Pajak365

Powered by Falcon-SC Tax Intelligence

THE FALCON TEAM HANDBOOK

Know the work. Use the tools. Deliver with care.

A complete feature and onboarding guide for the internal Pajak365 pilot.

Purpose. Workflow. Evidence. Judgment.

For Falcon owners, partners, consultants, finance staff and the participants who support client delivery.

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READING MAP

Find your way, quickly.

Read pages 3-8 first. Use the feature chapters as a desk reference.

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This guide explains the current product. It is not tax advice or confirmation that every readiness control has been completed. Roles and permissions determine which features you see.

FALCON OPERATING GUIDE

The right account for the right work.

Two access routes. Individual accountability for live work.

Two ways to enter

Demo role	Role password at /demo-access. Fictional shared workspace for that role. No paid AI calls. No ChatGPT account required.
Named staff account	Sign in with ChatGPT at /login using your own account. Falcon grants active membership, role, client scope and expiry. Invitation emails are not sent by the platform.
Owner account	The configured site owner manages demo credentials and AI spending. Do not share the owner's personal ChatGPT password or API key.

Start with the role that fits your responsibility

Owner / Partner	Firm control, technical review and appropriate approvals. A different account is required for independent reviews where enforced.
Consultant / Counsel / Expert	Prepare scoped work. Counsel focuses on dispute evidence; experts contribute specialist analysis. Access depends on role and assigned clients.
Finance	Quotations, billing, receipts and permitted commercial records. Finance is not a substitute for technical tax judgment.
Client / Individual / Small business	Supply information and originals, respond to requests and follow permitted client services.
Associate / Affiliate	Vetted, time-limited project participation. Affiliate access also supports assigned origination and sharing records.
Other participants	Auditor, payroll, counterparty, lender, investor, regulator, researcher, educator and technology roles receive limited surfaces. Missing menus may be intentional.

Team rule

Give each live staff member a named account. People using the same demo-role password share its saved sample work. Share demo credentials only with the intended demo team.

FALCON OPERATING GUIDE

Your first 60 minutes.

A suggested training agenda, not a platform deadline.

00-10 min | Get oriented

Enter your assigned demo role. Confirm the role and workspace. Open My next actions or your guided tour. Switch the interface language if helpful; entered facts and report files are not automatically translated.

10-25 min | Follow one journey

Commercial staff: enquiry to quote. Technical staff: evidence to draft. Delivery staff: request to closeout. Finance: invoice to recorded receipt. Clients: offer to information request. Explore one connected case before moving between services.

25-40 min | Produce something useful

Open a fictional record, inspect the supporting original and identify an unresolved gap. Preview a report. Download a PDF from the sample library and compare its structure with the underlying workstream.

40-50 min | Practise review

Explain what remains draft, what the evidence supports and who must review next. Compare green, amber and red workflow attention states without treating a colour as a tax-compliance opinion.

50-60 min | Agree the next action

Record a learning question and a next action for your manager. For live AI, use an authorised production account with verified excerpts and provider consent; a demo account cannot make a paid call.

A good first session

You can name the right workspace, find one original, explain one review gate, download one sample report and identify the next responsible person.

FALCON OPERATING GUIDE

One engagement, from need to handover.

The client experience and the internal delivery controls should tell the same story.

01 | Discover and scope

Assess needs, record client facts, qualify the opportunity and agree service boundaries. A suggested service is a discussion starting point.

02 | Quote and release

Build itemised scope and fees. Submit the current version for approval, resolve revisions and release the authorised offer. Internal approval and client release are separate.

03 | Accept and onboard

Record client acceptance, prepare the engagement letter and collect identity, authority, contact and original-record information. Resolve onboarding gaps before treating work as ready.

04 | Plan and request

Assign responsibility, milestones and due-date evidence. Request originals with clear client instructions. Review responses instead of treating upload as verification.

05 | Analyse and review

Prepare the service workstream. Reconcile calculations and preserve legal-source context. Use AI within its enabled route, then obtain the required independent review.

06 | Deliver and close

Approve the exact package, share permitted updates, record the client response and close reviewed work. Follow feedback and renewal needs; keep billing and official filing evidence distinct.

FALCON OPERATING GUIDE

Know what a status actually proves.

Status labels describe a workflow assertion. They do not replace the underlying evidence.

Read these terms carefully

Uploaded	An original is stored. Its facts and legal relevance still require review.
Verified	A recorded check for the relevant document or source. Confirm who checked it, when, against which original and version.
Draft / In review	Work is being prepared or checked. Do not present it as a released client position.
Approved / Released	Read the specific workflow: approved quotation is not client release; approved delivery is not a government filing.
Acknowledged	For filing, an official receipt must be attached and reconciled. A client acknowledgement has a different meaning.
Changed / Review expired	Facts, sources or versions no longer match the earlier review. Refresh the evidence and repeat the required checks.

Preserve the evidence chain

Original -> checked excerpt -> calculation or argument -> current draft -> independent review -> authorised release. Keep the client, period, source version and reviewer identity attached throughout.

