Viindoo

EBOOK - QUICK START GUIDE

QUICK START GUIDE WITH VIINDOO FOR SMALL BUSINESS

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INTRODUCTION

Viindoo introduces the Quick Start Guide to help small businesses (with less than 50 employees) define where to start, what to do, and how to implement the Viindoo Enterprise Management Software for their business.

Depending on the sector and actual requirements, each business will have specific operations adapted to the business model. This document shows you how to perform some common operations in a small business, including:

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. Also, help to reduce the technology cost while improving the operational efficiency and the operational management of the business itself.

PREPARATION

In a small business, the organisational structure starts to be clearly defined with dedicated job positions, roles, and departments. Therefore, having a few employees responsible for technology application in your business is necessary in order to ensure not only reasonable resource usage but also to coordinate collaboration between departments. This team should also be in charge of making a feasible implementation plan without interfering too much with your business's daily operations.

Build an implementation committee → Make an action plan → Define ground rules and evaluate project efficiency

BUILD AN IMPLEMENTATION COMMITTEE

An implementation team should have from 2 to 5 members, including:

- *Team leader:* Should be an influential person, having the right to decide on all issues related to the project, including personnel, process, and financial issues, and report them directly to the Board of Directors. The team leader comes up with the implementation plan, monitors the implementation progress, and communicates the desires, goals, and implementation roadmap to all team members.
- *Coordinator:* Should be a person who can support the team leader by monitoring the progress of the tasks, summarizing the issues affecting the progress, and proposing some ideas or solutions (if any) to the team leader. In addition, the coordinator will perform other tasks such as scheduling meetings for the project, recording the contents of the meeting minutes, and sending them to the team members.
- *Team members:* Should be the representative of each department, mastering the current working process of their department, and being responsible for performing daily operations.

MAKE AN ACTION PLAN

DEFINE THE SCOPE OF WORK

In order to have a realistic software implementation plan, defining the scope of the software deployment is a prerequisite. As a business, you need to ask yourself questions about the current state of your business, such as:

- *What are the main operations of the business?*
- *In each specific operation, what are the problems and difficulties that each department and each position is facing?*

Answering and analyzing these questions will help you get an overview of the health of your business and determine the detailed work that needs to be done to implement the software.

Based on the list above, by the end of the project, your business will be able to assess how much the Viindoo software implementation will solve the current difficulties, how many operations need support from Viindoo's consulting team, or the number of operations that require technical intervention to develop new features to support them.

SCOPES OF WORK

PROJECT — IMPLEMENTATION DURATION

PROJECT MANAGER — TIMELINE

No.	PROCESSES	DESCRIPTION	ISSUES	EXPECTATION	RESPONSIBLE	STATUS
1	Purchase	Departments have needs > Request a purchase > Request for a quotation from providers > Approval from management > Purchase and payment > Receive goods	Filter, search for a purchase with certain provider for a comparison		John S.	New
2			Store documents, certificates of origin, of quality, etc. related to a PO			In-progress
3			...			Done
4						Cancelled
5			...			
6						

See details at:

- *Example list of processes, tasks and analysis for a software implementation.*

DETAILED PLANNING

At the project kick-off, the general implementation plan is the guideline, helping the team leader keep everything on track before implementation. This project plan contains all the necessary details of the project, such as objectives, the scope of work, tasks, assignees, deadlines, etc., which gives stakeholders an overview roadmap of the implementation project, ensures adequate resources, and holds everyone accountable from the start.

Next, the implementation team needs to make a checklist of all the tasks that need to be done. With this list, team members will be proactive in their work and allocate resources accordingly.

IMPLEMENTATION PLAN

PROJECT				IMPLEMENTATION DURATION	10		Weeks							
PROJECT MANAGER				FROM	12-Dec-2022		TO		25-Feb-2023					
No.	CONTENT	EXPECTED OUTPUT	RESPONSIBLE	STATUS	MILESTONES	WEEK								
						1 12/12 - 17/12	2 19/12 - 24/12	3 26/12 - 31/12	4 03/01 - 07/01	5 09/01 - 14/01	6 16/01 - 28/01	7 30/01 - 04/02		
1	**Project Preparation (2 weeks)**													
1.1	*Project Objective*			New										
1.2	*Establishing project committee*			In-progress										
1.3	*Project Kick-off*			Done										
2	**Planning (2 weeks)**													
2.1	List of the scope of work, process and operations	List												
2.2	*Analyzing Master data*													
2.3	*Proposing project measurement tools*	Tools & How to use them												
2.4	*Communication process*													
2.3	*Budget proposal*	Budget proposal												
3	**Implementation & Monitor (4 weeks)**													
3.1	System settings													
3.2	Install apps													
3.3	*Data processing*													
3.4	*Performing*													
3.5	*Handling issues*													

➡ **See details at:**

- *List of to-do tasks during the implementation*.

DEFINE GROUND RULES AND EVALUATE PROJECT EFFICIENCY

DEFINE GROUND RULES

During the implementation, team members should hold daily meetings at a fixed place and time of the day (should not be longer than 15 minutes) to update the current progress of the project by answering the following questions:

- *What has been done yesterday?*
- *What will be done today?*
- *Are there any obstacles, or difficulties? What are the solutions for these issues?*

We recommend using the Project app in the Viindoo software to monitor and optimize the implementation progress. To learn how to work with this app, check out the Project Management (Page 36).

DEFINE HOW TO EVALUATE PROJECT EFFICIENCY

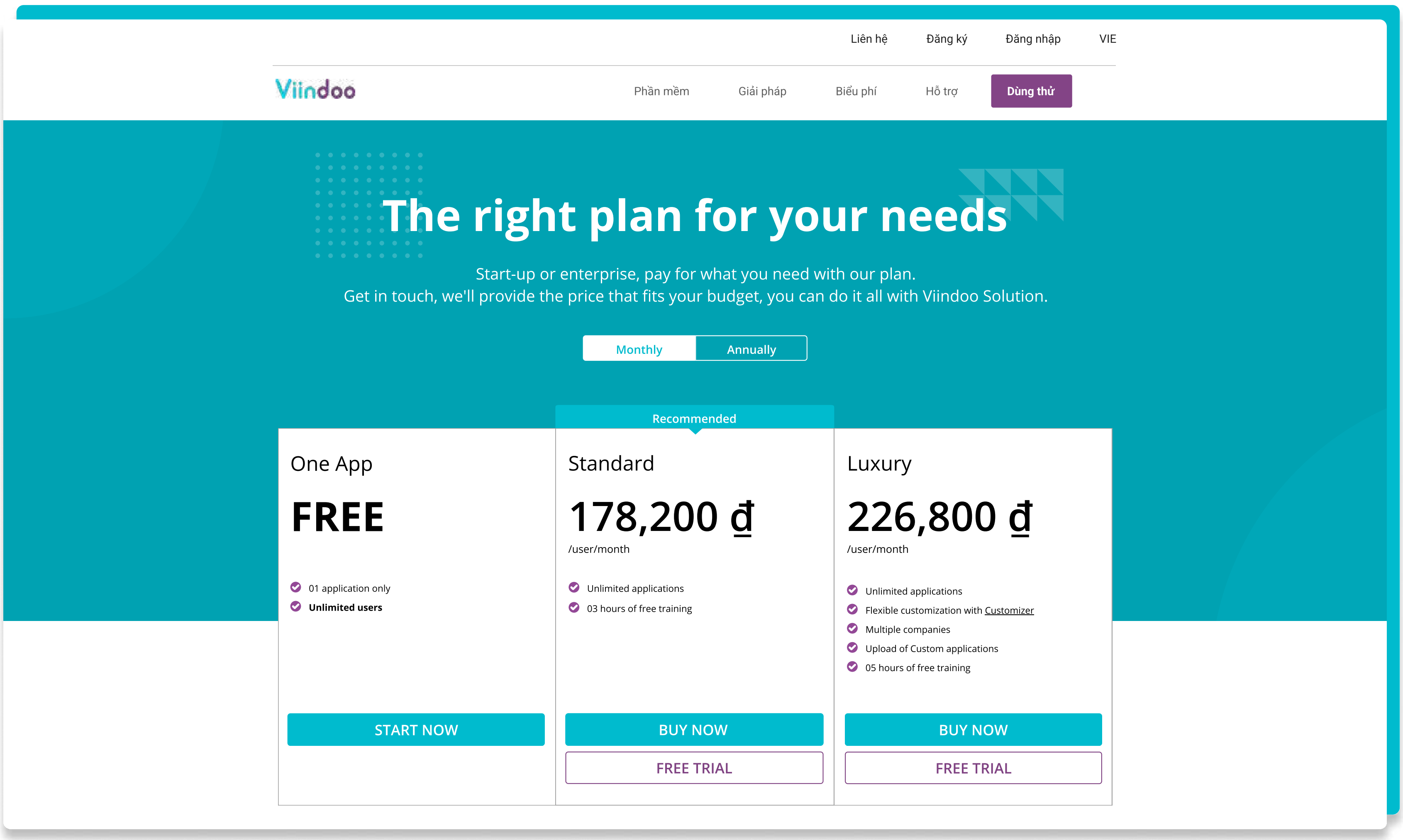
Members of the Viindoo software implementation team should be aware of their roles and responsibilities in the team. Implementation tasks might affect their main daily tasks in the company for a certain period of time; therefore, it's important to encourage the spirit of your team members. For example, you can set up some rewards or penalties for this special project, which should be approved by the management team.

In addition, to ensure a successful software implementation, you should test the software knowledge of the project members before going live with the official instance.

GETTING STARTED WITH VIINDOO

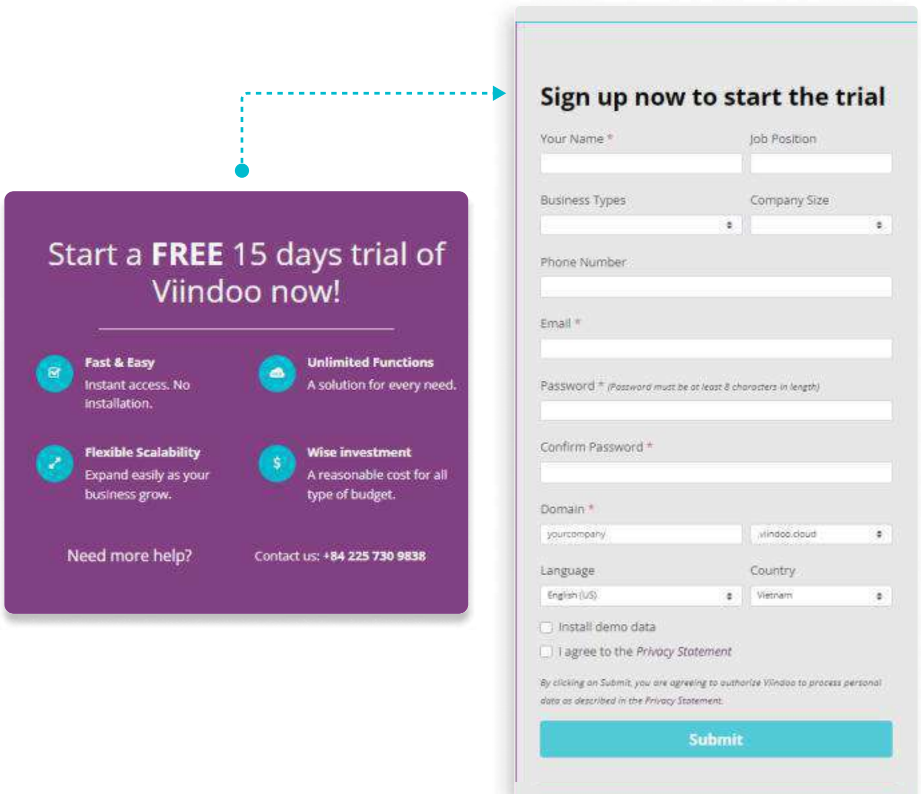
CREATE A NEW INSTANCE

Access the Viindoo pricing page at https://viindoo.com/pricing to create a new instance for your business.



Press **Buy Now** to create an official instance, you will be redirected to the payment page to finish the payment process. Or click on **Try Now** to create a demo instance and test it out for 15 days. Viindoo provides a free domain for each instance, you can create one with your domain of choice.

➡ e.g: your-company.viindoo.cloud.



➡ **See details at:**

- *[Steps to create Viindoo Instance](#).*

Once the registration is a success, you will be redirected to the overview interface to start using Viindoo:

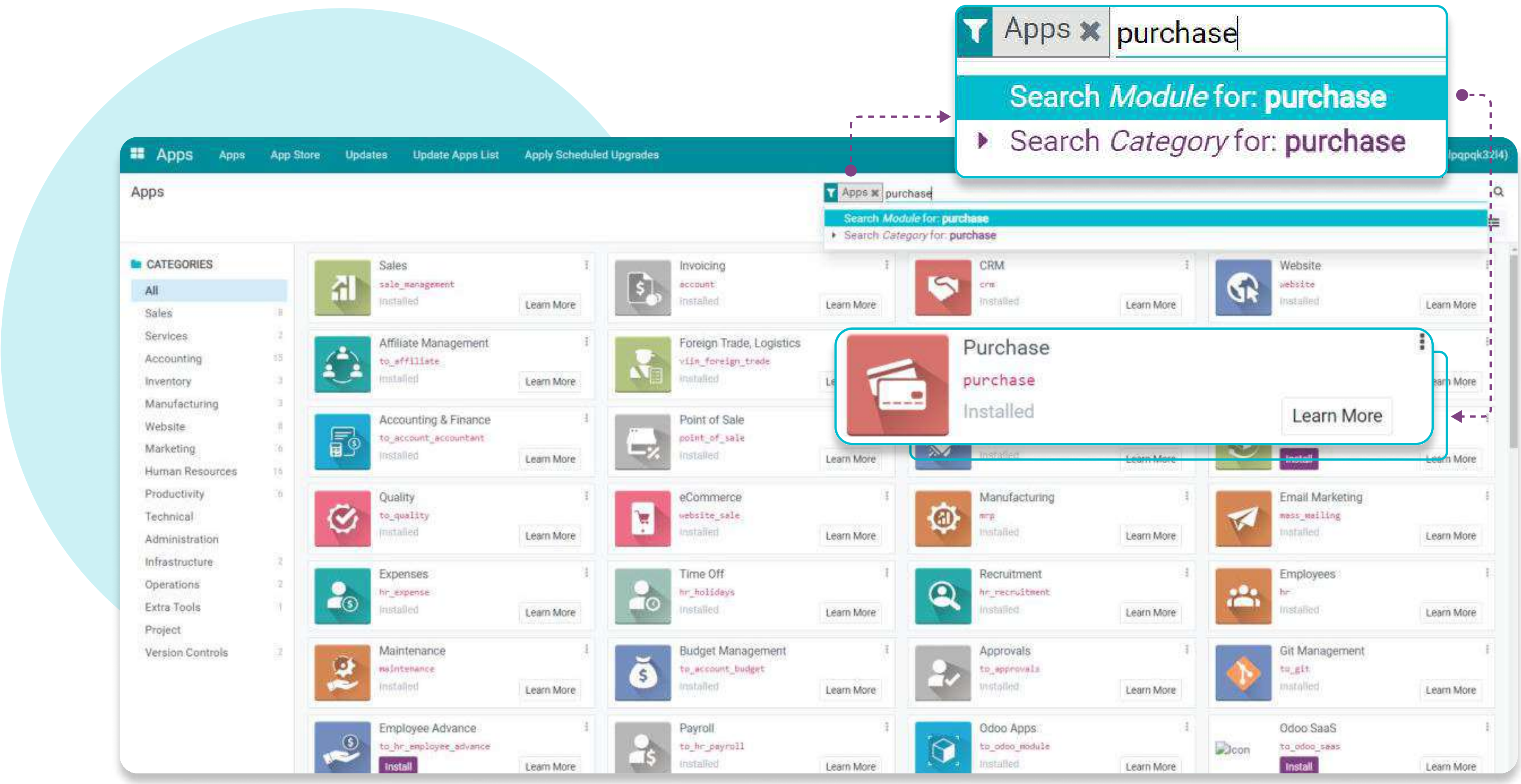
Note

To ensure data security and avoid having to re-import data, don't forget to:

- Import initial data such as the list of Products, Customers/Vendors information, Inventory Opening Balance, etc. to the official instance.
- For business-specific operations, do it on a test instance before operating on the official one to estimate risks that might come up while using the official instance.

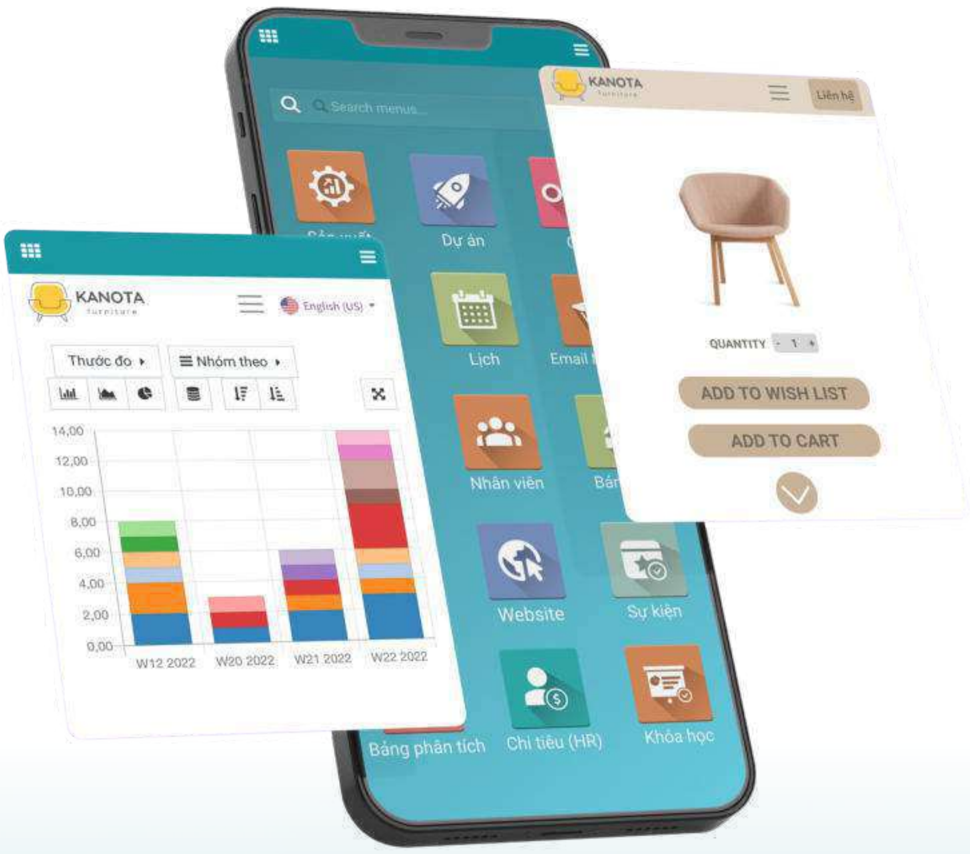
INSTALL THE RIGHT APPLICATIONS FOR BUSINESS OPERATION

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.

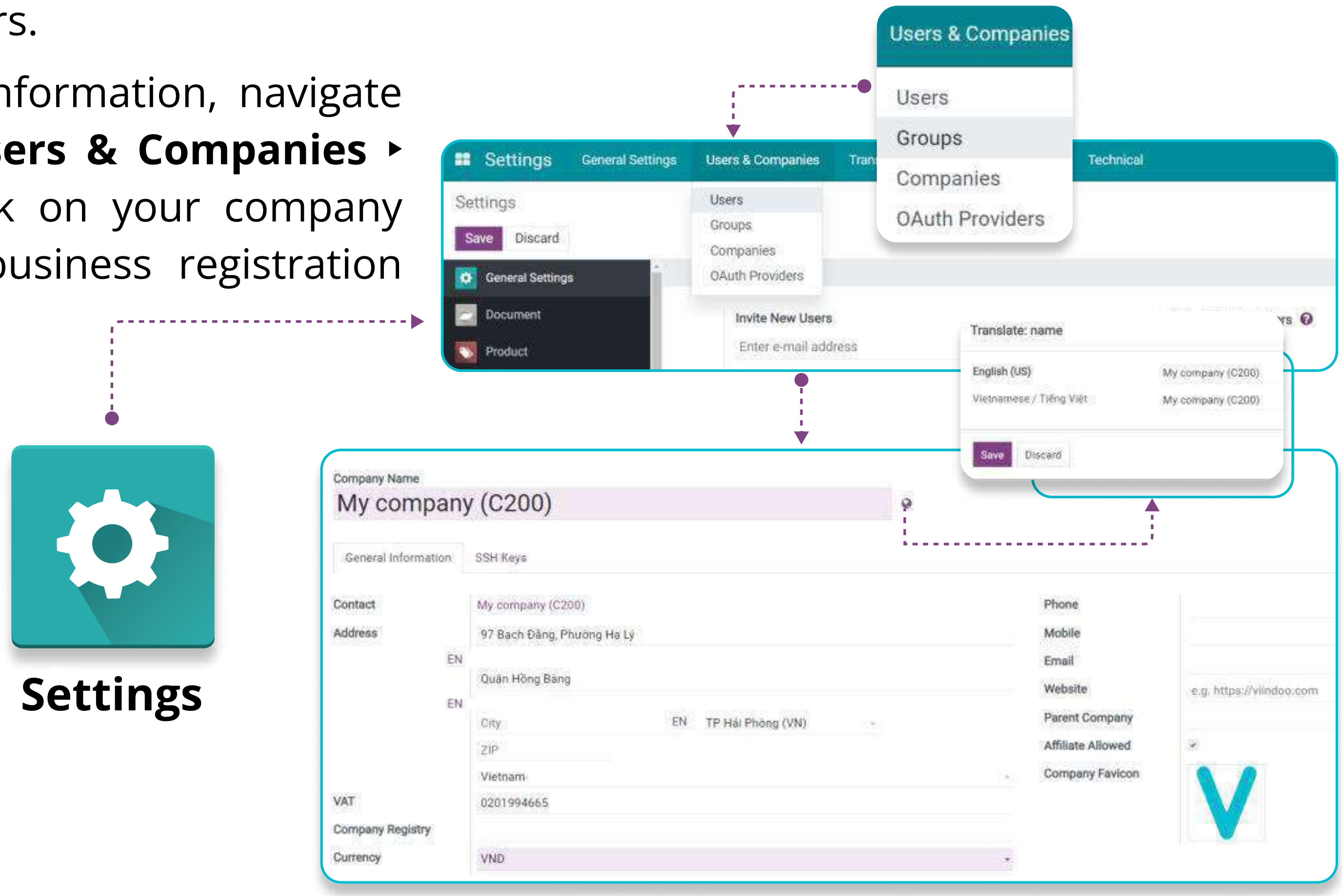
Get it on Google Play

Get it on App Store

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:

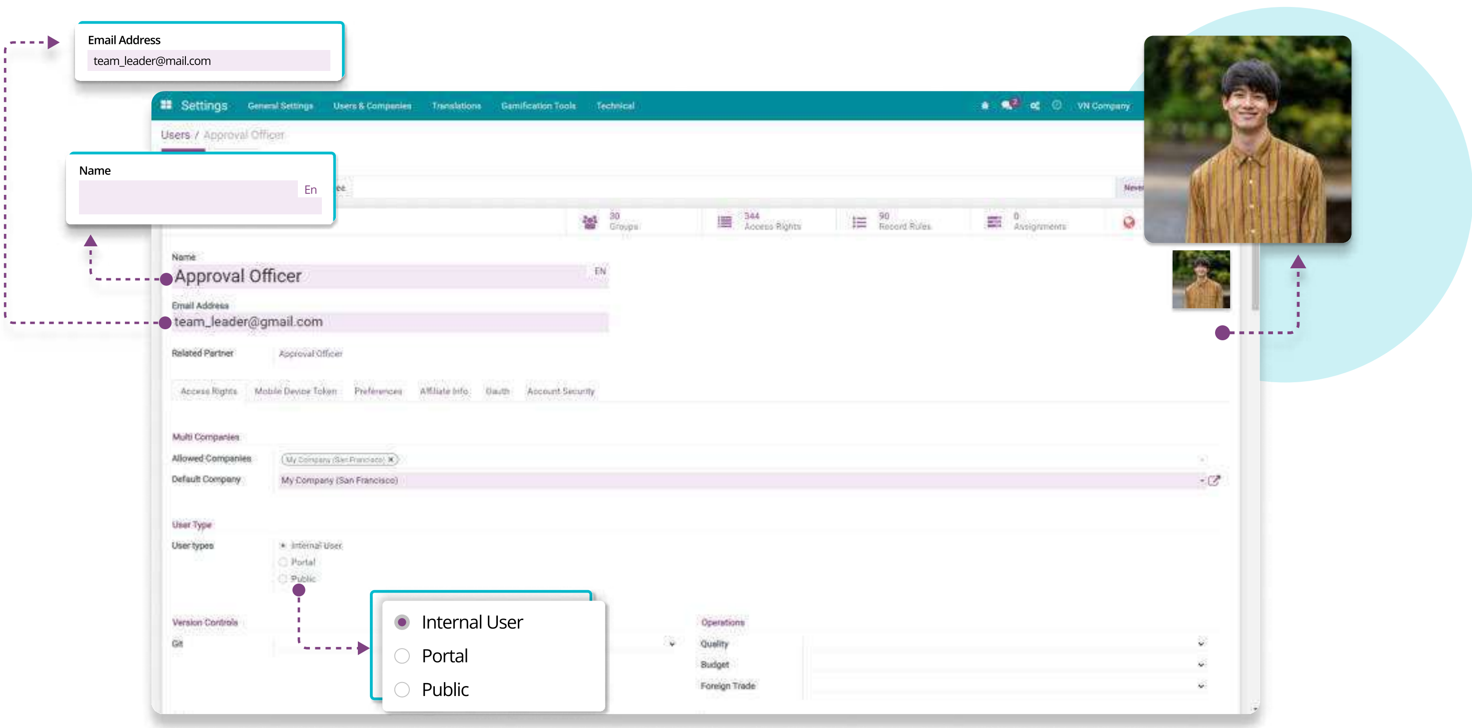


To display your company information in another language, you can click on the icon 🌐 or **EN** to enter the translated text for each information field.

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:

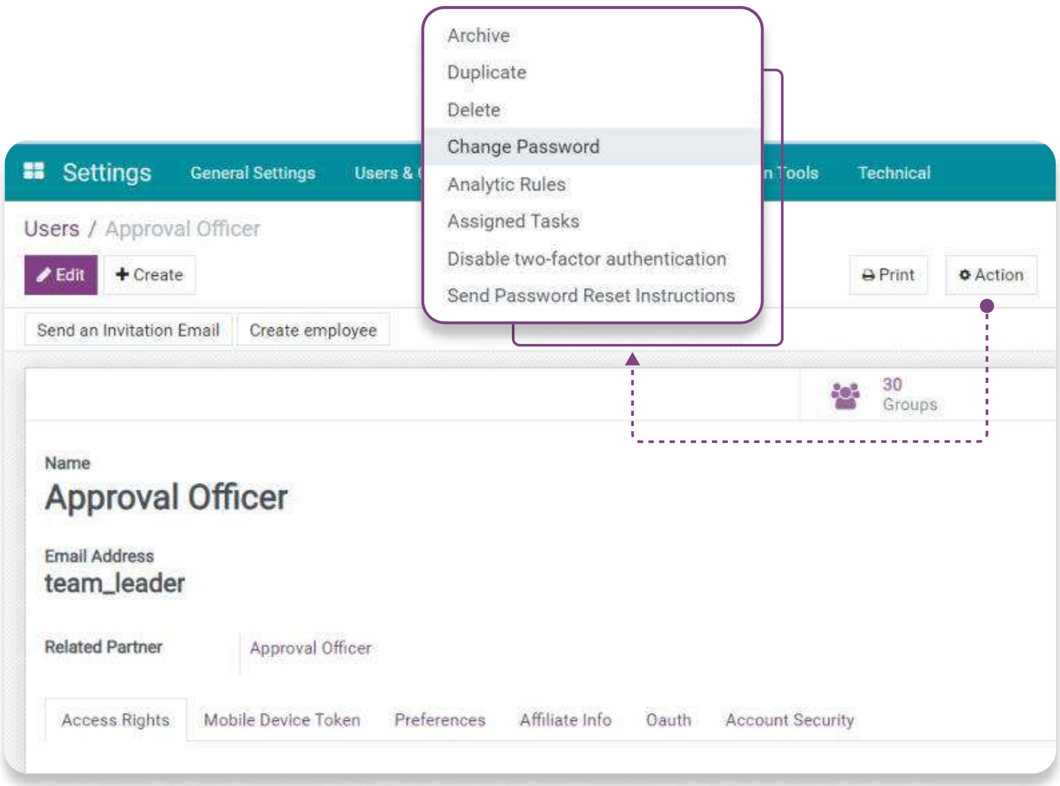
- *Name:* Add user's full name to facilitate the communication between users on the software.
- *Email address:* User account login name.
- *Avatar:* You click the pencil icon on the image in the right of the screen to add a new avatar for the user.
- *User Type:* Use the system default.

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:

Access rights / Job position	Document Management		Purchase Management		Sales Management		Inventory Management		Accounting	
	Officer	*Admin*	*User*	*Admin*	*User: All Document*	*Admin*	*User*	*Admin*	*Billing*	*Admin*
Director	○	✓	○	✓	○	✓	○	✓	○	✓
Document Management Officer	○	✓	○	○	○	○	○	○	○	○
Purchase Management	○	✓	○	✓	○	○	○	○	○	○
Purchasing Officer	✓	○	✓	○	○	○	○	○	○	○
Sales Management	○	✓	○	○	○	✓	○	○	○	○
Sales Person	✓	○	○	○	✓	○	○	○	○	○
Project Management	✓	○	○	○	○	○	○	○	○	○
Warehouse Management	✓	○	○	○	○	○	○	✓	○	○
Warehouse Staff	✓	○	○	○	○	○	✓	○	○	○
Production Foreman	○	✓	○	○	○	○	○	○	○	○
Manufacturing Staff	✓	○	○	○	○	○	○	○	○	○
Chief Financial Officer	○	✓	✓	○	✓	○	✓	○	○	✓
Accountant	✓	○	○	○	○	○	○	○	✓	○
HR Manager	○	✓	○	○	○	○	○	○	○	○
HR Staff	✓	○	○	○	○	○	○	○	○	○
Website Developer	✓	○	○	○	○	○	○	○	○	○

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



Enter the default password for the account. Later on, don't forget to ask the user to log in and Change to a personal password (Page 20) for security reasons.

LOG IN AND CONFIGURE PERSONAL ACCOUNT

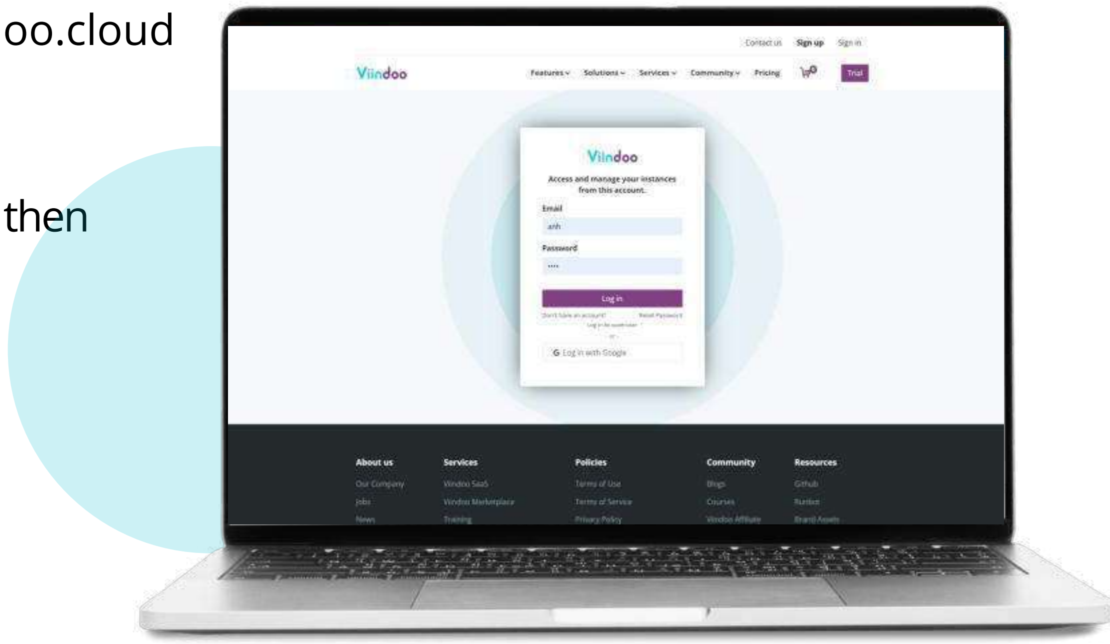
LOG IN TO VIINDOO SOFTWARE

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:

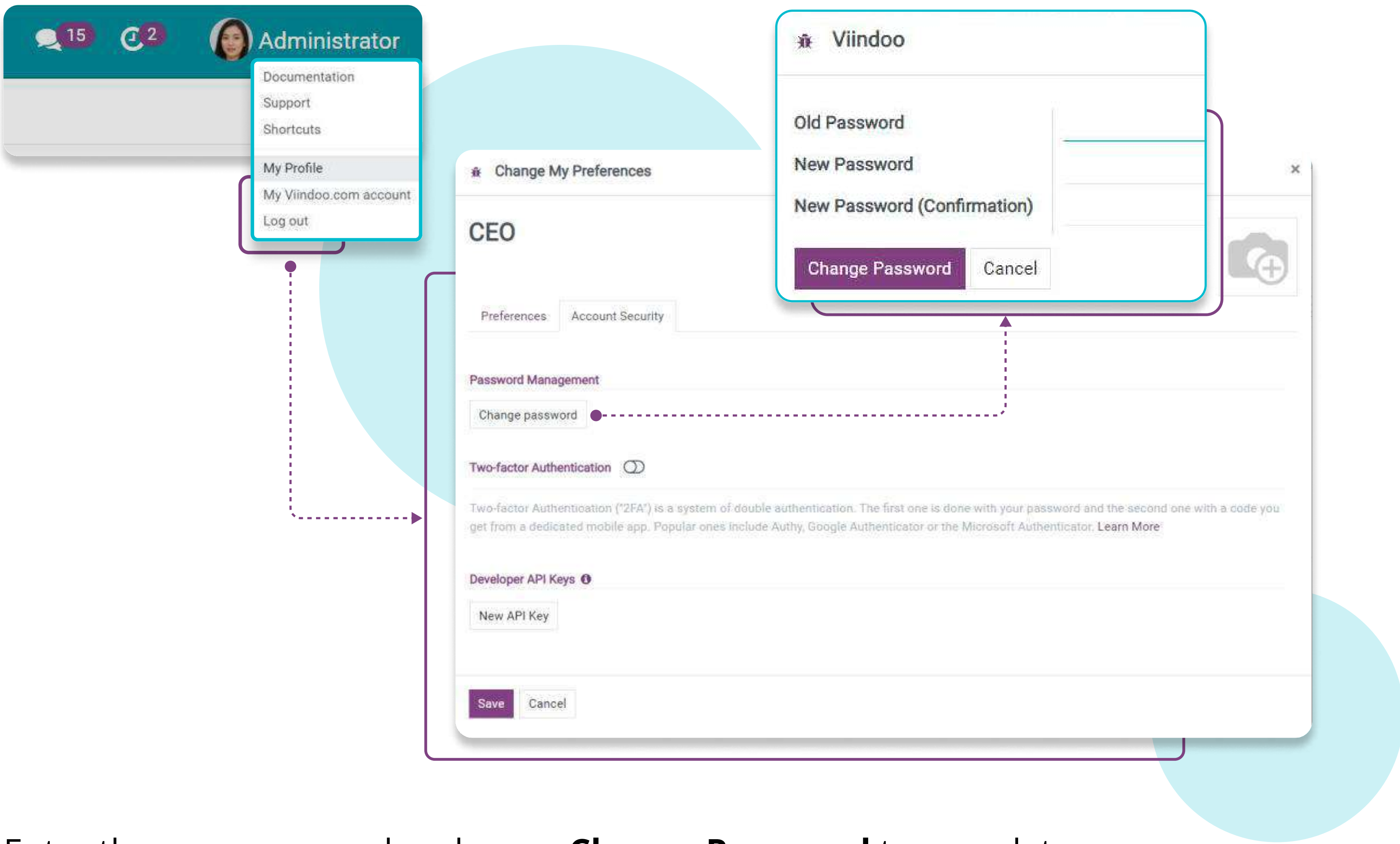
- *Your domain address:* Enter the Domain name created in the [Create a new instance]step. For example, yourcompany.viindoo.cloud
- *Your mail address:* Enter the email address of the user account that was created.
- *Password:* Enter the corresponding password.

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:**

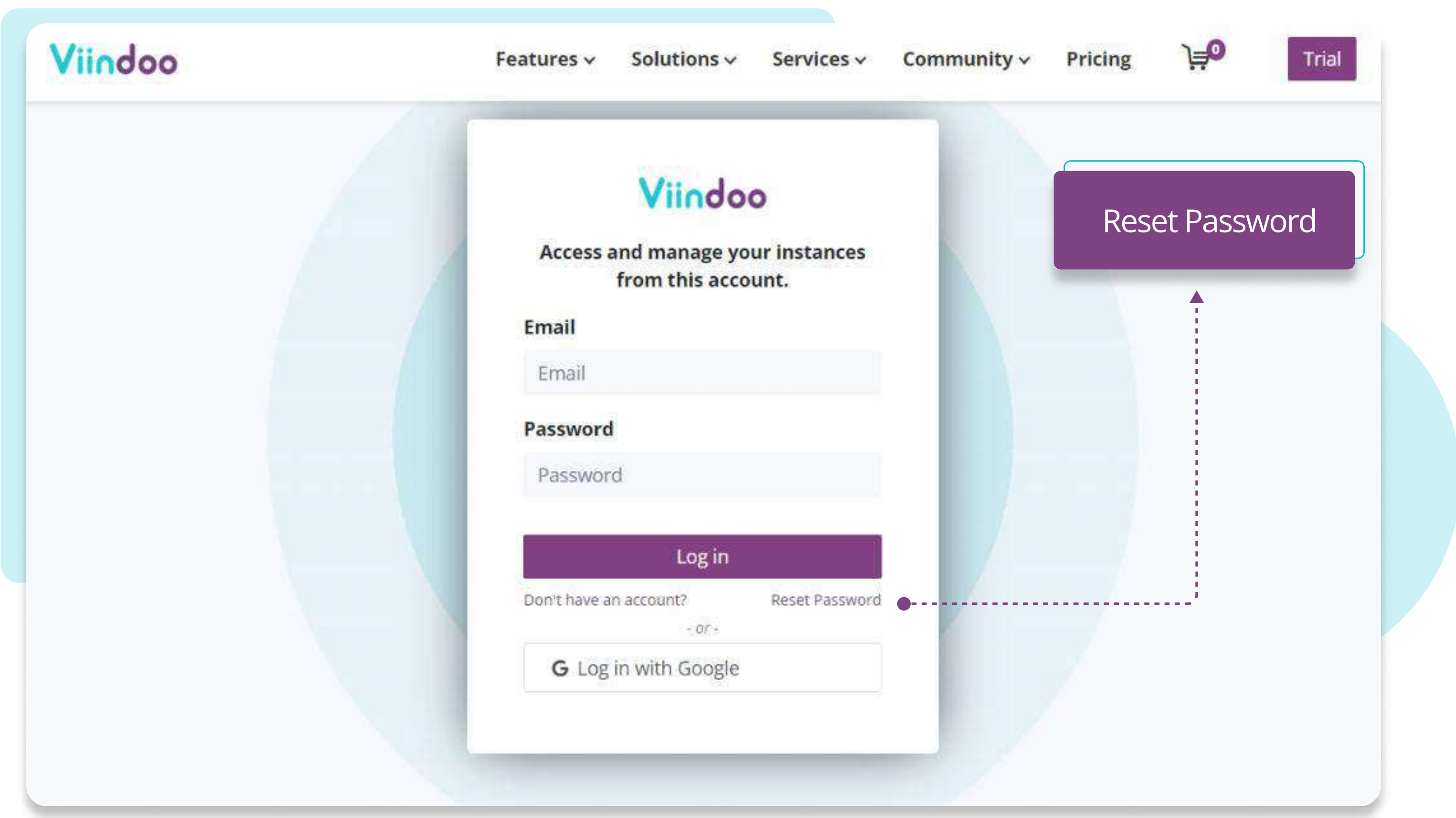


Enter the new password and press **Change Password** to complete.

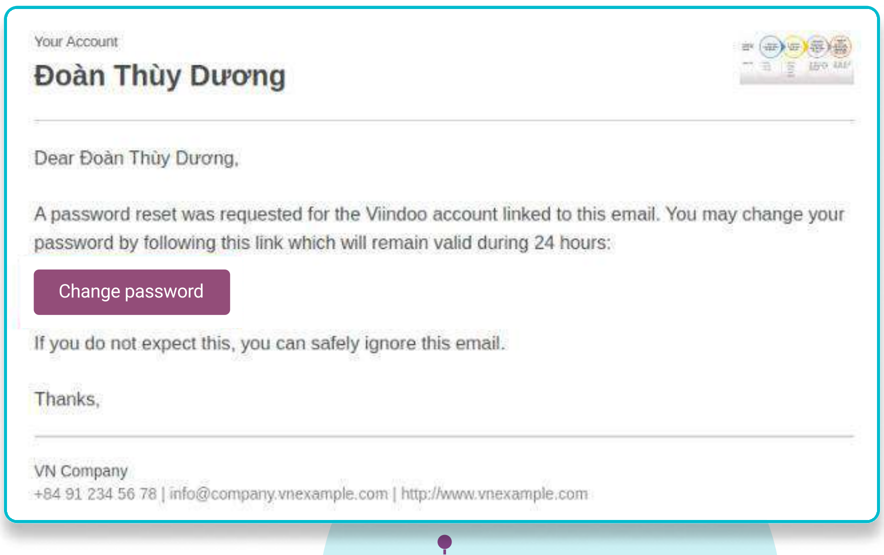
Reset password

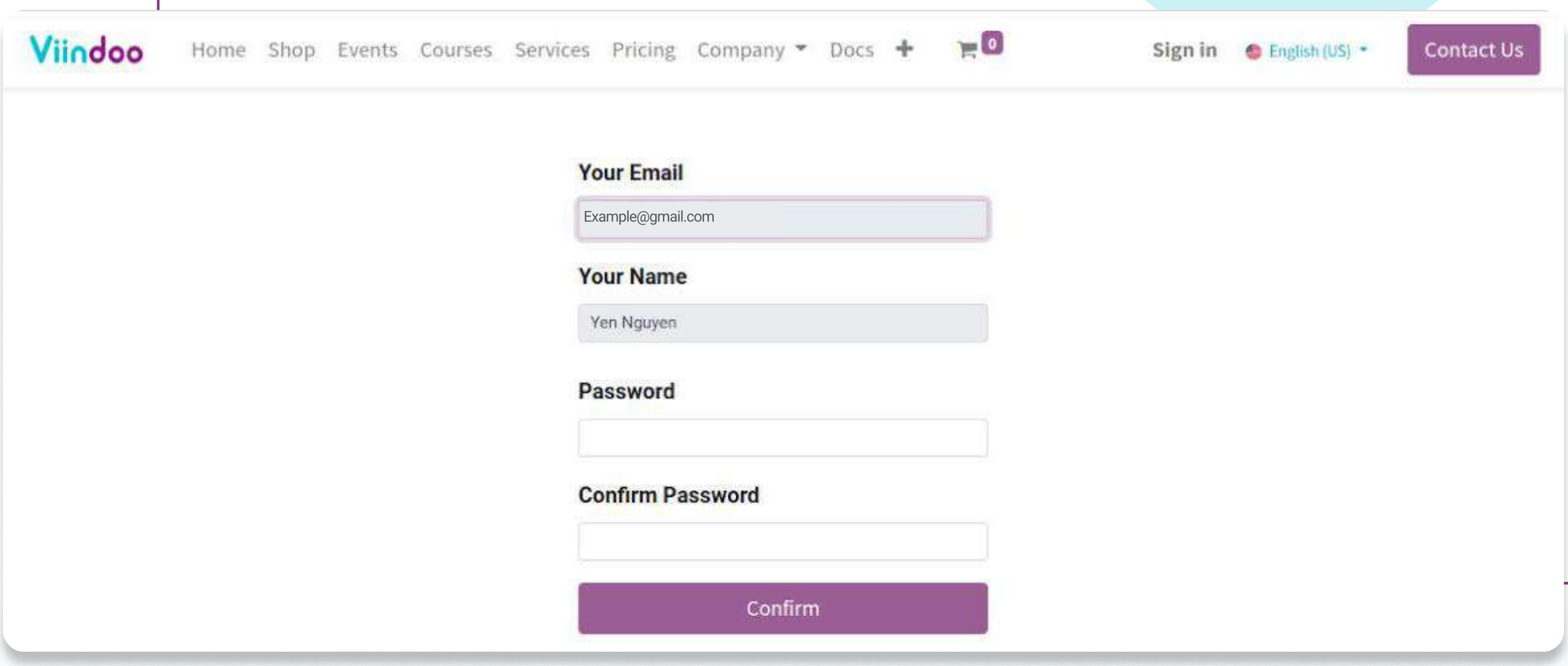
If you forgot your password, follow these steps to reset your account password:

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.**





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:

Product List → Inventory opening balance → Customers/ Vendors list

PRODUCTS LIST

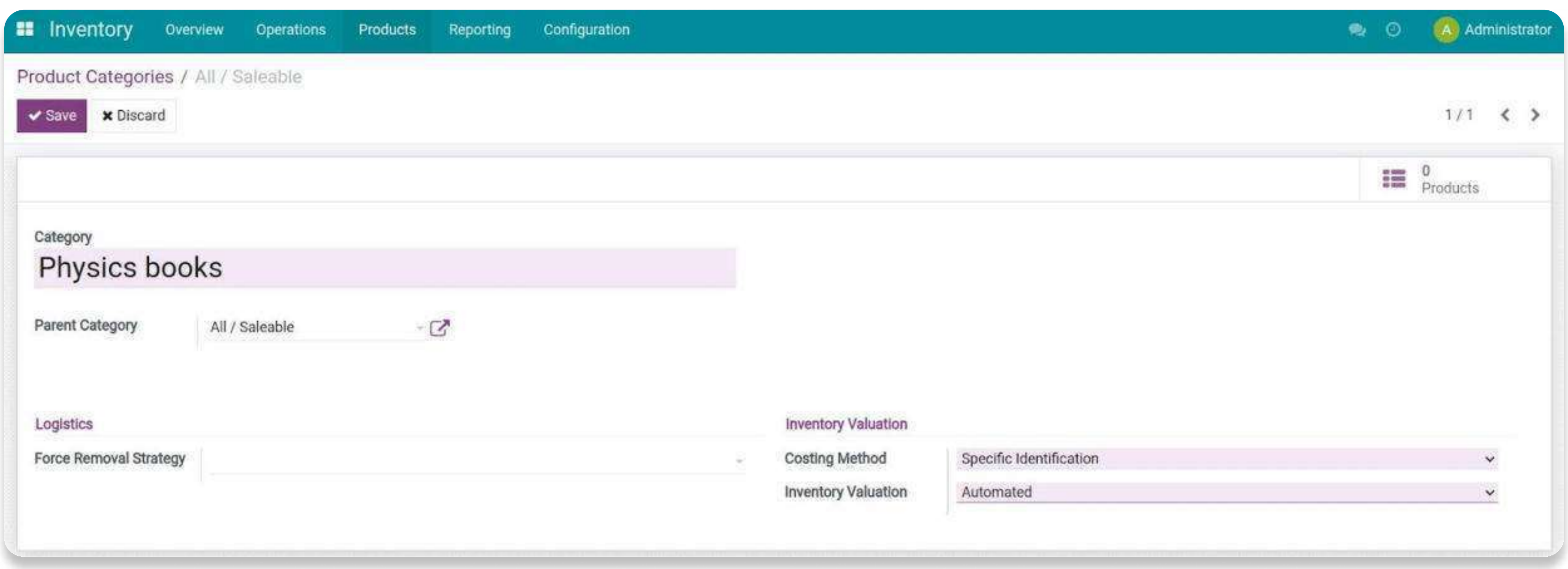
Products in Viindoo include all the products, services that your business manufactures, purchases, sells and all the expenses generated from daily operations (e.g: An office TV, Catering services, Car rental services, etc.). To manage a product, you need to configure the following information related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

Product Categories → Unit of Measure → Products

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 into the hierarchy 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.



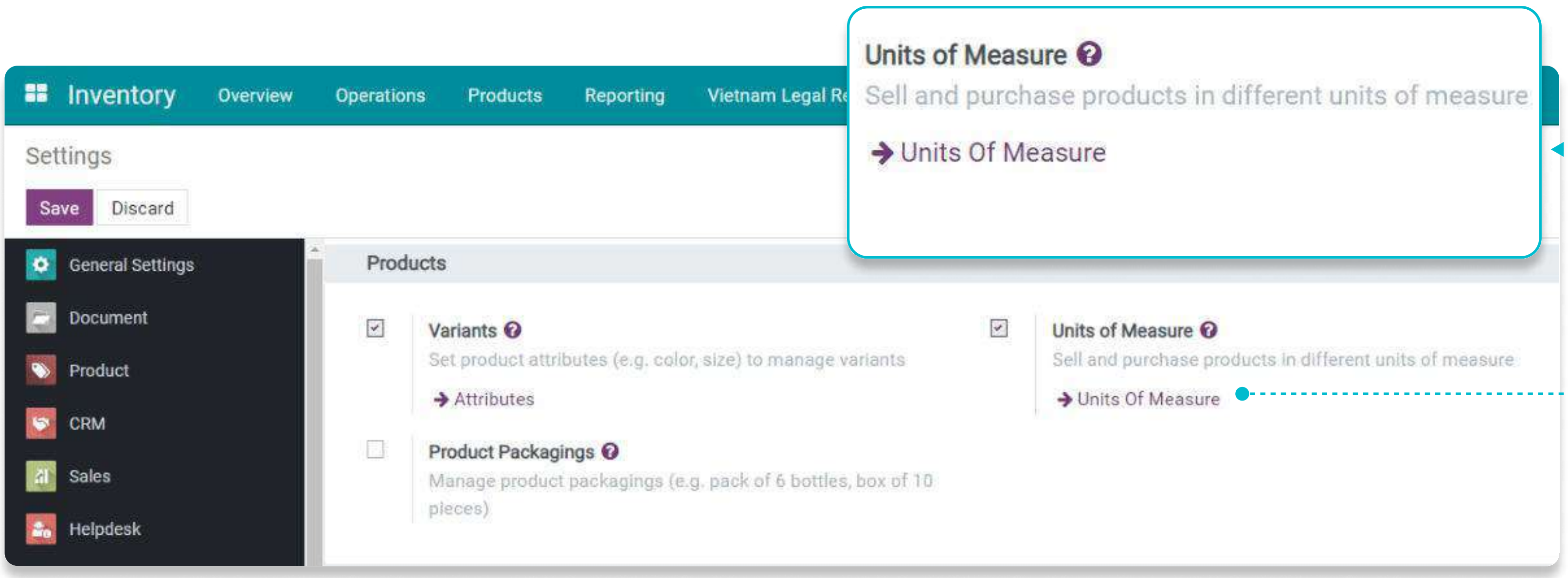
Press on the **Products** button on the top right corner of the interface to view the products list of a category. Once done, press **Save**.

> **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)

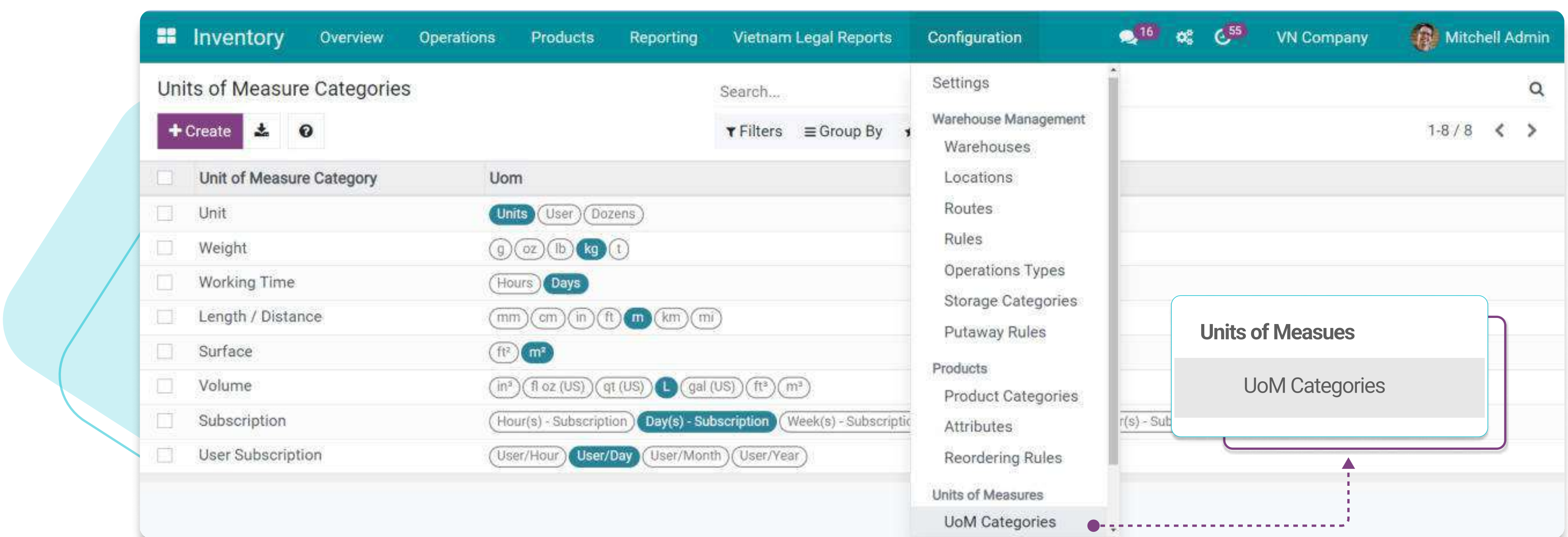
Enable Units of Measure feature

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.).

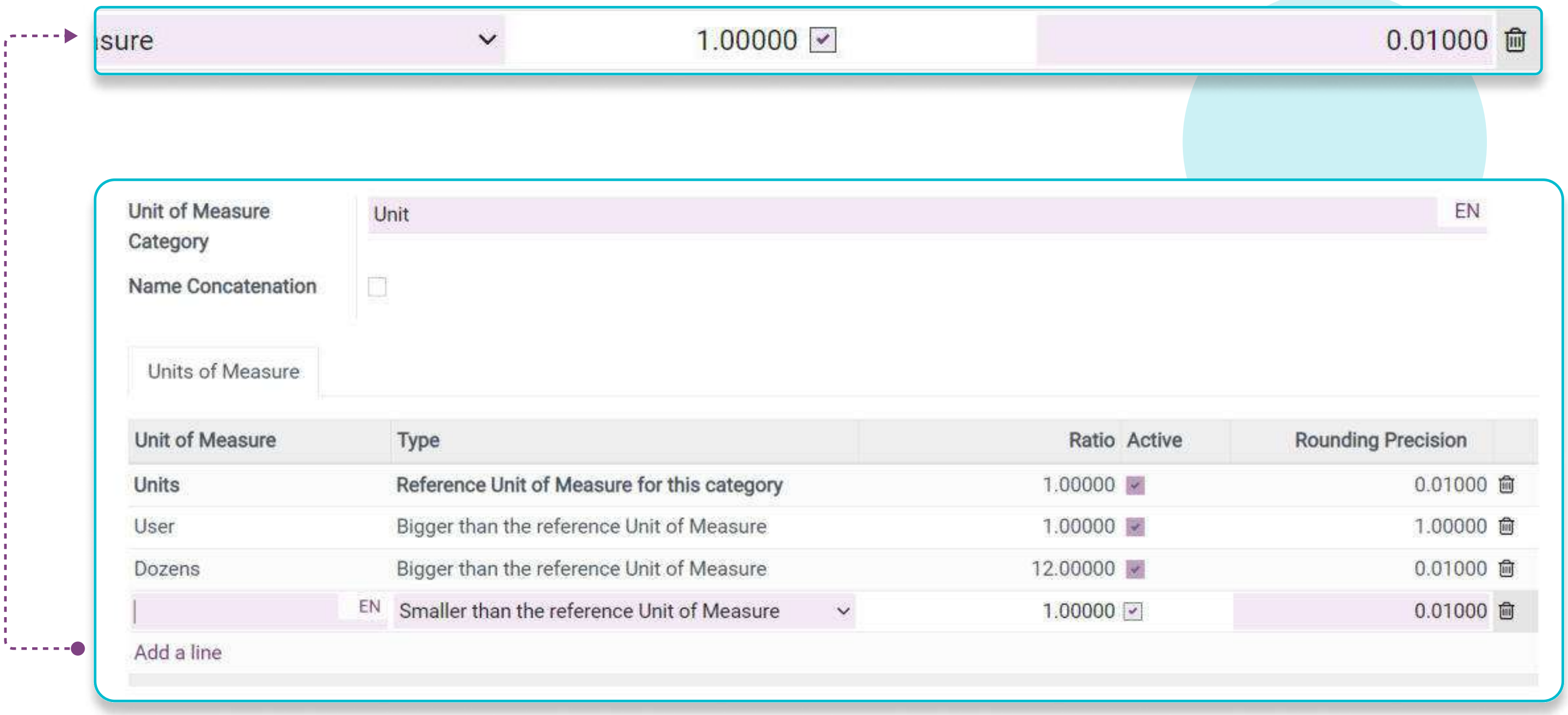


Create new Units of Measure (UoM)

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.



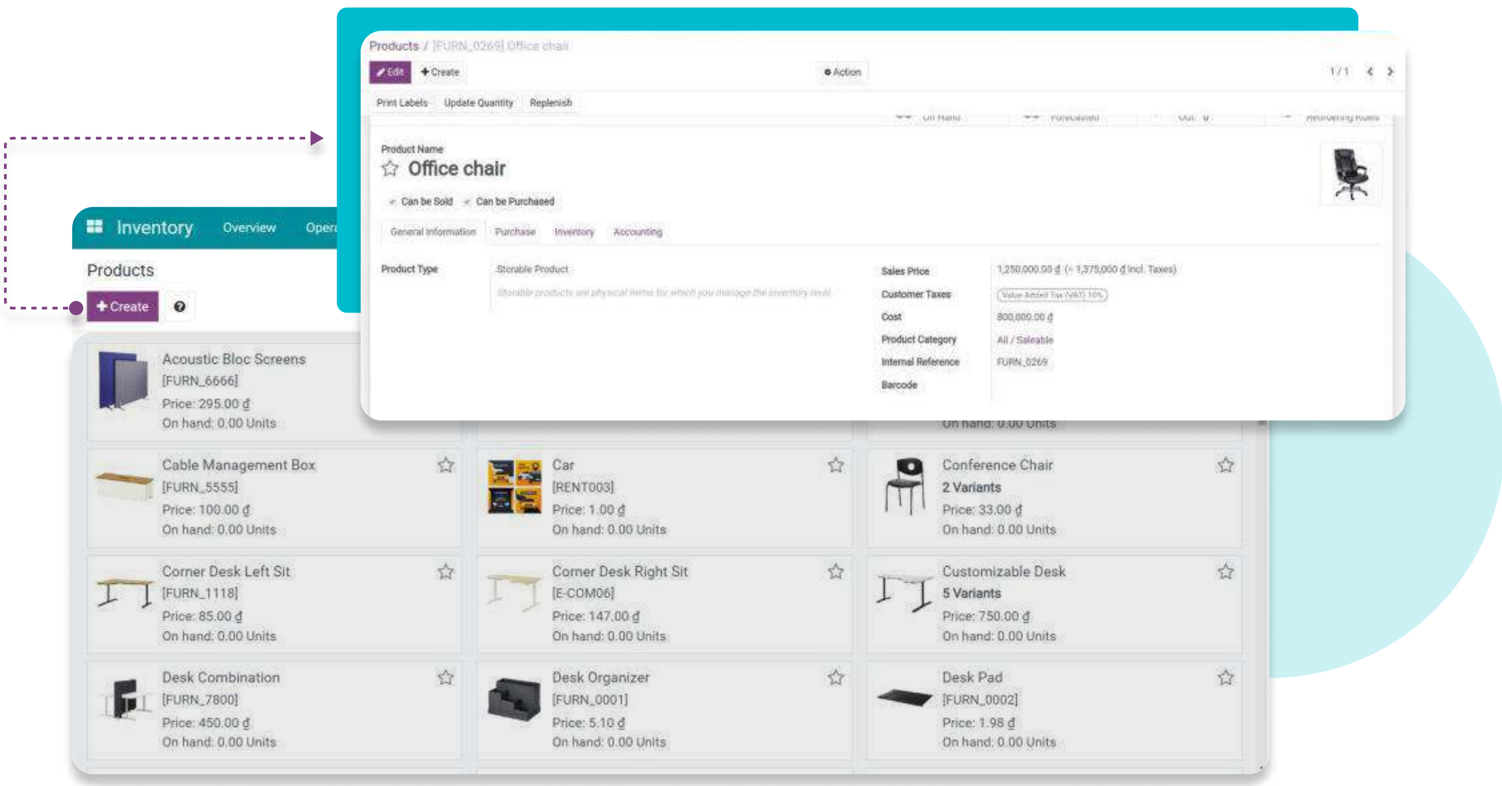
➡ **See details at:**

- *[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**.

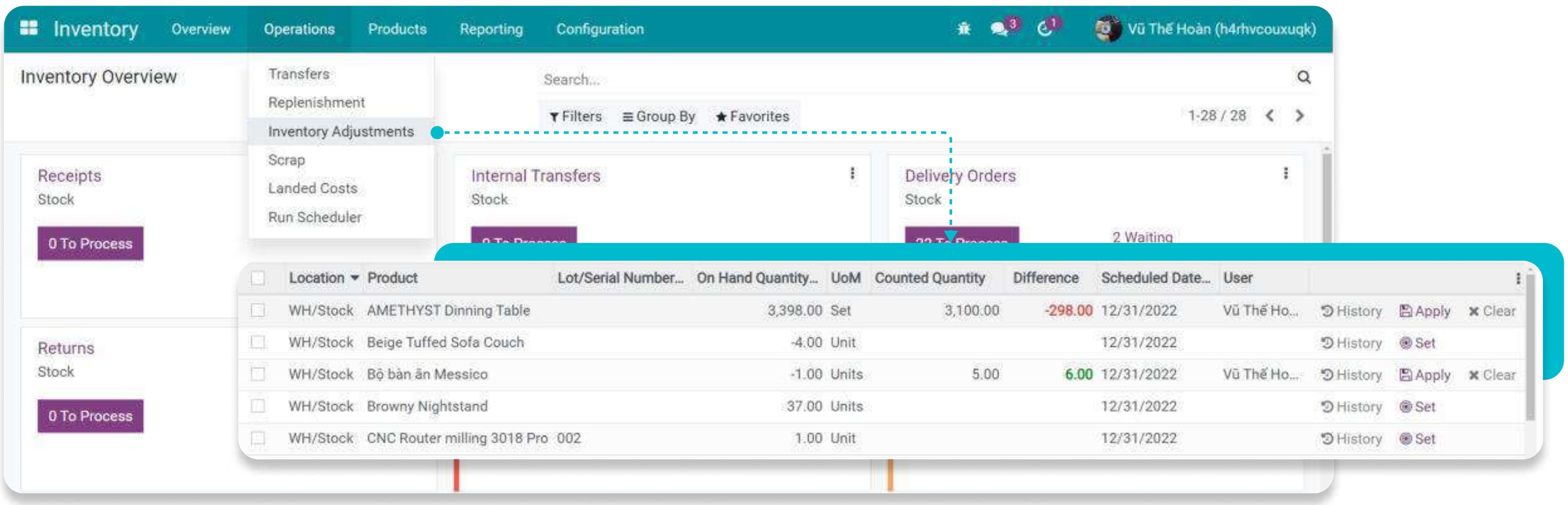
From here, add a picture (if applicable) and comprehensive information about your product. Also, define whether this product can be purchased or sold. This information decides the accessibility to the product from the Purchase or Sales app later on.



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.

PERFORMING DAILY OPERATIONS IN VIINDOO

E-OFFICE MANAGEMENT

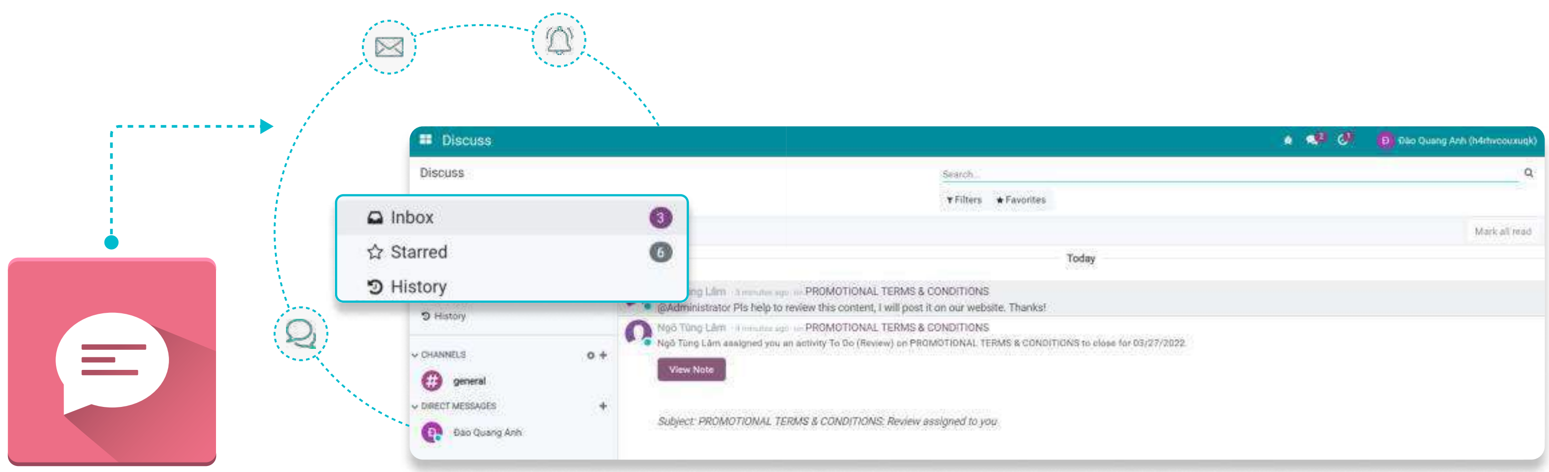
- Using business social networks in Viindoo software
- Book and track meeting schedules
- Manage personal work and assign work
- Organize document workspaces

USING BUSINESS SOCIAL NETWORKS IN VIINDOO SOFTWARE

- Receiving and processing information
- Internal and external interaction

Receiving and processing information

Viindoo Social Network is a mini social network where not only internal discussions happen but also is a tool supporting communication between your business and other partners outside of your company.
Let's get started with the **Discuss** app:



Discuss

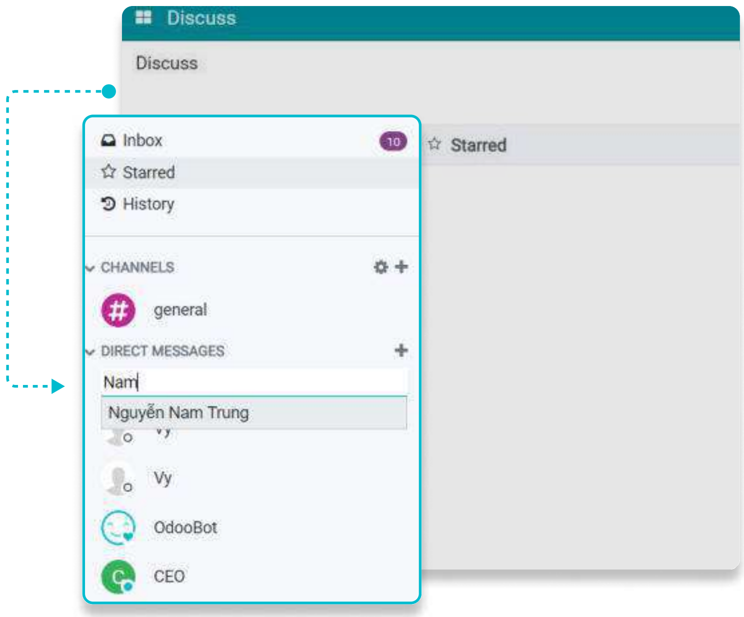
- *Inbox:* Display all incoming messages. For effective task management, you should categorize these messages using the *Get things done* principle. Resolve messages that wouldn't take longer than 2 minutes, otherwise, mark them to solve later.
- *Starred:* Display messages that are marked with a star. Make a plan to solve them when you have time.
- *History:* Display all the read notifications, messages.

Internal and external interaction

You can exchange information within your business by using **Direct Messages**, **Channels**, or the Chatter section on the interfaces of applications on the Viindoo software.

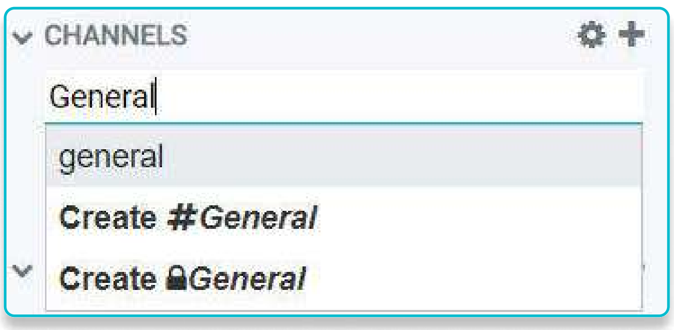
Direct Messages

To send a direct message to each user in the system, select the plus icon (+) on the **Direct Message** section and search for the person you want to chat with.



Channels

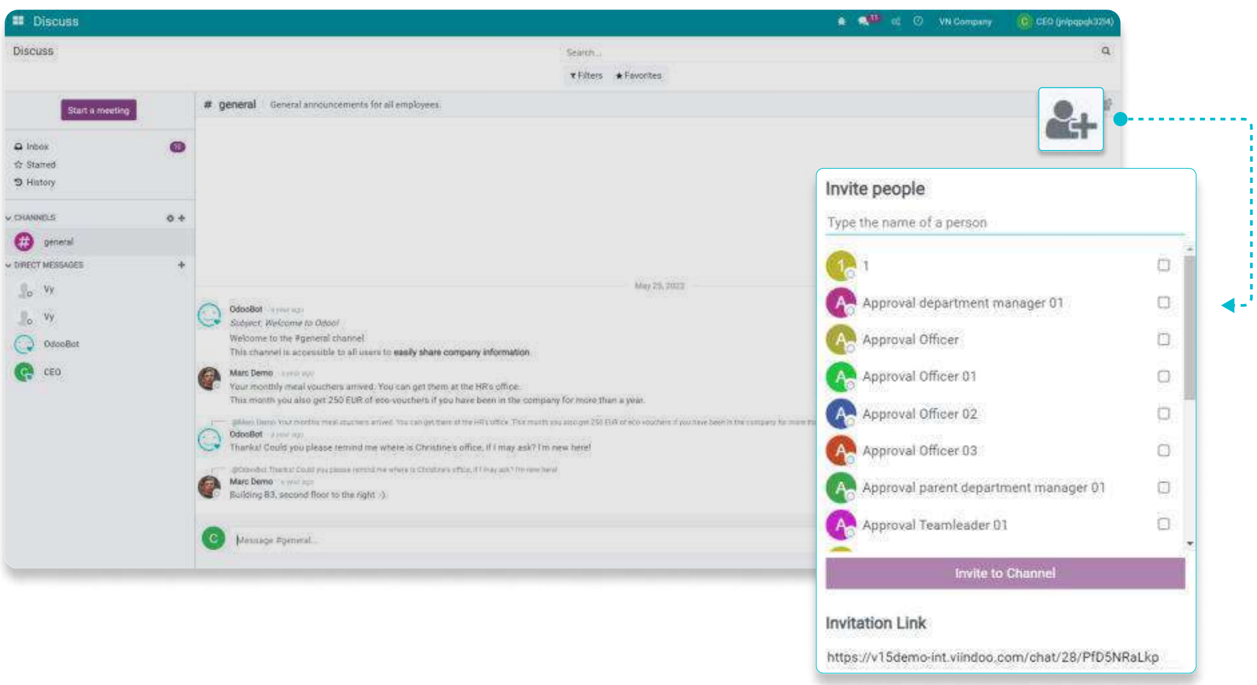
A channel is where your employees discuss a certain topic. In addition, you can also use channels to communicate with your customers or anyone outside of your business.



There are two options:

- *Public channel (#):* Everyone can see and join this channel.
- *Private channel (🔒):* Only the channel creator and invited members can join the channel.

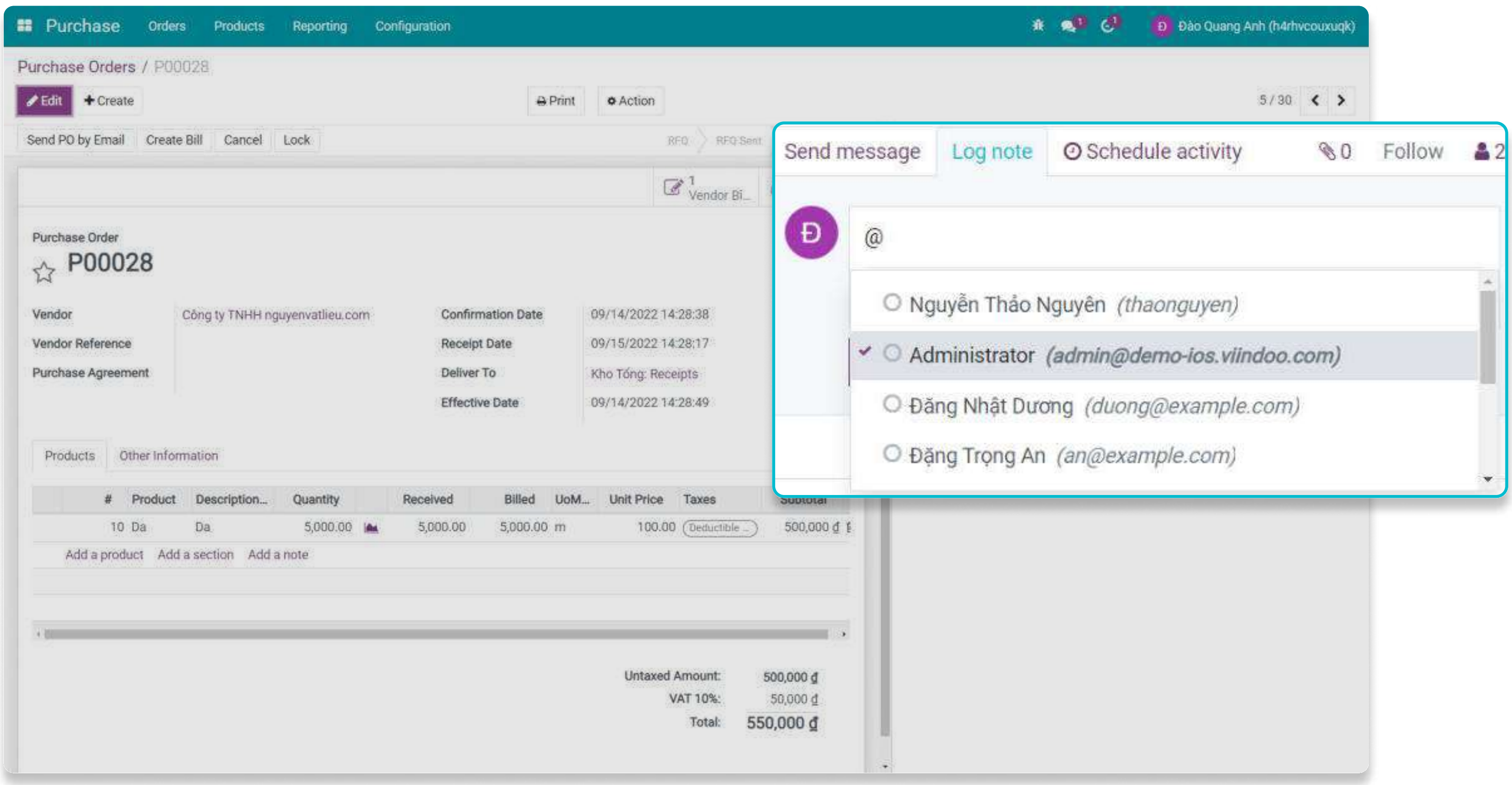
Click **Invite to Channel** or copy the link to send invitations to the system users you want to invite to join this channel.



Exchange information in the Viindoo software

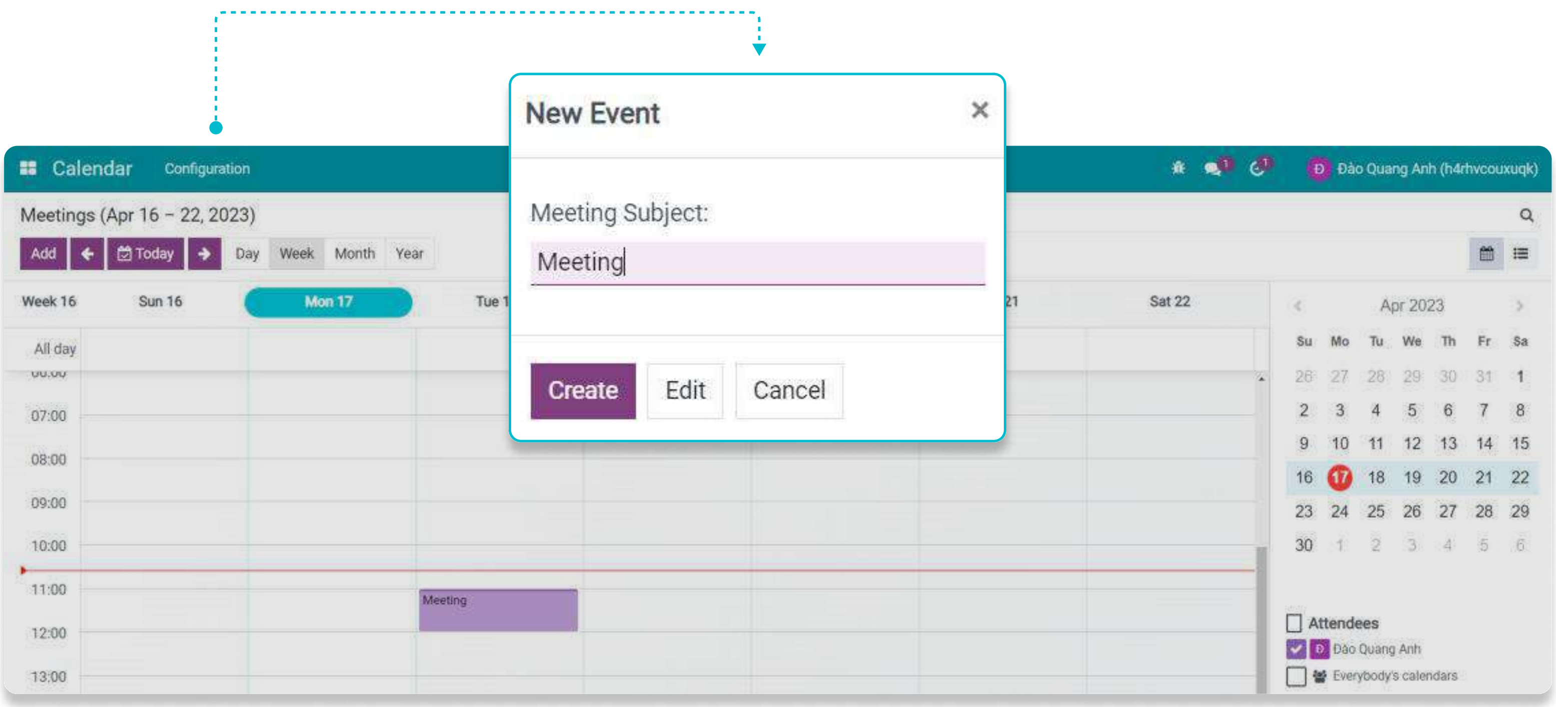
You can interact and send messages to other colleges or external partners from any app in the Viindoo software. In the Chatter section:

- *Internal communication:* Press Log note and use the *@ Character + username format* to tag the user you want to mention.
- *External communication:* Press Send message to write outgoing messages and send attachments to your partners.

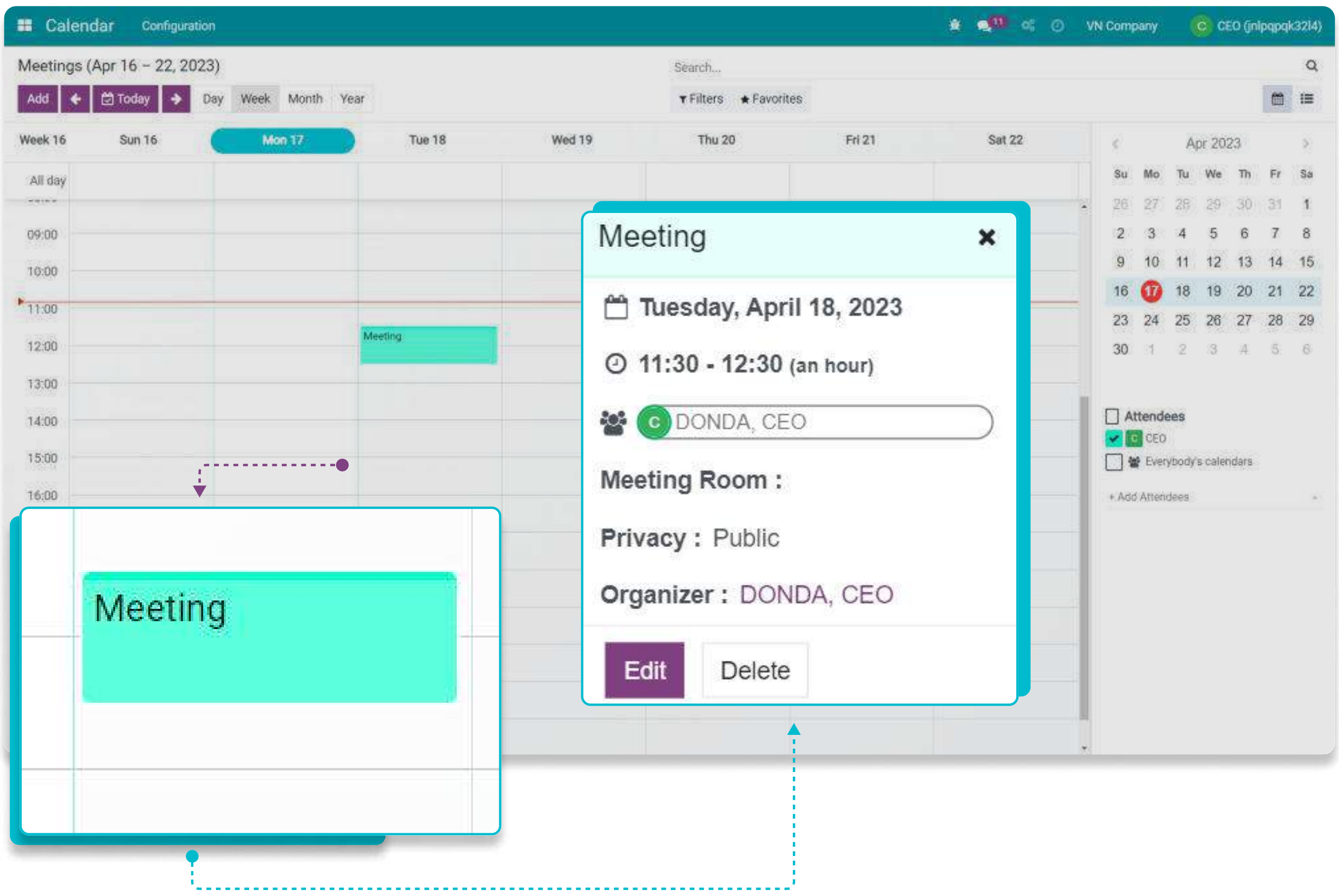


BOOK AND TRACK MEETING SCHEDULES

Navigate to the Calendar app, select a time slot for your meeting, and click to pop up the quick event creation window.



A meeting with a duration of 30 minutes will be created. You can move this event to adjust its duration according to your needs. Each move is equal to an adjustment of 30 minutes.



If you want to make other adjustments, you can click on the meeting and then press **Edit** to enter the information.

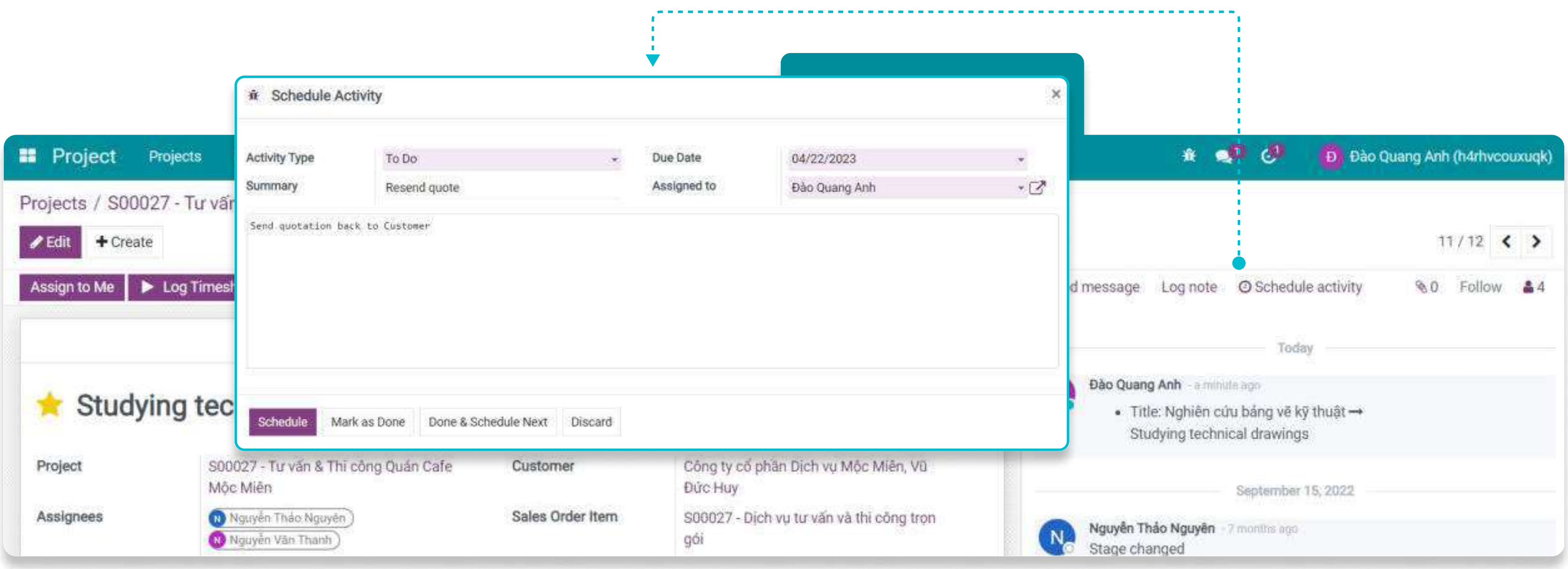
You can also quickly create a meeting on the Calendar view by clicking **Add**.

➡ See details at:

- *How to create a Calendar on Viindoo.*

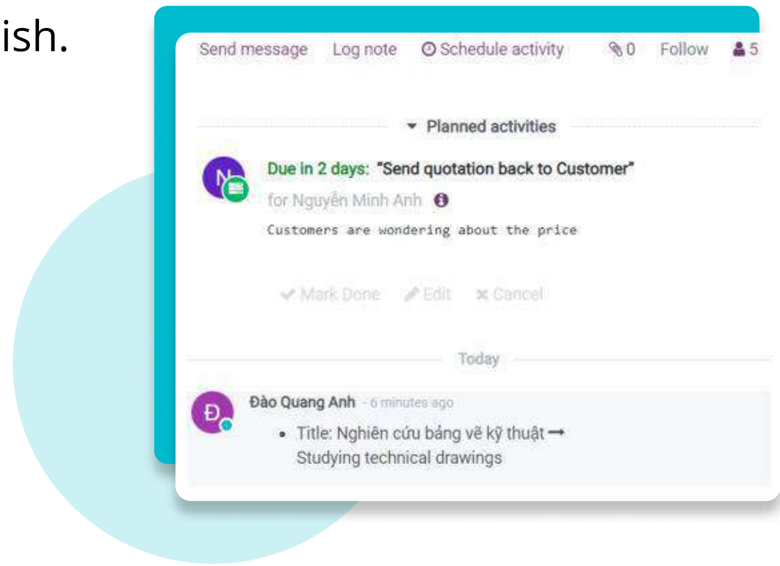
MANAGE PERSONAL WORK AND ASSIGN WORK

Viindoo software provides the **Schedule activity** feature to help you plan and process your work efficiently. Press **Schedule activity** in the **Chatter** section of many interfaces, such as quotations, purchase orders, projects, tasks, opportunities, leads, etc., to plan your activities.



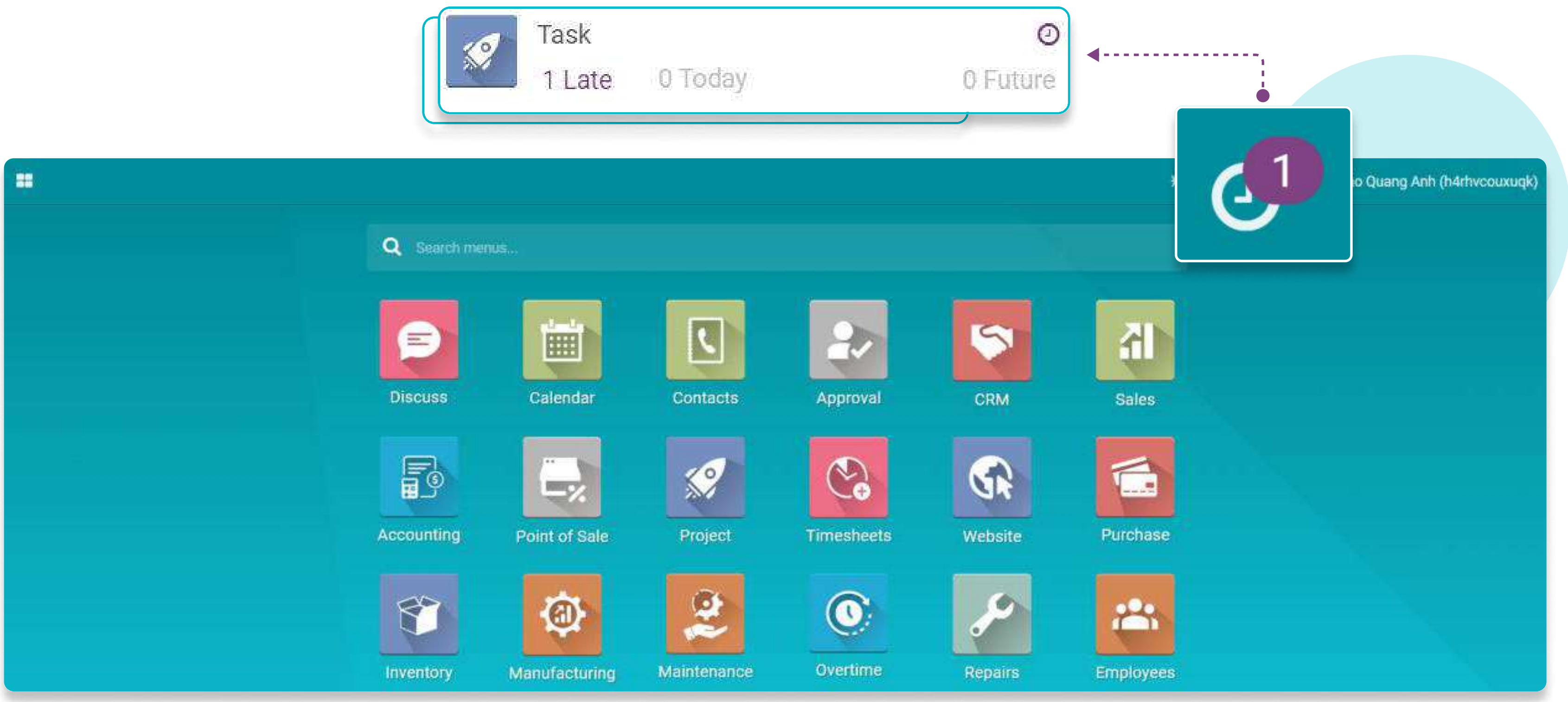
You must enter information such as the Activity Type, Due Date, and Assigned to yourself or others.

Then press **Schedule** to finish.



To review scheduled tasks, press the clock icon in the title bar.

Here, you can click on each work item to go to the interface where you have scheduled the activity.



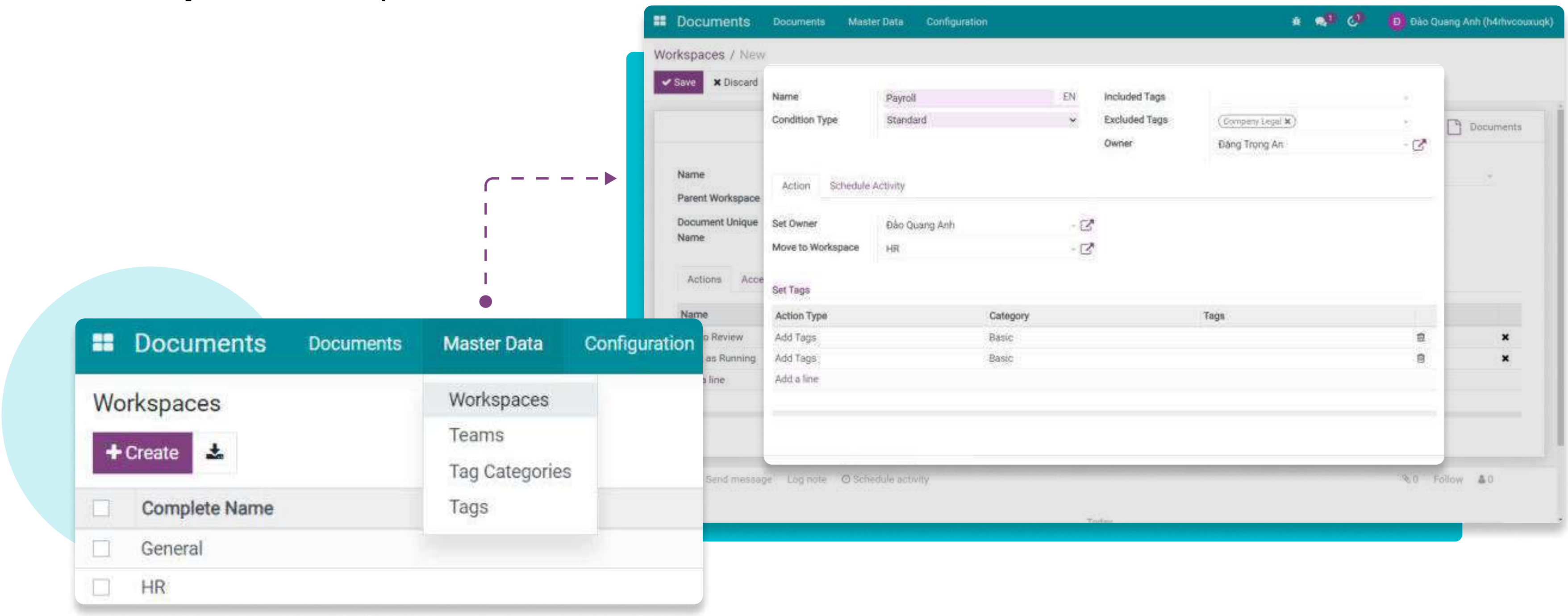
ORGANIZE DOCUMENT WORKSPACES

Organize document workspaces → **E-documents storage** → **Share documents** → **Search documents** → **Delete documents**

➡ *Check out Viindoo's suggestions for document management by job positions in Appendix: Organize document workspaces - (Page 135).*

Organize document workspaces

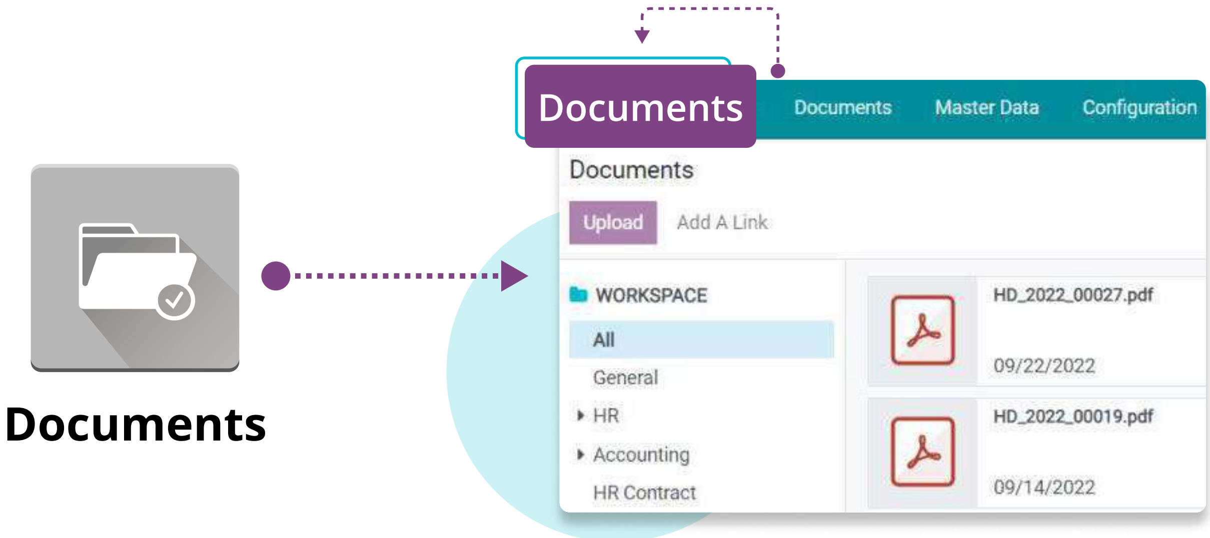
Documents in the Viindoo system are organized and stored into different folders known as workspaces. To create a workspace, go to **Documents ‣ Master Data ‣ Workspaces** and press **Create**.



