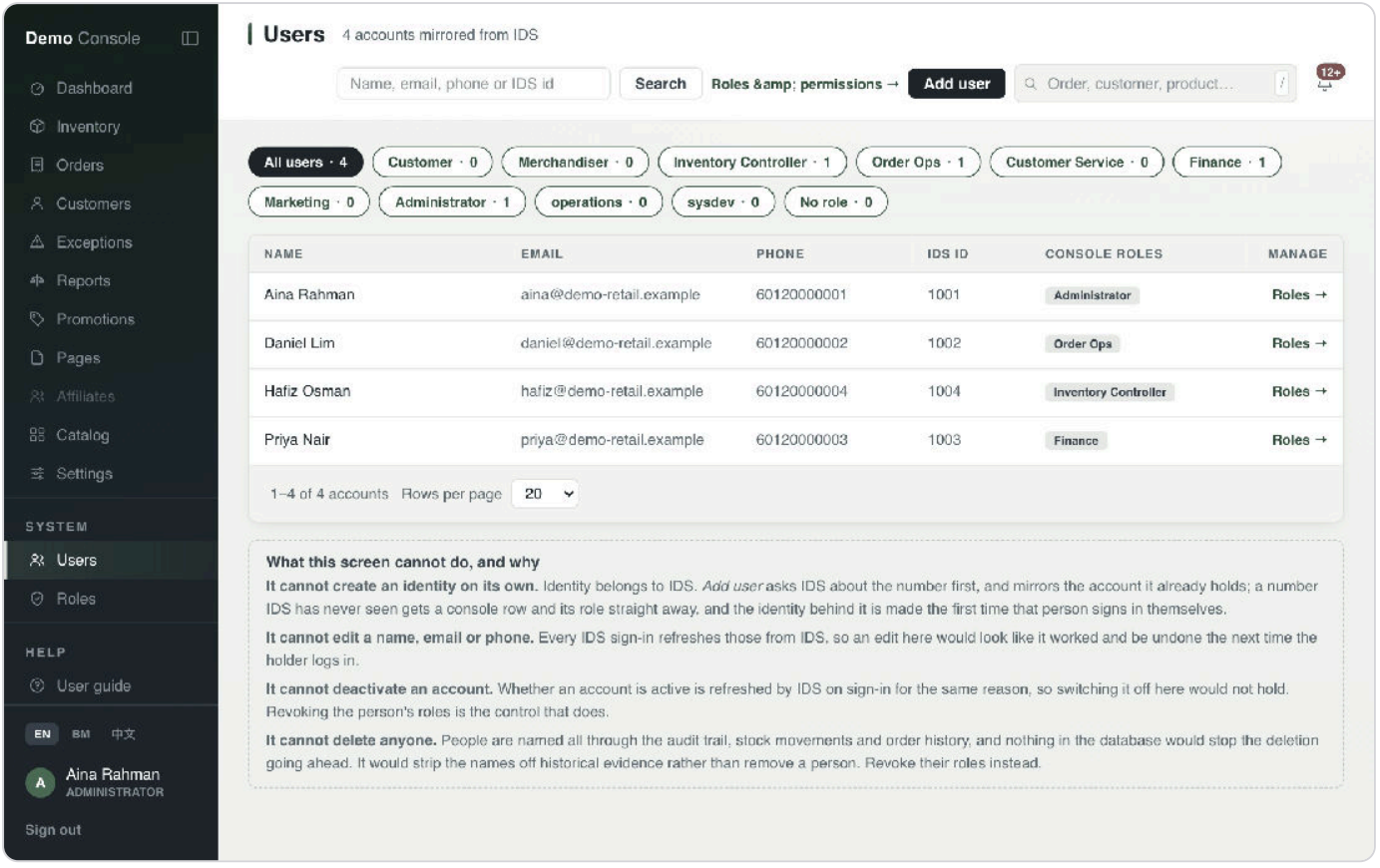
Give staff access

For: Administrators

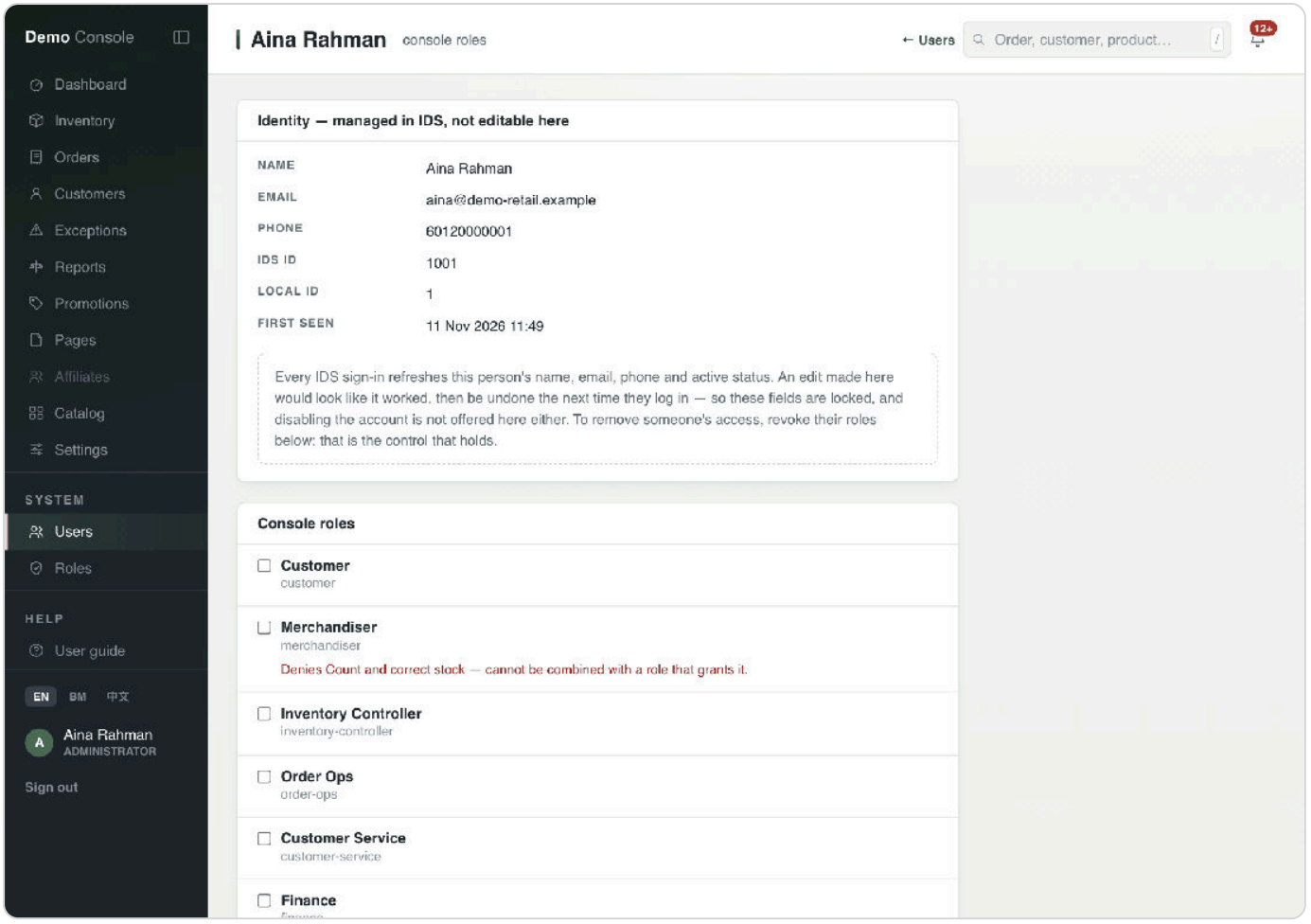
People sign in with your company's shared sign-in account (IDS). This screen only decides what each person can do in the console.

Give someone a role

1. Open **Users** in the menu. Use the pills to see who holds each role.
2. Press **Roles →** on a person's row. To add someone not on the list, press **Add user** and type their mobile number; the console looks the number up first.
3. Tick their roles and press **Save roles**.



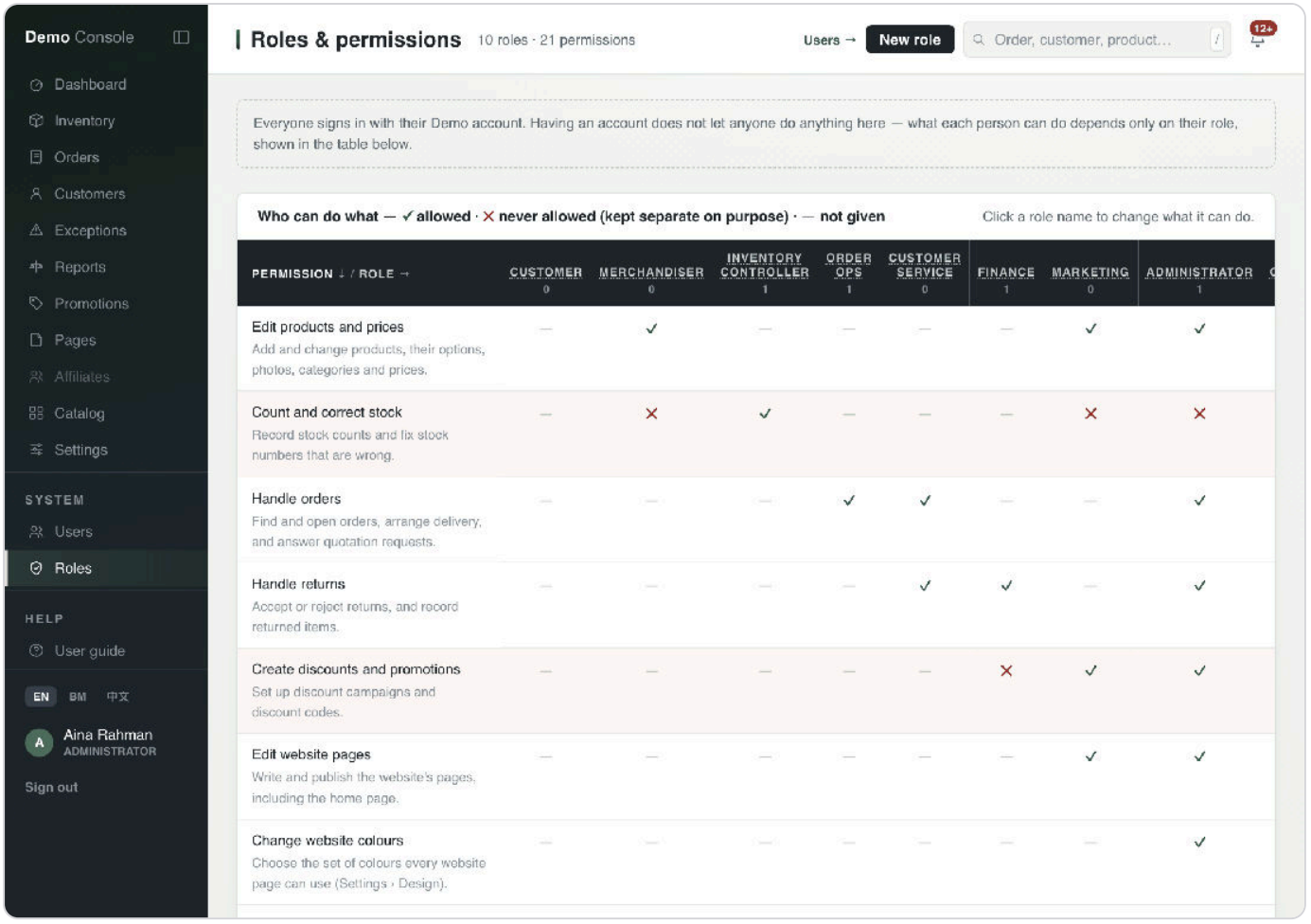
A person's name, email and phone cannot be edited here. They come from the sign-in account and are refreshed every time the person signs in. To remove someone's access, untick all their roles. People cannot be deleted, because their name stays on orders and stock records.



Some roles cannot be combined. For example, a person cannot hold Administrator and Inventory Controller together, because an Administrator is never allowed to correct stock. The page says so under the role before you save.

See what each role can do

Open **Roles**. The table shows every permission down the side and every role across the top: ✓ allowed, ✕ never allowed (kept separate on purpose), — not given. Click a role name to change it, or press **New role**.


Demo Console
Dashboard
Inventory
Orders
Customers
Exceptions
Reports
Promotions
Pages
Affiliates
Catalog
Settings
SYSTEM
Users
Roles
HELP
User guide
EN BM 中文
A
Aina Rahman
ADMINISTRATOR
Sign out
Roles & permissions
10 roles · 21 permissions
Users →
New role
Order, customer, product…
/
12+
Everyone signs in with their Demo account. Having an account does not let anyone do anything here — what each person can do depends only on their role, shown in the table below.
Who can do what — ✓ allowed · ✕ never allowed (kept separate on purpose) · — not given
Click a role name to change what it can do.
PERMISSION ↓ / ROLE →
CUSTOMER 0
MERCHANDISER 0
INVENTORY CONTROLLER 1
ORDER OPS 1
CUSTOMER SERVICE 0
FINANCE 1
MARKETING 0
ADMINISTRATOR 1
Edit products and prices
Add and change products, their options, photos, categories and prices.
Count and correct stock
Record stock counts and fix stock numbers that are wrong.
Handle orders
Find and open orders, arrange delivery, and answer quotation requests.
Handle returns
Accept or reject returns, and record returned items.
Create discounts and promotions
Set up discount campaigns and discount codes.
Edit website pages
Write and publish the website's pages, including the home page.
Change website colours
Choose the set of colours every website page can use (Settings › Design).

USER GUIDE · VERSION 1

Outlet audit

Check an outlet against a checklist, with photos as proof, a score, and follow-up on anything that failed.

1. What it is for
2. How an audit works
3. Start an audit
4. Answer the checklist
5. Check and submit an audit
6. Respond to an audit of your outlet
7. Watch your outlets and plan audits
8. Follow up findings
9. Set up outlets, people and checklists
10. Words it uses

What it is for

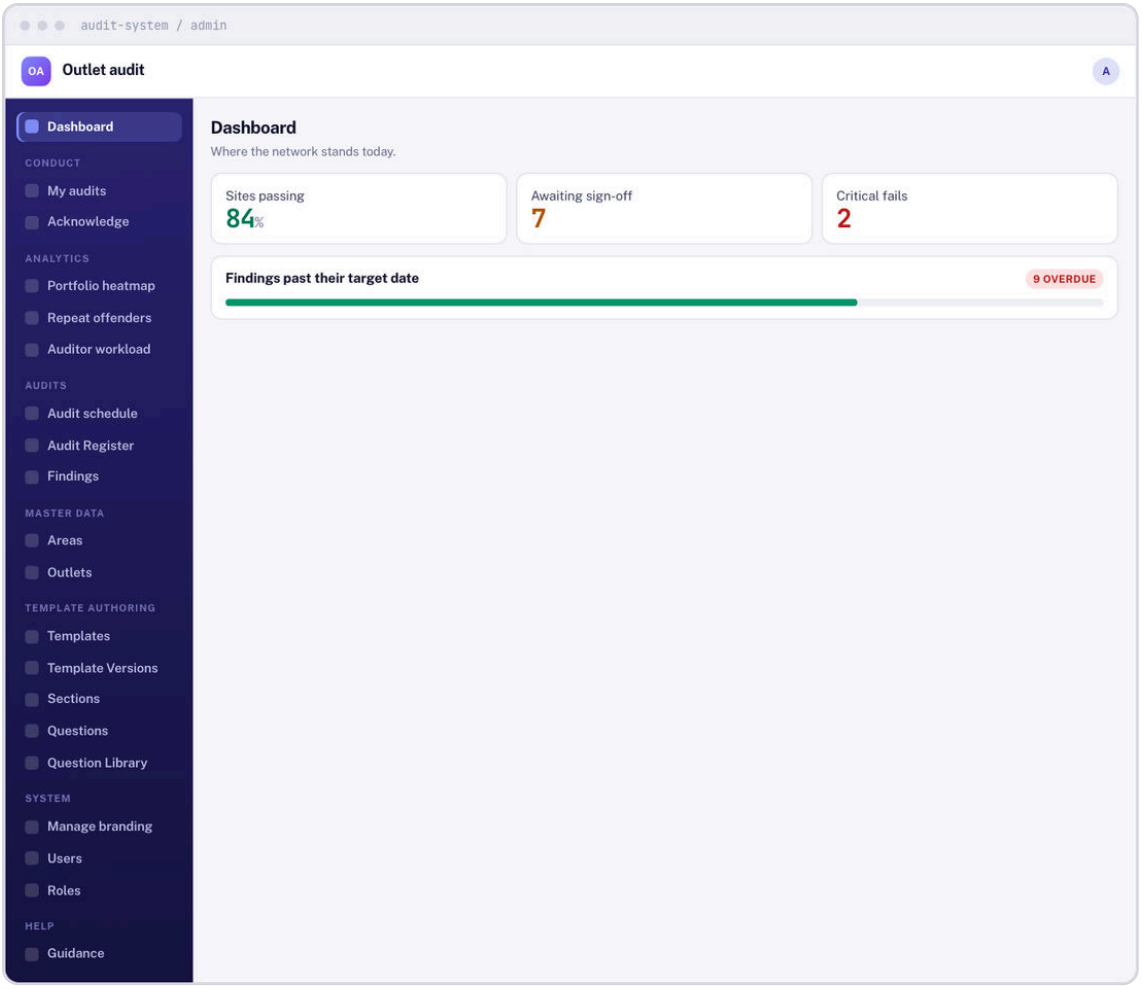
For: Everyone

Outlet audit records whether each outlet follows your company's standard procedures. Someone who does not run the outlet visits it, works through a checklist, and photographs what they find. When they submit, the result is locked, the outlet manager is asked to respond, and every failed question becomes a follow-up job with a deadline.

Who uses it

Role	What they do
Internal Auditor	Visits outlets anywhere in the company, answers the checklist and submits.
Area Manager	Does the same for the outlets in their own areas, plans audit schedules, and settles clashes when the same audit is sent twice.
Outlet Manager	Responds to audits of their own outlet. They see one screen, **Acknowledge**, and this guide.
System Administrator	Sets up areas, outlets, people and checklists, and publishes checklists.

The menu on the left shows only what your role can use. If something in this guide is missing from your menu, your role does not include it.



What it needs from other modules

- You sign in through the Portal. Your name and phone number come from there and cannot be changed here.
- Outlets, and who manages which outlet, come from your company's staff and outlet records in the Portal.
- An audit request raised in **Customer service** appears here as a one-off audit schedule.

OUTLET AUDIT

How an audit works

For: Everyone

An audit goes through six steps. People do steps 1, 2, 3 and 5. The system does the rest.

1. **Start.** The auditor picks the outlet and the checklist.
2. **Answer.** The auditor answers every question **Pass**, **Fail** or **N/A** and takes the photos each question asks for.
3. **Submit.** The auditor checks the result and submits. The audit is now locked.
4. **Report.** Every failed question becomes a finding (a follow-up job with a deadline). The report goes to the outlet, the area and the auditor.
5. **Respond.** The outlet manager acknowledges, disputes or declines the result within 72 hours.
6. **Fix.** Each finding has a deadline. Late findings are passed up the management chain.

Rules no one can switch off

- **Nobody audits their own outlet.** The outlet you manage is not offered when you start an audit, and an Outlet Manager cannot start audits at all.
- **There is no way to type an audit in afterwards.** An audit only exists if someone starts it and answers it.
- **No result without its photos.** An audit cannot be submitted until every required photo has uploaded and been checked.
- **Submitting locks the audit for good.** Nobody can edit or delete it. A correction is a new audit that points back to the old one.
- **One failed critical question fails the whole audit**, whatever the percentage. A result can read "FAIL, computed 87%", and that is correct.
- **Each question is all or nothing. Pass** earns its full points, **Fail** earns none.
- **N/A does not count as a pass.** The question is left out of the score. **Fail** and **N/A** both need a comment.
- **Each checklist sets its own grade lines.** Old audits keep the grade lines of the checklist they used.
- **72 hours to respond.** After that the audit goes to the Area Manager, marked as not acknowledged. The score still stands.

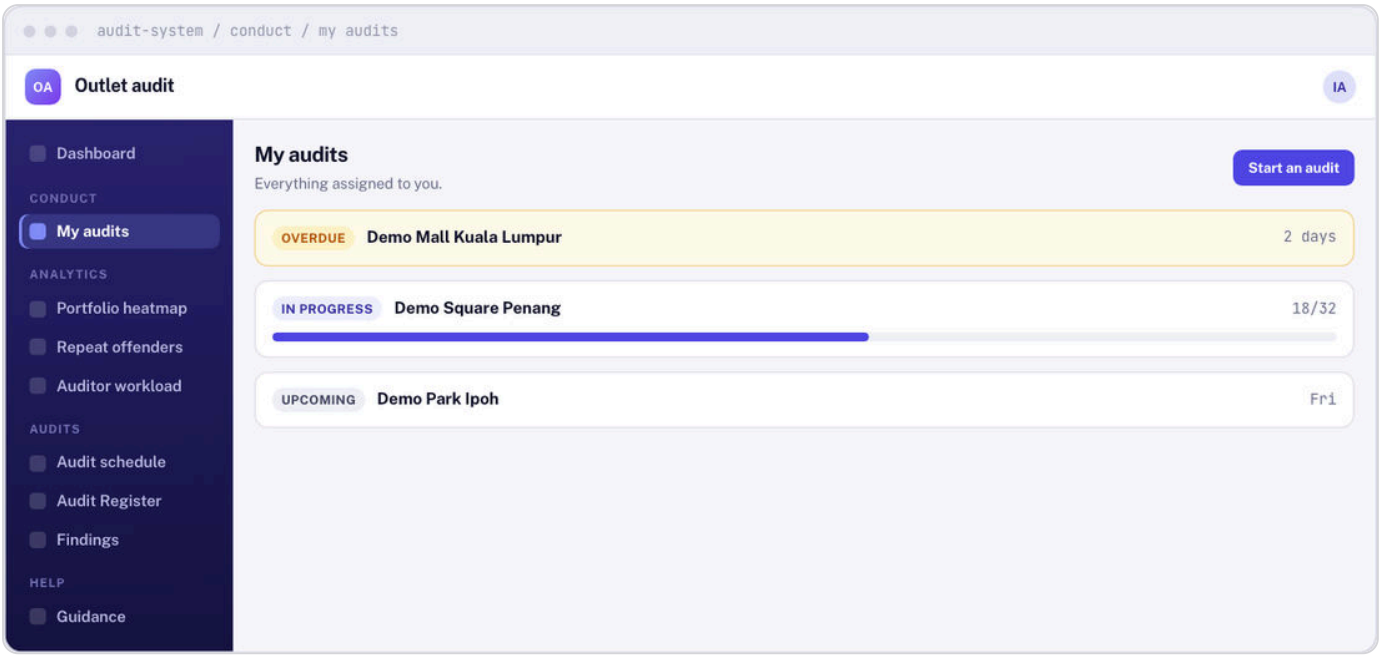
- **Findings have deadlines by severity:** 3 days for high, 14 days for medium, 30 days for low. A late finding moves up the chain: Outlet Manager, then Area Manager, then Maintenance head of department, then Head of Operations.

OUTLET AUDIT

Start an audit

For: Internal Auditors and Area Managers

1. Open **My audits** in the menu on the left, under **Conduct**.
2. Your audits are listed by what needs doing first: due today, overdue, in progress and upcoming. An audit you started and did not finish waits here with its answers saved. Press it to carry on.
3. To start a new one, press **Start an audit** at the top right.
4. Pick the **Outlet**. Only outlets you are allowed to audit are listed, and never the one you manage.
5. Pick the **Standard** (the checklist). Only published checklists are listed.
6. Press **Open the audit**.



The outlet name and the checklist version are saved onto the audit when you start it. Publishing a newer checklist later does not change an audit you already started.

You need a connection the whole time

Every answer and photo is saved to the server as you go. Nothing is kept on your phone. If the connection drops, what you already saved is safe, but wait until it comes back before you carry on.

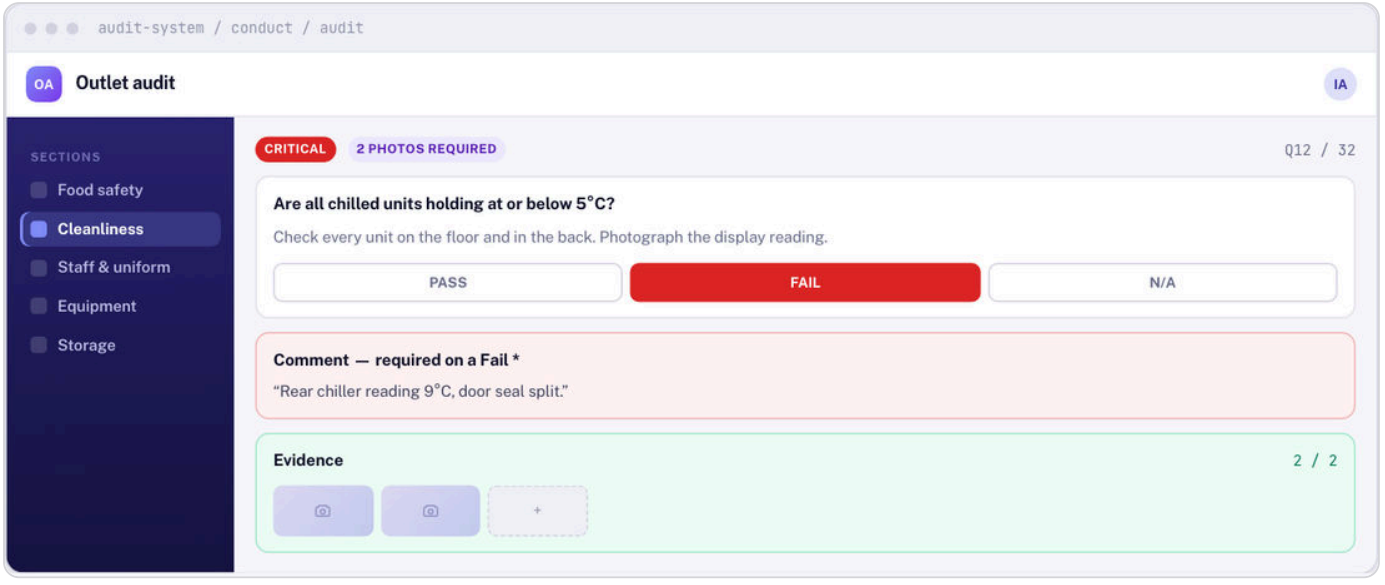
OUTLET AUDIT

Answer the checklist

For: Internal Auditors and Area Managers

The checklist is split into sections, listed on the left with how many questions each holds. The top of the screen shows how many questions are done and the running score.

1. Press a section, then press a question.
2. Choose **Pass**, **Fail** or **N/A**.
    - **N/A** means the question does not apply to this outlet. It is left out of the score.
3. If you chose **Fail** or **N/A**, write a comment saying why. The box is marked required. For a **Pass**, the **Note (optional)** box is there if you want it.
4. Add the photos the question asks for. A question shows how many photos it needs, whatever the answer.
5. Press **Next item** to move on, or **Previous** to go back.



You can leave a question and come back. It stays incomplete until it has an answer, its comment if one is needed, and its photos.

Critical questions

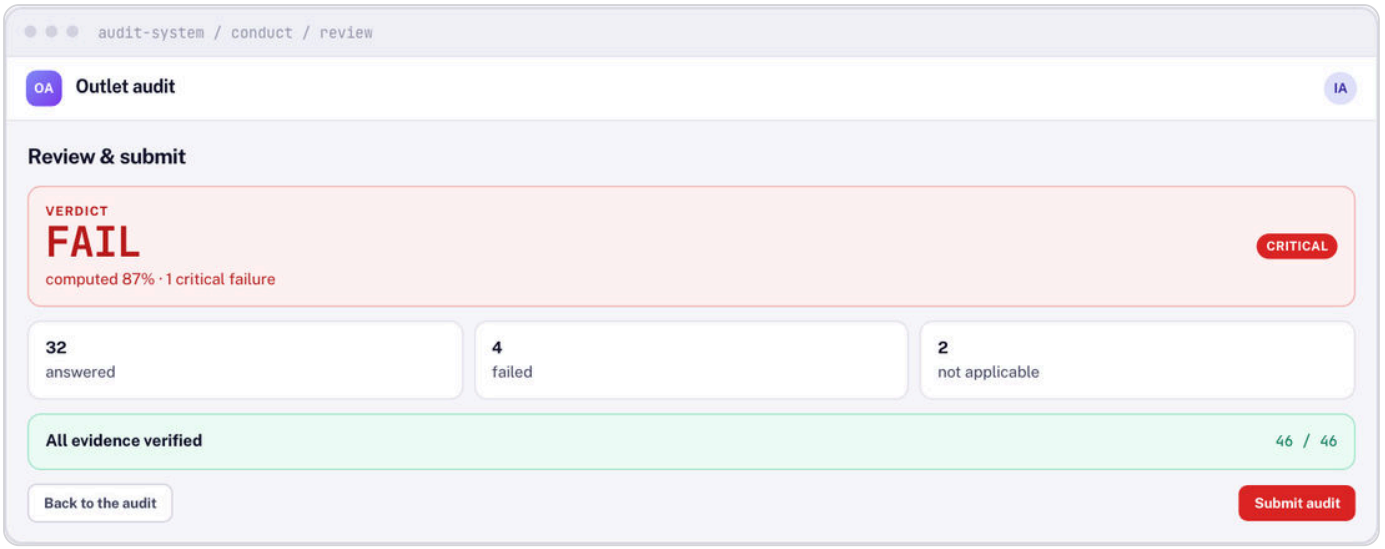
A question marked **CRITICAL** is one that could close a shop or hurt someone. If it fails, the whole audit fails, whatever the percentage.

OUTLET AUDIT

Check and submit an audit

For: Internal Auditors and Area Managers

1. When every question is done, press **Review & submit** under the list of sections.
2. Check the result: the verdict, the score for each section, and the photo count.
3. To change an answer, press **Back to the audit**.
4. When you are sure, press **Submit audit**.



Submitting locks the audit. Nobody can change it afterwards, including you.

If the screen says items are left, the audit cannot be submitted yet. A question counts as unfinished while its photos are missing, even if it has an answer.

After you submit

You do not need to do anything else. Findings are raised, the report is sent, and the outlet manager is asked to respond. You cannot respond to your own audit.

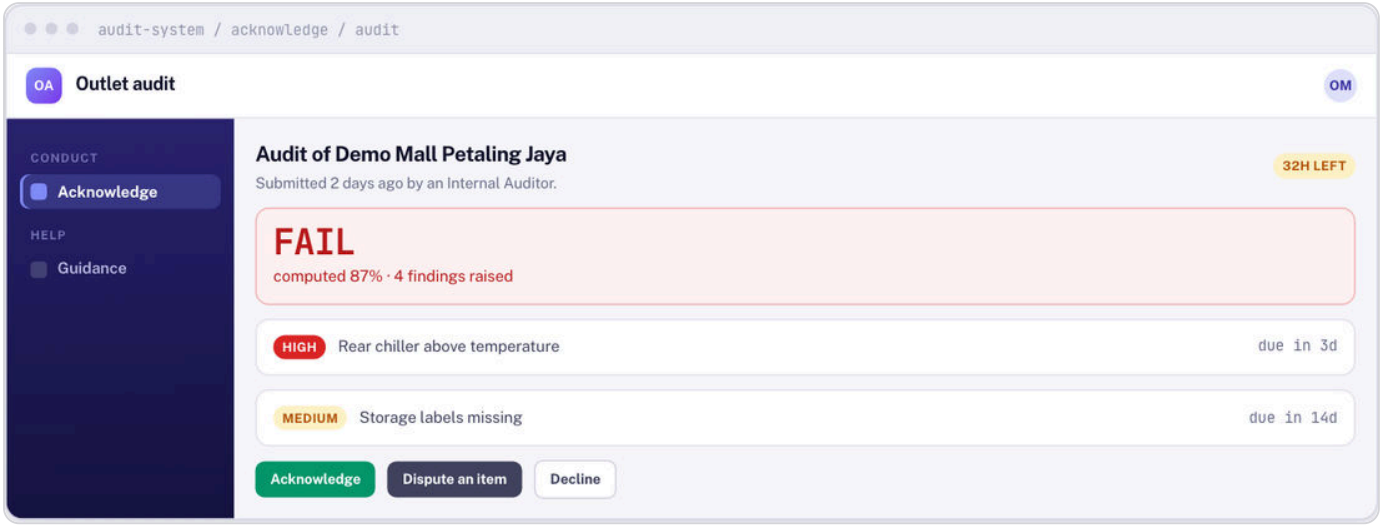
OUTLET AUDIT

Respond to an audit of your outlet

For: Outlet Managers

When your outlet is audited, you have 72 hours to respond. You may also get the report by email or WhatsApp, if your company has switched those on.

1. Open **Acknowledge** in the menu on the left. It lists audits of your outlet that are waiting for you.
2. Open the audit. You see the verdict, the score, every failed question, the auditor's comments and photos, and the deadline for each finding.
3. Choose one answer:
    - **Acknowledge**: you have read it and accept it.
    - **Dispute an item**: you accept it except for some items. Pick the items under **Items you dispute** and write **Why**. Your dispute is saved on the audit, where your Area Manager can see it. There is no separate review step on screen yet.
    - **Decline**: you do not accept it. Write a **Reason**.



There is nothing to sign. Your sign-in is your signature. You cannot change your answer afterwards; if your position changes, talk to your Area Manager.

What your answer changes

None of the three answers changes the score, the findings or the report. If something is wrong, use **Dispute an item** and say what and why. Do not leave it unanswered.

If you do not respond in 72 hours, the audit goes to your Area Manager, marked as not acknowledged. The result and findings still stand.

OUTLET AUDIT

Watch your outlets and plan audits

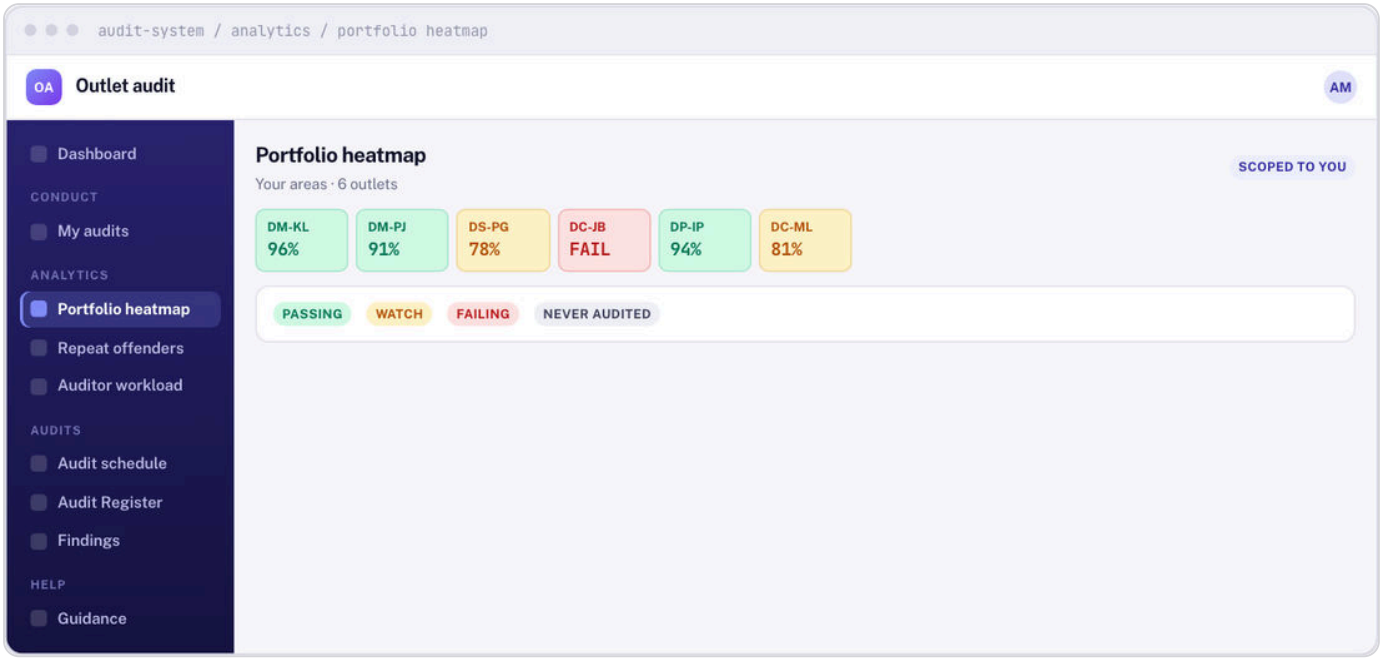
For: Area Managers

You do everything an Internal Auditor does, for the outlets in your own areas. Your screens show only those outlets. If your screens are empty, nobody has linked you to your outlets yet. Ask a System Administrator.

See where to look

Under **Analytics** in the menu on the left:

- **Portfolio heatmap**: every outlet coloured by its latest result. Green is passing, amber is passing but close to the line, red is failing, and grey with a dash means never audited. Press an outlet to open its scorecard.
- **Repeat offenders**: what keeps failing, not what failed once.
- **Auditor workload**: who is carrying how many audits.



A red **FAIL** can sit over a high percentage. That means a critical question failed.

Plan audits

1. Open **Audit schedule** under **Audits**.
2. Press **New audit schedule**.
3. Choose the **Scope**: **A single outlet** or **An area (every outlet in it)**. Then pick the outlet or area and the **Standard**.

4. Choose the **Frequency**, the **Next due** date, and who it is **Conducted by**. Leave **Named auditor** empty to let the first free person take it.
5. Add a **Reason** if the auditor should know why, then press **Create**.

Requests raised in Customer service appear in the same list, with the customer's complaint as the reason.

Settle an audit sent twice

If two devices submit the same audit, the first one counts. The second is kept, not lost, and shows **CONFLICT** in **Audit Register**. Open it, press **Resolve conflict**, and decide what happens to the second copy.

You cannot swap the two, so the second copy becomes the one that counts. Only a System Administrator can do that.

Audits nobody answered

If an Outlet Manager does not respond within 72 hours, the audit comes to you, marked as not acknowledged. The score and findings still stand. Only the outlet's response is missing.

Follow up findings

For: Area Managers and System Administrators

A finding is a failed question turned into a job, with a severity, an owner and a deadline. Findings are raised by the system when an audit is submitted. Nobody has to file them.

1. Open **Findings** under **Audits** in the menu on the left.
2. Each row shows the outlet, the severity, what was found, how old it is and who it is sitting with.
3. Open a finding to see the photos and comments from the audit.

Deadlines

Severity	Deadline	Moves up the chain every
High	3 days	1 day once late
Medium	14 days	7 days once late
Low	30 days	14 days once late

A late finding moves from the Outlet Manager to the Area Manager, then the Maintenance head of department, then the Head of Operations.

Where repairs are tracked

Repairs are meant to be logged and closed in your company's repair-tracking system, not here. **That link does not work yet.** Each finding gets a reference number, but no repair job is opened anywhere. Agree with your team how repairs are tracked until it is connected.

Record that a fix was checked

A System Administrator can open a finding and press **Record a verification** to note that someone went back, what they saw, and their conclusion. This does not close the repair job. A finding can only be verified once. A later visit needs a new audit.

Set up outlets, people and checklists

For: Administrators

Do these in order. Each step needs the one before it.

1. Areas and outlets

Open **Areas**, then **Outlets**, under **Master data**. An outlet belongs to an area. Outlets normally arrive from your company's records in the Portal. Use **New area** or **New outlet** only for something the Portal does not have.

2. People

Open **Users** under **System**. Each person's name and phone come from the Portal sign-in and cannot be changed here. Here you set:

- their role, with **Edit**
- extra outlets they may work on, with **Assign outlets**

Who manages which outlet normally comes from the Portal. Until a person is linked to their outlets, an Area Manager or Outlet Manager sees empty screens and will think the system is broken. If someone says "there is nothing here", check this first.

3. Checklists

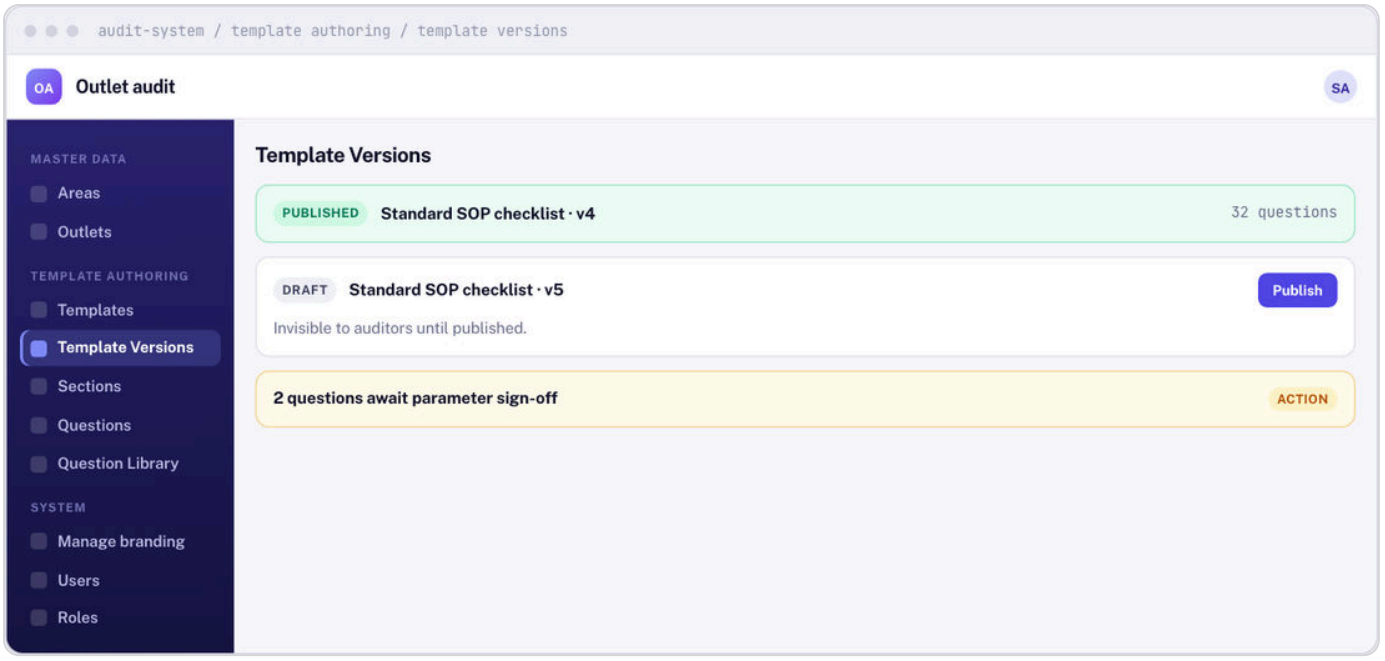
Under **Template authoring**:

- **Templates**: the checklist itself, for example "Standard SOP checklist".
- **Template Versions**: dated editions of a checklist.
- **Sections**: groups of questions inside a version.
- **Questions**: the questions themselves, with how many photos each needs and whether it is critical.
- **Question Library**: shared questions you can reuse, so the same check is worded the same way everywhere.

Mark a question critical only if failing it should fail the whole audit.

4. Publish

Auditors cannot see a draft. Open the draft in **Template Versions** and press **Publish**. From then on it is offered in **Start an audit**. Audits already submitted keep the version they used.



Some questions carry legal or safety limits, such as a fridge temperature. These need you to press **Confirm parameter** before they are treated as confirmed.

To stop using an old checklist, set **Retired on** on its template. It disappears from **Start an audit** and from new schedules. Finished audits keep it.

Running it day to day

- **Manage branding** under **System** sets the name and logo shown on screens, the sign-in page, and the reports.
- **Roles** under **System** sets what each role may do.
- If an audit sent twice was settled the wrong way round, open it from **Audit Register** and choose **Void this record, promote the rejected copy**. Only you can do this. It creates a new record and erases nothing.

Words it uses

For: Everyone

Word	Meaning
Audit	One visit to one outlet, against one published checklist.
Template, version	The checklist, and a dated edition of it. An audit keeps the version it used.
Critical question	A question that fails the whole audit if it fails.
N/A	The question does not apply to this outlet. It is left out of the score and needs a comment.
Evidence	The photos attached to a question. Each one is fingerprinted when it uploads, so it cannot be swapped later.
Syncing	Submitted, but still waiting for photos to finish checking. No report goes out until it clears.
Finding	A failed question turned into a job, with a severity, an owner and a deadline.
Severity	High, medium or low. It sets the deadline.
Acknowledge, dispute, decline	The three ways an outlet manager can respond to an audit.
Conflict	The same audit submitted twice. The first one counts. The second waits for an Area Manager.
Void	Marking a locked audit as not counting. It leaves every score but stays in **Audit Register** with the reason.
Retired	A checklist taken out of use. Past audits keep it.

USER GUIDE · VERSION 1

Project management

Run each outlet fit-out or renovation from budget to final payment: price the work, ask vendors for quotes, award the contract, and certify each payment the vendor claims.

1. What it is for
2. Find your way around
3. Create a project
4. Prepare a budget
5. Approve a document
6. Prepare the bill of quantities
7. Ask vendors for quotes
8. Compare quotes and award the work
9. Check and certify a claim
10. Handle a variation order
11. Follow costs, reports and retention
12. Quote for work
13. Claim a payment
14. Ask for a change to the work
15. Keep your company details up to date
16. Register and approve vendors
17. Add staff
18. Set who approves each document
19. Keep the rate templates

What it is for

For: Everyone

Project management keeps every outlet fit-out or renovation in one record, from the first budget to the last payment. Your company prices the work, sends it to vendors for quotes, awards the contract to one vendor, and then checks and pays each stage of the work. Every figure on the dashboard comes from those records, so nobody keeps a separate spreadsheet.

The module has two sides:

- **Staff** plan the project, approve money and certify payments.
- **Vendors** (the contractors your company hires) sign in to their own screens, where they see only the requests addressed to them. They send quotes, claim payments and keep their company papers up to date.

Who does what

The person's role decides which buttons they see. These are the roles as **Users & Roles** names them:

Role	What they do
Coordinator	Creates projects, prepares budgets and the bill of quantities, asks vendors for quotes, certifies claims
Project Manager	Usually the first approver of budgets, awards and variations
Head Of Operations	Usually the second approver
Ceo	Usually the last approver of large documents
Finance	Releases retention money
System Administrator	Adds staff, approves vendors, sets who approves what, keeps the rate templates

Who approves each document is set per project, so your company's chain may differ from the one above.

Words you will see

- **BQ (bill of quantities)**: the list of work items with quantities that vendors price.
- **RFQ (request for quotation)**: the invitation sent to vendors to price a BQ.
- **VO (variation order)**: a change to the work after the contract is awarded, either extra work or work removed.
- **Retention**: a small part of the contract held back until some months after the outlet opens, in case defects show up.
- **BVA (budget vs actual)**: how much of each budget line has really been spent.

What it needs from other modules

Staff sign in through the Portal. Outlet names come from your company's outlet list. Vendors sign in with their own phone number.

PROJECT MANAGEMENT

Find your way around

For: Staff

The menu on the left groups the pages in the order a project moves:

- **Overview**: **Dashboard** and **Projects**.
- **Cost & Tender**: **Budget**, **Bill of Quantities**, **RFQ** and **Comparison**.
- **Delivery**: **Variation Orders** and **Claims**.
- **Analysis**: **BVA** and **Reports**.
- **Admin**: **Vendors**, **Users & Roles**, **Templates**, **Approval Groups** and **Group Templates**. Only administrators use these.

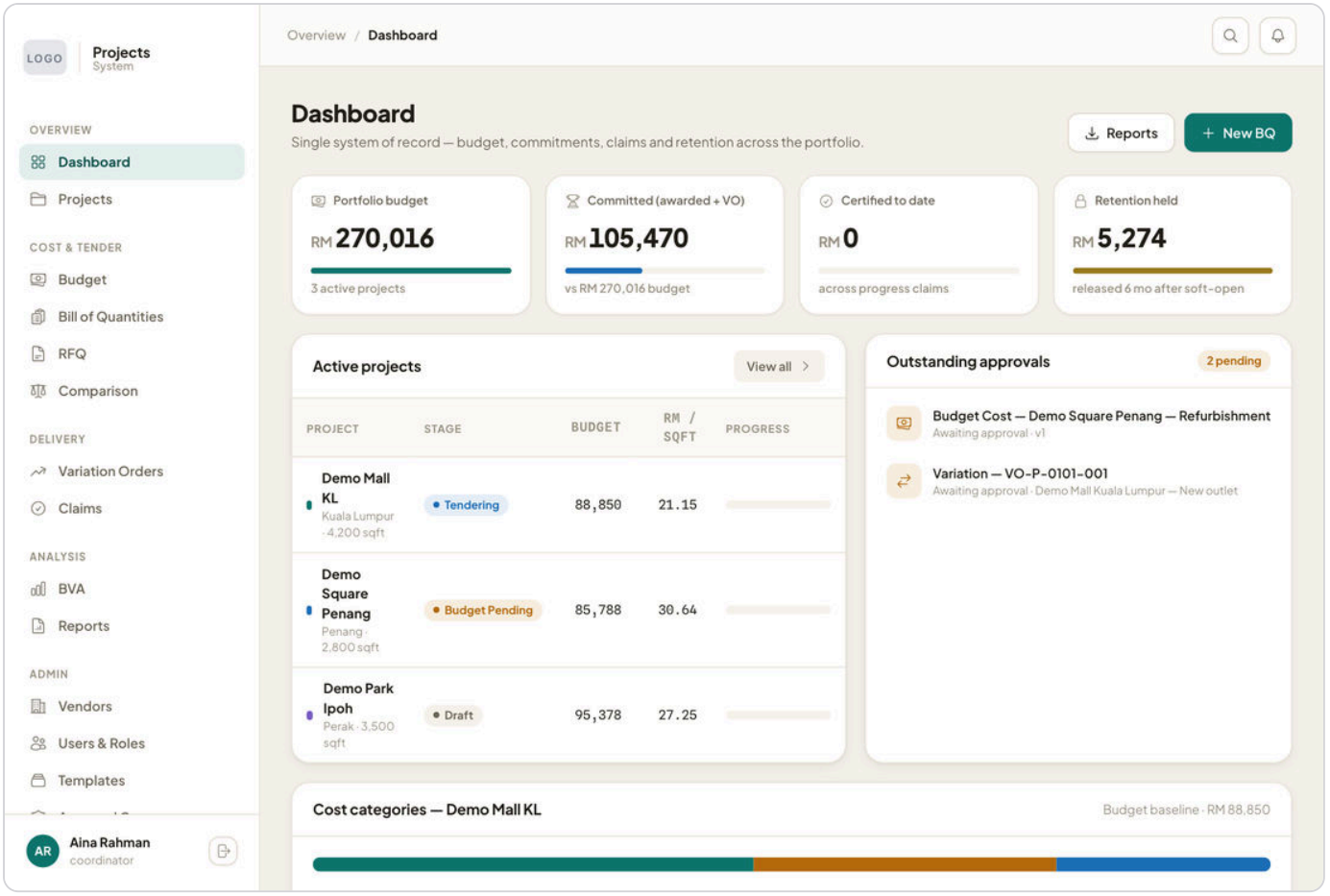
You see only the pages your role allows. Your name and role are at the bottom of the menu, with the sign-out button beside them.

The dashboard

The four boxes at the top add up all projects:

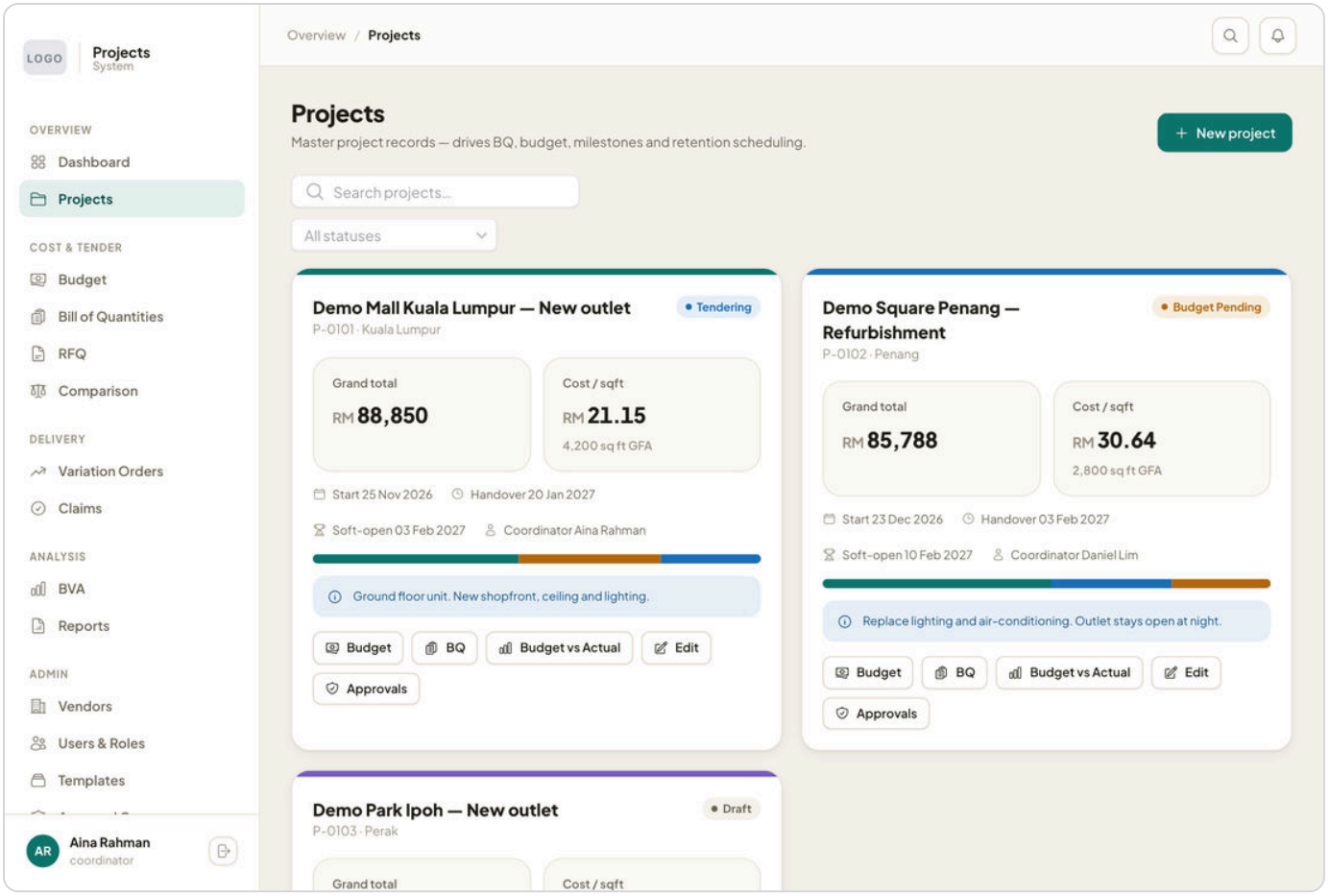
- **Portfolio budget**: the total of every project's budget.
- **Committed (awarded + VO)**: what has been promised to vendors through awards and approved variations.
- **Certified to date**: what has been checked and certified on vendor claims.
- **Retention held**: money held back until after the outlets open.

Active projects lists each project with its stage, budget and cost per square foot. **Outstanding approvals** on the right lists documents waiting for someone to approve them.



The project list

Open **Projects** to see one card per project: its stage, grand total, cost per square foot, key dates and coordinator. The buttons on each card open its **Budget**, **BQ**, **Budget vs Actual**, **Edit** and **Approvals**. Use **Search projects…** and **All statuses** to narrow the list.

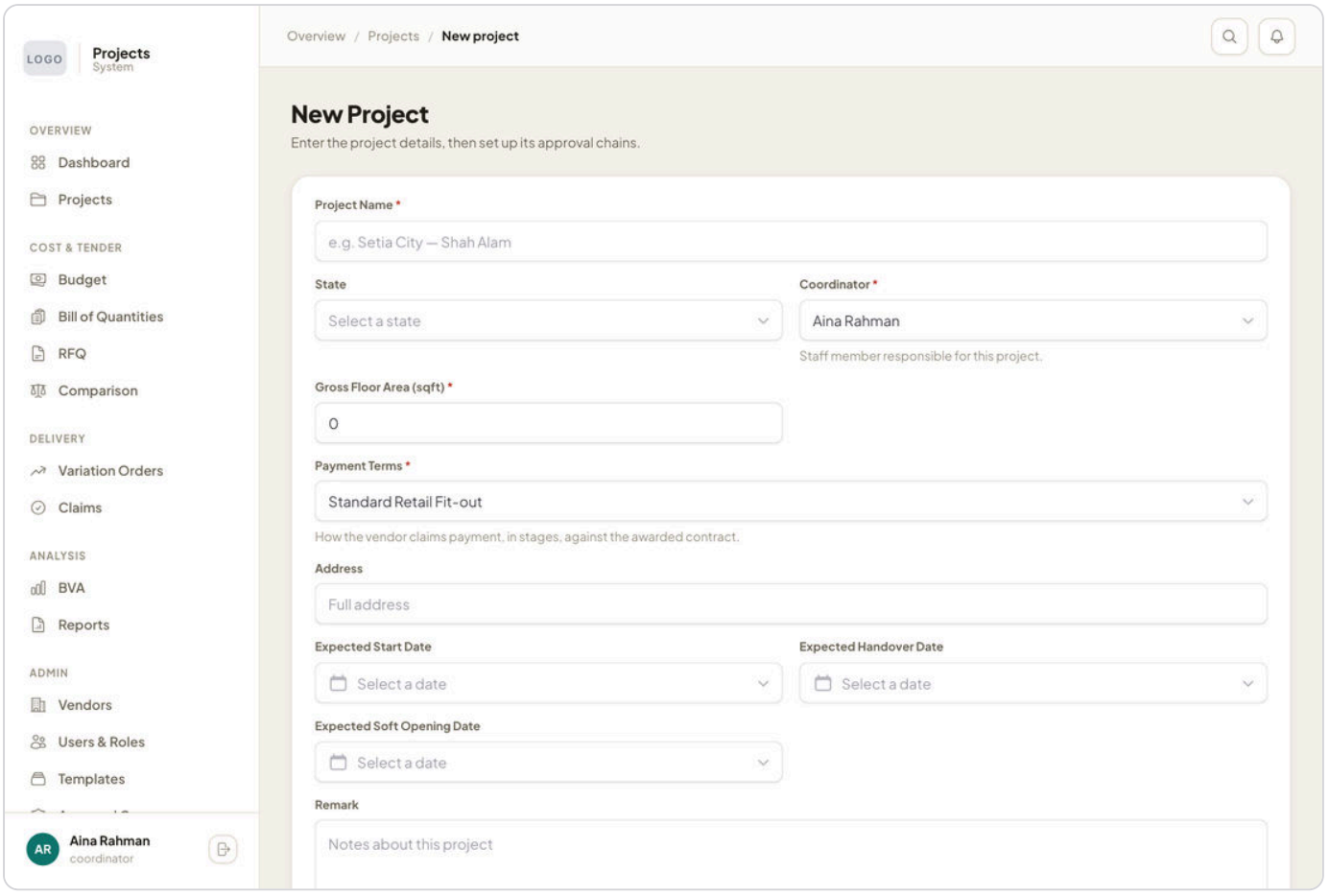

LOGO
Projects
System
OVERVIEW
Dashboard
Projects
COST & TENDER
Budget
Bill of Quantities
RFQ
Comparison
DELIVERY
Variation Orders
Claims
ANALYSIS
BVA
Reports
ADMIN
Vendors
Users & Roles
Templates
AR
Aina Rahman
coordinator
Overview / Projects
Projects
Master project records — drives BQ, budget, milestones and retention scheduling.
+ New project
Search projects...
All statuses
Demo Mall Kuala Lumpur — New outlet
Tendering
P-0101 · Kuala Lumpur
Grand total
RM 88,850
Cost / sqft
RM 21.15
4,200 sq ft GFA
Start 25 Nov 2026
Handover 20 Jan 2027
Soft-open 03 Feb 2027
Coordinator Aina Rahman
Ground floor unit. New shopfront, ceiling and lighting.
Budget
BQ
Budget vs Actual
Edit
Approvals
Demo Square Penang — Refurbishment
Budget Pending
P-0102 · Penang
Grand total
RM 85,788
Cost / sqft
RM 30.64
2,800 sq ft GFA
Start 23 Dec 2026
Handover 03 Feb 2027
Soft-open 10 Feb 2027
Coordinator Daniel Lim
Replace lighting and air-conditioning. Outlet stays open at night.
Budget
BQ
Budget vs Actual
Edit
Approvals
Demo Park Ipoh — New outlet
Draft
P-0103 · Perak
Grand total
Cost / sqft

PROJECT MANAGEMENT

Create a project

For: Coordinators

1. Open **Projects** and press **New project** at the top right.
2. Fill in **Project Name** and **Gross Floor Area (sqft)**. Both are required.
3. Check **Coordinator**. It starts with your name; pick someone else if they will run the project.
4. Pick the **Payment Terms**. This decides the stages in which the vendor will be paid (for example down payment, progress, balance and retention).
5. Add the **State**, **Address**, the three expected dates and a **Remark** if you have them.
6. Press **Next: Approvals**.

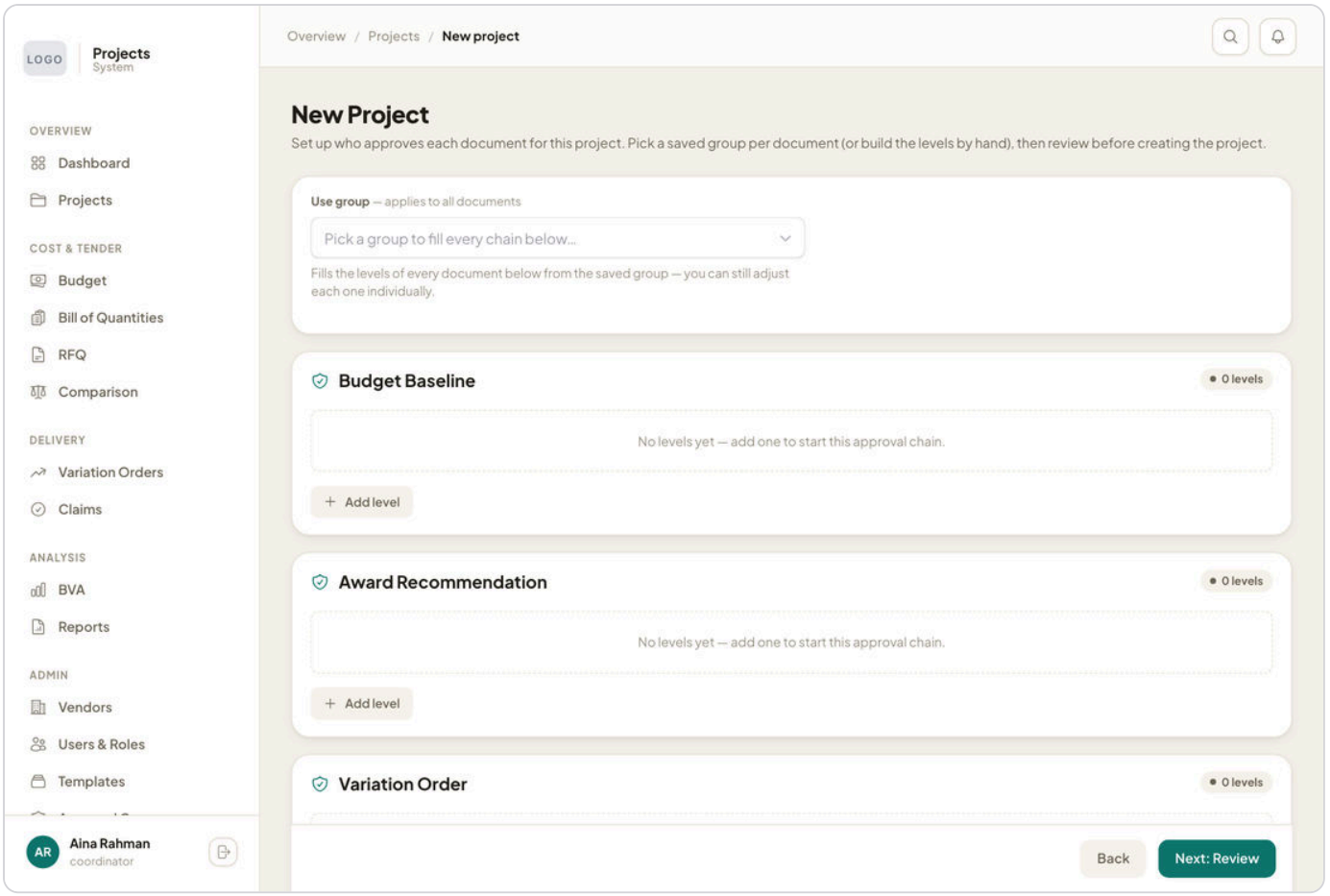


Choose who approves

The second step lists every document of the project: budget, award, variation order, progress claim, final claim, milestone certification and retention release. Each starts empty.

1. In **Use group**, pick a saved group. It fills every document's approval chain at once.
2. Change any single document if it needs different approvers, with **Add level** or **Remove**.
3. Press **Next: Review**, check the summary, and create the project.

Every document needs at least one level before you can continue. If no saved group fits, ask an administrator to add one under **Group Templates**.



You can change the details later with **Edit** on the project card. The approval chains lock once the project's budget is approved.

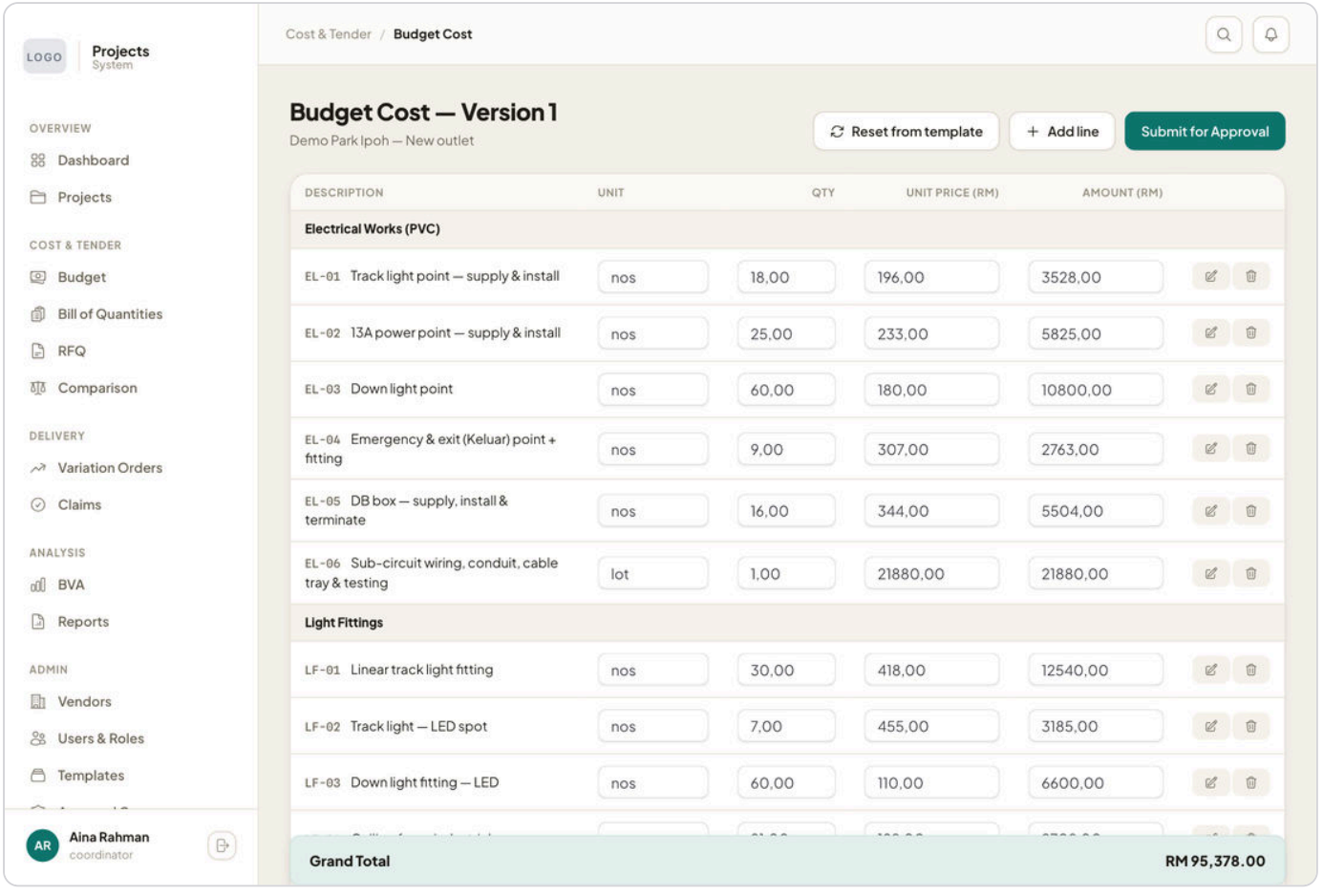
PROJECT MANAGEMENT

Prepare a budget

For: Coordinators

The budget is the approved cost of the project. Once approved, it becomes the figure every later cost is compared with.

1. Open **Budget** and press **New Budget**. Pick the **Project** and the **Template** to start from, then press **Create Budget**.
2. The budget opens with every item of the template. For each item that applies, type the **QTY** and **UNIT PRICE (RM)**. The **AMOUNT (RM)** is worked out for you.
3. Leave items that do not apply at zero.
4. Use **Add line** for anything the template does not have.
5. Press **Submit for Approval**. If some items are still at zero, you are warned first.



Reset from template puts the budget back to the template. It wipes everything you typed, so use it only to start again.

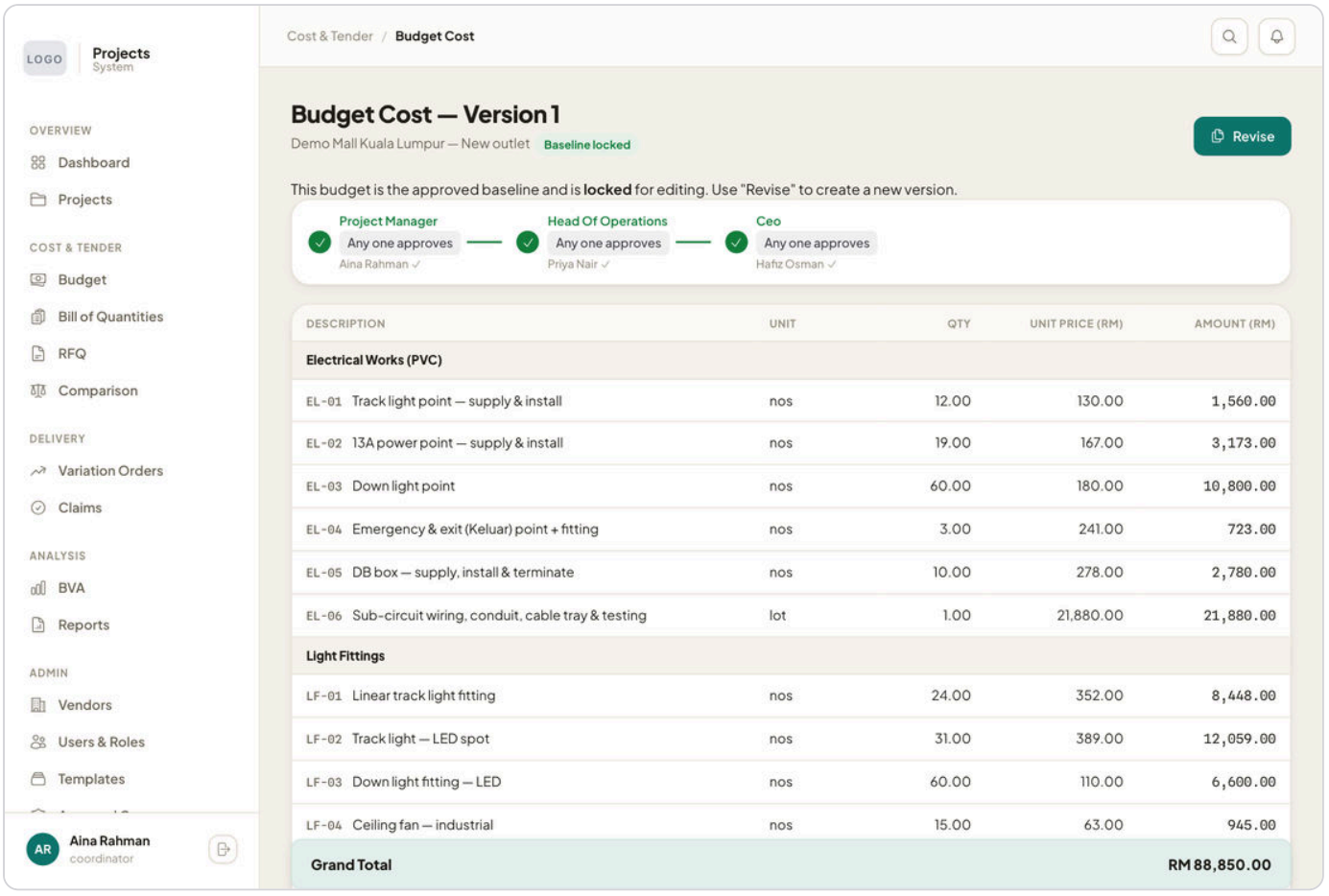
Percentage items

Some items are a percentage of the rest of the budget (for example "8% of total, maximum 15k"). Their amount fills in by itself from the other items and stops at the maximum. To keep an item out of that base, open the item with its pencil button and switch on **Exclude from % base**. The item still counts in the grand total.

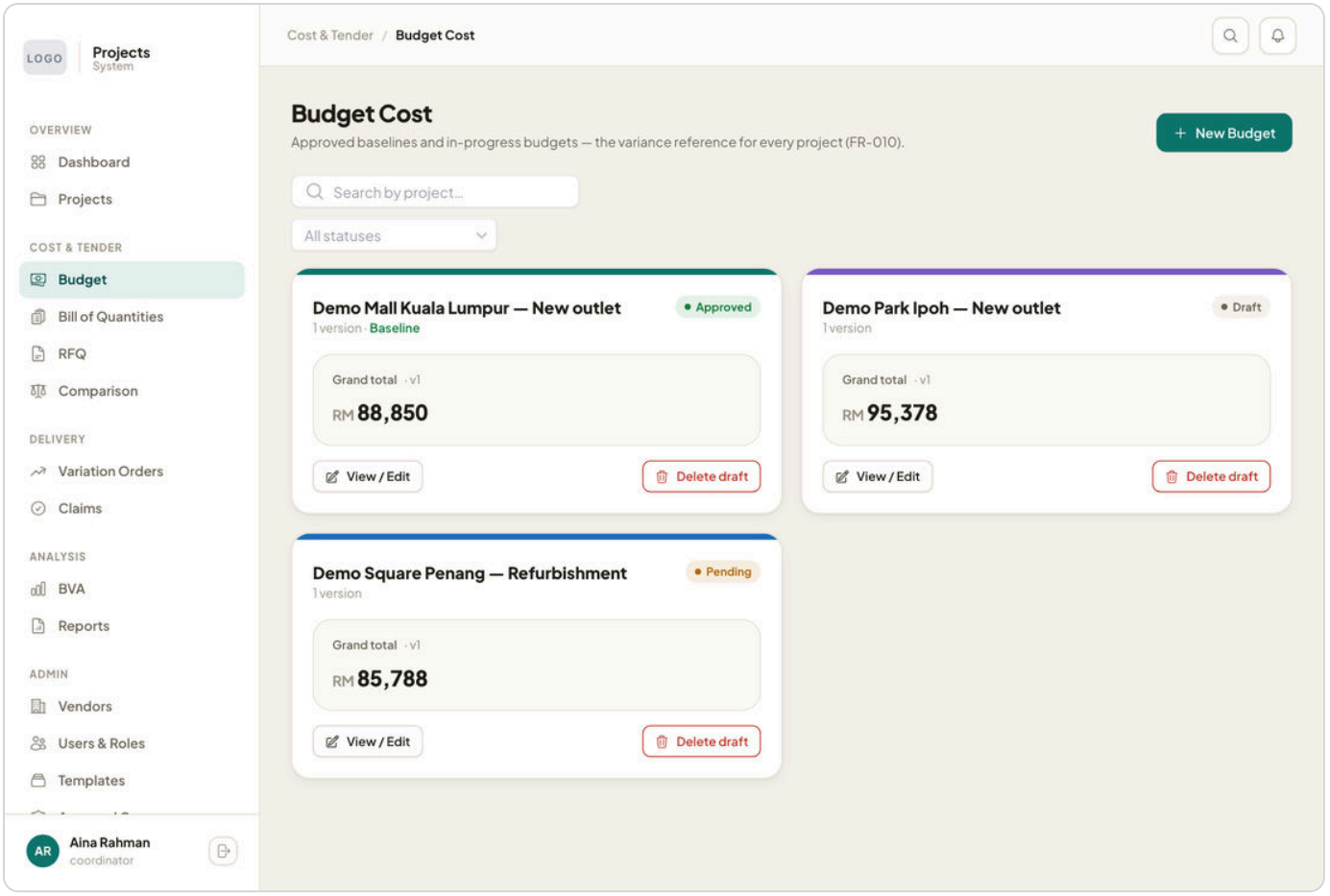
After you submit

- The budget cannot be edited while it is being approved.
- Items left at zero are hidden from the approvers. Nothing is deleted: if the budget is sent back, every item comes back.
- When the last approver says yes, the budget shows **Baseline locked**, and a draft bill of quantities is made from the priced items.

To change an approved budget, press **Revise**. This starts a new version that goes through approval again.



The **Budget** page lists every project's budget with its status: **Draft**, **Pending** or **Approved**.


LOGO
Projects
System
OVERVIEW
Dashboard
Projects
COST & TENDER
Budget
Bill of Quantities
RFQ
Comparison
DELIVERY
Variation Orders
Claims
ANALYSIS
BVA
Reports
ADMIN
Vendors
Users & Roles
Templates
AR
Aina Rahman
coordinator
Cost & Tender / Budget Cost
Budget Cost
Approved baselines and in-progress budgets — the variance reference for every project (FR-010).
+ New Budget
Search by project...
All statuses
Demo Mall Kuala Lumpur — New outlet
Approved
1 version · Baseline
Grand total · v1
RM 88,850
View / Edit
Delete draft
Demo Park Ipoh — New outlet
Draft
1 version
Grand total · v1
RM 95,378
View / Edit
Delete draft
Demo Square Penang — Refurbishment
Pending
1 version
Grand total · v1
RM 85,788
View / Edit
Delete draft

Approve a document

For: Approvers

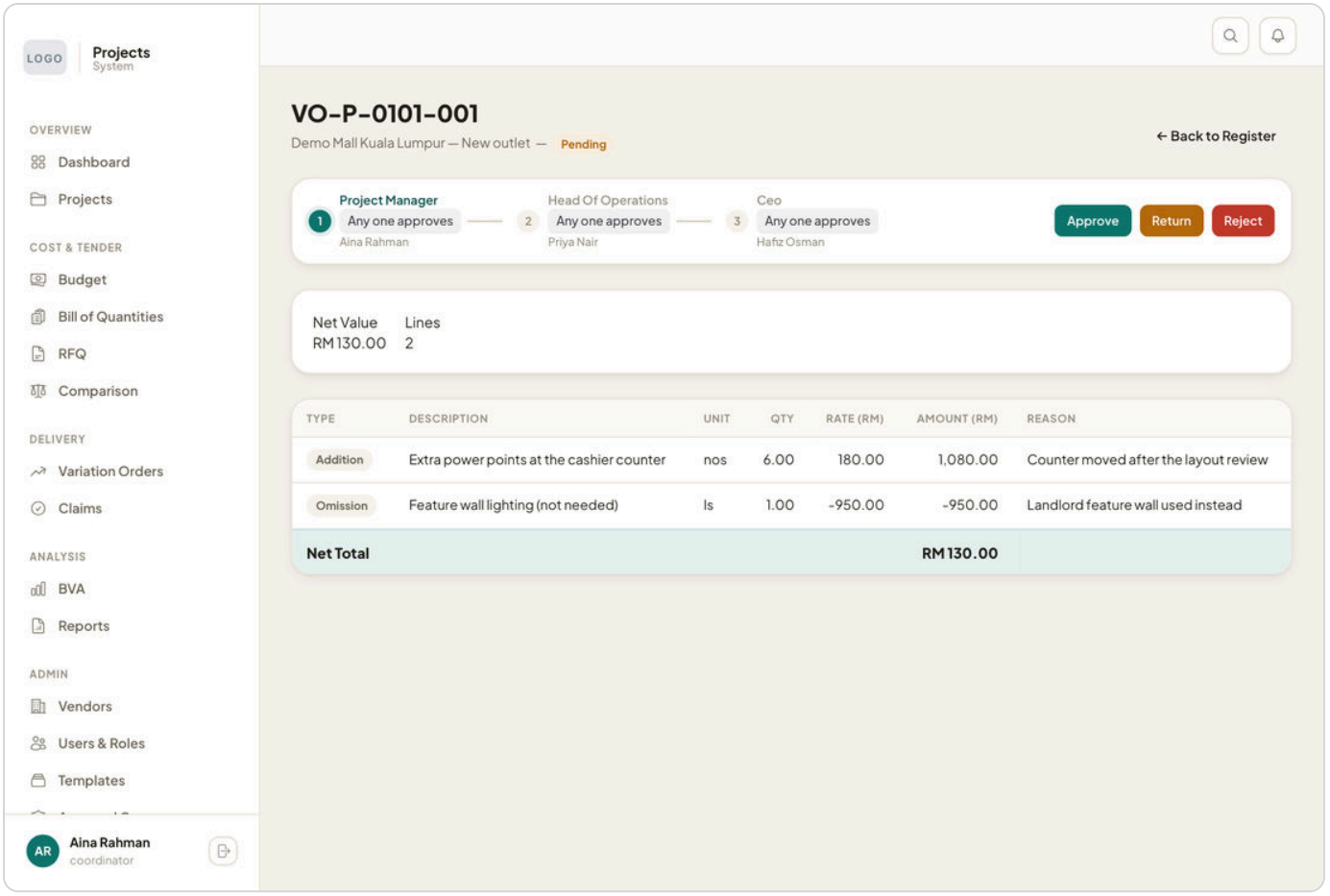
Budgets, awards, variation orders and claims all go through the same kind of approval. The bar at the top of the document shows the chain:

- Each step is one level, with its name (for example **Project Manager**), its rule and the people who can approve it.
- **Any one approves** means one person's yes clears the level. **All must approve** means everyone listed must say yes.
- A tick appears beside each person who has approved, and the step turns green when the level clears.

Documents waiting for you appear under **Outstanding approvals** on the dashboard.

Make your decision

1. Open the document from **Outstanding approvals**.
2. Read it. On a claim, look at every supporting document first.
3. Press one of the buttons on the right of the bar:
    - **Approve** passes it to the next level, or finishes the chain if you are last.
    - **Return** sends it back to the person who prepared it, to fix and send again.
    - **Reject** ends it.



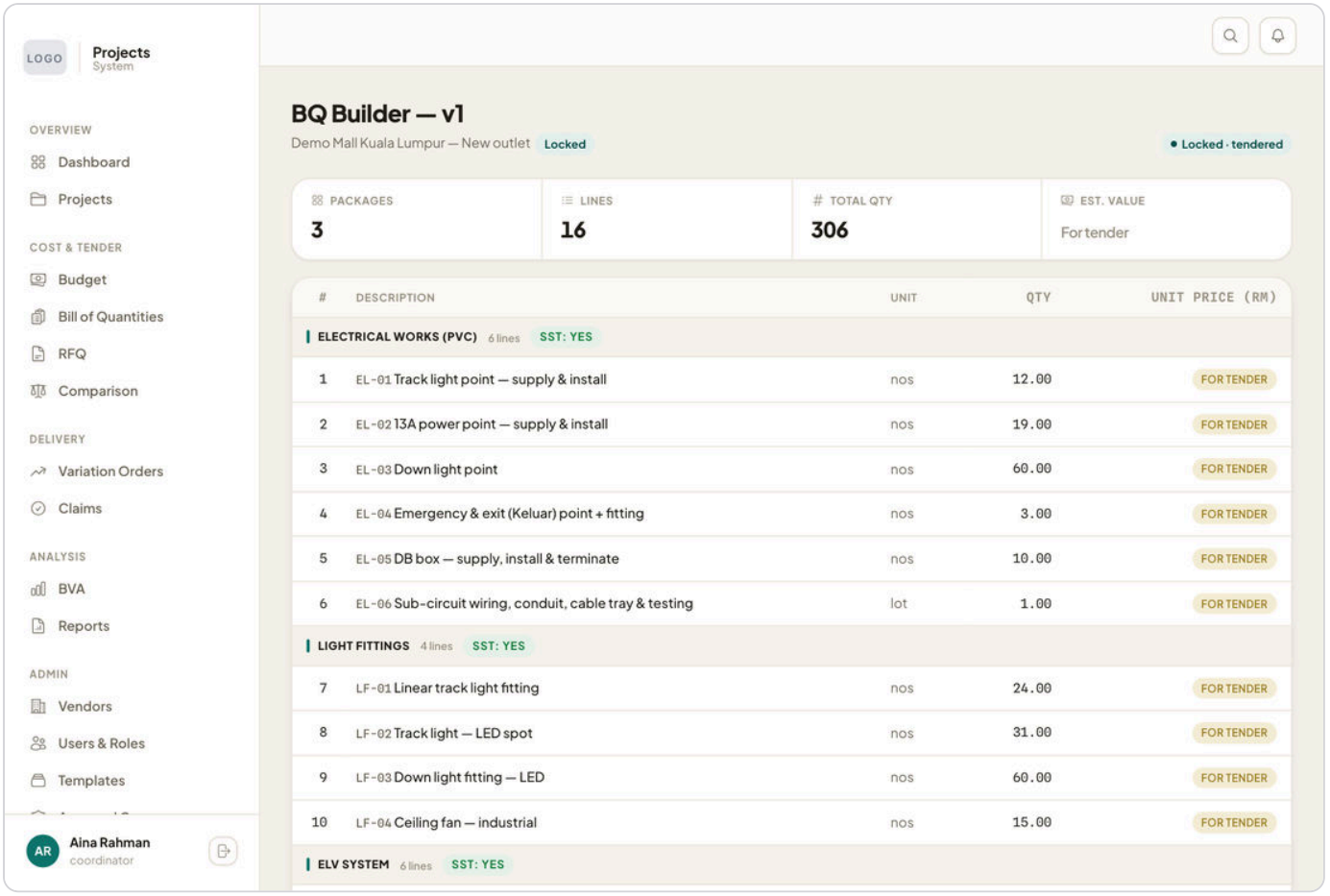
The buttons appear only when it is your turn. If you are waiting on someone else, you see **Resend notification** instead, which reminds the people at the current level.

Prepare the bill of quantities

For: Coordinators

The bill of quantities (BQ) is the list of work that vendors will price. You usually do not start it by hand: when a budget is approved, a draft BQ is made with only the items that had an amount. Each item shows **FOR TENDER**, because the vendors' prices are still to come.

1. Open **Bill of Quantities** and press **View / Edit** on the project's BQ.
2. Check the items and quantities. Add an item to a group with that group's **Add line**, or bring in more items with **Load from Template**.
3. When the list is right, press **Issue RFQ** to ask vendors for quotes.



Once an RFQ goes out, the BQ shows **Locked · tendered** and can no longer be changed, so every vendor prices the same list.

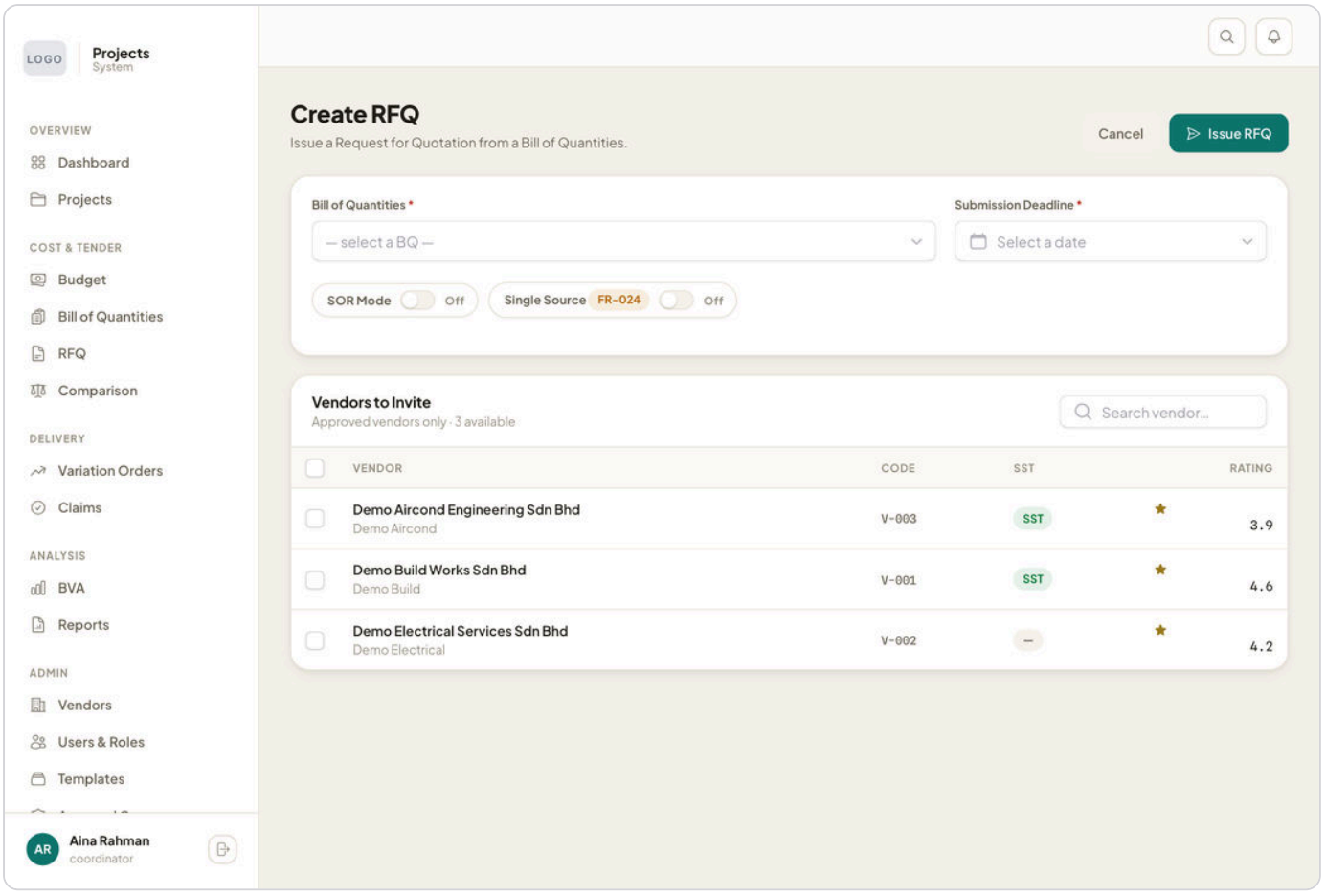
PROJECT MANAGEMENT

Ask vendors for quotes

For: Coordinators

An RFQ (request for quotation) sends the bill of quantities to the vendors you choose.

1. Open **RFQ** and press **Create RFQ**, or press **Issue RFQ** on the bill of quantities.
2. Pick the **Bill of Quantities** and the **Submission Deadline**.
3. Tick the vendors to invite under **Vendors to Invite**. Only approved vendors are listed.
4. Press **Issue RFQ**.

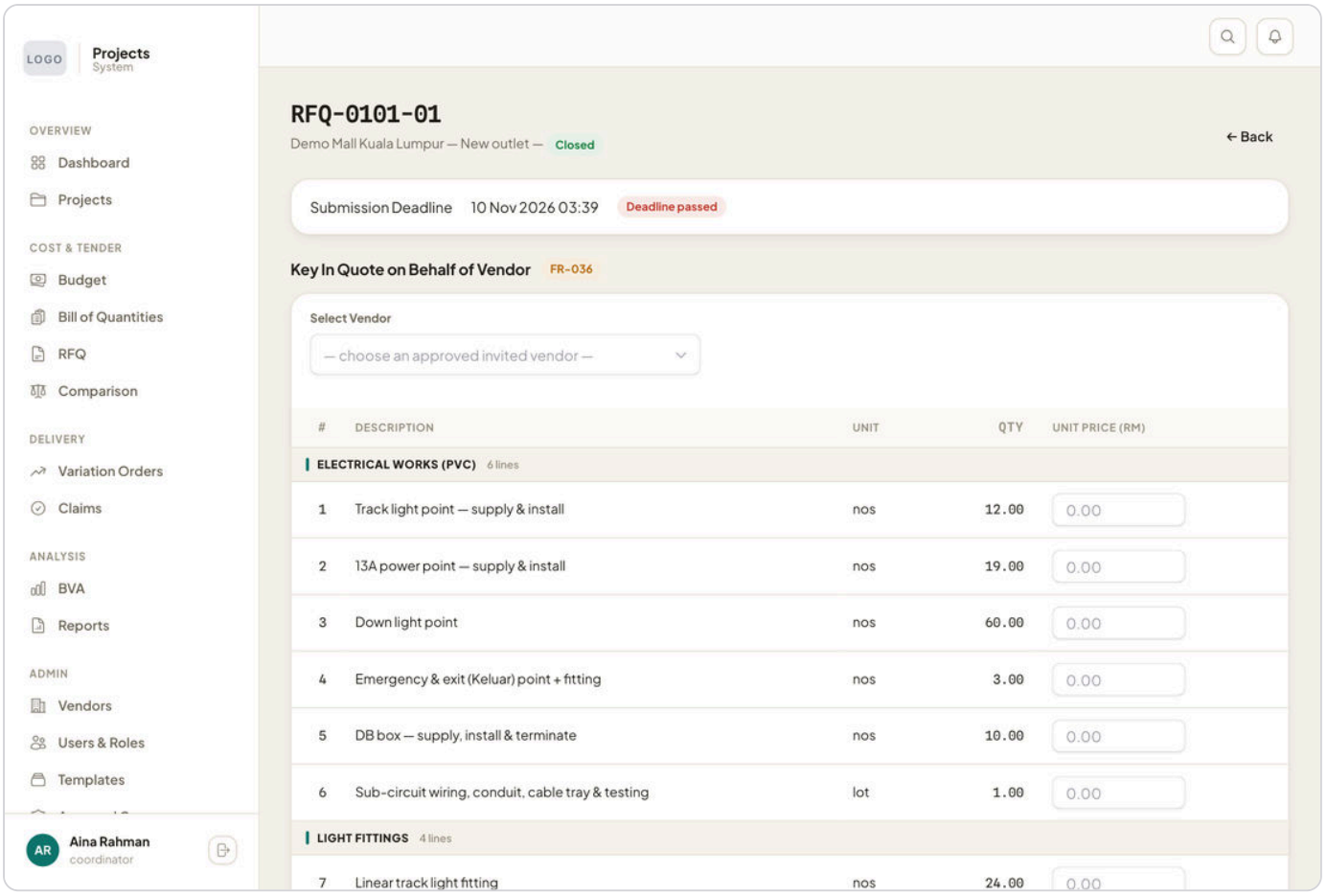


Single Source is for work only one vendor can do. Switch it on when you invite a single vendor on purpose.

The invited vendors see the request on their own screens and price it there. The **RFQ** page lists every open request with its deadline and number of vendors.

A vendor who cannot use the screens

If a vendor sends the quote on paper or by email, open the RFQ and use **Key In Quote on Behalf of Vendor**: pick the vendor, type the prices and press **Submit Staff-Keyed Quote**. The bottom of the page shows each invited vendor and whether they have sent their quote.

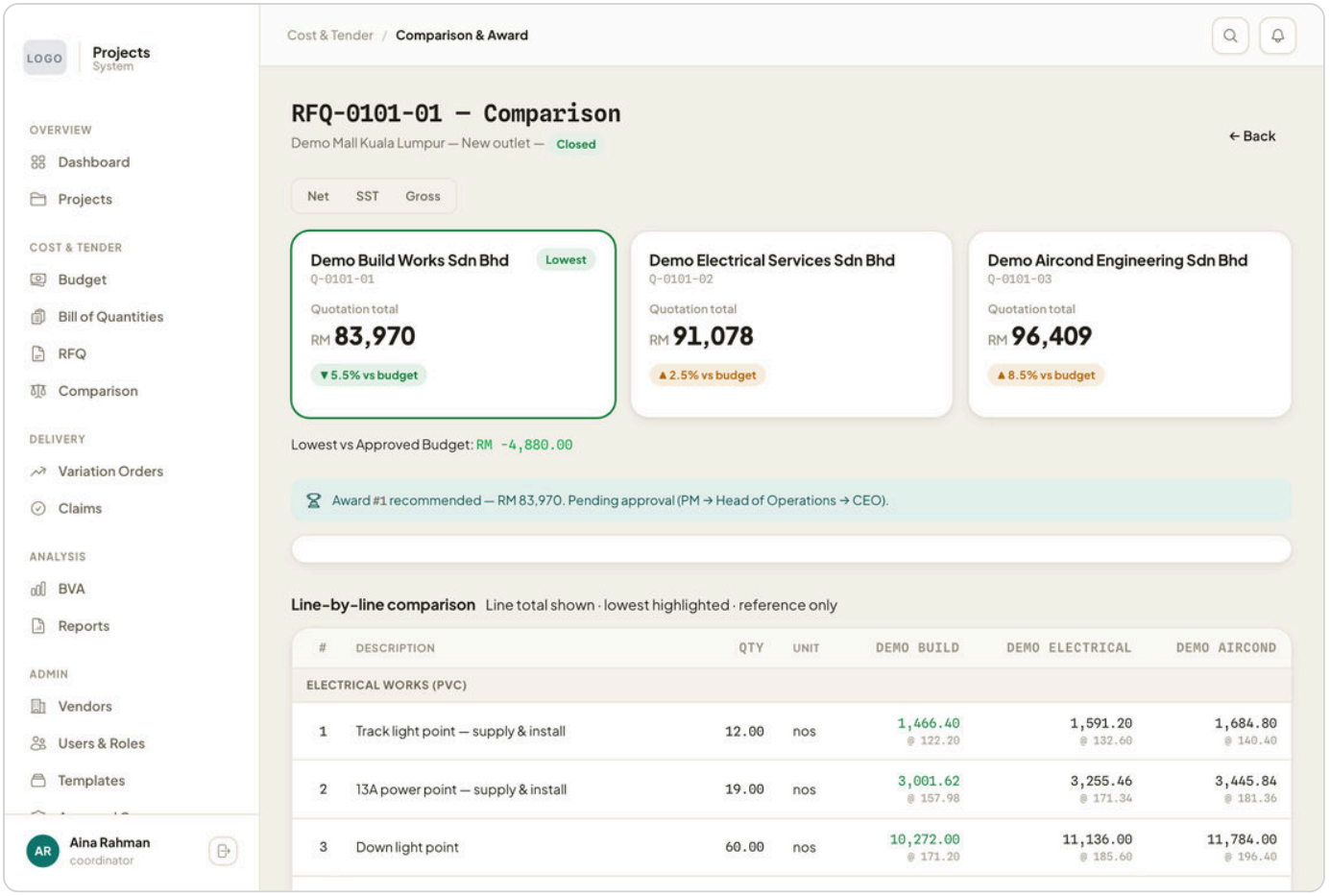


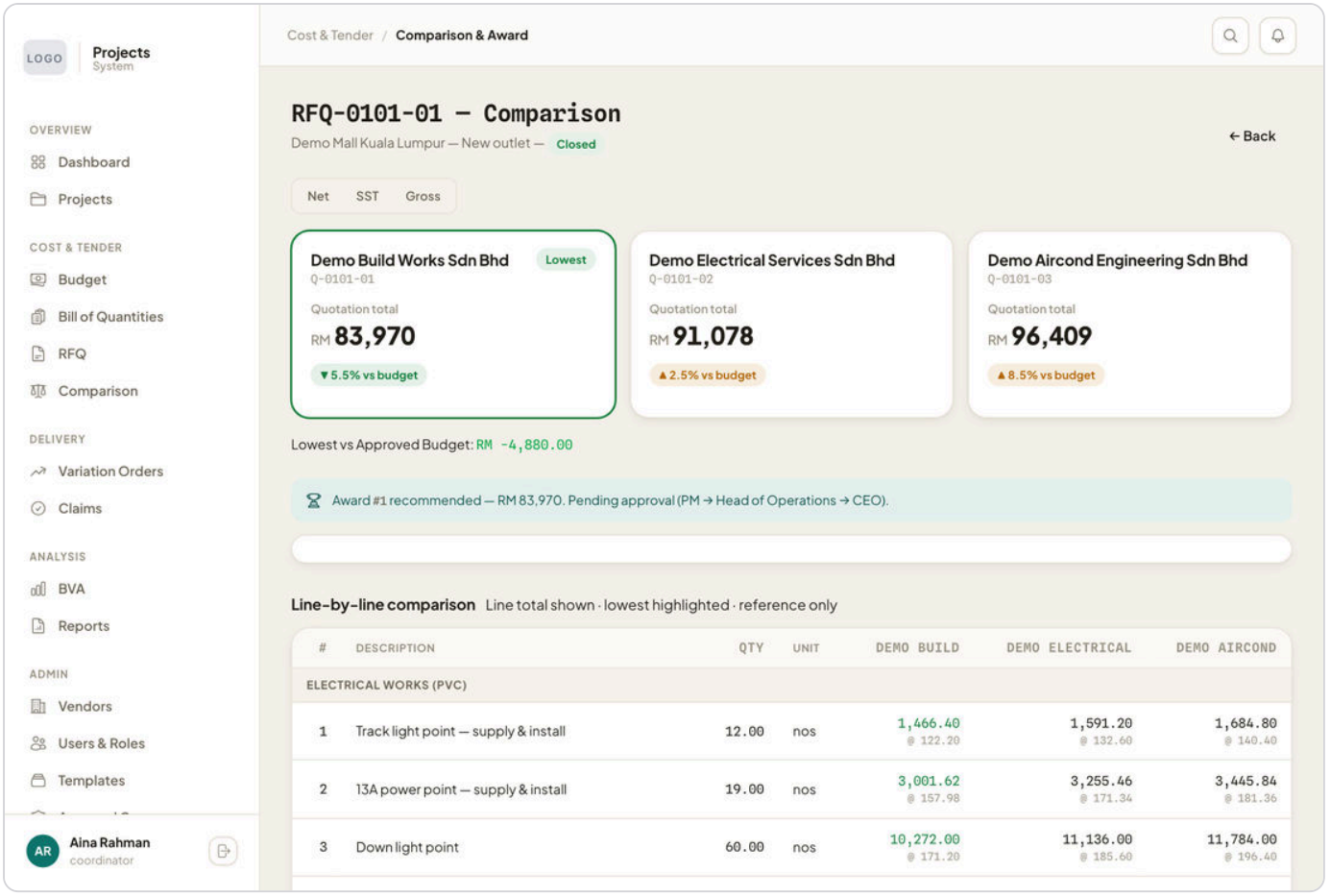
PROJECT MANAGEMENT

Compare quotes and award the work

For: Coordinators and project managers

1. Open **Comparison**. Requests with at least one quote are listed. Press **Compare**.
2. Each vendor has a card with the quote total and how far it is above or below the approved budget. The lowest is marked **Lowest**. Switch between **Net**, **SST** and **Gross** to see the totals with or without tax.
3. Scroll down to **Line-by-line comparison** to see each vendor's price for every item. The lowest price on each line is highlighted.





Award the contract

1. Press the card of the vendor you choose.
2. Check each vendor's extra items, then press **I have reviewed MISC items — Proceed**. A vendor who lists required extras separately can look dearer than one who leaves them out and charges them later.
3. Type the **Justification**, for example why you did not pick the lowest quote.
4. Press **Recommend & submit for approval**.

The whole quote goes to the chosen vendor, and the award goes through its approval chain. Once approved, the contract value counts as committed, and the vendor can start claiming payments.

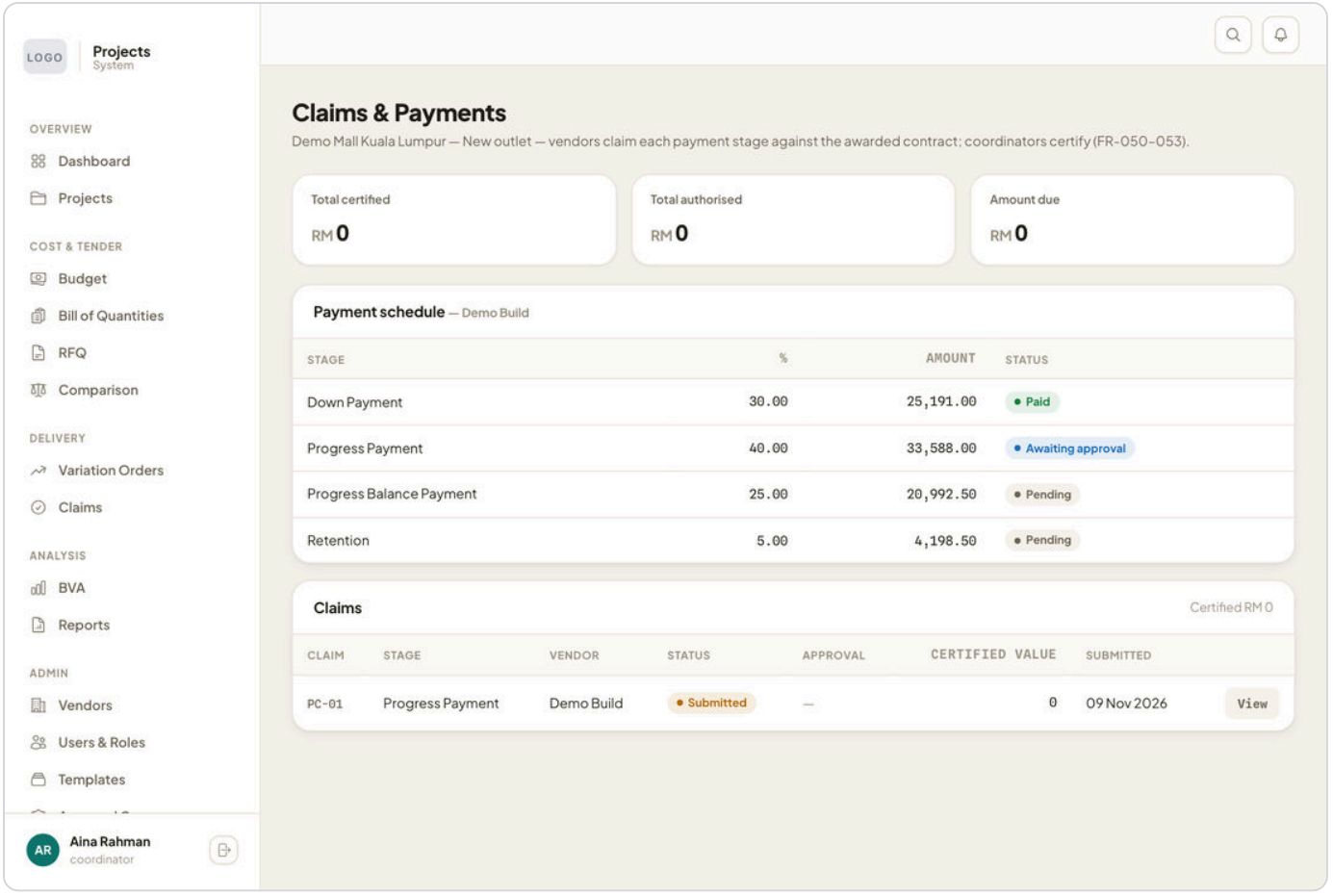
PROJECT MANAGEMENT

Check and certify a claim

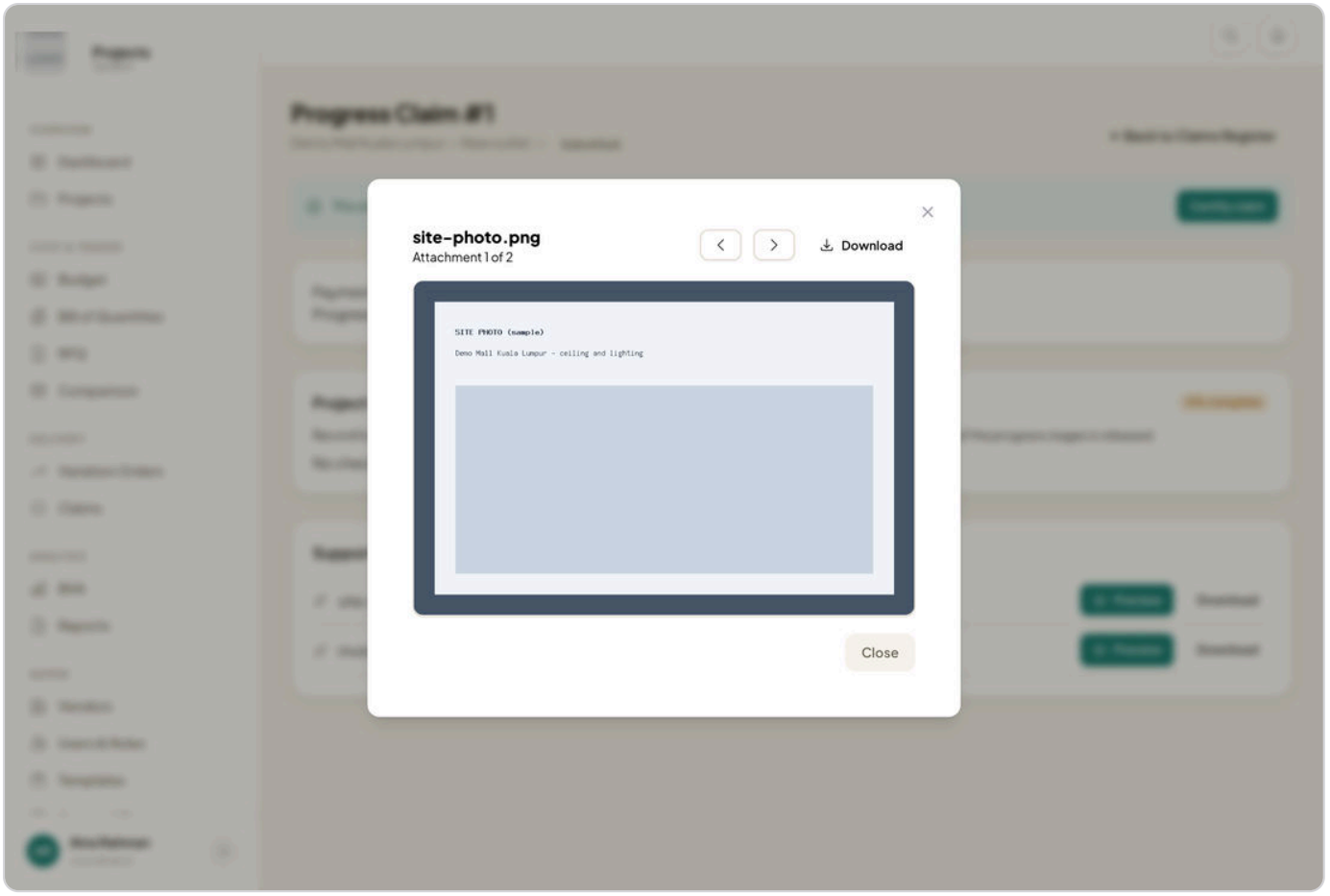
For: Coordinators

Vendors are paid in stages, for example a down payment, progress payments, the balance and the retention. The vendor claims each stage on their own screens, with photos and invoices attached. You check the claim and certify it before it goes for approval.

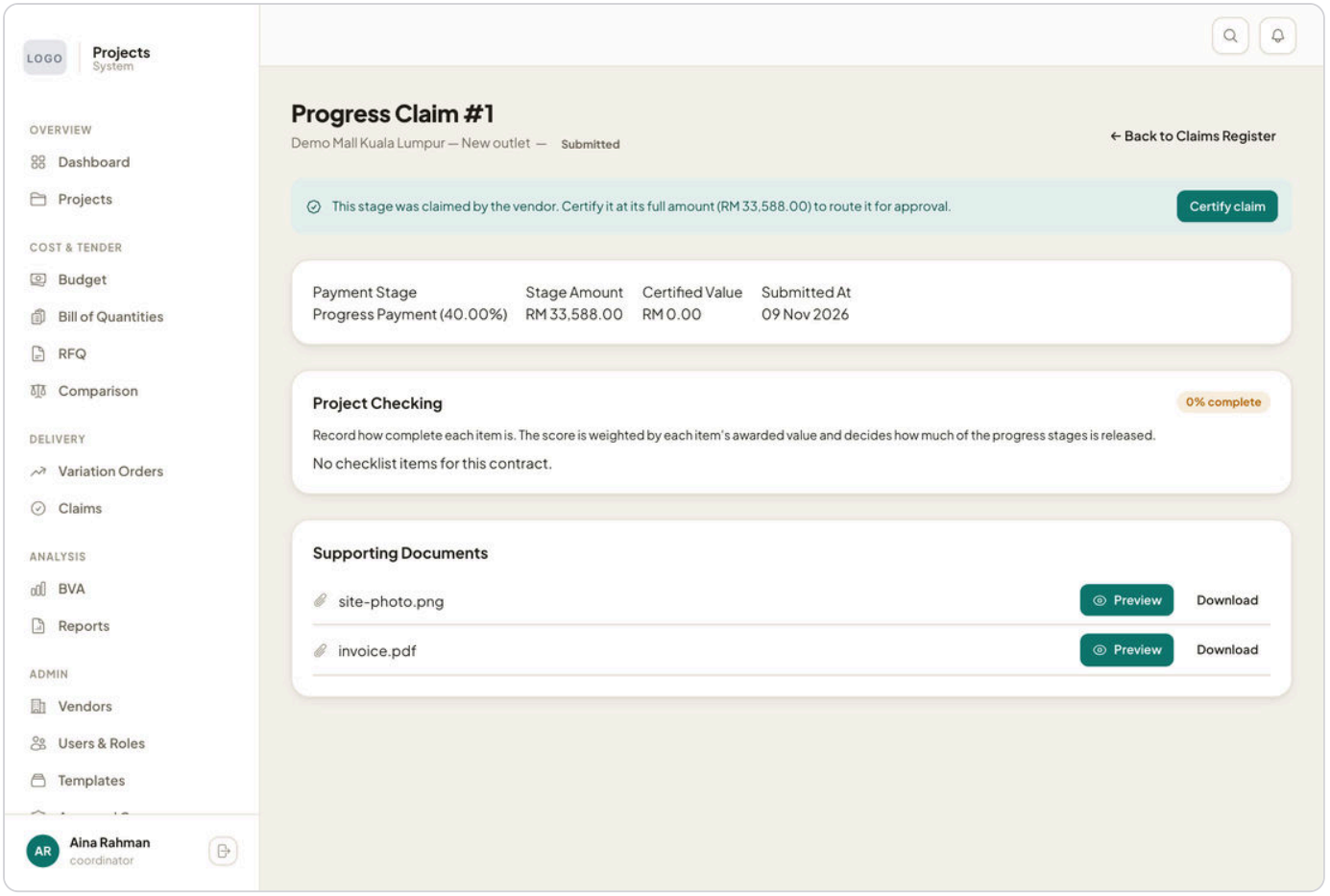
1. Open **Claims** and press **Open Register** on the project.
2. **Payment schedule** shows every stage with its amount and status. Below it, **Claims** lists what the vendor has claimed. Press **View** on a claim.



3. Under **Supporting Documents**, press **Preview** on each file. Pictures and PDFs open on the page; use the arrows to move from one file to the next. Word and Excel files can only be downloaded.



4. If the work is done, press **Certify claim**.
5. Then press **Submit for approval** to send it to the approvers.



Progress stages and project checking

For progress stages, the amount you can certify can depend on **Project Checking**: a list of the contract's items where you record how complete each one is. The page then says how much of the stage it releases. If no work is recorded yet, it asks you to record progress before certifying. If the contract has no checklist, the stage is certified at its full amount.

Stages are paid in order. The vendor cannot claim a stage until the one before it is certified.

PROJECT MANAGEMENT

Handle a variation order

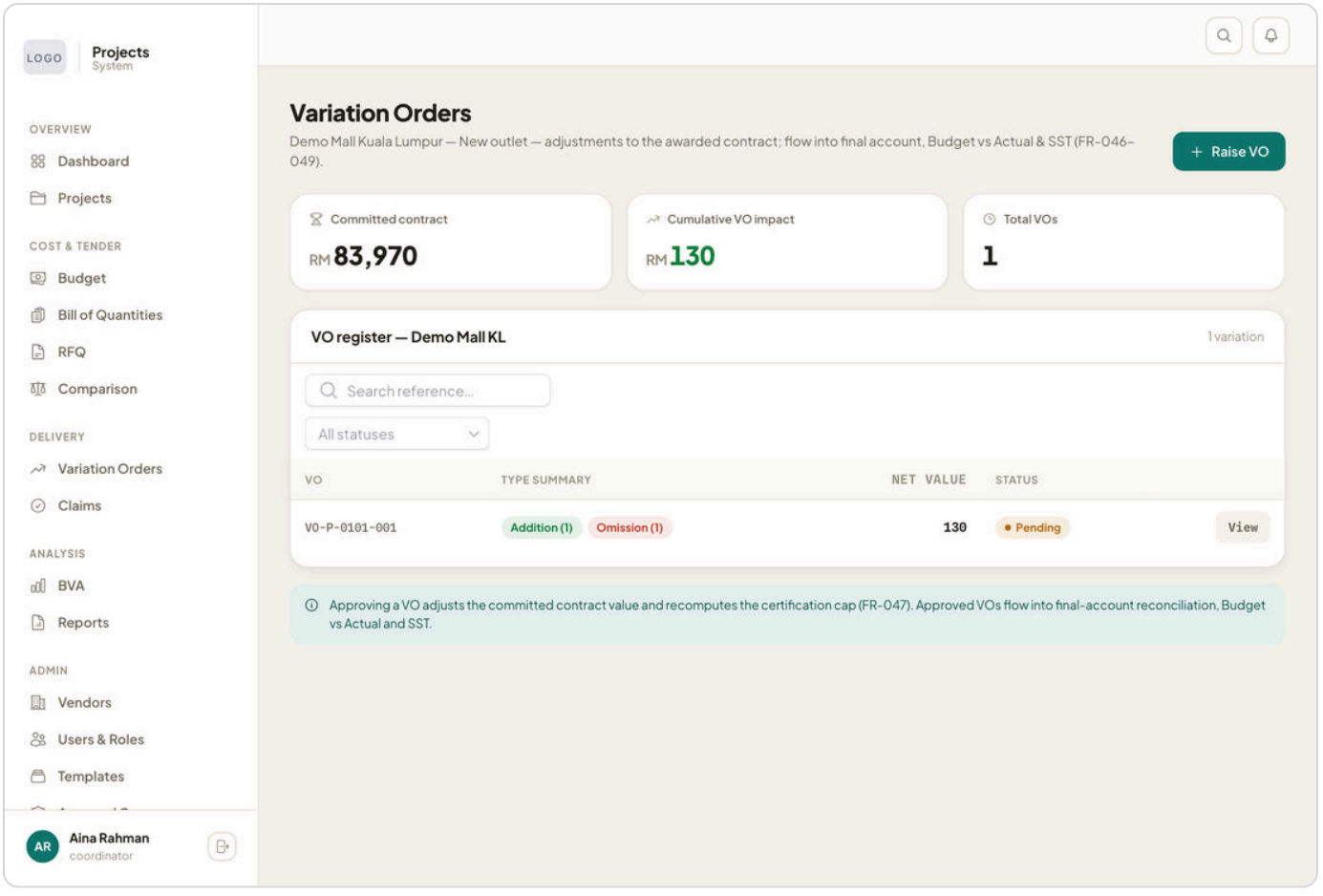
For: Coordinators and approvers

A variation order (VO) records a change to the work after the contract is awarded: extra work (**Addition**), work taken out (**Omission**), a new price for an item, or a new item. It changes the contract value once it is approved.

Raise one

1. Open **Variation Orders** and press **Open Register** on the project.
2. Press **Raise VO**.
3. Fill in one line for each change: the type, a description, the unit, quantity, rate and reason. Press **+ Add Line** for the next one.
4. Press **Submit Variation Order**. The reference number is given on submission, and the VO goes to its approval chain.

Vendors can also ask for a change from their own screens. Their request appears in the same register for you to review.



The boxes at the top show the **Committed contract**, the **Cumulative VO impact** and the number of VOs. Press **View** on a VO to see its lines and approve it.

If a VO is more than 10% of the contract sum, its page shows a warning that it needs approval from the top of the company. The warning does not stop it.

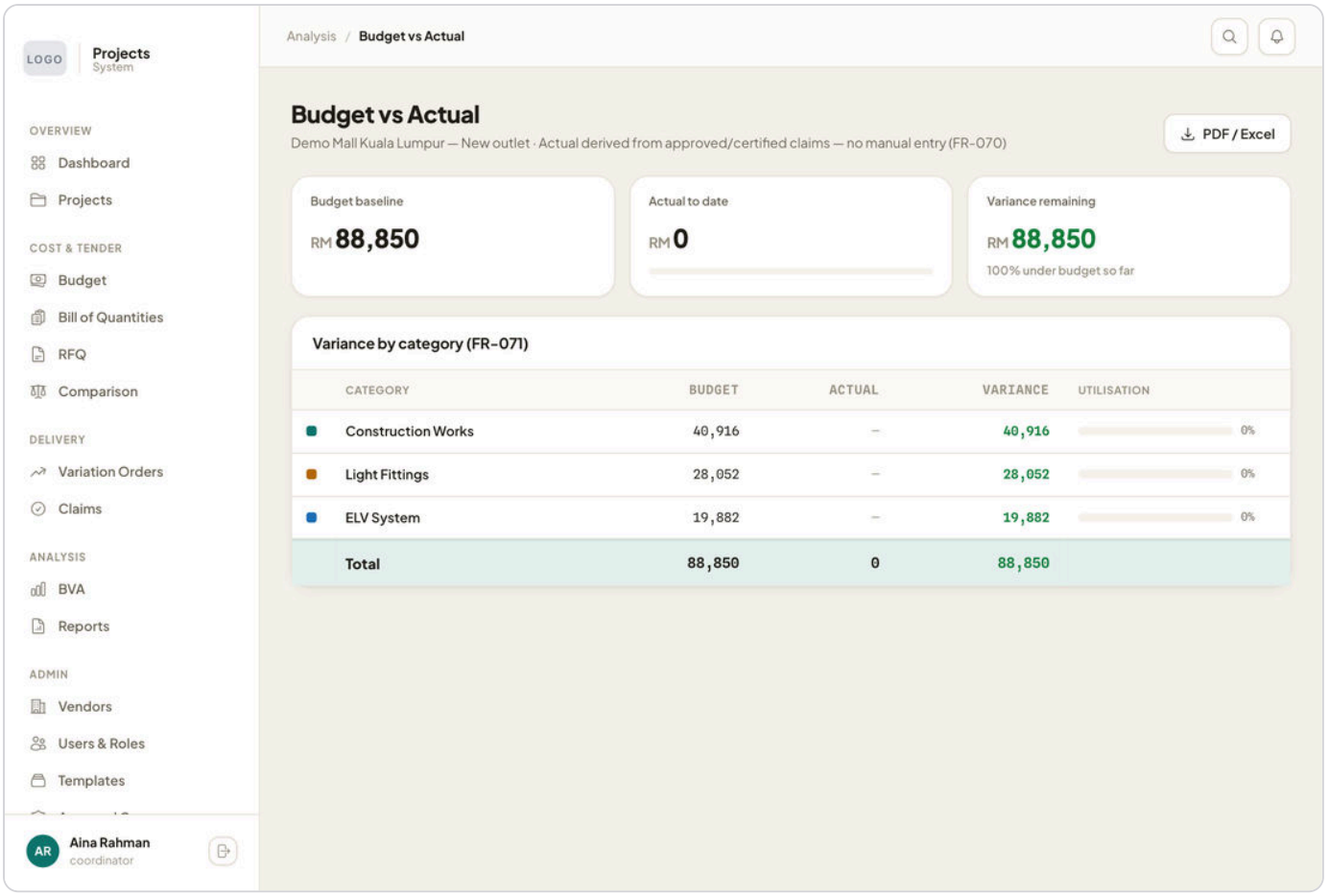
PROJECT MANAGEMENT

Follow costs, reports and retention

For: Managers and finance

Budget against actual spend

Open **BVA**, then pick a project. For each cost category you see the budget, the actual spend so far, what is left, and how much of the budget is used. The actual spend comes from approved and certified claims; nobody types it in. **PDF / Excel** downloads the report.

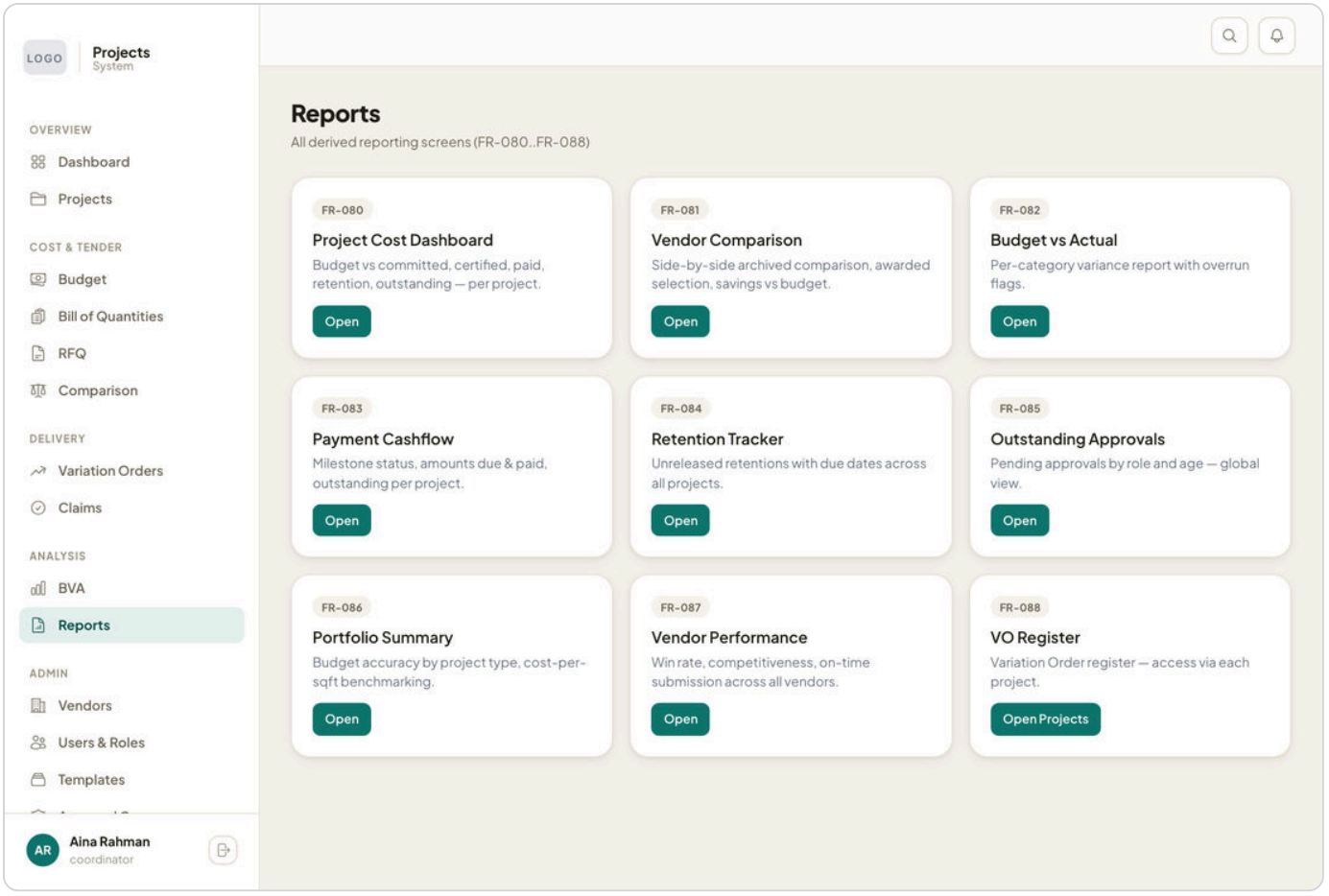


Reports

Reports holds every report in one place. Press **Open** on the one you need:

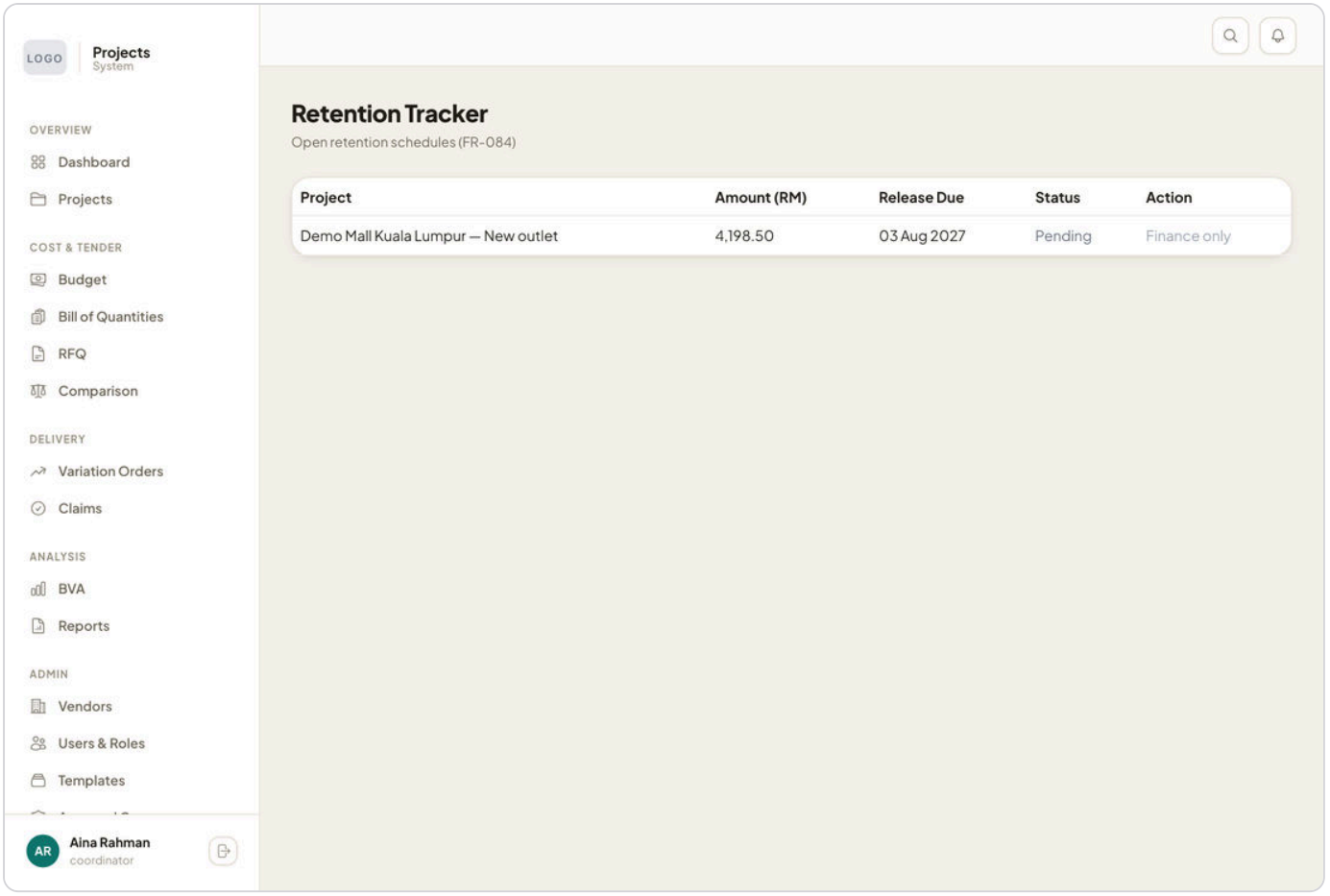
- **Project Cost Dashboard**: budget, committed, certified, paid and retention for each project.
- **Vendor Comparison**: past comparisons and what was saved against the budget.
- **Budget vs Actual**: the report above.
- **Payment Cashflow**: each payment stage, what is due and what is paid.

- **Retention Tracker**: money held back and when it is due.
- **Outstanding Approvals**: everything waiting for approval, by role and age.
- **Portfolio Summary**: how accurate budgets were, and cost per square foot by project type.
- **Vendor Performance**: each vendor's win rate and how often they quote on time.
- **VO Register**: opened from each project.



Retention

Retention is the part of a contract held back until some months after the outlet opens. **Retention Tracker** lists each amount with its release date. When the date comes, a user with the **Finance** role presses **Release**. Everyone else sees **Finance only** in that column.

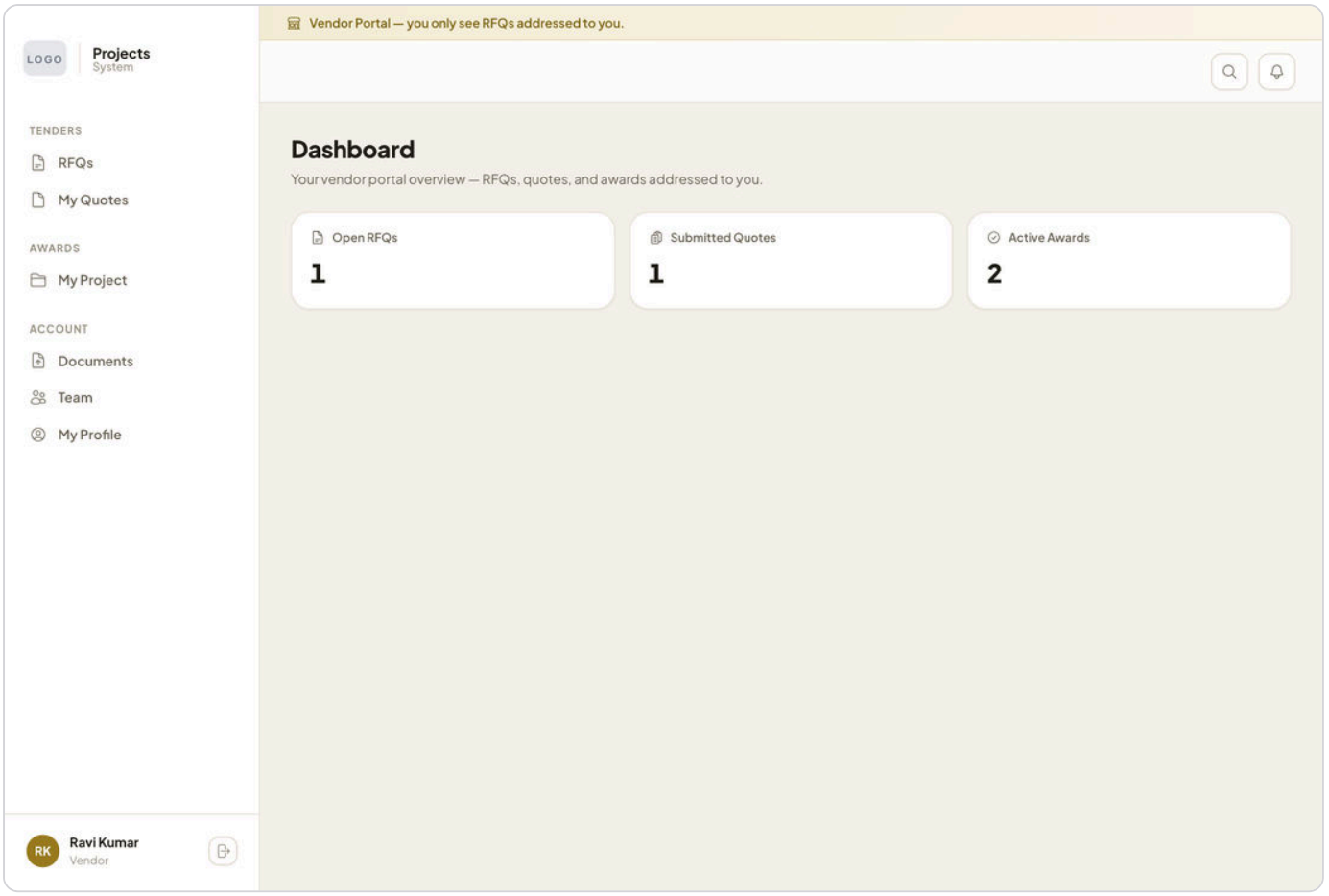

LOGO
Projects
System
OVERVIEW
Dashboard
Projects
COST & TENDER
Budget
Bill of Quantities
RFQ
Comparison
DELIVERY
Variation Orders
Claims
ANALYSIS
BVA
Reports
ADMIN
Vendors
Users & Roles
Templates
AR
Aina Rahman
coordinator
Retention Tracker
Open retention schedules (FR-084)
Project
Amount (RM)
Release Due
Status
Action
Demo Mall Kuala Lumpur — New outlet
4,198.50
03 Aug 2027
Pending
Finance only

Quote for work

For: Vendors

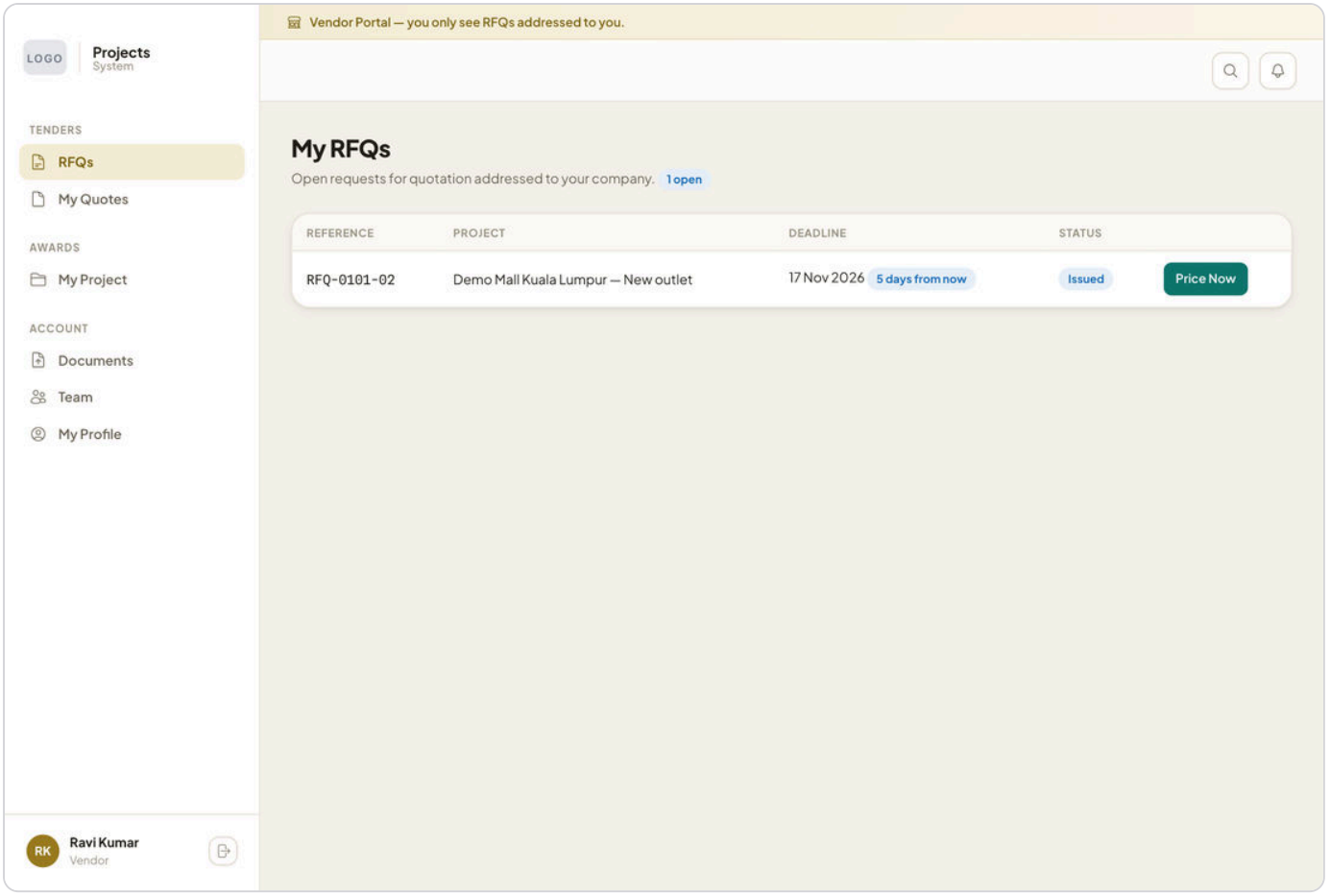
Your company's screens show only the requests addressed to you. The menu has three parts: **Tenders** (**RFQs** and **My Quotes**), **Awards** (**My Project**) and **Account** (**Documents**, **Team** and **My Profile**).

The **Dashboard** counts your **Open RFQs**, **Submitted Quotes** and **Active Awards**.

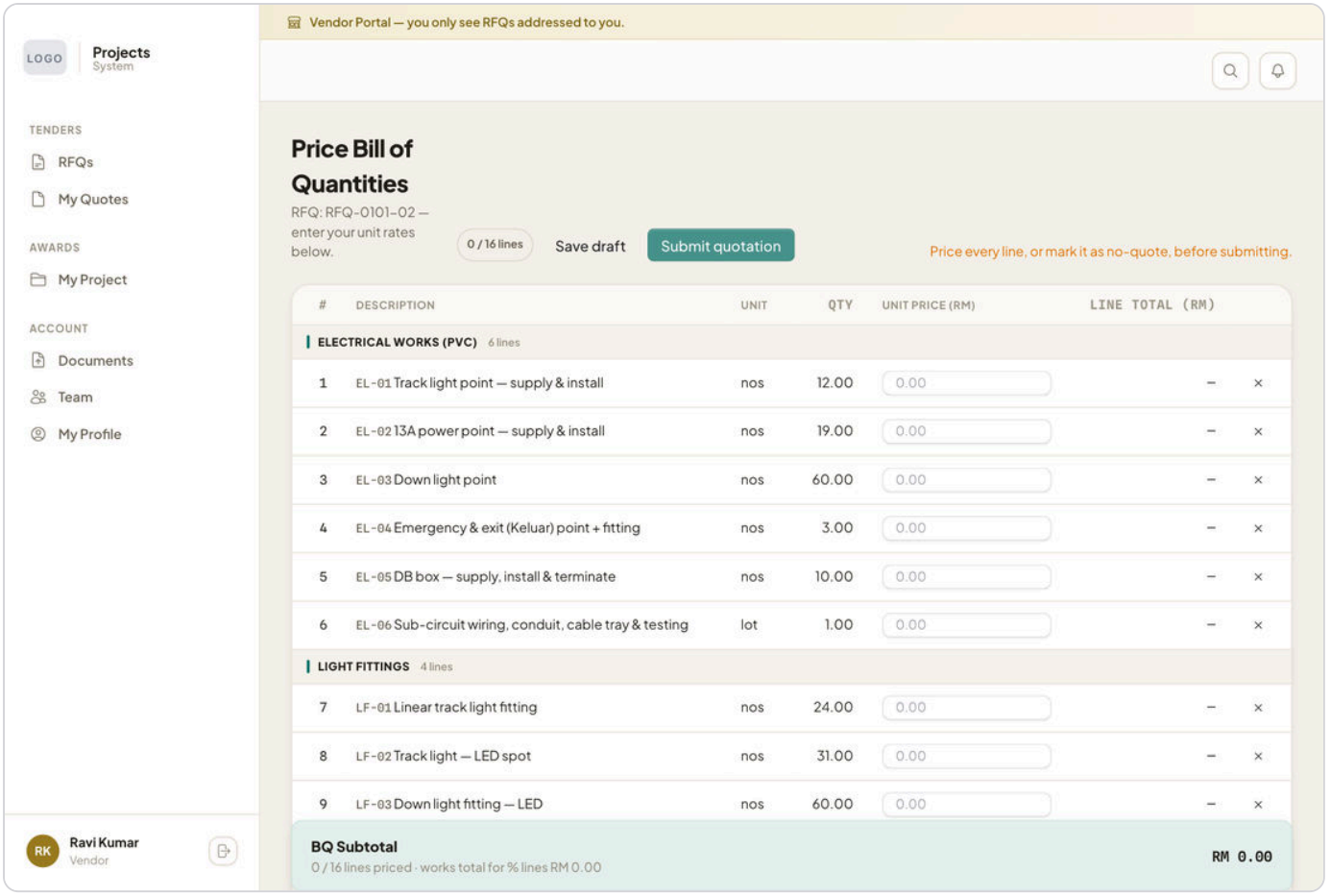


Price a request

1. Open **RFQs**. Each request shows the project, the deadline and how many days are left.
2. Press **Price Now**.



3. Type your **UNIT PRICE (RM)** for each line. The line total and the subtotal at the bottom update as you type.
4. If you do not want to price a line, mark it as no-quote with the **×** at the end of the line, so the company knows you left it out on purpose.
5. Press **Save draft** to finish later, or **Submit quotation** when every line is priced or marked.

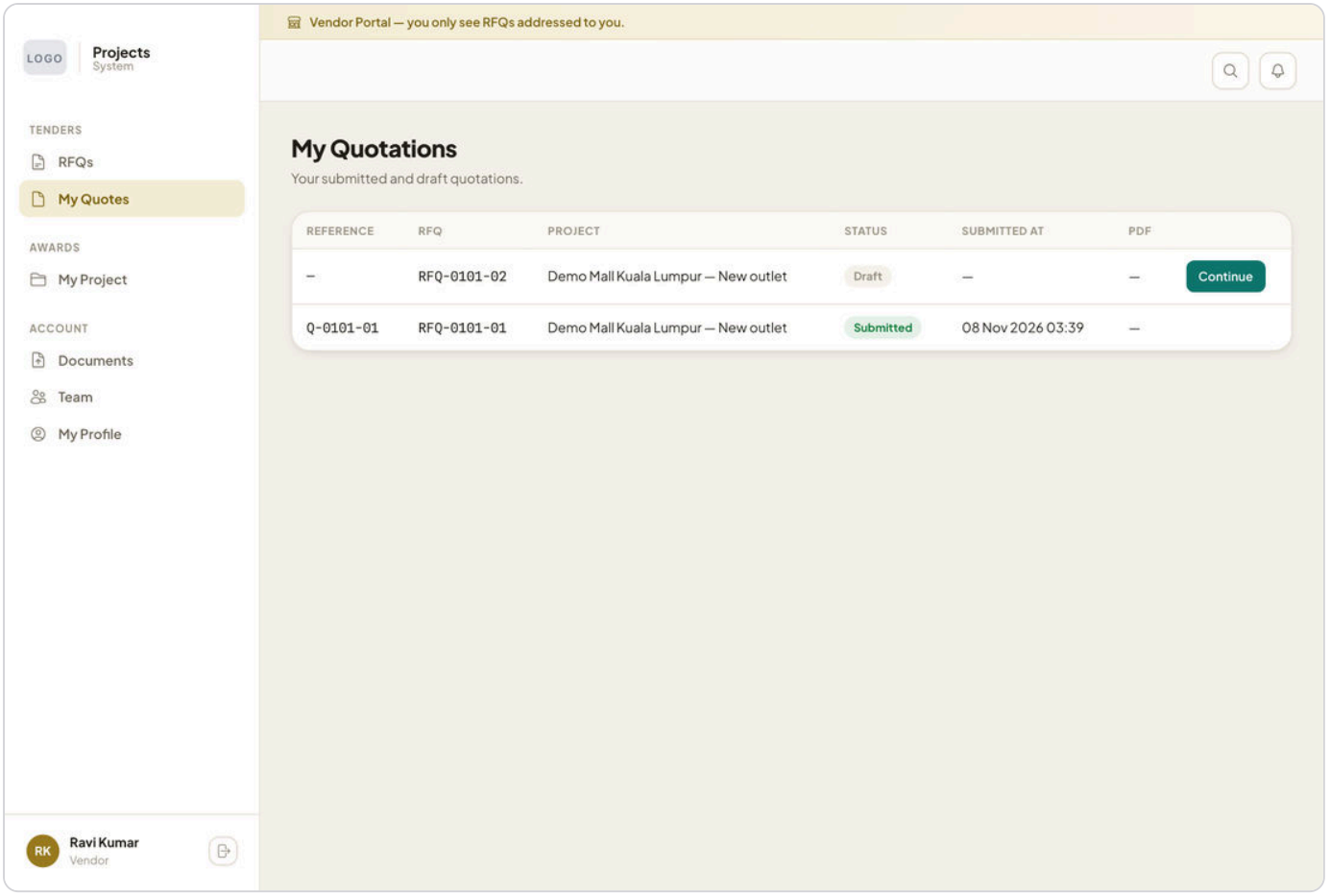


Some lines are a percentage, shown with a badge such as "8% of total amt or maximum 15k". Type the percentage you charge (for example 8). The amount is worked out from your other prices and stops at the maximum.

Submit before the deadline. A late quote may not be considered.

Your quotes

My Quotes lists your quotes with their status. A draft has **Continue** to carry on pricing.

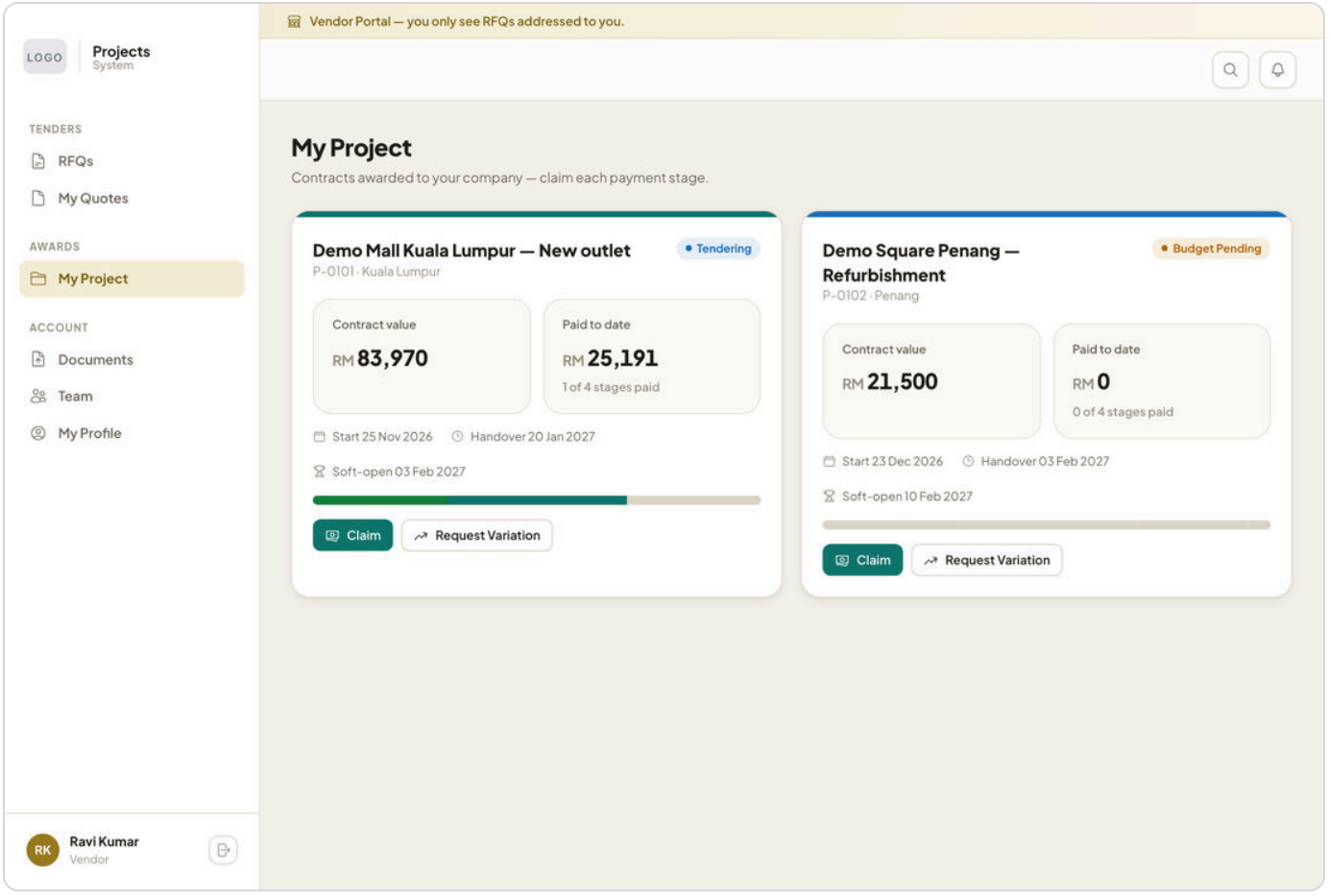

LOGO
Projects
System
TENDERS
RFQs
My Quotes
AWARDS
My Project
ACCOUNT
Documents
Team
My Profile
RK
Ravi Kumar
Vendor
Vendor Portal — you only see RFQs addressed to you.
My Quotations
Your submitted and draft quotations.
REFERENCE
RFQ
PROJECT
STATUS
SUBMITTED AT
PDF
–
RFQ-0101-02
Demo Mall Kuala Lumpur — New outlet
Draft
–
–
Continue
Q-0101-01
RFQ-0101-01
Demo Mall Kuala Lumpur — New outlet
Submitted
08 Nov 2026 03:39
–

Claim a payment

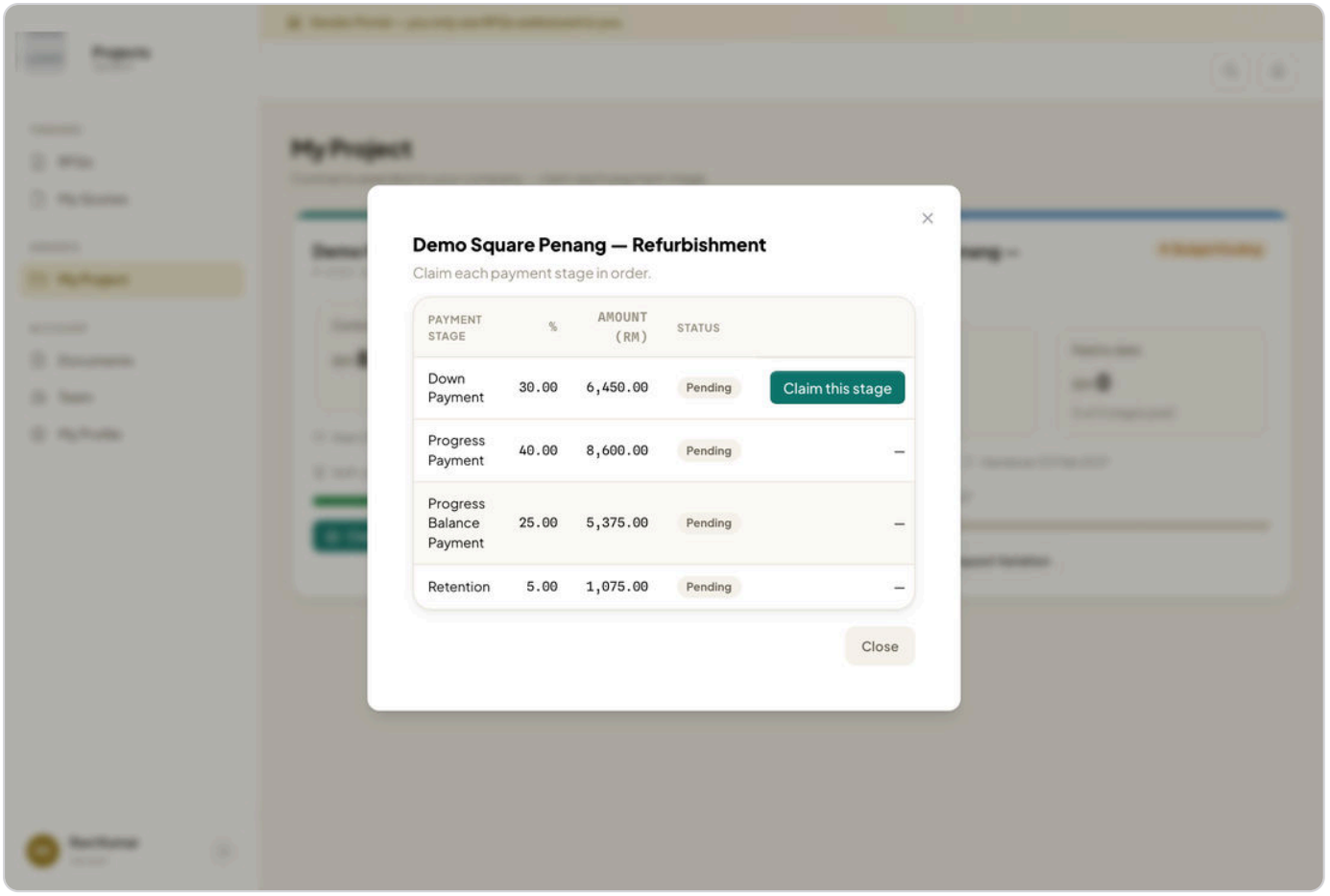
For: Vendors

When you win a contract, you are paid in stages, for example a down payment, progress payments, the balance and the retention (a part held back until some months after the outlet opens).

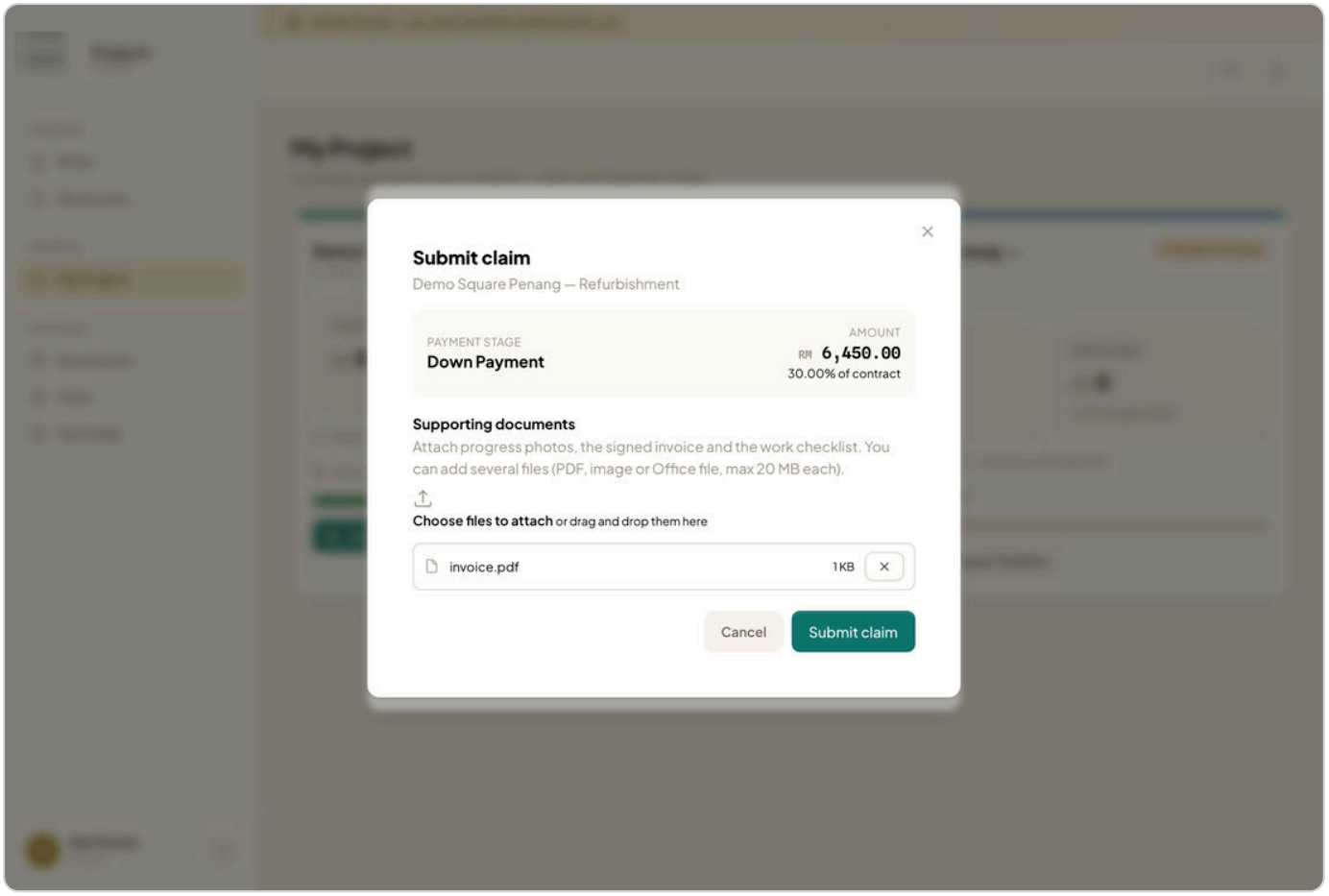
1. Open **My Project**. Each contract shows its **Contract value**, **Paid to date** and how many stages are paid.



2. Press **Claim** on the contract. The list shows every stage with its share of the contract, the amount and the status: **Pending**, **Awaiting approval** or **Paid**.
3. Press **Claim this stage**. Only the next stage you are owed has this button: stages are claimed in order.



4. Under **Supporting documents**, press **Choose files to attach** or drag the files onto it. Attach progress photos, the signed invoice and the work checklist. PDF, picture, Word and Excel files of up to 20 MB each are accepted.
5. Each file appears with its size. Press **×** to remove one added by mistake.
6. Press **Submit claim**. At least one file is needed.



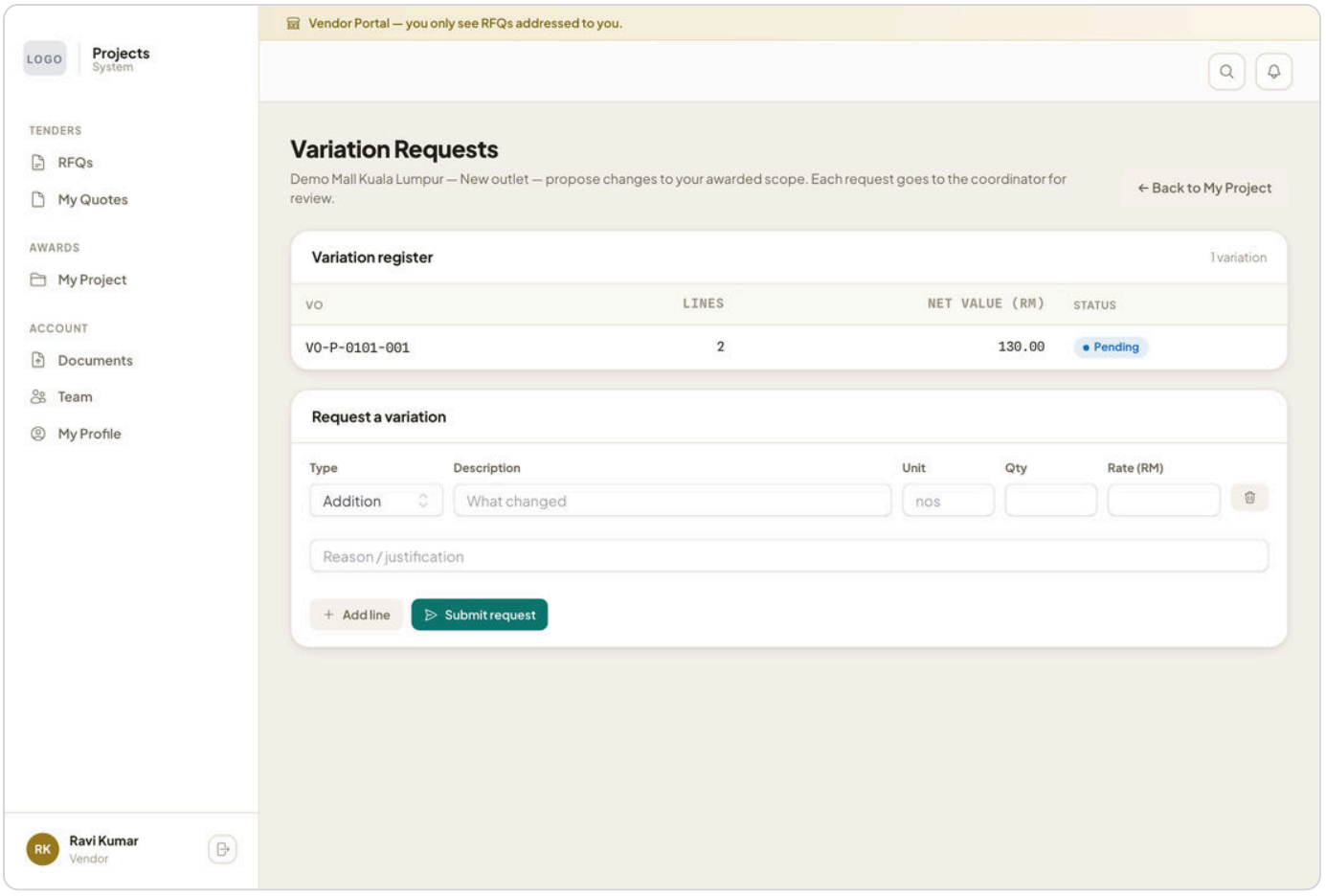
The stage then shows **Awaiting approval** while the company checks the work. Once it is approved and paid, it shows **Paid**, the paid-to-date figure goes up, and the next stage can be claimed.

Ask for a change to the work

For: Vendors

If the work changes after you won the contract, ask for a variation instead of claiming it as extra.

1. Open **My Project** and press **Request Variation** on the contract.
2. Under **Request a variation**, pick the **Type**: **Addition**, **Omission**, **Rate Change** or **New Item**.
3. Fill in the **Description**, **Unit**, **Qty**, **Rate (RM)** and the reason.
4. Press **Add line** for each further change.
5. Press **Submit request**.



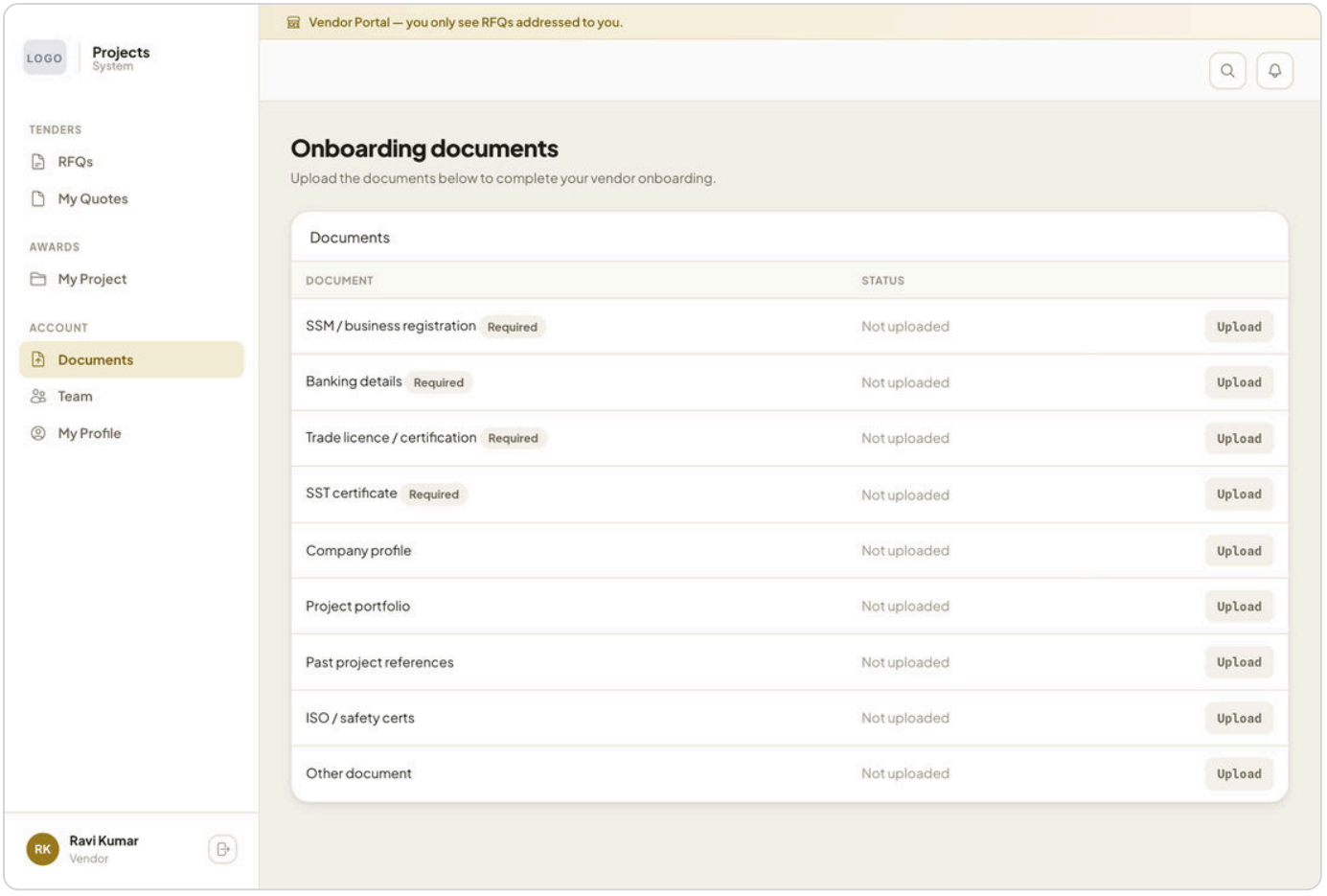
The request goes to the project coordinator. The **Variation register** at the top shows each request and its status.

Keep your company details up to date

For: Vendors

Documents

Open **Documents** to upload the papers the company needs before it can work with you. Items marked **Required** must be uploaded: business registration, banking details, trade licence and SST certificate. Press **Upload** on a row to add the file.

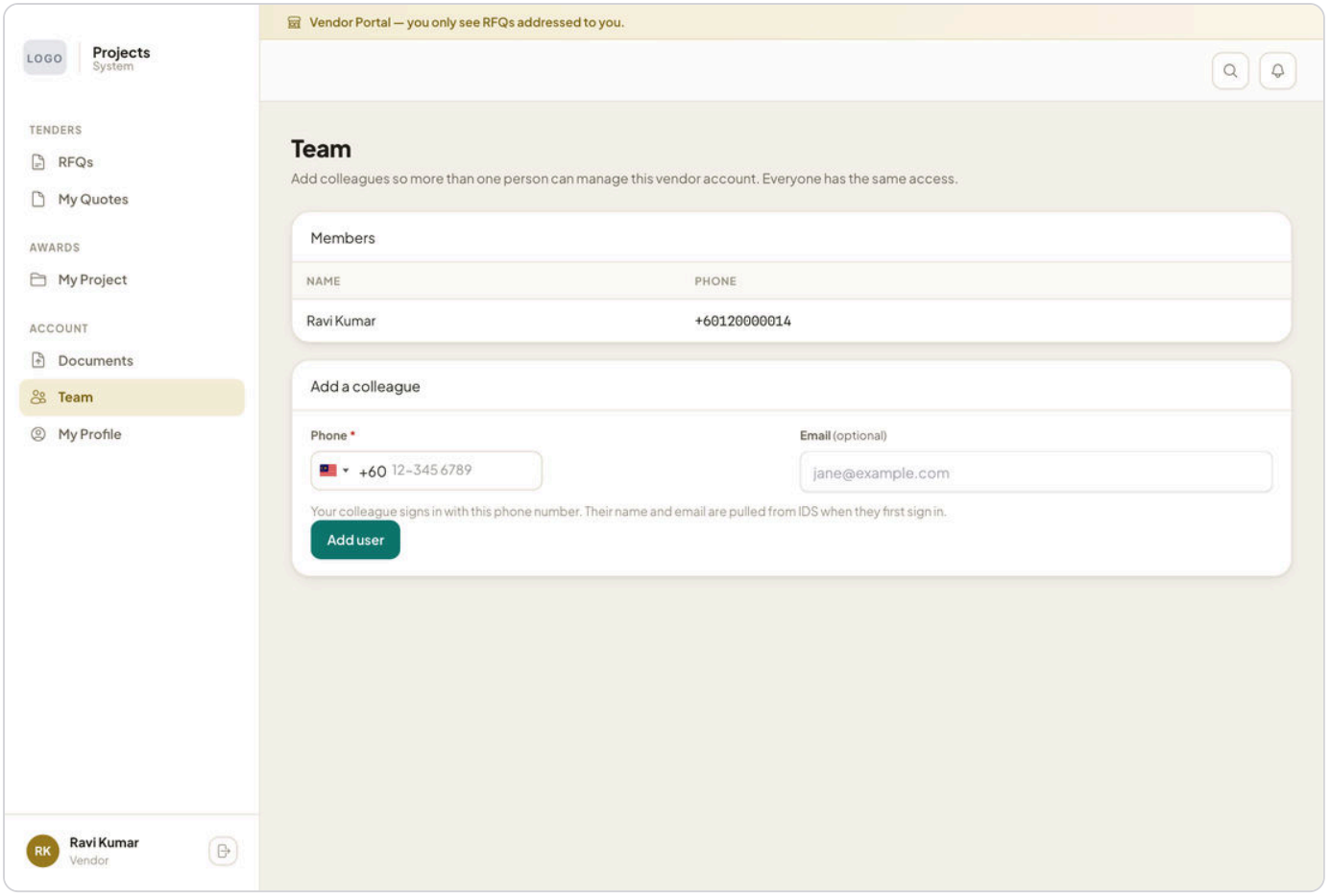


Team

More than one person can use your company's account, and everyone has the same access.

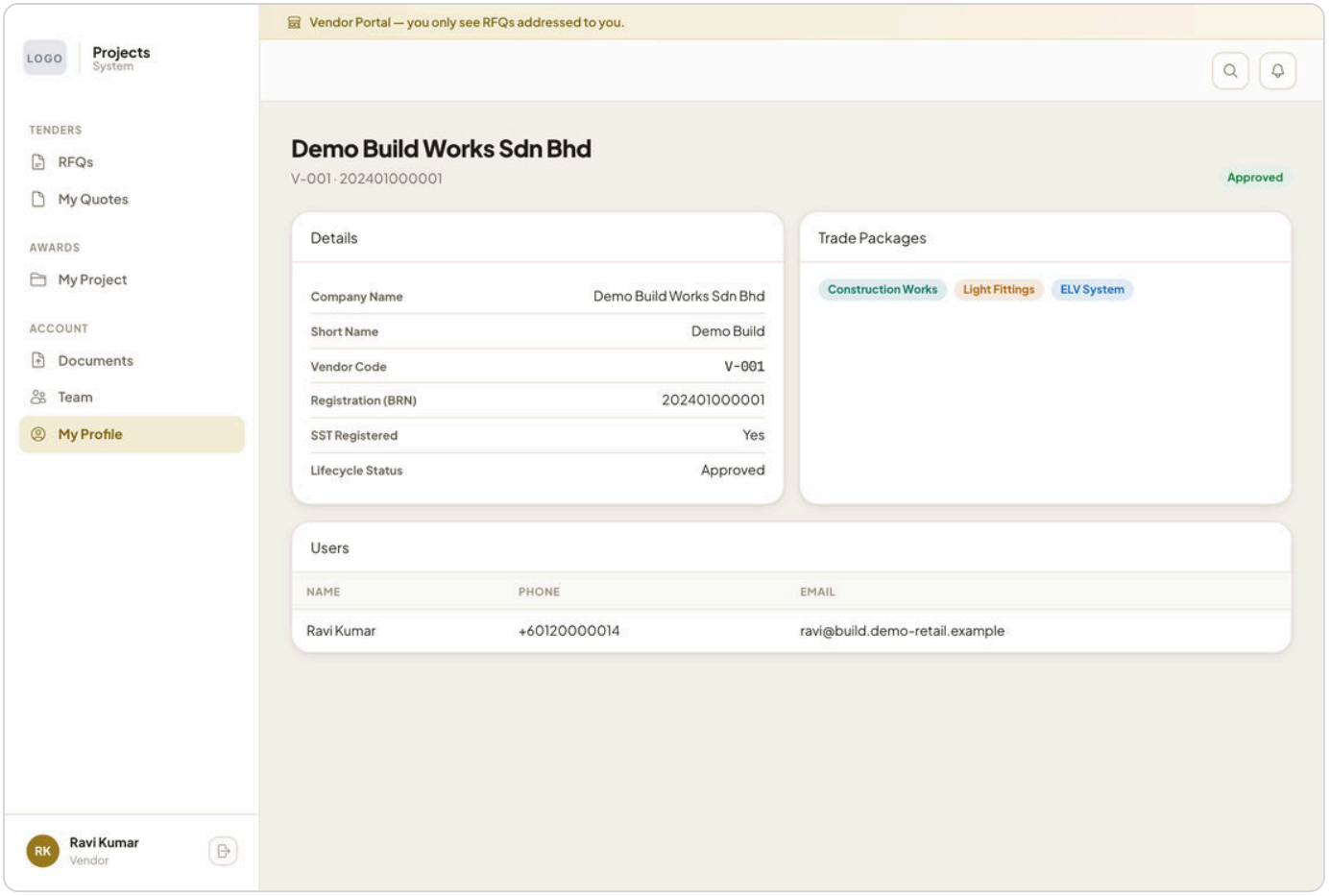
1. Open **Team**.
2. Under **Add a colleague**, type their **Phone** number. Add an **Email** if you like.
3. Press **Add user**.

Your colleague signs in with that phone number. Their name is filled in the first time they sign in. Only add people you trust to send quotes and claims for your company.



My Profile

My Profile shows what the company holds about you: company name, vendor code, registration number, SST registration, status, the **Trade Packages** (kinds of work) you are registered for, and your users. The trade packages decide which requests you can be invited to. If anything is wrong, contact the company; you cannot edit these details yourself.


Vendor Portal — you only see RFQs addressed to you.
LOGO
Projects
System
TENDERS
RFQs
My Quotes
AWARDS
My Project
ACCOUNT
Documents
Team
My Profile
RK
Ravi Kumar
Vendor
Demo Build Works Sdn Bhd
V-001 · 202401000001
Approved
Details
Company Name
Demo Build Works Sdn Bhd
Short Name
Demo Build
Vendor Code
V-001
Registration (BRN)
202401000001
SST Registered
Yes
Lifecycle Status
Approved
Trade Packages
Construction Works
Light Fittings
ELV System
Users
NAME
PHONE
EMAIL
Ravi Kumar
+60120000014
ravi@build.demo-retail.example

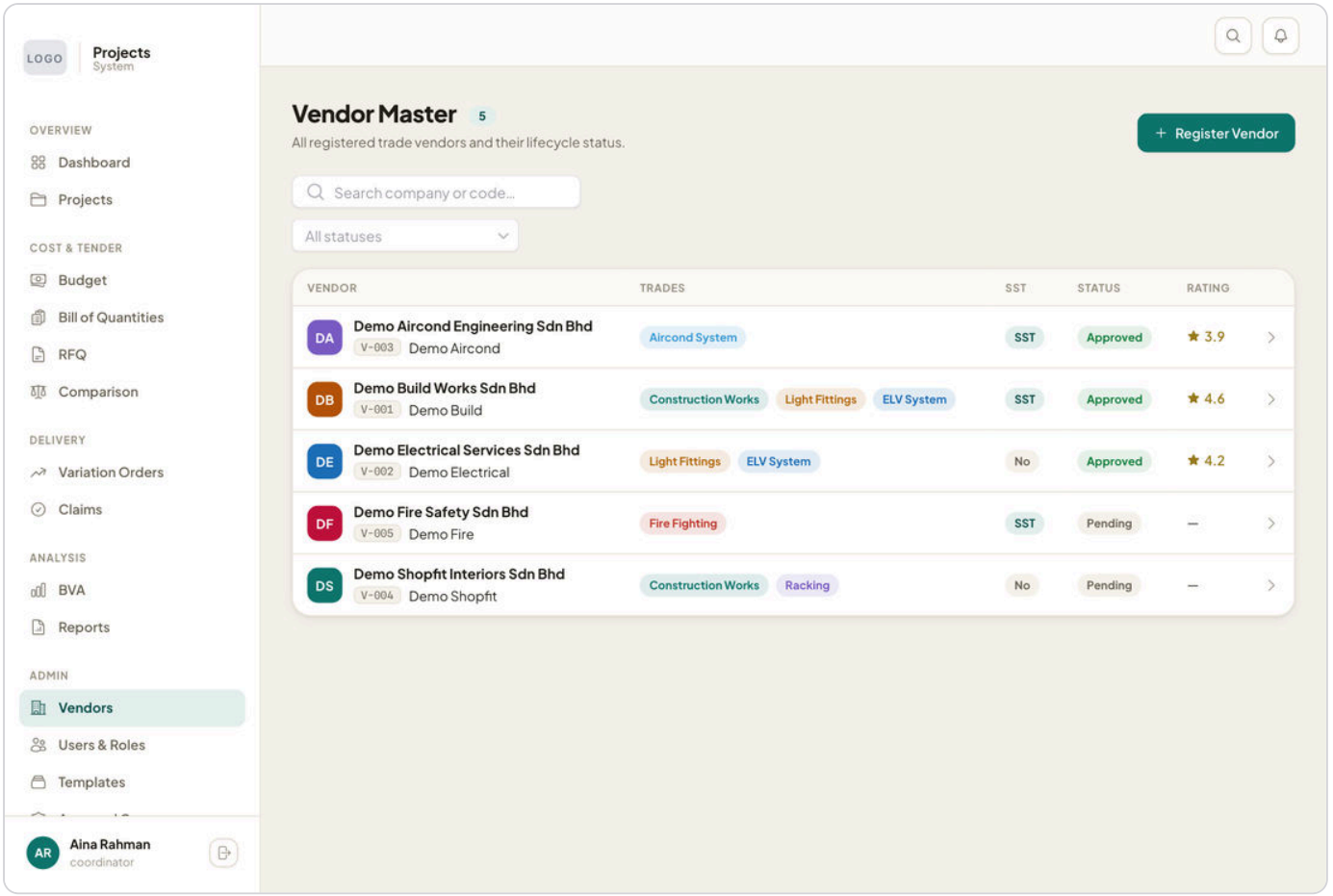
PROJECT MANAGEMENT

Register and approve vendors

For: Administrators

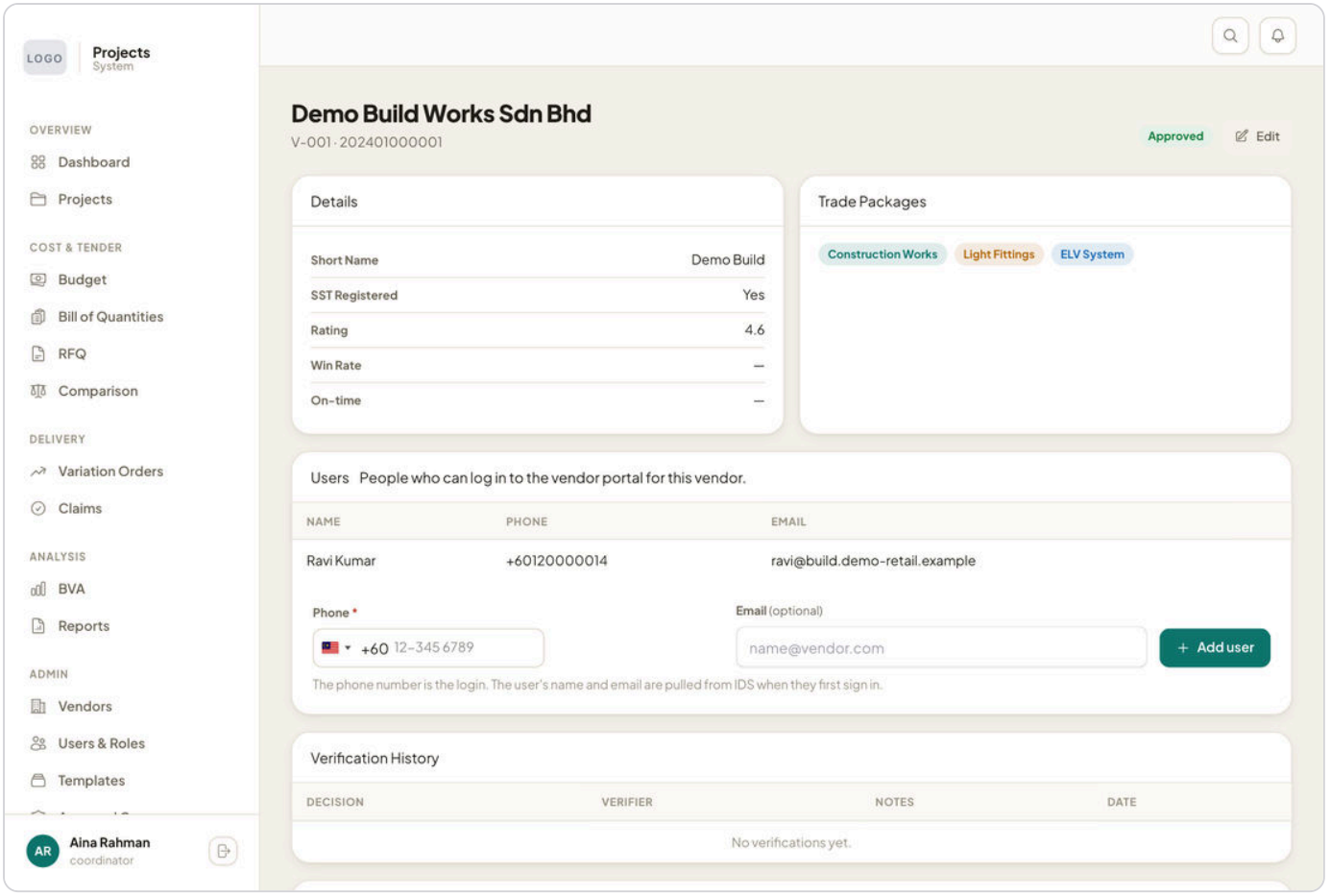
Vendors lists every vendor with the kinds of work they do, whether they are SST-registered, their status and their rating. Only vendors with the status **Approved** can be invited to quote.

1. Press **Register Vendor** to add a new one.
2. Press a vendor's row to open it.



On a vendor's page:

- **Users** lists who can sign in for that vendor. Type a **Phone** number and press **Add user** to add one.
- **Documents** shows the papers the vendor has uploaded.
- At the bottom, review the documents, then press **Approve & activate**, **Request more info** or **Reject registration**.
- **Edit** at the top right changes the vendor's details.


LOGO
Projects
System
OVERVIEW
Dashboard
Projects
COST & TENDER
Budget
Bill of Quantities
RFQ
Comparison
DELIVERY
Variation Orders
Claims
ANALYSIS
BVA
Reports
ADMIN
Vendors
Users & Roles
Templates
AR
Aina Rahman
coordinator
Demo Build Works Sdn Bhd
V-001 · 202401000001
Approved
Edit
Details
Short Name
Demo Build
SST Registered
Yes
Rating
4.6
Win Rate
—
On-time
—
Trade Packages
Construction Works
Light Fittings
ELV System
Users People who can log in to the vendor portal for this vendor.
NAME
PHONE
EMAIL
Ravi Kumar
+60120000014
ravi@build.demo-retail.example
Phone *
+60 12-345 6789
Email (optional)
name@vendor.com
+ Add user
The phone number is the login. The user's name and email are pulled from IDS when they first sign in.
Verification History
DECISION
VERIFIER
NOTES
DATE
No verifications yet.

PROJECT MANAGEMENT

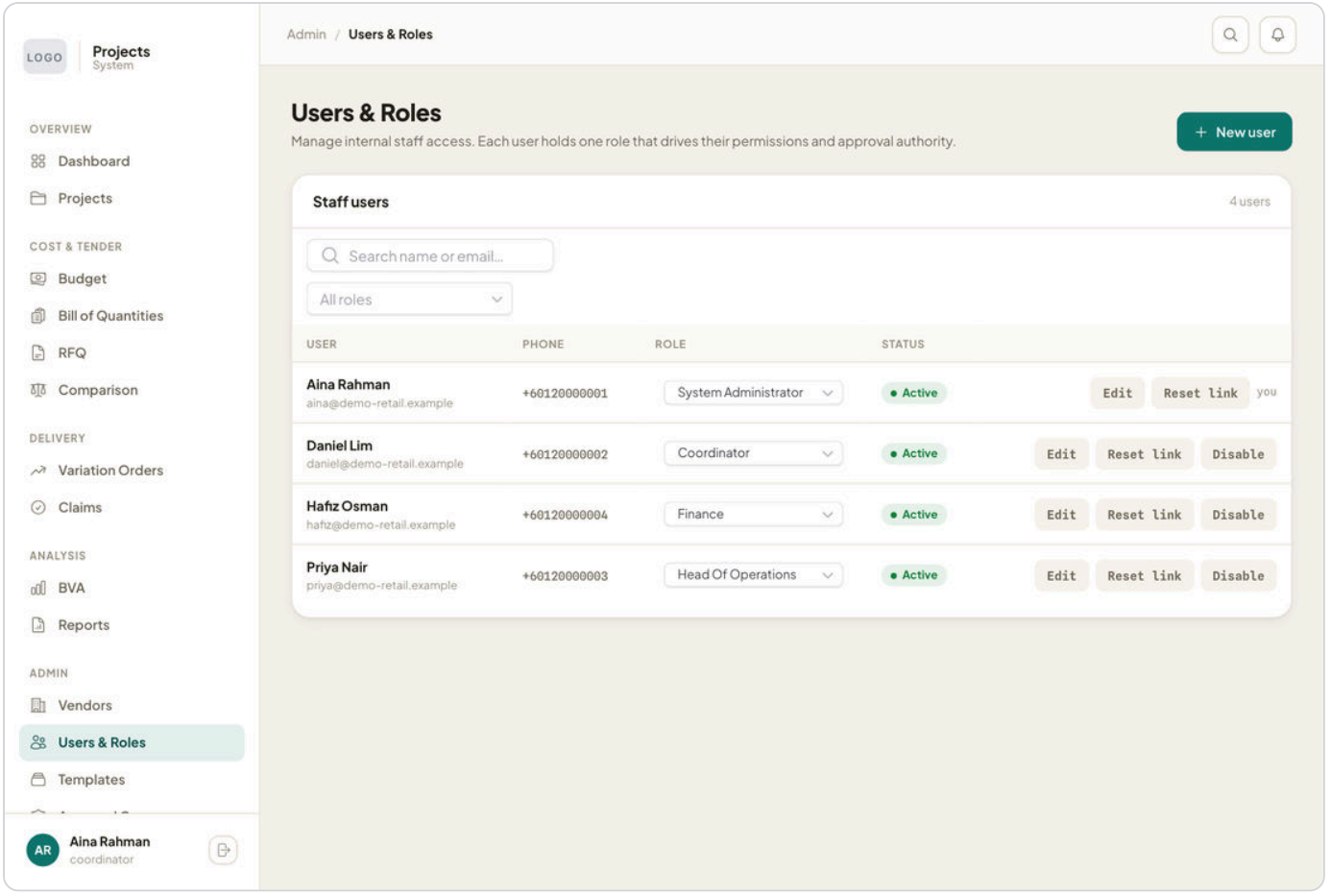
Add staff

For: Administrators

Staff accounts are added by an administrator. Each person holds one role, and the role decides both what they can open and where they can approve.

1. Open **Users & Roles** and press **New user**.
2. Type the person's **Phone** and pick the **Role**.
3. Press **Create user**.

Staff sign in with their phone number. Their name and email are filled in from the company sign-in the first time they sign in.



On each row:

- Change the **Role** straight from the list.
- **Edit** changes the person's details.
- **Reset link** sends a new sign-in link.
- **Disable** stops the person signing in. Your own row says **you** instead; you cannot disable yourself.

Every change made in the module is recorded on the **Audit Log** page: who did it, when, and the values before and after. It is not in the menu; open it by adding `/audit` to the module's web address.

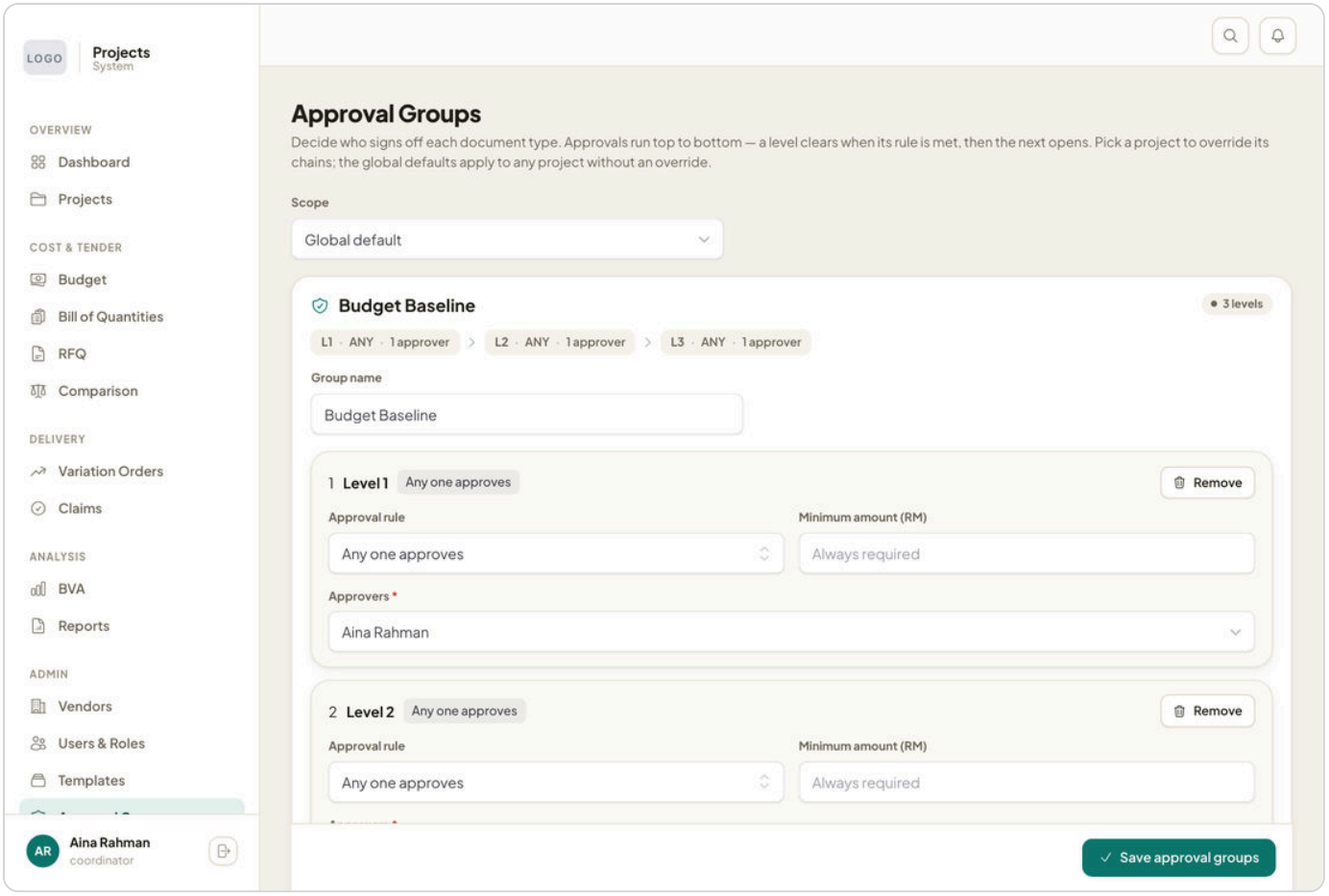
Set who approves each document

For: Administrators

Approval Groups decides who signs off each kind of document: budget, award, variation order, progress claim, final claim, milestone certification, retention release and vendor verification.

1. Keep **Scope** on **Global default** to change the chain used by every project, or pick a project to give it its own chain.
2. For each document, each **Level** has:
    - **Approval rule**: **Any one approves** or **All must approve**.
    - **Minimum amount (RM)**: leave it on **Always required**, or type an amount so the level only applies to documents of that value or more.
    - **Approvers**: the people who can approve at that level.
3. Use **Add level** and **Remove** to change the chain.
4. Press **Save approval groups**.