When to stop and escalate

An unverified deadline, conflicting source, unsupported benchmark, unexplained reconciliation difference or changed reviewed input should become a visible blocker. Ask the responsible Falcon professional to resolve it.

Useful review notes

State exactly what you checked, what differs, its practical impact and the next action. A checkbox or “looks good” is not enough to explain a professional judgment.

FALCON OPERATING GUIDE

Demonstrate live AI with fictional facts.

Preparation is available in authorised production testing. Demo accounts stay isolated.

Prepare the demonstration

1. Sign in	Use your own authorised ChatGPT account at /login. Confirm production workspace access. The configured owner checks AI cost controls.
2. Install a fictional case	Open AI evaluation register and install the 50-case fictional challenge pack. Start with Distribution margin and unsupported benchmark.
3. Verify inputs	Review the preserved fictional original in Digital evidence vault and enter a checked excerpt. Select and verify the actual official source, permitted excerpt, version, date and professional verifier in Tax knowledge.
4. Generate	Open the workstream's drafting studio. Choose factual preparation, review the displayed inputs and confirm permission to send them. A disabled route cannot be bypassed by changing the prompt.
5. Review	Inspect the output against originals and calculations. Identify missing benchmark evidence. Preserve the current draft and arrange independent Falcon review before reliance.

A useful demonstration prompt

"Summarise the supplied fictional facts, calculate operating profit and operating margin, identify missing evidence, and prepare an internal factual memorandum. Cite only supplied references. Do not conclude that the price is arm's length."

What to check

Revenue IDR 1 billion less costs IDR 950 million = profit IDR 50 million; margin on sales = 5%. A positive margin does not establish an arm's-length result. The model should identify the missing benchmark.

Practical boundary

The handbook is not permission to send confidential data. Confirm the firm's data-handling arrangements and provider consent. Live legal interpretation uses the separate structured trial and qualification workflow.

FALCON OPERATING GUIDE

Choose by task. Keep judgment with Falcon.

Enabled models and budgets are current in AI cost controls, not fixed by this handbook.

Task-based routing

Routine preparation	Use the least costly enabled, evaluated route that preserves facts, citations and limitations. Compare results before changing routes.
Substantive interpretation	Use a qualified interpretation route only after frozen trials and independent Falcon assessment. A stronger model name does not establish legal accuracy.
Difficult dispute or conflicting sources	Compare a stronger candidate on the difficult frozen cases. Require evidence that the additional quality justifies its cost.
Document reading and arithmetic	Use local PDF/Excel/OCR and exact supplied-rule arithmetic where available. Do not pay a language model to reproduce a deterministic calculation.

Current policy is in the application

Open AI cost controls to inspect the enabled model, task route, spending limits, testing expiry and retained allowance. This guide neither activates a model nor extends the testing period.

Interpretation qualification

For each permitted workstream type, preserve independent provider passes on distinct workstreams covering facts, citation support, legal applicability, calculations and missing facts. Apply the actual owner activation gate in the application; count alone is not an accuracy guarantee.

Cost discipline

Keep per-call, daily, case and staff allowances within the app ceiling. Unknown provider outcomes retain their reserved allowance until reconciled. App controls cover Pajak365 calls; other API usage in your account is outside these controls.

FEATURE CHAPTER 01

Decide what needs attention.

Start with priorities, then inspect the evidence behind the signal.

1 Command centre

What it is for One view of revenue, delivery and risk.

Objective Spot the decisions that need attention today.

How to use it Review exceptions, open the related record and identify the responsible person.

A good result You can explain the next decision and its underlying evidence.

Owner, Partner and permitted staff | Open feature

2 My next actions

What it is for A personal queue across review, response and follow-up work.

Objective Reduce searching and missed handoffs.

How to use it Open your queue, choose the current-version item and complete or escalate the next action.

A good result The action has an owner and an explicit outcome.

Role-specific staff | Open feature

3 Revenue radar

What it is for Evidence-based indications of additional service needs.

Objective Turn an observed client gap into a scoped discussion.

How to use it Inspect the signal, confirm the underlying facts and discuss need before creating a new offer.

A good result A qualified opportunity, not an assumed sale or automatic tax recommendation.

Permitted advisory staff | Open feature

FEATURE CHAPTER 02

Understand the client. Agree the scope.

Good delivery begins with a clear commercial promise.

1 Client intelligence

What it is for Shared company and group profile behind engagements.

Objective Avoid inconsistent assumptions across services.

How to use it Confirm entity, contacts, ownership and business context before linking new work.

A good result The correct entity and reliable context are attached to the engagement.

Falcon delivery team | Open feature

2 Acquisition & quotes

What it is for Qualify an enquiry and move an opportunity toward a defined engagement.

Objective Separate interest from an agreed mandate.

How to use it Record the need, source, service, next action and responsible person; link the appropriate quote.

A good result A traceable opportunity with a clear commercial next step.

