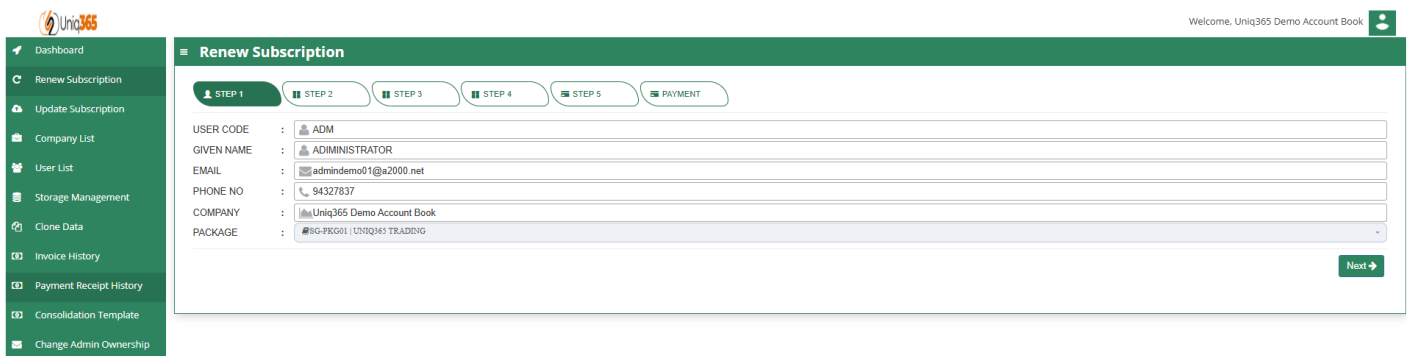


# Customer Portal - Update Subscription

Update Subscription is where the UNIQ365 Customers can process any amendments of their current/existing subscription. They have the option to update their desired number of User Types and classification, No of Books to Configure and enable other custom functionality.

## 1. STEP 1, CUSTOMER DETAILS

It shows the primary Customer Details such as User Code, Given Name, Email, Phone No, Company and Package Selection.



The screenshot displays the 'Renew Subscription' interface in the Uniq365 Customer Portal. The page is titled 'Renew Subscription' and features a progress bar with six steps: STEP 1 (active), STEP 2, STEP 3, STEP 4, STEP 5, and PAYMENT. The left sidebar contains a navigation menu with options: Dashboard, Renew Subscription, Update Subscription, Company List, User List, Storage Management, Clone Data, Invoice History, Payment Receipt History, Consolidation Template, and Change Admin Ownership. The main content area shows the following customer details:

USER CODE	: ADM
GIVEN NAME	: ADMINISTRATOR
EMAIL	: admindemo01@a2000.net
PHONE NO	: 94327837
COMPANY	: Uniq365 Demo Account Book
PACKAGE	: SG-PKG01   UNIQ365 TRADING

A 'Next' button is located at the bottom right of the form.

## 2. STEP 2, USER TYPE DETAILS

In this step you can revise the number of users (Add/Reduce) If you are reducing the number of users, please deactivate the users from the respective account book(s) first. You cannot reduce the subscription users below the number of distinct users in all your account books.

Update Subscription

STEP 1
STEP 2
STEP 3
STEP 4
STEP 5
PAYMENT

ERP SYSTEM				AMOUNT
FIN- Finance User Subscription	10	+	0	User(s) \$ 0 (Up to current subscription)
FULL-Full System User	20	+	0	User(s) \$ 0 (Up to current subscription)
MOB- Mobile User Subscription	10	+	0	User(s) \$ 0 (Up to current subscription)
OPS- Operations User Subscription	10	+	0	User(s) \$ 0 (Up to current subscription)
<b>TOTAL USER COUNTS :</b>	50	+	0	User(s) \$ 0.00 (Up to current subscription)

← Previous
Next →

## TYPES OF USERS

- **FINANCE USER.** User who are assigned this access can only access the finance tab, which comprises the General Ledger, Cash Book, Accounts Receivables and Accounts Payable module.
- **OPERATIONS USER.** User who are assigned this access can only access the operational tabs, which comprises the Sales, Procurement and Inventory module.
- **MOBILE USER.** User who are assigned this access can only access the system via a mobile device to run mobile sales and warehouse functions.
- **FULL USER.** User who are assigned this access can only access the all the tabs and modules which are accessible to FINANCE, OPERATIONS and MOBILE users
- 

### CAN I ADD/REDUCE NEW USERS AT ANYTIME?

Yes, you may add any number of new users in your Subscription Plan. Any users added halfway in the subscription period will be pro-rated to the duration left till the next expiry. For example, in 3 months into your subscription period you may add a new user. This new user will be billed for only 9 months till the end of the mother-contract

No, you may not reduce the number of users halfway through a subscription period. You must wait till the end of subscription period and then reduce according to your needs, only during renewal.