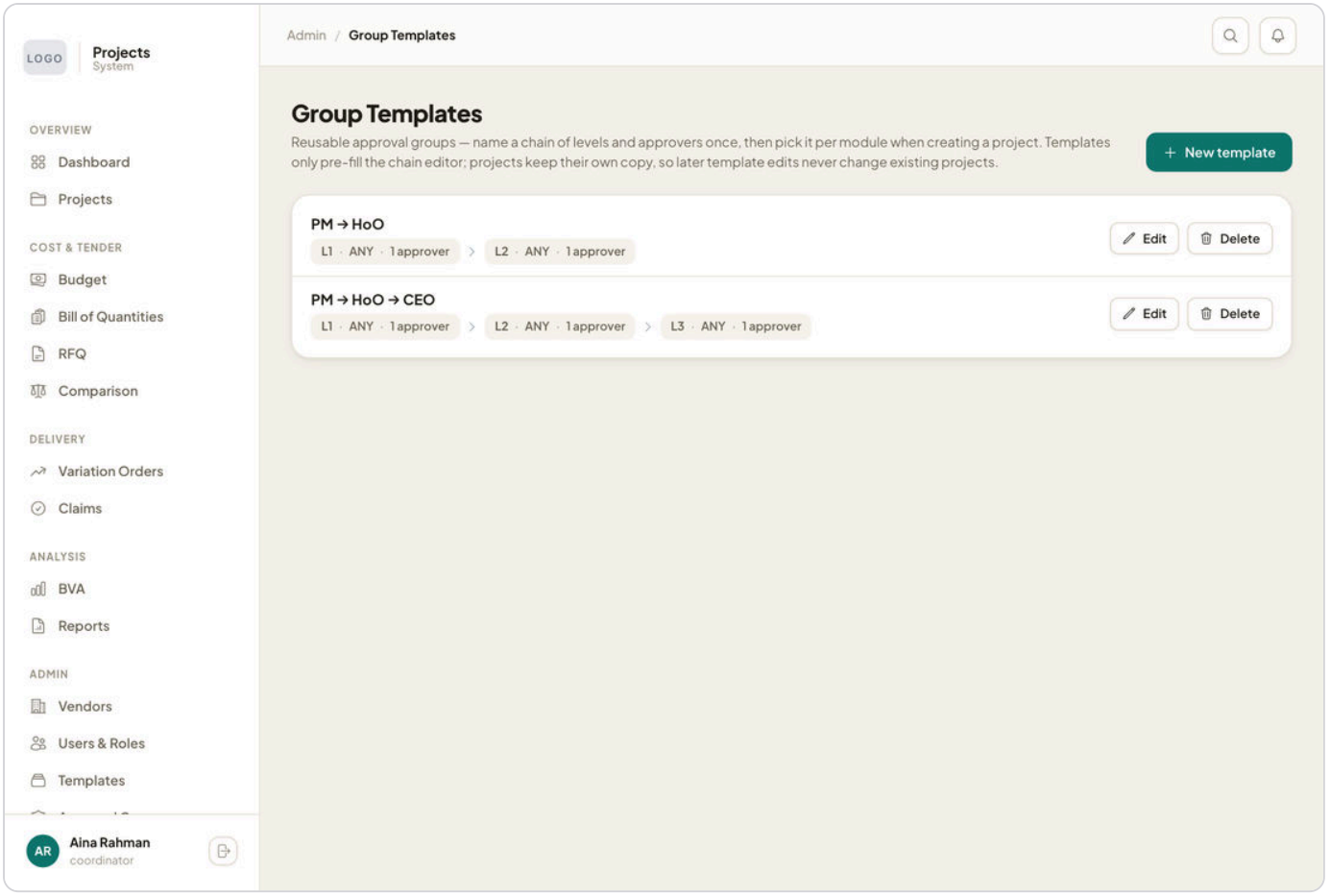
Levels run from top to bottom. A level clears when its rule is met, then the next one opens.



Group templates

Group Templates keeps named chains to reuse, such as "PM → HoO → CEO". They are what **Use group** offers when someone creates a project. Press **New template** to add one, or **Edit** and **Delete**.

A project keeps its own copy of the chain, so changing or deleting a template later never changes an existing project.


LOGO
Projects
System
OVERVIEW
Dashboard
Projects
COST & TENDER
Budget
Bill of Quantities
RFQ
Comparison
DELIVERY
Variation Orders
Claims
ANALYSIS
BVA
Reports
ADMIN
Vendors
Users & Roles
Templates
AR
Aina Rahman
coordinator
Admin / Group Templates
Group Templates
Reusable approval groups — name a chain of levels and approvers once, then pick it per module when creating a project. Templates only pre-fill the chain editor; projects keep their own copy, so later template edits never change existing projects.
+ New template
PM → HoO
L1 · ANY · 1 approver
L2 · ANY · 1 approver
Edit
Delete
PM → HoO → CEO
L1 · ANY · 1 approver
L2 · ANY · 1 approver
L3 · ANY · 1 approver
Edit
Delete

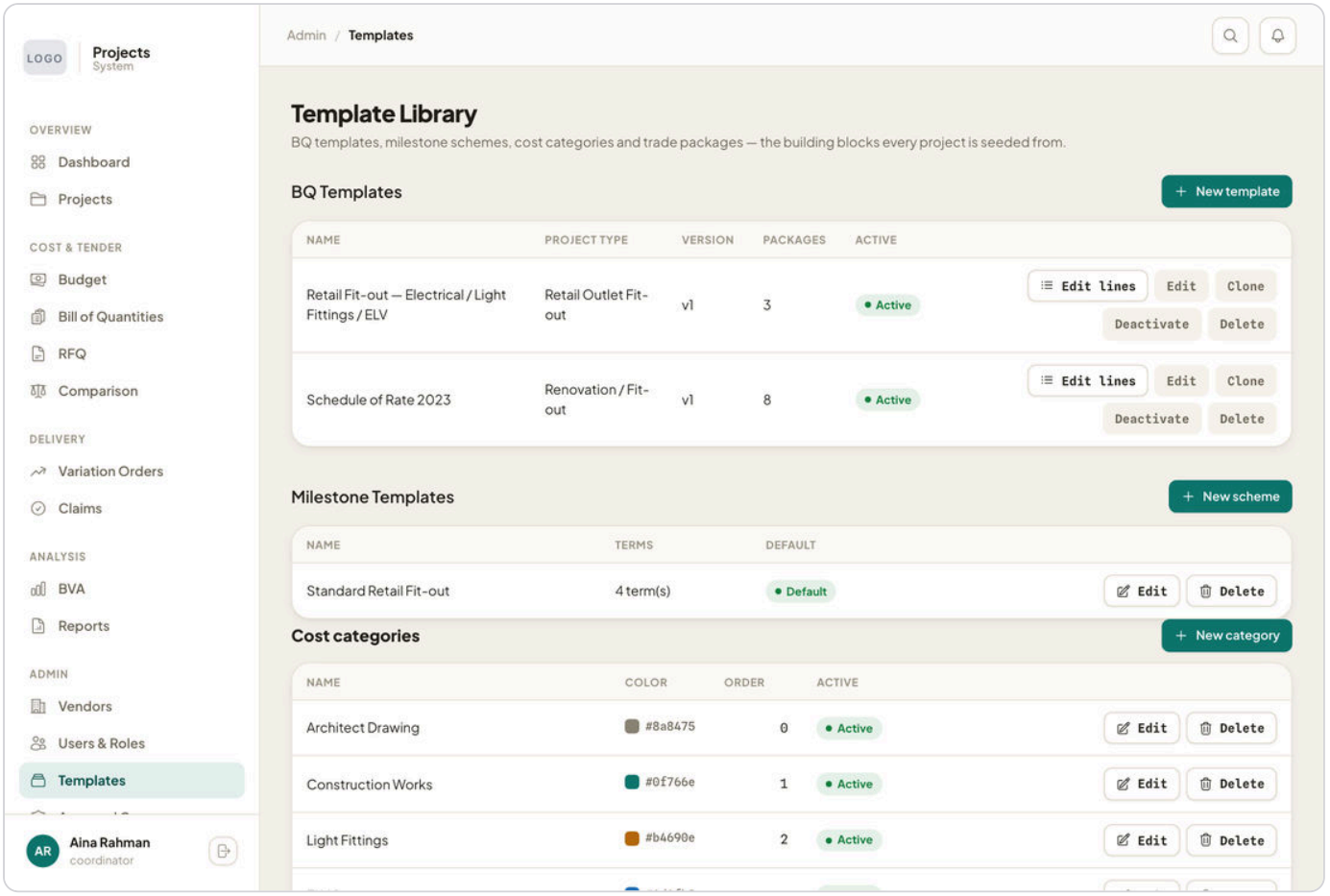
PROJECT MANAGEMENT

Keep the rate templates

For: Administrators

New budgets start from a rate template, so coordinators begin from your company's agreed rates instead of a blank sheet. Open **Templates** to see:

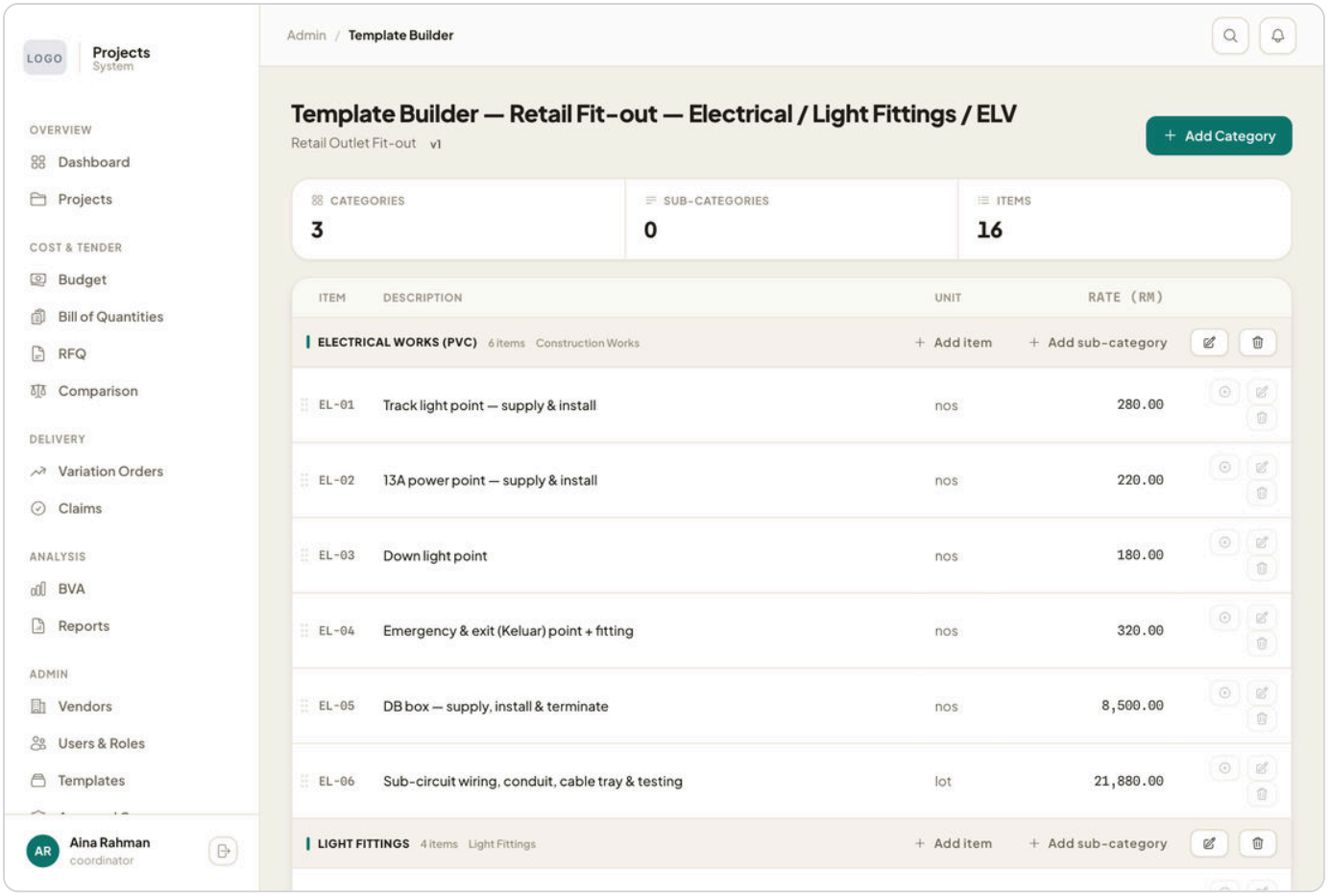
- **BQ Templates**: the rate templates. Press **Edit lines** to change the items, **Clone** to copy one, **Deactivate** to hide it from new budgets.
- **Milestone Templates**: the payment stages offered as **Payment Terms** when creating a project.
- **Cost categories** and **Trade Packages**: the groups used in reports and to match vendors to work.



Change a rate template

1. Press **Edit lines** on the template.
2. Press **Add Category** for a new group, **Add item** for a new item in a group, or **Add sub-category** for a heading inside a group.
3. Use the pencil and bin buttons to change or remove an item.

An item's edit window has **Exclude from % base**: switch it on for items that should not count towards percentage items (for example goods your company supplies itself). Budgets made from the template then start with that item already excluded.



Changes affect new budgets only. Budgets already made keep the items they started with.

USER GUIDE · VERSION 1

Staff ideas (WITS)

Staff put forward ideas to improve their own work. Each idea is checked, scored, decided, carried out and confirmed, and the person who raised it is told at every step.

1. What it is for
2. Put forward an idea
3. Follow your idea
4. Answer a question about your idea
5. Carry out your approved idea
6. Screen new ideas
7. Score and decide on an idea
8. Confirm finished work
9. Read the reports
10. Give people access
11. Change the rules and the name

What it is for

For: Everyone

WITS (Work Improvement Team System) collects ideas from staff about their own work: a step that could be removed, a layout that costs walking, a form filled in twice. Every idea gets an answer, whether it is yes or no, and the answer comes with a reason.

An idea goes through six stages:

1. **You submit** it.
2. A **WITS Coordinator** screens it: is it an improvement idea, and is it in scope?
3. The **WIT Council** scores it against a fixed list of questions.
4. The Council decides: **Implement**, keep in view, or **Reject**.
5. The person who raised it carries it out.
6. Someone else confirms the change is in use, and the idea is closed.

Who uses it

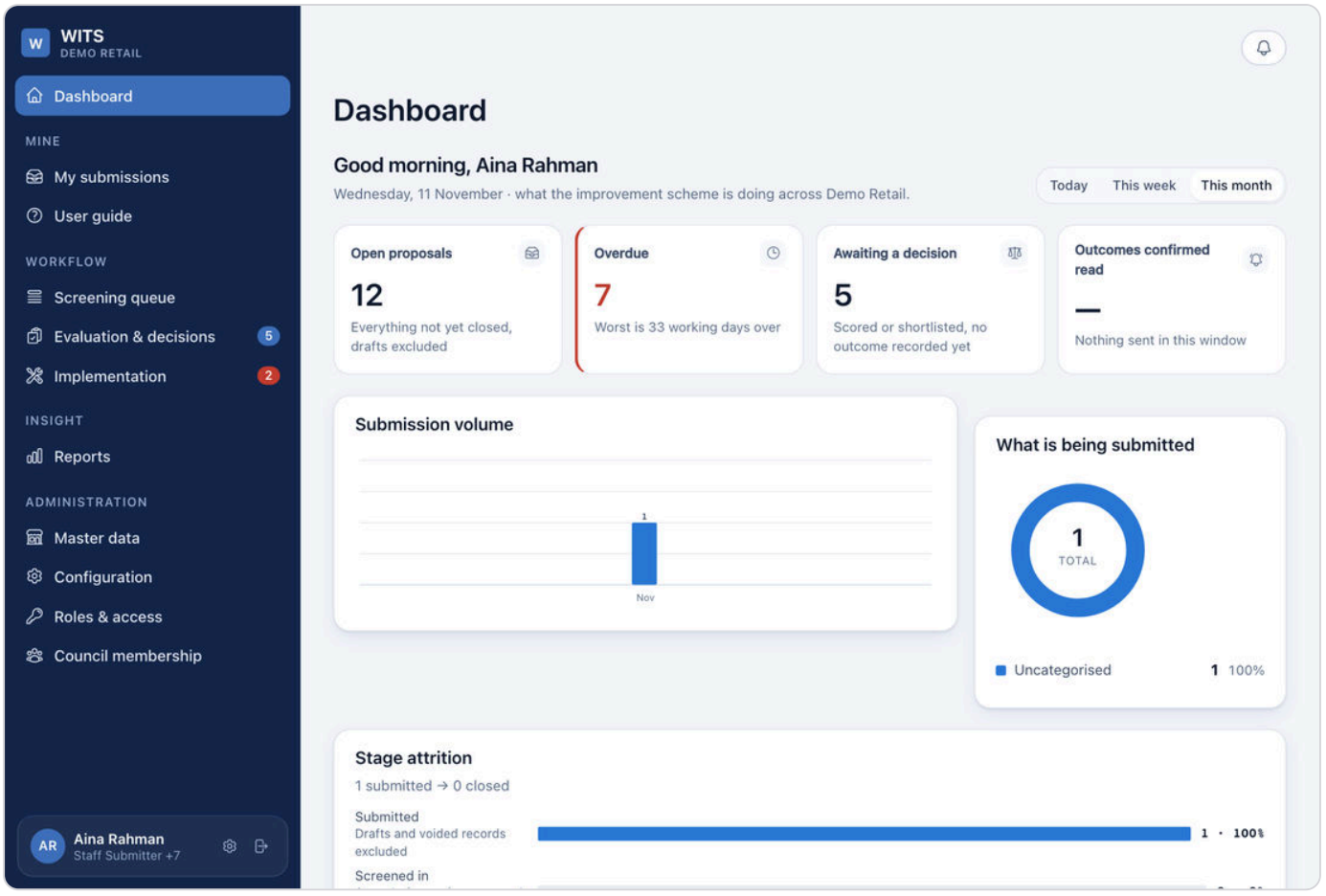
Role on screen	What they do
Staff Submitter	Everyone starts with this. Put forward ideas and follow your own.
WITS Coordinator	Screens new ideas from the outlets they look after, and confirms finished work.
WIT Council Member, **Council Convenor**, **Evaluator**	Score ideas and decide on them.
Implementation Owner	Records progress on approved ideas.
Outlet Manager	Sees the ideas from their outlet.
super_admin	Gives people roles and changes the settings.

What it needs from other modules

- You sign in with the same phone number and password you use for your other work apps. There is no separate WITS password.

- Your name, staff number, outlet and position come from your company's staff records. Nobody types them into WITS, and nobody can change them there. If something is wrong, ask HR to correct it.
- Which outlets a coordinator looks after also comes from the staff records, so it changes when HR moves them.

WITS is for improving how work is done. Equipment faults go to the Fault & Defect Reporting System, and customer complaints go to the Customer Service System. A coordinator will send those on rather than reject them.

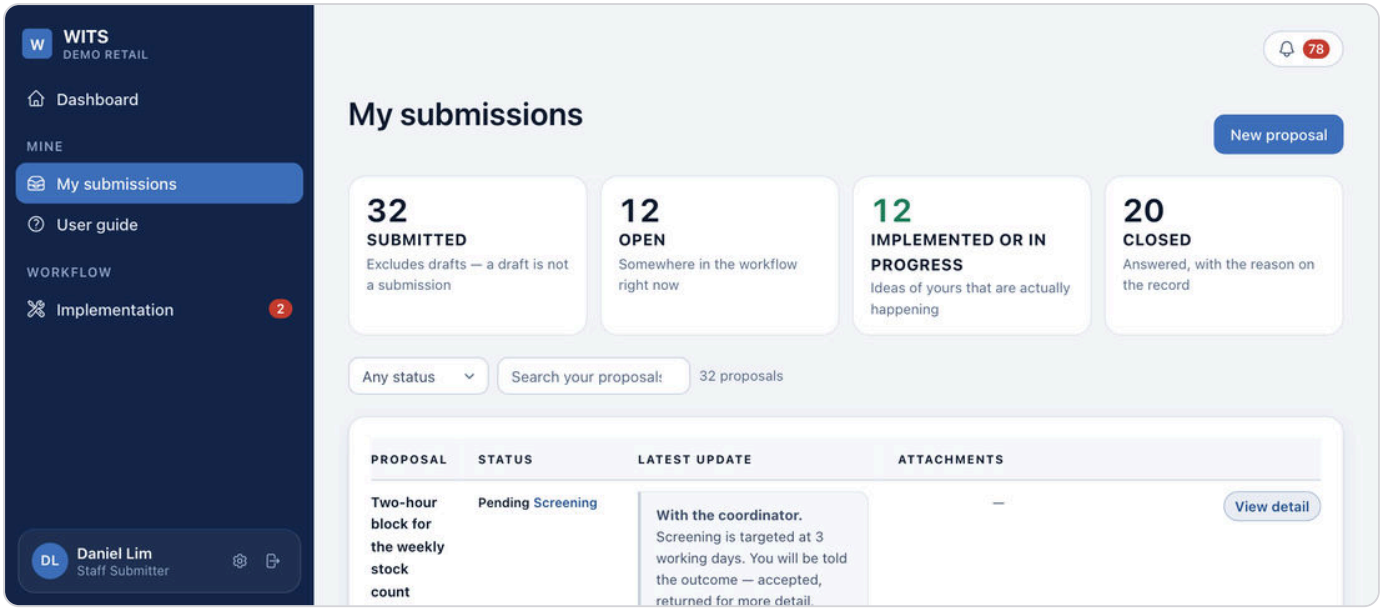


The **Dashboard** shows the same figures to everyone: how many ideas are open, how many are late, and how many are waiting for a decision. The menu on the left only shows the screens your role can open.

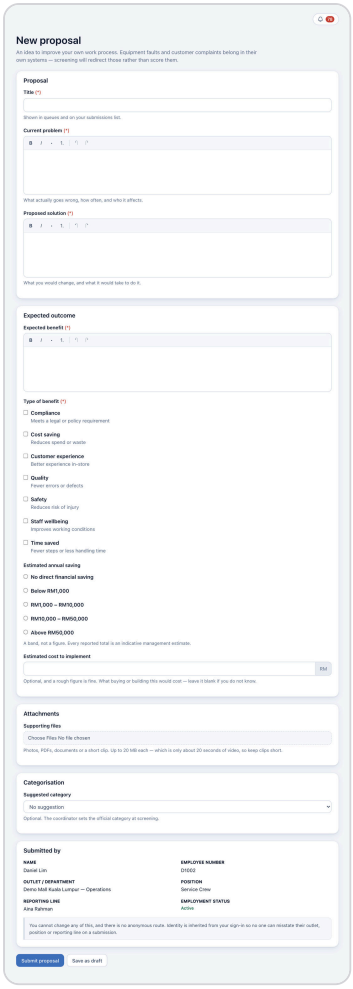
Put forward an idea

For: Staff

1. Open **My submissions** in the menu on the left.
2. Press **New proposal** at the top right. If you have an unfinished draft, the button says **Resume draft** instead.



3. Fill in the form:
    - **Title**: a few words that name the change. It is what people see in the lists.
    - **Current problem**: what goes wrong today, how often, and who it affects.
    - **Proposed solution**: the one change you suggest, written so that someone who does not do your job could carry it out.
    - **Expected benefit**: what gets better, and for whom.
    - **Type of benefit**: tick every one that applies, for example **Time saved** or **Safety**.
    - **Estimated annual saving**: pick a range, such as **Below RM1,000**. You do not type an exact amount.
    - **Estimated cost to implement**: optional. Leave it empty if you do not know.
    - **Supporting files**: photos, PDFs or a short video, up to 20 MB each.
    - **Suggested category**: optional. The coordinator sets the final category.
4. Press **Submit proposal**. To finish later, press **Save as draft**. Nobody else can see a draft.



Fields marked **(*)** are needed to submit, not to save a draft.

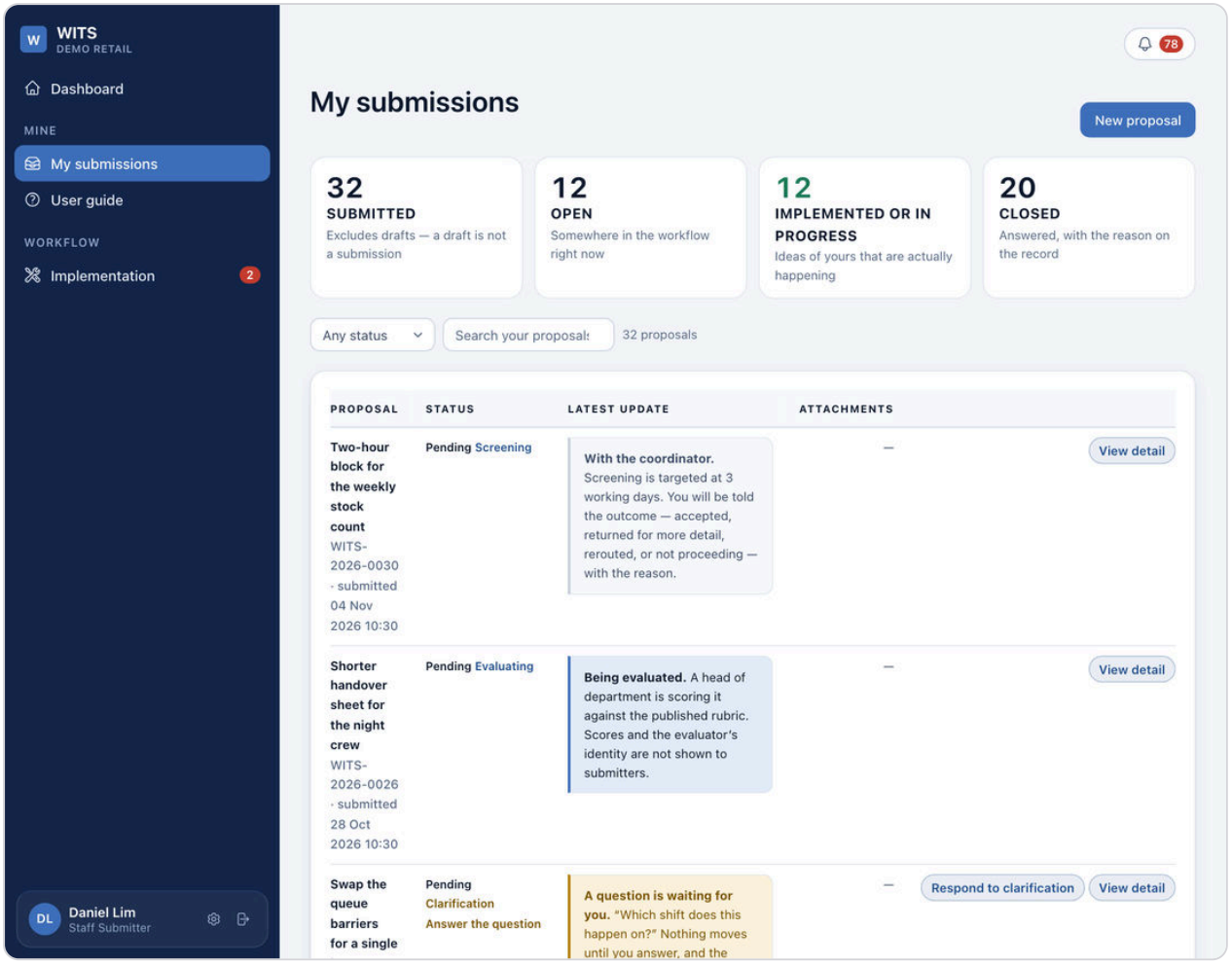
The Council reads your reasons, not only the saving range you picked. A large range does not get a higher score on its own.

Follow your idea

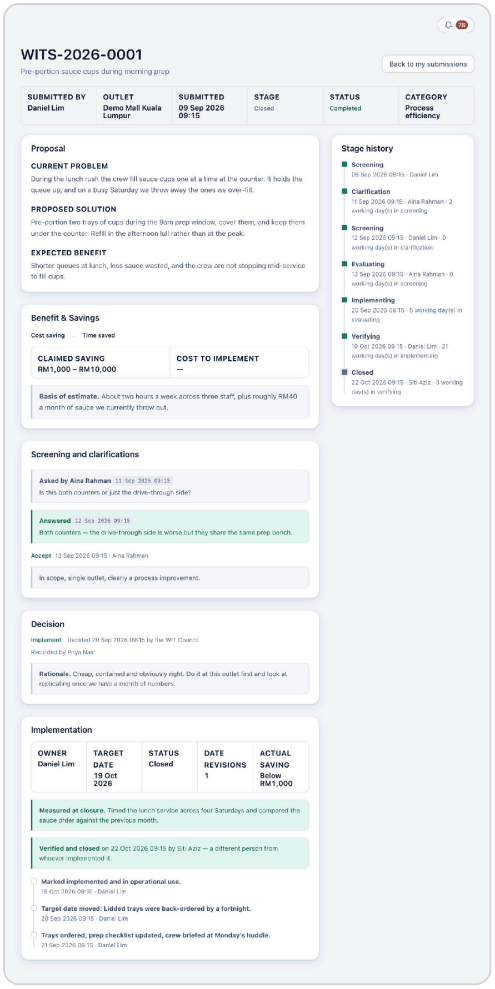
For: Staff

See where each idea is

Open **My submissions**. Each row shows the idea, its status and stage, and the latest update in words. Use **Any status** to show only one kind, or the search box to find one by name or reference.



Press **View detail** on a row to see the whole record: what you wrote, the coordinator's questions and answers, the decision with its reason, the work done, and who confirmed it.

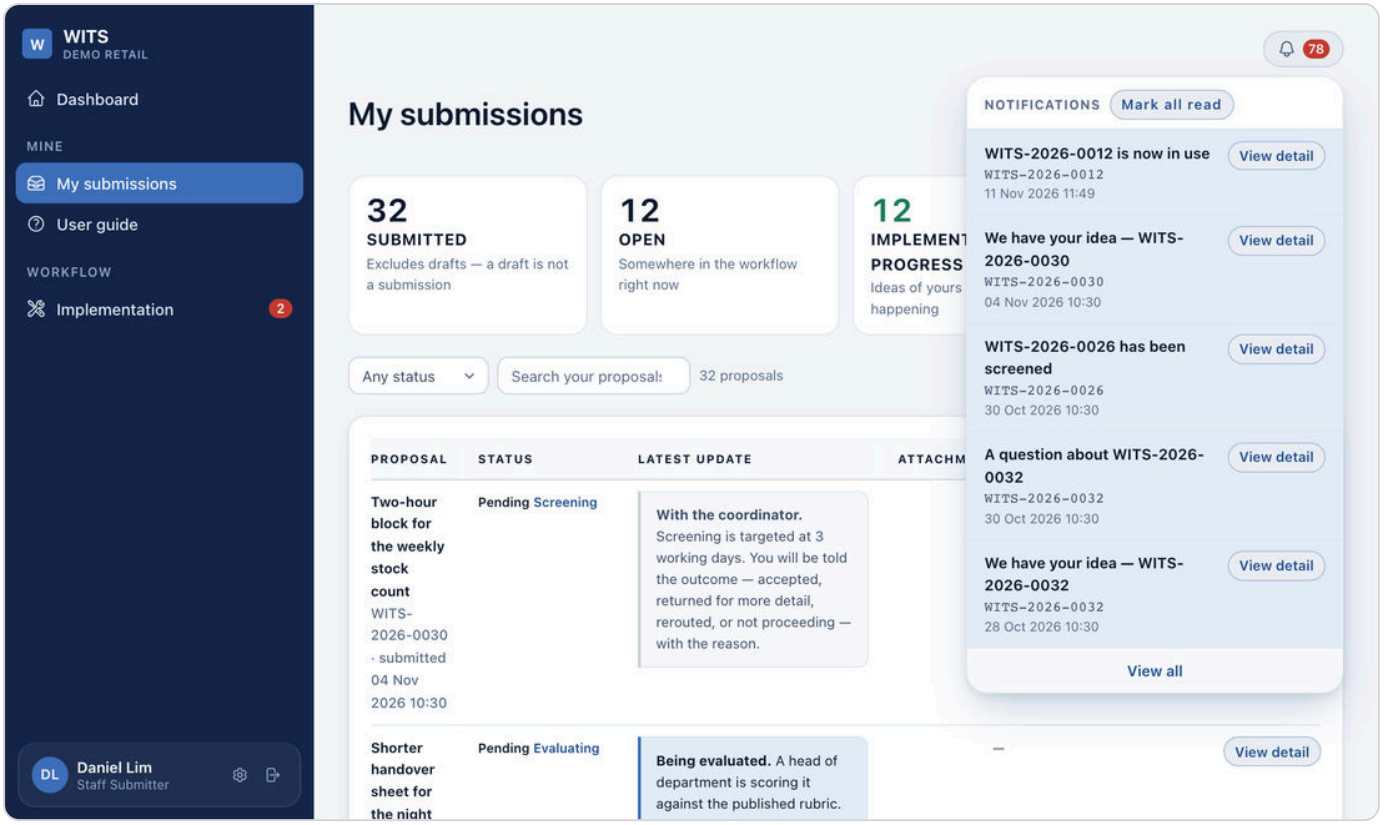


While the Council is scoring your idea, you see the stage **Evaluating** but not the marks or who is scoring. Once they decide, the reason is shown to you in full.

Notifications

Every change of stage reaches you in the bell at the top right of every page. The red number is how many you have not read.

1. Press the bell to see the latest ones.
2. Press **View detail** to open that idea, or **View all** to see the full list.
3. Press **Mark all read** to clear the number.



You cannot switch these notifications off. You may also get them by email, at the address in your staff record.

What the statuses mean

Status	Meaning
Pending	Somewhere in screening or scoring.
Approved	The Council said yes. Work has not started.
In progress	Being carried out.
Completed	Done, in use, and confirmed by someone else.
Kept in view	A good idea for later. It shows a date to look at it again.
Rejected	The Council scored it and said no.
Unqualified	Closed at screening, without a score.
Rerouted	Sent to the system that handles it, such as faults or customer complaints.
Duplicate	Someone raised the same idea earlier. Yours is linked to it and counts as support.

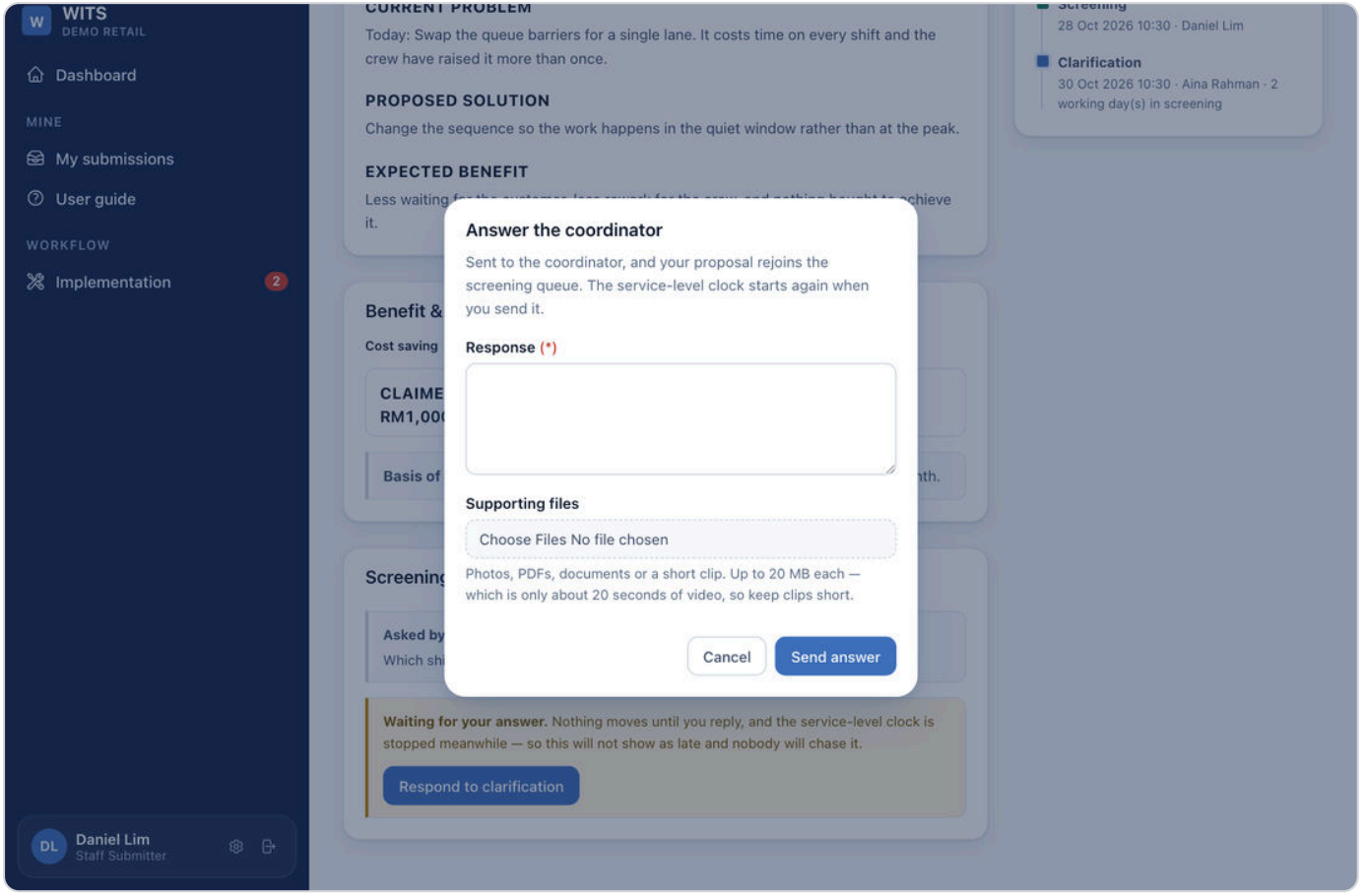
A rejected idea stays on the record. If things change, submit it again and say what changed.

Answer a question about your idea

For: Staff

A coordinator may need one more detail before they can judge your idea. When that happens, you get a notification, and the row in **My submissions** says **Answer the question**.

1. Open **My submissions** and find the row marked **Answer the question**.
2. Press **Respond to clarification**.
3. Type your answer in **Response**. Add photos or files under **Supporting files** if they help.
4. Press **Send answer**.



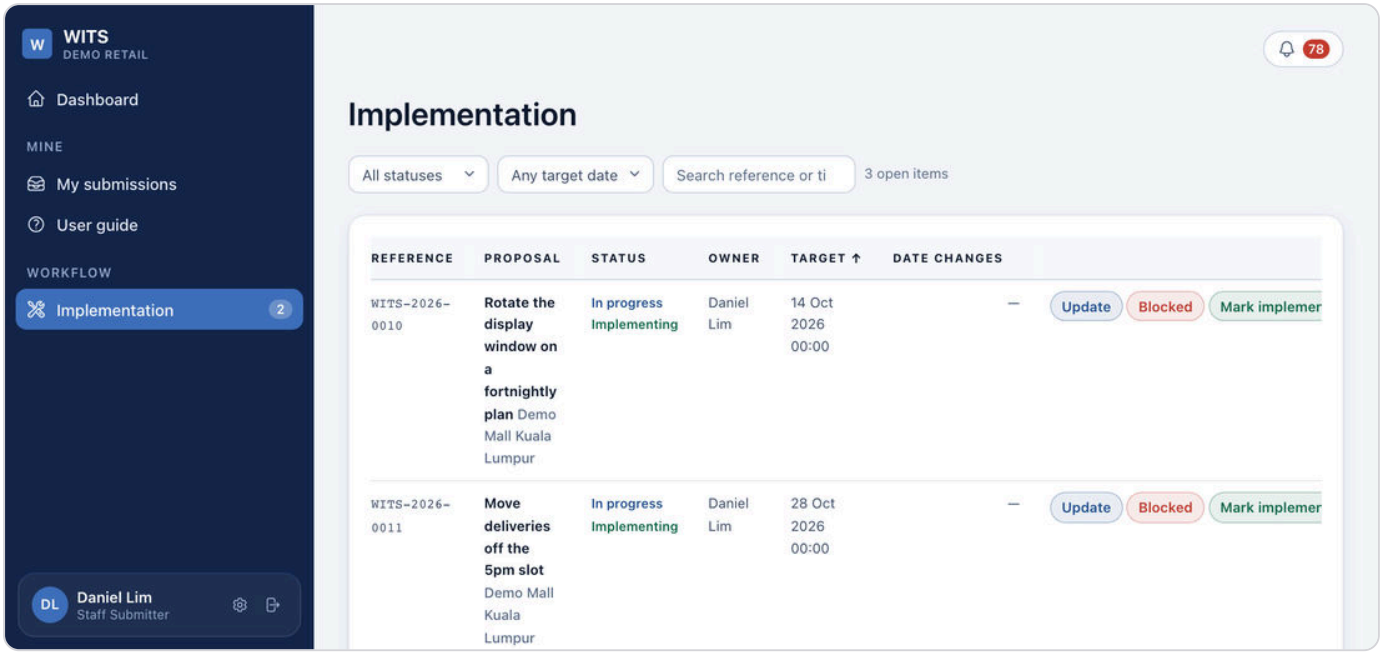
Your idea goes back to the coordinator. The time limit for screening stops while the question waits for you, so your idea is not counted as late, but nothing moves until you answer.

Carry out your approved idea

For: Staff

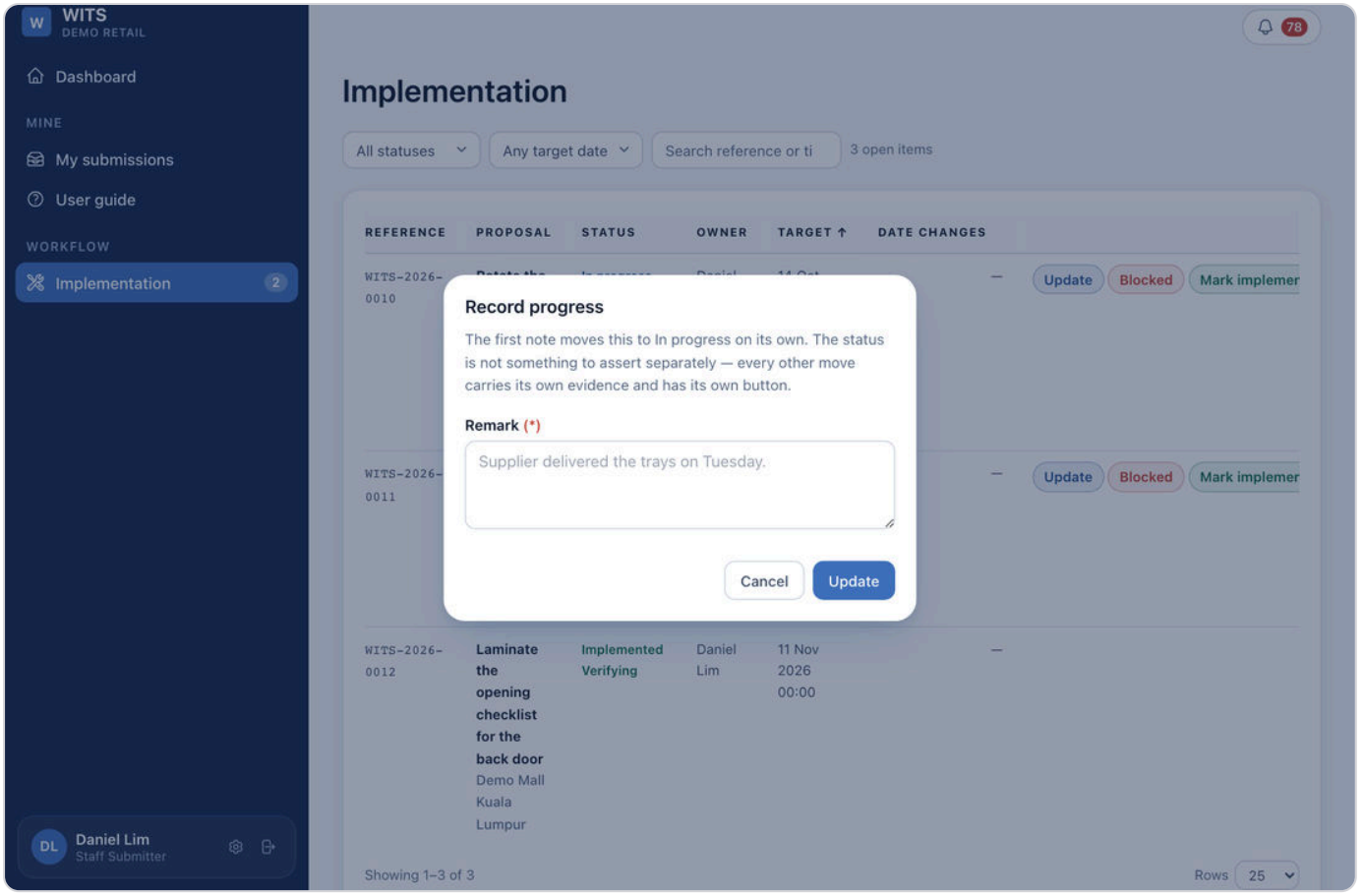
When the Council approves your idea, you are the person who carries it out, by the target date the Council set.

1. Open **Implementation** in the menu. The red number shows how many are waiting.
2. Find your idea. Each row shows the status, the owner and the **Target** date.



Record progress

1. Press **Update** on the row.
2. Write what was done in **Remark**, and press **Update**.



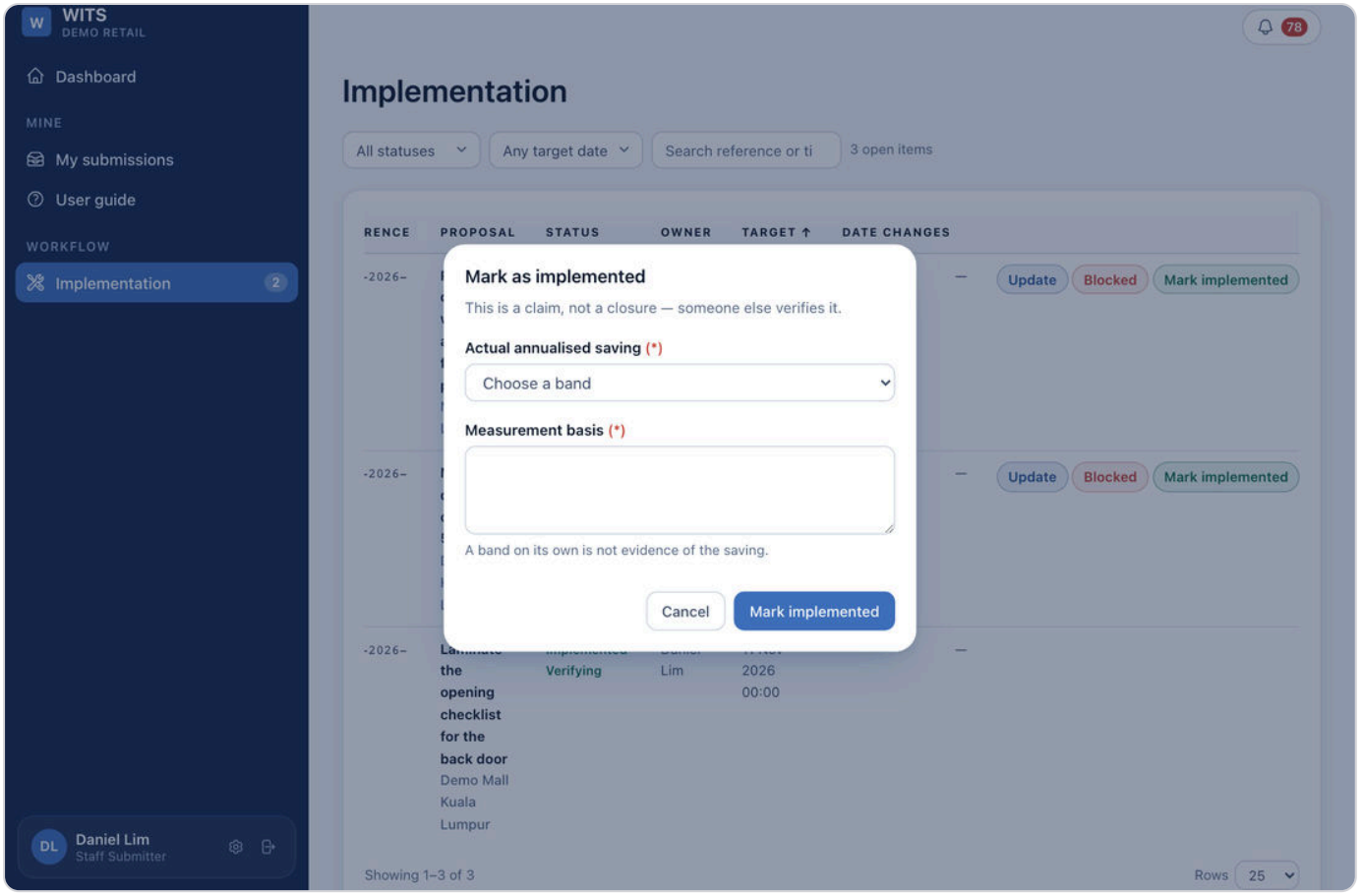
The first update moves the idea to **In progress**.

If something stops the work

Press **Blocked**, write the reason, and pick a date to look at it again. When it can carry on, press **Resume**.

When it is done

1. Press **Mark implemented**.
2. Pick the real saving range under **Actual annualised saving**.
3. Write how you measured it under **Measurement basis**, for example "Timed the lunch queue on four Saturdays".
4. Press **Mark implemented**.



This does not close the idea. A coordinator checks that the change is in use and closes it. See Confirm finished work.

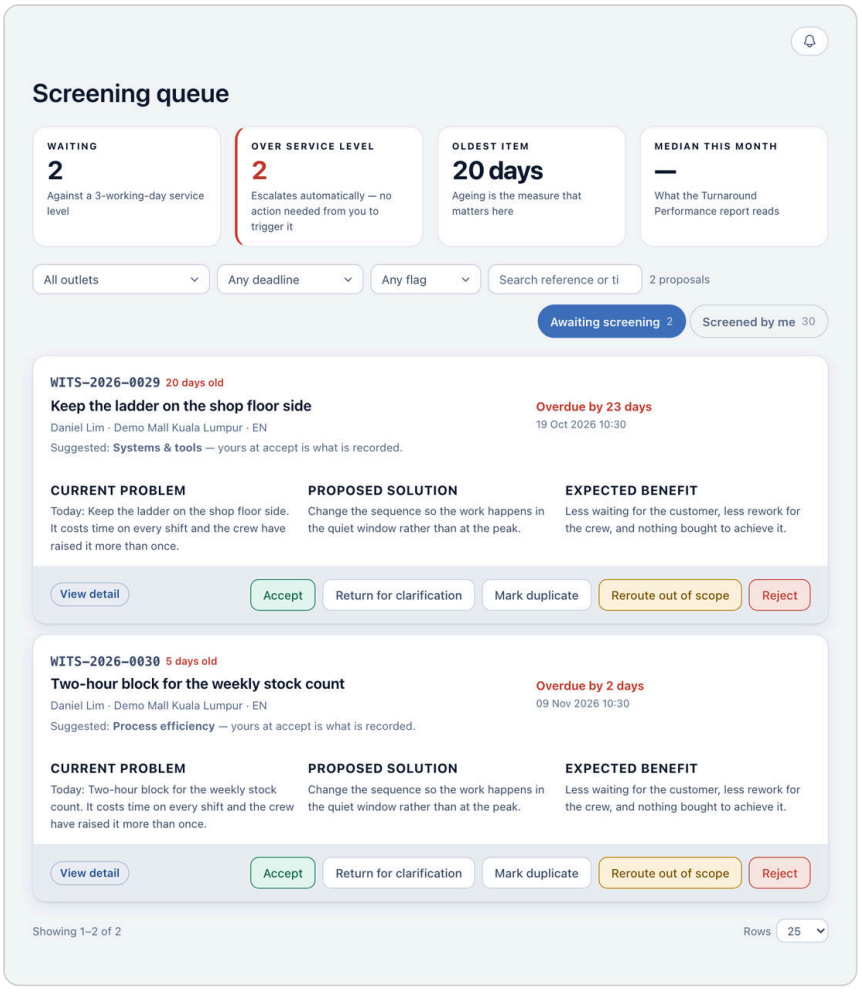
You cannot move your own target date, and you cannot confirm your own work. Ask a coordinator if the date needs to change.

Screen new ideas

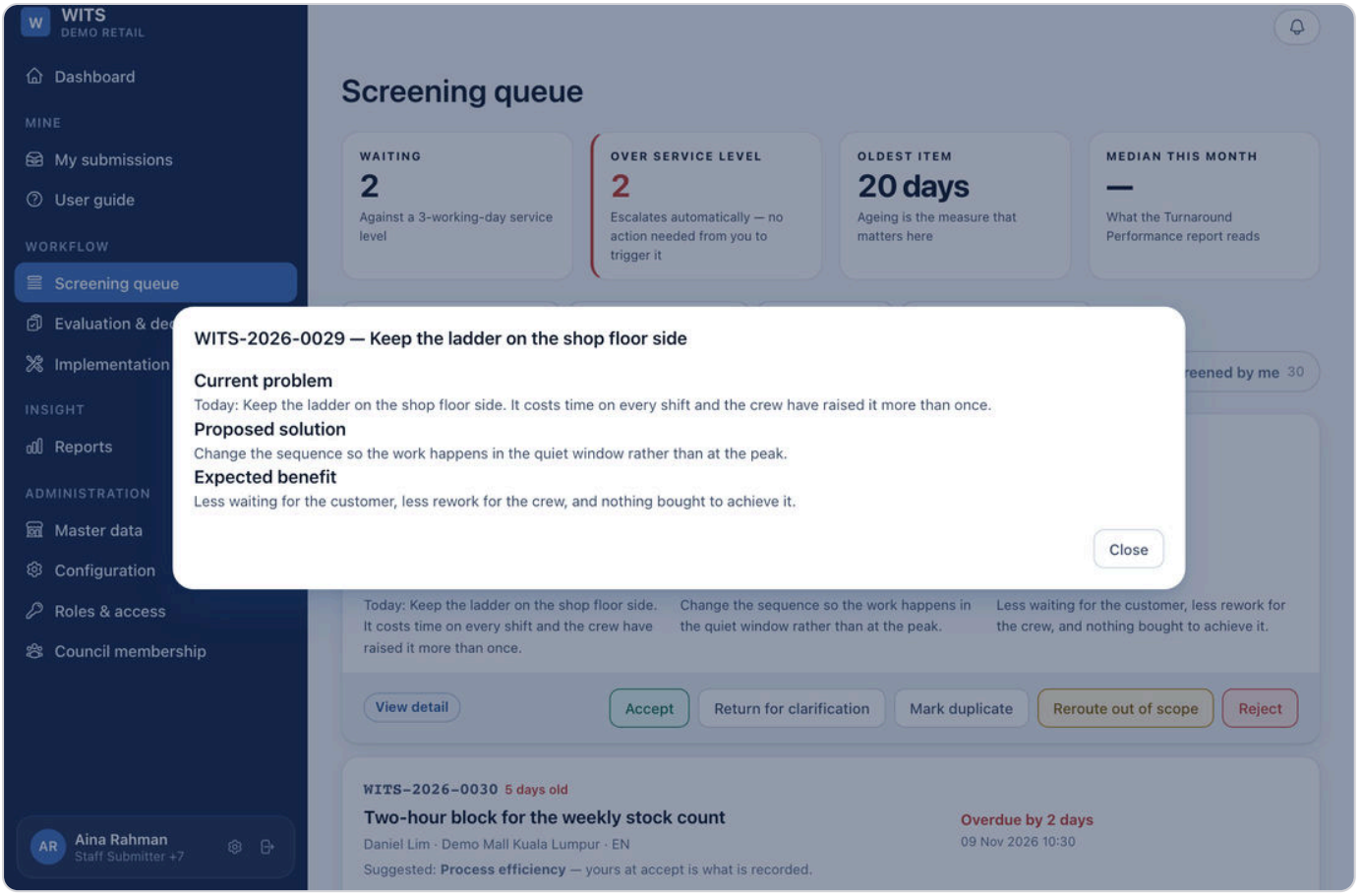
For: WITS Coordinators

You see new ideas from the outlets you look after in your staff record. Each one should be screened within the time limit shown on the card (3 working days unless your administrator changed it).

1. Open **Screening queue** in the menu.
2. The figures at the top show how many are waiting, how many are late, and the oldest one. Use **All outlets** to show one outlet.



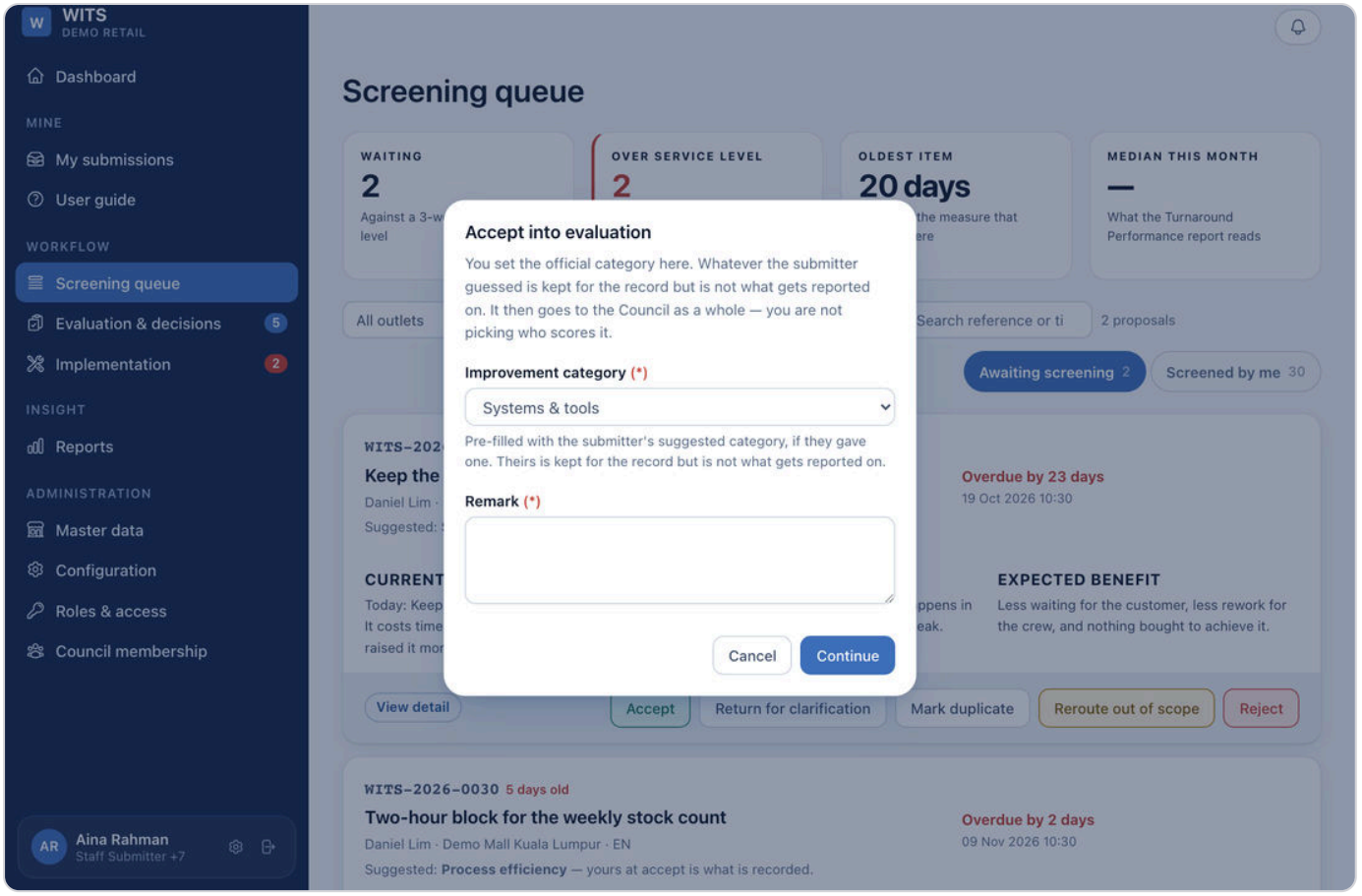
3. Press anywhere on a card to read the whole idea as it was written. Press **Close** to go back.



4. Press one of the five buttons at the bottom of the card:

Button	Use it when	The person who raised it is told
Accept	It is an improvement idea and in scope.	It was accepted, with the category you set.
Return for clarification	You need one more detail.	Your question, word for word.
Mark duplicate	Someone already raised the same change.	Which idea theirs is linked to.
Reroute out of scope	It is an equipment fault or a customer complaint.	Which system now handles it.
Reject	It is out of scope or not about improving work.	It was closed as **Unqualified**, with your reason.

5. Fill in the window. Every choice needs a **Remark**, and the remark is sent to the person who raised the idea. For **Accept**, also choose the **Improvement category**.
6. Press **Continue**, check the idea named in the next window, and press the button again to confirm. Press **Back** to change your mind.



The **Screened by me** tab lists what you decided and why, after the idea has left the queue.

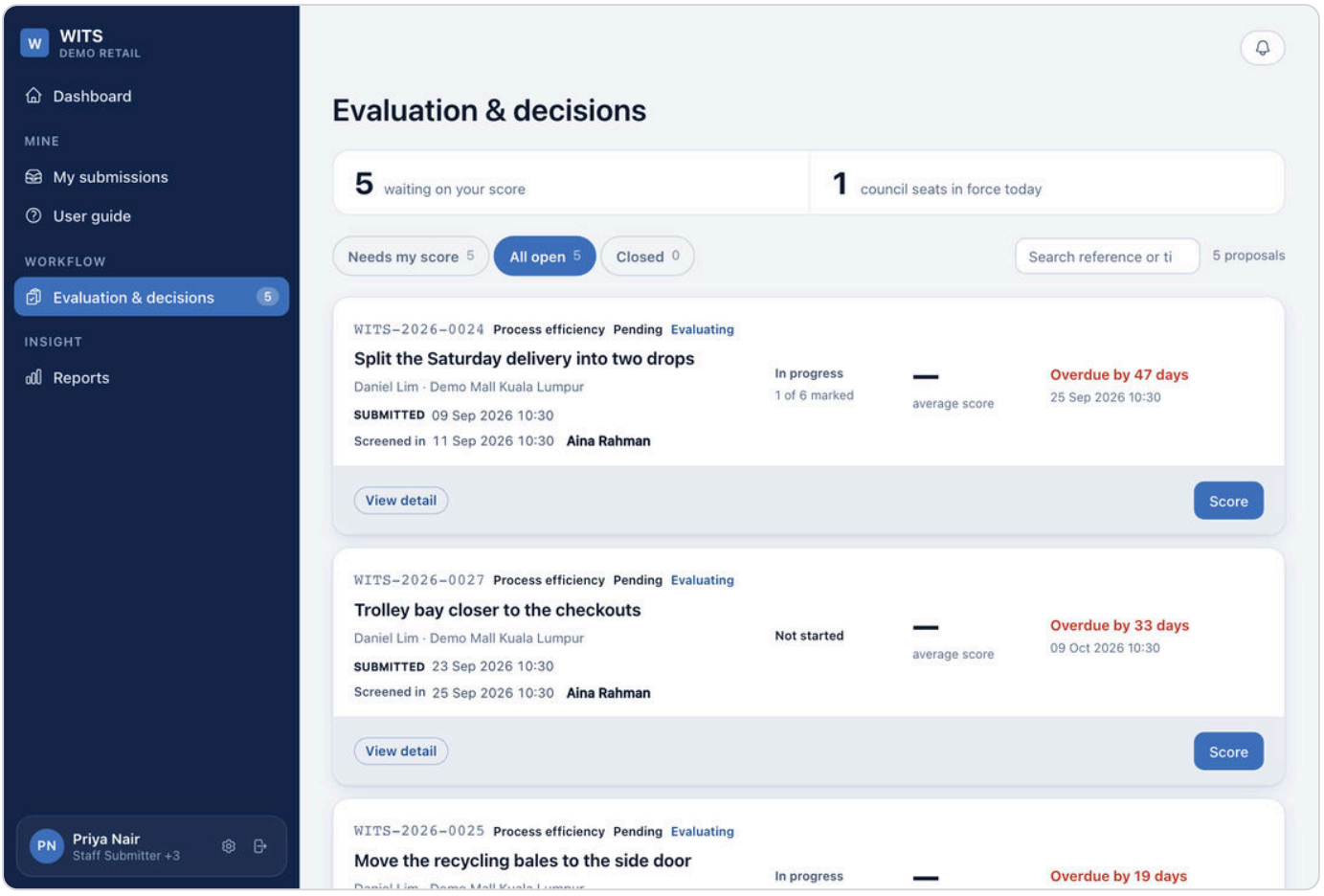
You cannot screen your own idea. If one of yours is in your queue, ask another coordinator to take it.

Score and decide on an idea

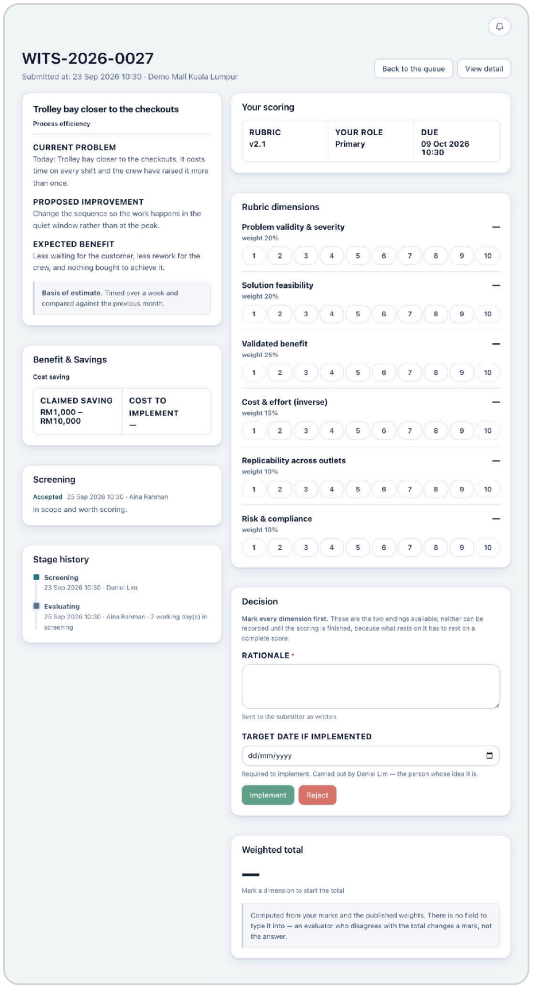
For: WIT Council members

To score, you need two things: a role that lets you score, and a place on the Council (see Give people access). With only one of them, the **Score** button does not appear.

1. Open **Evaluation & decisions** in the menu. **Needs my score** lists the ideas waiting for you.
2. Each card shows how many questions are marked, the average score, and the deadline.



3. Press **Score** on a card. The idea is on the left and the marking on the right.
4. Mark each of the six questions from 1 to 10, for example **Problem validity & severity** and **Solution feasibility**. The **Weighted total** is worked out for you from your marks.
5. Under **Decision**, write the **Rationale**. It is sent to the person who raised the idea, as written.
6. To approve, set **Target date if implemented**, then press **Implement**. Otherwise press **Reject**.



Nothing is saved until you press **Implement** or **Reject**. If you leave the page, your marks are lost.

When the Council has more than one member

- With one member, that member's decision is the Council's, and the person who raised the idea is told the same day.
- With two or more, each member records their own marks and recommendation. Once every member has answered, the majority decides.
- A tie decides nothing. Press **Close scoring** to end it with a reason.

If **Implement** or **Reject** seems unavailable, press it anyway. It tells you what is missing.

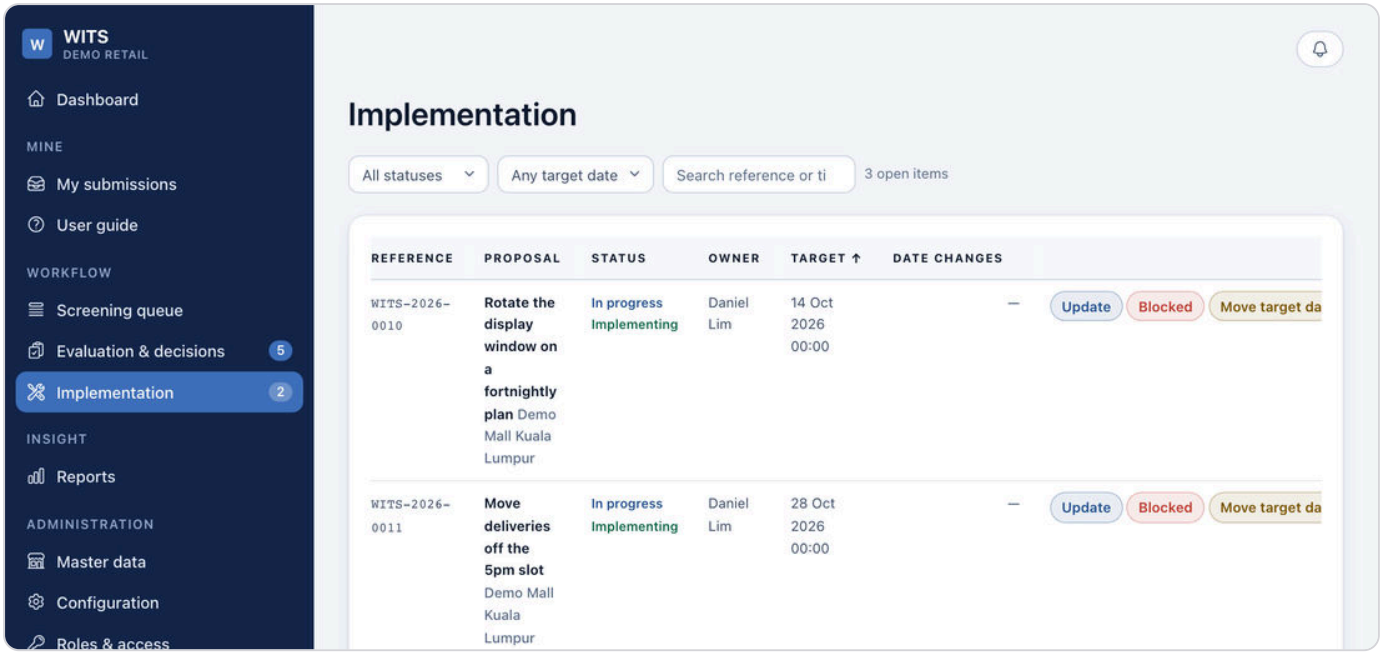
You cannot score your own idea.

Confirm finished work

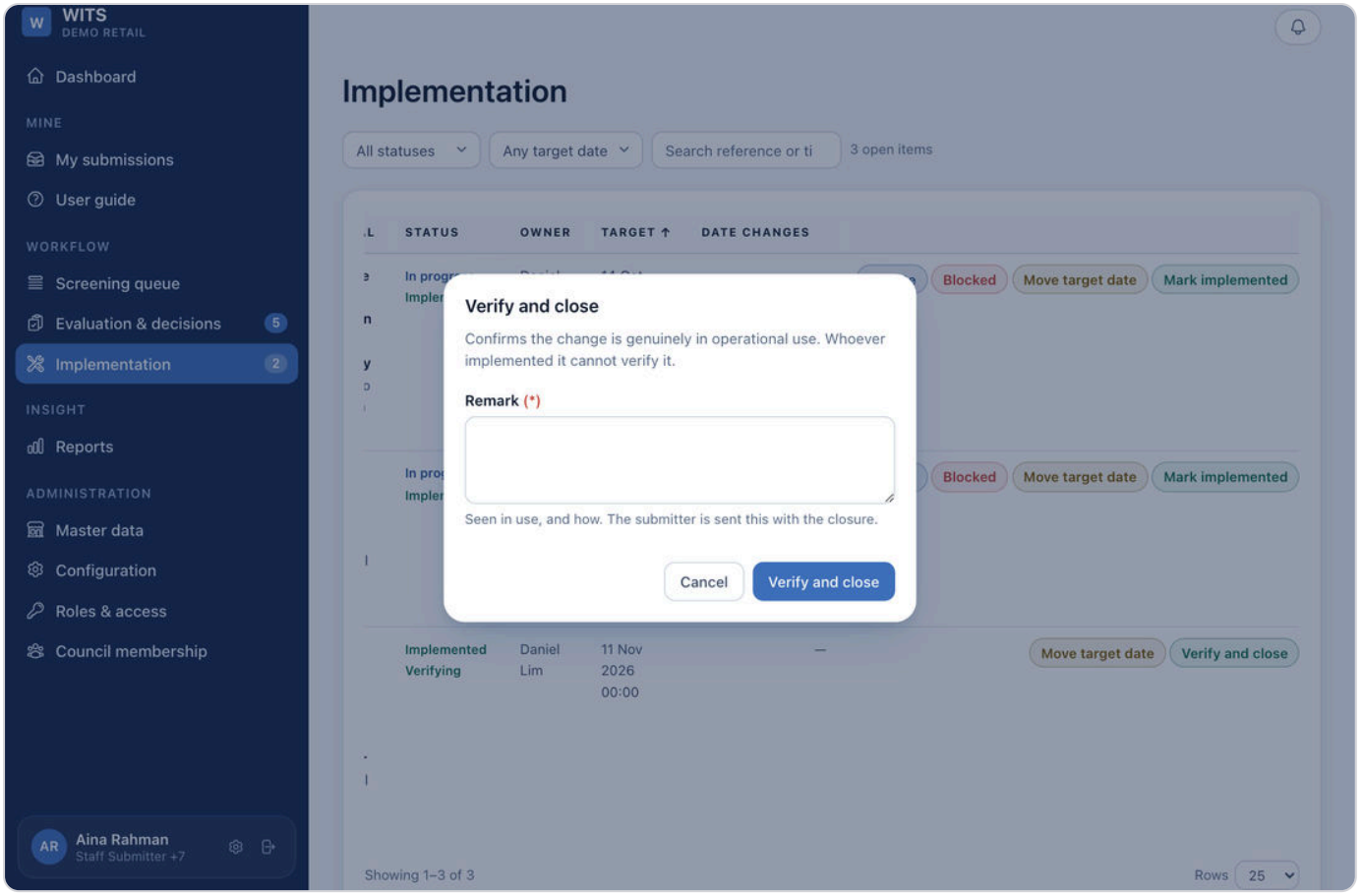
For: WITS Coordinators

When the owner presses **Mark implemented**, the idea waits for someone else to check that the change is really in use.

1. Open **Implementation** in the menu.
2. Find the row with the status **Implemented**. Use **All statuses** to show only those.



3. Check the change in the outlet.
4. Press **Verify and close**.
5. Write what you saw, and how, in **Remark**. The person who raised the idea receives it.
6. Press **Verify and close**.



The status becomes **Completed**: done, in use, and checked by someone else.

Move a target date

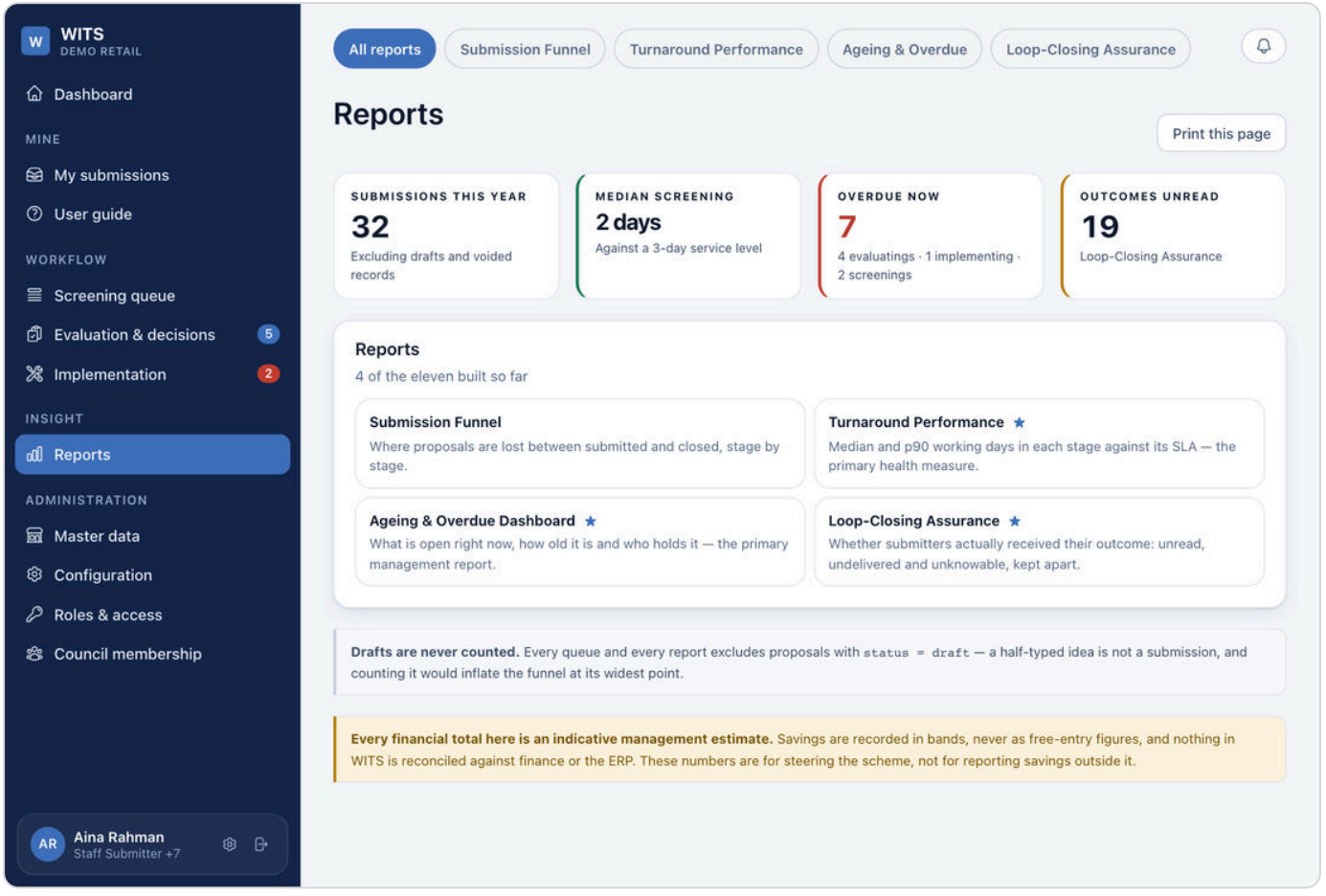
Only a coordinator can move a target date. Press **Move target date**, pick the new date and give the reason. The original date is kept, so the reports still show how late it is against the first promise.

You cannot verify work you carried out yourself. This rule applies to everyone, administrators included.

Read the reports

For: Managers

1. Open **Reports** in the menu.
2. The top row shows this year's submissions, how fast screening is, what is late, and how many answers have not been read.
3. Press a report to open it:
    - **Submission Funnel**: how many ideas reach each stage, and where they stop.
    - **Turnaround Performance**: how many working days each stage takes, against its time limit.
    - **Ageing & Overdue Dashboard**: what is open now, how old it is, and who has it.
    - **Loop-Closing Assurance**: whether people actually received and read their answer.



Each report can be narrowed to a period and an outlet. Press a figure to see the ideas behind it. Press **Print this page** to print it or save it as a PDF.



Drafts are never counted. Savings are added up from the ranges people picked, so every money total is an estimate. It is not checked against your accounts.

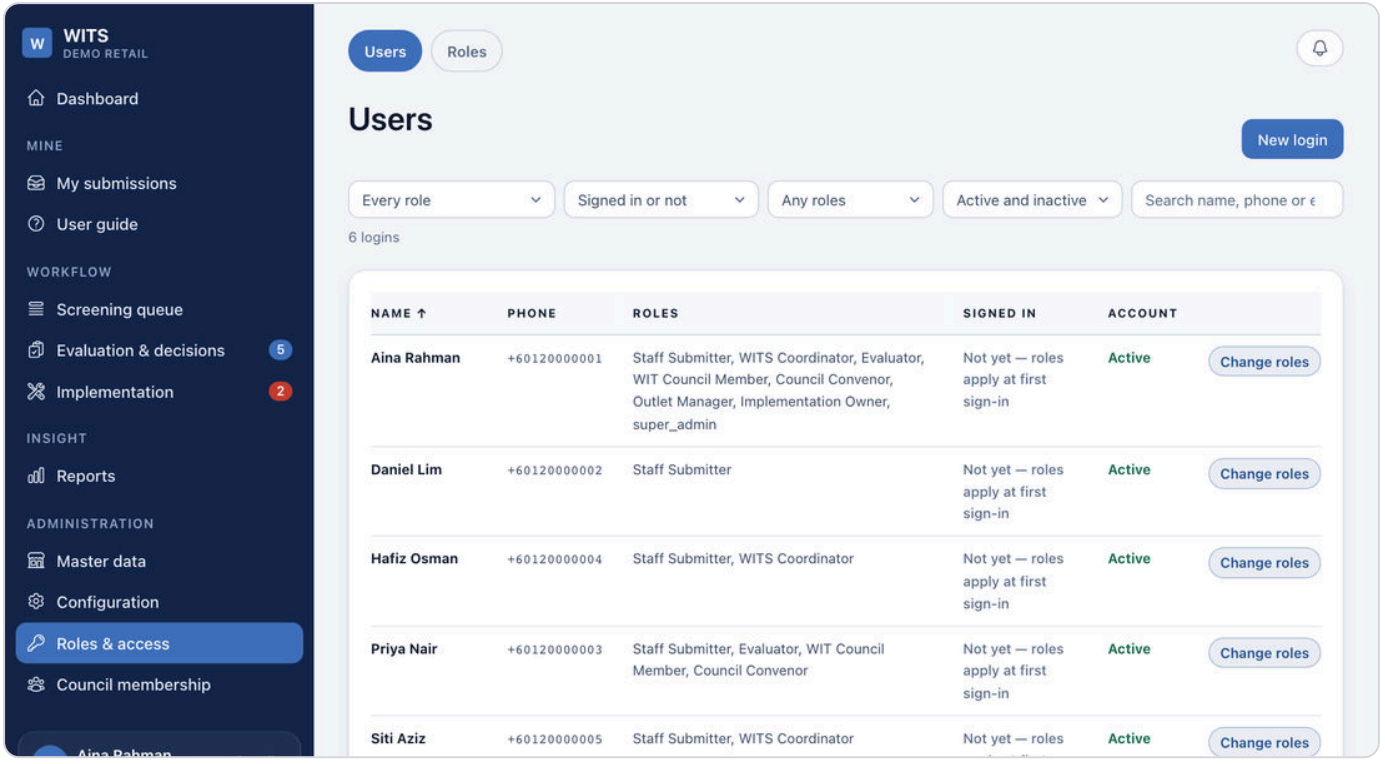
Give people access

For: Administrators

A person appears in WITS the first time they sign in, with the **Staff Submitter** role. Anything more is given here.

Change someone's roles

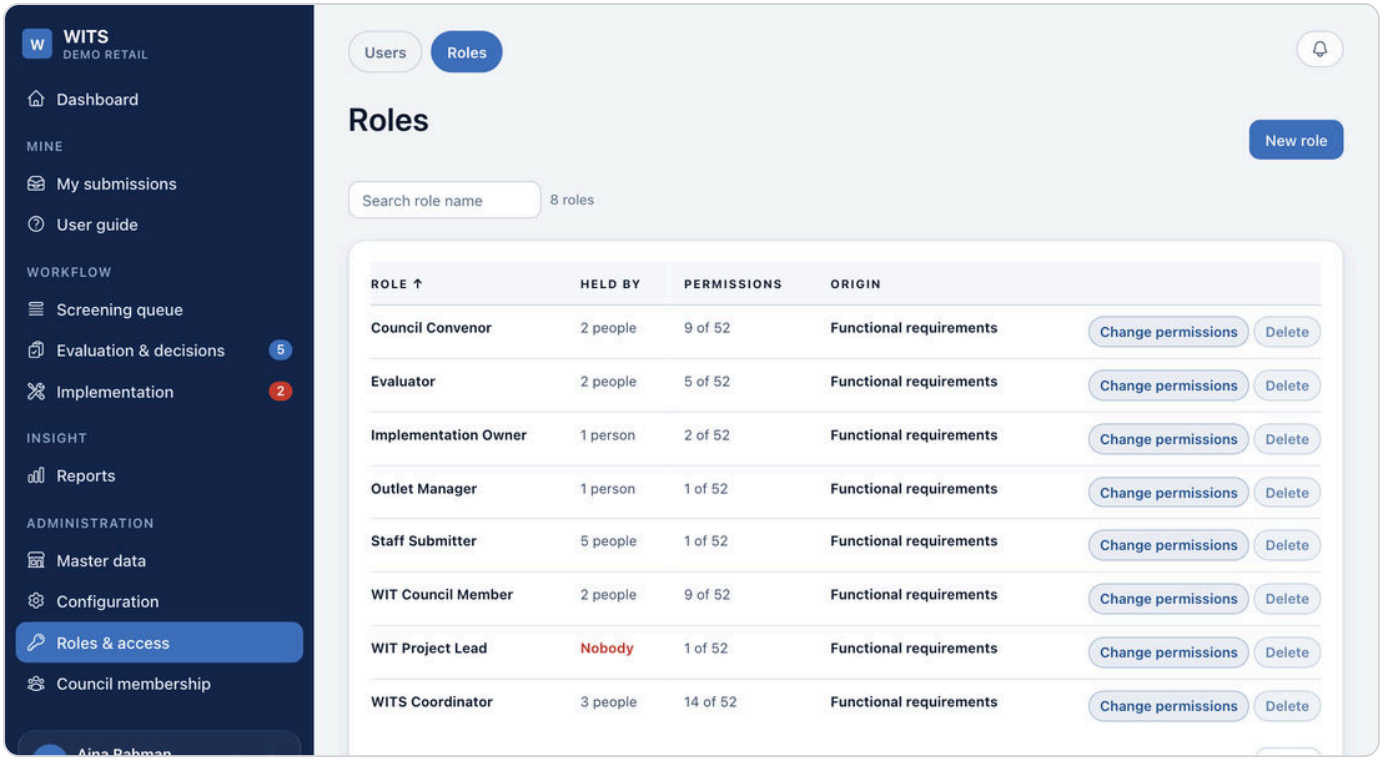
1. Open **Roles & access** in the menu. The **Users** tab lists everyone with their roles.
2. Press **Change roles** on the person's row, tick the roles, and press **Save**.



To give someone a role before their first sign-in, press **New login**. It does nothing until that person signs in.

Change what a role can do

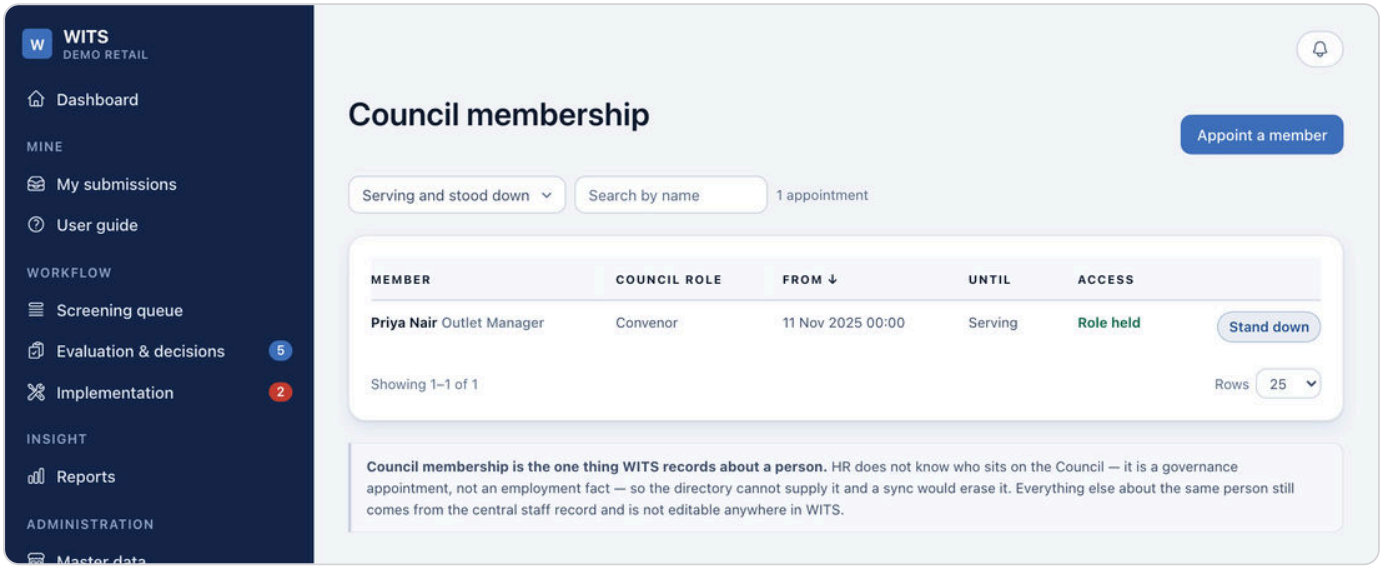
1. Open the **Roles** tab.
2. Press **Change permissions** on a role, tick what it may do, and press **Save**. Press **New role** to make one.



Seat someone on the Council

Scoring needs a place on the Council as well as a role.

1. Open **Council membership** in the menu.
2. Press **Appoint a member**.
3. Choose the **Staff member**, the **Council role** (**Member** or **Convenor**), and the date under **Appointed from**.
4. Press **Appoint**. This also gives the matching Council role.



To end a place, press **Stand down**. Past places are kept, because past decisions are counted against them.

Things a role cannot change

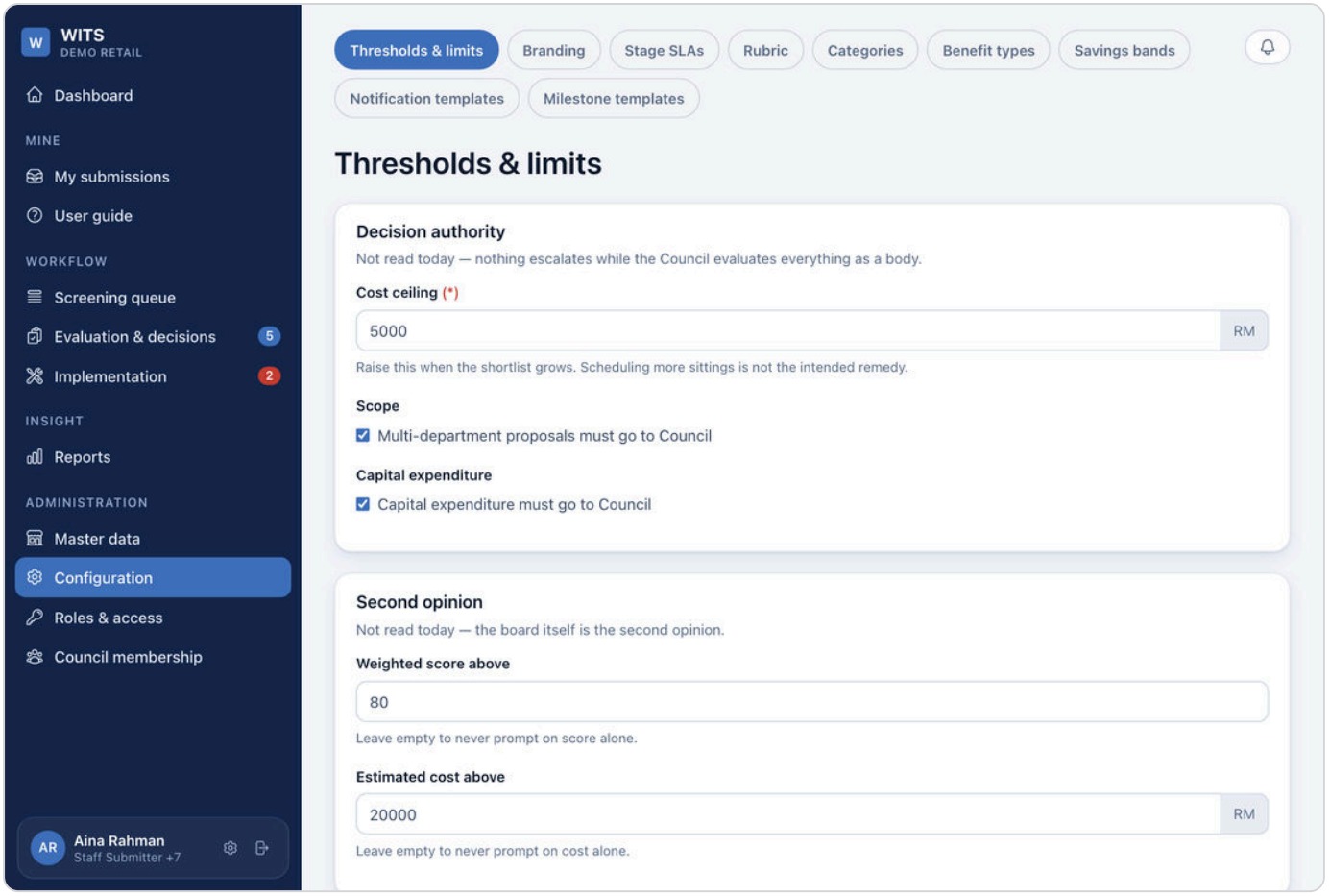
- Which outlets a coordinator looks after comes from the staff records, not from a role.
- Nobody can screen or score their own idea, or confirm their own work. No role or administrator can turn this off.
- Someone HR has marked as left cannot sign in, even if their login still exists. They stay in the **Users** list so you can see what access they had.

Change the rules and the name

For: Administrators

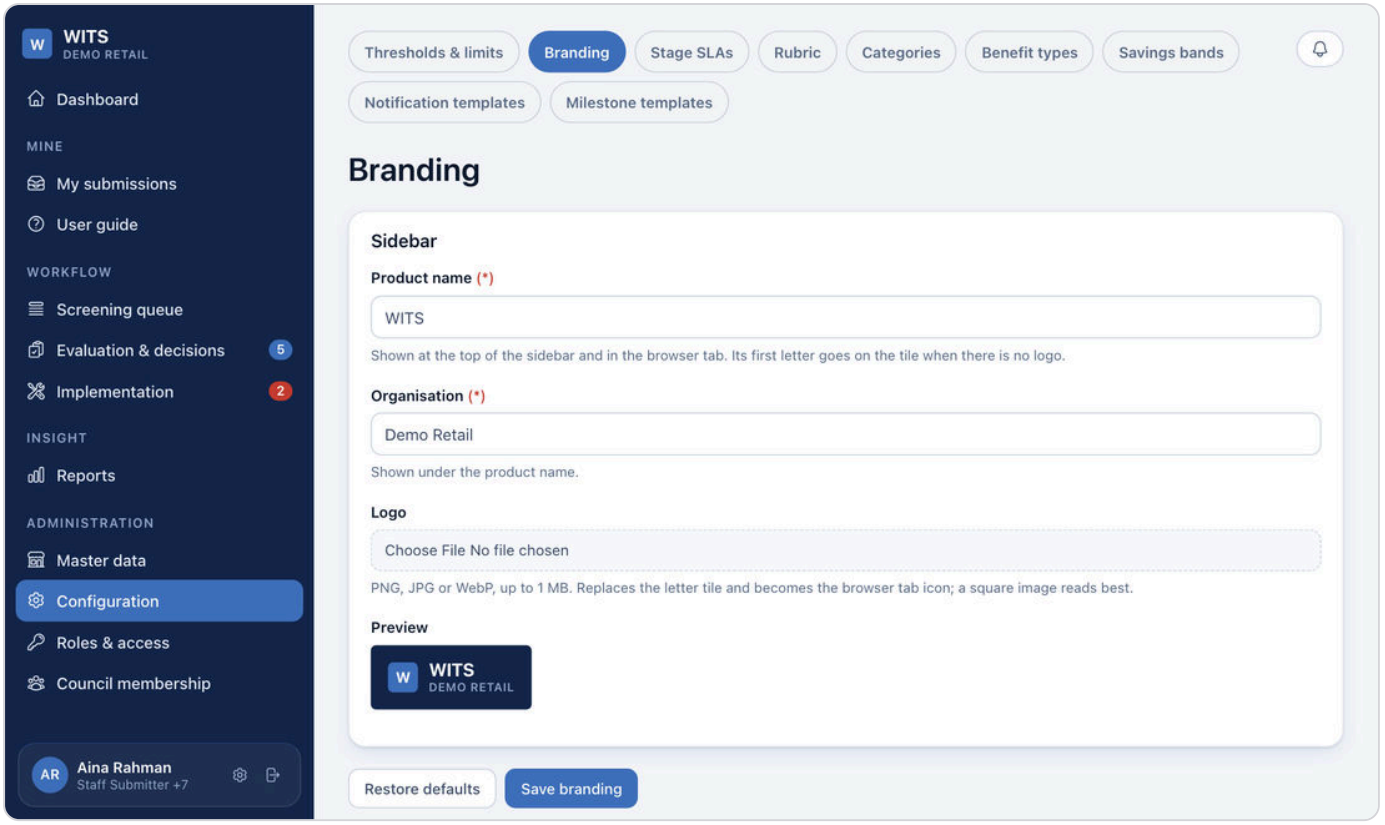
Open **Configuration** in the menu. The tabs along the top are:

Tab	What it sets
Thresholds & limits	Council size needed to decide, file size limits, how many ideas a person can submit a day, and how long records are kept.
Branding	The name and logo at the top of the menu.
Stage SLAs	The time limit for each stage, in working days.
Rubric	The scoring questions and their weights.
Categories	The improvement categories a coordinator can choose.
Benefit types	The ticks under **Type of benefit** on the idea form.
Savings bands	The saving ranges people pick from.
Notification templates	The wording of each notification, in English, Bahasa Malaysia and Chinese.
Milestone templates	Standard steps offered when an idea is turned into a larger project.



Change the name and logo

1. Open the **Branding** tab.
2. Change **Product name** and **Organisation**. Both show at the top of the menu.
3. Under **Logo**, upload a PNG, JPG or WebP picture up to 1 MB. A square picture works best. Without a logo, the first letter of the product name is shown.
4. Check the **Preview**, then press **Save branding**. **Restore defaults** puts the original name back.



A saving range that has already been used cannot be edited, because that would change the scores of past ideas. On **Savings bands**, press **Retire** on it and add a new one with **New band**.

Staff and outlets under **Master data** can be read but not changed. They come from your company's staff records.

USER GUIDE · VERSION 1

Recruitment

Hiring from start to finish: an outlet asks for a new position, management approves it, applicants apply on their phone, interviewers score them, and an approver signs off the offer.

1. What it is for
2. Apply for a job
3. Take the test and book your interview
4. Request a new position
5. Approve a position request
6. Open a job posting
7. Review applications and shortlist
8. Give interview feedback
9. Make the hiring decision and approve the offer
10. Manage interviews from the admin screens
11. Set interviewer availability
12. Set up outlets, panels and approvers
13. Settings, roles and the application form

What it is for

For: Everyone

Recruitment replaces the paper job application and the chain of approvals around it. One hire goes through these steps:

1. **An outlet manager asks for a position** on a request form, for example "one Store Supervisor for Penang".
2. **Management approves or rejects the request** from a link sent to them on WhatsApp.
3. **HR opens a job posting** from the approved request. It appears on your company's careers page.
4. **Applicants apply on their phone.** They need no account. The app scores each application. A high score shortlists the applicant at once: they take a short personality test (if the job has one) and pick an interview time.
5. **Interviewers rate the applicant.** The key interviewer, the one who decides for that outlet, recommends hiring or not and, for a hire, types in the offer terms.
6. **An approver checks the offer and signs it** on their phone. The applicant gets the offer letter on WhatsApp.

HR can also shortlist, schedule and decide by hand in the admin screens.

Who uses it

Person	What they do	How they get in
Applicants	Apply, take the test, book an interview	The careers page and WhatsApp links. No account.
Requisition Requester (role)	Asks for a new position	The request page, with a code sent to their phone
Management Approver (role)	Approves or rejects position requests	A WhatsApp link, with a code sent to their phone
Interviewers	Rate applicants after the interview	The admin screens, signed in
Approvers	Make the hiring decision and sign the offer	A WhatsApp link, with a code sent to their phone

Person	What they do	How they get in
Hr Admin (role)	Runs job postings, applications and setup	The admin screens: the Recruitment web address with **/admin** at the end

Interviewers and approvers are picked per outlet (see "Set up outlets, panels and approvers"). An interviewer needs an account whose role lets them open applications and their interviews (see "Settings, roles and the application form").

What it needs

- **A WhatsApp sending service.** Every invitation, phone code, approval link, reminder and offer goes out through it. SMS goes through the same service. Without it, the app writes the messages into its own log and nobody receives them. Your system administrator connects it.
- **Outlets** with an address, an interview panel and approvers. HR enters them on the **Outlets** page.
- **Staff accounts** for HR, interviewers and approvers, each with a phone number. Adding a person needs your system administrator: the **Users** page does not open today, even for Hr Admin.

What needs other outside services

Feature	Needs	Without it
Interviewer free time read from Google Calendar	Google Calendar, set up by your administrator	Use the weekly schedule typed into the app instead
Suggested Questions on the interview feedback page	An AI service, and the server's background tasks running	The box keeps showing "Generating tailored questions..."
AI Screenings (an AI chats with the applicant on WhatsApp)	An AI service and a second WhatsApp connection on the **WhatsApp Session** page	Not available
External Test assessments	Your company's online test service	Use the built-in DISC test only
Interview reminders and automatic rejections	The server's background tasks running	Not sent

Applicants can switch the screens to English, Bahasa Melayu, Chinese, Bengali or Nepali with the **EN** button at the top.

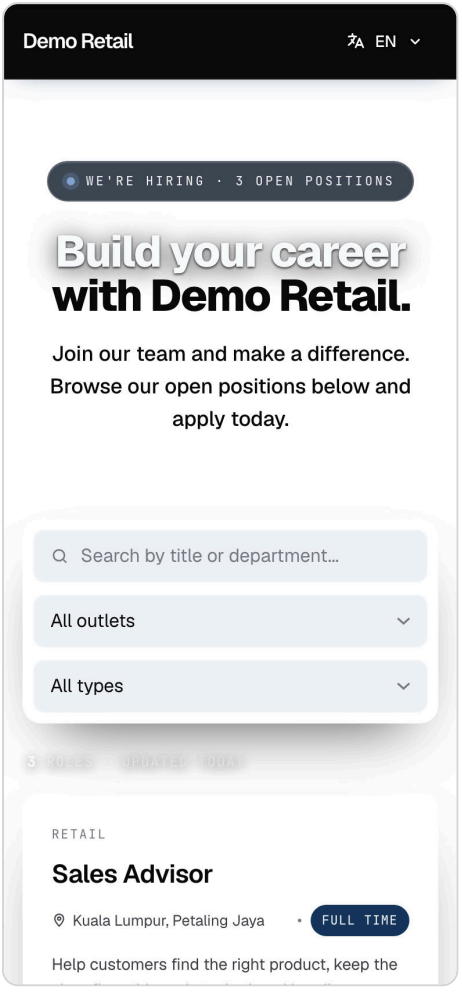
RECRUITMENT

Apply for a job

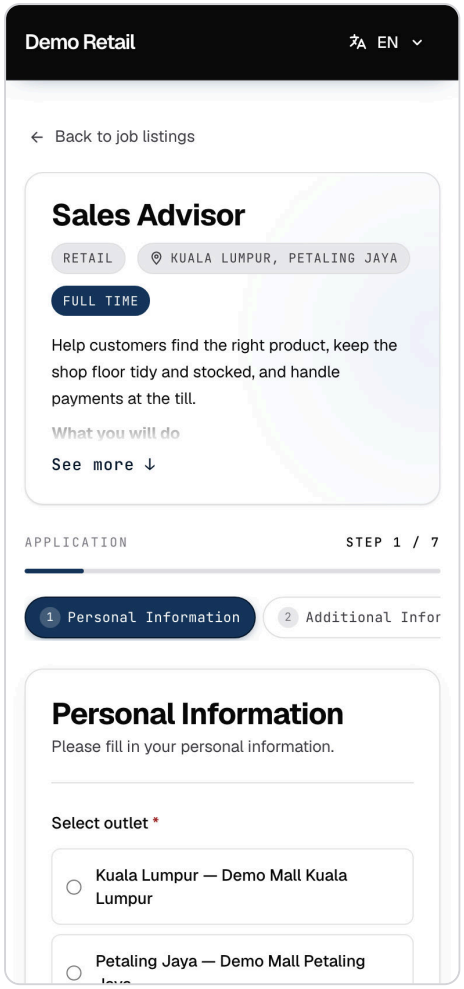
For: Applicants

You apply on your phone. You do not need an account or a password. Have your identity card number, your school and work history, and a copy of your resume ready. It takes about 20 minutes.

1. Open the careers page your company shared. Each open job has an **Apply Now** button. Use **Search**, **All outlets** and **All types** to narrow the list.

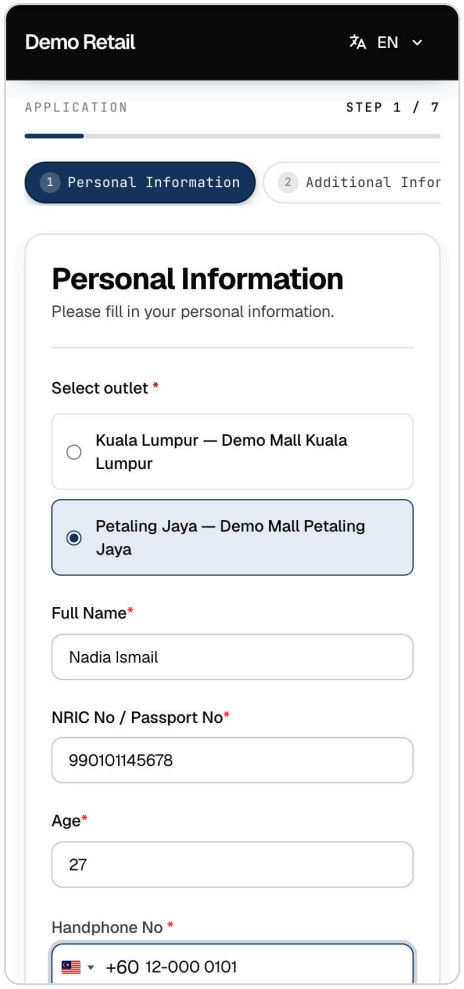


2. Press **Apply Now** on the job you want. Read the job description; press **See more** to read all of it.

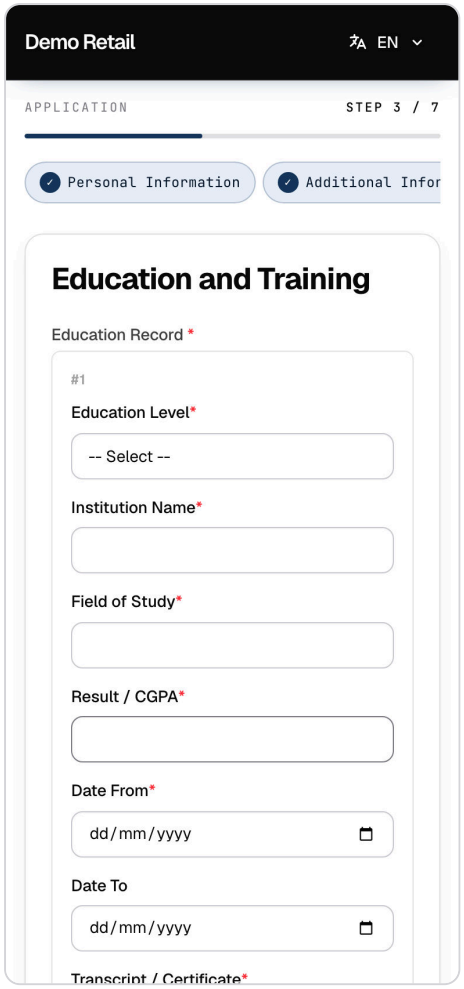


3. The form has 7 parts, shown at the top as **Step 1 / 7** and so on: Personal Information, Additional Information, Education and Training, Language Proficiency, Employment Details, Document Uploads and Authorization. A red star means the answer is required.

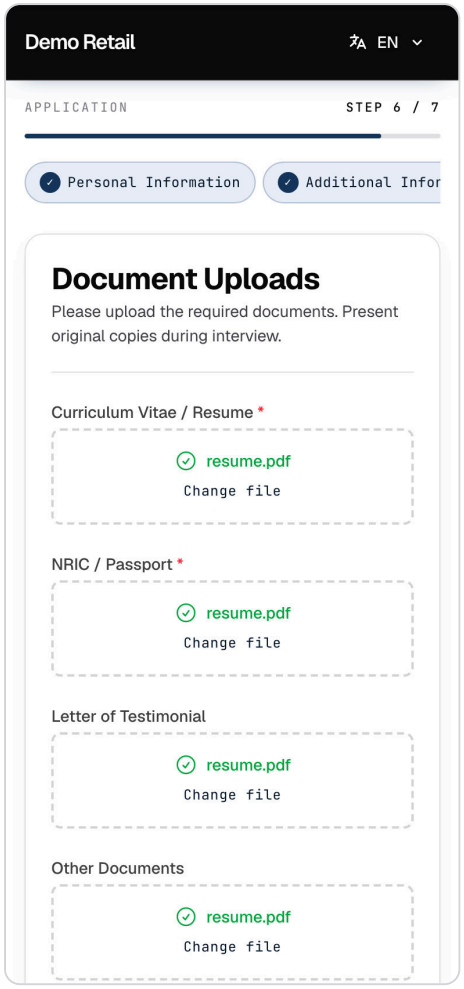
   In **Personal Information**, first choose the outlet you want to work at under **Select outlet**, then fill in your details. **Age** fills in by itself from your identity card number.



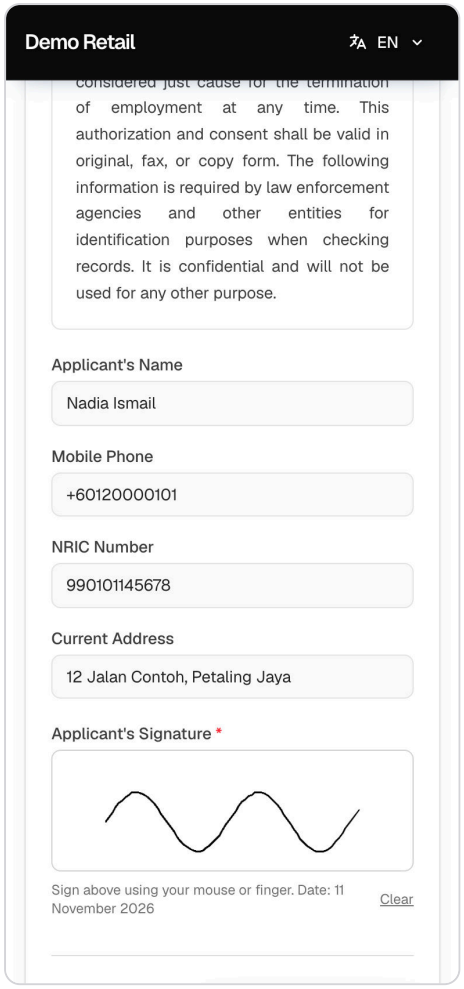
4. Press **Continue** at the bottom of each part. If something is missing, the part stays open and the empty field is marked.
5. Where you can list more than one school or job, press **Add another** for each extra one.



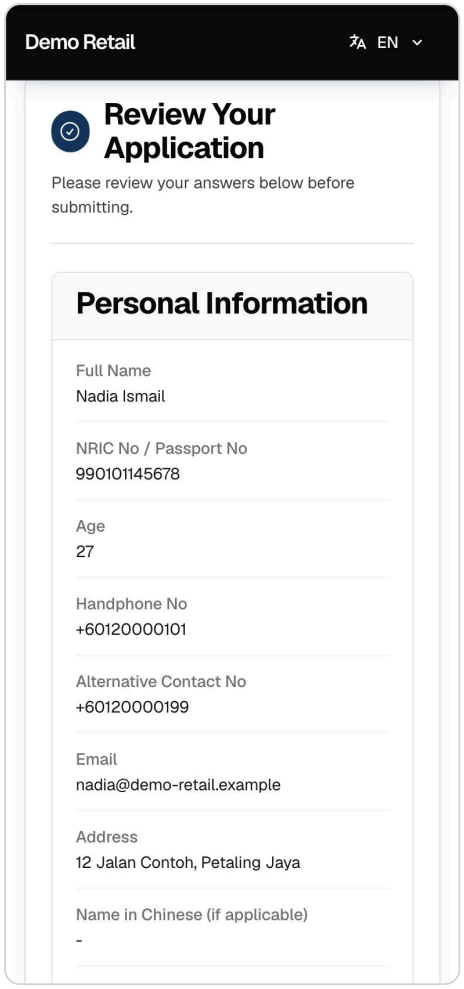
6. In **Document Uploads**, press **Click to upload** under each item and choose a photo or file from your phone. A green tick and the file name show when it is in. Press **Change file** to replace it.



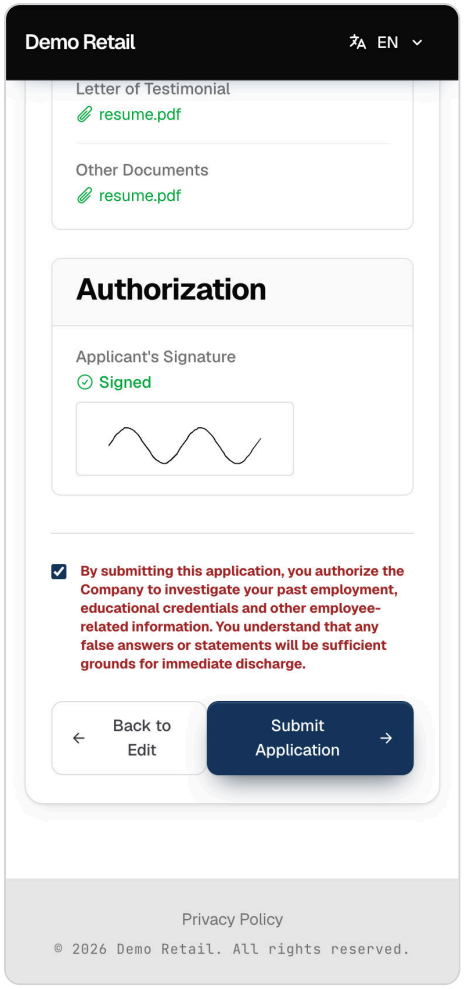
7. In **Authorization**, read the text, check your name, phone, identity card number and address, and sign in the box with your finger. Press **Clear** to sign again. Then press **Review Application**.



8. On **Review Your Application**, check every answer. Press **Back to Edit** to change something.

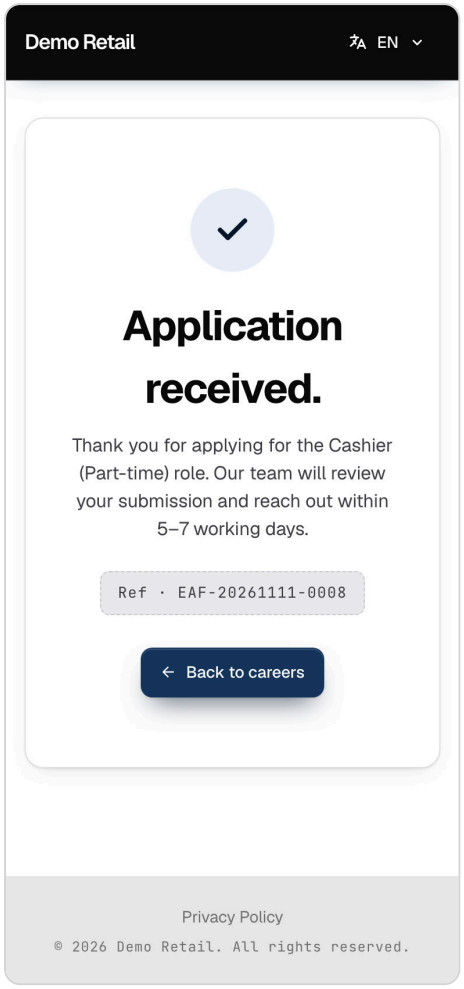


9. At the bottom, tick the box that lets the company check your past jobs and education, then press **Submit Application**.



What happens next

- **If your application scores high enough for that job**, the screen goes straight on to the next step: see "Take the test and book your interview". Stay on the page.
- **Otherwise** you see **Application received.** with a reference number (it starts with **EAF-**). Keep it. HR reviews the application and contacts you.



- If your company has set a minimum score for the job and your application is below it, you get a WhatsApp message saying you were not selected, 2 days later by default.

RECRUITMENT

Take the test and book your interview

For: Applicants

You reach this step in one of two ways:

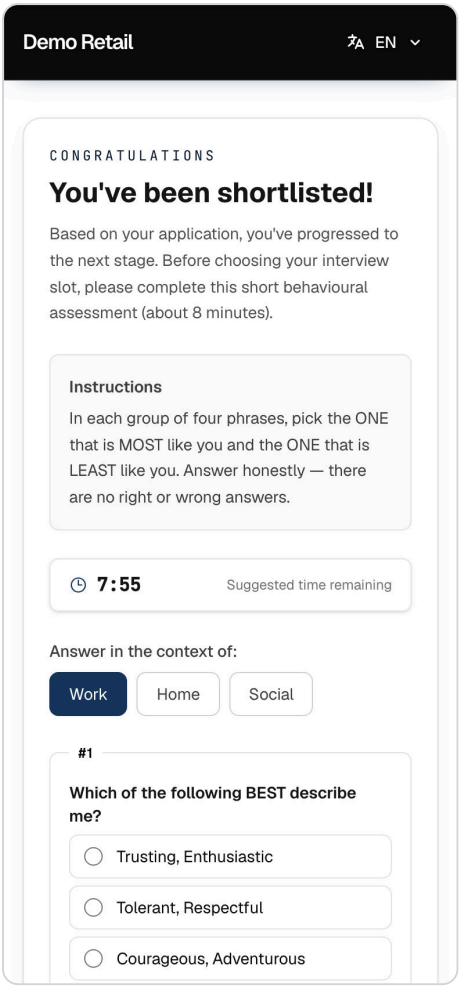
- **Straight after applying**, when your application scored high enough. The page opens by itself.
- **From a WhatsApp message** when HR shortlists you later. Press the link in the message.

If you were shortlisted straight after applying, finish this step before you close the page. No WhatsApp link is sent in that case. If you closed it, ask HR to send you the link.

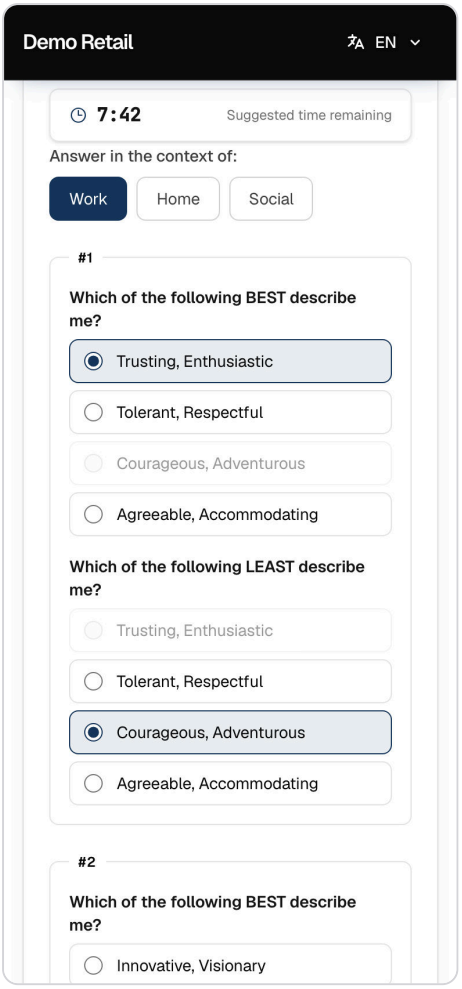
The personality test

Some jobs ask for a short personality test first (DISC, about 8 minutes). If the job has none, you go straight to the dates.

1. Read **Instructions**. Under **Answer in the context of:**, choose **Work**, **Home** or **Social**.



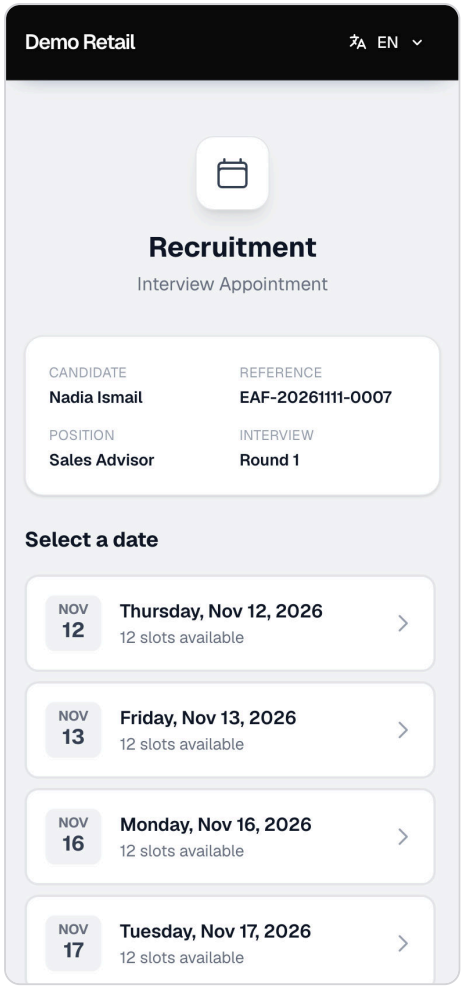
2. Each numbered group has four phrases. Under **Which of the following BEST describe me?** pick the one most like you. Under **Which of the following LEAST describe me?** pick the one least like you. The same phrase cannot be both.



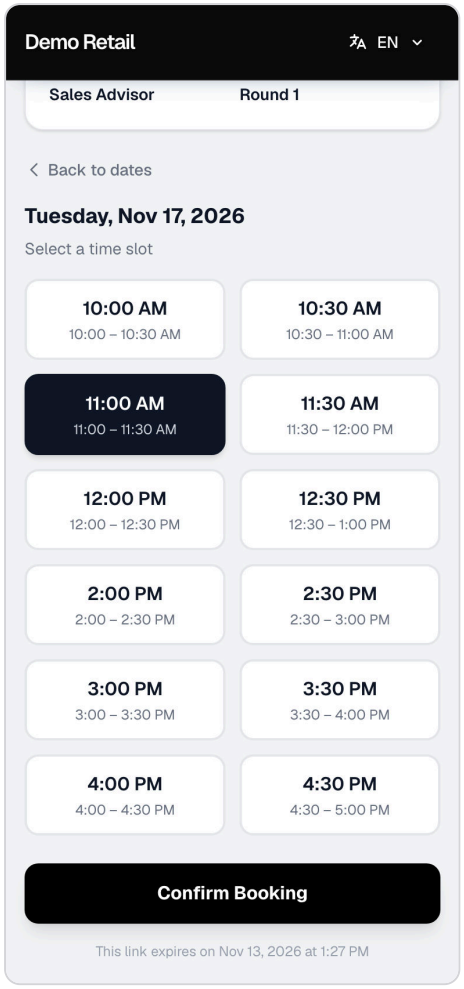
3. Answer every group, then press **Submit & Continue**. The timer is a guide only; you can finish after it runs out. There are no right or wrong answers.

Book your interview

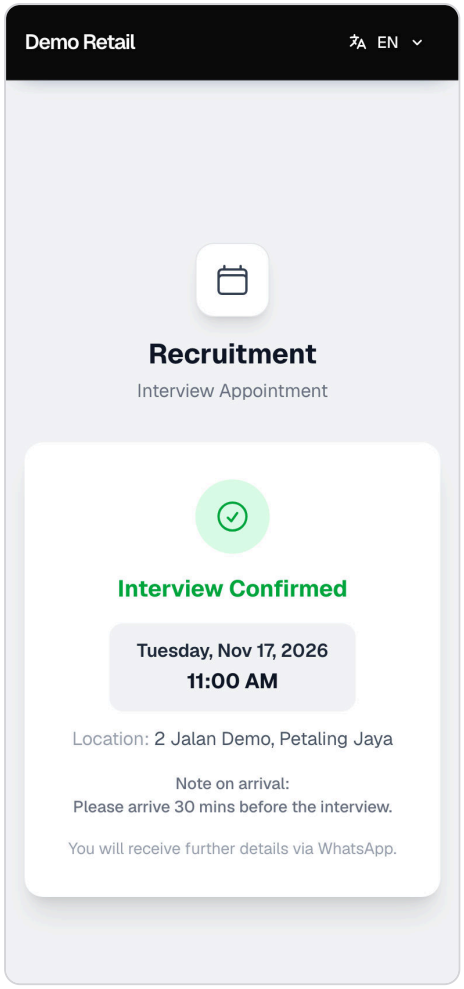
4. Under **Select a date**, press a day. Each day shows how many time slots are free.



5. Press a time under **Select a time slot**, then press **Confirm Booking**. Press **Back to dates** to pick another day.



6. **Interview Confirmed** shows the date, time and the outlet's address. Take a screenshot of it.



Good to know

- The page says "You will receive further details via WhatsApp." Today no message is sent when you book. You get WhatsApp reminders 24 hours and 2 hours before the interview, if your company has them switched on.
- The link expires; the date is at the bottom of the page ("This link expires on..."), 48 hours after it was sent by default. If it has expired, ask HR to send a new one.
- To change your interview time after booking, ask HR. They can send you a new link.

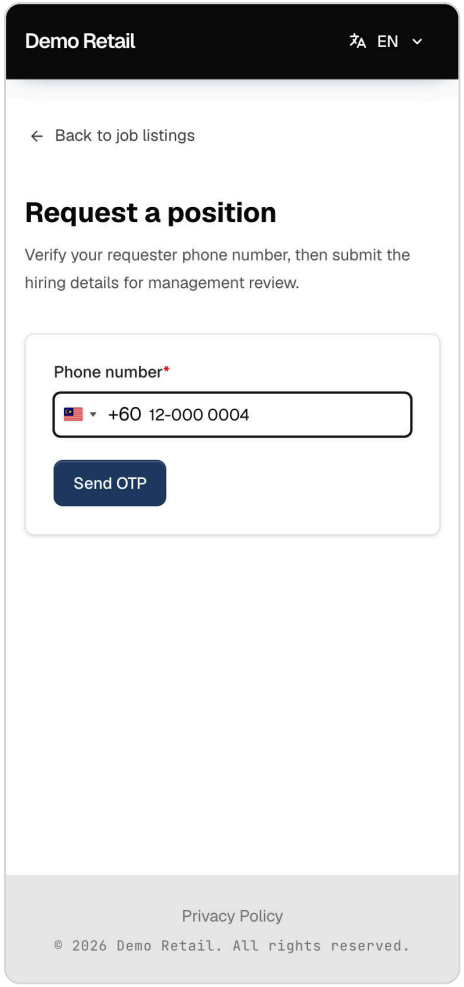
RECRUITMENT

Request a new position

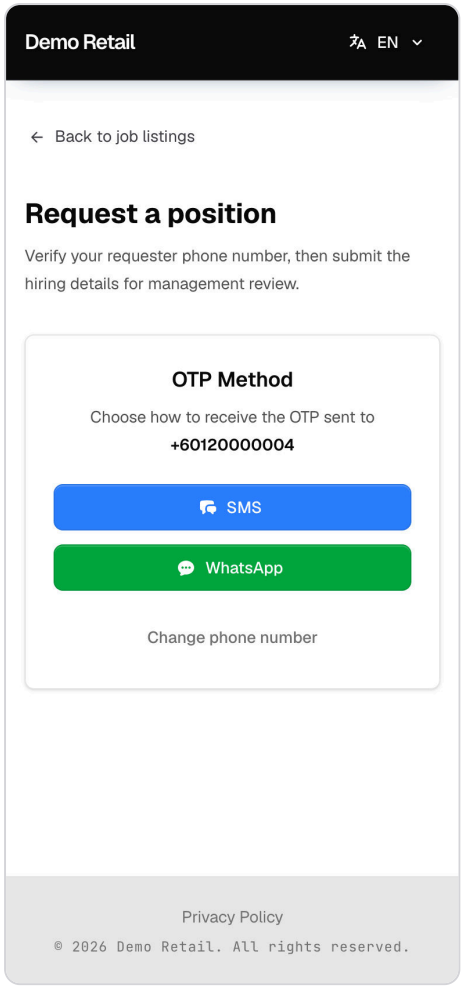
For: Outlet managers

Use this when your outlet needs to hire. Your request goes to management for approval. Your account needs the **Requisition Requester** role and your phone number; ask HR if you are not set up. HR gives you the web address of the request page.

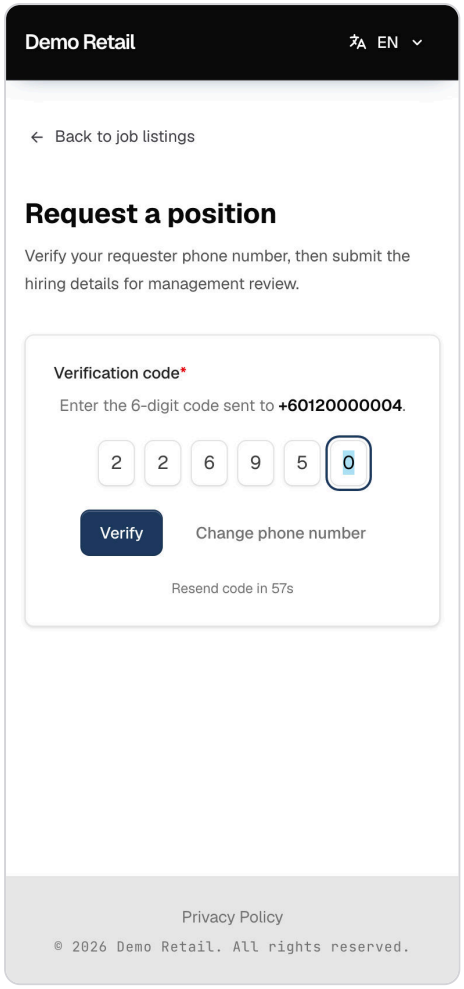
1. Open the request page. Type your phone number under **Phone number** and press **Send OTP** (OTP, a one-time code).



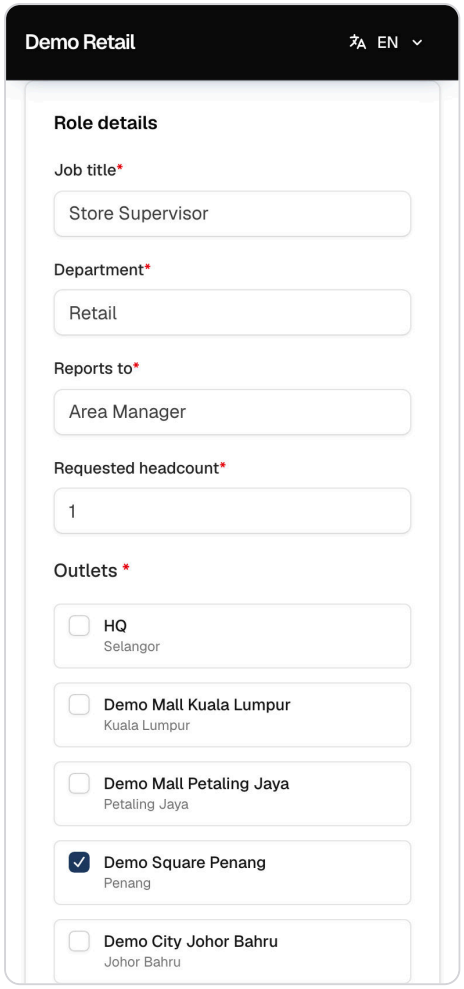
2. Choose **WhatsApp** or **SMS**.



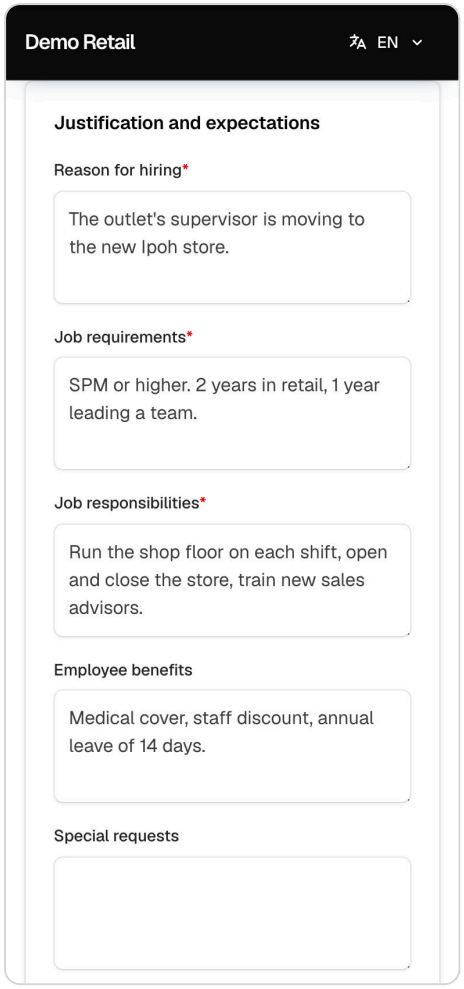
3. Type the 6-digit code under **Verification code** and press **Verify**. The code works for 10 minutes. If it does not arrive, wait for the countdown and press **Resend Code**.



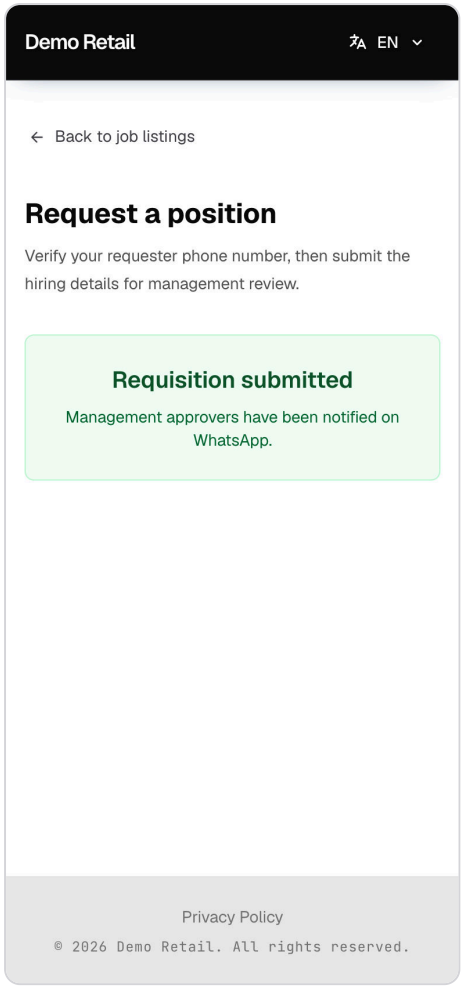
4. Fill in the form. Everything with a red star is required.
    - **Role details**: **Job title**, **Department**, **Reports to**, **Requested headcount** (how many people), and tick the **Outlets** that need them.
    - **Employment details**: **Recruitment type** (**New position** or **Replacement**; for a replacement, name the person under **Replacement person**), **Employment type**, **Position level**, **Anticipated start date**, **Minimum years experience** and **Minimum education level**.
    - **Compensation and workplace**: **Salary min**, **Salary max**, **Allowance**, **Working location** and **Working hours**.



- **Justification and expectations**: **Reason for hiring**, **Job requirements**, **Job responsibilities**, and if you like **Employee benefits** and **Special requests**. HR copies the responsibilities into the job advert.



5. Press **Submit requisition**. You see **Requisition submitted**.



Good to know

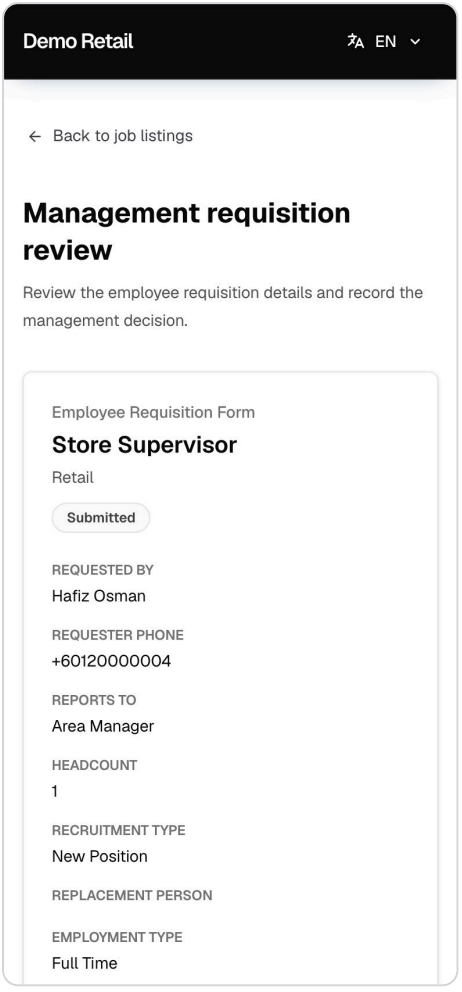
- Every person with the **Management Approver** role gets a WhatsApp link to your request. The first one to decide settles it.
- You are not told the result. Ask HR, or open **Requisitions** in the admin screens if your account can sign in there: the **Status** column shows **Submitted**, **Management Approved** or **Management Rejected**.
- "This phone number is not authorized to submit requisitions." means your account does not have the **Requisition Requester** role, or has a different phone number. Ask HR.
- HR can also enter a request for you: **Requisitions**, then **New requisition**, in the admin screens.

Approve a position request

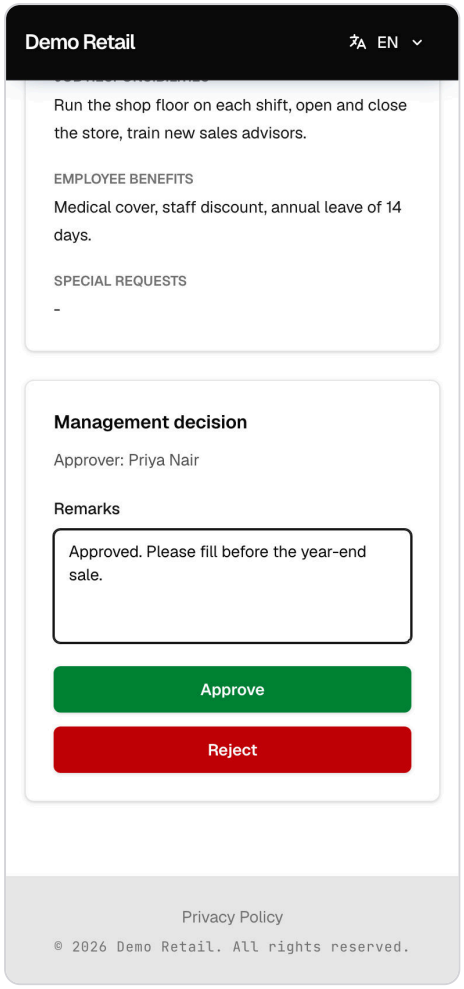
For: Management approvers

When an outlet asks for a new position, you get a WhatsApp message with a link. It works for 7 days. You need the **Management Approver** role and your phone number on your account.

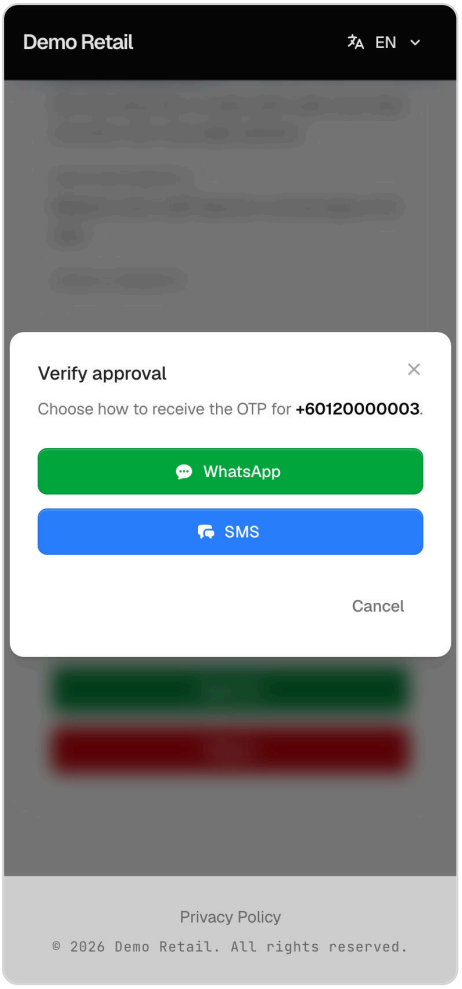
1. Press the link. **Management requisition review** shows the whole request: job, headcount, salary range, outlets, the reason for hiring and the job requirements.



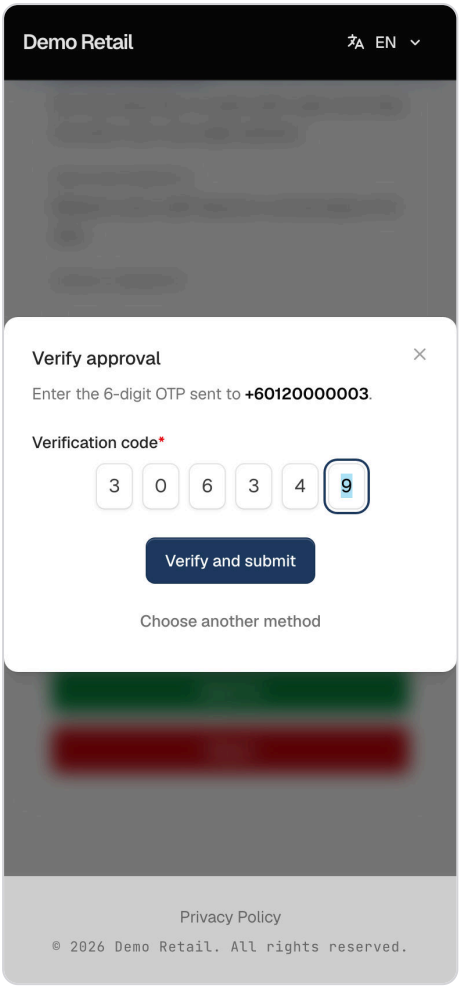
2. Scroll to **Management decision**. Type a note under **Remarks** if you want to, then press **Approve** or **Reject**.



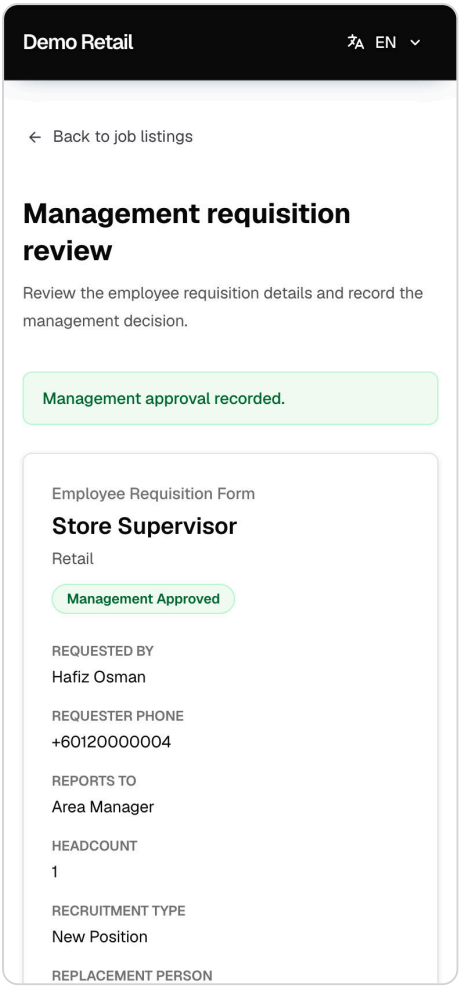
3. **Verify approval** opens. Choose **WhatsApp** or **SMS** to get a code on your phone.



4. Type the code under **Verification code** and press **Verify and submit**. Press **Choose another method** if the code does not come.



5. You see **Management approval recorded.** and the status changes to **Management Approved** (or **Management Rejected**).



Good to know

- Every Management Approver gets the same request. Once one of you decides, the others' links show "This request was already approved by..." with the name and time.
- An approved request lets HR open the job posting. Nobody else is told automatically; tell the outlet manager yourself if they are waiting.
- **"Approval link expired"**: the 7 days have passed. The page tells you to ask HR for a fresh link, but the app has no way to send one today, and no approve button in the admin screens. The outlet manager has to send the request again.
- No signature is collected on this page. The phone code is the proof.

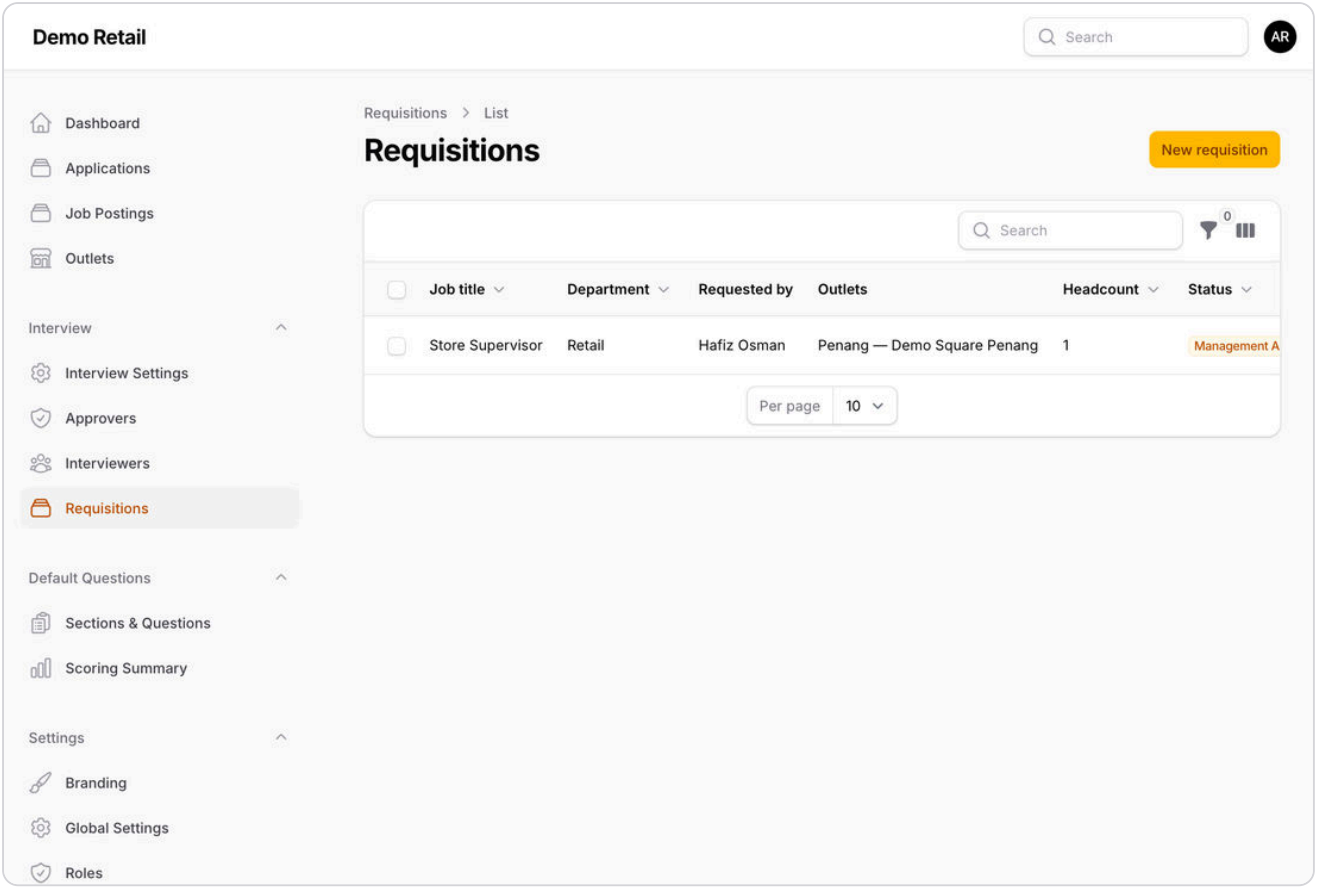
RECRUITMENT

Open a job posting

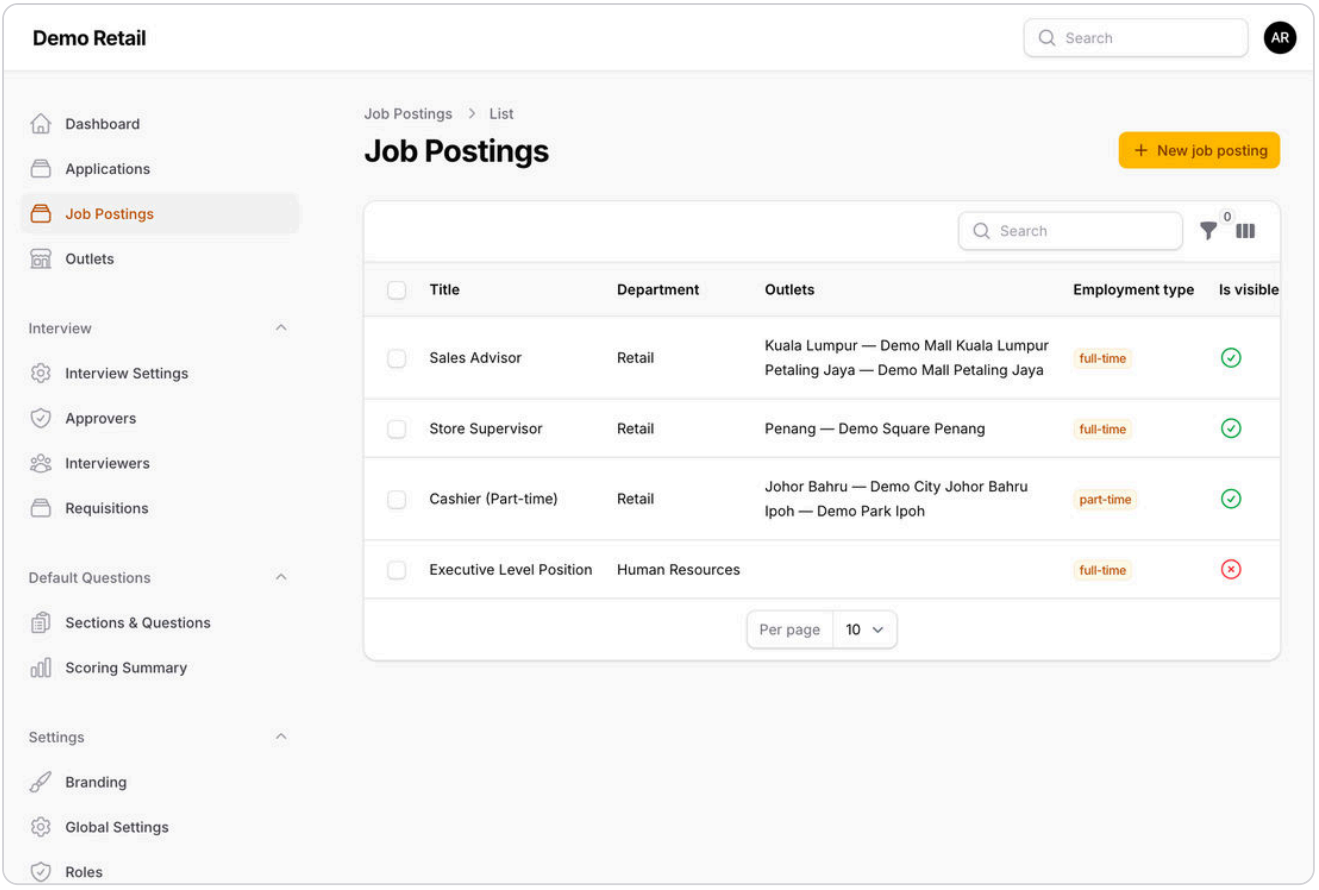
For: HR

A job posting is one open job on the careers page. You open it from an approved position request. Sign in to the admin screens: the Recruitment web address with **/admin** at the end.

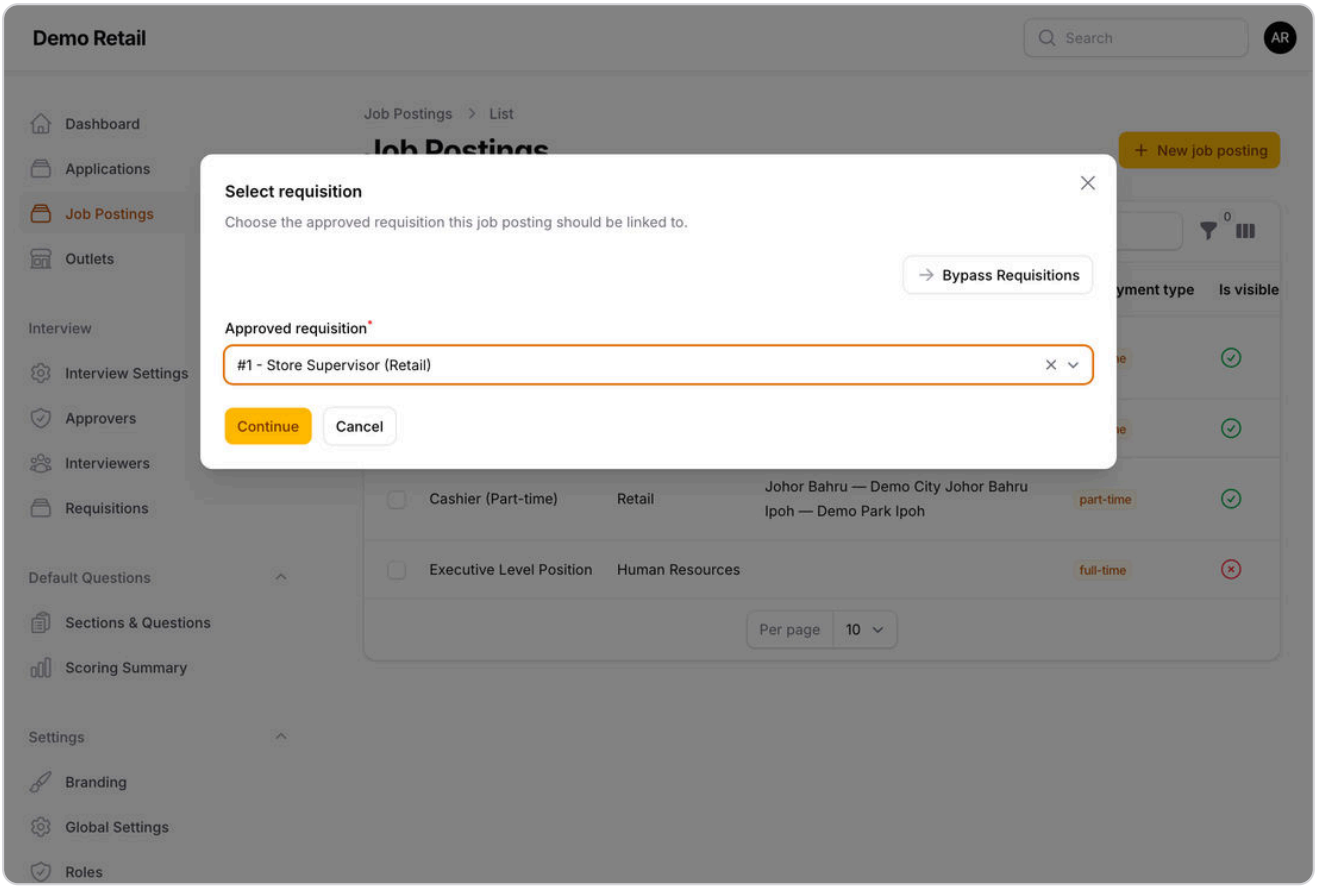
1. Check the request is approved: in the menu on the left, under **Interview**, press **Requisitions**. The **Status** column must say **Management Approved**.



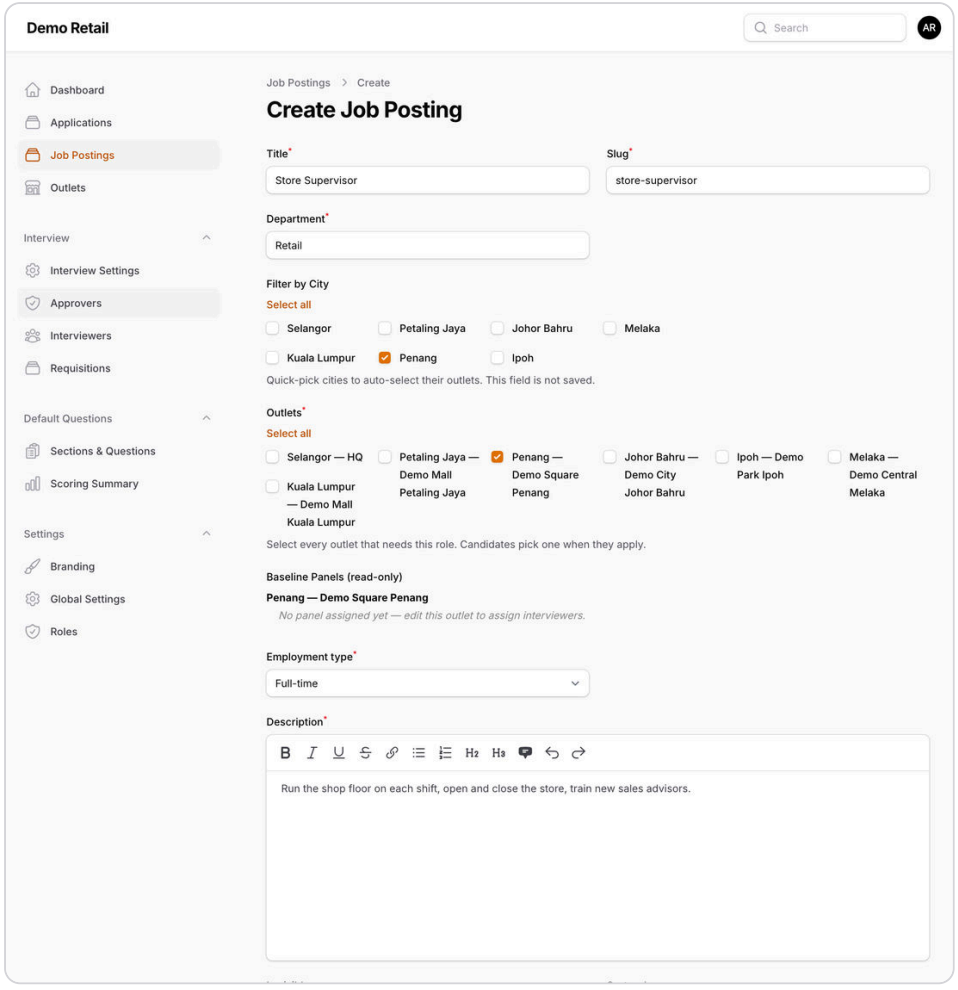
2. Press **Job Postings**, then **New job posting** at the top right.



3. In **Select requisition**, pick the request under **Approved requisition** and press **Continue**. With the Hr Admin role you can also press **Bypass Requisitions** to start an empty posting without a request.



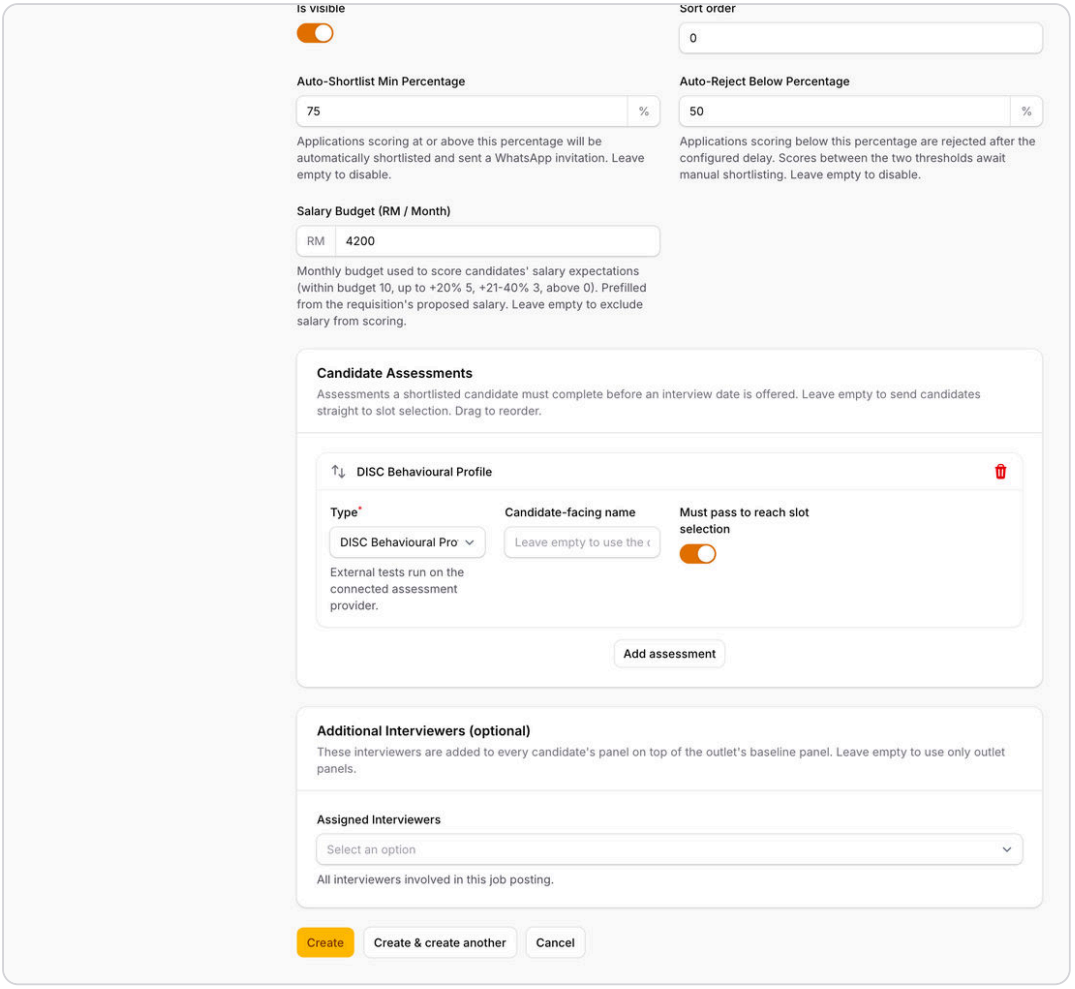
4. **Create Job Posting** opens with the title, department, outlet, employment type, description and salary budget copied from the request. Check them:
    - **Slug**: the end of the job's web address. It must be different from every other posting.
    - **Outlets**: every outlet hiring for this job. Applicants pick one. **Filter by City** ticks all outlets in a city for you.
    - **Baseline Panels (read-only)**: the interviewers of each ticked outlet. "No panel assigned yet" means nobody can interview for that outlet. Set it up first (see "Set up outlets, panels and approvers").
    - **Description**: the job advert applicants read.
    - **Is visible**: on means the job shows on the careers page.



5. Set the scores and tests:
    - **Auto-Shortlist Min Percentage** (75% unless you change it): applications at or above this score are shortlisted at once and go on to the test and interview booking. Leave it empty to shortlist everyone by hand.
    - **Auto-Reject Below Percentage** (50%): applications below this score get a WhatsApp rejection after a wait (2 days by default). Applications in between

wait for you.

- **Salary Budget (RM / Month)**: applicants asking for more than this lose points. Leave it empty to leave salary out of the score.
- **Candidate Assessments**: tests a shortlisted applicant takes before picking an interview time. **DISC Behavioural Profile** is the built-in personality test and is added for you; remove it with the red bin. **External Test** needs your company's online test service. **Must pass to reach slot selection** blocks applicants who fail.
- **Additional Interviewers (optional)**: people added to every interview for this job, on top of the outlet's panel. Under **Required Interviewers**, tick those whose free time must match.



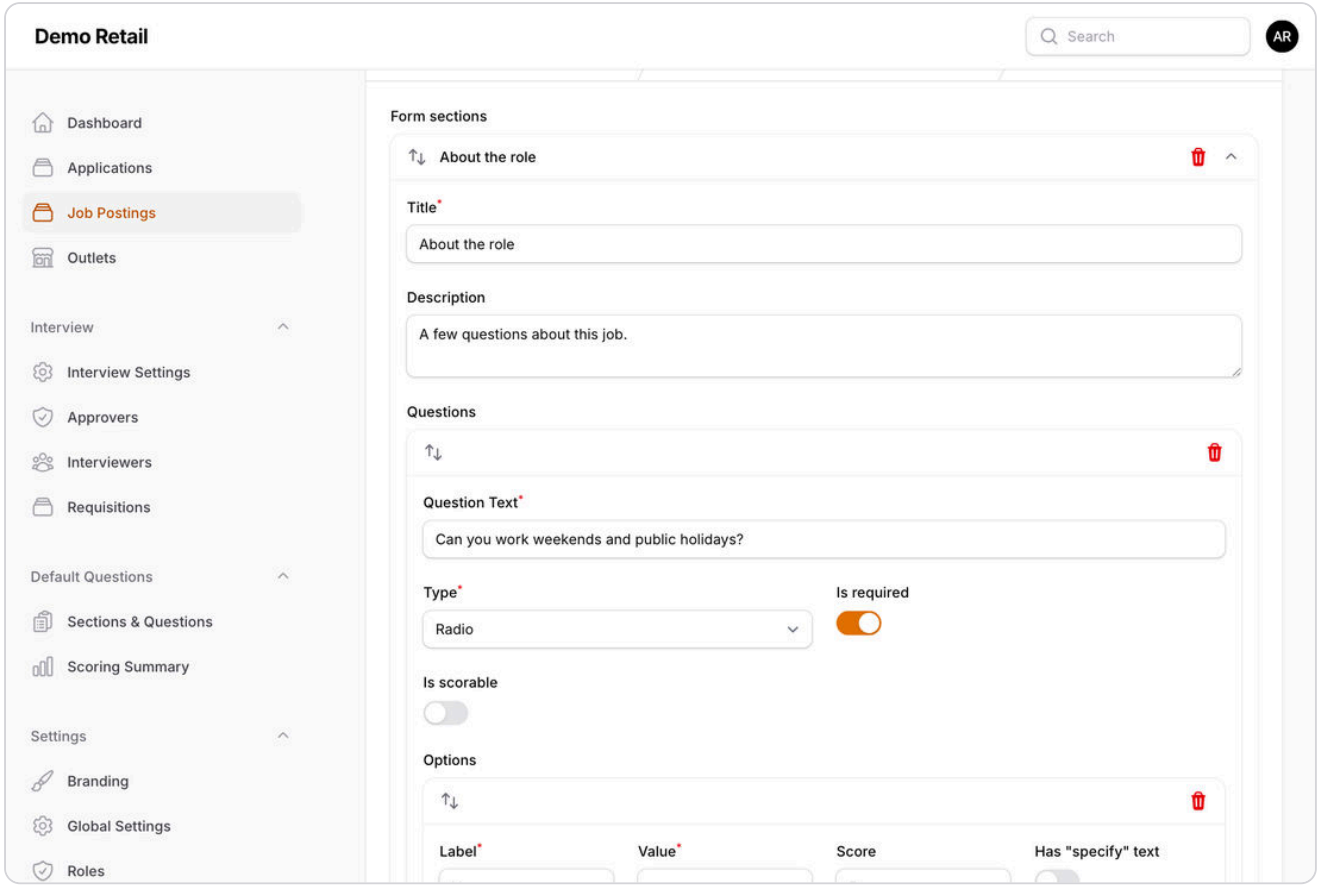
6. Press **Create**. The job is now on the careers page. There is no button to copy its link; its address is the careers page address followed by **/apply/** and the slug.

Opening a posting does not change the request's status, and one request can be used for more than one posting.

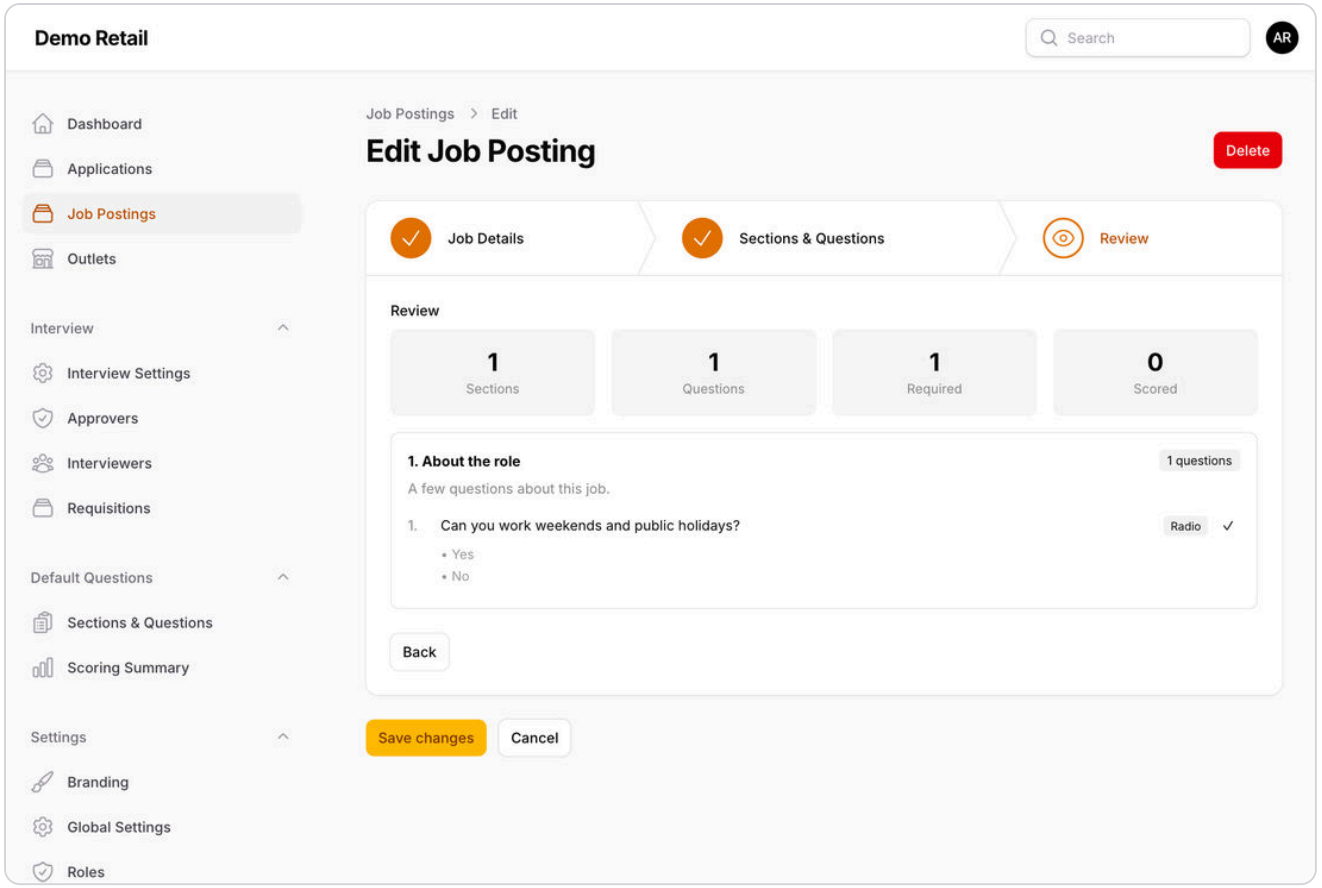
Add questions for this job only

Every job uses your company's standard form (see "Settings, roles and the application form"). To add questions for one job:

1. In **Job Postings**, press **Edit** on the job, then the **Sections & Questions** step at the top.
2. Press **Add Section**. Type a **Title** and **Description**.
3. Press **Add Question**. Type the **Question Text** and choose a **Type** (for example **Radio** for one choice from a list). Switch on **Is required** if it must be answered, and **Is scorable** if the answer should count towards the score.
4. For a list of choices, press **Add Option** for each one: **Label** (what the applicant sees), **Value** (a short code) and **Score** (points for that choice).



5. Press **Save changes**. Press **Save changes** before you look at the **Review** step: until you do, Review shows "No sections yet".



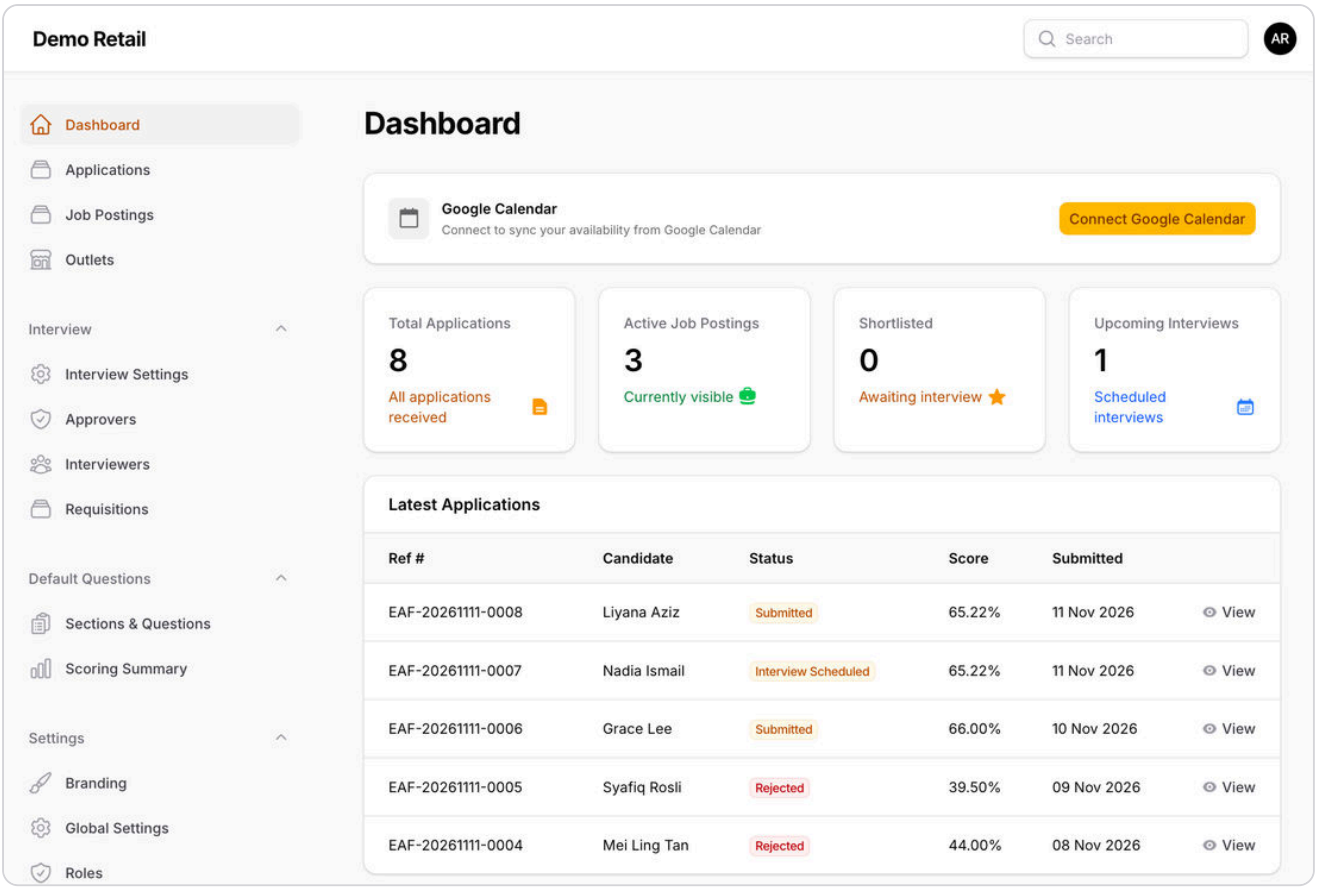
To take a job off the careers page, edit it, switch off **Is visible** and press **Save changes**.

RECRUITMENT

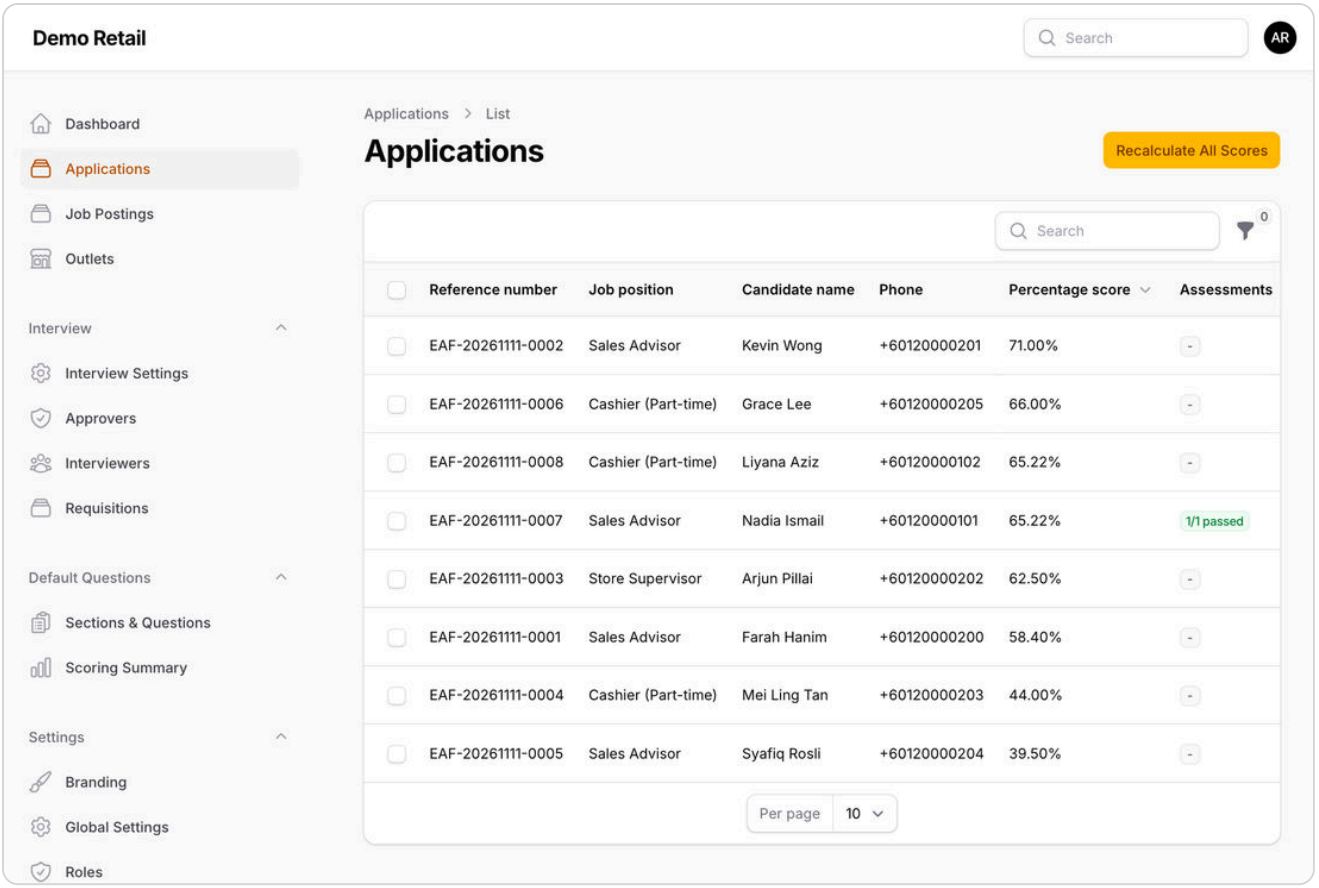
Review applications and shortlist

For: HR

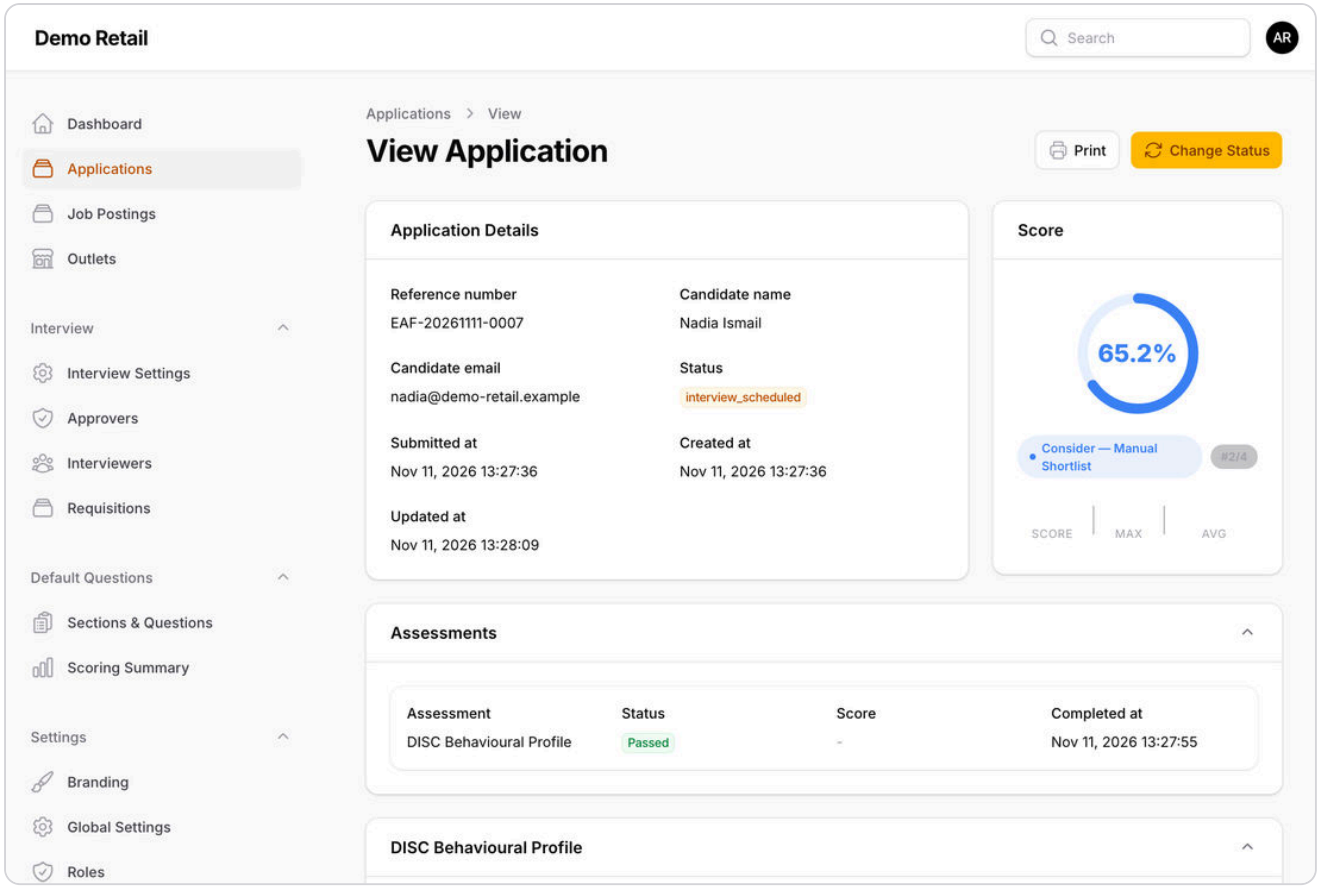
1. After you sign in, **Dashboard** shows **Total Applications**, **Active Job Postings**, **Shortlisted**, **Upcoming Interviews** and the **Latest Applications**. Press **View** on a row to open it.



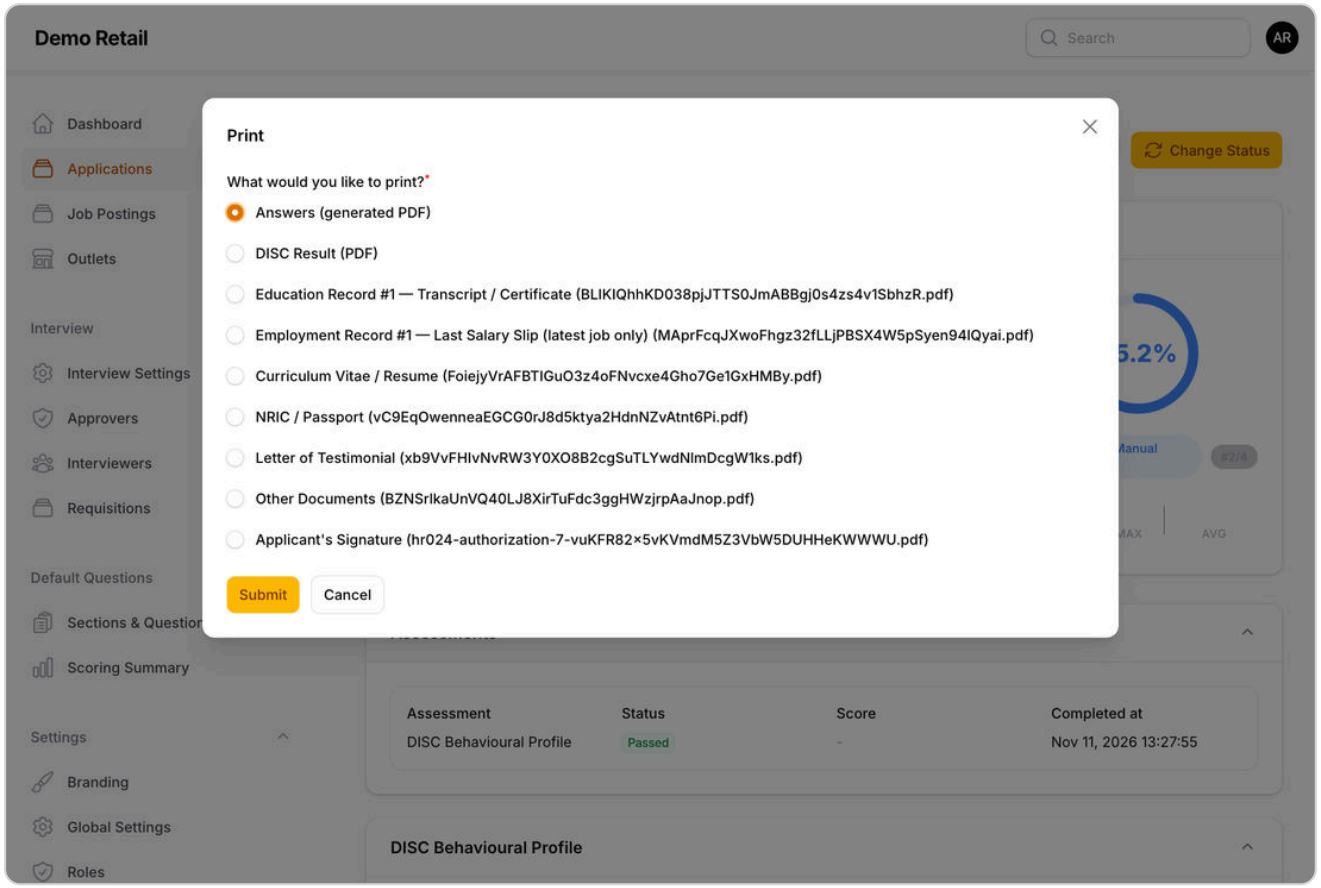
2. Press **Applications** in the menu for the full list. It is sorted by score, highest first. The **Assessments** column shows how many tests were passed. Press the funnel to filter by status or by **Failed an assessment**.



3. Press a row, or **View**, to open the application:
    - **Application Details**: reference, name, email, status and dates.
    - **Score**: the percentage, and the rank among applicants for the same job (for example **#2/4**). The label under the score ("Strong — Auto Shortlist", "Consider — Manual Shortlist", "Not Shortlisted") always uses 75% and 50%, not the percentages set on the job, so it can disagree with what happened.
    - **Assessments** and **DISC Behavioural Profile**: test results, if the job has a test.
    - **Answers**: every answer, with the points it earned. Press a file name to download it.

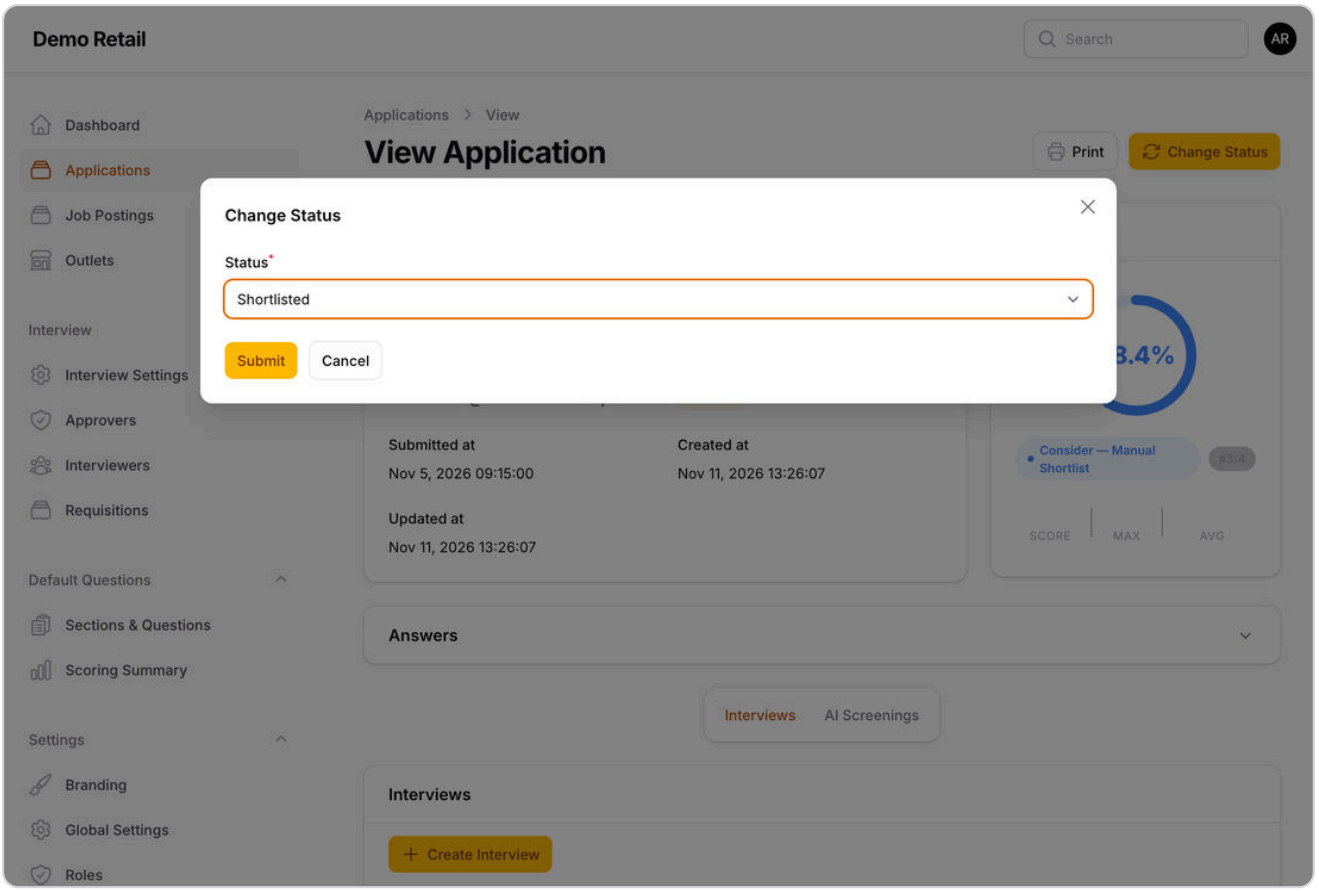


4. To print, press **Print** at the top and choose **Answers (generated PDF)**, **DISC Result (PDF)** or one of the uploaded files, then **Submit**. It opens in a new tab; use your browser's Print there.



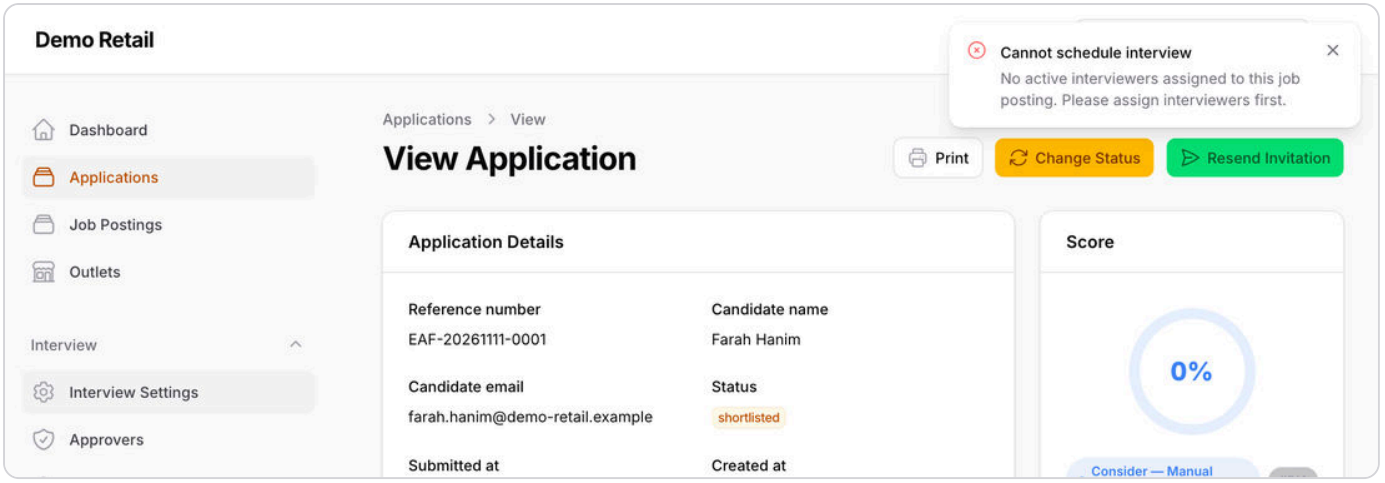
Shortlist or reject by hand

1. On the application, press **Change Status**.
2. Choose **Shortlisted**, **Rejected** or **Archived** (hidden from the usual lists) and press **Submit**.



- **Shortlisted** sends the applicant a WhatsApp link to take the test (if any) and book an interview.
- **Rejected** sends the applicant nothing. Tell them yourself.

If you see **Cannot schedule interview**, the applicant's outlet has no interviewers. The status still changes to Shortlisted, but no link was sent. Give the outlet an interview panel (see "Set up outlets, panels and approvers"), come back and press the green **Resend Invitation** at the top once.



To send the link again after that (for example because it expired), use **Resend Invitation** in the **Interviews** part further down instead (see "Manage interviews from the admin screens"). Pressing the green button at the top a second time fails without a message.