Owner, Partner, Finance and permitted originators | Open feature

3 Quotation studio

What it is for Versioned scope, exclusions, fee assumptions and itemised pricing.

Objective Make the promised deliverables and commercial terms explicit.

How to use it Build included, optional and reimbursable rows; review validity and responsibilities; submit the current version.

A good result A quotation ready for authorised review, not silently accepted work.

Owner, Partner and Finance | Open feature

FEATURE CHAPTER 03

Approve, contract and onboard.

Three distinct controls before delivery proceeds.

1 Quotation approvals

What it is for Current-version review and client-release checks for offers.

Objective Prevent unapproved or stale terms from reaching the client.

How to use it Inspect scope, fees and exceptions; resolve revisions; release the approved exact version.

A good result A recorded authorisation and separate permitted client release.

Owner, Partner and Finance | Open feature

2 Engagement letters

What it is for Engagement-linked preparation, approval, release and client response.

Objective Align the formal agreement with accepted scope.

How to use it Prepare from the accepted quotation, review the exact terms and obtain the appropriate client response or signed evidence.

A good result A traceable agreement history. A recorded acknowledgement is not proof of every legal execution requirement.

Commercial and delivery team | Open feature

3 Client onboarding

What it is for Client details, authority, contacts and original-record review.

Objective Begin delivery with an understood mandate and visible gaps.

How to use it Request information, inspect original evidence, resolve exceptions and record readiness.

A good result The engagement’s onboarding blockers are resolved or explicitly controlled.

Owner, Partner, Consultant and Finance | Open feature

FEATURE CHAPTER 04

Coordinate the work.

Plan delivery at the engagement level, then assign actionable tasks.

1 Engagement delivery

What it is for Scope, responsibility, onboarding and service completion context.

Objective Keep the accepted mandate central to delivery.

How to use it Confirm the service, owner, milestones and supporting engagement records before work moves forward.

A good result One accountable engagement with traceable commercial and delivery context.

Falcon delivery team | Open feature

2 Delivery hub

What it is for A shared view of accepted work, client blockers and completion reviews.

Objective Identify what can progress and what needs intervention.

How to use it Review outstanding requests, milestone work and required professional completion checks.

A good result Blockers and next reviewers are visible to the team.

Owner, Partner, Consultant and Finance | Open feature

3 Work & requests

What it is for Assigned work and client follow-through.

Objective Convert an issue into a clear action.

How to use it Specify the owner, priority, due-date basis and useful instructions; link the relevant case or engagement.

A good result A completed action with enough context for the next person.

Staff and permitted participants | Open feature

FEATURE CHAPTER 05

Request, communicate and review.

A client upload, an update and an approval serve different purposes.

1 Document requests

What it is for Structured requests for originals and review of client responses.

Objective Close a specific evidence gap.

How to use it Explain what is needed and why, set a practical request date and inspect each response before resolving the request.

A good result A reviewed response linked to the relevant original.

Owner, Partner, Consultant and Finance | Open feature

2 Client updates

What it is for Engagement-linked progress communication with controlled client visibility.

Objective Keep clients informed without exposing internal material.

How to use it Prepare a useful update, identify allowed recipients and record the permitted client response or acknowledgement.

A good result A clear client-facing status tied to the actual delivery state.

Delivery staff and scoped clients | Open feature

3 Review desk

What it is for Current-version review queues and independent cost approval work.

Objective Make the right reviewer’s next decision easy to find.

How to use it Inspect the exact record and supporting evidence; approve only within your authority or return with a specific reason.

A good result A recorded decision on the current version.

Authorised internal reviewers | Open feature

FEATURE CHAPTER 06

Finish well. Keep the relationship moving.

Handover, feedback and renewal should preserve the client's context.

1 Final delivery & closeout

What it is for Approval of the exact delivery package and client response.

Objective Close a reviewed engagement with a defensible handover.

How to use it Check deliverables, evidence and recipient scope; release the package and record the client response.

A good result A current reviewed package and explicit completion history.

Owner, Partner and Consultant | Open feature

2 Client feedback

What it is for Service feedback, follow-up ownership and resolution.

Objective Turn a client concern into accountable improvement.

How to use it Review feedback, identify the responsible person, follow up and record how the issue was resolved.

A good result A visible resolution trail rather than an untracked comment.

Permitted relationship and delivery staff | Open feature

3 Follow-ups & renewals

What it is for Renewal and further-advice opportunities linked to ongoing client needs.

Objective Maintain continuity after the current engagement.

How to use it Record the need, service, owner and next discussion; qualify any new scope before quoting.

A good result A timed follow-up. No new mandate or fee is assumed.

Owner, Partner, Consultant and Finance | Open feature

FEATURE CHAPTER 07

Understand the commercial outcome.

Invoice status, cash collection and project economics are separate.

1 Billing & collections

What it is for Issued invoices, milestone billing and recorded receipts.

Objective Know what is due and what has been evidenced as received.

How to use it Review the billing plan, issue authorised invoices and reconcile supported external receipt records.