To create a sub-workspace inside a specific workspace, click that workspace. At the **Sub-Workspaces** tab, press **Add a line** and add the necessary information about the workspace to create a new one.

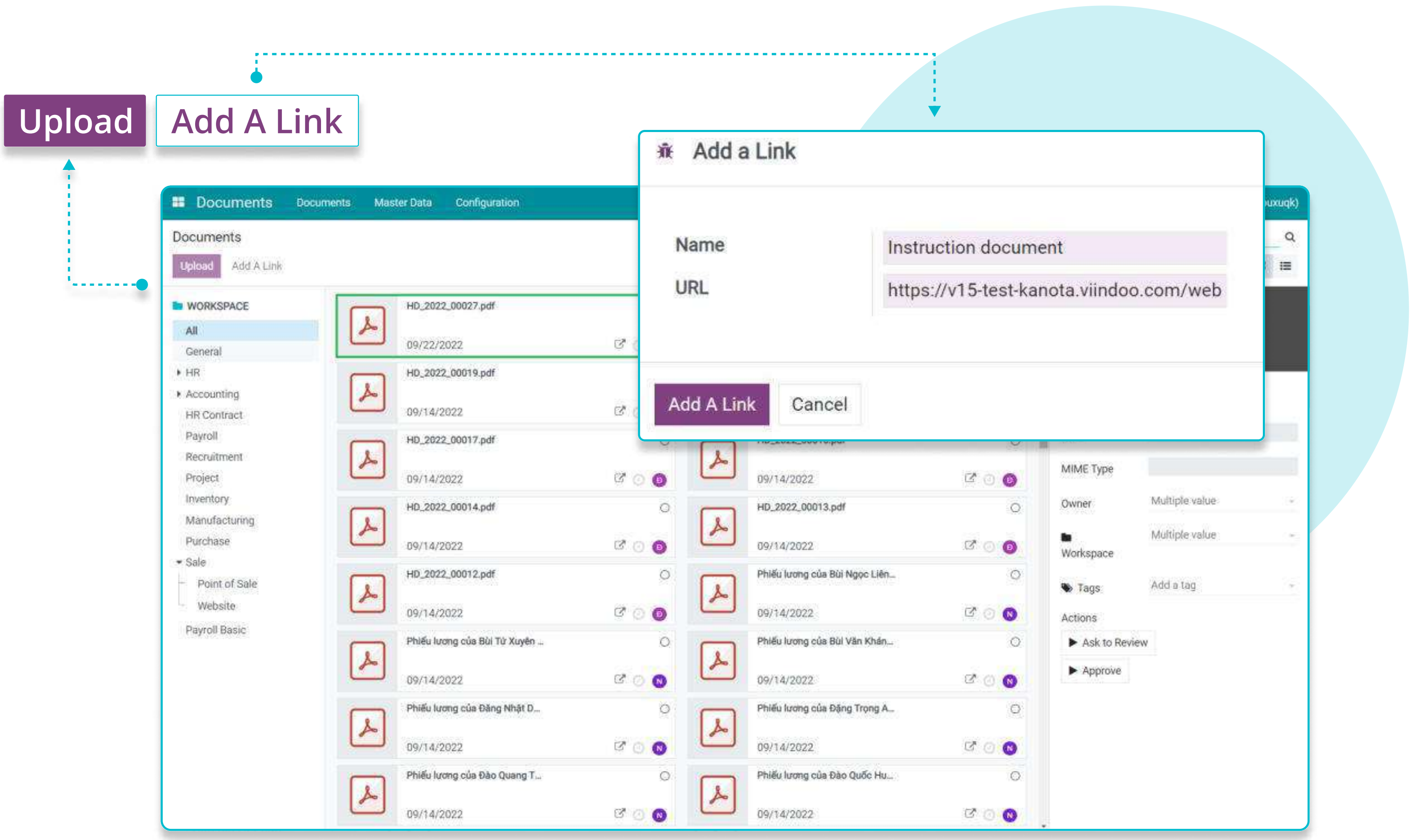
E-documents storage

Navigate to **Documents ‣ Documents** to access the document management interface.



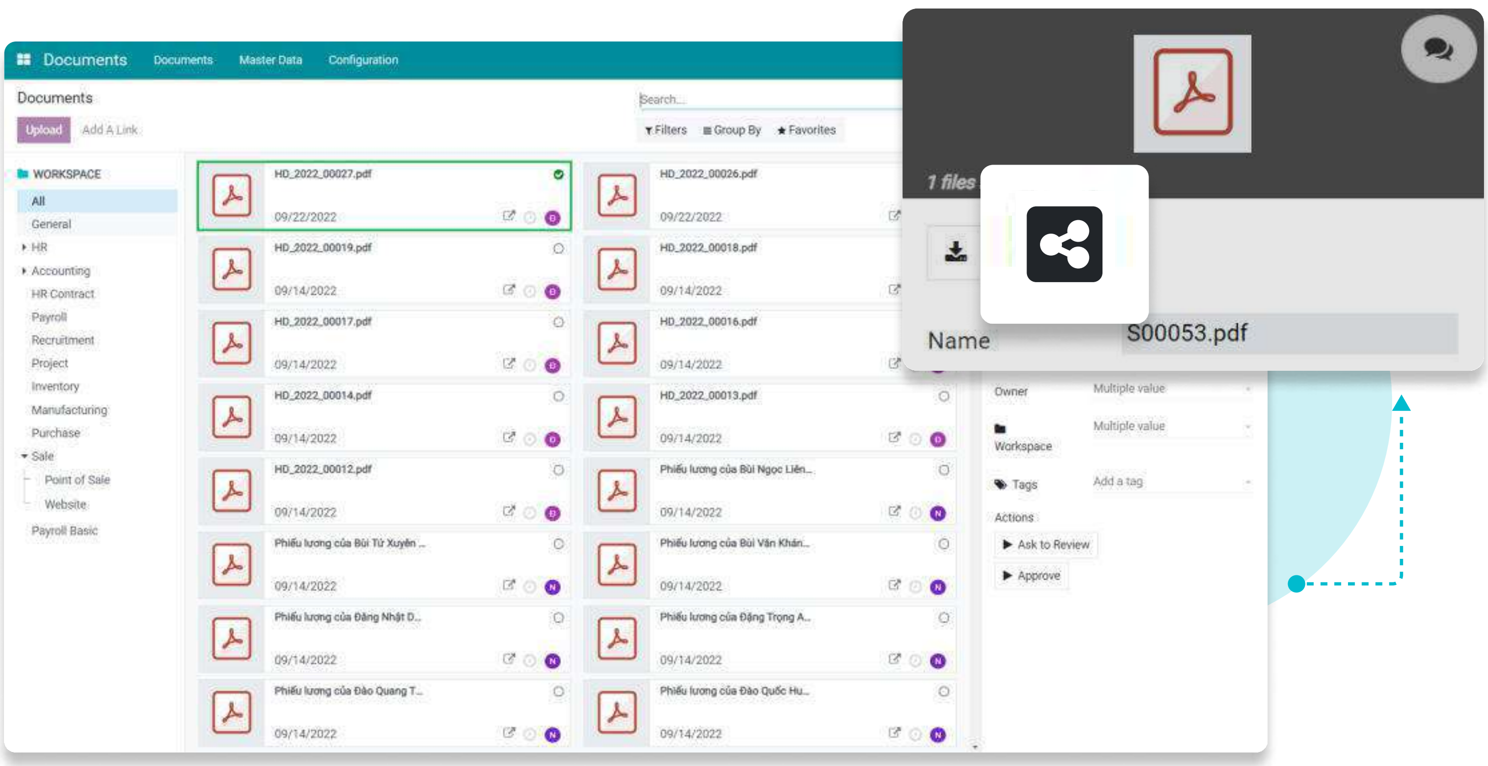
From here, select the workspace that you want to add documents to from the tree diagram, then choose one of the following two options:

- Press **Upload** to upload files (PDF, Excel, Word) from your computer to the Viindoo system.
- Press **Add A Link** to attach documents as links. You will be redirected to the interface to enter the name and URL for the link. Then press **Add A Link** to complete the operation.

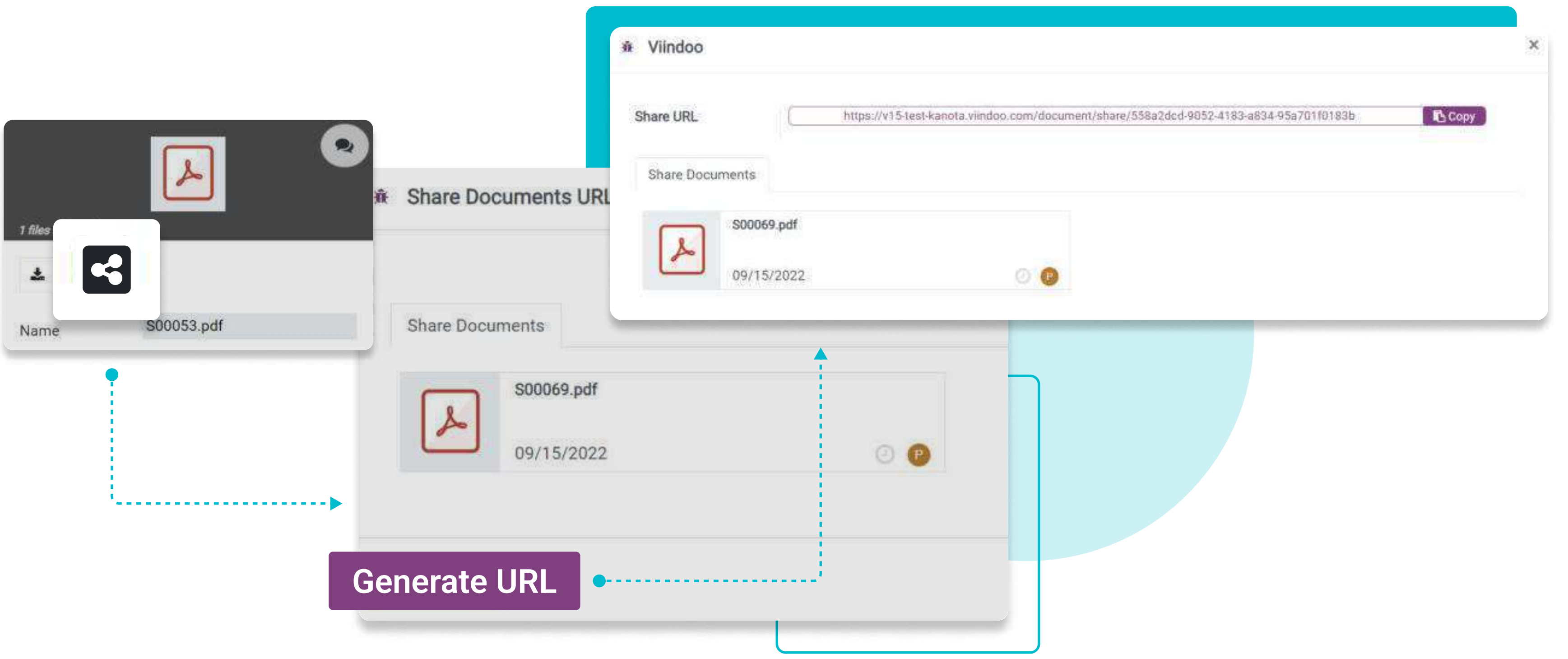


Sharing documents

To share a document within your company, navigate to the document that needs to be shared and click on the share icon as below:



On the pop-up window, click **Generate URL** then press **Copy** to copy and share the URL that is automatically generated by the Viindoo system. Internal users and Portal users can access the shared document through this link.

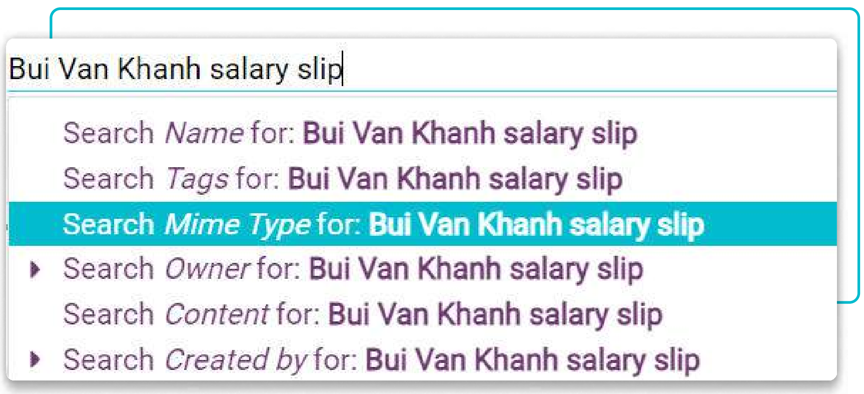


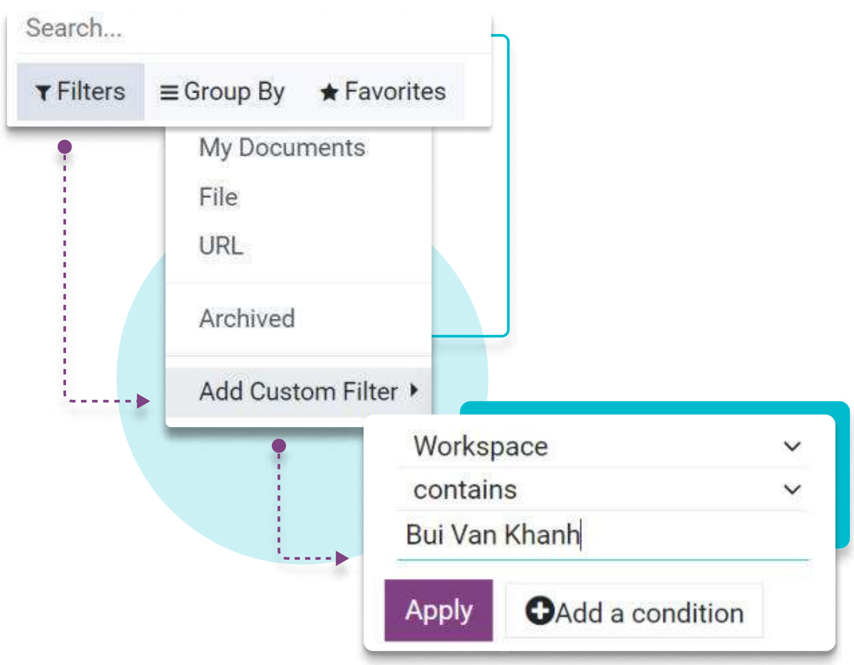
Search for documents

You can search for documents using the following tools:

Search bar

Documents and stored links can be easily found using the filters and grouping tool on the Viindoo search bar. With this feature, you need to type a keyword into the search bar (E.g. title, document tag, etc.) located on the top right corner of the screen to filter out records.





Filters and groups

To search for a certain document, for example, those related to a purchase order, go to **Documents ‣ Filters ‣ Add Custom Filters**, select the **Workspace contains** filter and add the purchase order reference of the document you are searching for. Then press **Apply**.

Documents related to the selected purchase order will be filtered out.

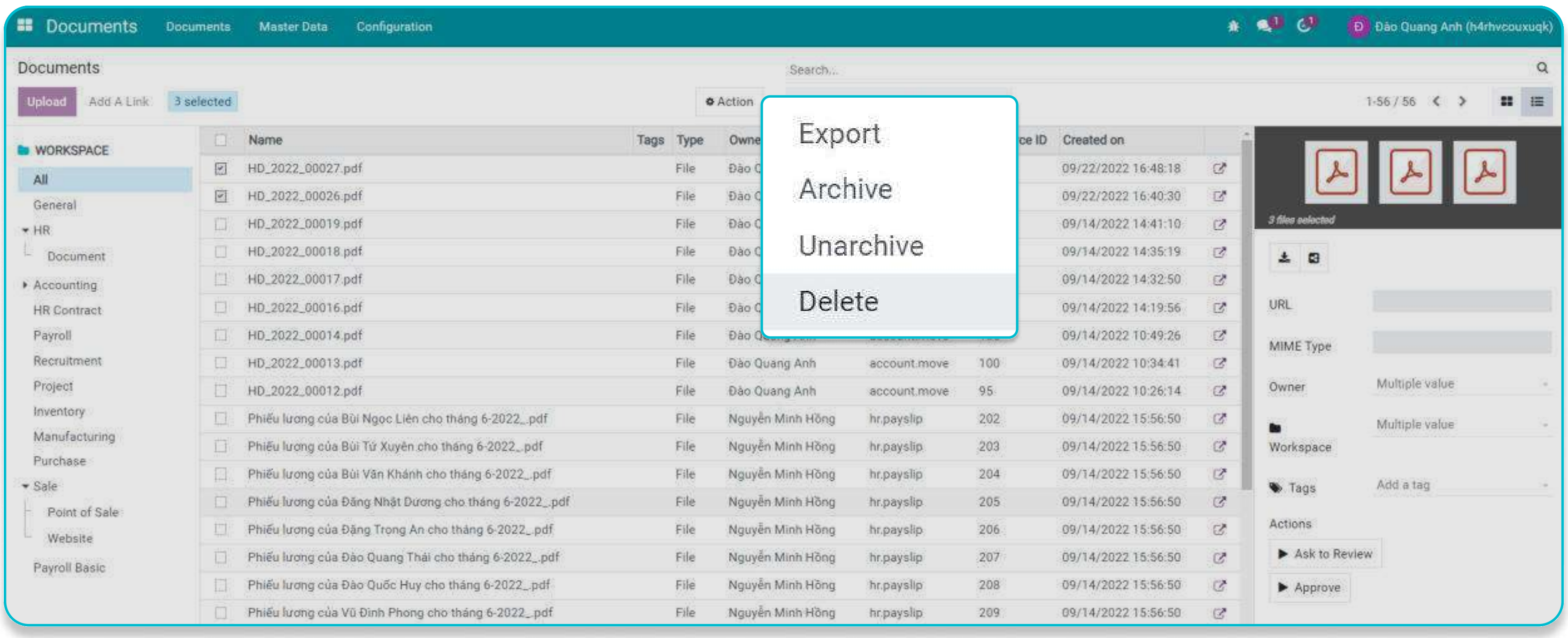
Delete document

In case you make a mistake in uploading document to the system and want to delete it, do the following steps:

Step 1: Navigate to **Documents**, select the workspace containing the documents that need to be deleted, and switch to the list view.

Step 2: Select the document you want to delete.

Step 3: Click the **Action** button then select **Delete.**



PROJECT MANAGEMENT

Project planning → **Project implementation** → **Project completion**

The Viindoo software helps businesses plan project implementation, manage personnel to carry out each task, monitor the progress of implementation, and record project revenue as well as expenses.

> ➡ *Check out Viindoo's suggestions for project management by job positions in Appendix: Project management. - (Page 136).*

PROJECT PLANNING

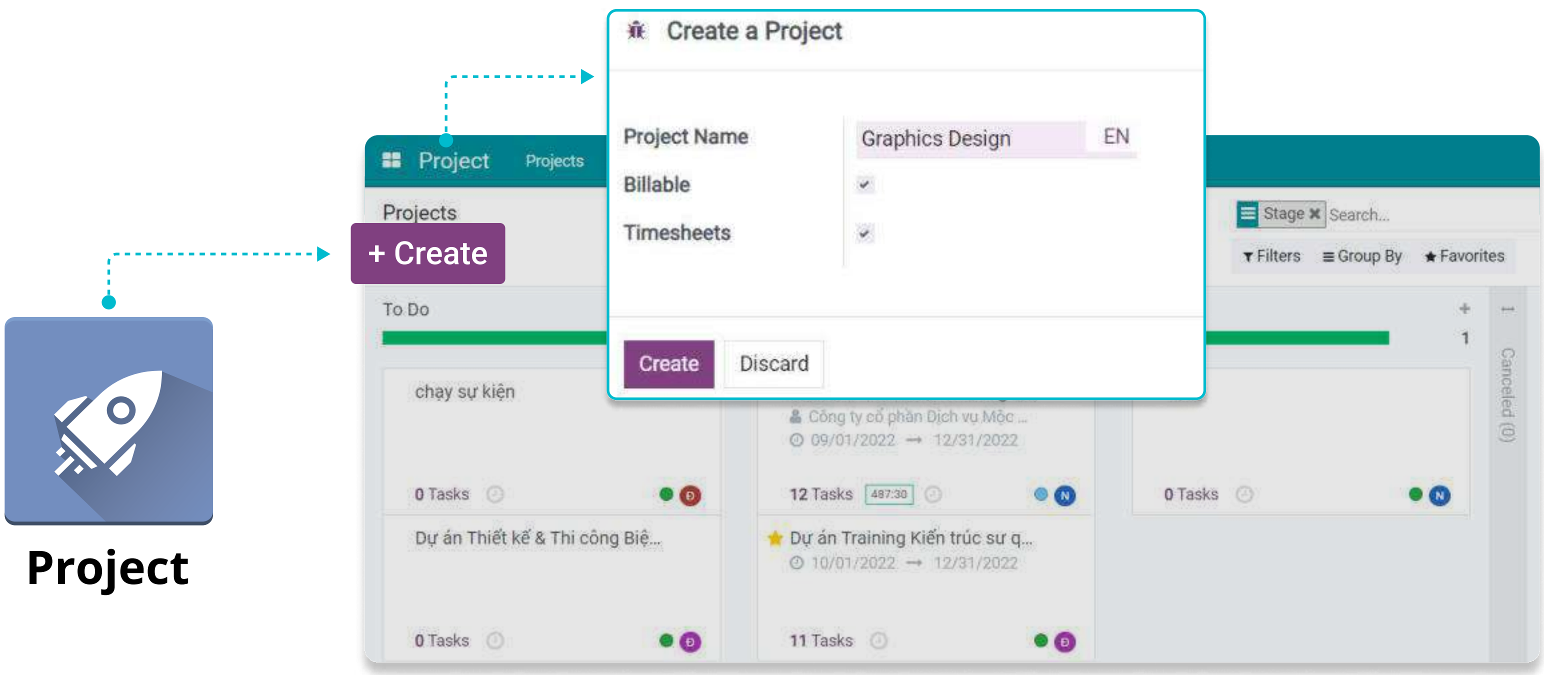
Project initiation → **Define the milestones for the project** → **Establish project member list and secure information** → **Plan the project implementation**

Project creation

At the beginning of the project implementation, the project manager needs to configure the most basic information about the project on the software.

Create a project

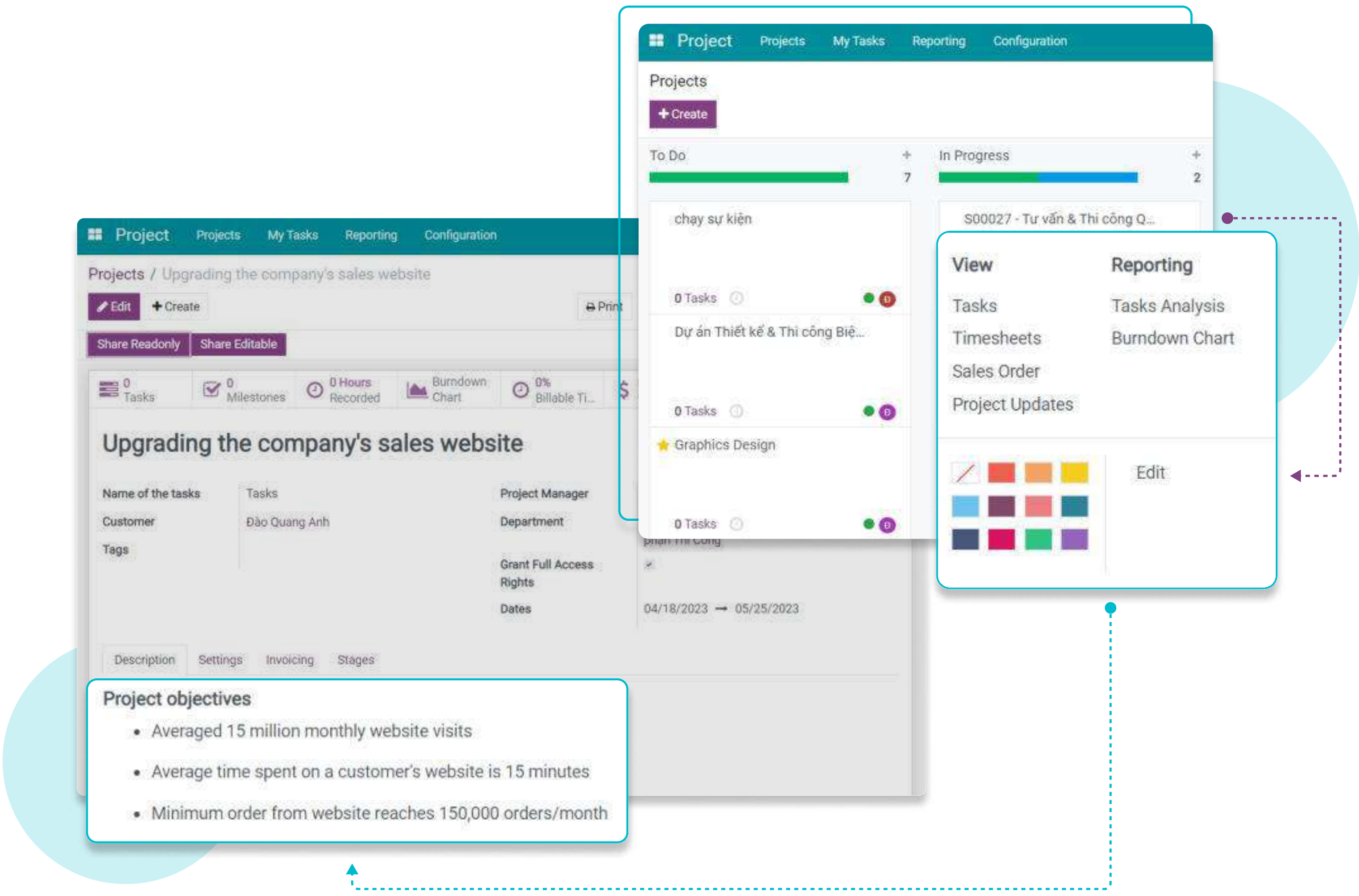
Navigate to the **Project** app, click **Create** to create a new project, and then enter the name of the project.



Enable the **Timesheets** box if you want to record the actual working time of employees. Then press the **Create** button to complete the process.

Set goals for the project

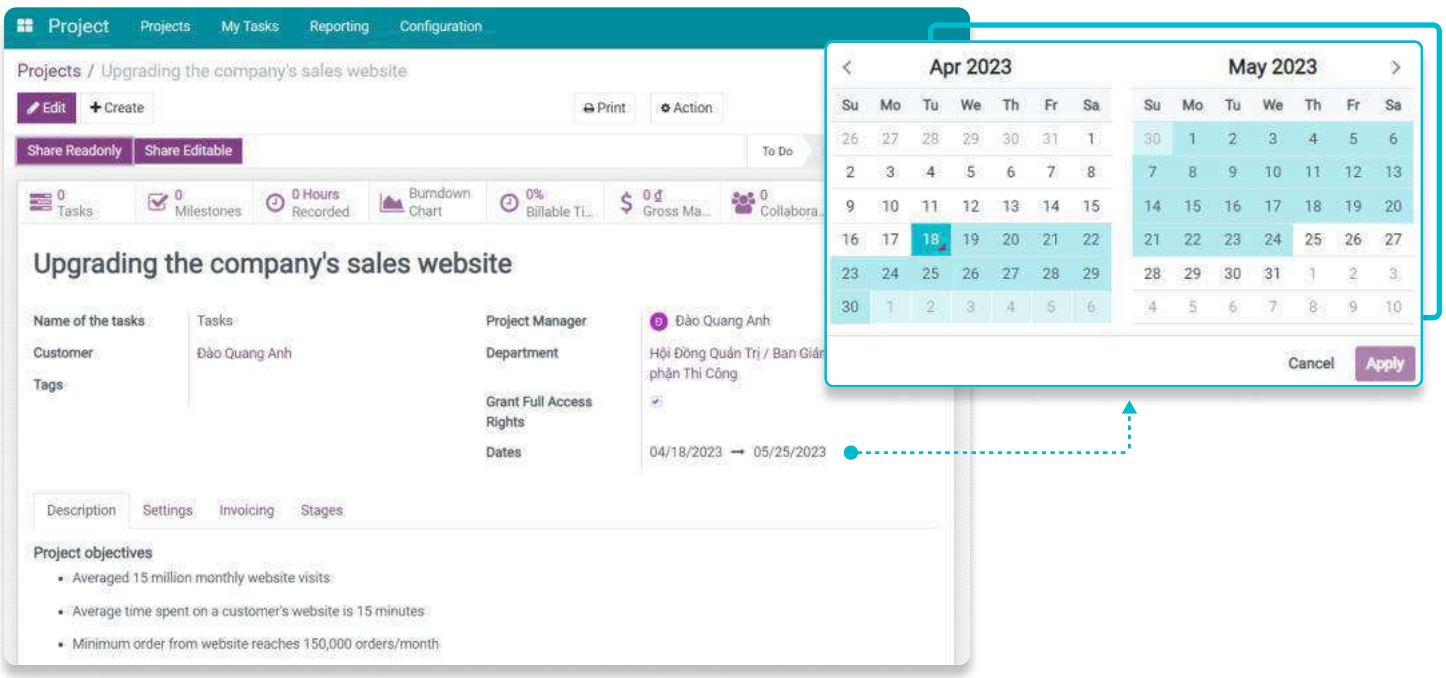
Determining project goals helps project managers organize and adjust the project-related tasks effectively and logically. Navigate to the **Project** app, select a project, then click on the three-dot icon and press **Edit**.



In the **Description** tab, add details about your project goals. You can use the software's editing tools to write and edit your project goals according to your needs.

Schedule project timeline

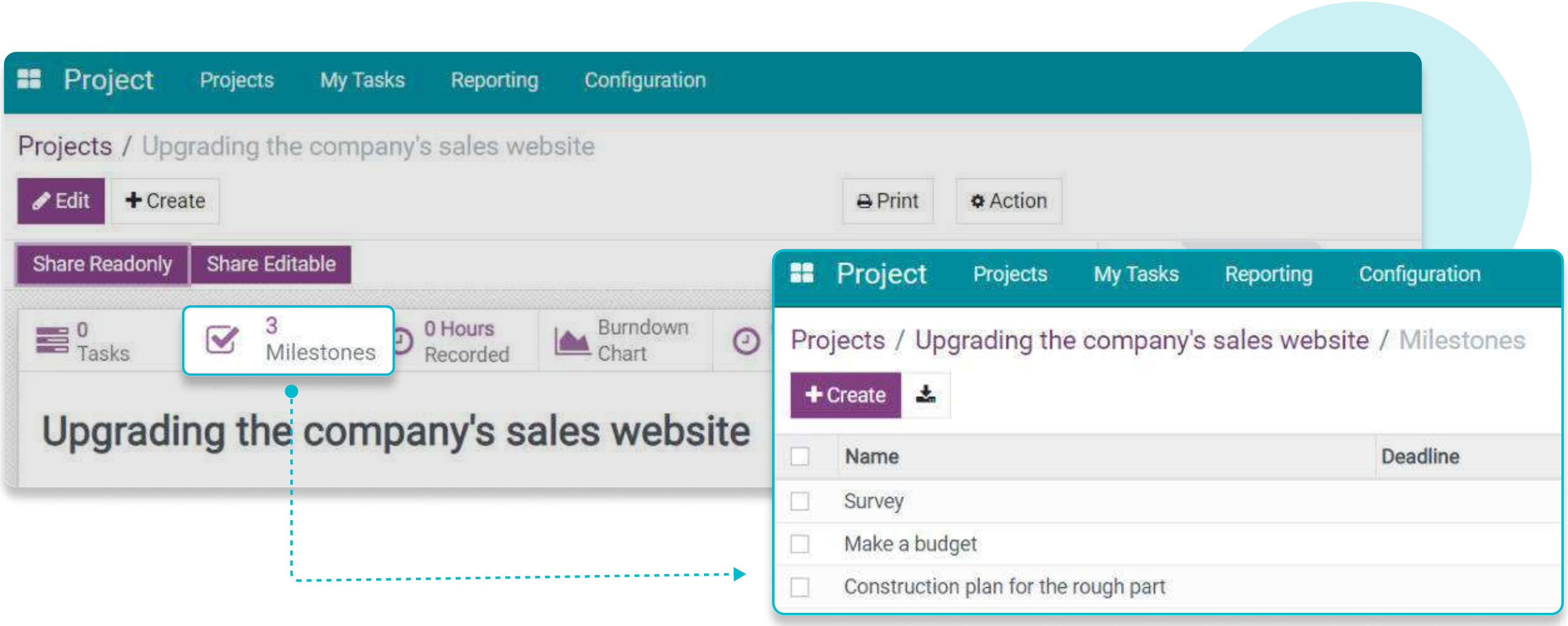
On the project interface, in the **Dates** field, select the start and end dates of the project, then press **Apply**.



Define the milestones for the project

Project milestones are checkpoints to highlight a certain point on a project timeline, which helps project managers control the overall project progress. These milestones can be the start date or end date of a project or significant achievements that need to be completed during the project.

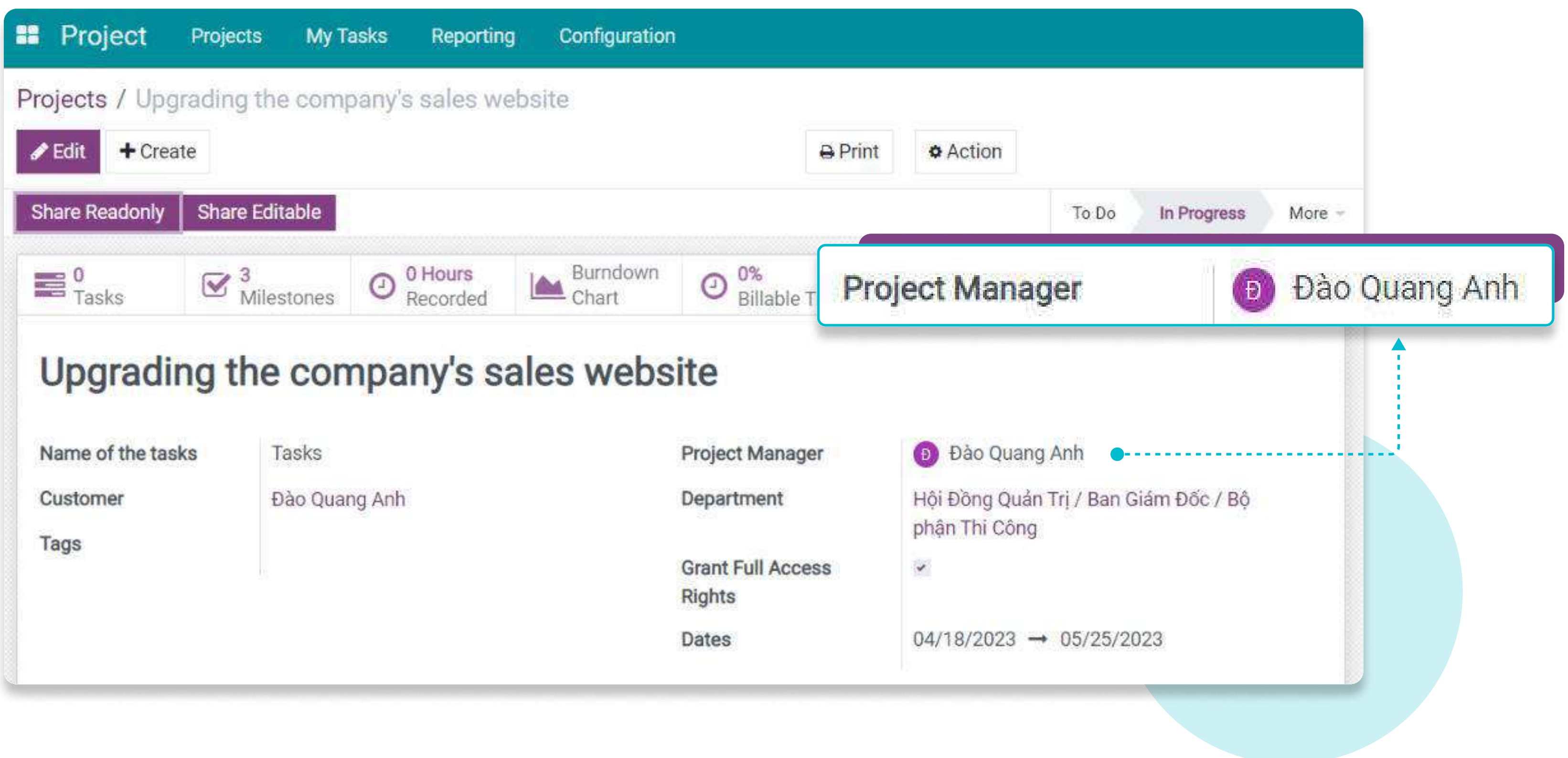
On the project interface, click on **Milestones** then press **Create** to set up a milestone.



Establish project member list and project information security

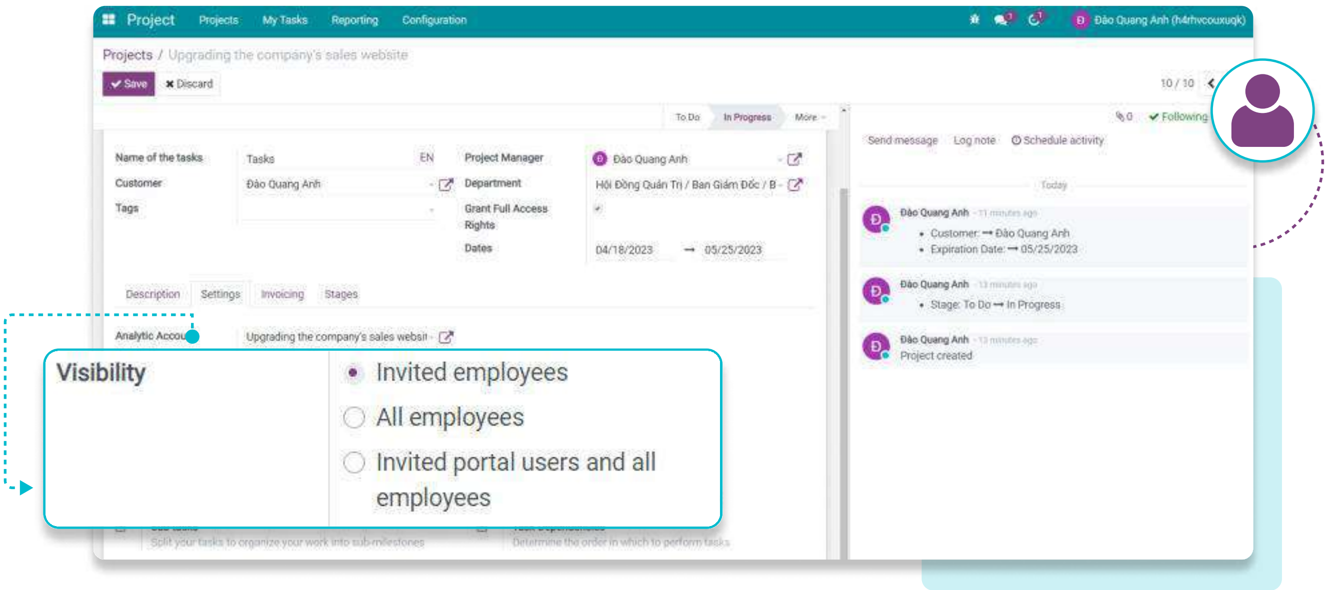
Assign a project manager

Returning to the project interface, in the **Project Manager** field, you can assign a project manager for this project.



Add project member list and set up project information security

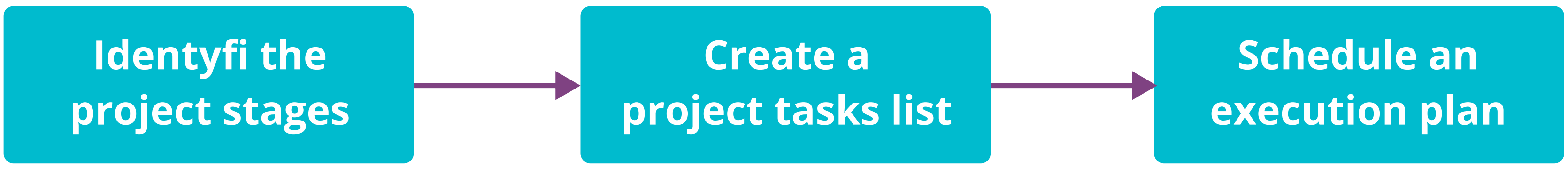
On the project interface, switch to the **Settings** tab and go to the **Visibility** section. Here, you can set up project information security as well as invite project members.



- *Invited employees:* Select this option if you want only project members to be able to view and interact within the project. You can add the project member list by selecting the icon , entering the list of members and pressing **Add Followers** to complete.

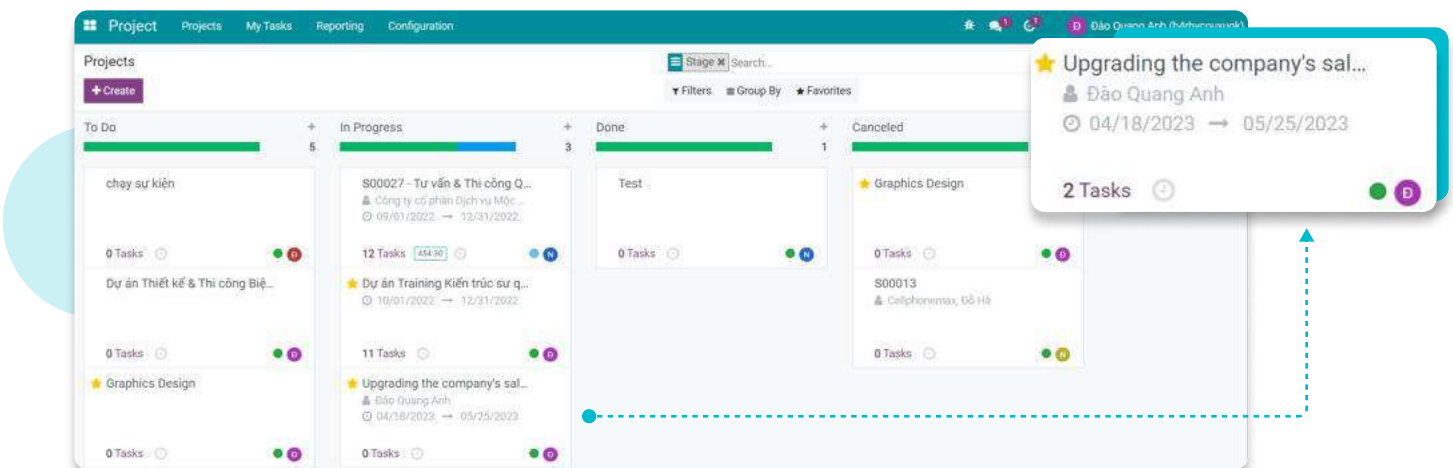
In addition, you can choose **All employees** if the project requires the participation of all members of the company. Or select **Invited portal users and all employees** if your project requires the participation of both customers and all employees.

Plan the project implementation

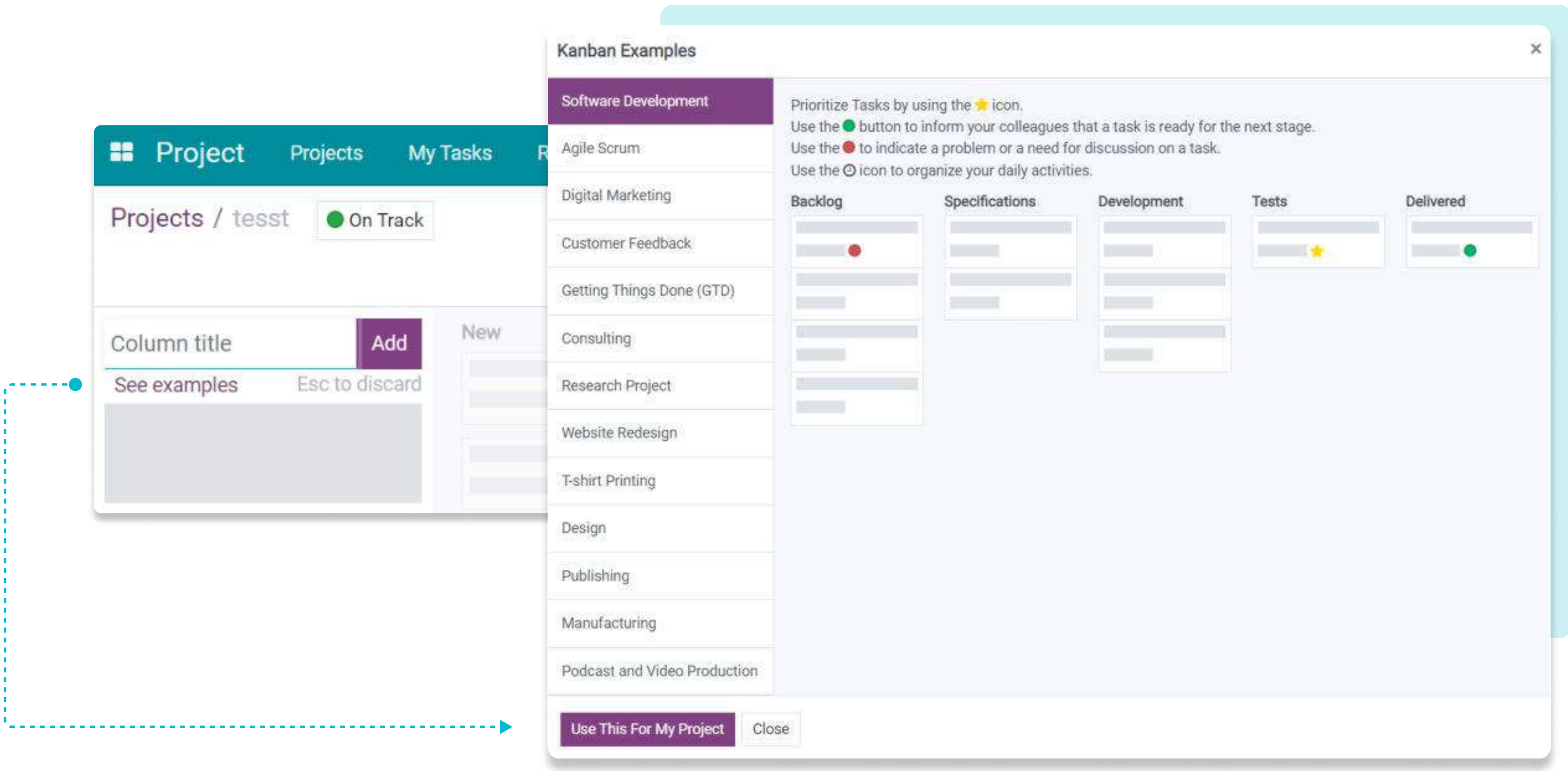


Identify the project stages

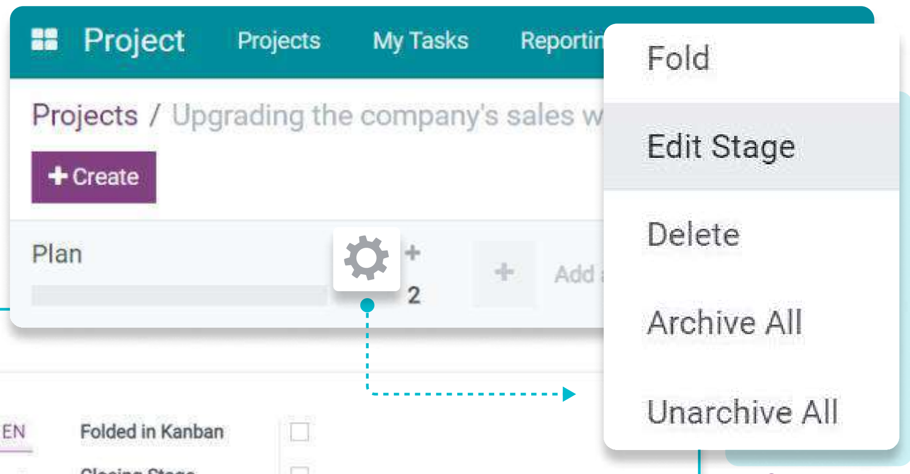
The project manager needs to determine the stages that the project will go through that are suitable for the process and their management style. Then, access the **Project** application, select the project you just created, add a name for the stage, then press **Add**.

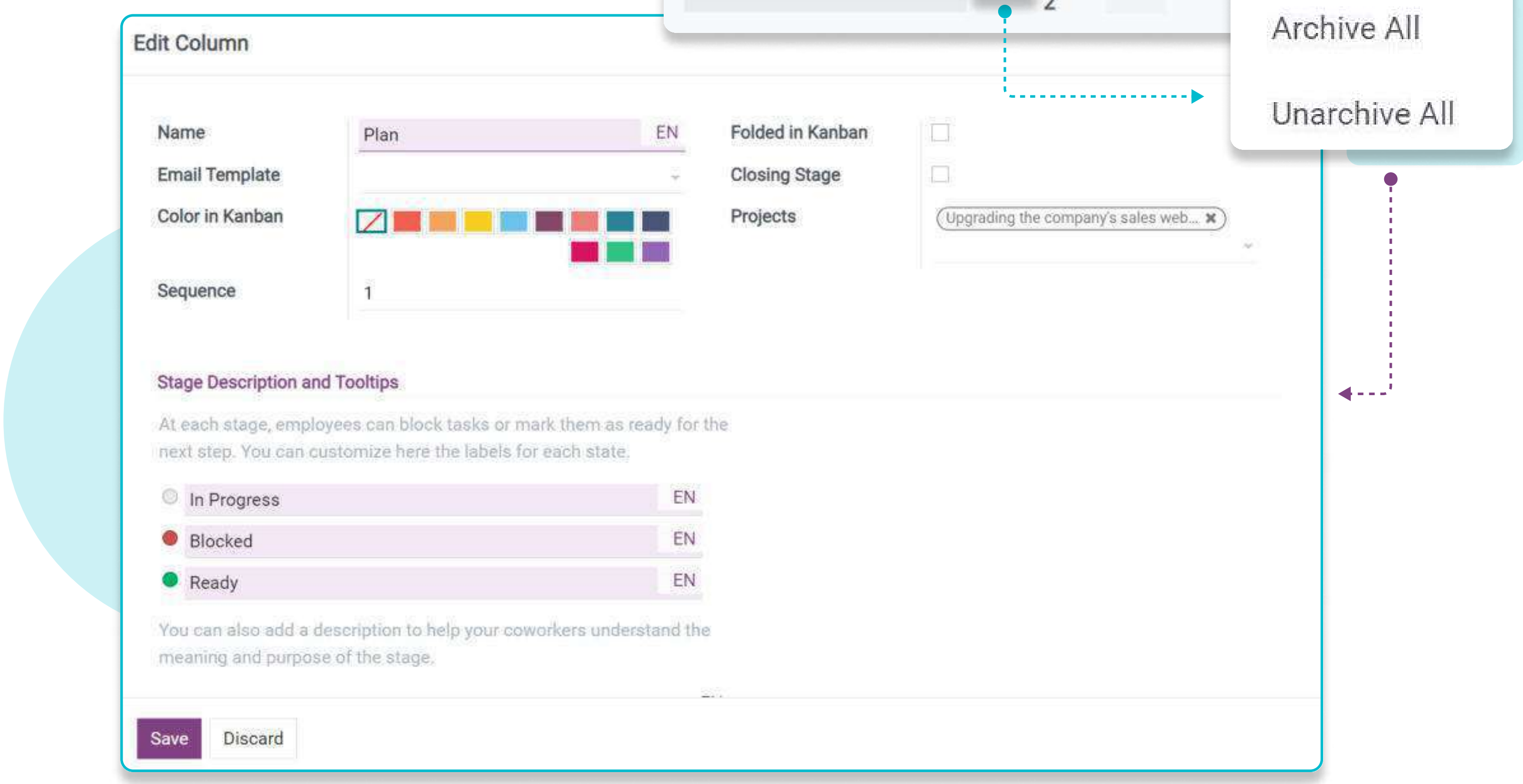


You can also use the available templates suggested by Viindoo. You click on **See examples**, choose a template, and press **Use This For My Project**.



You can adjust the stages by clicking on the icon ⚙ at the stage you want to modify and selecting **Edit Stage**.



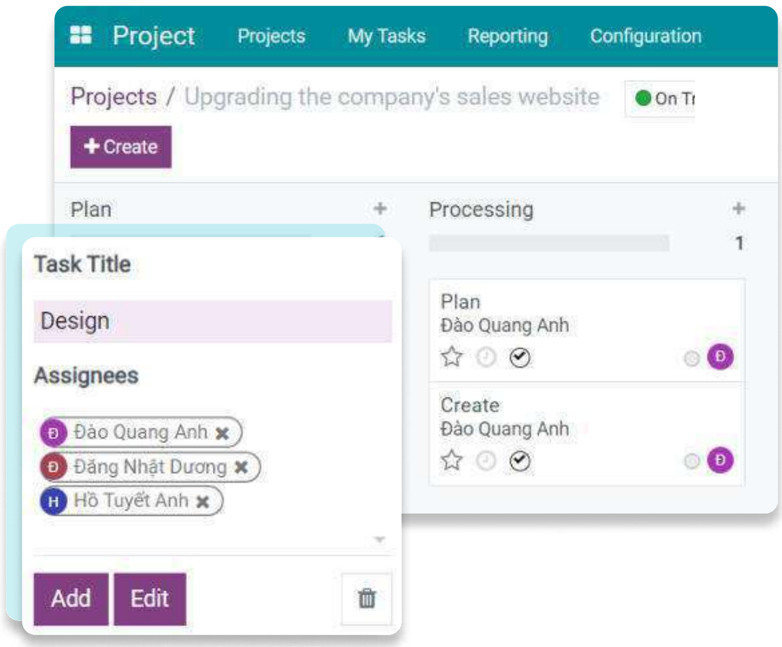


➡ See details at:

- *Configuring stages for tasks.*

Create a project tasks list

After setting up the project stages, start creating a list of tasks for the project by clicking on **Create** on the project interface:

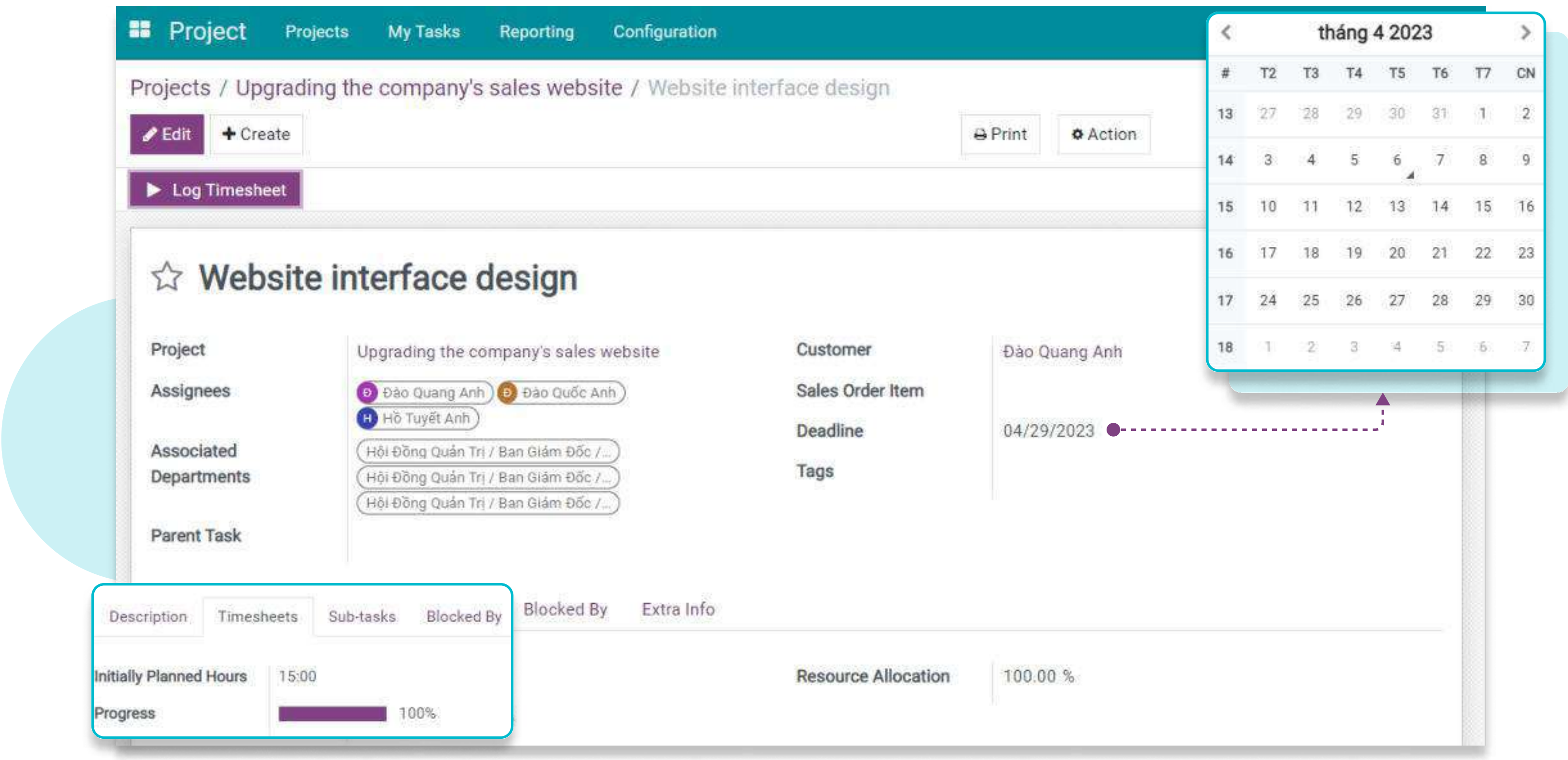


Schedule an execution plan

For each task, you can plan its execution by specifying information such as initial planned working hours, deadline, start/end dates of the task, etc. With this data, you will have information to evaluate the effectiveness of the project members' work at the end of your project.

Configure initially planned hours and deadline for the task

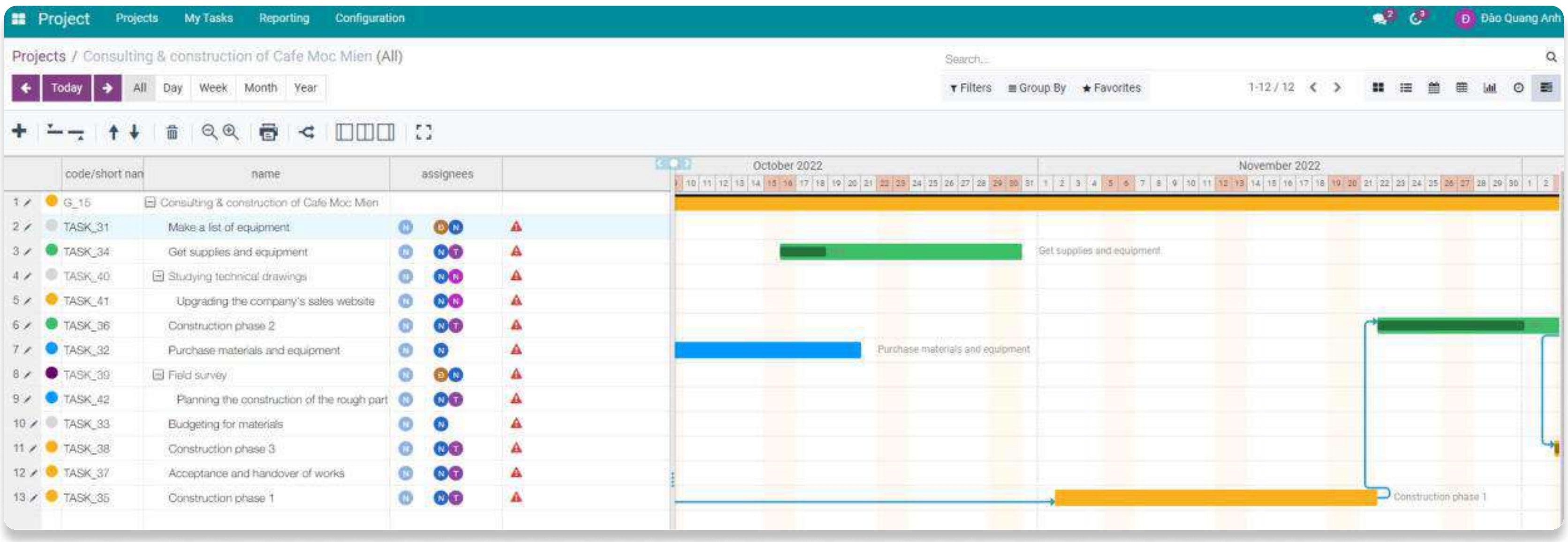
Navigate to the **Project** app, select the task to plan, navigate to the **Timesheets** tab, and enter the estimated hours for the task in the **Initial Planned Hours** field.



In the **Deadline** field, you set a deadline for completing this task.

Plan the start/end of a task with Gantt chart

The Gantt chart is a perfect method for planning projects with simple tasks, few dependencies, and easy identification of their duration and timing. To plan tasks with Gantt charts, click on the Gantt chart icon.

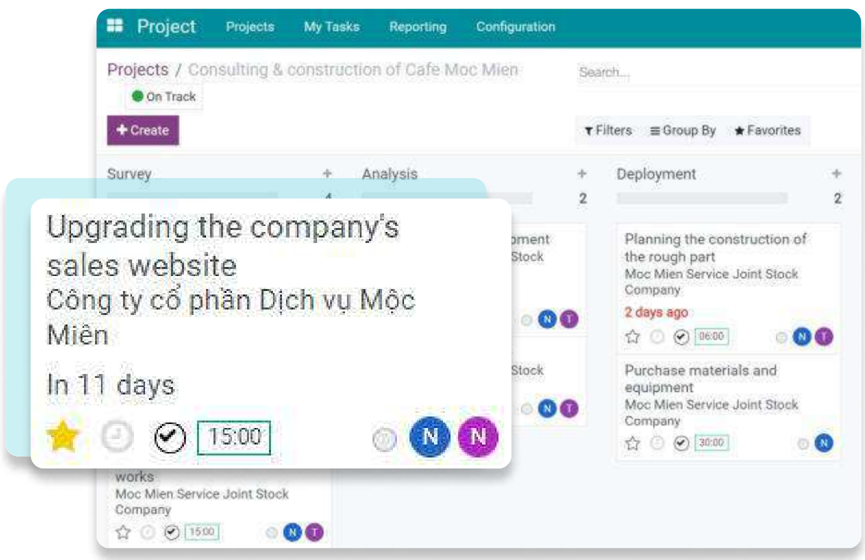


With this view, you can:

- Drag the progress bars of the tasks to the correct time slot where you have scheduled to complete them.
- Change the task duration by hovering over the end of the progress bar until the double arrow icon appears, then drag the progress bar to the desired time point.

Mark the important tasks

You can mark important tasks with a star for easy identification and attention. In the task interface of the project, click on the star icon to mark them. The starred tasks will be displayed at the top of the project.

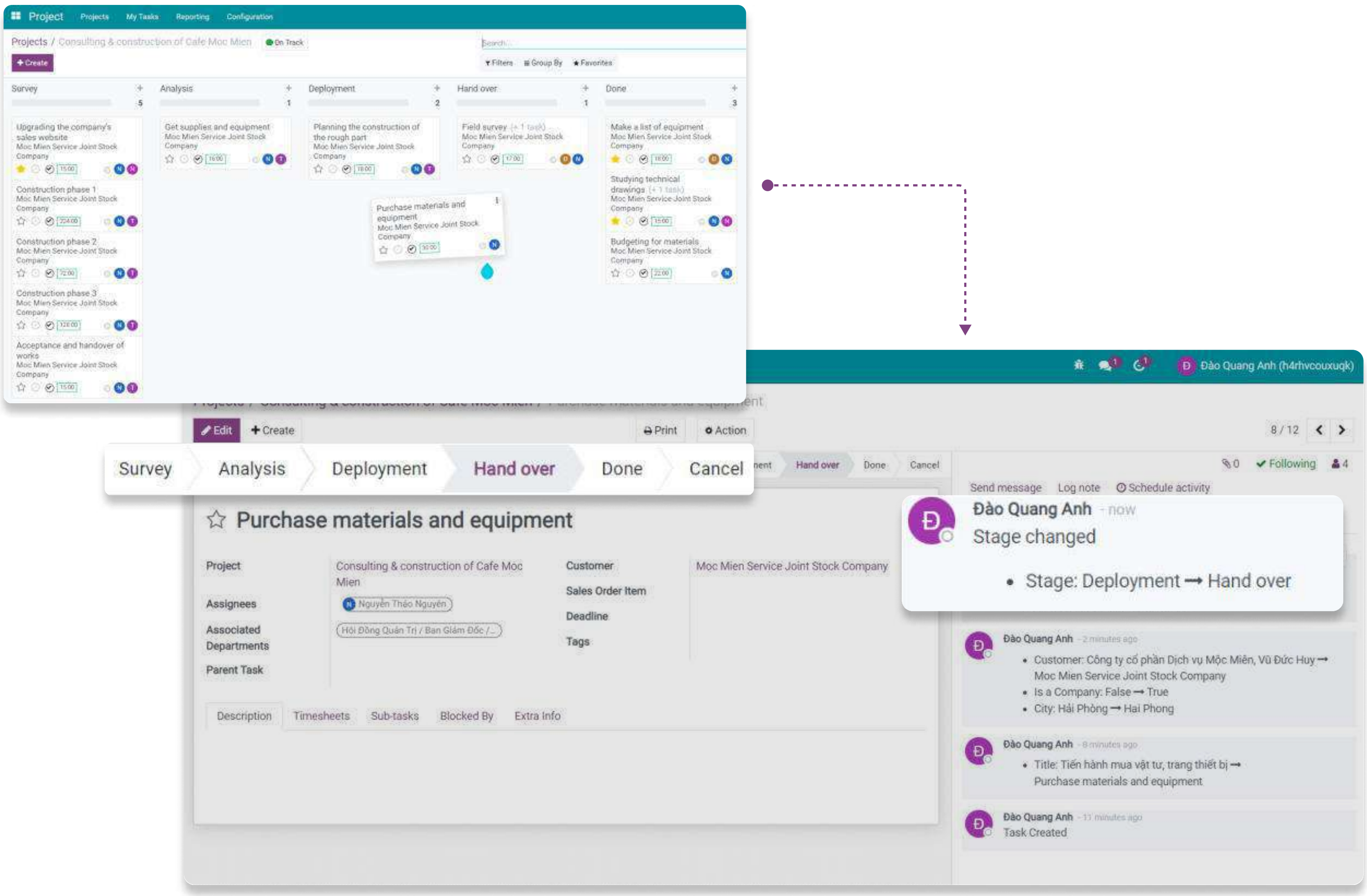


PROJECT IMPLEMENTATION

For project members

Update task progress

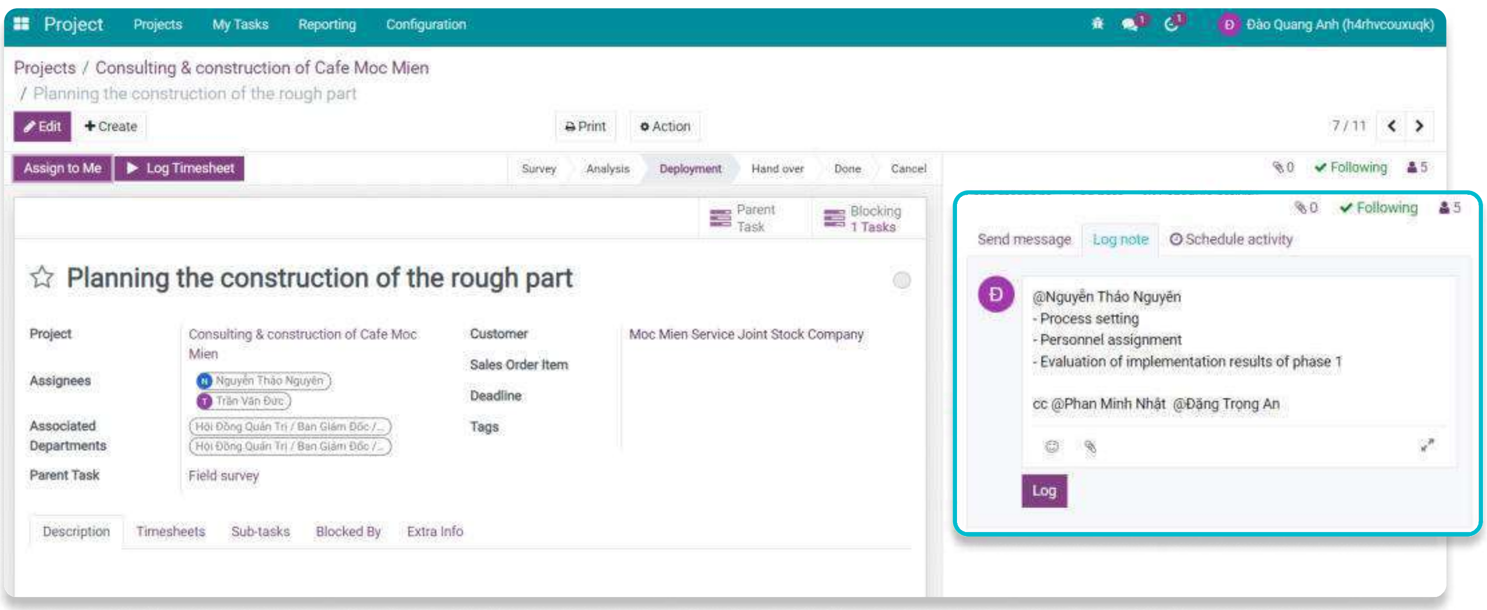
When starting a task or when your task meets the criteria to move to a new stage, you can change the stage by dragging and dropping tasks to the new stage on the Kanban view or updating the task stage on the progress bar displayed on the task interface.



The task stage change history will also be recorded in the **Chatter** section.

Communication between project members

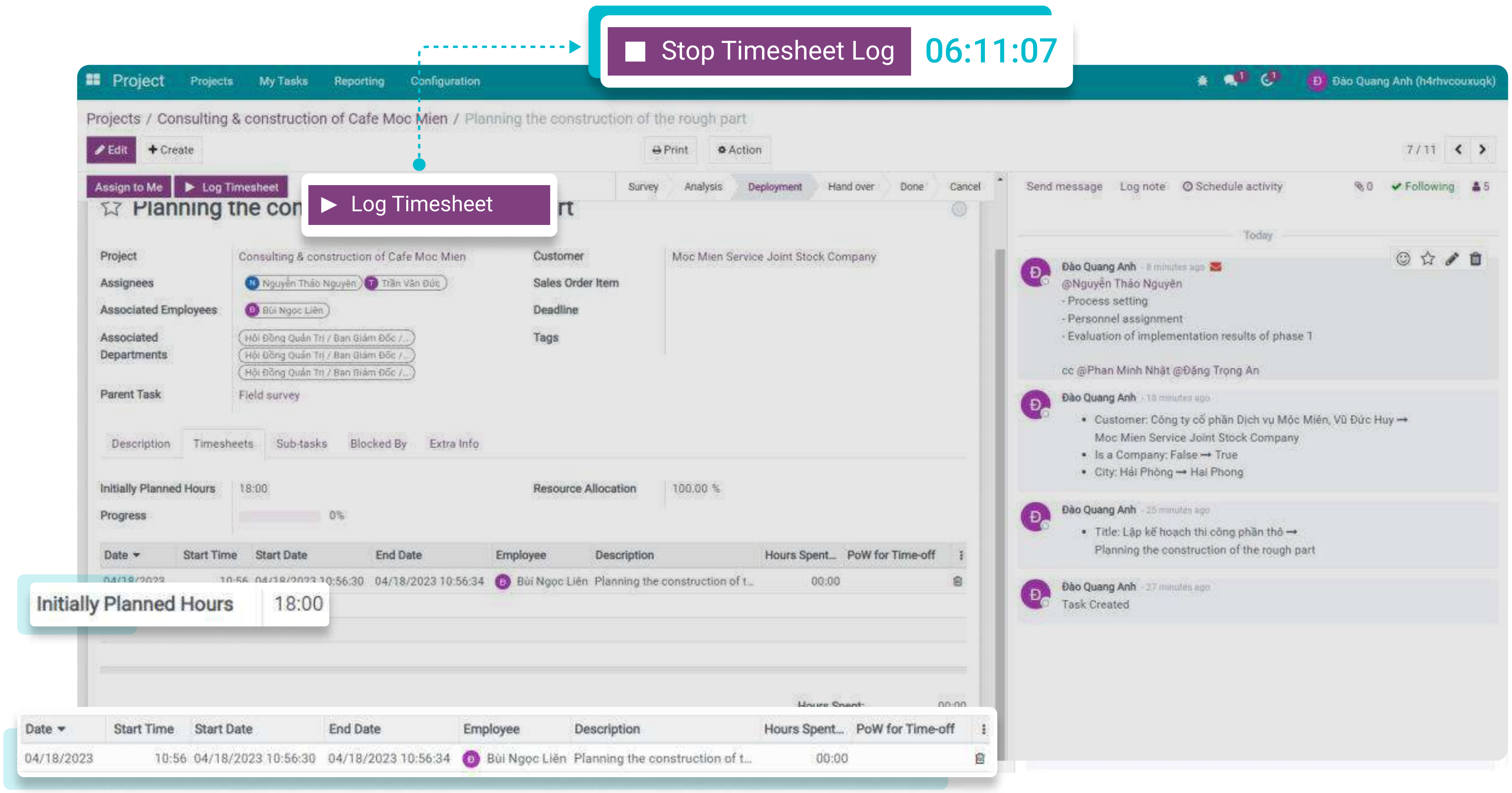
You can send a message or log note directly on each task tô interact and communicate with your project team members.



Time tracking

Viindoo software provides a timesheet tracking feature that helps you easily record the actual time spent on tasks, making it suitable for projects that need to record actual work time to calculate personnel costs or the actual working hours of employees.

Navigate to the **Project** app, and in the interface of the task being performed, click on the **Log Timesheet** button.



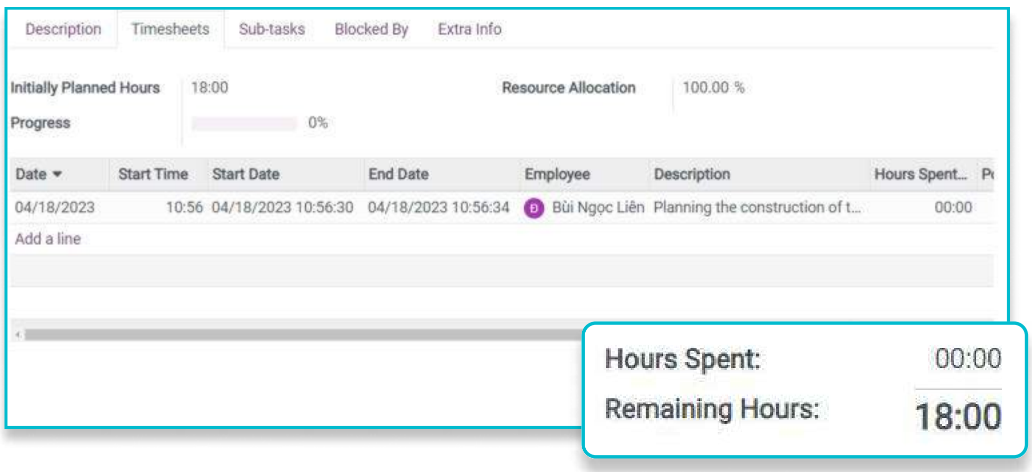
Note that you should only click this button when you start working on a project task. When you are not working on the task, click the **Stop Timesheet Log** button to record the actual time you spent on the task.

After logging the timesheet, the system will update your time tracking data for the corresponding task at the **Timesheets** tab.

In addition, you can also manually update the timesheet log for a task by clicking on the **Add a line** button and entering the information for your timekeeping. Once you have completed entering the information, click on the **Save** button.

After each time tracking entry, the system will automatically update the completion percentage on the **Progress** bar based on the **Initial Planned Time** and the total time worked.

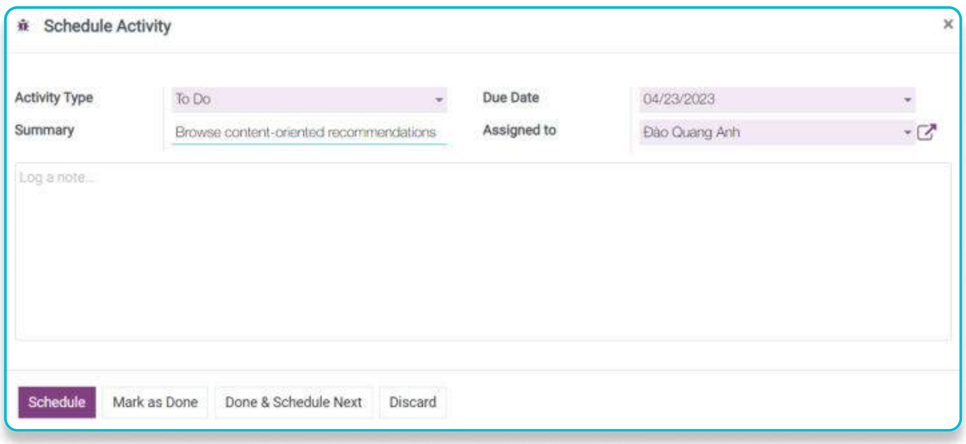
You can view the statistics of **Hours Spent** and **Remaining Hours** to decide whether to reallocate your time or speed up to complete the task.



Plan personal task execution

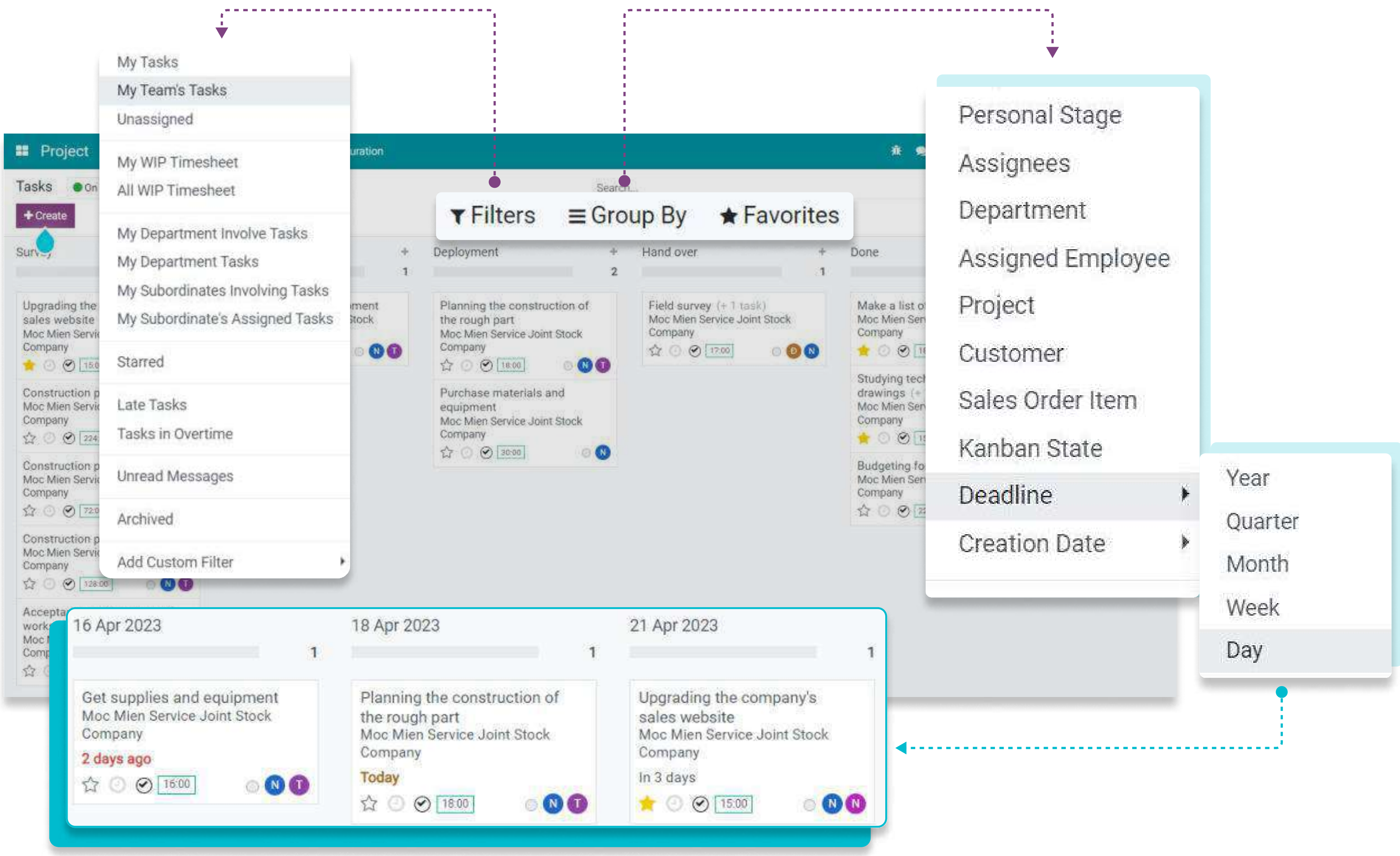
Planning personal task by using the Schedule Activity feature

You can refer to the Schedule Activity (Page 30) feature to avoid missing any tasks needed to complete the project. You can also schedule activities for the project manager to monitor the progress of your assigned tasks.



Managing personal tasks with filters and grouping features

You can use filters to find **Late Tasks, Tasks in Overtime**, etc. You can also combine filters to find the desired tasks.



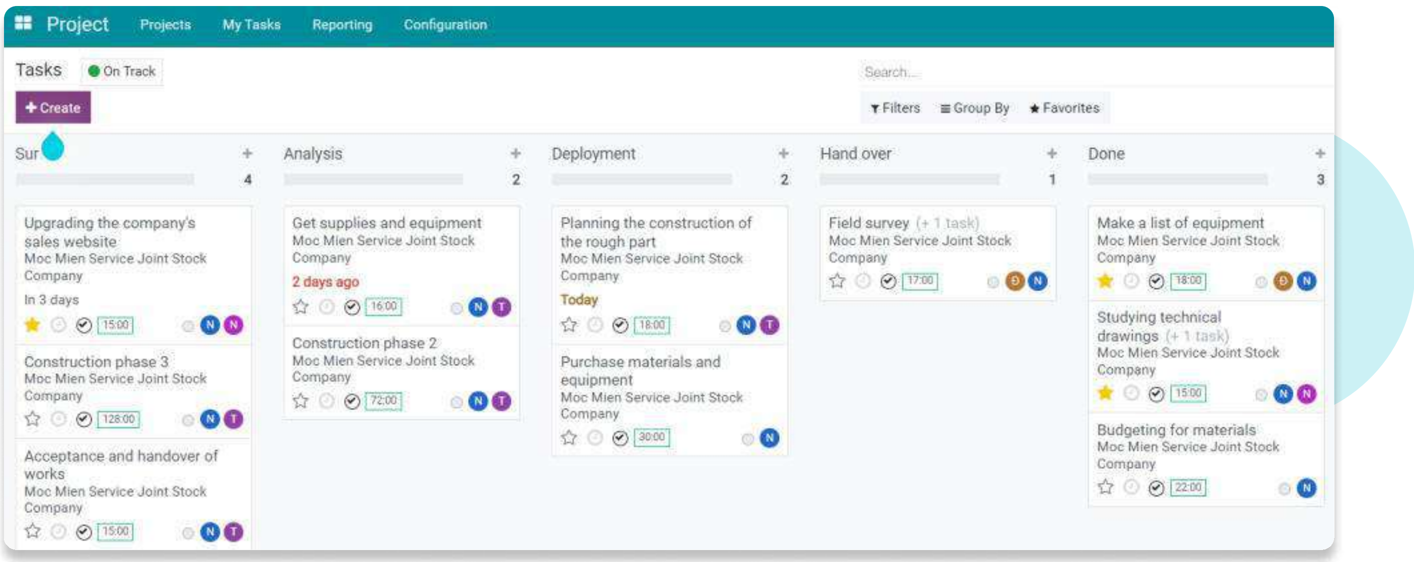
Additionally, you can use the **Group By** feature to group tasks such as by **Deadline** to quickly see tasks that need to be prioritized to meet the deadline.

Project Manager

Tracking project progress

Tracking with Kanban board

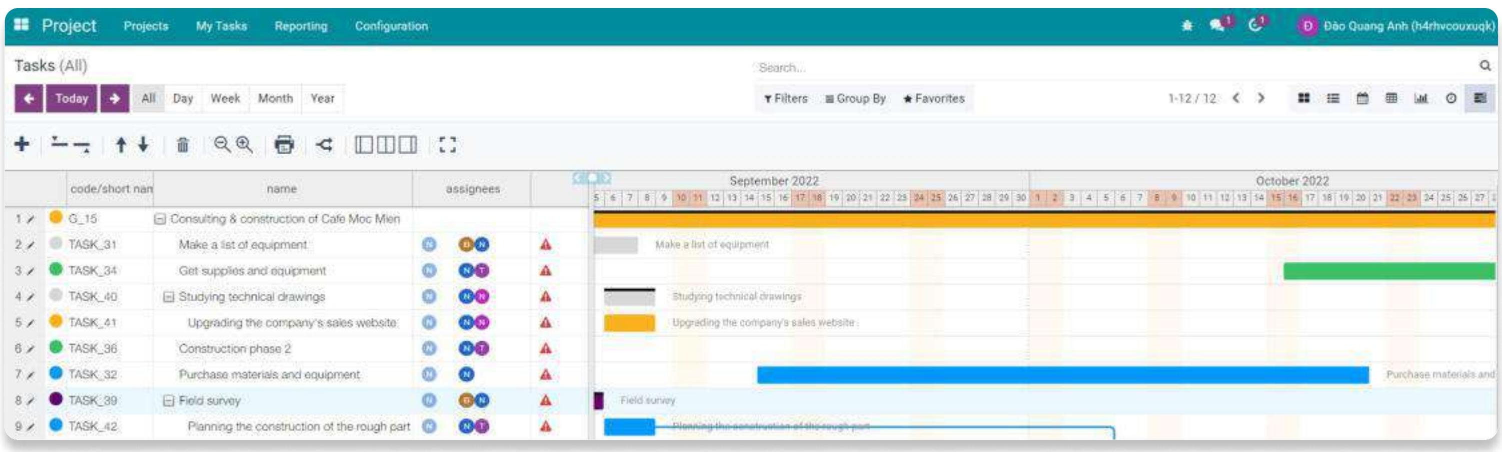
On the Kanban board interface, the project manager can easily grasp information on the progress of task processing, such as the number of tasks in each stage, the number of tasks still in progress, the number of tasks that have been completed, and so on.



Additionally, project managers can use filters and groups to manage tasks (page 45) within the project like managing individual tasks. Project managers can filter out tasks that are late or, important, etc. based on their management needs.

Progress tracking with Gantt chart

The Gantt chart is a powerful management tool that helps you plan and monitor the progress of project plans, especially for projects that are strict in terms of deadlines.

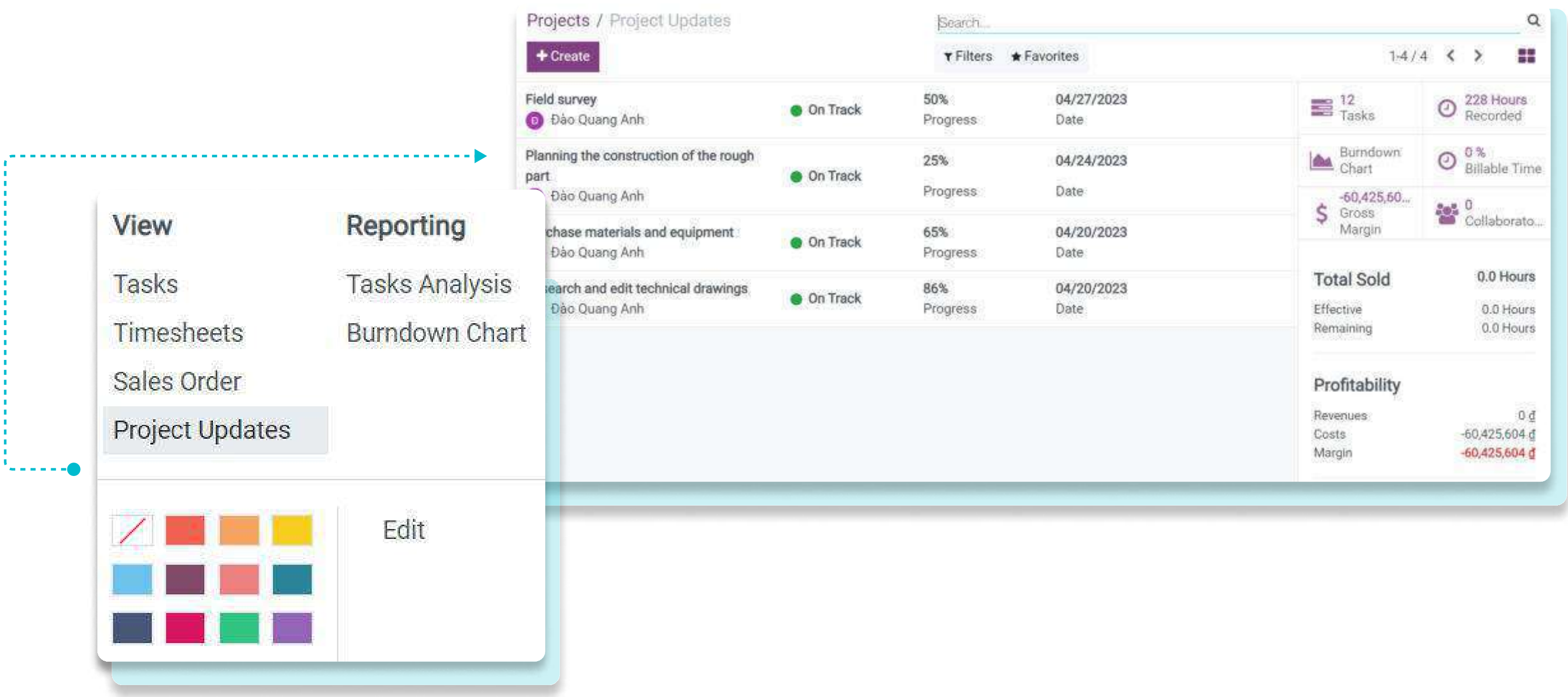


Gantt chart allows you to track the project progress in multiple aspects, such as:

- Current stage and completion percentage of each task, which allow managers to quickly and effectively control tasks' progress.
- Managers can compare the initially planned start/end dates with the current date or project milestones to evaluate the project's actual progress, and take actions at the right time to ensure project progress and deadlines are met.
- Managers can also change start/end dates or adjust task execution time to align with project milestones.

Regular update project information

During a project, the project manager needs to update the project progress weekly, or monthly, etc. To update the project progress, navigate to the **Project** app, select a project and click on the three-dot icon. Go to **Project Updates** and click on **Create** to create a new project update.

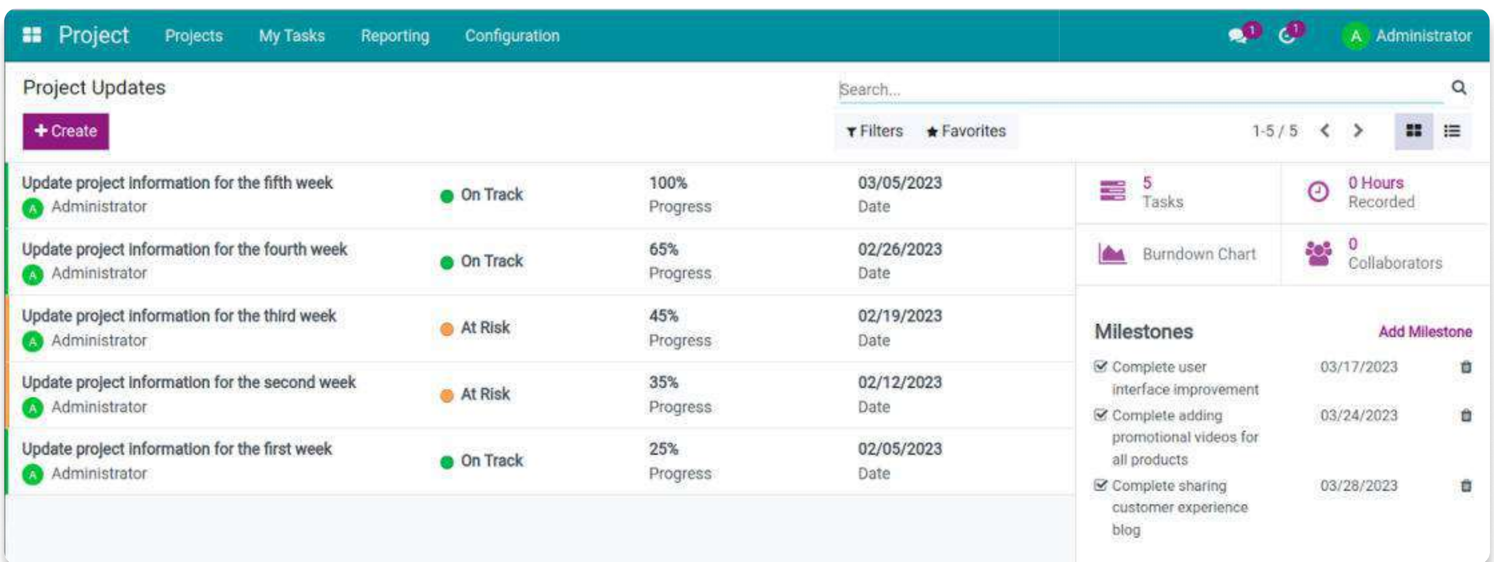


From here, you can update the progress of your project and check off the completed milestones.