RECRUITMENT

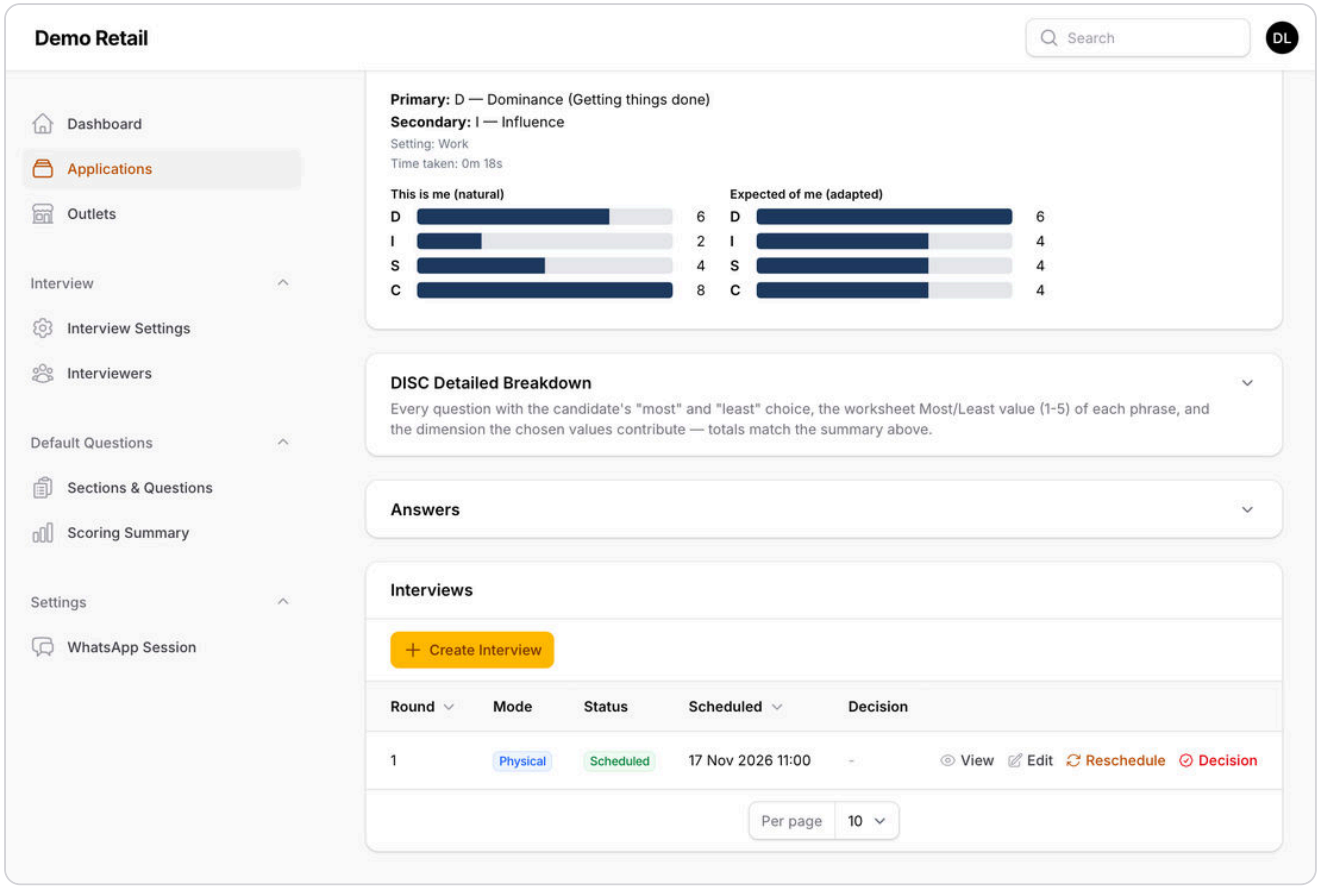
Give interview feedback

For: Interviewers

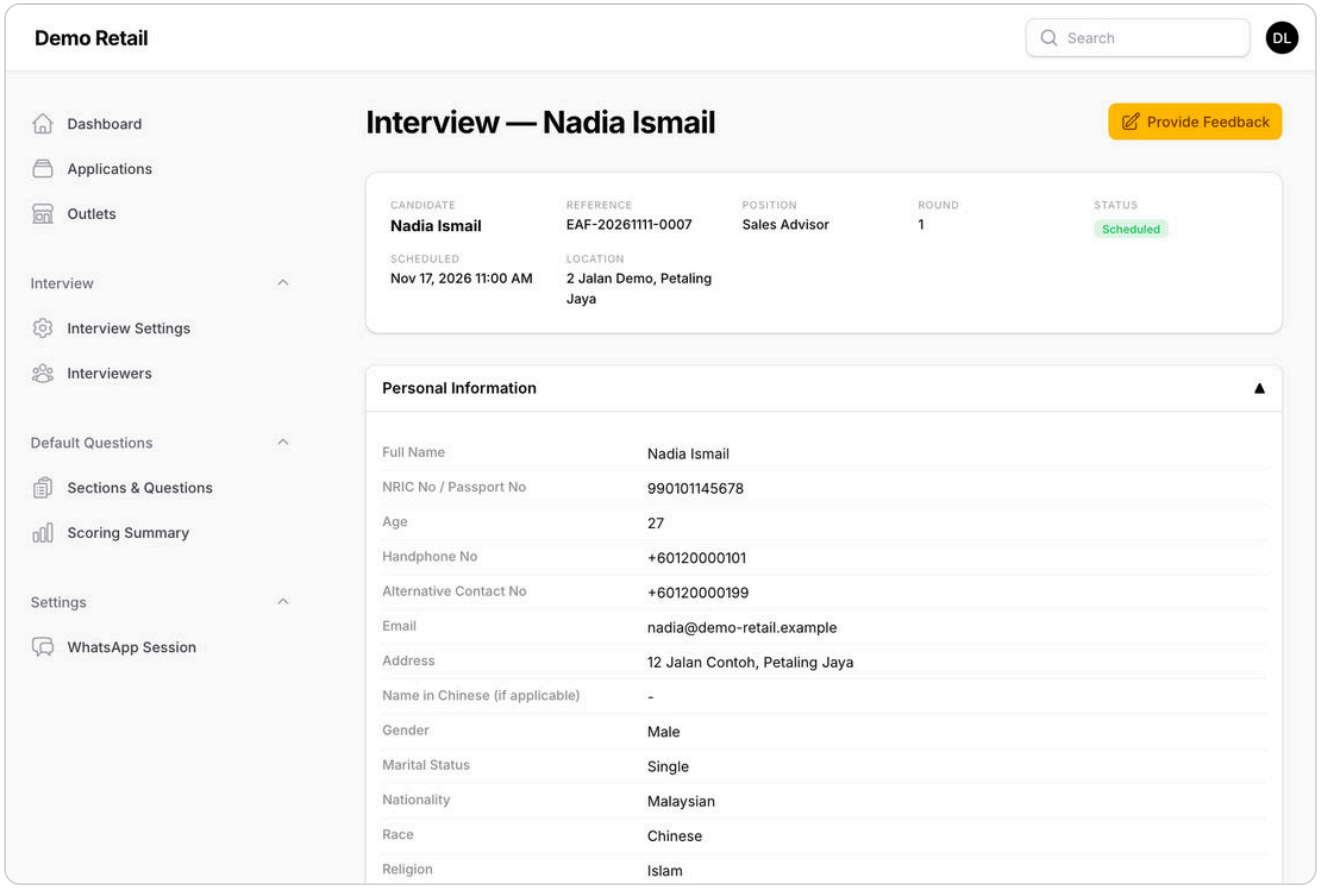
When an applicant books, every interviewer on the panel gets a WhatsApp message with the name, job, date and time. The message has no link: you give feedback in the admin screens.

You need an account with your phone number, and a role that can open applications and their interviews. With the **Hr Reviewer** role alone, the **Interviews** part does not show. Ask HR.

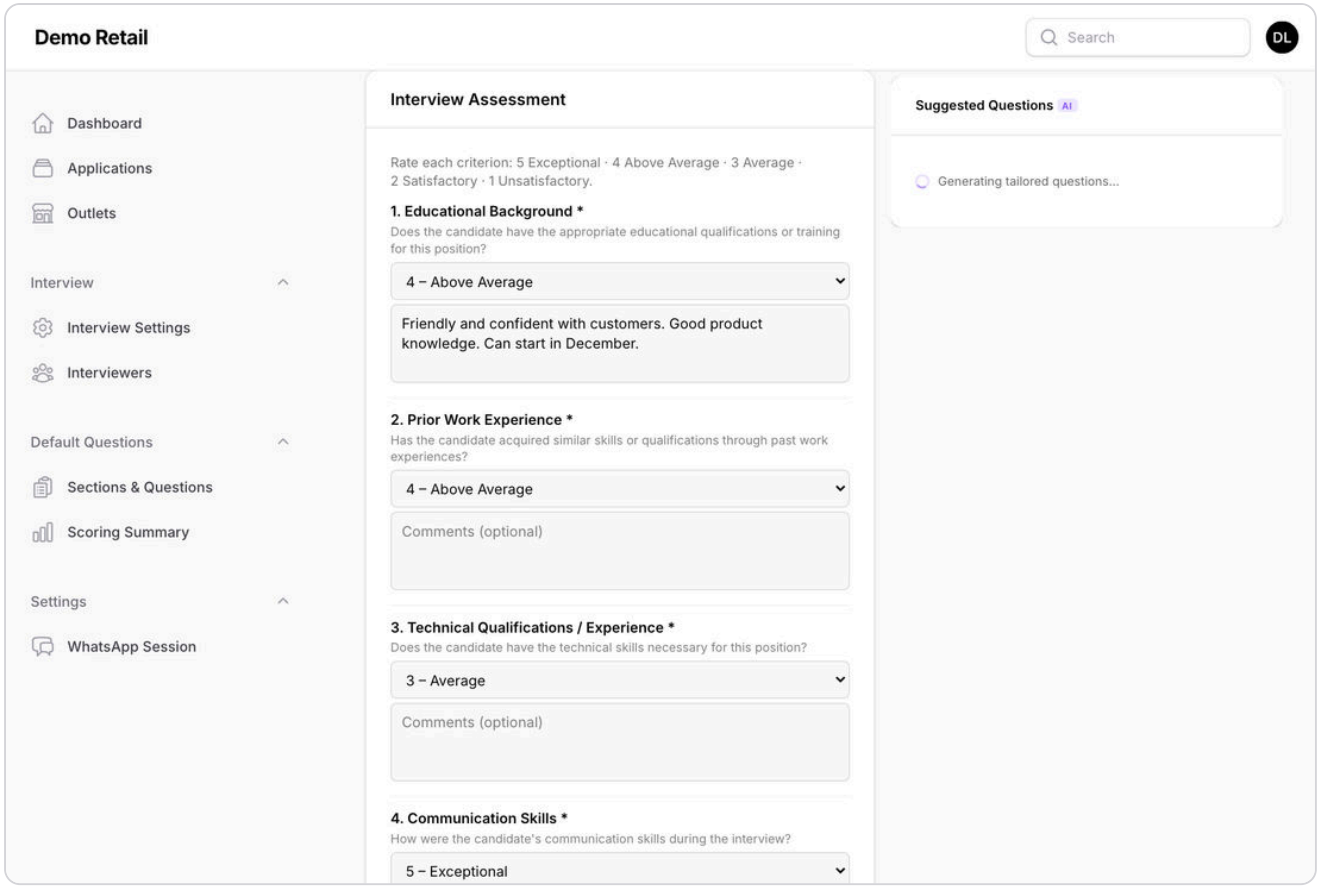
1. Sign in to the admin screens (the Recruitment web address with **/admin** at the end). Press **Applications**, then **View** on the applicant.
2. Scroll to the bottom. Under **Interviews**, press **View** on the interview.



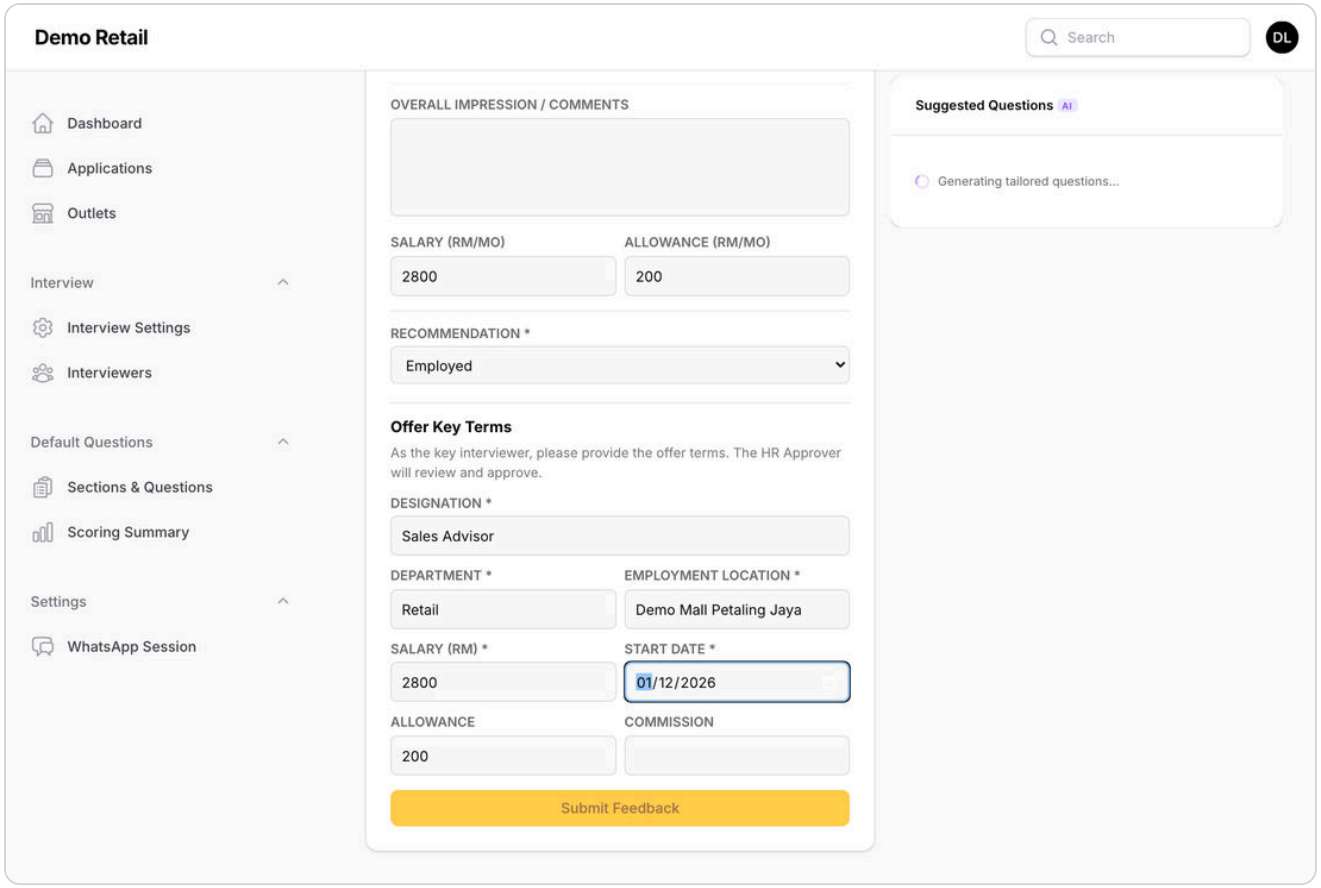
3. **Interview — (name)** shows the interview details and all the applicant's answers, section by section. Read them before or during the interview. Press **Provide Feedback** at the top right; it opens in a new tab. The button shows only if you are on this interview's panel and have not given feedback yet.



4. Under **Interview Assessment**, give each of the 10 points a score from 5 (Exceptional) to 1 (Unsatisfactory): Educational Background, Prior Work Experience, Technical Qualifications / Experience, Communication Skills, Candidate Interest, Knowledge of Organization, Teambuilding / Interpersonal Skills, Initiative, Time Management and Customer Service. The comment box under each is optional.

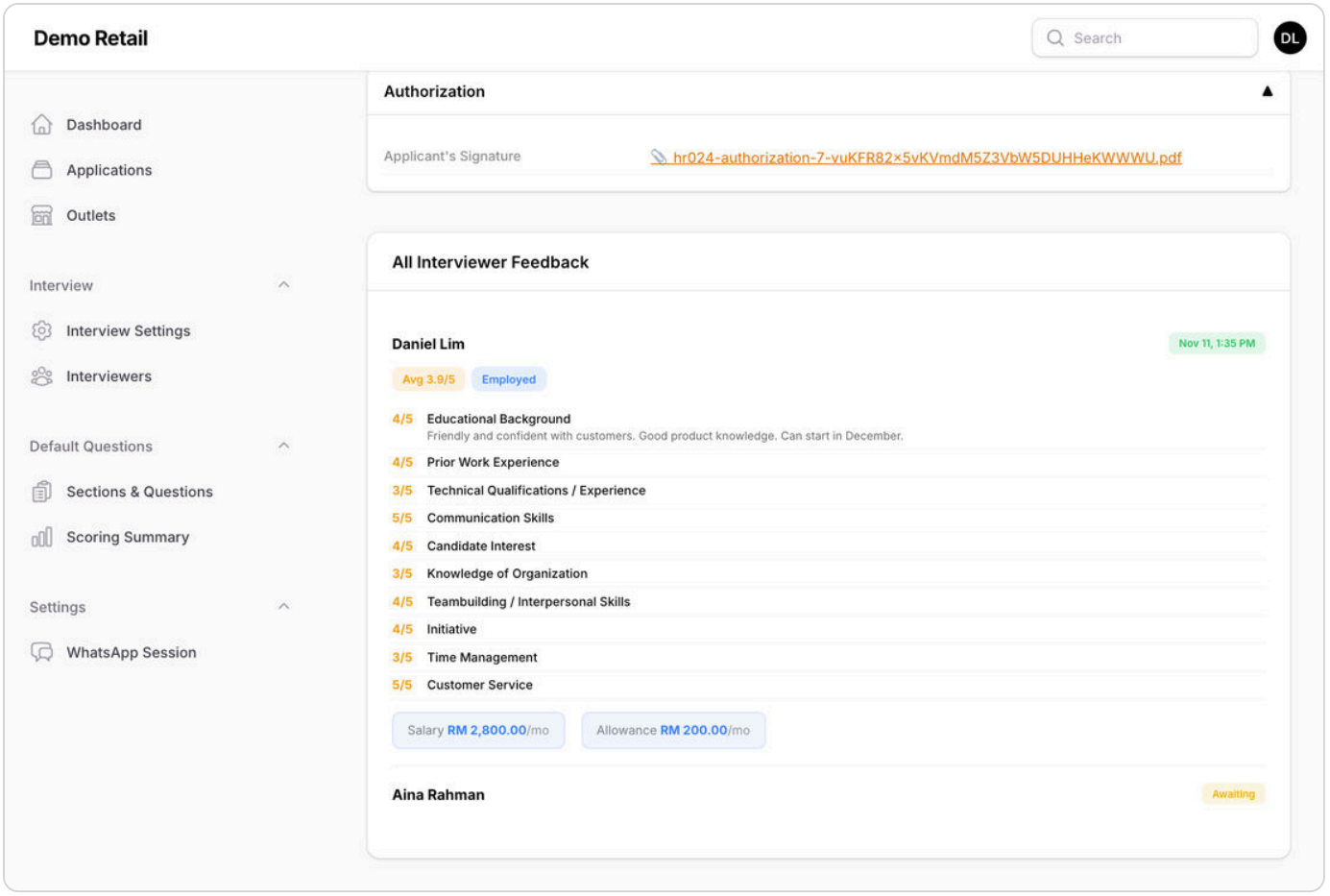


5. Fill in **OVERALL IMPRESSION / COMMENTS**, and the **SALARY (RM/MO)** and **ALLOWANCE (RM/MO)** you think are right.
6. **If you are the key interviewer** (the decision-maker for the outlet), you also choose a **RECOMMENDATION**: **Employed**, **Keep in List of Review**, **Arrange 2nd Interview** or **Rejected**.
    - For **Rejected**, pick the reasons under **REASON FOR REJECTION**.
    - For **Employed**, fill in **Offer Key Terms**: **DESIGNATION**, **DEPARTMENT**, **EMPLOYMENT LOCATION**, **SALARY (RM)**, **START DATE**, and if needed **ALLOWANCE** and **COMMISSION**. These become the offer letter once an approver signs it.



7. Press **Submit Feedback**. A green message confirms the feedback was submitted. You cannot change it afterwards.

Back on the interview page, **All Interviewer Feedback** shows everyone's scores, the average, and who is still **Awaiting**.



What happens next

When the key interviewer submits, the approvers of the outlet get a WhatsApp link to make the hiring decision (see "Make the hiring decision and approve the offer"). Feedback from the other interviewers is shown to them too.

Suggested Questions on the right lists interview questions written by AI from the applicant's answers. It needs an AI service set up by your administrator. Without one it keeps showing "Generating tailored questions...".

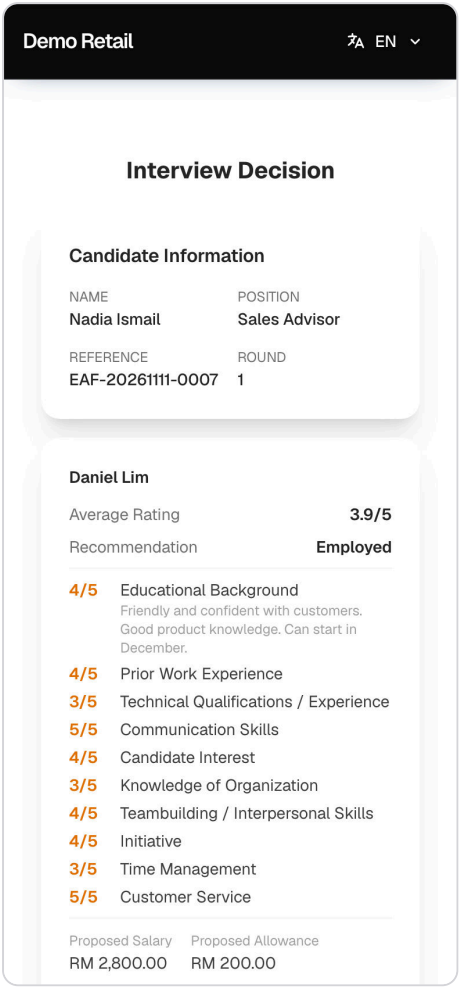
RECRUITMENT

Make the hiring decision and approve the offer

For: Approvers

When the key interviewer submits feedback, every approver of that outlet gets a WhatsApp message with the candidate, the job, the recommendation and a link. The link works for 7 days. You do not need to sign in.

Press the link. **Interview Decision** shows **Candidate Information** and each interviewer's scores, comments and proposed salary.



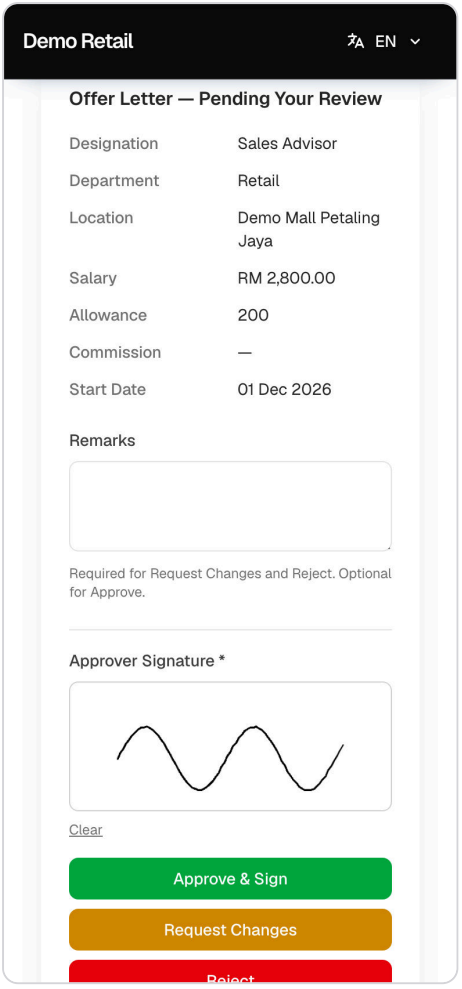
What you see below depends on the key interviewer's recommendation.

When the recommendation is Employed: approve the offer

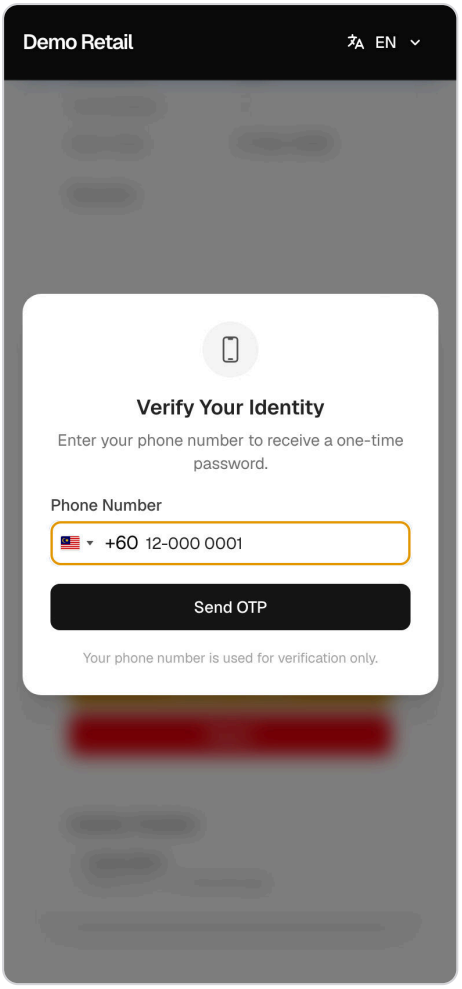
1. Under **Offer Letter — Pending Your Review**, check the **Designation**, **Department**, **Location**, **Salary**, **Allowance**, **Commission** and **Start Date**.
2. Type a note under **Remarks** if you want to. It is required for **Request Changes** and **Reject**.

3. Sign in the **Approver Signature** box with your finger. Press **Clear** to sign again.

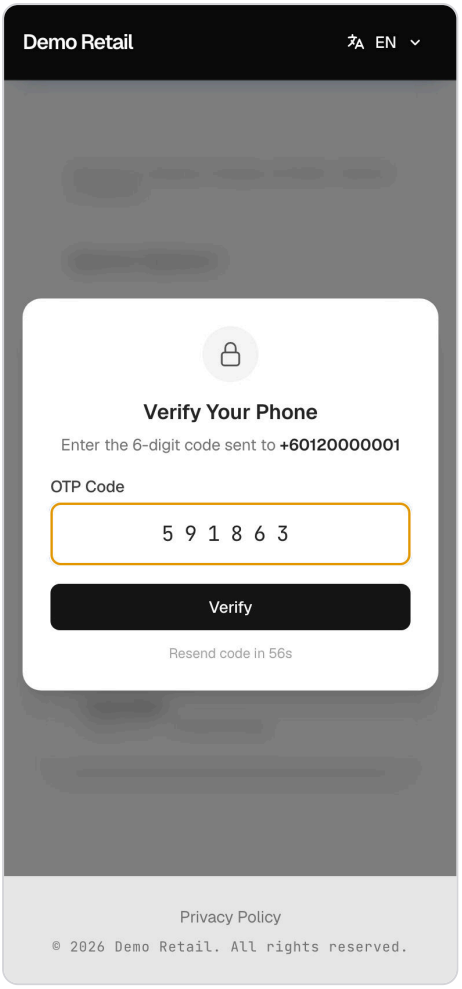
4. Press **Approve & Sign**, **Request Changes** or **Reject**.



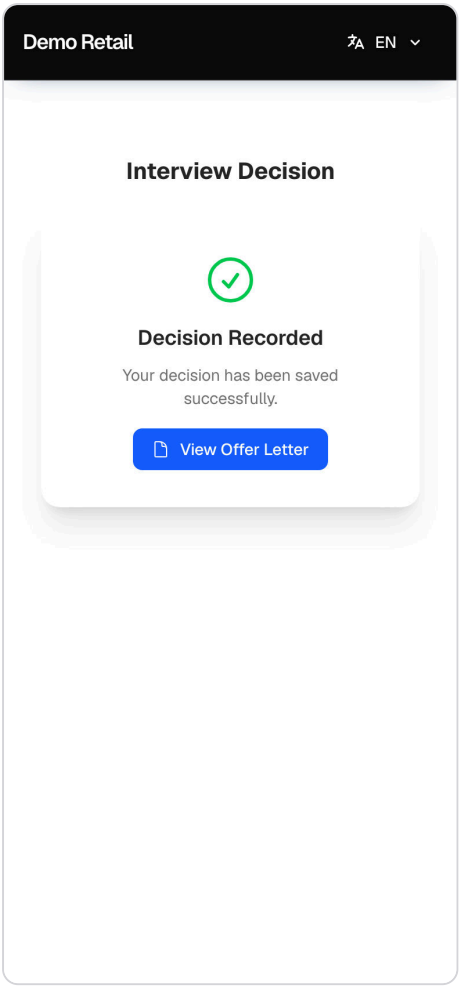
5. **Verify Your Identity**: your phone number is filled in. Press **Send OTP**, then choose **SMS** or **WhatsApp**.



6. Type the 6-digit code under **OTP Code** and press **Verify**.



7. **Decision Recorded** appears. After an approval, press **View Offer Letter** to see the letter.



What each button does:

- **Approve & Sign**: the offer letter is made with your signature. The applicant gets it on WhatsApp, and the interviewers and approvers are told.
- **Reject**: the applicant gets a WhatsApp message saying they were not selected. The interviewers and approvers are told.
- **Request Changes**: sends your remarks to the job's key interviewer. Today there is no screen where they can change the terms and send them back, so ask HR how to go on before you use it.

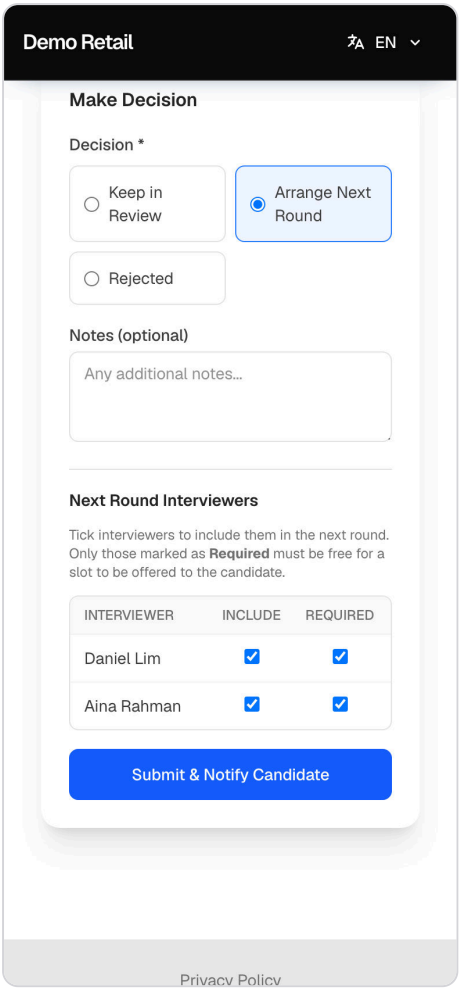
The wording of the offer letter is built into the app. Ask your administrator to check it before your first offer.

Other recommendations: make the decision

If the recommendation is **Keep in List of Review**, **Arrange 2nd Interview** or **Rejected**, you see **Make Decision** instead.

1. Under **Decision**, choose **Keep in Review**, **Arrange Next Round** or **Rejected**. Add **Notes (optional)**.

2. For **Arrange Next Round**, tick who should interview next under **Next Round Interviewers**: **Include** to invite them, **Required** if their free time must match.
3. Press **Submit Decision**, or **Submit & Notify Candidate** for a next round.



Only **Arrange Next Round** sends the applicant a message (a new booking link). For **Rejected** and **Keep in Review**, nothing is sent; HR tells the applicant. No phone code is asked on this screen.

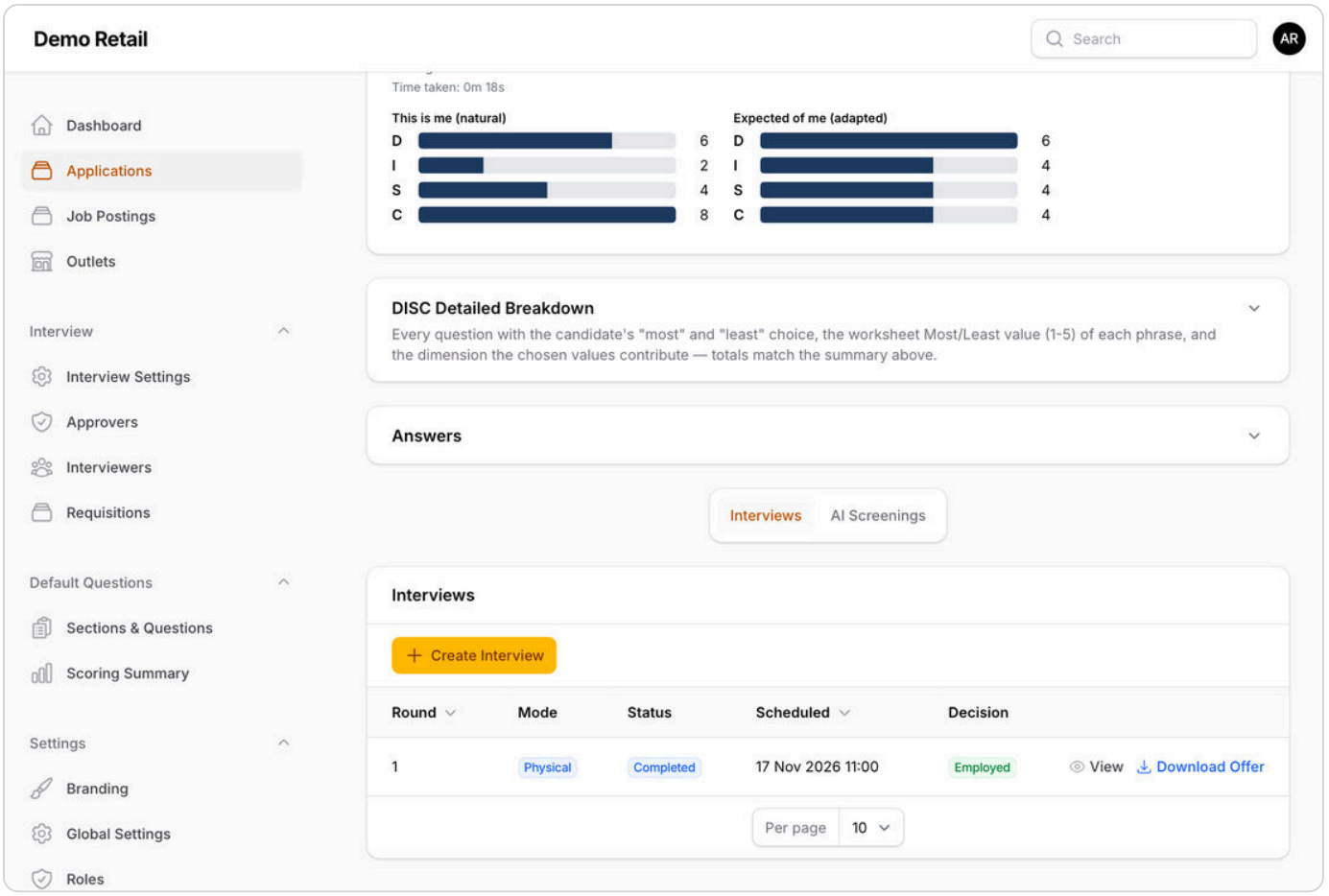
If the link says **Link Expired**, ask HR: they can record the decision from the admin screens.

RECRUITMENT

Manage interviews from the admin screens

For: HR

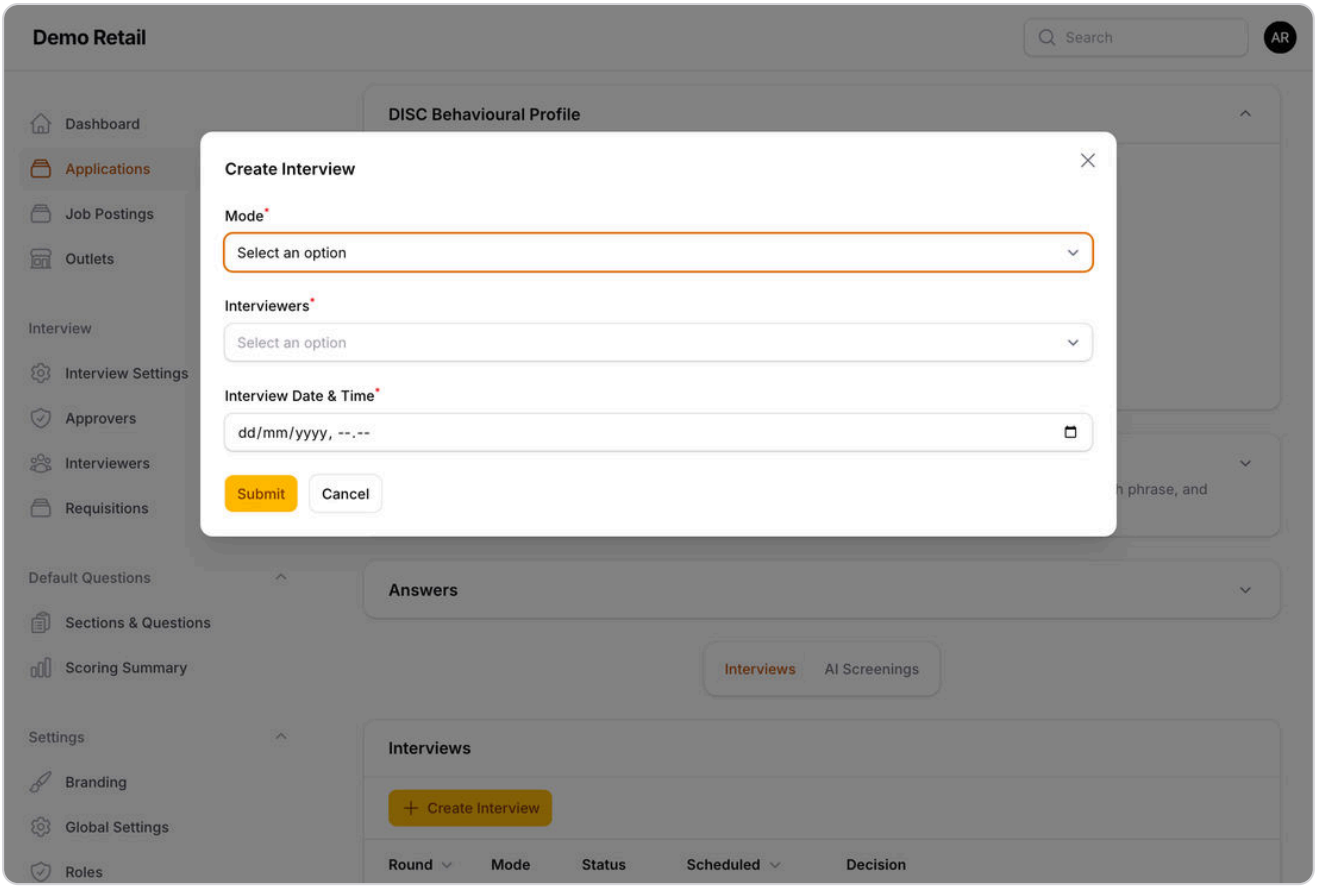
Each application has an **Interviews** part at the bottom of its page. It lists every round with its **Mode** (Physical or Online), **Status**, time and **Decision**.



Book an interview yourself

Use this when you agree a time with the applicant by phone.

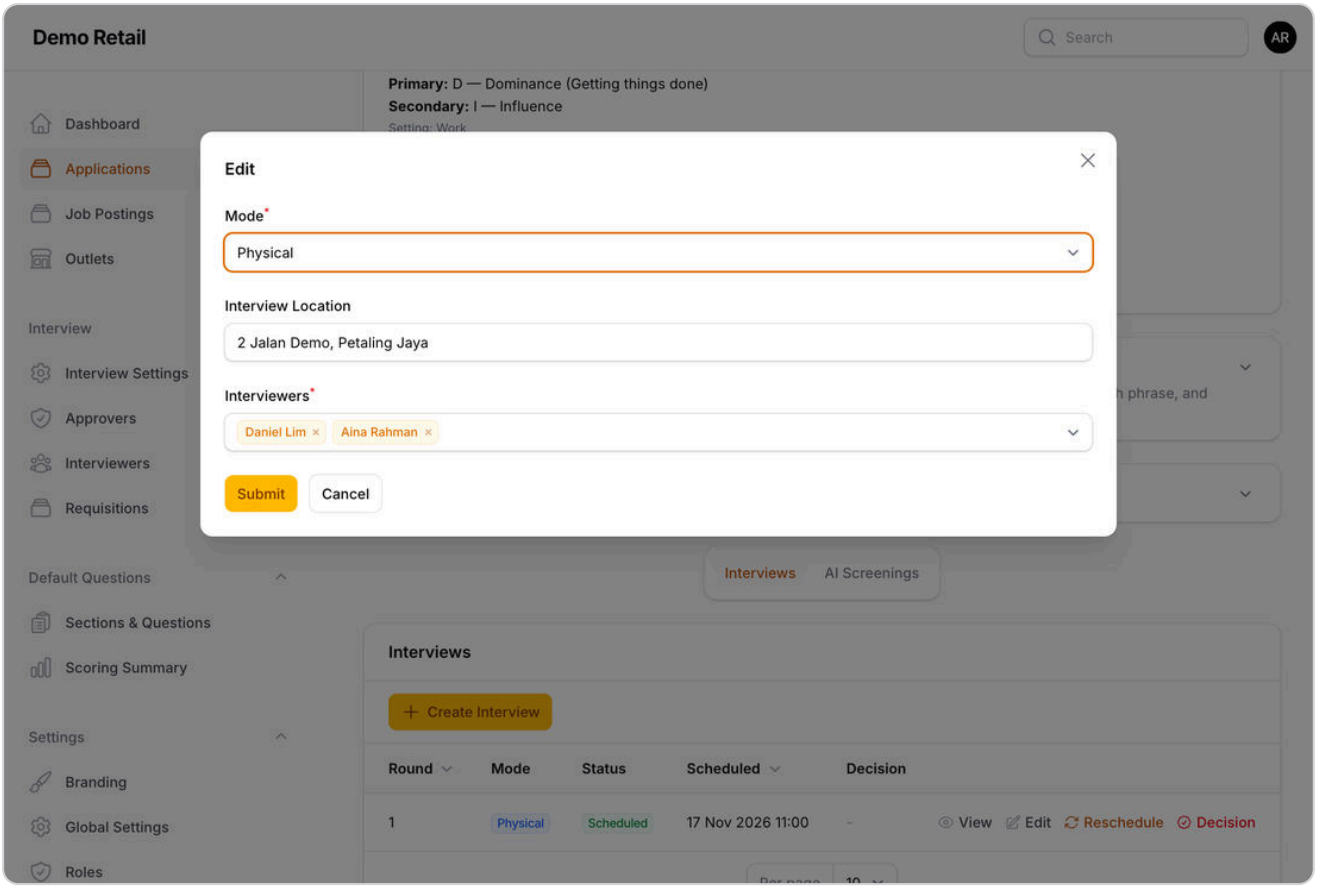
1. Press **Create Interview**.
2. Choose the **Mode**, the **Interviewers** and the **Interview Date & Time**, then press **Submit**.



The applicant is **not** messaged. Tell them the time and place yourself.

Change an interview

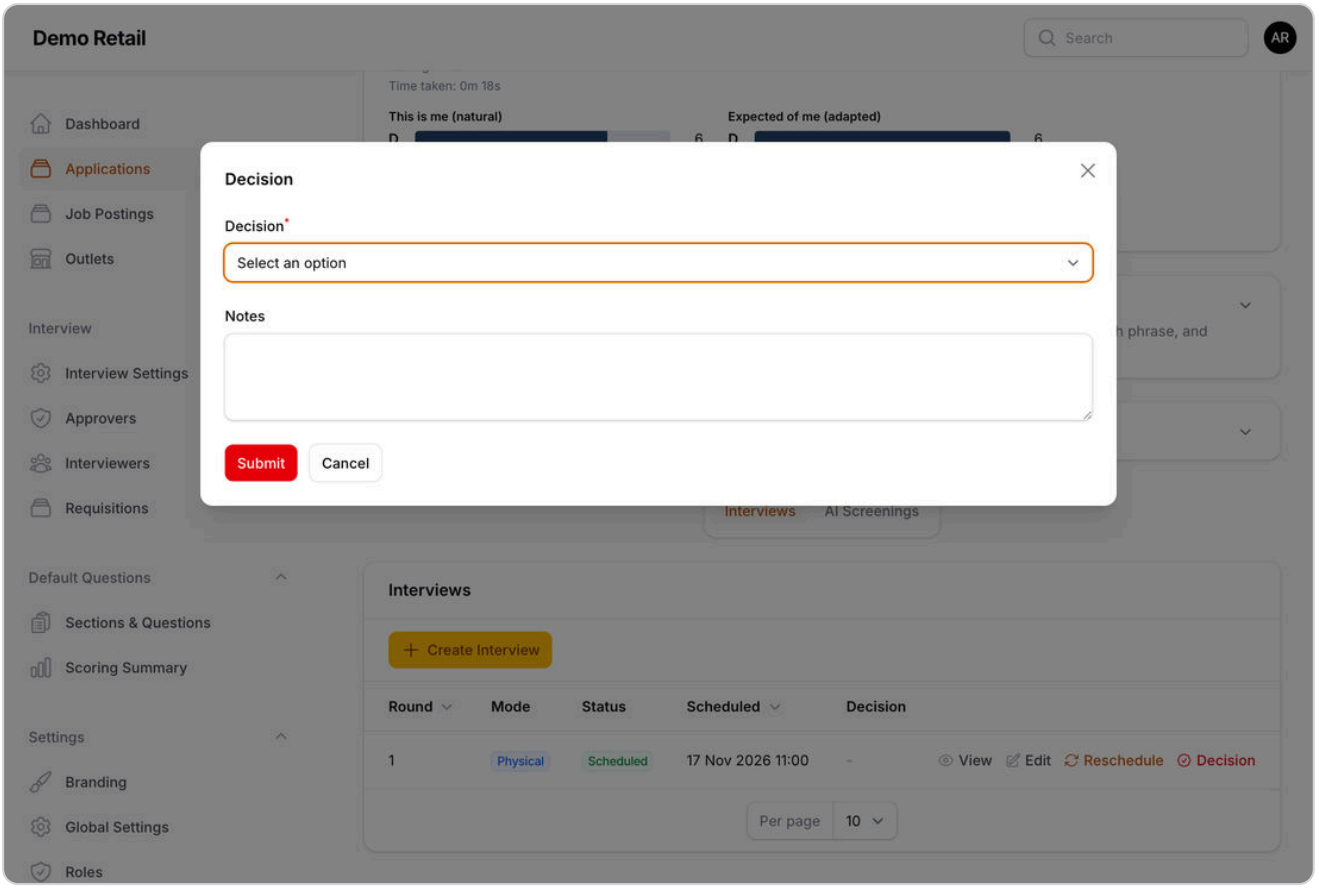
- **Edit**: change the **Mode**, the **Interview Location** (or the meeting link for an online interview) and the **Interviewers**.



- **Reschedule**: cancels the booked time and sends the applicant a new WhatsApp link to pick another one.
- **Resend Invitation** (above the list): sends the booking link again with a new expiry date. Choose the phone number under **Send to phone number** and press **Submit**.

Record a decision without the approver link

1. Press **Decision** on the interview.
2. Choose a decision and add **Notes**, then press **Submit**. The list shows the choices as **Employed**, **KeepInReview**, **NextRound** and **Rejected**.



- **Employed** marks the application **Offered**. **Rejected** marks it **Rejected**. Neither sends the applicant a message.
- **NextRound** asks for the **Next Round Interviewers** and sends the applicant a new booking link.
- After **Employed**, an **Offer** button appears. Do not use it today: after **Submit** the box stays open with no message, because an offer needs an approver's signature, and a half-made offer is left behind. Offers work from the approver's decision page (see "Make the hiring decision and approve the offer").

Once an offer is approved, press **Download Offer** here, or **Download Offer Letter** at the top of the application, to get the PDF.

AI Screenings

The **AI Screenings** tab next to **Interviews** starts a WhatsApp chat between an AI and the applicant, which ends in a score out of 100. It needs an AI service and a connected **WhatsApp Session** (see "Settings, roles and the application form"). Without them it shows "WhatsApp Not Connected".

RECRUITMENT

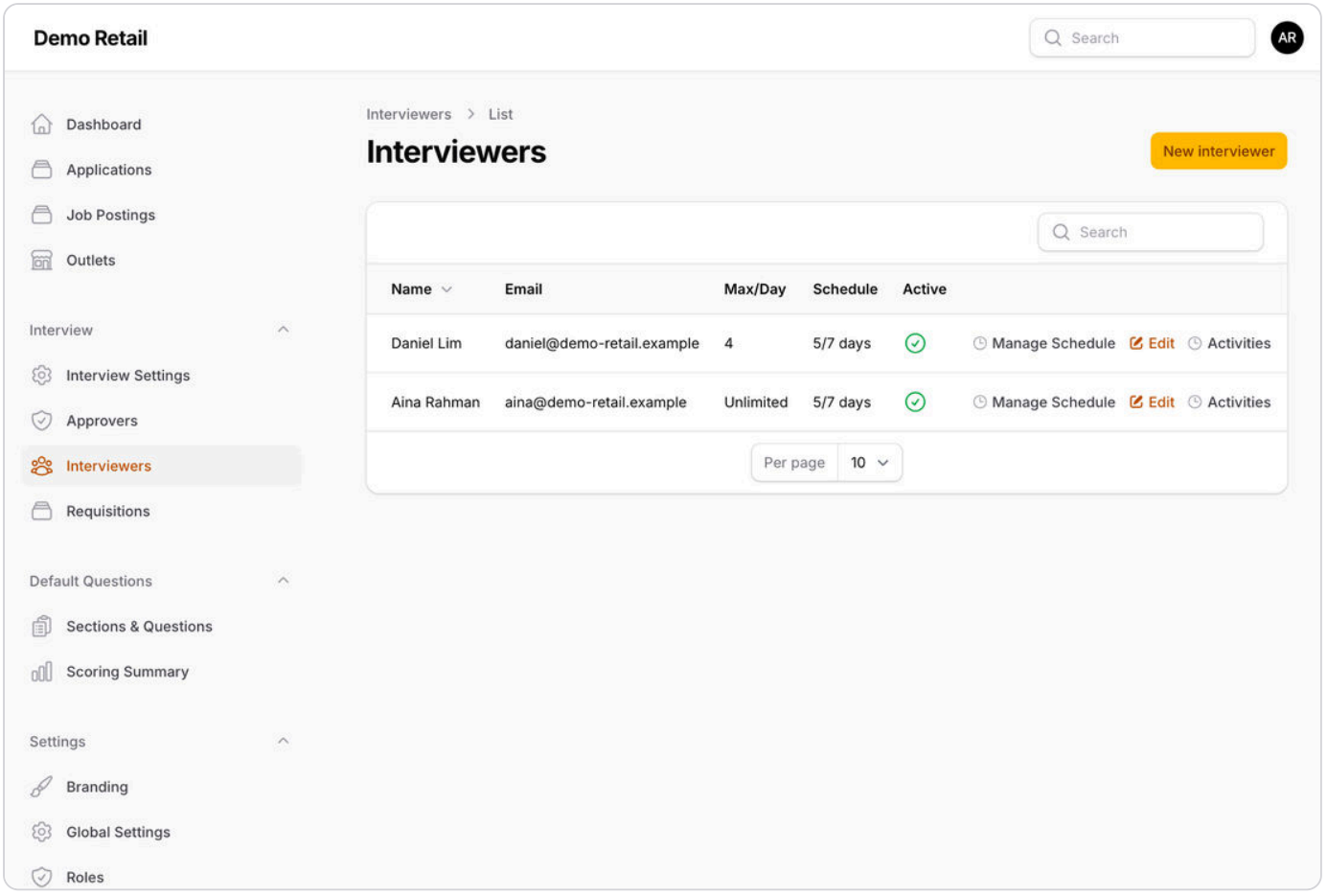
Set interviewer availability

For: Administrators

Applicants can only pick times when every required interviewer is free. Each interviewer's free time comes from a weekly schedule typed into the app, or from their Google Calendar.

Add an interviewer

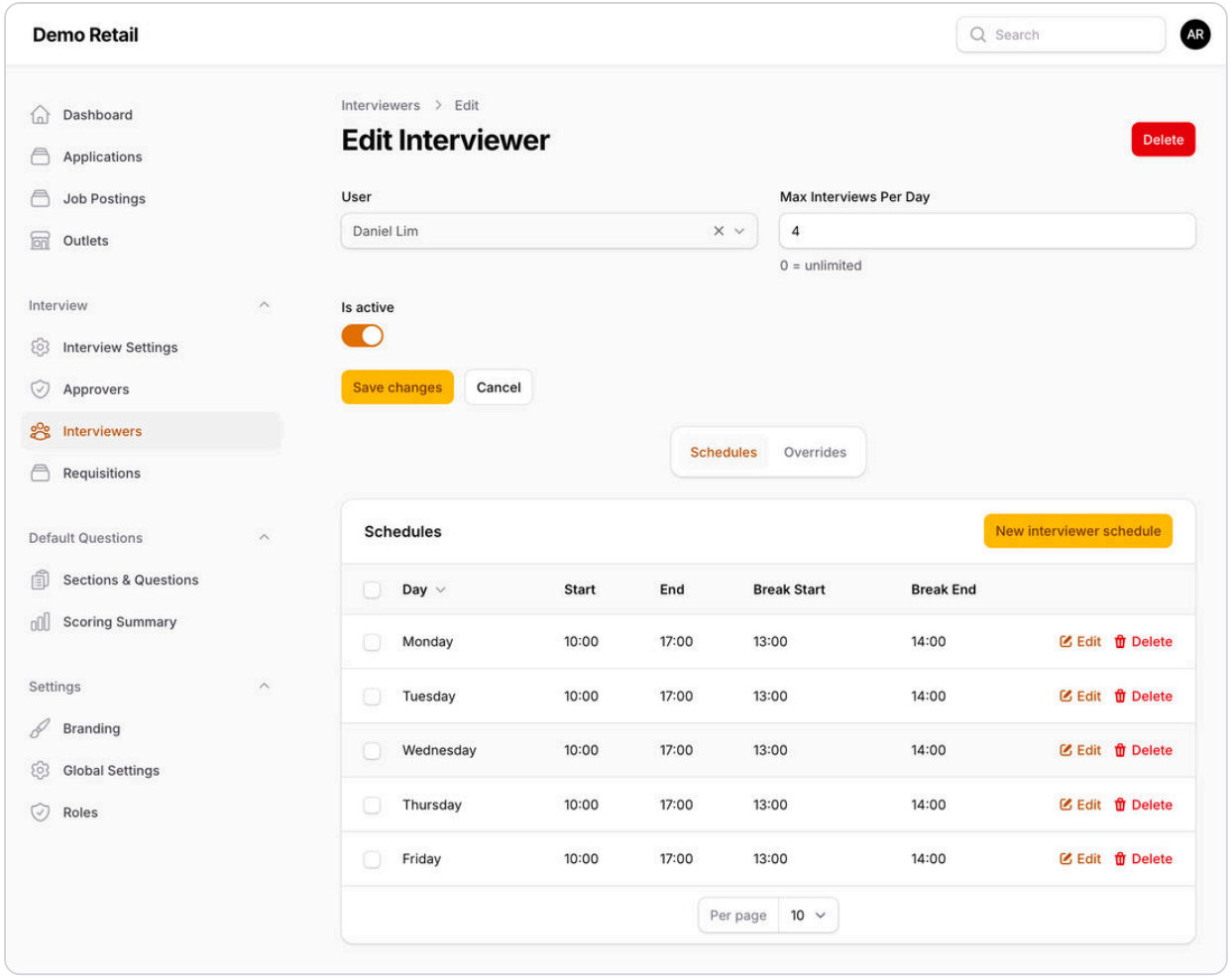
1. Under **Interview**, press **Interviewers**, then **New interviewer**.
2. Pick the **User** (the person needs an account first), set **Max Interviews Per Day** (0 = unlimited) and leave **Is active** on. Press **Create**.



Weekly schedule

1. Press **Manage Schedule** on the interviewer.
2. On the **Schedules** tab, press **New interviewer schedule** for each working day: the day, **Start** and **End** time, and the lunch break (**Break Start**, **Break End**). No

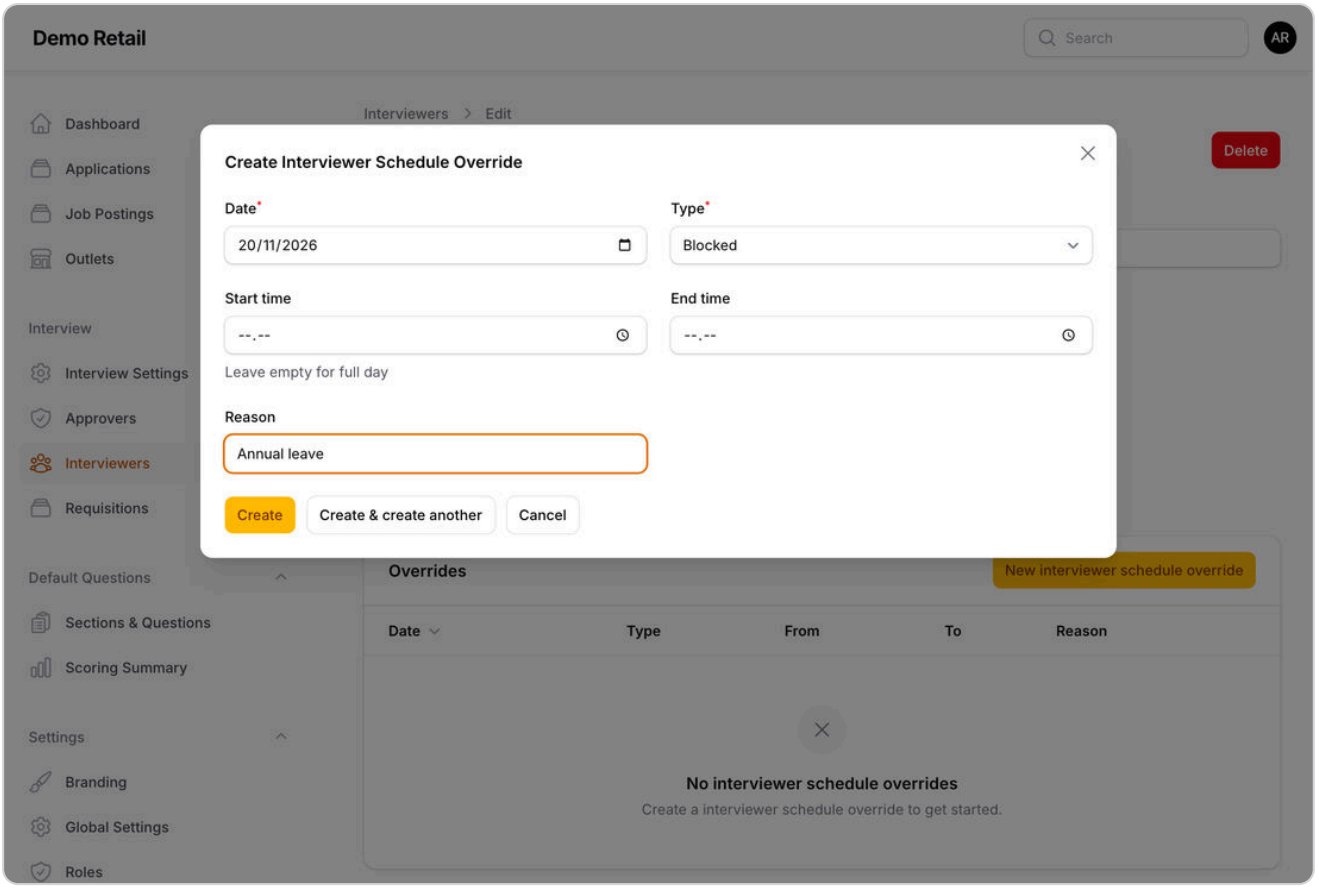
interview is offered during the break.



An interviewer with no schedule at all is treated as free on weekdays from 9:00 AM to 5:00 PM, except 12:00 to 1:00 PM.

Leave and one-off changes

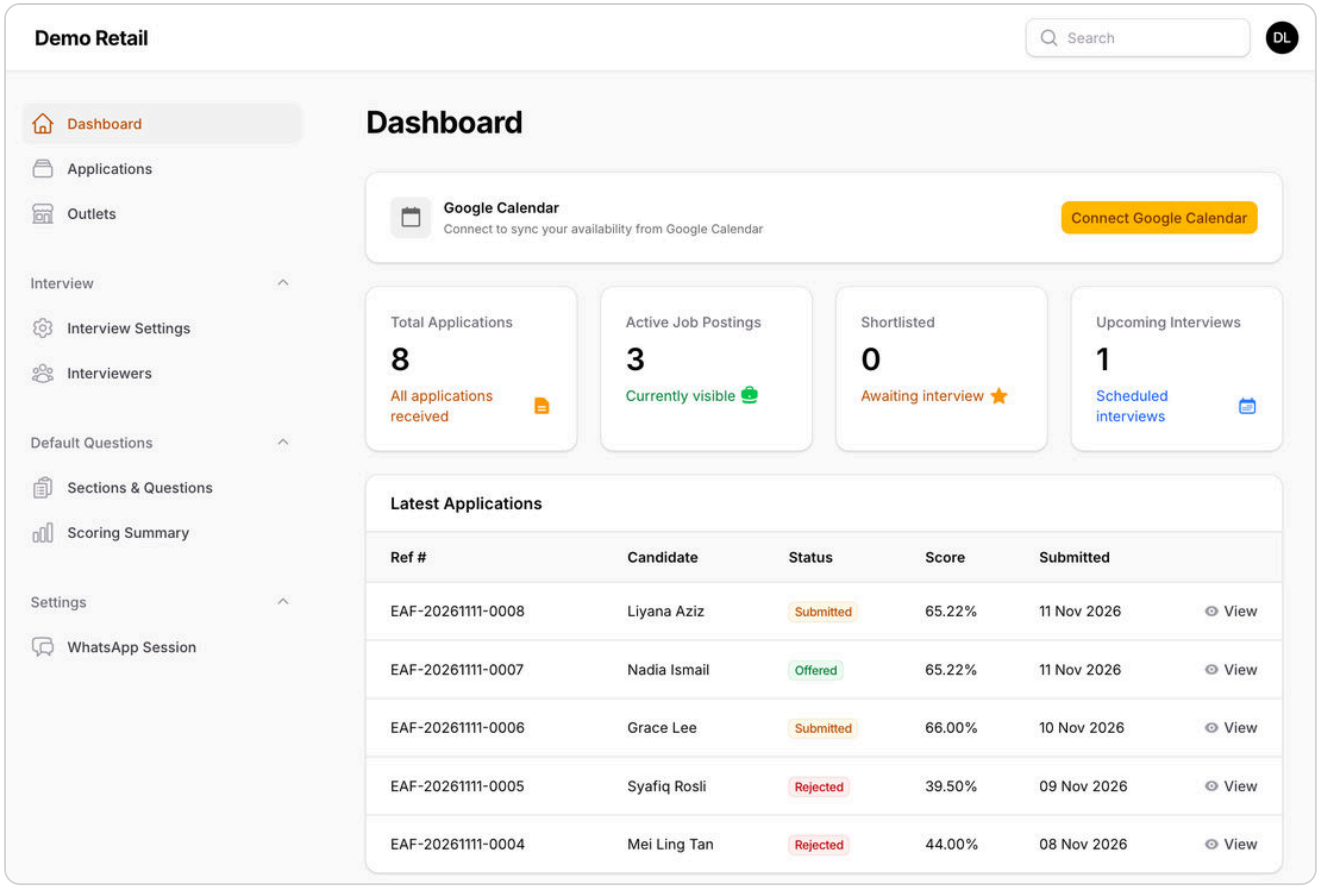
1. On the same page, open the **Overrides** tab and press **New interviewer schedule override**.
2. Pick the **Date** and the **Type**: **Blocked** (not available) or **Available** (extra hours, for example on a Saturday).
3. Leave **Start time** and **End time** empty for the whole day. Add a **Reason** and press **Create**.



Google Calendar instead

An interviewer can let the app read their Google Calendar. Your administrator must set up the Google connection first.

1. The interviewer signs in to the admin screens. **Dashboard** shows a **Google Calendar** box.
2. They press **Connect Google Calendar** and allow access in Google.



From then on, the app treats calendar events whose title contains the **Calendar Event Keyword** (set in **Interview Settings**) as the times they can interview. The weekly schedule no longer applies to them. They can switch back with **Disable** or **Disconnect** in the same box.

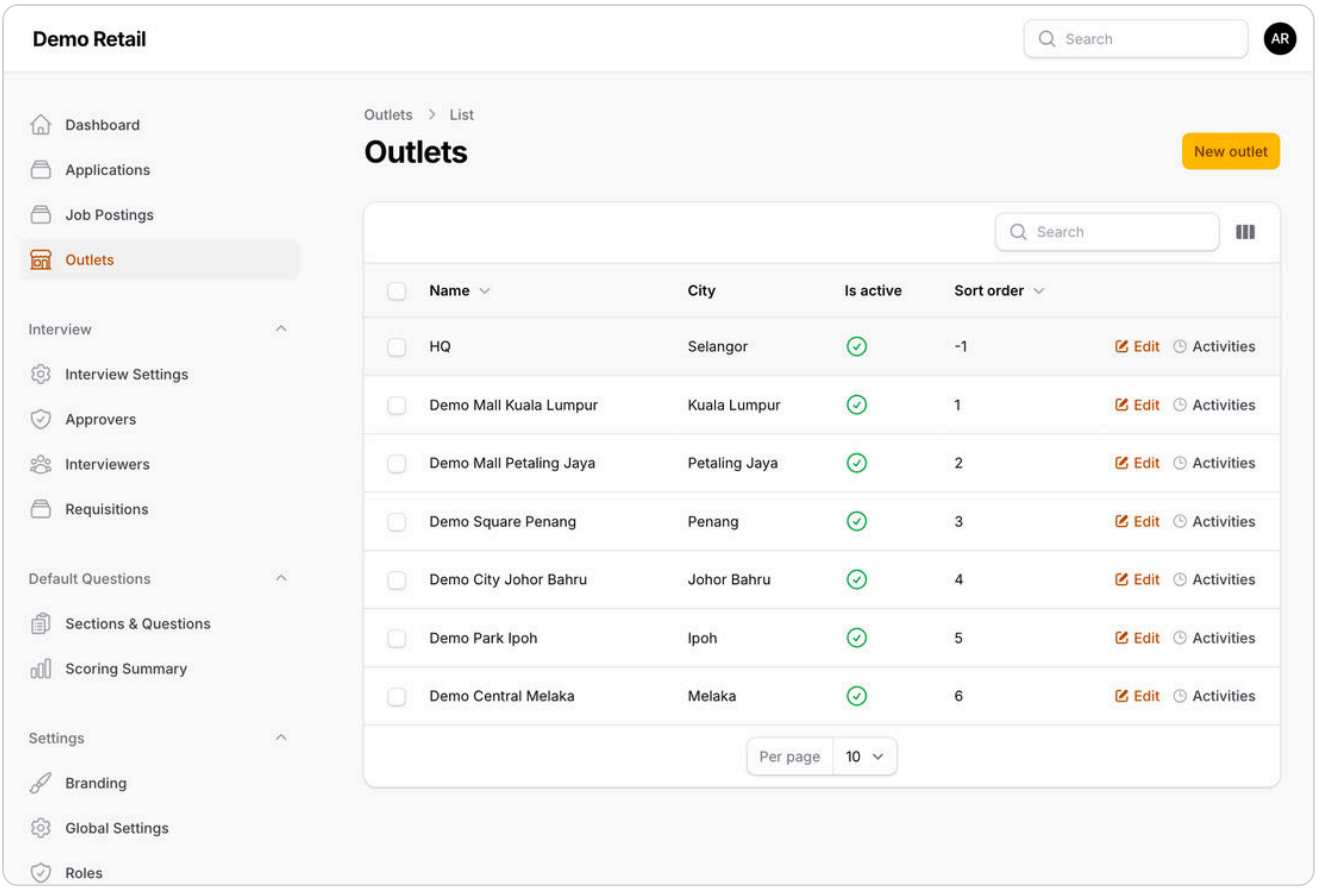
RECRUITMENT

Set up outlets, panels and approvers

For: Administrators

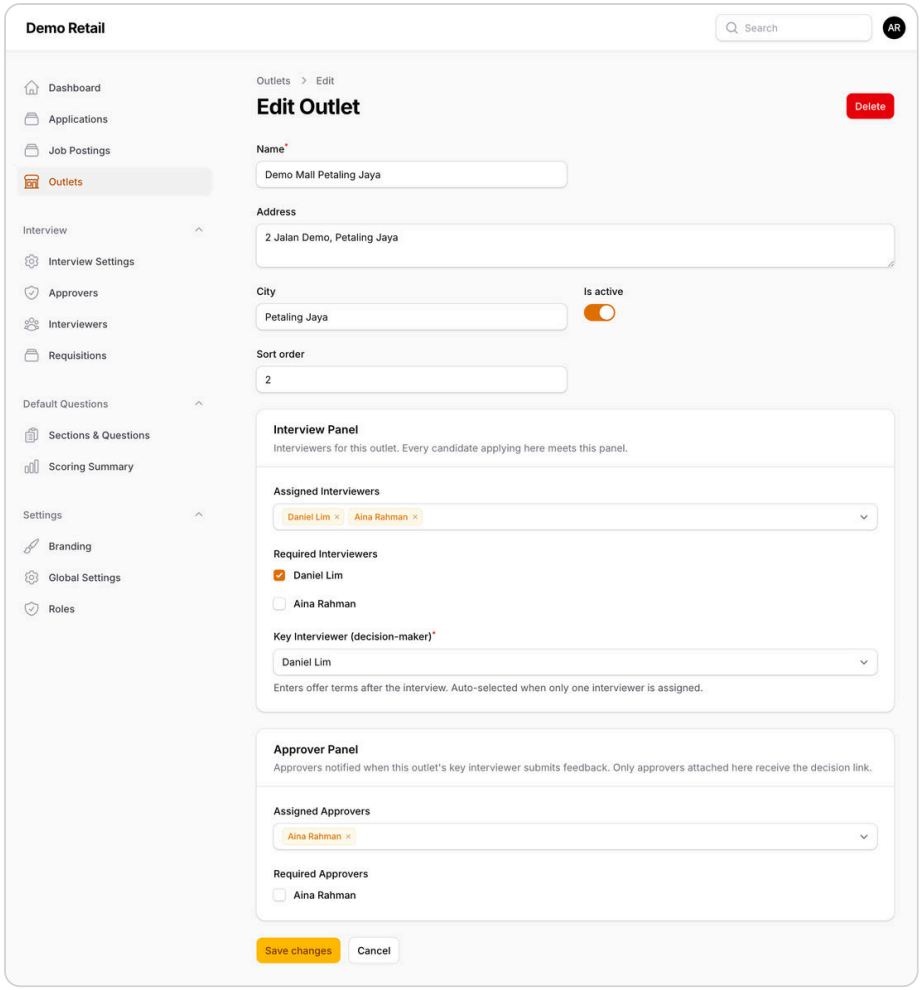
Each outlet decides who interviews its applicants and who approves its hires. Applicants pick an outlet when they apply, and the interview takes place at its address.

1. Press **Outlets** in the menu. Press **New outlet**, or **Edit** on an existing one.



2. Fill in **Name**, **Address** (shown to applicants as the interview location), **City**, **Is active** and **Sort order**.
3. Under **Interview Panel**:
    - **Assigned Interviewers**: everyone who interviews for this outlet. They must be on the **Interviewers** page first.
    - **Required Interviewers**: tick those whose free time must match. The others are invited but their calendar is not checked.
    - **Key Interviewer (decision-maker)**: the person who recommends the outcome and types the offer terms. Chosen for you when there is only one interviewer.

4. Under **Approver Panel**, pick the **Assigned Approvers**: the people who get the hiring decision link. **Required Approvers** has no effect today.
5. Press **Save changes**.

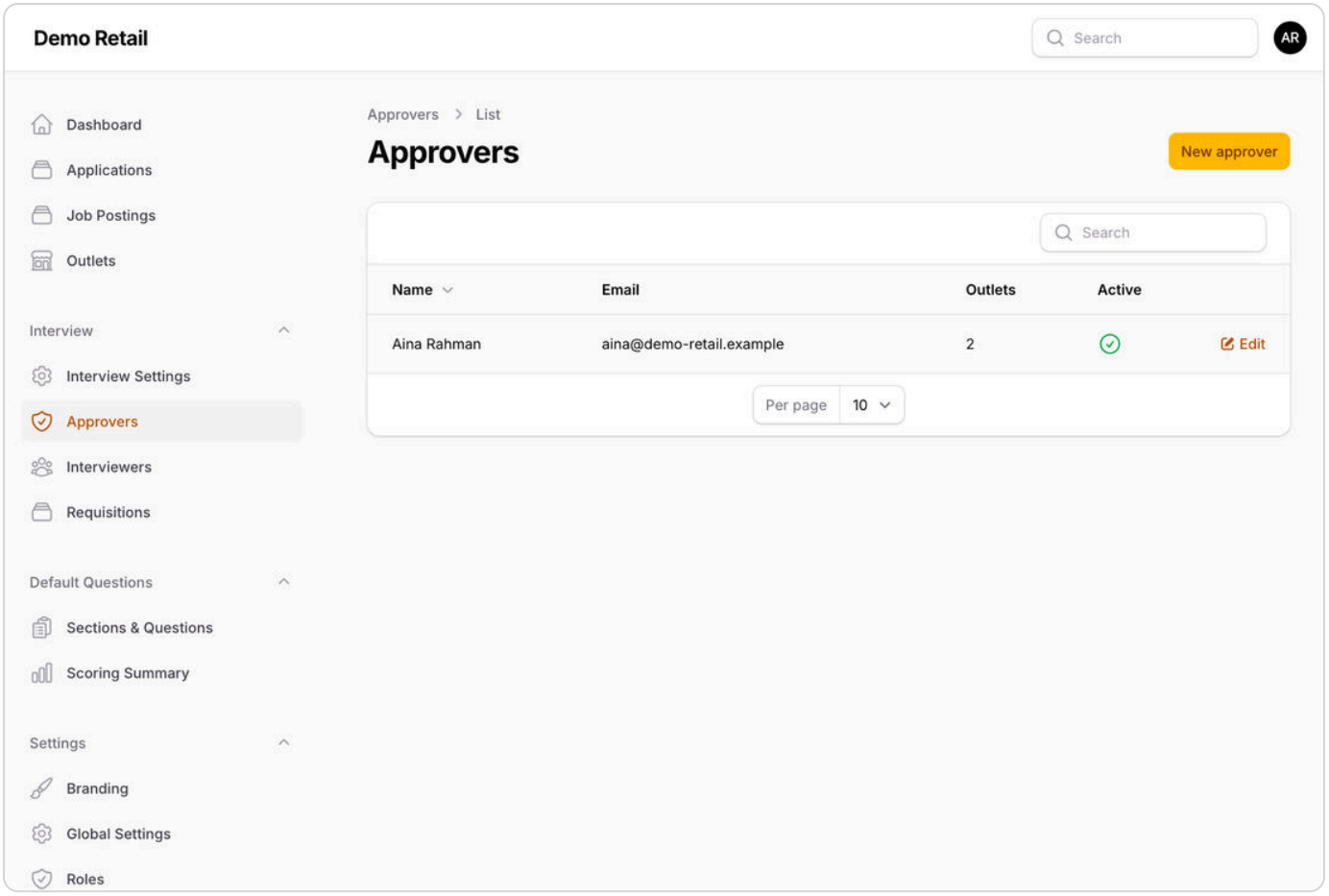


An outlet with no interviewers cannot hold interviews: shortlisting its applicants shows "Cannot schedule interview". An outlet with no approvers gets no hiring decision link; HR has to record the decision in the admin screens.

Approvers

A person must be on the **Approvers** page before you can add them to an outlet.

1. Under **Interview**, press **Approvers**, then **New approver**.
2. Pick the **User** and press **Create**. The **Outlets** column shows how many outlets they approve for.



Approvers here are for hiring decisions only. Position requests go to everyone with the **Management Approver** role instead (see "Settings, roles and the application form").

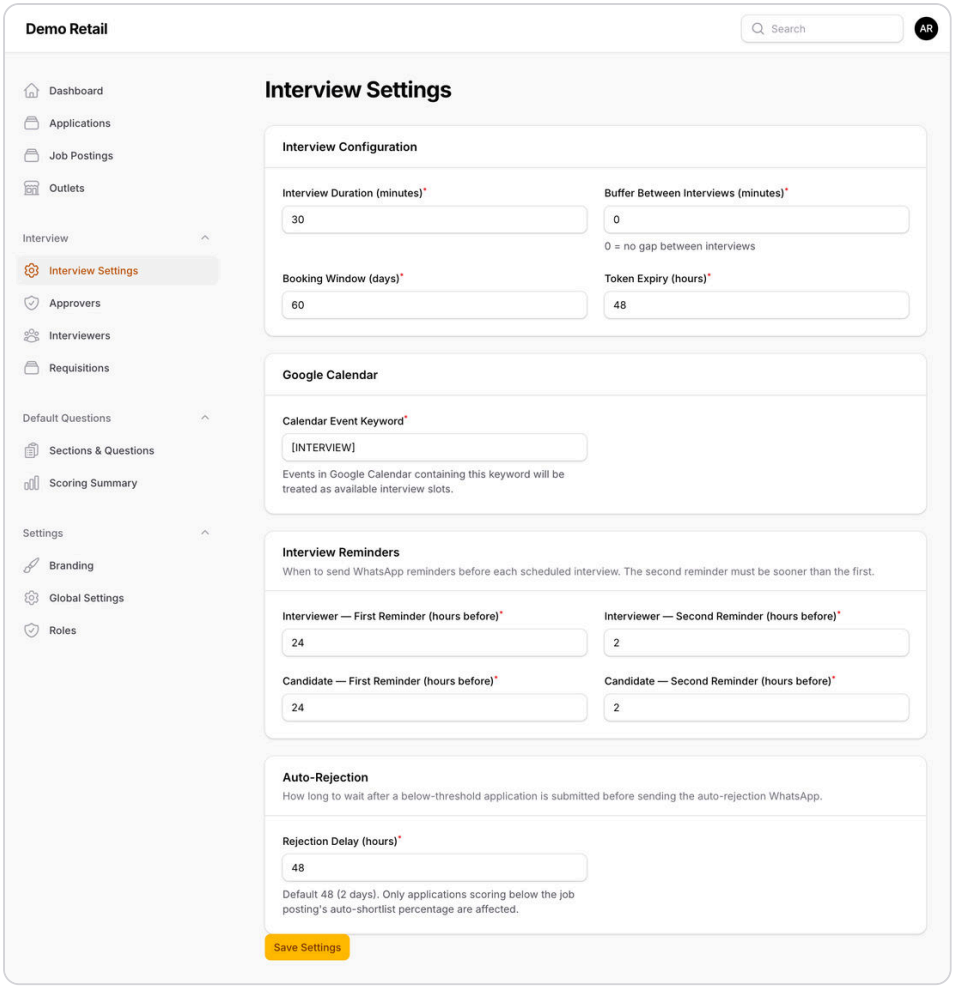
Settings, roles and the application form

For: Administrators

Interview Settings

Under **Interview**, press **Interview Settings**. Press **Save Settings** when done.

- **Interview Duration (minutes)** and **Buffer Between Interviews (minutes)**: the length of each time slot and the gap between them.
- **Booking Window (days)**: how far ahead applicants can book.
- **Token Expiry (hours)**: how long a booking link works.
- **Calendar Event Keyword**: the word that marks free time in an interviewer's Google Calendar.
- **Interview Reminders**: how many hours before the interview the first and second WhatsApp reminders go to interviewers and to the applicant.
- **Rejection Delay (hours)**: how long after applying a low-scoring applicant gets the rejection message. It applies to applications below the job's **Auto-Reject Below Percentage**, even though the help text under the box says "auto-shortlist percentage".

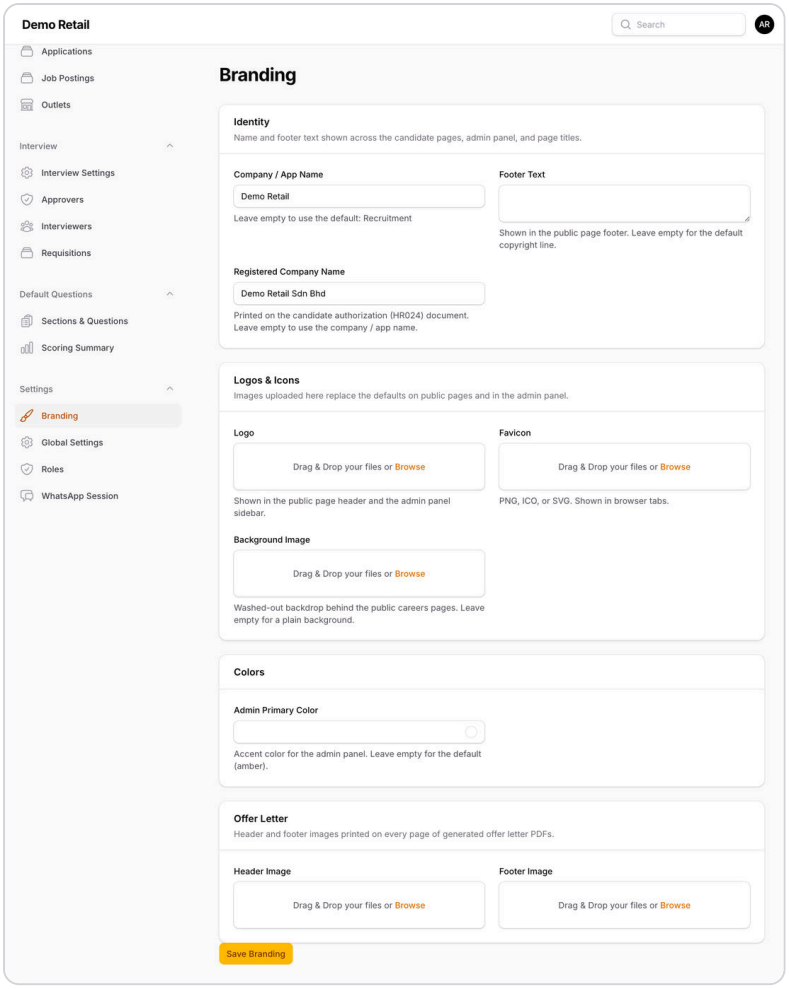


Branding

Under **Settings**, press **Branding**:

- **Company / App Name**: shown on the careers page, the admin screens and in WhatsApp messages.
- **Registered Company Name**: printed on the applicant's authorization form.
- **Logo**, **Favicon** (the small icon in the browser tab), **Background Image** and **Admin Primary Color**.
- **Offer Letter**: the **Header Image** and **Footer Image** printed on every page of the offer letter. Upload your own before the first offer; until you do, the app prints the images it came with.

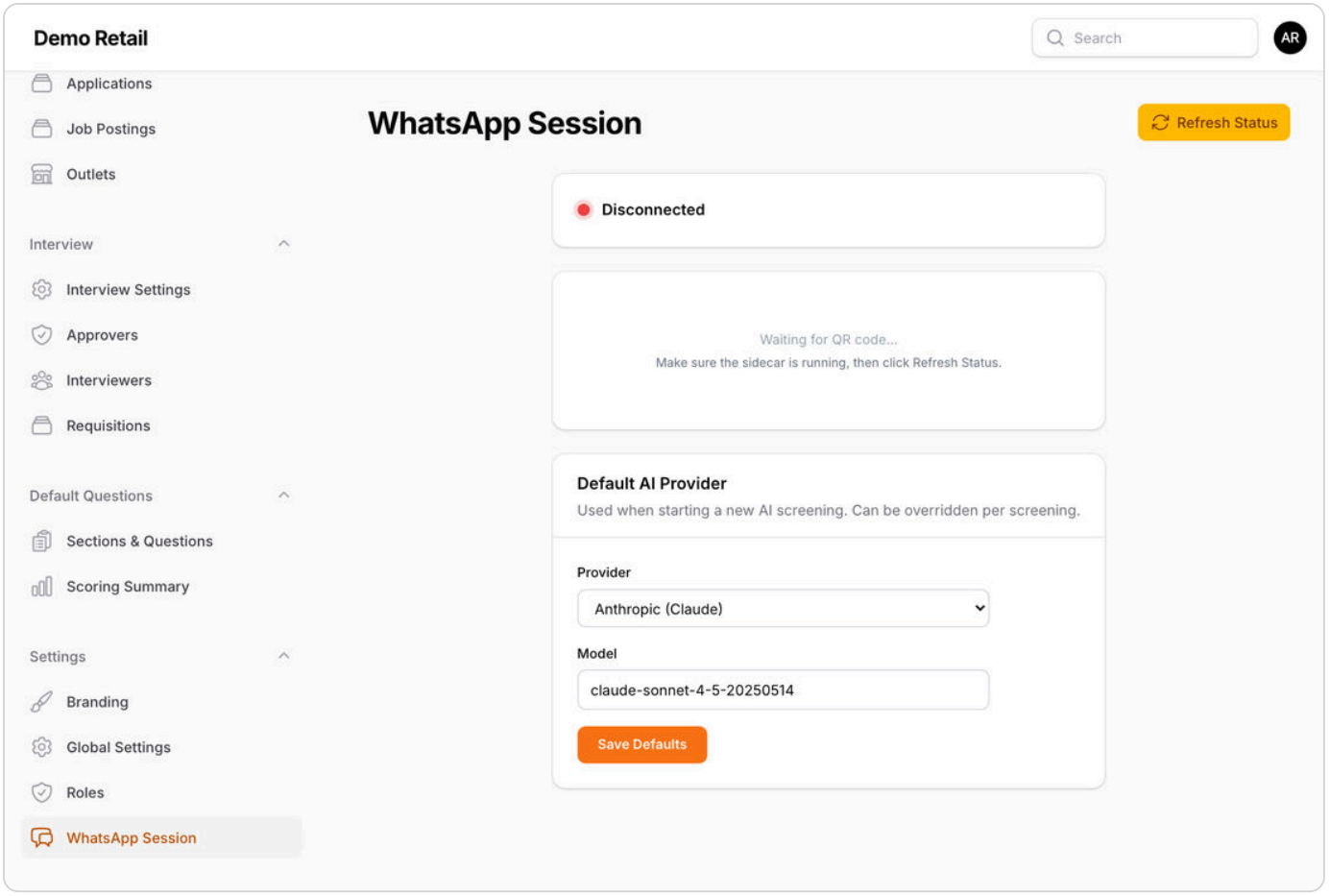
Press **Save Branding**.



WhatsApp Session and AI

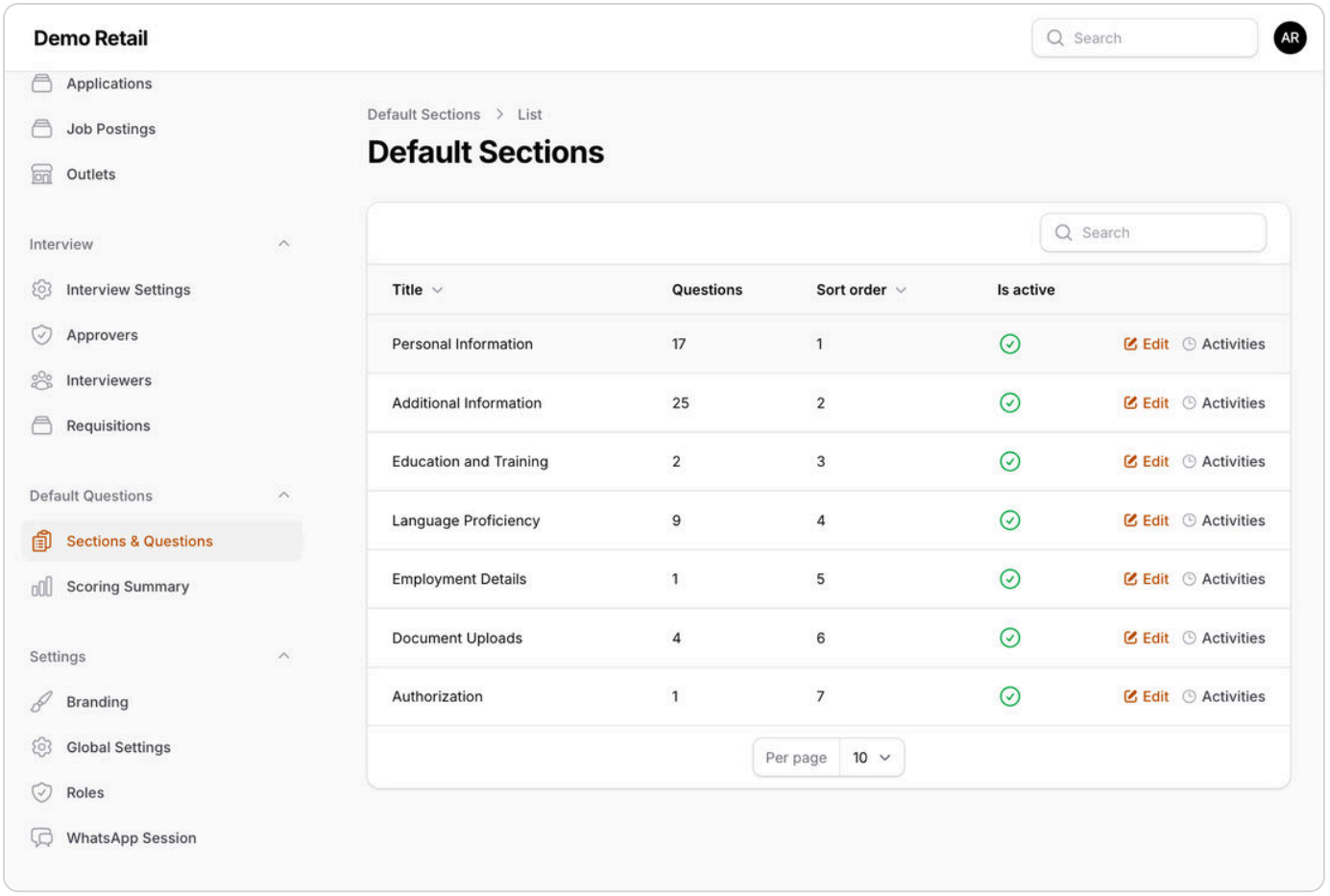
WhatsApp Session connects a second WhatsApp number used only by **AI Screenings**. It shows **Disconnected** until your administrator starts that connection; then you scan the code shown with WhatsApp. Your normal messages do not use it.

Default AI Provider on the same page sets the AI service and model used for AI Screenings and suggested interview questions. Press **Save Defaults**. Both need an AI service set up by your administrator.

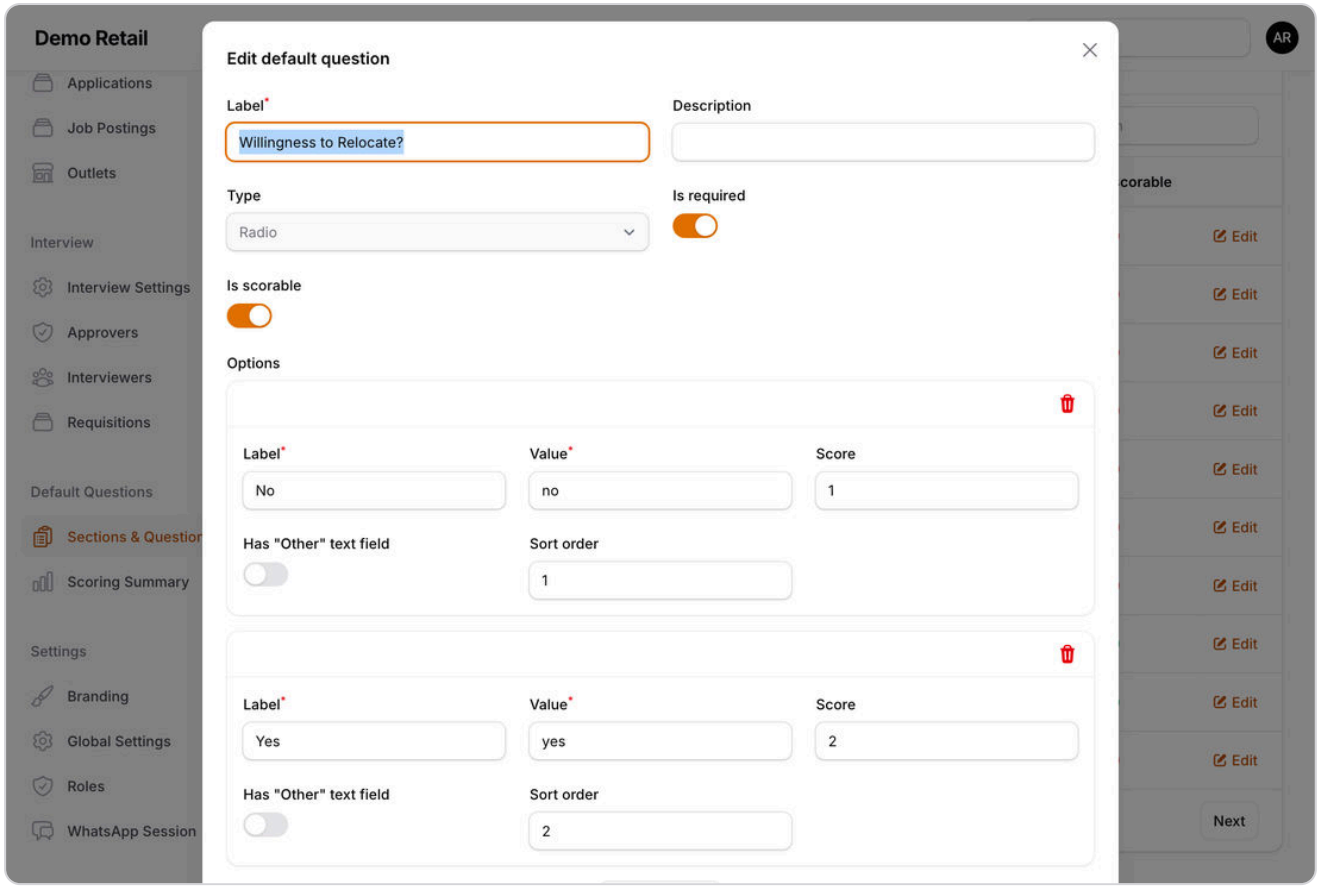


The standard application form

Every job uses the same standard form, made of 7 sections. Under **Default Questions**, press **Sections & Questions**.



1. Press **Edit** on a section. Scroll to **Questions** and press **Edit** on a question.
2. Change the **Label** (the question text), **Is required**, and **Is scorable** (whether the answer counts towards the score).
3. Under **Options**, each answer has a **Score**: the points it adds or, if negative, takes away. Press **Save changes**.



You can change and switch off sections and questions here, but not add new sections. Add questions for one job on the job posting instead (see "Open a job posting").

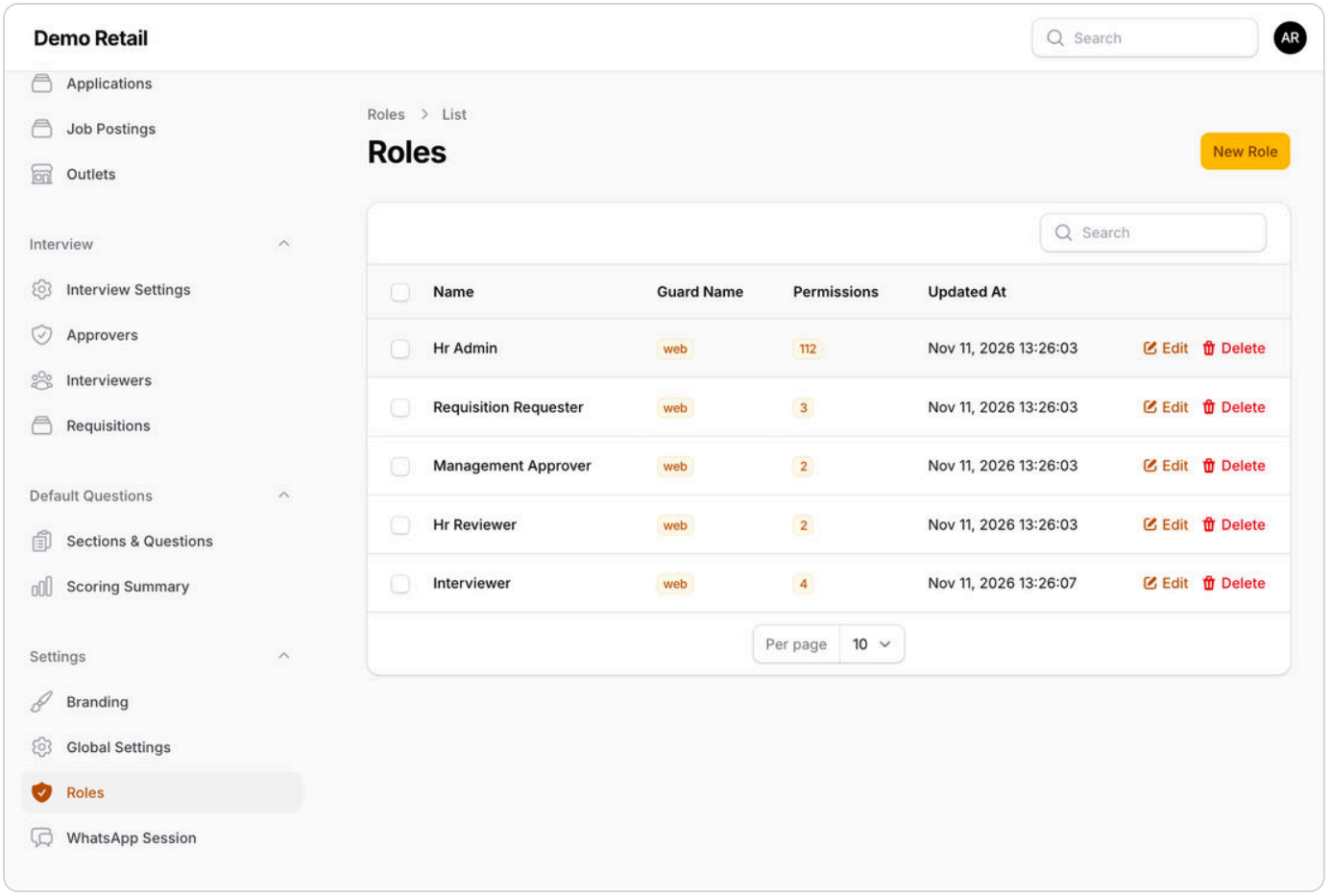
Scoring Summary lists every question that counts towards the score, with its lowest and highest points. Check it before you open jobs: the standard form comes with negative points for some personal and health answers.

Roles and accounts

Under **Settings**, press **Roles** to see who can do what. The roles that come with the module:

- **Hr Admin**: everything.
- **Hr Reviewer**: can see the applications list and pages only.
- **Requisition Requester**: can send position requests.
- **Management Approver**: receives position requests to approve.

Press **New Role** to make your own, for example one for interviewers that can view applications and interviews.



Giving a person an account or a role needs your system administrator today: the **Users** page does not open, even for Hr Admin. Every account needs the person's phone number, because codes and links go to it.

Global Settings has nothing to set today.

USER GUIDE · VERSION 1

Appraisal

Yearly or mid-year performance reviews. Staff rate themselves, their manager rates them without seeing those scores, and HR signs off the outcome.

1. What it is for
2. Open your appraisal
3. Fill in your self-appraisal
4. Check, change or answer your appraisal
5. Review a team member
6. Set up an appraisal round
7. See who has finished
8. Sign off an appraisal
9. Staff grades, departments and outlets

APPRAISAL

What it is for

For: Everyone

Appraisal replaces the paper performance review. Each review goes through four hands in order:

1. **The staff member** writes down what they set out to do, what they achieved, and rates themselves from 1 to 5.
2. **The appraiser**, the manager the staff member picks, rates the same items. The staff member's own scores stay hidden until the appraiser has submitted, so the manager is not swayed by them.
3. **The staff member** then sees both sets of scores side by side and says whether they agree.
4. **HR** checks the result, picks an outcome (for example a merit increment) and signs it off. A one-page summary can then be printed or saved as a PDF.

Who uses it

- **Staff**: open it on their phone with a one-time code sent by SMS or WhatsApp. No password is needed.
- **Appraisers**: any staff member who has been picked as someone's manager. They use the same screens as staff, and see a list of people waiting for their review.
- **HR**: set up each appraisal round, follow who has finished, and sign off results, in the admin screens. This needs the HR or super admin role.

The 1 to 5 scale

Score	Means
1 Very Unsatisfactory	Does not meet the required standards.
2 Unsatisfactory	Meets some required standards.
3 Satisfactory	Meets the required standards.
4 Good	Occasionally exceeds required standards.
5 Very Good	Consistently exceeds required standards.

What it needs

- A **staff directory**: names, employee numbers, positions, outlets or departments and staff grades. It is loaded by your system administrator; there is no screen for adding a person to it today. Someone who is not in the directory cannot start an appraisal.
- **Phone numbers** that can receive SMS or WhatsApp, for the one-time code and for the message that tells an appraiser someone is waiting.

Staff can switch the screens to English, Bahasa Melayu, Chinese, Nepali or Bengali with the **EN** button at the top.

The same module also runs staff surveys (**Surveys** on its front page). This guide covers appraisals only.

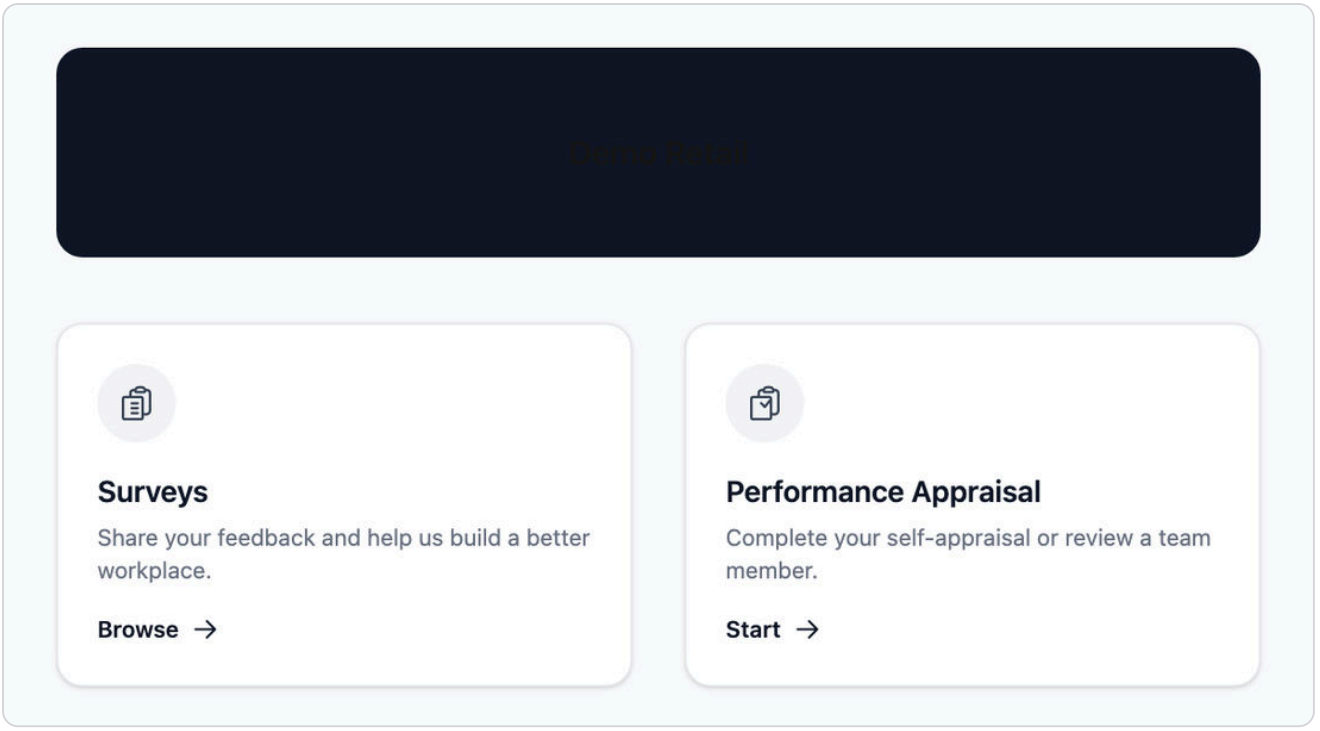
APPRAISAL

Open your appraisal

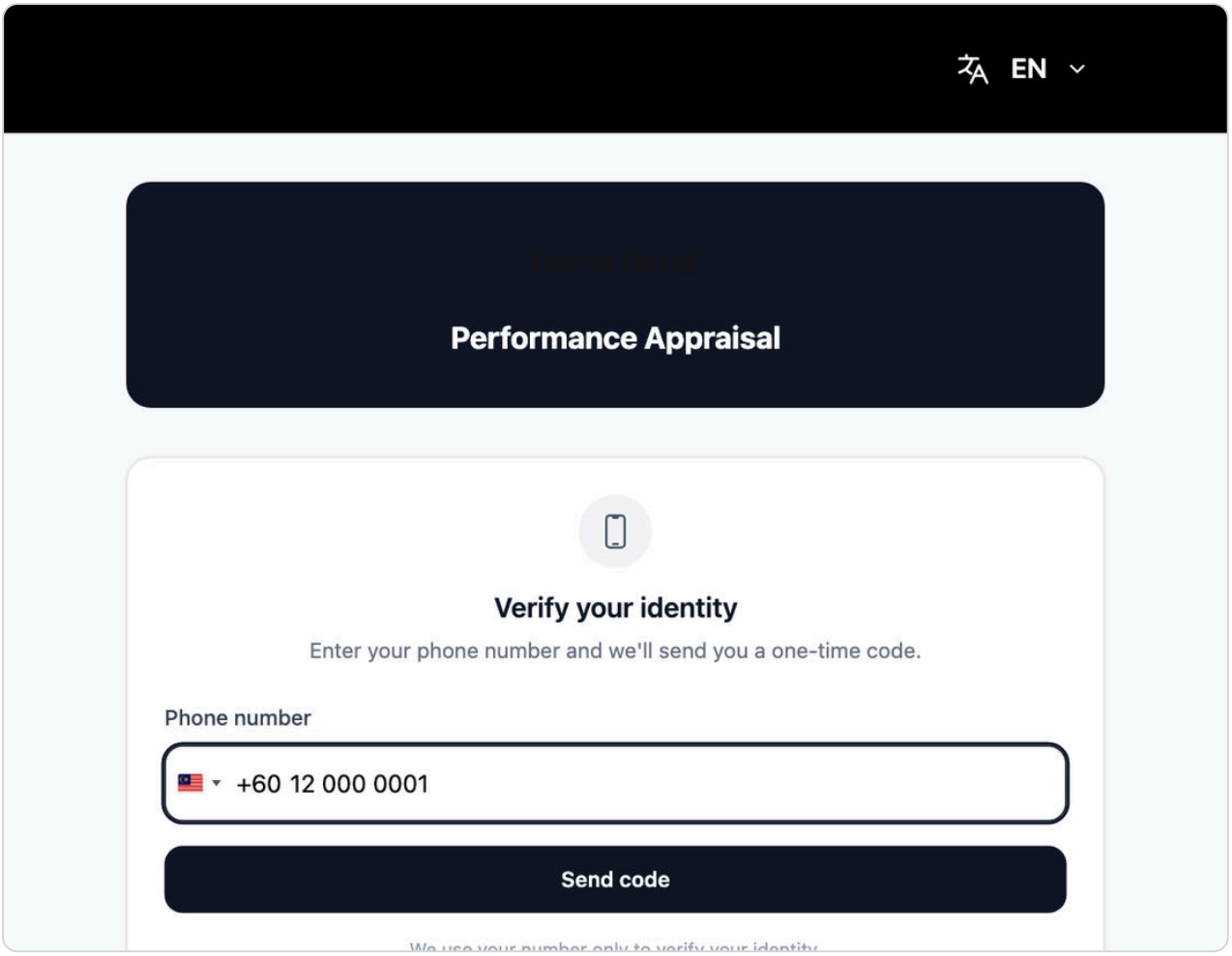
For: Staff and appraisers

You do not need a password. You prove who you are with a code sent to your phone.

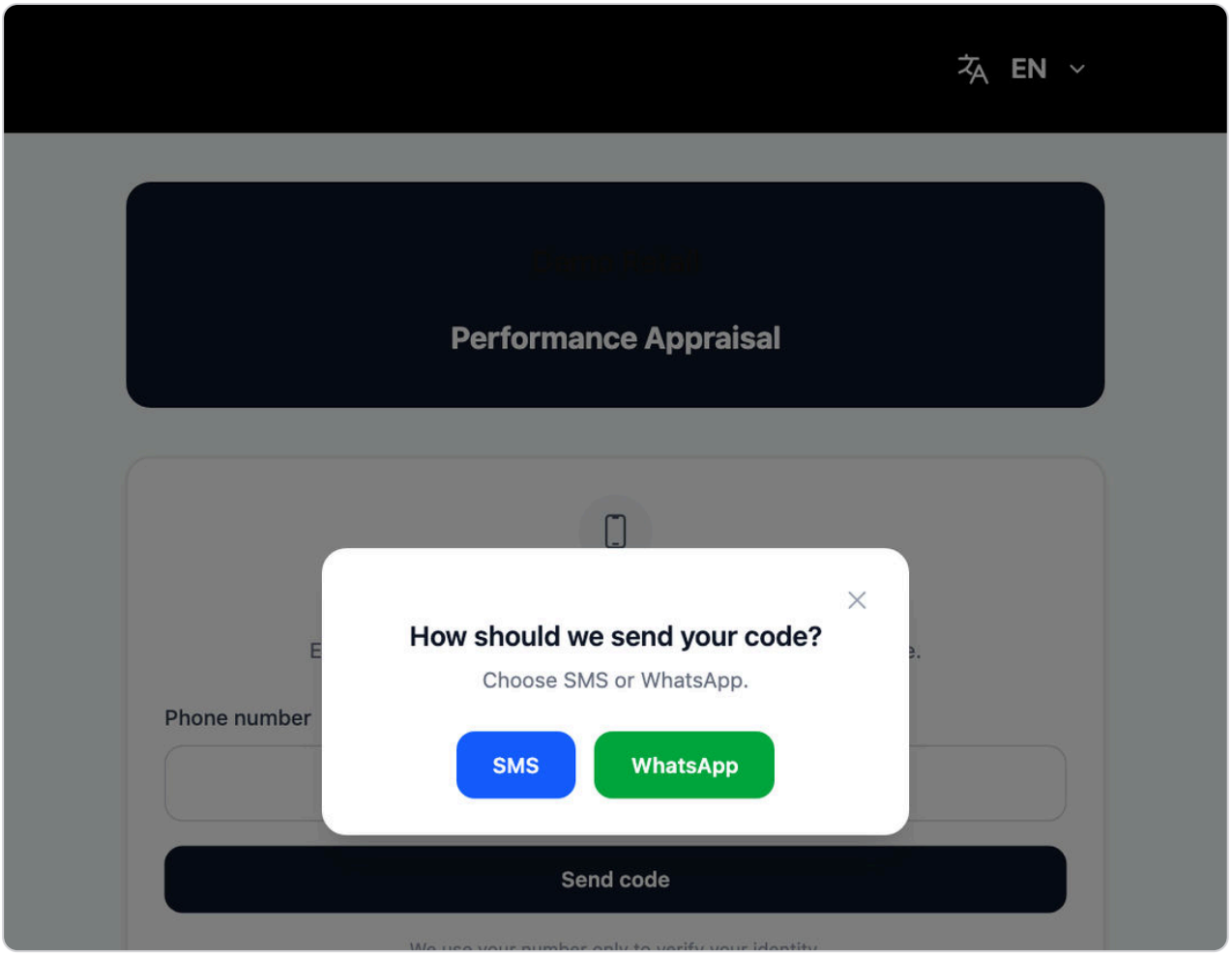
1. Open the Appraisal web address your HR team gave you. On the front page, press **Start** under **Performance Appraisal**.



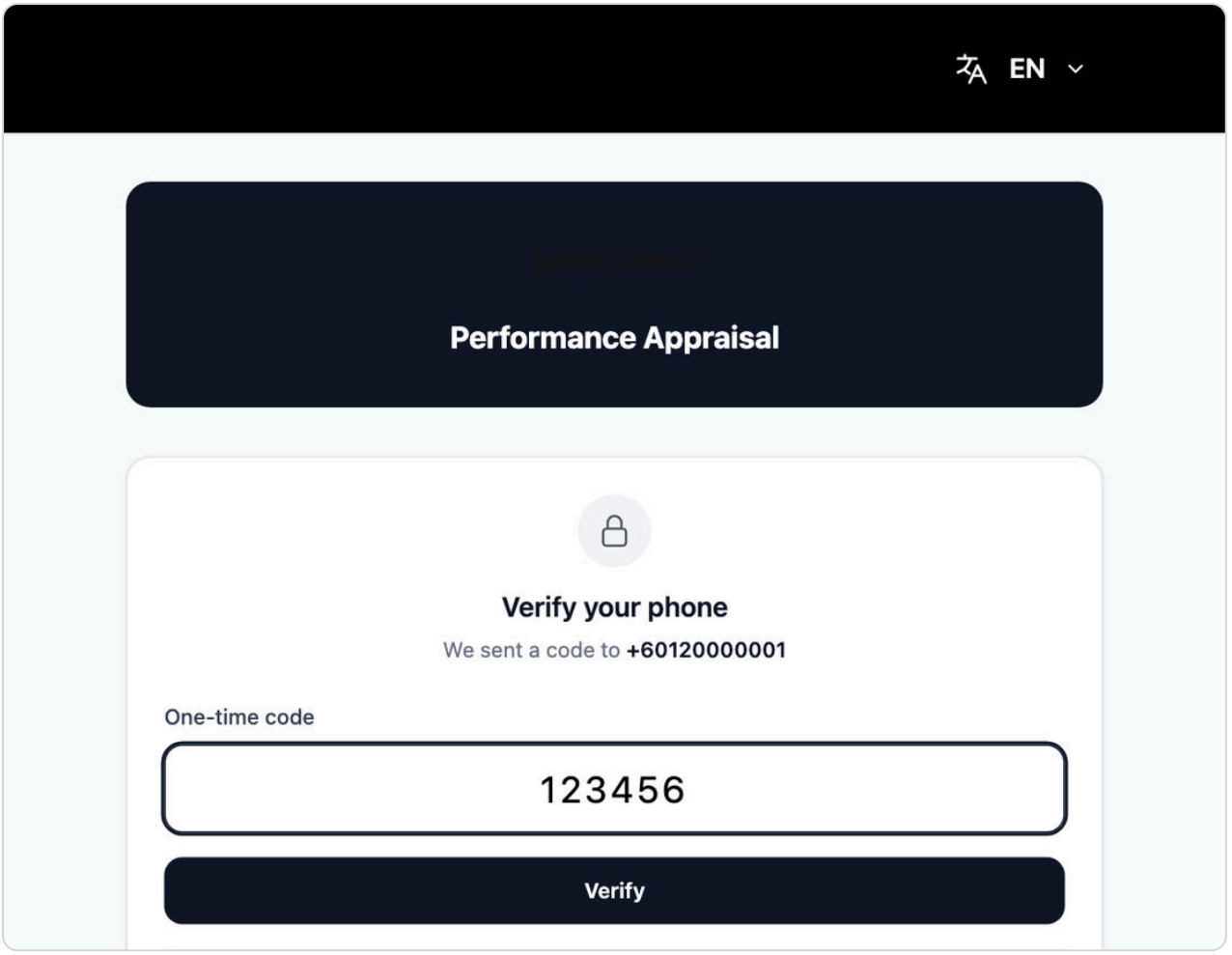
2. Type your phone number under **Phone number**. The country code (+60 for Malaysia) is already chosen; change it with the flag if you need to. Press **Send code**.



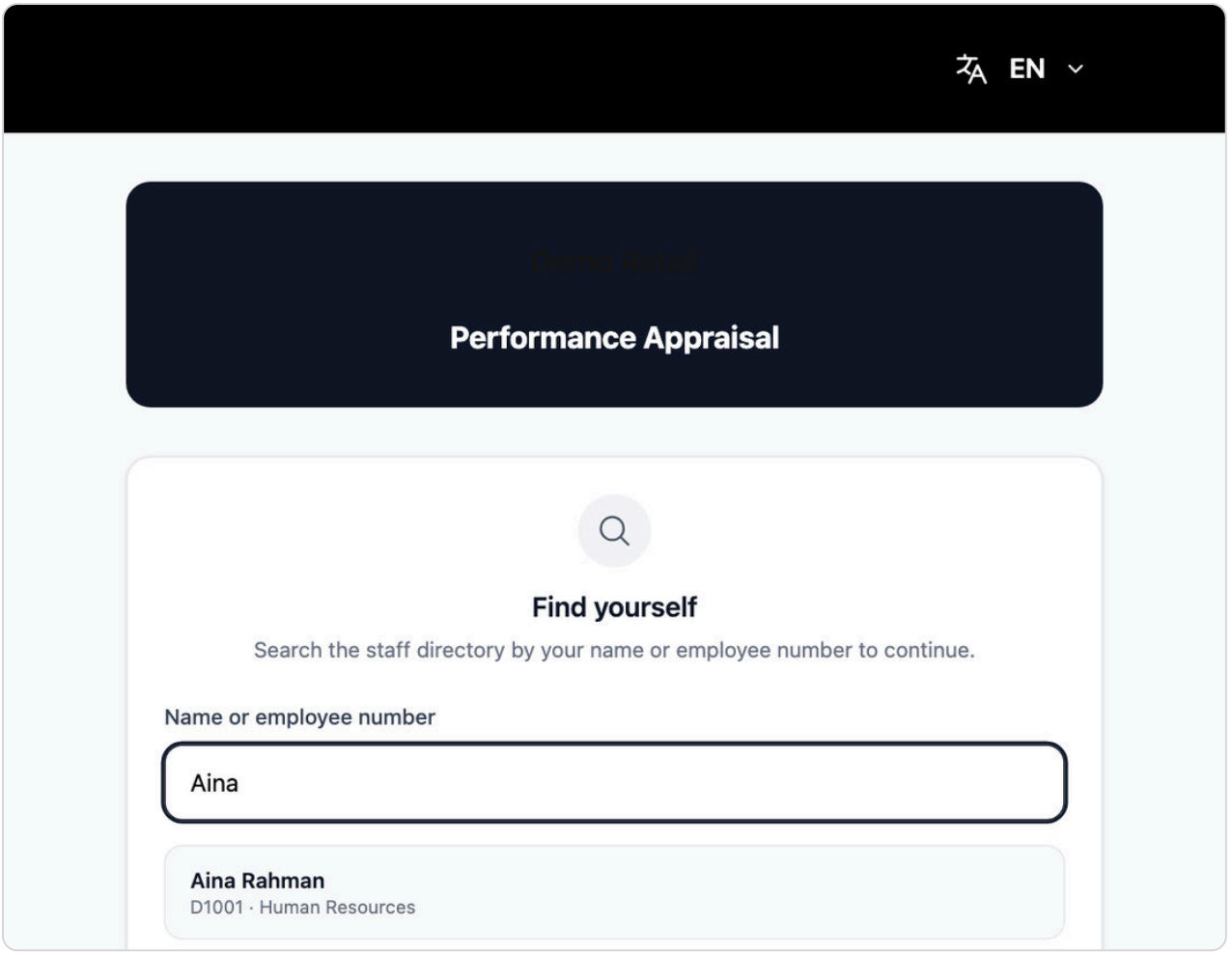
3. Choose **SMS** or **WhatsApp**.



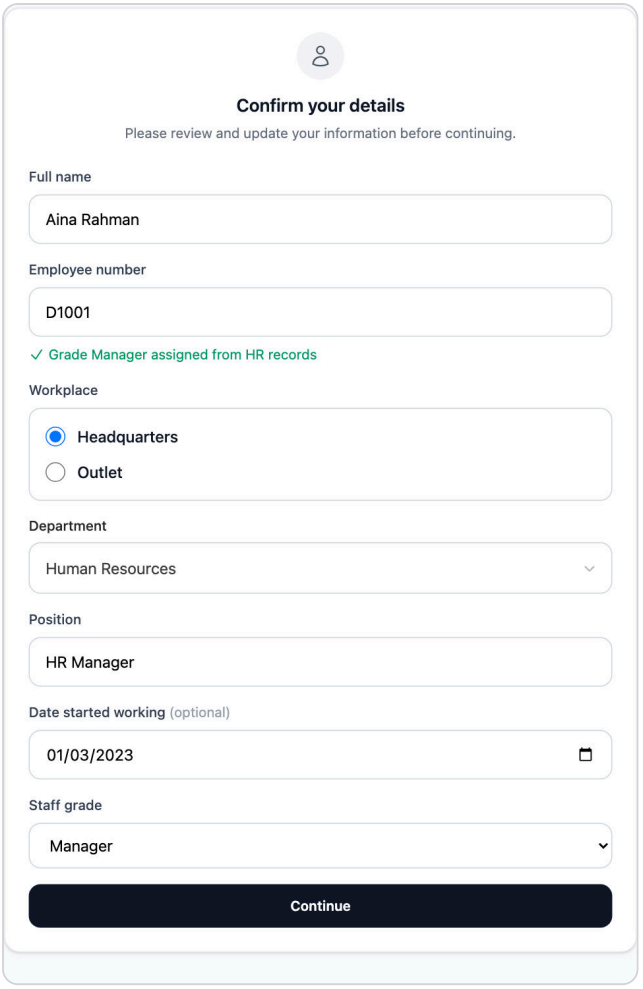
4. Type the 6-digit code you received under **One-time code** and press **Verify**. If it does not arrive, wait for the countdown and press **Resend code**.



5. **First time only:** the **Find yourself** screen opens. Type at least 2 letters of your name or your employee number, then press your name in the list.



6. On **Confirm your details**, check your name, employee number, workplace, position and staff grade. Correct anything that is wrong and press **Continue**.



You land on **My Appraisals**. If you only have your own self-appraisal to do, it opens straight away.

When something goes wrong

- **"No matching record"** on Find yourself: you are not in the staff directory yet. Ask HR to add you.
- **"Already linked"** next to your name: another phone number has already claimed that record. The last 4 digits of that number are shown. Ask HR to fix it.
- **"Employee number not found"**: the number you typed does not match the directory. Check it with HR.
- **The code never arrives:** press **Can't receive the code? Log in with your account** and sign in with your company account (phone number and password) instead. If you see "Your account has no phone number linked", ask HR.
- To leave, press your name at the top right and choose **Log out**.

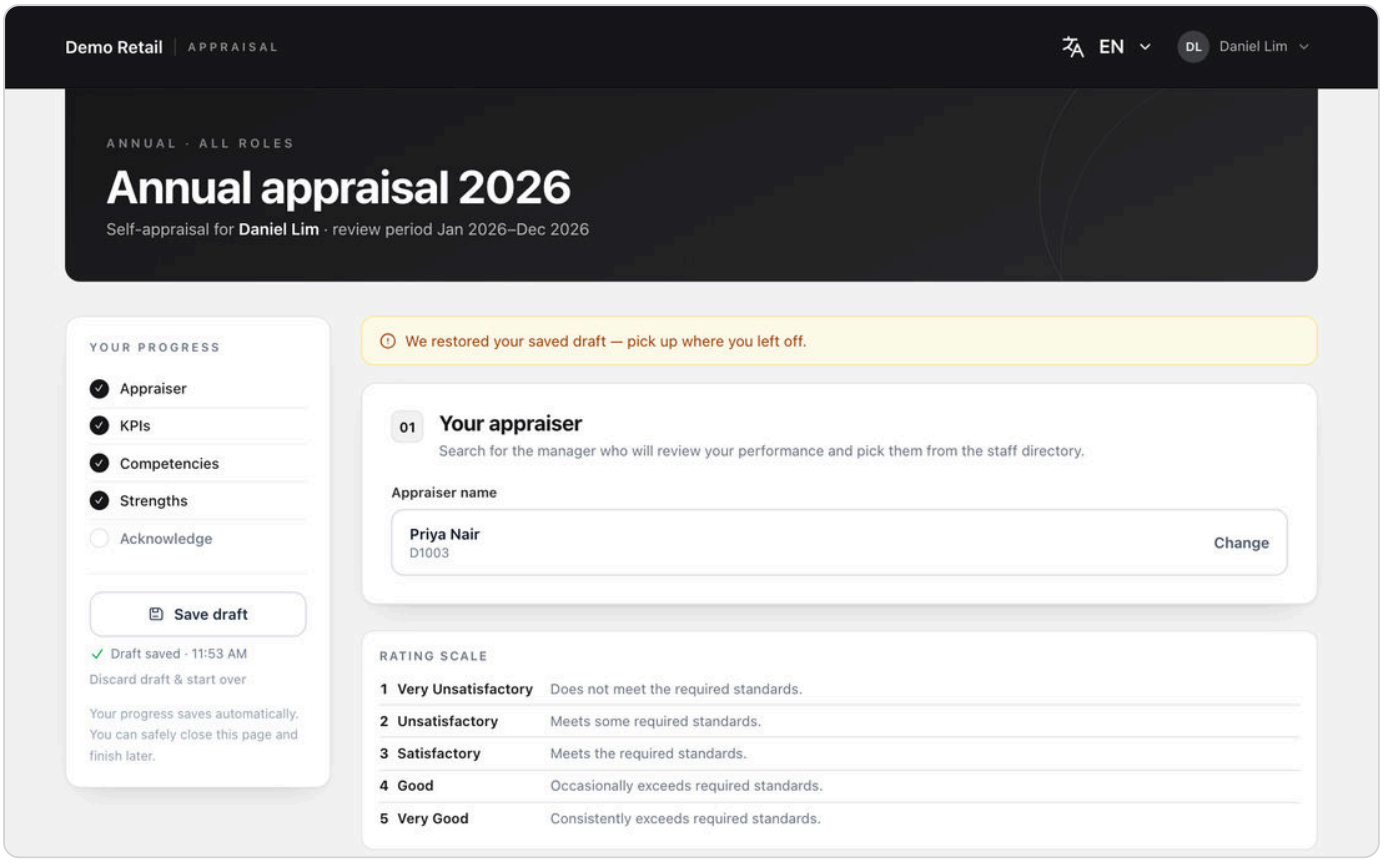
APPRAISAL

Fill in your self-appraisal

For: Staff

Your answers save by themselves every time you change something. You can close the page and come back later; you will see "We restored your saved draft — pick up where you left off."

The list on the left, **Your progress**, ticks each part as you finish it.



1. Your appraiser

Type your manager's name or employee number in the search box and press their name. To pick someone else, press **Change**. You cannot pick yourself.

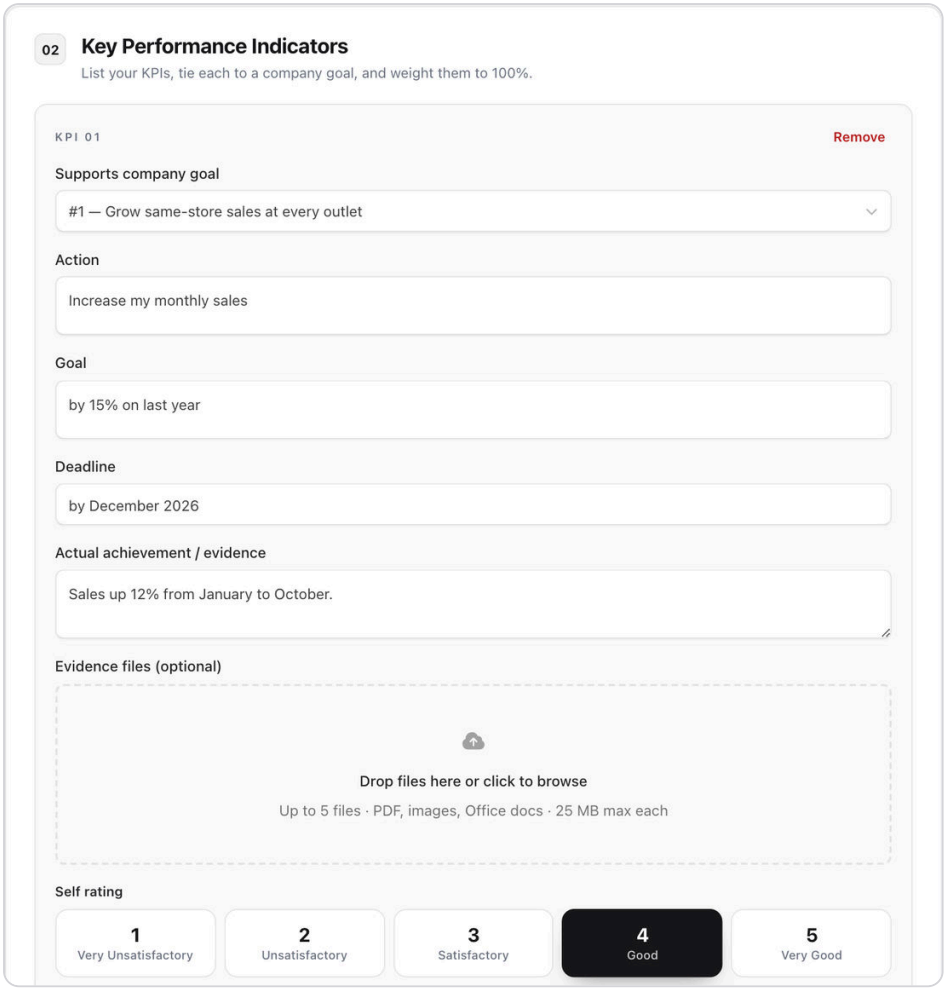
2. Key Performance Indicators

A KPI, or key performance indicator, is one thing you were expected to deliver this period. For each one:

1. Under **Supports company goal**, pick the company goal it helps. HR sets this list.
2. **Action**: what you set out to do ("Increase my monthly sales").

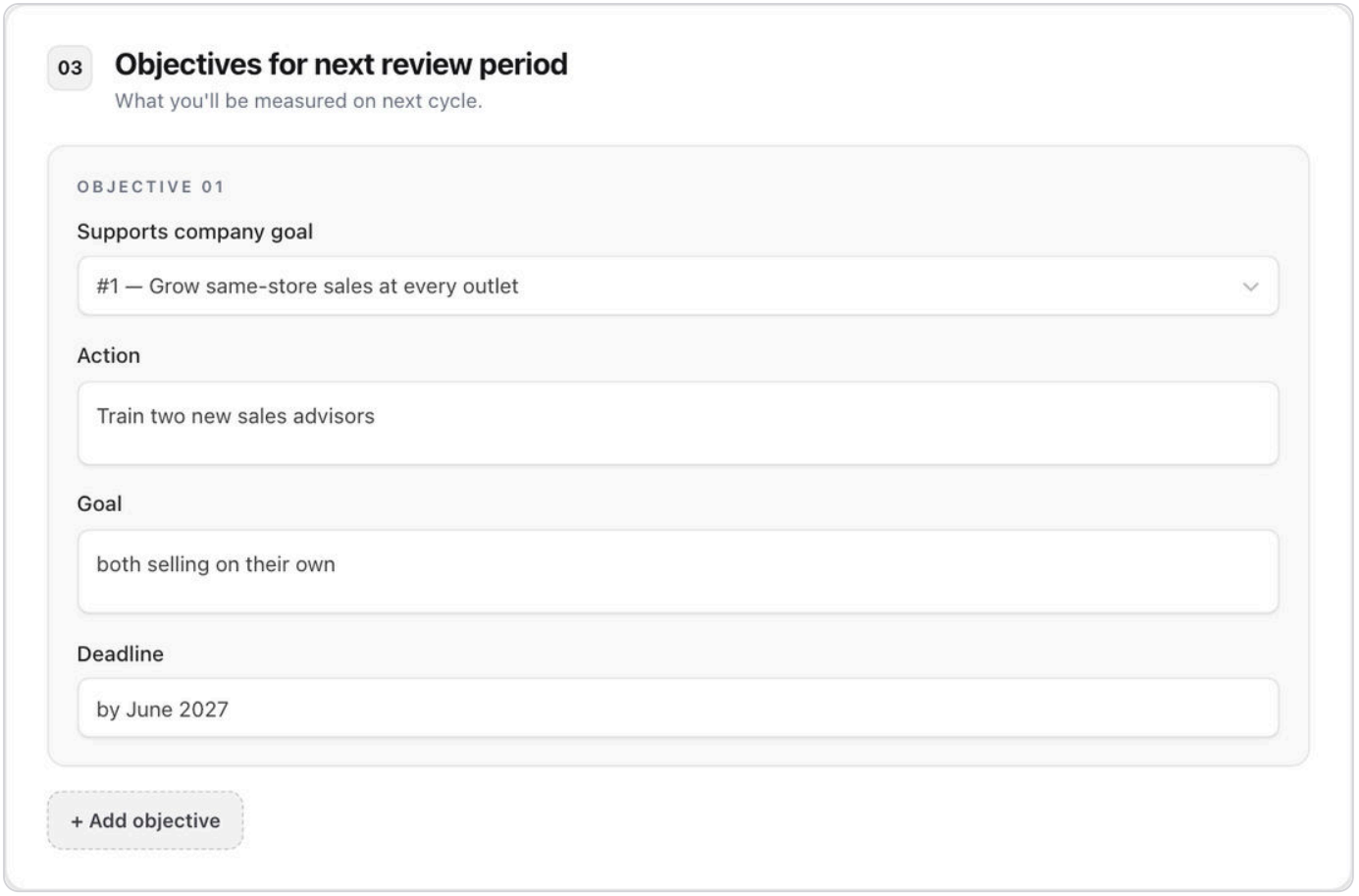
3. **Goal**: how much ("by 15% on last year").
4. **Deadline**: by when.
5. **Actual achievement / evidence**: what actually happened, in numbers where you can.
6. **Evidence files (optional)**: drop in up to 5 files (PDF, pictures or Office files, 25 MB each).
7. Under **Self rating**, press the score from 1 to 5 that fits.

Press **+ Add KPI** for another one, or **Remove** to delete one.



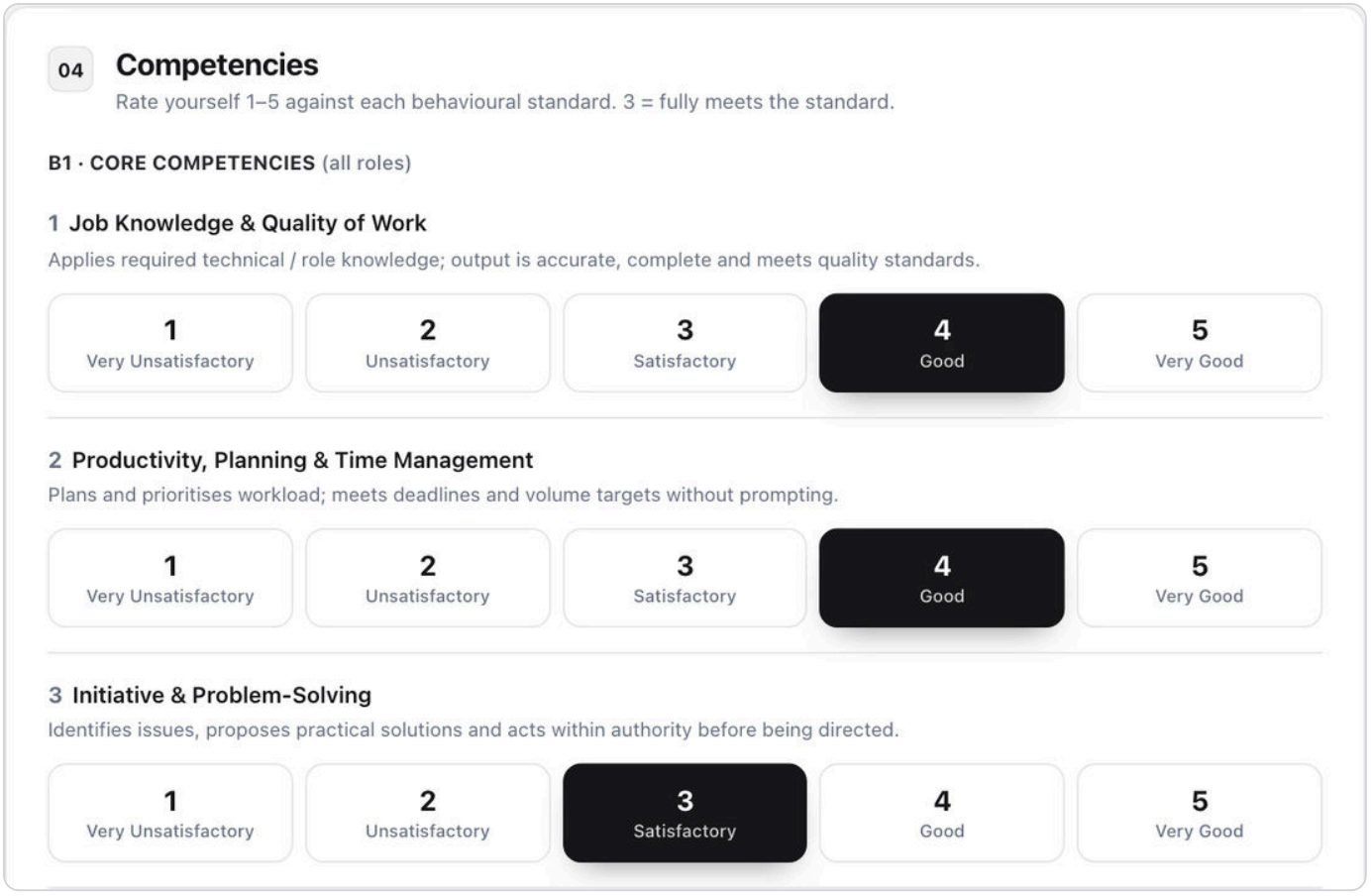
3. Objectives for next review period

Write at least one thing you want to be measured on next time, in the same way: company goal, **Action**, **Goal** and **Deadline**. Press **+ Add objective** for more. Your appraiser can change these.



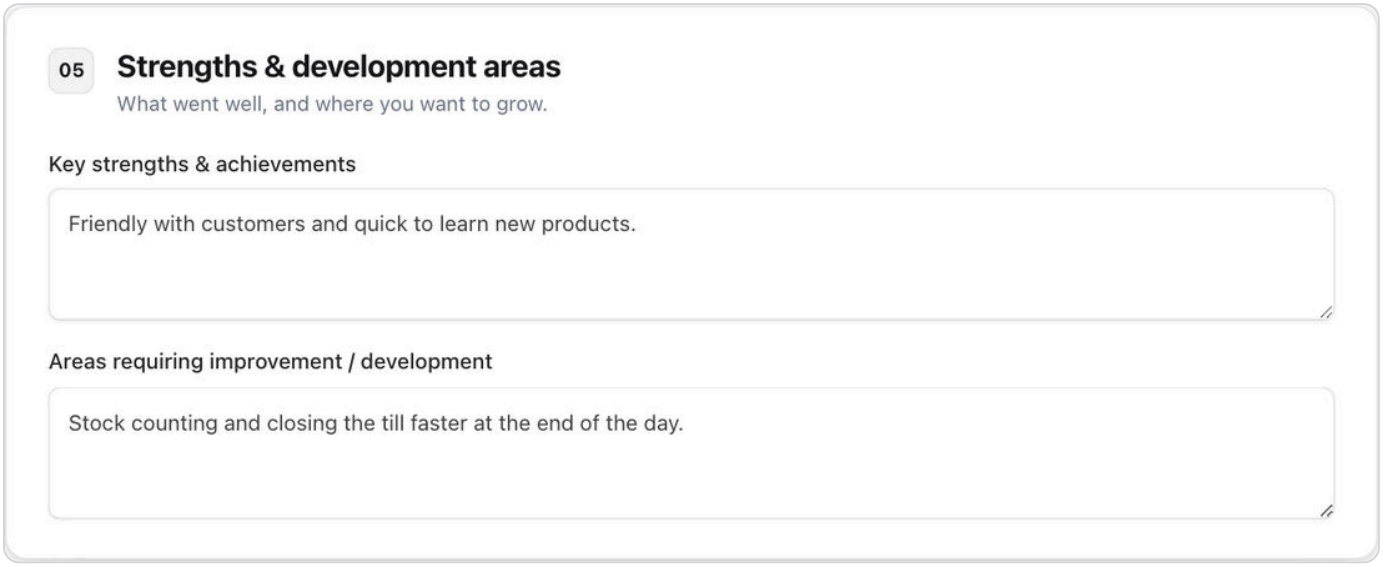
4. Competencies

Rate yourself from 1 to 5 on each behaviour listed. 3 means you fully meet the standard. Everyone rates the 7 **Core Competencies**. Managers also rate 5 **Leadership Competencies**; whether you see them depends on your staff grade.



5. Strengths & development areas

Write what went well under **Key strengths & achievements** and where you want to grow under **Areas requiring improvement / development**.



Submit

Press **Submit appraisal** at the bottom. By submitting you confirm the appraisal is accurate and agree it will be reviewed by your appraiser and HR.

If something is missing, the page shows what to fix. Once it is accepted, your appraiser is sent a WhatsApp message with a link to your review.

To throw away your draft and begin again, press **Discard draft & start over** on the left. This cannot be undone.

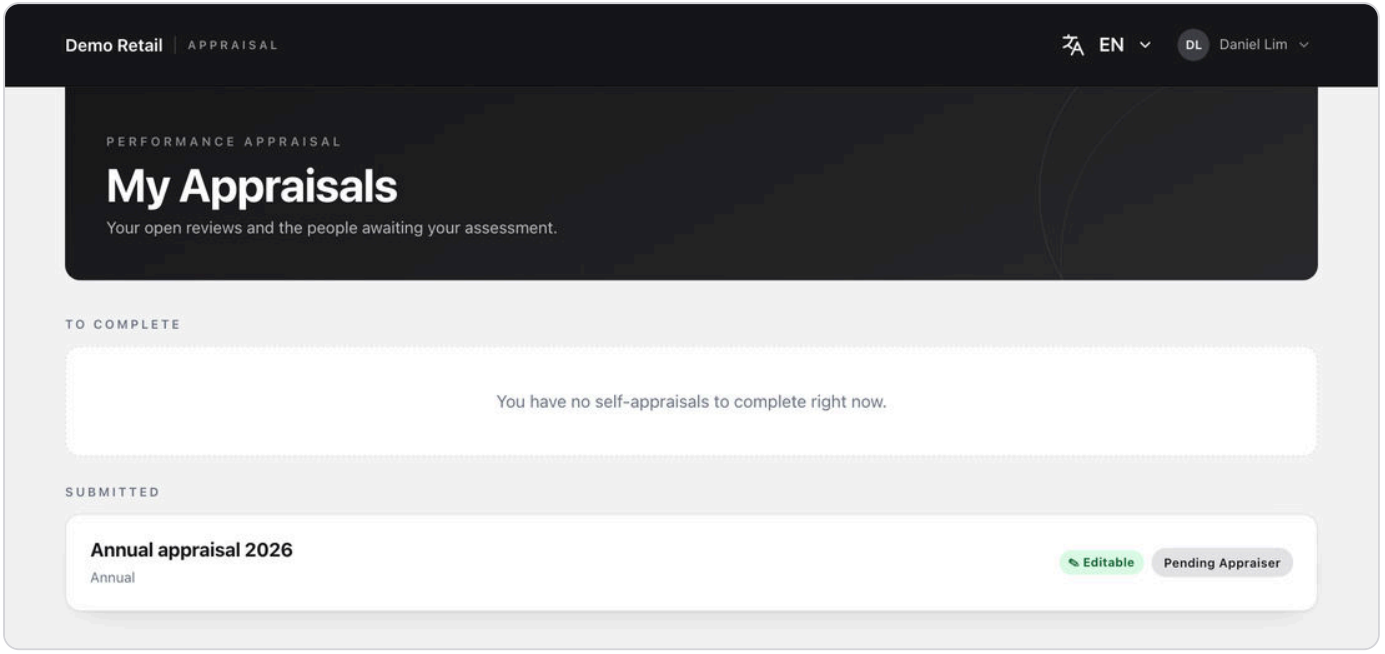
APPRAISAL

Check, change or answer your appraisal

For: Staff

After you submit, your appraisal moves to **Submitted** on **My Appraisals**. The grey label shows where it is:

- **Pending Appraiser**: waiting for your appraiser.
- **Appraiser Locked**: your appraiser has rated you.
- **Completed**: HR has signed it off.

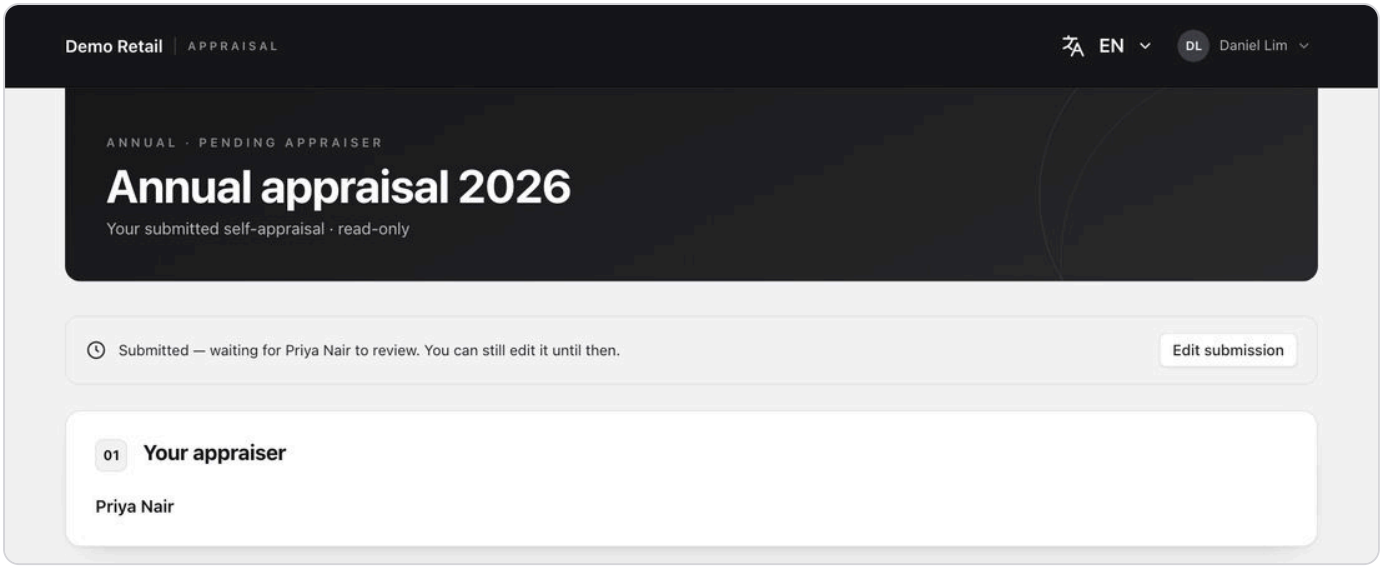


Press the appraisal to read what you sent.

Change it before your appraiser reviews it

While the green **Editable** label shows, you can still make changes.

1. Open the appraisal and press **Edit submission**.
2. Confirm. Your appraisal is taken back from your appraiser and opens as a form again.
3. Make your changes and press **Submit appraisal** again.

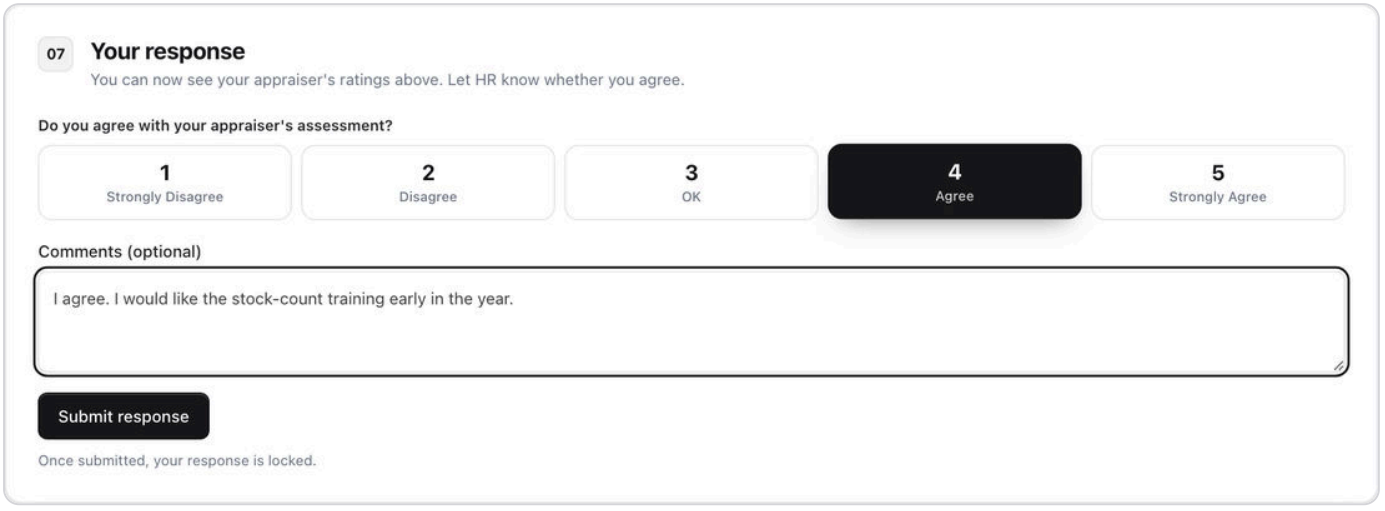


Once your appraiser has submitted their ratings, you can no longer change yours.

Say whether you agree

When your appraiser has finished, open the appraisal again. You now see their score next to yours for every item, and their comment.

1. At the bottom, under **Your response**, answer **Do you agree with your appraiser's assessment?** from **1 Strongly Disagree** to **5 Strongly Agree**.
2. Add **Comments (optional)** if you want HR to know why.
3. Press **Submit response**. Your response is then locked.



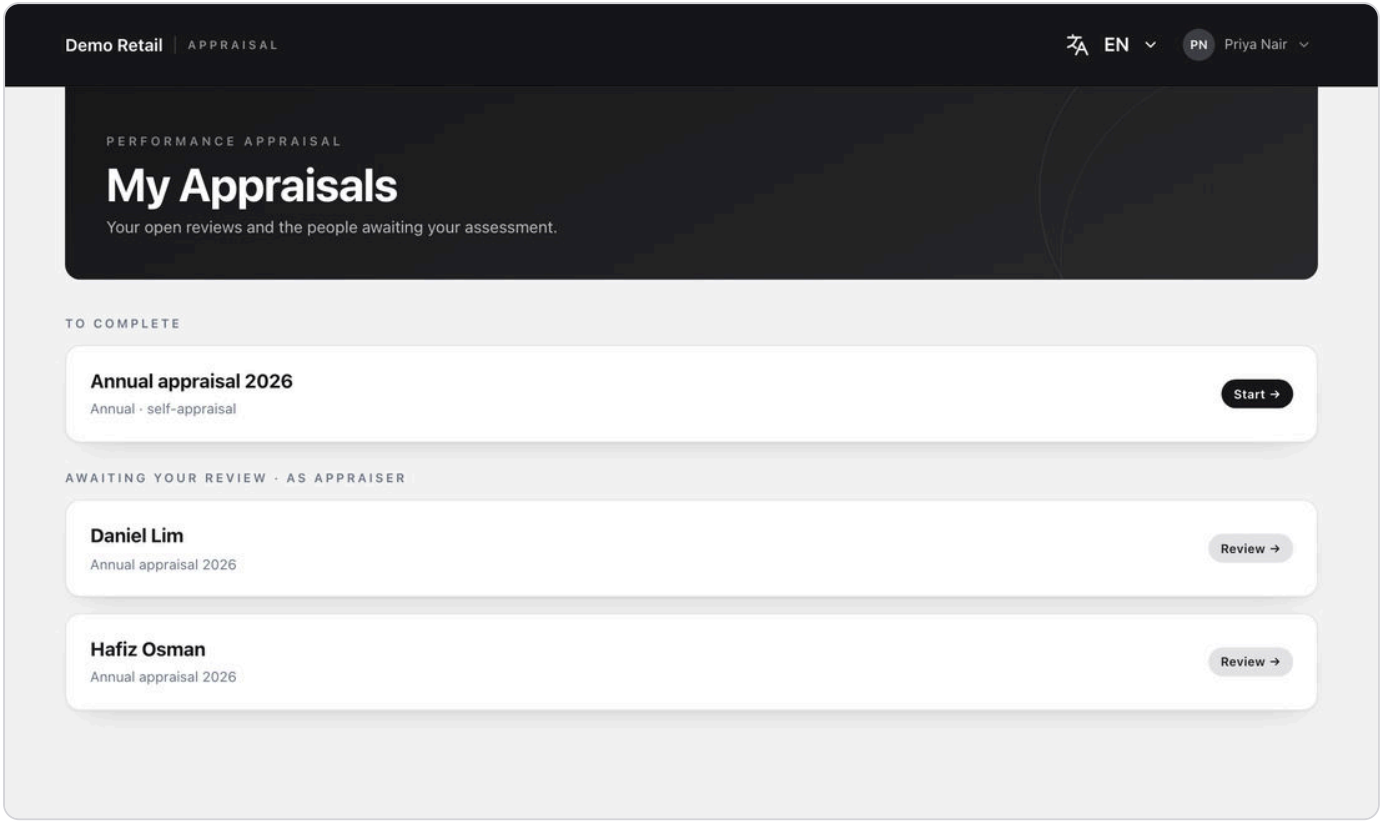
HR can see your answer straight away.

APPRAISAL

Review a team member

For: Appraisers

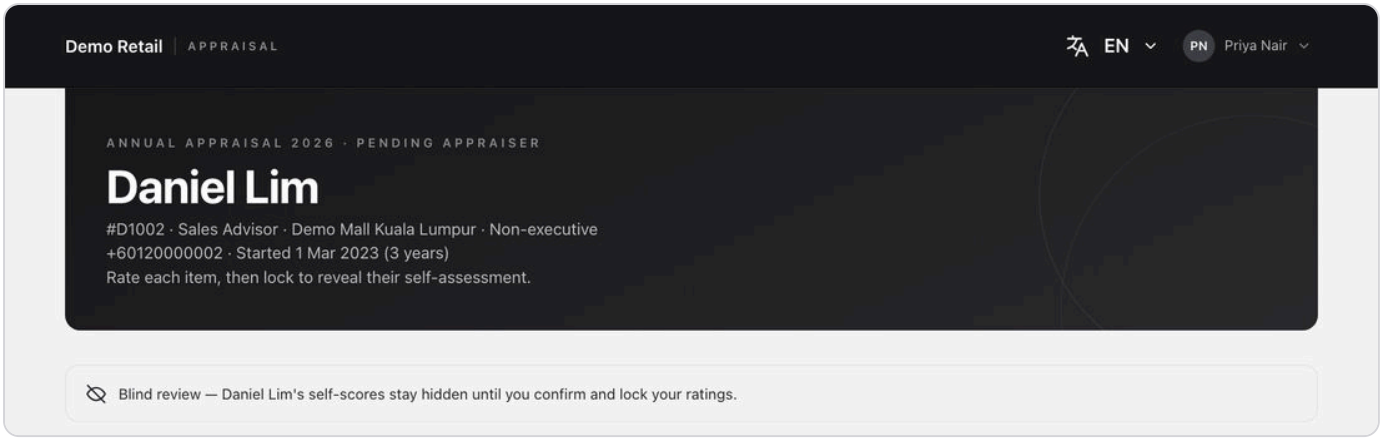
When someone picks you as their appraiser and submits, you get a WhatsApp message with a link. The link opens their review directly. You can also open the Appraisal page yourself (see "Open your appraisal"); people waiting for you are listed under **Awaiting your review · as appraiser**.



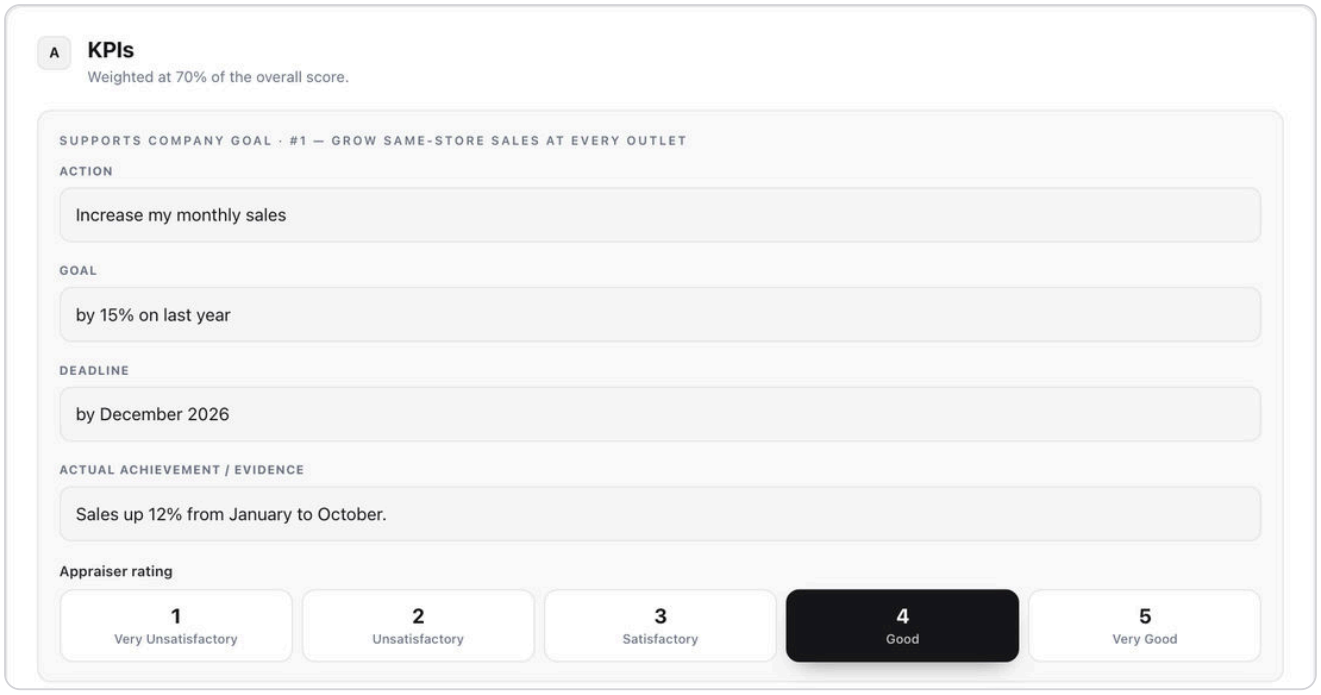
Press **Review** next to the person.

Rate without seeing their scores

This is a blind review: the staff member's own scores stay hidden until you submit yours. You see everything else they wrote.



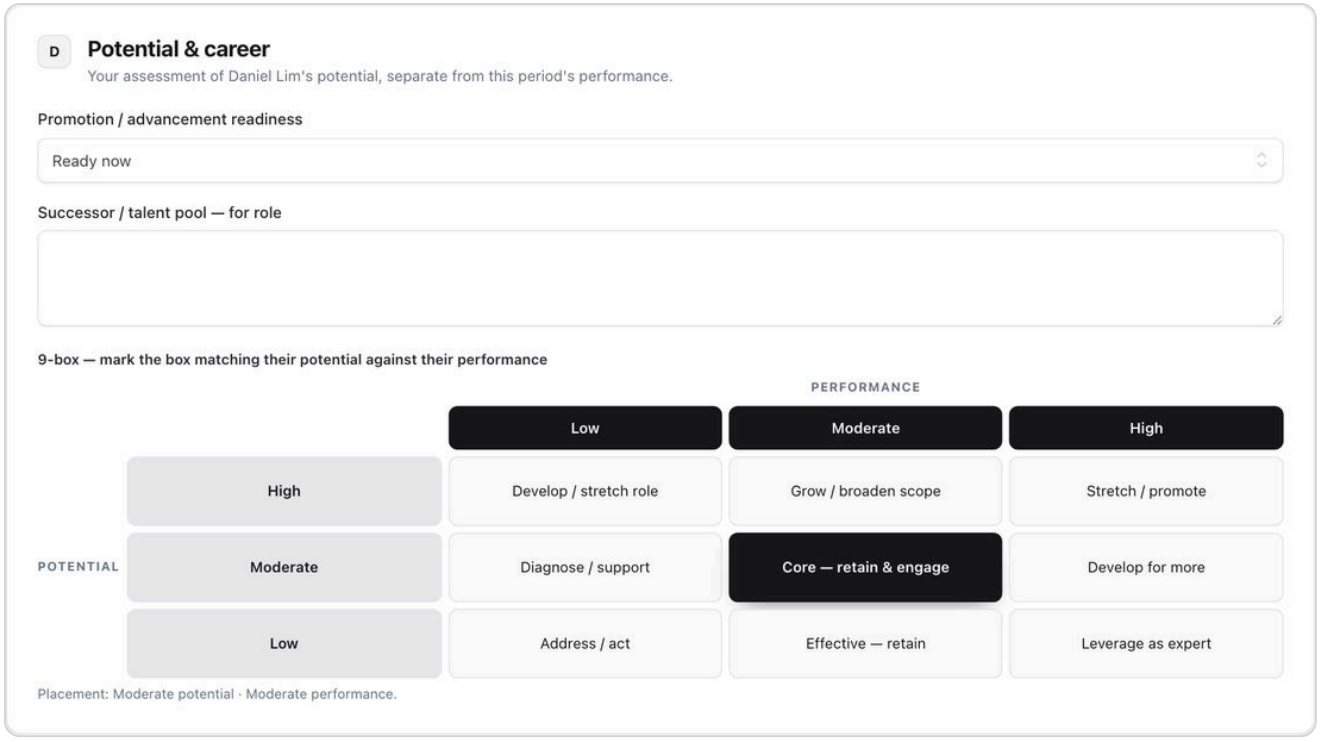
1. **A · KPIs**: read each KPI and press a score from 1 to 5 under **Appraiser rating**.



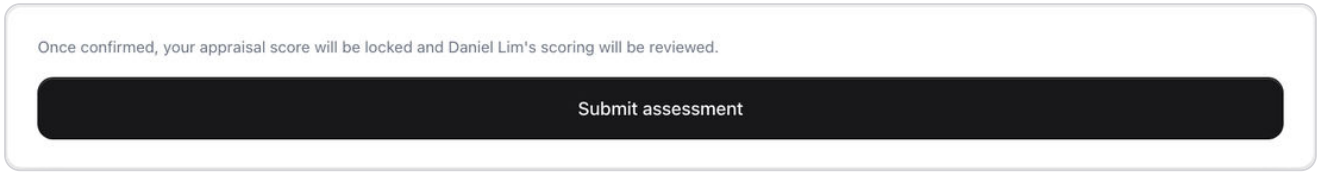
2. **B · Competencies**: score each behaviour the same way.
3. **Objectives for next review period**: the objectives the staff member proposed. Change them, delete them or press **+ Add objective**. This list becomes final when you submit. At least one is needed.
4. **C · Development & training plan**: press **+ Add development item**, then write the gap, the agreed action and pick a **Deadline**.



5. **D · Potential & career**: choose **Promotion / advancement readiness**, name a role they could step into if any, and press the box in the 9-box grid that matches their potential (rows) against their performance (columns).



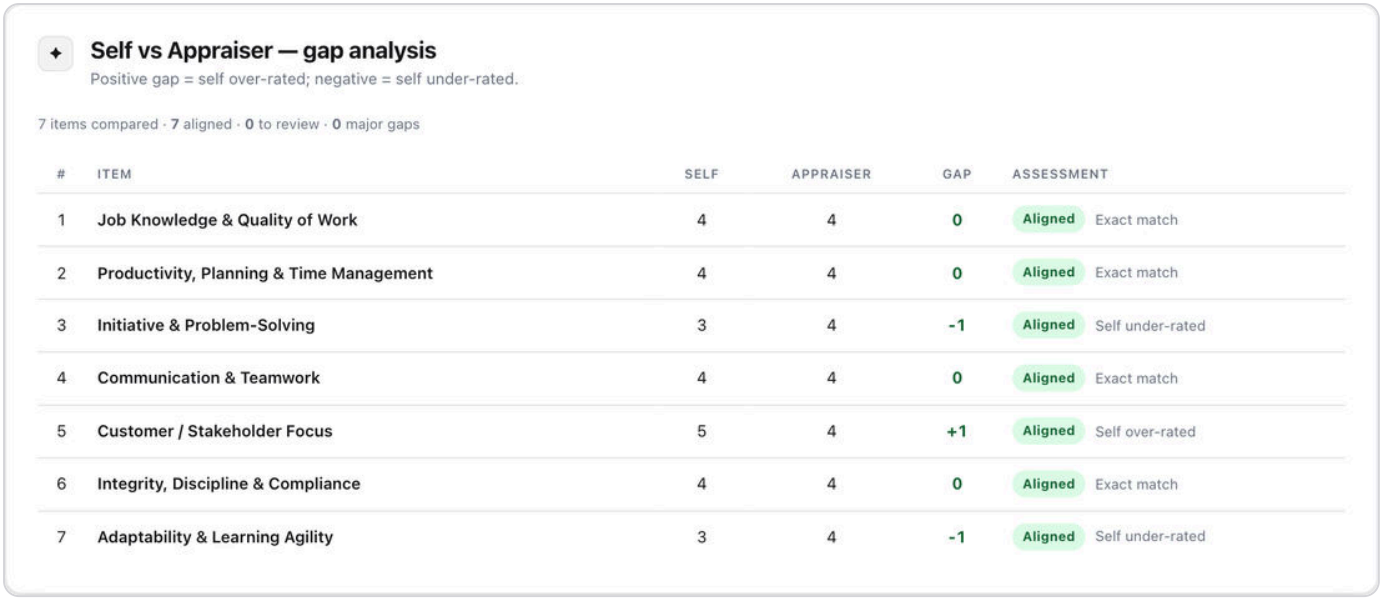
6. **E · Reviewer comment**: your overall feedback. The staff member sees it after you submit.
7. Press **Submit assessment** and confirm.



Compare your scores with theirs

After you submit, the page shows **Self vs Appraiser — gap analysis**: their score, yours, and the difference for each item.

- A **positive** gap means they rated themselves higher than you did. A **negative** gap means lower.
- **Aligned**: 1 point apart or less. **Review**: 2 apart. **Major gap**: 3 or more apart.



Self vs Appraiser — gap analysis

Positive gap = self over-rated; negative = self under-rated.

7 items compared · **7** aligned · **0** to review · **0** major gaps

#	ITEM	SELF	APPRAISER	GAP	ASSESSMENT
1	Job Knowledge & Quality of Work	4	4	0	Aligned Exact match
2	Productivity, Planning & Time Management	4	4	0	Aligned Exact match
3	Initiative & Problem-Solving	3	4	-1	Aligned Self under-rated
4	Communication & Teamwork	4	4	0	Aligned Exact match
5	Customer / Stakeholder Focus	5	4	+1	Aligned Self over-rated
6	Integrity, Discipline & Compliance	4	4	0	Aligned Exact match
7	Adaptability & Learning Agility	3	4	-1	Aligned Self under-rated

Until the staff member responds, and before HR signs it off, you can still change your ratings: make the changes and press **Update assessment**. After that, the review is closed for you.

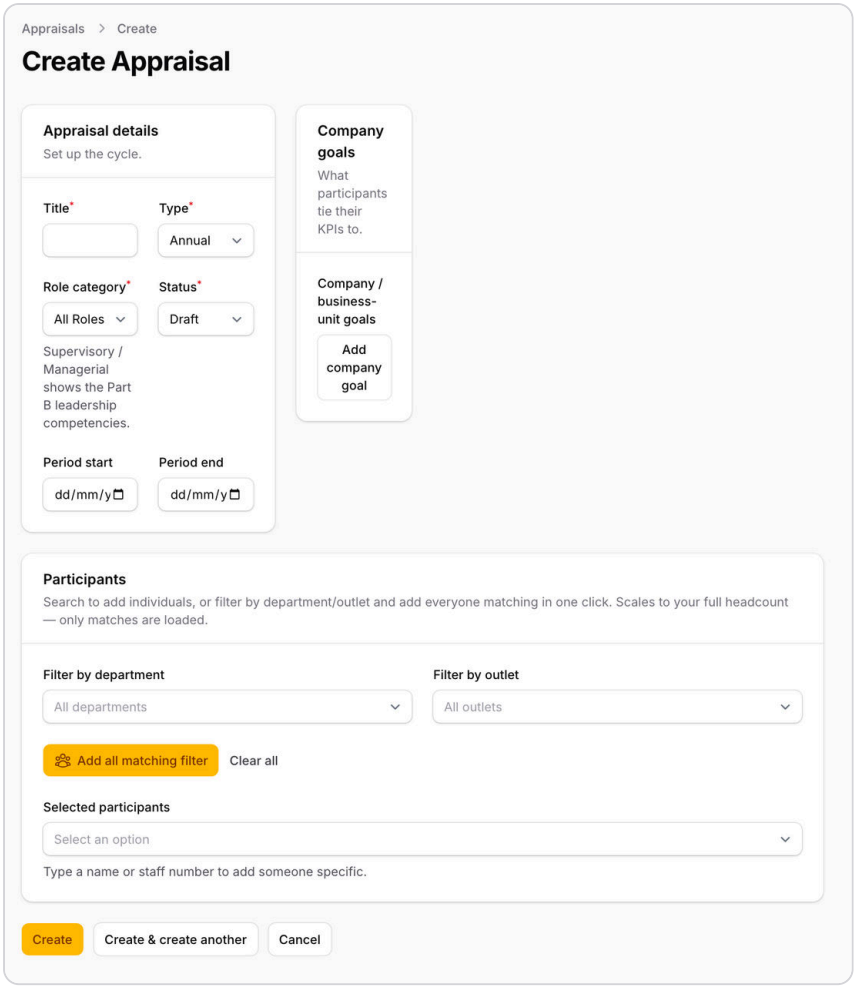
APPRAISAL

Set up an appraisal round

For: HR

An appraisal round is one review period for a group of staff, for example "Annual appraisal 2026". You set it up in the admin screens: open the Appraisal web address with **/admin** at the end and sign in with your company account. You need the HR or super admin role.

1. In the menu on the left, under **Appraisal**, press **Appraisals**, then **New appraisal** at the top right.
2. Under **Appraisal details**:
    - **Title**: the name staff will see.
    - **Type**: Annual, Mid-Year, Quarterly, Probation / Confirmation or Other.
    - **Role category**: All Roles or Supervisory / Managerial Roles. Today this only groups results in the **Variance Report**. Whether a person also rates the leadership behaviours is decided by their staff grade (see "Staff grades, departments and outlets").
    - **Status**: leave it on **Draft** while you prepare. Staff see the round only when it is **Active**.
    - **Period start** and **Period end**: the months being reviewed.
3. Under **Company goals**, press **Add company goal** for each goal staff can link their KPIs to. Give each a **Ref #** (1, 2, 3...) and the **Objective (English)**. Open **Translations** to add the same goal in other languages; leave them blank to show the English.
4. Under **Participants**, choose who takes part:
    - Pick a department or outlet in **Filter by department** or **Filter by outlet**, then press **Add all matching filter**.
    - Or type a name or staff number in **Selected participants** to add one person.
    - **If you add nobody, everyone takes part:** each staff member is added the first time they open the Appraisal page.
5. Press **Create**.



When you are ready, open the round again (**Edit**), set **Status** to **Active** and press **Save changes**. Then tell staff to open their appraisal.

To add someone later, open the round and press **Add participant** in the **Participants** list at the bottom.

Setting **Status** to **Closed** stops new self-appraisals and reviews from appearing on staff screens. What has already been submitted stays.

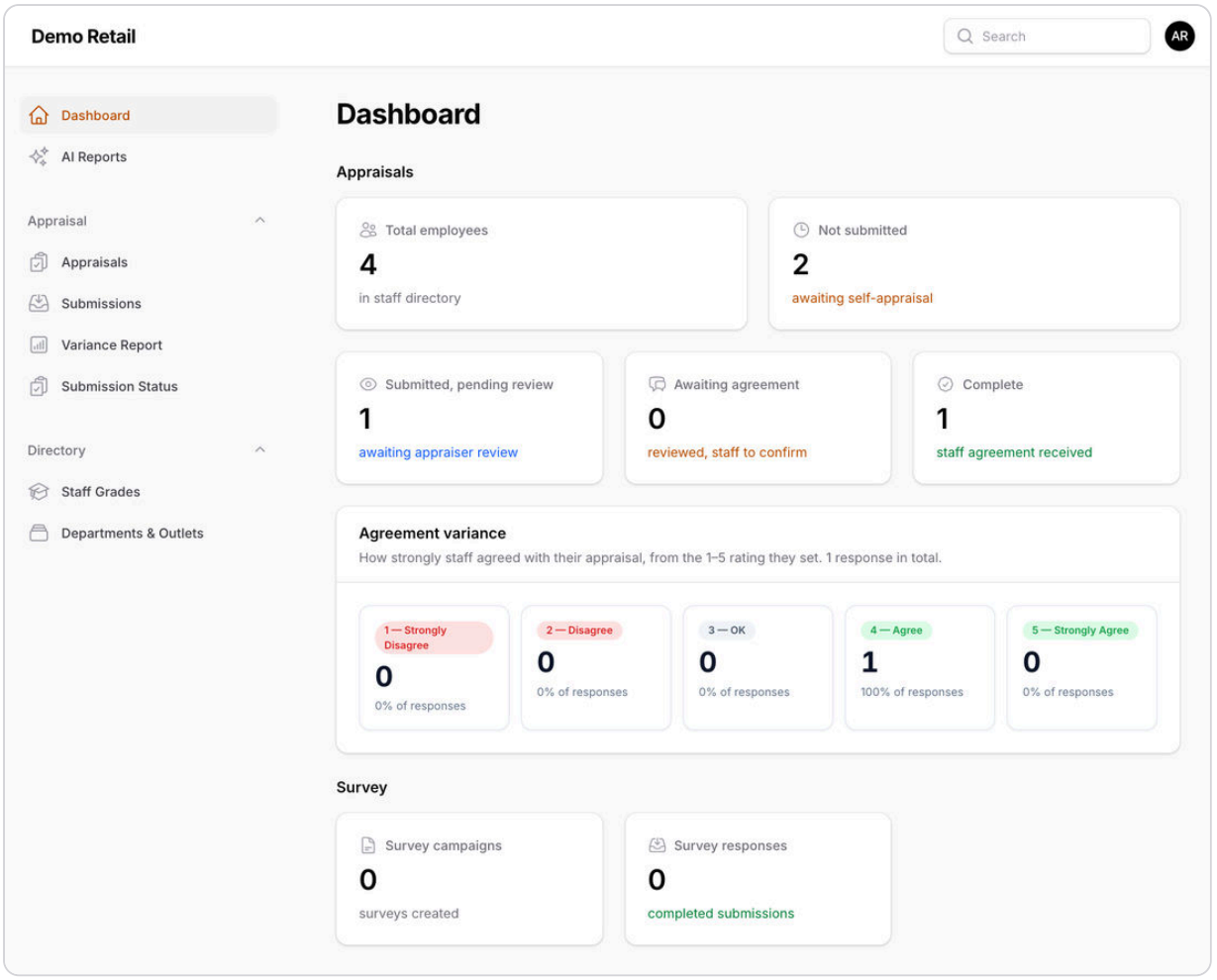
APPRAISAL

See who has finished

For: HR

Dashboard

Dashboard, at the top of the menu, counts everyone in the staff directory by stage: **Not submitted**, **Submitted, pending review**, **Awaiting agreement** (the appraiser has rated, the staff member has not answered yet) and **Complete**. **Agreement variance** shows how many staff answered each point from **1 — Strongly Disagree** to **5 — Strongly Agree**.

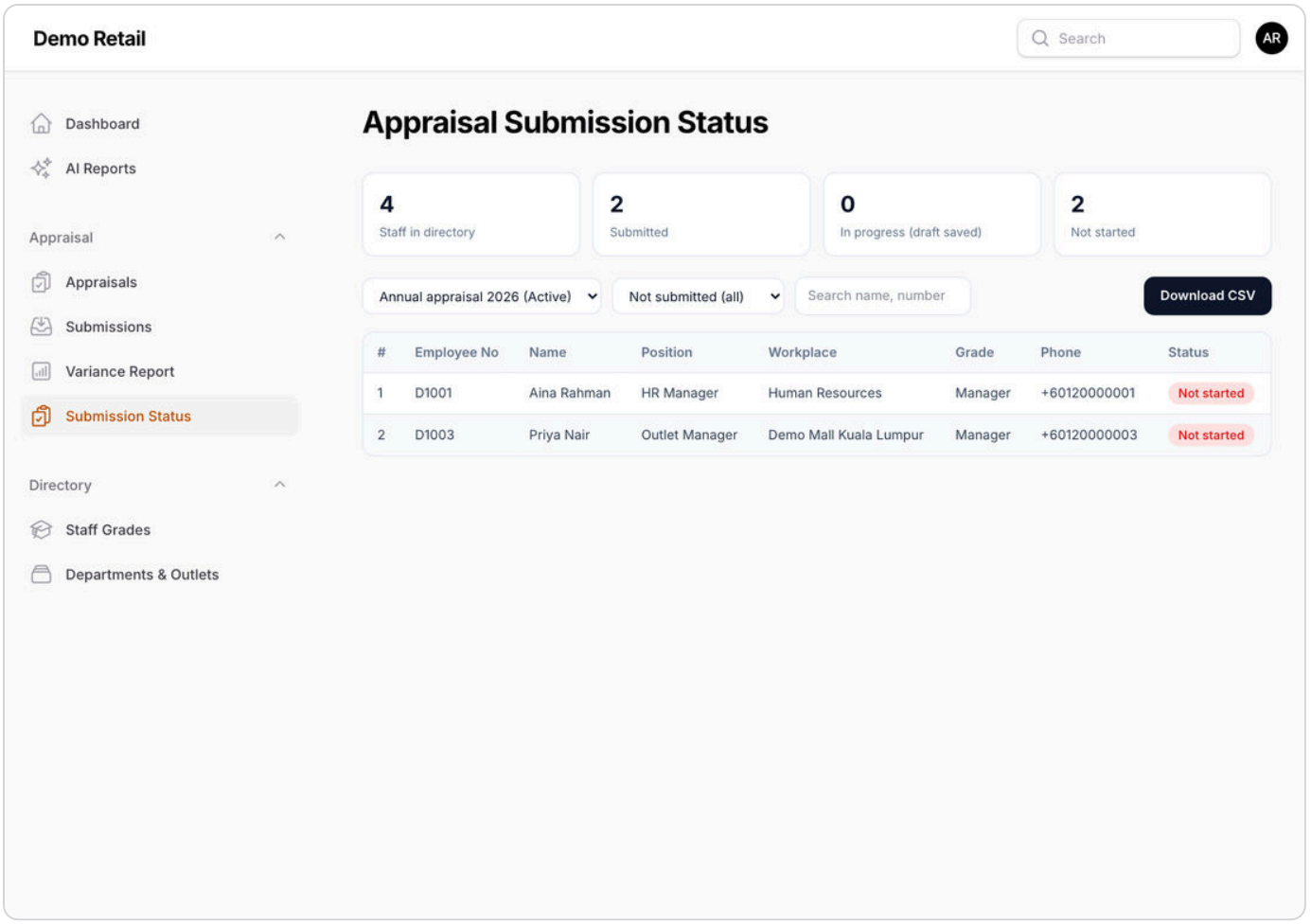


Who still has to start

Submission Status lists every person in the staff directory against the active round, including people who have never opened the Appraisal page.

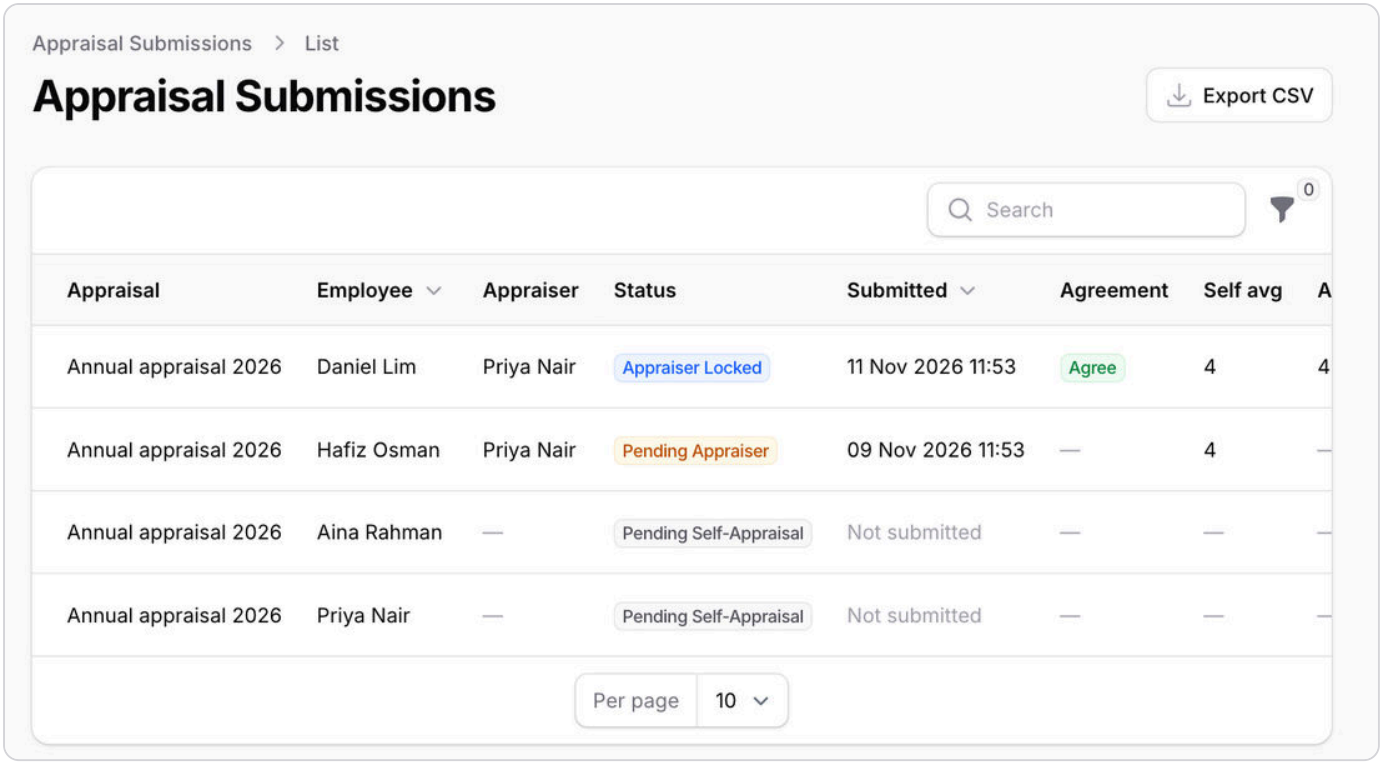
1. Pick the round in the first drop-down.

2. Pick who to show: **Not submitted (all)**, **Not started only**, **In progress only** (a draft is saved), **Submitted only** or **Everyone**.
3. Type in **Search name, number** to find one person.
4. Press **Download CSV** to get the list as a spreadsheet file, for example to send reminders.



Every submission

Submissions lists every participant with their appraiser, stage, the date they submitted, whether they agreed, and both averages. Press **View** on a row to read the whole appraisal. **Export CSV** downloads the list.



Where self-scores and manager scores differ

Variance Report shows, for each competency, how many reviews were **Aligned** (1 point apart or less), to **Review** (2 apart) or a **Major Gap** (3 or more apart). Press a number to see the staff in it. The agreement variance table from the dashboard is repeated at the top.

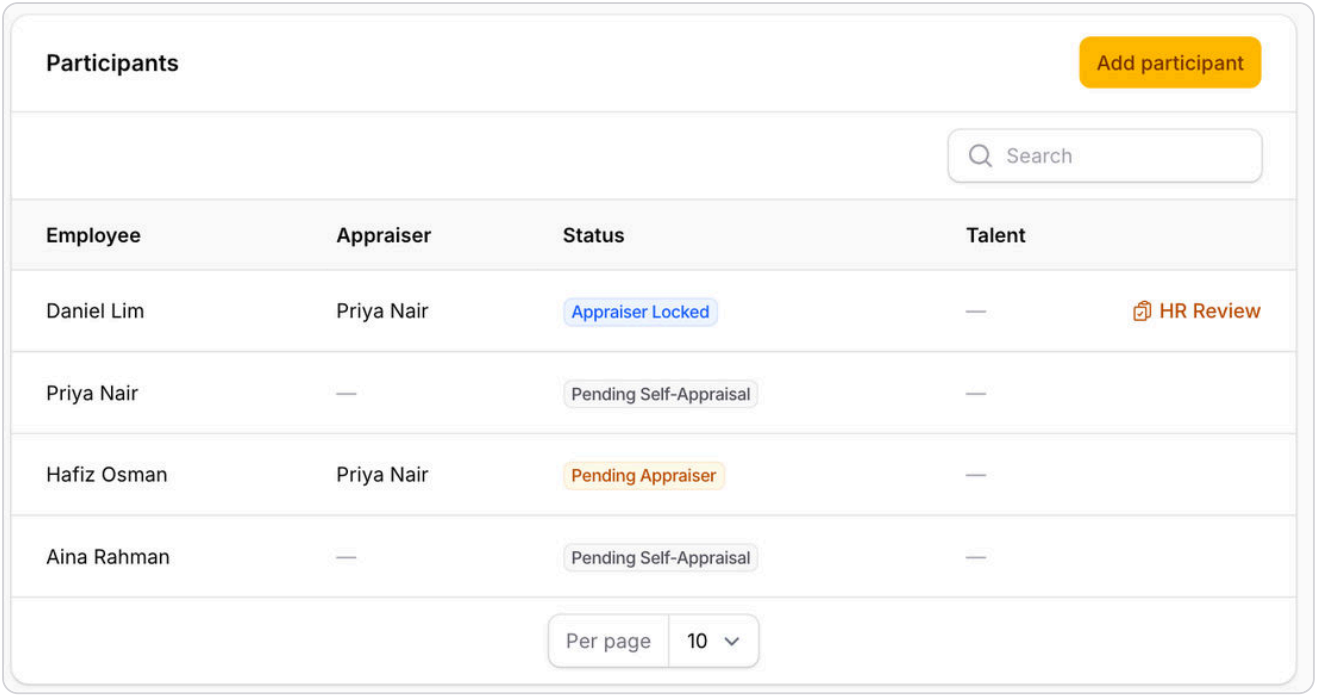
APPRAISAL

Sign off an appraisal

For: HR

You can sign off once the appraiser has submitted (the status shows **Appraiser Locked**). It is better to wait until the staff member has answered whether they agree: their answer shows in the **Agreement** column of **Submissions**. Signing off also closes the appraisal to the appraiser.

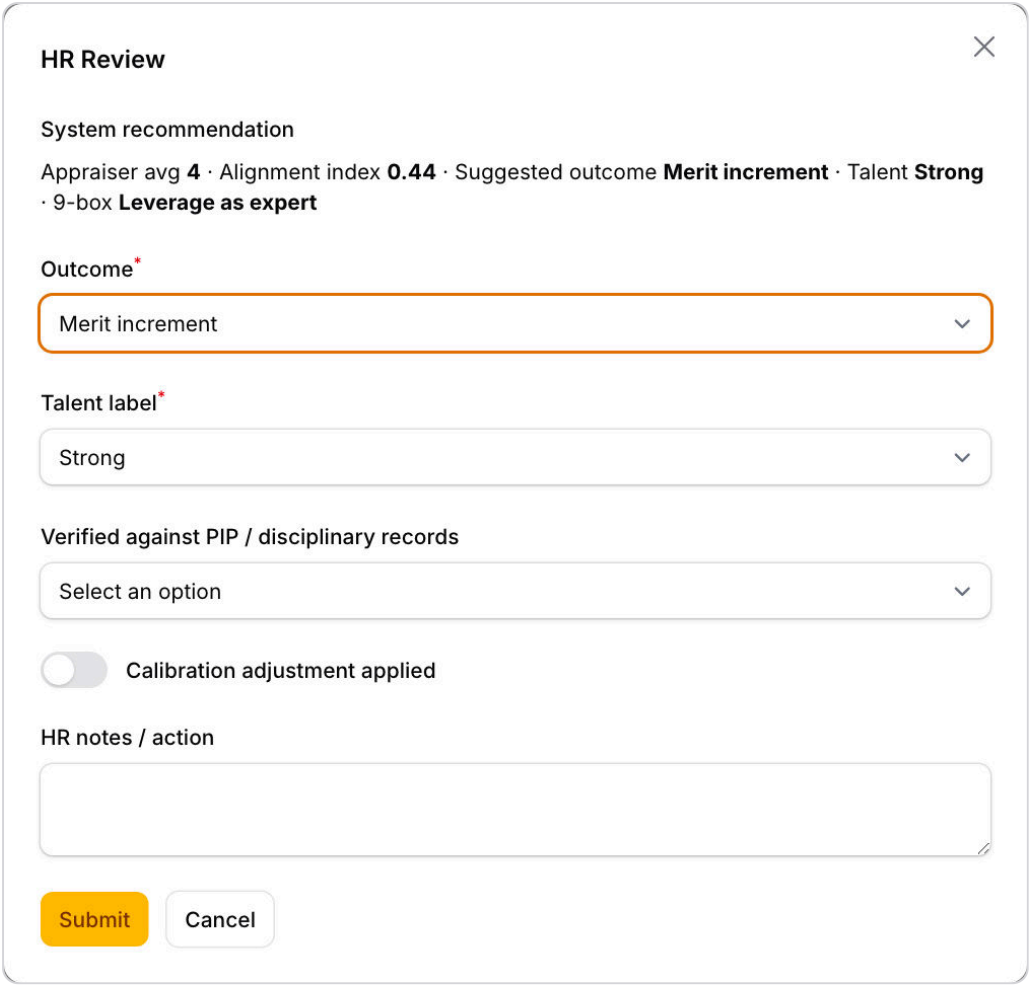
1. Press **Appraisals** in the menu, then **Edit** next to the round.
2. Scroll down to **Participants**. Press **HR Review** on the person's row.



3. **System recommendation** at the top suggests an outcome, a talent label and a 9-box action, worked out from the appraiser's average score and how far the two sets of scores differ. The fields below are filled in with these suggestions. Change any you disagree with:
    - **Outcome**: for example Merit increment, Bonus eligible, Promotion recommended, or Performance Improvement Plan (PIP).
    - **Talent label**: Star, Strong, Solid, Watch or At Risk.
    - **Verified against PIP / disciplinary records**: N/A, Checked, no conflict, or Conflict — escalated.
    - **Calibration adjustment applied**: switch it on only if you change the rating after comparing across teams, then give the **Adjusted rating** and the reason.

- **HR notes / action**: anything to follow up.

4. Press **Submit**. The appraisal is marked **Completed**, with your name and the date.



Print the summary

After sign-off, a **Summary** button appears on the person's row. It opens a one-page summary in a new tab: details, both sets of scores and the gaps, the staff member's response, the HR outcome and the dates of each step. Press **Print / Save PDF** to print it or save it as a PDF.



Performance Appraisal Summary

Print / Save PDF

Annual appraisal 2026 · Annual · All Roles

Employee & Review Details

Employee	Daniel Lim	**Staff no.**	D1002
Position	Sales Advisor	**Department**	—
Outlet	Demo Mall Kuala Lumpur	**Appraiser**	Priya Nair

Scores & Gap Analysis

4	4	0.44
Self avg	Appraiser avg	Alignment index

Item	Self	Appraiser	Gap
Increase my monthly sales	4	4	0
Keep customer feedback scores high	5	4	+1
Job Knowledge & Quality of Work	4	4	0
Productivity, Planning & Time Management	4	4	0
Initiative & Problem-Solving	3	4	-1
Communication & Teamwork	4	4	0
Customer / Stakeholder Focus	5	4	+1
Integrity, Discipline & Compliance	4	4	0
Adaptability & Learning Agility	3	4	-1

The alignment index is the average distance between the two sets of scores. 0 means they match on every item.

APPRAISAL

Staff grades, departments and outlets

For: HR

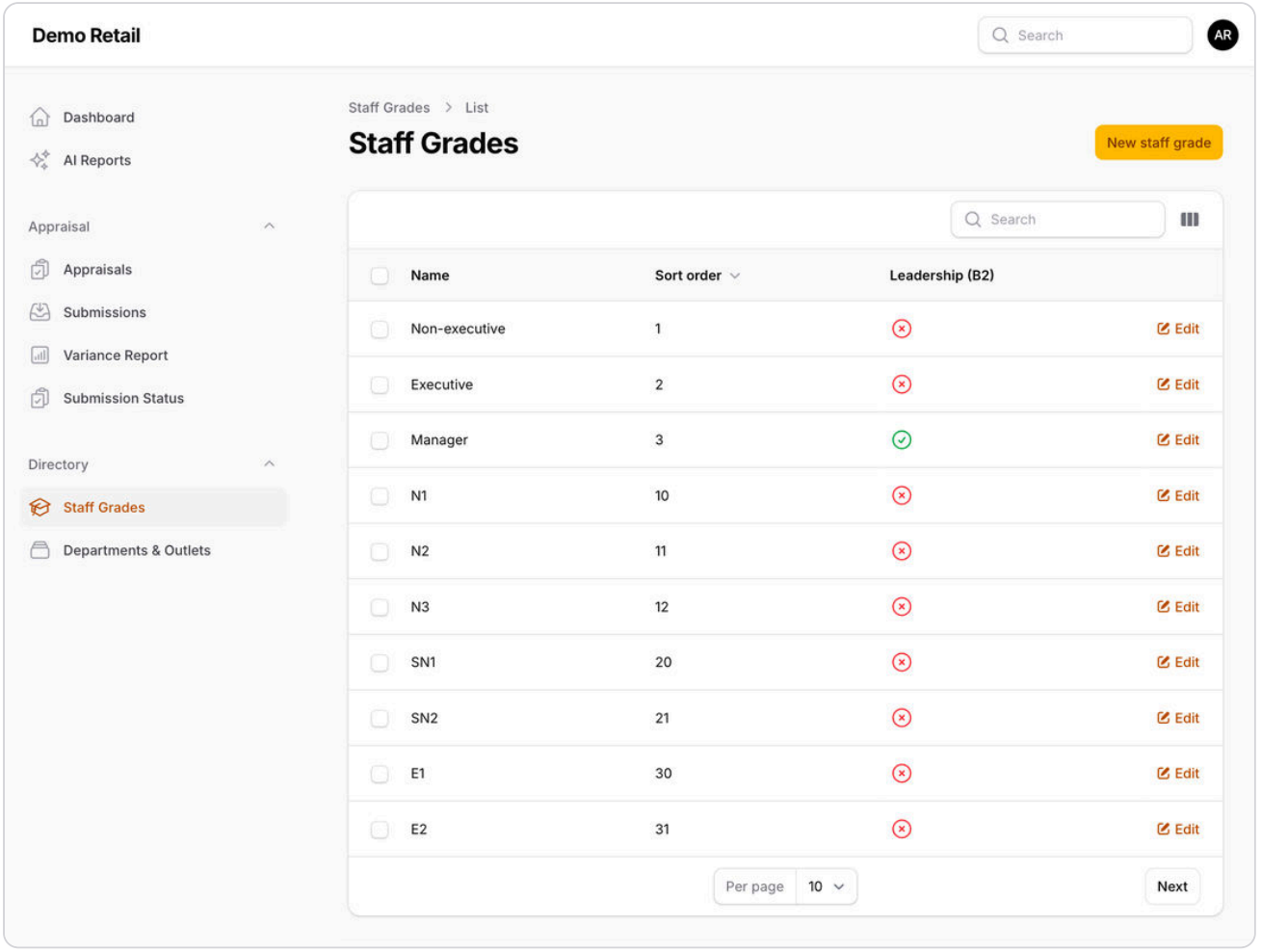
These two lists, under **Directory** in the menu, feed the drop-downs staff see on **Confirm your details**.

Staff grades

A staff grade decides whether a person also rates the 5 leadership behaviours (part B2) on top of the 7 core ones.

1. Press **Staff Grades**, then **New staff grade**, or **Edit** on an existing one.
2. Give it a **Name** and a **Sort order** (the order it appears in the drop-down).
3. Switch on **Can view leadership competencies (B2)** for supervisor and manager grades.
4. Save.

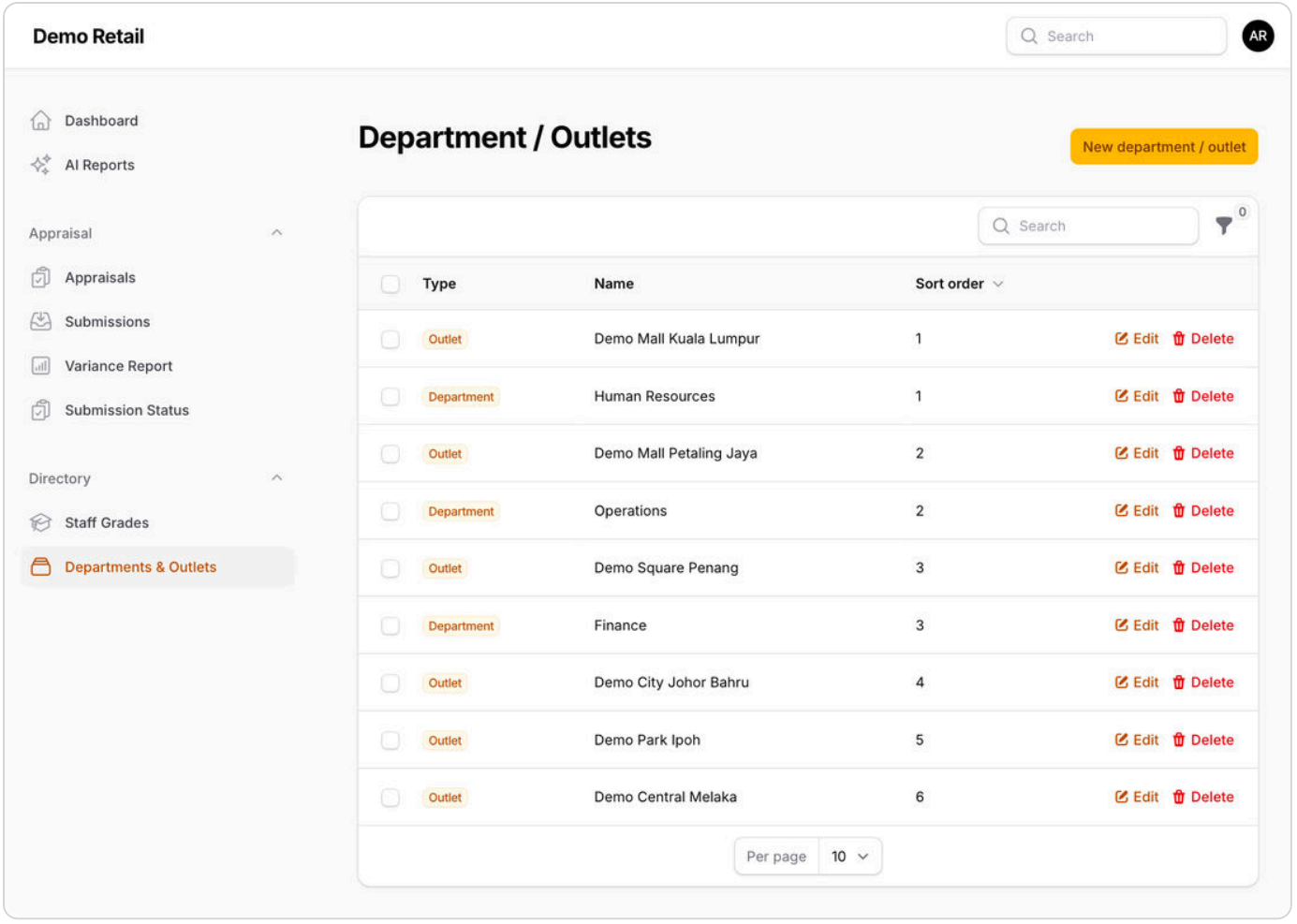
A tick in the **Leadership (B2)** column shows which grades have it switched on.



