



EBOOK - QUICK START GUIDE



# QUICK START GUIDE WITH VIINDOO FOR **MICRO BUSINESS**

06 Steps to build an optimal business operations system

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# INTRODUCTION

Viindoo introduces the Quick Start Guide to help Micro Businesses (with less than 10 employees) define where to start, what to do, and how to implement the Viindoo Enterprise Management Software for their business.

Two factors that affect the success of a software implementation are human resources and time. As a business, you should assign some employees, in which one person will be the person in charge of implementing software for your business. The personnel in charge need to define roles, responsibilities, and orientations of the Board of Directors in order to coordinate time, design a roadmap for specific tasks, and commit to complete them.

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 micro 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.





# 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.

The screenshot shows the Viindoo pricing page. At the top, there's a navigation bar with links: Liên hệ, Đăng ký, Đăng nhập, and VIE. Below that, a header with the Viindoo logo and links: Phần mềm, Giải pháp, Biểu phí, Hỗ trợ, and a button: Dùng thử. The main heading is "The right plan for your needs" with a subtext: "Start-up or enterprise, pay for what you need with our plan. Get in touch, we'll provide the price that fits your budget, you can do it all with Viindoo Solution." There are two tabs: Monthly and Annually. Three plans are listed: One App (FREE), Standard (178,200 đ/user/month), and Luxury (226,800 đ/user/month). The Standard plan is marked as "Recommended". Each plan has a list of features and a "BUY NOW" button. The Standard and Luxury plans also have a "FREE TRIAL" button.

One App	Standard	Luxury
<b>FREE</b>	<b>178,200 đ</b> /user/month	<b>226,800 đ</b> /user/month
<ul style="list-style-type: none"><li>01 application only</li><li>Unlimited users</li></ul>	<ul style="list-style-type: none"><li>Unlimited applications</li><li>03 hours of free training</li></ul>	<ul style="list-style-type: none"><li>Unlimited applications</li><li>Flexible customization with Customizer</li><li>Multiple companies</li><li>Upload of Custom applications</li><li>05 hours of free training</li></ul>
START NOW	BUY NOW FREE TRIAL	BUY NOW FREE TRIAL

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.

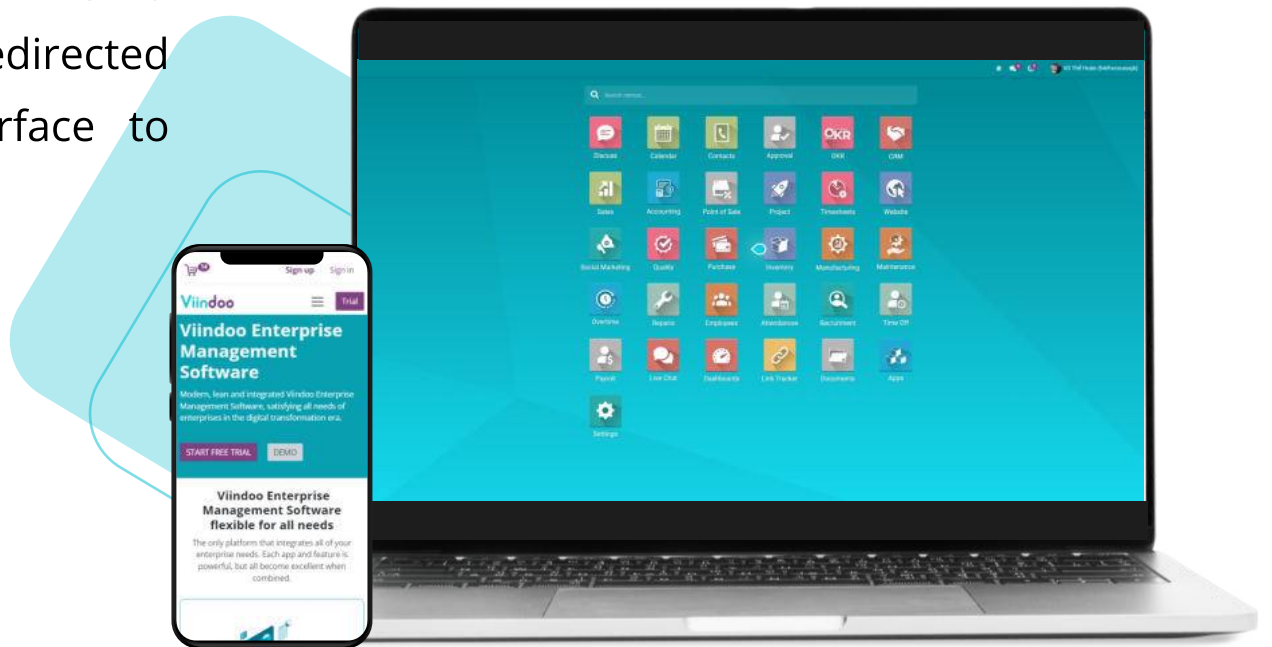
The screenshot shows the Viindoo sign-up page. On the left, a purple box says "Start a FREE 15 days trial of Viindoo now!" and lists four benefits: Fast & Easy (Instant access, No installation), Unlimited Functions (A solution for every need), Flexible Scalability (Expand easily as your business grow), and Wise investment (A reasonable cost for all type of budget). Below this is a "Need more help?" link and a contact number: +84 225 730 9838. On the right, a sign-up form titled "Sign up now to start the trial" has fields for: Your Name, Job Position, Business Types, Company Size, Phone Number, Email, Password (with a note: Password must be at least 8 characters in length), Confirm Password, Domain (with a dropdown for .viindoo.cloud), Language (with a dropdown for English (US)), and Country (with a dropdown for Vietnam). There are checkboxes for "Install demo data" and "I agree to the Privacy Statement". At the bottom, a note says: "By clicking on Submit, you are agreeing to authorize Viindoo to process personal data as described in the Privacy Statement." and a "Submit" button.

➡ 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

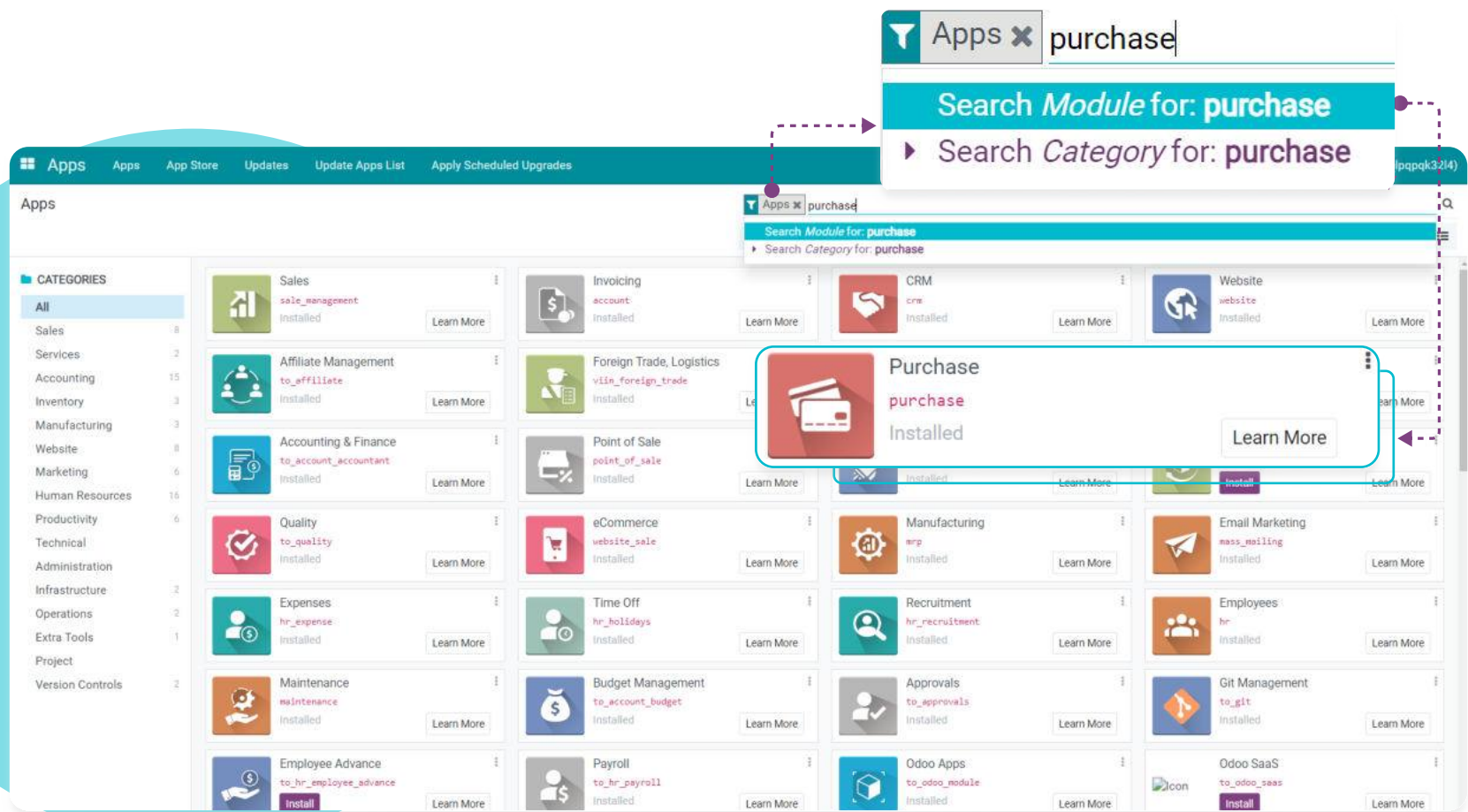
To ensure data security and avoid having to re-import data, don't forget to:

- 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.



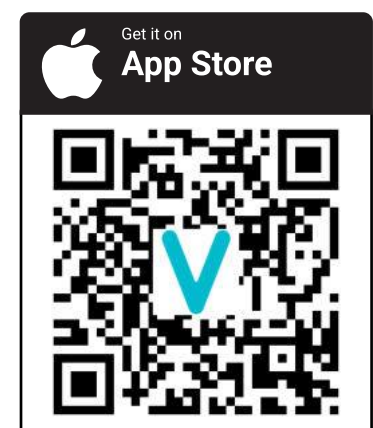
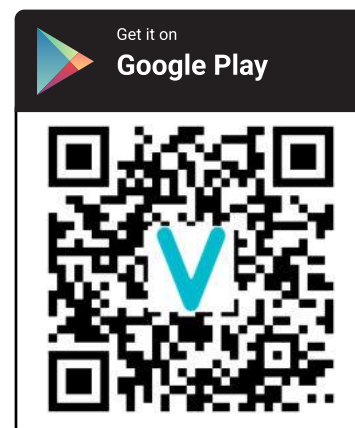


## USE VIINDOO ON MOBILES DEVICES

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.

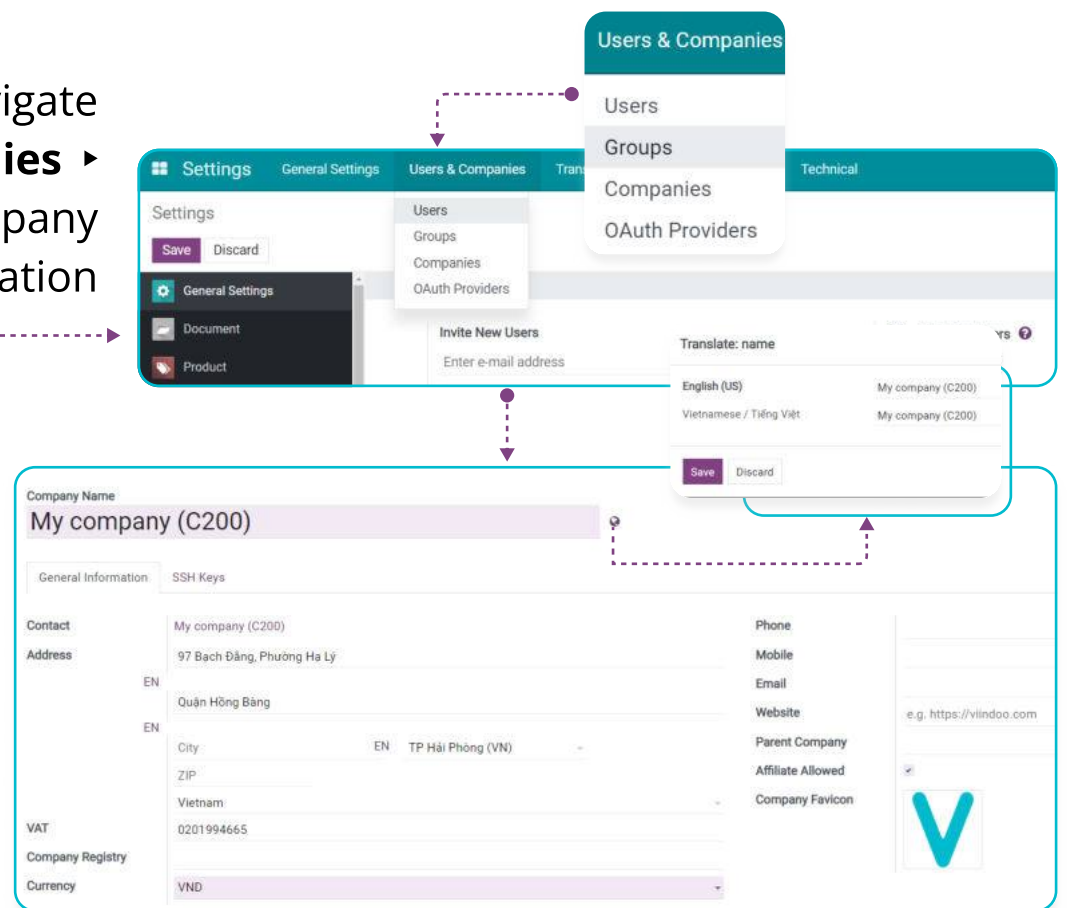



## SYSTEM MANAGEMENT

### 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:

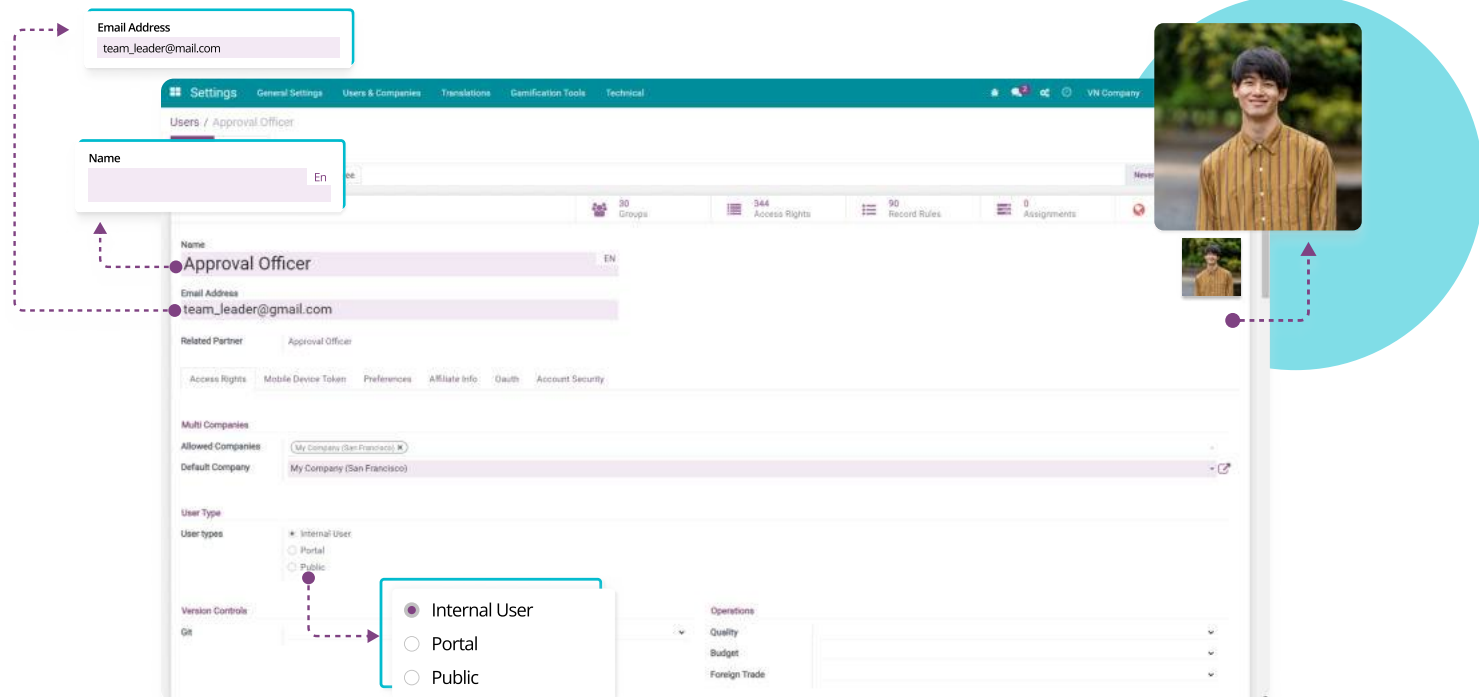


To display your company information in another language, you can click on the icon  or **EN** to enter the translated text for each information field.

### 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.

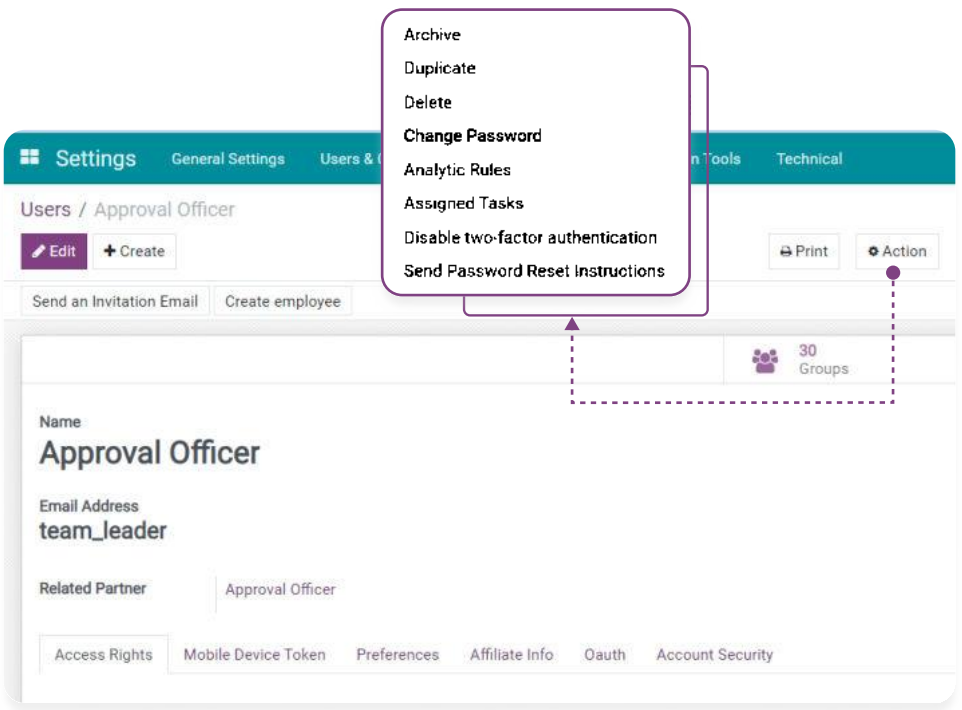
On the **Access Rights** tab, you should keep the default access right that the software suggested: Administrator in all apps. This will help all users to visualize the operation and data flow in the system, thereby smoothly and effectively coordinate with each other.

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	Documents Management		Purchase Management		Sales Management		Inventory Management		Accounting		Administration	
	Officer	Administrator	User	Administrator	User: Own Documents	Administrator	User	Administrator	Billing	Billing Administrator	Access Rights	Settings
Document Management Officer	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Purchasing Officer	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Salesperson	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Warehouse Staff	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Accounting Liabilities Officer	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Director	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

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](#) for security reasons.





## LOG IN AND CONFIGURE PERSONAL ACCOUNT

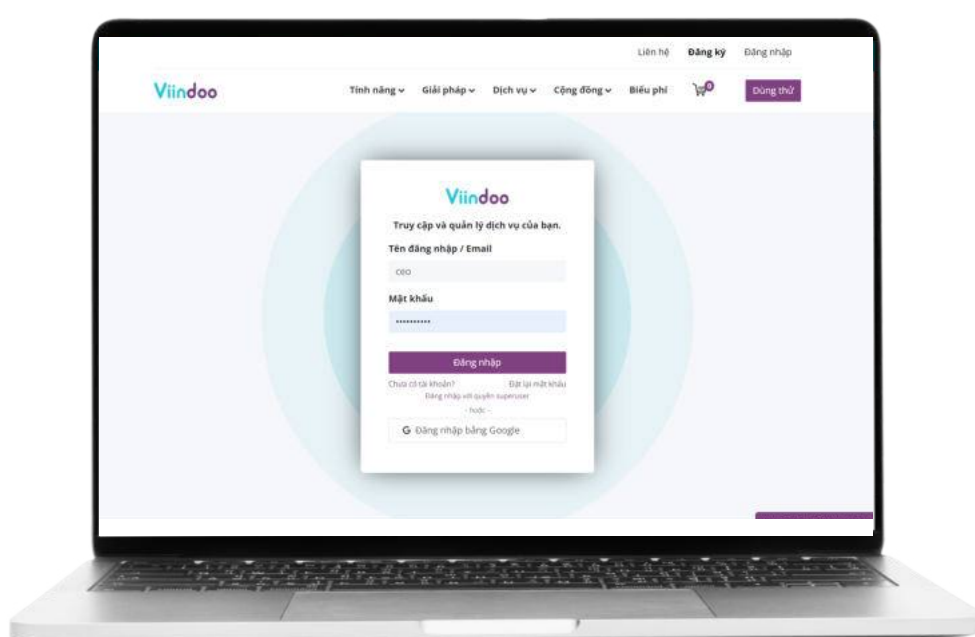
### LOG IN TO VIINDOO SOFTWARE

#### Log in on web browser

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

➡ e.g: your-company.viindoo.cloud

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



#### Log in on your phone

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

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



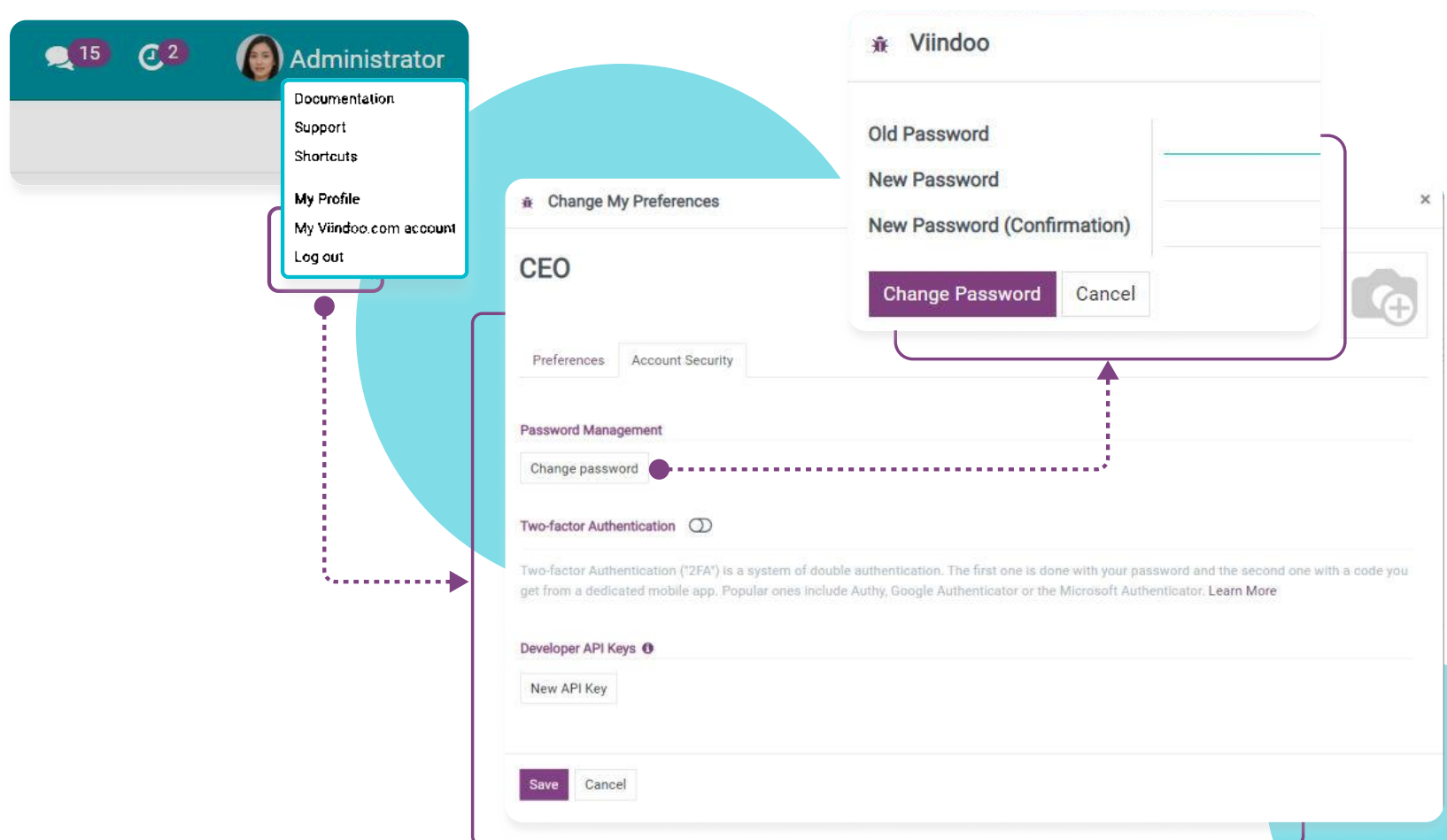
After successful login, you will be redirected to the Mobile view. Here, you can receive notifications, reply to emails, or do the same thing as in a web browser.



