



EBOOK - QUICK START GUIDE



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

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# INTRODUCTION

Viindoo introduces the Quick Start Guide to help medium-sized businesses (from 50 to 100 employees) define where to start, what to do, and how to implement the Viindoo Enterprise Management Software for their business.

Depending on the type of business and practical needs, each enterprise will have its own specific operations. This document provides guidance on how to perform common business operations for a medium-sized 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.





# BENEFITS OF DIGITAL TRANSFORMATION

The difference in investment capital, product, or technology competitiveness compared to the big players in the market is a common problem in small and medium businesses. Scientific and effective application of the company's resources in all aspects through the digital transformation process is a quick method to help businesses close that gap.

## **SAVE MANAGEMENT COSTS AND IMPROVE WORK EFFICIENCY**

- Digitalizing data and documents and managing them on software will help to reduce document management time and shorten complicated approval processes.
- Automating repetitive tasks and business processes on the same platform to help departments work together and improve work efficiency.
- Using tools to help simplify planning, task planning, reminders, etc. in managing work progress, helping to ensure the completion of tasks on time, and reducing pressure on employees.

## **REAL-TIME AND TRANSPARENT REPORTING DATA**

- Ensure accurate and transparent information flow to shorten information search time conveniently and quickly.
- Data sources from all business activities are collected, analyzed, and reflected automatically, and instantly on administrative reports, saving time in data aggregation and minimizing errors. Besides, this also helps managers to assess and have an accurate and immediate view of the business situation, make timely decisions, and reduce wasted time in operation.

## **IMPROVE CUSTOMER EXPERIENCE**

Not only businesses, but customers also get benefit from the automation and shortening of business processes. Transparent and instantaneous information flow across departments will help planning, and management becomes easier, ensuring the quality of products and services when reaching customers.

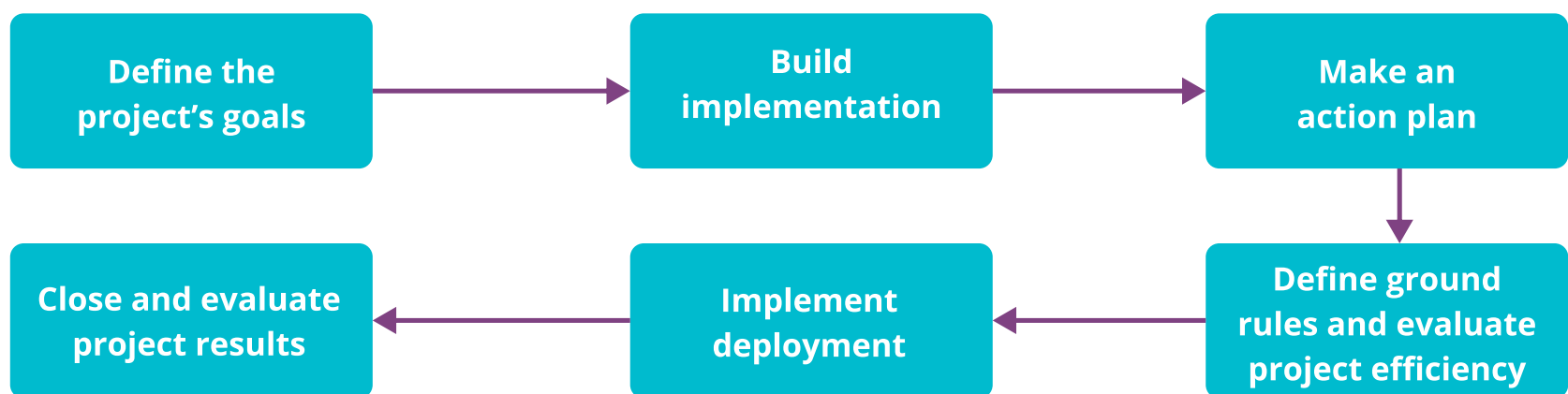
Viindoo software provides management support solutions, helps improve the operational efficiency of the business, ensures smooth coordination between departments, and optimizes labor productivity to achieve business efficiency.





# PREPARATION





## DEFINE THE PROJECT'S GOALS

Before embarking on the implementation of Viindoo software, managers need to clearly define the goals of applying the software in business, thereby having a basis for measuring and evaluating the success of the transformation process.

Businesses should ask and answer questions such as:

- *Why do businesses need to deploy a software system?*
- *What are the difficulties and inadequacies in the current management and operation of the business?*
- *What is the desired outcome when the software implementation is completed?*

Businesses should apply the SMART method to write clear and realistic goals to achieve the highest efficiency, according to which:

- **Specific (S-Specific):** A clear and detailed description of the goal to be achieved that helps identify and evaluate the feasibility when executing the software implementation project.
- **M-Measurable:** Make sure the project goals are measurable with specific metrics, such as percentage change or quantity, etc. This step helps the manager to clearly define how the goal will be achieved and easily that will get a whole picture of project.
- **A-Assignable:** The project goal should be something the business desire to achieve. This is connected with defining the project scope. So the project scope needs to be clearly defined, achievable within the time frame, and given the resources the business has available for this project, so should the project objectives.
- **Relevance (R-Relevant):** Make sure this project objective is relevant and integral to the overall direction of the business.
- **Time limit (T-Time-Bound):** Estimated time for the project to be implemented, and specific timelines that the business wants to achieve.

## BUILD AN IMPLEMENTATION COMMITTEE

An implementation team should have from 02 to 05 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 directly to the Board of Directors. The team leader makes the implementation plan, monitors the implementation progress, and communicates the desires, goals, and implementation roadmap to all team members.
- *Assistant:* Should be a person who can summarize and record information to record the minutes of internal project meetings.
- *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

### IMPLEMENTATION PLAN

At the beginning of the project, the preliminary project implementation plan is a guideline, helping the Project Manager to ensure that the work is on track. The implementation plan includes the necessary details of the project such as objectives, tasks, scope of work to be performed, deadlines, assignees, etc. This helps stakeholders identify responsibilities right from the start, as well as understand the software implementation roadmap to proactively allocate resources appropriately.

IMPLEMENTATION PLAN

PROJECT

PROJECT MANAGER

IMPLEMENTATION DURATION

FROM

10

12-Dec-2022

Weeks

TO

25-Feb-2023

No.

CONTENT

EXPECTED OUTPUT

RESPONSIBLE

STATUS

MILESTONES

WEEK

1

2

3

4

5

6

7

1

Project Preparation (2 weeks)

12/12 - 17/12

19/12 - 24/12

26/12 - 31/12

03/01 - 07/01

09/01 - 14/01

16/01 - 28/01

30/01 - 04/02

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

2.5

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

Viindoo

Powering Your Business Growth

### DEFINE THE SCOPE OF WORK

To have a realistic software implementation plan, defining the software deployment scope is a prerequisite. As a business, you need to ask yourselves 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?*

SCOPES OF WORK							Viindoo	
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								



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

Based on the above list, 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.

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 the work and allocate resources accordingly.

## **DETERMINE THE PLAN TO USE THE BUDGET**

To be proactive in implementing Viindoo software and can make important decisions fastest, businesses need to clearly define the estimated budget for the project. This budget will be used for expenses incurred during the implementation process, including monthly costs of using Viindoo SaaS services, costs of personnel involved, costs in case of need for consulting support from Viindoo, the cost of customizing specific features (if needed), and the estimated cost incurred.

## **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:

- *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 \(Page 44\)](#) in the Viindoo software to monitor and optimize the implementation progress.

## DEFINE HOW TO EVALUATE PROJECT EFFICIENCY

Team members 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, 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.

## IDENTIFY TOOLS TO EVALUATE AND MEASURE THE EFFECTIVENESS OF THE PROJECT

Based on the list of difficulties and problems of each department, the job position is determined from the time of software implementation, and the managers can evaluate how much Viindoo software meets the requirements.

In addition, businesses can use the ROI (Return On Investment) index to measure the performance/effectiveness of investment costs to use Viindoo:

$$ROI = \frac{\text{Gain from Investment} - \text{Cost of Investment}}{\text{Cost of Investment}} * 100\%$$

For example, an enterprise spends VND 990,000 for 5 Viindoo SaaS accounts monthly. After 6 months, the revenue of the enterprise increased by about 50,000,000 VND compared to 6 months before. In this case:

$$ROI = \frac{50.000.000 - 990.000 * 6}{990.000 * 6} * 100\%$$

IMPLEMENT GENERAL MANAGEMENT TO ENSURE PROJECT SUCCESS

The project leader (main responsible person) needs to implement the procedures for managing project members, ensuring that each member can add data and practice his/her operations on the system.

Issues log

Create a file to record all difficulties and problems in the process of the members in order to not only keep track of each project member's work progress but also serves as a log to send a support request to Viindoo, following the instructions in section VI.

ISSUE LOGS						
Project			Deployment time			
Project Manager			Timeline from			
STT No.	Processes	Contents	Expects	Priority	Responsibility	Status
1				Urgent		New
2				Medium		In-progress
3				Short		Done
4				Yes it's good		Cancelled
5						
6						
7						
8						
9						
10						
11						
12						
13						
14						
15						

Weekly meetings

Conduct weekly internal discussions or meetings to find out the best implementation options.

- Timely capture and track the progress of work.
- Listen, discuss with members who cannot use the software, find the cause and fix it.
- Motivate members who contribute to the project such as completing work early or on schedule to motivate your team members, and increase their productivity and work efficiency.

At the beginning of the implementation, when all your employees are not familiar with the new system, the workload will increase due to having to import data to the new system while carrying out the daily tasks on the old system. During this time, the Project Manager and Project Assistant need to coordinate the team's workload reasonably. It's a stressful stage and team members definitely will have mixed opinions and discussions. Therefore, the Project Manager should be determined and deliver the purpose and spirit of the company to its employees, motivating and providing them with step-by-step instructions.

## **IMPLEMENT THE SOFTWARE FOLLOWING THE ACTION PLAN**

After defining the project goals and making an implementation plan, the business will enter the most important and difficult stage, which is implementing the Viindoo software for their daily operation. Based on the proposed plan, the Project Manager/Project Assistant starts to assign tasks to each team member. Employees need to improve their sense of responsibility and pro-active spirit in solving assigned tasks and ensure information transparency, and timely update progress with the Project Manager at the same time.

## **CLOSE AND EVALUATE PROJECT RESULTS**

At the end of the transition to Viindoo, the Project Manager and the Project Assistant need to evaluate the project completion based on the volume of completed work, in comparison with the initial requirements. In addition, businesses can track, calculate and compare ROI before and after applying Viindoo software.

After finishing the implementation project, businesses still need to monitor and record problems as the foundation for later stages of implementation and expansion. This is also a time to encourage spirit and recognize the contributions of project team members as well as learn from the experience for the next stages.





# GETTING STARTED WITH VIINDOO



## SYSTEM INSTALLATION

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

Choose the appropriate service package and usage cycle that meets your needs. Viindoo currently supports 03 service packages that users can choose from.

- **One App** package: Click **Start Now** to create the system.
- **Standard** or **Luxury** package: Click **Buy Now** to create the official system, or choose **Free Trial** to create a trial system and experience it for 15 days.

The screenshot displays the Viindoo pricing page. At the top, there's a navigation bar with links: Liên hệ, Đăng ký, Đăng nhập, and VIE. Below this, the Viindoo logo is on the left, and a row of links (Phần mềm, Giải pháp, Biểu phí, Hỗ trợ) is on the right, followed by a purple button labeled 'Dùng thử'. The main section has a teal background with the heading 'The right plan for your needs' and 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.' Below this, there are two tabs: 'Monthly' (selected) and 'Annually'. Three pricing cards are shown: 'One App' (FREE, 01 application only, Unlimited users, START NOW button), 'Standard' (178,200 đ/user/month, Unlimited applications, 03 hours of free training, BUY NOW and FREE TRIAL buttons), and 'Luxury' (226,800 đ/user/month, Unlimited applications, Flexible customization with Customizer, Multiple companies, Upload of Custom applications, 05 hours of free training, BUY NOW and FREE TRIAL buttons). The Standard package is highlighted with a 'Recommended' tag.

If you choose to use the **Free Trial** service package, select the applications according to your requirements or utilize Viindoo's recommendations of applications that are suitable for each industry such as E-commerce, Retail, Manufacturing, and Service Trade.

When you select an industry, the system will automatically mark the corresponding applications for that industry. You can add or remove applications to create the most suitable system for your business.

Click **Try Now** to start a 15-day free trial experience.

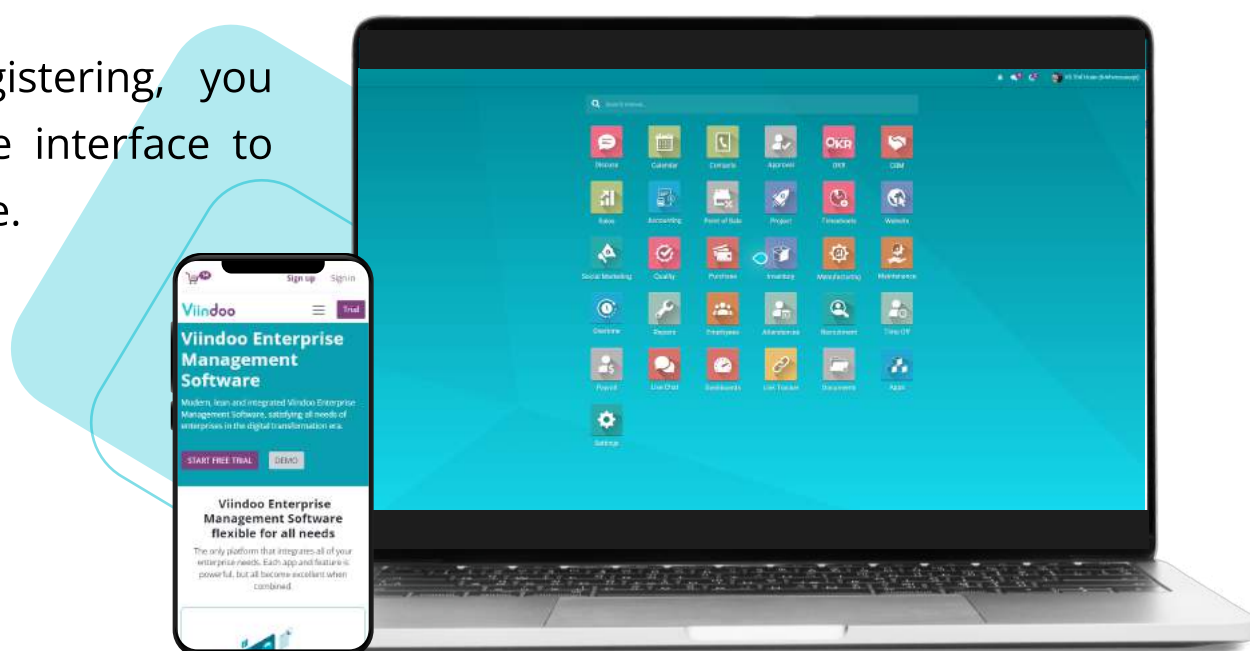
- If you already have a Viindoo account and have logged into the system, you will be directed to the interface for creating a trial system.

- If you do not have a Viindoo account, the system will redirect you to the page for creating a new account. Here, you will need to fill in the required information such as name, type of business, number of employees, phone number, email, password, etc. Then, click **Submit** to quickly create an account and start setting up a trial system.

➔ See details at:

- [Getting Started with Subscription.](#)

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



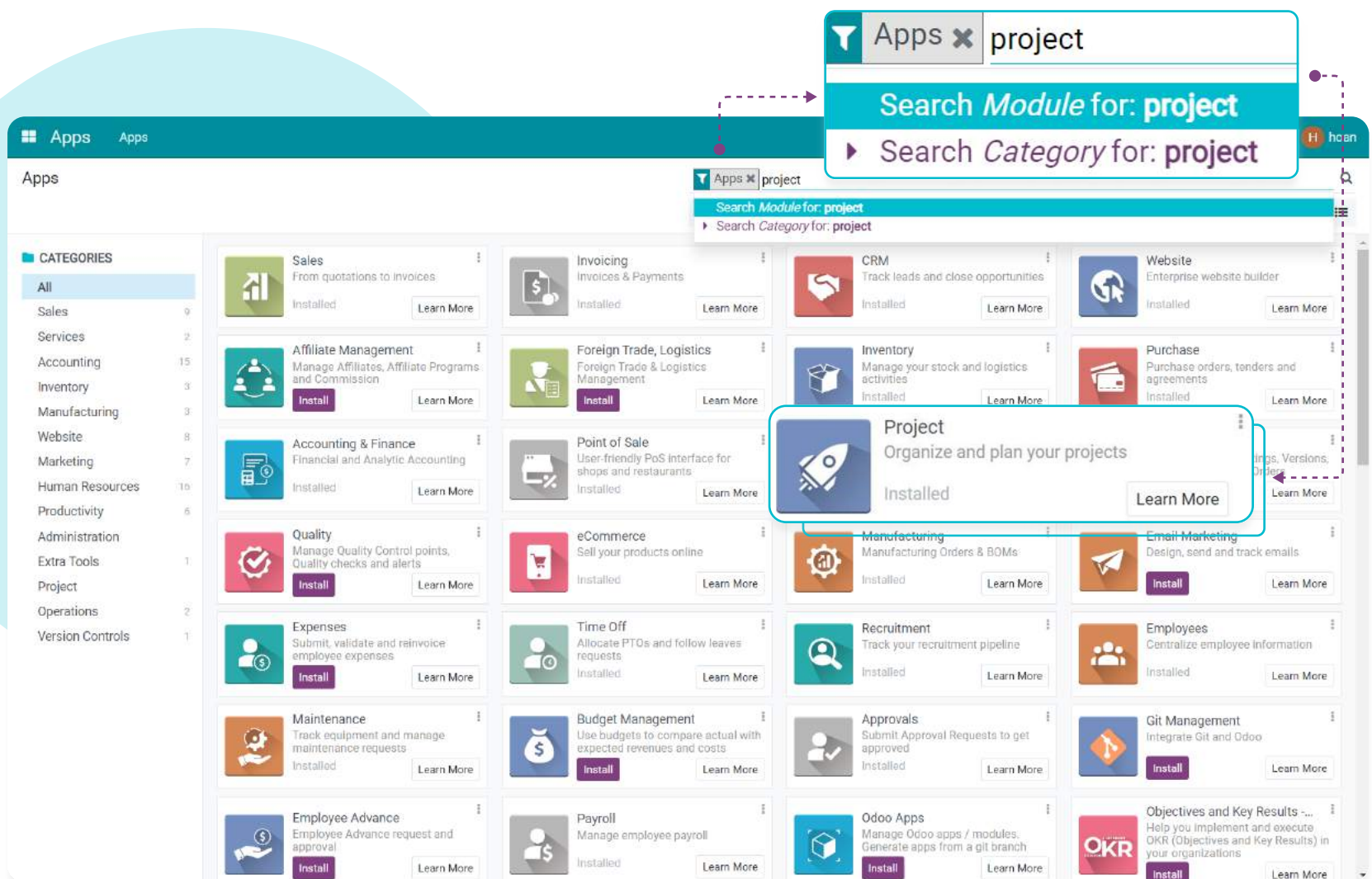
### ⚠ Note

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 YOUR BUSINESS OPERATIONS

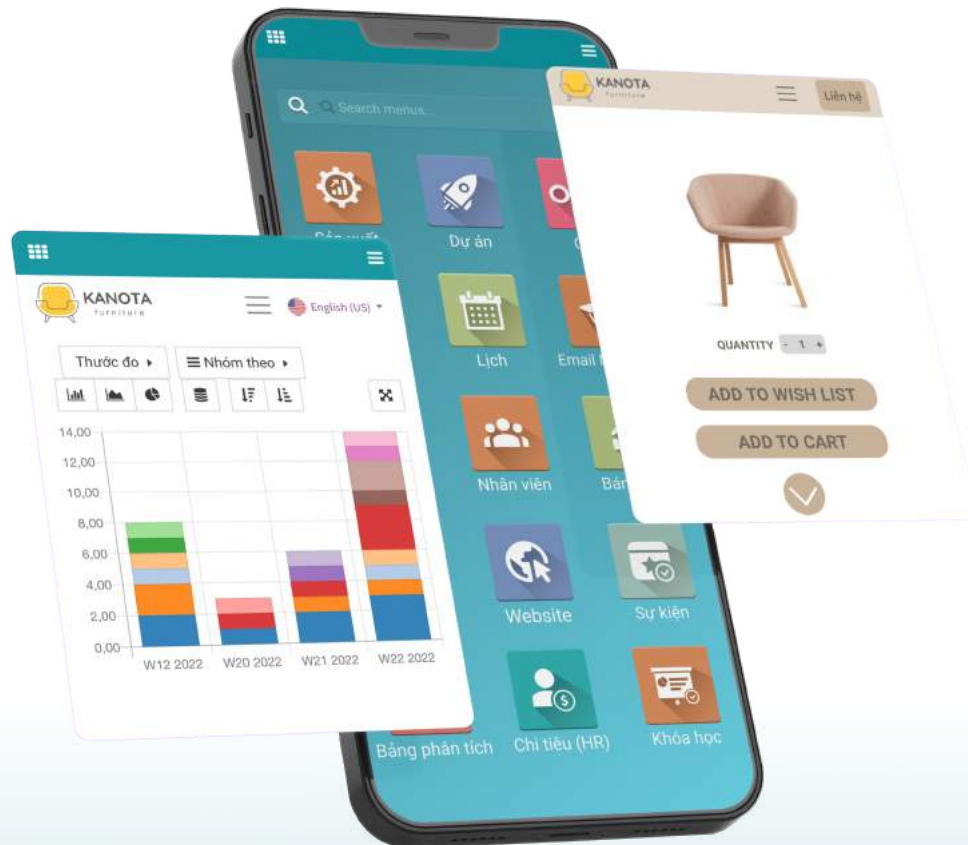
Depending on the needs and purposes of your business, access the **Apps** and use keywords to search for apps to install.



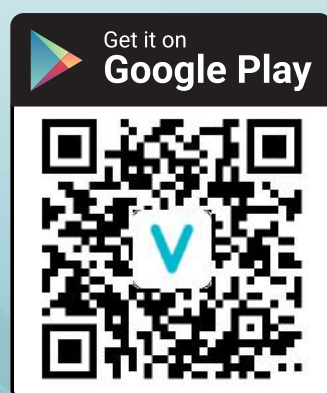


## USE VIINDOO ON MOBILE DEVICES

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.

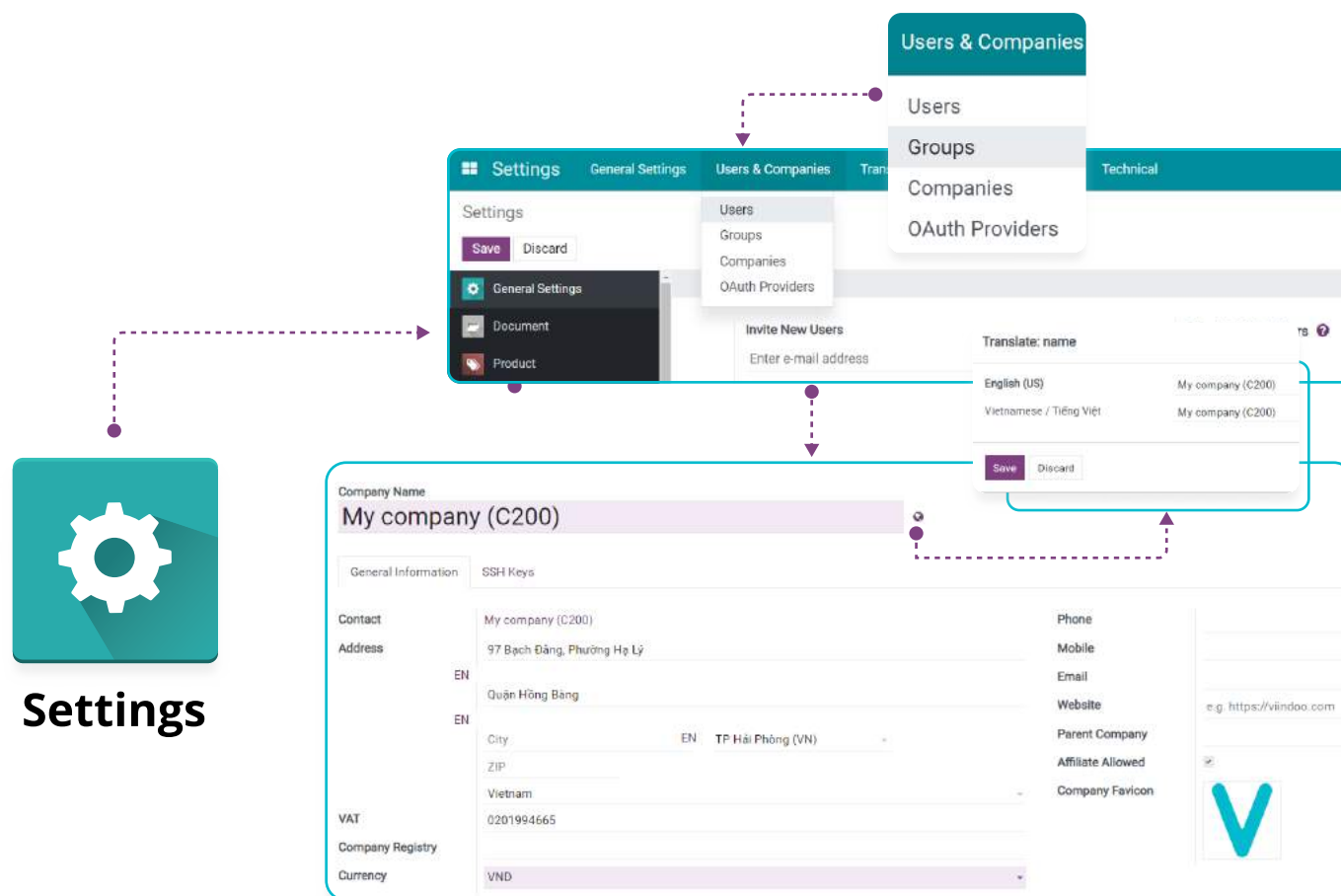


## SYSTEM MANAGEMENT

### 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:

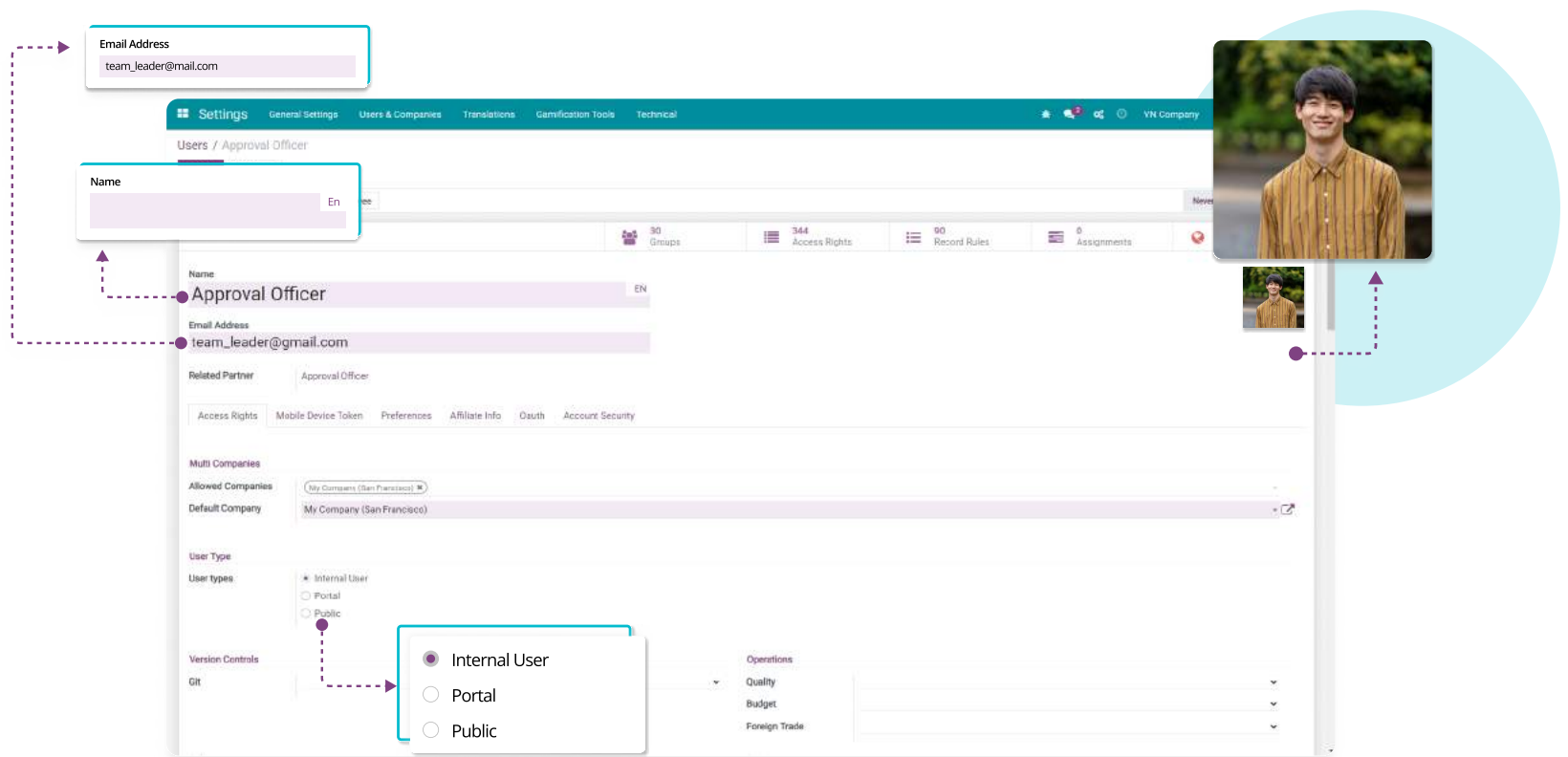


To display your company information in another language, you can click on the icon 🌐 or **EN** to enter the translated text for each information field.

### 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.

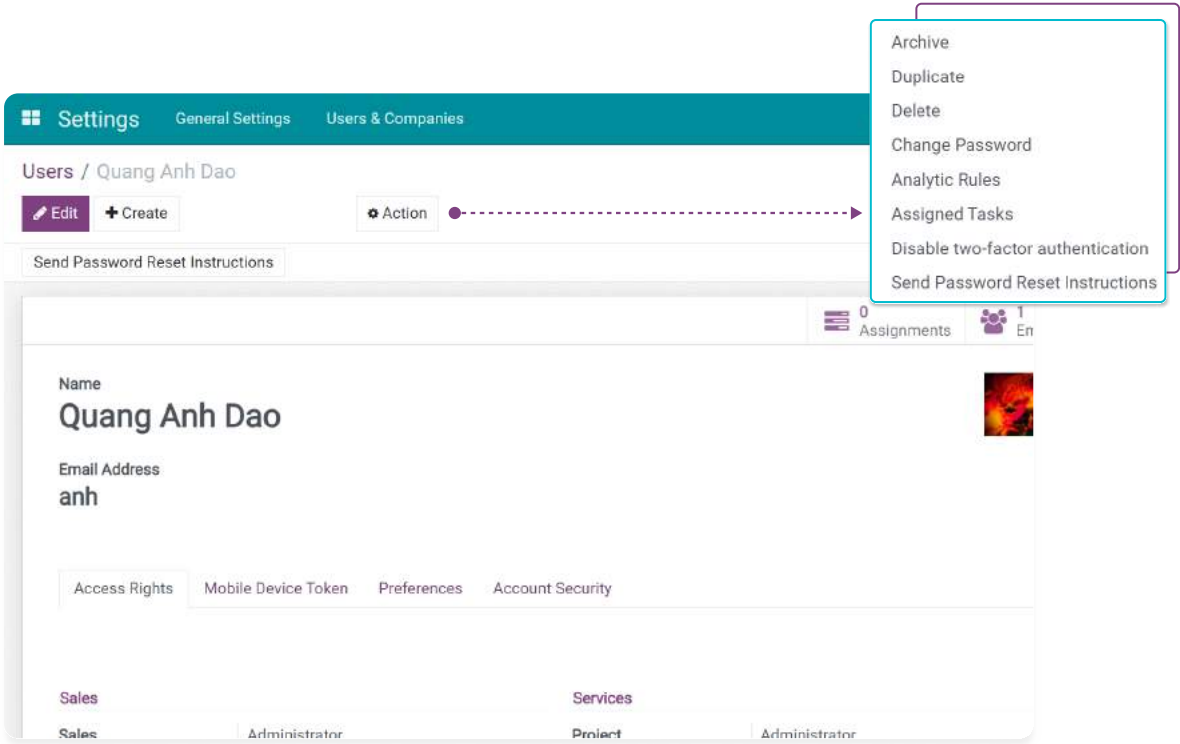


In case your business is organized by departments, specialized employees and needs to manage each employee's task, you can refer to Viindoo's access rights suggestions:

<div> <div>Partition</div> <div>Job position</div> </div>	Document Management		Purchase Management		Sales - POS Management		Inventory Management		Accounting	
	Officer	Admin	User	Admin	User: All Document	Admin	User	Admin	Billing	Admin
Director	<input type="radio"/>	<input checked="" type="checkbox"/>	<input type="radio"/>	<input checked="" type="checkbox"/>	<input type="radio"/>	<input checked="" type="checkbox"/>	<input type="radio"/>	<input checked="" type="checkbox"/>	<input type="radio"/>	<input checked="" type="checkbox"/>
Document Management Officer	<input type="radio"/>	<input checked="" type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Purchase Management	<input type="radio"/>	<input checked="" type="checkbox"/>	<input type="radio"/>	<input checked="" type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Purchase Officer	<input checked="" type="checkbox"/>	<input type="radio"/>	<input checked="" type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sales Management	<input type="radio"/>	<input checked="" type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sales Person / Walter / Cashler	<input checked="" type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Project Manager	<input checked="" type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Warehouse Manager	<input checked="" type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>	<input type="radio"/>	<input type="radio"/>
Warehouse Staff	<input checked="" type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Production Foreman	<input type="radio"/>	<input checked="" type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Manufacturing Staff	<input checked="" type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Chief Financial Officer	<input type="radio"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="radio"/>	<input checked="" type="checkbox"/>	<input type="radio"/>	<input checked="" type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>
Accountant	<input checked="" type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>	<input type="radio"/>
HR Manager	<input type="radio"/>	<input checked="" type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
HR Staff	<input checked="" type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Website Developer	<input checked="" type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

<div> <div>Partition</div> <div>Job position</div> </div>	Project Management		Manufacturing		Human Resources		Website		Administration	
	User	Admin	User	Admin	Officer	Admin	Restricted Editor	Editor and Designer	Access Rights	Settings
Director	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Document Management Officer	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Purchase Management	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Purchase Officer	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sales Management	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sales Person / Walter / Cashler	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Project Manager	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Warehouse Manager	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Warehouse Staff	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Production Foreman	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Manufacturing Staff	<input checked="" type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Chief Financial Officer	<input checked="" type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Chief Accountant	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Accountant	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
HR Manager	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
HR Staff	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Website Developer	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

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 \(Page 28\)](#) for security reasons.

## LOG IN AND CONFIGURE PERSONAL ACCOUNT

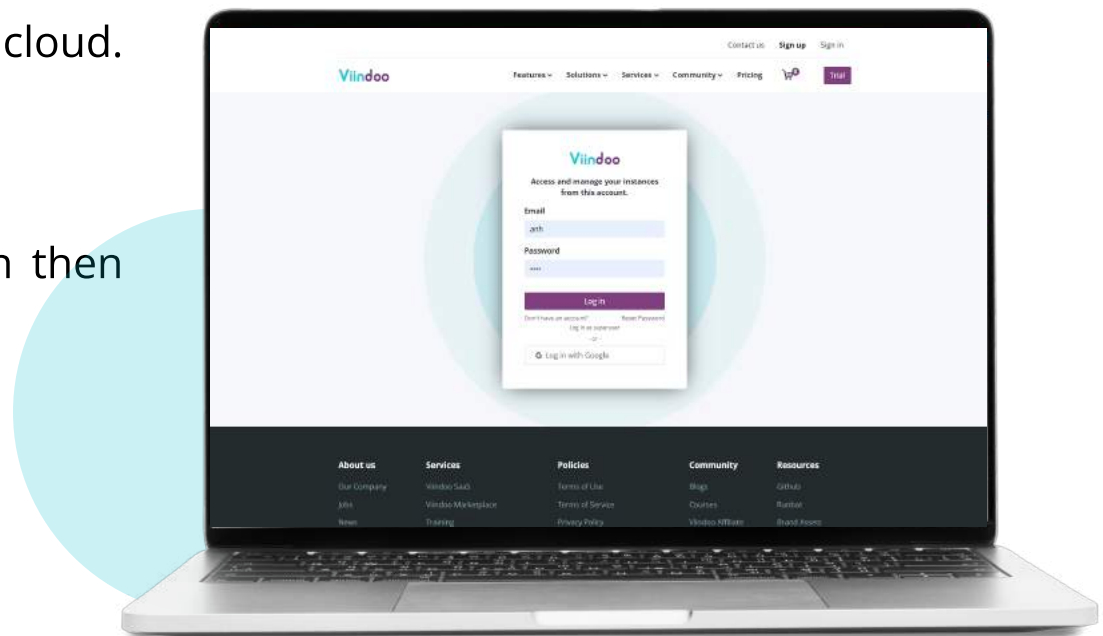
### LOG IN TO VIINDOO SOFTWARE

#### 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: [tencongty.viindoo.cloud](https://tencongty.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 \(Page 19\)](#) step. E.g: [tencongty.viindoo.cloud](https://tencongty.viindoo.cloud).
- *Your mail address:* Enter the email address of the user account that was created.
- *Password:* Enter the corresponding password.



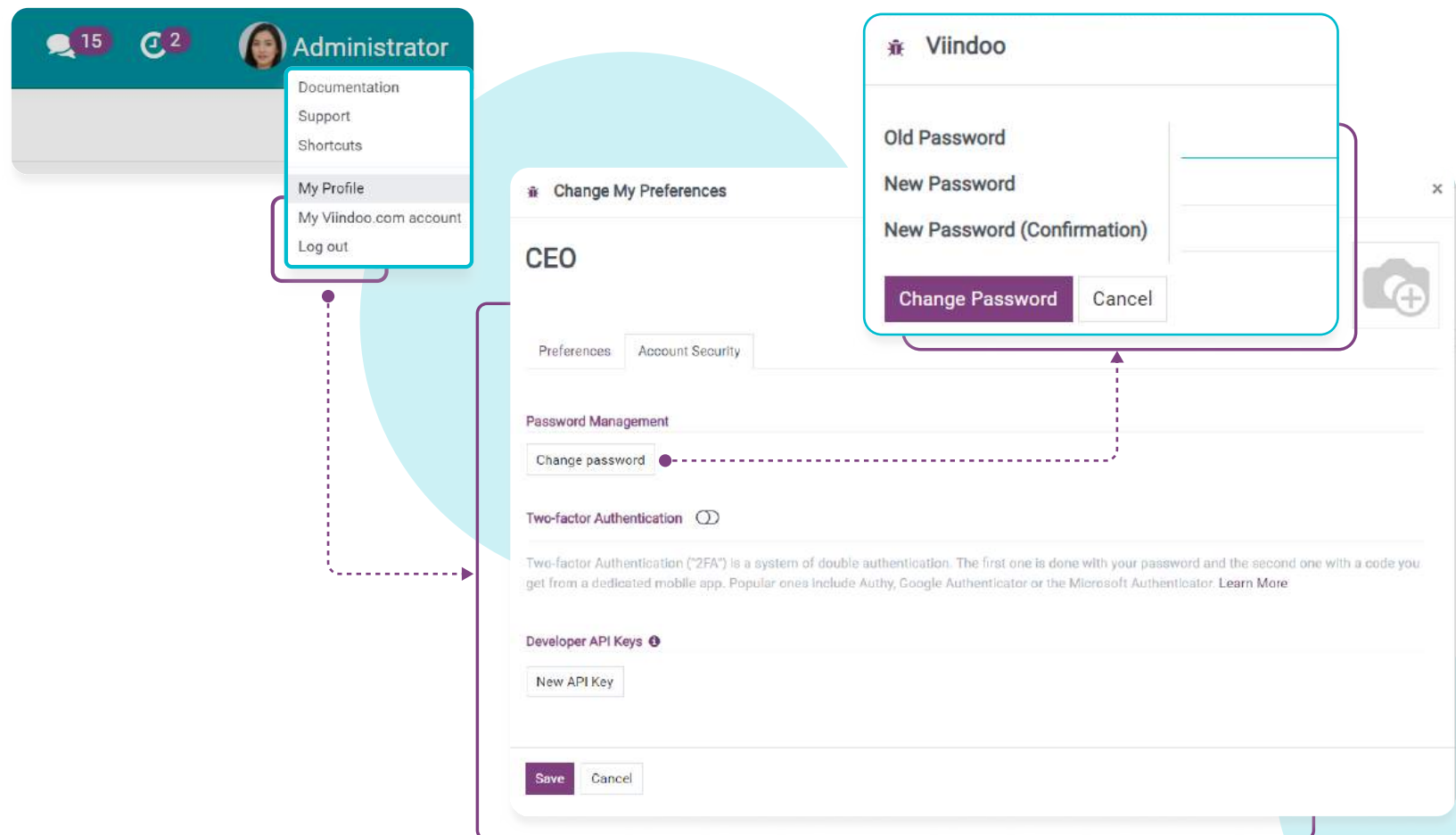
After successful login, you will be redirected to the Mobile view. Here, you can receive notifications, reply to emails, or do the same thing as in a web browser.



## CHANGE PASSWORD

### Change new password

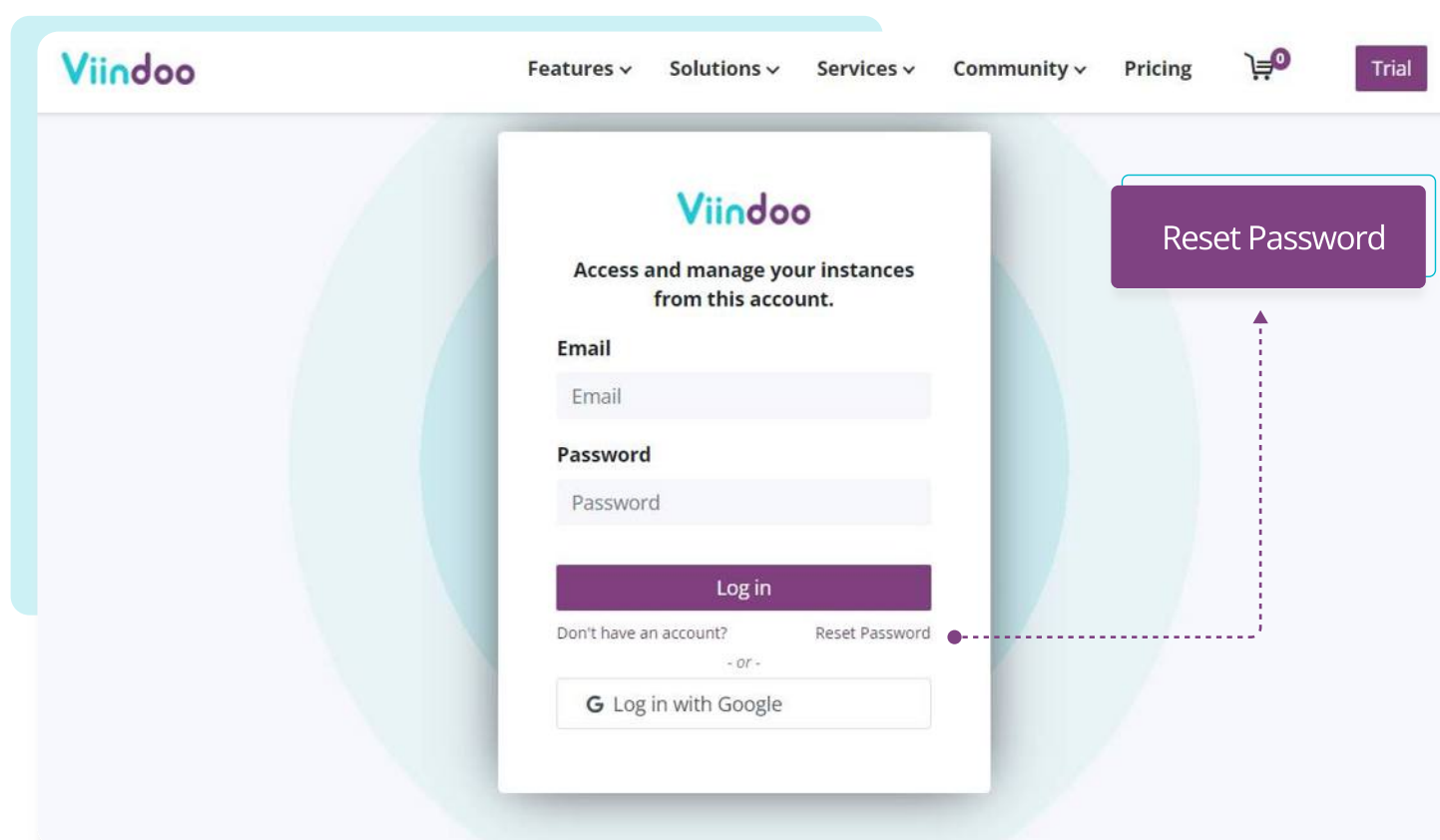
To change your password, navigate to **My Profile**, select **Account Security** ▸ **Change Password**:



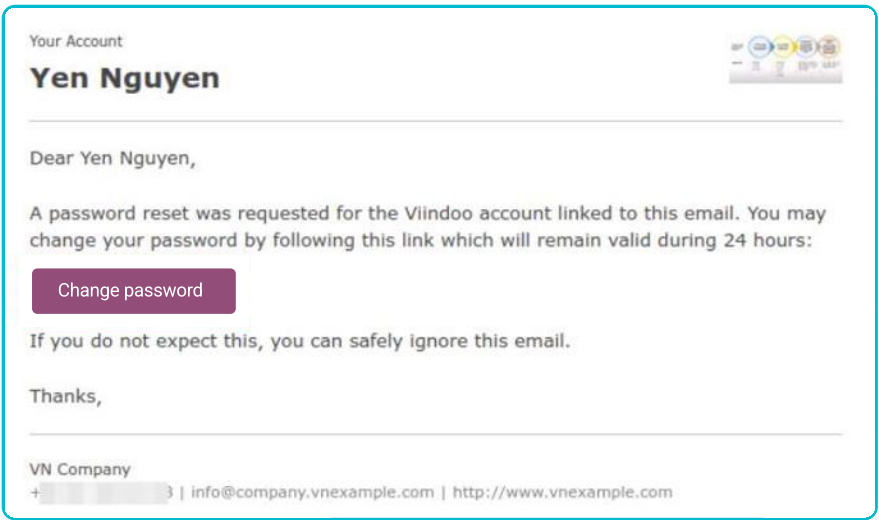
Enter the new password and press **Change Password** to complete.

### Reset password

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



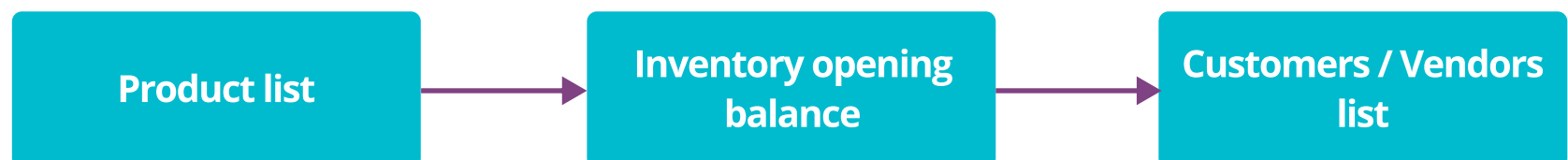
The system will send you an email with instructions to reset your password. Access your email account, press **Change password**, select a new one and **Confirm**.

A web form for password reset on the Viindoo platform. The form is titled "Your Email" and contains four input fields: "Your Email" (with a masked address), "Your Name" (filled with "Yen Nguyen"), "Password", and "Confirm Password". A purple "Confirm" button is at the bottom. The form is part of a larger web page with a navigation bar at the top containing links like Home, Shop, Events, Courses, Services, Pricing, Company, Docs, and a shopping cart icon. The page also has "Sign in", "English (US)", and "Contact Us" options.

## PREPARE INITIAL DATA

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

Initial data to be prepared including:



## PRODUCTS LIST

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



### Create a product category

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

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

The screenshot shows the 'Product Categories' configuration form in the Viindoo software. The form is titled 'Product Categories / All / Saleable' and includes 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 two dropdown menus: 'Costing Method' set to 'Specific Identification' and 'Inventory Valuation' set to 'Automated'. The form also shows a '0 Products' indicator in the top right corner.



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

## ❗ Note

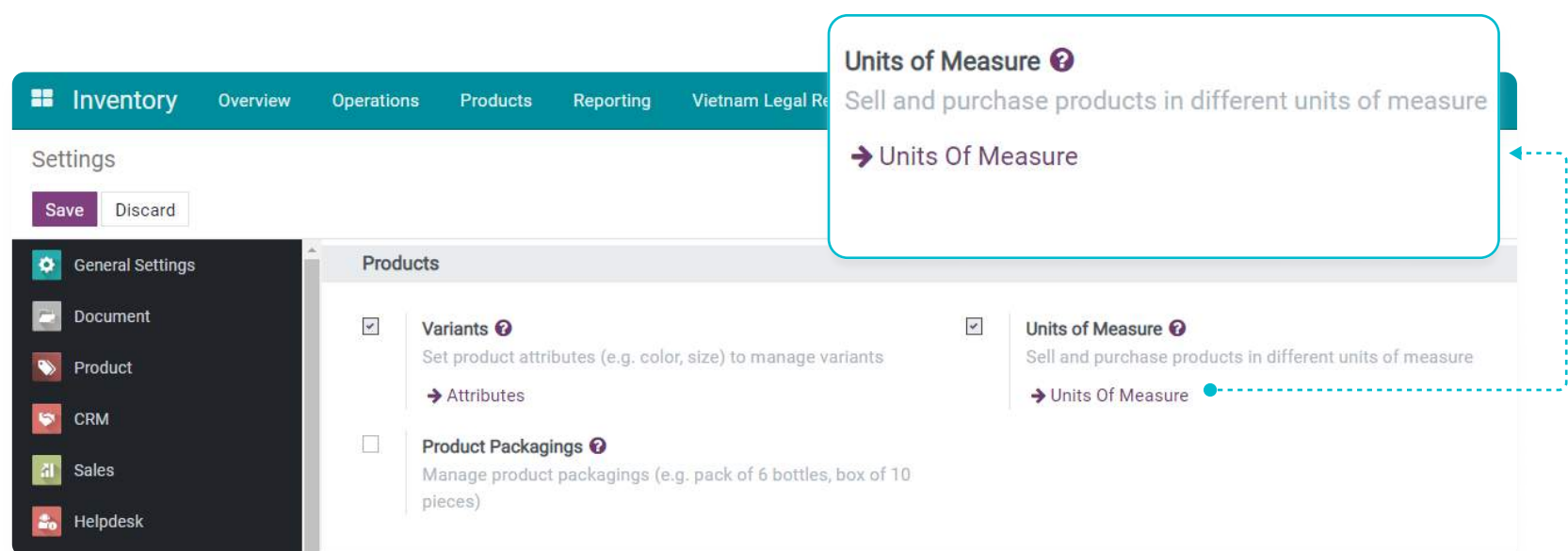
To know the meaning and usage of each information field on Viindoo

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

## Create a Unit of Measure (UoM)

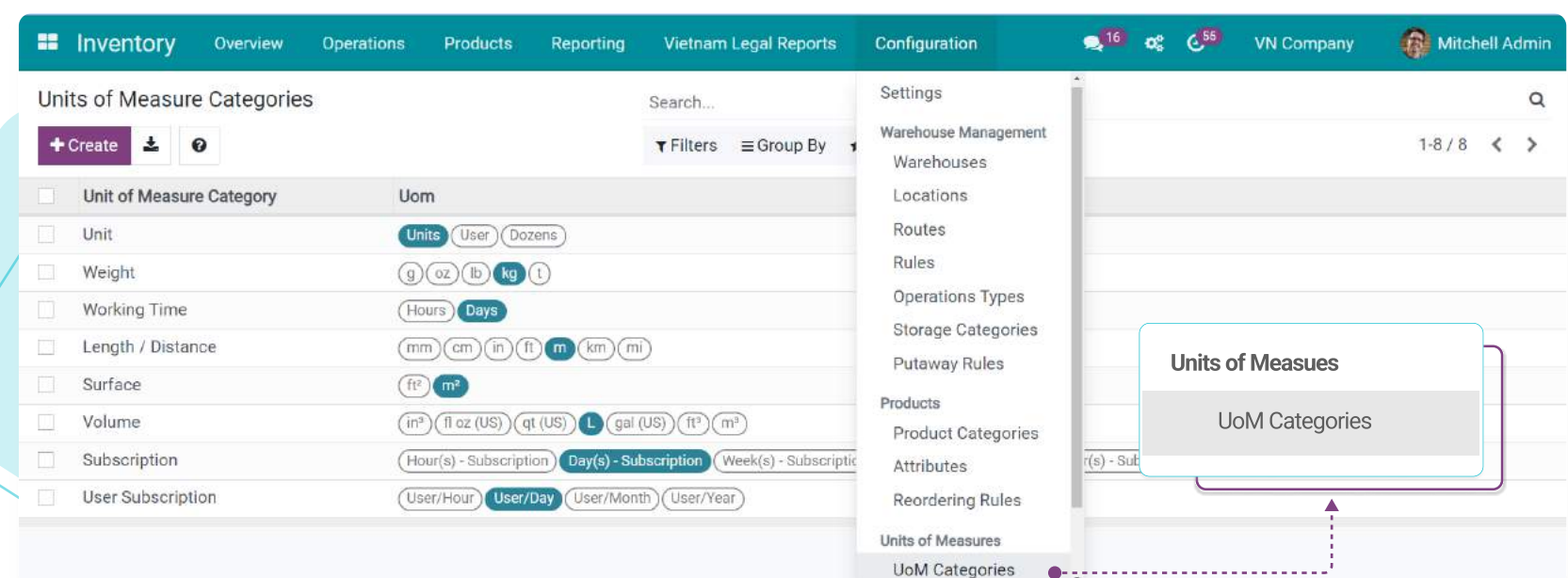
### Enable Units of Measure feature

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



### Create new Units of Measure (UoM)

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



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

sure

1.00000

0.01000

Unit of Measure Category

Unit

EN

Name Concatenation

Units of Measure

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

Add a line

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

Create a new product

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

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

Inventory Overview Open

Products

Create

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

Storable products are physical items for which you manage the inventory level.

Sales Price

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

Customer Taxes

Value Added Tax (VAT) 10%

Cost

800,000.00 g

Product Category

All / Saleable

Internal Reference

FURN\_0269

Barcode

On hand: 0.00 Units

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

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

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

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

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

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

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

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

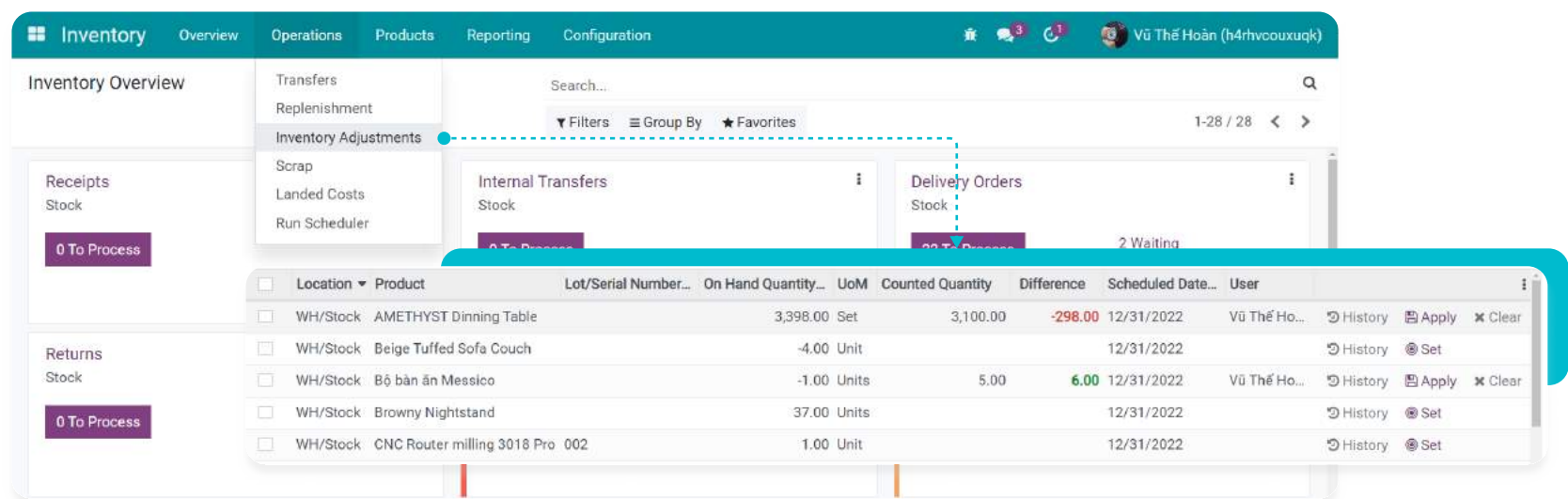
Customizable Desk 5 Variants Price: 750.00 g On hand: 0.00 Units

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

## INVENTORY OPENING BALANCE

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

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



Add the following information:

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

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

## CUSTOMERS/VENDORS LIST

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



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

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

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

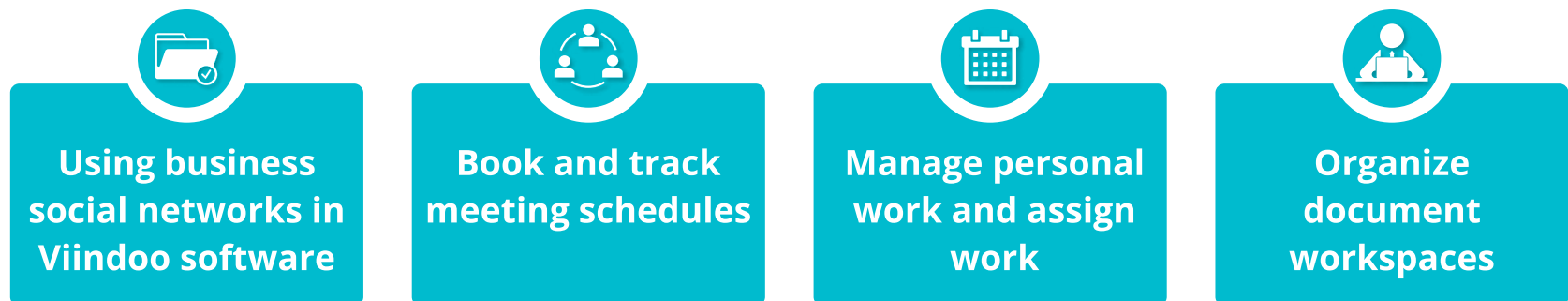




# PERFORMING DAILY OPERATIONS IN VIINDOO



## E-OFFICE MANAGEMENT



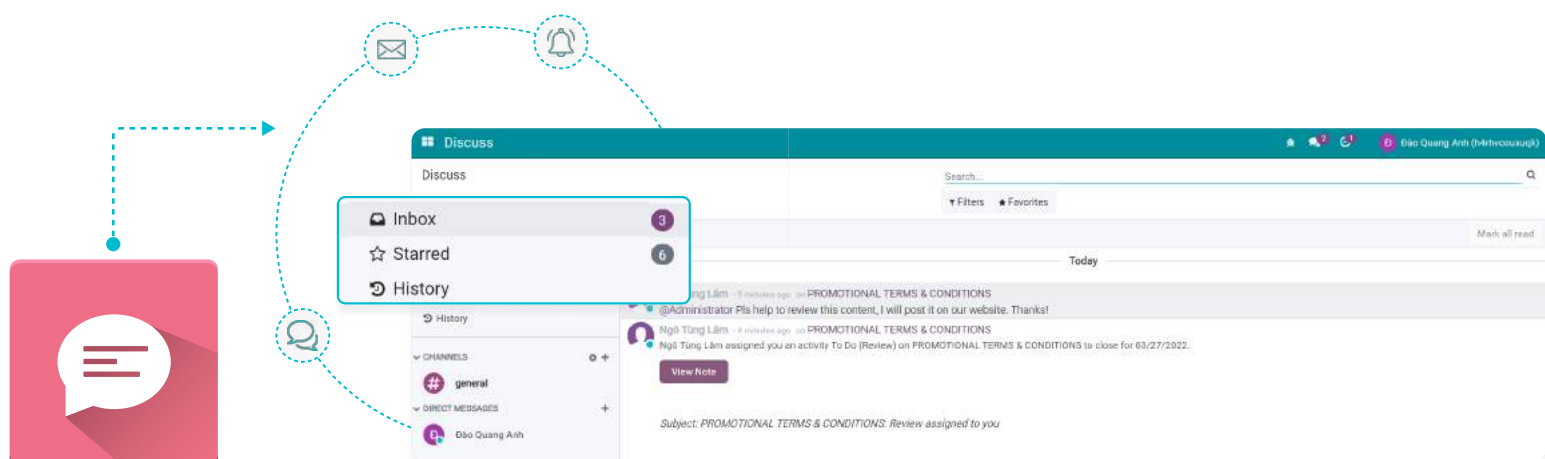
## USING BUSINESS SOCIAL NETWORKS IN VIINDOO SOFTWARE



### Receiving and processing information

Viindoo Social network is a mini social network where not only internal discussions happen but also is a tool supporting the communication between your business and other partners outside of your company.

Let's get started with the **Discuss** app:



### Discuss

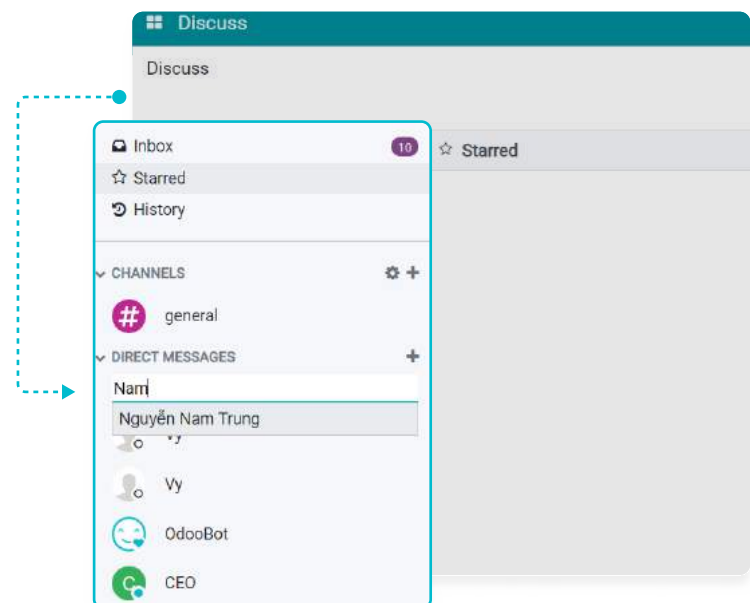
- **Inbox:** Display all incoming messages. For effective task management, you should categorize these messages using the *Get things done* principle. Resolve messages that wouldn't take longer than 2 minutes, otherwise, mark them to solve later.
- **Starred:** Display messages that are marked with a 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 exchanging information on the interfaces of applications on Viindoo software.

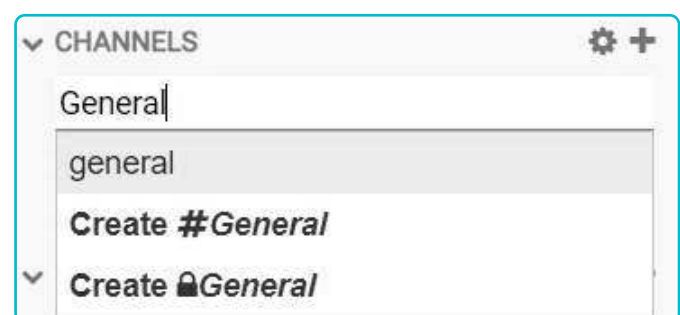
### Direct Messages

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

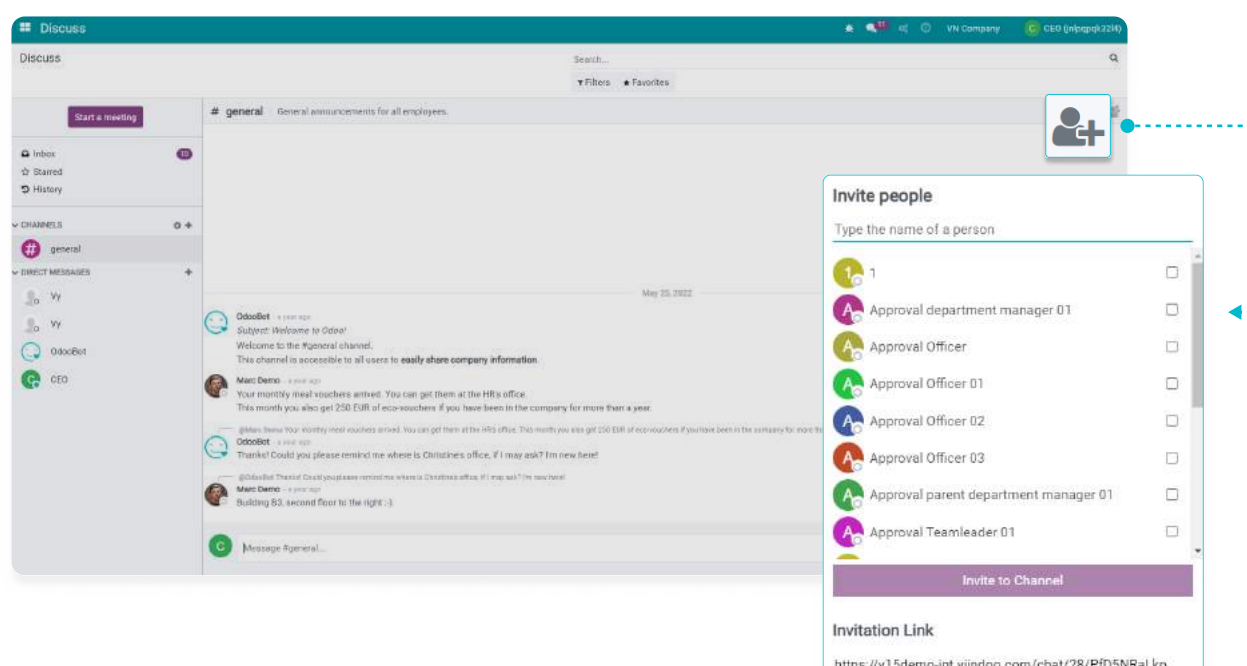
A channel is where your employees discuss a certain topic. In addition, you can also use channels to communicate with your customers or anyone outside of your business.



There are 2 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.

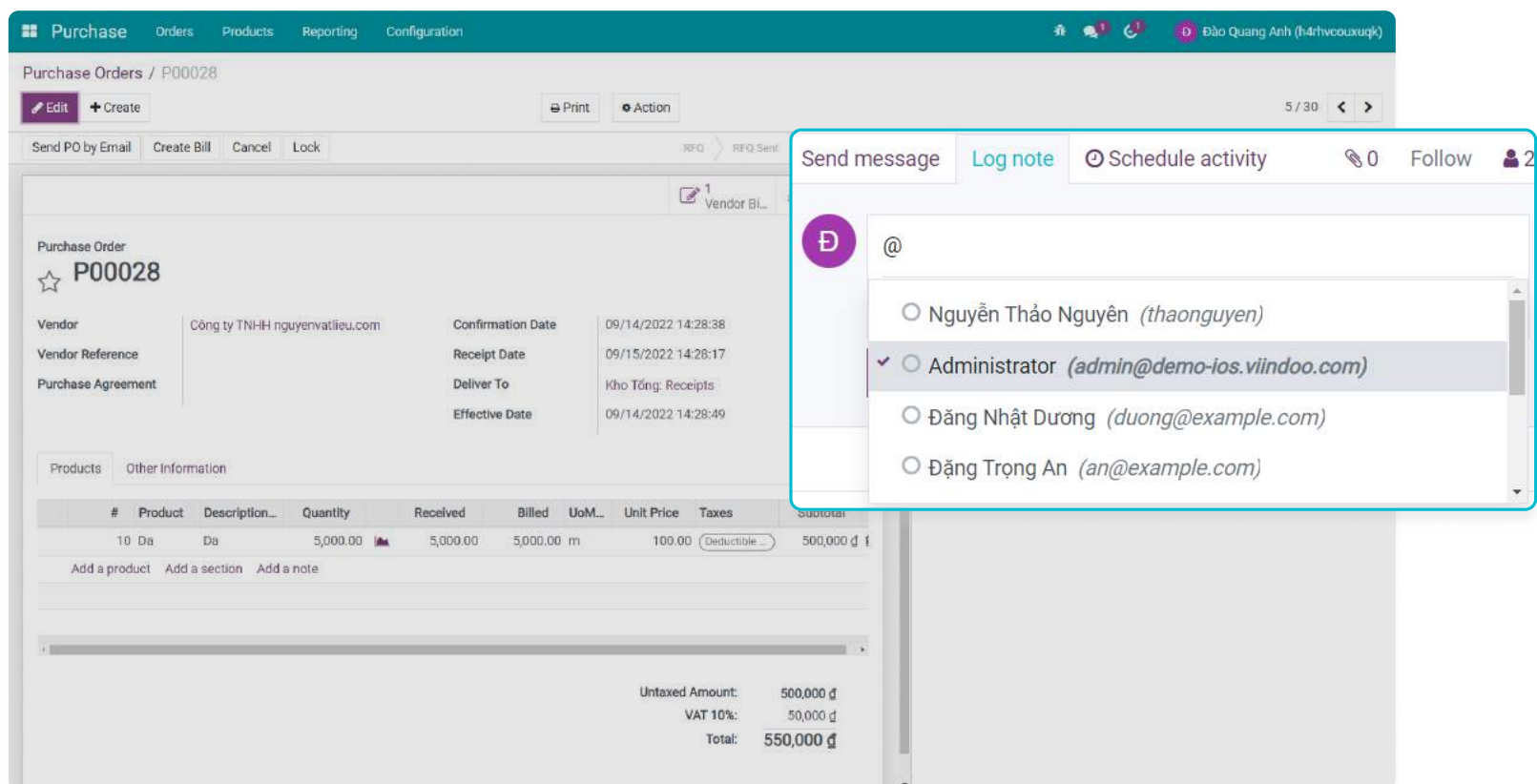




## Exchange information in the Viindoo software

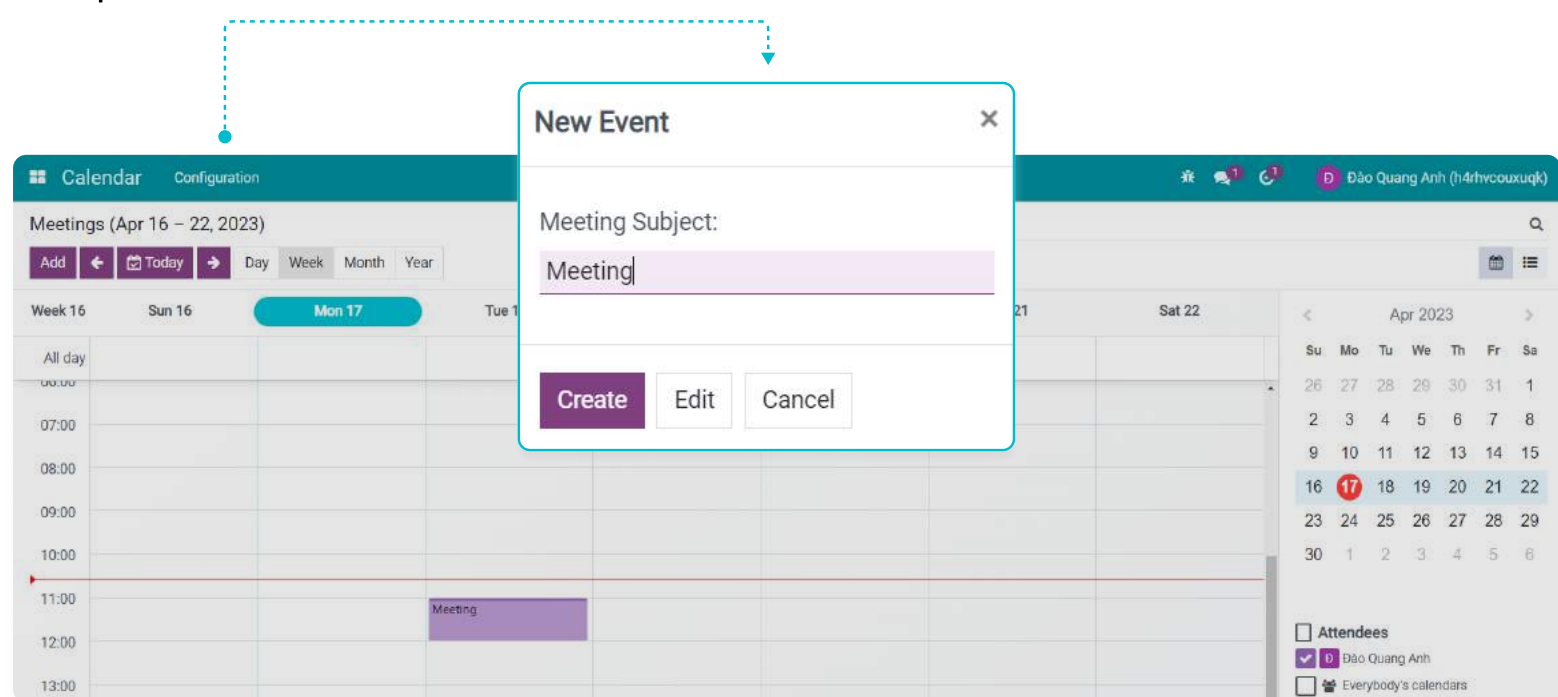
You can interact and send messages to other colleges or external partners from any app in the Viindoo software. In the **Chatter** section:

- *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.

