

# Viindoo

EBOOK - QUICK START GUIDE



## QUICK START GUIDE WITH **SUPPLY CHAIN MANAGEMENT IN VIINDOO**

# TABLE OF CONTENTS

<b>INTRODUCTION</b>	3
<b>GETTING STARTED WITH VIINDOO</b>	4
<b>SYSTEM INSTALLATION</b>	5
<b>INSTALL THE RIGHT APPLICATIONS FOR YOUR BUSINESS OPERATIONS</b>	7
<b>USE VIINDOO ON MOBILE DEVICES</b>	8
<b>SYSTEM MANAGEMENT</b>	9
Declare company information	9
Create and manage software users	9
<b>LOG IN AND CONFIGURE PERSONAL ACCOUNT</b>	12
Log in to Viindoo software	12
Change password	13
<i>Change new password</i>	13
<i>Reset password</i>	13
<b>PREPARE INITIAL DATA</b>	15
Products list	15
<i>Create a product category</i>	15
<i>Create a Unit of Measure (UoM)</i>	16
<i>Create a new product</i>	17
Inventory opening balance	18
Customers/Vendors list	18
<b>SUPPLY CHAIN AND INVOICING MANAGEMENT IN VIINDOO</b>	19
<b>PURCHASE MANAGEMENT</b>	20
Create a purchase agreement	21
<i>Activate the Purchase Agreements feature</i>	21
<i>Create a blanket order</i>	22
<i>Create a call for tender</i>	24
Create a purchase order	26
Contact vendor	27
Confirm a purchase order	28
Payment	28
Tracking products delivery	28



# TABLE OF CONTENTS

<b>SALES MANAGEMENT</b>	29
Create Pricelists for customers	29
<i>Activate the Pricelists feature.</i>	29
<i>Create a pricelist for each customer.</i>	30
Quoting and closing orders with customers	31
<i>Create a new quotation.</i>	31
<i>Confirming a sales order.</i>	32
<i>Applying discounts to a sales order.</i>	33
Record payment	34
Track the delivery and issue invoice	34
<i>Track the delivery.</i>	34
<i>Tracking invoicing status.</i>	34
<b>INVENTORY MANAGEMENT</b>	35
Process incoming products	36
<i>Receive products in one order.</i>	36
<i>Receive products in multiple orders.</i>	37
Deliver products	38
<i>Delivery all products in one order.</i>	38
<i>Delivery products in multiple orders.</i>	39
Inventory adjustment	39
<b>LIABILITIES ACCOUNTING MANAGEMENT</b>	40
Create and issue invoices	40
<i>Customer invoices</i>	40
<i>Vendor Bills.</i>	45
Register Payment	47
Accounting liabilities management	48
<b>VISUAL REPORTS OF BUSINESS PERFORMANCE</b>	49
Commonly used reports	49
<i>Purchase report</i>	49
<i>Sales report.</i>	50
<i>Inventory report</i>	51
<i>Invoicing report.</i>	52
Build your dashboards	53
<b>GUIDELINES CONTACT SUPPORT</b>	55

# INTRODUCTION

Viindoo introduces to readers the Quick Start Guide intending to help businesses in identifying where to start, what to do, and how to quickly implement the Supply Chain Management in the Viindoo Business Management software for their businesses.

Depending on the type of business and practical needs, each business will have its own specific processes. This document provides instructions on how to quickly set up and implement from the Purchase, Inventory to Sales and Invoicing management for businesses using the Viindoo software.



Viindoo hopes that the knowledge and instructions shared in this Ebook will help businesses to define and be confident in implementing the Viindoo Software by themselves.



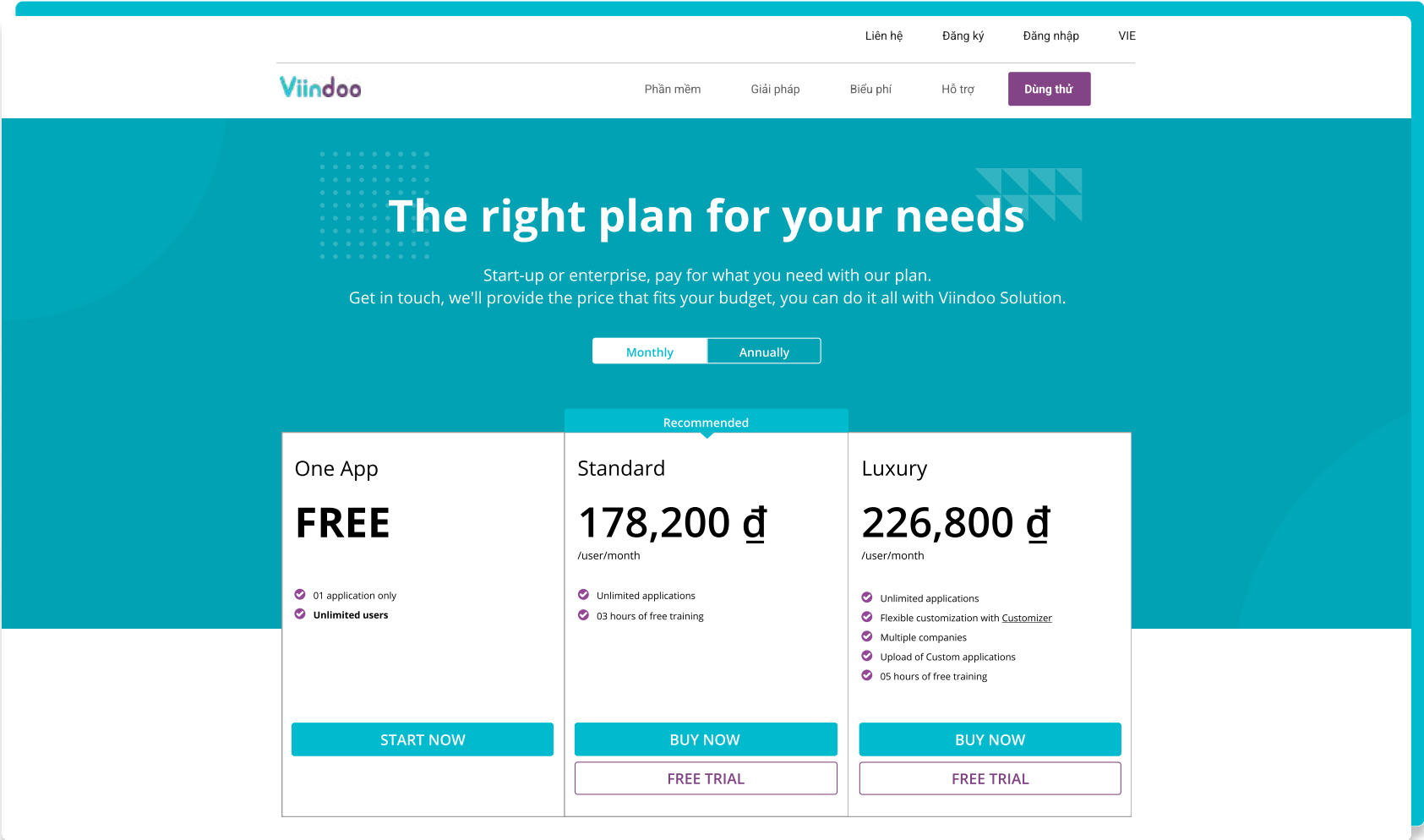


# GETTING STARTED WITH VIINDOO



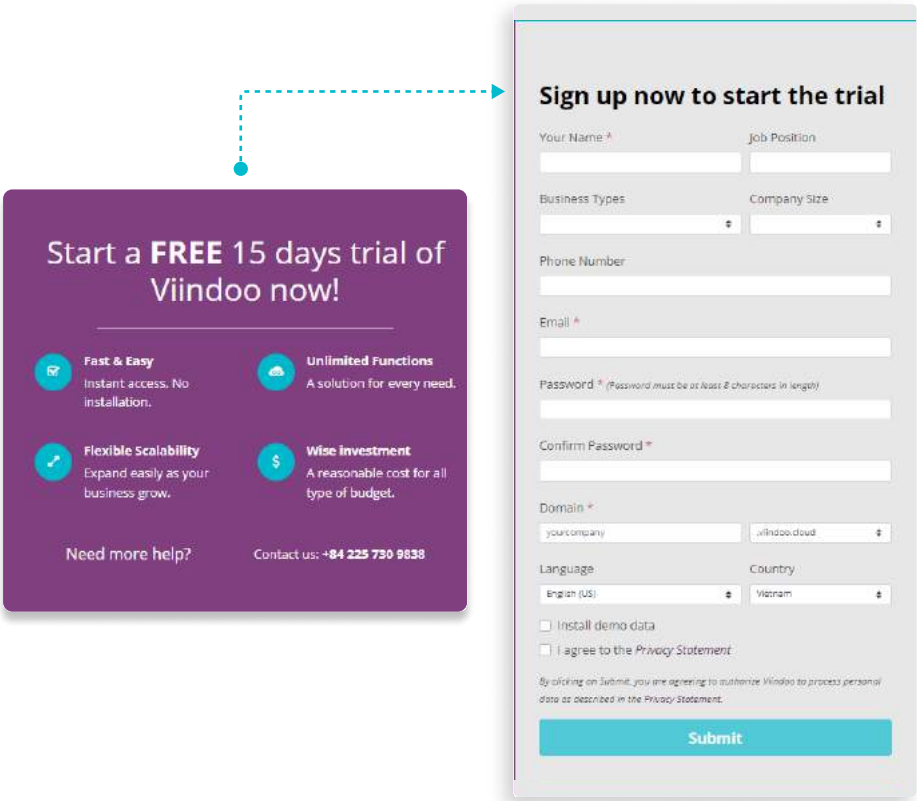
# SYSTEM INSTALLATION

Access the website <https://viindoo.com/pricing> of Viindoo to create an official system for your business.



Click on **"Buy Now"** to initiate the official system setup process. You will be redirected to the payment interface to complete the transaction. Alternatively, you can choose "Free Trial" to input the number of accounts and select the application to create a trial system and experience it for 15 days. Viindoo provides businesses with a free second-level domain.

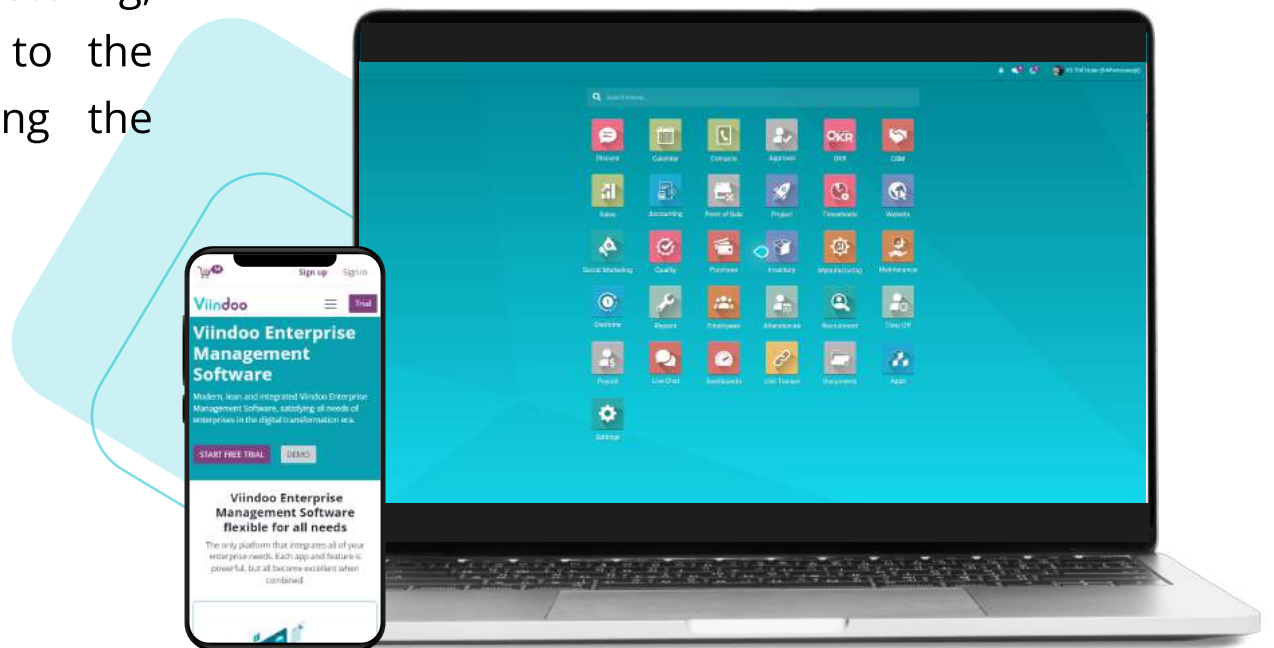
➡ e.g: your-company.viindoo.cloud.



- ➡ See details at:
- Steps to create Viindoo Instance.



After successfully registering, you will be directed to the interface to start using the software.



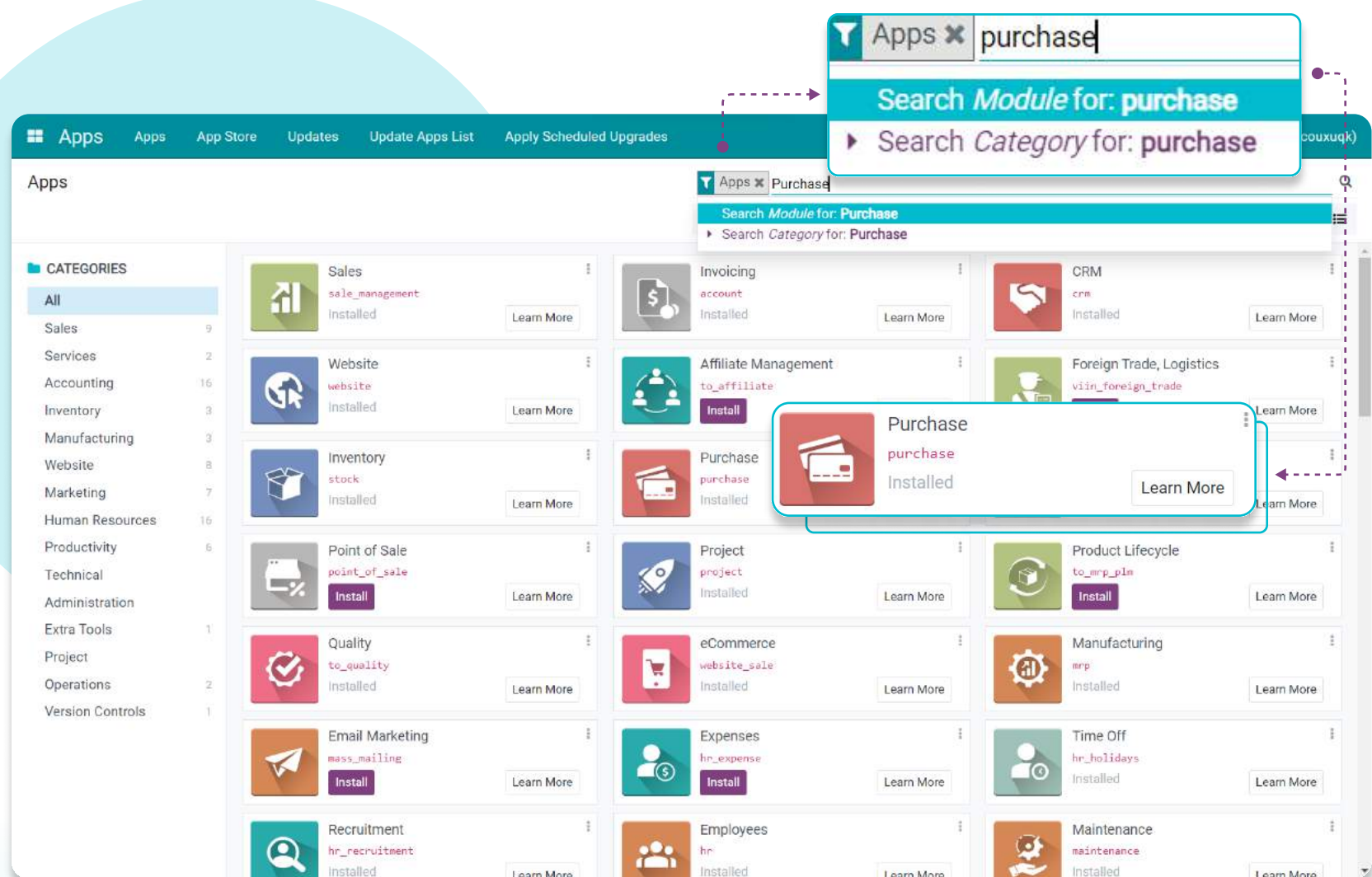
### ❗ Note

Due to information security and to avoid having to import data multiple times, don't forget to:

- Import initial data such as list of products, list of customers/vendors, opening stocks balance, etc. into the official system.
- For specific business operations, perform them on the trial system before executing them on the official system to anticipate any risks that may arise during the software usage.

## INSTALL THE RIGHT APPLICATIONS FOR YOUR BUSINESS OPERATIONS

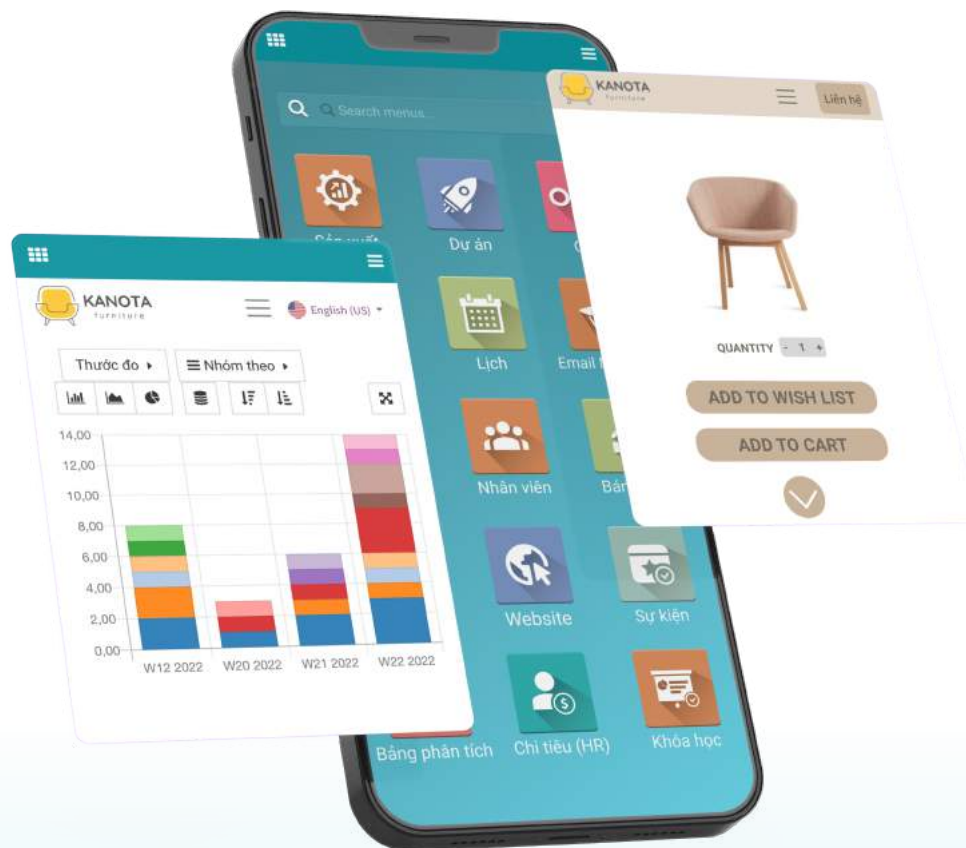
Depending on the needs and purposes of your business, access the Apps and use keywords to search for apps to install.



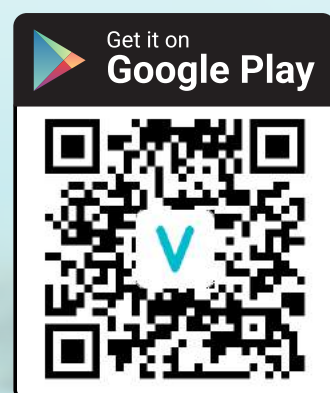


## USE VIINDOO ON MOBILES DEVICES

You can easily access the Viindoo instance of your business anytime and from anywhere with the Viindoo app on your smartphone or other mobile devices such as a tablet. Viindoo supports apps on both iOS and Android operating systems.



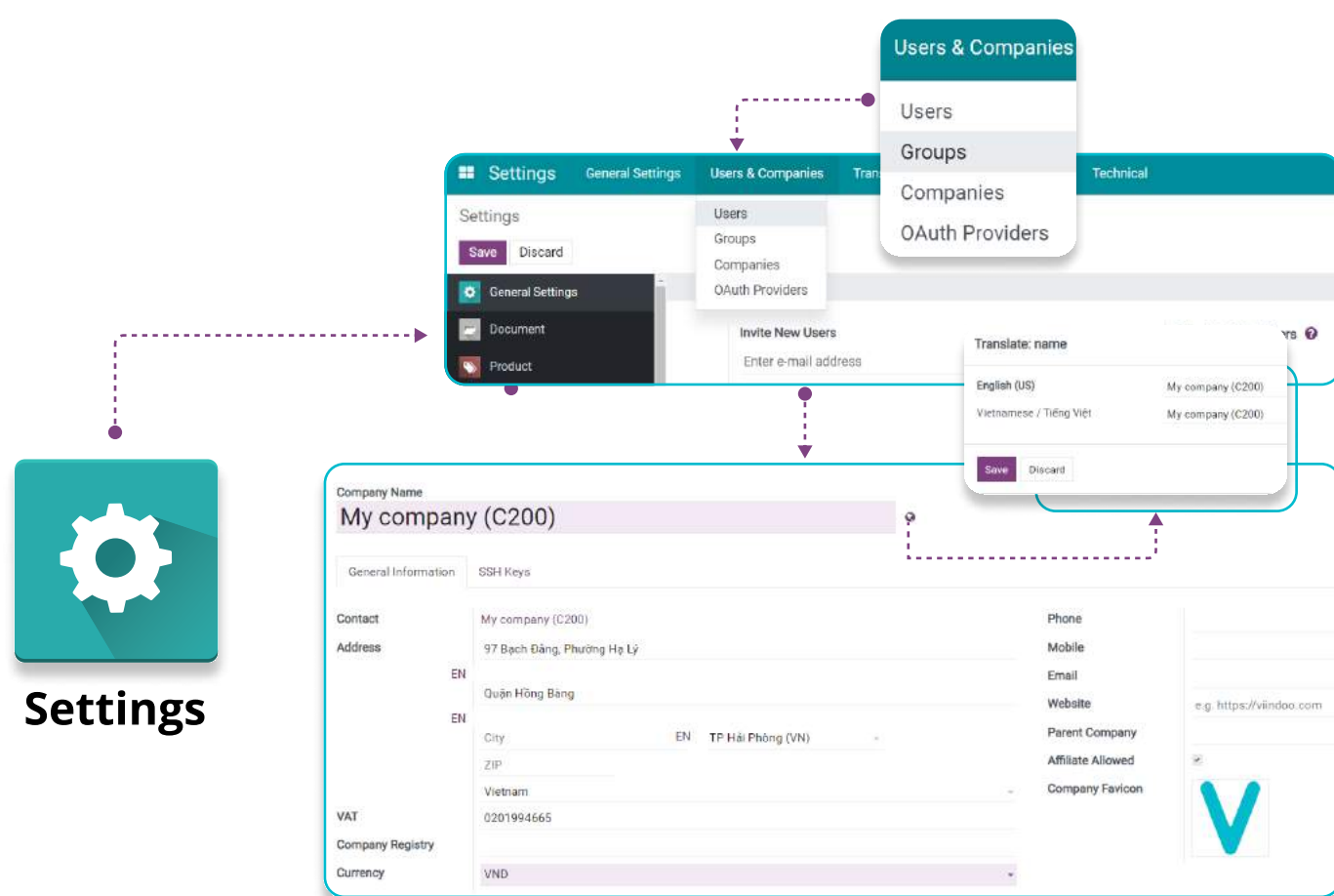
Go to the CH Play app on your Android device or the Apps Store on iPhone, search for the Viindoo app to install.



### DECLARE COMPANY INFORMATION

Company information will be used in quotations and invoices that your businesses send to customers.

To set up this information, navigate to **Settings** ▶ **Users & Companies** ▶ **Companies**, click on your company and add your business registration information:



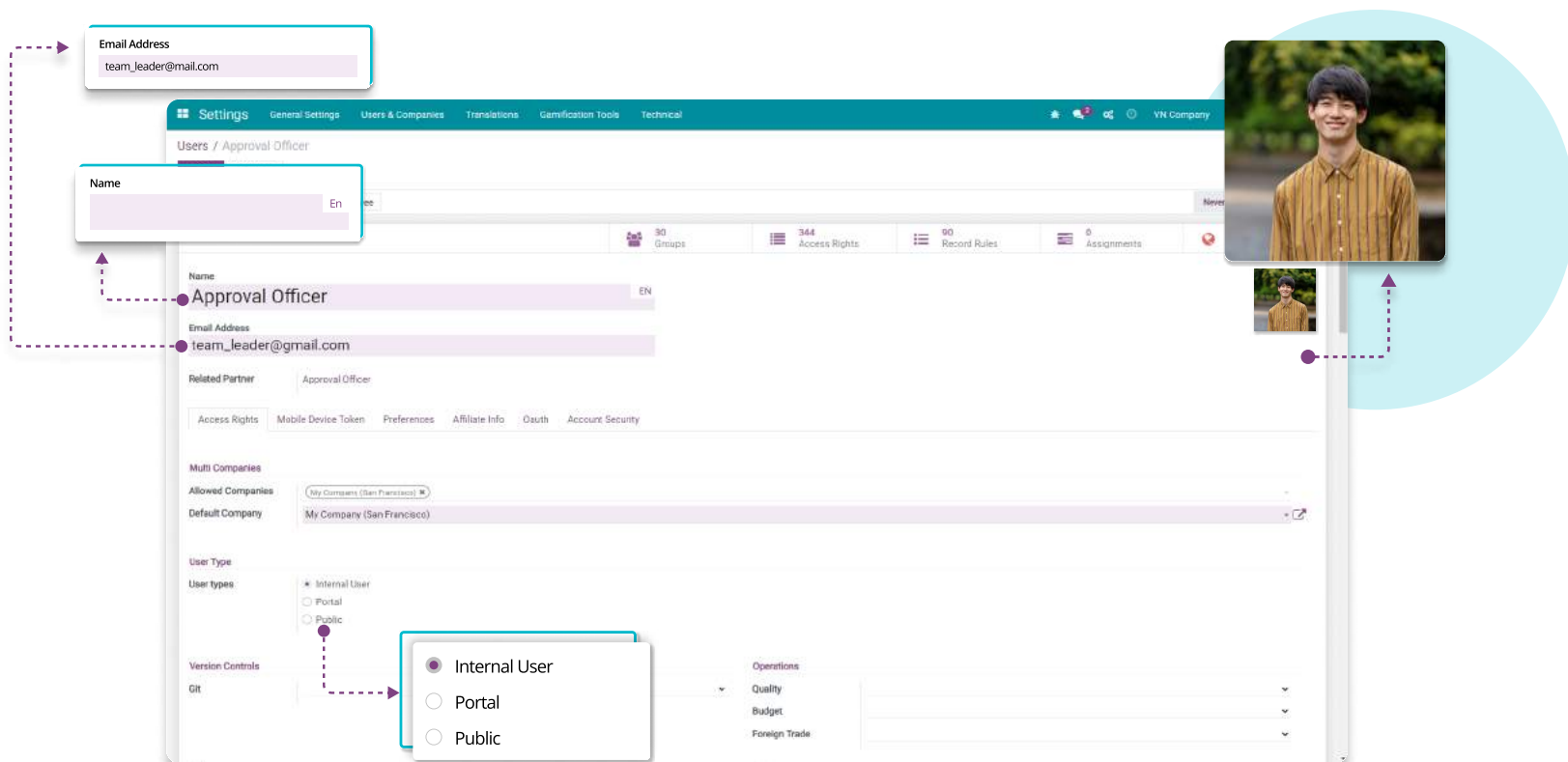
To display your company information in another language, you can click on the icon 🌐 or **EN** to enter the translated text for each information field.

### CREATE AND MANAGE SOFTWARE USERS

Viindoo enterprise management software provides a feature to support administrators in creating accounts for users according to each role to participate in performing business operations and granting access rights according to their roles and access rights.

To create a new account for a system user, you navigate to **Settings** ▶ **Users & Companies** ▶ **Users** and select **Create**.





From here, you need to add user information, including:

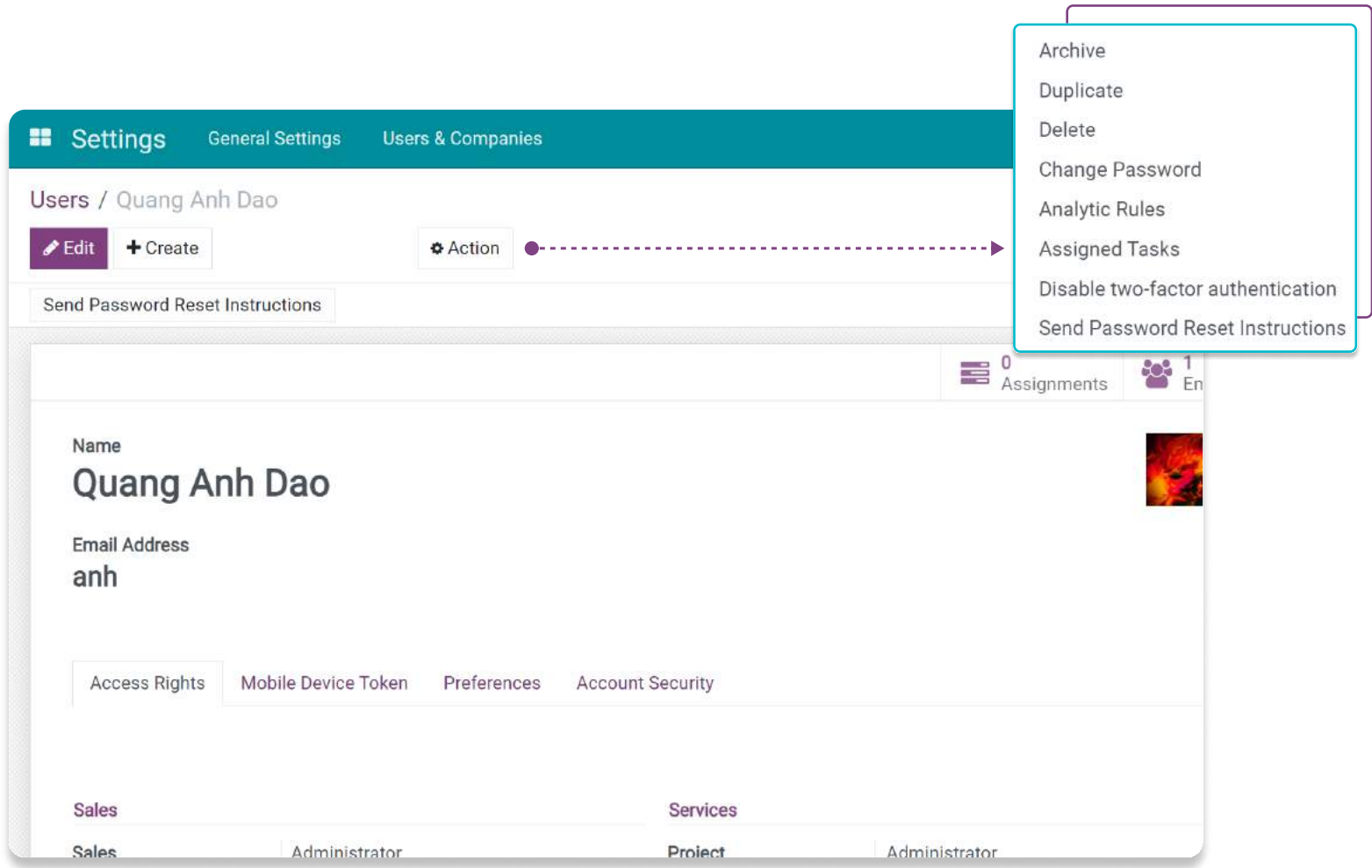
- *Name*: Add user's full name to facilitate the communication between users on the software.
- *Email address*: User account login name.
- *Avatar*: You click the pencil icon on the image in the right of the screen to add a new avatar for the user.
- *User Type*: Use the system default.

On the **Access Rights** tab, you should keep the default access right that the software suggested: Administrator in all apps. This will help all users to visualize the operation and data flow in the system, thereby smoothly and effectively coordinate with each other.

In case your business is organized by departments, specialized employees and needs to manage each employee's task, you can refer to Viindoo's access rights suggestions:

Partition  Job position	Document Management		Purchase Management		Sales Management		Inventory Management		Accounting	
	Officer	Admin	User	Admin	User: All Document	Admin	User	Admin	Billing	Admin
Director	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Purchase Management	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Purchasing Officer	<input checked="" type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sales Management	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sales Person	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Warehouse Manager	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Warehouse Staff	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Accountant	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>

Next, you need to set up a default password for each use by pressing **Action** ► **Change Password**.



Enter the default password for the account. Then, don't forget to ask the user to log in and [change to a personal password \(Page 13\)](#) for security reasons.