## CHANGE PASSWORD

### Change new password

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

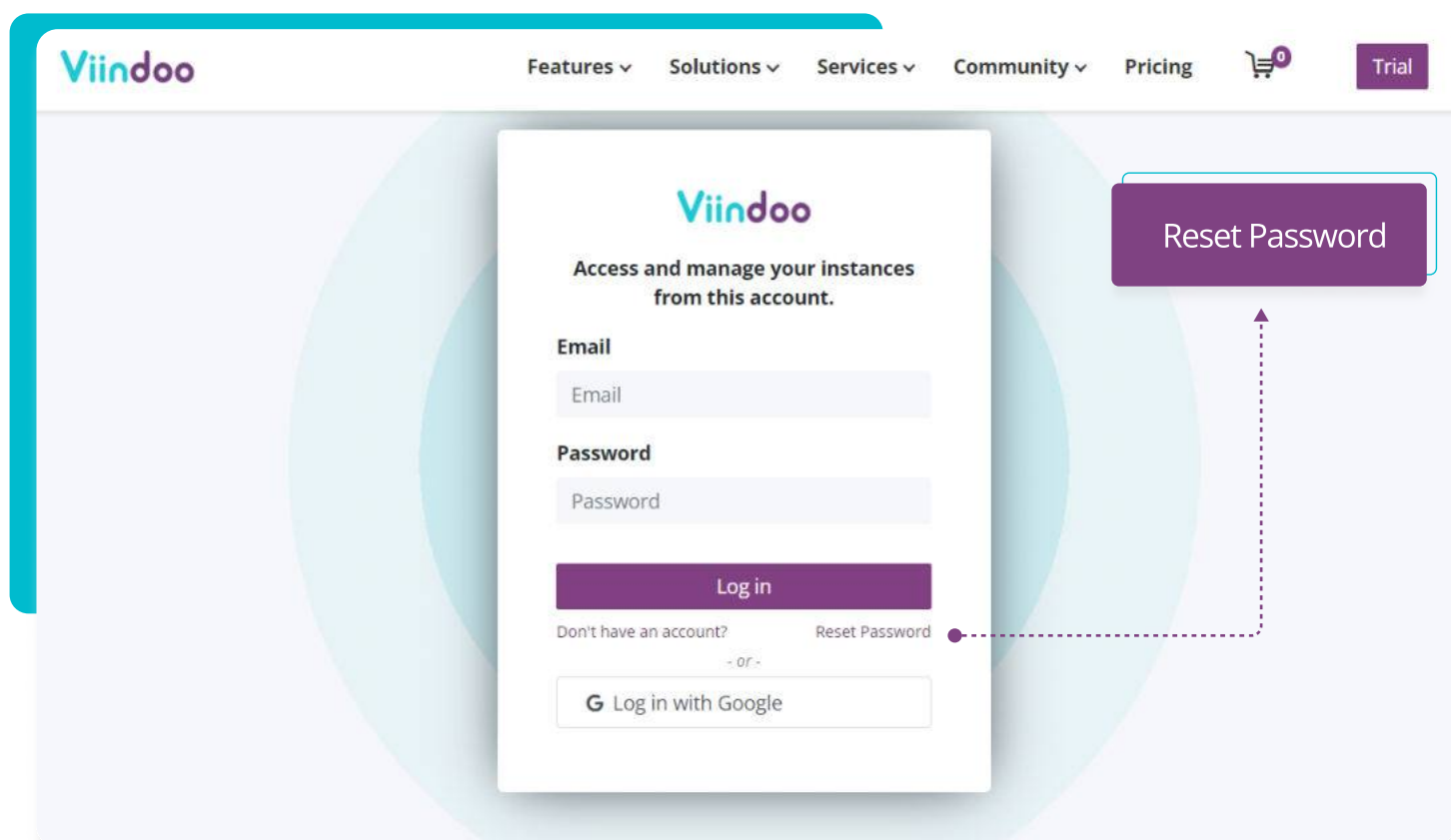


Enter the new password and press **Change Password** to complete.

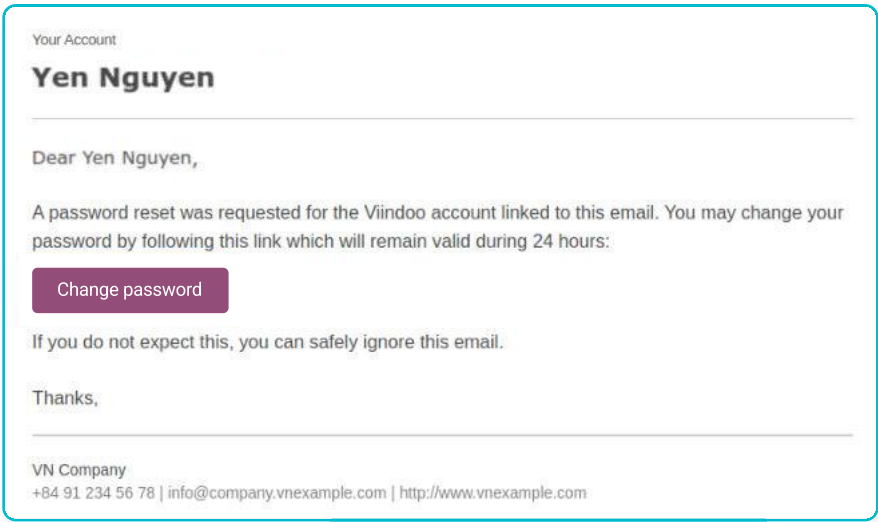
### Reset password

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

Click **Reset Password** to follow the instructions:



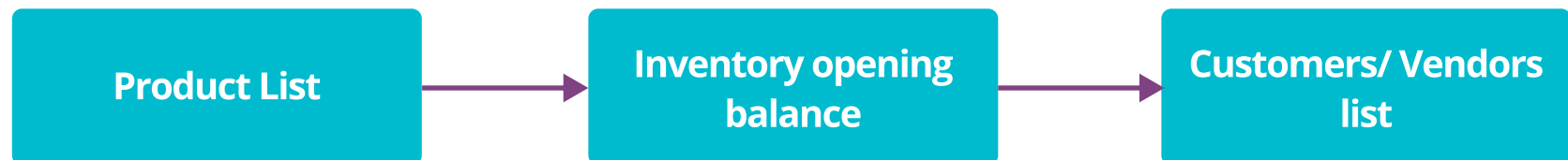
The system will send you an email with instructions to reset your password. Access your email account, press **Change password**, select a new one and **Confirm**.

A screenshot of the Viindoo website's password reset form. The website header includes the Viindoo logo, navigation links (Home, Shop, Events, Courses, Services, Pricing, Company, Docs), a shopping cart icon with a "0" badge, and links for "Sign in", "English (US)", and "Contact Us". The form itself has four input fields: "Your Email" (with a blurred email address), "Your Name" (with "Yen Nguyen"), "Password", and "Confirm Password". A purple "Confirm" button is at the bottom of the form. A dashed line connects the "Change password" button in the email above to the "Confirm" button in the form.

## PREPARE INITIAL DATA

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

Initial data to be prepared including:



## PRODUCTS LIST

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



### Create a product category

Product categories are used to categorize products of your business into different groups. The product categories feature in Viindoo software is built 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.

The screenshot shows the 'Product Categories' configuration form in the Viindoo software. The form is titled 'Product Categories / All / Saleable' and has a 'Save' button and a 'Discard' button. The form is divided into several sections: 'Category' with the value 'Physics books', 'Parent Category' with the value 'All / Saleable', 'Logistics' with the value 'Force Removal Strategy', and 'Inventory Valuation' with the values 'Costing Method: Specific Identification' and 'Inventory Valuation: Automated'. The form is displayed in a light blue theme with a white background.

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

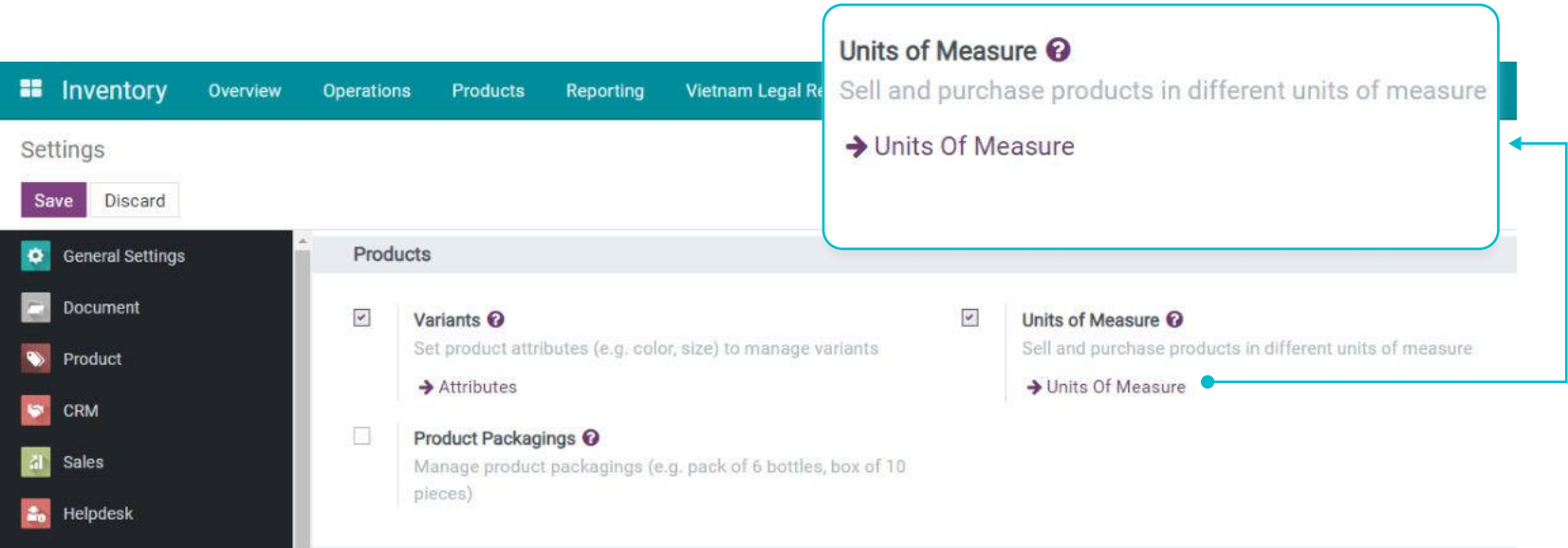
**Note**

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

Create a Unit of Measure (UoM)

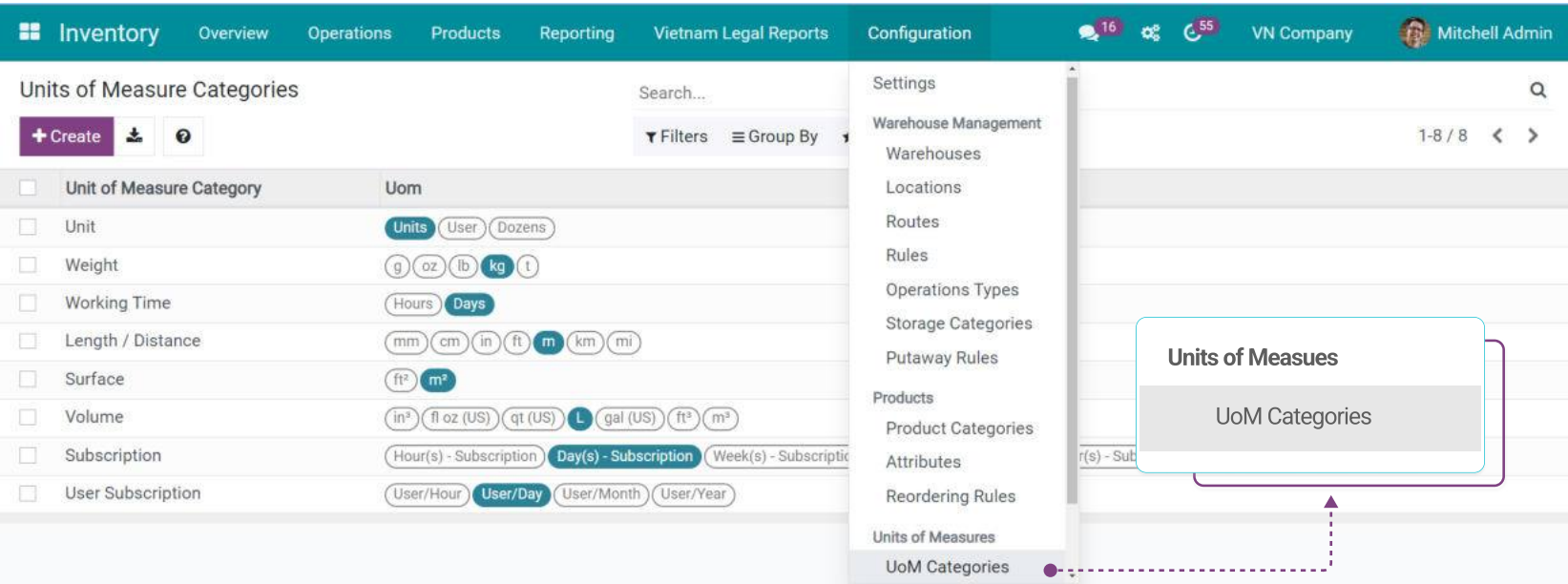
Enable Units of Measure feature

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



Create new Units of Measure (UoM)

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





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

sure

1.00000

0.01000

Unit of Measure Category

Unit

EN

Name Concatenation

Units of Measure

Unit of Measure	Type	Ratio	Active	Rounding Precision
Units	Reference Unit of Measure for this category	1.00000		0.01000
User	Bigger than the reference Unit of Measure	1.00000		1.00000
Dozens	Bigger than the reference Unit of Measure	12.00000		0.01000
	Smaller than the reference Unit of Measure	1.00000		0.01000

Add a line

- ➔ See details at:
- Activate different units of measure

Create a new product

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

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

Inventory

Overview

Operations

Products

Create

Acoustic Bloc Screens

[FURN\_6666]

Price: 295.00 ₺

On hand: 0.00 Units

Cable Management Box

[FURN\_5555]

Price: 100.00 ₺

On hand: 0.00 Units

Corner Desk Left Sit

[FURN\_1118]

Price: 85.00 ₺

On hand: 0.00 Units

Desk Combination

[FURN\_7800]

Price: 450.00 ₺

On hand: 0.00 Units

Car

[RENT003]

Price: 1.00 ₺

On hand: 0.00 Units

Corner Desk Right Sit

[E-COM06]

Price: 147.00 ₺

On hand: 0.00 Units

Desk Organizer

[FURN\_0001]

Price: 5.10 ₺

On hand: 0.00 Units

Conference Chair

2 Variants

Price: 33.00 ₺

On hand: 0.00 Units

Customizable Desk

5 Variants

Price: 750.00 ₺

On hand: 0.00 Units

Desk Pad

[FURN\_0002]

Price: 1.98 ₺

On hand: 0.00 Units

Products / [FURN\_0269] Office chair

Edit

Create

Action

Print Labels

Update Quantity

Replenish

Product Name

Office chair

Can be Sold

Can be Purchased

General Information

Purchase

Inventory

Accounting

Product Type

Storable Product

Sales Price

1,250,000.00 ₺ (+ 1,375,000 ₺ Incl. Taxes)

Customer Taxes

Value Added Tax (VAT) 10%

Cost

800,000.00 ₺

Product Category

All / Saleable

Internal Reference

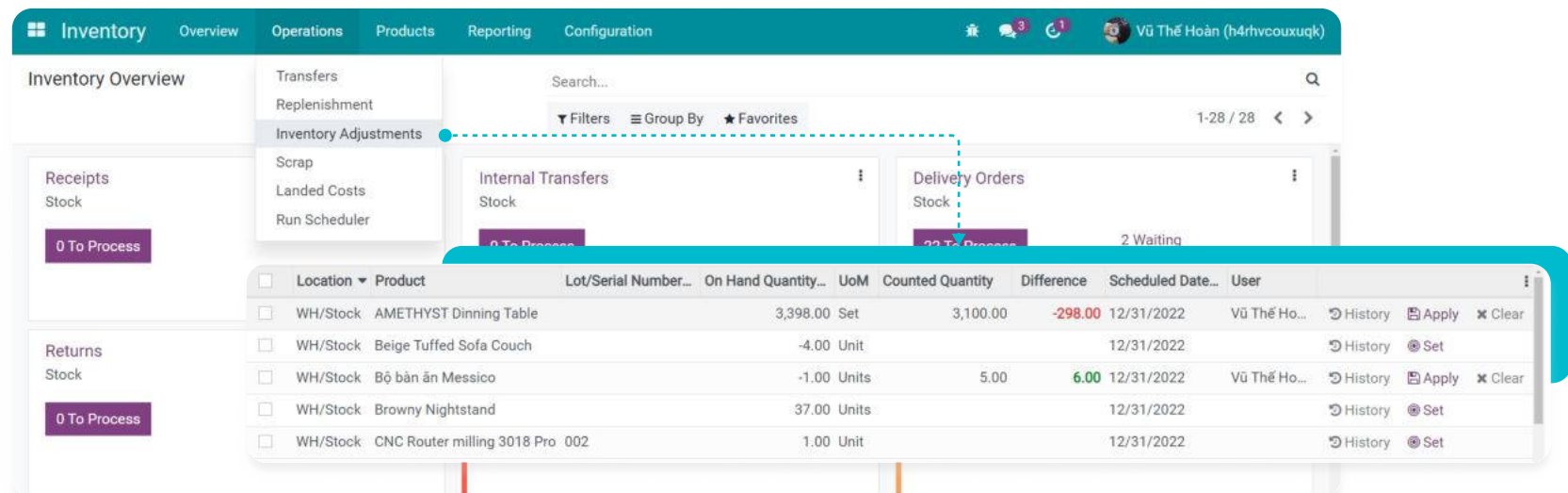
FURN\_0269

Barcode

## 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**.



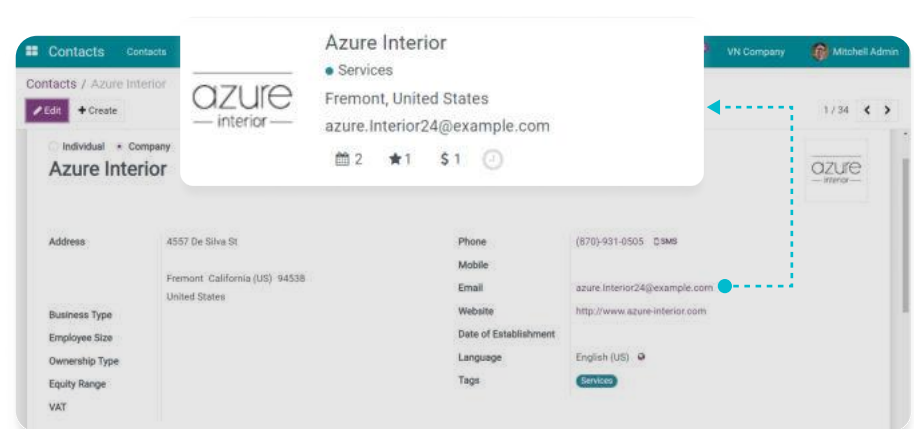
Add the following information:

- *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**

## PERFORMING DAILY OPERATIONS IN VIINDOO

Organize document workspace

E-documents storage

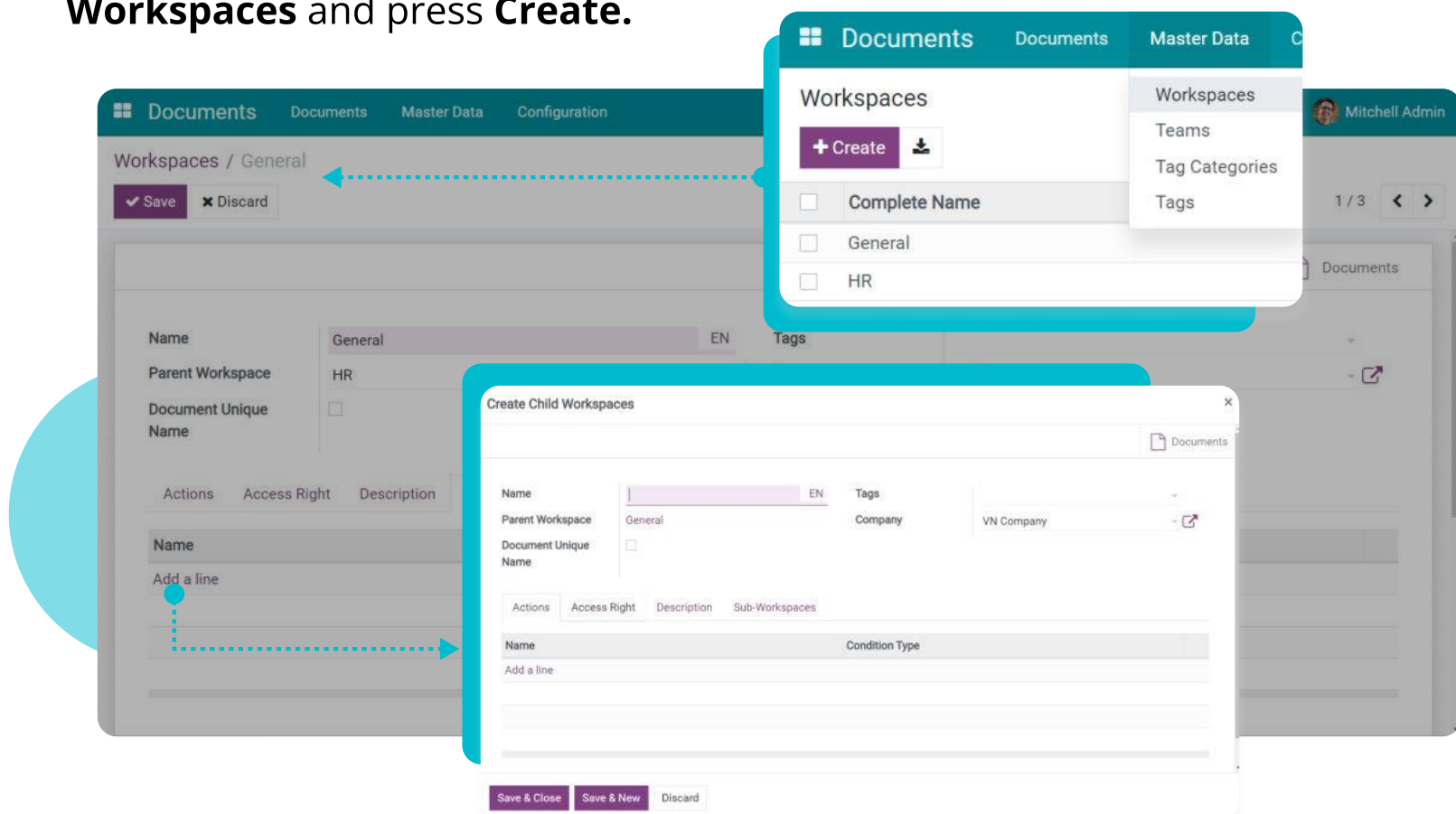
Share documents

Search documents

Delete Documents

### ORGANIZE DOCUMENTS WORKSPACE

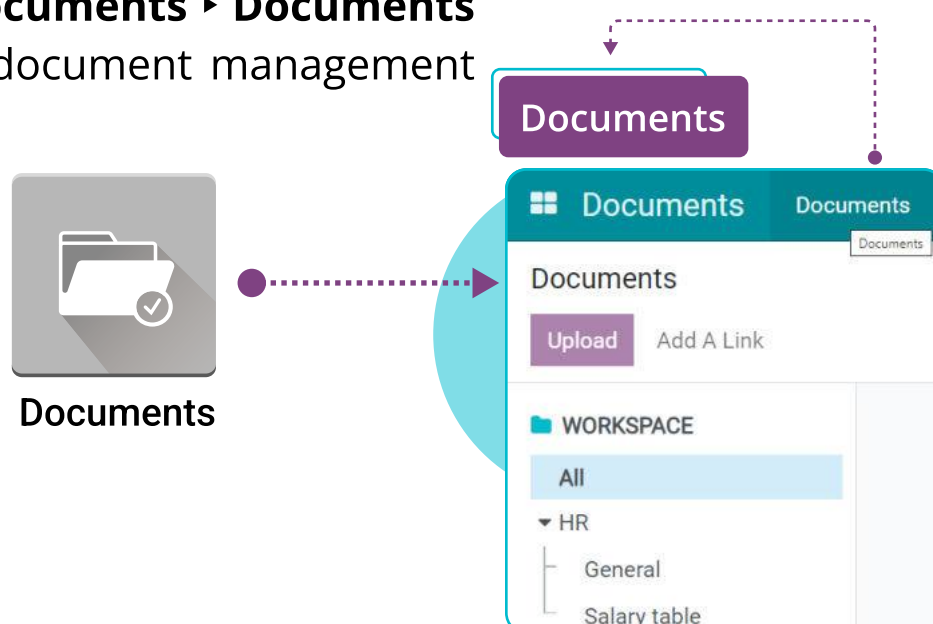
Documents in the Viindoo system are organized and stored into different workspaces. To create a workspace, go to **Documents** ▶ **Master Data** ▶ **Workspaces** and press **Create**.