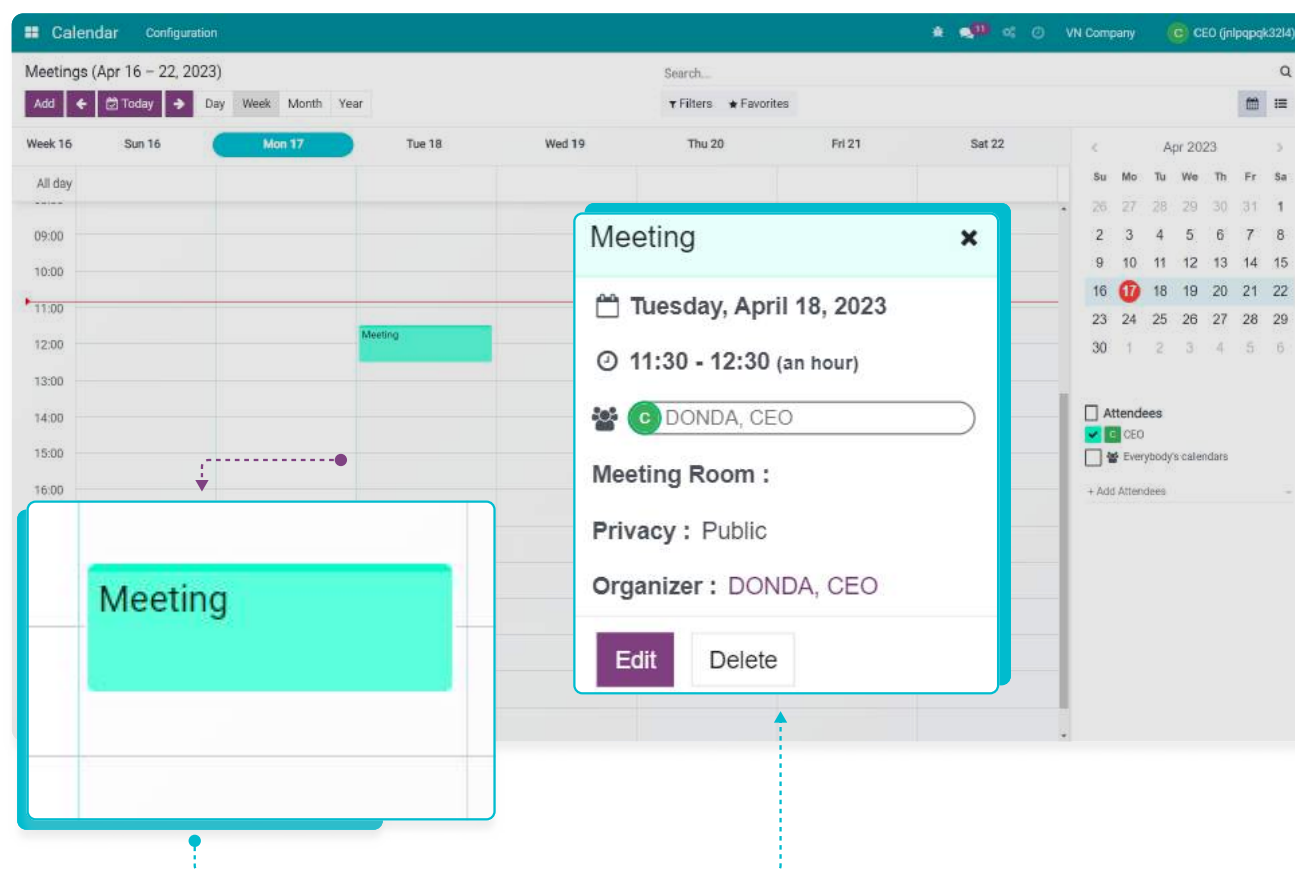


## BOOK AND TRACK MEETING SCHEDULES

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



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



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

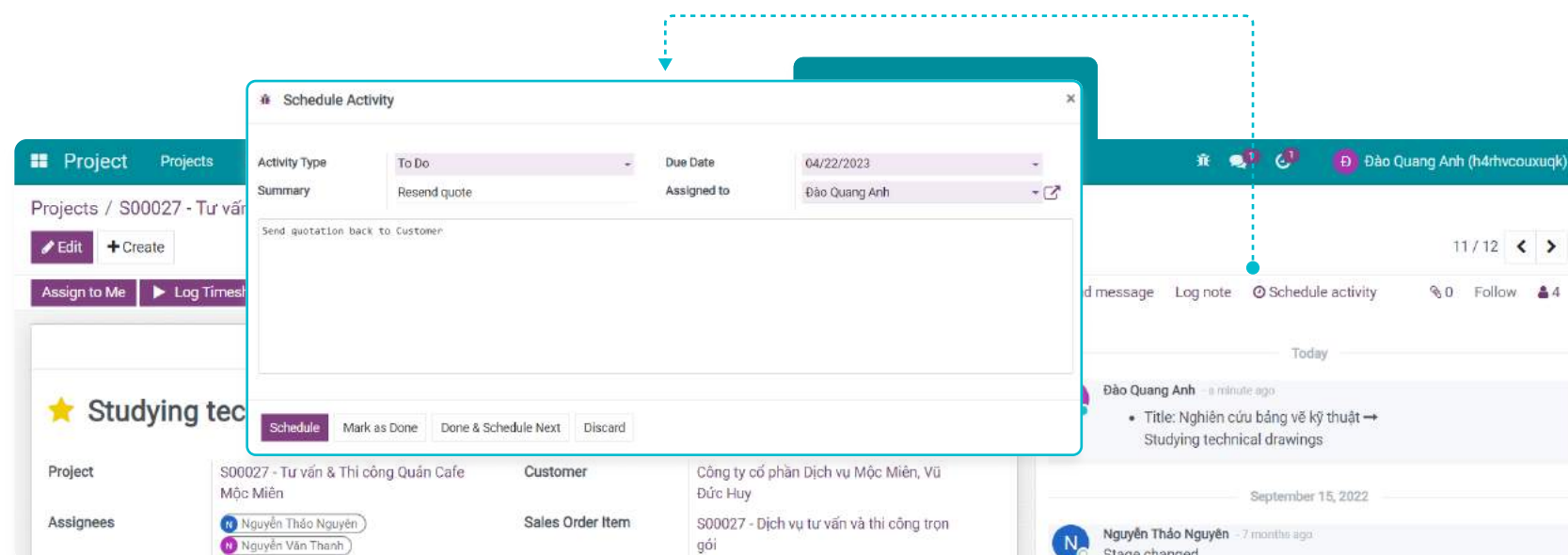
You can also quickly create a meeting on the Calendar view by clicking **Add**.

➡ See details at:

- [\*How to create a Calendar on Viindoo.\*](#)

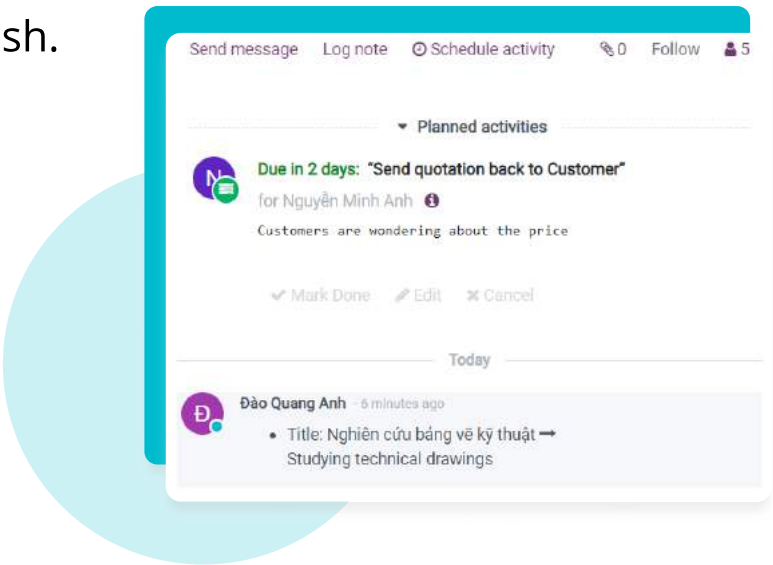
## MANAGE PERSONAL WORK AND ASSIGN WORK

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.



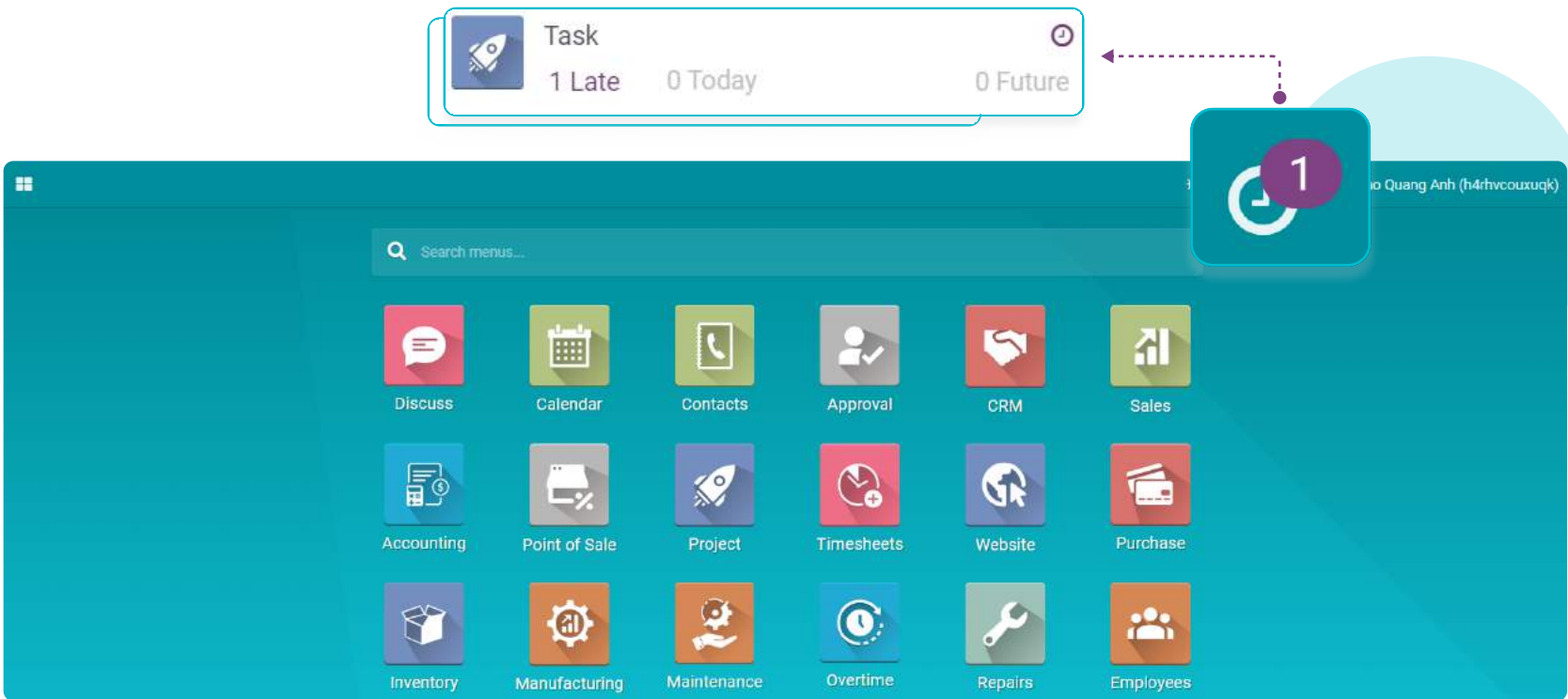
You must enter information such as the Activity Type, Due Date, and Assigned to yourself or others.

Then press **Schedule** to finish.

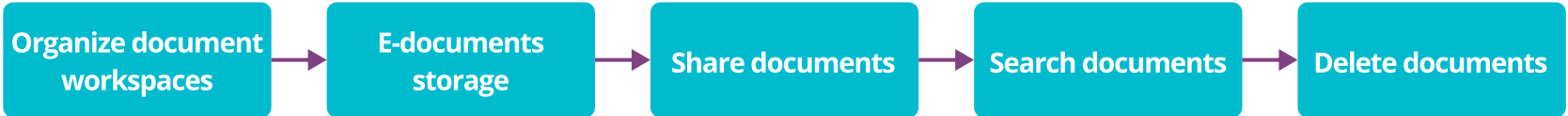


To review scheduled tasks, press the clock icon in the title bar.

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



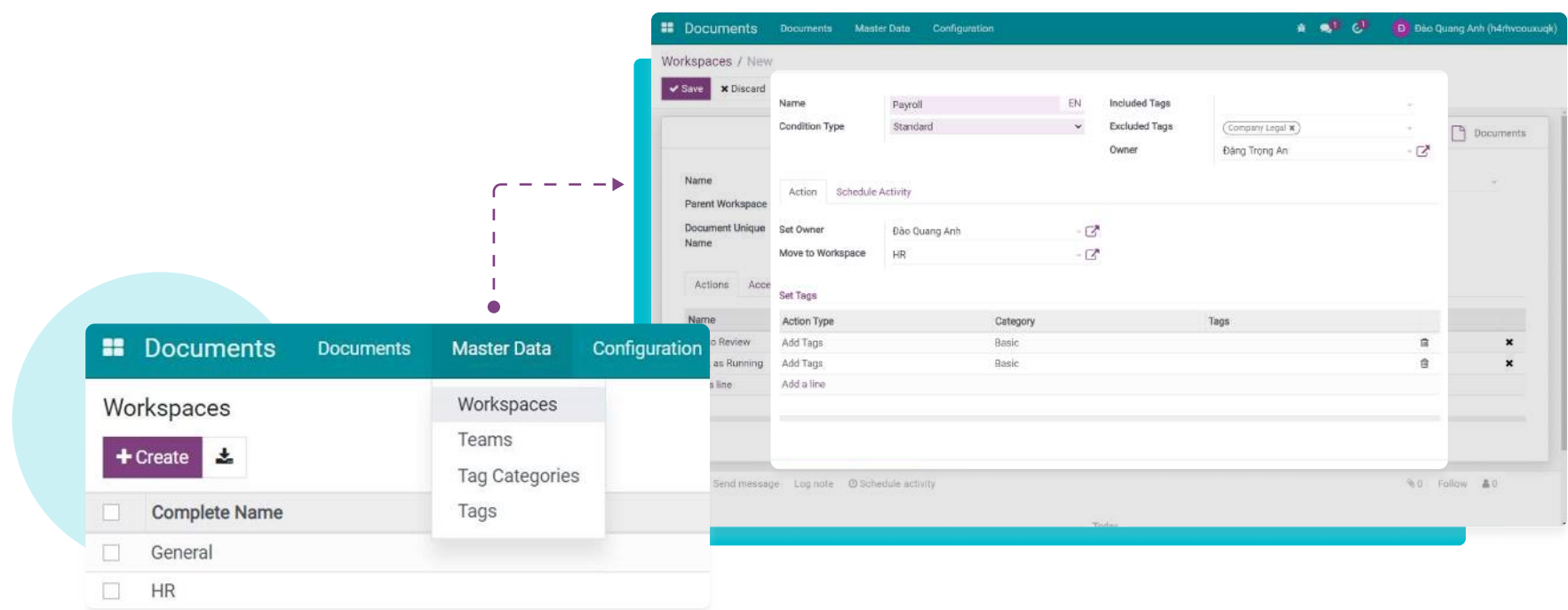
ORGANIZE DOCUMENT WORKSPACES



Organize document workspaces

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**.

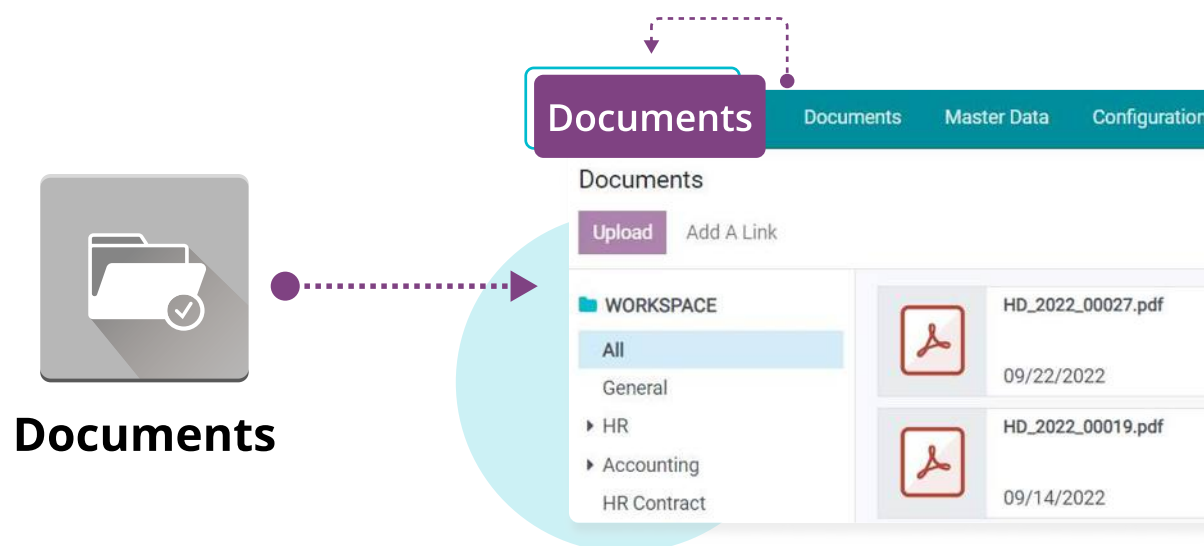




To create a sub-workspace, click a specific workspace. At the **Sub-Workspaces** tab, select **Add a line** and add the necessary information of the workspace to create a new one.

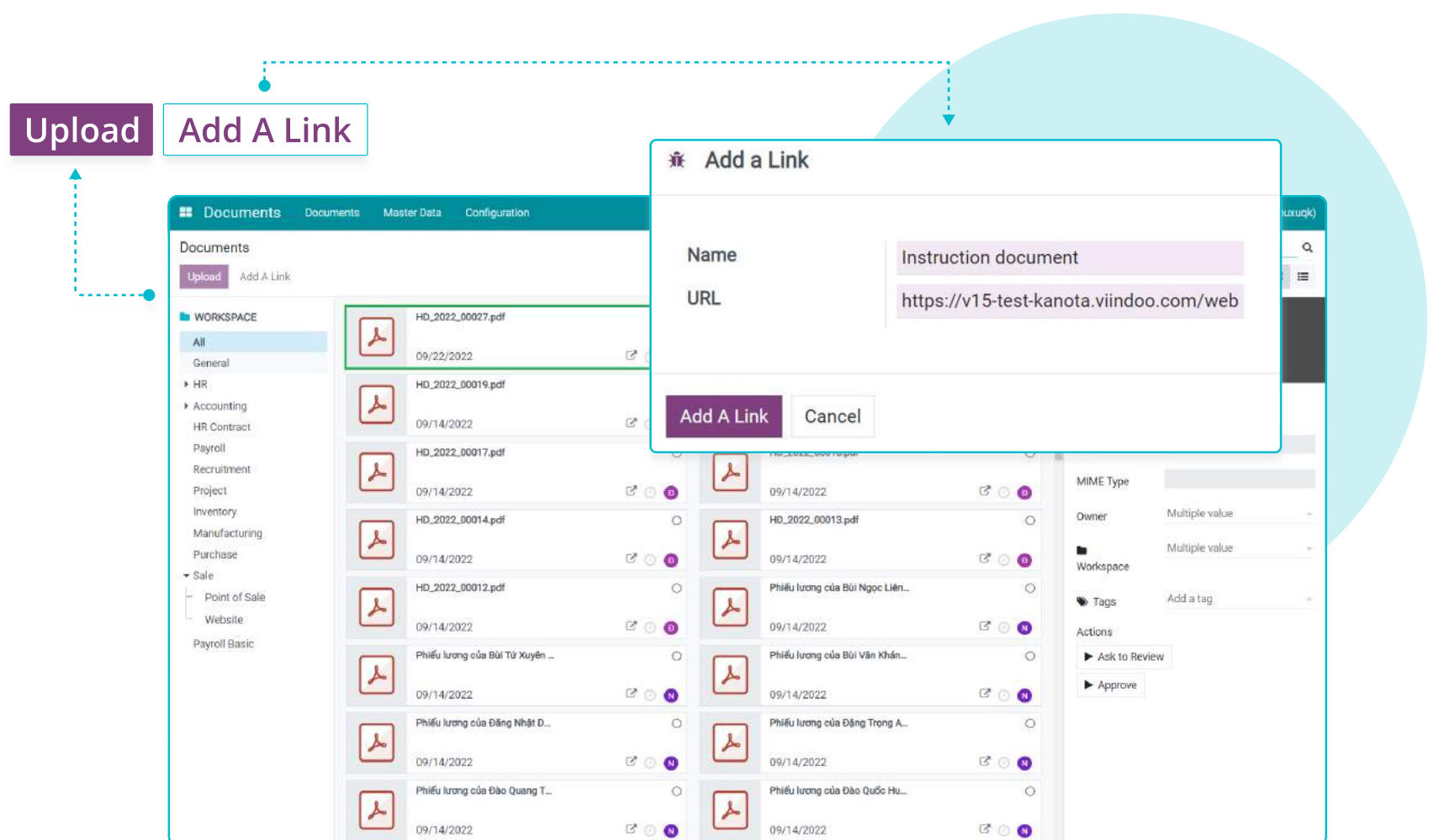
## E-documents storage

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



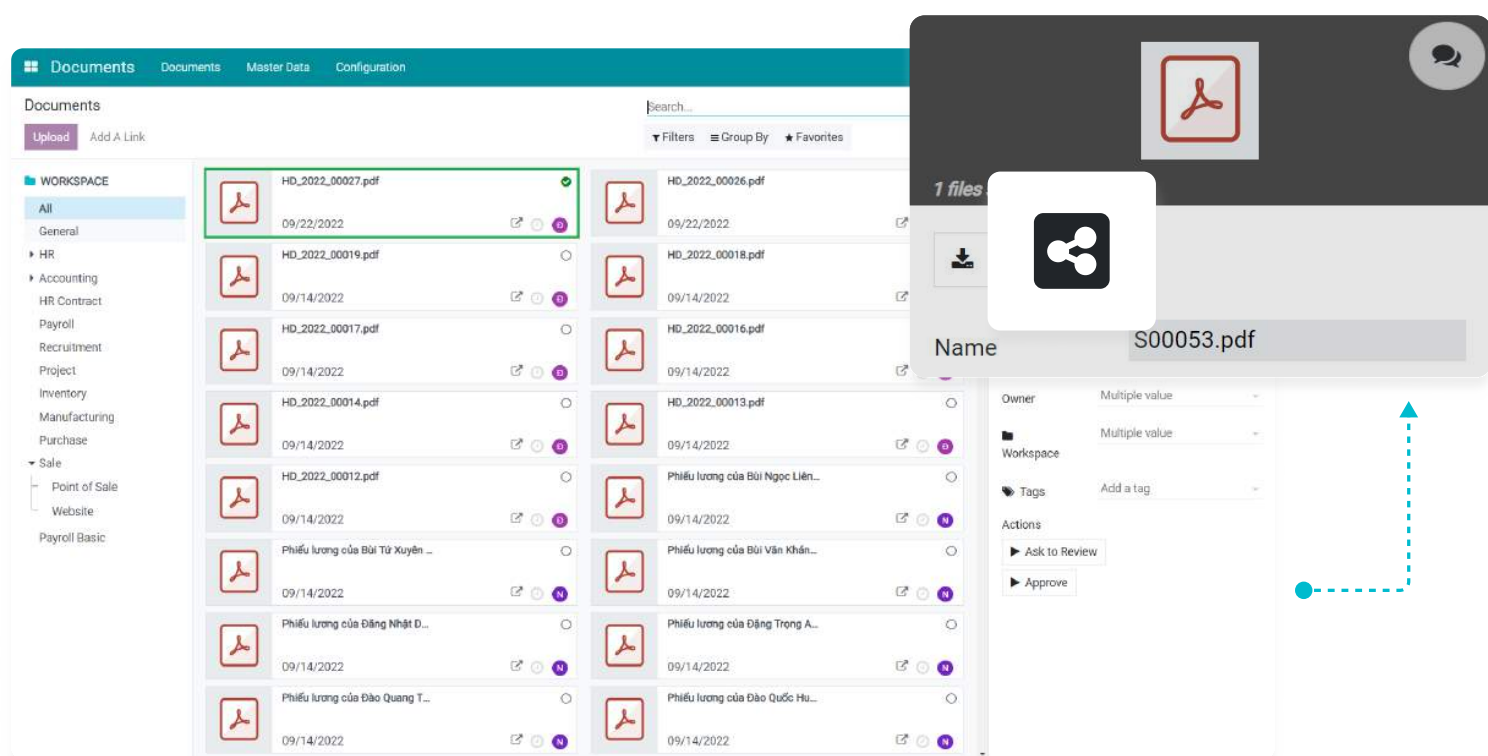
From here, select the workspace that you want to add documents from the tree diagram, then choose one of the following two options:

- 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.

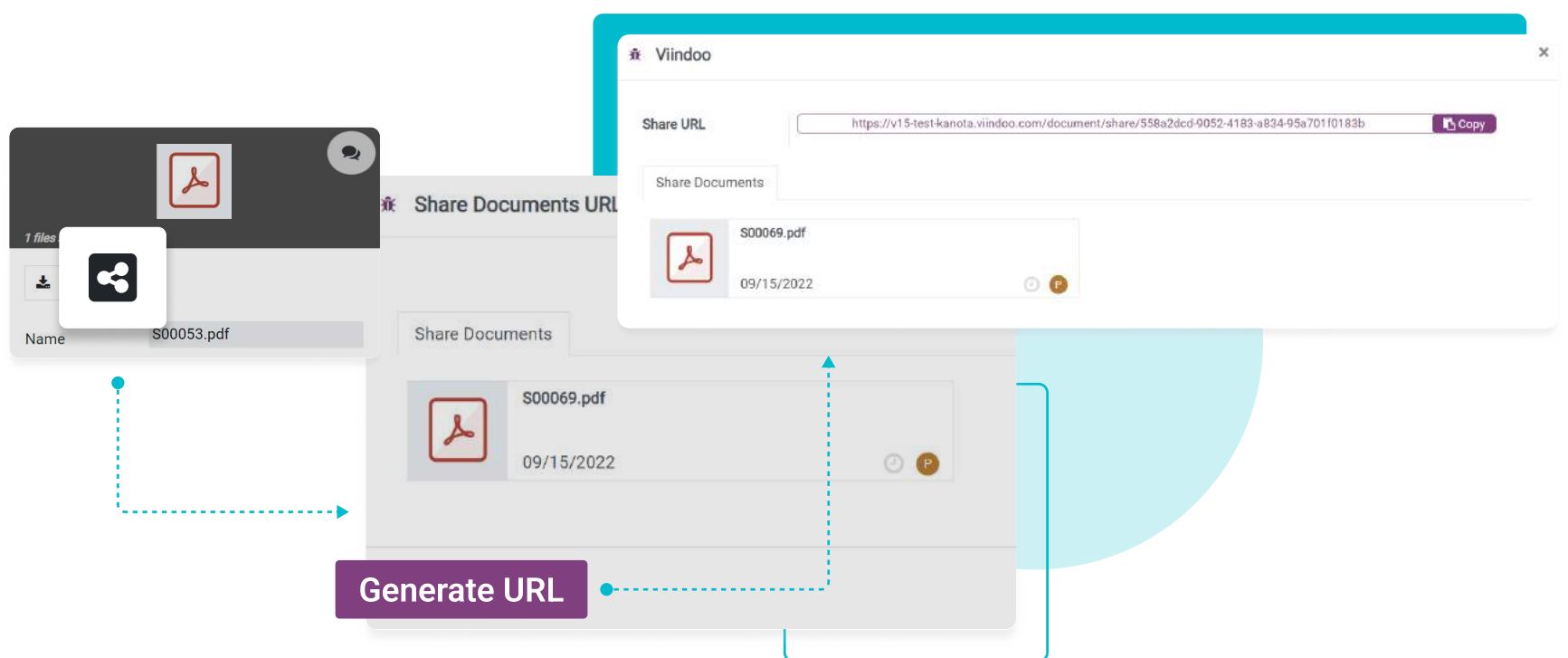


## Share documents

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.

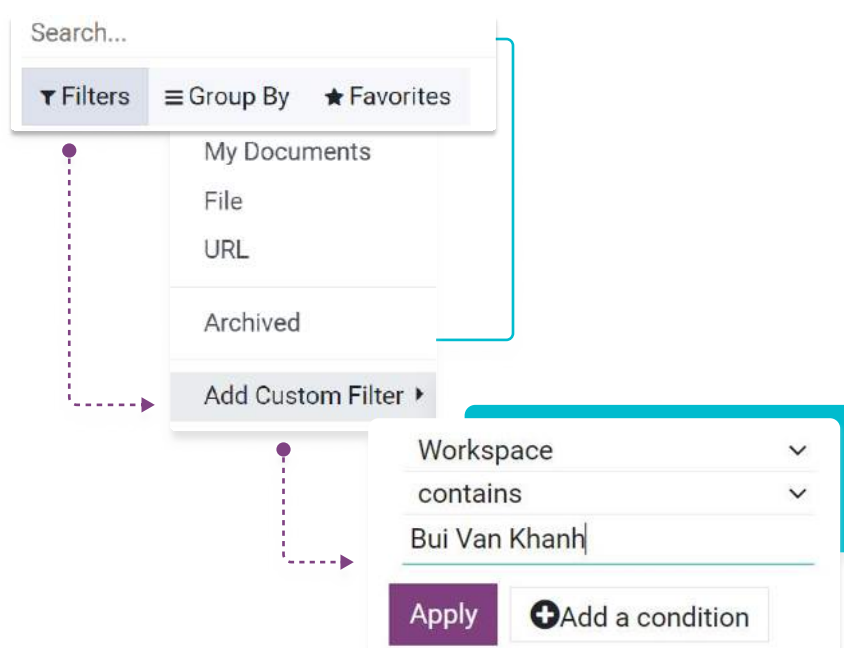
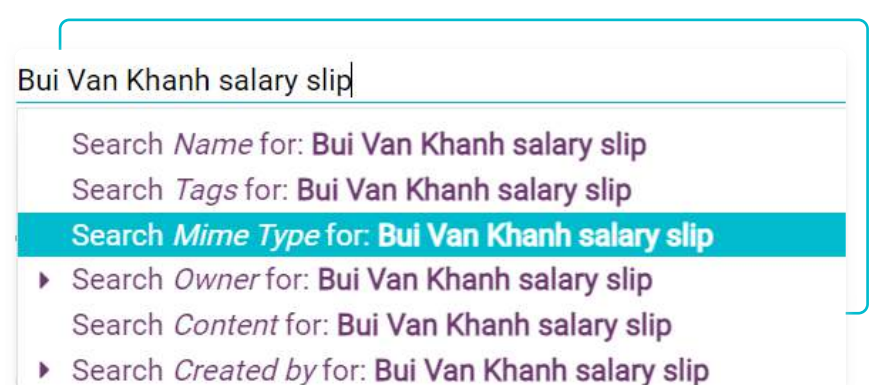


## Search for documents

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**.

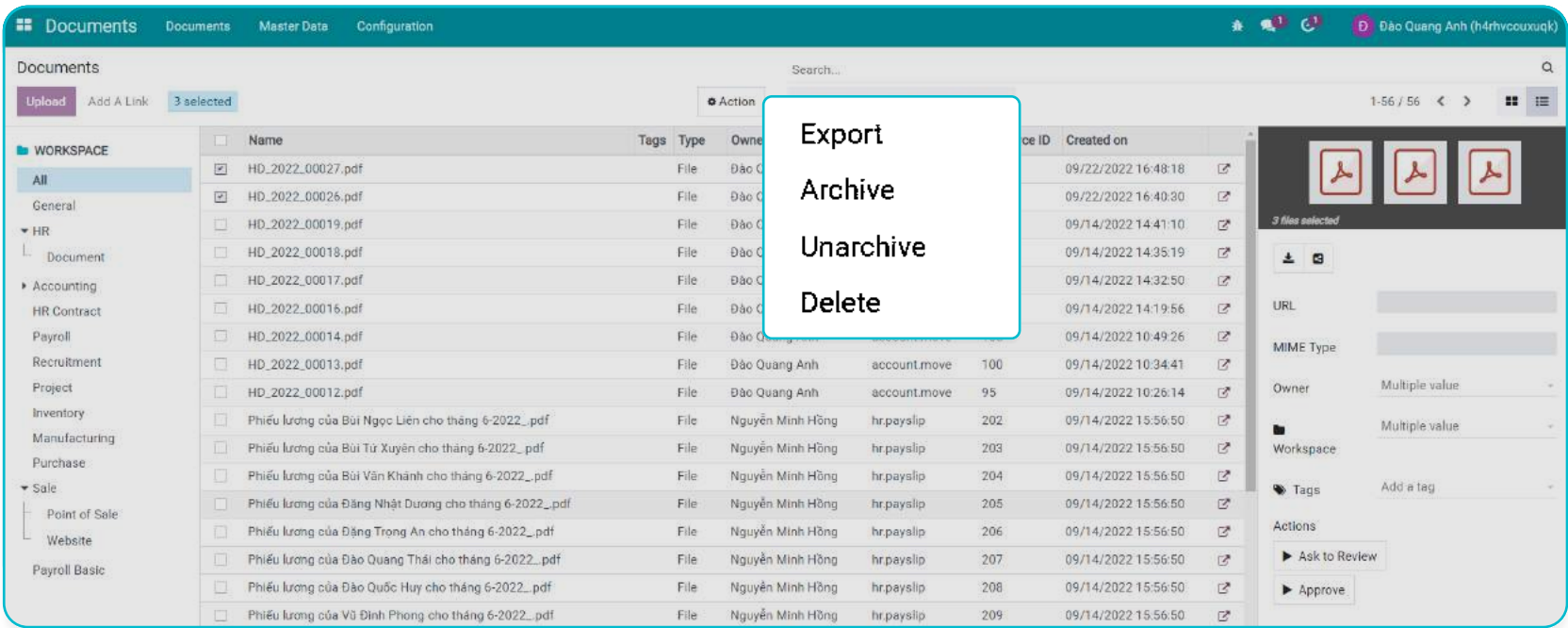
Documents related to the selected purchase order will be filtered out.



## Delete Document

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**.



## PROJECT MANAGEMENT



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.

### PROJECT PLANNING

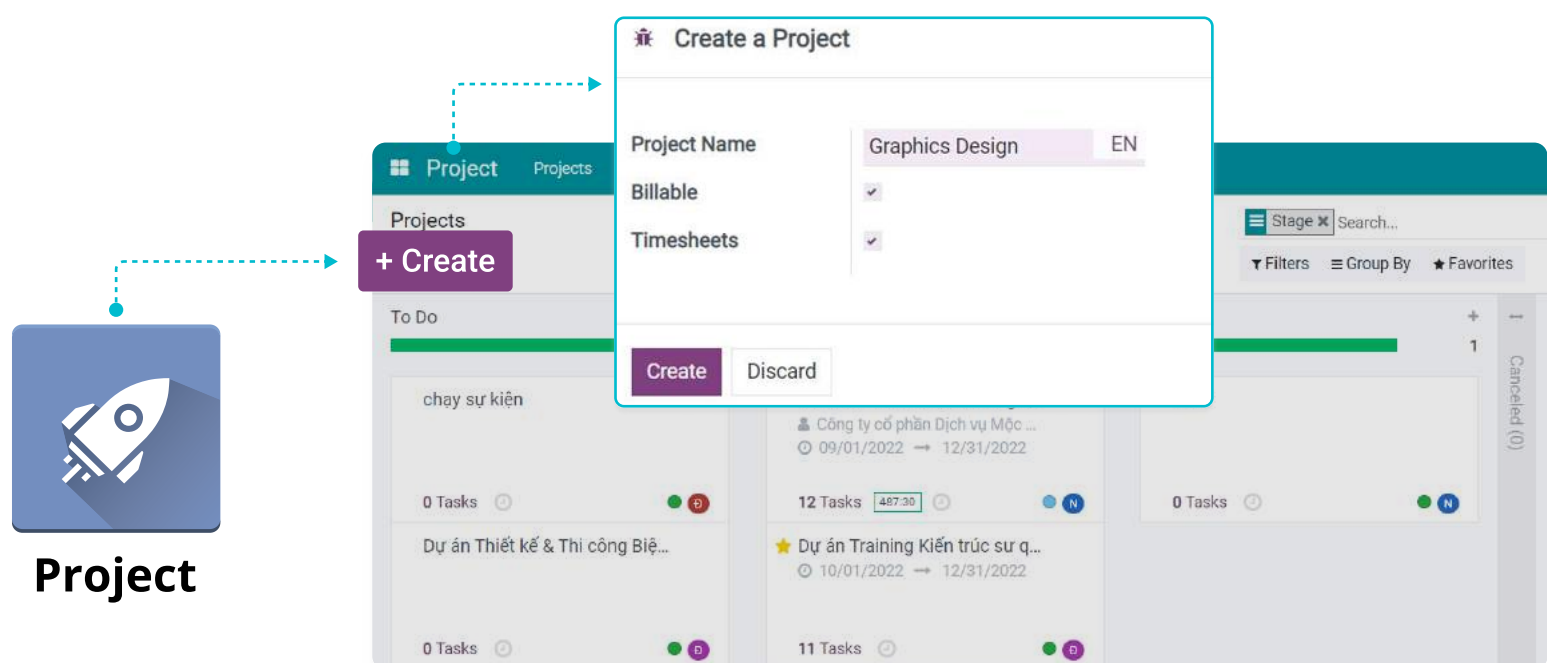


### Project creation

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*

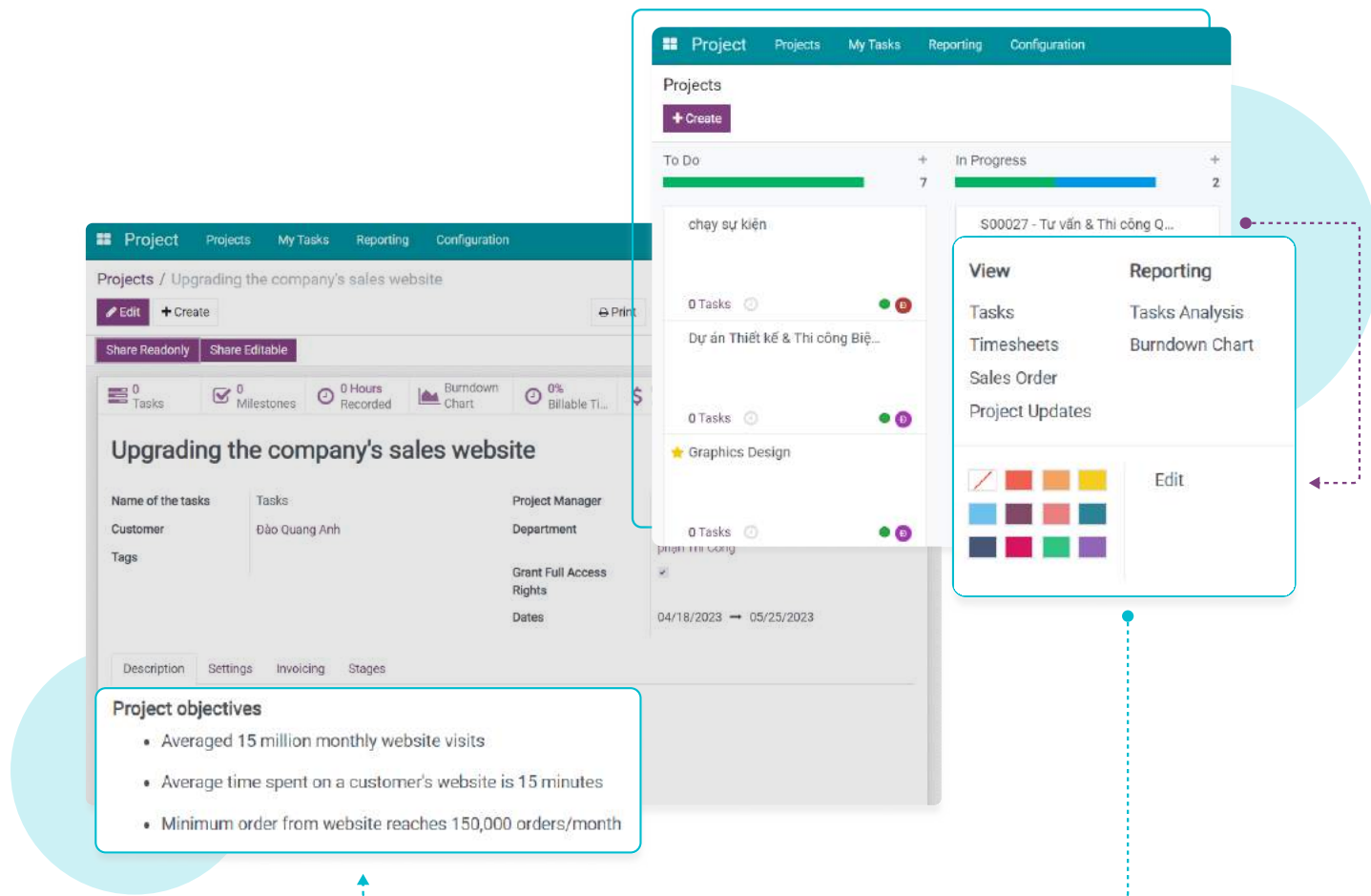
Navigate to the **Project** app, click **Create** to create a new project, and then enter the name of the project.



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

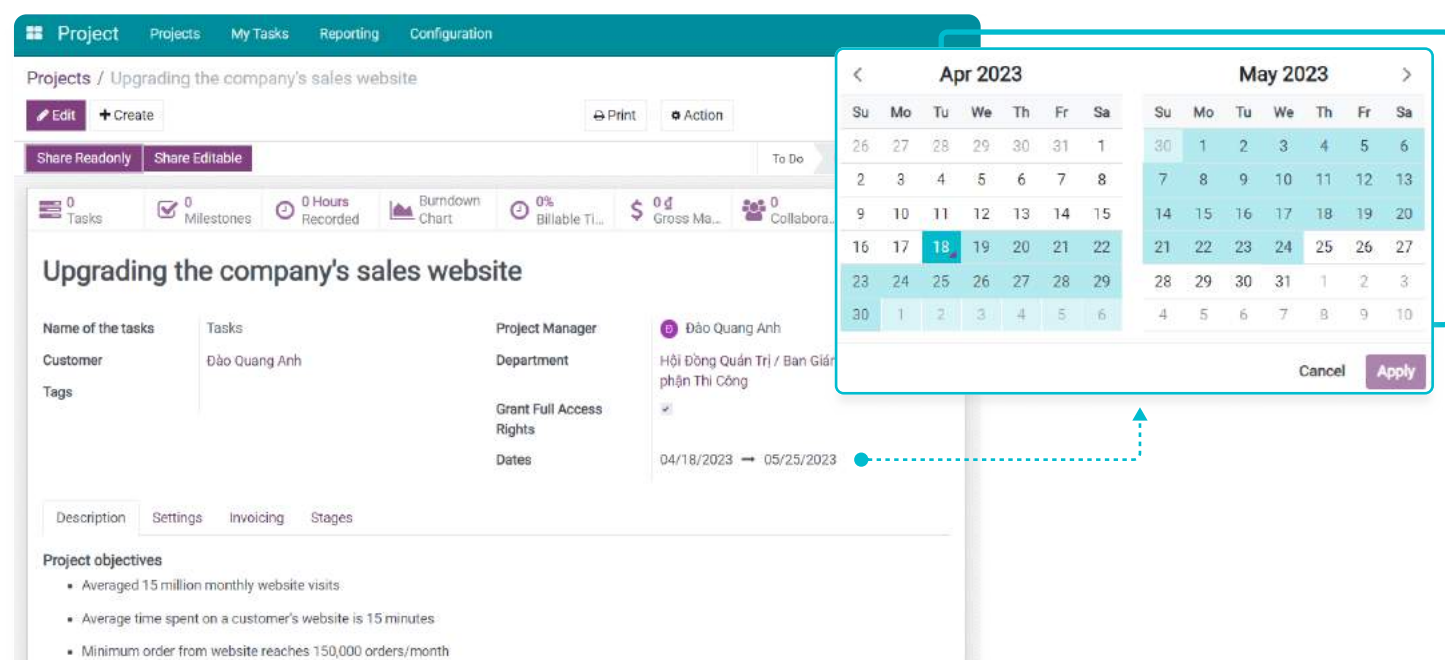
Determining project goals helps project managers to orientate and adjust the project-related tasks effectively and logically. Navigate to the **Project** app, select a project then click on the three-dot icon and press **Edit**.



In the Description tab, add details for 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**.

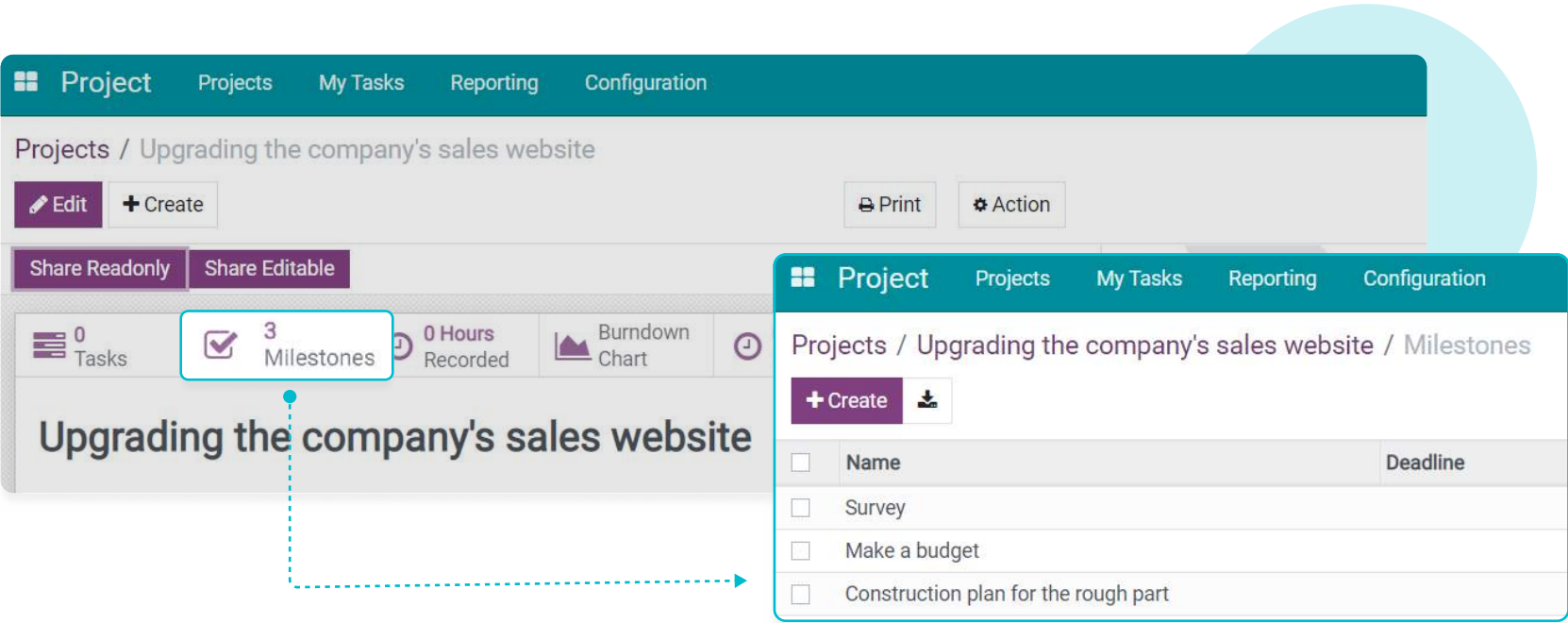




Define the milestones for the project

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

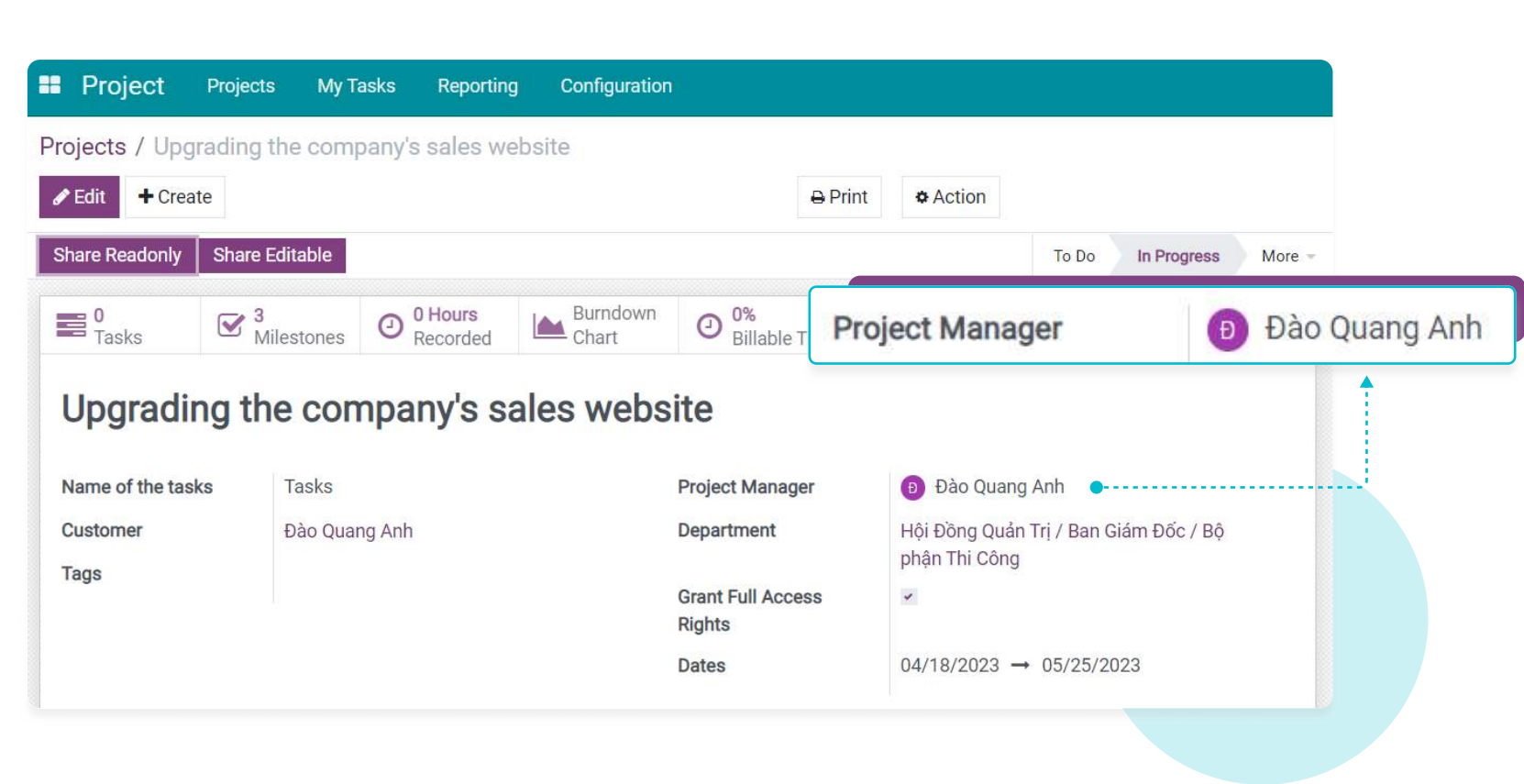
On the project interface, click on **Milestones** then press **Create** to set up a milestone.



Establish project member list and secure information

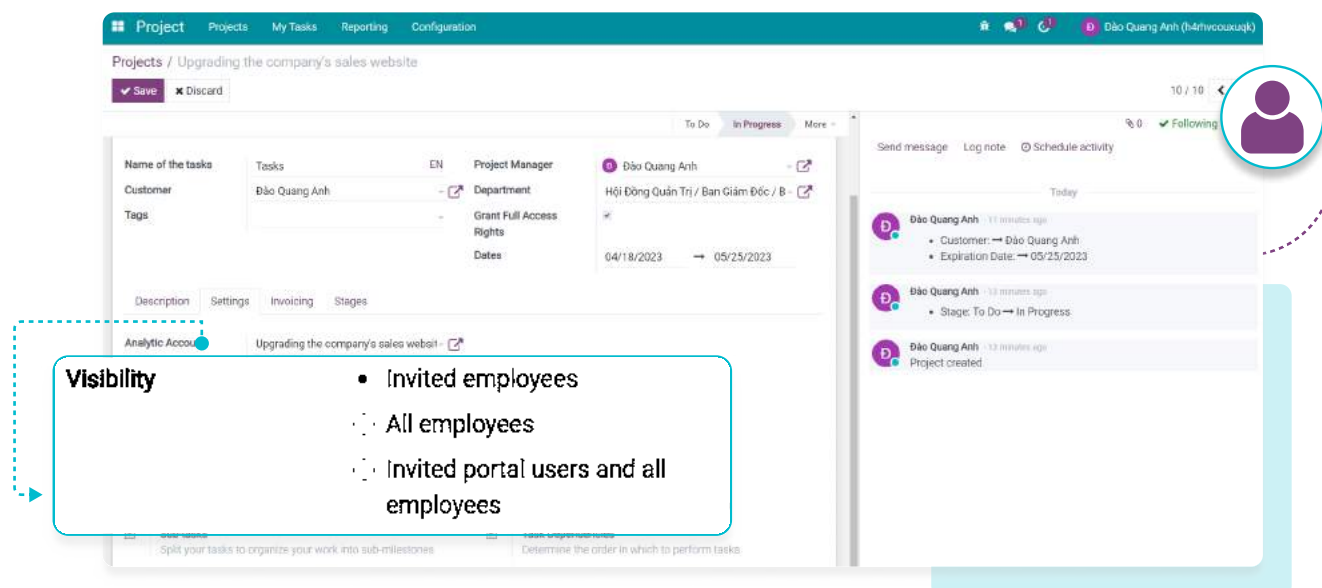
Assign a project manager


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

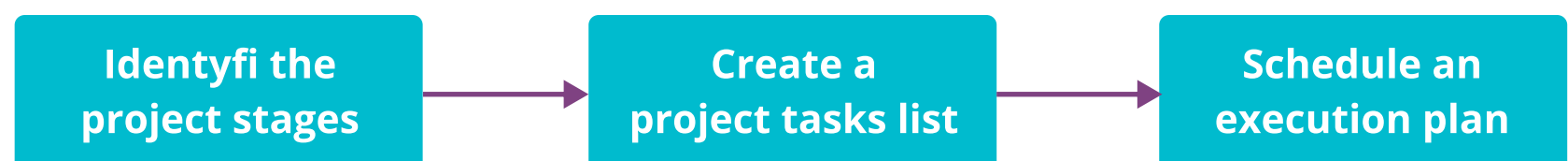
On the project interface, switch to the **Settings** tab and go to the **Visibility** section. Here, you can set up project information security as well as invite project members.



- **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.

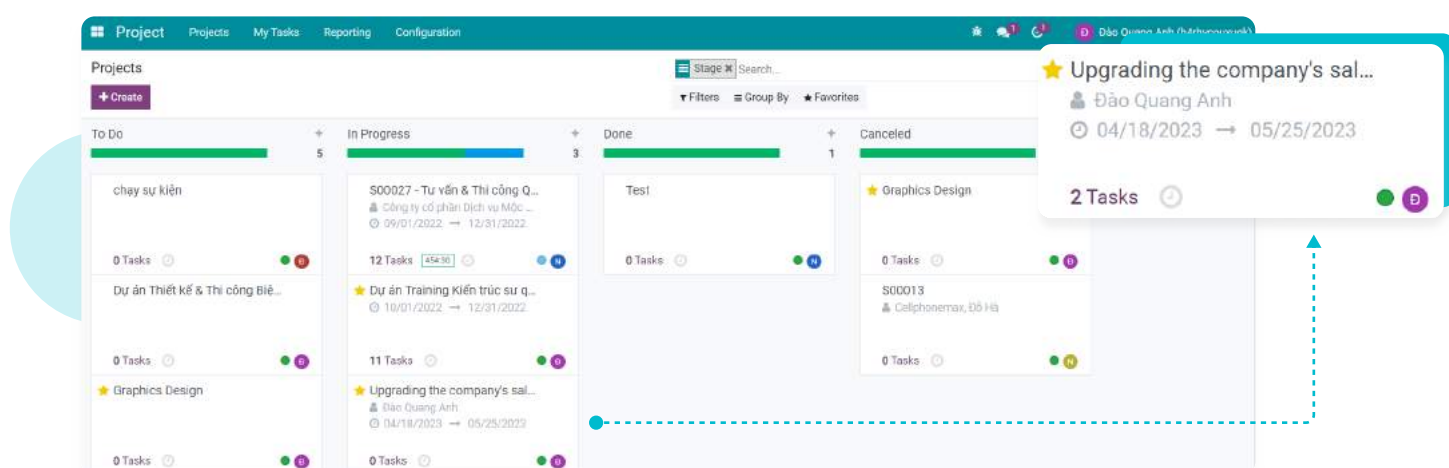
In addition, you can choose **All employees** if the project requires the participation of all members in the company. Select **Invited portal users and all employees** if your project requires the participation of both customers and all employees.

## Plan the project implementation

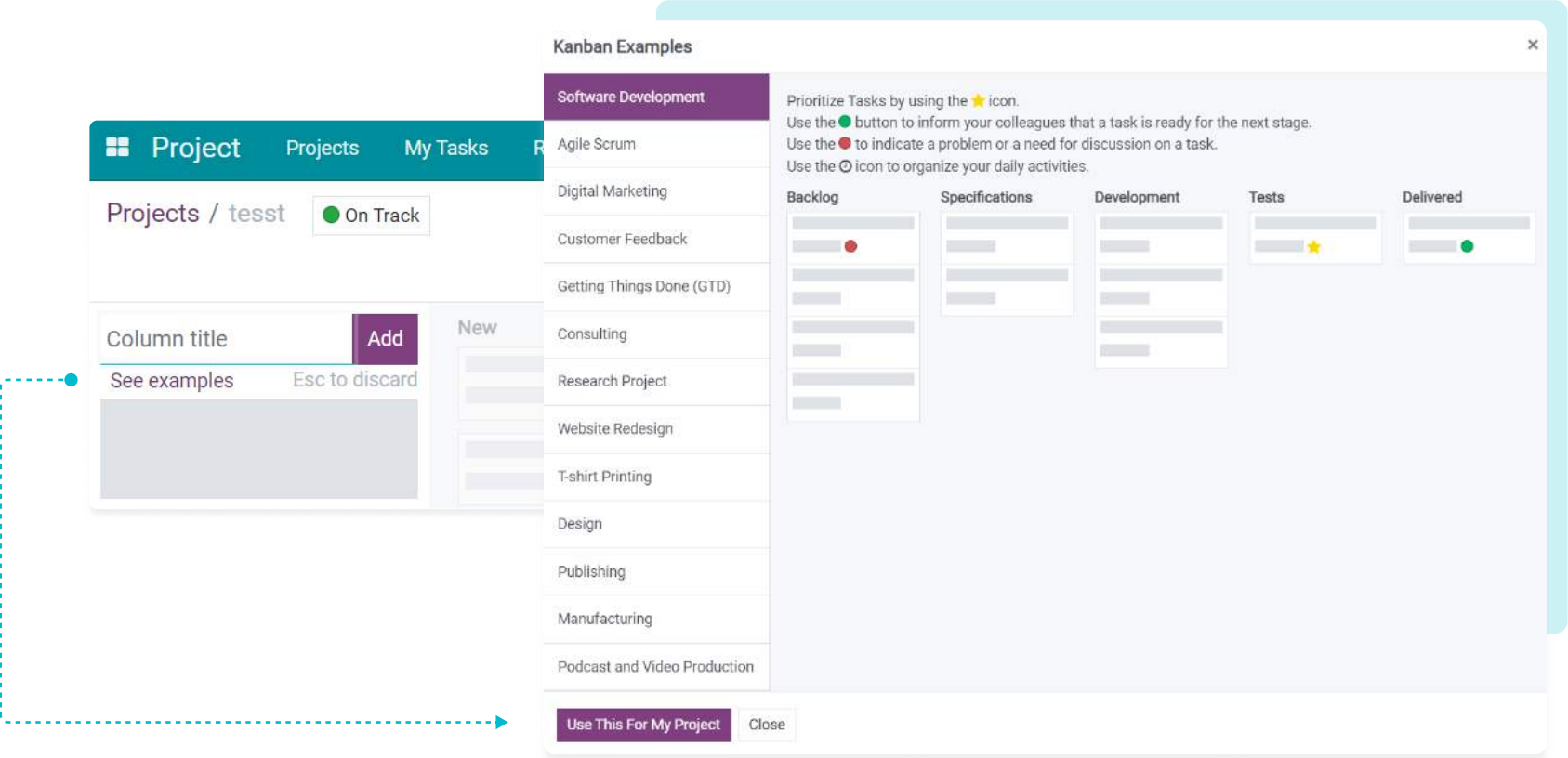



### Identify the project stages

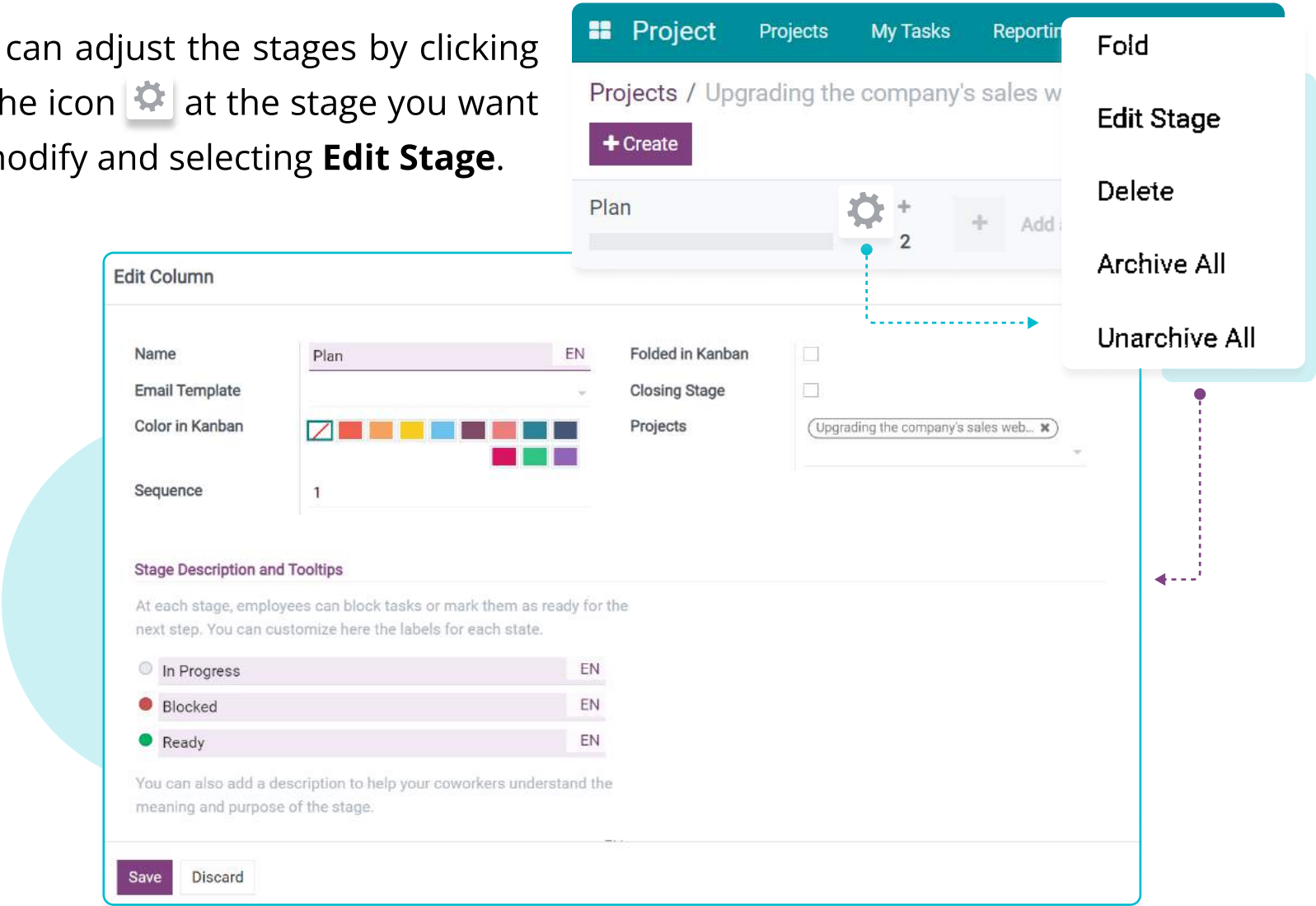
The project manager needs to determine the stages that the project will go through that are suitable for the process and their management style. Then, access the **Project** application, select the project you just created:



Here, you enter the name of the stage, press **Add**. You can also use 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**.



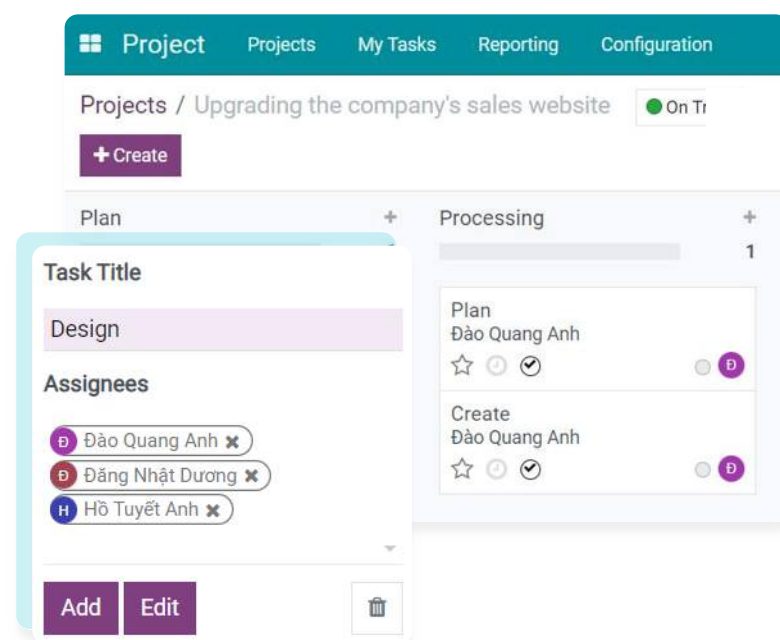
- ➡ See details at:
- [Configuring stages for tasks.](#)



## 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:

Add **Task Title** and **Assignees** for each task then click **Add** to create a new task.

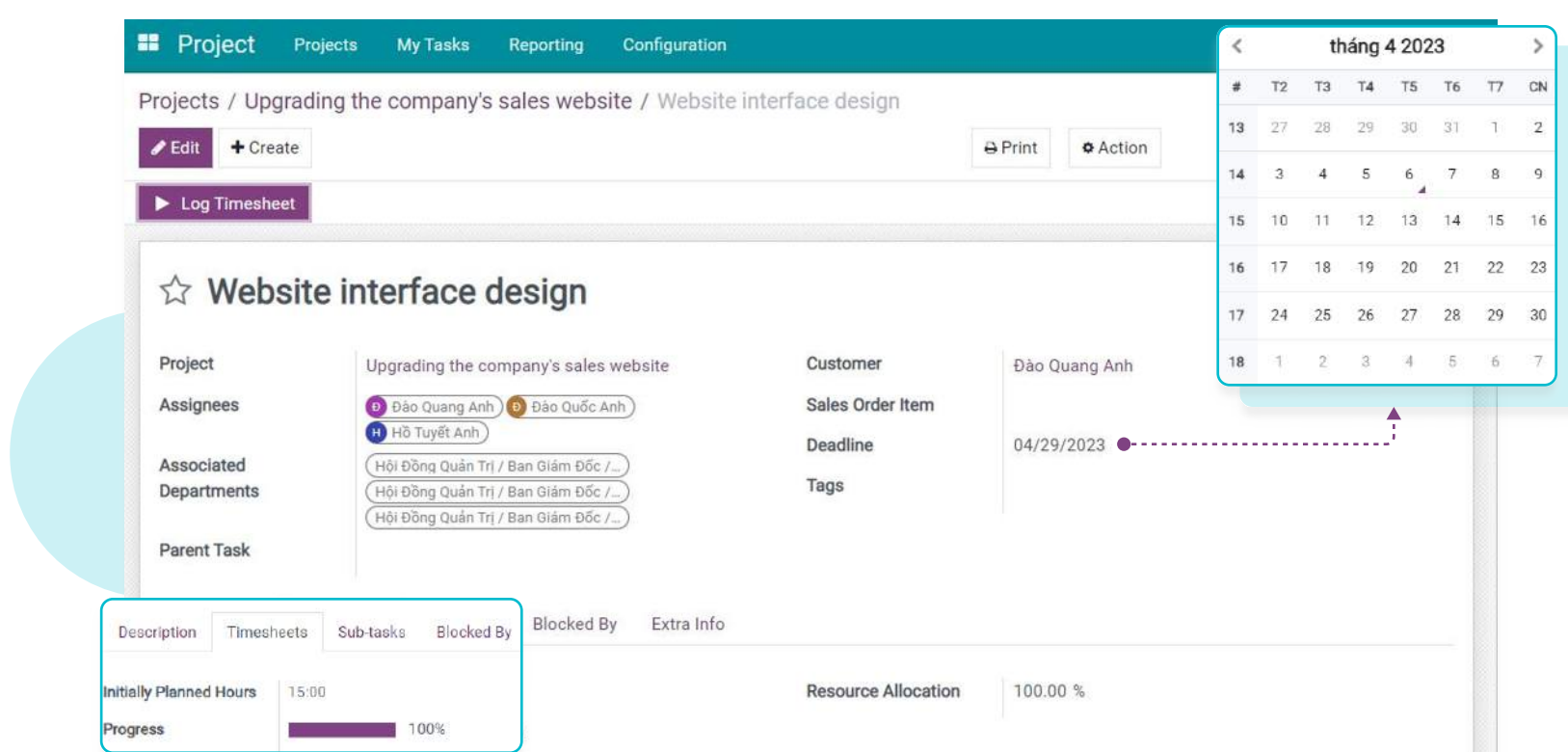


## Schedule an execution plan

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. From this data, at the end of the project, you will have information to evaluate the effectiveness of the project members' work.

*Configure initially planned hours and deadline for the task*

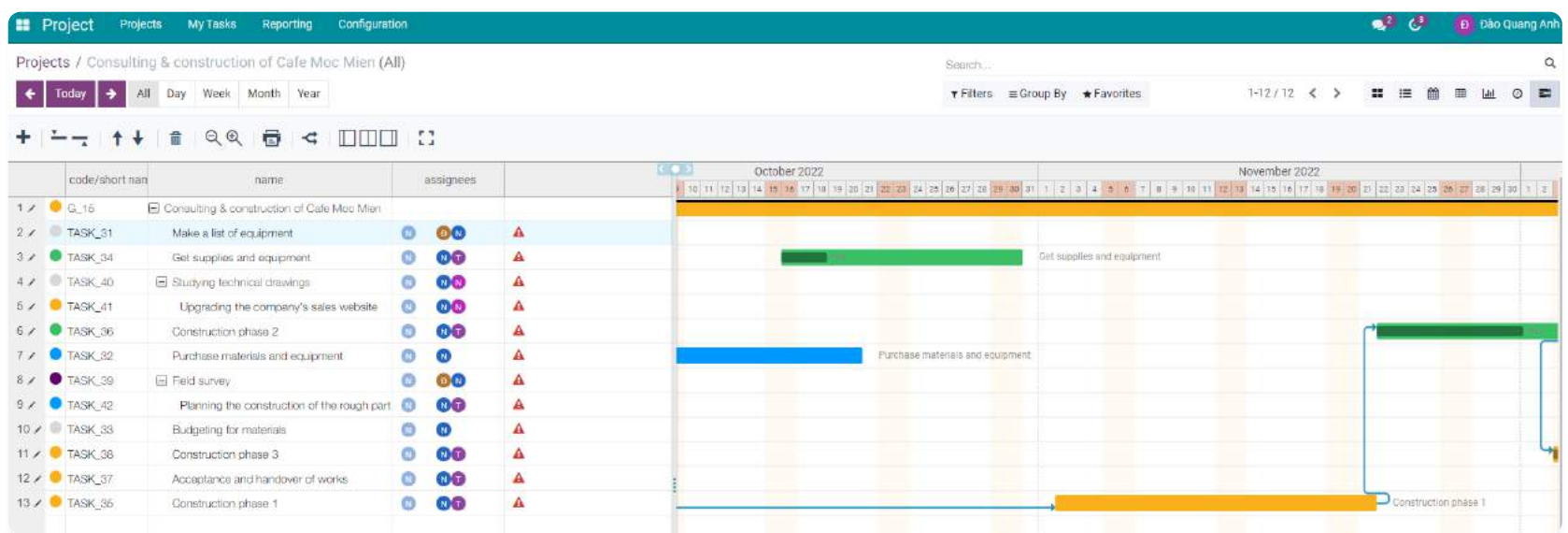
Navigate to the **Project** app, select the task to plan, navigate to the **Timesheets** tab and enter the estimated hours for the task in the **Initial Planned Hours** field.



In the **Deadline** field, 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 using a Gantt chart, click on the Gantt chart icon.

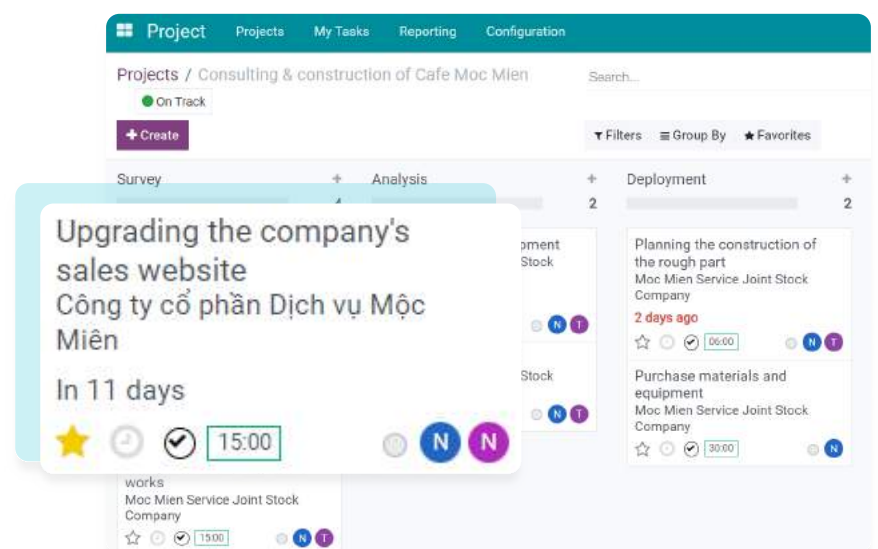


With this view, you can:

- 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 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.

