

Additional Accountbook Creation

How To Clone an Existing Accountbook

This manual will going to teach you how to Clone an Accountbook.

1. Login in the Customer Subscription Portal using this provided link.

<https://member.uniq365.com/Membership/MemberShip/Login>

Encode the Email and Password Accordinlv.



Membership Sign in

[Forgot Password?](#)

Don't have an account? [Sign Up](#)

2. Navigate to CLONE DATA and fill up the required fields.

- Dashboard
- Renew Subscription
- Update Subscription
- Company List
- User List
- Storage Management
- Clone Data
- Invoice History
- Payment Receipt History
- Consolidation Template
- Change Admin Ownership

Clone Data

Clone Data

Source Account Book :

Destination Account Book :

Customer/Supplier | Product | Chart of Account | Warehouse | Others

Type Filter

Code
No data available in table

Select All
Select None
Clone

Fill up the following fields:

- Source Accountbook - Pertaining to the Accountbook that you want to copy for the master files.
- Destination Accountbook - Pertaining to the Accountbook destination for cloning purposes.
- Customer Supplier Configuration

Select the C
You can Sele

Welcome, Uniq365 Demo Account Book

Clone Data

Clone Data

Source Account Book :

Destination Account Book :

Customer/Supplier | Product | Chart of Account | Warehouse | Others

Type Filter

	Code	
<input type="checkbox"/>	CA00001	Andrew Zhang
<input type="checkbox"/>	CA00005	Angela Lee
<input type="checkbox"/>	CB00004	Benjamin Tan
<input type="checkbox"/>	CD00002	David Lim
<input type="checkbox"/>	CH00006	Henry Ng
<input type="checkbox"/>	CJ00003	Jessica Wong
<input type="checkbox"/>	CR00009	Rachel Teo
<input type="checkbox"/>	CS00008	Samuel Goh
<input type="checkbox"/>	CV00007	Vivian Chua
<input type="checkbox"/>	NONE	NONE
<input type="checkbox"/>	SB00001	Bruce Ching
<input type="checkbox"/>	SC00005	Charlene Foo
<input type="checkbox"/>	SC00006	Cesar Sy
<input type="checkbox"/>	SE00002	Eric Lau

Select All
Select None
Clone

- Product Configuration

Select Product that you want to add on the new Accountbook.

You can Select all or only select preferred Products.

- Chart of Accounts Configuration

Select specific COA that you want to add on the new Accountbook.

You can Select all or only select preferred COA.

Has the option to delete existing COA Accounts prior to cloning process.

- Warehouse Configuration

Select specific Warehouse that you want to add on the new Accountbook.

You can Select all or only select preferred Warehouse.

Clone Data

Source Account Book : Uniq365DemoAcco

Destination Account Book :

Customer/Supplier Product Chart of Account Warehouse Others

	Code	
<input type="checkbox"/>	TS	Transit Warehouse
<input type="checkbox"/>	JP	Jurong Point Warehouse
<input type="checkbox"/>	WH	Main Warehouse

Select All Select None Clone

- Others Configuration

Select specific Master tables to be carry forward on the new clone Accountbook.

Clone Data

Source Account Book : Uniq365DemoAcco

Destination Account Book :

Customer/Supplier Product Chart of Account Warehouse Others

<input checked="" type="checkbox"/> Final Accounts Layout	<input checked="" type="checkbox"/> Product Brand	<input checked="" type="checkbox"/> Credit Class
<input checked="" type="checkbox"/> Account Posting Settings	<input checked="" type="checkbox"/> Product Model	<input checked="" type="checkbox"/> Territory
<input checked="" type="checkbox"/> Customer Account Group	<input checked="" type="checkbox"/> Product Made	<input checked="" type="checkbox"/> Project
<input checked="" type="checkbox"/> Supplier Account Group	<input checked="" type="checkbox"/> Product Size	<input checked="" type="checkbox"/> Department
<input checked="" type="checkbox"/> Product Account Group	<input checked="" type="checkbox"/> Product Group	<input checked="" type="checkbox"/> Section
<input checked="" type="checkbox"/> Customer Product Account Group	<input checked="" type="checkbox"/> UOM	<input checked="" type="checkbox"/> Unit
<input checked="" type="checkbox"/> Supplier Product Account Group	<input checked="" type="checkbox"/> UOM Conversion	<input checked="" type="checkbox"/> Currency
<input checked="" type="checkbox"/> Document Number Scheme	<input checked="" type="checkbox"/> UOM Conversion (By Product)	<input checked="" type="checkbox"/> User Group
<input checked="" type="checkbox"/> Customer/Supplier Product Price & Subcode Table	<input checked="" type="checkbox"/> Delivery Term	<input checked="" type="checkbox"/> Menu Maintenance
<input checked="" type="checkbox"/> Customer Group	<input checked="" type="checkbox"/> Delivery Mode	<input checked="" type="checkbox"/> Report Maintenance
<input checked="" type="checkbox"/> Supplier Group	<input checked="" type="checkbox"/> Payment Term	
	<input checked="" type="checkbox"/> Payment Mode	

Select All Select None Clone

3. Once all are properly configured CLICK the CLONE Button to proceed with the process. Once done check the Company Listing if the new cloned Accountbook is created.