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

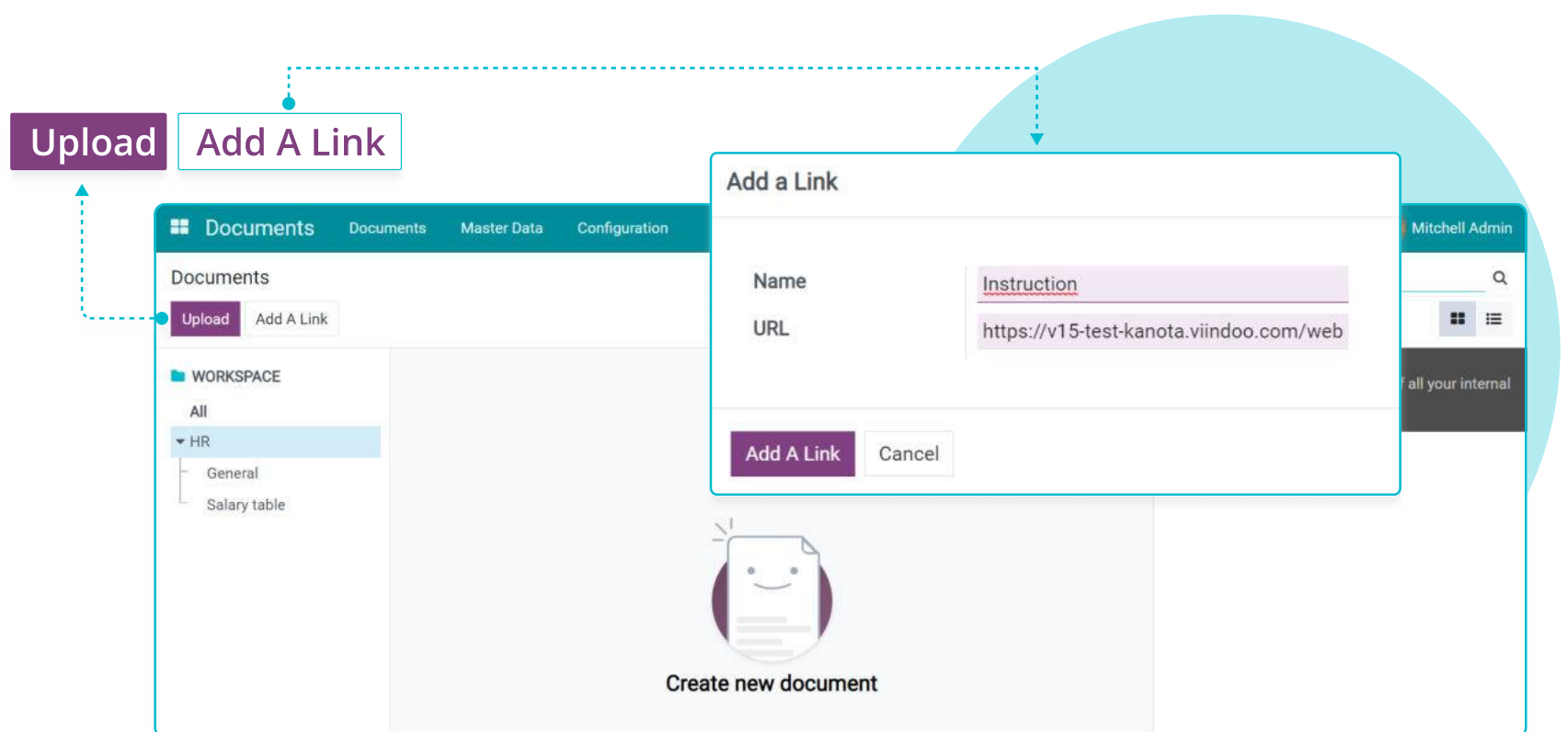
### E - DOCUMENTS STORAGE

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





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

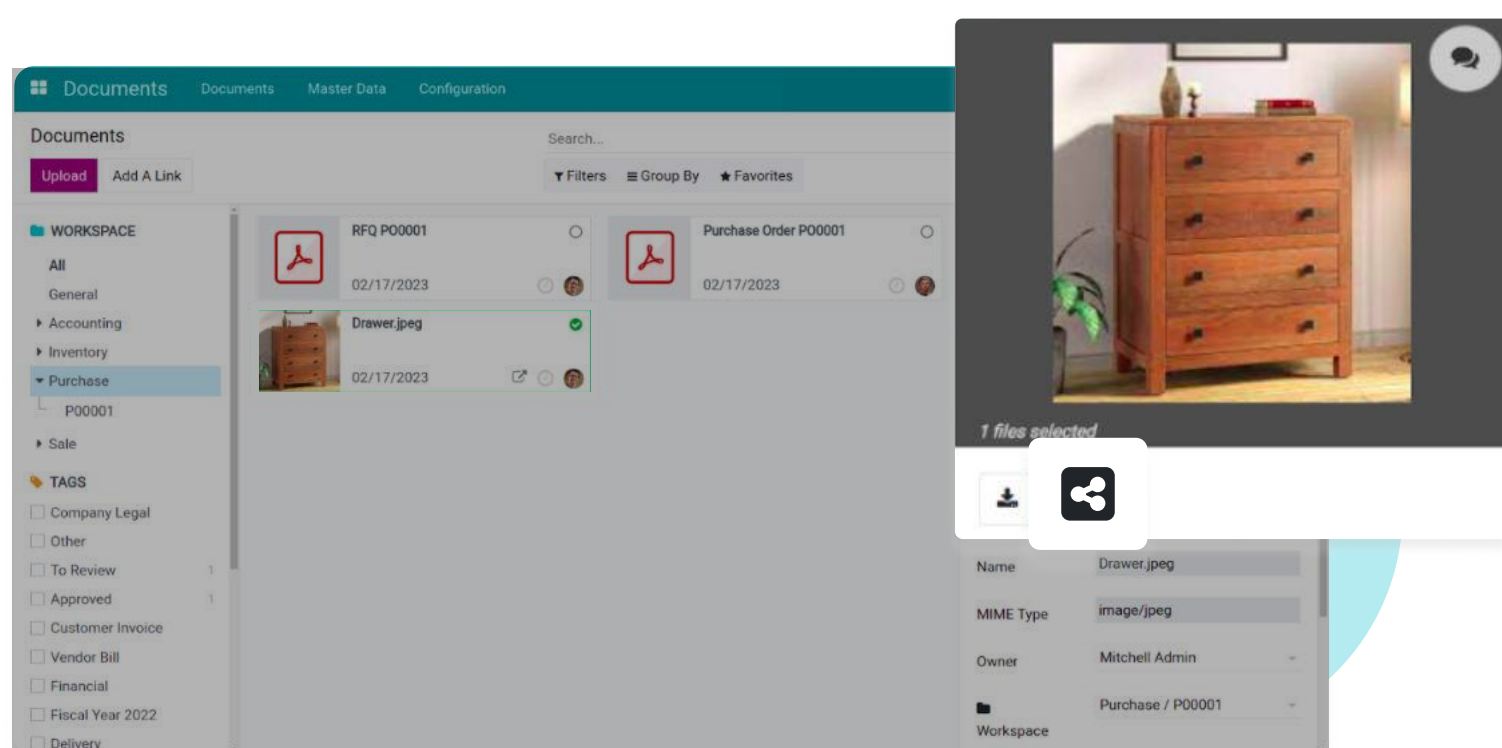


Press **Upload** to upload files (PDF, Excel, Word) from your computer to the Viindoo system.

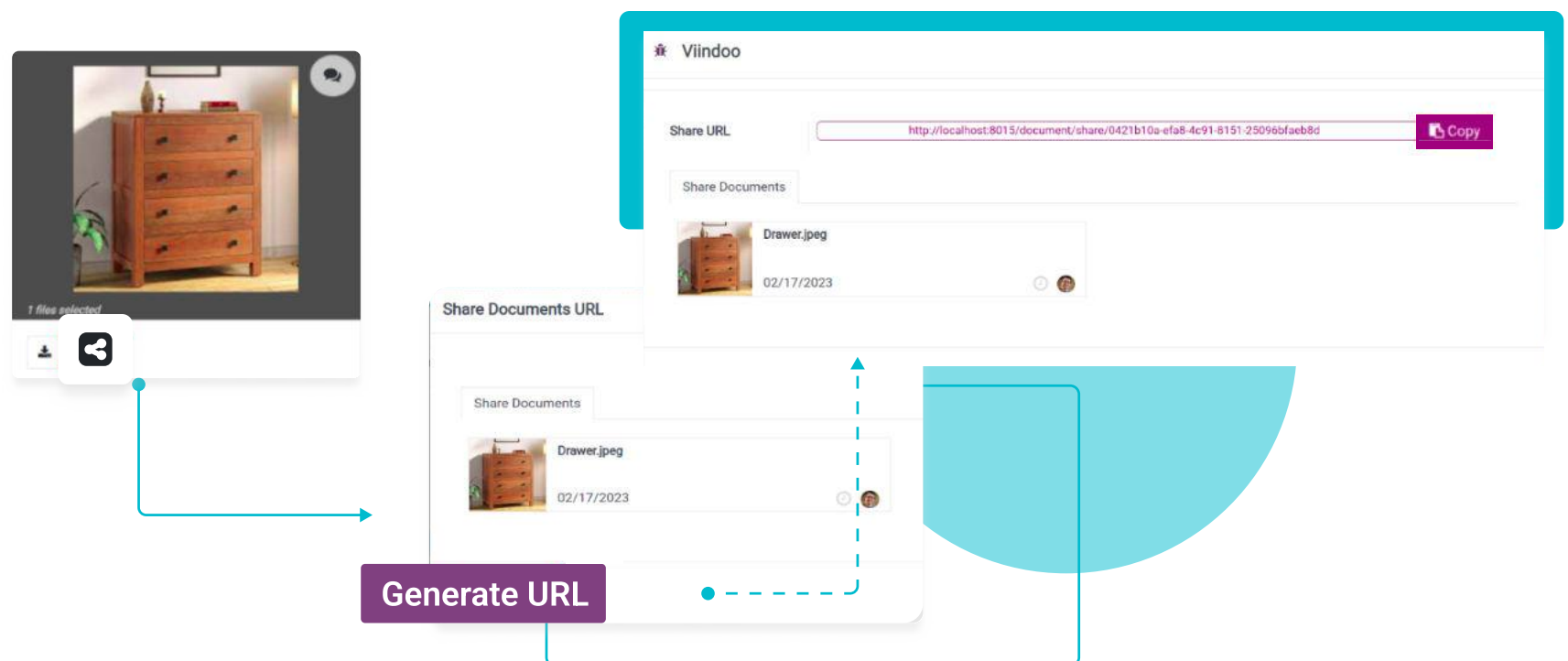
Press **Add A Link** to attach documents as links. You will be redirected to the interface to enter the name and URL for the link. Then press **Add A Link** to complete the operation.

## SHARE DOCUMENTS

To share a document within the 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 select **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.

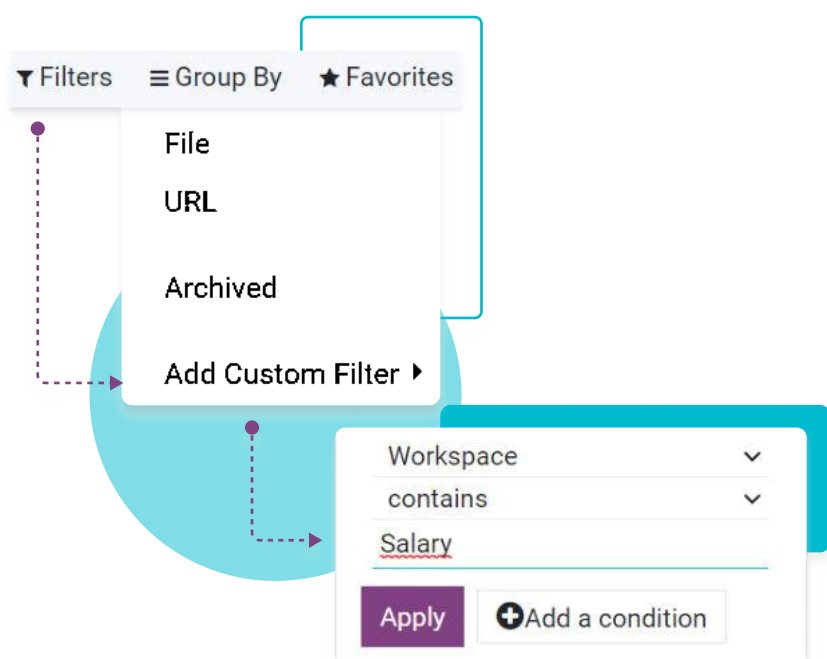


## SEARCH FOR DOCUMENTS

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 documents by each 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.

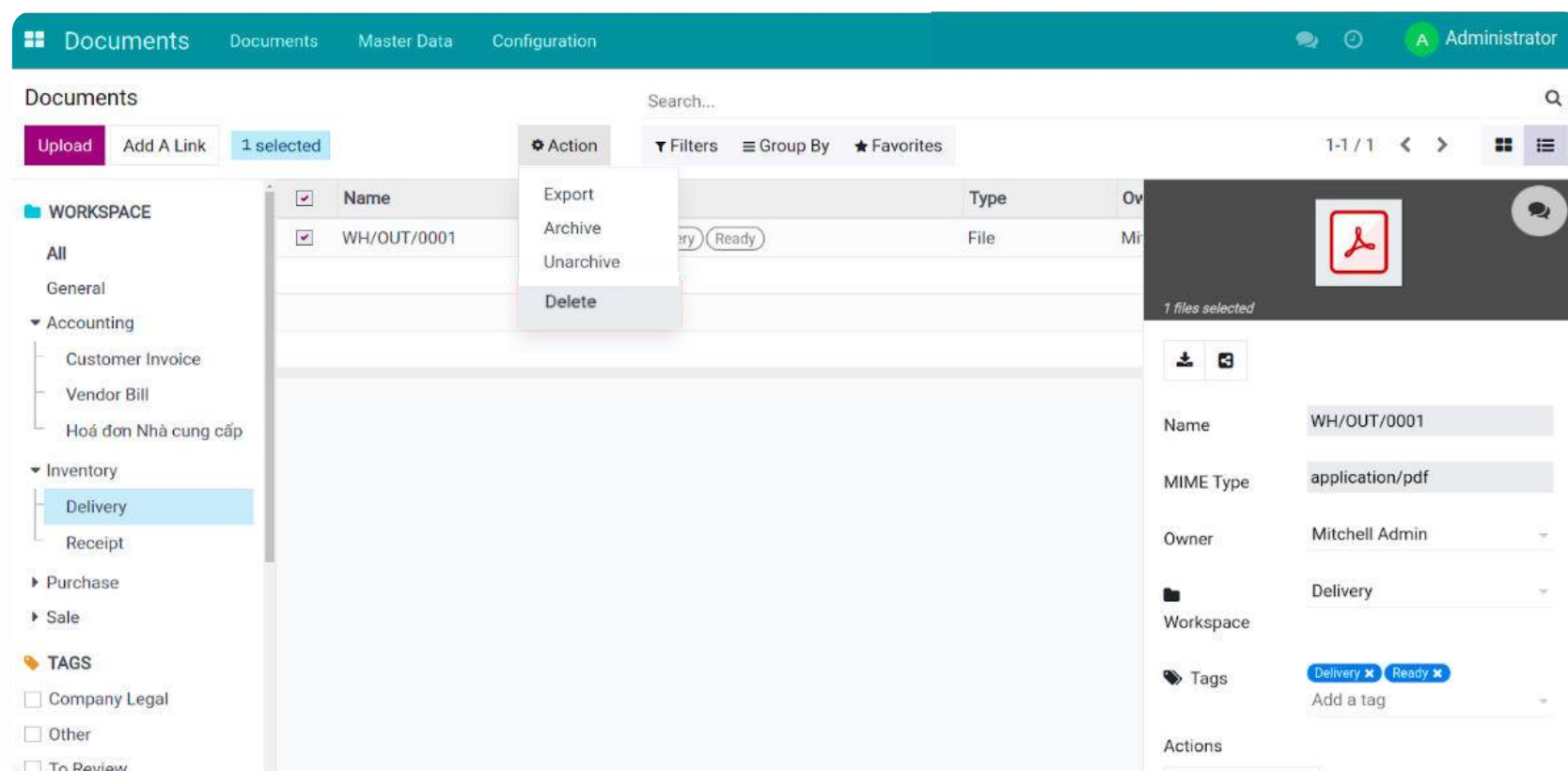
## DELETE DOCUMENTS

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

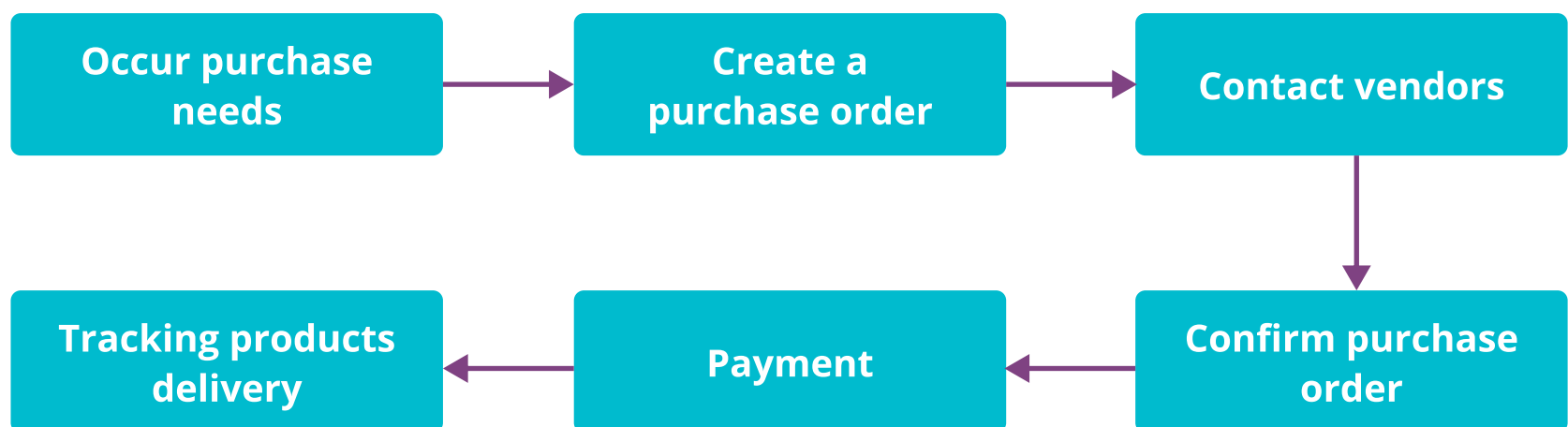
**Step 1:** Navigate to **Documents**, select the workspace containing the documents that need to be deleted, and switch to the list view.

**Step 2:** Select the document you want to delete.

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



## PURCHASE MANAGEMENT

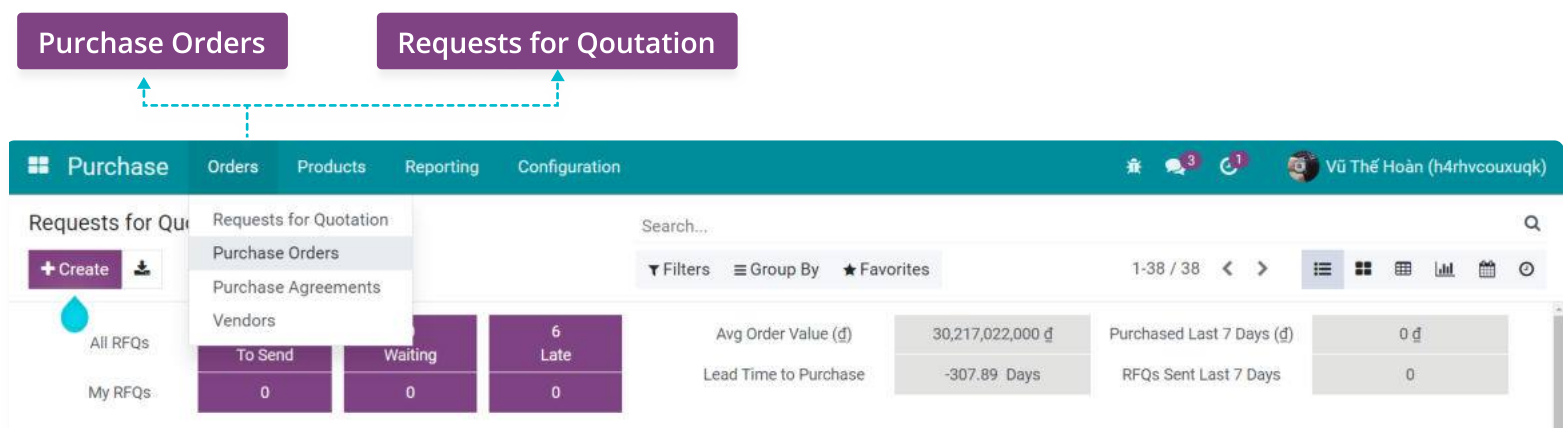


The above diagram describes the general procurement process of a business. However, this process might vary depending on each business structure and actual operations. In this eBook, Viindoo will show you how to perform the main steps of this procurement process, starting from *Create a purchase order*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

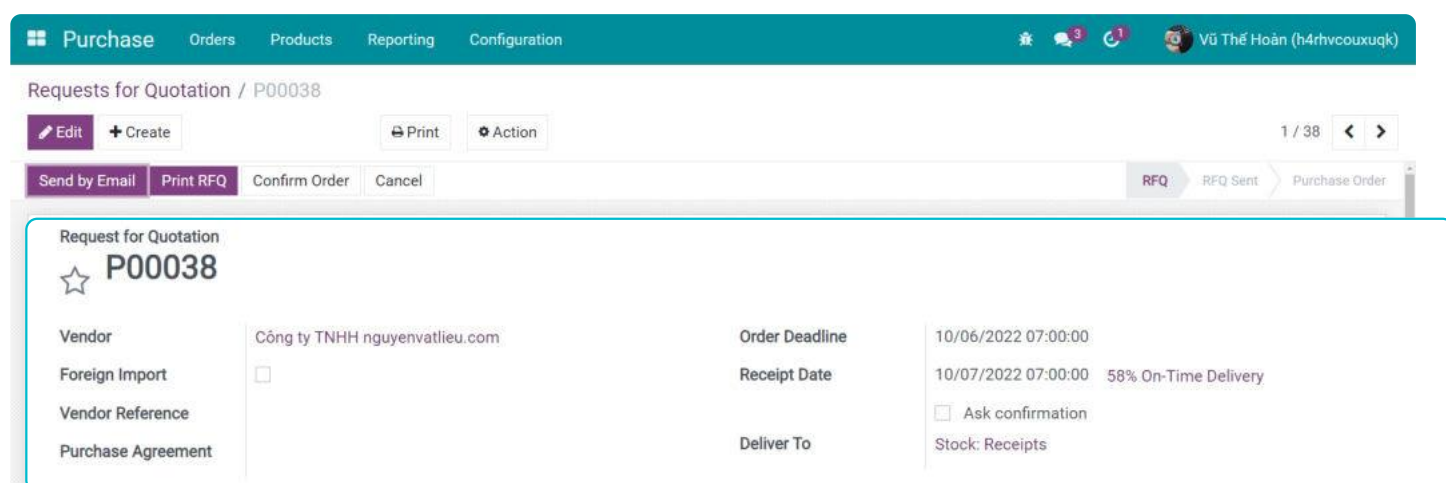
### CREATE A PURCHASE ORDER

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

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



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





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

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

Product	Description	Delivery Date	Quantity	Unit Price	Taxes	Subtotal
<b>Beverages</b>						
Coca Cola	Coca Cola	01/27/2022 12:00:00	20.00	5,000.00	Deductible VAT 10%	100,000 ₡
Fanta	Fanta	01/27/2022 12:00:00	30.00	4,000.00	Deductible VAT 10%	120,000 ₡
<i>Be careful by transportation</i>						
<b>Beer</b>						
Heiniken	Heiniken	01/27/2022 12:00:00	10.00	20,000.00	Deductible VAT 10%	200,000 ₡

Define your terms and conditions ...

Untaxed Amount: 420,000 ₡  
Taxes: 42,000 ₡  
**Total: 462,000 ₡**

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

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

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

Purchase Representative: Administrator

Payment Terms: Immediate Payment

Fiscal Position:

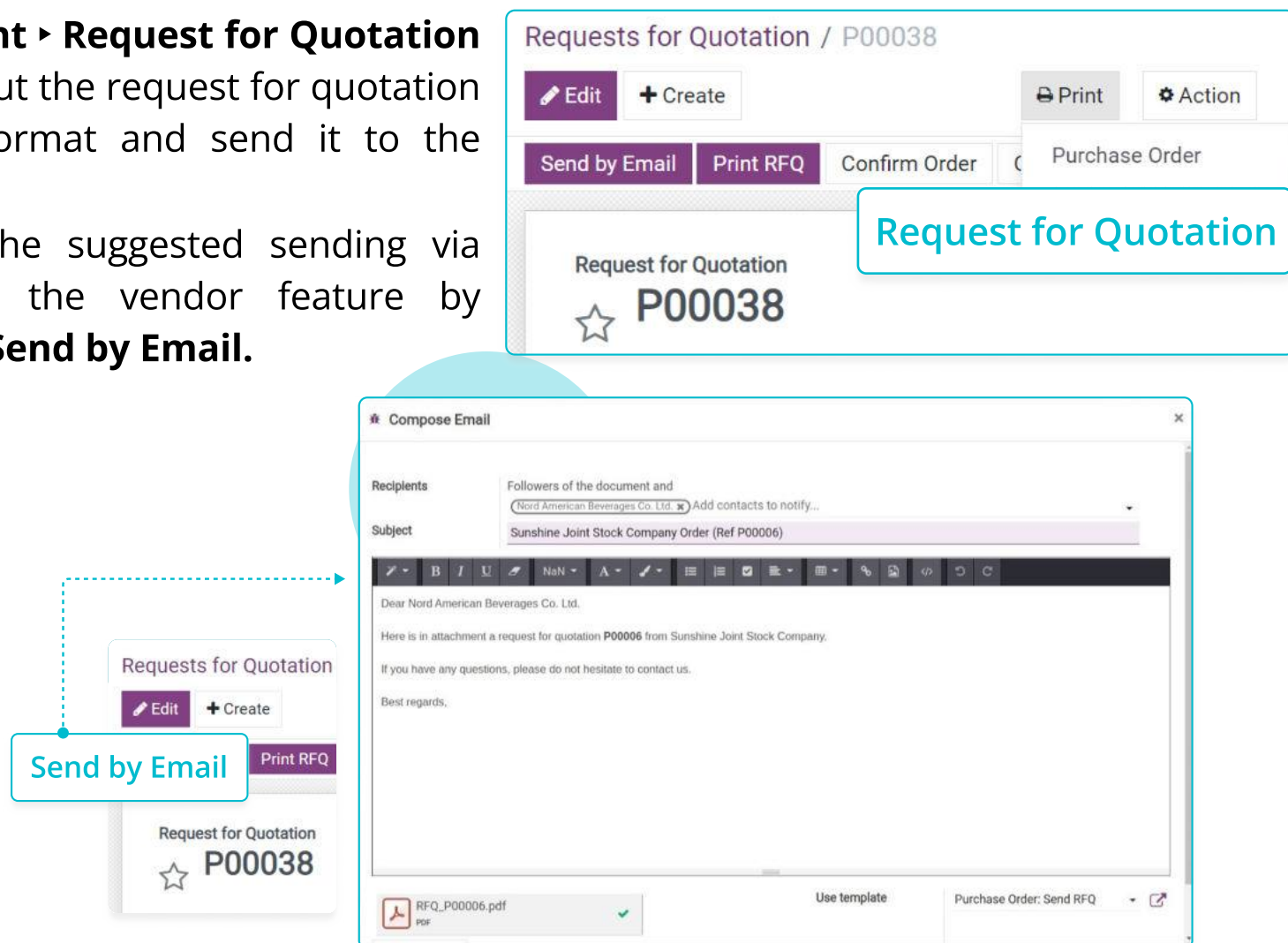
- *Purchase Representative*: The user who created this request for quotation will be displayed by default but you can select another person in charge.
- *Payment Terms*: Select the payment term that applies to the purchase order. Press Save to save the information.

Press **Save** to save the information.