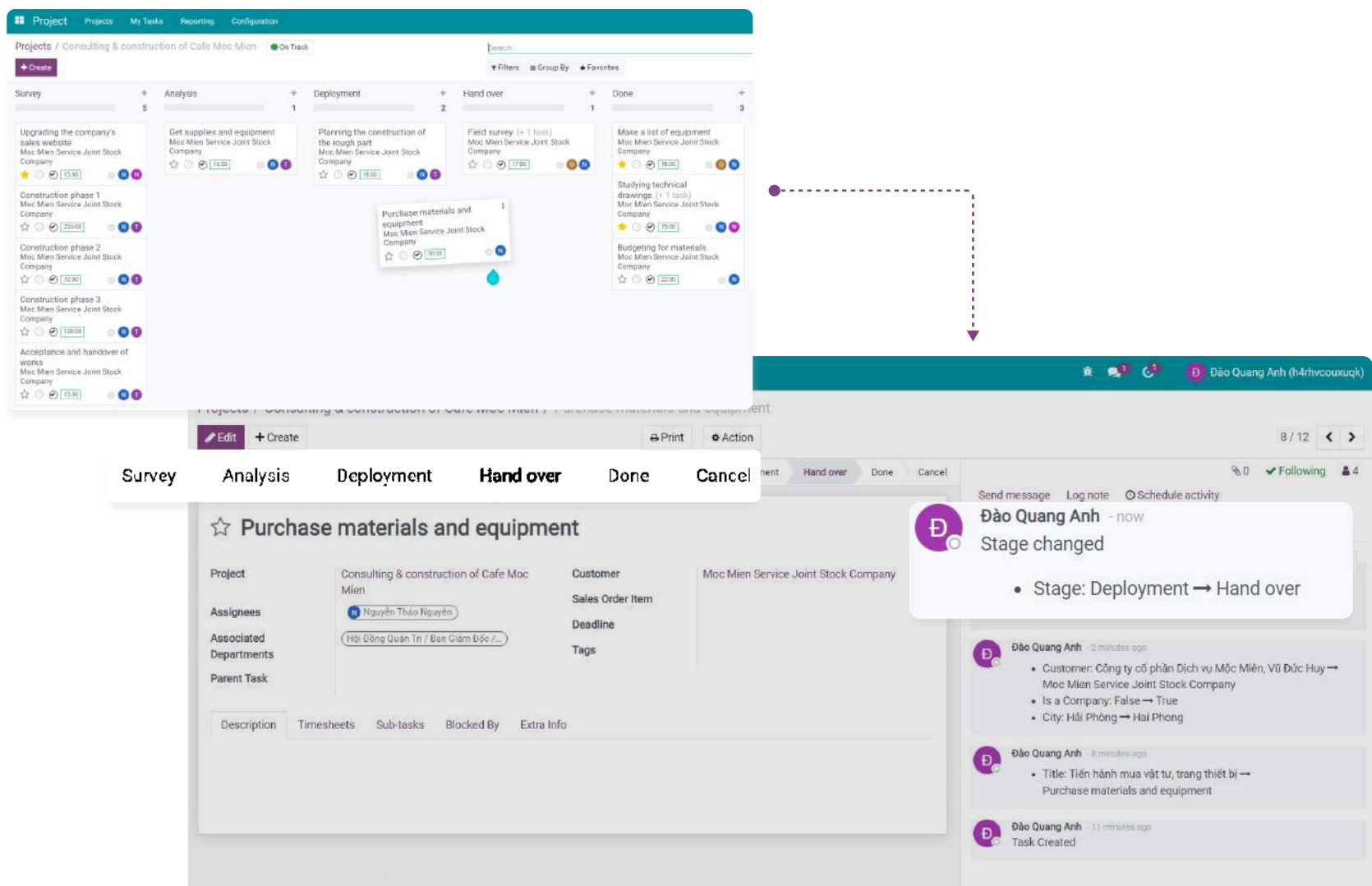


## PROJECT IMPLEMENTATION

### Members performing tasks in the project

#### Update task stage

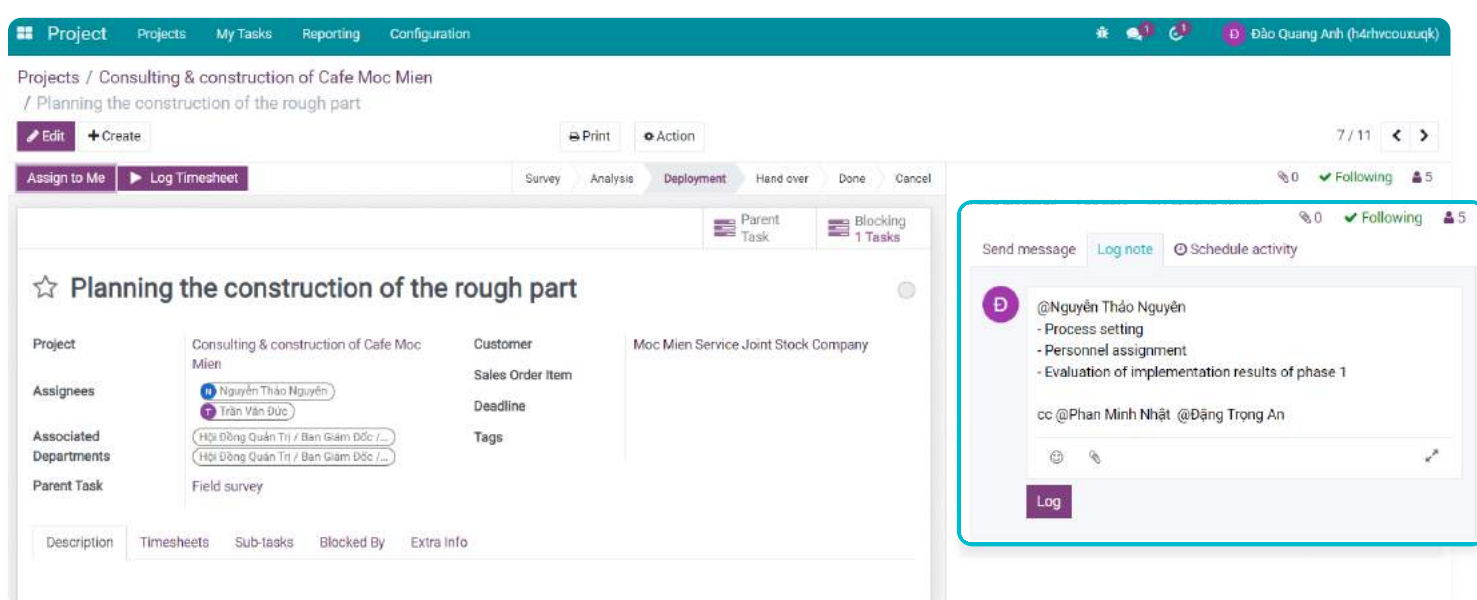
When starting a task or when your task meets the criteria to move to a new stage, you can change the stage by dragging and dropping the task on the Kanban interface or click the status change button on the task interface.



After clicking the stage change button, the system will also update the stage change history in the **Chatter** section.

### Communication between project members

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

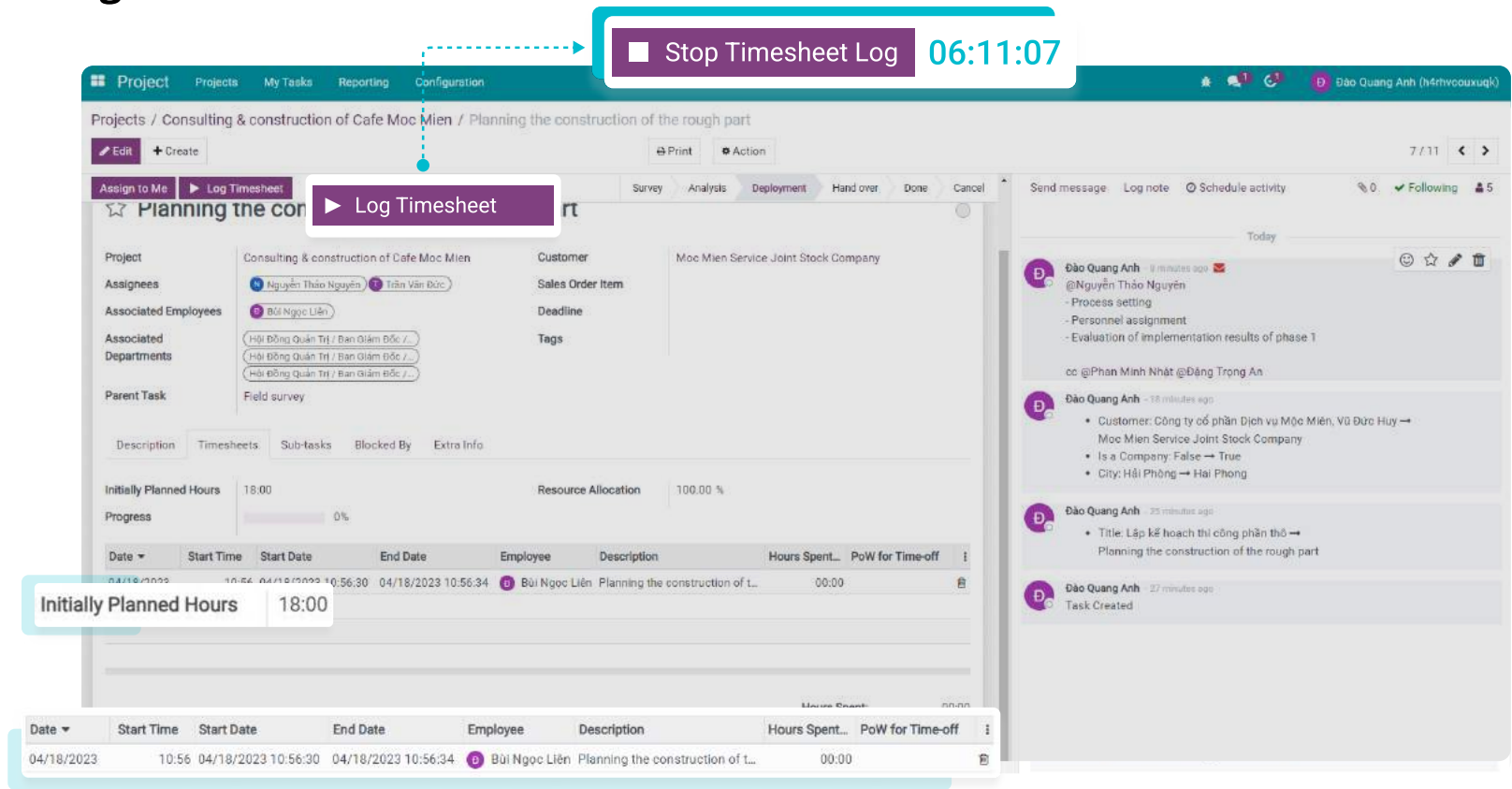




Time tracking

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

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



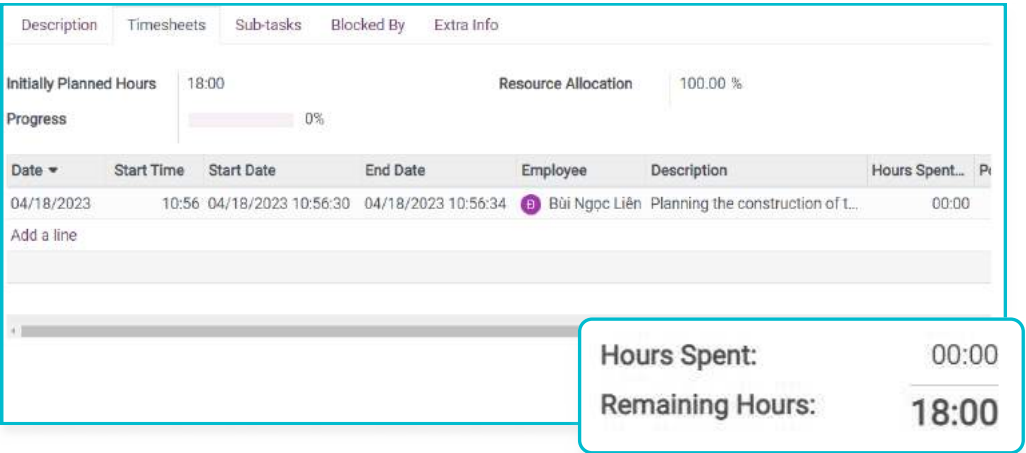
Note that you should only click this button when you start working on a project task. When you are not working on the task, click the **Stop Timesheet Log** button to record the actual time you spent on the task.

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.

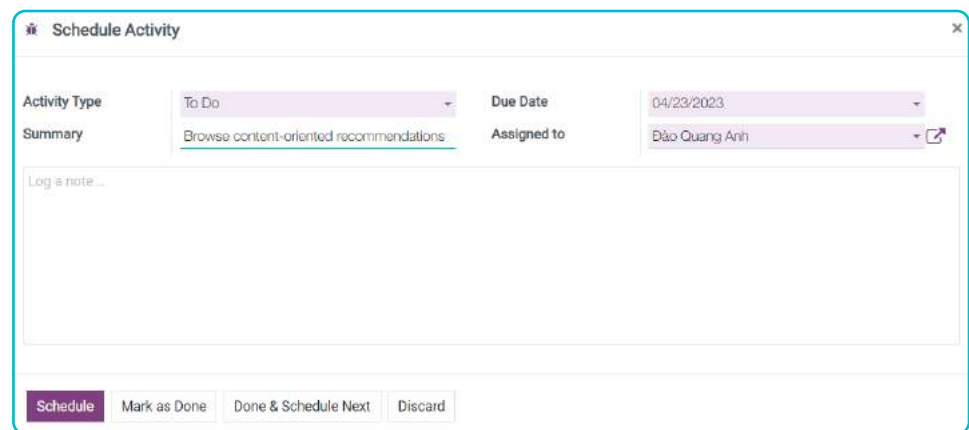
You can view the statistics of **Hours Spent** and **Remaining Hours** to decide to reallocate your time or speed up to complete the task.



## Plan personal task execution

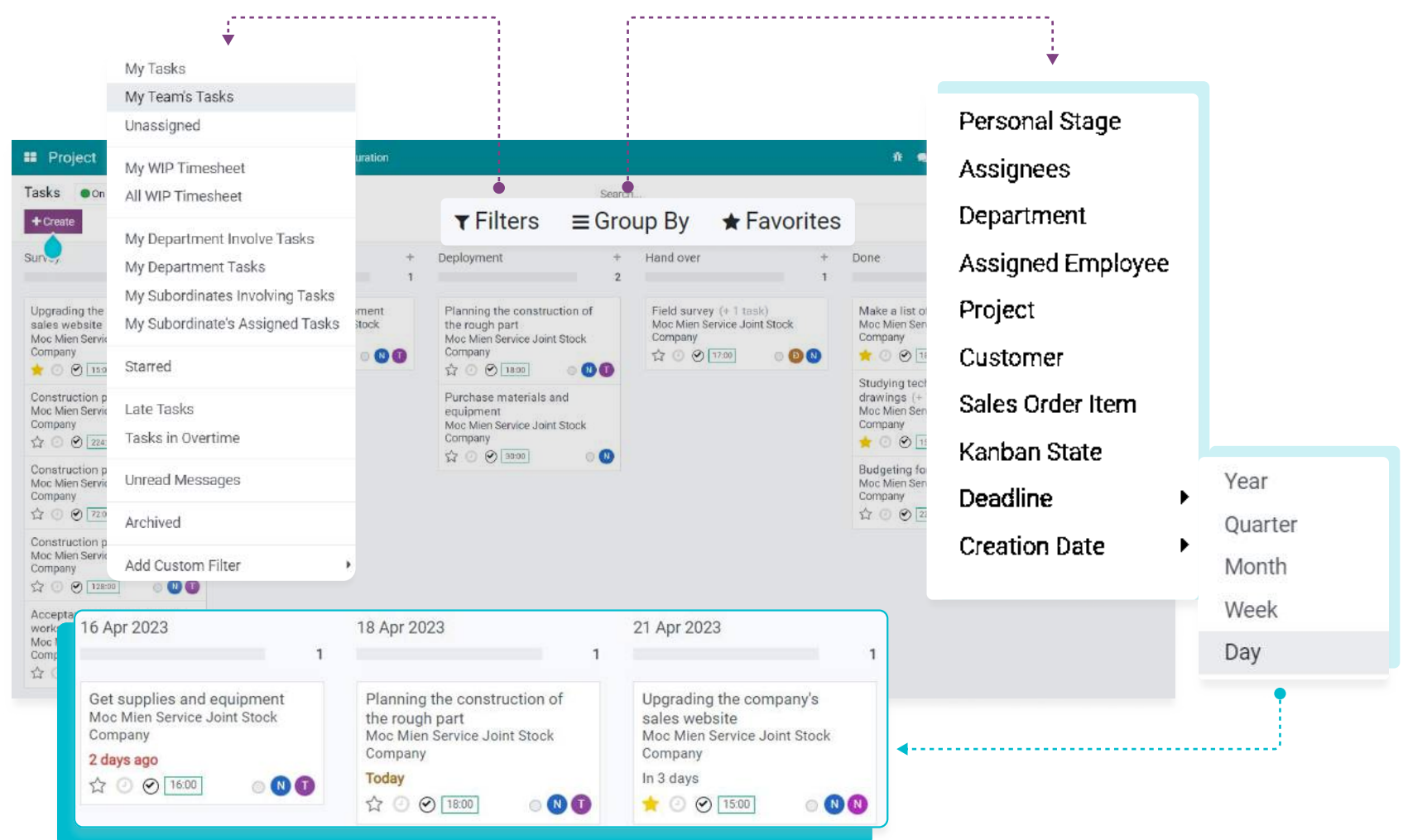
### Planning personal task by using the Schedule Activity feature

You can refer to the [Schedule Activity \(Page 38\)](#) 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**, **My Tasks** (Tasks assigned to yourself), etc. You can also combine filters to find desired tasks.



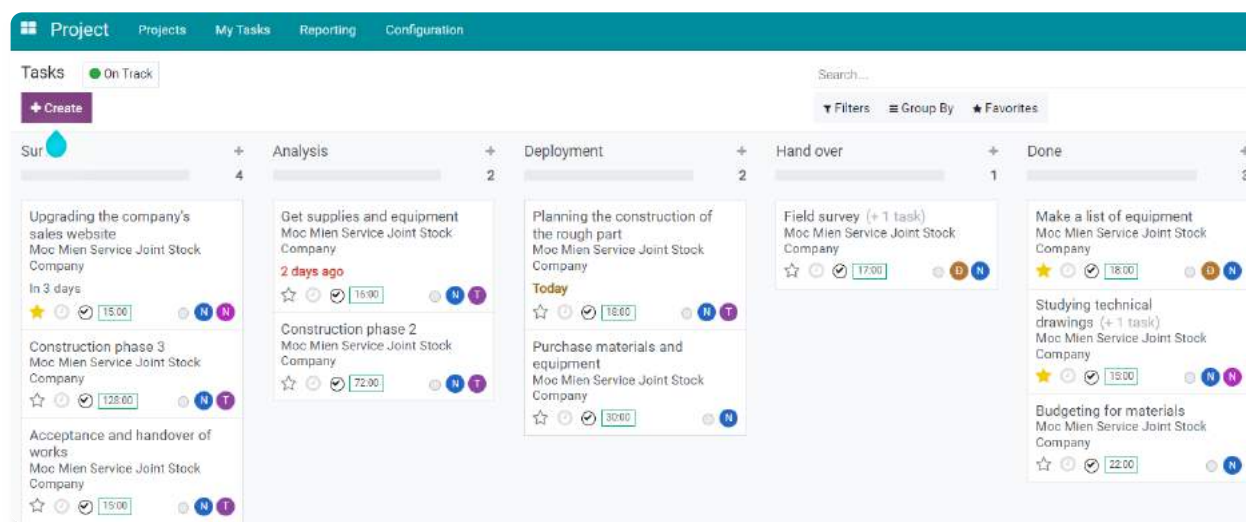
Additionally, you can use the **Group By** feature to group tasks such as by **Deadline** to quickly see tasks that need to be prioritized to meet the deadline.

## Project Manager

### *Tracking project progress*

#### *Tracking with Kanban board*

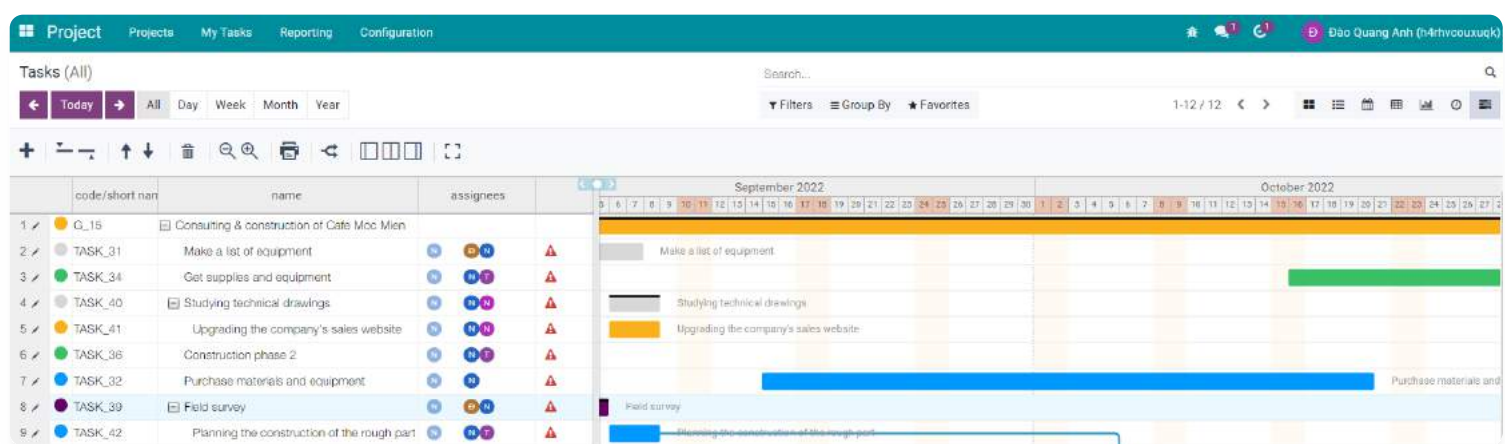
On the Kanban board interface, the project manager can easily grasp information on the progress of task processing, such as the number of tasks in each stage, the number of tasks still in progress, the number of tasks that have been completed, and so on.



Additionally, project managers can [use filters and groups to manage tasks \(Page 53\)](#) 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.



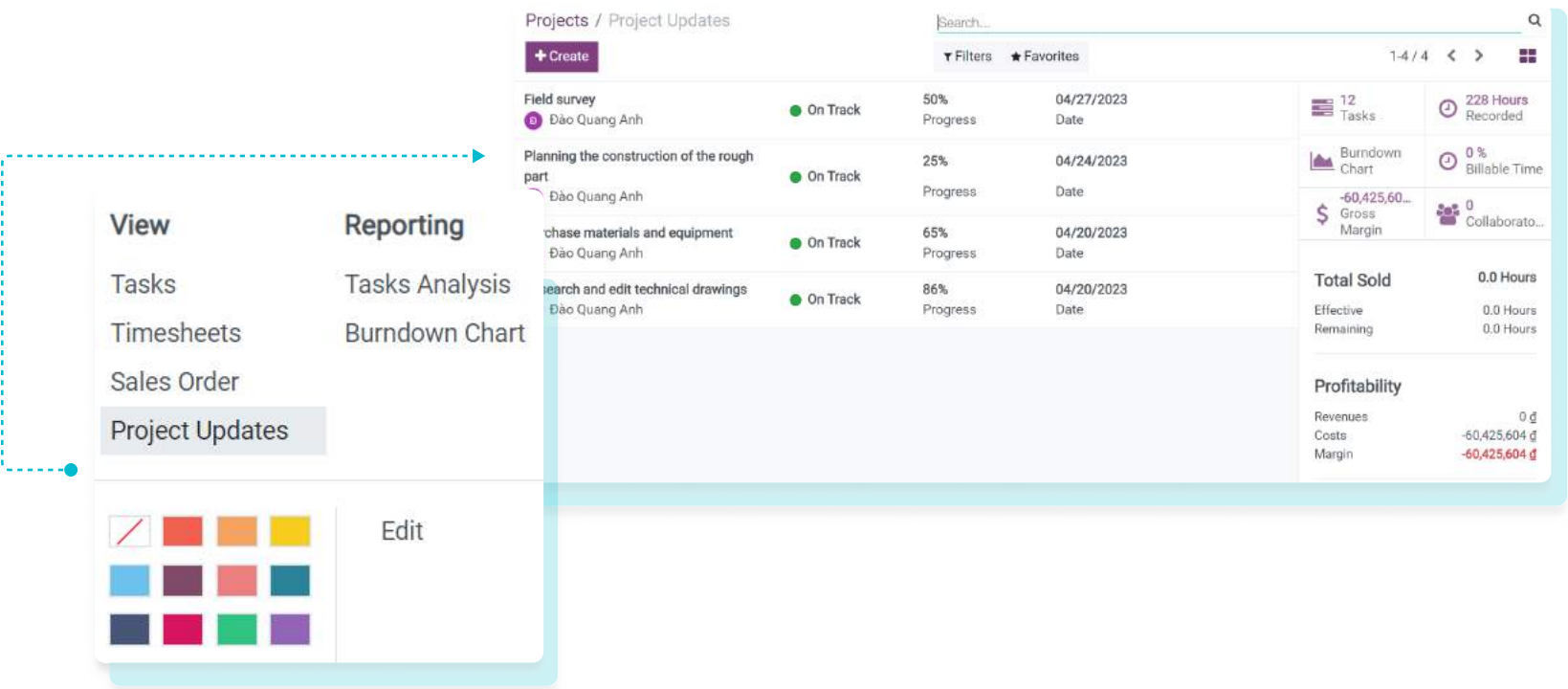
Gantt chart allows you to track the project progress in multiple aspects, such as:

- 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. Select **Project Updates** and click on **Create** to create a new project update.

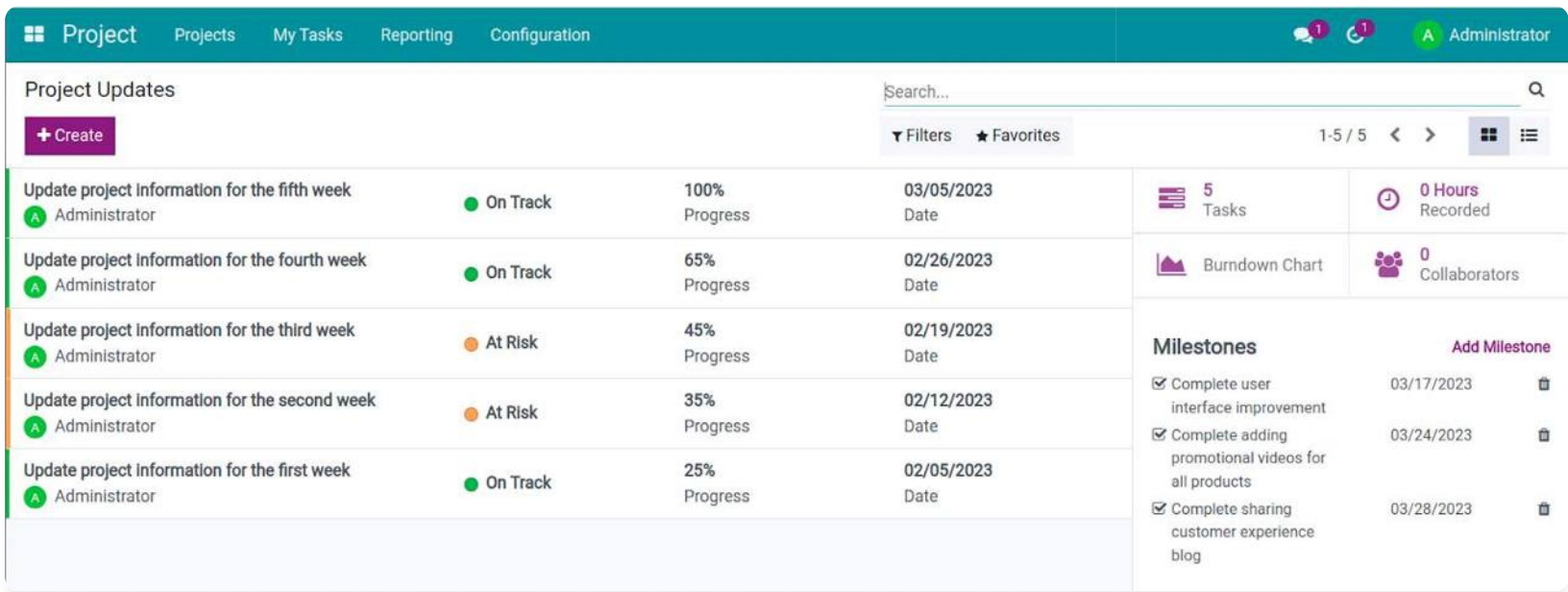


From here, you can update the status and progress of your project. Check off the completed milestones.

PROJECT COMPLETION

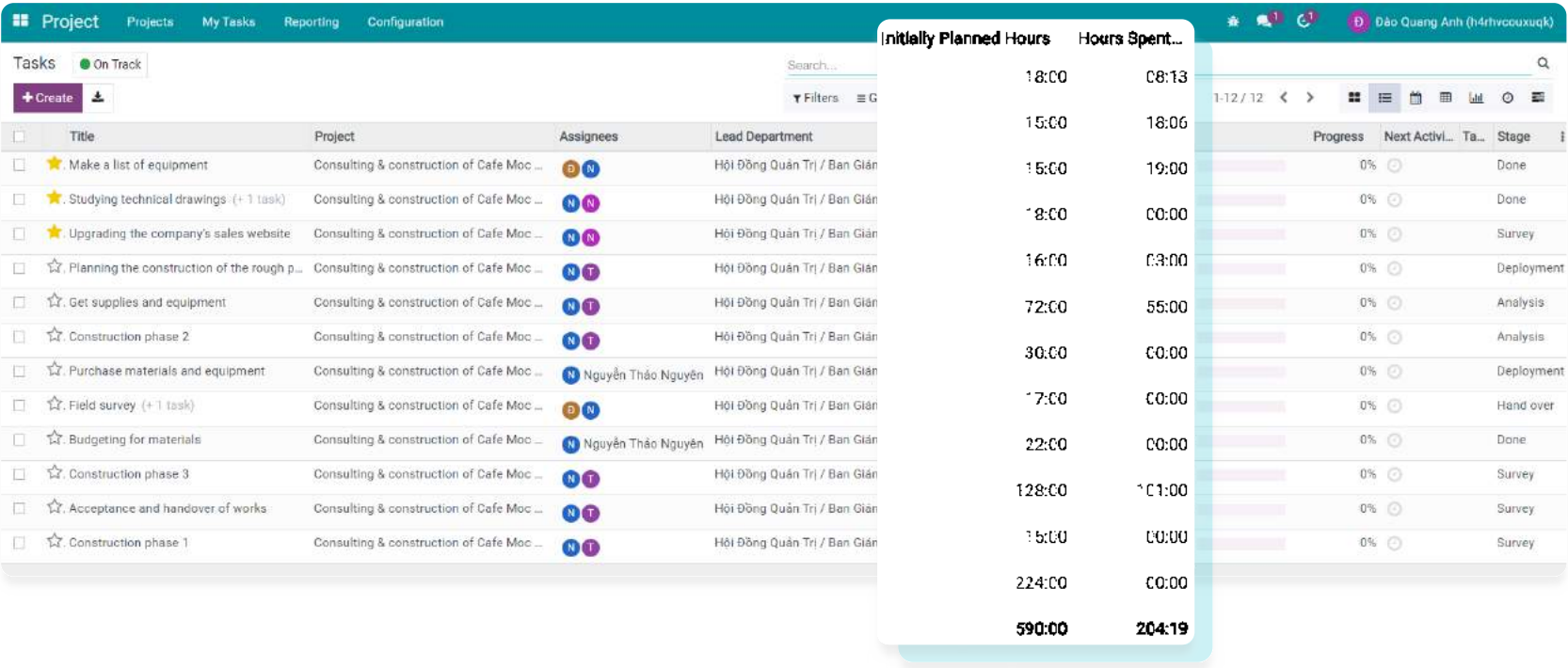
Overall project progress

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.

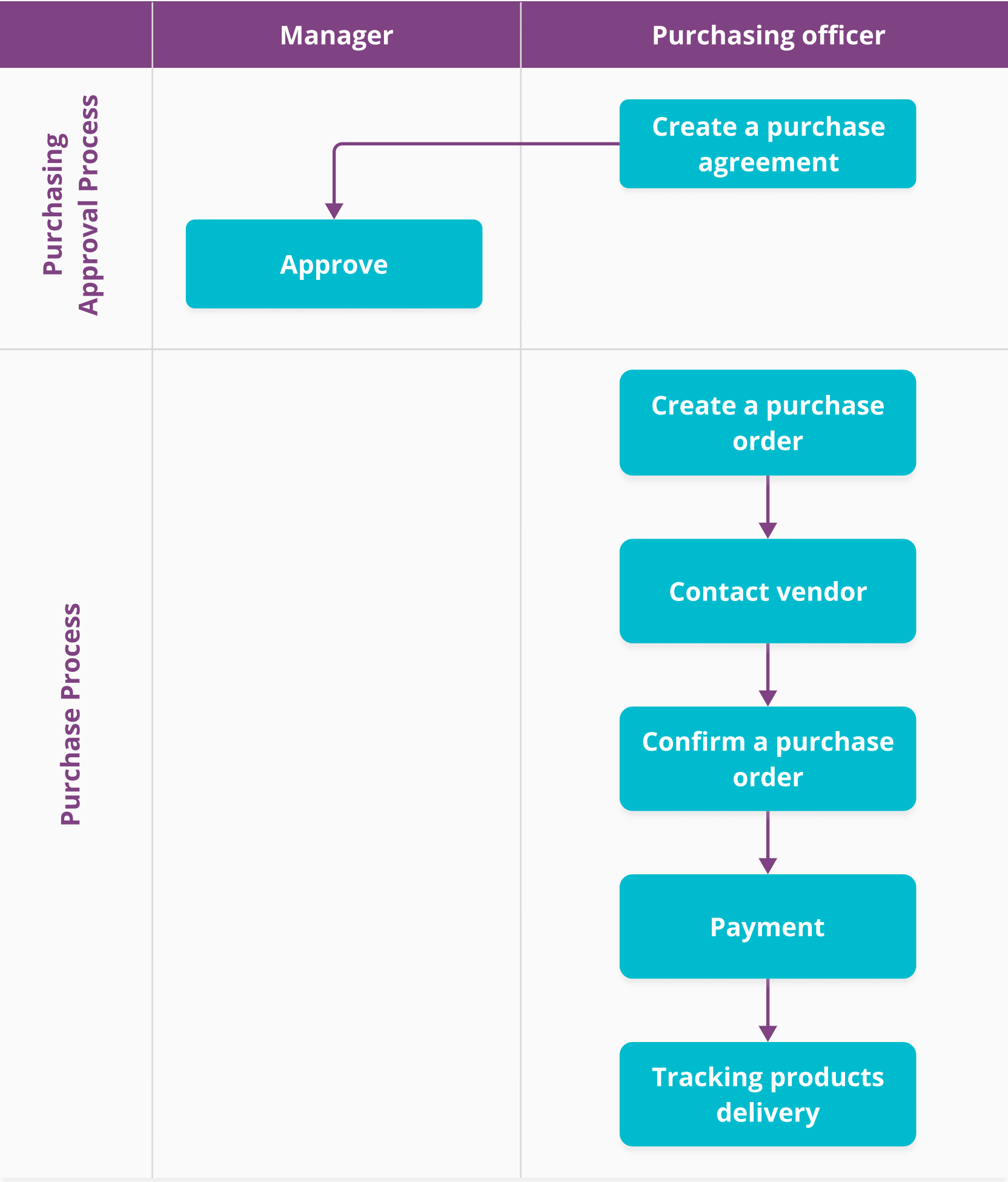


Project revenue and cost

[➔ See details at:](#)

- [Record project revenue.](#)
- [Record project cost.](#)





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

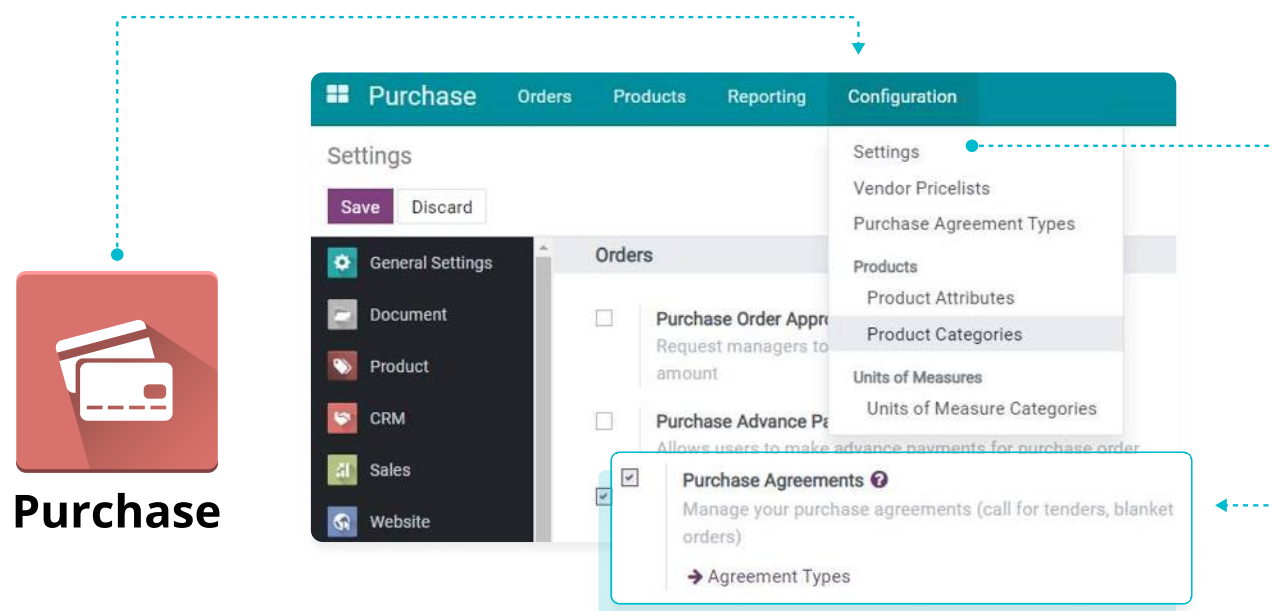


## CREATE A PURCHASE AGREEMENT

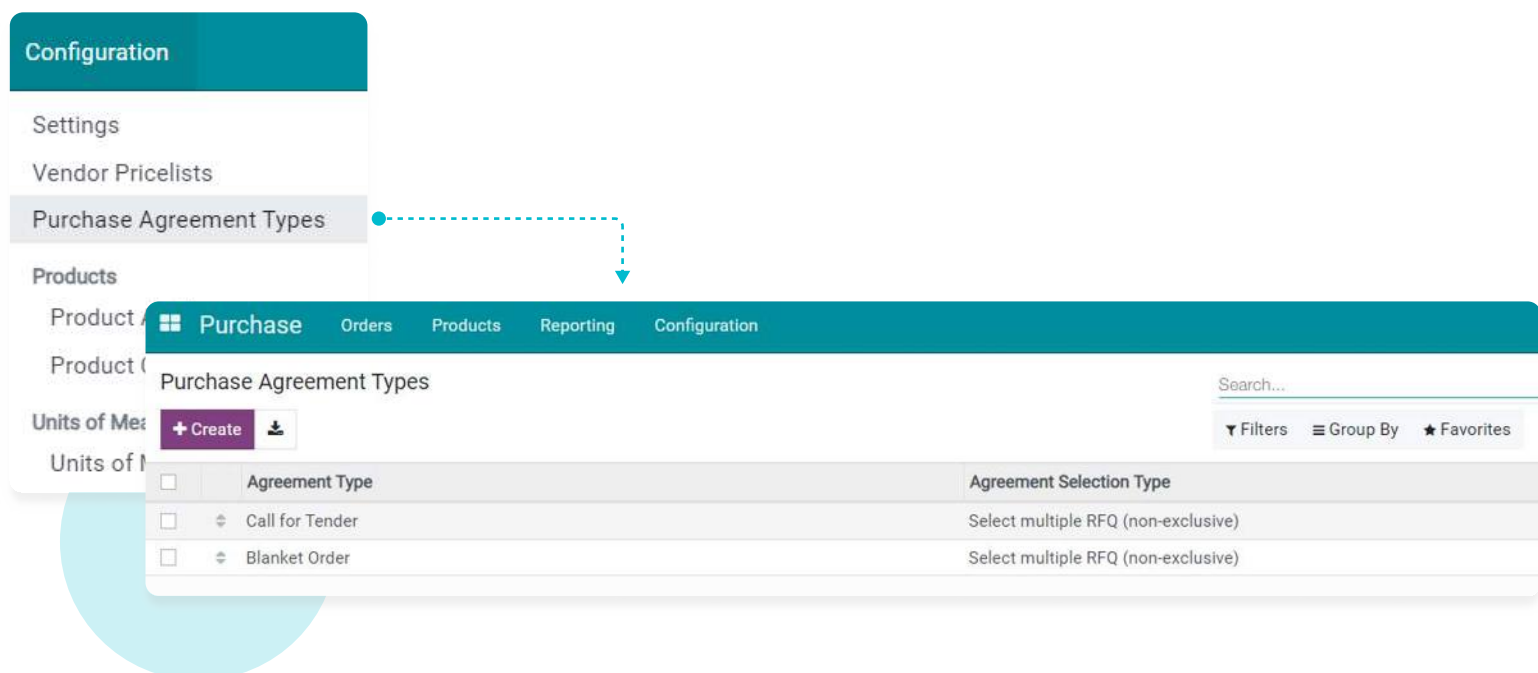
Viindoo software supports users with 2 popular purchase agreements: Call for Tender and Blanket Order. You should select the agreement that fits the procurement process of your business.

### Activate the Purchase Agreements feature

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



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



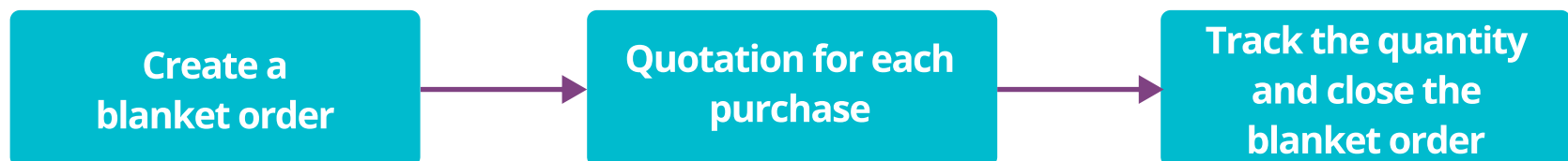
By default, the software provides 2 Purchase agreement types: *Call for Tender* and *Blanket Order*.

➡ See details at:

- [Configure Purchase agreement types.](#)

## Create a blanket order

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



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

Purchase Agreements / New

Reference: New

Purchase Representative: Nguyễn Thảo Nguyễn

Agreement Type: Blanket Order

Vendor: Công ty Cổ phần ST

Agreement Deadline: 04/26/2023 13:42:04

Ordering Date: 04/26/2023

Delivery Date: 04/29/2023

Source Document

Operation Type: Kho Tổng: Internal Transfers

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

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

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

Purchase Agreements / New

Reference: New

Purchase Representative: Nguyễn Thảo Nguyễn

Agreement Type: Blanket Order

Vendor: Công ty Cổ phần ST

Agreement Deadline: 04/26/2023 13:42:04

Ordering Date: 04/26/2023

Delivery Date: 04/29/2023

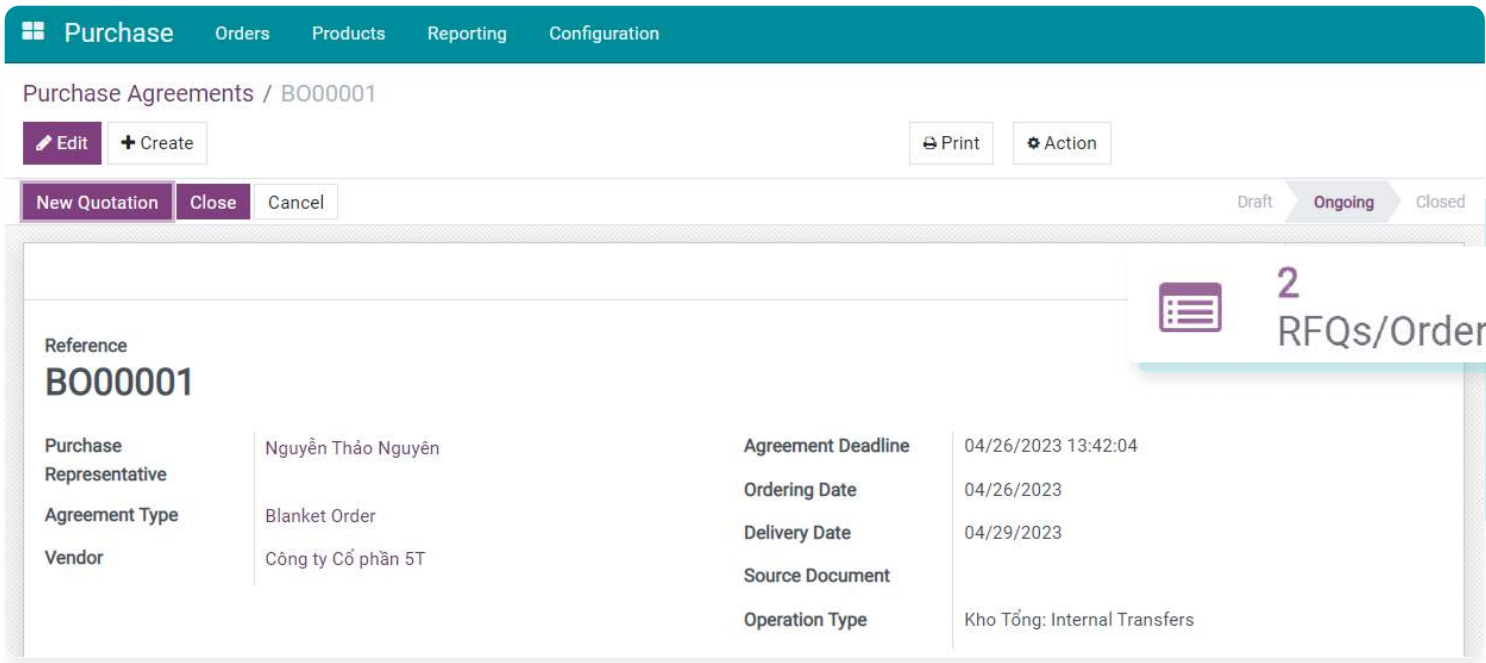
Source Document

Operation Type: Kho Tổng: Internal Transfers

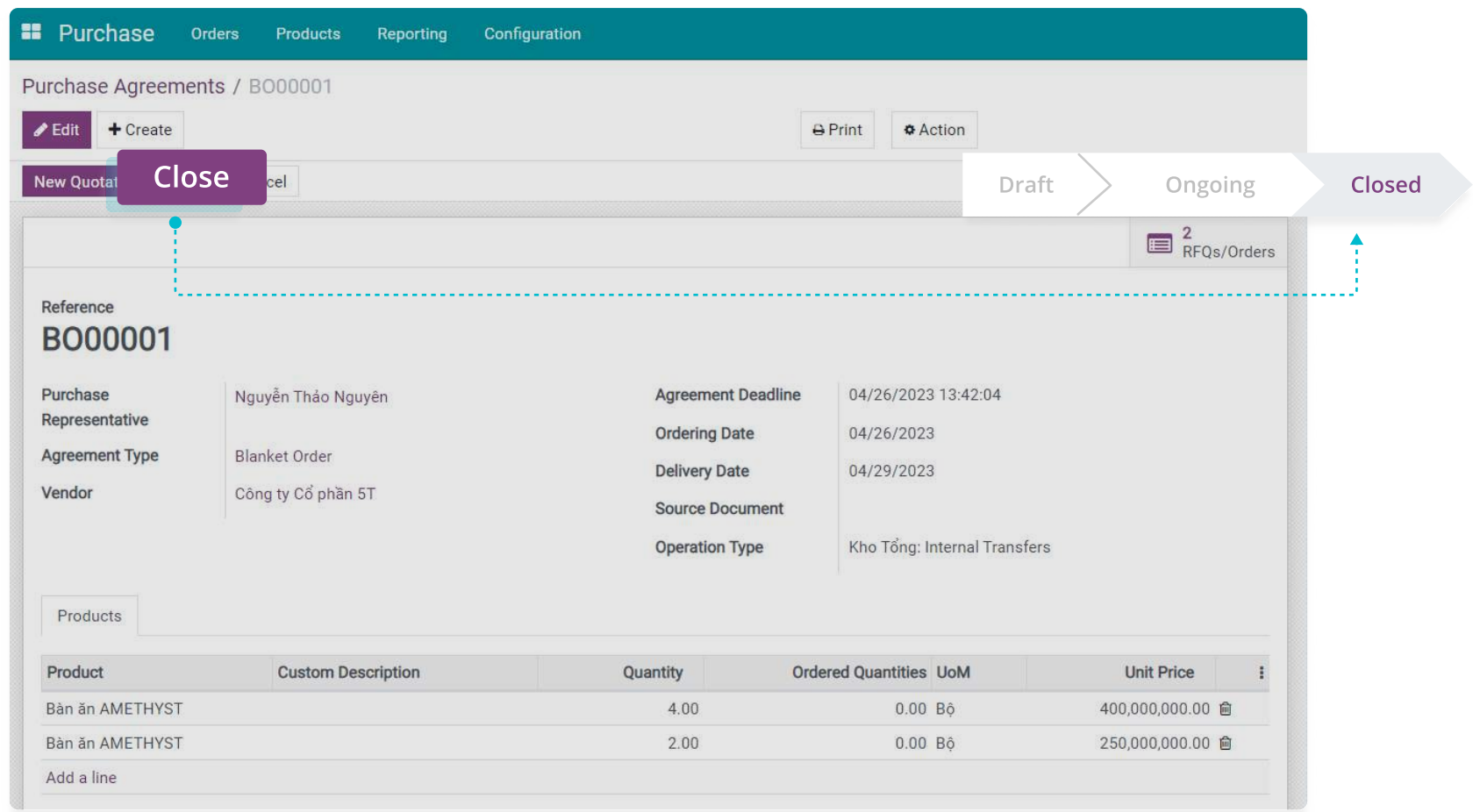
From the Blanket order, you can create multiple Requests for quotation at different times and quantities. You click **New Quotation** to create a new Request for quotation.

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

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



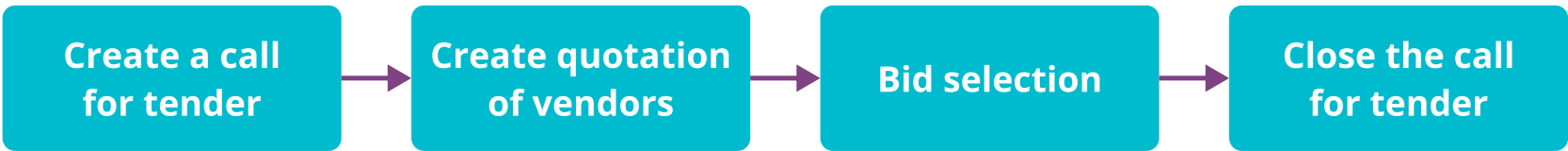
When the validity period has expired and the vendor has delivered the full amount of the Blanket order, you press **Close** to complete.



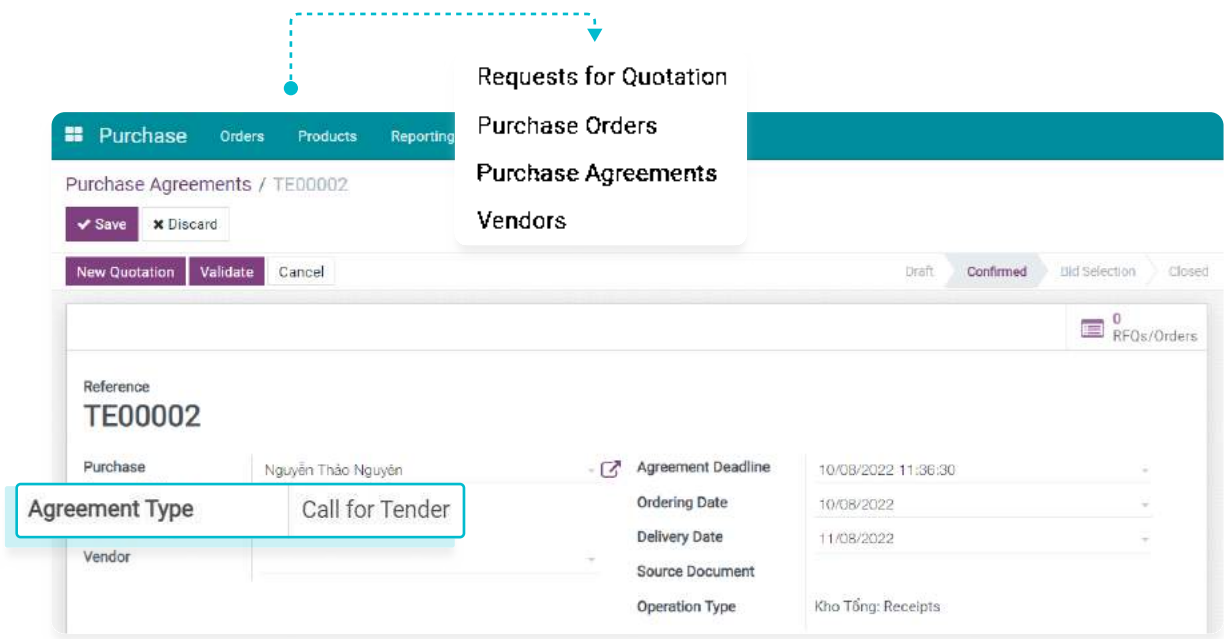


Create a call for tender

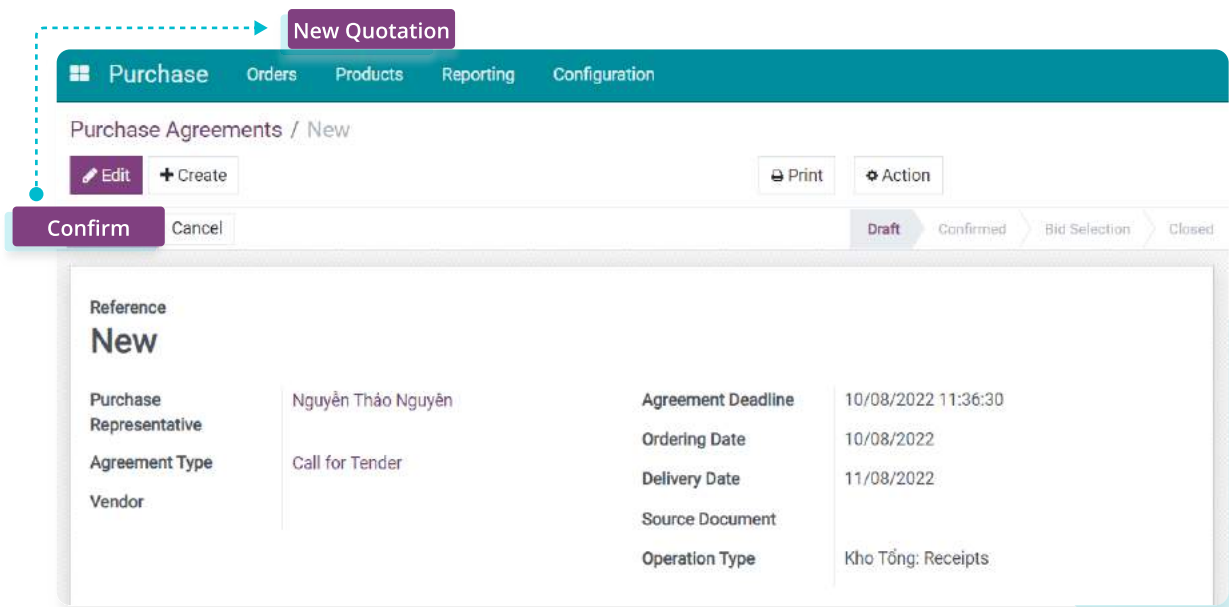
When businesses want to refer prices from many different vendors to choose the vendor with the reasonable price, they can use the Call for tender feature. The call for tender process is shown in the diagram below:



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

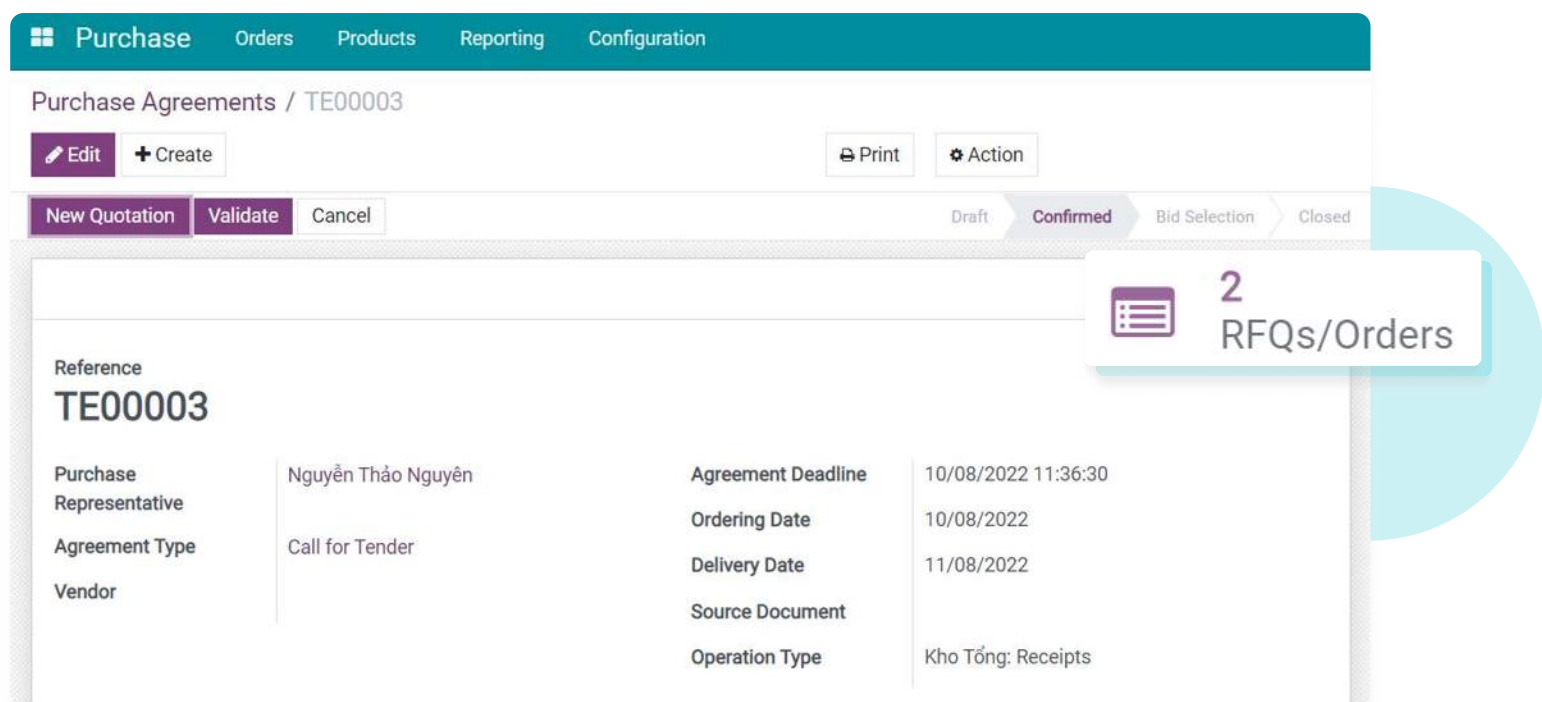


When the information of the purchase agreements is filled in, press **Confirm**.

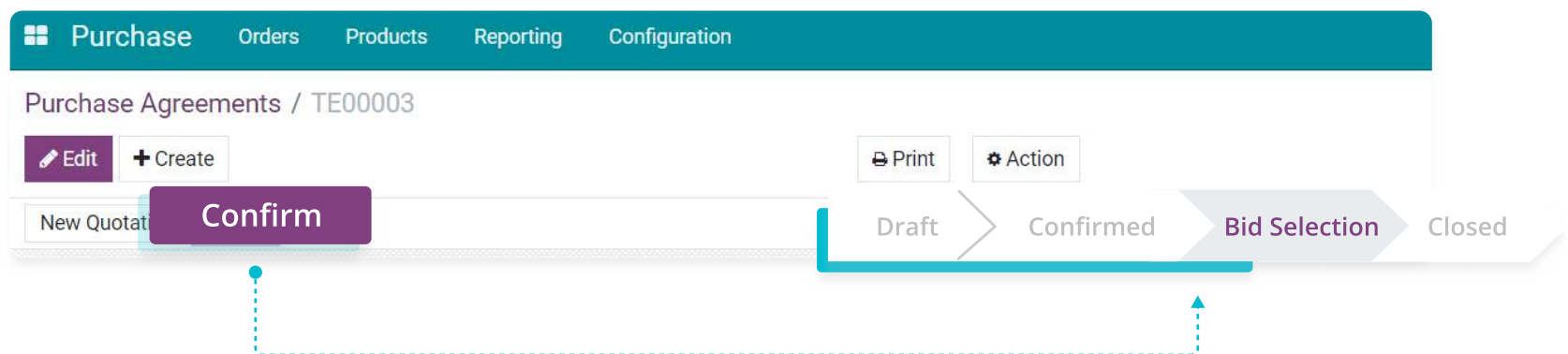


Create requests for quotation and send them to different vendors by pressing **New Quotation**:

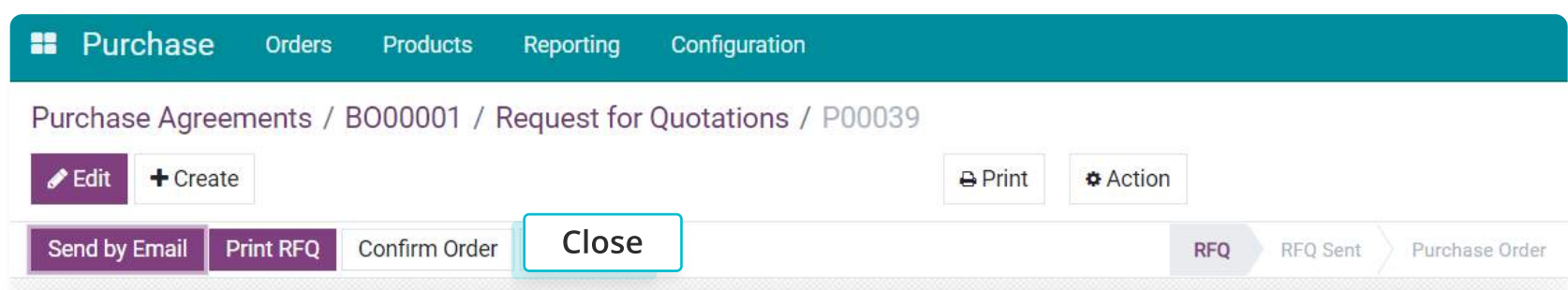
The product information on the Purchase agreements will be automatically filled in the Request for quotation. You will fill in the appropriate tender vendor information. You can see the number of Requests for quotation or Purchase orders attached to this Call for tender.



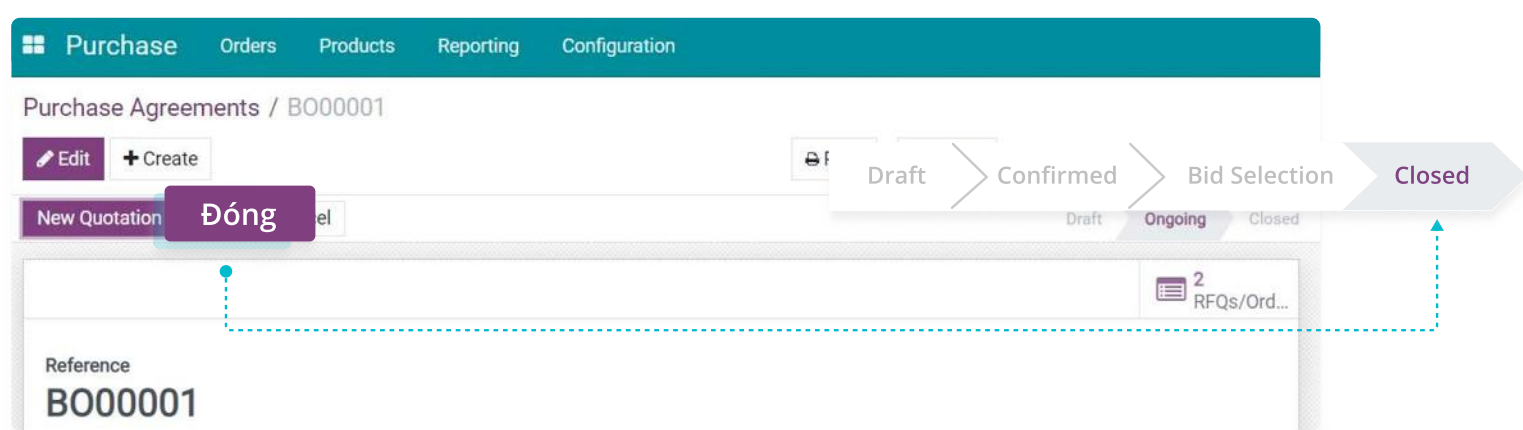
After selecting the appropriate vendors, you choose **Validate** to move to the **Bid Selection** state.



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



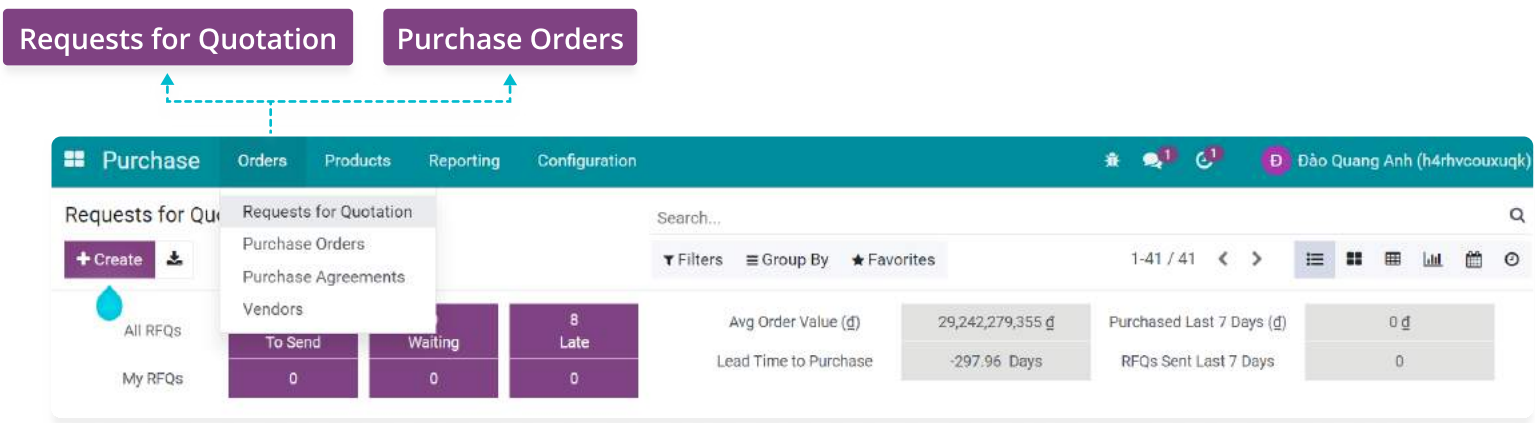
You press **Close** to end the Bidding.



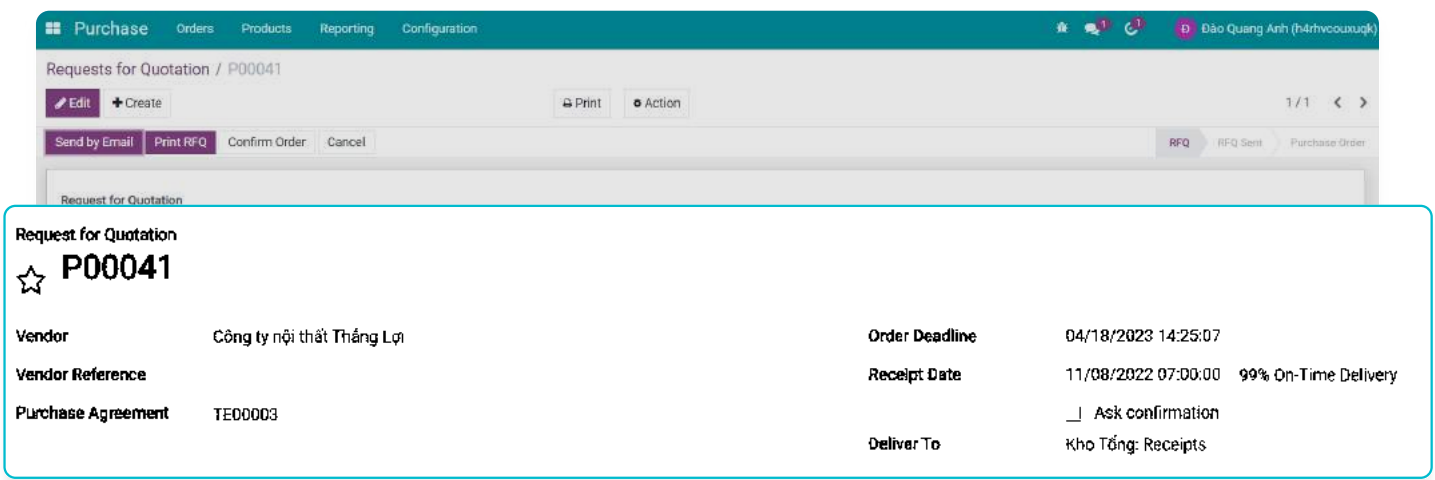
## CREATE A PURCHASE ORDER

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

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

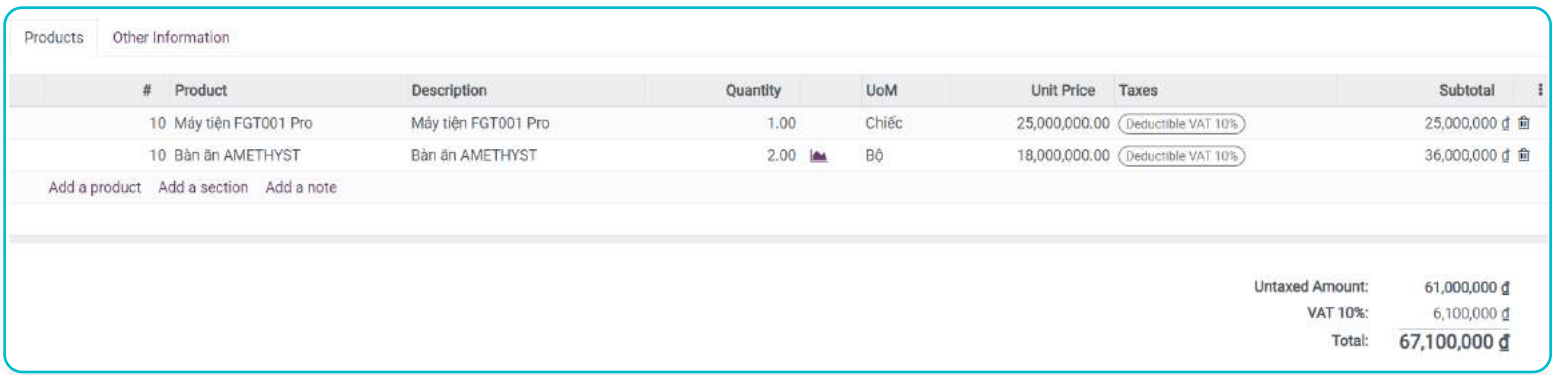


On the **Requests for Quotation** or **Purchase Orders** view, add the following information:



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

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

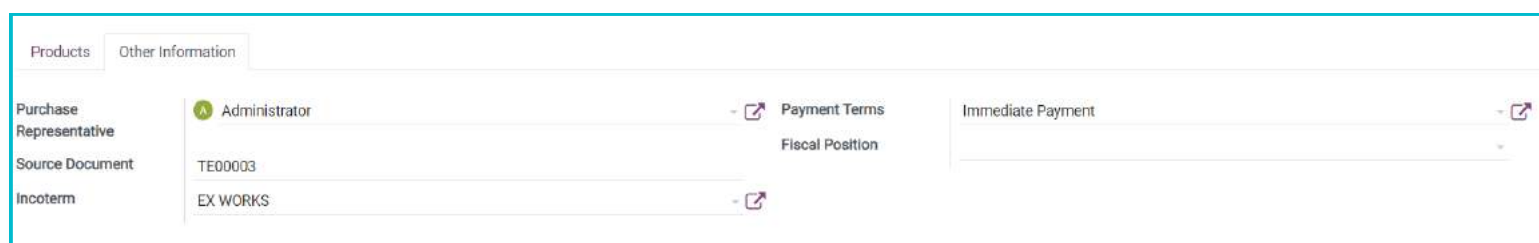




Press **Add a product** and fill in the information related to the product you want to buy as follows:

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

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



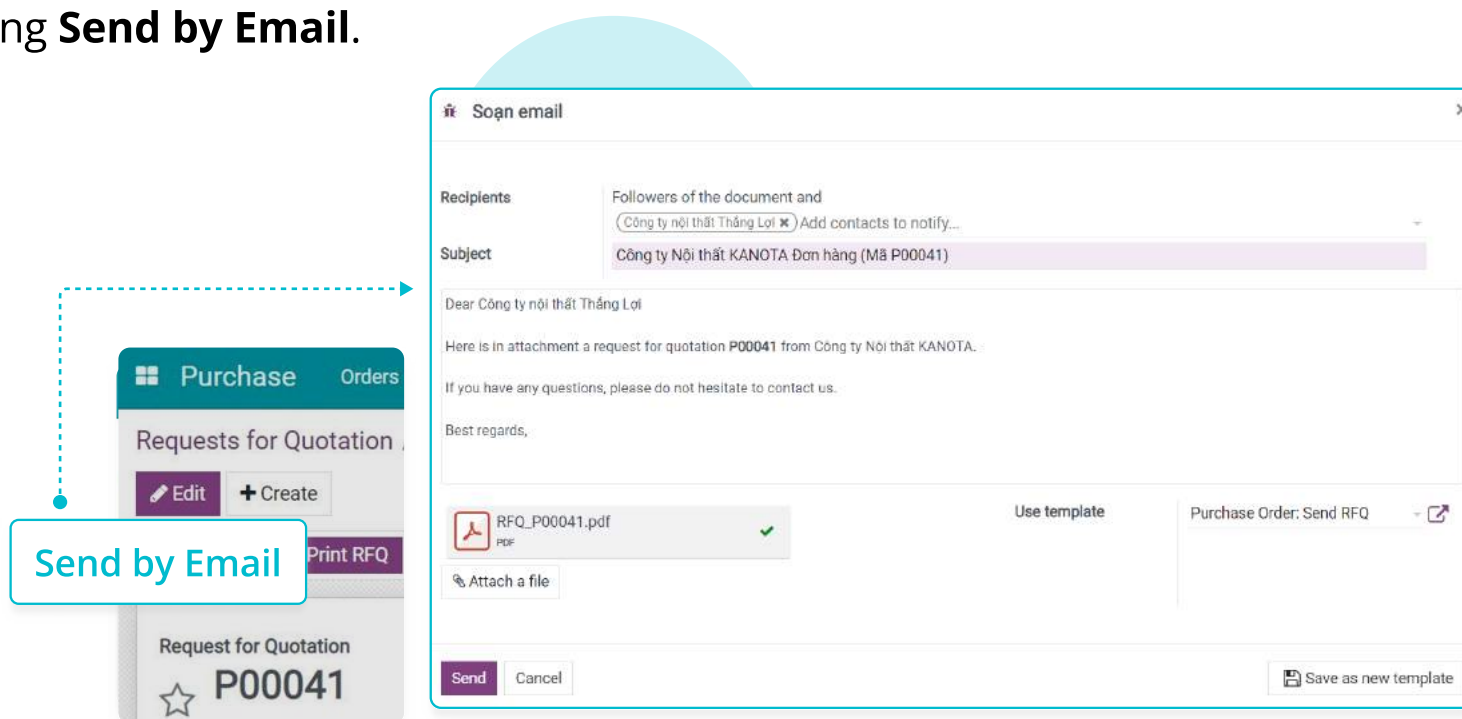
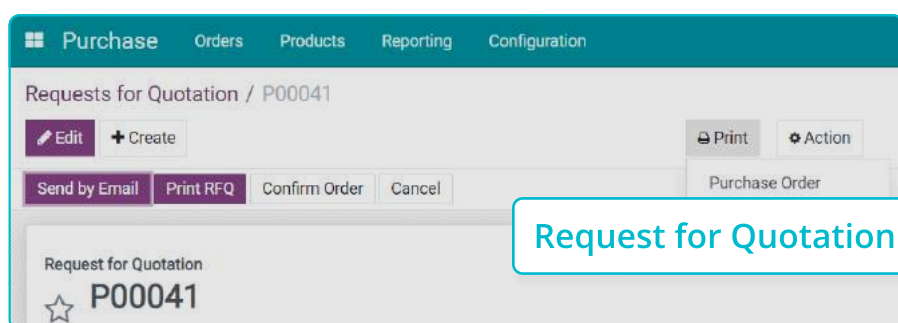
- *Purchase Representative*: The user who created this request for quotation will be displayed by default but you can select another person in charge.
- *Payment Terms*: Select the payment term that applies to the purchase order.