A good result An explainable balance. The app records receipts; it does not transfer money.

Owner, Partner and Finance | Open feature

2 Engagement profitability

What it is for Private budgets, reviewed costs and forecast contribution.

Objective See whether the engagement is economically sustainable.

How to use it Compare planned and incurred costs, remaining work and approved cost evidence.

A good result A supported internal estimate, separate from fees collected.

Authorised economics roles | Open feature

3 Profit-sharing statements

What it is for Reviewed costs and agreed contribution allocations against collected professional fees.

Objective Make partner and team allocations reproducible.

How to use it Confirm the agreement, recipients, percentages, receipts and cost treatment before approval.

A good result An approved allocation snapshot; external payout evidence remains separate.

Owner, Partner and permitted Finance / Affiliate access | Open feature

FEATURE CHAPTER 08

Build transfer pricing evidence.

Analyse the transaction before accepting a label or benchmark.

1 Transfer pricing studio

What it is for Local File, Master File and CbC-readiness preparation.

Objective Connect business facts, FAR, method selection and reconciled financial results.

How to use it Choose the document type, populate the facts, link evidence, explain alternatives and inspect completeness gaps.

A good result A reviewable draft; an entered range does not establish arm's-length compliance.

Technical team | Open feature

2 Controlled transactions

What it is for Related-party transaction details, agreements, actual conduct and benefit evidence.

Objective Understand what actually occurs and who controls the risks.

How to use it Record each transaction, counterparty, amount, terms and evidence; distinguish services, goods, finance and royalties.

A good result Transaction-specific evidence supporting the analysis.

Consultant, Expert and authorised technical staff | Open feature

3 Comparable screening

What it is for Reproducible candidate acceptance and rejection records.

Objective Support comparability choices with provenance and reasons.

How to use it Record database/search context, financial basis, filters, acceptance/rejection rationale and adjustments.

A good result A defensible screening trail. Demo candidates are not a licensed benchmark search.

Technical team | Open feature

FEATURE CHAPTER 09

Manage tax issues and deadlines.

A scenario is a model; a dispute position is a professional judgment.

1 Dispute & defence

What it is for SP2DK, audit, objection, appeal, judicial review, MAP and APA case preparation.

Objective Preserve facts, authority positions, opposing analysis and evidence.

How to use it Confirm stage and period, inspect originals, document the competing position and verify deadline/service evidence.

A good result An evidence-led case file. No statutory deadline is inferred from a sample date.

Consultant, Counsel, Expert and authorised reviewers | Open feature

2 Advisory & scenarios

What it is for Tax and business sensitivities using explicit input assumptions.

Objective Understand the impact of a reviewed assumption before recommending action.

How to use it Enter the base, rate assumption, deductions and credits; compare outcomes and record limitations.

A good result Transparent arithmetic. Rate, deductibility, incentives and eligibility remain professional questions.

Permitted advisory staff | Open feature

3 Compliance calendar

What it is for Obligation preparation and review states with deadline-source context.

Objective Know who owns an obligation and which date is verified.

How to use it Identify the tax and period, preserve the official deadline basis, assign responsibility and track preparation.

A good result An evidence-supported obligation calendar; a date field alone is not authority.

Staff and permitted compliance participants | Open feature

FEATURE CHAPTER 10

Deliver recurring and diagnostic services.

The same evidence discipline applies beyond transfer pricing.

1 Pajak365 Tax Care

What it is for Monthly reconciliations and obligation tracking.

Objective Maintain a reliable recurring preparation routine.

How to use it Define period and scope, reconcile ledger/document/return values and keep exceptions visible.

A good result A reviewed recurring working package with documented gaps.

Falcon delivery team | Open feature

2 Pajak365 Tax Health Check

What it is for Diagnostic coverage, findings and remediation priorities.

Objective Make risk and corrective work understandable.

How to use it Set coverage and sample basis; record finding, severity, evidence, impact and next action.

A good result A scoped diagnostic and remediation plan, not a blanket compliance assurance.

Falcon delivery team | Open feature

3 Pajak365 VAT & Refund

What it is for VAT reconciliation, refund-applicability review and supporting registers.

Objective Prepare a defensible working file for professional decision.

How to use it Reconcile values, inspect input/output-tax evidence and document eligibility questions.

A good result A reviewed readiness file. A report does not establish refund entitlement or approval.

Falcon delivery team | Open feature

FEATURE CHAPTER 11

Preserve originals and official context.

Keep preparation resilient while external filing remains separate.

1 Coretax operations

What it is for Local preparation, manual submission tracking and official receipt reconciliation.

Objective Keep working through outages and distinguish attempts from acknowledgement.

How to use it Prepare the package, use an authorised external channel and reconcile its actual official receipt to the package.

A good result Evidence of external submission/receipt. Exports are not validated DJP XML.

Authorised filing and compliance staff | Open feature

2 Digital evidence vault

What it is for Preserved originals, SHA-256 hashes, linked versions, holds and disclosure scope.