PROJECT COMPLETION

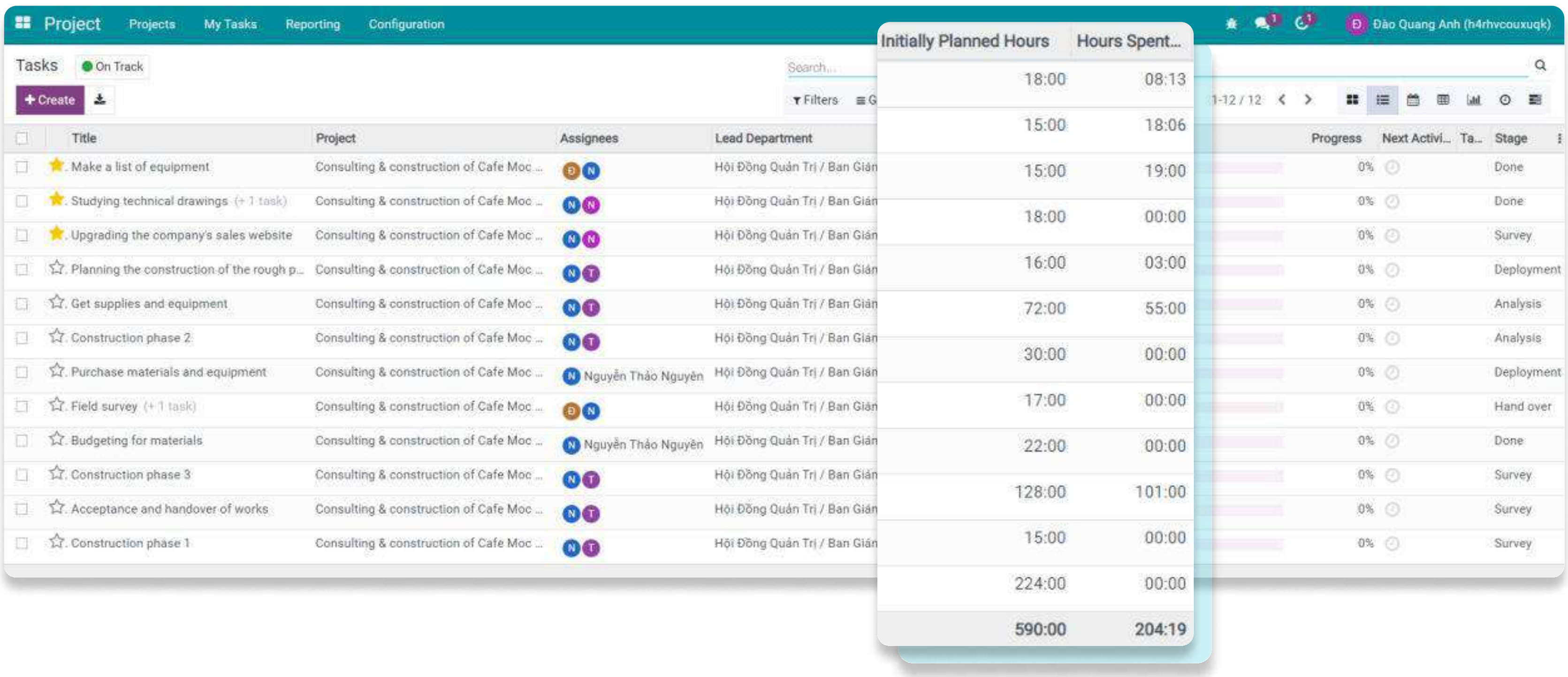
Overall project progress

In the **Project Updates** section, you have a summary of the project's progress with regular updates, such as which stage the project is delayed, which stage of the project has risks, and so on.



Comparison between expected and actual project execution time

Navigate to the **Project** app, switch to the **List** view to see the statistics of the initially estimated hours for the project and the actual hours used to complete it. If the actual hours used exceed the estimated hours, you need to identify the reasons and take those into consideration for future projects.

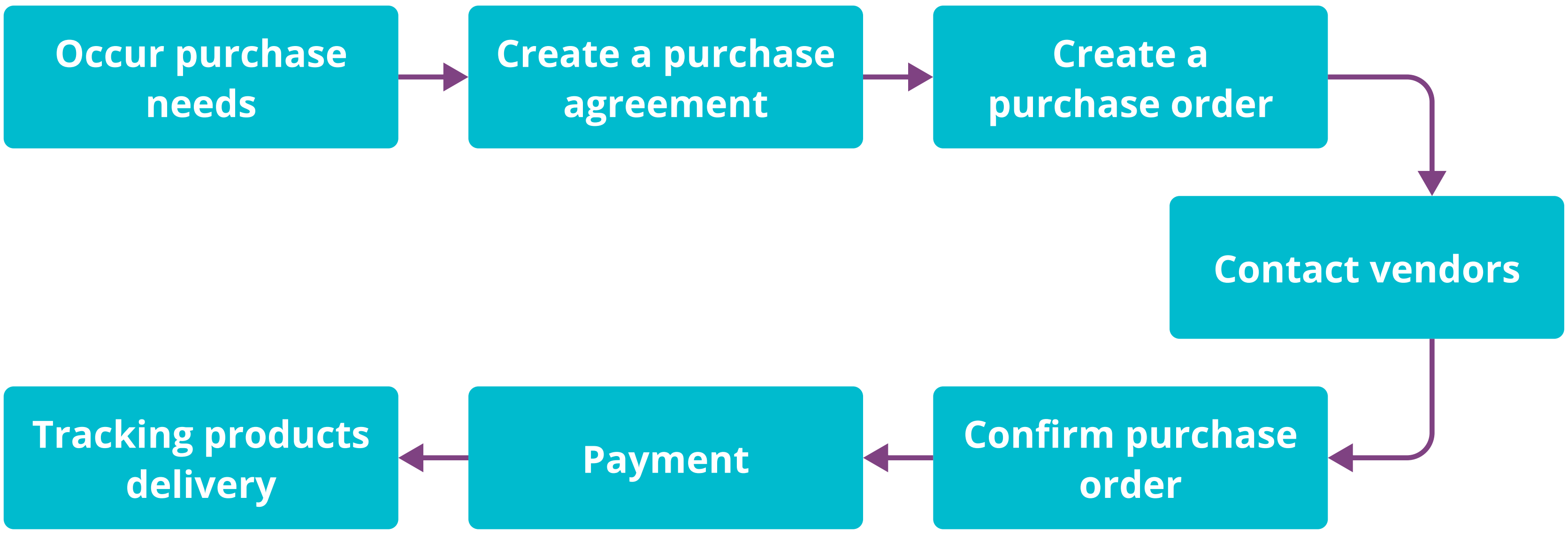


Project revenue and cost

➡ See details at:

- *Record project revenue.*
- *Record project cost.*

PURCHASE MANAGEMENT



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*.

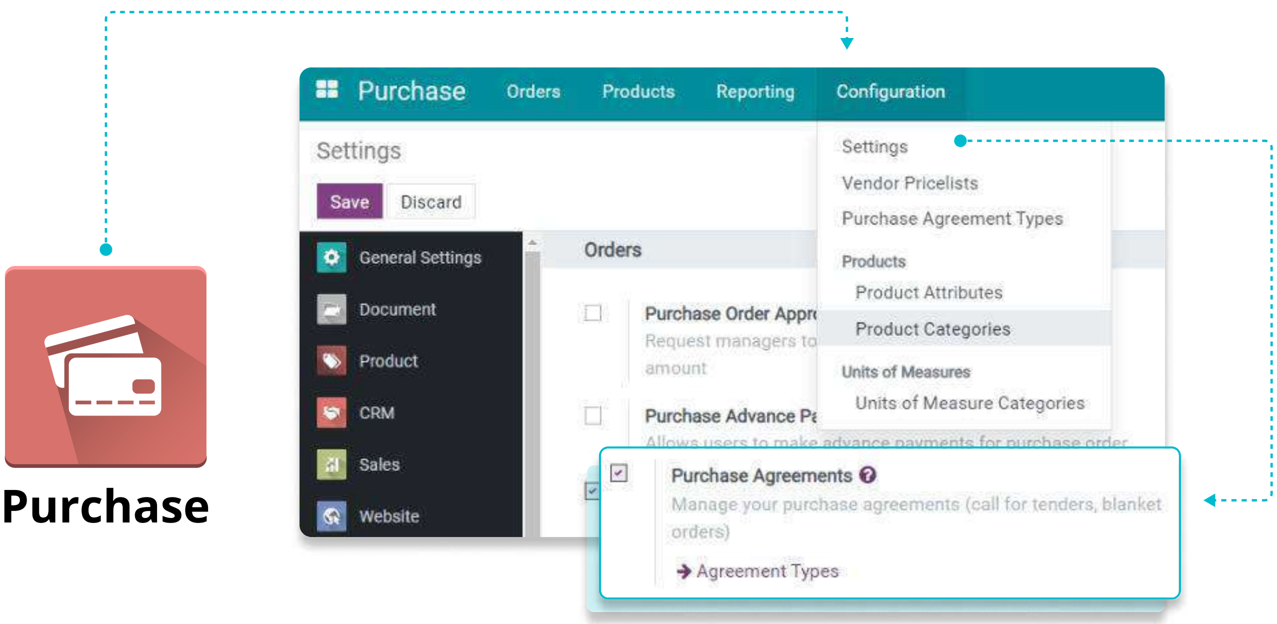
> ➡ *Check out Viindoo's suggestions for the purchasing management by job positions in Appendix: Purchase management - (Page 137).*

CREATE A PURCHASE AGREEMENT

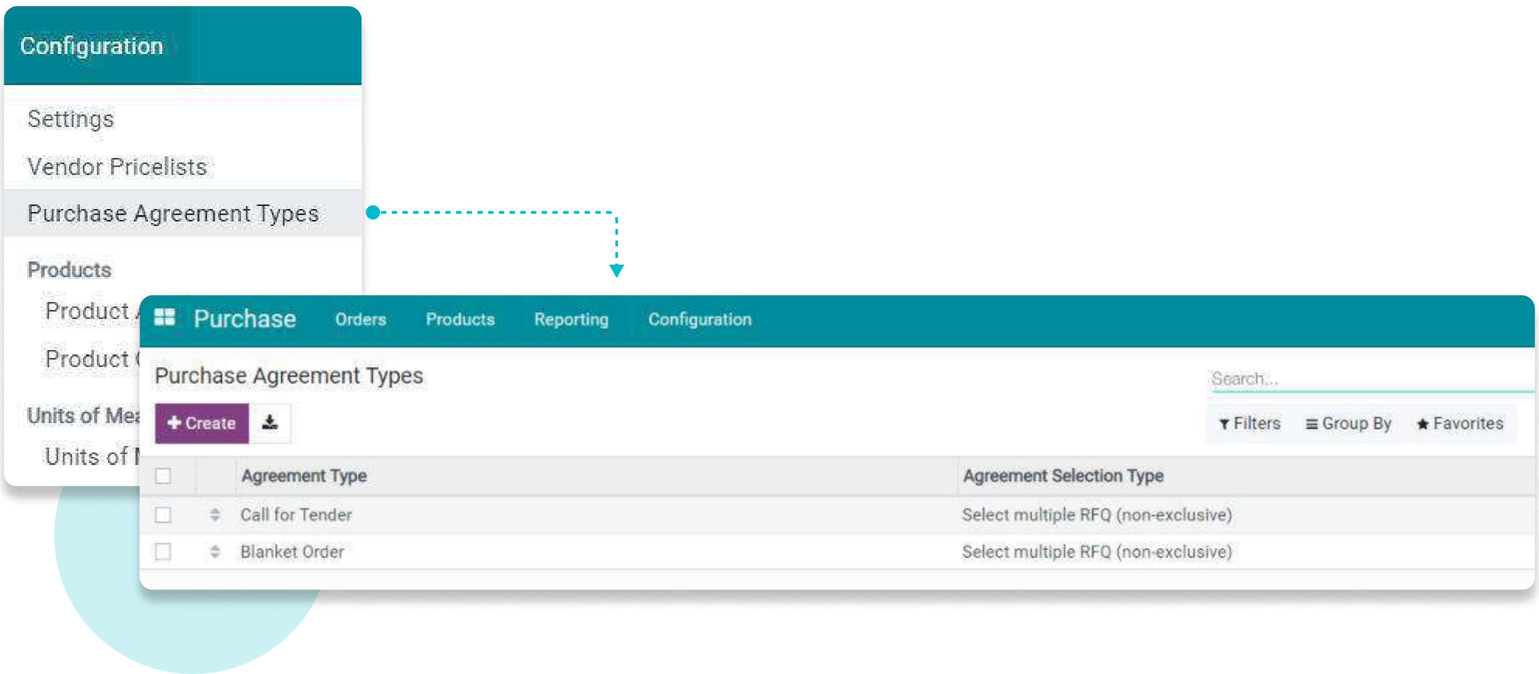
Viindoo software supports users with two popular purchase agreements: *Call for Tender* and *Blanket Order*. You should select the agreement that fits the procurement process of your business.

Activate the Purchase Agreements feature

Navigate to **Purchase** ‣ **Configuration** ‣ **Settings**. Then, select **Purchase Agreements** and press **Save**.



Go 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.*

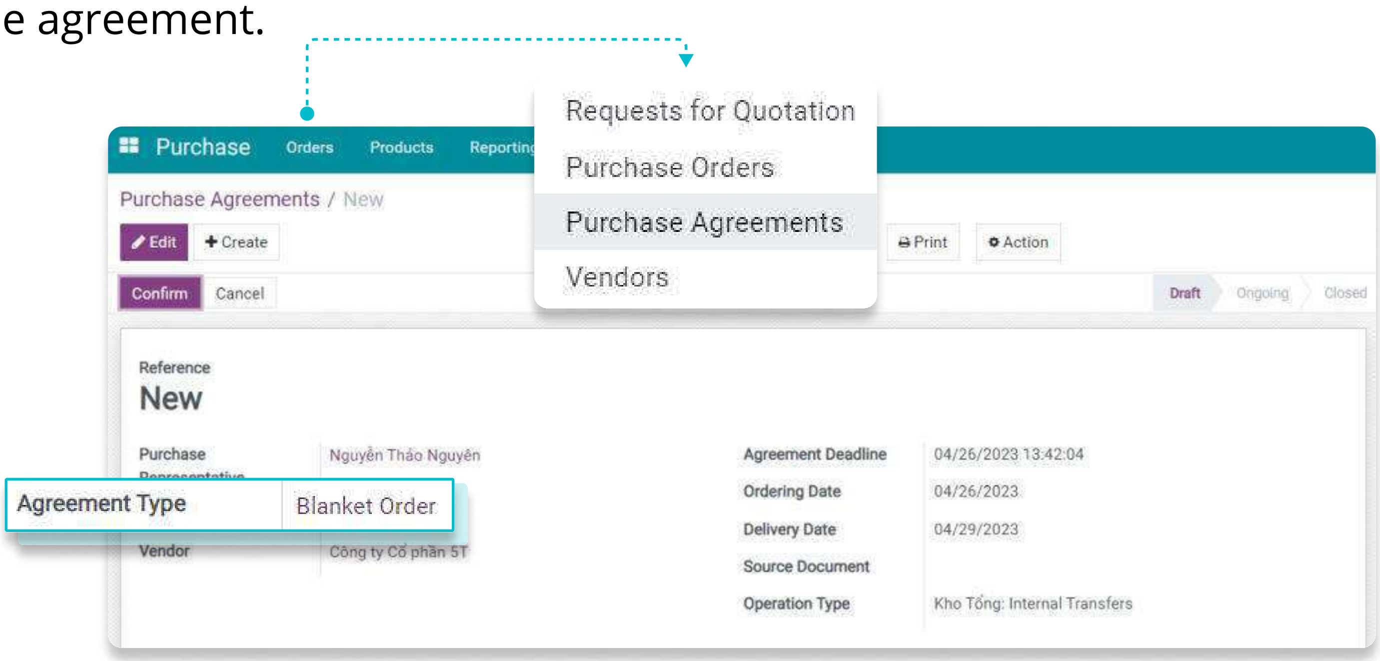
➡ See details at:

- *Configure Purchase agreement types*.

Create a blanket order

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

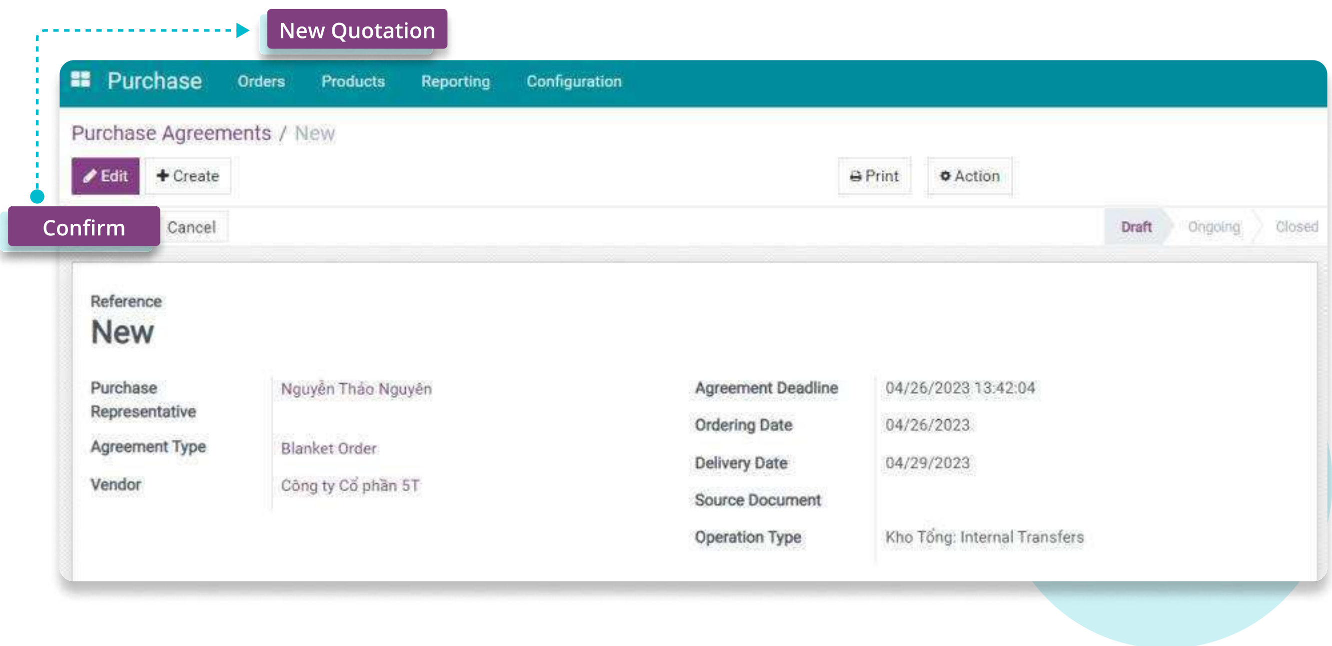
Navigate to **Purchase ‣ Orders ‣ Purchase Agreements ‣ Create** to create a Purchase agreement.



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

- *Purchase Representative:* By default, the creator of this purchase agreement will be pre-selected here but you can select other purchasing employees.
- *Agreement Type:* Select *Blanket Order.*
- *Vendor:* Fill in vendor information.

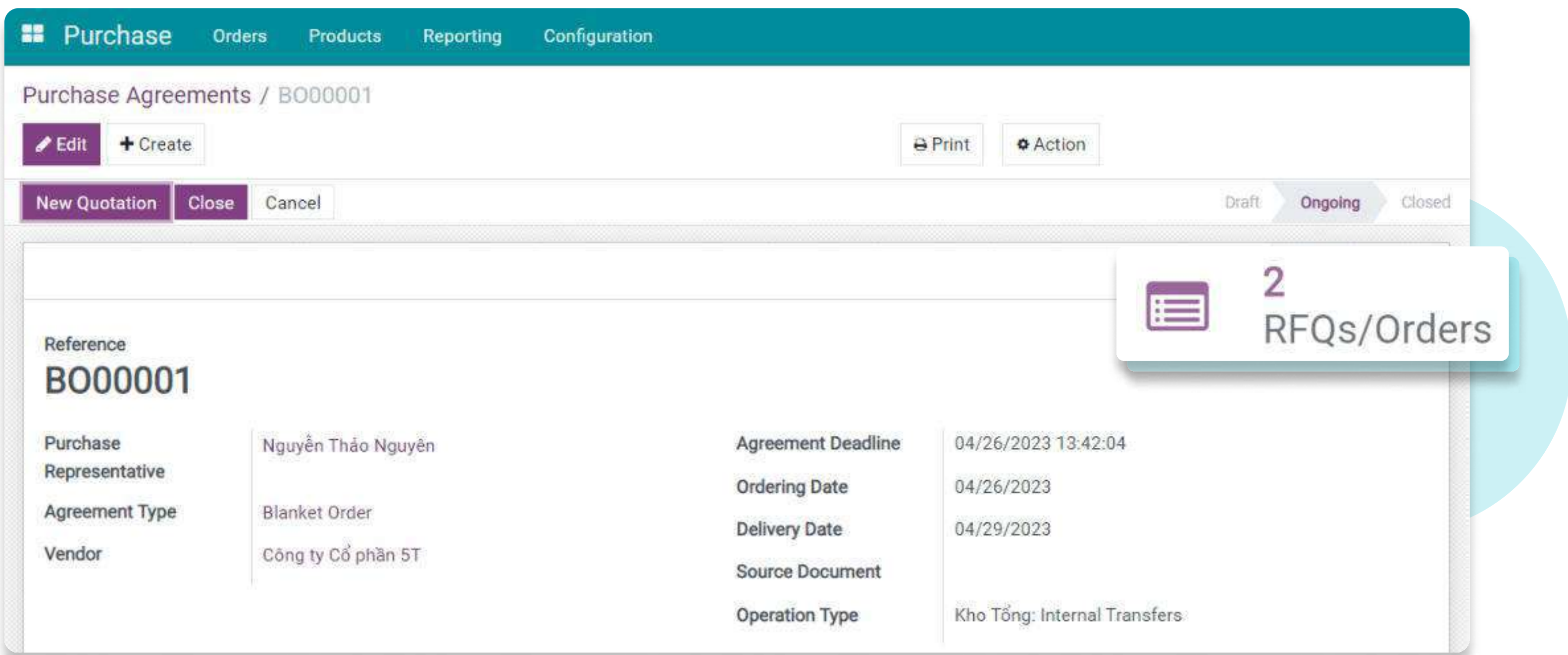
After agreeing on the purchase agreement with the vendor, add all the important information to the purchase agreement, then press **Confirm**.



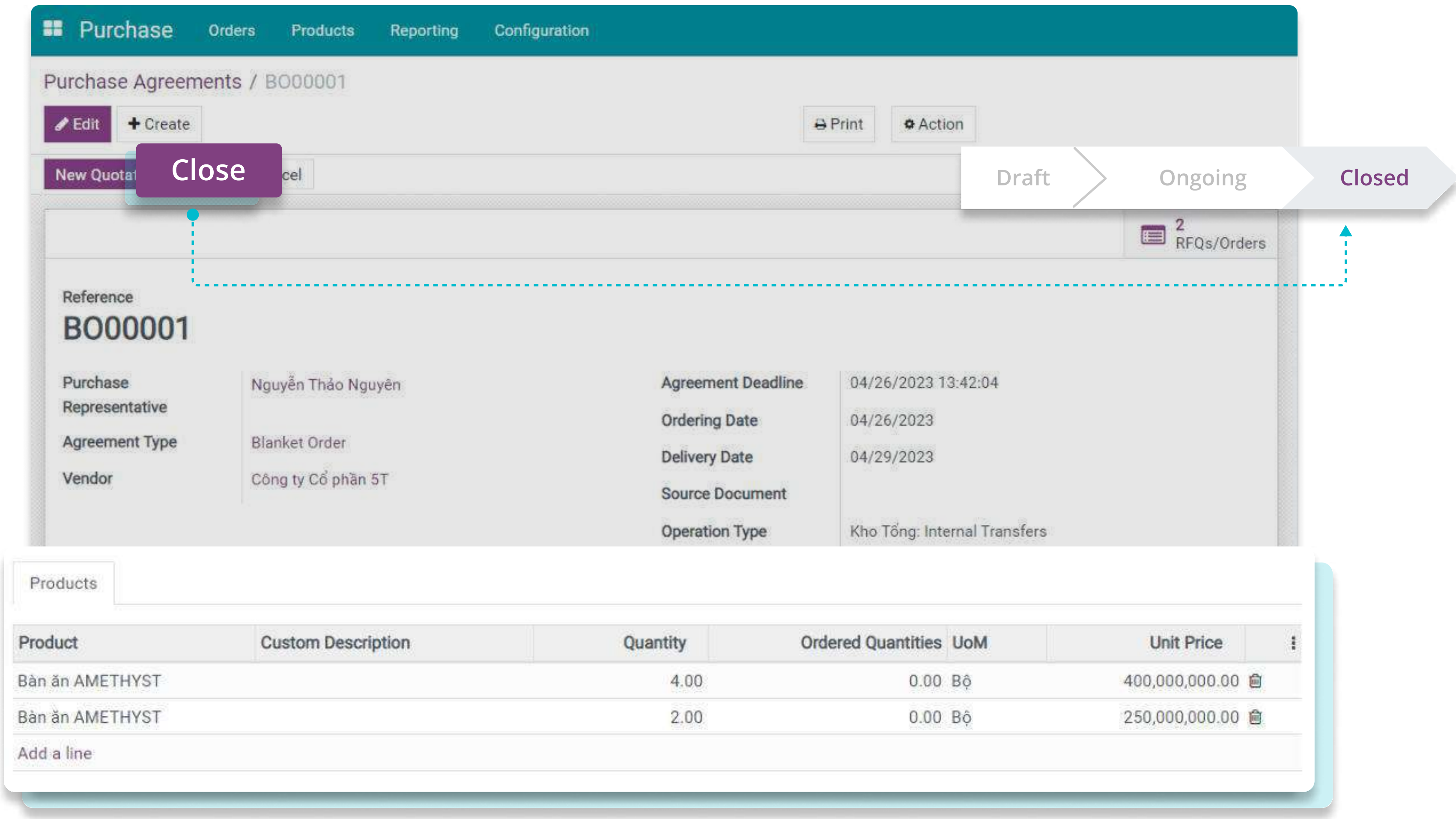
From the blanket order, you can create multiple Requests for Quotations (RFQs) at different times and quantities. You click **New Quotation** to create a new Request for quotation (Page 54).

Product information is automatically obtained from the blanket order, you can adjust the number of products in the detail lines of each RFQ. Then contact the vendor (Page 56) to confirm this RFQ.

You can see all requests for quotations or purchase orders attached to this purchase agreement.



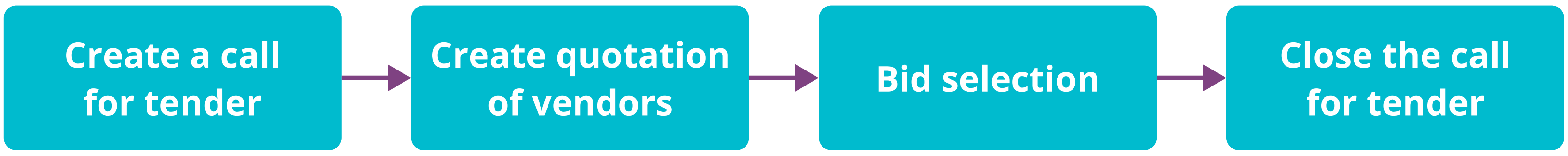
When the validity period has expired and the vendor has delivered the full amount of the blanket order, you press **Close** to complete.



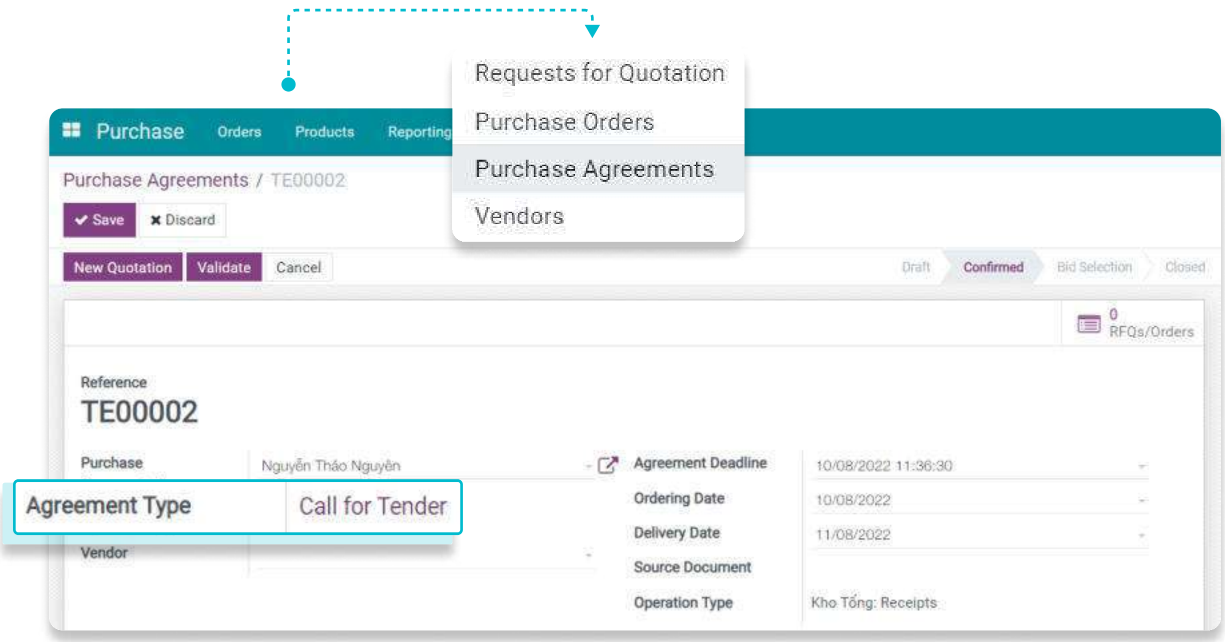
Create a call for tender

When businesses want to compare prices from many different vendors to choose the vendor with the best price, they can use the Call for Tender feature.

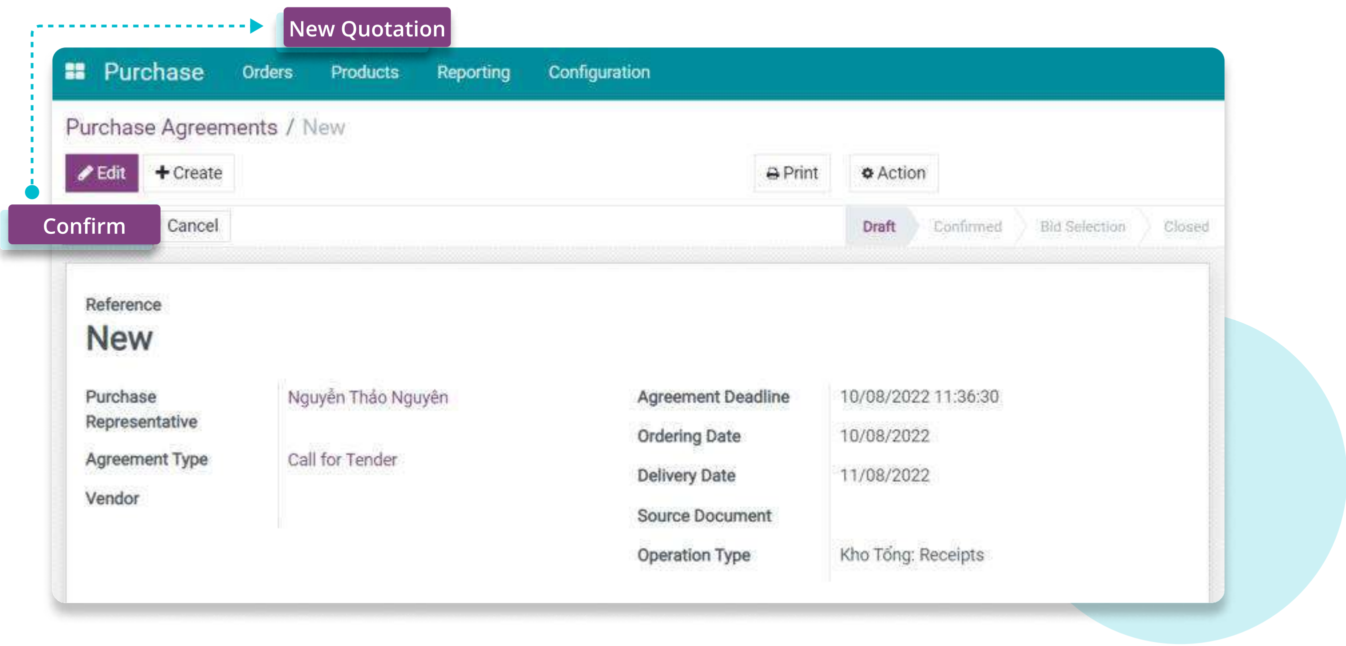
General call for tender process:



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

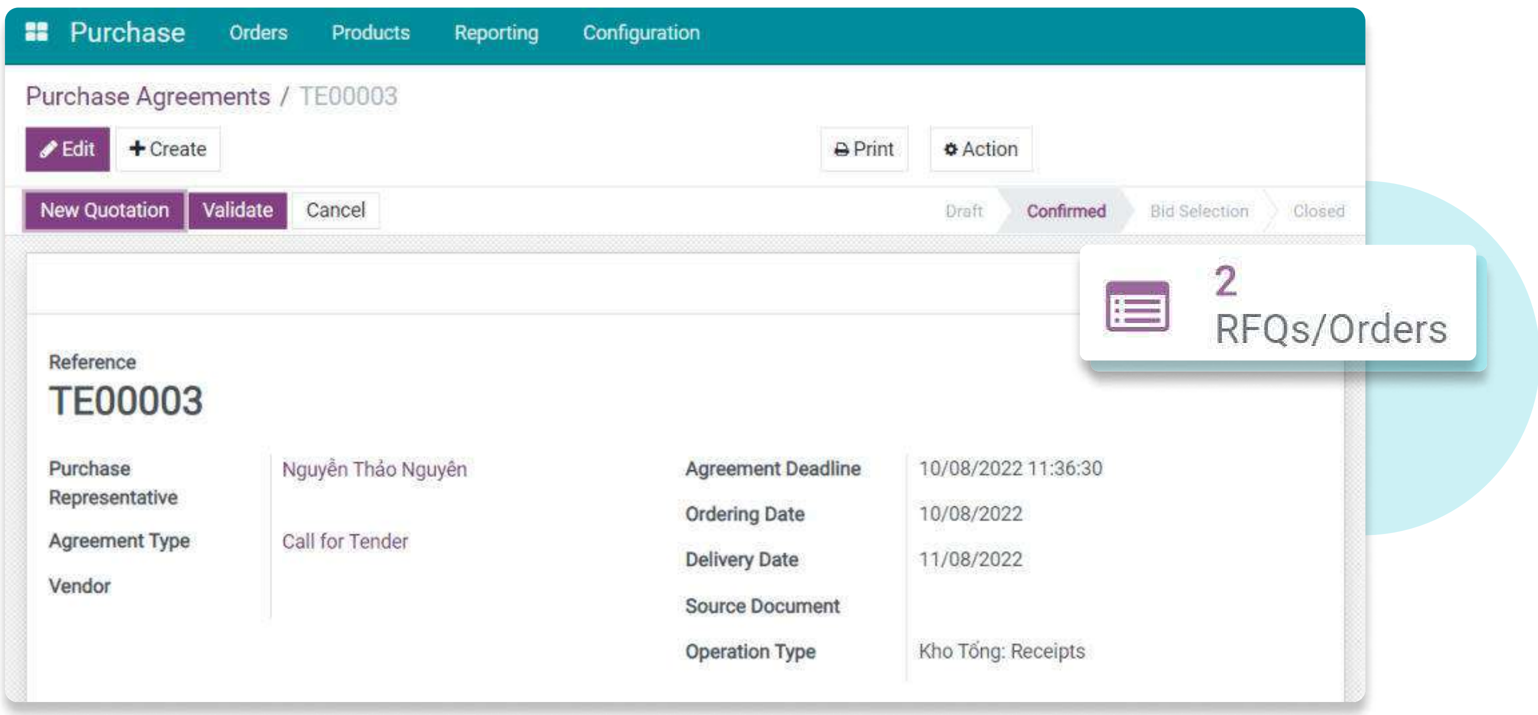


When the information for the purchase agreements is filled in, press **Confirm**.

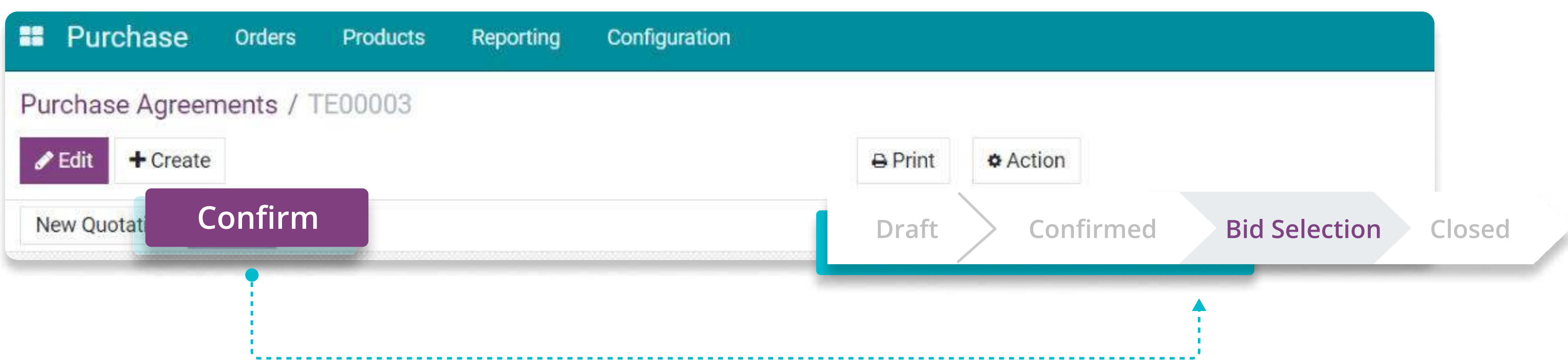


Create requests for quotations and send them to different vendors by pressing **New Quotation**.

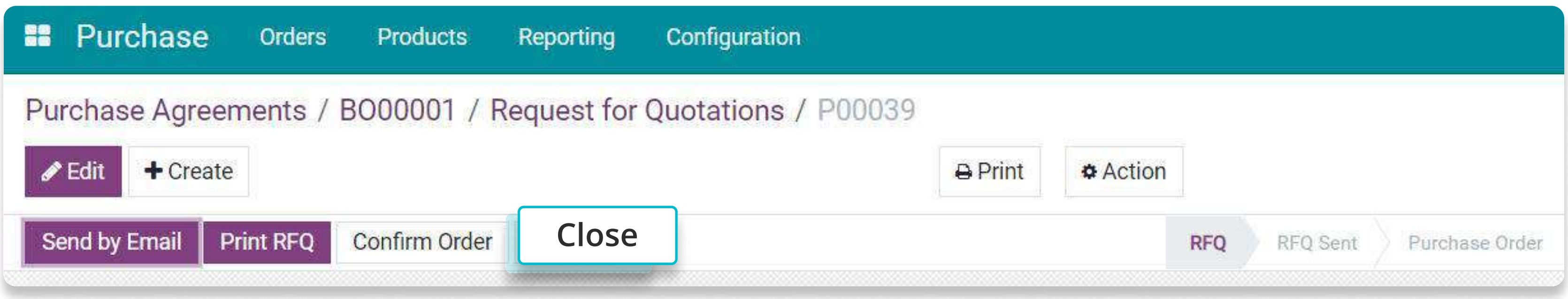
The product information on the purchase agreements will be automatically filled in the request for quotation. You only need to add the corresponding tender vendor information. All the related requests for quotations and/or purchase orders are attached to this call for tender.



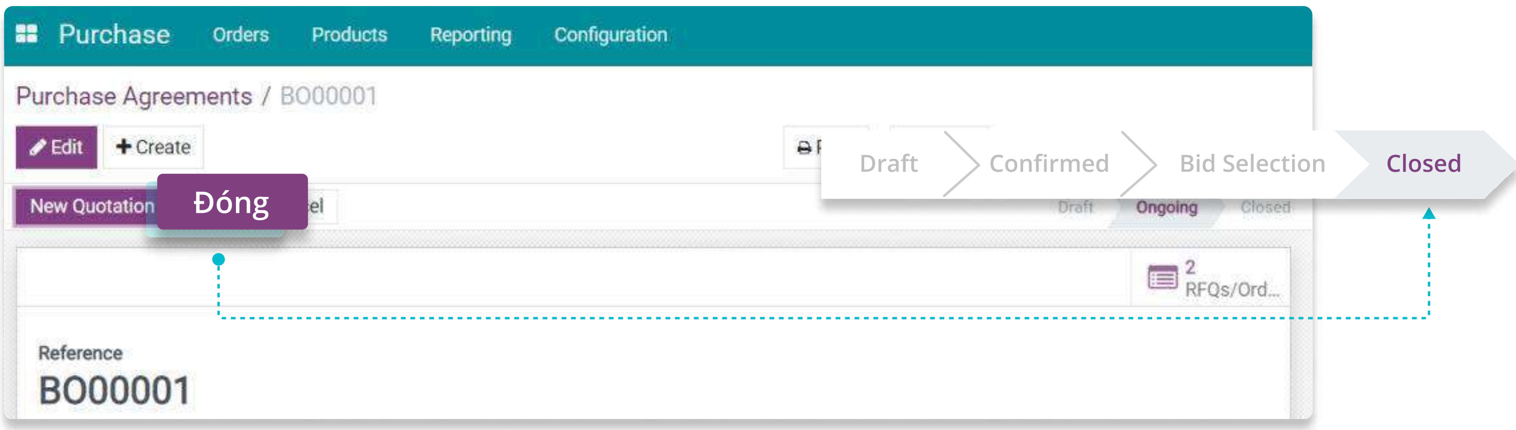
After selecting the appropriate vendors, press **Validate** to move to the **Bid Selection** stage.



Then cancel the other requests for quotations to close the tender call.



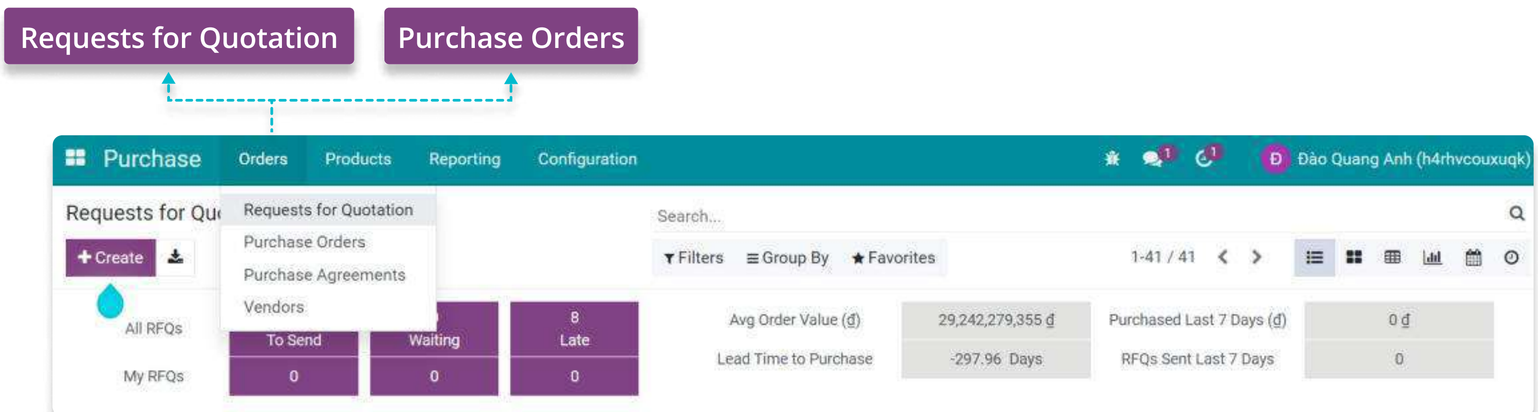
You press **Close** to end the bidding.



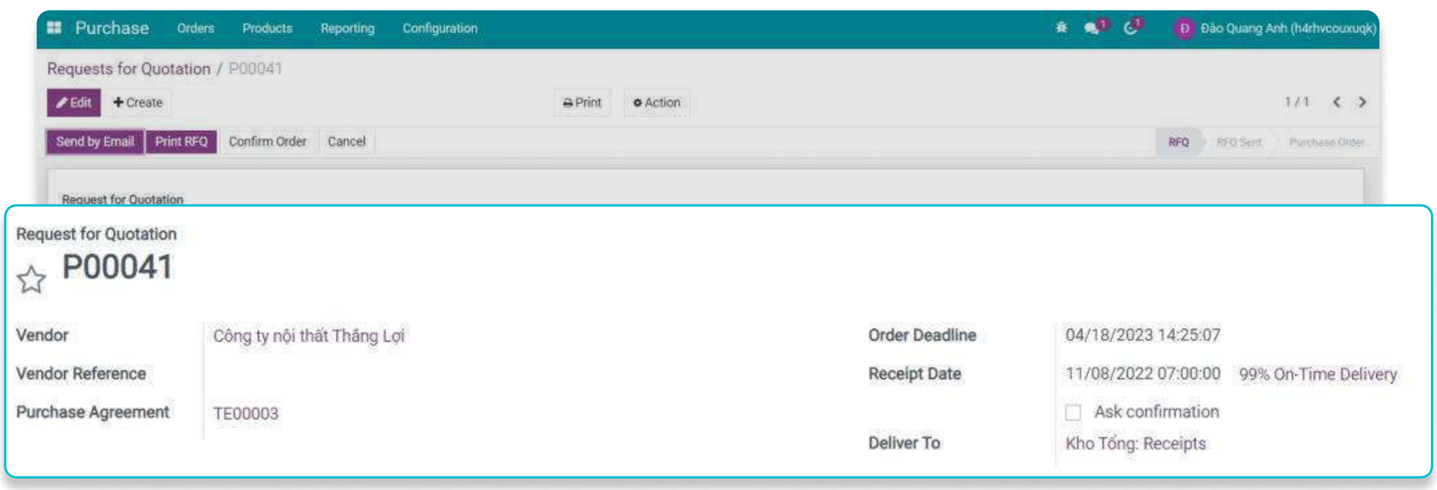
CREATE A PURCHASE ORDER

To create requests for quotations to 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:



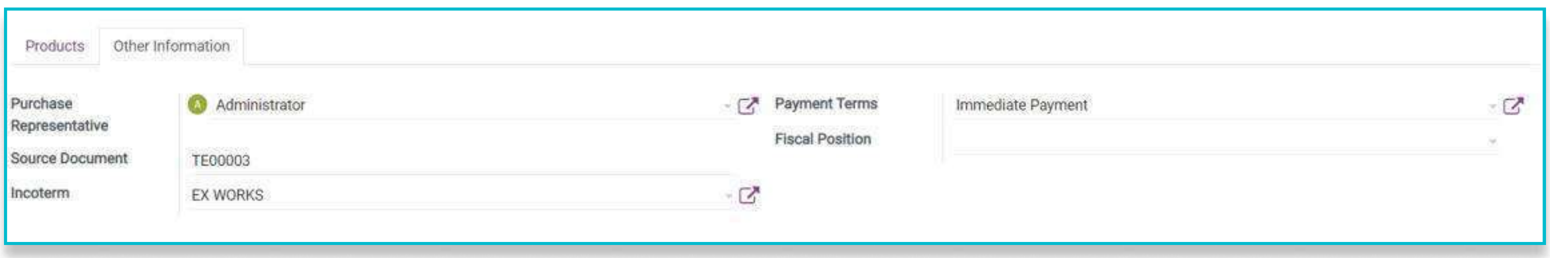
- *Vendor:* Select a vendor from an existing list or you can create a new one.
- *Order Deadline:* The day you close the request and stop receiving the vendor's quotation.
- *Receipt Date:* The delivery date promised by the vendor. This date is used to determine the estimated arrival time.

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.

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

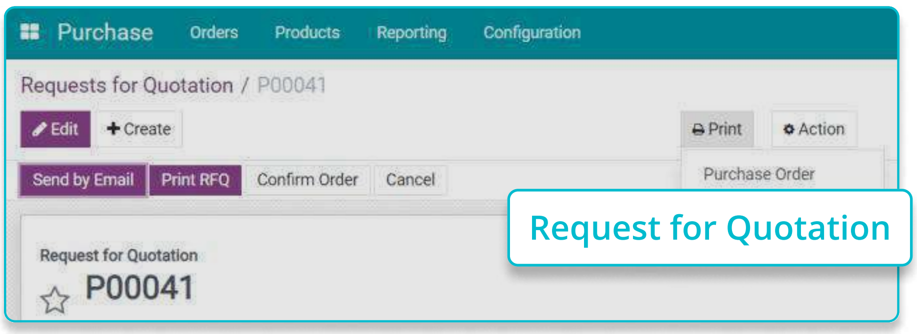


- *Purchase Representative:* The user who created this request for quotation will be displayed by default but you can select another person in charge.
- *Payment Terms:* Select the payment term that applies to the purchase order.

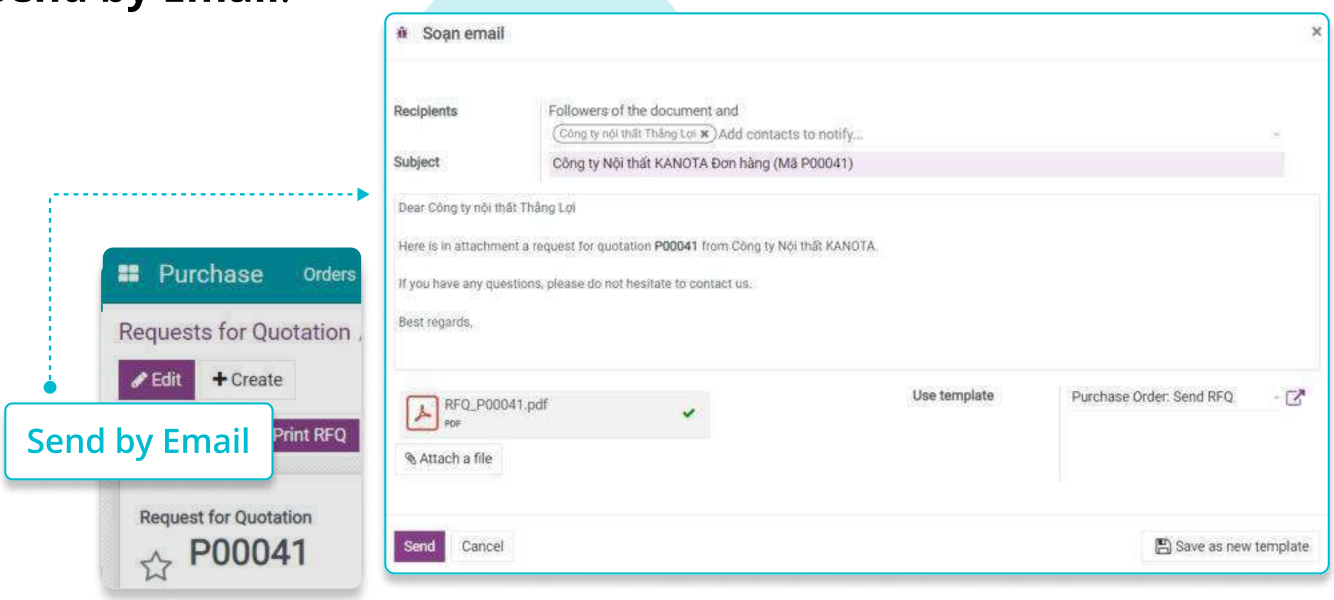
Press **Save** to save the information.

CONTACT VENDOR

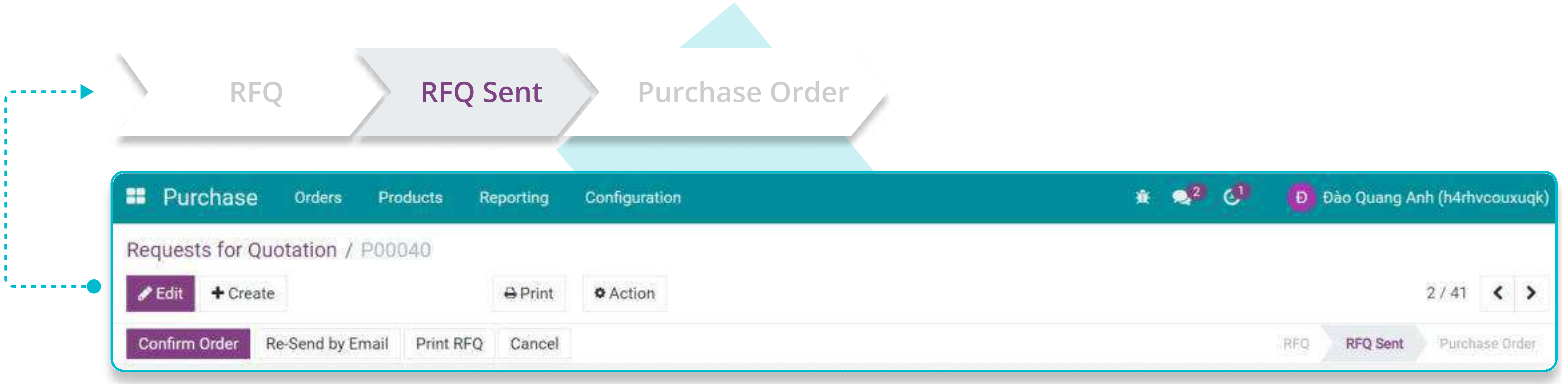
Press **Print ‣ Request for Quotation** to print out the request for quotation in PDF format and send it to the vendor.



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

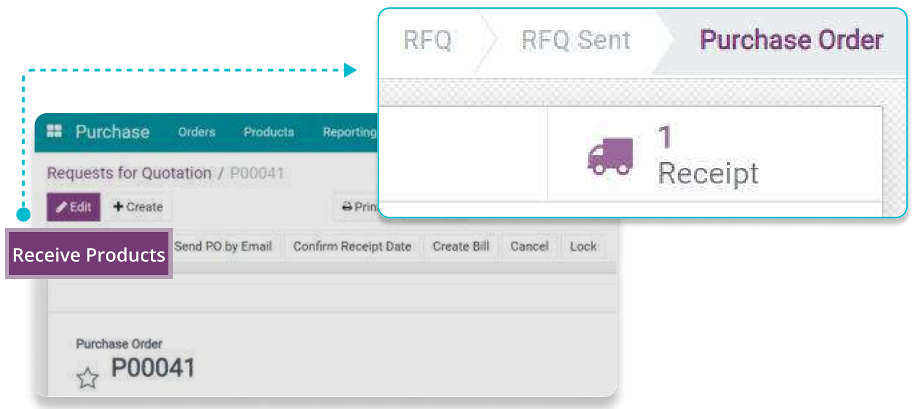


The request for quotation in PDF format will be automatically attached to the email, edit the email content if necessary and press **Send**. Once done, the **Request for Quotation** status will be changed to *RFQ Sent*.



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

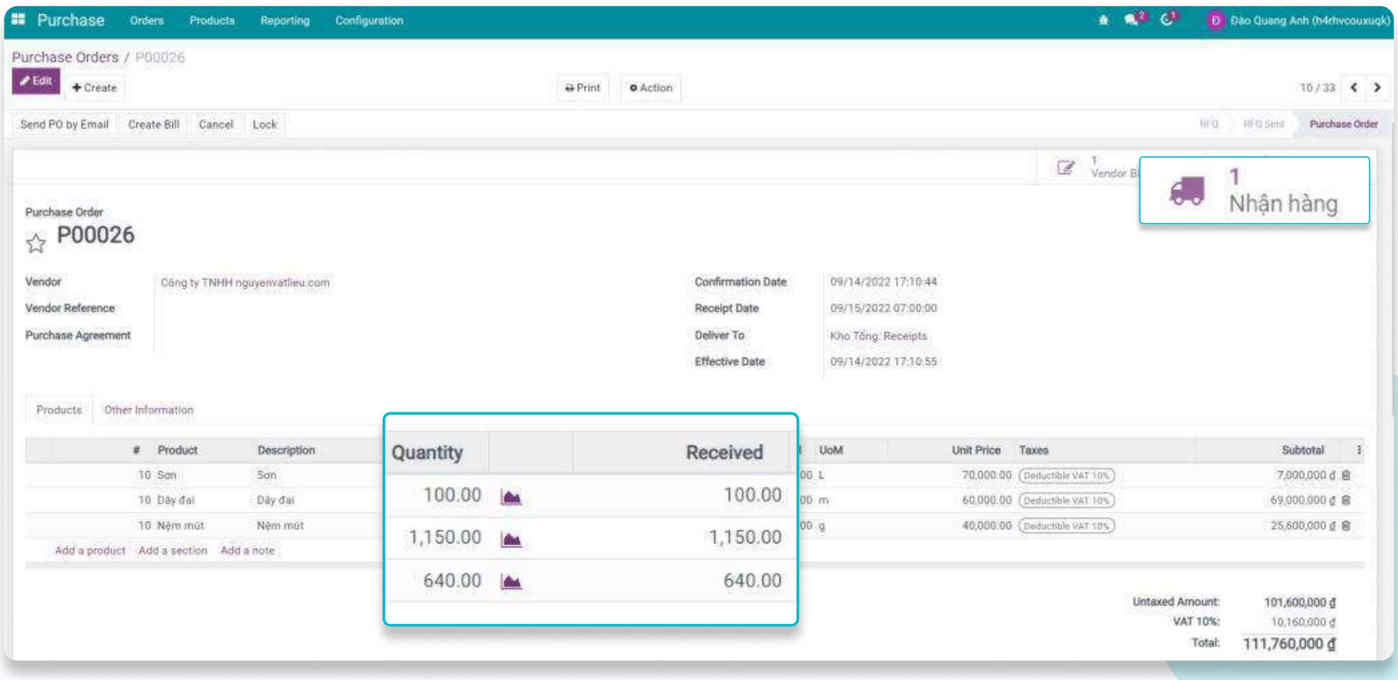
➡ **See details at:**

- *Register Payments (Page 93).*

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:

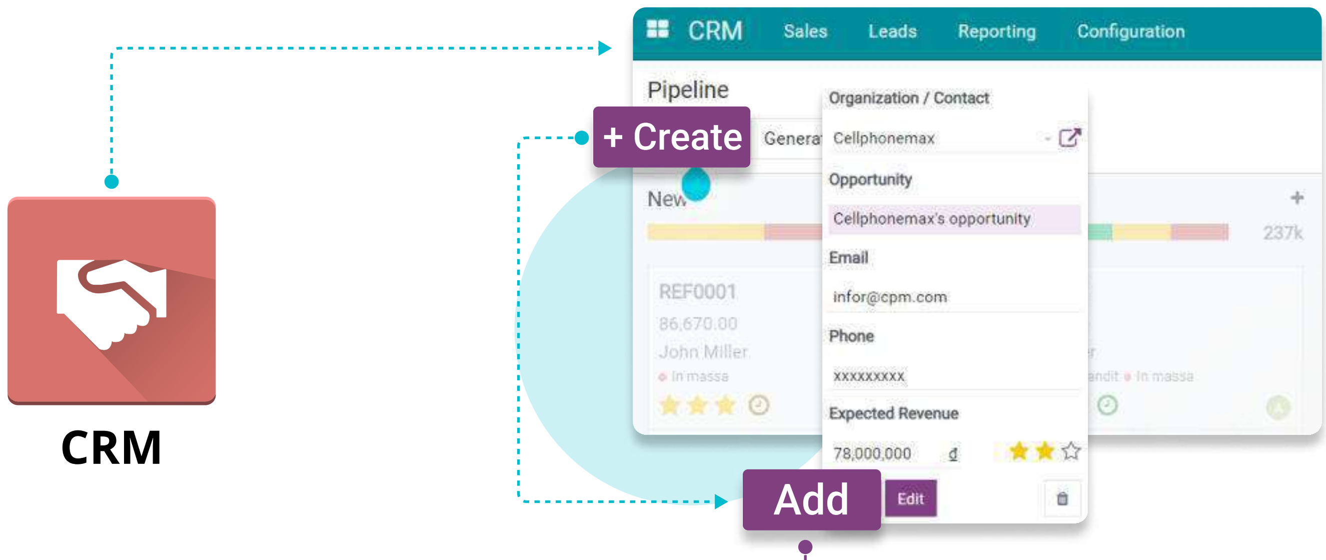


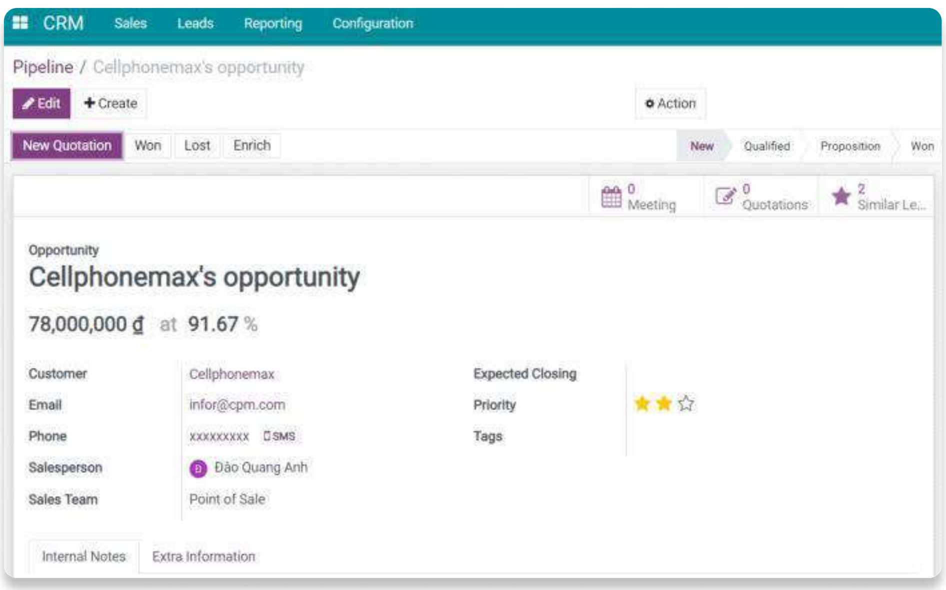
RECORDING SALES OPPORTUNITIES

Viindoo supports auto-generating opportunities to help you reduce the manual input data as well as accelerate the customer care process, making it efficient and effective. Opportunities can be automatically generated from the following sources:

- *Incoming email sent from your customer.*
- *Website contact page.*
- *LiveChat.*

To record an opportunity directly on the software, navigate to **CRM ‣ Leads** and press the **Create** button.





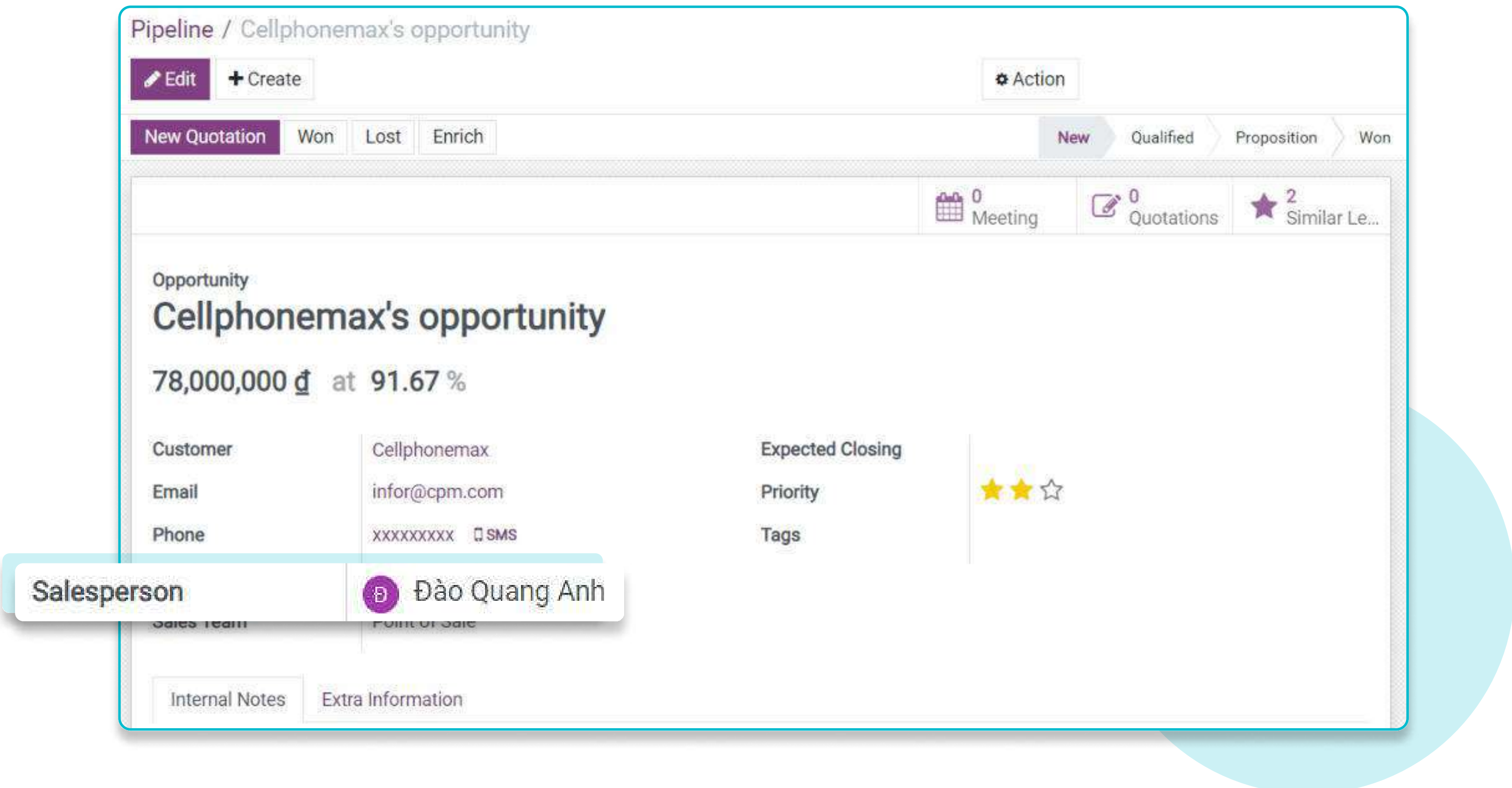
From here, enter the basic information about the opportunity and then click the **Add** button to save it or click **Edit** to go to the detailed information view.

➡ See details at:

- *Steps to record Leads.*

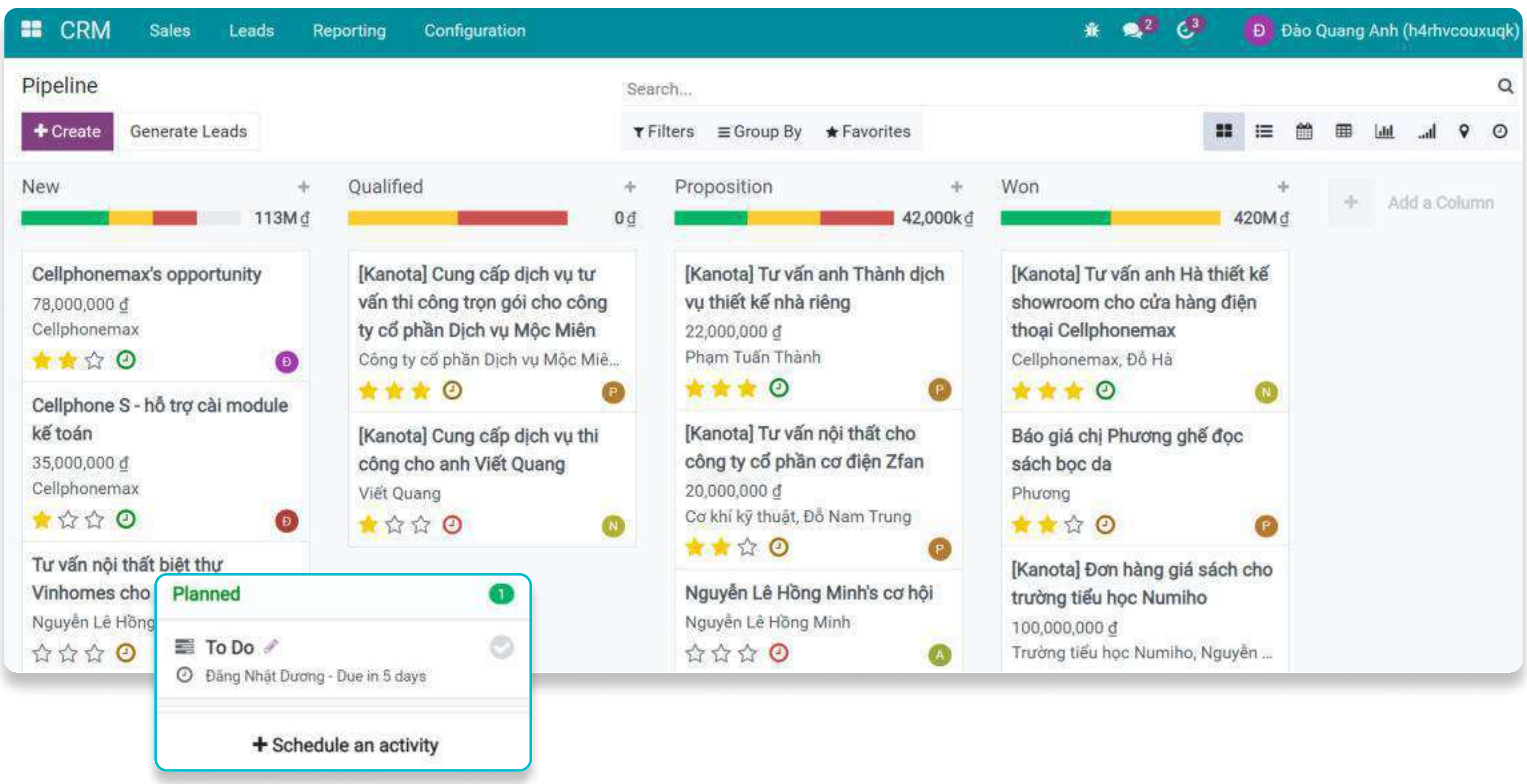
PLANNING FOR CUSTOMER CARE ACTIVITIES

You can assign an employee to the **Salesperson** field to take care of each sales opportunity.



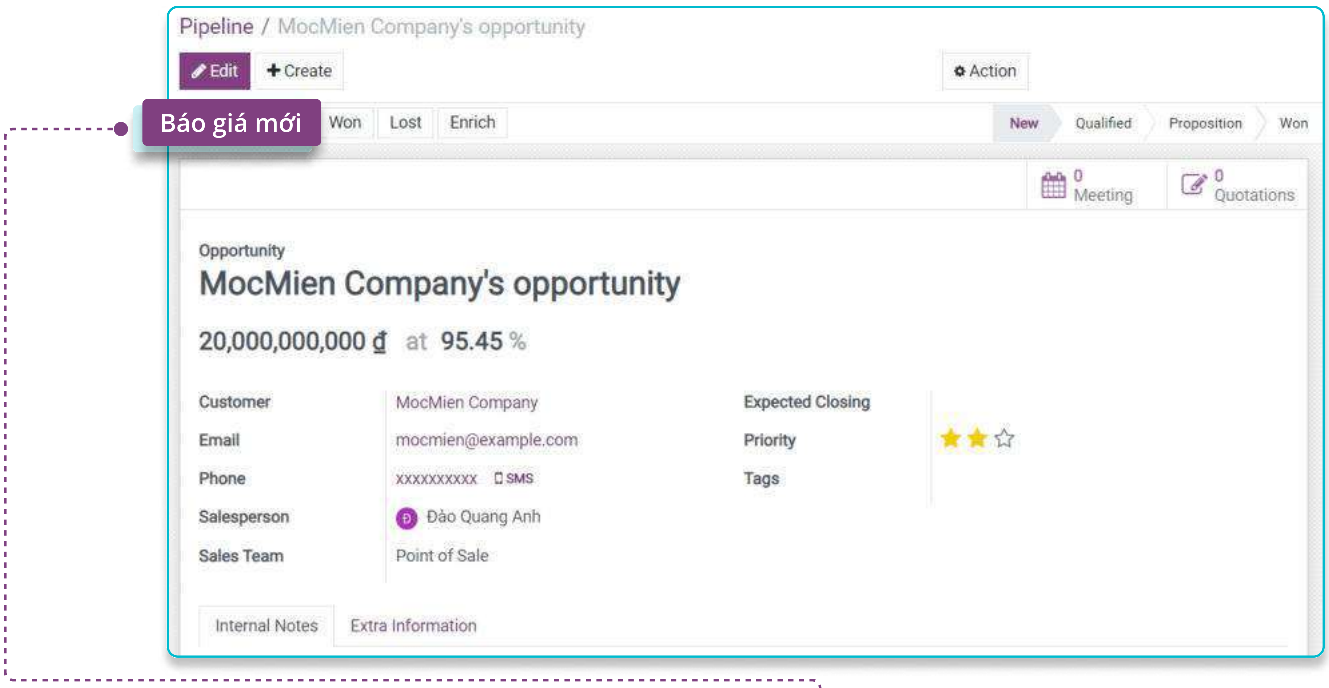
Besides, to convert an opportunity into a sales order, you can have a specific customer care plan using the schedule activity feature. Or click the clock icon on the Kanban view of an opportunity to assign a customer care activity. The color of the clock icon will show you the status of each scheduled activity.

- *Green:* Future activities.
- *Yellow:* Today's activities.
- *Red:* Overdue activities.

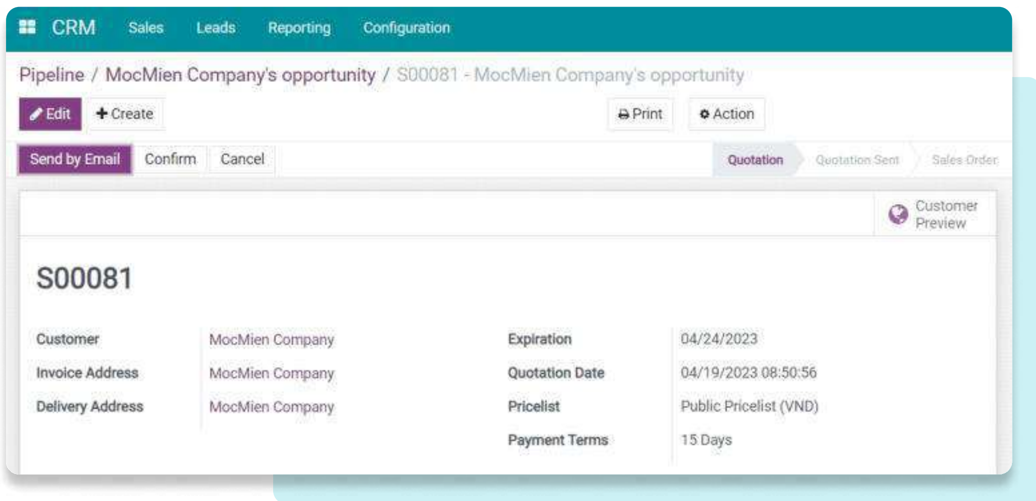


CREATE AND SEND A QUOTATION TO CUSTOMER

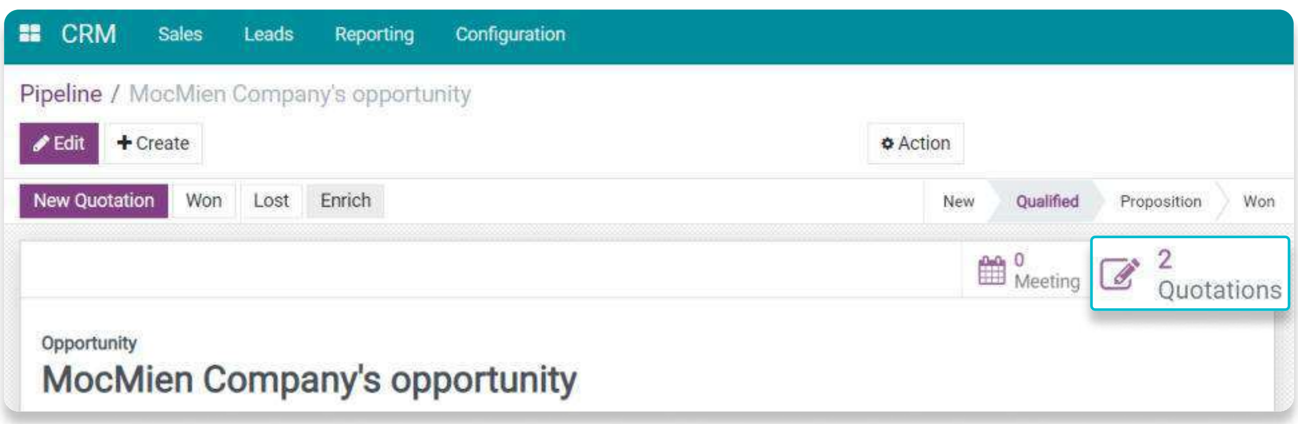
While taking care of the sales opportunity, customers may ask you to send a quotation for reference before making the final purchase decision. To create a quotation from an opportunity, navigate to **CRM ‣ Sales ‣ My Pipeline**, select the opportunity that is being taken care of, and select **New Quotation**.



You will be redirected to the quotation creation interface in the CRM app, add the necessary information and save it. From here, you can send the quotation to your customer and start the sales process.



Once a quotation is generated, it is automatically linked to the original opportunity. You can click on the **Quotations** button on the opportunity view to see the list of created quotations.



BASIC SALES OPERATIONS

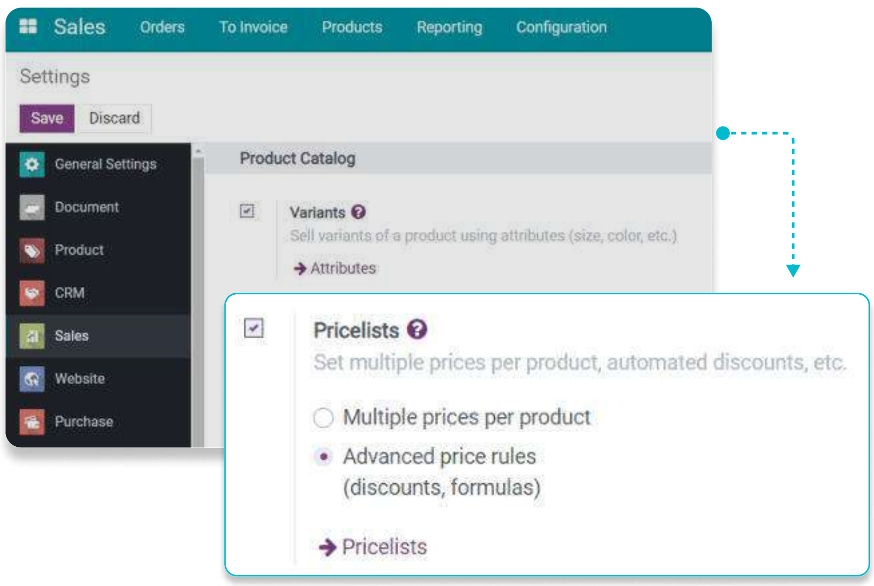
Create Pricelist → Quoting and closing orders → Record payment → Track the delivery and issue invoice

➡ *Check out Viindoo's suggestions for basic sales operations by job positions in Appendix: Basic sales operations - (Page 138).*

Create Pricelists for customers

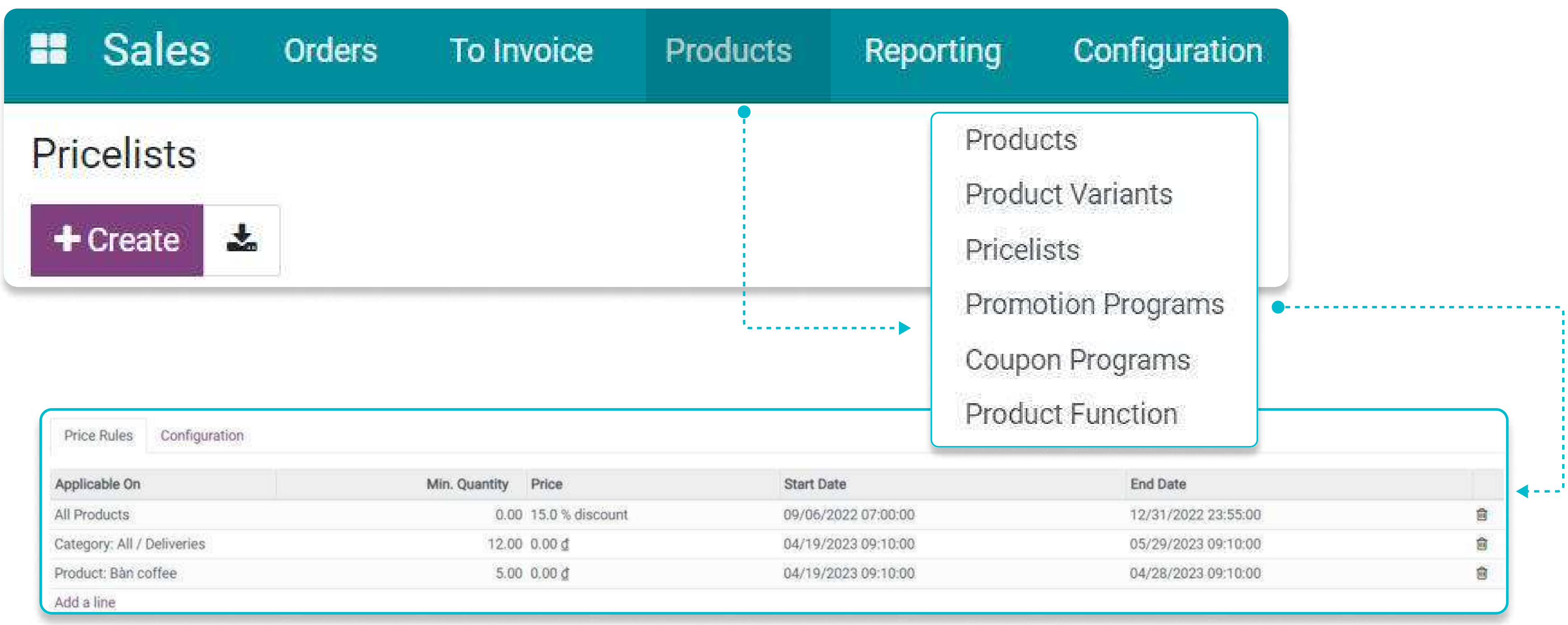
Activate the Pricelists feature

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.

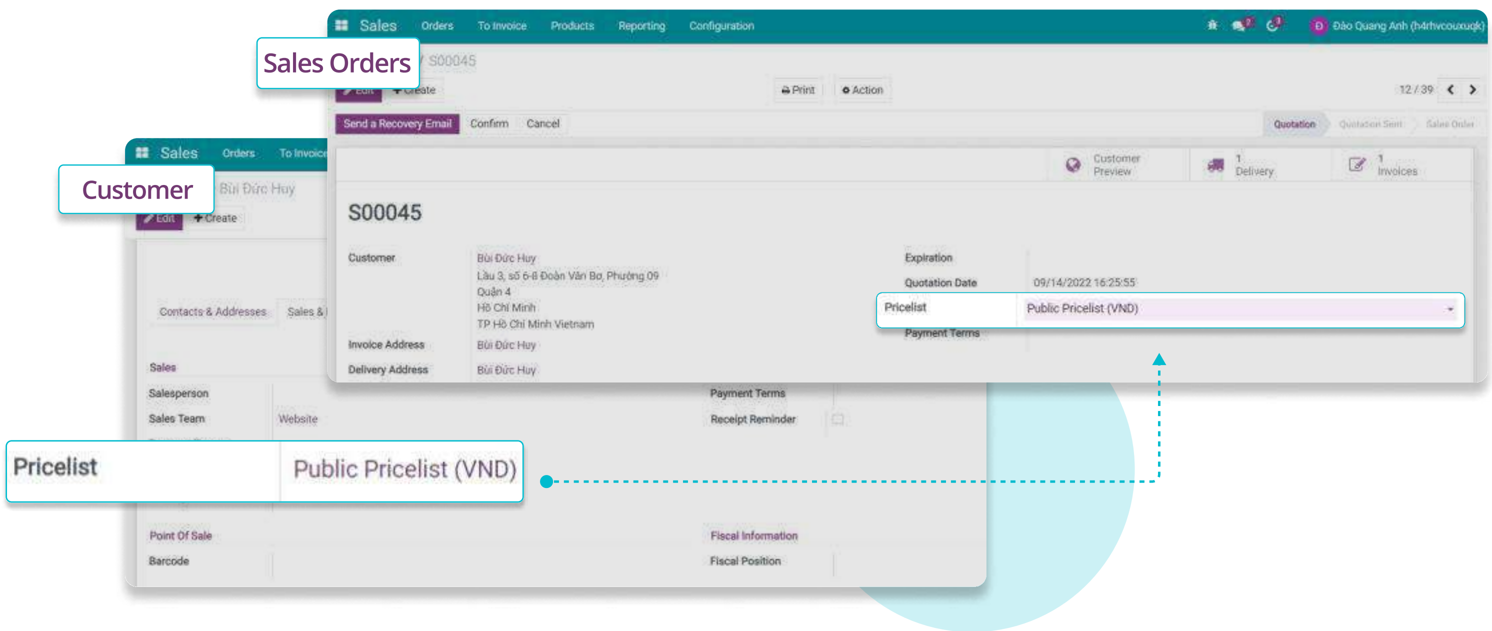


On the **Price Rules** tab, press **Add a line** and add the following information:

- *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 price list you've just created.



With the above configuration, this price list 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, and then follow the instructions of the system, the product prices will be updated according to the selected pricelist.

Besides, Viindoo provides tools to set up price lists with more complicated rules and formulas

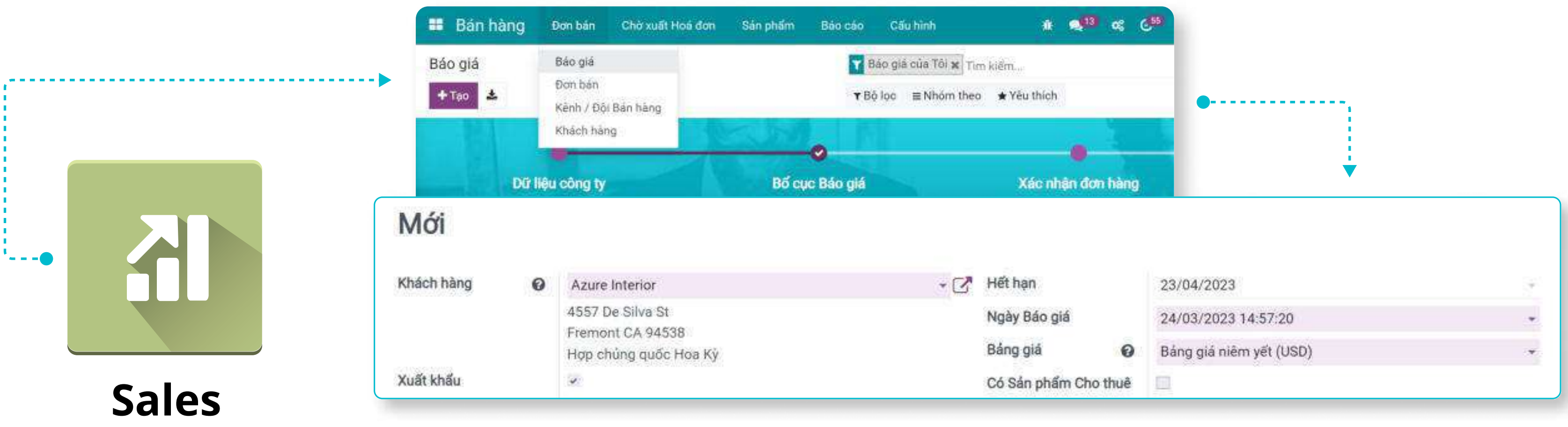
➡ **See details at:**

- *Guide to set up price lists 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 ₫
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 ₫
Bộ bàn ăn Rosa (kèm hốc để rượu)	Bộ bàn ăn Rosa (kèm hốc để rượu)	2.00	Bộ	30,000,000.00	Value Added Tax (VAT) 10%	0.00	60,000,000 ₫
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 ₫
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 ₫
[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 ₫

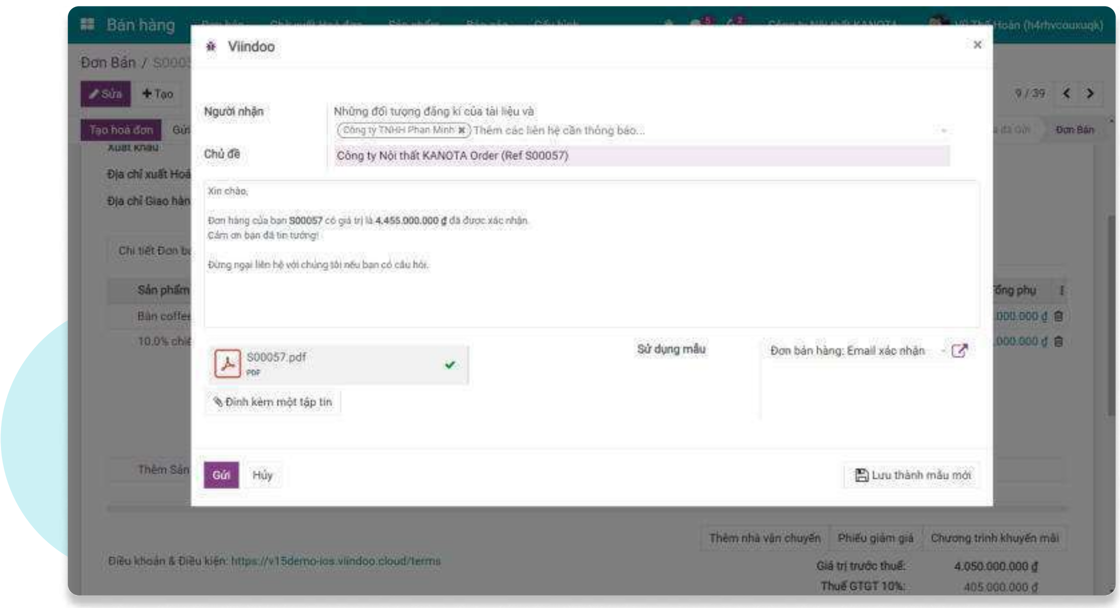
Add a product | Add a section | Add a note

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 of this order.

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

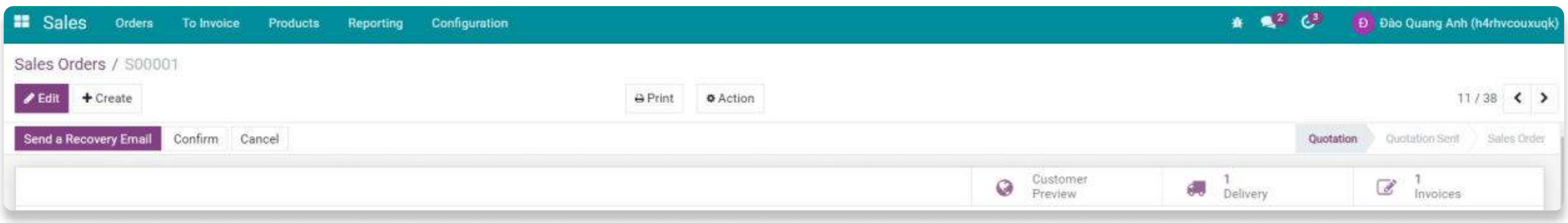
Confirming a sales order

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.



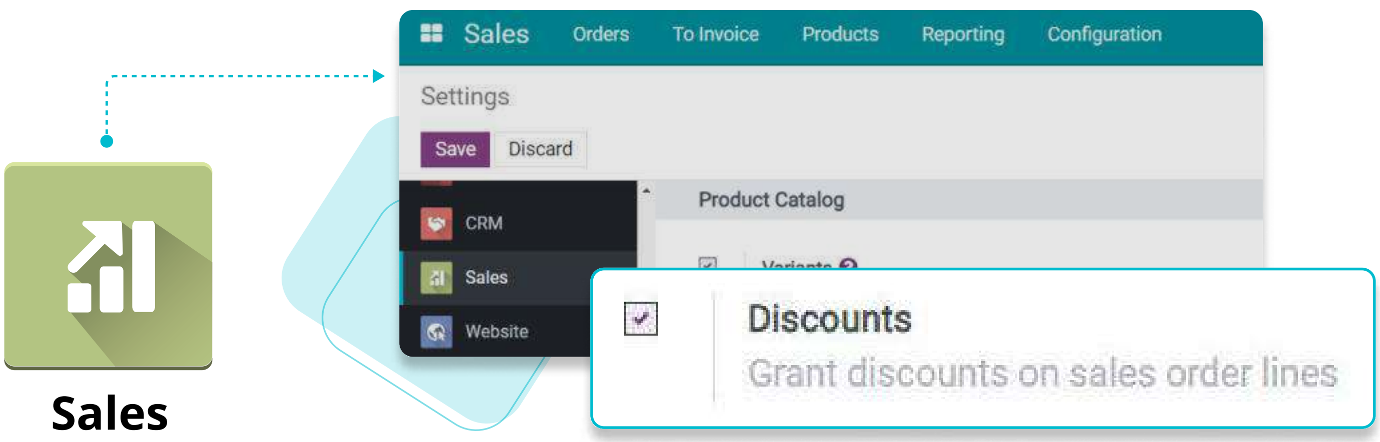
After receiving the customer feedback, you might encounter one of the following situations:

- *The customer doesn't agree with your quotation:*
  - Press **Edit** to adjust the quotation according to the agreement with your customer.
  - 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**.