## LOG IN AND CONFIGURE PERSONAL ACCOUNT

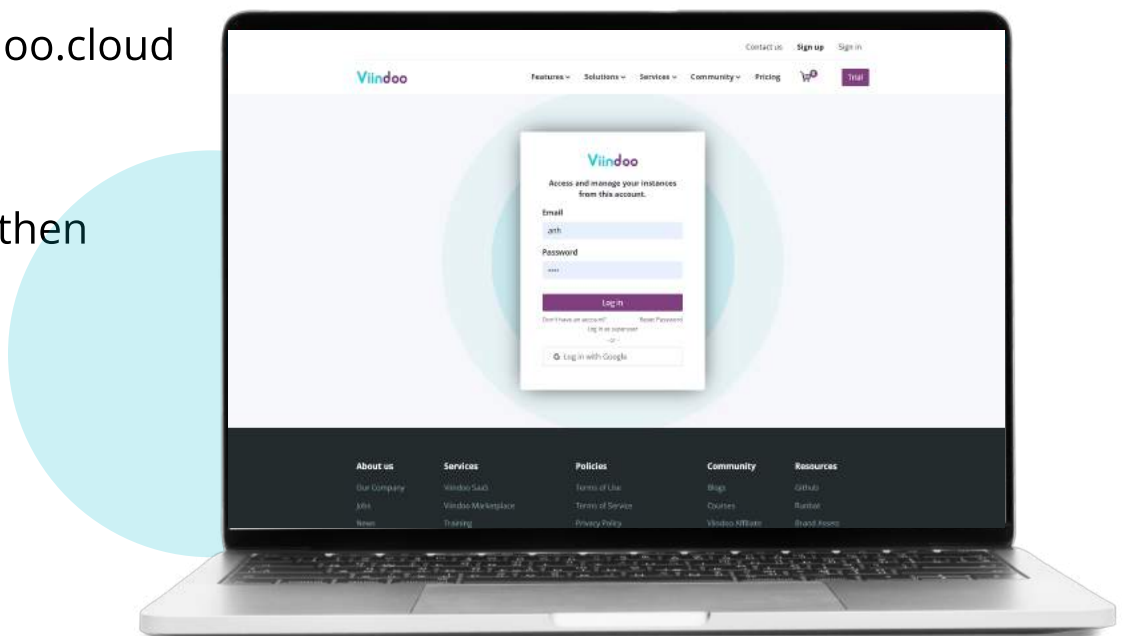
### LOG IN TO VIINDOO SOFTWARE

#### Log in on web browser

After receiving the account created with your personal email and password, open the web browser and go to the instance domain created previously.

➡ e.g: your-company.viindoo.cloud

Add your login information then press **Log in**.



#### Log in on your phone

Open the Viindoo app to enter the login information, including:

- *Your domain address:* Enter the Domain name created in the [Create a new instance](#) step. For example, yourcompany.viindoo.cloud
- *Your mail address:* Enter the email address of the user account that was created.
- *Password:* Enter the corresponding password.



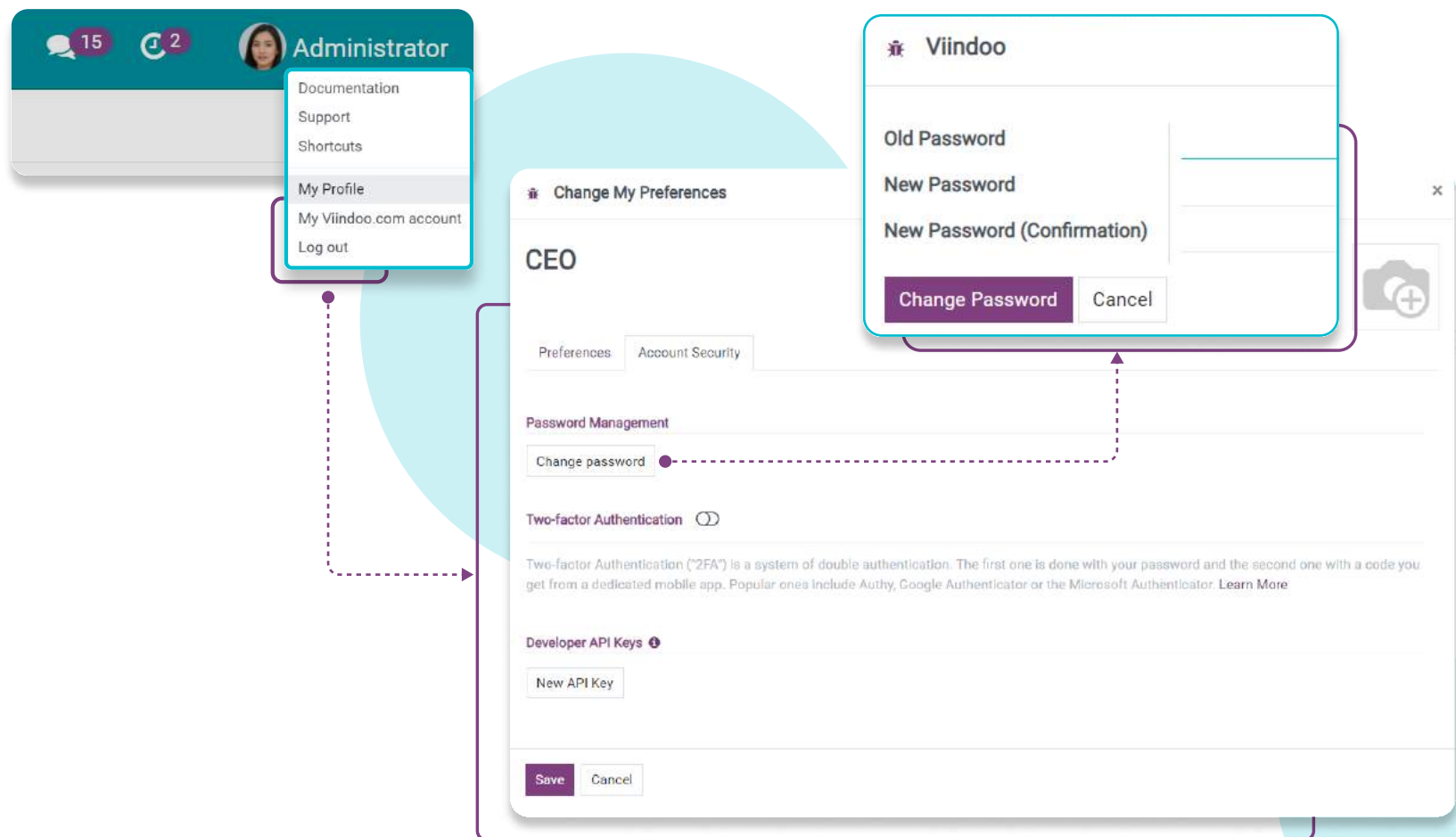
After successful login, you will be redirected to the Mobile view. Here, you can receive notifications, reply to emails, or do the same thing as in a web browser.



## CHANGE PASSWORD

### Change new password

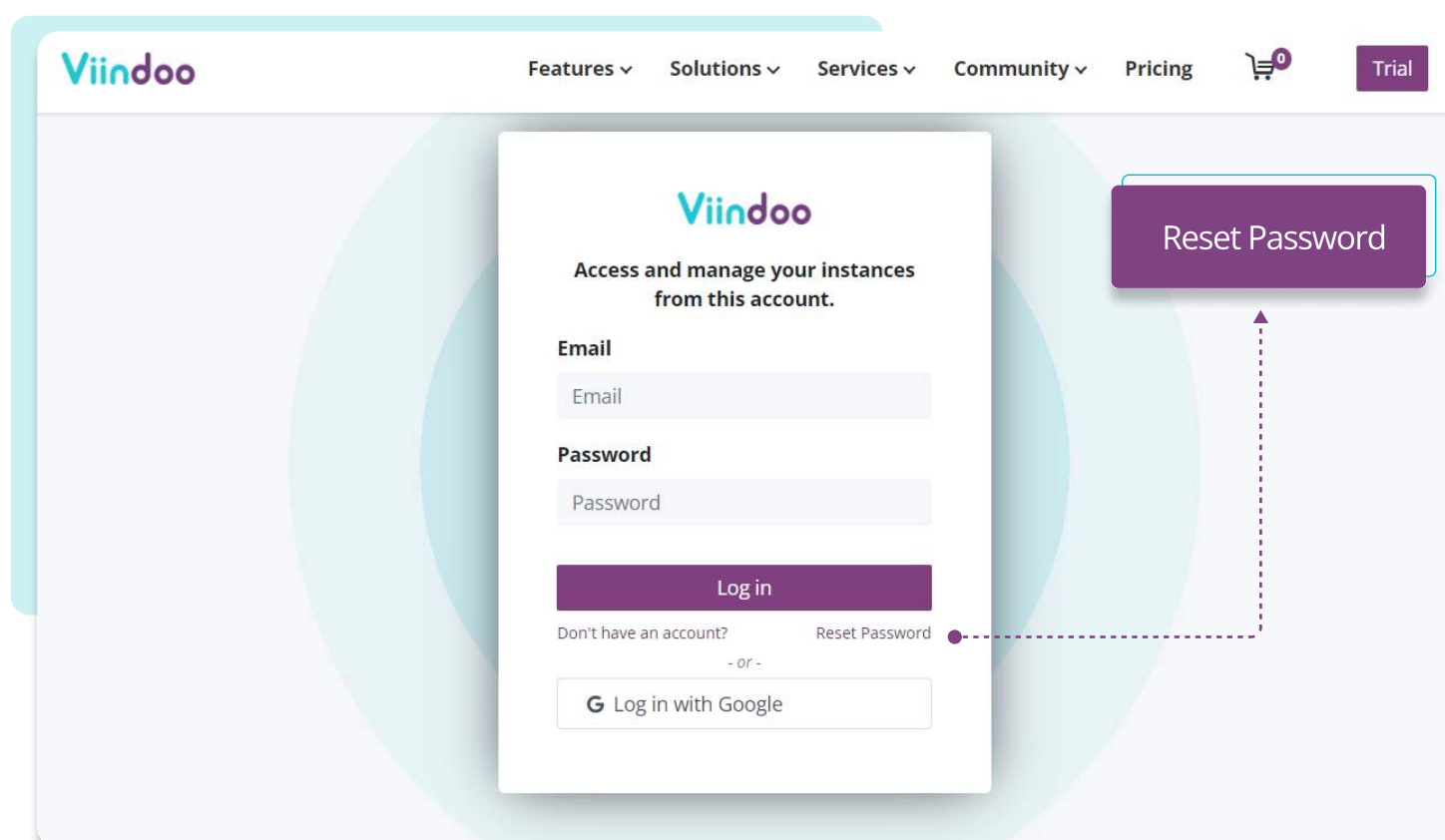
To change your password, navigate to **My Profile**, select **Account Security** ► **Change Password**:



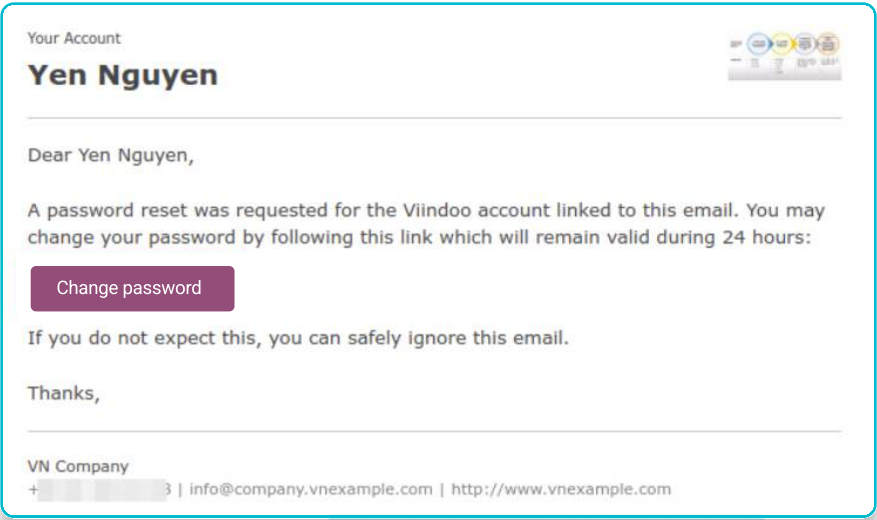
Enter the new password and press **Change Password** to complete.

### Reset password

If you forgot your password, follow these steps to reset your account password:  
Click **Reset Password** to follow the instructions:



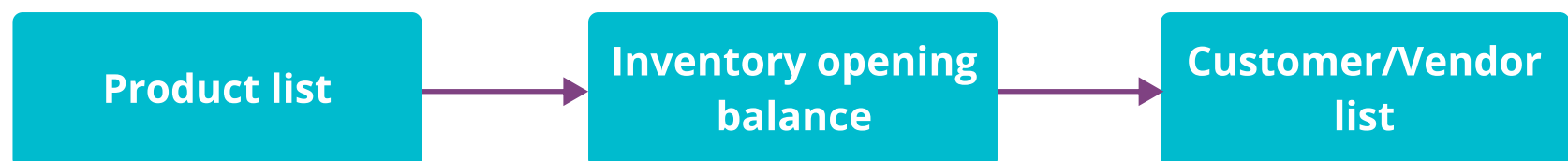
The system will send you an email with instructions to reset your password. Access your email account, press **Change password**, select a new one and **Confirm**.

A web form on the Viindoo website. The header includes the Viindoo logo and navigation links: Home, Shop, Events, Courses, Services, Pricing, Company, Docs, a plus icon, a shopping cart icon with "0", "Sign in", "English (US)", and a "Contact Us" button. The form fields are: "Your Email" (with a masked input), "Your Name" (with "Yen Nguyen" and "Example@gmail.com" as examples), "Password" (empty input), and "Confirm Password" (empty input). A purple "Confirm" button is at the bottom.

## PREPARE INITIAL DATA

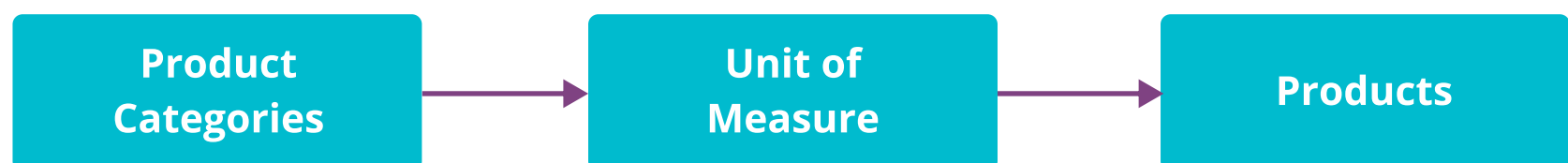
With the Viindoo software, you will have to add the products list, contact information of customers, vendors, etc. only once. This information will then be used in any operation and by any departments in the company, from purchase, and sales to inventory management, accounting, etc.

Initial data to be prepared including:



## PRODUCTS LIST

Products in Viindoo include all the products, services that your business manufactures, purchases, sells and all the expenses generated from daily operations (e.g: An office TV, Catering services, Car rental services, etc.). To manage a product, you need to configure the following information related to a product:



### Create a product category

Product categories are used to categorize products of your business into different groups. The product categories feature in Viindoo software is built in the hierarchy structure to help you plan and manage your products.

To create a product category, navigate to **Inventory** ► **Configuration** ► **Product categories** then press **Create**. Add all the information of a product such as: Product name, Parent Category, Logistics, and Inventory valuation method.

The screenshot displays the 'Product Categories' configuration form in the Viindoo software. The top navigation bar includes 'Inventory', 'Overview', 'Operations', 'Products', 'Reporting', and 'Configuration'. The user is logged in as 'Administrator'. The breadcrumb trail shows 'Product Categories / All / Saleable'. The form includes a 'Save' button and a 'Discard' button. The main form fields are: 'Category' (set to 'Physics books'), 'Parent Category' (set to 'All / Saleable'), 'Logistics' (set to 'Force Removal Strategy'), and 'Inventory Valuation' (set to 'Specific Identification' and 'Automated').



Press on the **Products** button on the top right corner of the interface to view the products list of a category. Once done, press **Save**.

## ❗ Note

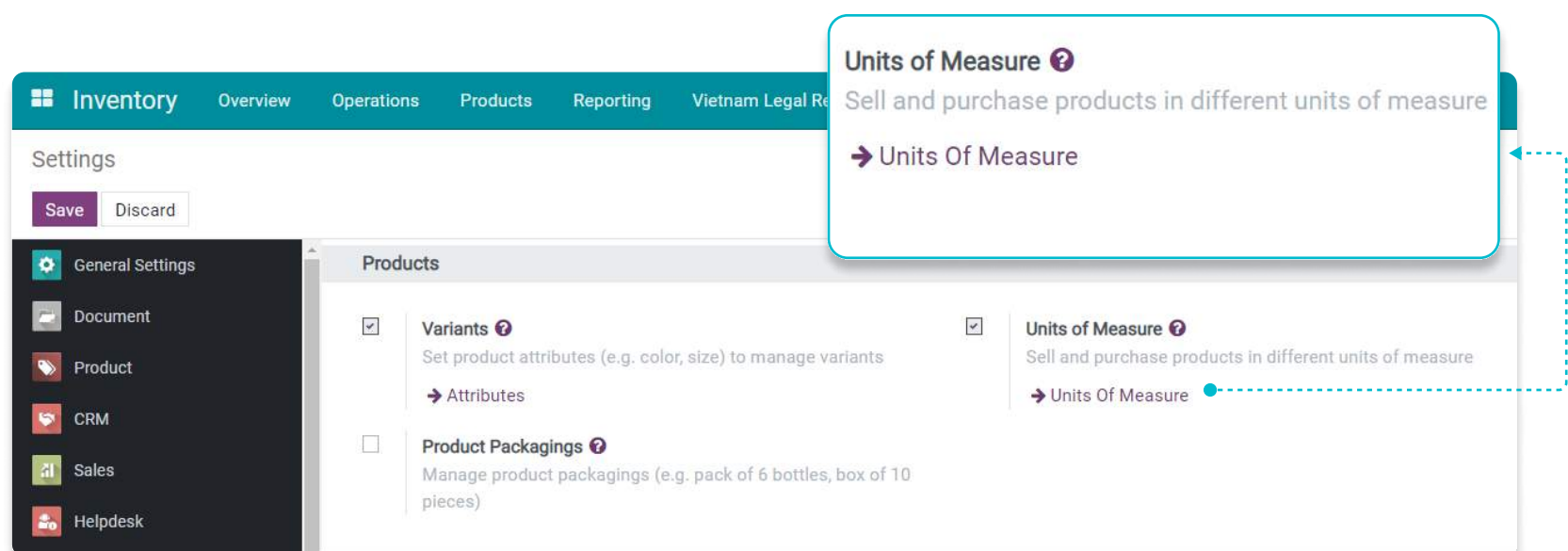
To know the meaning and usage of each information field on Viindoo

- Point to each field to read the definition or click **?** to view the corresponding video and usage instructions.
- Fields marked in purple are mandatory. It's necessary to add information to these fields in order to have a feature work properly.

## Create a Unit of Measure (UoM)

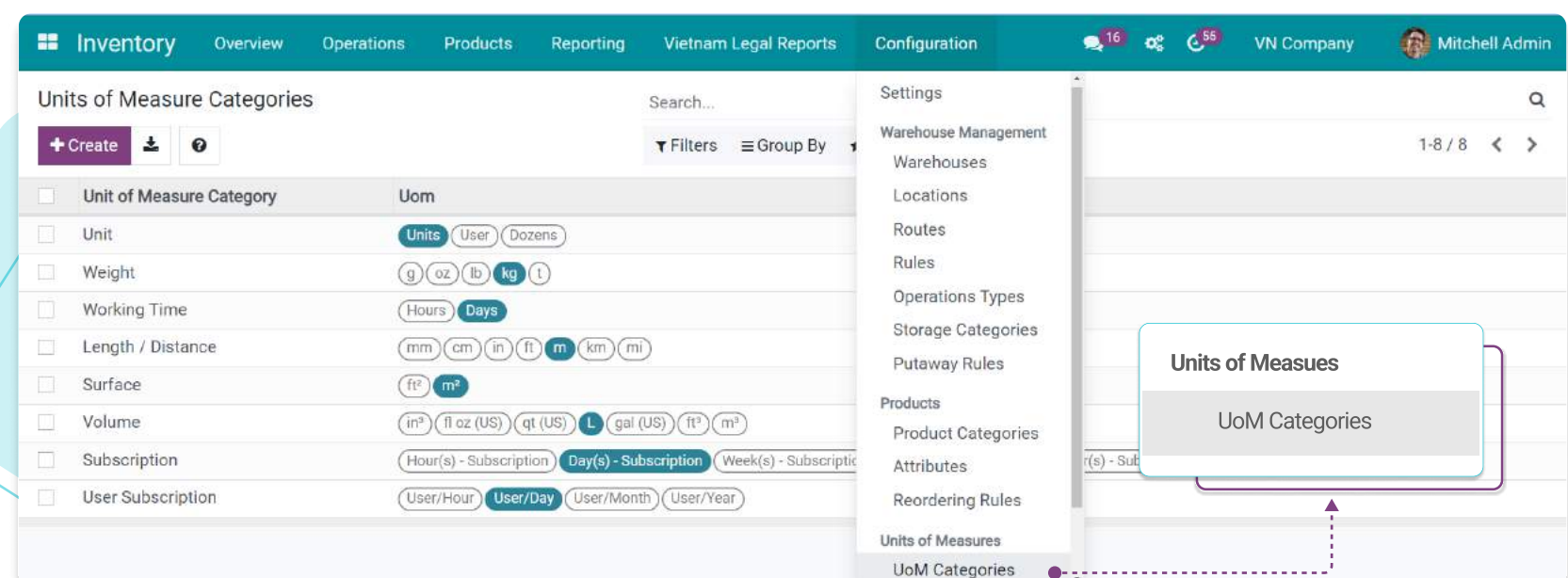
### *Enable Units of Measure feature*

Navigate to **Inventory** ▶ **Configuration** ▶ **Settings** to enable the *Units of Measure feature*. Now you will see options to choose a unit of measure where applicable (e.g. stock transfer from view, sales order, purchase order, etc.).



### *Create new Units of Measure (UoM)*

Navigate to **Inventory** ▶ **Configuration** ▶ **UoM Categories**, select one of the available categories to edit.



At the **Units of Measure** tab, click **Add a line** to start creating a new UoM according to your needs.

sure 1.00000 0.01000

Unit of Measure Category Unit EN

Name Concatenation

Units of Measure

Unit of Measure	Type	Ratio	Active	Rounding Precision
Units	Reference Unit of Measure for this category	1.00000	<input checked="" type="checkbox"/>	0.01000
User	Bigger than the reference Unit of Measure	1.00000	<input checked="" type="checkbox"/>	1.00000
Dozens	Bigger than the reference Unit of Measure	12.00000	<input checked="" type="checkbox"/>	0.01000
EN	Smaller than the reference Unit of Measure	1.00000	<input checked="" type="checkbox"/>	0.01000

Add a line

➔ See details at:

- *Activate different units of measure.*

### Create a new product

In Viindoo, you can create products in many modules such as Inventory, Sales, Purchase, Accounting & Finance, etc. but only the admin of those modules can create products. To create a new product, navigate to the **Products** menu on these apps then press **Create**.

From here, add a picture (if applicable) and comprehensive information about your product. Also, define whether this product can be purchased or sold. This information decides the accessibility to the product from the Purchase or Sales app later on.

Products / [FURN\_0269] Office chair

Product Name: Office chair

Product Type: Storable Product

Sales Price: 1,250,000.00 g (~ 1,375,000 g incl. Taxes)

Customer Taxes: Value Added Tax (VAT) 10%

Cost: 800,000.00 g

Product Category: All / Saleable

Internal Reference: FURN\_0269

Barcode:

On hand: 0.00 Units

Acoustic Bloc Screens [FURN\_6666] Price: 295.00 g On hand: 0.00 Units

Cable Management Box [FURN\_5555] Price: 100.00 g On hand: 0.00 Units

Corner Desk Left Sit [FURN\_1118] Price: 85.00 g On hand: 0.00 Units

Desk Combination [FURN\_7800] Price: 450.00 g On hand: 0.00 Units

Car [RENT003] Price: 1.00 g On hand: 0.00 Units

Corner Desk Right Sit [E-COM06] Price: 147.00 g On hand: 0.00 Units

Desk Organizer [FURN\_0001] Price: 5.10 g On hand: 0.00 Units

Conference Chair 2 Variants Price: 33.00 g On hand: 0.00 Units

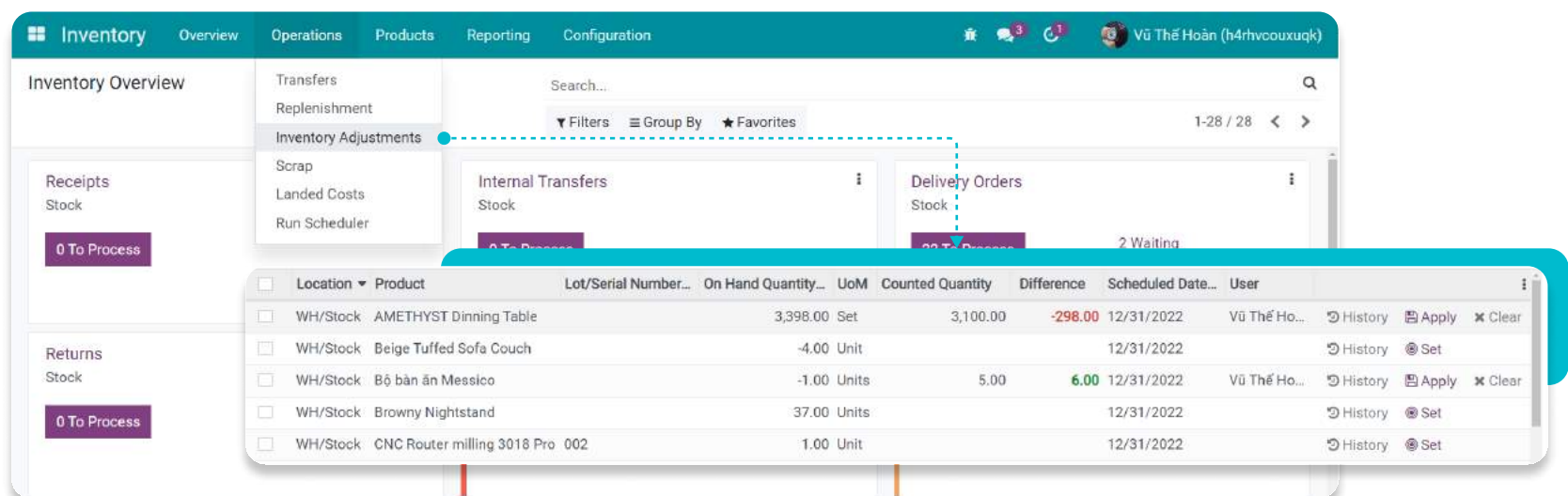
Customizable Desk 5 Variants Price: 750.00 g On hand: 0.00 Units

Desk Pad [FURN\_0002] Price: 1.98 g On hand: 0.00 Units

## INVENTORY OPENING BALANCE

Inventory opening balance is the quantity of products available at the moment your business decides to officially use Viindoo in daily operations.

To add the inventory opening balance, navigate to **Inventory** ▸ **Operations** ▸ **Inventory Adjustments** ▸ **Create**.



Add the following information:

- *Location*: The current storage location of this product.
- *Product*: Select the product of choice to edit the inventory opening balance.
- *Counted Quantity*: The quantity of products counted at the import opening balance moment to the system.

Once all the information is added, press **Apply** to save the inventory data.

## CUSTOMERS/VENDORS LIST

To create a new customer/vendor contact, navigate to **Contacts** app and press **Create**. On the contact form, define whether this contact is an *Individual* or a *Company*, then add the basic information such as name, address, phone number, date of birth/date of establishment, title, etc.



On the other hand, you can manage other general information, such as:

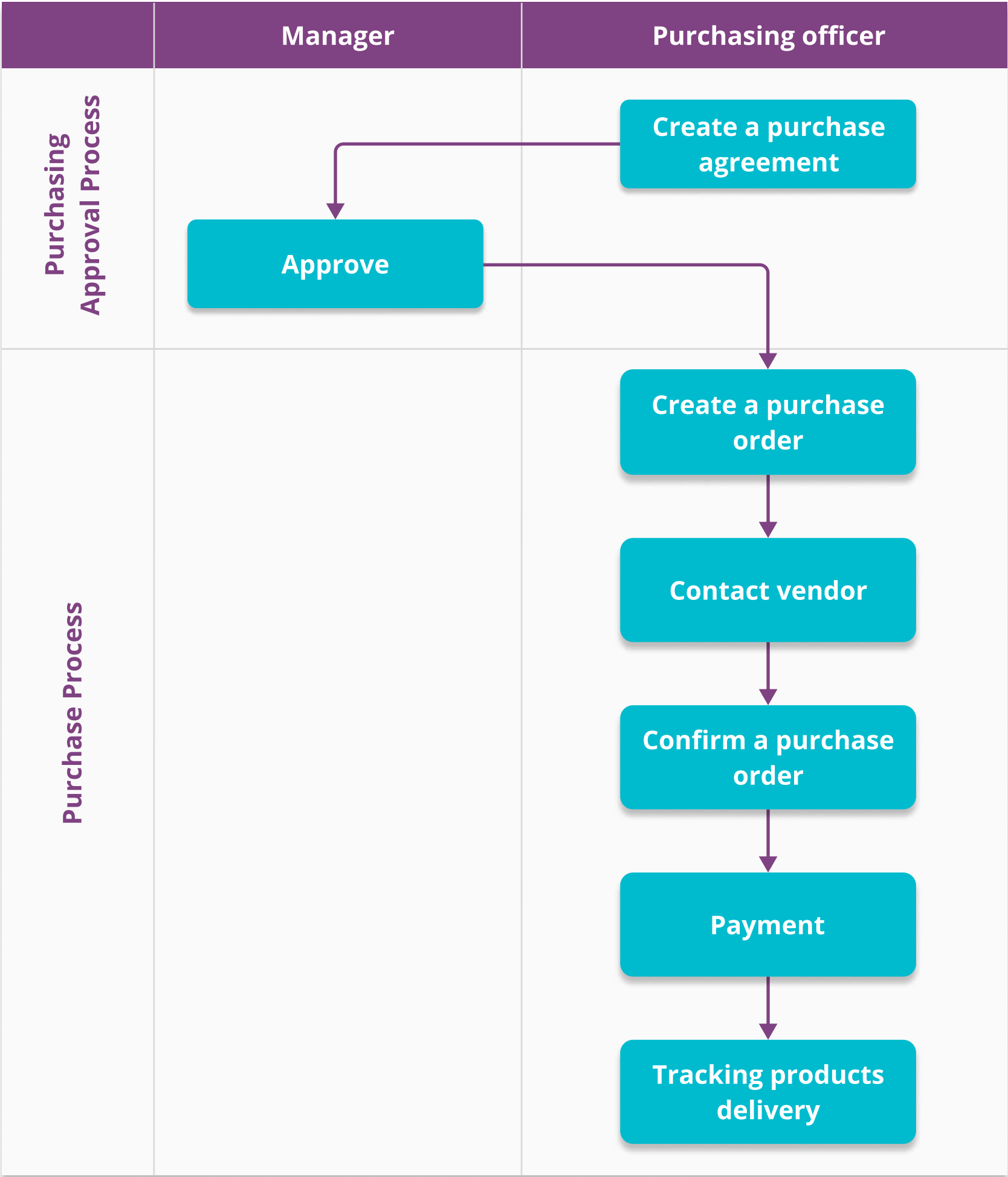
- *Contacts & Addresses*: Additional contacts of employees, invoicing address, shipping address, etc.
- *Sales & Purchase*: Commercial information of this contact.

Finally, press **Save** to finish creating a customer/vendor contact.





# SUPPLY CHAIN AND INVOICING MANAGEMENT IN VIINDOO



The above diagram describes the general procurement process of a business. However, this process might vary depending on each business structure and actual operations. In this eBook, Viindoo will show you how to perform the main steps of this procurement process, starting from *Create a purchase agreement* and ending with *Track products delivery*.

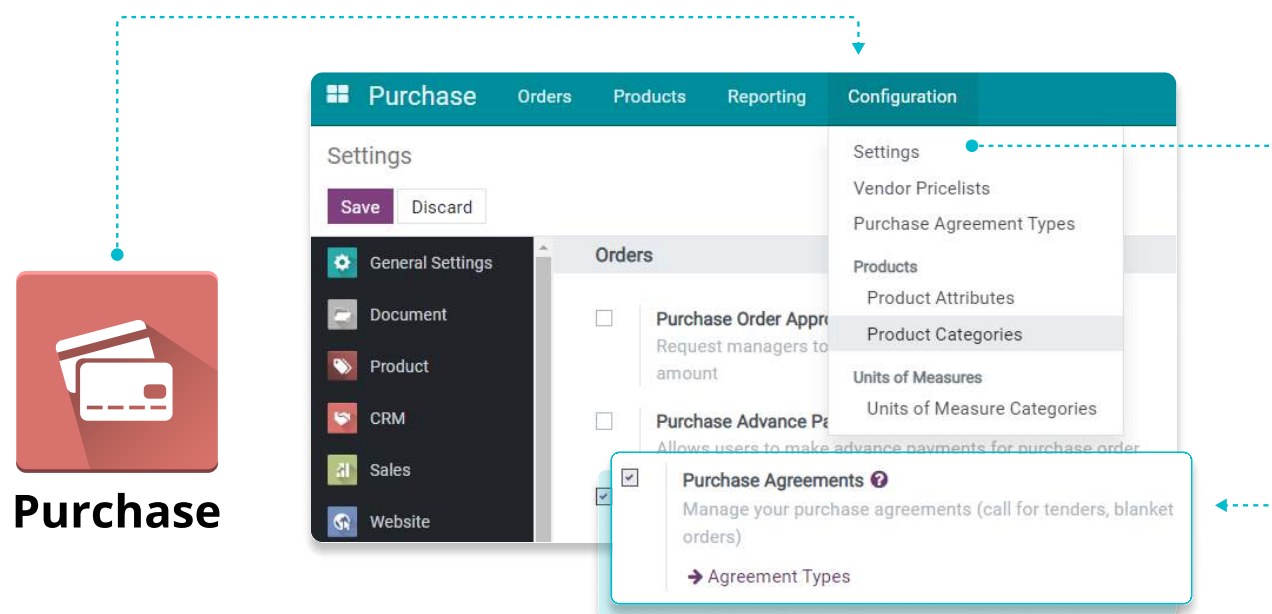


## CREATE A PURCHASE AGREEMENT

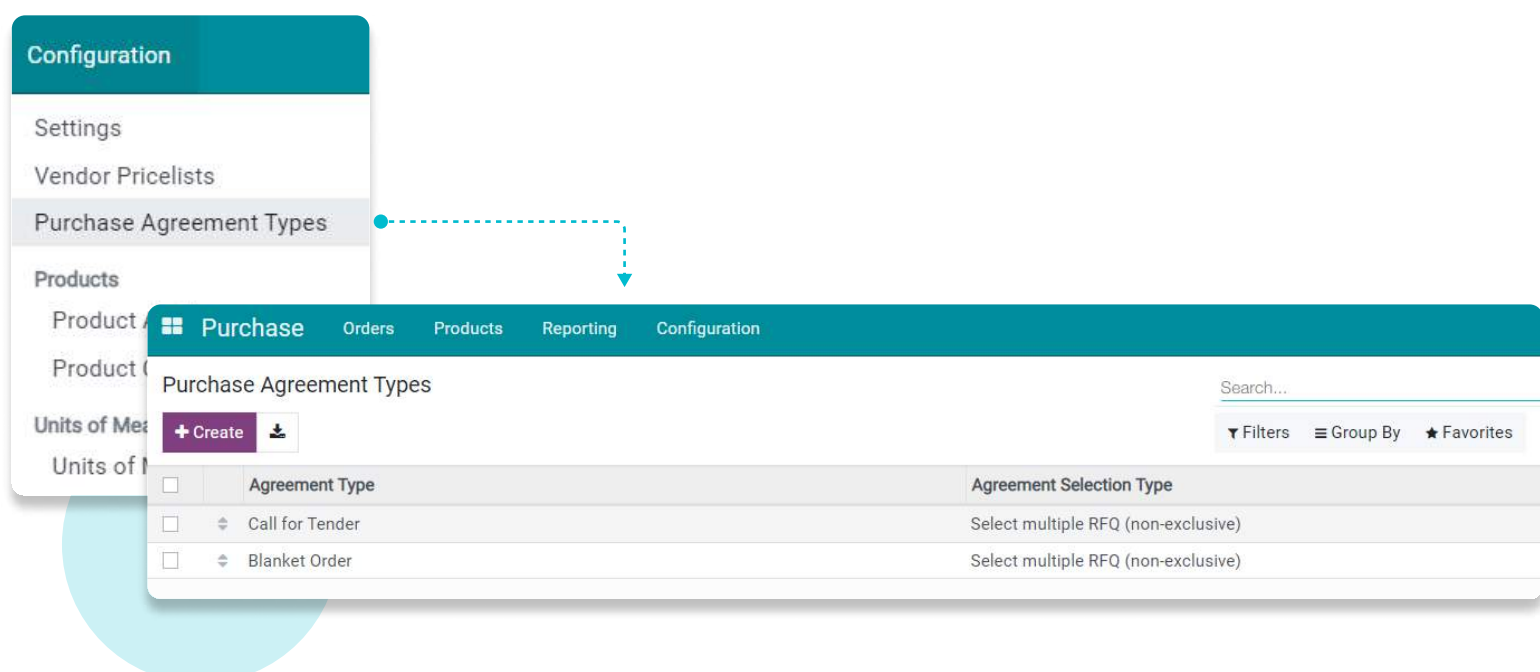
Viindoo software supports users with 2 popular purchase agreements: Call for Tender and Blanket Order. You should select the agreement that fits the procurement process of your business.