Objective Maintain retrievable evidence without silently replacing it.

How to use it Upload the correct original, check metadata and scope, link new versions and enter reviewed excerpts when needed.

A good result The exact original remains available. A hash proves integrity, not substantive truth.

Falcon delivery team | Open feature

3 Tax knowledge

What it is for Official-source excerpts, version/amendment context and professional verification.

Objective Give analysis a traceable legal basis.

How to use it Check the original instrument, current amendments, relevant period and permitted excerpt; record verifier and date.

A good result A verified source for the intended question. An official URL alone is insufficient.

Falcon delivery team | Open feature

FEATURE CHAPTER 12

Run checks. Control participation.

Permissions and configuration should reflect the actual engagement.

1 Quality & assurance

What it is for Reproducible checks and professional review context.

Objective Find missing or inconsistent inputs before release.

How to use it Inspect the exceptions, resolve the supporting record and preserve the current review trail.

A good result Known gaps are resolved or explicitly escalated; automatic checks are not legal certification.

Falcon delivery team | Open feature

2 Ecosystem access

What it is for Named membership, participant role, client scope, expiry and suspension.

Objective Give each participant only the access needed for their work.

How to use it Match the member’s sign-in email, select the appropriate role and companies, set expiry and review revocation needs.

A good result An active scoped membership. The owner supplies the workspace link directly.

Owner and authorised membership managers | Open feature

3 Connections & controls

What it is for Integration status, workspace policy and audit export.

Objective Understand what is actually connected and preserve operational records.

How to use it Inspect connection indicators, confirm workspace context and export the relevant audit history.

A good result A truthful integration picture. Coretax, payments and email are not implied by a status label.

Authorised internal staff | Open feature

FEATURE CHAPTER 13

Staff projects with clear authority.

Vetting and availability precede scoped assignment.

1 Talent network

What it is for Associate, specialist and affiliate profiles, skills, credentials and conflicts.

Objective Create a reliable professional participation record.

How to use it Review credentials, availability, capacity, terms and conflict disclosures before vetting.

A good result A reviewed profile that can support the assignment decision.

Owner, Partner and permitted profile owner | Open feature

2 Project assignments

What it is for Time-limited project scope, reviewer, fees, budgets and delivery records.

Objective Agree the responsibility before granting project participation.

How to use it Link vetted talent and engagement, specify dates and cap, record time/delivery and obtain authorised review.

A good result A scoped active assignment and reviewable fee evidence.

Owner, Partner and assigned participants | Open feature

3 Capacity & staffing

What it is for Expertise and confirmed capacity matched to project demand.

Objective Allocate the right person without assuming unlimited availability.

How to use it Inspect approved work, confirmed capacity and skill fit; agree a bounded assignment.

A good result A supported staffing decision linked to the engagement.

Authorised staffing team | Open feature

FEATURE CHAPTER 14

Build relationships and capability.

Partners, learning and the client portal connect people to the work.

1 Partner portfolios

What it is for Affiliated-partner targets, originated leads and engagement agreements.

Objective Make responsibility and commercial participation explicit.

How to use it Link vetted profile, period, target and opportunities; confirm relationship responsibilities and agreement terms.

A good result A traceable partner portfolio; a target is not revenue collected.

Owner, Partner, permitted Finance and Affiliate | Open feature

2 Falcon academy

What it is for Practical evidence, transfer pricing and Coretax preparation assessments.

Objective Build shared vocabulary and workflow literacy.

How to use it Read a lesson, answer the practical question and explain the reasoning with your reviewer.

A good result A learning checkpoint, not a professional credential or model qualification.

Permitted staff, researchers and educators | Open feature

3 My services / client journey

What it is for Client-facing needs, offers, documents, updates, handover and responses.

Objective Let the client understand and act on their permitted services.

How to use it Choose the correct company, respond to released requests and check the current delivery state.

A good result An authorised client response tied to the correct company and exact record.

Scoped clients and permitted internal service team | Open feature

FEATURE CHAPTER 15

Choose the right service route.

A preparation route helps scoping; it does not determine tax eligibility.

1 Tax Needs Assessment

What it is for Structured facts about entity profile, records, recurring work, related parties and cross-border needs.

Objective Start an informed service conversation.

How to use it Answer based on known facts, inspect suggested services and have Falcon confirm scope.

A good result A useful needs record, not an automated tax opinion.

Prospective clients and permitted staff | Open feature

2 Tax Express

What it is for Personal and small-business intake, originals and adviser escalation.

Objective Collect enough information for the appropriate preparation route.

How to use it Provide income, assets, liabilities, residency and original evidence; flag foreign/business/complex issues.

A good result A preparation candidate or adviser-led route. No automatic return filing.

Individuals, small businesses and permitted Falcon staff | Open feature

3 Prospect enquiries

What it is for Internal acquisition access and recorded prospect requests.

Objective Respond to incoming needs with accountable follow-through.