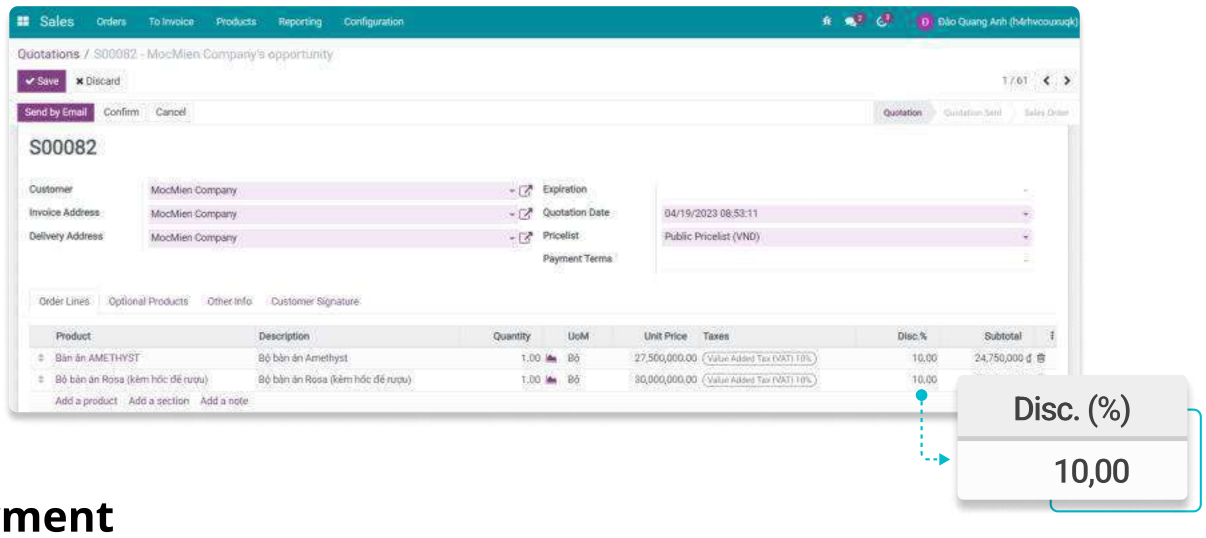
Applying discounts to a sales order

In many situations, a business might want to give discounts to their customers, and you can easily do that with Viindoo 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

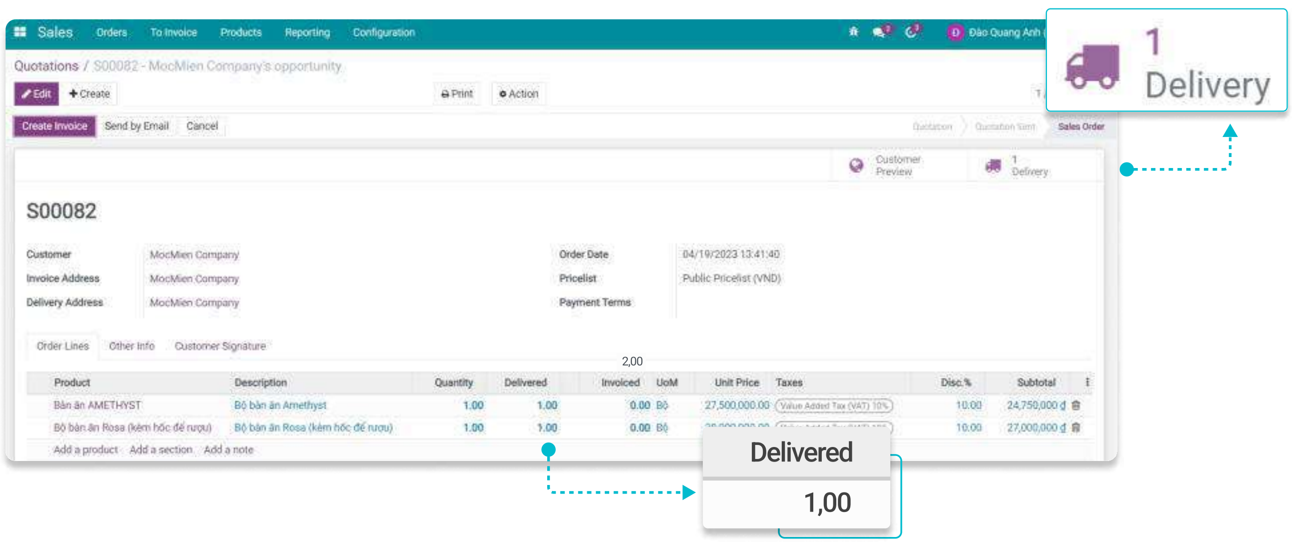
➡ See details at:

- *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 in the **Delivered** column:

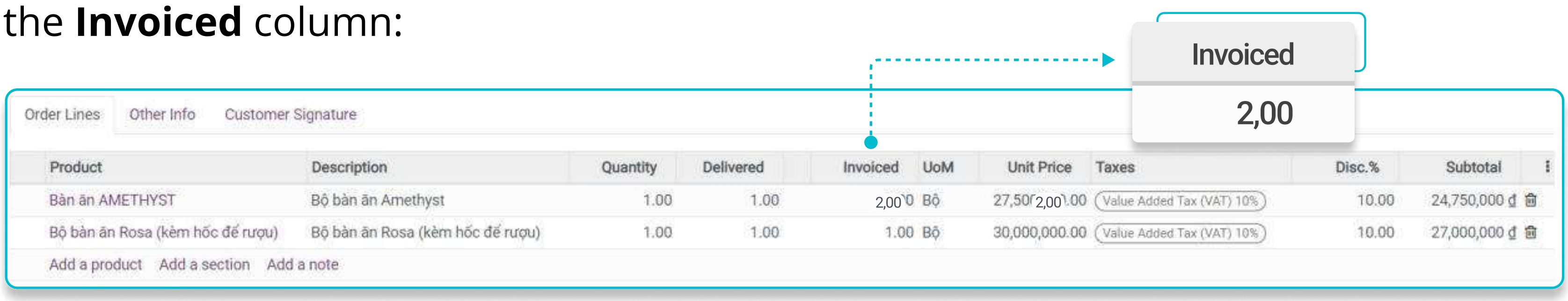


Or you can click on the **Delivery** button to see the delivery status, this helps you to be proactive in tracking orders and supporting your customers.

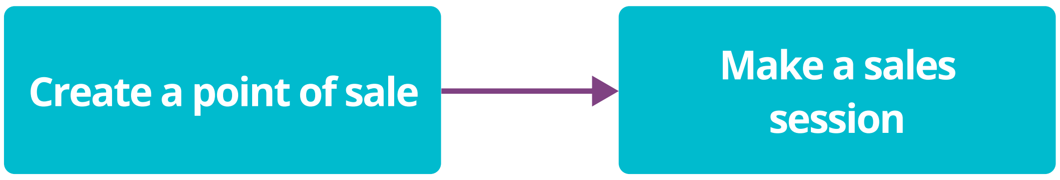
In order to see the delivery orders, your employees must have access rights to the **Inventory** app.

Tracking invoicing status

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



RETAIL OPERATIONS AT POINT OF SALE

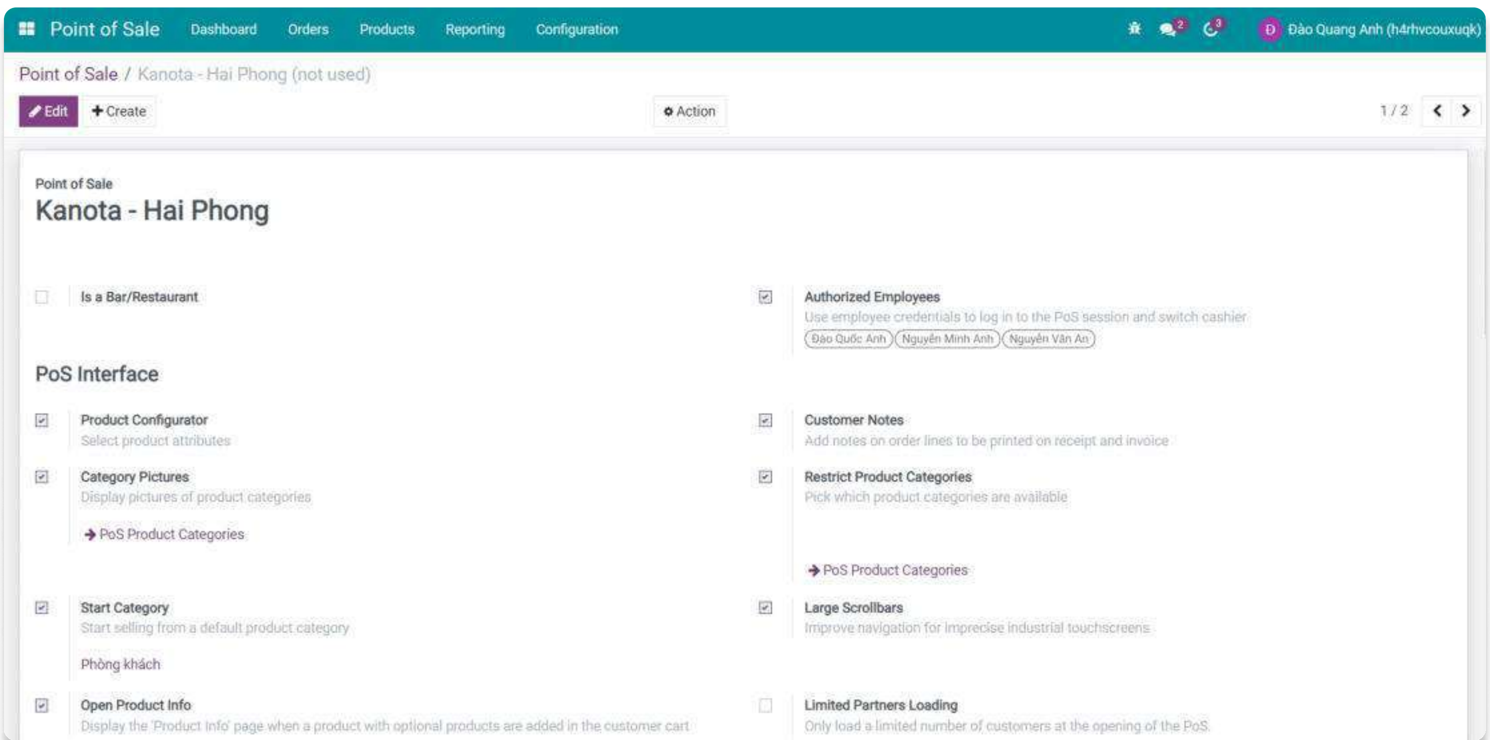


The *Point Of Sales (POS)* app is used at the checkout counters of points of sale such as grocery stores, food retail chains, restaurants, etc. With the Viindoo software, you can create and set up information on each point of sale, then simply start a sales session.

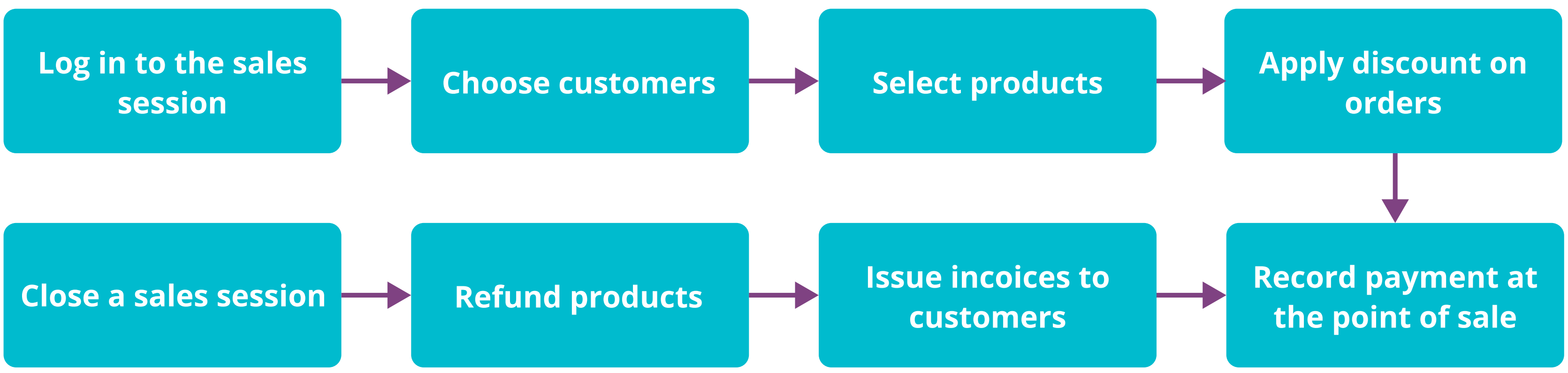
> ➡ *Check out Viindoo's suggestions for the retail operations at Point of Sale by job positions in Appendix: Retail operations at Point of Sale - (Page 138).*

Create a point of sale

Navigate to the **Point of Sale** ‣ **Configuration** ‣ **Point of Sale** ‣ **Create**, enter the name of the point of sale then configure the necessary features and information. You can create multiple points of sale corresponding to the stores or points of sale to be managed.



Create a sale sessions



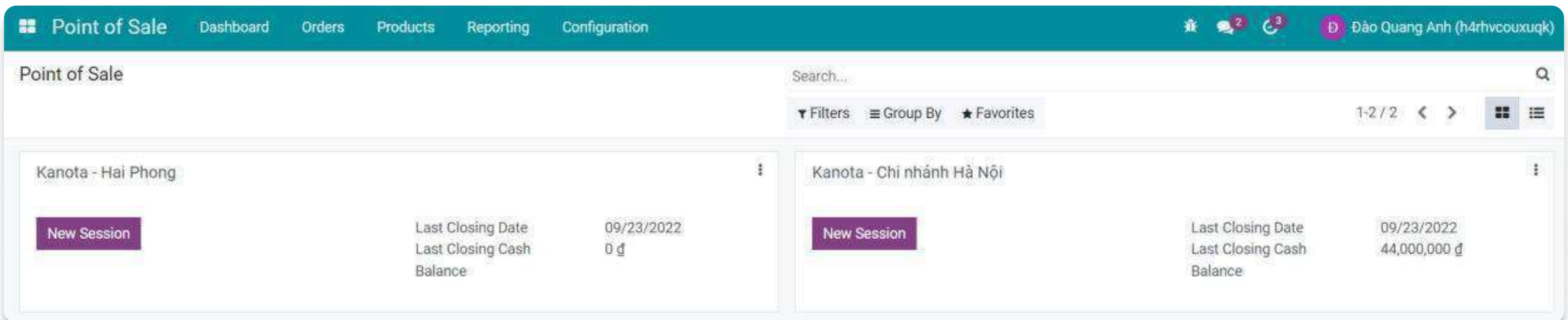
Log in to the sales session

A sales session can last for various shifts performed by different employees. To manage the login of cashiers at a point of sale.

➡ **See details at:**

- *Enable the employee login feature.*

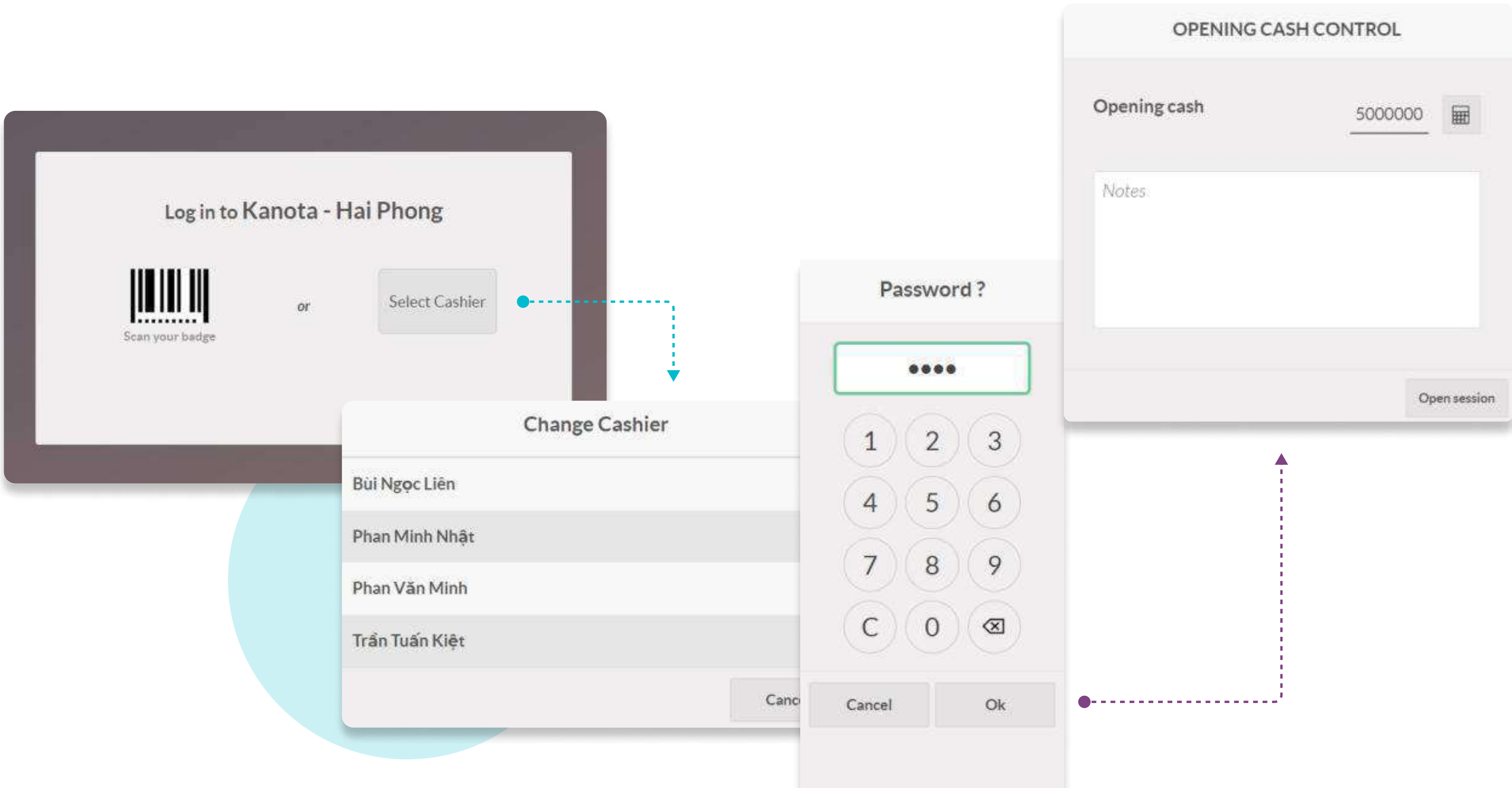
As a point of sale manager (with a user account logged into the system), you can navigate to the **Point of Sale** app, and press **Open Session** on the point of sale that you are working at to start a new session.



On the screen view of the point of sale, the cashiers can use their badge or personal PIN code to login by pressing **Select Cashier** and entering the PIN code.

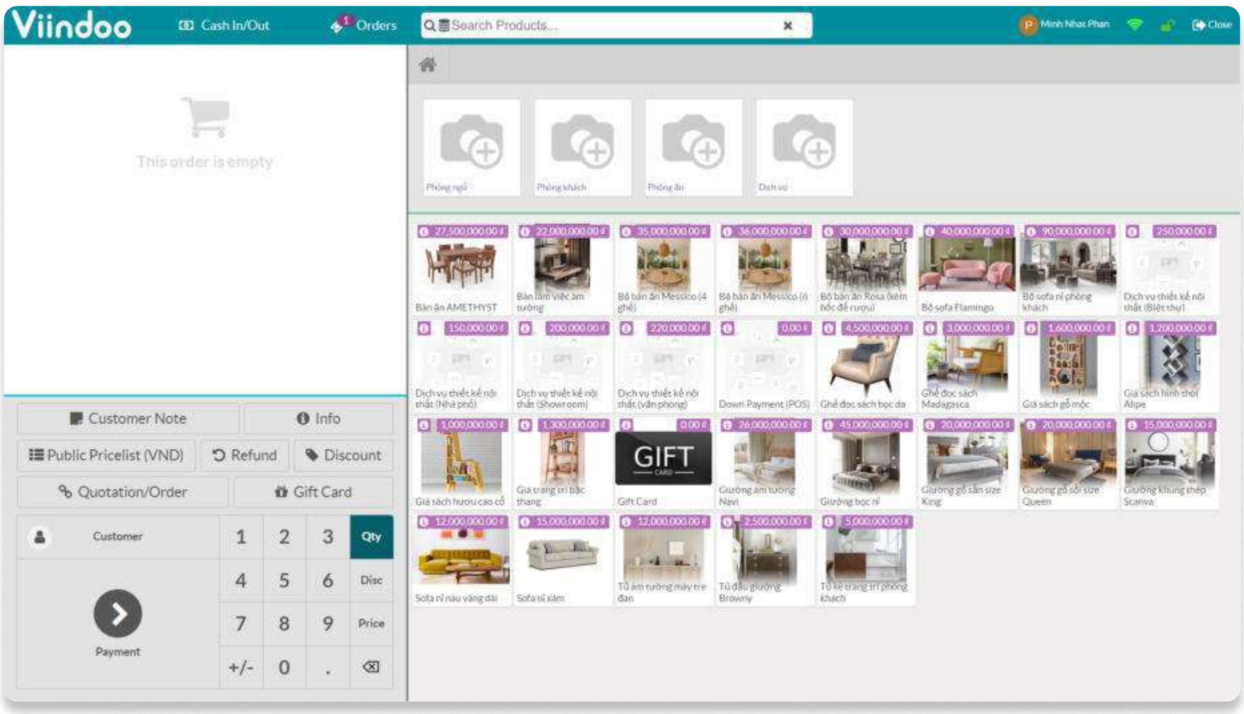
➡ **See details at:**

- *Create a PIN code.*
- *Create the Badge ID.*



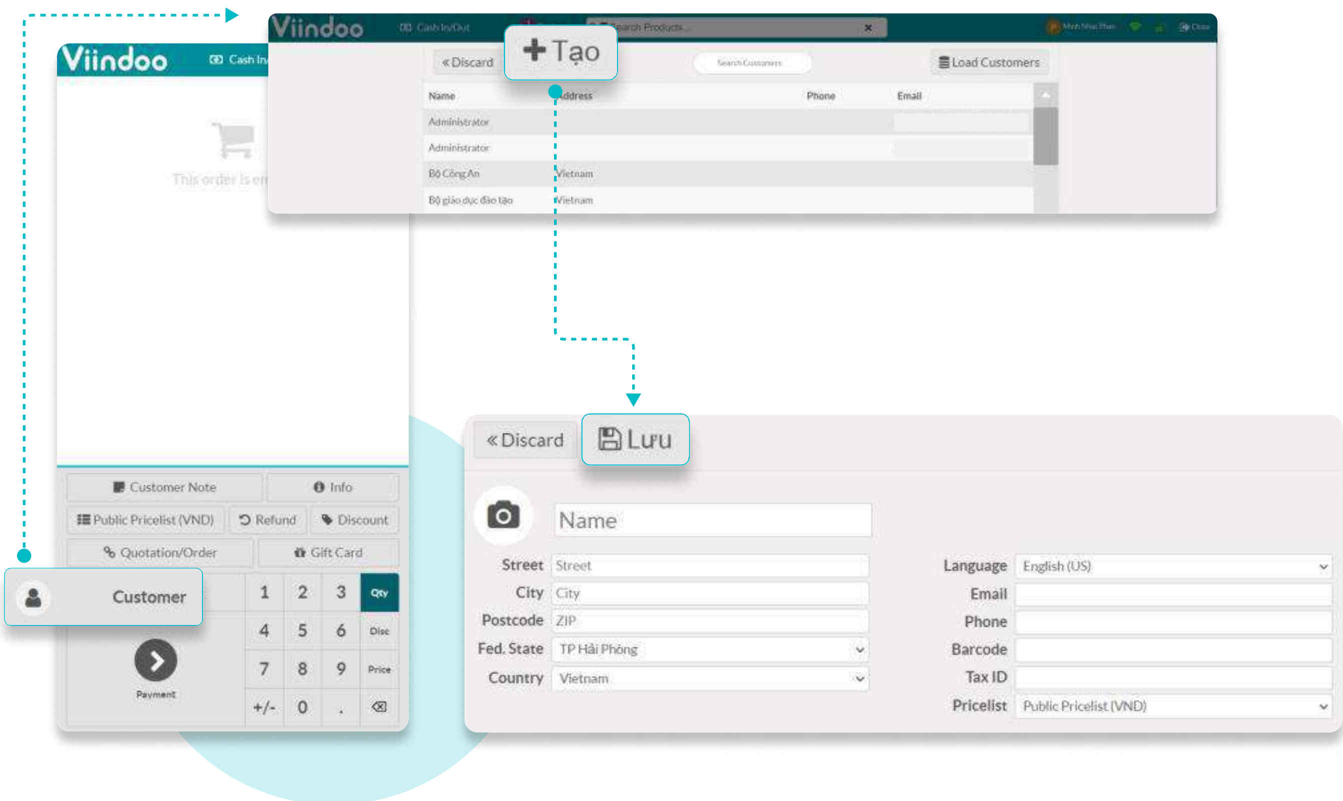
Enter the opening amount of cash then press **Open session**.

Next, you will be taken to the point of sale view to begin your sales session.



Select customers

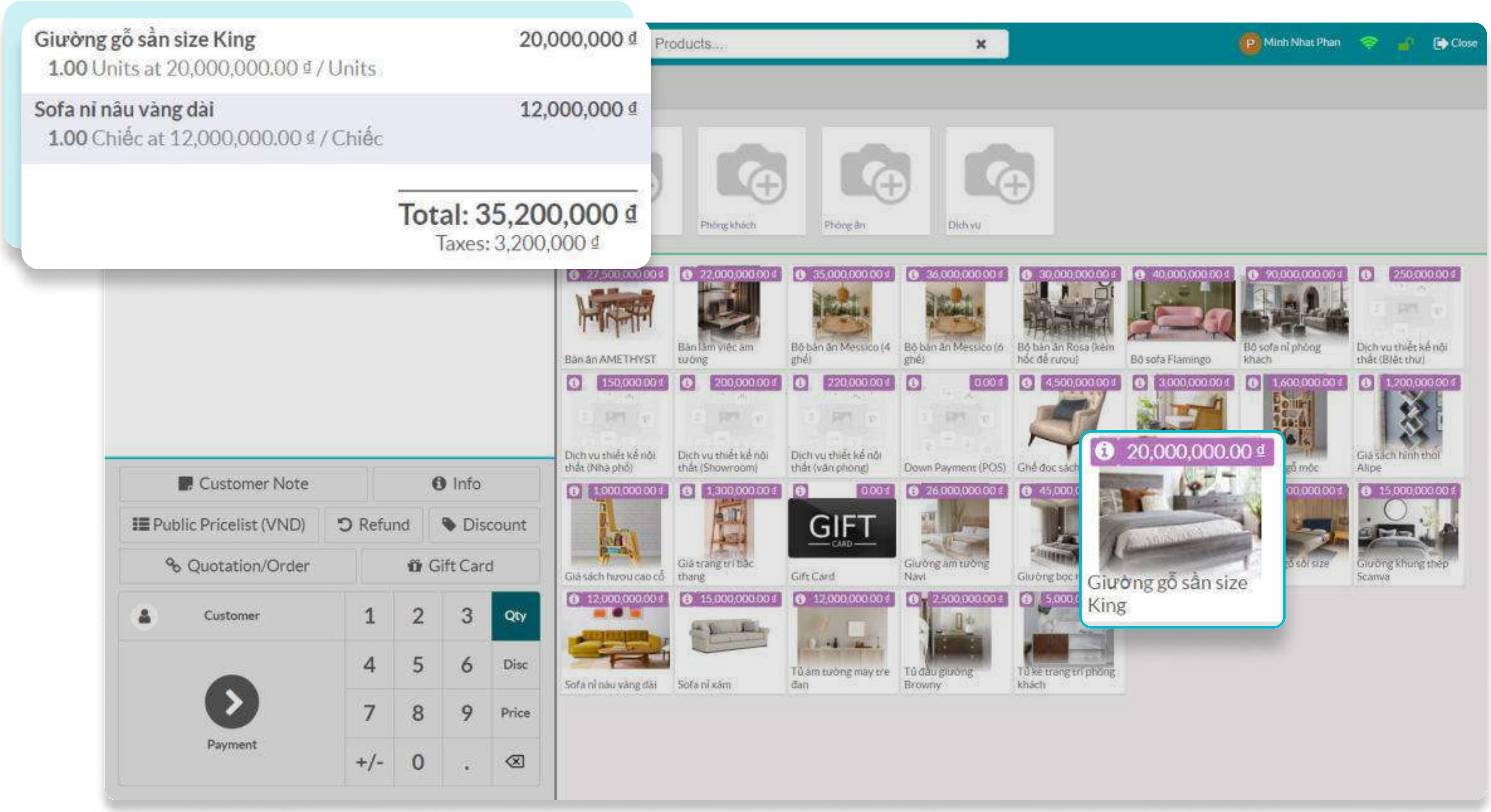
To enter the customer for the order, click the **Customer** button.



Next, you can use a name or phone number on the search bar to check if this contact is already existing in your system. In case this contact is already a customer, select the correct customer name and click **Set Customer**.

If this is a new customer, click **Create** and record the customer's information then click **Save**. The customer's information will be displayed on the main screen of the sales session, which helps you to follow this customer's purchase history and reduce invoicing time.

Select products



➡ **See details at:**

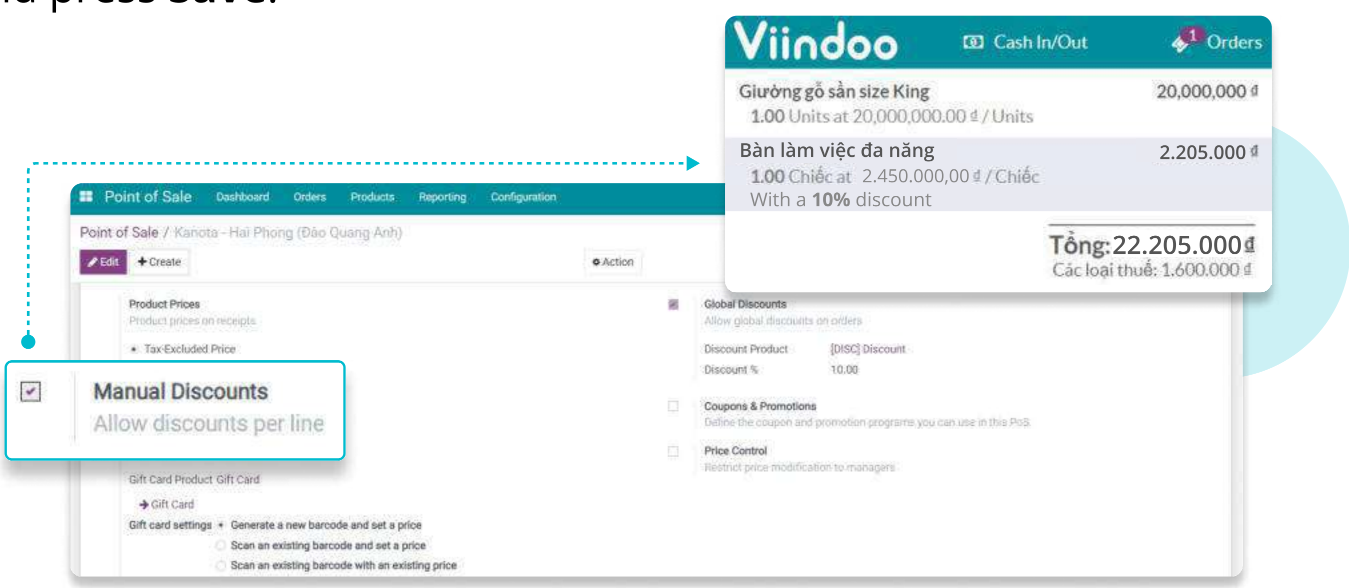
- *Product and Product categories in the Point of Sale.*

Apply discount on orders

If you are running promotion programs on special occasions or holidays, you can easily manage those as follows:

Discount on each product

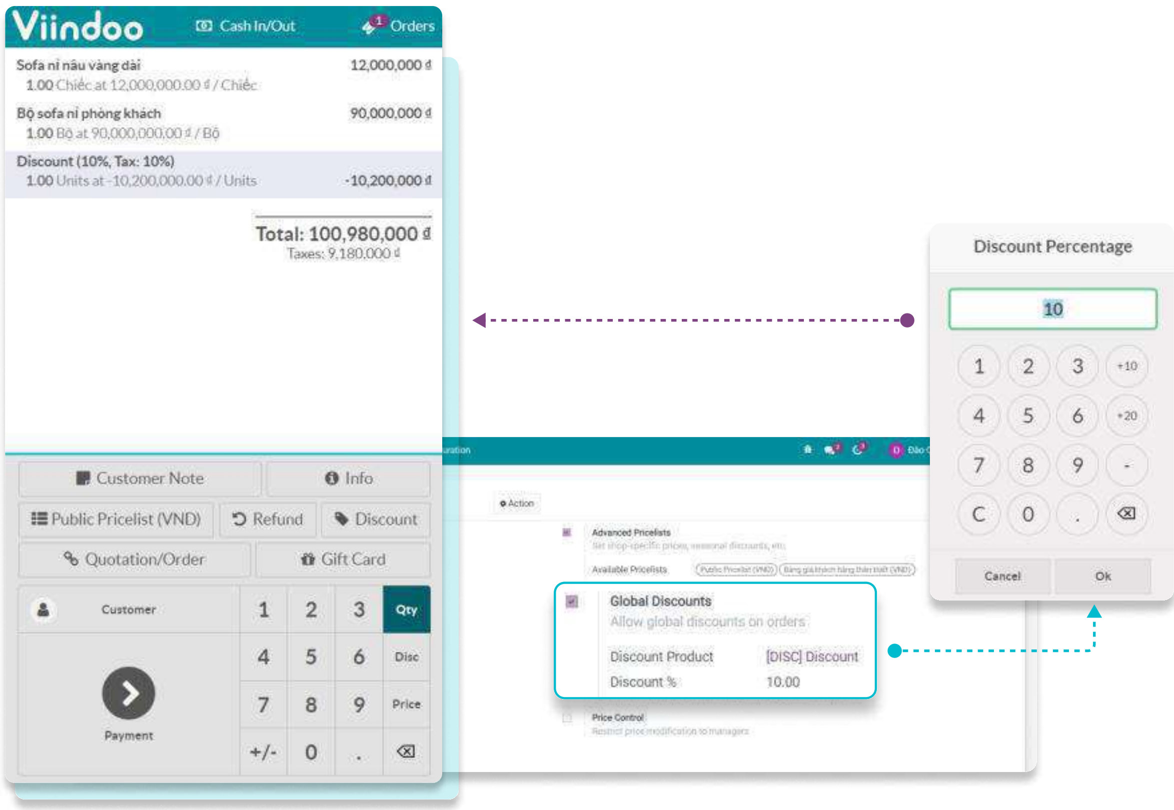
Navigate to **Point of Sale ‣ Configuration ‣ Point of Sale**. Select a point of sale that this promotion is applied to, in the **Pricing** section, enable the **Manual Discounts** feature and press **Save**.



On the sales session main screen, select the product to be discounted, click **Disc** to enter the discount percentage, the selling price of said product will be automatically recalculated accordingly.

Discount on total order

Activate the total order discount feature by navigating to **Configuration ‣ Point of Sale** and selecting the point of sale to apply. In the *Pricing* section, select the **Global Discounts** feature and press **Save**.

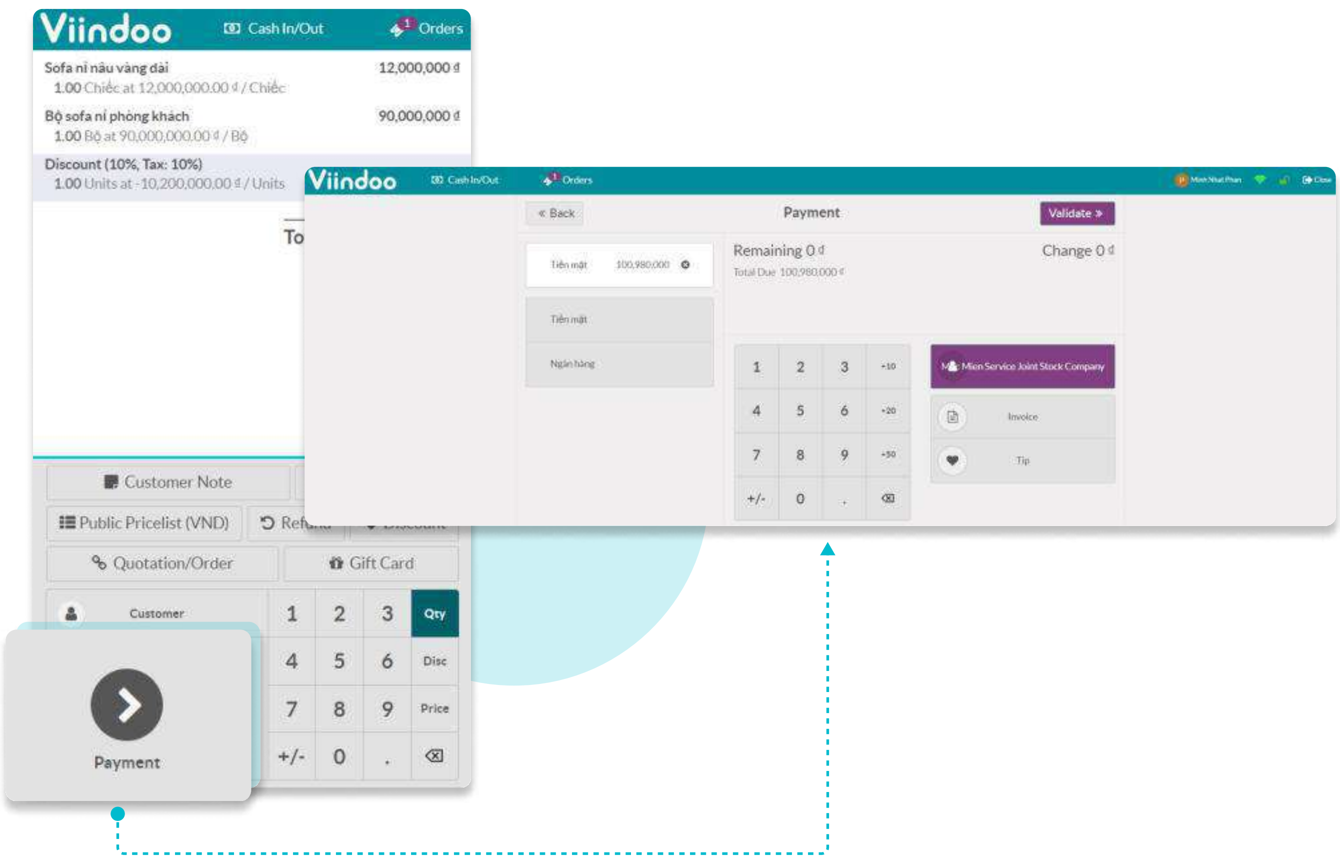


Next, you can create a sales order at the point of sale, add products to the order and select **Discount**.

On the pop-up window, add the discount percentage for this order, then press **OK**.

Record payment at the point of sale

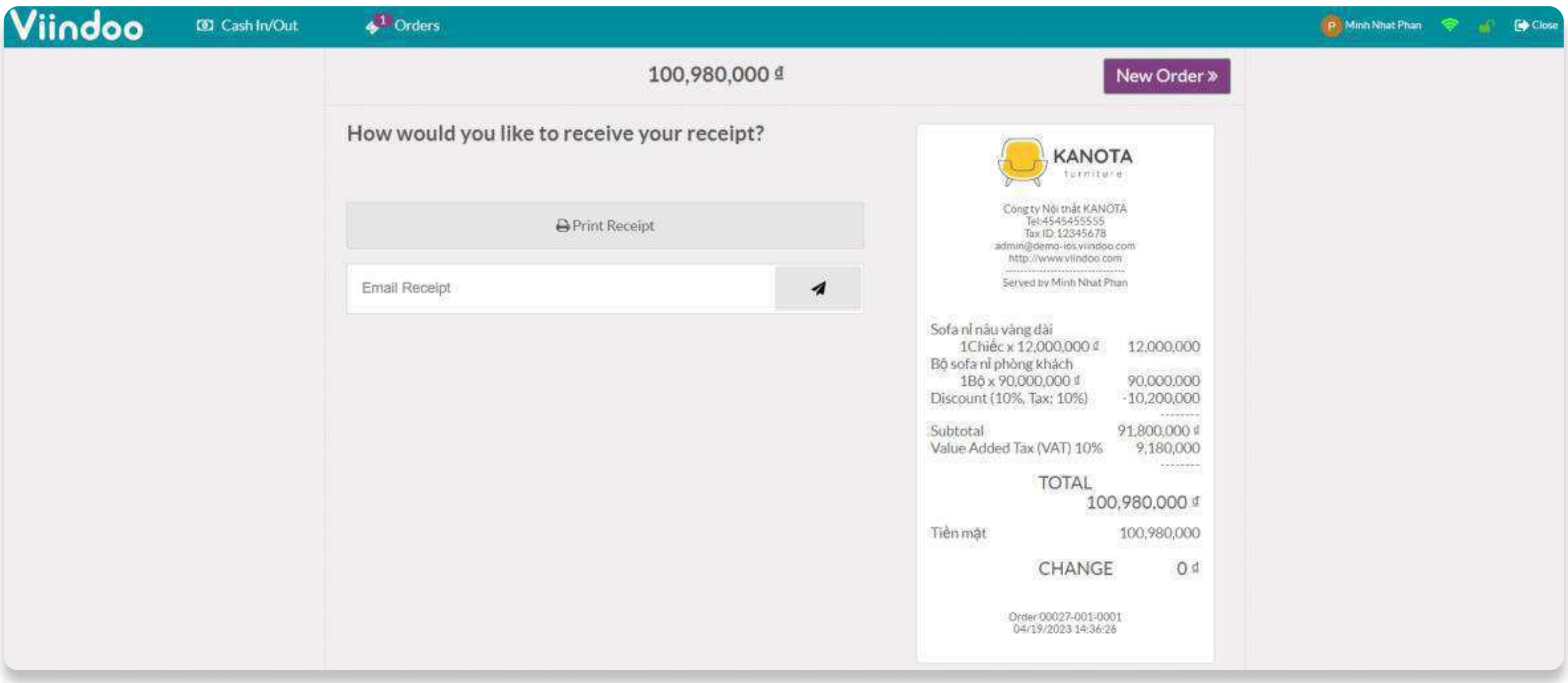
To proceed with the order payment, click **Payment**.



Select a payment method and press **Validate**.

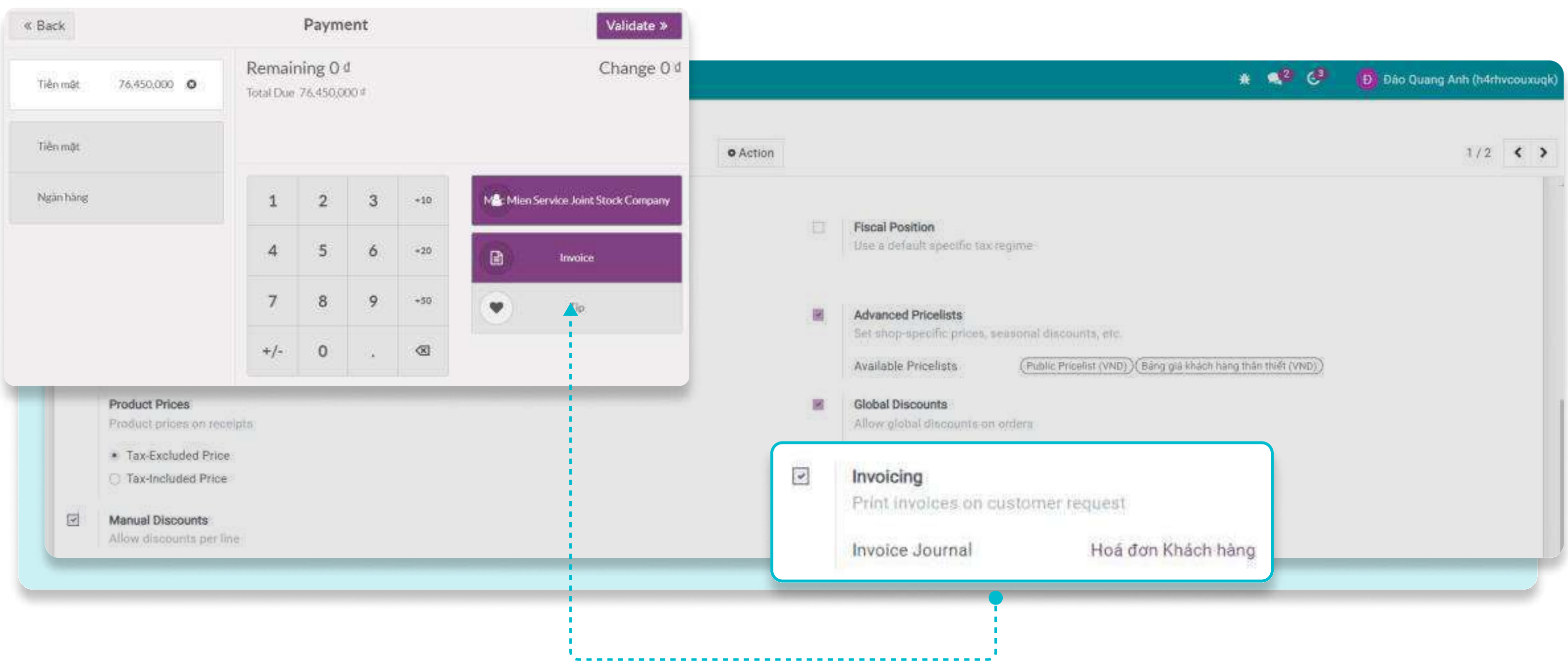
After confirming the payment, the system automatically displays the receipt of the order. You can print the receipt or email it to your customer.

Finally, start with your next order by clicking **New Order**.



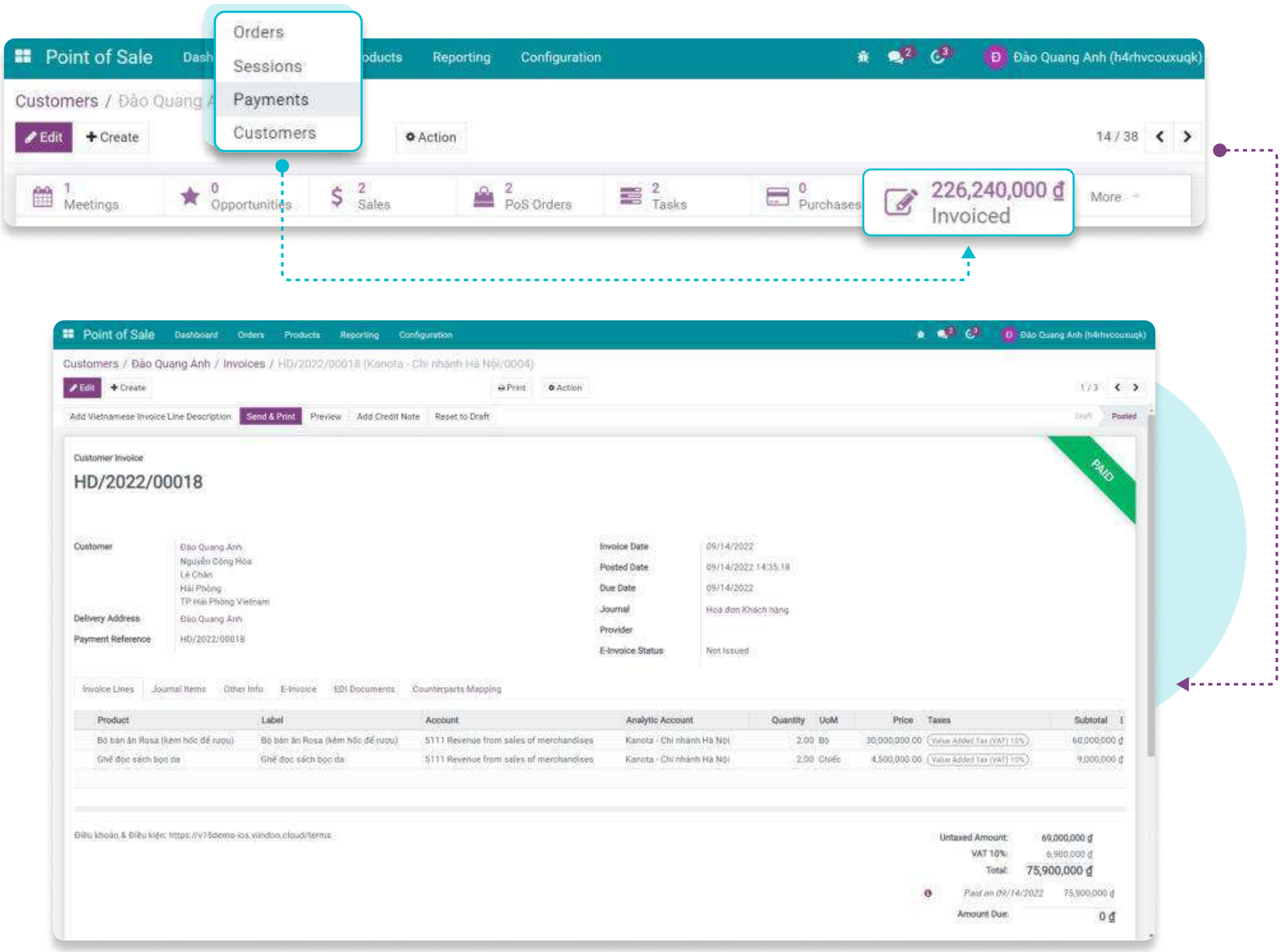
Issue invoices to customers

The *Point of Sale* app supports you to issue invoices right at the point of sale to customers. To activate this feature, navigate to **Point of Sale** ‣ **Configuration** ‣ **Point of Sale**, select the point of sale to set up. In the *Bills & Receipts* section, enable **Invoicing** and select the appropriate **Invoice Journal**. Then press **Save**.



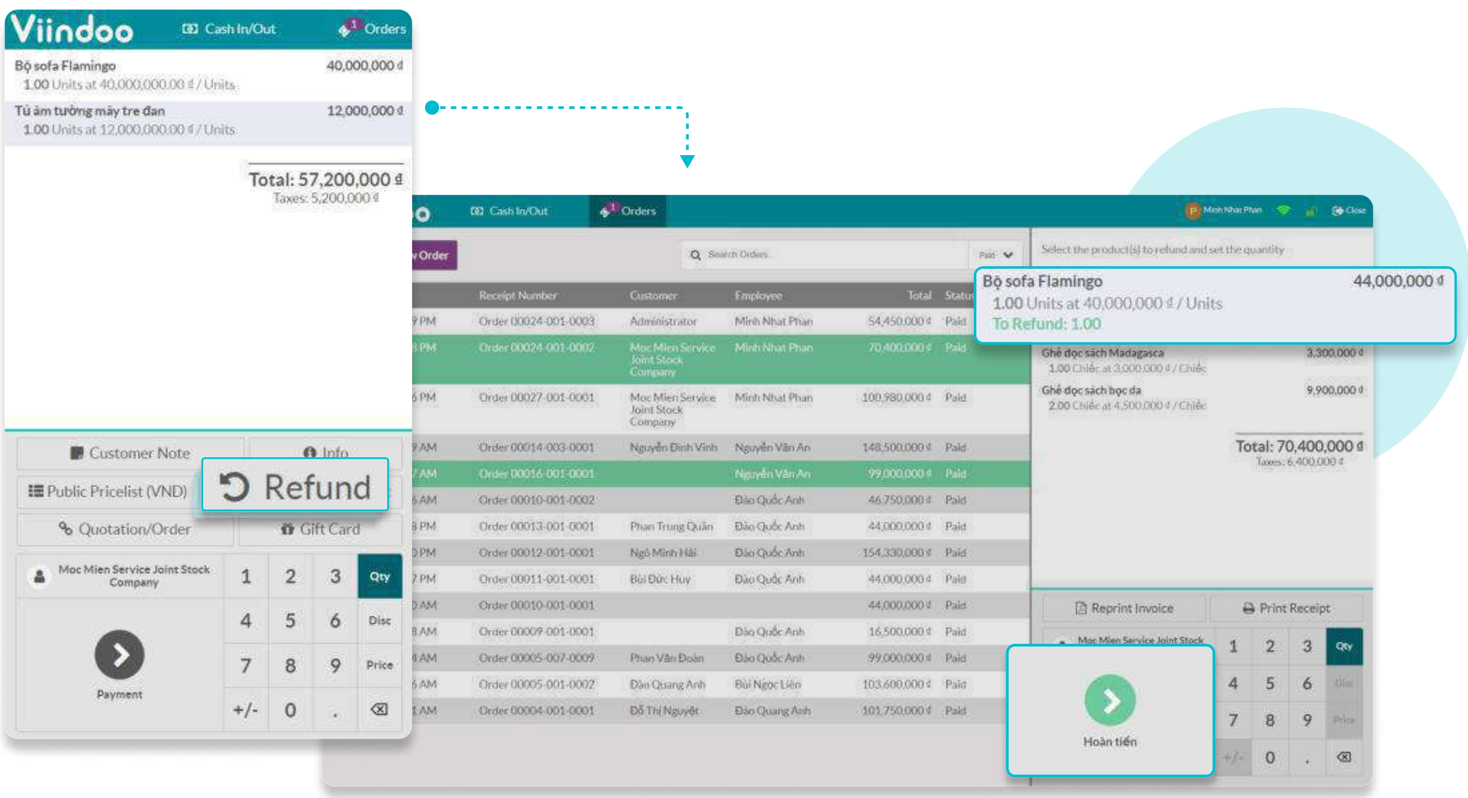
At the payment screen, select the customer's preferred payment method, select **Invoice** and click **Validate**.

To check the bill and send it back to the customer, the cashier needs to contact the manager who has the system user account. After successfully logging in to the system, navigate to **Point of Sale ‣ Orders ‣ Customers**, select the customer to check the invoice, go to the list of issued invoices, and select the respective invoice.



Refund products

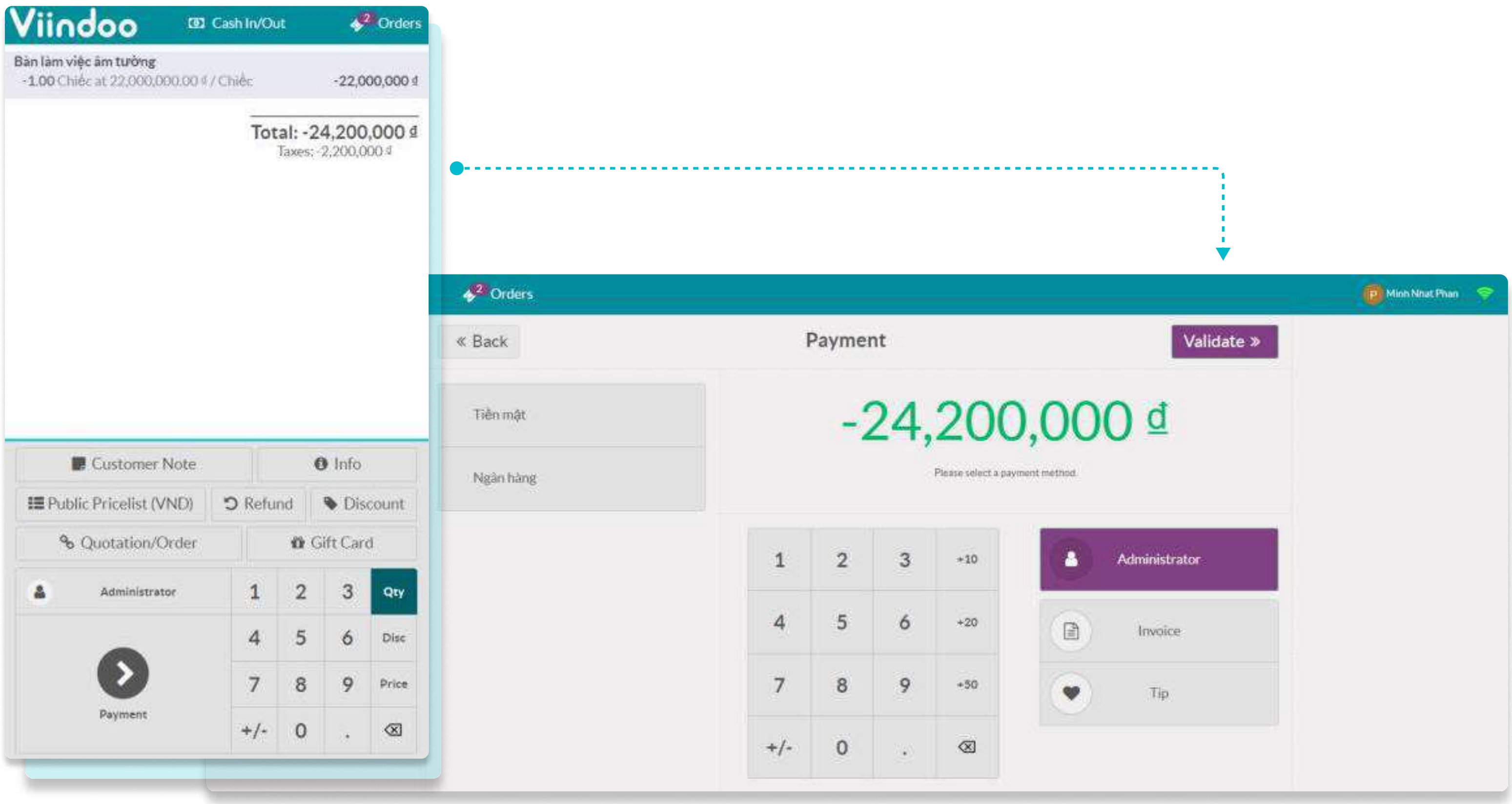
In case the customer wants to refund the products, on the Point of Sale view, click **Refund**.



The software navigates you to the list of orders, select the order you want to return:

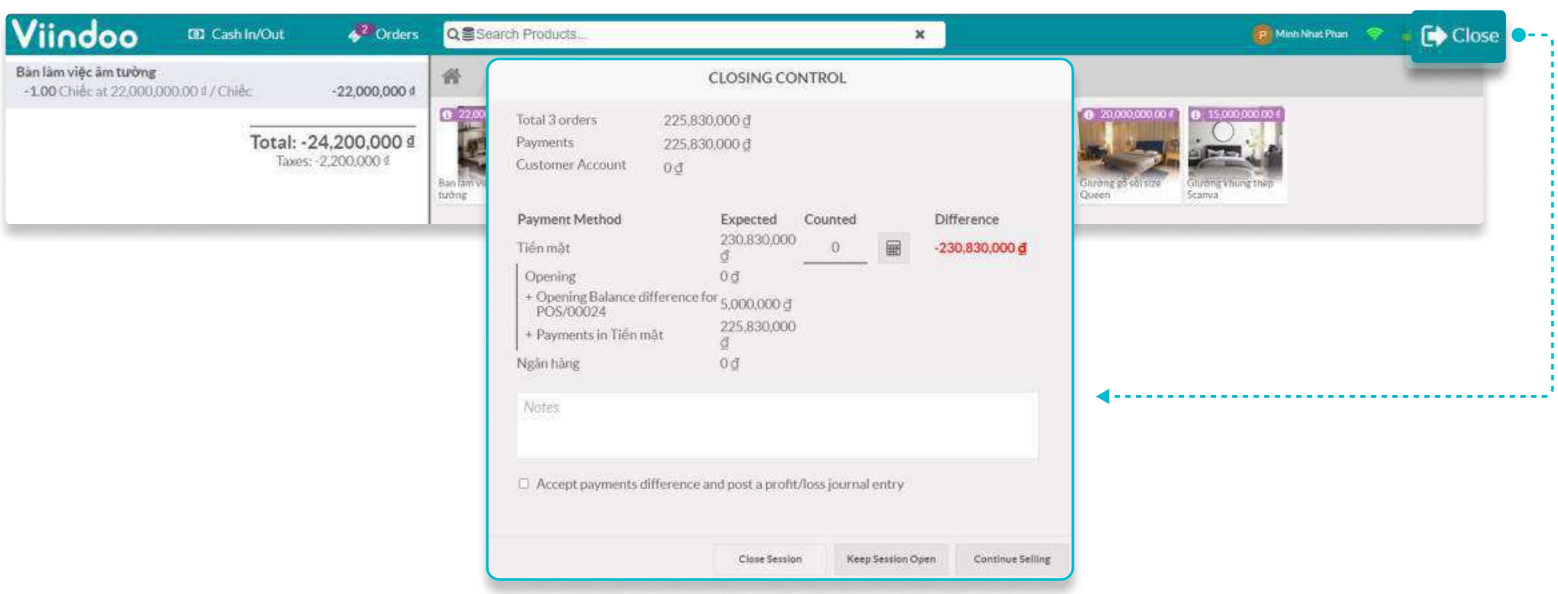
- *Refund a product:* Click **Qty** and enter the amount to be refunded then press **Refund**.
- *Refund a sales order:* Click **Refund**.

Next, you will be redirected back to the main sales session view. Click **Payment**, select a refund method for the customer, then click **Validate**.



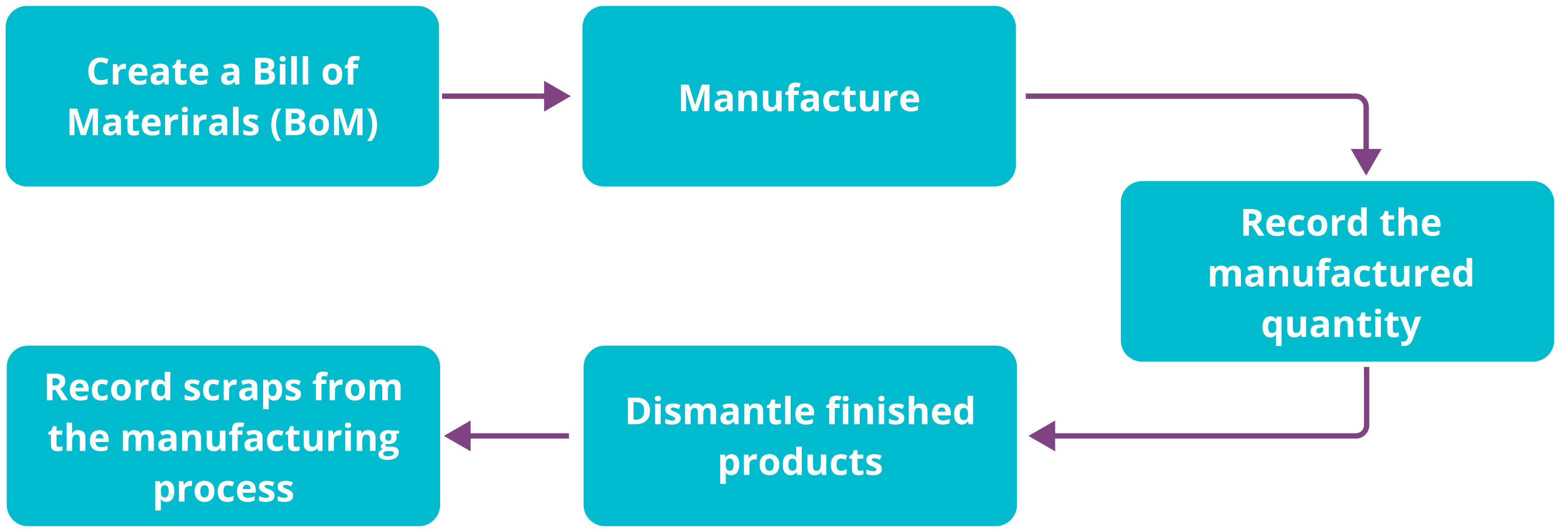
Close a sales session

At the end of the sales session, click **Close** to close the session



➡ See details at:

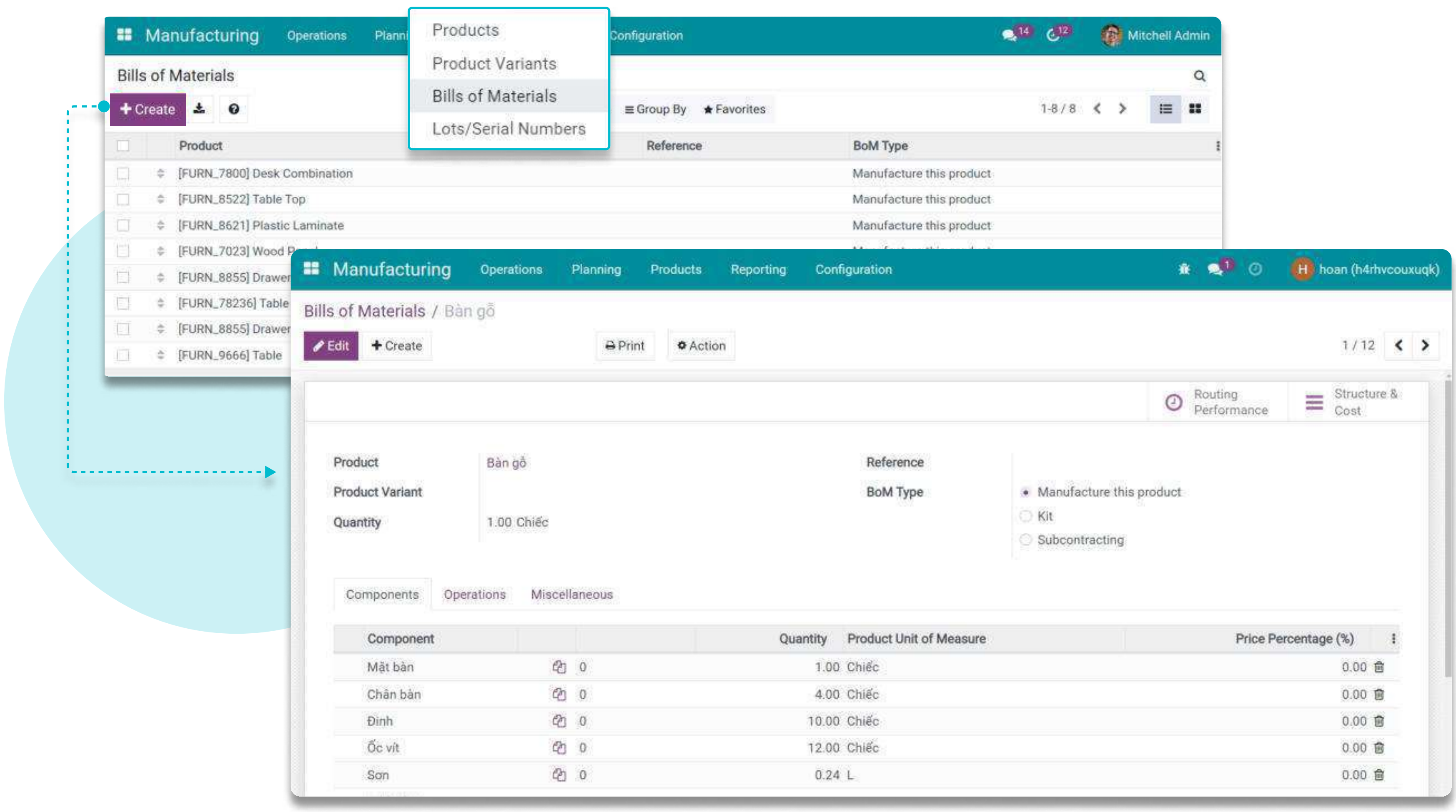
- *Cash control*.



➡ *Check out Viindoo's suggestions for manufacturing management by job positions in Appendix: Manufacturing management - (Page 140).*

CREATE A BILL OF MATERIALS (BoM)

Go to **Manufacturing ‣ Products ‣ Bills of Materials** and choose **Create.**

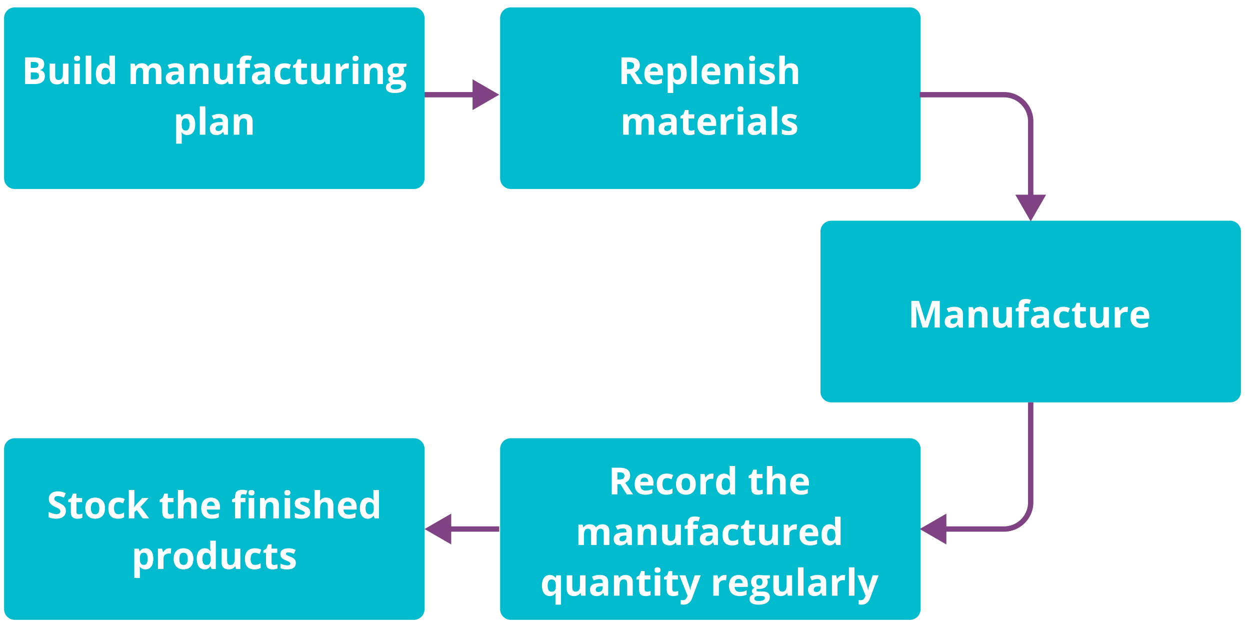


Add the following information for the Bill of Material:

- *General information:*
  - *Product:* Select finished or semi-finished products produced by this BoM.
  - *Quantity:* Enter the number of products produced from this BoM.
  - *Reference:* Enter information for reference.
  - *BoM Type:* Select Manufacture this product to use this BoM for production.
- ***Components*** *Tab:* Click **Add a line** to add materials to be consumed in the manufacturing process.
  - *Component:* Select materials from the product list.
  - *Quantity:* Enter the number of materials to be consumed.

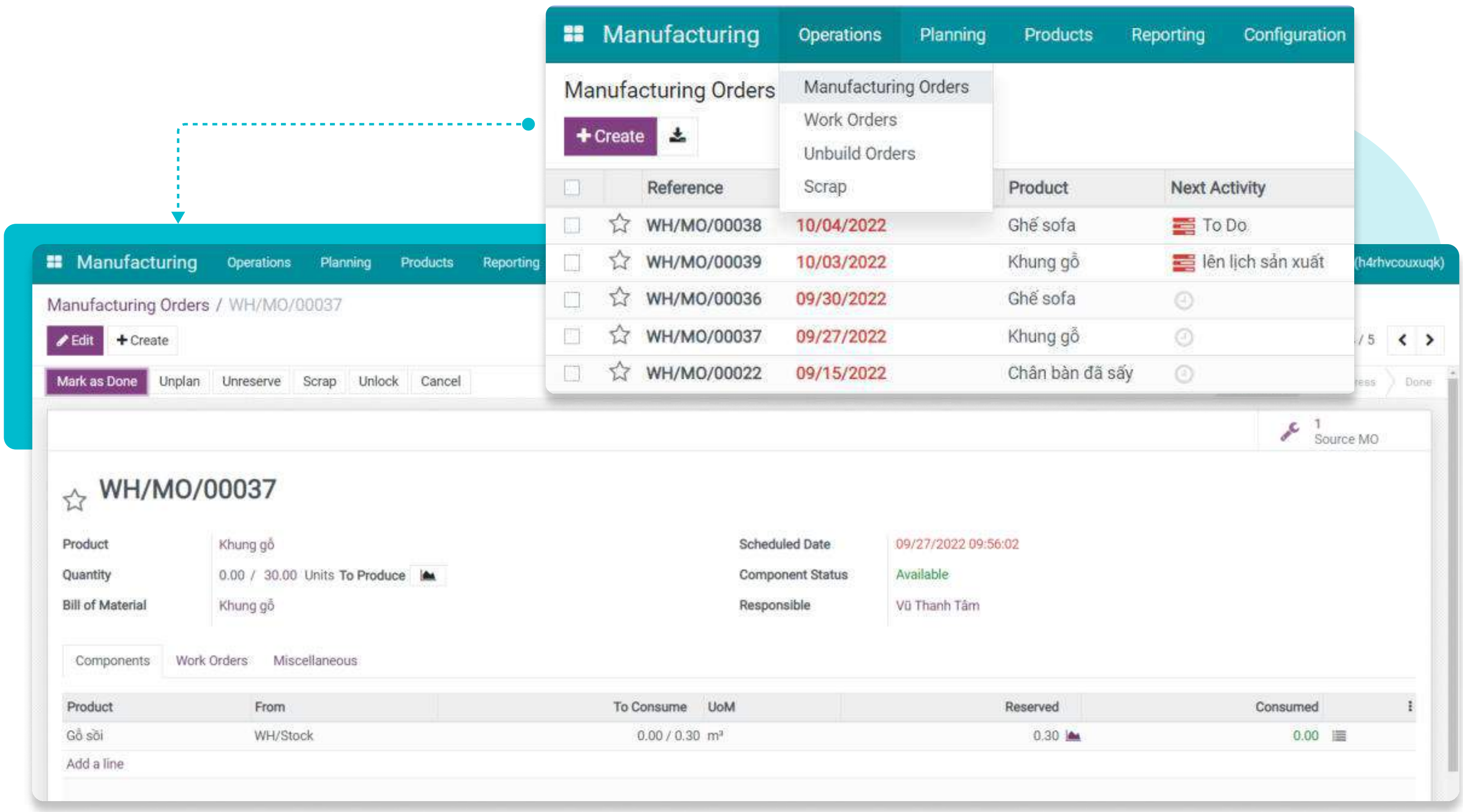
Then press **Save.**

MANAGE MANUFACTURING PROCESS



Build manufacturing plan

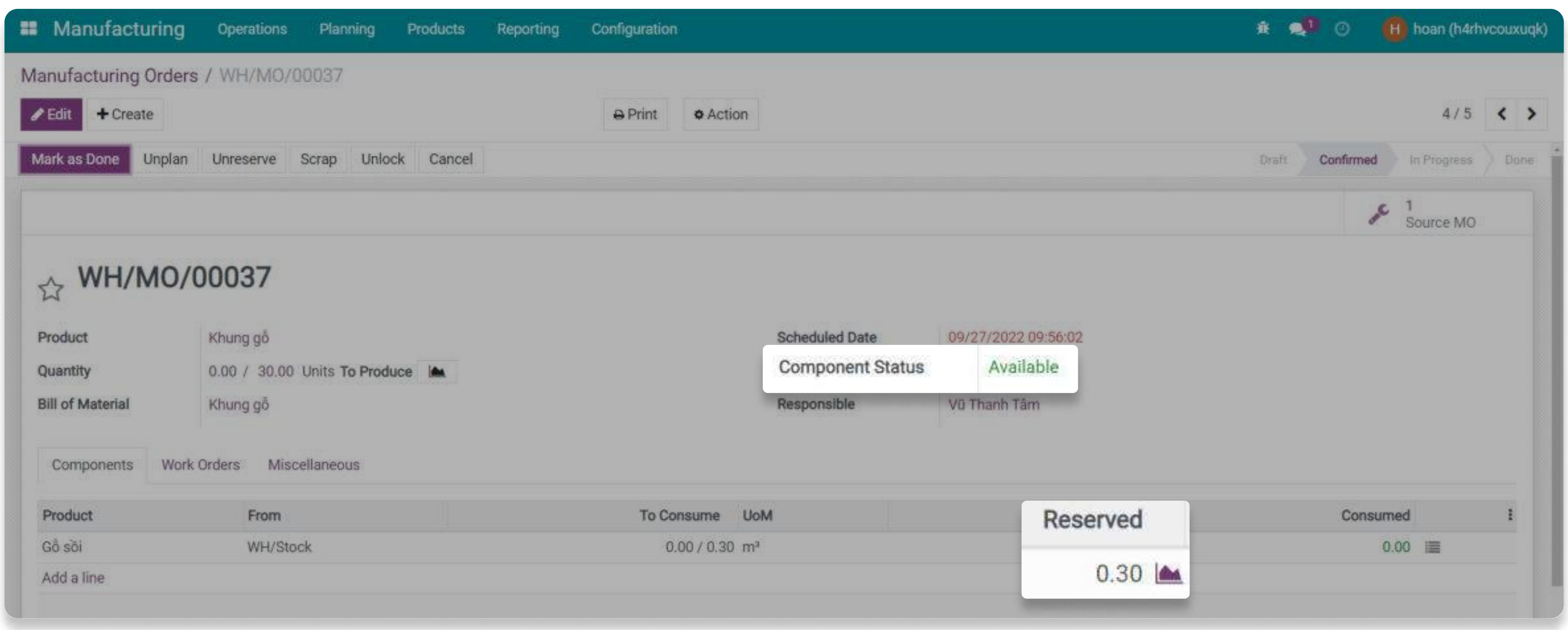
Go to **Manufacturing ‣ Operations ‣ Manufacturing Orders** and select **Create** to initiate a manufacturing order to be managed on the system.



Select the product, enter the quantity, and adjust the expected start date of production in the **Scheduled Date** field, the rest of the information will be automatically filled in based on the BoM.

Replenish materials

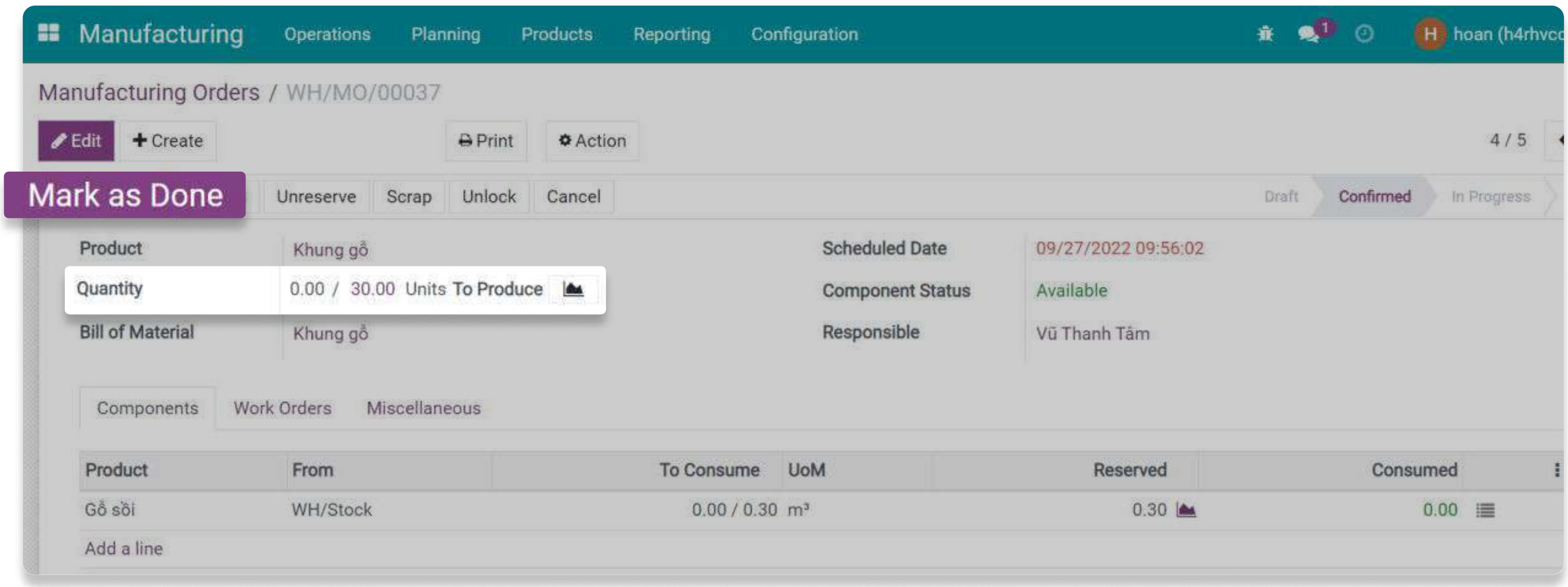
Ensure the information on the manufacturing order is correct, then press **Save ‣ Confirm.** The required material inventory is automatically checked and reserved for the confirmed manufacturing order.



If there is not enough stock for the required materials, a warning will be displayed on the manufacturing order. The manufacturing manager in charge can take that into consideration when planning for the procurement of necessary materials.

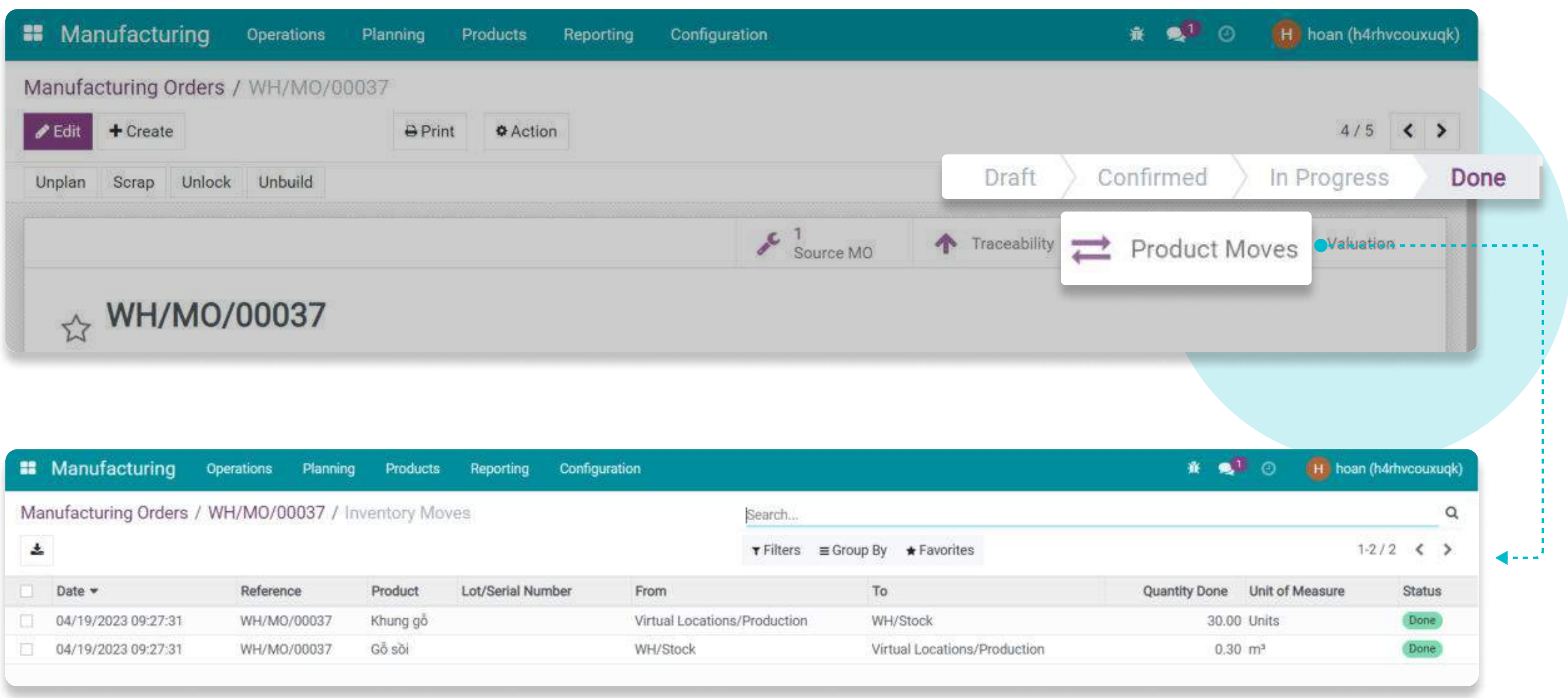
Periodically record the quantity of finished products

After production is complete, select **Mark as Done** to update automatically the finished product quantity or update manually by selecting **Edit** and entering the actual completed quantity.



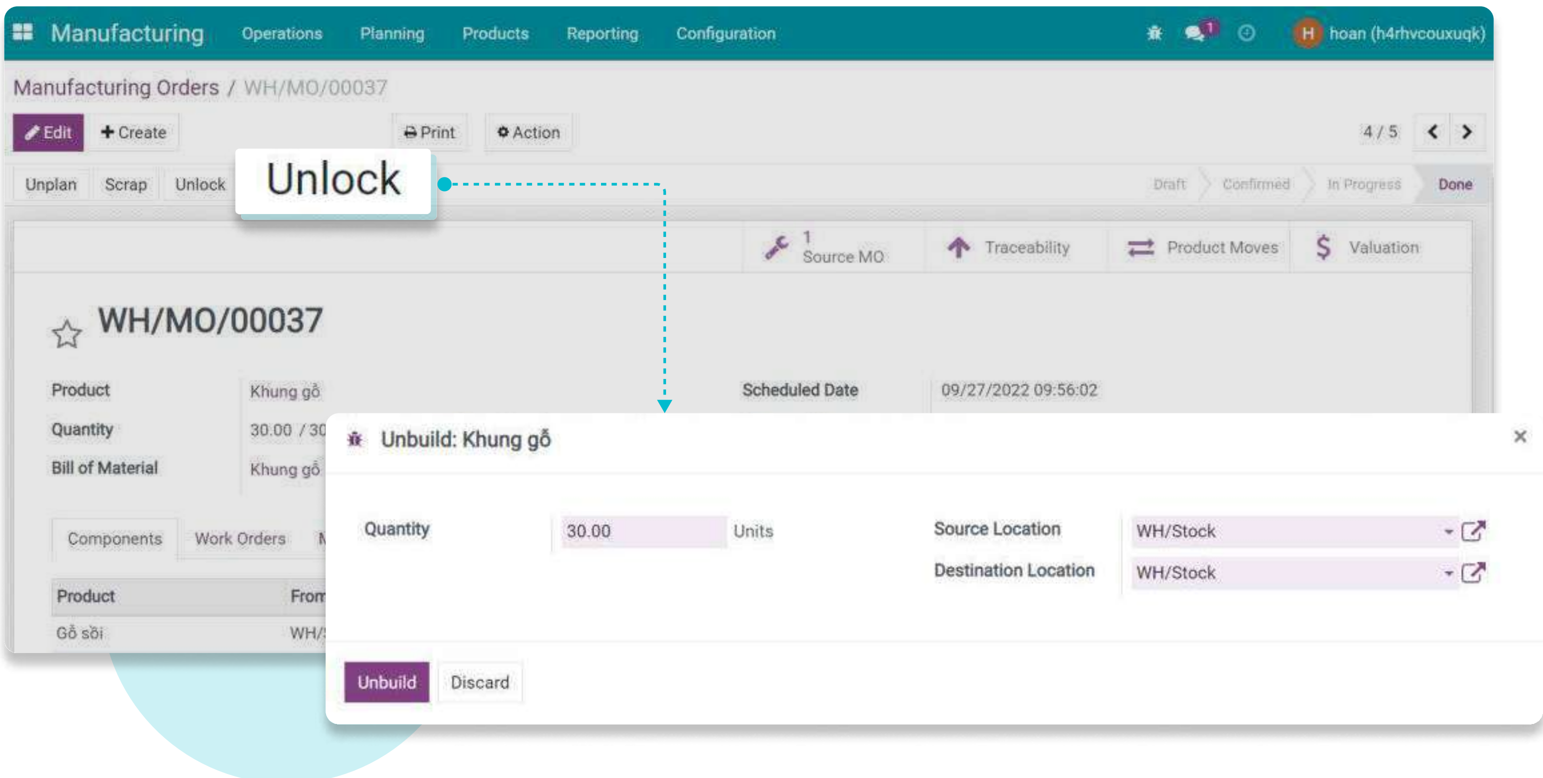
Periodically record the quantity of finished products

Once the manufacturing order is marked as **Done**, transfer slips are automatically created to send the finished products to the respective inventory and record the consumed materials. On the manufacturing order interface, press **Product Moves** to view transfers details.



DISMANTLE FINISHED PRODUCTS

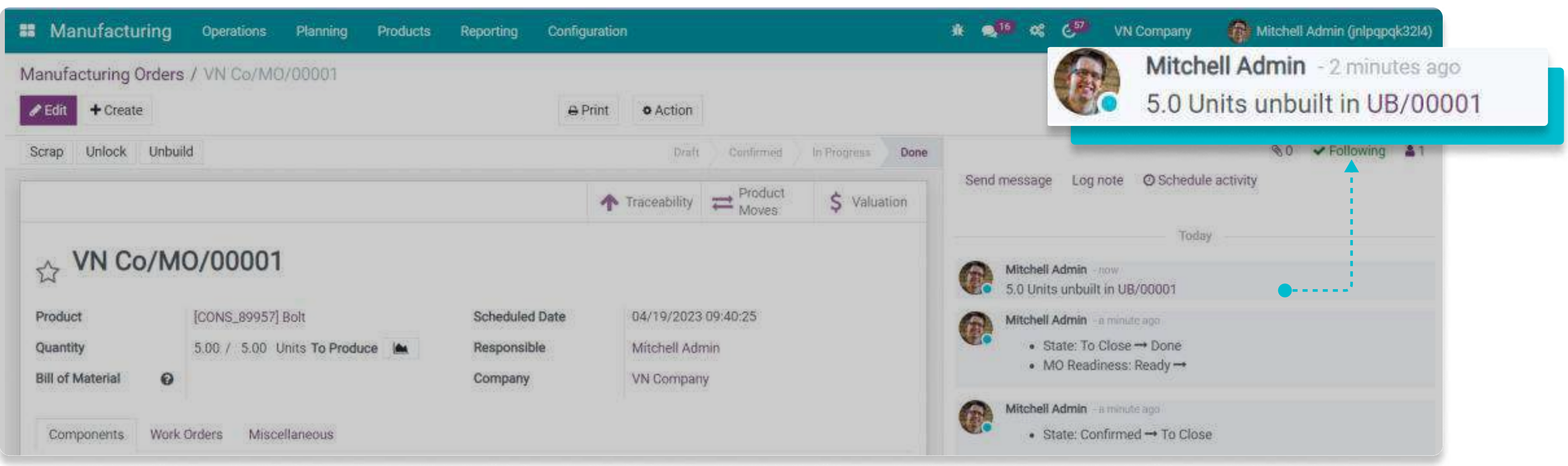
In case you need to dismantle the finished product due to errors or unacceptable parts, you can select **Unbuild** right on the completed manufacturing order.



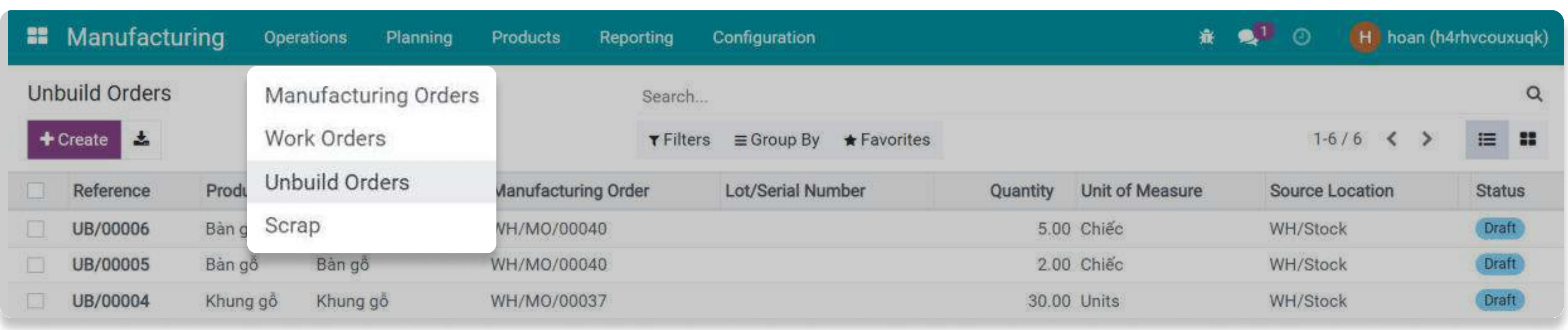
The following information is required for the dismantling order:

- *Quantity:* Add the number of finished products to be disassembled.
- *Source Location:* The current storage location of the finished product.
- *Destination Location:* The location where materials will be sent to after being disassembled.

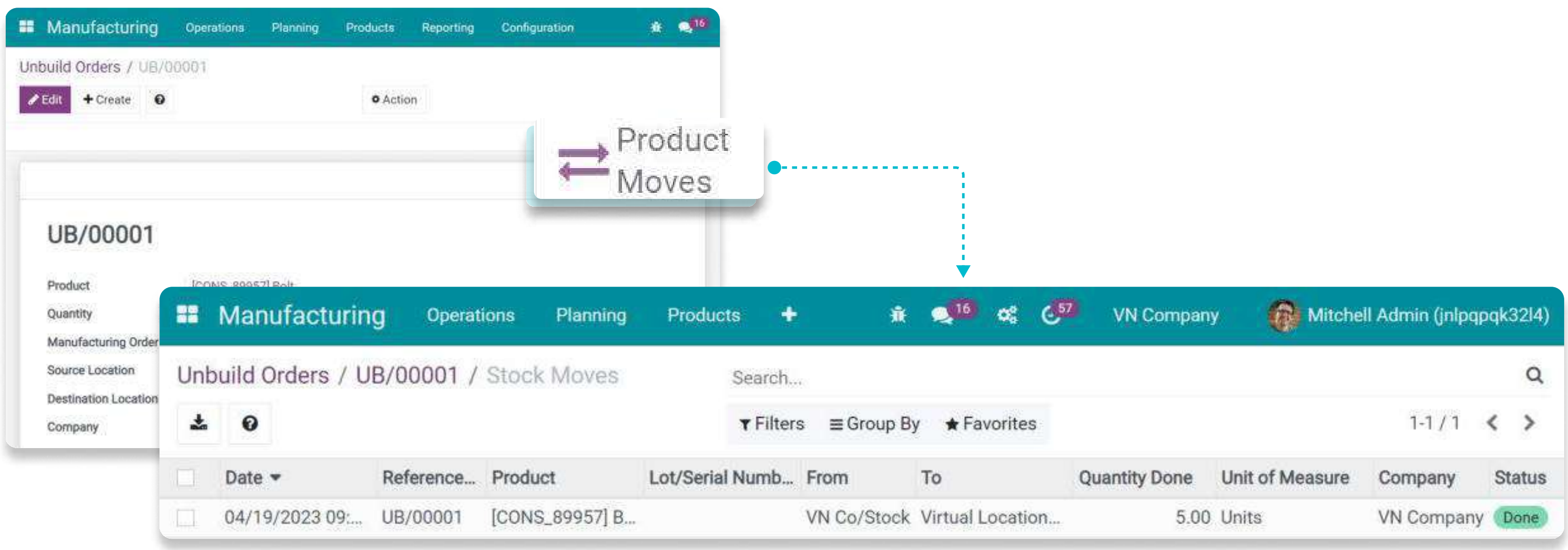
Press **Unbuild** to finish. You can look up the relevant unbuild orders in the chatter area of the manufacturing order.



Or go to **Manufacturing ‣ Unbuild Orders**, search by the dismantled product name or the related manufacturing order code.

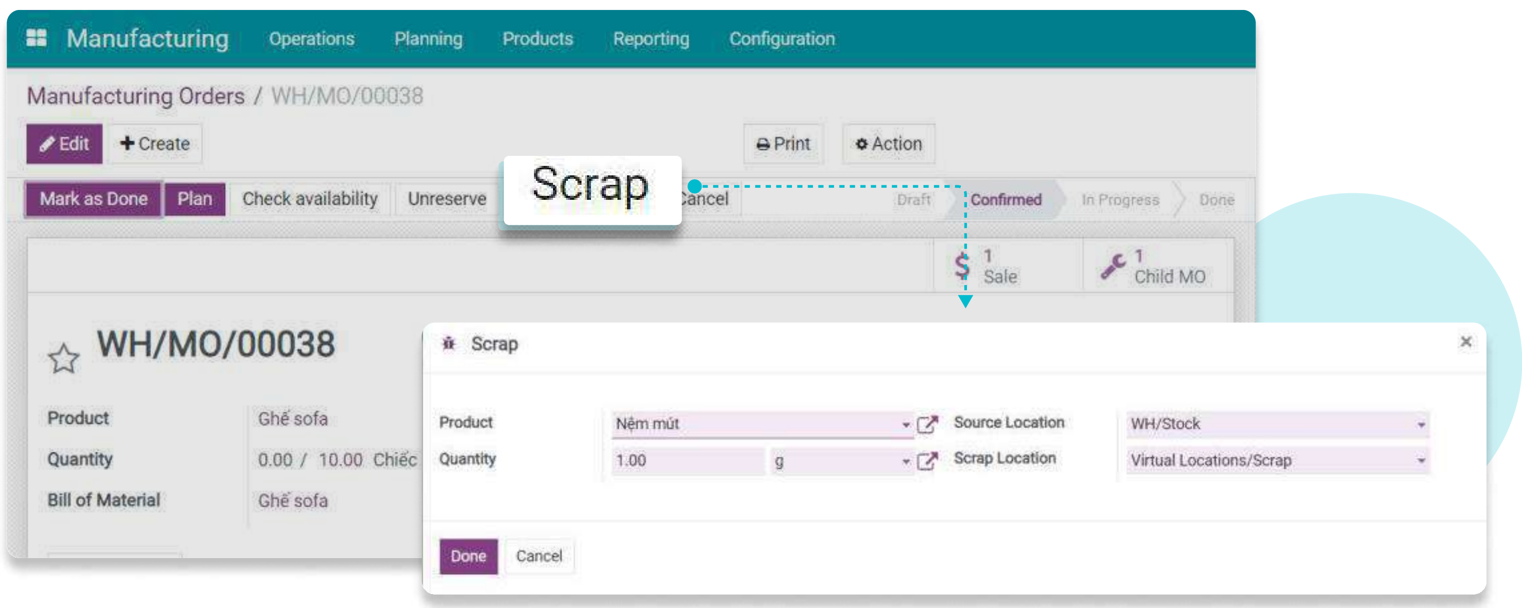


You can also view the transfers automatically generated for the disassembling operation and stocking the materials back into the warehouse by clicking on the **Product Moves** button on the unbuild order interface.