Press **Save** to save the information.

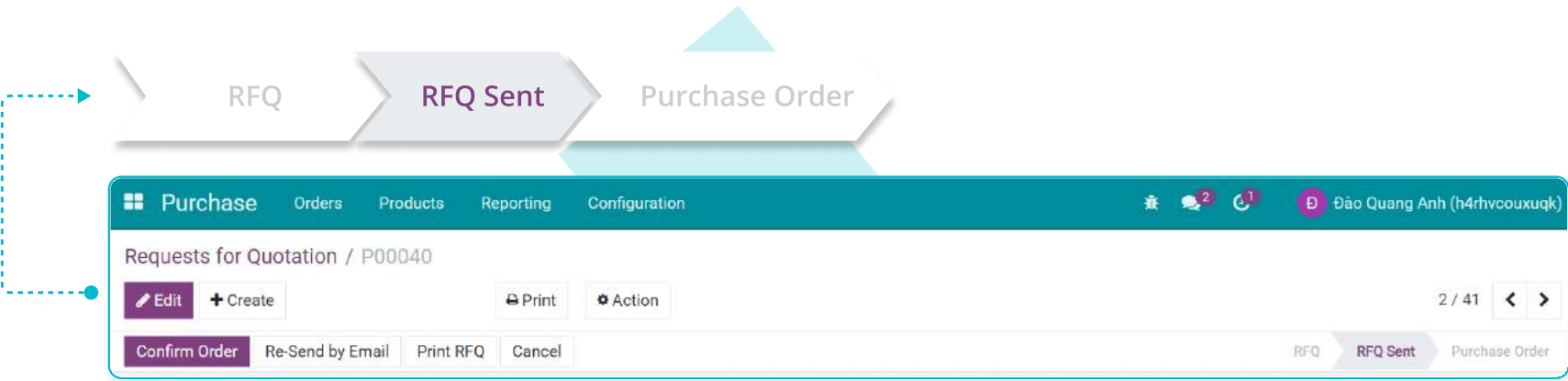
## CONTACT VENDOR

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

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

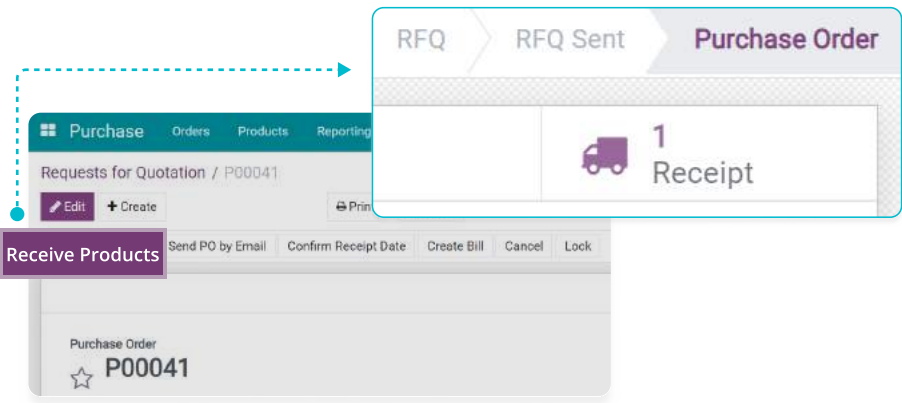


The Request for Quotation in PDF format will be automatically attached to the email, edit the email content if necessary and press **Send**. Once done, the **Request for Quotation** status will be changed to *RFQ Sent*.



CONFIRM A PURCHASE ORDER

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



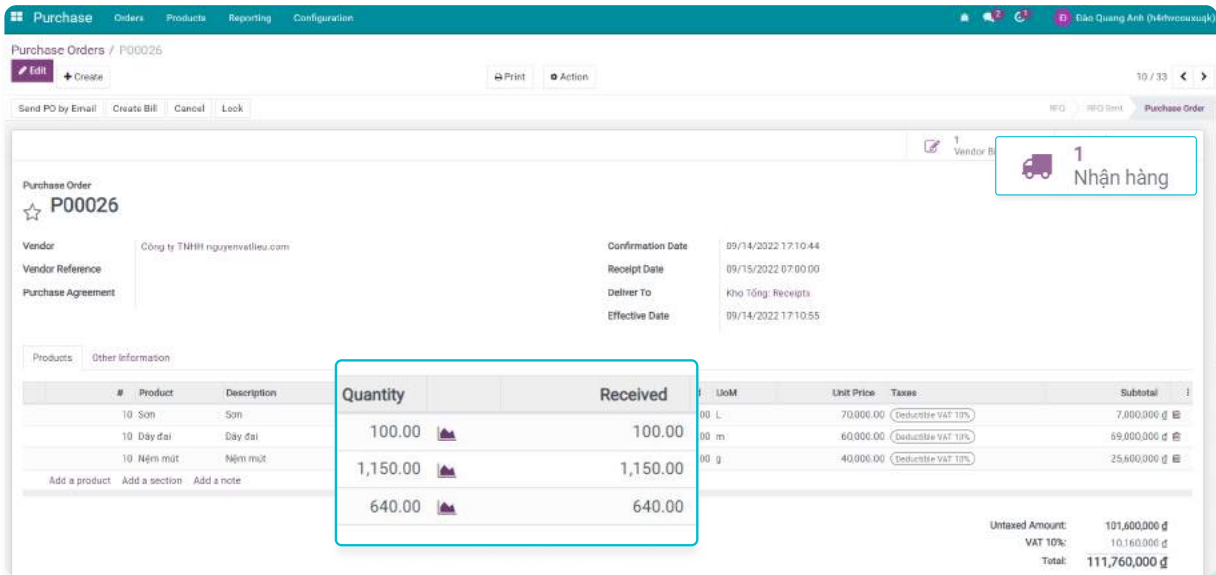
PAYMENT

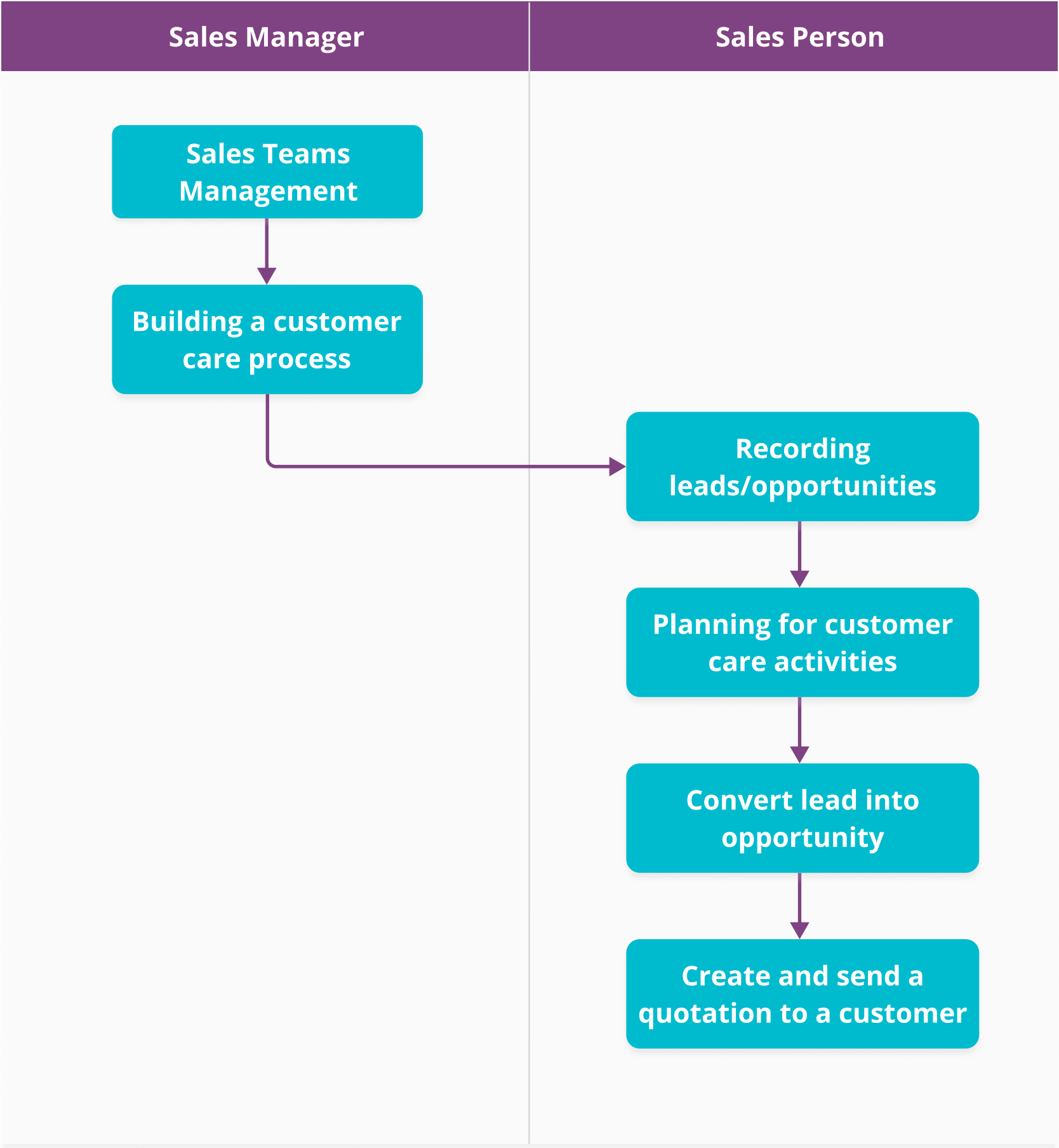
- ➡ See details at:
  - Account Payables.

TRACKING PRODUCTS DELIVERY

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

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



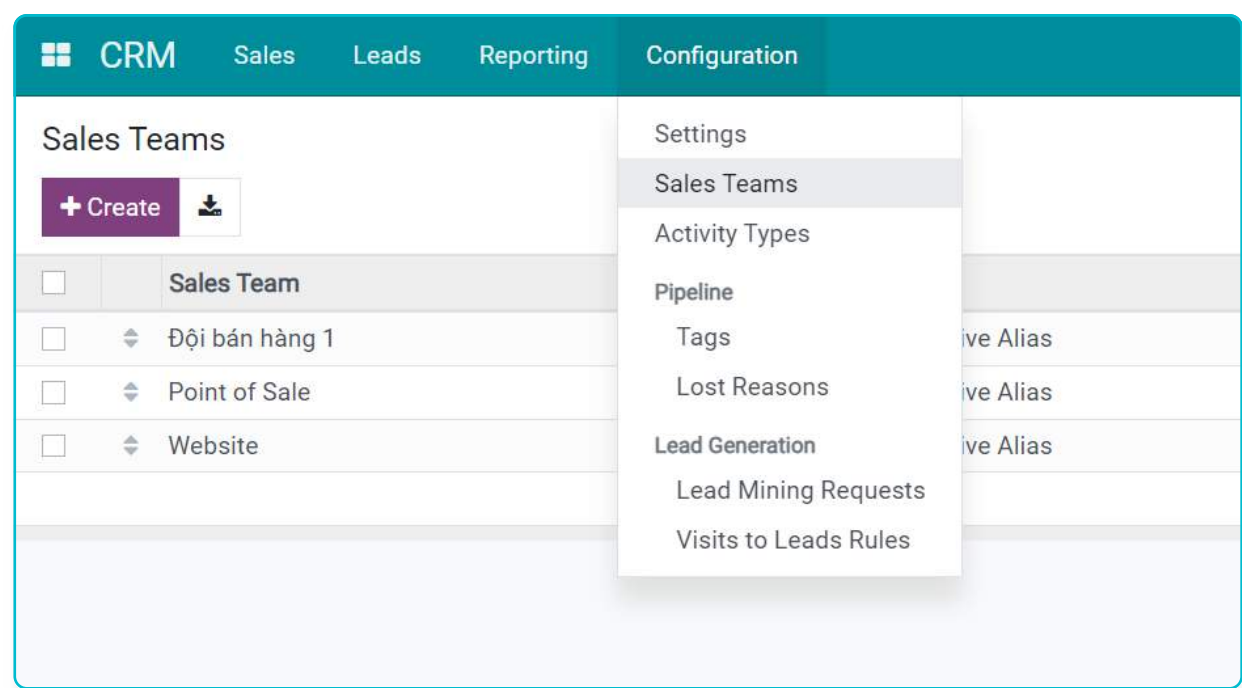




## SALES TEAMS MANAGEMENT

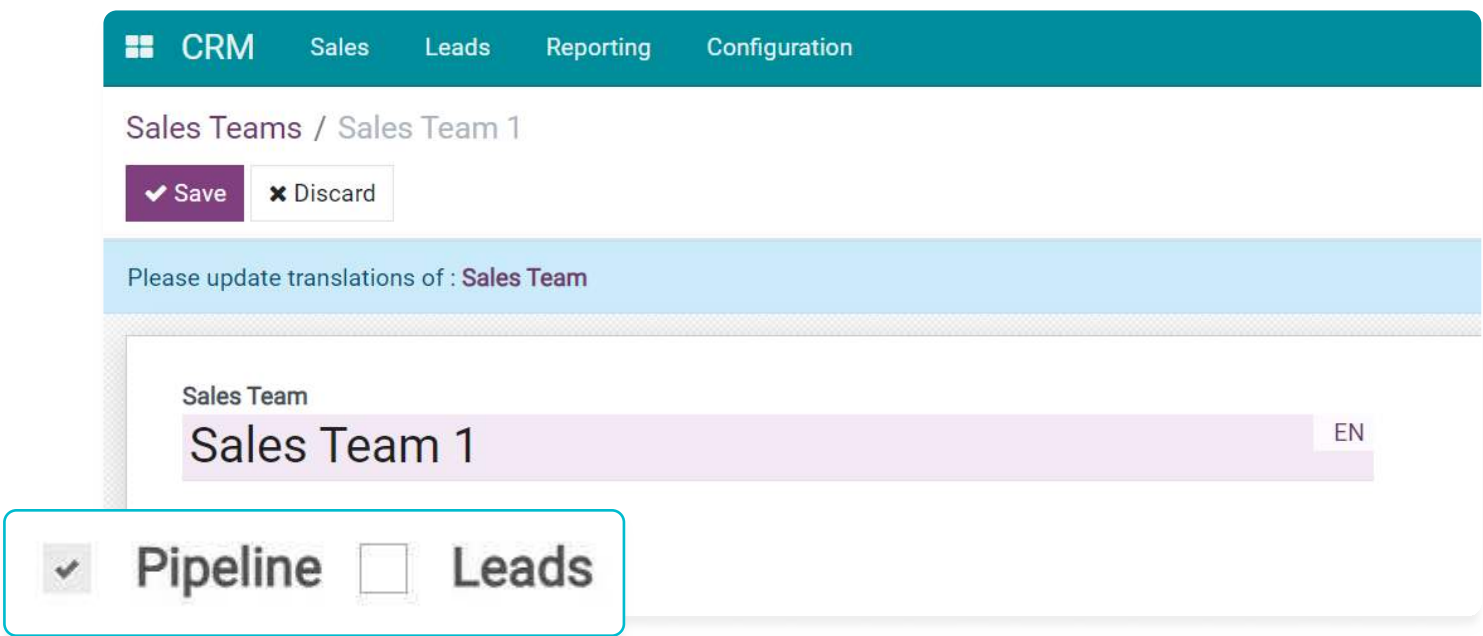
Managing sales teams will help businesses efficiently identify sales resources, optimize sales targets by channel, and potential customer groups of the company.

To create a new sales team, navigate to **CRM ▸ Configuration ▸ Sales Team ▸ Create** then add detailed information about your **Sales Teams**.

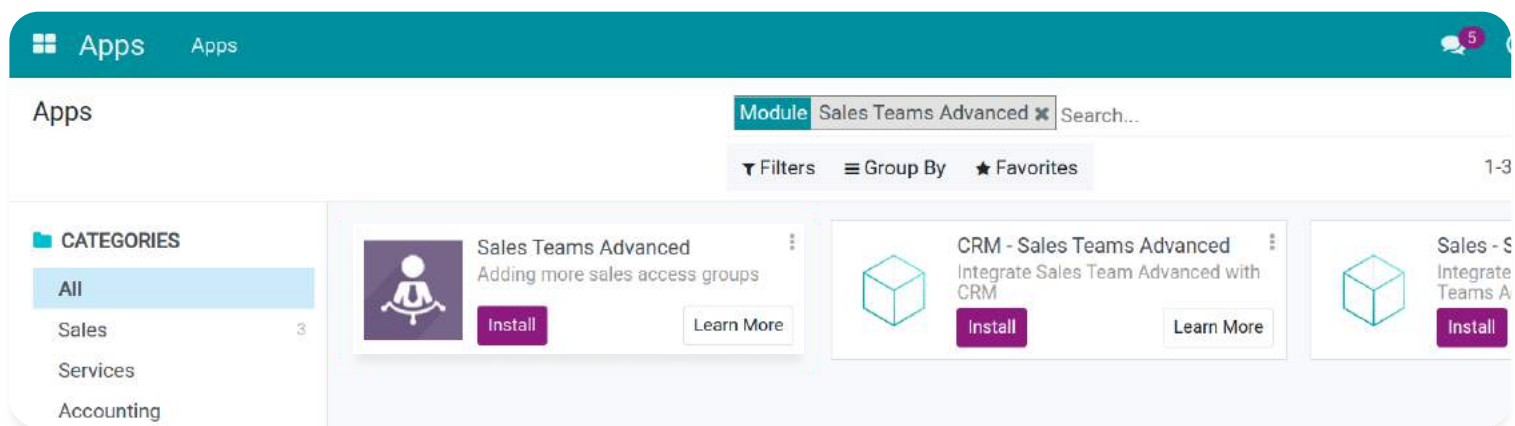


- ➡ See details at:
- *Setting up a Sales Team.*

Click on **Opportunities** or **Leads** to view the sales team on the Team **Kanban view**. You can navigate to **CRM ▸ Sales ▸ Teams** to check information, track the customer care situation of each team.



To apply flexible rights to the sales team, **users with System setup rights (Admin rights)** need to install the **Advanced Sales Team** app. Access the **Apps** module, search for the **Advanced Sales Team** keyword, and press **Install**.



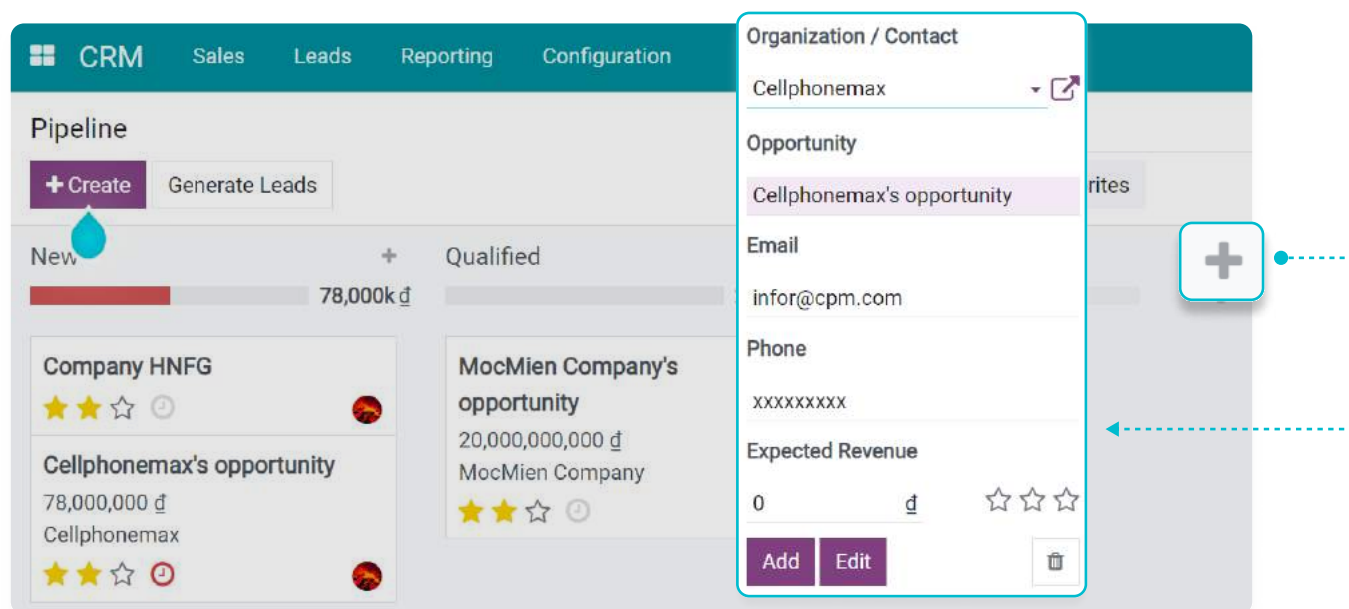
- ➔ See details at:
- [\*Advanced Sales Team\*](#).

## BUILDING A CUSTOMER RELATIONSHIP MANAGEMENT (CRM) PROCESS

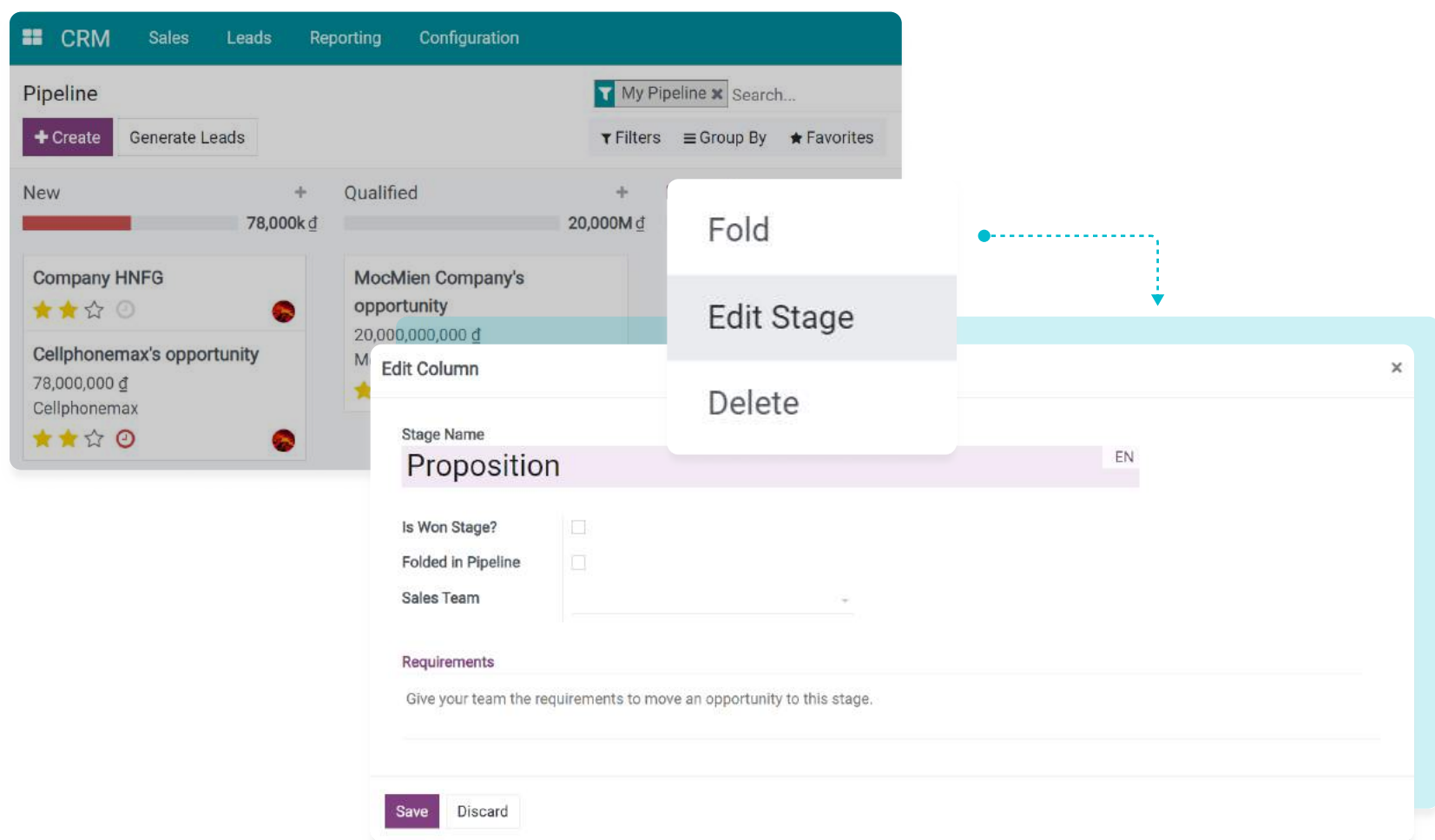
You can build a customer care process for the entire company or apply it specifically to each sales team depending on the actual process.

### Customer care process for the entire company

To build a customer care process, go to the **CRM** app. On the [Kanban Opportunity](#) overview interface, click on the “+” button to add a new stage.



Add the name of the stage and click **Add** to complete. Then, you can set up additional information for this stage by selecting the settings icon on the stage and choosing **Edit Stage**.

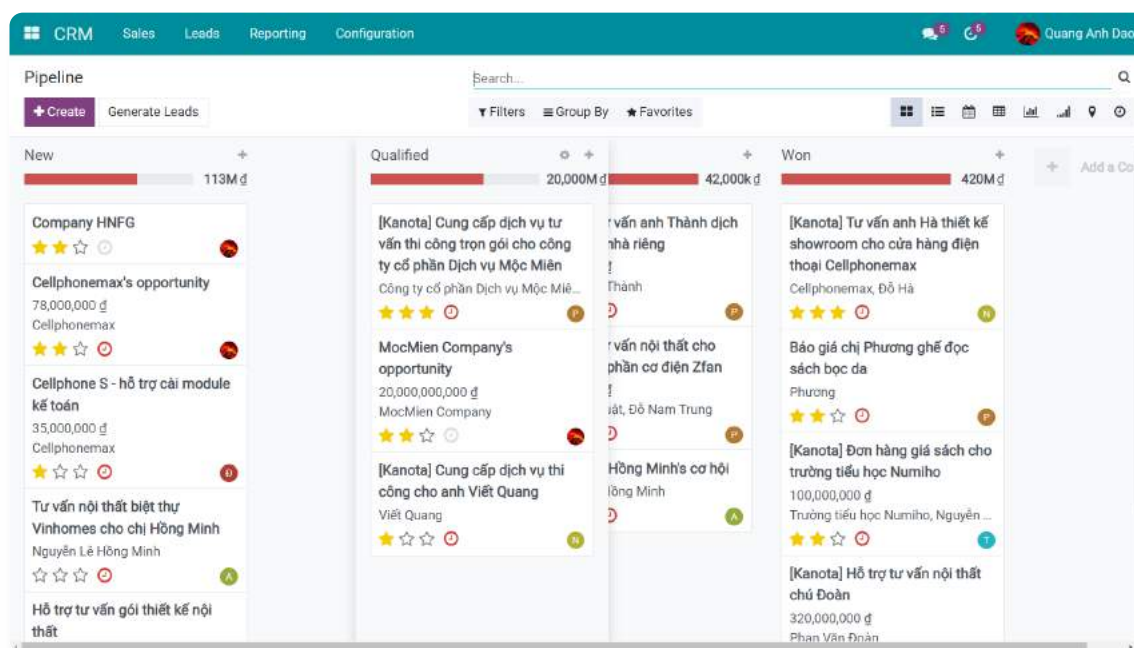


On this interface, you can customize the following information:

- *Stage Name*: The name of this stage.
- *Is Won Stage?*: If selected, when an opportunity is moved to this stage, it will be automatically marked as **Won**.
- *Folded in Pipeline*: If selected, this stage will be closed by default when users access the lead interface, making the interface look neat and focused on other important stages.
- *Sales Team*: To apply the process to the entire company, leave this field blank.
- *Requirements*: You can add more details about the requirements to move a lead to this stage.

After filling in the information, click the **Save** button to save the changes.

You can also rearrange the stages by dragging and dropping them on the Kanban view.





## Customer care process for a sales team

In case your business has multiple sales teams and each team has a different customer care process, you will need to create stages for each specific sales team. Go to the **Edit Column** view and follow the similar steps as [building a customer care process for the entire company \(Page 68\)](#).

The screenshot shows a CRM interface with a teal header bar containing 'CRM', 'Sales', 'Leads', 'Reporting', and 'Configuration'. Below the header, the breadcrumb 'Pipeline / Cellphonemax's opportunity' is visible. The main form area has a title bar with 'Save' and 'Discard' buttons. Below this are tabs for 'New Quotation', 'Won', 'Lost', and 'Enrich'. The form content includes a 'Meeting' icon with '0' next to it. The main section is titled 'Opportunity' and contains the text 'Cellphonemax's opportunity'. Below this, there are fields for 'Expected Revenue' (78,000,000), 'Probability' (91.67%), 'Customer' (Cellphonemax), 'Email' (infor@cpm.com), 'Phone' (xxxxxxx), and 'Salesperson' (Quang Anh Dao). There are also fields for 'Expected Closing', 'Priority', and 'Tags'. At the bottom, there is a 'Sales Team' dropdown menu and a 'Point of Sale' button.

At the **Sales Team** section, select the sales team that needs this stage and click **Save** to complete.

Once the configuration is done, members of this sales team will see the stages shared across the company as well as the stages created specifically for them. Members of other sales teams will not see this stage.

## RECORDING LEADS/OPPORTUNITIES

In case your company needs a valuation step before recording an opportunity, you can use the **Lead** feature. Activate this feature by navigating to **CRM ► Configuration ► Settings**, enable the Lead option, and then click **Save**. With this feature enabled, you can manage your business leads, evaluate and nurture them before [converting them into Opportunities \(Page 72\)](#) to quote.

You can directly record a lead in the software by navigating to **CRM ► Leads**, and clicking the **Create** button.

On the lead detail, there is basic information such as the actual needs, contact information of the customer, v.v. From here, the salesperson can evaluate the **Priority** level and add suitable **Tags** to each lead for the categorization in the future.

The screenshot displays the 'Lead / New' form in the Viindoo CRM. The form is titled 'Lead AHGY Company' and shows a probability of 86.14%. It includes fields for Company Name, Business Type, Employee Size, Address, Website, Language, Salesperson, and Sales Team. There are also fields for Contact Name, Email, Job Position, Phone, and Mobile. The form is divided into sections: 'Internal Notes', 'Extra Info', 'Tracking', 'Campaign', 'Medium', 'Source', and 'Referred By'. The 'Tracking' section shows 'Job Campaign', 'Email', and 'Facebook'. The 'Campaign' section shows 'Medium'. The 'Source' section shows 'Facebook'. The 'Referred By' section shows 'Đội bán hàng 1'. The 'Assignment Date' is 07/03/2023 00:38:13. The 'Closed Date' is empty. The 'Priority' is set to 'Medium'. The 'Tags' section is empty. The form is annotated with a blue dashed line and a blue arrow pointing to the 'Create' button, and a blue dashed line and a blue arrow pointing to the 'Priority' and 'Tags' fields.

It's possible to attach information related to marketing **Campaigns**, lead **Sources**, or **Medium**, etc. for analysis purposes.

➡ See details at:

- [Steps to record Leads on Viindoo software.](#)

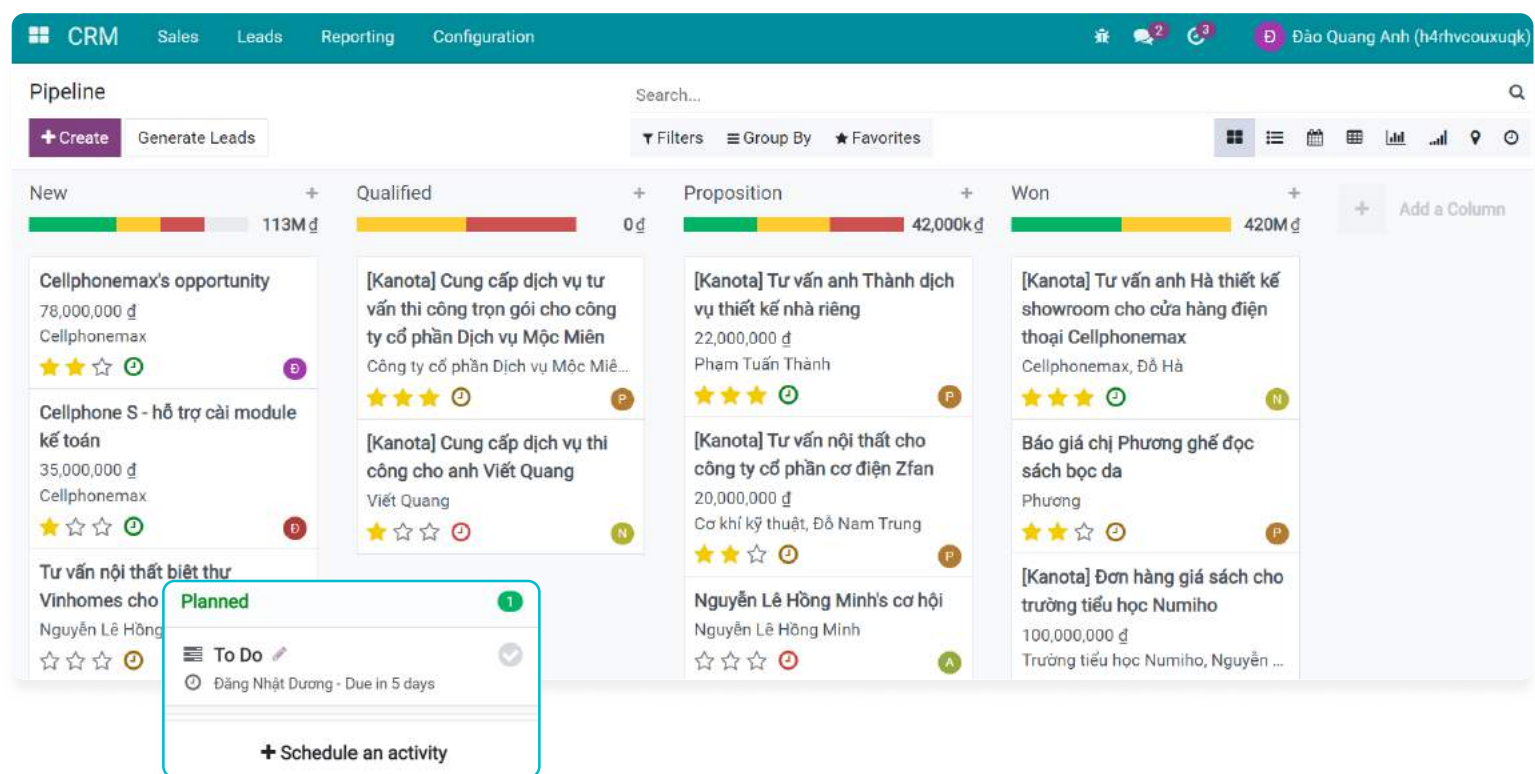
In addition, Viindoo supports auto-generating leads to help you increase data entry for your sales funnel, have more leads, as well as sales opportunities for your business. Opportunities can be automatically generated from the following sources:

- [Incoming email sent from your customer;](#)
- [Website contact page;](#)
- [LiveChat.](#)

## PLANNING FOR CUSTOMER CARE ACTIVITIES

After recording leads, you can plan customer care with the [Schedule Activity \(Page 38\)](#) feature. Or click on the clock icon right on the [Kanban view](#) of a lead to schedule an activity in the customer care plan. The color of the clock icon will tell you the status of the scheduled activity:

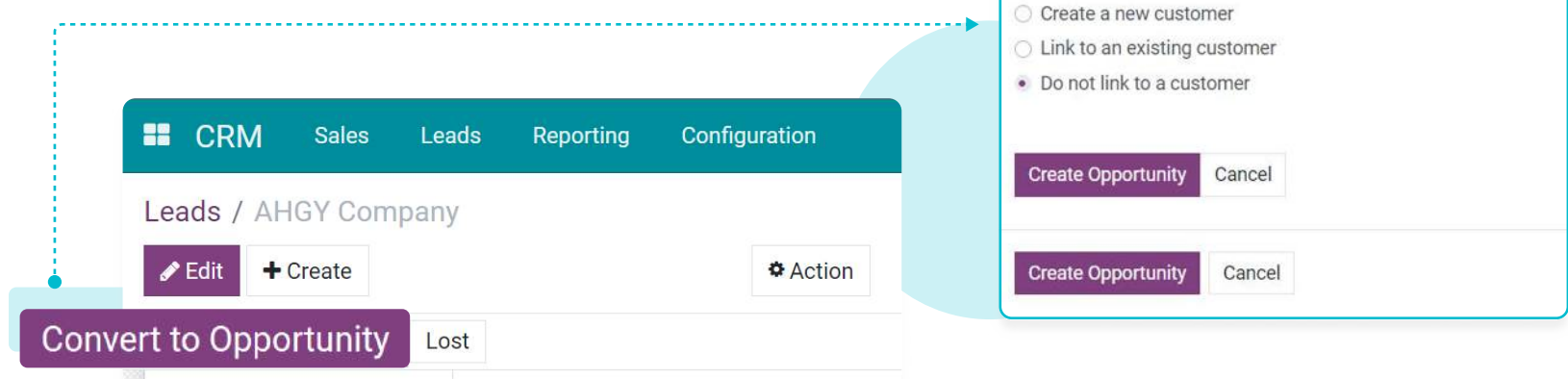
- *Green:* Activity in the future.
- *Yellow:* Activity on the current day.
- *Red:* Overdue activity.



## CONVERT A LEAD TO AN OPPORTUNITY

In the customer care process, if you realize this lead has a high probability of success, you convert the lead into an opportunity and assign it to the salesperson in charge. On the lead view, press the **Convert to Opportunity** button.

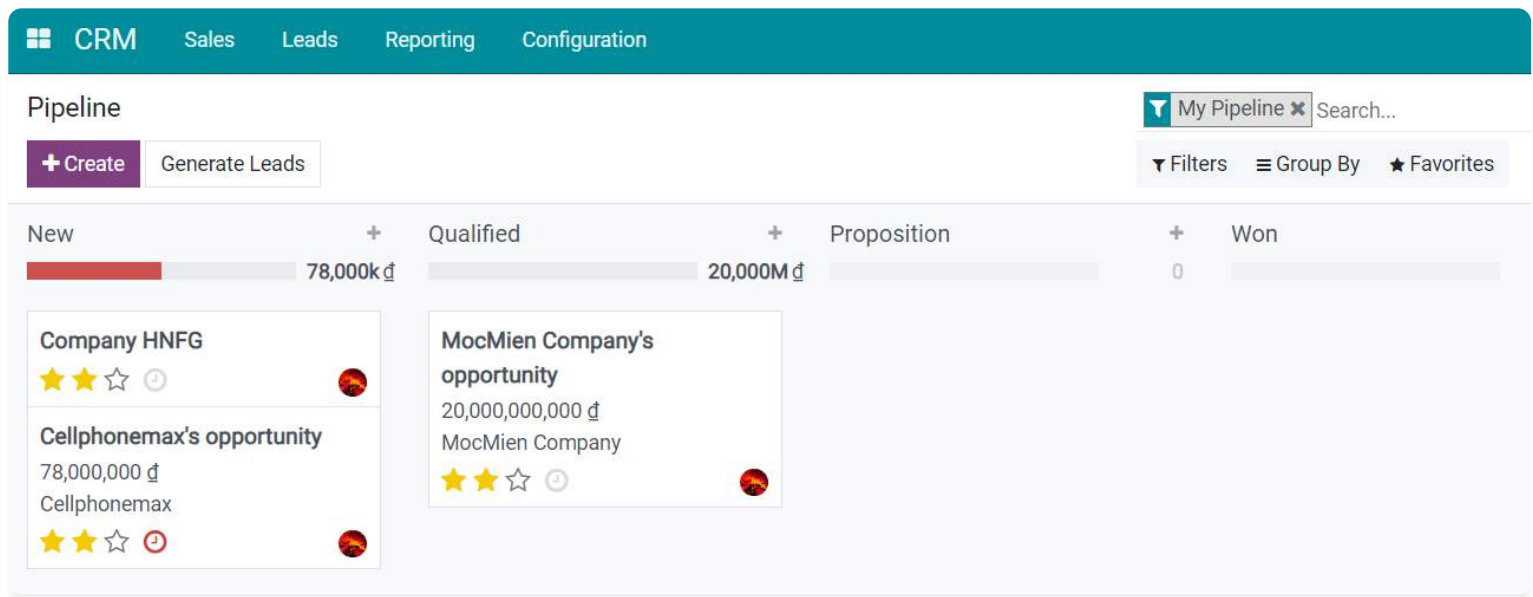
A window will be popped-up with the following information:





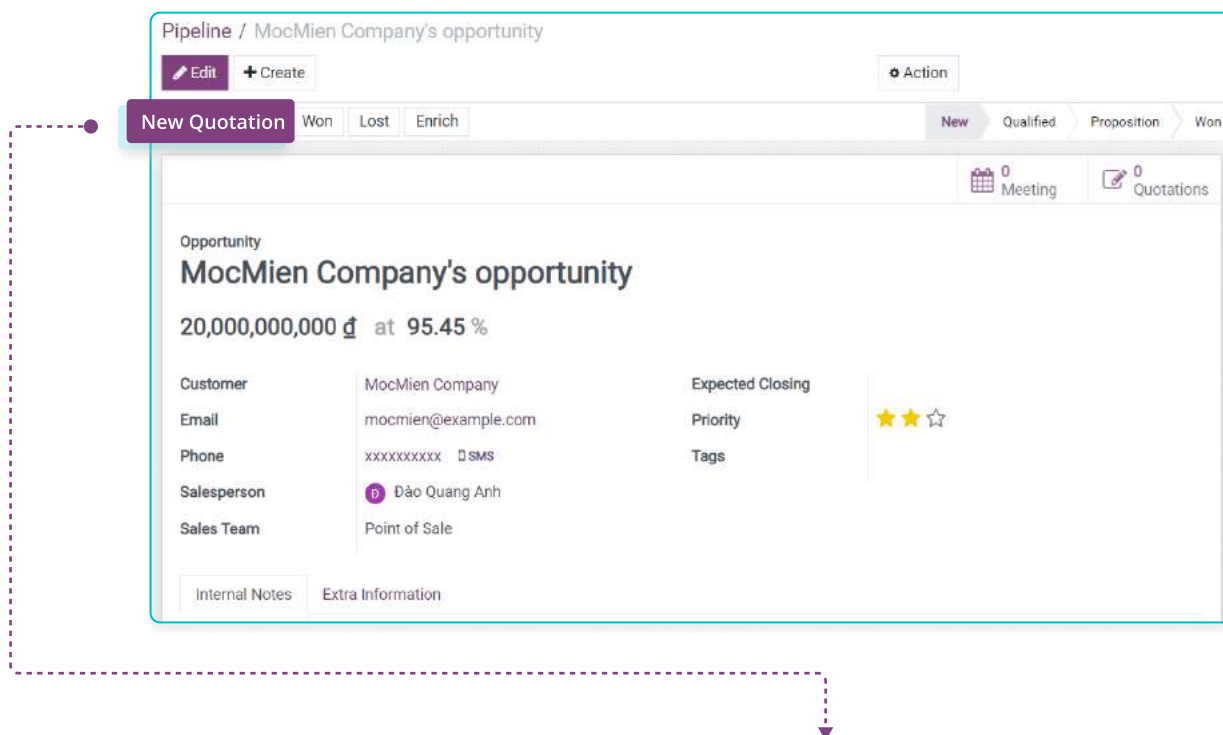
On the **Conversion Action**, click on **Convert to opportunity**. Besides, you can also decide next actions to take care of this sales opportunity. For example, assign this sales opportunity to a certain salesperson or a dedicated sales team, create a new customer or link this opportunity with an existing customer, etc.

To view leads that have been converted into opportunities, navigate to **CRM ▶ Sales ▶ My Pipeline**.

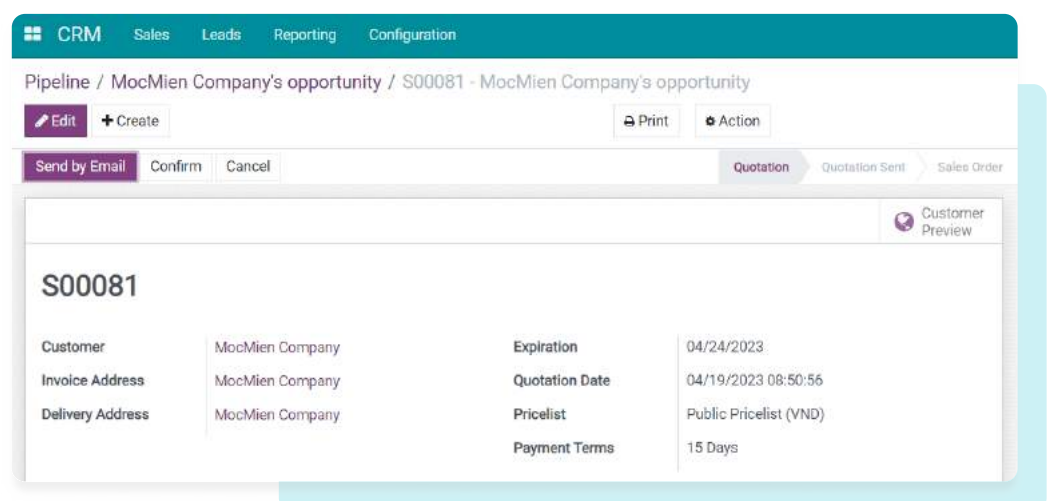


## CREATE AND SEND A QUOTATION TO A CUSTOMER

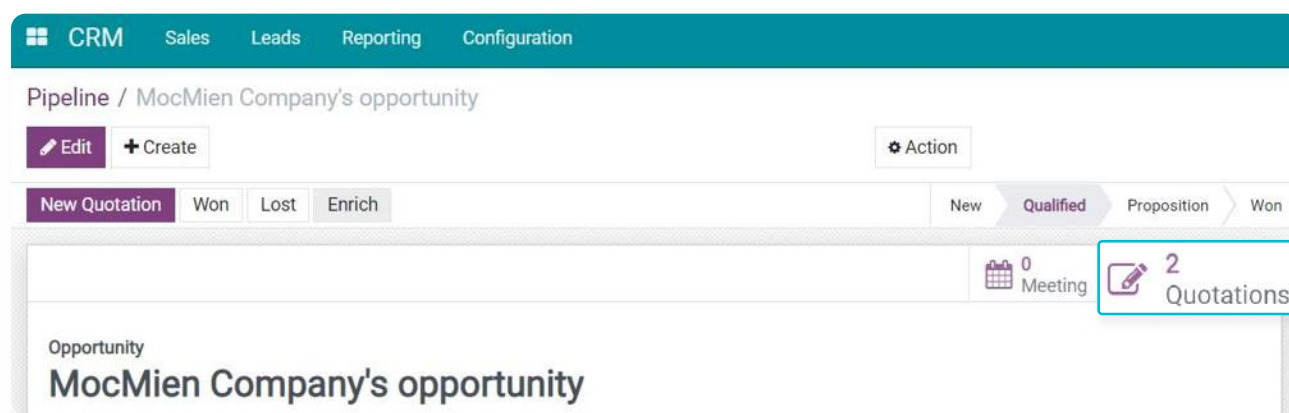
While taking care of a sales opportunity, customers may ask you to send a quotation for reference before making the final purchase decision. To create a quotation from an opportunity, navigate to **CRM ▶ Sales ▶ My Pipeline**, select the opportunity that is being taken care of, and press the **New Quotation**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

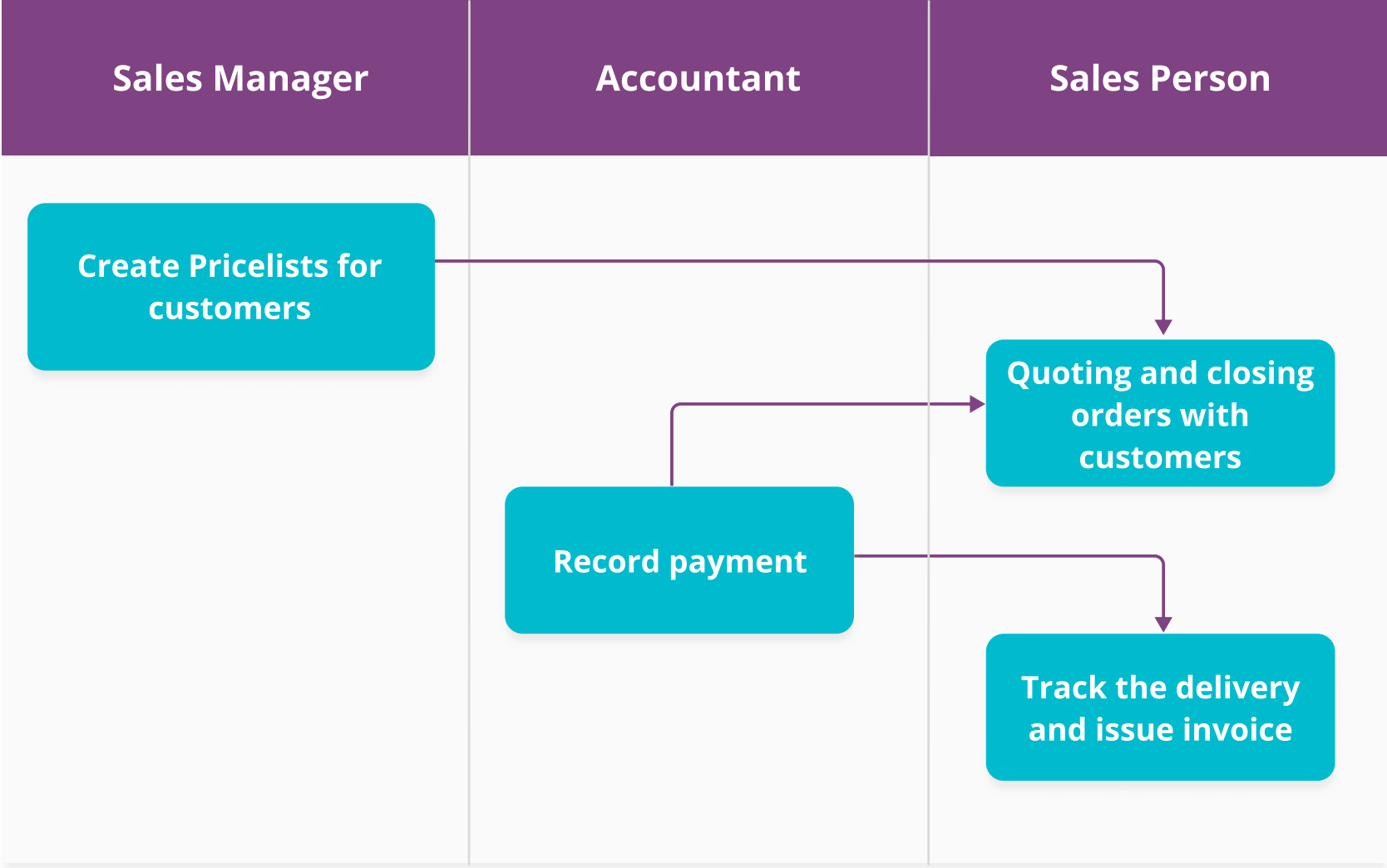


You will be redirected to the quotation creation interface to add the necessary information. From here, you can send the quotation to your customer via email and proceed with the next steps in the [sales process](#) (Page 75).



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

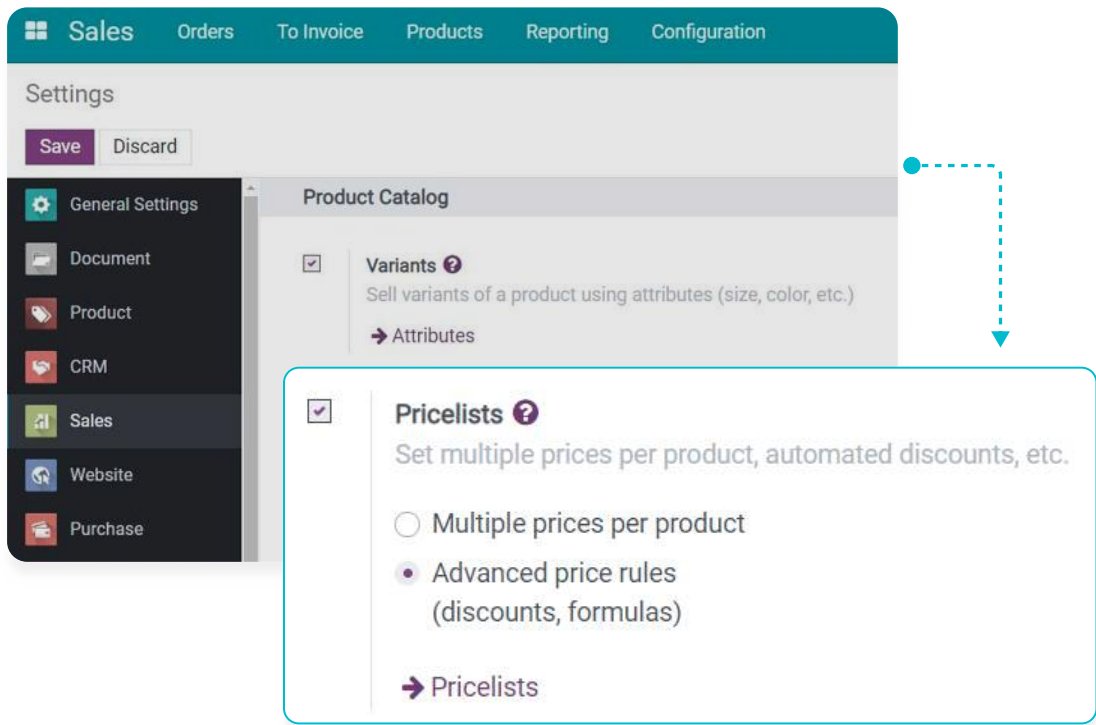




CREATE PRICELISTS FOR CUSTOMERS

Activate the Pricelists feature

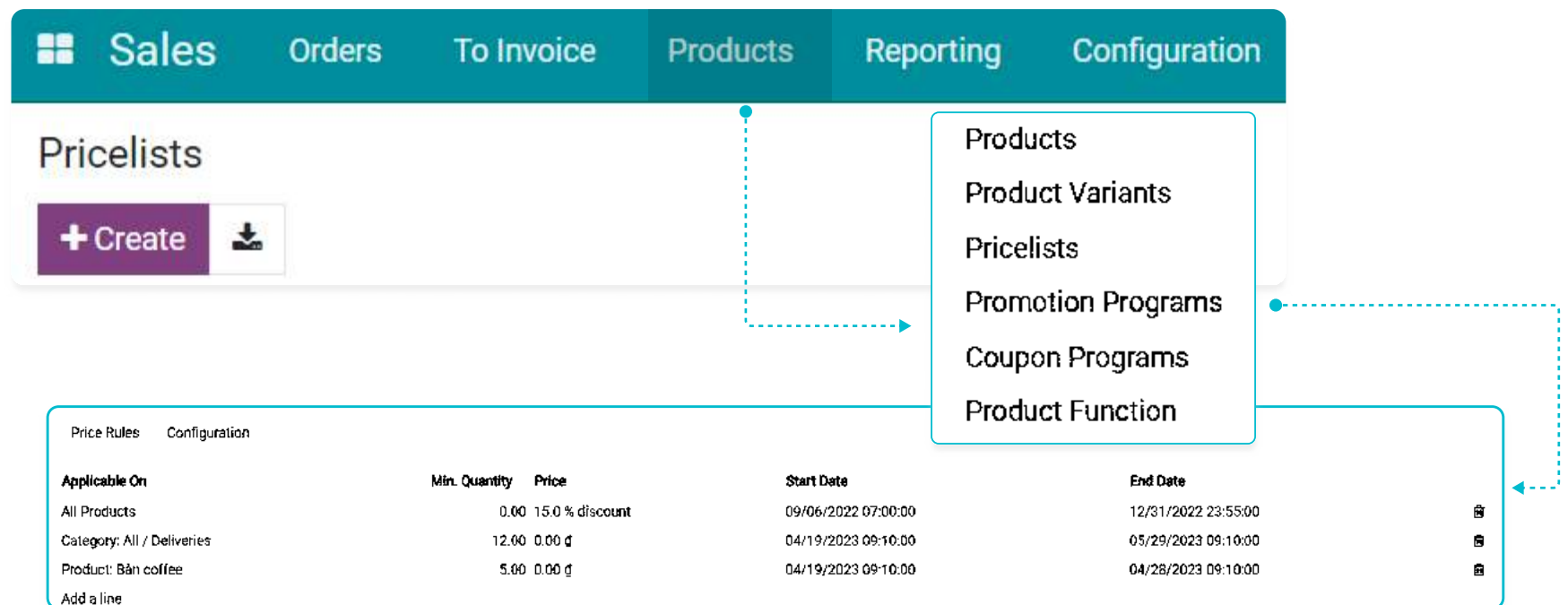
Navigate to the **Sales app** > **Configuration** > **Settings**. Go to the **Pricing** section and activate the **Pricelists** feature. Enable the **Multiple prices per product** option to set up pricelists using basic formulas. Press **Save** to finish.





## Create a pricelist for each customer

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

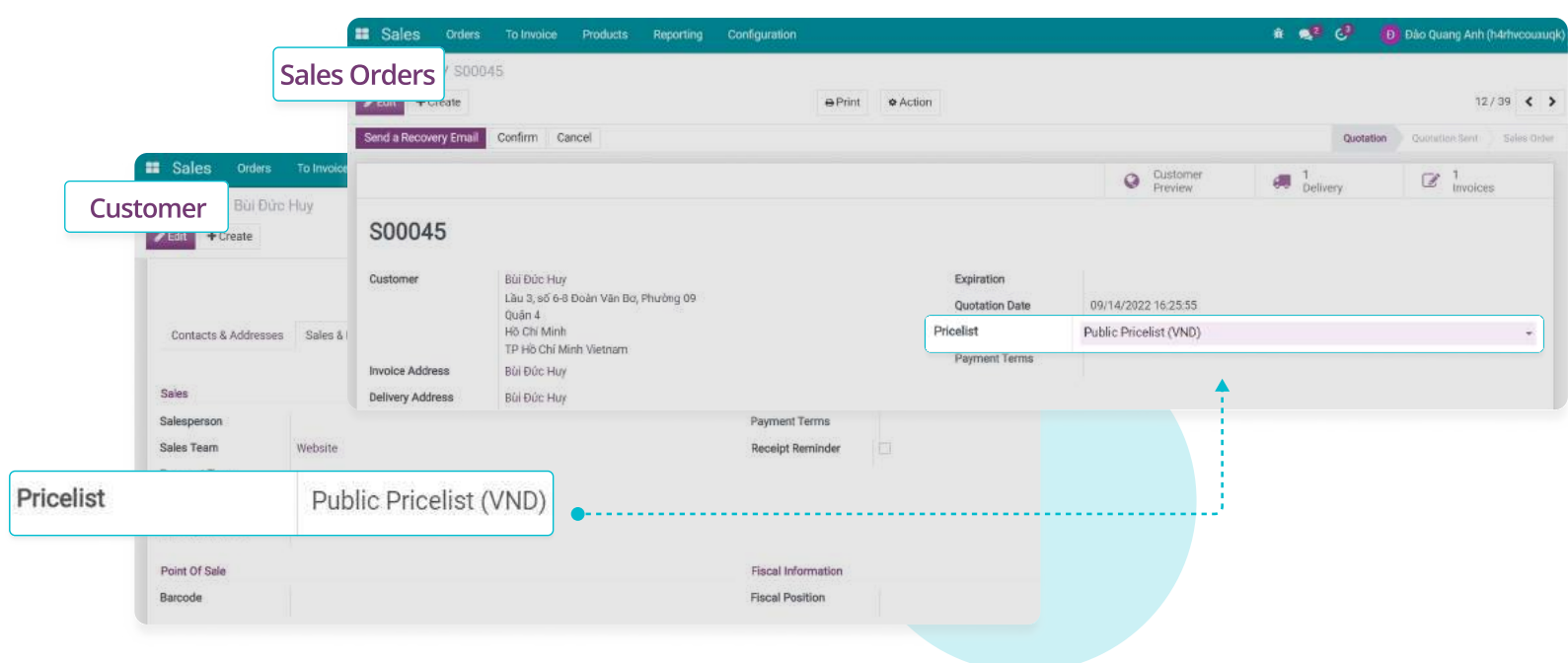


On the **Price Rules** tab, press **Add a line** and add the following information:

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

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

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



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

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

Pricelist

Public Pricelist (VND)

Benelux (VND)

EUR (EUR)

Bảng giá niêm yết (USD)

Default USD pricelist (USD)

Giáng sinh (VND)


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

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

## QUOTING AND CLOSING ORDERS WITH CUSTOMERS

### Create a new quotation

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



Sales

Sales

Orders

To Invoice

Products

Reporting

Configuration

Quotations

Quotations

Orders

Sales Teams

+ Create

My Quotations

Search...

Filters

Group By

Favorites

Number	Customers	Date	Customer	Salesperson	Next Activity
S00082		04/19/2023	MooMien Company	Quang Anh Dao	
S00081		04/19/2023	MooMien Company	Quang Anh Dao	

S00083

Customer

MooMien Company

Invoice Address

MooMien Company

Delivery Address

MooMien Company

Expiration

07/20/2023

Pricelist

Public Pricelist (VND)

Payment Terms

15 Days

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

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

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

Order Lines tab:

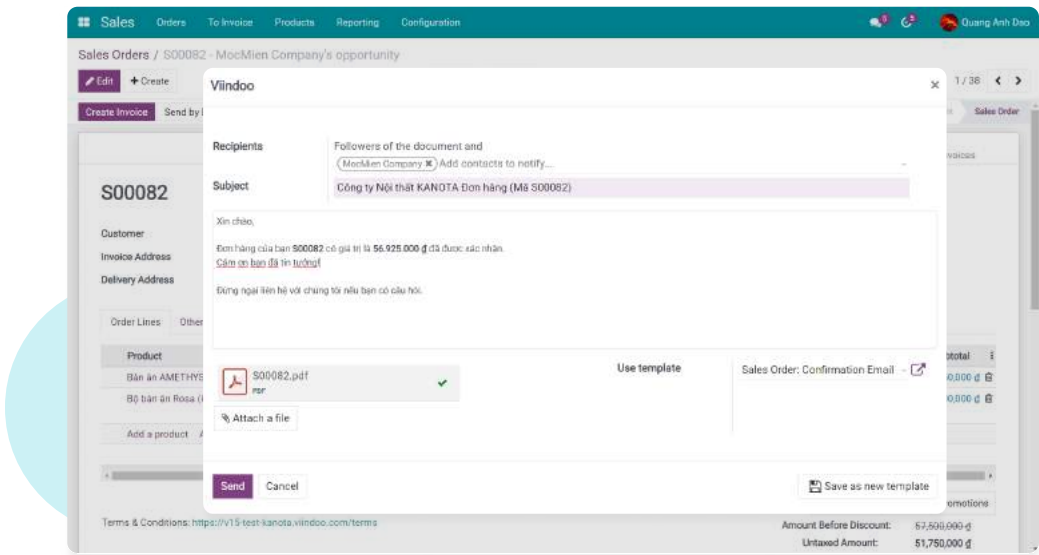
Order Lines									
Optional Products		Other Info		Customer Signature					
Product	Description	Quantity	UoM	Unit Price	Taxes	Disc.%	Subtotal		
Giường bọc nỉ	Giường bọc nỉ	2.00	Chiếc	45,000,000.00	Value Added Tax (VAT) 10%	0.00	90,000,000 đ		
Bộ sofa nỉ phòng khách	Bộ sofa nỉ phòng khách	2.00	Bộ	90,000,000.00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

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

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

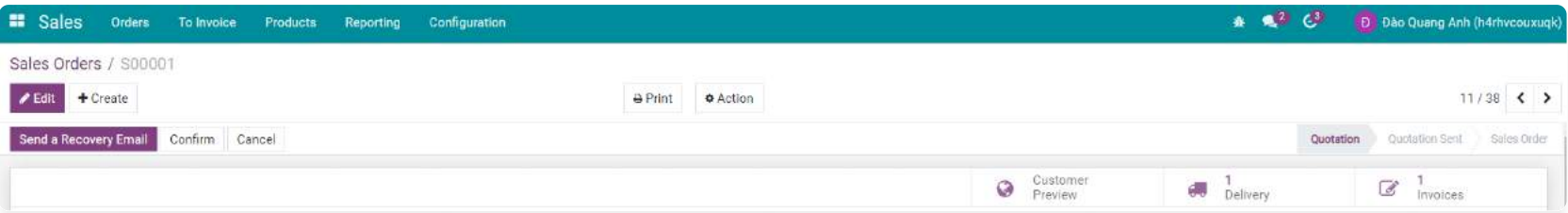
Confirming a sales order

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



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

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

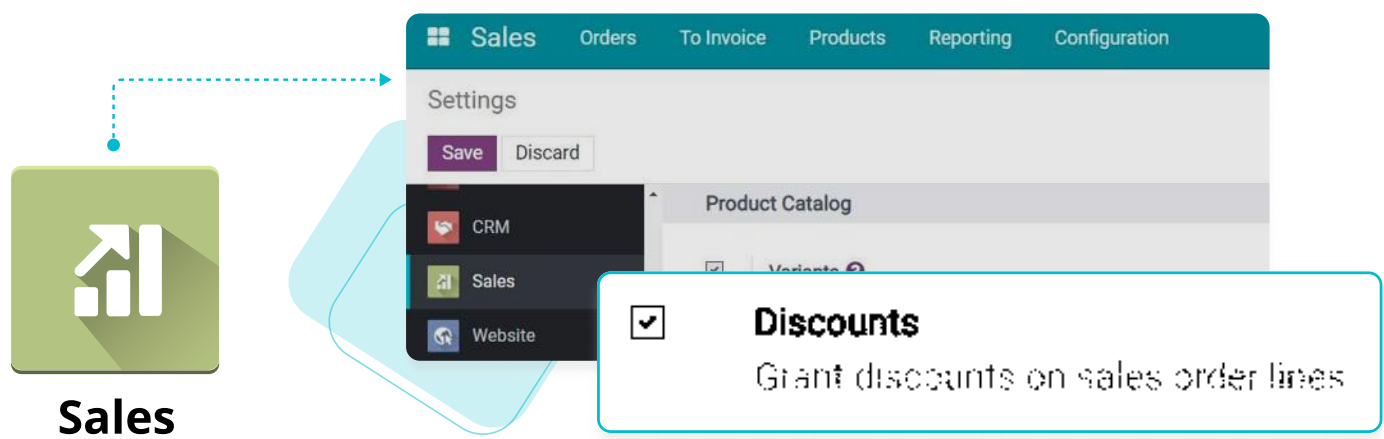




## Applying discounts to a sales order

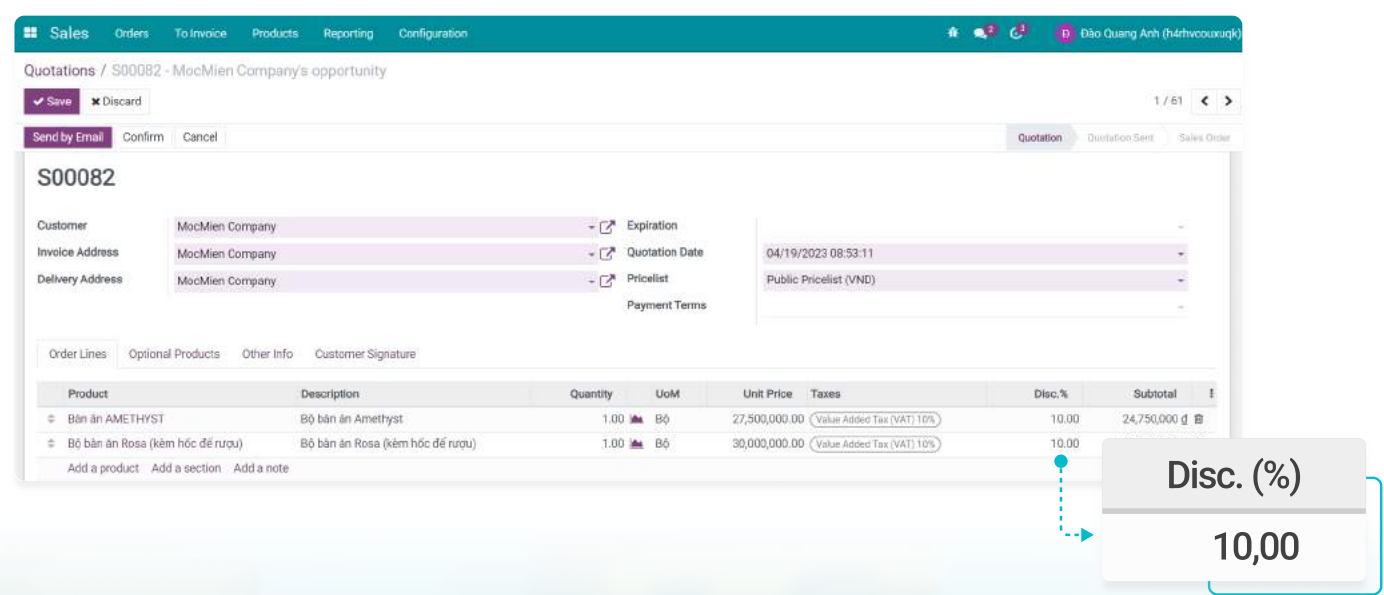
In many situations, a business might want to give discounts to their customers and Viindoo has just the right tool to assist you.

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



Press **Save** to finish.

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



## RECORD PAYMENT

➡ See details at:

- Record customer payment from Sales order.

## TRACK THE DELIVERY AND ISSUE INVOICE

### Track the delivery

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

The screenshot displays the 'Sales Order' view for order S00082. The order is for 'MocMien Company' and was placed on 04/19/2023. The order contains two items: 'Bàn ăn AMETHYST' and 'Bộ bàn ăn Rosa (kèm hộc để rượu)'. The 'Delivered' column shows that 1.00 unit of each item has been delivered. A callout box highlights the 'Delivered' column with the value '1,00'. Another callout box highlights the 'Delivery' button in the top right corner.