### Activate the Purchase Agreements feature

You navigate to **Purchase** ► **Configuration** ► **Settings**. Then, select **Purchase Agreements** and press **Save**.



Navigate to **Purchase** ► **Configuration** ► **Purchase Agreement Types**, you will see purchase agreement types.



By default, the software provides 2 Purchase agreement types: *Call for Tender* and *Blanket Order*.

➡ See details at:

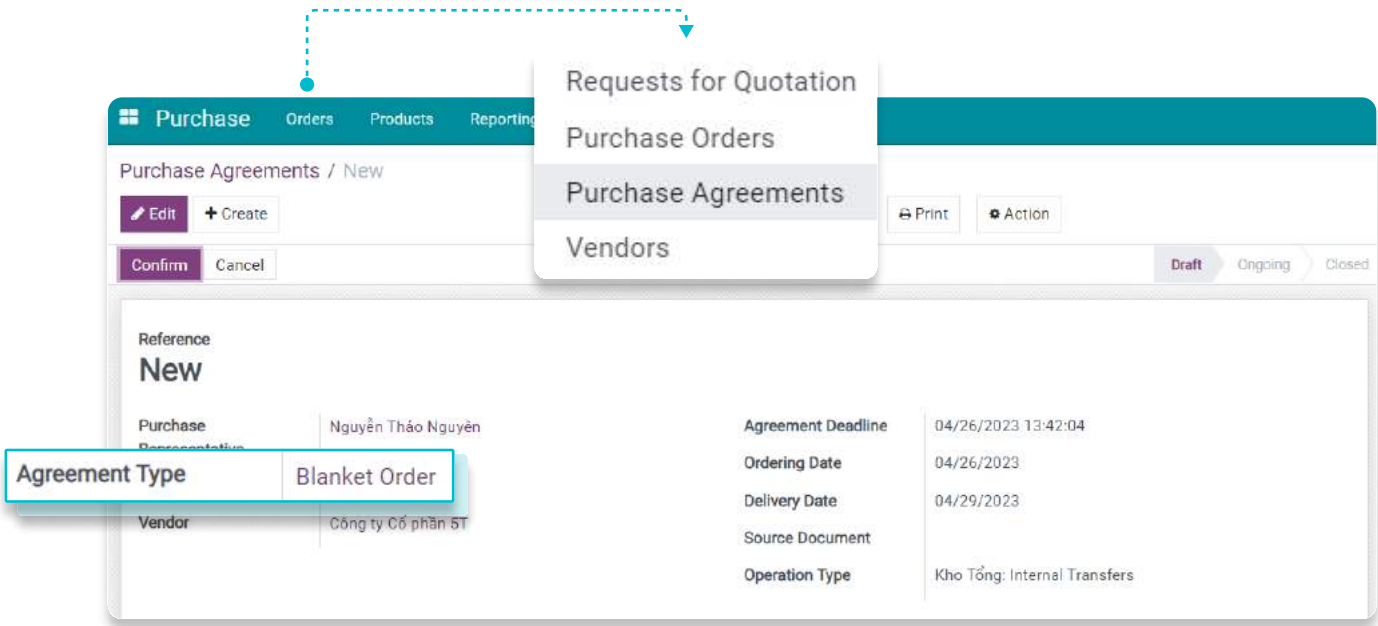
- [Configure Purchase agreement types.](#)

Create a blanket order

The blanket order is used when you sign a long-term contract but submit requests for quotation to the vendor and receive the products multiple times during the contract period. The process of a blanket order is shown in the following diagram:



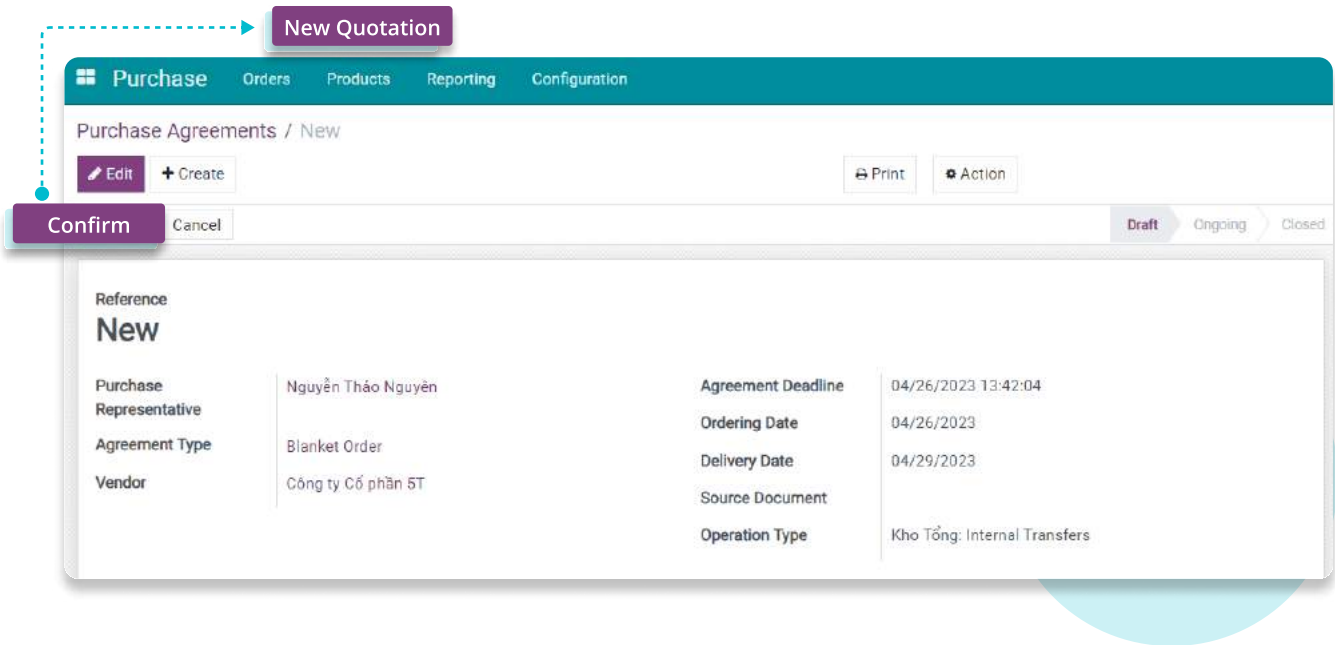
Navigate to **Purchase** ▸ **Orders** ▸ **Purchase Agreements** ▸ **Create** to create a Purchase agreement.



You fill in the information on this Purchase agreement, including:

- *Purchase Representative:* You enter the purchasing employee, the system automatically fills in the name of the creator of the Purchase agreements here.
- *Agreement Type:* You select *Blanket Order*.
- *Vendor:* Fill in vendor information.

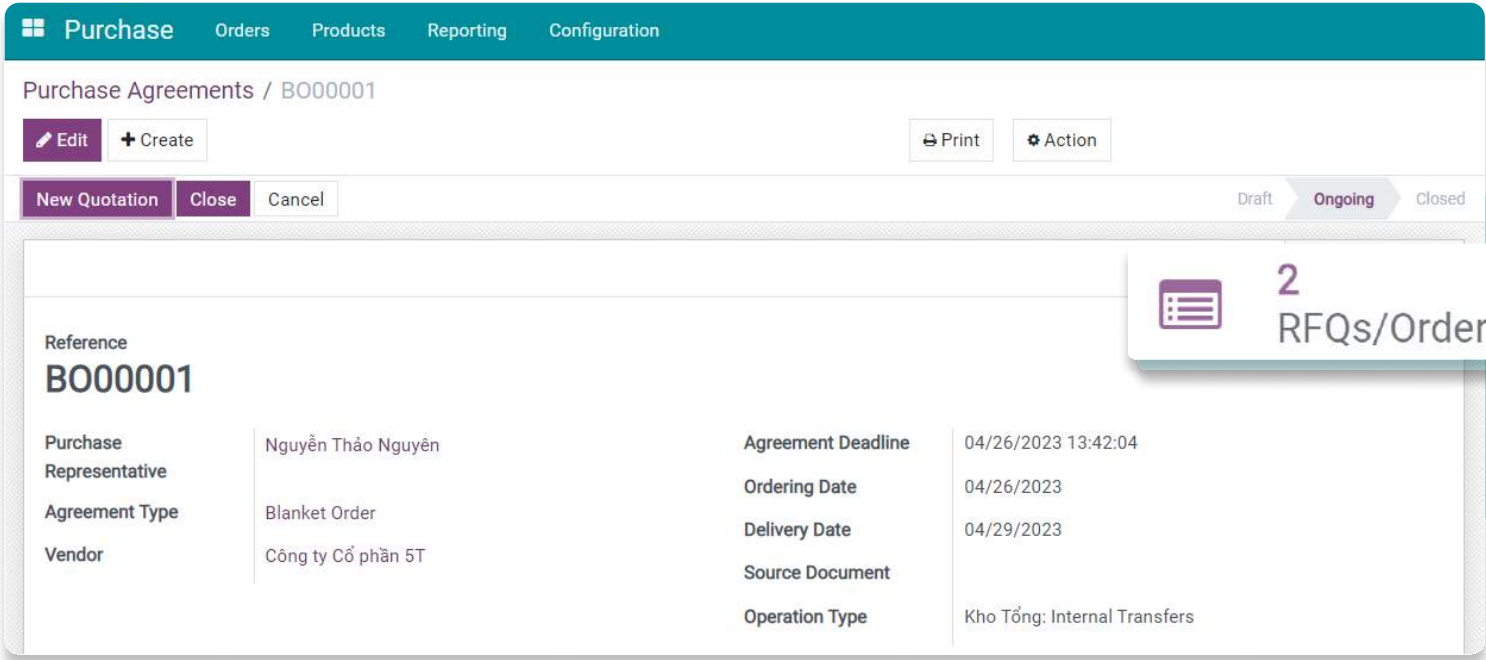
After agreeing on the purchase agreement with the vendor, you fill in the information on the Purchase agreement, then press **Confirm**.



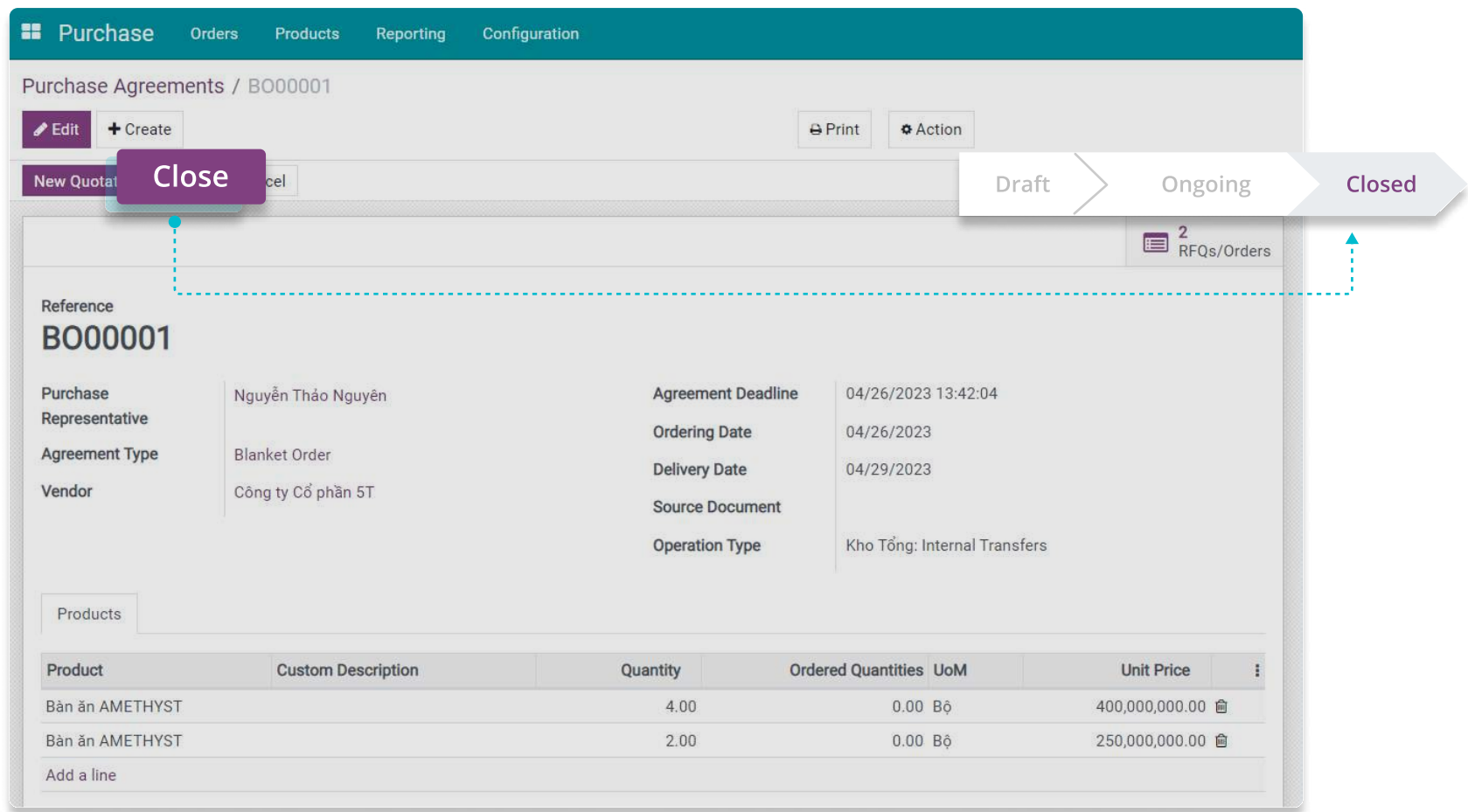
From the Blanket order, you can create multiple Requests for quotation at different times and quantities. You click **New Quotation** to create a new Request for quotation.

Product information is automatically obtained from the Blanket order, you can adjust the number of products in the detail lines of each Request for quotation. Then you contact the vendor to confirm the Request for quotation.

You may see Requests for quotation or Purchase orders attached to the Purchase agreement.



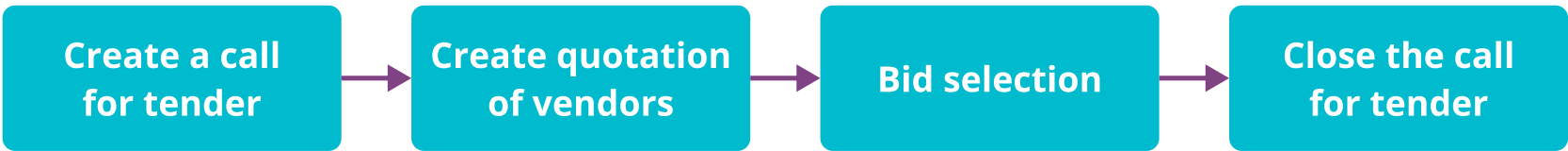
When the validity period has expired and the vendor has delivered the full amount of the Blanket order, you press **Close** to complete.



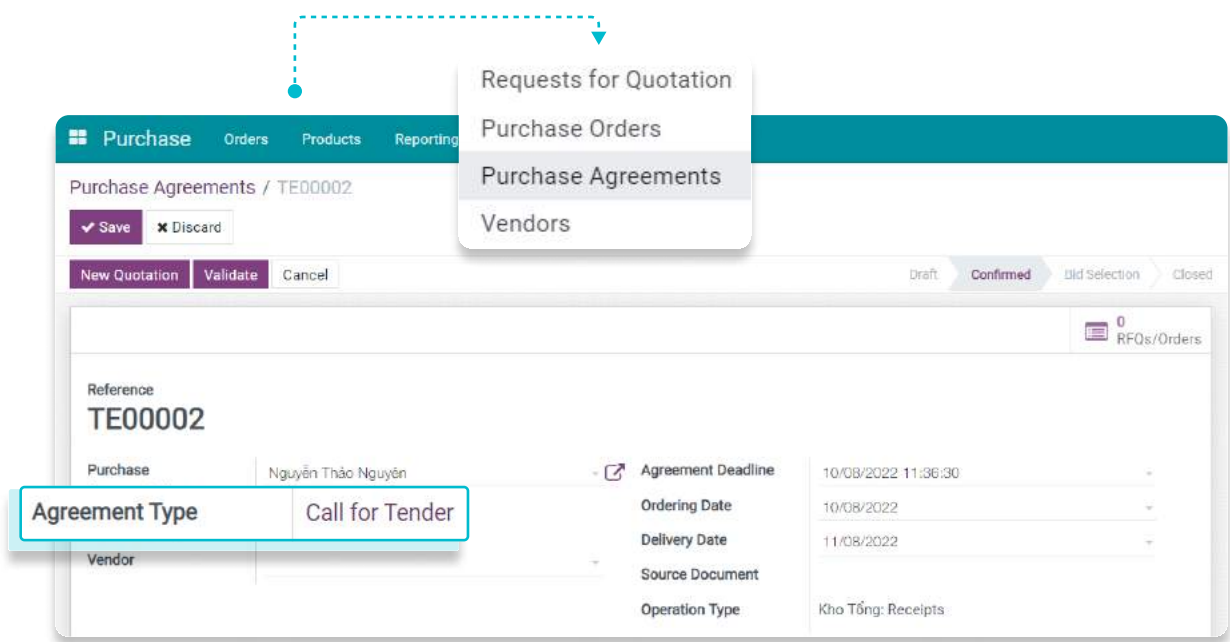


Create a call for tender

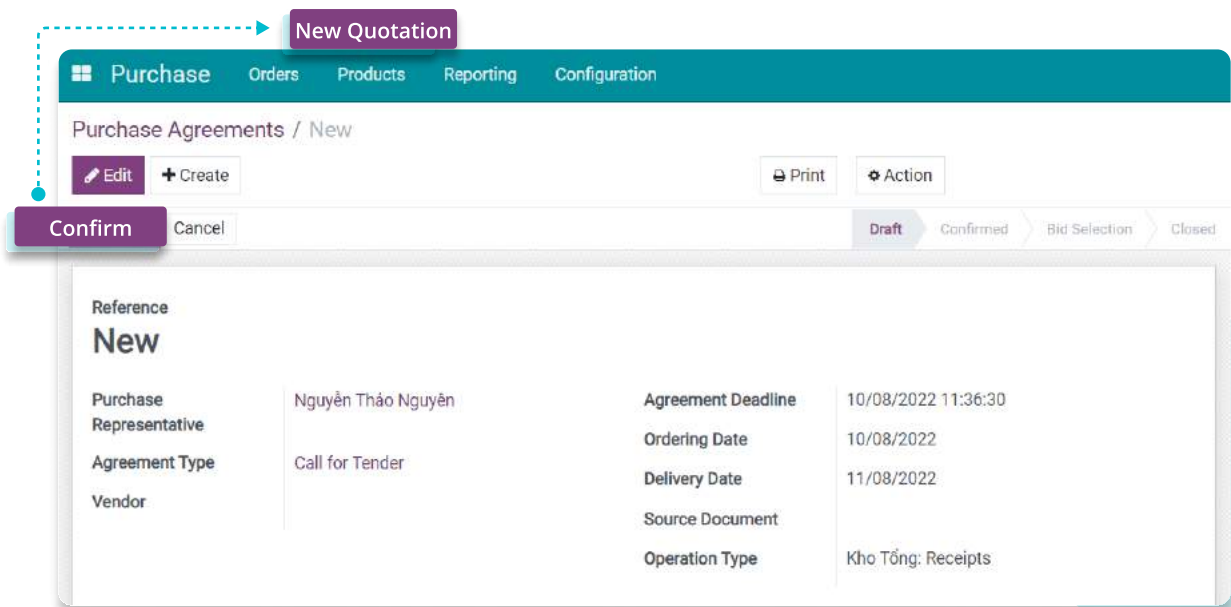
When businesses want to refer prices from many different vendors to choose the vendor with the reasonable price, they can use the Call for tender feature. The call for tender process is shown in the diagram below:



Navigate to **Purchase** ▸ **Orders** ▸ **Purchase Agreements** ▸ **Create**, select **Agreement Type** as *Call for Tender*.

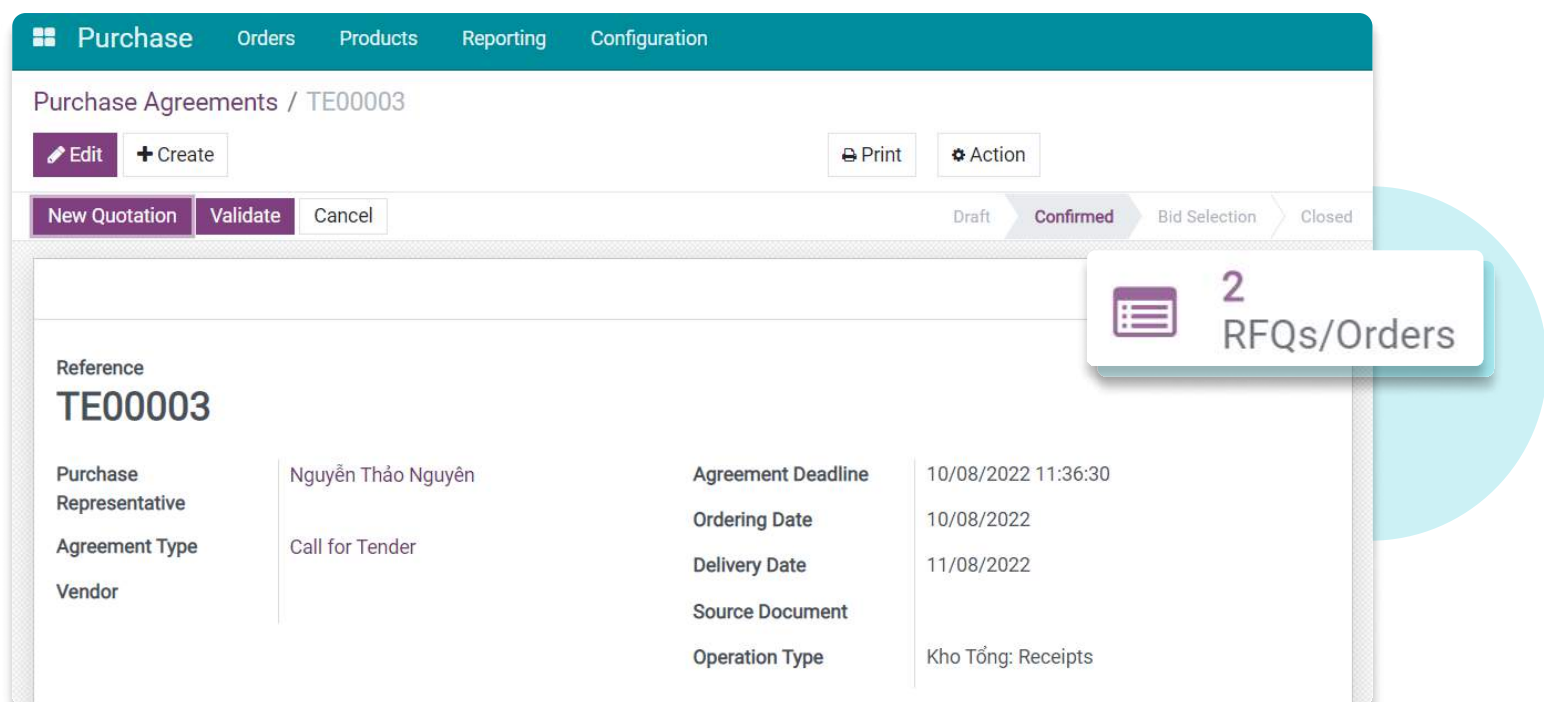


When the information of the purchase agreements is filled in, press **Confirm**.

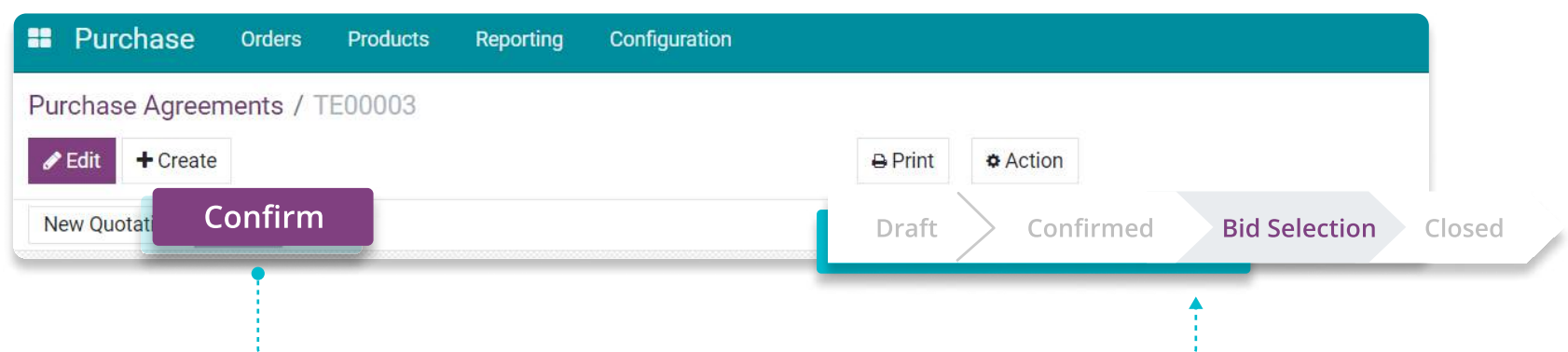


Create requests for quotation and send them to different vendors by pressing **New Quotation**:

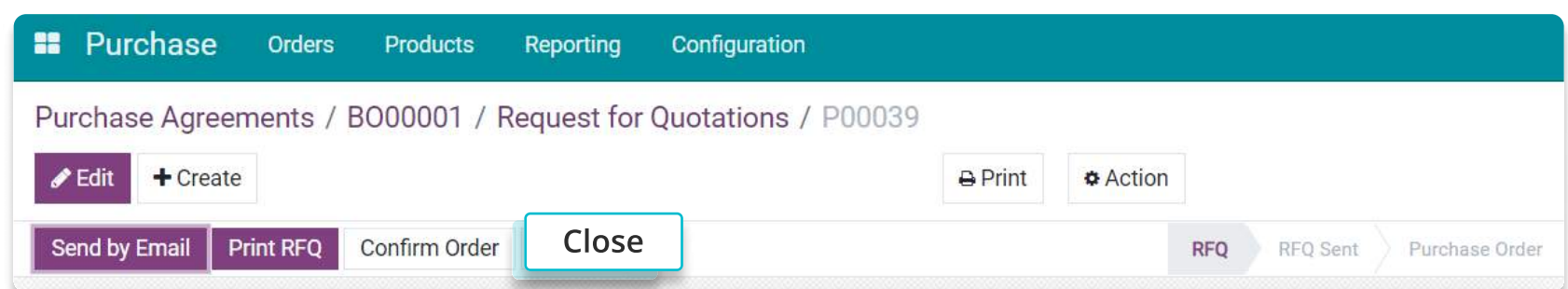
The product information on the Purchase agreements will be automatically filled in the Request for quotation. You will fill in the appropriate tender vendor information. You can see the number of Requests for quotation or Purchase orders attached to this Call for tender.



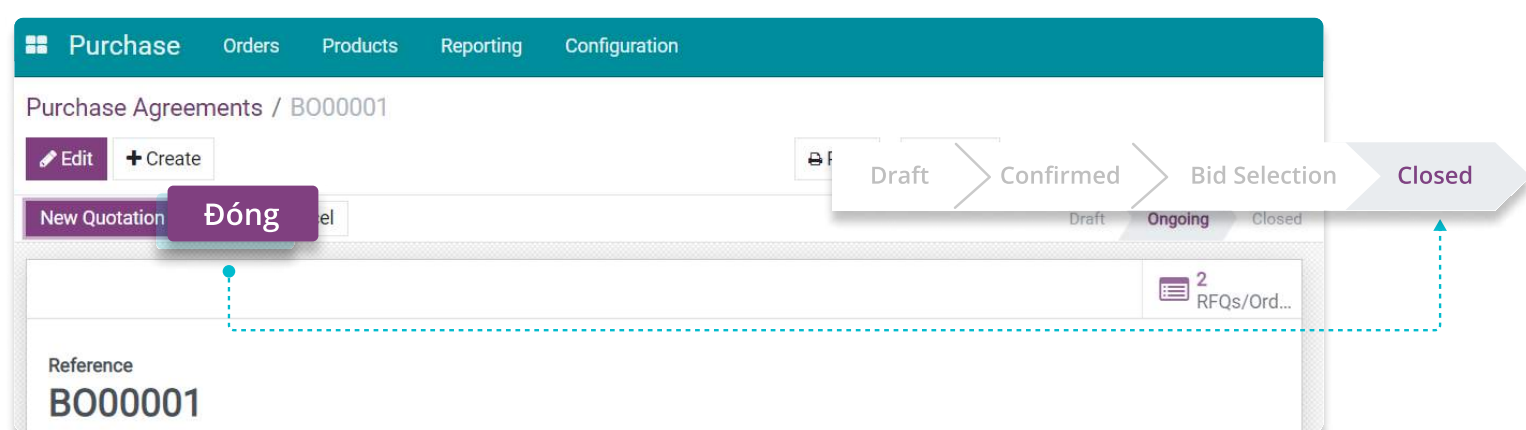
After selecting the appropriate vendors, you choose **Validate** to move to the **Bid Selection** state.



Then cancel the other requests for quotation to close the Bidding.



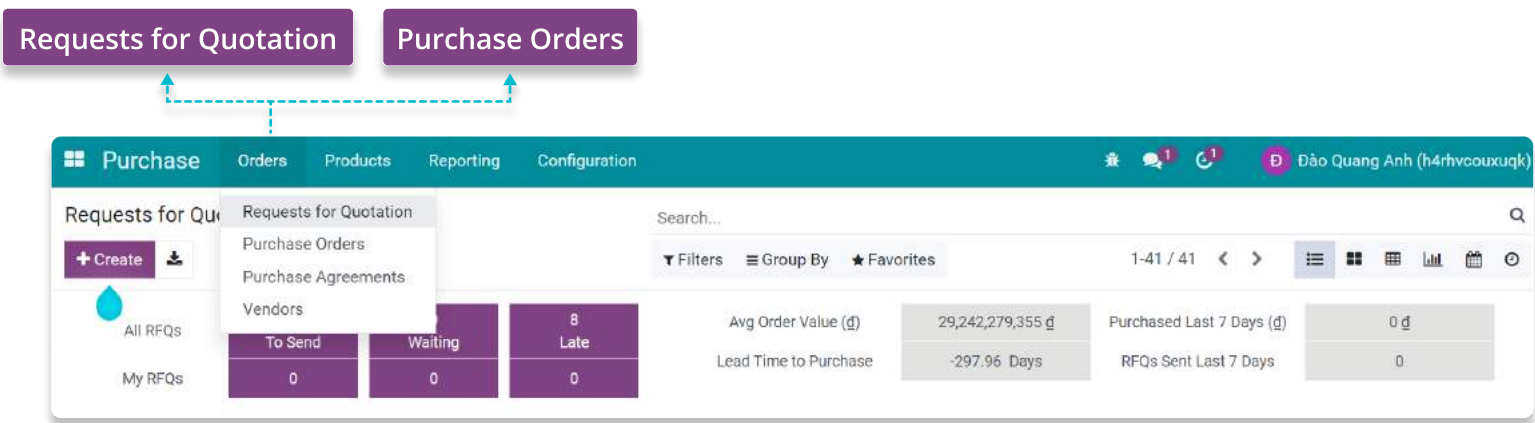
You press **Close** to end the Bidding.