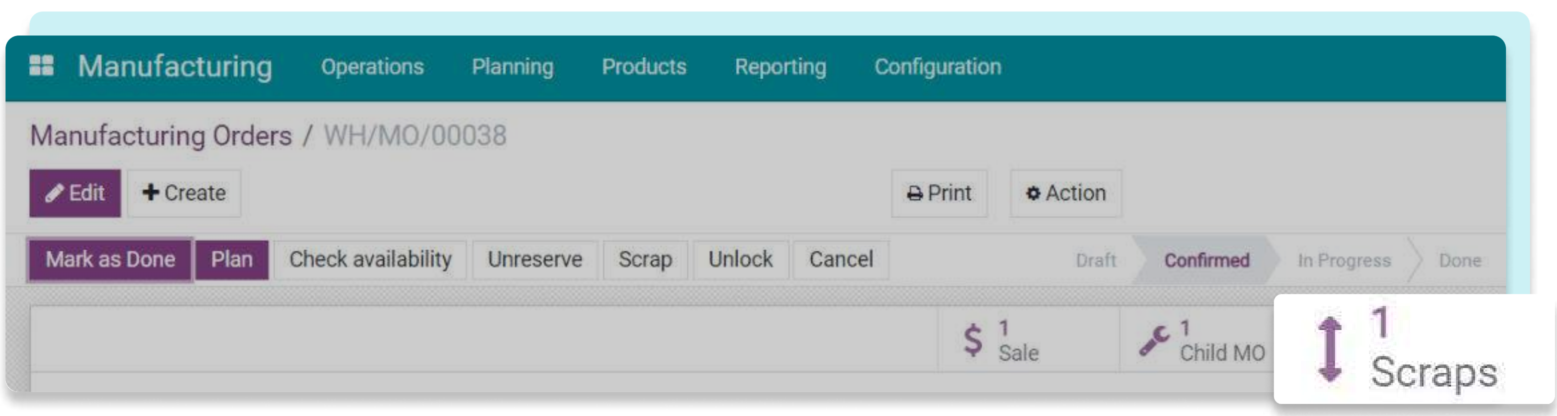


RECORD THE SCRAPS FROM MANUFACTURING PROCESS

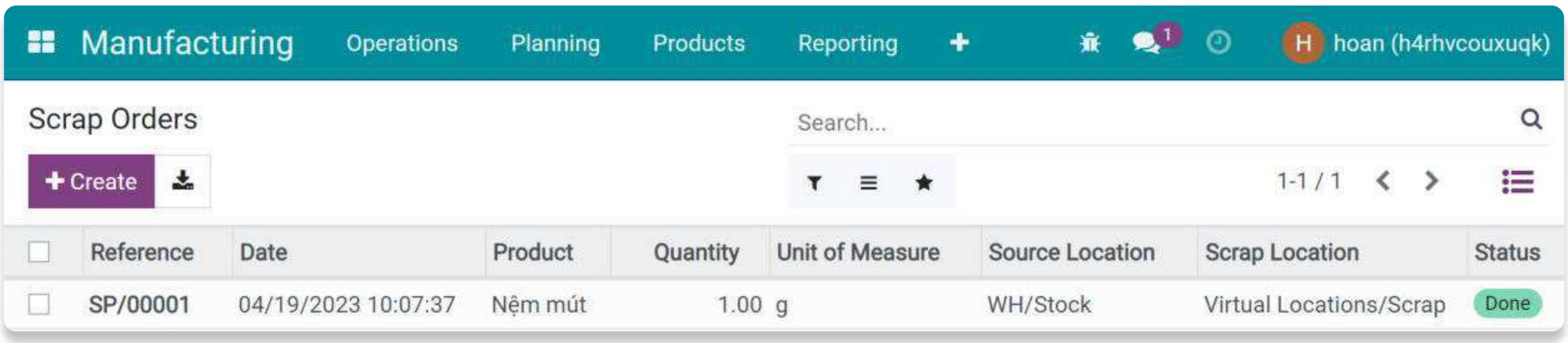
On the manufacturing order, select **Scrap**, enter the number of defective products to be turned into scrap and select **Done.**



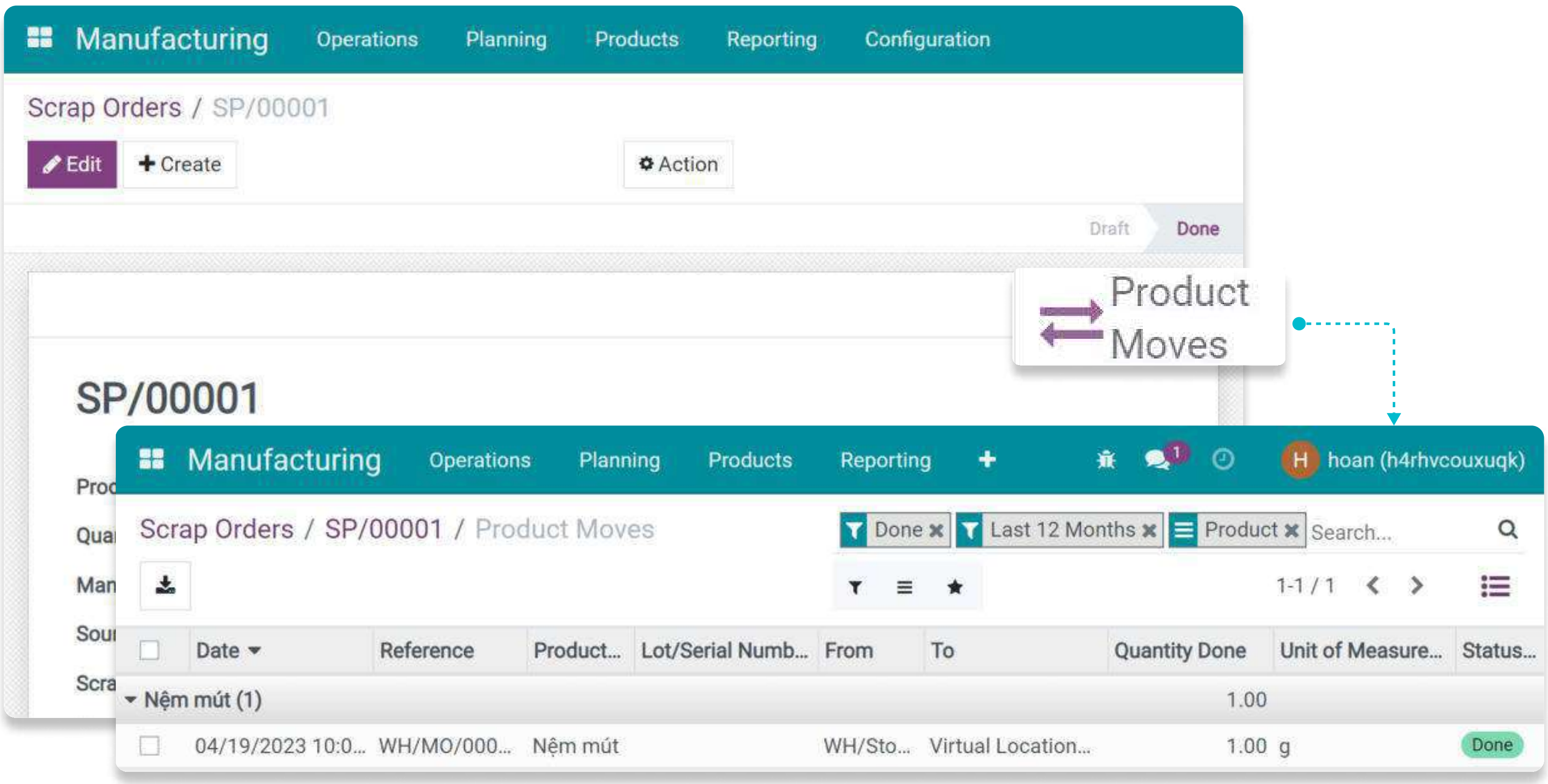
You can look up the transfers made to record the **scraps** by clicking Scrap on the manufacturing order.



Or go to **Manufacturing ‣ Operations ‣ Scrap** and search by the scrapped product name.



On the scrap interface, select **Product Moves** to see information about the product moves.



INVENTORY MANAGEMENT

Optimize costs & resources, enhance supply efficiency

Real-time Inventory

Automatically update inventoryas soon as a stock move is confirmed.

No-excess Supply

Understand which, when, and how many items are needed to replenish.

Improve the cash conversion cycle

Adjust the inventory cycle to improve inventory investment turnover

Process Incoming Products → **Deliver Products** → **Inventory Adjustment**

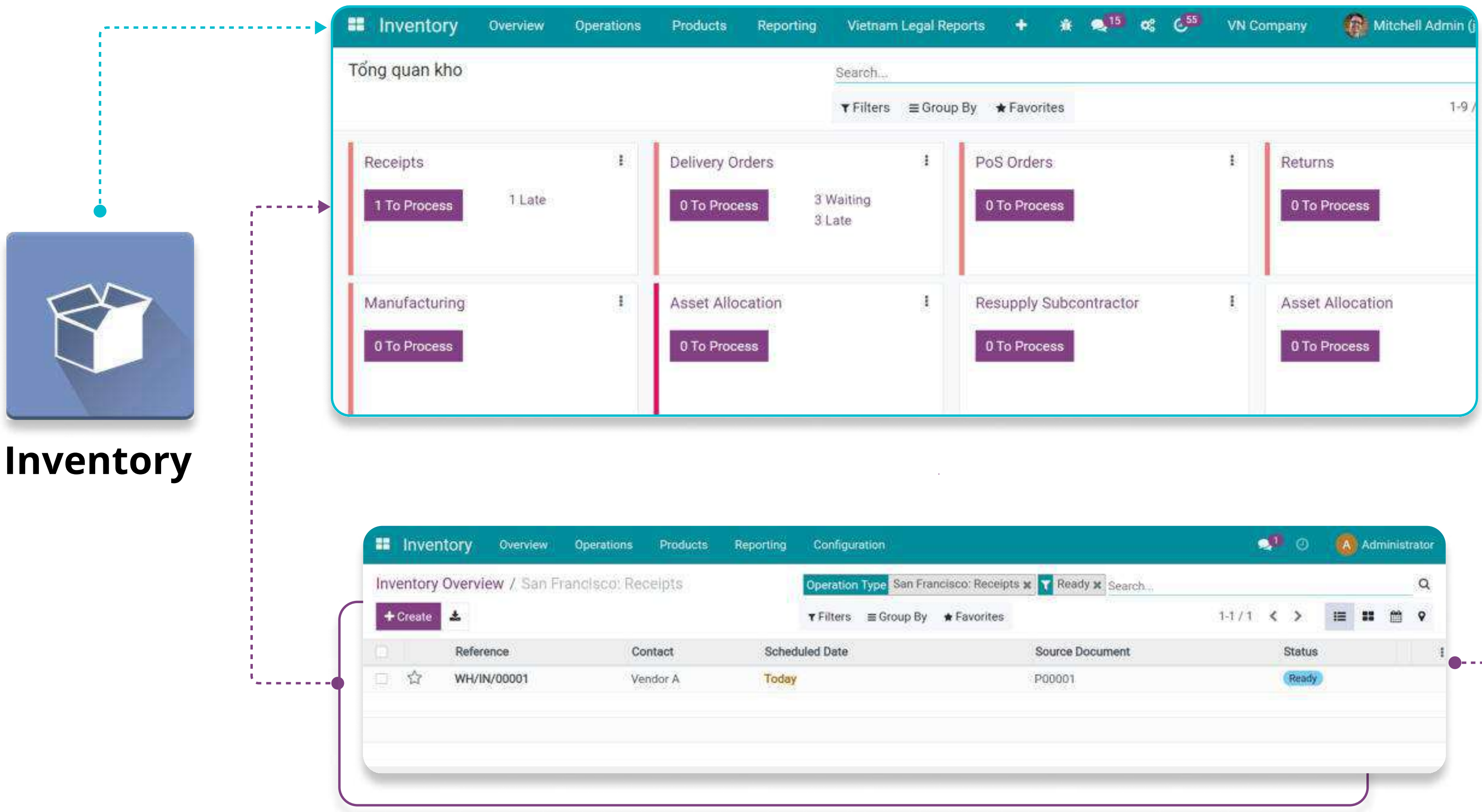
1. Process Incoming Products
2. Deliver Products
3. Inventory Adjustment

> ➡ *Check out Viindoo's suggestions for inventory management by job positions in Appendix: Inventory management - (Page 139).*

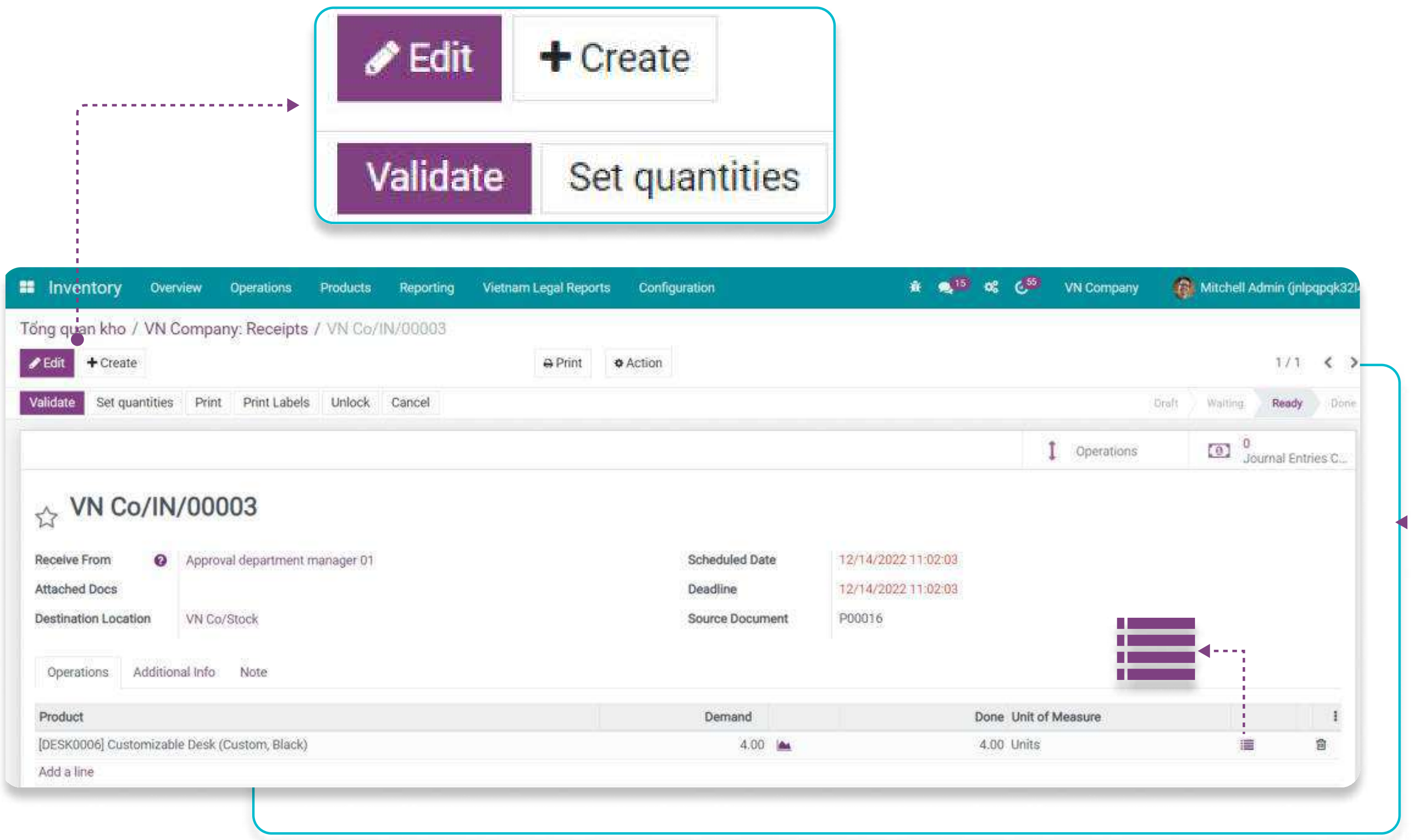
PROCESS INCOMING PRODUCTS

Receive products in one order

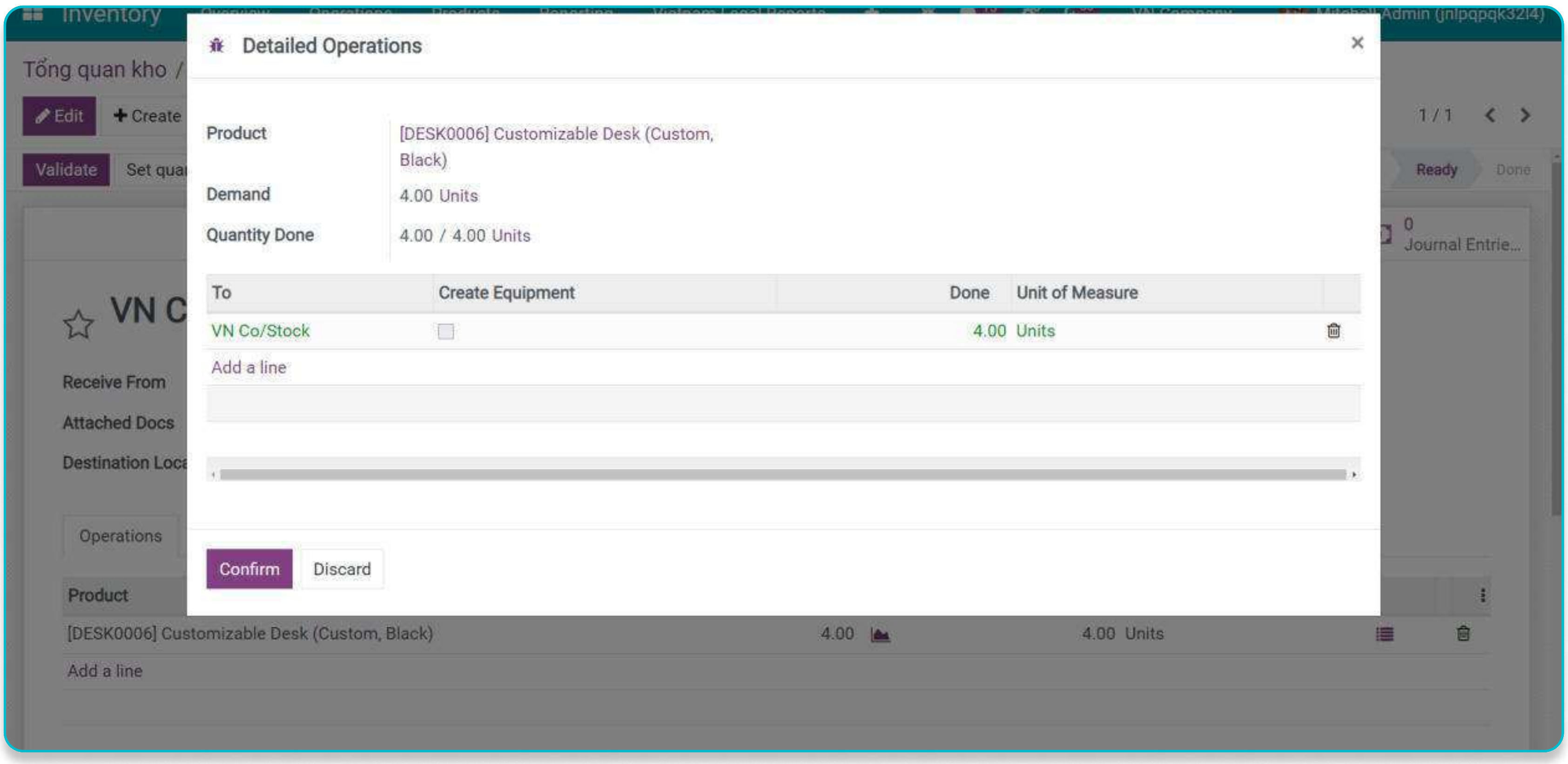
Step 1: Access the **Inventory** app, at the *Overview* interface, go to **Receipts** then press **To Process** to check and confirm the warehouse transfers.



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

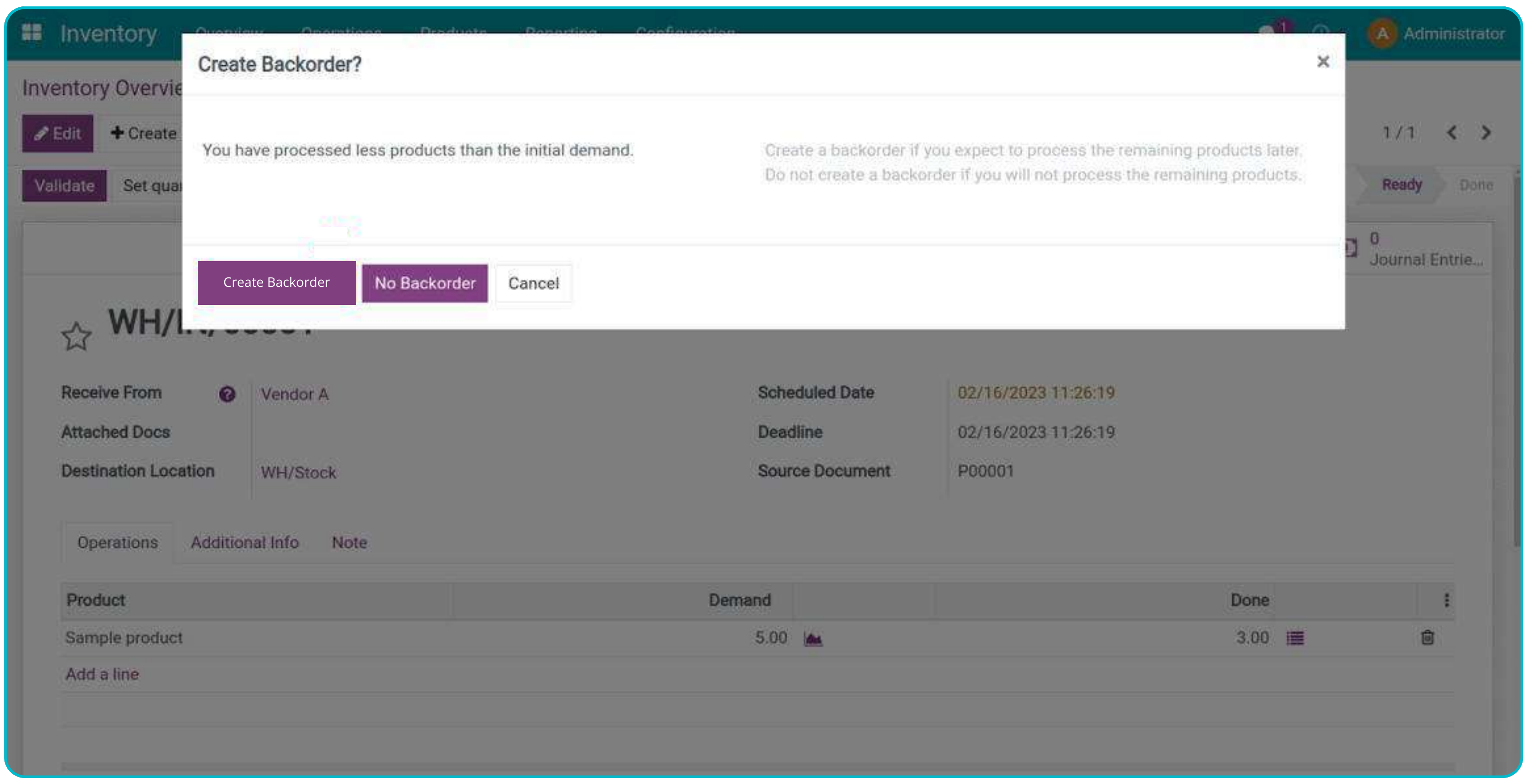


Step 3: At the inventory receipt transfer, press **Confirm** to complete. After confirming the received quantity, this information will be updated on the *Inventory Report*.



Receive products in multiple orders

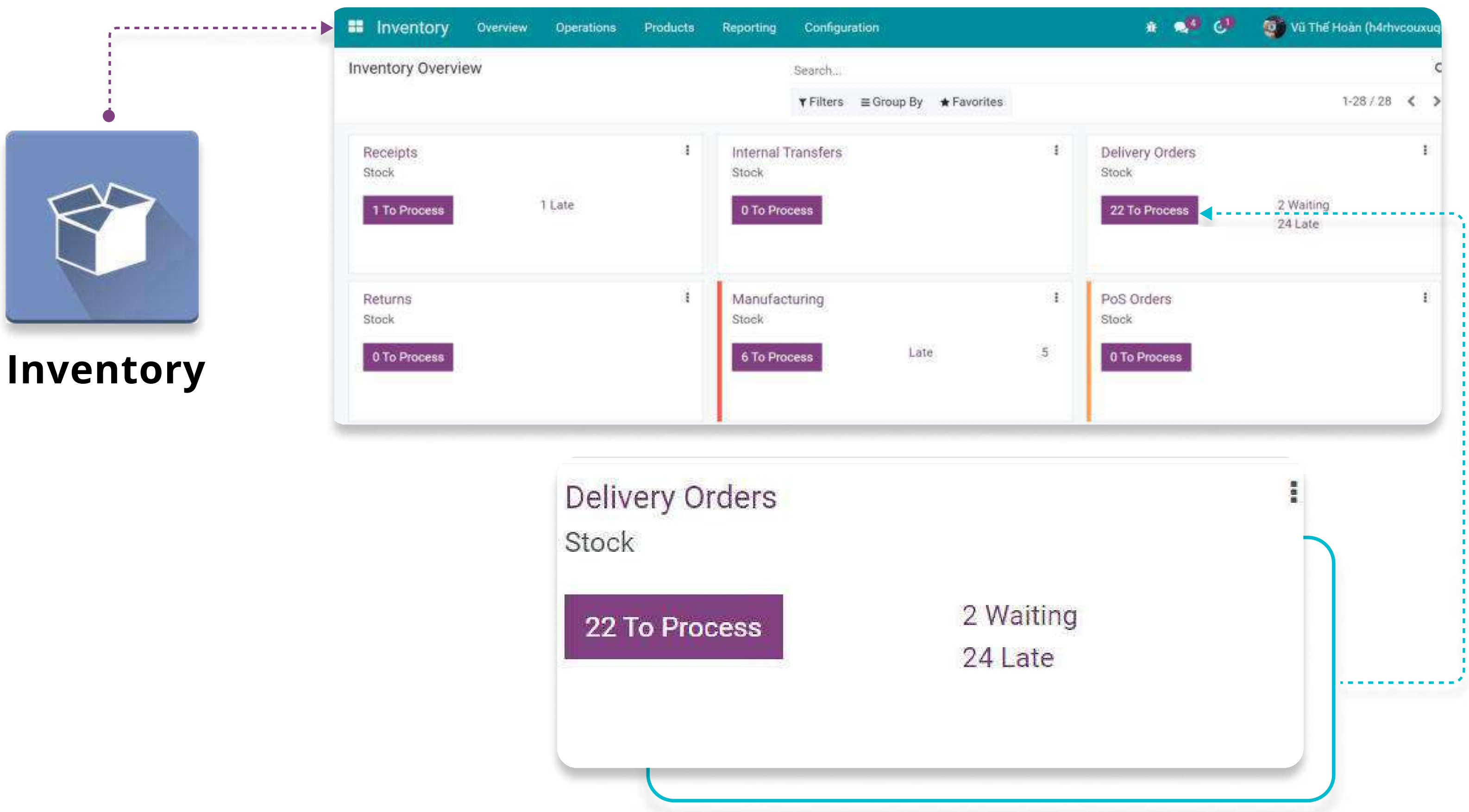
> **Note**
>
> When the vendor delivers your order in various deliveries, proceed the similar steps as when you receive goods all at once. However, in **step 3**, after confirming the inventory receipt transfer, a pop-up window will be displayed, click **Create Backorder** to generate the transfer slip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



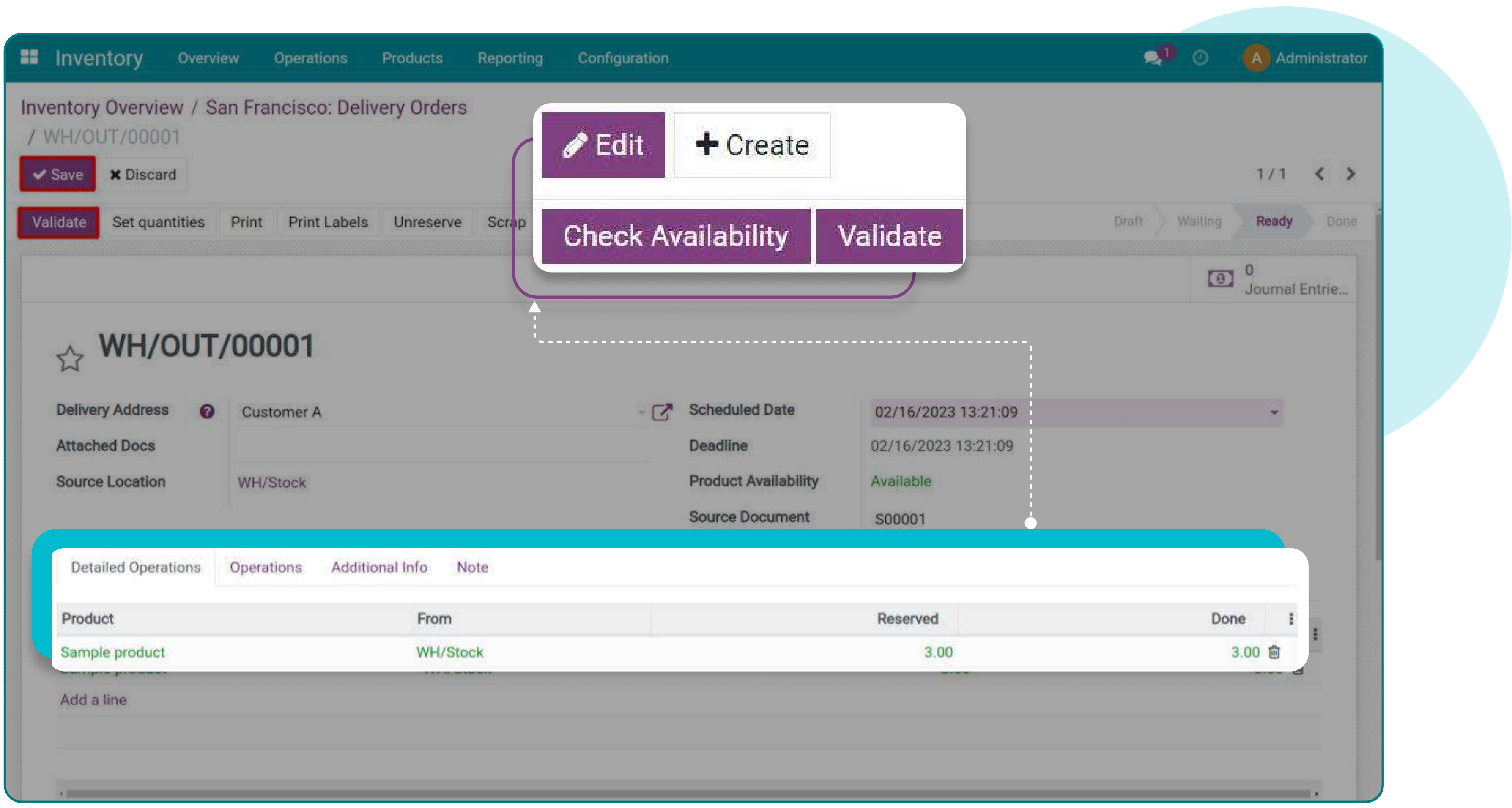
DELIVER PRODUCTS

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.

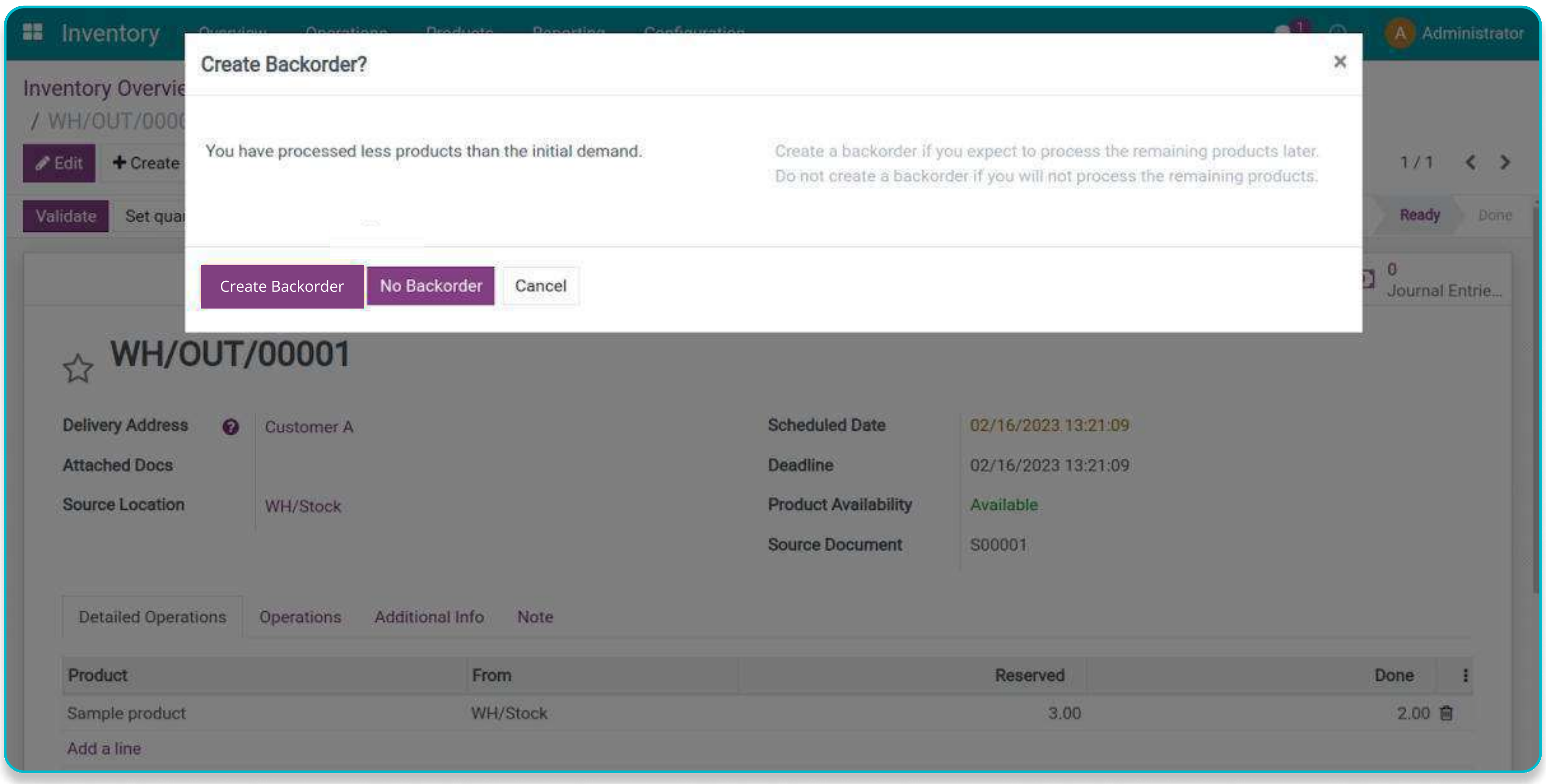


Step 2: Click on the delivery order. Then, press **Edit**, at the **Detailed Operations** tab, and add the number of delivered quantities. Then press **Save ‣ Confirm.**



Delivery products in multiple orders

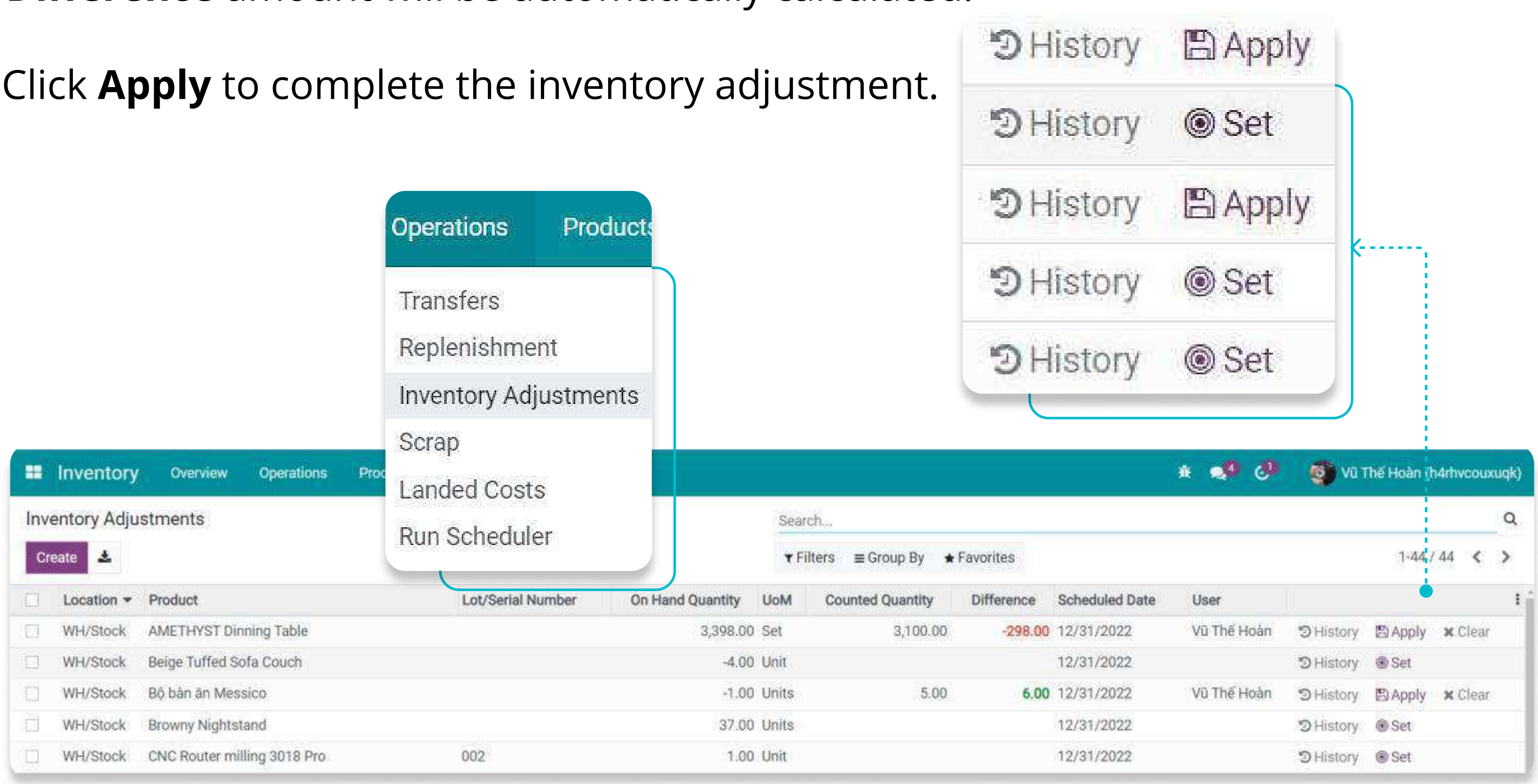
> **Note**
>
> When you deliver your order in multiple deliveries, proceed the similar steps as when you deliver products all at once. However, in **step 2**, after confirming the inventory delivery order, a pop-up window will be displayed, click **Create Backorder** to generate the transfer slip for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



INVENTORY ADJUSTMENT

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

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



LIABILITIES ACCOUNGTING MANAGEMENT

The diagram above depicts a typical liabilities accounting management process of a business. However, you can apply this process flexibly according to the reality of your business.

> ➡ *Check out Viindoo's suggestions for liabilities accounting management by job positions in Appendix: Liabilities accounting management - (Page 141).*

CREATE AND ISSUE 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.

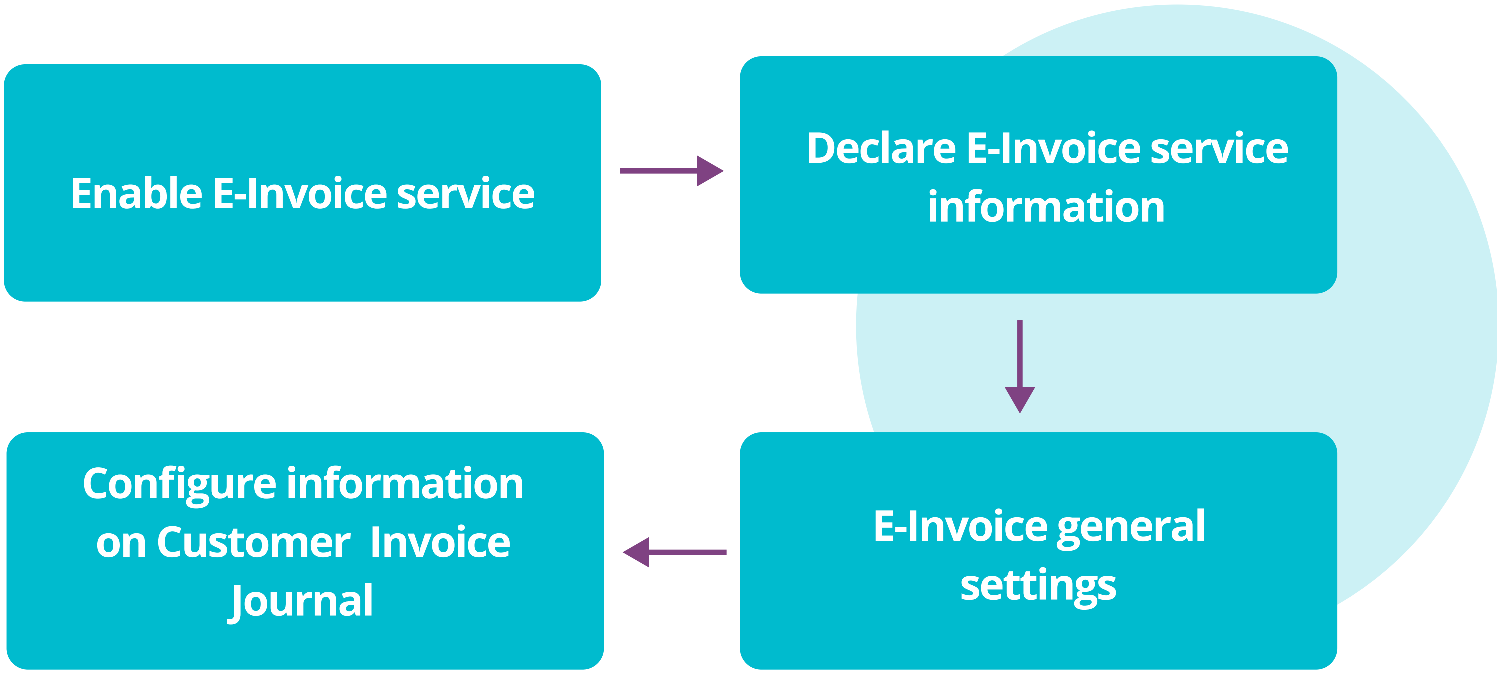
Issue internal invoices on Viindoo software: If you only want to monitor internal liabilities on the system or use another platform to issue E-invoices.

➡ See details at:

- *Create customer invoices*.

Issue E-Invoices to customers

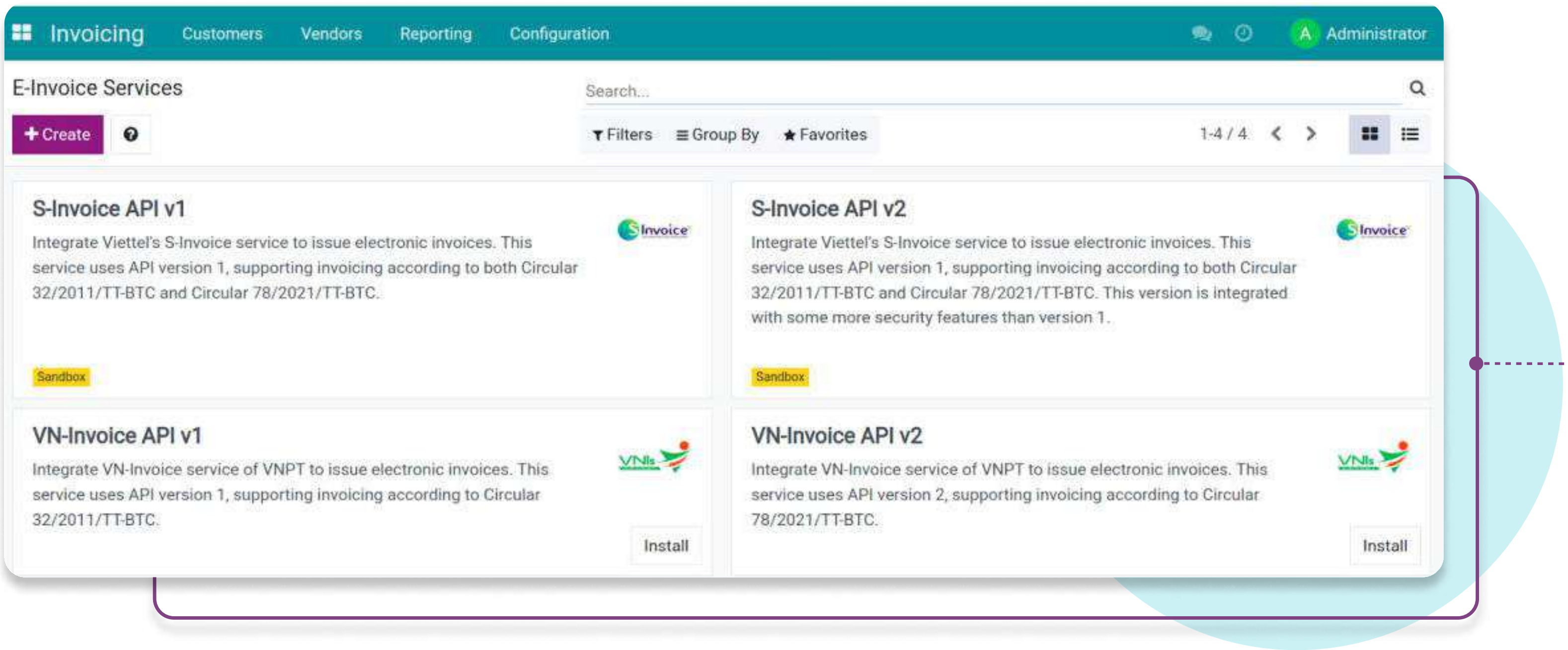
Integrate E-Invoice service



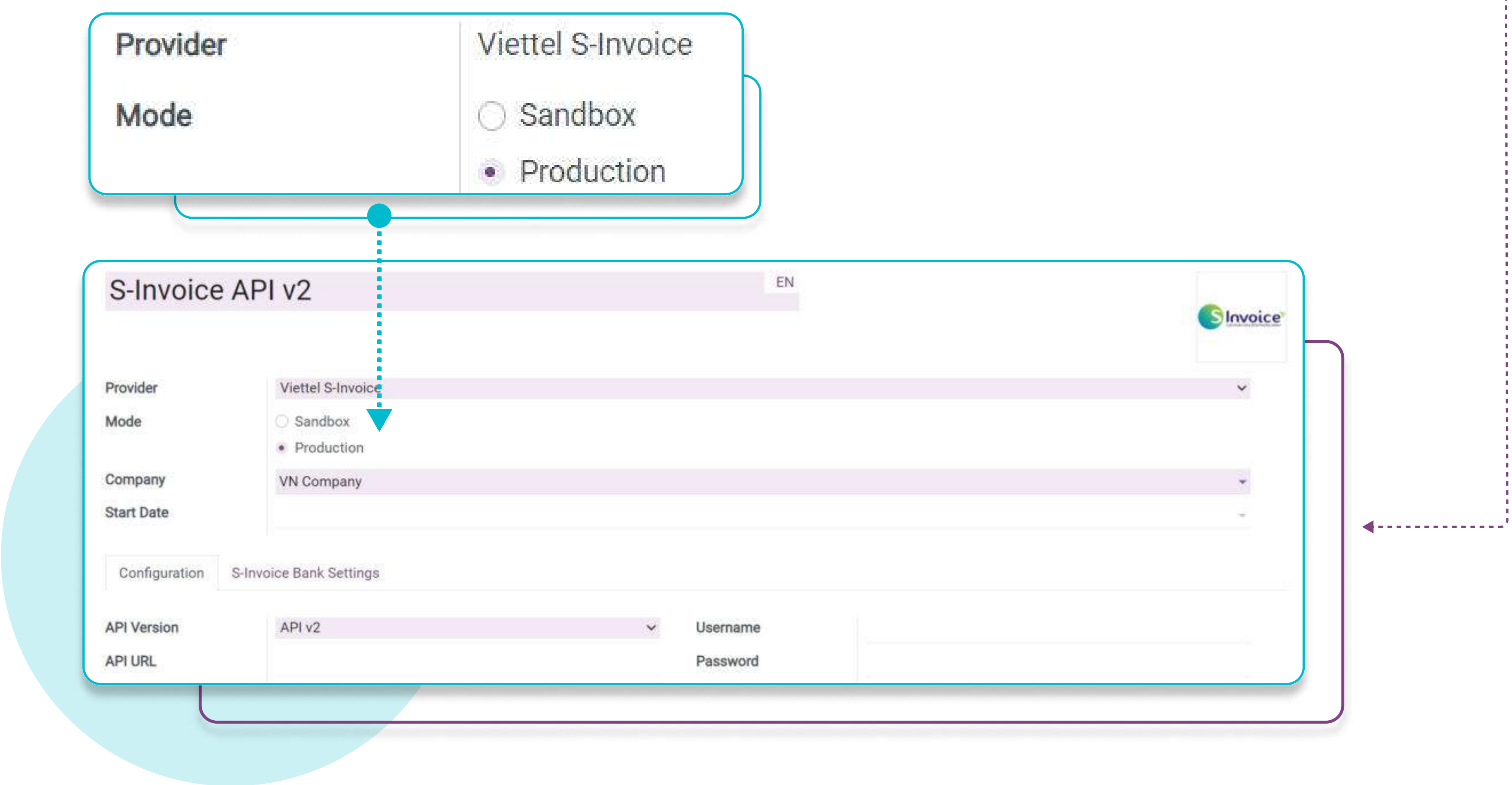
***Step 1**: Enable E-invoice service*

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.

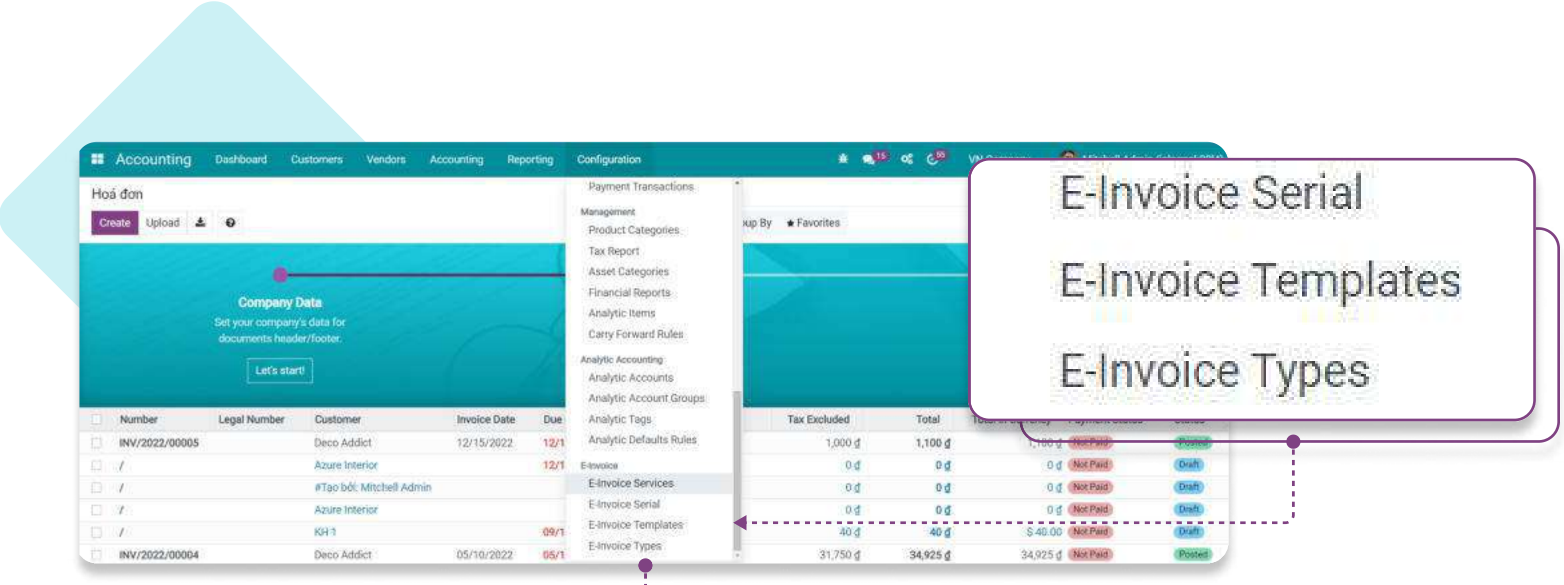


Select the **Production** mode, add the service information for the *API URL, Username*, and *Password fields*. This information will be provided either by S-Invoice or VN-Invoice when you register with any of them.



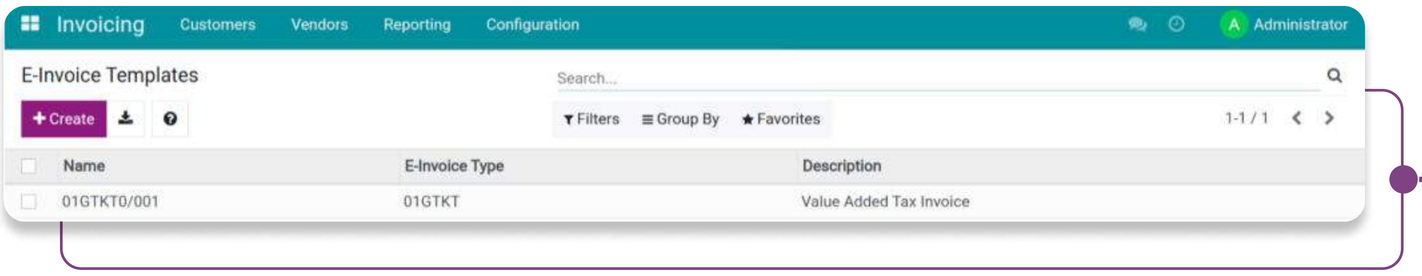
Step 2: Declare E-Invoice service information

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



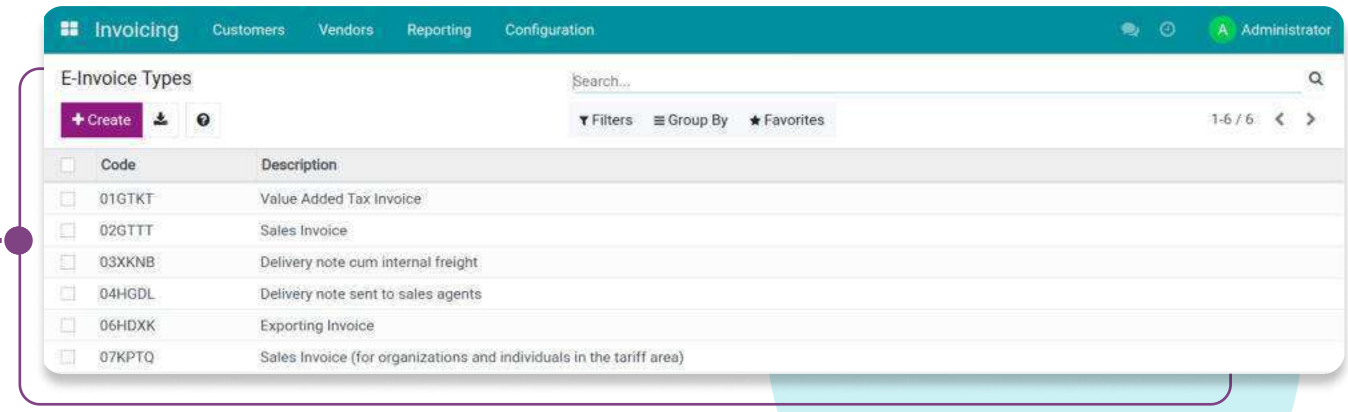
Declare E-Invoice Templates

Viindoo has the 01GTKT0/001 template available by default. To use another template, click **Create** to add the template that the company registers with the tax authority.



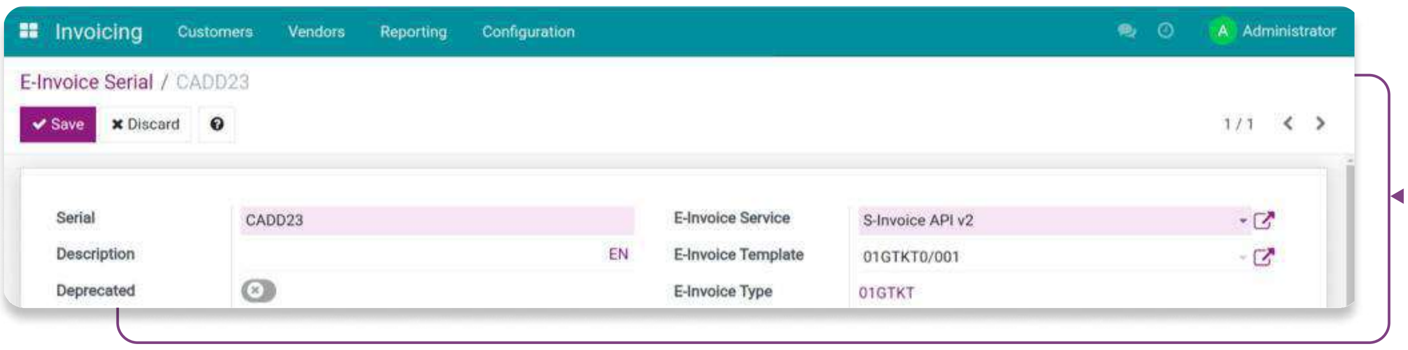
Declare E-Invoice Types

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



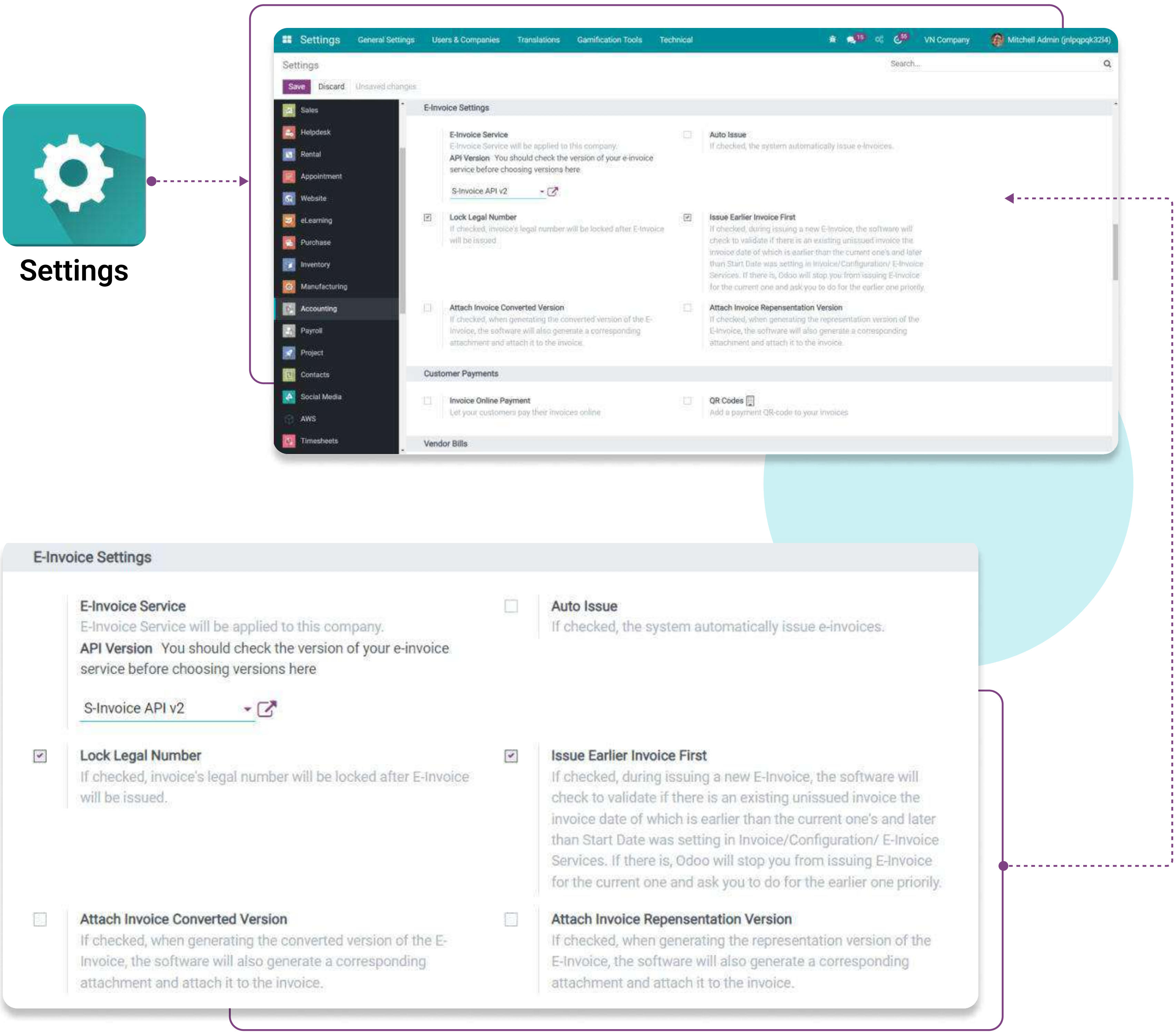
Declare E-Invoice Serial

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.*

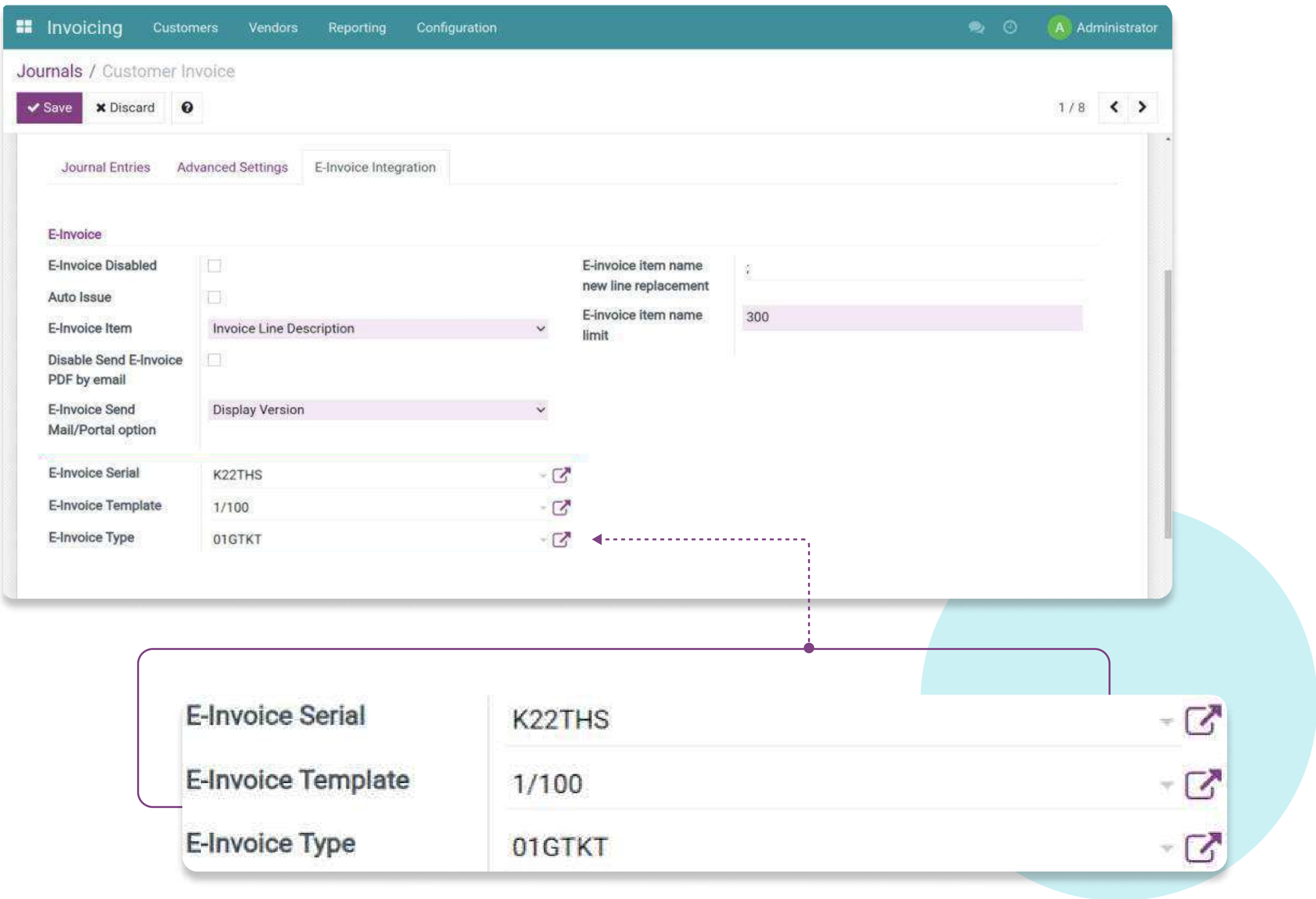


Enable features according to your needs, such as:

- *Auto Issue.*
- *Lock Legal Number.*
- *Issue Earlier Invoice First.*
- *Attach Invoice Converted Version.*
- *Attach Invoice Representation Version.*

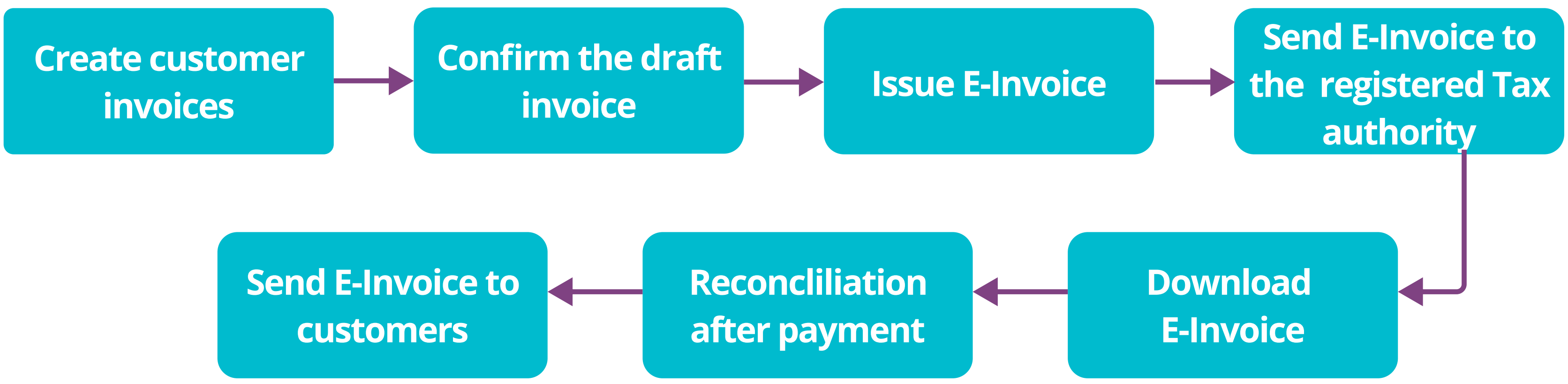
Step 4: *Configure information on Customer Invoice Journal*

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.



- *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

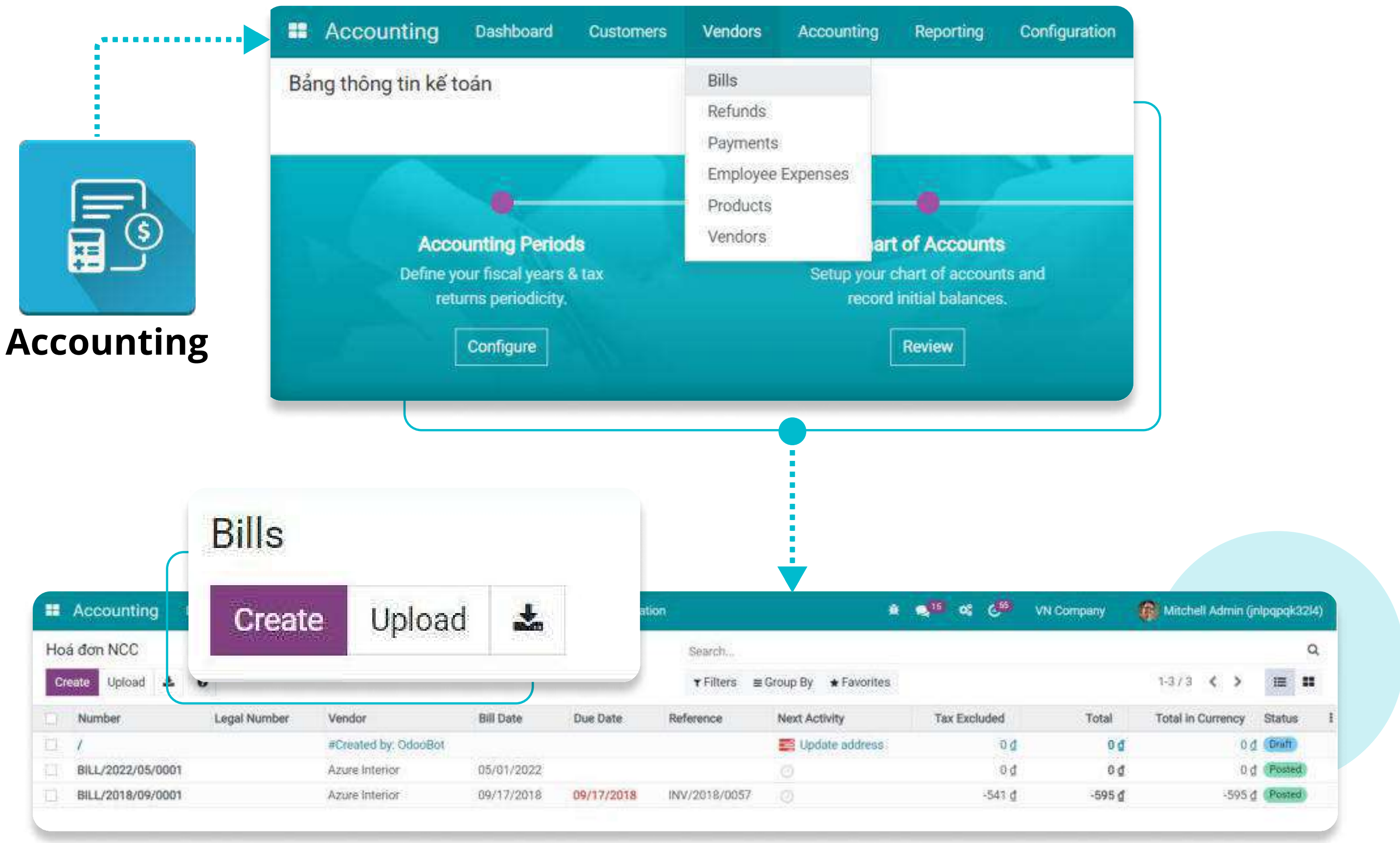


➡ See details at:

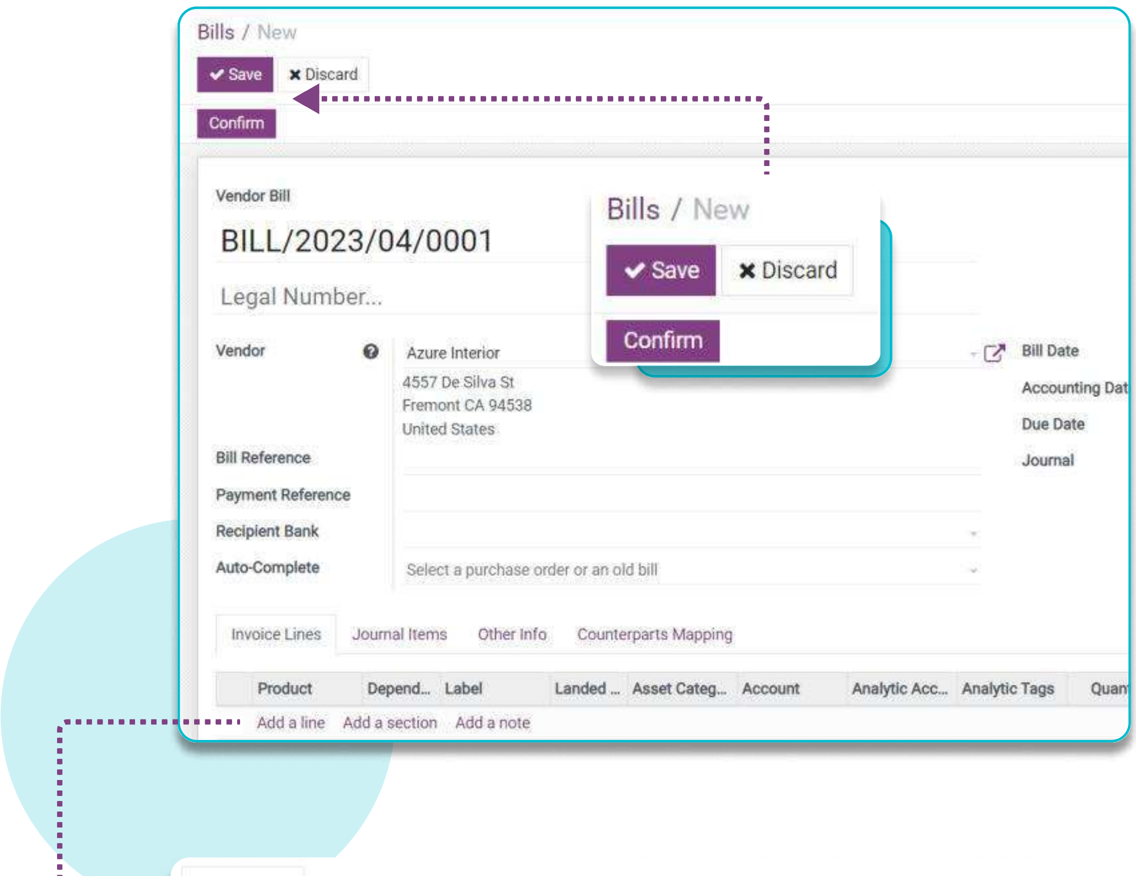
- *Issue e-invoice by integrating Viindoo with Viettel's S-Invoice service.*
- *Issue e-invoice by integrating Viindoo with VN-Invoice service.*

Vendor Bills

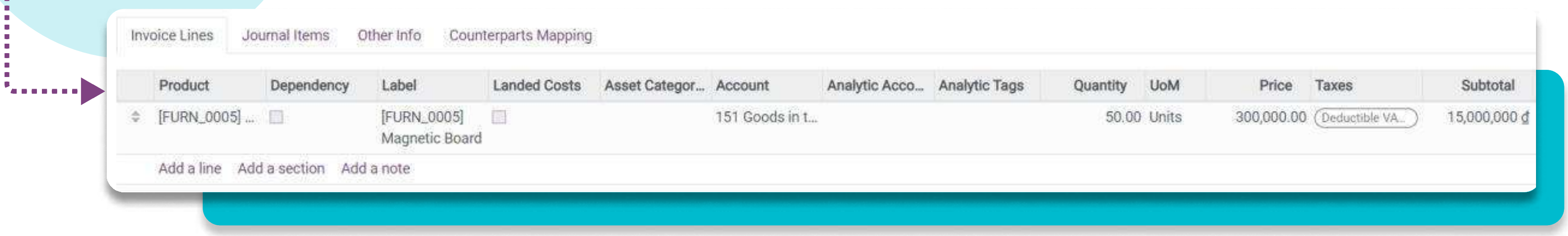
Similar to the customer invoices, you also have 02 methods to create vendor bills: create directly from a purchase order or navigate to **Invoicing ‣ Vendors ‣ Bills,** click **Create.**



A detailed bill interface will be displayed, add the necessary information such as Legal Number, Vendor, Bill Date, Accounting Date, Due Date.



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

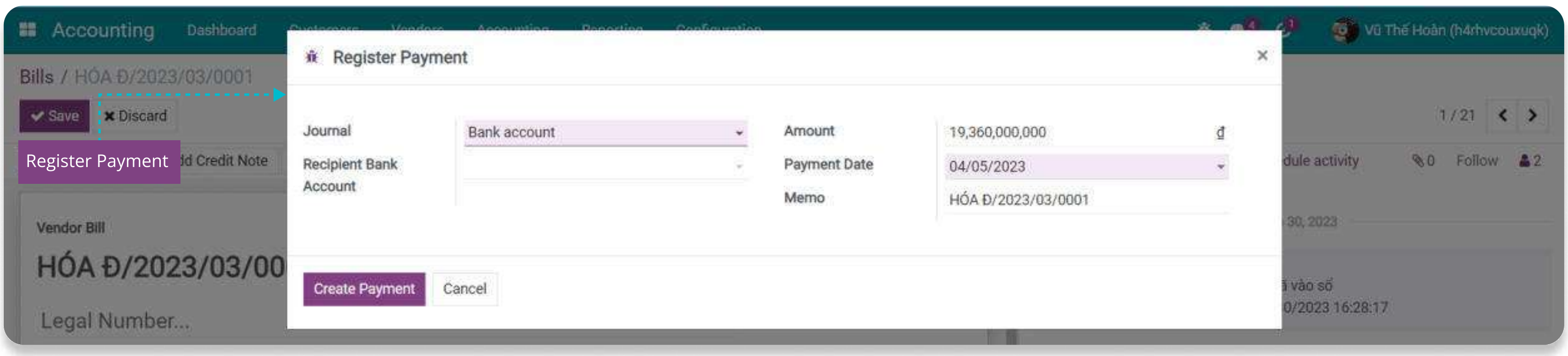


Click **Add a line** to choose product, quantity and price.

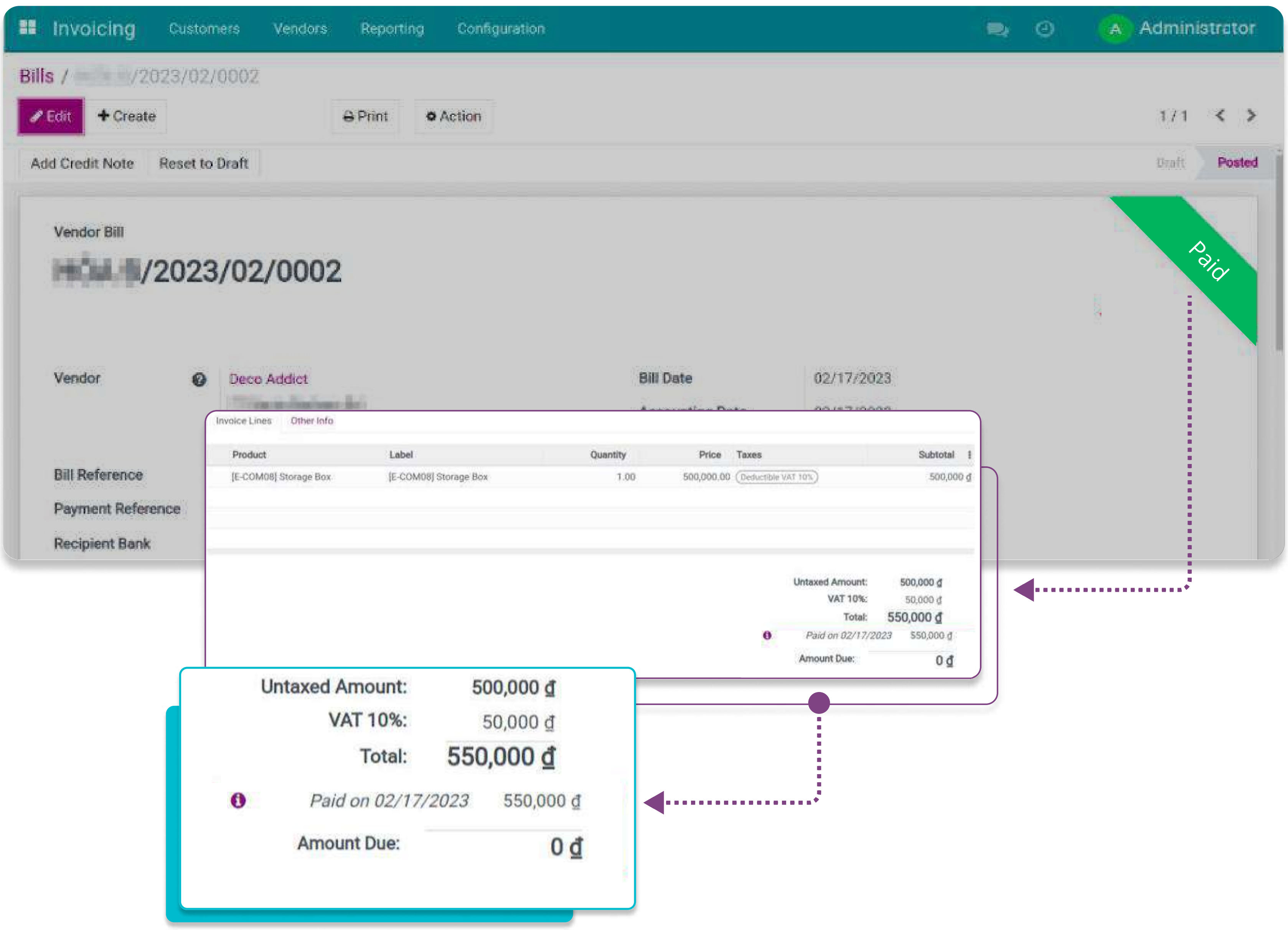
REGISTER PAYMENT

To register payments in Viindoo, do as follows:

Step 1: When a vendor bill is confirmed, the **Register Payment** button will be displayed. Add the value of the bill to the **Amount** field and click **Create Payment** button to register the customer's payment.

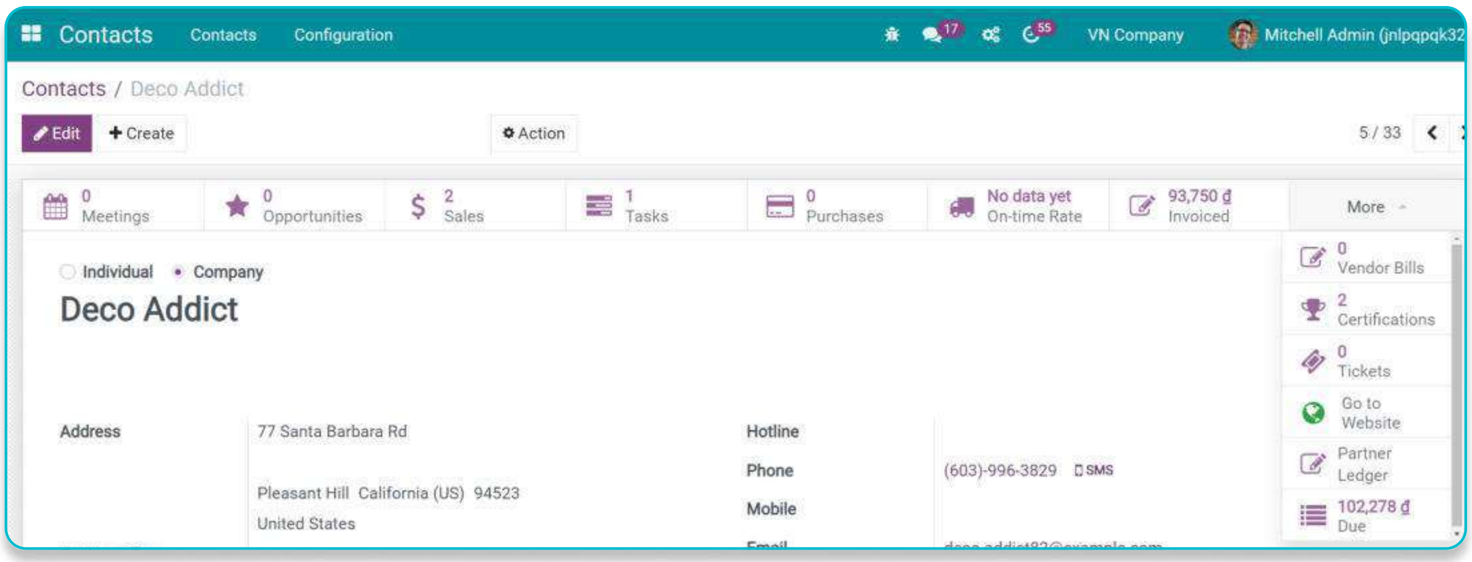


Step 2: Going back to the invoice, you will see the above payment reconciled directly to the invoice.



ACCOUNTING LIABILITIES MANAGEMENT

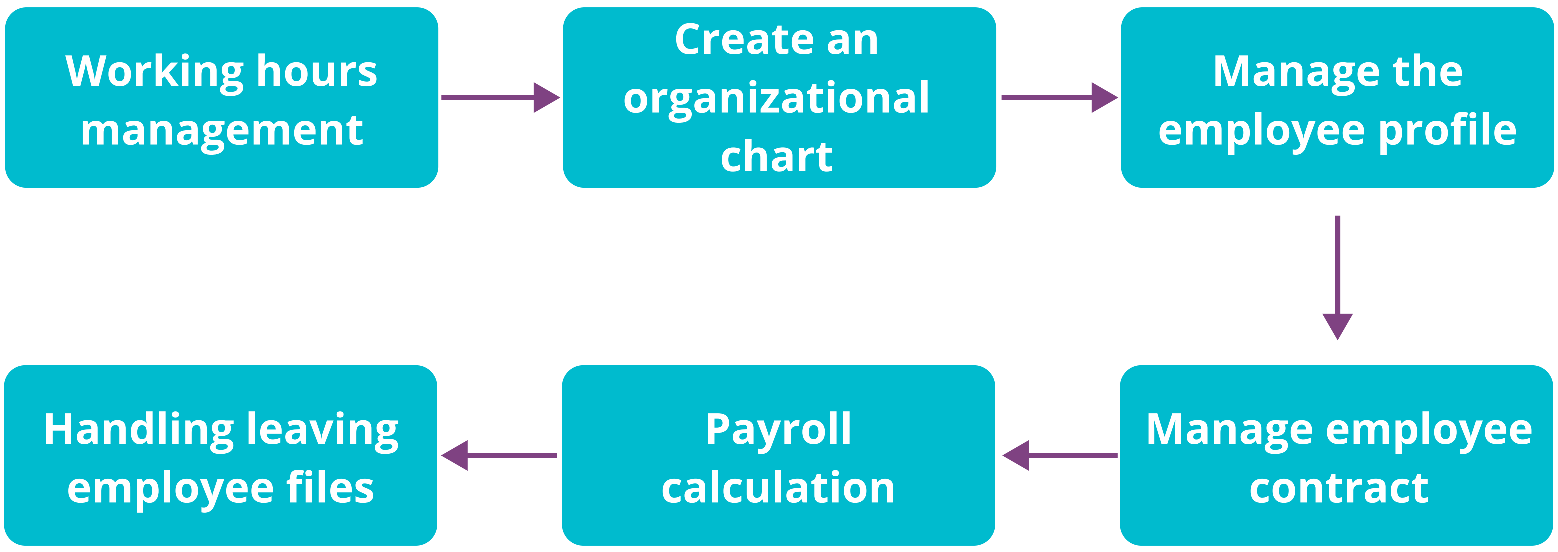
On a customer or a vendor contact, you can see their invoices and liabilities.



- *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.
- 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 ₫	0 ₫	0 ₫	19,360,000,000 ₫	0 ₫	19,360,000,000 ₫
2023-03-30 ▾	HÓA Đ	331	1331, 151	HÓA Đ/2023/03/0001		0 ₫	0 ₫	0 ₫	19,360,000,000 ₫	0 ₫	19,360,000,000 ₫
▸ Phan Văn Đoàn						165,000,000 ₫	0 ₫	0 ₫	0 ₫	165,000,000 ₫	0 ₫
Total						165,000,000 ₫	0 ₫	0 ₫	19,360,000,000 ₫	165,000,000 ₫	19,360,000,000 ₫

HR Payroll Management



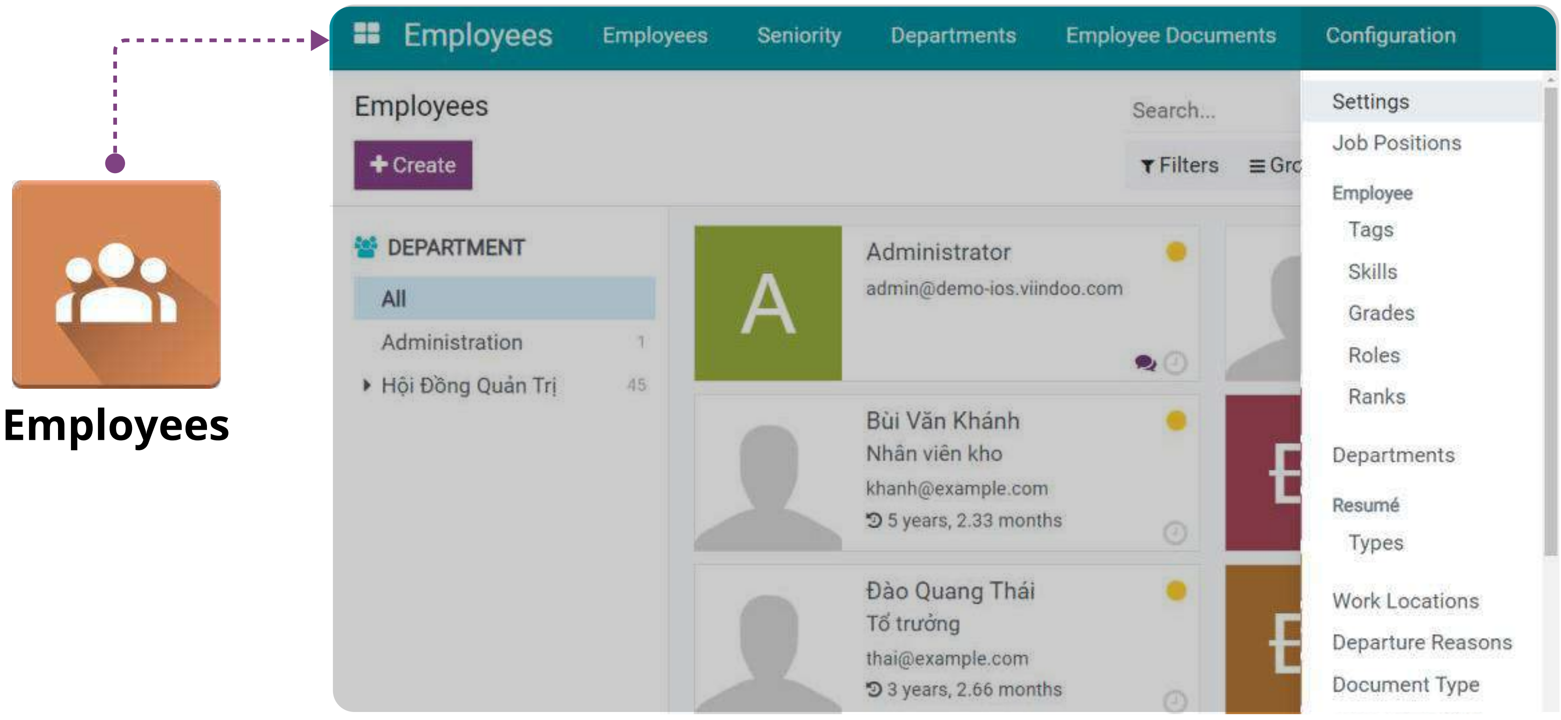
➡ *Check out Viindoo's suggestions for HP payroll management by job positions in Appendix: HR payroll management - (Page 142.*

WORKING HOURS MANAGEMENT

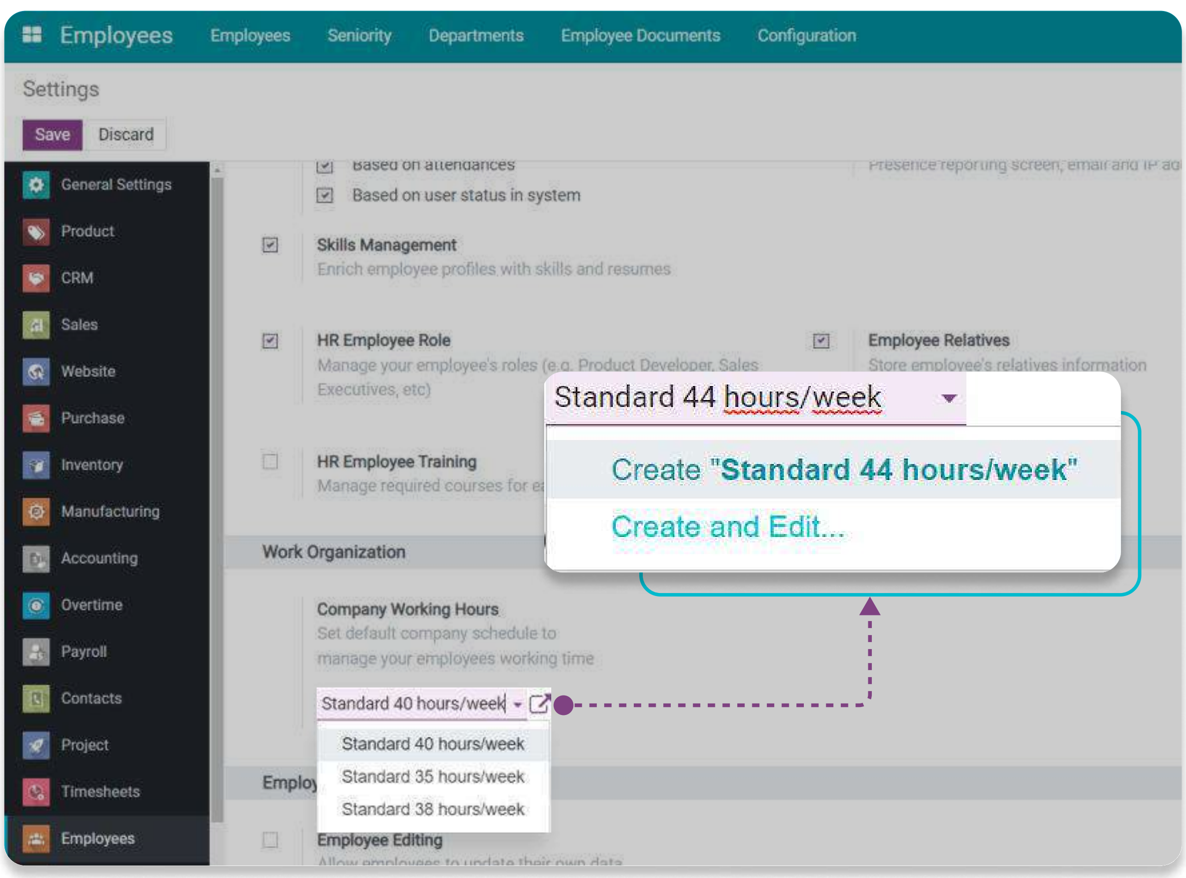
Working hours can be applied to the entire company or a specific group of employees. By default, the software provides three main working hours:

- Standard 40 hours/week;
- Standard 38 hours/week;
- Standard 35 hours/week.

To apply the working hours for the whole company, navigate to **Employees ‣ Configuration ‣ Settings**.