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

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

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

### Tracking invoicing status

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

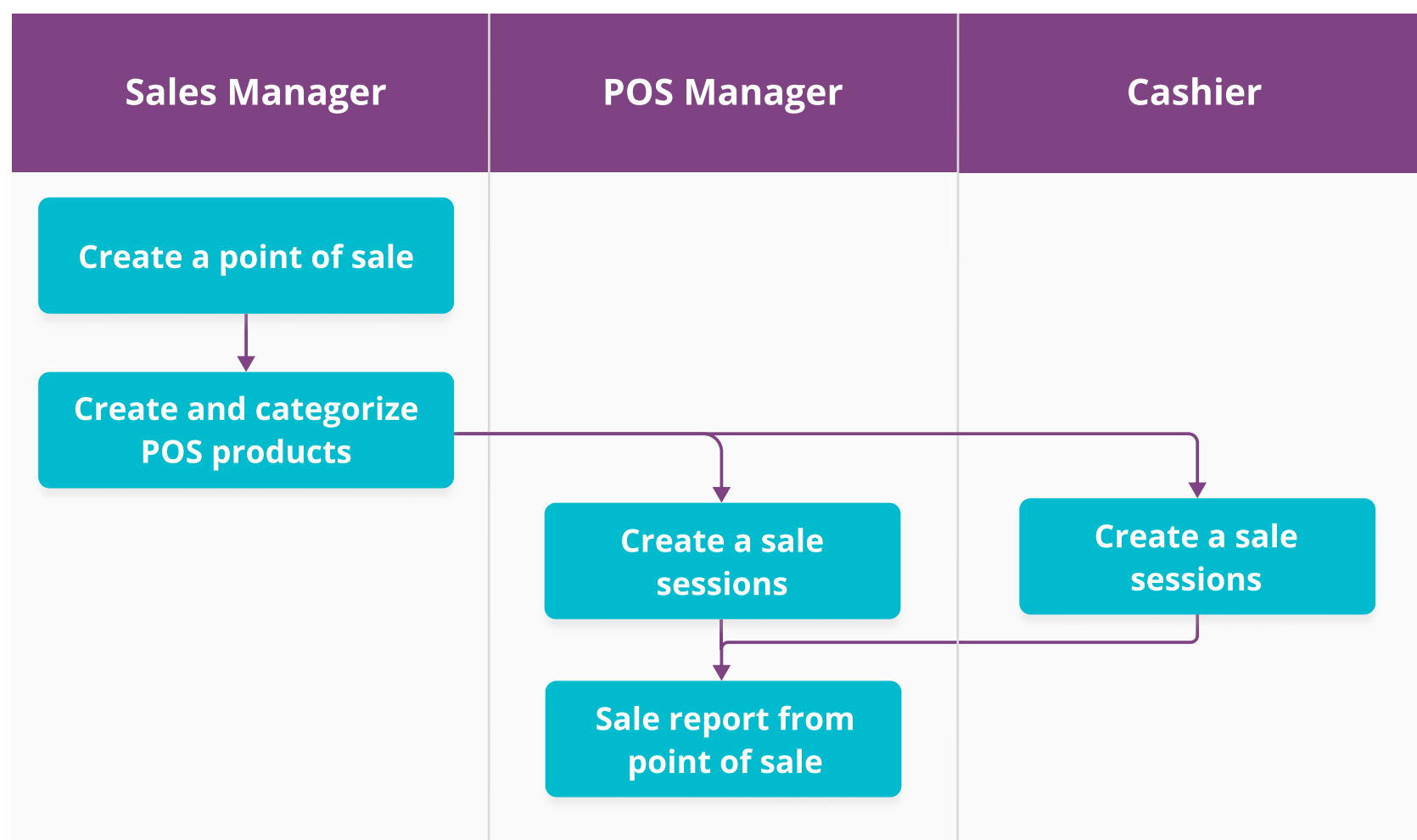
The screenshot displays the 'Sales Order' view for order S00082, focusing on the 'Invoiced' column. The 'Invoiced' column shows that 2.00 units of each item have been invoiced. A callout box highlights the 'Invoiced' column with the value '2,00'.

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

## RETAIL OPERATIONS AT POINT OF SALE

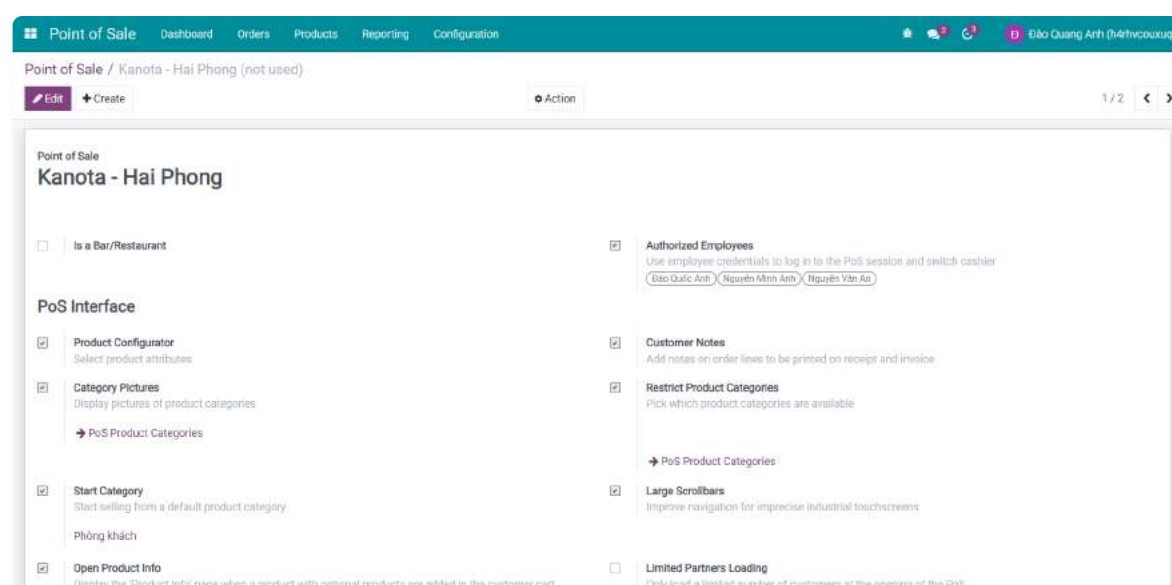
The *Point Of Sales (POS)* app is used at the payment counters of points of sale such as grocery stores, food retail chains, restaurants, etc. With the Viindoo software, you can create and set up information on each point of sale, then simply start a sales session.

### FOR RETAIL STORES



### Create a point of sale

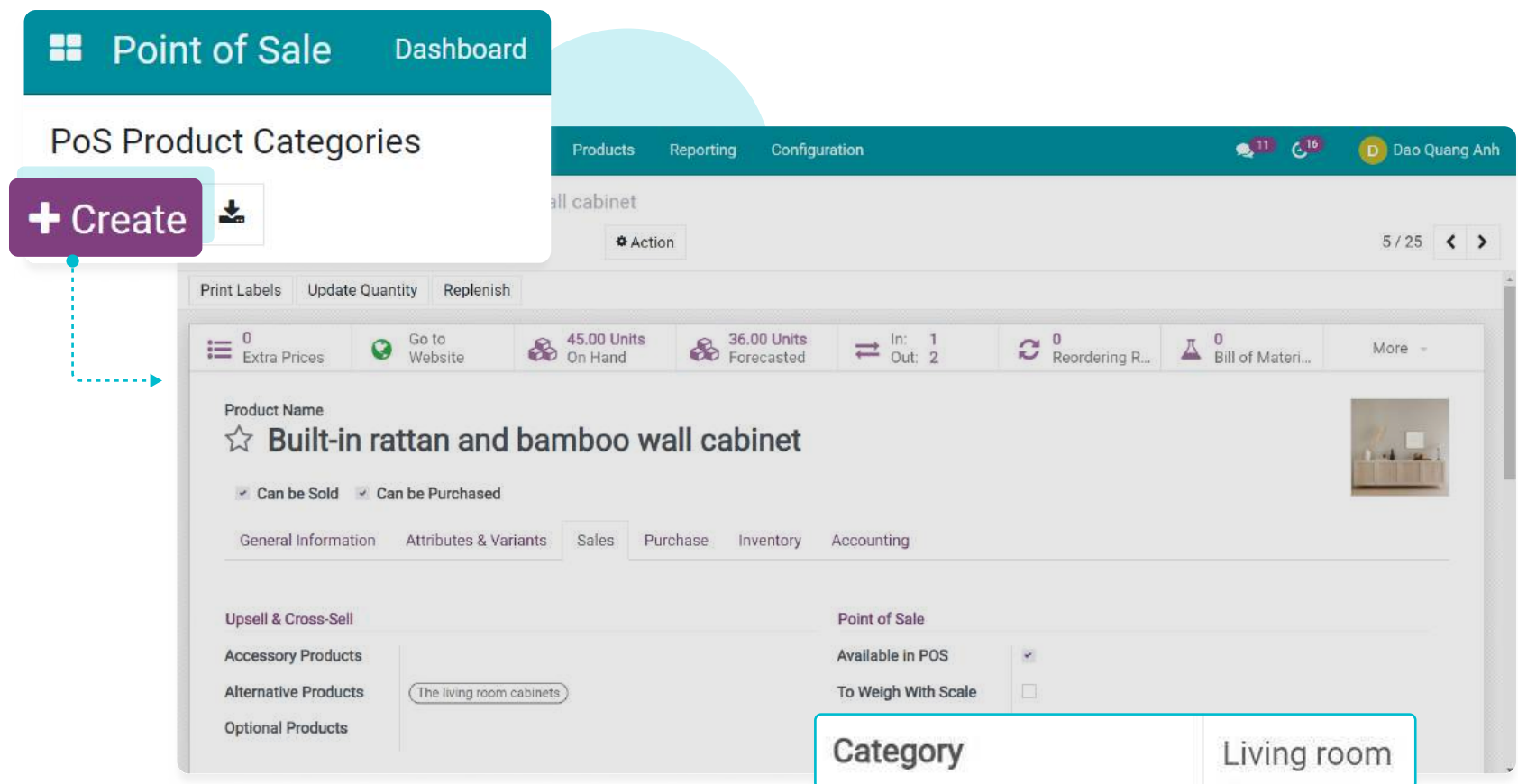
Navigate to **Point of Sale** ▶ **Configuration** ▶ **Point of Sale** ▶ **Create**, type the point of sale's name, and then configure the necessary features and information. You can create multiple points of sale corresponding to the stores/points of sale that need to be managed.





## Create and categorize PoS products

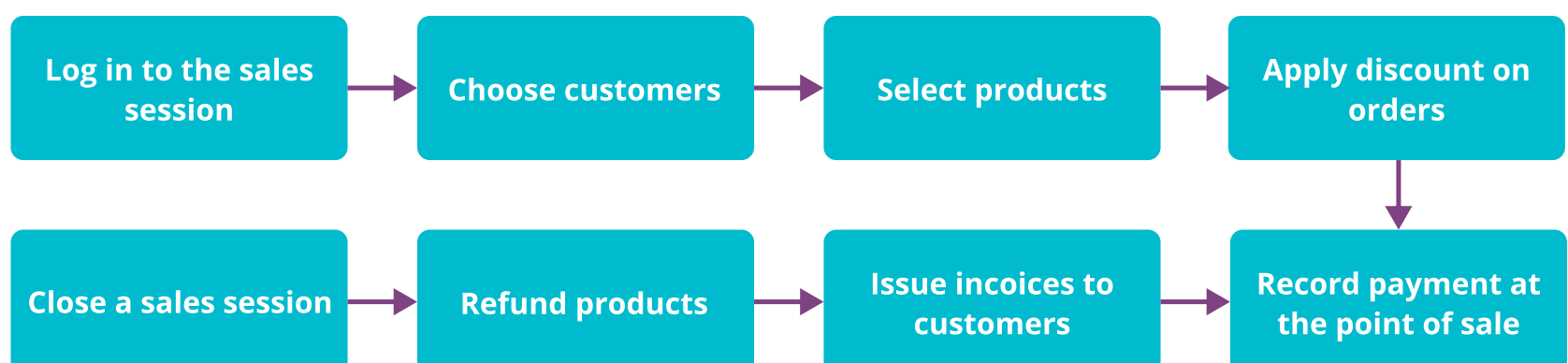
To make the sales process easier for a point of sale, you need to categorize the products. Viindoo software helps you to categorize the products by providing the **PoS Product Categories** feature. Navigate to **Point of Sale** ▶ **Configuration** ▶ **PoS Product Categories** ▶ **Create**.



Next, navigate to **Point of Sale** ▶ **Products** ▶ Products, and then [create a product \(Page 32\)](#). On the **Sales** tab, select the **Category** you just created.

To display an existing product on the PoS interface, you need to enable the **Available in POS** option on the Sales tab.

## Create a sale sessions



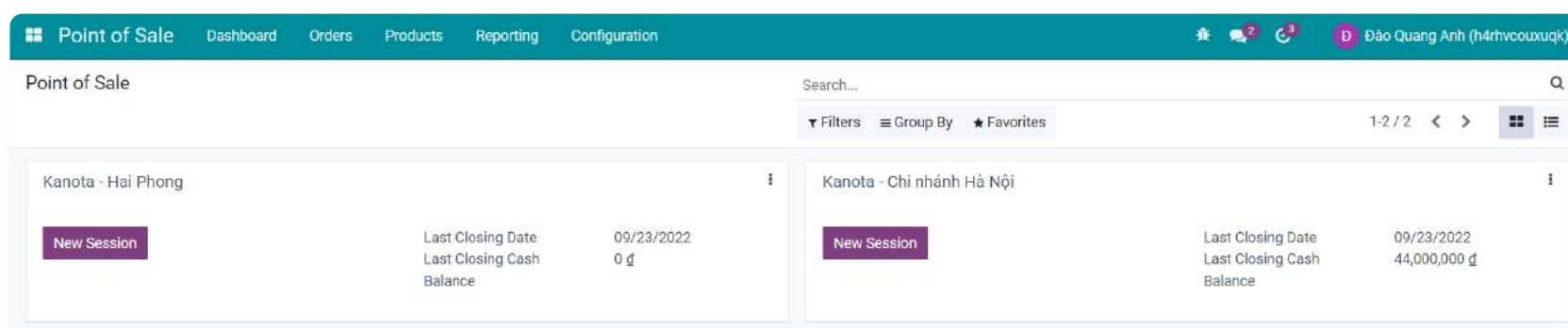
## Log in to the sales session

A sales session can be split into 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.

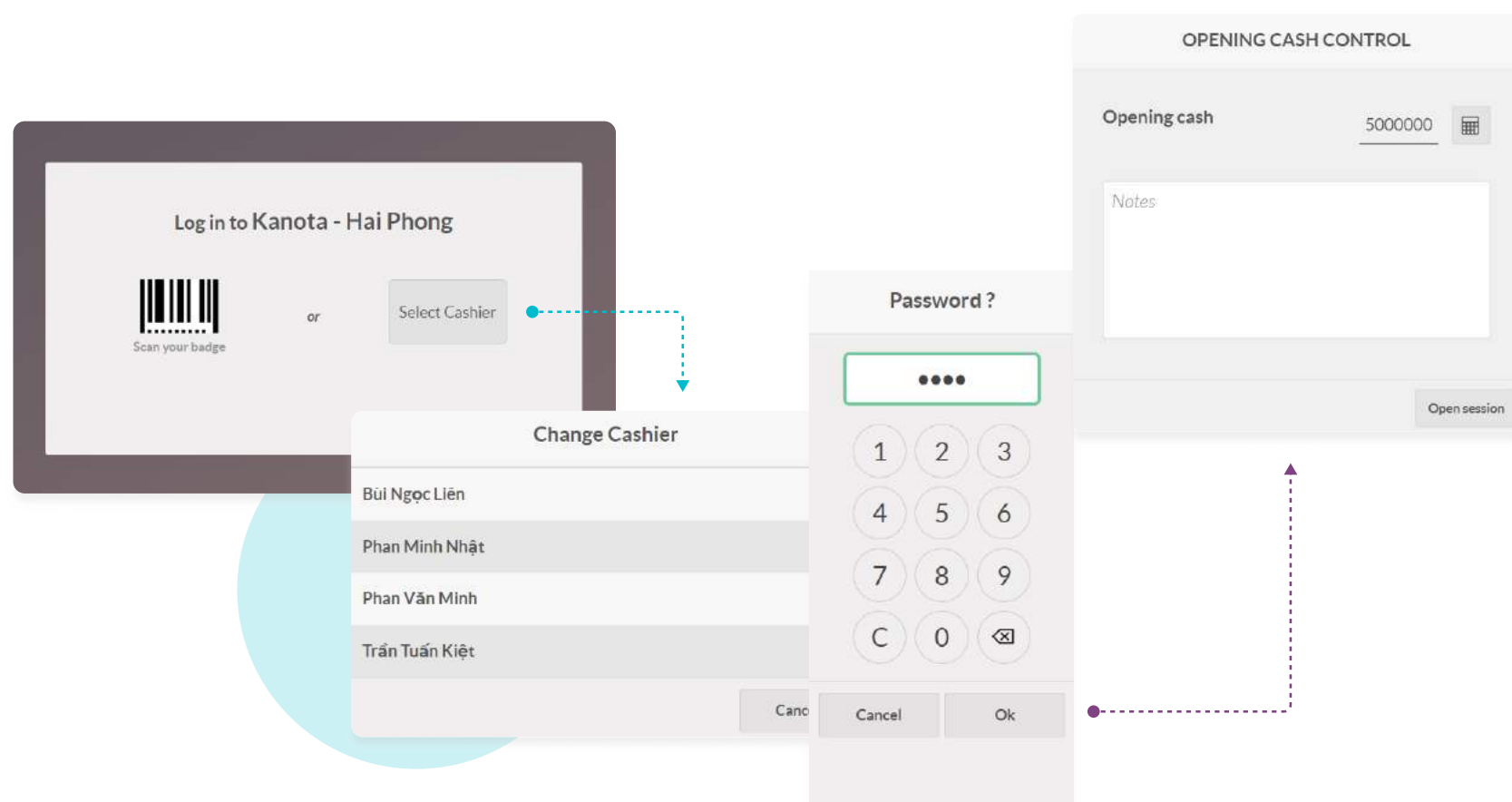
As a point of sale manager (with a user account logged into the system), you can navigate to the **Point of Sale** app, and press **Open Session** on the point of sale that you are working at to start a new session.



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

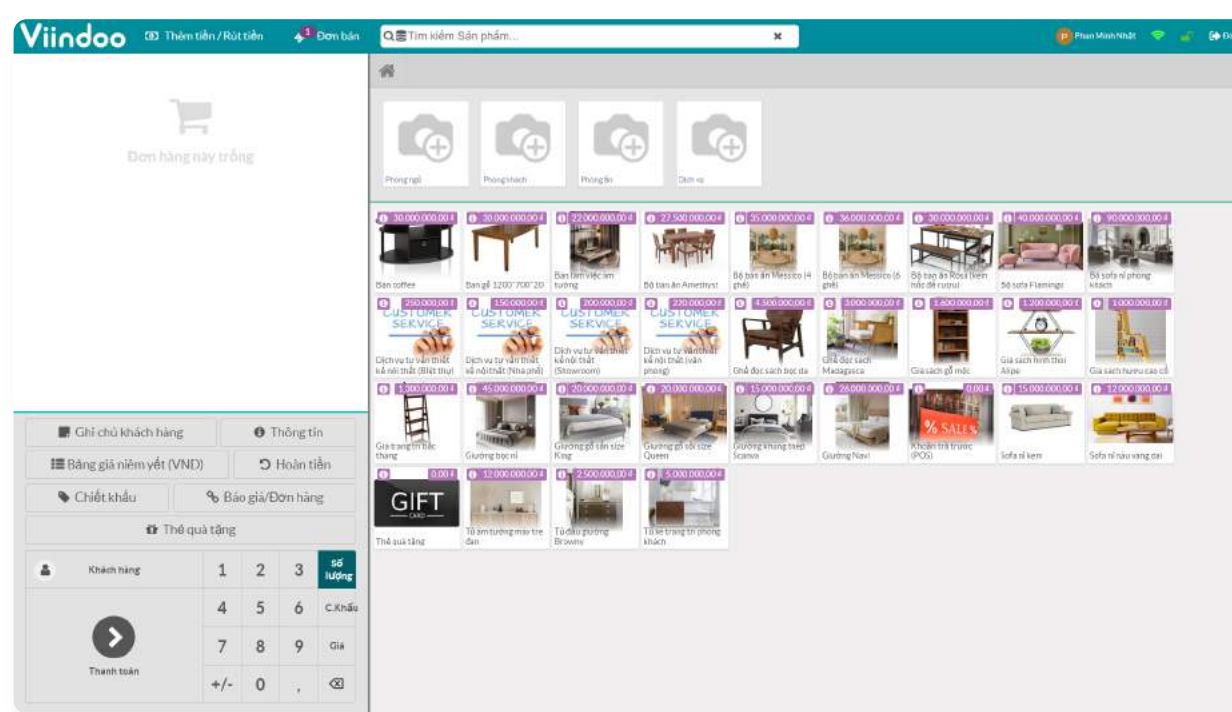
### ➔ See details at:

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



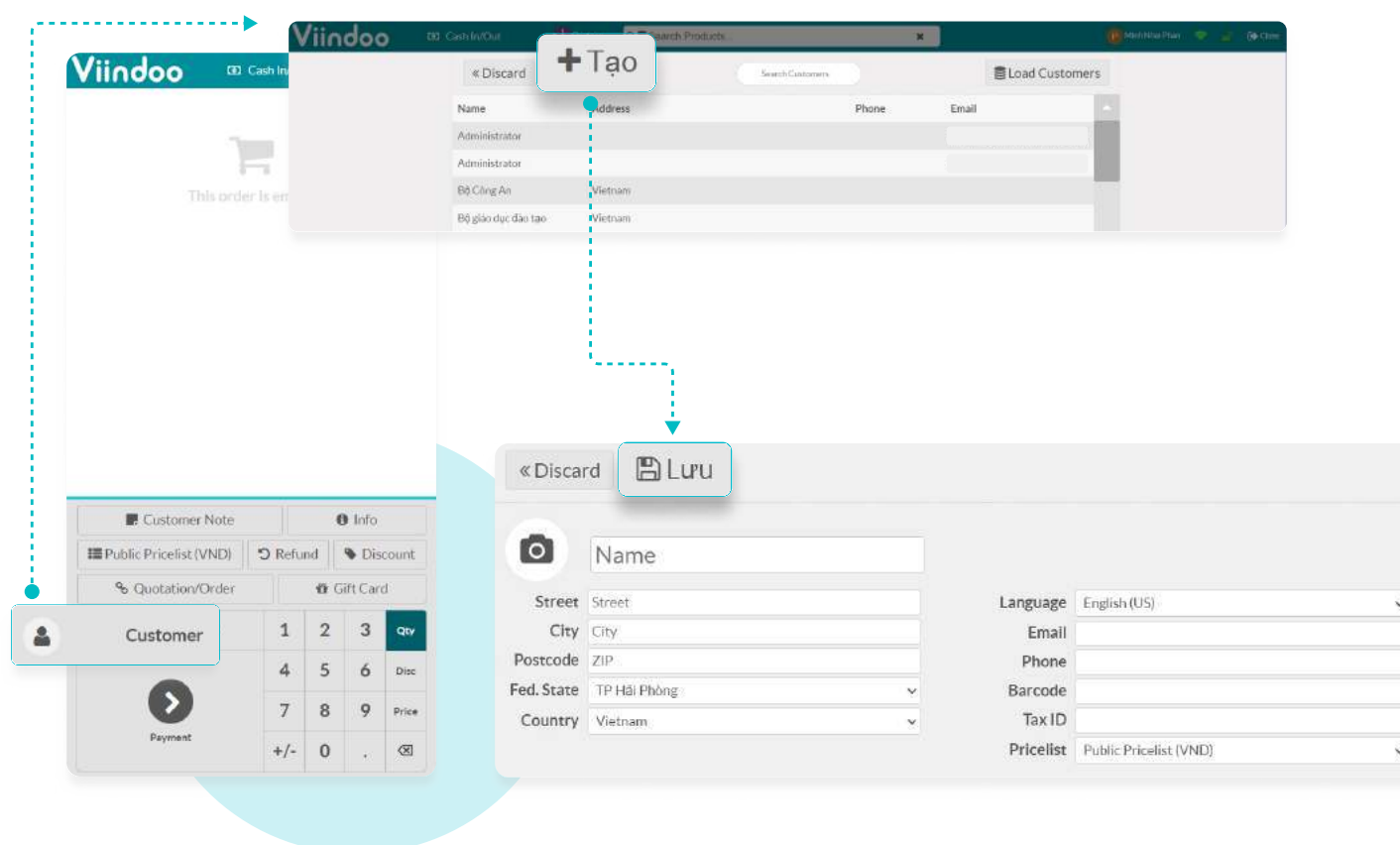
Enter the opening amount of cash then press **Open session**.

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.



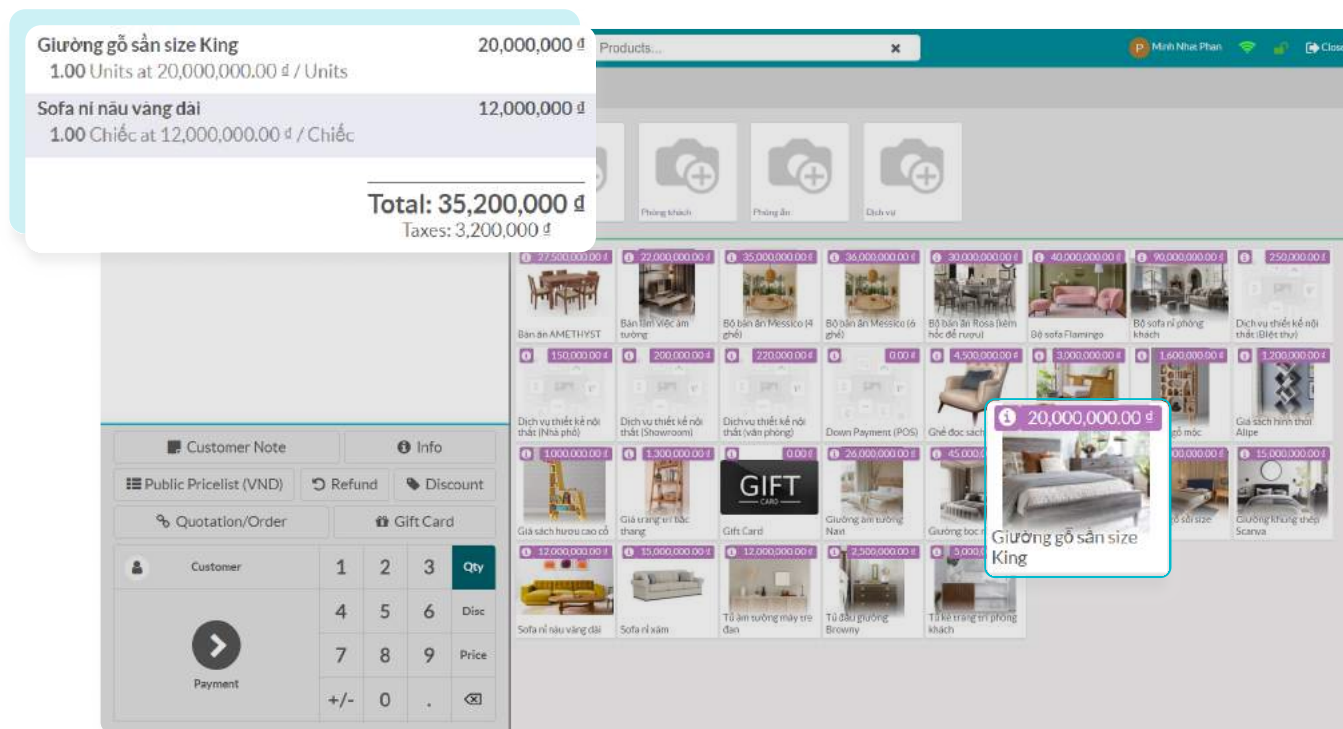
Next, you can use a name or phone number on the search bar to check if this contact is already existing in your system. In case this contact is already a customer, select the correct customer name and click **Set Customer**.

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

You select the products the customer wants to buy and click **Qty** to adjust the quantity.



➔ See details at:

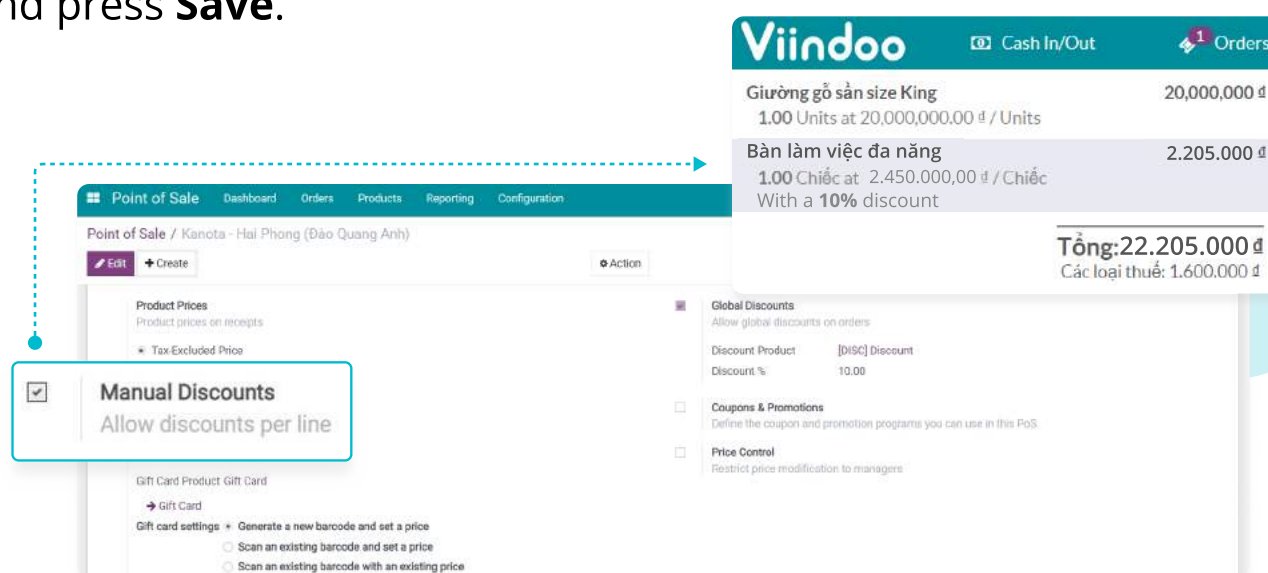
- *Products and Product categories in the Point of Sale.*

## 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

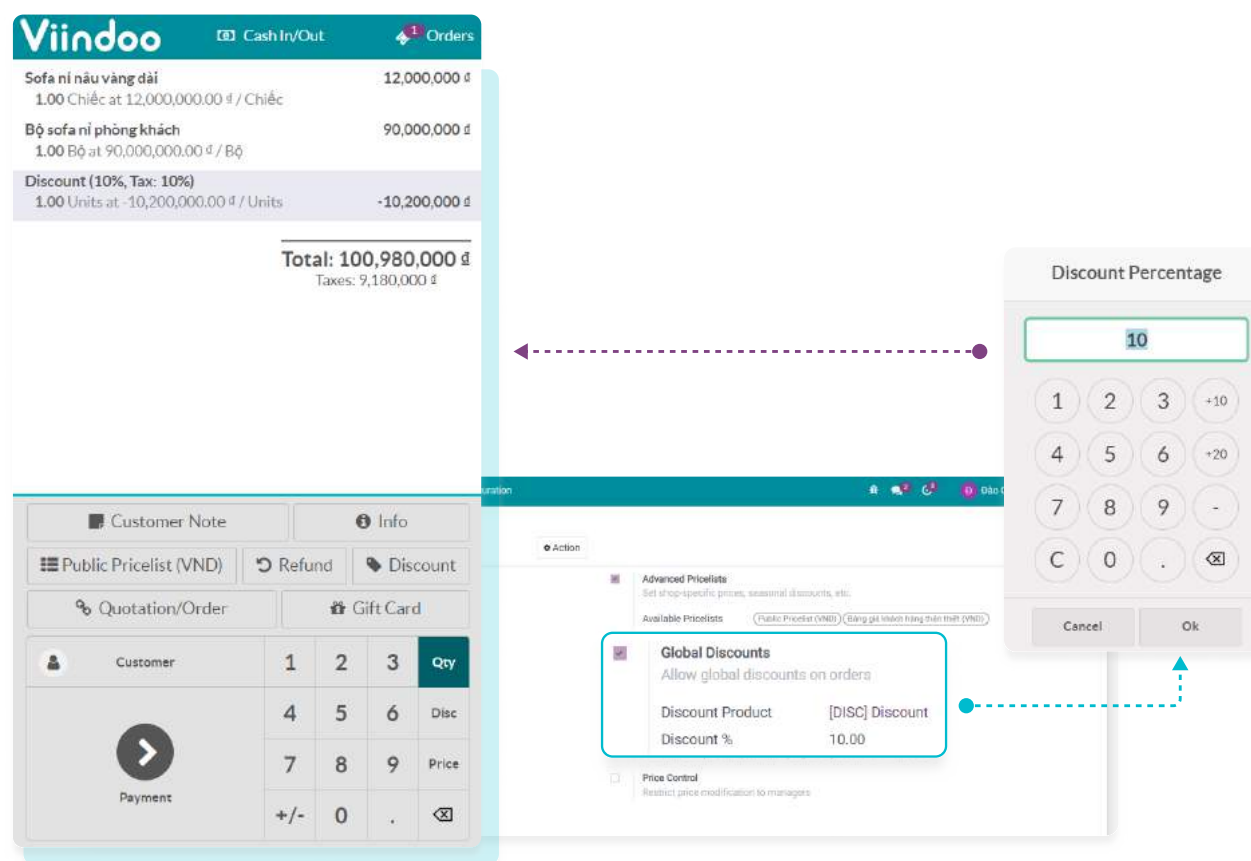
Navigate to **Point of Sale** ▶ **Configuration** ▶ **Point of Sale**. Select a point of sale that this promotion is applied to, in the **Pricing** section, enable the **Manual Discounts** feature and press **Save**.



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**.

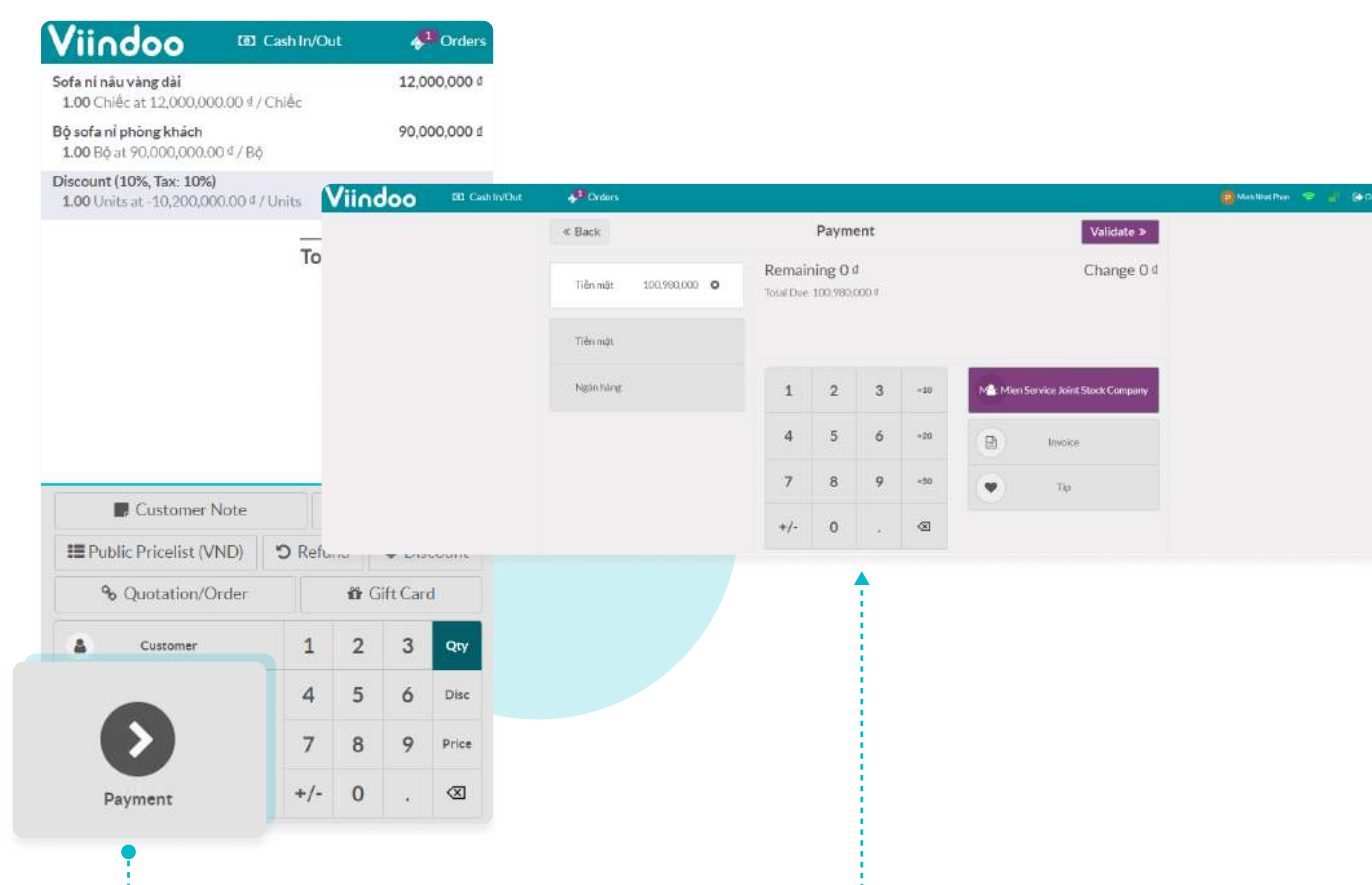


Next, you can create a sales order at the point of sale, add products to the order and select **Discount**.

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

## Record payment at the point of sale

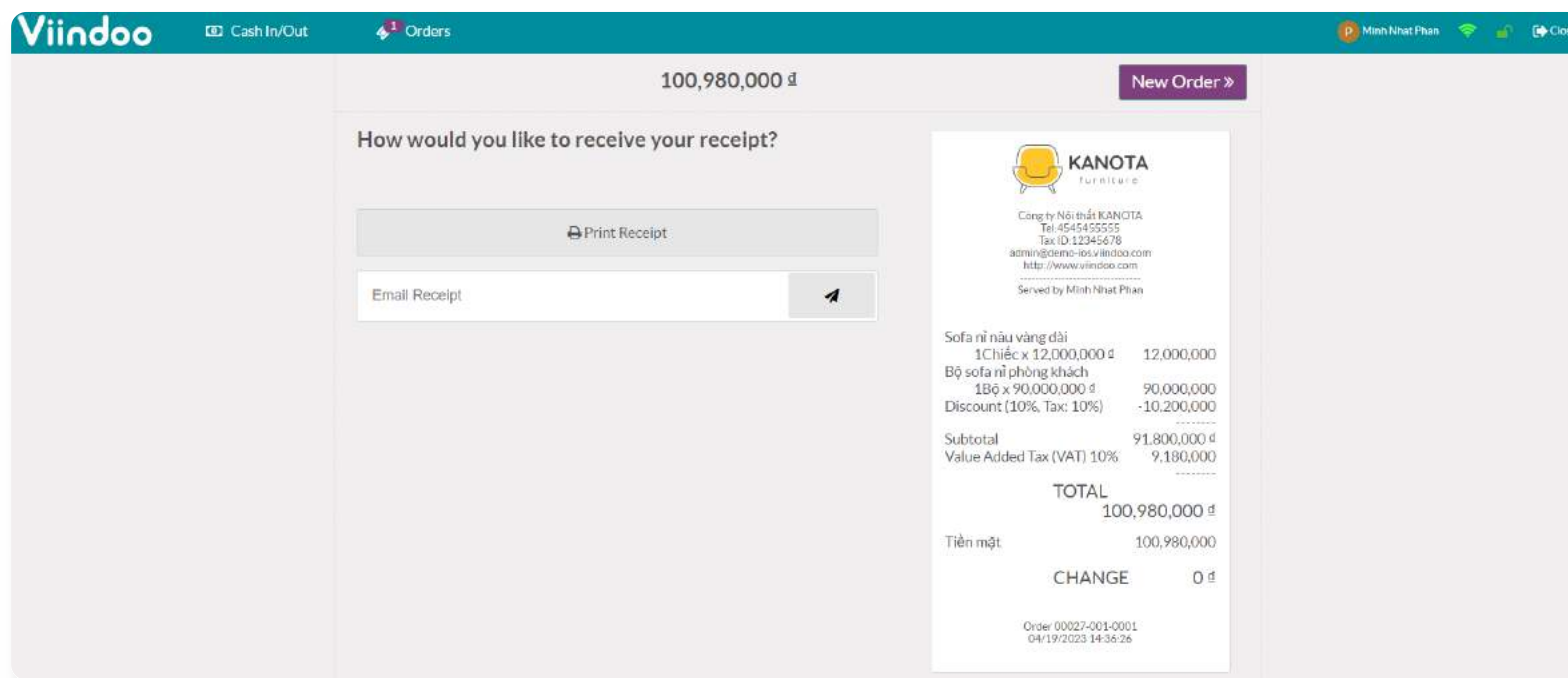
To proceed with the order payment, click **Payment**.



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

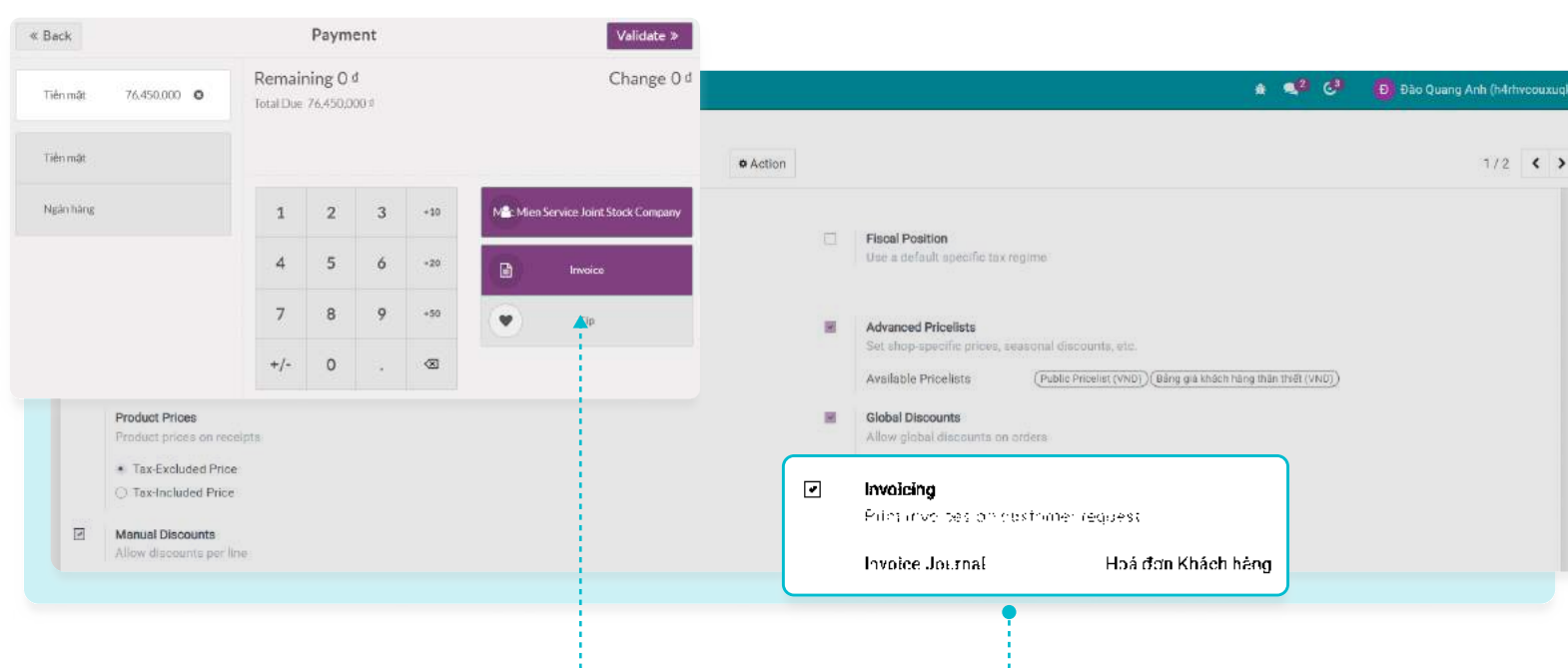
After confirming the payment, the system automatically displays the receipt of the order. You can print the receipt or email it to your customer.

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



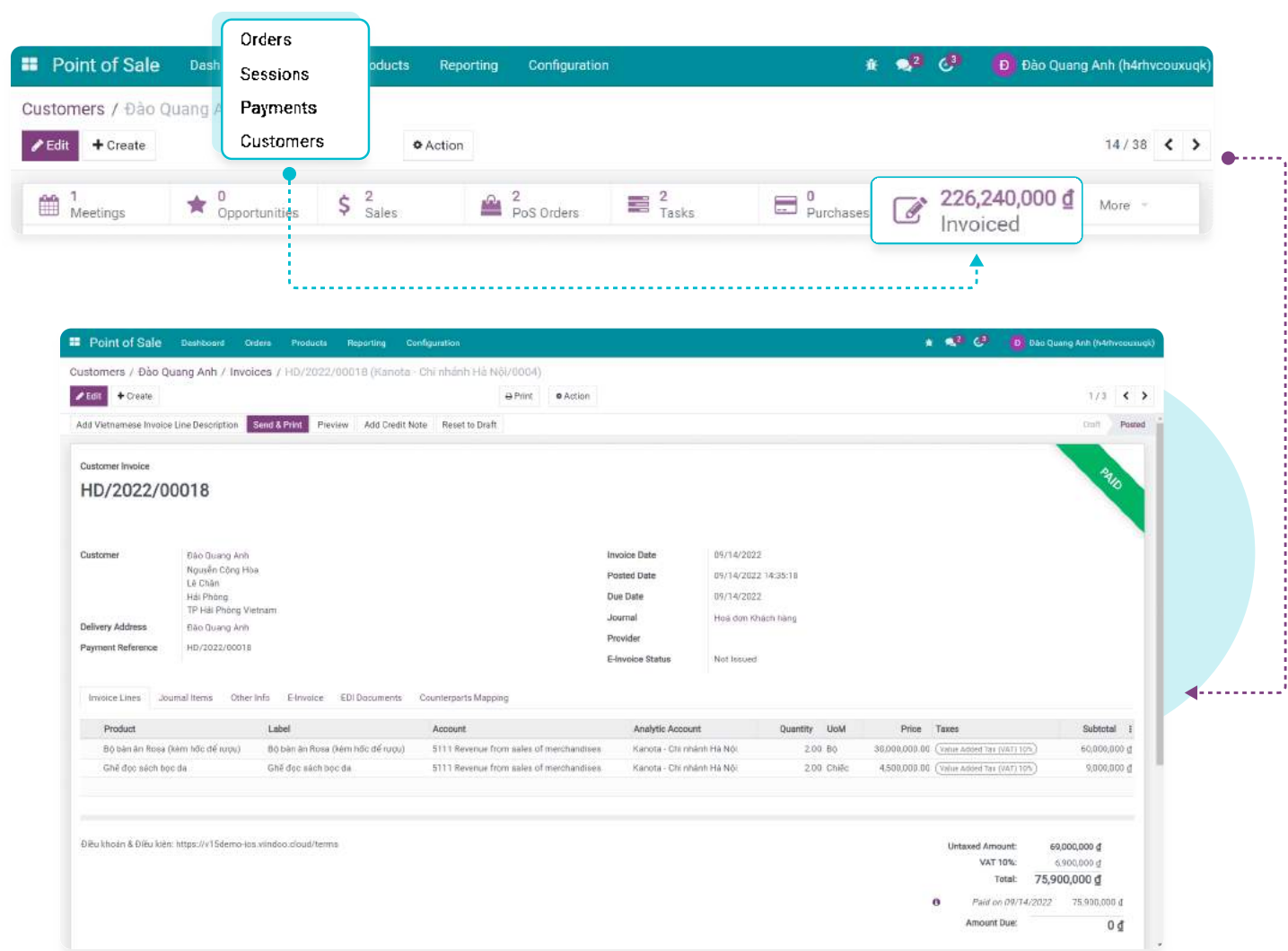
### Issue invoices to customers

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**.



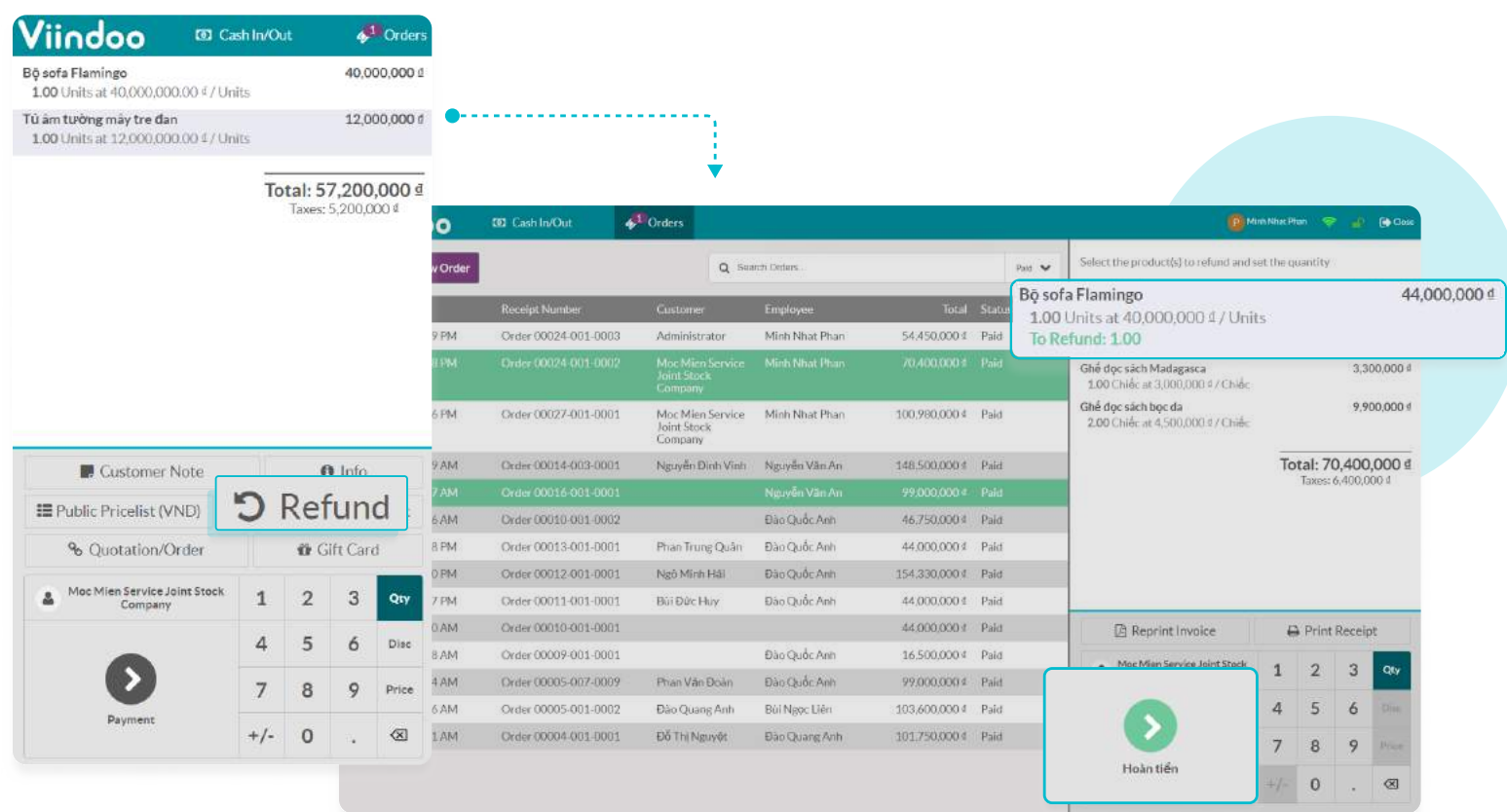
At the payment screen, select the customer's preferred payment method, select **Invoice** and click **Validate**.

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**.

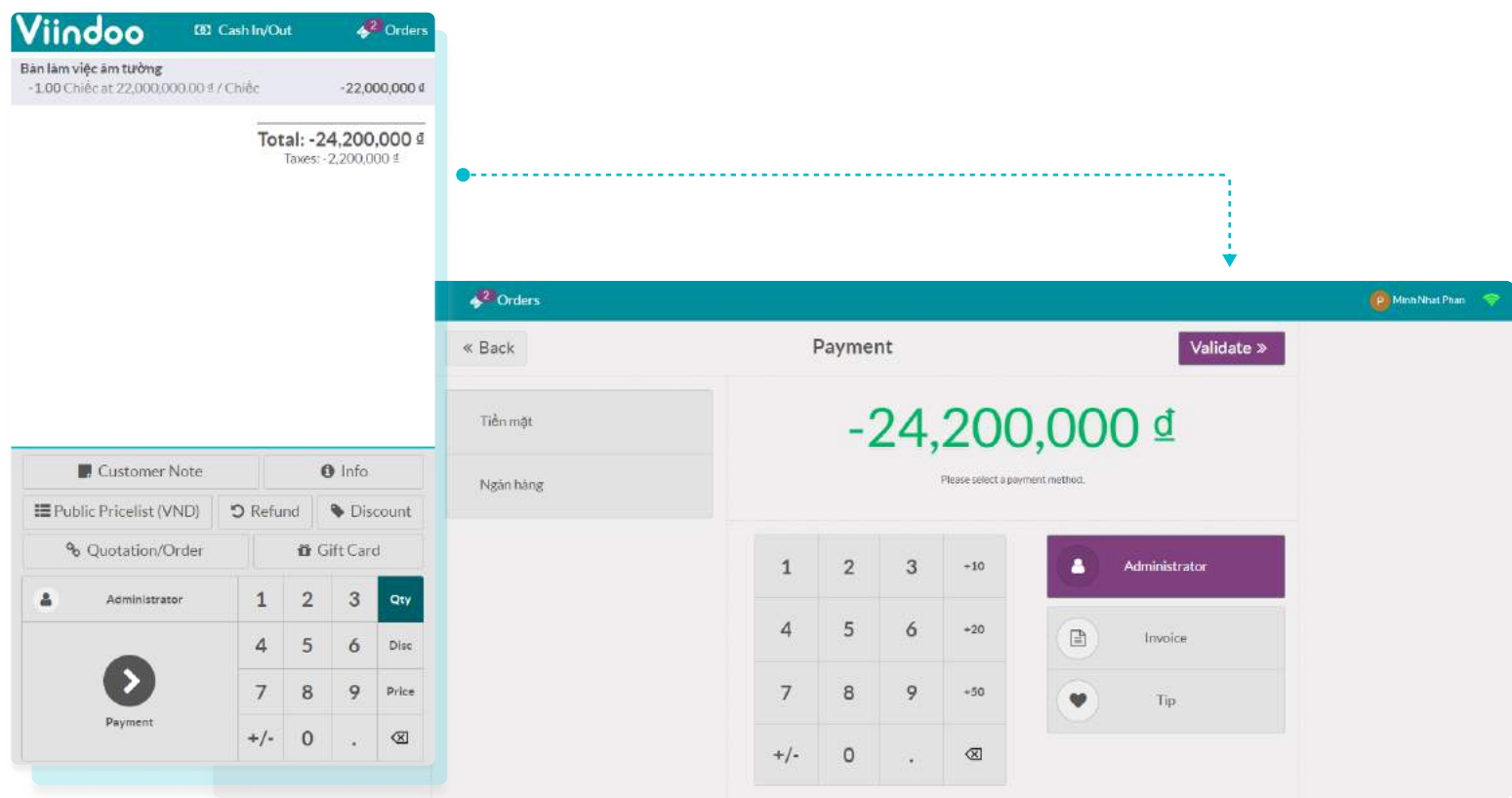




The software navigates you to the list of orders, select the order you want to return:

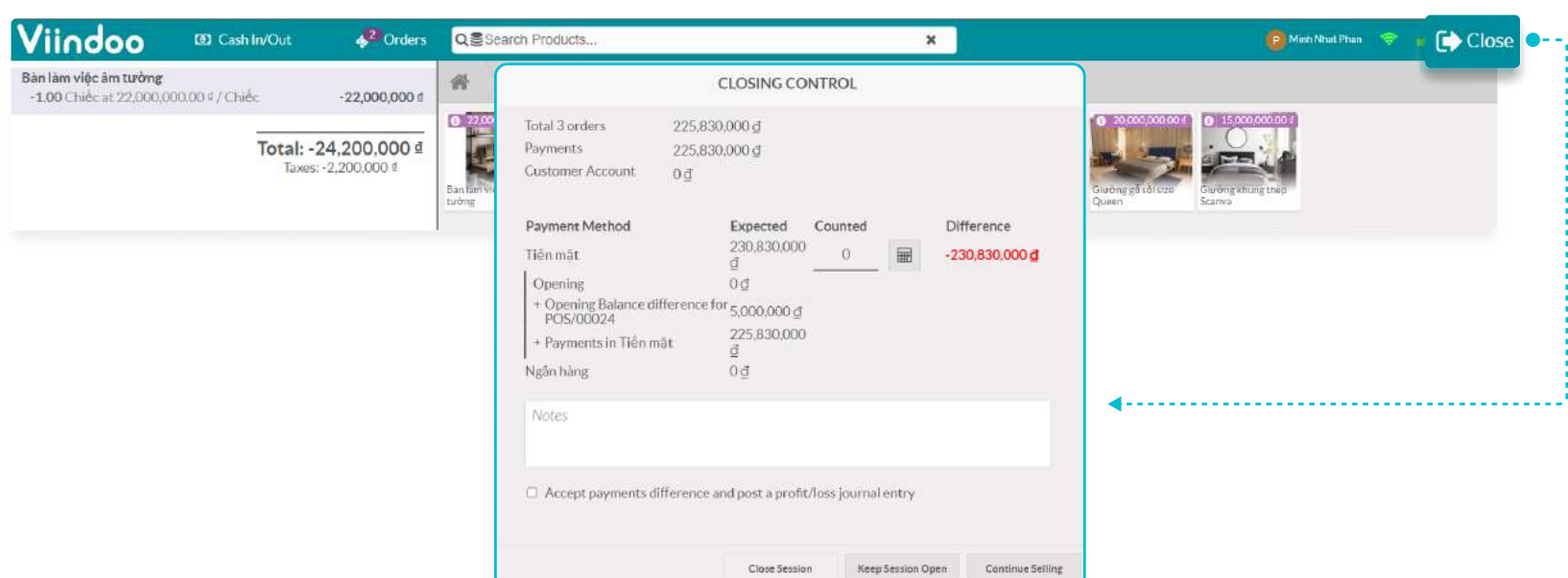
- *Refund a product:* Click **Qty** and enter the amount to be refunded then press **Refund**.
- *Refund a sales order:* Click **Refund**.

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

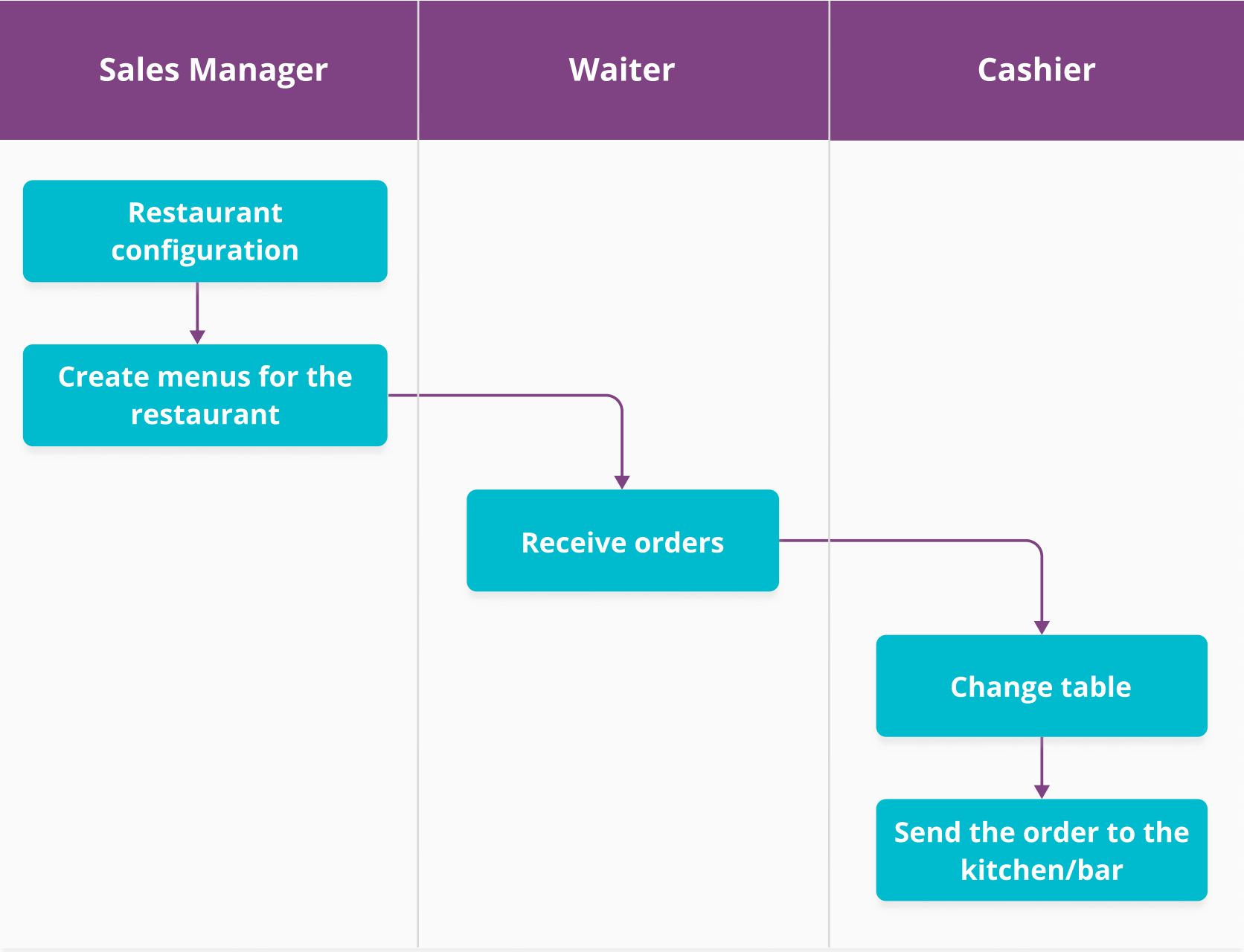
At the end of the sales session, you click **Close** to close the session.



➡ See details at:

- Cash control.

FOR RESTAURANT

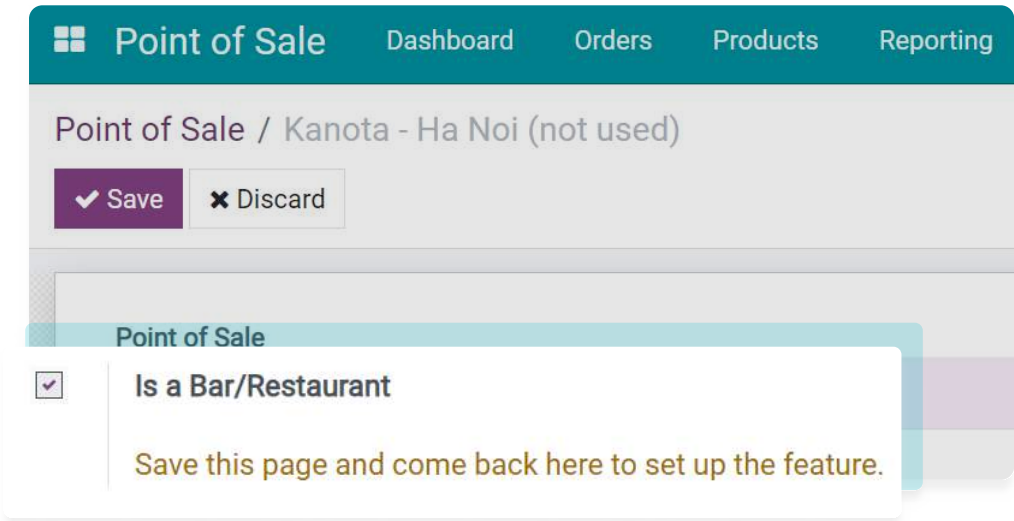



In Viindoo software, the operations and transactions at a restaurant are relatively similar to those at a retail store. However, you need to activate the restaurant management feature to use the features specifically designed for the restaurant and bar operations of your business. Below are some operations specific to restaurants in Viindoo software.

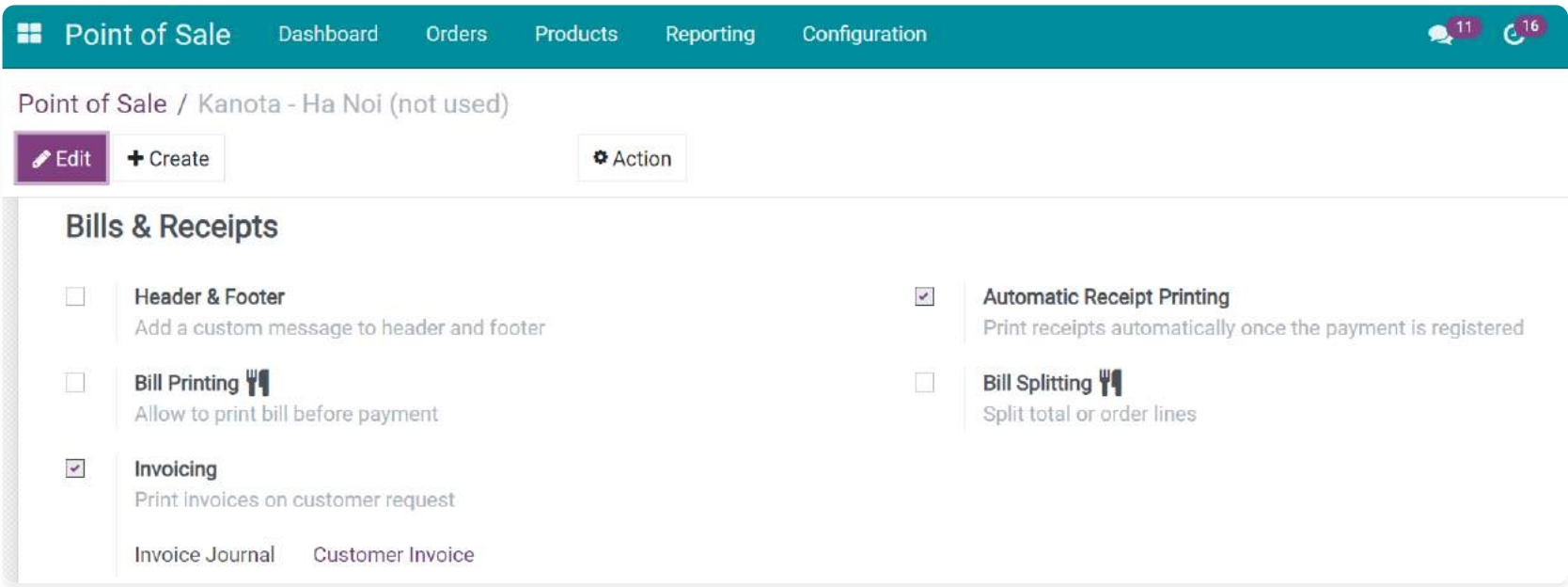
Restaurant configuration

Activate the specific features for restaurants

Navigate to **Point of Sale** > **Configuration** > **Point of Sale** to create a new point of sale and check on the **Is a Bar/Restaurant** option.

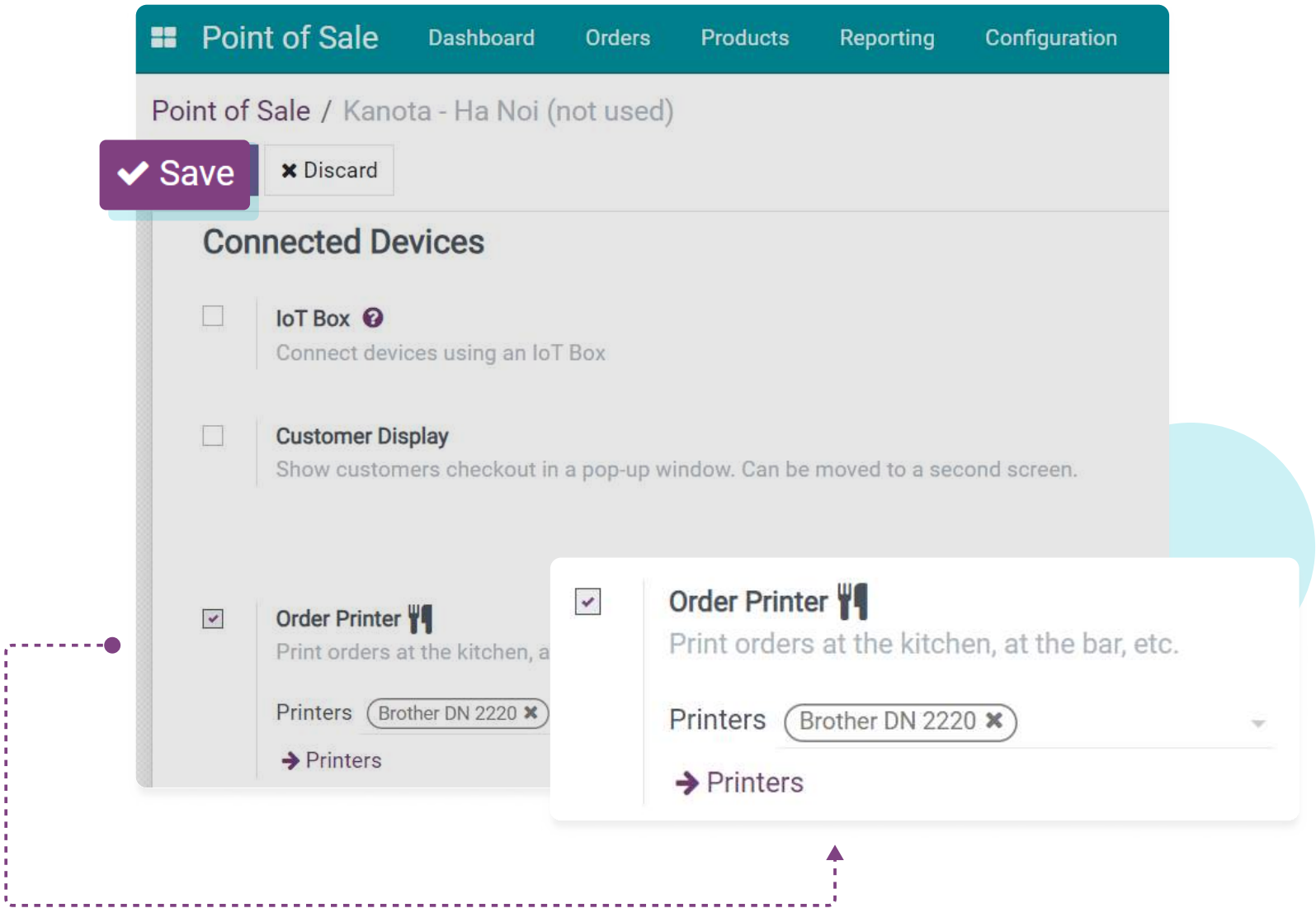


The specific options for restaurants will be identified by the cutlery icon , for example: printing receipts before payment, splitting bills or lines for each order on the bill.



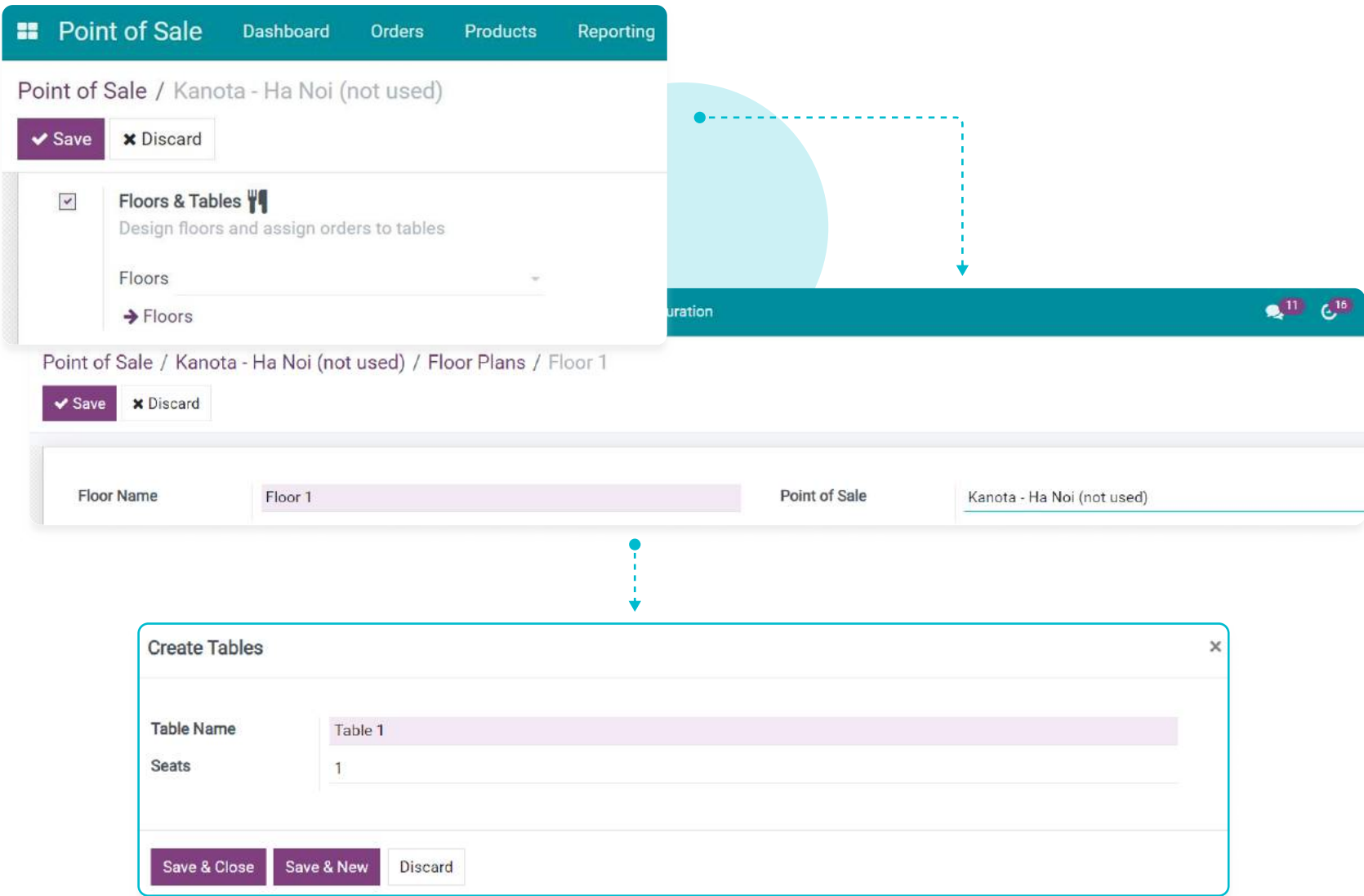
*Set up the Order Printer*

On the Point of Sale configuration interface, enable the **Order Printer** option and configure printers in the **Connected Devices** section, then click **Save** to complete the setup.