How to use it Review the enquiry, confirm suitability and privacy context, then record the next contact/scoping action.

A good result A traceable enquiry response and qualified next step.

Configured owner / authorised acquisition access | Open feature

FEATURE CHAPTER 16

Make readiness evidence visible.

These controls support a decision; the guide does not mark them complete.

1 Workspace recovery

What it is for Preserved records, originals and recovery evidence export.

Objective Prepare for an actual recovery exercise.

How to use it Inspect issues, preserve the relevant package and rehearse restoration under the firm’s process.

A good result Evidence of a successful drill, including permissions and audit history. Export alone is not tested recovery.

Owner and Partner | Open feature

2 Launch readiness

What it is for Eight controls for access, privacy, recovery, incident response, AI, methodology, journey and filing.

Objective Give owners a current evidence-based launch decision.

How to use it Assign responsibility, preserve original evidence and obtain a different account’s review before treating a control as reviewed.

A good result Current independent evidence. This handbook does not grant launch approval.

Owner and Partner | Open feature

3 Client pilots

What it is for Bounded pilot scope, start/pause/stop, issue tracking and independent review.

Objective Learn from controlled real use without losing accountability.

How to use it Plan the pilot, confirm prerequisites, record blocking issues and review the exact results before expansion.

A good result A documented pilot outcome, with unresolved issues kept visible.

Owner and Partner | Open feature

FEATURE CHAPTER 17

Operate AI as a reviewed workflow.

Provider output, professional comparison and final judgment are different records.

1 AI evaluation register

What it is for Frozen expected results, provider evidence, model coverage and independent comparisons.

Objective Qualify a model for a defined type of work.

How to use it Prepare evidence and legal expectations, freeze criteria, run the planned trial, compare and obtain independent review.

A good result Current provider evidence; no invented passes or retroactive criteria.

Owner and Partner; candidate trials require configured owner | Open feature

2 Tax interpretation & expert review

What it is for Structured questions, period/source checks, competing readings and Falcon judgment.

Objective Make the reasoning and source applicability reviewable.

How to use it Prepare a verified brief, check exact articles and effective periods, run an allowed analysis/trial and record independent final judgment.

A good result A current professional position only after the required review. Trial-only output cannot receive client judgment.

Professional team; final reviewers Owner / Partner | Open feature

3 AI cost controls

What it is for Route selection, pause/resume, spend tracking, expiry and conservative reservations.

Objective Bound spending and restrict unqualified task routes.

How to use it Check the current policy, retained allowances and qualification evidence; record a reason for authorised changes.

A good result A traceable owner decision with app-level limits. Other account API usage is outside this app’s ceiling.

Configured owner only | Open feature

FEATURE CHAPTER 18

Compare models. Preserve legal sources.

Workspace > Falcon intelligence & delivery. Owners, partners and assigned consultants only.

1 AI benchmark

What it is for Choose models using reviewed evidence and cost, rather than a confident-looking answer.

Objective Identify which permitted model meets the reviewed criteria for a particular task.

How to use it A fictional challenge, frozen expected results and a budgeted provider trial. Explore a challenge, establish its expected legal result, then use the evaluation laboratory.

A good result Current independent provider evaluations. The 50-case catalogue itself does not qualify a model.

Owner, Partner and assigned Consultant | Open feature

2 Regulation research

What it is for Keep the exact source, version and applicability behind every interpretation.

Objective Make instrument identity, effective period and applicability reviewable.

How to use it An official URL or preserved original, instrument, period and permitted excerpt. Preserve the original, verify the exact instrument and request independent review.

A good result A preserved source snapshot and an independent applicability review. Checks run on demand.

Owner, Partner and assigned Consultant | Open feature

FEATURE CHAPTER 19

Read originals. Prepare service work.

Workspace > Falcon intelligence & delivery. Owners, partners and assigned consultants only.

1 Document reconciliation

What it is for Find missing records, changed versions and differences hidden by matching totals.

Objective Explain every line exception using the preserved originals.

How to use it Preserved PDF, image, Excel or CSV originals with explicit number formats. Read an original, compare the extracted text, then reconcile two verified registers.

A good result Candidate extraction and line differences with original row or page locators. Local reading makes no paid AI call.

Owner, Partner and assigned Consultant | Open feature

2 Service workpapers

What it is for Prepare a complete evidence and reasoning trail for the chosen tax service.

Objective Give the independent reviewer a complete service-specific basis for judgement.

How to use it Scope, period, verified sources, original evidence and one of eight playbooks. Complete the facts, competing analysis, conclusion, limitations and service checks.

A good result A reviewed internal workpaper with a PDF. Client release and official filing remain separate.

Owner, Partner and assigned Consultant | Open feature

FEATURE CHAPTER 20

Reuse reasoning. Measure delivery.

Workspace > Falcon intelligence & delivery. Owners, partners and assigned consultants only.

1 Falcon knowledge

What it is for Reuse supported reasoning while keeping each client and new judgement distinct.

Objective Carry useful reasoning forward without transferring an earlier approval.