Departments and outlets

Staff pick their department (if they work at headquarters) or outlet (if they work at an outlet) from this list.

1. Press **Departments & Outlets**, then **New department / outlet**.
2. Choose the **Type** (Department or Outlet), type the **Name** and a **Sort order**.
3. Save. Use **Edit** or **Delete** on a row to change or remove one.



USER GUIDE · VERSION 1

Competency test

Product knowledge and skills certification for retail staff. Staff sit online tests on their phone, and examiners build the tests, mark written answers and read the results.

1. What it is for
2. Take a test
3. See your result
4. Add questions to the question bank
5. Build and publish a test
6. Mark answers and release results
7. Read the results and reports
8. Give someone examiner or viewer access

What it is for

For: Everyone

Competency test checks what your staff know: product knowledge, customer service, cash handling, or anything else your company trains them on. An examiner keeps a bank of questions, puts tests together from it and sends staff the link to each test. Staff take the test on their phone, one question at a time. Most answers are scored by the system; written answers are marked by an examiner. Staff see their score once the examiner releases it.

Who uses it

- **Staff** (on screen, the test calls them a candidate) open a test link, answer the questions and later see their result. Staff need no role.
- **Examiner** writes questions, builds and publishes tests, marks written answers, releases results and reads the reports. An Examiner can also give other people a role.
- **Viewer** can open the reports and lists but cannot change anything or mark answers. This suits a manager who only reads results.
- A full-access role exists for the IT team. It cannot be given from the screens.

What it needs from other modules

- Sign-in uses your company's shared sign-in service: the same phone number and password you use for the Portal.
- Staff do not come from Master data. A person appears in Competency test the first time they sign in to it, or when an examiner adds them under **Users**.
- There is no message or email when a test is ready or a result is released. The examiner sends staff the test link and tells them when results are out.

COMPETENCY TEST

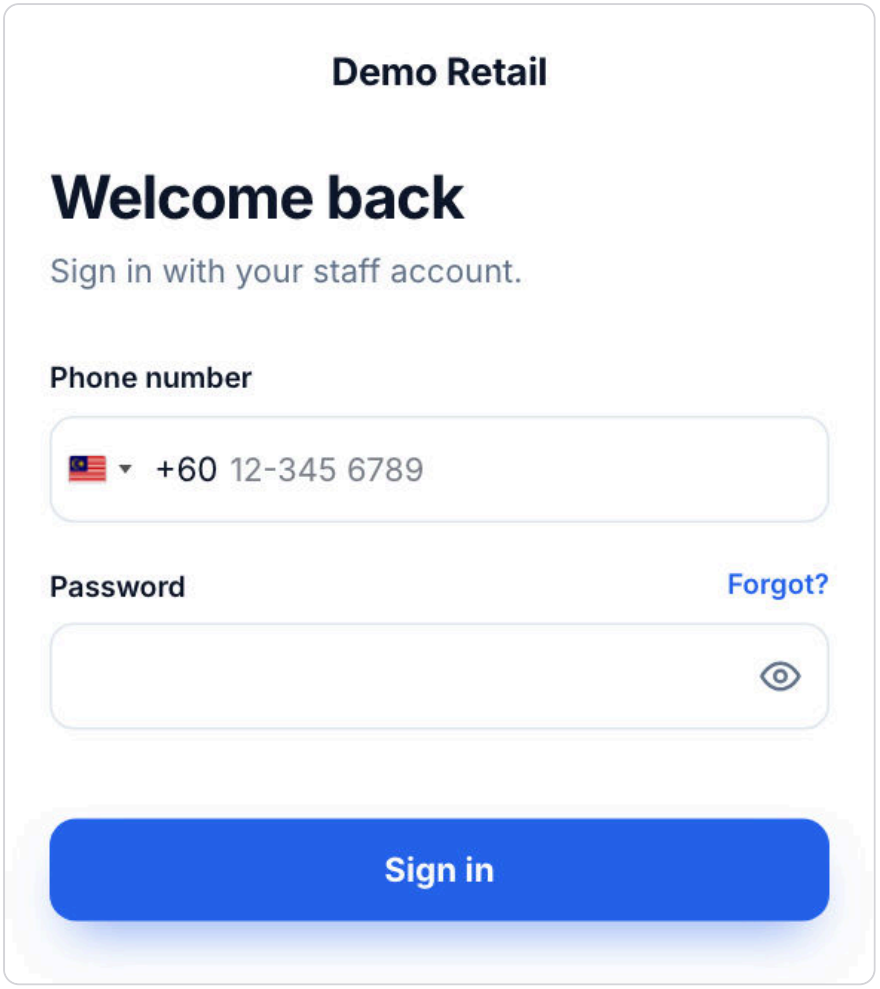
Take a test

For: Staff

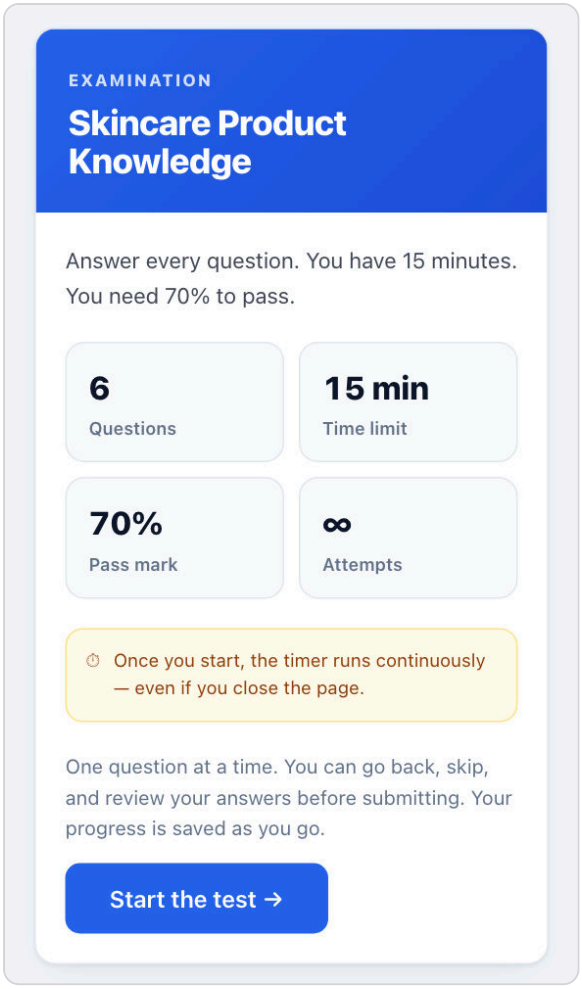
Each test has its own link. Your examiner sends it to you, for example in a chat message. There is no list of tests to choose from: if you open Competency test from the Portal without a link, you see a "You're signed in" page and nothing else.

Open the test

1. Tap the test link your examiner sent you.
2. If the sign-in page appears, type your **Phone number** and **Password** (the same ones you use for the Portal) and tap **Sign in**. You land on the test after signing in.



3. Read the start screen. It shows the number of **Questions**, the **Time limit**, the **Pass mark** and the number of **Attempts** you are allowed. On a test that allows one try only, the **Attempts** box still shows ∞ today. Trust what your examiner told you: you get one try.
4. Tap **Start the test →** when you are ready. If the test has a time limit, the clock starts now and keeps running even if you close the page.

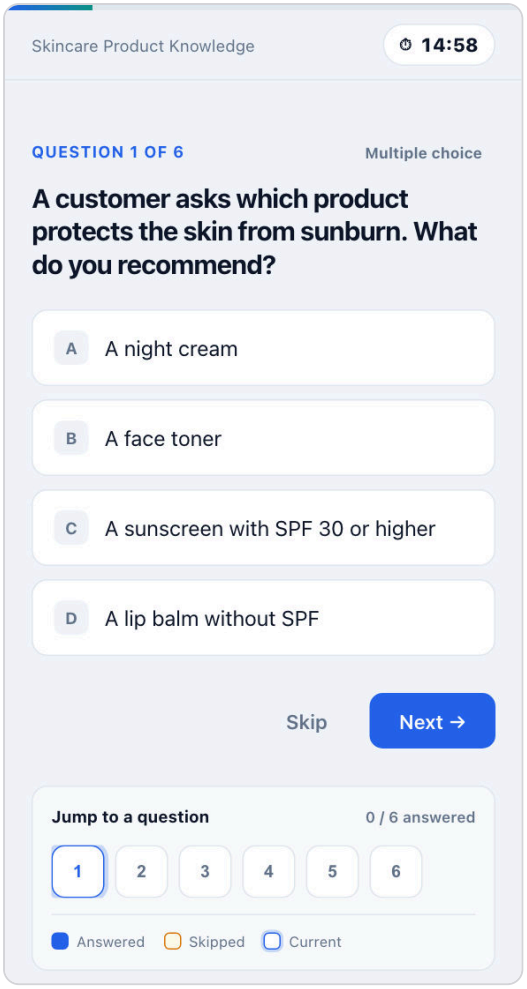


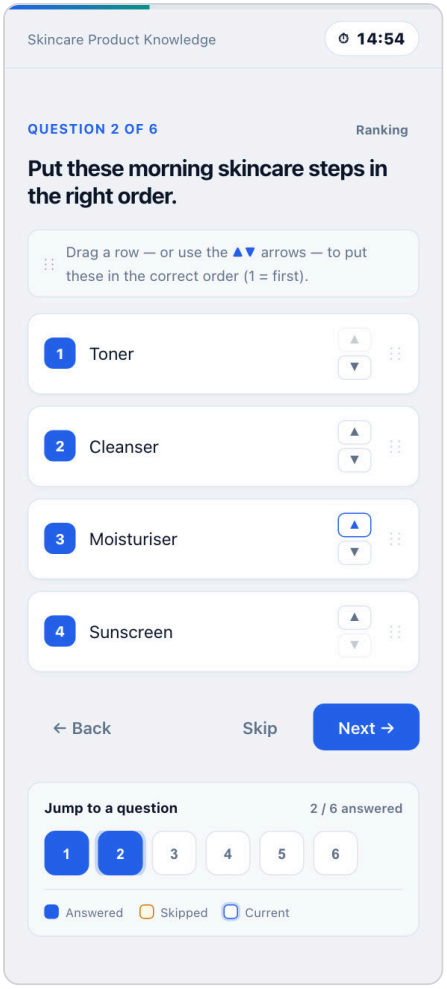
If the test is offered in more than one language, you choose your language on this screen first. You cannot change it after you start.

Answer the questions

You see one question at a time. The clock at the top right counts down when there is a time limit.

- **Multiple choice**: tap one answer. The next question opens by itself.
- **True / False**: tap **TRUE** or **FALSE**. The next question opens by itself.
- **Ranking**: put the rows in the right order, 1 first. Drag a row, or tap the ▲ and ▼ arrows on the right of each row. Then tap **Next →**.
- **Open-ended**: type your answer in the box, then tap **Next →**. An examiner marks this answer after the test.

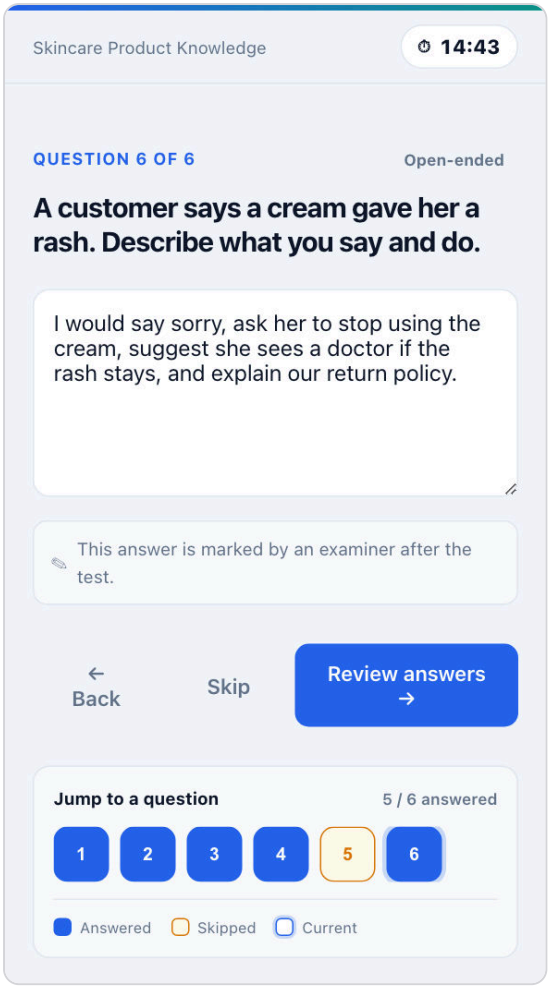

Skincare Product Knowledge
14:58
QUESTION 1 OF 6
Multiple choice
A customer asks which product protects the skin from sunburn. What do you recommend?
A A night cream
B A face toner
C A sunscreen with SPF 30 or higher
D A lip balm without SPF
Skip
Next →
Jump to a question
0 / 6 answered
1 2 3 4 5 6
Answered
Skipped
Current



Other buttons under each question:

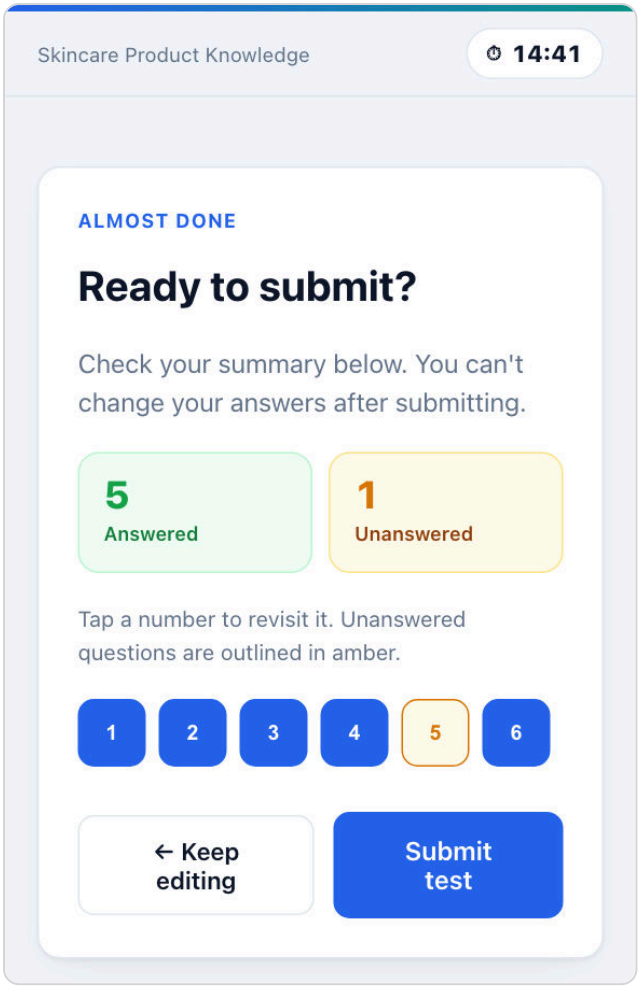
- **← Back** goes to the previous question.
- **Skip** leaves a question for later. It only shows when the examiner allows skipping.
- **Jump to a question** shows a numbered box for every question. Blue means answered, amber means skipped. Tap a number to go to that question.

Your answers are saved as you go. If your phone dies or you close the page, open the test link again: you continue where you stopped.

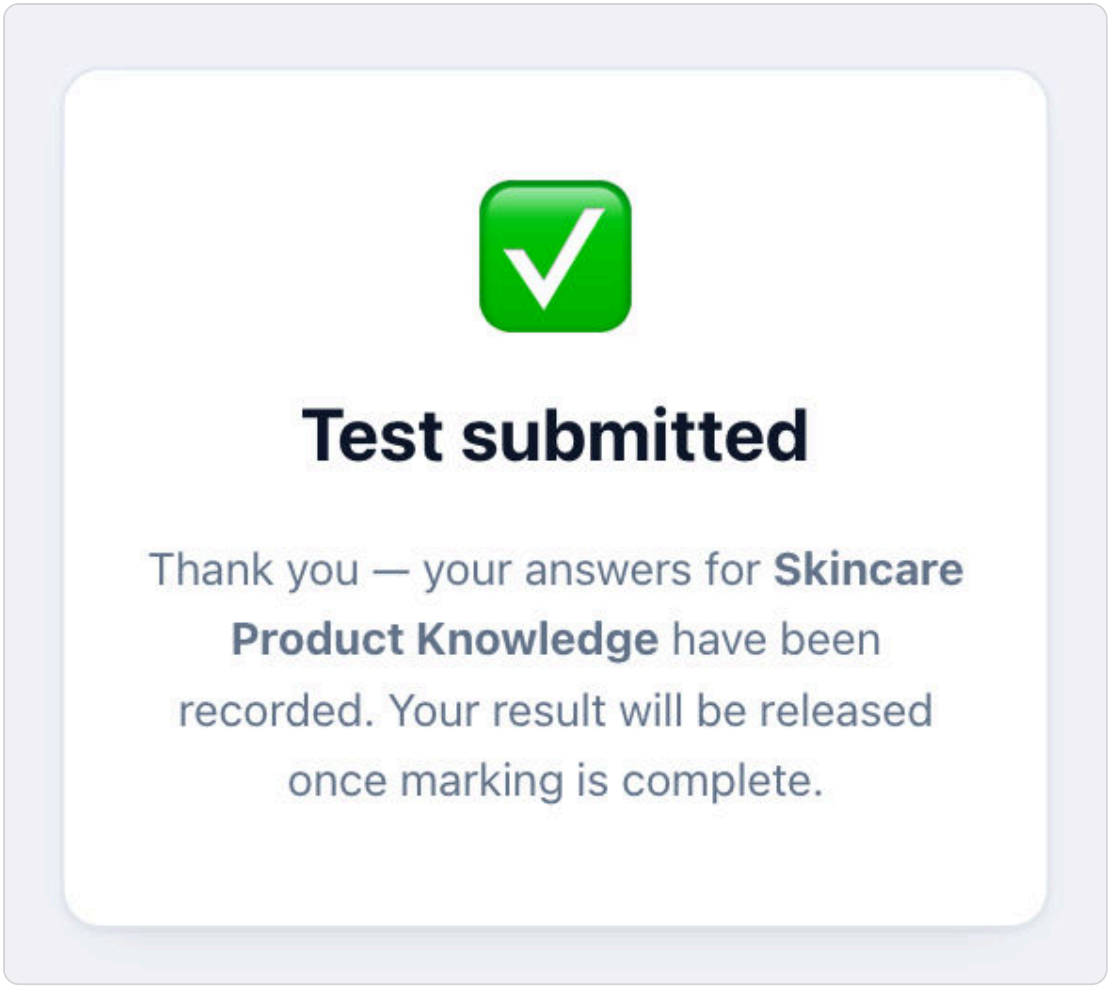


Submit

1. On the last question, tap **Review answers →**.
2. Check the summary: how many questions are **Answered** and **Unanswered**. Unanswered questions are outlined in amber. Tap a number to go back to it, or tap **← Keep editing**.
3. Tap **Submit test**, then confirm. You cannot change your answers after this.



You see **Test submitted**. Your score does not show yet. It appears once the examiner has marked any written answers and released the results.



If time runs out before you submit, the test is submitted for you with the answers you gave.

COMPETENCY TEST

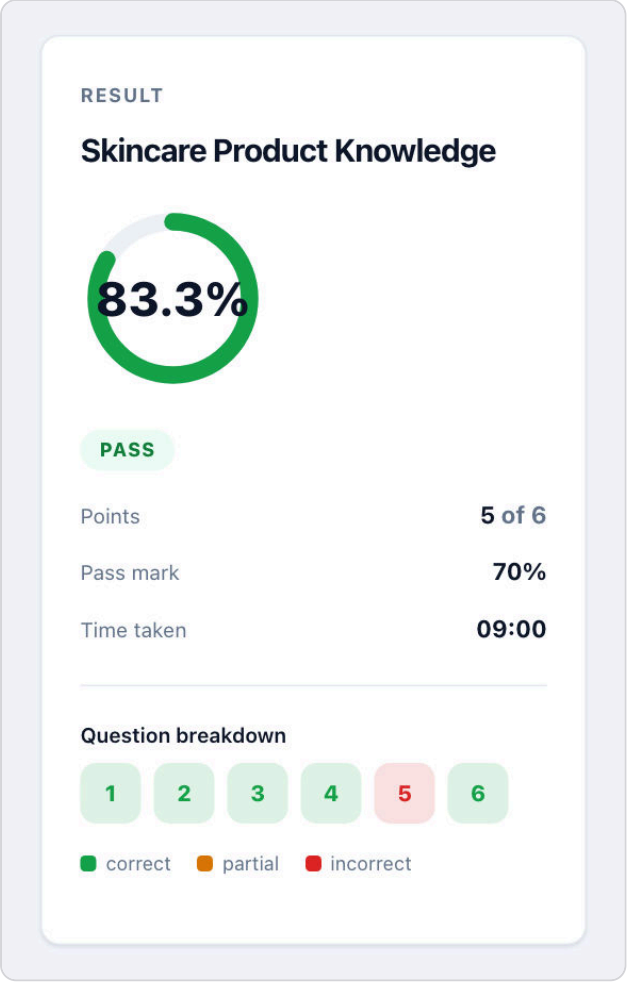
See your result

For: Staff

Your result shows only after the examiner releases it. You get no message when that happens; your examiner tells you.

1. Open the same test link you used to take the test.
2. Sign in if asked.

If the result has been released, you see your score, **PASS** or **FAIL**, your **Points**, the **Pass mark** and the **Time taken**.

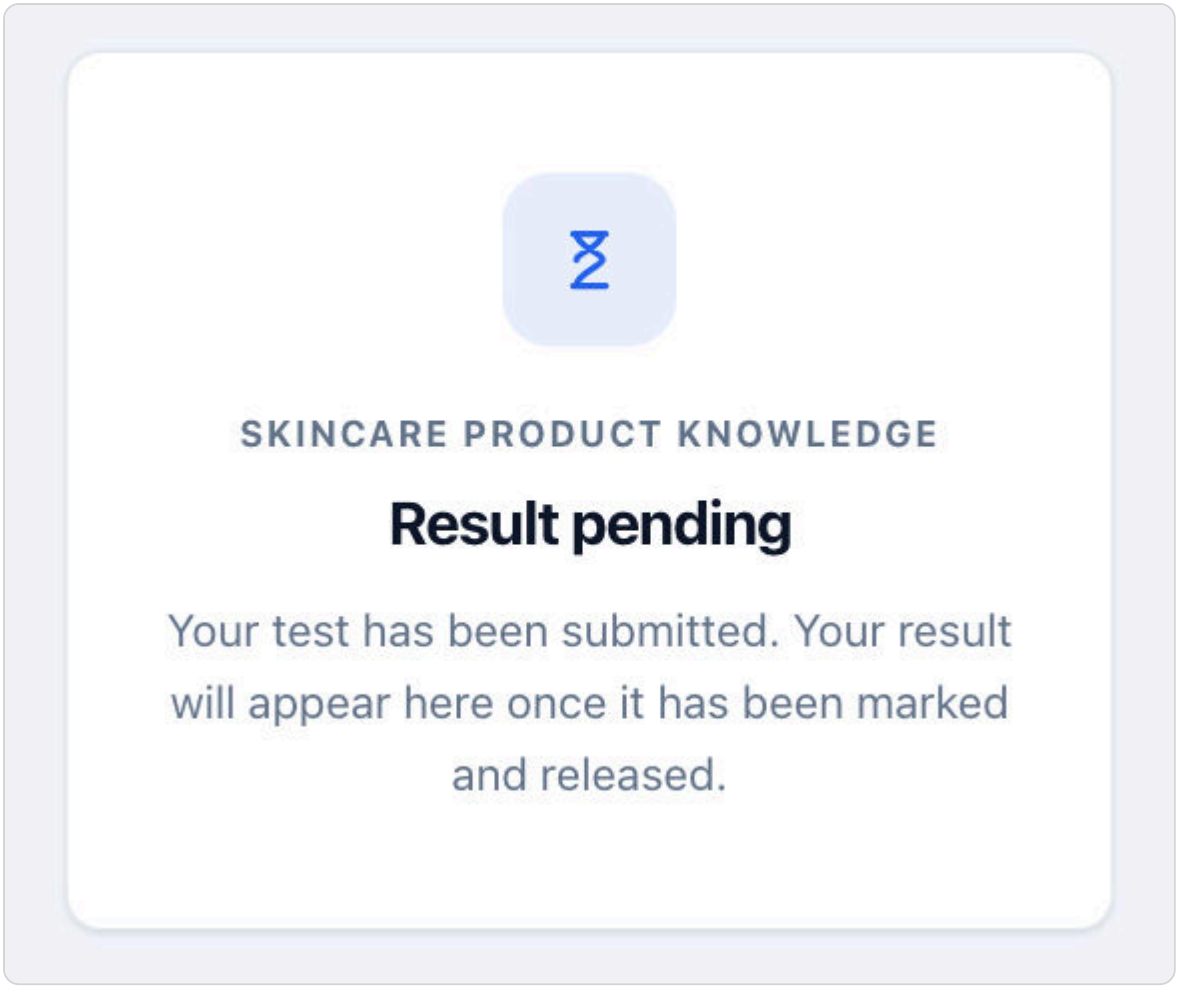


Question breakdown shows one box per question: green for correct, amber for partly correct, red for wrong. It does not show the right answer.

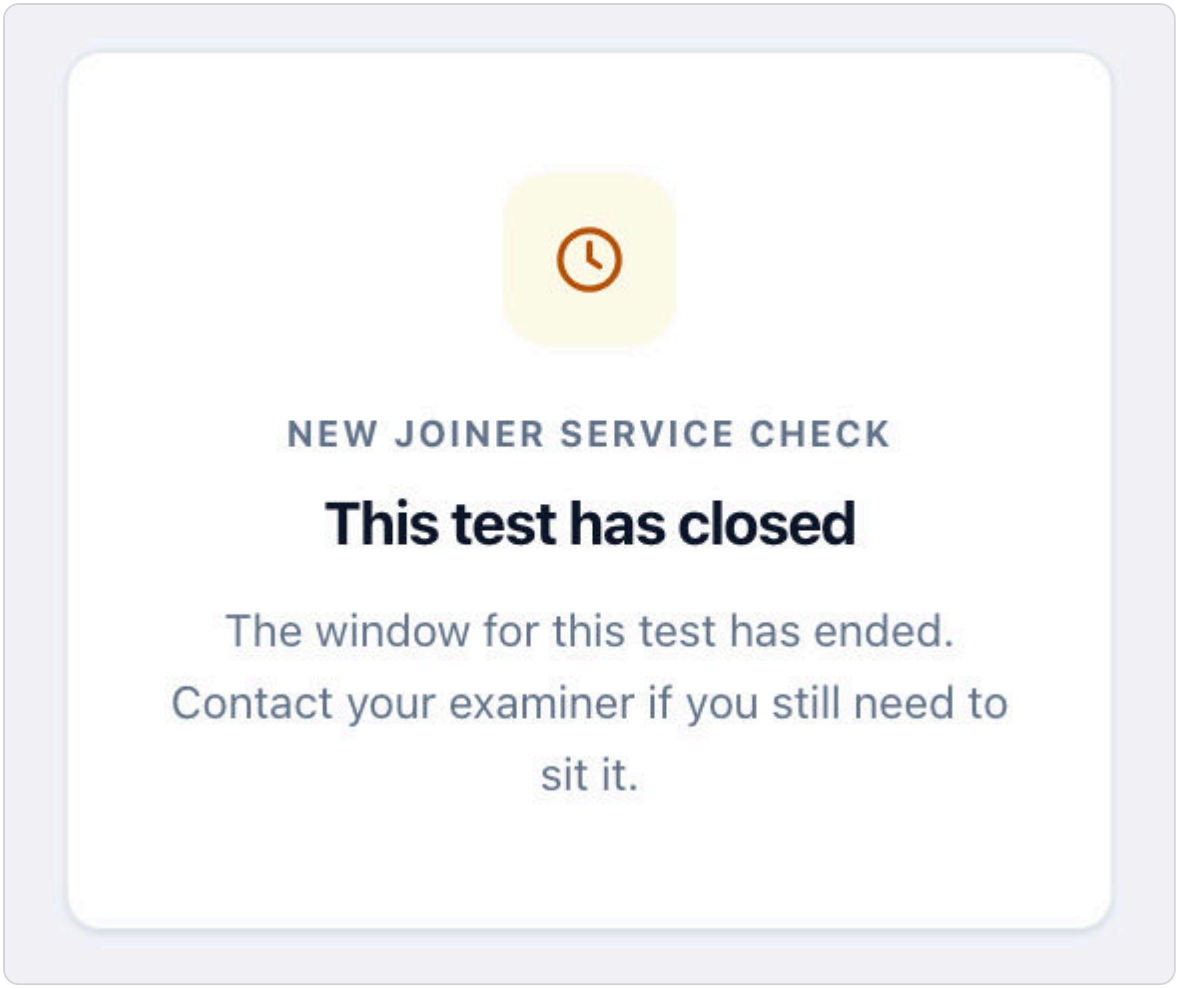
A ranking question can be partly correct: you get part of the point for each row in the right place. A written answer can get full, half or no marks.

If you see a different screen

- **Result pending**: you have submitted, but the examiner has not finished marking or has not released the results yet. Check again later.



- **This test has closed**: the test's time window is over. Once a test has closed, its link shows this message instead of your result, even if your result was released. Ask your examiner for your score.



- If you are allowed more than one try, opening the link again shows the start screen so you can take the test again. Your best try counts.

Add questions to the question bank

For: Examiner

Every test is built from the question bank. Write each question once; you can use it in many tests.

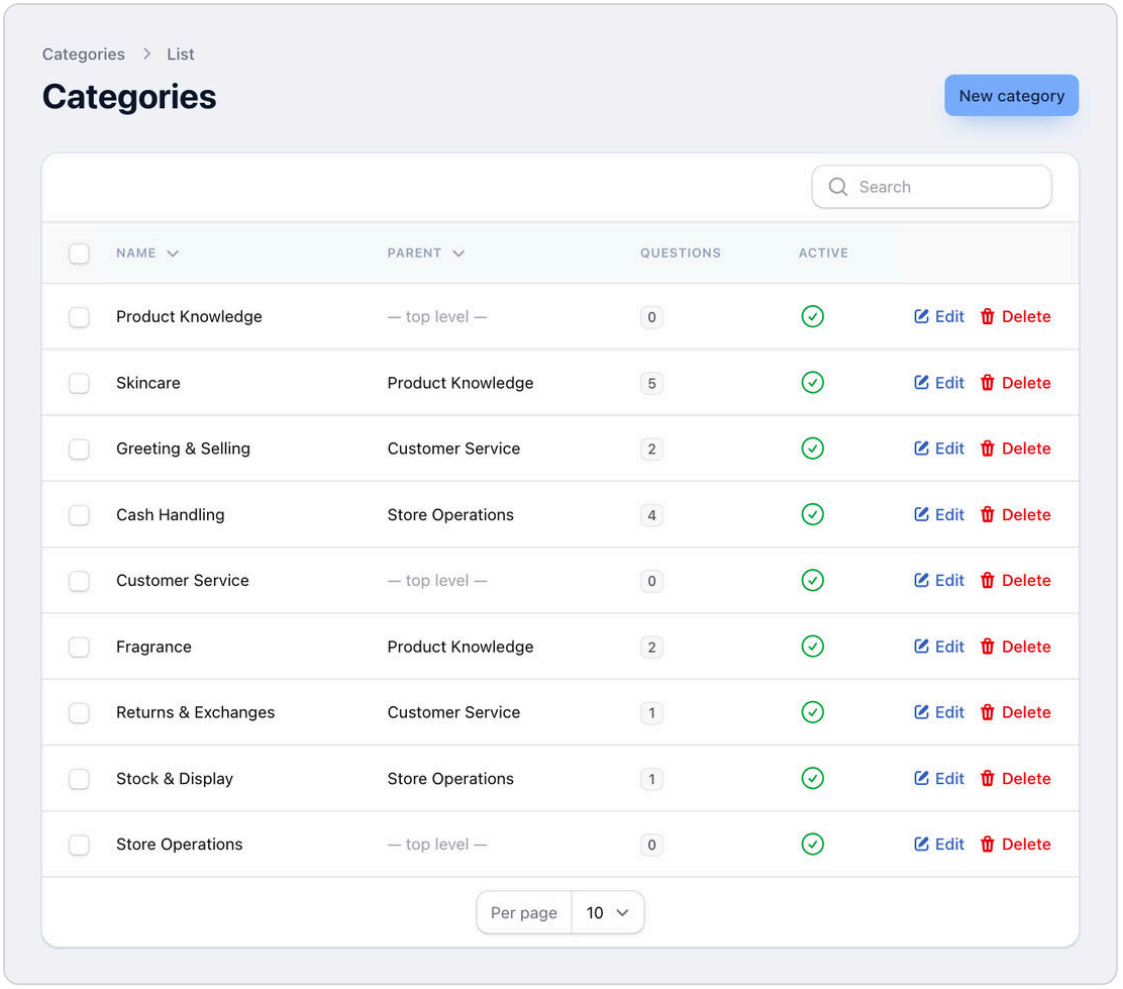
To reach the examiner screens, open Competency test and sign in. If you have a role, tap **Go to dashboard**. The menu is on the left.

Set up categories first

Categories group your questions, for example **Product Knowledge**, with sub-categories such as **Skincare** and **Fragrance** under it. A test can draw questions at random from a category, so file each question in the most specific one.

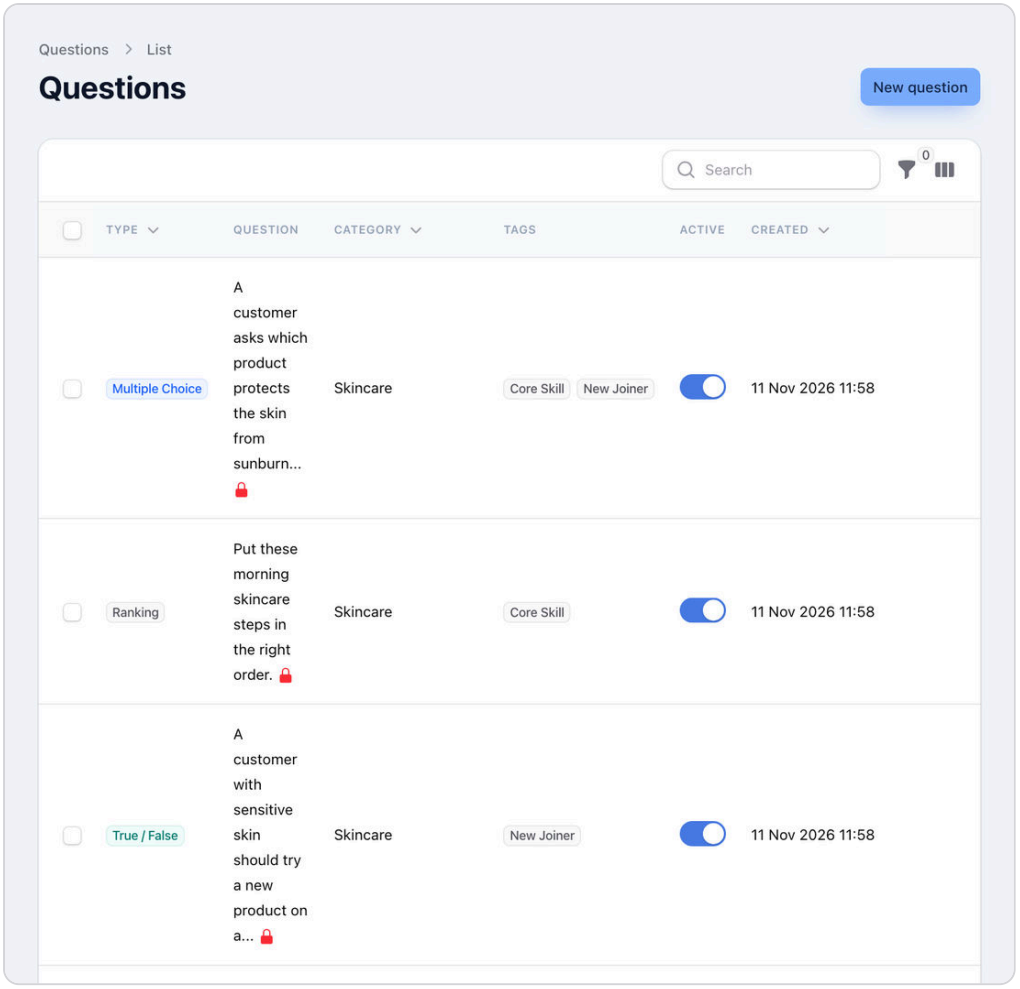
1. Open **Categories** under **QUESTION BANK** in the menu.
2. Press **New category**.
3. Type the **Name**. To make a sub-category, choose its **Parent category**. Leave it empty for a top-level category.
4. Press **Create**.

Categories go two levels deep: a category and its sub-categories.

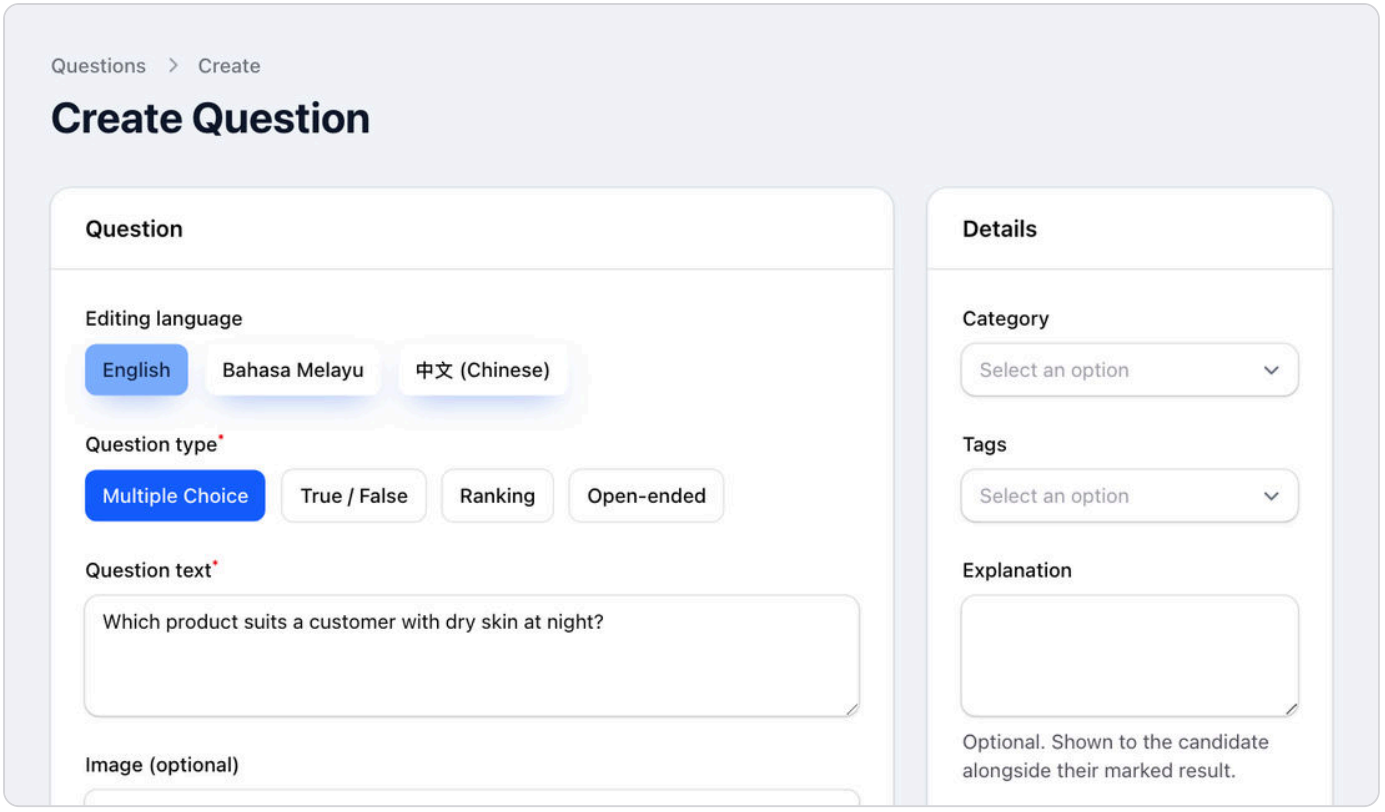


Write a question

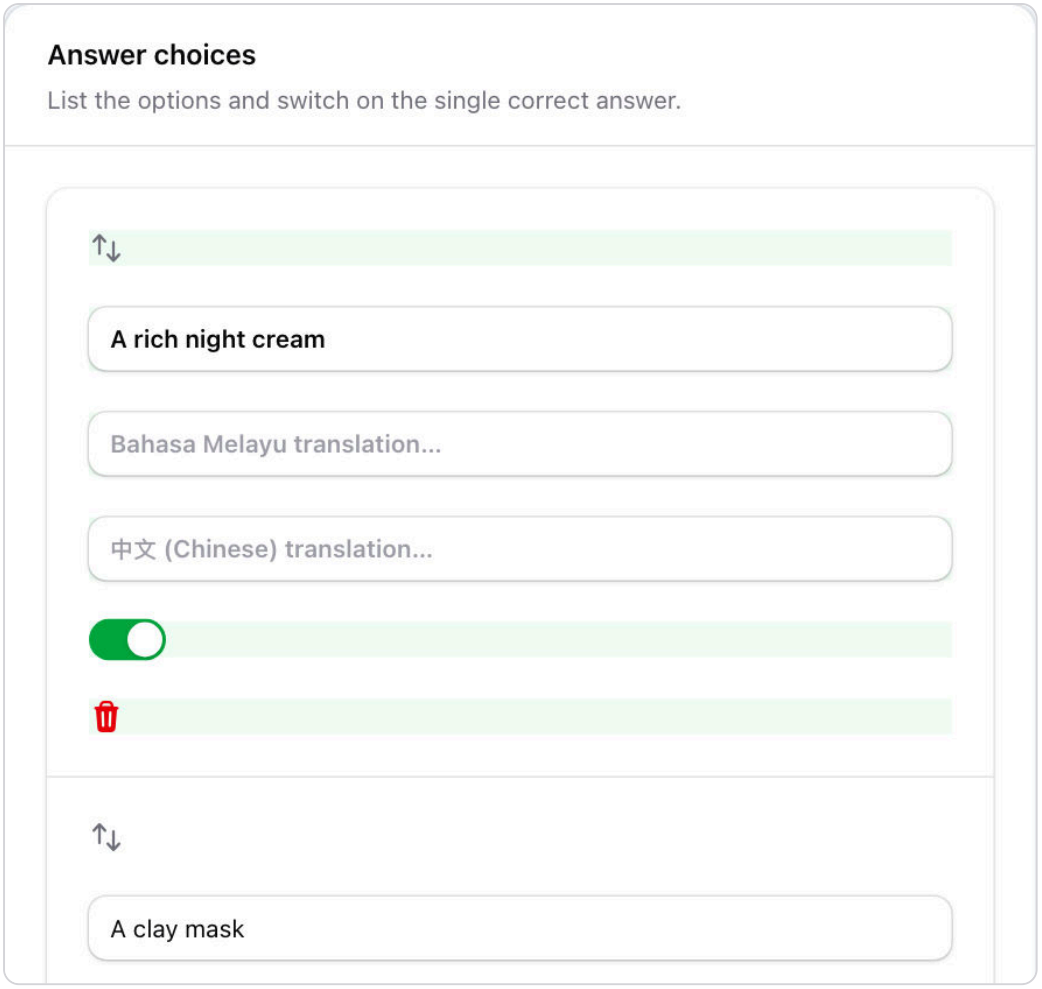
1. Open **Questions** under **QUESTION BANK**.
2. Press **New question** at the top right.



3. Choose the **Question type**: **Multiple Choice**, **True / False**, **Ranking** or **Open-ended**.
4. Type the **Question text**. You can add a picture under **Image (optional)**.
5. On the right, choose the **Category** and, if you use them, the **Tags** (labels such as "New Joiner" that cut across categories).



6. Fill in the answer part, which changes with the type:
    - **Multiple Choice**: type each choice under **Answer choices** and switch on the one correct answer. Press **Add choice** for more.
    - **True / False**: under **Correct answer**, choose **TRUE** or **FALSE**.
    - **Ranking**: type each item under **Answer choices** and set its **Correct position** (1 = first). Staff see the items mixed up.
    - **Open-ended**: write a **Model answer** and **Marking notes (for examiners)**. These help whoever marks the answers; staff never see them.
7. Press **Create**, or **Create & create another** to start the next question straight away.



Each choice also has boxes for a Bahasa Melayu and a Chinese translation. Leave them empty if you only test in English. To translate the question text, tap **Bahasa Melayu** or **中文 (Chinese)** under **Editing language**. A translated question is only used when every part of it is translated; otherwise staff see it in English.

Things to know

- The **Explanation** box says it is shown to the candidate with their result. It is not shown today: the result page staff see has no explanations.
- Switch off **Active** to stop a question being added to new tests without deleting it.
- A red padlock next to a question means staff have already answered it. Its wording and answers can no longer be changed, so old scores stay correct. Write a new question instead.

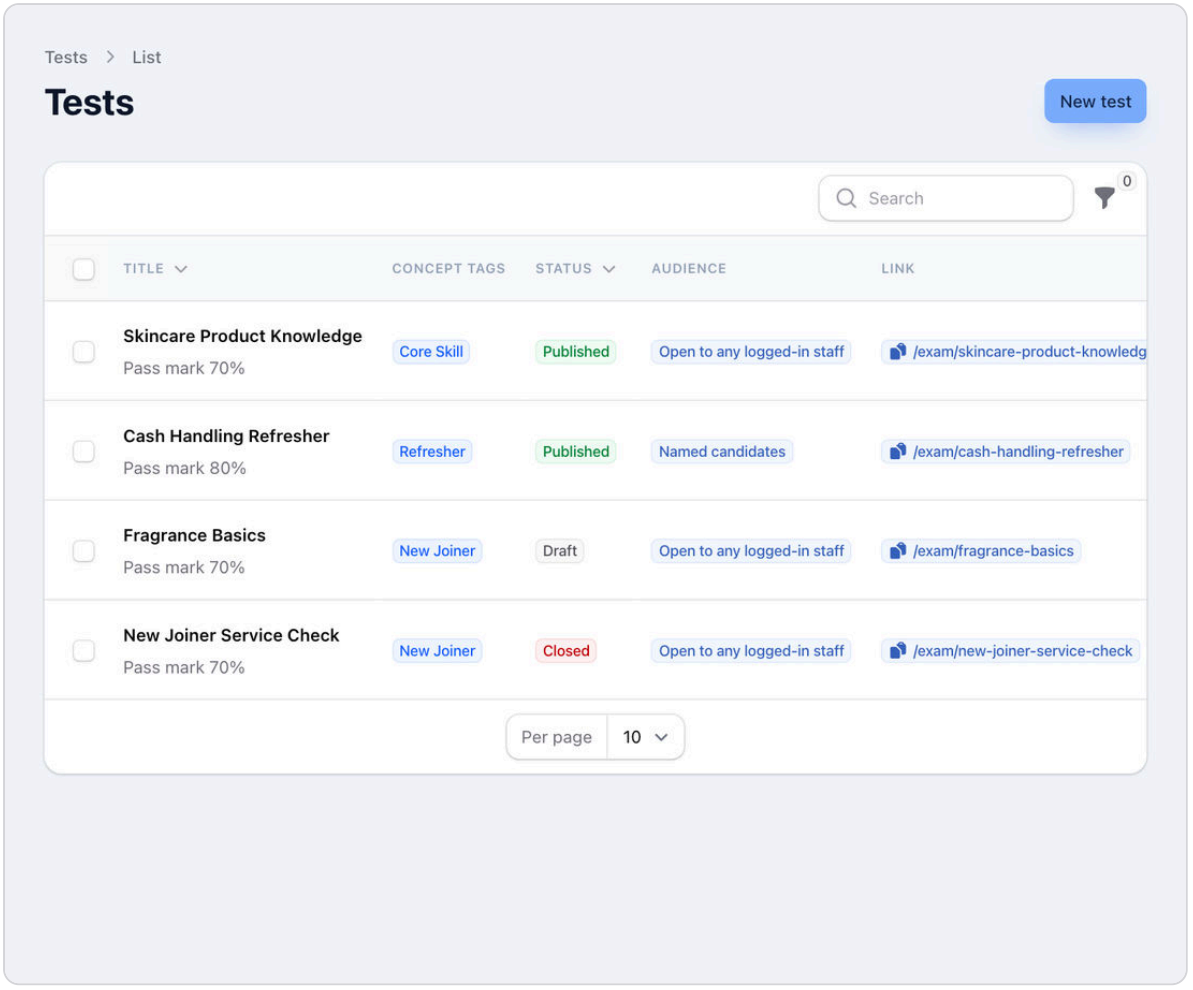
COMPETENCY TEST

Build and publish a test

For: Examiner

A test goes through three states: **Draft** while you build it, **Published** while staff can take it, and **Closed** when it is over.

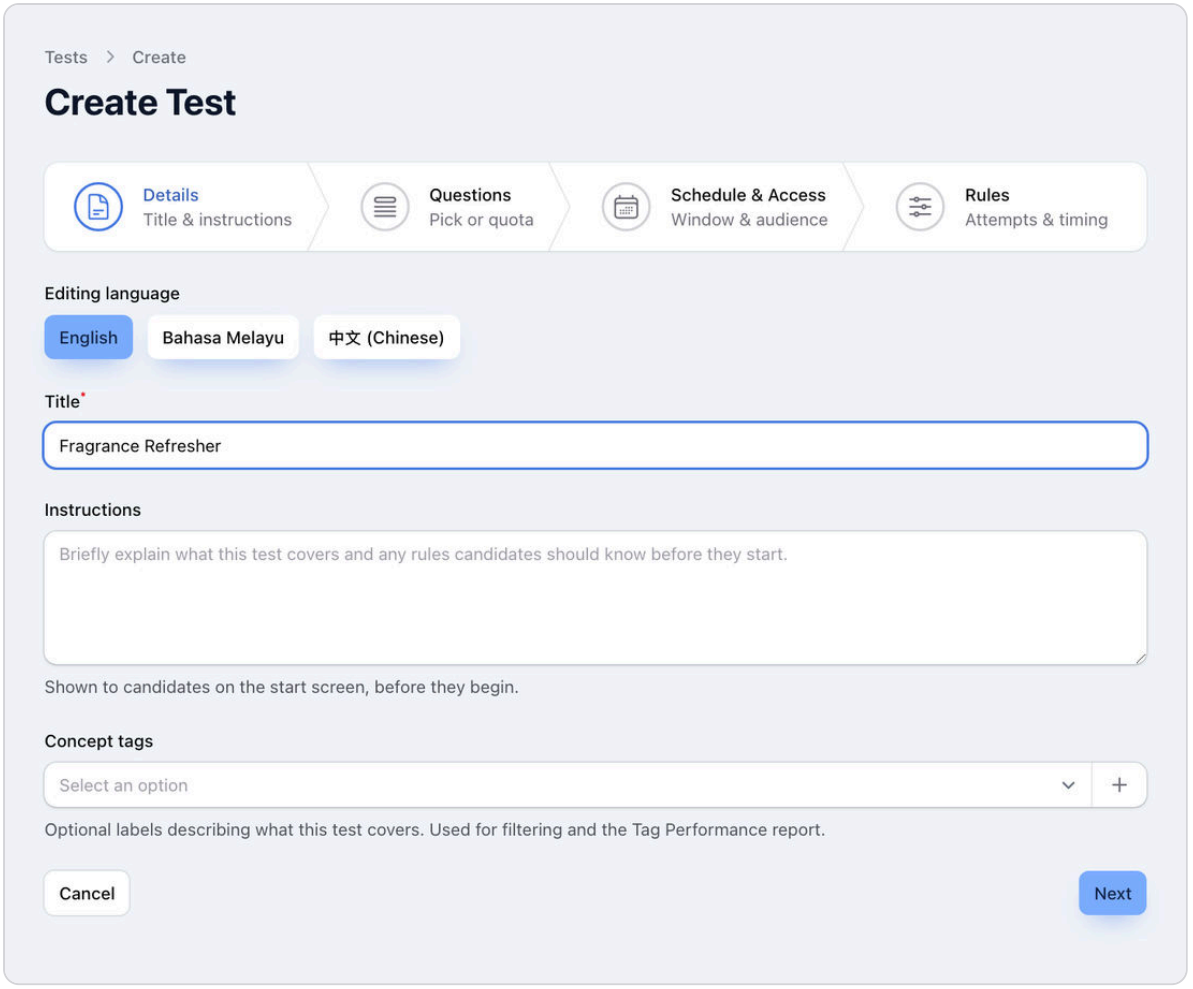
1. Open **Tests** under **EXAMS** in the menu.
2. Press **New test** at the top right.



The form has four steps along the top: **Details**, **Questions**, **Schedule & Access** and **Rules**. Press **Next** to move on, or tap a step to go back to it.

Step 1: Details

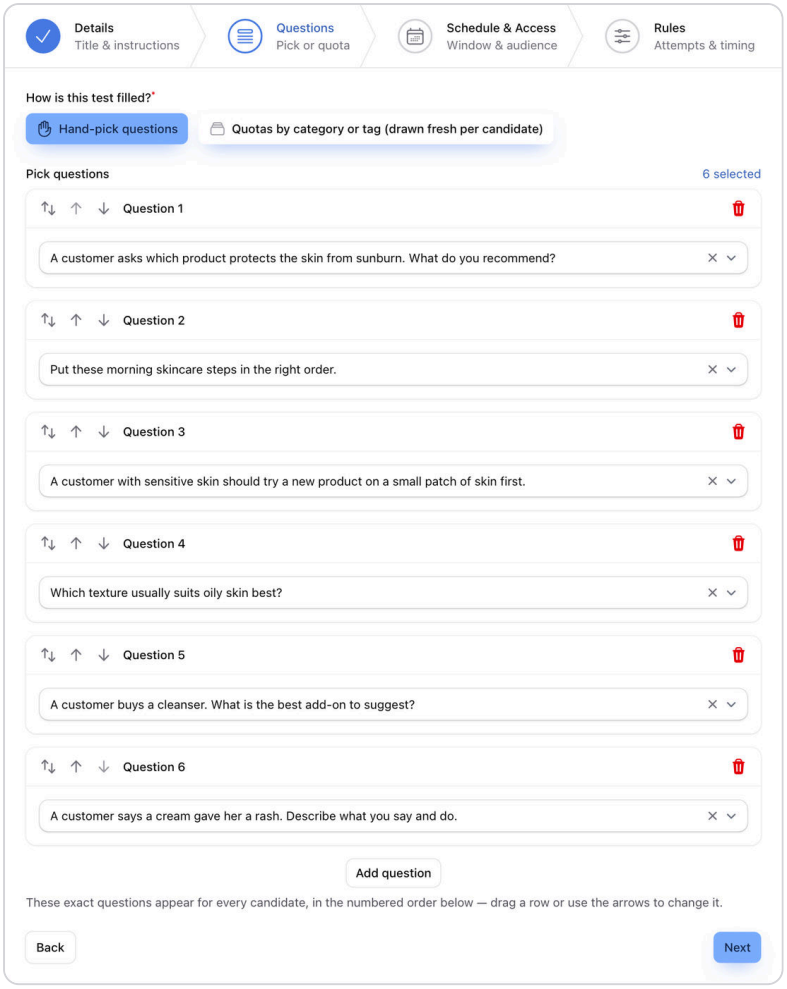
Type the **Title**. Under **Instructions**, write what staff should know before they begin; they see it on the start screen. **Concept tags** are optional labels for the **Tag Performance** report.

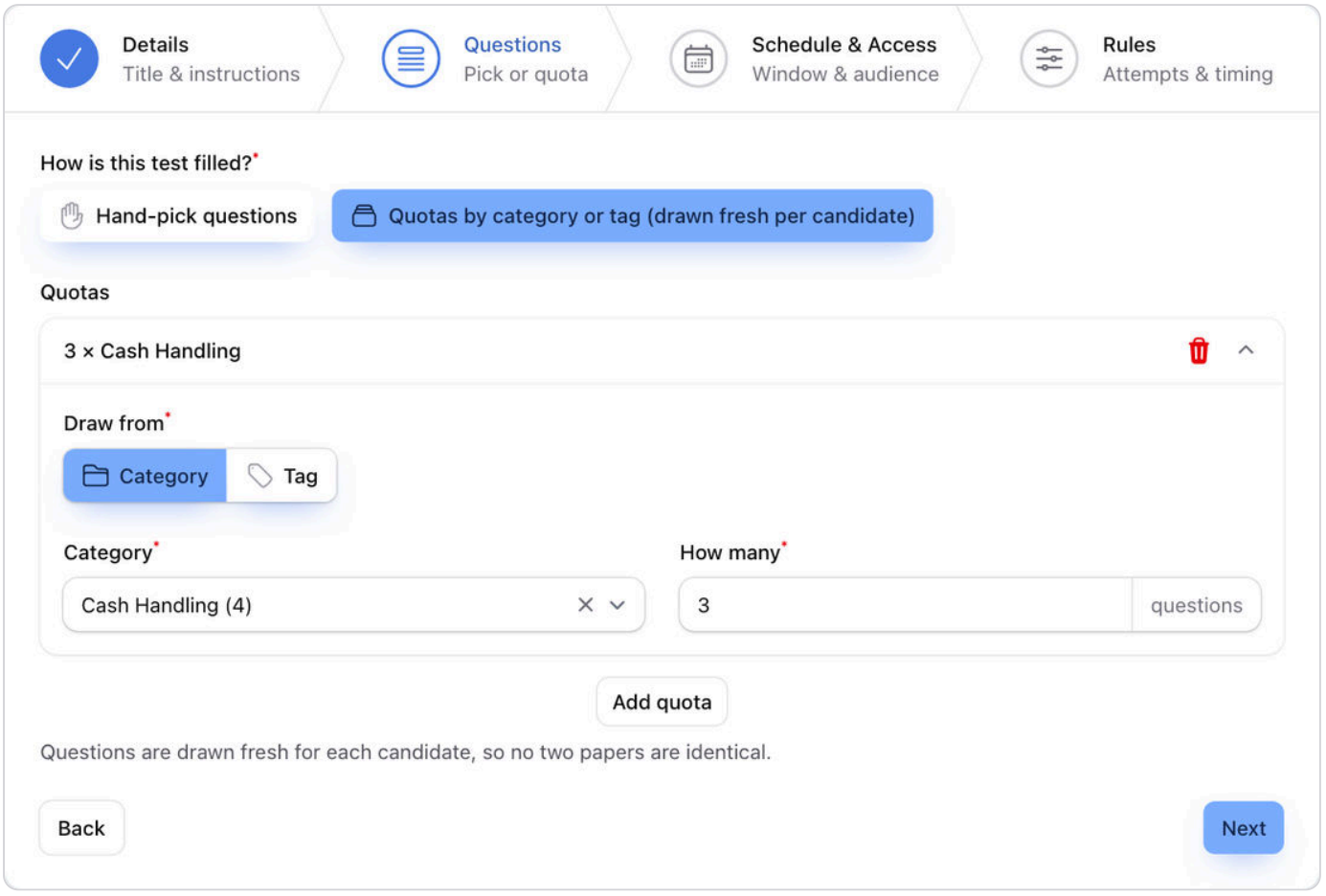


Step 2: Questions

Under **How is this test filled?** choose one:

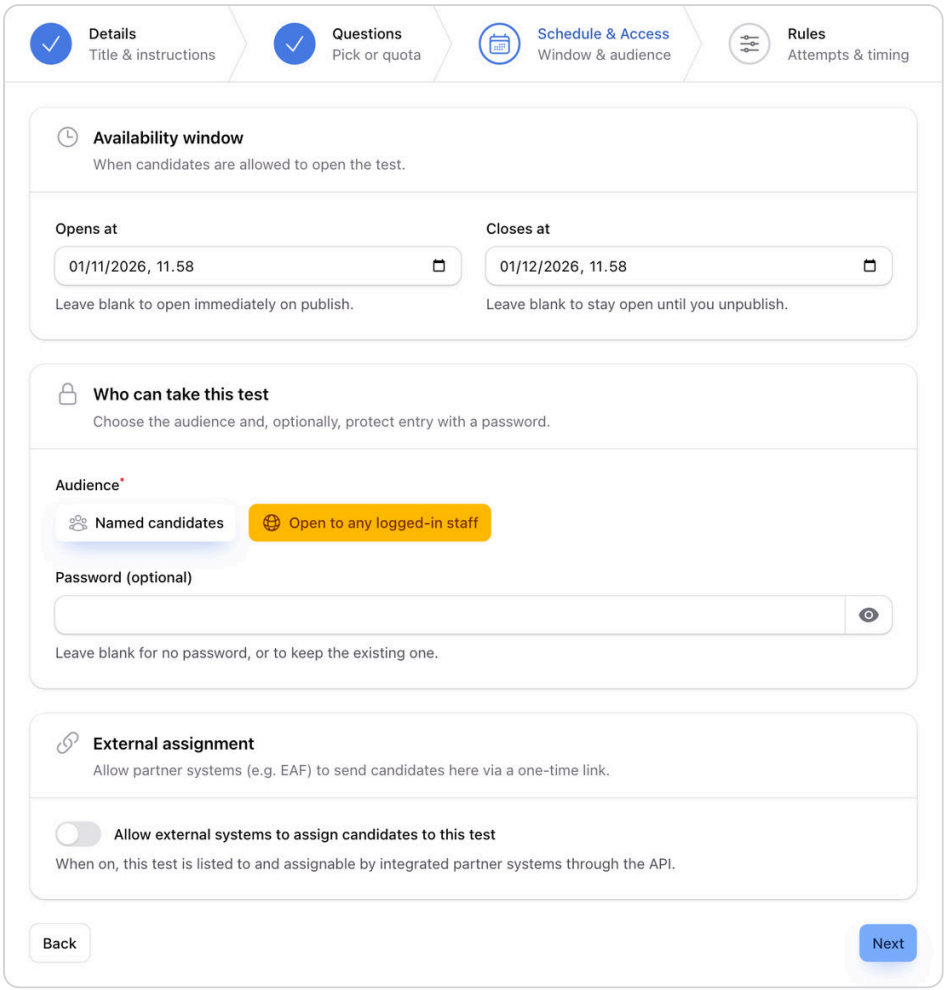
- **Hand-pick questions**: every person gets the same questions in the same order. Press **Add question** and choose each one. Use the arrows to change the order.
- **Quotas by category or tag (drawn fresh per candidate)**: the system picks questions at random for each person. Press **Add quota**, choose **Draw from Category** or **Tag**, pick which one, and type **How many** questions to take from it. The number in brackets after a category is how many questions it holds.


Details
Title & instructions
Questions
Pick or quota
Schedule & Access
Window & audience
Rules
Attempts & timing
How is this test filled?*
Hand-pick questions
Quotas by category or tag (drawn fresh per candidate)
Pick questions
6 selected
Question 1
A customer asks which product protects the skin from sunburn. What do you recommend?
Question 2
Put these morning skincare steps in the right order.
Question 3
A customer with sensitive skin should try a new product on a small patch of skin first.
Question 4
Which texture usually suits oily skin best?
Question 5
A customer buys a cleanser. What is the best add-on to suggest?
Question 6
A customer says a cream gave her a rash. Describe what you say and do.
Add question
These exact questions appear for every candidate, in the numbered order below — drag a row or use the arrows to change it.
Back
Next


Details
Title & instructions
Questions
Pick or quota
Schedule & Access
Window & audience
Rules
Attempts & timing
How is this test filled?*
Hand-pick questions
Quotas by category or tag (drawn fresh per candidate)
Quotas
3 × Cash Handling
Draw from*
Category
Tag
Category*
Cash Handling (4)
How many*
3
questions
Add quota
Questions are drawn fresh for each candidate, so no two papers are identical.
Back
Next

Step 3: Schedule & Access

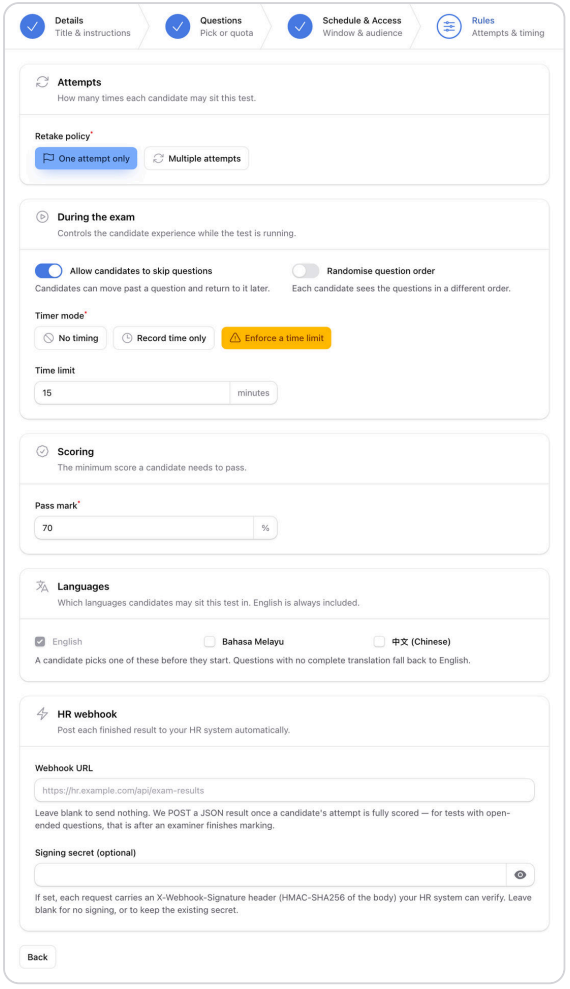
- **Opens at** and **Closes at**: when staff can open the test. Leave **Opens at** empty to open it as soon as you publish. Leave **Closes at** empty to keep it open until you close it.
- **Audience**: **Open to any logged-in staff** lets anyone with the link take it. **Named candidates** shows a **Candidates** box: only the people you pick there can take it. Anyone else who opens the link sees **You're not a candidate**. You can search by name or phone number. A person is only in this list after they have signed in to Competency test once, or after someone has added them under **Users**.
- **Password (optional)**: staff must type this password before they start. Give it to them yourself.
- **External assignment**: leave this off unless your IT team has connected another system that sends people to tests.



Step 4: Rules

- **Retake policy**: **One attempt only** or **Multiple attempts**. With multiple attempts, set **Maximum attempts** or leave it empty for no limit. The best try counts.
- **Allow candidates to skip questions** and **Randomise question order**.

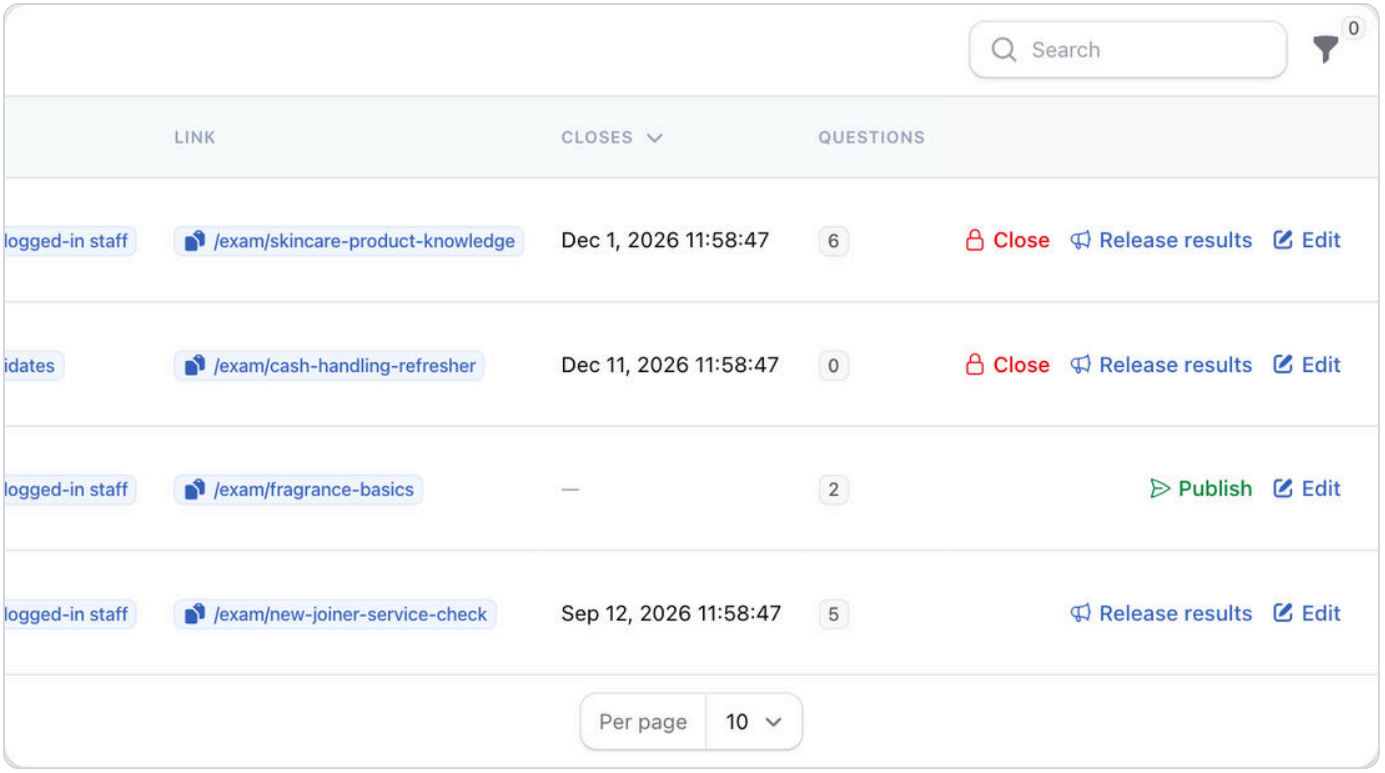
- **Timer mode**: **No timing**, **Record time only** (time is kept for the reports, no limit), or **Enforce a time limit** with a **Time limit** in minutes. When the time runs out, the test is submitted with the answers given so far.
- **Pass mark**: the score in % needed to pass. Every question is worth one point.
- **Supported languages**: English is always on. Tick **Bahasa Melayu** or **中文 (Chinese)** to let staff choose that language.
- **HR webhook**: leave it empty unless your IT team gives you an address. It sends each finished result to another system.



Press **Create** on the last step. The test is saved as a **Draft**. Staff cannot open it yet.

Publish and share the link

1. In the **Tests** list, scroll the row to the right and press **Publish**. If something is missing, a message says what, for example that a category does not hold enough questions for its quota.
2. Tap the address under **Link** to copy it. It also opens the test in a new tab so you can check it.
3. Send the link to your staff. The system does not send it for you.



When the test is over, press **Close** on its row. Staff who open the link then see **This test has closed**. A test also stops accepting people after its **Closes at** time, even if you do not press **Close**.

For a test filled by quotas, the **Questions** column in the list shows 0. That is normal: the questions are picked when each person starts.

COMPETENCY TEST

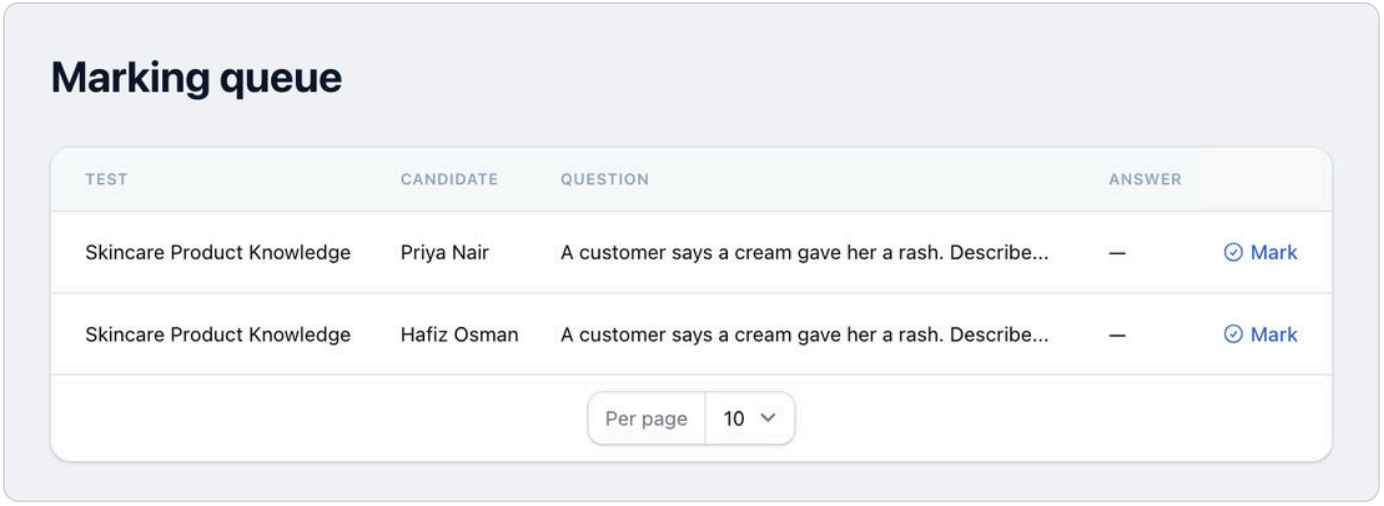
Mark answers and release results

For: Examiner

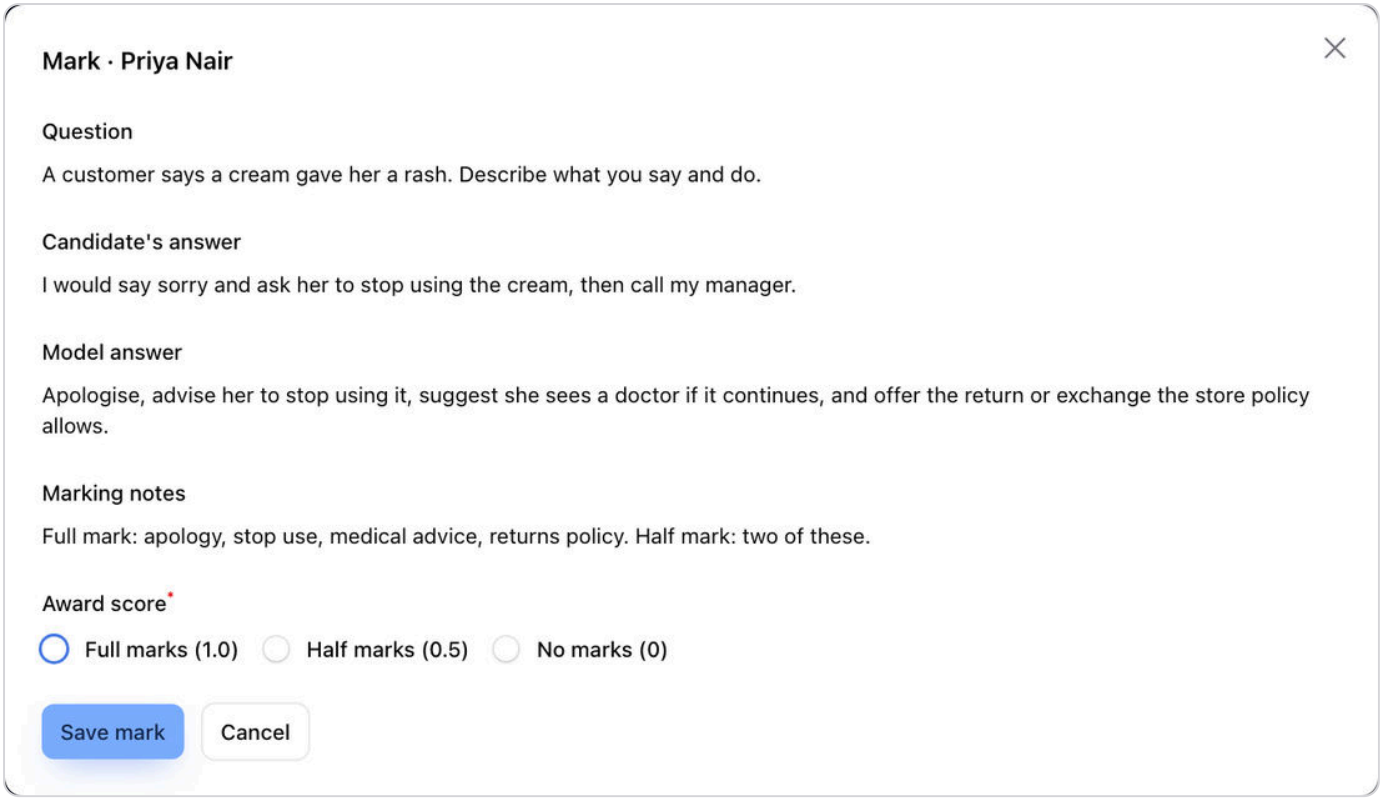
Multiple choice, True / False and ranking answers are scored by the system the moment a person submits. Open-ended (written) answers wait for you to mark them. Nobody sees a score until you release it.

Mark written answers

1. Open **Marking queue** under **EXAMS**. The number next to it is how many answers are waiting.
2. Find the answer and press **Mark** on its row. The **Answer** column in the list shows "—" today, even when the person wrote something; the answer itself shows once you press **Mark**.



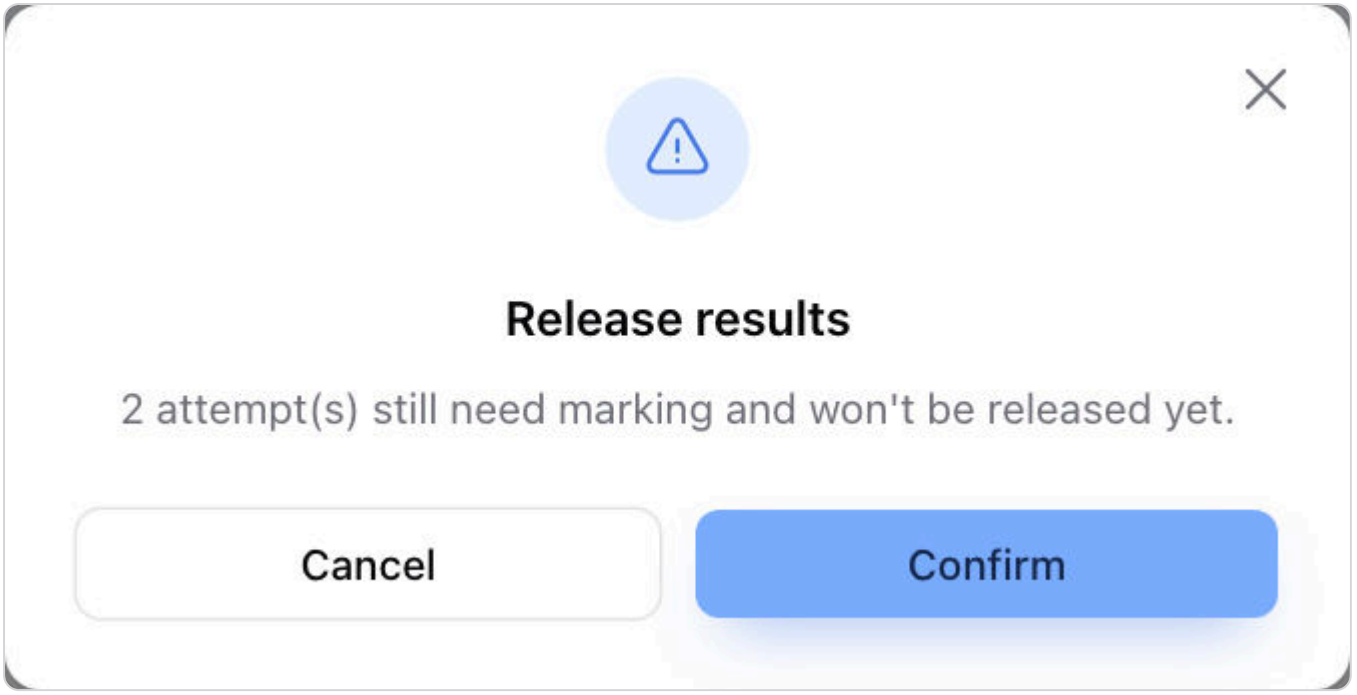
3. Read the **Candidate's answer** next to the **Model answer** and **Marking notes** you wrote with the question.
4. Under **Award score**, choose **Full marks (1.0)**, **Half marks (0.5)** or **No marks (0)**.
5. Press **Save mark**.



When every written answer in a person's test is marked, their score is final and the answer leaves the queue.

Release results

1. Open **Tests** under **EXAMS**.
2. On the test's row, press **Release results**. You may need to scroll the row to the right.
3. The window tells you if some people's answers still need marking; their results are held back. Press **Confirm**.



Every fully marked result for that test is now visible to the person on their test link. Press **Release results** again later to release results that were marked after this. Staff get no message; tell them their results are out.

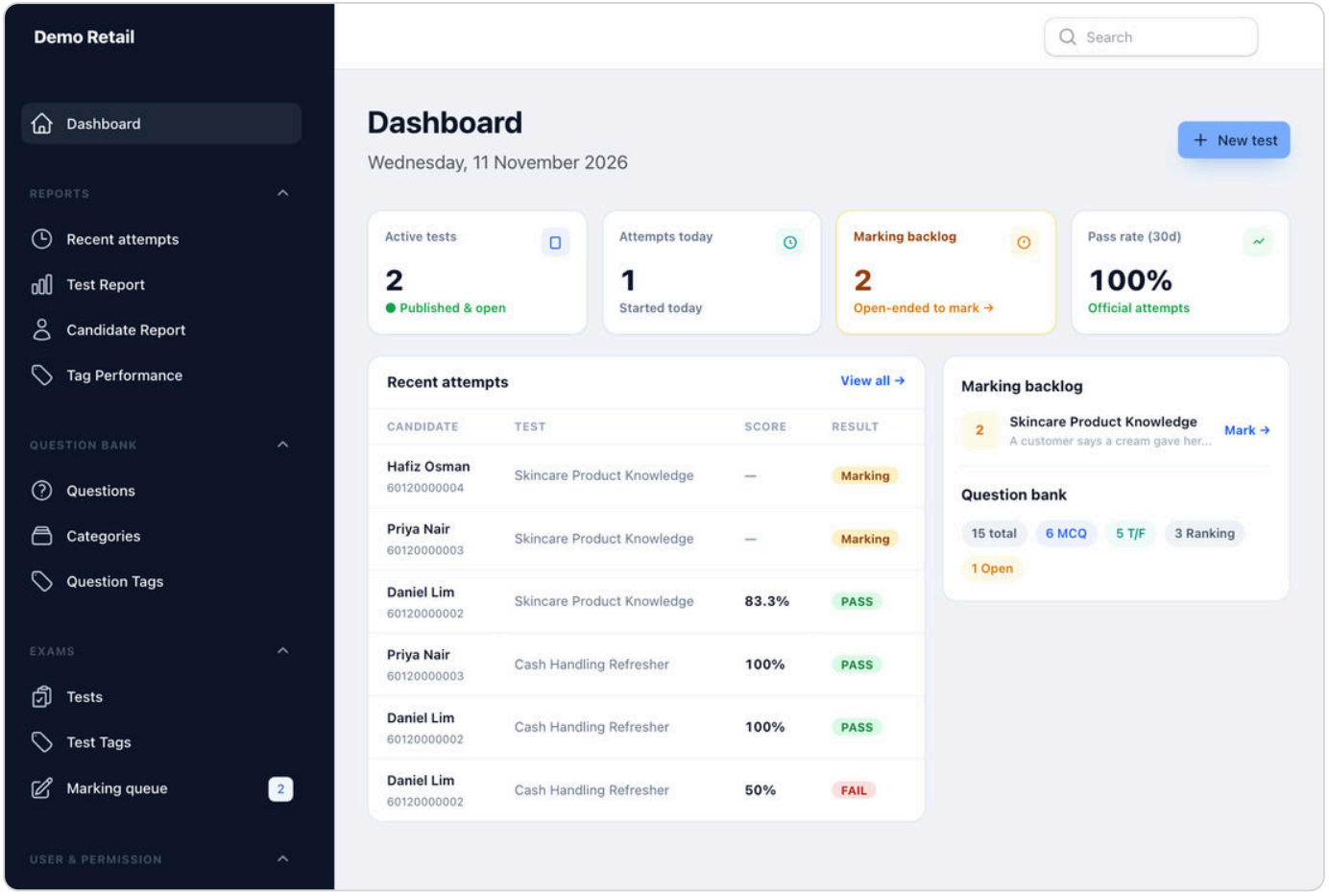
If you need to look at someone's full answer sheet before releasing, see the next page.

Read the results and reports

For: Examiner, Viewer

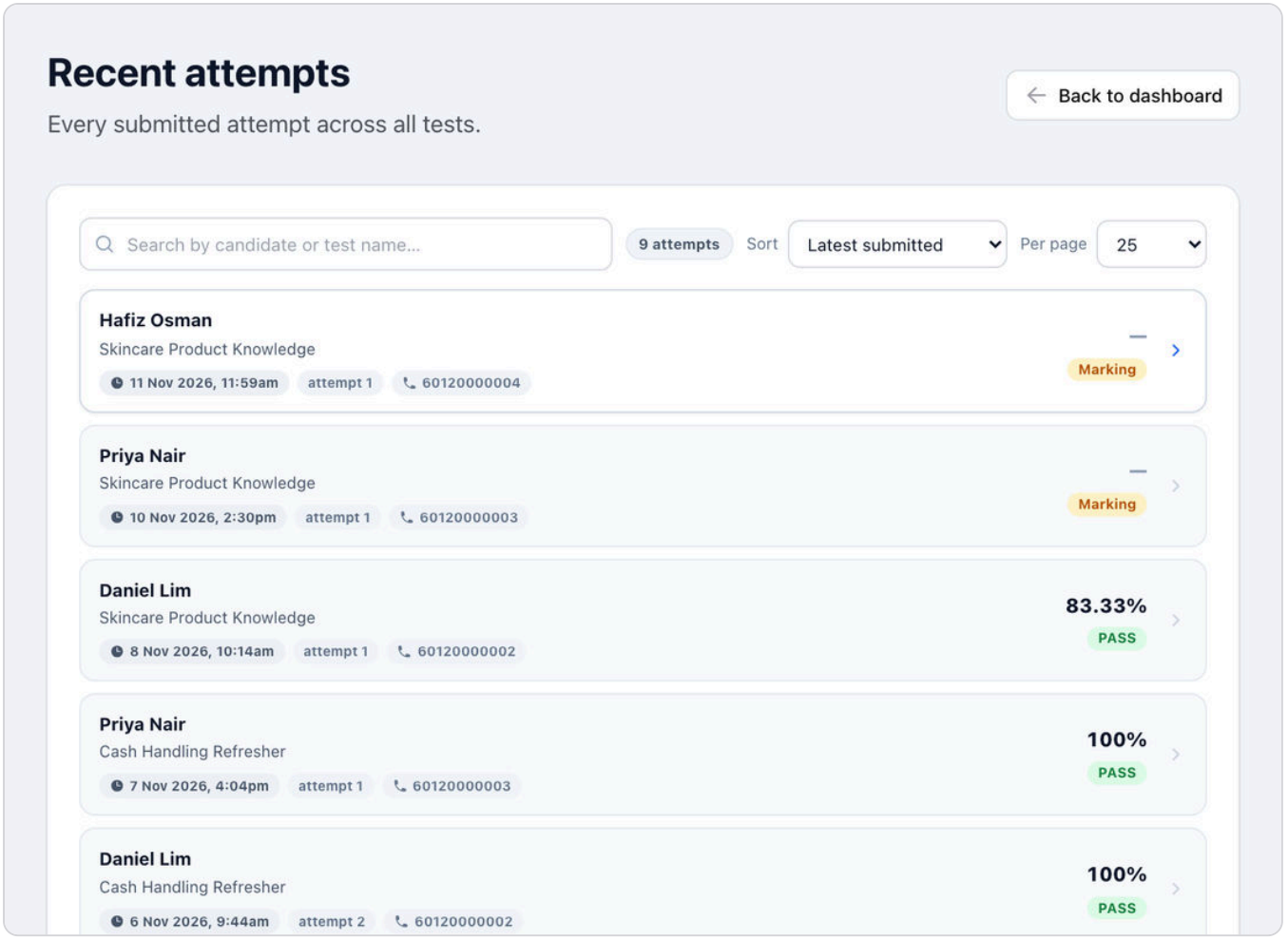
Dashboard

The **Dashboard** opens first. It shows how many tests are open now, how many attempts started today, how many written answers are waiting for marking, and the pass rate over the last 30 days. **Recent attempts** lists the latest tests taken; press **View all →** for the full list.



Every attempt, newest first

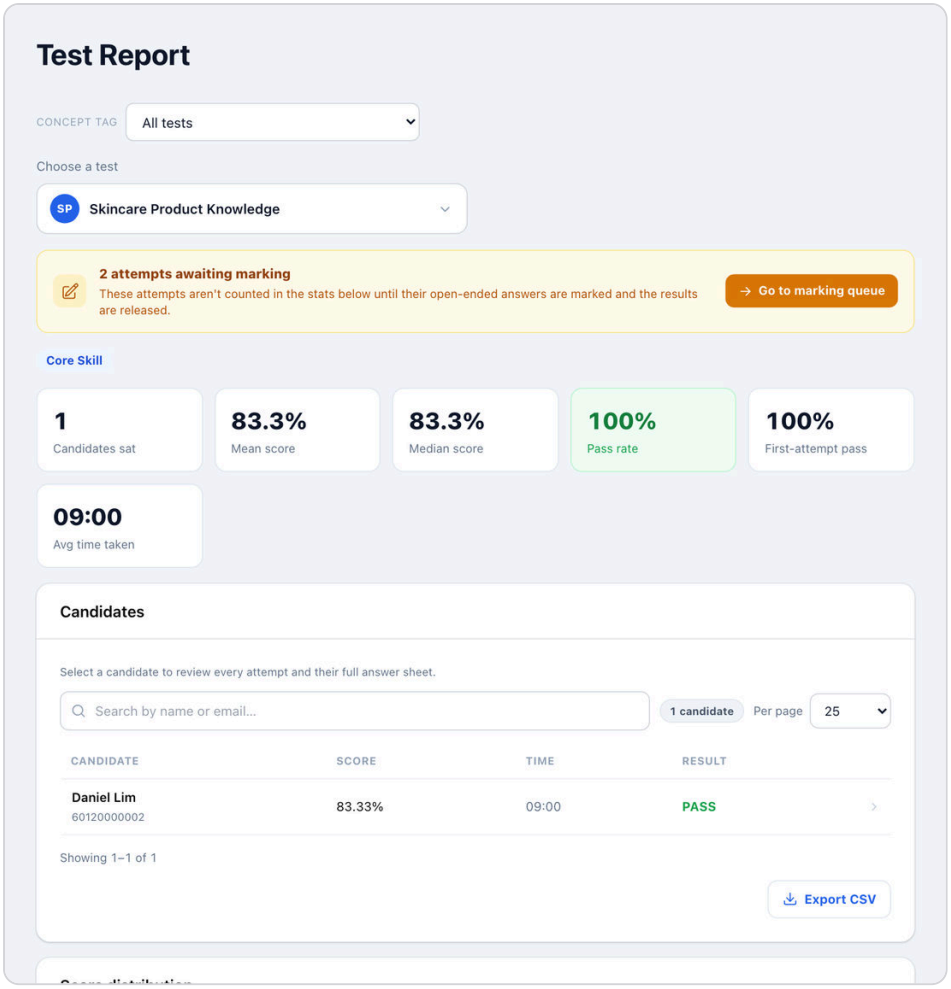
Open **Recent attempts** under **REPORTS**. Search by a person's name or a test name, and use **Sort** to order by date, score or name. An attempt that says **Marking** is waiting for written answers to be marked.



One test: how did everyone do?

1. Open **Test Report** under **REPORTS**.
2. Under **Choose a test**, pick the test. **CONCEPT TAG** above it narrows the list.

You see how many people took it (**Candidates sat**), the **Mean score**, **Median score**, **Pass rate**, **First-attempt pass** and **Avg time taken**. Results still waiting for marking or release are not counted yet; a yellow box says how many.



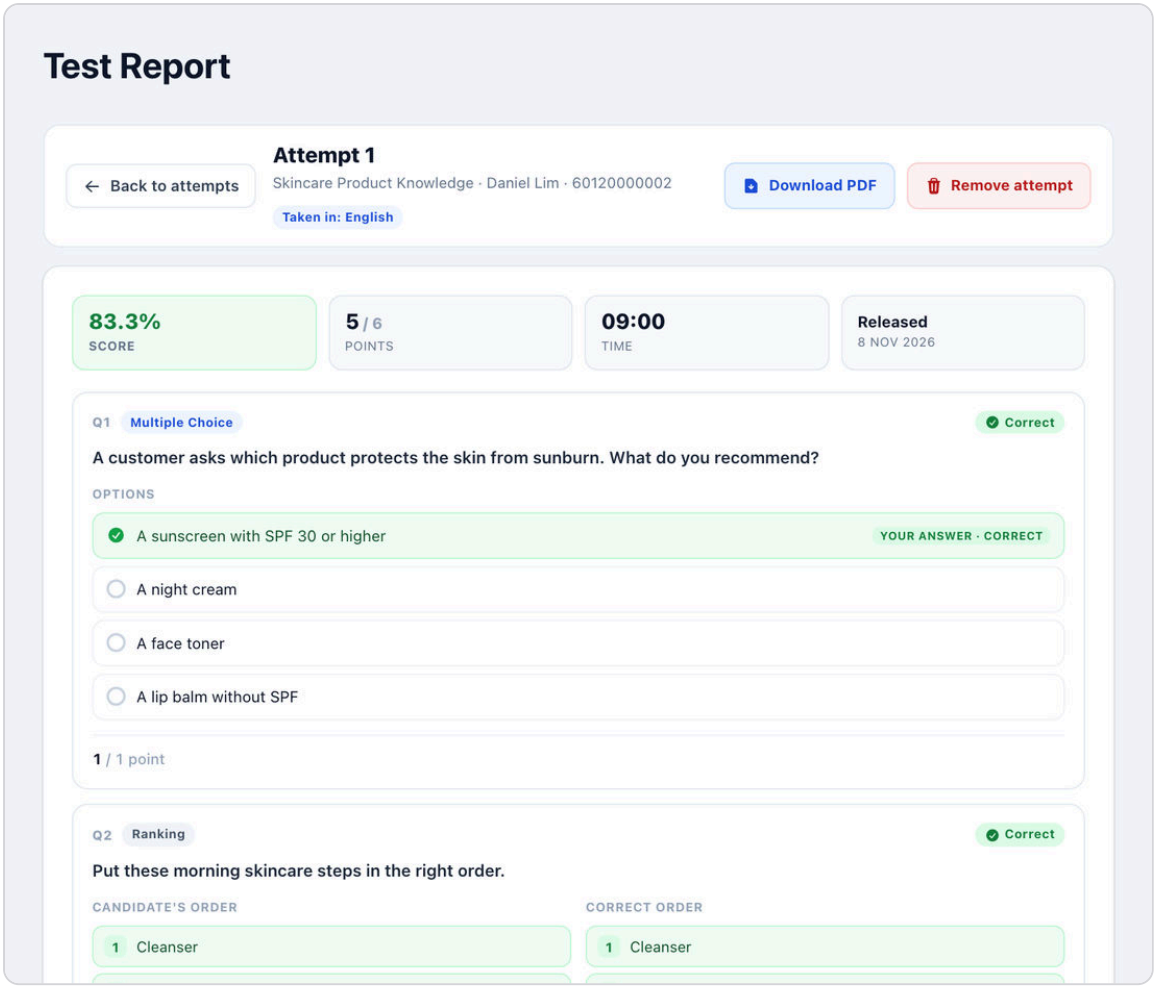
Further down the page:

- **Candidates**: each person's score, time and result. Press **Export CSV** to download the list as a spreadsheet file.
- **Score distribution**: how many people scored in each band.
- **Performance by question type** and **Topic performance**: where people are strong and where they struggle, by category and tag.
- **Item analysis**: how hard each question was. A question almost nobody gets right may have the wrong answer set.

One person's answer sheet

1. In the **Candidates** list of the Test Report, press a person's row.
2. Press the attempt you want to see.

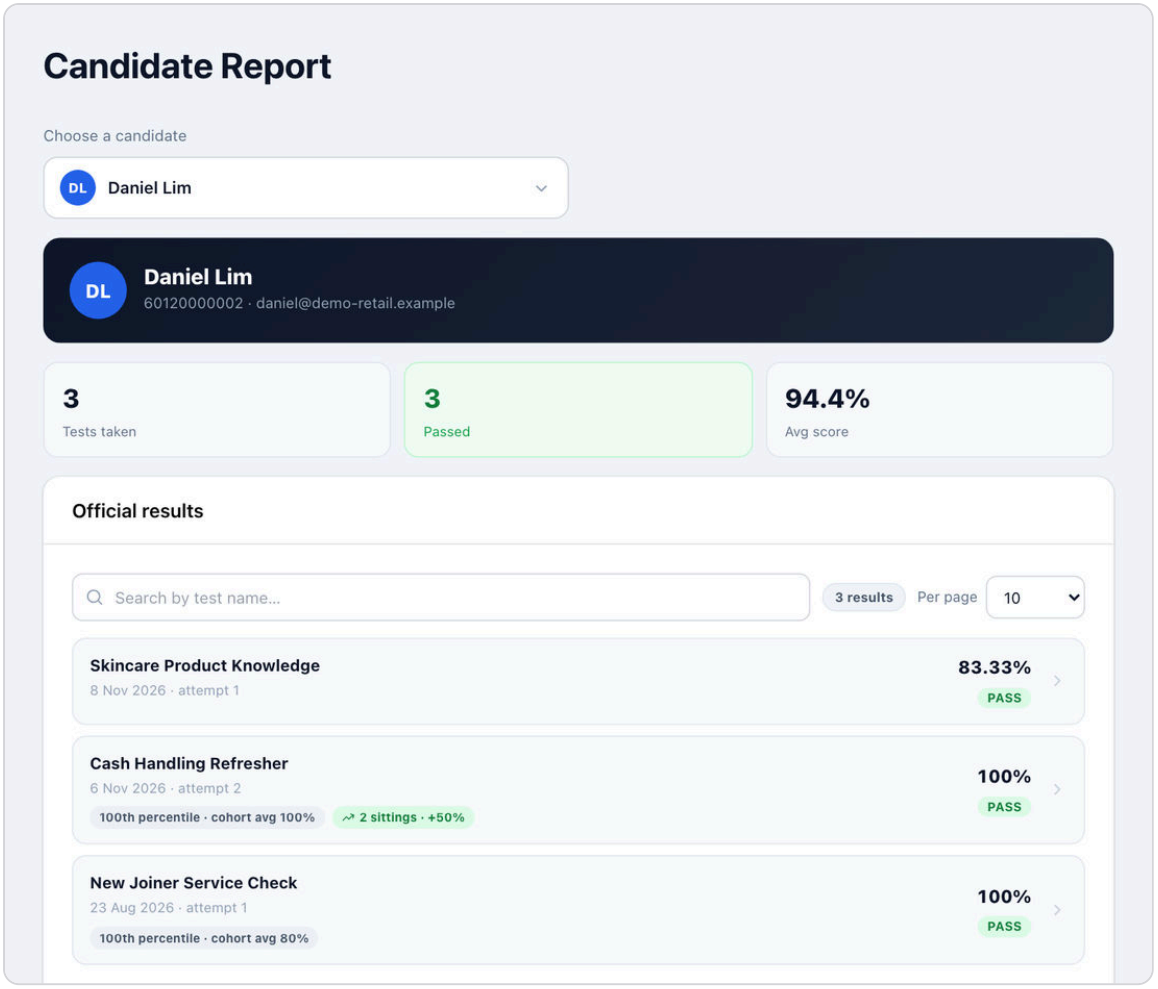
You see every question, the answer they gave and the right answer. Press **Download PDF** to save the answer sheet. **Remove attempt** deletes that attempt for good; use it only when a test has to be taken again from scratch.



One person across all tests

1. Open **Candidate Report** under **REPORTS**.
2. Under **Choose a candidate**, pick the person.

You see how many tests they took, how many they passed, their average score, and their counted result for each test. When someone took a test more than once, their best try is the one shown.



Results by topic label

Open **Tag Performance** under **REPORTS** to see the average score and pass rate for all tests that carry the same concept tag, for example all "New Joiner" tests.

Tag Performance

Cohort performance rolled up by the tags on each test.

Performance by tag

Each row aggregates the official (marked or released) attempts across every test carrying that tag.

TAG	TESTS	ATTEMPTS	MEAN SCORE	PASS RATE
Core Skill	1	1	83.3%	100%
New Joiner	2	3	80%	66.7%
Refresher	1	2	100%	100%

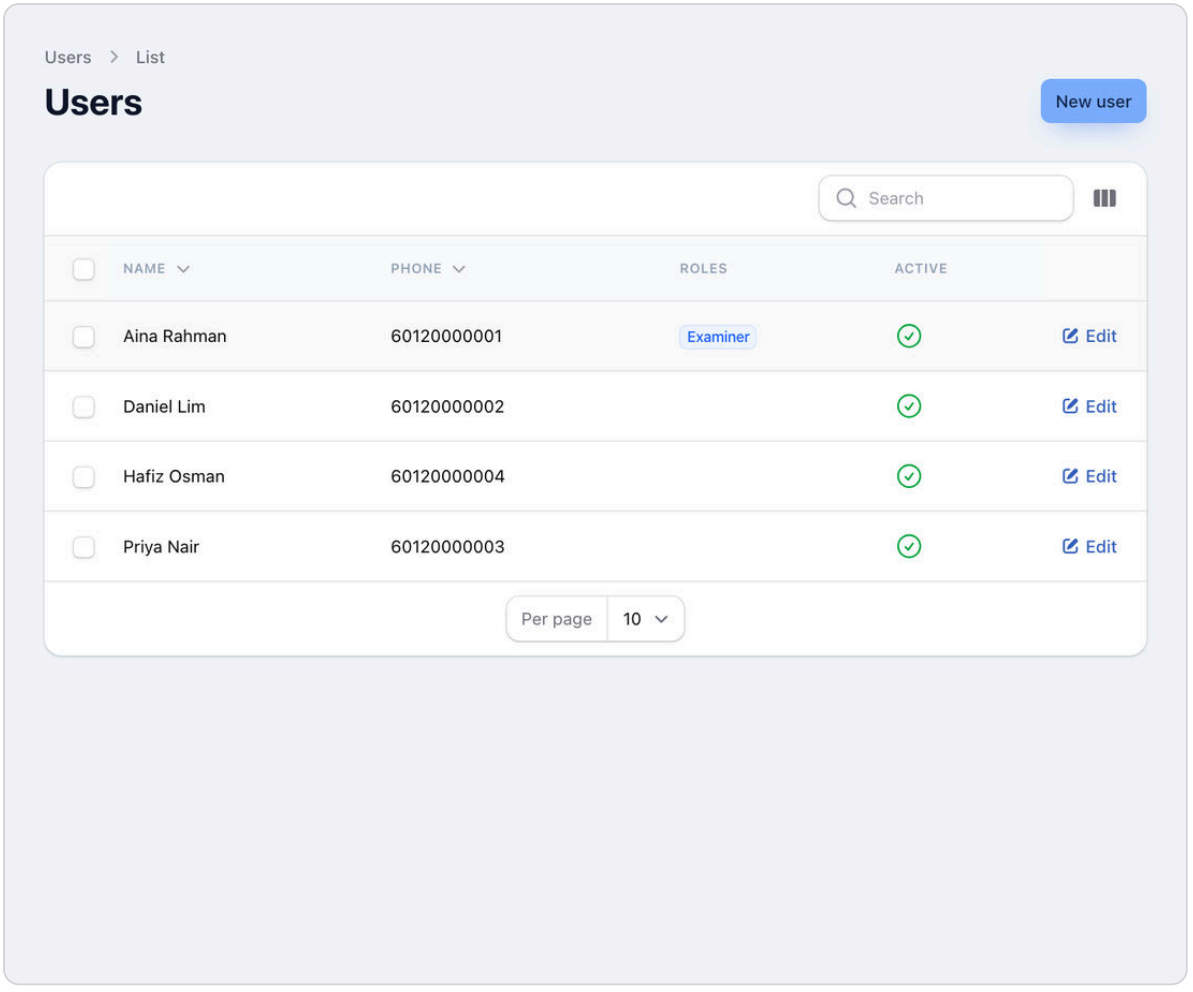
Give someone examiner or viewer access

For: Administrators

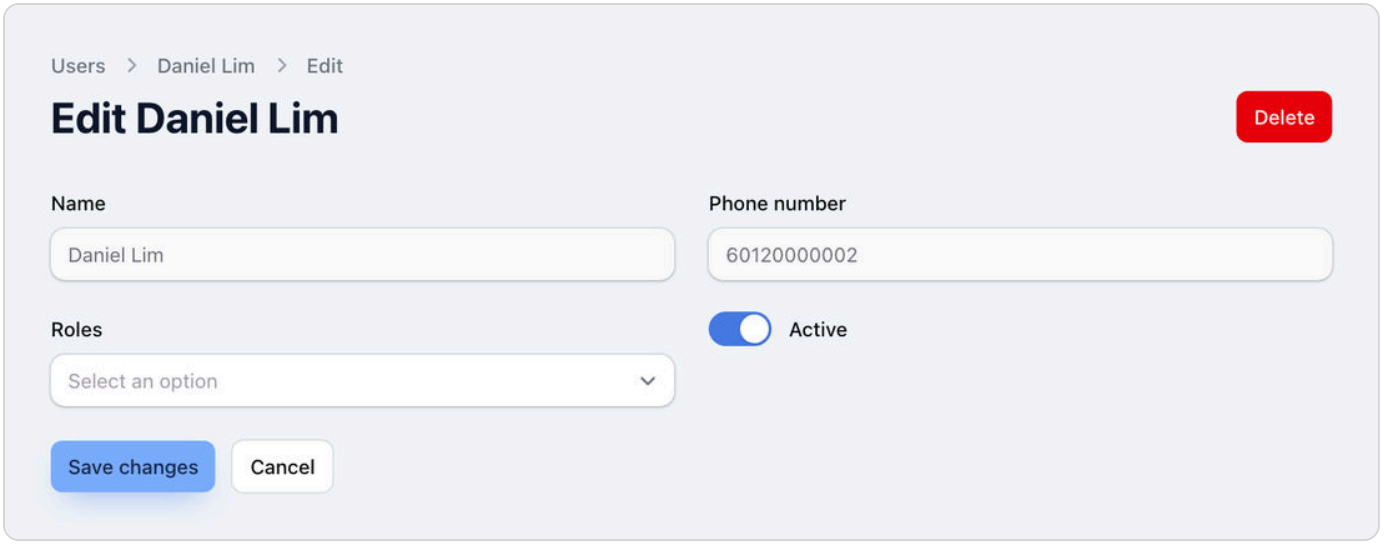
People who only take tests need no role. Give a role to the people who run tests or read results. People with the **Examiner** role can do this.

Give a role

1. Ask the person to open Competency test and sign in once. That adds them to the list.
2. Open **Users** under **USER & PERMISSION** in the menu.



3. Press **Edit** on their row.
4. Under **Roles**, choose **Examiner** or **Viewer**.
5. Press **Save changes**.



Next time they open Competency test they see **Go to dashboard**.

- **Examiner**: write questions, build and publish tests, mark answers, release results, read reports, and give roles.
- **Viewer**: read the reports and lists. Cannot change anything and cannot mark answers.

You can also add someone yourself with **New user**: type their **Name** and **Phone number**. Use the same phone number they sign in with.

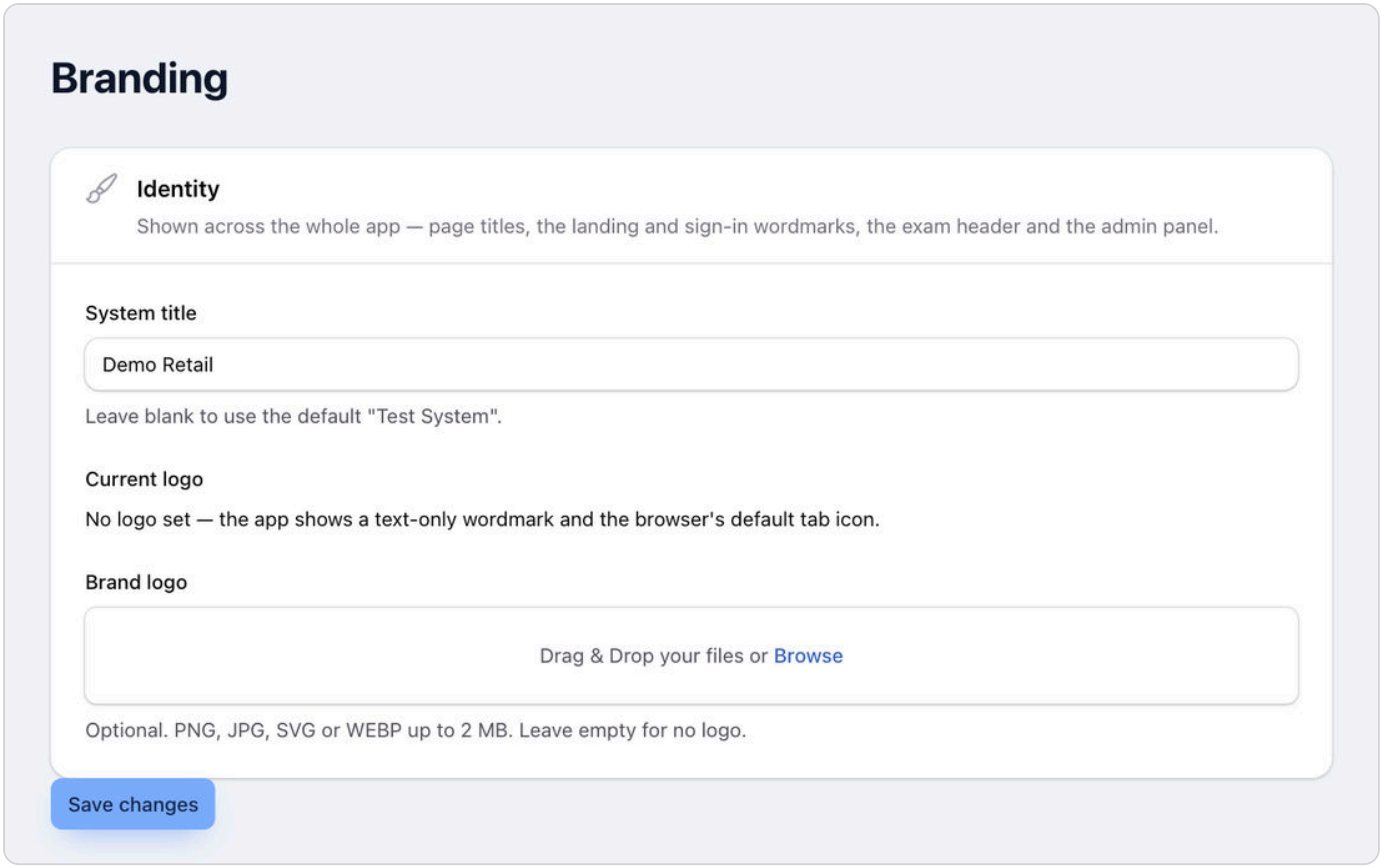
To take someone's access away, remove their role. Switching off **Active** blocks the person from the examiner screens and from taking tests.

The full-access role

The full-access role cannot be given from this screen; your IT team gives it. People with it also see **Roles**, to change what each role may do, and **Branding**.

Change the name shown on the screens

People with full access can open **Branding** under **SETTINGS**. **System title** is the name shown on the sign-in page, the test screens and the examiner screens. **Brand logo** is optional. Press **Save changes**.


Branding
Identity
Shown across the whole app — page titles, the landing and sign-in wordmarks, the exam header and the admin panel.
System title
Demo Retail
Leave blank to use the default "Test System".
Current logo
No logo set — the app shows a text-only wordmark and the browser's default tab icon.
Brand logo
Drag & Drop your files or Browse
Optional. PNG, JPG, SVG or WEBP up to 2 MB. Leave empty for no logo.
Save changes

USER GUIDE · VERSION 1

Staff memo

Company memos and procedures (SOPs) in one place, with a record of who has read and confirmed each one. It is also the Home screen that opens your other apps.

1. What it is for
2. Sign in
3. Open your apps
4. Read memos
5. Confirm you have read a memo
6. Find a procedure
7. Ask to read a locked procedure
8. The admin area
9. Post a memo
10. Pin and follow up a memo
11. Add a procedure
12. Approve and publish a procedure
13. Answer requests to read a procedure
14. Give someone admin rights
15. Connect an app to Home
16. See who can open each app
17. Change your branding

What it is for

For: Everyone

Staff memo is your company's staff portal. It does three jobs:

- **Memo Board**: announcements, notices and guidelines for staff. Head office can ask staff to confirm they have read a memo, and sees who has.
- **SOPs**: your company's standard operating procedures (SOPs, the written steps for a job, such as opening an outlet). Each one has a code, a version number and a date it takes effect.
- **Your apps**: one Home screen for the other apps your company uses. You sign in once here and open each app from its tile without signing in again.

Who uses it

- **Staff** read memos, confirm the ones that ask for it, look up procedures and open their apps.
- **Administrators** write memos, publish procedures, answer requests to read a procedure, and set up the apps on Home. What each administrator can do depends on their role. The roles that come with it are **Hr**, **Sop Approver** and **Super Admin**.

What it needs from other modules

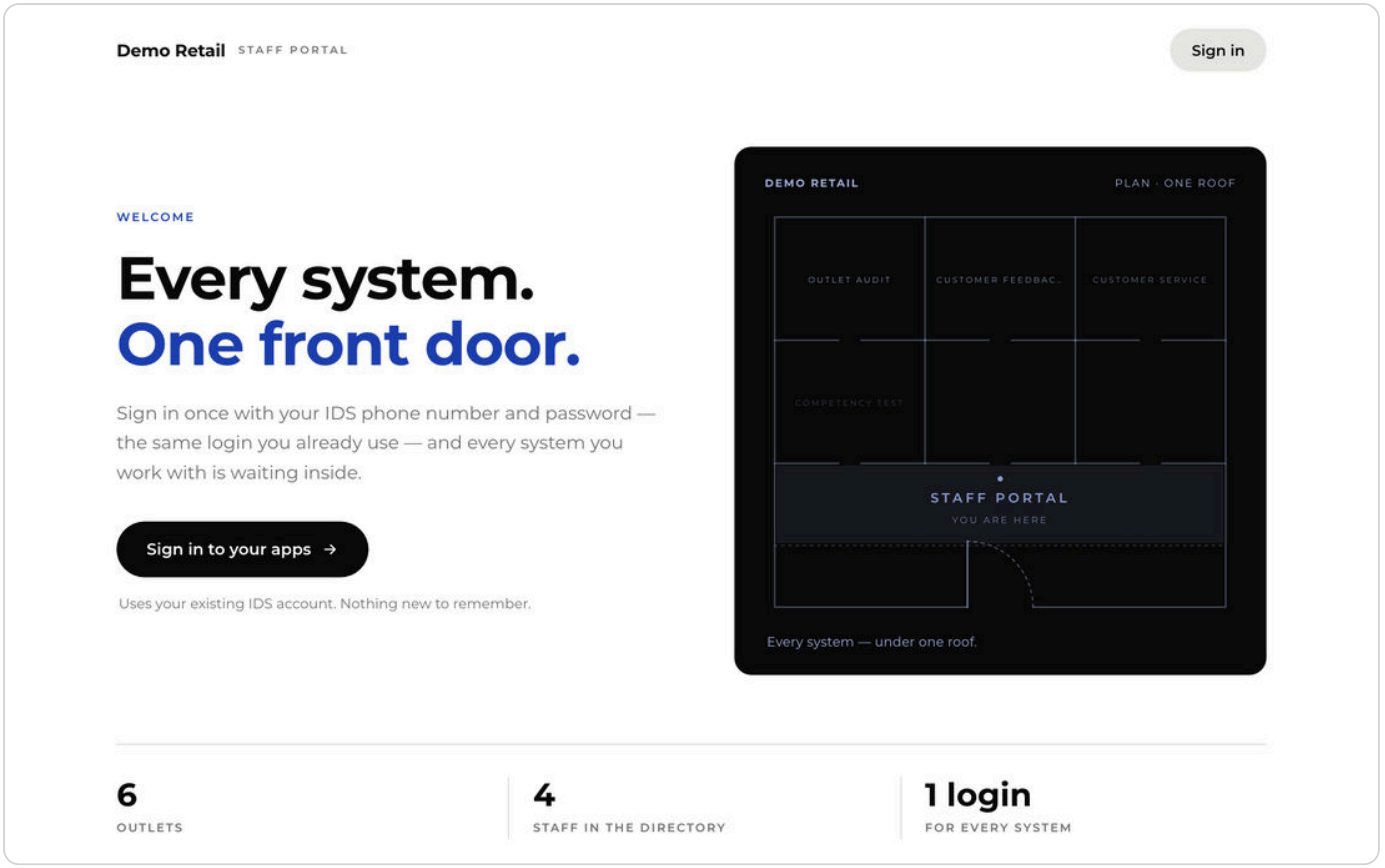
- Sign-in uses your company's shared sign-in service (phone number and password).
- Staff names, outlets, departments and staff grades come from Master data. Memos and procedures meant for one group (outlet staff, a department, a staff grade) only reach a person who is in Master data with the same phone number they sign in with.
- Each app on Home must be connected by an administrator before staff can open it from here.

STAFF MEMO

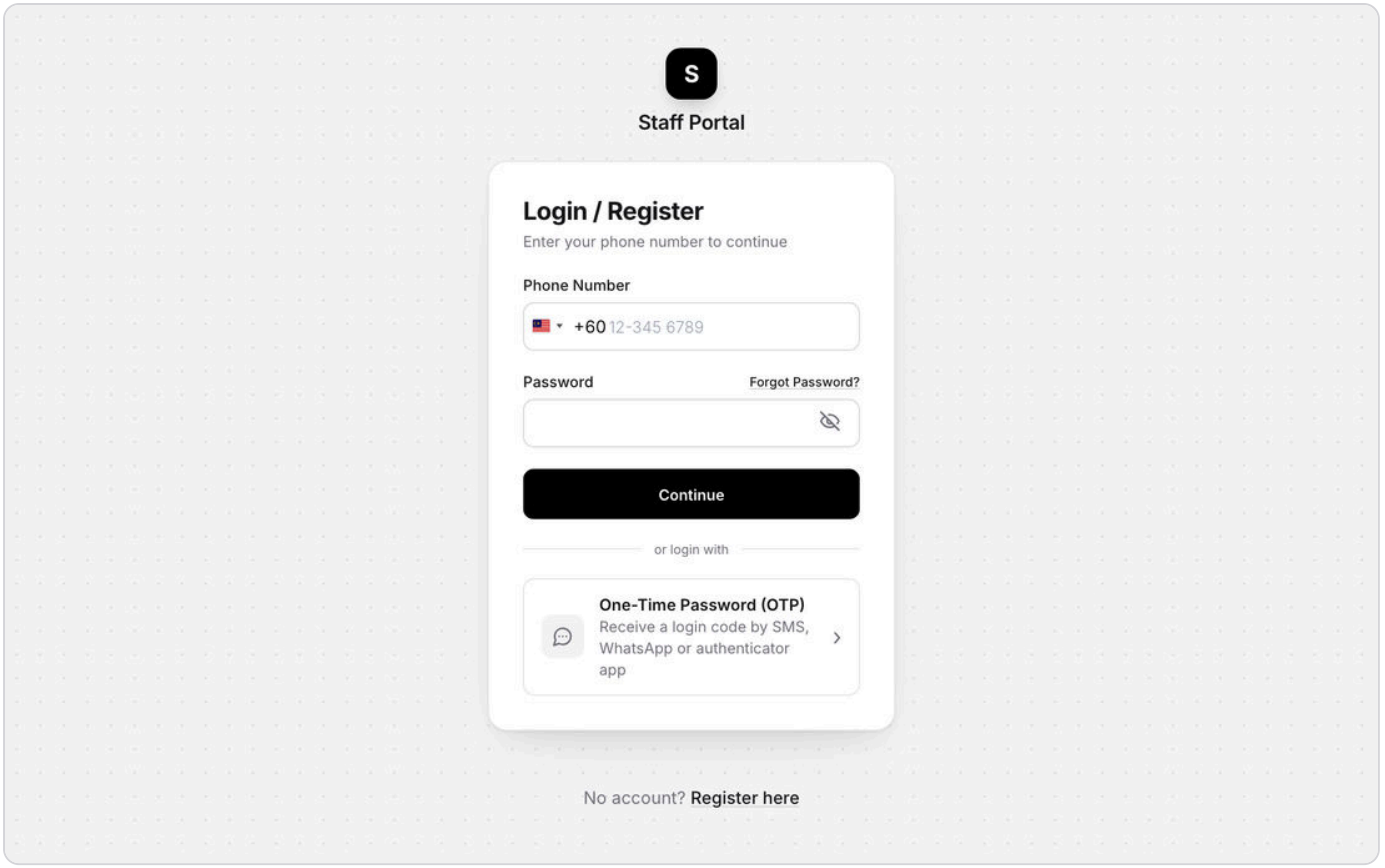
Sign in

For: Everyone

1. Open your company's portal address. The front page shows your company name and how many outlets and staff are in the directory.
2. Press **Sign in to your apps** (or **Sign in** at the top right).



3. Enter your **Phone Number**. The country code (+60 for Malaysia) is already filled in. Change it with the flag if you need to.
4. Enter your **Password** and press **Continue**.



No password, or forgot it?

- Under **or login with**, choose **One-Time Password (OTP)** to get a sign-in code by SMS, WhatsApp or an authenticator app.
- Press **Forgot Password?** above the password box to set a new one.

It is the same phone number and password for every app on Home.

No account? Ask HR or IT to set one up. Use the phone number HR has on record for you, so the portal can match you to your outlet and department.

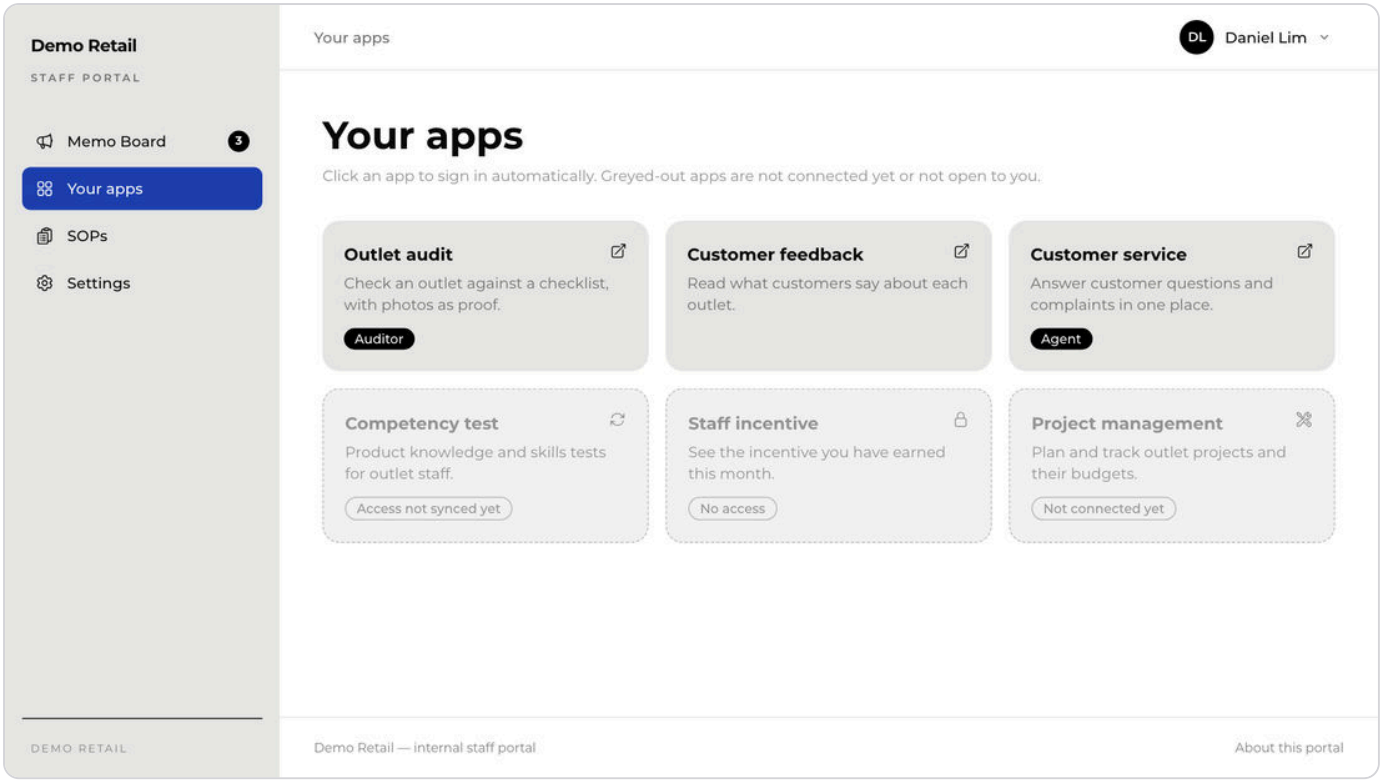
To sign out, press your name at the top right and choose **Sign out**.

STAFF MEMO

Open your apps

For: Staff

1. Press **Your apps** in the menu on the left.
2. Press a tile. The app opens in a new browser tab, already signed in.



The small dark label on a tile, for example **Auditor** or **Agent**, is your role inside that app.

Why is a tile grey? Greyed-out tiles cannot be opened. The label at the bottom says why:

Label	What it means
Access not synced yet	The app has not yet told the portal whether you may use it. The portal checks each time you sign in and again every night at 2 am. If it has not changed by the next day, ask your administrator.
No access	Your company has the app, but you have not been given access to it. Ask your manager.
Not connected yet	The app is listed but cannot be opened from here yet. Your administrator is setting it up.

If a tile says **roles may be outdated**, your role in that app has not been checked for more than a day. You can still open it.

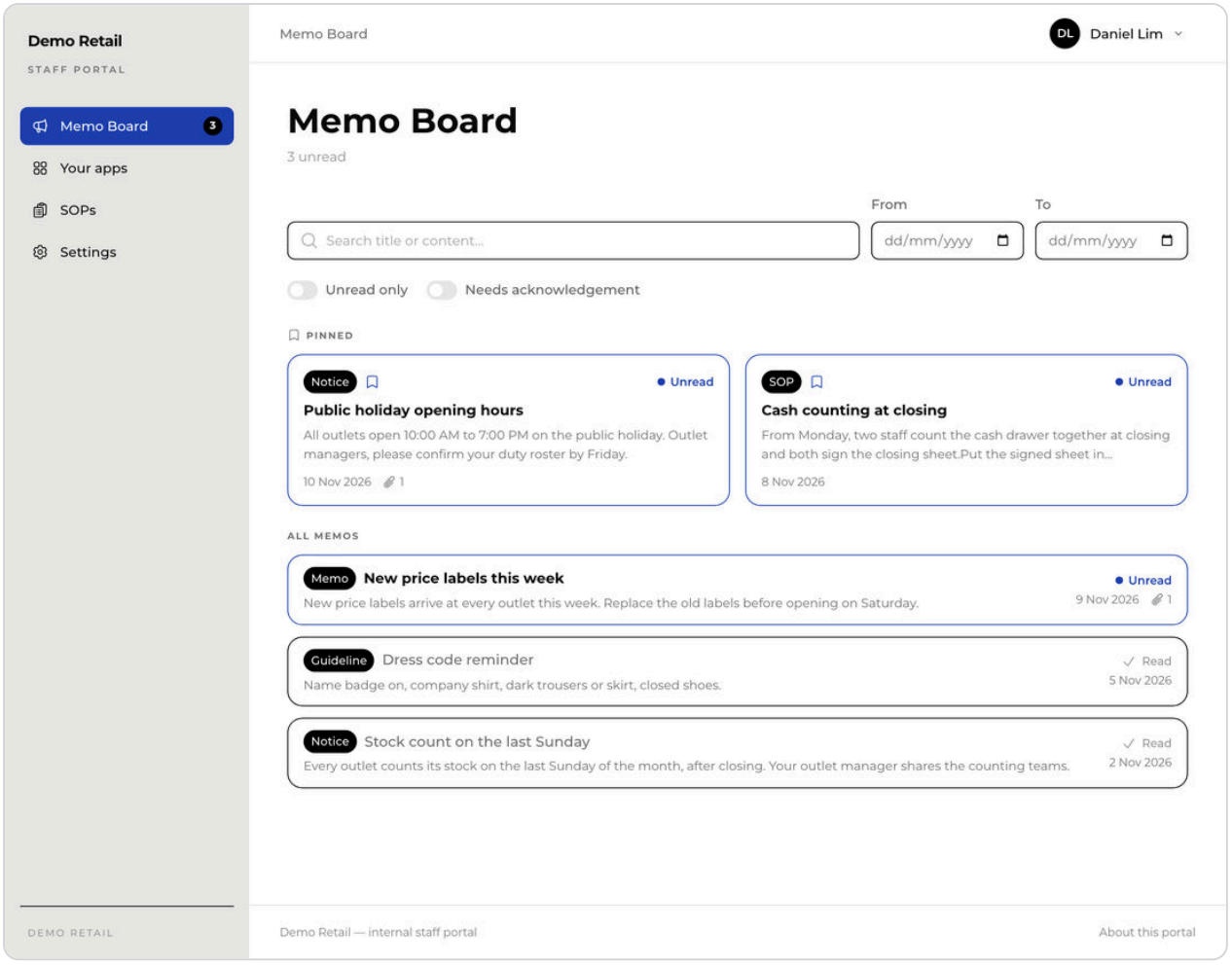
The menu on the left also has **Memo Board**, **SOPs** and **Settings**. In **Settings** you can change your name, your email address and whether the screen is **Light**, **Dark** or follows your device (**System**).

STAFF MEMO

Read memos

For: Staff

1. Press **Memo Board** in the menu on the left. The number next to it is how many memos you have not opened yet.
2. Memos under **Pinned** stay at the top. Below them, **All memos** are listed newest first.
3. Press a memo to read it.



On each memo:

- The black label is its kind: **Memo**, **SOP**, **Guideline** or **Notice**.
- **Unread** in blue means you have not opened it yet. **Read** means you have.
- A paper clip and a number shows how many files are attached.

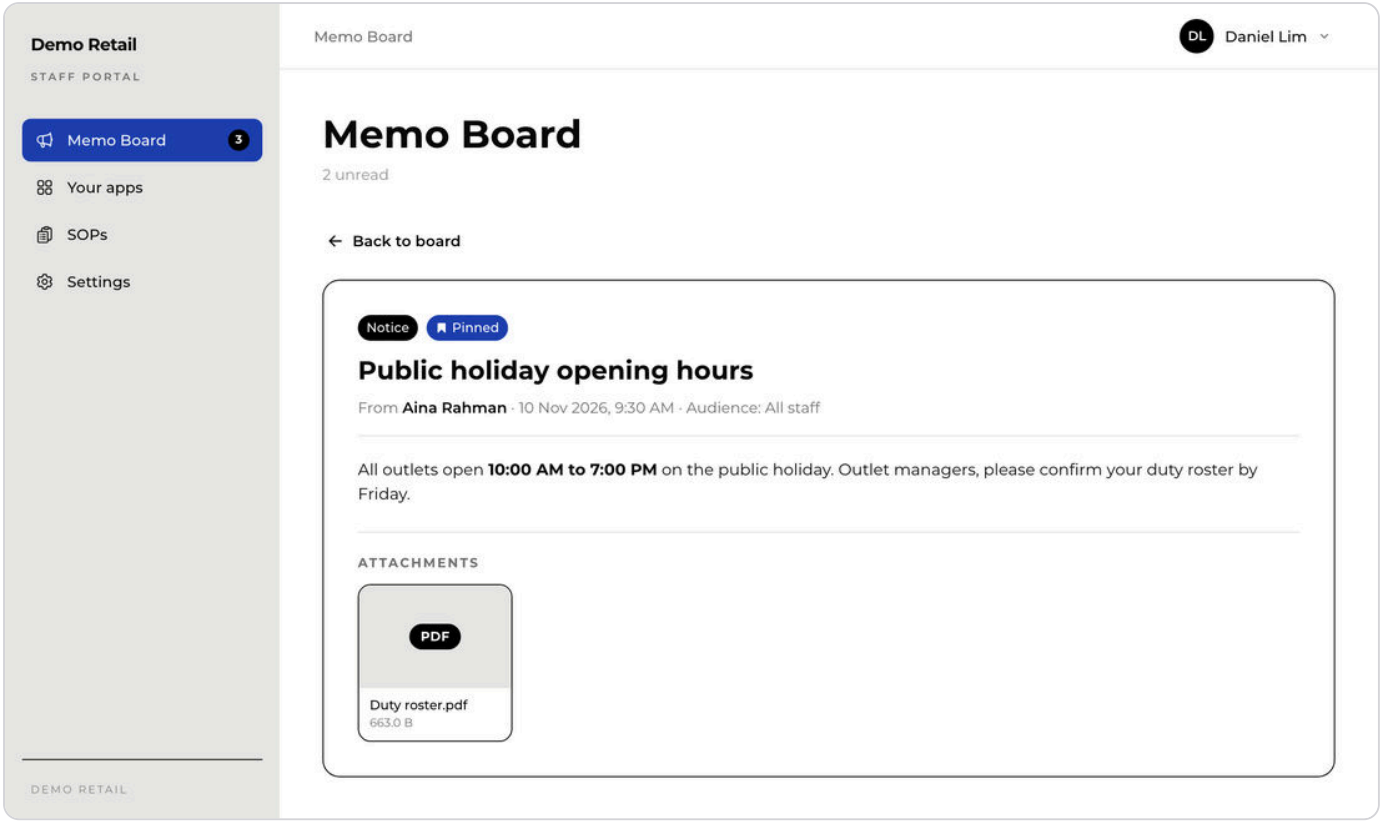
Find a memo

- Type in **Search title or content...**.
- Pick dates in **From** and **To**.

- Switch on **Unread only** to hide what you have read.
- Switch on **Needs acknowledgement** to see memos still waiting for your confirmation.
- Press **Clear** to remove the filters.

Open a memo

The memo shows who sent it, when, and who it is for (**Audience**). Files are listed under **Attachments**. Press a file to look at it or download it. Press **Back to board** to return.



You only see memos meant for you. Where you work (an outlet or head office), your department and your staff grade decide which ones.

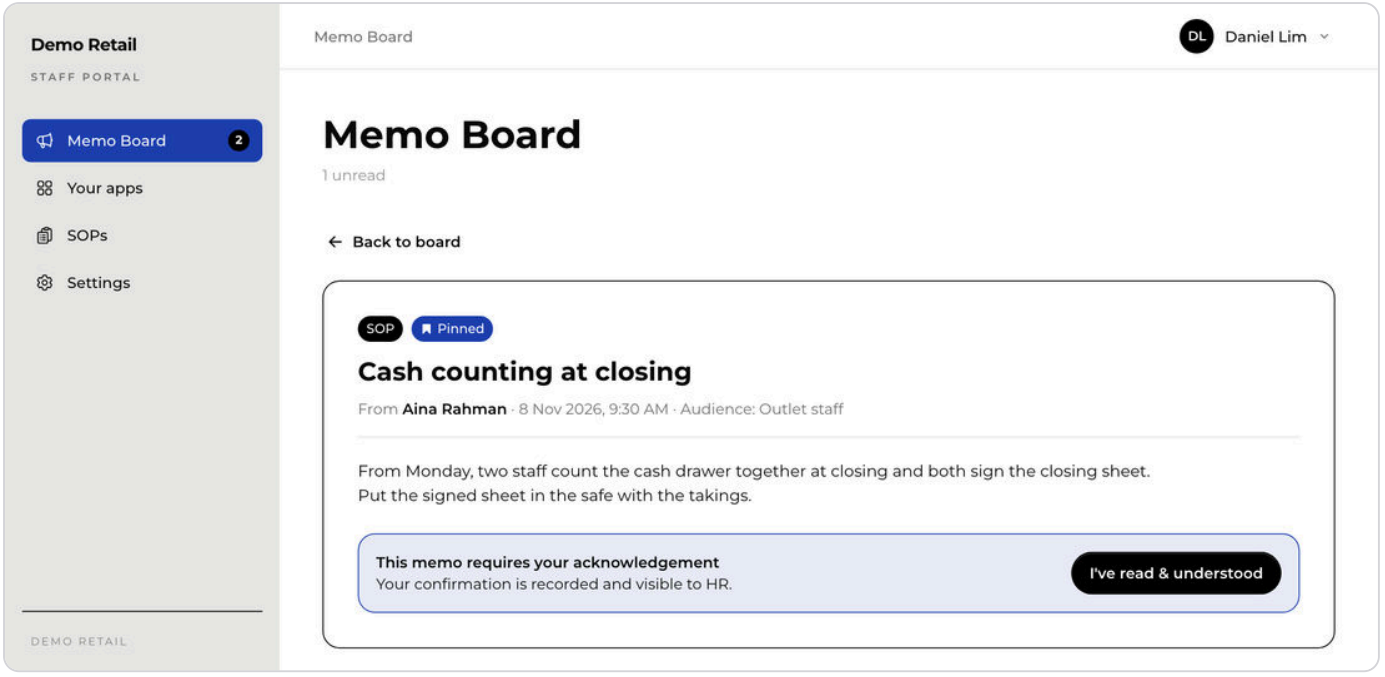
STAFF MEMO

Confirm you have read a memo

For: Staff

Some memos ask you to confirm that you have read them. HR sees who has confirmed and who has not.

1. Open the memo on the **Memo Board**.
2. Read it to the end.
3. Press **I've read & understood** in the box at the bottom.



The box changes to **Acknowledged** with the date and time. You cannot undo it.

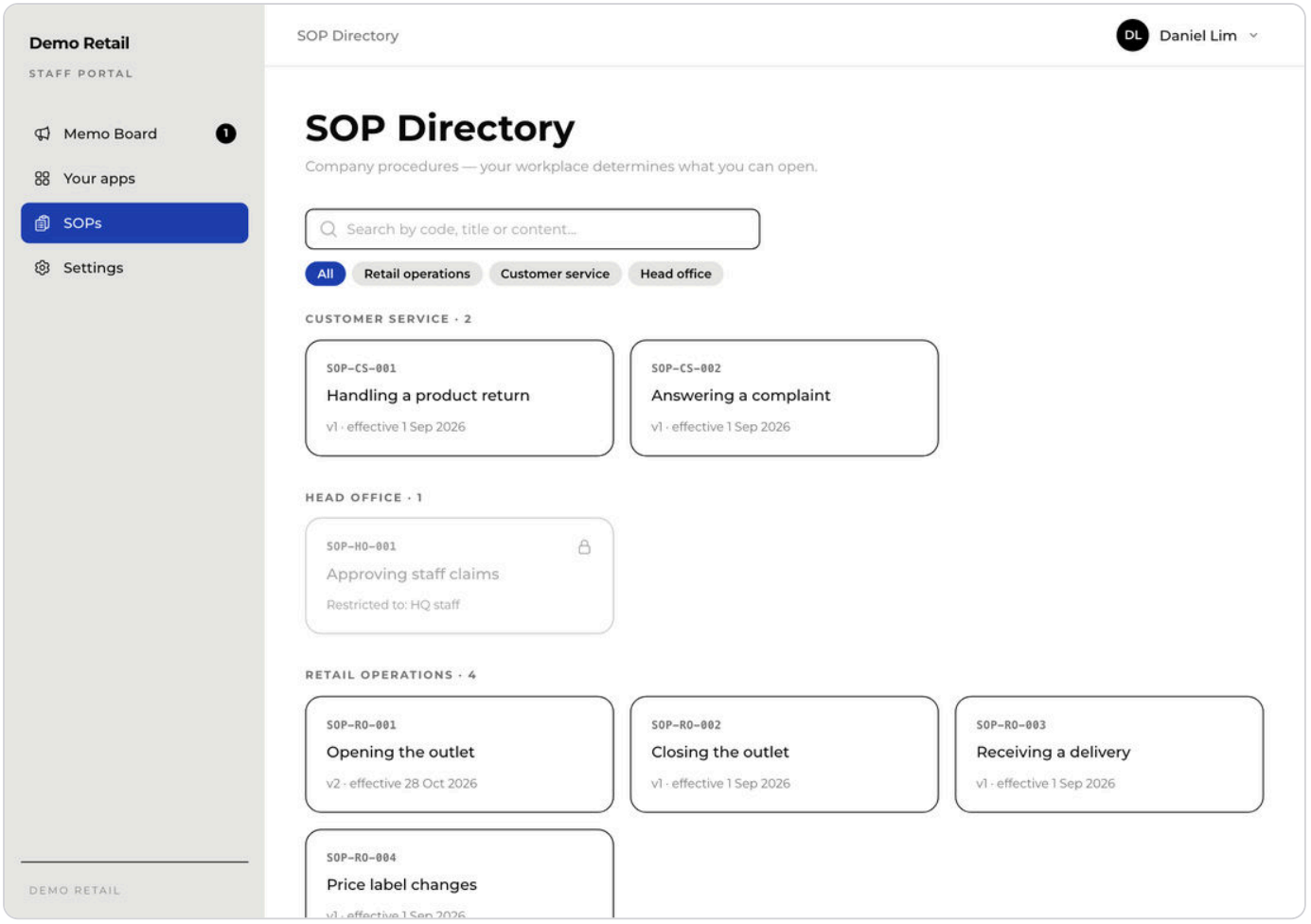
To find every memo still waiting for you, switch on **Needs acknowledgement** on the board.

STAFF MEMO

Find a procedure

For: Staff

1. Press **SOPs** in the menu on the left. The **SOP Directory** opens.
2. Type a code, title or word from the text into **Search by code, title or content…**, or press a category button such as **Retail operations**. Press **All** to see every category again.
3. Press a procedure to open it.



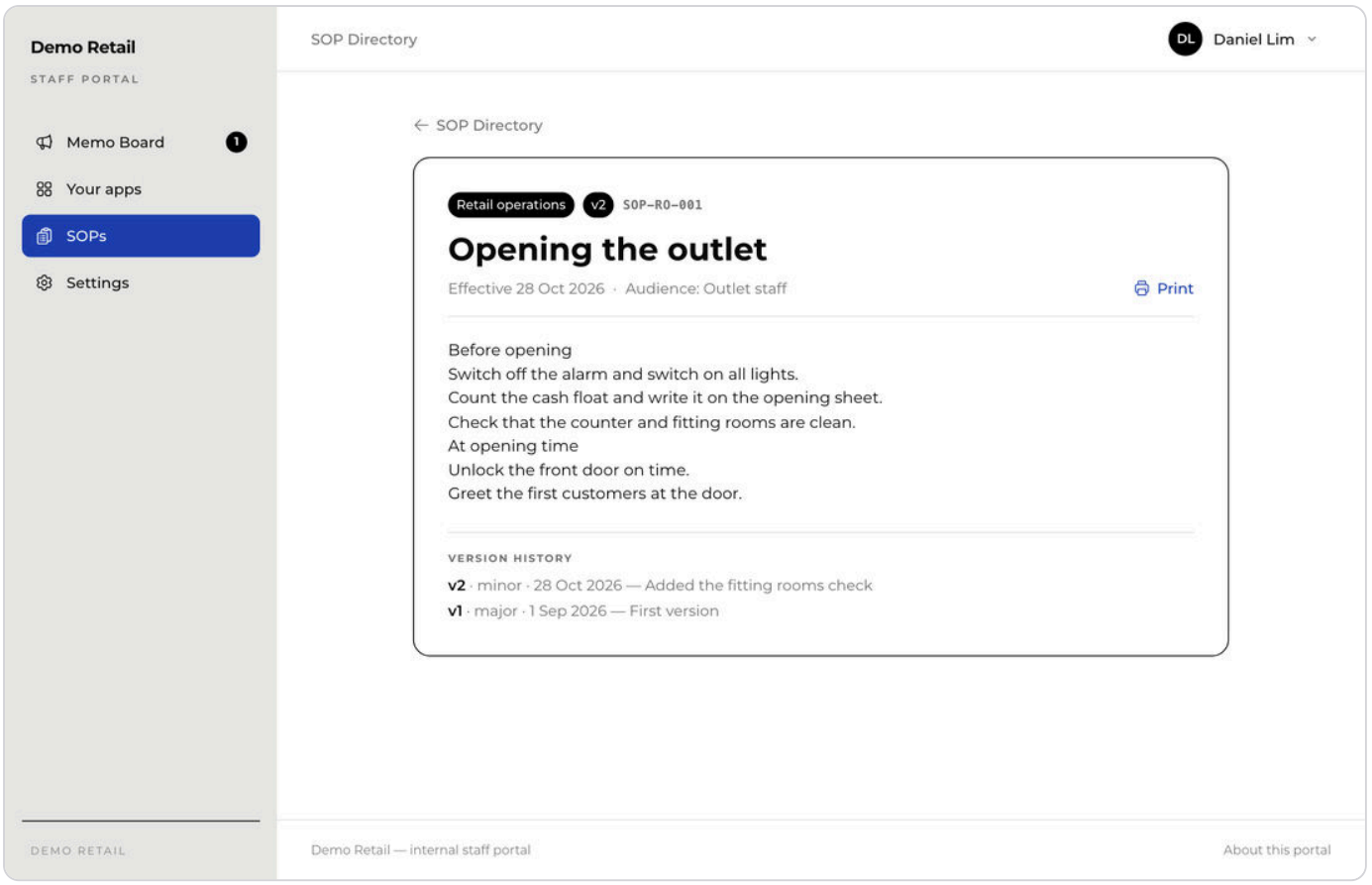
Each card shows the code (for example **SOP-RO-001**), the title, the version (**v2**) and the date it took effect.

A lock and **Restricted to: …** means the procedure is meant for another group, for example head office staff. See *Ask to read a locked procedure*.

Inside a procedure

- The top shows the category, the version, the code, the date it takes effect and who it is for.

- Press **Print** for a paper copy. If the procedure is a scanned document, the button is **Open PDF** instead.
- **Version history** at the bottom lists each version and what changed.



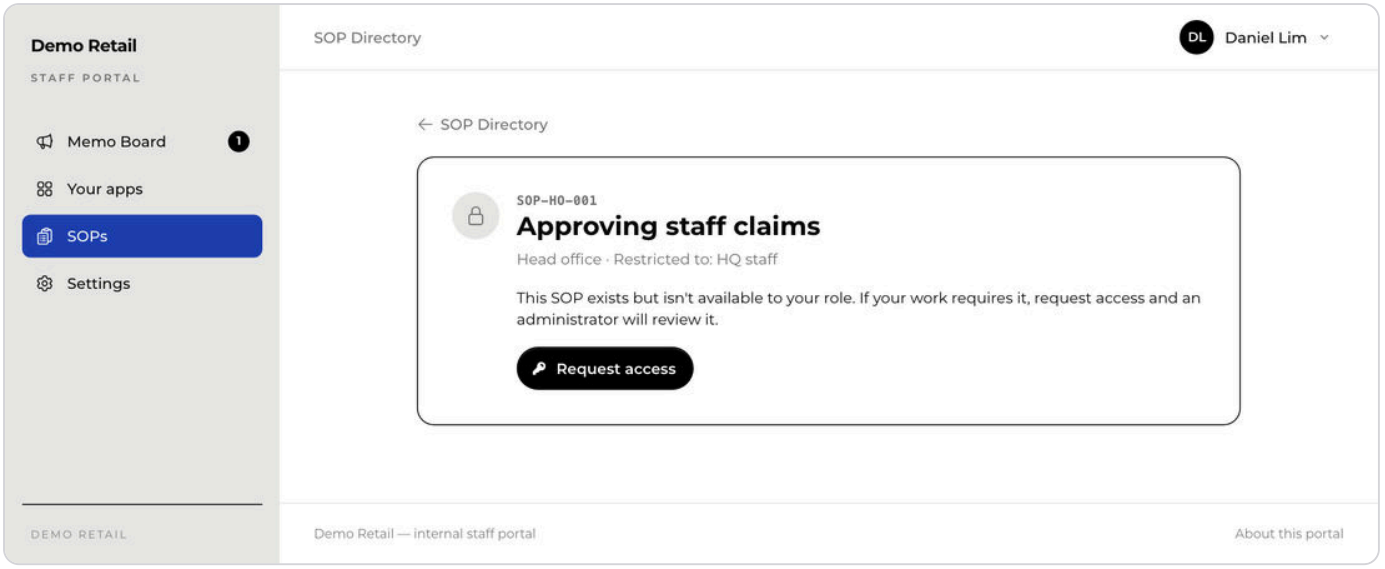
STAFF MEMO

Ask to read a locked procedure

For: Staff

Everyone can see the title of every procedure. Only the group it is meant for can open it. If your work needs a locked one:

1. Open it from the **SOP Directory**. You see its code, its title and who it is meant for.
2. Press **Request access**.



The button changes to **Request pending**. An administrator approves or refuses it, and you get an email with the answer if your account has an email address. Once approved, the procedure opens for you like any other.

STAFF MEMO

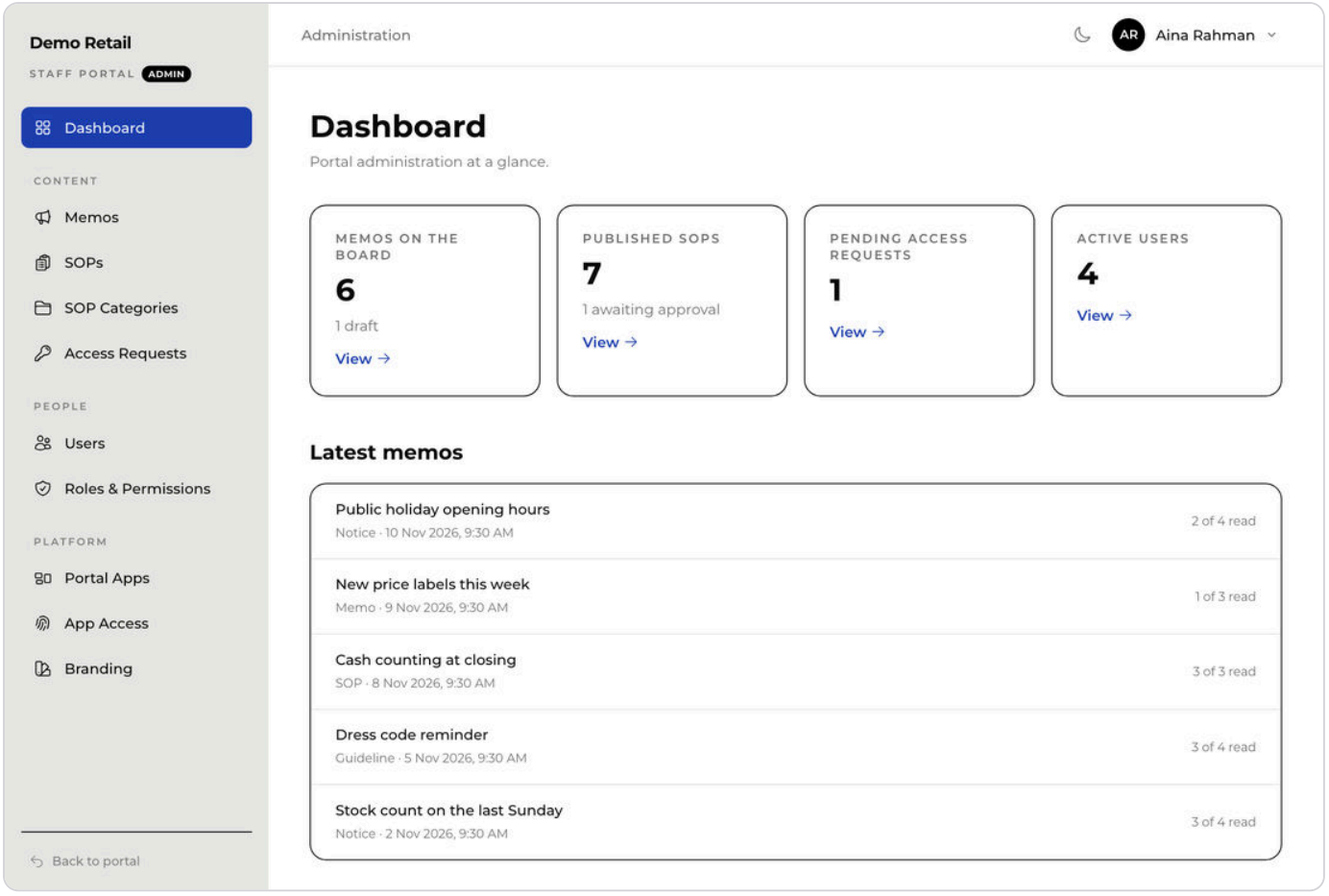
The admin area

For: Administrators

Only people with an admin role can open it. Everyone else gets "This action is unauthorized".

To open it, press **Administration** in the menu on the left, or press your name at the top right and choose **Administration**. It is also linked at the bottom of the front page.

The **Dashboard** shows memos on the board, published procedures, access requests waiting for an answer and active users. **Latest memos** shows how many people have read each one.



Menu	What you do there
Memos	Write, send, pin and follow up memos.
SOPs	Add procedures and publish new versions.
SOP Categories	The groups in the SOP Directory. Each has a short code that starts every procedure code in it, for example **RO** for SOP-RO-001.

Menu	What you do there
Access Requests	Staff asking to read a locked procedure.
Users	Each person's details and admin roles.
Roles & Permissions	What each admin role may do.
Portal Apps	The tiles on staff Home screens.
App Access	Who can open which app.
Branding	Your company name, logos, colour and front page text.

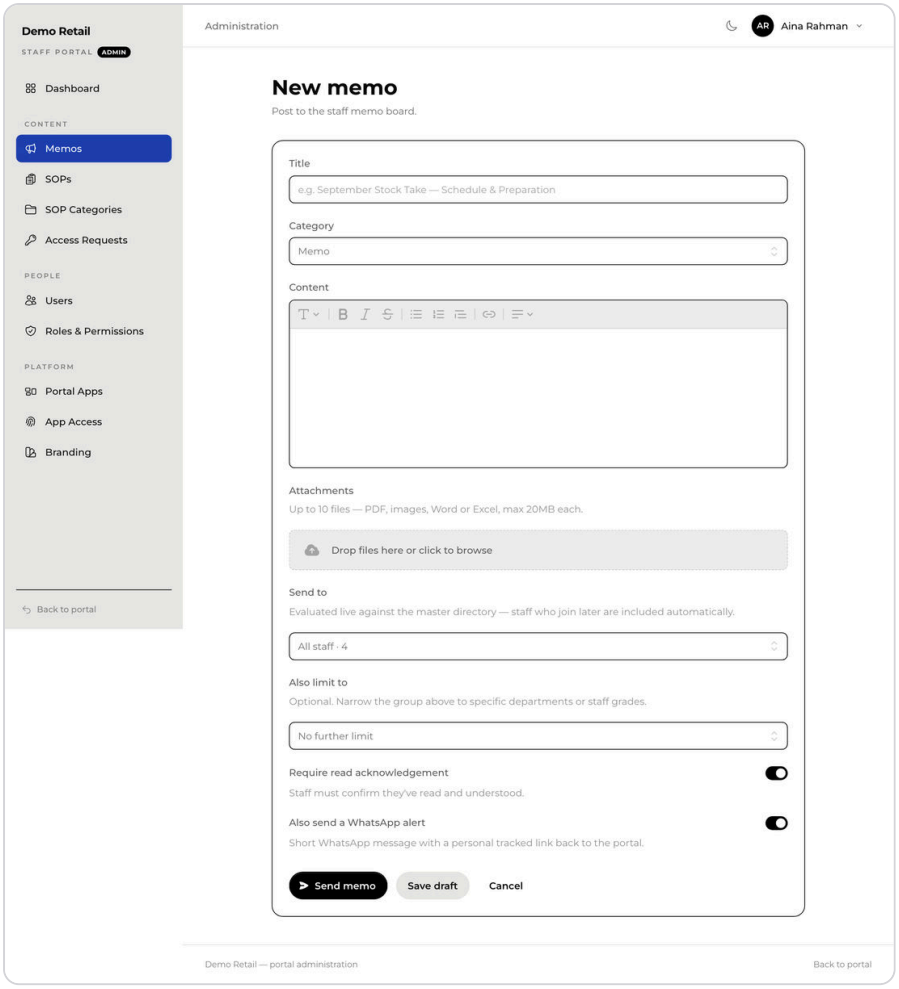
You only see the menu items your role allows. **Back to portal** at the bottom left returns you to your own screens.

STAFF MEMO

Post a memo

For: Administrators

1. In the admin area, press **Memos**, then **New memo**.
2. Fill in **Title** and pick a **Category**: **Memo**, **SOP**, **Guideline** or **Notice**.
3. Write the memo in **Content**. The toolbar above it adds bold, lists and links.
4. Add files under **Attachments** if needed: up to 10 files (PDF, pictures, Word or Excel), up to 20 MB each.
5. Under **Send to**, pick who sees it: **All staff**, **Outlet staff**, **HQ staff**, **Branch managers**, **Specific departments** or **Specific staff grades**. The number after each choice is how many people that is today.
6. To narrow it further, use **Also limit to**, for example outlet staff in one department only.
7. Switch on **Require read acknowledgement** if staff must confirm they have read it.
8. Switch on **Also send a WhatsApp alert** to send each person a short WhatsApp message with a link to the memo. This only works once your company's WhatsApp sender has been set up for the portal.
9. Press **Send memo** to put it on the board now, or **Save draft** to keep it hidden until later.



The audience is checked against the staff directory every time someone opens the board, so a person who joins later still sees the memo.

To send a draft later, open **Memos**, press ··· on its row and choose **Send memo**.

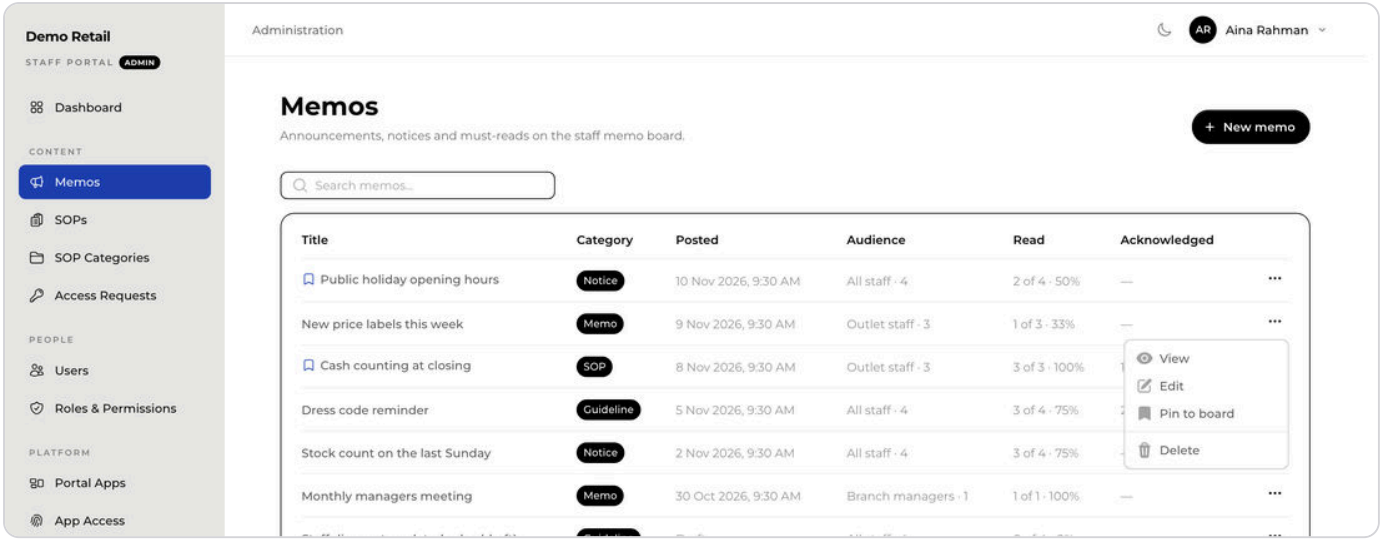
STAFF MEMO

Pin and follow up a memo

For: Administrators

Pin a memo to the top of the board

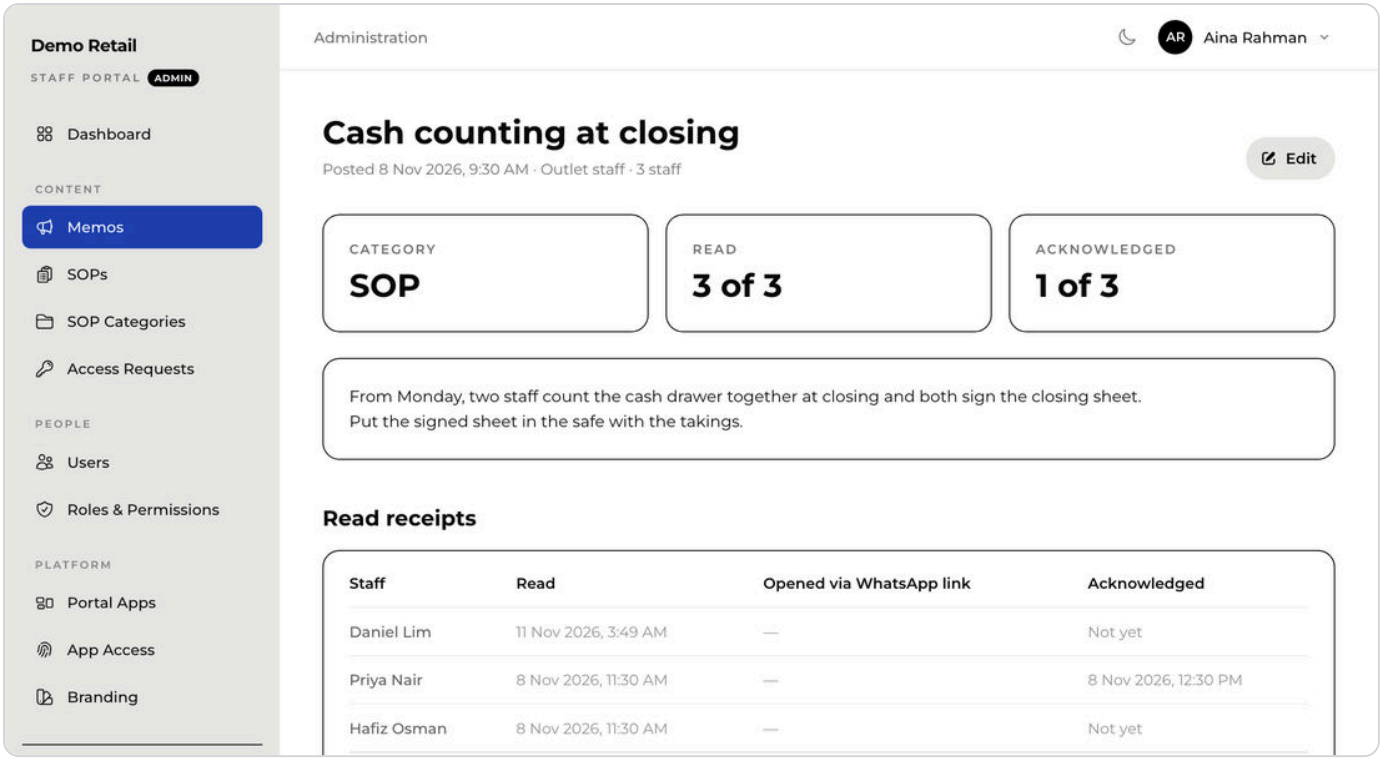
1. Press **Memos** in the admin area.
2. Press ⋯ at the end of the memo's row and choose **Pin to board**.



Up to two memos can be pinned at a time. To pin a third, first choose **Unpin from board** on one of the others. Only memos already sent can be pinned. A bookmark next to the title shows which memos are pinned.

See who has read it

The **Read** and **Acknowledged** columns show how many of the audience have opened and confirmed each memo. For names, press ⋯ and choose **View**.



Read receipts lists each person, when they read it, whether they came from the WhatsApp link, and when they confirmed it (**Not yet** if they have not).

Change or remove a memo

Press ⋯, then **Edit** to change it or **Delete** to remove it. Deleting also removes its read receipts.

STAFF MEMO

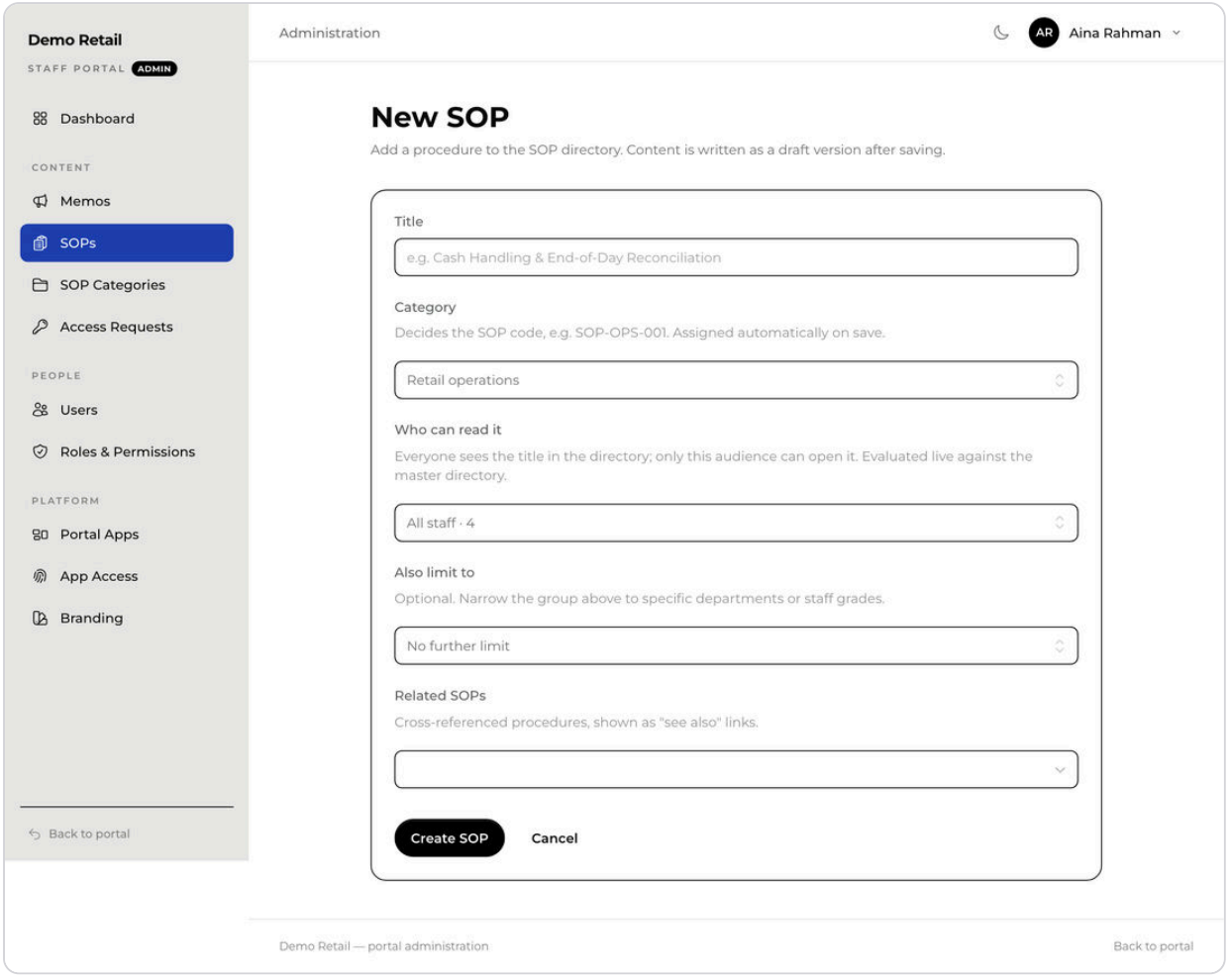
Add a procedure

For: Administrators

A procedure is added in two steps: first its details, then its content as a draft version.

Step 1: the details

1. In the admin area, press **SOPs**, then **New SOP**.
2. Fill in **Title**.
3. Pick a **Category**. It decides the code, which is given automatically when you save.
4. Under **Who can read it**, pick the group that can open it. Everyone else sees the title with a lock.
5. Use **Also limit to** to narrow it to some departments or staff grades.
6. Under **Related SOPs**, pick other procedures to show as links.
7. Press **Create SOP**. The procedure's own page opens.



Step 2: the content

1. On the procedure's page, open the **Versions** tab and press **New draft version**, then **Start draft**.
2. Press ⋯ on the draft's row and choose **Edit**.
3. Type the steps into **Content**, or attach a scan of the paper copy under **Scanned document** (PDF, JPG or PNG, up to 20 MB).
4. Fill in **What changed?** and, if needed, the **Effective date**. Switch on **Major revision** for a big change.
5. Press **Save version**.
6. Press ⋯ again and choose **Submit for review**.

The draft now waits for someone who can approve procedures. See *Approve and publish a procedure*.

If **Extract text with AI** appears in the menu for a scanned draft, it types the scan's text into the content for you. Check every line before you submit it. The option only shows when your company has switched it on.

Categories

Add or rename categories under **SOP Categories**. **Code prefix** is the short code at the start of each procedure code. **Sort order** decides the order in the directory.

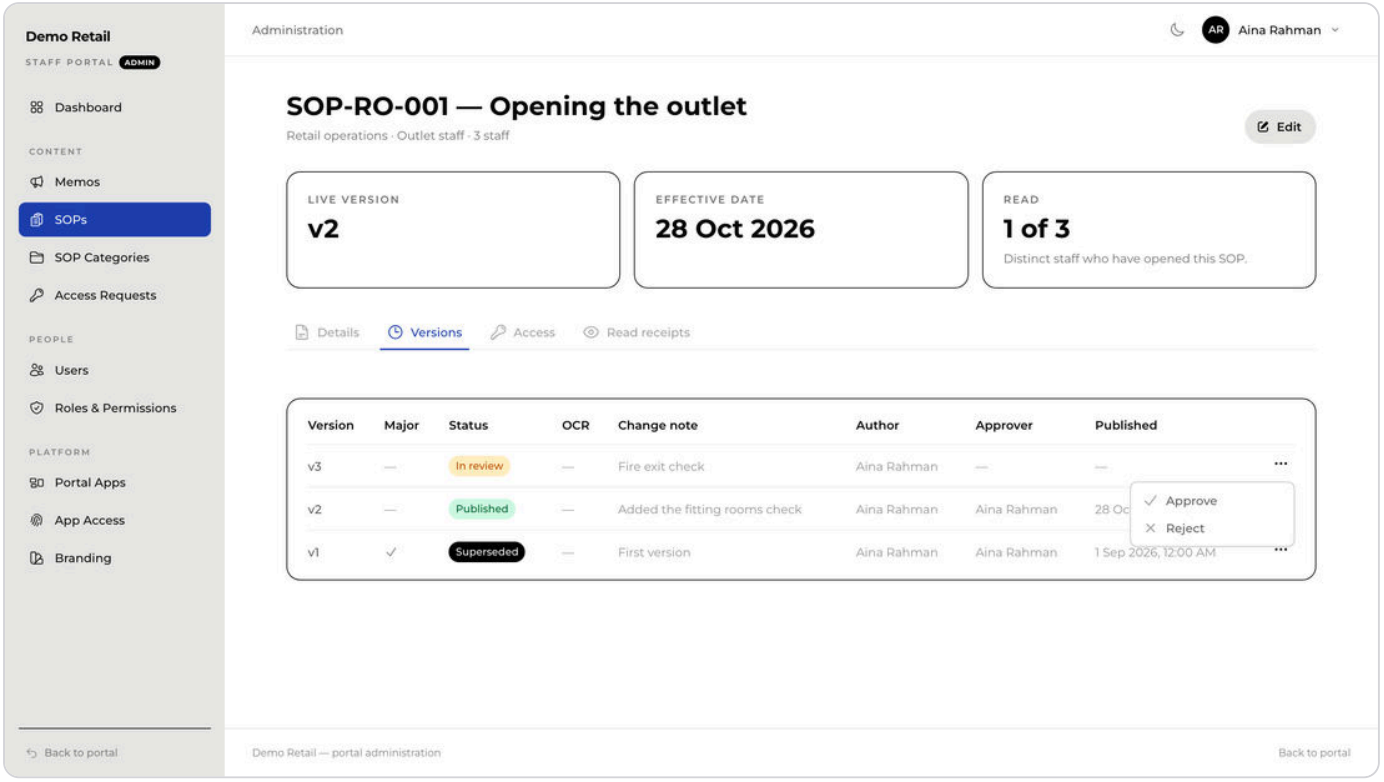
STAFF MEMO

Approve and publish a procedure

For: Administrators

A new version goes live in three steps: someone submits it, an approver approves it, and then it is published. You need the **Sop Approver** role (or **Super Admin**) to approve and publish.

1. In the admin area, press **SOPs**. A procedure with a version waiting shows it under **In progress**.
2. Open the procedure and the **Versions** tab.
3. Press ⋯ on the row marked **In review**.
4. Read it, then choose **Approve**, or **Reject** to send it back with a note saying why.
5. After approving, press ⋯ again and choose **Publish**. The version goes live in the directory straight away, and the old version is marked **Superseded**.



Change a live procedure

On the **Versions** tab, press **New draft version**. The draft starts with the live text, so you only change what is different. Fill in **What changed?**, press **Start draft**, then edit and submit it as in *Add a procedure*. Staff keep seeing the live version until the new one is published.

Who has read it

The **Read receipts** tab lists who has opened the procedure and which version they read.

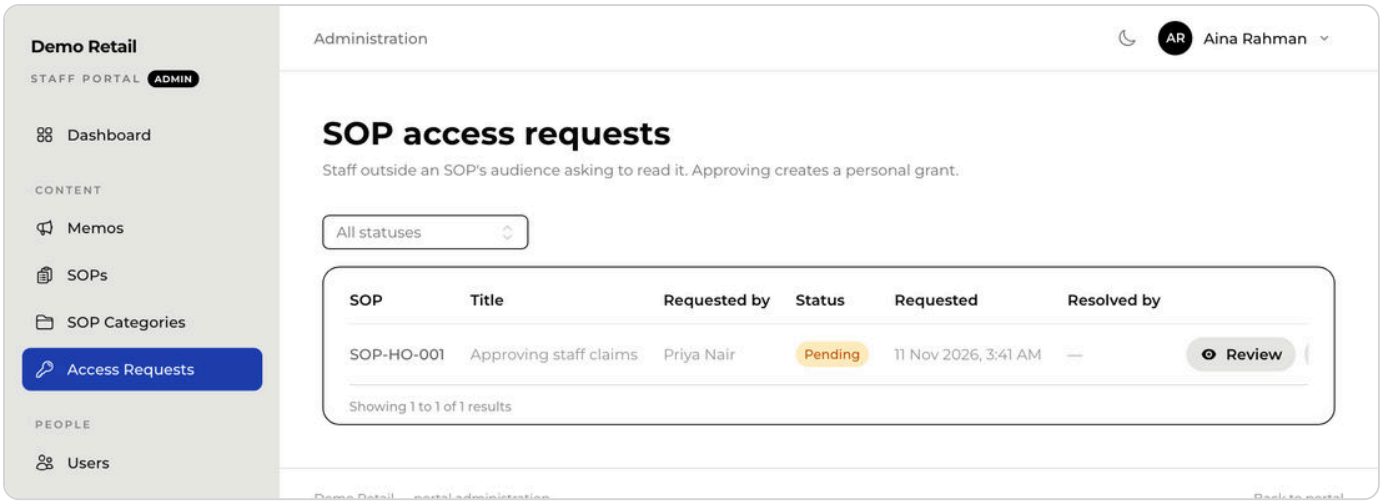
STAFF MEMO

Answer requests to read a procedure

For: Administrators

When a staff member presses **Request access** on a locked procedure, it appears here.

1. In the admin area, press **Access Requests**.
2. Press **Review** to look at the procedure first, if needed.
3. Press **Approve** to let that person read it, or **Deny** to refuse.



The person gets an email with the answer if their account has an email address. Approving gives that one person access to that one procedure. Nobody else changes.

Use **All statuses** to see past requests.

Give access without a request

Open the procedure, go to the **Access** tab and press **Grant access**. Pick the person and press **Grant access** again. To take it back, press **Revoke** next to their name under **Extra access grants**.

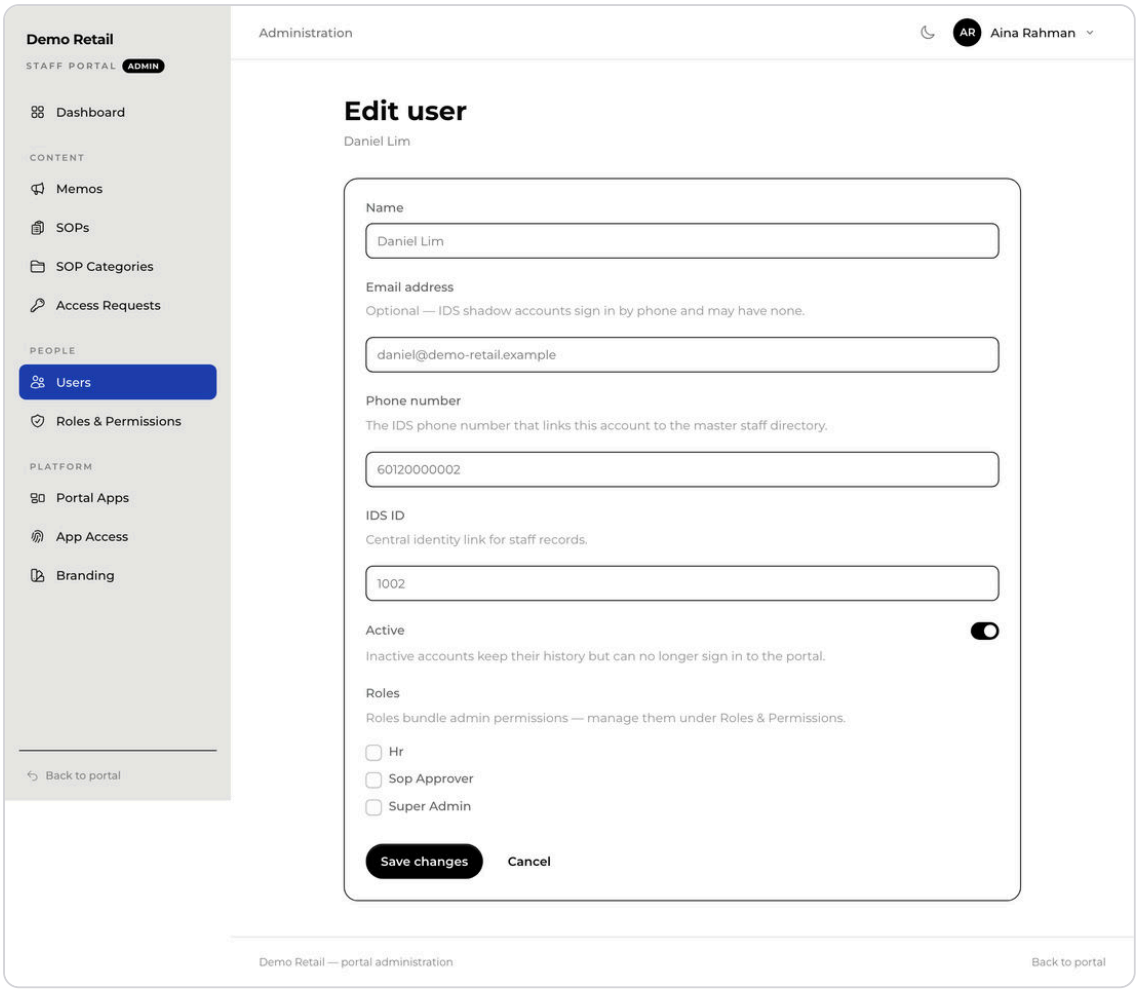
STAFF MEMO

Give someone admin rights

For: Administrators

Staff appear under **Users** after they sign in for the first time.

1. In the admin area, press **Users**.
2. Press the person's name.
3. Under **Roles**, tick the roles they need.
4. Press **Save changes**.



The roles that come with it:

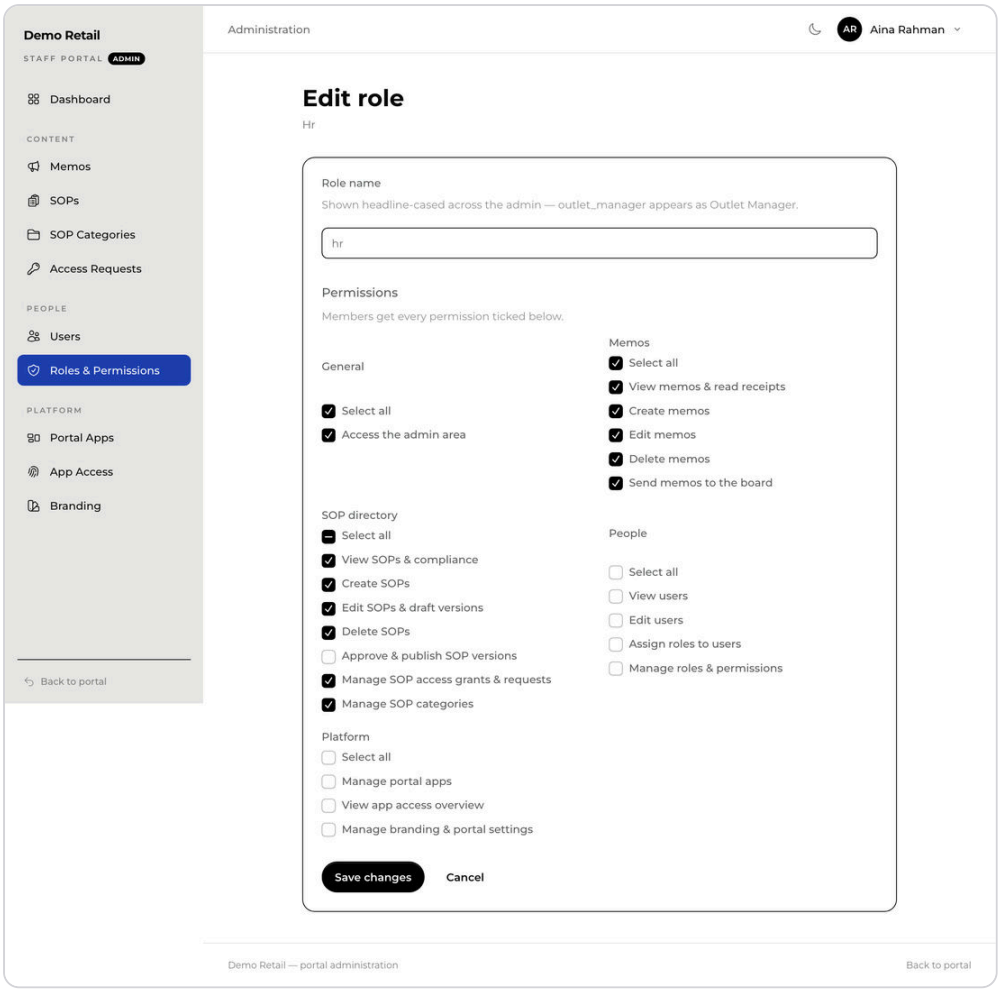
Role	What the person can do
Hr	Write and send memos, add and edit procedures, answer access requests and manage categories. Cannot approve or publish procedures.
Sop Approver	See procedures, approve and publish versions.

Role	What the person can do
Super Admin	Everything.

Switch off **Active** to stop someone signing in to the portal. Their history is kept.

Change what a role can do

1. Press **Roles & Permissions**, then a role, or **New role** for a new one.
2. Tick what the role may do. Each tick is one thing, for example **Send memos to the board** or **Approve & publish SOP versions**.
3. Press **Save changes**. Everyone with that role gets the change.



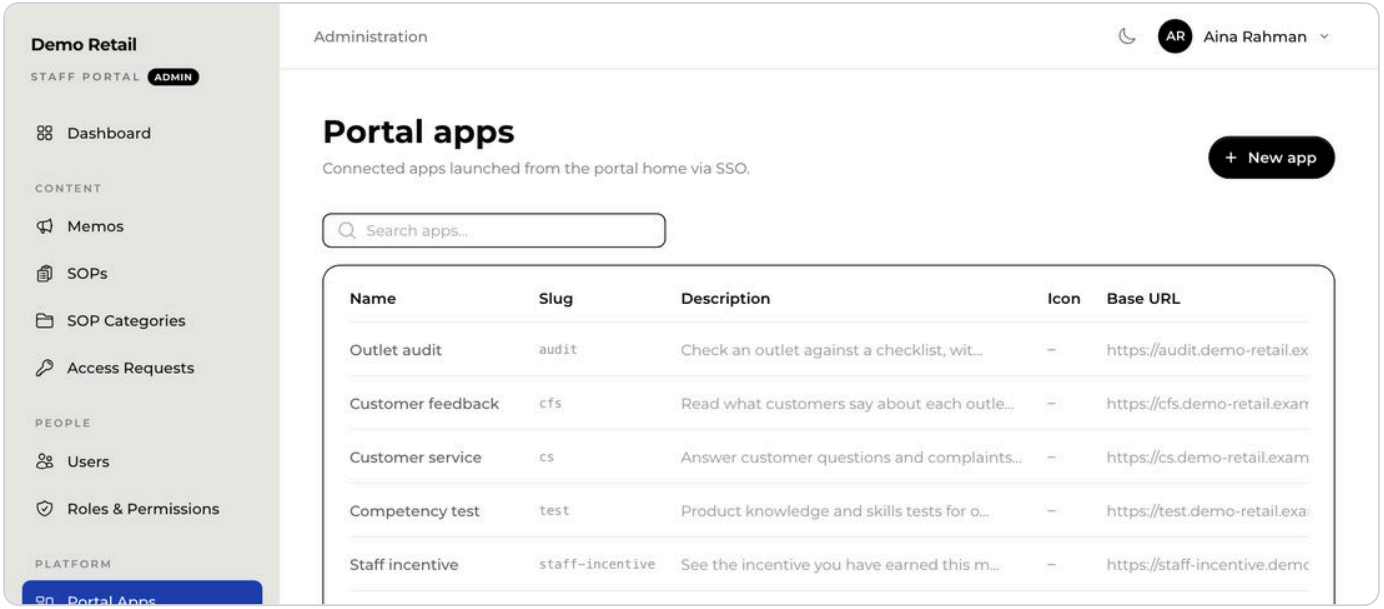
STAFF MEMO

Connect an app to Home

For: Administrators

Each tile on staff Home screens is set up here.

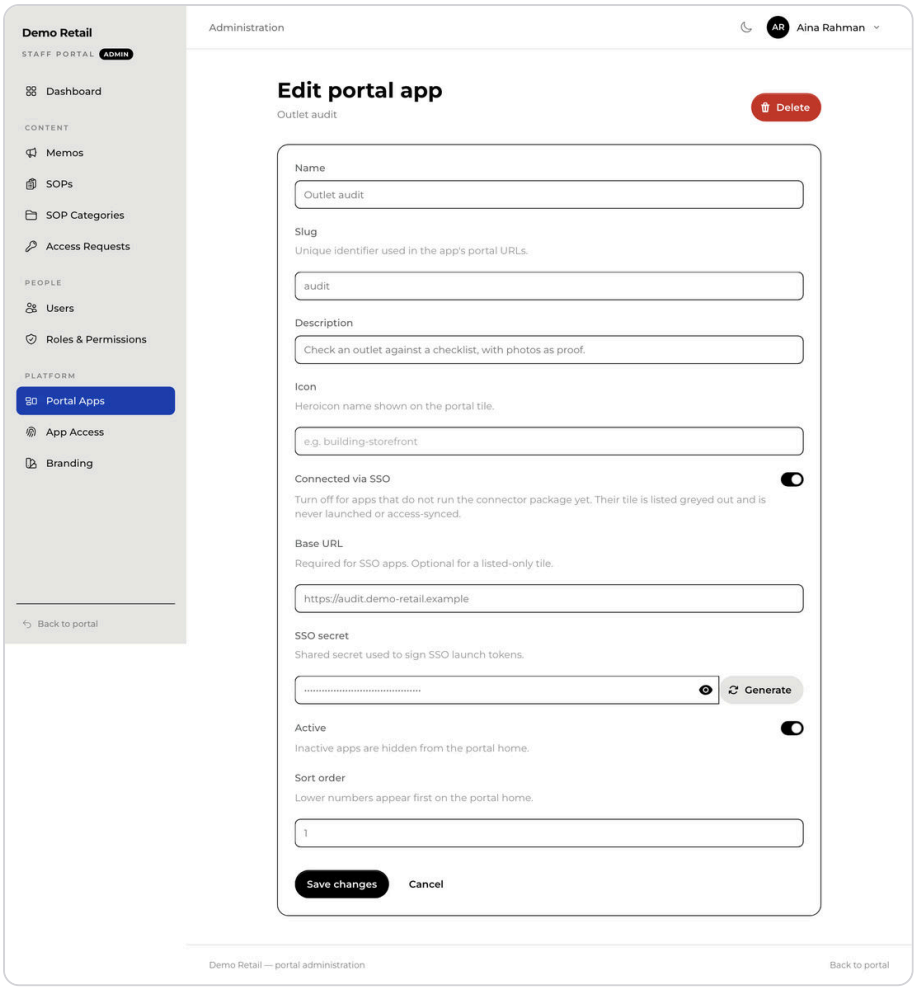
1. In the admin area, press **Portal Apps**.
2. Press **New app**, or press an app to change it.



3. Fill in the settings and press **Save changes**.

Setting	What it changes
Name, **Description**	What staff see on the tile.
Slug	The app's short name. It must match the short name set inside the app. Do not change it once staff use the app.
Connected via SSO	Switch it on when the app is ready to open straight from Home without a second sign-in. While it is off, the tile shows **Not connected yet** and cannot be opened.
Base URL	The app's web address. Needed when **Connected via SSO** is on.
SSO secret	A shared key that proves the portal sent the person. Press **Generate**, then enter the same key in the app's own setup. If the two differ, staff cannot open the app.
Active	Switch it off to hide the tile from everyone.

Setting	What it changes
Sort order	Lower numbers come first on Home.

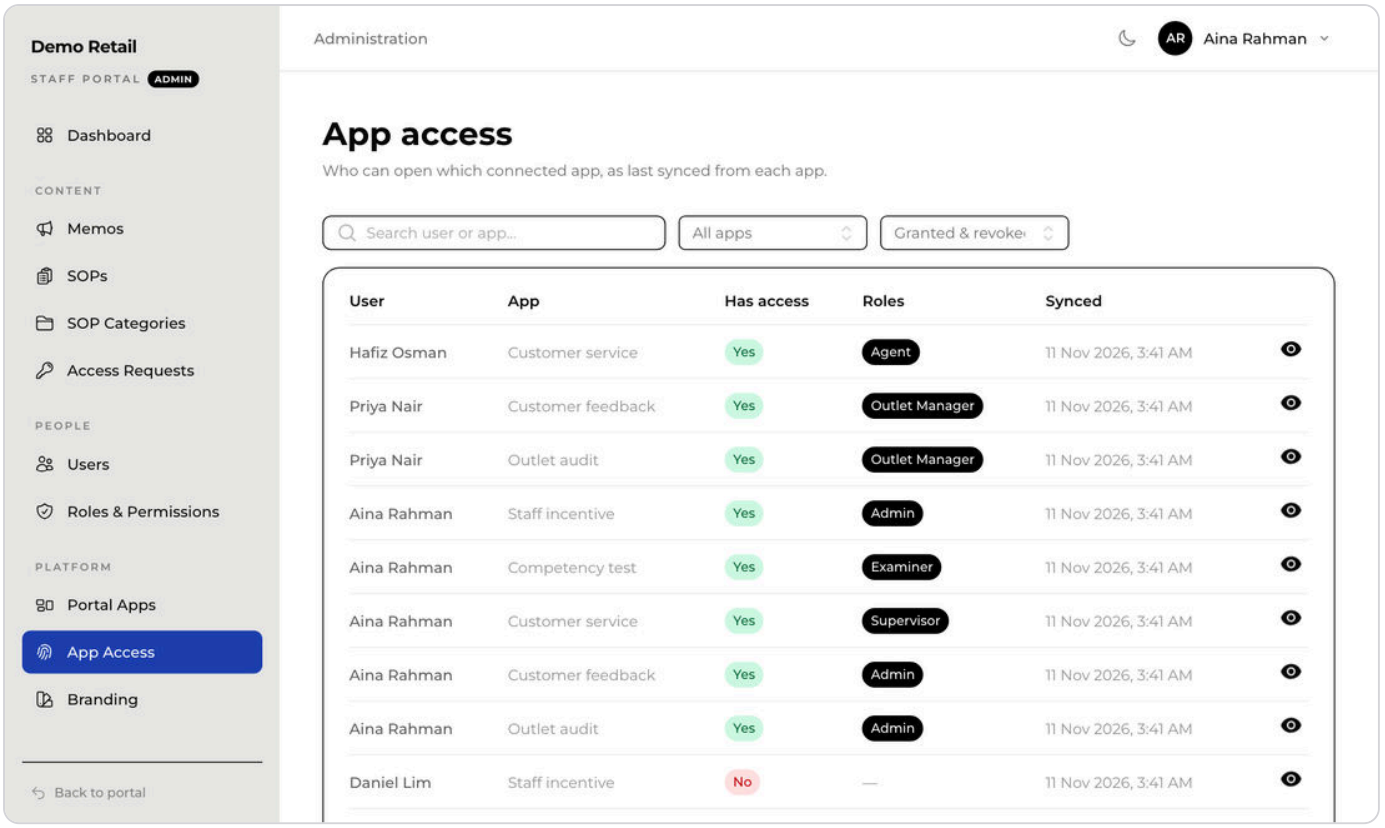


STAFF MEMO

See who can open each app

For: Administrators

App Access lists, for each person, which apps they can open and their role inside each.



You cannot change access here. Each app decides who may use it: change it inside the app, and it shows here the next time that person signs in, or after the nightly check at 2 am.

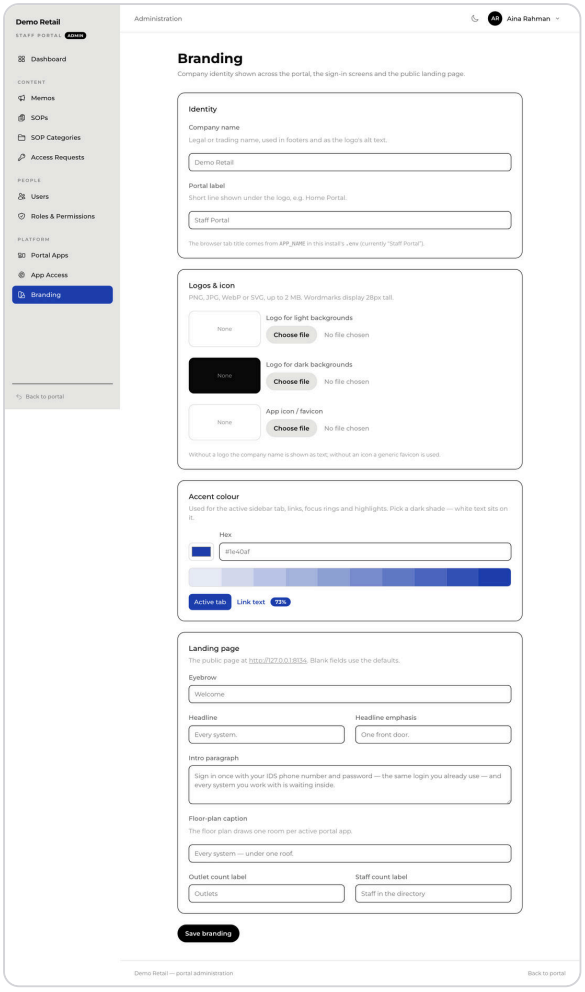
- Type a name or an app in **Search user or app...**.
- Narrow the list with **All apps** and **Granted & revoked**.
- Press the eye at the end of a row to see its details.

STAFF MEMO

Change your branding

For: Administrators

1. In the admin area, press **Branding**.
2. Change what you need, then press **Save branding** at the bottom.



Section	What it changes
Identity	**Company name** shows in footers and in place of a logo. **Portal label** is the small line under it.
Logos & icon	A logo for light backgrounds, one for dark backgrounds, and the small icon in the browser tab. PNG, JPG, WebP or SVG, up to 2 MB. Without a logo, the company name is shown as text.
Accent colour	The colour of the highlighted menu item, links and buttons. Pick a dark shade so white text stays readable. The preview below shows the result.