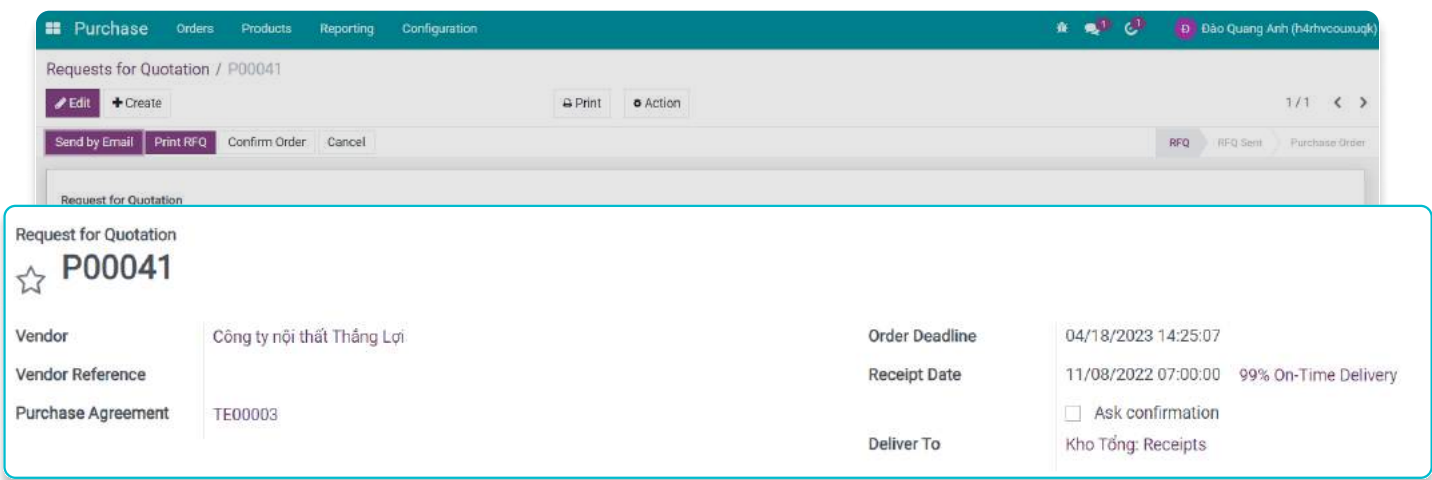
CREATE A PURCHASE ORDER

To manage the requests of quotation that you send to the vendors, navigate to the **Purchase app ▶ Orders ▶ Requests for Quotation** and press **Create**.

Or navigate to the **Purchase app ▶ Orders ▶ Purchase Orders** and press **Create** in case you have confirmed the order with the vendor and no longer need to receive quotations.

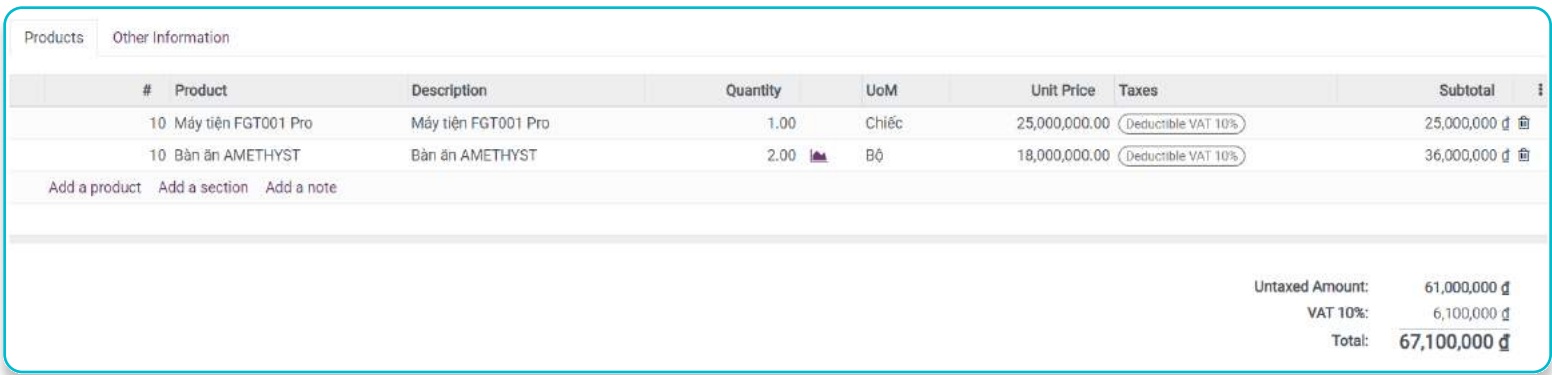


On the **Requests for Quotation** or **Purchase Orders** view, add the following information:



- *Vendor*: Select a vendor from an existing list or you can create a new one.
- *Order Deadline*: The day you close the request and stop receiving the vendor’s quotation.
- *Receipt Date*: The delivery date promised by the vendor. This date is used to determine the estimated arrival time.

At the **Products** tab, add information related to the product you want to purchase as follows:

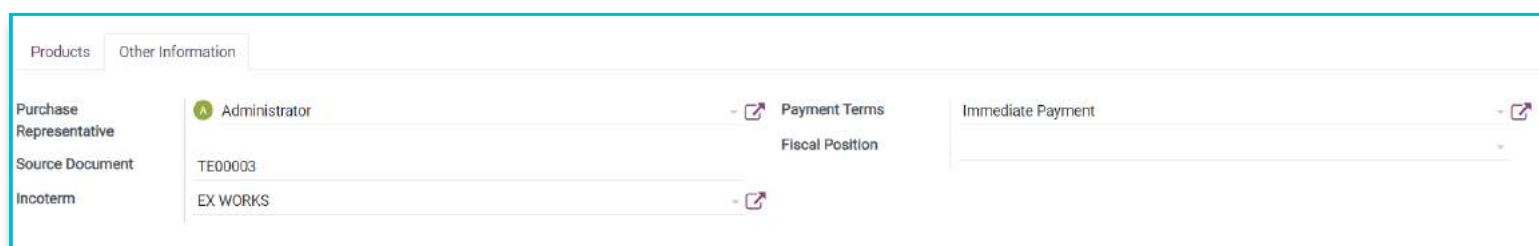




Press **Add a product** and fill in the information related to the product you want to buy as follows:

- *Product*: Select a product from an existing list or create a new one.
- *Quantity*: Enter the quantity you want to order.
- *Unit Price*: The unit price of the product. Leave empty for orders that require vendor quotations.
- *Taxes*: Select the tax rate applying to the product.

At the **Other Information** tab, pay attention to the following information:



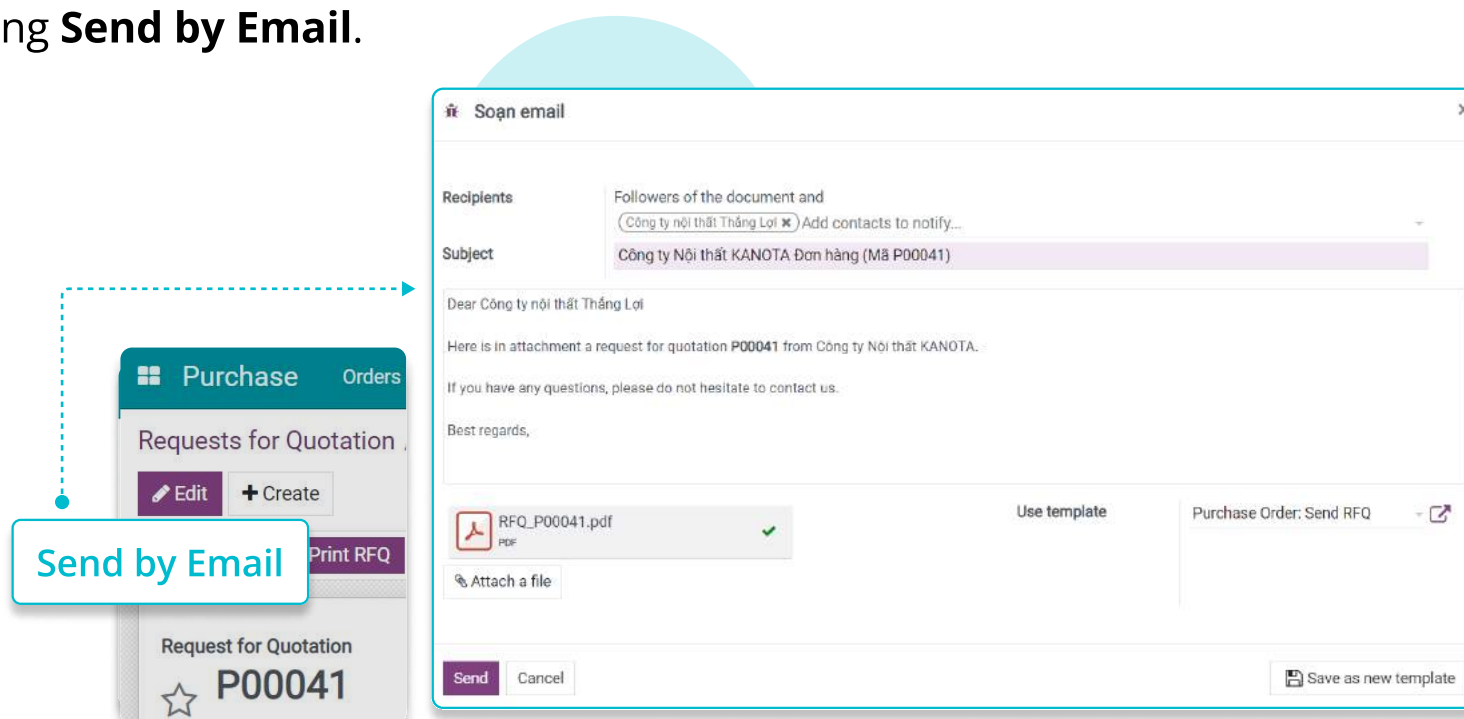
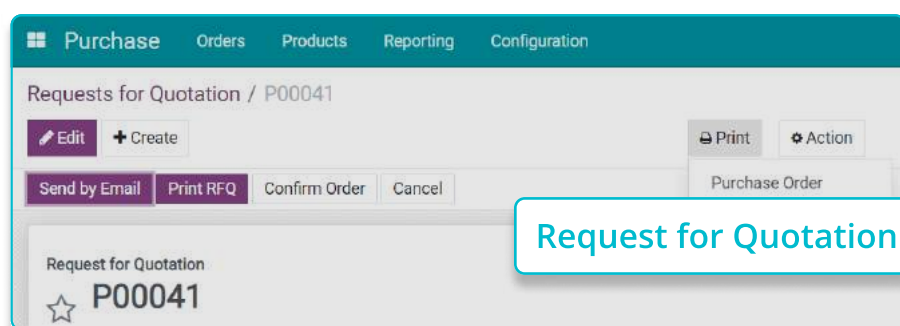
- *Purchase Representative*: The user who created this request for quotation will be displayed by default but you can select another person in charge.
- *Payment Terms*: Select the payment term that applies to the purchase order.

Press **Save** to save the information.

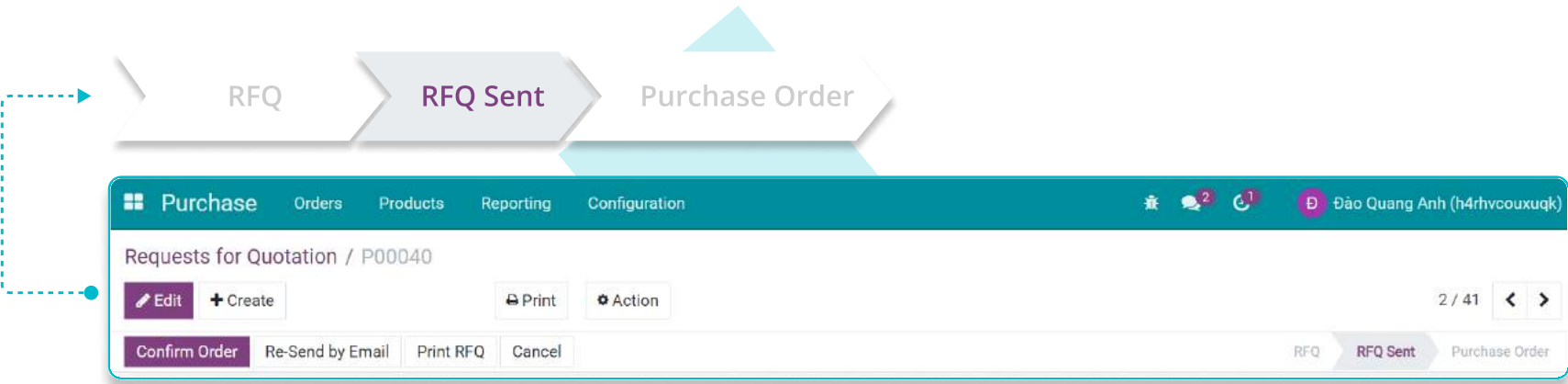
## CONTACT VENDOR

Press **Print** ► **Request for Quotation** to print out the request for quotation in PDF format and send it to the vendor.

Or use the suggested sending via email to the vendor feature by pressing **Send by Email**.

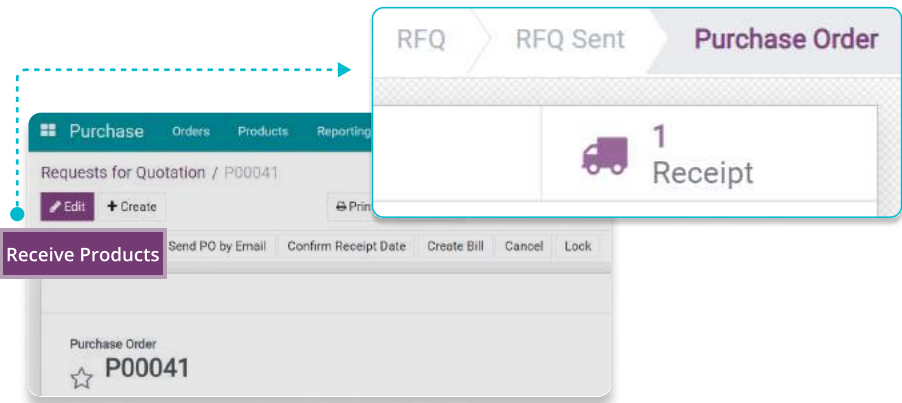


The Request for Quotation in PDF format will be automatically attached to the email, edit the email content if necessary and press **Send**. Once done, the **Request for Quotation** status will be changed to *RFQ Sent*.



CONFIRM A PURCHASE ORDER

After evaluating and agreeing with the price offered by the vendor, you press **Confirm Order** to confirm the purchase order.



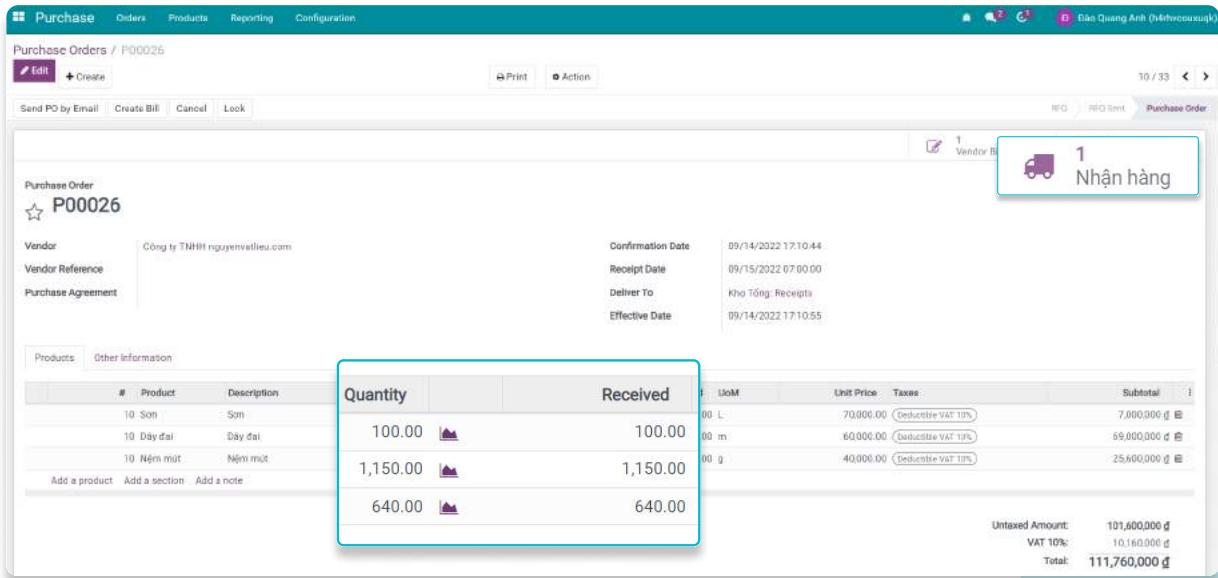
PAYMENT

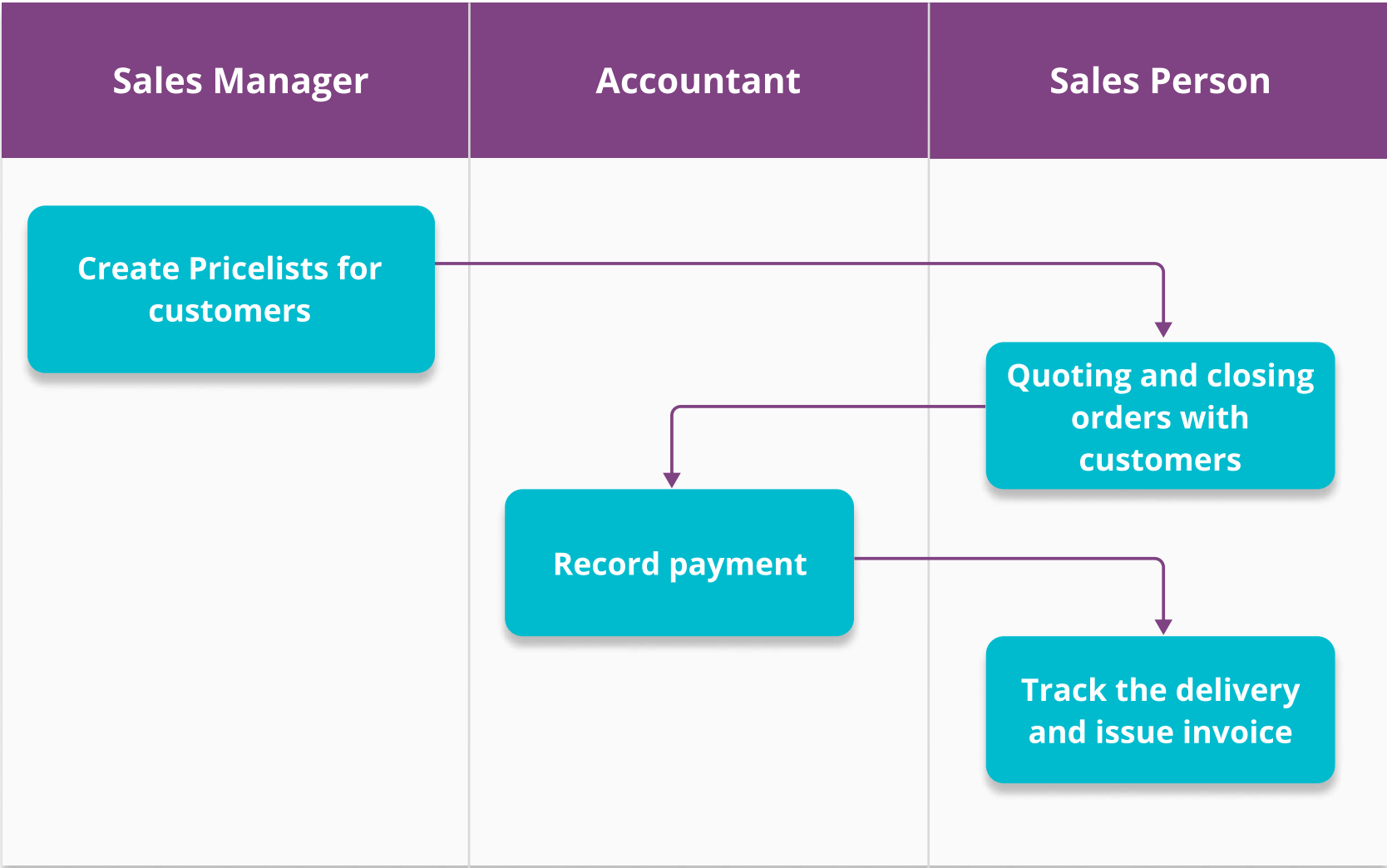
- ➡ See details at:
  - Account Payables.

TRACKING PRODUCTS DELIVERY

Viindoo allows the procurement officer to view the received quantity of products on each purchase order, in the **Received** column:

On the other hand, if you are granted access to the *Inventory* app, you can track the delivery of the product right from the purchase order view by clicking on the **Receipt** button:

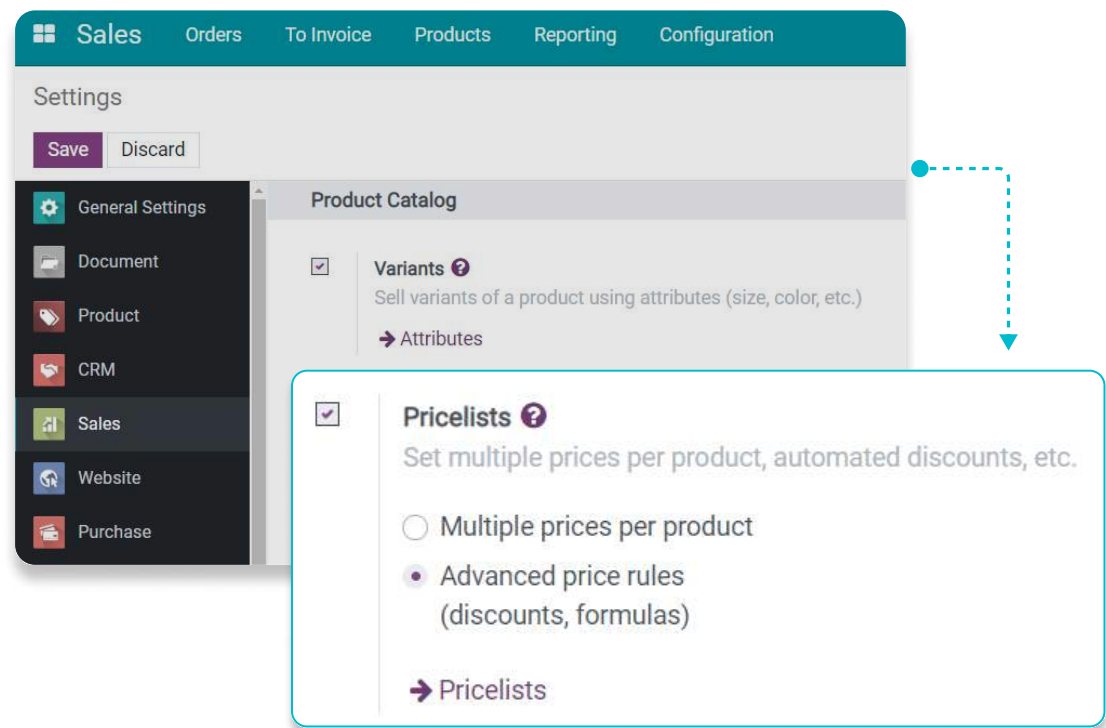




CREATE PRICELISTS FOR CUSTOMERS

Activate the Pricelists feature

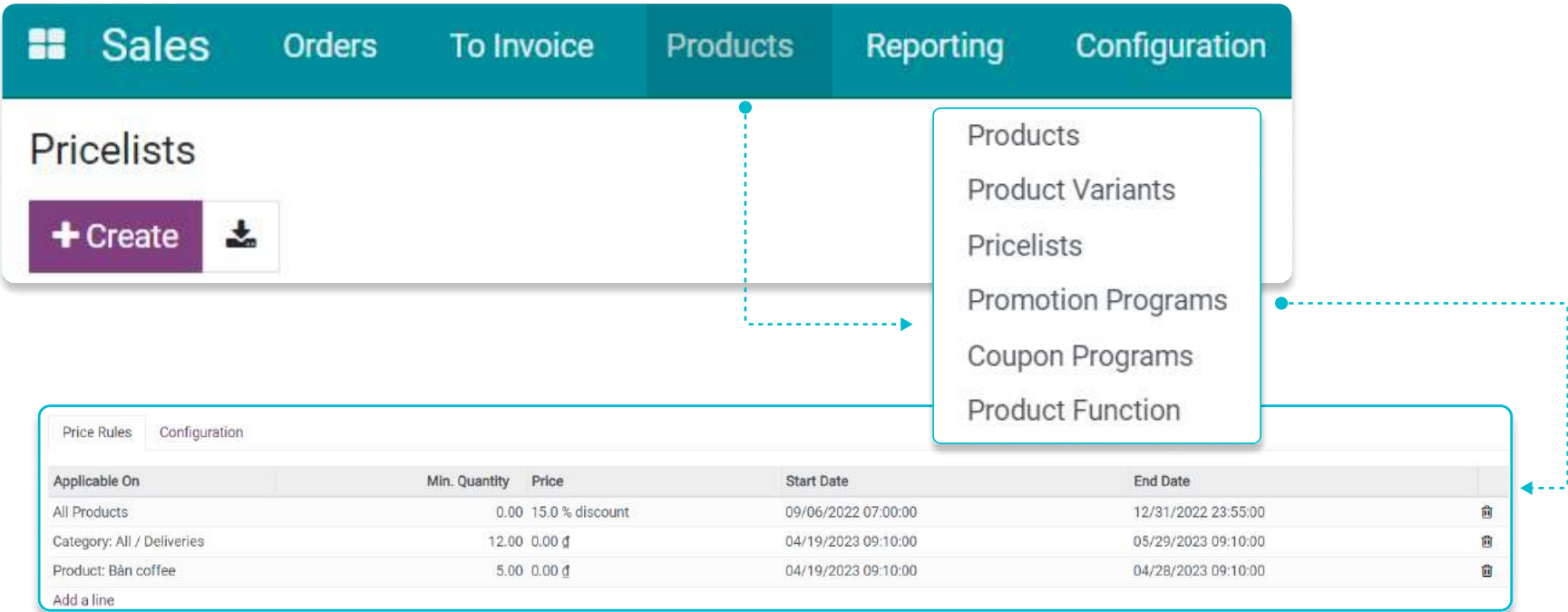
Navigate to the **Sales app** ► **Configuration** ► **Settings**. Go to the **Pricing** section and activate the **Pricelists** feature. Enable the **Multiple prices per product** option to set up pricelists using basic formulas. Press **Save** to finish.





Create a pricelist for each customer

Navigate to **Sales ▶ Products ▶ Pricelists**. Press **Create** to create a new pricelist.

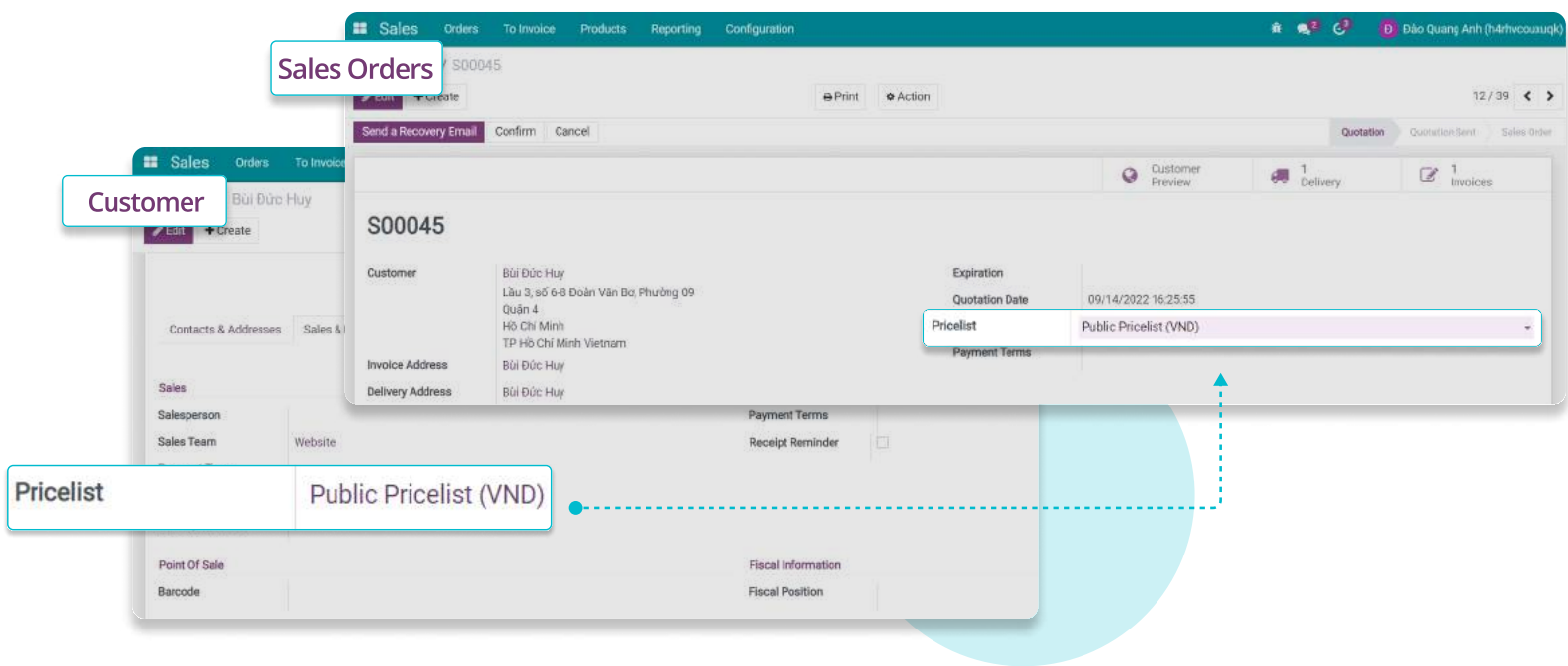


On the **Price Rules** tab, press **Add a line** and add the following information:

- *Products*: Select the products that this pricelist will be applied to.
- *Min. Quantity*: The minimum sales quantity that needs to be reached in order to apply the price configured in the **Price** column.
- *Price*: Set up the sales price for the product.
- *Start Date/End Date*: The applicable period of this pricelist. If left empty, the pricelist can be used anytime.

After adding all the important information, press **Save**.

To apply a pricelist to a specific customer or a group of customers, navigate to **Sales ▶ Orders ▶ Customers**, and select the partner you want to apply this pricelist to. On the **Sales & Purchase** tab, select the pricelist you’ve just created.



With the above configuration, this pricelist will be automatically applied when you create a quotation for this customer.

If you want to select another pricelist, press **Edit**, select the desired one then follow the instructions of the system, the product prices will be updated according to the selected pricelist.

Pricelist

Public Pricelist (VND)

Benelux (VND)

EUR (EUR)

Bảng giá niêm yết (USD)

Default USD pricelist (USD)

Giảng sinh (VND)

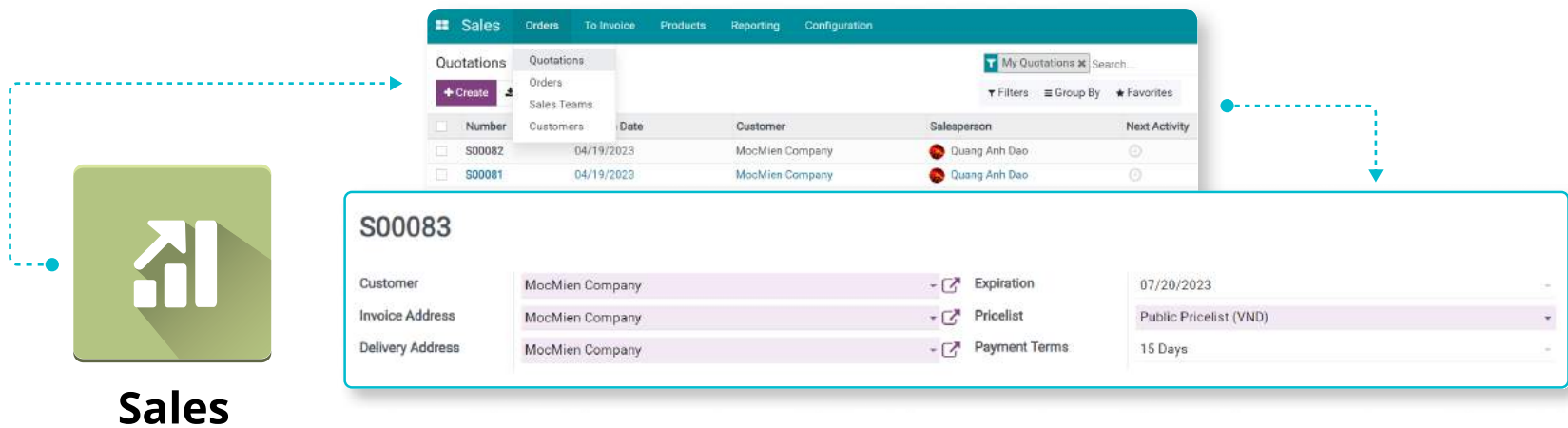
*Viindoo also provides tools to set up Pricelists with more complicated rules and formulas*

- ➡ See details at:
- [Guide to set up pricelists with advanced price rules.](#)

## QUOTING AND CLOSING ORDERS WITH CUSTOMERS

### Create a new quotation

Navigate to **Sales ▶ Orders ▶ Quotations**. Press **Create**.



On the quotation, add the necessary information before sending it to the customer:

- *Customer*: Select an existing customer or create a new one.
- *Expiration*: The day this quotation expires.
- *Pricelist*: The pricelist applied to this customer.
- *Payment Terms*: Select the payment term for this quotation/sales order to track this customer's payments.