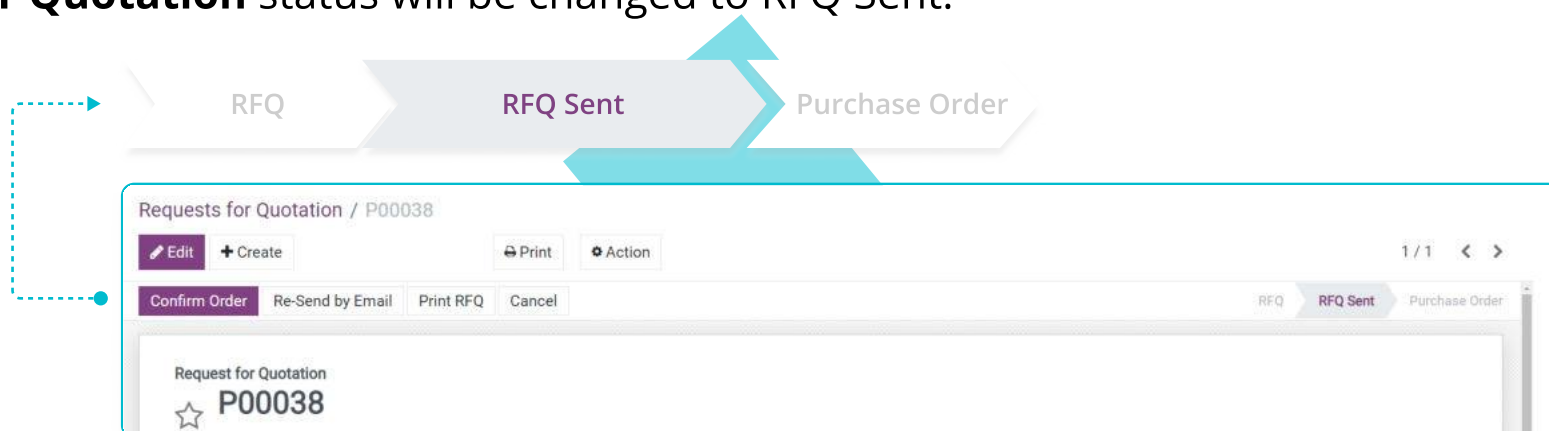
## CONTACT VENDOR

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

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

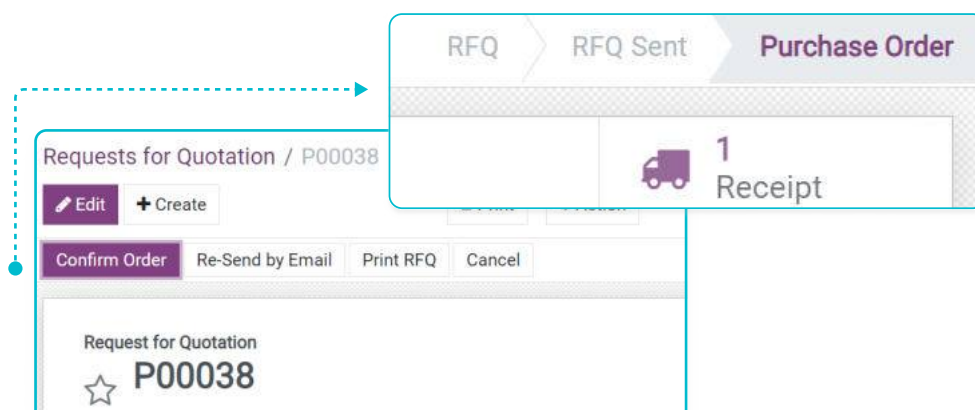


The Request for Quotation in PDF format will be automatically attached to the email, edit the email content if necessary and press **Send**. Once done, **the Request for Quotation** status will be changed to RFQ Sent.



## CONFIRM A PURCHASE ORDER

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



## PAYMENT

- ➡ See details in:
- Account Payable

# 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:

Purchase

Orders

Products

Reporting

Configuration

1

A Administrator

Requests for Quotation / P00006

Edit

Create

Print

Action

1 / 1

<

>

Receive Products

Send PO by Email

Create Bill

Cancel

Lock

RFQ

RFQ Sent

Purchase Order

Purchase Order

☆ P00006

Vendor

Nord American Beverages Co. Ltd.

Vendor Reference

Confirmation Date

02/17/2023 10:36:32

Receipt Date

01/27/2022 16:24:17

Ask confirmation 1 day(s) before

Products

Other Information

Product	Description	Quantity	Received	Billed	Unit Price	Taxes	Subtotal	
Beverages								
Coca Cola	Coca Cola	20.00	0.00	0.00	5,000.00	Deductible VAT 10%	100,000 đ	
Fanta	Fanta	30.00	0.00	0.00	4,000.00	Deductible VAT 10%	120,000 đ	
Be careful by transportation								
Beer								
Heiniken	Heiniken	10.00	0.00	0.00	20,000.00	Deductible VAT 10%	200,000 đ	
Add a product Add a section Add a note								

Untaxed Amount:

420,000 đ

VAT 10%:

42,000 đ

Total:

462,000 đ





## SALES MANAGEMENT

Create Pricelist

Quoting and  
closing orders

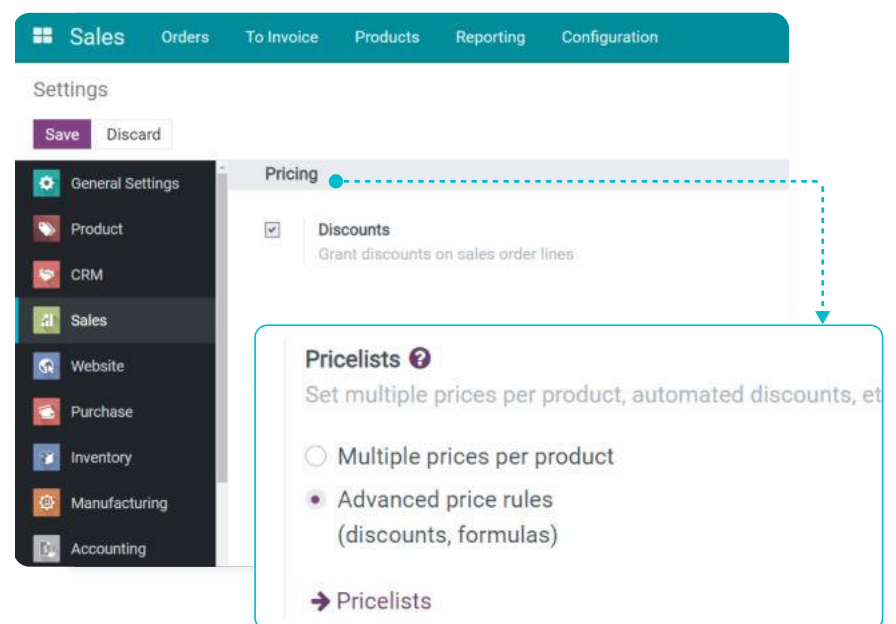
Record payment

Track the delivery  
and issue invoice

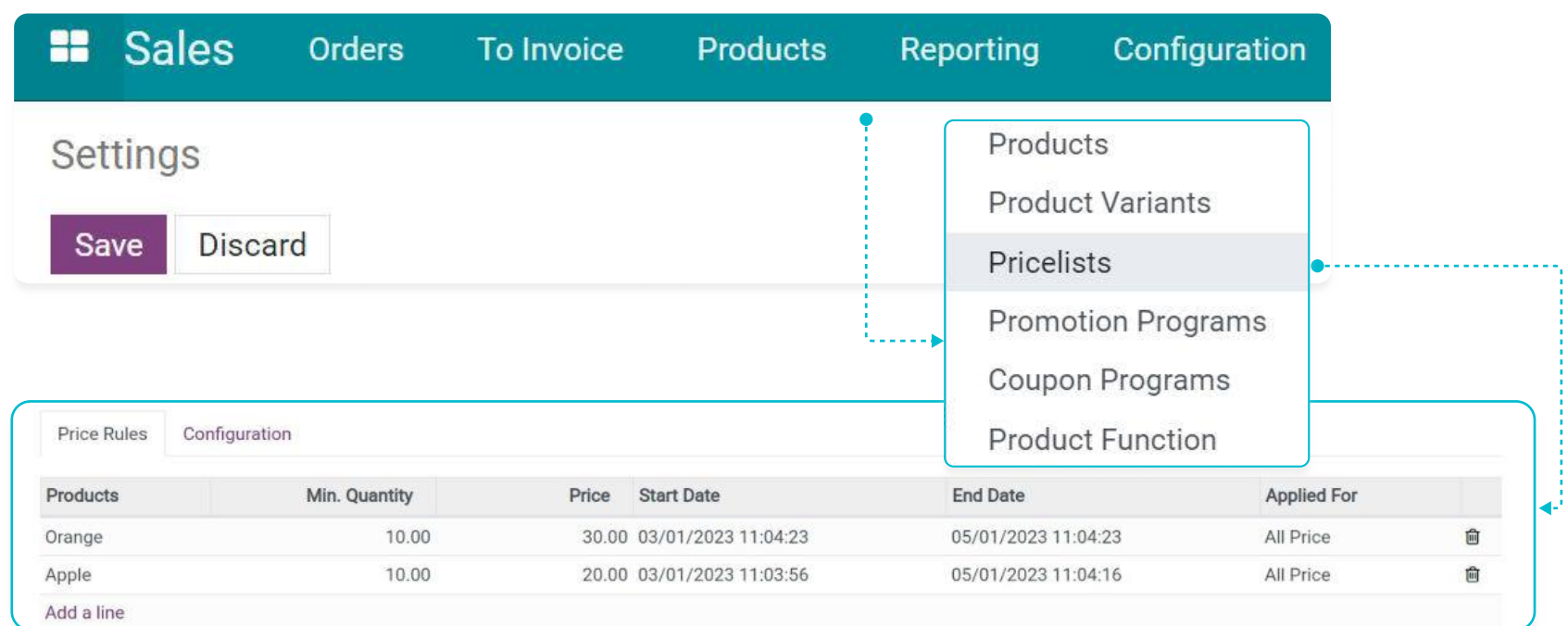
### CREATE PRICELISTS FOR CUSTOMERS

#### 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

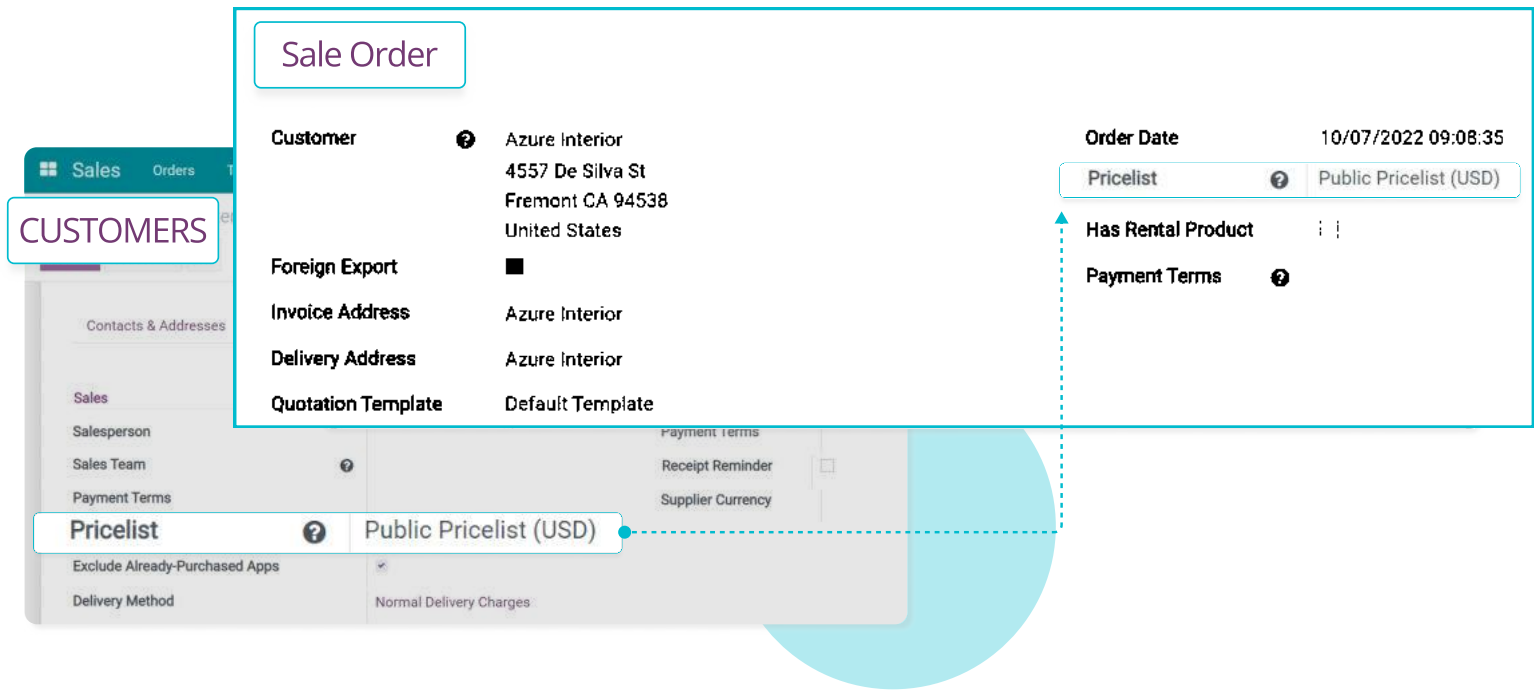


- *Products*: Select the products that this pricelist will be applied to.
- *Min. Quantity*: The minimum sales quantity that needs to be reached in order to apply the price configured in the **Price** column.
- *Price*: Set up the sales price for the product.
- *Start Date/End Date*: The applicable period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

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

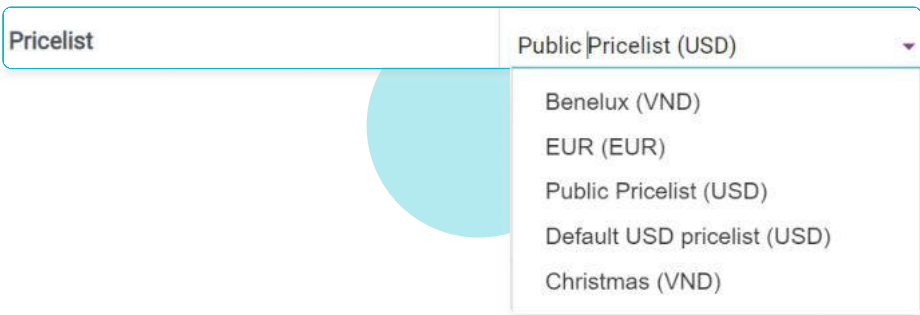


To apply a pricelist to a specific customer or a group of customers, navigate to **Sales ▶ Orders ▶ Customers**, and select the partner you want to apply this pricelist to. On the **Sales & Purchase** tab, select the pricelist you've just created.



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

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



Besides, Viindoo provides tools to set up Pricelists with more complicated rules and formulas.

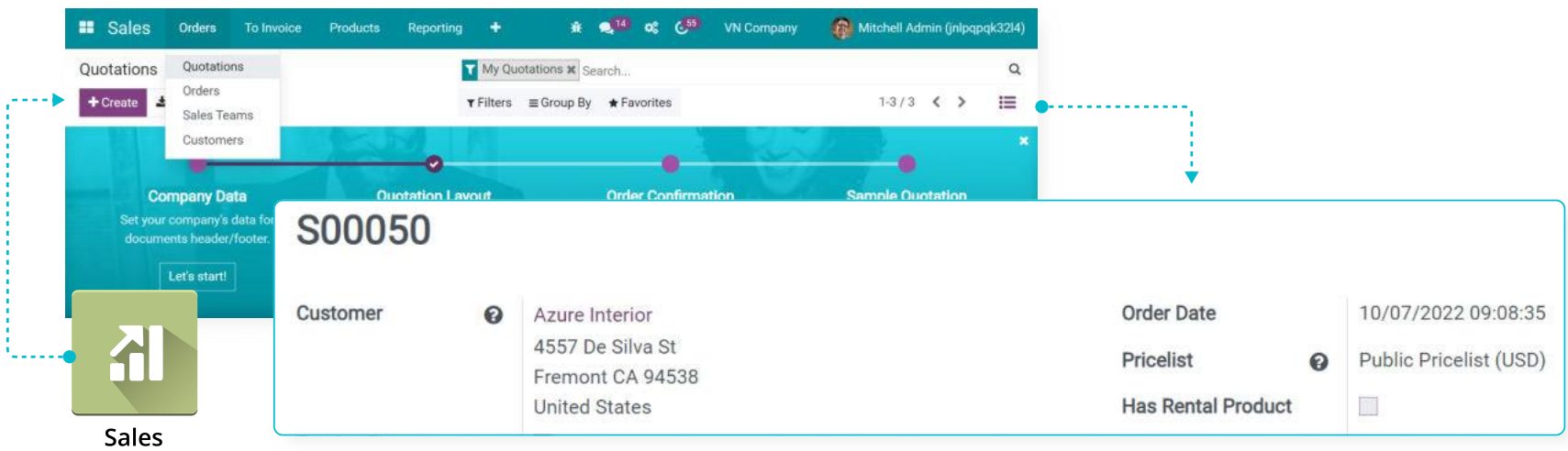
➡ See details at:

- [Guide to set up pricelists with advanced price rules](#)

## QUOTING AND CLOSING ORDERS WITH CUSTOMERS

### Create a new quotation

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



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

- *Customer*: Select an existing customer or create a new one.
- *Expiration*: The day this quotation expires
- *Pricelist*: The pricelist applied to this customer.

*Payment Terms*: Select the payment term for this quotation/sales order to track this customer's payments.

➔ See details at:

- [How to create a new contact in Viindoo](#)
- [Activate Terms and Conditions in Sales](#)

- *Order Lines tab*:

Product	Description	Quantity	Unit Price	Taxes	Subtotal
Apple	Apple	8.00	6.00	Value Added Tax (VAT) 10%	\$ 48.00

Untaxed Amount: \$ 48.00  
VAT 10%: \$ 4.80  
Total: \$ 52.80

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

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

## Confirming a sales order

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

Recipients: Followers of the document and (Azure Interior) Add contacts to notify...

Subject: VN Company Order (Ref S00050)

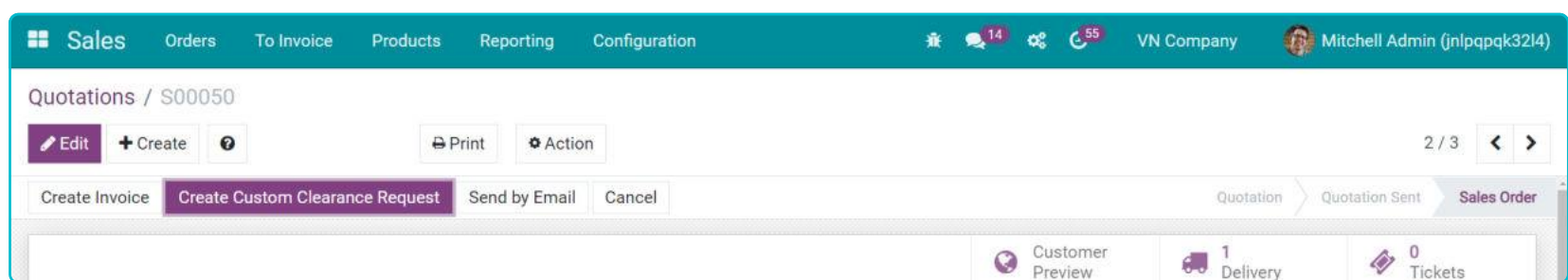
Hello,  
Your order S00050 amounting in \$ 340.00 has been confirmed.  
Thank you for your trust!  
Do not hesitate to contact us if you have any questions.

Attachments: S00050.pdf

Buttons: Send, Cancel, Save as new template

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.

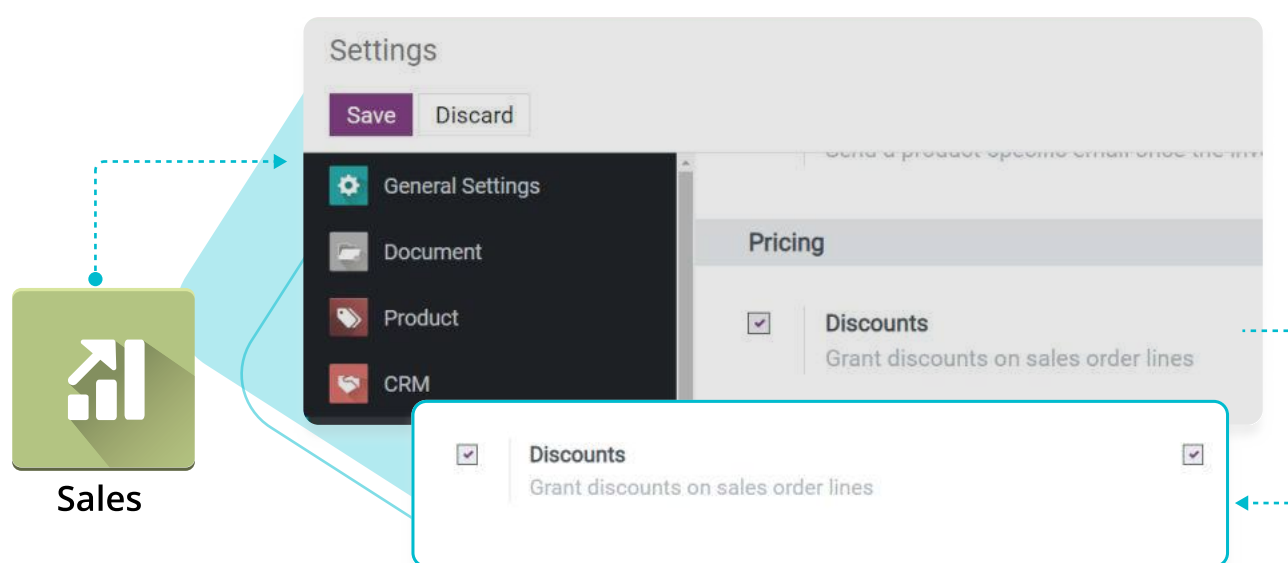


## Applying discounts to a sales order

In many situations, a business might want to give discounts to their customers and Viindoo has just the right tool to assist you.

### Activate the Discounts feature

Navigate to the **Sales app** ▶ **Configuration** ▶ **Settings**. Go to the **Pricing** section to activate the **Discounts** feature:



Press **Save** to finish.

### Apply Discount to the sales order

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:



Sales
Orders
To Invoice
Products
Reporting
Configuration
VN Company
Mitchell Admin (jnlppqk3214)

Quotations / S00044

Edit
+ Create
Print
Action

Create Invoice
Create Custom Clearance Request
Send by Email
Cancel

Quotation
Quotation Sent
Sales Order

Quotation Template
Default Template

Order Lines
Other Info
Customer Signature

#	Product	Dependency	Description	Quantity	Delivered	Invoiced	UoM	Unit Price	Tax...	Disc.%	Subtotal
10	[FURN_0005] Ma...		[FURN_0005] Magnetic Board	1.00	0.00	0.00	Units	1.98		10.00	\$ 1.78
10	[E-COM06] Corner...		[E-COM06] Corner Desk Right Sit	1.00	0.00	0.00	Units	147.00		0.00	\$ 147.00

Add a product
Add a section
Add a note

Disc.%
10,00

## RECORD PAYMENT

➔ See details at:

- Record customer payment from Sales order.

## TRACK THE DELIVERY AND ISSUE INVOICE

### Track the delivery

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

Sales
Orders
To Invoice
Products
Reporting
Configuration
VN Company

Quotations / S00050

Save
Discard

Create Invoice
Create Custom Clearance Request
Send by Email
Cancel

Quotation
Quotation Sent
Sales Order

Payment Terms

Invoice Address
Azure Interior

Delivery Address
Azure Interior

Quotation Template
Default Template

Order Lines
Other Info
Customer Signature

#	Product	Dependency	Description	Quantity	Delivered	Invoiced	UoM	Unit Price	Tax...	Disc.%	Subtotal
10	[FURN_1118] Cor...		[FURN_1118] Corner Desk Left Sit	4.00	0.00	0.00	Units	85.00		0.00	\$ 340.00

Add a product
Add a section
Add a note

2 Delivery

Delivered
2,00

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

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

### Tracking invoicing status

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

Order Lines
Other Info
Customer Signature

#	Product	Dependency	Description	Quantity	Delivered	Invoiced	UoM	Unit Price	Tax...	Disc.%	Subtotal
10	[FURN_1118] Cor...		[FURN_1118] Corner Desk Left Sit	4.00	2.00	2.00	Units	85.00		0.00	\$ 340.00

Add a product
Add a section
Add a note

Invoiced
2,00

Optimize costs & resources, enhance supply efficiency



Real-time Inventory

Automatically update inventory as 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

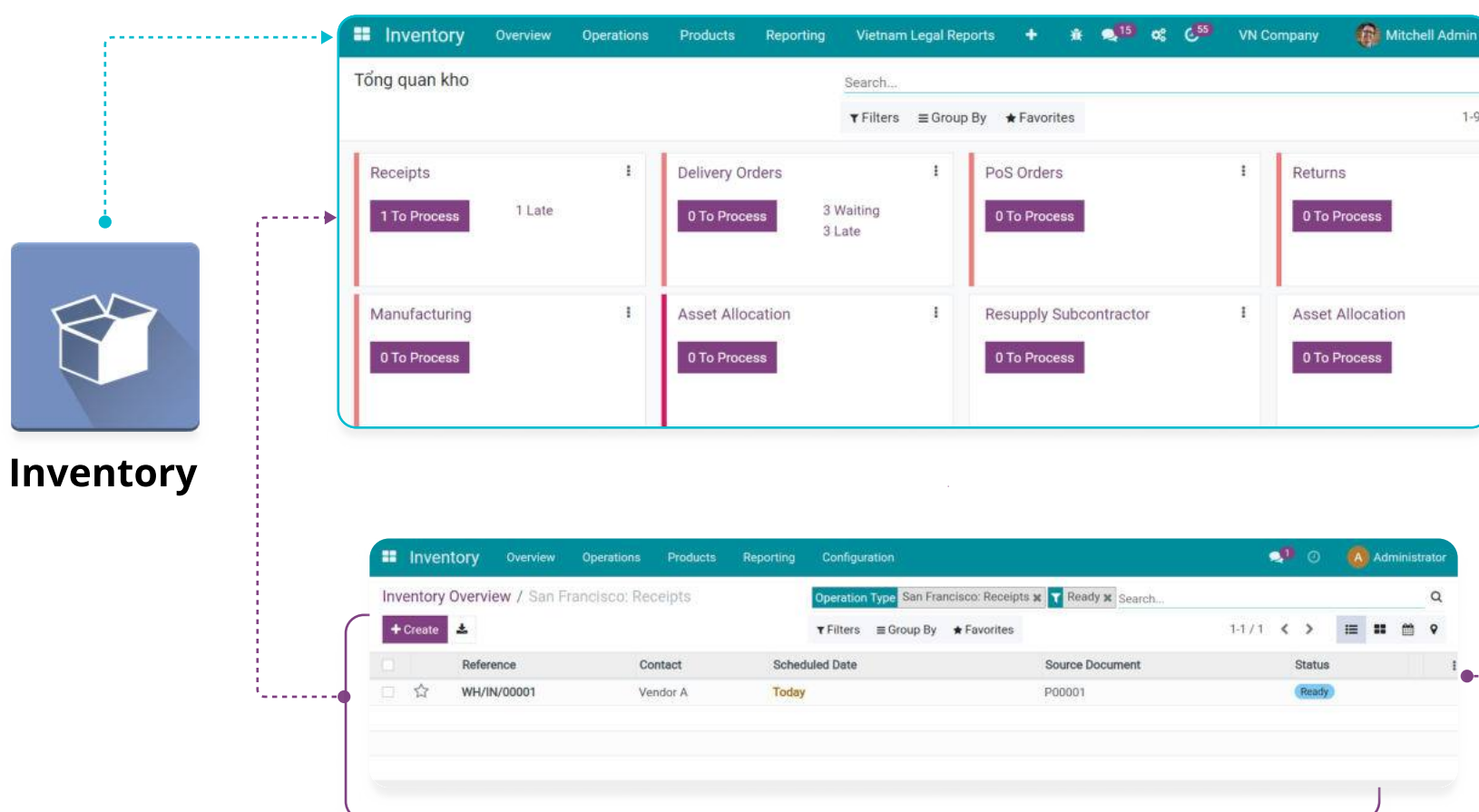
Adjust the inventory cycle to improve inventory investment turnover