Section	What it changes
Landing page	The text on the public front page: the small line above the headline (**Eyebrow**), the headline, the paragraph under it, the picture caption and the two count labels. Leave a box empty to use the standard text.

The name in the browser tab is set when the portal is installed, not here. Ask IT to change it.

USER GUIDE · VERSION 1

KPI board

Set each outlet's monthly sales targets, share them out to the staff, and record the sales against them. The same app holds task boards for team work such as openings and campaigns.

1. What it is for
2. Set an outlet's yearly budget
3. Share an outlet's target with your staff
4. Record your sales
5. Record your outlet's sales
6. Read the sales report
7. Load the monthly sales
8. Work on a task board
9. Give people access

What it is for

For: Everyone

KPI board does two jobs.

Sales targets (KPI, key performance indicators). Head office sets each outlet's sales target for every month of the year. An outlet manager can share their outlet's target between the people who work there. Each month, the sales are recorded against the targets, and everyone can see how far ahead or behind they are.

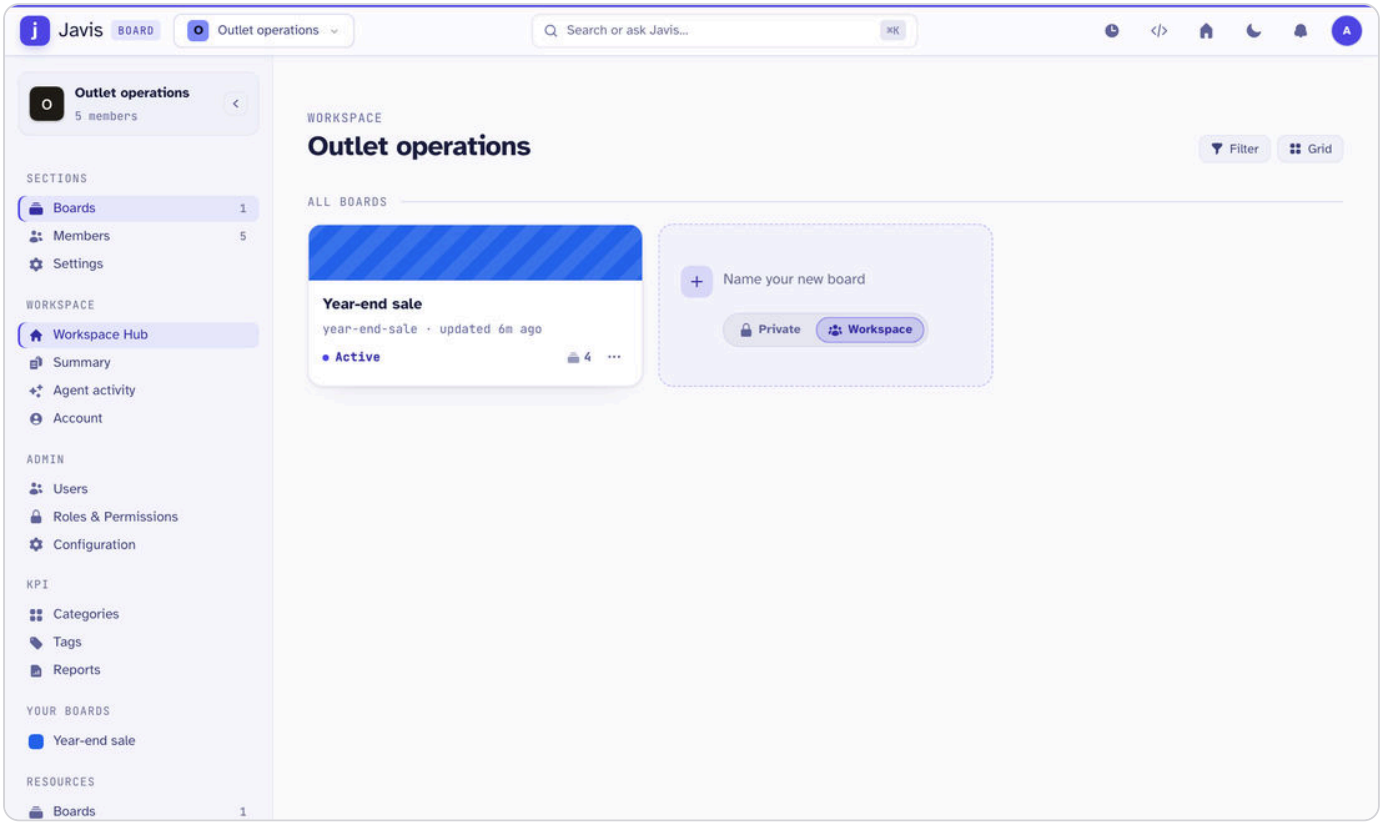
Targets work on three levels:

1. **HQ** (head office): the whole company, which is the outlets added up.
2. **Outlet**: one shop's target, set by HQ.
3. **Staff**: one person's share of their outlet's target, set by the outlet manager. This level is optional.

Sales are typed on the lowest level only. Every level above is the total of the one below.

Task boards. A board is a set of lists, such as **To do**, **Doing** and **Done**, with a card for each task. Teams use them for work such as a sale, an opening or a refit.

The app's name at the top of the screen is **Javis Board**.



Who uses it

Role on screen	What they do
KPI - Staff	See their own target and record their own sales.
KPI - Manager	Share their outlet's target with staff and record the outlet's sales.
System Admin	Set outlet budgets, load the monthly sales, and manage KPI categories.
Owner, **Admin**, **Member**, **Guest**	Roles on the task boards, from full control to read and comment.

Shop staff and outlet managers see a short bar at the top with **Targets**, **Actuals** and **Reports**. Head office and administrators see the full menu on the left.

What it needs from other modules

- You sign in with the same phone number and password you use for your other work apps.
- Outlets, staff and who manages which outlet come from your company's staff records. Your login is matched to your staff record by phone number. If you see no outlets, ask HR to check the phone number on your staff record.

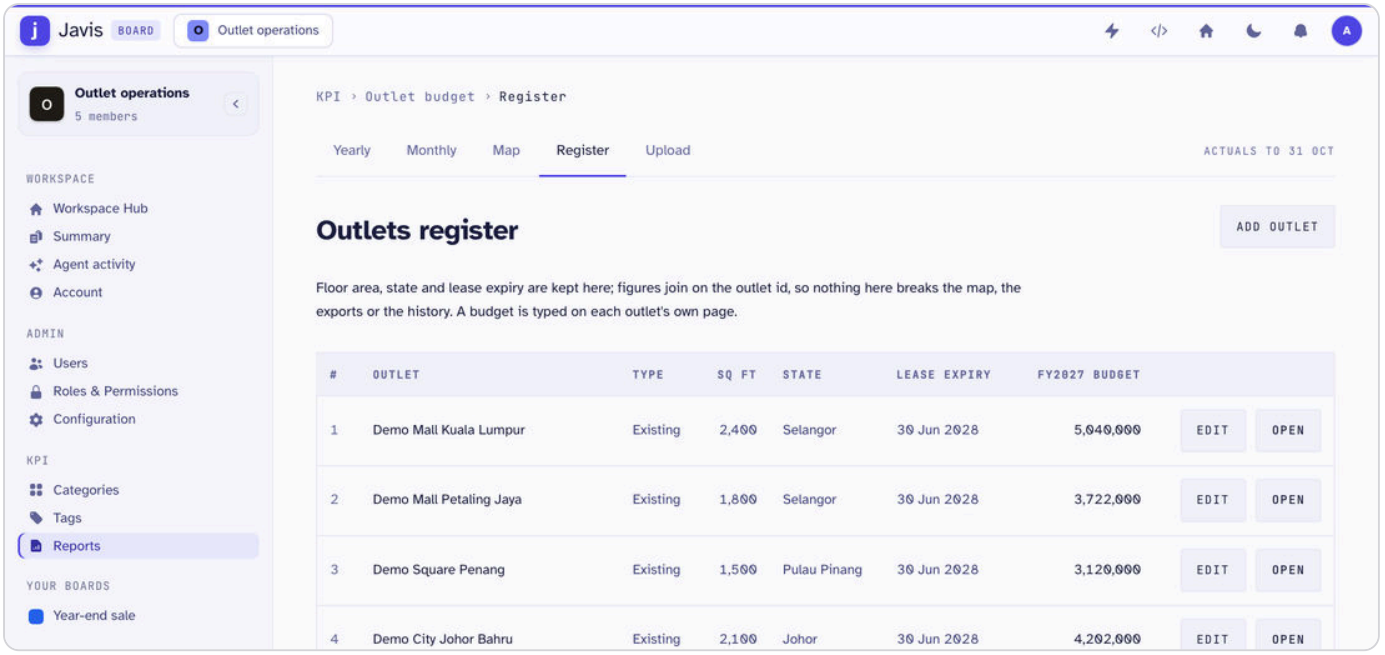
KPI BOARD

Set an outlet's yearly budget

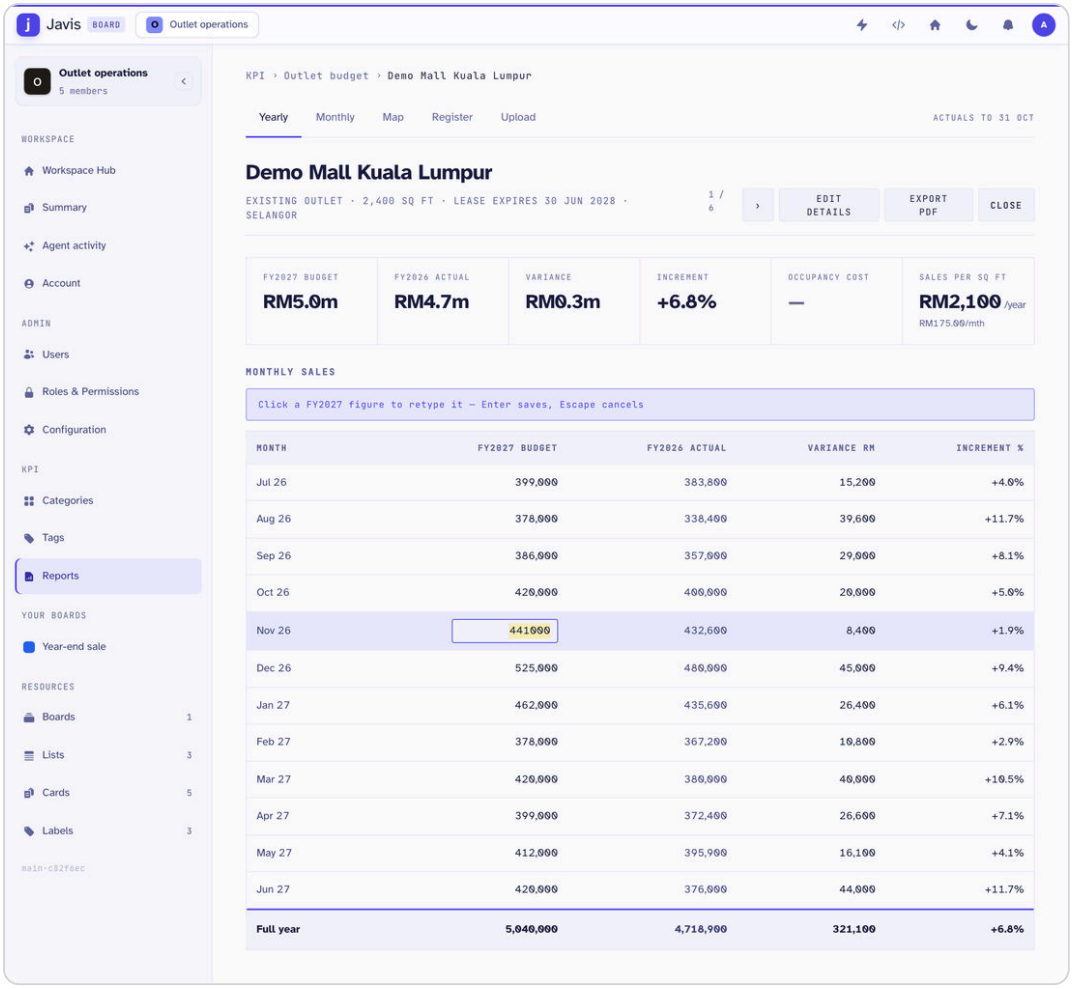
For: Head office

Each outlet's sales target for the year is typed month by month on the outlet's own page.

1. Open **Reports** in the menu on the left, then the **Register** tab.
2. Press **Open** on the outlet's row.



3. Under **Monthly sales**, click a figure in the budget column. It becomes a box.
4. Type the new figure and press **Enter** to save it. Press **Escape** to cancel.



The yearly total, the difference from last year and the targets on the KPI screens update straight away. Use **›** at the top right to move to the next outlet.

Change an outlet's details

On the **Register** tab, press **Edit** on the outlet's row to change its floor area, state or lease expiry. Press **Apply change**, then **Confirm — save to database**.

To plan a target for a shop that has not opened yet, press **Add outlet**. Outlet names come from your company's staff records and cannot be changed here.

You need a permission to change budgets and another to change outlet details. Without them, the figures can be read but not changed.

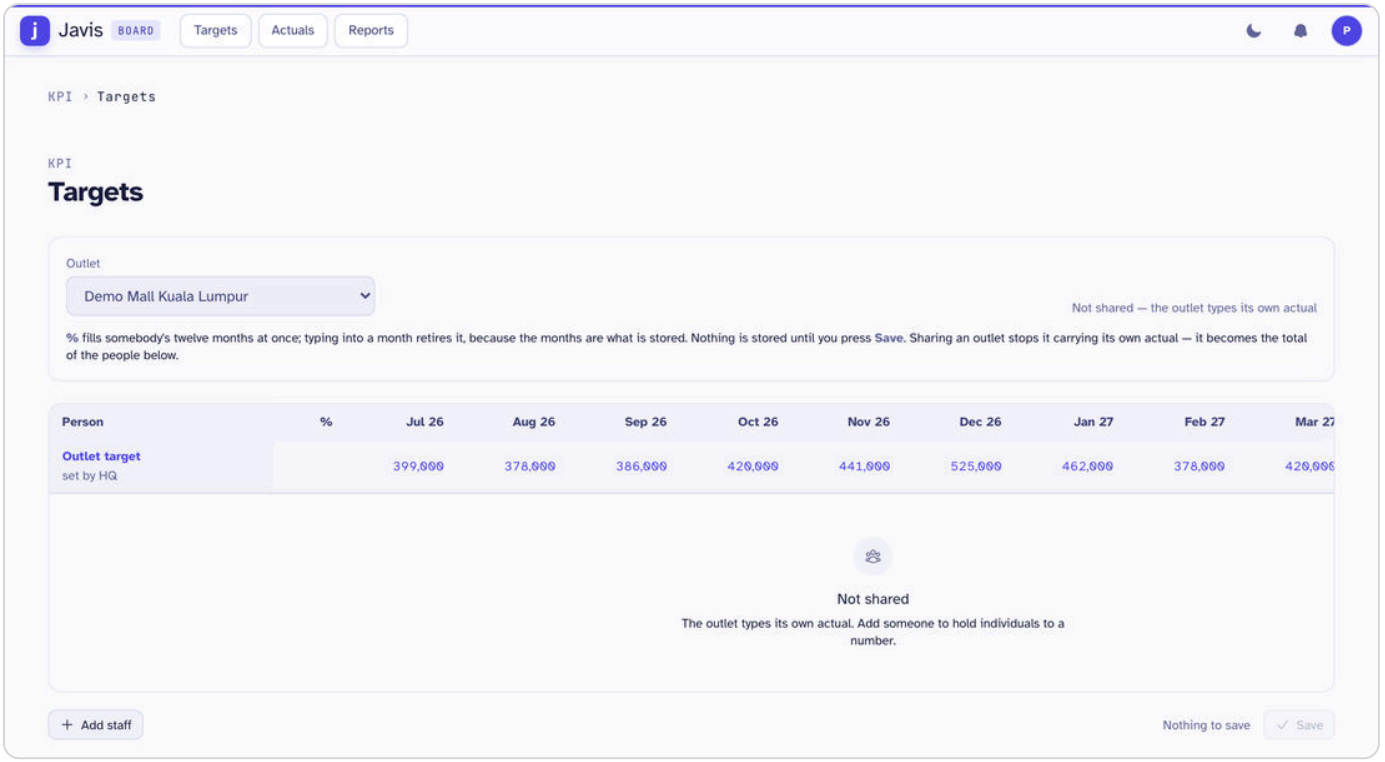
KPI BOARD

Share an outlet's target with your staff

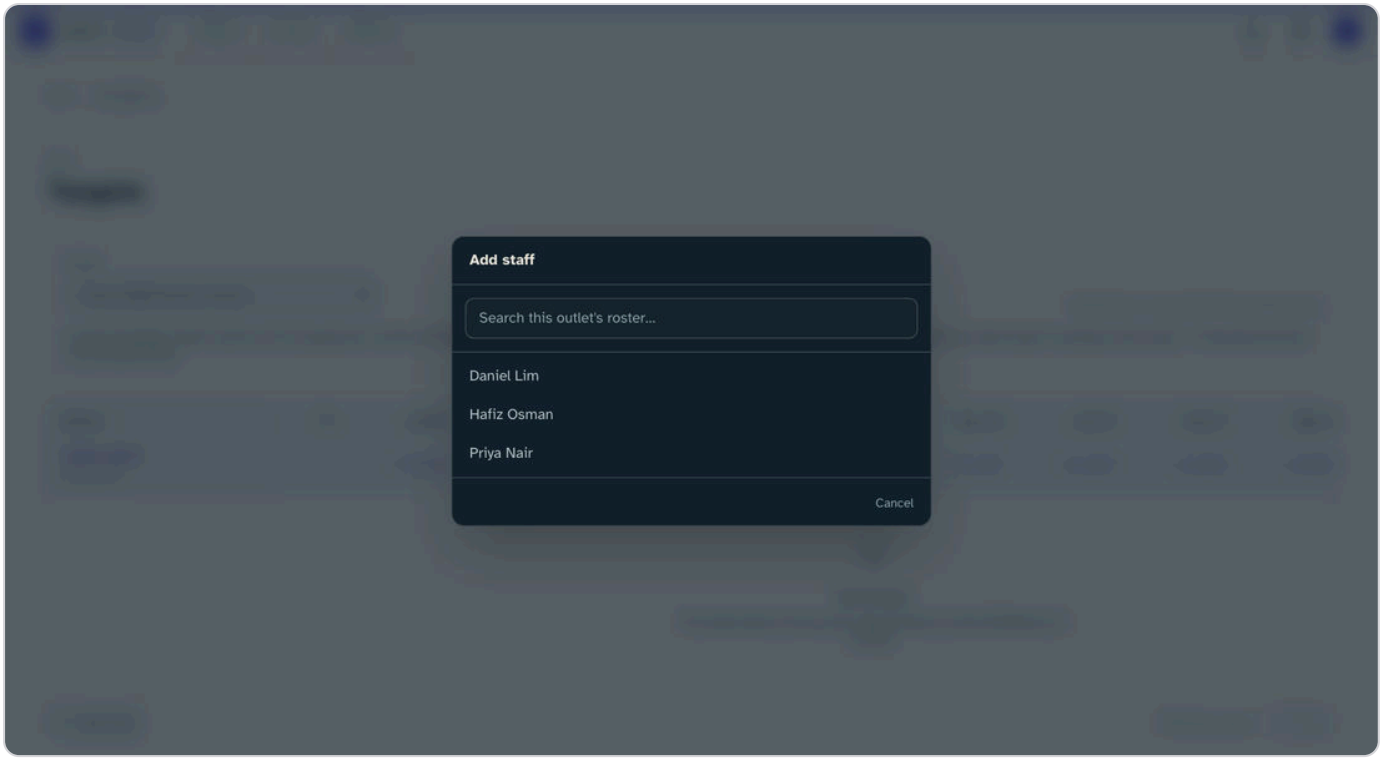
For: Outlet managers

Your outlet's target is set by head office. You can leave it as one target for the whole outlet, or share it between the people who work there. Sharing is optional.

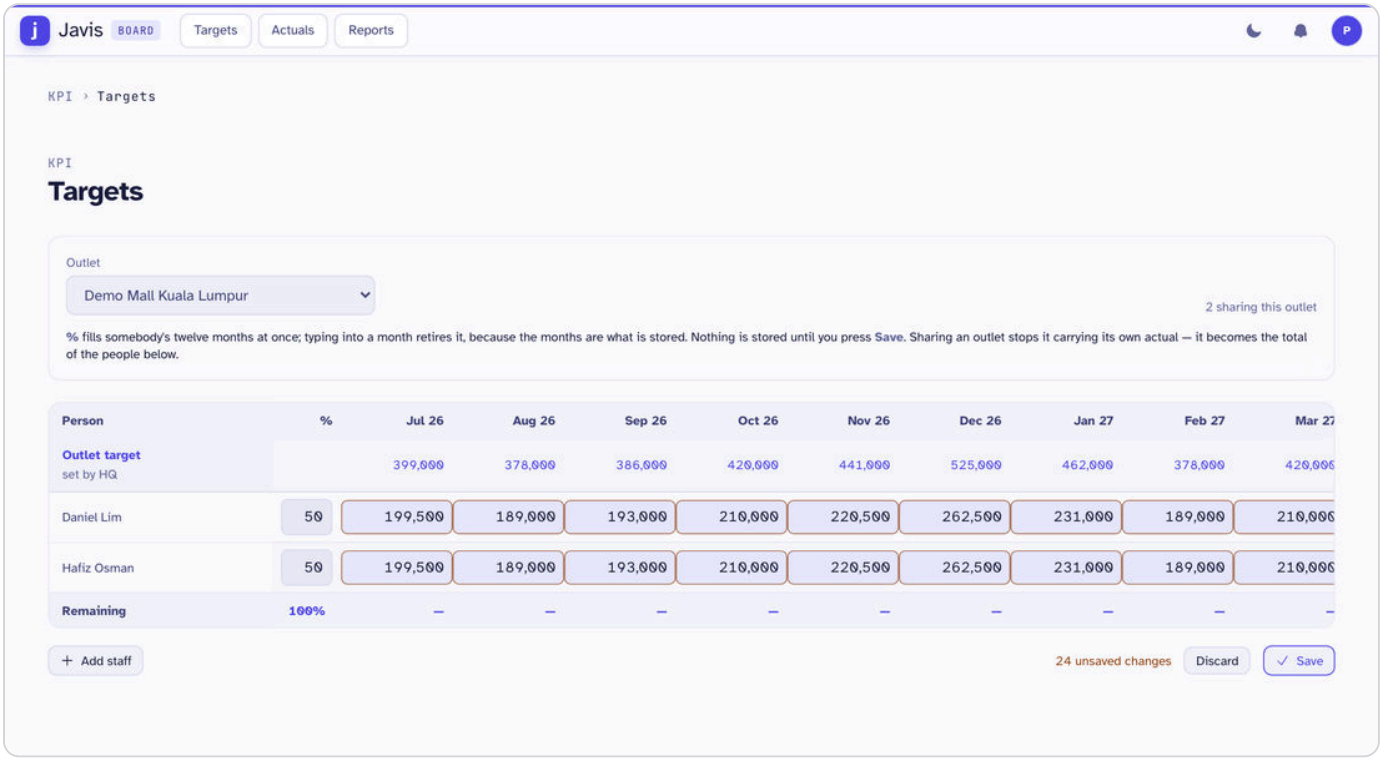
1. Press **Targets** at the top of the screen.
2. Choose your outlet under **Outlet**. The **Outlet target** row shows what head office set for each month.



3. Press **Add staff** and choose a person from your outlet. Repeat for each person.



4. Type a share in the **%** box on each person's row, for example **50** for half. It fills all twelve months for that person. To set one month by hand, click that month and type a figure.
5. Check the **Remaining** row. It must show a dash in every month, which means the shares add up to the outlet target.
6. Press **Save**. Nothing is stored until you do. **Discard** puts the sheet back as it was.



Changed figures have a coloured edge until you save. If the shares do not add up, the sheet names the months that are wrong and does not save.

Once a target is shared, each person records their own sales, and the outlet's sales become their total. To take someone off, press the cross at the end of their row and save.

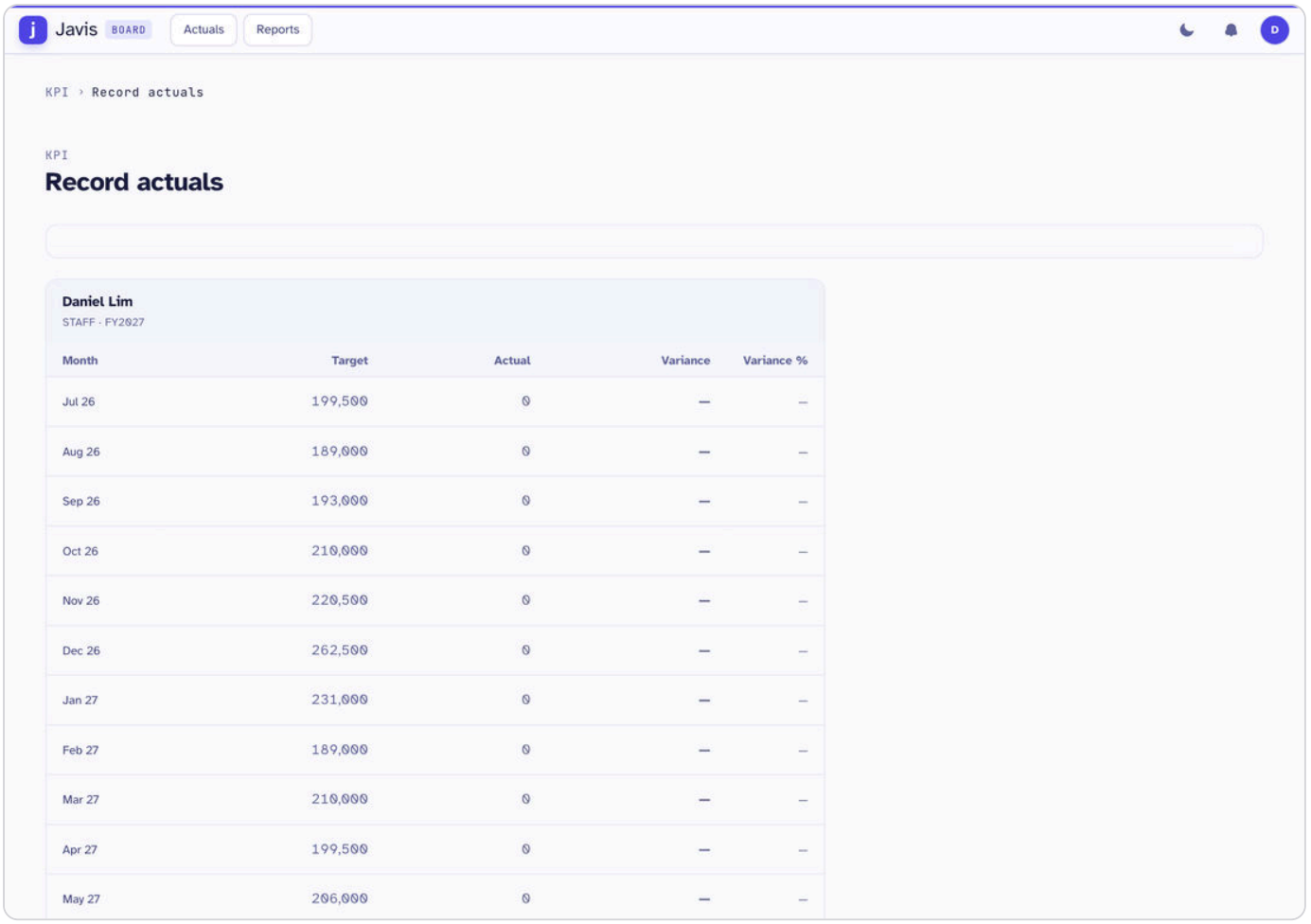
KPI BOARD

Record your sales

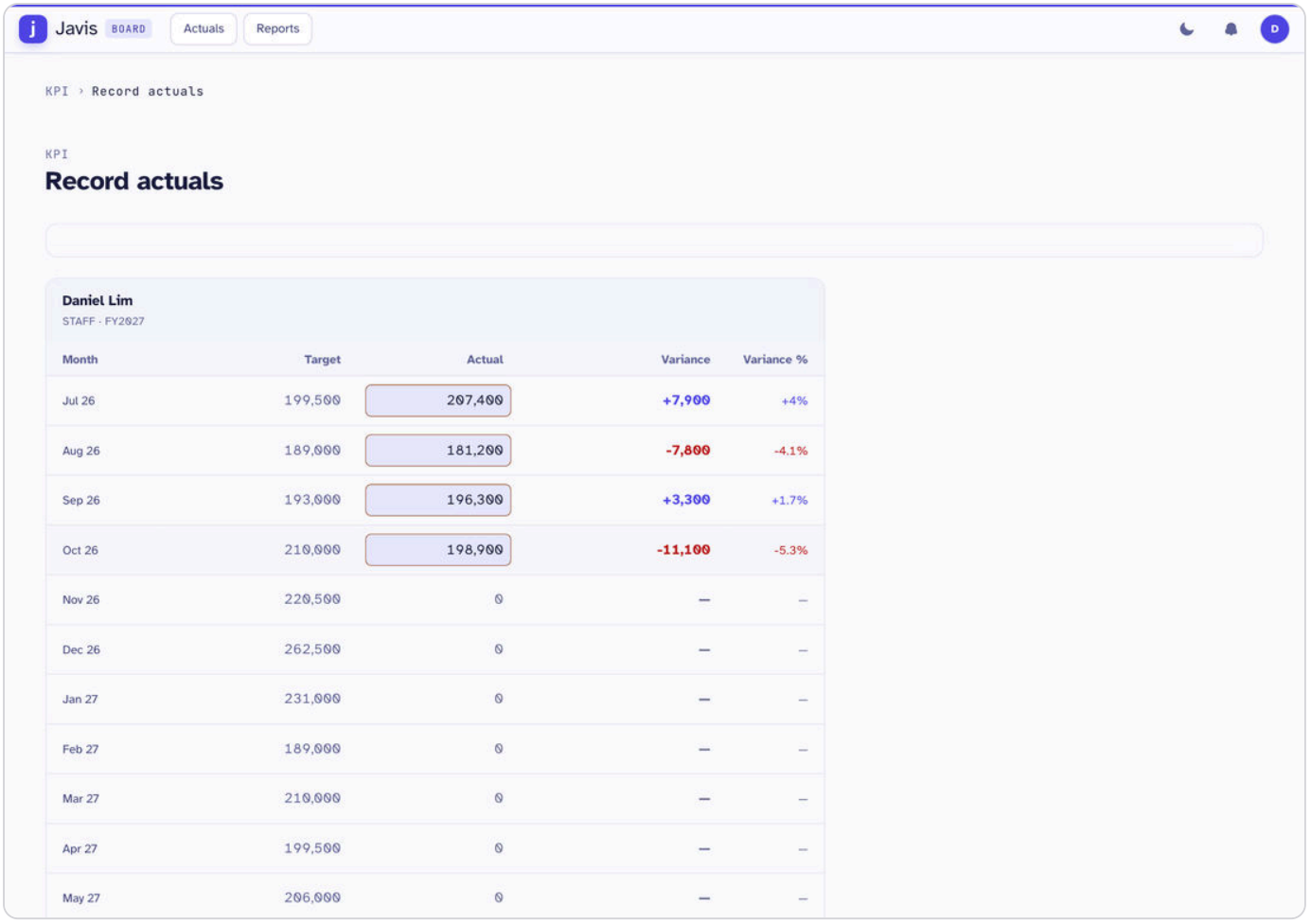
For: Staff

If your outlet manager has shared the outlet target with you, you record your own sales each month.

1. Press **Actuals** at the top of the screen. You see your target for each month of the year.



2. Click the **Actual** figure for the month, type your sales, and press **Enter**.
3. Repeat for any other month.
4. Press **Save**.



Variance shows how far above (+) or below (−) your target you are, in ringgit and as a percentage. The **Year** row adds up the whole year.

If the page says **You have no target**, your outlet manager has not shared the outlet target. Your outlet's sales are then recorded for the outlet as a whole.

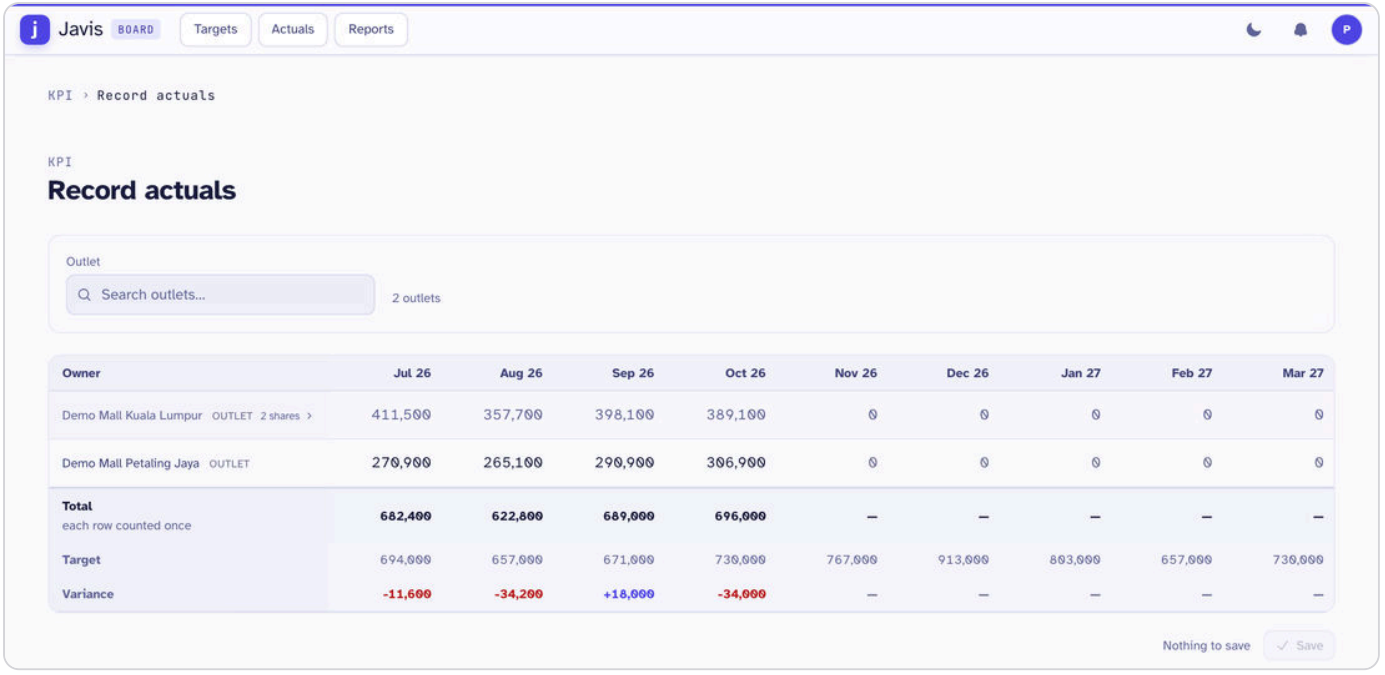
A month that has been signed off shows its figure without a box and cannot be changed.

KPI BOARD

Record your outlet's sales

For: Outlet managers

1. Press **Actuals** at the top of the screen. Each outlet you manage has a row, with the months across.
2. Click a month on your outlet's row, type the sales, and press **Enter**.
3. Press **Save**.



The bottom rows show the **Total** of your outlets, the **Target** and the **Variance**.

An outlet whose target is shared with staff shows how many shares it has, for example **2 shares**. Its figures are the total of what those people record, so you cannot type them on this row.

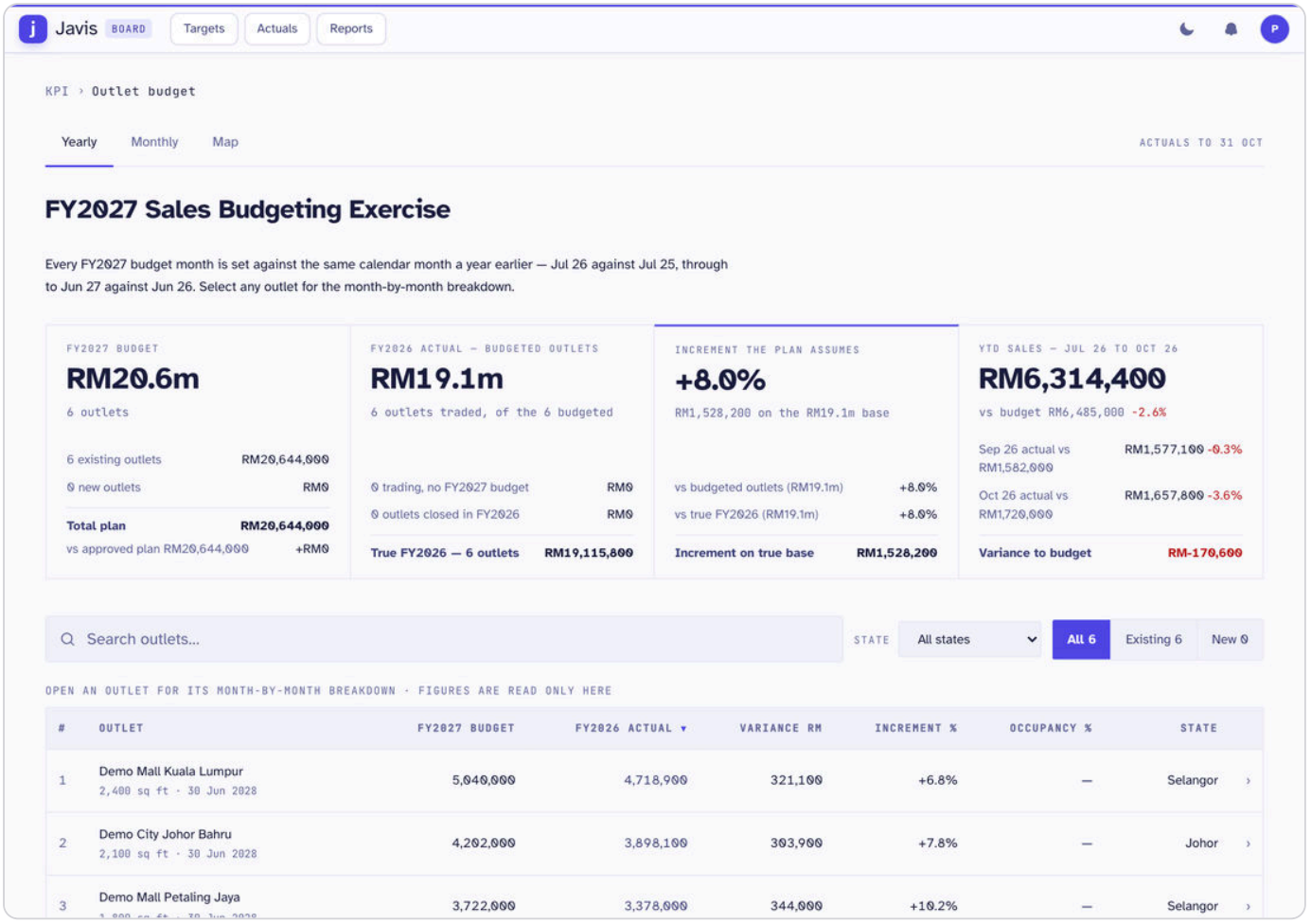
Head office can also load every outlet's sales at once from a file. See Load the monthly sales.

KPI BOARD

Read the sales report

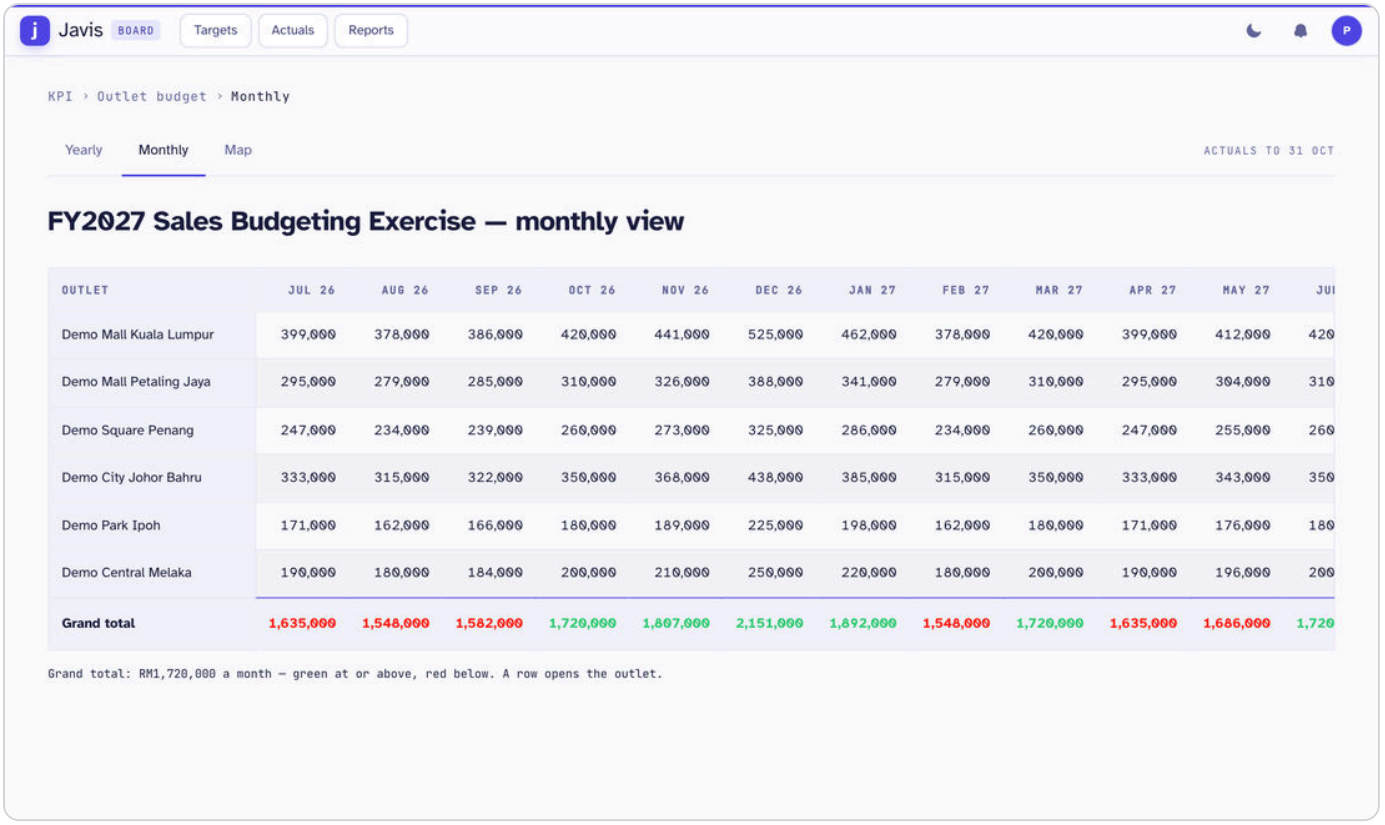
For: Managers

1. Press **Reports** at the top of the screen, or open **Reports** in the menu on the left.
2. The **Yearly** tab shows:
    - **FY2027 budget**: the total target for the year (FY means financial year).
    - **FY2026 actual**: last year's sales for the same outlets.
    - **Increment the plan assumes**: how much higher this year's target is than last year's sales.
    - **YTD sales** (year to date): sales so far against the target so far.
3. Below that, one row per outlet. Use **Search outlets...**, **State**, or **All**, **Existing** and **New** to narrow the list. Press an outlet to see its months.



Actuals to at the top right is the last day the sales figures cover.

The **Monthly** tab shows every outlet's target month by month, with a total for each month. The **Map** tab shows the totals by state.



You only see the outlets your staff record covers. Head office sees all of them. If **Reports** is missing, ask an administrator to give you access to it.

Load the monthly sales

For: Head office

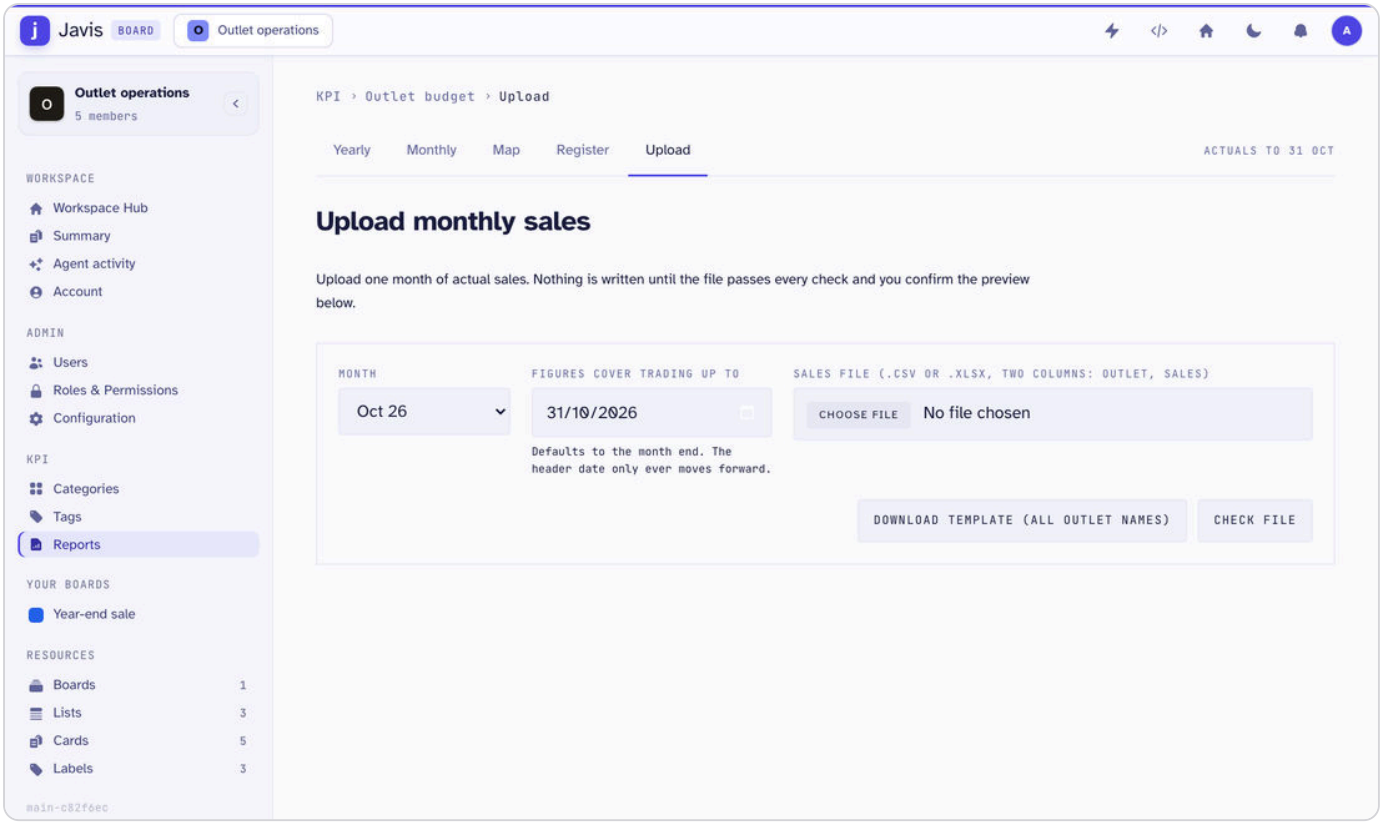
Each month, head office loads every outlet's sales from one file. Nothing is saved until the file passes every check and you confirm.

Prepare the file

- A **.csv** or **.xlsx** file, up to 5 MB.
- Two columns: the outlet name, then the sales amount. A heading row is fine.
- Amounts may include commas, spaces or **RM**.
- Press **Download template (all outlet names)** to get a file with every outlet name spelled the way the app expects. Starting from it avoids most mistakes.

Load it

1. Open **Reports** in the menu on the left, then the **Upload** tab.
2. Under **Month**, pick the month the sales belong to.
3. Under **Figures cover trading up to**, set the last day the figures cover. It starts at the month end.
4. Choose the file and press **Check file**. You see what would change, and any problems.
5. If there are no problems, press **Confirm — load into database**.



What stops a file

- An outlet name that does not match any outlet. Upper and lower case and extra spaces do not matter.
- The same outlet twice.
- An amount that is not a number or is below zero.
- An empty file.

An outlet missing from the file is only a warning. Its current figure stays as it is, so you can load part of the outlets.

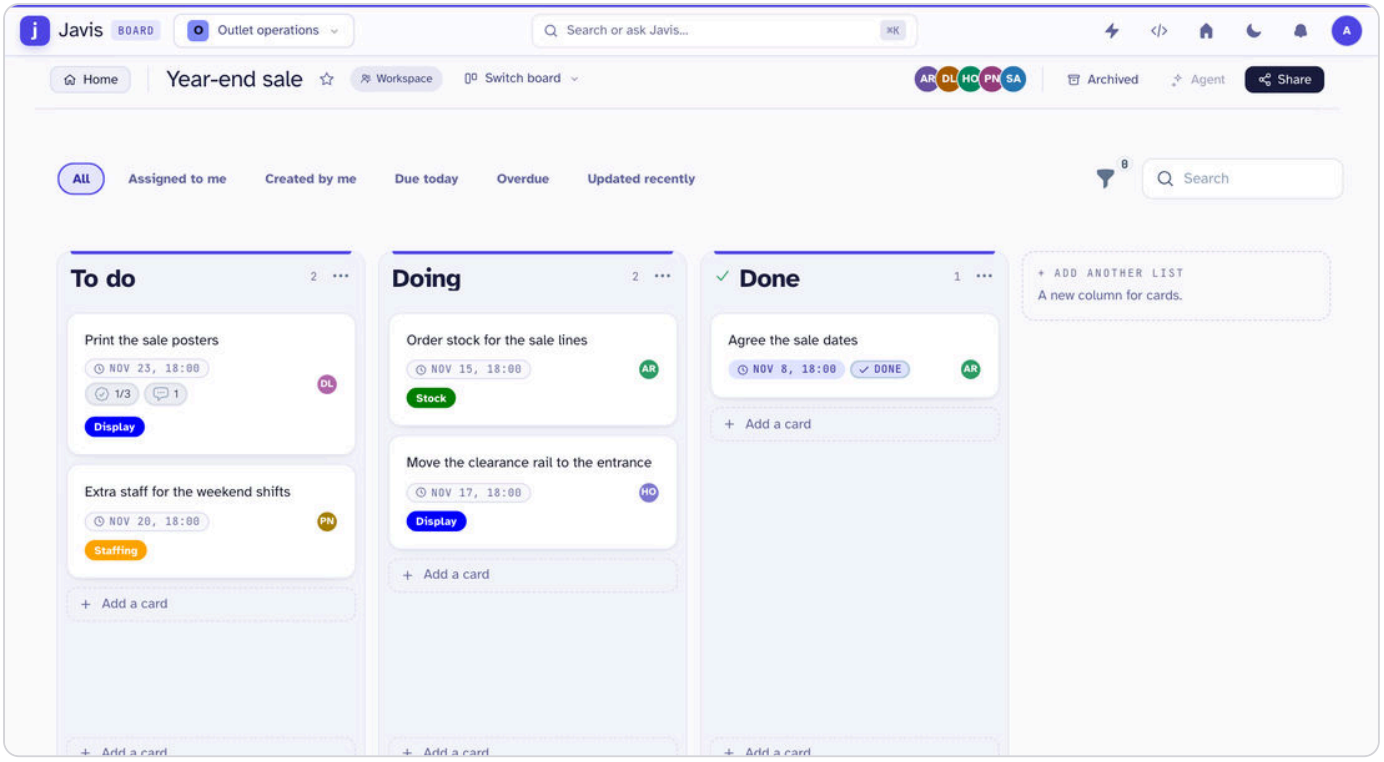
If the month is part-way through, the report shows an estimate for the full month until the month is complete.

KPI BOARD

Work on a task board

For: Everyone

1. Open the board under **Your boards** in the menu on the left, or press it on the workspace home page.
2. Each list is a column, for example **To do**, **Doing** and **Done**. Each card is one task. A card shows its due date, its checklist progress, the people on it and its labels.



Add and move cards

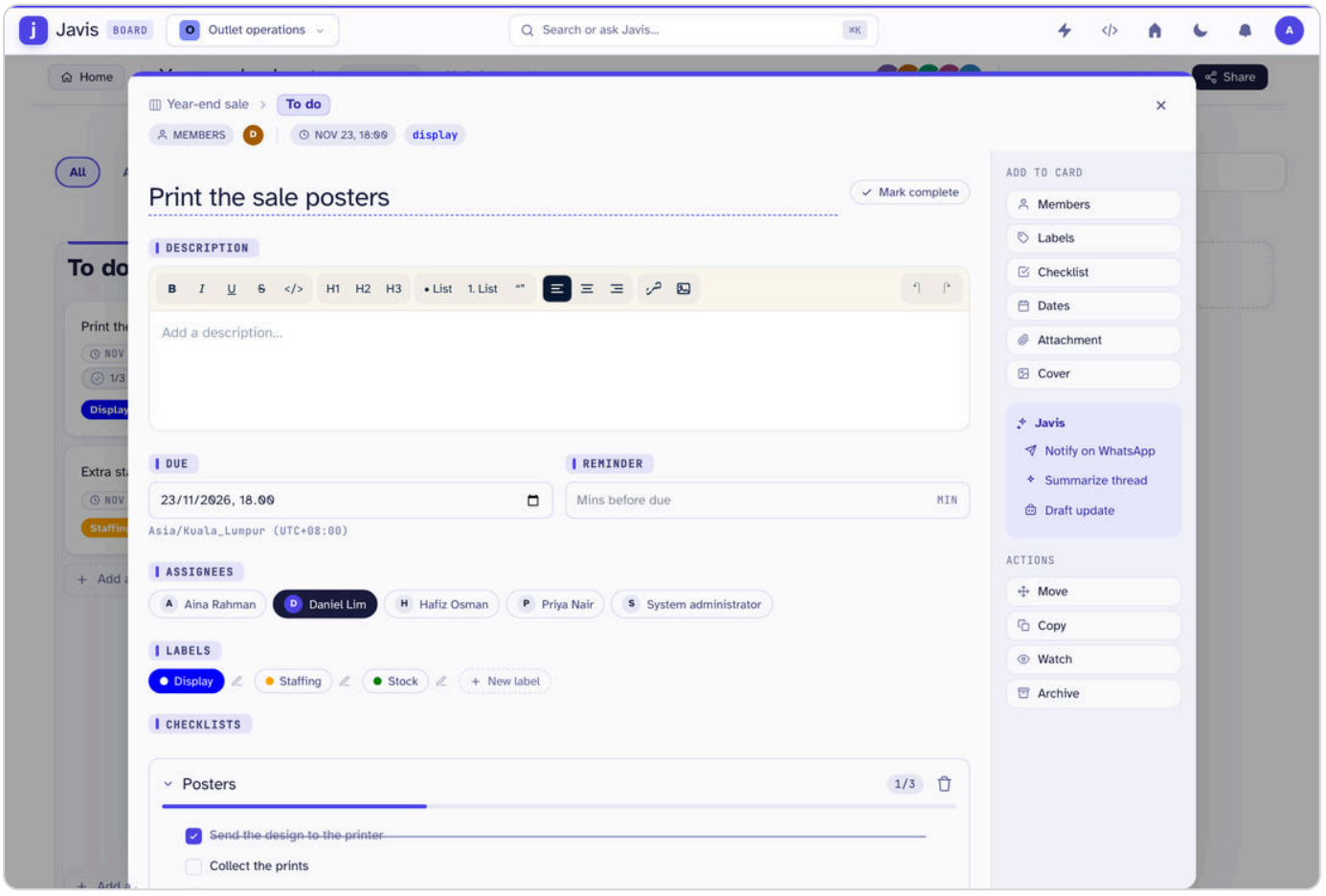
- Press **Add a card** under a list. A new card opens. Type the task as its title.
- Drag a card to another list to move it, for example from **Doing** to **Done**.
- Use **All**, **Assigned to me**, **Due today** or **Overdue** at the top to show only some cards.

Work on a card

Press a card to open it.

- Write the details under **Description**.
- Set **Due** and a **Reminder** in minutes before it is due.
- Under **Assignees**, press the people who are doing it.

- Under **Labels**, press a label to add it, or **New label** to make one.
- Tick checklist items as they are done.
- Press **Mark complete** when the task is finished.



On the right, **Add to card** adds members, labels, a checklist, dates, a file or a cover. **Actions** lets you **Move**, **Copy**, **Watch** or **Archive** the card.

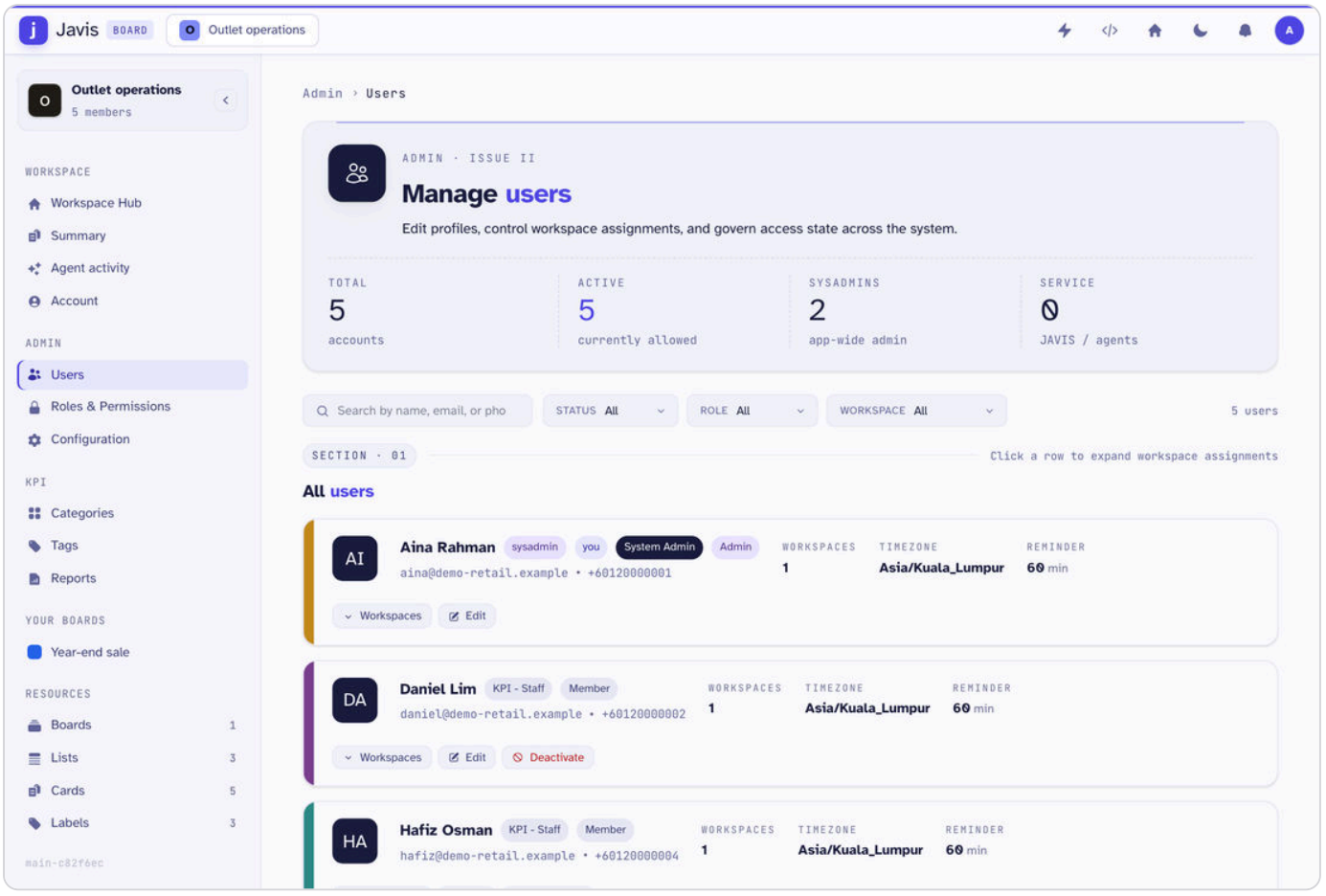
The **Javis** buttons (**Notify on WhatsApp**, **Summarize thread**, **Draft update**) only work if your company has connected the Javis WhatsApp assistant.

Give people access

For: Administrators

See and change a person

1. Open **Users** in the menu on the left. Each person shows their roles, email, phone number and how many workspaces they are in.
2. Use **Status**, **Role** and **Workspace** to narrow the list.
3. Press **Edit** to change the person's name, email, time zone or **System roles**, then press **Submit**. Press **Workspaces** to choose which workspaces they are in.
4. Press **Deactivate** to stop someone signing in. Their history is kept.



Change what a role can do

Open **Roles & Permissions** in the menu. The top part lists the task board roles (**Owner**, **Admin**, **Member**, **Guest**, **Agent**). The **KPI roles** part lists **System Admin**, **KPI - Manager** and **KPI - Staff**. Press **Edit** on a role to tick what it may do, or **Create Role** to add one.

Things a role does not decide

- Which outlets a person sees comes from your company's staff records: the outlets they manage, or the outlet they work in. A role only decides what they may do with them.
- Seeing **Reports** is a separate permission. An administrator adds it to a role on purpose, because the report shows every outlet a person covers side by side.

USER GUIDE · VERSION 1

Staff incentive

Pay outlet staff commission on what they sell. Staff see every ringgit they earned on their phone and withdraw it to their own bank account; head office sets the rules, prizes and payouts.

1. What it is for
2. Your first time in the staff app
3. Check your balance
4. Read your statement
5. Register your bank account
6. Withdraw your money
7. Track a payment
8. See your ranking and prizes
9. Your account, alerts and language
10. The head office dashboard
11. Import sales
12. Look up who sold what
13. Assign sales that have no name
14. Answer a staff query
15. Pay out commission
16. Set commission rules
17. Run awards
18. Approve a change
19. Get reports

20. Check staff, outlets and products
21. Settings, users and roles

What it is for

For: Everyone

Staff incentive works out the commission each outlet staff member earns on their sales, keeps it in their own balance, and pays it to their bank account when they ask. Every figure can be traced back to the sale and the rule that paid it, so a staff member can explain their own balance to their manager from the statement alone.

It has two sides:

- **The staff app**, opened on a phone. Staff see their balance, statement, ranking and prizes, and withdraw their money.
- **The admin panel**, opened on a computer. Head office imports sales, sets the commission rules and prizes, checks unusual sales, pays out and runs reports.

How money moves

1. A sale is imported. Each line is matched to the staff member who made it.
2. The commission rules decide what each line earns. The amount shows as **Pending**.
3. After a few days (in case the customer returns the item), it becomes **Available**.
4. The staff member withdraws it. While the payment is on its way it is **On hold**; then it is paid into their bank account.

Who does what

These are the roles as **Roles** in the admin panel names them:

Role	What they do
Staff	Uses the staff app only
Outlet Manager	Answers staff queries about their own outlet's sales
Finance	Pays out commission, reviews unusual sales, runs reports
Hq Commercial	Writes commission rules, campaigns and prizes
Hr Administrator	Looks after staff records and accounts
Auditor	Looks at records without changing them

Anything that changes how money is worked out needs a second person to approve it. Nobody can approve their own change.

What it needs from other modules

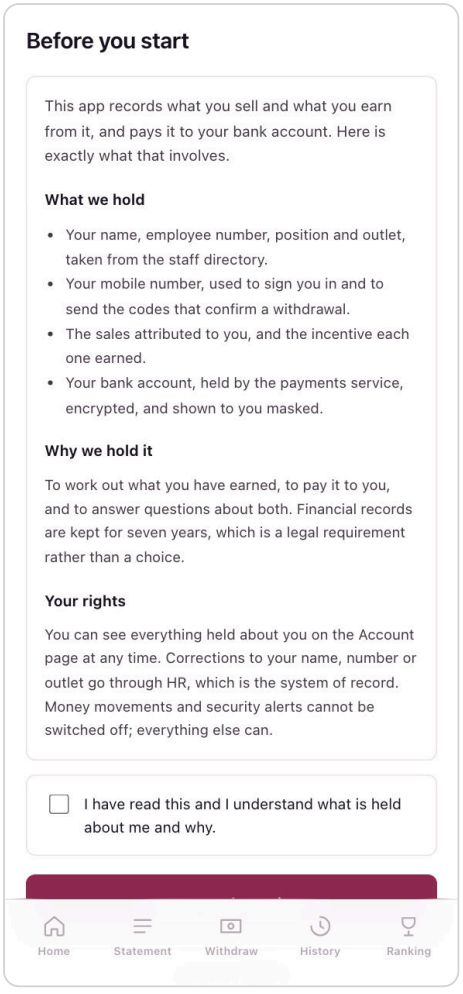
Staff, outlets and products come from your company's staff directory and product list; they are not typed in here. Sales come from your point-of-sale reports. The balances themselves are kept by the separate e-wallet module.

STAFF INCENTIVE

Your first time in the staff app

For: Staff

1. Open the staff app on your phone and sign in with your company account.
2. The first screen is **Before you start**: what the app holds about you, why, and for how long. Read it.
3. Tick **I have read this and I understand what is held about me and why**, then press **Agree and continue**.



If you press **I do not agree**, you are signed out. You can still be paid: speak to HR, who will arrange it outside the app. If the wording of the notice changes, everyone is asked again.

Put it on your home screen

In your phone's browser menu, choose **Add to Home Screen**. The app then opens like any other app.

The menu at the bottom has **Home**, **Statement**, **Withdraw**, **History** and **Ranking**, plus **Awards** while a prize is running for you. Press the circle with your initials on **Home** to open your **Account**.

STAFF INCENTIVE

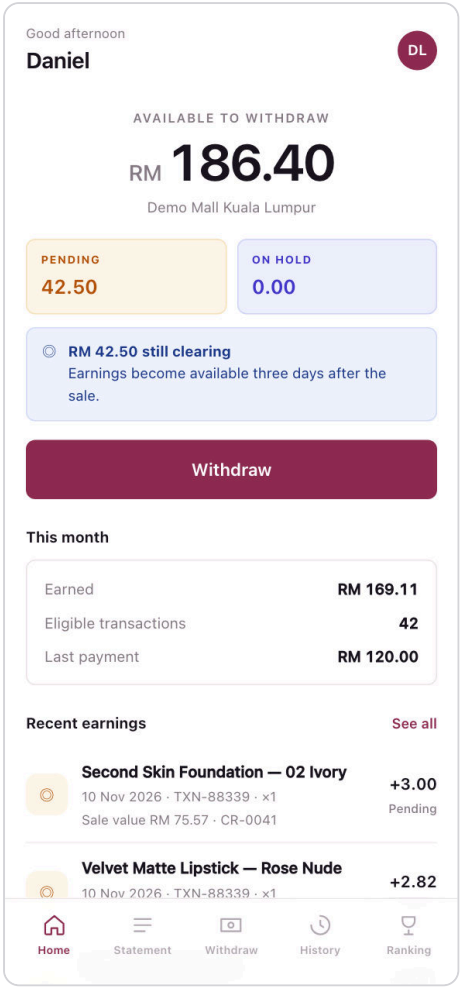
Check your balance

For: Staff

Home shows **Available to withdraw** in large figures: money you can take out today. Beside it:

- **Pending**: money still clearing. It becomes available a few days after the sale, once the customer can no longer return the item.
- **On hold**: withdrawals you asked for that are still on their way to your bank.

Below that, **This month** shows what you **Earned**, your **Eligible transactions** and your **Last payment**. **Recent earnings** lists your latest commission lines; press **See all** for the full statement.



STAFF INCENTIVE

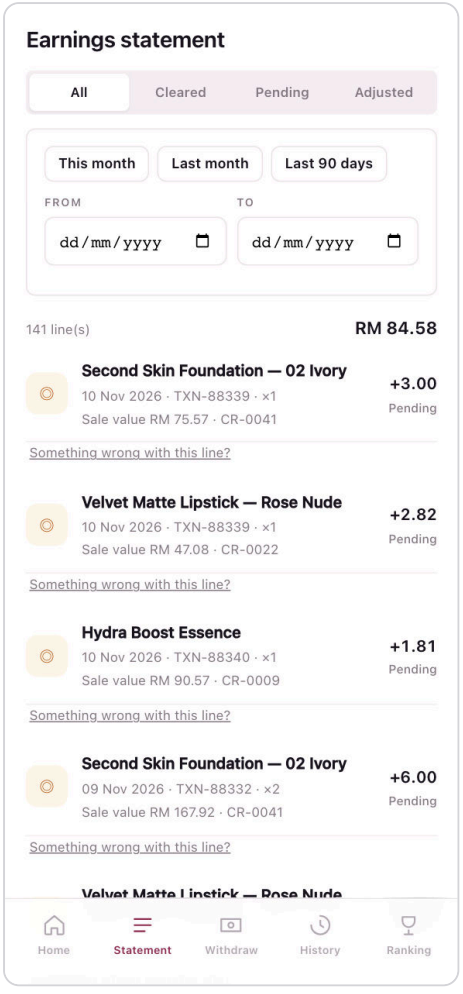
Read your statement

For: Staff

Statement lists every commission line you earned. Each line shows the product, the date, the sale reference, how many you sold, the sale value, the code of the rule that paid it, and the amount.

- Press **Cleared**, **Pending** or **Adjusted** to see only those lines, or **All** for everything.
- Press **This month**, **Last month** or **Last 90 days**, or pick your own **From** and **To** dates.

A line that was reversed or did not qualify stays on the list, so your statement always adds up to your balance.

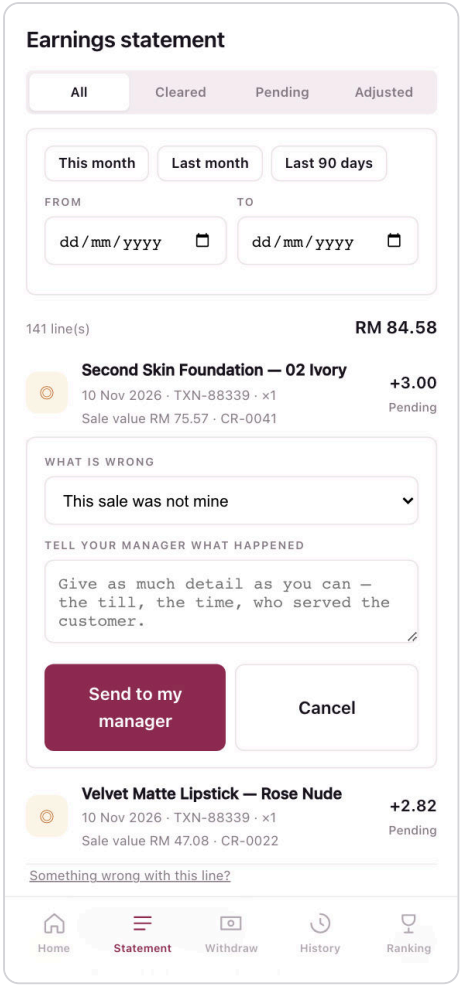


Something looks wrong

1. Under the line, press **Something wrong with this line?**

2. In **What is wrong**, pick **This sale was not mine**, **A sale of mine is missing** or **The amount looks wrong**.
3. Under **Tell your manager what happened**, give the till, the time and who served the customer.
4. Press **Send to my manager**.

Your outlet manager looks into it and you are told the outcome. Do it soon: a sale that came in without a name can only be given to someone for a limited time.



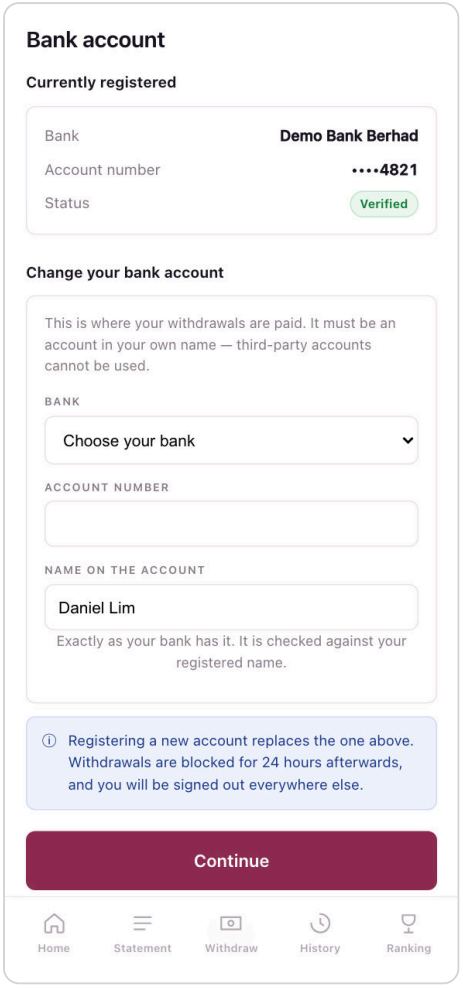
STAFF INCENTIVE

Register your bank account

For: Staff

You need a bank account in your own name before you can withdraw. Accounts in someone else's name cannot be used; this is a legal rule.

1. Press the circle with your initials on **Home** to open **Account**, then press the button under **Bank account**.
2. **Choose your bank** from the list.
3. Type the **Account number**: digits only, no spaces or dashes.
4. Type the **Name on the account** exactly as your bank has it. It is checked against your registered name.
5. Press **Continue** and confirm with the code sent to your phone.



The account is checked with a RM 1 transfer and a name check. Until that passes, it shows **Awaiting verification** and you cannot withdraw to it.

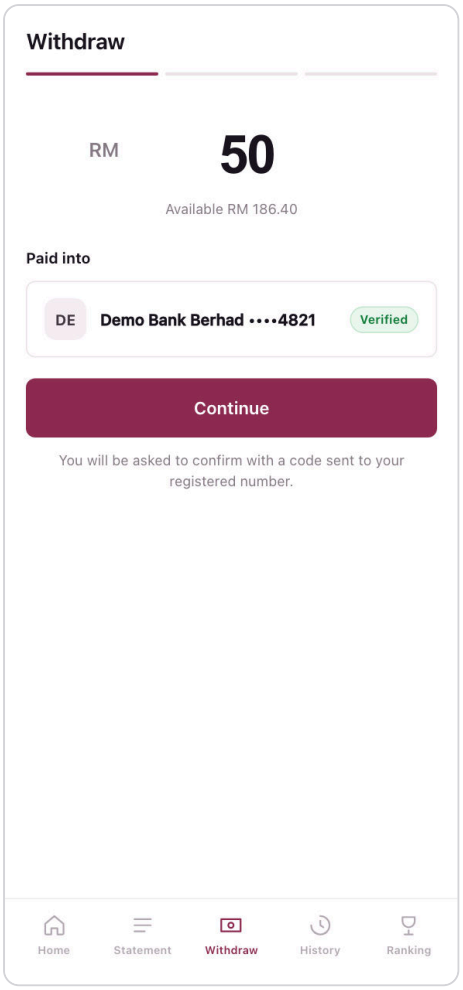
Registering a new account replaces the old one. Withdrawals are then blocked for 24 hours, and you are signed out on your other devices. This protects your money if someone changes your account without your knowledge.

STAFF INCENTIVE

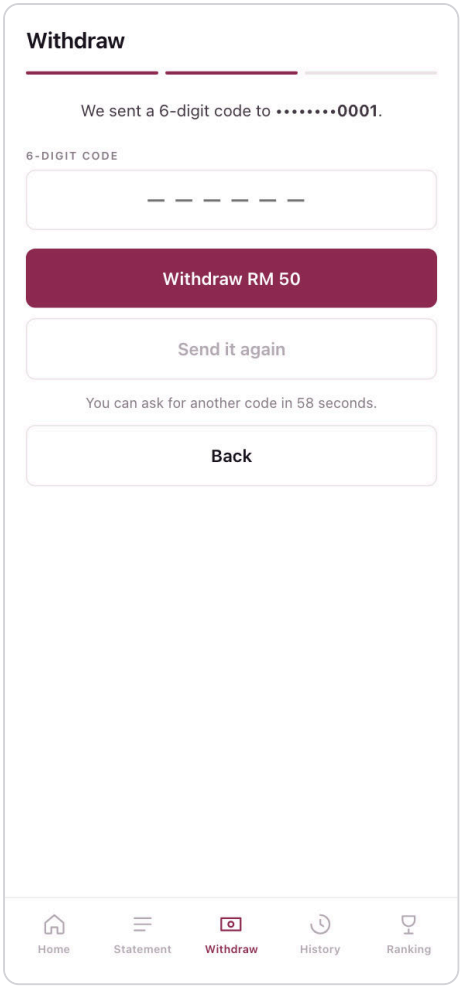
Withdraw your money

For: Staff

1. Press **Withdraw** in the menu.
2. Type the amount, up to your available balance.
3. Check the bank account under **Paid into**.
4. Press **Continue**.



5. A 6-digit code is sent to your registered phone number. Type it in.
6. Press the button that confirms the amount, for example **Withdraw RM 50**.



The code expires after a few minutes. If it does not arrive, wait for the countdown, then press **Send it again**. If you type it wrongly, the screen tells you how many tries are left.

Every withdrawal asks for a code. There is no setting that turns this off. Large withdrawals may be checked by Finance before they are paid.

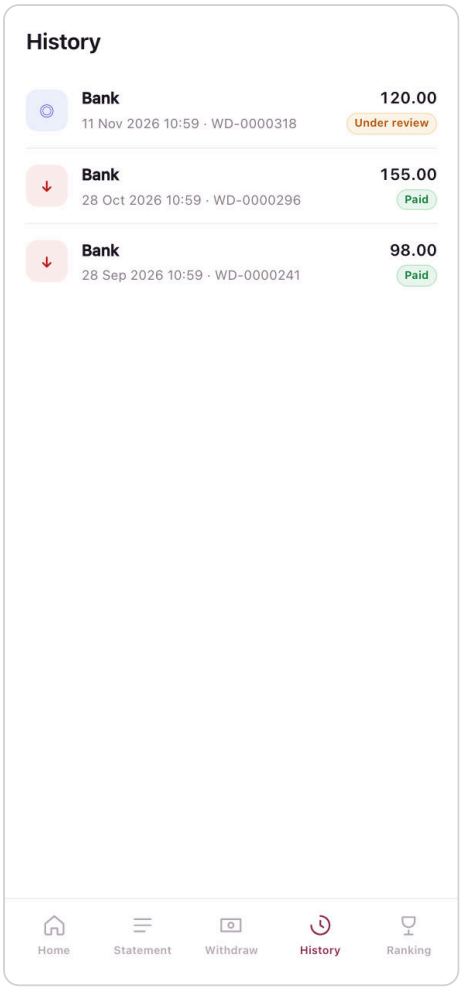
STAFF INCENTIVE

Track a payment

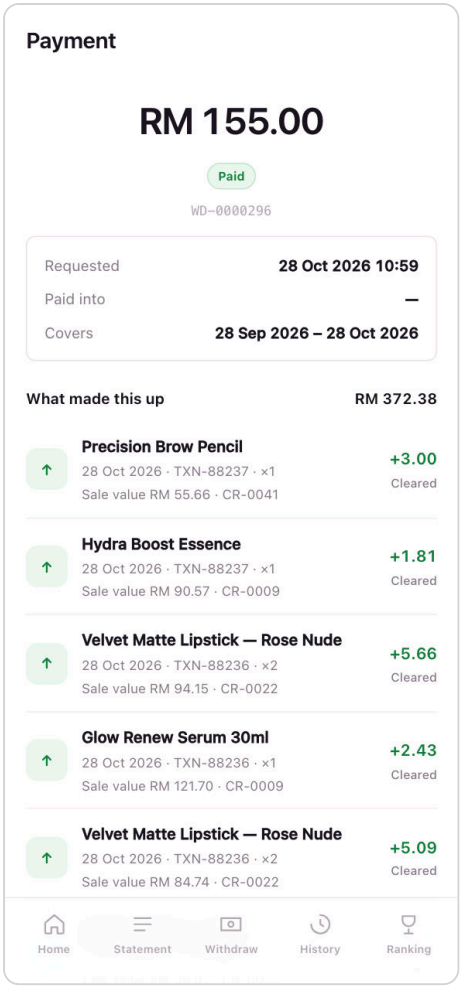
For: Staff

History lists every withdrawal, newest first, with its reference number and status:

- **Under review**: being checked before it is sent.
- **Released**: on its way to your bank.
- **Paid**: in your bank account.



Press a withdrawal to see when you asked for it, where it was paid, the dates it covers, and every commission line earned in that time under **What made this up**. Open this screen when someone asks you to explain a figure.


Payment
RM 155.00
Paid
WD-0000296
Requested
28 Oct 2026 10:59
Paid into
—
Covers
28 Sep 2026 – 28 Oct 2026
What made this up
RM 372.38
Precision Brow Pencil
28 Oct 2026 · TXN-88237 · ×1
Sale value RM 55.66 · CR-0041
+3.00
Cleared
Hydra Boost Essence
28 Oct 2026 · TXN-88237 · ×1
Sale value RM 90.57 · CR-0009
+1.81
Cleared
Velvet Matte Lipstick — Rose Nude
28 Oct 2026 · TXN-88236 · ×2
Sale value RM 94.15 · CR-0022
+5.66
Cleared
Glow Renew Serum 30ml
28 Oct 2026 · TXN-88236 · ×1
Sale value RM 121.70 · CR-0009
+2.43
Cleared
Velvet Matte Lipstick — Rose Nude
28 Oct 2026 · TXN-88236 · ×2
Sale value RM 84.74 · CR-0022
+5.09
Cleared
Home
Statement
Withdraw
History
Ranking

STAFF INCENTIVE

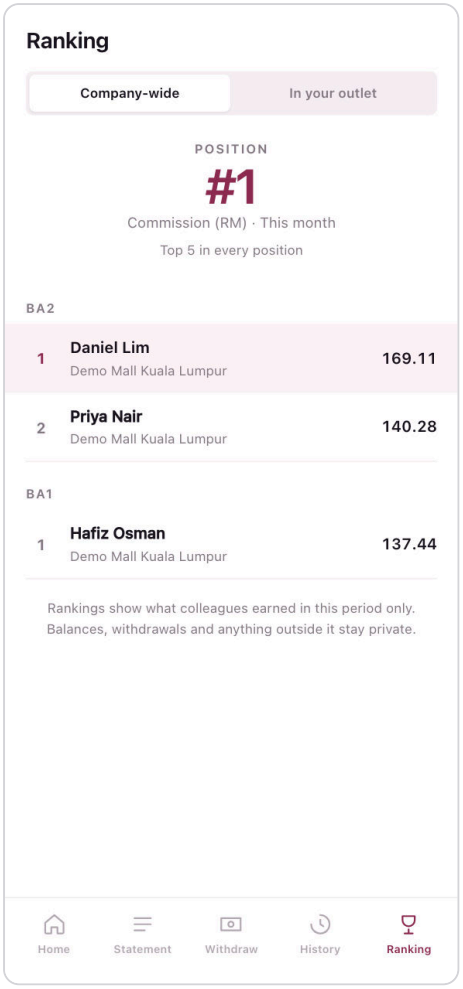
See your ranking and prizes

For: Staff

Ranking

Ranking shows where you stand this period. Switch between **Company-wide** and **In your outlet**. People are ranked against others in the same position, and the top five of each position are listed. Your own row is marked.

The heading says what is ranked (for example commission earned) and for which period. Only that figure is shared. Balances and withdrawals stay private.



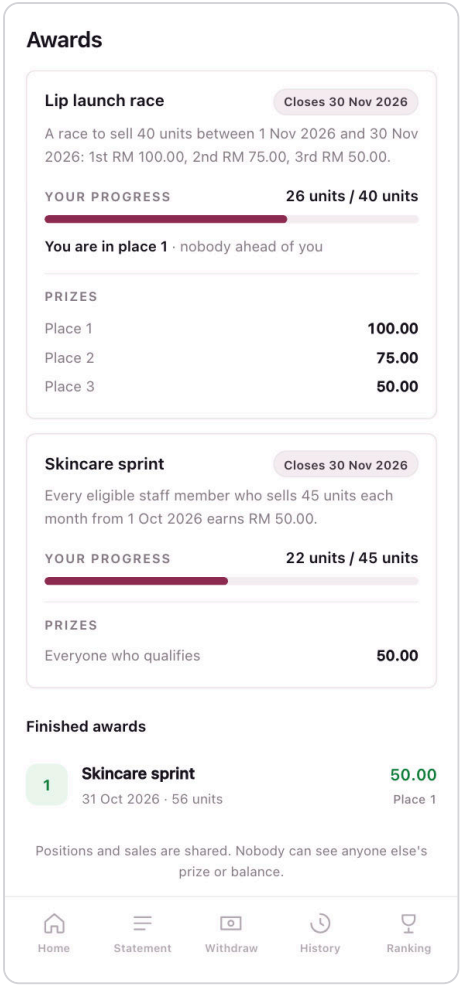
Awards

An award is a prize for a whole period, paid on top of your commission, for example "sell 45 skincare units this month" or "first three to 40 lip units win". When an award is running for you, an **Awards** tab appears in the menu at the bottom. It shows:

- what each running award asks for, when it closes, and the prize for each place;

- **Your progress**: how far you are, and for a race or ranking, your place and the gap to the person above;
- **Finished awards**: what you won. The prize lands in your balance like commission.

Your place can move on a day you sold nothing, because head office imports sales in batches. The result is final only when the award closes and is settled.



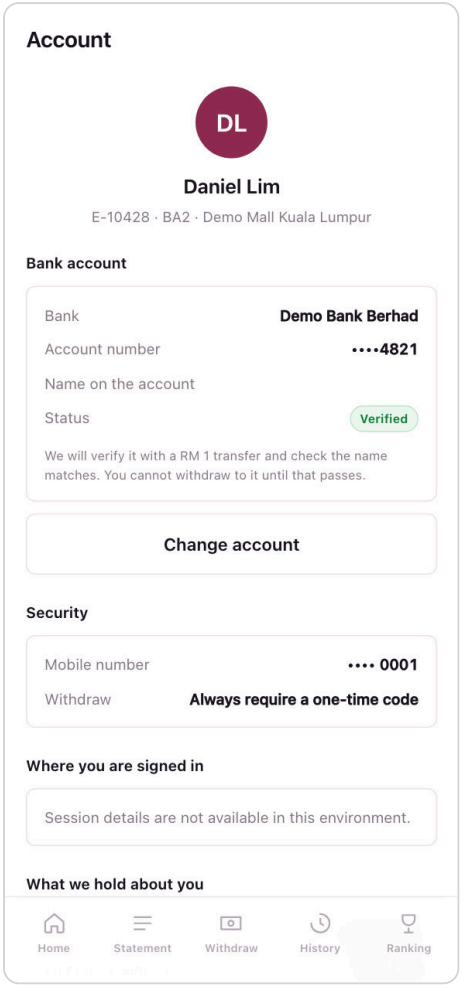
STAFF INCENTIVE

Your account, alerts and language

For: Staff

Account keeps your details in one place:

- **Bank account**: where withdrawals are paid, shown with only the last digits, and **Change account**.
- **Security**: your registered mobile number. Withdrawals always need a one-time code.
- **Where you are signed in**: sign out of a phone you do not recognise.
- **What we hold about you**: every piece of personal information the app stores. To correct your name, number or outlet, speak to HR.
- **Language**: **English**, **Bahasa Malaysia** or **中文**.



Alerts

The app has a **Notifications** page that lists every message it sent you, whatever your settings. Under **Preferences** you can switch off the optional ones; messages about security and money cannot be switched off. There is no button to reach this page in the app yet: ask your administrator for the link.

STAFF INCENTIVE

The head office dashboard

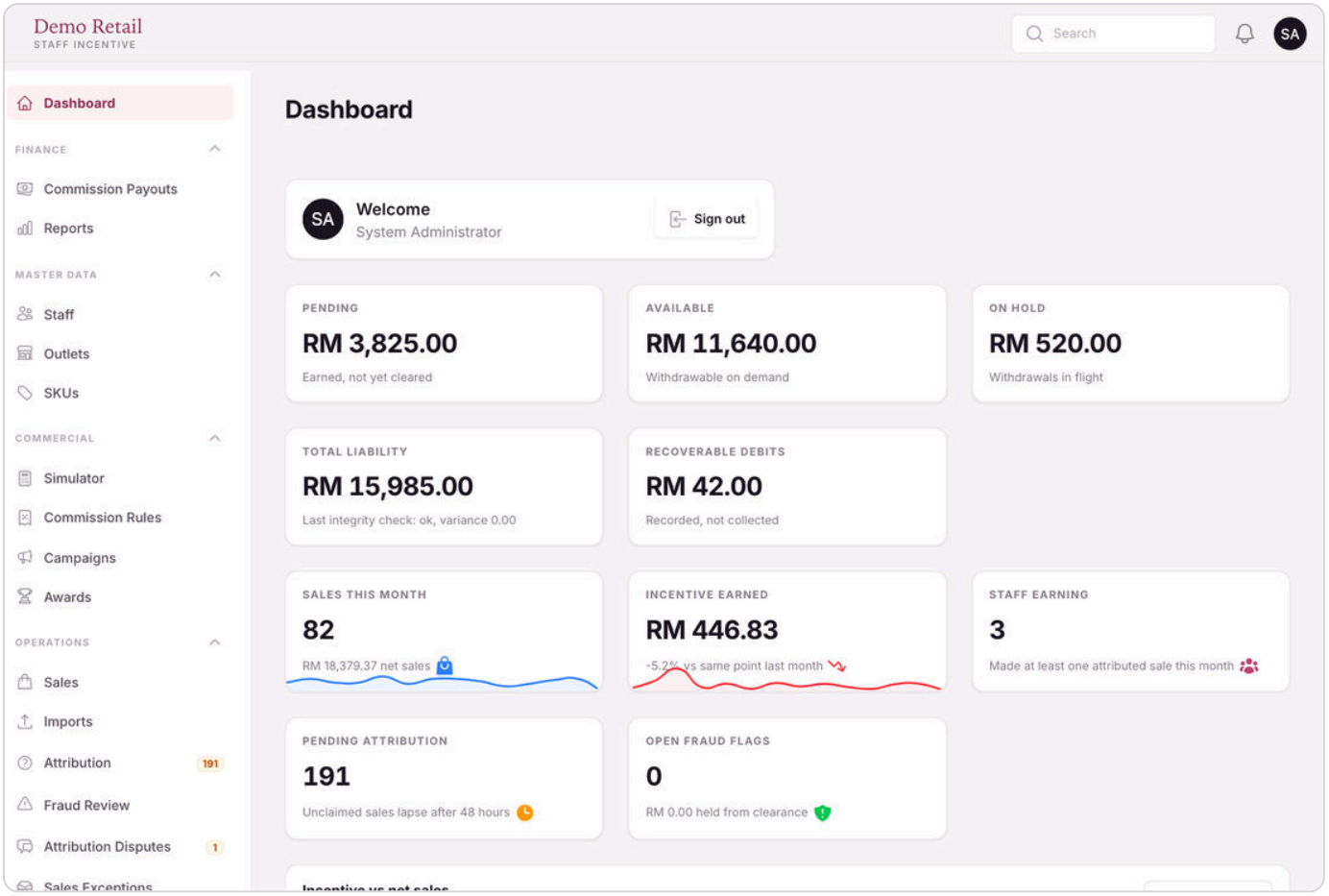
For: Head office

The admin panel opens on **Dashboard**. Your menu on the left shows only the pages your role can use.

The boxes at the top show the money position across all staff:

- **Pending**: earned but not yet cleared.
- **Available**: staff can withdraw it now.
- **On hold**: withdrawals on their way.
- **Total liability**: everything owed to staff, with the result of the last nightly check.
- **Recoverable debits**: money owed back by staff, recorded but not collected.

Below are this month's **Sales this month**, **Incentive earned** and **Staff earning**, a chart of incentive against net sales, and the top earners.



Two boxes need daily attention:

- **Pending attribution**: sales with no staff name. They lapse without commission when the time runs out. See **Assign sales that have no name**.
- **Open fraud flags**: money held back until someone reviews it.

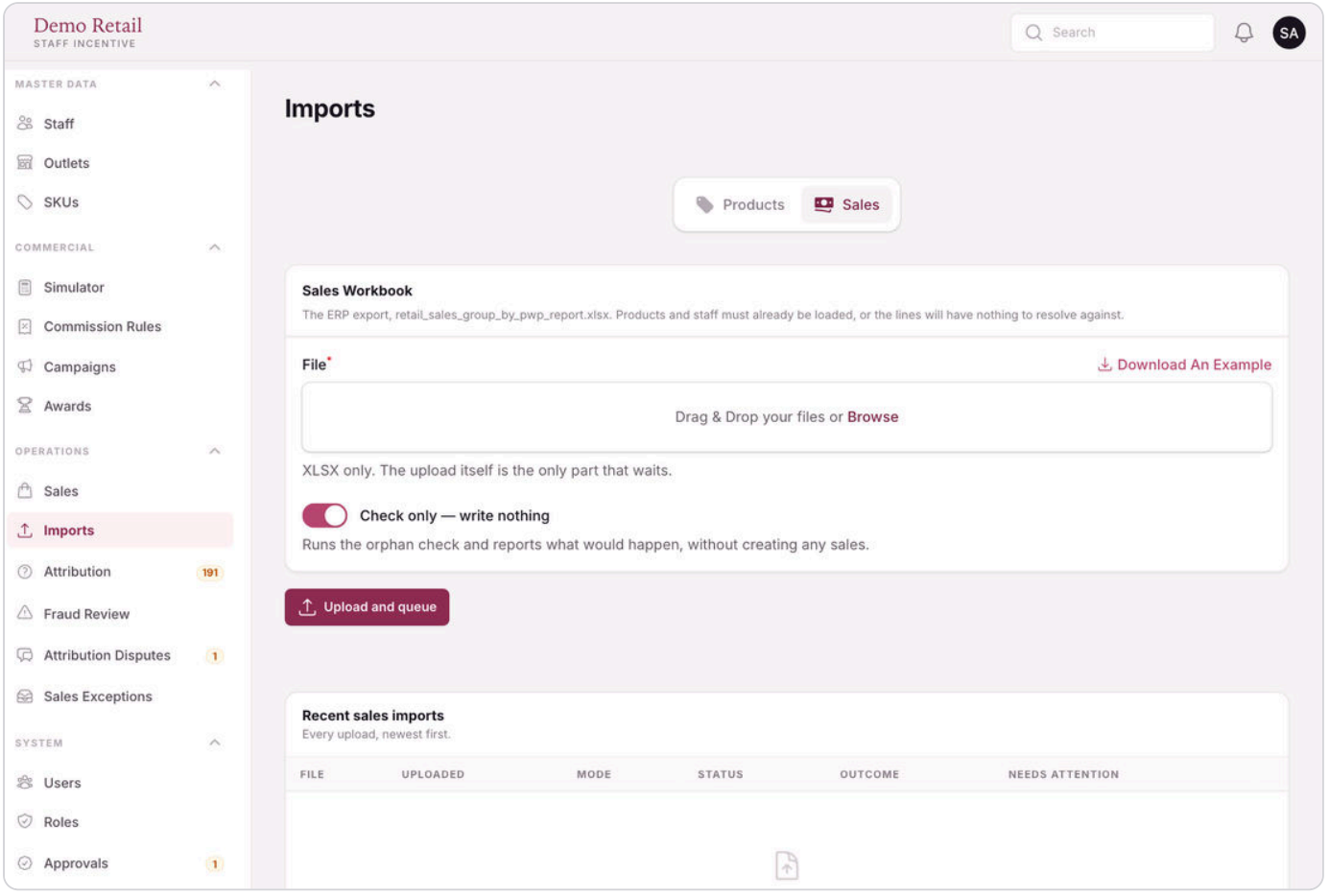
STAFF INCENTIVE

Import sales

For: Operations

Sales come in as a daily workbook exported from your point-of-sale reports. Each bill becomes one transaction. Products and staff must already exist, or the lines have nothing to match.

1. Open **Imports** and pick the **Sales** tab (or **Products** for the product list).
2. Press **Download An Example** if you need to see the exact layout the import reads.
3. Drag the XLSX file onto **File**, or press **Browse**.
4. To test a file first, keep **Check only — write nothing** switched on. It reports what would happen without creating any sales.
5. Press **Upload and queue**. The file is processed in the background.



Every upload appears under **Recent sales imports** with its outcome. Rows that could not be matched are listed with the name the file gave them, so you can fix the product or staff record and import again.

A sale that arrives late still counts towards a prize that has not been settled yet. Once a prize round is settled, late sales no longer change it.

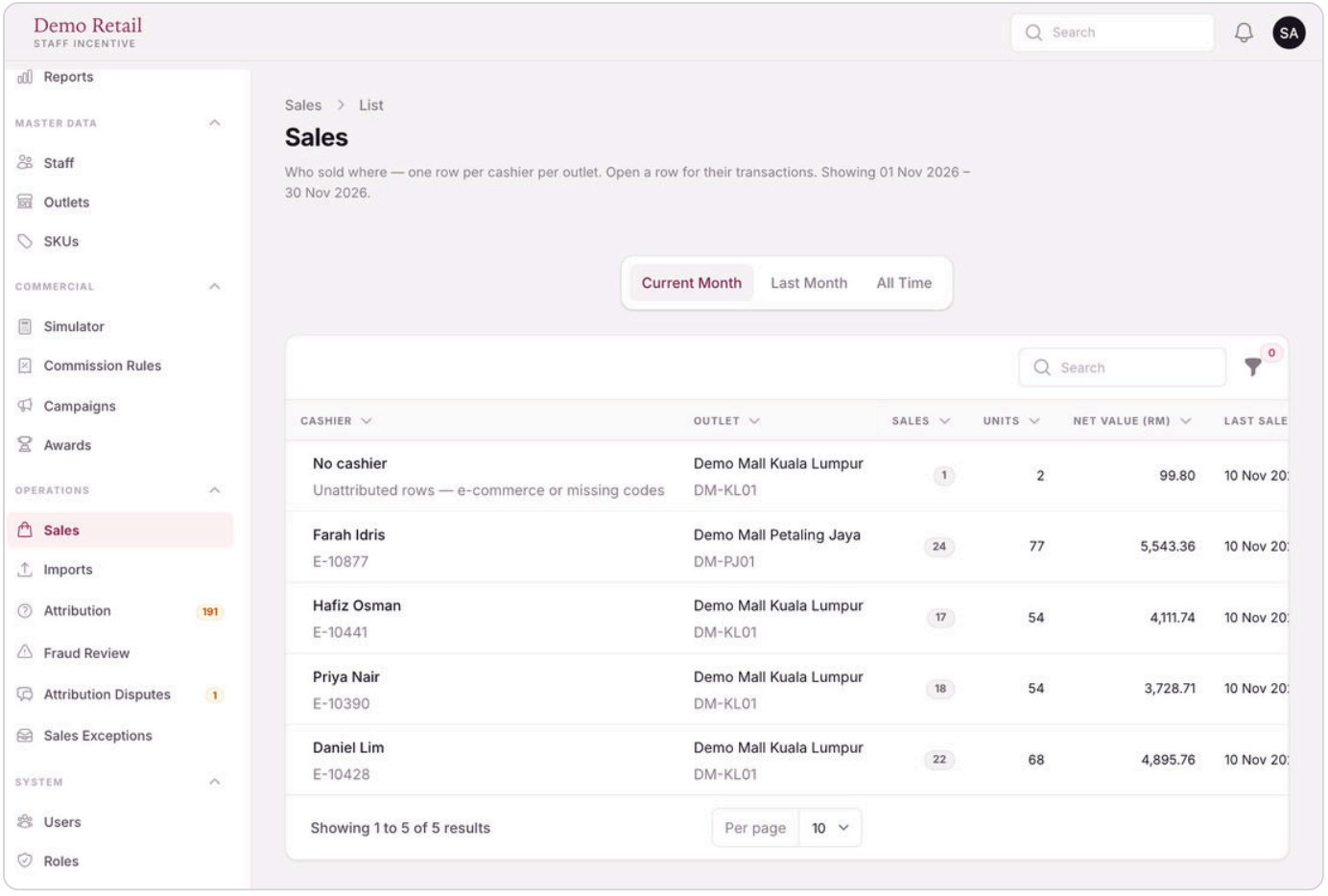
STAFF INCENTIVE

Look up who sold what

For: Operations

Sales shows one row per cashier per outlet, with their number of sales, units, net value and last sale. Sales with no staff code (for example online orders) are grouped under **No cashier**.

- Switch between **Current Month**, **Last Month** and **All Time**. The line under the heading names the exact dates shown.
- Press a row to see that person's transactions at that outlet.
- Press a transaction to see every line and its commission. **Calculation** on a line explains the figure step by step: which rule won, and the sum from the sale price to the ringgit paid.



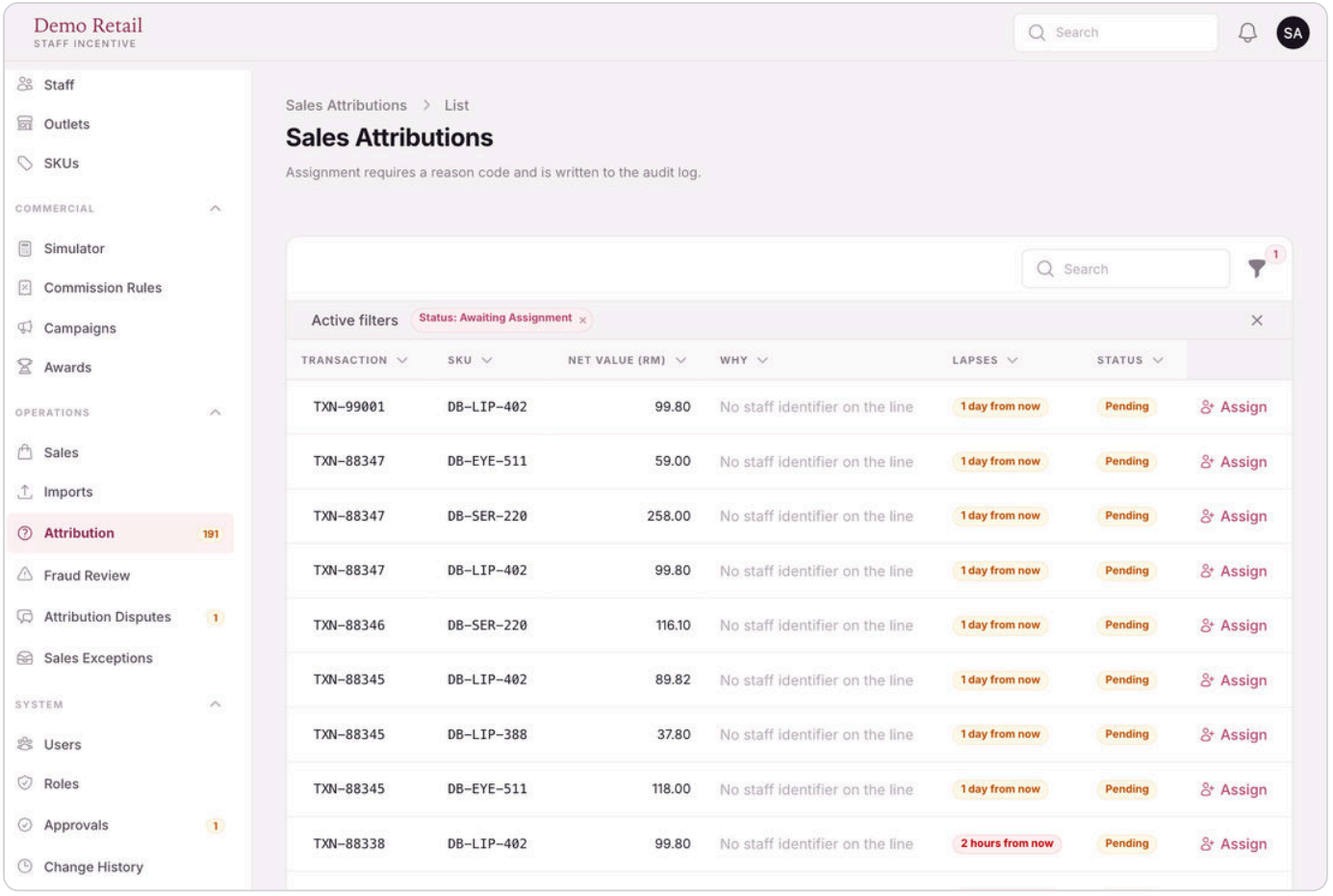
STAFF INCENTIVE

Assign sales that have no name

For: Operations

Some sale lines arrive without a staff code. They wait under **Attribution** until someone gives them to the right person. Each row says why it could not be matched and when it lapses.

1. Open **Attribution**. The number beside it in the menu is how many are waiting.
2. Press **Assign** on a line.
3. In **Attribute To**, pick the staff member.
4. Pick the **Reason Code** and save.



Every assignment is written to the change history. Assign lines before **Lapses** runs out; after that the sale earns no commission.

Answer a staff query

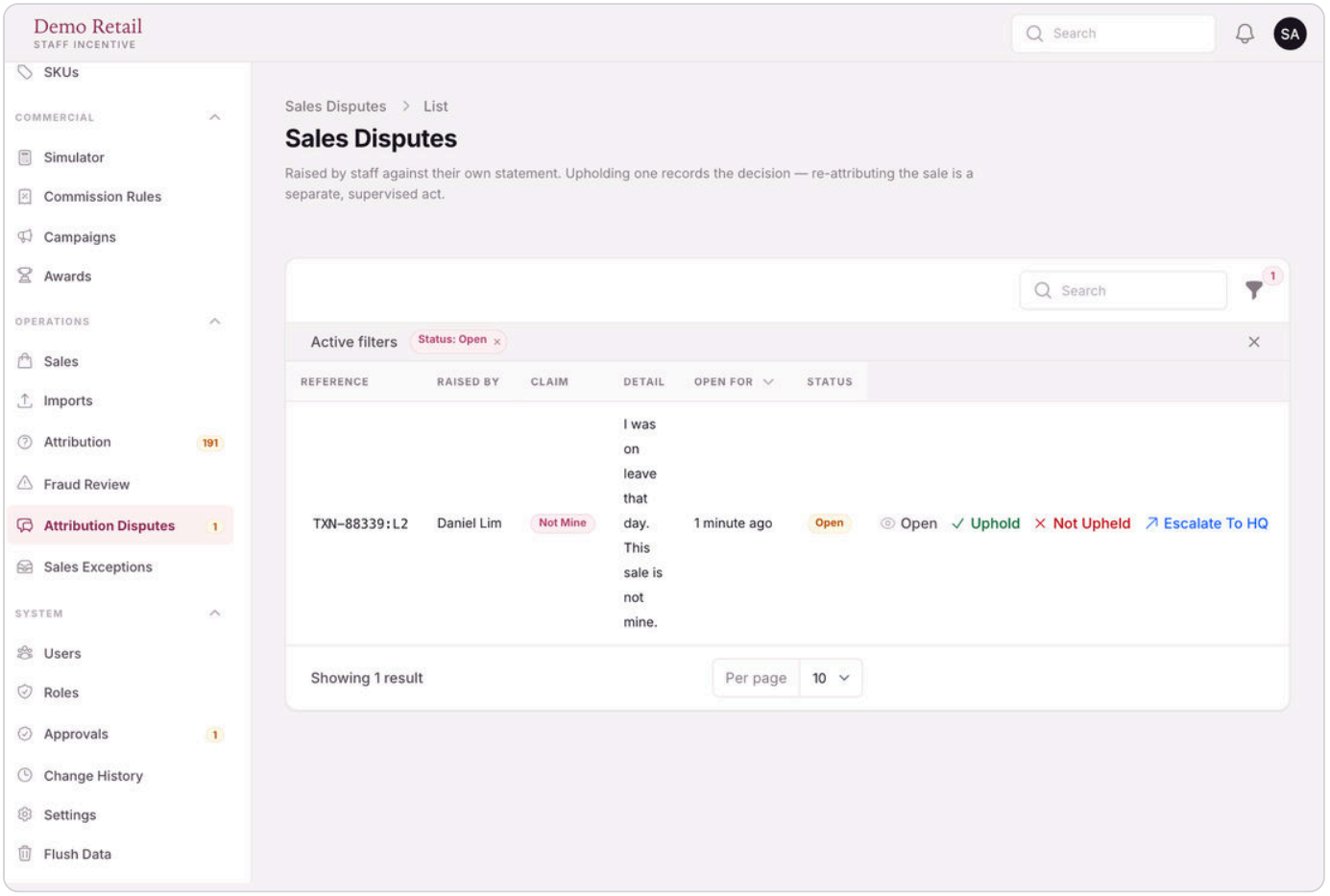
For: Outlet managers

When staff find a line on their statement that is wrong, they send it from the app. It arrives under **Attribution Disputes**. Outlet managers see only their own outlets' cases. The number in the menu counts what is still open.

Each row shows the reference, who raised it, the kind of claim, their words, and how long it has been open.

- **Uphold**: you agree. Write what you found.
- **Not Upheld**: you disagree. Give the reason.
- **Escalate To HQ**: pass it to head office without closing it.

The staff member is told the outcome either way. Upholding a query records the decision only; moving the sale to someone else is a separate step.



STAFF INCENTIVE

Pay out commission

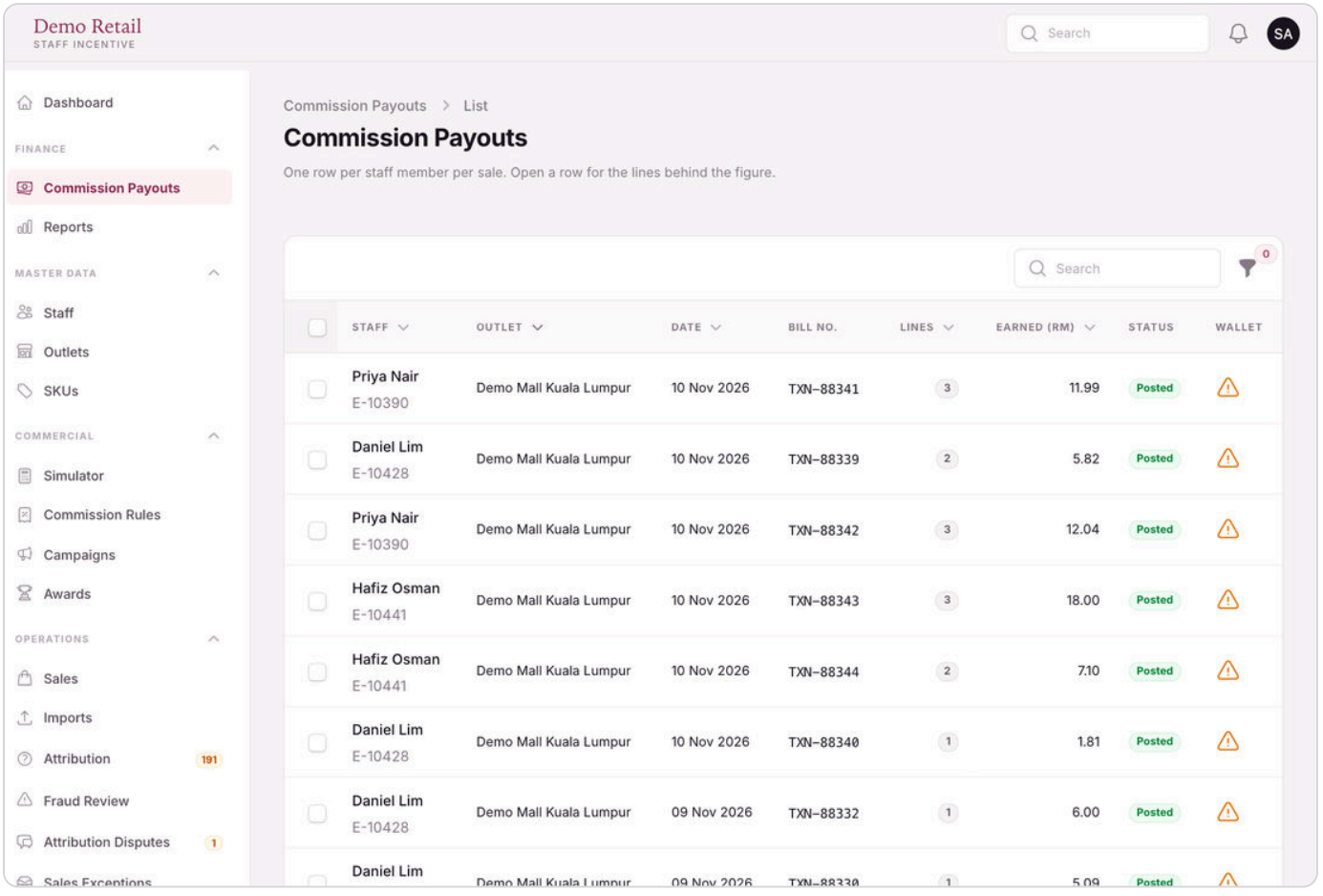
For: Finance

Commission Payouts shows one row per staff member per sale: what was earned, and whether it has reached their balance.

The page opens on the rows that need someone to act: **Failed** and **Held**. Remove that filter to see everything.

The **Status** of each row:

- **Held**: earned but not sent. It waits here until someone releases it.
- **Sending**: released, waiting for the e-wallet to confirm.
- **Posted**: in the staff member's balance, as Pending until it clears.
- **Failed**: the e-wallet refused it or could not be reached. Read the reason and retry; nothing is ever paid twice.
- **Blocked**: an open fraud flag is holding it.
- **Nothing earned**: the line qualified for nothing. It is kept so it can be explained.



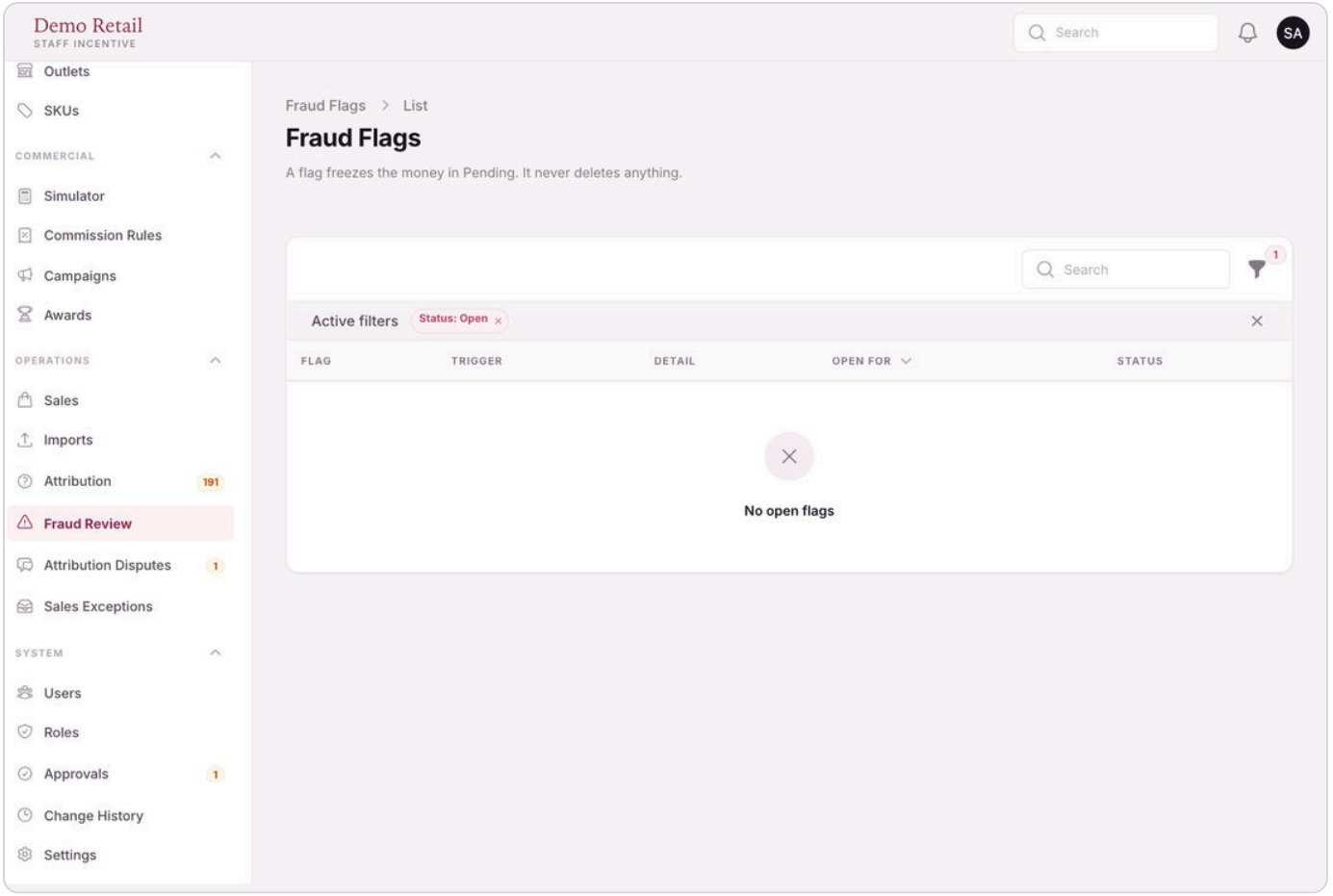
- Tick rows and press **Release Selected**, or **Retry Failed** for refused payouts.

- **Release All Held** sends everything the current filters show, not only the visible page. It tells you how many lines, how many people and the total before you confirm.
- Press a row to see each product line behind the figure, and release or retry single lines.

Whether commission is sent on its own or waits here as **Held** is a setting (**Send commission automatically**). A warning sign in the **Wallet** column means the person's money is kept against their staff record, because they had no sign-in account when they first earned.

Fraud review

Some patterns, such as a sale followed quickly by a return, raise a flag. A flagged amount stays Pending until someone reviews it, so nothing suspicious becomes withdrawable on its own. Open **Fraud Review** and press **Clear Flag** if all is well, or **Uphold** if it is not.



STAFF INCENTIVE

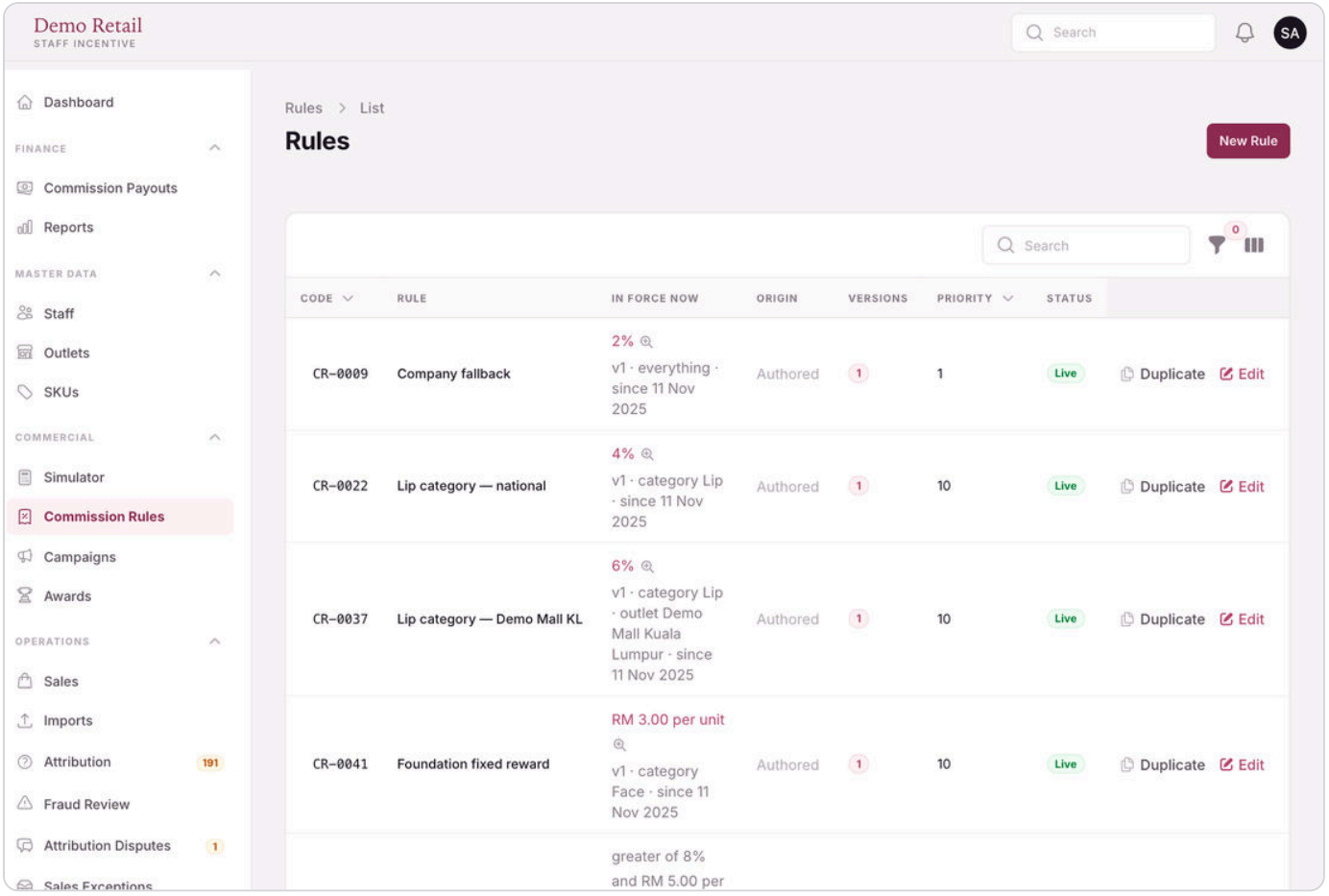
Set commission rules

For: Commercial

Every ringgit of commission comes from a rule. A rule has a code, a scope (which products, outlets, categories or grades it covers), a rate and a priority. A scope left empty covers everything.

When several rules match the same sale line, the one with the highest **Priority** number pays. How narrow a rule is does not matter. Two live rules that overlap at the same priority are flagged so someone can settle it.

1. Open **Commission Rules**. **In force now** shows the rate, scope and start date each rule is paying today. The magnifier opens that version.
2. Press **New Rule** to write one, **Edit** to change one, or **Duplicate** to start from a copy.
3. A change is saved as a new version and goes to **Approvals**. It pays nothing until a second person approves it.

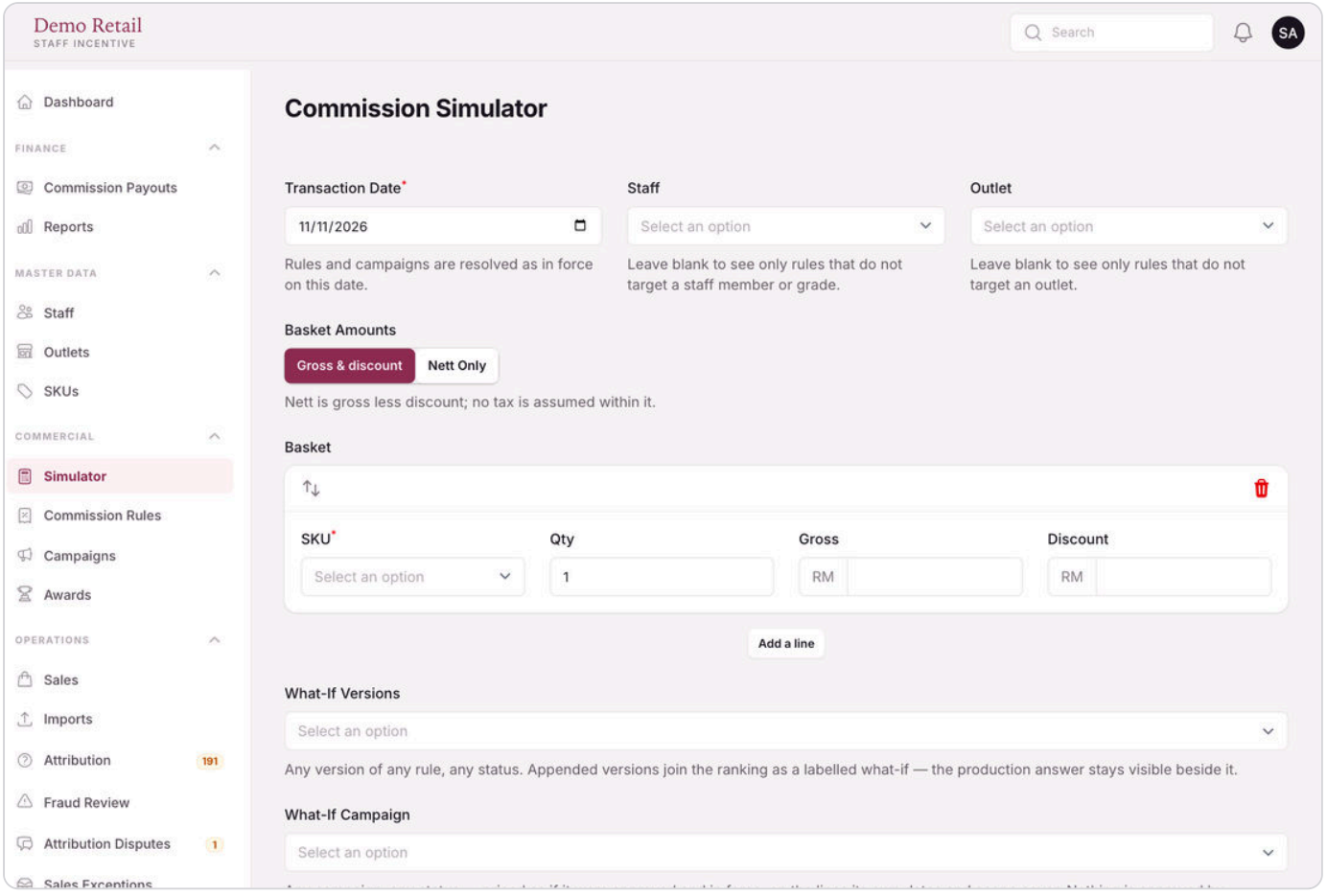


Campaigns add a temporary boost on top of the rules, for example 1.5 times the commission on lip products for two months.

Try a sale before it happens

Simulator shows what a sale would pay, without recording anything.

1. Pick the **Transaction Date**, and the **Staff** and **Outlet** if the rules you are testing are for them.
2. Under **Basket**, pick a **SKU** (product code) and type the quantity and amounts. Press **Add a line** for more products.
3. Choose **Gross & discount** or **Nett Only** for how you type amounts.
4. To compare a proposed change with today's rules, pick it under **What-If Versions** or **What-If Campaign**.
5. Press **Run simulation**. Every matching rule is listed by priority, with the full sum behind its amount.



On the **SKUs** page, the **Rules** column shows what each product pays today. Press it to see every rule that matches the product, side by side.

STAFF INCENTIVE

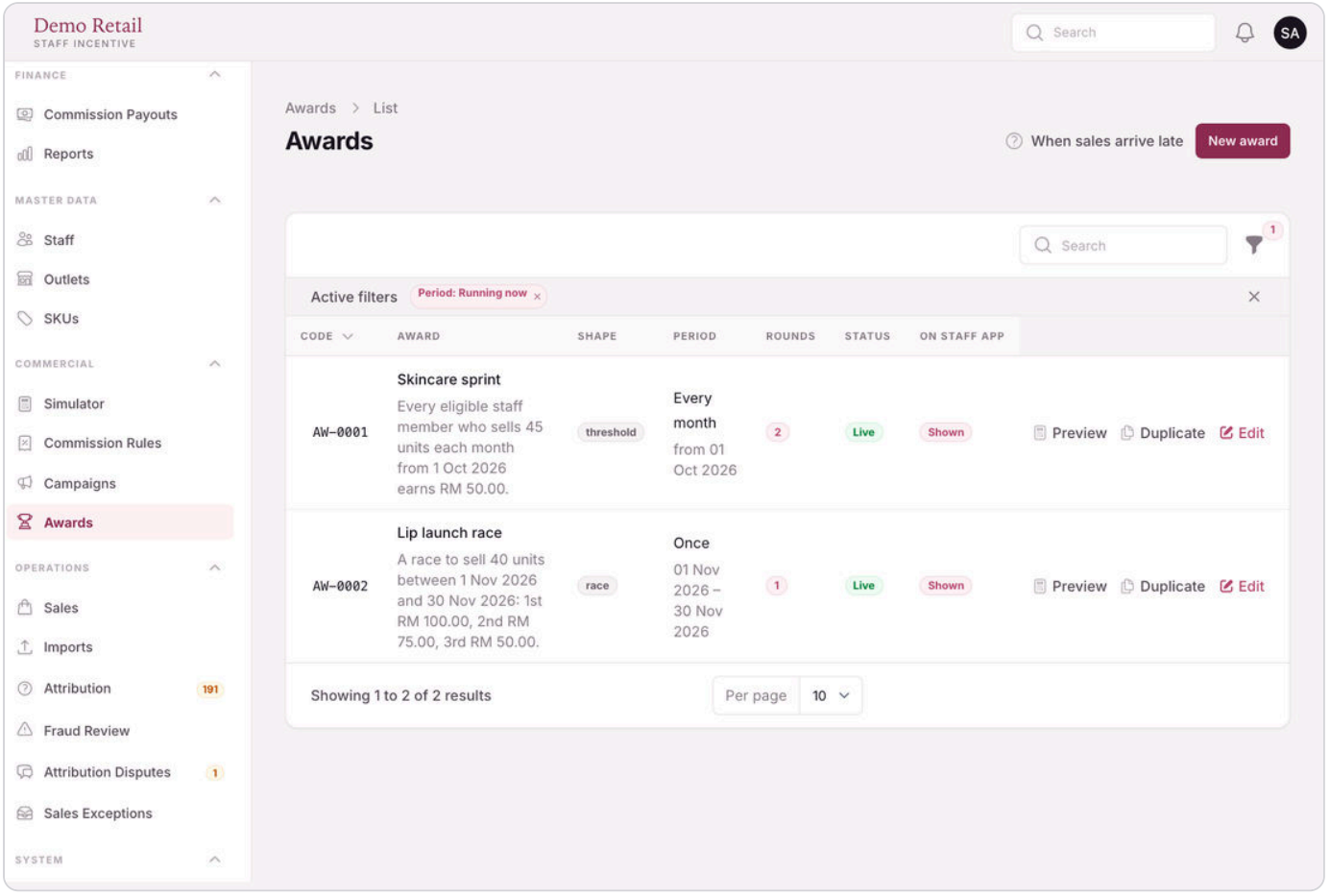
Run awards

For: Commercial

A rule pays a sale line. An award pays a whole period: "sell 45 units this month and earn RM 50", or "first three to 40 units win RM 100, RM 75 and RM 50". Awards are paid on top of commission and never change it.

An award is won in one of four ways:

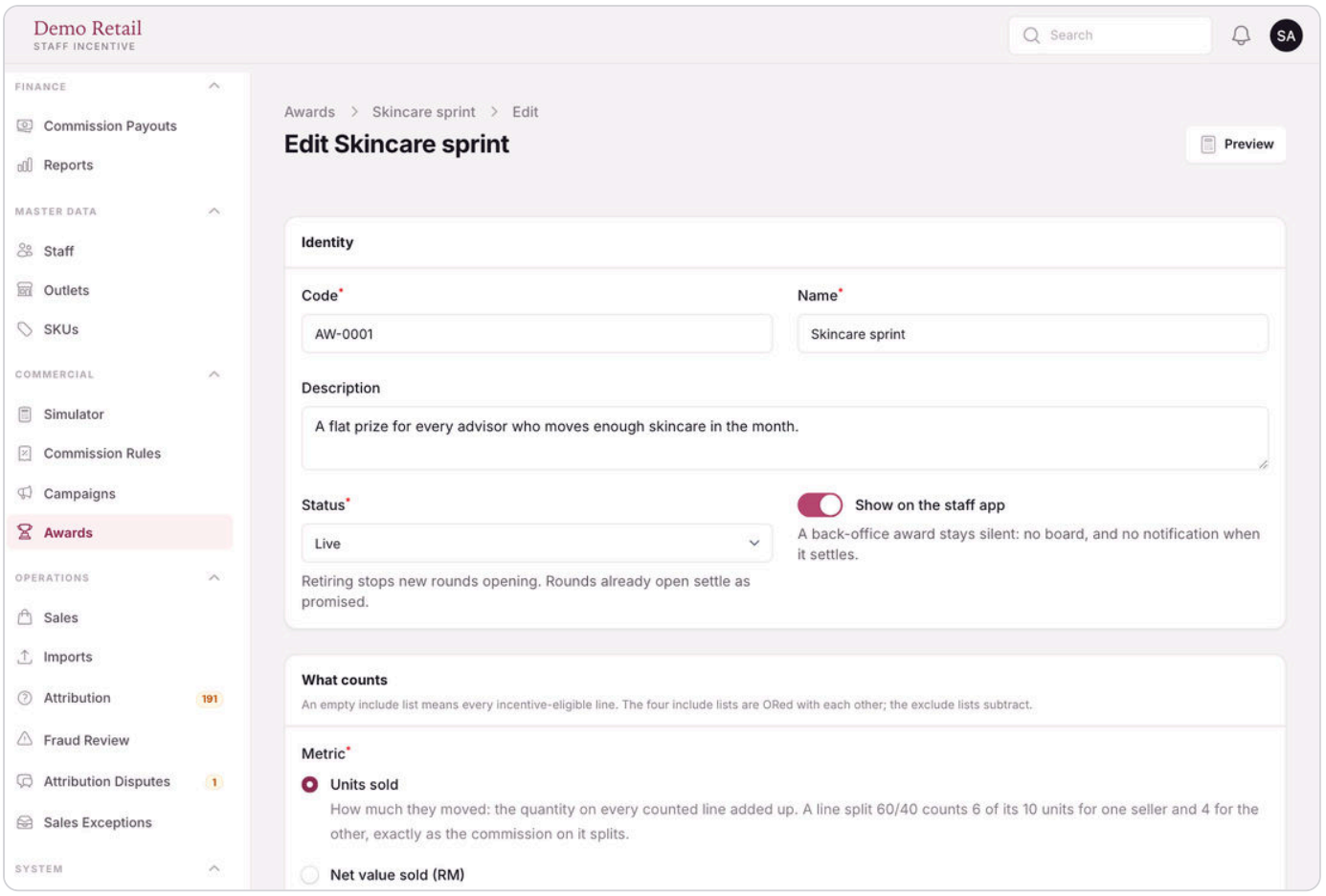
- **Threshold**: everyone who reaches the target is paid. A places limit can cap it to the first few.
- **Race**: the first to reach the target wins, in the order they got there.
- **Rank**: the top few at the end of the period. There is no target.
- **Ladder**: several targets, each with its own prize. The highest one reached pays.



Create or change an award

1. Open **Awards** and press **New award**, or **Duplicate** to copy last period's award, or **Edit**.

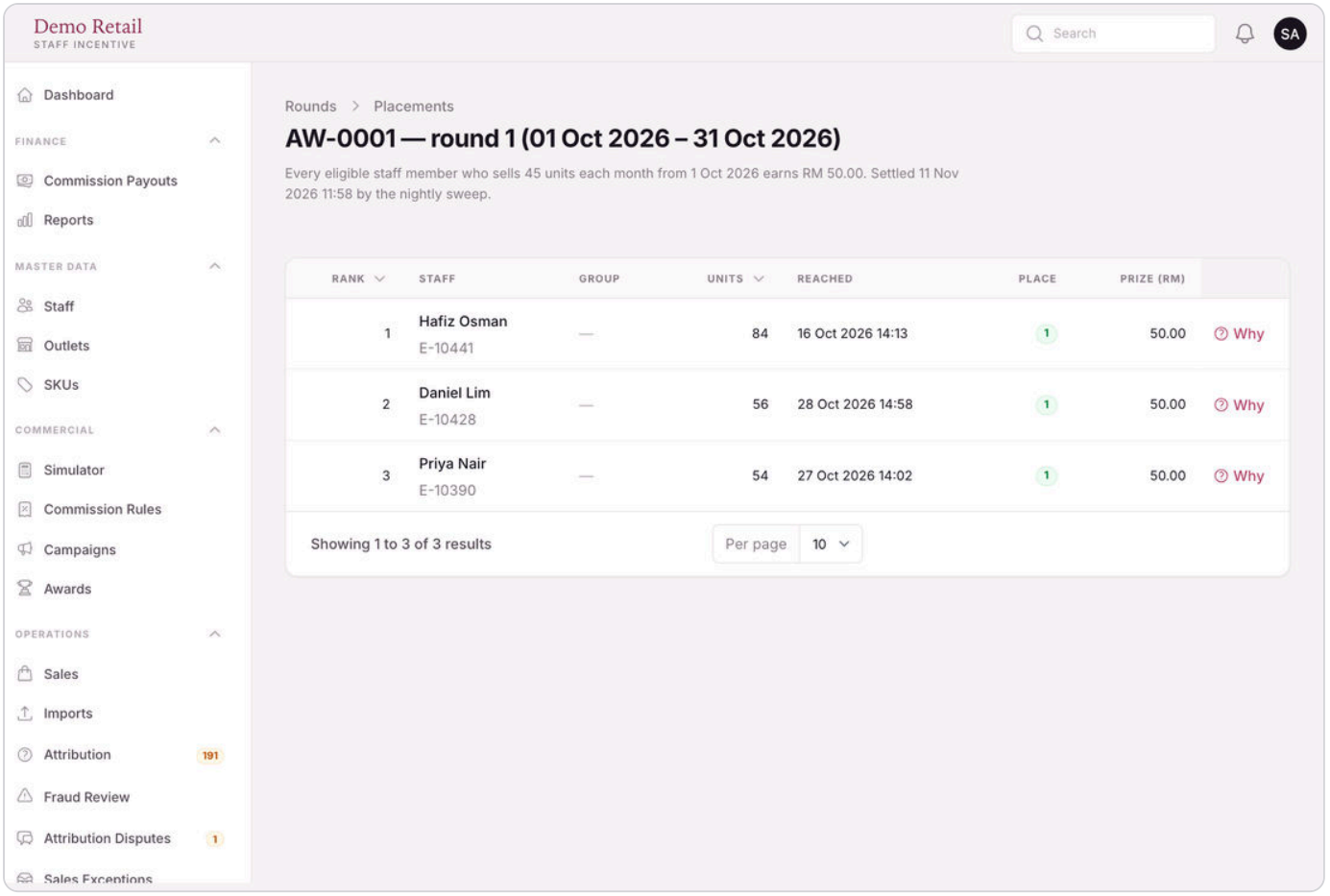
2. Fill the form from top to bottom: identity, what counts, who competes, how it is won, when, and the payout. Under the form, the award is written back as one plain sentence: the same sentence the approver and the staff see.
3. Switch on **Show on the staff app** if staff should see a board and be told when they win.
4. Press **Preview** to see who would have won over a past period and what it would have cost.
5. Save. Publishing goes to **Approvals**; a draft pays nothing.



Rounds and results

A running award opens one round per period. A round settles after its period ends plus a few cooling-off days, so late sales and corrections can still land. Then prizes are either paid on their own, or the round goes to **Approvals** first, depending on the award.

Press **Results** on a round to see everyone who counted, not only the winners. **Why** on a row shows the figure, the target, the place and any tie-break.



A round can be changed with **Settle now** (skip the remaining wait), **Recompute** (after a late import), **Cancel** (end it unpaid) or **Reverse** (take back the prizes of a settled round; it cannot be settled again). All are recorded.

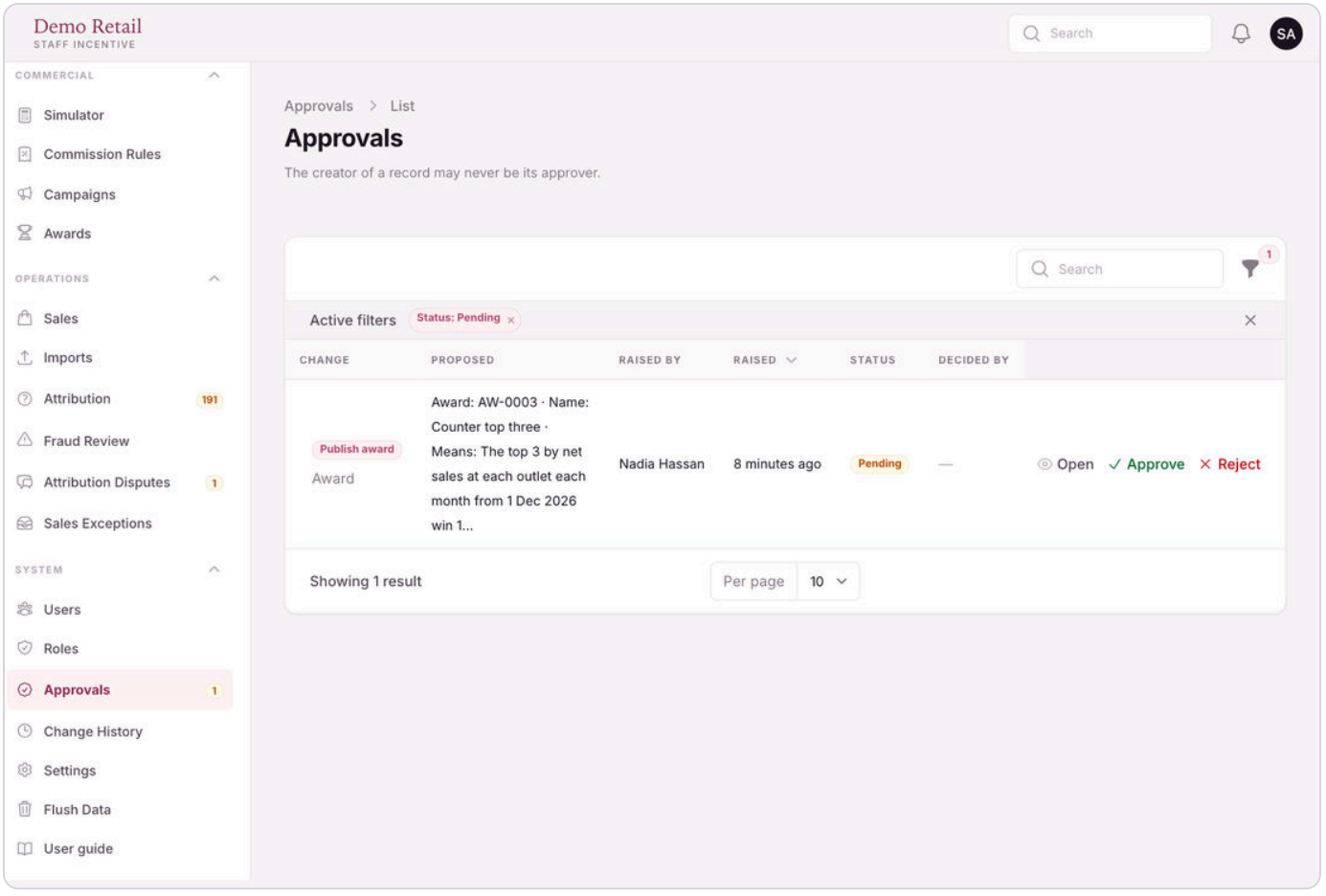
Late sales count only while the round is open. Read **When sales arrive late** on the **Awards** page before importing old sales: once a round is settled, a late import changes nothing, and the only way back is **Reverse**.

Approve a change

For: Approvers

Anything that changes how money is worked out needs a second person: new rule versions, awards, settings and some adjustments. The person who made the change can never approve it.

1. Open **Approvals**. The number in the menu counts what is waiting.
2. Read **Proposed**. Press **Open** for the full detail.
3. Press **Approve** or **Reject**.



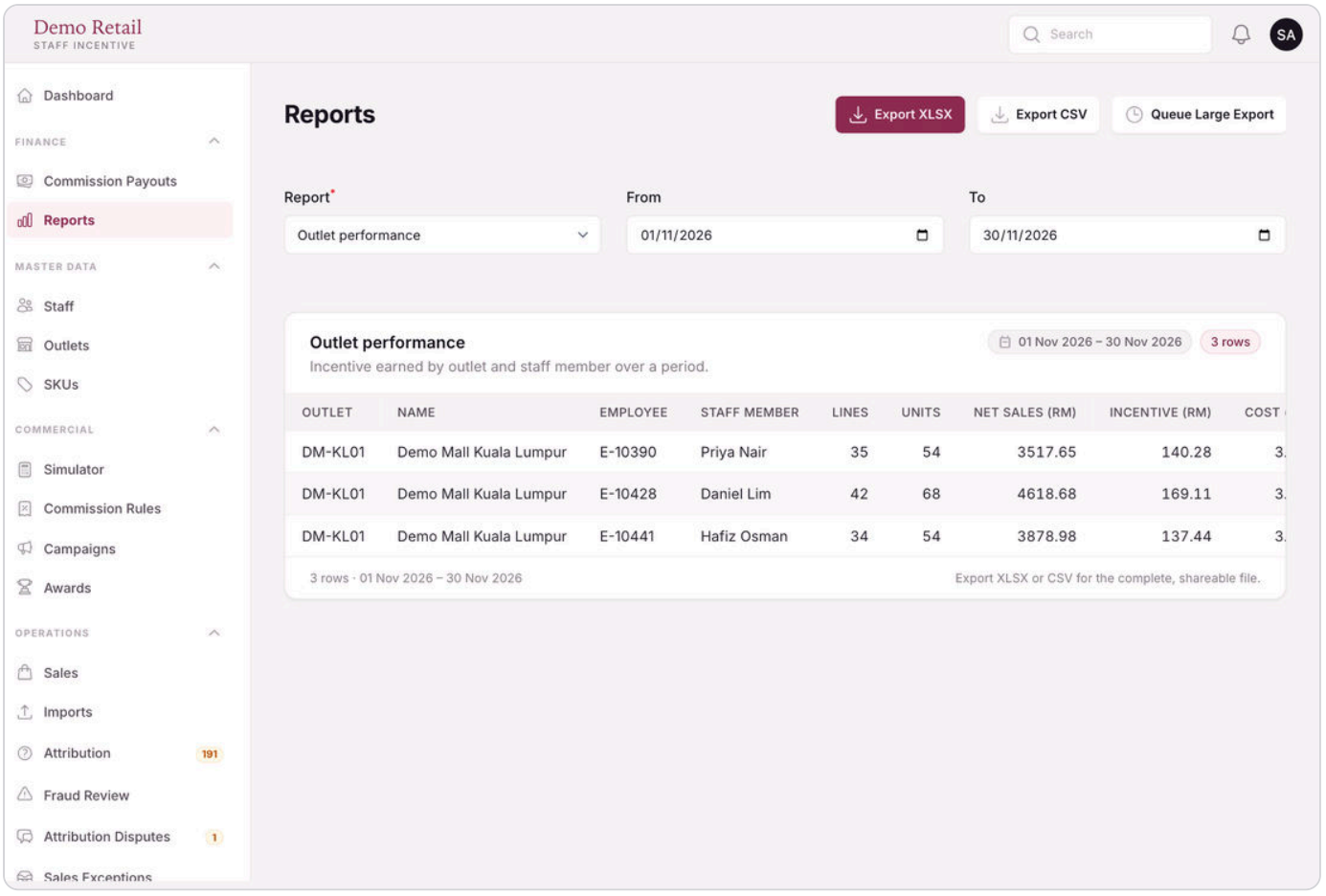
Change History lists every change and action in the admin panel, with who did it and what the record said before.

Get reports

For: Finance

1. Open **Reports**.
2. Pick the **Report**, for example **Outlet performance**, **Staff performance**, **Outstanding liability**, **Payment register** or **Annual earnings summary**.
3. Set **From** and **To**. The first rows appear below.
4. Press **Export XLSX** or **Export CSV** for the full file.

For a very long period, press **Queue Large Export** and collect the file when it is ready.



STAFF INCENTIVE

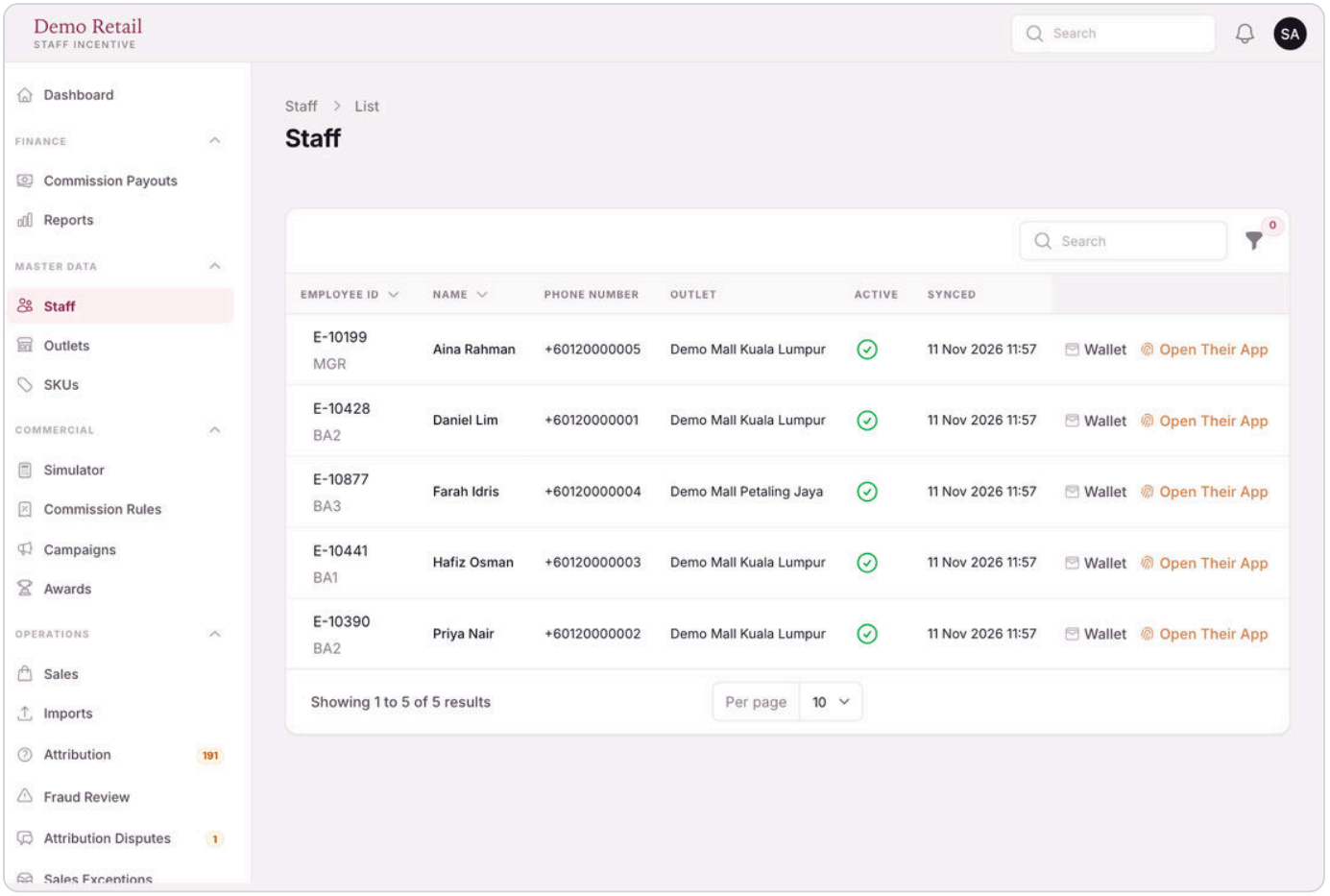
Check staff, outlets and products

For: Administrators

Staff, **Outlets** and **SKUs** (product codes) come from your company's staff directory and product list. They are kept up to date automatically, not typed in here. When an imported sale does not match, check here that the staff code, outlet or product exists.

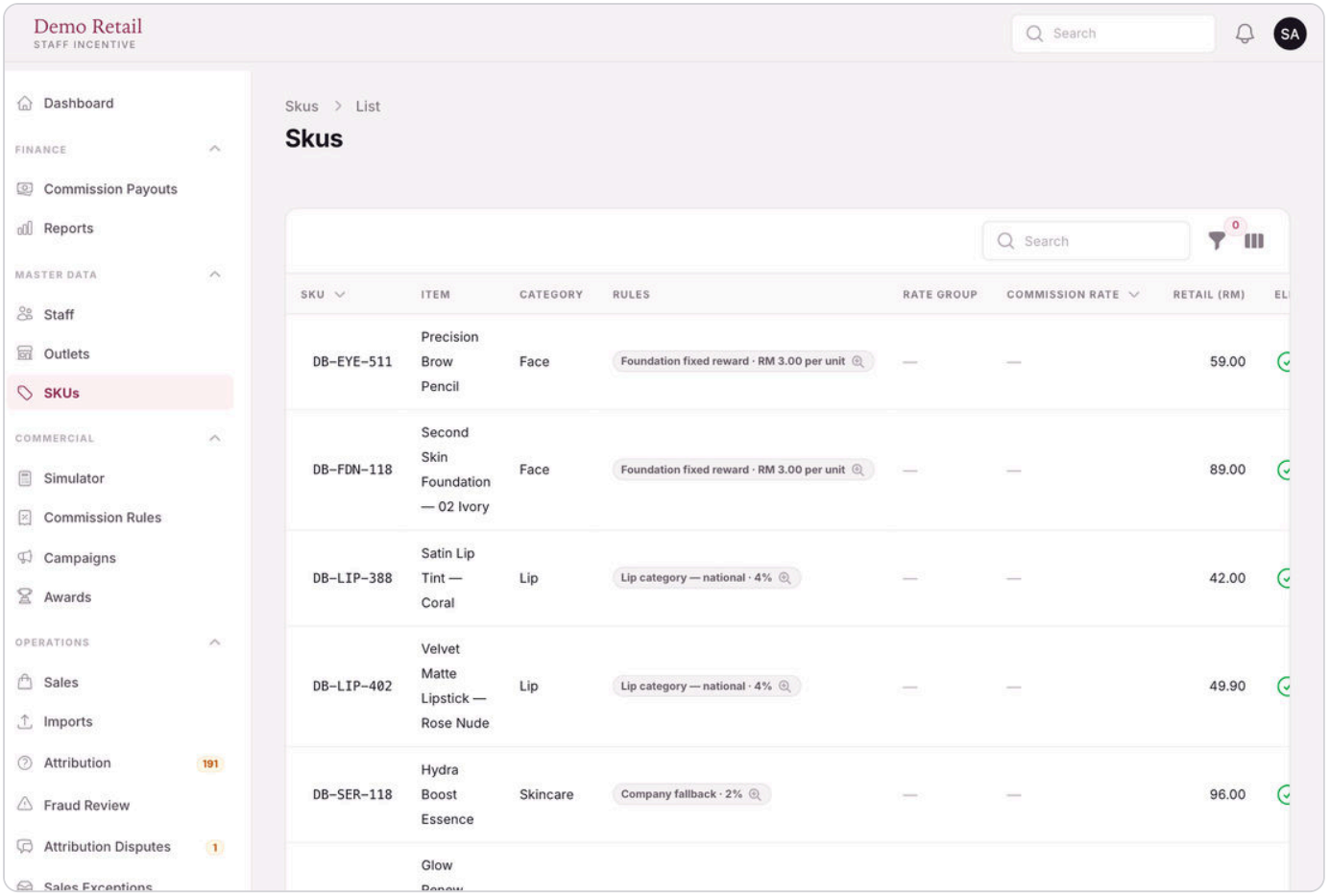
On **Staff**:

- **Wallet** shows that person's balance, read only.
- **Open Their App** shows the staff app exactly as they see it. Only authorised administrators can use it.



On **SKUs**:

- **Rules** shows what each product pays today. Press it to see every rule that matches.
- **Amend** renames a product or switches it off without changing what it has already paid.
- **Eligible** is the master switch. Off means no rule pays on that product.



Outlets sets, for each outlet, how a shared sale is split between staff (**Attribution**).

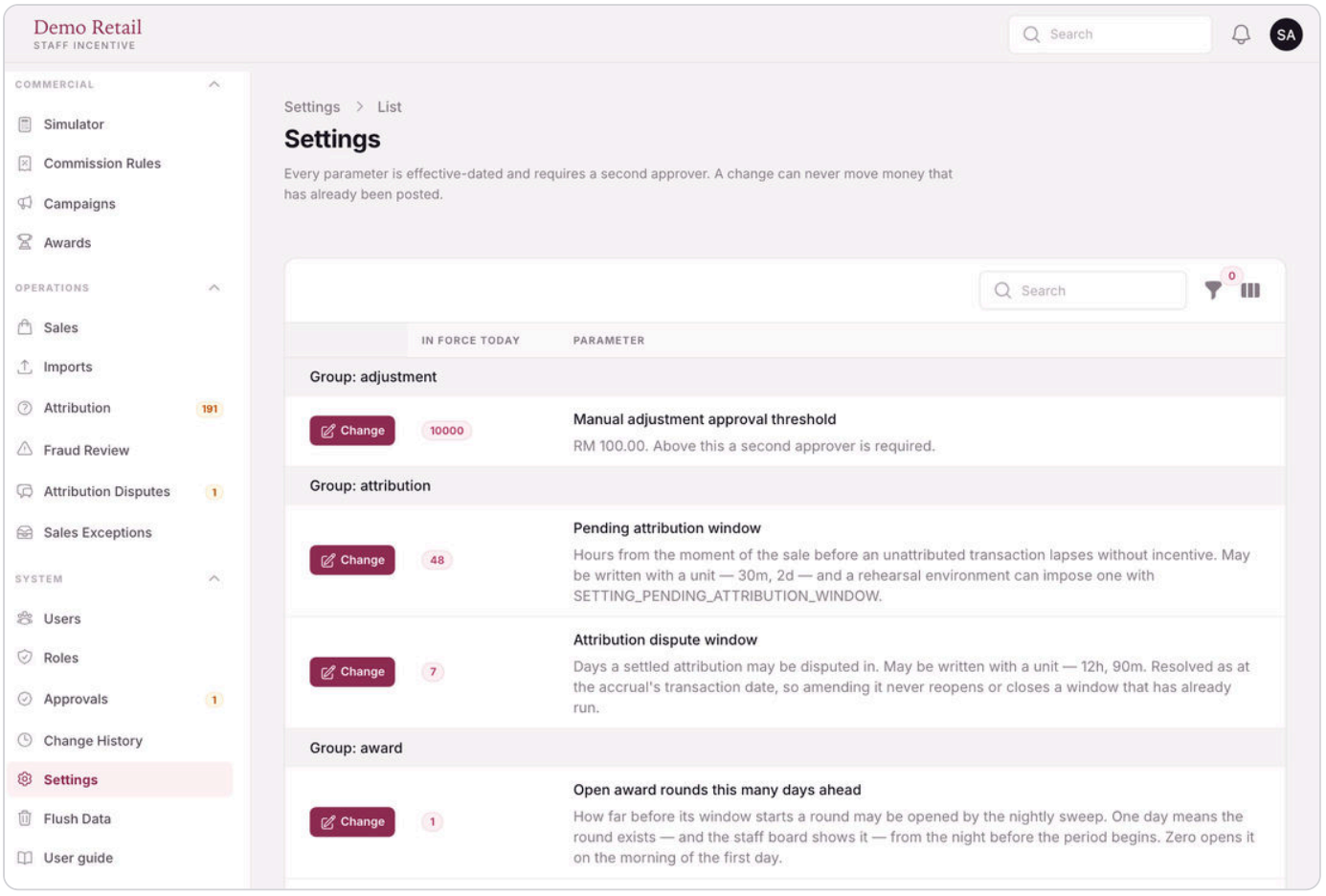
Settings, users and roles

For: Administrators

Settings

Settings holds the numbers the whole module runs on: how long a sale can wait for a name, how long commission stays pending, whether commission is sent automatically, prize settlement, and more. Each one says in plain words what it does.

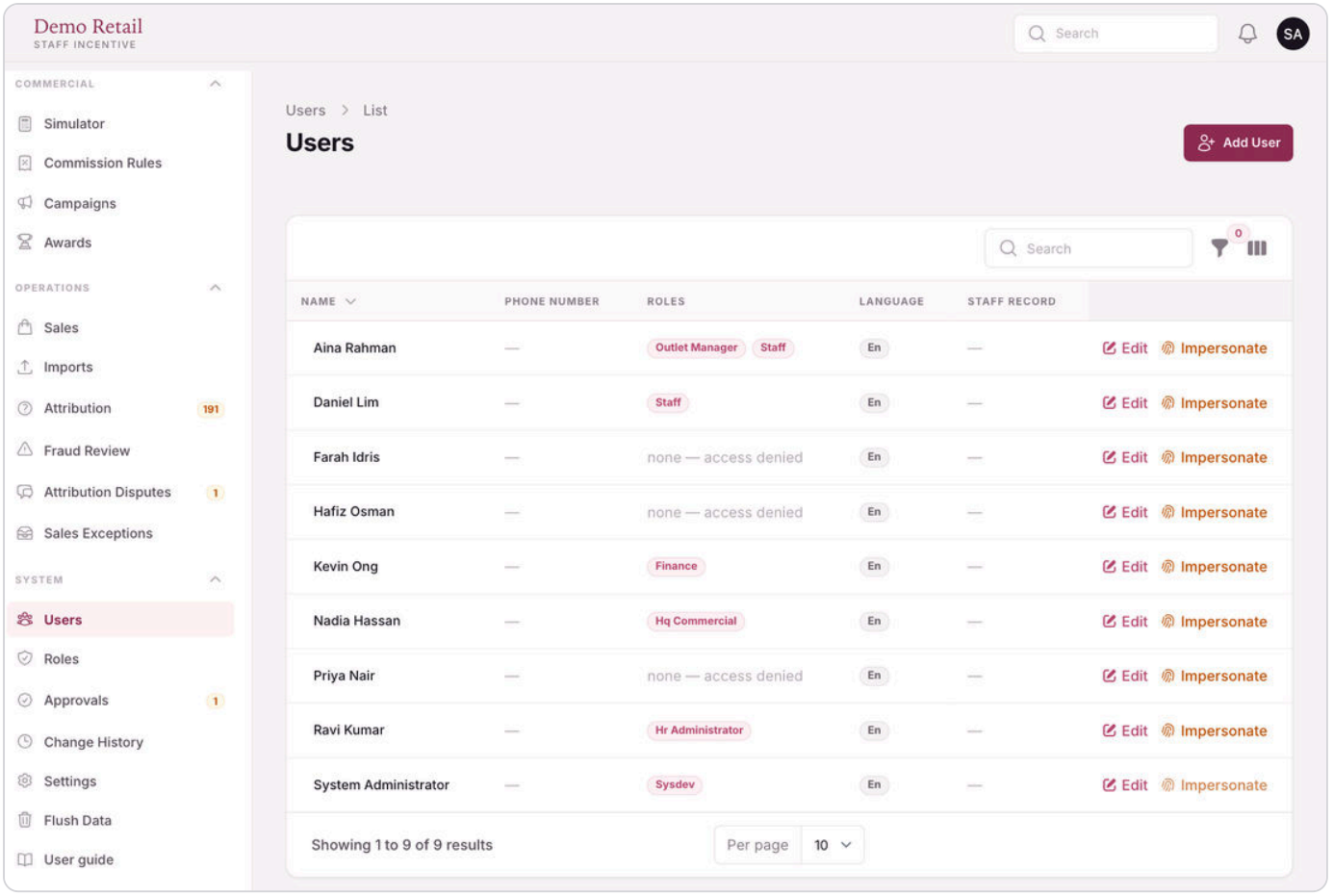
Press **Change** to propose a new value. Every change needs a second approver, and a change never moves money that has already been paid. Where a date matters, you choose when the new value starts.



Users and roles

Users lists who can sign in, with their roles. Press **Add User** to add one or **Edit** to change one. **Impersonate** lets an administrator see the panel as that person, to check what they can reach. A user with no role sees "none — access denied".

Roles sets what each role can reach. Only permissions the module really checks are listed, so ticking a box always changes something.



Flush Data in the menu empties whole groups of data, such as all sales or all payouts, so they can be loaded again. Users, roles, settings and the staff directory are never touched. What it deletes cannot be brought back.

USER GUIDE · VERSION 1

Payment system

Takes online card and bank payments for your other systems, sends payment links to customers, and pays each merchant's daily takings into its bank account.

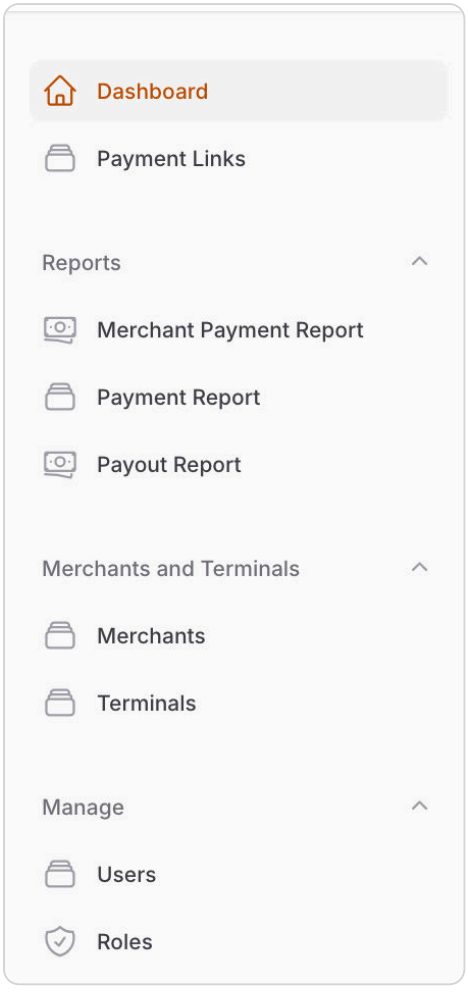
1. What it is for
2. Find a payment
3. Send a payment link
4. What a customer sees before paying
5. Pay out a merchant's daily sales
6. Check a payout
7. Set up a merchant
8. Connect another system
9. Give someone access

PAYMENT SYSTEM

What it is for

For: Everyone

The Payment system sits between your company's systems and the bank's online payment service. Your web shop, membership app or till asks it to take a payment, the customer pays on the bank's page, and the Payment system records the result and tells the system that asked. Staff can also send a customer a payment link by email. Once a day it adds up each merchant's paid sales so finance can pay them into the merchant's bank account.



Words used on the screens

- **Merchant**: a business that receives money, for example your online store or one outlet. Each merchant can have one bank account.
- **Terminal**: one system that is allowed to take payments for a merchant, for example the web shop or the membership app. Each terminal has a four-digit **Code** that starts every order number it makes.

- **Payment link**: a web address you email to a customer so they can pay an invoice.
- **Payout**: money sent out of your company account to a merchant's bank account.

Who uses it

- **Finance and customer service staff** look up payments and send payment links.
- **Finance** checks the daily merchant reports and sends payouts.
- **Administrators** set up merchants and terminals and decide who can do what. The role that can do everything is called **Super Admin** on screen.

What it needs

- A live account with the bank's online payment service, and a separate one for sending payouts. Without them, looking things up works, but taking payments, sending payment links, checking a payment with the bank and sending payouts do not.
- Staff sign in with the company's shared sign-in. A person appears in **Users** after their first sign-in.

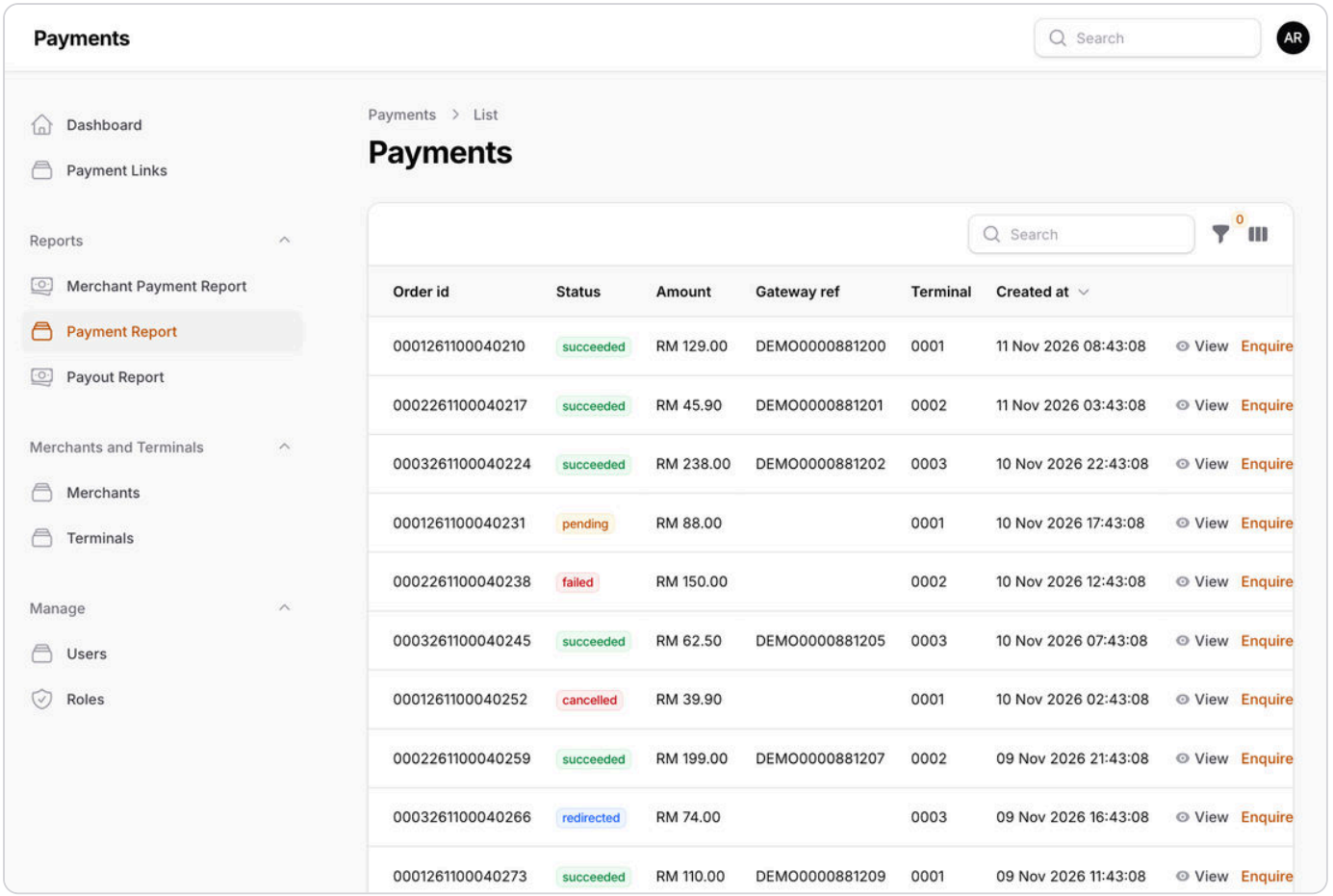
PAYMENT SYSTEM

Find a payment

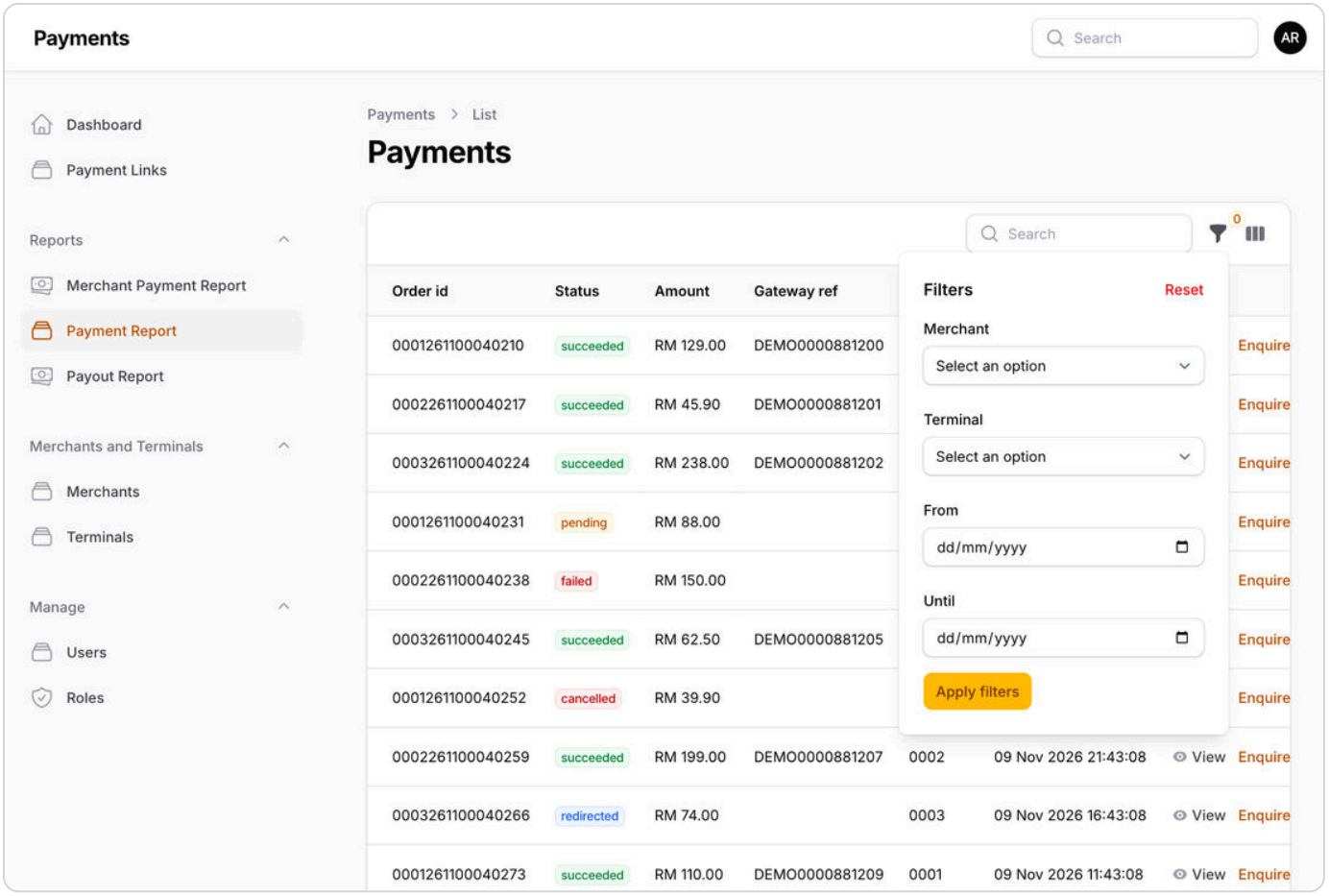
For: Finance and customer service

Use this when a customer says they paid, or a system shows an order as unpaid.

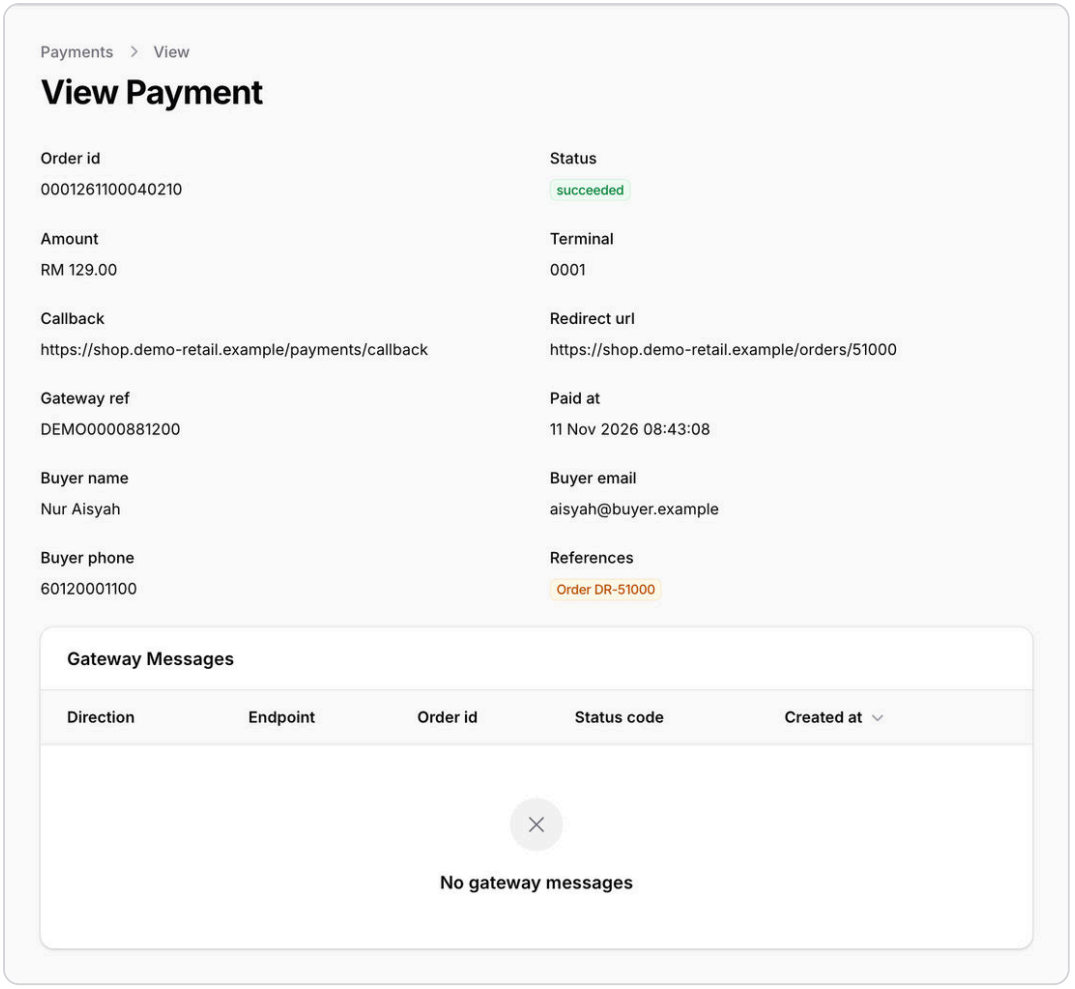
1. Open **Payment Report** under **Reports** in the menu on the left. The newest payments are at the top.
2. Type the order number into **Search** above the list. Each order number starts with the four-digit code of the terminal that made it.



3. To narrow the list, press the funnel button next to **Search**. Pick a **Merchant**, a **Terminal**, or a date range in **From** and **Until**, then press **Apply filters**. **Reset** clears them.



4. Press **View** on a row to see everything about that payment: the amount, who paid, when, the bank's reference (**Gateway ref**), and the references the ordering system sent.



What the status means

Status	Meaning
initiated	The order was made, but the customer has not gone to pay yet.
redirected	The customer was sent to the bank's payment page.
pending	The bank has not given a final answer yet.
succeeded	The money was received.
failed	The payment did not go through.
cancelled	The customer or the bank stopped the payment.

The Payment system checks unfinished payments with the bank every five minutes on its own.

Two buttons on each row

- **Enquire now** asks the bank for the latest result straight away. Use it when a customer has proof of payment but the status has not changed. It needs the live bank account.
- **Re-send Callback** sends the result to the system that made the order again, for example when the web shop missed it and still shows the order as unpaid.

Only **Super Admin** sees these two buttons today.

PAYMENT SYSTEM

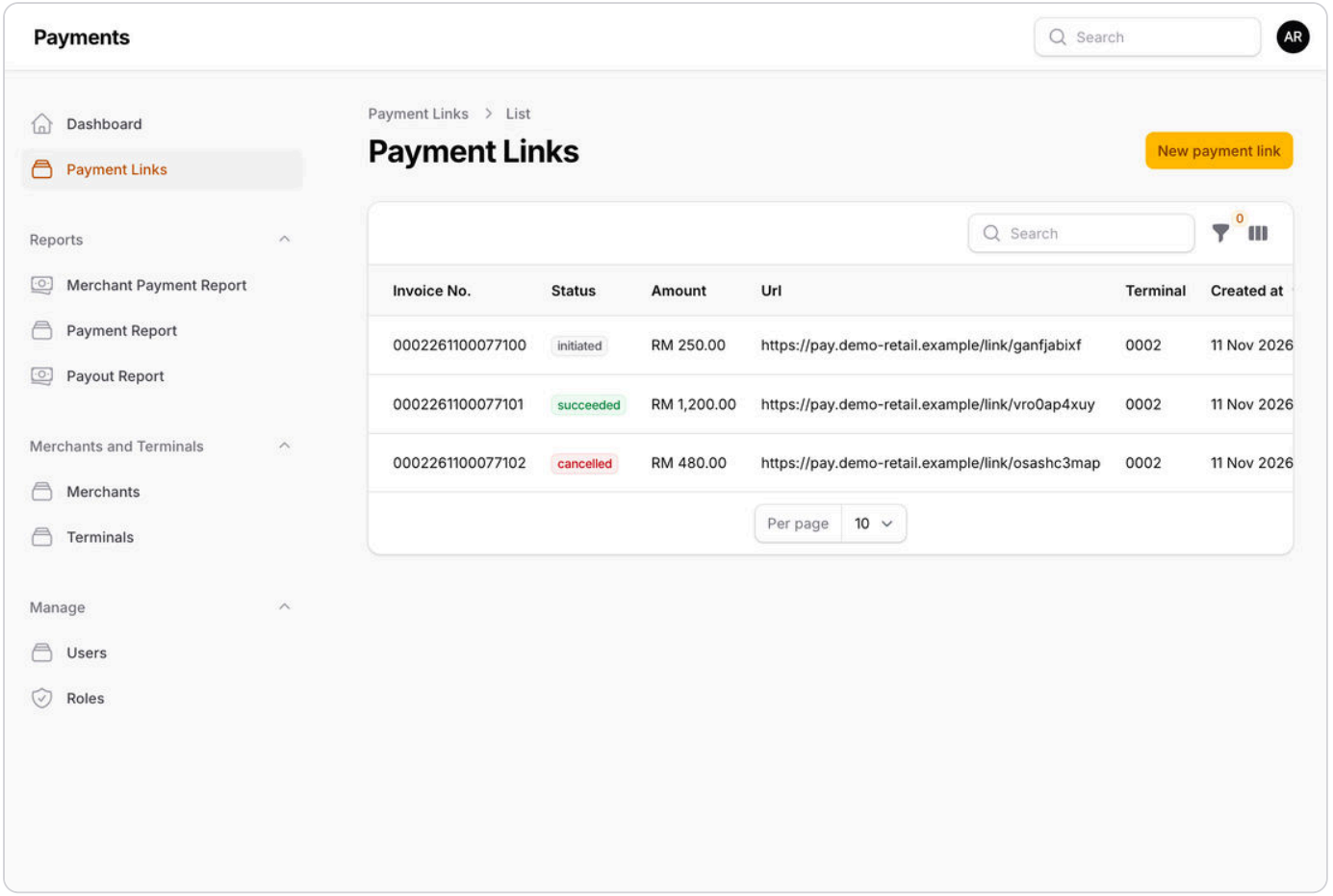
Send a payment link

For: Finance and customer service

A payment link lets a customer pay an invoice from an email, without going through the web shop.

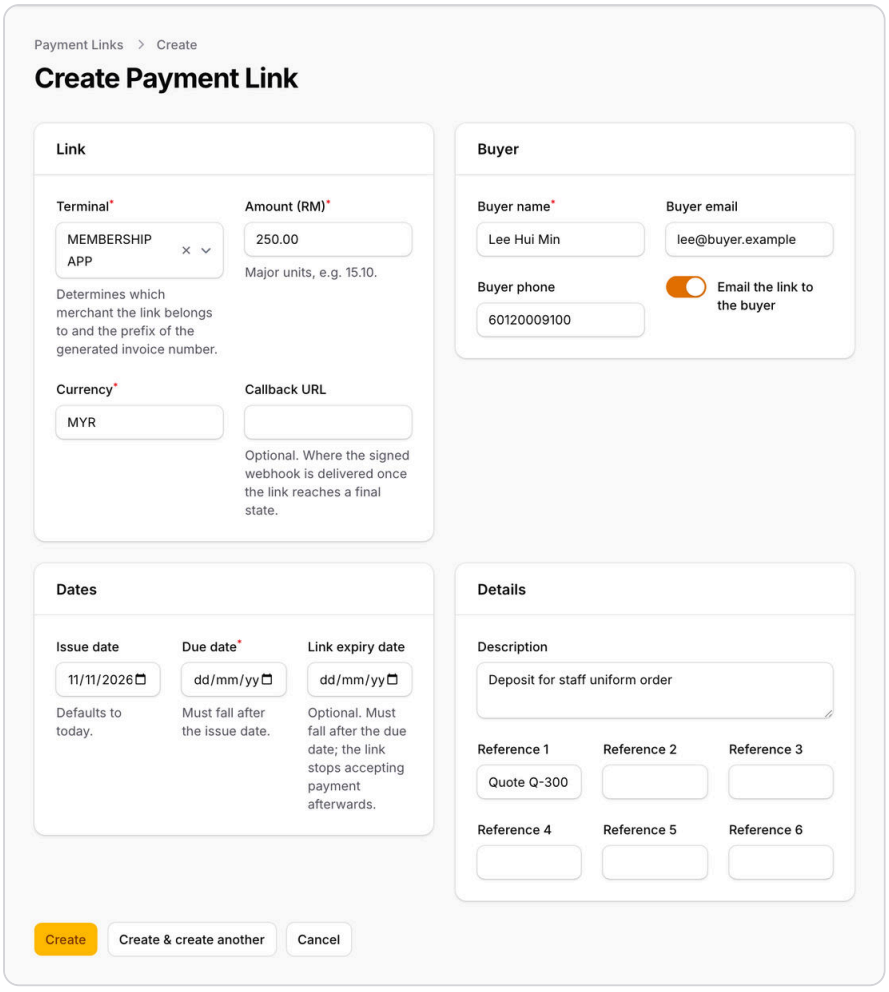
Needs the live bank account. The link is made by the bank, so **Create** only works when the Payment system is connected to it. You can fill in the form without it, but saving will show an error.

1. Open **Payment Links** in the menu on the left. The list shows every link with its **Invoice No.**, status and amount.

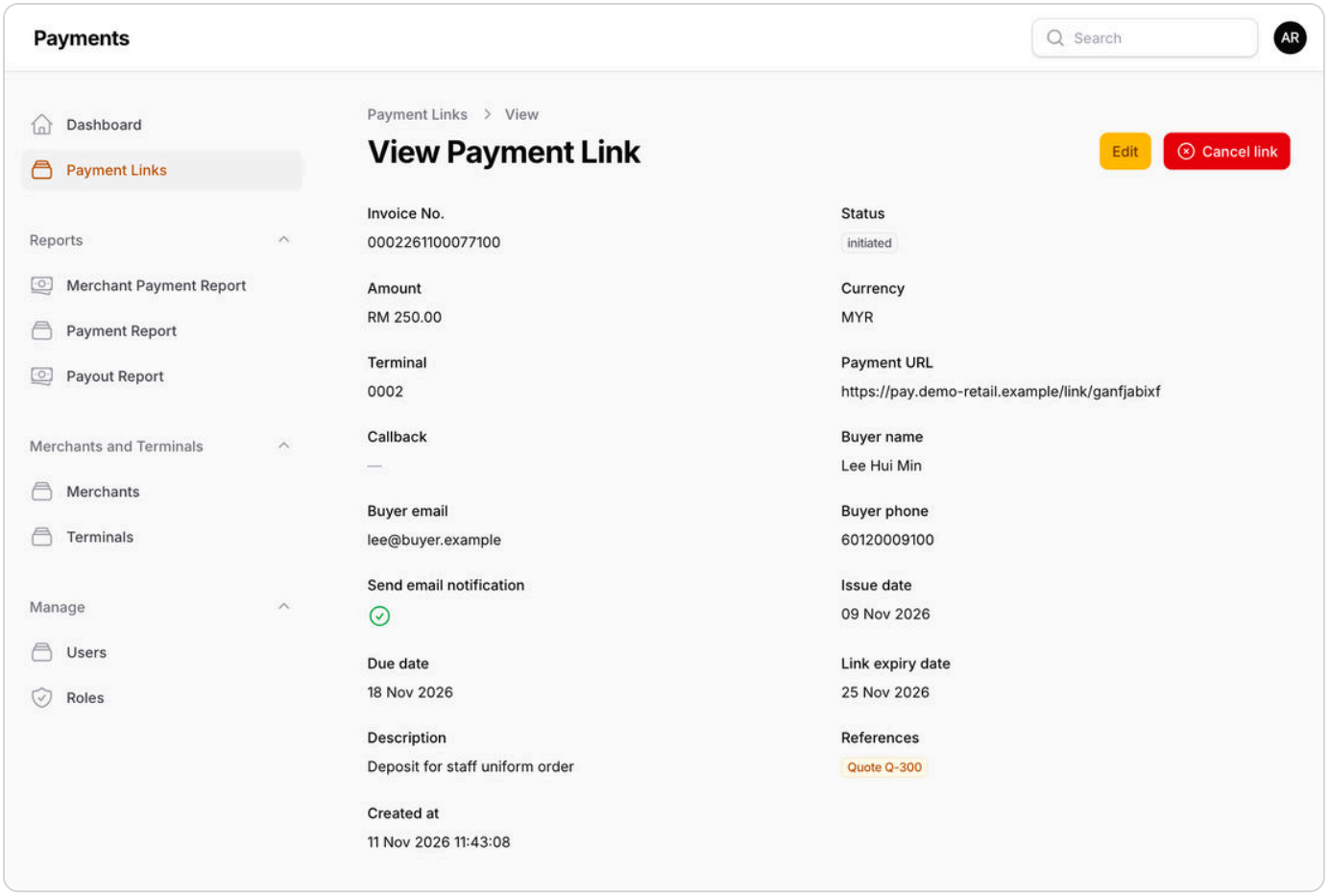


2. Press **New payment link** at the top right.
3. Under **Link**, pick the **Terminal**. It decides which merchant receives the money and the first four digits of the invoice number.
4. Type the **Amount (RM)** in ringgit and sen, for example 15.10. Leave **Currency** as MYR.

5. Under **Buyer**, type the customer's name, email and phone. Leave **Email the link to the buyer** switched on to have the bank email it.
6. Under **Dates**, pick a **Due date** after the **Issue date**. A **Link expiry date** is optional: after that day the link cannot be paid.
7. Under **Details**, add a **Description** the customer will see, and up to six references for your own records, for example a quote number.
8. Press **Create**.



After saving, the link's page shows the **Payment URL**. You can copy it and send it yourself.



Change or withdraw a link

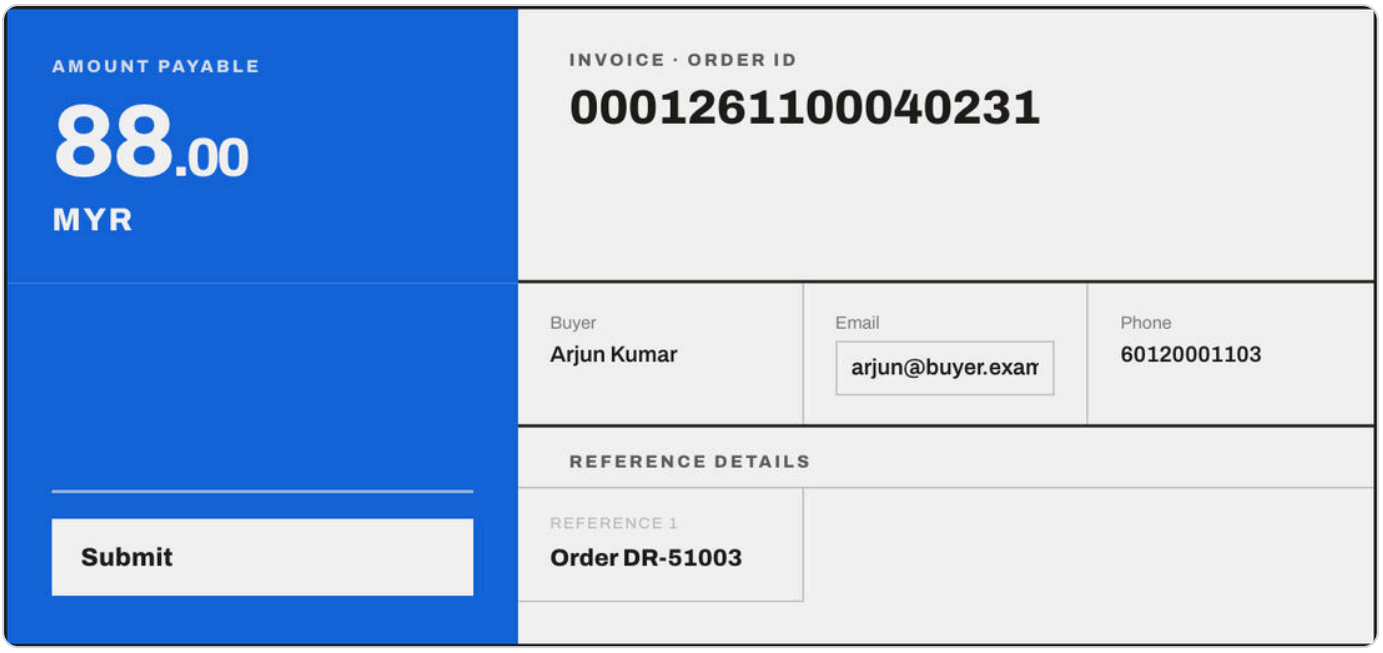
- **Edit** changes the amount, buyer details or dates while the link is still unpaid.
- **Cancel link** withdraws it at the bank so it can no longer be paid. This cannot be undone.
- Links cannot be deleted, because a deleted link could still be paid at the bank.

Both buttons need the live bank account.

What a customer sees before paying

For: Everyone

When a customer pays through your web shop or app, the Payment system first shows them a short summary. Nothing is charged on this page.

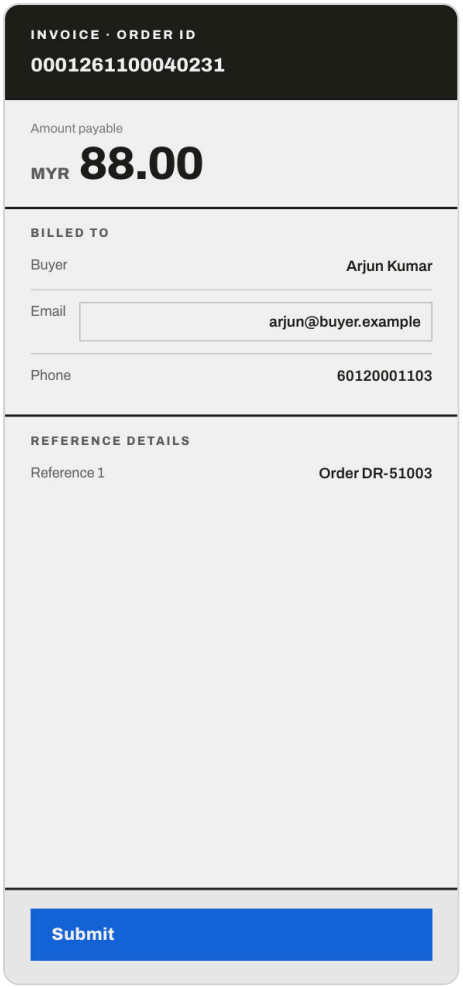


The customer checks:

- **Amount payable** and the **Order ID**.
- Their name and phone number.
- Their **Email**. They can correct it here, and the corrected address is the one passed back to your shop.

Pressing **Submit** takes them to the bank's own payment page. That step needs the live bank account, so it is not shown here.

The page fits a phone screen:



The page works only once and for a limited time. If the customer opens an old one, they see an error and need to start the payment again from the shop.