- ➡ See details at:
- [How to create a new contact in Viindoo.](#)
  - [Activate Terms and Conditions in Sales.](#)

Order Lines tab:

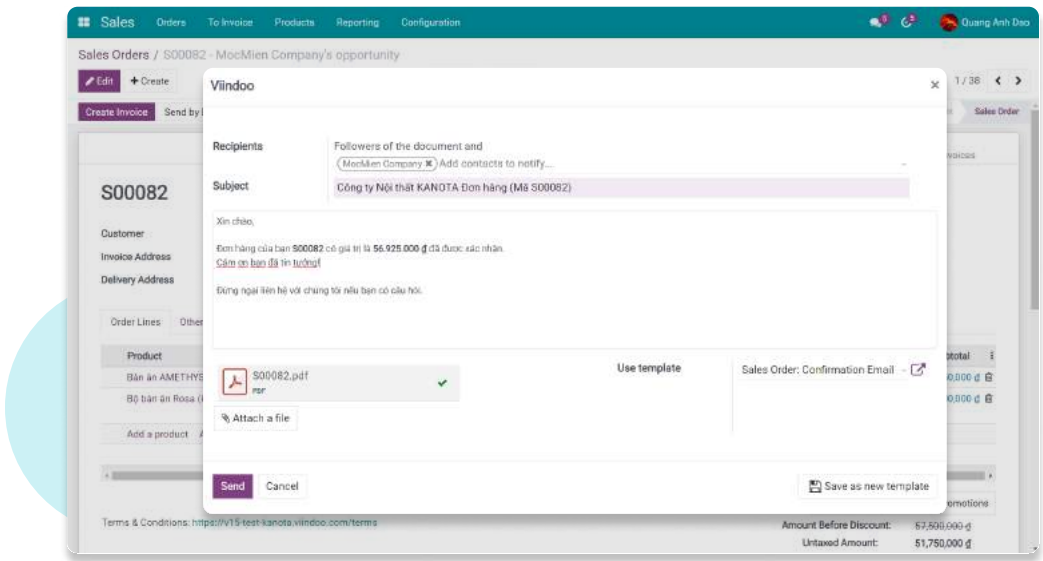
Order Lines									
Optional Products									
Other Info									
Customer Signature									
Product	Description	Quantity	UoM	Unit Price	Taxes	Disc.%	Subtotal		
Giường bọc nỉ	Giường bọc nỉ	2.00	Chiếc	45,000,000.00	Value Added Tax (VAT) 10%	0.00	90,000,000 đ		
Bộ sofa nỉ phòng khách	Bộ sofa nỉ phòng khách	2.00	Bộ	90,000,000.00	Value Added Tax (VAT) 10%	0.00	180,000,000 đ		
Bộ bàn ăn Rosa (kèm hộc để rượu)	Bộ bàn ăn Rosa (kèm hộc để rượu)	2.00	Bộ	30,000,000.00	Value Added Tax (VAT) 10%	0.00	60,000,000 đ		
Ghế đọc sách bọc da	Ghế đọc sách bọc da	2.00	Chiếc	4,500,000.00	Value Added Tax (VAT) 10%	0.00	9,000,000 đ		
Giường âm tường Navi	Giường âm tường Navi	3.00	Units	26,000,000.00	Value Added Tax (VAT) 10%	0.00	78,000,000 đ		
[Delivery_007] Free delivery charges	Miễn phí giao hàng Miễn phí giao hàng	1.00	Units	0.00	Value Added Tax (VAT) 10%	0.00	0 đ		
Add a product   Add a section   Add a note									

Press **Add a product** to select a product and fill in the other information such as Quantity, Unit Price, Taxes, and Discount (if applicable). The total Untaxed Amount, VAT, and final total Total of this order.

After filling in all the information, press **Save** to complete the quotation.

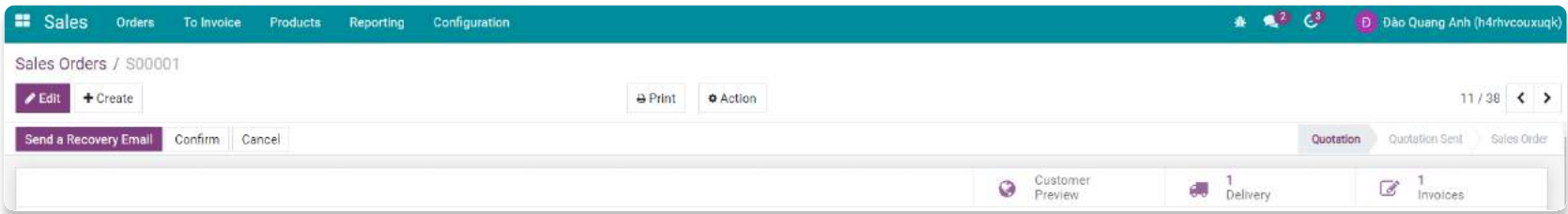
Confirming a sales order

You can send the quotation to your customer by pressing **Send by Email**, editing the email content if needed, then clicking **Send**. The PDF version of the quotation will be automatically attached to this email.



After receiving the customer feedback, you might encounter one of the following situations:

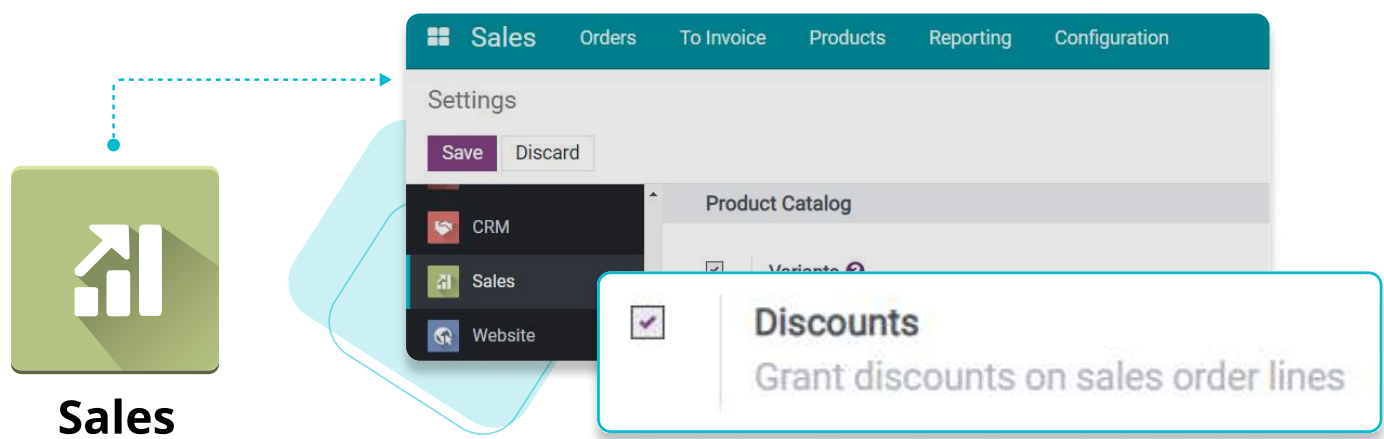
- *The customer doesn't agree with your quotation:* Press **Edit** to adjust the quotation according to the agreement with your customer or press **Cancel** to cancel this sales order.
- *The customer agreed with your quotation:* Press **Confirm** to confirm the quotation. This quotation will become a **Sales order**.





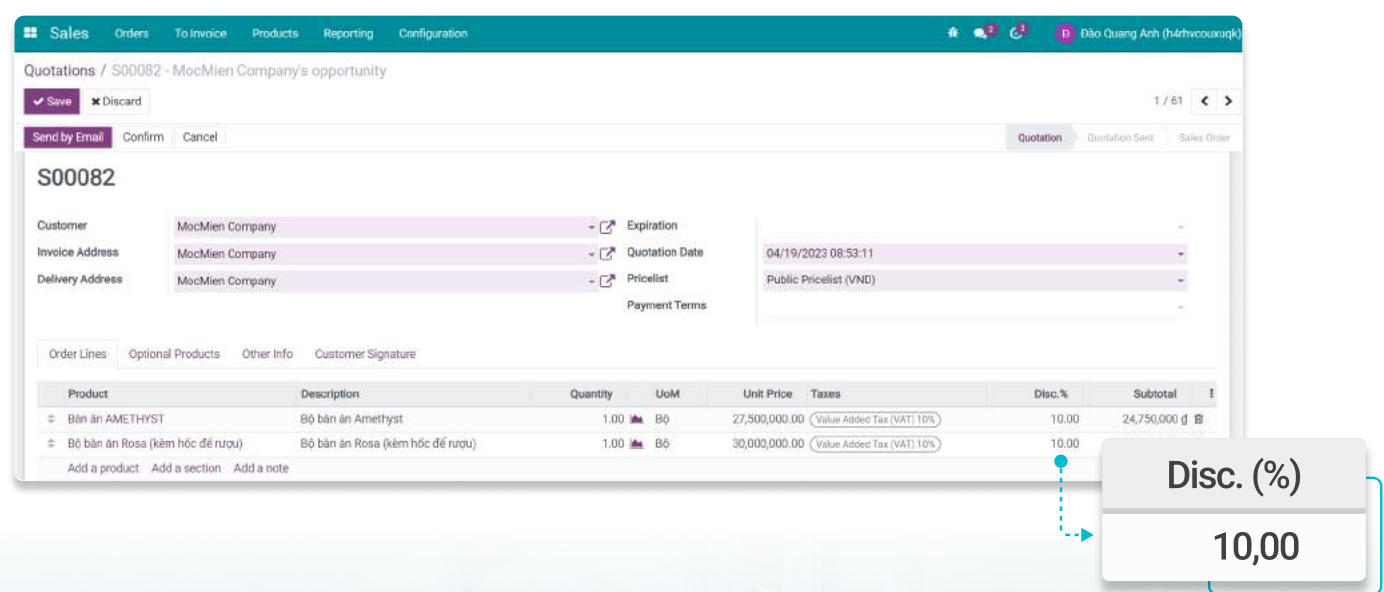
## Applying discounts to a sales order

In many situations, as a business, you might want to give discounts to your customers. You can easily do that by navigating to the **Sales app** ▶ **Configuration** ▶ **Settings**. Go to the Pricing section to activate the **Discounts** feature:



Press **Save** to finish.

Once the feature is activated, the **Disc.%** column is displayed on each sales order which allows you to set up a discount for each product on the sales order:



## RECORD PAYMENT

➔ See details at:

- Record customer payment from Sales order.

## TRACK THE DELIVERY AND ISSUE INVOICE

### Track the delivery

From the sales order view, you can track the delivered quantity of the product at the **Delivered** column:

The screenshot shows the 'Sales Order' view for order S00082. The 'Delivered' column in the table shows a value of 1.00 for the first product. A callout box labeled '1 Delivery' with a truck icon points to the 'Delivery' button in the top right corner. Another callout box labeled 'Delivered 1,00' points to the 'Delivered' column value.

Product	Description	Quantity	Delivered	Invoiced	UoM	Unit Price	Taxes	Disc.%	Subtotal
Bàn ăn AMETHYST	Bộ bàn ăn Amethyst	1.00	1.00	0.00	Bộ	27,500,000.00	Value Added Tax (VAT) 10%	10.00	24,750,000 đ
Bộ bàn ăn Rosa (kèm hộc để rượu)	Bộ bàn ăn Rosa (kèm hộc để rượu)	1.00	1.00	0.00	Bộ	30,000,000.00	Value Added Tax (VAT) 10%	10.00	27,000,000 đ

Or you can click on the **Delivery** button to see the delivery status, this helps you to be proactive in tracking orders and supporting your customer.

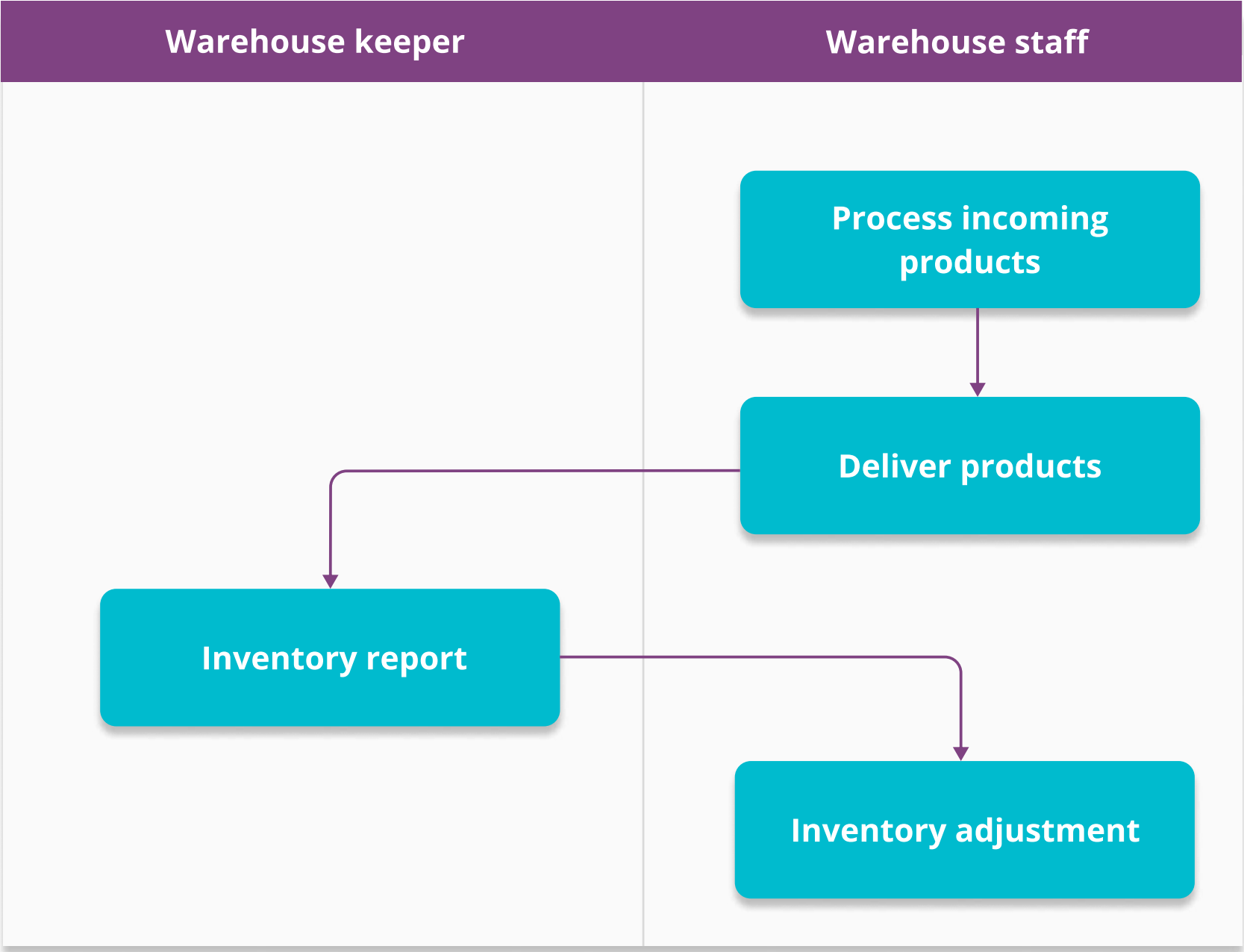
In order to see the delivery orders, your employees must have access right to the **Inventory** app.

### Tracking invoicing status

From the sales order view, you can also see the invoiced quantity of a product in the **Invoiced** column:

The screenshot shows the 'Sales Order' view for order S00082. The 'Invoiced' column in the table shows a value of 2.00 for the first product. A callout box labeled 'Invoiced 2,00' points to the 'Invoiced' column value.

Product	Description	Quantity	Delivered	Invoiced	UoM	Unit Price	Taxes	Disc.%	Subtotal
Bàn ăn AMETHYST	Bộ bàn ăn Amethyst	1.00	1.00	2.00	Bộ	27,500,000.00	Value Added Tax (VAT) 10%	10.00	24,750,000 đ
Bộ bàn ăn Rosa (kèm hộc để rượu)	Bộ bàn ăn Rosa (kèm hộc để rượu)	1.00	1.00	1.00	Bộ	30,000,000.00	Value Added Tax (VAT) 10%	10.00	27,000,000 đ

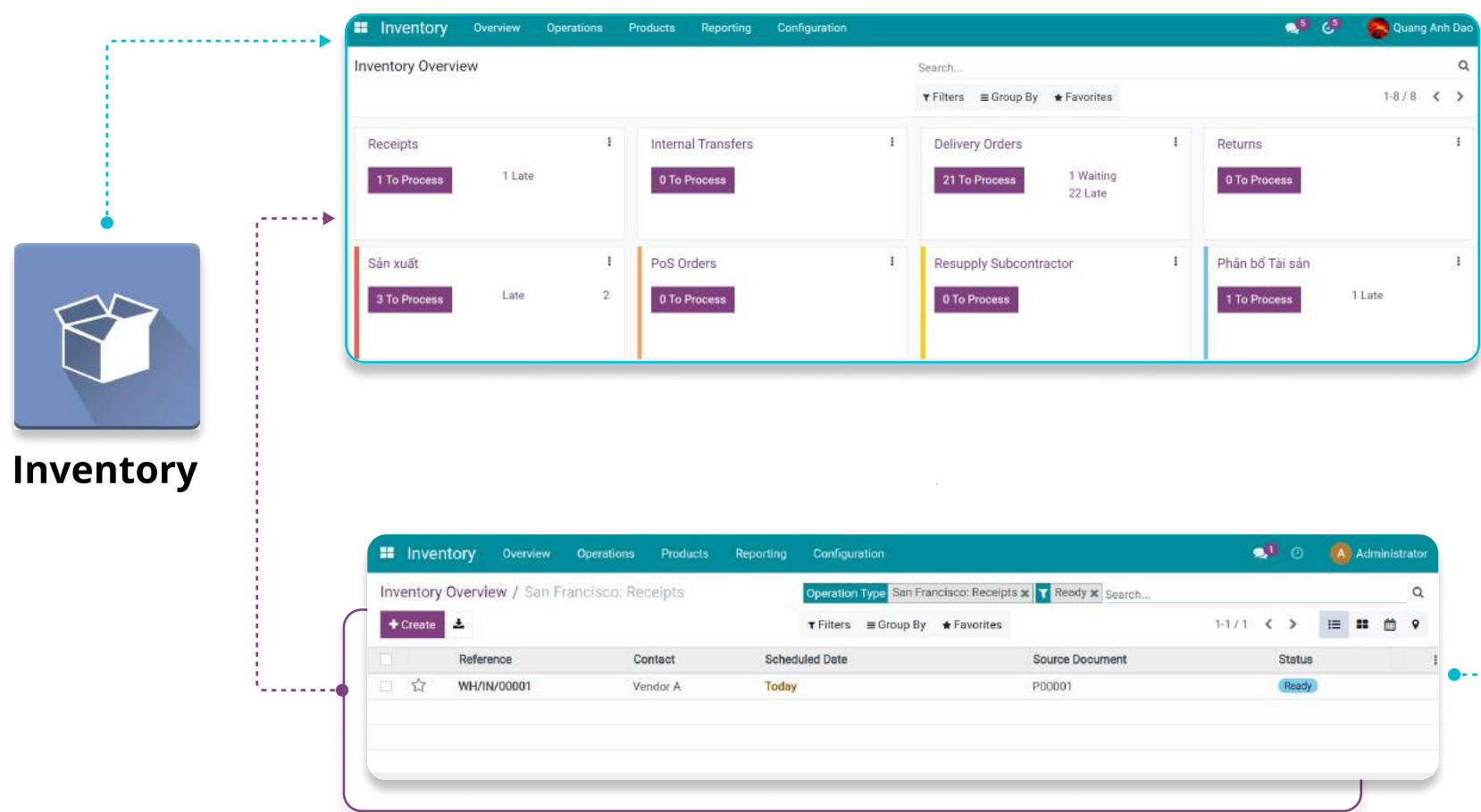




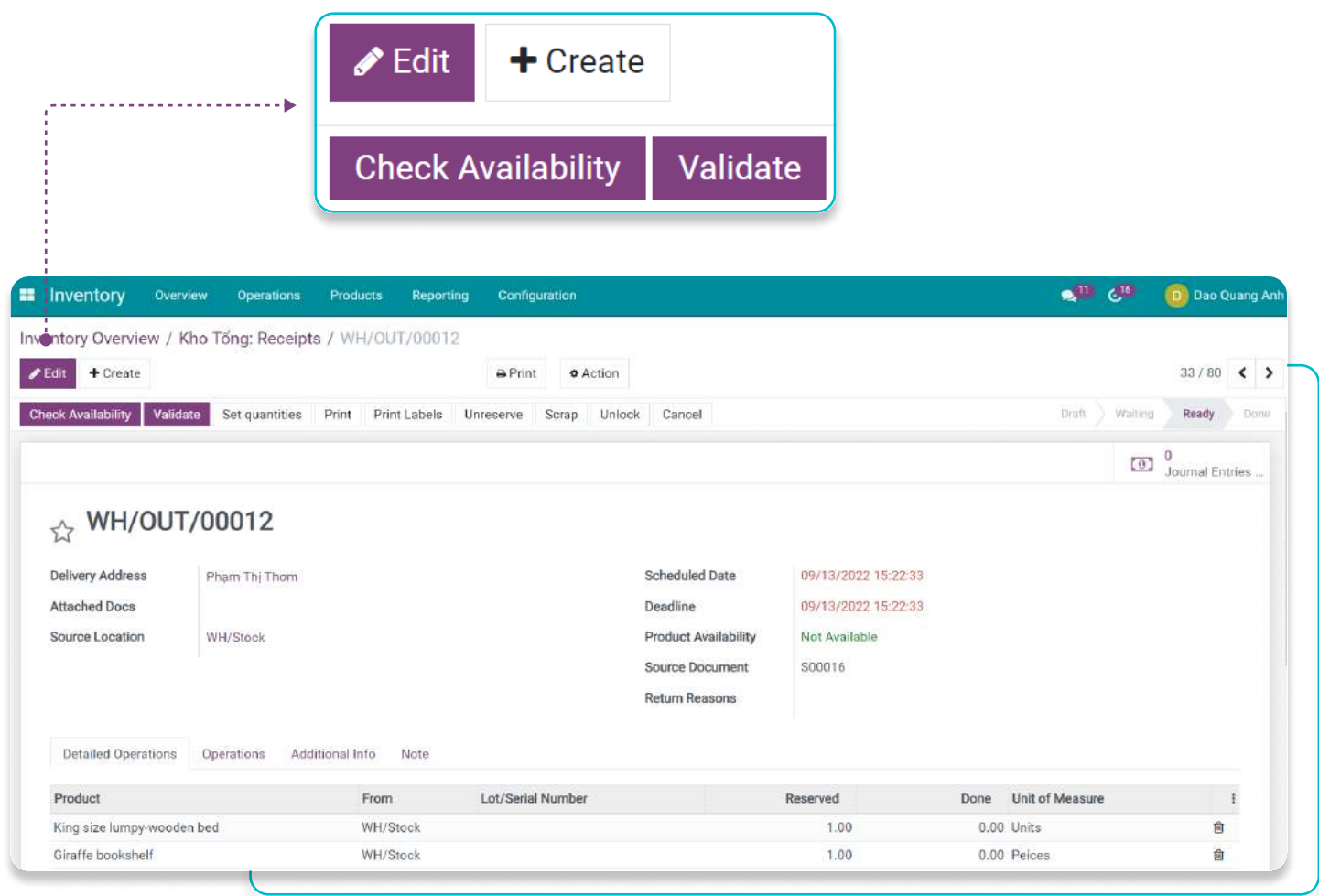
# PROCESS INCOMING PRODUCTS

## Receive products in one order

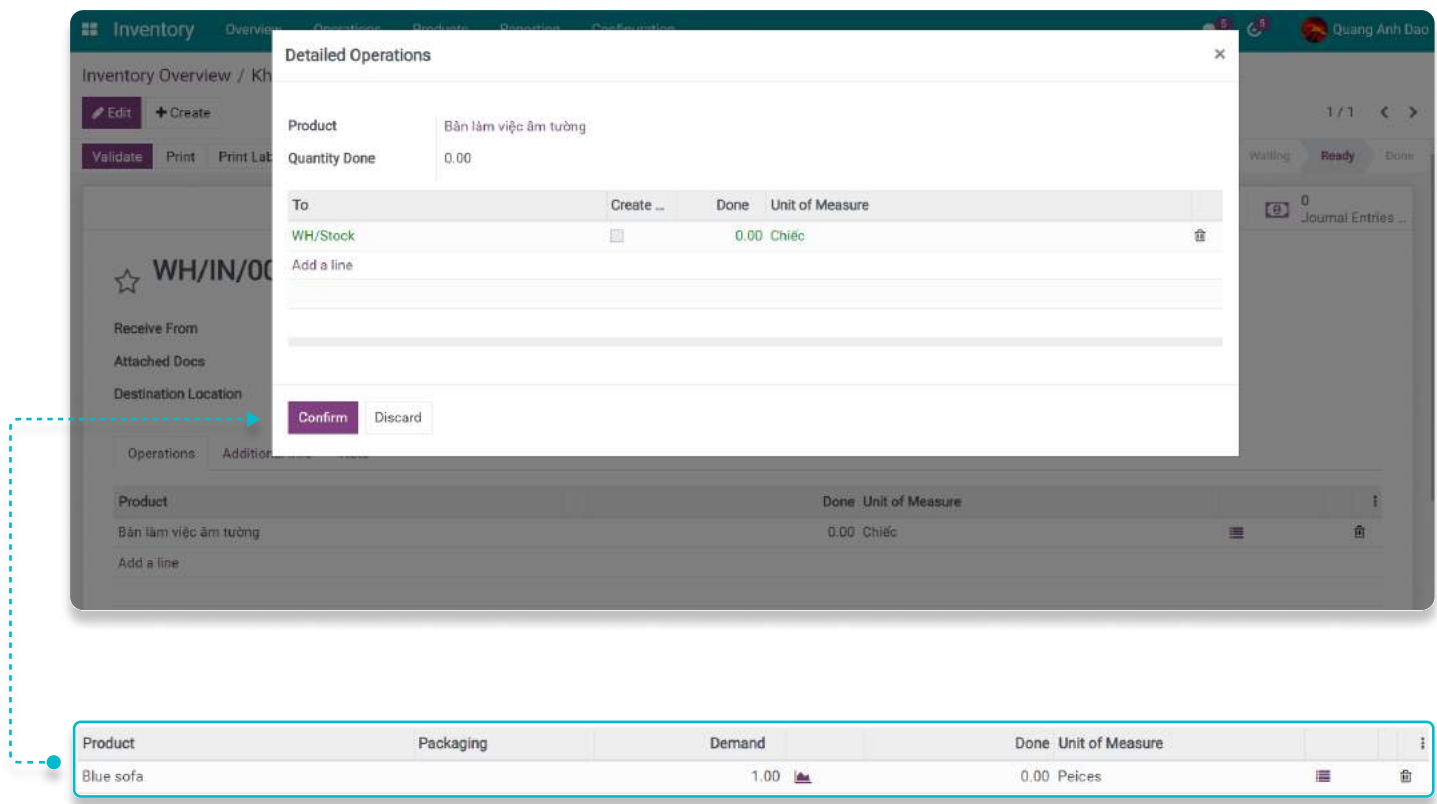
Step 1: Access the **Inventory** app, at the *Overview* interface, go to **Receipts** then press **To Process** to check and confirm the warehouse transfers.



Step 2: Click on the warehouse receipt. From here, press **Edit** and click on the  icon to record the received quantity. Then press **Confirm**.

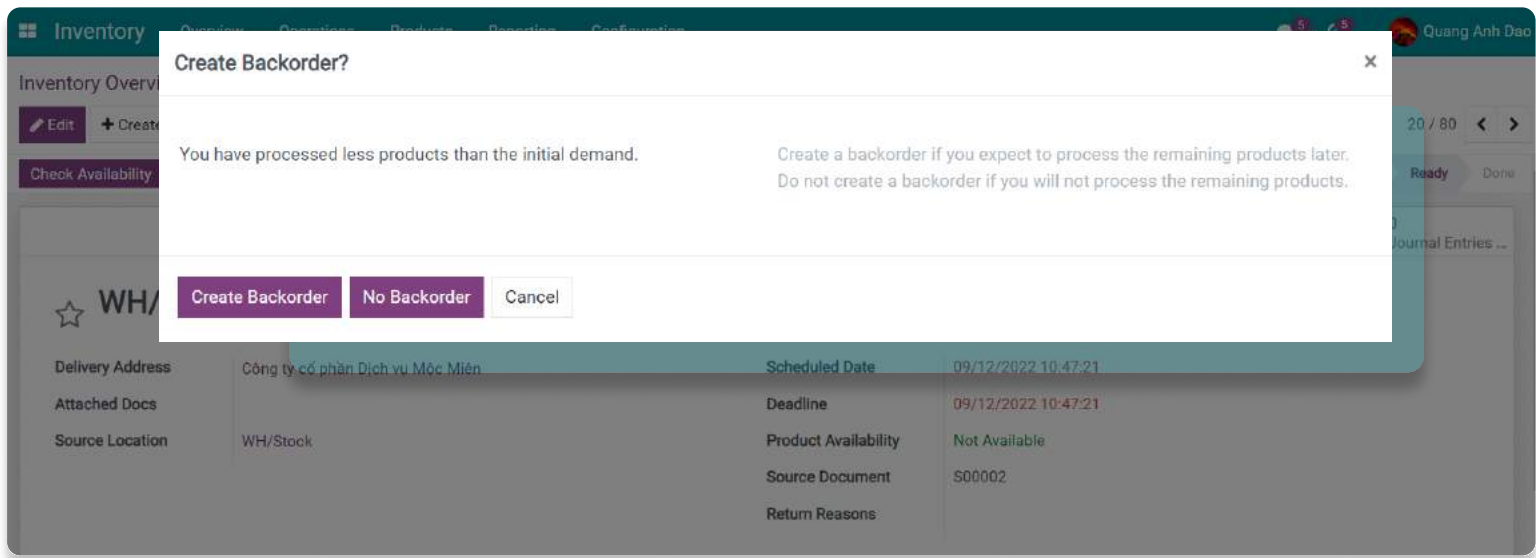


Step 3: At the inventory receipt transfer, press **Confirm** to complete. After confirming the received quantity, this information will be updated on the *Inventory Report*.



Receive products in multiple orders

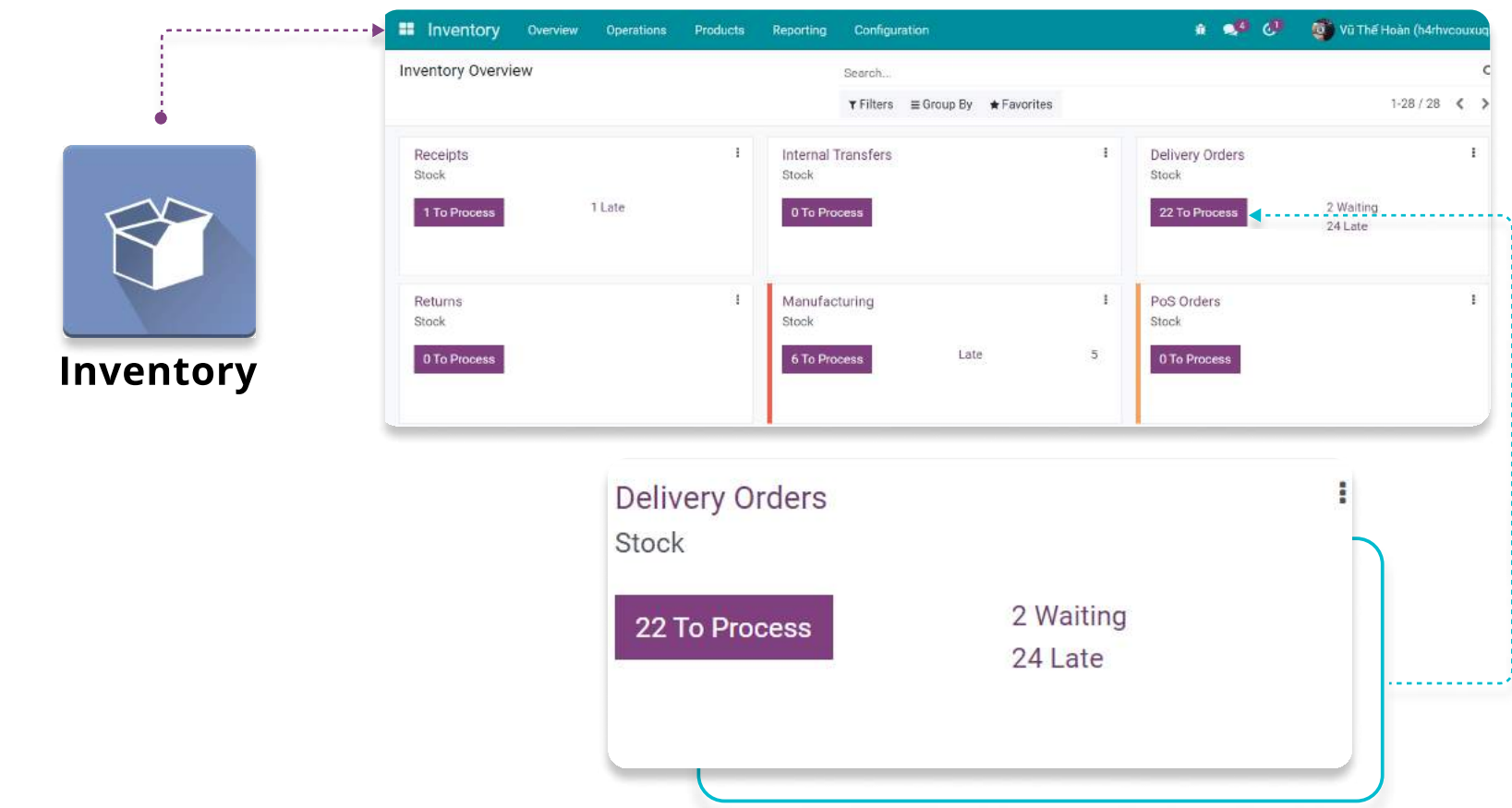
When the vendor delivers your order in various deliveries, proceed the similar steps as when you receive goods all at once. However, in **step 3**, after confirming the inventory receipt transfer, a pop-up window will be displayed, click **Create Backorder** to generate the transfer slip for the rest of your products.