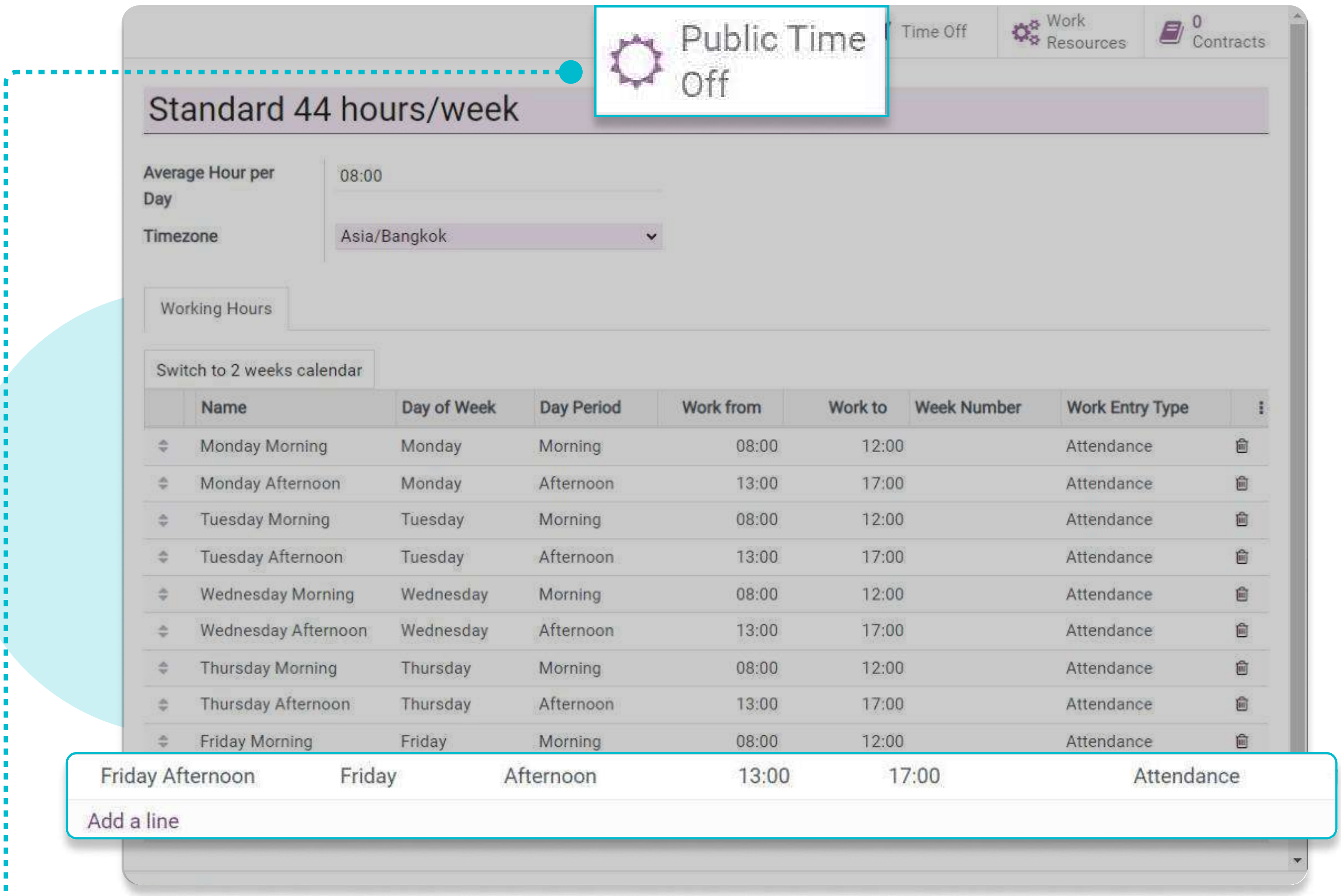


The default working hours are Standard 40 hours/week, but you can choose another one suitable to your business's actual schedule.

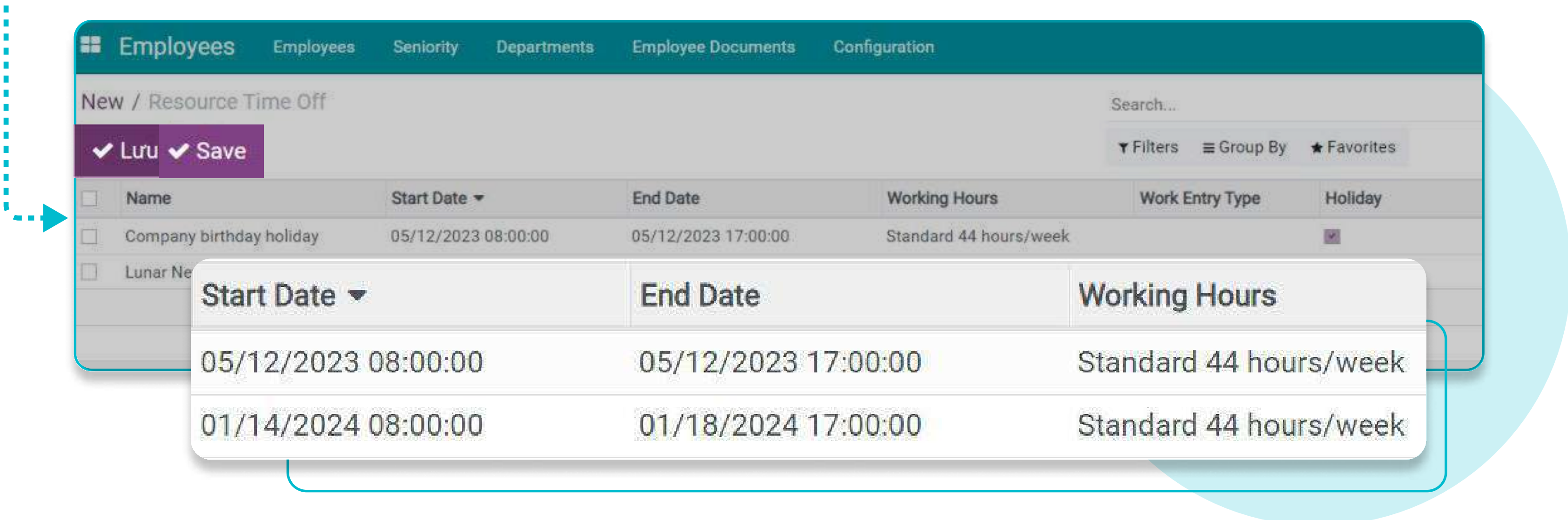


Or you can create a new one by entering the name of the working hours and selecting **Create and Edit.**

Then, adjust the information for the new working hours accordingly.



Press **Add a line** to enter more working periods, such as Name, Day of the week, Day period, Work from, and Work to.



To define holidays or anniversary information for your company, go to the **Public Time Off** right at the interface, press **Create**, mark the Start Date and End Date:

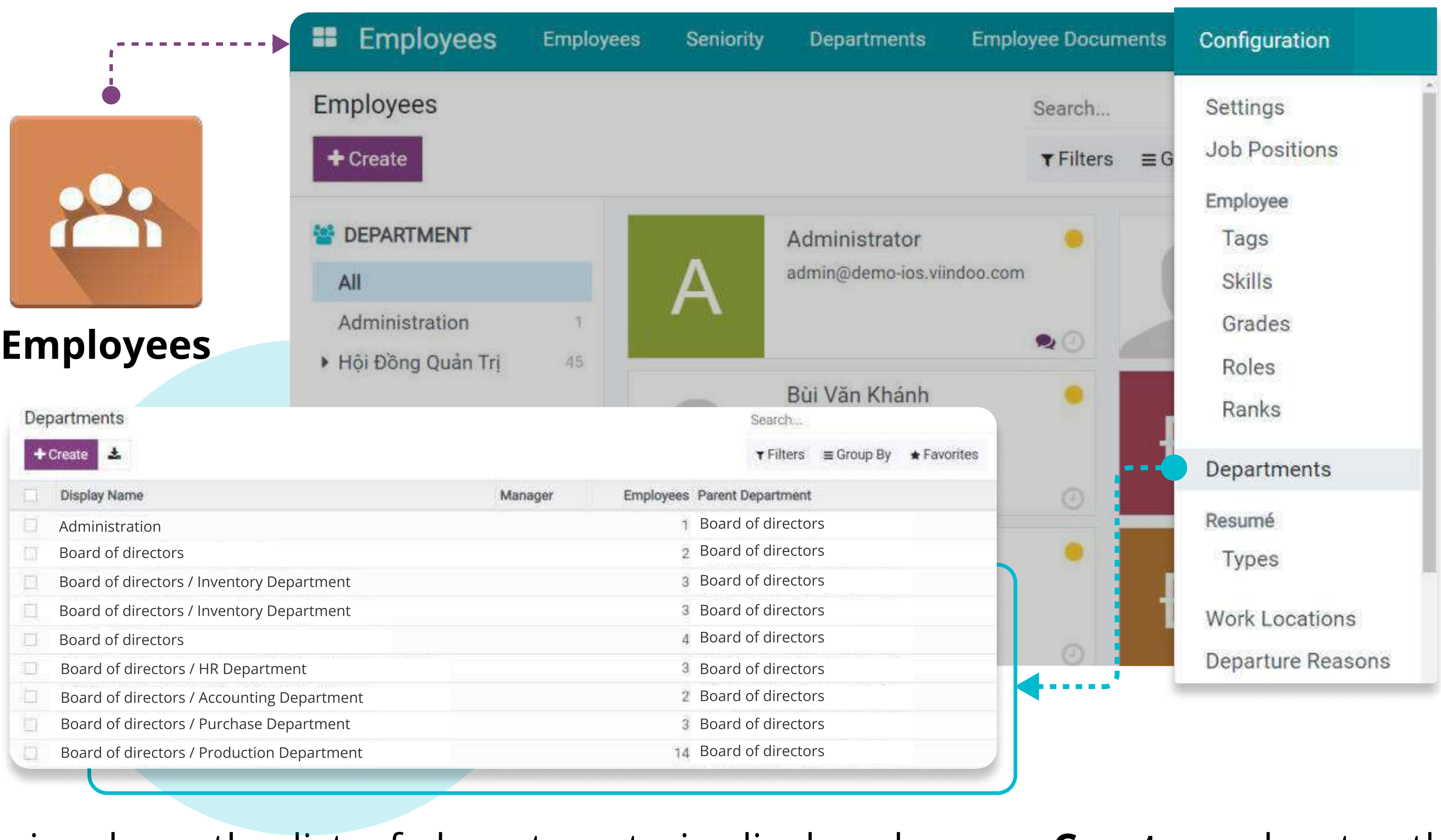
Press **Save** to finish.

CREATE AN ORGANIZATIONAL CHART

Create a chart of departments

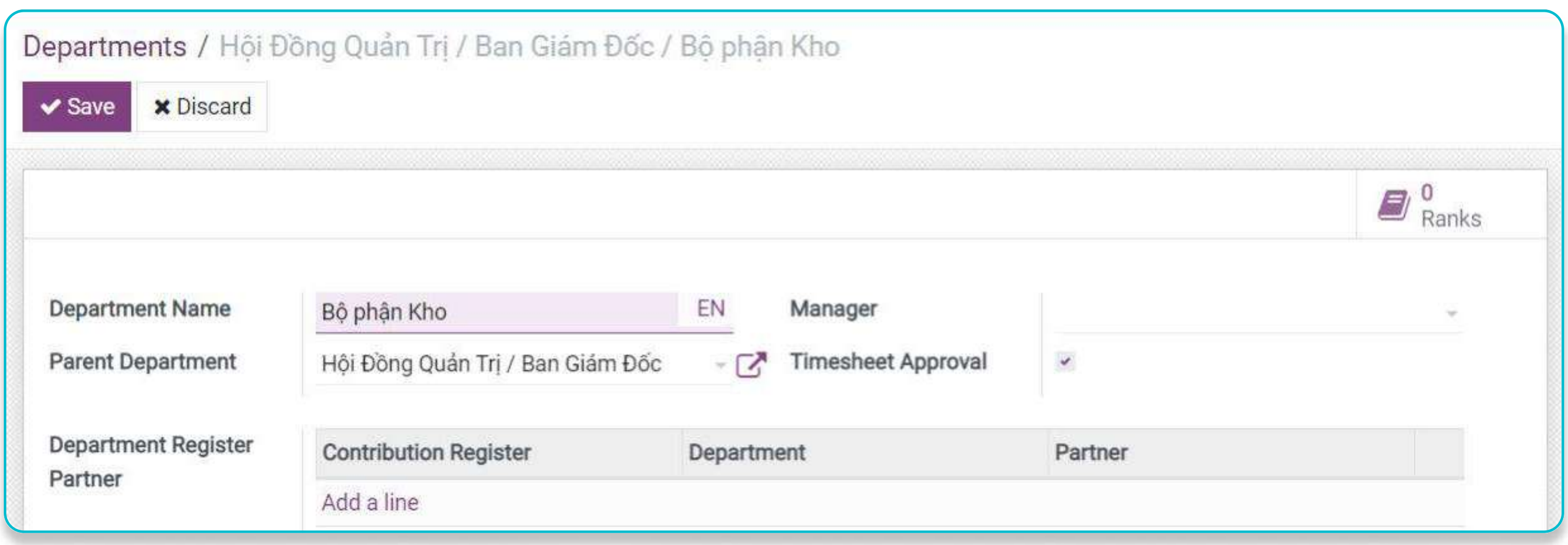
The Viindoo enterprise management software allows you to create departments flexibly, suitable for many different organizational structures, with no limitation on the quantity or levels of departments, which facilitates effective work planning and management.

To create a new department, navigate to **Employees ‣ Configuration ‣ Departments.**



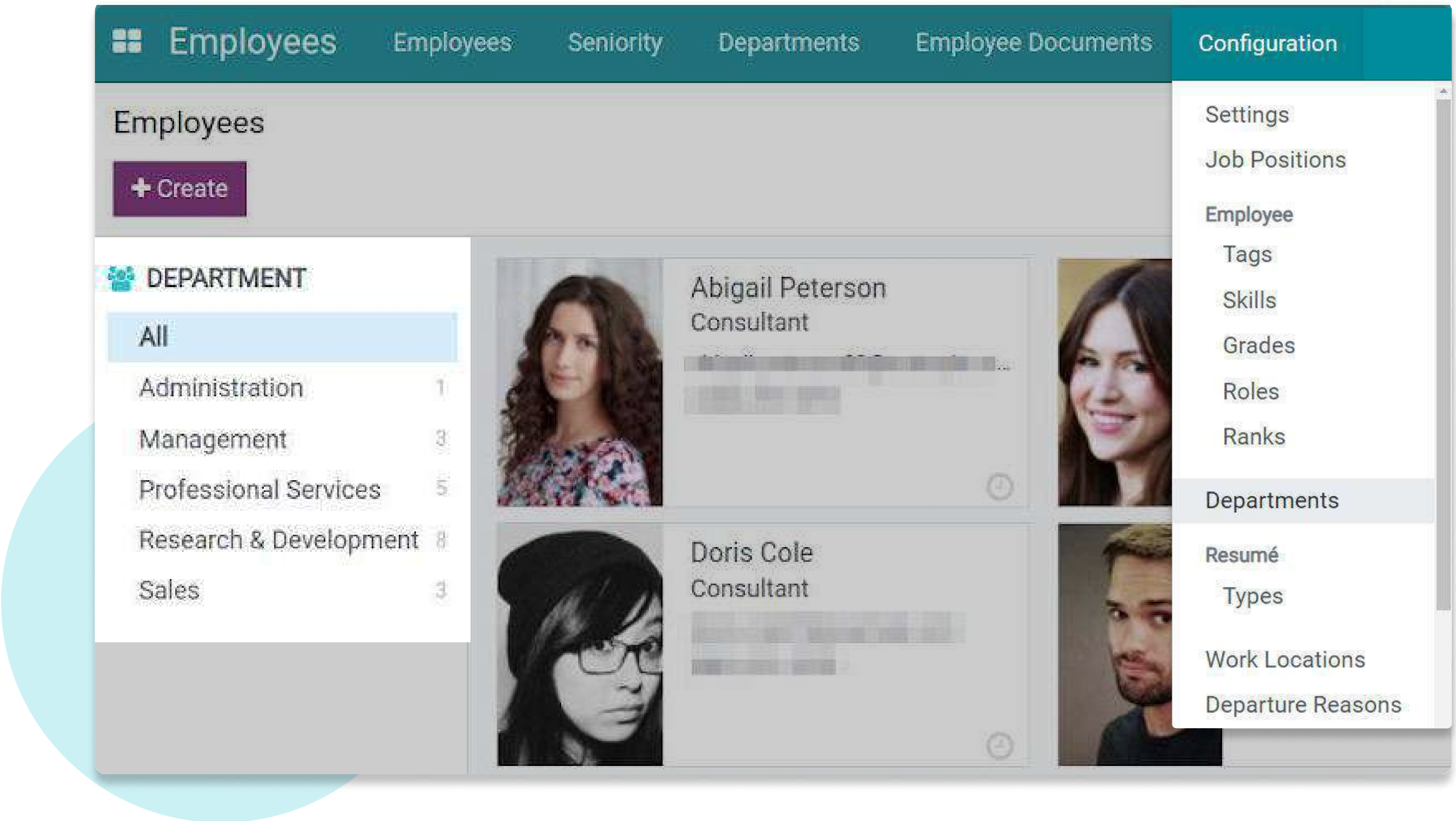
This is where the list of departments is displayed, press **Create** and enter the following information:

- *Department Name:* Enter the department's name.
- *Parent Department:* Select the parent department that is the closest to the department you want to create.
- *Manager:* Select the department manager from the list of employees.



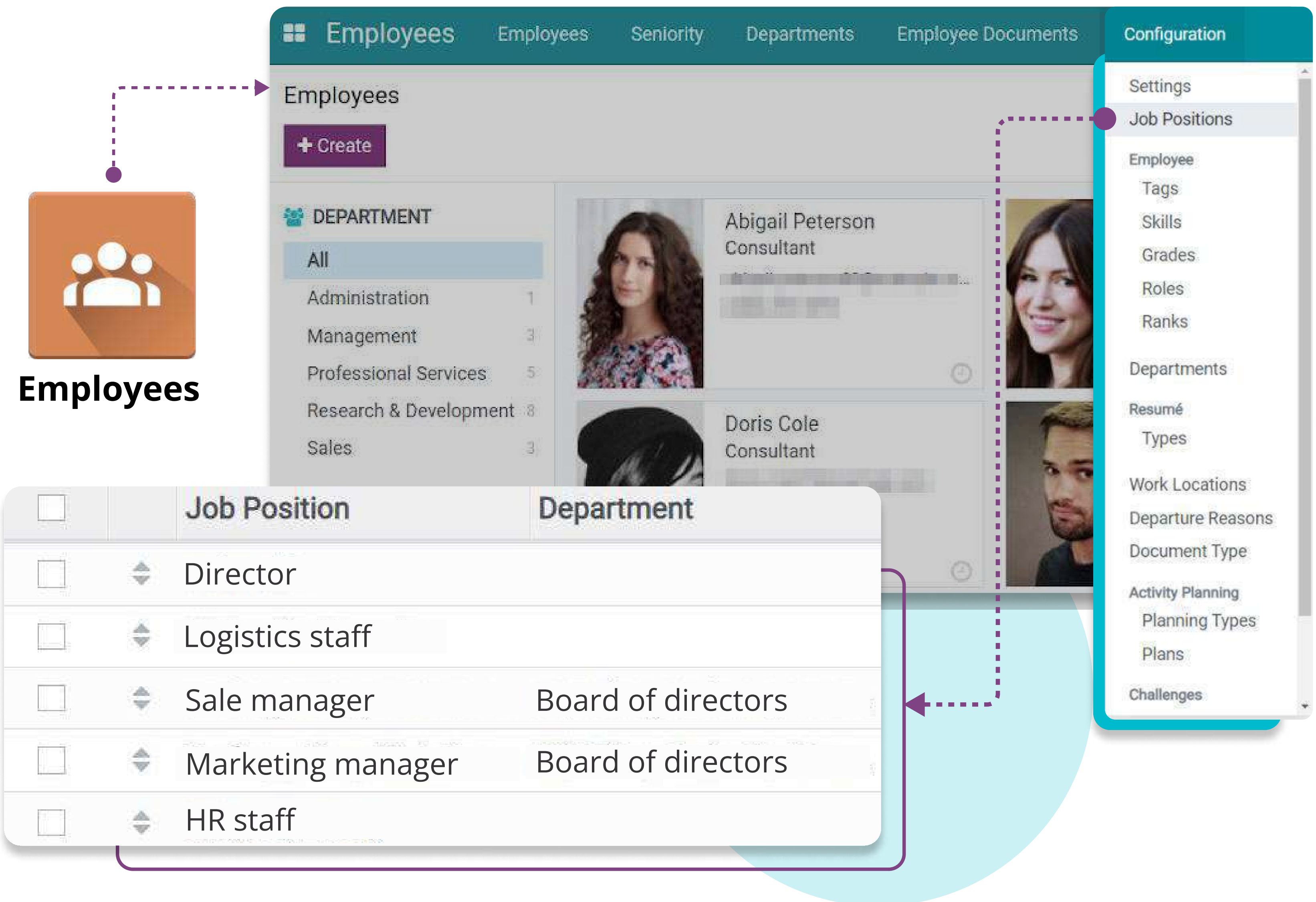
After setting the above information, press **Save.**

On the list of employees, you will see an organizational tree following the departmental levels that you have set up. You can click on each department to see its list of employees.



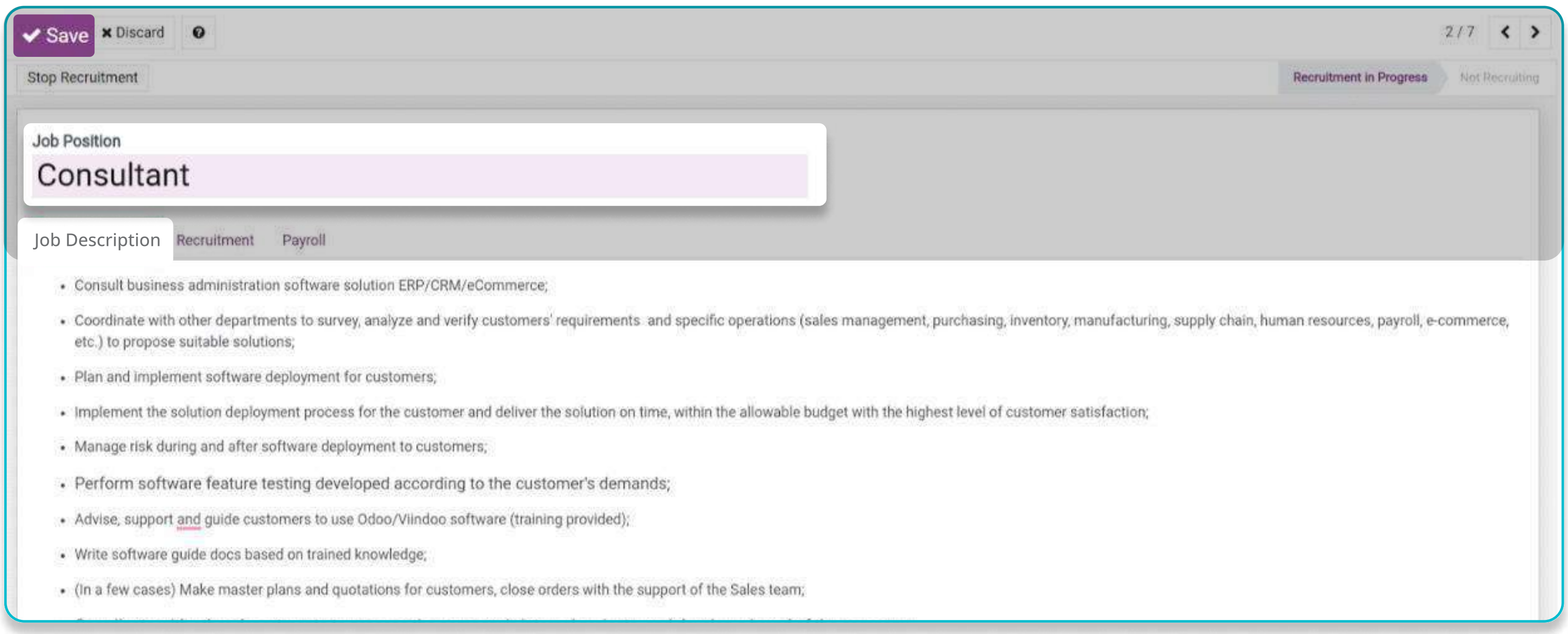
Manage job positions

To set up job positions, you navigate to **Employees ‣ Configuration ‣ Job Positions ‣ Create:**



On the **Job Positions** view, enter the following information:

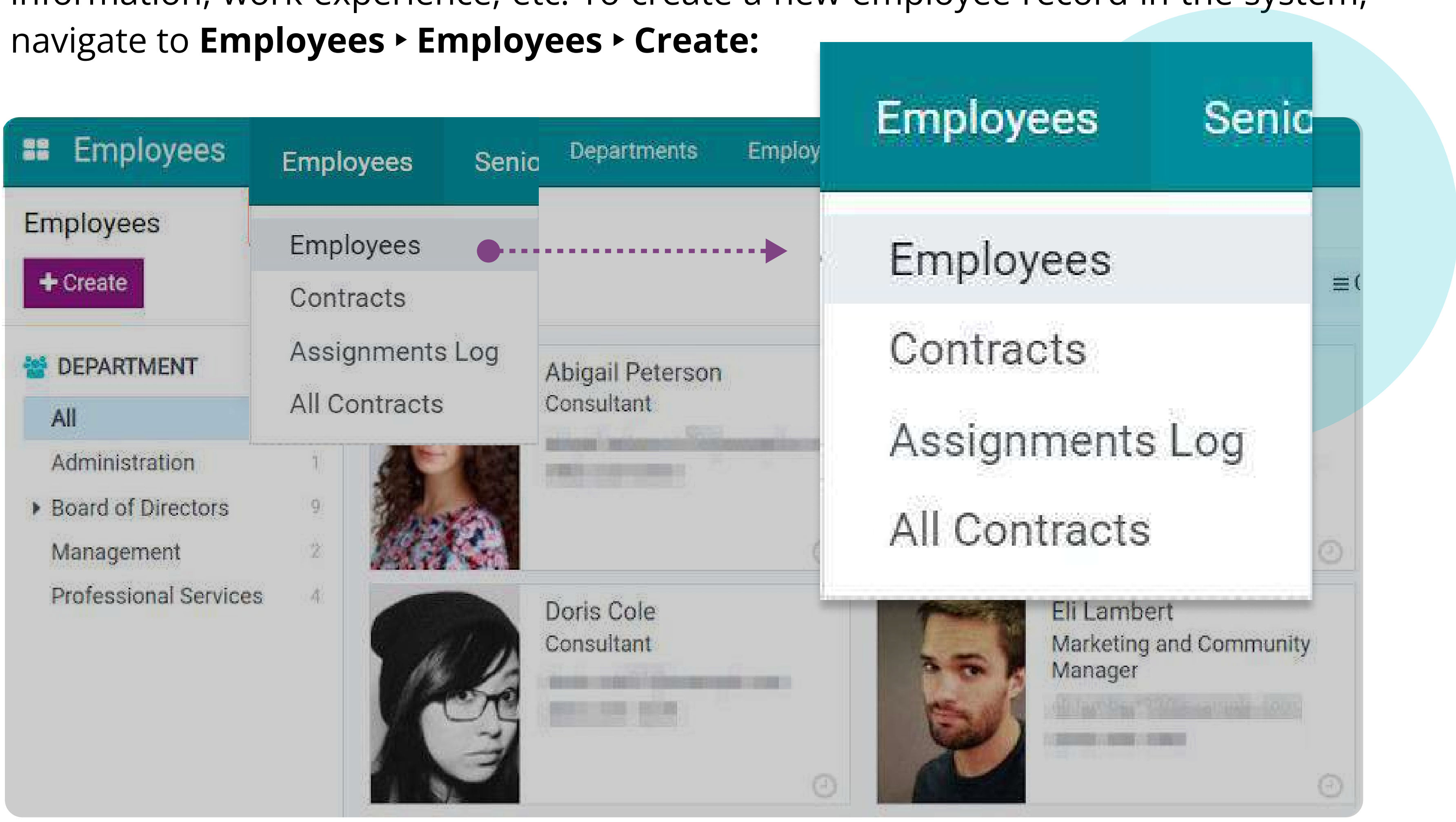
- *Job Position:* Name of position.
- *Job Description:* Enter a description of the job requirements, daily tasks to do, etc.

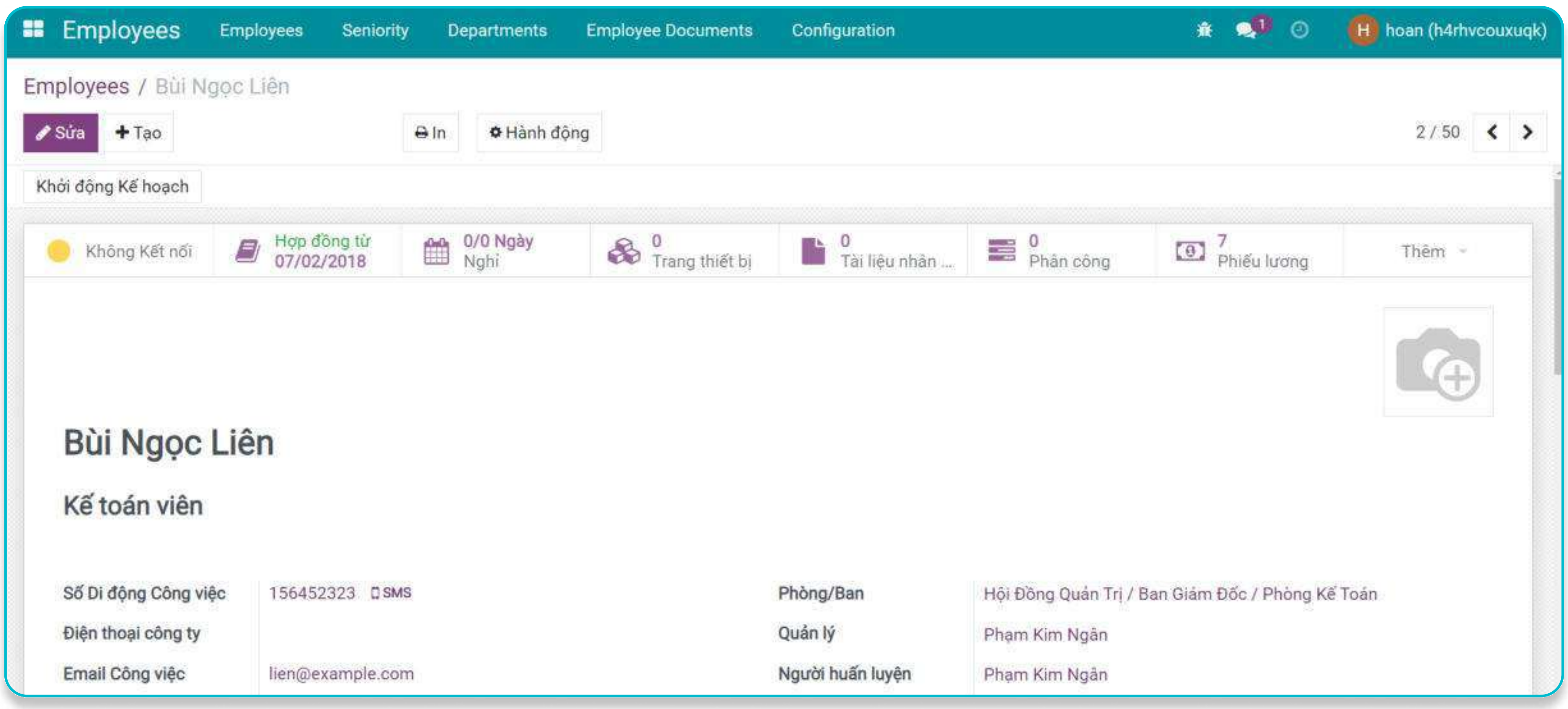


Then, press **Save** to finish.

MANAGE THE EMPLOYEE PROFILE

An employee record is a place to store all employee information, such as personal information, work experience, etc. To create a new employee record in the system, navigate to **Employees ‣ Employees ‣ Create:**

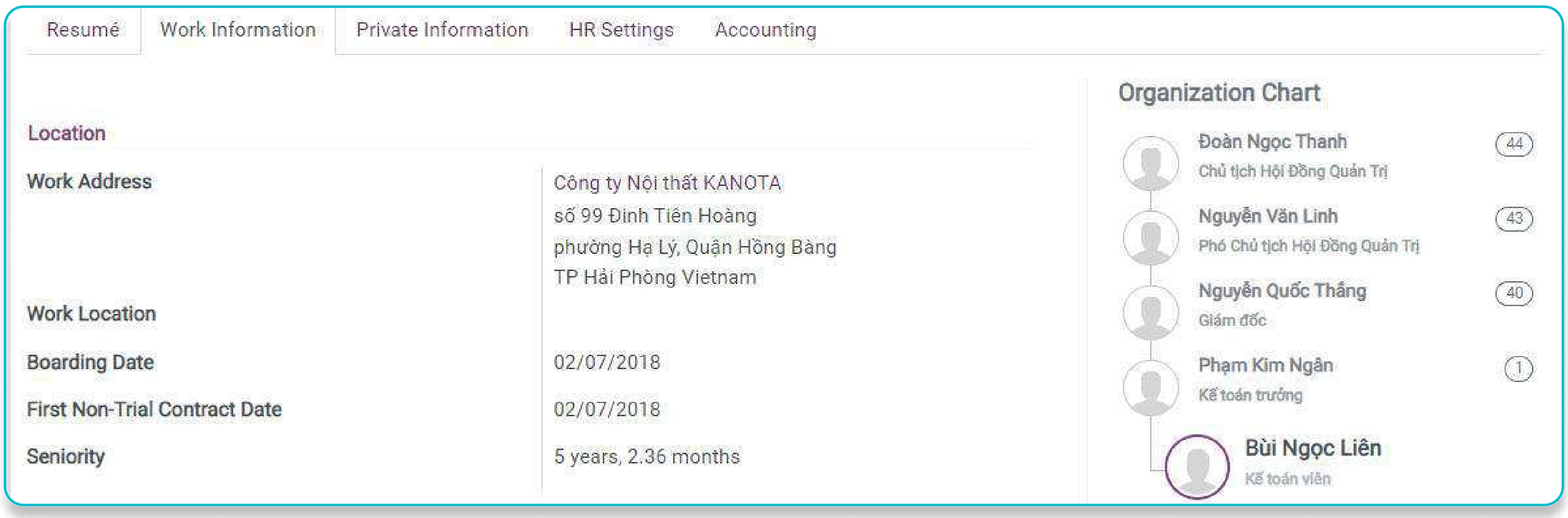




On the **Employee** view, enter the following necessary information:

- *Employee's Name:* Employee's first and last name.
- *Image:* You can upload photos of employees, which will make it easier to identify each other when communicating on the system.
- *Department:* Employee's department.
- *Manager:* The employee's manager is automatically suggested if you have set up the manager information on the *Department* view.
- *Coach:* By default, the direct manager will be displayed as the coach but you can choose another employee for the coaching task.

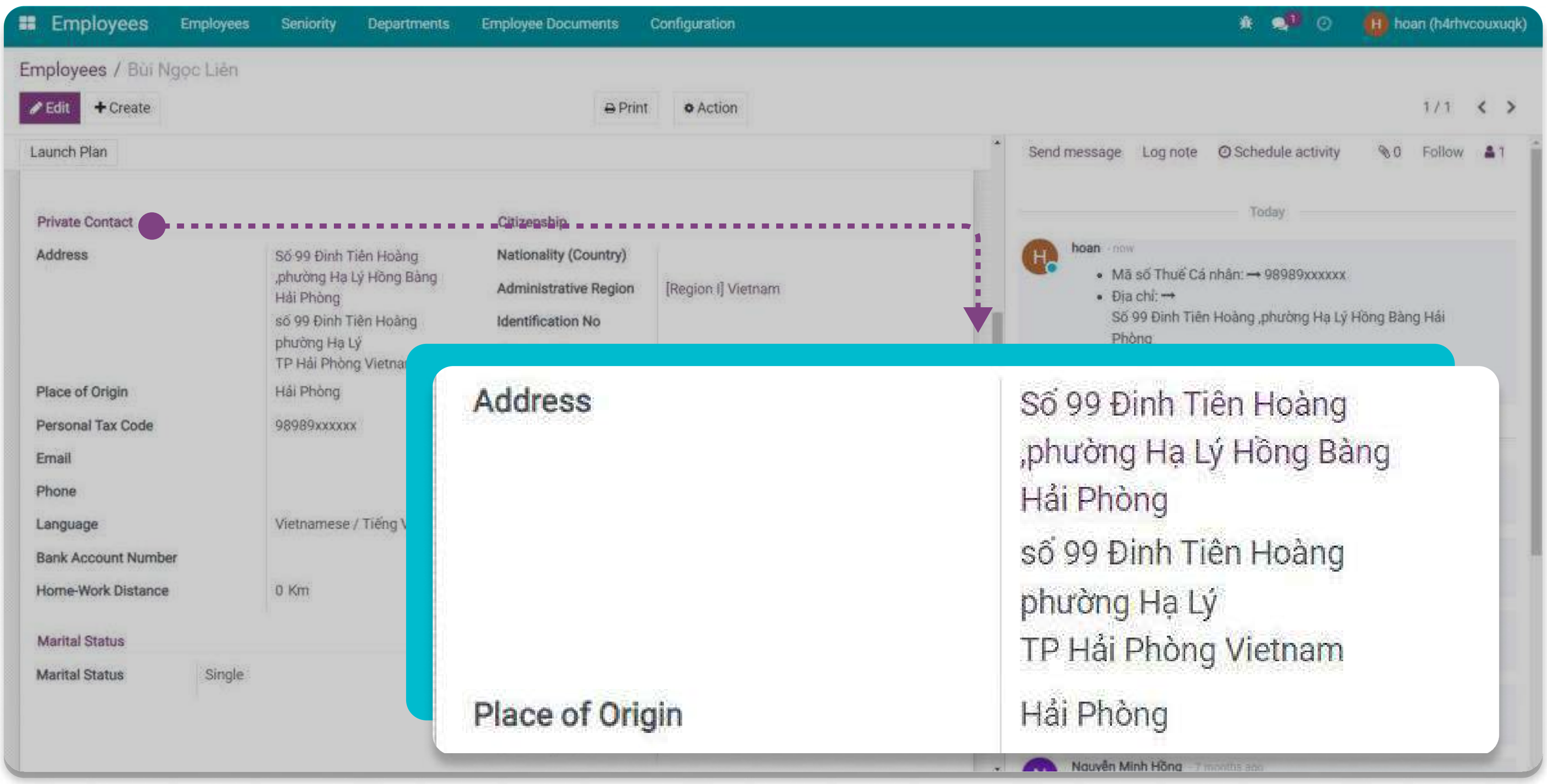
Work Information tab



- *Work Address:* The system will suggest the address of the company.
- *Work Location:* A place where employees work. For example, floor 6 or floor 10 of the company.
- *Organization Chart:* This shows the employee's position in the organizational structure following the genealogical structure.

Private Information tab

This is where the employee's private information is declared and stored.



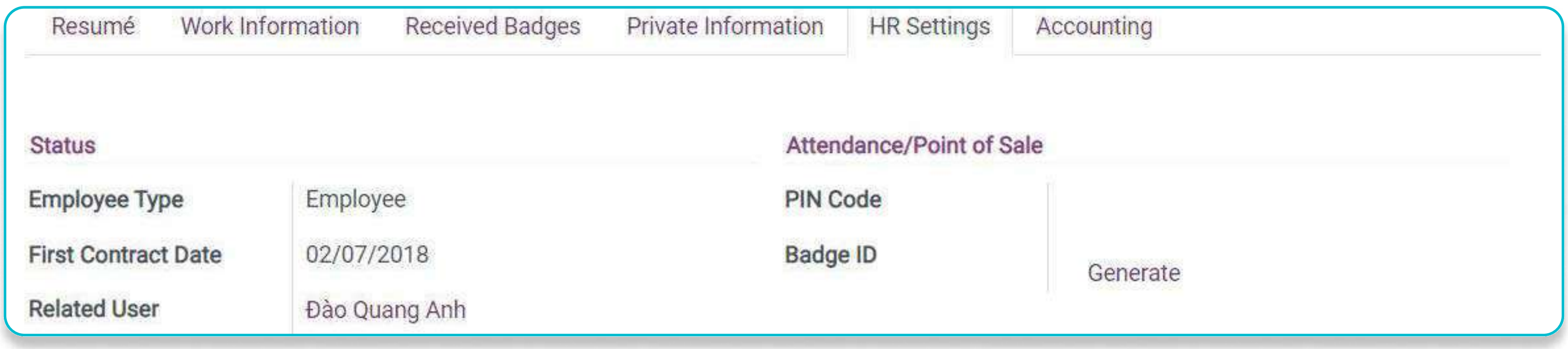
- *Address:* Enter the employee's private address.
- *Relatives:* In this tab, you need to declare the employee's relatives for the salary and Personal Income Taxes calculation later on.

Relatives

Relative Contact	Relation Type	Email	Phone	Mobile	Tax ID	Is Dependant
Bùi Đức Huy	Father	huybd@mail.com	+842862616139			☐
Add a line						

In addition, you should enter all other employee information so that you can track and search for it when you need it.

HR Settings tab



Here, you need to enter information about:

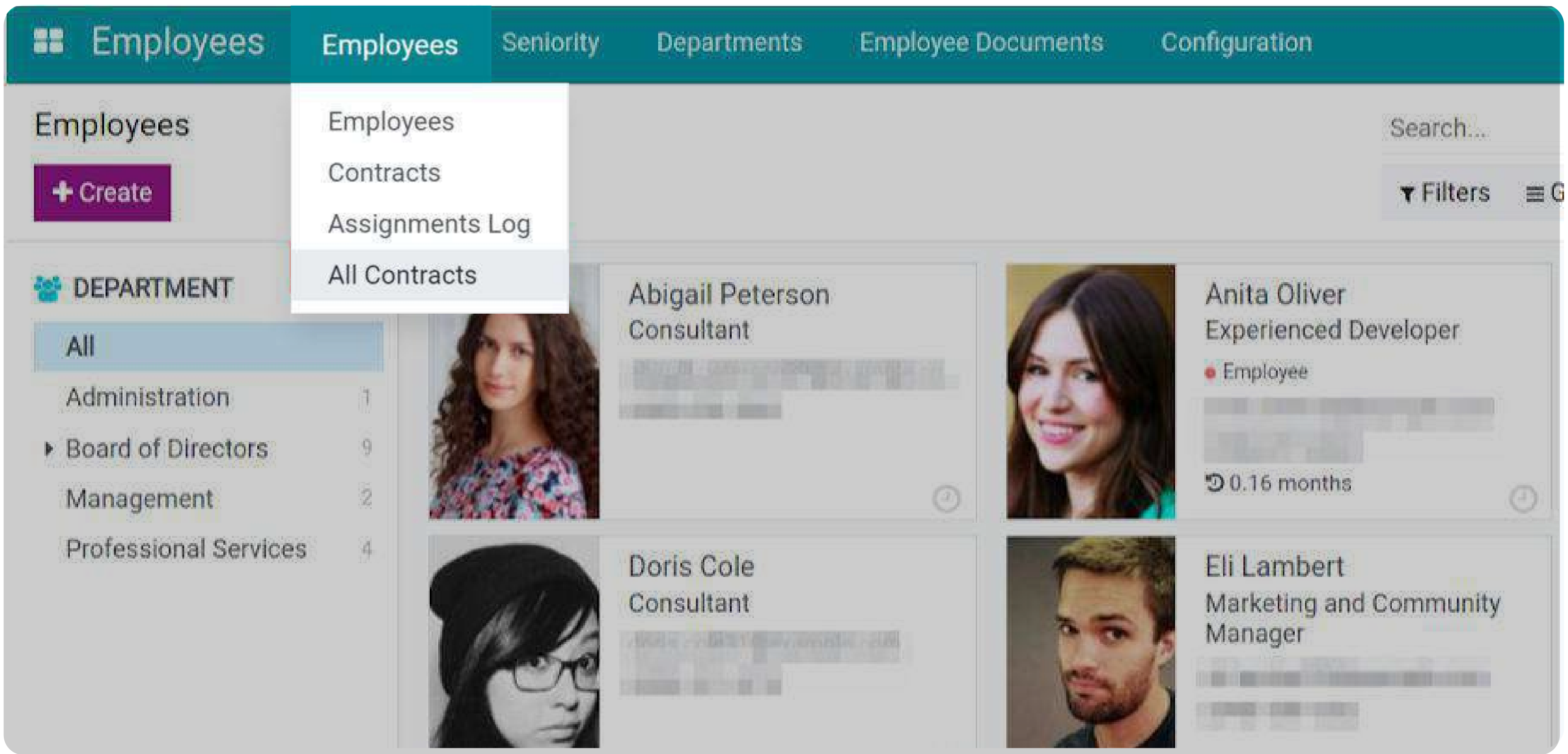
- *Related User:* To link the system user account (if any) to the employee.
- *Employee Type:* To categorize employees as full-time employees, interns, etc.

➡ See details at:

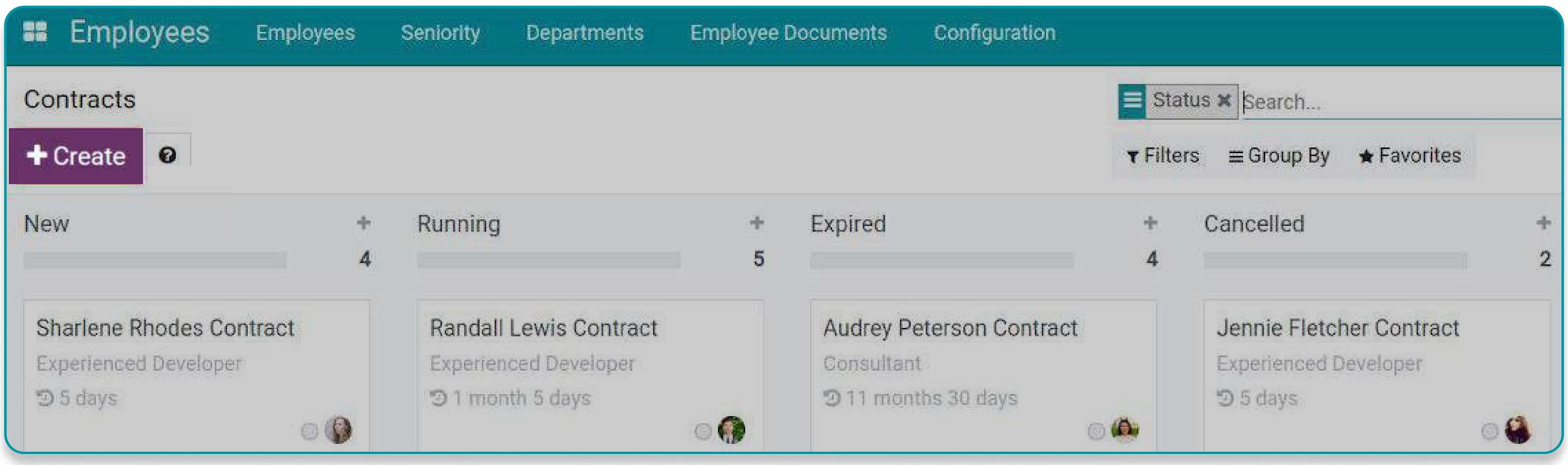
- *Create new employee.*

MANAGE EMPLOYEE CONTRACT

The internal contract in the Viindoo system is a place to store all the information to calculate the employee's salary, which has no legal value for the business and the employee. To create a new contract, navigate to **Employees ‣ Employees ‣ All Contracts.**

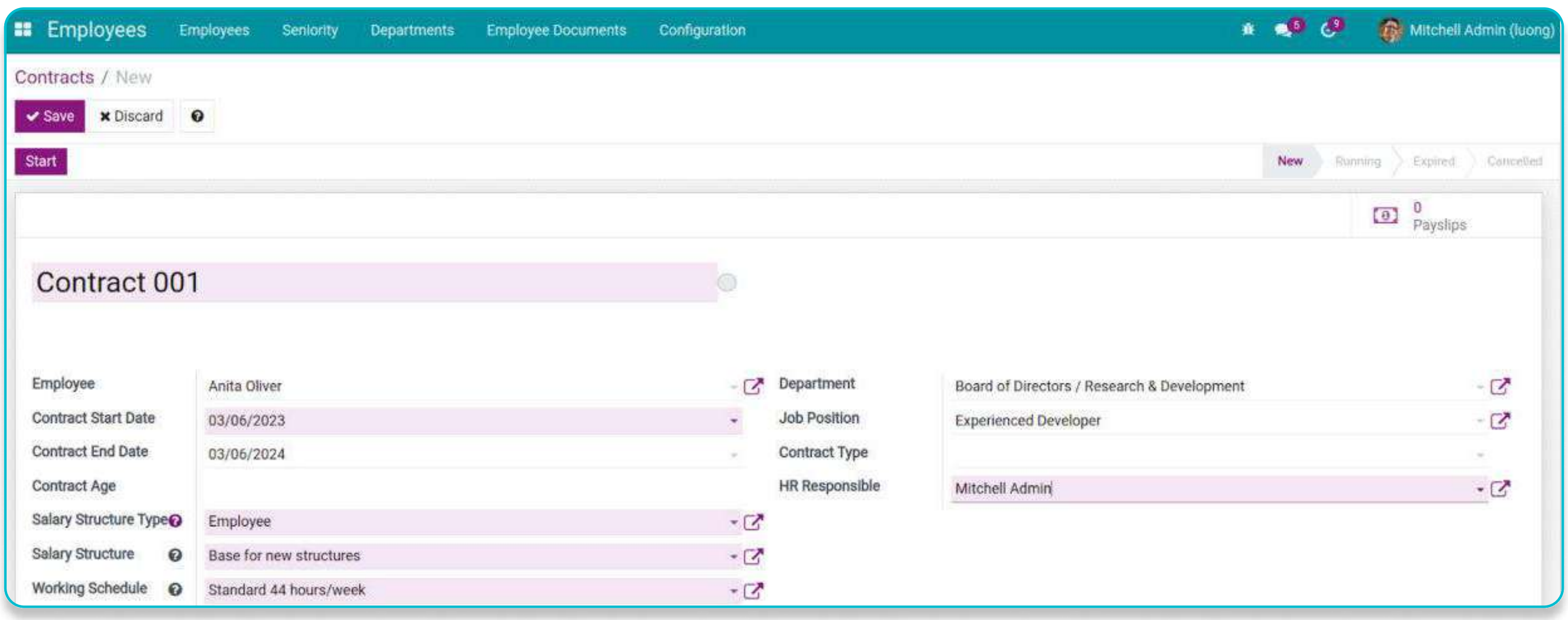


You will see a list of contracts grouped by status, press **Create.**



You enter the following information for the employee contract:

Basic information

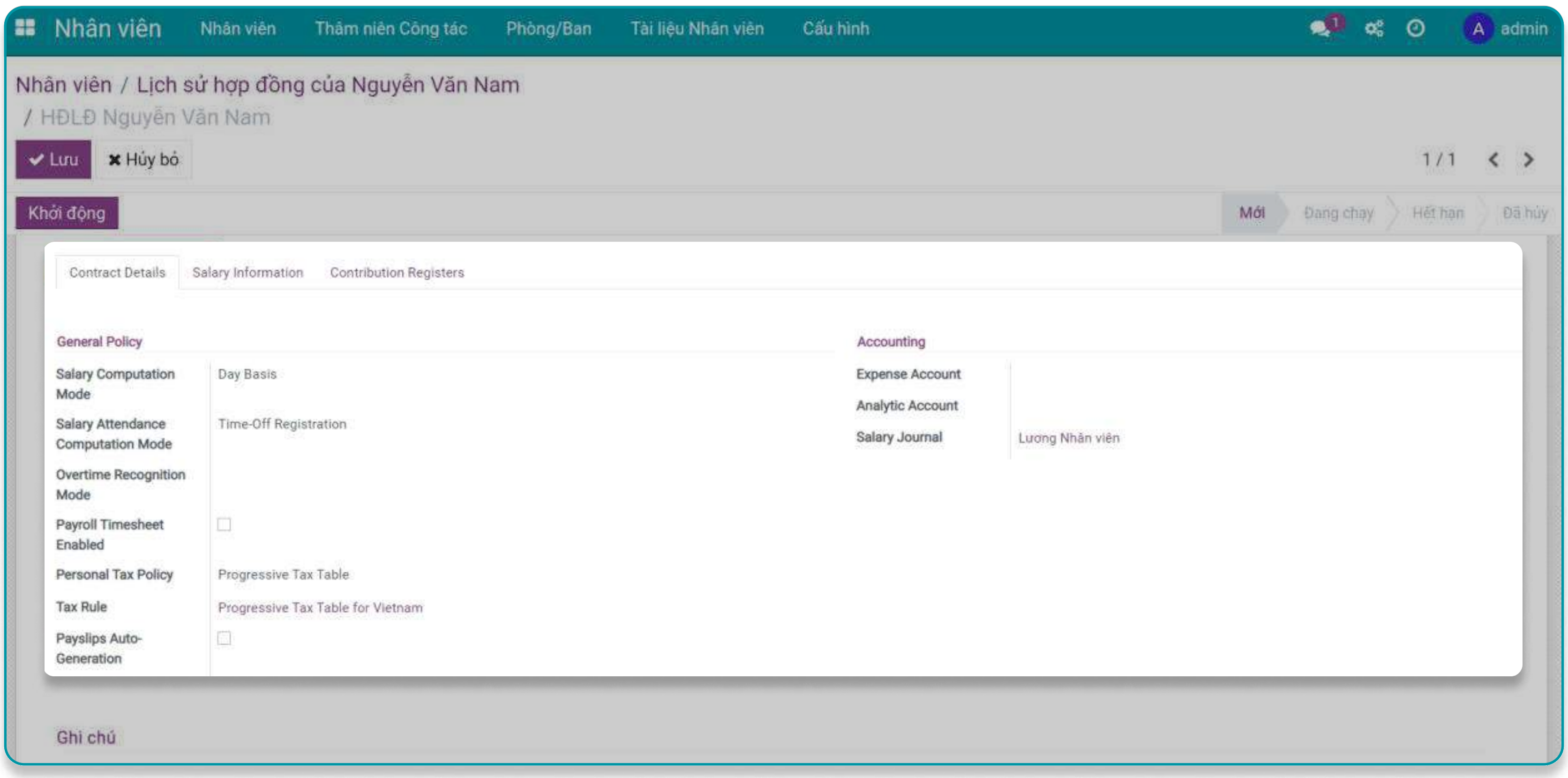


This is where the basic information on the contract is declared:

- *Employee:* Employee attached to this contract.
- *Contract Start Date/Contract End Date.*
- *Salary Structure:* Salary structure of employees.
- *Working Schedule*: Working hours of employees.
- *Department:* Display the department set up on the employee's profile by default.
- *Job Position:* Display the job position set up on the employee's profile by default.
- *Contract Type:* Contract type corresponding to this contract of the employee.

Contract details

You can use the default system settings then select the Personal Income Taxes calculation rules for each employee accordingly.



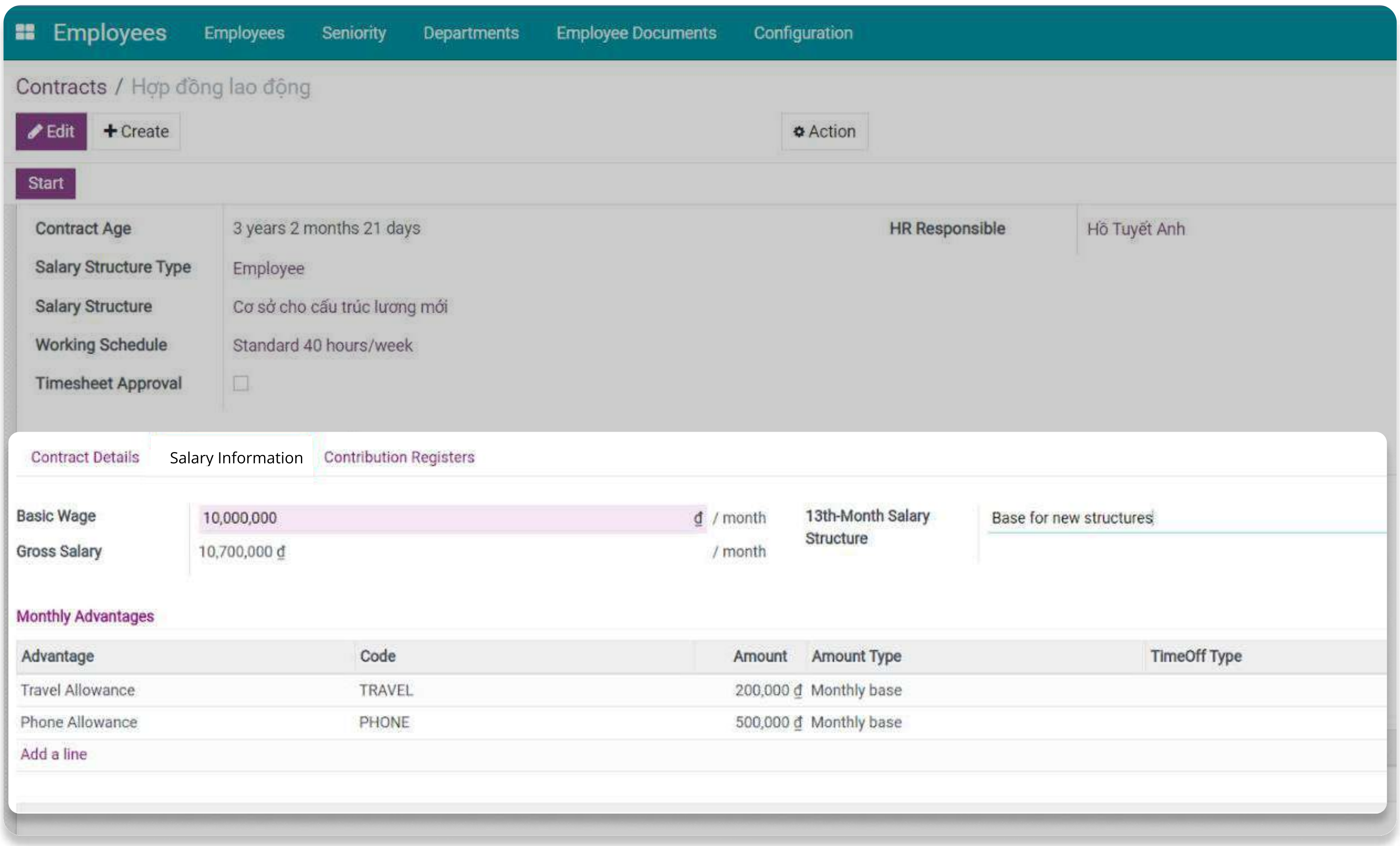
Salary Information

This is where you fill in employee salary information, including:

- *Basic Wage:* The wage that you have dealt with your employee.
- *Monthly Advantages:* Monthly advantages that employees receive. Press **Add a line** to add a new one, and the software will suggest the value in the Amount column following the settings on the HR Advantage Templates.

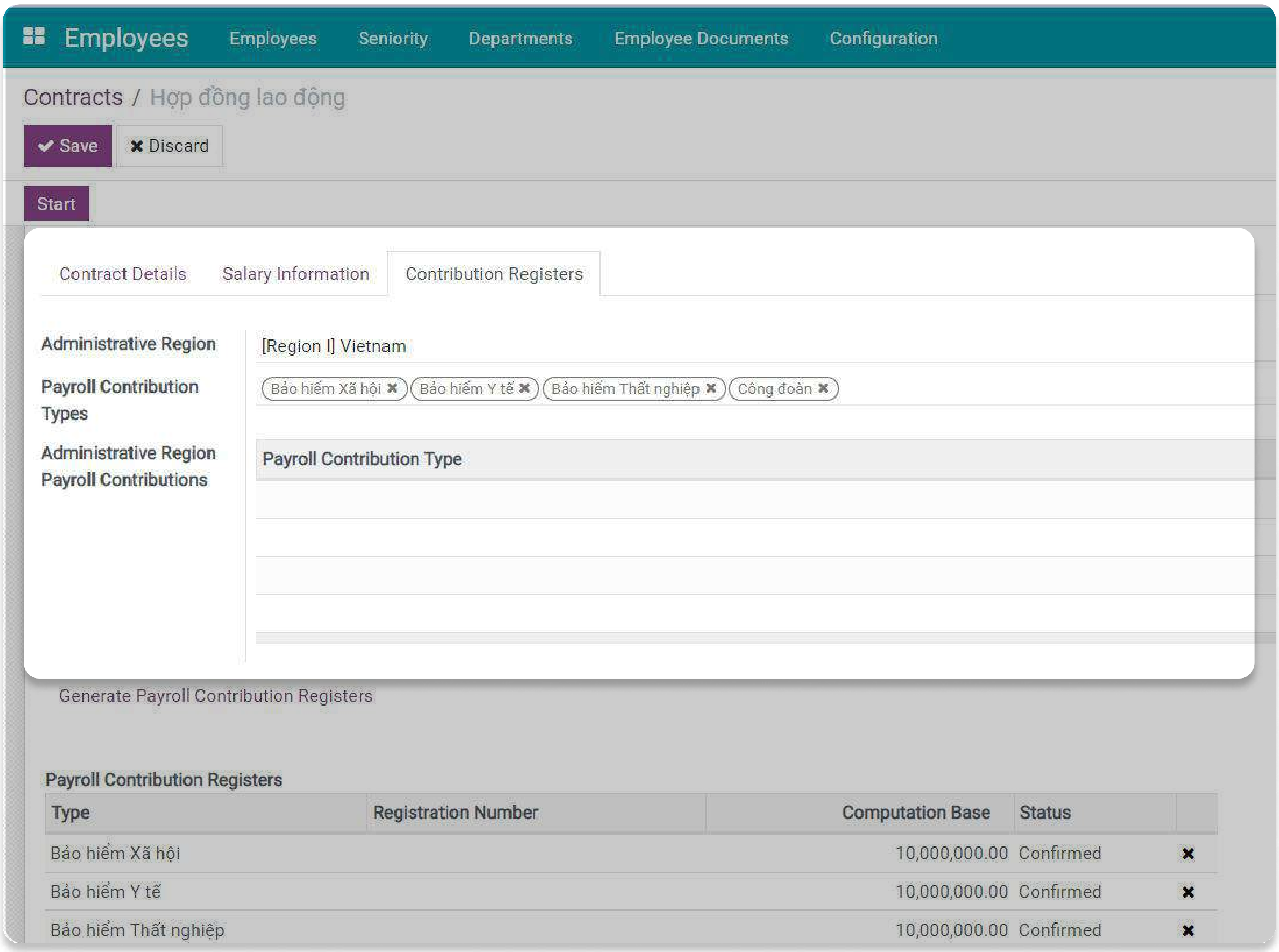
➡ See details at:

- *HR Advantage Templates*.

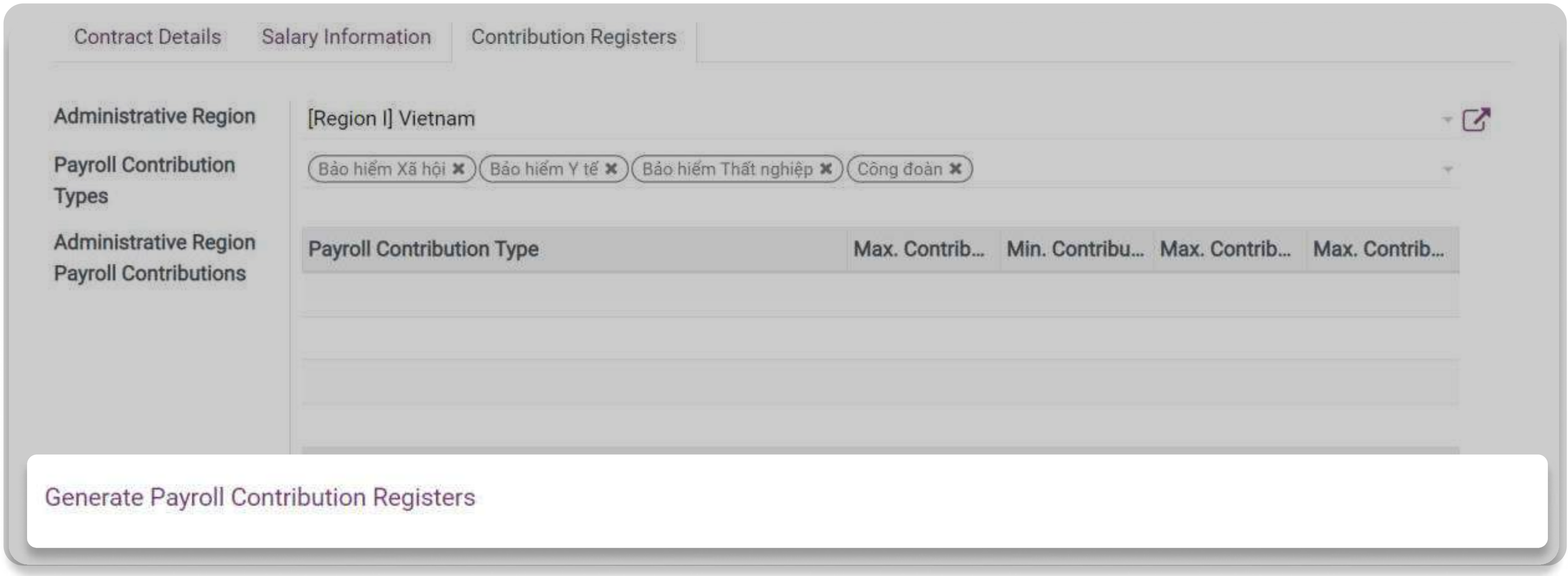


Contribution registers

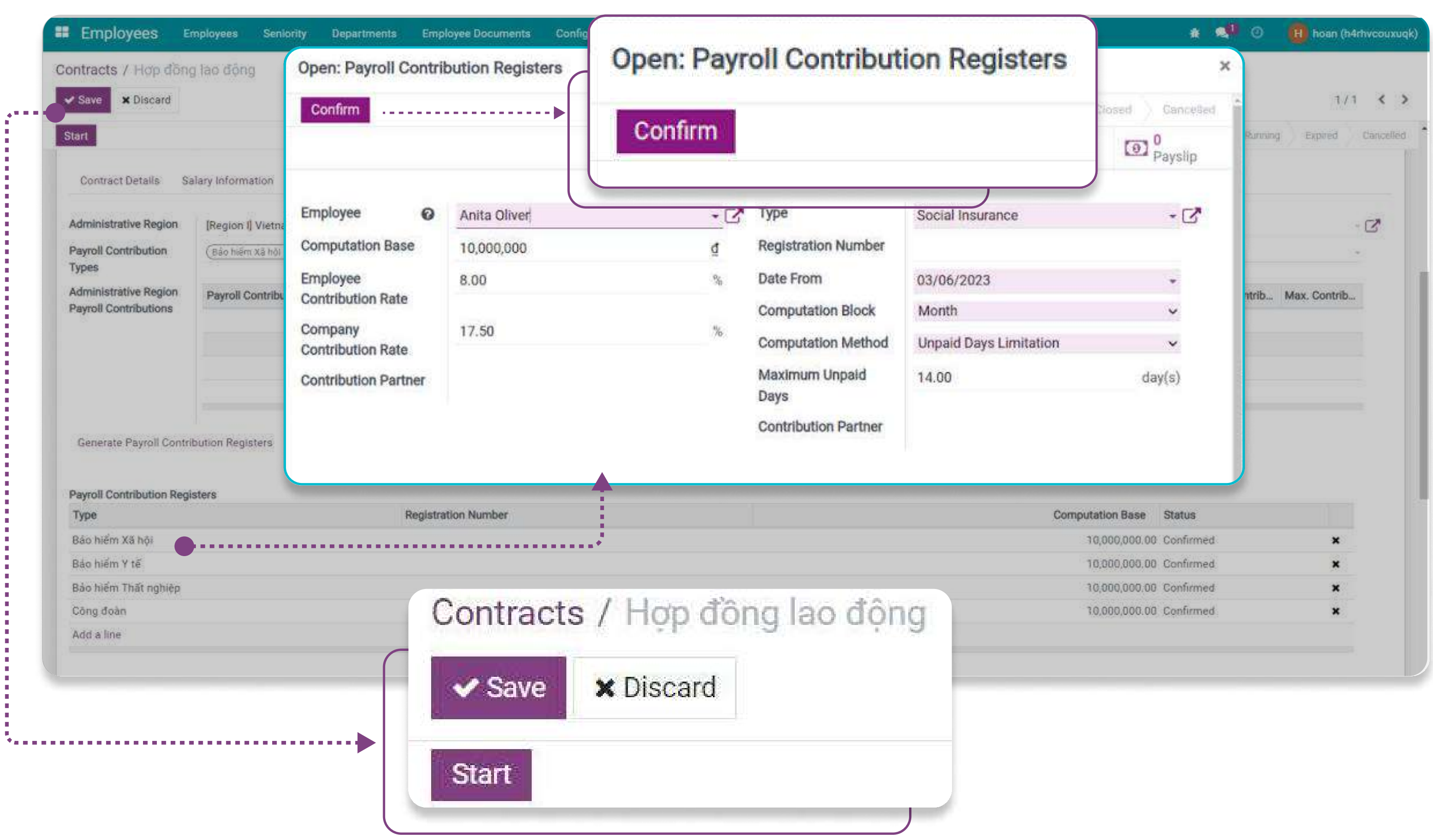
This is where employees' salary contributions are recorded. Click on **Payroll Contribution Types** to select employee salary contribution types.



Continue to press **Generate Payroll Contribution Registers:**



The system will automatically generate payroll contribution registers for employees following the contribution types you have selected, and they will be in *Draft* status. To change the information and confirm the registration, select each line to view the details of the registration and adjust the information if necessary, then press **Confirm.**



After you have set up the necessary information on the contract, you press the **Start** button for the contract to be considered valid.

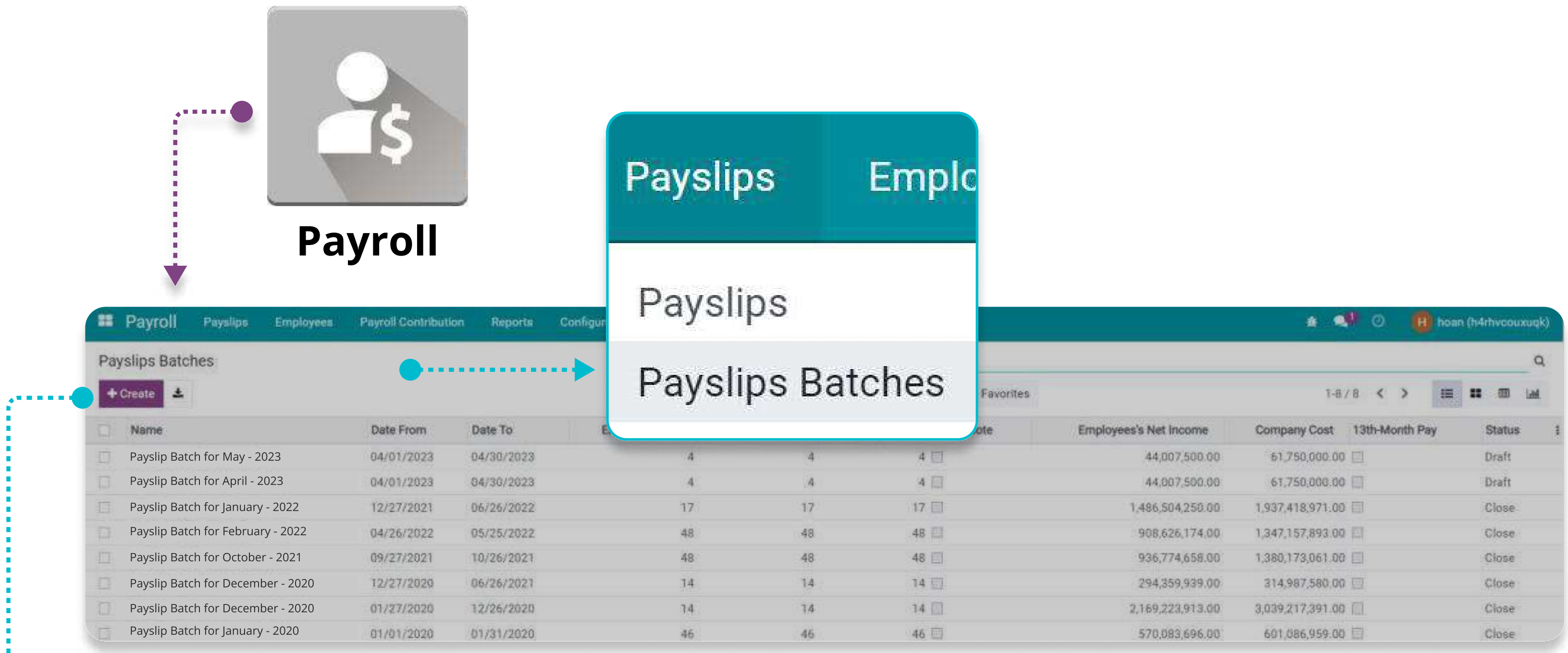
➡ See details at:

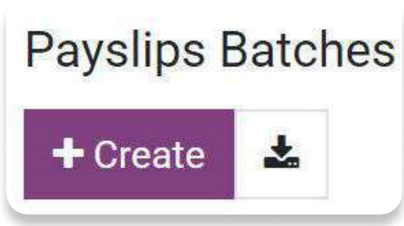
- *Create labour contract*.

PAYROLL CALCULATION

Generate payroll for the whole company

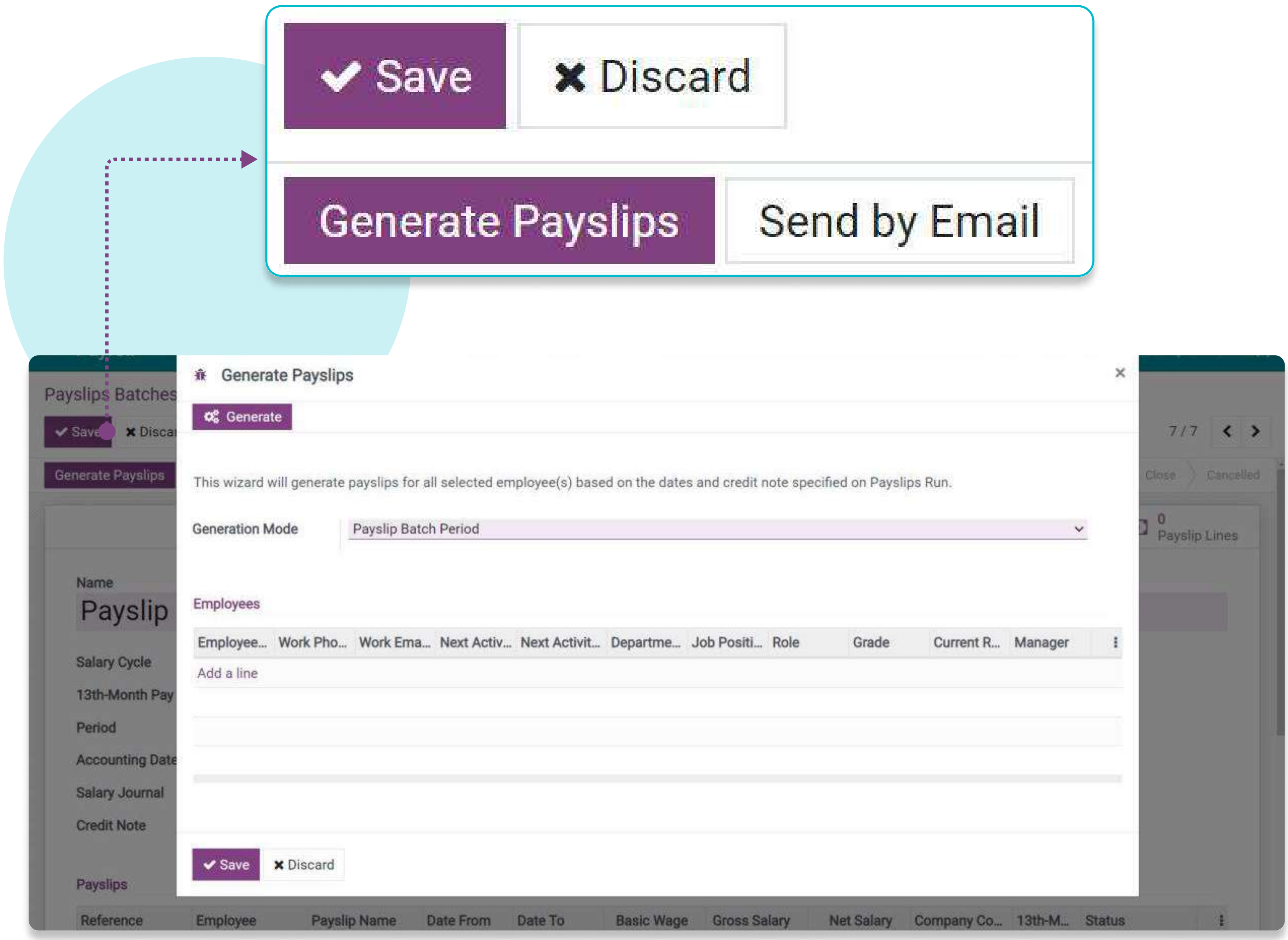
To generate a payroll, navigate to **Payroll ‣ Payslips ‣ Payslips Batches:**



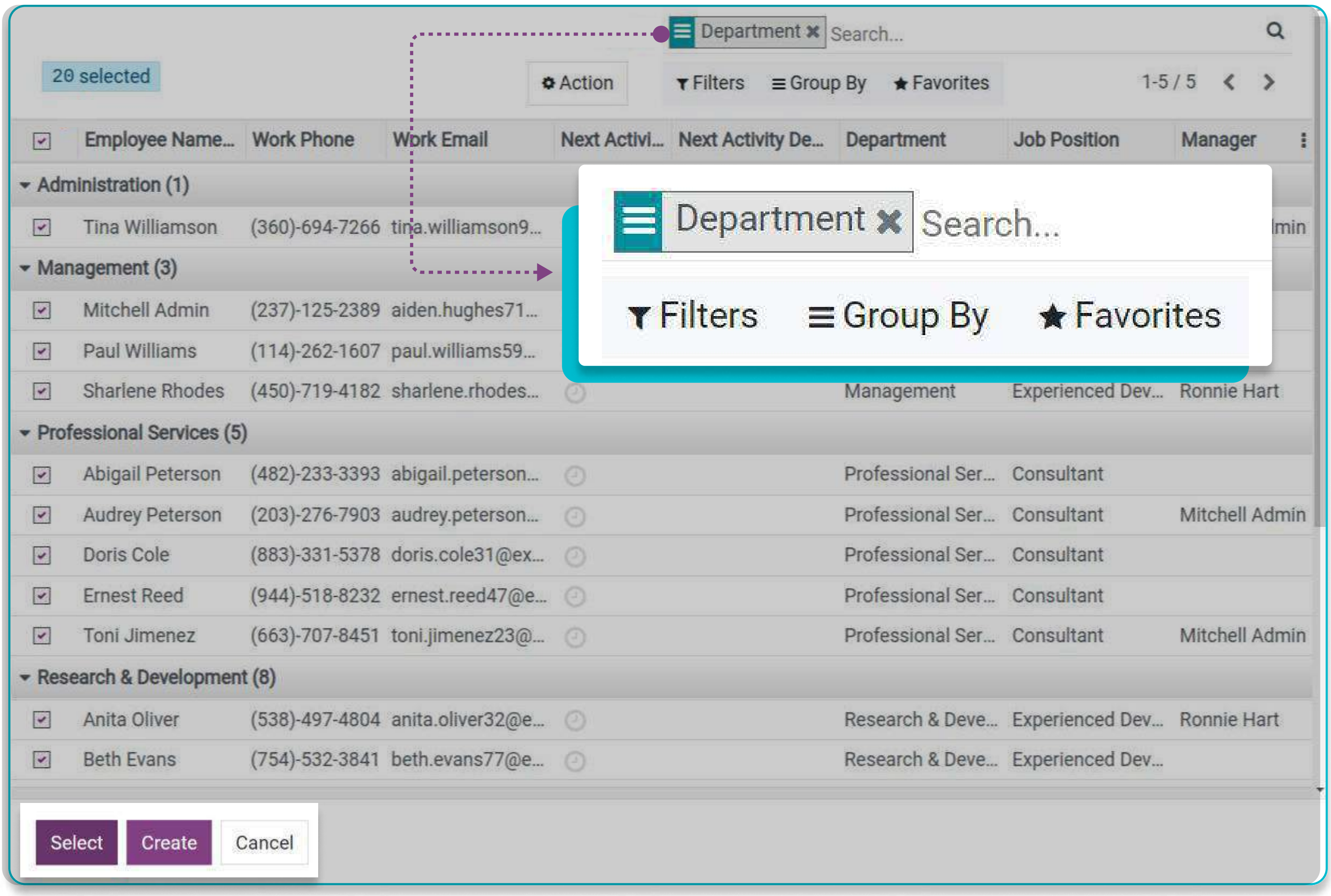


Click **Create** to open the detailed interface of Payslips Batch, enter general information such as *Name, Salary Cycle*, etc.

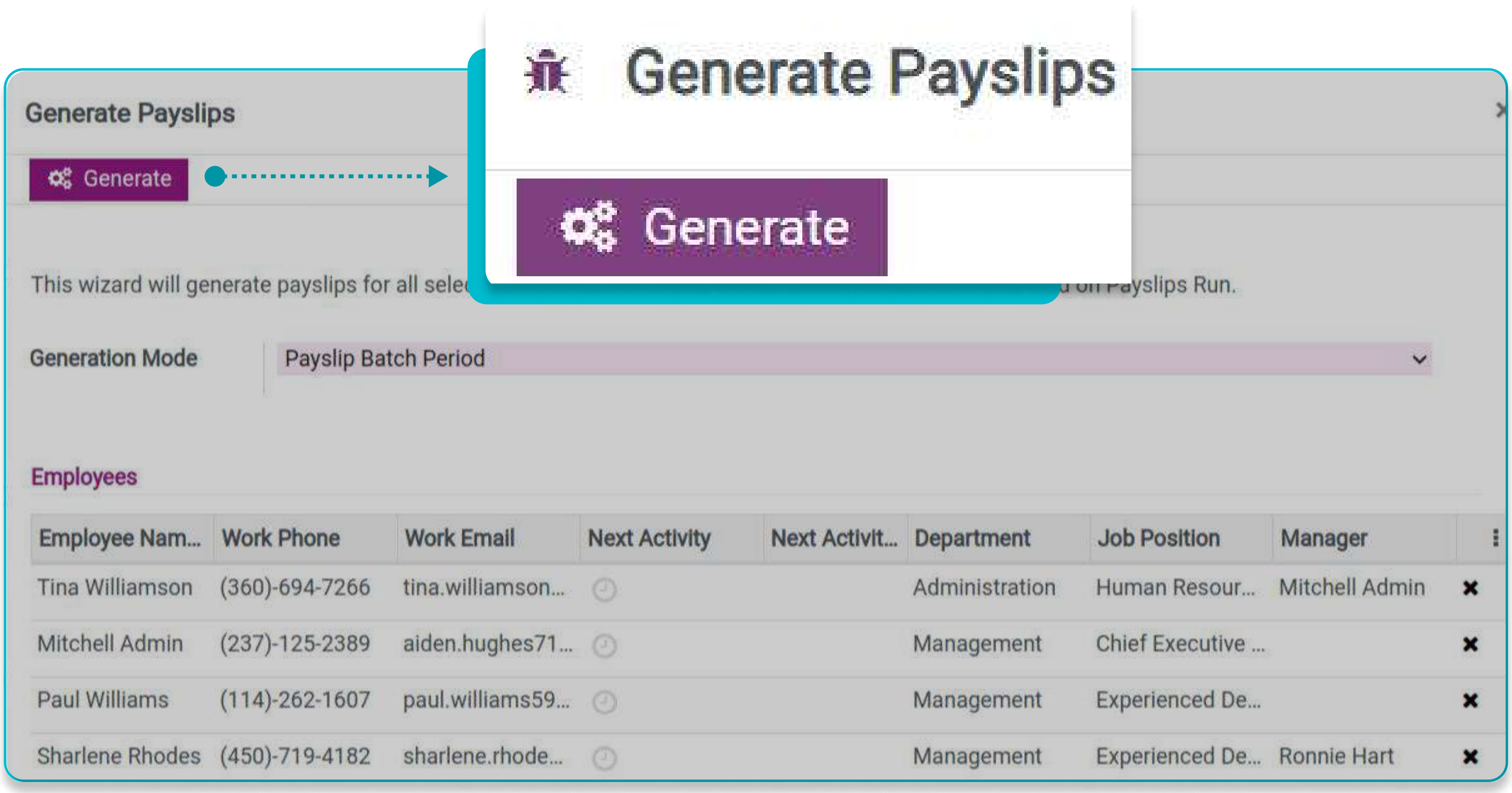
Press the **Generate Payslips** button to create payslips in bulk:



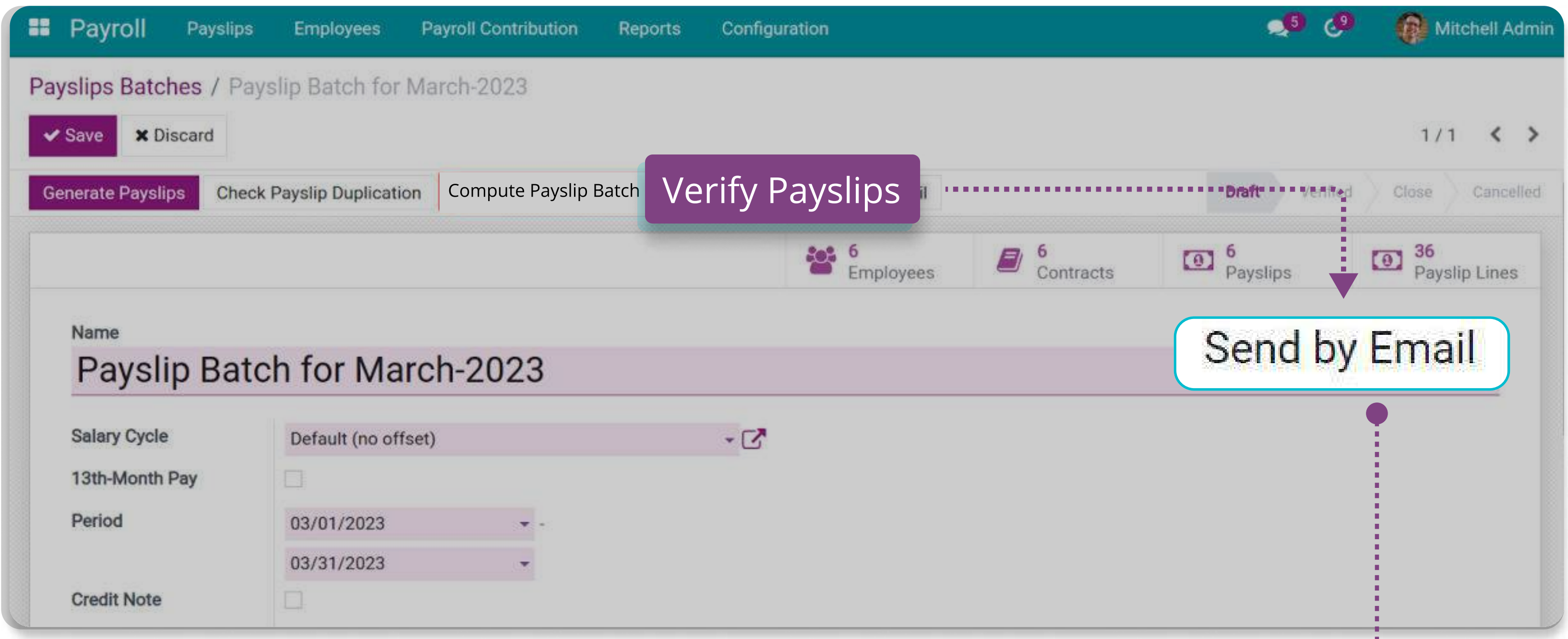
Click **Add a line** to select the employees for whom you need to create payslips. At this view, you can use the grouping and filter feature to search for certain employees, click to select all then press **Select.**



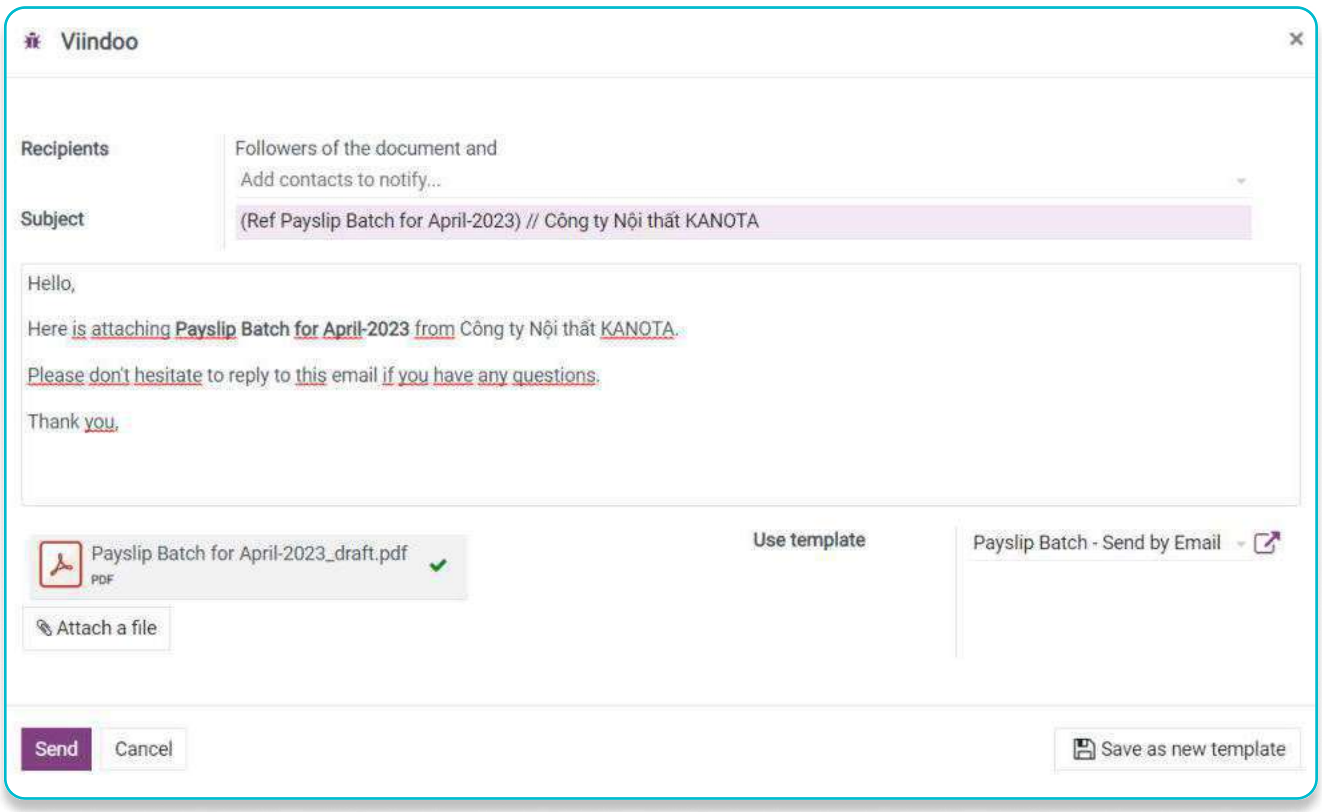
Click Generate on the payslip generation window to generate a payslips batch:



Click **Compute Payslips Batch** to have the system recalculate the payslips. Then press **Verify Payslips.**



Alternatively, you can press **Send by email** to send payroll information to banks or managers by adding relevant emails in the **Recipients** field on the view:



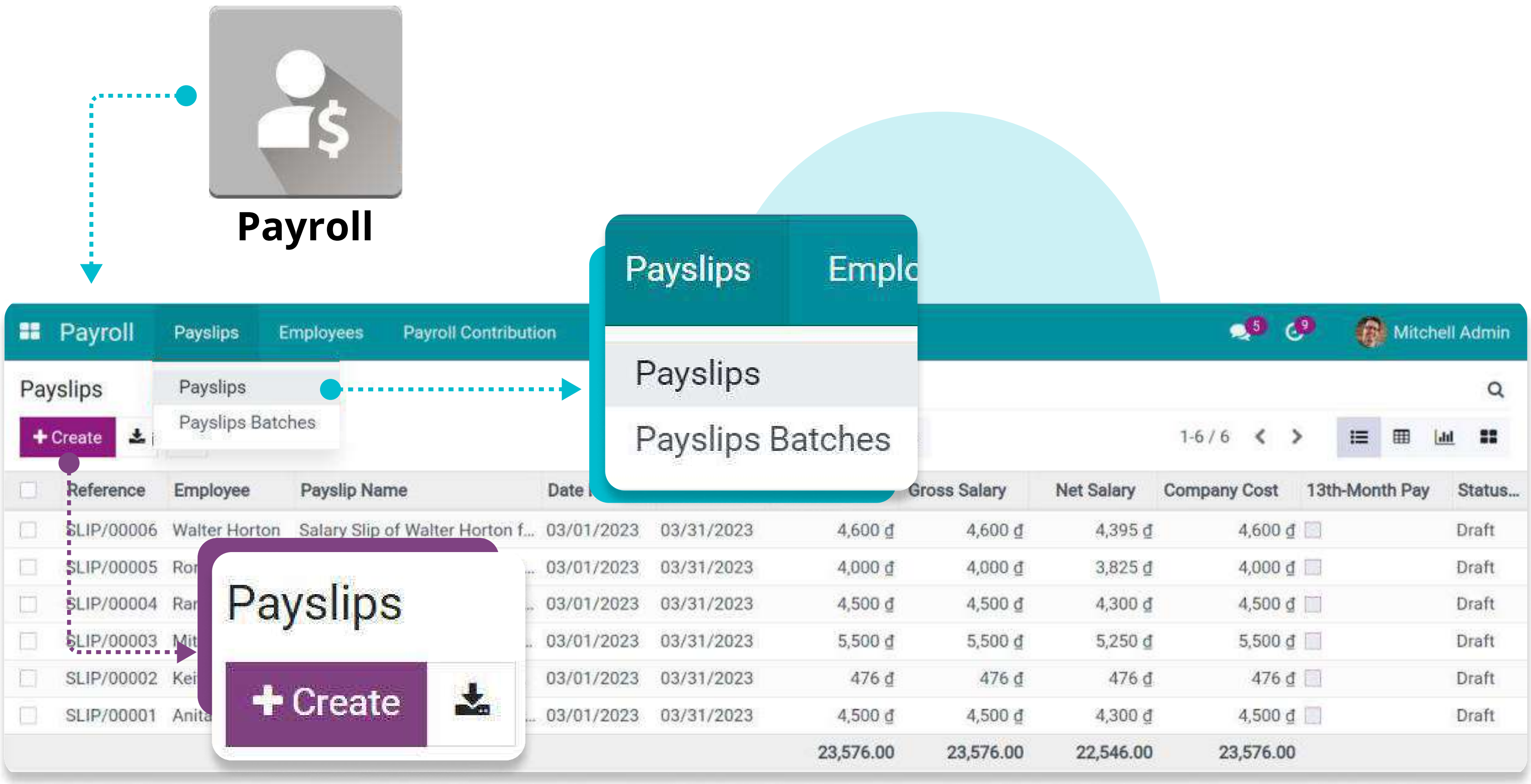
➡ **See details at:**

- *Instructions to create Payslips Batches on Viindoo software*.