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Companies

+Add New Company

SrNo	Code	Name	Email
1	Uniq365DemoAcco	Uniq365 Demo Account Book	admindemo01@a2000.net

10 records

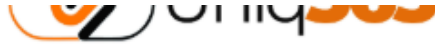
How to Add a New Accountbook in the Customer Subscription Portal

This manual will going to teach you how to create a new additional Accountbook in the Customer Portal.

1. Login in the Customer Subscription Portal using this provided link.

<https://member.uniq365.com/Membership/MemberShip/Login>

Encode the Email and Password Accordingly.



Membership Sign in

[Forgot Password?](#)

[Don't have an account? Sign Up](#)

2. Before Accountbook Creation, check first the Allowable Accountbook for Creation.

You can navigate in **UPDATE SUBSCRIPTION -> STEP 3 -> Look for the value STD-Standard Accounts Book DB (20GB)** and update accordingly.

You only have to configure this if you have no available balance for accountbook in the Customer Subscription Portal. Continue to STEP 4, STEP 5 and Payment to update successfully.

Update Subscription

STEP 1 | STEP 2 | **STEP 3** | STEP 4 | STEP 5 | PAYMENT

NUMBER OF ACCOUNT BOOKS	Data (Gb)	File (Gb)		BOOKS (Qty)	AMOUNT PER BOOK PER MTH
ADV-Advance Accounts Book DB (SKU/25 GB)	25	25	0	+	0 Book(s) \$ 0 (Up to current subscription)
ARC-Archived Accounts Book DB (FullLocked/5GB)	5	5	0	+	0 Book(s) \$ 0 (Up to current subscription)
ARC-Archived Accounts Book DB (FullLocked/50GB)	50	50	0	+	0 Book(s) \$ 0 (Up to current subscription)
ARC-Archived Accounts Book DB (FullLocked/100GB)	100	100	0	+	0 Book(s) \$ 0 (Up to current subscription)
BKP-Simple Accounts Book DB (Bookkeeper Partner/1GB)	1	1	0	+	0 Book(s) \$ 0 (Up to current subscription)
BKP-Standard Accounts Book DB (Bookkeeper Partner/5GB)	5	3	0	+	0 Book(s) \$ 0 (Up to current subscription)
CONSOLIDATE BOOK	20	20	0	+	0 Book(s) \$ 0 (Up to current subscription)
Large accounting book with high inventory	10	10	0	+	0 Book(s) \$ 0 (Up to current subscription)
SIM-Simple Accounts Book DB (accounting-only/5GB)	5	5	0	+	0 Book(s) \$ 0 (Up to current subscription)
STD-Standard Accounts Book DB (20GB)	20	20	1	+	0 Book(s) \$ 0 (Up to current subscription)
TRG-Free Training Account Book (max 500 trans)	25	25	0	+	0 Book(s) \$ 0 (Up to current subscription)
TOTAL ACCOUNT BOOKS:	1	0	0	+	0 Book(s) \$ 0.00 (Up to current subscription)

EXTRA STORAGES

				AMOUNT
Extra Data Storage (Gb)	0	+	0 Gb(s)	\$ 0 (Up to current subscription)
Extra File Storage (Gb)	0	+	0 Gb(s)	\$ 0 (Up to current subscription)
TOTAL:	0	+	0 Gb(s)	\$ 0 (Per Month)

SPECIAL APPLICATIONS

	AMOUNT
<input type="checkbox"/> POINT-OF-SALES SOFTWARE	\$ 0.00 (Up to current subscription)
TOTAL MODULE FEES:	\$ 0.00 (Up to current subscription)

3. Once you've already added new Accountbook on the Subscription, You can now Add the new book.

Navigate to **Company List -> Click +Add New Company**

Uniq365

Dashboard

Renew Subscription

Update Subscription

Company List

User List

Storage Management

Clone Data

Invoice History

Payment Receipt History

Consolidation Template

Change Admin Ownership

Companies

+ Add New Company

SrNo	Code	Name	Email
1	Uniq365DemoAcco	Uniq365 Demo Account Book	admindemo01@a2000.net

10 records

Encode the Required Information on the new Accountbook. Once Done, Click the SAVE Button.

Uniq365

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Add New Company

Info Backup

Save

ADM

ADMINISTRATOR

NEW BOOK SAMPLE

STD-Standard Accounts Book DB (20GB)

ACCOUNTING & CORP SERVICES

SG | Singapore

Select base currency

January

admindemo01@a2000.net

94327837

I agree to the Uniq365 Service Agreement and Privacy Policy.

4. Go back to the Company List to verify the newly created Accountbook.



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- User List
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Companies

[+ Add New Company](#)

SrNo	Code	Name	Email	Phone
1	Uniq365DemoAcco	Uniq365 Demo Account Book	admindemo01@a2000.net	94327837

10 records

Revision #18

Created 7 January 2025 08:21:51 by Admin Uniq365

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