How to use it A current approved workpaper, reasoning abstract and applicability limits. Review an abstract independently before starting a new draft within its client scope.

A good result A separately reviewed precedent. Reuse creates a new draft with approval and checks reset.

Owner, Partner and assigned Consultant | Open feature

2 Delivery performance

What it is for Measure the total preparation and review effort, corrections and conservative AI costs.

Objective Compare preparation plus review effort using a defensible baseline.

How to use it An approved workpaper, comparable baseline and actual preparation and review times. Record a defensible baseline after approval. Owners and partners can run scoped checks.

A good result Current delivery measurements and historical operational observations, not a security certification.

Owner, Partner and assigned Consultant | Open feature

FALCON OPERATING GUIDE

Rehearse the six tools, safely.

A 45-minute fictional workshop. Never treat demo labels as live verification.

00-10 min | Follow the two differences

Enter a staff demo account and open the intelligence tour. Load the fictional registers. Both totals are IDR 150 million, but transaction DEMO-101 differs by +10 million and DEMO-102 by -10 million. Explain why a matching total does not resolve either exception.

10-20 min | Inspect the originals

Read the preserved CSV or a sample PDF locally. Compare candidate text with its original row or page. OCR can misread figures; correct and record the source location. A demo document's Verified label is simulated, not professional verification.

20-30 min | Inspect one service draft

Open the monthly workpaper, then another of the eight services. Explain its scope, missing facts, proposed alternatives and source gaps. Checkboxes start unchecked and no professional conclusion is approved. Download the internal PDF and identify its draft label.

30-40 min | Explain source and reuse gates

Open the research placeholder. It is not tax law. Name the exact instrument, period and applicability evidence that a real reviewer needs. Open the reasoning draft and explain why reuse is blocked until both its parent and its own review are current.

40-45 min | Measure and hand over

For a hypothetical baseline of 60 preparation + 20 review minutes, and actual 20 preparation + 20 review minutes, total savings would be 50%. This example is not saved as a measured outcome. Live measurements need an approved paper and a comparable basis.

Pass the exercise

Name the client scope, inspect an original, find both exceptions, explain one missing legal fact and identify the next independent reviewer. Demo preparation never makes a paid AI call or grants professional approval.

FALCON OPERATING GUIDE

Eight services. One disciplined workpaper.

Choose the service before completing its checklist. A service change resets prior checklist assertions.

Monthly compliance / VAT

Monthly: reconcile books, invoices and returns, identify obligations and explain differences. VAT: assess transaction and invoice evidence, credit conditions, treatment and refund evidence separately.

Withholding / Corporate income tax

Withholding: identify payee, residence, payment classification and tax-bearer terms. Corporate: reconcile financial statements, document fiscal adjustments, verify deductions, credits, periods and rounding.

Transfer pricing / Audits and disputes

TP: actual conduct, functions/assets/risks, method alternatives, licensed comparable provenance and financial reconciliation. Disputes: original notice and receipt proof, procedure, amounts, competing analysis and chronology.

International advisory / Health checks

International: entity/residence, contracts, substance, domestic/treaty applicability and alternatives. Health: scope/materiality, evidence by issue/period, supported findings and accountable remediation.

Optional computation

Supply a verified rule source, base, deductions, rate, credits, rounding and applicability note. Exact decimal arithmetic does not select statutory rates, eligibility, thresholds or special regimes. Do not infer a refund entitlement from excess model credits.

Review and export

Complete facts, competing analysis, proposed conclusion, limitations and all six checks. Link current verified originals and applicable legal sources. A different authorised owner or partner reviews the exact version. Internal approval remains separate from client release and filing.

FALCON OPERATING GUIDE

Twenty service reports. One consistent standard.

Open /sample-reports from Demo access, Demo scenarios, the guide or workspace quick links.

How to use the collection

Preview a report to explain the expected structure: scope, facts, evidence, analysis, calculations, findings, limitations and next actions. Download its PDF for presentation or its Word file for editing. Do not substitute a sample for the actual client workstream.

Collection formats

Individual files	Twenty six-page service PDFs and editable Word files.
Portfolio	One 124-page PDF with the catalogue and all twenty reports.
Presentation kit	ZIP collection plus a separate four-page service catalogue.

Language and use

The interface supports English, Bahasa Indonesia and Chinese. These report files are in English. All report companies, figures and evidence references are fictional. They are presentation material, not a licensed benchmark, official submission or approved tax position.

REPORT REFERENCE

The service-report catalogue.

Use the service name to find its report in the searchable library.