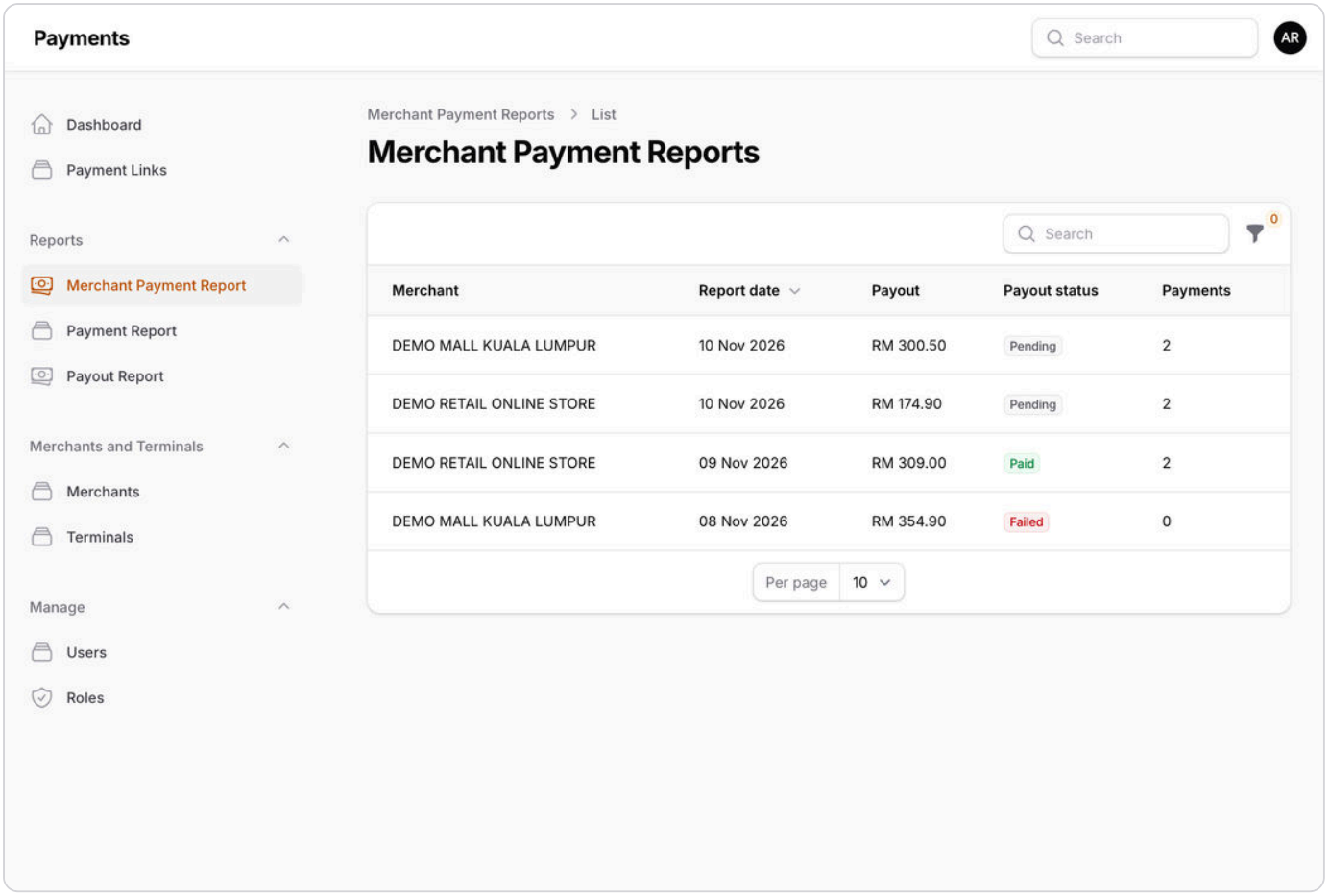
PAYMENT SYSTEM

Pay out a merchant's daily sales

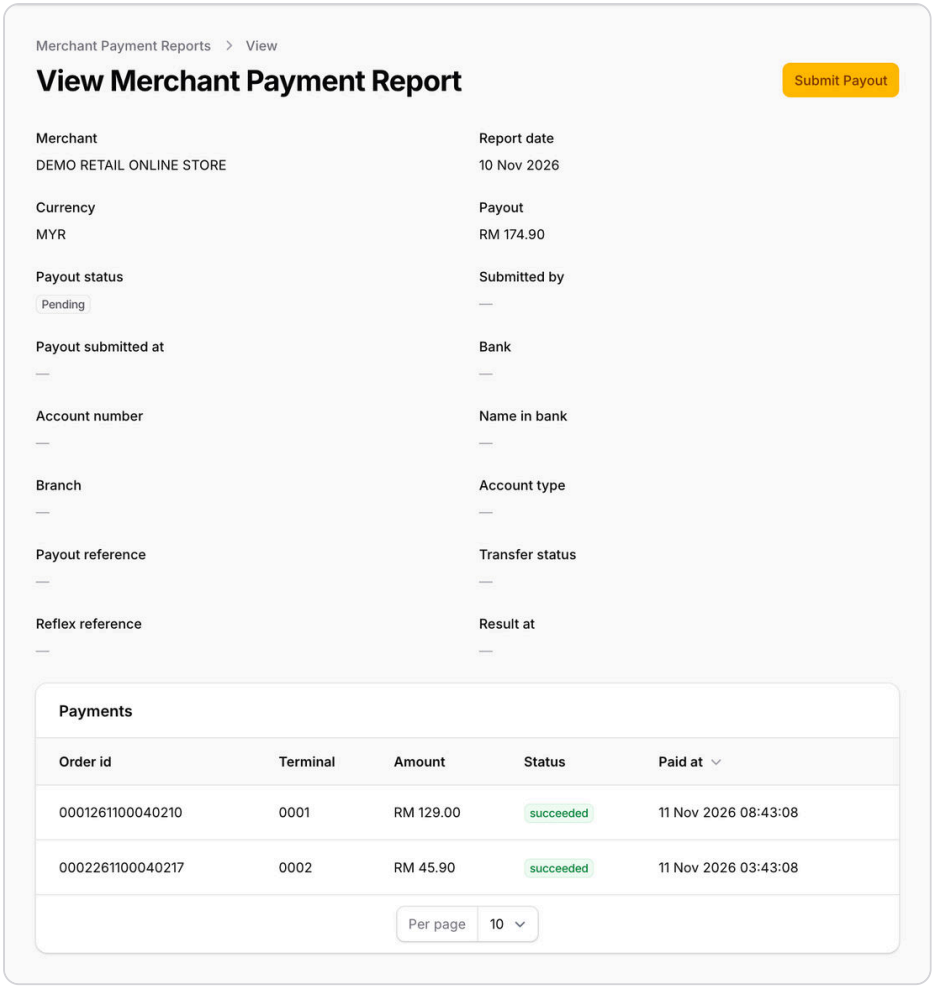
For: Finance

Every night at 1 am the Payment system makes one report per merchant for the day before. Each report adds up the merchant's paid sales that are not in an earlier report.

1. Open **Merchant Payment Report** under **Reports** in the menu.



2. Press a row. The report opens in a new tab.
3. Check the **Payout** amount against the **Payments** listed underneath.
4. Press **Submit Payout** at the top right, read the amount and bank account in the box that opens, and confirm.



Needs the live payout account. Sending money uses the bank's payout service. Without it, **Submit Payout** cannot send anything.

When Submit Payout is greyed out

Point at the button to see why:

- The merchant has no active bank account. Add one on the merchant's page (see *Set up a merchant*).
- There is nothing to pay out.
- The bank account is missing the account type or the contact number.

Payout status

Status	Meaning
Pending	Not sent yet.
Submitted	Sent to the bank.
Pending Result	The bank has not confirmed the result.

Status	Meaning
Paid	The money arrived.
Failed	The bank refused it.

If a payout **Failed**, fix the merchant's bank details, open the report again and press **Regenerate Payout**. This makes a new report with the same payments, ready to send again.

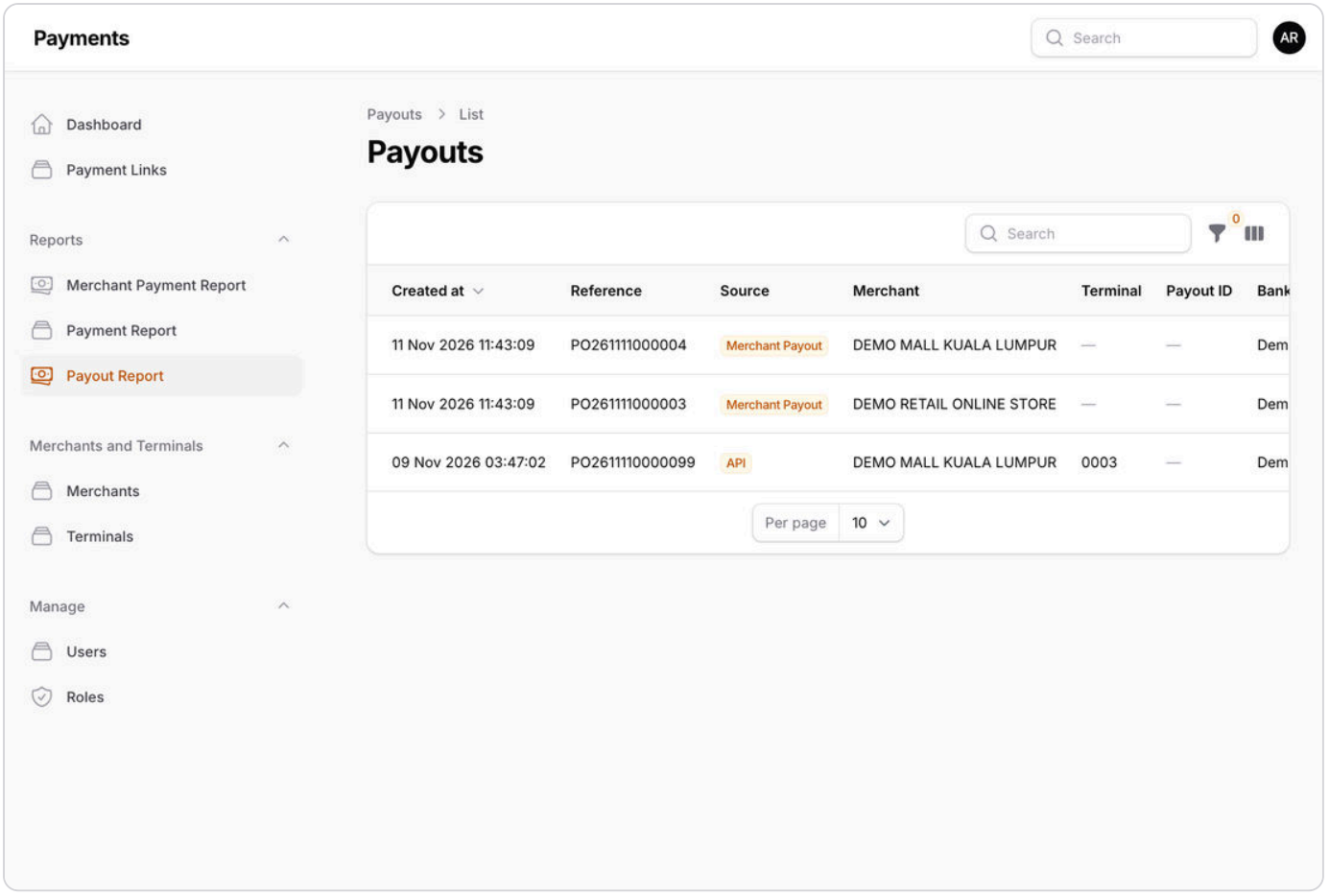
PAYMENT SYSTEM

Check a payout

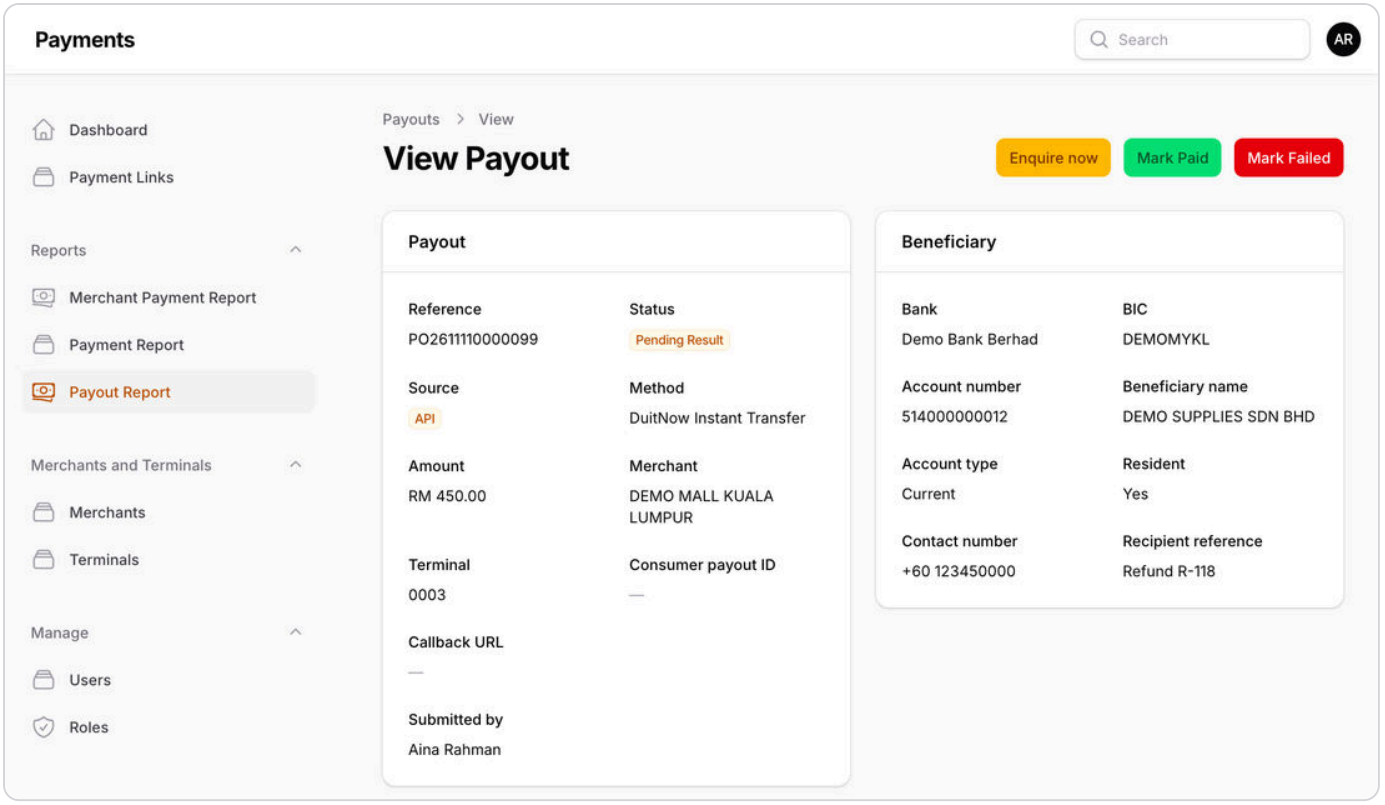
For: Finance

Payout Report lists every payout: the daily merchant payouts (**Merchant Payout**) and any sent by another system (**API**), for example a refund.

1. Open **Payout Report** under **Reports** in the menu.
2. Use **Search**, or the funnel button to filter by merchant, terminal or date.



3. Press a row to see the payout: amount, merchant, who submitted it, and the receiving bank account under **Beneficiary**. If the bank refused it, the reason is under **Error message**.



When a payout stays on Pending Result

The Payment system asks the bank every five minutes. If the bank still has not answered:

- Press **Enquire now** to ask again straight away. This needs the live payout account.
- If you confirmed the result with the bank yourself, press **Mark Paid** or **Mark Failed**. You must write how you confirmed it. Only do this after checking with the bank.

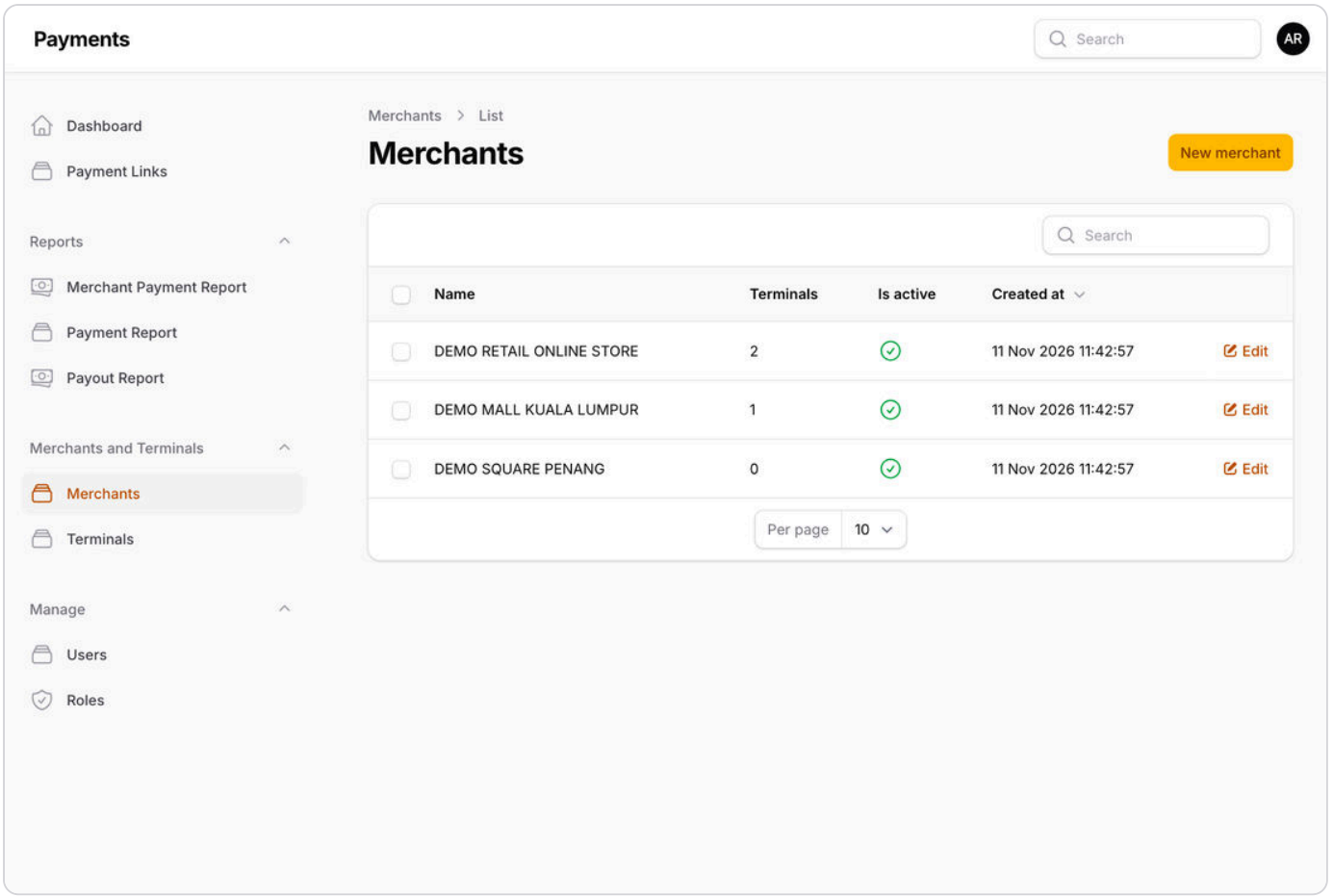
PAYMENT SYSTEM

Set up a merchant

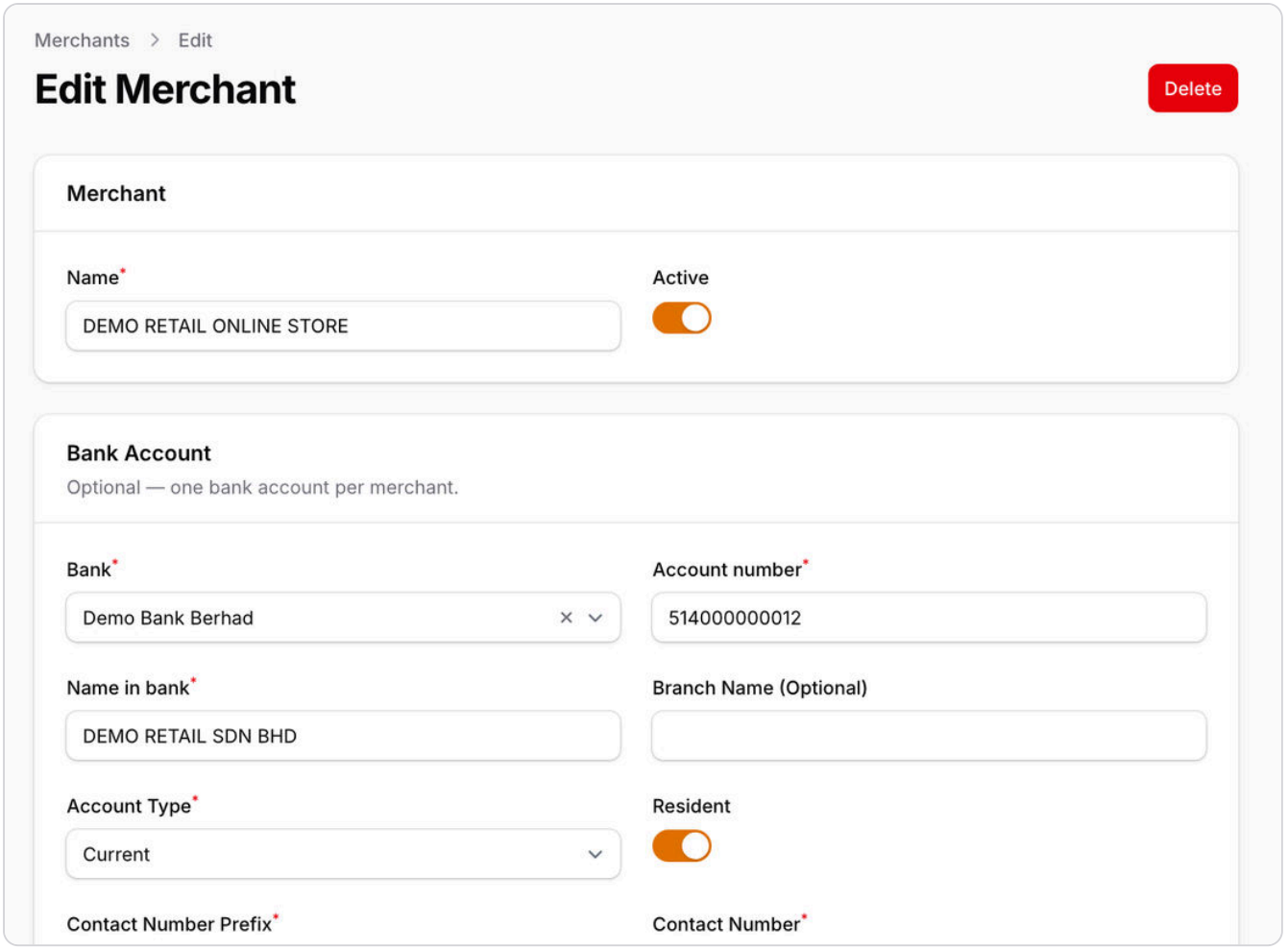
For: Administrators

Add a merchant for each business that should receive money, and give it the bank account its payouts go to.

1. Open **Merchants** under **Merchants and Terminals** in the menu. The list shows each merchant and how many terminals it has.



2. Press **New merchant**, or **Edit** on an existing one.
3. Under **Merchant**, type the **Name**. It is saved in capital letters. Switch off **Active** to stop using it.
4. Under **Bank Account**, pick the **Bank**, then type the **Account number**, the **Name in bank** exactly as the bank holds it, and the **Account Type**.
5. Type the **Contact Number Prefix** (60 for Malaysia) and **Contact Number**. The screen tells you when the contact number is required for the chosen bank.
6. Press **Save changes**.



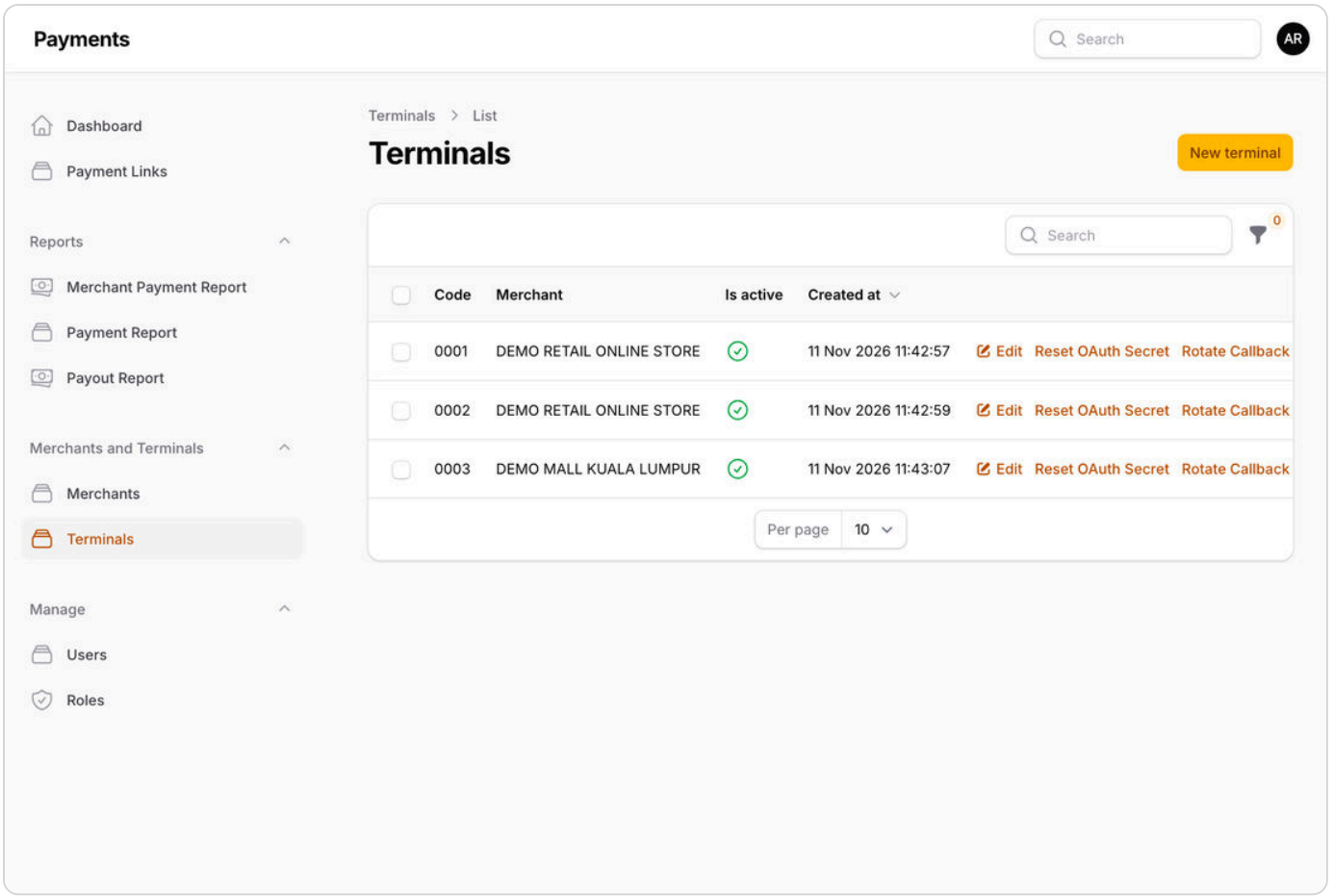
The bank account is optional, but a merchant without one cannot be paid out.

Connect another system

For: Administrators

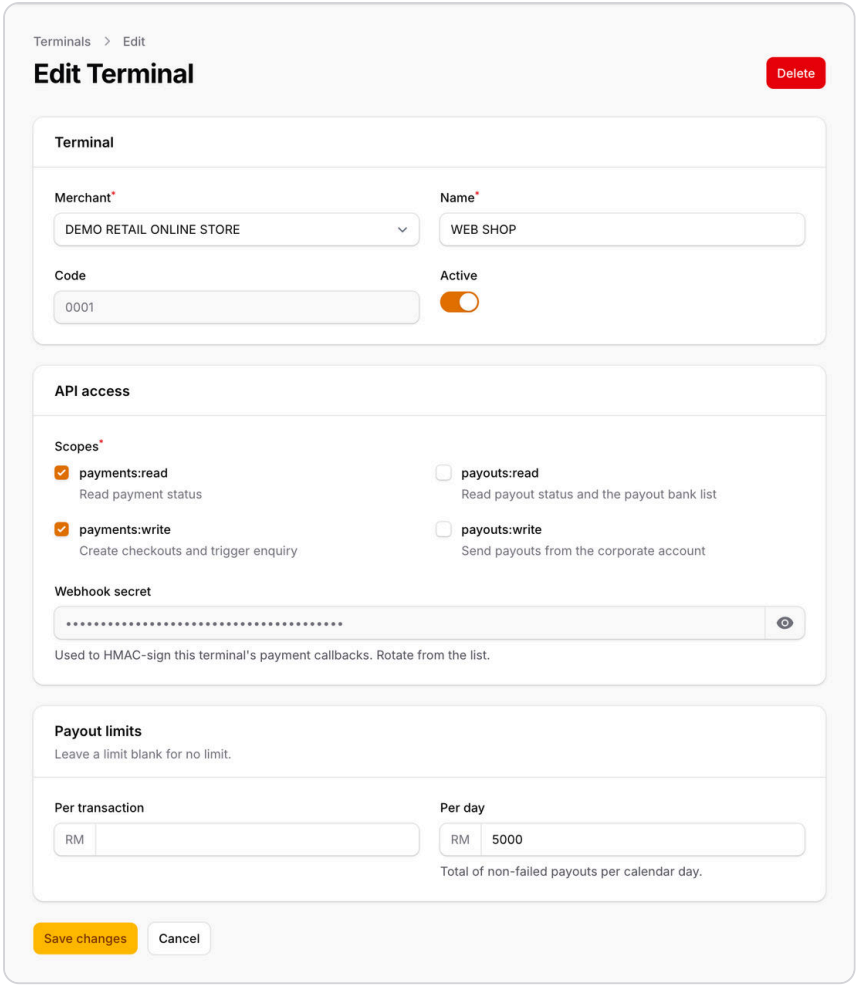
Each system that takes payments, such as the web shop or the membership app, needs its own terminal. The terminal gives that system a login, and decides what it is allowed to do.

1. Open **Terminals** under **Merchants and Terminals** in the menu.



2. Press **New terminal**.
3. Pick the **Merchant** that receives the money, and type a **Name**, for example WEB SHOP. The four-digit **Code** is given automatically after saving.
4. Under **API access**, tick what the system may do:
   - **payments:read** and **payments:write** to take payments and check them.
   - **payouts:read** and **payouts:write** only for a system that sends money out, for example refunds.
5. Under **Payout limits**, you can set the most it may pay out at once (**Per transaction**) and in one day (**Per day**). Leave a box empty for no limit.

6. Press **Create**.



After saving, a message shows the terminal's **Client ID** and secret. **The secret is shown only once.** Copy it straight away and give it to the person setting up the other system.

If a secret is lost or leaked

- **Reset OAuth Secret** makes a new login secret. The other system stops working until it is given the new one.
- **Rotate Callback** makes a new secret for the messages the Payment system sends back to that system.

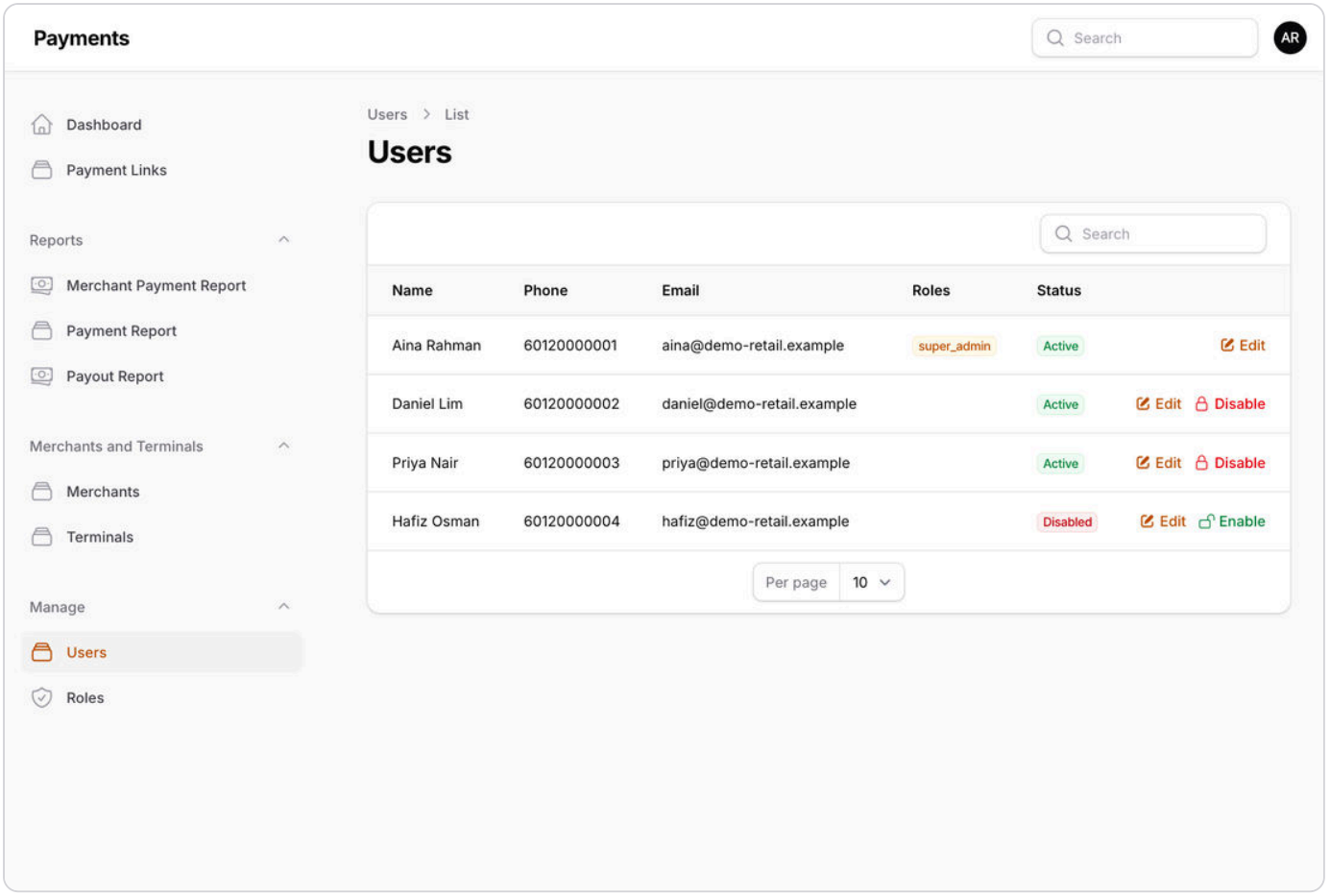
Switching off **Active** stops the terminal taking payments.

Give someone access

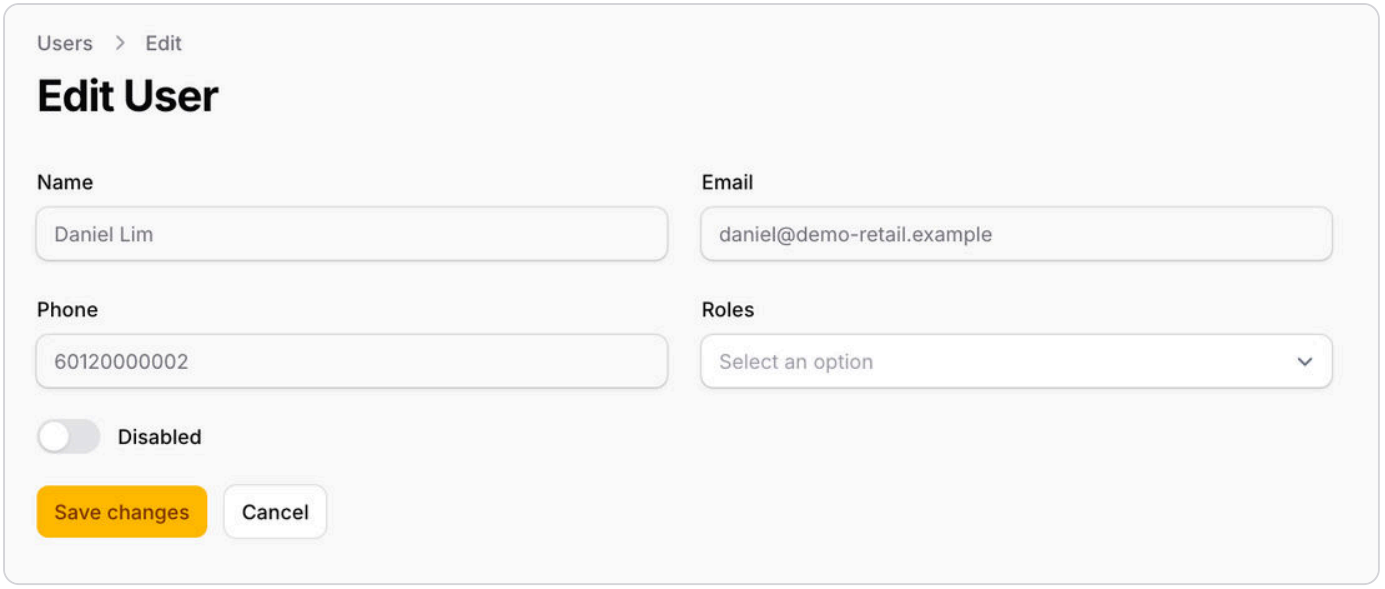
For: Administrators

People sign in with the company's shared sign-in. They appear in **Users** after their first sign-in, so there is no button to add someone.

1. Open **Users** under **Manage** in the menu.



2. Press **Edit** next to the person.
3. Pick one or more **Roles**. A role decides which menus and buttons the person sees.
4. Press **Save changes**.



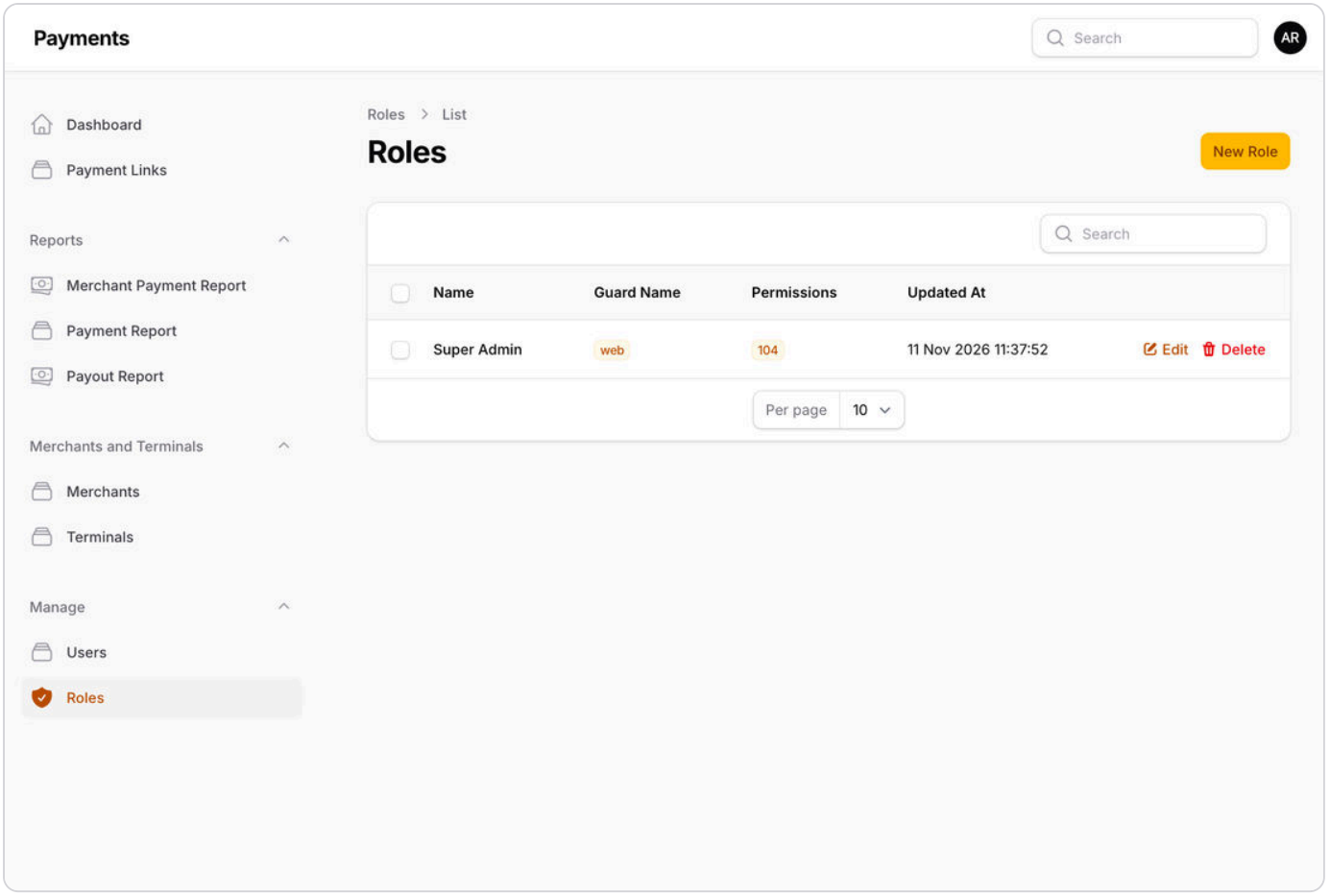
Stop someone using it

Press **Disable** in the list, or switch on **Disabled** on their page. They cannot open the Payment system until you press **Enable**. A person marked inactive in the shared sign-in is also kept out.

Make a new role

1. Open **Roles** under **Manage**. Only **Super Admin** exists at first, and it can do everything.
2. Press **New Role** and give it a **Name**, for example "Finance".
3. Under **Resources**, each screen has its own group of tick boxes. **View Any** lets the person open the list, **View** opens one record, **Create** and **Update** let them add and change. **Select all** ticks a whole group.
4. Press **Create**, then give the role to people as above.

Not on this screen yet: the buttons that move money or talk to the bank (**Submit Payout**, **Regenerate Payout**, **Enquire now**, **Re-send Callback**, **Cancel link**, **Mark Paid**, **Mark Failed**, **Reset OAuth Secret** and **Rotate Callback**) have no tick box here. Today only **Super Admin** can use them. Ask your system supplier if a finance role needs them.


Payments
Search
AR
Dashboard
Payment Links
Reports
Merchant Payment Report
Payment Report
Payout Report
Merchants and Terminals
Merchants
Terminals
Manage
Users
Roles
Roles > List
Roles
New Role
Search
Name
Guard Name
Permissions
Updated At
Super Admin
web
104
11 Nov 2026 11:37:52
Edit
Delete
Per page
10

USER GUIDE · VERSION 1

Closed-loop e-wallet

Customer stored value, plus staff incentive balances with controlled payout.

1. What the e-wallet is for
2. Sign in and find your way
3. Look up someone's balance
4. Approve or reject a staff withdrawal
5. Check a customer's top-up
6. Trace a money movement in the journal
7. Find a customer's vouchers
8. Set up vouchers and give them to customers
9. Choose how customers can top up
10. Manage merchants and who can see what

What the e-wallet is for

For: Everyone

The e-wallet holds money that belongs to people but stays inside your company. "Closed-loop" means the money can only be used with your company: a customer tops up their wallet and spends it at your company's outlets, and it cannot be sent to another shop or another person. It holds two kinds of balance. **Customer balances** come from customers topping up in your company's customer app, and customers also keep their shopping vouchers here. **Staff incentive balances** come from the Staff incentive module, which works out what each person earned; staff then ask for that money to be paid into their bank account, and your finance team approves each request before it is paid.

Who uses it

- **Customers** top up, check their balance and use vouchers in the customer app. They never see the screens in this guide.
- **Staff** see their incentive balance and ask for a withdrawal in the Staff incentive app, not here.
- **Your finance team and administrators** use the wallet's admin screens, described in the rest of this guide: approving withdrawals, checking top-ups, looking up balances, and setting up vouchers and top-up options.

The admin screens have one built-in role, **Sysdev**, which can do everything. An administrator can add more roles under **Roles** (see the last page).

What it needs from other modules

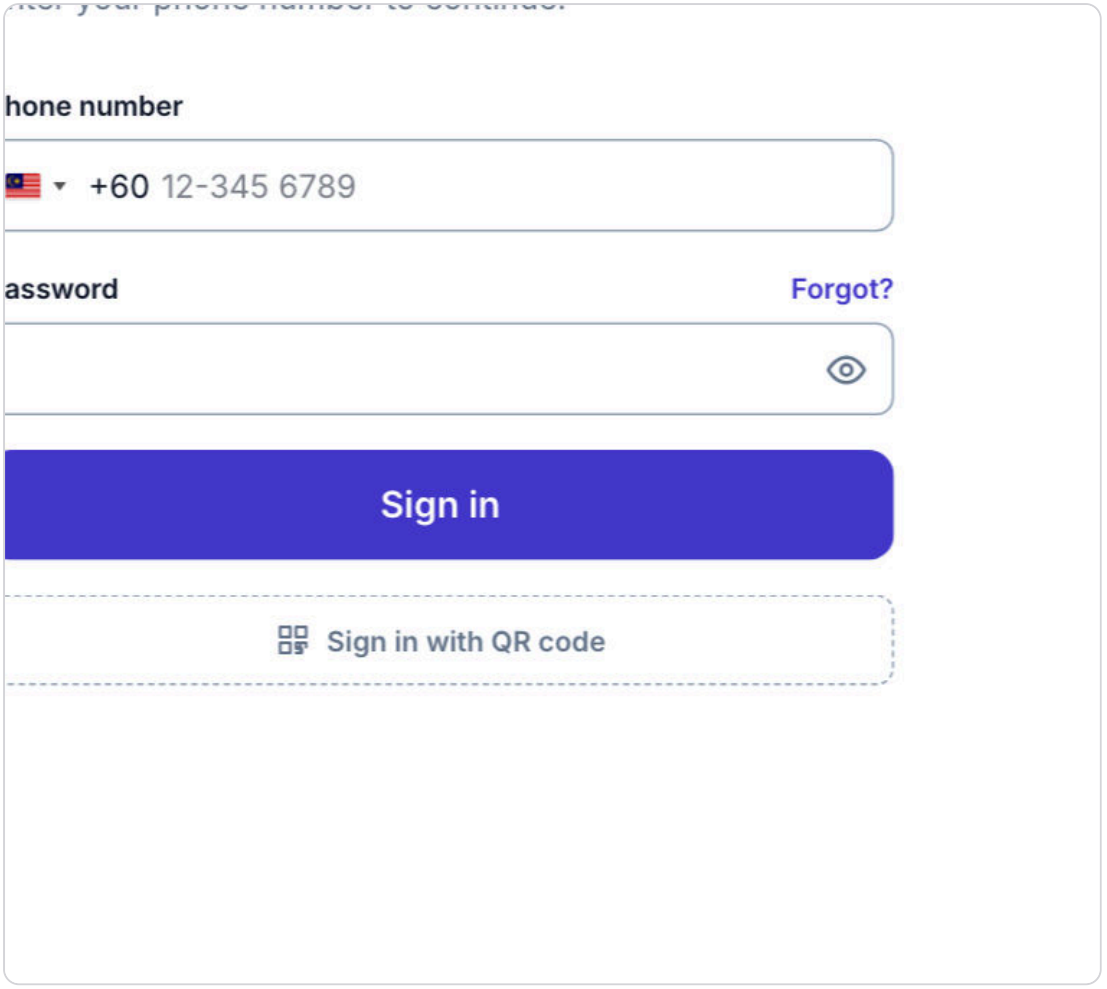
- **People's names** come from the app that opened each wallet. The wallet itself keeps only a phone number (staff) or a long sign-in code (customers), plus the name that app sent.
- **What staff earned** comes from the Staff incentive module. The wallet does not decide incentives.
- **Top-ups** go through your company's payment provider (shown on screen as UPG). The wallet never takes card or bank details itself.
- **Payouts to staff** go through your company's bank link, which your IT team sets up.

- **Using a voucher** is done by the customer app or the till talking to the wallet. There is no screen for it here.
- **Paying at an outlet from the customer's balance itself does not work yet.** This version of the wallet can take top-ups and hold the balance, but has no way for a till or the app to spend it. Ask your IT team when that is planned.

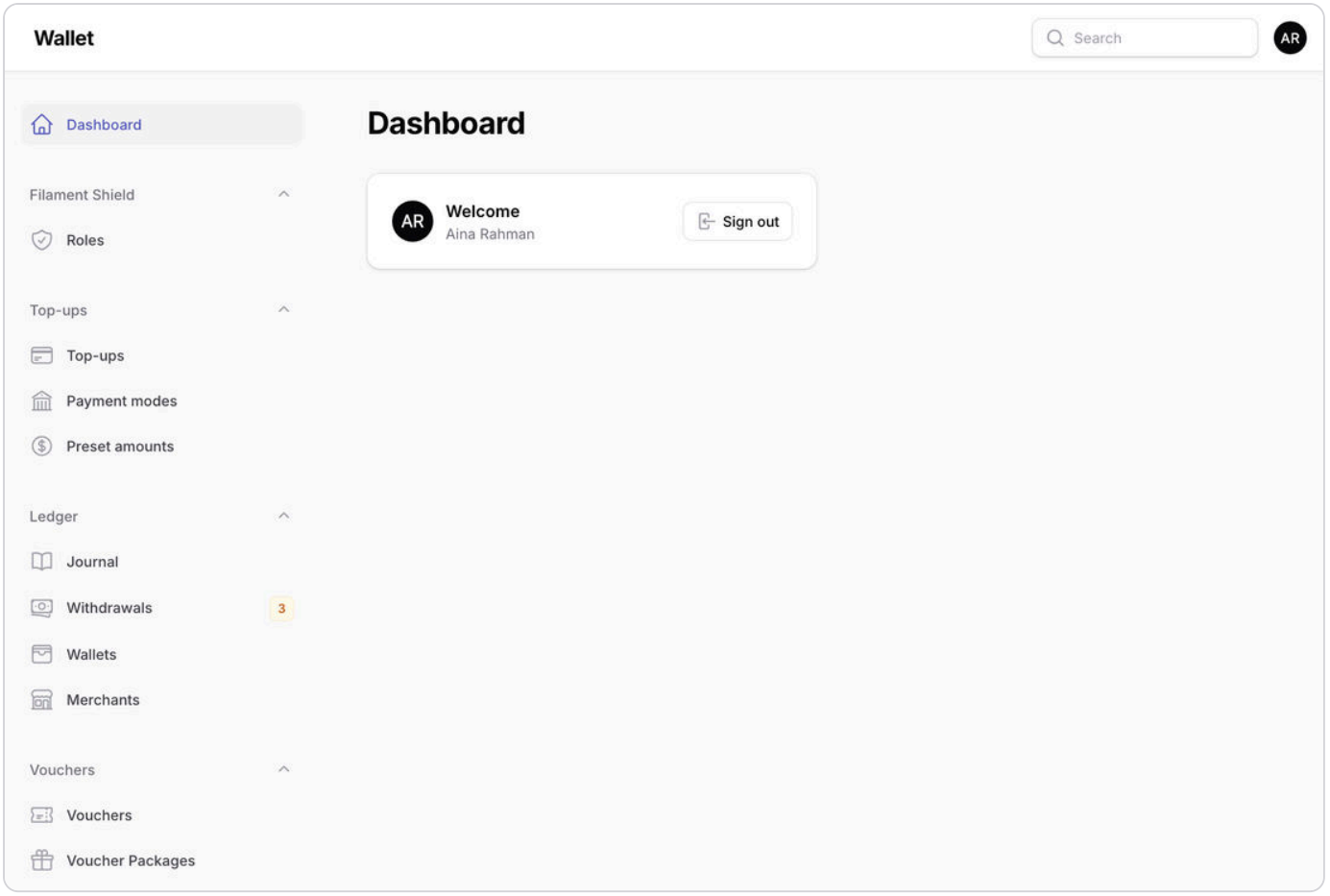
Sign in and find your way

For: Finance team and administrators

1. Open the wallet's web address that your IT team gave you. If your company uses the Portal, you can also open it from there.
2. On the **Sign in** page, type your **Phone number** and **Password**, then press **Sign in**. You can also press **Sign in with QR code** and scan the code with your phone.



3. You land on the **Dashboard**. The menu on the left holds everything:
    - **Top-ups**: customer top-ups, the **Payment modes** customers can pay with, and the **Preset amounts** the app offers.
    - **Ledger**: the **Journal** of every money movement, **Withdrawals** waiting for a decision, every **Wallet** and its balance, and the **Merchants** (the apps that use the wallet).
    - **Vouchers**: issued **Vouchers**, **Voucher Packages**, **Voucher Setups** and **Voucher Types**.
    - **Filament Shield**: **Roles**, which decide who can see the voucher screens.



The orange number next to **Withdrawals** is how many staff withdrawals are waiting for someone to approve or reject them.

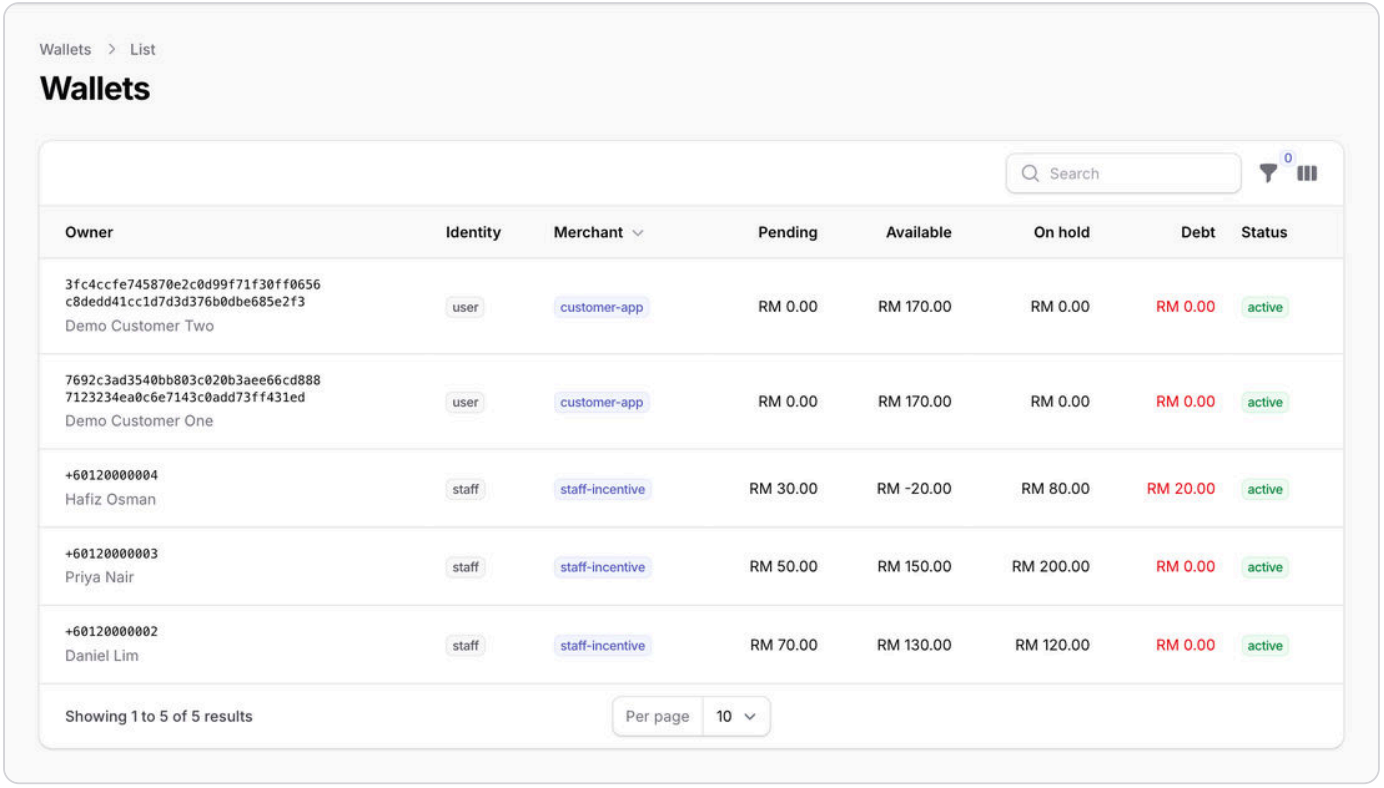
To leave, press **Sign out** on the Dashboard, or press your initials at the top right.

Look up someone's balance

For: Finance team and administrators

Use this when a customer or a staff member asks "how much do I have?" or "where is my money?".

1. Open **Wallets** in the menu, under **Ledger**.
2. Type the staff member's phone number into **Search**, for example 60120000002. Search does not look at names, so for a customer, scroll or filter until you see their name under the code. To see only one app's wallets, press the funnel button and pick a **Merchant**.



What the columns mean

- **Owner**: the staff member's phone number, or a long code for a customer, with their name underneath.
- **Identity**: **user** is a customer, **staff** is a staff member.
- **Merchant**: which app the wallet belongs to.
- **Pending**: staff incentive money that has been earned but is not ready to withdraw yet. Customer wallets show RM 0.00 here, because a top-up goes straight to Available.

- **Available**: money the person can use or withdraw now.
- **On hold**: money set aside for a withdrawal that has not been paid yet. It comes back to Available if the withdrawal is rejected or the bank sends it back.
- **Debt**: money the person owes. This happens when incentive money is taken back (for example, a sale was returned) after it was already paid out. Available can then show a minus figure, as in the Hafiz Osman row above. While someone has a debt they cannot withdraw, and their next earnings pay it off first.
- **Status**: **active**, or **locked** or **suspended** when the wallet has been stopped.

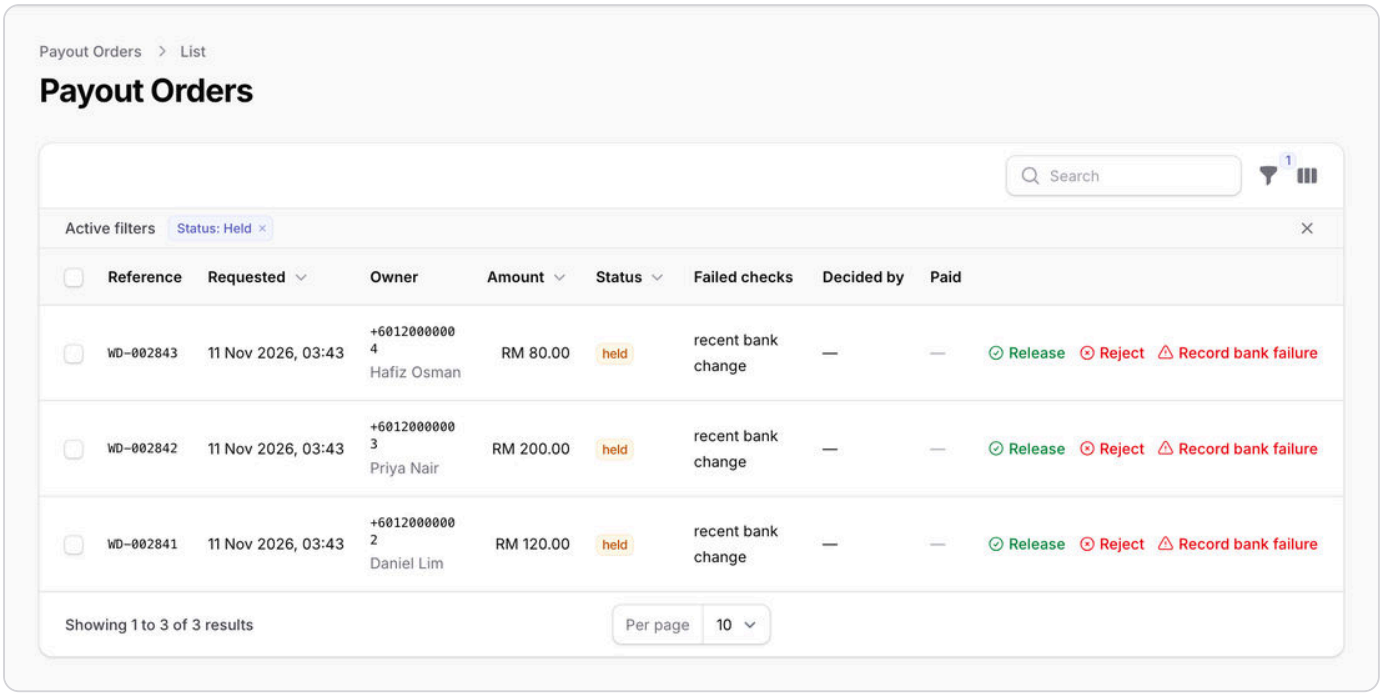
This screen only shows balances. You cannot change a balance here. Corrections are made by the app that owns the wallet, and each one is recorded in the **Journal** with a reason.

Approve or reject a staff withdrawal

For: Finance team and administrators

When a staff member asks for their incentive money in the Staff incentive app, the request comes here. Out of the box, no request is paid until a person approves it, whatever the amount.

1. Open **Withdrawals** in the menu, under **Ledger**. The page is headed **Payout Orders**, and it opens showing only the requests that are waiting (**Status: Held**).
2. Read each row: who asked (**Owner**), the **Amount**, and **Failed checks**.



Failed checks lists anything the system found worth a second look. It does not block the request; it is there to help you decide:

- **recent bank change**: the bank account was added or changed in the last 30 days.
- **repeat withdrawal**: the person already asked for a withdrawal in the last 24 hours.
- **auto release ceiling**: the amount is above the limit that could ever be paid without a person.
- **earnings spike**: recent earnings are much higher than this person's usual.
- **fraud review**: the Staff incentive module says an earning is being checked for fraud.
- **recoverable debit**: the person owes money (see **Debt** on the Wallets page).

To approve

3. Press **Release** on the row.
4. Type why in **Why is this being released?** (for example "Checked against the monthly incentive list") and press **Submit**. The reason is kept with the withdrawal for good.

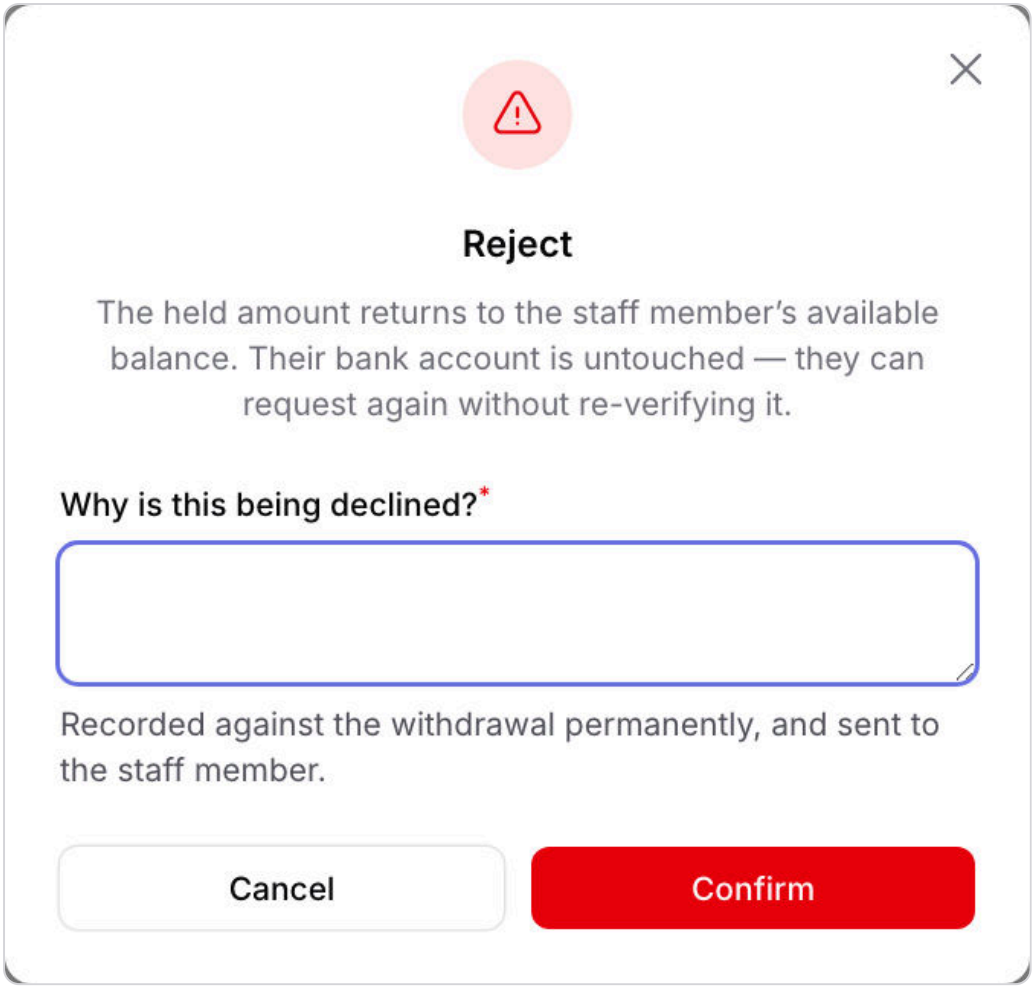


The payment then goes to the bank through your company's bank link. Its status moves to **released**, then **submitted**, then **paid** when the bank confirms. How quickly depends on how your IT team set up the bank link.

To approve many at once, tick the boxes on the left of the rows, then press **Release selected**. You type one reason, and it is recorded against each withdrawal. Any request that can no longer be released is left alone and listed in a message.

To reject

3. Press **Reject** on the row.
4. Type why in **Why is this being declined?** and press **Confirm**. The reason is kept with the withdrawal and sent to the staff member.



The money goes back to the person's **Available** balance. Their bank account stays approved, so they can ask again straight away.

When the bank sends a payment back

Use **Record bank failure** only when the bank returned or refused a payment, not to turn a request down. Type what the bank said and confirm. The money goes back to the person's **Available** balance, and their bank account has to be checked again before the next withdrawal.

To see older requests, press the funnel button and change **Status** (for example to **Paid** or **Rejected**). **Decided by** shows who released or rejected each one.

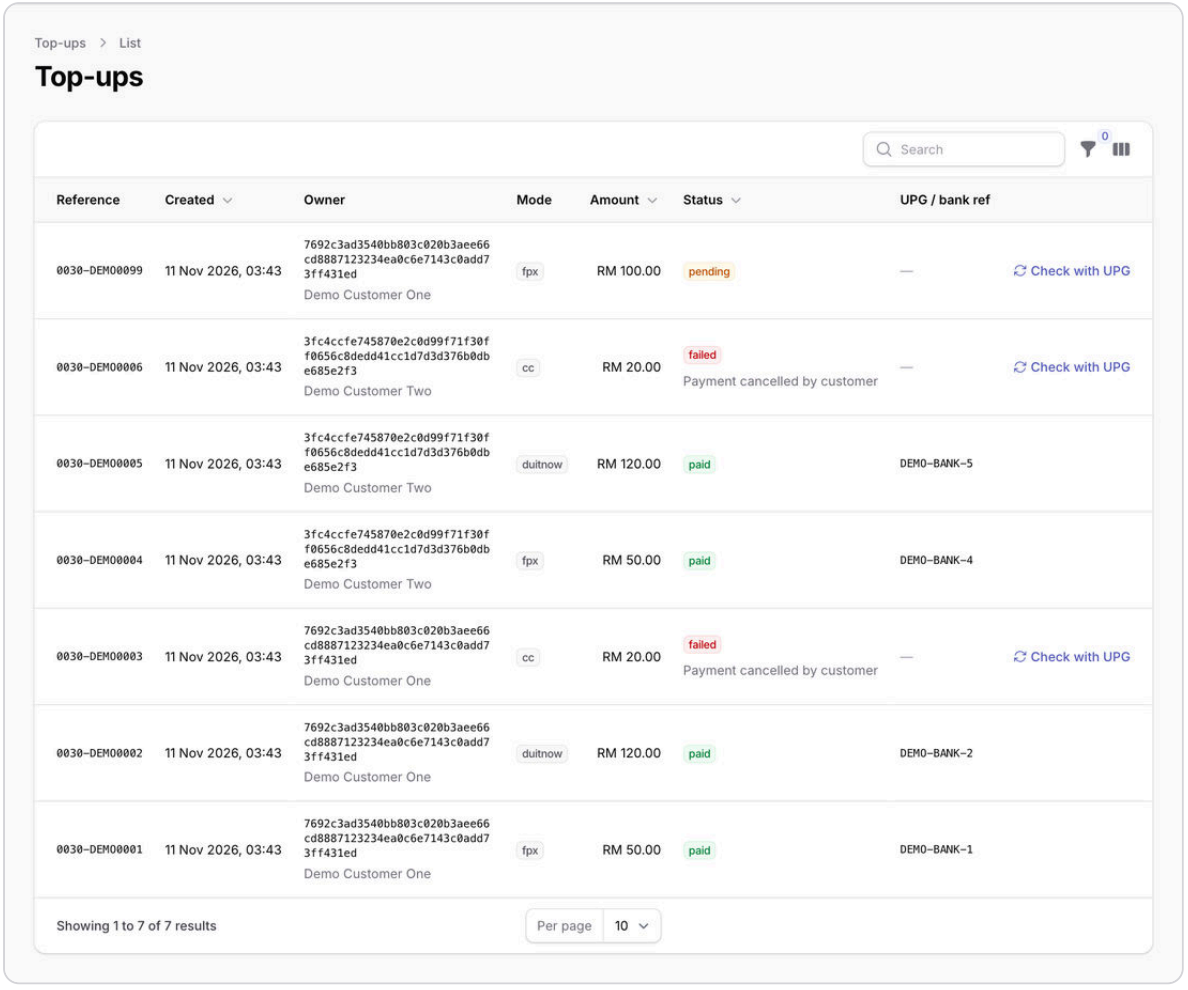
Check a customer's top-up

For: Finance team and administrators

Customers top up in the customer app: they choose an amount and a payment mode, and the app sends them to your company's payment provider (UPG) to pay. That payment step happens on the provider's own page, not in the wallet. When the provider confirms the payment, the money appears in the customer's **Available** balance straight away.

Use this screen when a customer says "I paid but my balance did not change".

1. Open **Top-ups** in the menu, under **Top-ups**.
2. Type the reference the customer quotes into **Search** (it starts with 0030-). Search does not look at names.



3. Read the **Status**:
    - **paid**: the money is in the customer's balance. **UPG / bank ref** is the provider's reference, if the customer needs to quote it to their bank.

- **pending**: the customer started paying but the provider has not confirmed yet.
- **failed**: the payment did not go through. The reason is shown under the status.
- **expired**: nobody finished paying in time.

4. For a **pending** or **failed** top-up, press **Check with UPG**. The wallet asks the payment provider for the latest answer. If the provider says it was paid, the money is added to the balance then. A message tells you the result.

The wallet also checks unfinished top-ups with the provider by itself every five minutes.

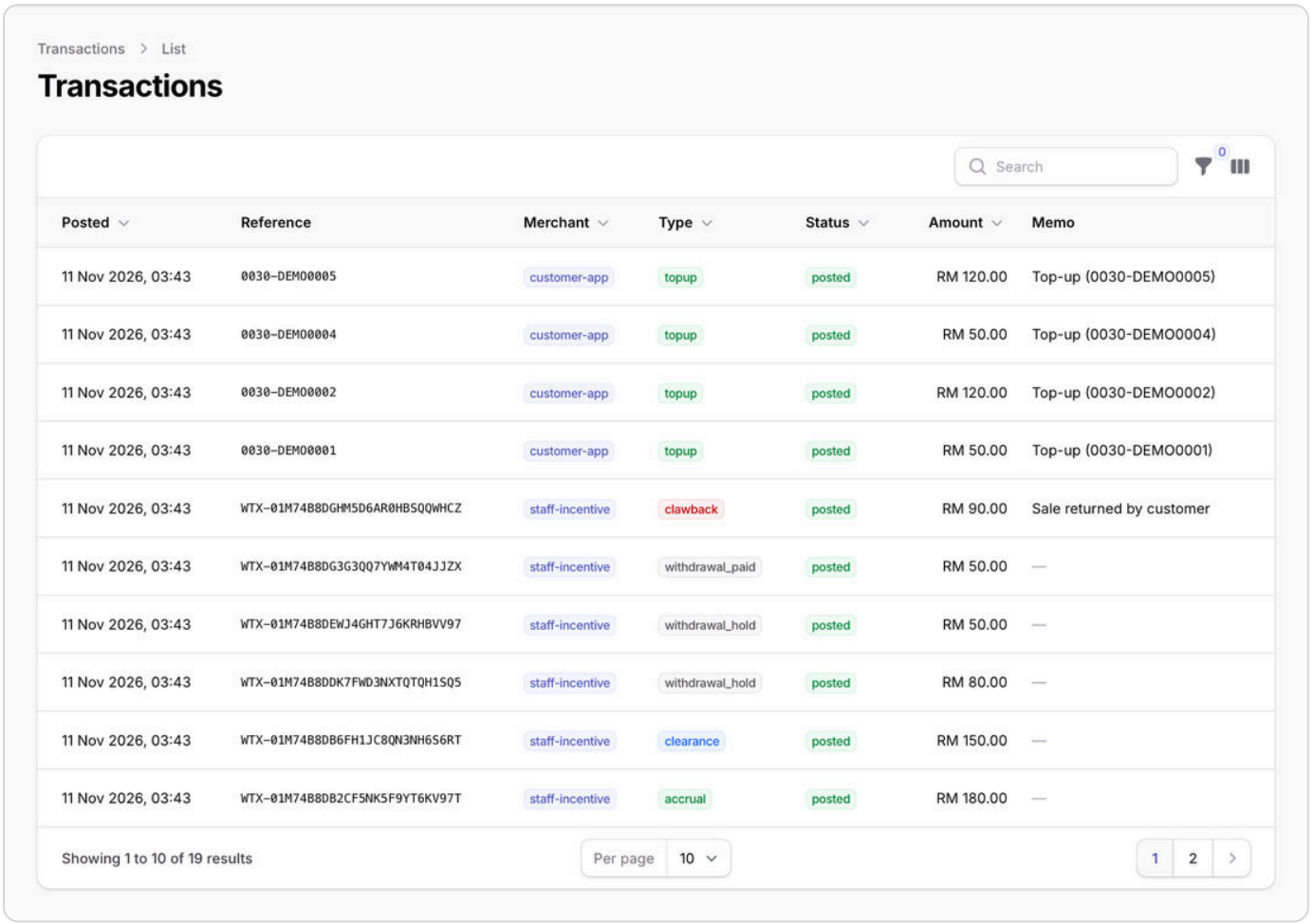
You cannot add money to a customer's balance from this screen. A top-up only counts once the payment provider confirms it.

Trace a money movement in the journal

For: Finance team and administrators

The **Journal** lists every movement of money in the wallet, newest first. Nothing in it can be edited or deleted: a mistake is fixed by adding a new movement that undoes it, so you can always see both.

1. Open **Journal** in the menu, under **Ledger**. The page is headed **Transactions**.
2. Search for a reference, or press the funnel button to filter by **Type**, **Status** or **Merchant**.



What the types mean

- **accrual**: a staff member earned incentive money. It starts in **Pending**.
- **clearance**: earned money became ready to withdraw (moved from Pending to Available).
- **clawback**: earned money was taken back, for example because a sale was returned. The **Memo** says why.

- **debit_recovery**: new earnings paid off money the person owed.
- **withdrawal_hold**: money set aside when a staff member asked for a withdrawal.
- **withdrawal_paid**: a withdrawal was paid to the bank.
- **withdrawal_returned**: a withdrawal came back (rejected, or refused by the bank) and the money went back to Available.
- **reversal**, **manual_adjustment**, **forfeiture**: corrections made by a person, each with a recorded reason. A forfeiture writes off the unclaimed balance of someone who has left.
- **topup**: a customer top-up that was paid.

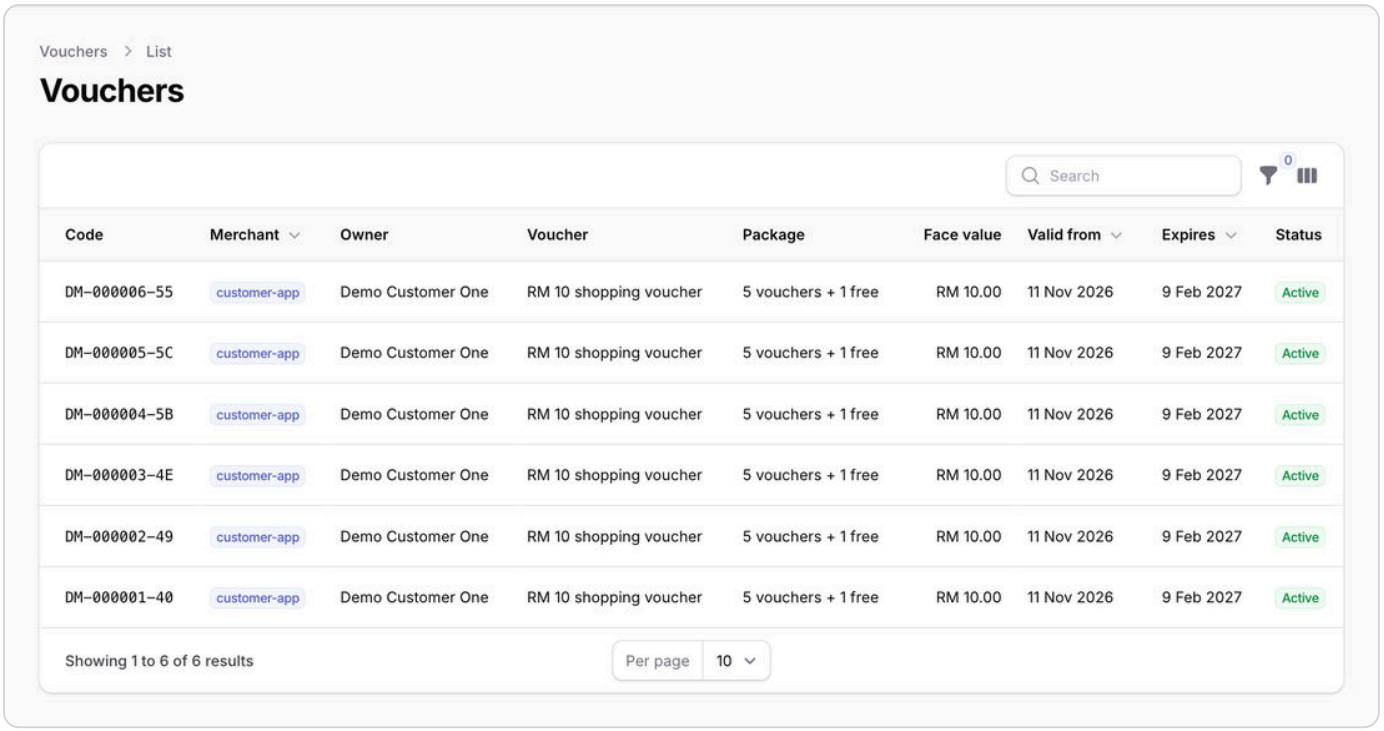
Corrections are made by the app that owns the wallet. There is no button for them on this screen.

Find a customer's vouchers

For: Finance team and administrators

Use this when a customer asks about a voucher: whether they have it, whether it is still valid, or whether it was used.

1. Open **Vouchers** in the menu, under **Vouchers**.
2. Type the voucher code into **Search**. You can type it with or without the dashes. Search also finds the voucher name, the package name and the reference typed when the vouchers were given out, but not the customer's name.



3. Check the row:
    - **Face value**: what the voucher is worth.
    - **Valid from** and **Expires**: the dates it can be used between.
    - **Status**: **Active** can still be used, **Redeemed** has been used, **Cancelled** has been cancelled.
    - **Package**: the bundle it came in. If **Owner** has "from" under it, someone else gave the voucher to this customer.

Press the columns button at the top right of the list to show more, such as **Paid** (what the customer paid for that voucher), **Free** and **Issued**.

Customers use their vouchers in the customer app or at the till. You cannot mark a voucher as used or cancelled from this screen.

You need a role with permission to see vouchers. If **Vouchers** is missing from your menu, ask an administrator.

Set up vouchers and give them to customers

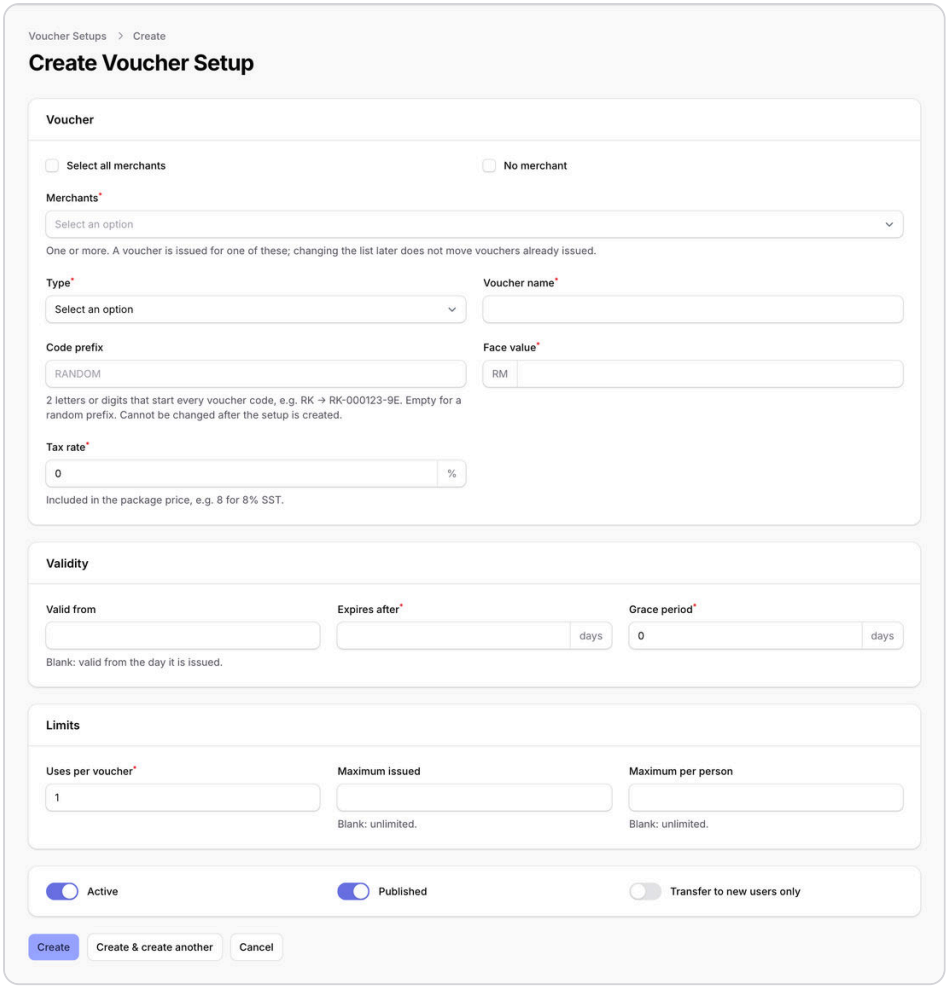
For: Administrators

Vouchers are built in three layers:

- A **voucher type** is the kind of voucher, such as **Cash Voucher** or **Percentage Discount**. Five types come built in.
- A **voucher setup** is one voucher design: its name, value and how long it lasts.
- A **voucher package** is what a customer buys or is given, for example "5 vouchers + 1 free" of one setup, at a price.

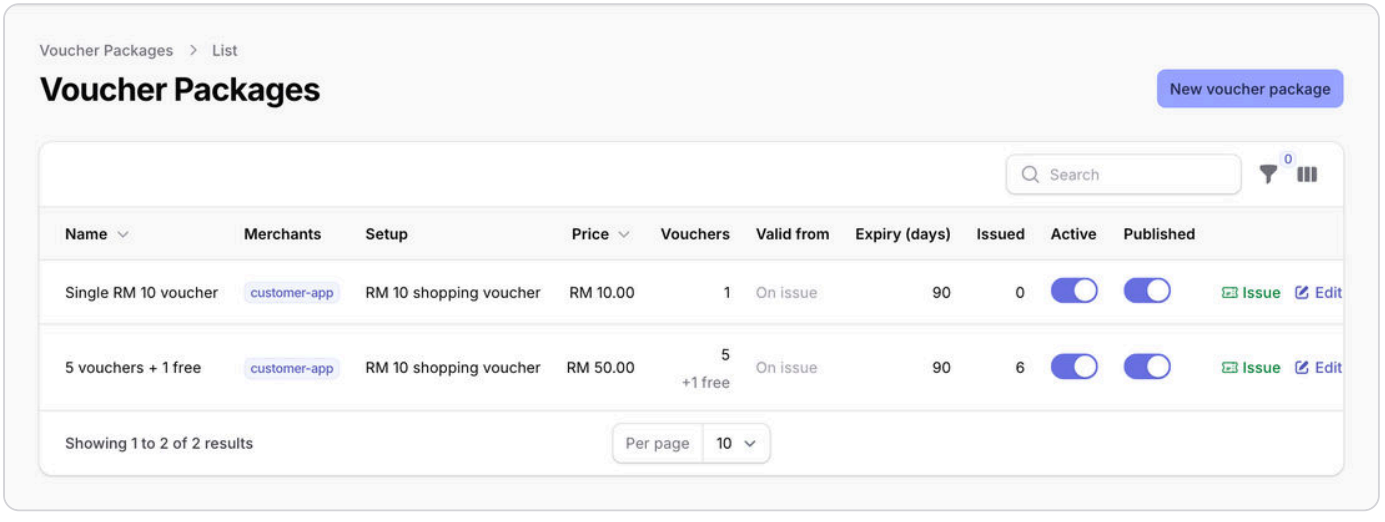
Make a voucher setup

1. Open **Voucher Setups** in the menu and press **New voucher setup**.
2. Under **Voucher**, pick the **Merchants** (apps) it can be used through, or tick **Select all merchants**. Pick a **Type** and type a **Voucher name**.
3. Fill in **Face value** (what one voucher is worth) and **Tax rate** (0 if none). **Code prefix** is optional: two letters or digits that start every code, for example DM gives codes like DM-000001-40. You cannot change the prefix or the type later.
4. Under **Validity**, fill in **Expires after** (days). Leave **Valid from** empty to start on the day each voucher is given out.
5. Under **Limits**, set **Uses per voucher**, and if you want a cap, **Maximum issued** and **Maximum per person**. Empty means no limit.
6. Leave **Active** and **Published** on, then press **Create**.



Make a package

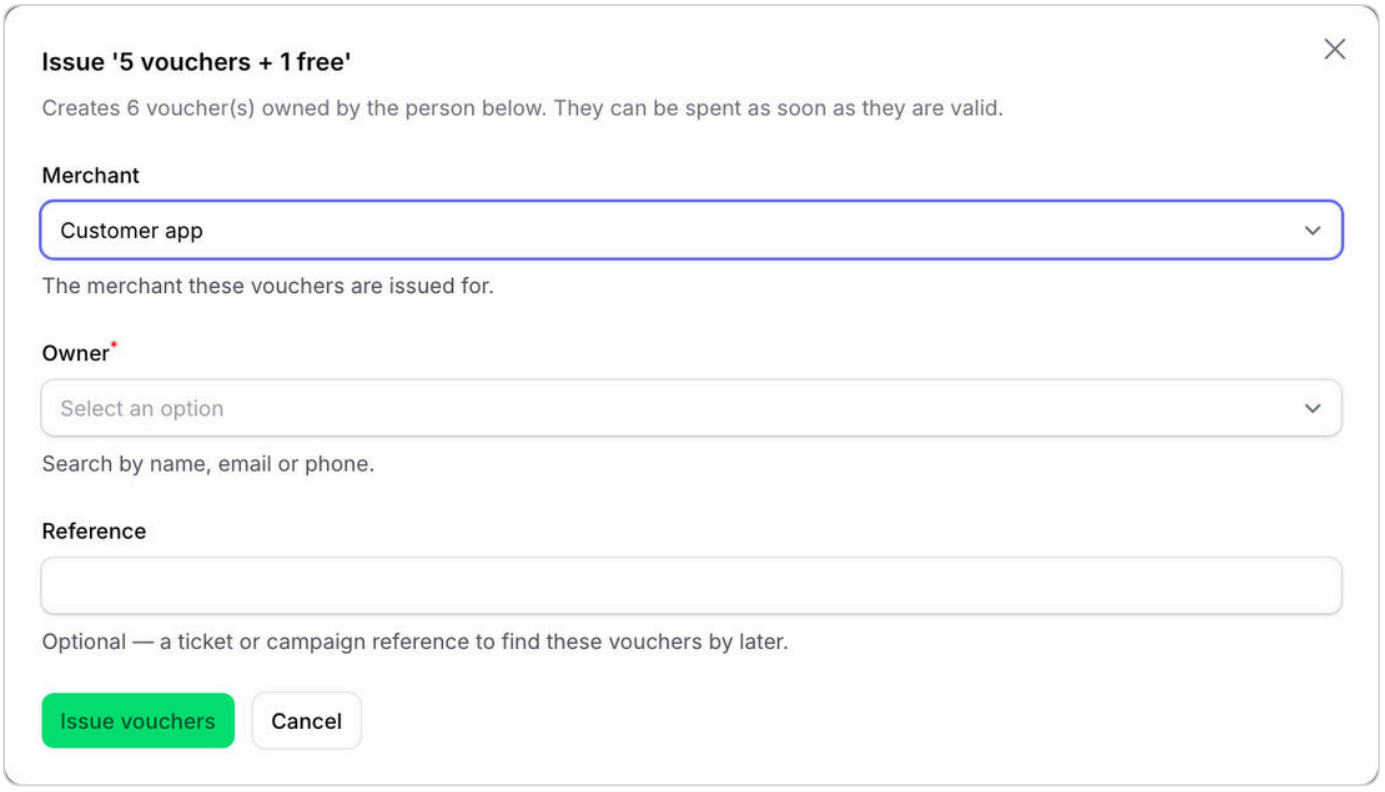
7. Open **Voucher Packages** and press **New voucher package**.
8. Pick the **Voucher setup**, type a **Package name**, the number of **Vouchers**, any **Free vouchers**, and the **Price** (including tax). The validity is copied from the setup; change it here if this package is different. Press **Create**.



Give a package to a customer

Use this for goodwill, a campaign, or to fix a problem, when the customer is not paying.

9. On **Voucher Packages**, press **Issue** on the package. You need a role that is allowed to issue vouchers.
10. Check the **Merchant**, then in **Owner** search for the customer by name, email or phone. Optionally type a **Reference** such as a campaign name, so you can find these vouchers later.
11. Press **Issue vouchers**. The customer gets every voucher in the package, free ones included, and can use them as soon as they are valid.



Only customers who have already signed in to the customer app at least once can be found in **Owner**.

To stop a package being sold or given, open it with **Edit** and switch off **Active**. **Published** controls whether the customer app shows it.

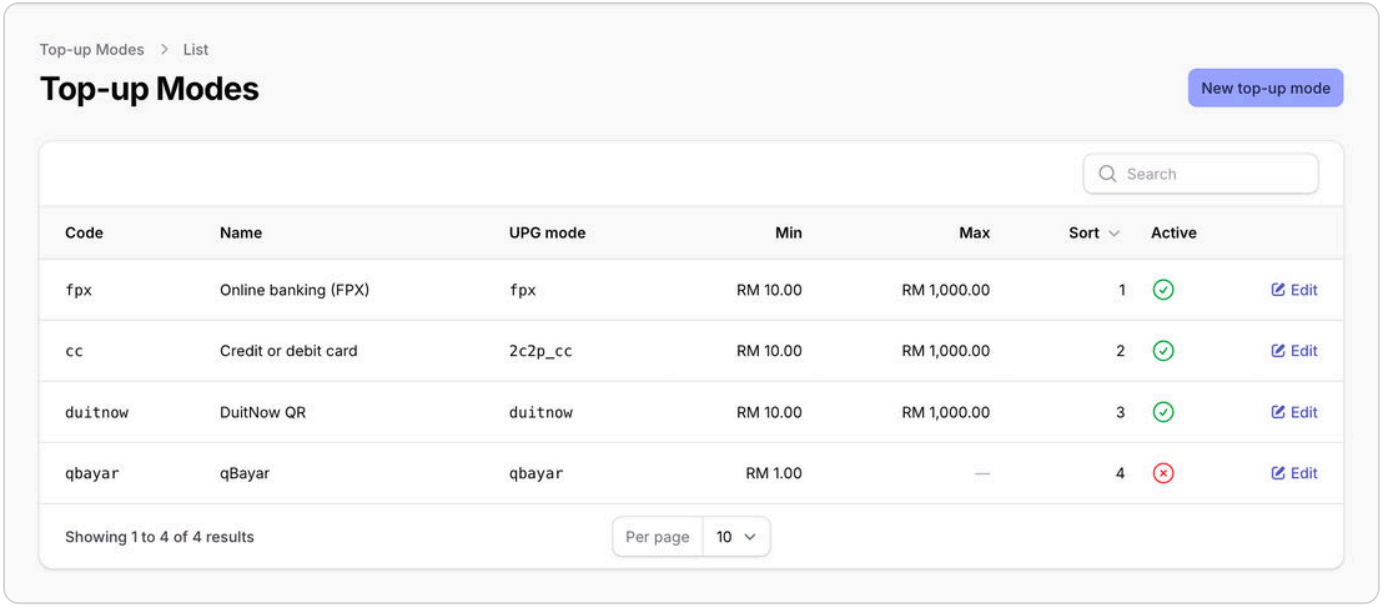
Choose how customers can top up

For: Administrators

These two screens decide what the customer app offers when a customer tops up.

Payment modes

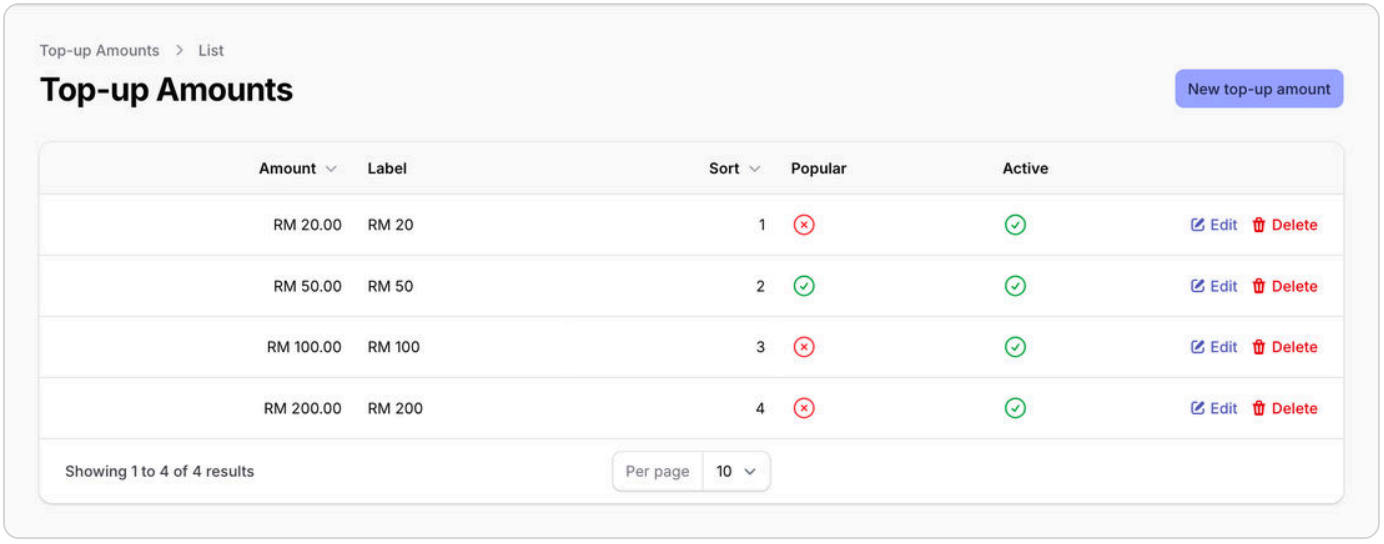
1. Open **Payment modes** in the menu, under **Top-ups**. The page is headed **Top-up Modes**.
2. Press **Edit** on a mode to change it, or **New top-up mode** to add one.



- **Name** is what customers see, for example "Online banking (FPX)".
- **Minimum** and **Maximum** are the smallest and largest top-up allowed with that mode. Leave **Maximum** empty for no limit.
- **Sort** sets the order in the app, lowest first.
- Switch off **Active** to hide a mode without deleting it.
- **Code** and **UPG payment mode** must match what the customer app and the payment provider expect. Ask your IT team before changing them; a wrong value stops that payment mode working.

Preset amounts

3. Open **Preset amounts** in the menu. The page is headed **Top-up Amounts**.
4. Press **New top-up amount** to add a quick-pick amount, or **Edit** or **Delete** on an existing one.



- **Label** is shown instead of the amount if you fill it in, for example "RM 50".
- **Popular** highlights the amount in the app.
- Switch off **Active** to hide an amount for now.

Customers can still type their own amount between the payment mode's minimum and maximum.

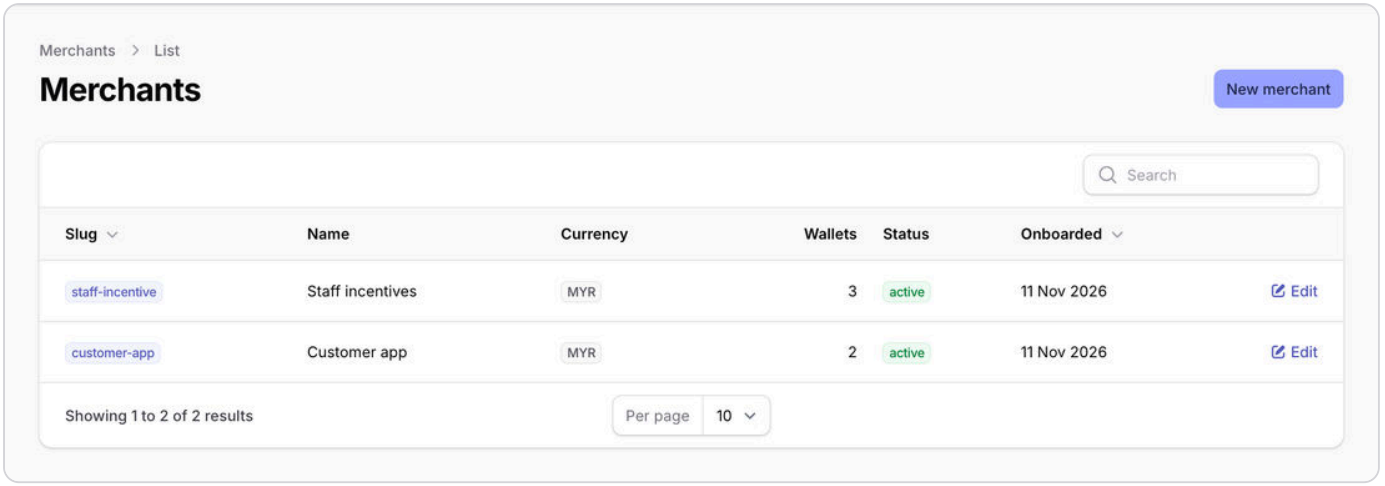
Manage merchants and who can see what

For: Administrators

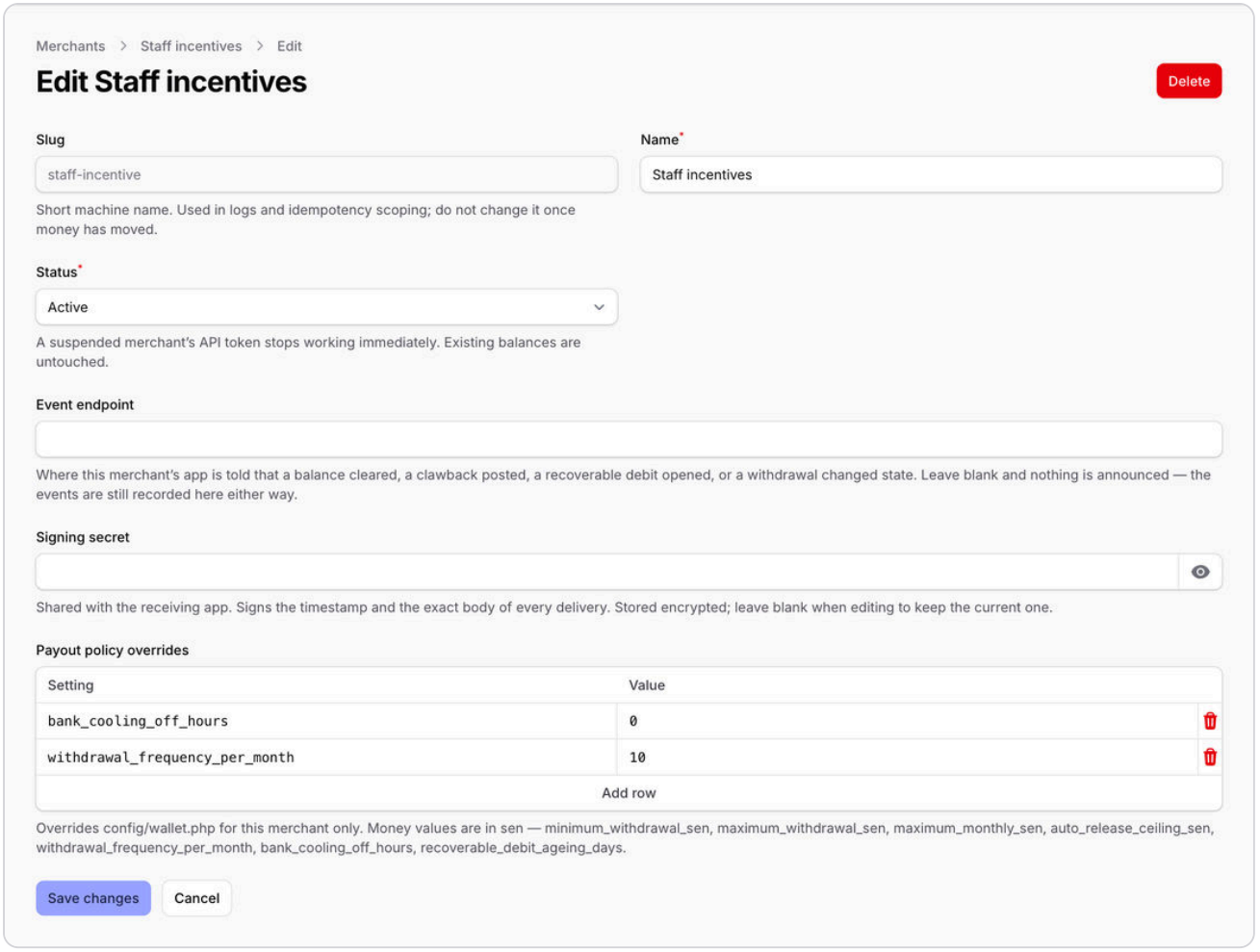
Merchants

A merchant here is one of your company's apps that keeps money in the wallet, for example the customer app and the Staff incentive module. Each app can only see and move its own wallets.

1. Open **Merchants** in the menu, under **Ledger**.



2. Press **Edit** on a merchant to change it.



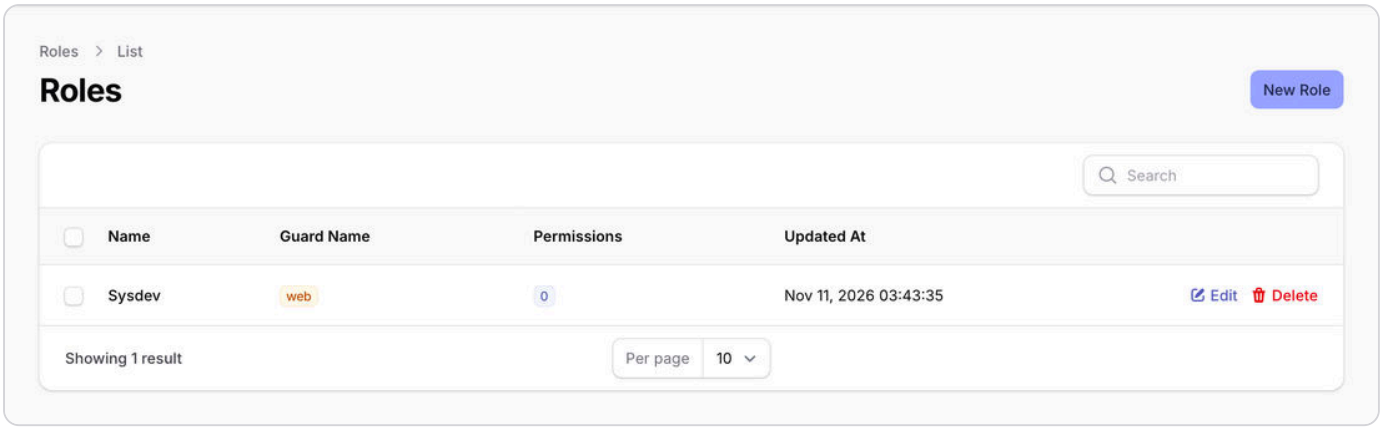
- **Status**: choose **Suspended** to stop that app using the wallet at once, for example if its password may have leaked. Balances stay as they are.
- **Event endpoint** and **Signing secret**: where the wallet tells the app that something happened (a balance cleared, a withdrawal changed). Your IT team fills these in.
- **Payout policy overrides**: change the withdrawal rules for this app's staff only. Press **Add row**, type the setting name exactly as listed under the box, and its value. Money is typed in sen (RM 1 = 100 sen), so RM 50 is 5000. Out of the box the rules are:
    - smallest withdrawal RM 50 (`minimum_withdrawal_sen`)
    - largest withdrawal RM 5,000 (`maximum_withdrawal_sen`), and RM 10,000 a month (`maximum_monthly_sen`)
    - 4 withdrawals a month (`withdrawal_frequency_per_month`)
    - no withdrawal until 24 hours after a bank account is added or changed (`bank_cooling_off_hours`)
    - a debt older than 90 days is flagged to Finance and HR (`recoverable_debit_ageing_days`)

Press **Save changes** when done.

A new app's sign-in details are not made on this screen. Your IT team creates them, and the secret is shown to them once.

Roles

1. Open **Roles** in the menu, under **Filament Shield**.
2. Press **New Role**, type a **Name** (for example "Finance"), tick what the role may do, and save. Then your IT team gives the role to people.



Sysdev is the built-in role that can do everything.

Today, the ticks in a role only change the voucher screens (**Vouchers**, **Voucher Packages**, **Voucher Setups** and **Voucher Types**). Every other screen, including **Withdrawals**, **Wallets**, **Merchants** and **Roles**, opens for anyone who can sign in to the wallet admin screens, whatever their role. So only give a wallet sign-in to people who should see money.

USER GUIDE · VERSION 1

Customer service

One place to answer customers from WhatsApp, email, the web form and live chat, with AI-drafted replies that a person approves, and follow-up of unhappy customers at each outlet.

1. What it is for
2. Sign in and say whether you are free
3. Find your tickets
4. Reply to a customer
5. Open a ticket yourself
6. Take live chats
7. Approve AI replies
8. Answer WhatsApp calls
9. Act on customer feedback at your outlet
10. Check what an outlet did
11. Watch for feedback that is stuck
12. Keep customer details right
13. Write help articles
14. Read the reports
15. What customers see
16. Change how the system works
17. Give people access
18. Set up automatic rules, extra fields and links

What it is for

For: Everyone

Customer service collects every customer conversation in one place. Messages arrive from WhatsApp (messages and voice calls), email, the web form on your website and live chat. Each conversation becomes a ticket. An AI (a computer program that reads and writes text) drafts a reply from your company's approved help articles, and a person stays in charge of what reaches the customer. Unhappy customers from **Customer feedback** also arrive here, and are passed to the outlet to put right.



Who uses it

Role	What they typically do
Agent	Answers the tickets given to them, takes live chats and calls, approves AI replies.
Supervisor	Everything an agent does, plus sees every ticket, moves work between people, reads reports, and watches feedback that is stuck.

Role	What they typically do
CS Manager	Everything a supervisor does, plus help articles, automatic rules, ticket types and extra fields.
Admin	Everything, including settings, channels, people and roles.
Outlet Manager	Sees only **My Feedback Tickets**: unhappy customers at their outlet, and records what was done.
Area Manager	Checks what an outlet did and closes the ticket, or sends it back.

An Admin can change what each role includes under **Roles & permissions**, so yours may differ. You only see the menu items your role allows.

What it needs from other modules

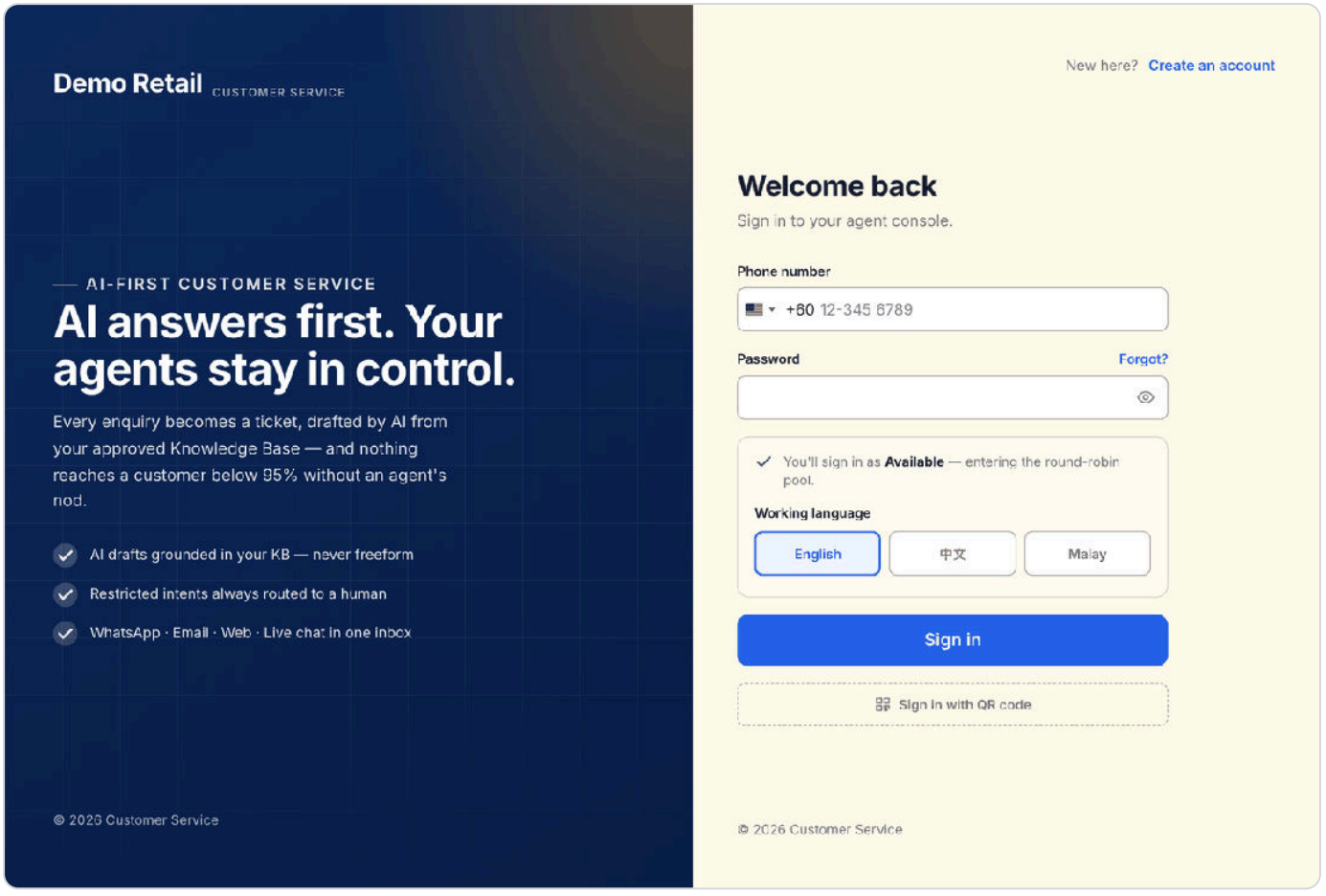
- **Customer feedback** sends unhappy survey customers here as tickets.
- Outlets, and who manages each one, come from your company's records in the Portal.
- **Outlet audit** receives audit requests from here, once the link between the two is switched on.

CUSTOMER SERVICE

Sign in and say whether you are free

For: Everyone

1. Open the sign-in page and type the **Phone number** and **Password** your administrator gave you. You can also press **Sign in with QR code** and scan it from a phone that is already signed in.
2. Pick your **Working language**: English, Chinese or Malay. Customer messages are translated into it, with the original kept underneath.
3. Press **Sign in**.



Signing in marks you **Available**, so new tickets and chats can be given to you. Forgot your password? Press **Forgot?** on the sign-in page, or ask an administrator.

Say whether you are free

Your status is at the bottom of the menu on the left, under your name. Choose **Available**, **Away** or **Offline**. New work only goes to people who are **Available**, so set **Away** before a break.

If your team takes WhatsApp calls, the **Off duty** / **On duty** switch at the top of the menu decides whether calls can ring you. It is separate from your status.

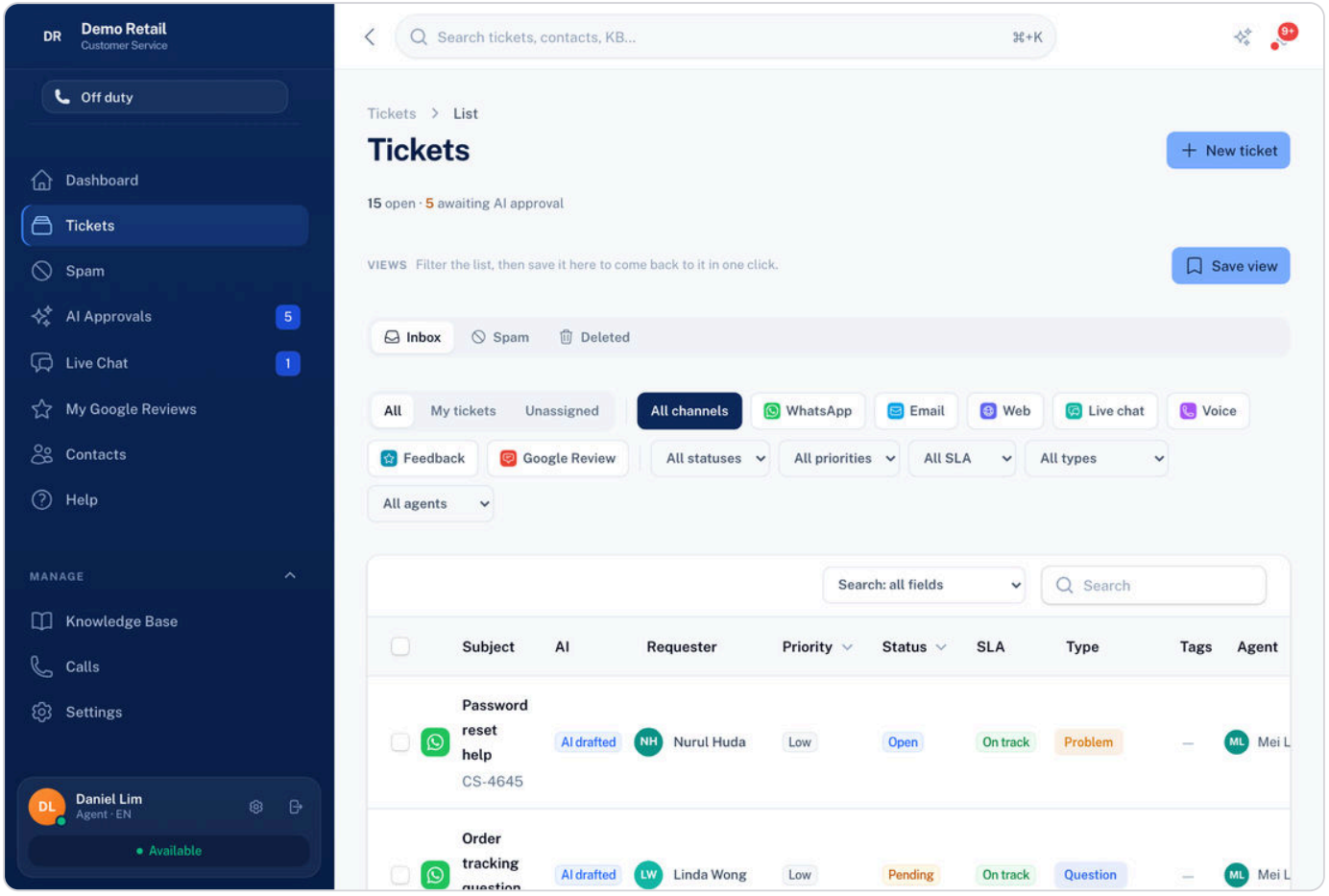
CUSTOMER SERVICE

Find your tickets

For: Agents

A ticket is one customer conversation, whatever way it came in.

1. Open **Tickets** in the menu on the left.
2. Use **All**, **My tickets** or **Unassigned** to choose whose tickets you see, and the channel buttons (**WhatsApp**, **Email**, **Web**, **Live chat**, **Voice**, **Feedback**, **Google Review**) to narrow it further.
3. Use the drop-down filters for status, priority, SLA (your target response time), type and agent, or type in **Search**.
4. Press a row to open the conversation.



To come back to the same filters later, press **Save view** and give it a name.

To change several tickets at once, tick them. A bar appears for changing the person, the status or the tags of all of them.

If you only ever see your own tickets, your role does not include seeing every ticket. Ask an administrator if you need it.

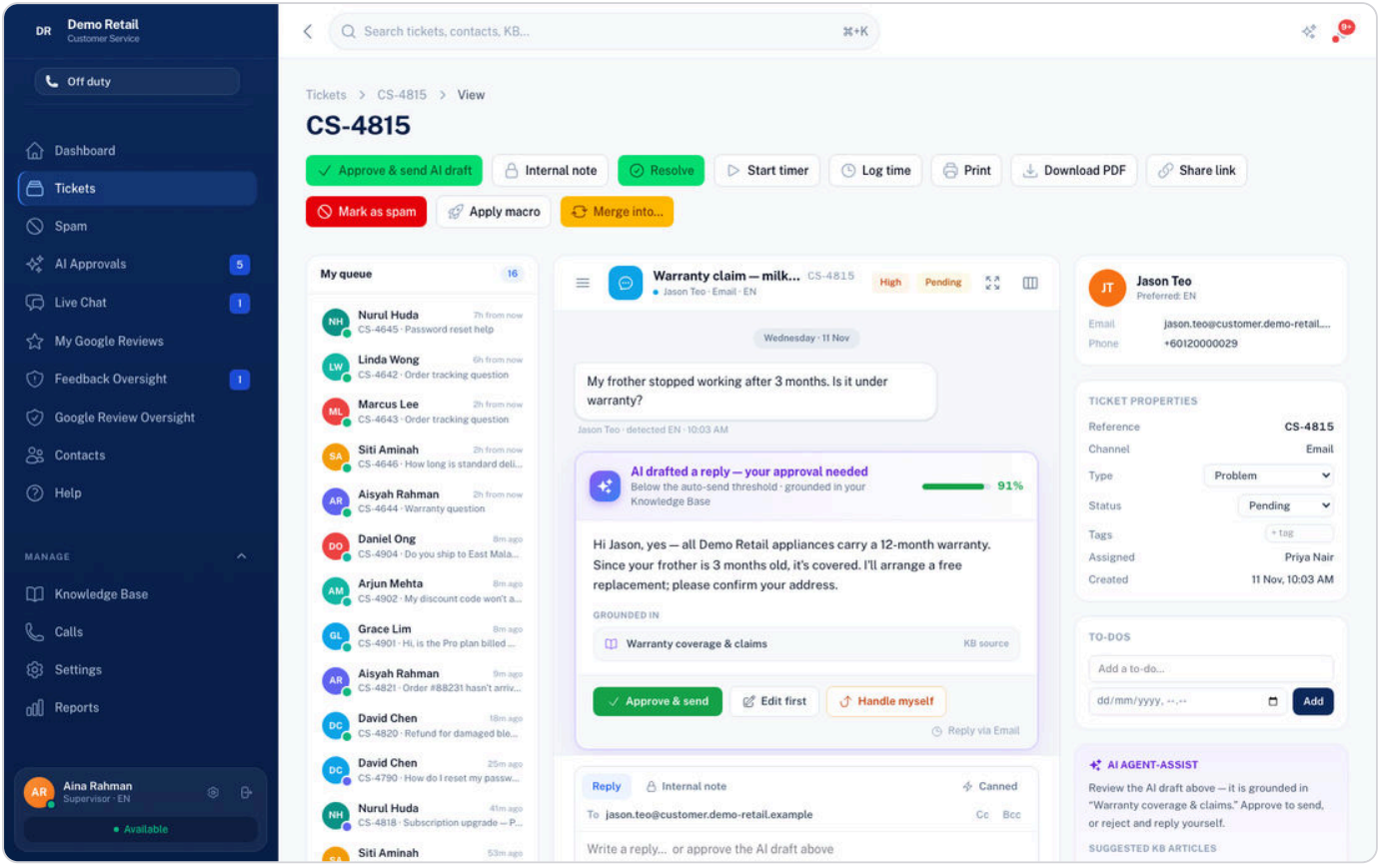
Press **⌘K** (on Windows **Ctrl+K**) at any time to jump to a ticket, a contact or a page.

Reply to a customer

For: Agents

The conversation is in the middle, your queue on the left, and the customer and ticket details on the right.

1. Read the conversation. Messages are shown in your working language, with the original underneath.
2. If the AI has drafted a reply, it shows how sure it is and which help article it used. Press **Approve & send** to send it as it is, **Edit first** to change it, or **Handle myself** to write your own.
3. To write your own, type in the box at the bottom and press **Send reply**. The customer gets it the same way they wrote to you.
4. Change **Status** on the right as you go. When you are done, press **Resolve**.



Other buttons on a ticket

- **Internal note**: a note only your team sees. Type @ and a name to call a colleague in.
- **Canned**: insert a saved reply. **Apply macro**: run a saved set of steps in one click.

- **Start timer** or **Log time**: record how long the ticket took.
- **Merge into…**: fold a duplicate ticket from the same customer into another.
- **Share link**: a read-only link for someone without an account, ending after 1 hour, 1 day or 7 days. Internal notes are never shown.
- **Print** or **Download PDF**: a copy of the conversation, without internal notes.
- **Mark as spam**: for junk. It stops the clock and leaves the reports.

WhatsApp's 24-hour rule

WhatsApp only allows a free reply within 24 hours of the customer's last message. After that, the box changes to **Send template**: pick one of your approved message templates to open the conversation again. This is WhatsApp's rule, not this module's.

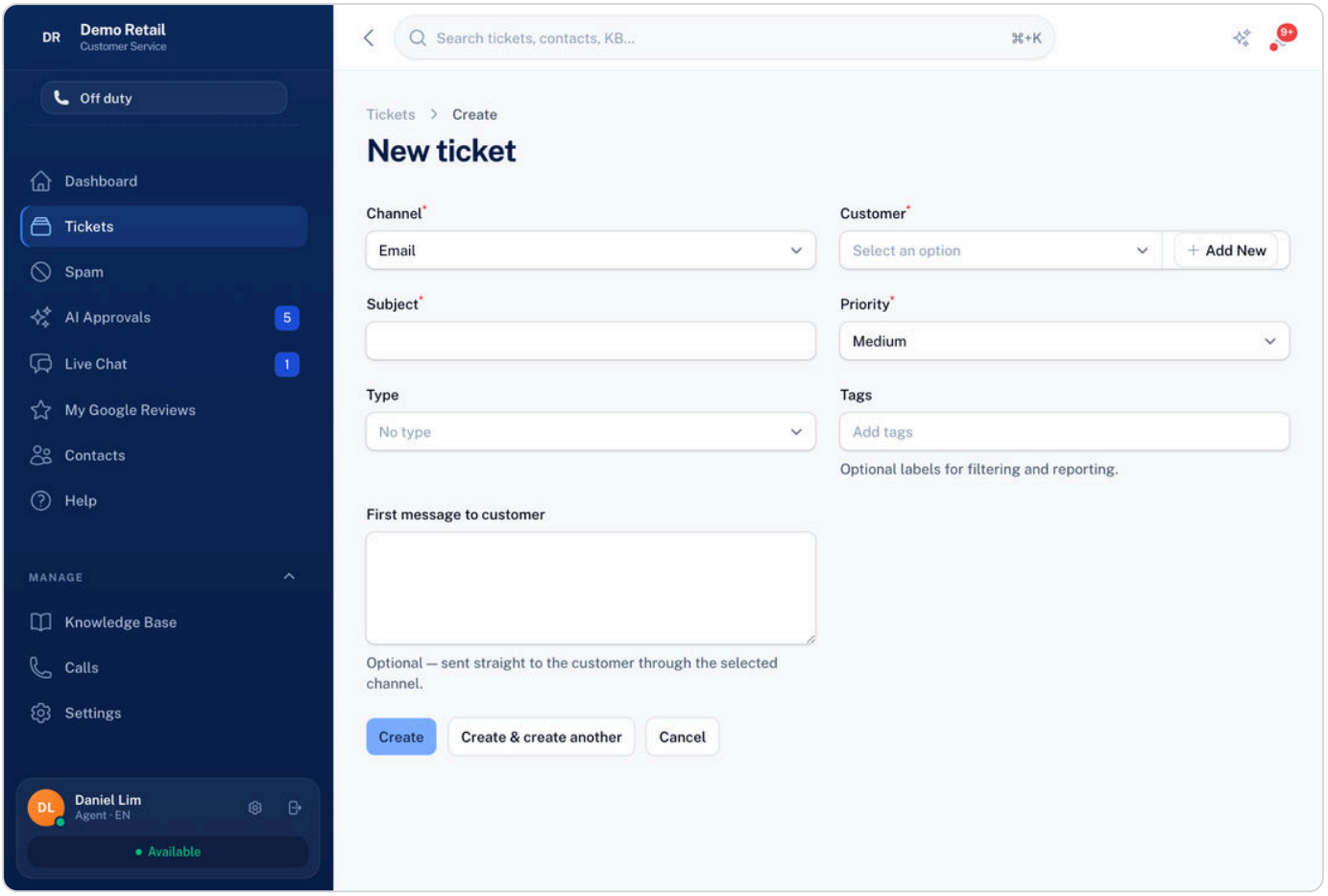
CUSTOMER SERVICE

Open a ticket yourself

For: Agents

Most tickets open by themselves when a customer writes in. When a request reaches you another way, such as a phone call or a walk-in, open one yourself.

1. Open **Tickets** and press **New ticket**.
2. Choose the **Channel** the customer wants replies on: **Email** or **WhatsApp**.
3. Choose the **Customer**, or press **Add New** to add them here.
4. Fill in the **Subject** and **Priority**, and if you like the **Type** and **Tags**.
5. To send the customer a first message now, write it under **First message to customer**. Leave it empty to open the ticket without contacting them.
6. Press **Create**.



A ticket you open yourself always starts a new conversation. It never joins an existing one.

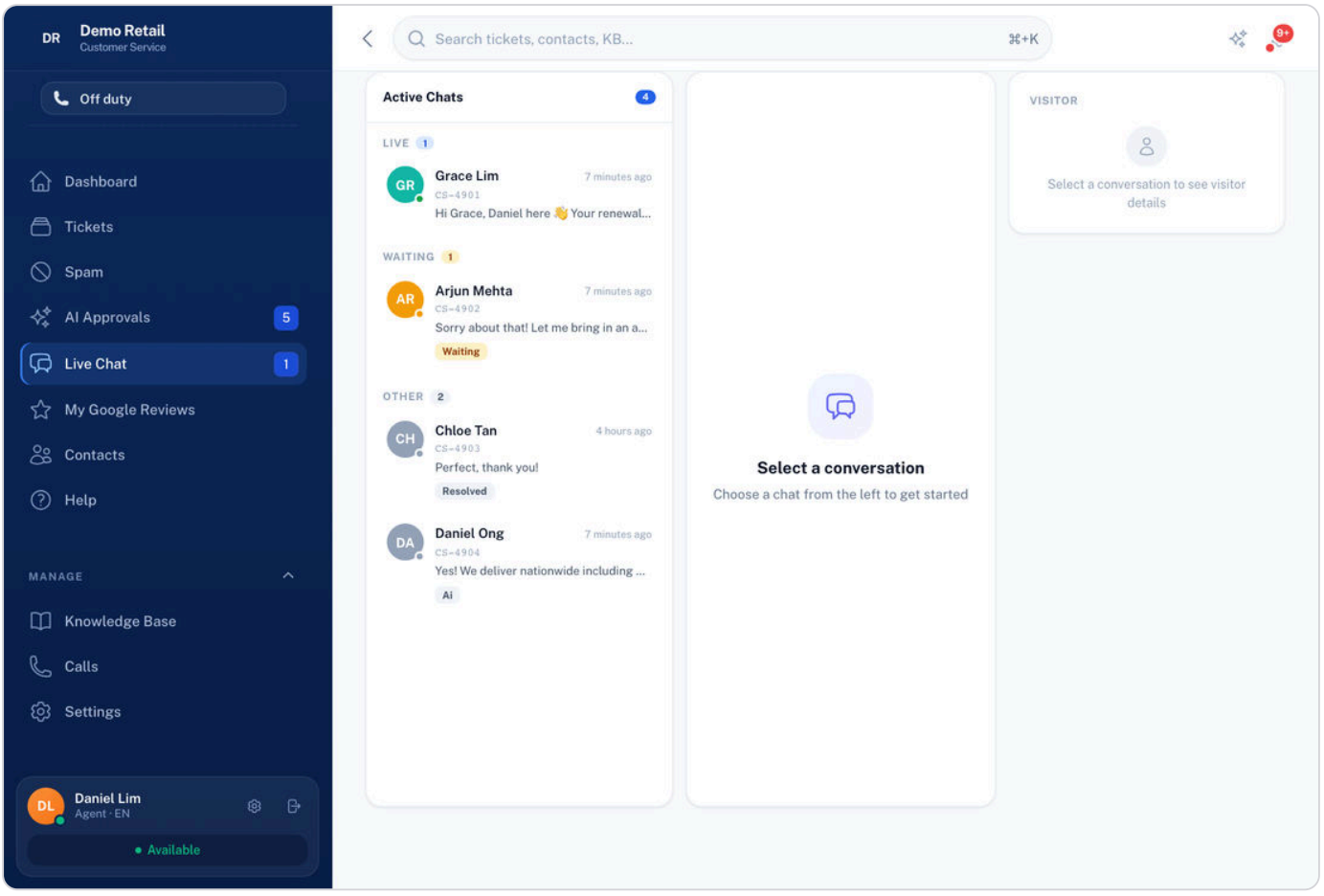
CUSTOMER SERVICE

Take live chats

For: Agents

Live chat is the chat bubble on your company's website.

1. Open **Live Chat** in the menu on the left. The number next to it is how many chats are waiting.
2. Chats are grouped into **Live**, **Waiting** and the rest. Press a waiting chat to take it.
3. Reply. The visitor sees your message straight away.
4. When you are done, resolve the chat so it leaves the list.



If chats stop updating by themselves, the live-update service has stopped. Tell whoever runs the system.

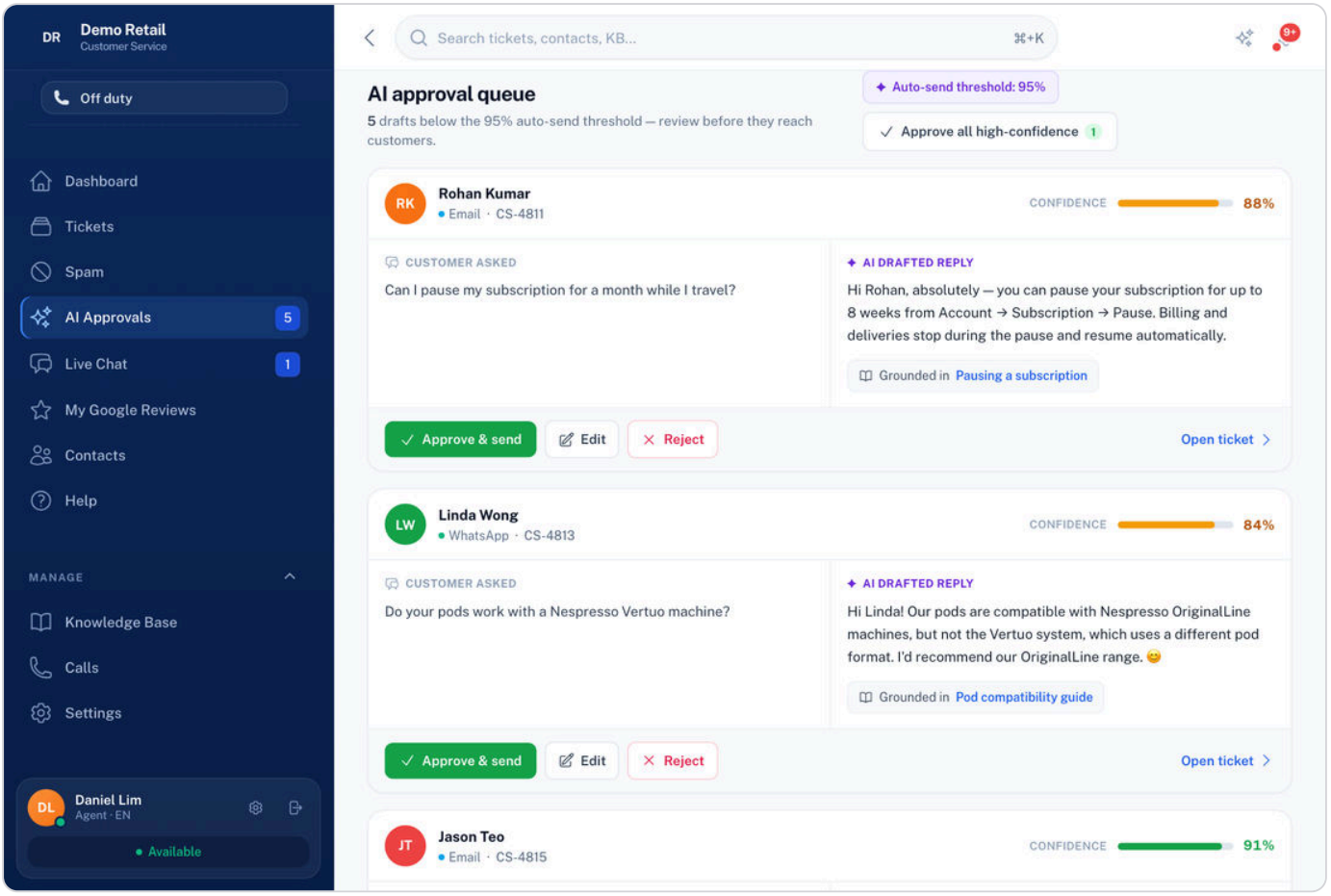
CUSTOMER SERVICE

Approve AI replies

For: Agents

When the AI is not sure enough to send a reply by itself, it waits for a person here.

1. Open **AI Approvals** in the menu on the left. The number next to it is how many replies are waiting.
2. Read the customer's question and the AI's reply side by side, and check which help article it used.
3. Press **Approve & send**, **Edit** to change it first, or **Reject** to throw it away and reply yourself.



The top of the screen shows the level above which replies send without a person. **Approve all high-confidence** approves every draft above that level at once.

If a ticket says **No matching answer — human required**, that is on purpose: no approved article covered the question, so it did not guess. Write or improve a help article so it can answer next time.

CUSTOMER SERVICE

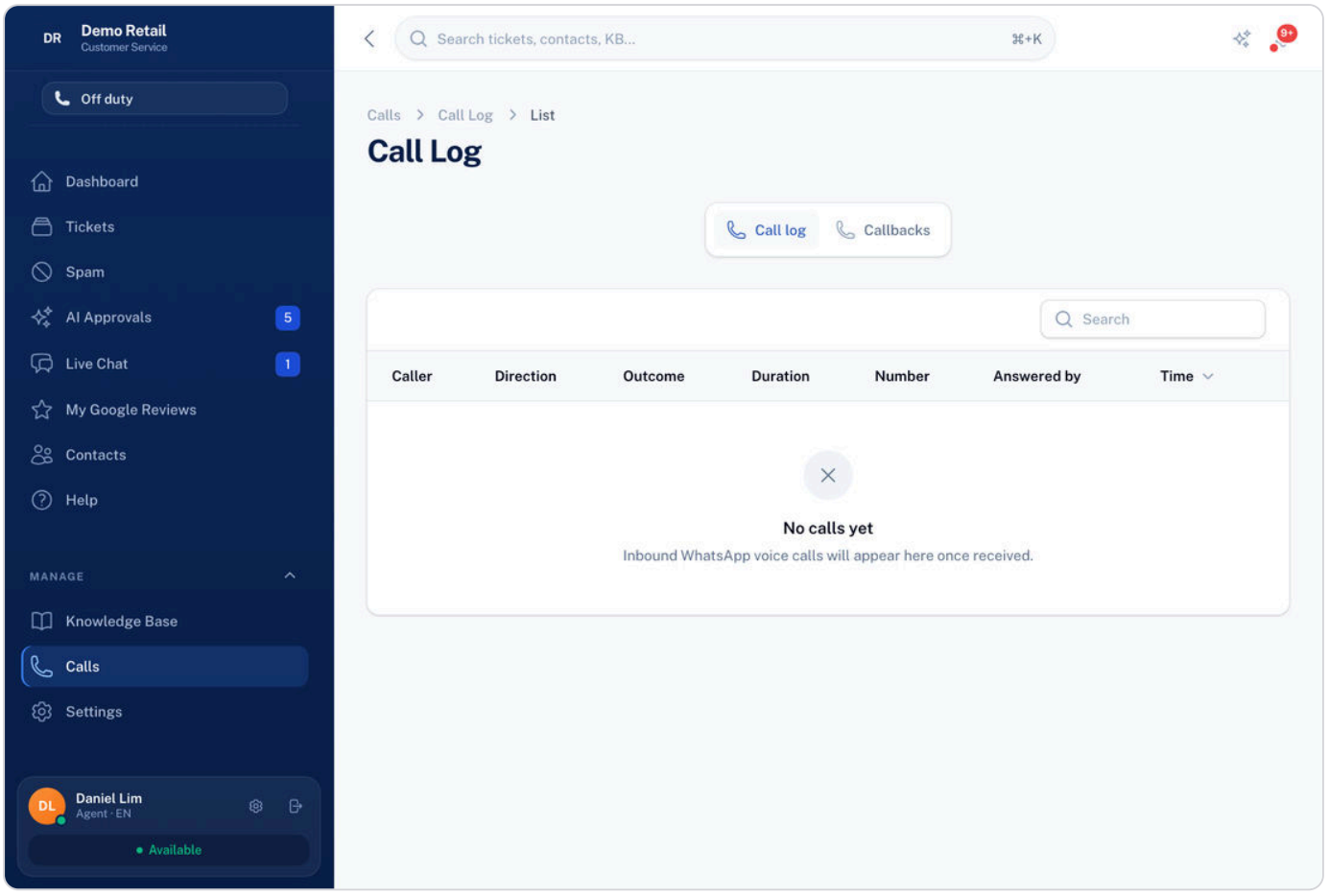
Answer WhatsApp calls

For: Agents

When calling is switched on for a WhatsApp number, customers can call it and you answer in the browser. No desk phone is needed.

1. Set the switch at the top of the menu to **On duty**, and allow the microphone when the browser asks.
2. A call rings with a pop-up. Press **Accept** to talk, or **Decline**.
3. Every call is saved to a ticket with its recording. After the call it is written out as text with a short AI summary. If the summary is missing, open the call in the ticket and press **Create AI summary**.

A missed call becomes a callback request. Open **Calls**, then **Callbacks**, take one, and call the customer back when you are free.



The picture was taken on a copy with no WhatsApp number connected, so no calls are listed.

If a call will not connect, check the microphone permission and that you are **On duty**. A strict office firewall can block calls; try another network.

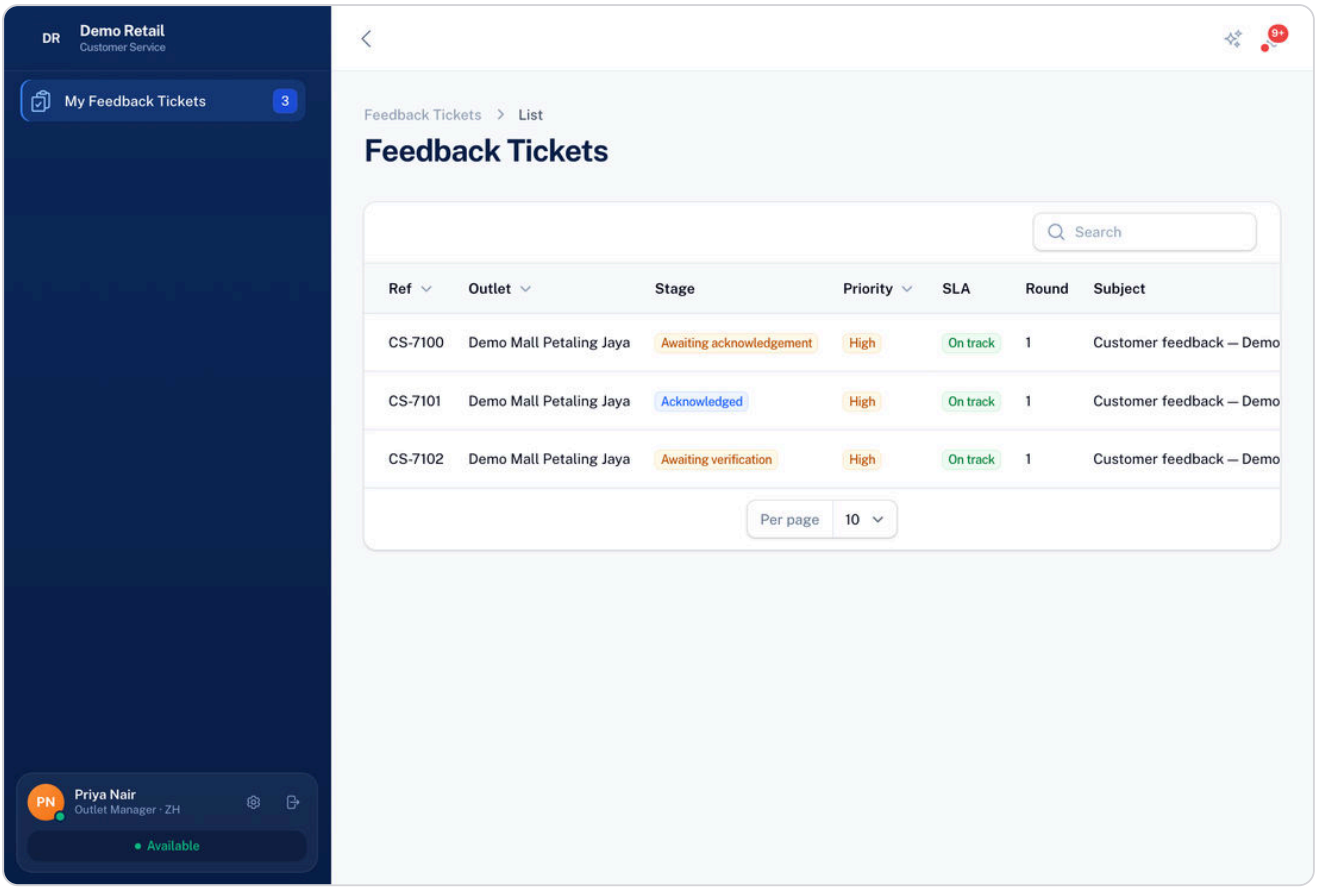
CUSTOMER SERVICE

Act on customer feedback at your outlet

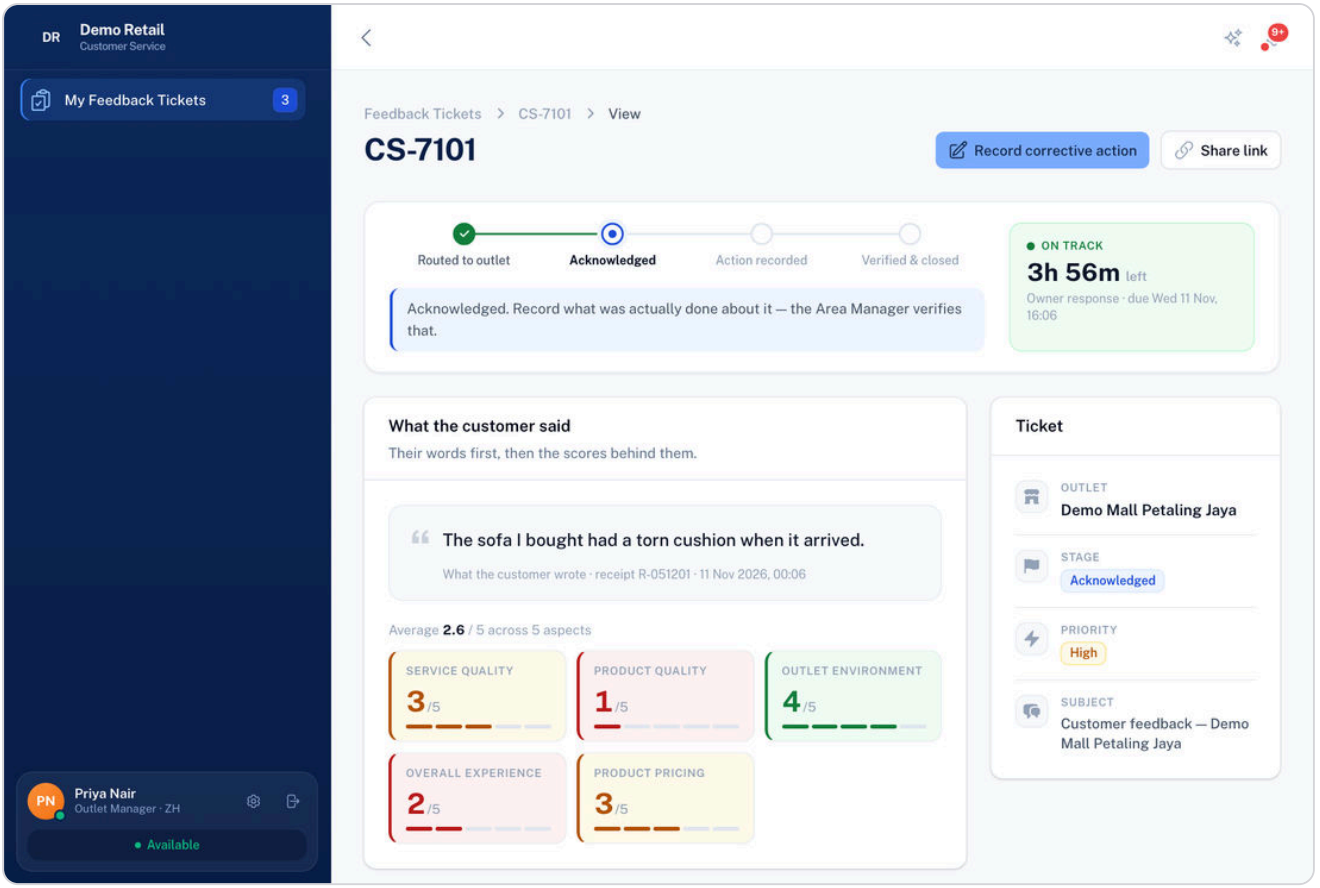
For: Outlet Managers

When a customer at your outlet gives a low score or complains in the survey, a feedback ticket comes to you. You see one menu item: **My Feedback Tickets**.

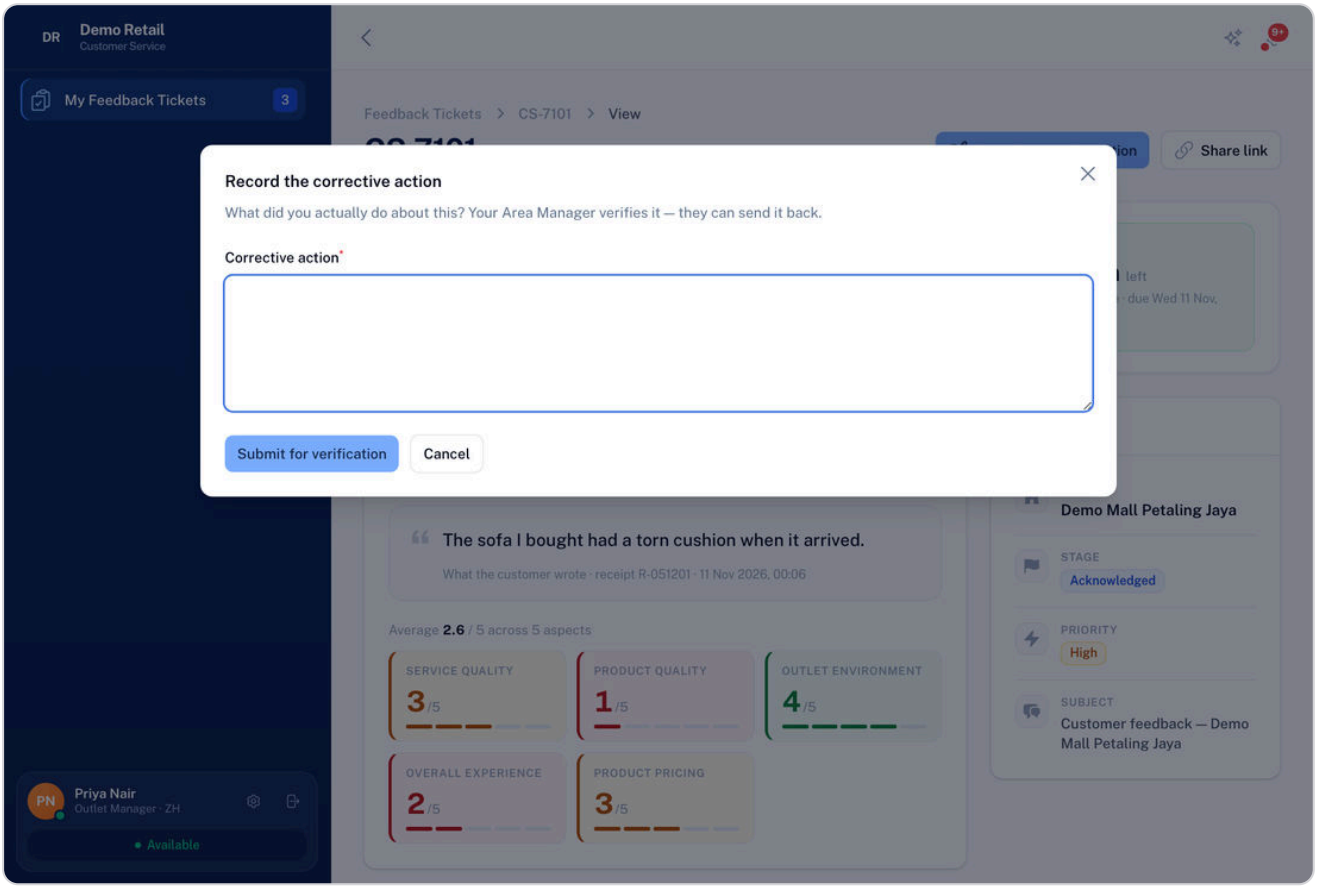
1. Open **My Feedback Tickets**. The **Stage** column says what is waiting, and **SLA** says whether you are still in time.



2. Open a ticket. You see the customer's words, their receipt number and their five scores.
3. Press **Acknowledge** to say you have seen it.



4. When you have dealt with it, press **Record corrective action**, write what was actually done, and press **Submit for verification**.



Your Area Manager then checks it. If they send it back, it returns to you as **Returned for rework** with their reason, and you record a new action.

The time left is shown on the ticket. If you miss the deadline, an alert goes out, and after that Customer service can close the ticket as **Owner non-responsive**.

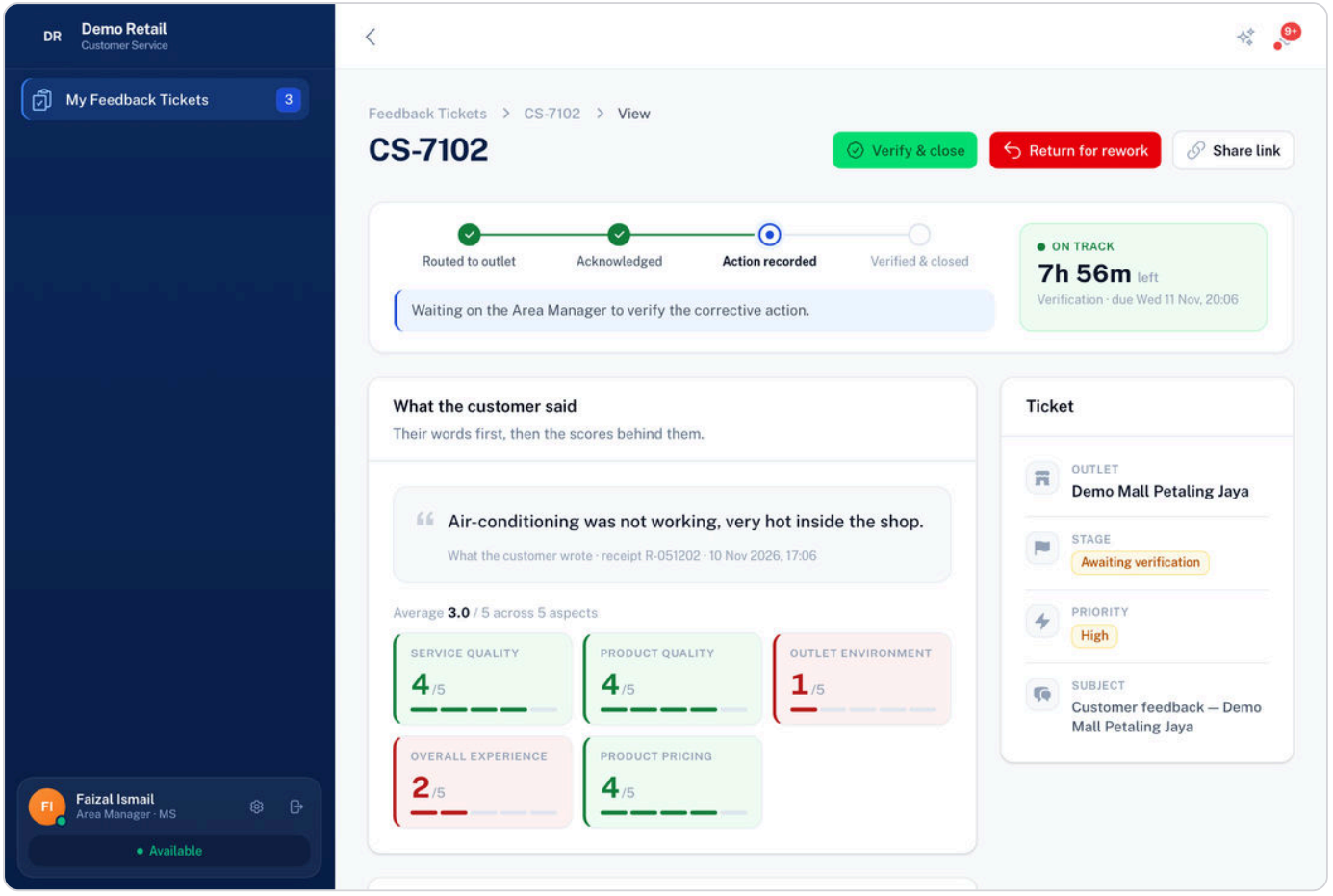
CUSTOMER SERVICE

Check what an outlet did

For: Area Managers

When an Outlet Manager records what they did about a customer's complaint, you check it. The person who recorded the fix can never be the one who signs it off.

1. Open **My Feedback Tickets** and open a ticket at **Awaiting verification**.
2. Read the customer's complaint and, under **Corrective action**, what the outlet did.
3. If it is enough, press **Verify & close**. You can add a note.
4. If not, press **Return for rework** and write **Why is this not enough?**. It goes back to the Outlet Manager.



Ask for an outlet audit

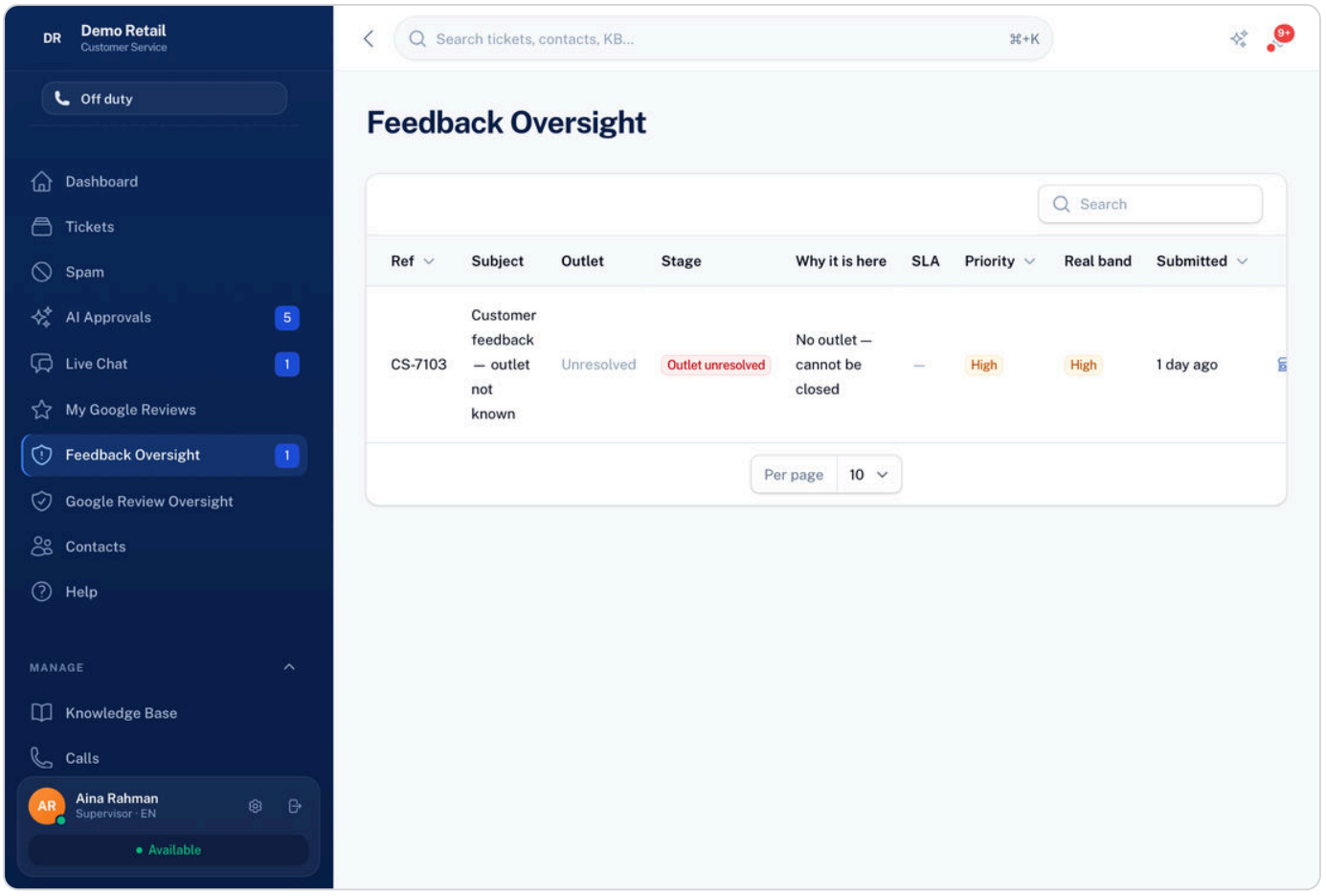
If an outlet needs a proper inspection, press **Request an outlet audit** on the ticket, choose **Audit must happen by**, and write **Why does this outlet need auditing?**. The request appears in **Outlet audit** as a one-off audit schedule. This button only shows once the link to Outlet audit is switched on.

CUSTOMER SERVICE

Watch for feedback that is stuck

For: Supervisors

Feedback Oversight lists feedback tickets that cannot move by themselves: no outlet, no owner, held for checking, or past their deadline. The **Why it is here** column says which.



On each row you can:

- **Assign outlet**: when the survey did not say which outlet it was. The ticket then goes to that outlet's manager.
- **Release hold**: for a ticket held for checking, for example because the same phone number sent many surveys.
- **Close: owner non-responsive**: when the outlet never answered.

Google Review Oversight does the same for Google reviews that came in as tickets: those with no agent, or past their deadline. **My Google Reviews** lists the Google review tickets given to you.

CUSTOMER SERVICE

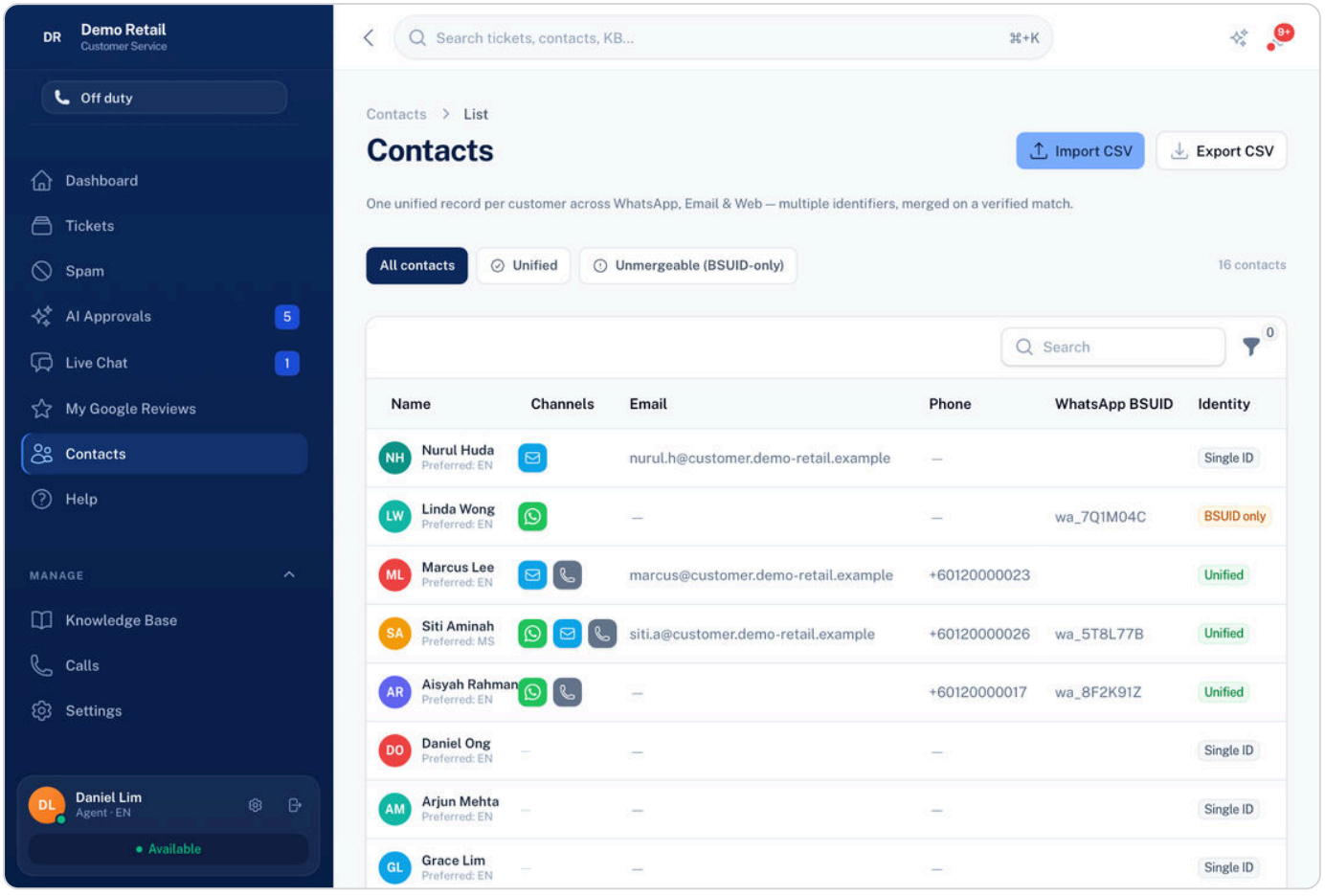
Keep customer details right

For: Agents

Each customer has one record, even if they have written from WhatsApp, email and chat. Correct details keep their conversations together.

1. Open **Contacts** in the menu on the left.
2. Press a customer to see and change their name, phone, email and history.
3. To bring in a list of customers, press **Import CSV**. To take the list out as a spreadsheet, press **Export CSV**.

New customers are added by themselves when they first write in, or with **Add New** when you open a ticket yourself.



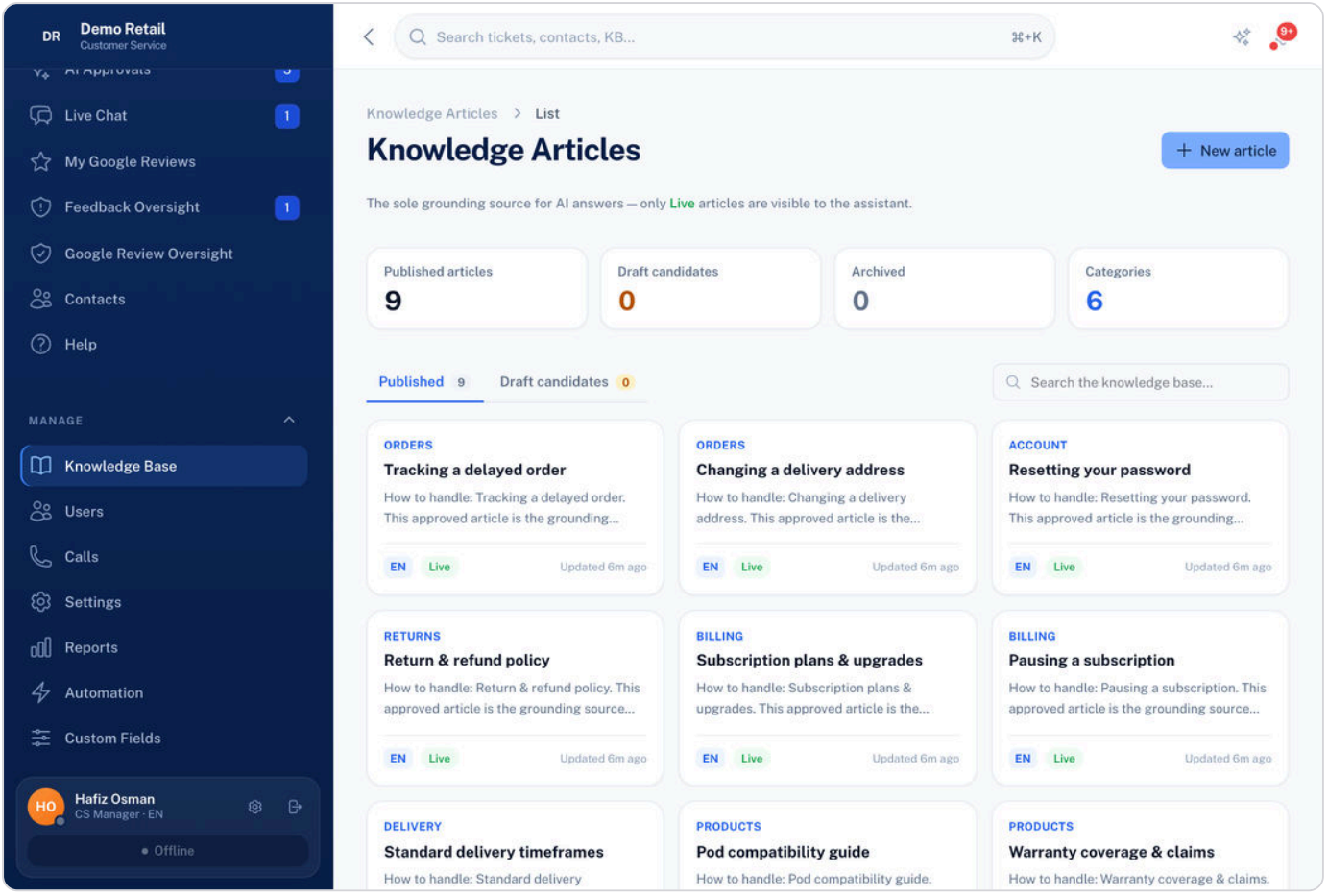
Changing a contact's details needs a permission some roles do not have.

Write help articles

For: CS Managers

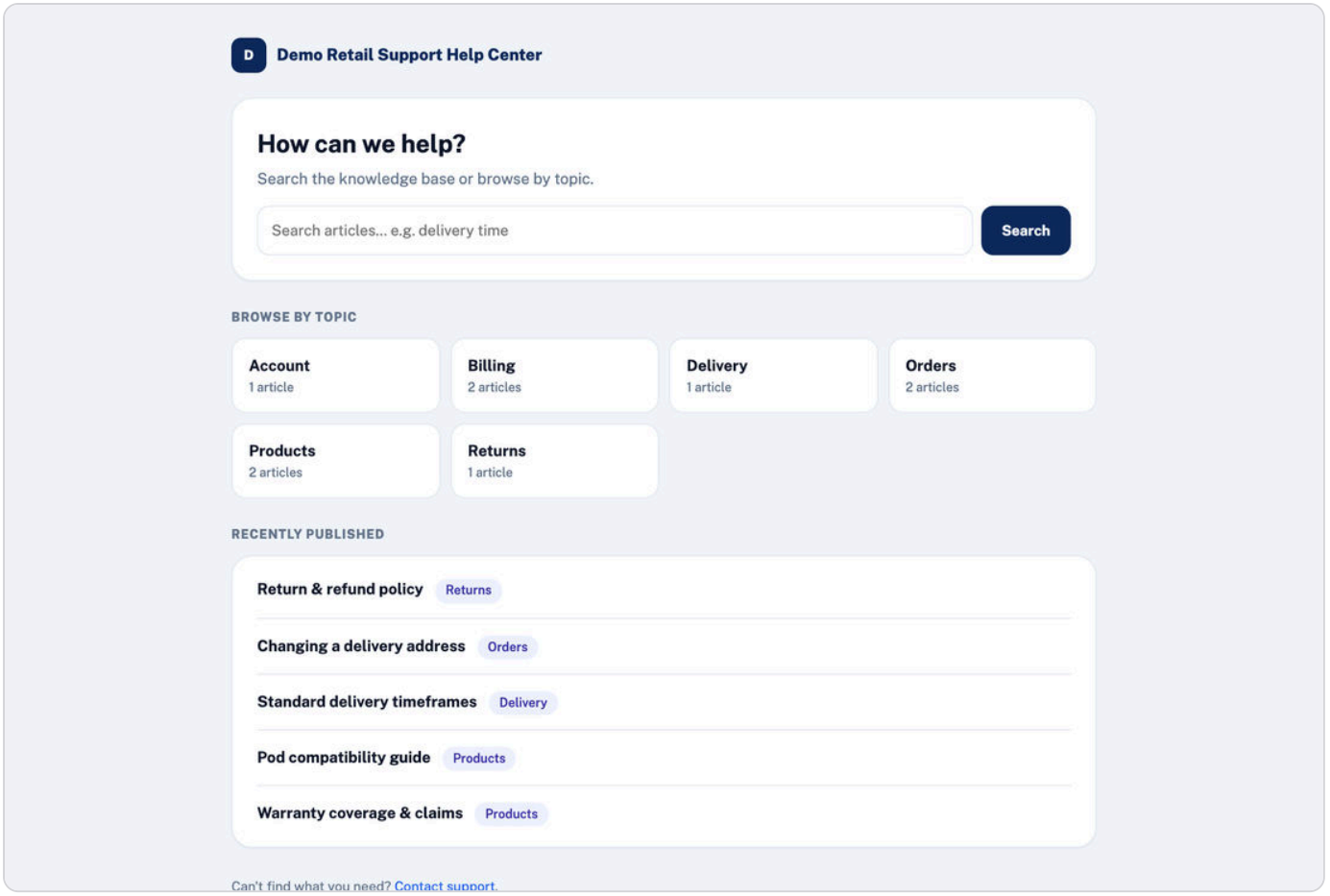
Help articles are the only source the AI answers from. The same articles appear in the public help centre, where customers can find an answer before they write in. Better articles mean better AI replies and fewer tickets.

1. Open **Knowledge Base** under **Manage**.
2. Press **New article**, or open an existing one to change it.
3. Fill in the **Title**, **Category**, **Language** and **Body**. Write it clearly.
4. Set **Status** to **Approved** and press **Create**. Only approved articles are used by the AI and shown to customers. **Draft** articles are not.



Under **Attachments**, press **Add document** to attach a PDF, Word, Excel or CSV file, such as a price list or a policy. Its text is read out of the file and added to the article, so you do not need to retype it.

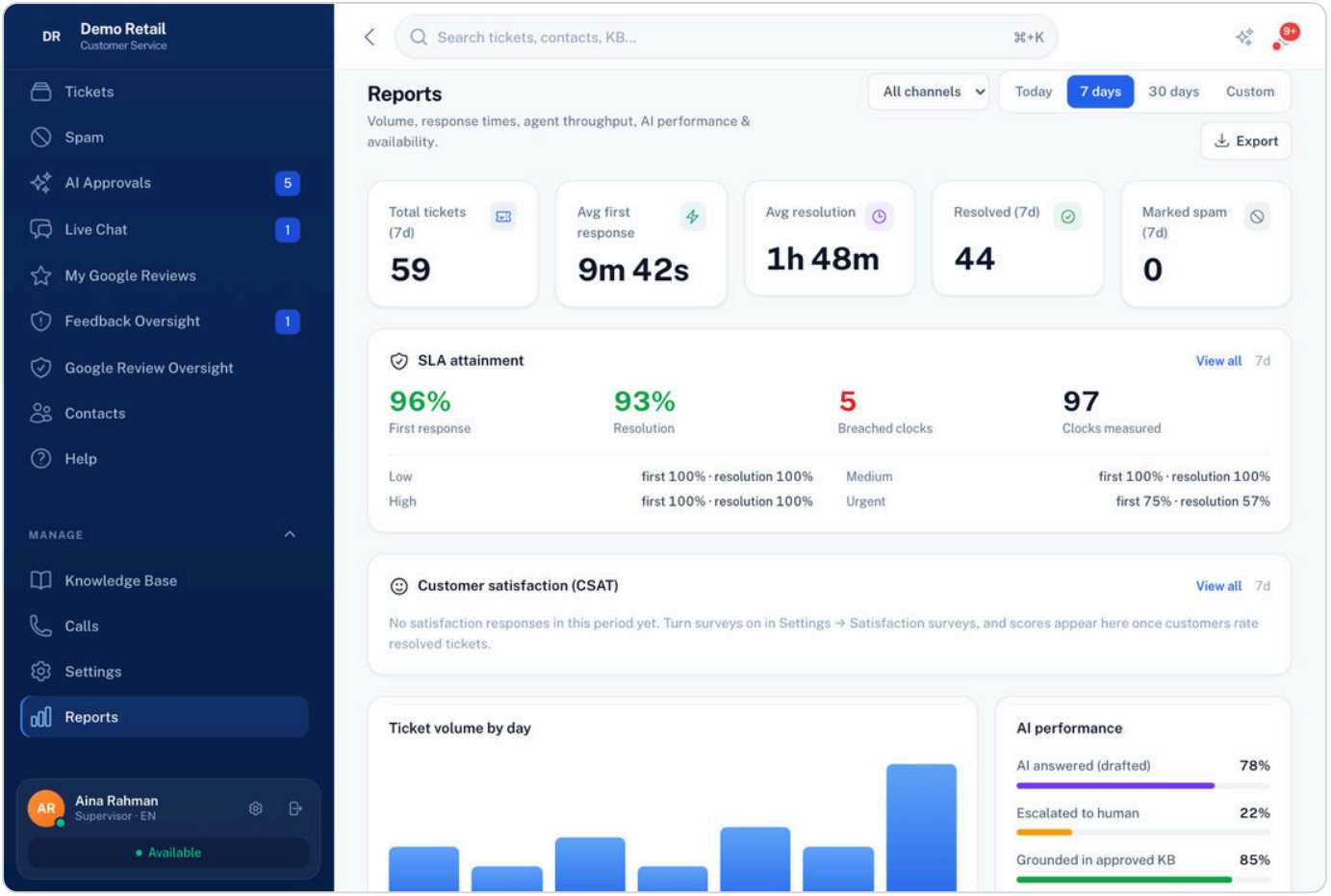
Reports has a **Knowledge gaps** panel: questions the AI could not answer. Each one is a candidate for a new article.


D
Demo Retail Support Help Center
How can we help?
Search the knowledge base or browse by topic.
Search articles... e.g. delivery time
Search
BROWSE BY TOPIC
Account
1 article
Billing
2 articles
Delivery
1 article
Orders
2 articles
Products
2 articles
Returns
1 article
RECENTLY PUBLISHED
Return & refund policy
Returns
Changing a delivery address
Orders
Standard delivery timeframes
Delivery
Pod compatibility guide
Products
Warranty coverage & claims
Products
Can't find what you need? Contact support.

Read the reports

For: Supervisors

1. Open **Reports** in the menu on the left.
2. Choose the period at the top: **Today**, **7 days**, **30 days** or **Custom**, and the channel.
3. Press **Export** to take the numbers into a spreadsheet.



What it shows:

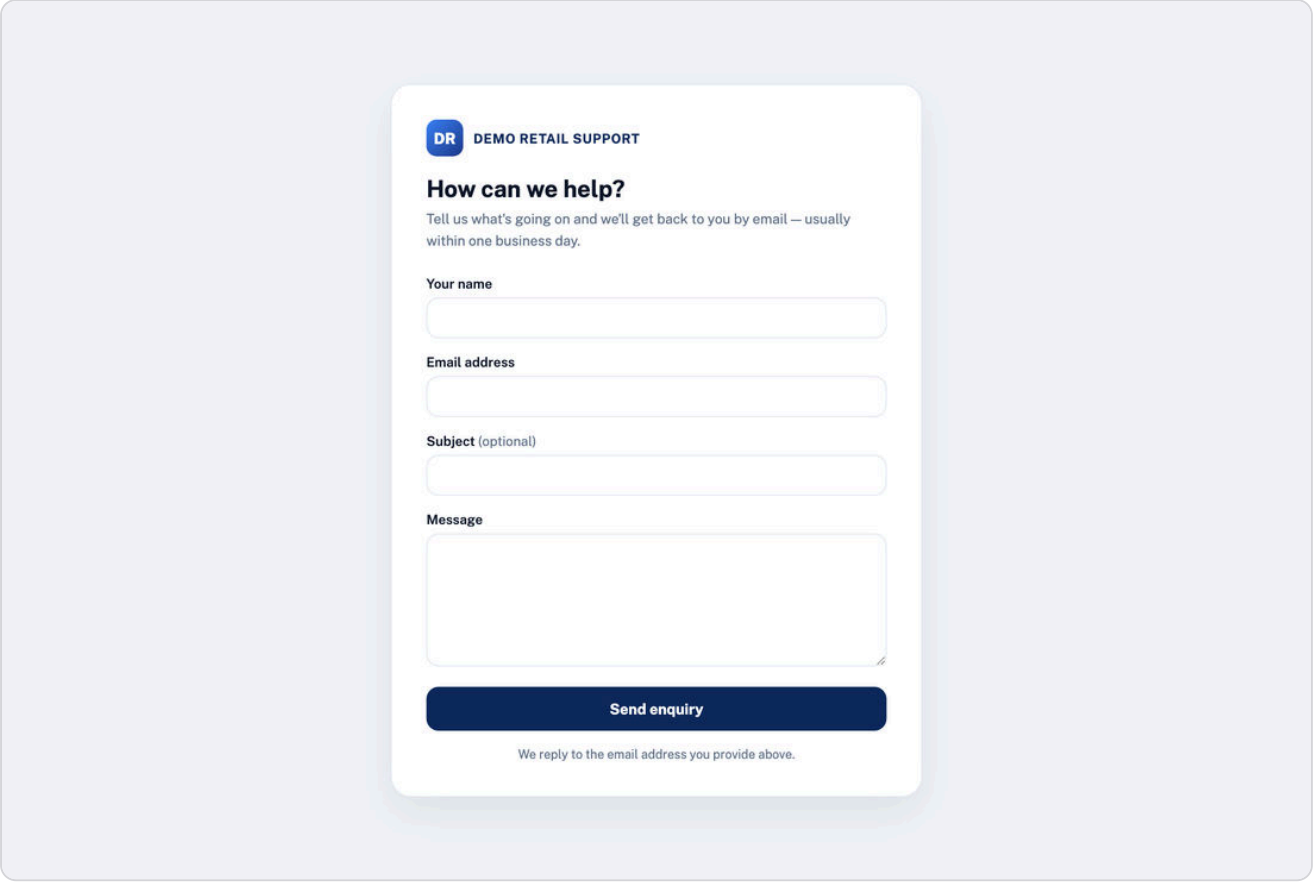
- how many tickets came in, how fast they were first answered and resolved, and how many were spam
- **SLA attainment**: how often the team met its response and resolution targets, and how many missed
- **Customer satisfaction (CSAT)**: the average rating from the short survey sent after a ticket is resolved. It stays empty until surveys are switched on in **Settings**.
- how much the AI answered by itself and how much it passed to people
- **AI usage & estimated cost**, for roles allowed to see it

What customers see

For: Everyone

Customers use these pages without an account.

- **The support form.** A customer types their name, email address, an optional subject and a message, and presses **Send enquiry**. It becomes a ticket, and replies go to them by email.

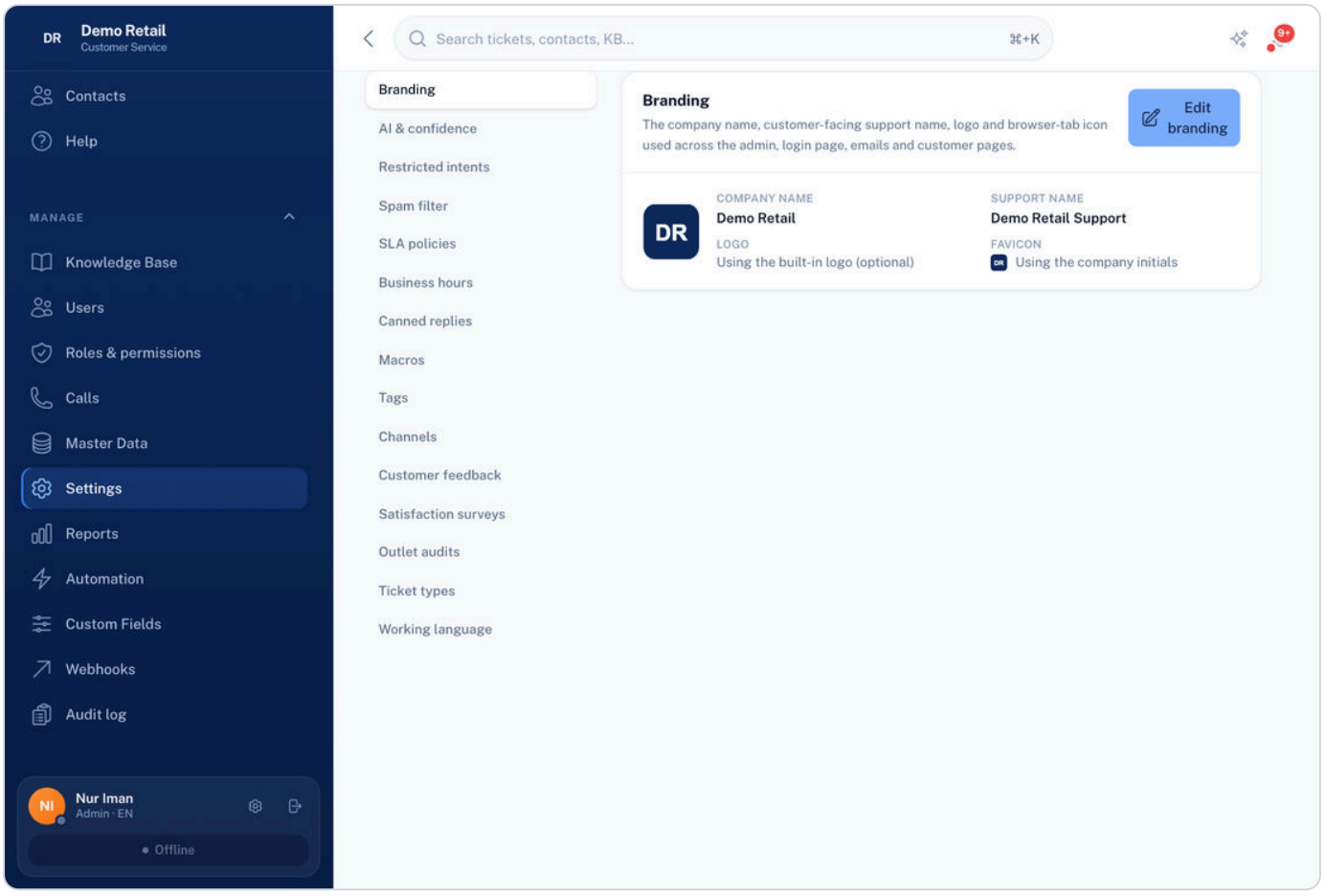


- **The help centre.** Customers search the help articles or browse by topic. Only approved articles appear.
- **The chat bubble** on your website. Visitors can chat with you, and sign in with a one-time code by SMS or WhatsApp to see and continue past chats on any device. A short check guards the first message against spam.
- **Out of hours**, everyone gets one automatic message saying you are closed and when you open again, if that is switched on.

Change how the system works

For: Admins

Open **Settings** under **Manage**. Each section is listed on the left. Changes apply to everyone as soon as you save.



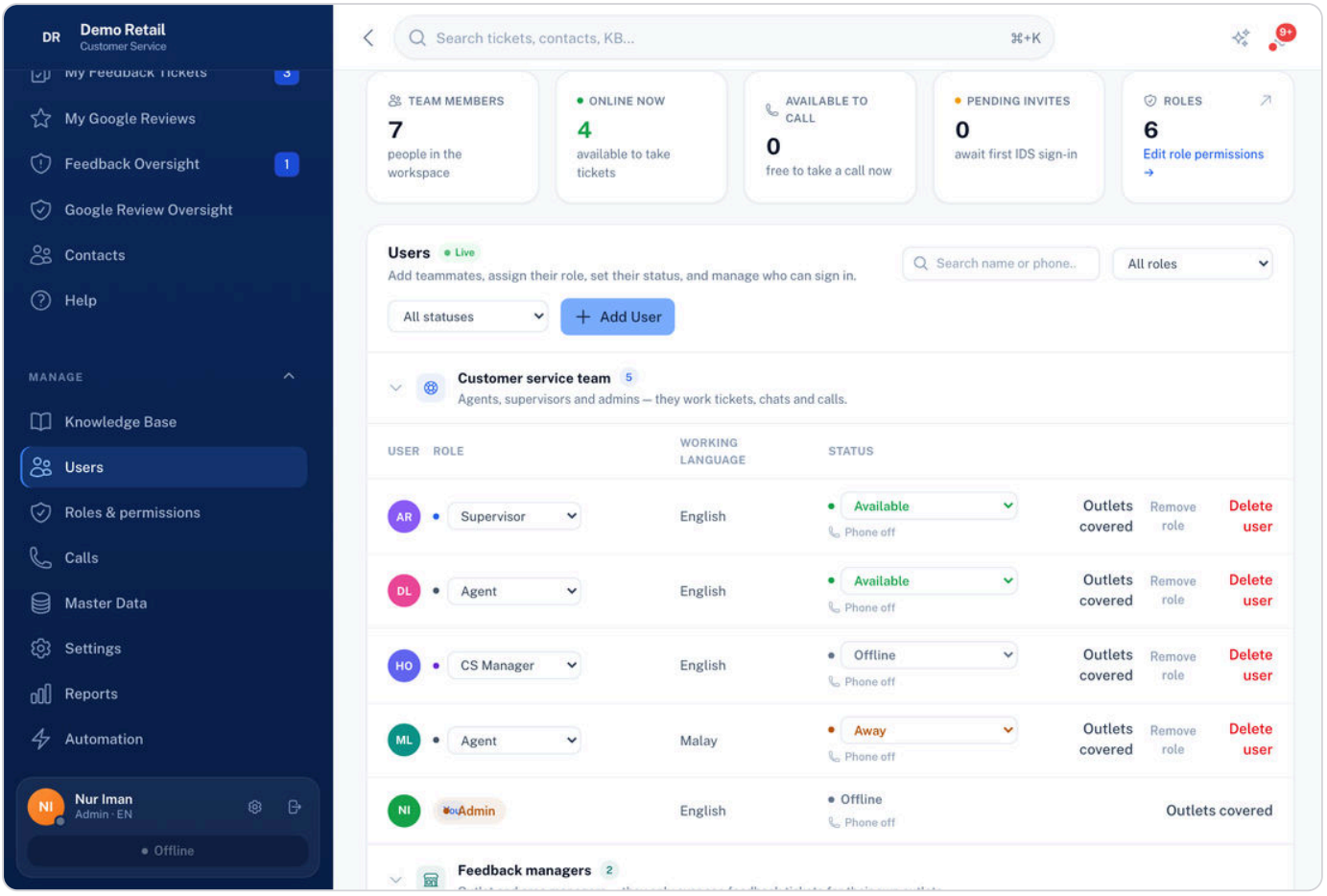
Section	What it sets
Branding	Your company name, the name customers see on replies, your logo and the browser-tab icon. Without a logo, your initials are shown in the menu.
AI & confidence	How sure the AI must be before a reply goes out without a person, and whether it may send by itself at all.
Restricted intents	Words that always send a message to a person, however sure the AI is.
Spam filter	How junk messages are caught.
SLA policies	Your target times for first reply and for resolving, by priority. They can count only opening hours.

Section	What it sets
Business hours	Opening hours and public holidays, and the automatic out-of-hours reply.
Canned replies, **Macros**, **Tags**	Saved replies, saved sets of steps, and labels for tickets.
Channels	WhatsApp numbers, email mailboxes and the chat bubble for your website.
Customer feedback	The link to the Customer feedback module.
Satisfaction surveys	The short rating sent to customers after a ticket is resolved.
Outlet audits	The link to the Outlet audit module, and when audits are requested automatically.
Ticket types	The kinds of ticket, such as question or incident.
Working language	Your own language for replies and for the translated view of customer messages.

Give people access

For: Admins

1. Open **Users** under **Manage**. The top shows how many people are online and free to take calls.
2. Press **Add User** to invite someone, and choose their role.
3. To change someone's role, use the role drop-down on their row. Supervisors and above can also change a person's status here, for example to **Offline** when their shift ends.
4. When someone leaves, press **Delete user** on their row.

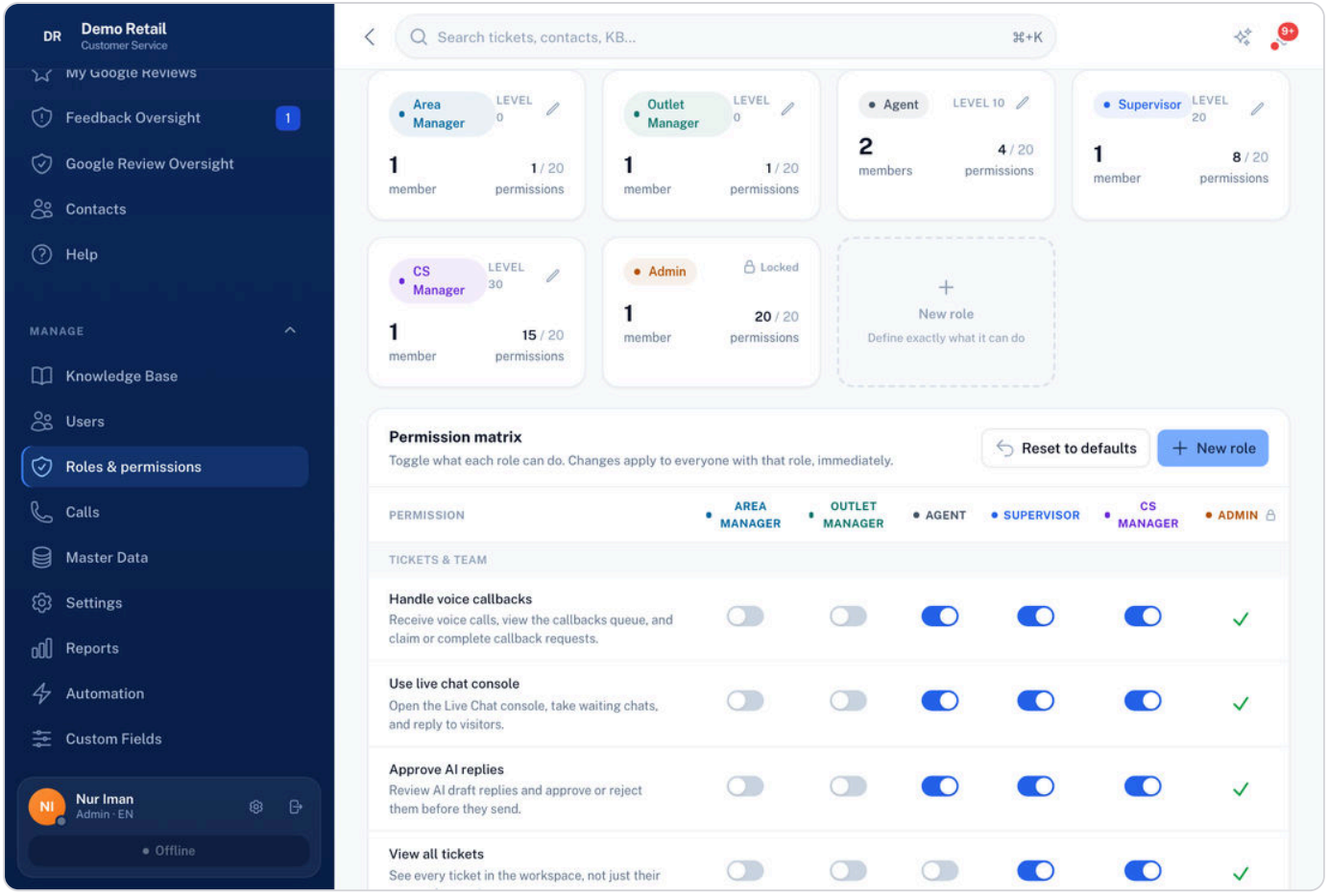


Outlet Managers and Area Managers are listed separately under **Feedback managers**, with the outlets they cover.

Change what a role can do

1. Open **Roles & permissions** under **Manage**.
2. Switch each permission on or off for each role in the table. Changes apply at once to everyone with that role.

3. Press **New role** to make your own.



You cannot give anyone more than your own level. Give **Admin** sparingly: it can do everything, including settings and people. **Supervisor** or **CS Manager** suits most team leaders.

Audit log under **Manage** shows who changed what, and when.

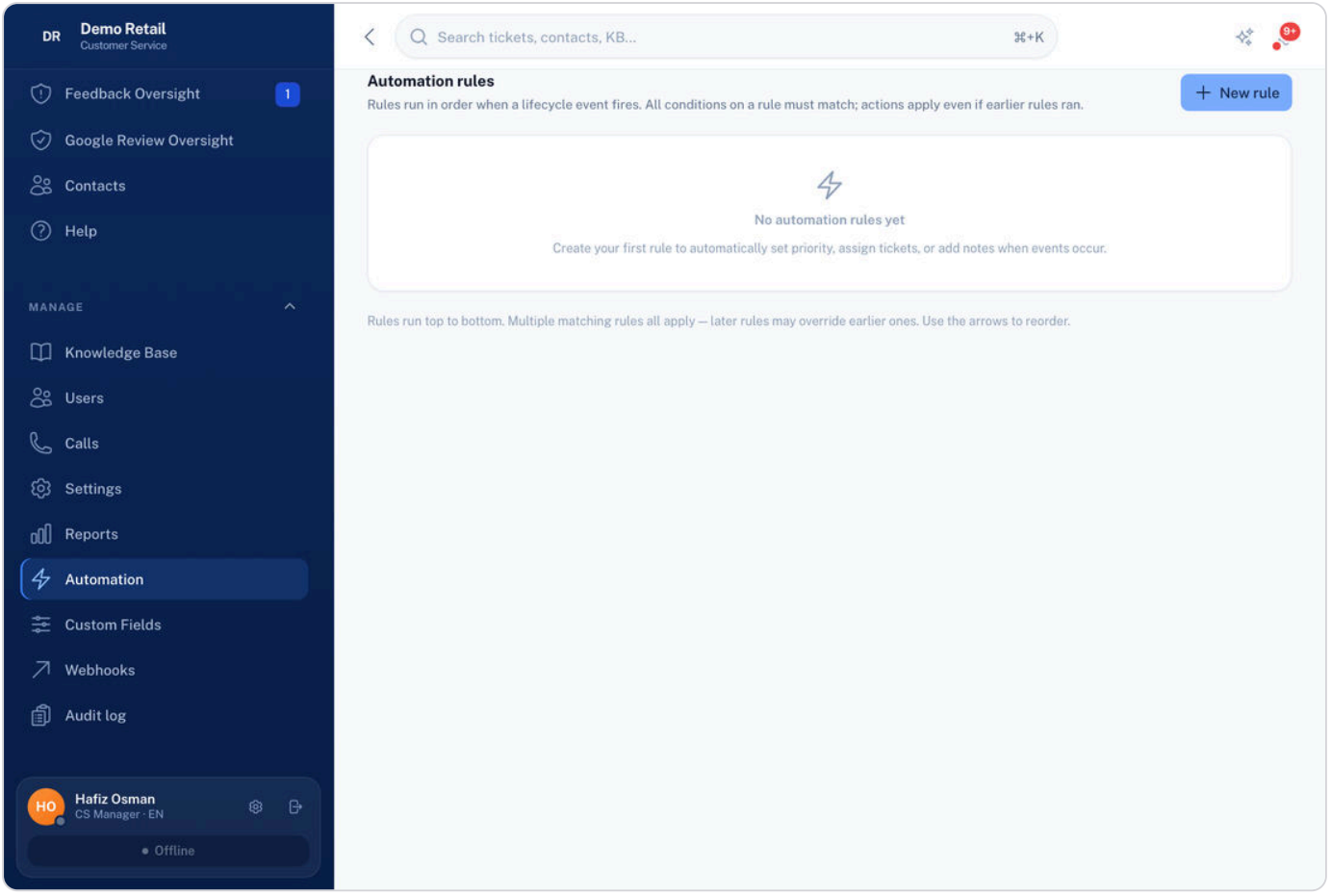
CUSTOMER SERVICE

Set up automatic rules, extra fields and links

For: CS Managers and Admins

Automatic rules

1. Open **Automation** under **Manage**.
2. Press **New rule**. Choose a condition, such as the ticket type or channel, and an action, such as giving it to someone, adding a tag or setting the priority.
3. Rules run from top to bottom, and every matching rule applies. Put the most specific rules first.