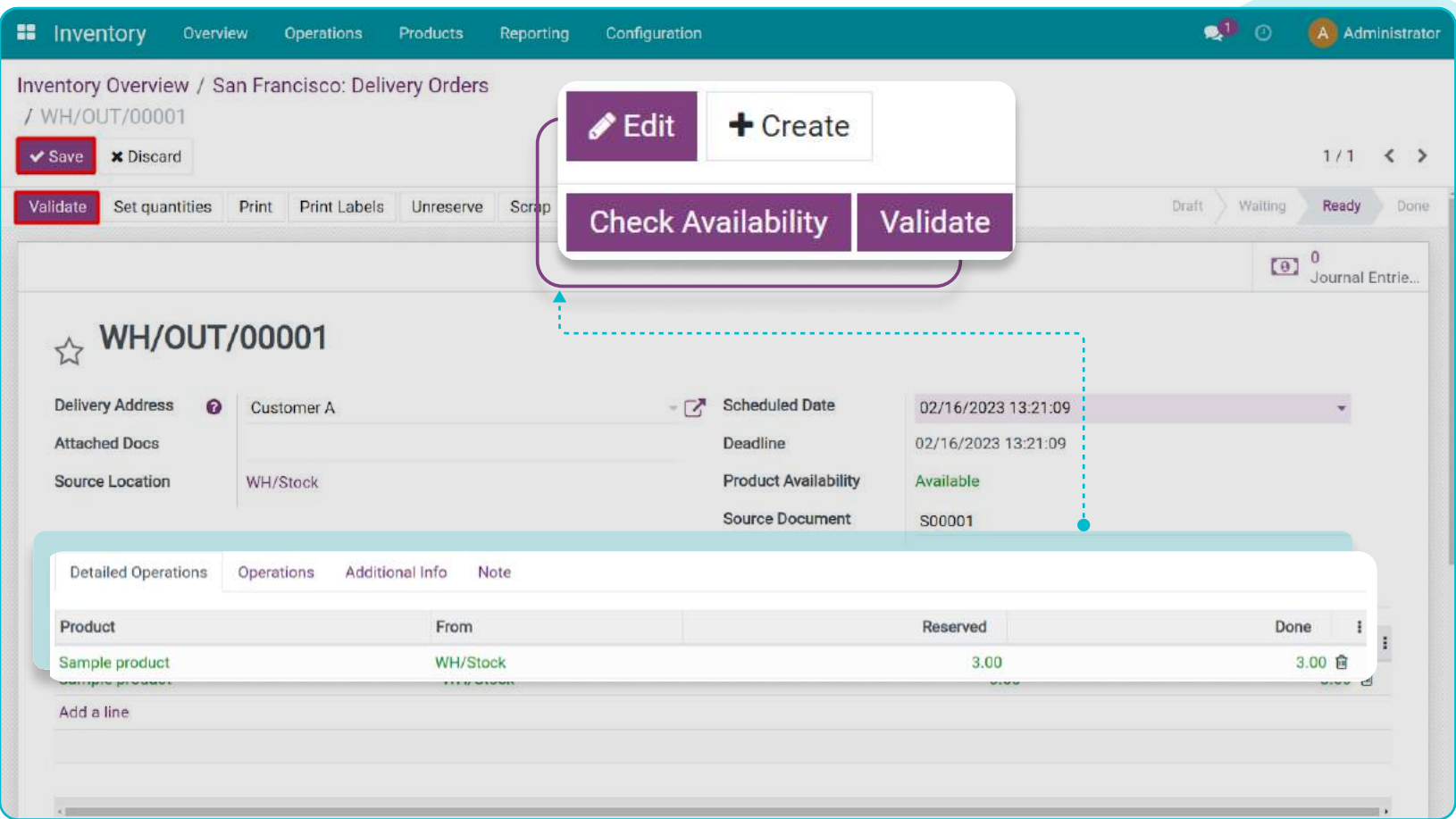
## DELIVER PRODUCTS

### Delivery all products in one order

Step 1: Access the **Inventory** application, at the *Overview* interface, go to **Delivery Orders** then click **To Process** to check and confirm the warehouse delivery orders.



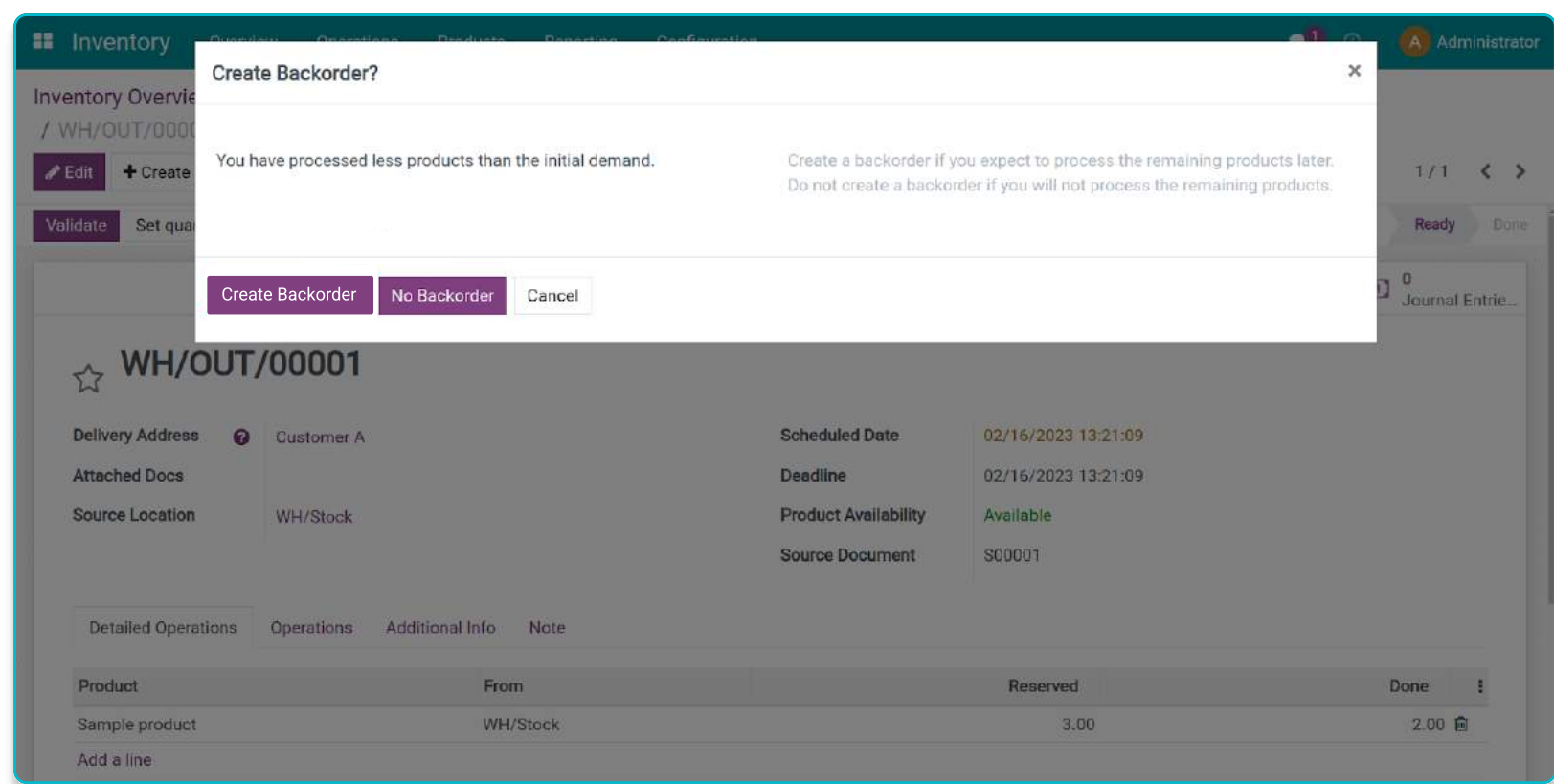
Step 2: Click on the delivery order. Then, press **Edit**, at the **Detailed Operations** tab, and add the number of delivered quantities. Then press **Save ► Confirm**.





## Delivery products in multiple orders

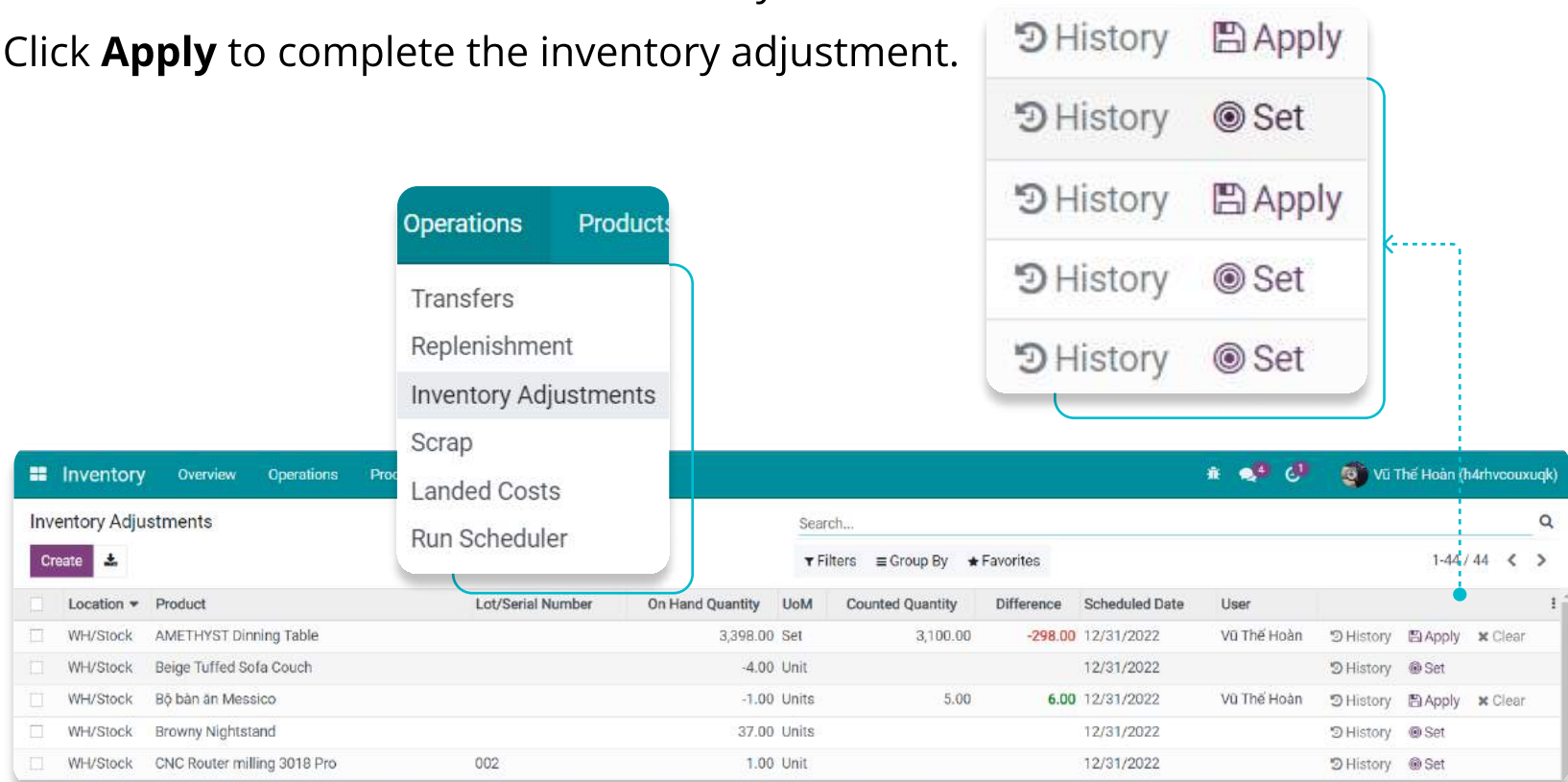
When you deliver your order in multiple deliveries, proceed the similar steps as when you deliver products all at once. However, in **step 2**, after confirming the inventory delivery order, a pop-up window will be displayed, click **Create Backorder** to generate the transfer slip for the rest of your products.



## INVENTORY ADJUSTMENT

When doing the inventory adjustment, go to **Inventory** ▶ **Operations** ▶ **Inventory Adjustments**, and add the actual quantity in the **Counted Quantity** column, the **Difference** amount will be automatically calculated.

Click **Apply** to complete the inventory adjustment.



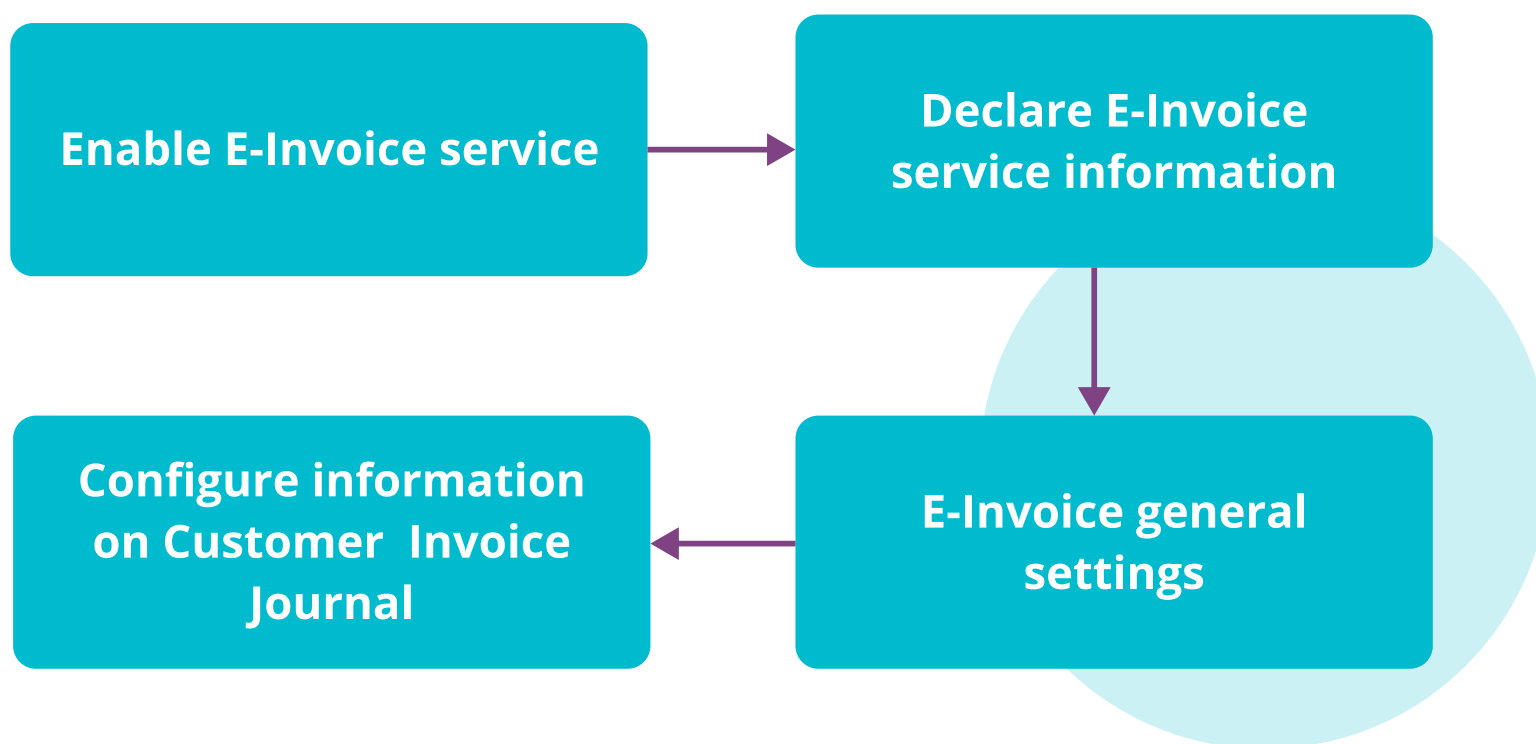
### CREATE AND ISSUE INVOICES

#### Customer invoices

Depending on your business requirements and actual operations, you can:

- *Issue E-invoices:* If your business wishes to integrate with an E-invoice provider supported by Viindoo to issue e-invoices right from the Viindoo software.
- *Issue internal invoices on Viindoo software:* If you only want to monitor internal liabilities on the system or use another platform to issue E-invoices. Refer to the instructions in the [Create customer invoices](#) article.

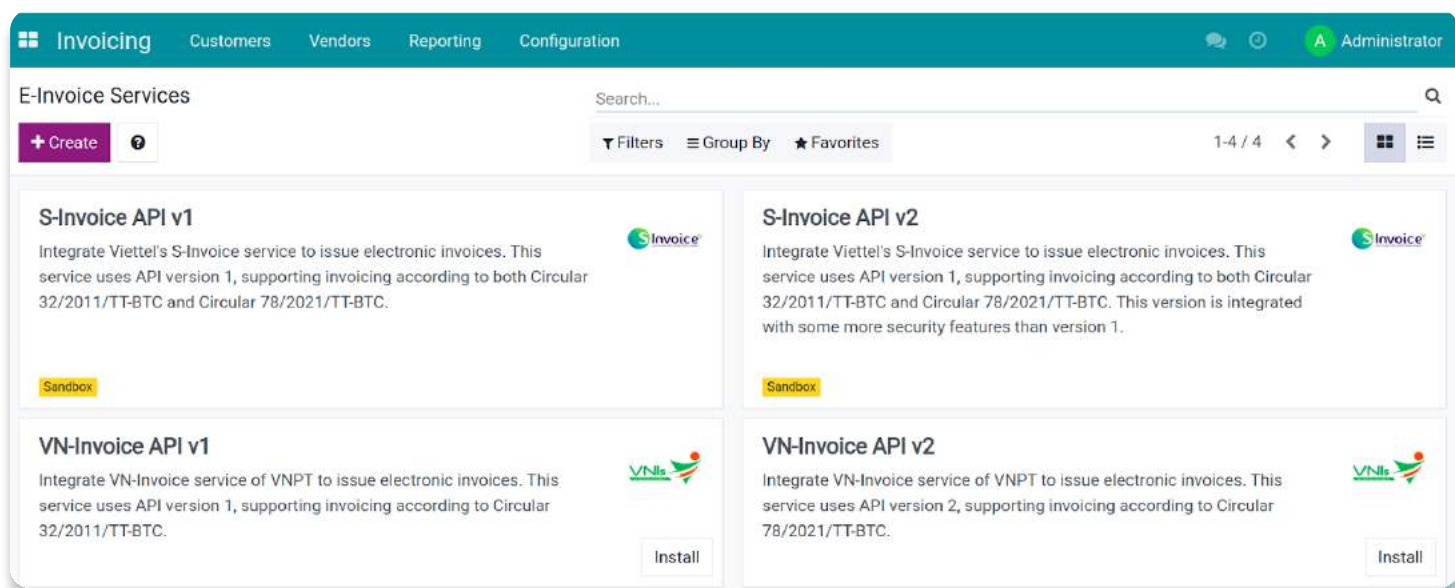
#### Integrate E-Invoice service



#### Step 1: Enable E-invoice service

To use an E-Invoice service, navigate to **Invoicing** ▶ **Configuration** ▶ **E-Invoice** ▶ **E-Invoice Services**:

From here, you will see a list of E-Invoice services supported by Viindoo, including S-Invoice and VN-Invoice (2 versions), click **Install** to use the desired one.

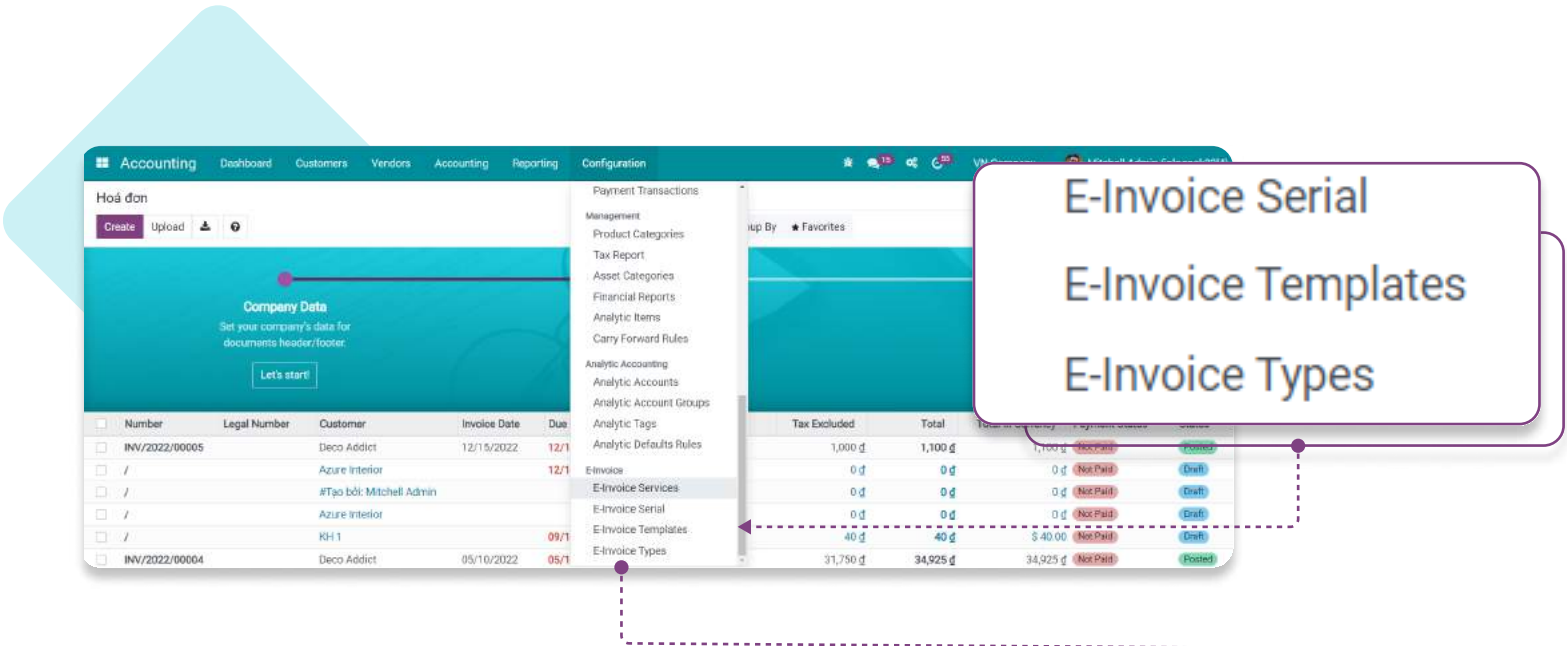


Select the **Production** mode, add the service information for the *API URL*, *Username*, and *Password* fields. This information will be provided either by S-Invoice or VN-Invoice when you register with any of them.

**Step 2: Declare E-Invoice service information**

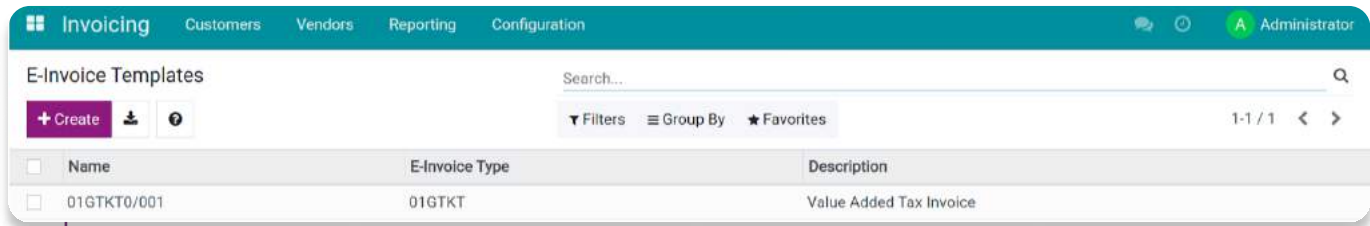
To declare information such as Serial, Templates, and Types, navigate to **Invoicing ► Configuration ► E-Invoices**





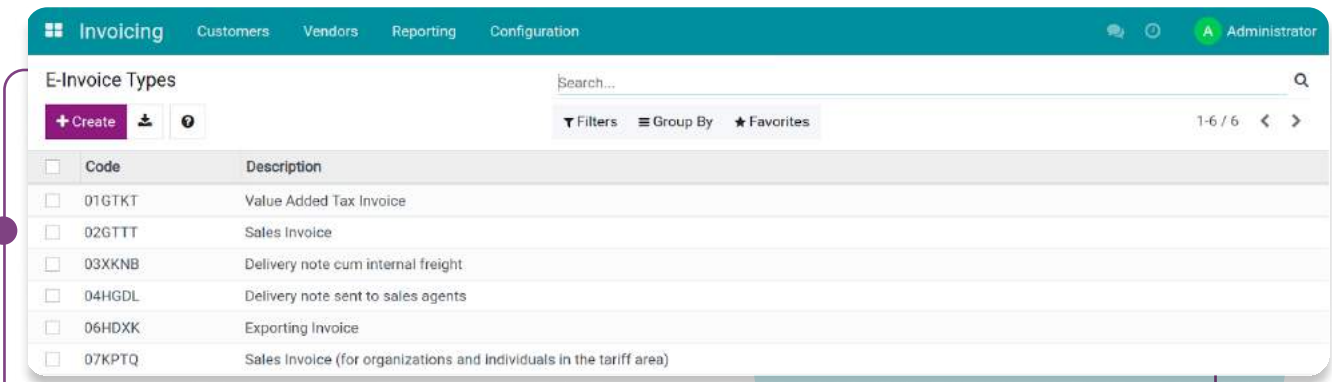
*Declare E-Invoice Types*

Viindoo provides 06 types of E-Invoices available. In addition, you can click **Create** to add a suitable one for your business.



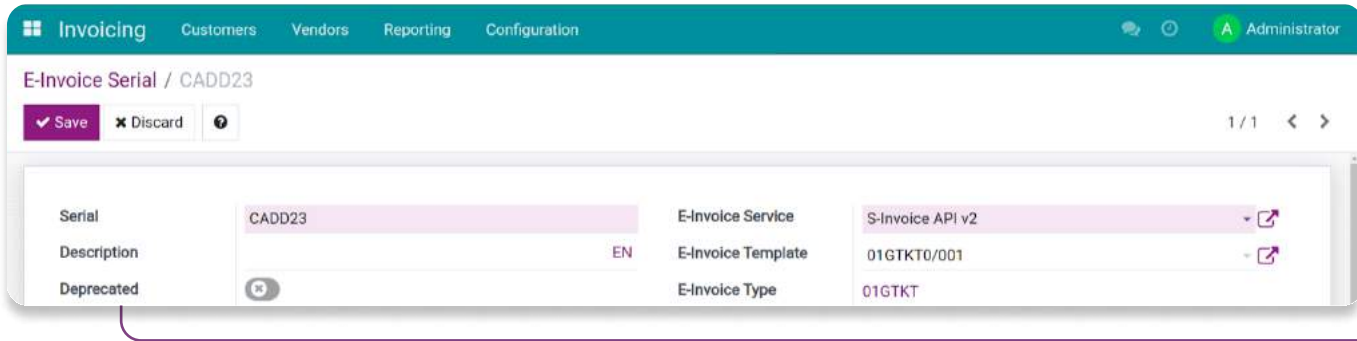
*Declare E-Invoice Templates*

Viindoo has the 01GKT0/001 template available by default. To use another template, click **Create** to add the template that the company registers with the tax authority.

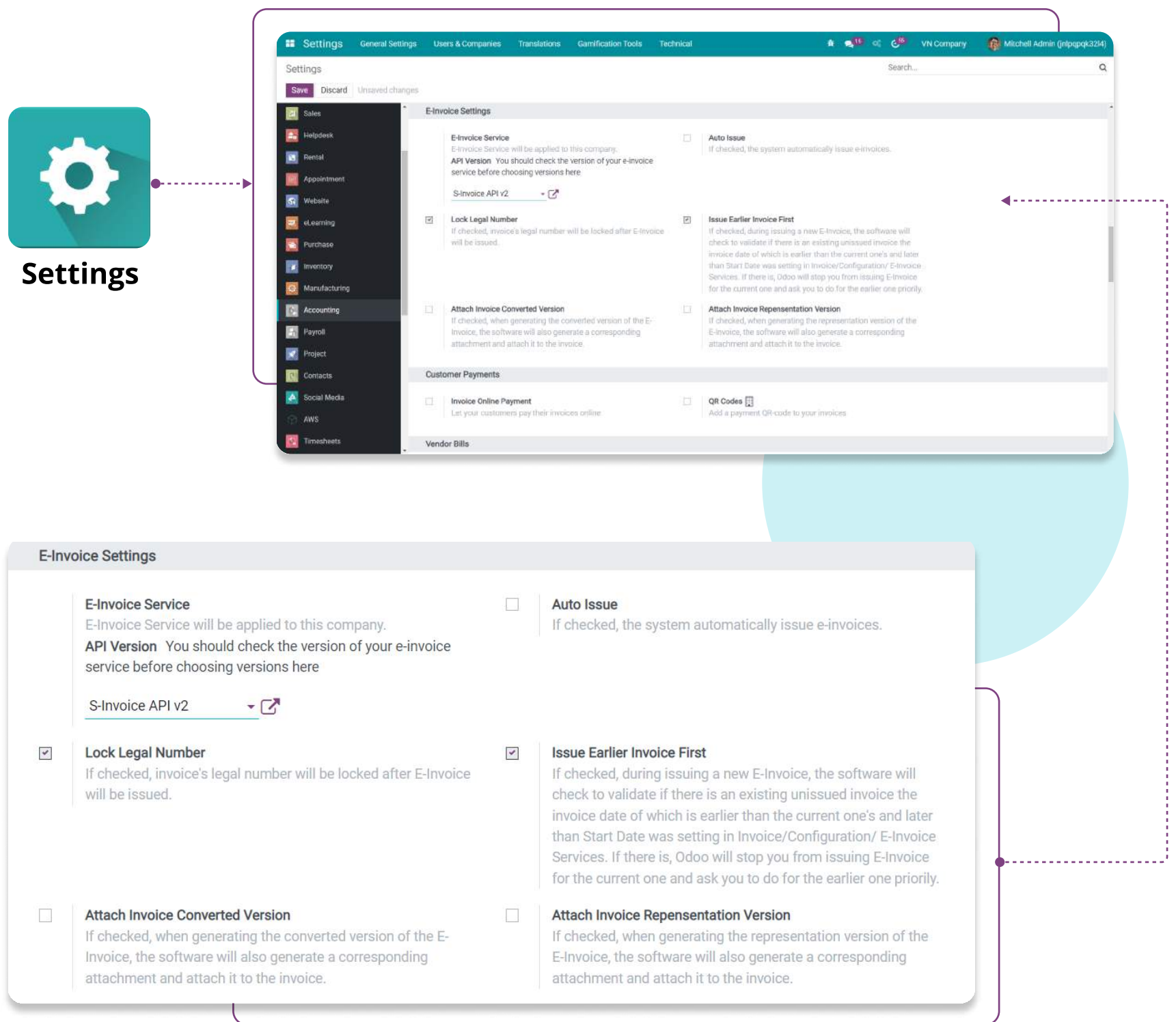


*Declare E-Invoice Serial*

Add the E-Invoice serial number that your business has registered with the tax authority.



### Step 3: E-Invoice general settings



Go to **Settings** and navigate to the **E-Invoice Settings** area.

- **E-Invoice Service:** Select the applicable version.
- Enable features according to your needs, such as:
  - Auto Issue;
  - Lock Legal Number;
  - Issue Earlier Invoice First;
  - Attach Invoice Converted Version;
  - Attach Invoice Representation Version.

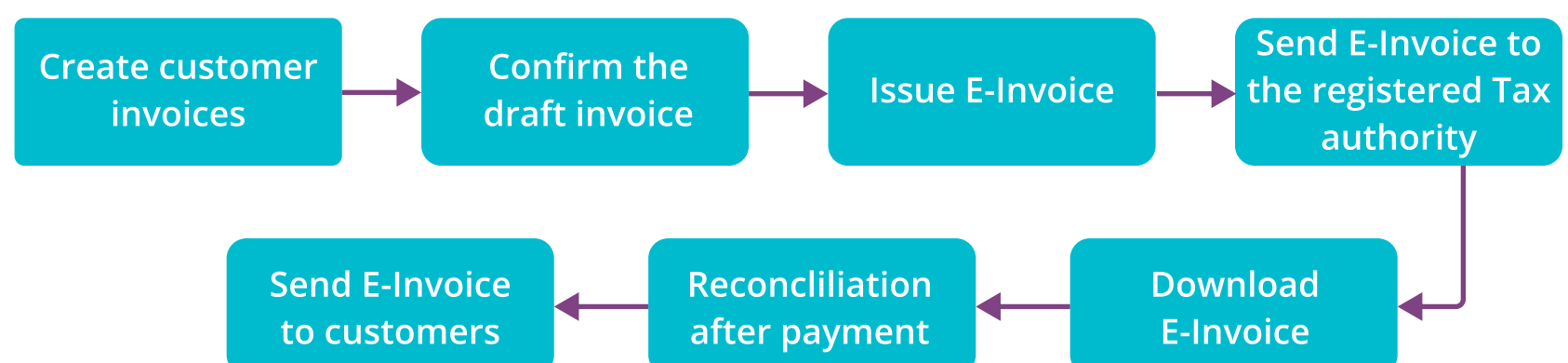
#### Step 4: Configure information on Customer Invoice Journal

Navigate to **Invoicing** ► **Configuration** ► **Journal**, select the **Customer Invoice** journal. In the **E-Invoice Integration** tab, you add the information for the issue of E-Invoices.

The screenshot shows the 'E-Invoice Integration' tab in the 'Customer Invoice' journal configuration. The 'E-Invoice' section includes several settings: 'E-Invoice Disabled' (checkbox), 'Auto Issue' (checkbox), 'E-Invoice Item' (dropdown set to 'Invoice Line Description'), 'Disable Send E-Invoice PDF by email' (checkbox), 'E-Invoice Send Mail/Portal option' (dropdown set to 'Display Version'), 'E-Invoice Serial' (dropdown set to 'K22THS'), 'E-Invoice Template' (dropdown set to '1/100'), and 'E-Invoice Type' (dropdown set to '01GTKT'). A callout box highlights the 'E-Invoice Serial', 'E-Invoice Template', and 'E-Invoice Type' fields.

- *E-Invoice Serial*: The serial that your business registered with the tax authority declared.
- *E-Invoice Template*: The invoice template that your business registered with the tax authority declared.
- *E-Invoice Type*: The invoice type registered and declared in the previous step.