## 3. STEP 3, ACCOUNTBOOK DETAILS, EXTRA STORAGE & SPECIAL APPLICATION(CUSTOMIZATION)

Depending on the package they have selected, the details on the quantity of storage and account books will be displayed here.

In any event, they can access more storage if they've used up all of their subscription storage by modifying the desired add-ons for this steps.

**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 (Full/Locked/5GB)	5	5	0	+	0 Book(s) \$ 0 (Up to current subscription)
ARC-Archived Accounts Book DB (Full/Locked/50GB)	50	50	0	+	0 Book(s) \$ 0 (Up to current subscription)
ARC-Archived Accounts Book DB (Full/Locked/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)
<b>TOTAL ACCOUNT BOOKS :</b>				<b>1</b>	<b>0 Book(s) \$ 0.00 (Up to current subscription)</b>

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
<b>TOTAL :</b> 0	<b>0 Gb(s) \$ 0 (Per Month)</b>

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

← Previous Next →

#### 4. STEP 4, OCR, SMS, WHATSAPP AND E-INVOICE LIMIT

Any excess of usage in the package that the customer availed it will be subject to corresponding charges.

Welcome, Uniq365 Demo Account Book

**Update Subscription**

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

OCR	AMOUNT
<input type="checkbox"/> Optical Character Recognition (OCR) Module	0.00 (Up to current subscription)
1050 Scans	0
<b>TOTAL OCR AMOUNT :</b>	<b>\$ 0.00 (Up to current subscription)</b>

SMS	AMOUNT
0 SMS(s)	0
<b>TOTAL SMS AMOUNT :</b>	<b>\$ 0 (Up to current subscription)</b>

WHAT SAPP	AMOUNT
50 Message(s)	0
<b>TOTAL WHAT SAPP AMOUNT :</b>	<b>\$ 0 (Up to current subscription)</b>

E-INVOICE	AMOUNT
0 E-Invoice(s)	0
<b>TOTAL E-INVOICE AMOUNT :</b>	<b>\$ 0 (Up to current subscription)</b>

← Previous Next →

#### 5. Step 5, SUBSCRIPTION SUMMARY

The Subscription Summary will give you an overview of the Summary Payment from Total Number of Users, Total Number of Accountbook, Total Storages and Summary of Special Applications

including OCR.

- Payment Type will be classified by Monthly and Yearly as an Option which includes identification of Duration.
- Once all are in place and countercheck, the user needs to agree with the **Uniq365 Service Agreement & Privacy Policy** before renewing.
- An indication of the validity timeline of the renewal is also indicated on the below right most part of the user interface.

The screenshot shows the 'Renew Subscription' interface. At the top, there is a progress bar with steps 1 through 5, and 'STEP 5' is currently active. Below the progress bar is the 'SUBSCRIPTION SUMMARY' section. It includes a 'Payment Type' dropdown set to 'Yearly' and a 'Duration' dropdown set to '2'. The summary table lists the following items and costs:

Item	Unit	Cost	Duration
ERP SYSTEM			
ERP SYSTEM USERS	SGD	38,240.00	(2 Years)
NUMBER OF ACCOUNT BOOKS	SGD	360.00	(2 Years)
EXTRA STORAGES	SGD	0.00	(2 Years)
SPECIAL APPLICATIONS	SGD	0.00	(2 Years)
TOTAL :	SGD	38,600.00	(2 Years)
OCR			
OCR	SGD	100.00	(2 Years)
TOTAL :	SGD	100.00	(2 Years)
GRAND TOTAL :	SGD	38,700.00	(2 Years)
PACKAGE DISCOUNT (75.00 %) :	SGD	29,025.00	
GRAND TOTAL (AFTER DISCOUNT) :	SGD	9,675.00	
G_SRS   GST 9% :	SGD	870.75	
GRAND TOTAL(AFTER GST) :	SGD	10,545.75	(2 Years)
(SAVING) :	SGD	15,480.00	

At the bottom left, there is a checkbox for 'I agree to the Uniq365 Service Agreement and Privacy Policy' which is checked. Below it are 'Previous' and 'Download Invoice (Online)' buttons. At the bottom right, a yellow banner states 'Your account book will be activated until 13-01-2027 12:00:00'.

## 6. STEP 6, PAYMENT

Renewal Payment Option via CREDIT CARD or PAYNOW.

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