01	Transfer Pricing Local File
02	Transfer Pricing Master File
03	Country by Country Reporting Readiness
04	SP2DK Response and Evidence Report
05	Tax Audit Defence Report
06	Objection and Appeal Strategy Report
07	MAP and APA Feasibility Report
08	Monthly Tax Care Report
09	Tax Health Check Report
10	VAT Reconciliation and Refund Readiness
11	Payroll and Expatriate Tax Review
12	Mergers and Acquisitions Tax Due Diligence
13	International Structuring Advisory
14	Tax Incentive Feasibility Report
15	Customs and Trade Tax Review
16	Global Minimum Tax Readiness
17	Tax Cash Flow Planning Report
18	Tax Technology and Controls Roadmap
19	Annual Corporate Income Tax Review
20	Withholding Tax Reconciliation Report

Each report is a six-page fictional English sample. Click any row to open the library; search the service title, preview the PDF and download the editable Word version. The four-page catalogue and full portfolio are also available.

FALCON OPERATING GUIDE

Turn exploration into confident use.

Suggested onboarding exercise for Falcon managers to facilitate.

A short role-based assignment

Technical staff	Explain the distribution margin, missing benchmark and method limitations. Inspect an original and identify one unsupported conclusion.
Delivery staff	Follow an evidence request through response, review and handover. Identify the current blocker and next reviewer.
Finance	Explain itemised scope, quotation release, invoice status and recorded cash receipts without conflating them.
Client-facing staff	Show the client portal, permitted company scope, next document request and a useful progress update.
Owner / Partner	Explain access boundaries, review independence, AI route status and the evidence required before expanding the pilot.

Manager completion checks

Ask each participant to locate the correct record, open an original, explain one review gate, download a service PDF and state who acts next. Record training completion in your team process; the platform does not automatically certify staff proficiency.

A useful team habit

Begin each day with My next actions. End each handoff with: current version, unresolved gap, next responsible person and due-date basis. Keep client-facing wording separate from private commercial and technical notes.

FALCON OPERATING GUIDE

Solve the common problems first.

Use the exact role, workspace and current record before changing anything.

A menu or sample is missing

Confirm the assigned role and company. Some roles deliberately cannot see finance, internal cost or unapproved technical records. Start from your role’s guided tour. A missing menu is not automatically a defect.

Demo login fails

Use the correct role-specific password supplied by the owner. Sessions last eight hours. Return to Demo access after expiry; repeated invalid attempts are rate-limited. Do not use your personal ChatGPT password in the demo form.

Live workspace access is denied

Ask Falcon to confirm your membership email, Active status, role, company scope and expiry. Sign in with the exact ChatGPT account email assigned to that membership.

AI generation is blocked

Check account type, verified originals/source excerpts, consent, enabled route, expiry and available allowance. If a request has an uncertain provider outcome, the allowance may remain held; the owner must reconcile it before retrying.

An earlier review is no longer current

Open the current record and compare facts, sources, hashes and revisions with the reviewed snapshot. Prepare a new current draft/brief and repeat the required review. Do not copy an old approval forward.

PDF preview or download fails

Retry from the sample library or the current record. Check network/file permissions. Keep the file’s draft/sample status visible. Escalate with role, workspace, record title, attempted action and time; exclude passwords and keys.

FALCON OPERATING GUIDE

Understand the internal pilot boundary.

A controlled staff launch is different from unrestricted client reliance.

Available for exploration

Role-specific demos, fictional workflows, guided tours, twenty sample reports, PDF/Word downloads and live factual preparation for authorised production users. Demo-role flows and report downloads passed isolated integration checks; this is not proof of every live client process.

Still requires Falcon evidence

Verify client originals, current applicable law, methodology, calculations, privacy arrangements, recovery, incident handling and official filing handoff. Interpretation and AI challenge routes remain subject to evaluation and owner activation.

External systems remain separate

No direct Coretax/PJAP submission, no validated DJP XML export, no bank transfer/payment collection and no invitation-email delivery are established by the current pilot. Use authorised external channels and record supporting evidence.

Recommended rollout

First, orient staff in role demos. Second, invite named internal testers with scoped access. Third, run reviewed synthetic model trials. Fourth, complete readiness controls and a bounded client pilot before broader delivery. These are operating recommendations, not automatically completed app states.

Guide maintenance

Edition 2.0, prepared 4 October 2026 against the published feature set including the six intelligence upgrades. Live permissions, AI policy and source currency can change. Check the application before use; update this handbook after material workflow changes.

QUICK ACCESS

Your next step is one click away.

Use the guide as a map. The application determines your actual access.

Falcon intelligence & delivery

https://pajak365.app/intelligence
Research, document reading, workpapers, knowledge and measurements.

Demo access

https://pajak365.app/demo-access
Role-specific passwords from the owner.

Guided scenarios

https://pajak365.app/demo-scenarios
Follow the tour for your role.

Sample report library

https://pajak365.app/sample-reports
Twenty service reports and full downloads.

Named staff sign-in

https://pajak365.app/login
Use your own authorised ChatGPT account.

AI evaluation register

https://pajak365.app/ai-evaluations
Synthetic cases, frozen criteria and review.

Launch readiness

https://pajak365.app/launch-readiness
Preserve evidence before expanding the pilot.

Start from the participant guide
Scan this QR or open pajak365.app/demo-guide.
No password or secret is embedded in this handbook.