#### Issue E-Invoice



#### ➔ See details at:

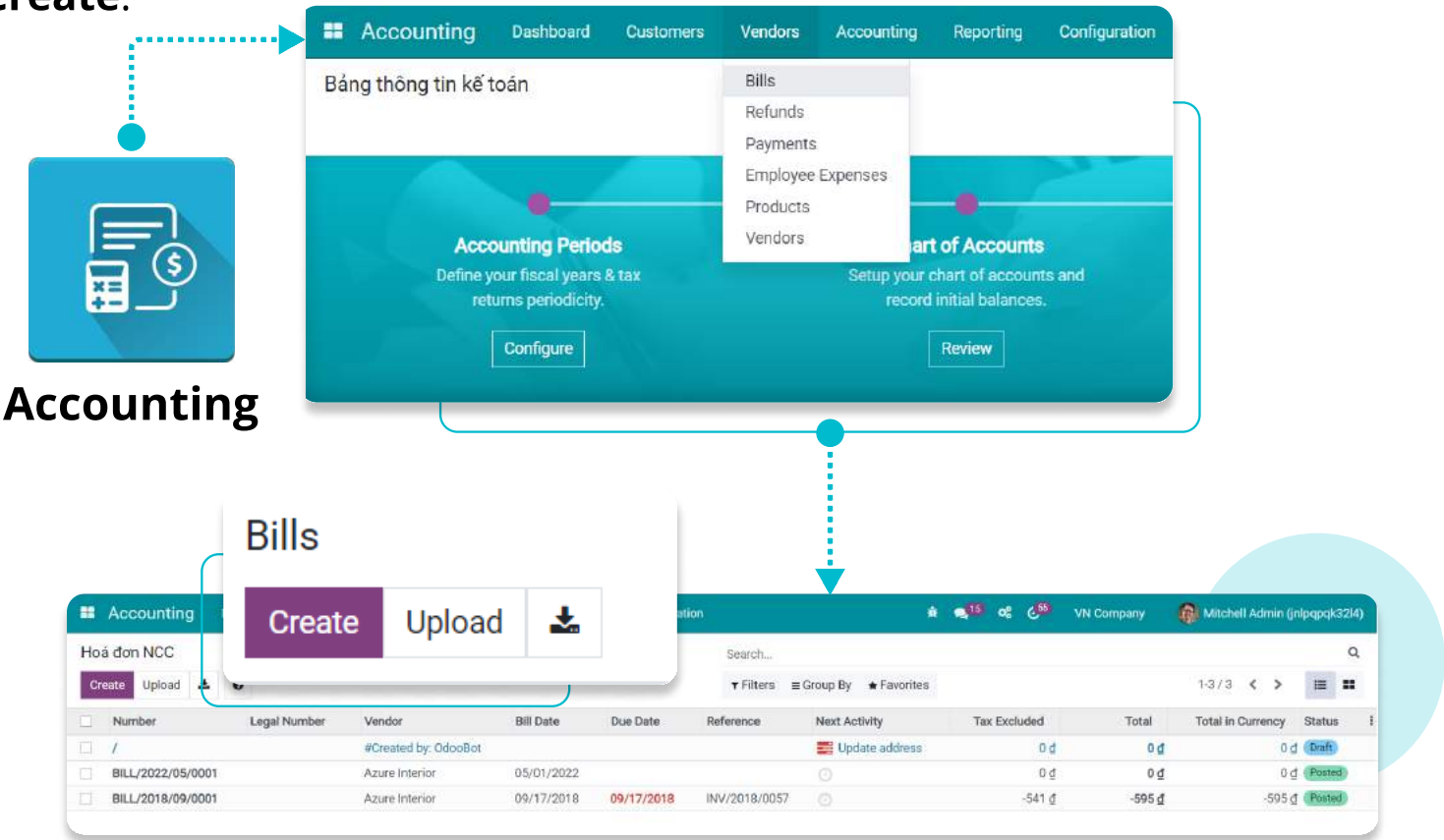
- *Issue e-invoice by integrating Viindoo with Viettel's S-Invoice service.*
- *Issue e-invoice by integrating Viindoo with VN-Invoice service.*



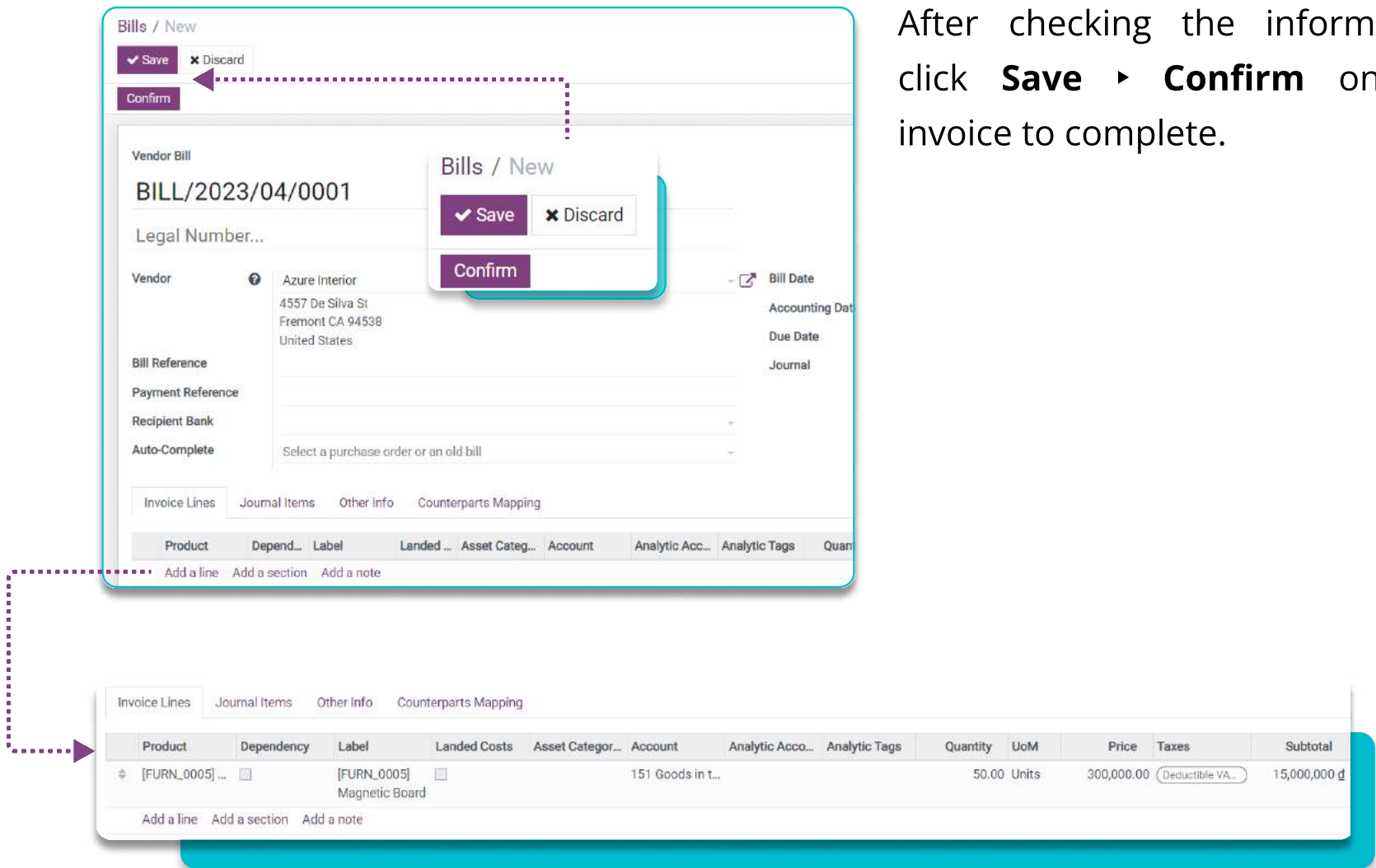
# Vendor Bills

## Create Vendor Bills

Similar to the customer invoices, you also have 02 methods to create vendor bills: create directly from a purchase order or navigate to **Invoicing** > **Vendors** > **Bills**, click **Create**.



A detailed bill interface will be displayed, adding the necessary information such as Legal Number, Vendor, Bill Date, Accounting Date, and Due Date. Click **Add a line** to choose product, quantity and price:



After checking the information, click **Save** > **Confirm** on the invoice to complete.

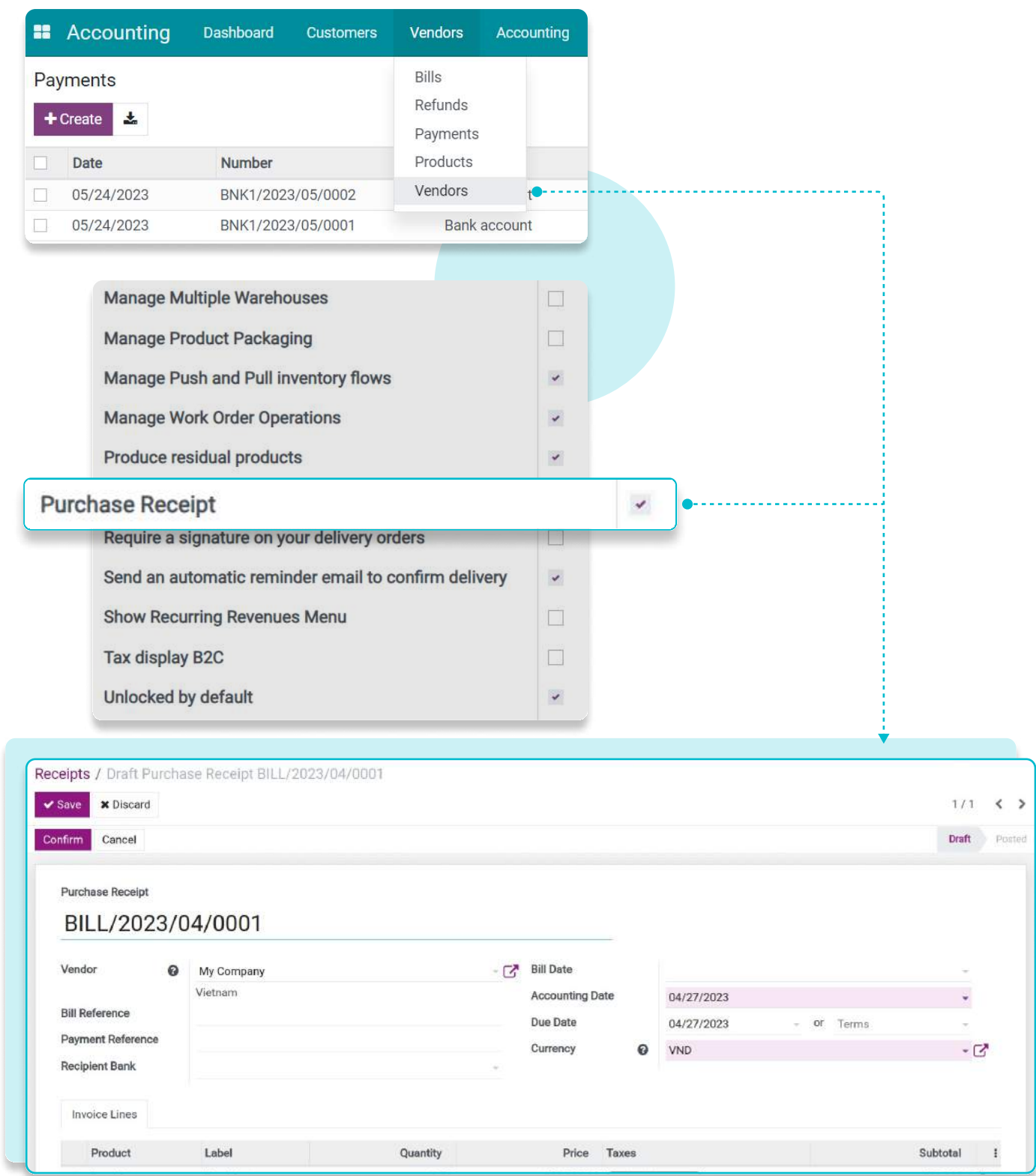
*Record vendor's receipt*

In many cases, businesses may incur expenses for outsourced products or services with low value and only have receipts showing payment. To record these purchase receipts in the software, the accountant can create them from the purchase order or go to **Invoicing** ► **Vendors** ► **Receipt**.

Press **Create** and fill in the similar information as create vendor bill.

**Note**

In order to see the **Receipts** menu. Users need to have the **Purchase Receipt** access right.



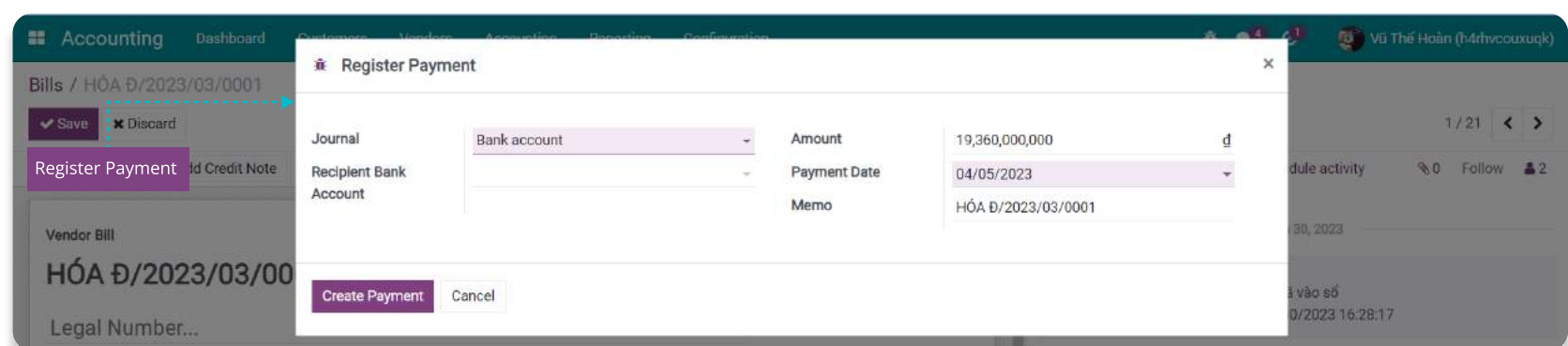
## REGISTER PAYMENT

To register payments in Viindoo, do as follows:

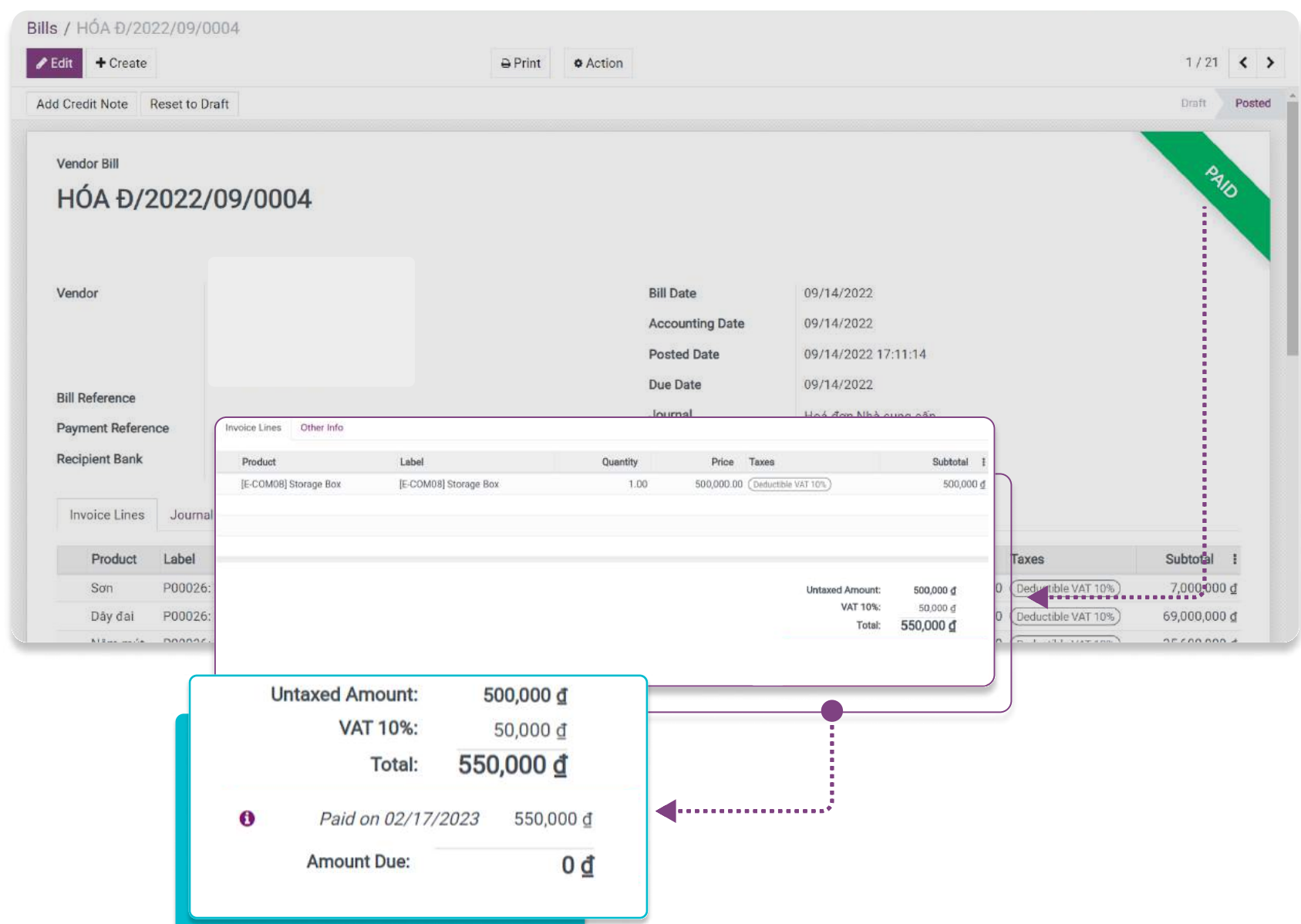
*Step 1:* On any invoice interface in the software, after confirmation, a Register Payment button will appear.

- Select a **Journal** to record the payment amount.
- *Amount:* Type the payment amount for the invoice.
- *Payment Date:* Show the payment date.
- *Memo:* Record the content that reflects the payment transaction.

After filling in the information, press **Create Payment** to record the payment.



*Step 2:* Going back to the invoice, you will see the above payment reconciled directly to the invoice. The invoice is in the **Paid** status.



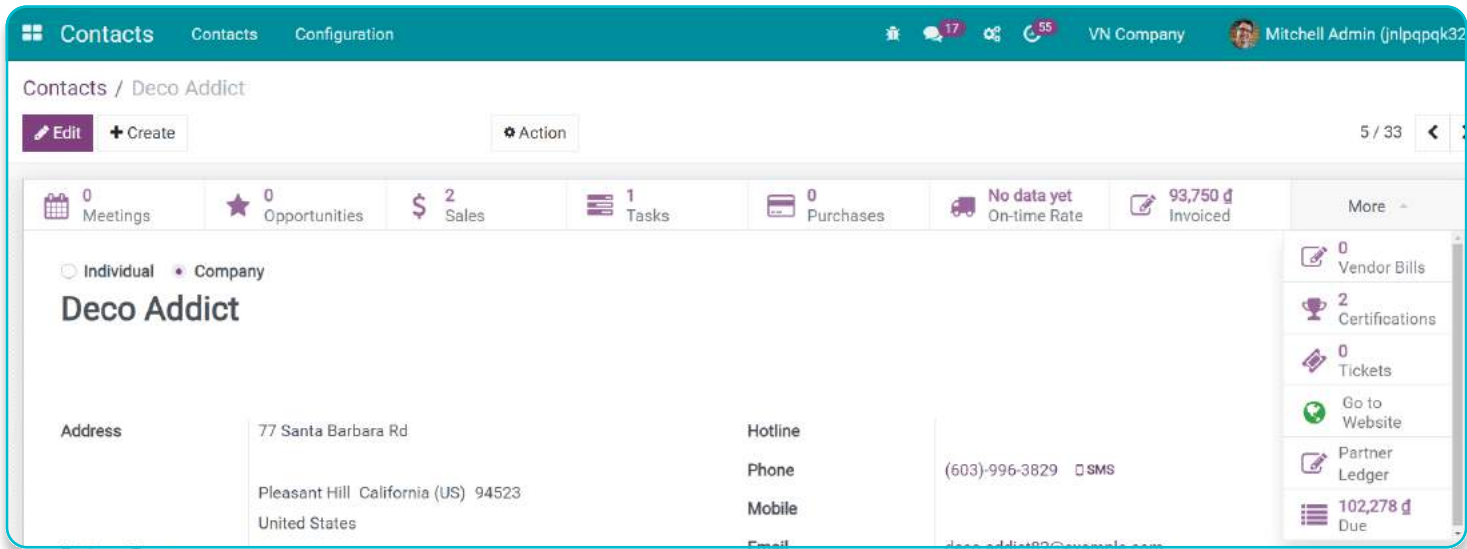
In case you need to register payments for various vendor bills/invoices at the same time in Viindoo

➔ See details at:

- Pay various distinctive bills at the same time.

ACCOUNTING LIABILITIES MANAGEMENT

On a customer or a vendor contact, you can see their invoices and liabilities.



- *Invoiced*: The total value of this partner's confirmed sales invoices. Click to view the invoices list.
- *Vendor Bills*: Quantity of purchase orders with this partner. Click to view the bills list.
- *Partner Ledger*: Click to see the liabilities of the partner.

JRNL	Account	Countered Accounts	Ref	Matching Number	Opening Balance		Arising Amount		Closing Balance	
					Debit	Credit	Debit	Credit	Debit	Credit
▼ Công ty Cổ phần Thương mại Gỗ Phú Quý					0 đ	0 đ	0 đ	19,360,000,000 đ	0 đ	19,360,000,000 đ
2023-03-30 ▼	HÓA Đ	331	1331, 151	HÓA Đ/2023/03/0001	0 đ	0 đ	0 đ	19,360,000,000 đ	0 đ	19,360,000,000 đ
▶ Phan Văn Đoàn					165,000,000 đ	0 đ	0 đ	0 đ	165,000,000 đ	0 đ
Total					165,000,000 đ	0 đ	0 đ	19,360,000,000 đ	165,000,000 đ	19,360,000,000 đ



## VISUAL REPORTS OF BUSINESS PERFORMANCE

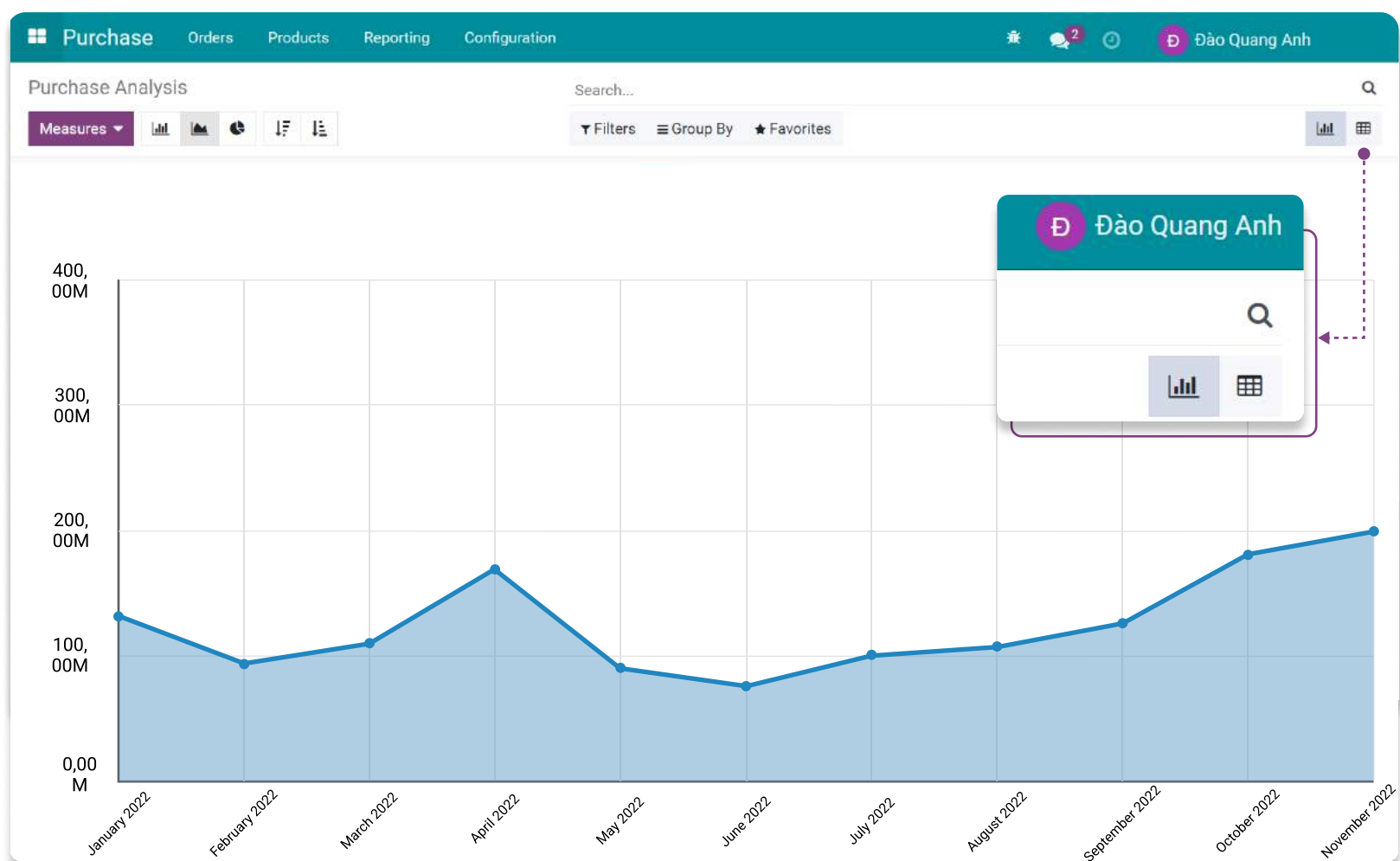
### COMMONLY USED REPORTS


Data on Viindoo software is automatically aggregated into different types of reports. On the software modules, the managers can access the **Reporting** menu to view reports with updated data instantly.

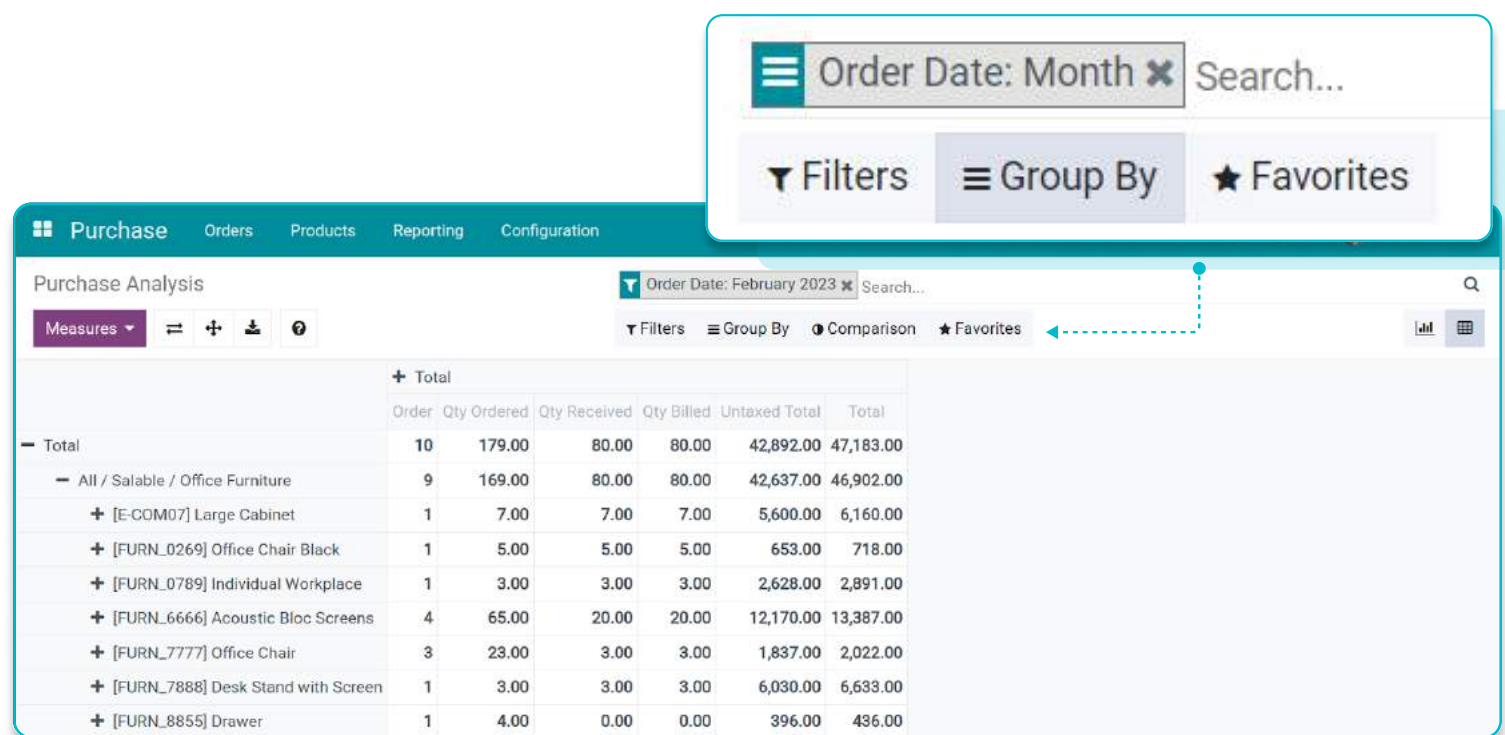


### Purchase report

Go to **Purchase** ▶ **Reporting** ▶ **Purchase**:



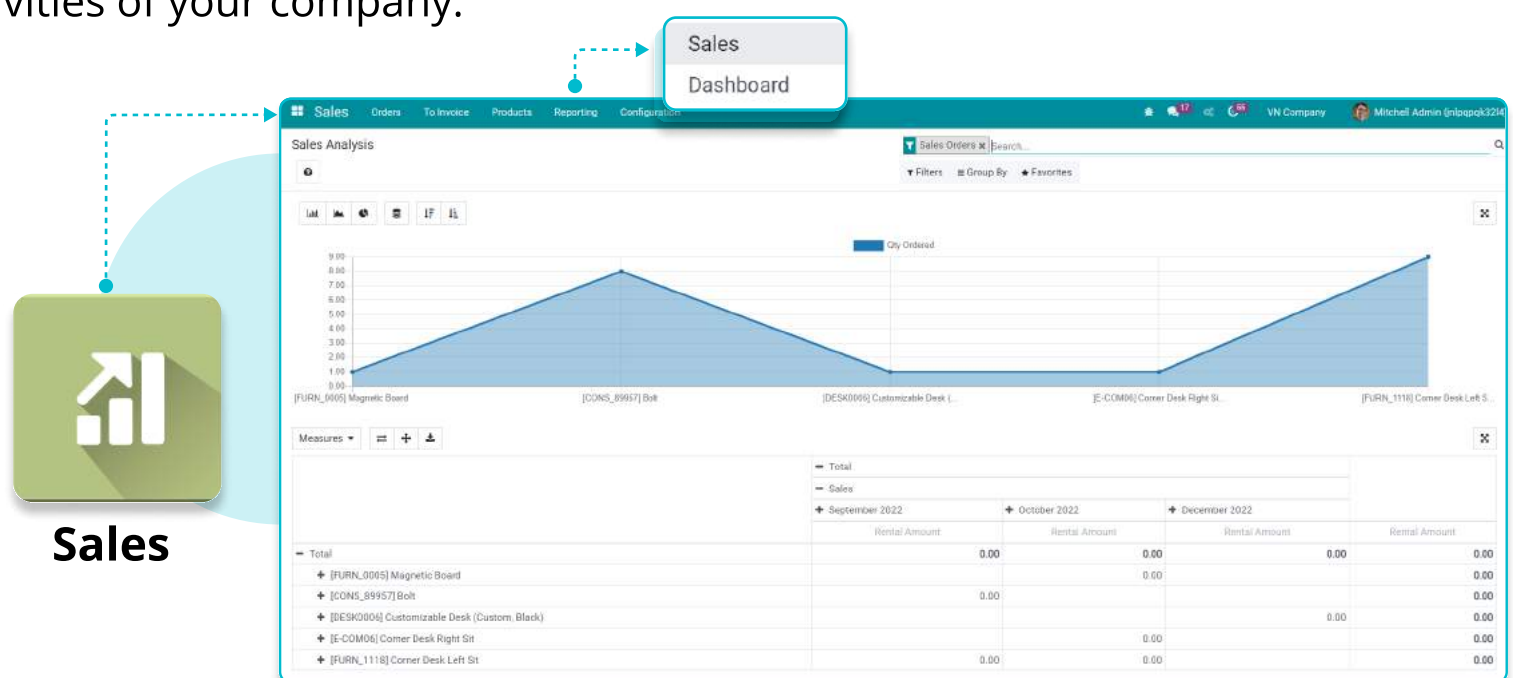
Here, you can view the purchase report as a graph or as a pivot table by clicking the icon  in the right corner of the screen.



On the pivot report interface, you use **Measure** and filter, group tools to filter out the interest information such as the purchased quantity, the actual received quantity, the amount invoiced, and purchase cost in this month, etc.

## Sales report

Go to **Sales** ► **Reporting** ► **Dashboard** to view analytical reports about the sales activities of your company:

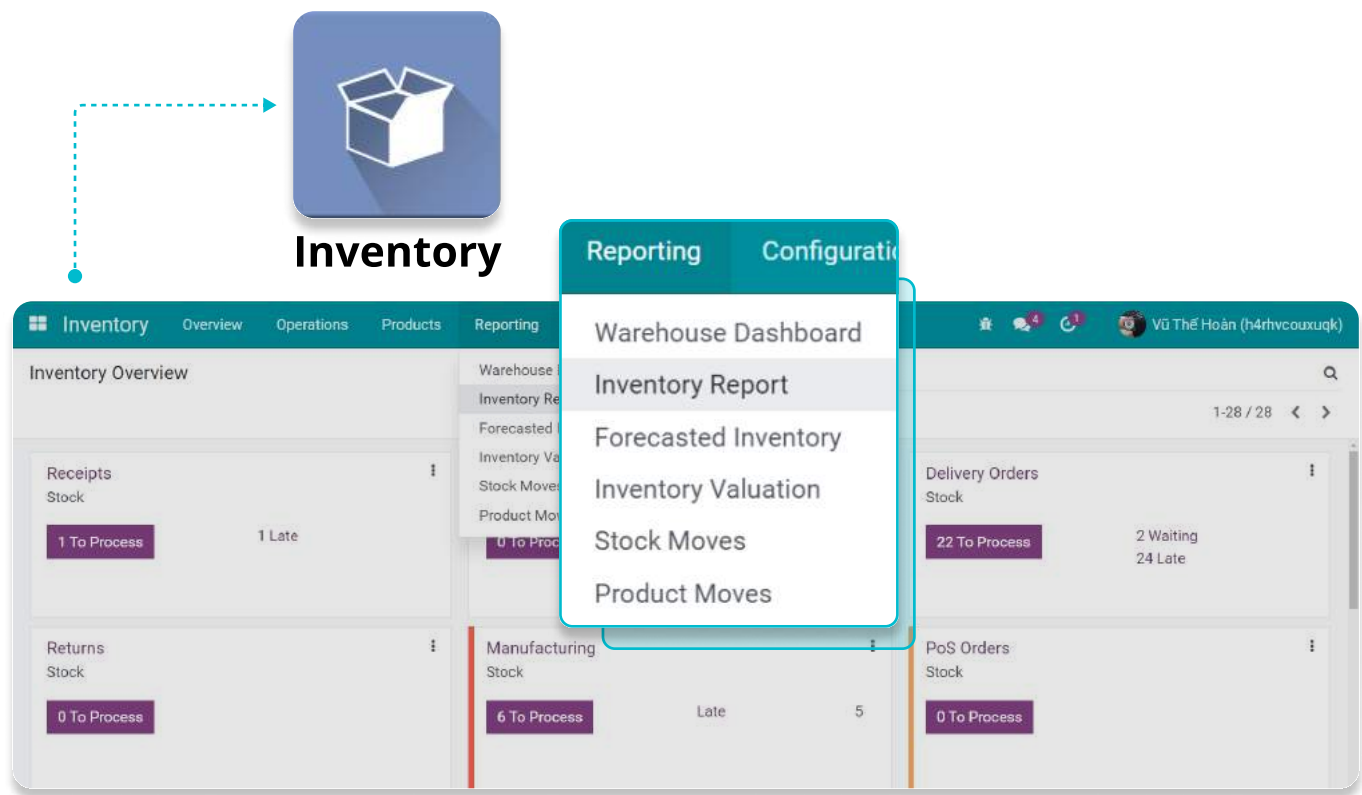


You use tools such as filtering, and grouping to filter out information about the sales activities such as the number of customers, and the generated revenue in the month.