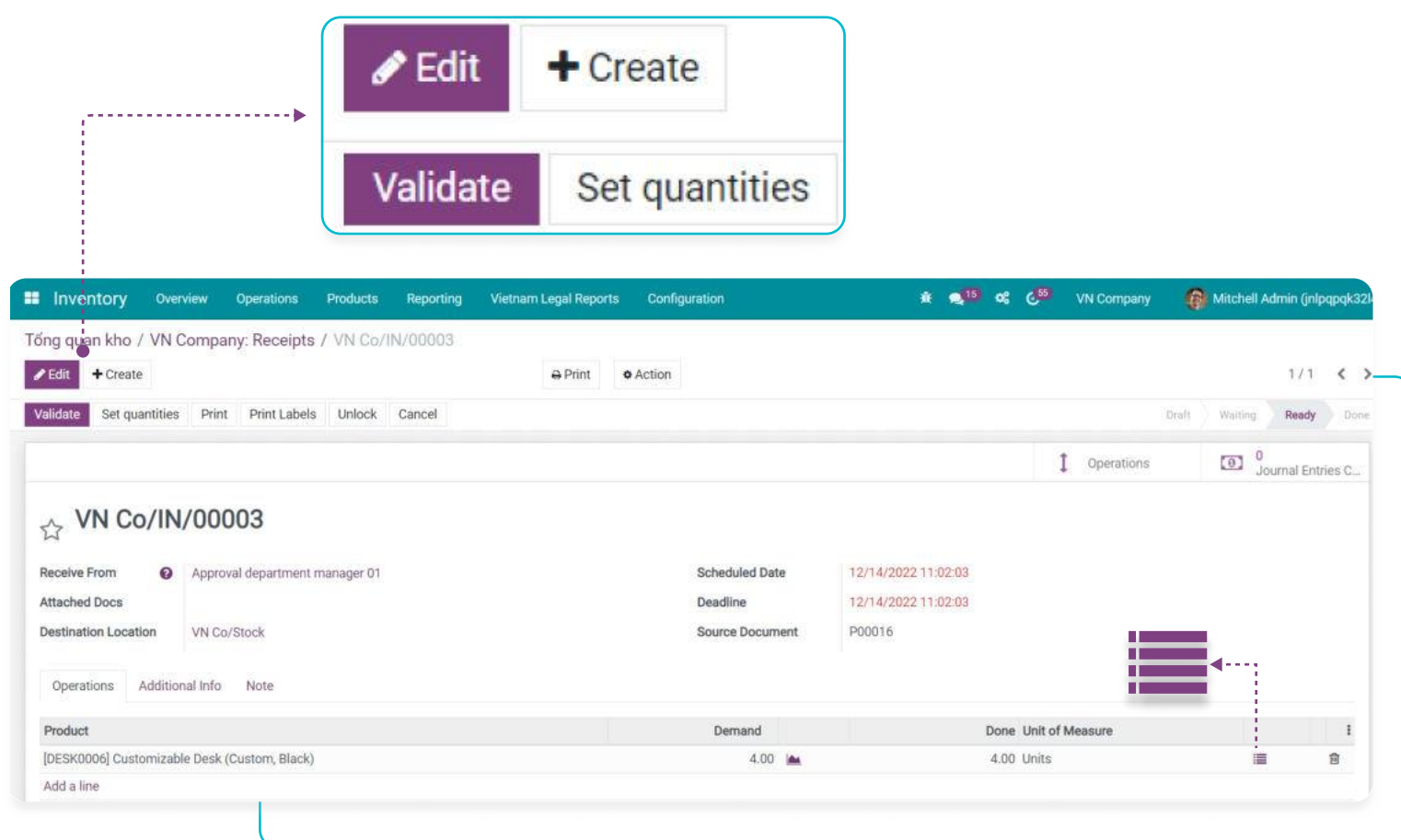
## PROCESS INCOMING PRODUCTS

### 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.

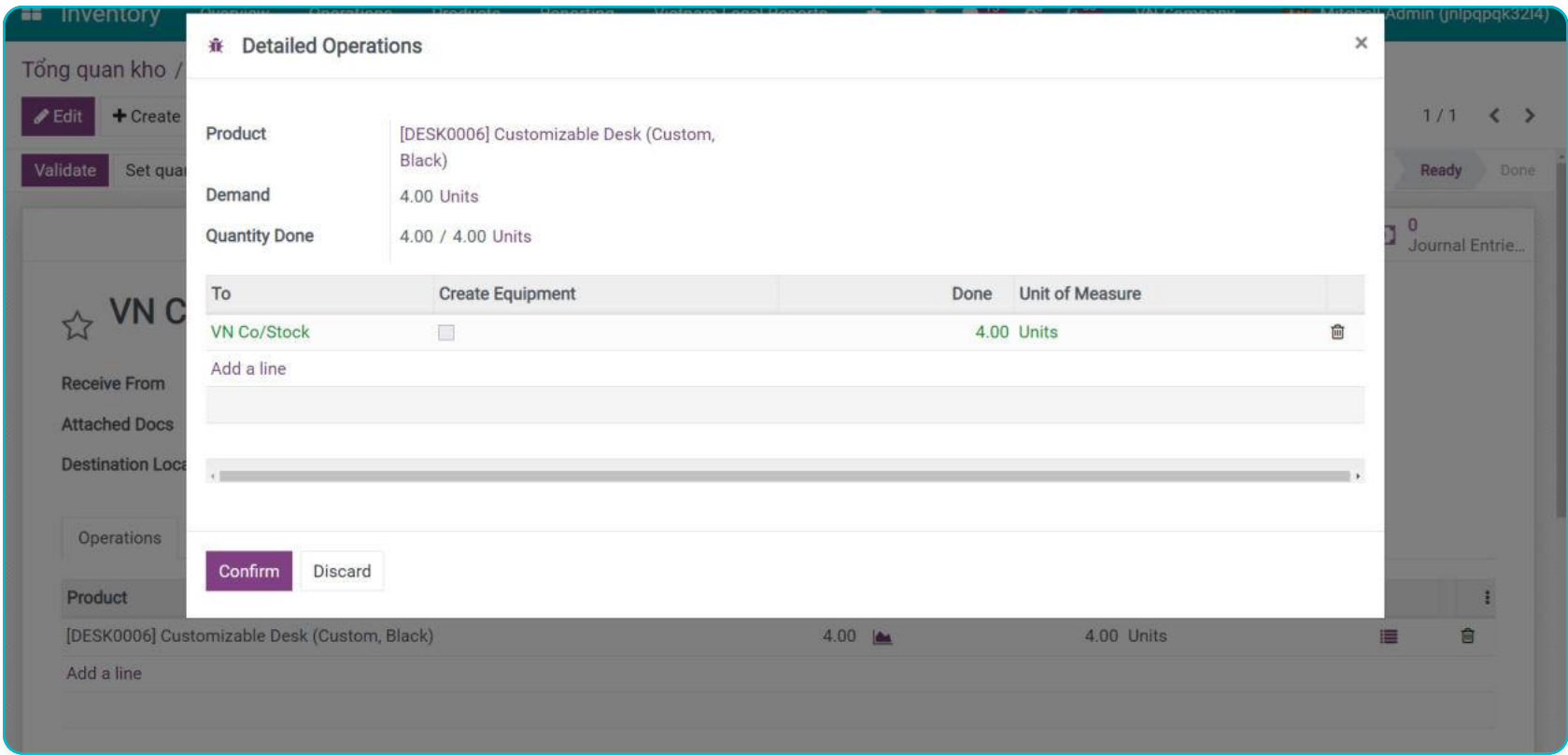


**Step 2:** Click on the warehouse receipt. From here, press **Edit** and click on the  icon to record the received quantity. Then press **Confirm**.





**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*.

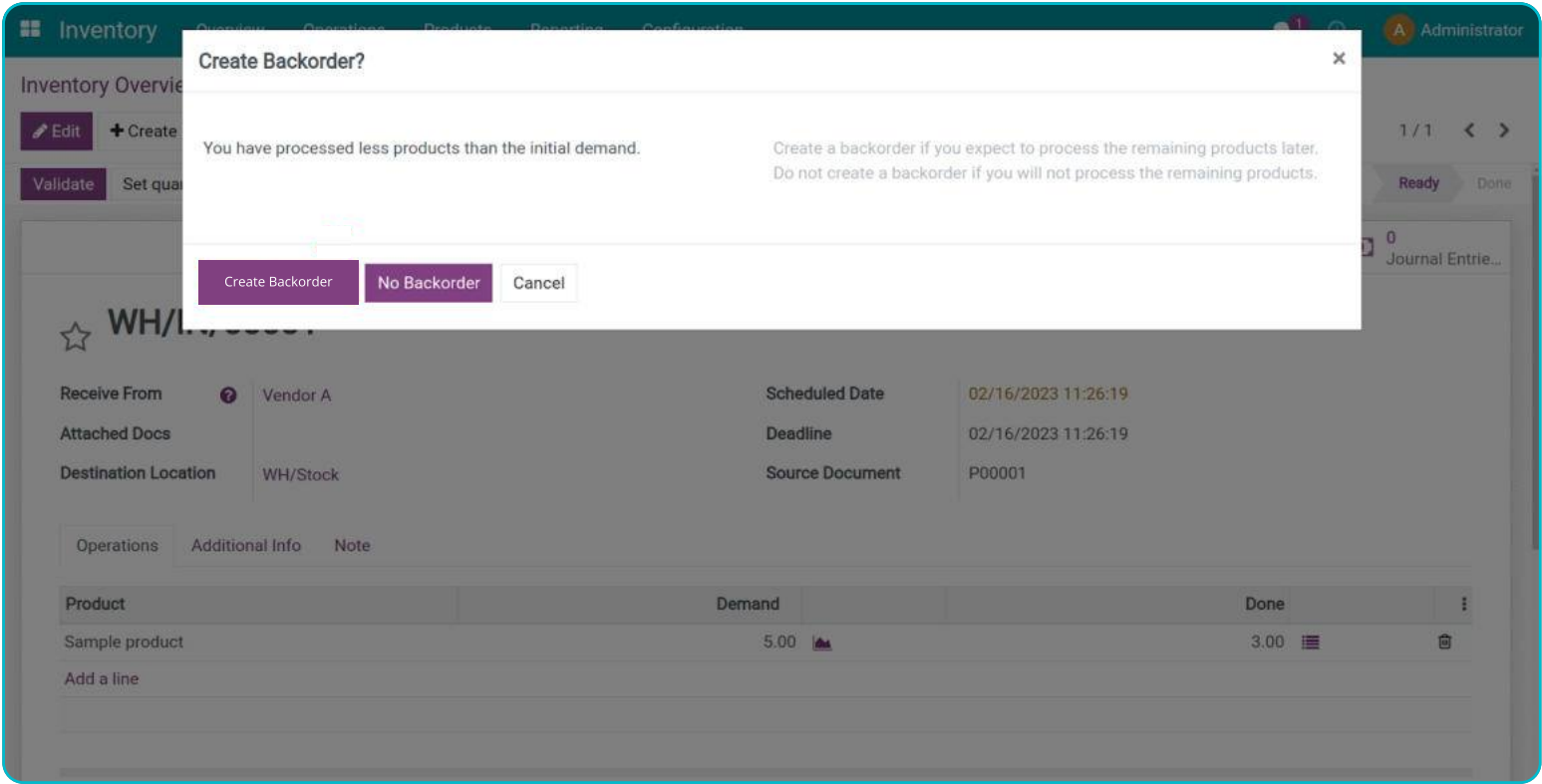


Receive products in multiple orders

❗

Note

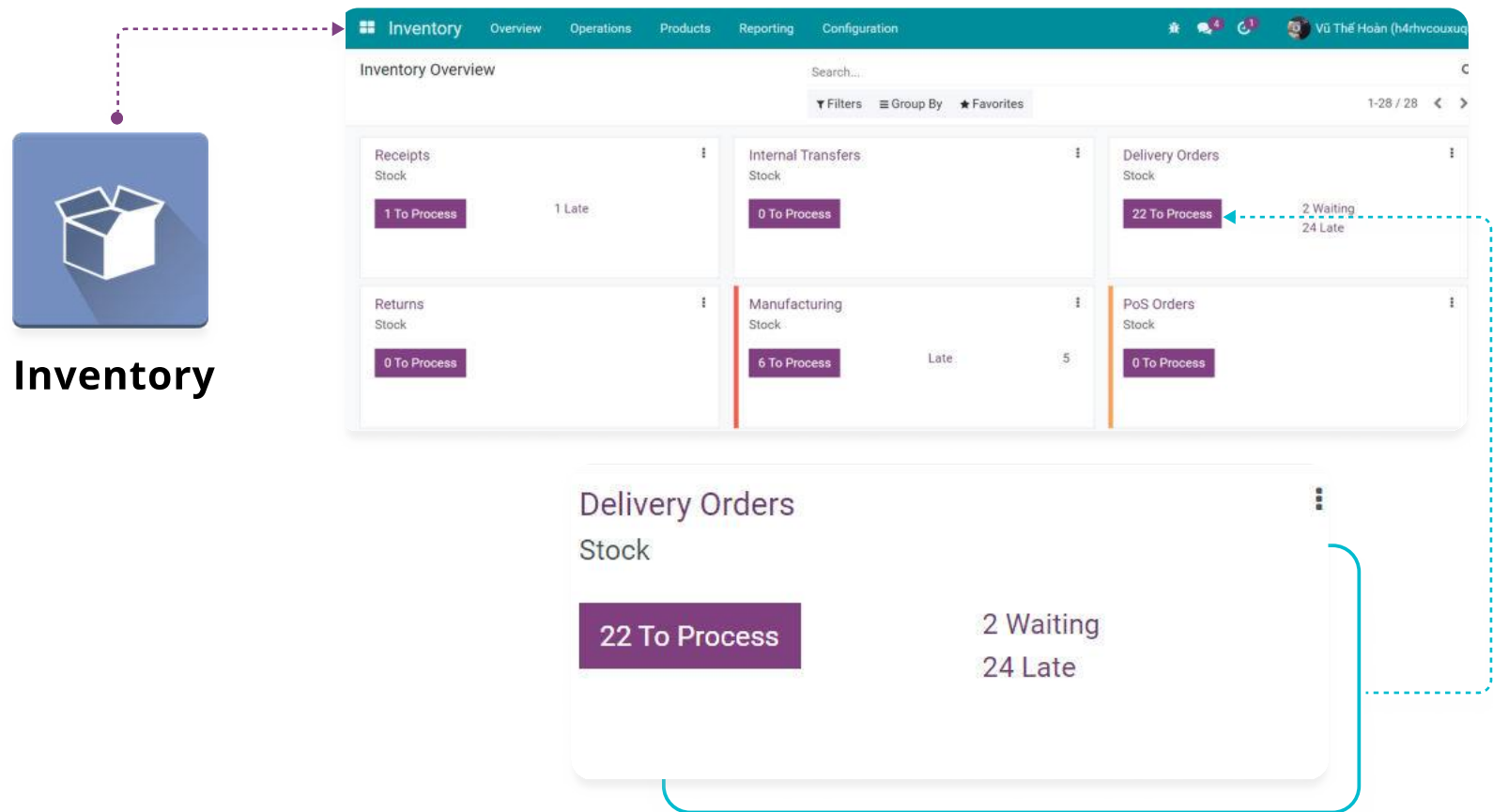
When the vendor delivers your order in various deliveries, proceed the similar steps as when you receive goods all at once. However, in **step 3**, after confirming the inventory receipt transfer, a pop-up window will be displayed, click **Create Backorder** to generate the transfer slip for the rest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



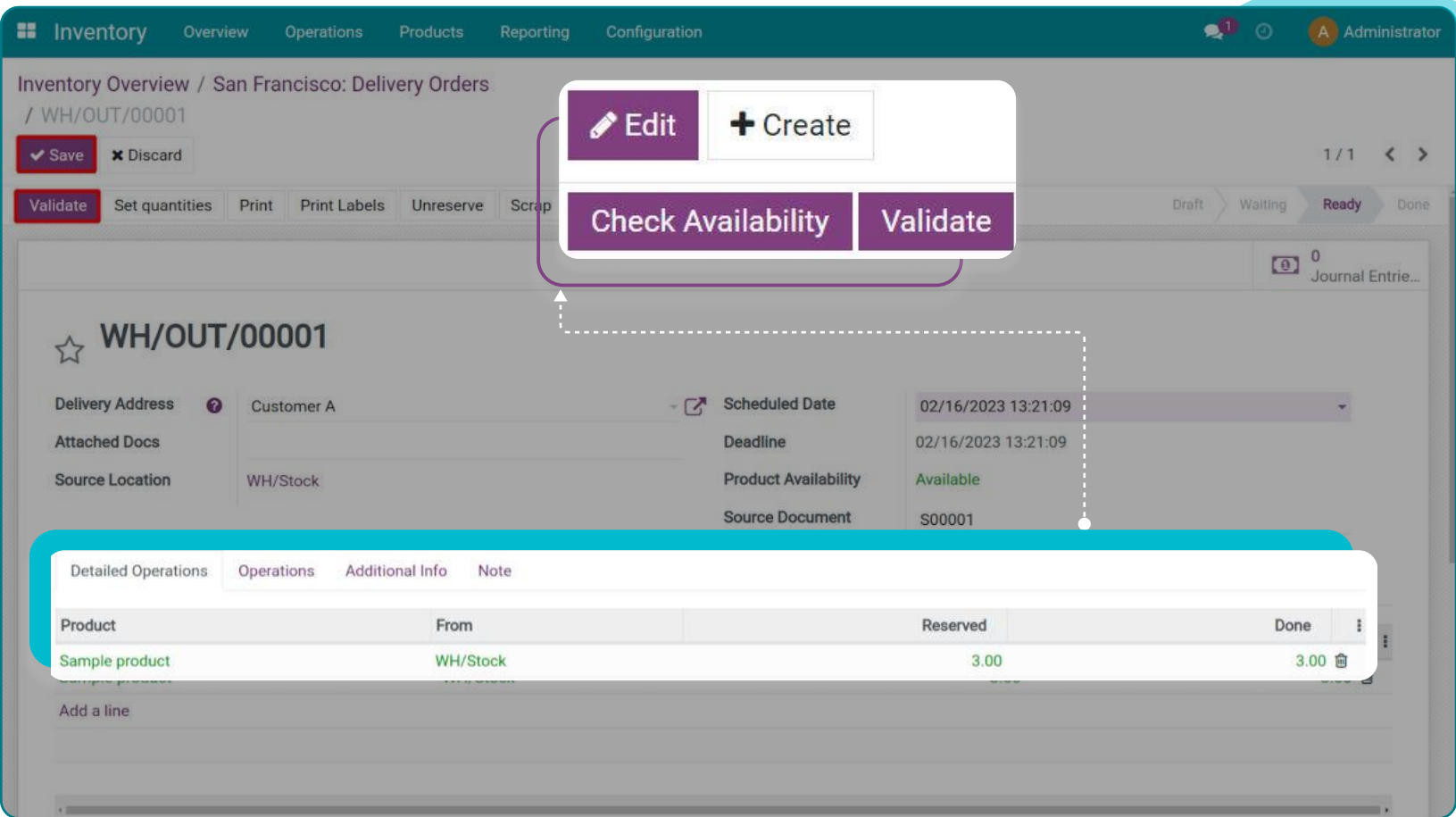
DELIVER PRODUCTS

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.



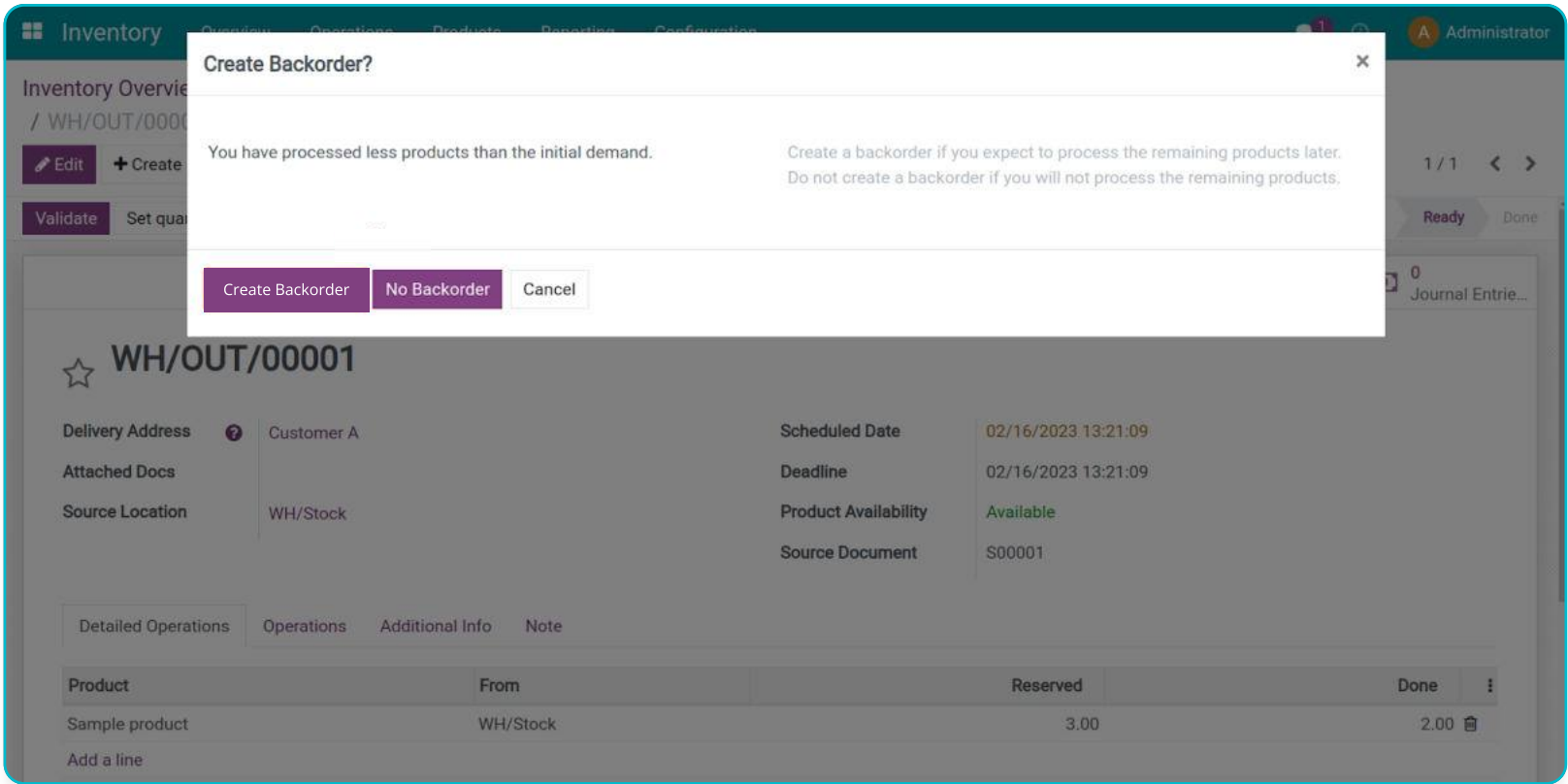
**Step 2:** Click on the delivery order. Then, press **Edit**, at the **Detailed Operations** tab, and add the number of delivered quantities. Then press **Save ► Confirm**.