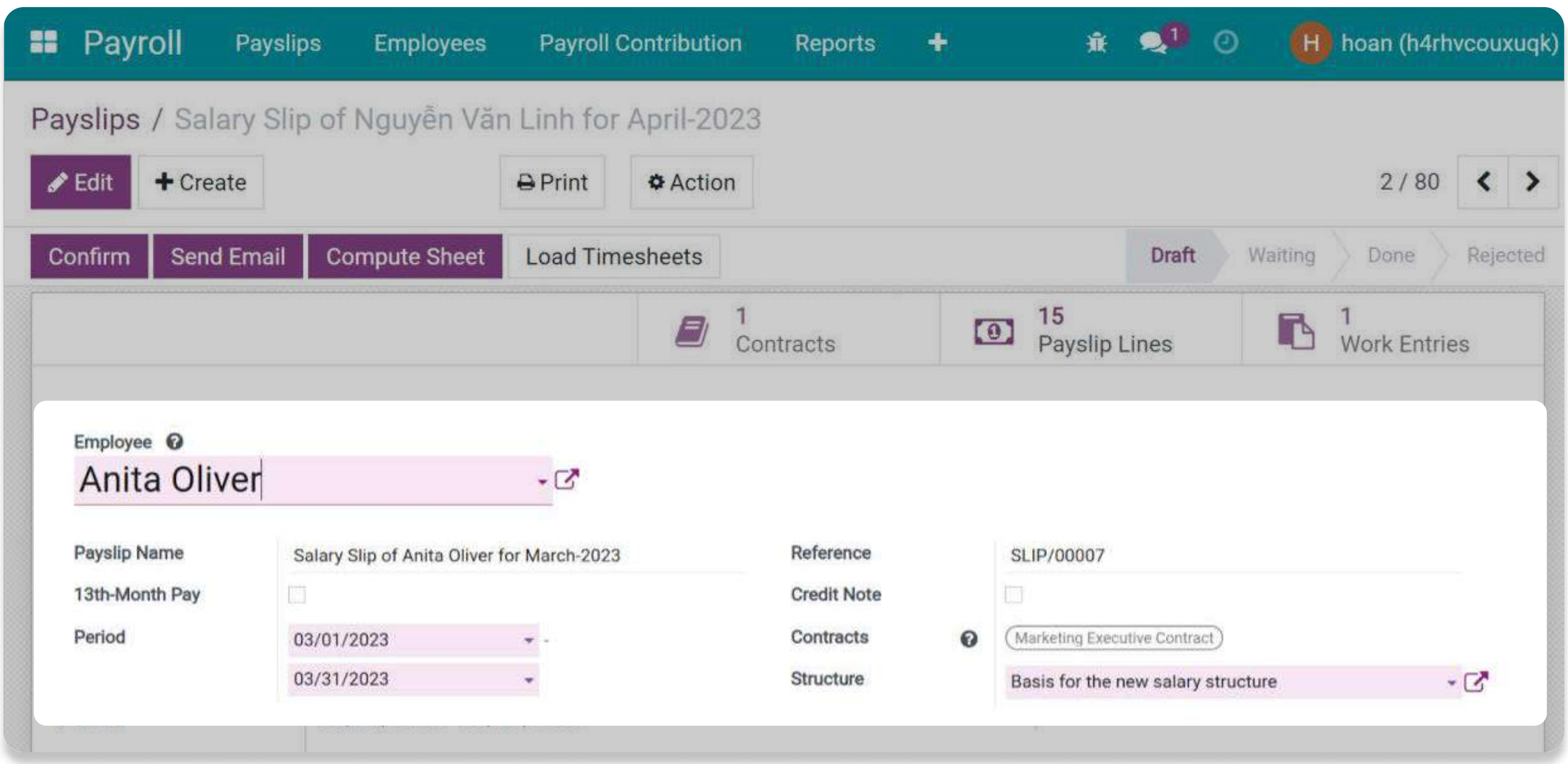
Create Payslips for each employee

Create payslips

To create payslips on the Viindoo salary management software, navigate to **Payroll ‣ Payslips ‣ Payslips ‣ Create.**

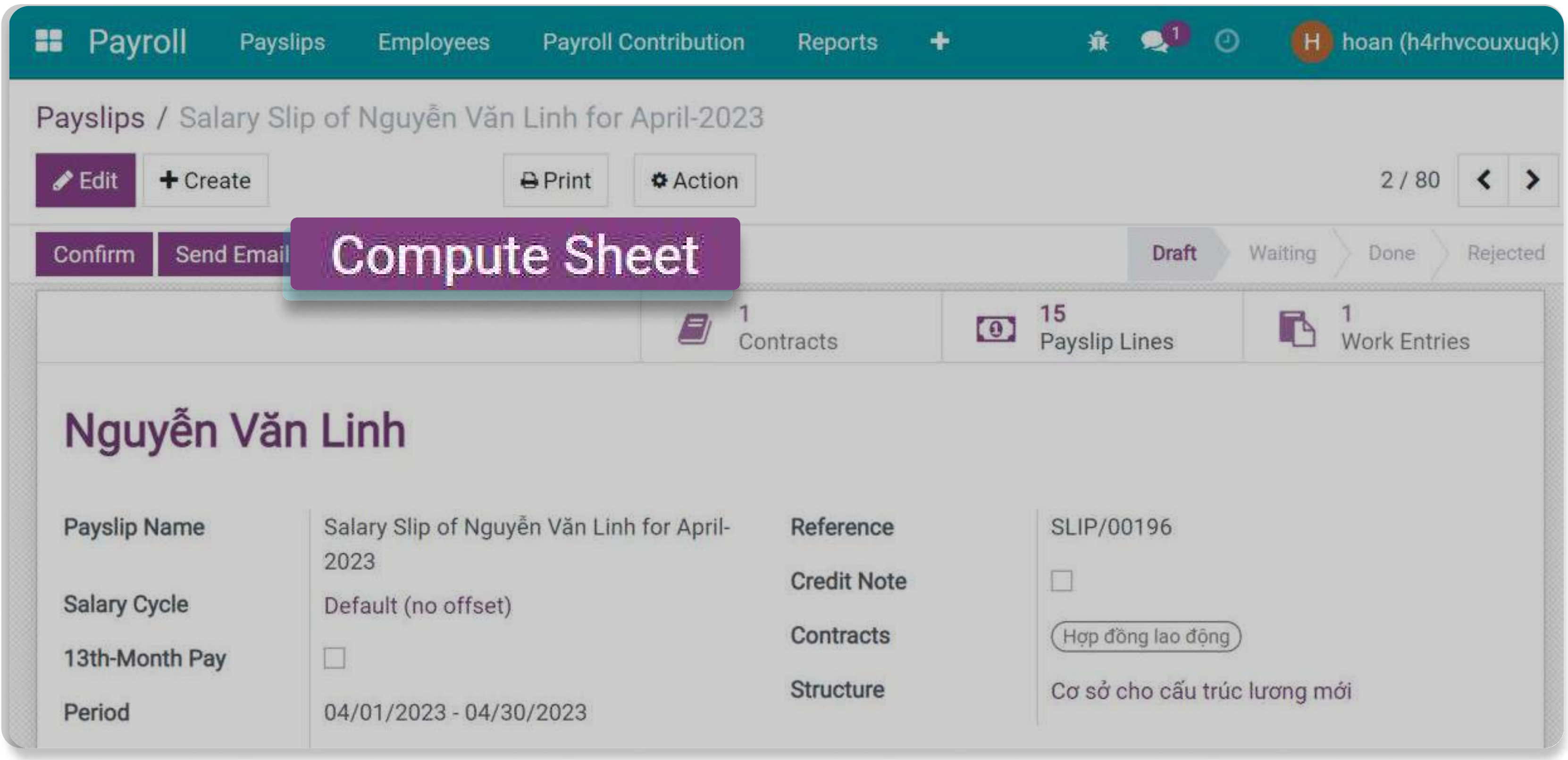


Enter the general information for the payslips:



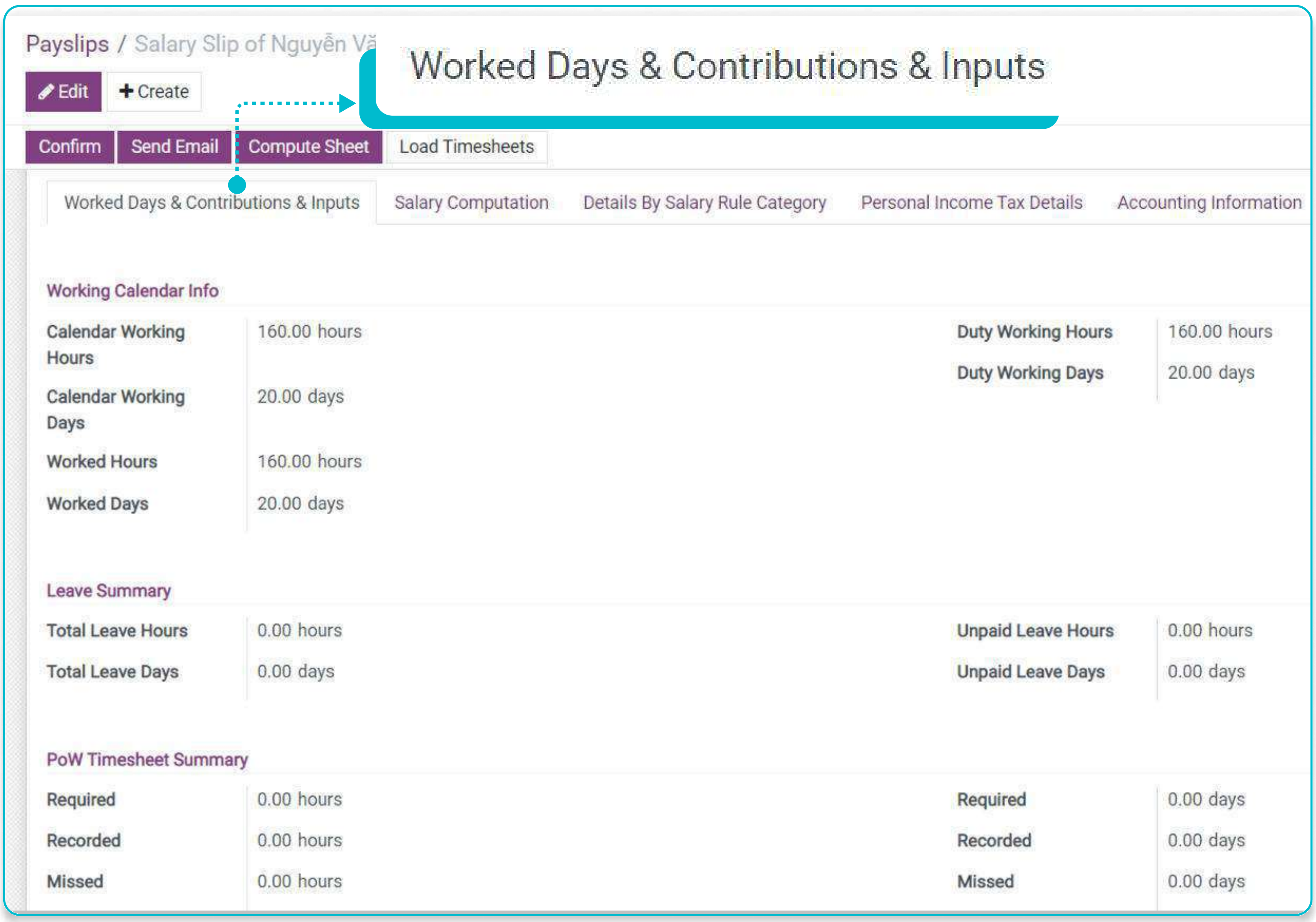
- *Employee:* Select an employee in your company's employee list.
- *Payslip Name:* The system will automatically suggest the payslip name based on the employee's name and the payslip period.
- *13th-Month Pay:* Enable if this is the payslip for the 13th-Month salary.
- *You can use the system's default settings for other information.*

After adding all the above information, click **Compute Sheet** to retrieve data from other related modules to fill in the payslip.



Check the information on the payslip

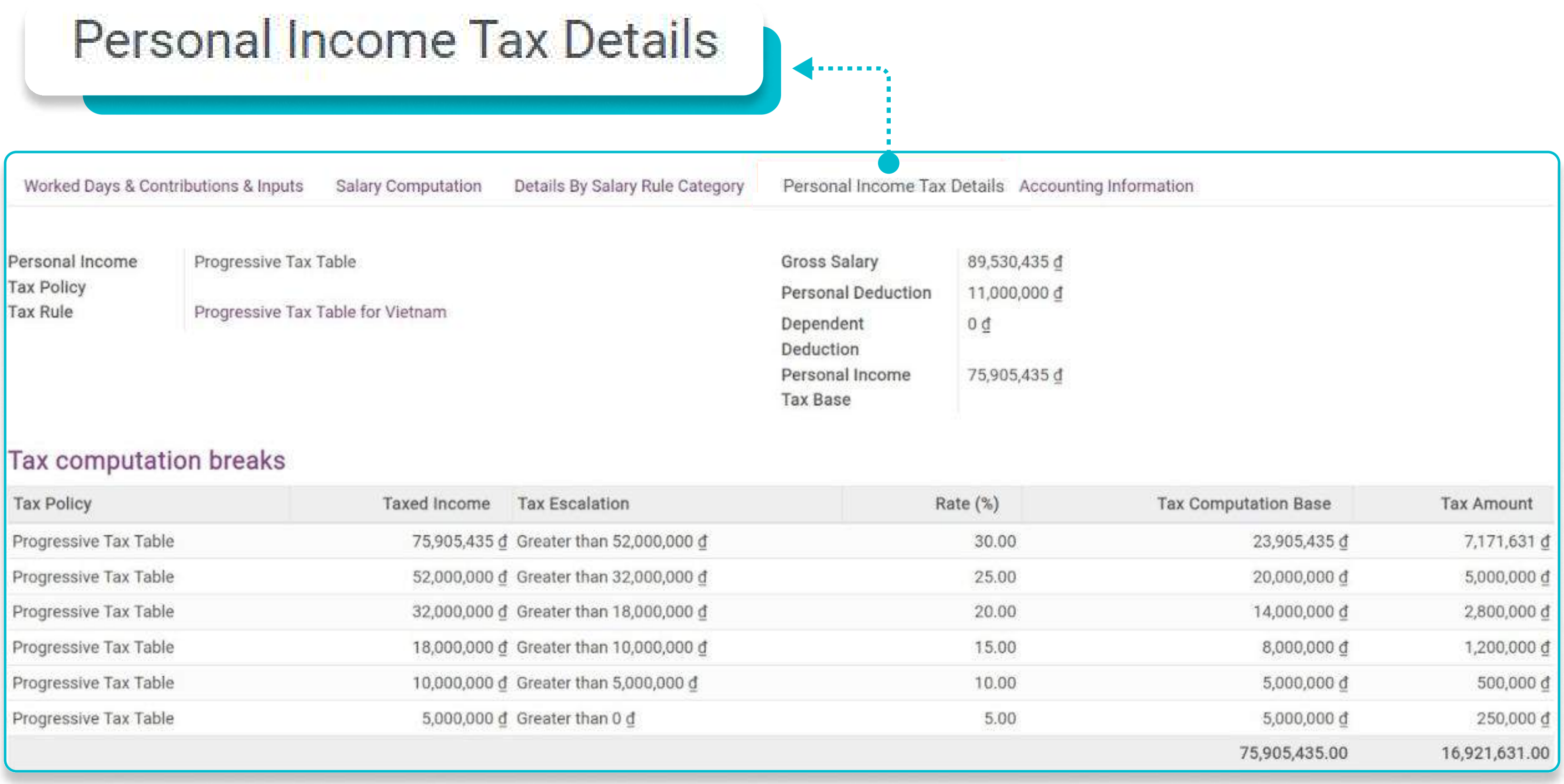
Detailed work schedule information, number of days off, number of days present:



Salary Computation:

Name	Code	Category	Quantity	Rate (%)	Rule	Amount	Total
Basic salary	BASIC	Basic (BASIC)	1.00	100.0000	Basic salary	23,913,043 ₫	23,913,043 ₫
Vehicle allowance	TRAVEL	Travel allowance (TRAVEL)	1.00	100.0000	Vehicle allowance	286,957 ₫	286,957 ₫
Responsibility allowance	RESPONSIBILI...	Responsibility allowance (RESPONSIBIL...	1.00	100.0000	Responsibility allowance	3,826,087 ₫	3,826,087 ₫
Performance	PERFORMANCE	Performance (PERFORMANCE)	1.00	100.0000	Performance	28,695,652 ₫	28,695,652 ₫
Gross	GROSS	Gross salary (GROSS)	1.00	100.0000	Gross	89,530,435 ₫	89,530,435 ₫
Employee Social Insurance	ESINS	Employee insurance (E_INSURANCE)	1.00	100.0000	Employee Social Insurance	-2,000,000 ₫	-2,000,000 ₫
Social Insurance by Company	CSINS	Social Insurance by company (C_INSUR...	1.00	100.0000	Social Insurance by Company	4,250,000 ₫	4,250,000 ₫
Employee health Insurance	EHINS	Employee insurance (E_INSURANCE)	1.00	100.0000	Employee health Insurance	-375,000 ₫	-375,000 ₫
Employee health insurance (Company)	CHINS	Social Insurance by company (C_INSUR...	1.00	100.0000	Employee health insurance (Company)	750,000 ₫	750,000 ₫
Unemployment insurance	EUEINS	Employee insurance (E_INSURANCE)	1.00	100.0000	Unemployment insurance	-250,000 ₫	-250,000 ₫
Labor fees by company	CLUF	Labor fees by company (C_LU)	1.00	100.0000	Labor fees by company	500,000 ₫	500,000 ₫
Deduct Taxable base of personal incom...	TBDED	Miscellaneous (MISC)	1.00	100.0000	Deduct Taxable base of personal incom...	13,625,000 ₫	13,625,000 ₫
Taxable base of personal income tax	TAXBASE	Taxable base of personal income tax (T...	1.00	100.0000	Taxable base of personal income tax	75,905,435 ₫	75,905,435 ₫
Personal income tax	PTAX	Personal income tax (PTAX)	1.00	100.0000	Personal income tax	-16,921,630 ₫	-16,921,630 ₫
Net salary	NET	Net (NET)	1.00	100.0000	Net salary	69,983,804 ₫	69,983,804 ₫

Personal Income Tax Details:

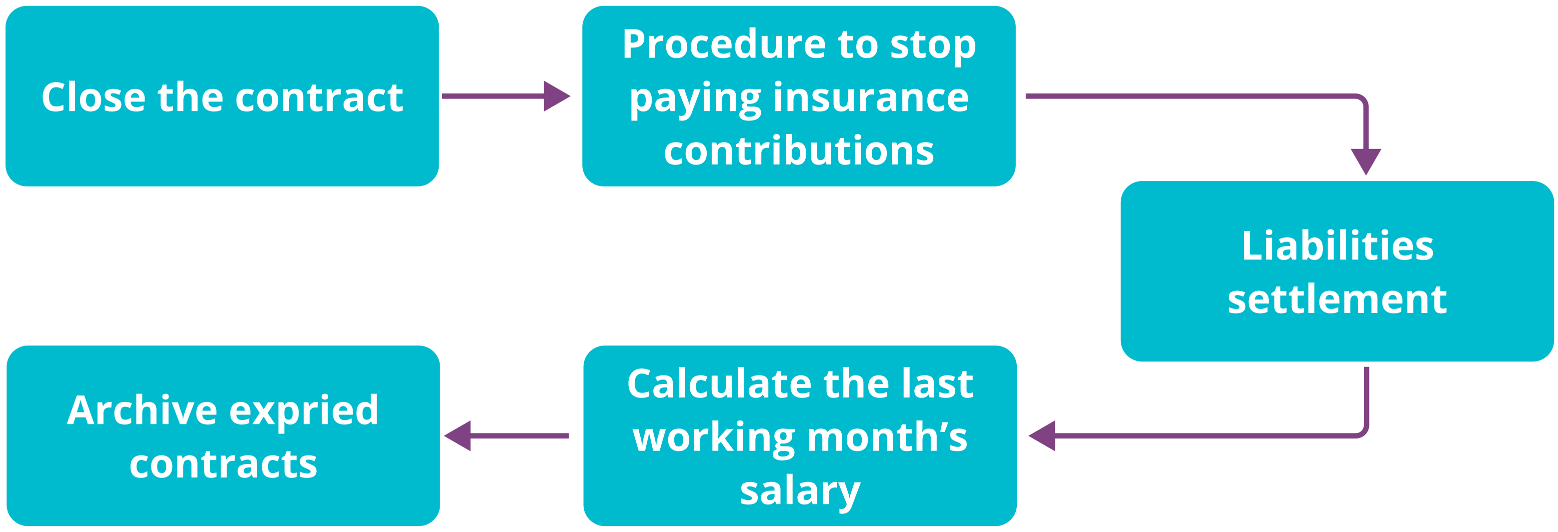


Tax Policy	Taxed Income	Tax Escalation	Rate (%)	Tax Computation Base	Tax Amount
Progressive Tax Table	75,905,435 ₫	Greater than 52,000,000 ₫	30.00	23,905,435 ₫	7,171,631 ₫
Progressive Tax Table	52,000,000 ₫	Greater than 32,000,000 ₫	25.00	20,000,000 ₫	5,000,000 ₫
Progressive Tax Table	32,000,000 ₫	Greater than 18,000,000 ₫	20.00	14,000,000 ₫	2,800,000 ₫
Progressive Tax Table	18,000,000 ₫	Greater than 10,000,000 ₫	15.00	8,000,000 ₫	1,200,000 ₫
Progressive Tax Table	10,000,000 ₫	Greater than 5,000,000 ₫	10.00	5,000,000 ₫	500,000 ₫
Progressive Tax Table	5,000,000 ₫	Greater than 0 ₫	5.00	5,000,000 ₫	250,000 ₫
				75,905,435.00	16,921,631.00

➡ **See details at:**

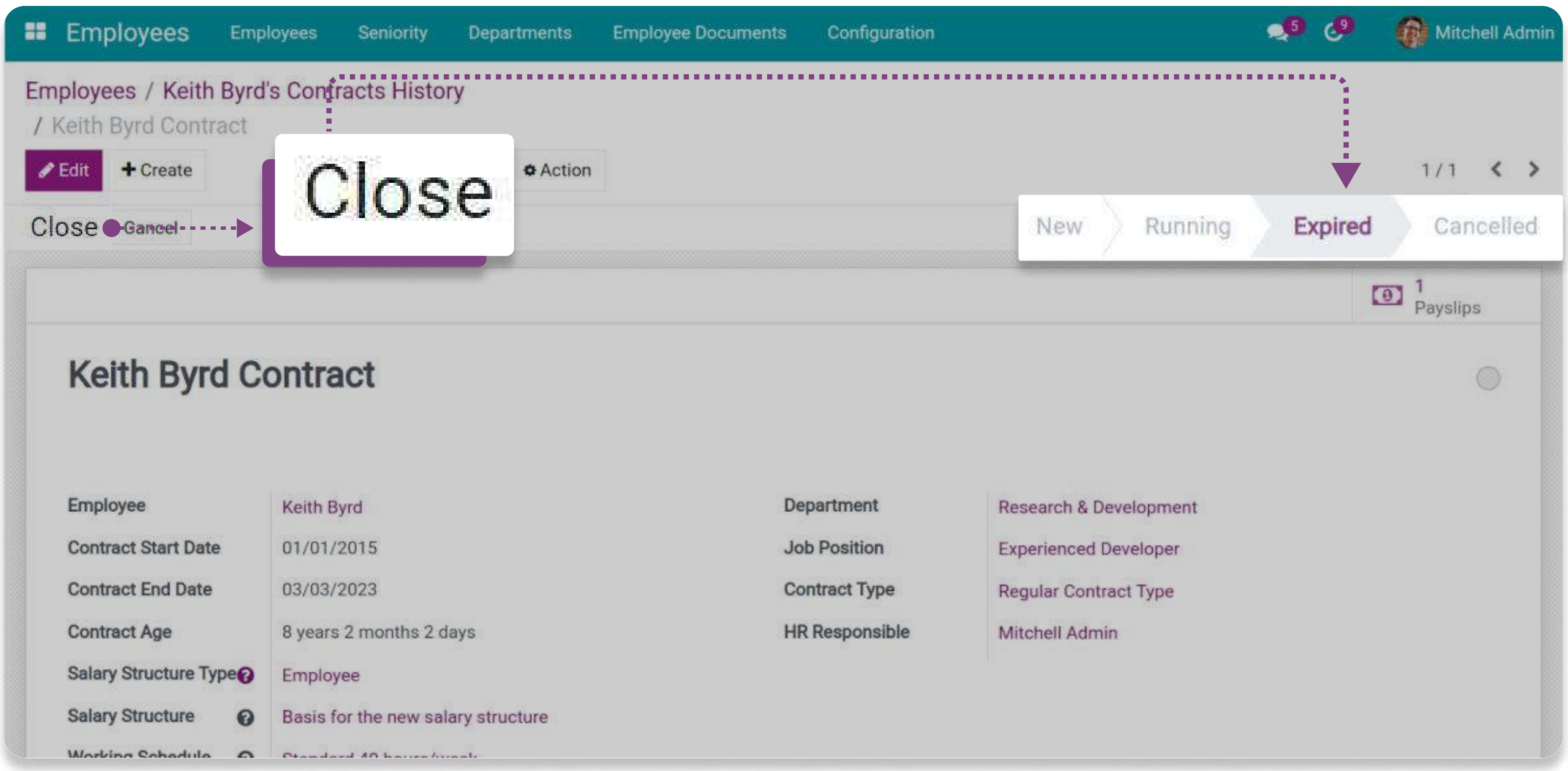
- *[How to create Payslip for each employee in Viindoo](#).*

HANDLING LEAVING EMPLOYEE FILE



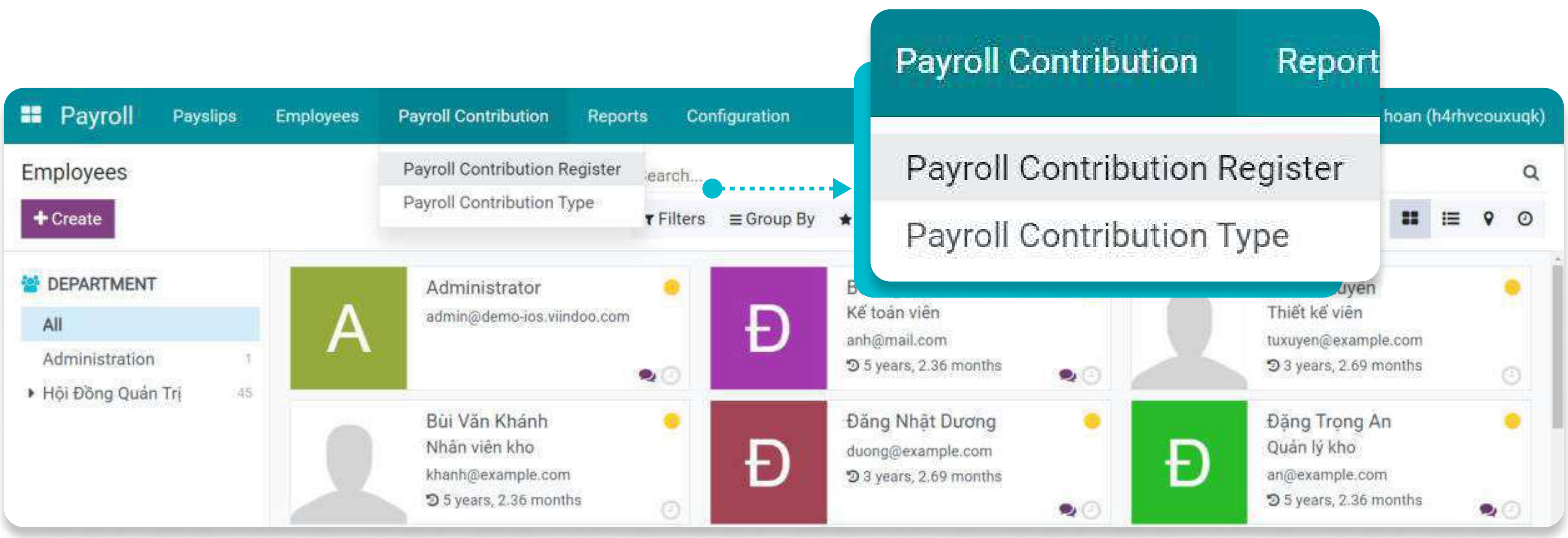
Close the contract

Click the **Close** button on the employee's contract to set it to **Expired**. Besides, when the current date is the contract end date, its status will also be changed to **Expired** automatically.

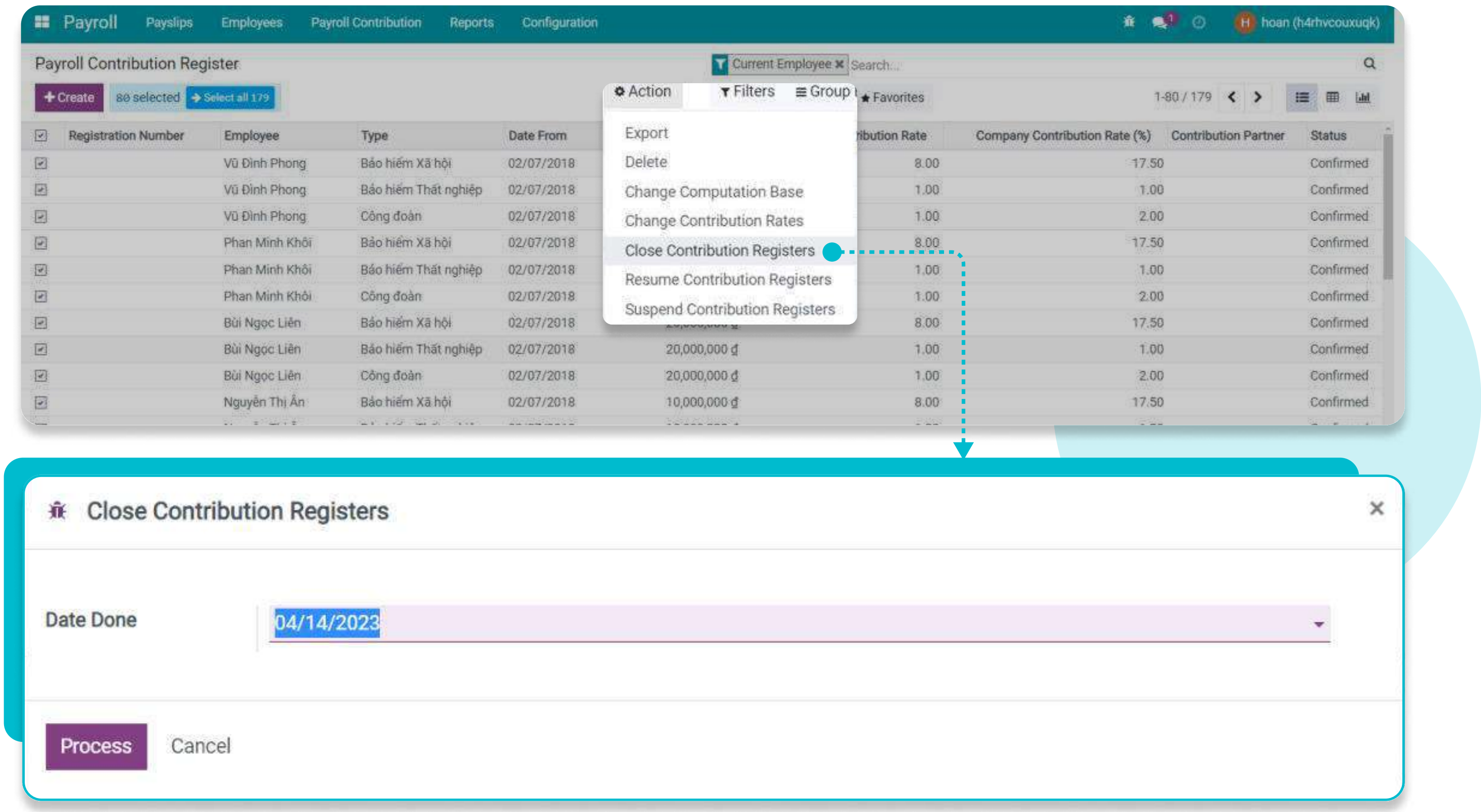


Procedure to stop paying insurance contributions

Navigate to **Payroll ‣ Payroll Contribution ‣ Payroll Contribution Register:**



Use the filter to filter out the Contribution Registrations from this employee's salary. Check the box, press **Action ‣ Close Contribution Registers**, enter **Date done** and press **Process:**



Liabilities settlement

When an employee quits the job, the HR department needs to report to the accounting department to check all the employee's liabilities, such as employee advances, expenses, etc. In addition, the HR department also needs to calculate the salary for the annual leave days and the payables according to the salary for this employee.

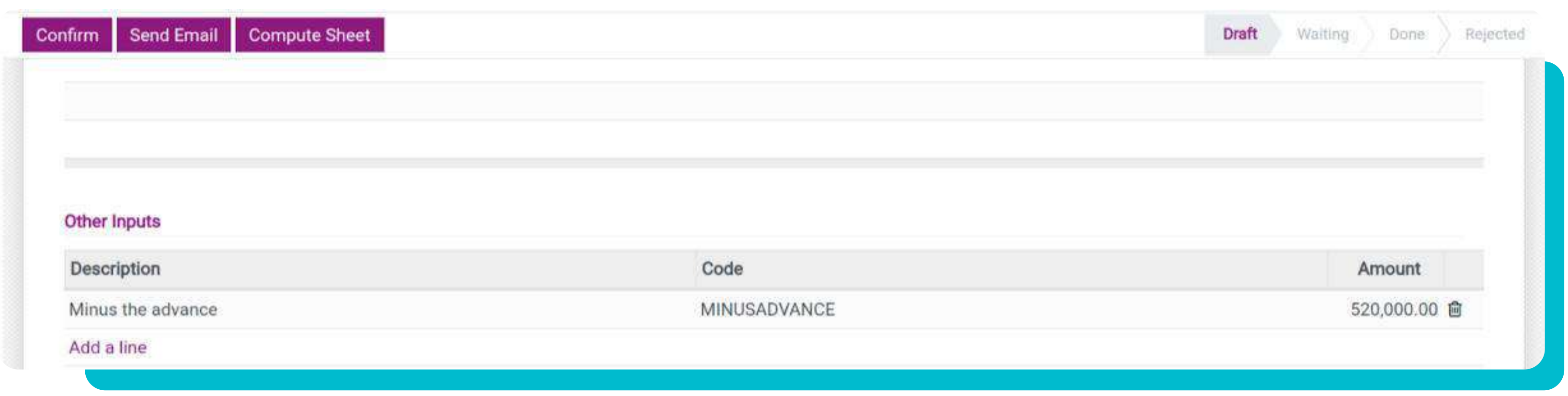
Calculate the last working month's salary

After obtaining data from the Accounting department, the HR department will proceed to create the last payslip for this employee.

You can read more details on how to create a payslip:

> ➡ See details at:
>
> - *Create payslips for each employee.*

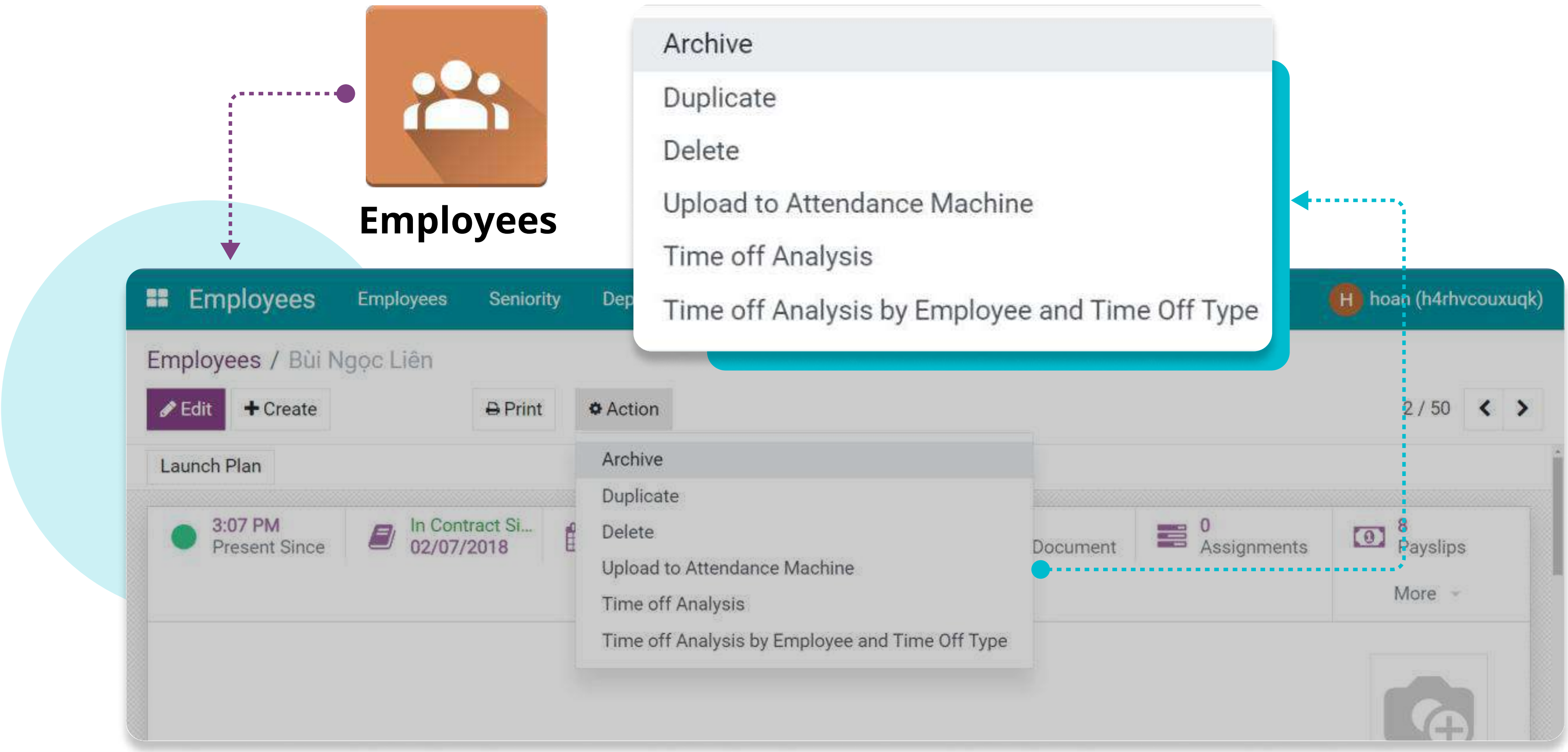
Don't forget to record all receivables and payables of employees in the **Other Inputs** table. Press **Add a line** then *add Description*, *Code*, and *respective Amount*.



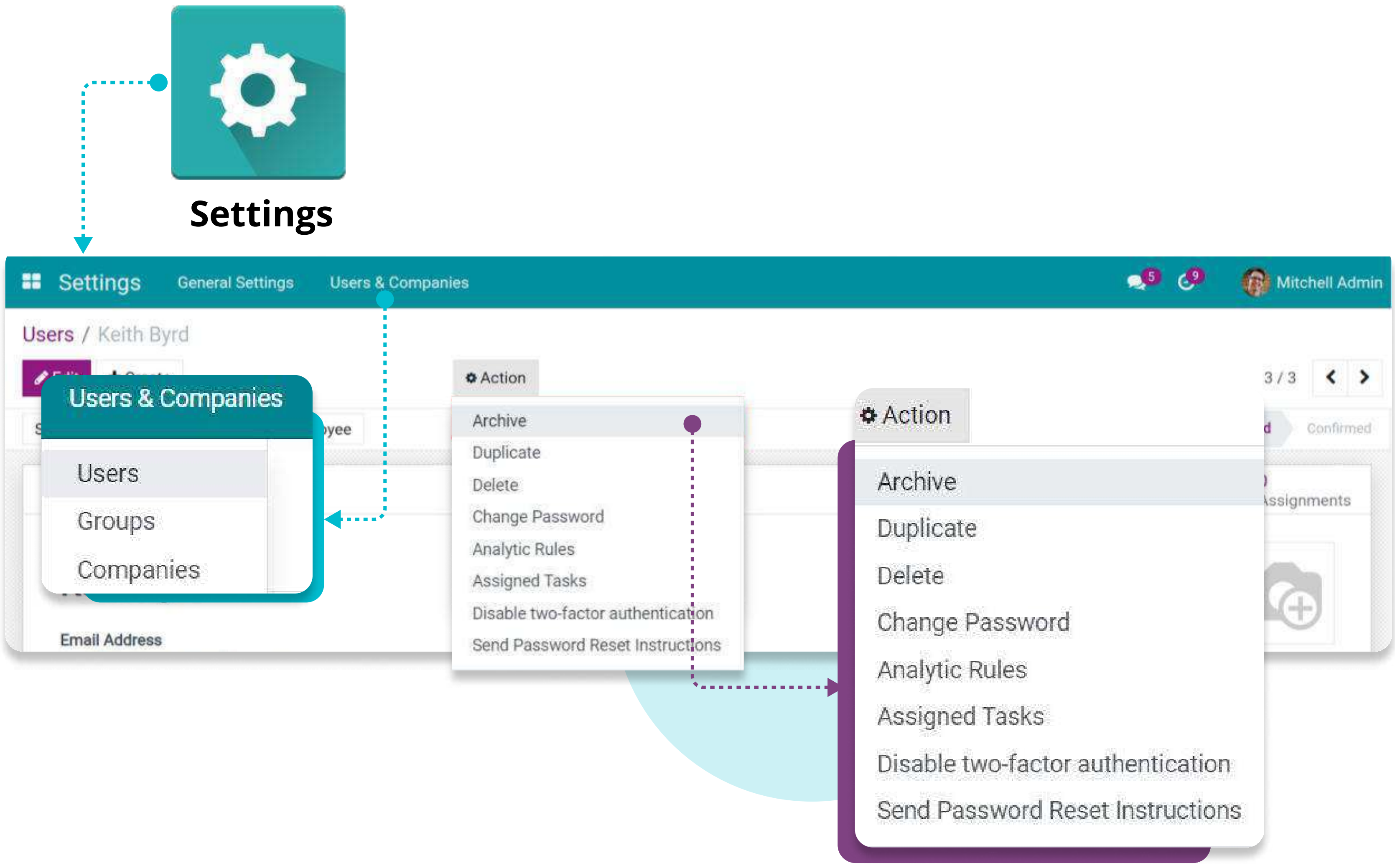
Archive expired contracts

The last thing you need to do for a leaving employee is archive the contract and user account.

- *For the contract:* Navigate to **Employees ‣ Employees**, find the contract of that terminated employee, press **Action**, select **Archive:**



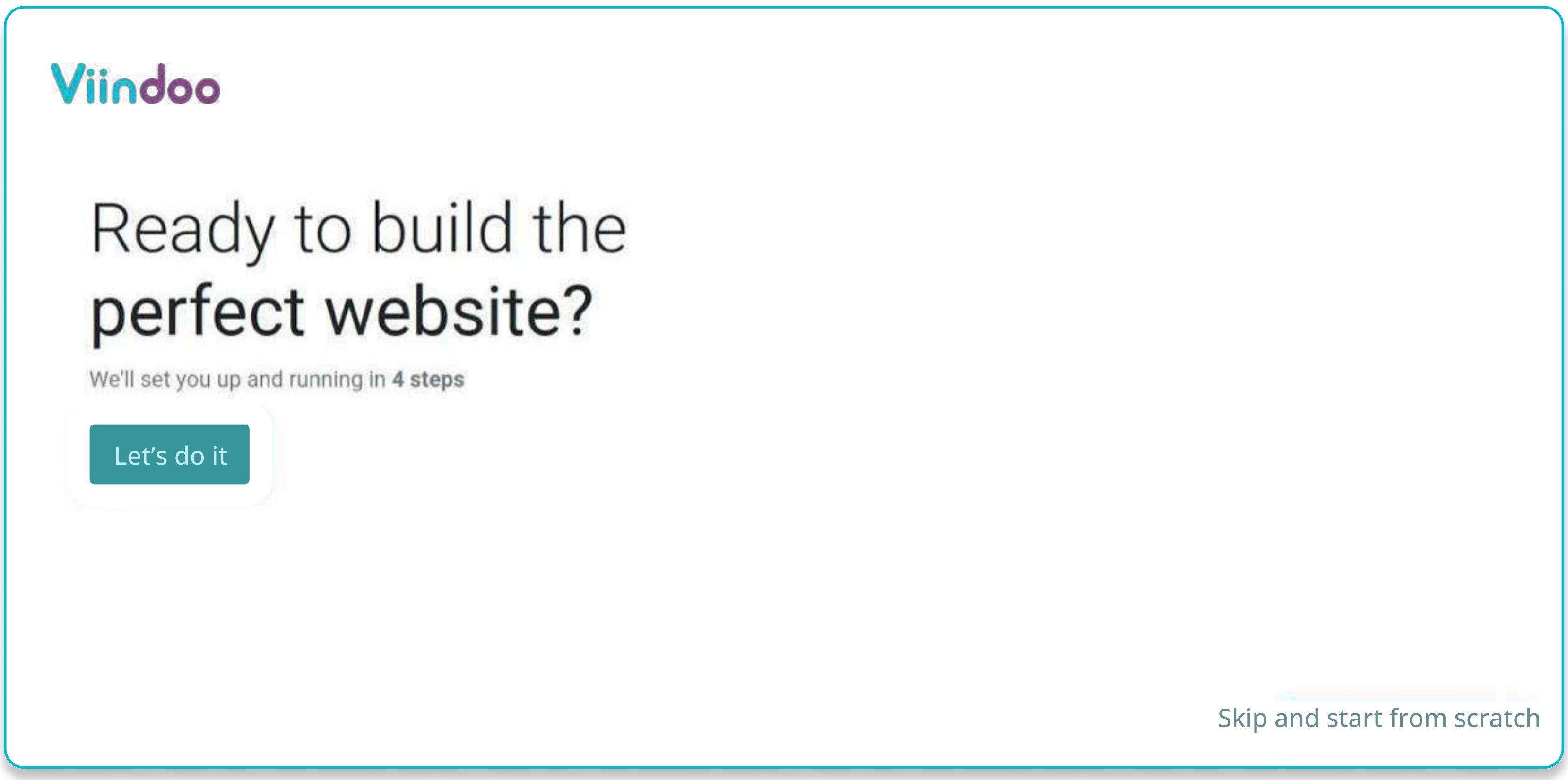
- ***For the user account**: Navigate to **Settings ‣ Users & Companies ‣ Users**, find the user account of that terminated employee, press **Action**, select **Archive:***



➡ *Check out Viindoo's suggestions for website management by job positions in Appendix: Website management - (Page 143).*

CREATE A WEBSITE WITH AN EXISTING THEME IN VIINDOO

Navigate to **Apps** to search for and install the **Website** app. Once installed, you will be automatically redirected to the building of a new website interface.



Press **Let's do it** to follow the step-by-step instructions to start the initial settings process. The setup time might take a couple of minutes, depending on the number of web pages and features that you want to configure.

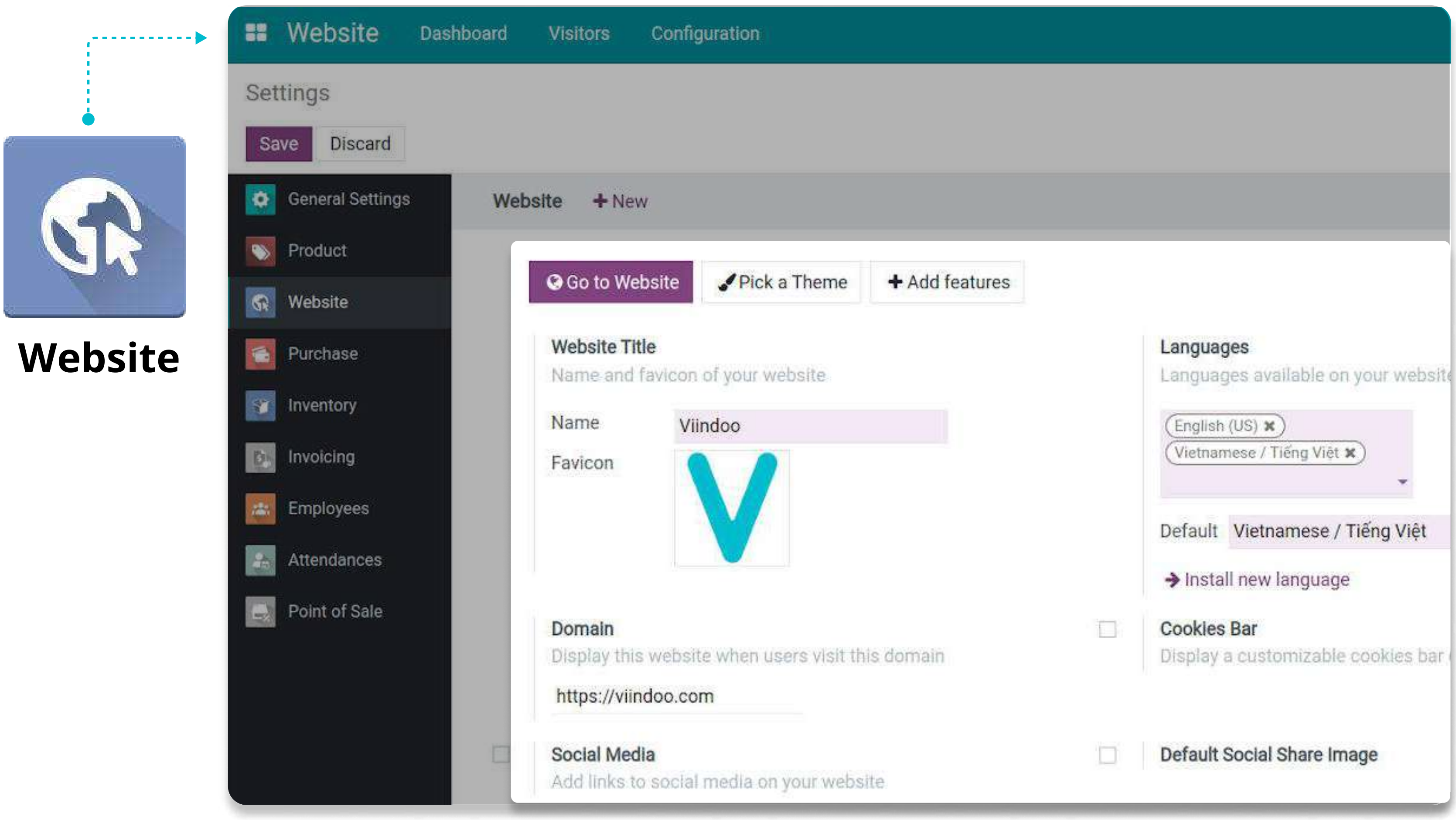
You can always press **Skip and start from scratch** anytime during this process to return to the initial website theme selection interface.

➡ See details at:

- *Build a website from an existing theme in Viindoo.*

CONFIGURE A WEBSITE

Navigate to **Website ‣ Configuration ‣ Settings** to set up the branding identity for your website such as website title, favicon, domain, etc.



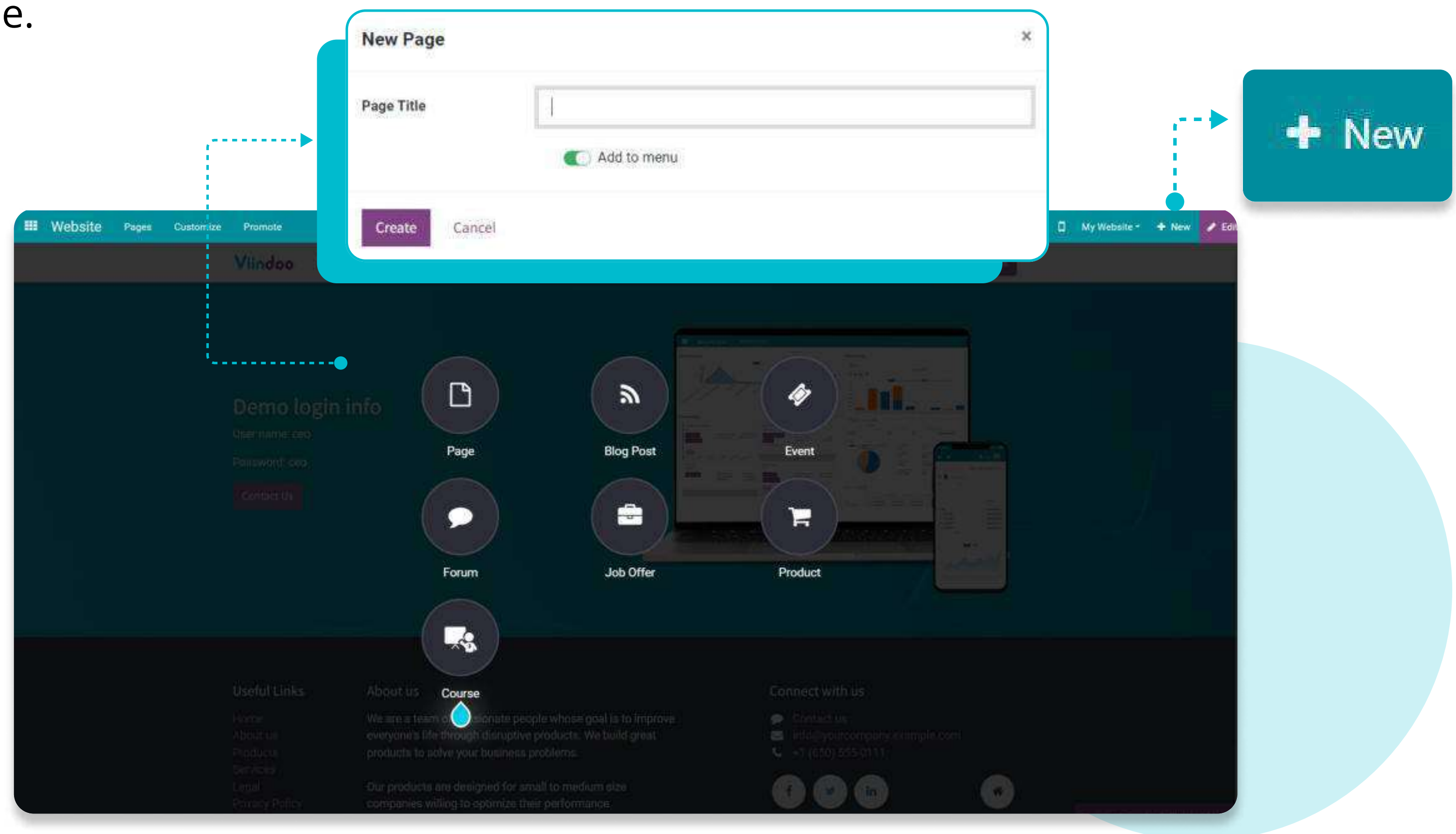
➡ See details at:

- *How to use your own domain name.*
- *How to set up a multi-language website.*

DESIGN A WEB PAGE

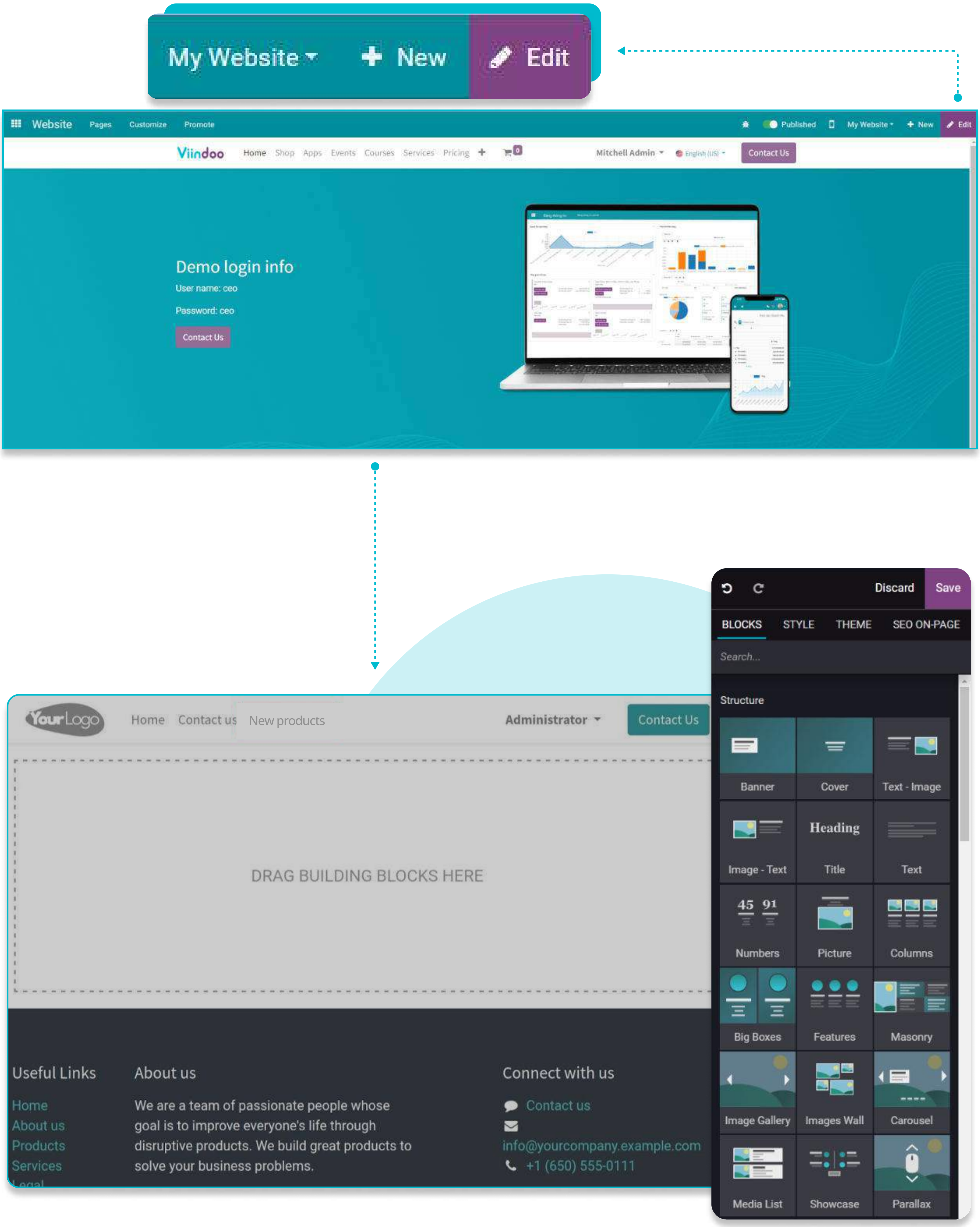
Create a new web page

On the website interface, press + **New**, then select the **Page** option to create a new one.



Enable **Add to menu** if you want this page to be accessible from the menu bar of your website.

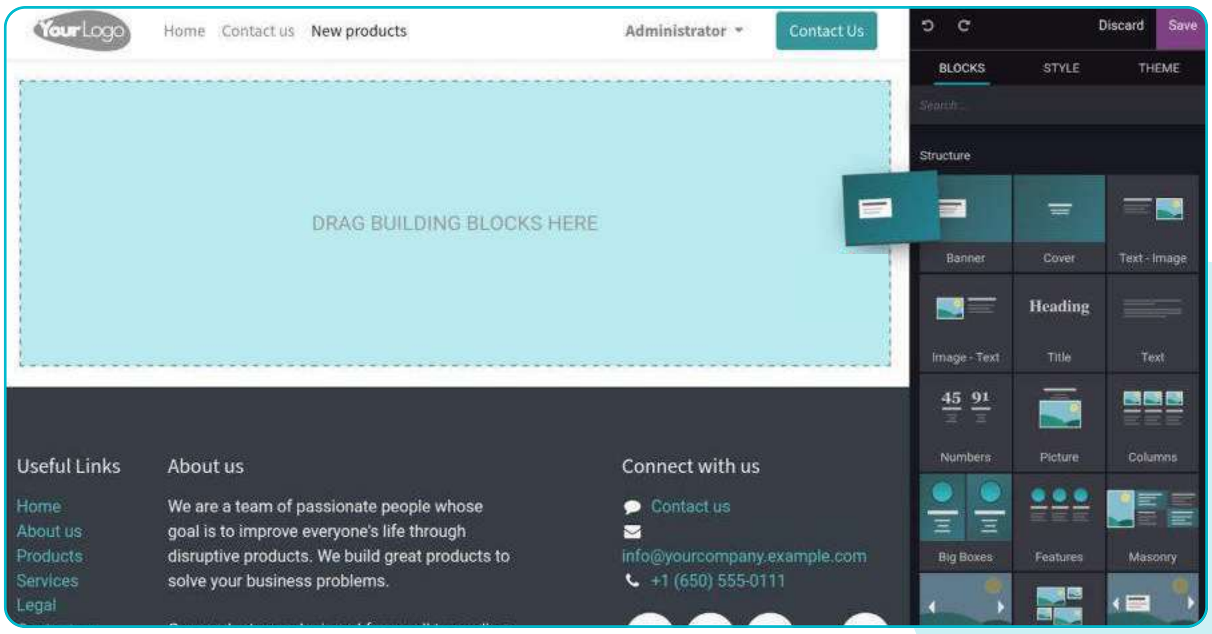
Press the **Edit** button at the top right corner of your screen to open the Edit master and start editing your web page.



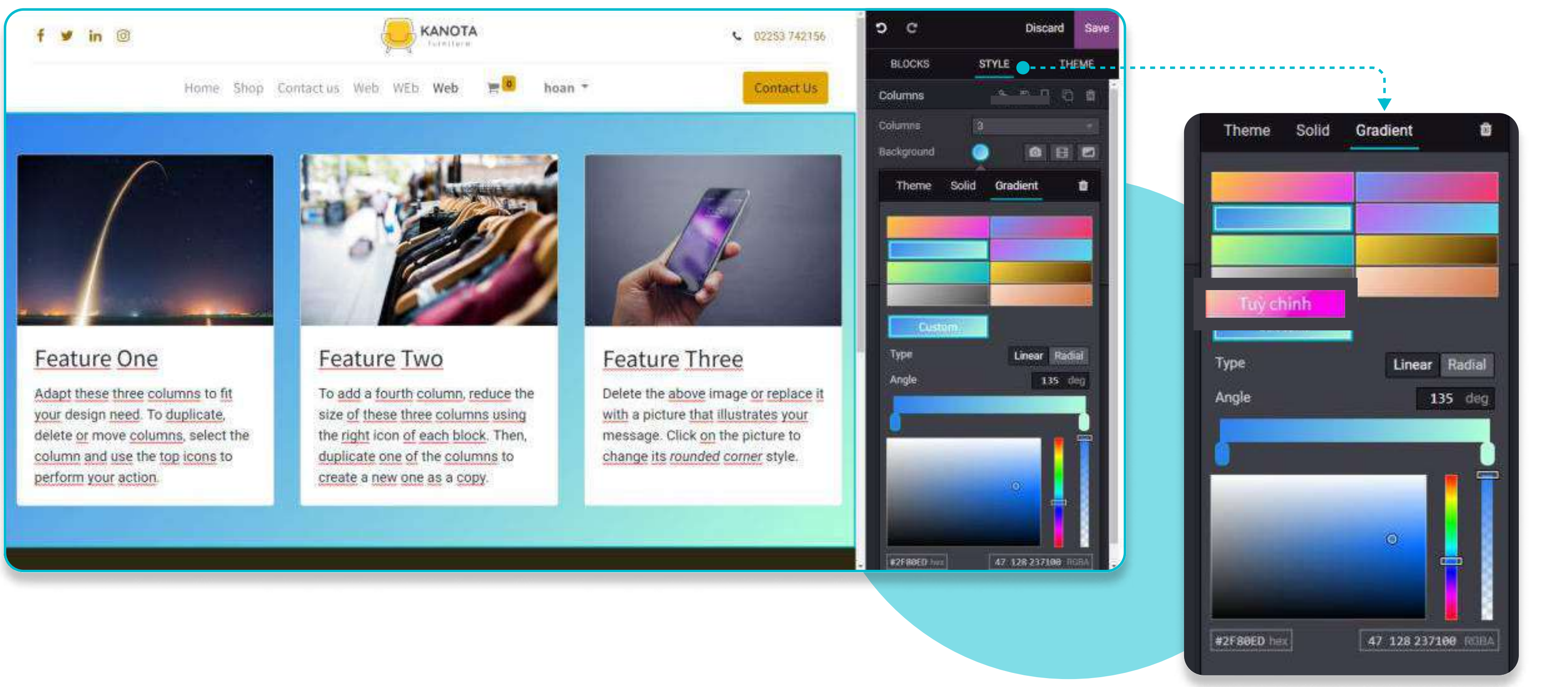
Create web page content

Using content blocks

Drag and drop the existing content blocks provided by Viindoo to quickly start building content for your web page without having any coding knowledge.



You can *resize, move, duplicate*, and *delete* a block of content by clicking on the said block and using the directional arrows.

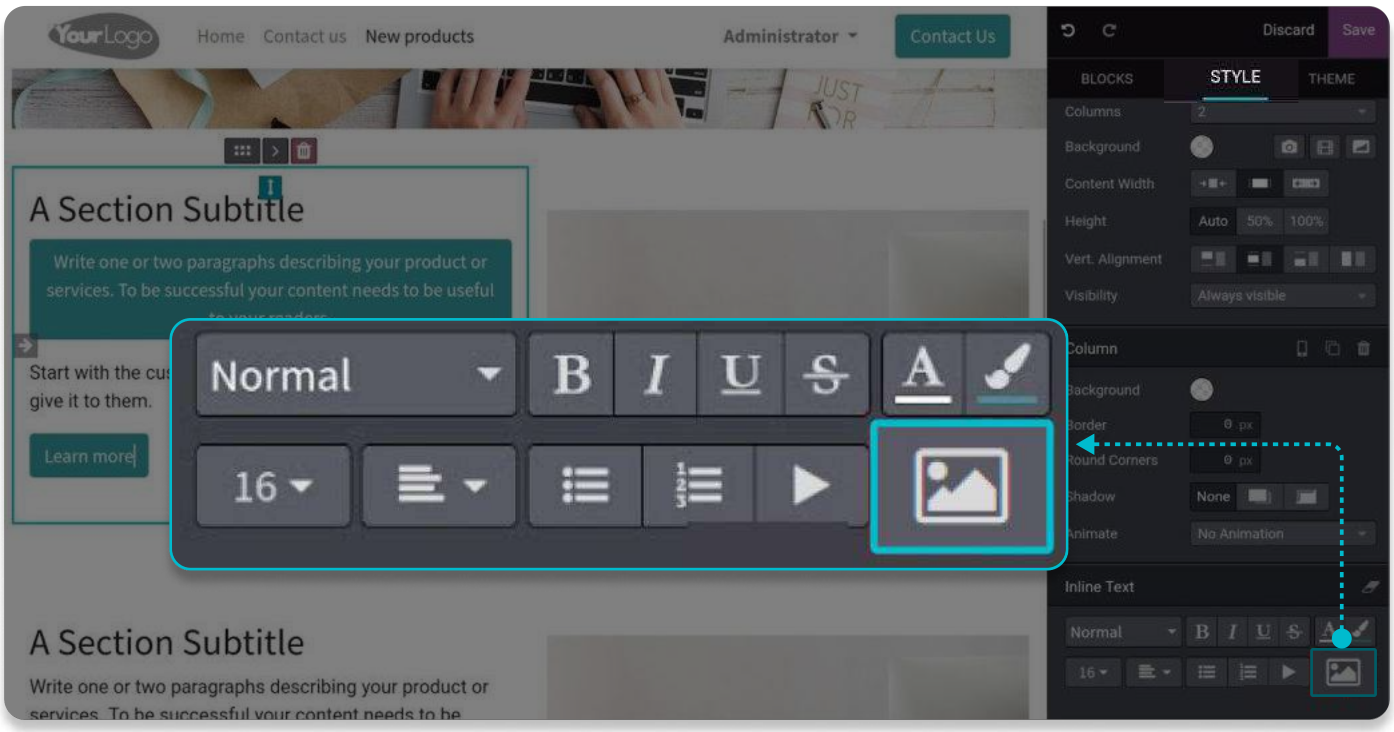


On the other hand, you can change the background color of each content block by going to the **Style** tab, selecting the background type (**Solid** or **Gradient**), then selecting an existing color or pressing **Custom** to create a new one.

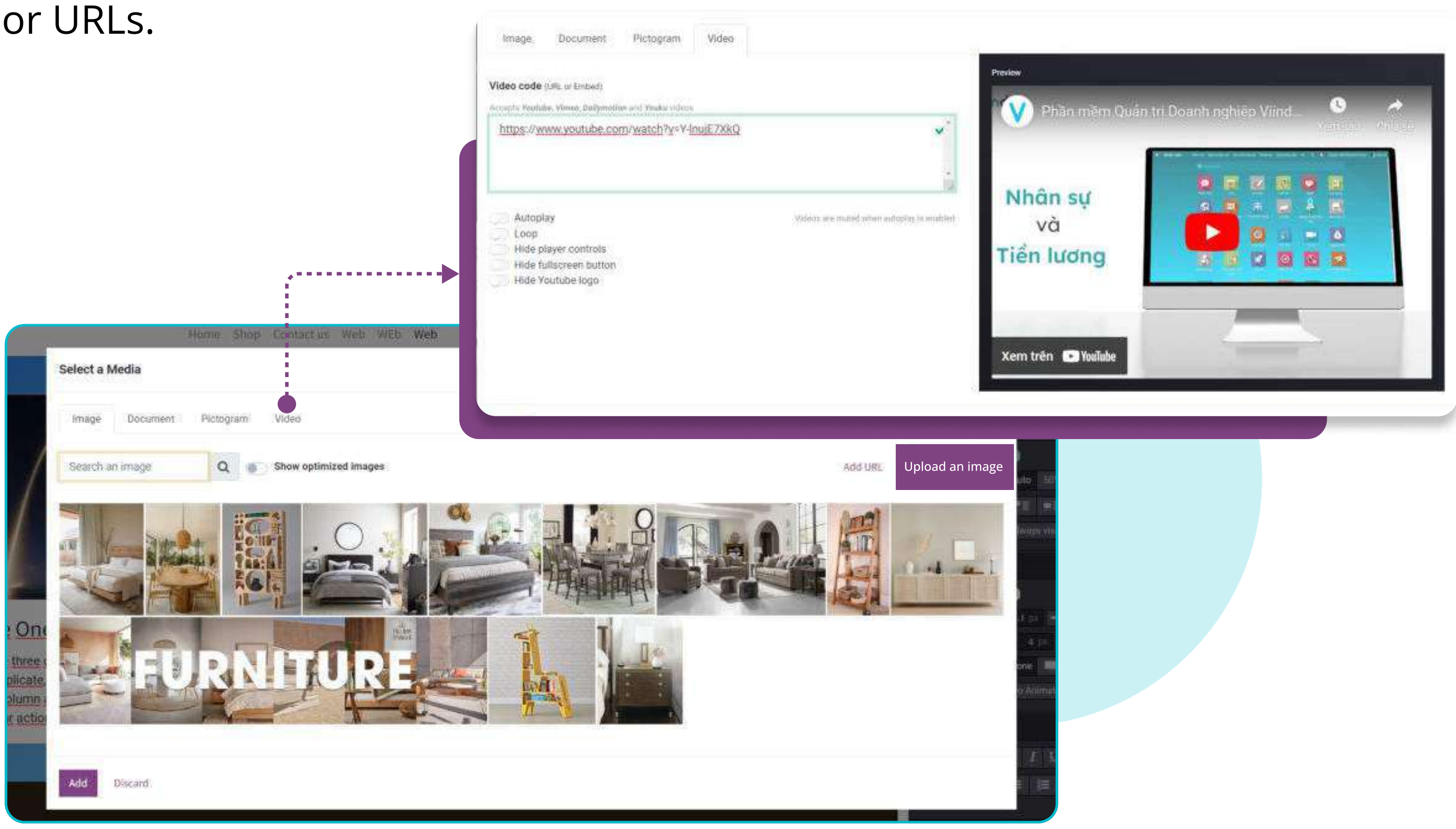
Insert an image, or video into a webpage

To insert media such as images, documents, video to a page, do as follows:

Step 1: On the Edit Master, select the content block where you want to add a certain media, and navigate to **Style ‣ File/Image:**



Step 2: On the pop-up window, select and upload your media files, such as images or URLs.



You can also configure the video display settings on your website according to your needs.

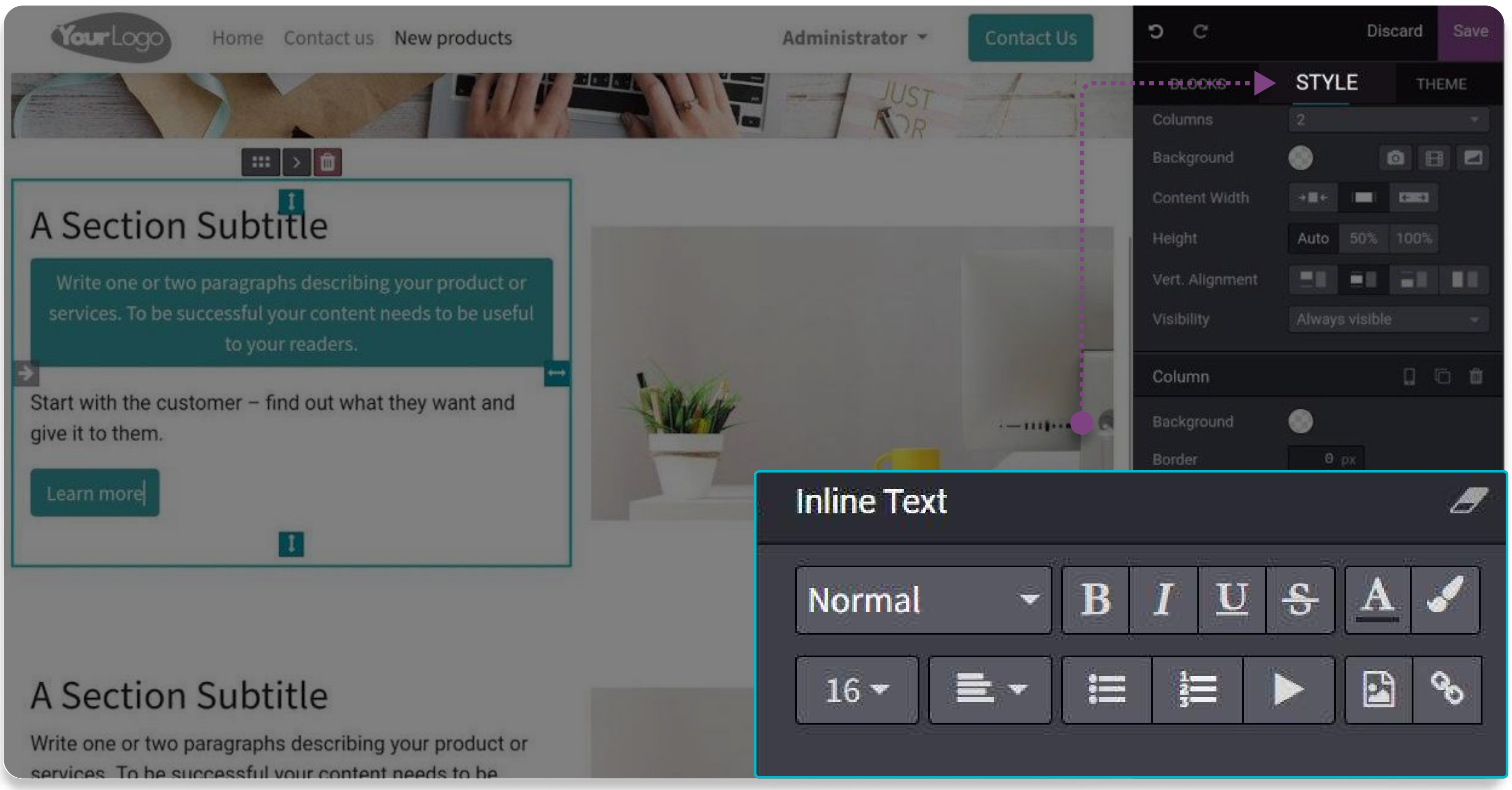
➡ See details at:

- *How to create and design a new webpage on Website*.

Edit content

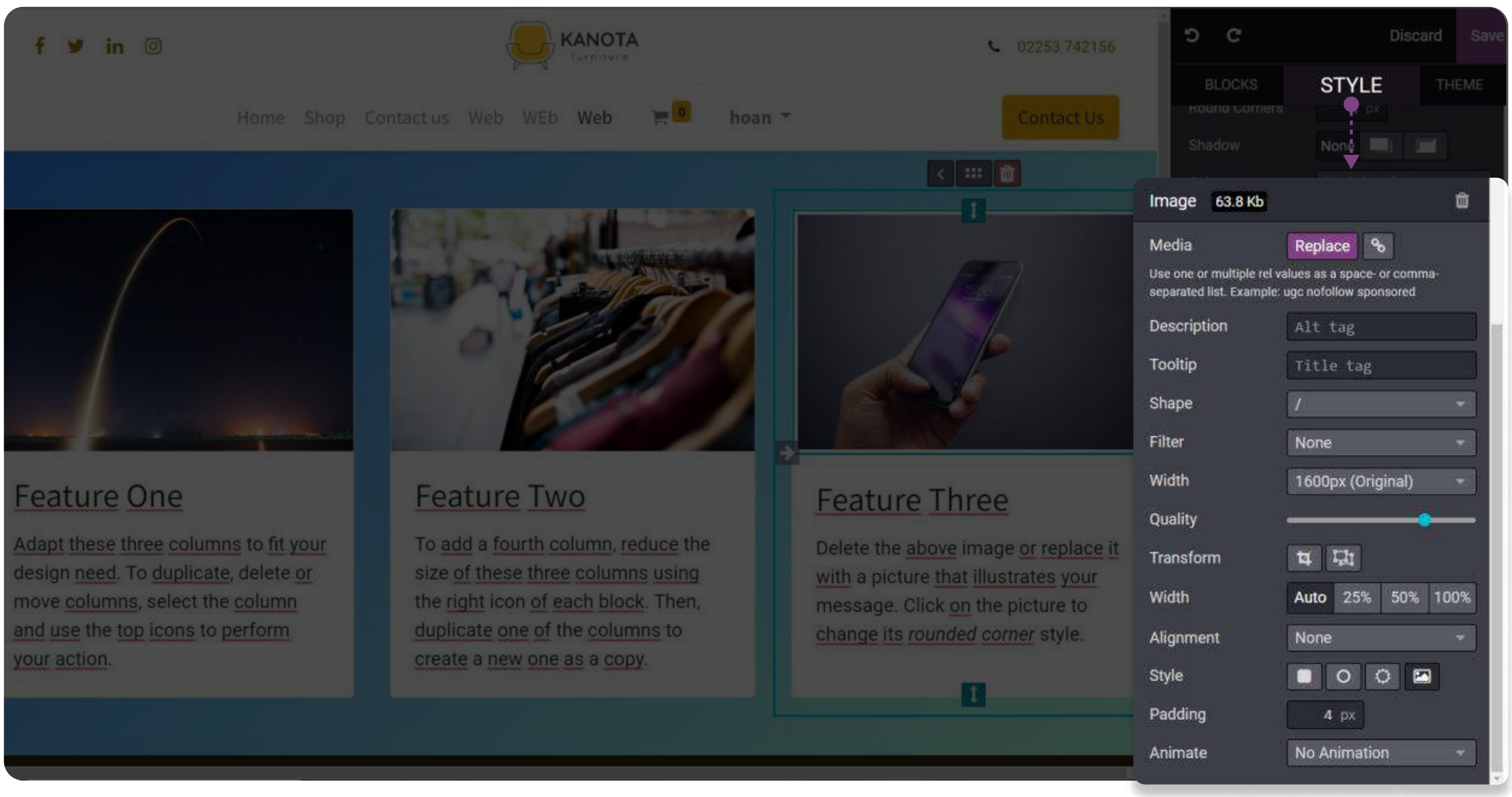
Edit text content

Select the text you want to edit to activate the text editor at **Style ‣ Inline Text.** From here, you can choose different formats to apply to your text content:



Edit images

Click on the image you want to edit to activate the image editor at **Style ‣ Image.** From here, you can adjust image parameters such as size, shape, quality, etc.



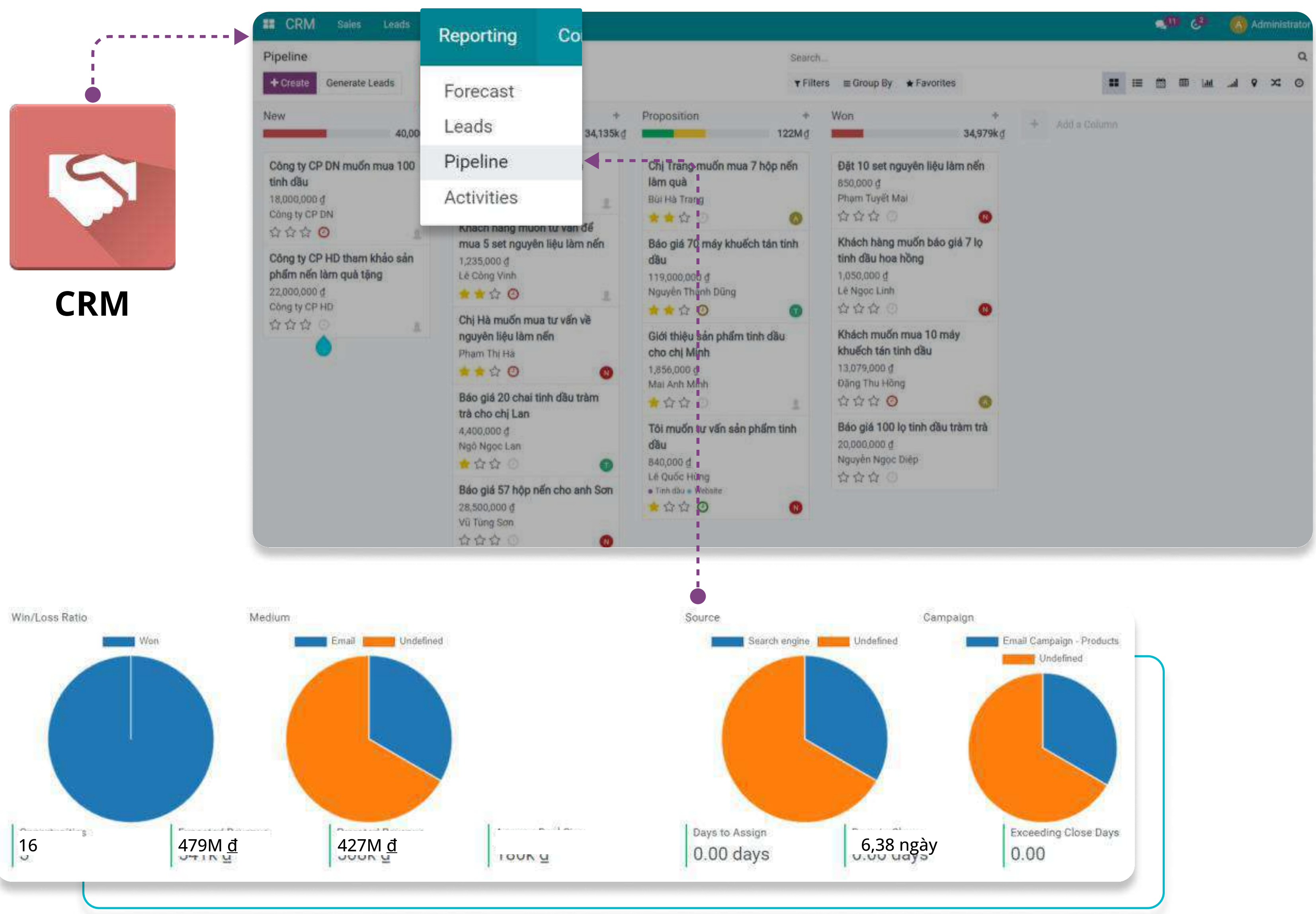
VISUAL REPORTS OF BUSINESS PERFORMANCE

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.

COMMONLY USED REPORTS

Opportunity analysis report

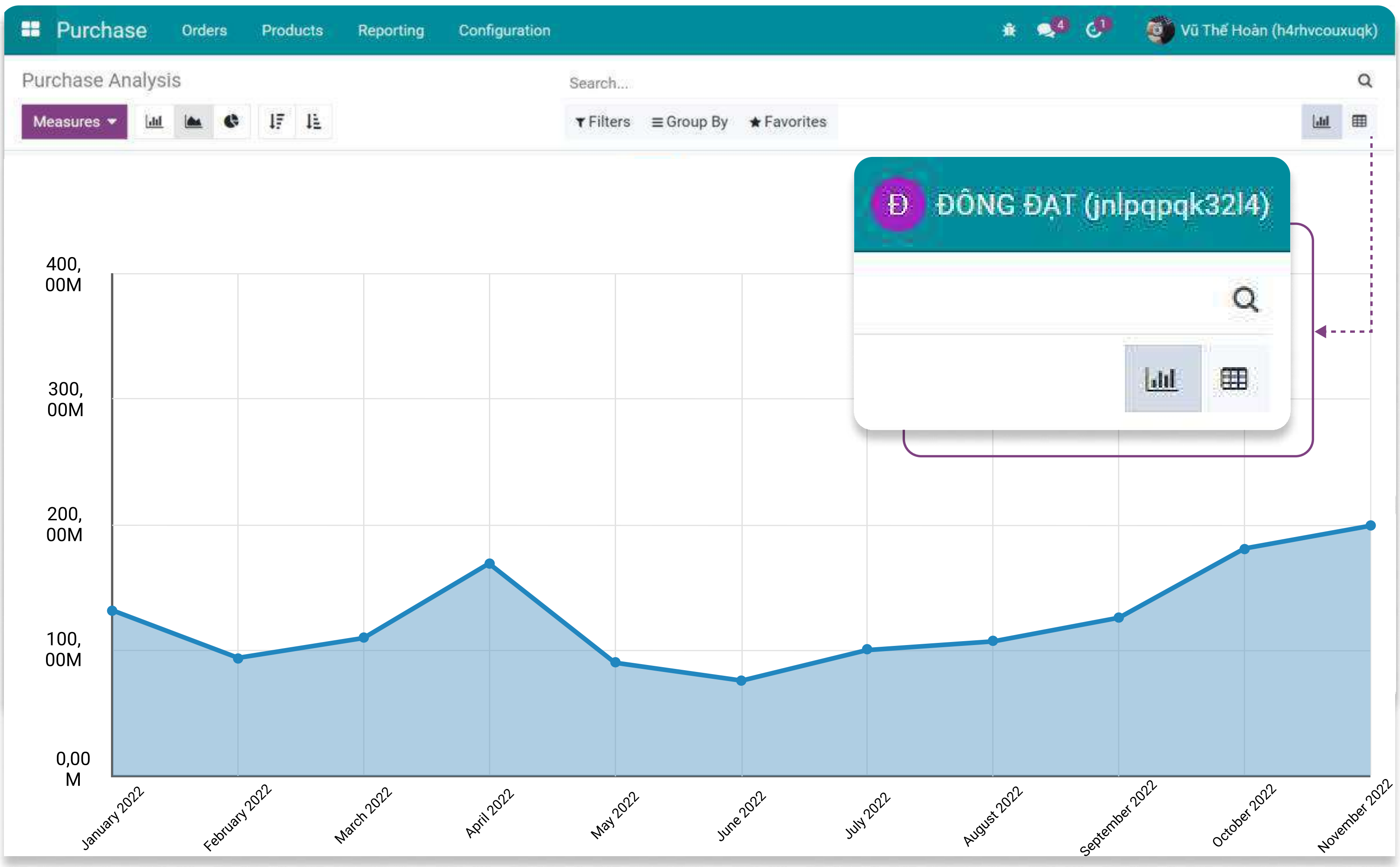
To view the lead/opportunity analysis report, navigate to **CRM ‣ Reporting ‣ Pipeline.**



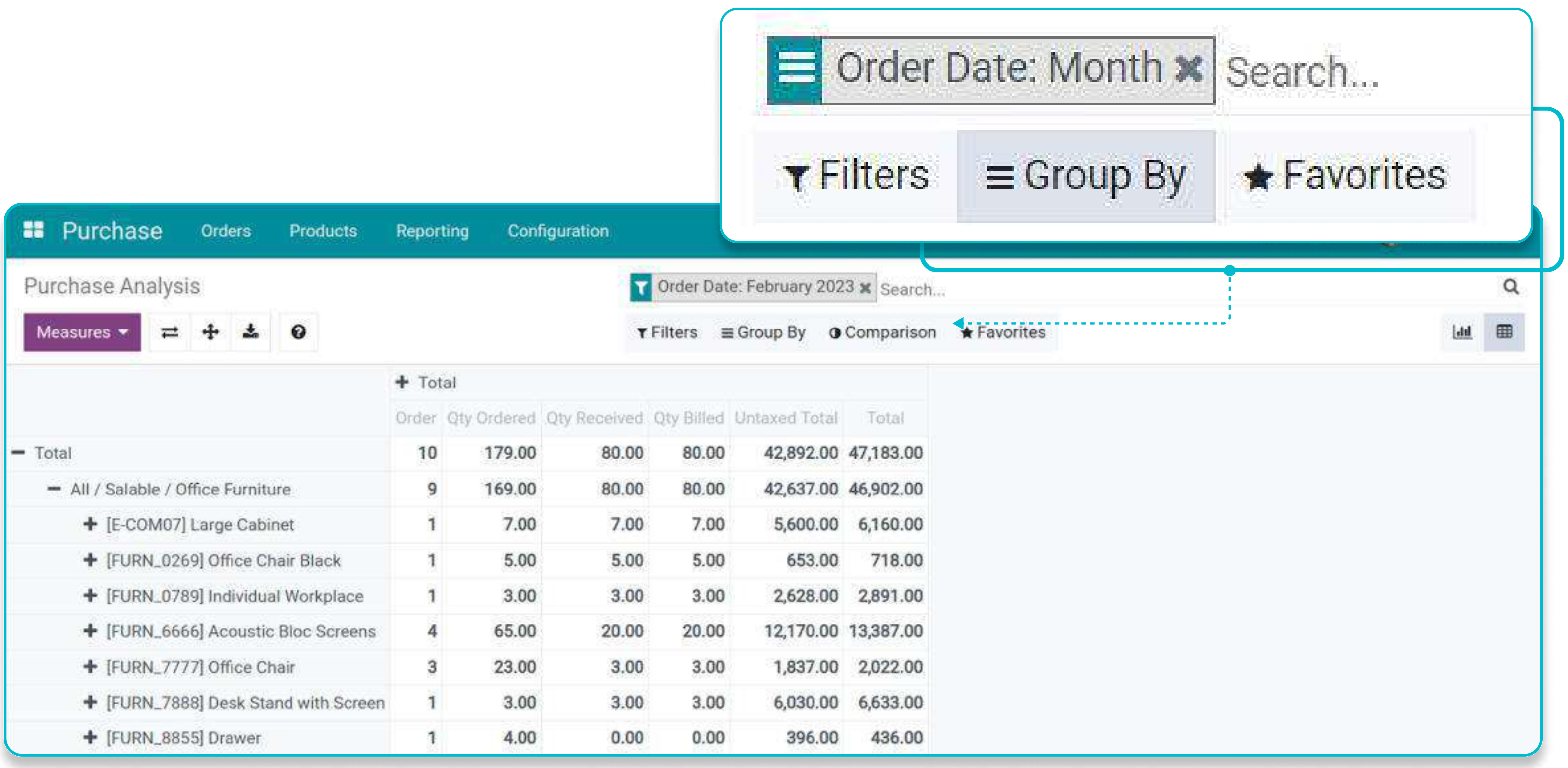
The opportunity analysis report is a tool to help track metrics related to customer service, the number of opportunities, expected revenue, success rate, etc. You can view the information in this report in the form of a graph or a breakdown (pivot).

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.

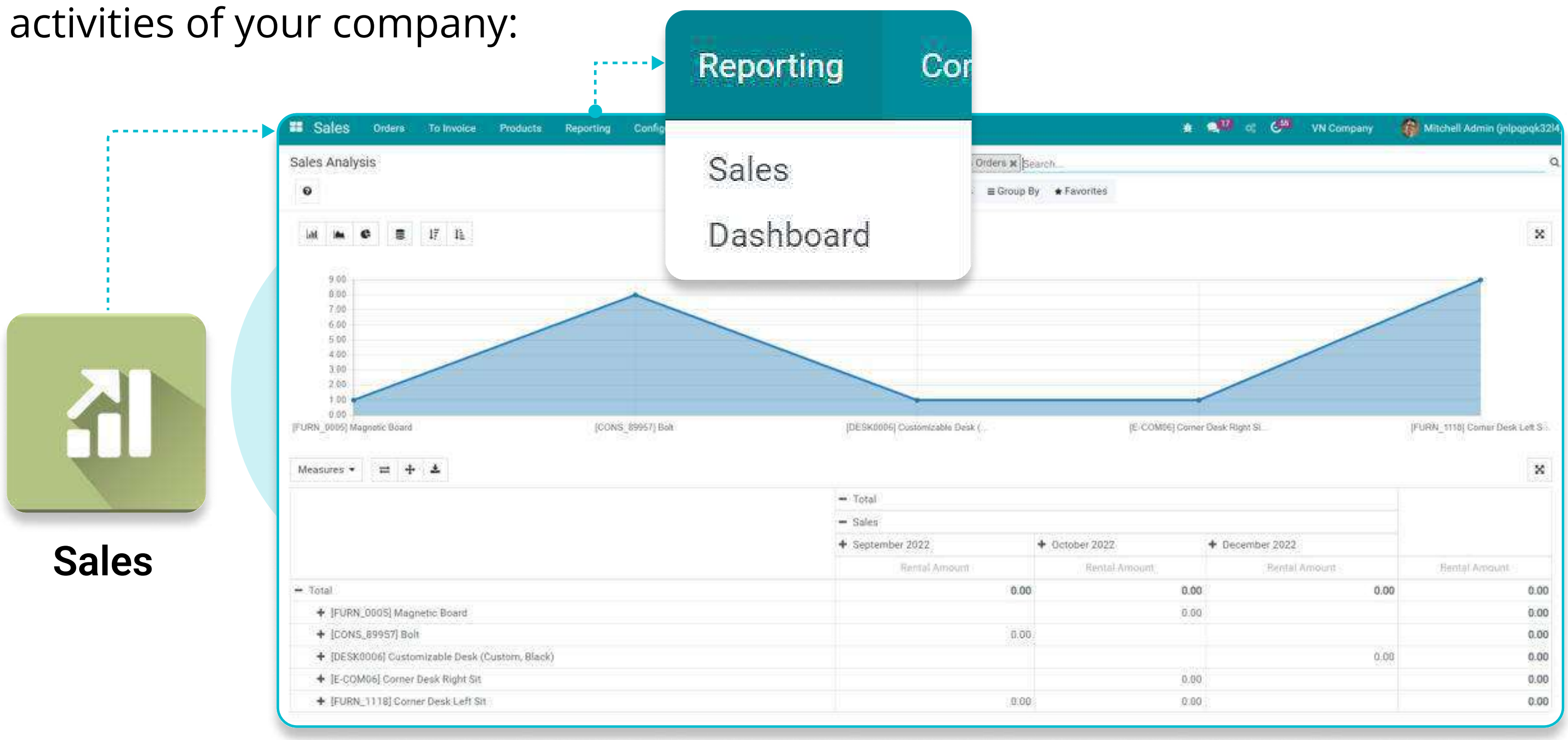


	Order	Qty Ordered	Qty Received	Qty Billed	Untaxed Total	Total
− Total	10	179.00	80.00	80.00	42,892.00	47,183.00
− All / Salable / Office Furniture	9	169.00	80.00	80.00	42,637.00	46,902.00
+ [E-COM07] Large Cabinet	1	7.00	7.00	7.00	5,600.00	6,160.00
+ [FURN_0269] Office Chair Black	1	5.00	5.00	5.00	653.00	718.00
+ [FURN_0789] Individual Workplace	1	3.00	3.00	3.00	2,628.00	2,891.00
+ [FURN_6666] Acoustic Bloc Screens	4	65.00	20.00	20.00	12,170.00	13,387.00
+ [FURN_7777] Office Chair	3	23.00	3.00	3.00	1,837.00	2,022.00
+ [FURN_7888] Desk Stand with Screen	1	3.00	3.00	3.00	6,030.00	6,633.00
+ [FURN_8855] Drawer	1	4.00	0.00	0.00	396.00	436.00

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:

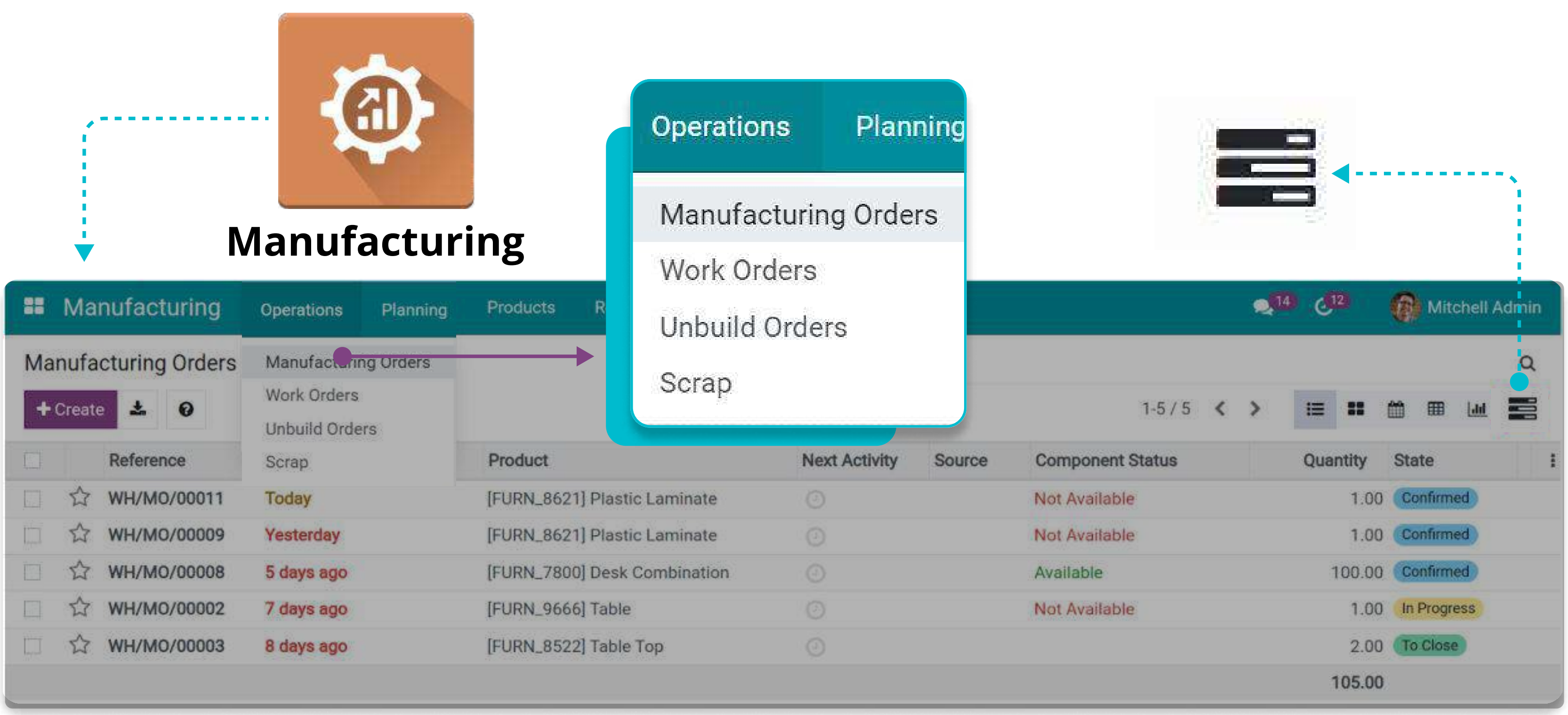


You use tools such as filtering, and grouping to filter out information about the sales activities such as the number of customers, and the generated revenue in the month.