*Configure floors and tables plan*

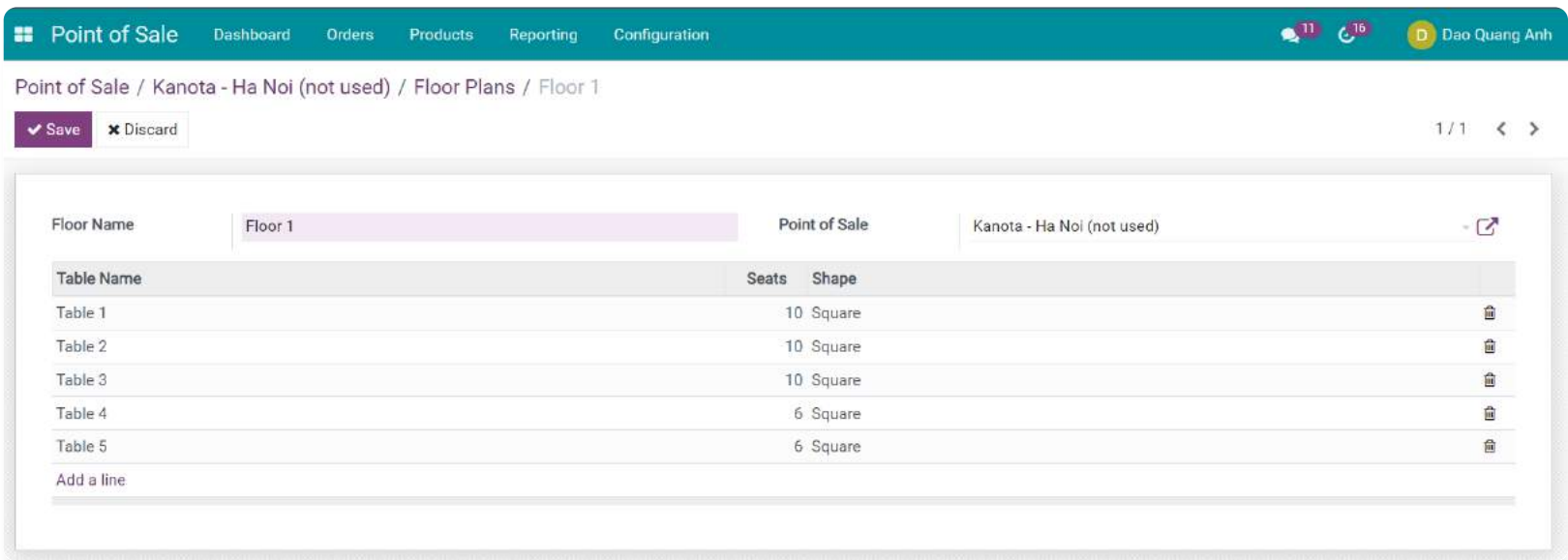
If you need to design and arrange the floors and tables plan of your restaurant, you can activate this feature in the configuration of the Point of Sale by enable the **Floors & Tables** option.



Press **Floors ▶ Create** to start configuring floors plan according to the real design of your restaurant.

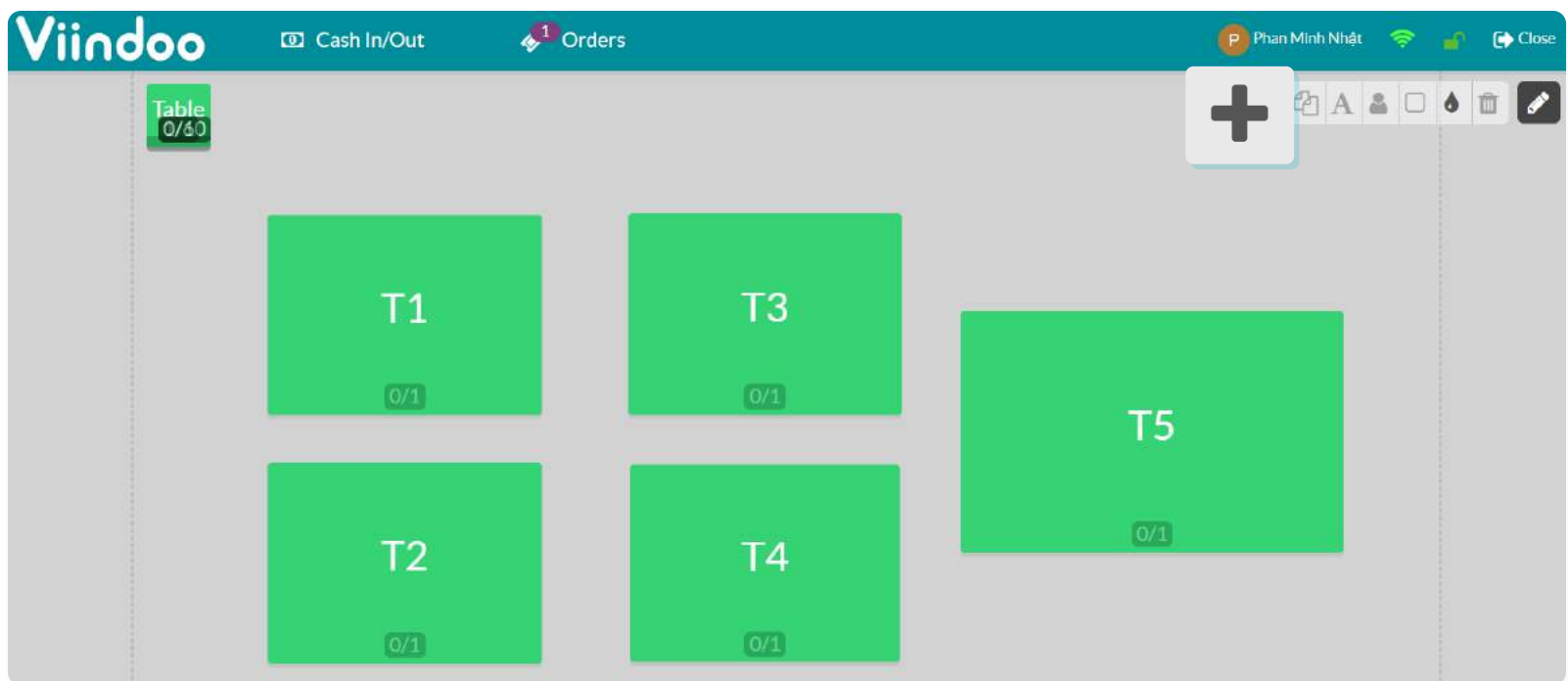
Next, you can create tables on each floor by pressing **Add a line**, type the table name and the maximum number of seats for the table. Press **Save & New** to continue creating new tables.

Press **Save** to save the configuration.





To have a clearer view of the location of the created tables, you need to access the Point of Sale module, select a point of sale, and click on **New Session** to start. From here, an overview of the tables on each floor will be displayed and you can switch between different floors. By default, the table shape is rectangular/square but you can change it to circles or ovals in accordance with your reality. The software also supports changing the size and color on the display interface by clicking on the **Pencil** icon in the top right corner of the screen and selecting the corresponding options.



You can also create a new table on this view by pressing the + button.

## Create menus for the restaurant

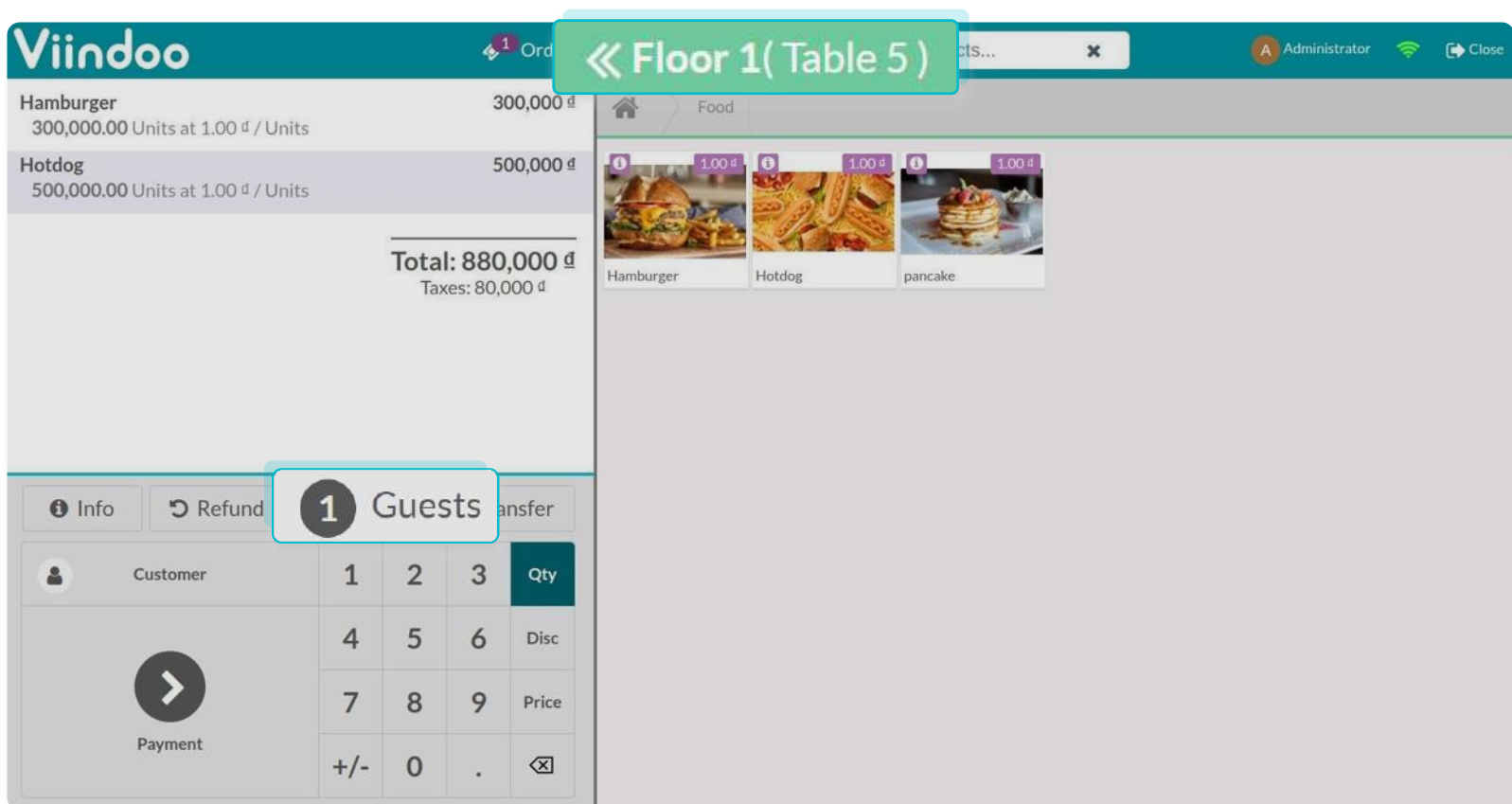
To create menus for your restaurant, follow the steps in [Create and Categorize POS products \(Page 82\)](#).

## Receive orders

### Select a table

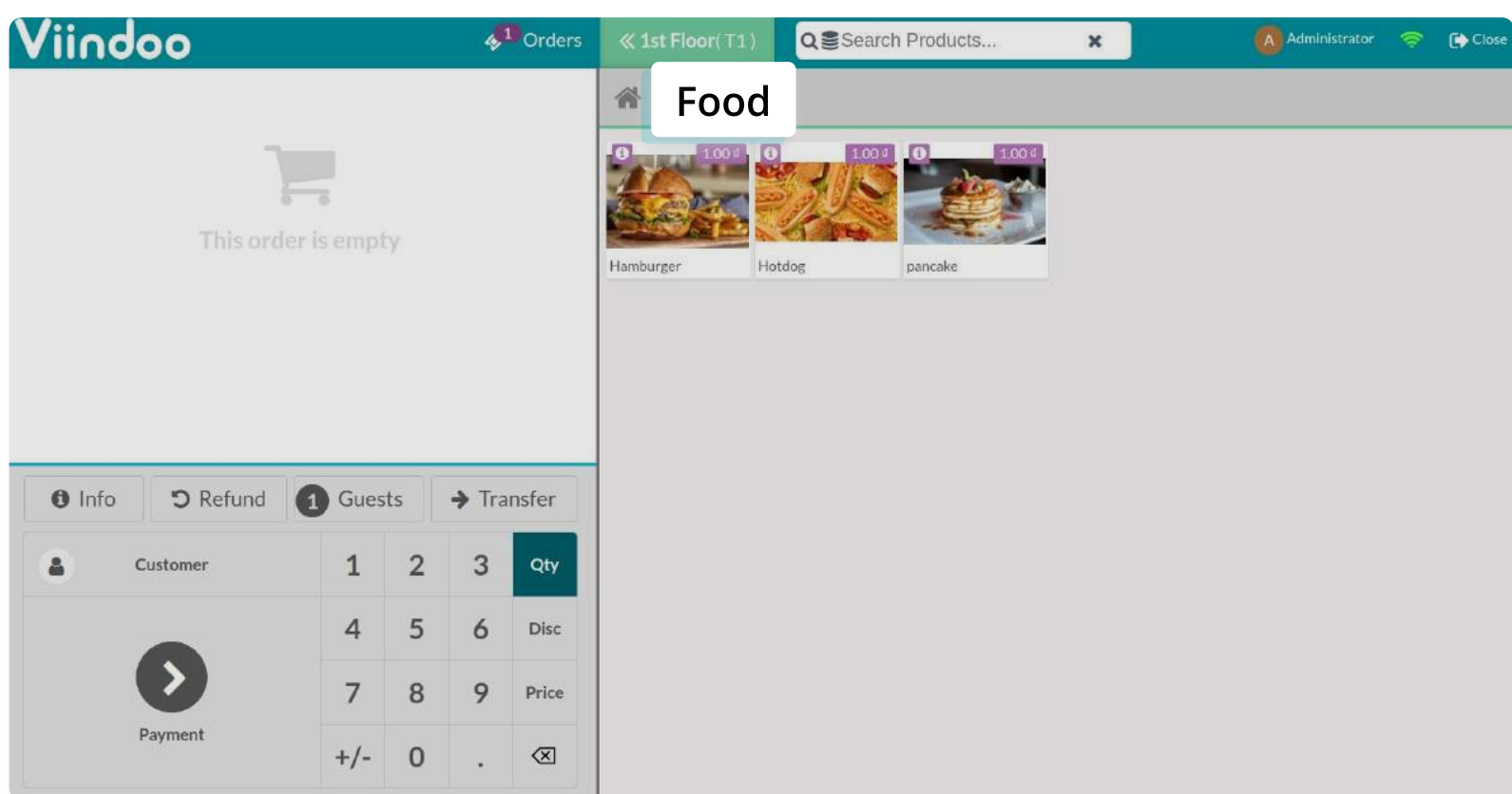
After [logging in to the sale session \(Page 83\)](#), the waiter will be redirected to the restaurant layout to select the table where the customer will be sitting.

The system will navigate you to the order interface, with the table number displayed at the top of the screen. Press the Guests button to enter the number of guests sitting at each table.



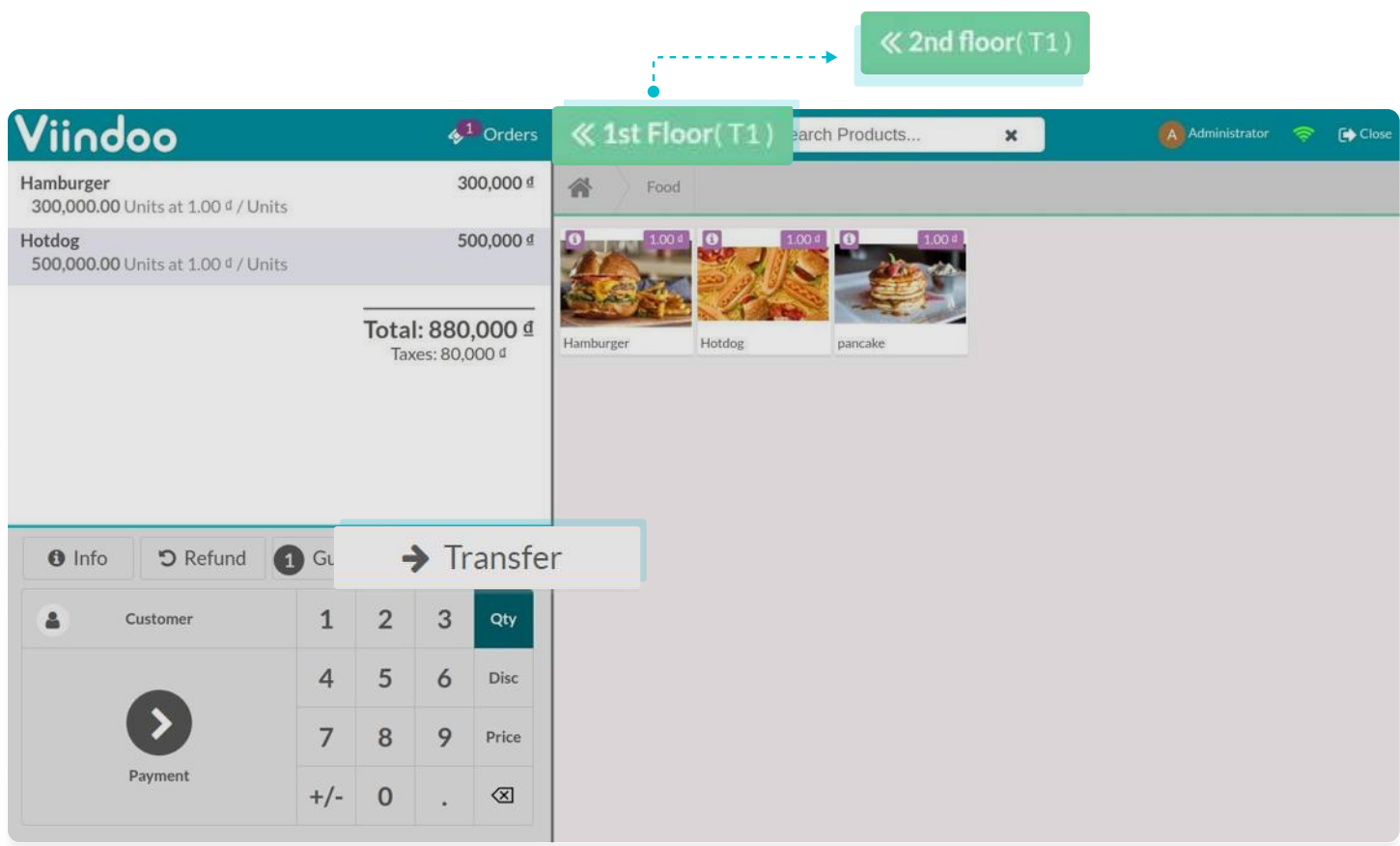
## Taking orders

Then, the waiter will proceed to select the items according to the customer's needs. You can click on the **PoS Product Categories** to quickly find the desired product to order.



Change table

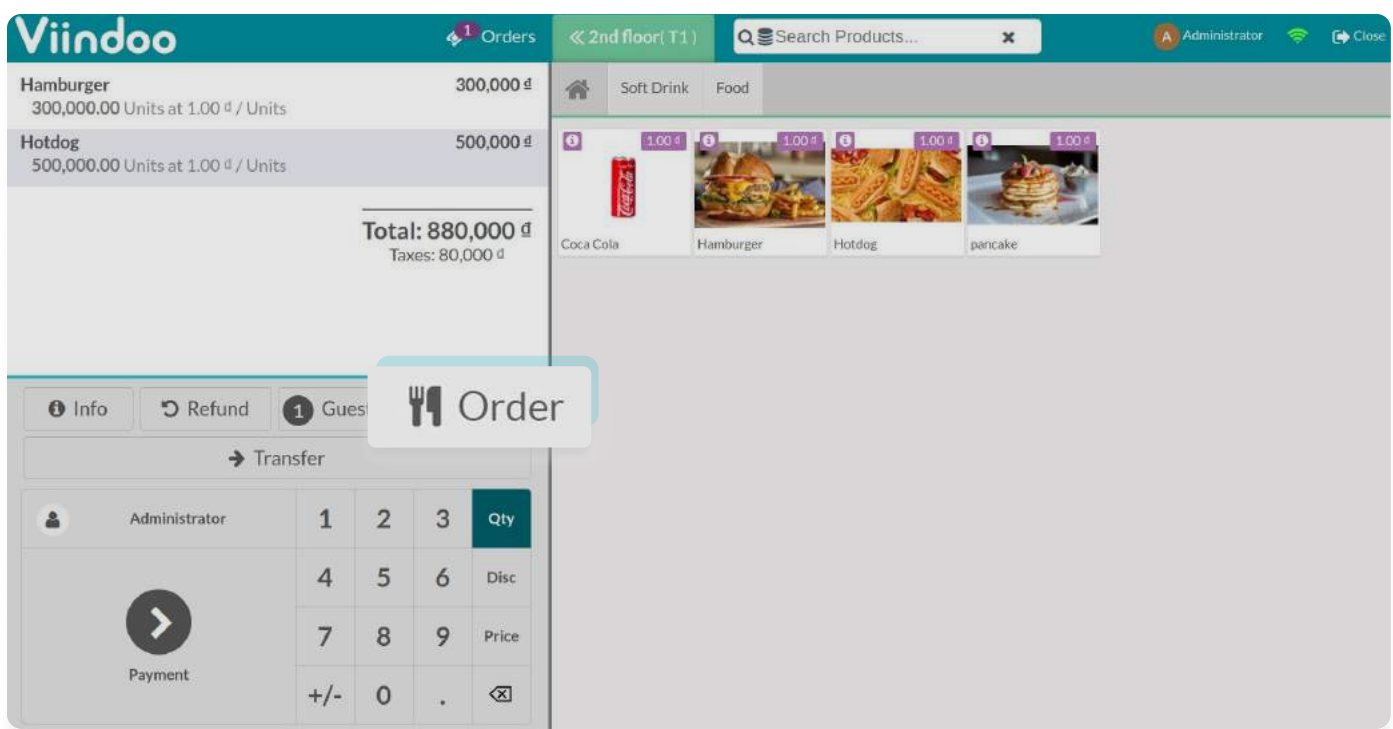
In case the customer wants to change the table, you can directly transfer the table on the order interface by clicking on the **Transfer** button and selecting the table the customer wants to move to.



After transferring, the customer's order is moved to the new table.

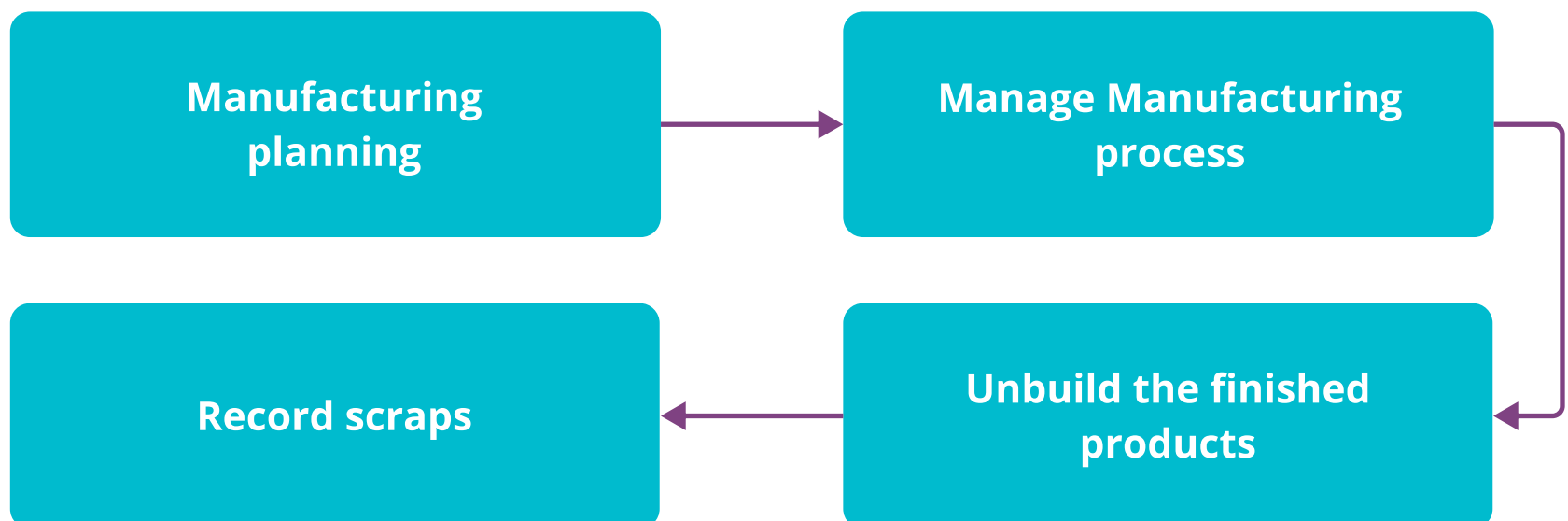
Send the order to the kitchen/bar

After finishing taking the order, press **Order** to send the order to the kitchen/bar.



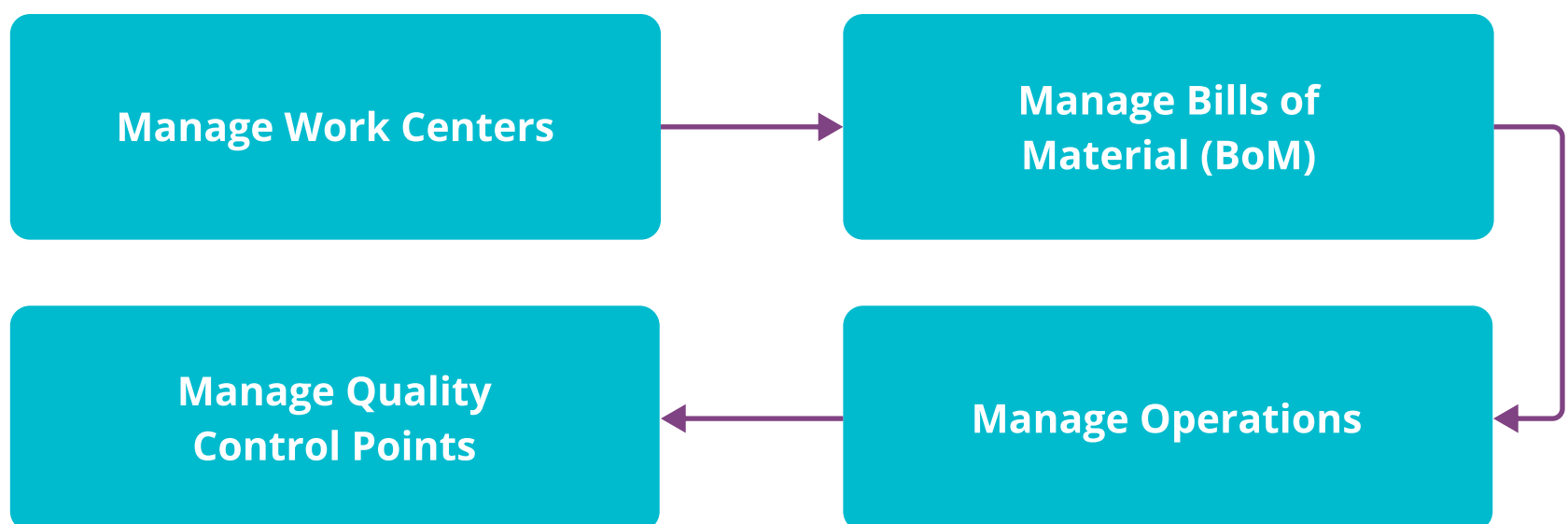
When the customer wants to pay, you can proceed with [recording the payment \(Page 86\)](#), [issuing the invoice \(Page 87\)](#) and at the end of the session, you can [close the session \(Page 89\)](#).

## MANUFACTURING MANAGEMENT



## MANUFACTURING PLANNING

Manufacturing planning is the process of building the manufacturing plan, based on the available resources to decide what to produce, when to produce, and to manage changes related to product demand. This planning is usually done by production planning managers.

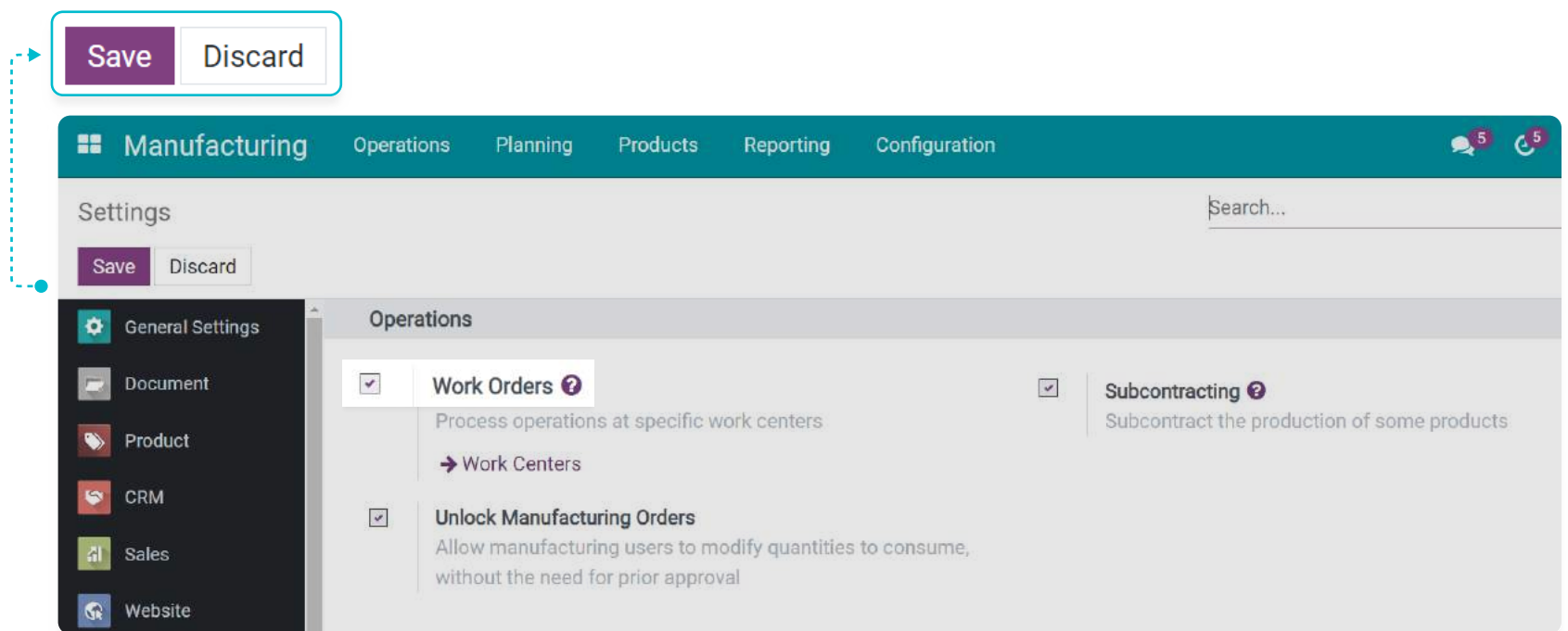


### Set up Work Centers

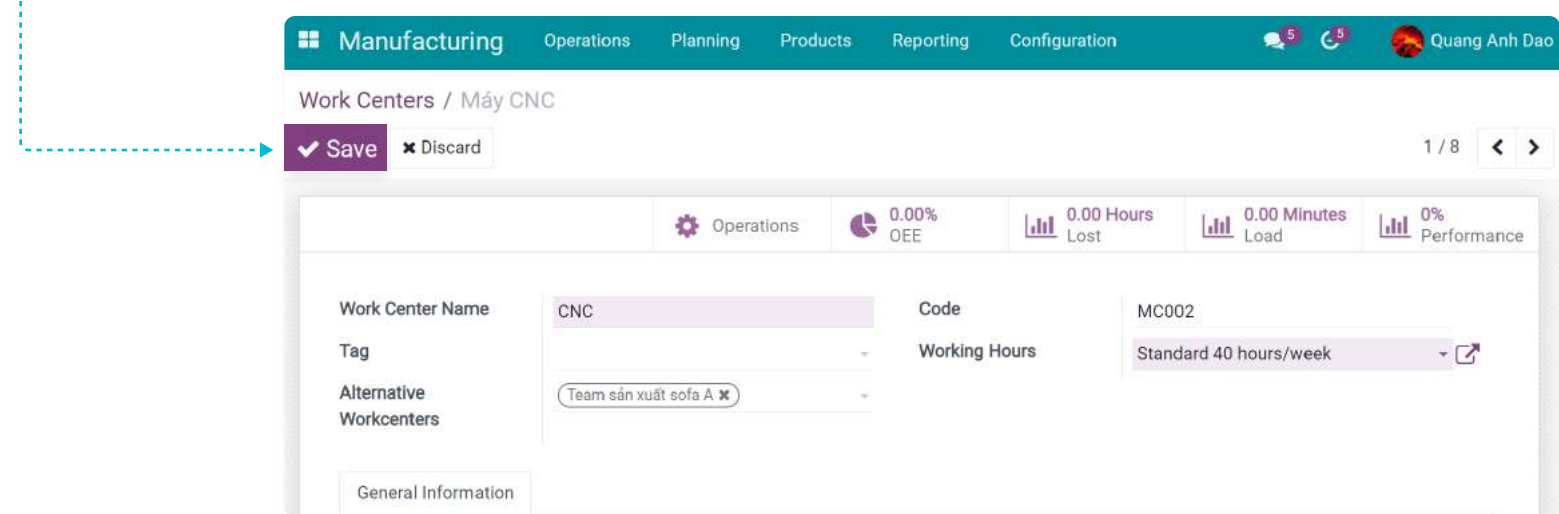
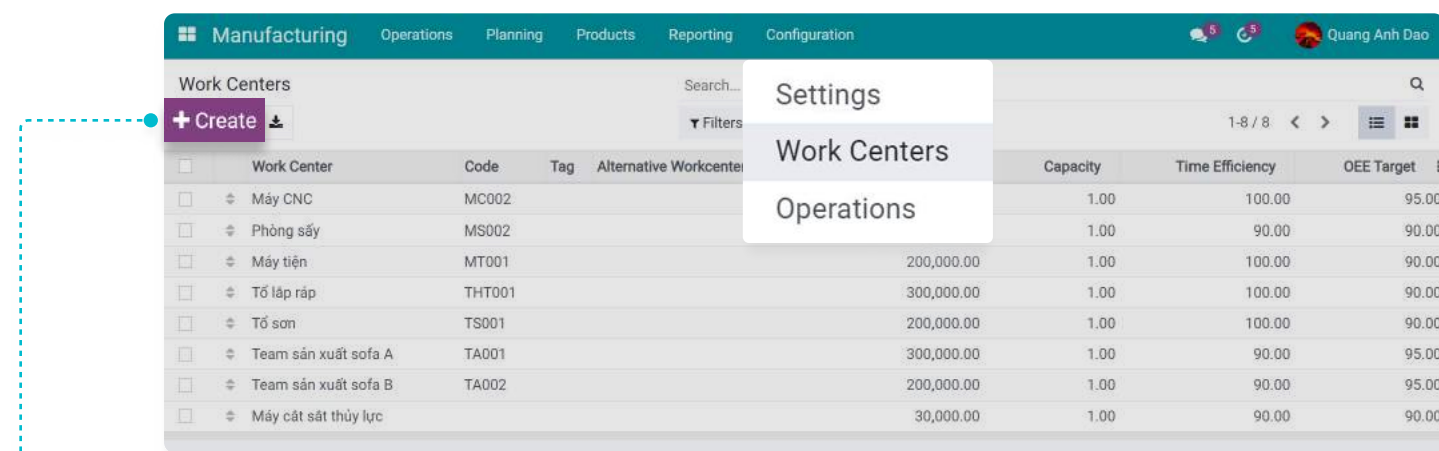
Work Centers represent the production units capable of transforming raw materials into semi-finished or finished products. This can be a group of people and/or machines used during production.

To manage work centers, you need to activate the Work Orders feature by navigating to **Manufacturing** ► **Configuration** ► **Settings** ► **Work Orders**. Then press **Save** to finish the initial settings.





To create a new work center, navigate to **Manufacturing** ▶ **Configuration** ▶ **Work Centers**, and press **Create**.



From here, add basic information of a work center, including:

- *Work Center Name*: The name of the work center.
- *Working Hours*: The work schedule of this work center, which will be used as the base for production planning.

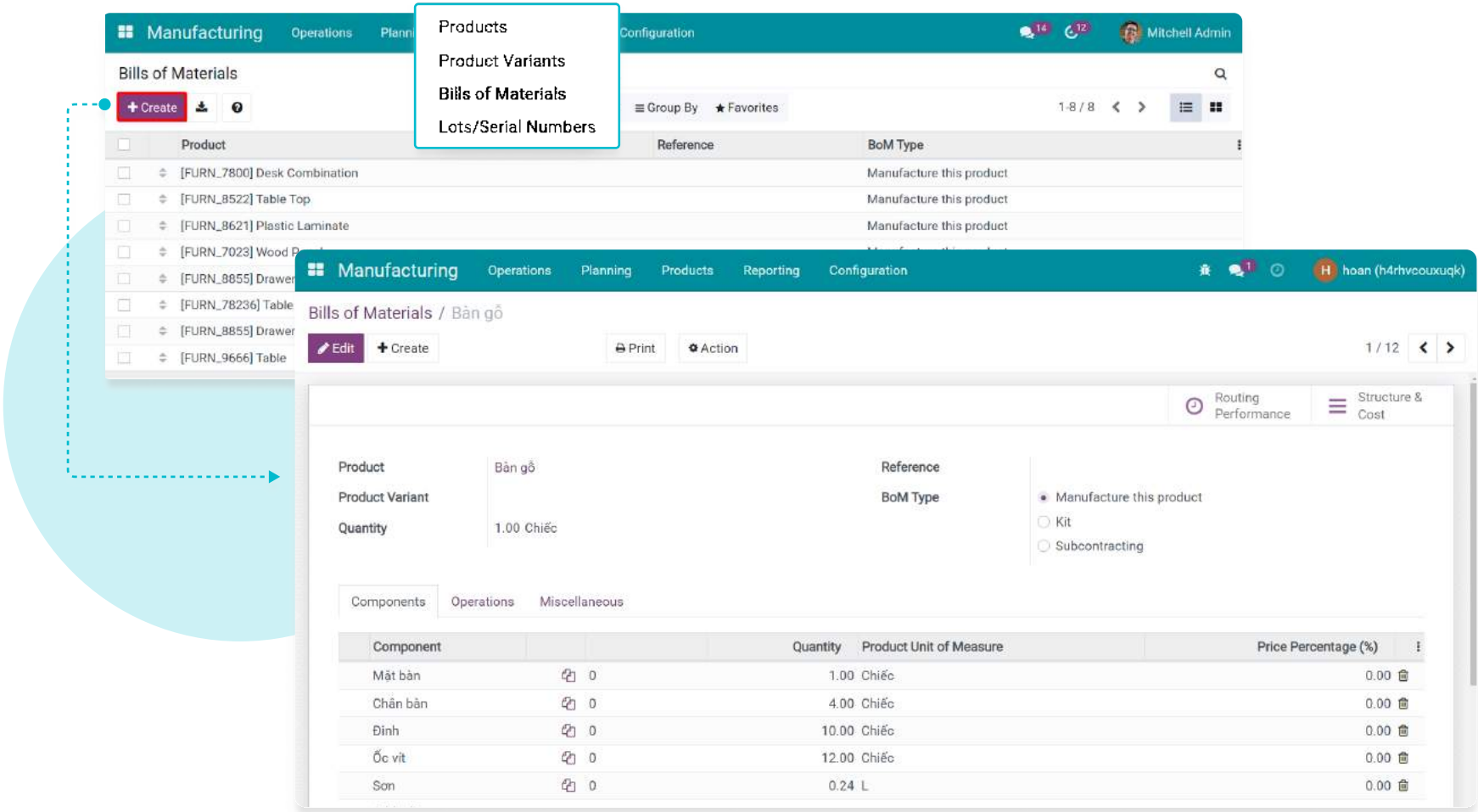
On the other hand, you can add production and cost-related information for each work center such as *Time Efficiency*, *Capacity*, *OEE Target*, etc. then press **Save**.

➔ See details at:

- *Manage Manufacturing process in Viindoo.*

### Create a Bill of Materials (BoM)

Navigate to **Manufacturing** ► **Products** ► **Bills of Materials** and press **Create**.



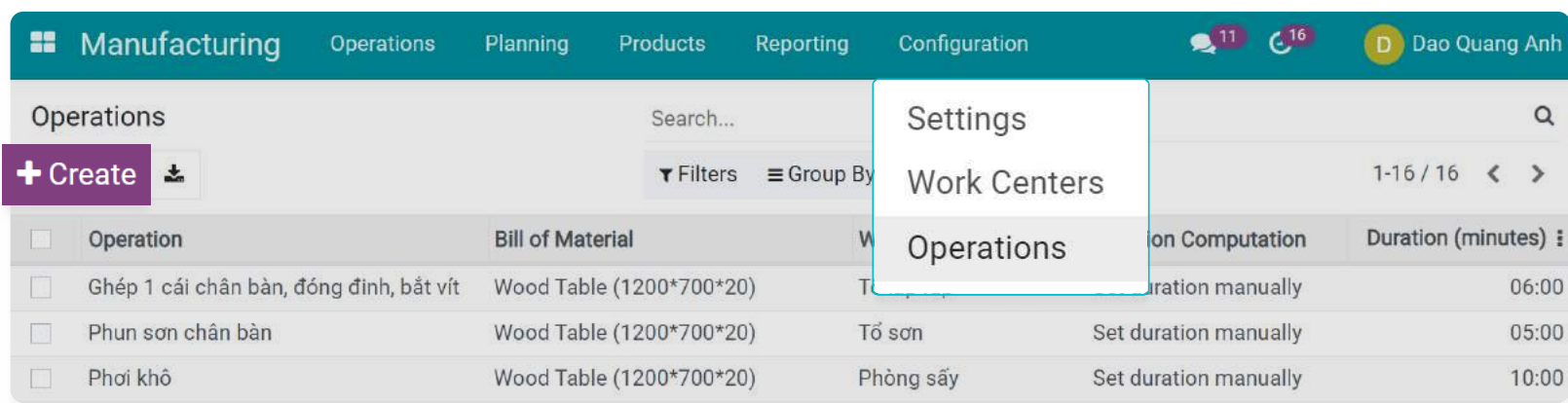
Add the following information for the Bill of Material:

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

Then press **Save**.

### Set up Operations

Manufacturing operations are specific actions occurring during a manufacturing process such as cutting wood, grinding wood, assembling, etc. To create a new operation, navigate to **Manufacturing** ► **Configuration** ► **Operations**, and press **Create**.



Add the following information:

- *General information:*
  - *Operation:* Name of this operation.
  - *Bill of Material:* Select the bill of material that this operation will be applied to.
  - *Work Center:* The work center that will perform this operation.
  - *Duration Computation:* Select the calculation method for the duration of this operation:
    - ◆ *Compute based on tracked time:* If chosen, the system will calculate the operation duration based on the average time of completed manufacturing orders in the past.
    - ◆ *Set duration manually:* Select this option when you want to set up the expected time for this operation.
- *Work Sheet tab:*
  - *Work Sheet:* Upload the worksheets and documentation for this production.

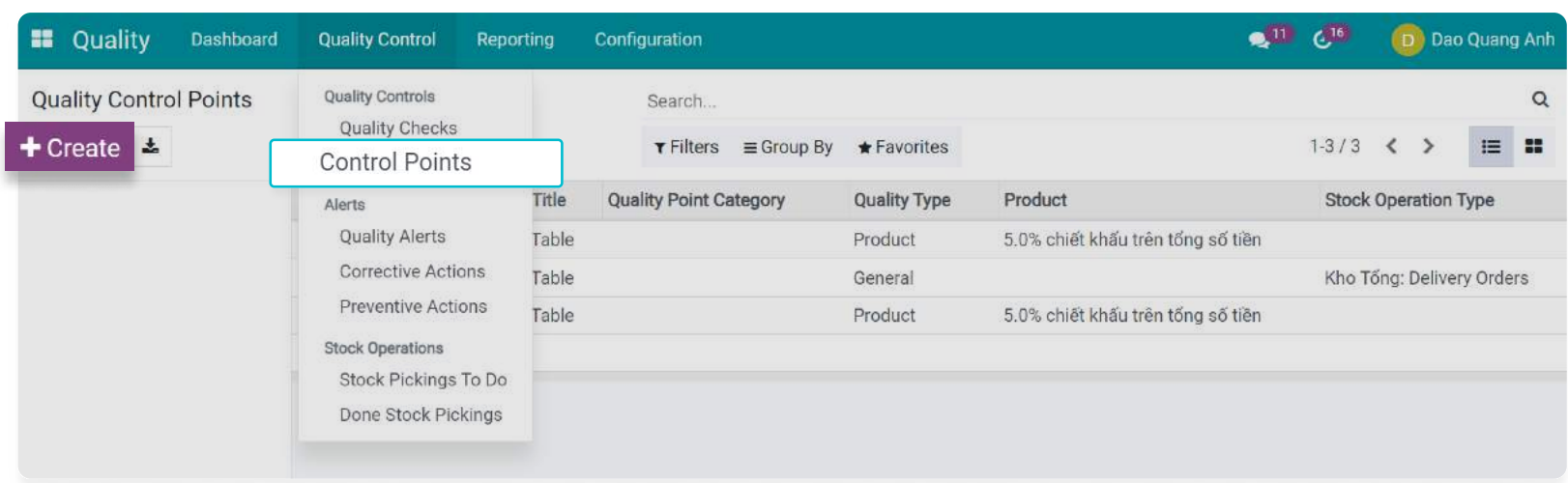
The screenshot shows the 'Operations / New' configuration form. The top navigation bar includes 'Manufacturing', 'Operations', 'Planning', 'Products', 'Reporting', and 'Configuration'. The 'Operations / New' header is visible. Below the header, there are 'Save' and 'Discard' buttons. The form contains several fields: 'Operation' (Cutting Wood), 'Bill of Material' (Table), 'Work Center' (Cutting Machine), and 'Apply on Variants'. The 'Duration Computation' section has two radio buttons: 'Compute based on tracked time' and 'Set duration manually' (selected). The 'Default Duration' is set to '60:00 minutes'. The 'Work Sheet' section has a 'Work Sheet' button and three radio buttons: 'PDF', 'Google Slide', and 'Text' (selected).

Press **Save** to complete the configuration.

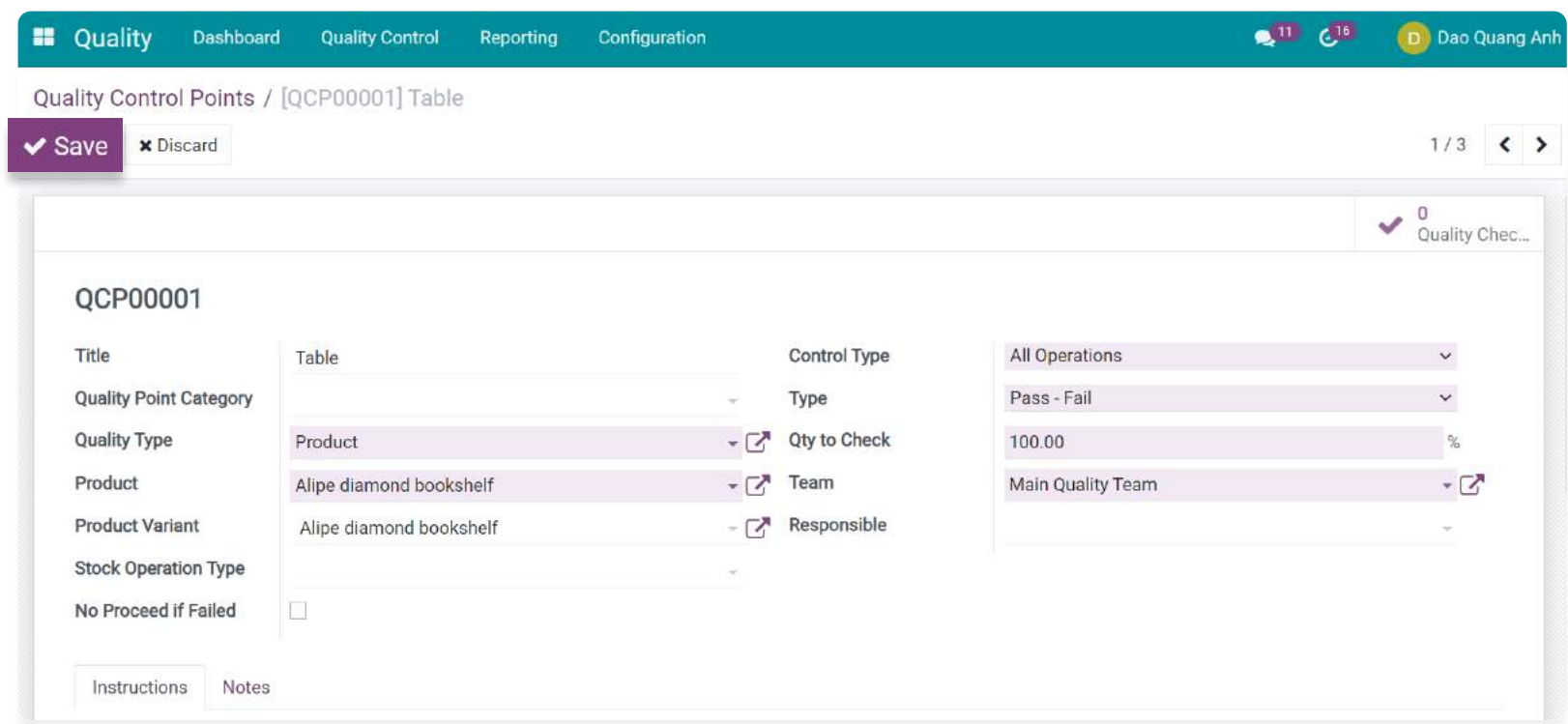
## Set up Quality Control Points

In manufacturing, quality control is the process of evaluating and checking to ensure that the output product meets the requirements. Normally, each manufacturer will have their own quality management team in charge of developing criteria, quality control procedures, and performing quality control of input materials and finished products.

To set up quality control points, navigate to **Quality ▸ Quality Control ▸ Control Points** and press **Create**.



Add detailed information for each quality control point:



These control points will be applied during each step of the manufacturing process such as checking the quality of input materials, output finished products, incoming products from the subcontractors, production processes, etc.

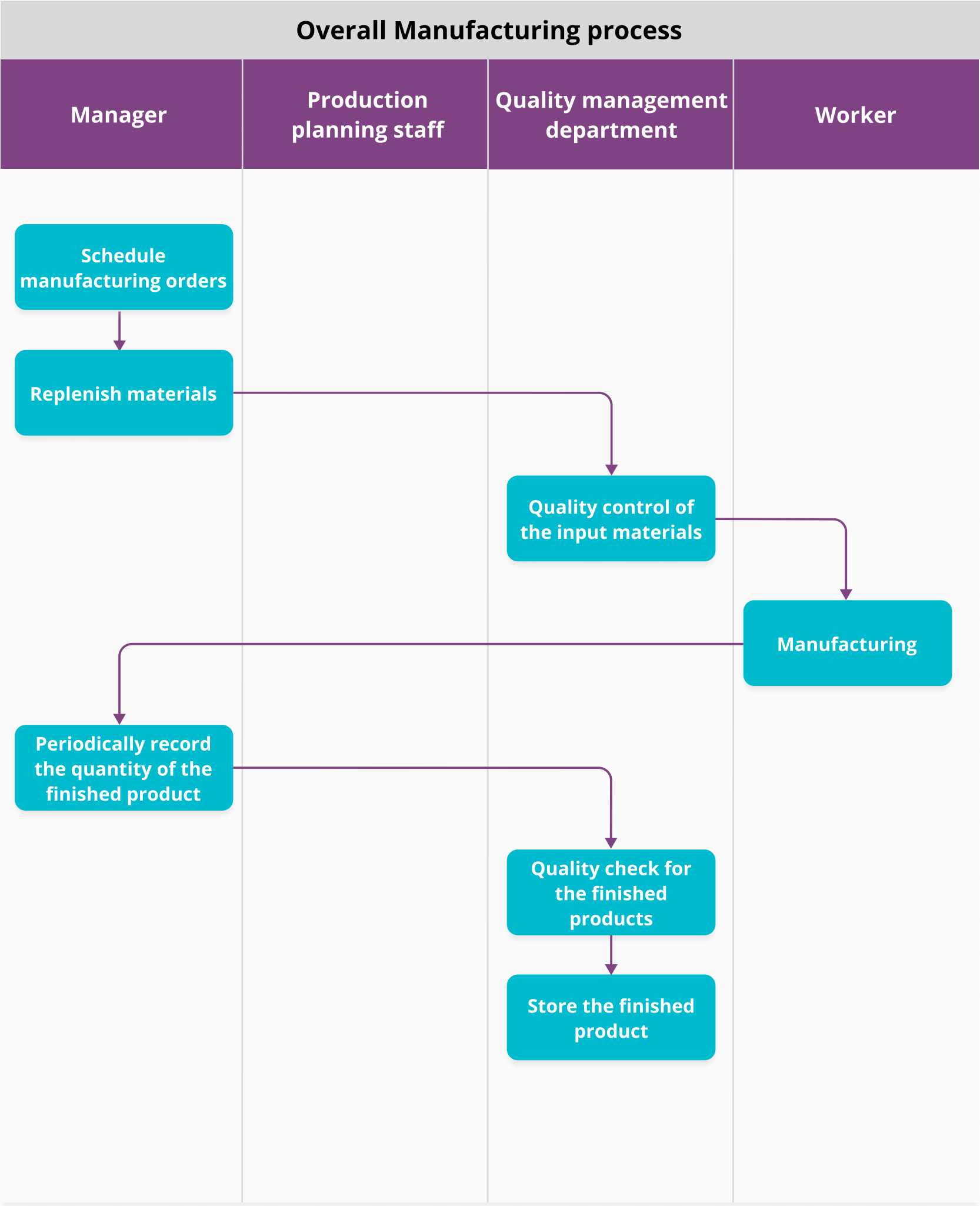
- ➔ See details at:
- [\*How to create Control Points.\*](#)



MANAGE MANUFACTURING PROCESS

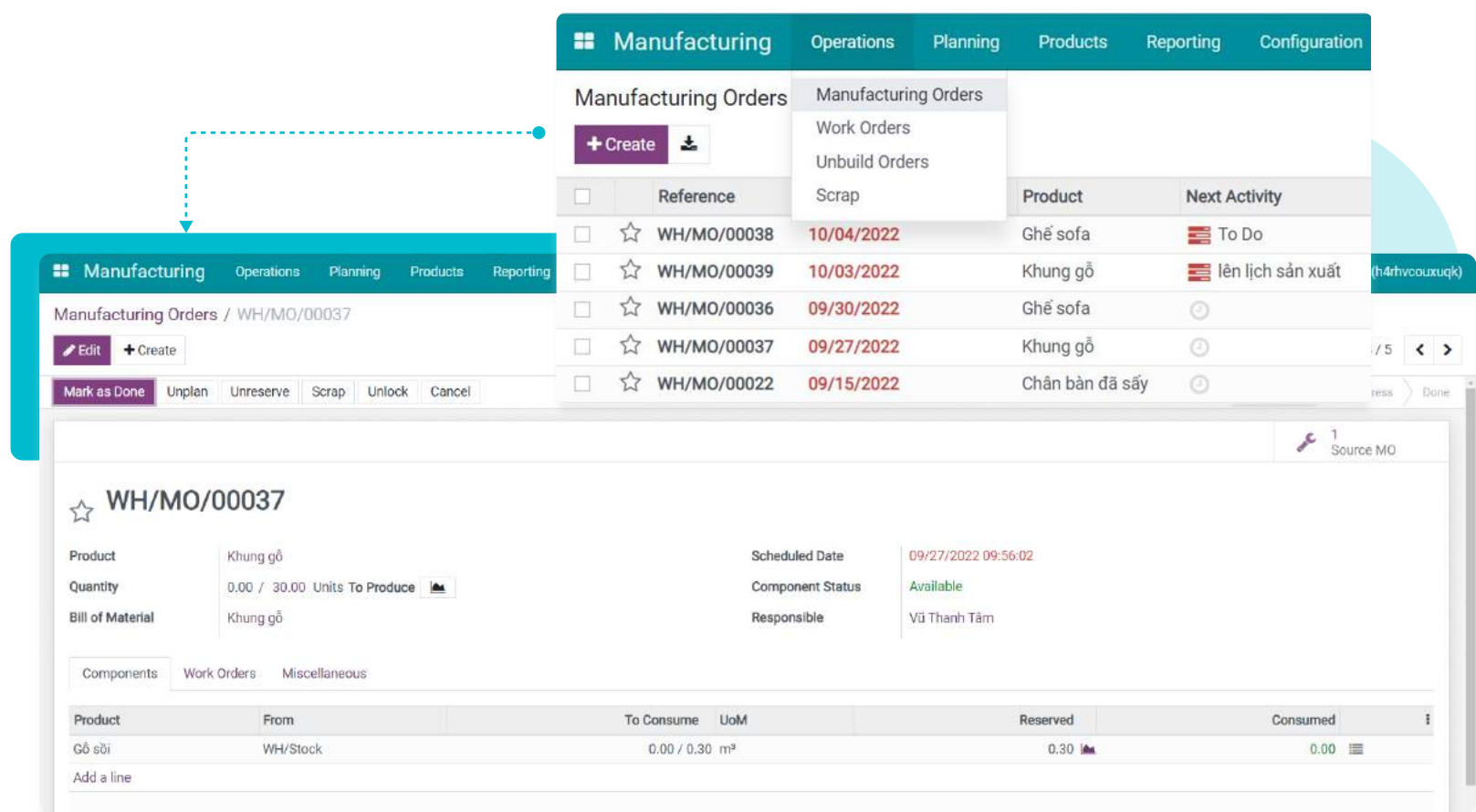
Manufacturing processes in businesses are usually managed by manufacturing managers.

Overall manufacturing process



## Schedule manufacturing orders

Navigate to **Manufacturing** ▶ **Operations** ▶ **Manufacturing Orders** and press **Create** to start creating a new manufacturing order.

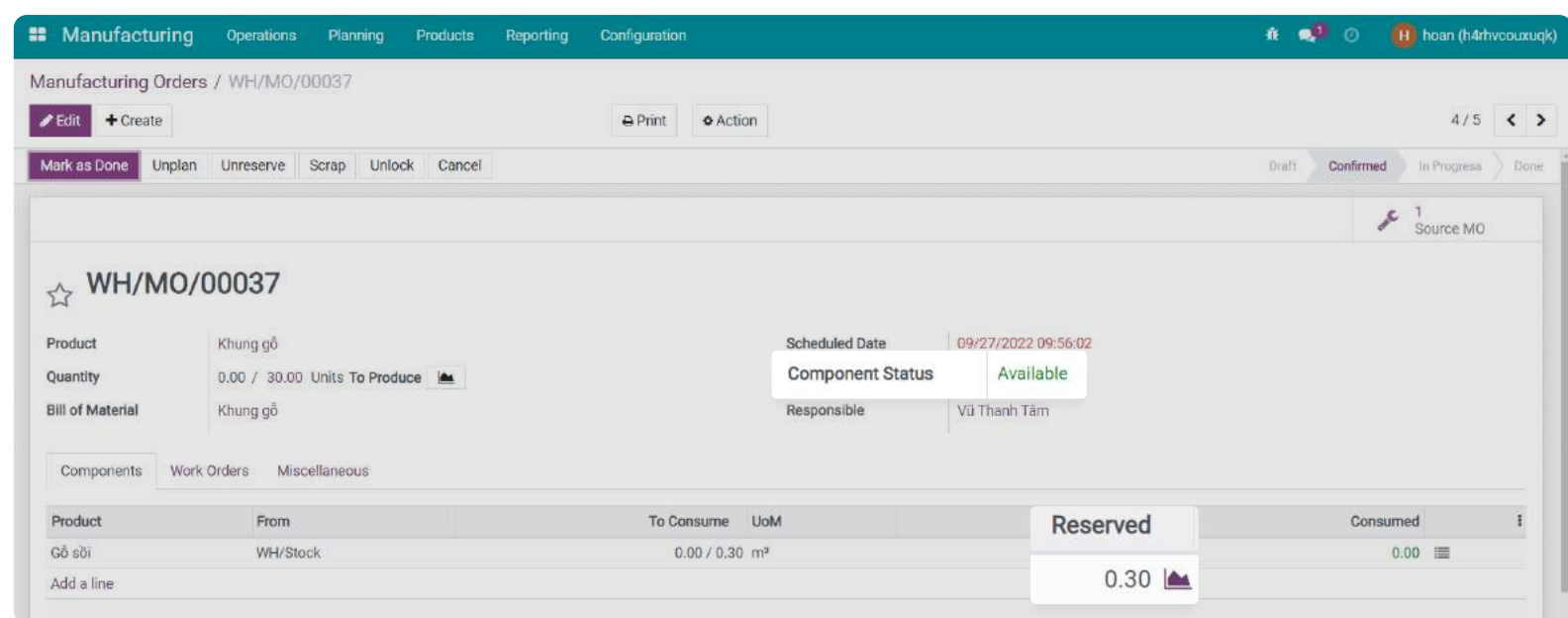


Select the product to be manufactured, add the quantity, and schedule the expected production date in the **Scheduled Date** field, the rest of the information will be automatically added based on the pre-configured BoM.

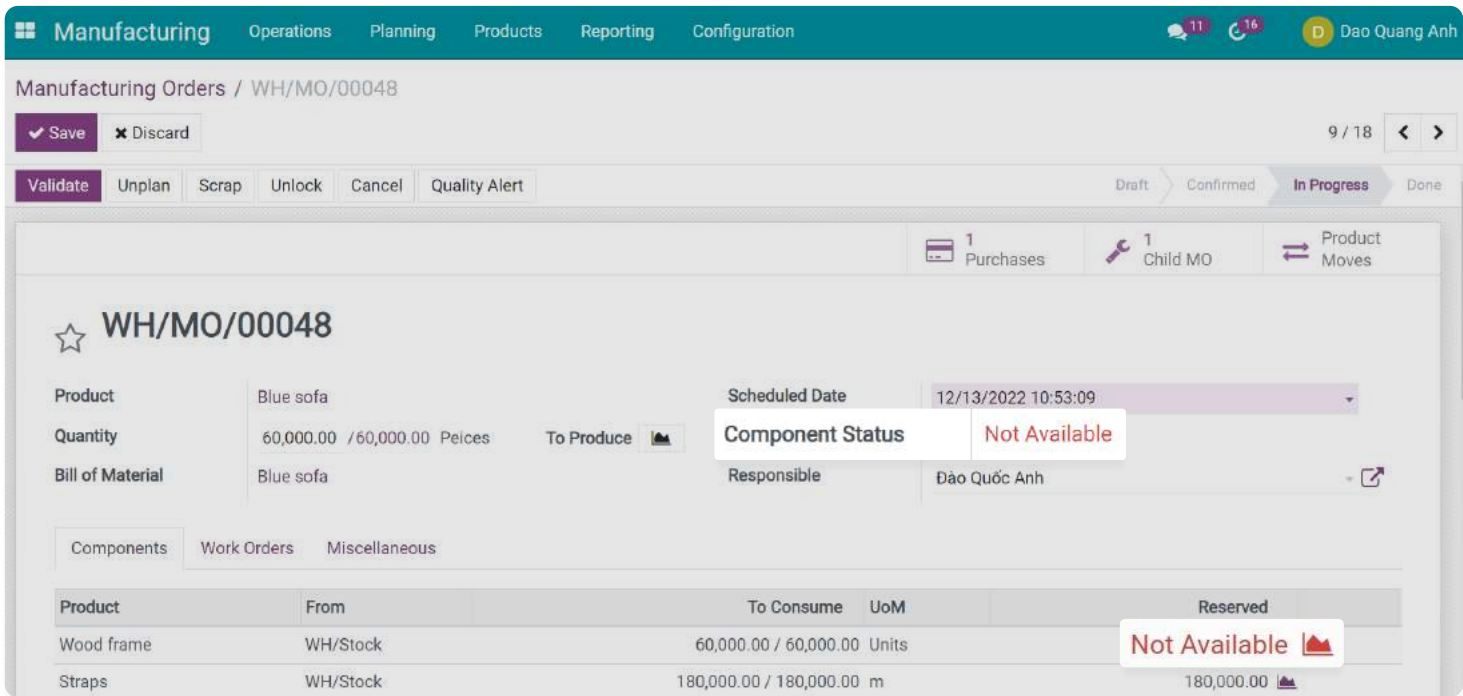
Check the manufacturing order information and press **Save** to finish manufacturing planning.

## Replenish materials

Once a manufacturing order is confirmed, the system automatically checks the inventory of the required materials and reserves them for the order.

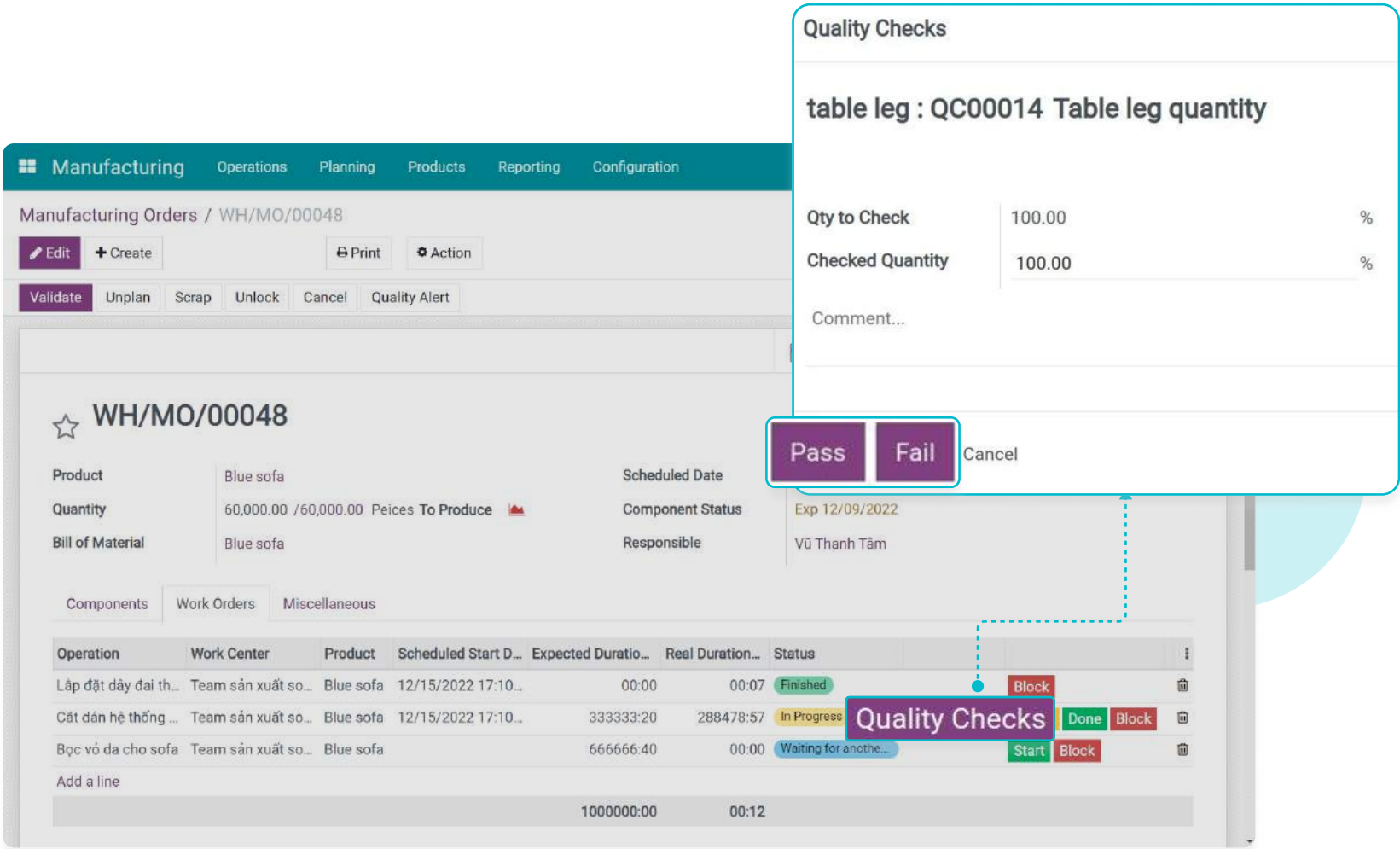


If there is not enough stock for the required materials, a warning will be displayed on the manufacturing order. The personnel in charge can take that into consideration to plan for the procurement of necessary materials.



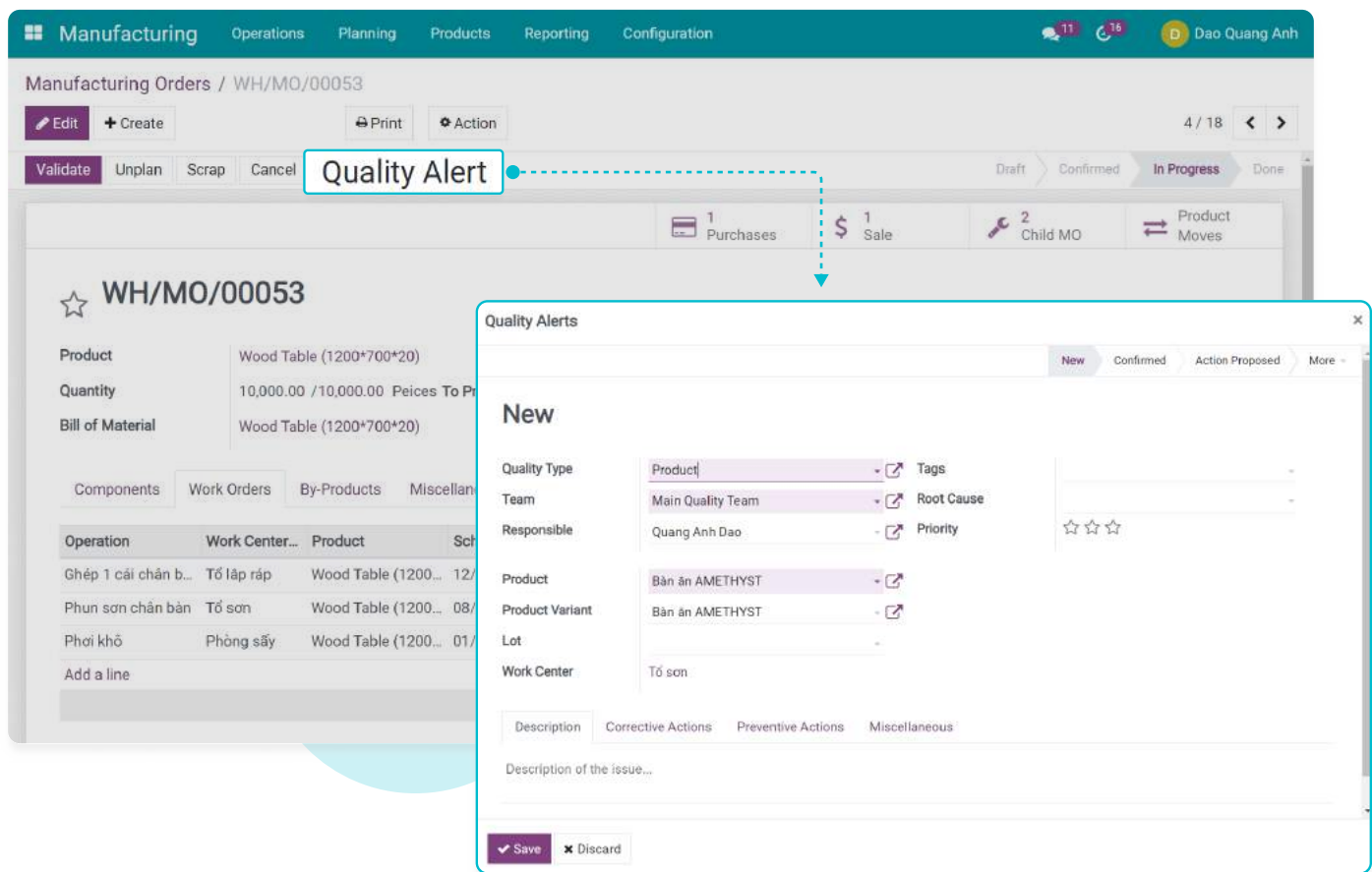
Quality control of the input materials

Before the manufacturing process begins, quality control employees can check the quality of the materials by going to the **Work Orders** tab on the manufacturing order and clicking the **Quality Checks** button on each line.



On the **Quality Checks** window, you can proceed with the quality inspection and note down the results.