Inventory report

Go to **Inventory** ▶ **Reporting** ▶ **Inventory Report**:

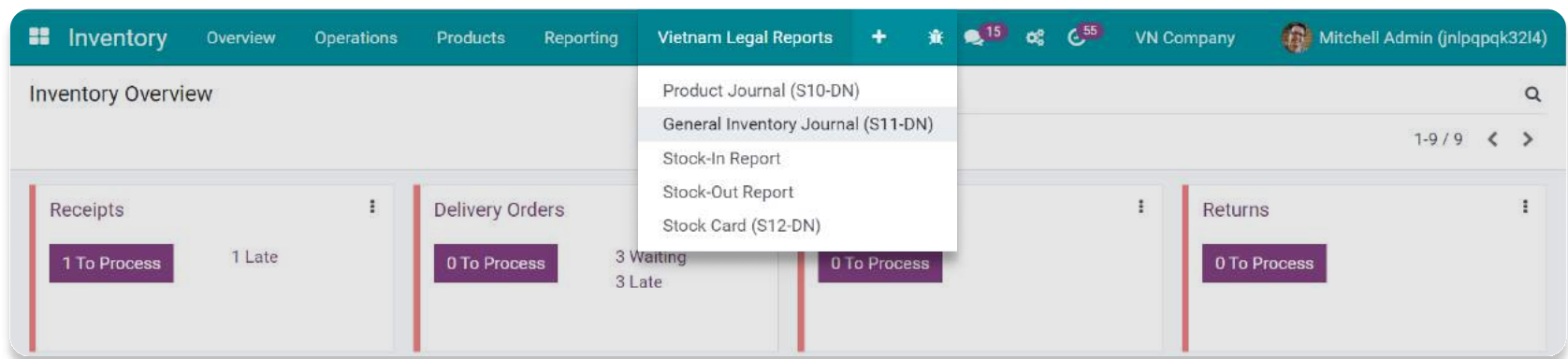


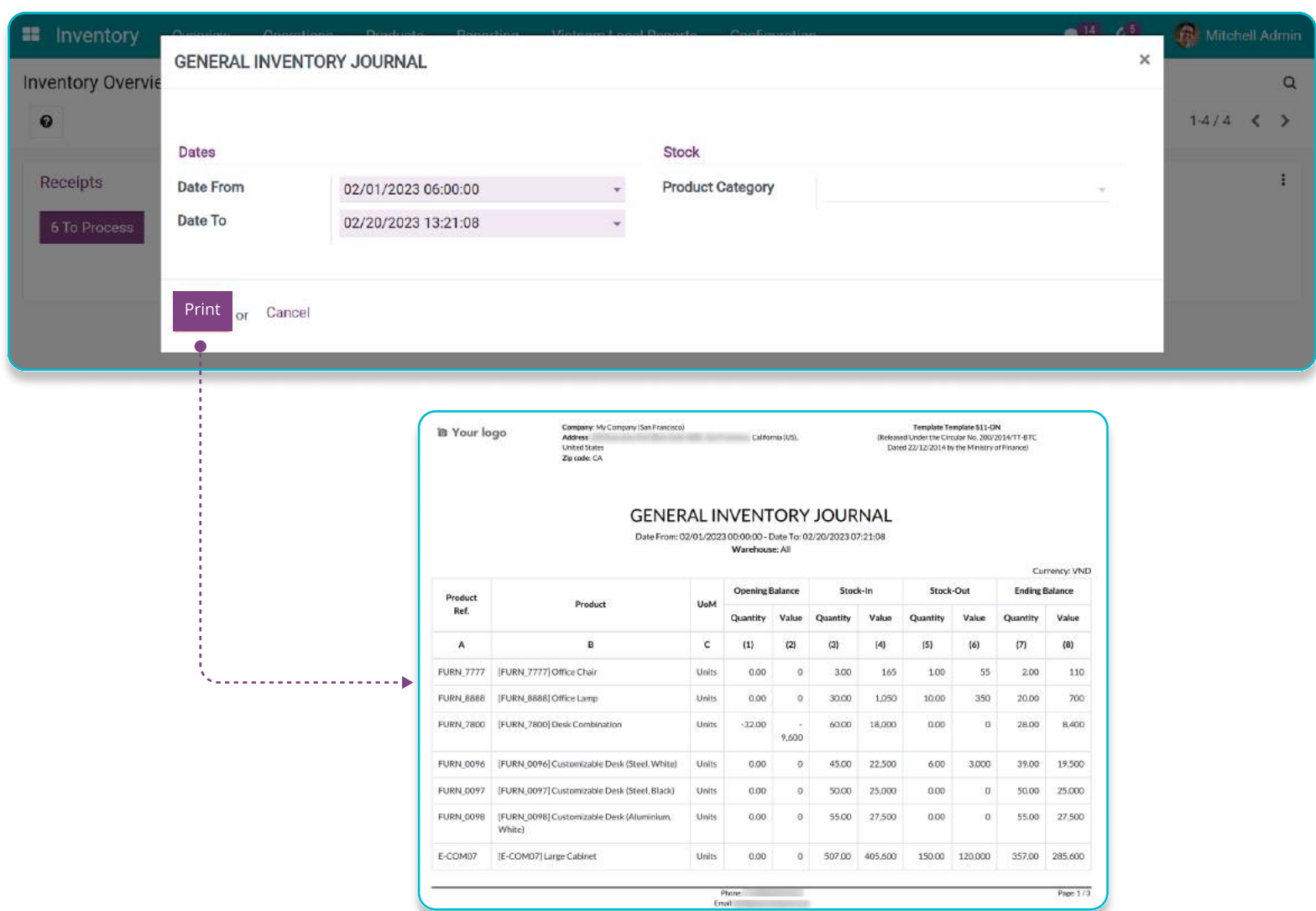
Here, you can view the inventory data of each product on each warehouse location updated instantly:

The screenshot shows the 'Stock On Hand' report. It includes a search bar, filters, and a table with the following data:

Product	Location	Lot/Serial Number	On Hand Q...	Available Q...	Unit of Measure
▶ AMETHYST Dining Table (1)			3,398.00	3,398.00	
▶ Beige Tuffed Sofa Couch (1)			-4.00	-4.00	
▶ Bộ bàn ăn Messico (1)			-1.00	-1.00	
▶ Browny Nightstand (1)			37.00	29.00	
▶ CNC Router milling 3018 Pro (1)			1.00	1.00	
▶ Coffee Table (1)			1,001.00	750.00	
▶ Coffee table legs (1)			6.00	6.00	
▶ Coffee table legs before drying (1)			400.00	0.00	
▶ Coffee table top (1)			4.00	4.00	
▶ Dimond Shaped Mounted Shelf (1)			-6.00	-6.00	

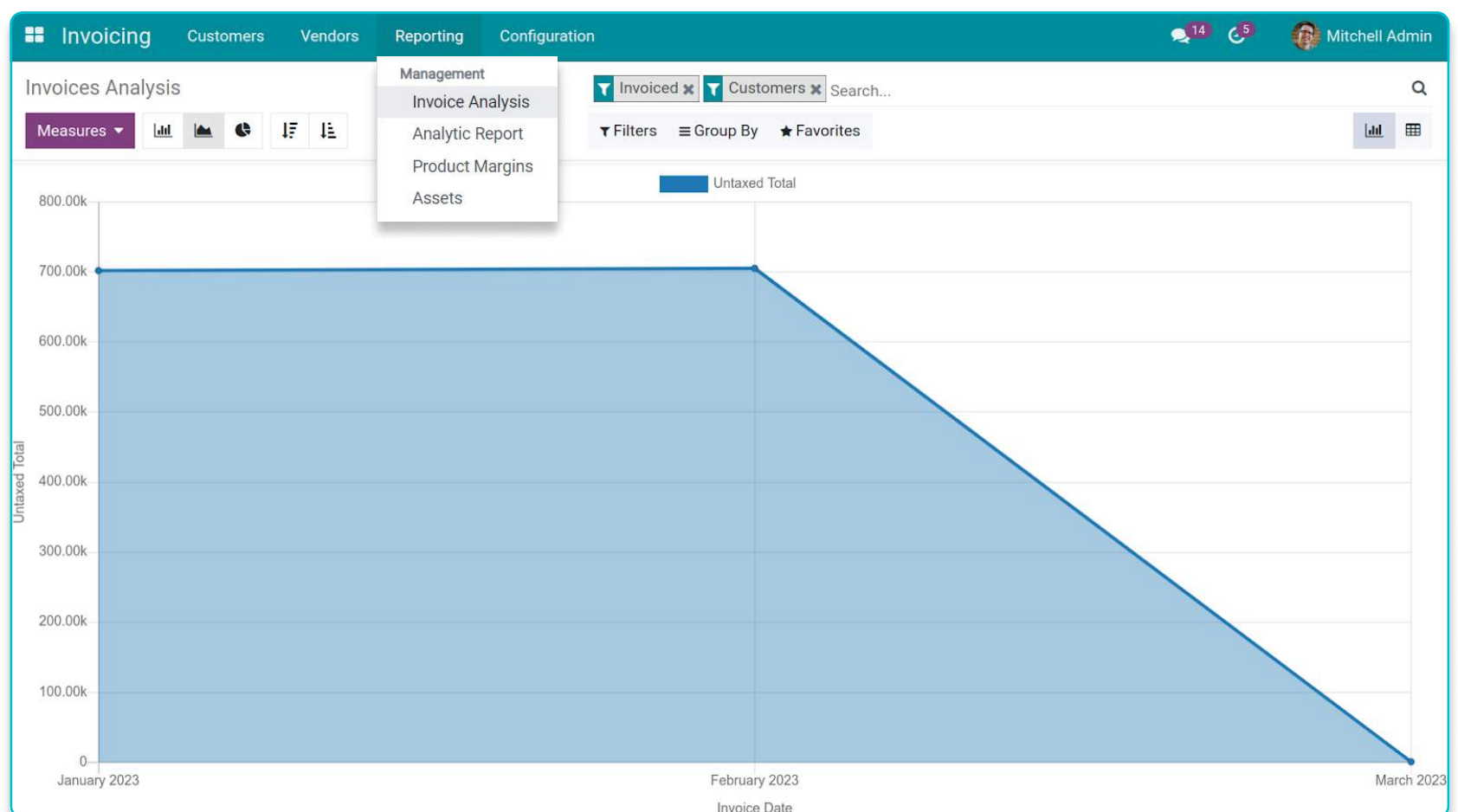
Or you can go to **Inventory** ▶ **Vietnam Legal Reports** ▶ **General Inventory Journal (S11-DN)** to view General Inventory Journal in Vietnam standard:






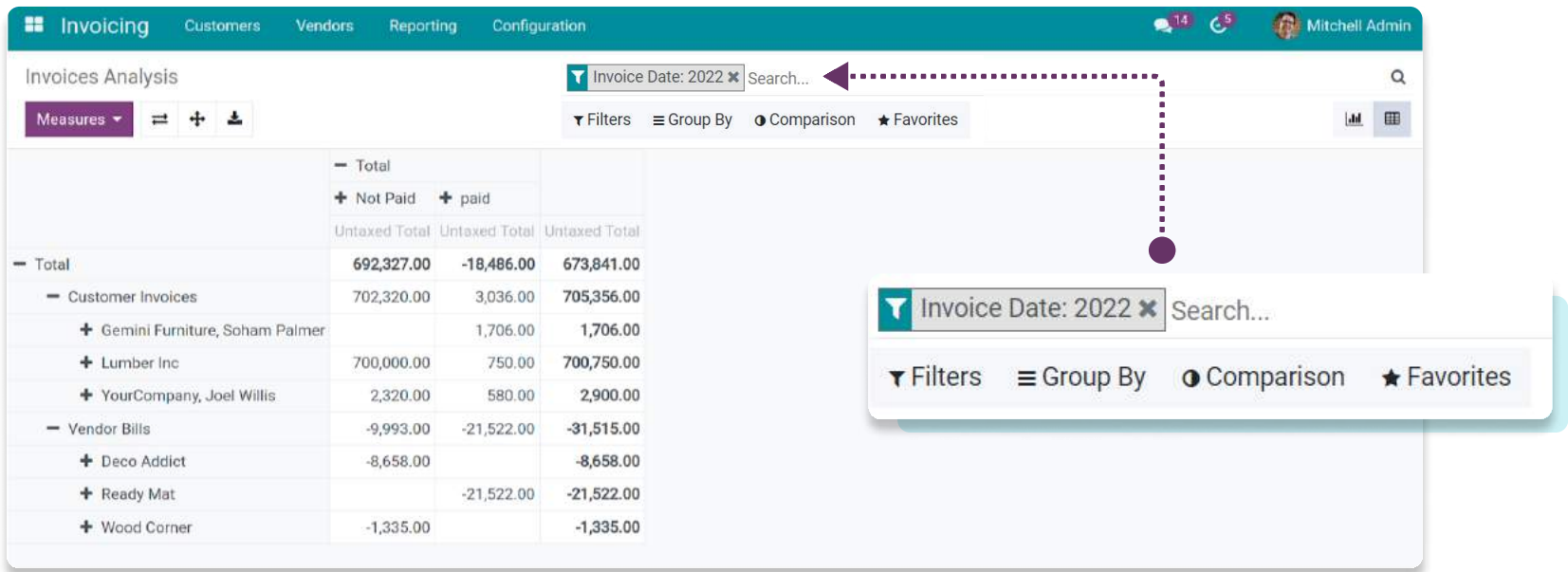
## Invoicing report

Go to **Invoicing** ► **Reporting** ► **Invoices Analysis** to view a summary report about the status of receivables and payables.





Here, you can view the invoices analysis as a graph or as a pivot table by clicking the icon  in the right corner of the screen.

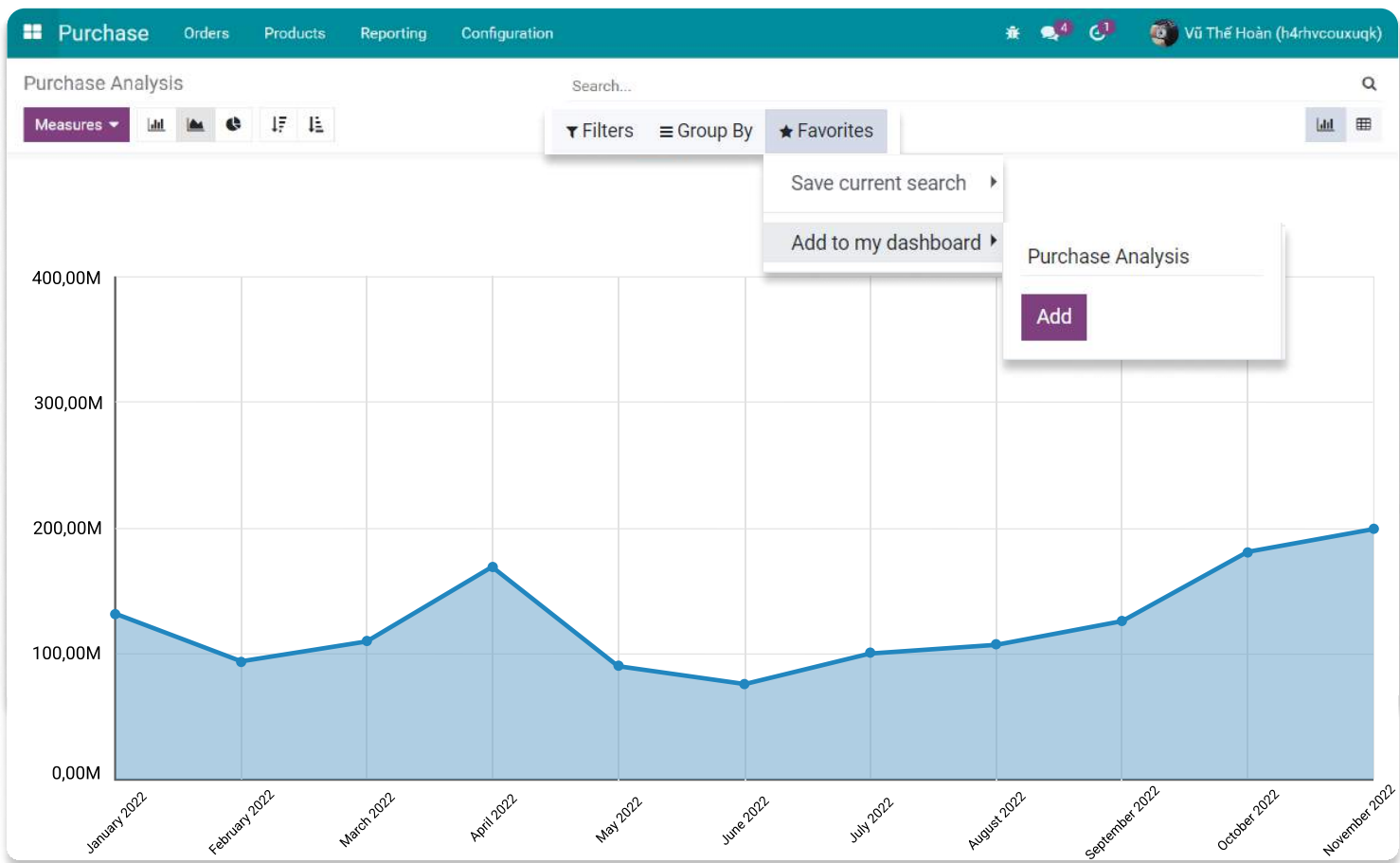


You can use **Measure** and tools such as filtering and grouping to filter out the interest information such as receivables and payables arising in the month with each partner, paid and unpaid amounts, etc.

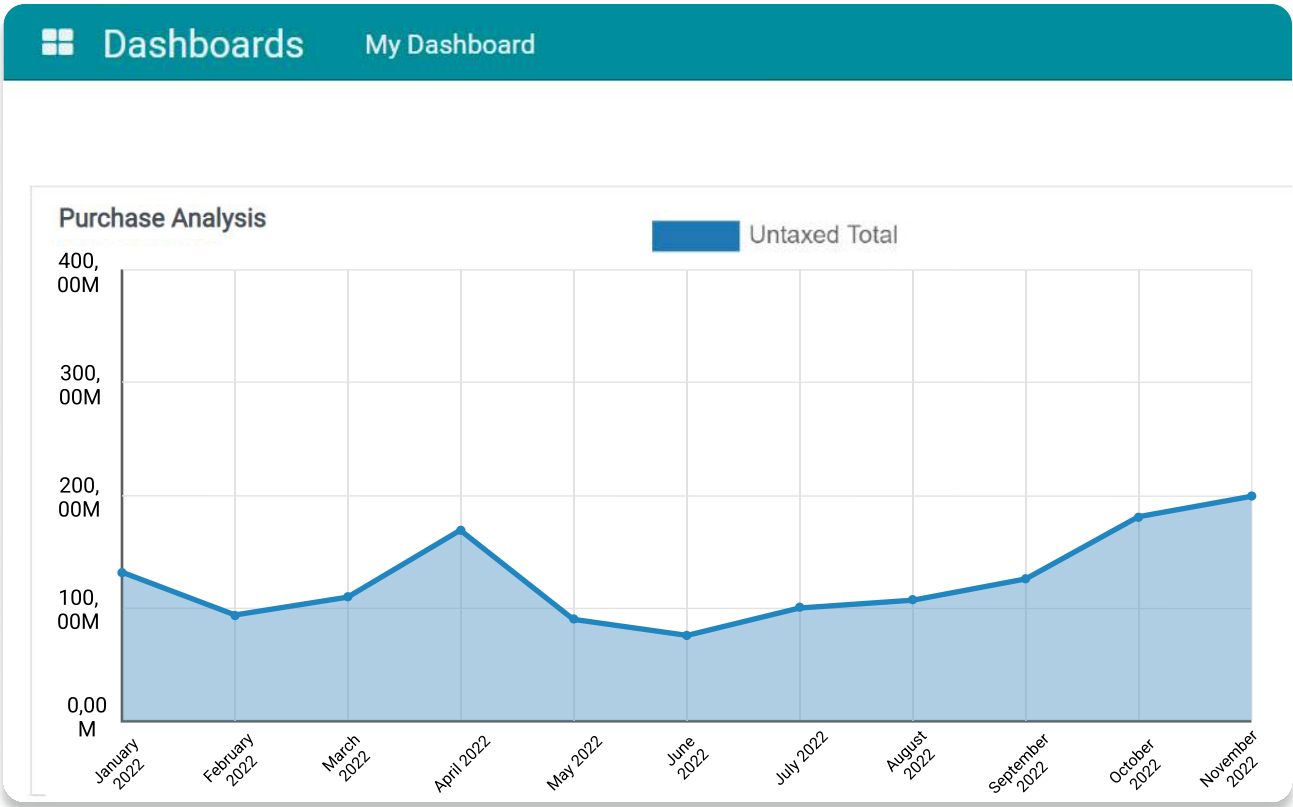
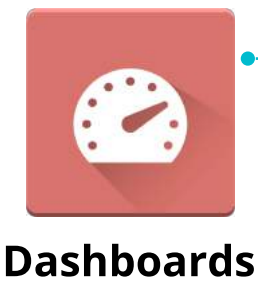
## BUILD YOUR DASHBOARDS

Managers can build a dashboard that includes the reports that they need to view daily to save time.

After filtering, and grouping the data to build a report according to the needed criteria, you select **Favorites** ▶ **Add to my dashboard**, give this report a name, and select **Add** to add it to your dashboard.



The added reports will be gathered in the **Dashboards** application. The data in this dashboard will be updated continuously.





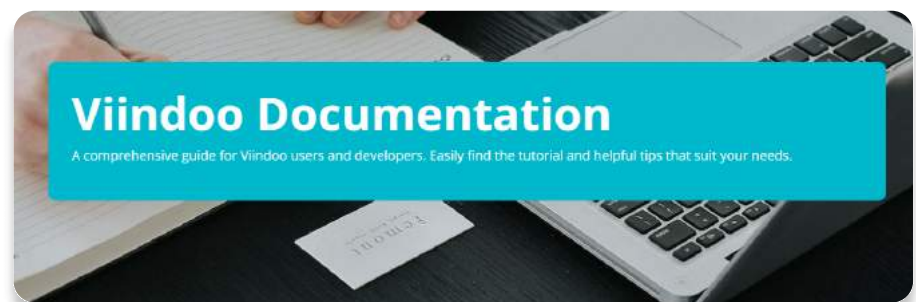
# GUIDELINES CONTACT SUPPORT





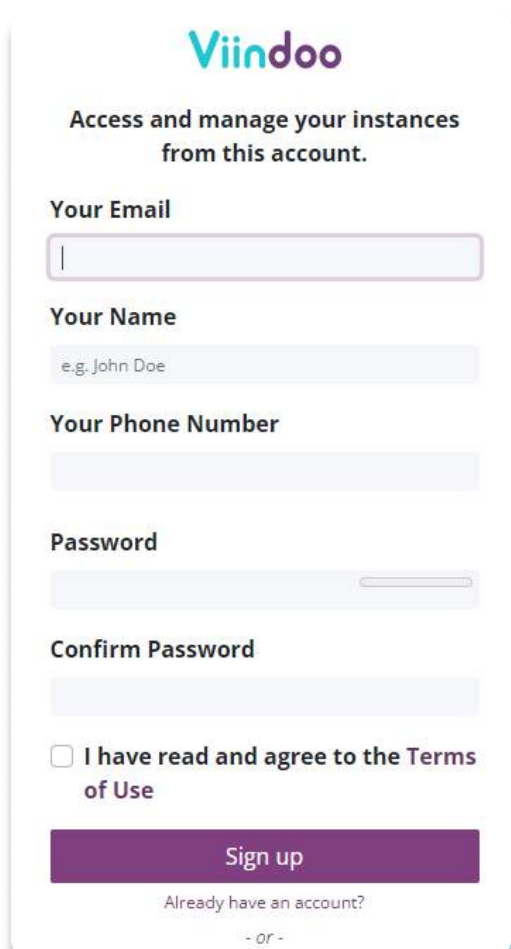
In case you encounter any difficulties while using Viindoo, you can contact the Viindoo Customer Support team as follows:

*Step 1:* Search on the [Forum](#) or [User Documentation](#) for the solution to your problems.



➔ See details at:

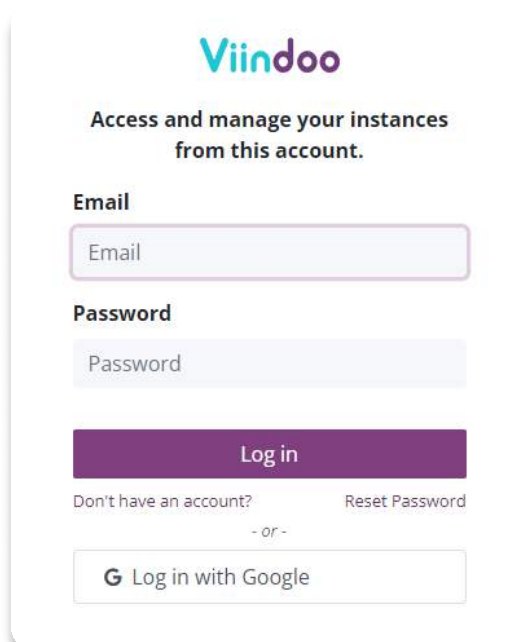
- [Forum](#).
- [User Documentation](#).

A screenshot of the Viindoo sign-up form. It has a teal header with the Viindoo logo. Below the logo, it says "Access and manage your instances from this account." The form includes fields for "Your Email", "Your Name" (with a placeholder "e.g. John Doe"), "Your Phone Number", "Password", and "Confirm Password". There is a checkbox for "I have read and agree to the Terms of Use". At the bottom, there is a purple "Sign up" button and a link "Already have an account?" with a separator "- or -".

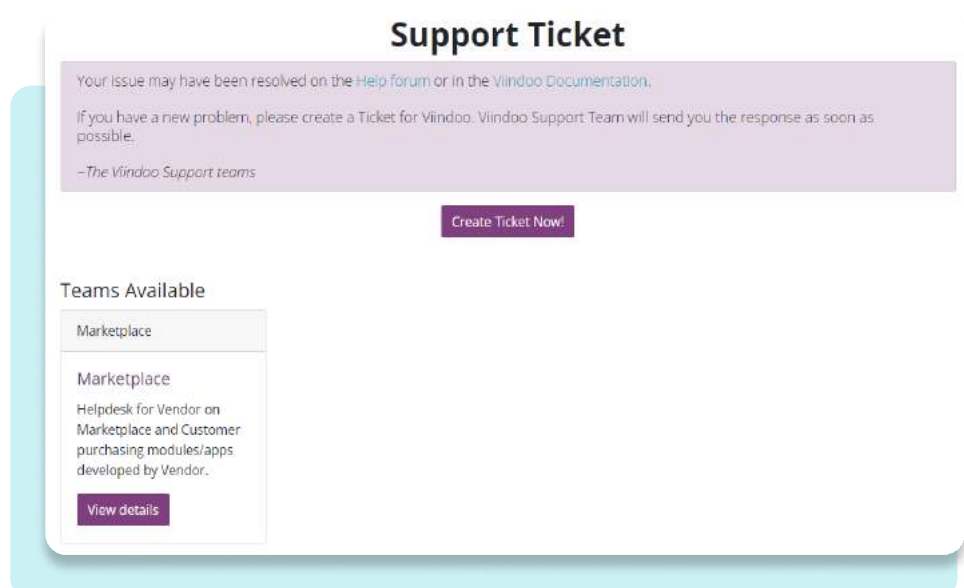
1

*Step 2:* If you still couldn't find an answer to your problem through the documentation, proceed to:

1. [Sign up an account on the Viindoo system](#).
2. [Log in to the Viindoo system](#) with the account you just registered.
3. Go to <https://viindoo.com/ticket>, press **Create Ticket Now**, add a detailed description of your problem then click **Send** to send this ticket to Viindoo.

A screenshot of the Viindoo log-in form. It has a teal header with the Viindoo logo. Below the logo, it says "Access and manage your instances from this account." The form includes fields for "Email" and "Password". At the bottom, there is a purple "Log in" button. Below the button, there are links "Don't have an account?" and "Reset Password", and a separator "- or -". At the very bottom, there is a button "G Log in with Google".

2

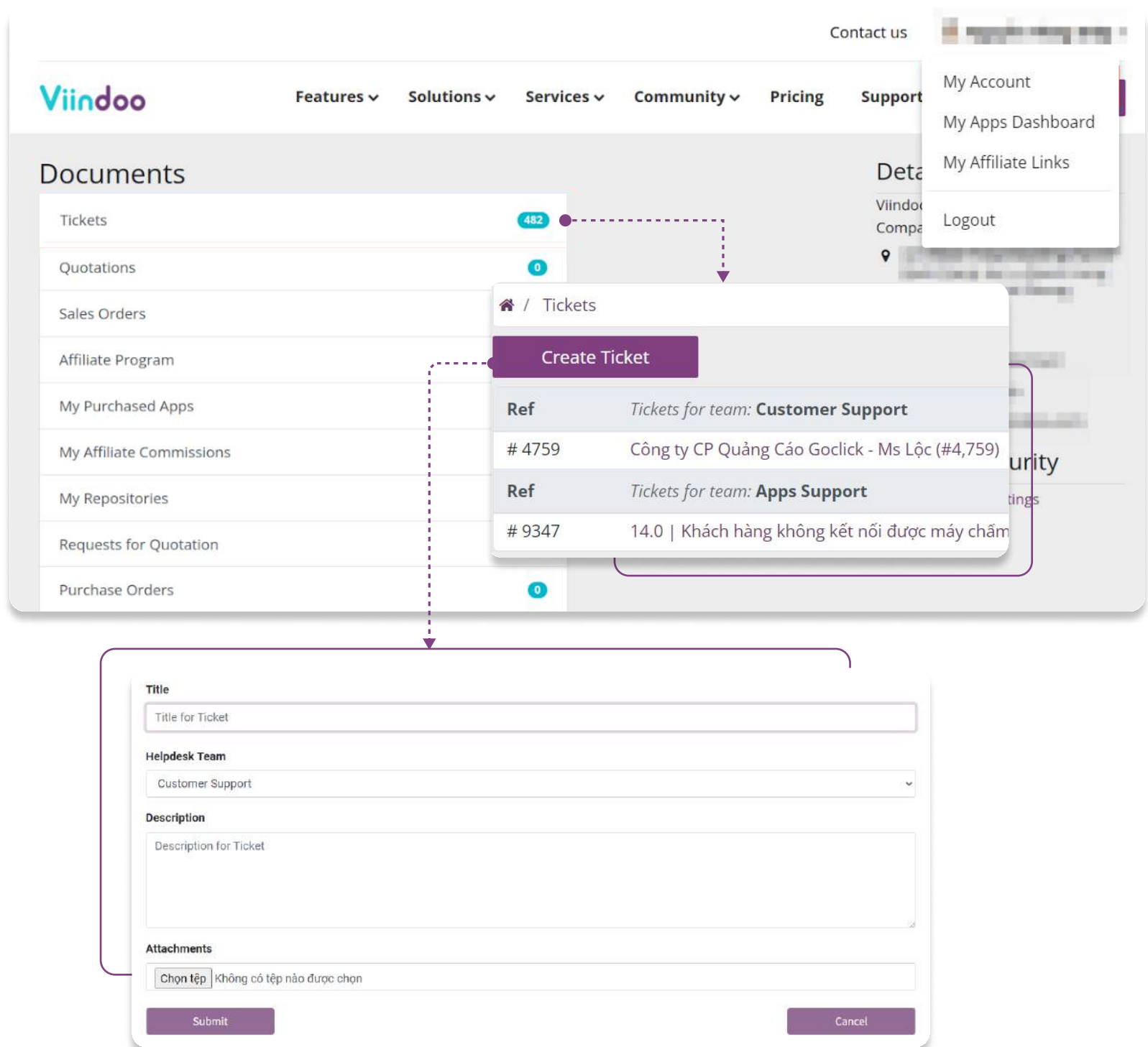
A screenshot of the Viindoo Support Ticket form. It has a purple header with the text "Support Ticket". Below the header, there is a message: "Your issue may have been resolved on the [Help forum](#) or in the [Viindoo Documentation](#). If you have a new problem, please create a Ticket for Viindoo. Viindoo Support Team will send you the response as soon as possible. -The Viindoo Support teams". Below this message is a purple "Create Ticket Now!" button. At the bottom, there is a section "Teams Available" with a table. The table has two rows, both with "Marketplace" in the first column. The second row has a description: "Helpdesk for Vendor on Marketplace and Customer purchasing modules/apps developed by Vendor." and a "View details" button in the third column.

3



Step 3: Search and check the response of your tickets that you have sent to Viindoo by:

- Log in to your Viindoo account.
- Access **My Account** and go to the **Tickets** section.



### ❗ Note

In order to support you as fast as possible, you should provide Viindoo with all the basic information on your support ticket request using the following template:

- **Title:** A summary of the problem.
- **Description:**
  - Precisely describe your issues, describe steps to reproduce the situation.
  - Current behavior of the software.
  - Expected behavior.
  - Attach related images and documents.
  - Avoid non-specific, general content like "the software is faulty", "can't do it", "can't confirm", etc.

Implementing agency: Viindoo Technology Joint Stock Company

Viindoo version: [V15.0]



## VIINDOO TECHNOLOGY JOINT STOCK COMPANY

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