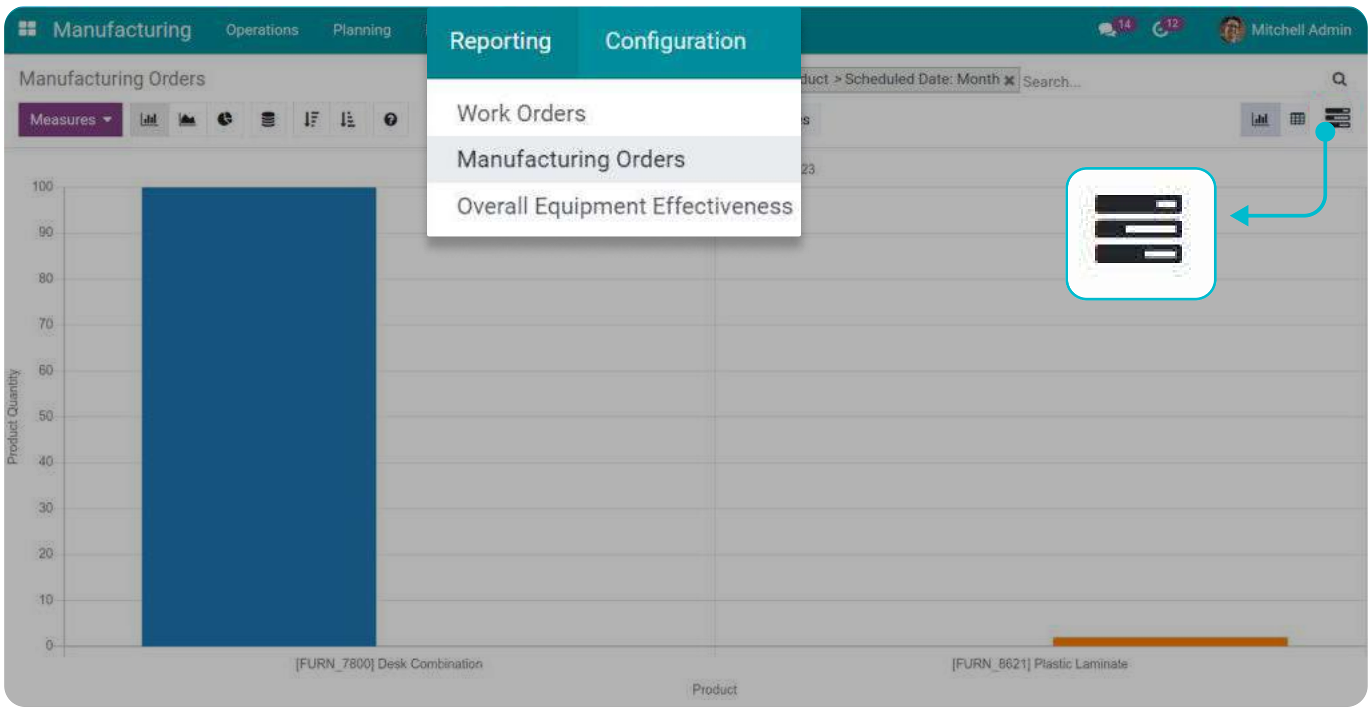
Manufacturing report

The system makes it easy to track the manufacturing activities and progress as Gantt charts in 2 methods.

Method 1: Go to **Manufacturing ‣ Operations ‣ Manufacturing Orders**, and select the Gantt icon in the right corner of the screen.

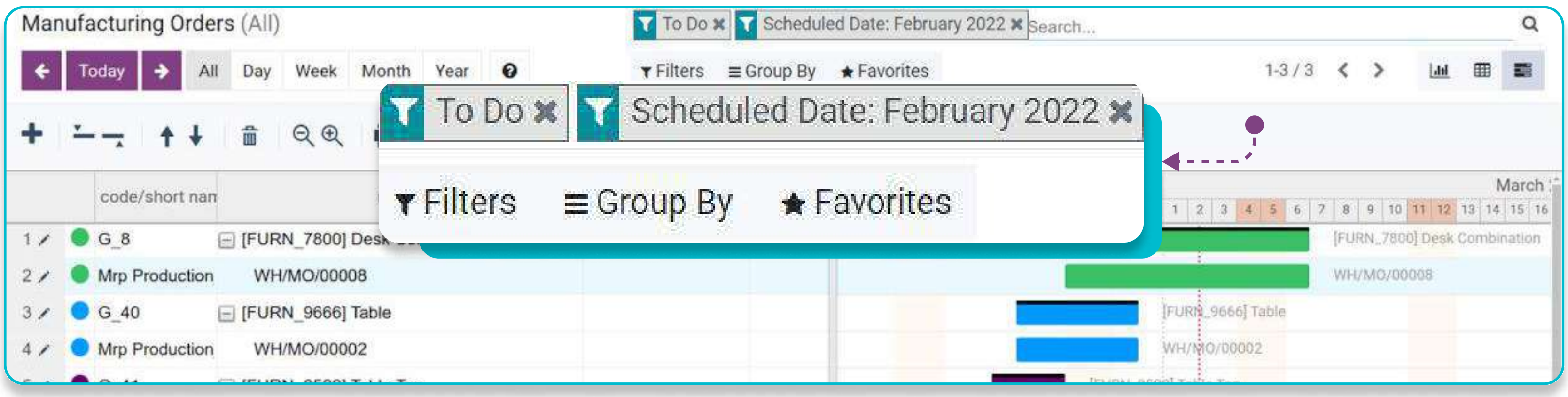


Method 2: Go to **Manufacturing ‣ Reporting ‣ Manufacturing Orders**, and select the Gantt icon in the right corner of the screen.



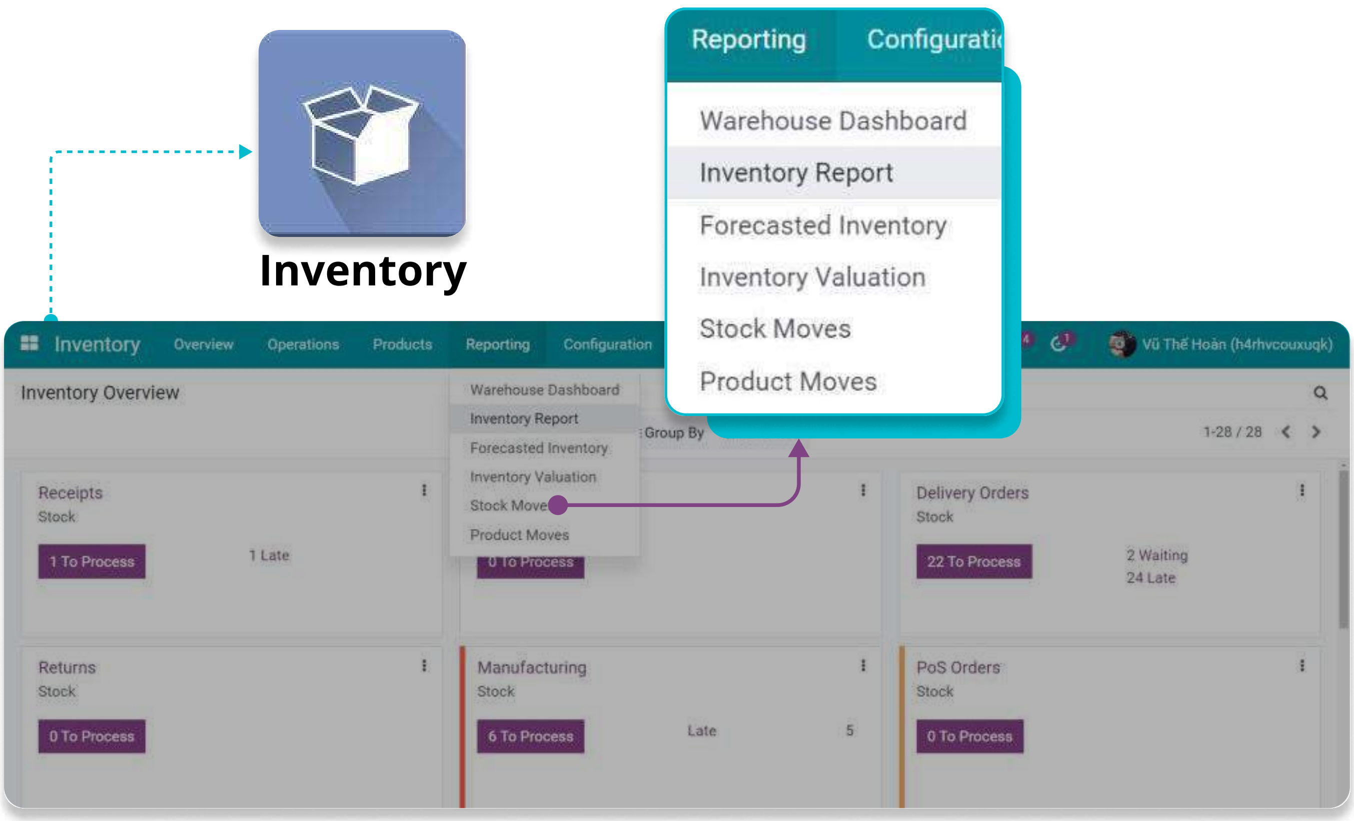
You will be redirected to the Gantt chart interface with information about the production progress.

Here, you use the filter and grouping tools to filter out the needed information such as the progress of manufacturing orders processed in a specific month

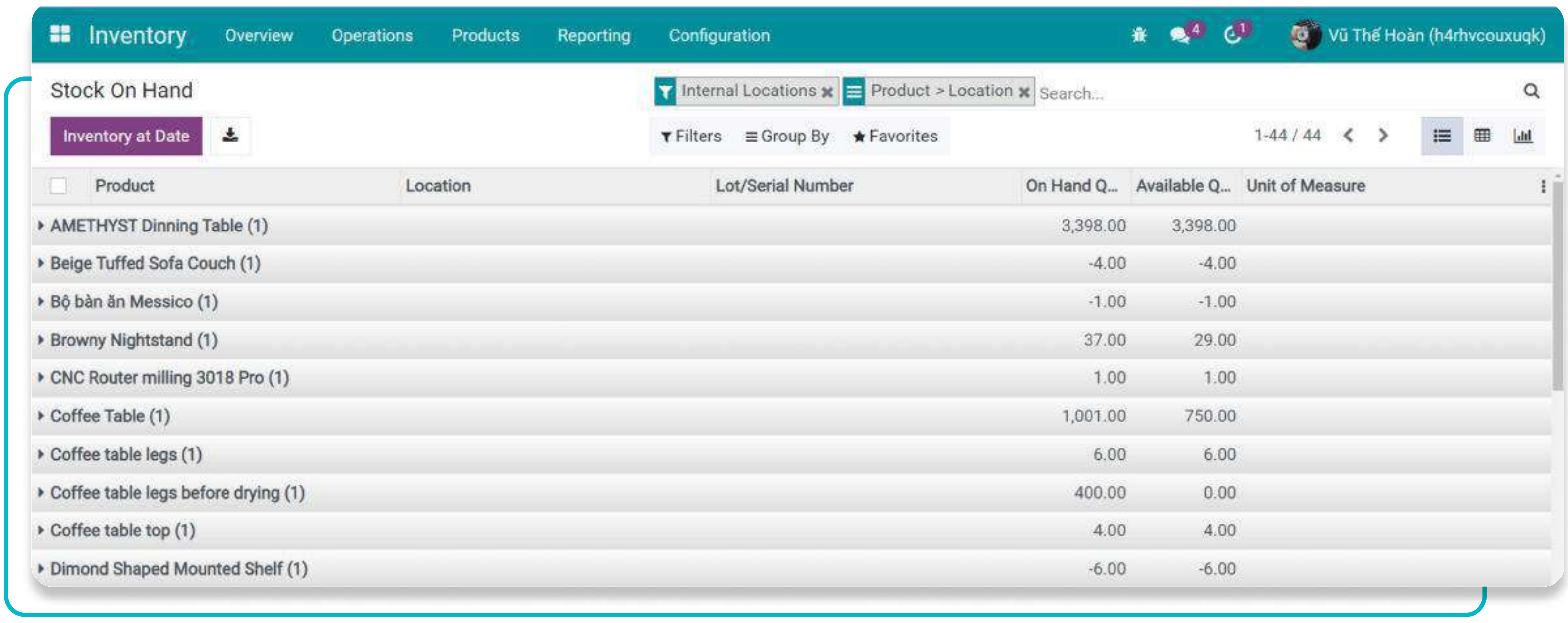


Inventory report

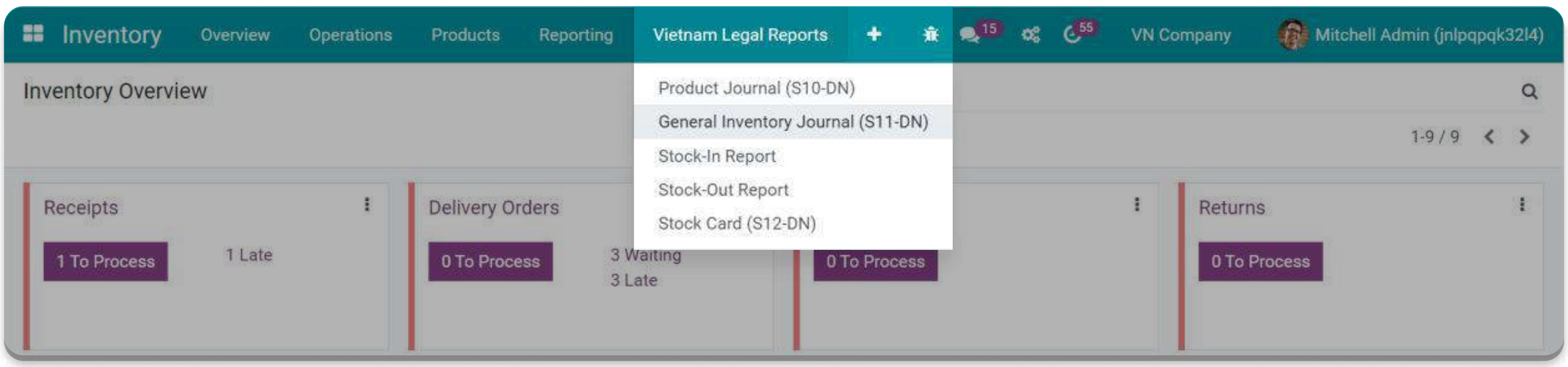
Go to **Inventory ‣ Reporting ‣ Inventory Report:**



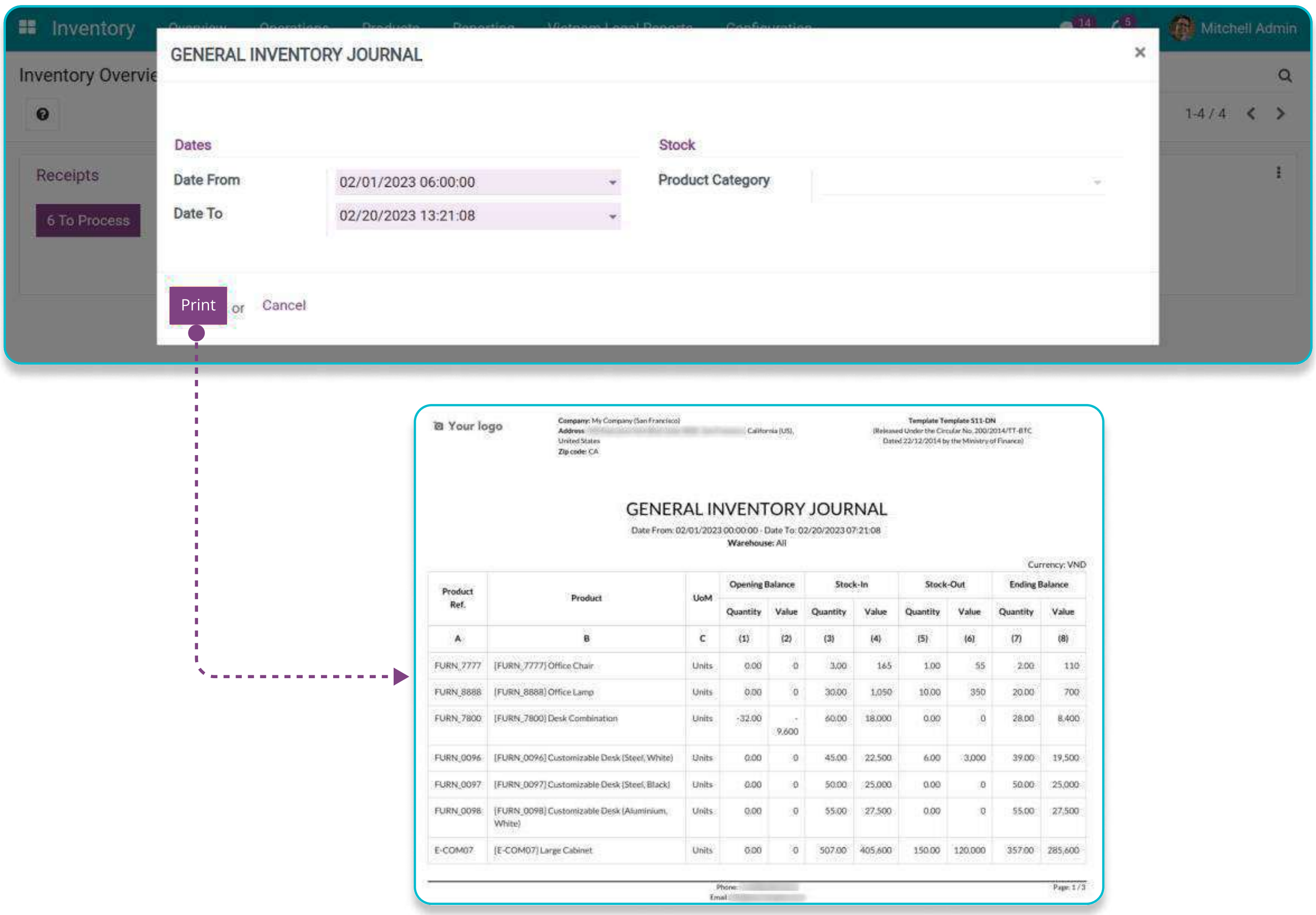
Here, you can view the inventory data of each product on each warehouse location updated instantly:



Or you can go to **Inventory ‣ Vietnam Legal Reports ‣ General Inventory Journal (S11-DN)** to view General Inventory Journal in accordance with the Vietnamese Accounting Standard:

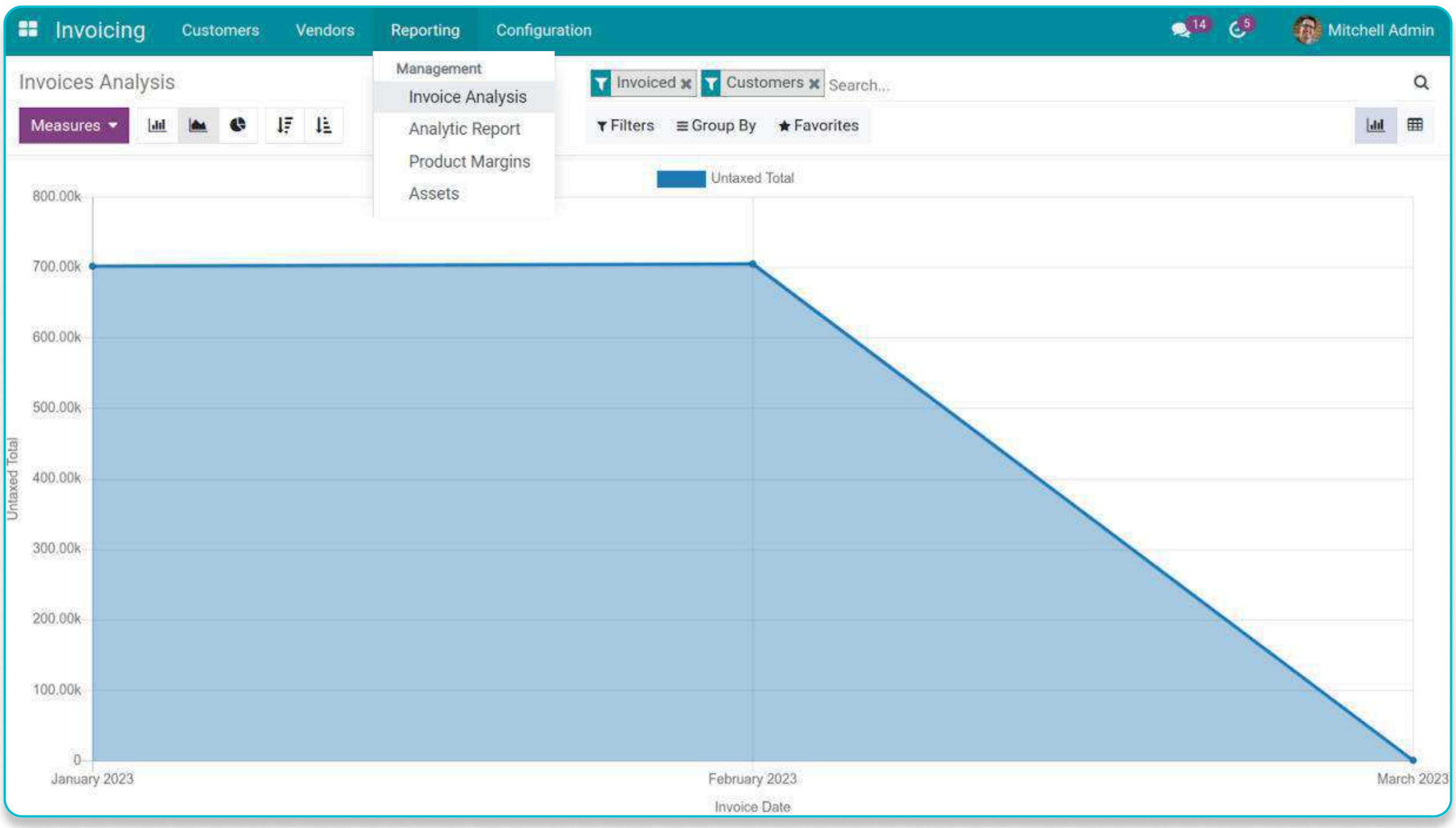


Enter the period to report, then press **Print** to view the report in PDF format:

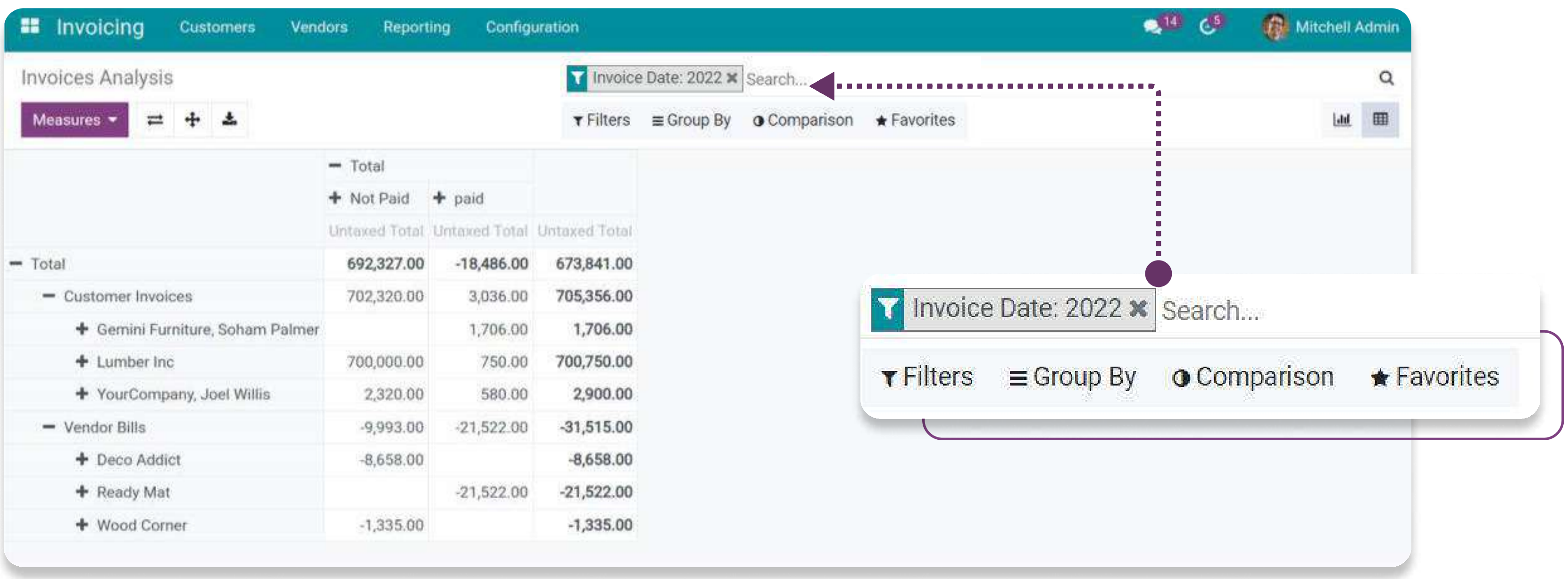


Payables and Receivables report

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.

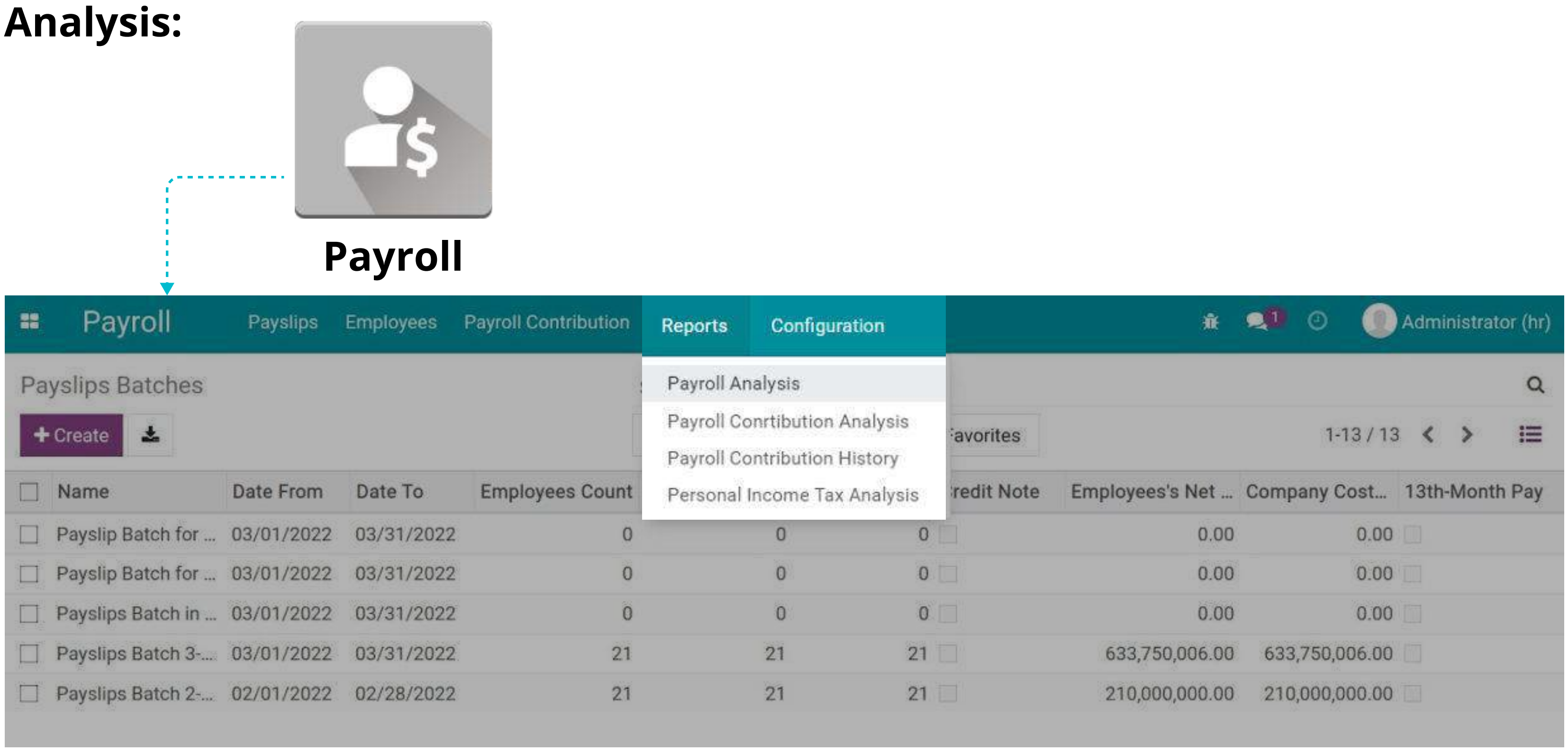


You can use **Measure** and tools such as filtering and grouping to filter out the interest information such as receivables and payables arising in the month with each partner, paid and unpaid amounts, etc.

Payroll analysis report

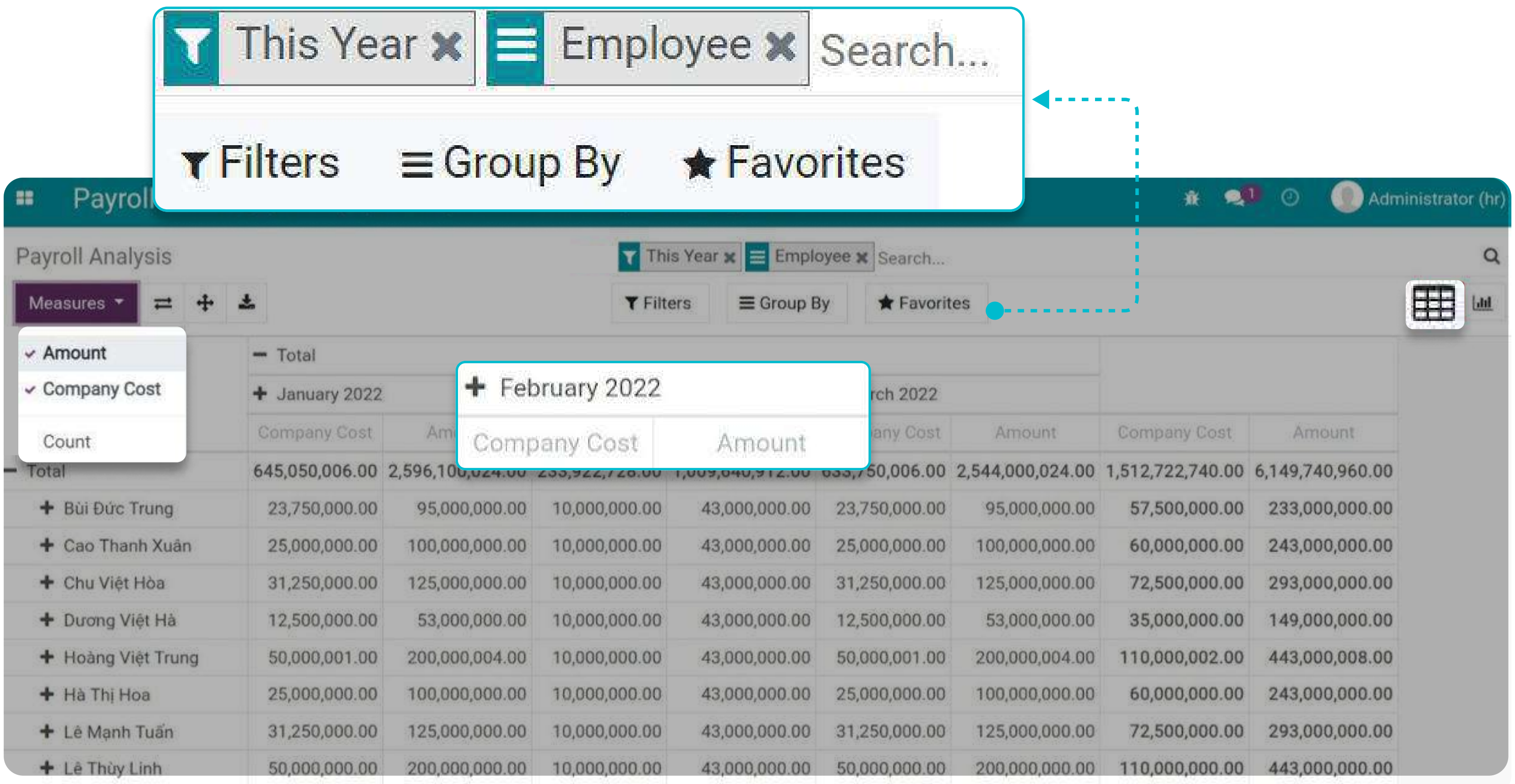
The **Payroll Analysis** report gives you an overall picture of the salary, bonus, and expenses in the company according to monthly and yearly analysis data. Viindoo supports you with flexible payroll analysis reports from pivot analysis to visual graphs over time, etc.

To view the payroll analysis report, navigate to **Payroll ‣ Reports ‣ Payroll Analysis:**

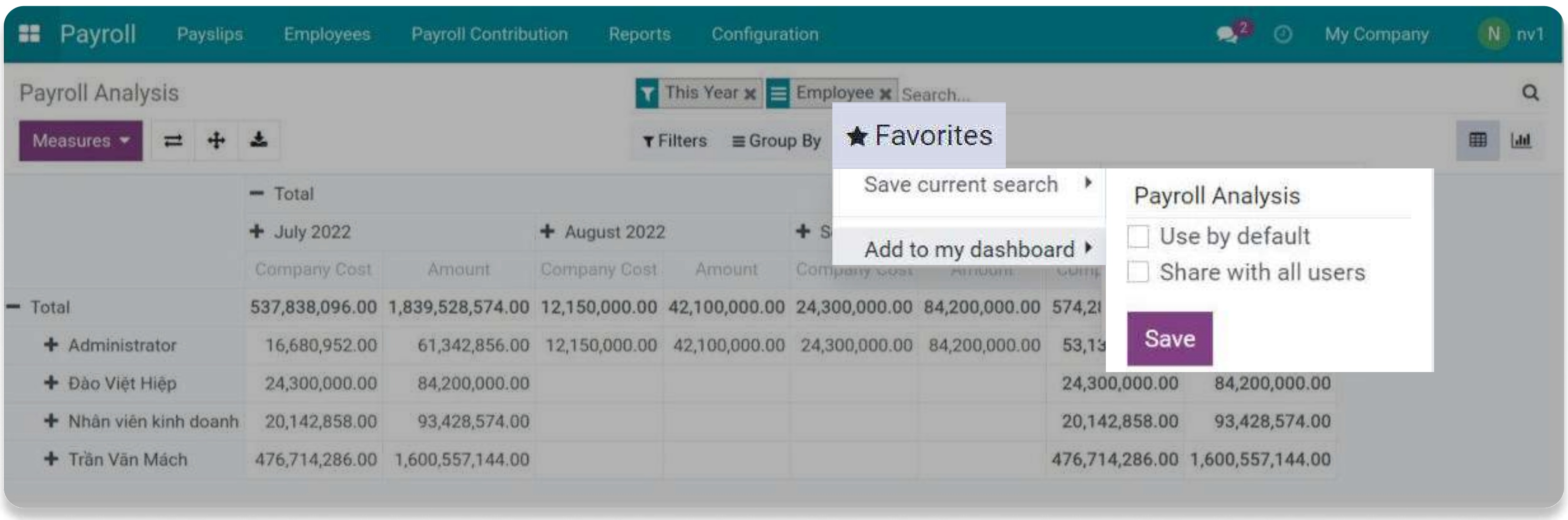


By default, the Payroll Analysis report is displayed in pivot view, which allows you to analyze the Company Cost and Total Amount data.

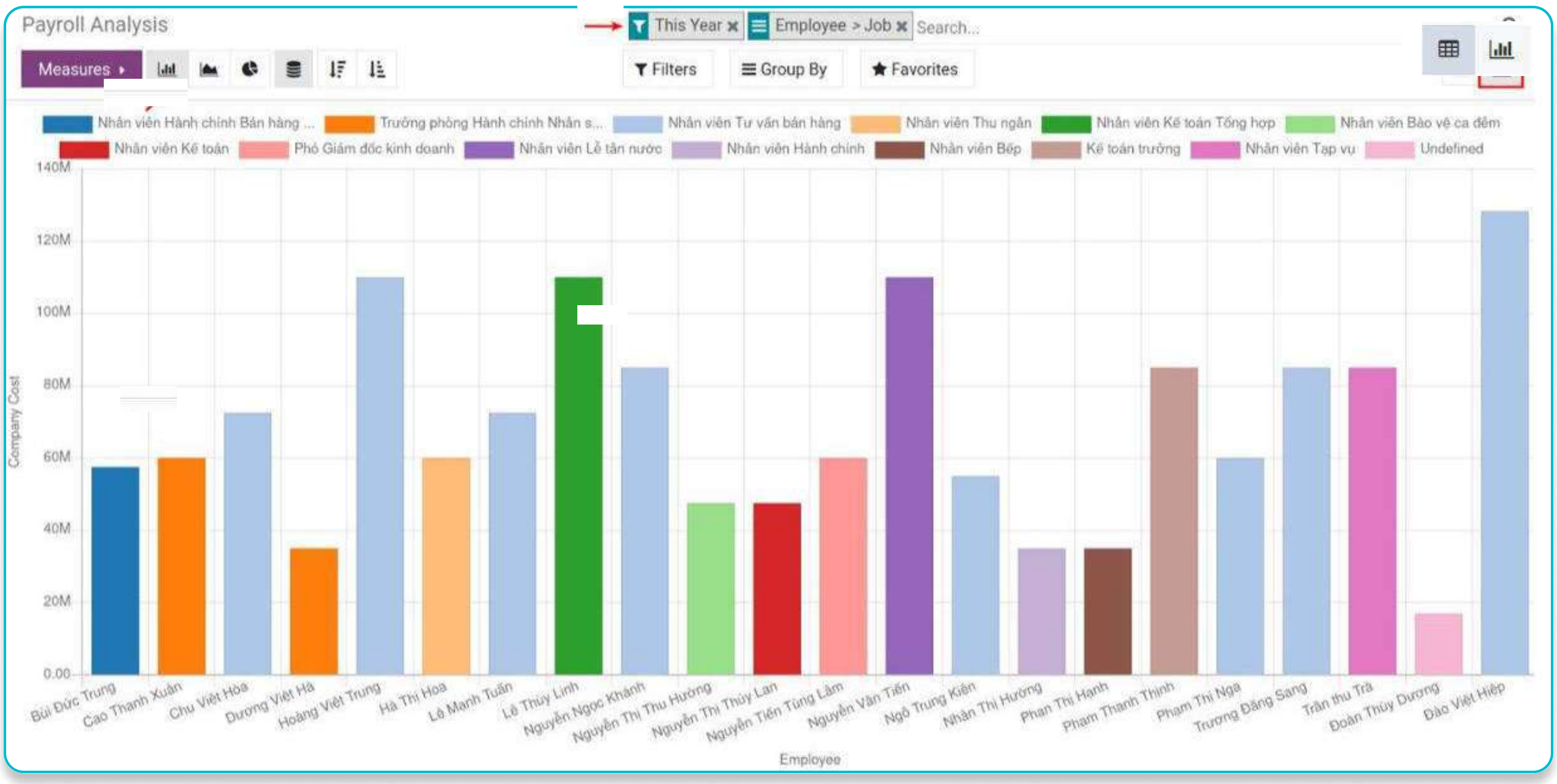
Select reporting criteria according to your needs by using the filters or grouping tools. You can group by employees to view salary cost reports for each employee, or group by job positions to analyze salary costs for each job position, etc.



Also, save this report template using the Favorites filter to use them later or share it with other users in the system:



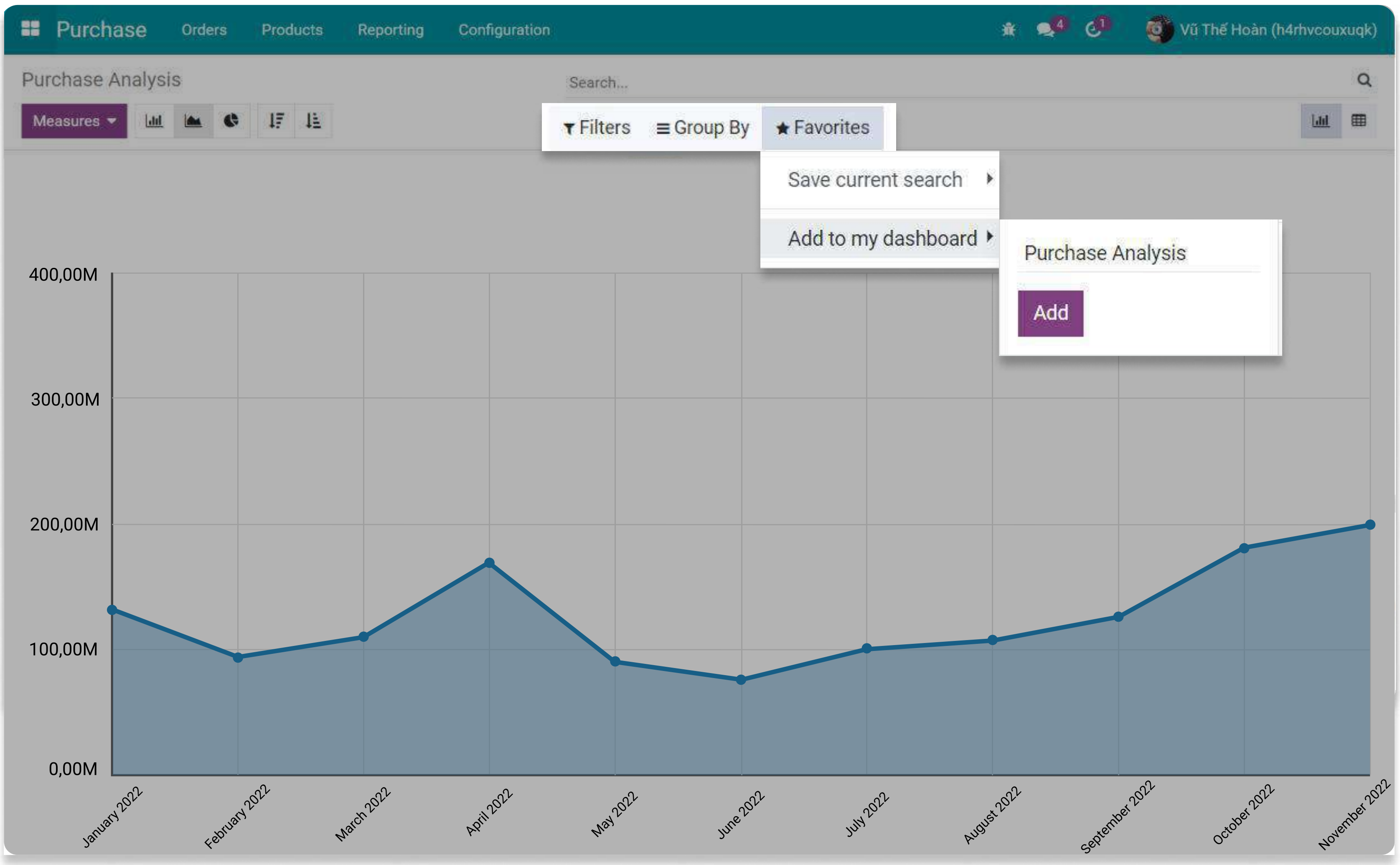
Besides, you can also display this report in graph view for an overview.



BUILD YOUR DASHBOARD

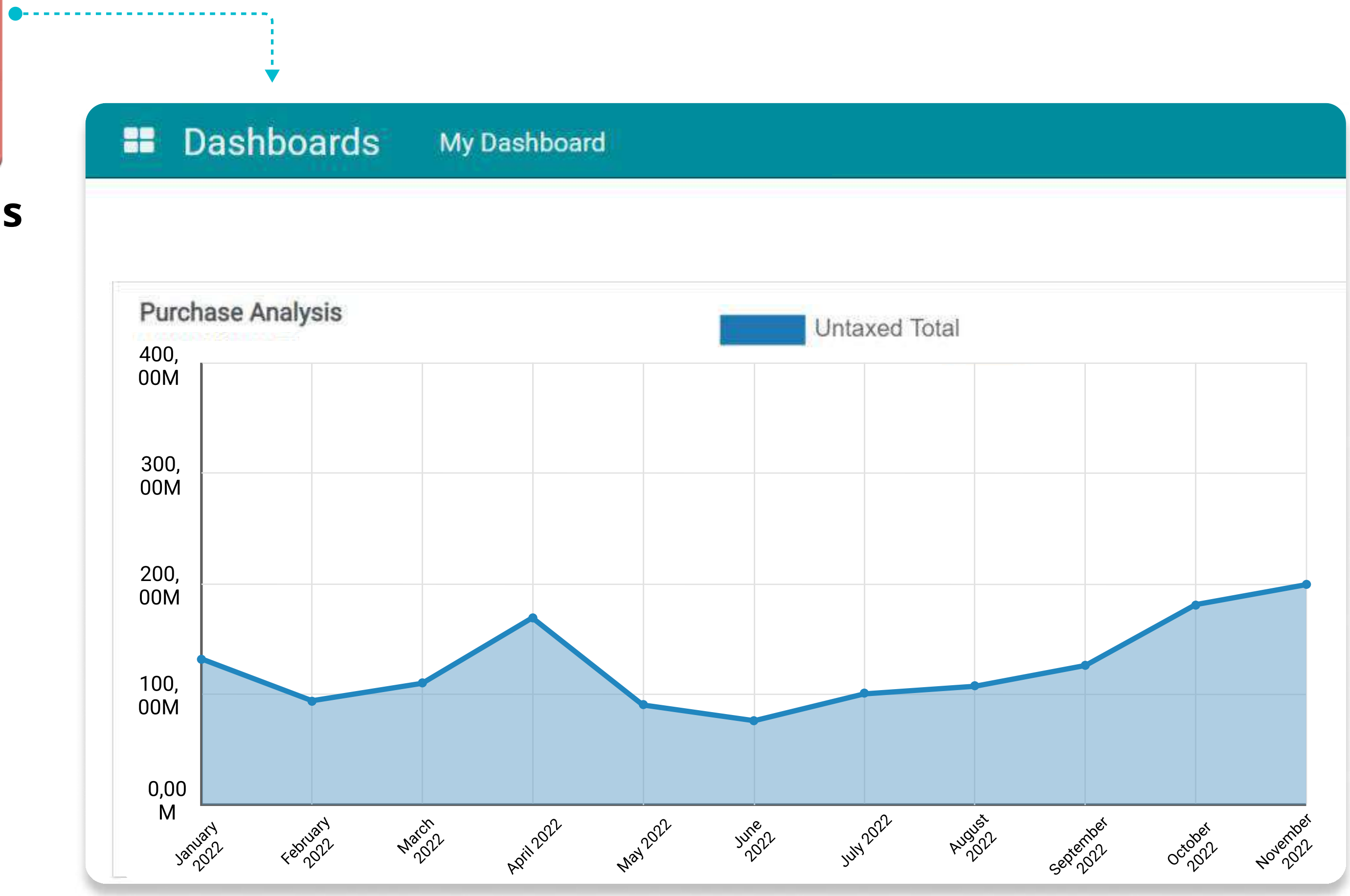
Managers can build a dashboard that includes the reports that they need to view daily to save time.

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 Dashboard application. The data in this dashboard will be updated continuously.

Dashboards



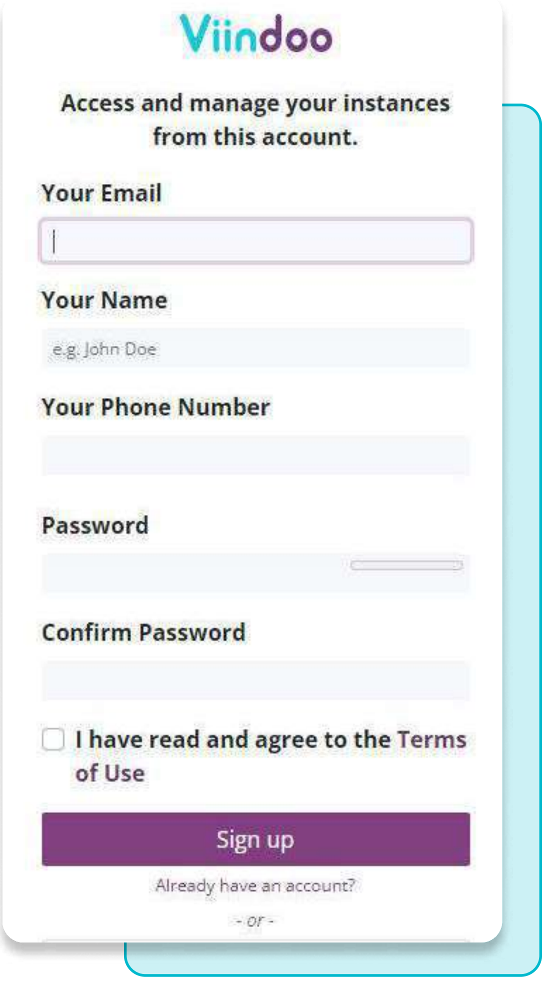
GUIDELINES CONTACT SUPPORT

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:

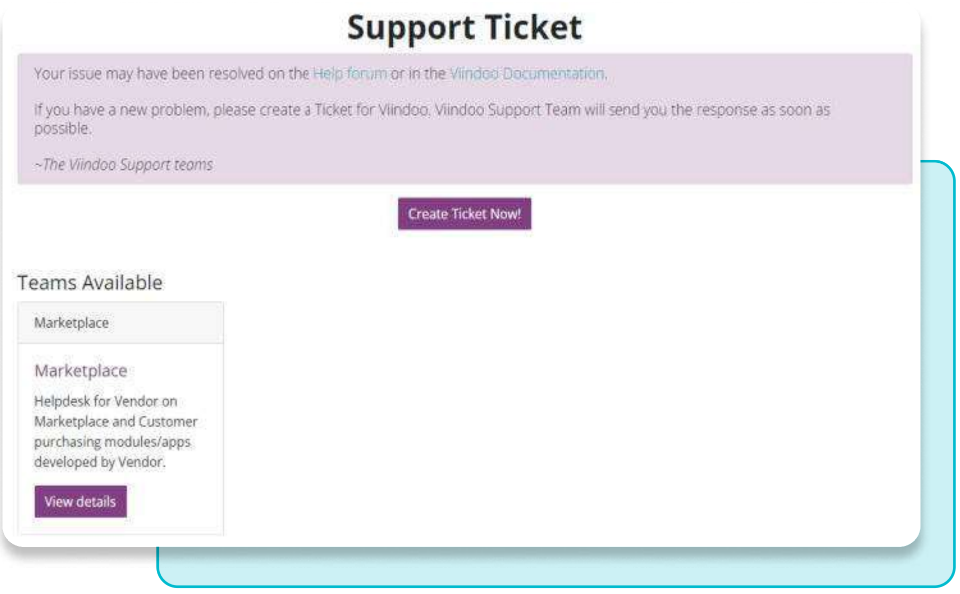
- *Forum*.
- *User Documentation*.



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.



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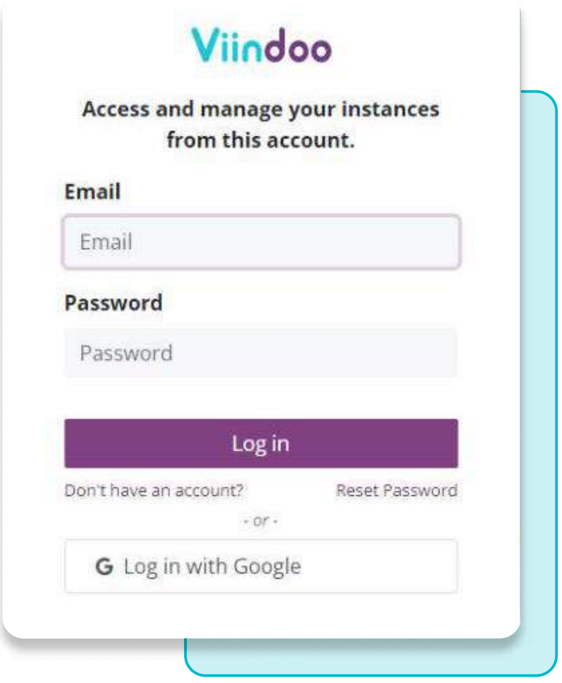
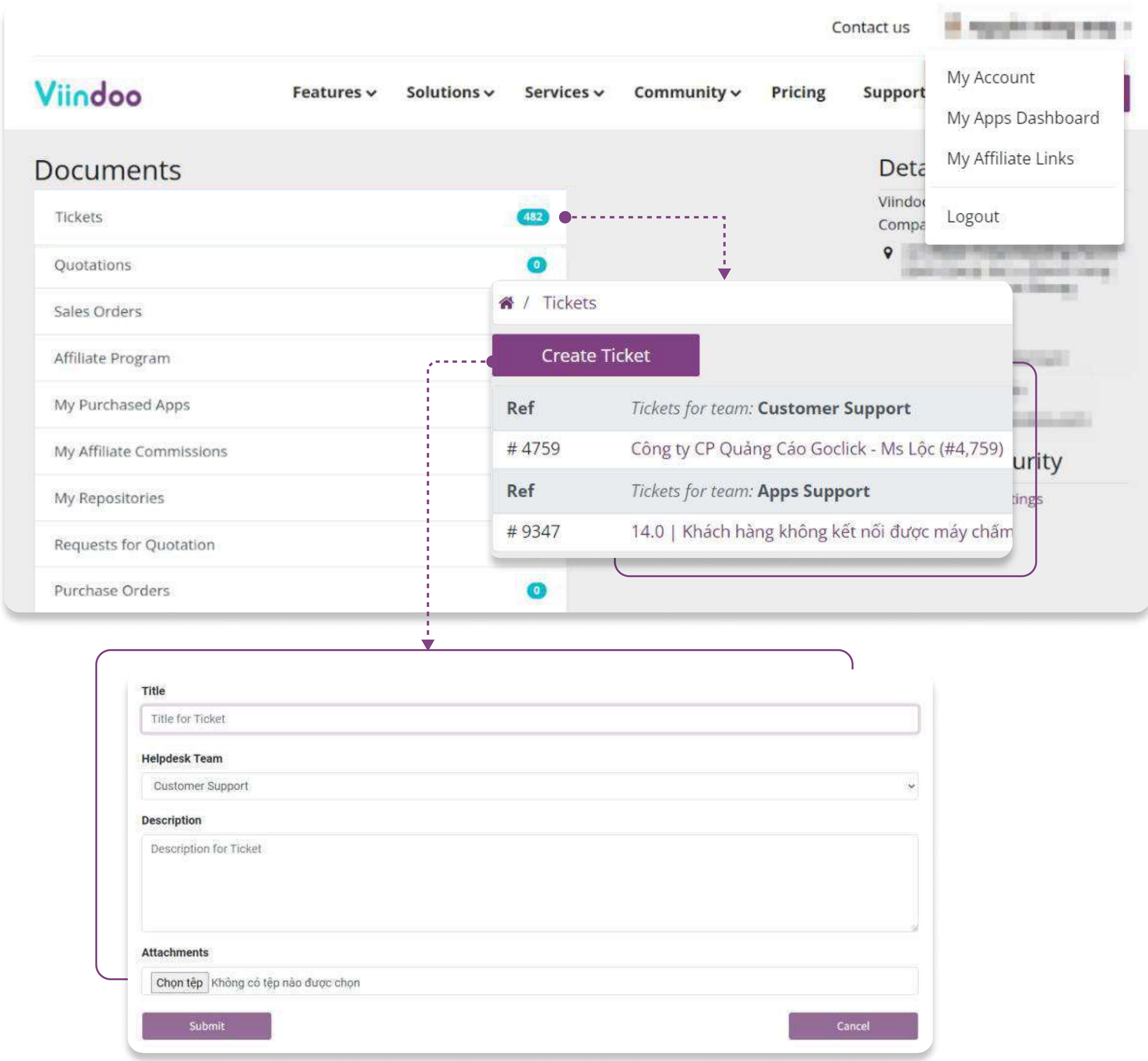


2

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

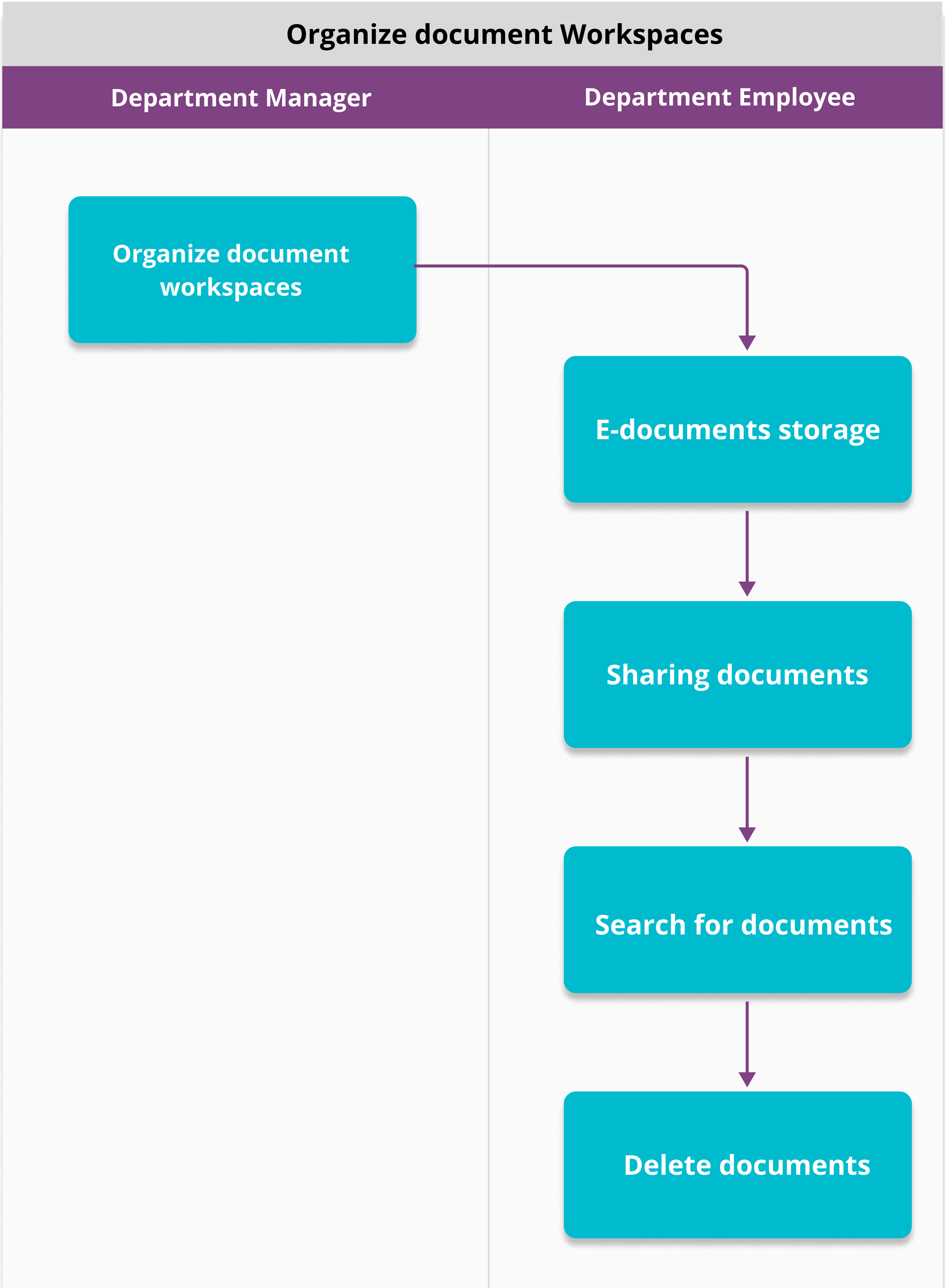
In order to support you as fast as possible, you should provide Viindoo with all the basic information on your support ticket request using the following template:

- **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.

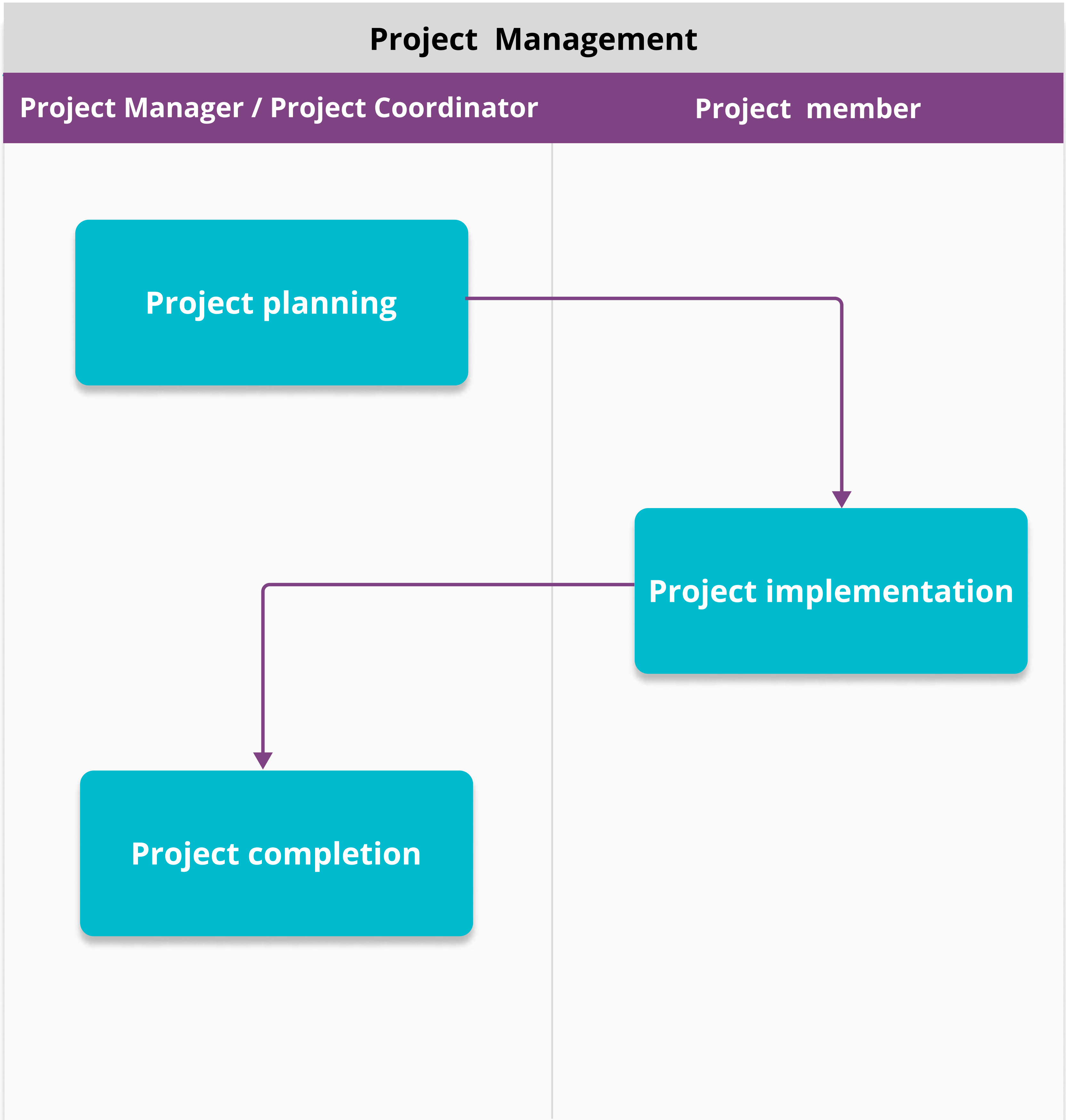
APPENDIX:

WORK PROCESS BY JOB POSITION

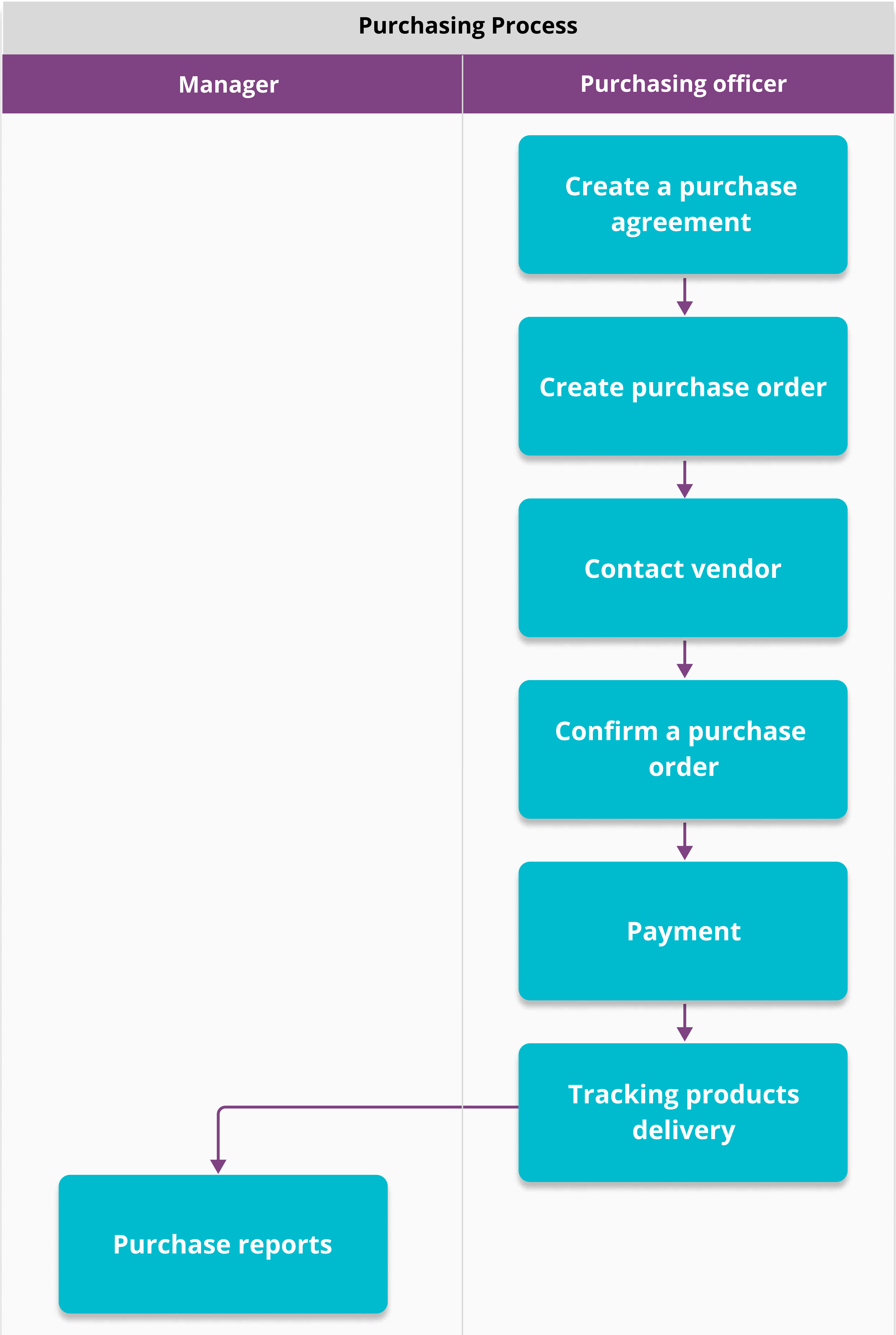
ORGANIZE DOCUMENT WORKSPACES



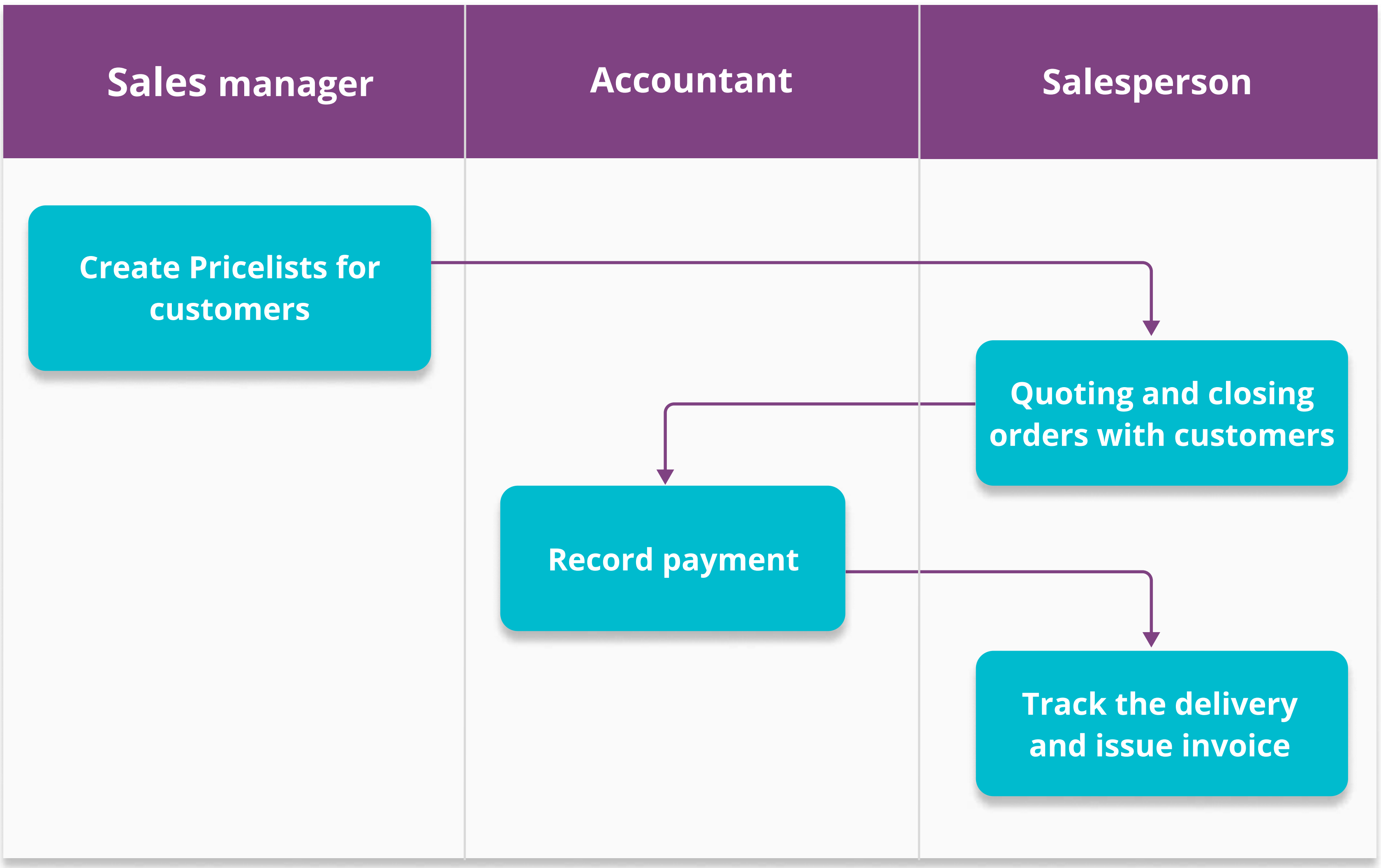
PROJECT MANAGEMENT



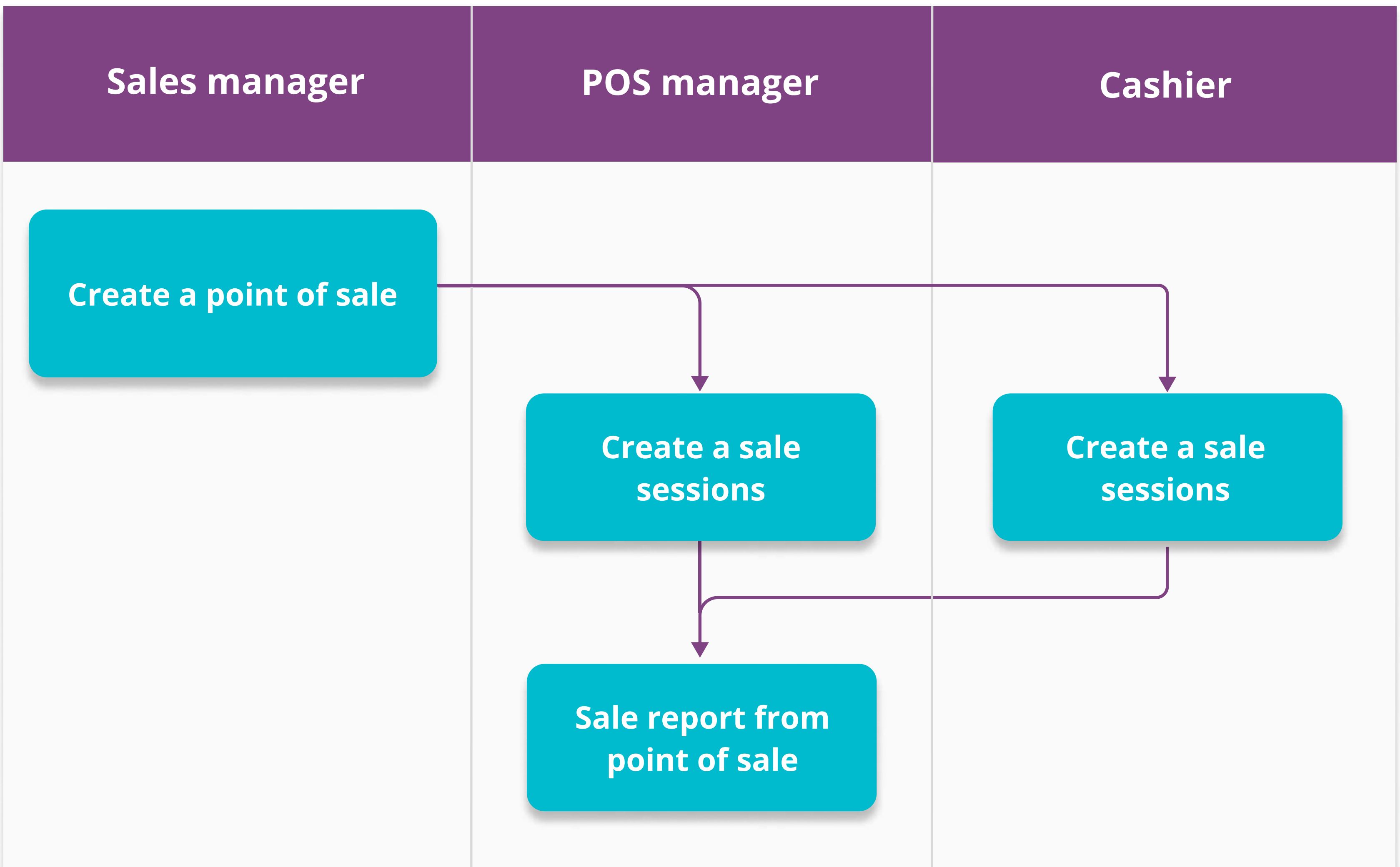
PURCHASE MANAGEMENT



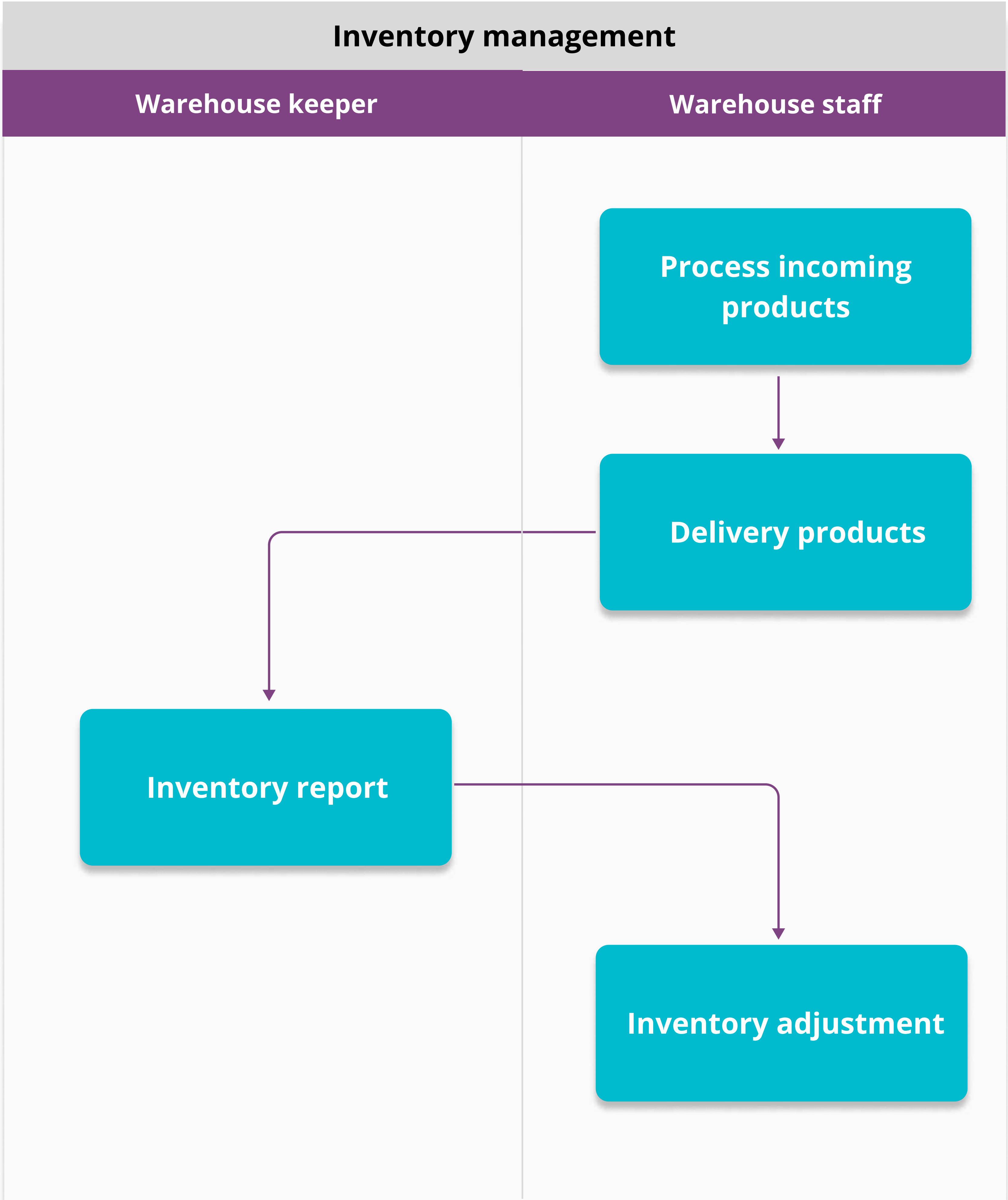
BASIC SALES OPERATIONS



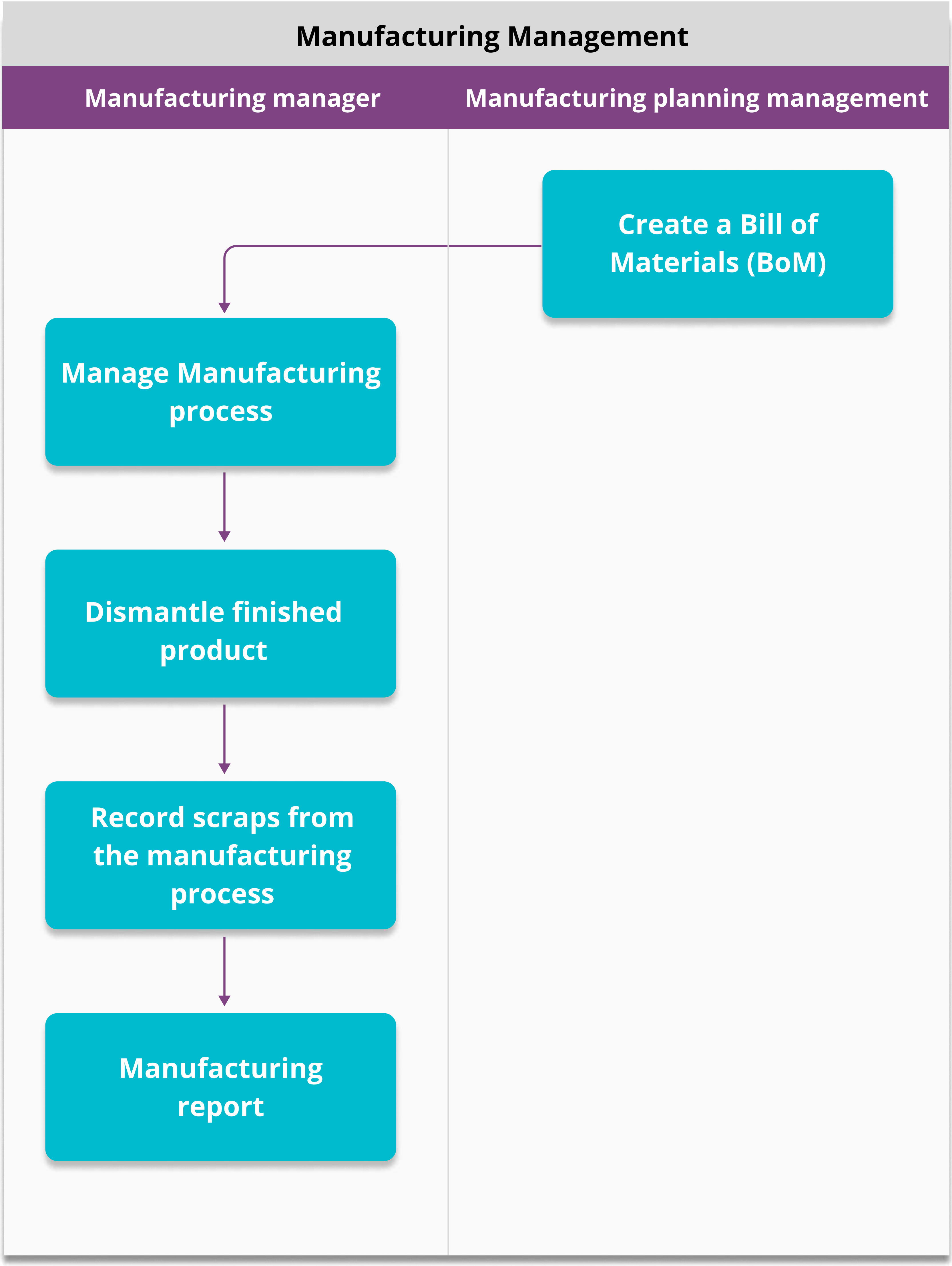
RETAIL OPERATIONS AT POINT OF SALE (POS)



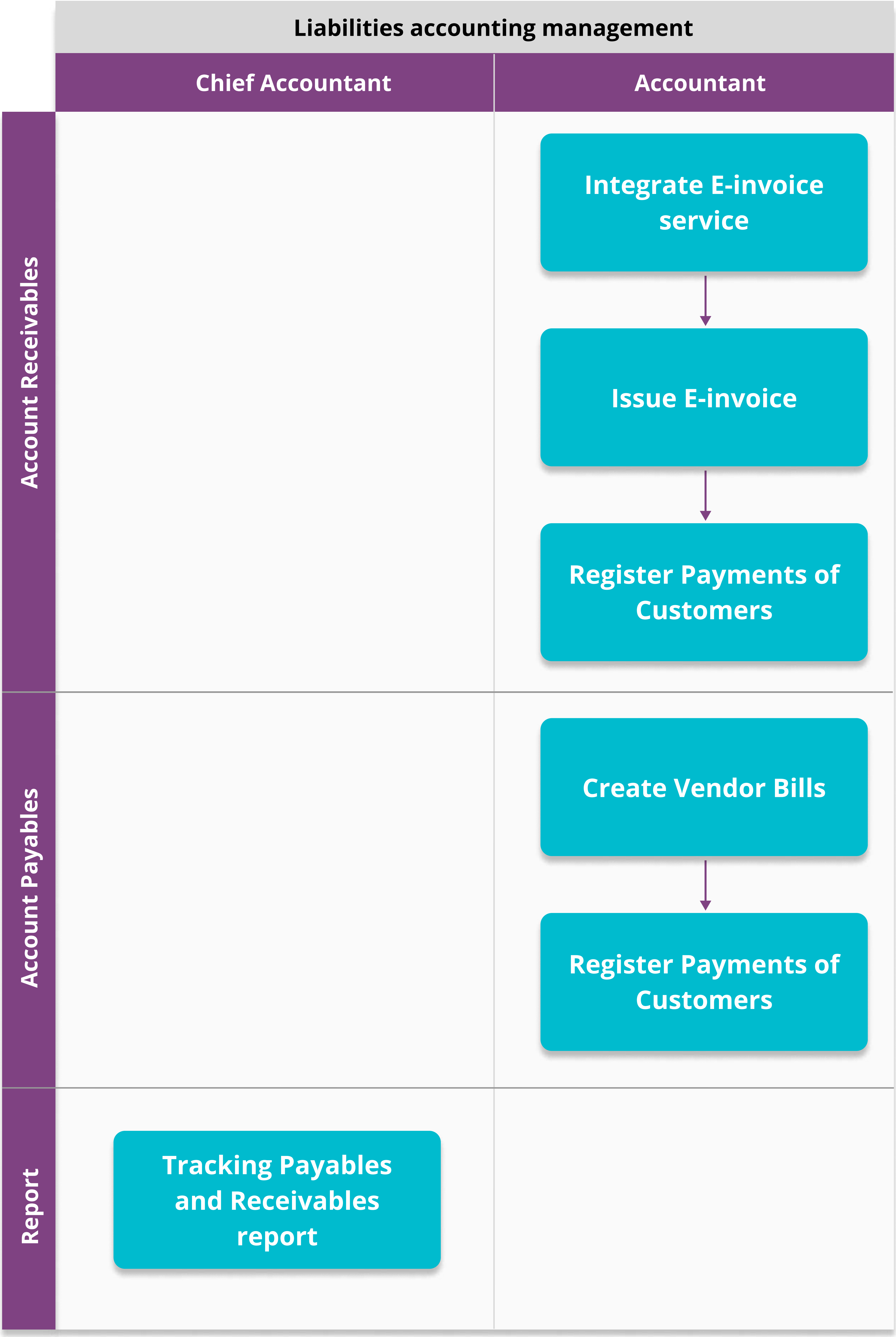
INVENTORY MANAGEMENT



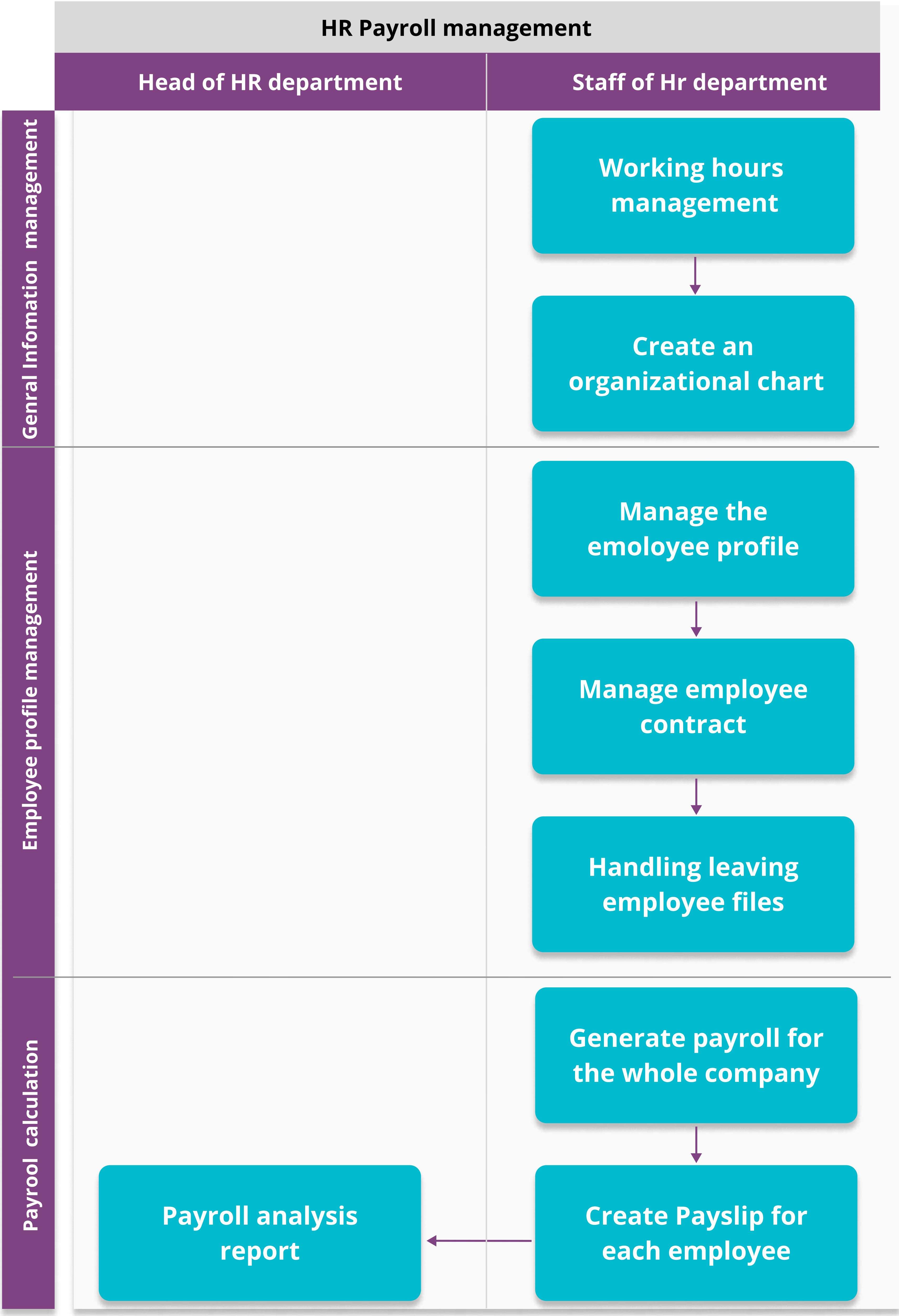
MANUFACTURING MANAGEMENTS



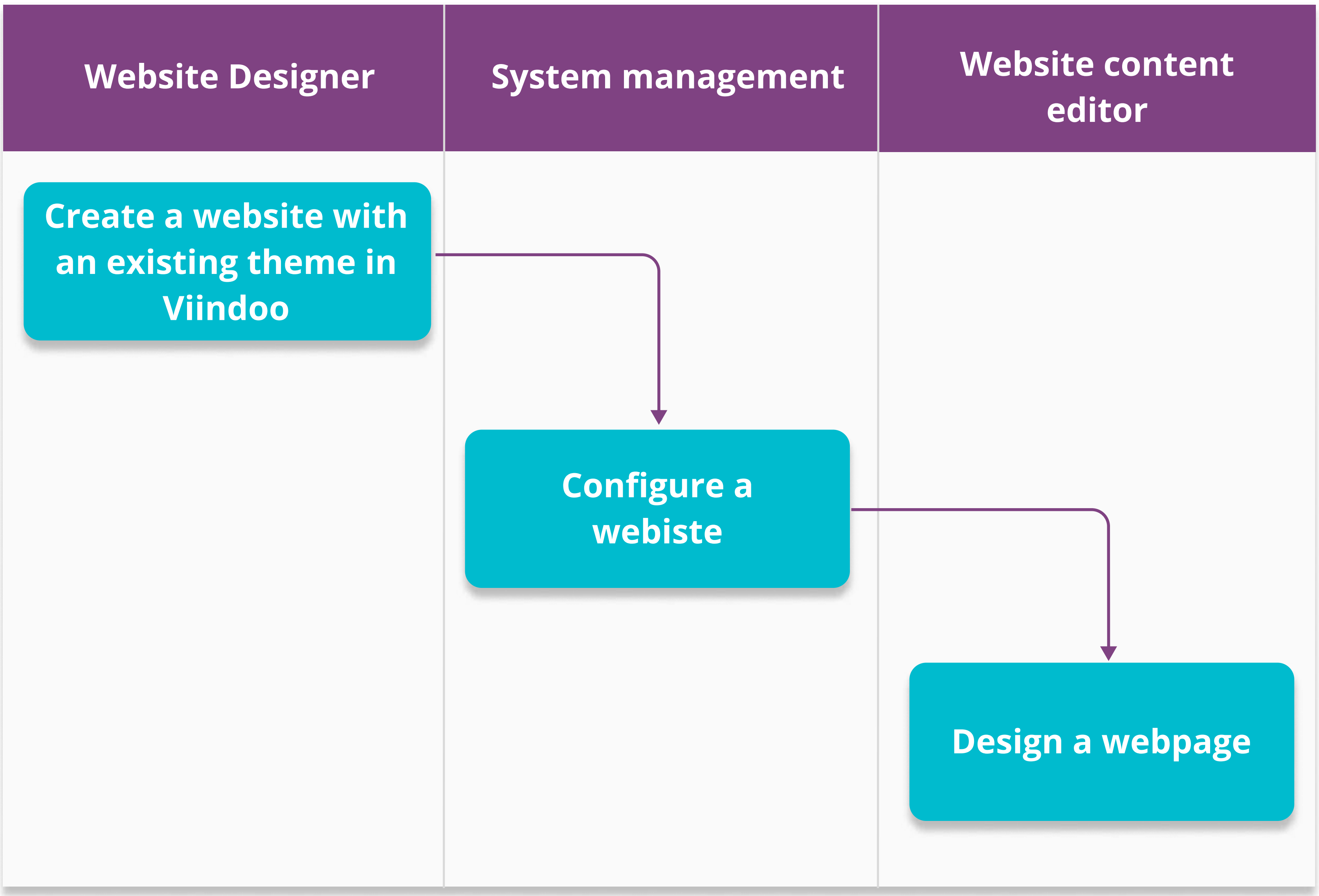
LIABILITIES ACCOUNTING MANAGEMENT



HR PAYROLL MANAGEMENT



WEBSITE MANAGEMENT



Implementing agency: Viindoo Technology Joint Stock Company
Viindoo version: [V15.0]

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