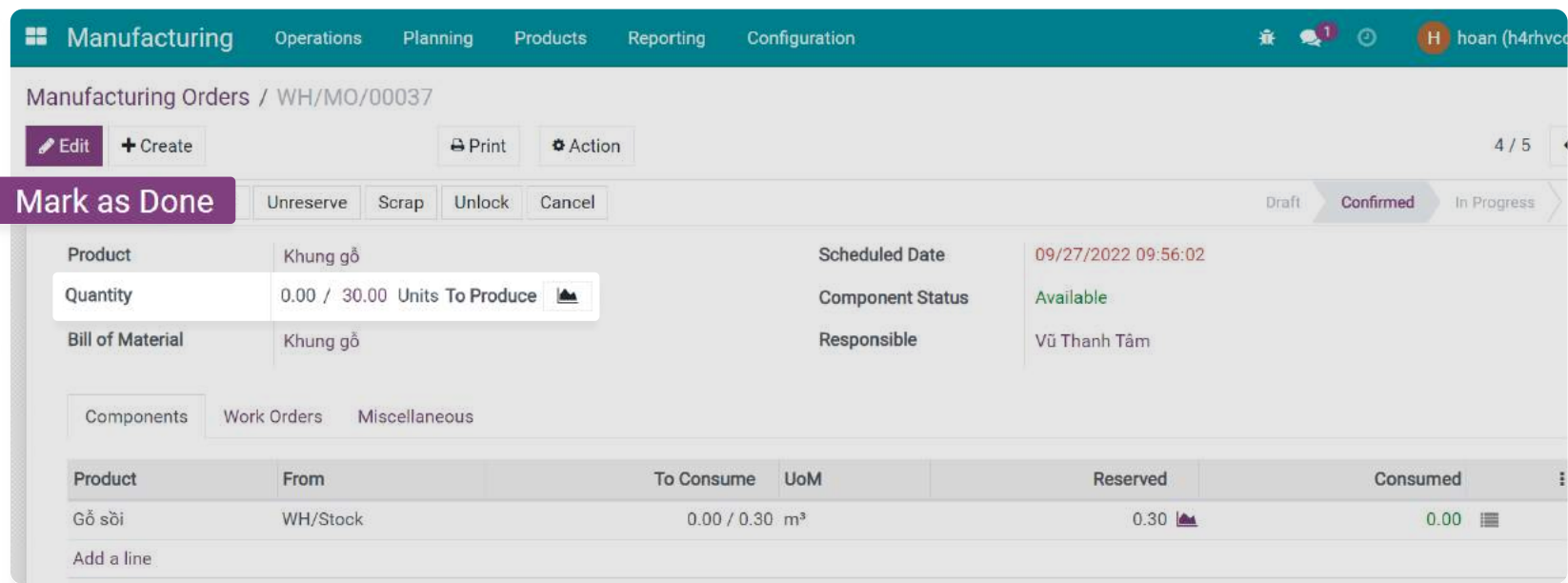
In case the materials do not meet the quality control requirements, you can press the **Quality Alert** button on the manufacturing order to create an alert and plan to fix the errors.



- ➔ See details at:
- [Create Quality Alerts.](#)

*Periodically record the quantity of the finished product*

During the manufacturing process, you can update the finished quantity periodically by pressing **Edit** and entering the actually completed quantity.

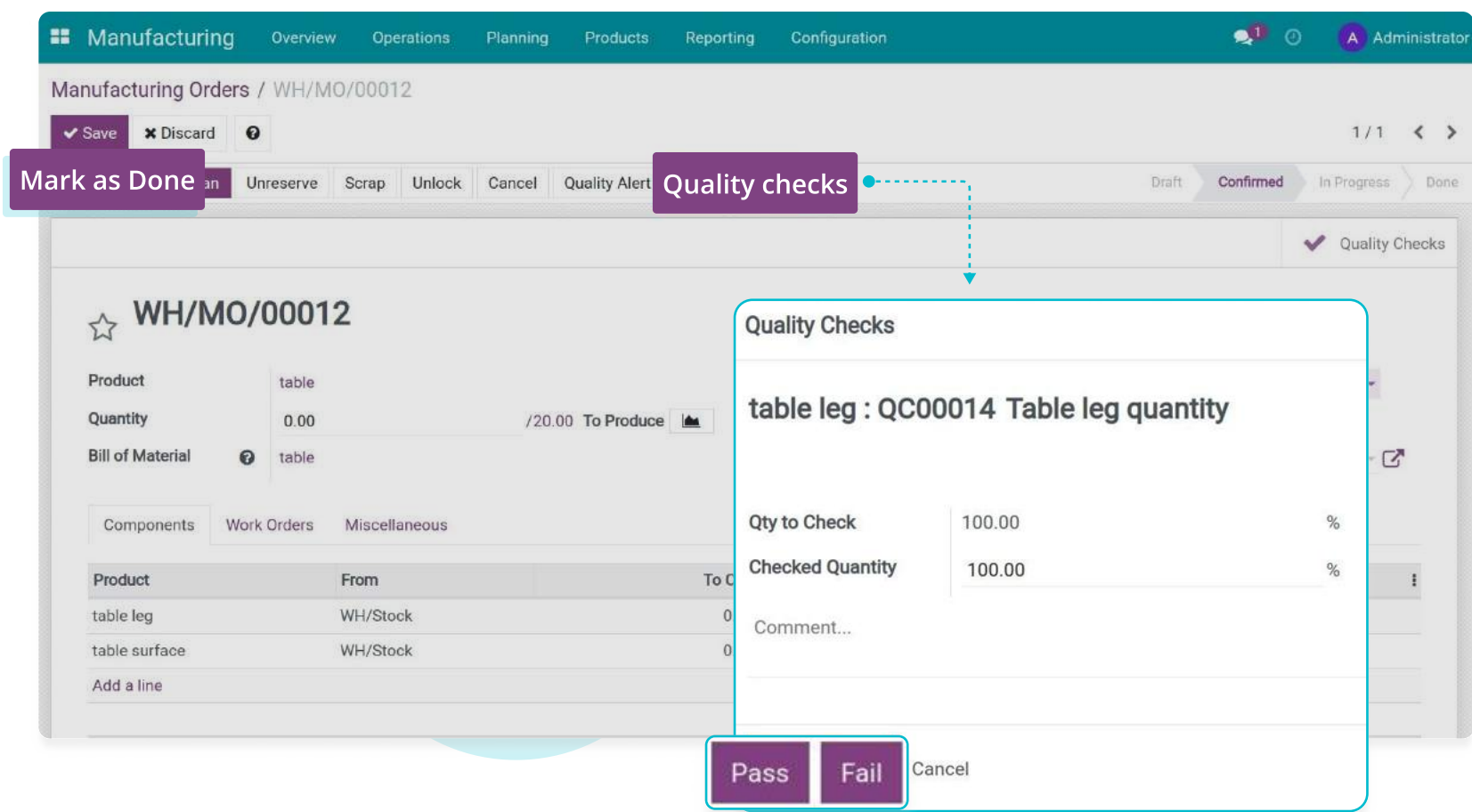


In the case of mass production and recording the finished products at the same time, you can skip the quantity recording step above and press **Mark as Done** on the manufacturing order to record the final quantity.



Quality check for the finished products

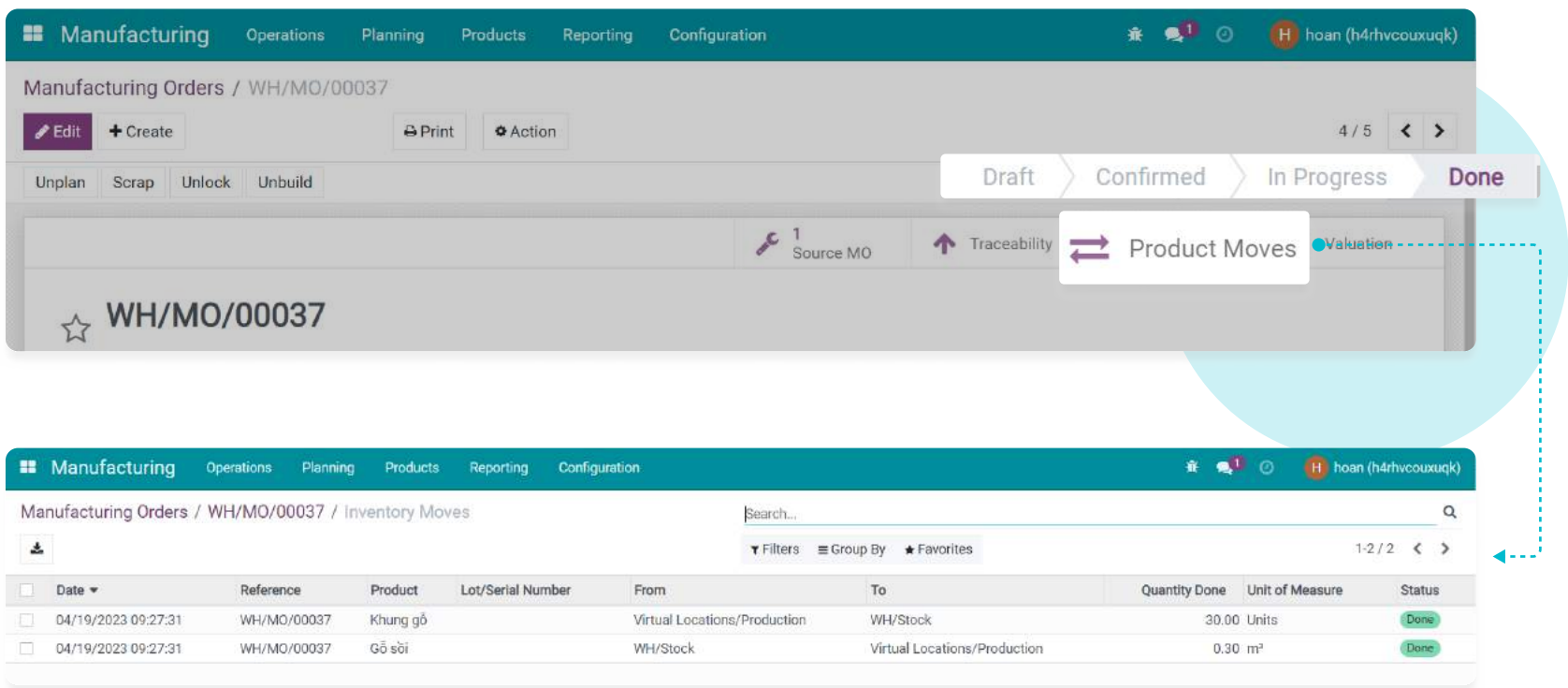
When the production is completed, the quality control staff can check the quality of the finished products before sending them to the warehouse by pressing the **Quality Checks** button on the manufacturing order.



After checking the quality of the finished product, press the **Validate** button to complete the manufacturing order.

Store the finished product

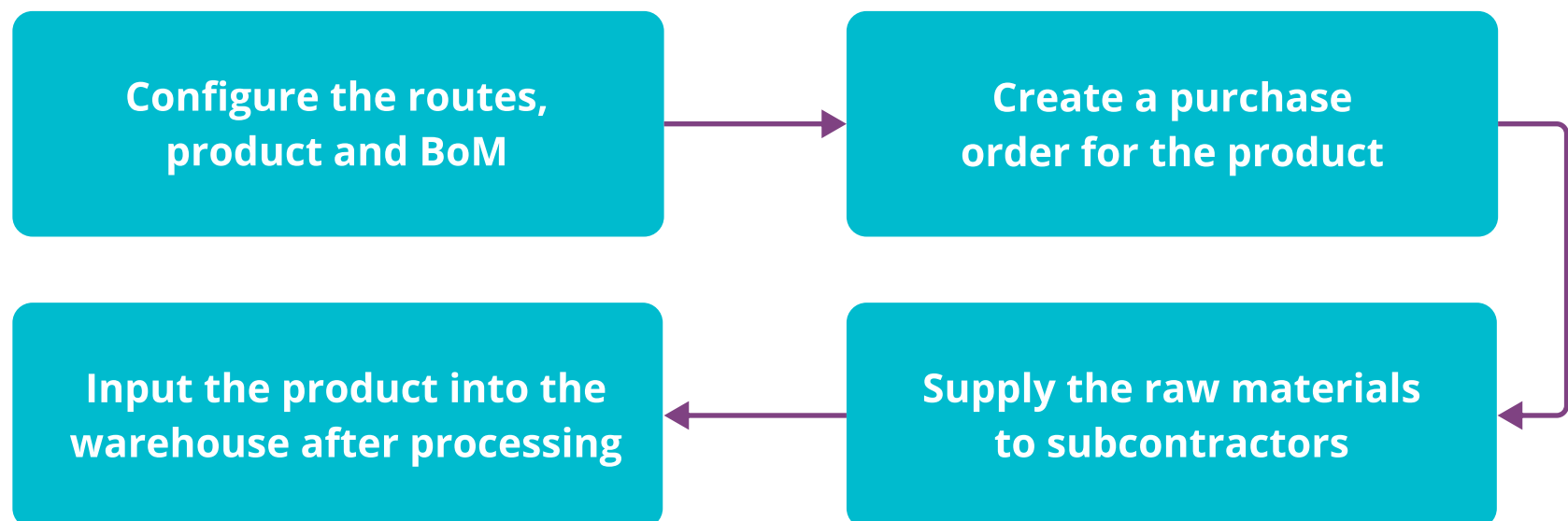
After completing the manufacturing order, inventory transfers are automatically created to record the newly-produced products and the consumption of raw materials. On the manufacturing order, press **Product Moves** to view.



## Subcontract management in manufacturing

The Subcontracting feature can be flexibly applied in manufacturing business models. For example, the business outsources one or some stages of the production process to a third party. These stages can vary from processing semi-finished products to finishing finished products, etc.

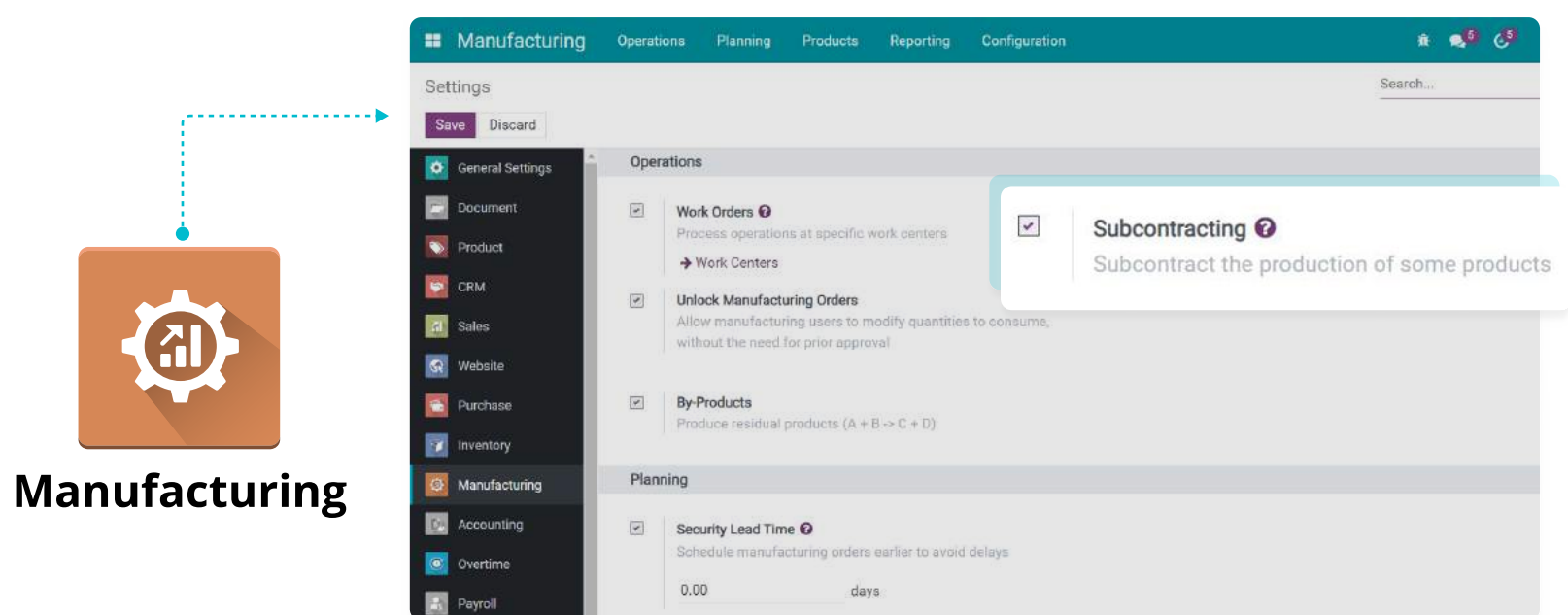
If your business wants to hire a subcontractor for a part of your production process, you need to do the followings:



### *Configure the supply chain routing, product, and BoM*

#### *Step 1: Activate the Subcontracting feature*

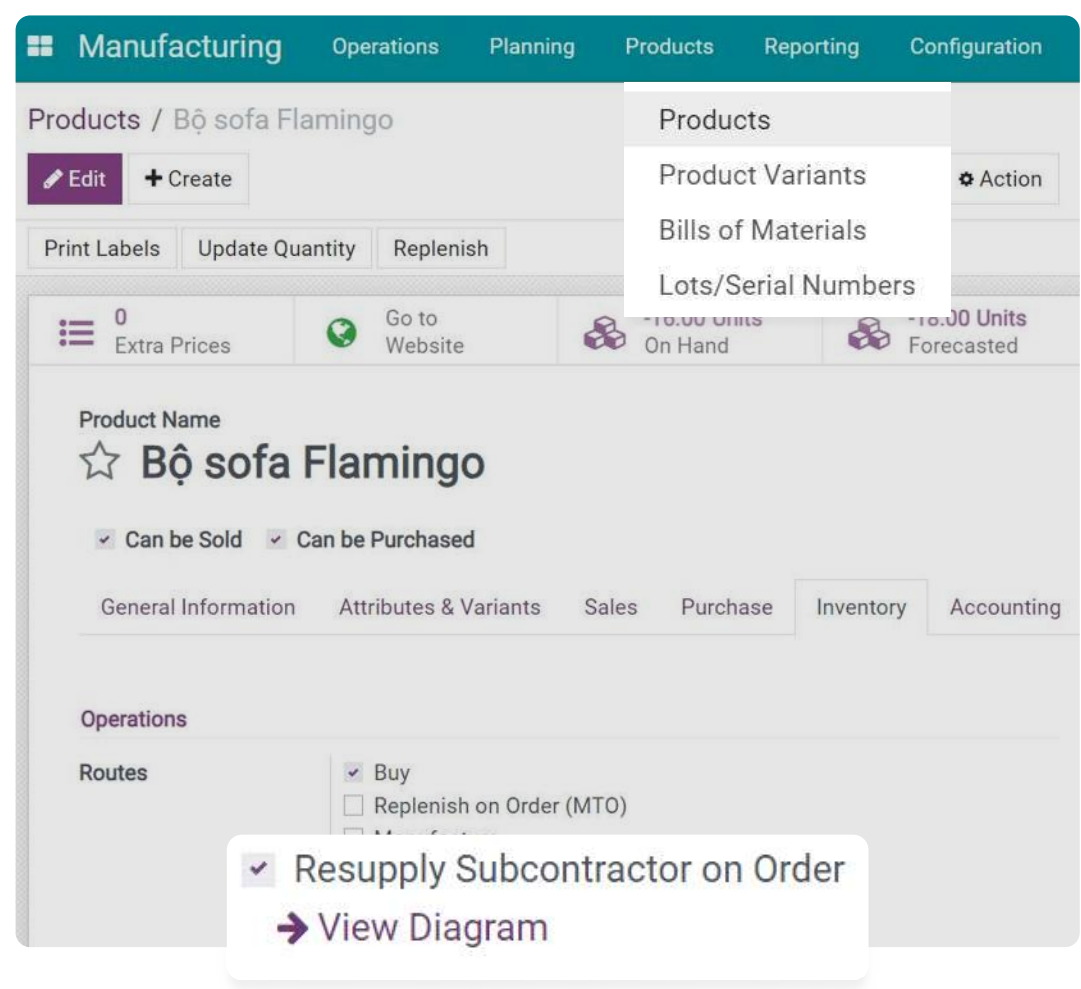
Navigate to **Manufacturing** ► **Configuration** ► **Settings**, at the **Operations** section, enable the **Subcontracting** feature.



Step 2: Configure the products manufactured by subcontractors

Navigate to **Manufacturing** ▶ **Products** ▶ **Products** and press **Create** to [create a product \(Page 32\)](#).

At the **Inventory** tab, select the **Resupply Subcontractor on Order** route.

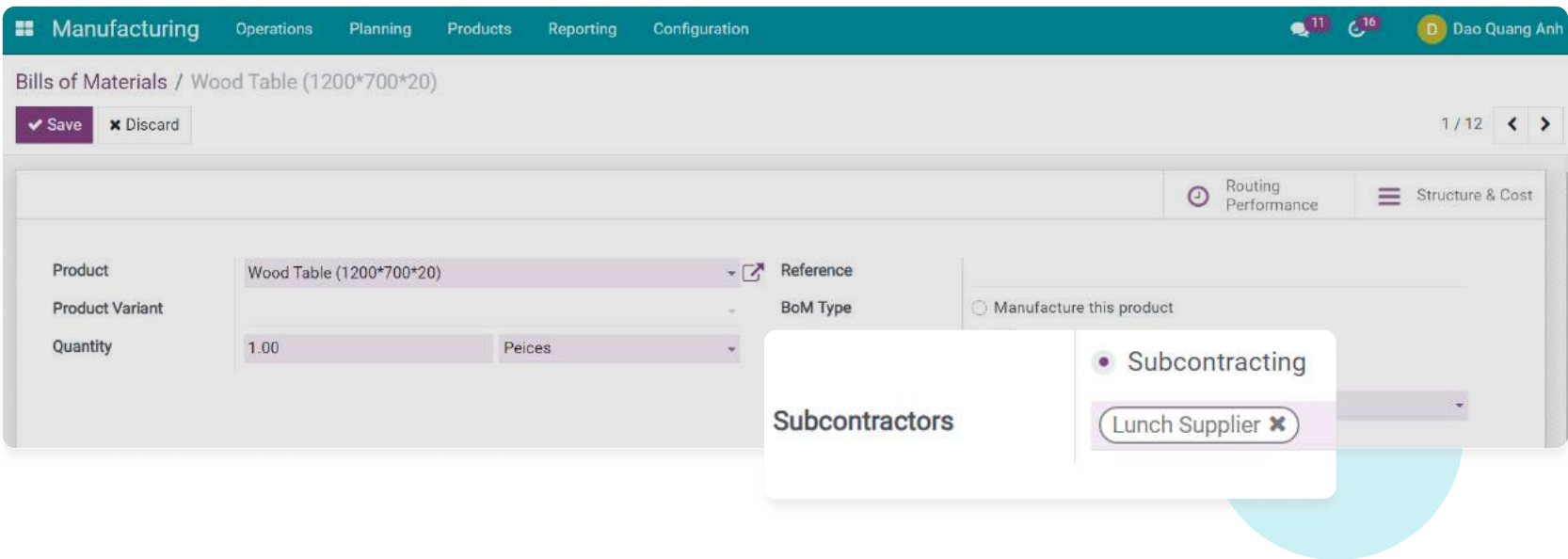


**Note**

The **Resupply Subcontractor on Order** should be enabled on both the finished product and the raw materials being sent to subcontractors.

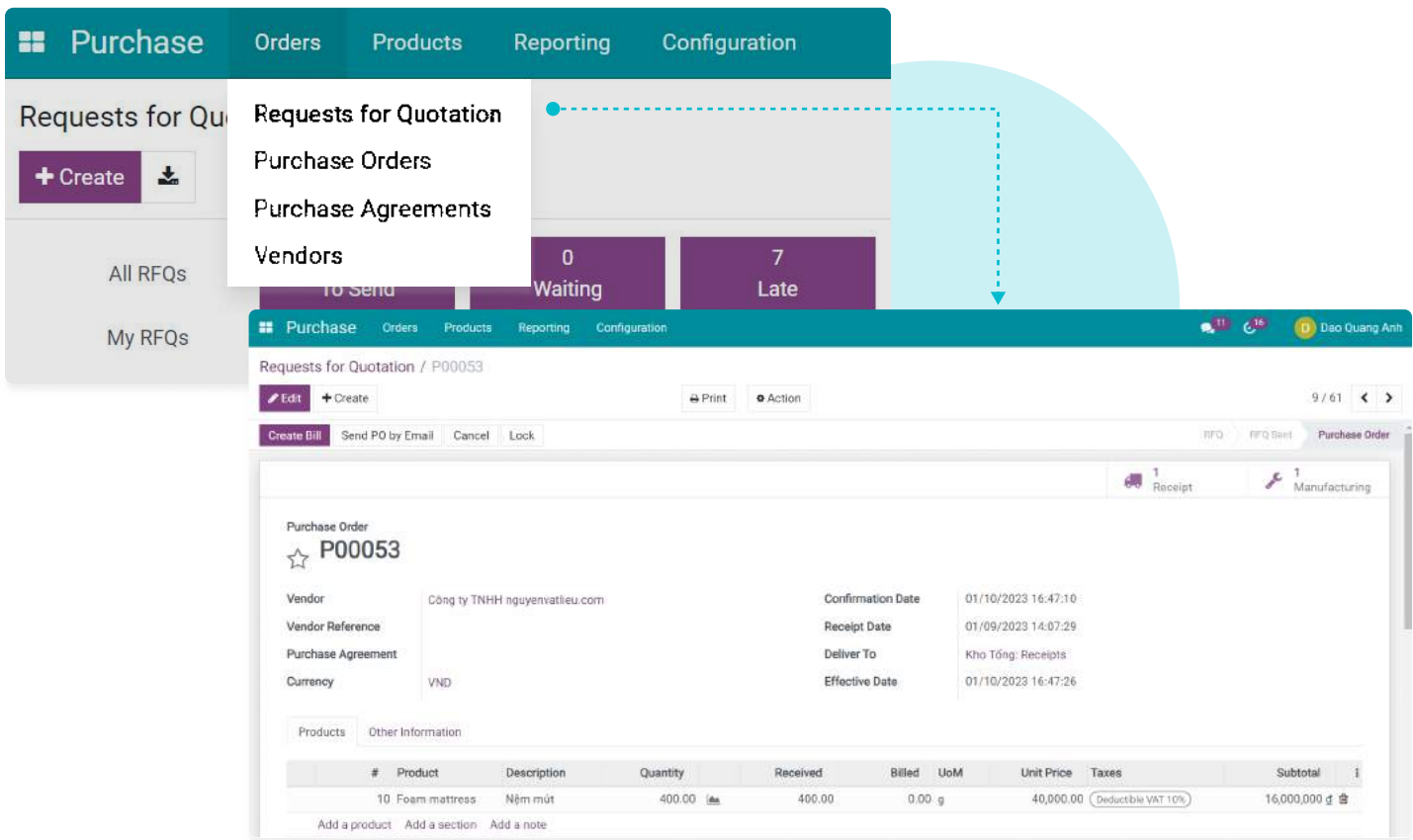
Step 3: Create Subcontracting BoM

[Create a BoM \(Page 98\)](#) with the **Subcontracting** BoM Type, select the subcontractors at the **Subcontractors** field and press **Save**.



Create a purchase order for the subcontracted product

Navigate to **Purchase** ▶ **Orders** ▶ **Requests for Quotation**, and press **Create** to create a purchase order for the subcontracting product.



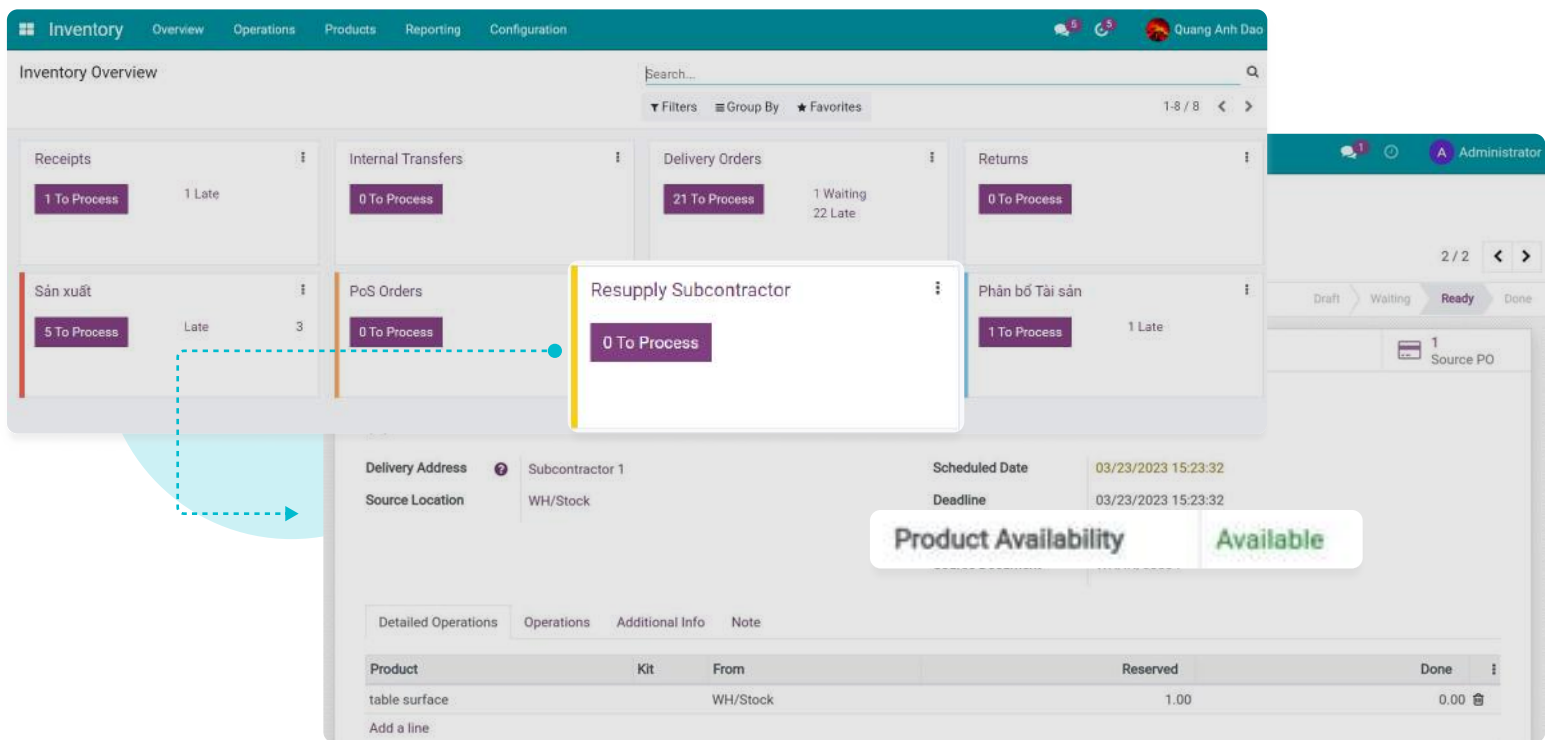
Add basic information to the request for quotation, including:

- *Vendor*: Select the subcontractor.
- *At the **Products** tab*: Select the subcontracting product.

After filling in the information, press **Save** and **Confirm Order**.

Send materials to subcontractors

Navigate to **Inventory** ▶ select **Resupply Subcontractor** and select the resupply slips of the raw materials. Then press **Validate** to send the raw materials to the subcontractor.

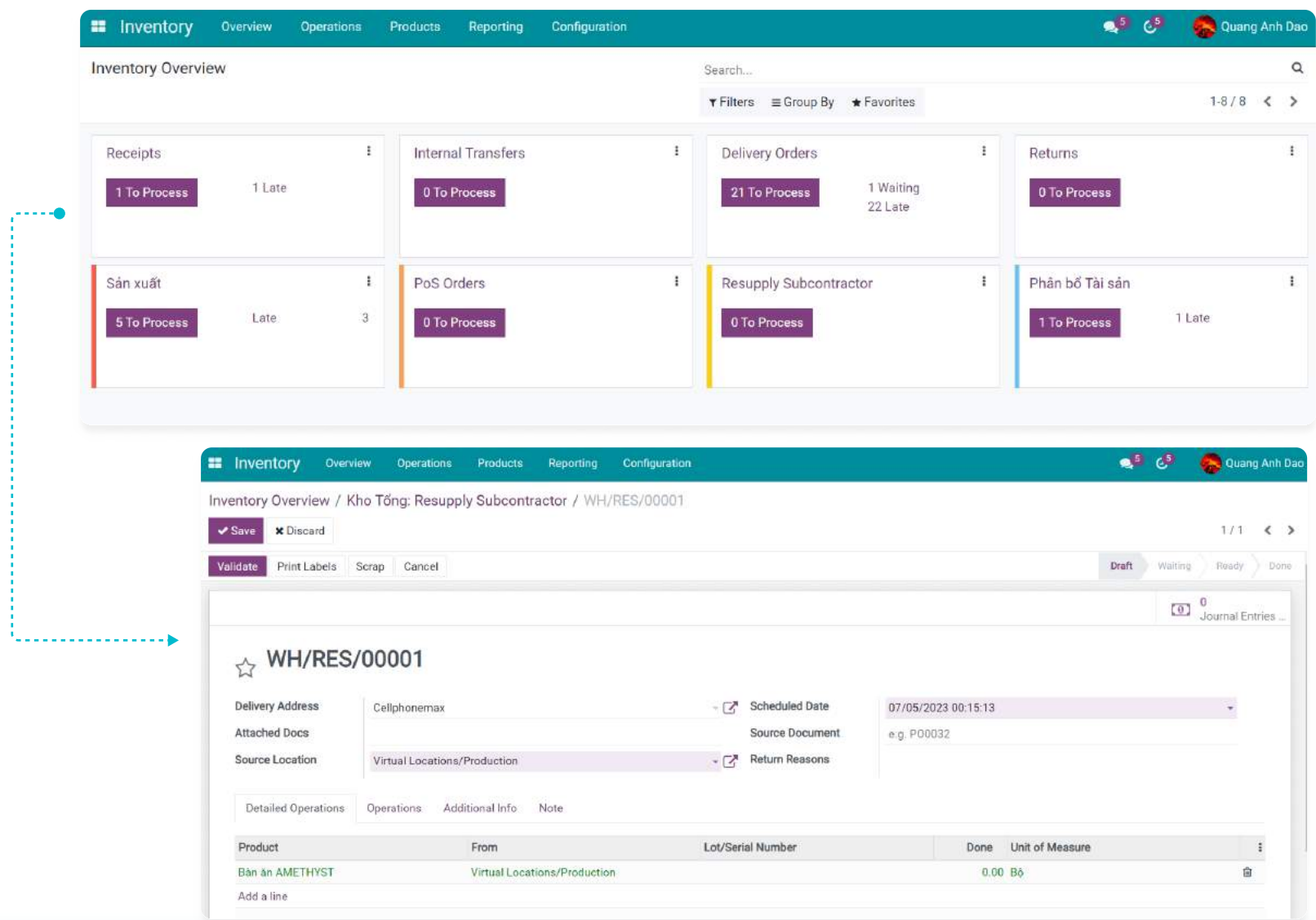




If the material is not available in the inventory, a warning will be displayed on the resupply transfer. The personnel in charge can use that information to plan to purchase necessary materials.

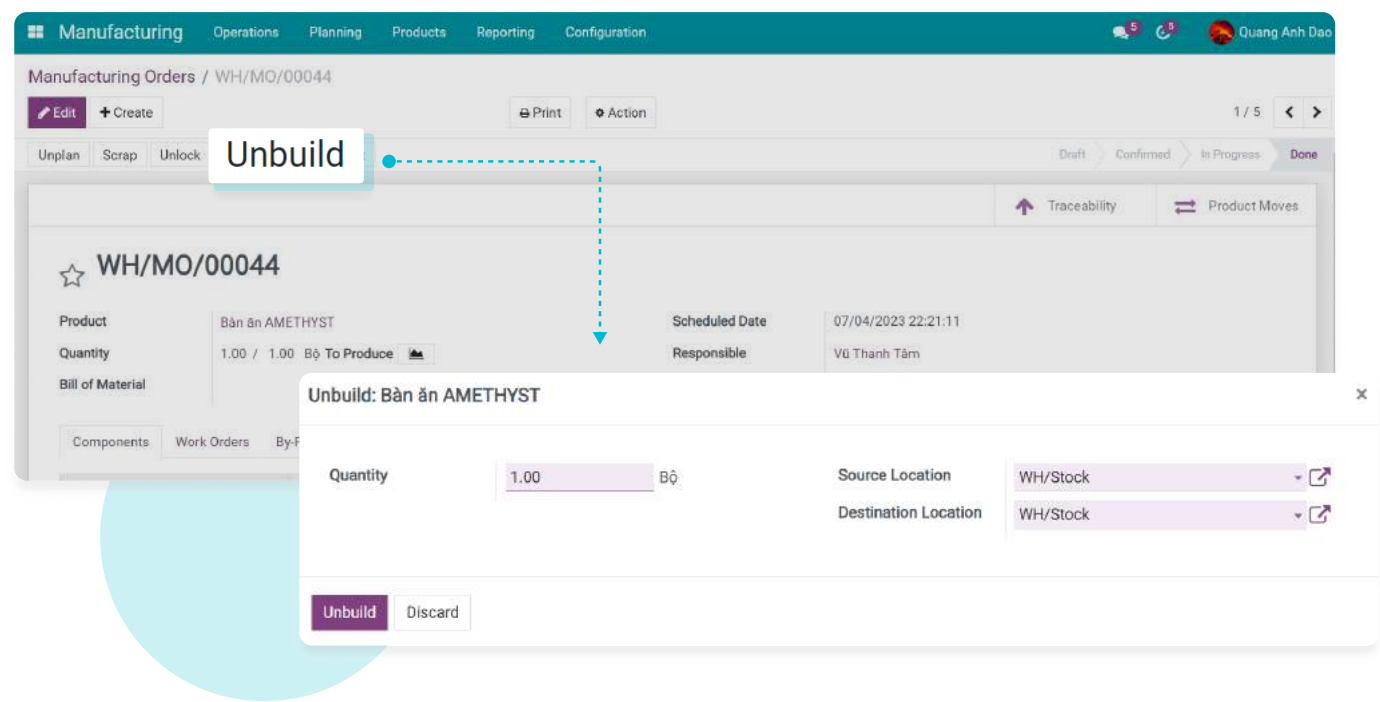
*Receive processed products*

When the subcontractor delivers the processed products, you can proceed to receive them in your inventory navigating to **Inventory ▶ Receipts**, selecting the receiving slip, and pressing **Validate** to receive the products.



## UNBUILD THE FINISHED PRODUCTS

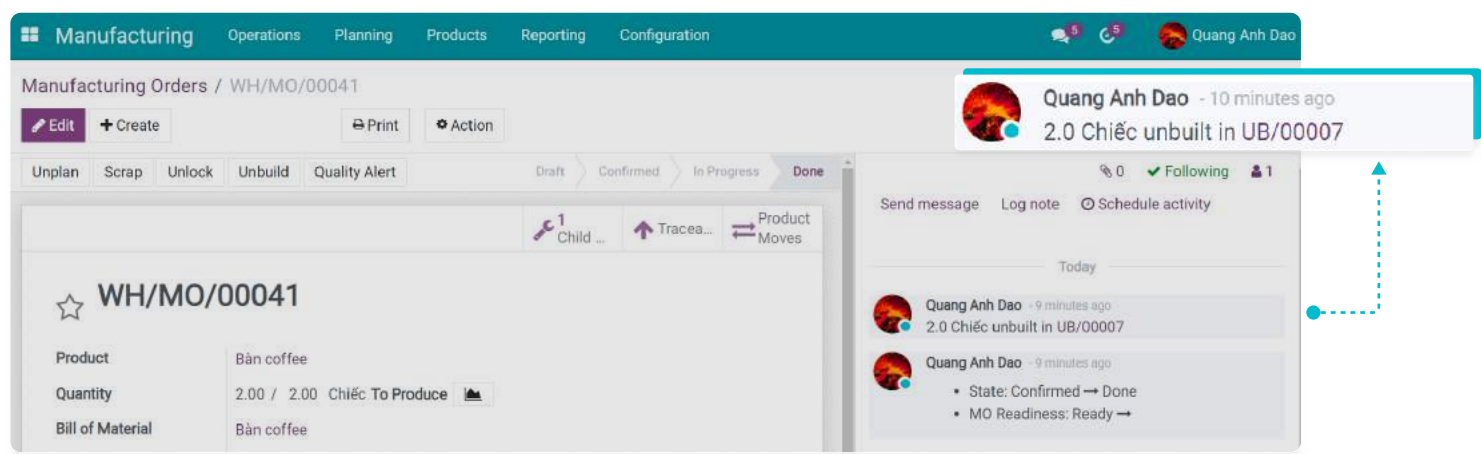
In case you need to unbuild the finished product due to errors or unacceptable parts, you can press the **Unbuild** button on the validated manufacturing order.



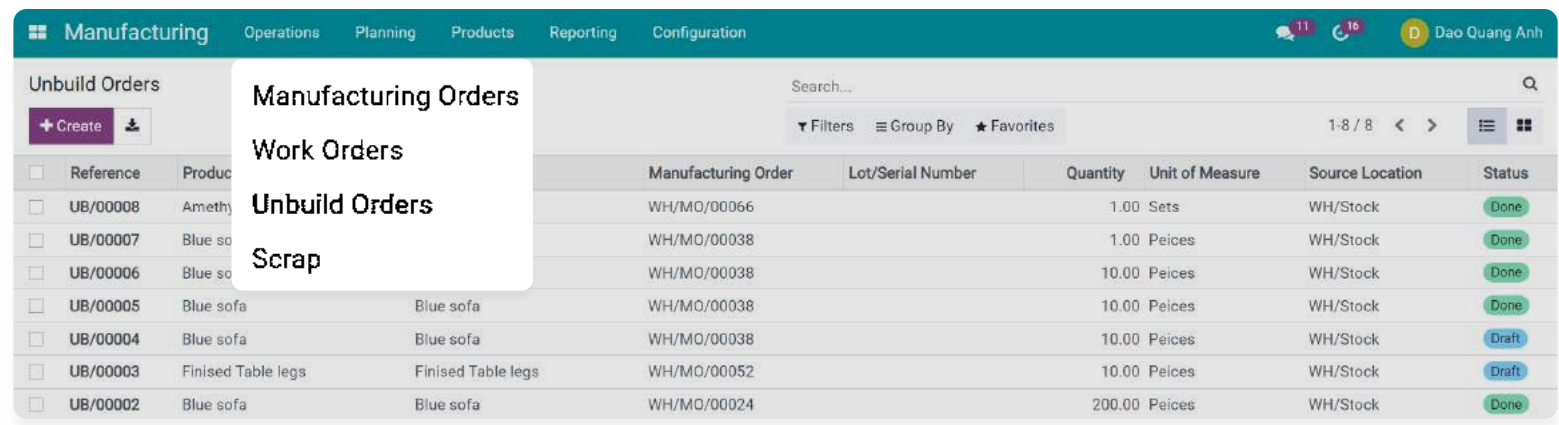
The following information is required for the unbuild order:

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

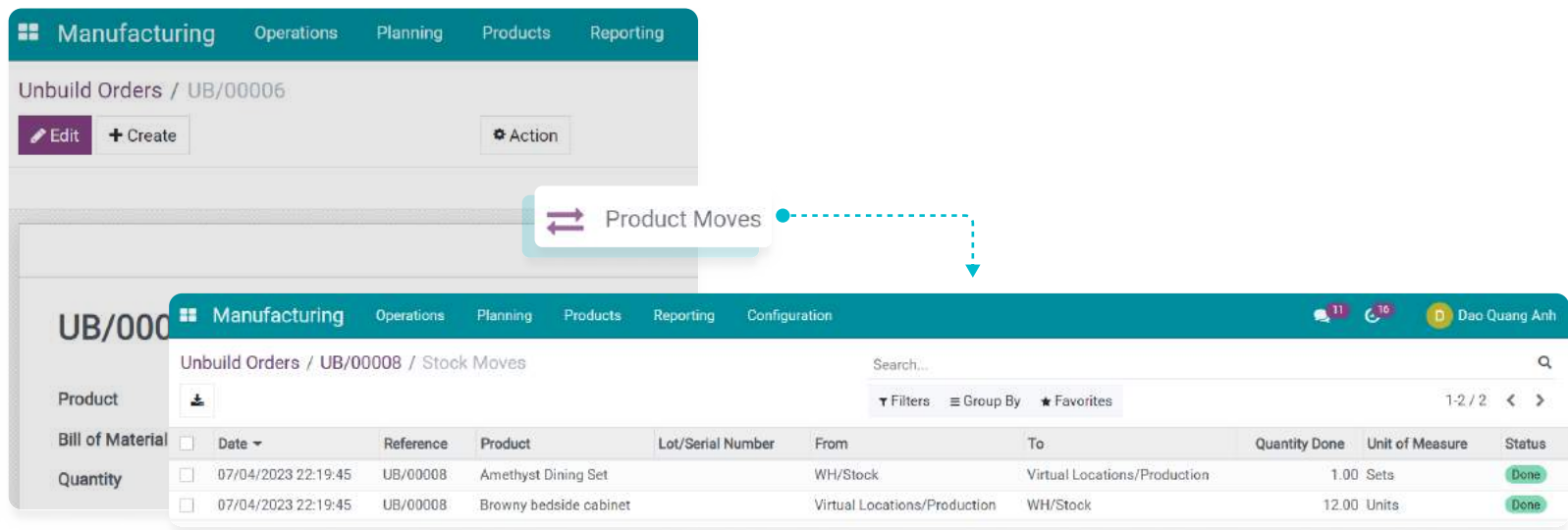
Press **Unbuild** to finish. You can look up the relevant unbuild orders in the chatter area of the manufacturing order.



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

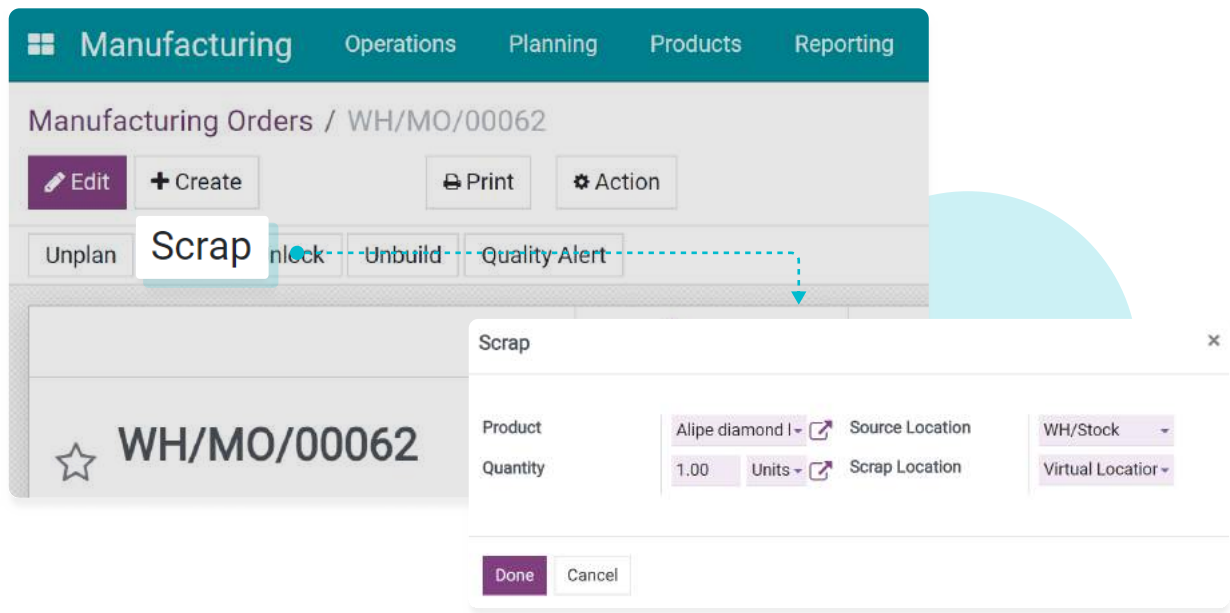


You can also view the transfers automatically generated for the unbuild operation and stock the materials back into the warehouse by clicking on the Product **Moves** button on the unbuild order interface.

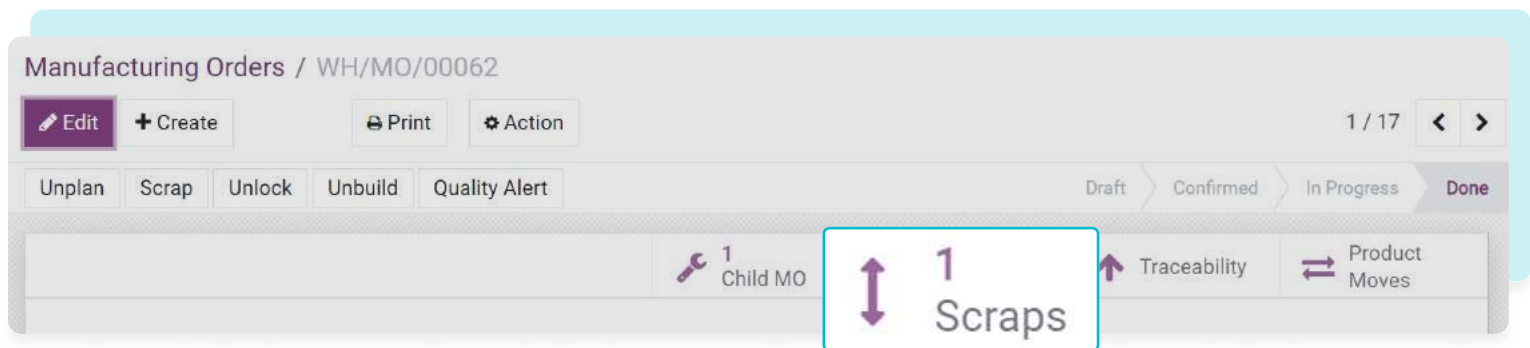


RECORD SCRAPS FROM THE MANUFACTURING PROCESS

Similarly, when you want to remove scrap products and manage this process on the software. On the corresponding 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 **Scraps** on the manufacturing order.





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

Manufacturing

Operations

Planning

Products

Reporting

Configuration

11

16

D Dao Quang Anh

Scrap Orders

+ Create

Manufacturing Orders

Work Orders

Unbuild Orders

Search...

Filters

Group By

Favorites

1-2 / 2

<

>

<input type="checkbox"/>	Reference	Date	Scrap	Quantity	Unit of Measure	Source Location	Scrap Location	Status
<input type="checkbox"/>	SP/00002	07/05/2023 01:01:09	Alipe diamond bookshelf	1.00	Units	WH/Stock	Virtual Locations/Scrap	Done
<input type="checkbox"/>	SP/00001	07/04/2023 22:18:56	Browny bedside cabinet	1.00	Units	WH/Stock	Virtual Locations/Scrap	Done

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

Manufacturing

Operations

Planning

Products

Reporting

Configuration

11

16

D Dao Quang Anh

Scrap Orders / SP/00002

Edit

+ Create

Action

1 / 2

<

>

Draft

Done

SP/00002

Product

Quantity

Product Moves

Manufacturing

Operations

Planning

Products

Reporting

Configuration

11

16

D Dao Quang Anh

Scrap Orders

+ Create

Product

Search...

Filters

Group By

Favorites

1-2 / 2

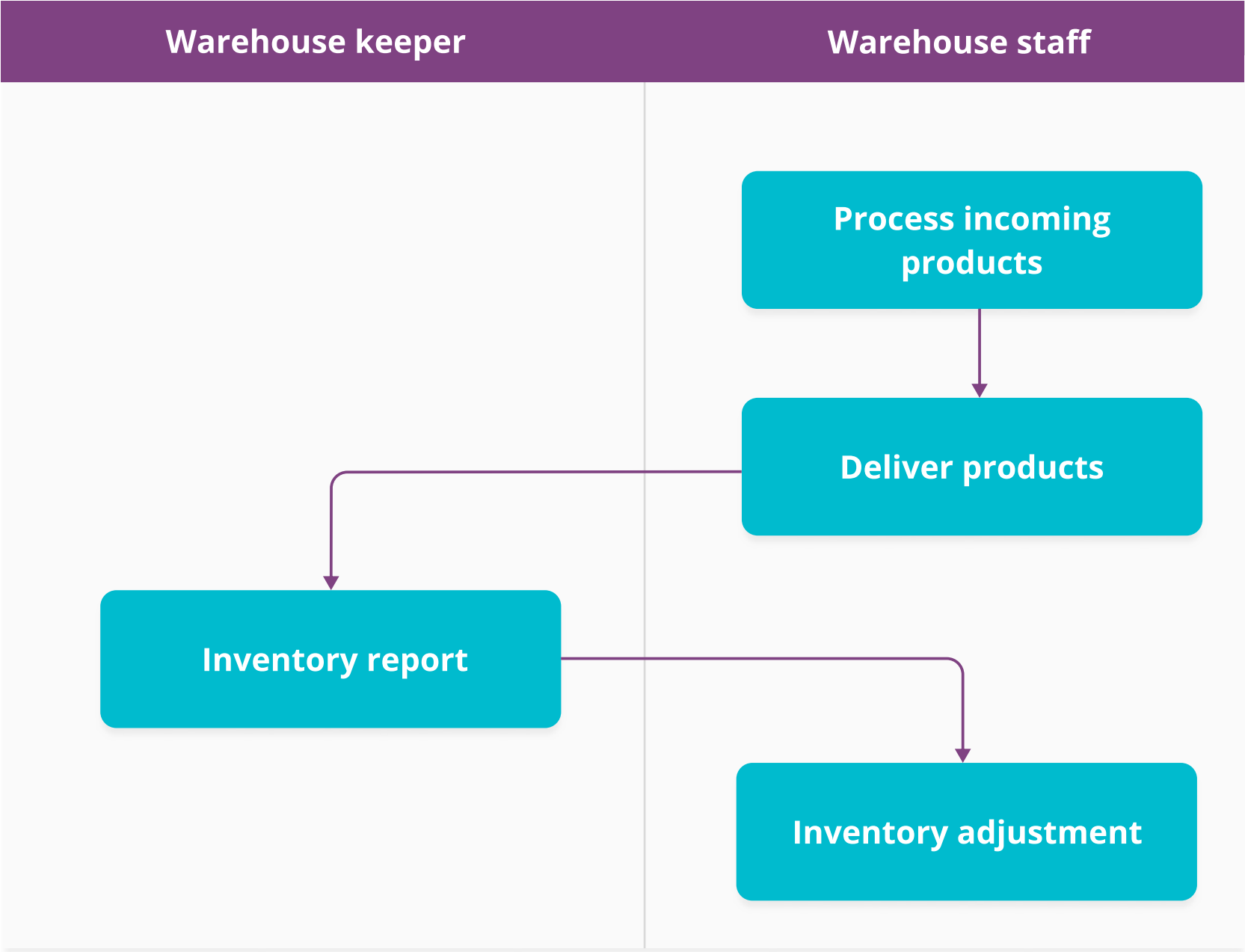
<

>

<input type="checkbox"/>	Reference	Date	Product	Quantity	Unit of Measure	Source Location	Scrap Location	Status
Alipe diamond bookshelf (1)				1.00				
<input type="checkbox"/>	SP/00002	07/05/2023 01:01:09	Alipe diamond bookshelf	1.00	Units	WH/Stock	Virtual Locations/Scrap	Done
Browny bedside cabinet (1)				1.00				



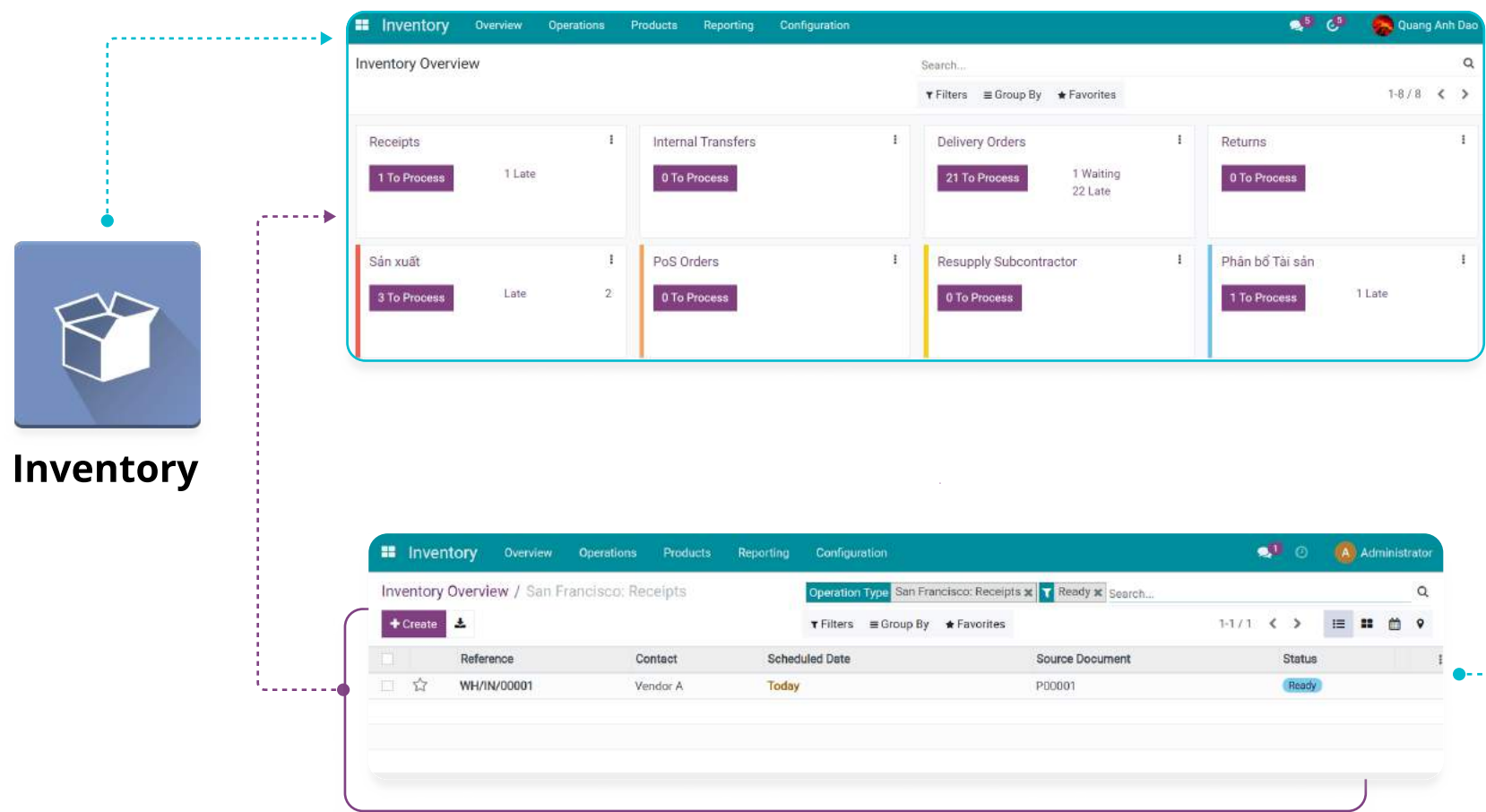




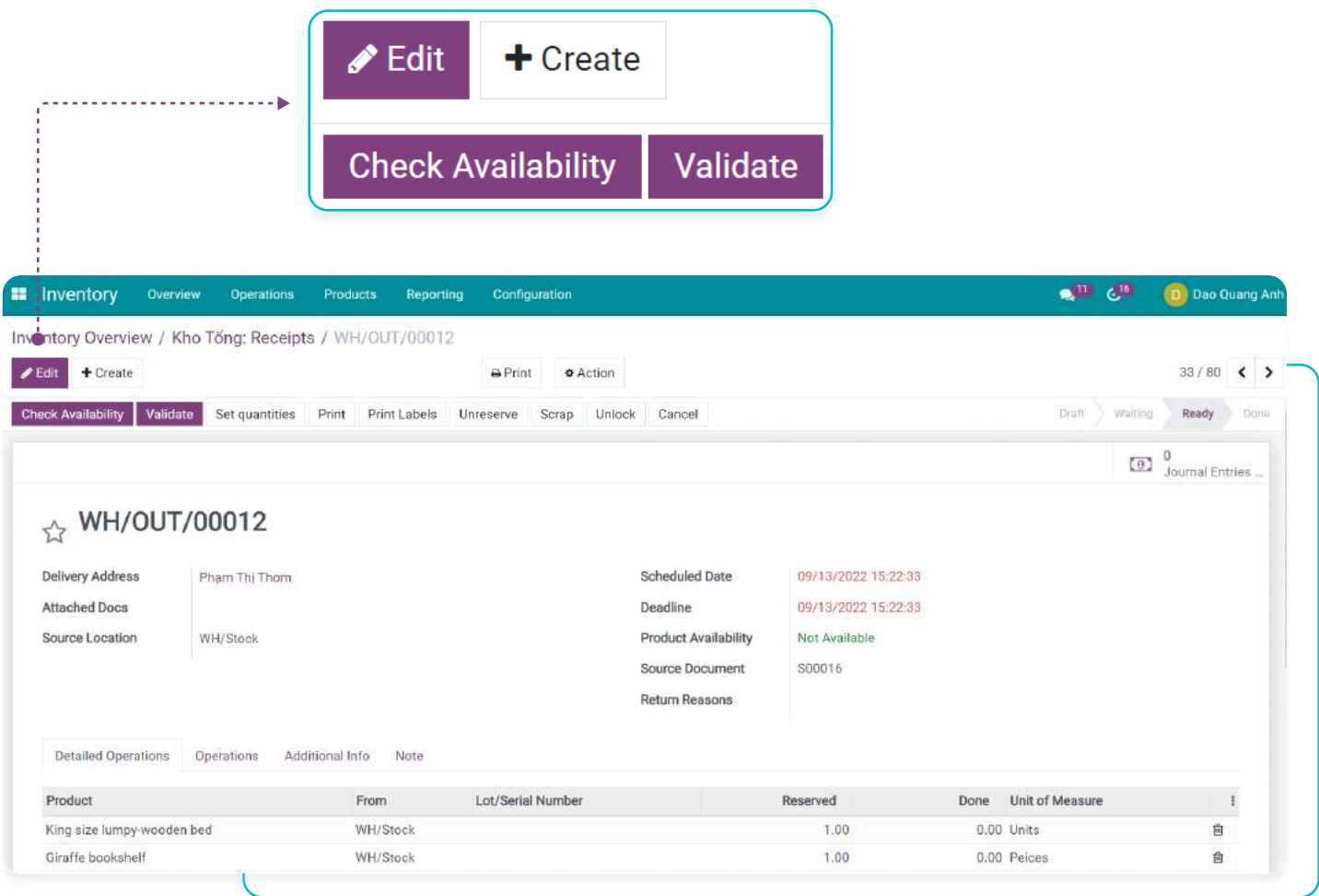
# PROCESS INCOMING PRODUCTS

## Receive products in one order

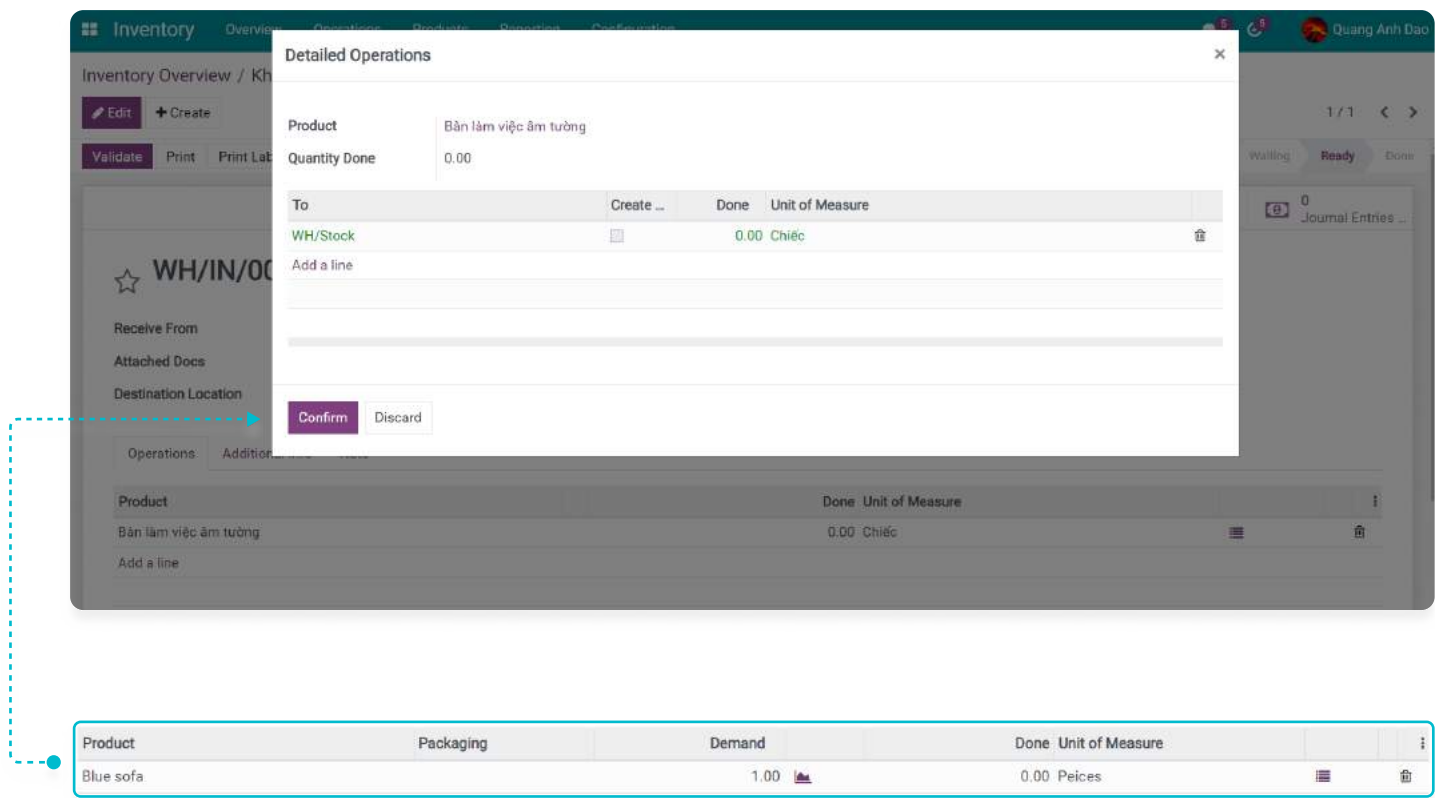
Step 1: Access the **Inventory** app, at the *Overview* interface, go to **Receipts** then press **To Process** to check and confirm the warehouse transfers.



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

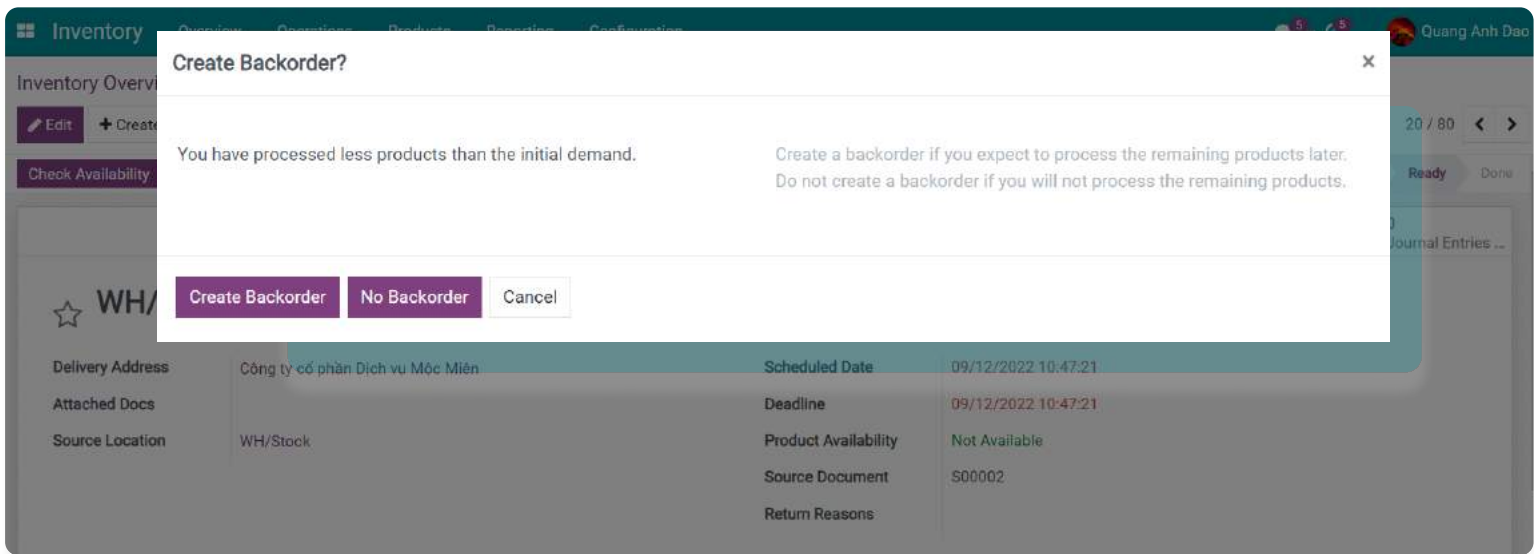


Step 3: At the inventory receipt transfer, press **Confirm** to complete. After confirming the received quantity, this information will be updated on the *Inventory Report*.