Extra fields

Custom Fields under **Manage** adds your own fields to tickets or contacts: text, number, drop-down, on/off and more. Mark a field **Show on web form** to ask customers for it on the support form.

Links to other systems

These are for your technical team.

- **Webhooks** under **Manage** sends ticket events to another system. Copy the signing secret when it is shown: it is shown only once. If it is lost, delete the endpoint and make a new one.
- Other systems can also read tickets and contacts, and add notes, through an access key your technical team creates. There is no screen for this.

USER GUIDE · VERSION 1

Customer feedback

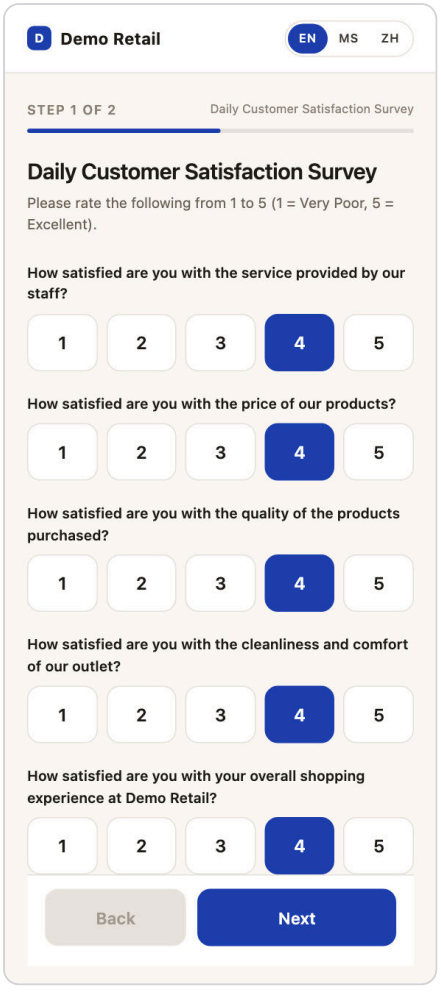
Customers scan a QR code at the outlet and rate their visit. You read the answers per outlet, and unhappy customers are passed to Customer service for a call back.

1. What it is for
2. What customers see
3. Read the dashboard
4. Read survey answers
5. Make a satisfaction report
6. Check what the AI decided about a comment
7. See which customers were sent to Customer service
8. Send reports automatically
9. Ask the Data Analyst a question
10. Change the survey
11. Add outlets and print their QR codes
12. Give people access
13. Set your company name and logo

What it is for

For: Everyone

Customer feedback collects short surveys from customers. A customer scans the QR code at an outlet or on their receipt, rates five things from 1 to 5 (staff service, price, product quality, the outlet, and the visit overall), and can leave a comment and a phone number. Staff read the answers here and see how each outlet is doing. When a customer is unhappy, the module opens a ticket in Customer service so someone can call them back.



Who uses it

Your role is shown under **Roles** on the **Users** screen.

Role	What they can do
super_admin (Super Admin)	Everything, for every outlet, including outlets, users, roles and the **Data Analyst**.

Role	What they can do
admin (Admin)	For their own outlets: read and export answers, check the AI's verdicts, see which customers were sent to Customer service, change the survey, make and schedule reports, change the branding, and read the **Audit log**.
auditor (Auditor)	For their own outlets: read and export answers, make reports, and read the **Audit log**. They cannot change anything.

A Super Admin can change what each role includes, so yours may differ.

What it needs from other modules

- You sign in with your company account through the Portal. There is no separate password.
- Unhappy customers are sent to **Customer service** as tickets. Without it, nobody is told to call them back.

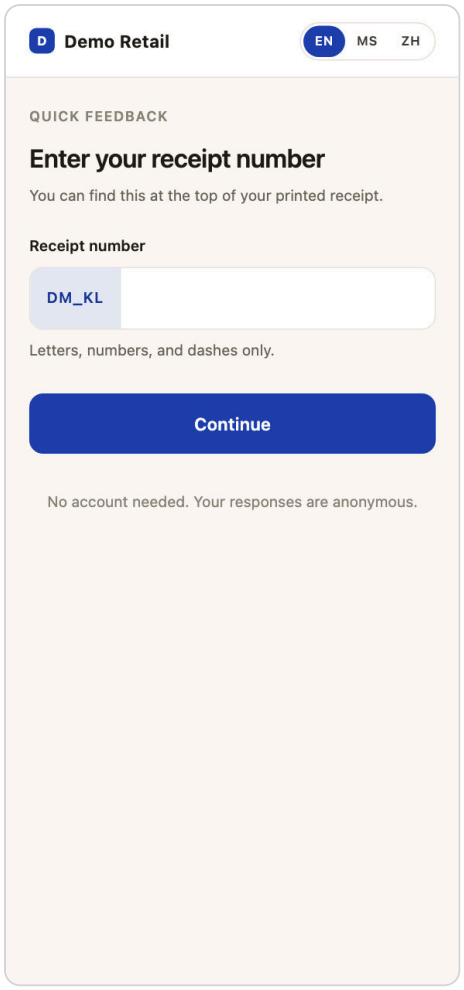
CUSTOMER FEEDBACK

What customers see

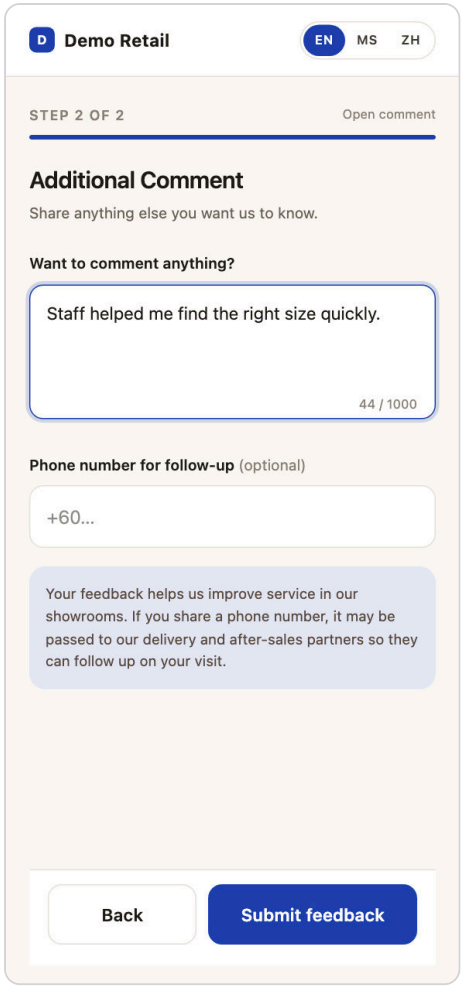
For: Everyone

Customers need no account. The survey takes about a minute, and they can switch between English, Malay and Chinese at the top.

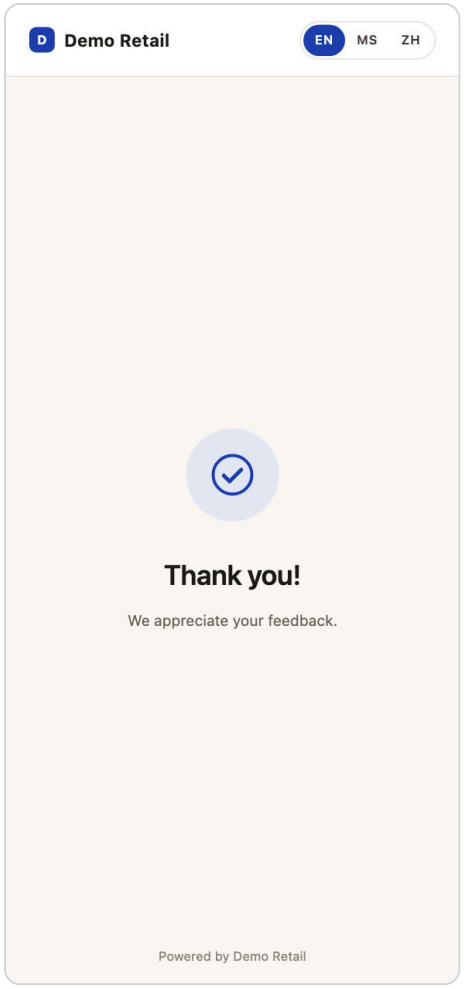
1. The customer scans the outlet's QR code and types their **Receipt number**, then presses **Continue**.



2. They rate five things from 1 (very poor) to 5 (excellent) and press **Next**.
3. They can write a comment and leave a phone number for a call back. Both are optional. They press **Submit feedback**.



4. They see a thank-you page. If the outlet has a Google review link set up, the page also invites them to leave a Google review.



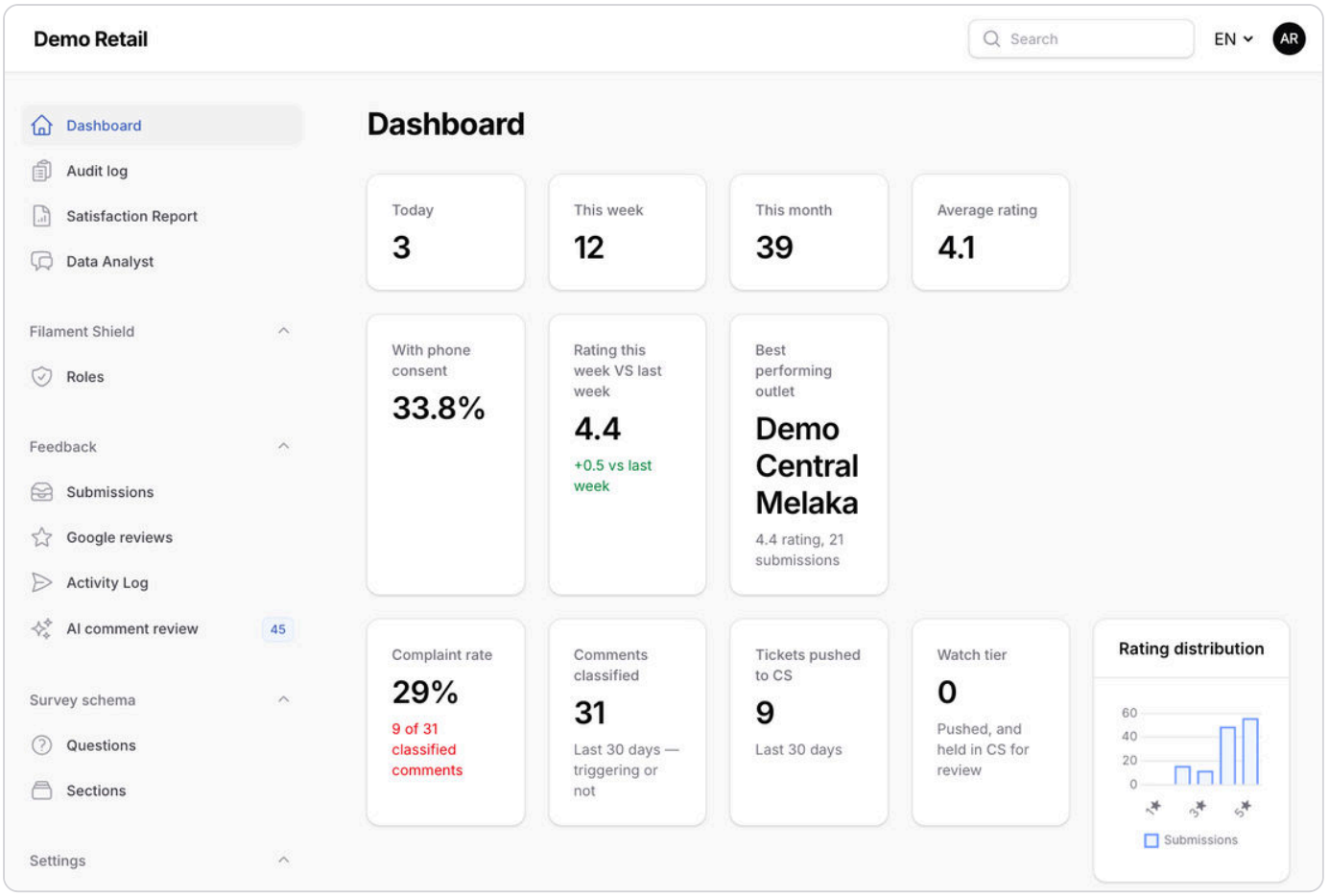
A customer who leaves before the end still counts. Their answers are kept and marked **Abandoned**.

CUSTOMER FEEDBACK

Read the dashboard

For: Everyone

Dashboard is the first screen after you sign in. You only see the outlets you are allowed to see.



- **Today**, **This week**, **This month**: how many surveys came in.
- **Average rating** and **Rating this week VS last week**: whether customers are getting happier or less happy.
- **Best performing outlet**: the outlet with the highest average rating.
- **Complaint rate**: of the comments read in the last 30 days, how many were complaints.
- **Tickets pushed to CS**: how many unhappy customers were sent to Customer service in the last 30 days.
- **Watch tier**: tickets that were sent, but that Customer service holds for checking first, for example because the same phone number sent many surveys.

Scroll down for charts: the trend over 30 days, the spread of star ratings, the score for each of the five questions, and the best and worst outlets.

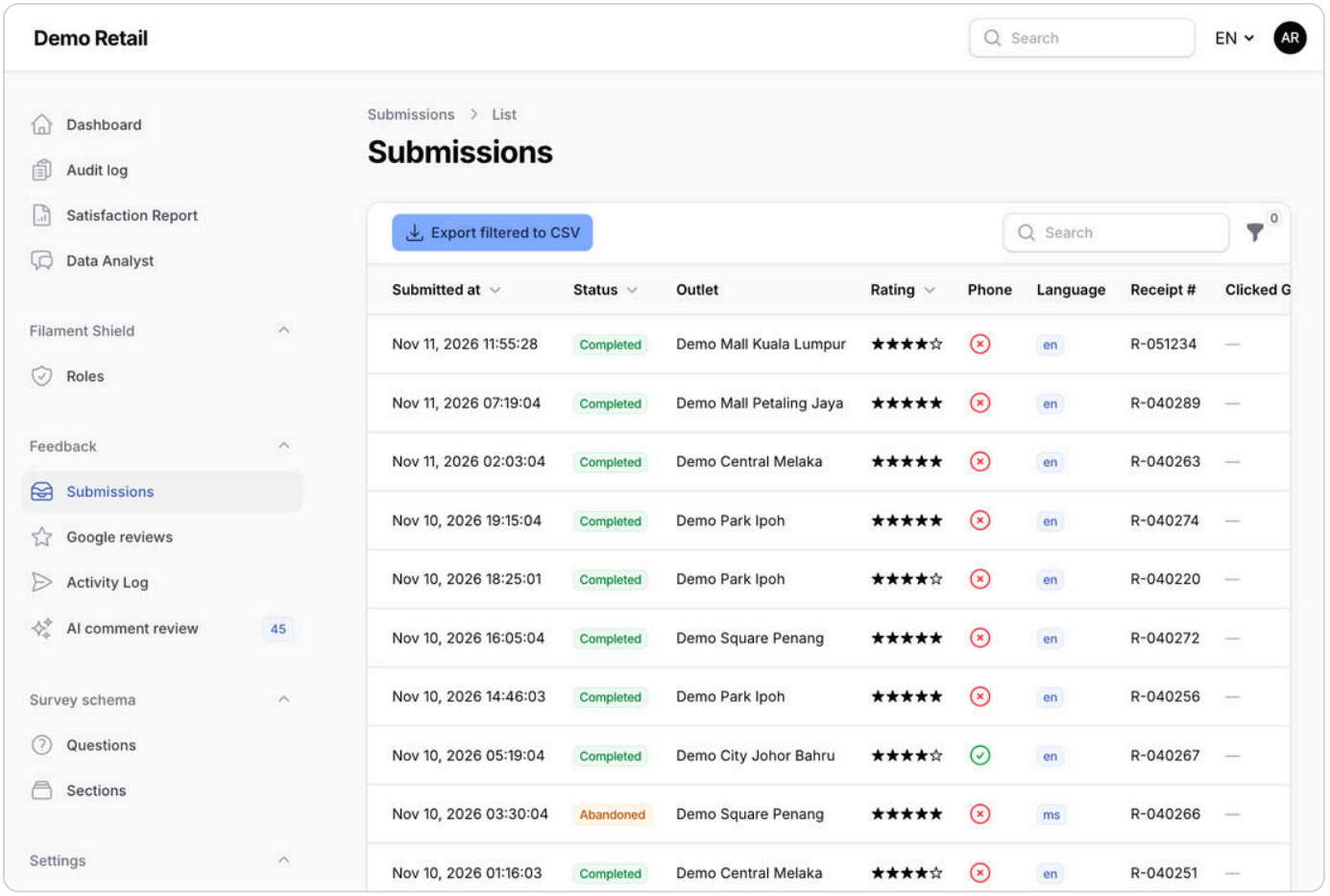
Use **EN** at the top right to switch the screens between English, Malay and Chinese.

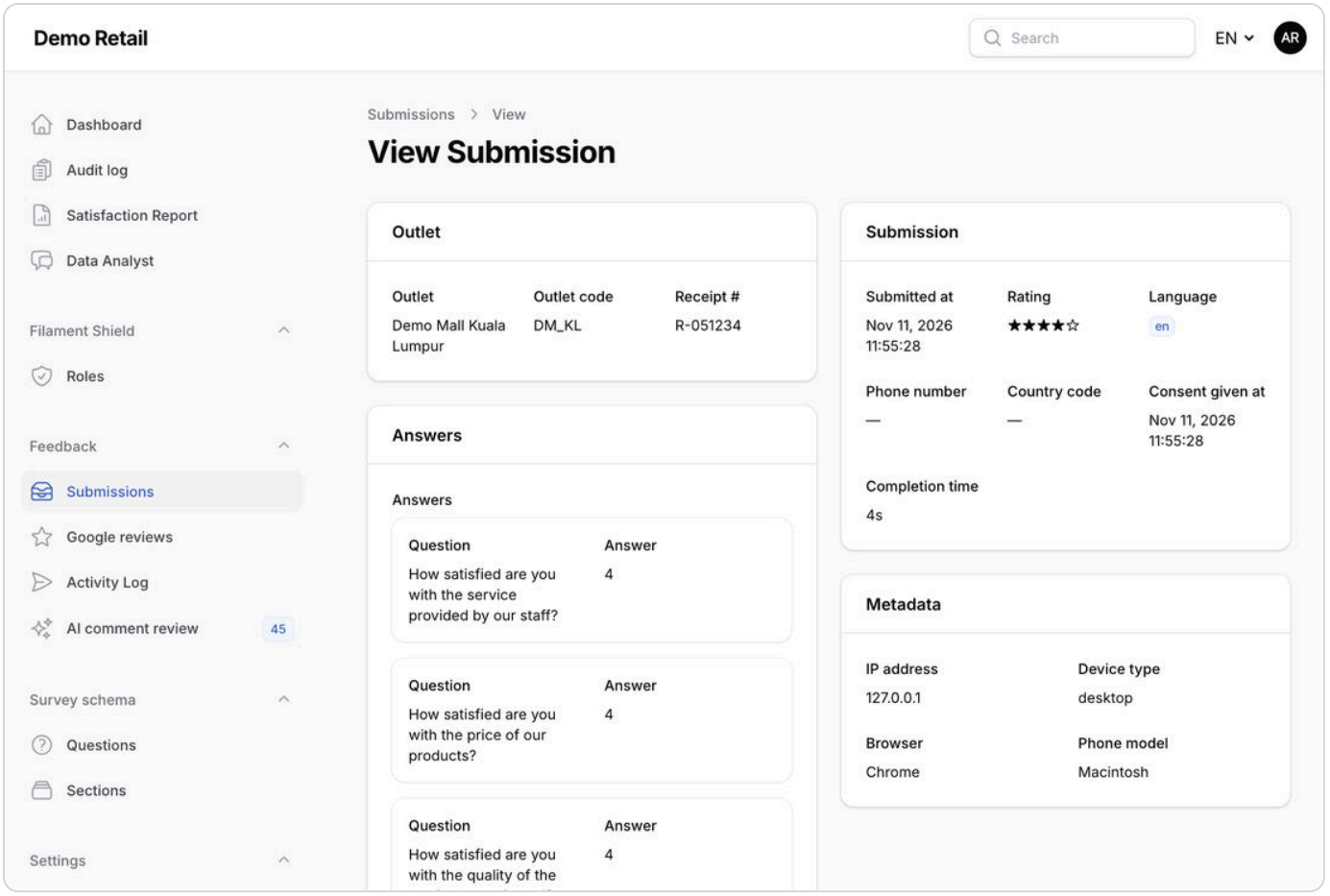
CUSTOMER FEEDBACK

Read survey answers

For: Everyone

1. Open **Submissions** under **Feedback** in the menu on the left. Each row is one customer's survey, newest first.
2. **Status** shows **Completed**, or **Abandoned** when the customer left before the end.
3. Press the filter icon above the list to narrow it by date, status, rating, language, outlet, whether the customer left a phone number, or whether they opened the Google review link.
4. Press a row to see every answer, the outlet, the receipt number and the language the customer used.





Export to a spreadsheet

Filter the list first, then press **Export filtered to CSV**. A CSV file opens in Excel or Google Sheets. One export holds at most 10,000 rows. If you reach that, narrow the filter.

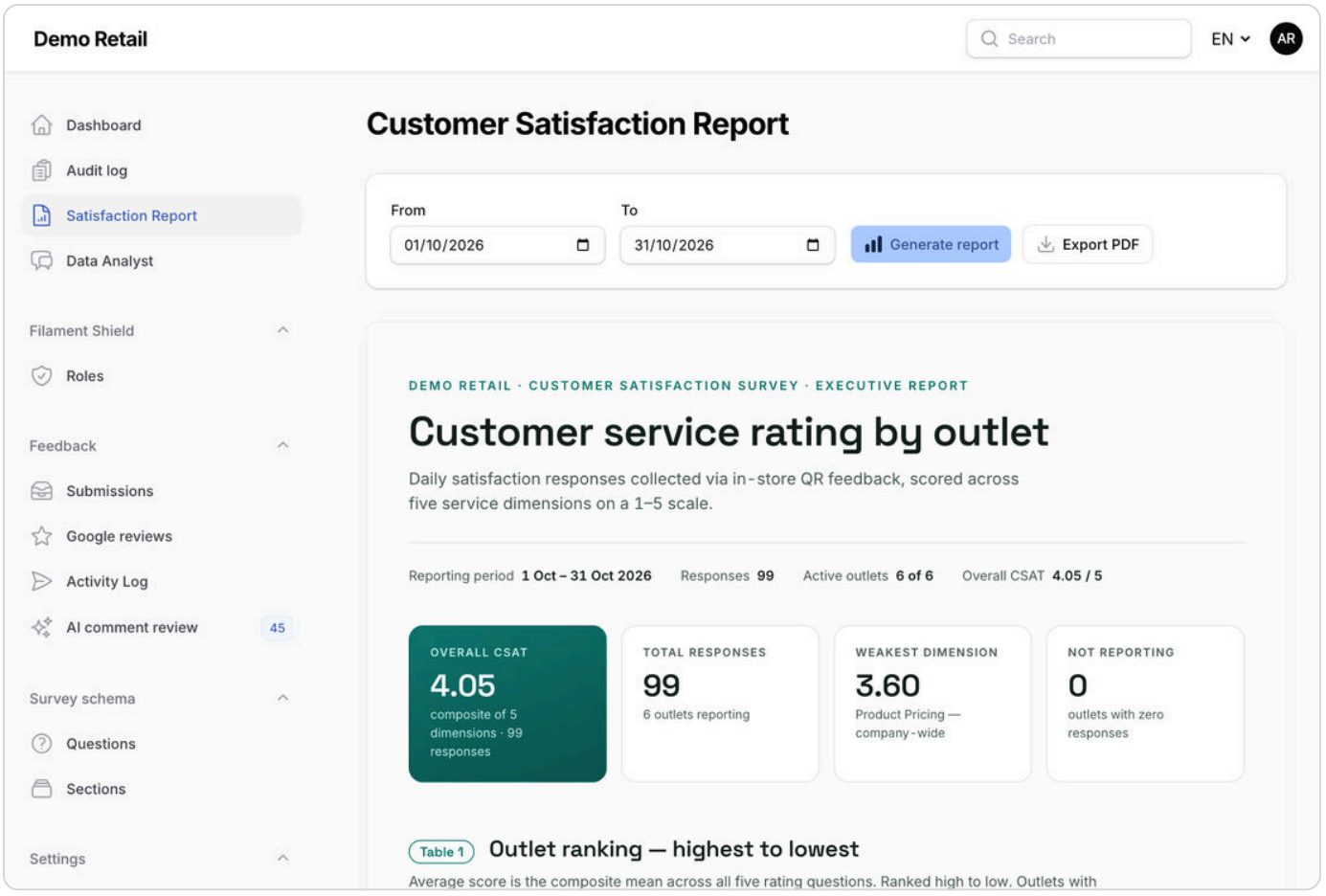
Nobody can edit or delete a survey. They are the customer's own words and stay as sent.

Make a satisfaction report

For: Everyone

The satisfaction report puts one period's results on a few pages, ranked by outlet, ready to share or print.

1. Open **Satisfaction Report** in the menu on the left.
2. Pick the **From** and **To** dates.
3. Press **Generate report**.
4. To save or send it, press **Export PDF**.



The report shows the overall score, how many surveys came in, the weakest of the five questions, the outlets with no surveys, and a ranking of every outlet from highest to lowest.

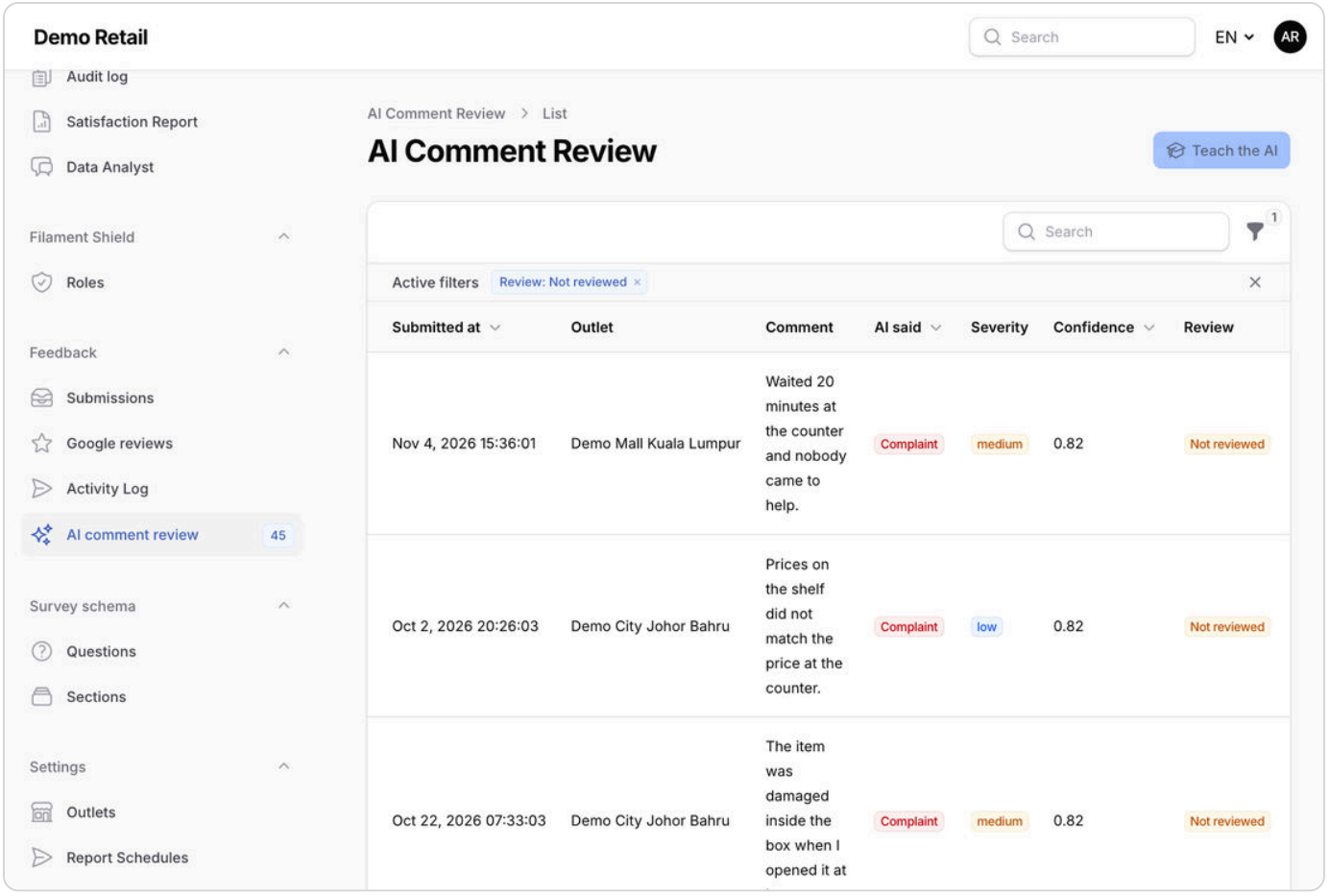
CUSTOMER FEEDBACK

Check what the AI decided about a comment

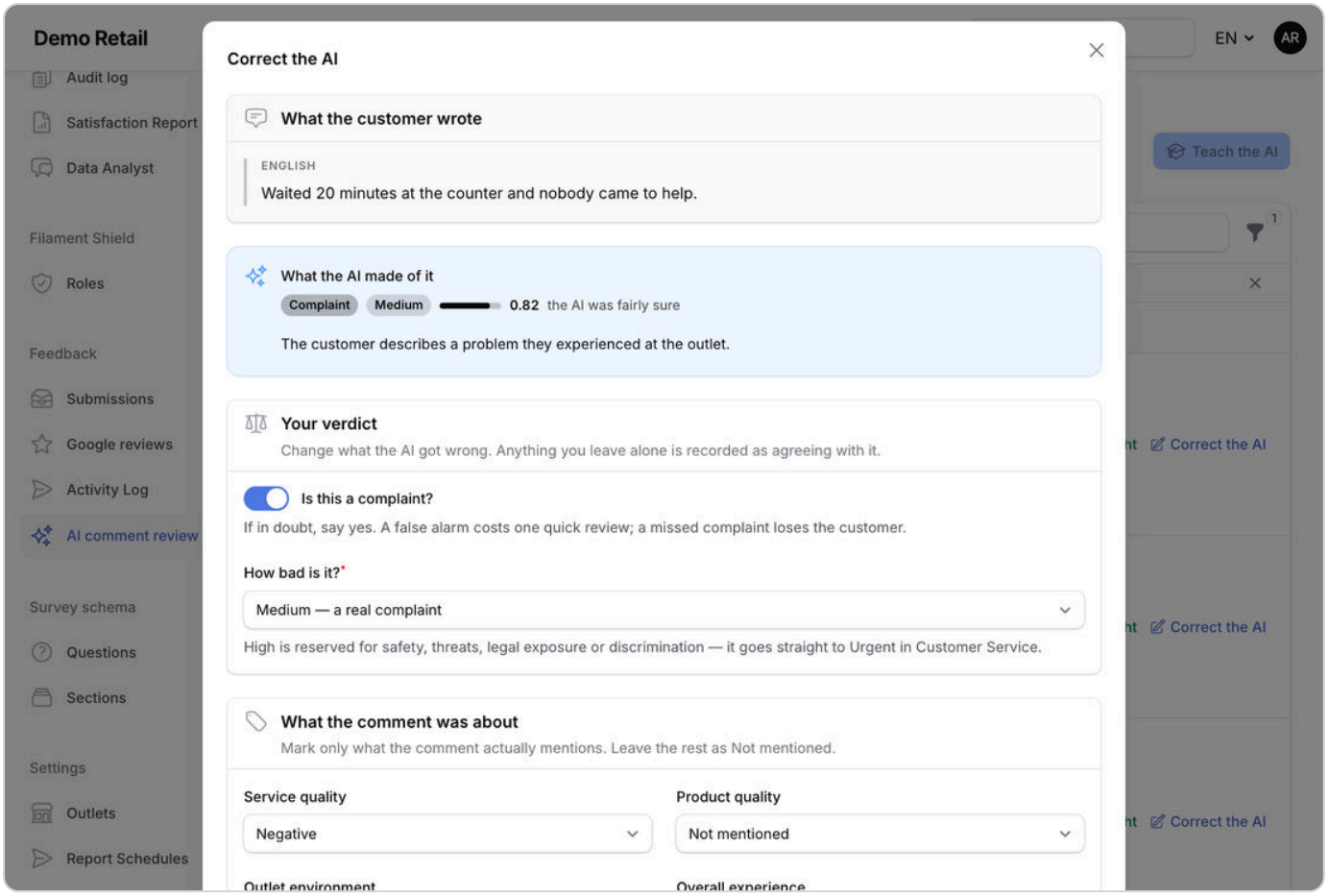
For: Admins

Every customer comment, in any language, is read by an AI (a computer program that reads text). It decides whether the comment is a complaint and how serious it is. If it is a complaint, a ticket goes to Customer service. A person should check its work.

1. Open **AI comment review** under **Feedback**. The number next to it is how many comments still need checking.
2. Read the comment, and what the AI said under **AI said**, **Severity** and **Confidence**.
3. If the AI got it right, press **AI was right**.
4. If not, press **Correct the AI**.



5. Under **Your verdict**, set **Is this a complaint?** and **How bad is it?**, and mark what the comment was about. Anything you leave alone counts as agreeing with the AI.
6. Optionally, write one line under **Why the AI was wrong (optional)**. Press **Save correction**.



Rules of thumb

- If in doubt, say it is a complaint. A false alarm costs one quick check. A missed complaint loses the customer.
- If you mark as a complaint a comment the AI missed, a Customer service ticket is raised straight away.
- **High** is only for safety, threats, legal issues or discrimination. It goes straight to **Urgent** in Customer service.
- A comment about price alone never raises a ticket.

Teach the AI

Once corrections have built up, press **Teach the AI** at the top right. The AI is re-tested against comments people have already checked, and the new version is only used if it still catches at least 90% of complaints in every language. If it fails, nothing changes. It takes a minute or two.

If the screen says **The AI is in offline mode**, comments are being read by a fixed word list instead of the AI. It cannot learn. Your corrections are still saved. Ask your administrator to switch the AI on.

CUSTOMER FEEDBACK

See which customers were sent to Customer service

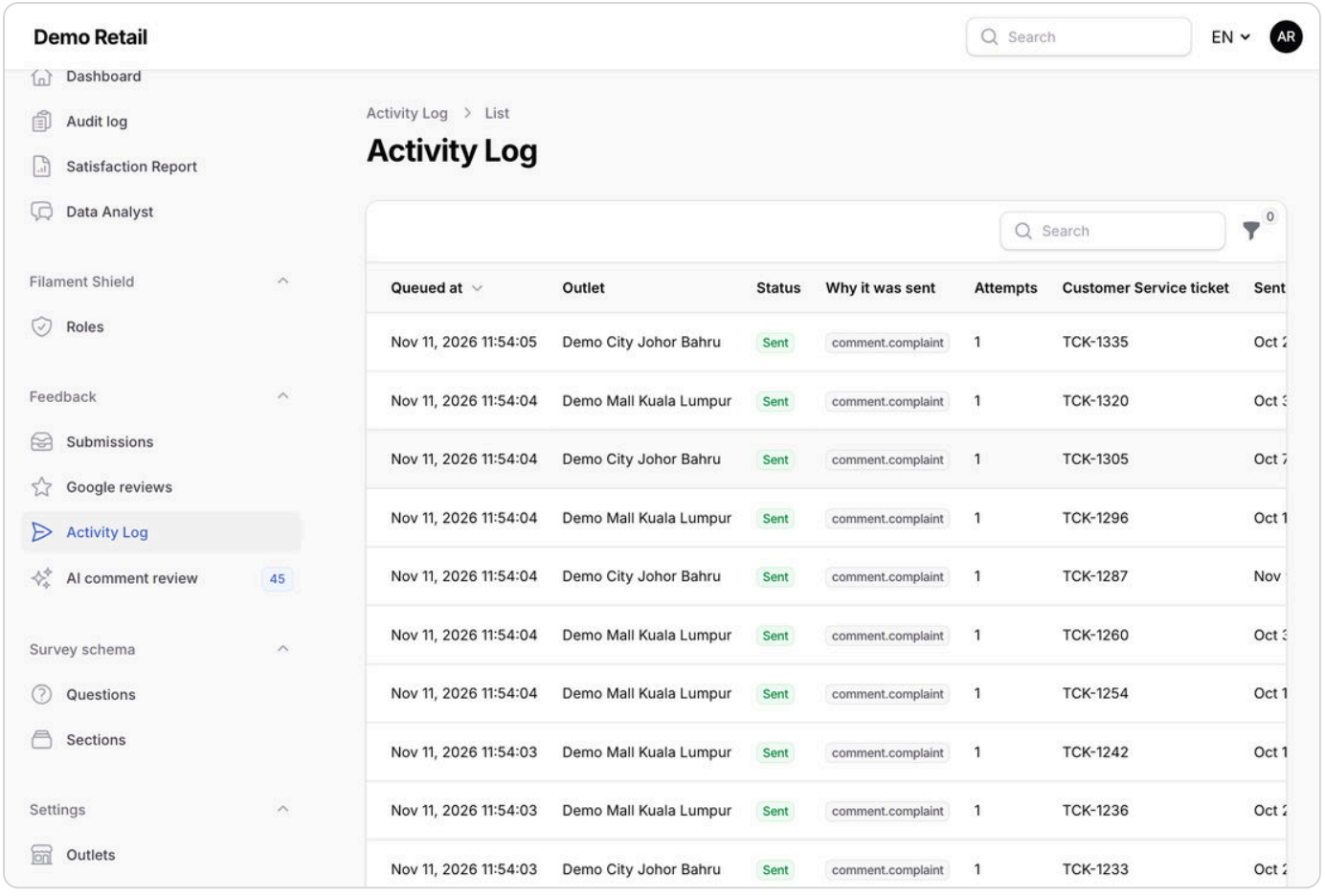
For: Admins

A survey becomes a ticket in Customer service when either:

- one of the four service scores (staff, product quality, outlet, overall) is 2 or lower, or
- the comment is read as a complaint.

A low score for price on its own never raises a ticket.

To see every ticket that was sent, open **Activity Log** under **Feedback**. Each row shows the outlet, the **Status**, **Why it was sent**, and the **Customer Service ticket** number to look up there.



If a row shows an error under **Last error**, the ticket did not reach Customer service. The module tries again on its own a few times.

Why didn't a low survey raise a ticket?

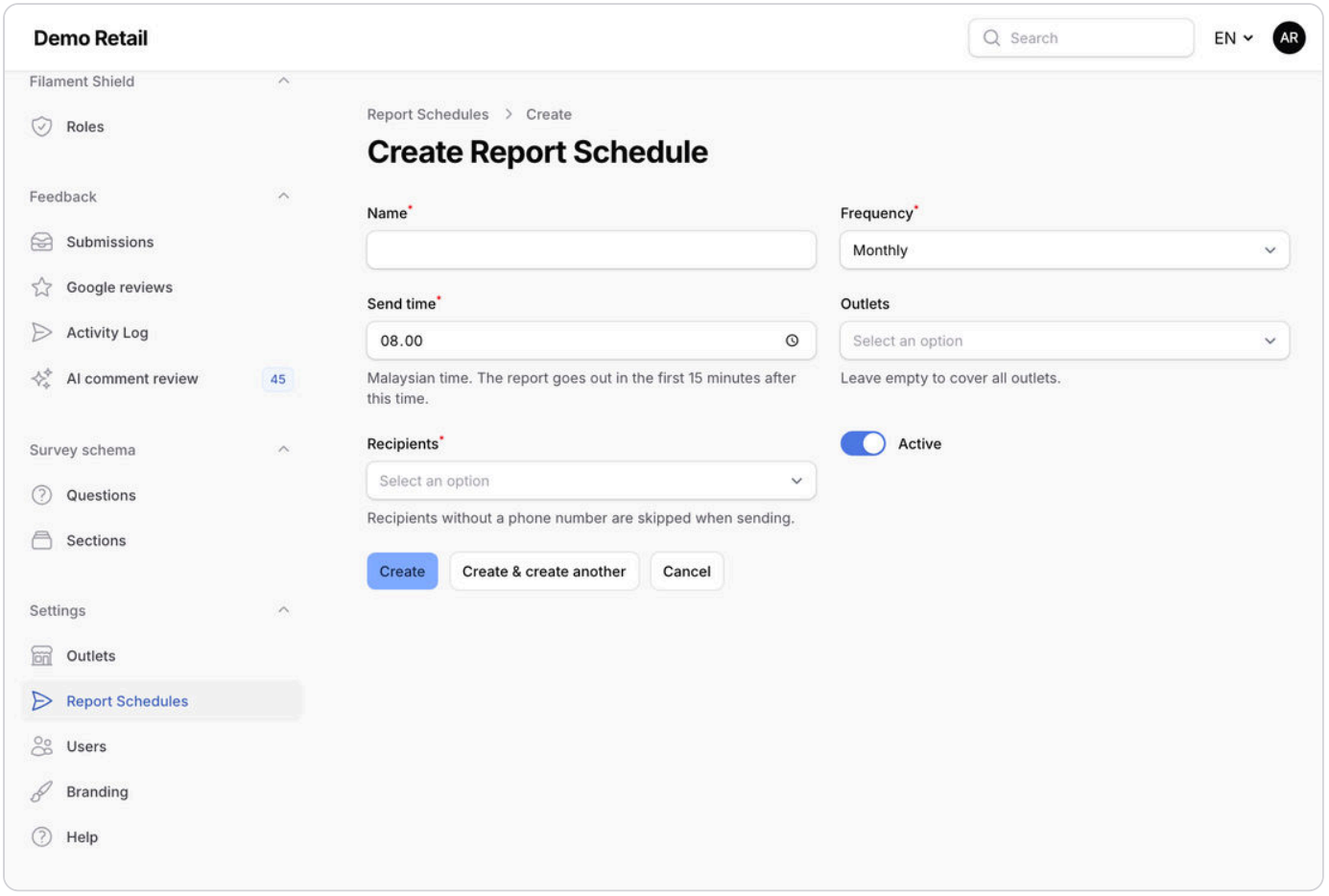
Because no service score was 2 or lower and the comment was not read as a complaint. If you think the AI missed a complaint, correct it under **AI comment review**. That raises the ticket.

Send reports automatically

For: Admins

A report schedule sends the satisfaction report to chosen people every day, week or month, by WhatsApp.

1. Open **Report Schedules** under **Settings**.
2. Press **New Report Schedule**.
3. Give it a **Name** and choose the **Frequency**: **Daily**, **Weekly** or **Monthly**.
4. Set the **Send time** (Malaysian time). The report goes out within 15 minutes after it.
5. Choose **Outlets**, or leave it empty to cover all outlets.
6. Choose the **Recipients**. A person with no phone number on their account is skipped.
7. Keep **Active** switched on and press **Create**.



To pause a schedule without deleting it, open it and switch **Active** off.

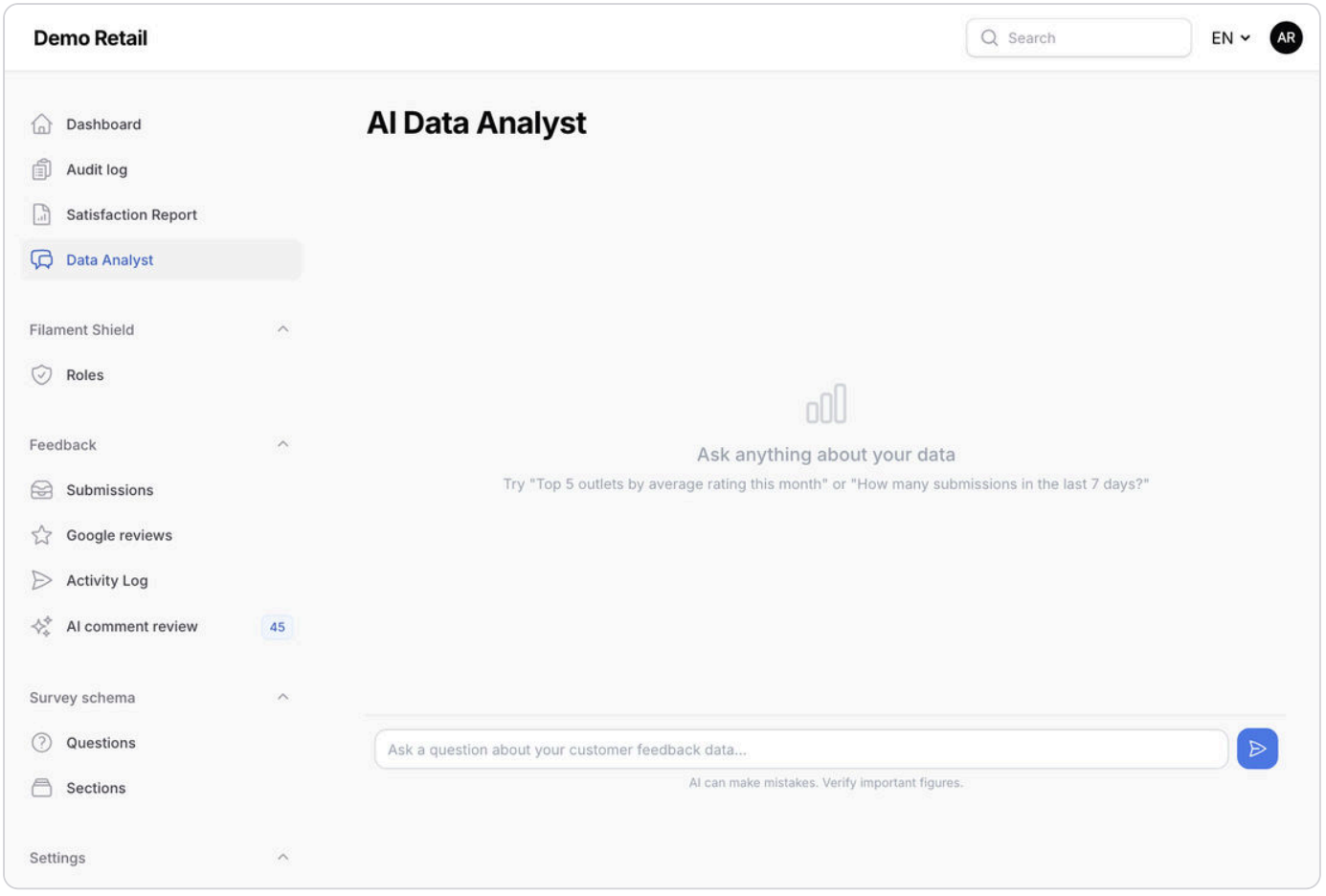
CUSTOMER FEEDBACK

Ask the Data Analyst a question

For: Super Admins

The **Data Analyst** answers questions about the feedback in everyday words, with numbers, tables or charts. It can only read the data. It cannot change anything.

1. Open **Data Analyst** in the menu on the left.
2. Type a question in the box at the bottom, for example "Top 5 outlets by average rating this month" or "How many submissions in the last 7 days?".
3. Press the send arrow.



The AI can make mistakes. Check any figure before you make a decision on it.

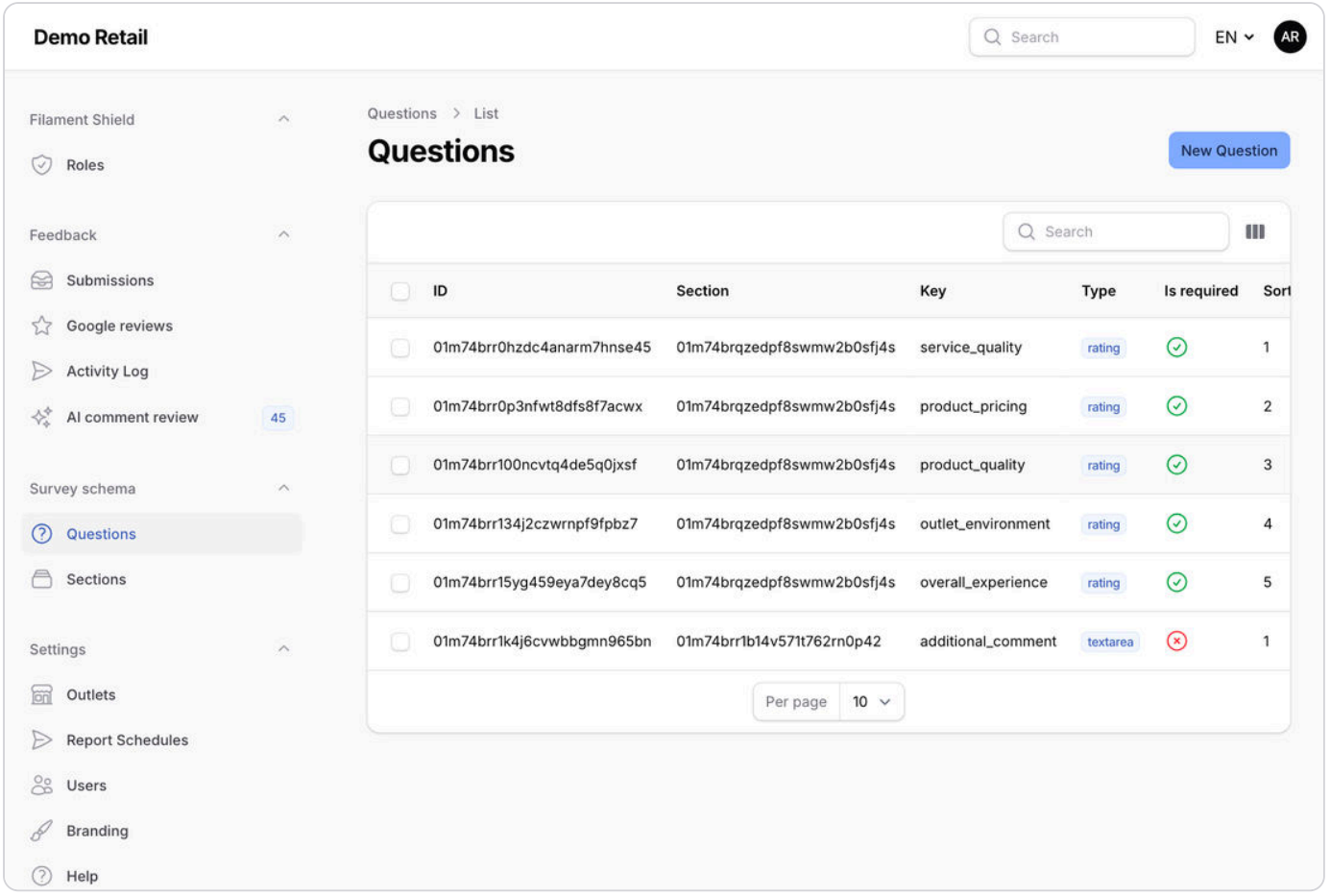
The Data Analyst needs an AI service account set up by your technical team. Without one it cannot answer. The picture above was taken on a copy without it, so no answer is shown.

Change the survey

For: Admins

The survey is made of **Sections** (the steps the customer goes through) and **Questions** inside them. Both are under **Survey schema** in the menu on the left.

1. Open **Questions**. Each question is listed with its section, its **Key** (its short code name) and its **Type**.
2. Press a question, then **Edit**.
3. You can change its section, whether it is **Required**, its **Sort order** (its place in the step), its **Type**, and the lowest and highest score or the longest answer allowed.
4. Press **Save changes**. Customers see the change straight away.



What you cannot change here

- **The wording of a question** is not on this screen. It is kept in the module's language files, in English, Malay and Chinese. Ask your technical team to change it.

- **Do not change the Key of an existing question.** The dashboard and reports find each question by its key, so they would stop counting it.

CUSTOMER FEEDBACK

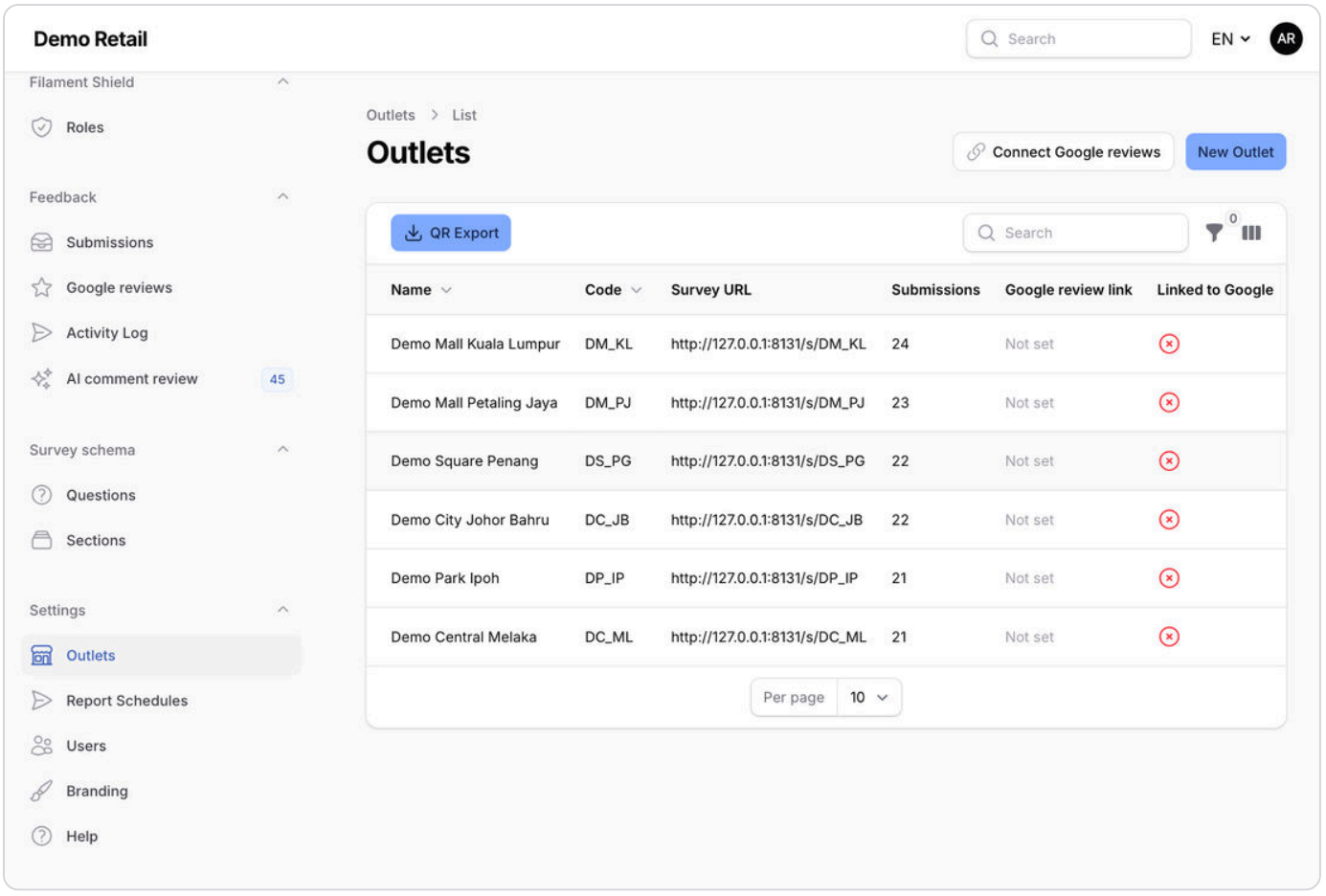
Add outlets and print their QR codes

For: Super Admins

Every outlet has its own survey address and QR code, so every survey is tied to the right outlet.

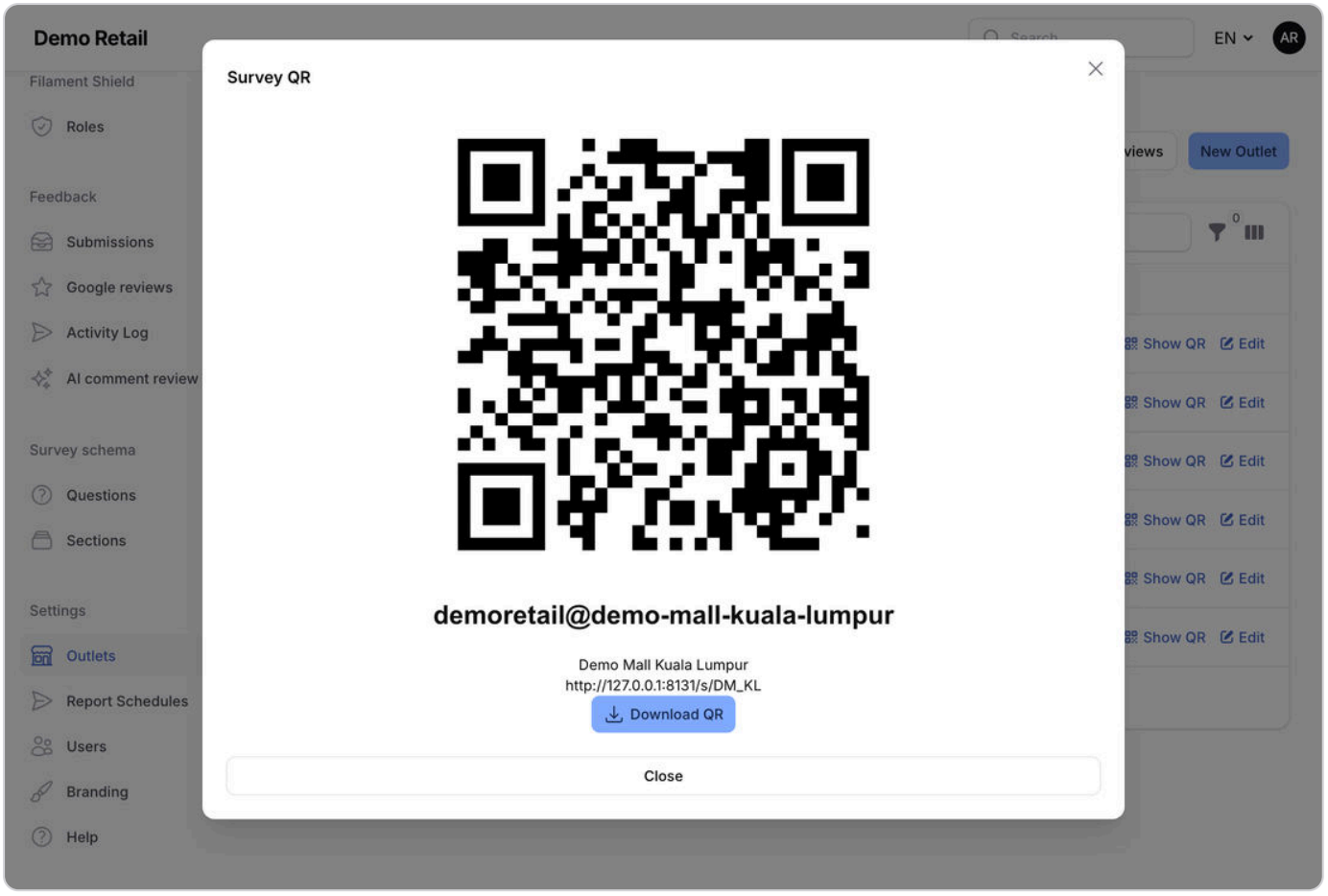
Add an outlet

1. Open **Outlets** under **Settings**.
2. Press **New Outlet**.
3. Fill in the **Name** and a short **Code**. The code becomes part of the survey address, so pick one that will not change.
4. To invite happy customers to review you on Google, paste the outlet's **Google review link**. Leave it empty to hide that invitation.
5. Press **Create**.



Print a QR code

1. On the outlet's row, press **Show QR**.
2. Press **Download QR** and print it on a counter stand or a receipt.



To get every outlet's code at once, press **QR Export** at the top of the list. It downloads a spreadsheet of all outlets and their QR codes.

To stop an outlet collecting surveys, open it with **Edit** and switch **Active** off.

Google reviews

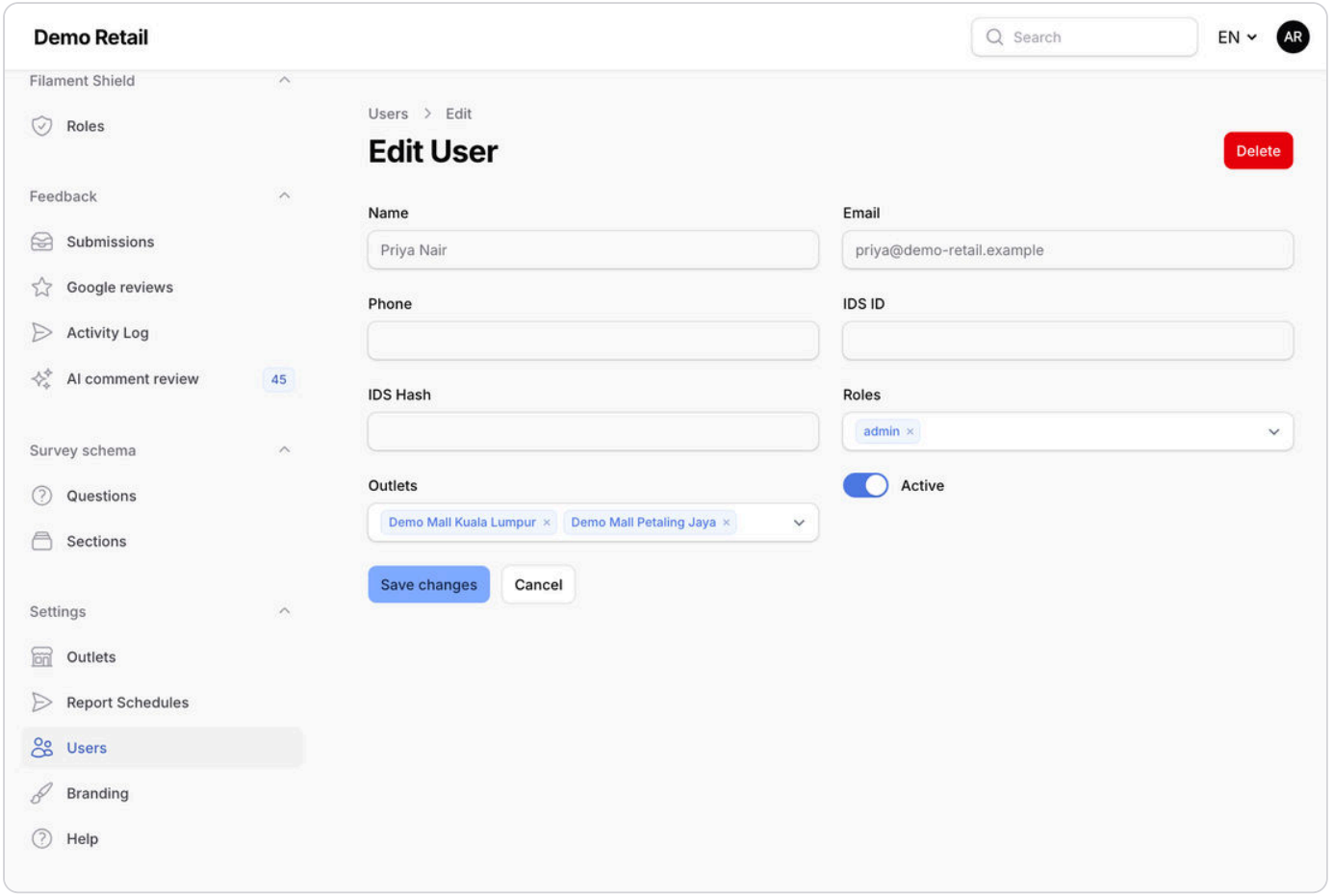
If your company has connected its Google Business Profile with **Connect Google reviews**, reviews for each outlet that has a **Google location ID** are pulled in and shown under **Google reviews**. Each new review is also sent to Customer service as a ticket. Your technical team can limit this to low-star reviews only. Google reviews are switched off until your technical team turns them on.

Give people access

For: Super Admins

People appear under **Users** after they first sign in. Until they are given a role, they see **Account waiting for role**.

1. Open **Users** under **Settings**.
2. On the person's row, press **Edit**.
3. Under **Roles**, choose **super_admin**, **admin** or **auditor**. What each one can do is listed on What it is for.
4. Under **Outlets**, choose the outlets this person should see. A Super Admin sees every outlet anyway.
5. Press **Save changes**.



When someone leaves, press **Revoke all access** on their row. It removes every role at once.

Change what a role can do

Open **Roles** under **Filament Shield**, open the role, and tick or untick what it may do.

See who changed what

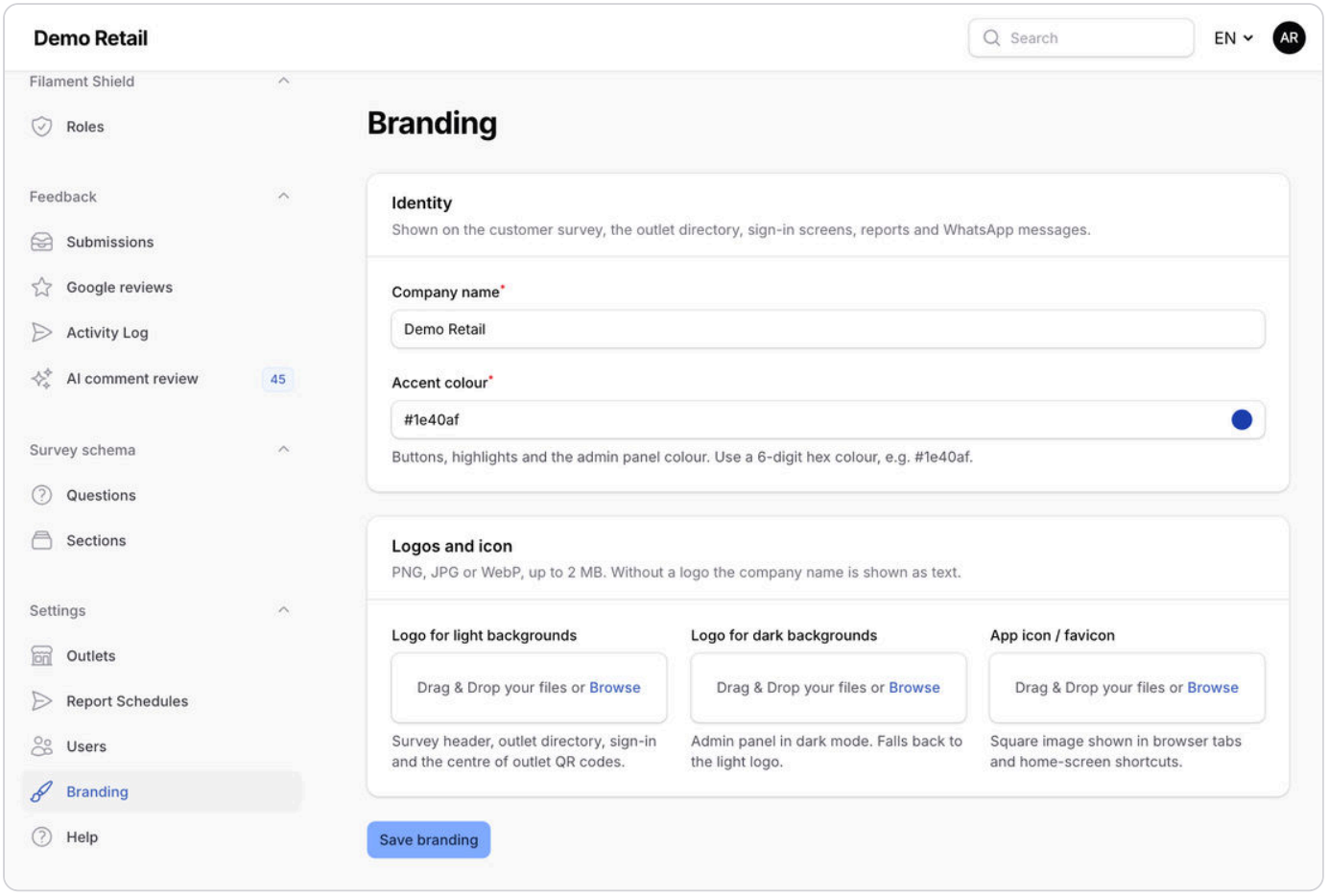
Audit log in the menu on the left lists every change made here, and every page an administrator opened, with who did it and when.

Set your company name and logo

For: Admins

The name and logo appear on the customer survey, the sign-in screen, reports, the WhatsApp messages and in the middle of outlet QR codes.

1. Open **Branding** under **Settings**.
2. Type the **Company name**.
3. Set the **Accent colour**, the colour of buttons and highlights, as a 6-digit colour code such as `#1e40af`.
4. Upload the **Logo for light backgrounds**, and if you have one, the **Logo for dark backgrounds** and the **App icon / favicon** (the small picture in the browser tab). PNG, JPG or WebP, up to 2 MB each. Without a logo, the company name is shown as text.
5. Press **Save branding**.



USER GUIDE · VERSION 1

vKad name card

A shareable digital card for staff and management, linking to catalogue, booking and feedback.

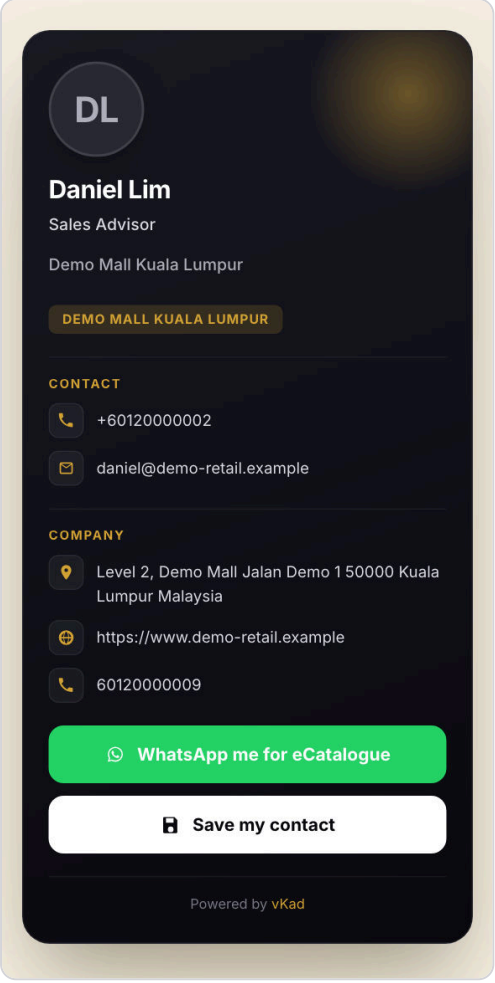
1. What vKad is for
2. Add your company details
3. Create your card
4. Share your card
5. Change your card
6. Link an NFC card
7. See who asked for your catalogue
8. Add people to your account
9. Make cards for many staff at once

What vKad is for

For: Everyone

vKad gives each salesperson or manager a digital name card: a web page with their name, job title, phone, email, company address and website. Customers open it by scanning a QR code, tapping an NFC card (a card with a chip that opens a link when held against a phone) or following a link. From the card a customer can save the person's contact to their phone, or ask for the product catalogue on WhatsApp. Each catalogue request shows up as a lead (a customer who asked to hear from you) in the **Leads** list.

The screen names four roles. **Account User** makes and shares their own cards and sees their own leads. **Account Admin** can also add people, import cards for many staff at once and see everyone's leads. **Account Owner** can do all of that and manages the plan under **Billing & Plan**. **Account Finance** sees billing and can view cards, but cannot make them.



What vKad needs:

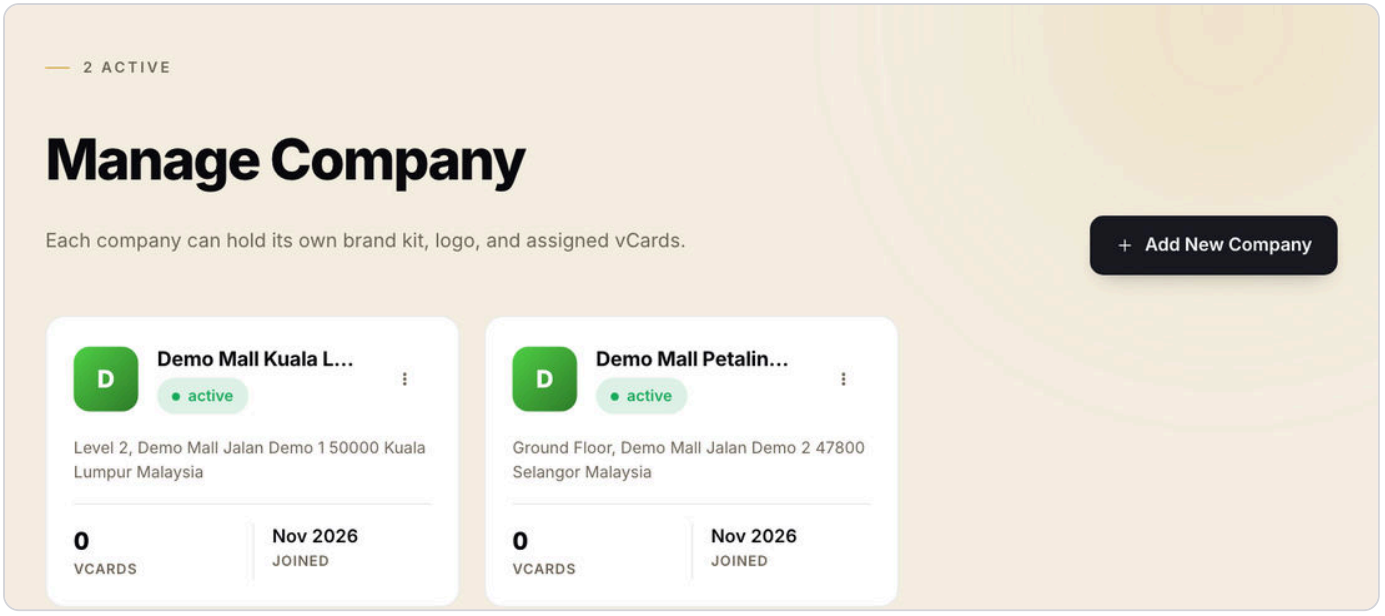
- You sign in with your IDS account (your phone number and password). Someone with **Account Owner** or **Account Admin** must invite you first.
- Your account needs an active plan. The plan sets how many cards you can make; the number shows at the top of **My vCards** (for example "0 / 15 vCards"). Without an active plan, vKad sends you to a payment page instead of letting you create cards.
- Sending the catalogue on WhatsApp uses an outside messaging service that your company's administrator sets up. If it is not set up, requests are still listed under **Leads**, but no WhatsApp message goes out.

Add your company details

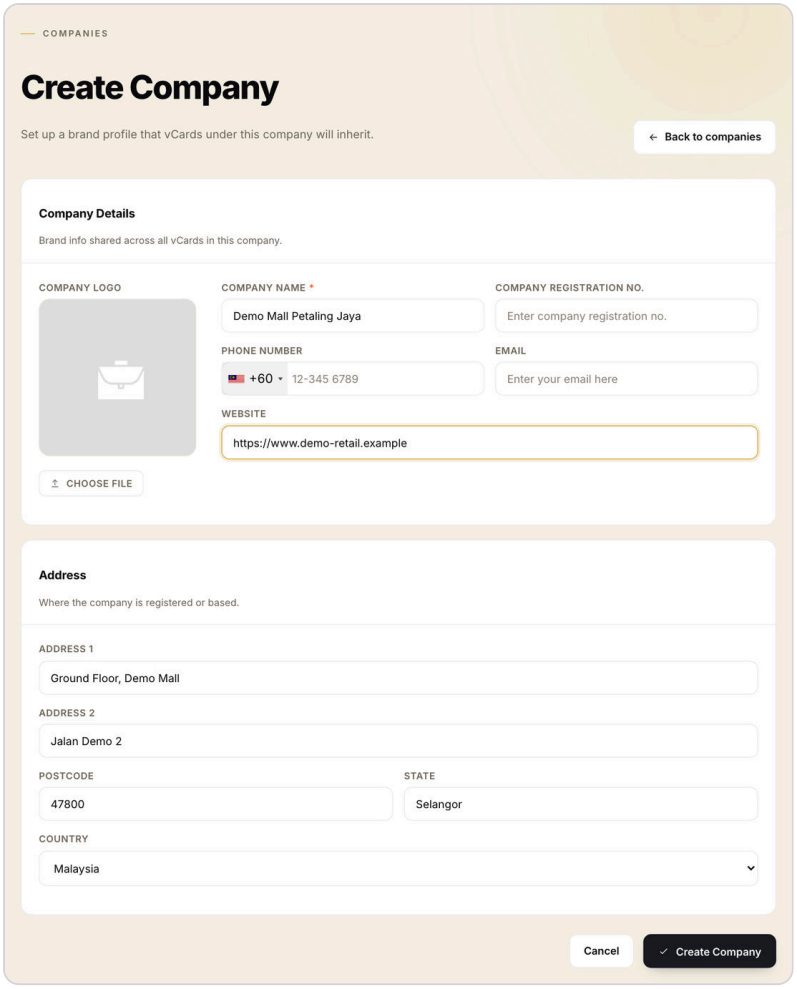
For: Account Owner, Account Admin, Account User

Every card must belong to a company. The company gives the card its address, website and logo, so you type them once and every card under that company shows them. Check here first: your company may already be set up.

1. Open **Companies** in the menu on the left. You see one tile per company.
2. If your outlet or company is missing, press **Add New Company**.



3. Fill in **Company Name**. It is the only field you must fill.
4. Add the rest if you have it: **Company Logo** (press **Choose file**), **Phone Number**, **Email**, **Website**, and the address under **Address**.
5. Press **Create Company** at the bottom.

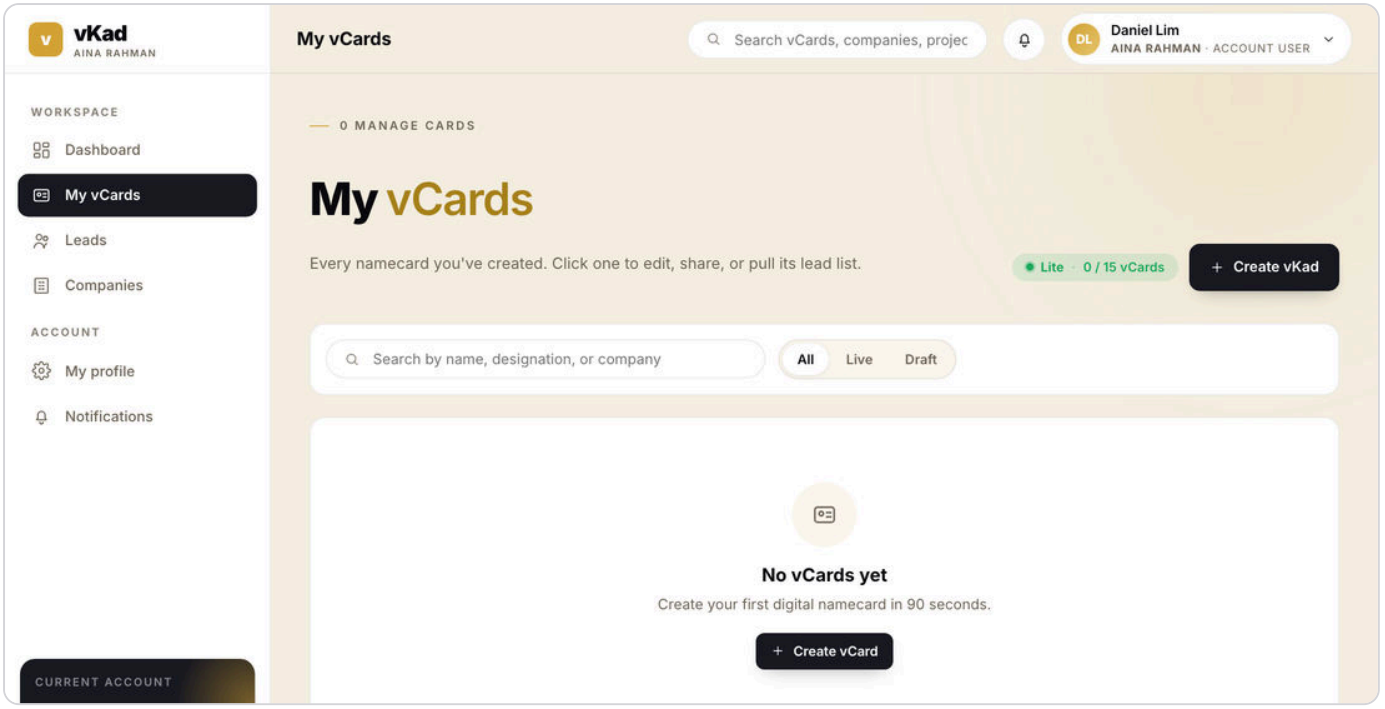


The address and website you enter here show on every card that uses this company. To change them later, press the three dots on the company's tile and choose **Edit**.

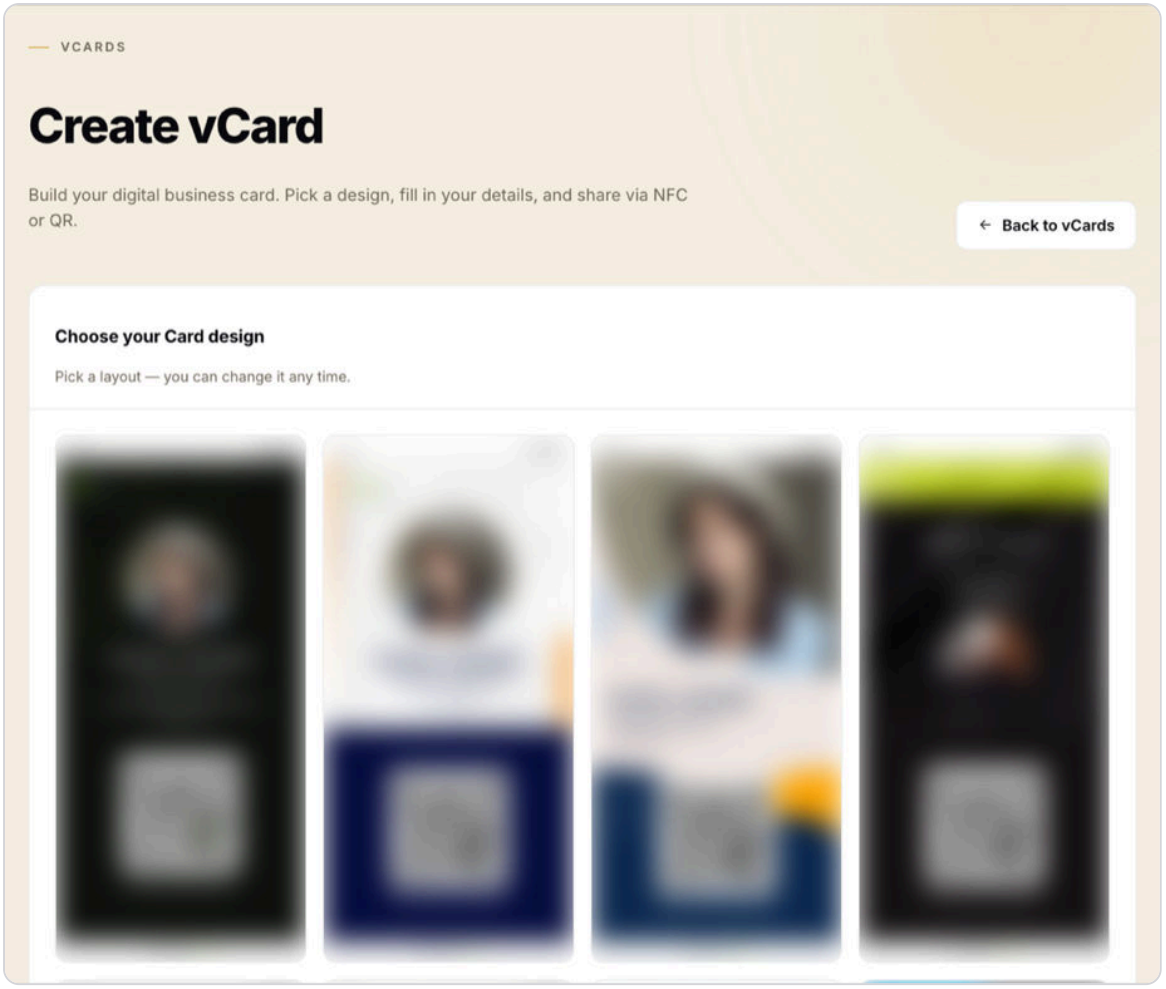
Create your card

For: Account Owner, Account Admin, Account User

1. Open **My vCards** in the menu on the left.
2. Press **Create vKad** at the top right (or **Create vCard** in the middle if you have no cards yet).

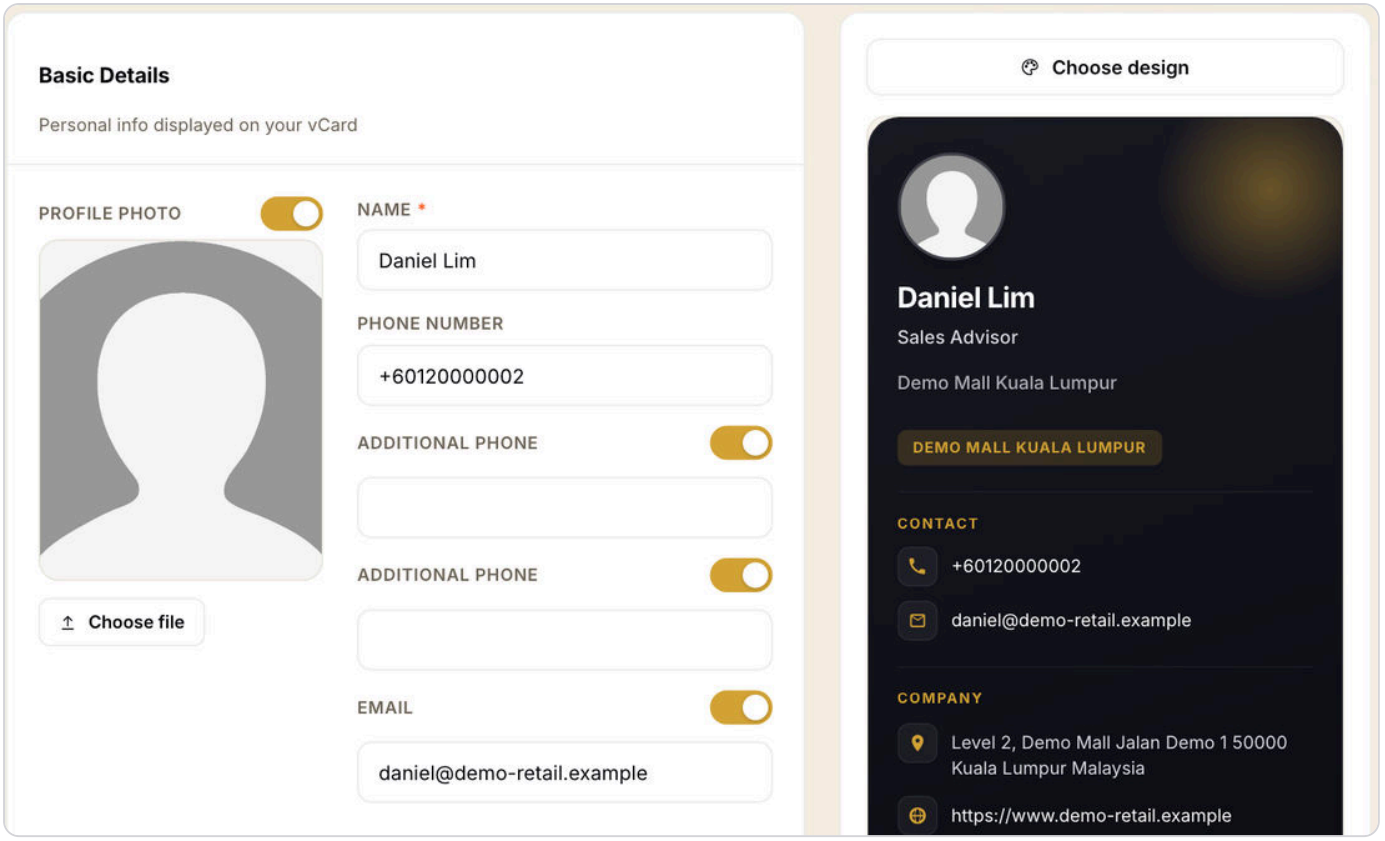


3. Pick a design by pressing on it. You can change it later.

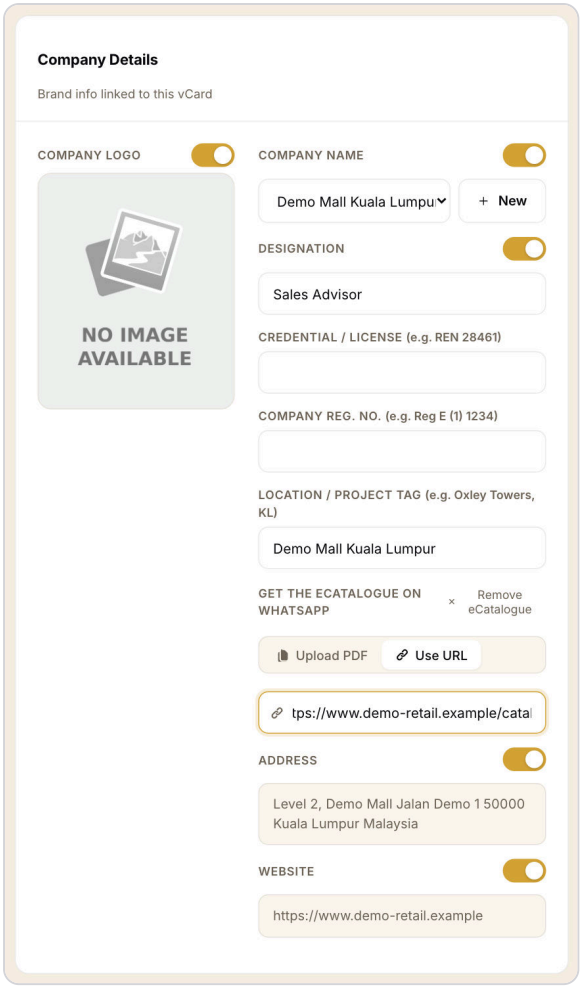


4. Under **Basic Details**, fill in **Name** and **Phone Number**. Type the phone number with the country code and digits only, no spaces or dashes: +60120000002.
5. Fill in **Email** if you want it on the card. Use a real address: vKad checks that the part after the @ exists, and refuses the card if it does not.
6. To add a photo, press **Choose file**. The example here has no photo, so the card shows the person's initials.
7. Each switch next to a field shows or hides that field on the card. Leave a switch on to show the field.

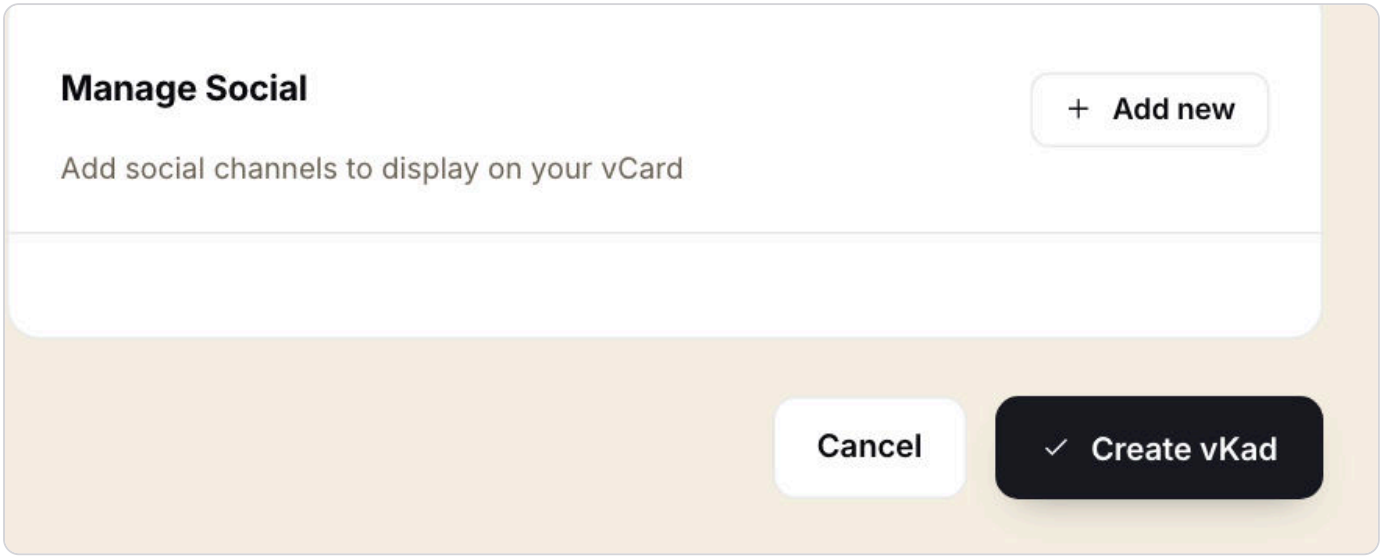
The card on the right updates as you type, so you can see what customers will see.



8. Under **Company Details**, choose your company from the **Company Name** list. If it is not there, press **New** to add it on the spot. The address and website fill in from the company.
9. Fill in **Designation** (your job title). **Credential / License**, **Company Reg. No.** and **Location / Project Tag** are optional; the tag shows as a small label on the card.
10. To let customers ask for your catalogue on WhatsApp, go to **Get the eCatalogue on WhatsApp**. Press **Upload PDF** to add a PDF file, or **Use URL** to paste a link to one. A link must end in .pdf.



11. Under **Manage Social** you can press **Add new** to put social media links on the card.
12. Press **Create vKad** at the bottom.



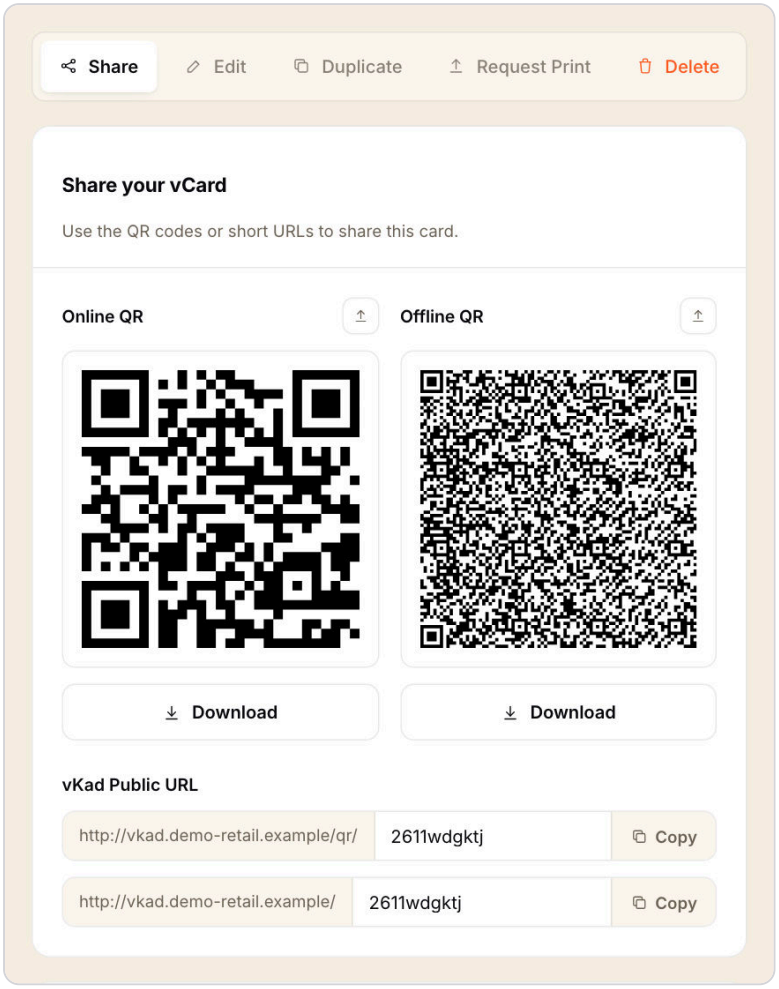
vKad opens the new card's **Manage Card** page, where you can share it straight away.

If your account has used up its card limit, vKad says "You have reached the maximum number of vKad cards for your plan." Ask your **Account Owner** to raise the plan.

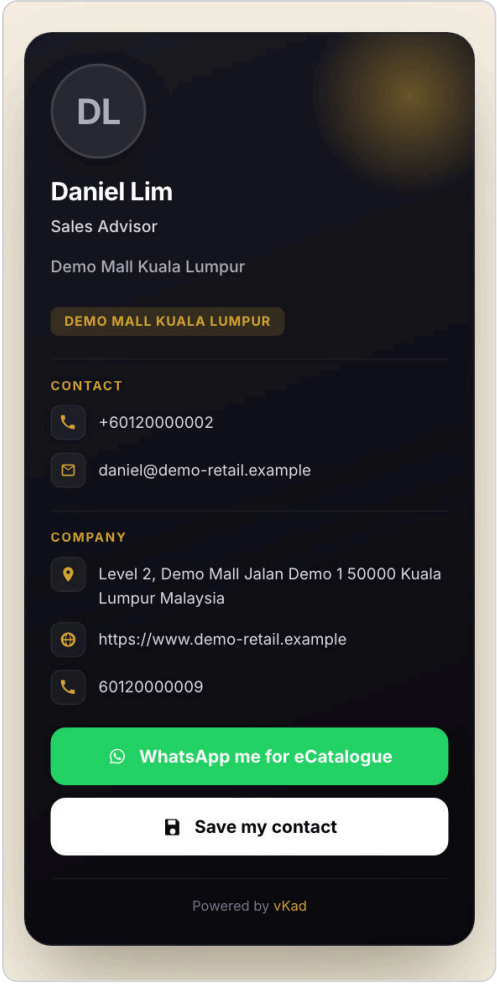
Share your card

For: Account Owner, Account Admin, Account User

1. Open **My vCards** and press your card. The **Manage Card** page opens on the **Share** tab.
2. Choose how to share:
    - **Online QR**: a QR code that opens your card's web page. The page always shows your latest details.
    - **Offline QR**: a QR code that holds your contact details inside the code itself. A phone can save the contact from it without internet. A copy you already downloaded or printed keeps the old details, so download it again after you change the card.
    - Press **Download** under a QR code to save it as a picture for a poster, counter stand or email signature.
    - Under **vKad Public URL**, press **Copy** next to a link to copy it, then paste it into a WhatsApp chat or email.

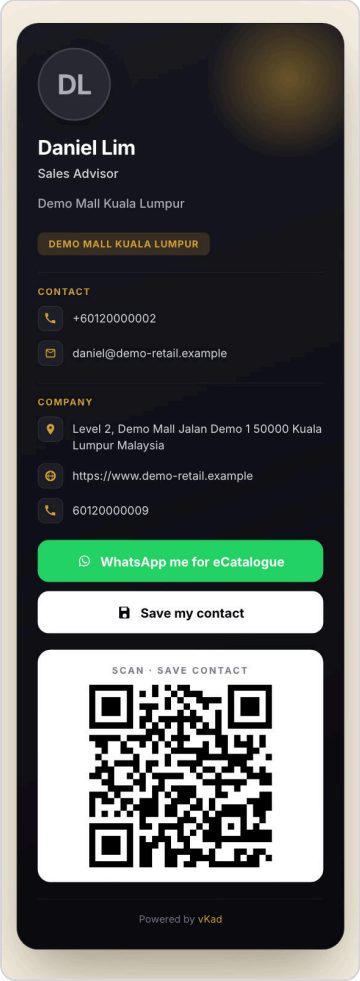


The second link (without /qr/) opens the card itself. This is what a customer sees on their phone:



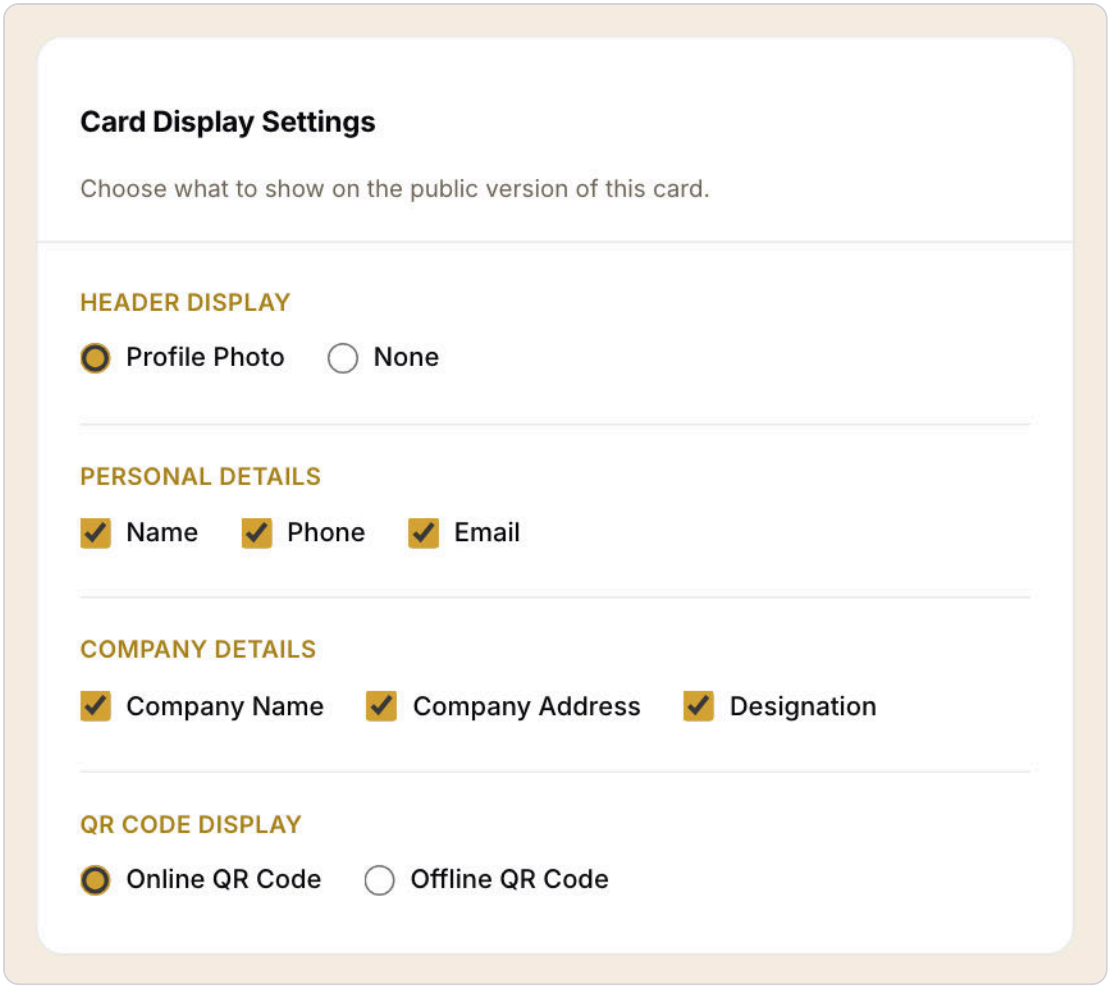
- **Save my contact** downloads your details as a contact file the phone can save.
- **WhatsApp me for eCatalogue** shows only if you added a catalogue. See "See who asked for your catalogue".

The first link (with /qr/) opens the same card with a QR code at the bottom. Open it on your own phone and hold it up for a customer to scan.



Choose what the /qr/ page shows

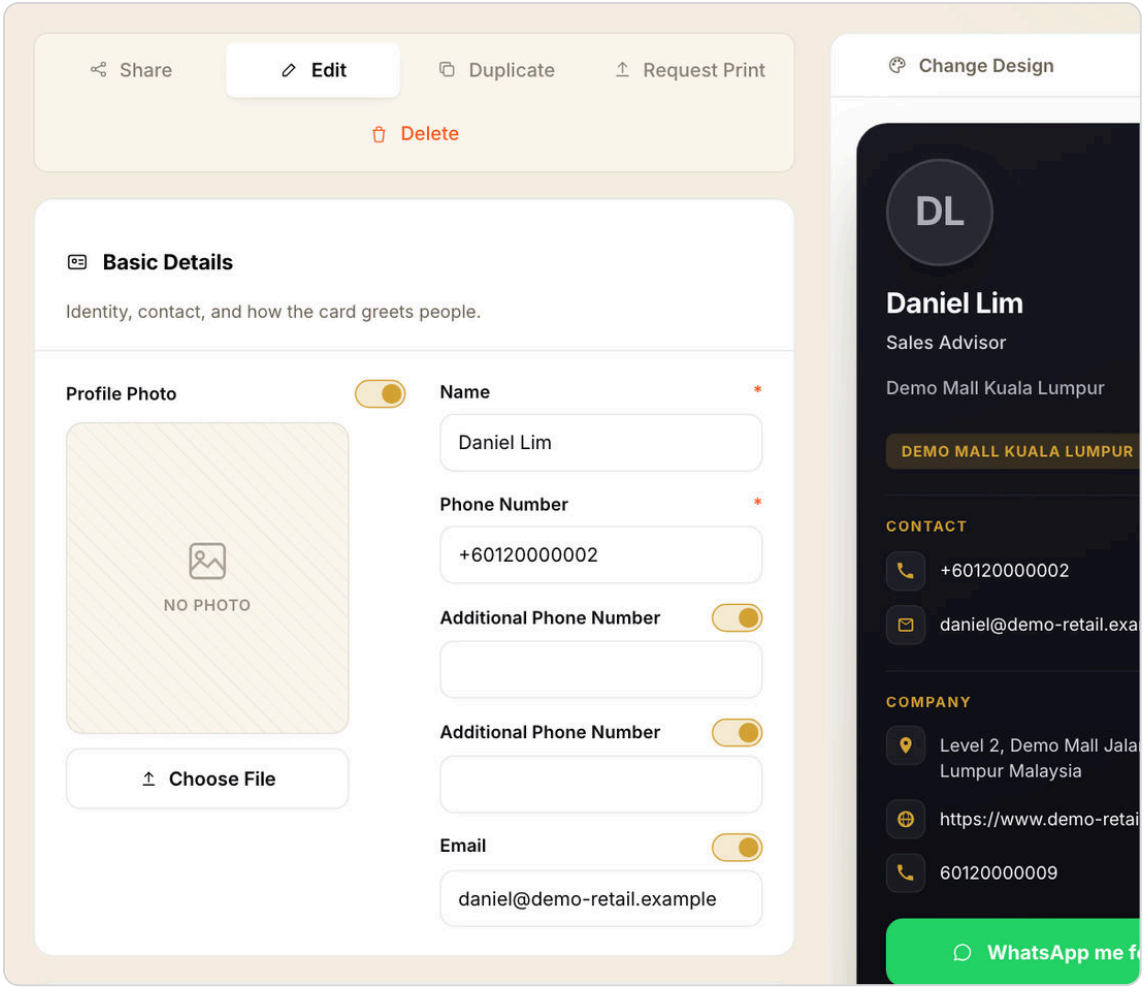
Further down the **Share** tab, **Card Display Settings** controls the /qr/ page: show your photo or not, which personal and company details to show, and whether its code is the **Online QR Code** or the **Offline QR Code**. Changes save as soon as you tick or untick. These settings do not change the normal card link.


Card Display Settings
Choose what to show on the public version of this card.
HEADER DISPLAY
Profile Photo
None
PERSONAL DETAILS
Name
Phone
Email
COMPANY DETAILS
Company Name
Company Address
Designation
QR CODE DISPLAY
Online QR Code
Offline QR Code

Change your card

For: Account Owner, Account Admin, Account User

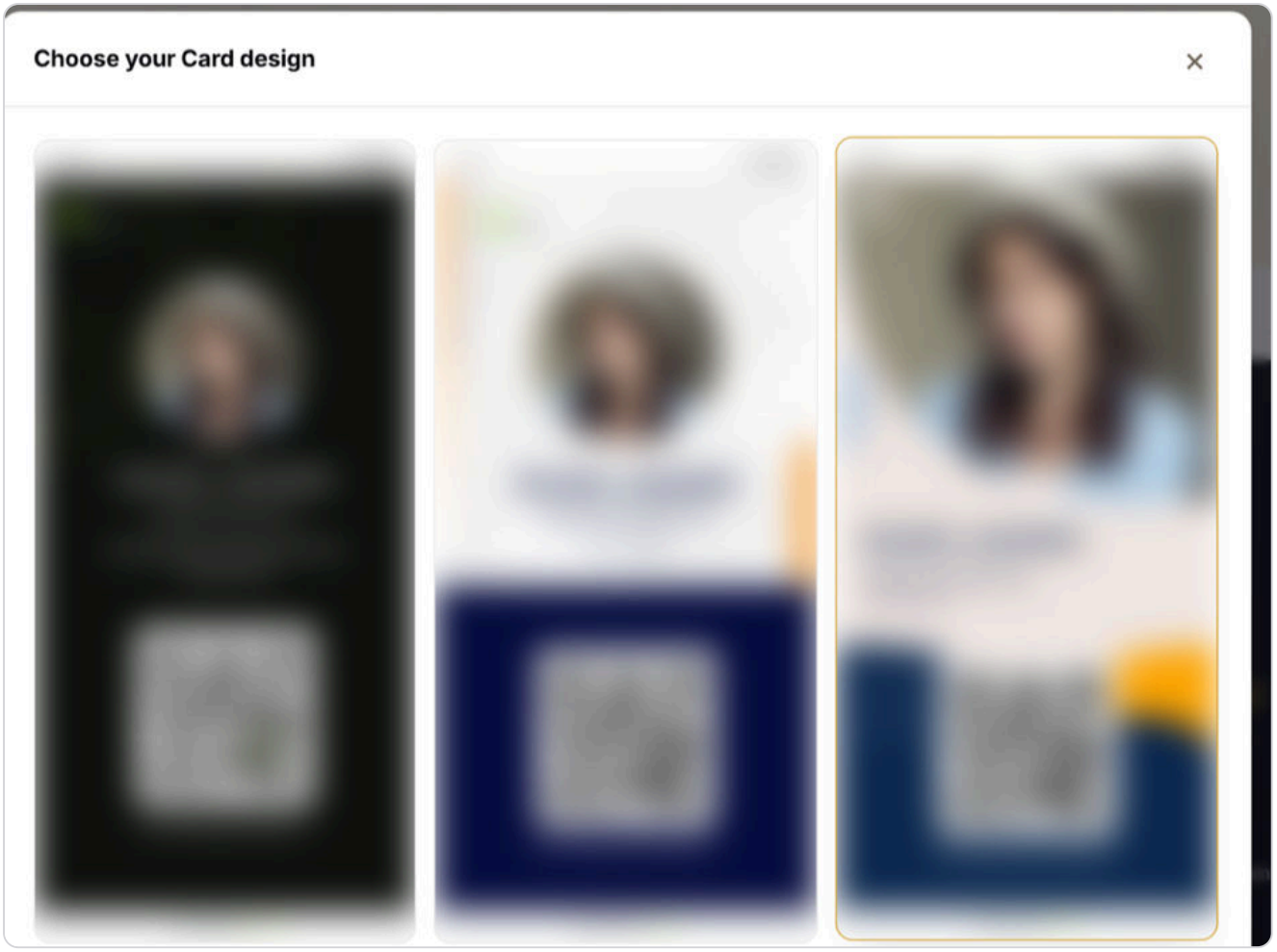
1. Open **My vCards** and press your card.
2. Press the **Edit** tab.
3. Change any field. There is no save button: each change saves on its own a moment after you stop typing, and the card on the right updates.
4. Use the switch next to a field to hide it from the card, or show it again.



If a change does not stick, check the **Email** field. vKad refuses changes while the email address is not a real one.

Change the design

1. On the **Manage Card** page, press **Change Design** above the card preview.
2. Press the design you want. Your details stay the same; only the look changes.

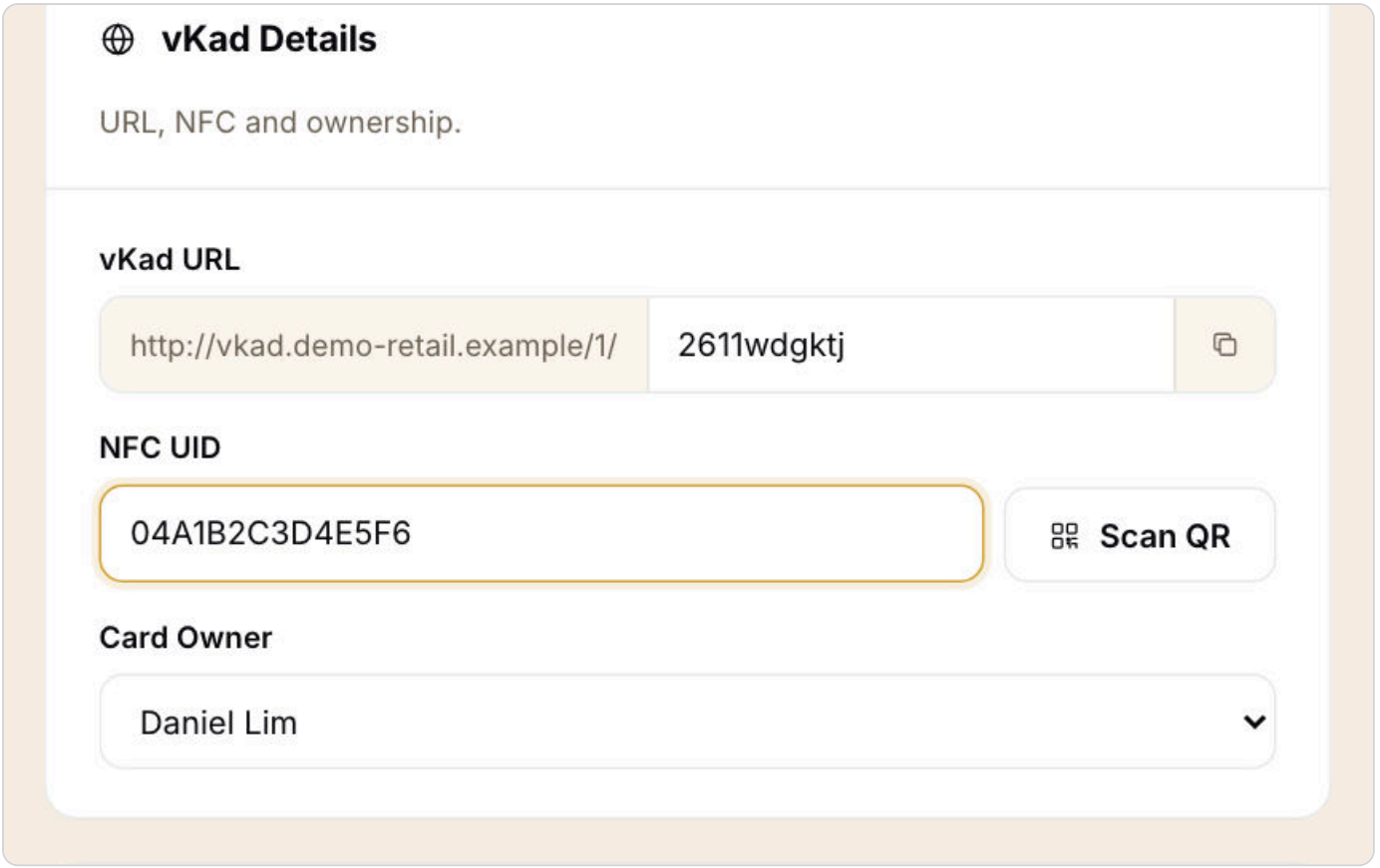

Choose your Card design

Link an NFC card

For: Account Owner, Account Admin, Account User

An NFC card is a plastic card with a chip. When a customer holds it against their phone, the phone opens your vKad card. Each NFC card has its own code, called the NFC UID, printed or shown as a QR code on the card. Linking tells vKad which card is yours.

1. Open **My vCards** and press your card.
2. Press the **Edit** tab and scroll down to **vKad Details**.
3. Type the code from your NFC card into **NFC UID**. Or press **Scan QR** and point your phone or laptop camera at the QR code on the NFC card.
4. It saves on its own. From now on, tapping the NFC card opens your vKad card.



One NFC card can link to one vKad card only. If the code is already used by another card, vKad says "This NFC number already exists" and keeps the old value.

The **Scan QR** camera was not tried for this guide; typing the code was.

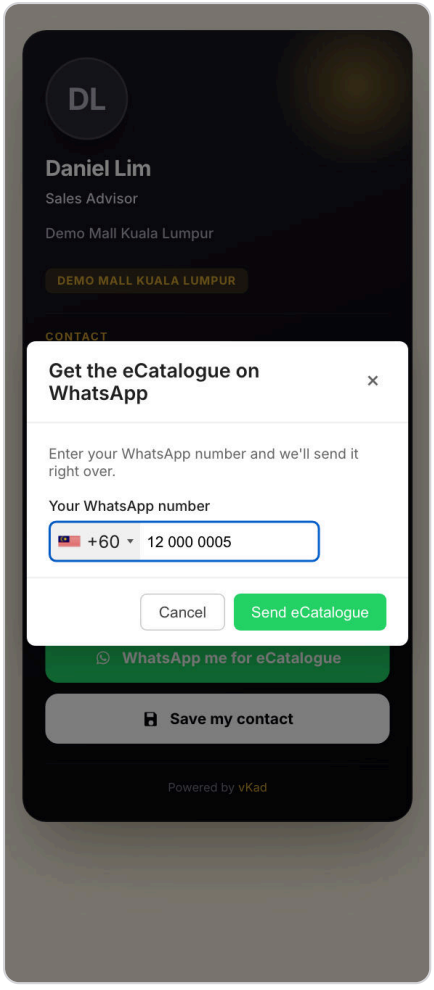
Order a printed NFC card

On the **Manage Card** page, press **Request Print**, then **Request New**. The **Request Physical Card** form asks for the card type, quantity and delivery address, and shows the price. Payment for the order is not covered in this guide.

See who asked for your catalogue

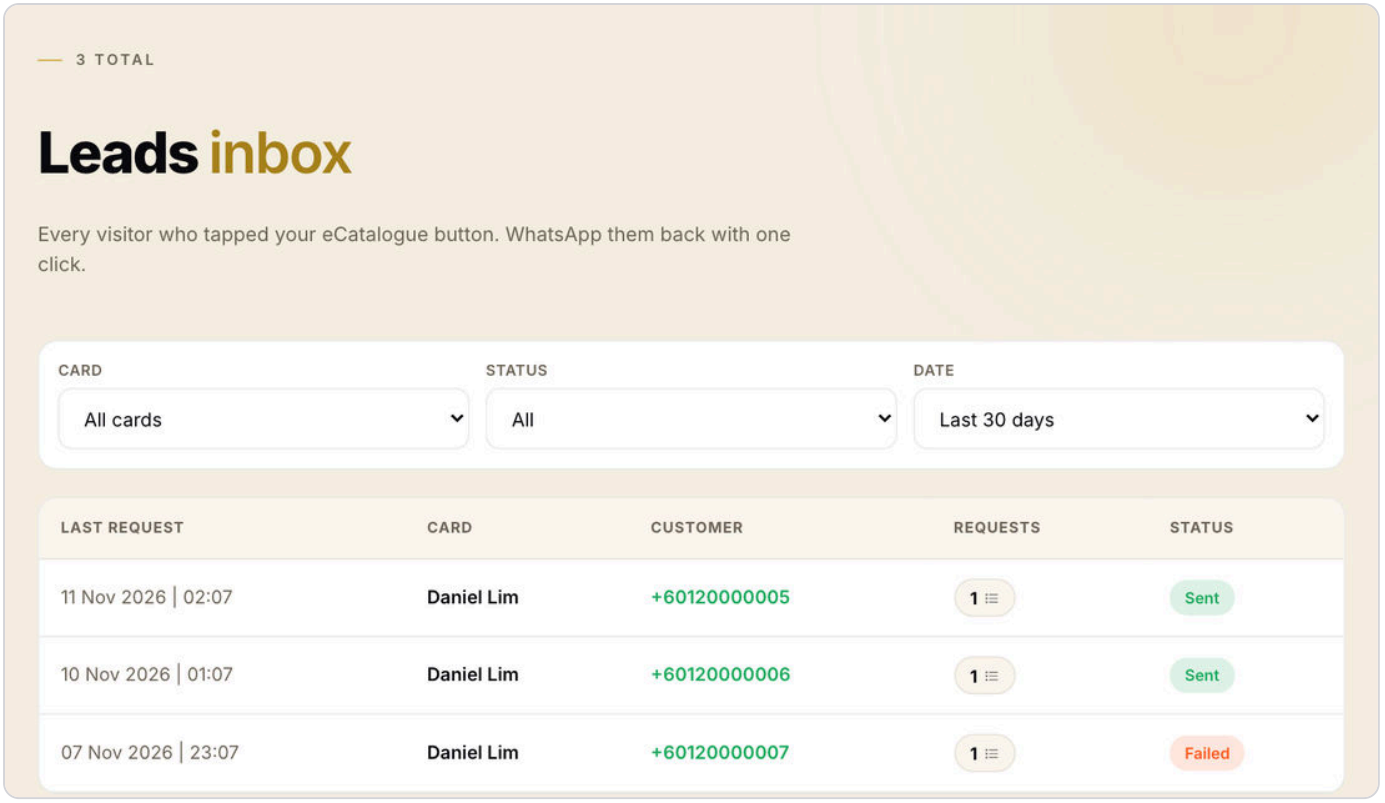
For: Account Owner, Account Admin, Account User

When your card has a catalogue, customers see a **WhatsApp me for eCatalogue** button. They press it, type their WhatsApp number and press **Send eCatalogue**. vKad then sends them the catalogue on WhatsApp and lists the request under **Leads** so you can follow up.



To see the requests:

1. Open **Leads** in the menu on the left.
2. Each row shows when the customer asked, which card they used, their number and how many times they asked.
3. **Status** says whether the WhatsApp message went out: **Sent**, **Partial** (only part of it went out) or **Failed**.
4. Use **Card**, **Status** and **Date** at the top to narrow the list.



An **Account User** sees requests for their own cards. **Account Owner** and **Account Admin** see requests for every card in the account.

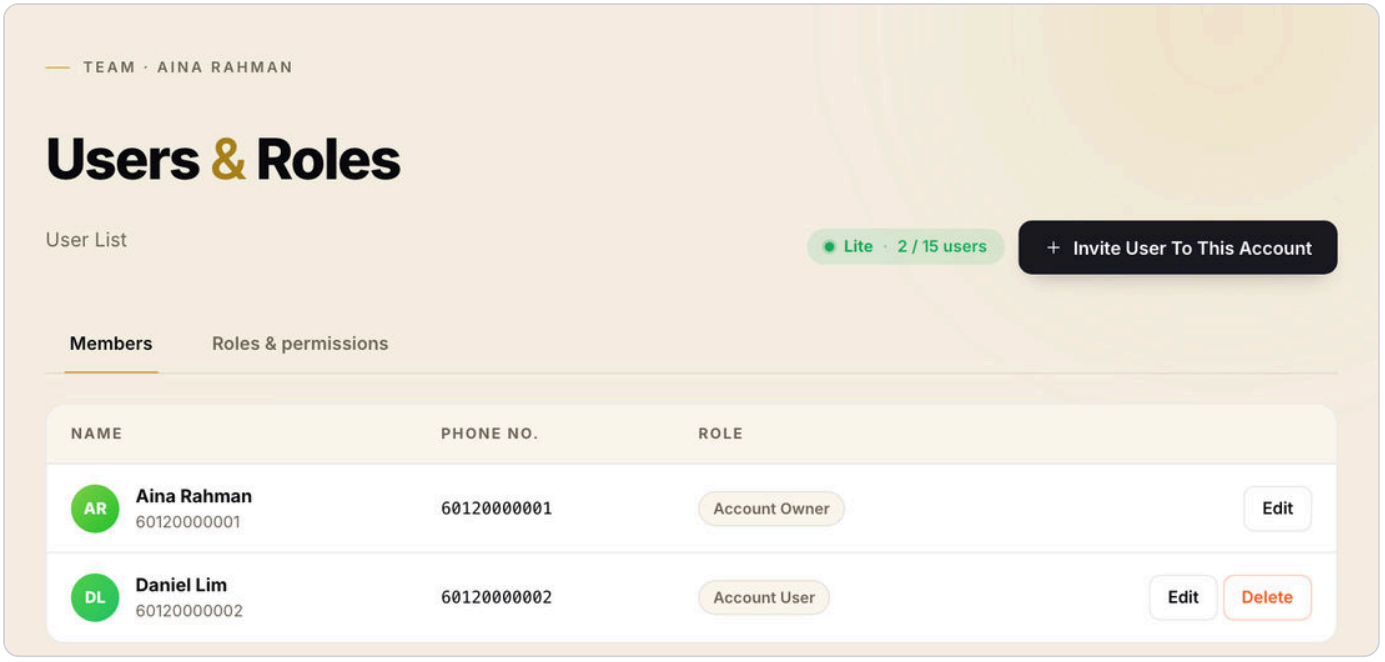
The WhatsApp sending was switched off in the copy used for this guide, so the customer's "sent" message was not seen here. The request was still saved and listed.

Add people to your account

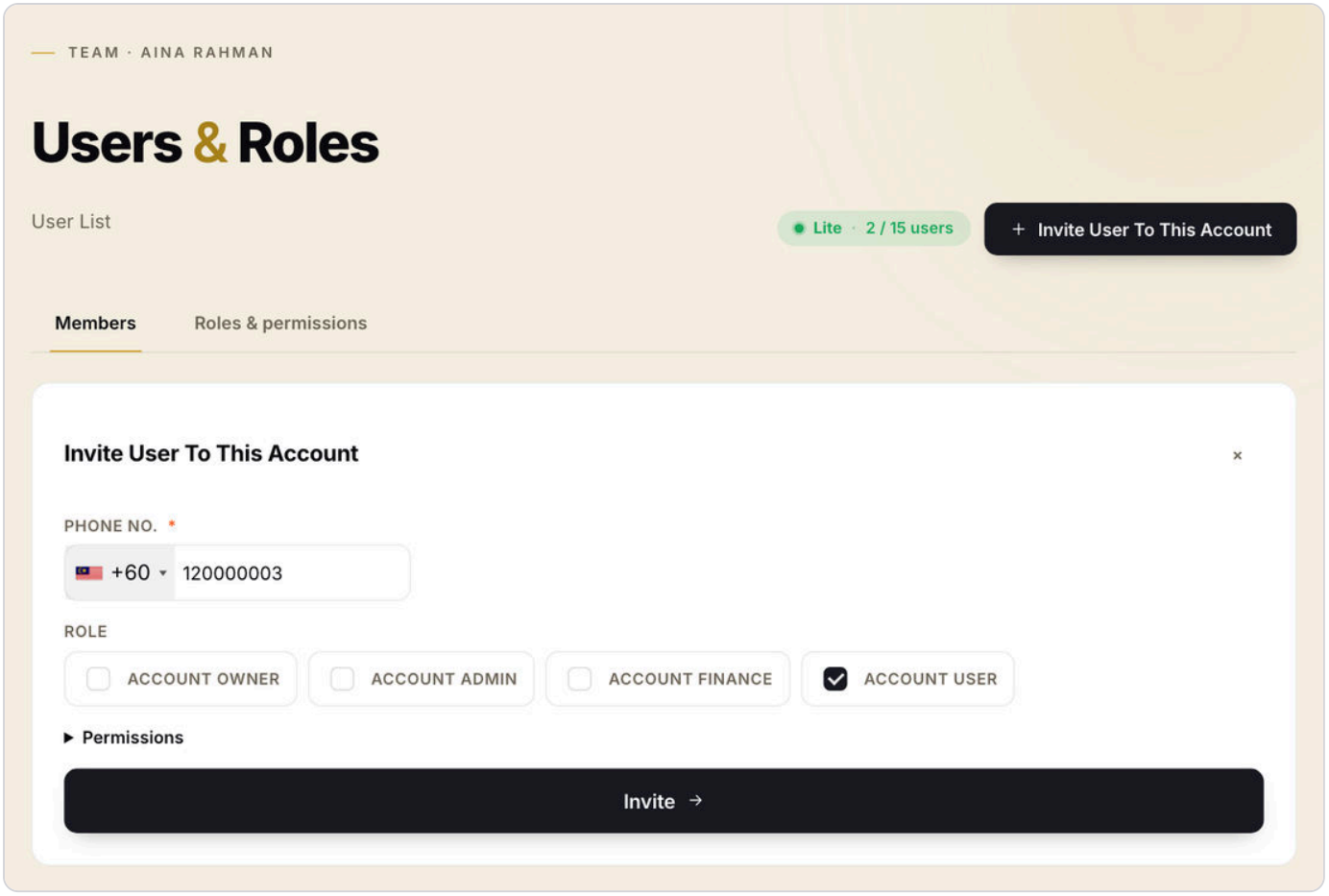
For: Administrators

This page is for **Account Owner** and **Account Admin**.

1. Open **Users & Roles** in the menu on the left. **Members** lists everyone in the account with their role. The green label shows how many people your plan allows.
2. Press **Invite User To This Account**.



3. Type the person's mobile number in **Phone No.**. Check the country code on the left.
4. Tick their role under **Role**. For most staff this is **Account User**.
5. Press **Invite**.



vKad adds the person to your account straight away. It does not send them a text message today, so tell them yourself to sign in to vKad with that phone number.

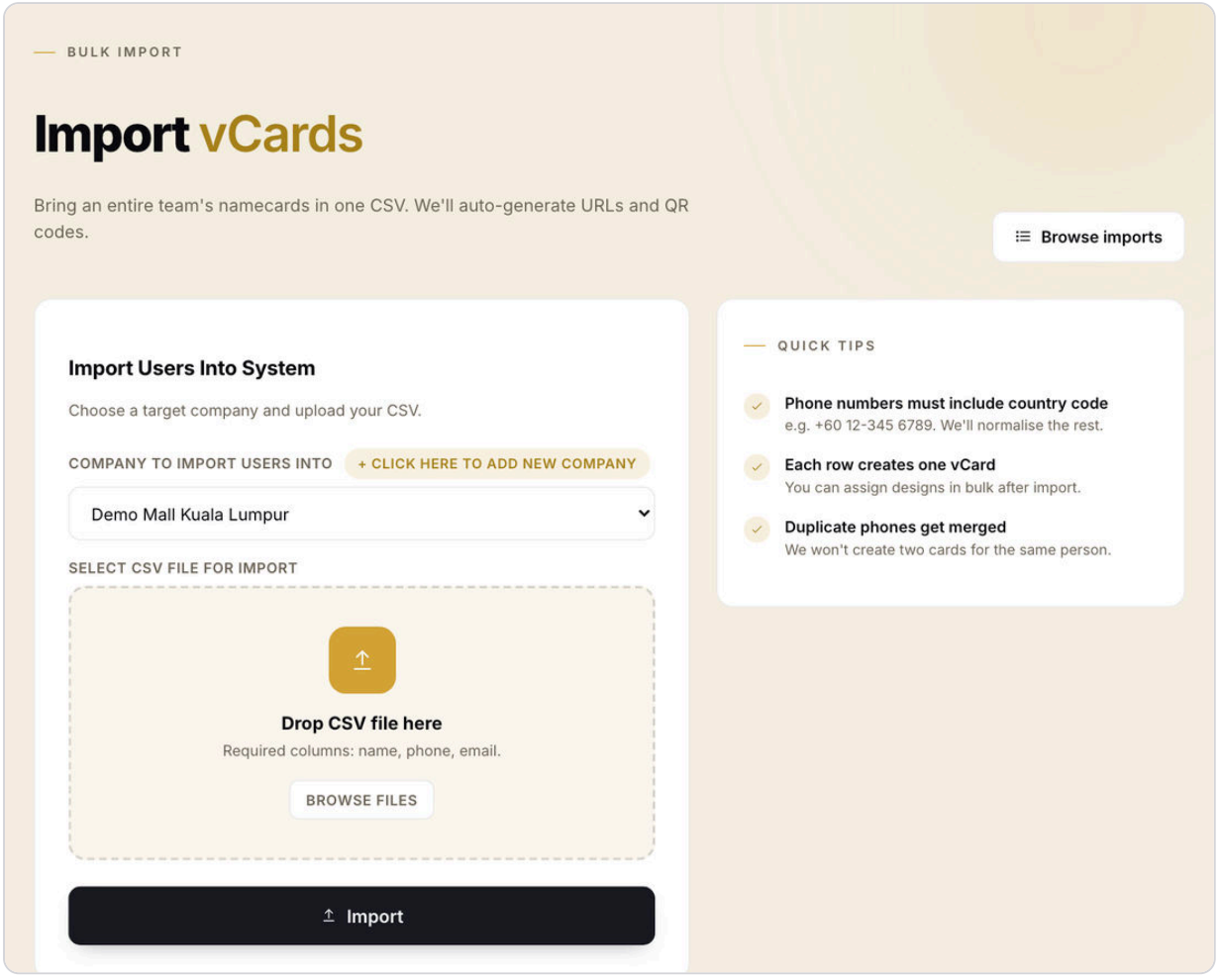
To change someone's role, press **Edit** on their row. To remove them, press **Delete**. **Roles & permissions** shows what each role can do.

Make cards for many staff at once

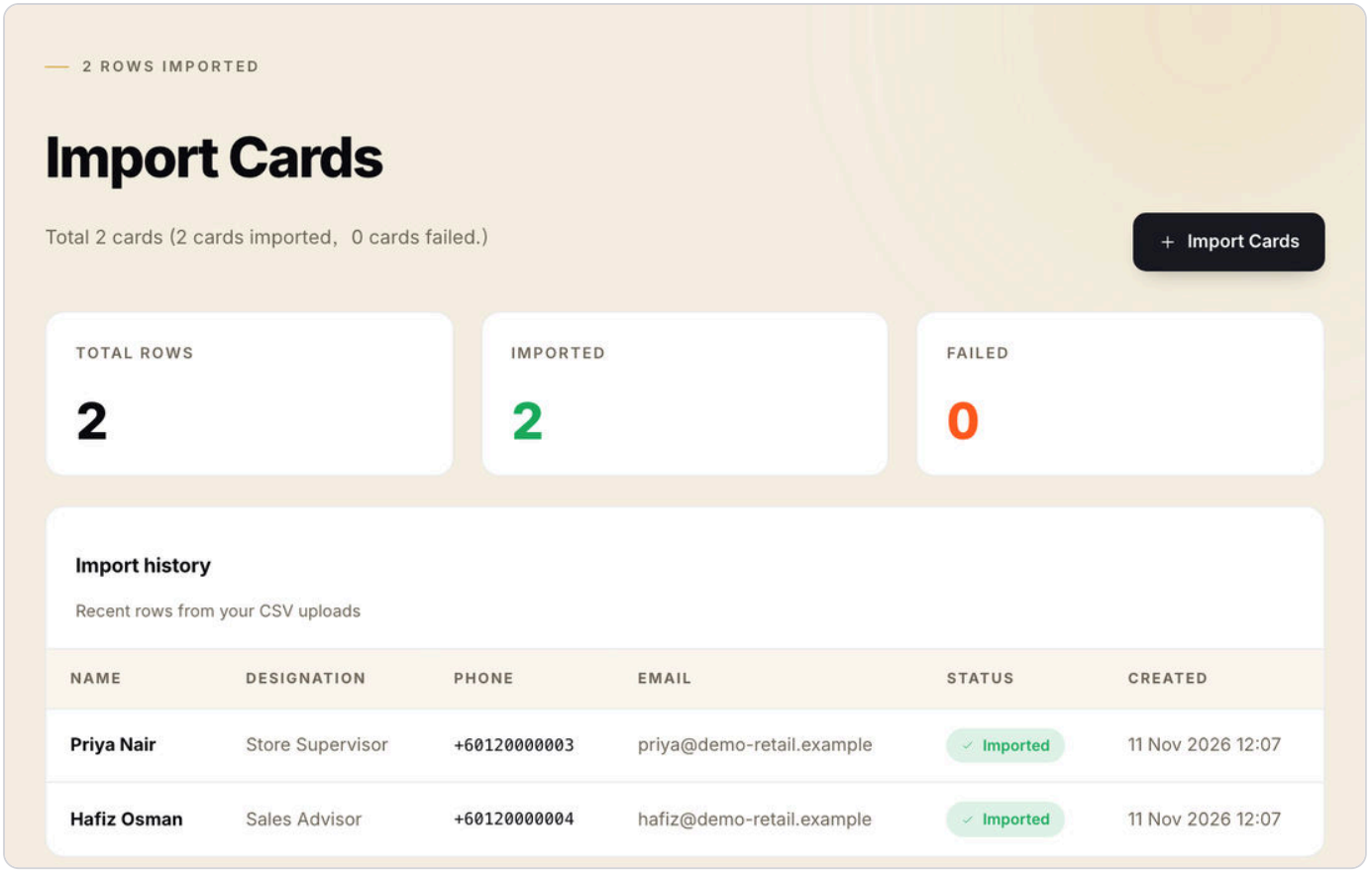
For: Administrators

This page is for **Account Owner** and **Account Admin**. Use it to make cards for a whole team from one spreadsheet.

1. Make a spreadsheet with exactly these four column headings in the first row: **Name**, **Designation**, **Tel**, **Email**. Fill one row per person. Put the phone number with the country code and no plus sign, for example 60120000003. Every row needs a name, a designation and an email.
2. Save it as a CSV file (in Excel: **File**, **Save As**, **CSV**).
3. Open **Import vCards** in the menu on the left.
4. Choose the company under **Company to import users into**.
5. Press **Browse files** and pick your CSV file.
6. Press **Import**.



vKad shows the result: how many rows were imported and how many failed, with one line per person.



Things to know:

- The upload box says "Required columns: name, phone, email". That is not quite right: the file only works with the four headings in step 1, spelled the same way.
- A row whose name, email and phone match a card that already exists is skipped as a duplicate.
- Imported cards use the first design, belong to the **Account Owner**, and are not linked to the company you chose. Open each card's **Edit** tab to pick the company under **Company Name**, and set **Card Owner** to the staff member once they have been added under **Users & Roles**.

USER GUIDE · VERSION 1

Membership and Loyalty

Customers join with their phone number, earn points on every order, move up tiers that earn faster, and spend points as a discount at checkout. Still being built: these pages cover what works today.

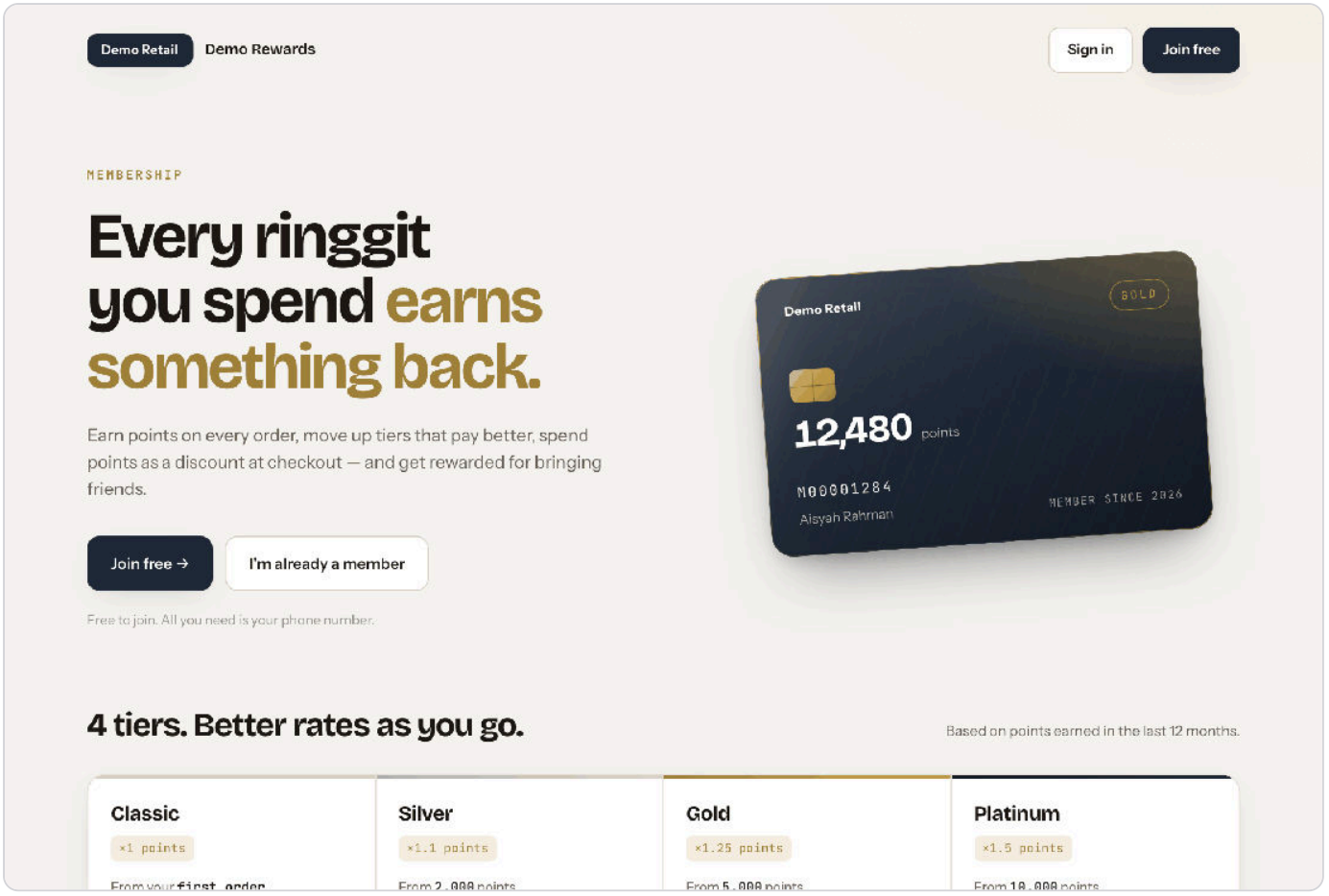
1. What it is for
2. Join and sign in
3. See your points and card
4. Approve spending points at the till
5. See how the programme is doing
6. Find a member
7. Correct points, suspend or move a tier
8. Change the tiers
9. Set the name, colours and front page

MEMBERSHIP AND LOYALTY

What it is for

For: Everyone

Membership and Loyalty is your company's points programme. A customer joins with their phone number and gets a member number. Every paid order earns points. The more points a member earns in the last 12 months, the higher their tier, and a higher tier earns points faster. Members spend points as money off at checkout, and get bonus points for bringing friends.



Who uses it

- **Member**: a customer. They see their own card, points and history under **My membership**.
- **Staff**: your team. They also see **Overview**, **Members** and **Tiers**, can correct a member's points, and can suspend a membership.
- **Admin**: everything Staff can do, plus changing the tiers and the **Branding** page.

How the points work

	How it works
Earning	1 point for every RM1 paid, times the member's tier (for example ×1.25 for Gold).
Tiers	Classic from the first order, Silver from 2,000 points, Gold from 5,000, Platinum from 10,000. Only points earned from orders and referrals in the last 12 months count.
Spending	100 points = RM1 off, in whole steps of 100 points.
Referrals	When a friend joins with a member's code and pays for their first order, the friend gets 200 points and the member gets 500.

These are the starting numbers. Tier names and thresholds can be changed on the **Tiers** page; the rest is set by your technical team.

What it needs from other modules

Members do not earn or spend points in this module. Points are earned and spent where the customer pays: the shop till (Retail POS), the online shop (E-commerce) and the mobile app (SuperApp). Those modules tell Membership about each order. When a member spends points at a till, the approval on their phone goes through the App API server.

Not ready yet

- Points have a 12-month expiry date, but nothing removes expired points yet. No points expire today.
- There is no screen to make a person Staff or Admin. Ask your technical team.
- Joining on this website has no place to type a friend's referral code. A referral code works only when the friend joins through the till, the online shop or the app.
- The earn rate, the referral bonuses and the 100-points-per-RM1 rate can only be changed by your technical team.

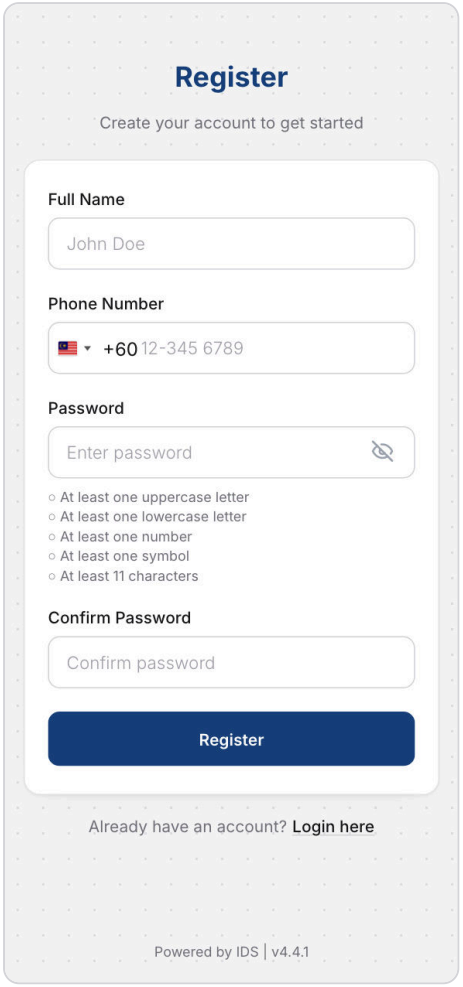
MEMBERSHIP AND LOYALTY

Join and sign in

For: Members

Join

1. Open the programme's front page and press **Join free**.
2. Type your **Full Name**, your **Phone Number**, and a **Password** twice. The password needs an uppercase letter, a lowercase letter, a number, a symbol and at least 11 characters.
3. Press **Register**.

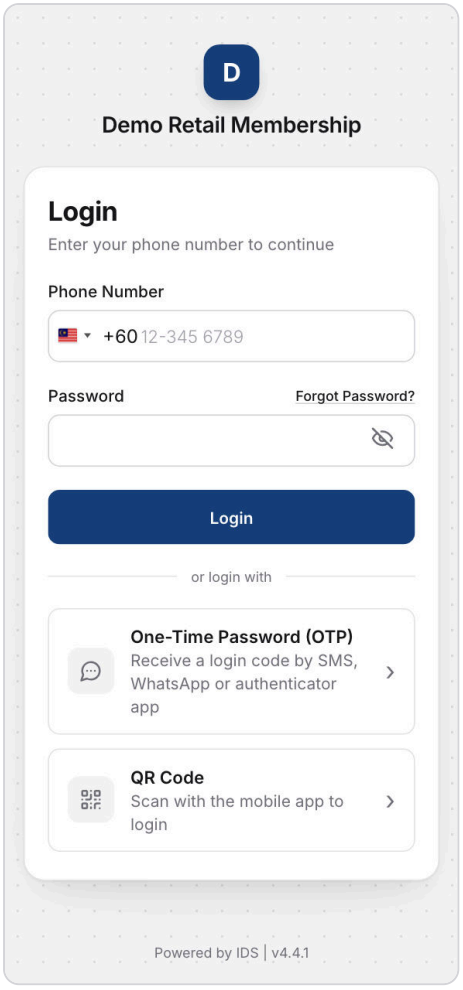


Your phone number is your membership. Your card and member number appear the first time you open **My membership**.

Sign in

1. Press **Sign in** (or **I'm already a member**) on the front page.
2. Type your **Phone Number** and **Password**, then press **Login**.

You can also sign in with a one-time code sent to your phone (**One-Time Password (OTP)**), or by scanning a **QR Code** with the mobile app.



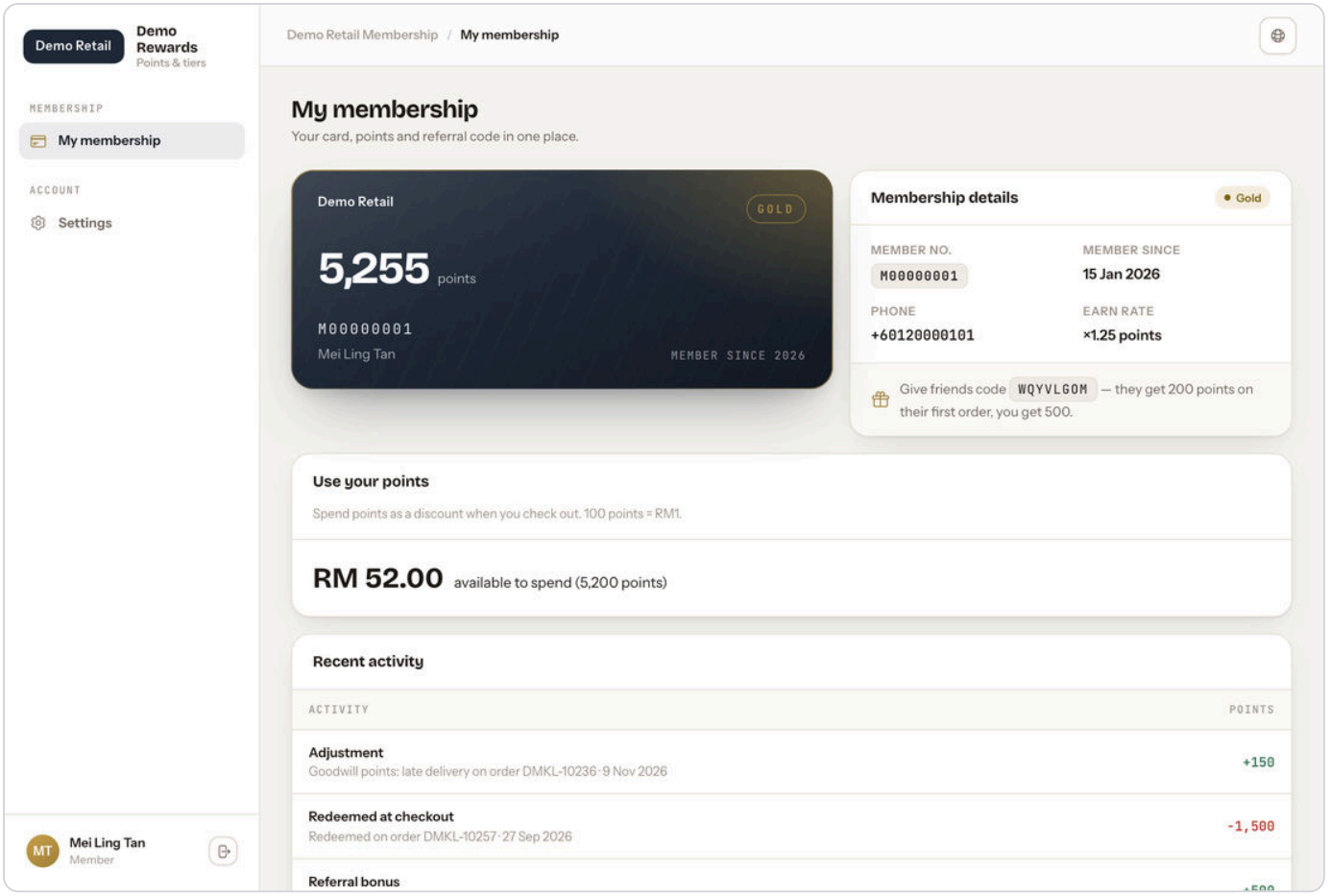
If you forget your password, press **Forgot Password?** on the same page.

Staff sign in the same way, or open the module from the Portal home page.

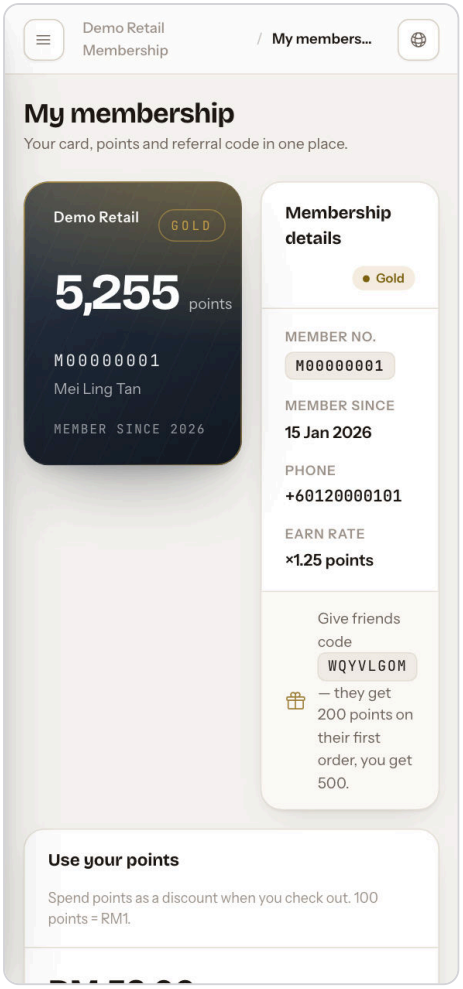
See your points and card

For: Members

After you sign in you land on **My membership**.



- **The card** shows your points, your member number, your name and your tier (for example **GOLD**).
- **Membership details** shows your **Member no.**, **Member since**, **Phone** and **Earn rate**. An earn rate of ×1.25 means RM100 paid gives you 125 points.
- **Give friends code** is your referral code. When a friend joins with it and pays for their first order, they get 200 points and you get 500.
- **Use your points** shows how much money off your points are worth right now. Points are spent in steps of 100 (100 points = RM1), so a balance of 5,255 points gives RM 52.00 off.
- **Recent activity** lists your last 10 point changes: points earned on an order, points spent, referral bonuses and corrections made by staff.



If something looks wrong

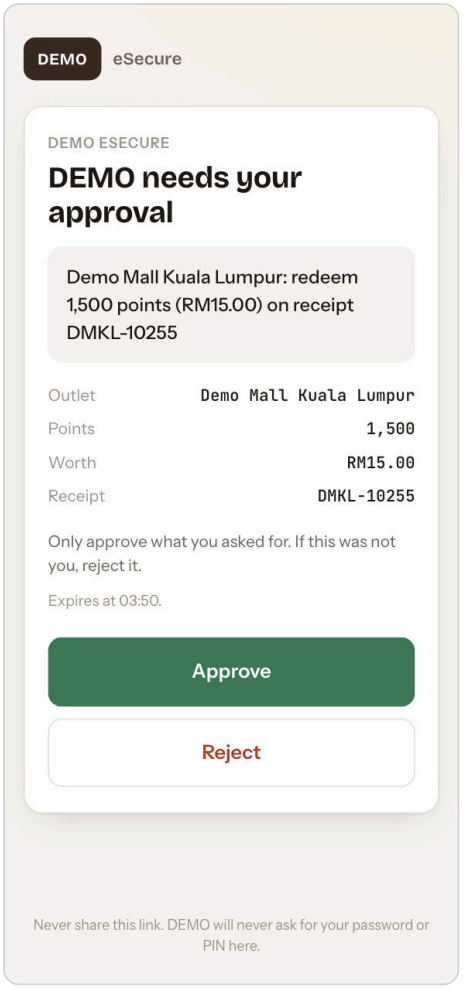
- **"We need your phone number to open your membership"**: your account has no phone number. Ask staff to add it.
- **"Your membership is suspended"**: you cannot earn or spend points until staff reactivate it. Contact your company.
- Points missing for an order: ask staff to check the order. They can add the points by hand.

Approve spending points at the till

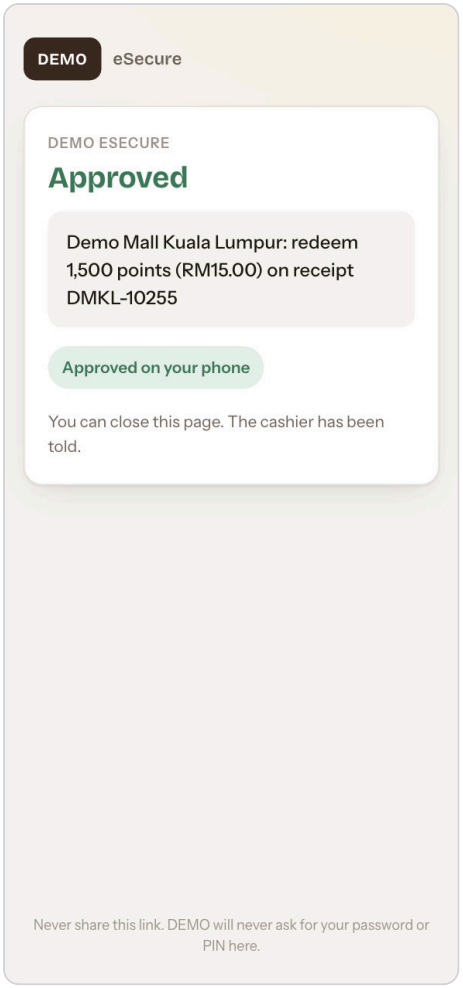
For: Members

When you pay with points at a shop till, the cashier must know it is really you. The till sends an approval request to your phone, called eSecure: a notice in the mobile app, and a WhatsApp message with a button for people without the app.

1. Tell the cashier you want to pay with points. They send the request from the till.
2. Open the WhatsApp message and press its button. A page opens showing the outlet, how many points, what they are worth and the receipt number.
3. Check the details. If they match what you asked for, press **Approve**. If not, press **Reject**.



The page then says **Approved** and the cashier's till is told straight away.

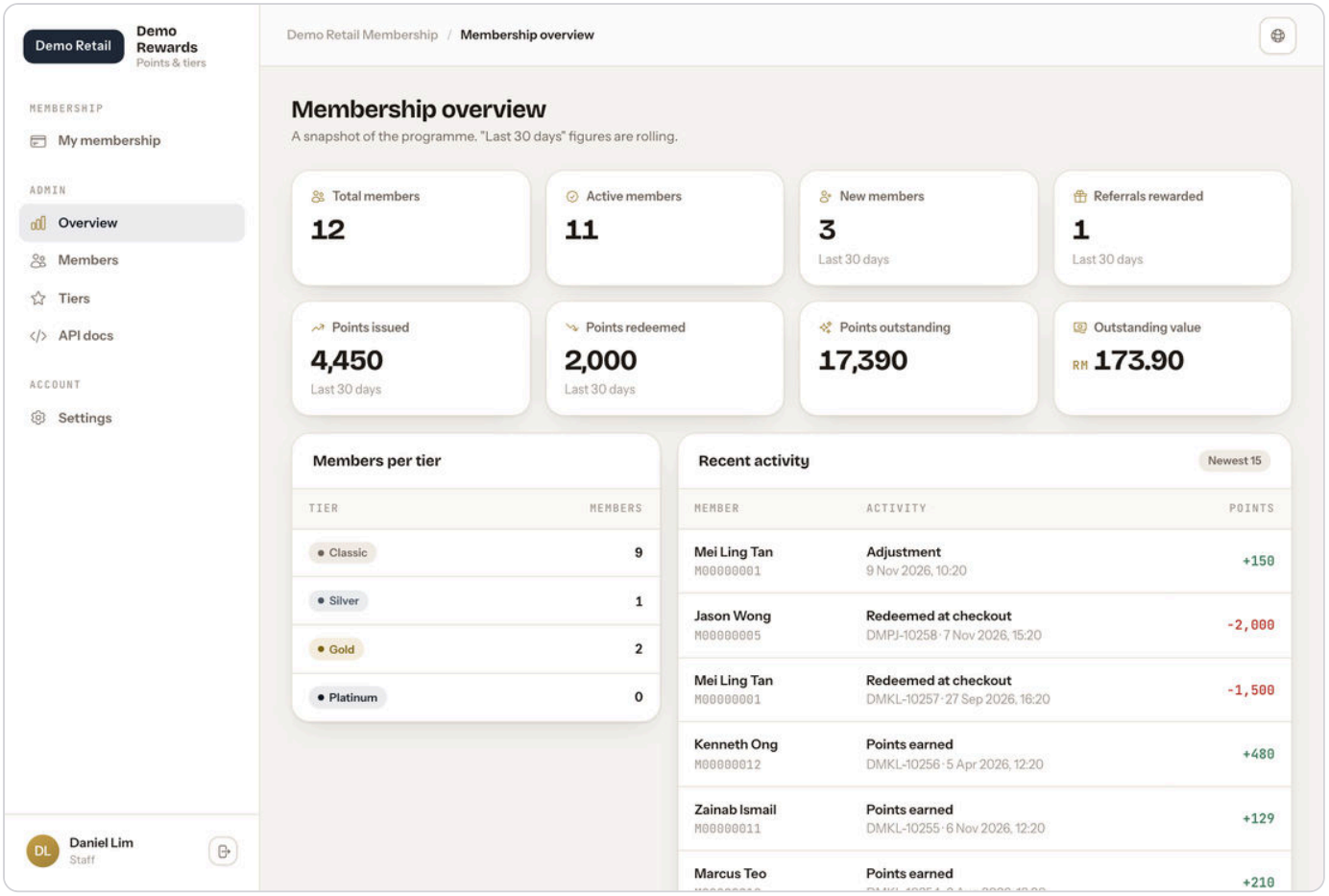


- The request lasts about 2 minutes. If it runs out, ask the cashier to send a new one.
- Never share the link. Your company will never ask for your password or PIN on this page.
- Instead of eSecure, the cashier can send you a one-time code by WhatsApp or SMS for you to read out.

See how the programme is doing

For: Staff

Open **Overview** in the menu on the left.



The tiles at the top:

Tile	What it counts
Total members	Everyone who has joined.
Active members	Members who are not suspended.
New members	Joined in the last 30 days.
Referrals rewarded	Friends who joined with a code and paid for their first order, in the last 30 days.
Points issued	Points earned from orders and referrals in the last 30 days.
Points redeemed	Points spent at checkout in the last 30 days (after any returned).

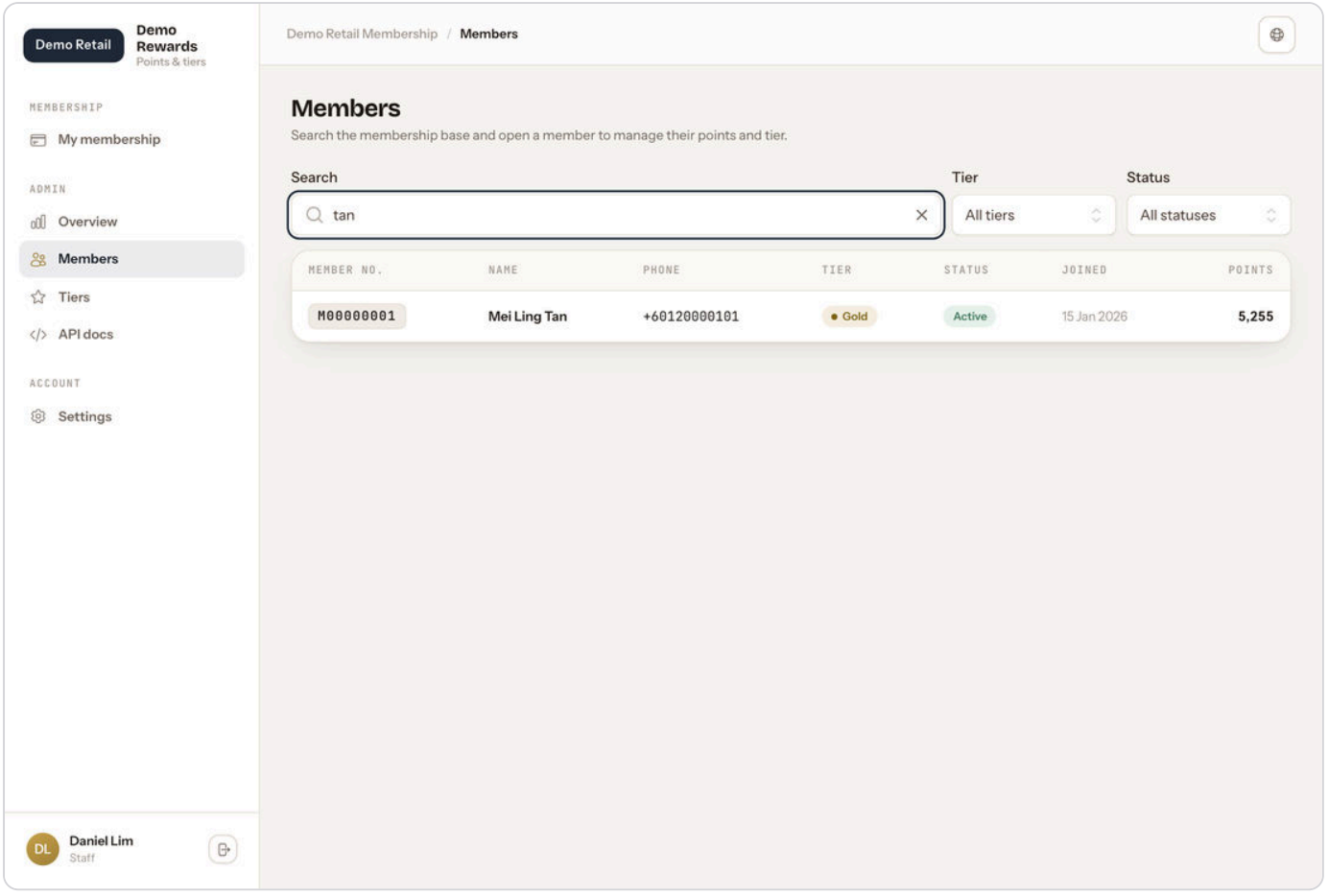
Tile	What it counts
Points outstanding	Points members hold and have not spent yet.
Outstanding value	What those points are worth as money off (100 points = RM1). This is what the programme owes members.

Members per tier shows how many members sit in each tier. **Recent activity** shows the 15 newest point changes across all members. Press a member's name to open their page.

Find a member

For: Staff

1. Open **Members** in the menu on the left.
2. Type in **Search**: part of a name, phone number, member number or email. The list updates as you type.
3. To narrow the list, pick a **Tier** or a **Status** (**Active** or **Suspended**).
4. Press the member number on the left of a row to open that member.



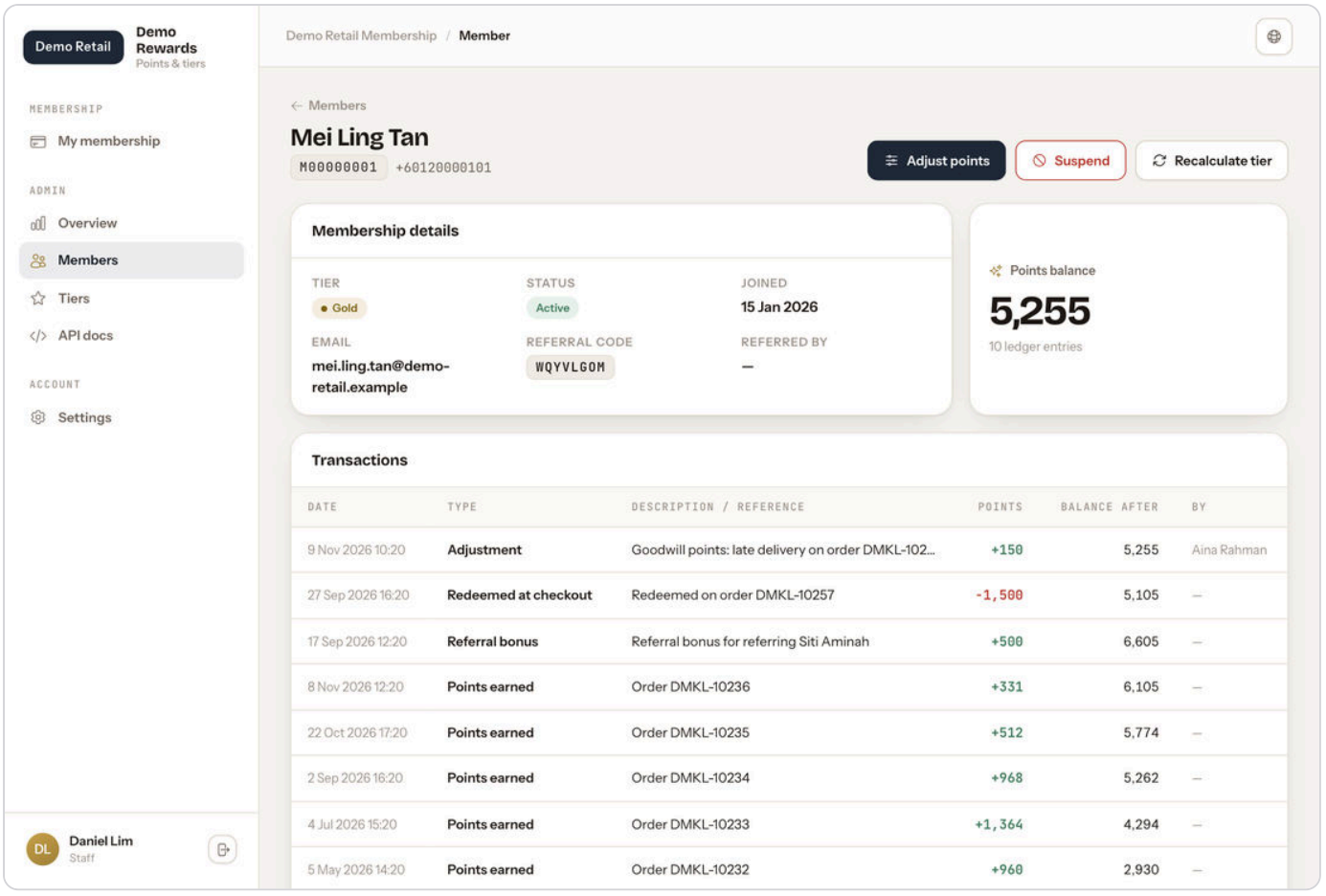
The list shows the newest members first, 25 to a page. **Points** is the member's balance right now.

If nothing matches, the page says **No members match**. Try fewer letters, or set **Tier** and **Status** back to **All tiers** and **All statuses**.

Correct points, suspend or move a tier

For: Staff

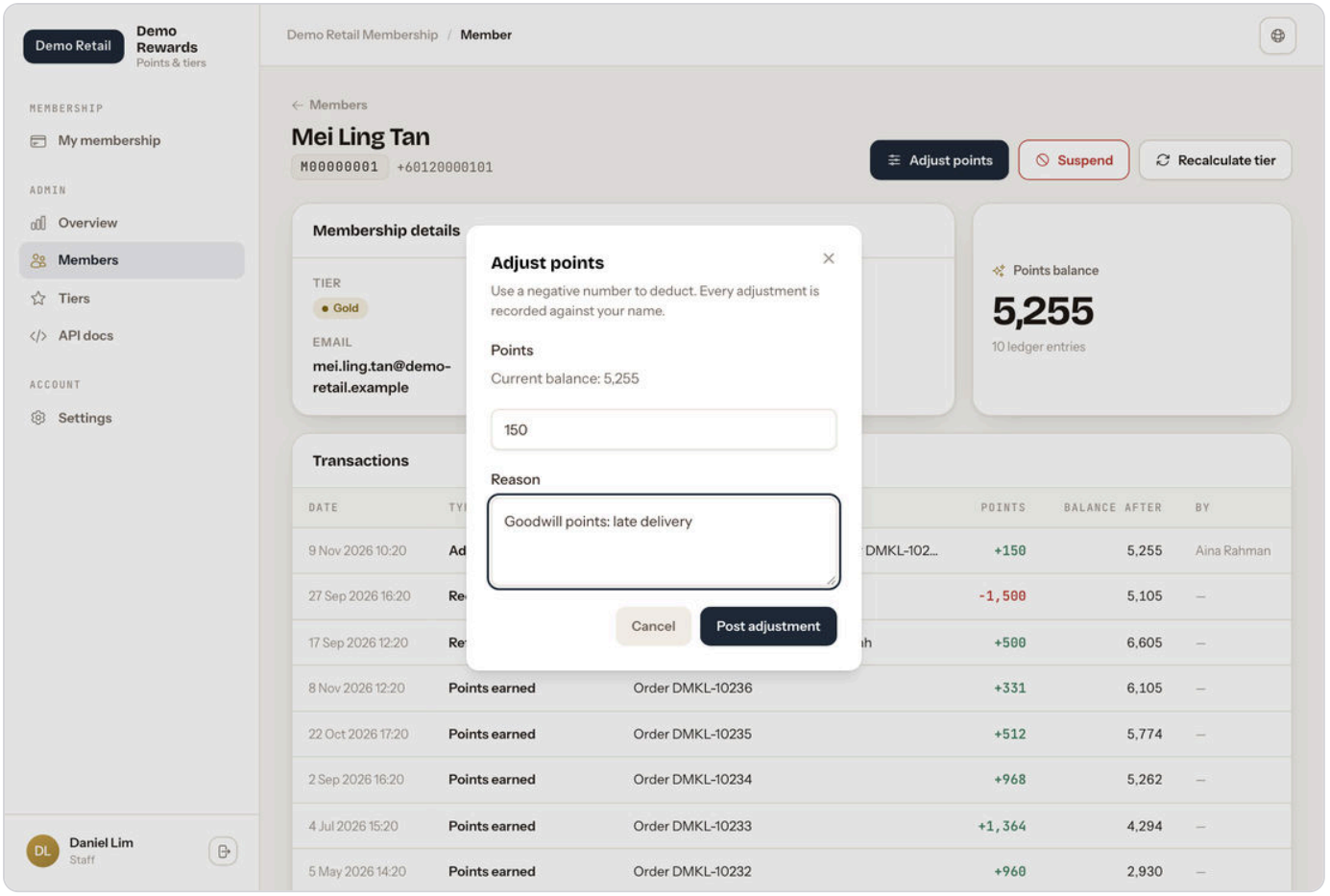
Open a member from **Members**. Their page shows **Membership details**, the **Points balance**, every point change under **Transactions** (with who made it under **By**), and the friends who joined with their code under **Referrals made**.



Add or remove points by hand

Use this for goodwill points or to fix a mistake.

1. Press **Adjust points** at the top right.
2. In **Points**, type the number to add. To take points away, put a minus in front (for example -100).
3. In **Reason**, say why. The reason is required, and the change is saved under your name.
4. Press **Post adjustment**.



You cannot take away more points than the member has. Points added by hand do not count towards the member's tier.

Suspend or reactivate a membership

Press **Suspend** and confirm. A suspended member cannot earn or spend points, and their page shows a red notice. To undo it, press **Reactivate**.

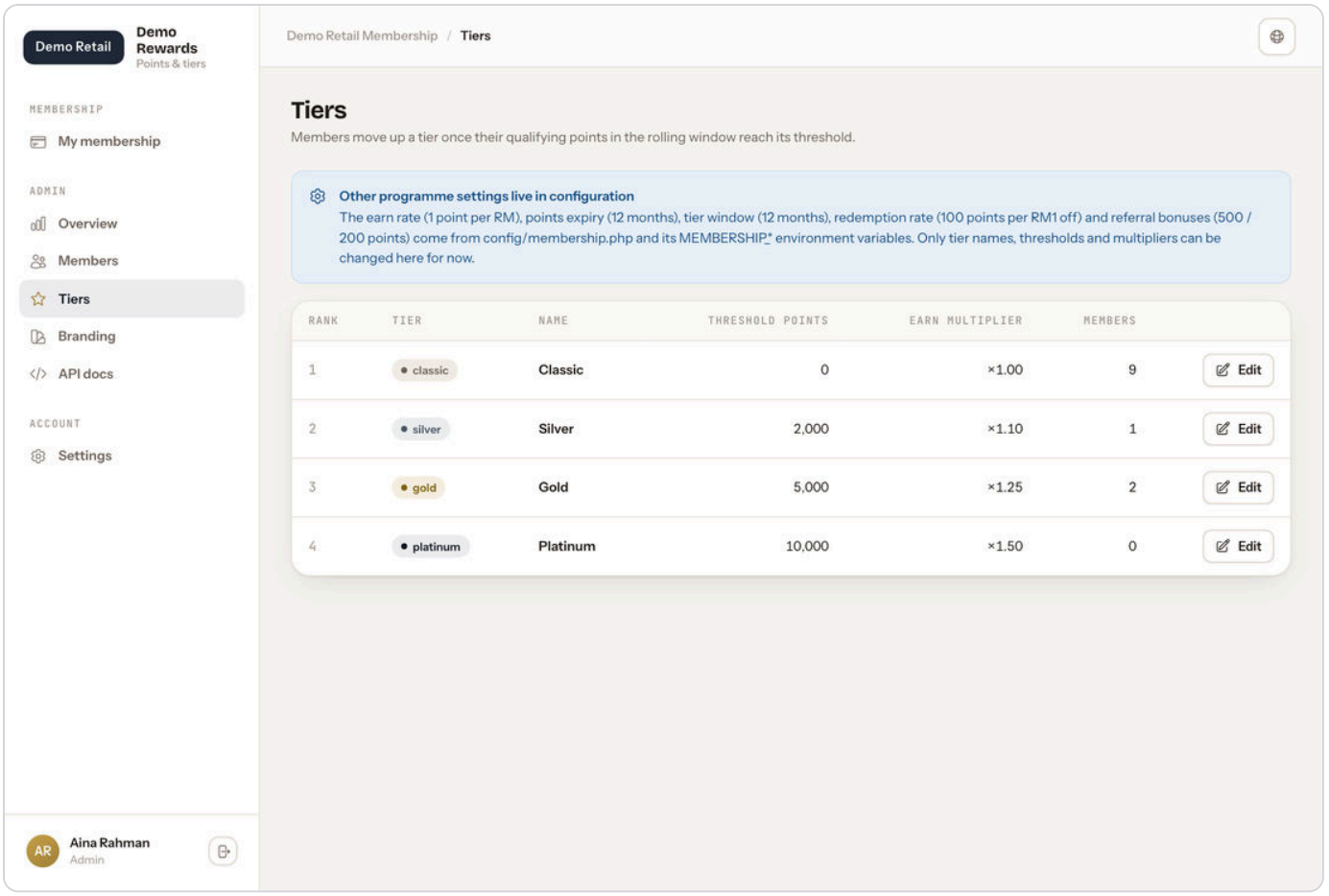
Recalculate tier

A member's tier is checked again after every paid order. Press **Recalculate tier** to check it now, for example after the tier thresholds were changed. The member can move up or down, depending on the points they earned from orders and referrals in the last 12 months.

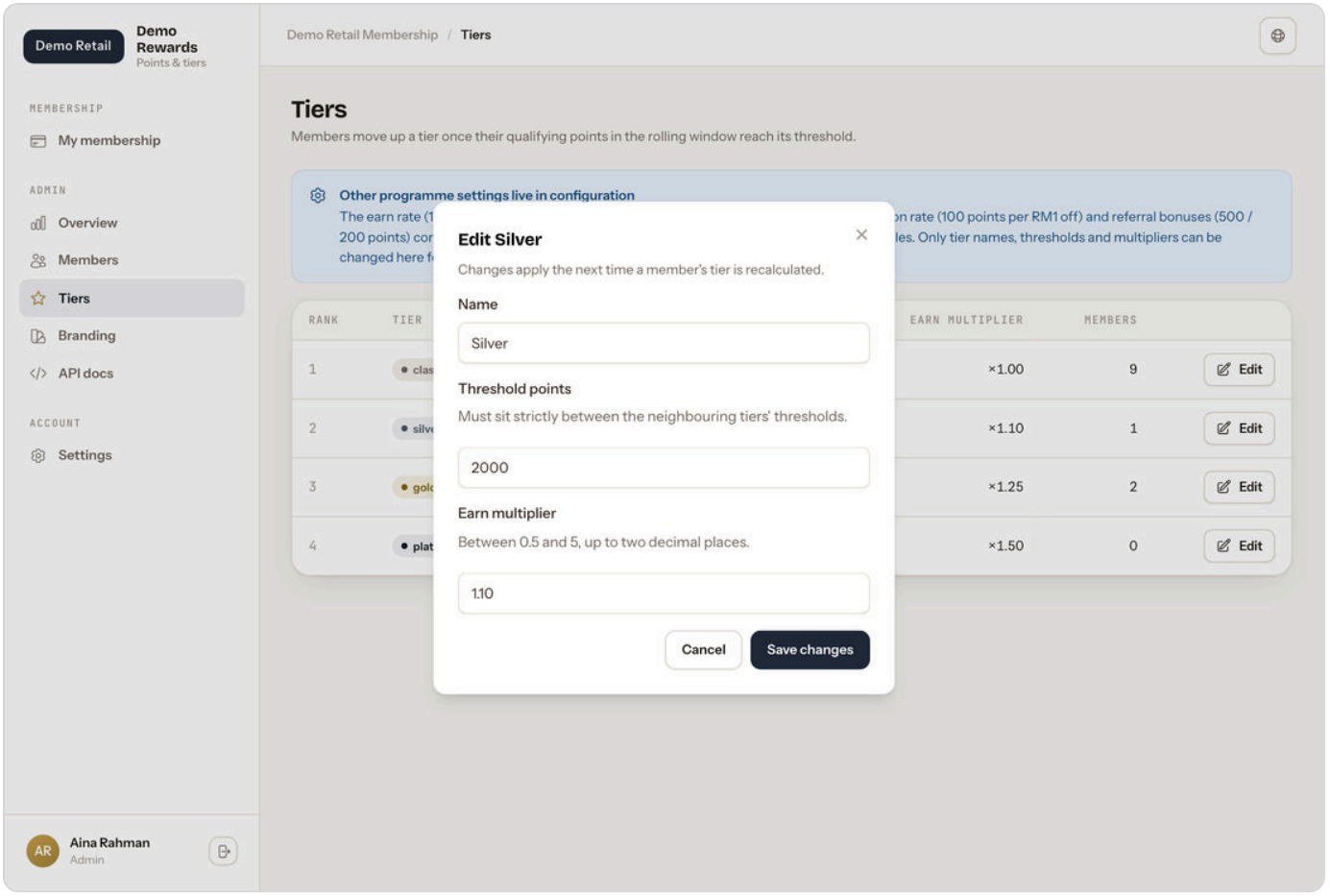
Change the tiers

For: Administrators

Open **Tiers** in the menu on the left. Staff can see this page. Only an Admin sees the **Edit** buttons.



1. Press **Edit** on the tier you want to change.
2. Change the **Name**, the **Threshold points** (the points needed to reach this tier) or the **Earn multiplier** (between 0.5 and 5; 1.25 means 25% more points).
3. Press **Save changes**.



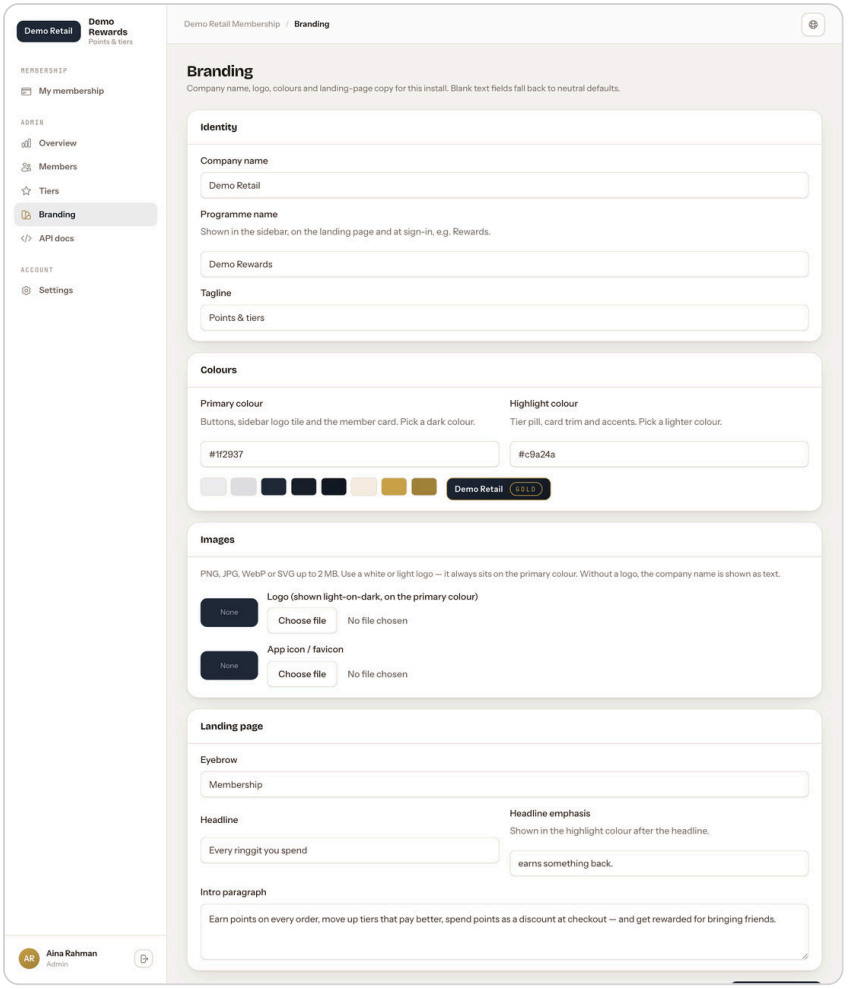
- Each tier's threshold must be higher than the tier below it and lower than the tier above it.
- The first tier always starts at 0 points.
- You cannot add or remove a tier here.
- Members do not move straight away. Each member is moved on their next paid order, or when staff press **Recalculate tier** on their page.

The blue notice at the top lists the settings this page cannot change: the earn rate, how long points last, the 12-month tier window, the 100-points-per-RM1 rate and the referral bonuses. Ask your technical team to change those.

Set the name, colours and front page

For: Administrators

Open **Branding** in the menu on the left. Only an Admin sees it.



- **Identity**: the **Company name** (shown on the member card), the **Programme name** (shown in the menu, on the front page and at sign-in) and a short **Tagline**.
- **Colours**: the **Primary colour** for buttons and the member card (pick a dark colour), and the **Highlight colour** for the tier label and trims (pick a lighter one). Type the colour code (for example #1f2937). The row of samples below shows the shades made from your two colours, and a small preview of the member card.
- **Images**: a **Logo** and an **App icon / favicon** (the small picture in the browser tab). PNG, JPG, WebP or SVG, up to 2 MB. Use a white or light logo, because it always sits on the primary colour. Without a logo, the company name is shown as text.
- **Landing page**: the words on the public front page. The **Headline emphasis** is shown in the highlight colour after the **Headline**.

Press **Save branding** at the bottom. A text box left empty goes back to the plain starting wording.

USER GUIDE · VERSION 1

SuperApp (mobile)

The customer app on the phone: one sign-in for the membership card and points, the wallet and its top-ups, vouchers, deals, the online shop's catalogue and videos. Still being built: these pages cover what works today and say plainly what does not.

1. What it is for
2. Join and sign in
3. Find your way around
4. Your membership and points
5. Top up your wallet
6. Lock your wallet
7. Use your vouchers
8. The Scan button
9. Deals and the shop
10. Watch streams
11. Your account
12. Withdraw to a bank
13. What does not work yet

What it is for

For: Everyone

The SuperApp is your company's app for customers. A customer signs up once with their mobile number and then has, in one place, their member card and points, a wallet they can top up, the vouchers they hold, the current deals, the products in the online shop and your company's videos. Staff who are also signed in see an extra **Staff page** for their incentives.

Who uses it

- **Customers**: anyone who downloads the app and creates an account. The rest of this guide is written for them.
- **Staff**: the same app, plus a **Staff page** on the **Account** tab. That page belongs to the Staff incentive module and is explained in that guide.

What it needs from other modules

The app shows what other modules hold. It does not keep the figures itself.

- Sign-in, the **Help** links and the app's own settings come from the App API server.
- Points, tier and member number come from Membership and Loyalty.
- The wallet balance, top-ups and vouchers come from the Closed-loop e-wallet. Top-ups are paid through your company's payment provider.
- Deals and products come from E-commerce.
- Verification codes are sent by WhatsApp or SMS through your company's messaging service.

What a customer can do today

Job	**Page**
Create an account, sign in, reset a password	Join and sign in
See points and tier on **Home**	Find your way around
Join the membership, show the member QR, copy the referral code	Your membership and points
Add money to the wallet	Top up your wallet

Job	Page
Pause the wallet	Lock your wallet
Use or browse vouchers	Use your vouchers
Approve a sign-in on a computer	The Scan button
Read deals and browse products	Deals and the shop
Watch videos	Watch streams
Change name, password, PIN, photo; delete the account	Your account

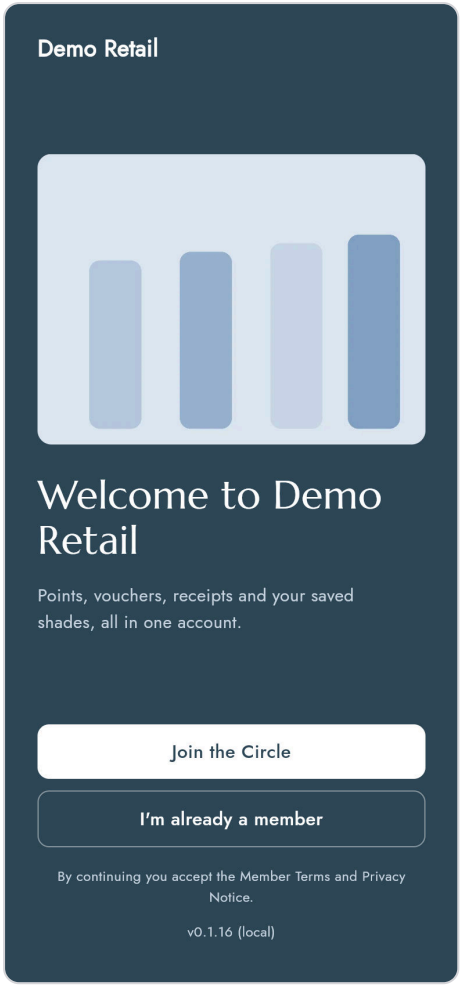
The last page, **What does not work yet**, lists everything a customer may see in the app that is not working for real yet. Read it before you tell customers about the app.

Join and sign in

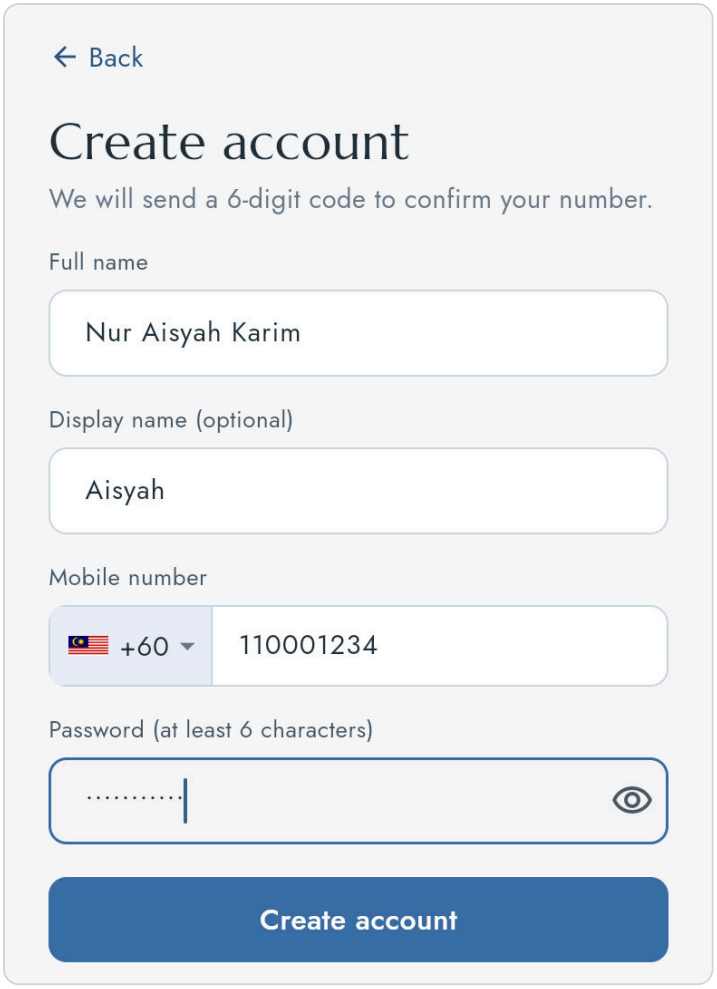
For: Customers

Create an account

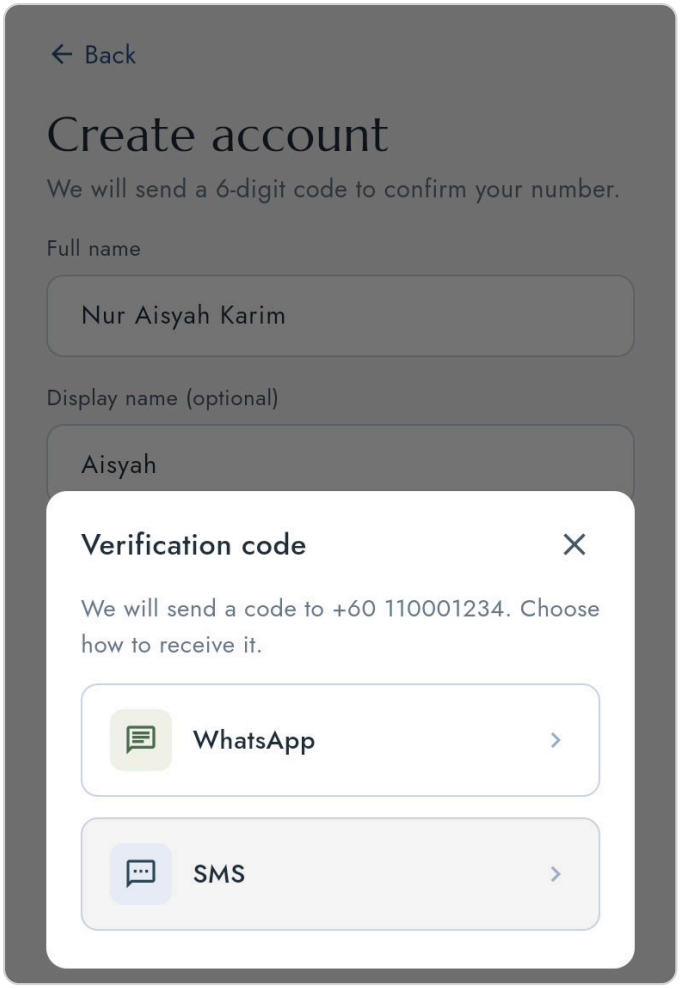
1. Open the app. The first screen has two buttons.



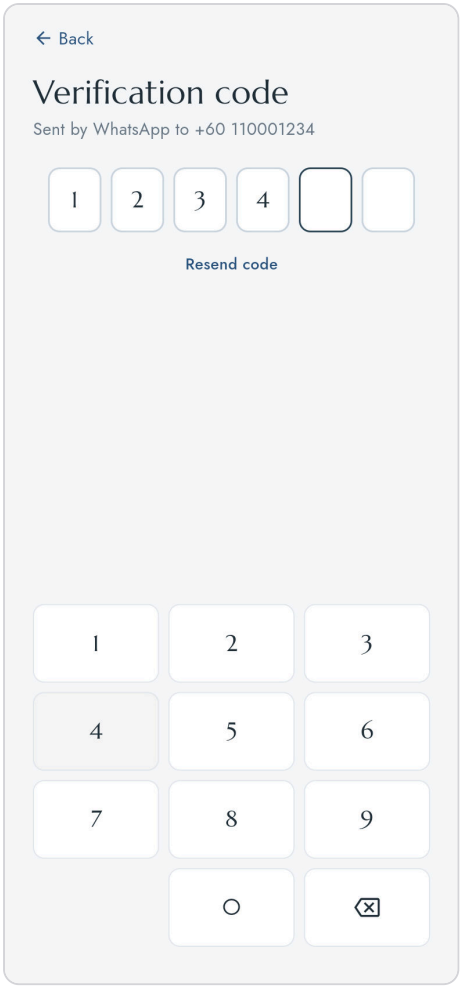
2. Press **Join the Circle**.
3. Fill in **Full name**, **Display name (optional)**, **Mobile number** and **Password (at least 6 characters)**. The display name is the name the app greets you with. Leave the country as **+60** for a Malaysian number and type the number without the first 0.
4. Press **Create account**.