Delivery products in multiple orders

Note

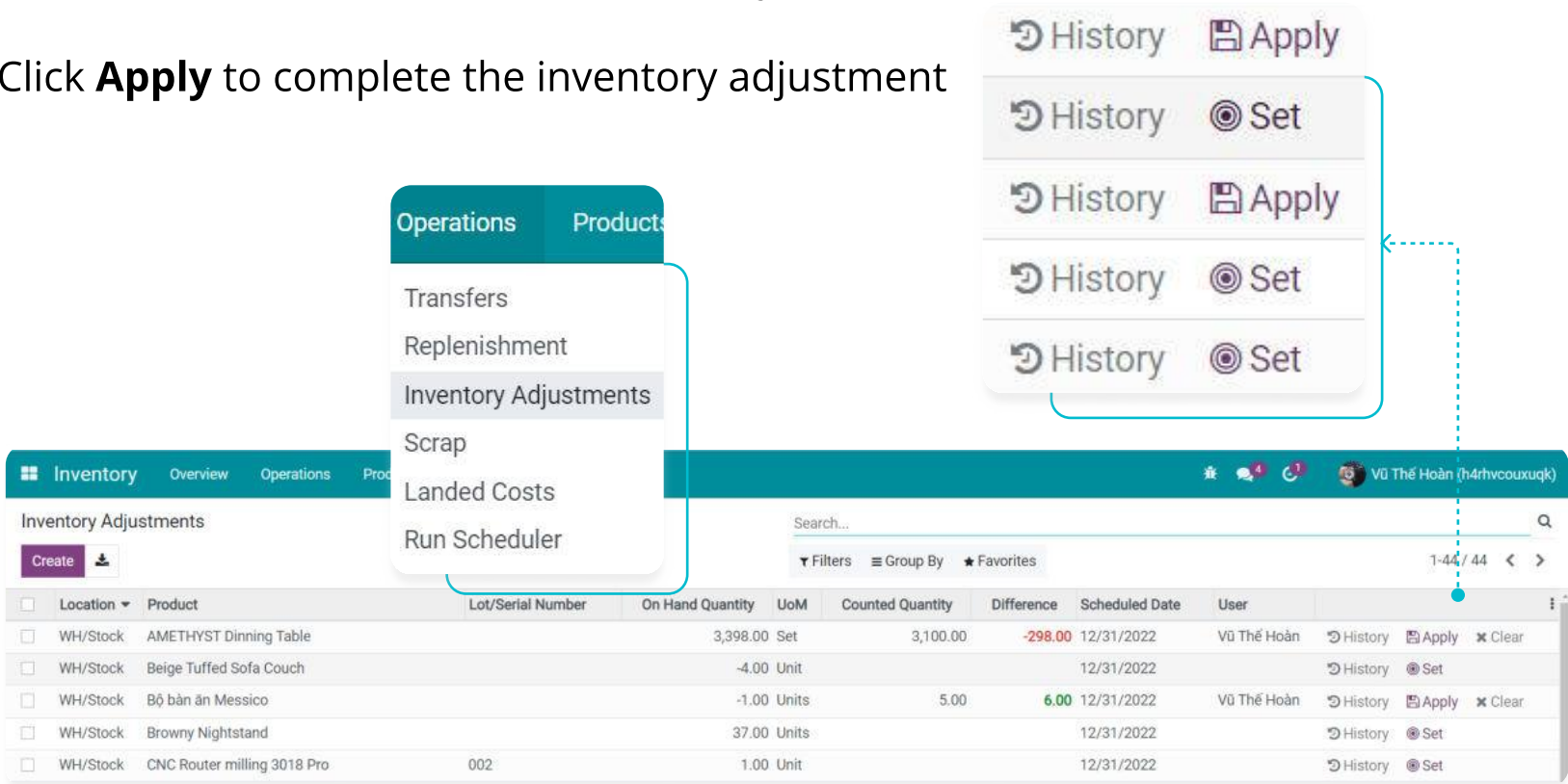
When you deliver your order in multiple deliveries, proceed the similar steps as when you deliver products all at once. However, in **step 2**, after confirming the inventory delivery order, a pop-up window will be displayed, click **Create Backorder** to generate the transfer slip for the rest of your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



INVENTORY ADJUSTMENT

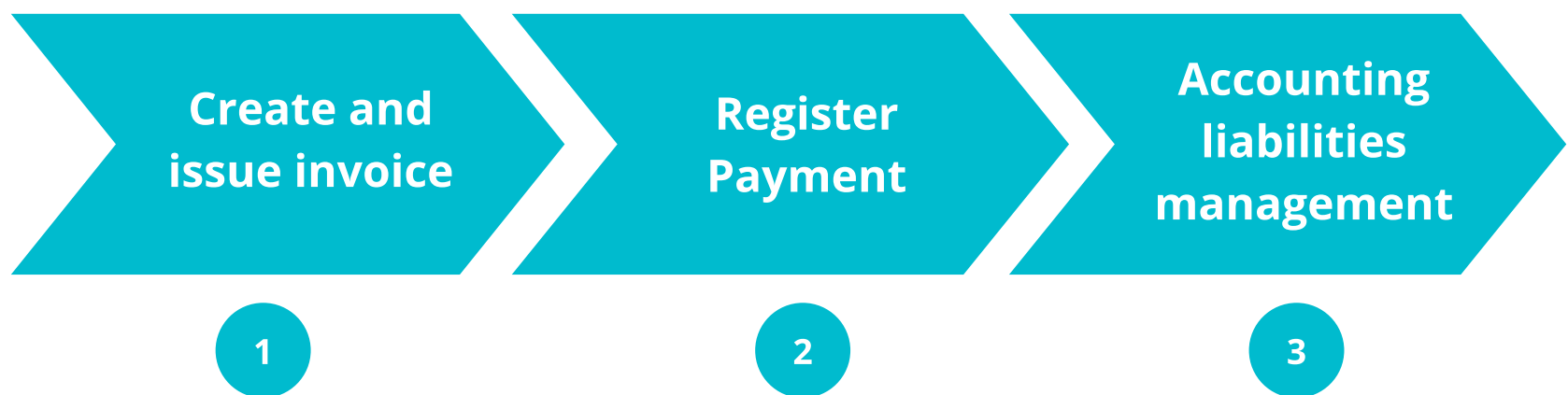
When doing the inventory adjustment, go to **Inventory » Operations » Inventory Adjustments**, add the actual quantity in the **Counted Quantity** column, the **Difference** amount will be automatically calculated.

Click **Apply** to complete the inventory adjustment

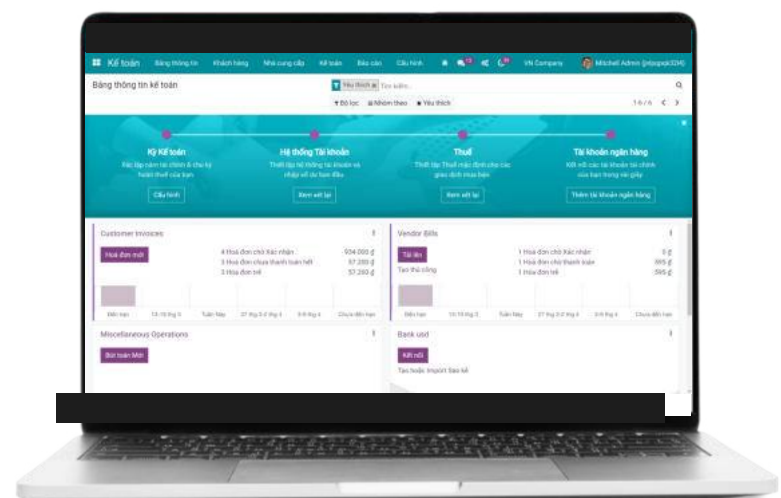




## LIABILITIES ACCOUNTING MANAGEMENT



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.



## 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.

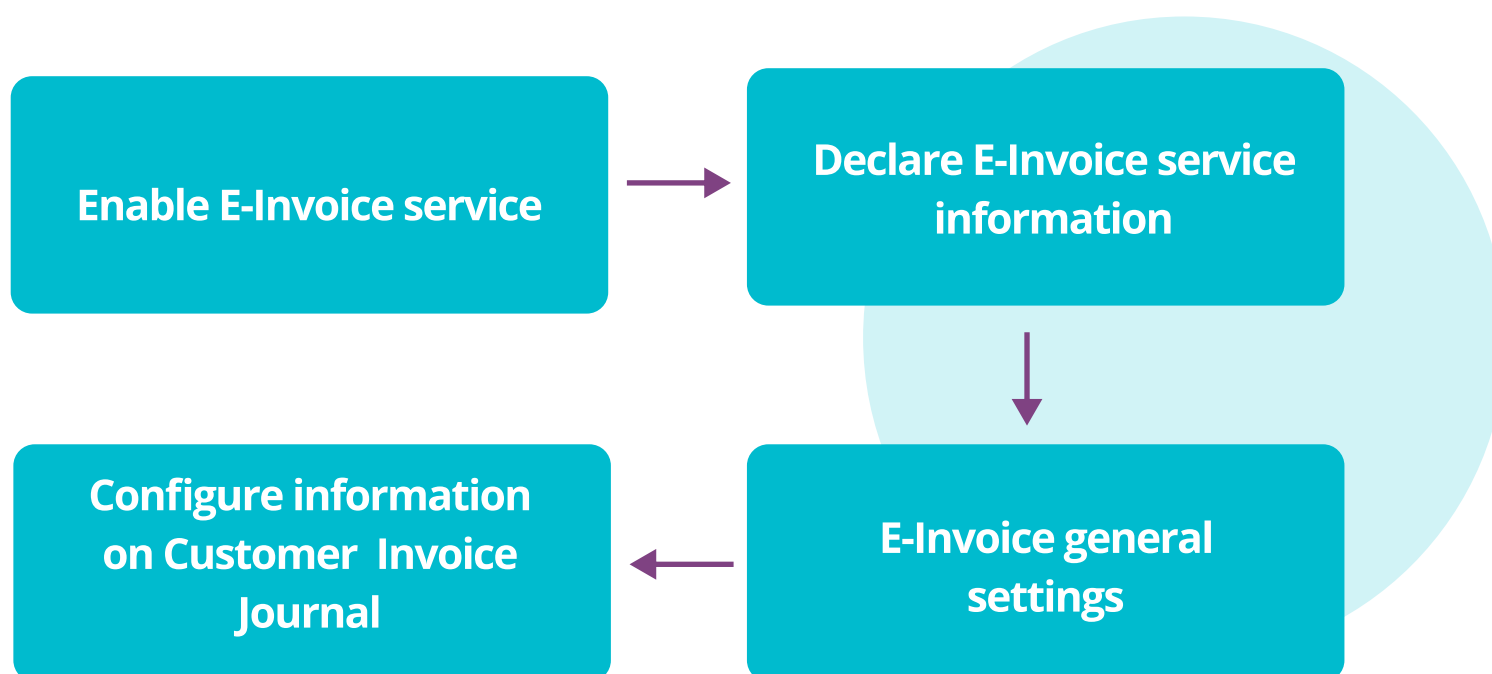
**Issue internal invoices on Viindoo software:** If you only want to monitor internal liabilities on the system or use another platform to issue E-invoices.

➡ See details at:

- [Create customer invoices](#)

### Issue E-Invoices to customers

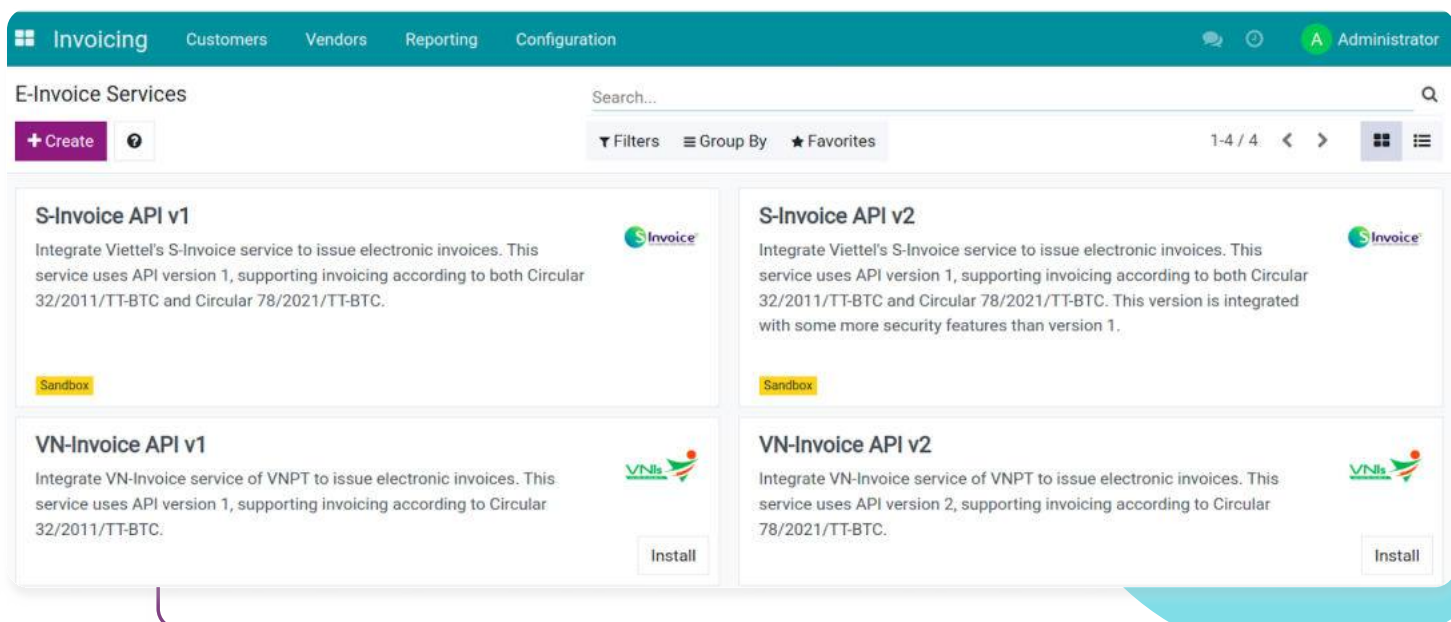
#### *Integrate E-Invoice service*



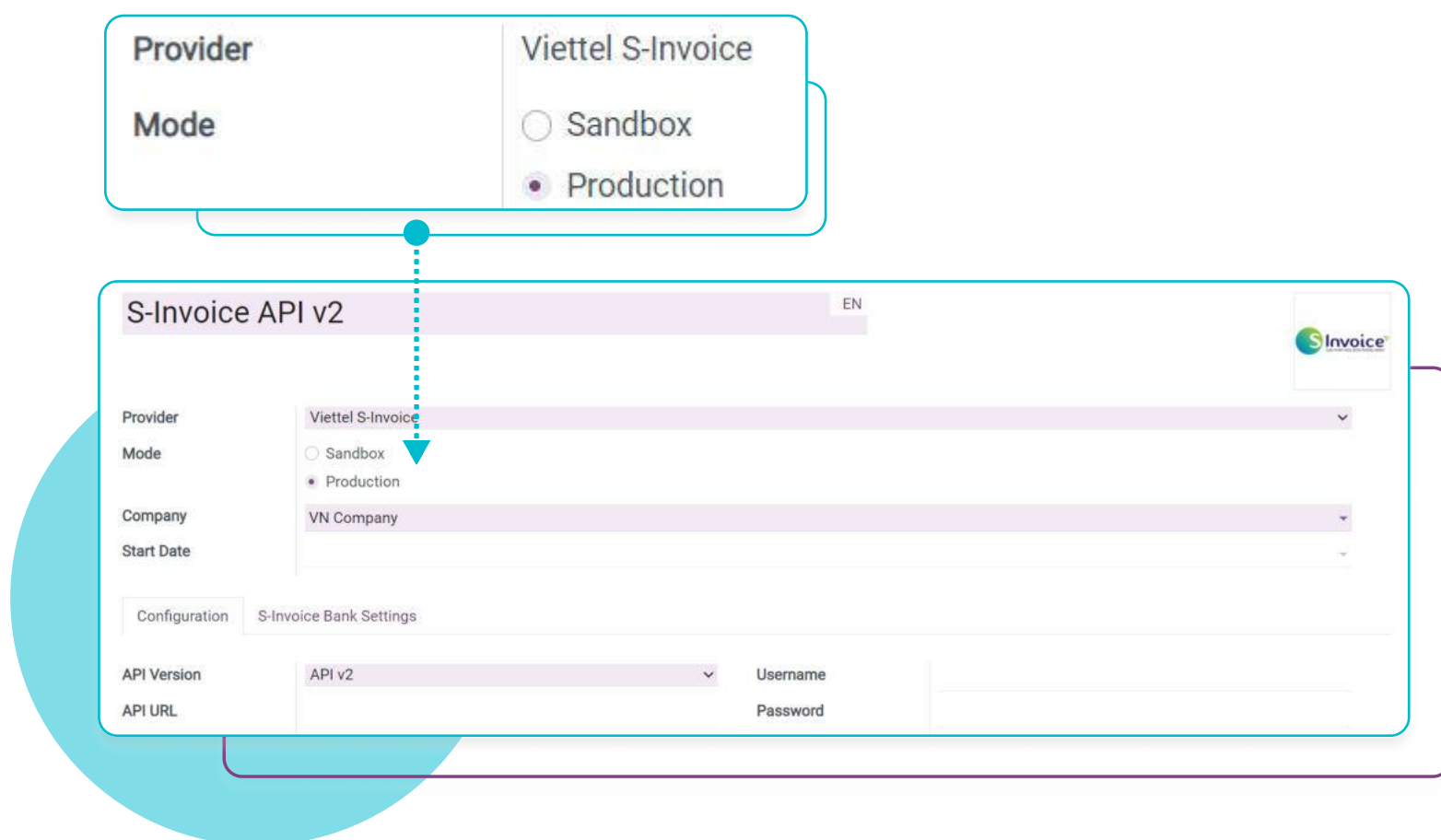
#### **Step 1:** *Enable E-invoice service*

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.



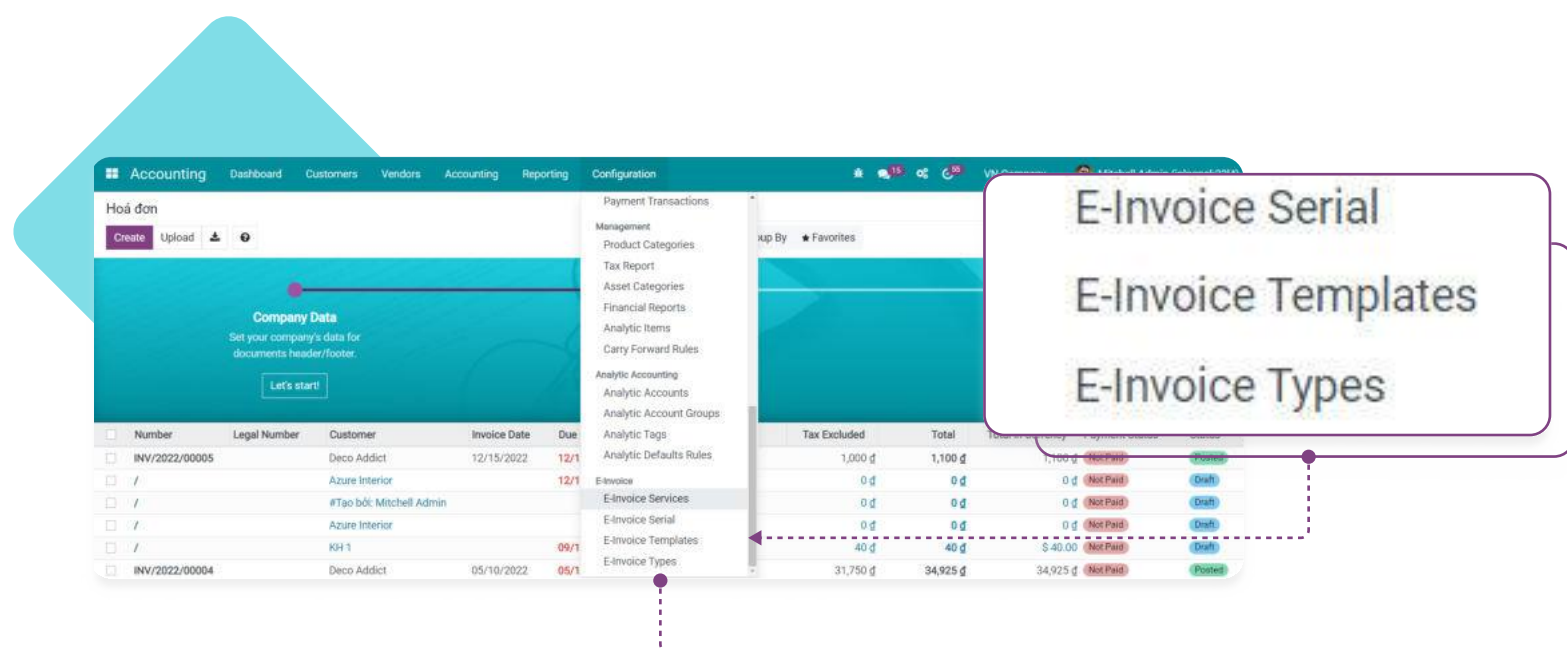
Select the **Production** mode, add the service information for the *API URL*, *Username*, and *Password fields*. This information will be provided either by S-Invoice or VN-Invoice when you register with any of them.



## Step 2: Declare E-Invoice service information

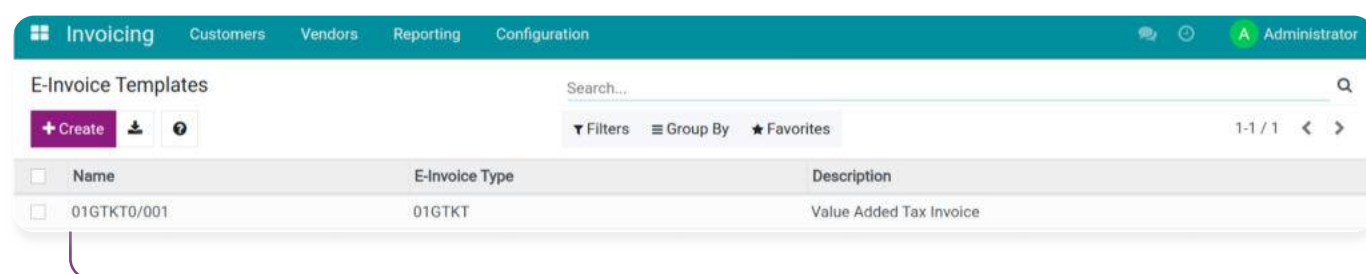
To declare information such as Serial, Templates and Types, navigate to **Invoicing ► Configuration ► E-Invoices**





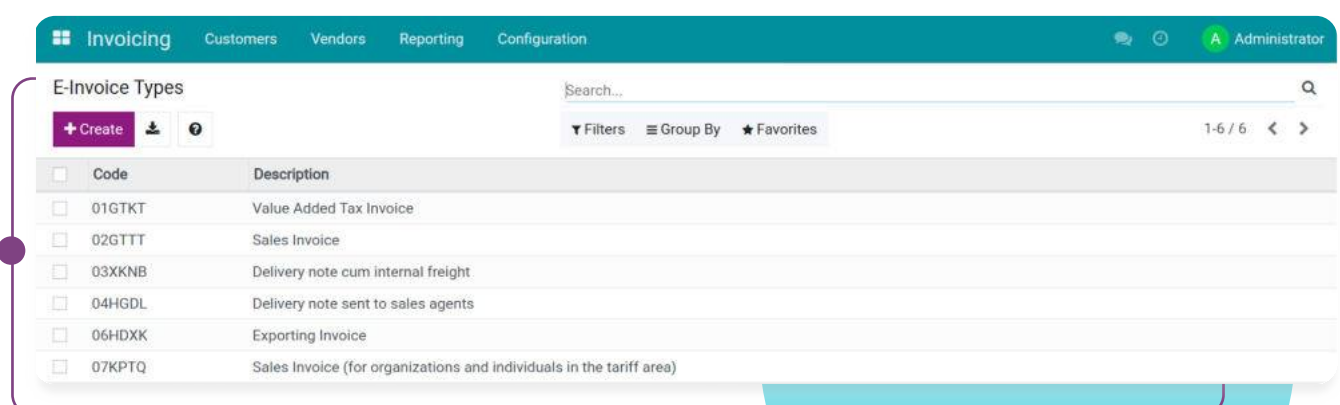
### Declare E-Invoice Templates

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.



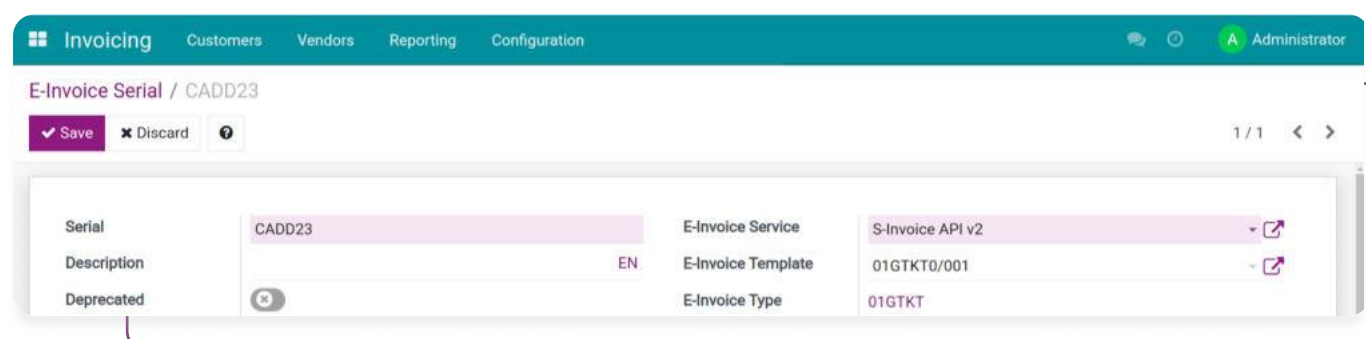
### Declare E-Invoice Types

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



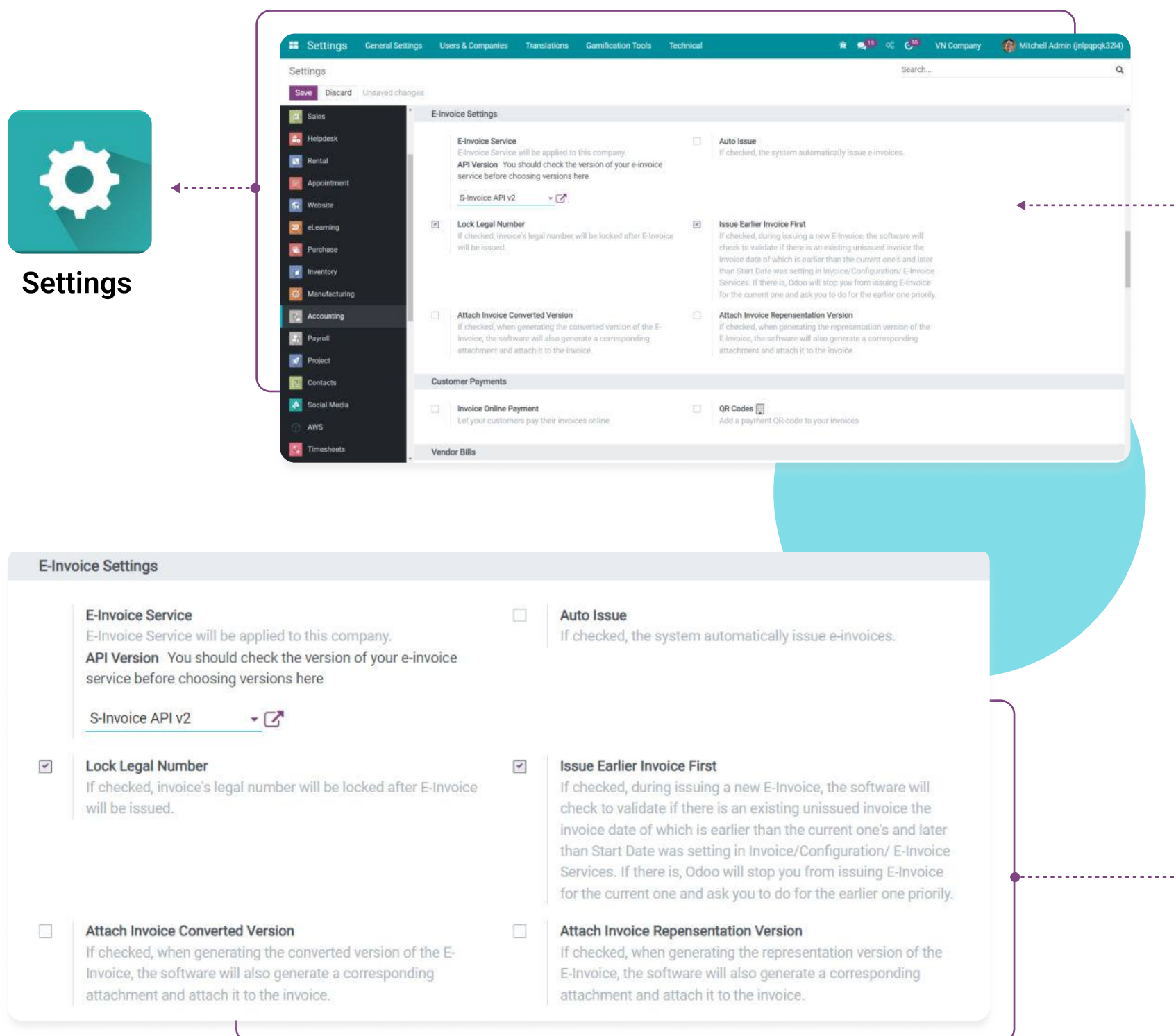
### Declare E-Invoice Serial

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.