5. Choose how to receive your code: **WhatsApp** or **SMS**.



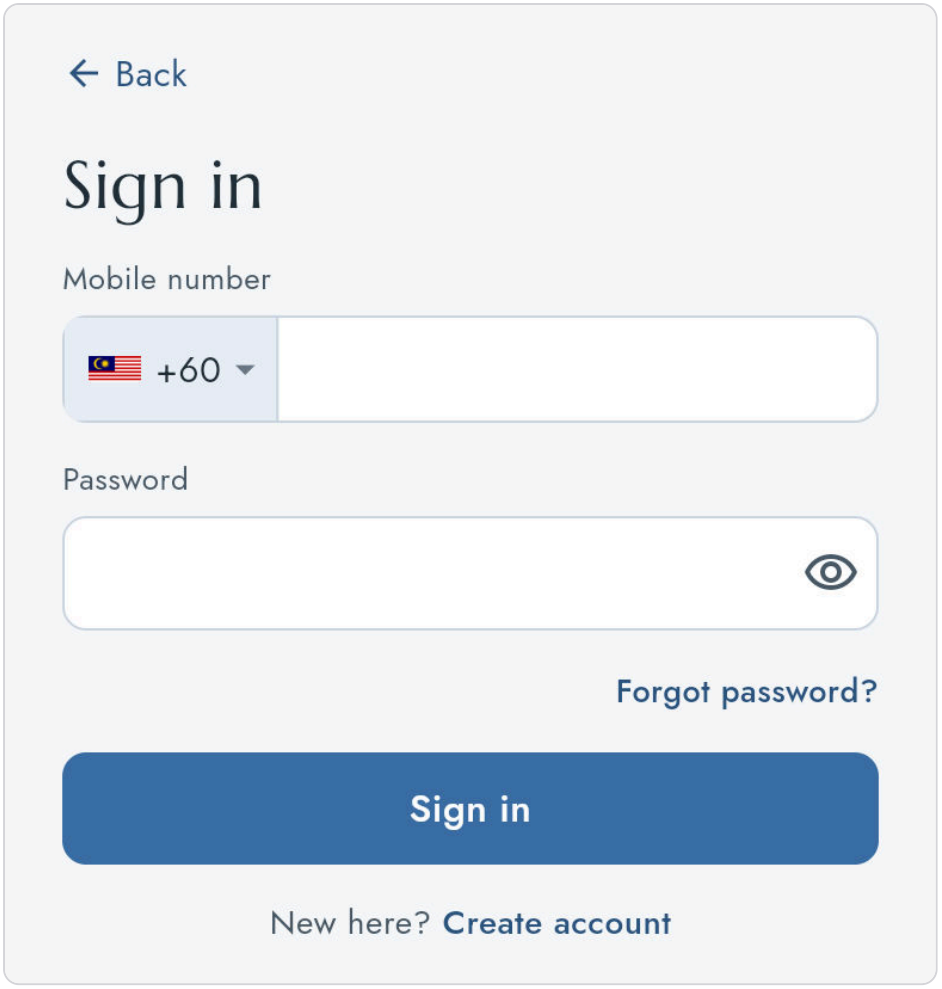
6. Type the 6-digit code on the number pad. The app checks it when the sixth digit is in. If no code arrives, press **Resend code**.



You are now signed in and land on **Home**.

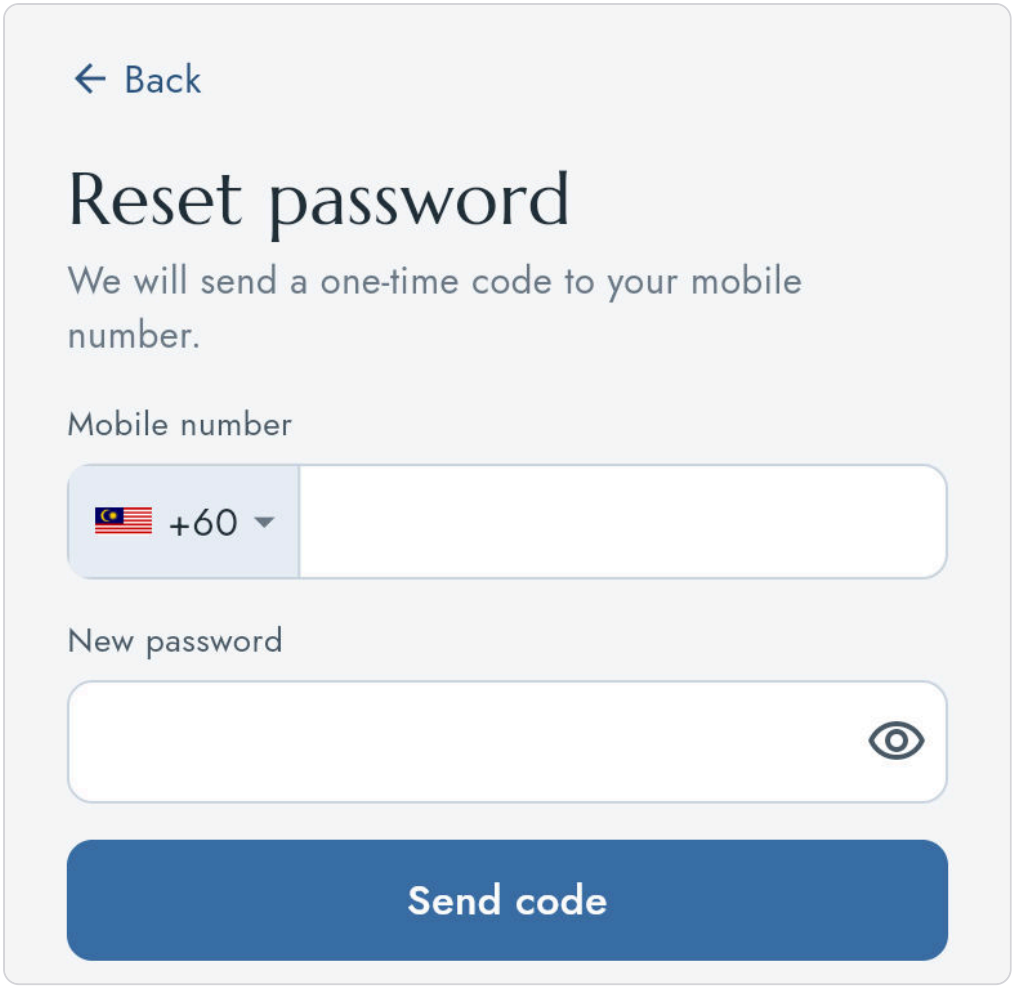
Sign in on a new phone

1. On the welcome screen press **I'm already a member**.
2. Type your **Mobile number** and **Password**, then press **Sign in**.



Forgot your password

1. On the **Sign in** screen press **Forgot password?**.
2. Type your **Mobile number** and the **New password** you want, then press **Send code**.
3. Choose WhatsApp or SMS and type the code you receive. Your new password works from then on.



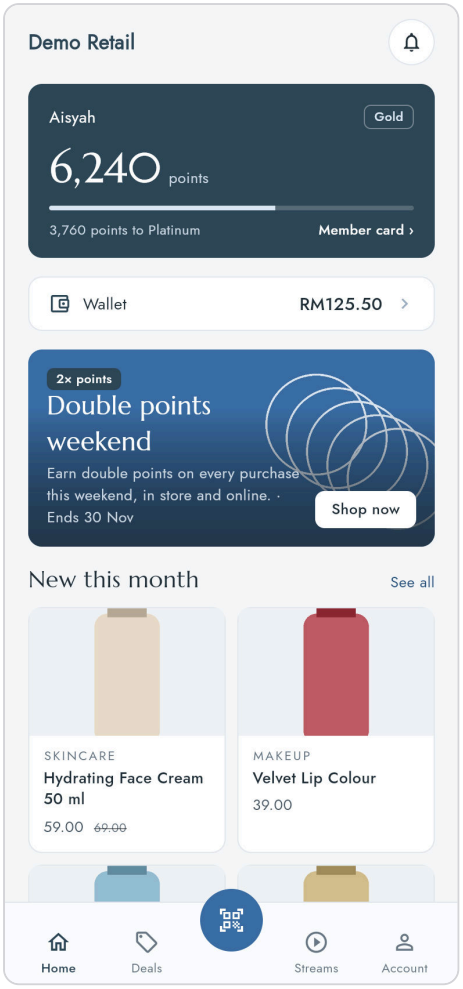
Sign out

Open the **Account** tab and press **Sign out** at the bottom.

Find your way around

For: Customers

Home is the first screen after you sign in.



From the top:

- **The bell** at the top right opens your **Inbox** (see the last page: it does not show your own messages yet).
- **The points card** shows your display name, your points, your tier (for example **Gold**) and how many points you need for the next tier. Press **Member card ›** to open your member QR.
- **Wallet** shows your wallet balance. Press it to open the wallet.
- **The deal banner** shows one current deal. **Shop now** opens the shop.
- **New this month** shows new products. **See all** opens the shop.

Pull the screen down to reload it.

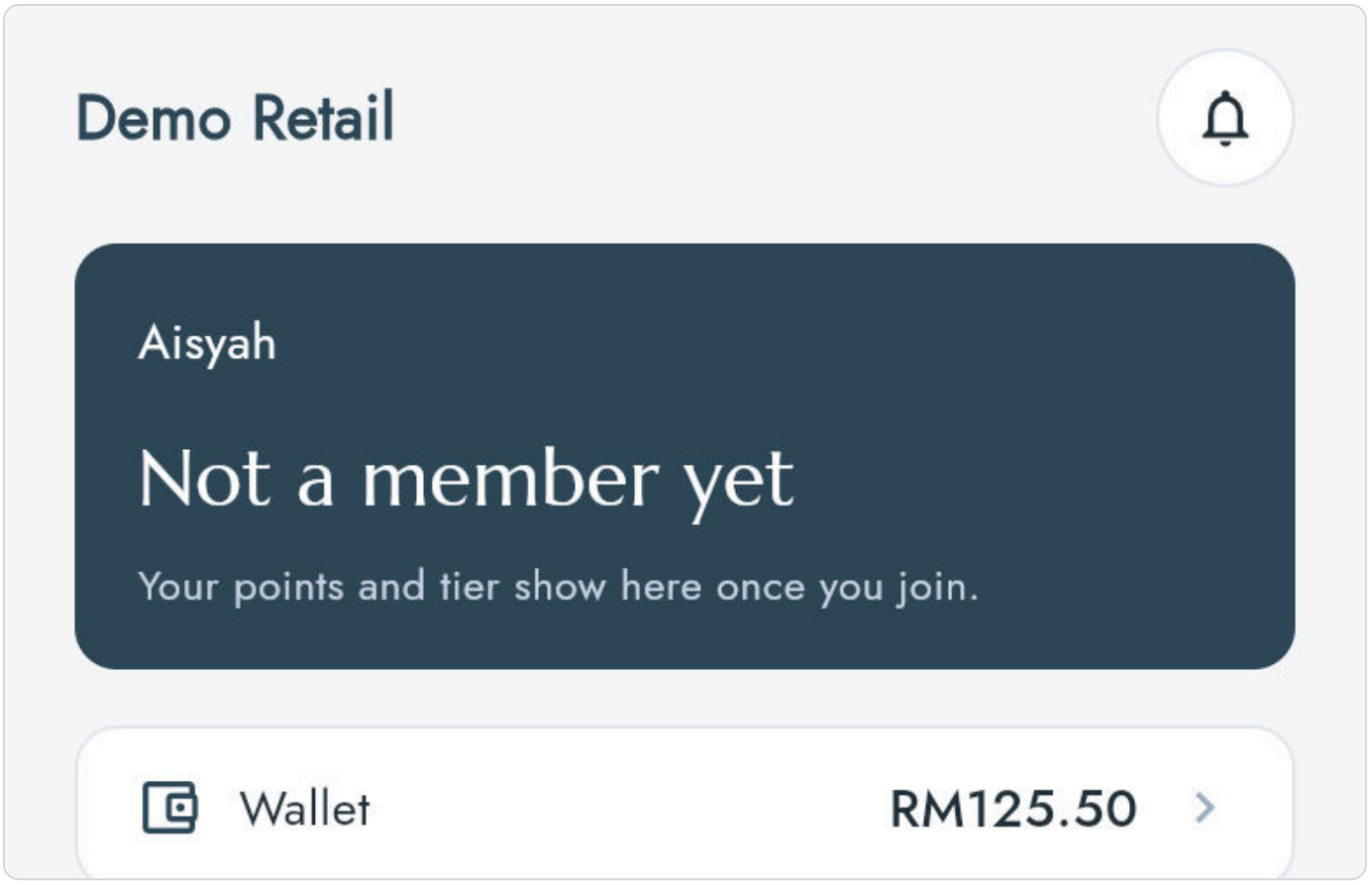
The bar at the bottom

Button	What it opens
Home	This screen
Deals	All current deals
The round button in the middle	**Scan**, the camera
Streams	Your company's videos
Account	Your details, member card, vouchers, help and sign-out

Your membership and points

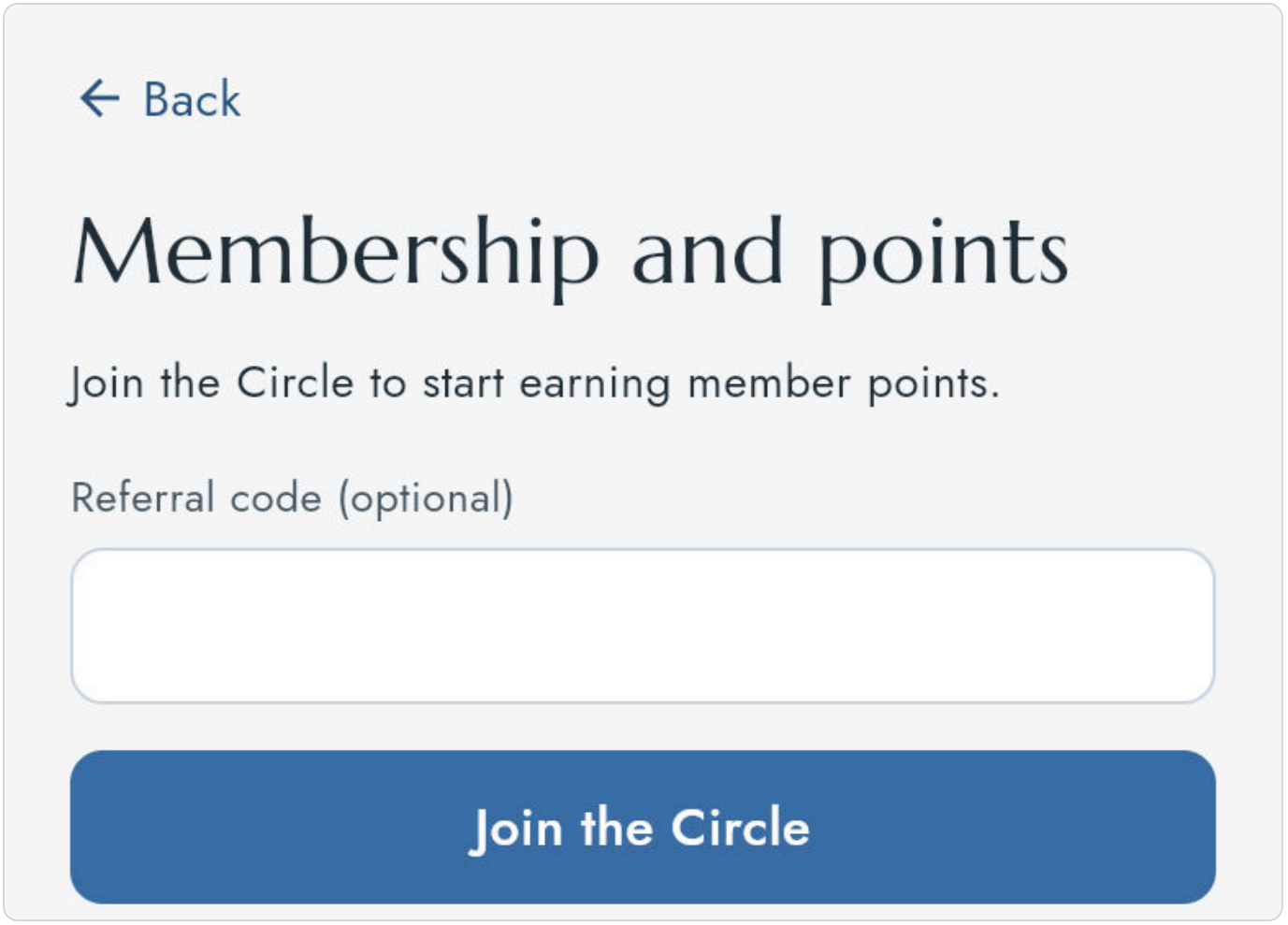
For: Customers

Creating an account does not make you a member. Until you join, the points card on **Home** says **Not a member yet**.



Join

1. Open the **Account** tab and press **Member card**.
2. If a friend gave you a referral code, type it in **Referral code (optional)**.
3. Press **Join the Circle**.

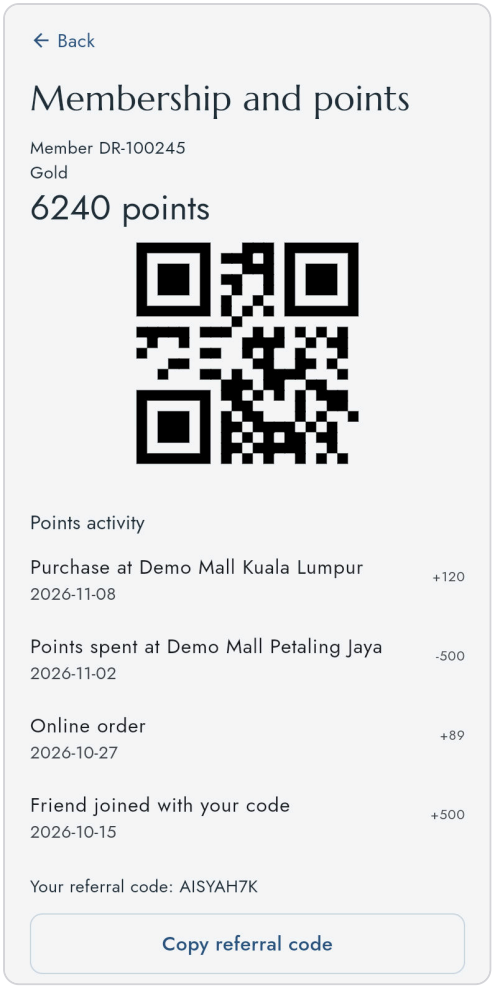


The screen reloads with your member number, tier and points.

Show your member QR and check your points

Press **Member card ›** on Home, or **Member card** on the **Account** tab. The **Membership and points** screen shows:

- your **Member** number and tier;
- your points balance;
- a QR code to show at the counter when you pay;
- **Points activity**: each time points were added or spent, with the date;
- **Your referral code**. Press **Copy referral code** and send it to a friend.



How many points a purchase earns, and what a referral is worth, is set in Membership and Loyalty. The app only shows the result.

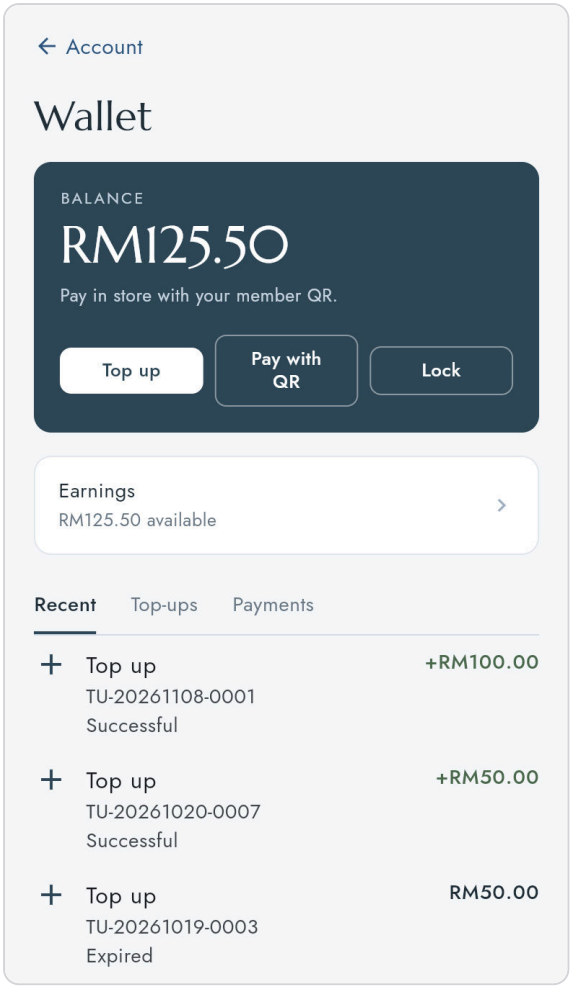
SUPERAPP (MOBILE)

Top up your wallet

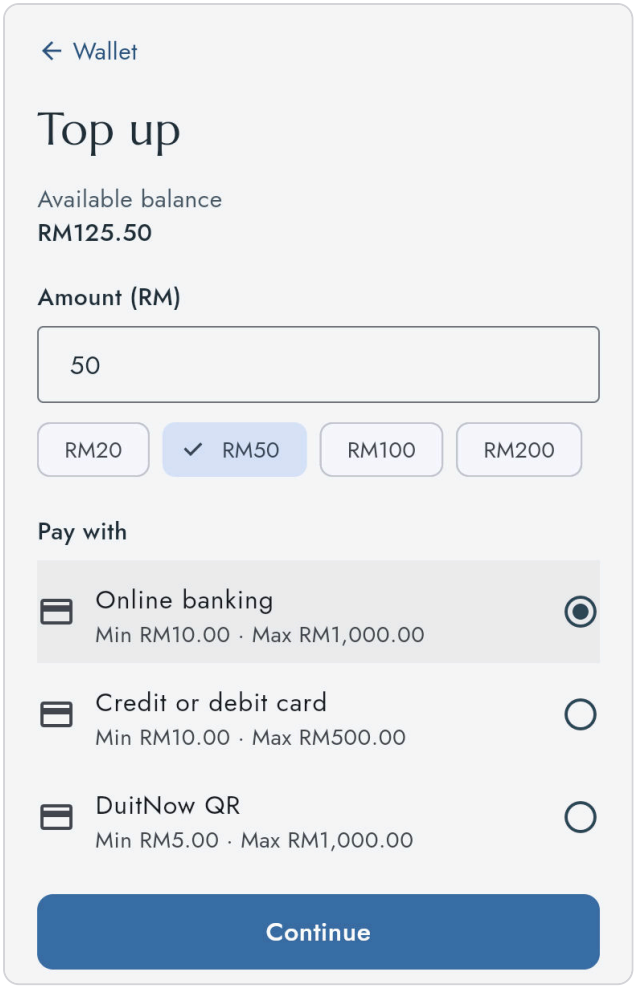
For: Customers

The wallet holds money you have paid in. It can only be used with your company.

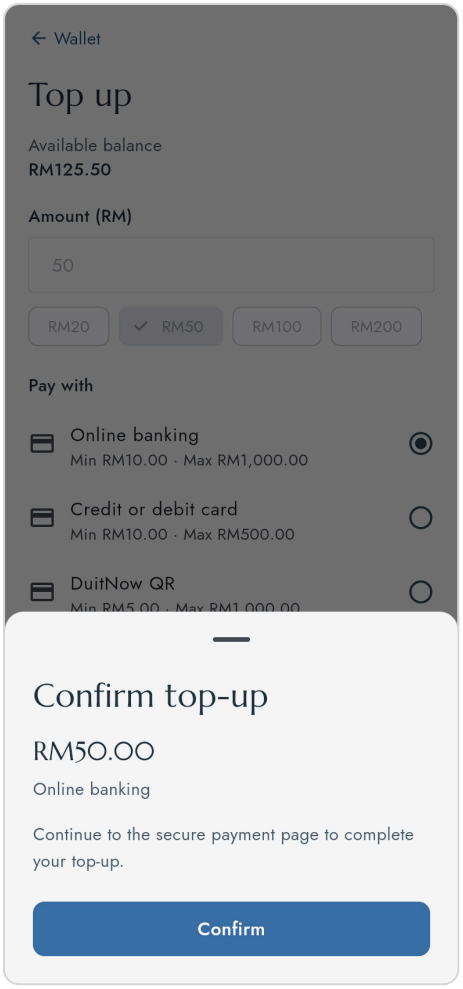
1. On **Home** press **Wallet**, or on the **Account** tab press **Manage**.



2. Press **Top up**.
3. Type the **Amount (RM)**, or press one of the amounts under it (for example **RM50**).
4. Under **Pay with**, choose how to pay. Each way shows its lowest and highest amount.
5. Press **Continue**.



6. Check the amount and press **Confirm**. The payment page of your company's payment provider opens. Pay there.



7. Come back to the app. When the payment has gone through, the app returns to the wallet with the new balance.

Check a top-up

The list under the balance shows each top-up with its reference and status: **Successful**, **Pending**, **Failed** or **Expired**. Press **Top-ups** above the list to see top-ups only.

A top-up that stays **Pending** has not been paid yet, or the payment provider has not confirmed it. An **Expired** top-up was never paid and took no money. If money left your bank but the top-up is not **Successful**, contact your company with the reference (it starts with **TU-**).

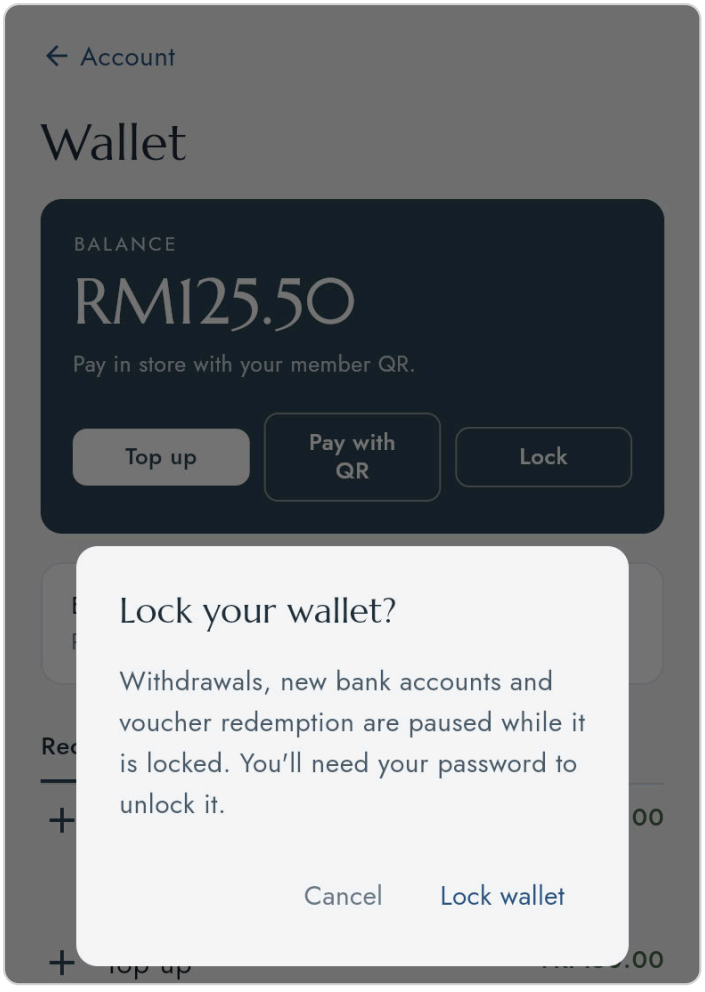
Lock your wallet

For: Customers

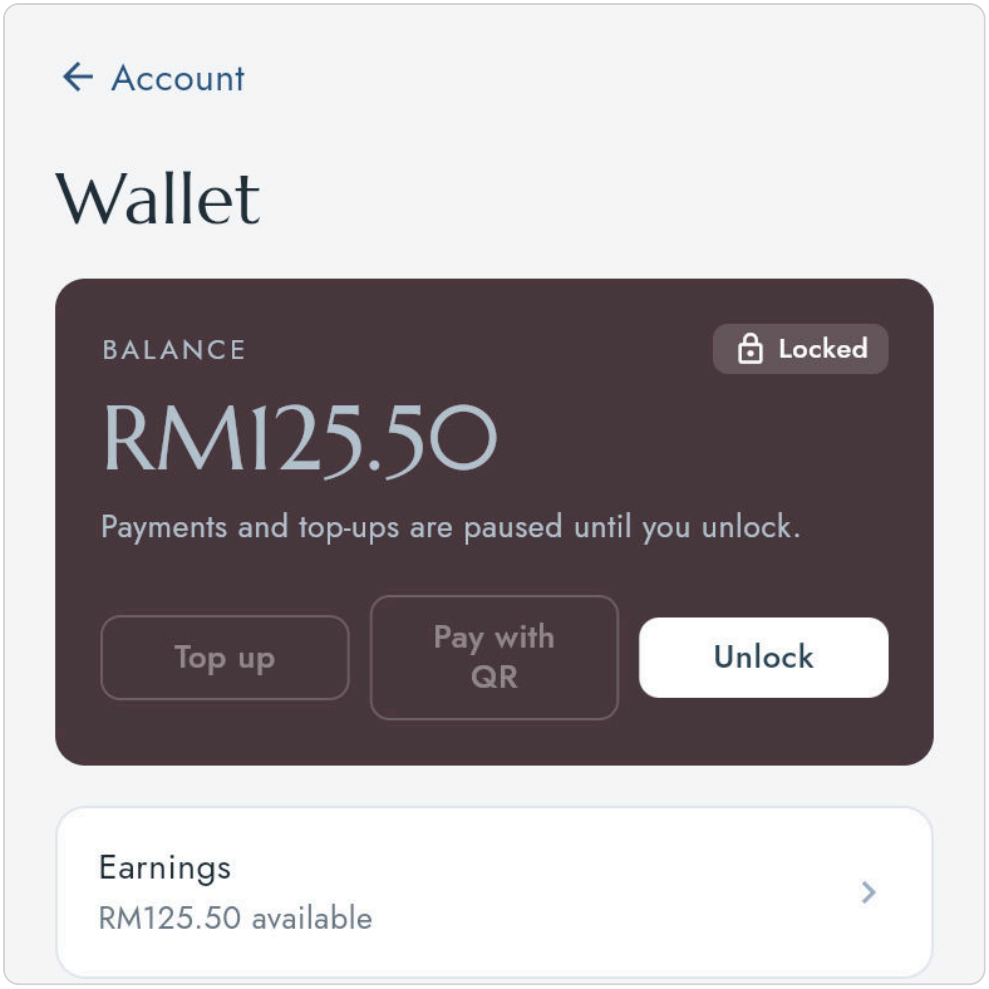
Lock the wallet if your phone is lost or you think someone else is using your account. While it is locked, withdrawals, new bank accounts and voucher redemption are paused, and **Top up** and **Pay with QR** cannot be pressed.

Lock it

1. Open the wallet (**Wallet** on Home).
2. Press **Lock**, then **Lock wallet**.

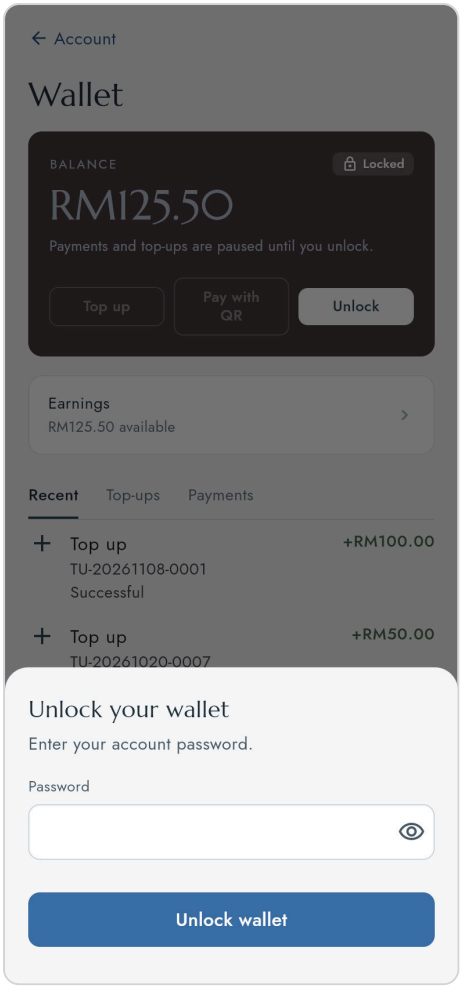


The balance card turns dark and shows **Locked**.



Unlock it

1. Press **Unlock**.
2. Type the password you sign in with and press **Unlock wallet**.

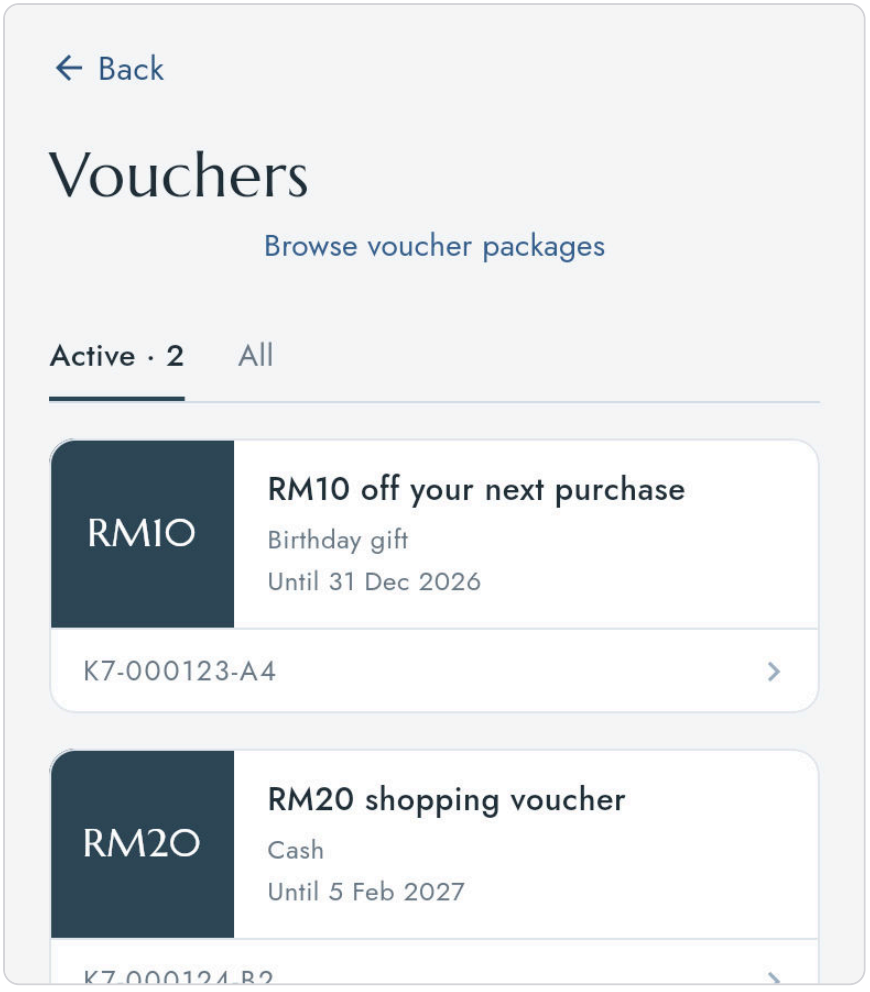


If the app says your wallet was suspended, your company has stopped it. Only your company can lift that. Press **Get help** or contact them.

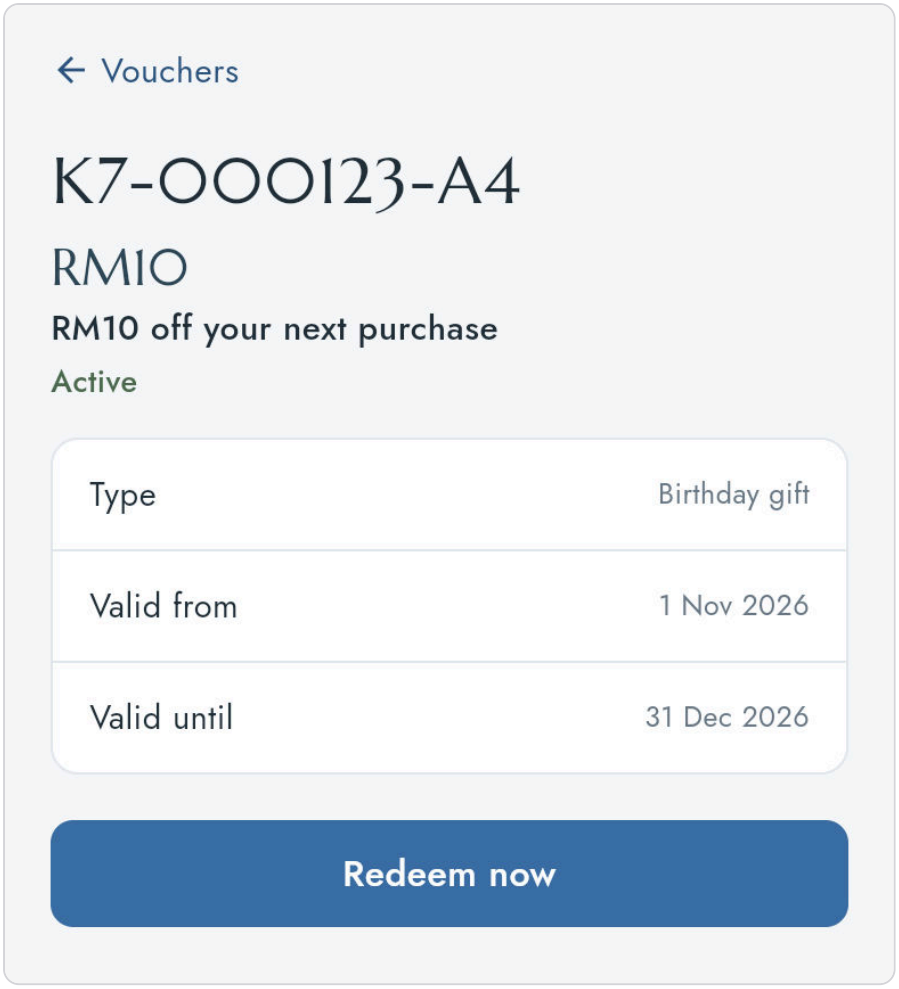
Use your vouchers

For: Customers

1. Open the **Account** tab and press **Vouchers**. The number next to it is how many you can use now.
2. **Active** lists vouchers you can use now. **All** also shows used, expired and future ones.

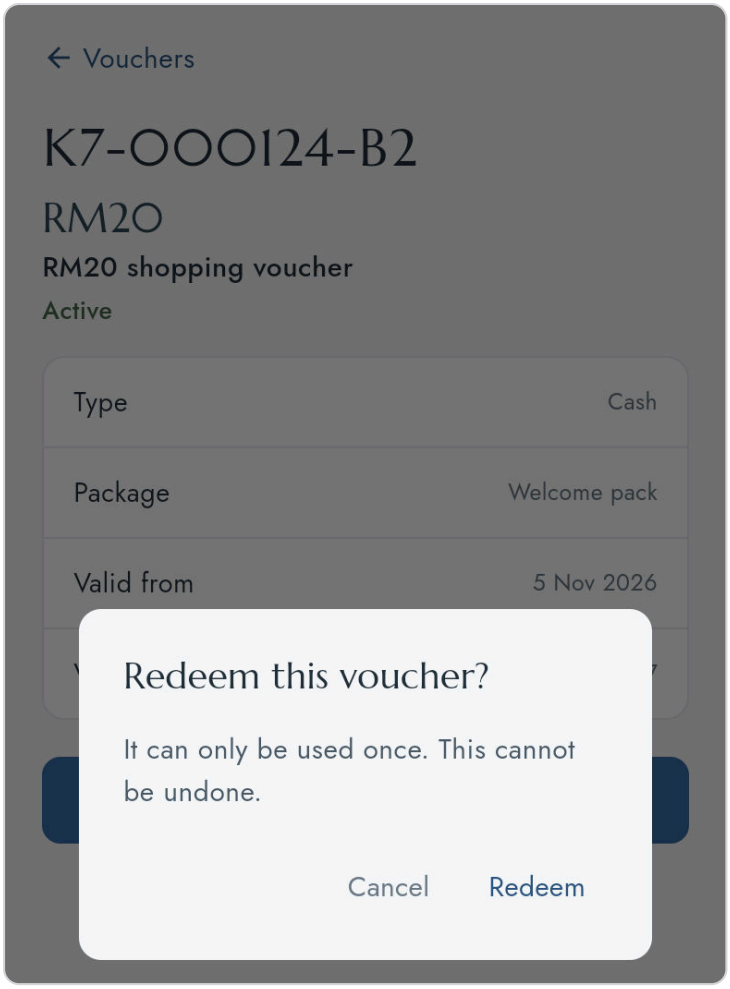


3. Press a voucher to see its code, type, package and the days it is valid.

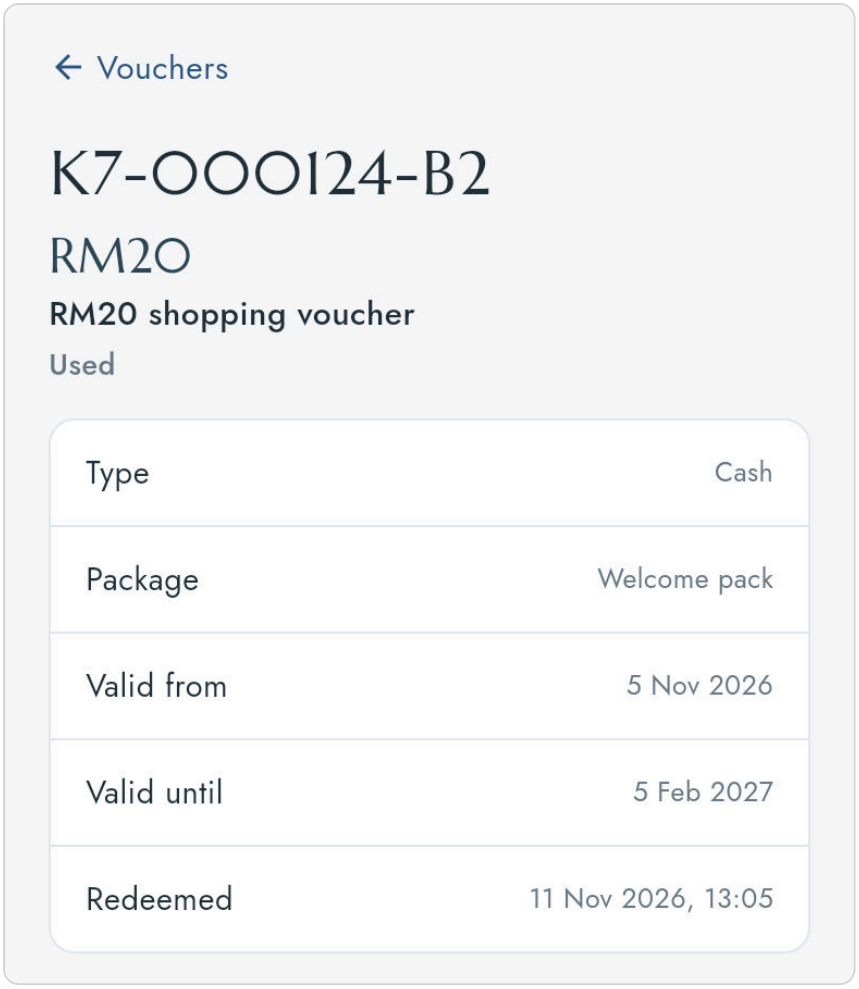


Redeem a voucher

Press **Redeem now**, then **Redeem**. A voucher can be used only once and this cannot be undone, so press it only when you are using the voucher.



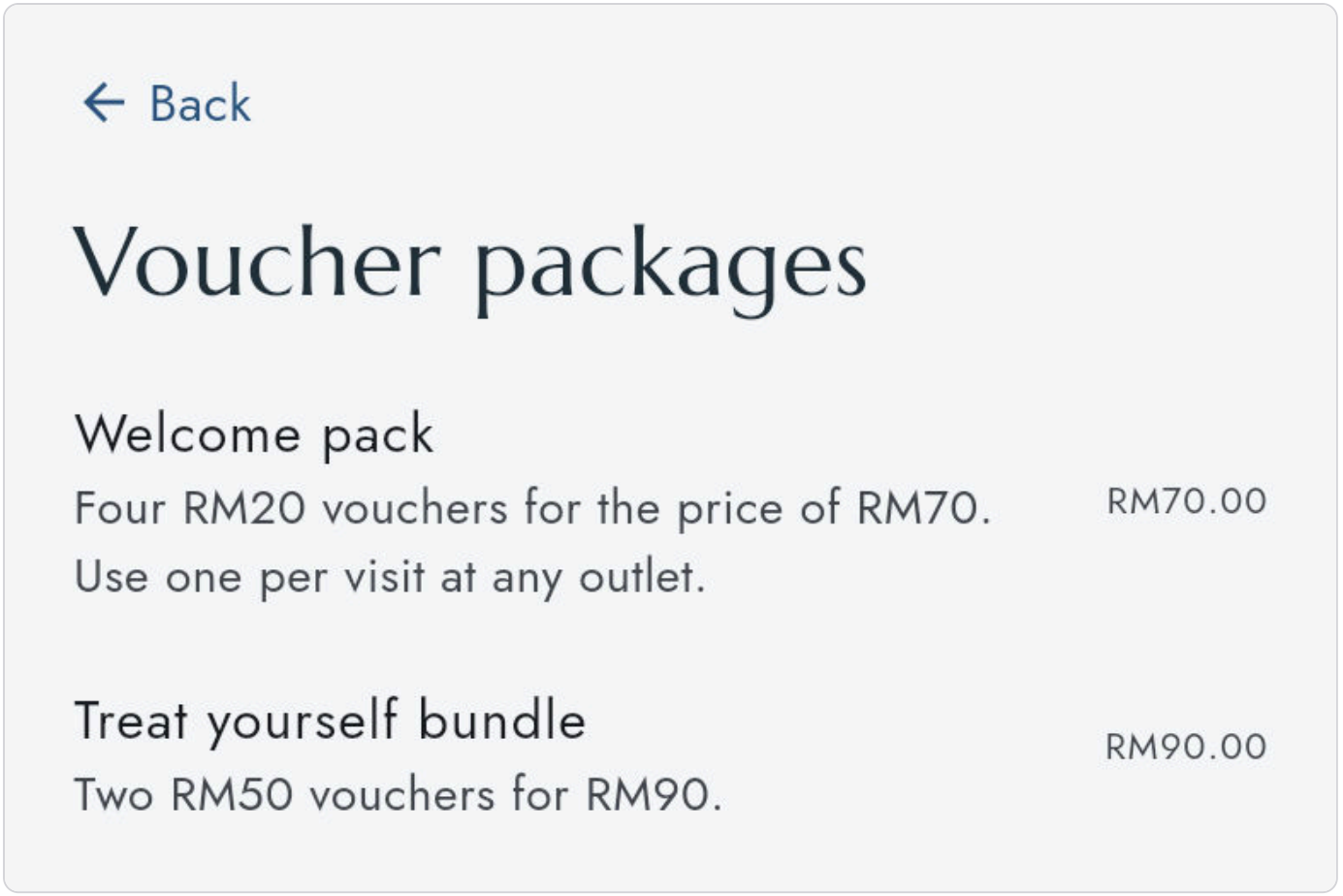
The voucher then shows **Used** and the date and time it was redeemed.

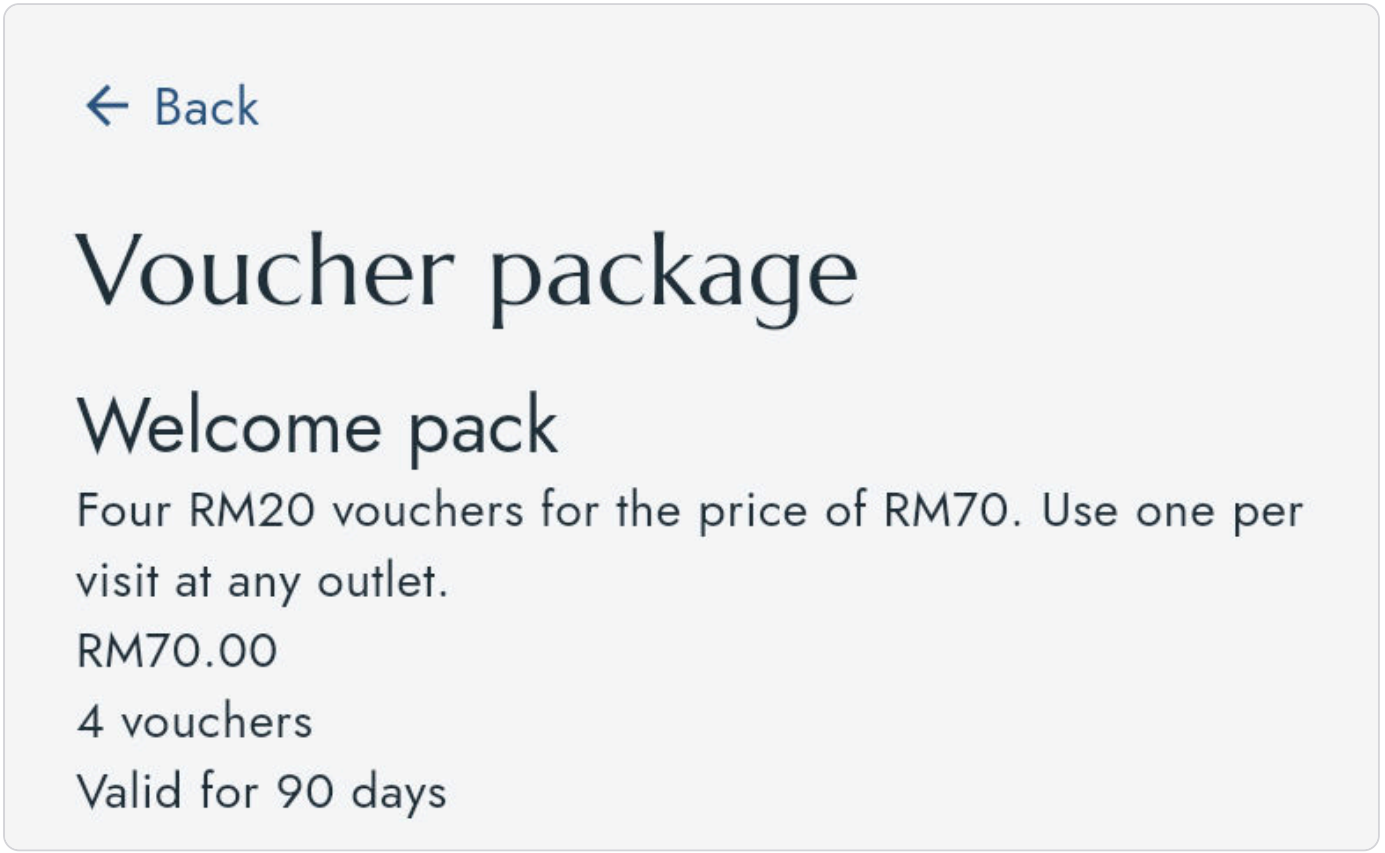


A voucher that starts later cannot be redeemed until its **Valid from** day. A locked wallet cannot redeem vouchers.

Voucher packages

Browse voucher packages at the top of **Vouchers** lists the packages your company sells, with their price. Press one to see how many vouchers it holds and how long they last.



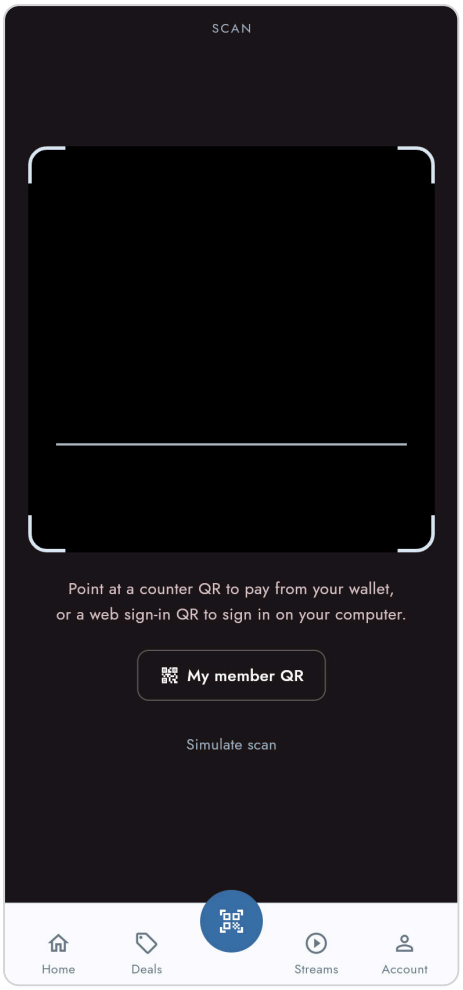


There is no button to buy a package in the app yet. The list is for reading only.

The Scan button

For: Customers

The round button in the middle of the bottom bar opens **Scan**, the camera. The first time, the phone asks to allow the camera. If you said no, the screen says **Camera access is off**; press **Open Settings** and allow it.



Sign in on a computer

When a website of your company shows a QR code for signing in:

1. Open **Scan** and point the camera at the code on the computer screen.
2. The app asks **Sign in on the web?**. Approve only a code you scanned from your own screen.
3. Press **Sign in**. The computer is now signed in to your account.

Show your member QR

Press **My member QR** to open your member card and its QR code.

Paying at the counter does not work yet

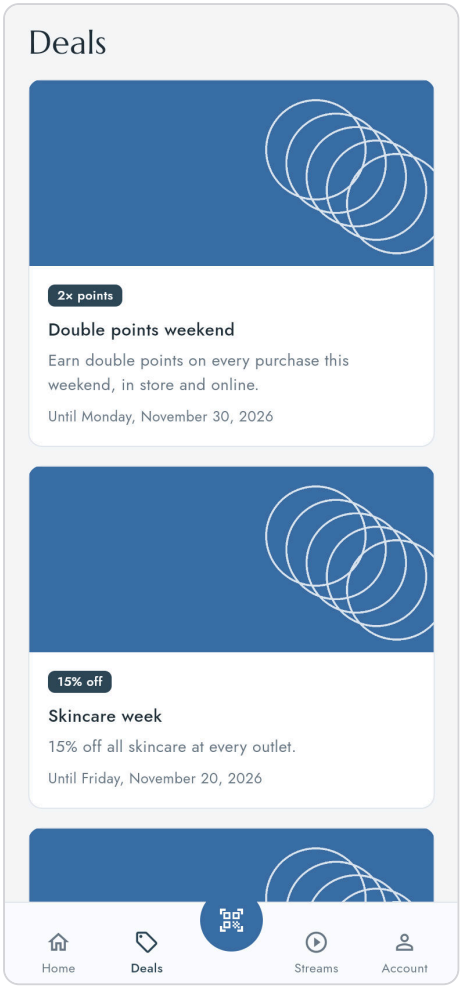
The screen says you can point it at a counter QR to pay from your wallet. In this version that does not take any money: the app shows a sample payment with a fixed amount that is never sent to your company, and your real wallet balance does not change. The **Simulate scan** link under the buttons does the same. Pay at the counter the usual way until your company says wallet payments are open.

Deals and the shop

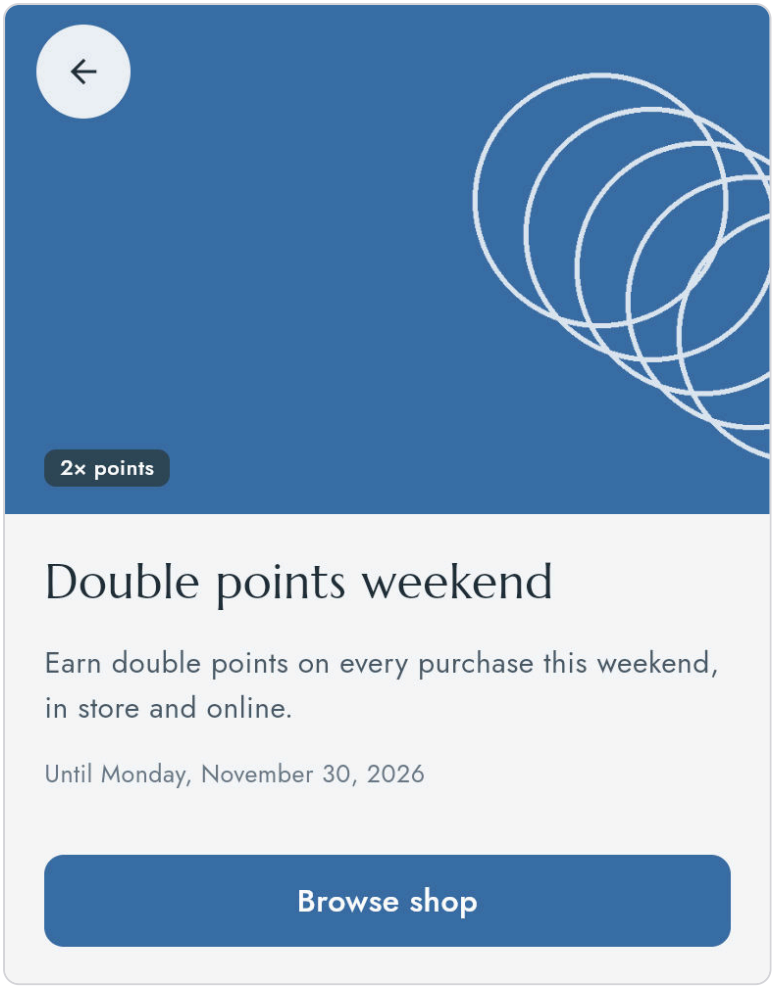
For: Customers

Deals

Press **Deals** in the bottom bar. Each card shows the deal's name, what it gives and its last day.

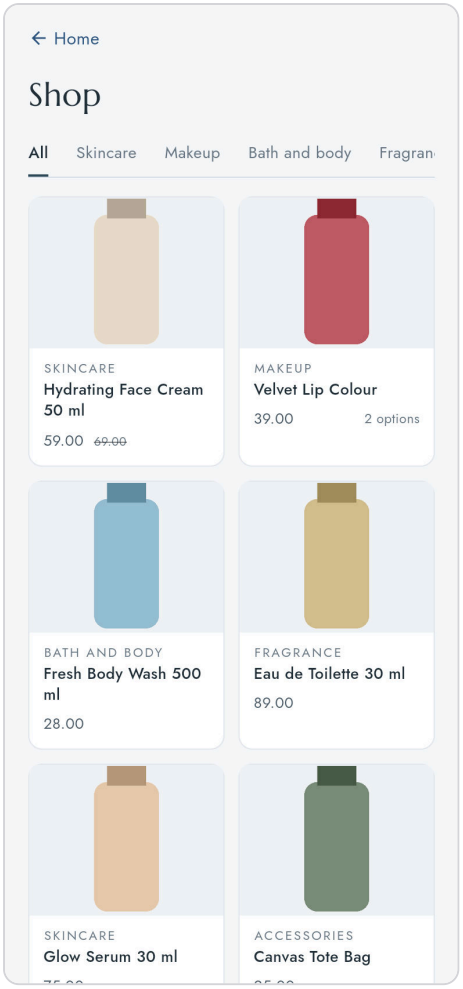


Press a deal to read it in full. **Browse shop** opens the shop.

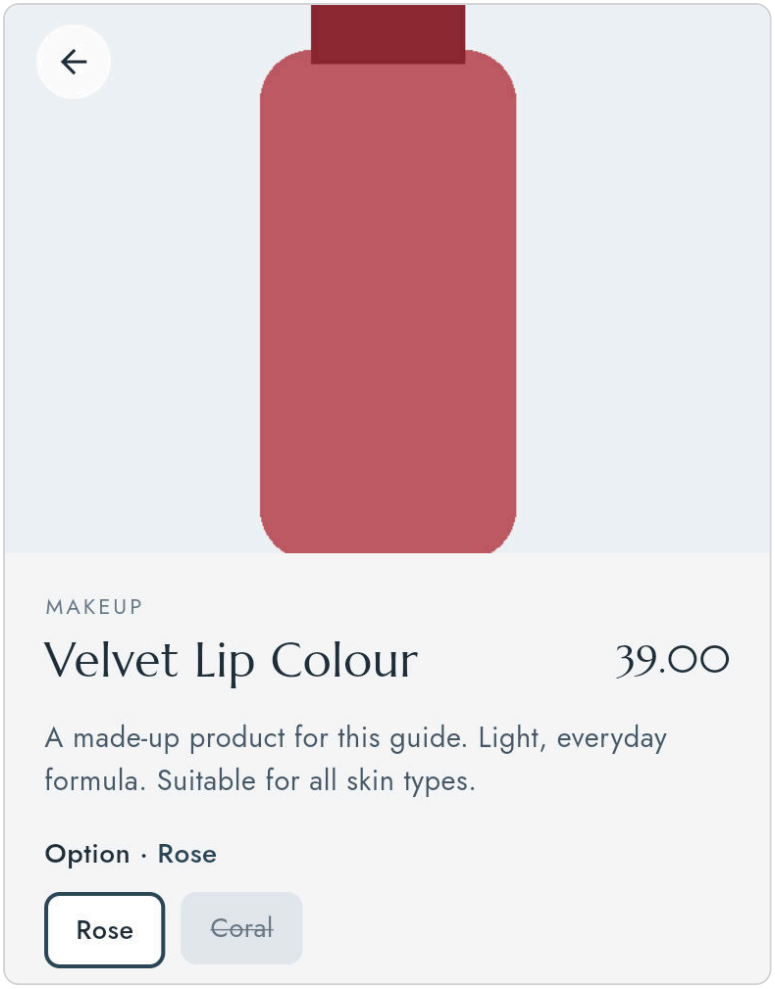


The shop

Open the shop from **Shop now** or **See all** on Home, or **Browse shop** on a deal. Press a category at the top (for example **Skincare**) to see only those products. A crossed-out price is the price before the discount.



Press a product to read about it. If it comes in more than one option (for example shades or sizes), press an option to see its price. A greyed option is out of stock.

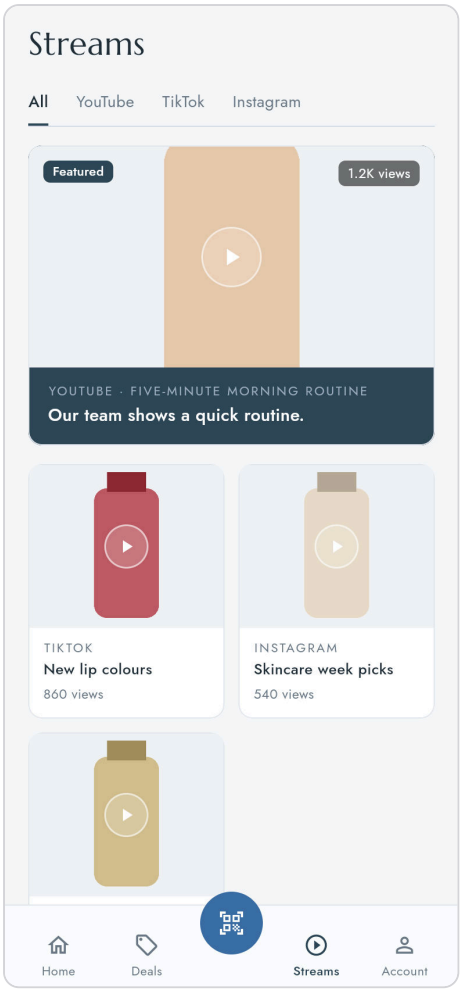


You cannot buy in the app yet: there is no bag and no checkout. The shop is for looking. Buy at an outlet or on your company's online shop.

Watch streams

For: Customers

Streams in the bottom bar shows your company's videos from sites such as YouTube, TikTok and Instagram.



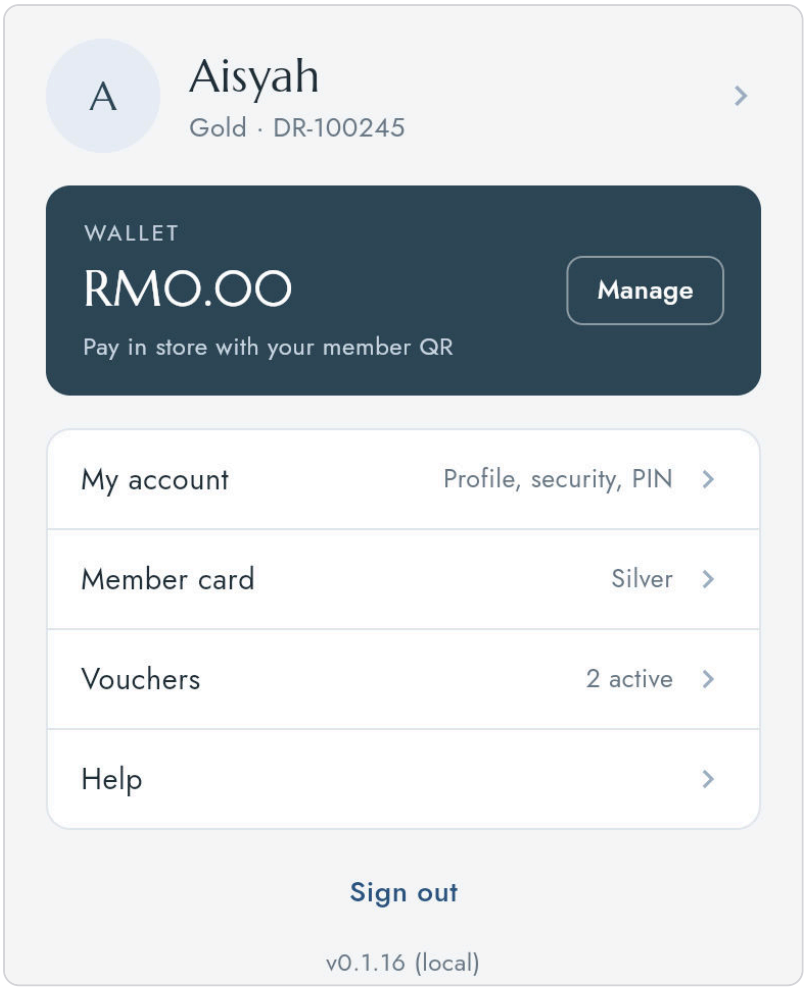
1. Press a tab at the top to see videos from one place only, or **All**.
2. Press a video to play it. It plays inside the app.
3. Scroll down for more videos. If they do not appear, press **Load more videos**.

Your account

For: Customers

The **Account** tab shows your name, tier and member number at the top, a wallet card with **Manage**, and these rows:

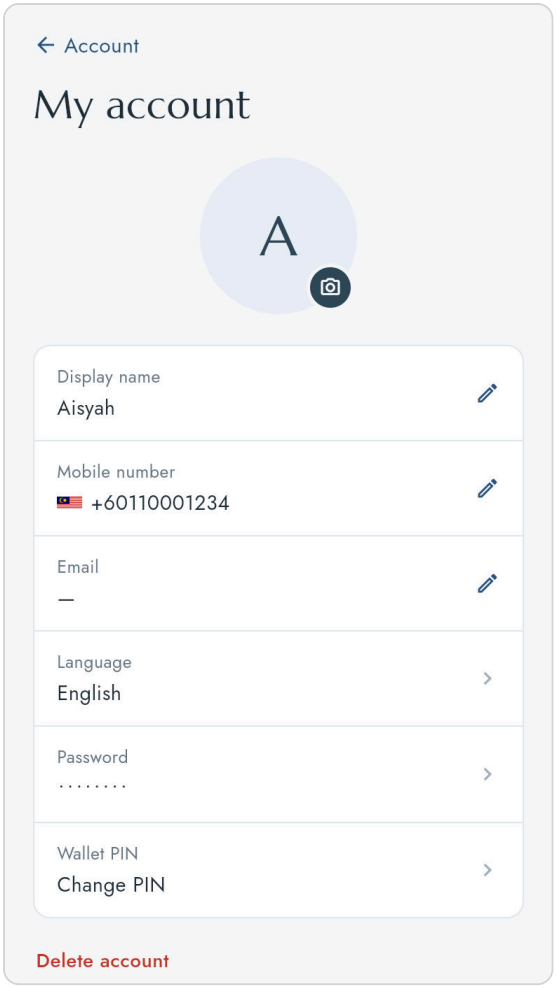
- **My account**: your details and security.
- **Member card**: your member QR and points (see "Your membership and points").
- **Vouchers**: see "Use your vouchers".
- **Help**: your company's help pages.



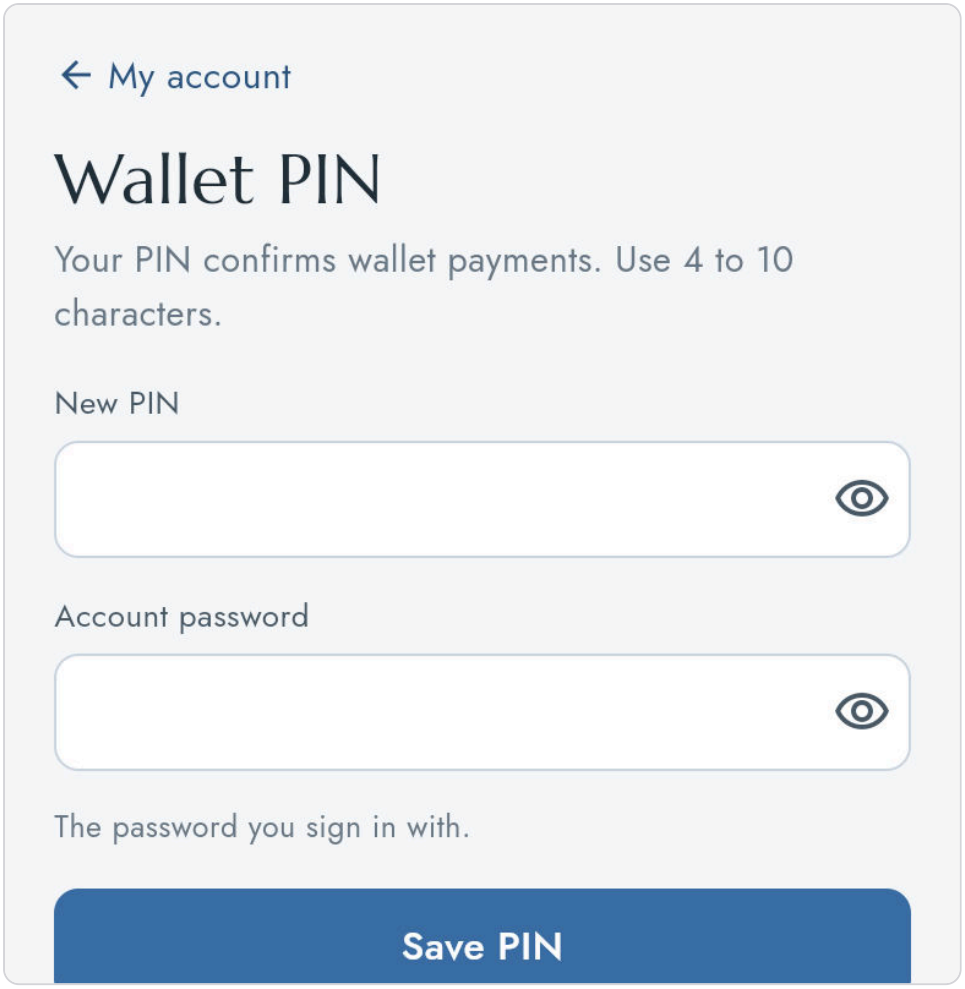
The wallet amount and the tier shown on this tab are not read from your company yet (see the last page). Open the wallet and the member card for the right figures.

Change your details

Press **My account**. Press a row to change it.

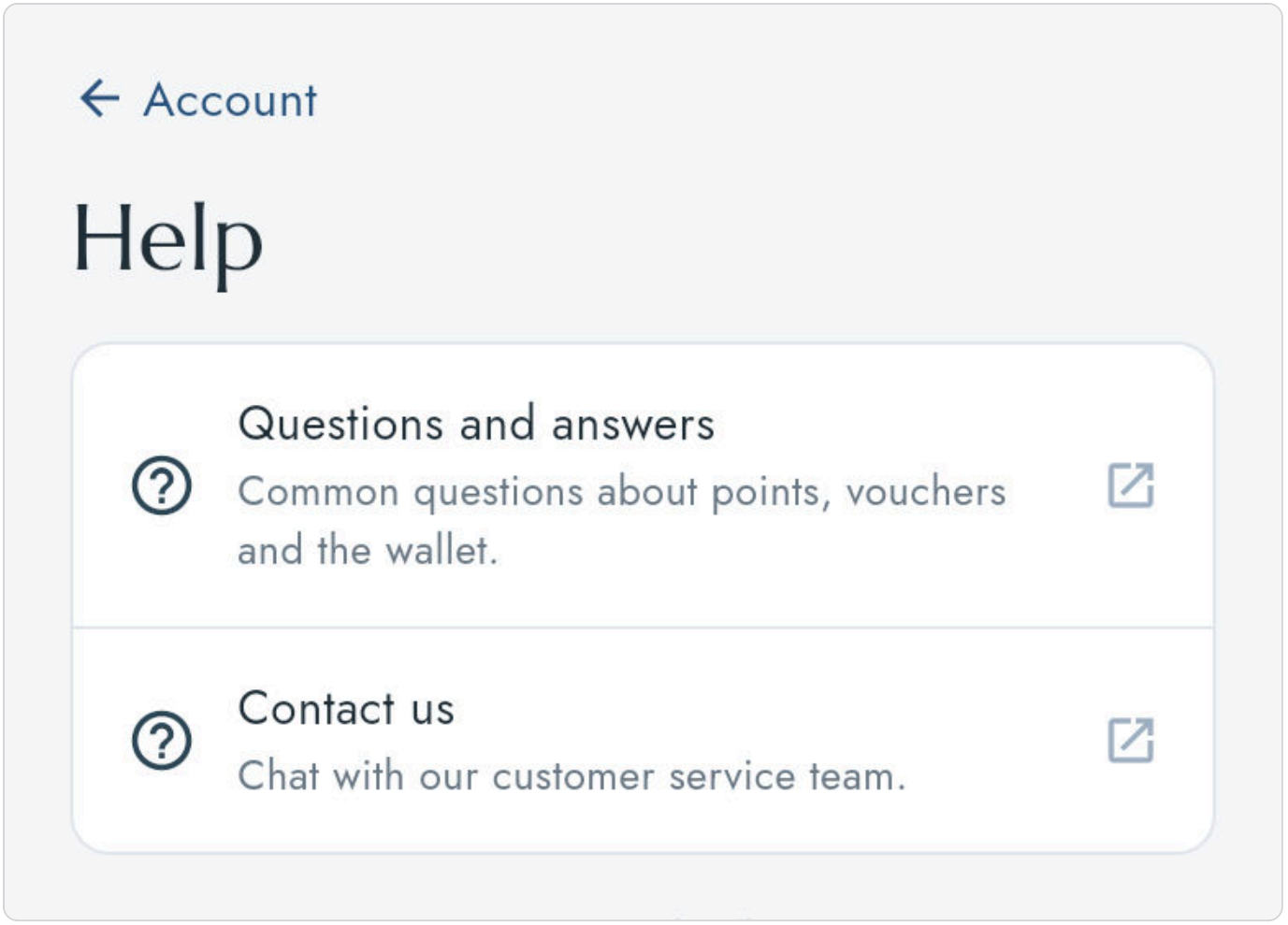


Row	What happens
The photo	**Profile photos**: add photos from the **Gallery** or **Camera**. The first one is your profile picture; hold and drag a photo to change the order. Photos over 2 MB are shrunk to fit.
Display name	Type the new name and press **Save**.
Mobile number	Type the **New mobile number** and your **Current password**, press **Send code**, then type the code sent to the new number.
Email	Type the **New email** and your **Current password**, press **Send code**, then type the code sent to the new address.
Language	Choose English, 中文, Bahasa Melayu or Tagalog. This is saved to your account, but the app's own screens stay in English.
Password	Type the **Current password**, the **New password** twice, and press **Save**.
Wallet PIN	Type a **New PIN** of 4 to 10 characters and your **Account password**, then press **Save PIN**.



Get help

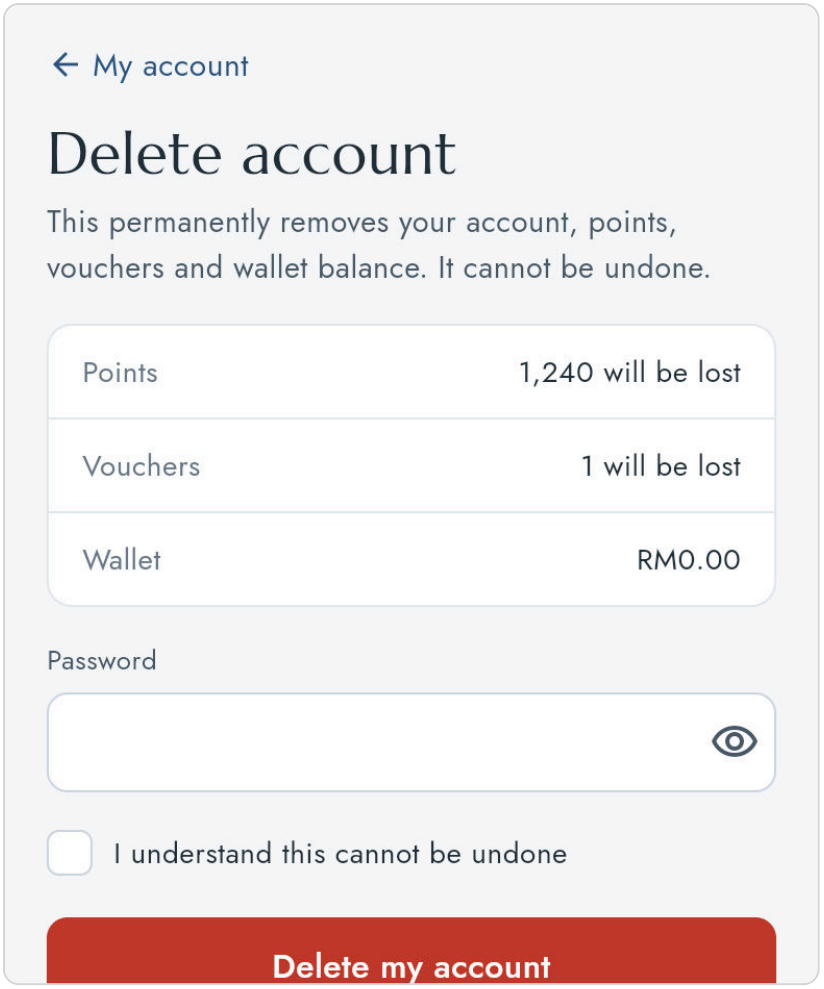
Press **Help** on the **Account** tab. Each row opens one of your company's help pages in the browser.



Delete your account

1. In **My account** press **Delete account**.
2. Type your password, tick **I understand this cannot be undone** and press **Delete my account**.

Your account, points, vouchers and wallet balance are removed for good. Spend the wallet balance and vouchers first.

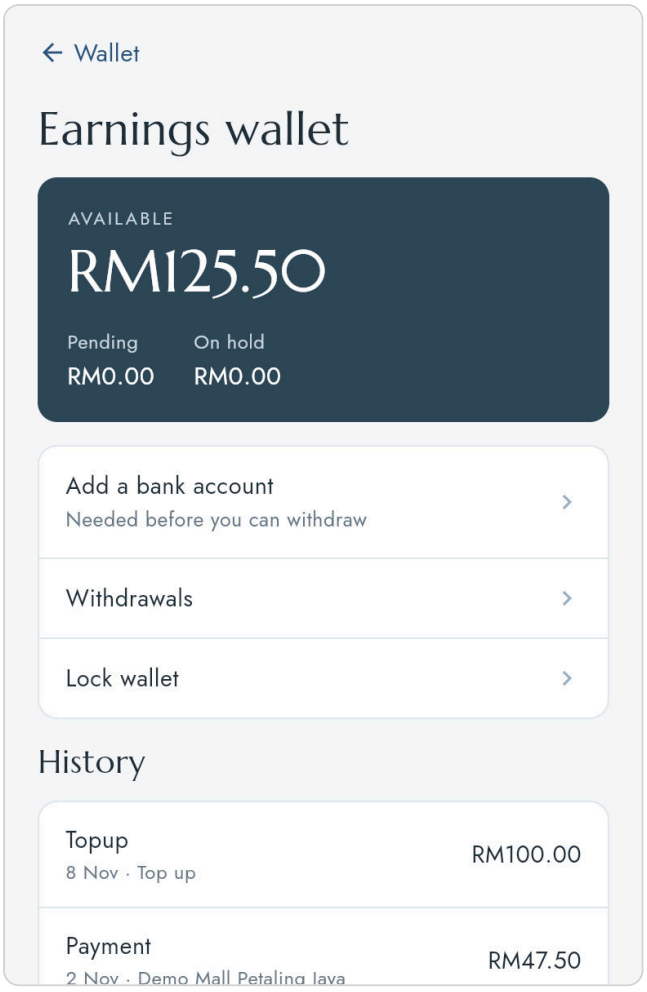


The amounts listed under **Points** and **Wallet** on this screen are not your real ones yet (see the last page).

Withdraw to a bank

For: Customers

Under the wallet balance there is an **Earnings** row. It opens the **Earnings wallet**, where money can be sent from the wallet to a bank account. Your company decides who may withdraw, and checks each withdrawal before it is paid. If you are not sure you may withdraw, ask your company first.

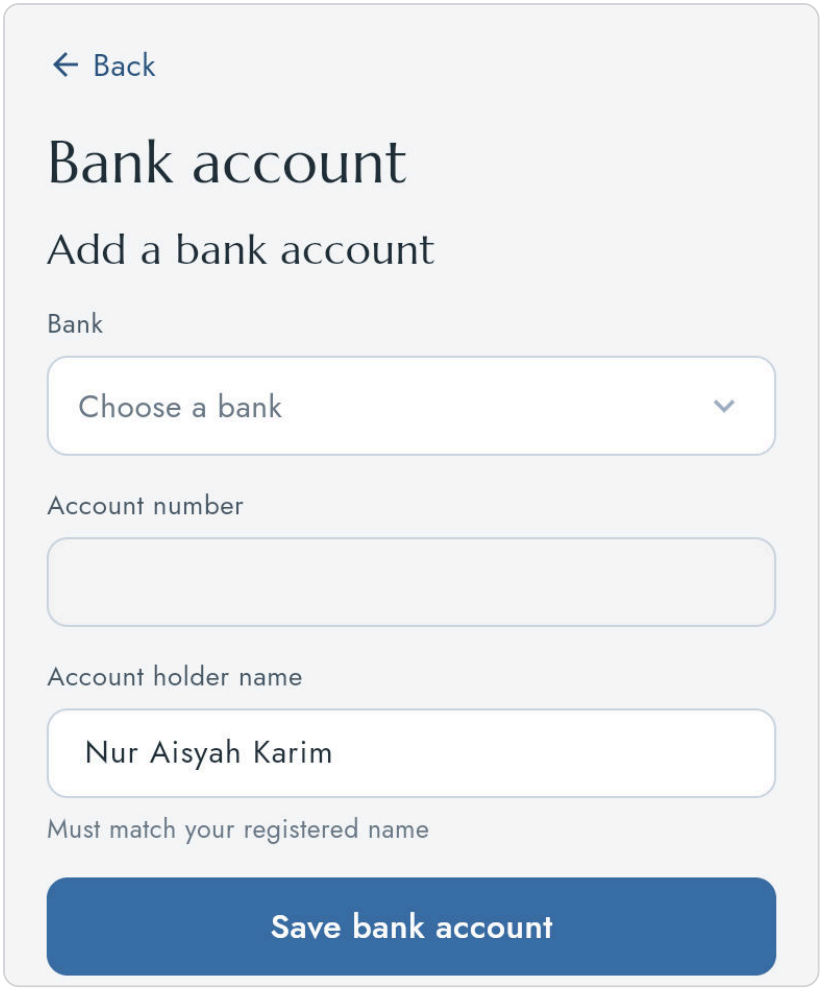


- **AVAILABLE** is what you can withdraw now. **Pending** and **On hold** cannot be withdrawn yet.
- **History** lists each money movement in and out of the wallet.

Add your bank account

1. Press **Add a bank account**.
2. Choose the **Bank** and type the **Account number**. The **Account holder name** must match the name on your account.

3. Press **Save bank account**, then **Done**. The account shows as **Unverified** until it has been checked, usually within 2 working days. You can withdraw once it is verified.



Withdraw

1. Once your bank account is added, the **Earnings wallet** shows **Withdraw to bank**. Press it.
2. Type the **Amount (RM)** and press **Request withdrawal**. The money goes to your bank account on file.
3. **Withdrawals** lists each request and its status until it is paid.

What does not work yet

For: Everyone

The app is still being built. A customer can see these things today, but they do not work for real yet. Tell your customers before they rely on them.

What the customer sees	What actually happens
Pay with QR on the wallet, and scanning a counter QR on **Scan**	No money is taken. The app shows a sample payment of a fixed amount at an outlet that is not yours, and the real wallet balance does not change.
Simulate scan on the **Scan** screen	A test button left in the app. It starts the same sample payment.
The bell on **Home** (**Inbox**)	Shows two built-in sample messages (an e-invoice and a referral) that are the same for every customer.
The wallet card on the **Account** tab	Shows RM0.00 (an amount kept on the phone), not the real balance. The **Wallet** screen shows the real one.
Member card on the **Account** tab	Always says **Silver**, whatever the customer's real tier. The **Member card** screen itself is right.
Delete account	The points and wallet amounts listed as "will be lost" are not the customer's real ones.
The shop	No bag and no checkout. Products can only be looked at.
Voucher packages	Can be read, not bought.
Language	Saved to the account, but the app's screens stay in English.
Wallet PIN	Can be set, but nothing in the app asks for it yet.
Rating a visit or giving feedback	The screen exists in the app, but no button leads to it.
A list of outlets	The screen exists in the app, but no button leads to it.

Points on the **Membership and points** screen are written without a comma (6240), while Home writes 6,240. Both are the same number.

Ask your technical team when each of these is planned.

USER GUIDE · VERSION 1

Broadcasting server

Send WhatsApp messages to many customers at once from a spreadsheet, using message templates WhatsApp has approved, and see what was delivered and read.

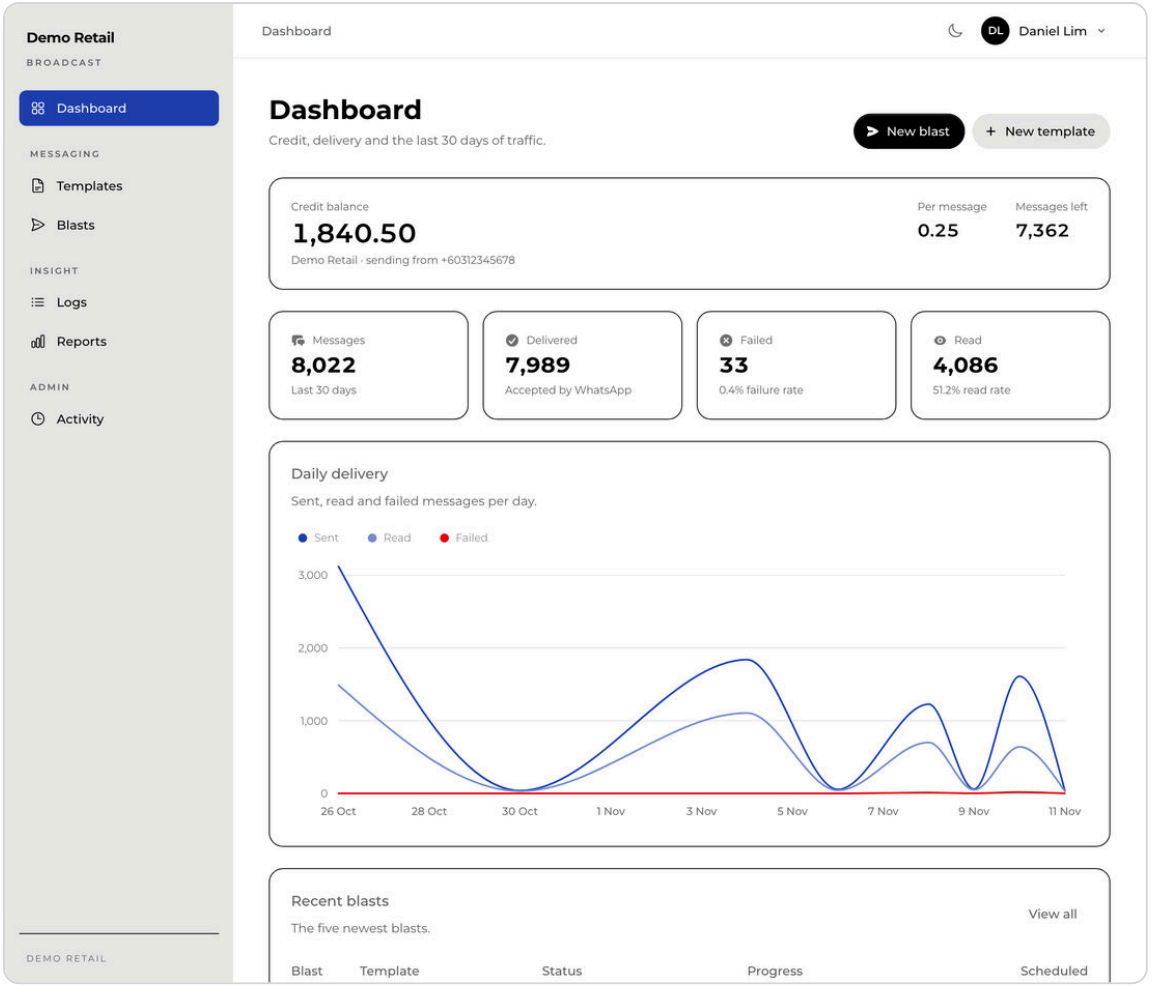
1. What it is for
2. Find a message template
3. Write or change a template
4. Send a blast
5. Follow a blast and resend failures
6. Check one customer's messages
7. See how messages performed
8. Add and remove people
9. See who did what, and set the branding

What it is for

For: Everyone

Broadcast sends WhatsApp messages to your customers in bulk: a promotion, a new outlet opening, a reminder about their points. You upload a customer list as a spreadsheet (a CSV file), pick a message, check it, and it goes out. Afterwards you see how many messages were delivered, read or failed.

The same sending service also carries the single messages other modules send, such as one-time codes. Those show up here under **Logs** and **Reports**.



A few words used on the screens

- **Template**: a message whose wording WhatsApp has approved in advance. WhatsApp only lets a business start a conversation with an approved template.
- **Placeholder**: a blank in a template, written like {{1}}, that each customer's own value fills (their name, their points).
- **Blast**: one sending of one template to a whole list of customers.

- **Meta**: the company that runs WhatsApp. It reviews every template.
- **Credit**: what the sending service charges. Every message uses a little credit (**Per message** on the Dashboard). **Messages left** is how many more messages the credit pays for.

Who uses it

Role	Can
Viewer	See templates, blasts, logs and reports. Cannot send or change anything.
Manager	Everything a viewer can, plus write templates, send and cancel blasts, resend failed messages, and see **Activity**.
Super admin	Everything, plus add people under **Users** and change **Branding**.

Signing in

Open Broadcast from the Portal home page, or sign in with your phone number. Only people a super admin has added under **Users** can sign in.

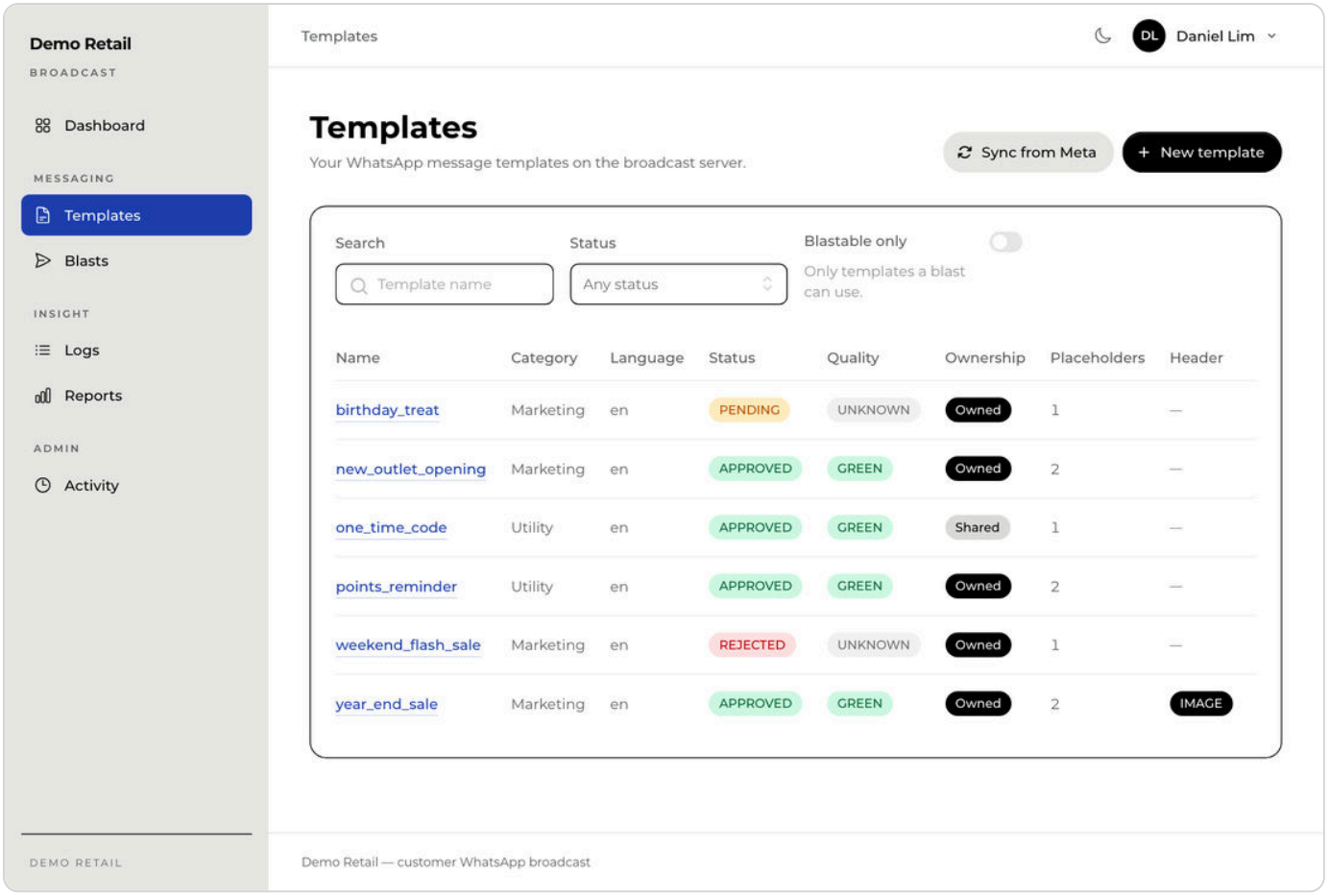
What it needs

- An account with the outside WhatsApp sending service, with credit on it. Credit is topped up with that service, not in Broadcast. If the Dashboard says **Credit is running low**, ask whoever manages that account to top it up.
- If the Dashboard says **Sending is switched off**, no WhatsApp number is connected to your account at the sending service and nothing can go out. Ask your technical team.

Find a message template

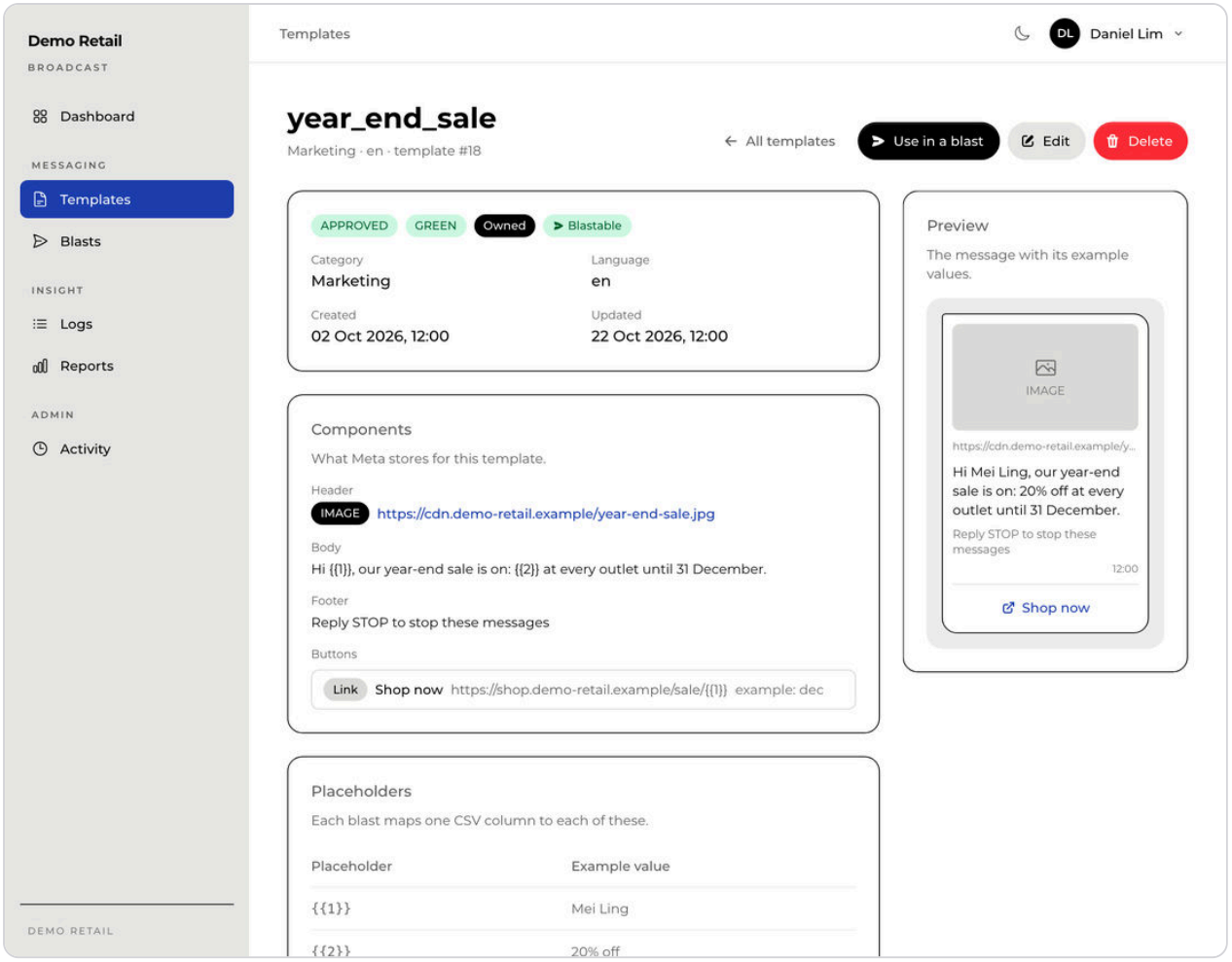
For: Managers and viewers

Open **Templates** in the menu on the left.



- **Status** is Meta's answer: **APPROVED** (ready to use), **PENDING** (still being reviewed) or **REJECTED** (not allowed; write a new one).
- **Quality** is how customers react to it. **GREEN** is good. Templates that many people block or report lose quality, and Meta can stop them.
- **Ownership**: **Owned** templates are your company's own. **Shared** ones are set up by the sending service for you to use; you cannot edit or delete them.
- Switch on **Blastable only** to see only the templates you can send in a blast.

Press a template's name to open it. The **Preview** on the right shows the message as a customer would see it, with example values in the blanks.



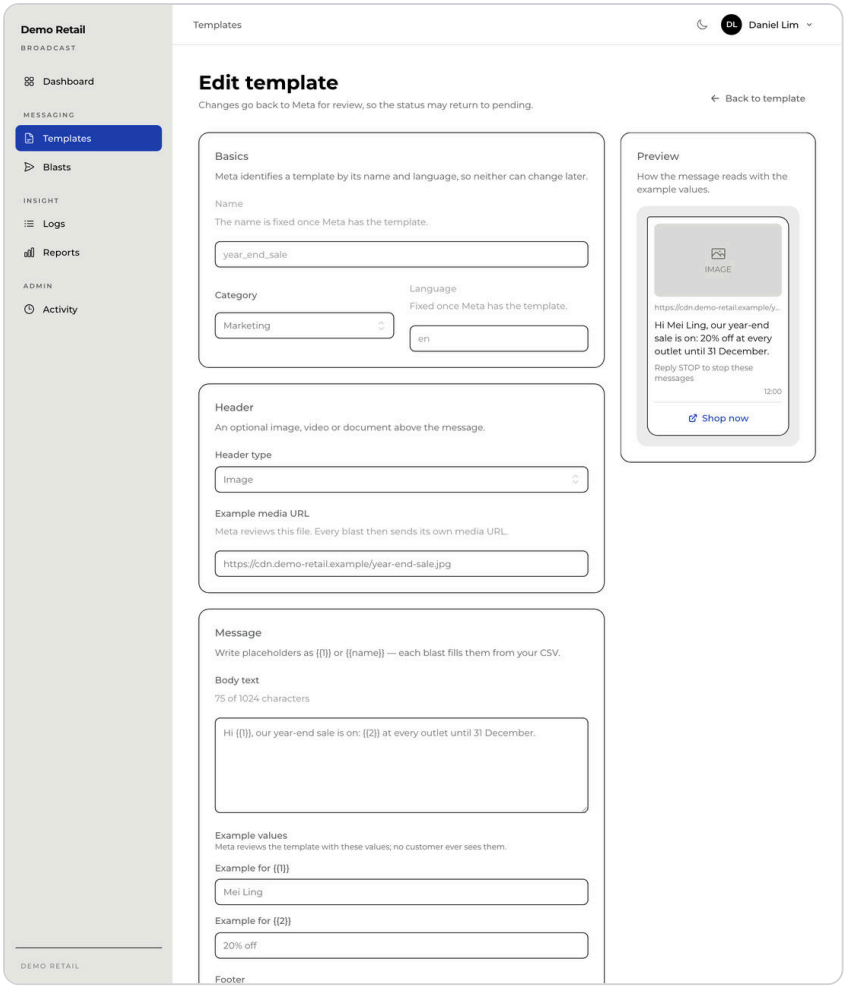
From here, **Use in a blast** starts a new blast with this template already chosen.

Sync from Meta (on the Templates list) fetches the latest status of every template from Meta. Use it when a template has been **PENDING** for a while.

Write or change a template

For: Managers

1. On **Templates**, press **New template**.
2. Under **Basics**, give it a **Name**: lowercase letters, numbers and underscores only (for example year_end_sale). Pick a **Category**: **Marketing** for promotions, **Utility** for information the customer expects, such as a points reminder. The name and language cannot be changed later.
3. Under **Header**, you can add a picture, video or document above the message. Give an **Example media URL** (a web link to a sample file) for Meta to review. Each blast then sends its own file.
4. Under **Message**, write the **Body text**. Put {{1}}, {{2}} and so on where each customer's own value goes, and fill in an **Example** for each one. Only Meta sees the examples.
5. Add a **Footer** if you want one (up to 60 characters, no blanks).
6. Under **Buttons**, add up to three: a quick reply or a link.
7. Check the **Preview** on the right, then press **Send to Meta**.



Meta reviews the template. It shows **PENDING** until Meta answers, usually within minutes but sometimes longer. You can only send it in a blast once it is **APPROVED**.

Change or delete a template

Open the template and press **Edit**, change it, then press **Save changes**. The change goes back to Meta, so the template may show **PENDING** again for a while.

Press **Delete** to remove a template. You cannot delete a template while a blast that uses it is still waiting or sending.

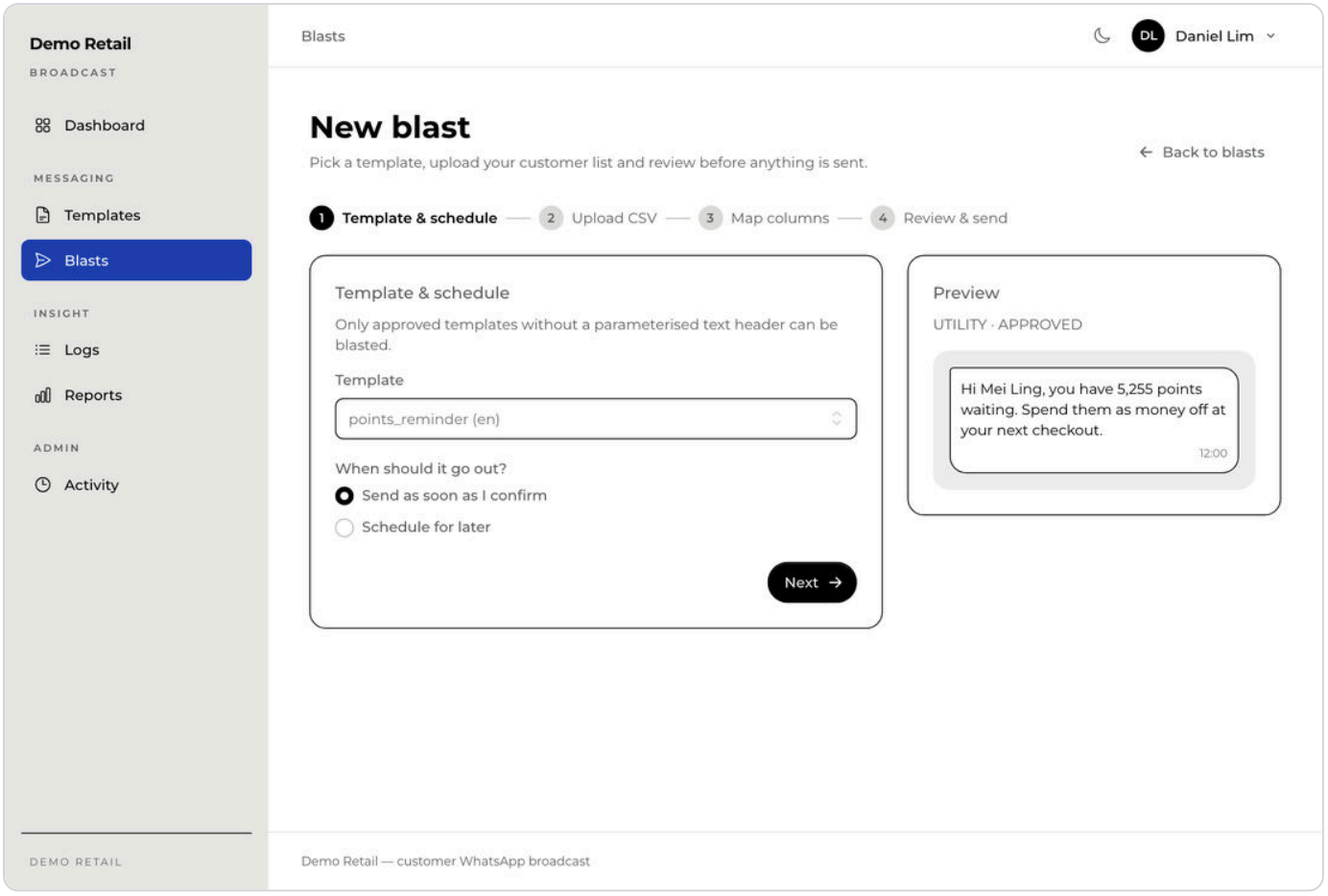
Send a blast

For: Managers

Before you start, prepare your customer list as a CSV file (a spreadsheet saved as CSV). Put the column names in the first row, one customer per row, with a column for the phone number and one for each blank in the template. Press **Download sample CSV** on step 2 for an example. One blast takes up to 10,000 customers.

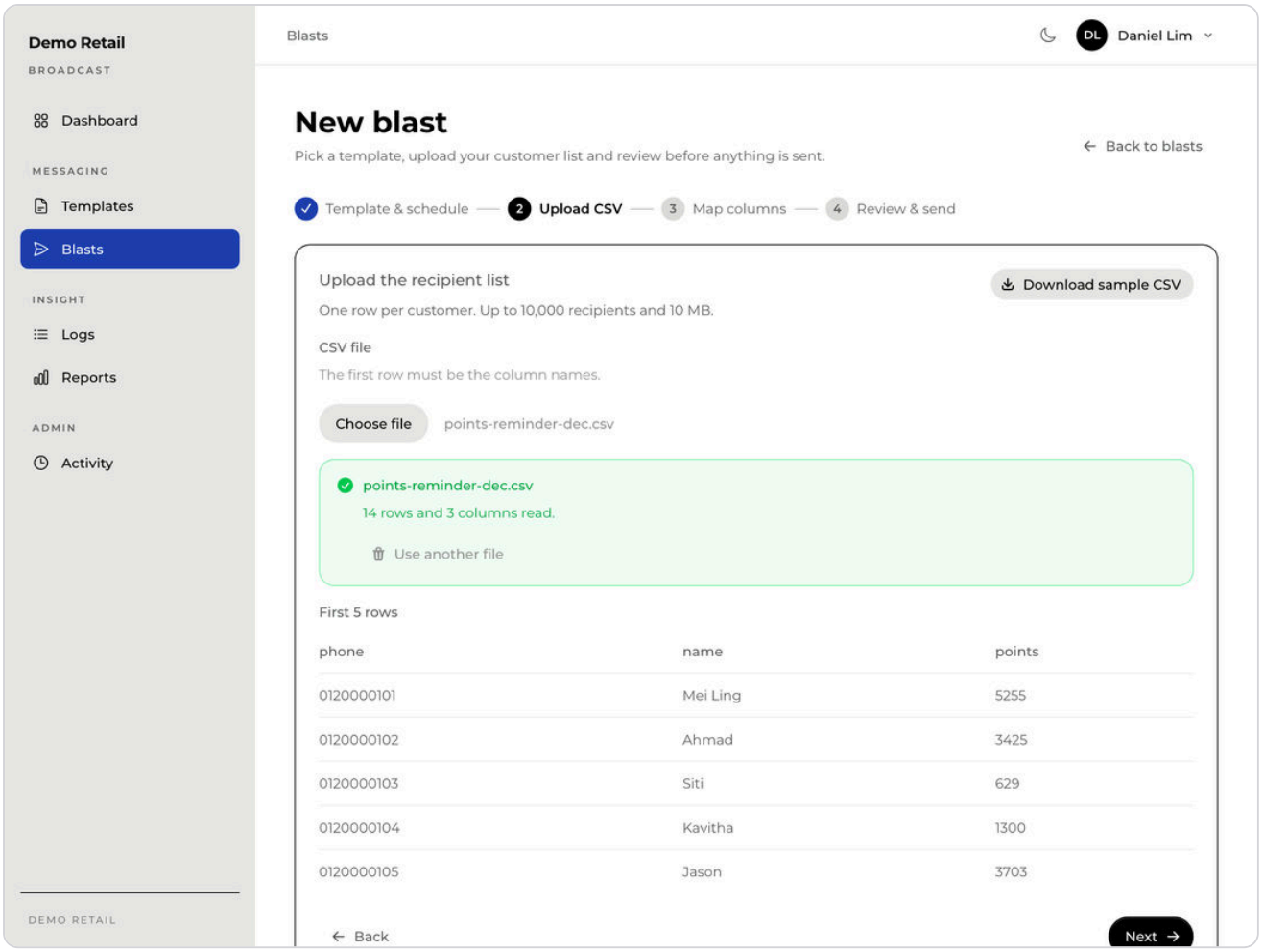
1. Template & schedule

1. Open **Blasts** and press **New blast**.
2. Pick the **Template**. Only approved templates are listed. The **Preview** shows the message.
3. Under **When should it go out?**, choose **Send as soon as I confirm**, or **Schedule for later** and pick the **Date** and **Time**.
4. Press **Next**.



2. Upload CSV

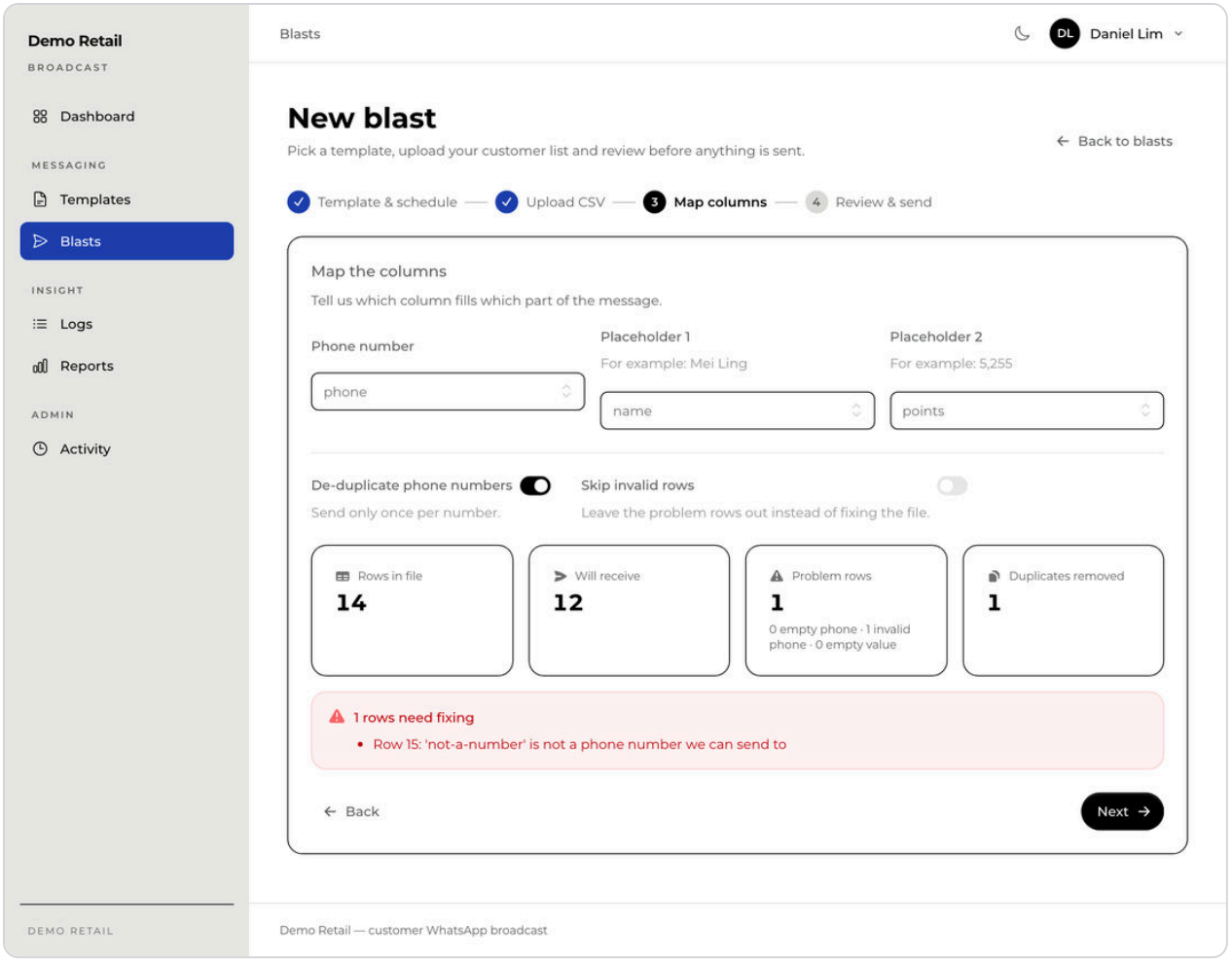
Press **Choose file** and pick your CSV. Broadcast reads it and shows the first 5 rows. Check they look right, then press **Next**. To pick a different file, press **Use another file**.



3. Map columns

Tell Broadcast which column holds the **Phone number** and which column fills each blank (**Placeholder 1**, **Placeholder 2**). The boxes show how many rows were found, how many customers **Will receive** the message, and any **Problem rows**.

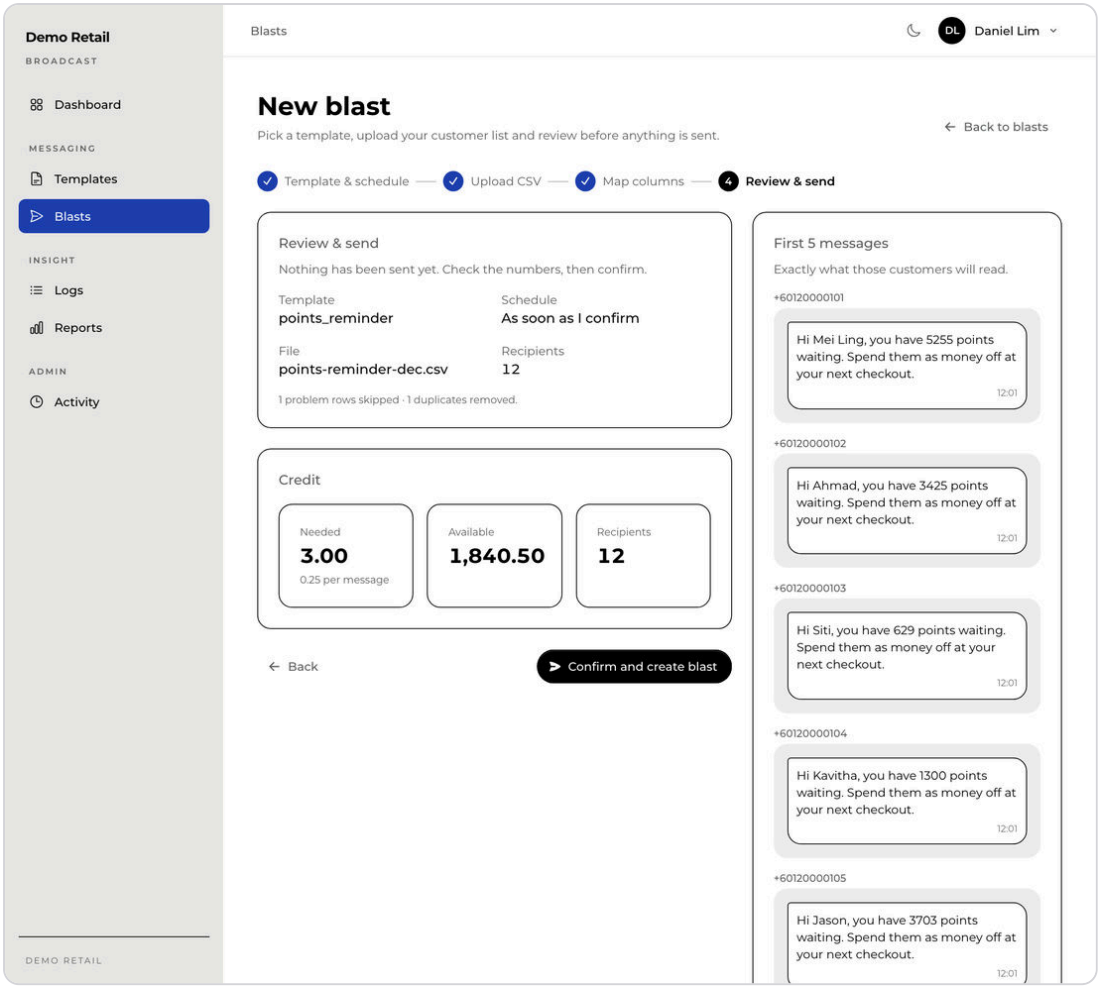
- **De-duplicate phone numbers** sends only one message per number. Leave it on.
- If some rows have a problem (for example a phone number that is not a number), either fix the file and upload it again, or switch on **Skip invalid rows** to leave them out.



4. Review & send

Nothing has been sent yet. Check the template, the schedule, the number of customers, and the **Credit** the blast **Needed** against what is **Available**. On the right, **First 5 messages** shows exactly what those customers will read.

When it is right, press **Confirm and create blast**.



If the credit is not enough for the whole list, the screen says **Not enough credit for the whole list**: messages stop once the balance runs out. Top up first, or send to a shorter list.

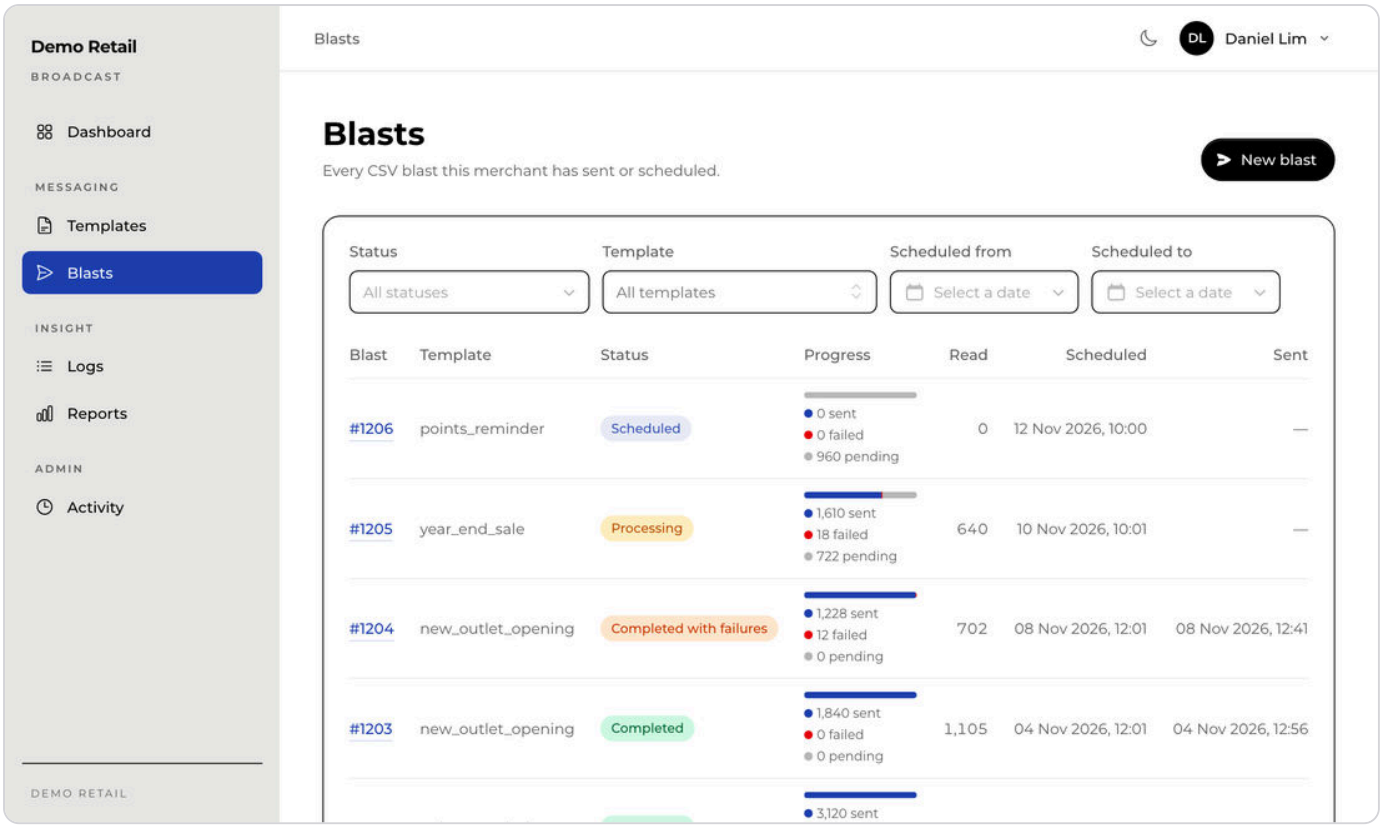
After you confirm, the page says **This list has already been sent**. Press **Open blast #…** to follow it. Do not confirm again.

BROADCASTING SERVER

Follow a blast and resend failures

For: Managers and viewers

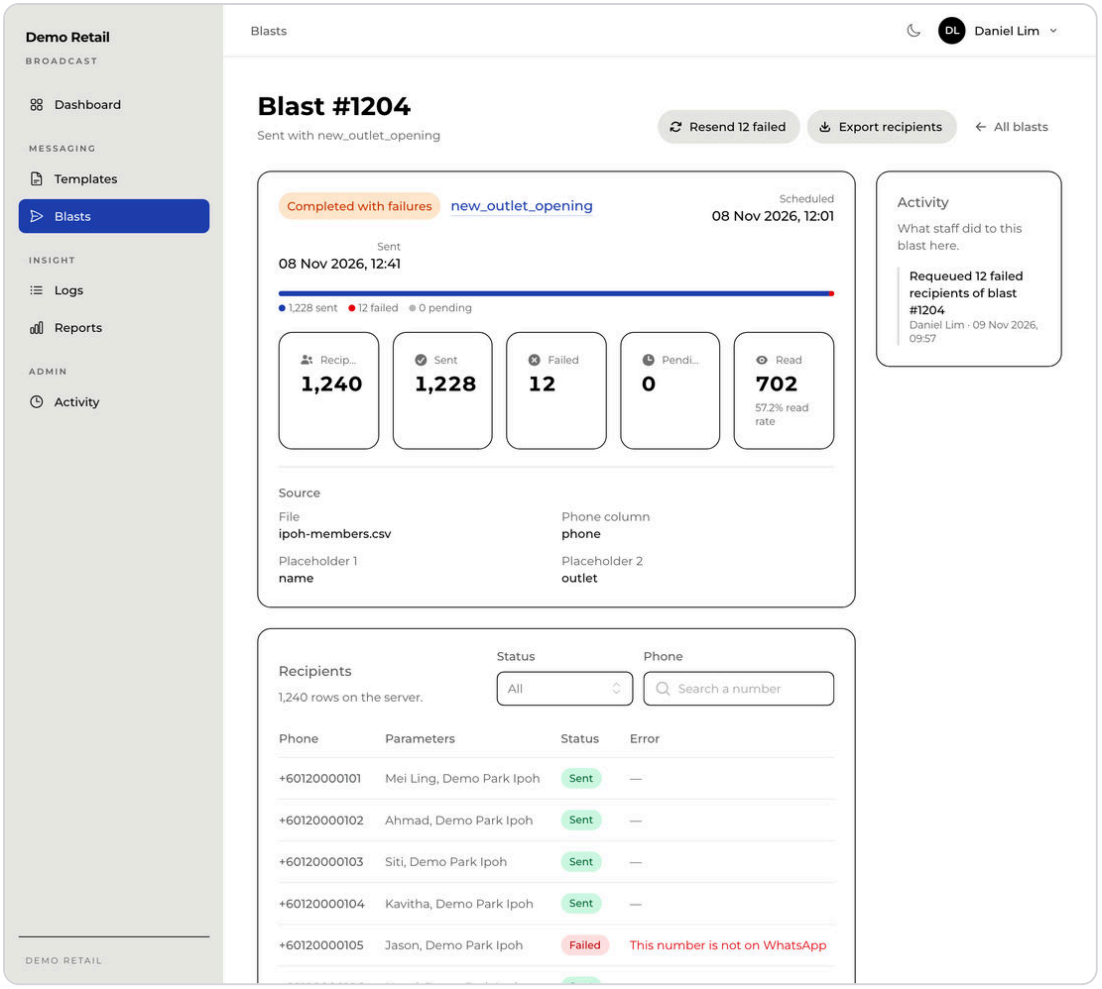
Open **Blasts** to see every blast, newest first, with how many messages were sent, failed and are still pending.



The **Status** of a blast:

Status	Meaning
Scheduled	Waiting for its time. It can still be cancelled.
Processing	Sending now. The page updates by itself every few seconds.
Completed	Every message went out.
Completed with failures	Finished, but some messages could not be delivered.
Cancelled	Stopped before it started.

Press a blast's number to open it.



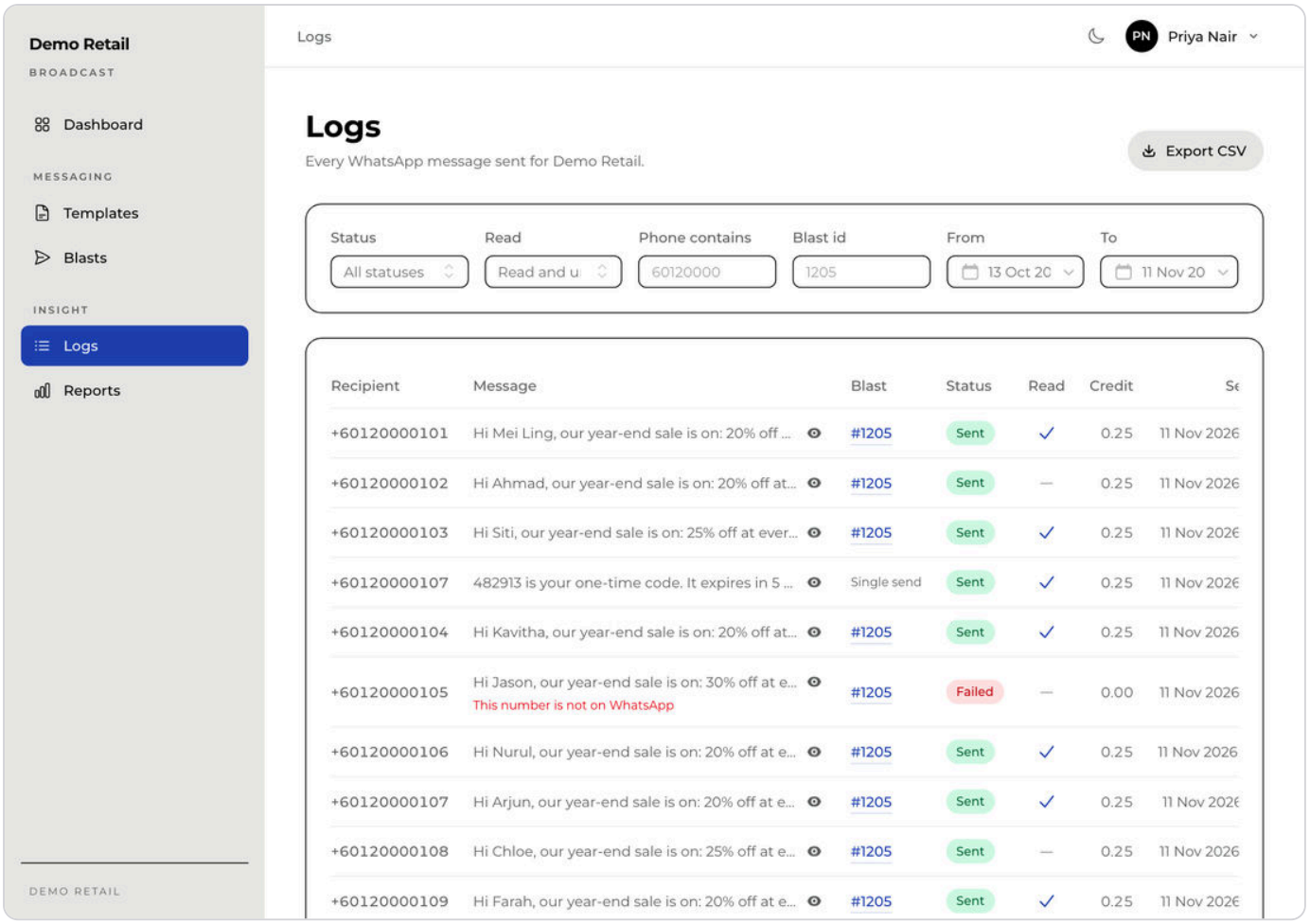
- The **Recipients** list shows each phone number, the values that filled the blanks, and the **Error** for any that failed, such as a number that is not on WhatsApp. Pick **Failed** under **Status** to see only those.
- **Resend … failed** tries the failed messages again. It is shown when some messages failed and the blast is not sending at that moment. It helps when the reason was temporary; a number that is not on WhatsApp will fail again.
- **Export recipients** downloads the list as a CSV file.
- **Cancel blast** is shown only while the blast is **Scheduled**. Press it and confirm; press **Keep it scheduled** to change your mind. A blast that has started cannot be stopped.
- **Activity** on the right shows what staff did to this blast.

Only managers and super admins see the resend and cancel buttons.

Check one customer's messages

For: Managers and viewers

Logs lists every WhatsApp message sent for your company: blast messages, and single messages from other modules such as one-time codes (shown as **Single send**).



To answer "Did this customer get our message?":

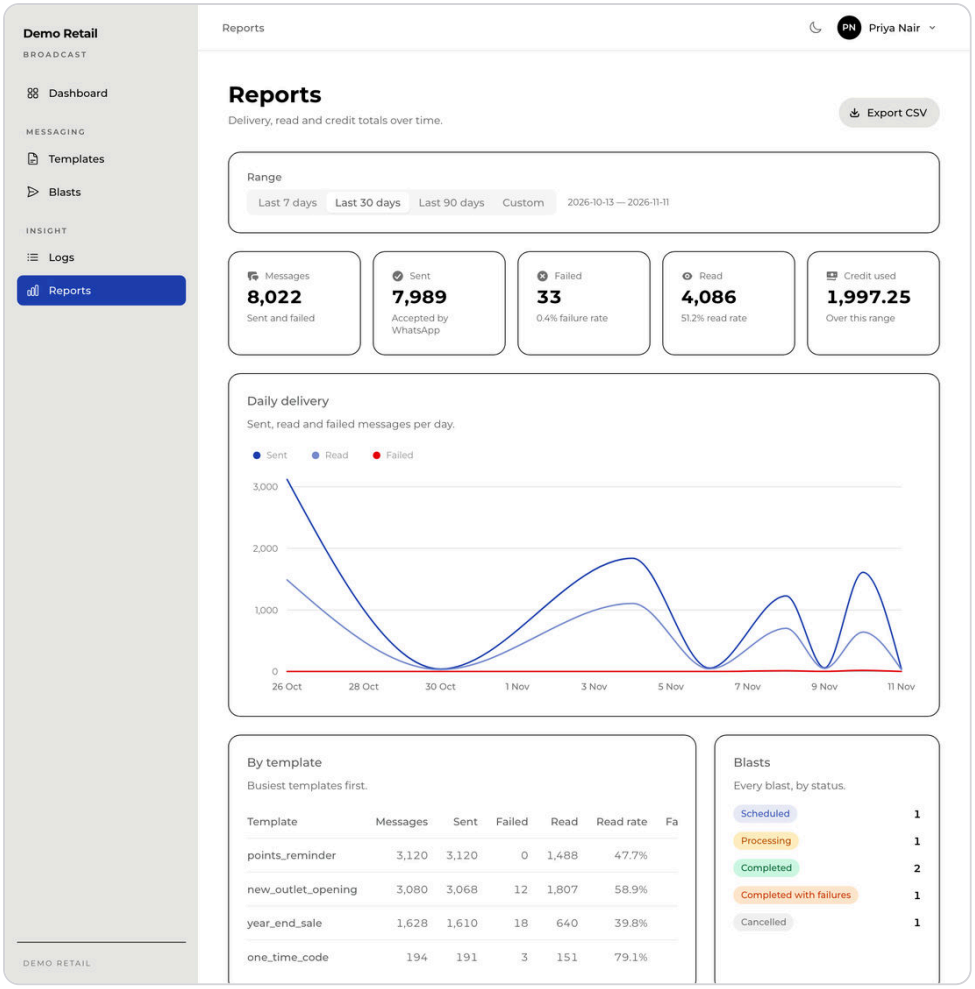
1. Open **Logs**.
2. Type part of their number in **Phone contains**. Set **From** and **To** if you know roughly when.
3. Read the row: **Sent** with a tick under **Read** means they opened it. **Failed** shows the reason in red under the message.
4. Press the eye icon next to a message to see it exactly as the customer saw it.

Other filters: **Status**, **Read**, and **Blast id** (the blast number). **Clear filters** resets them. **Export CSV** downloads what the filters show.

See how messages performed

For: Managers and viewers

Open **Reports**. Pick a **Range**: **Last 7 days**, **Last 30 days**, **Last 90 days** or **Custom**.



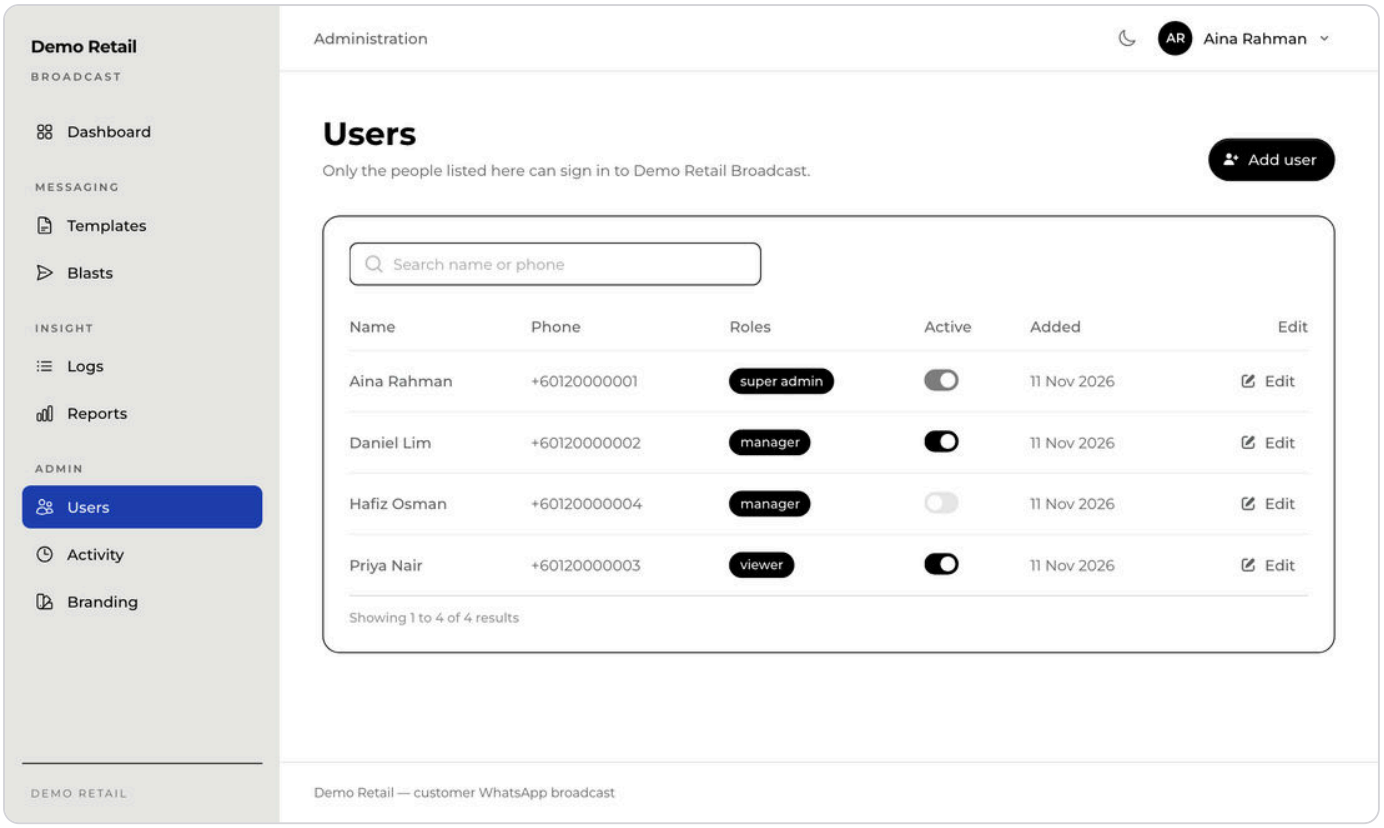
- The boxes at the top give the totals for the range. **Read** shows the read rate: of the messages delivered, how many were opened. **Credit used** is what the range cost.
- **Daily delivery** charts sent, read and failed messages per day.
- **By template** shows which messages were sent most and how well each was read. A low read rate can mean the message is not interesting enough, or is sent at the wrong time.
- **Blasts** counts every blast by status.

Export CSV downloads the figures.

Add and remove people

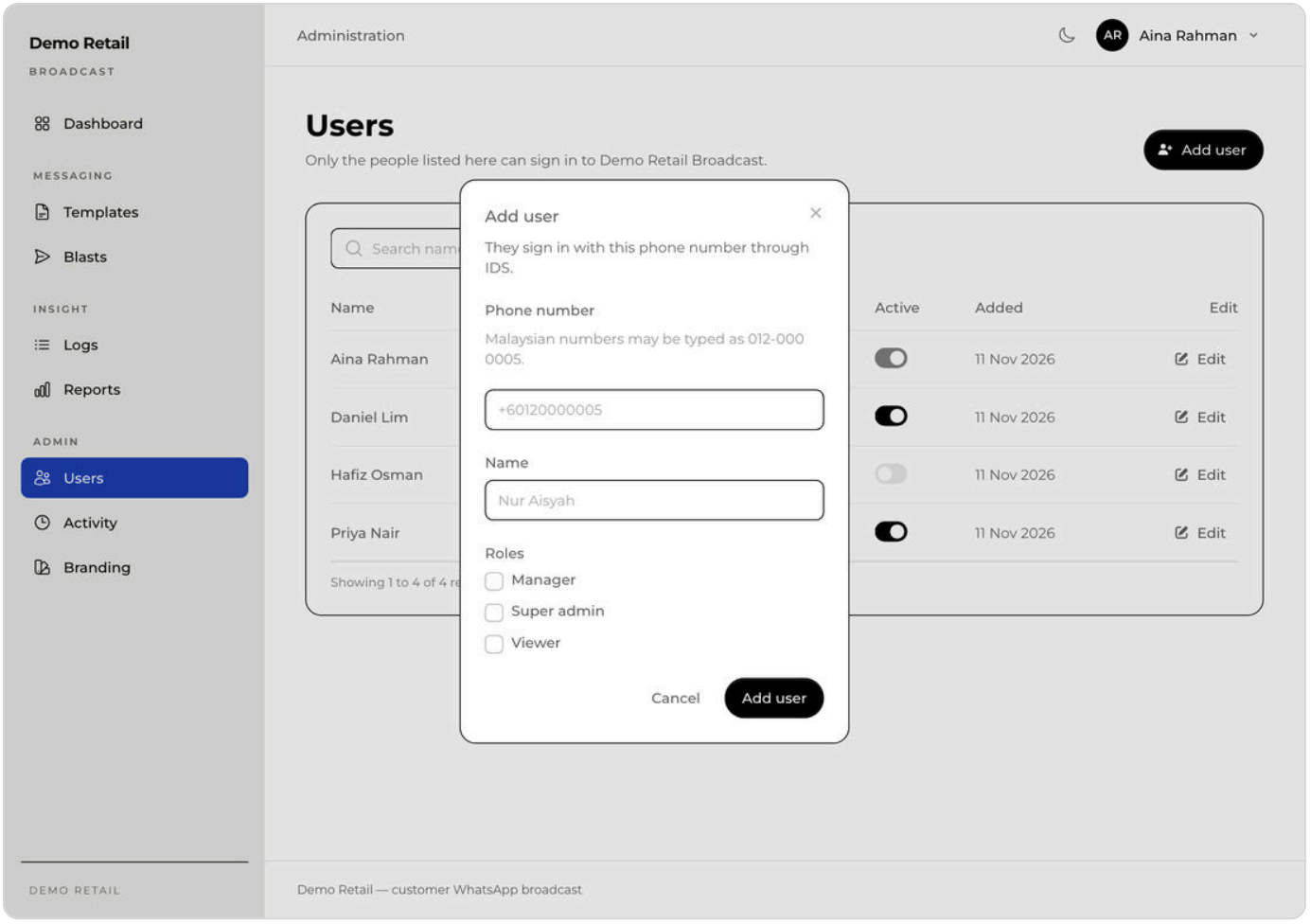
For: Administrators

Only people listed under **Users** can sign in to Broadcast. This page is for super admins.



Add someone

1. Press **Add user**.
2. Type their **Phone number** (the one they sign in with) and **Name**.
3. Tick their **Roles**: **Viewer** to look only, **Manager** to send, **Super admin** for everything.
4. Press **Add user**.



Change or stop someone

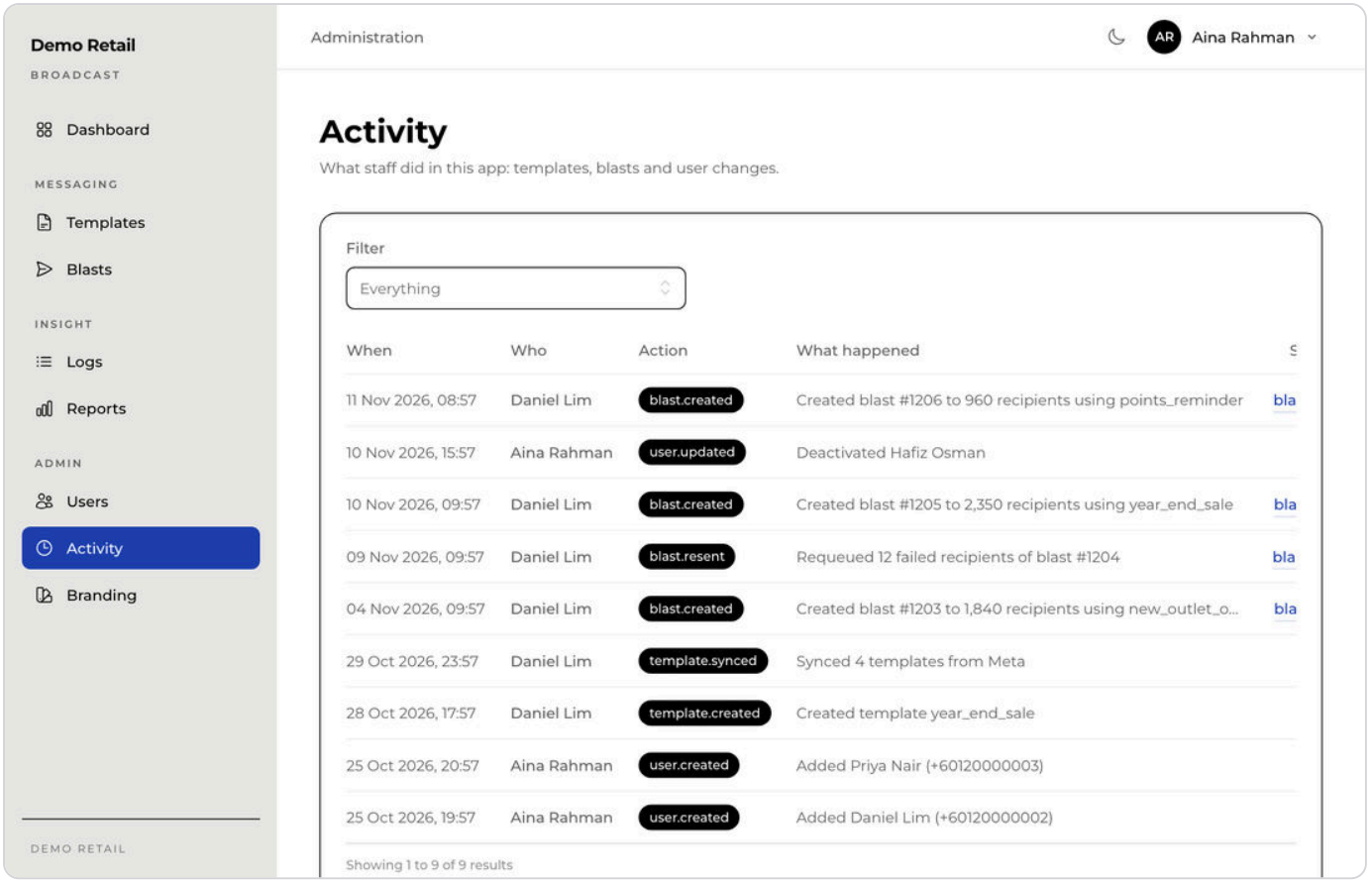
- Press **Edit** to change a person's name or roles, then **Save changes**. The phone number cannot be changed here.
- Switch **Active** off to stop someone signing in, for example when they leave. Switch it on again to let them back.

See who did what, and set the branding

For: Administrators

Activity

Activity lists what staff did in Broadcast: templates written, synced or deleted, blasts created, cancelled or resent, and people added or changed, with who did it and when. Use **Filter** to see one kind only. Managers can see this page too.

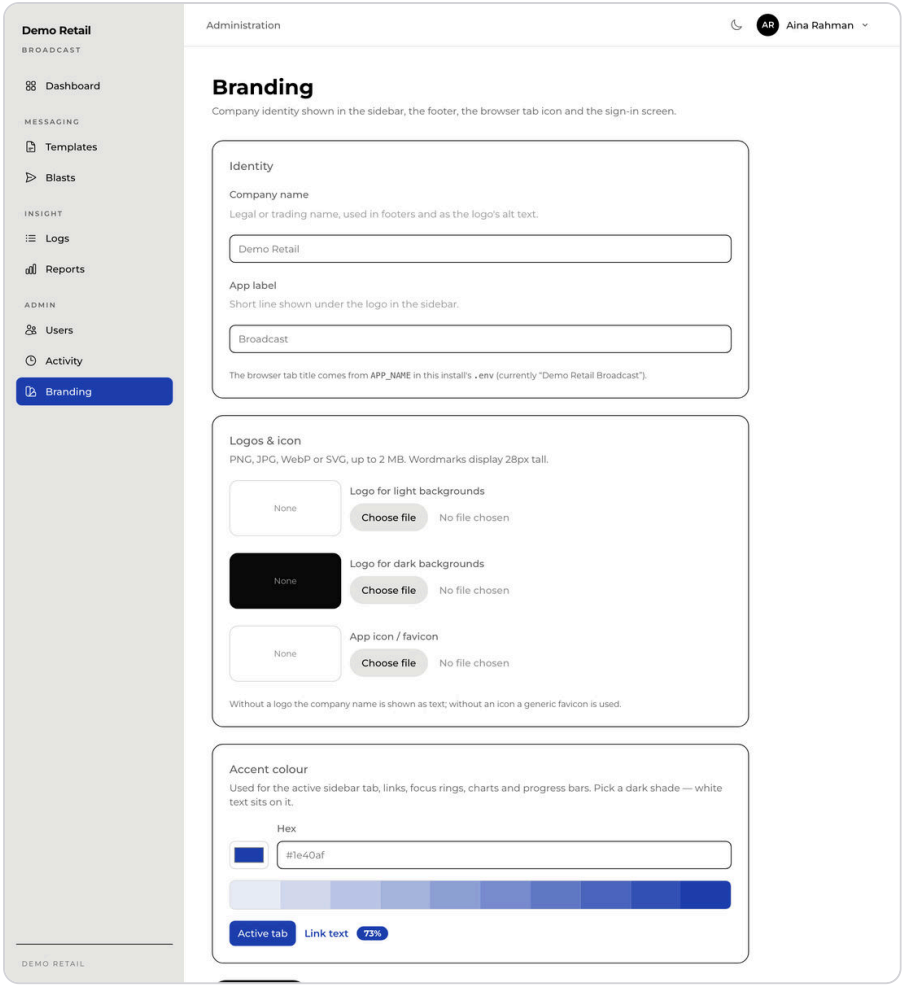


Branding

Branding sets how Broadcast looks for your company. Only super admins see it.

- **Company name**: shown in the footer, and in the sidebar when there is no logo.
- **App label**: the short line under the logo in the sidebar.
- **Logo for light backgrounds**, **Logo for dark backgrounds** and **App icon / favicon** (the small picture in the browser tab): PNG, JPG, WebP or SVG, up to 2 MB.
- **Accent colour**: the colour of the selected menu item, links and charts. Pick a dark shade, because white text sits on it.

Press **Save branding** at the bottom.



USER GUIDE · VERSION 1

Master data

The one list of staff and outlets that every other module reads, so a person or outlet is typed in once and appears everywhere.

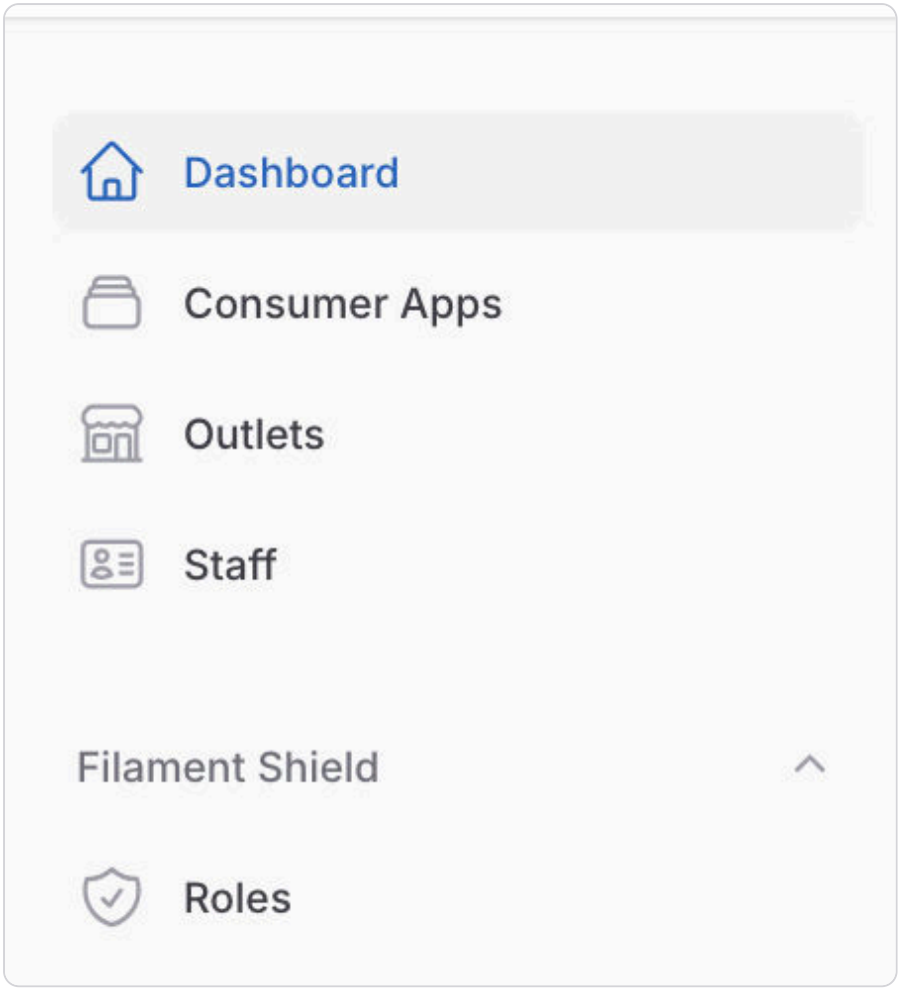
1. What it is for
2. Find a staff member
3. Add or change a staff member
4. Add or change an outlet
5. Connect another module
6. Who can do what

MASTER DATA

What it is for

For: Everyone

Master data keeps your company's staff list and outlet list in one place. The other modules, such as the staff portal, the payment system and inventory, copy these lists from here on a timer that each module sets (inventory, for example, every five minutes). When someone joins, moves outlet or leaves, you change it here once, and every module picks up the change on its next copy.



Who uses it

- **hr**: the human resources team. They add and change **Staff** and **Outlets**.
- **super_admin**: the administrator. Everything **hr** can do, plus **Consumer Apps** (which modules may read the lists) and **Roles**.

These are the role names as they appear on the **Roles** screen.

What it needs

- Staff sign in with the company's shared sign-in, or from the staff portal.
- Nothing else. Master data does not read from any other module; the other modules read from it.

What is not on screen

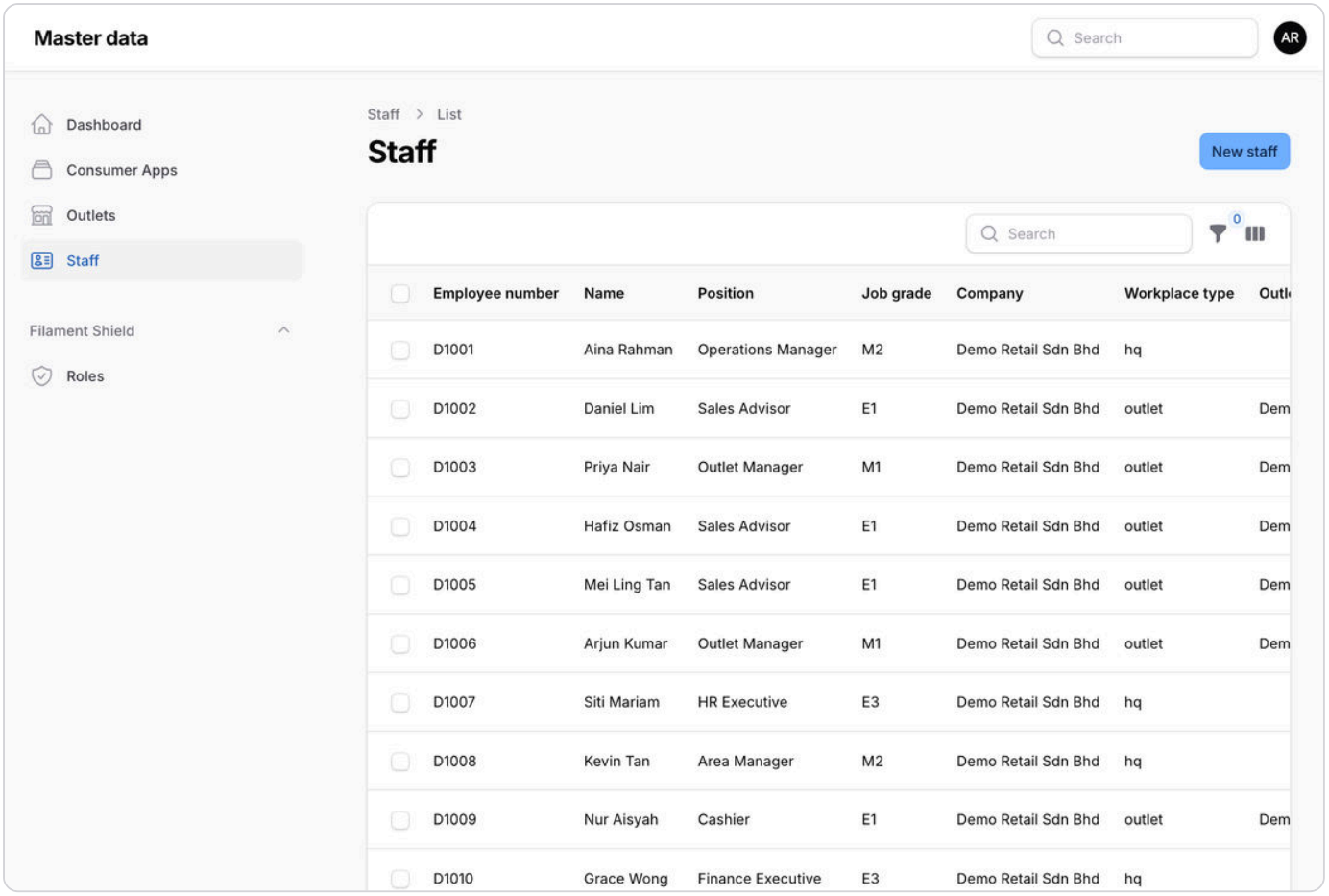
- Giving a person a role is done by your system supplier. There is no screen for it yet.
- Loading a whole staff list from a file is also done by your system supplier.

MASTER DATA

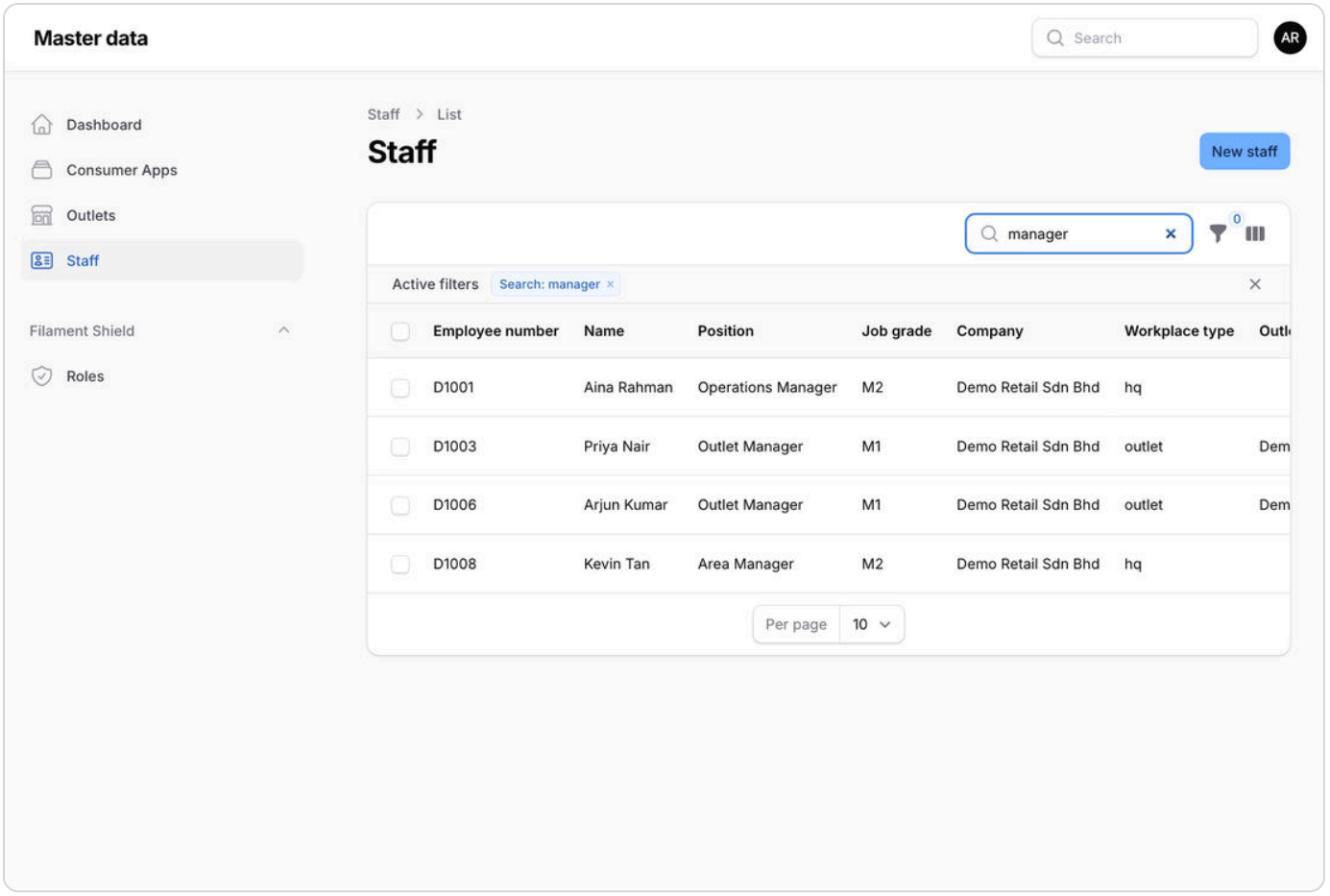
Find a staff member

For: HR

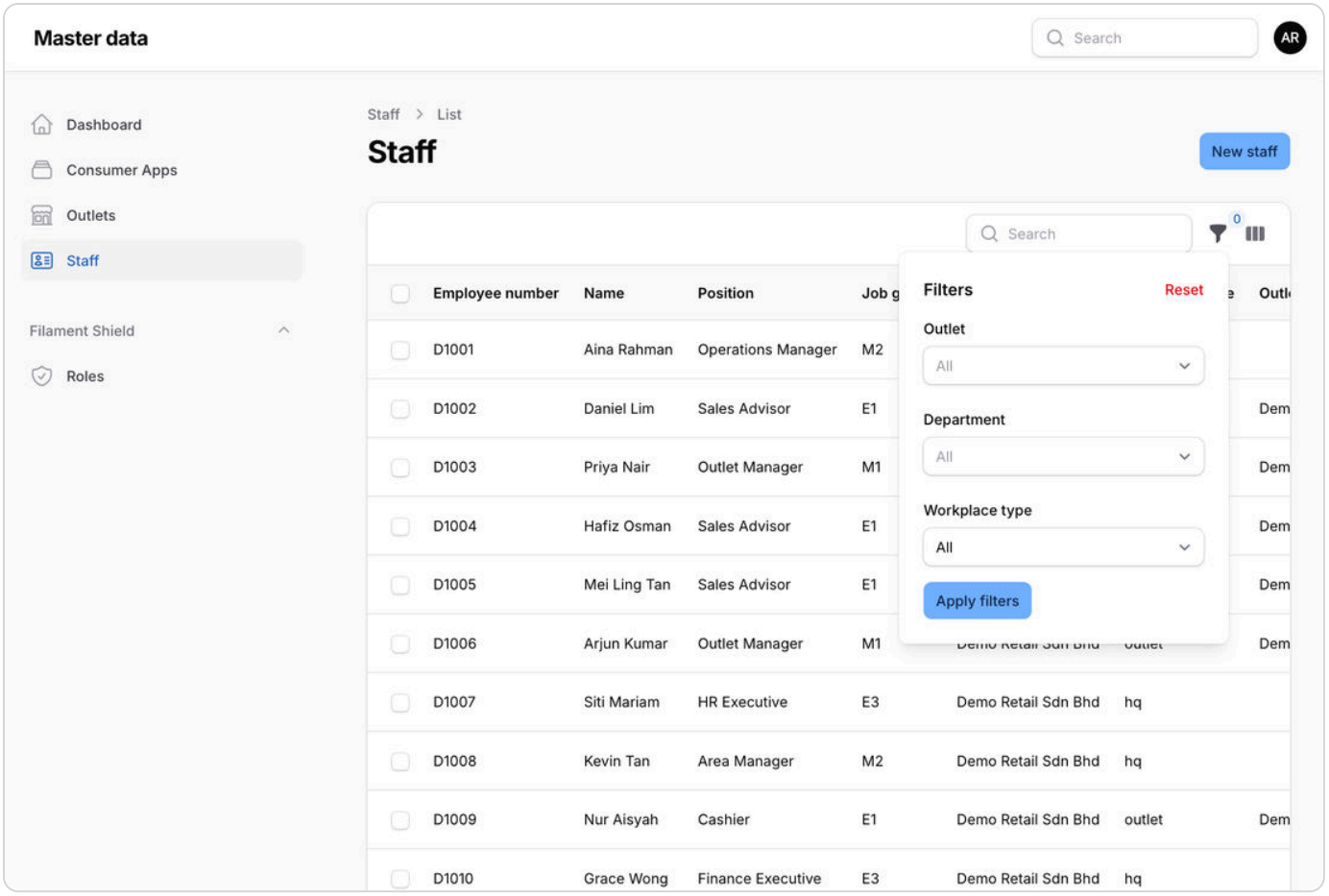
1. Open **Staff** in the menu on the left.



2. Type in **Search** above the table. It looks in the employee number, name, position, job grade, company, workplace type, outlet, department and phone number.



3. To narrow the list, press the funnel button next to **Search**. Pick an **Outlet**, a **Department** or a **Workplace type**, then press **Apply filters**. **Reset** clears them.



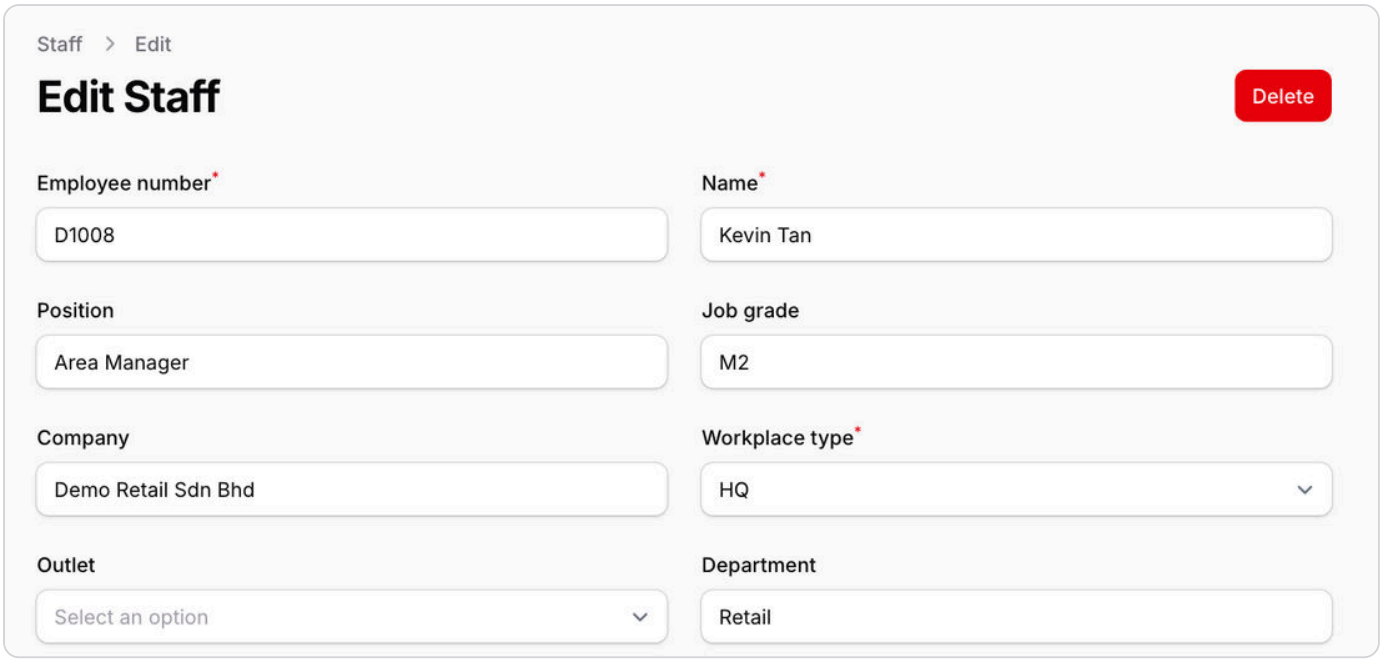
The list is wider than most screens. Scroll the table sideways to see **Outlet**, **Department**, **Phone no** and **Is active**. The button with three bars, next to the funnel, chooses which columns to show.

MASTER DATA

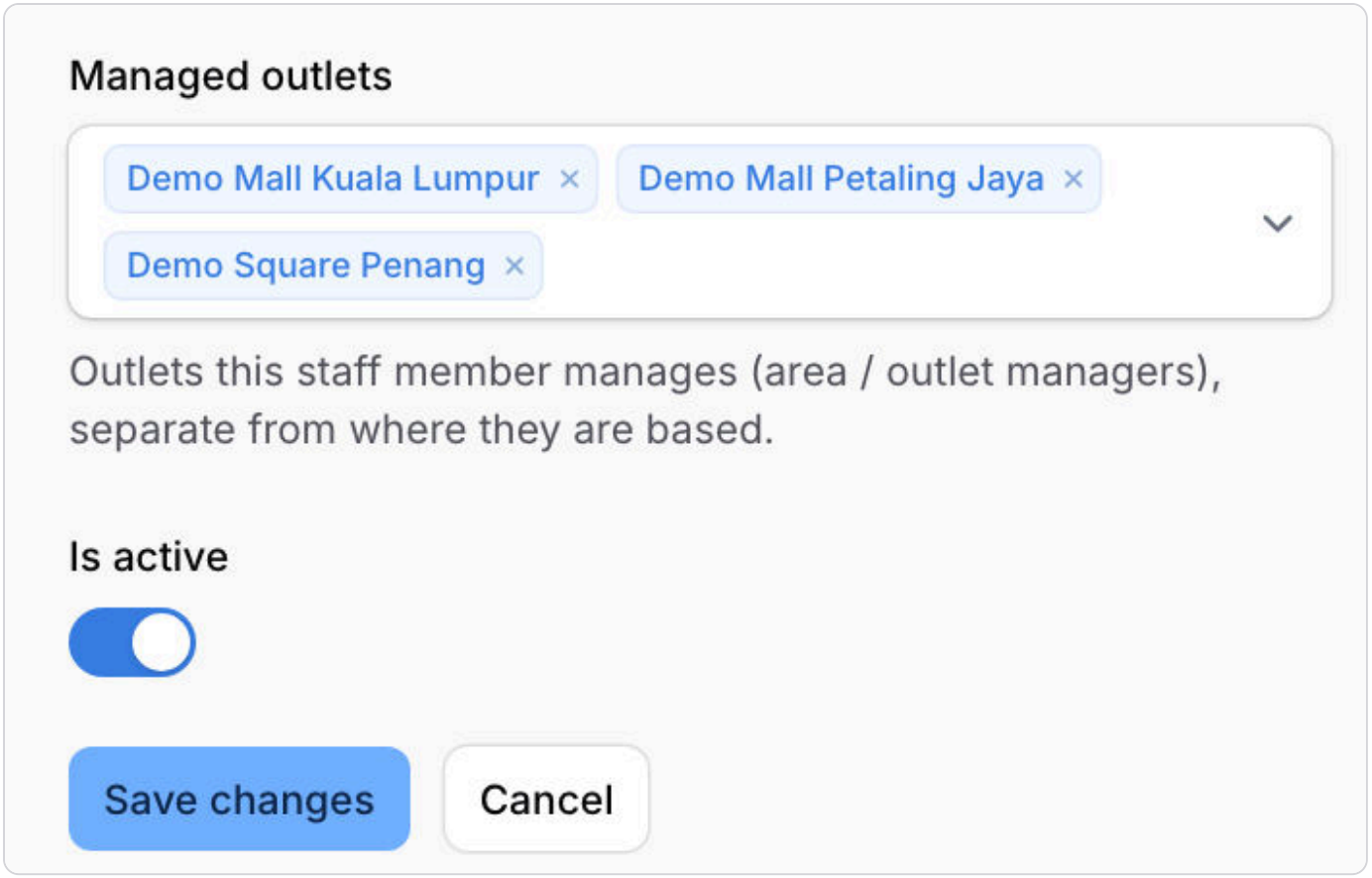
Add or change a staff member

For: HR

1. Open **Staff** in the menu.
2. Press **New staff** at the top right, or **Edit** at the end of a person's row.
3. Fill in the details. **Employee number**, **Name** and **Workplace type** must be filled in.
    - **Workplace type**: **Outlet** for someone based in a shop, **HQ** for head office.
    - **Outlet**: where the person is based. Leave it empty for head office staff.



4. **Managed outlets**: for an outlet manager or area manager, pick every outlet they look after. This is separate from where they are based. Other modules use it to know which outlets a manager looks after.
5. **Phone no**: the mobile number the person signs in with, written in full with the country code, for example +60123456789. This is how the other modules match a signed-in person to their staff record. If it is wrong or missing, the person signs in but the modules do not know who they are.
6. Press **Create** (new person) or **Save changes**.



When someone leaves

Switch off **Is active** and save. Avoid **Delete**: it removes the person for good, and a module that already copied them can keep its old copy until its next full refresh. Switching off keeps the record that they worked here, and the other modules see them as inactive.

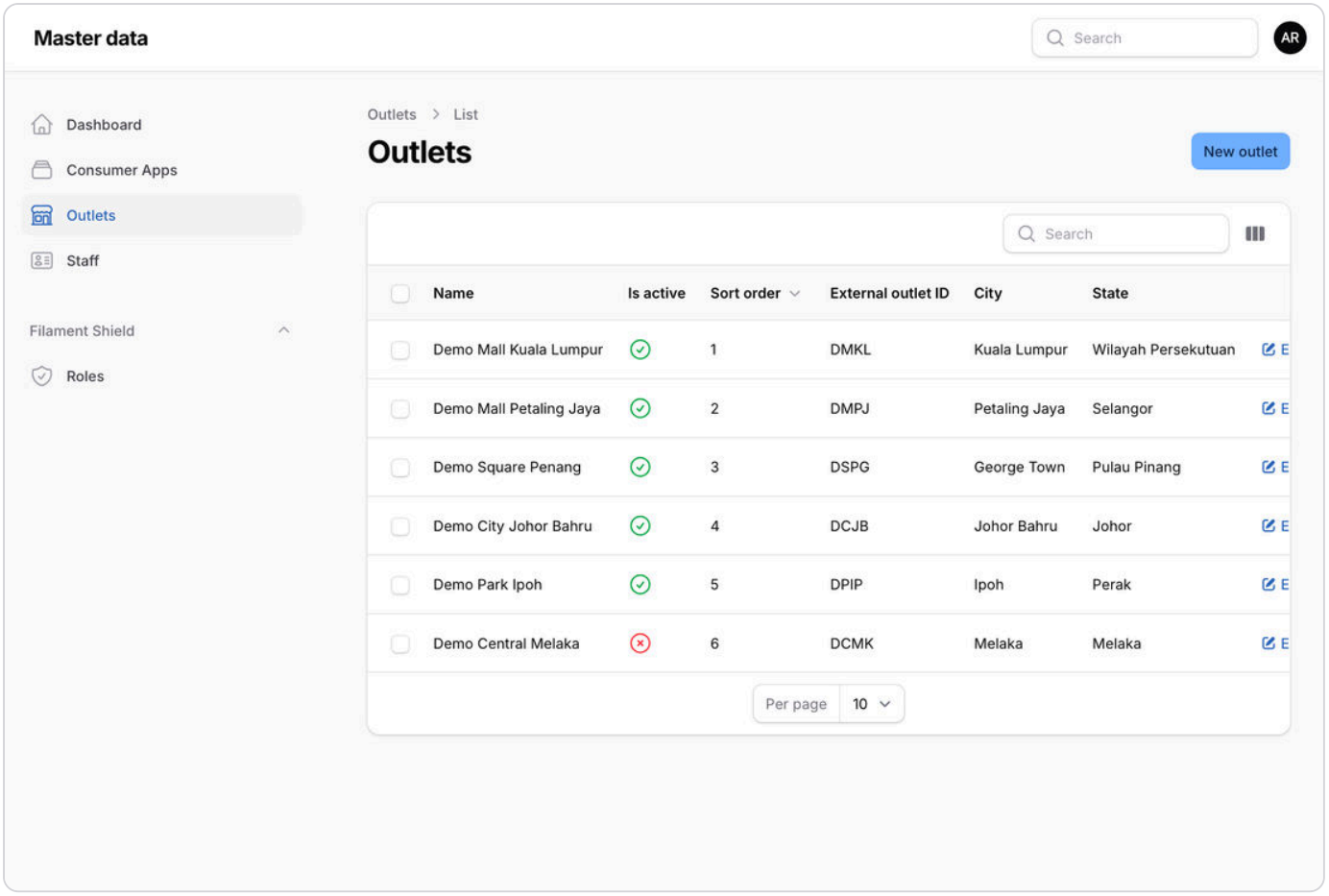
Changes reach the other modules on their next copy. A module may show the old details until then.

MASTER DATA

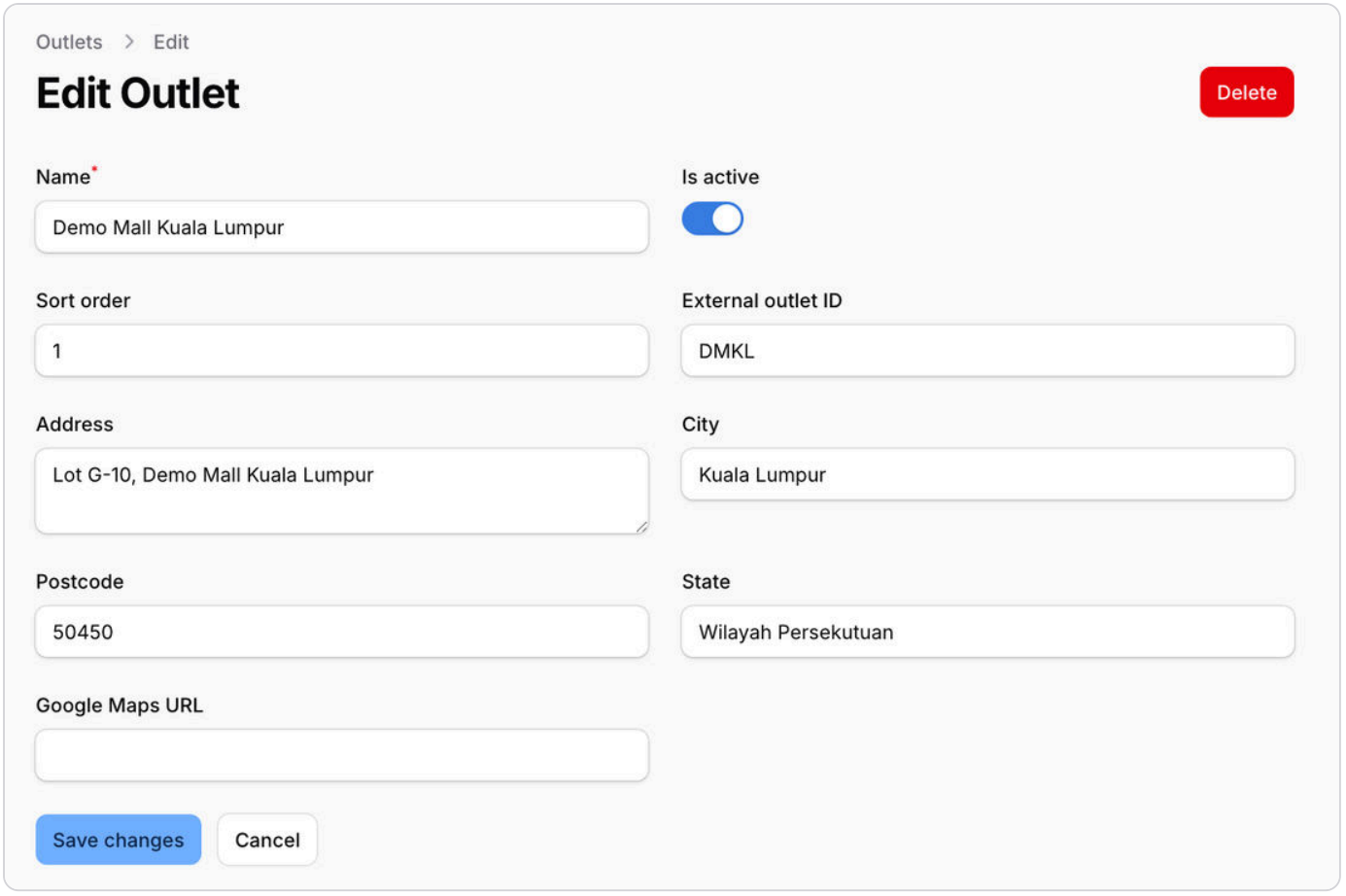
Add or change an outlet

For: HR

1. Open **Outlets** in the menu on the left.



2. Press **New outlet**, or **Edit** at the end of an outlet's row.
3. Type the **Name**. This is the name every module shows.
4. **Sort order** decides where the outlet appears in lists in the other modules. Lower numbers come first.
5. **External outlet ID** is the outlet's code in your till system. Fill it in when the outlet has one, so the till, inventory and payment records line up.
6. Add the **Address**, **City**, **Postcode** and **State**. **Google Maps URL** is optional: paste the link from Google Maps' Share button.
7. Press **Create** or **Save changes**.



When an outlet closes

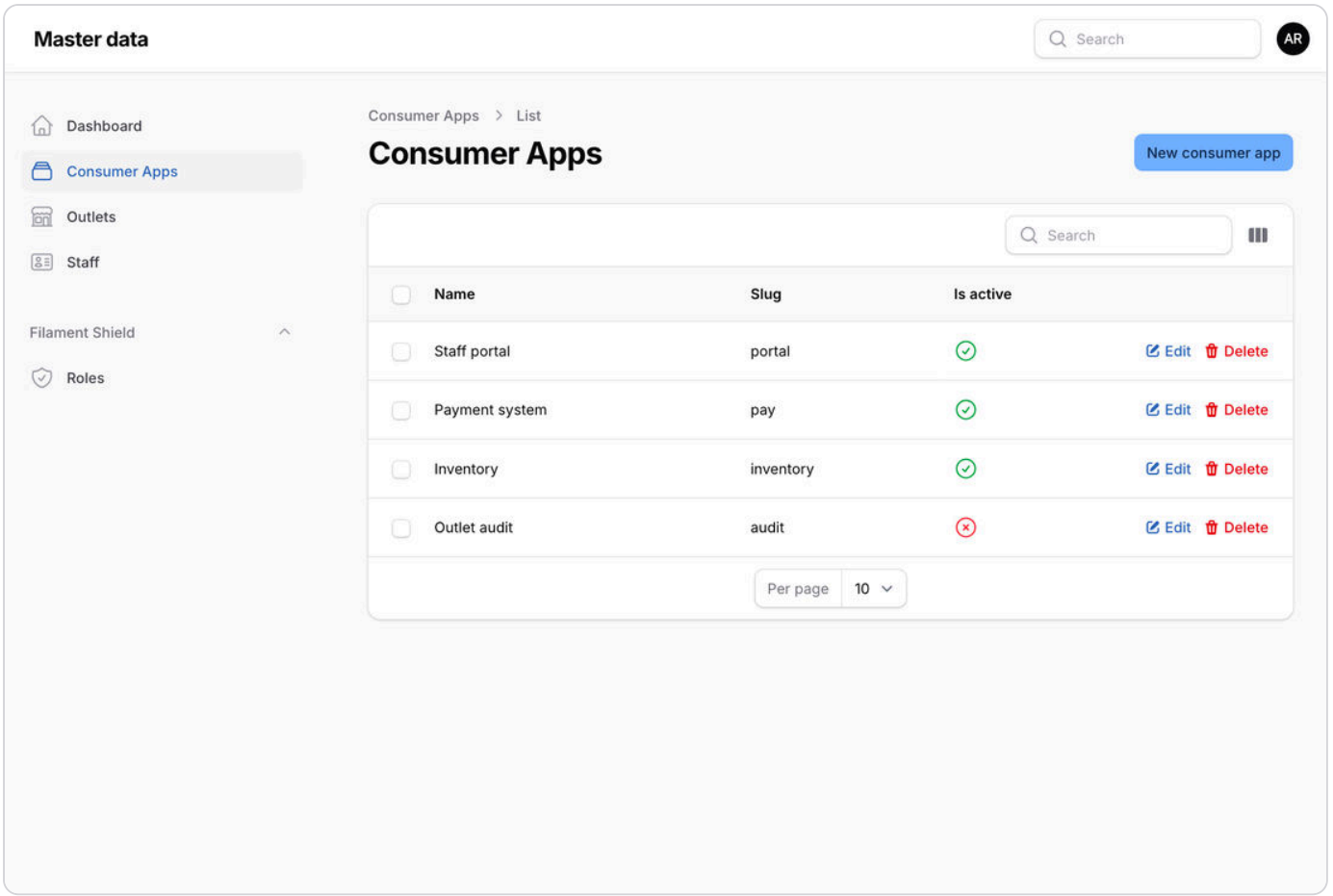
Switch off **Is active** and save, rather than deleting it. Staff and old records in other modules still point at it.

Connect another module

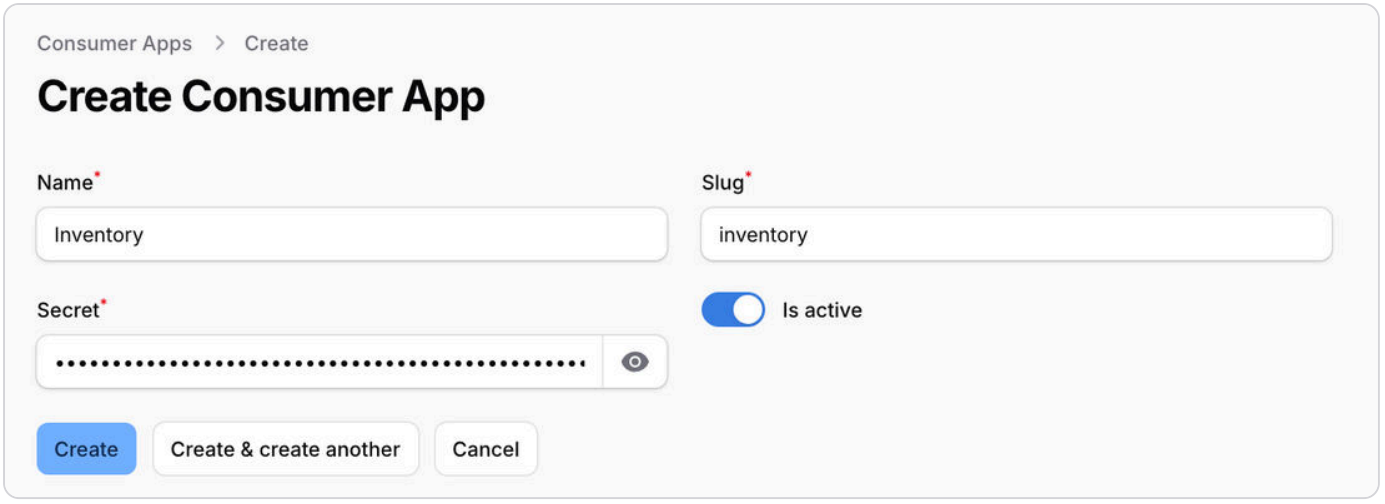
For: Administrators

A module can only read the staff and outlet lists if it is listed under **Consumer Apps**. Each one has its own short name and secret, a password the module uses to prove who it is.

1. Open **Consumer Apps** in the menu on the left.



2. Press **New consumer app**.
3. Type the **Name**, for example Inventory. The **Slug**, the module's short name, fills in by itself. Change it only if the person setting up the module asks for a different one.
4. A **Secret** is made for you. Press the eye button to show it, and copy it.
5. Leave **Is active** switched on, and press **Create**.



Give the slug and the secret to the person setting up that module. They enter both in the module's own settings.

Stop a module reading the lists

- Switch off **Is active** to pause it. Switch it back on to resume.
- **Delete** stops it at once: its slug and secret stop working straight away. It cannot be undone.

MASTER DATA

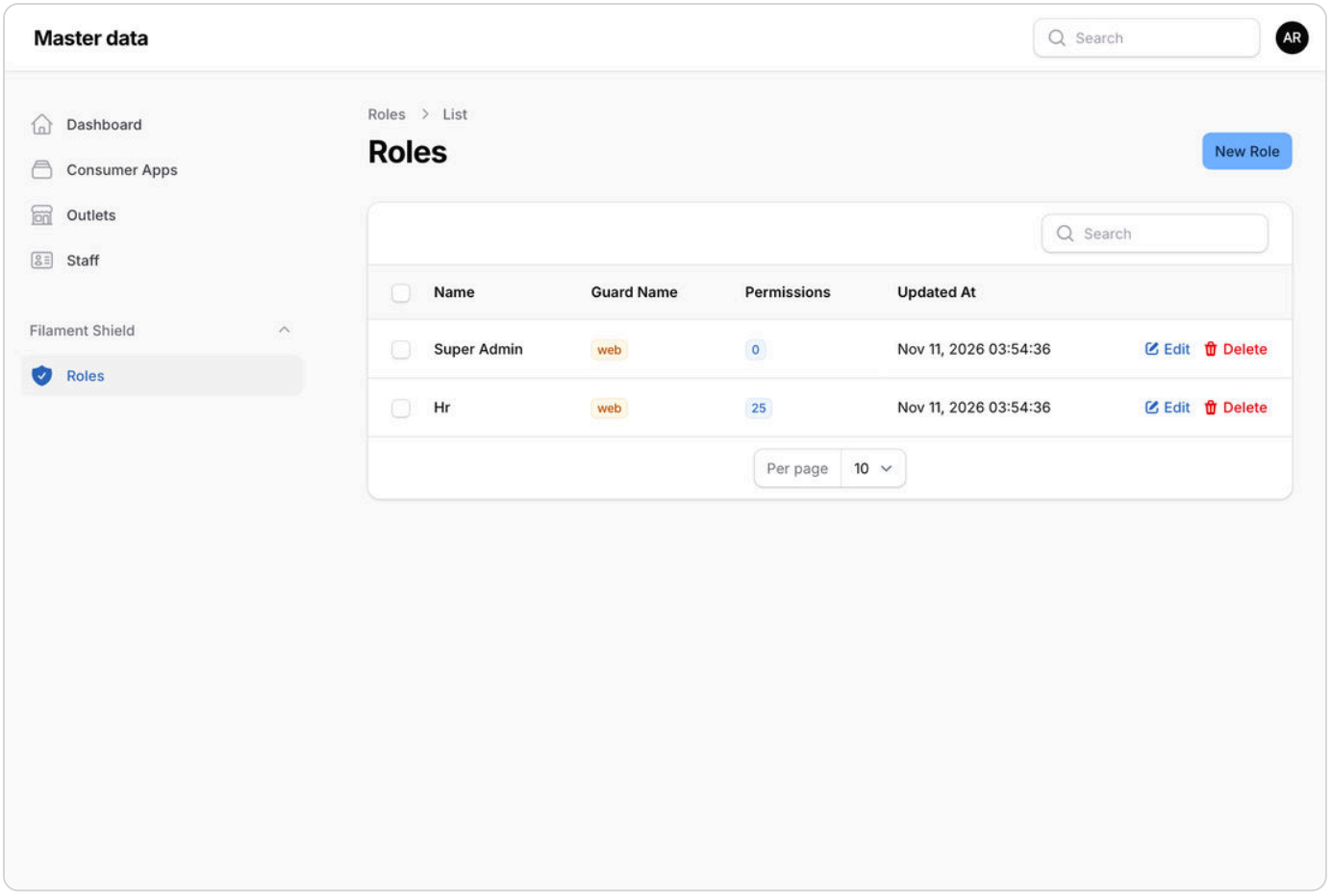
Who can do what

For: Administrators

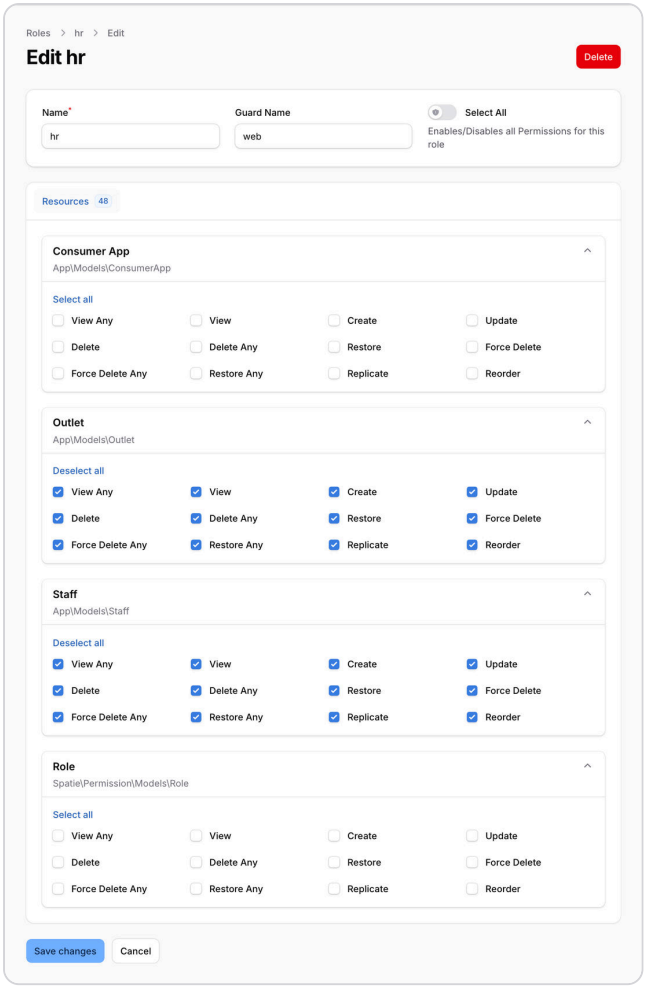
A role is a set of permissions. Two roles exist at the start:

- **super_admin** can do everything.
- **hr** can see, add, change and delete **Staff** and **Outlets**, and nothing under **Consumer Apps**.

1. Open **Roles** under **Filament Shield** in the menu.



2. Press **Edit** next to a role.
3. Each screen has its own group of tick boxes. **View Any** lets the person open the list, **View** opens one record, **Create** adds, **Update** changes and **Delete** removes. **Select all** ticks a whole group.
4. Press **Save changes**.



Not on this screen yet

- A role made here cannot open Master data at all: the permission to enter has no tick box. Use **hr** or **super_admin**, or ask your system supplier to add a new role properly.
- Giving a role to a person is done by your system supplier.
- Today the **hr** role can also open **Roles** and change them, although its **Role** boxes are not ticked. Keep this in mind until it is fixed.

USER GUIDE · VERSION 1

App API server

The server behind the mobile app. It holds app accounts, the app's wallet and payments, and passes requests between the app and the other modules. Staff do not use it directly.

1. What it is for
2. The admin panel

APP API SERVER

What it is for

For: Everyone

The App API server is the part of the system the mobile app (SuperApp) talks to. Nobody opens it on a screen in their daily work. When a customer or a staff member uses the app, the app asks this server, and the server answers or passes the request on to the right module.

What it does for the business

- **App accounts**: signing up and signing in to the app, changing phone number or email, profile photo and PIN.
- **Wallet and payments**: the app's e-wallet, top-ups, vouchers and payments, and the messages from the bank or payment provider saying a payment went through.
- **Membership in the app**: the member card and points, taken from Membership and Loyalty.
- **Shopping in the app**: orders from the online shop.
- **Staff in the app**: the staff incentive figures, the staff directory and outlets, and the staff tools listed in the app menu.
- **Approvals on the phone (eSecure)**: when a cashier asks a member to approve spending points, this server puts the request on the member's phone (in the app, and by WhatsApp) and tells the till the answer.
- **Feedback, ratings, live streams and the app's help menu.**

Who looks after it

Your technical team. Call them when the app will not sign in, a top-up or payment does not show, or eSecure approvals do not arrive. When this server is down, the mobile app stops working, and cashiers should use the one-time code instead of eSecure.

APP API SERVER

The admin panel

For: Administrators

The App API server has a small admin panel at **/admin** on its own web address, for the people who set up the mobile app. Its menu, as it appears today:

Menu	What it is for
User Management	App accounts: find a person, see and change their details.
Roles	Who may use which part of this admin panel.
Manage Services	The service icons shown in the app.
Manage Staff Module	The staff tools listed in the app, and which staff see each one.
Manage Help Menu	The entries in the app's help menu.
Manage Streams	Live and recorded videos shown in the app.
Manage Questions, **Manage Submissions**, **Manage Ratings**	The feedback questions the app asks, the answers people gave, and their ratings.
Manage Translation	The app's wording in each language.
Manage QR Redirection	Where a printed QR code sends people, so the code can stay the same when the page changes.
Manage Clients	The other modules allowed to talk to this server. Change only with your technical team.

There are no pictures on this page yet: this page was written from the server's code, not from the running panel.