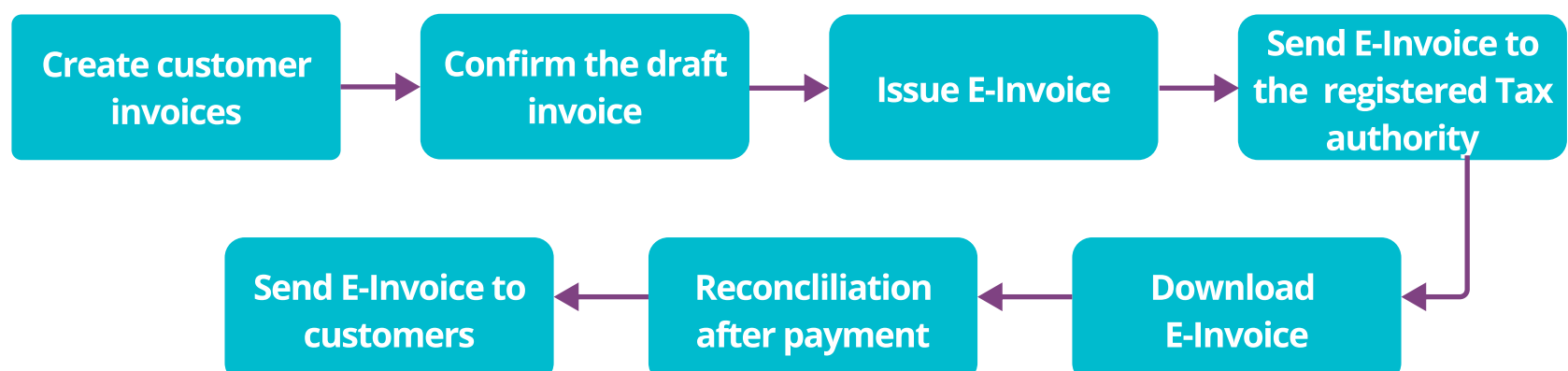
The screenshot shows the 'E-Invoice Integration' tab in the 'Customer Invoice' journal configuration. The 'E-Invoice' section includes several settings:

- E-Invoice Disabled:** ☐
- Auto Issue:** ☐
- E-Invoice Item:** Invoice Line Description
- Disable Send E-Invoice PDF by email:** ☐
- E-Invoice Send Mail/Portal option:** Display Version
- E-Invoice Serial:** K22THS
- E-Invoice Template:** 1/100
- E-Invoice Type:** 01GTKT

A callout box highlights the 'E-Invoice Serial', 'E-Invoice Template', and 'E-Invoice Type' fields, which are set to K22THS, 1/100, and 01GTKT respectively.

- *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



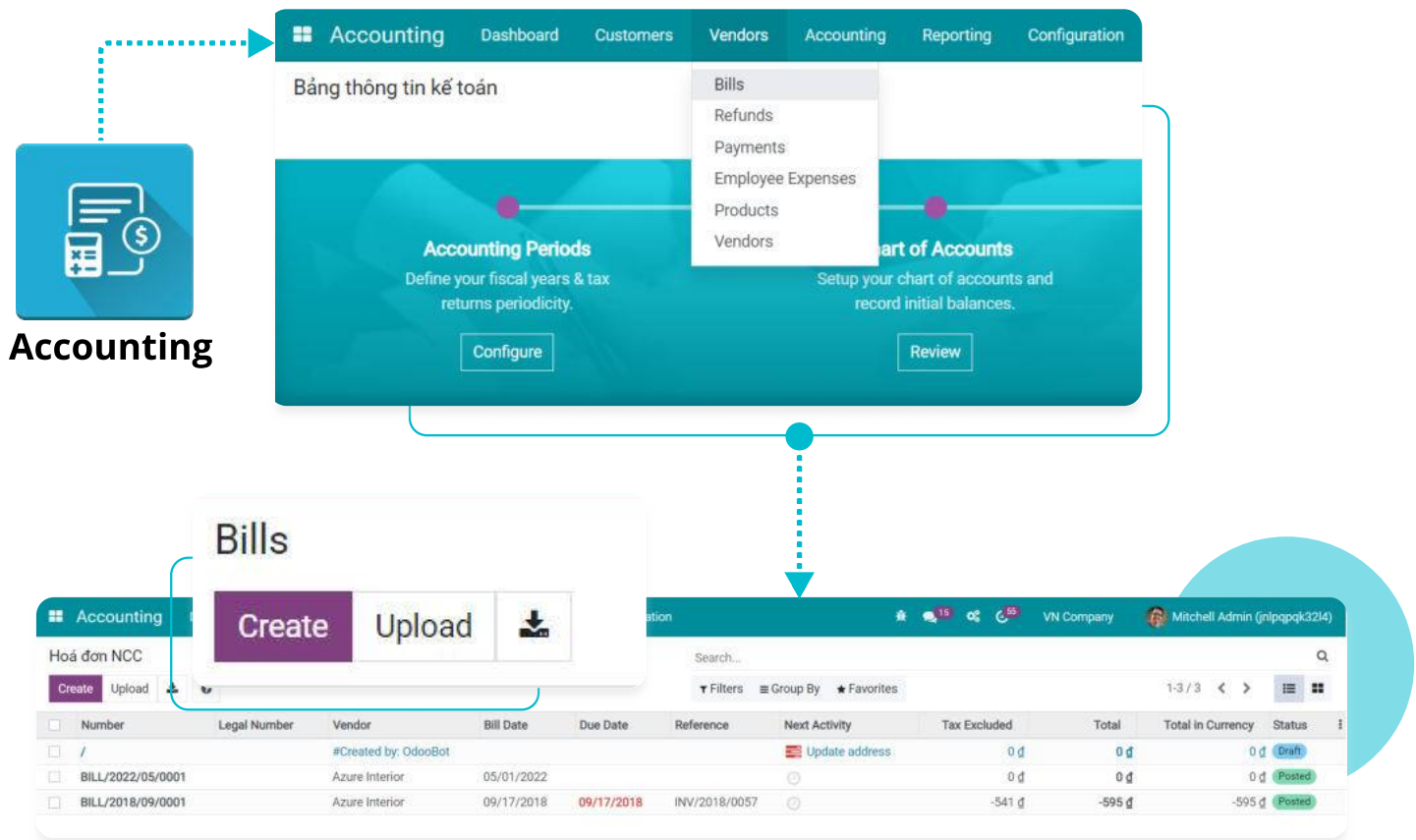
➔ See details at:

- *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.

A screenshot of the 'Bills / New' form in the software. At the top, there are 'Save' and 'Discard' buttons. Below them is a 'Confirm' button. The form contains several input fields: 'Vendor Bill' (with value 'BILL/2023/04/0001'), 'Legal Number...', 'Vendor' (with a dropdown showing 'Azure Interior' and its address), 'Bill Reference', 'Payment Reference', 'Recipient Bank', and 'Auto-Complete' (with a dropdown showing 'Select a purchase order or an old bill'). On the right side, there are fields for 'Bill Date', 'Accounting Date', 'Due Date', and 'Journal'. At the bottom, there are tabs for 'Invoice Lines', 'Journal Items', 'Other Info', and 'Counterparts Mapping'. The 'Invoice Lines' tab is active, showing a table with columns: Product, Dependency, Label, Landed Costs, Asset Categor..., Account, Analytic Acco..., Analytic Tags, Quantity, UoM, Price, Taxes, and Subtotal. The first row shows a product '[FURN\_0005] ...' with a quantity of 50.00 and a price of 300,000.00.

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

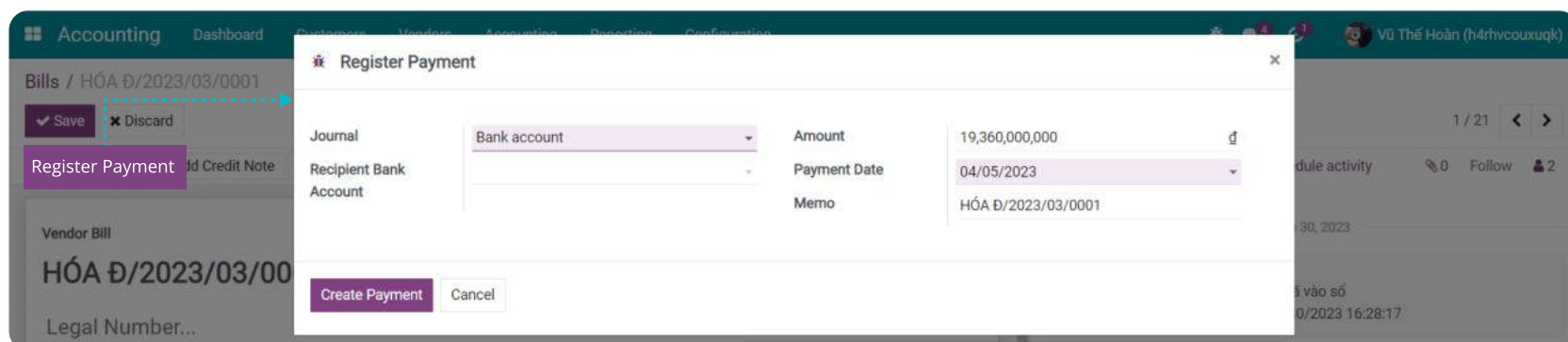
A screenshot of the 'Invoice Lines' table in the software. The table has columns: Product, Dependency, Label, Landed Costs, Asset Categor..., Account, Analytic Acco..., Analytic Tags, Quantity, UoM, Price, Taxes, and Subtotal. The first row shows a product '[FURN\_0005] ...' with a quantity of 50.00 and a price of 300,000.00. Below the table, there are buttons for 'Add a line', 'Add a section', and 'Add a note'.

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

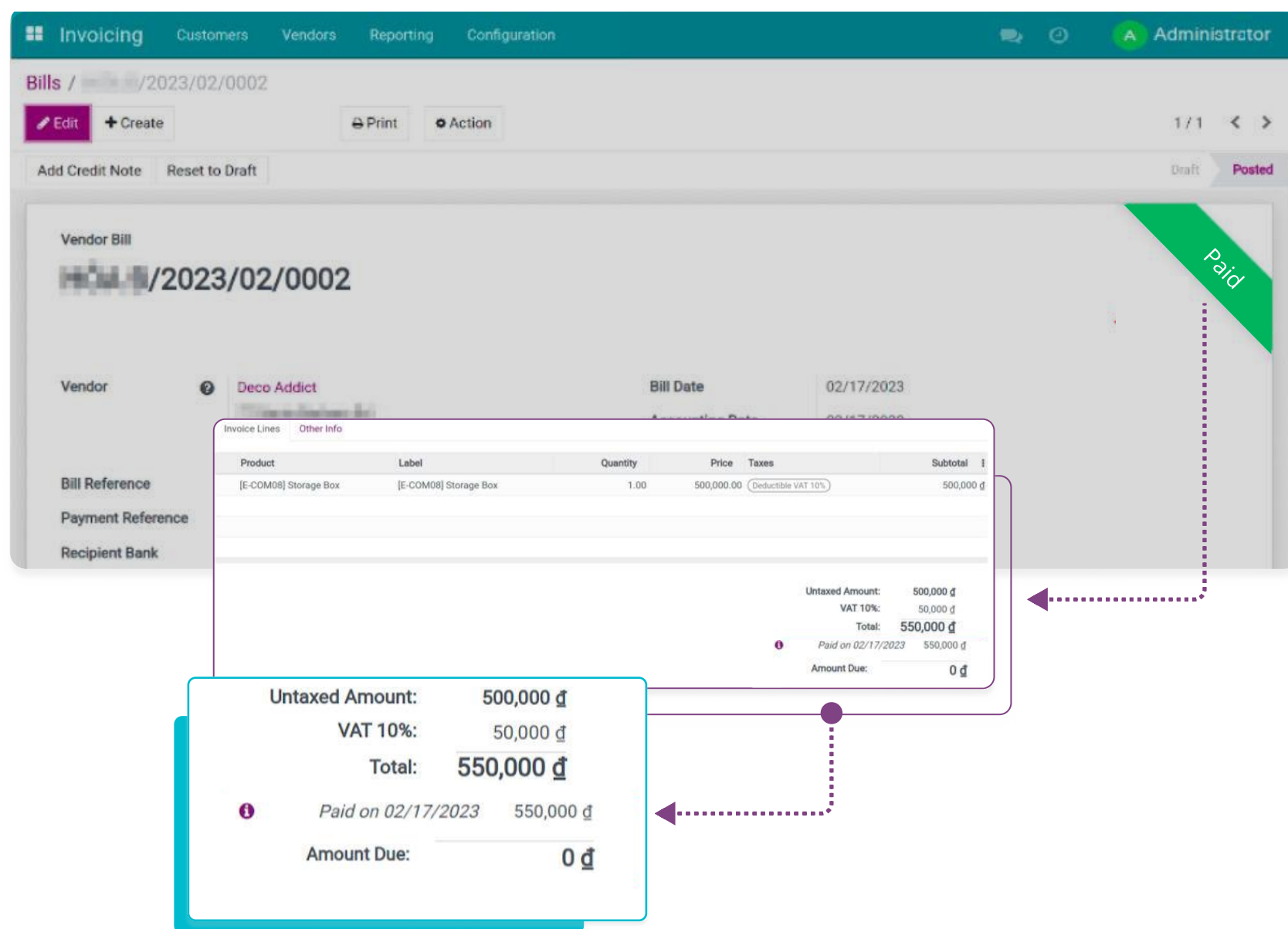
## REGISTER PAYMENT

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.

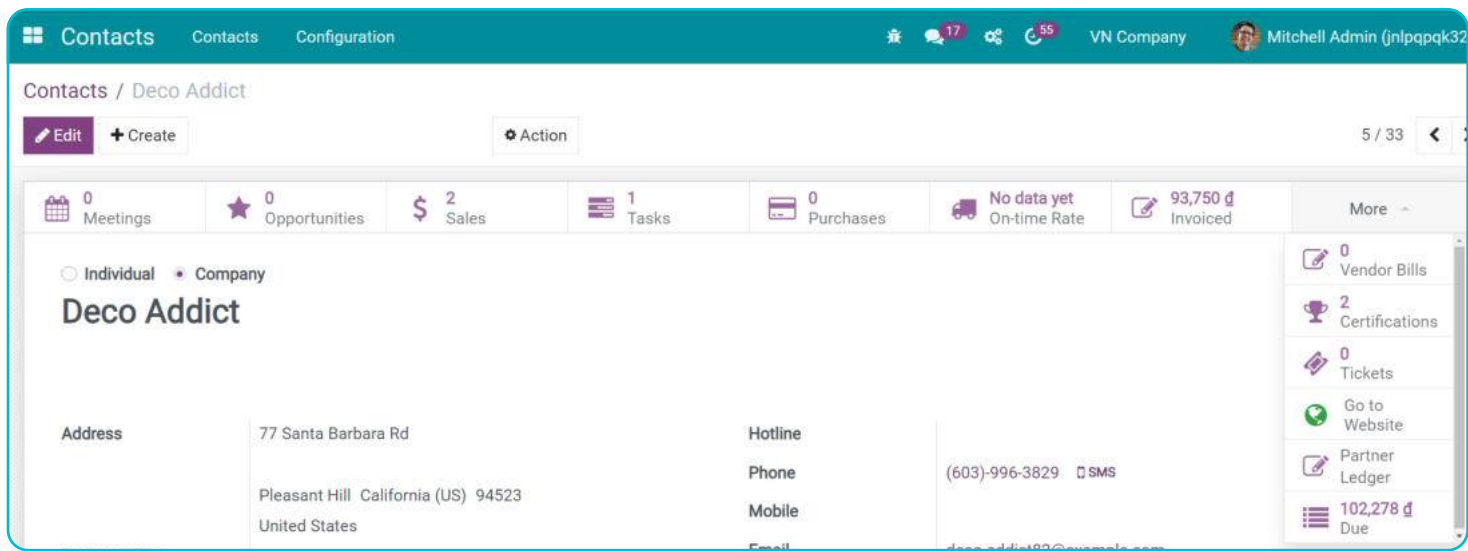


**Step 2:** Going back to the invoice, you will see the above payment reconciled directly to the invoice.



# 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 đ	0 đ	0 đ	19,360,000,000 đ	0 đ	19,360,000,000 đ
2023-03-30 ▼	HÓA Đ	331	1331, 151	HÓA Đ/2023/03/0001	0 đ	0 đ	0 đ	19,360,000,000 đ	0 đ	19,360,000,000 đ
► Phan Văn Đoàn					165,000,000 đ	0 đ	0 đ	0 đ	165,000,000 đ	0 đ
Total					165,000,000 đ	0 đ	0 đ	19,360,000,000 đ	165,000,000 đ	19,360,000,000 đ



## VISUAL REPORTS OF BUSINESS PERFORMANCE

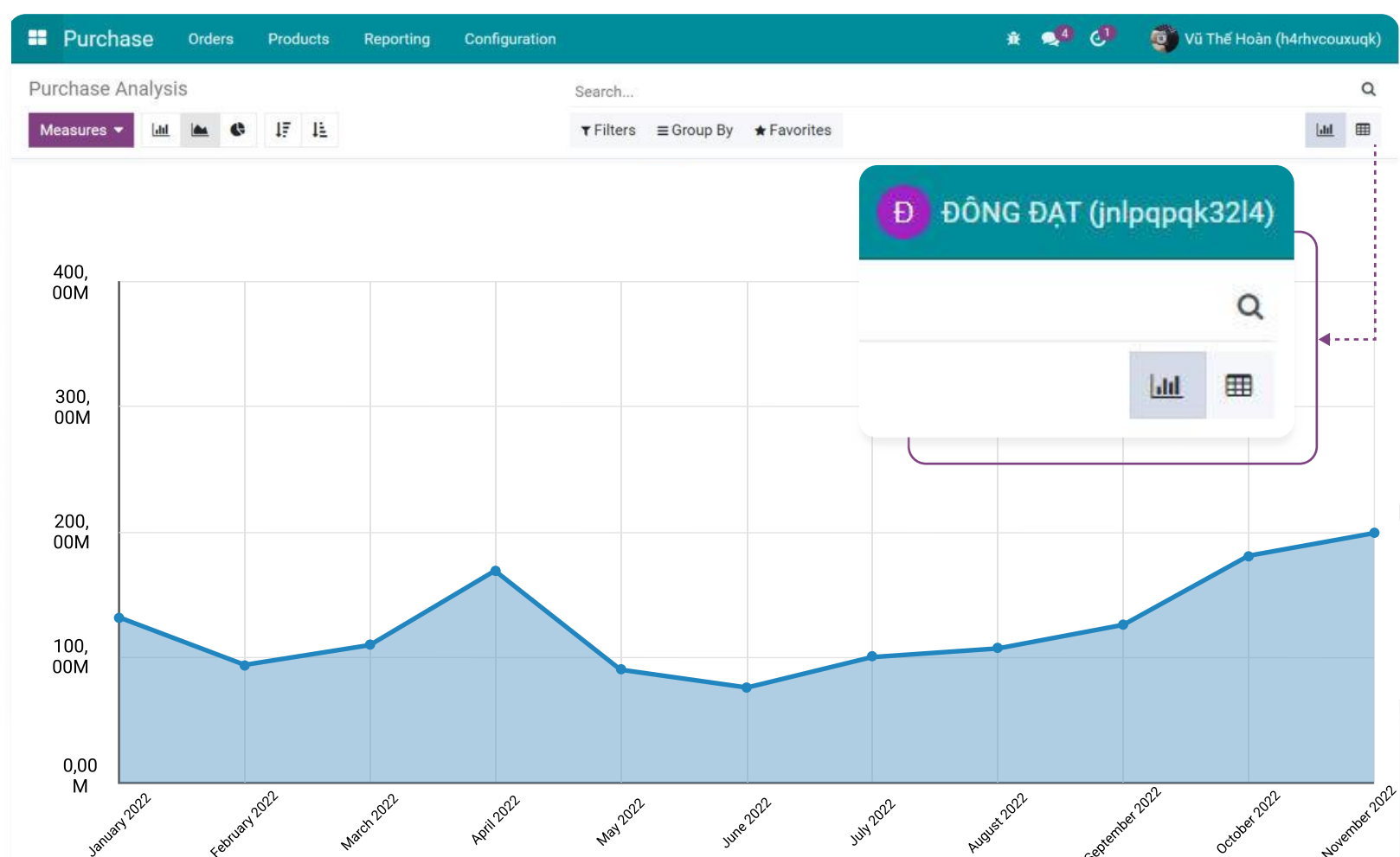
Data on Viindoo software is automatically aggregated into different types of reports. On the software modules, the managers can access the Reporting menu to view reports with updated data instantly.




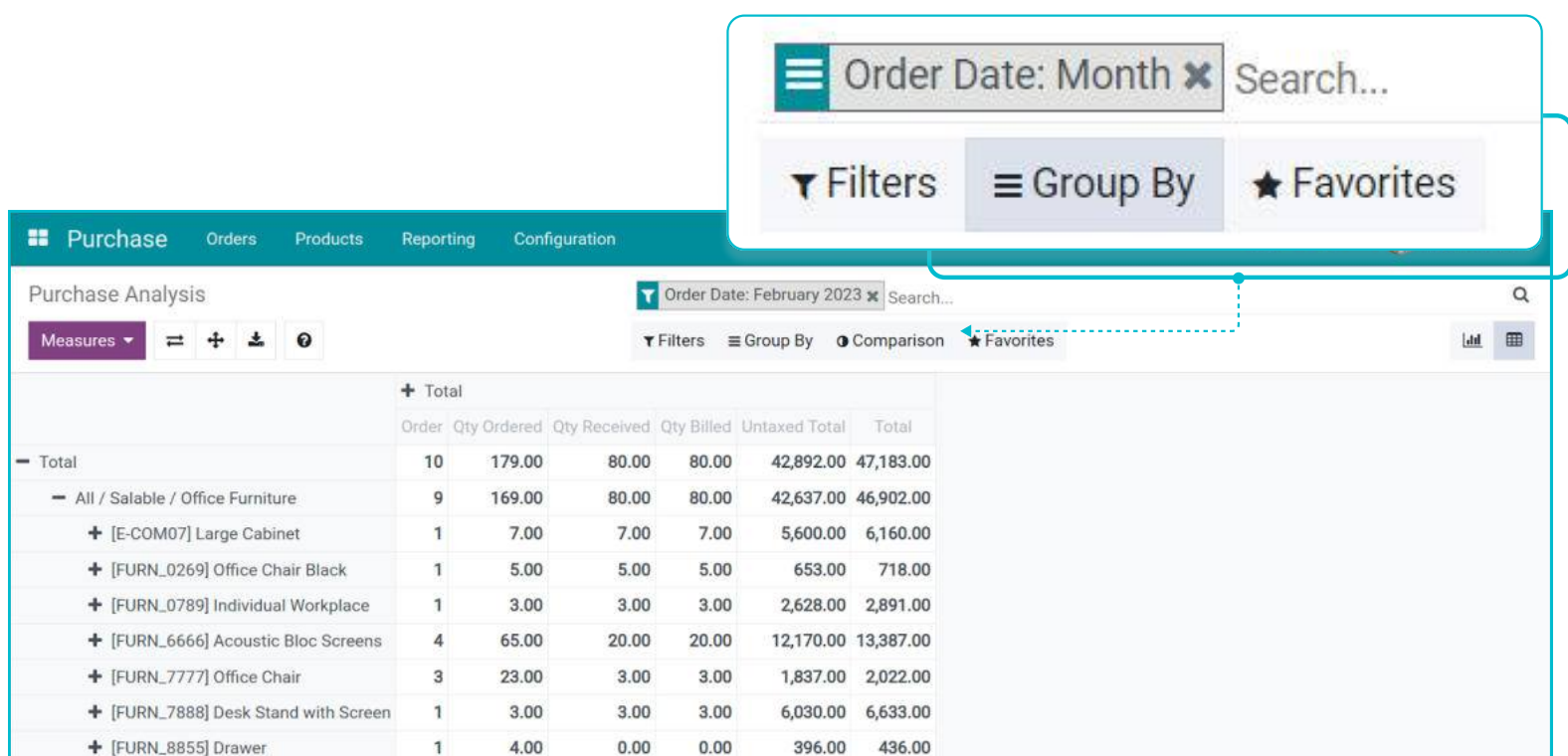
### COMMONLY USED REPORTS

#### Purchase report

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



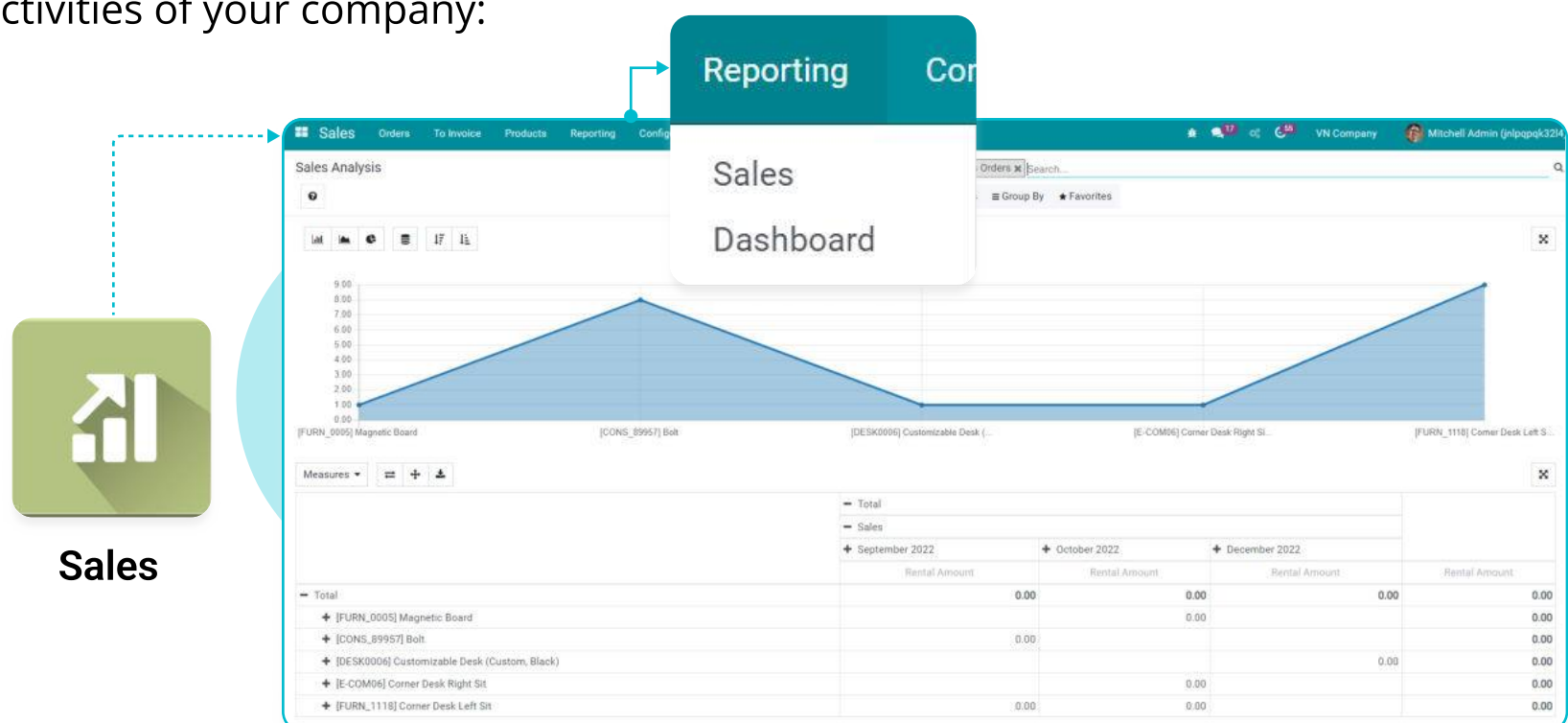
Here, you can view the purchase report as a graph or as a pivot table by clicking the  icon in the right corner of the screen.



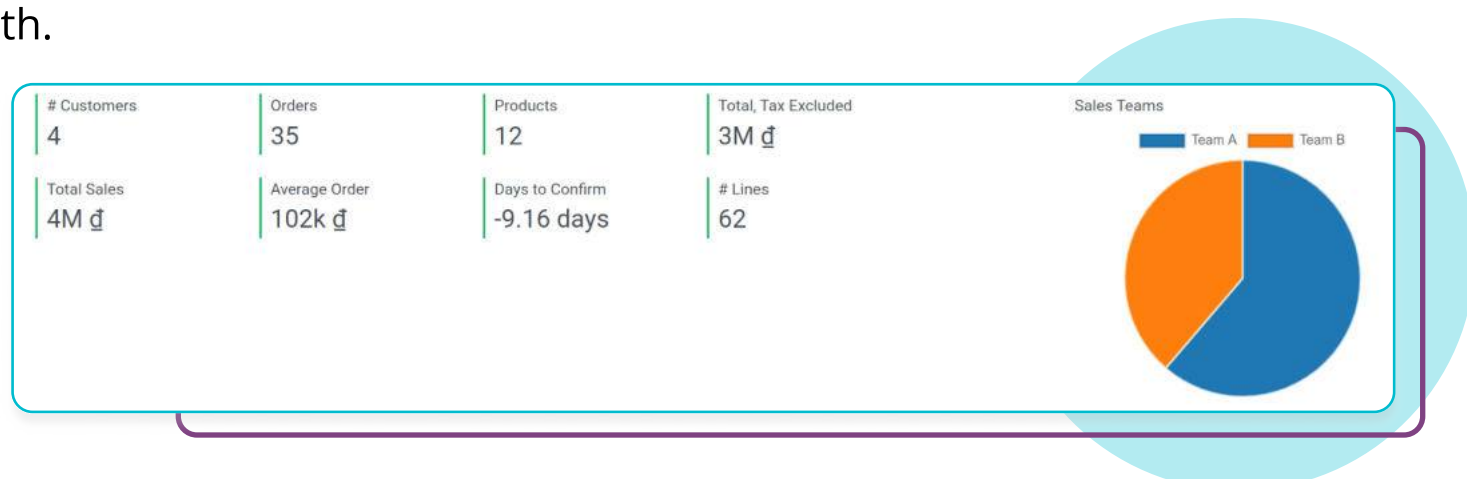
On the pivot report interface, you use **Measure** and filter, group tools to filter out the interest information such as the purchased quantity, the actual received quantity, the amount invoiced, and purchase cost in this month, etc.

## Sales report

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



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

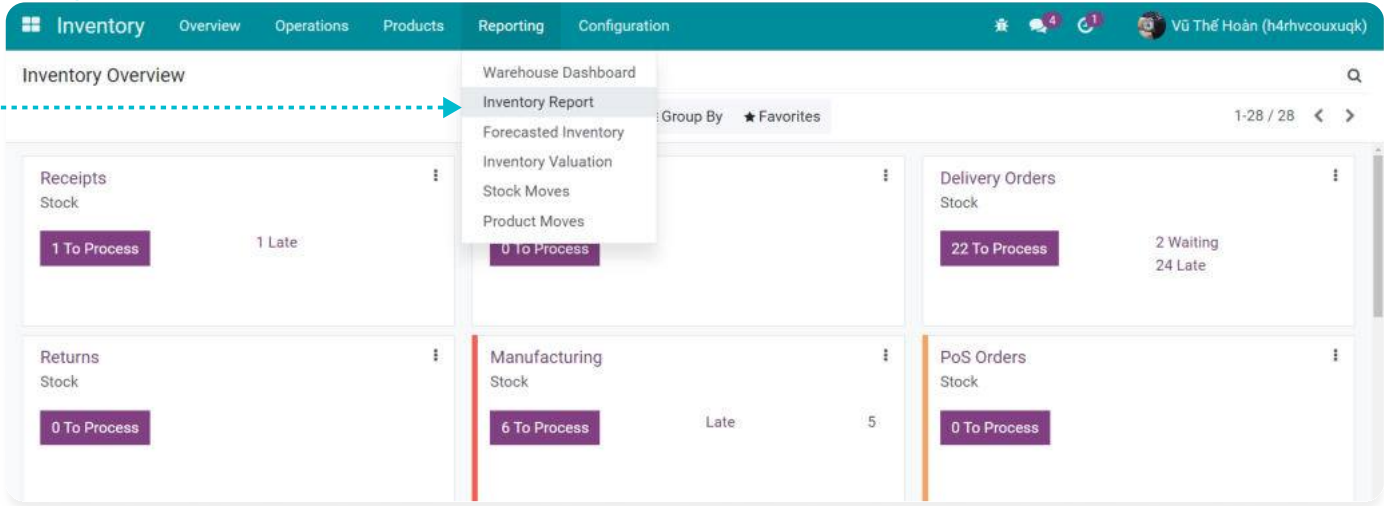


# Inventory report

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



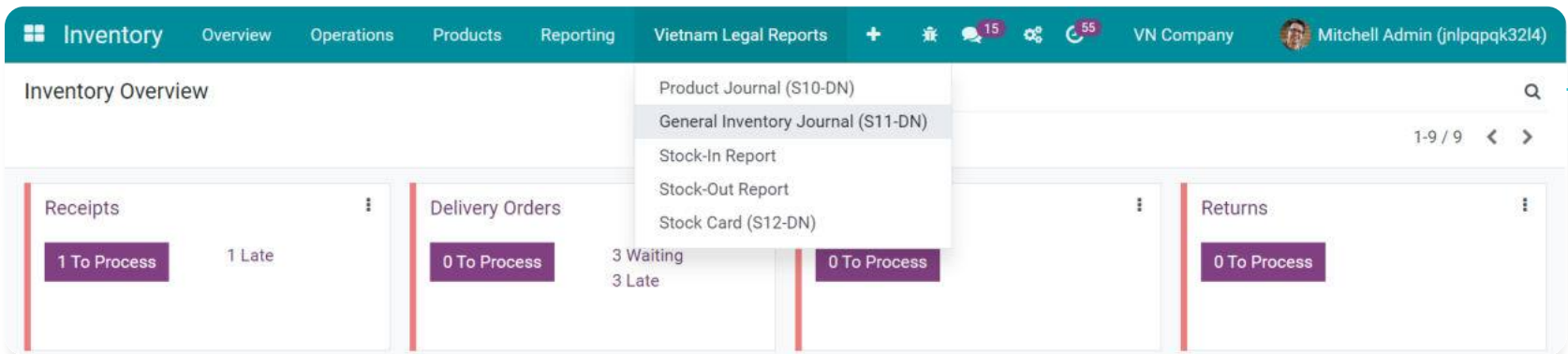
Inventory



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

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

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





**GENERAL INVENTORY JOURNAL**

**Dates**

Date From: 02/01/2023 06:00:00

Date To: 02/20/2023 13:21:08

**Stock**

Product Category: [Dropdown]

**Print** or **Cancel**

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

**GENERAL INVENTORY JOURNAL**

Date From: 02/01/2023 00:00:00 - Date To: 02/20/2023 07:21:08

Warehouse: All

Currency: VND

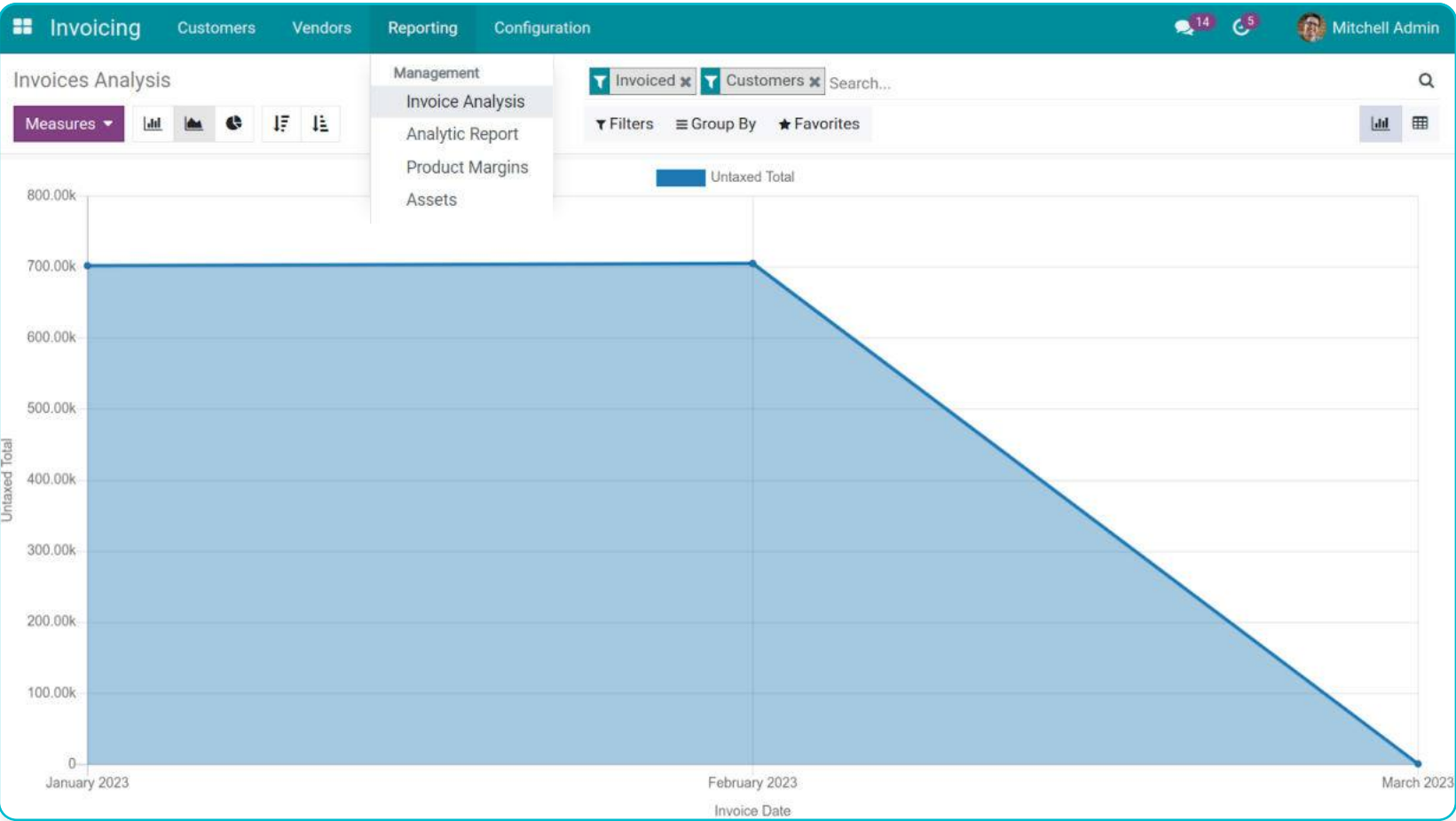
Product Ref.	Product	UoM	Opening Balance		Stock-In		Stock-Out		Ending Balance	
			Quantity	Value	Quantity	Value	Quantity	Value	Quantity	Value
A	B	C	(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)
FURN_7777	[FURN_7777] Office Chair	Units	0.00	0	3.00	165	1.00	55	2.00	110
FURN_8888	[FURN_8888] Office Lamp	Units	0.00	0	30.00	1,050	10.00	350	20.00	700
FURN_7800	[FURN_7800] Desk Combination	Units	-32.00	-9,600	60.00	18,000	0.00	0	28.00	8,400
FURN_0096	[FURN_0096] Customizable Desk (Steel, White)	Units	0.00	0	45.00	22,500	6.00	3,000	39.00	19,500
FURN_0097	[FURN_0097] Customizable Desk (Steel, Black)	Units	0.00	0	50.00	25,000	0.00	0	50.00	25,000
FURN_0098	[FURN_0098] Customizable Desk (Aluminium, White)	Units	0.00	0	55.00	27,500	0.00	0	55.00	27,500
E-COM07	[E-COM07] Large Cabinet	Units	0.00	0	507.00	405,600	150.00	120,000	357.00	285,600

Phone: [Redacted]  
Email: [Redacted]

Page: 1 / 3

## Invoicing report

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



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

The screenshot shows the 'Invoices Analysis' interface with a pivot table. The table has columns for 'Total', 'Not Paid', and 'paid'. The rows are categorized by 'Customer Invoices' and 'Vendor Bills'. A callout box highlights the search bar and filters for 'Invoice Date: 2022'.

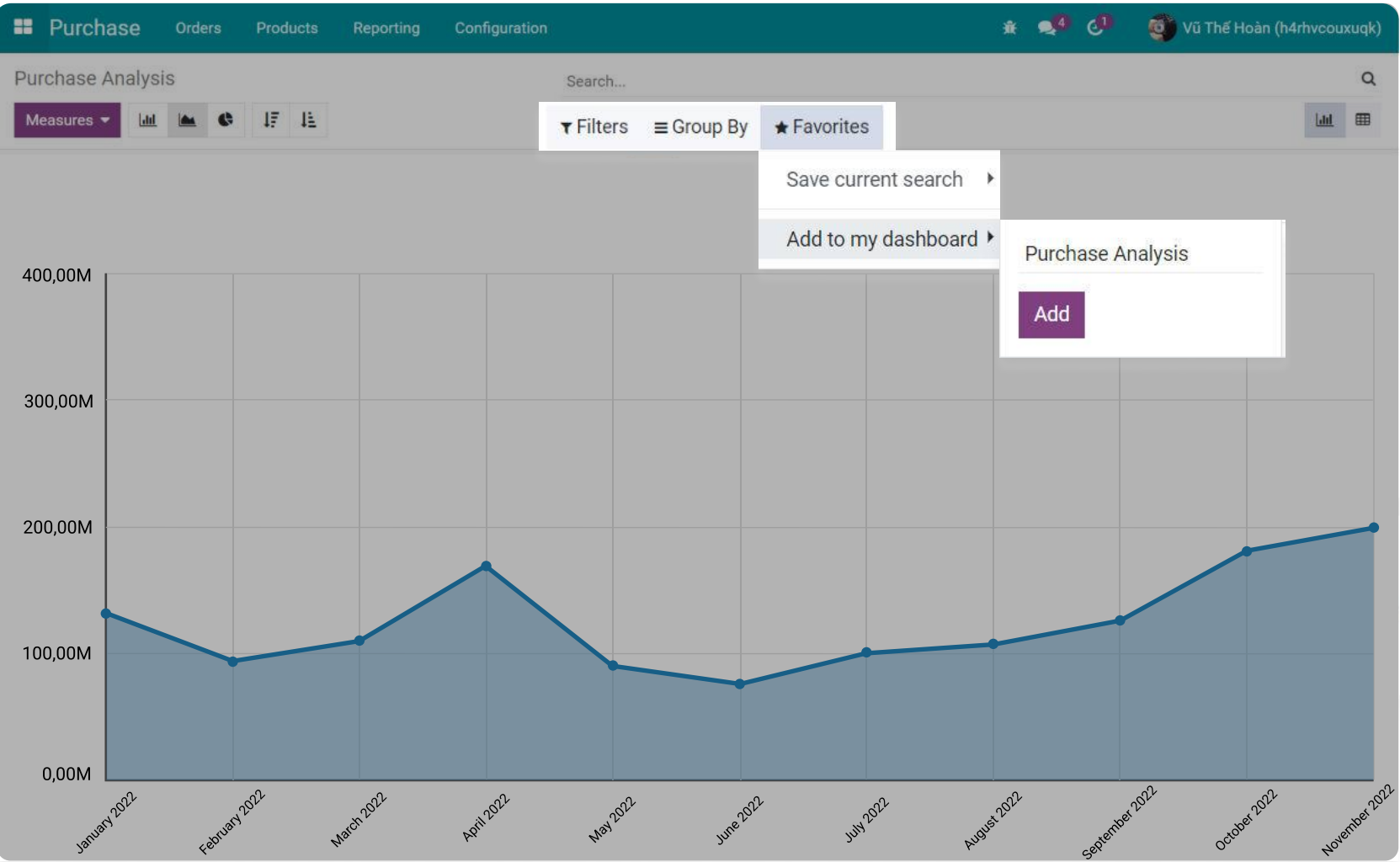
	Total	Not Paid	paid
Untaxed Total	Untaxed Total	Untaxed Total	Untaxed Total
- Total	692,327.00	-18,486.00	673,841.00
- Customer Invoices	702,320.00	3,036.00	705,356.00
+ Gemini Furniture, Soham Palmer		1,706.00	1,706.00
+ Lumber Inc	700,000.00	750.00	700,750.00
+ YourCompany, Joel Willis	2,320.00	580.00	2,900.00
- Vendor Bills	-9,993.00	-21,522.00	-31,515.00
+ Deco Addict	-8,658.00		-8,658.00
+ Ready Mat		-21,522.00	-21,522.00
+ Wood Corner	-1,335.00		-1,335.00

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

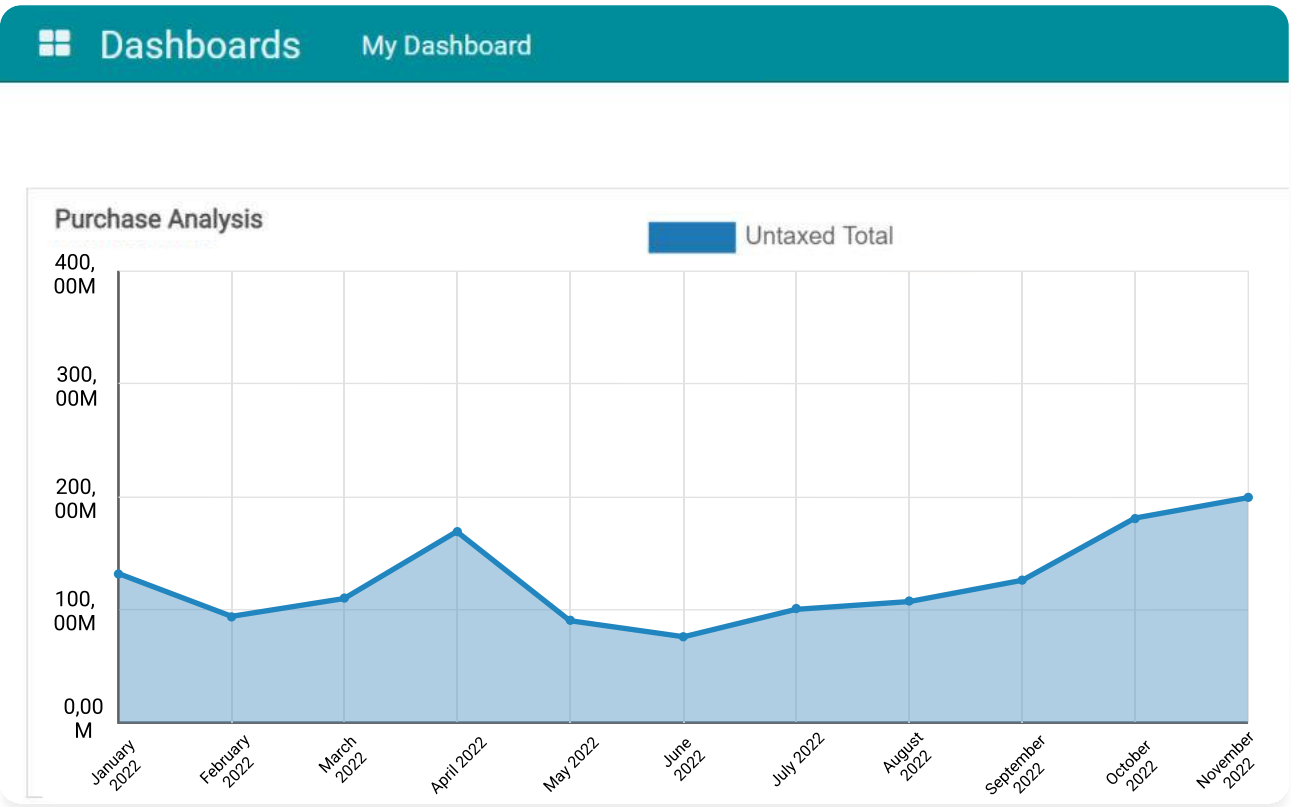
## BUILD YOUR DASHBOARD

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.



### Dashboards







# GUIDELINES CONTACT SUPPORTS

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

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



- ➔ See details at:
- [Forum](#)
  - [User Documentation](#)

A screenshot of the Viindoo Sign Up form. It includes fields for "Your Email", "Your Name" (with an example "e.g. John Doe"), "Your Phone Number", "Password", and "Confirm Password". There is a checkbox for "I have read and agree to the Terms of Use" and a "Sign up" button. Below the button, it says "Already have an account?" and "- or -".

1

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

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

A screenshot of the Viindoo Log In form. It includes fields for "Email" and "Password". There is a "Log in" button. Below the button, it says "Don't have an account?" and "Reset Password". At the bottom, there is a "Log in with Google" button.

2

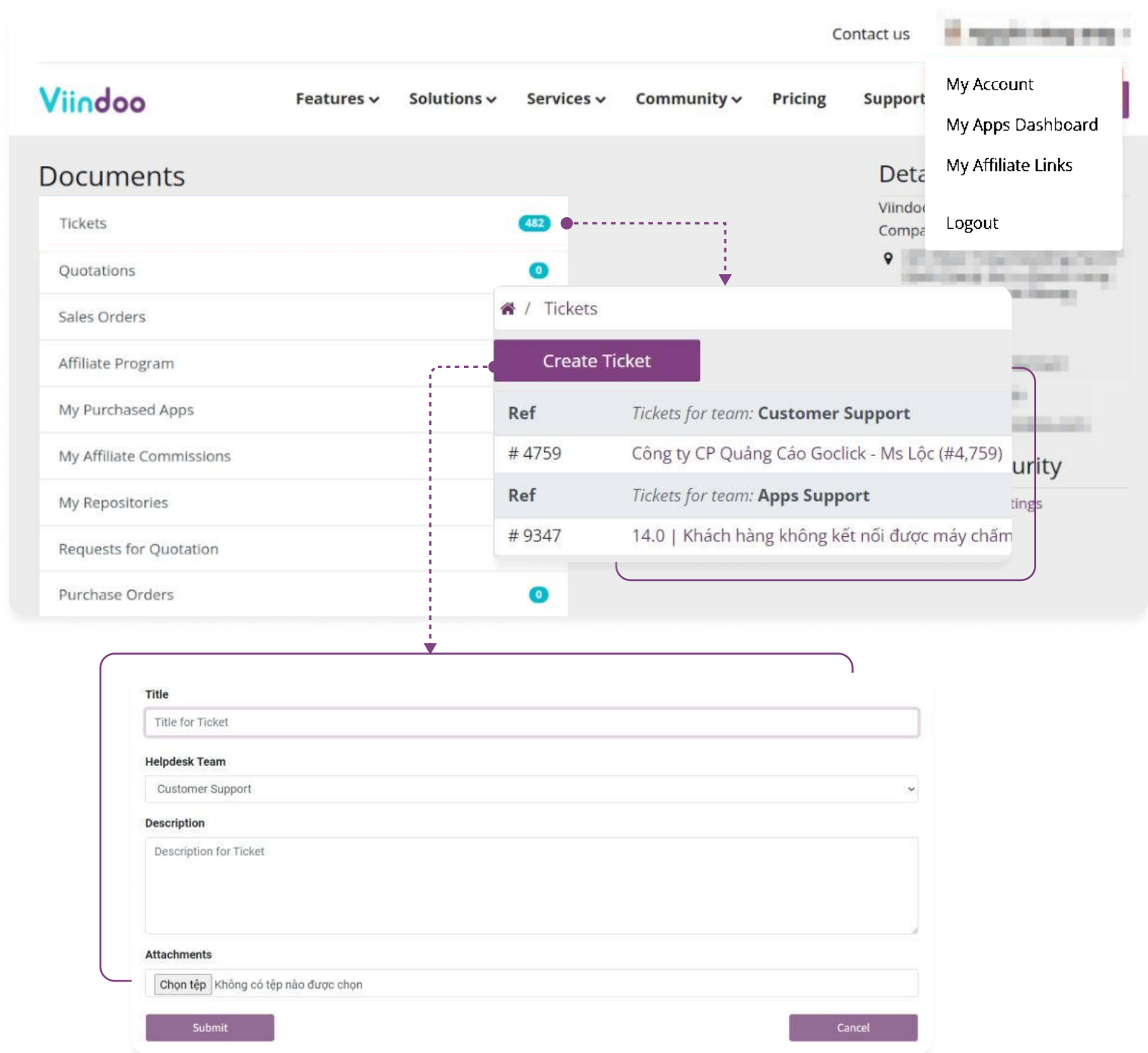
A screenshot of the "Support Ticket" form. It has a header "Support Ticket" and a message: "Your issue may have been resolved on the [Help forum](#) or in the [Viindoo Documentation](#). If you have a new problem, please create a Ticket for Viindoo. Viindoo Support Team will send you the response as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

3



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

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



## Note

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

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



Implementing agency: Viindoo Technology Joint Stock Company

Viindoo version: [V15.0]



## VIINDOO TECHNOLOGY JOINT STOCK COMPANY

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