Receive products in multiple orders

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

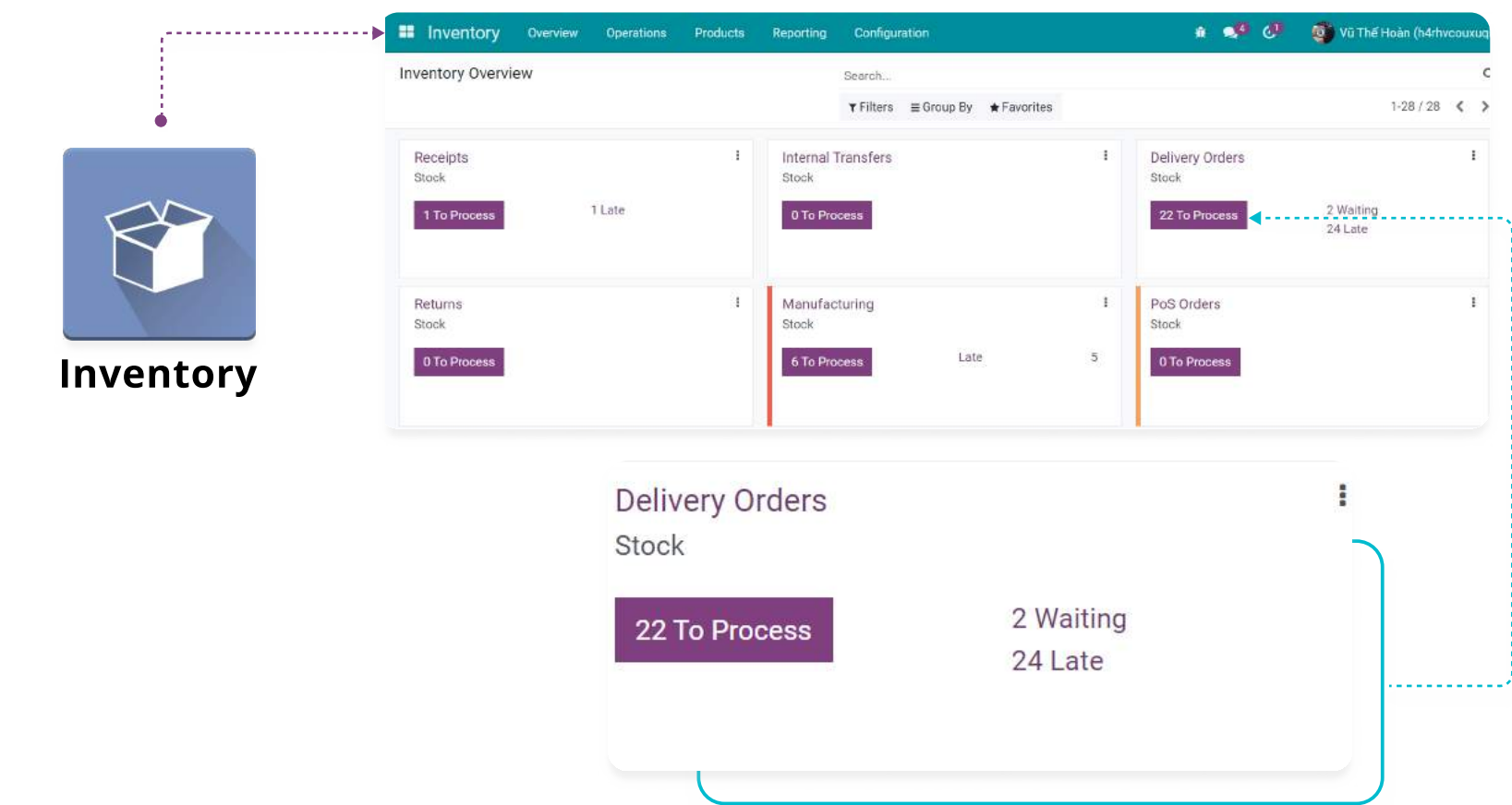




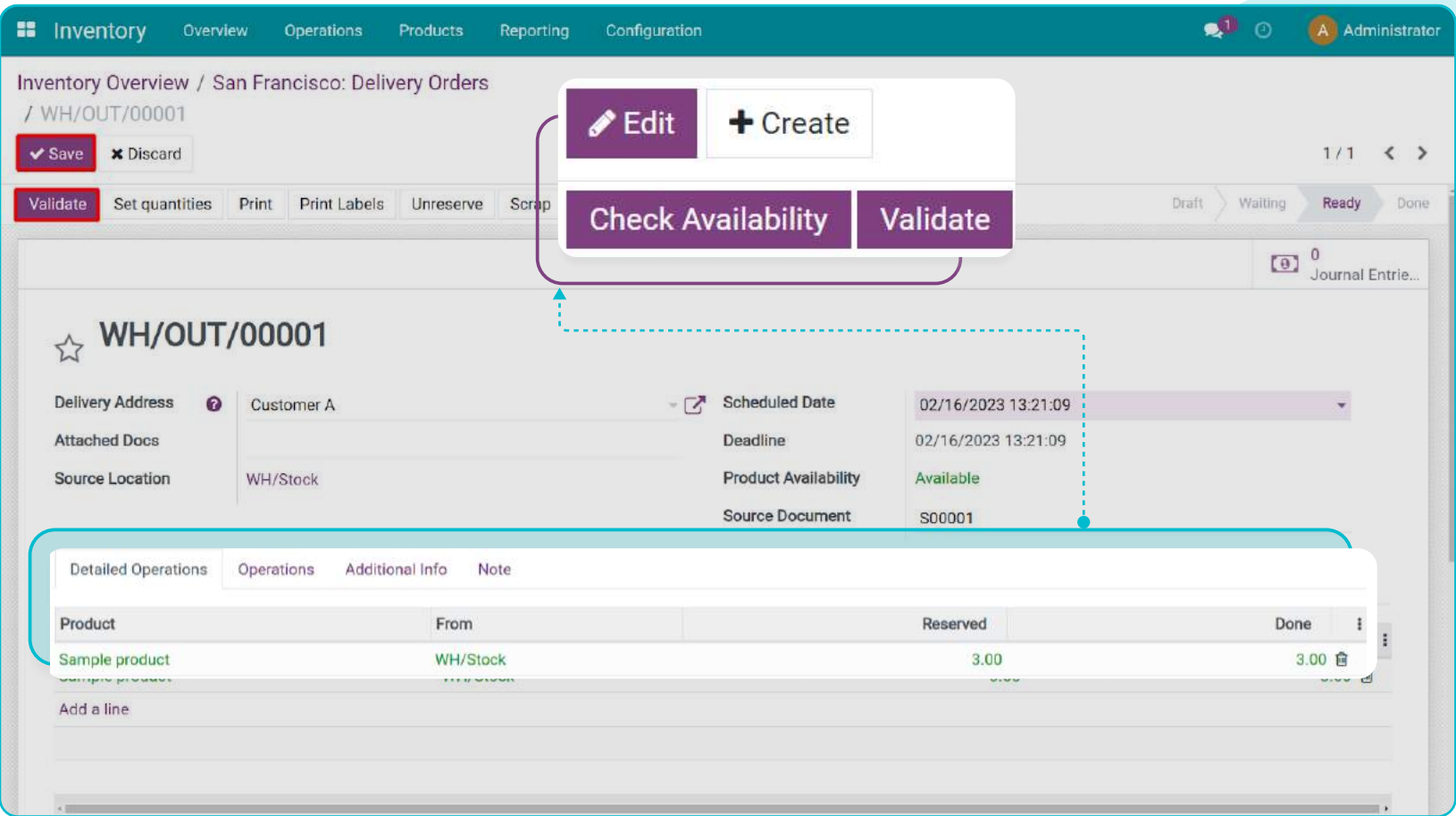
## DELIVER PRODUCTS

### Delivery all products in one order

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



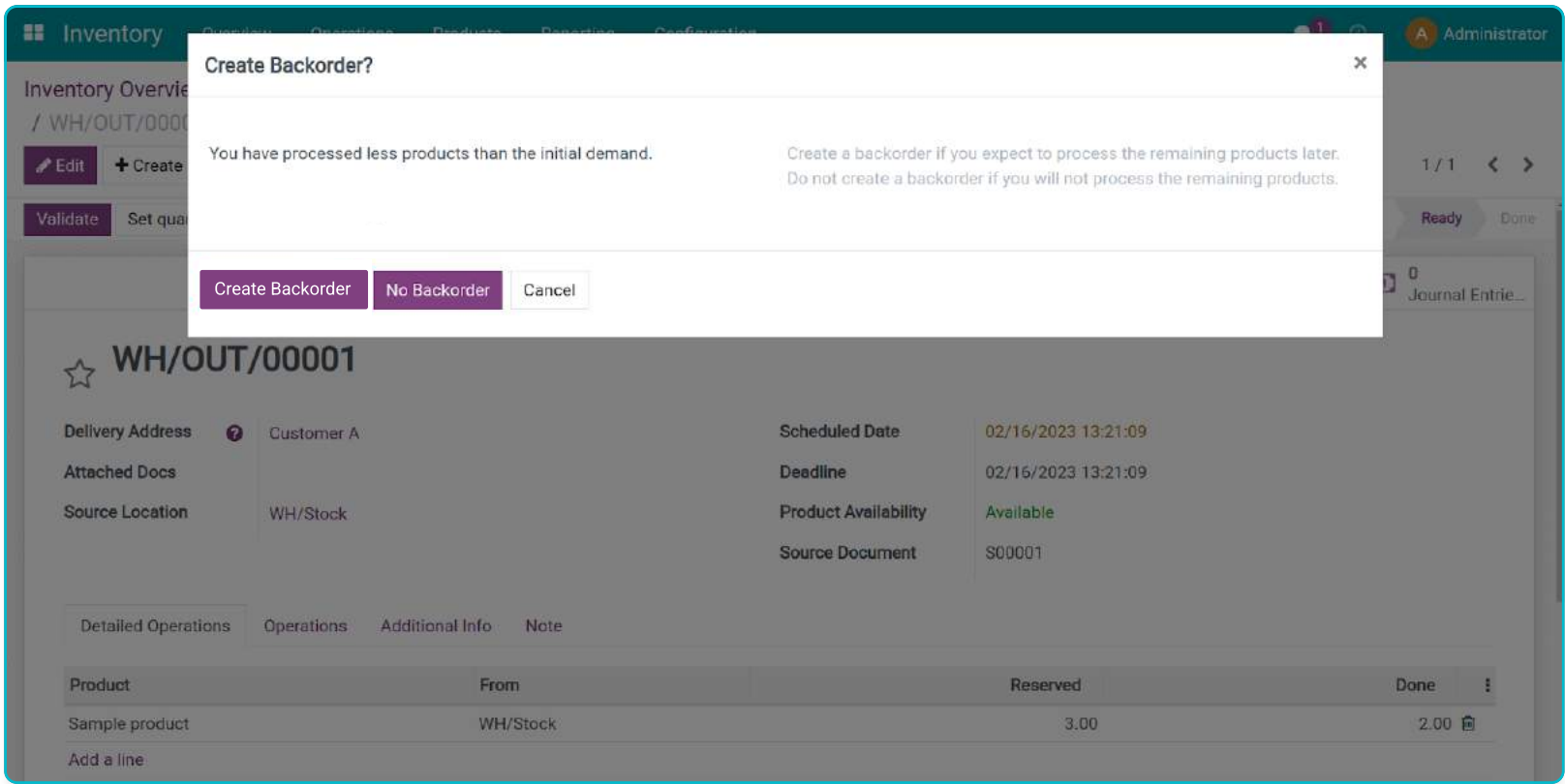
Step 2: Click on the delivery order. Then, press **Edit**, at the **Detailed Operations** tab, and add the number of delivered quantities. Then press **Save ► Confirm**.





## Delivery products in multiple orders

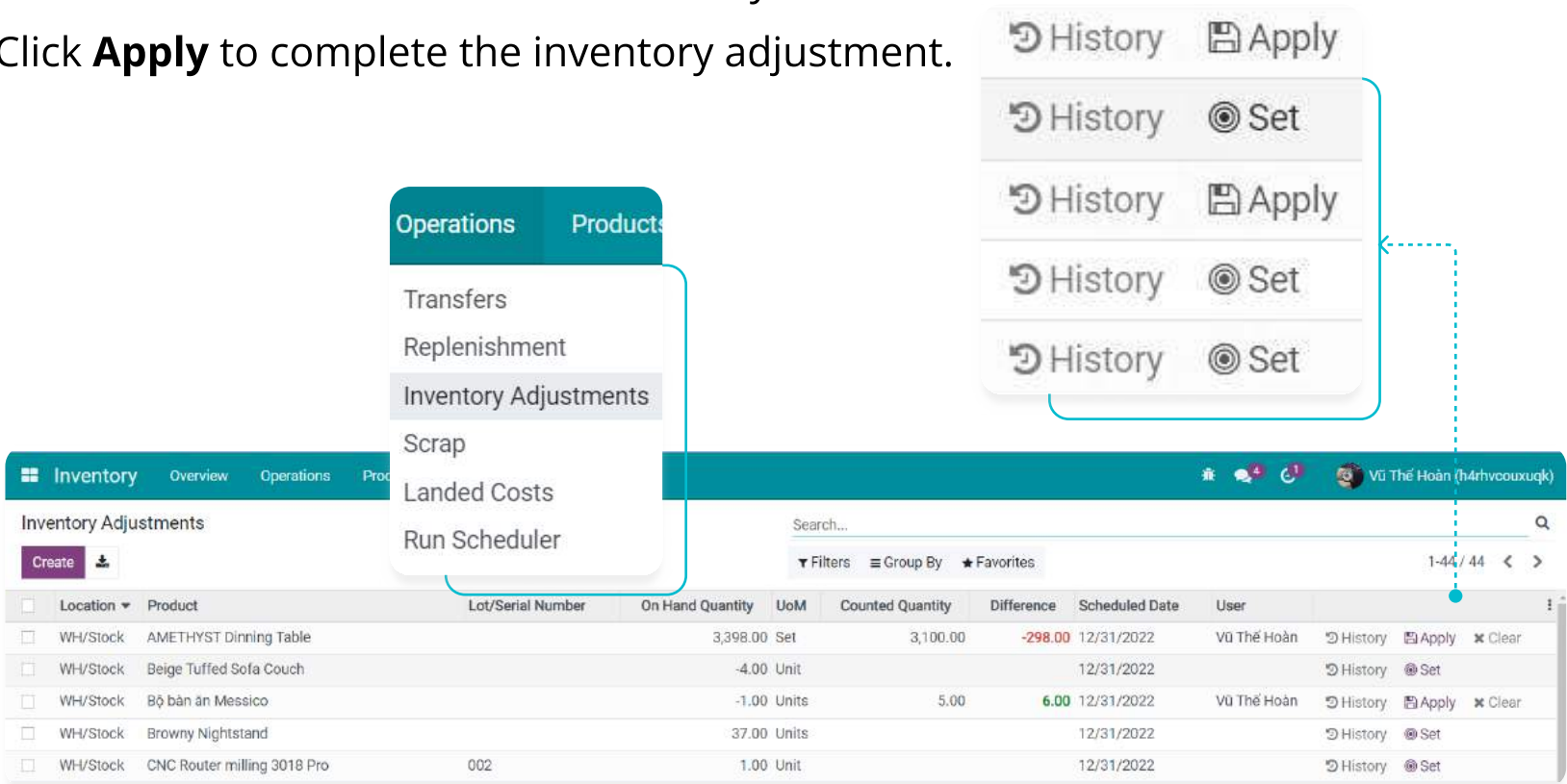
When you deliver your order in multiple deliveries, proceed the similar steps as when you deliver products all at once. However, in **step 2**, after confirming the inventory delivery order, a pop-up window will be displayed, click **Create Backorder** to generate the transfer slip for the rest of your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



## INVENTORY ADJUSTMENT

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

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

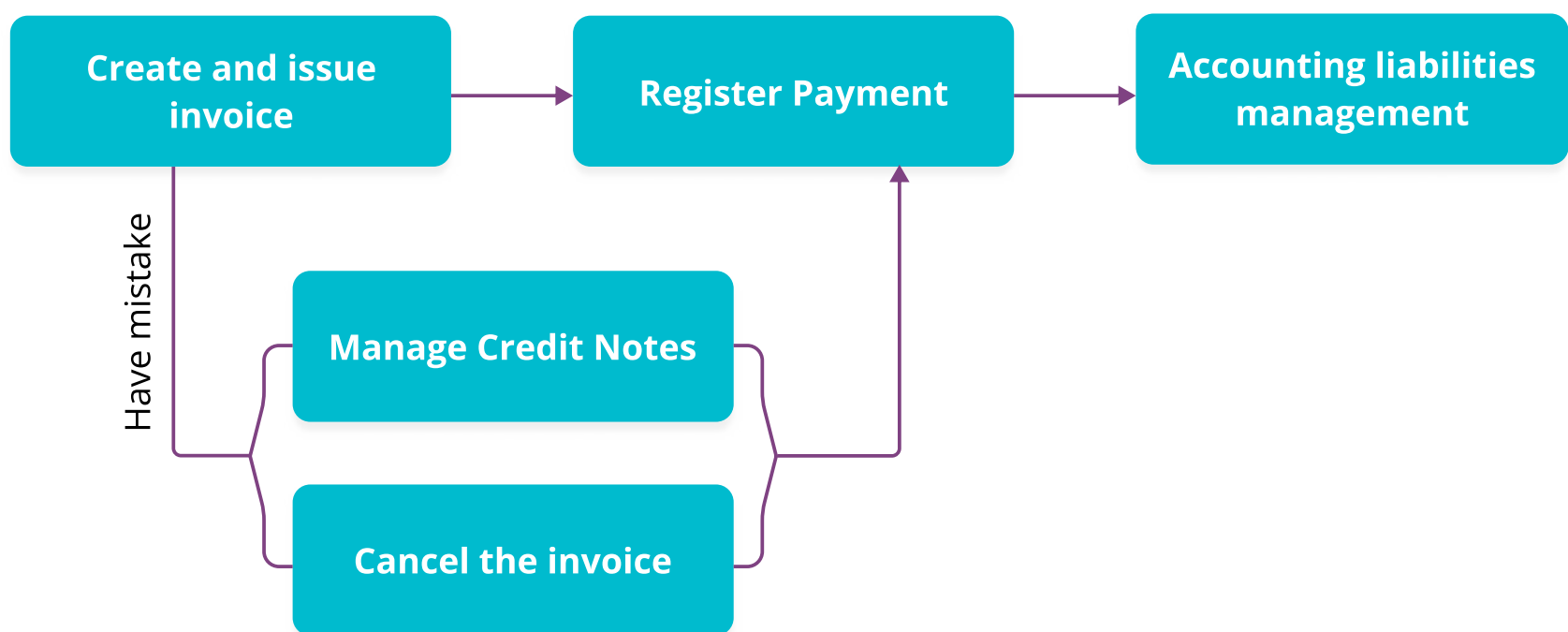


## LIABILITIES ACCOUNTING MANAGEMENT



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.

**Accountants** will create, issue invoices, record payments, and manage liabilities. **Chief Accountants** and managers can monitor the liabilities from the [Invoicing reports \(Page 181\)](#) of the system.



## CREATE AND ISSUE INVOICES

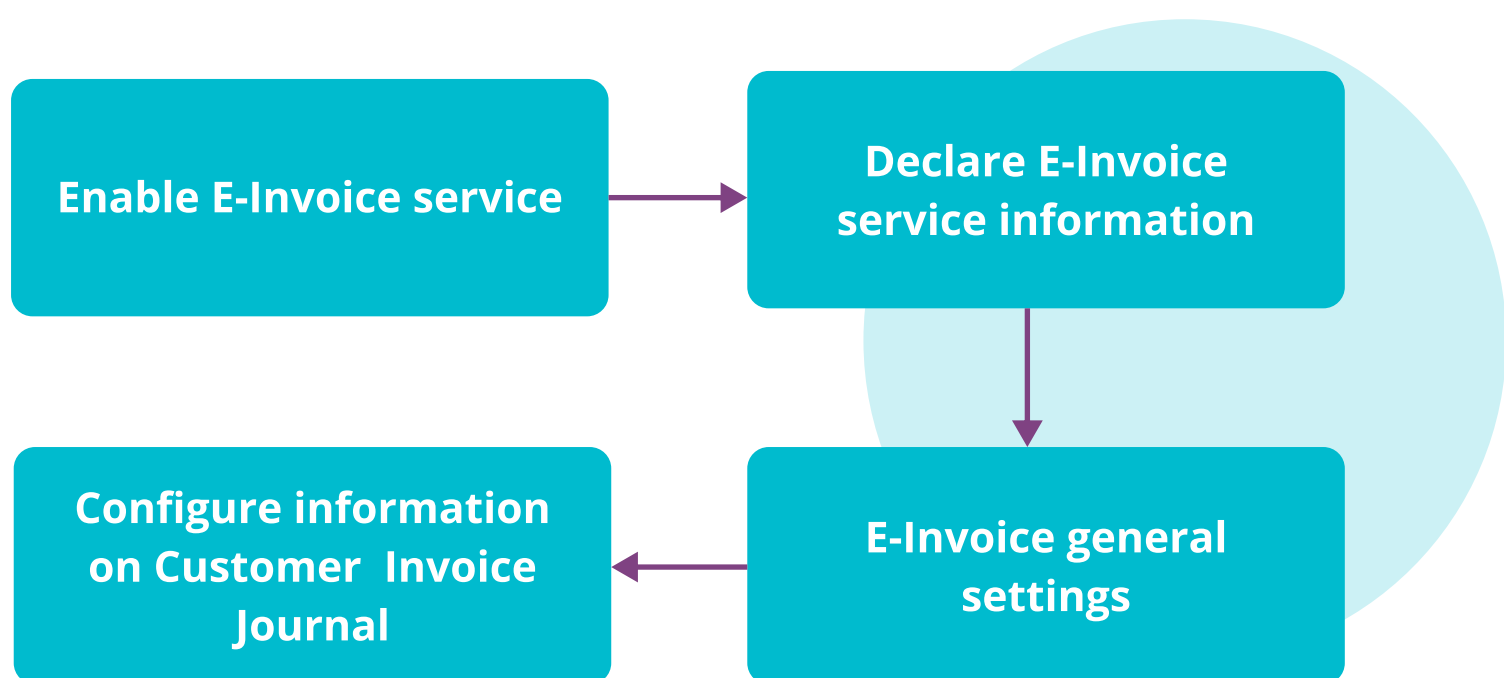
### Customer invoices

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

**Issue E-invoices:** If your business wishes to integrate with an E-invoice provider supported by Viindoo to issue e-invoices right from the Viindoo software.

**Issue internal invoices on Viindoo software:** If you only want to monitor internal liabilities on the system or use another platform to issue E-invoices. Refer to the instructions in the [Create customer invoices](#) article.

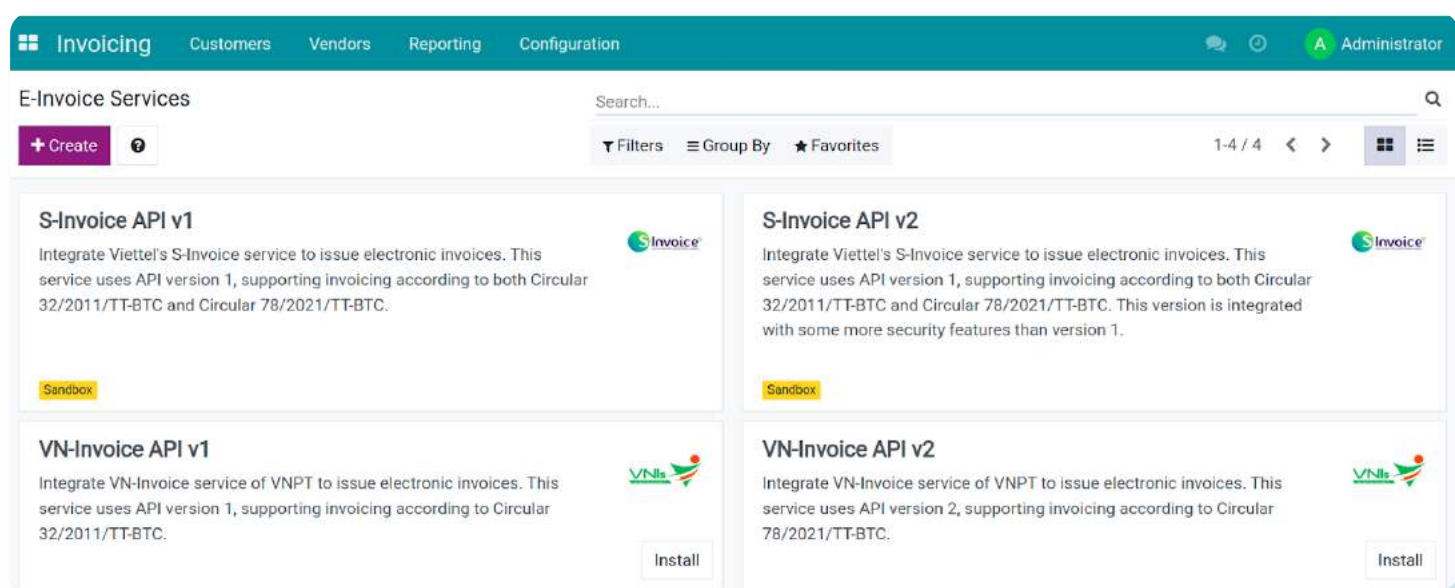
### *Integrate E-Invoice service*



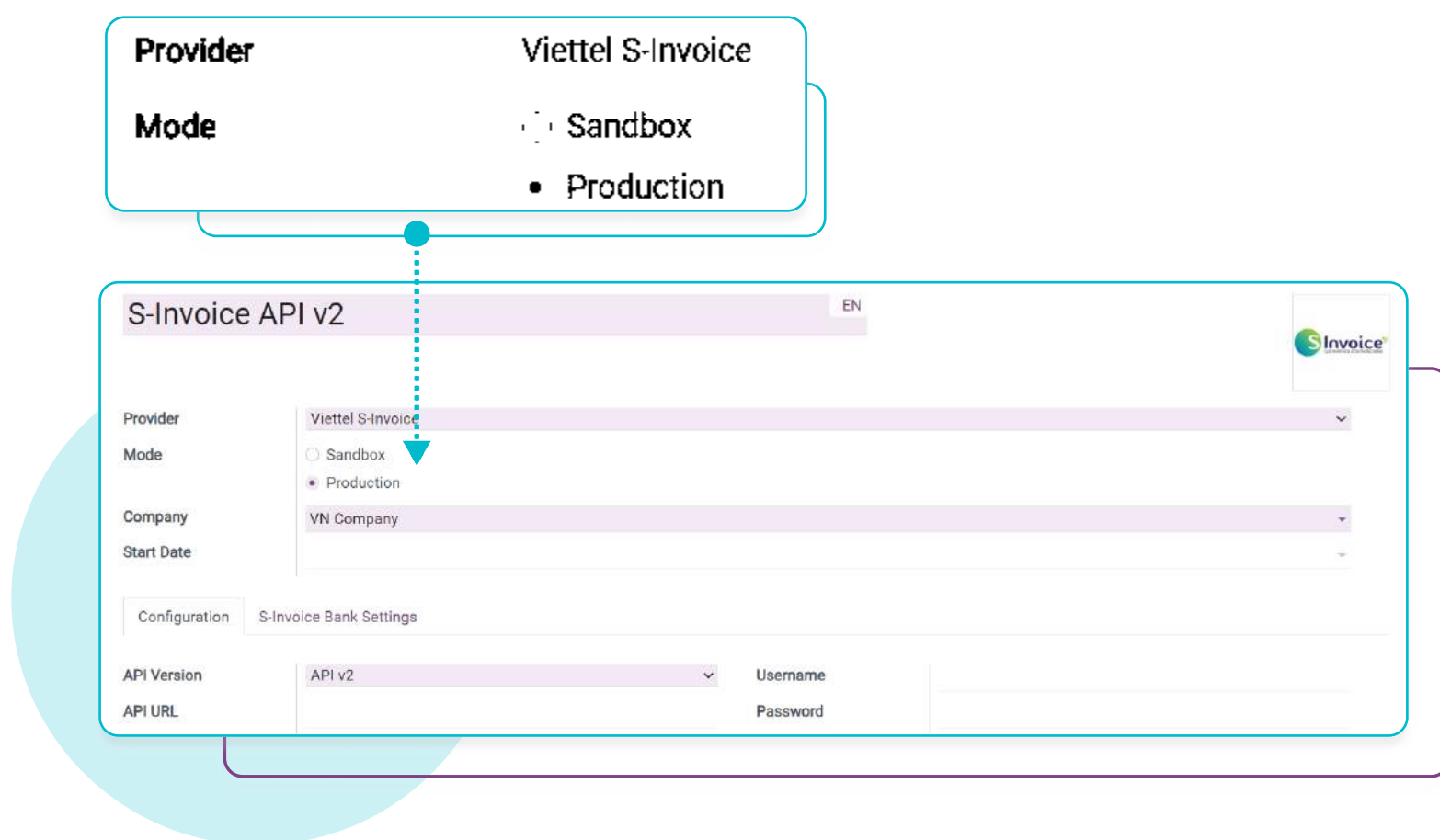
#### Step 1: Enable E-invoice service

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

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



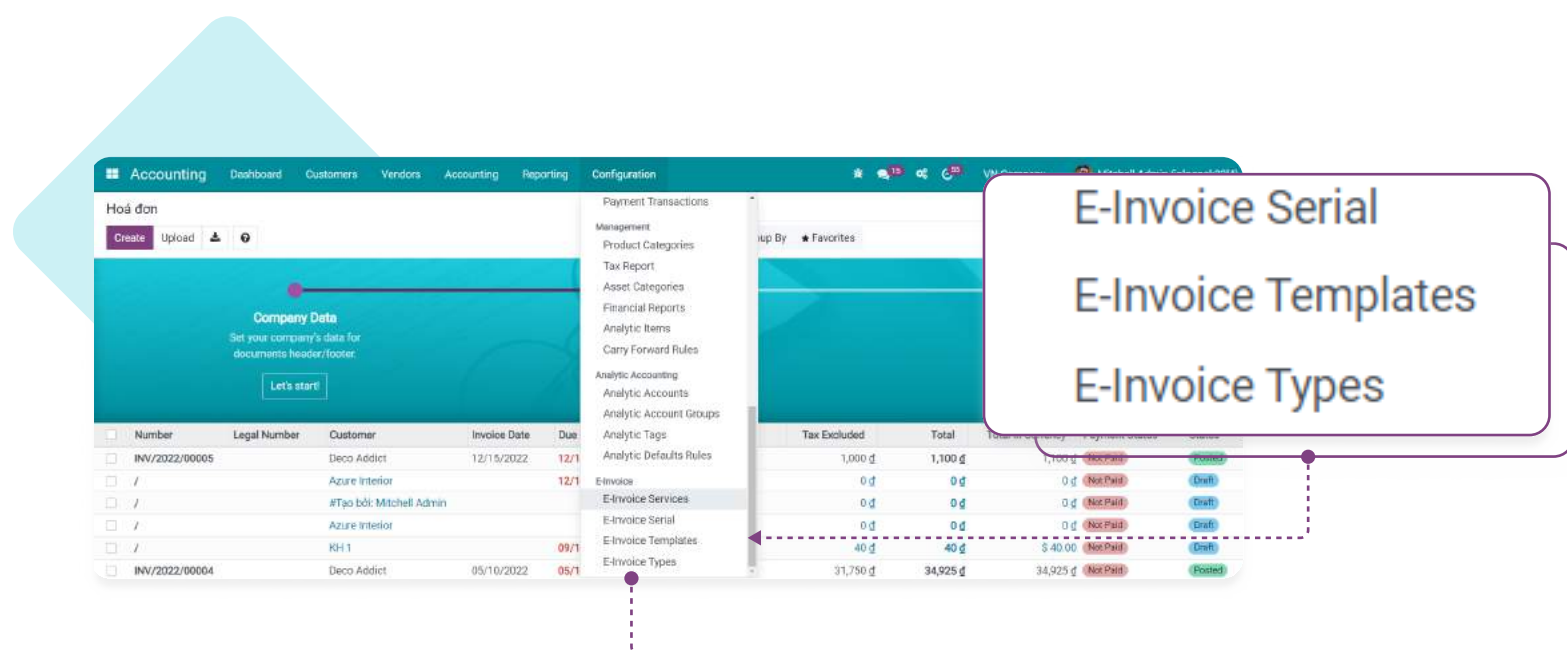
Select the **Production** mode, add the service information for the API URL, *Username*, and *Password* fields. This information will be provided either by S-Invoice or VN-Invoice when you register with any of them.



*Step 2:* Declare E-Invoice service information

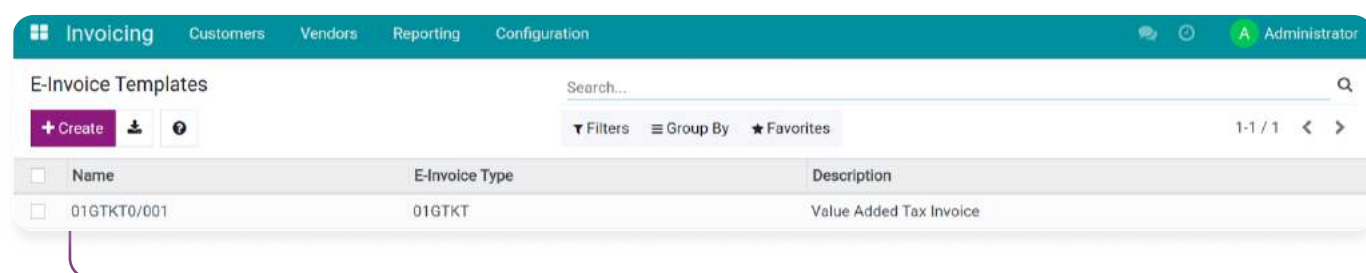
To declare information such as Serial, Templates, and Types, navigate to **Invoicing ► Configuration ► E-Invoices**





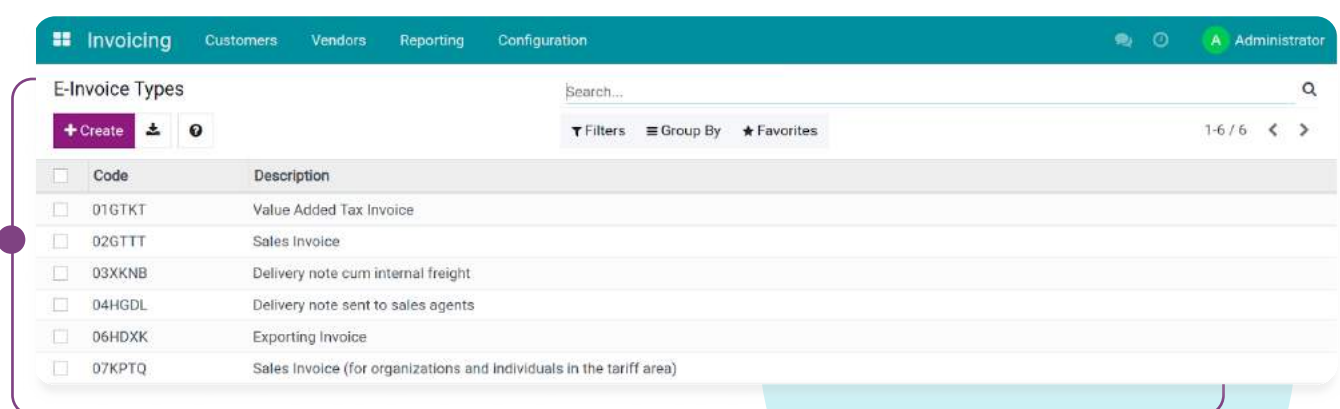
## Declare E-Invoice Types

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



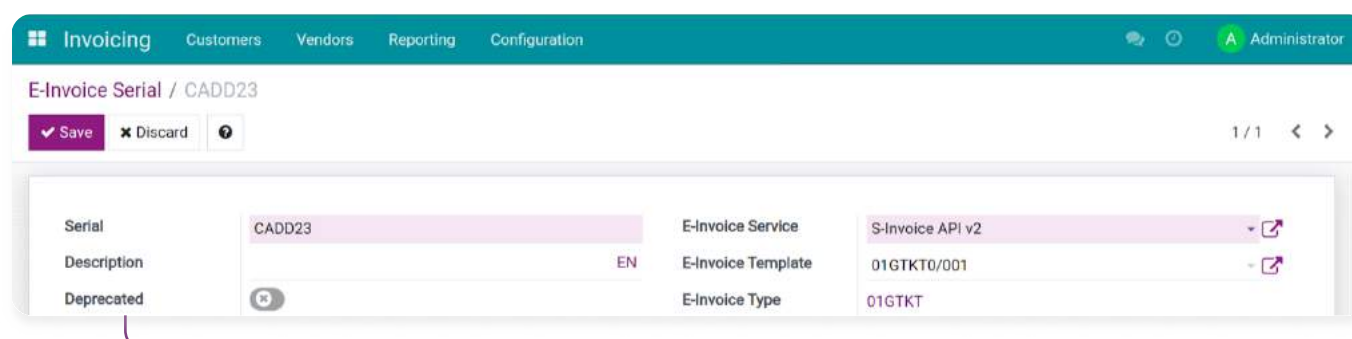
## Declare E-Invoice Templates

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

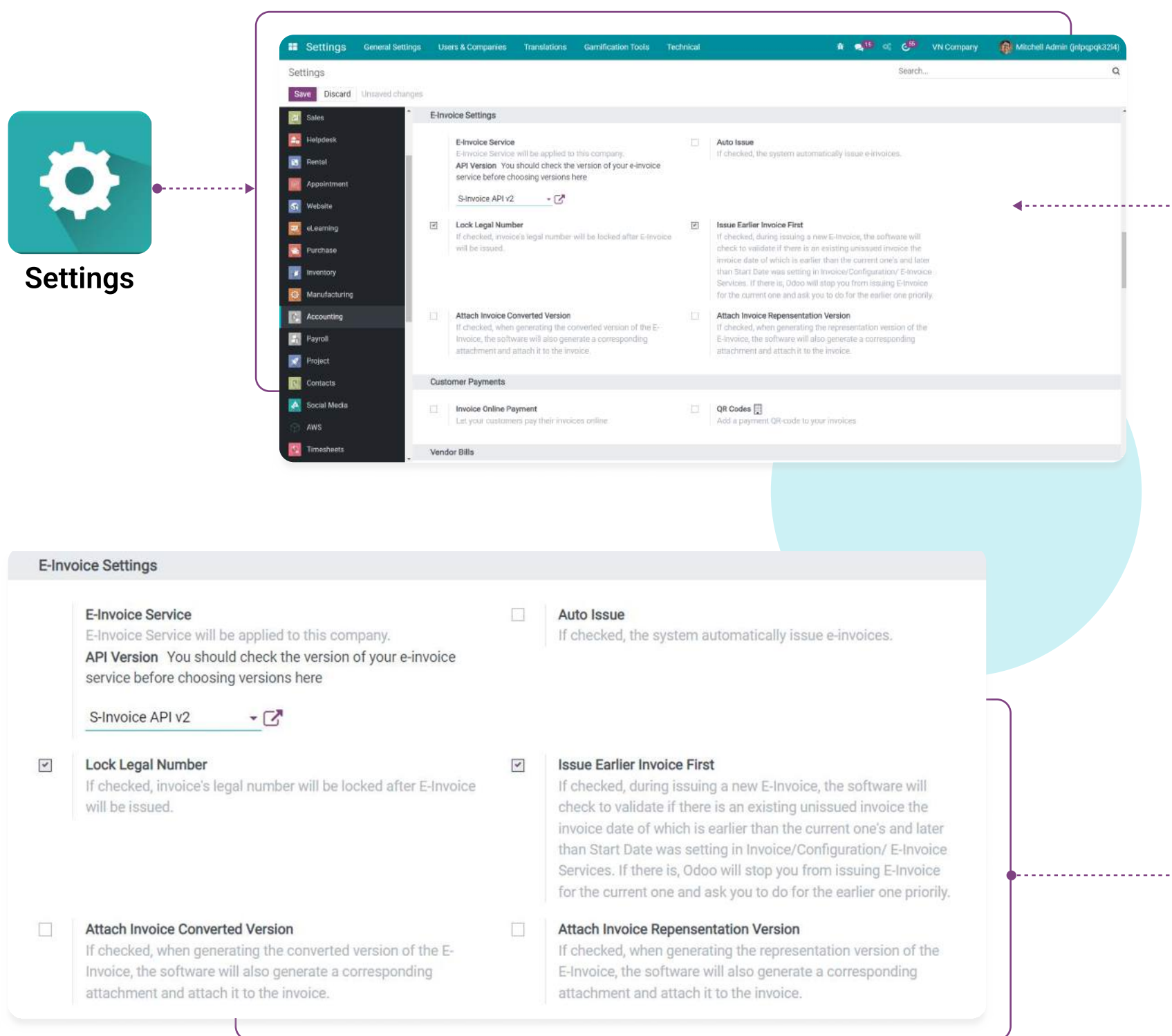


## Declare E-Invoice Serial

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



### Step 3: E-Invoice general settings



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

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

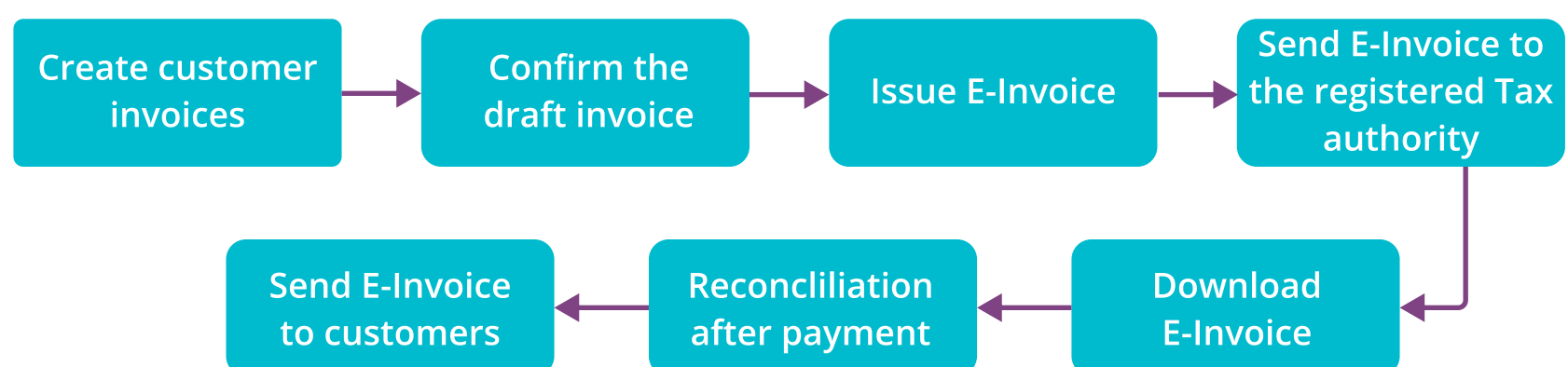
#### Step 4: Configure information on Customer Invoice Journal

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

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

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

#### Issue E-Invoice



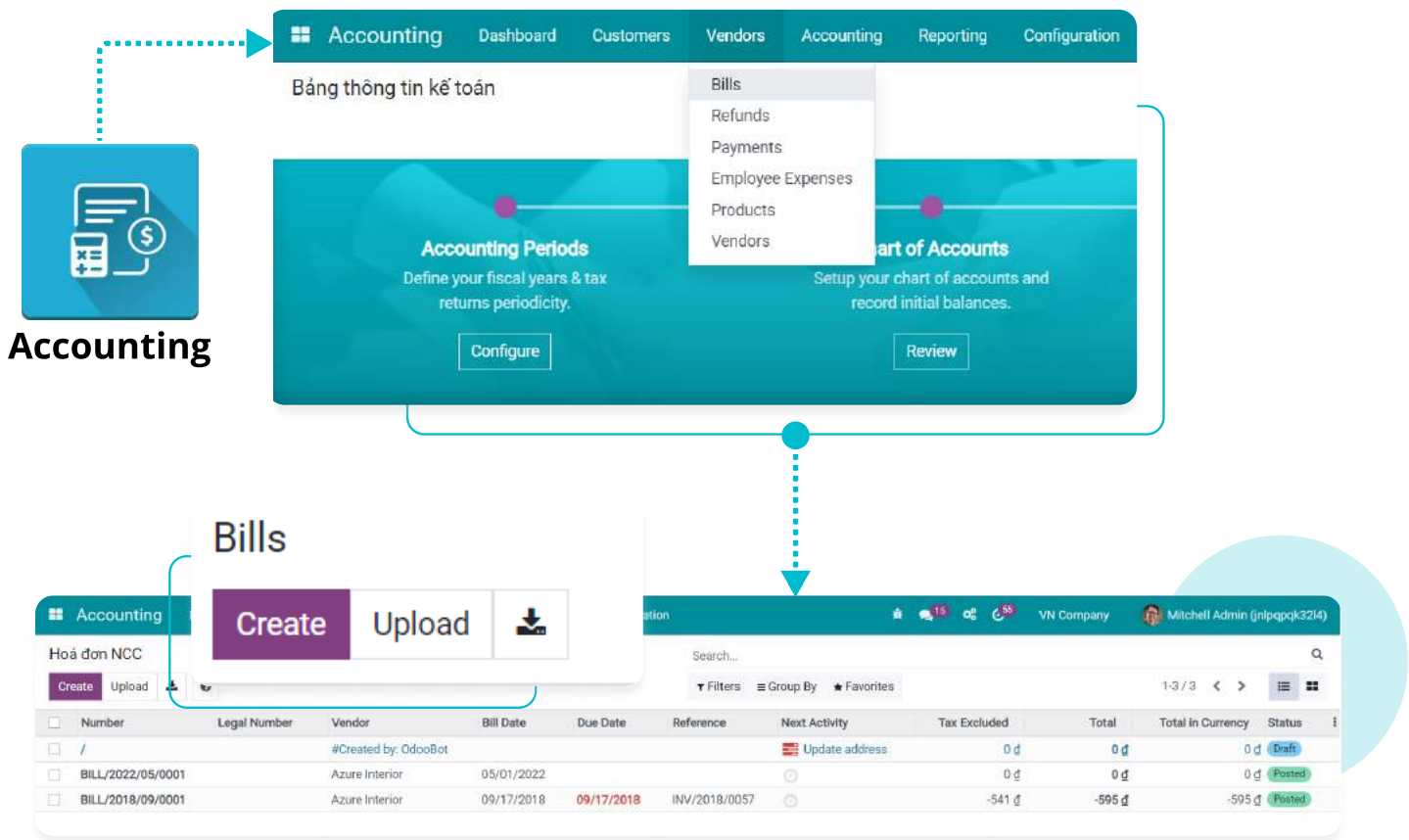
#### ➡ See details at:

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

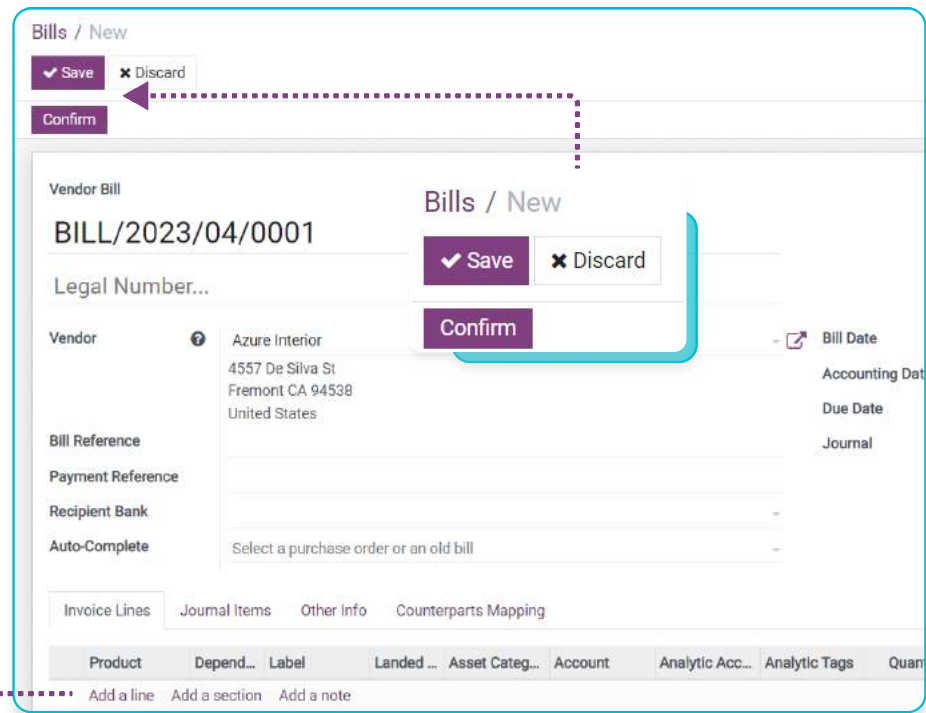
Vendor Bills

Create Vendor Bills

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

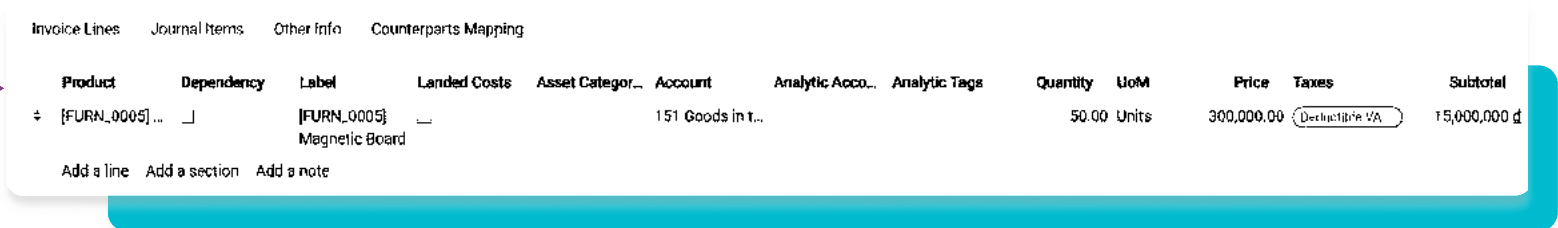


A detailed bill interface will be displayed, adding the necessary information such as Legal Number, Vendor, Bill Date, Accounting Date, and Due Date.



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

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





## Record vendor's receipt

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

Press **Create** and fill in the similar information as [create vendor bill \(Page 124\)](#).

### ! Note

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

The screenshot illustrates the process of creating a vendor receipt in the Viindoo software. It is divided into three main sections:

- Top Section (Vendors Menu):** Shows the 'Accounting' menu with 'Vendors' selected. A dropdown menu lists 'Bills', 'Refunds', 'Payments', 'Products', and 'Vendors'. The 'Vendors' option is highlighted, and a 'Bank account' field is visible below it.
- Middle Section (Purchase Receipt Settings):** A settings panel for 'Purchase Receipt' with various options and checkboxes:
  - Manage Multiple Warehouses: ☐
  - Manage Product Packaging: ☐
  - Manage Push and Pull inventory flows: ☒
  - Manage Work Order Operations: ☒
  - Produce residual products: ☒
  - Purchase Receipt: ☒
  - Require a signature on your delivery orders: ☐
  - Send an automatic reminder email to confirm delivery: ☒
  - Show Recurring Revenues Menu: ☐
  - Tax display B2C: ☐
  - Unlocked by default: ☒
- Bottom Section (Draft Purchase Receipt Form):** A form titled 'Receipts / Draft Purchase Receipt BILL/2023/04/0001'. It includes fields for:
  - Vendor: My Company (Vietnam)
  - Bill Reference: (empty)
  - Payment Reference: (empty)
  - Recipient Bank: (empty)
  - Bill Date: (empty)
  - Accounting Date: 04/27/2023
  - Due Date: 04/27/2023
  - Currency: VND
  - Invoice Lines: A table with columns for Product, Label, Quantity, Price, Taxes, and Subtotal.

## ADJUSTING INVOICES

### Customer Credit Notes

When a customer returns goods or there is an error in the price on the invoice issued to the customer, the accountant will create a credit note for them. In the software, you can create a credit note directly on the customer invoice or create one by accessing **Invoicing** ► **Customers** ► **Credit Notes**.

#### *Create Credit Notes from customer invoices*

Navigate to **Invoicing** ► **Customers** ► **Invoices**, select an invoice and press **Add Credit Note**.

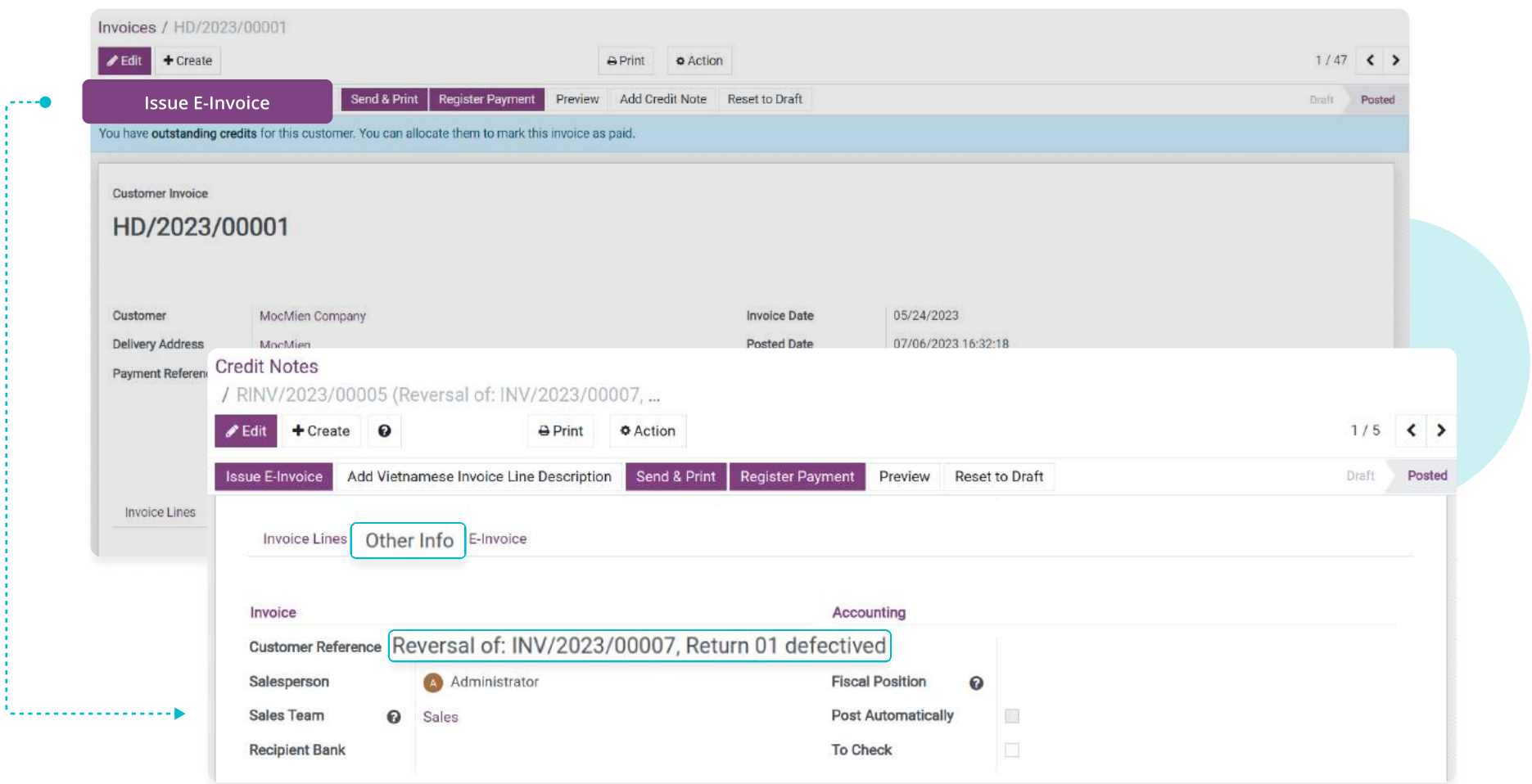
The screenshot displays the 'Invoices / INV/2023/00007' interface. At the top, there are buttons for 'Edit', 'Create', 'Print', and 'Action'. Below these, a row of buttons includes 'Send & Print', 'Register Payment', 'Preview', 'Add Credit Note' (highlighted with a red box and a red arrow pointing to the pop-up), 'Cancel S-Invoice', 'Reset to Draft', and 'Download E-Invoice Display Version'. The main area shows a 'Customer Invoice' for 'INV/2023/00007' with reference 'K23TDV308'. The customer is 'Azure Internal'. The invoice date and due date are '04/28/2023', and the currency is 'VND'. A 'Payment P' button is visible at the bottom left. A 'Posted' status is shown at the bottom right. A 'Credit Note' pop-up form is overlaid on the bottom right. It has a title bar with a close button. The form contains: 'Credit Method' with radio buttons for 'Partial Refund' (selected), 'Full Refund', and 'Full refund and new draft invoice'; 'Reason' with a text field containing 'Return 01 defectived'; 'Reversal Date' with radio buttons for 'Specific' (selected) and 'Journal Entry Date'; 'Use Specific Journal' with a dropdown menu set to 'Customer Invoices'; and 'Refund Date' with a dropdown menu set to '04/28/2023'. A note at the top right of the form states: 'The credit note is created in draft and can be edited before being issued.' At the bottom are 'Reverse' and 'Cancel' buttons.

A pop-up will appear, select a **Credit Method** (make sure you read the note next to the field when you select a method), type the reason for the credit note, set the reversal date, and then press **Reverse**.

➡ See details at:

- [\*How to use Credit Notes in Viindoo Accounting.\*](#)

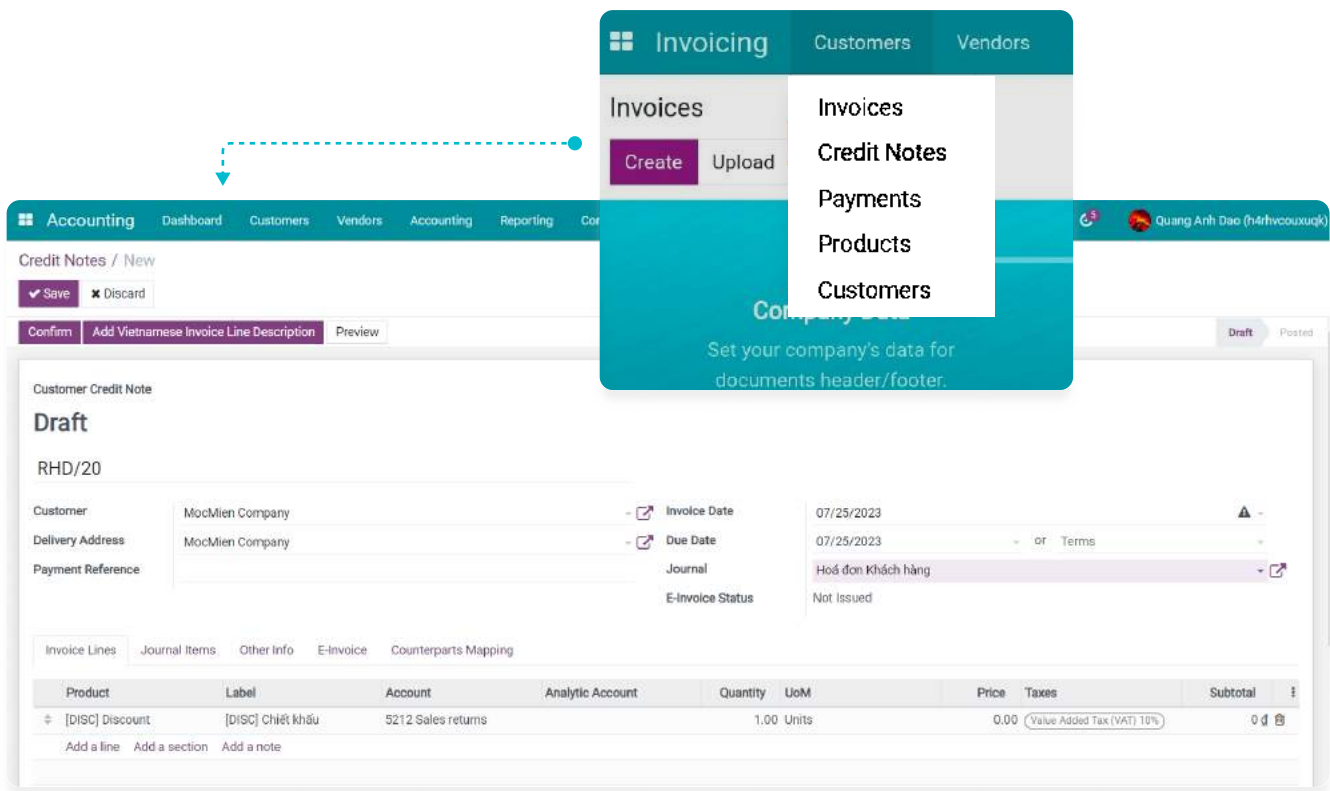
After pressing **Confirm**, you press **Issue E-Invoice** to complete issuing credit notes:



On the Other Info tab, you can see the linked invoice:

Create a Credit Note manually

To create a credit note, navigate to **Invoicing** ► **Customers** ► **Credit Notes**, and press **Create**.



Fill in the information on the credit note.

The information on the credit note should be filled out similarly to the regular customer invoice. Press **Save ▶ Confirm ▶ Issue E-Invoice** to finish.

**Vendor refunds**

When you return goods to a vendor, or when the vendor records incorrect price/ quantity information or agrees to reduce a payable to your business. The Accountant will record the information into the software by creating a refund.

There are two ways to do this:

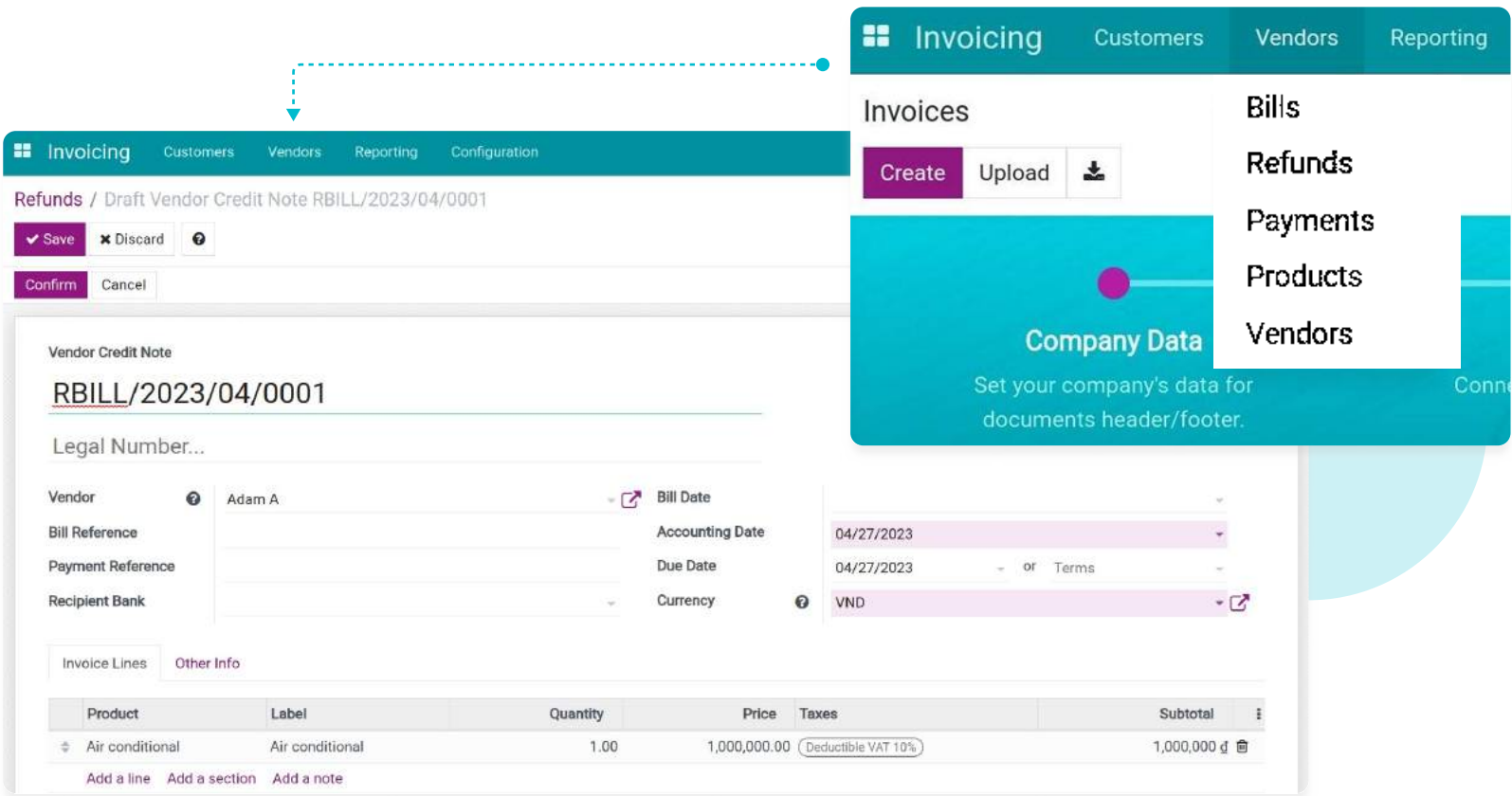
*Create a refund from the vendor bill*

➔ See details at:

- *[How to refund in Viindoo Accounting.](#)*

*Create a refund manually*

Navigate to **Invoicing ▶ Vendors ▶ Refunds**, and press **Create**.



Fill in the information in the Vendor Credit Note sheet.

The information on the credit note should be filled out similarly to the regular vendor invoice.

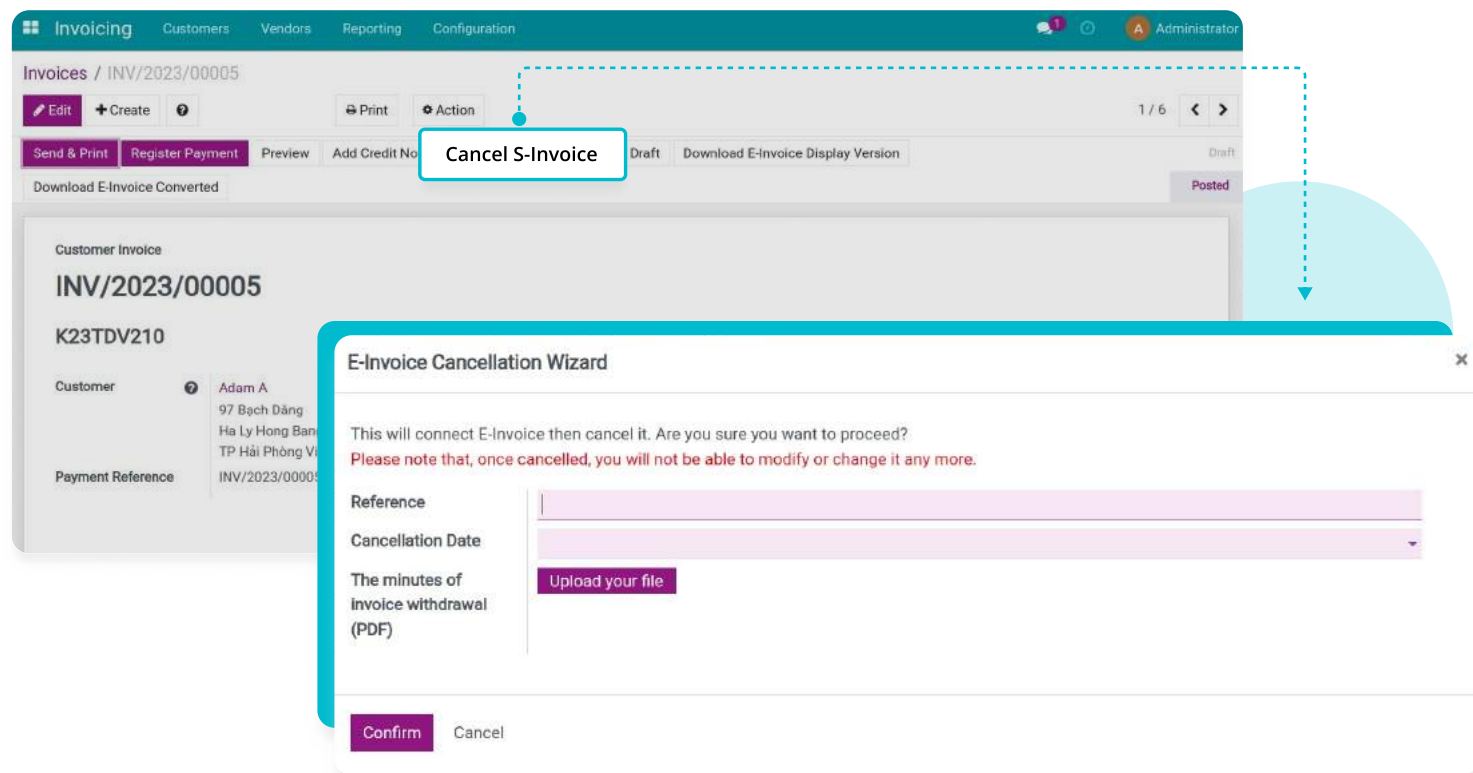


## CANCEL THE INVOICE

In the case where an E-invoice has been issued and an error is discovered, it is necessary to cancel the **E-invoice** and the **Viindoo invoice**.

### Cancel an issued E-invoice

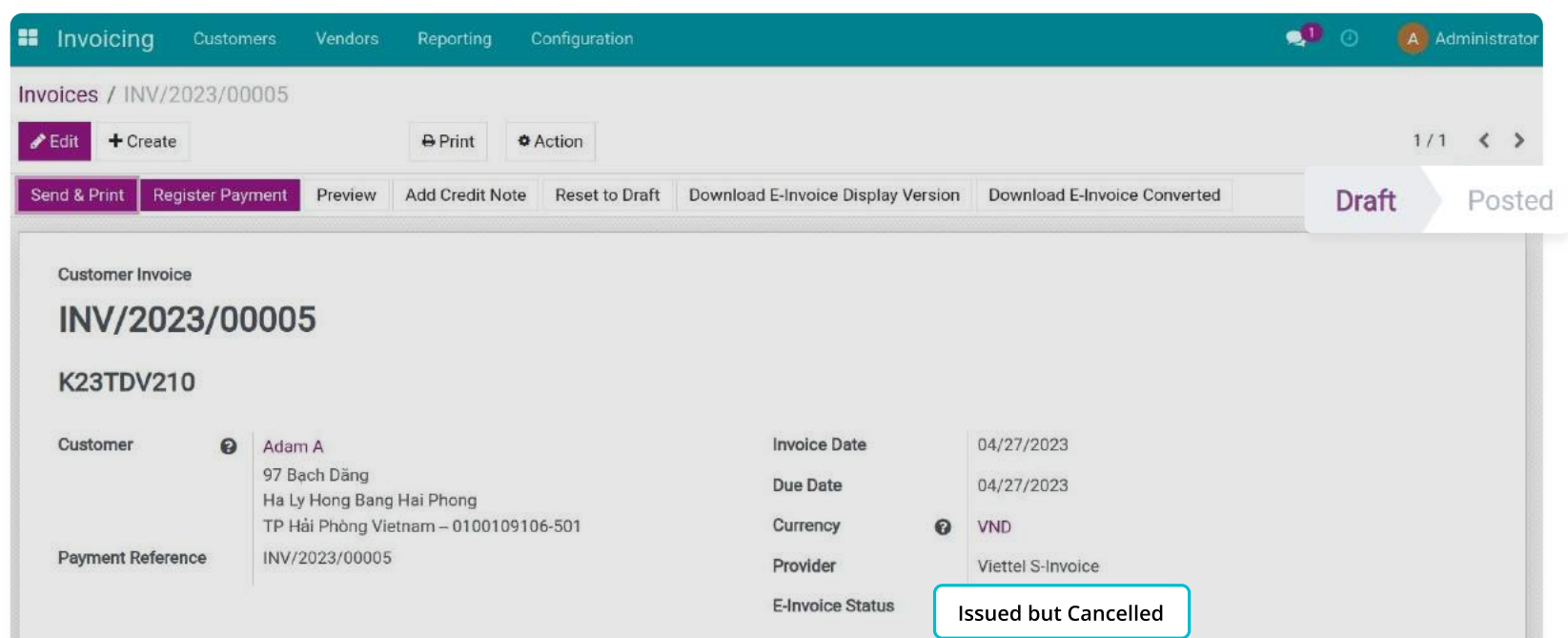
On the E-invoice view, press **Cancel E-invoice**.



A pop-up will appear, fill in the following information:

- *Reference*: Agreement number/name to cancel the invoice between two parties.
- *Cancellation Date*: Type the cancellation date of the E-invoice.
- *The minutes of invoice withdrawal (PDF)*: You can upload the related documents.

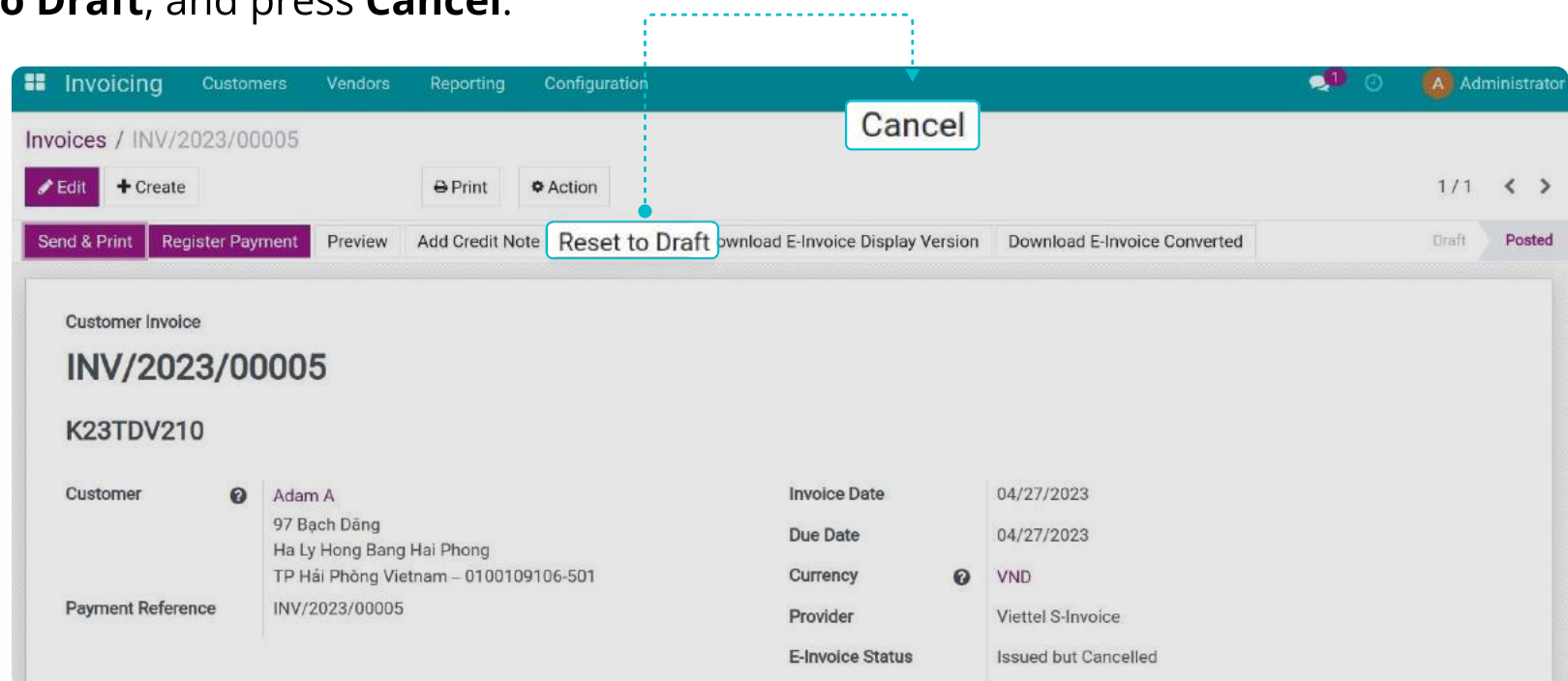
Press **Confirm**, the e-invoice status will be **Issued but Cancelled**, and the e-invoice state will be **Posted**.



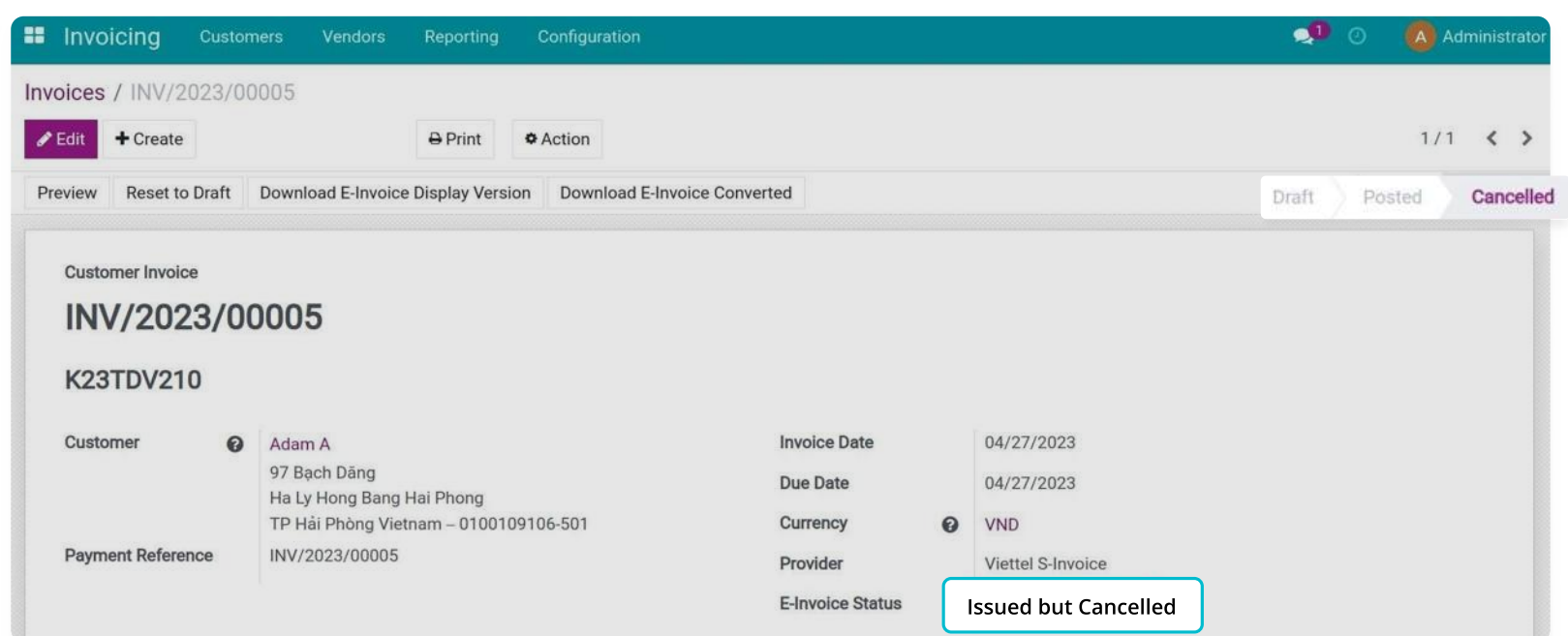
To send the error notice to the tax authority, you need to access the S-Invoice or VN-Invoice system.

## Cancel Viindoo Invoice

After cancelling the E-invoice, you can cancel the Viindoo invoice by pressing **Reset to Draft**, and press **Cancel**.



After canceling, the Viindoo invoice will have the **Cancelled** status, and the E-invoice status will be **Issued but Cancelled**.



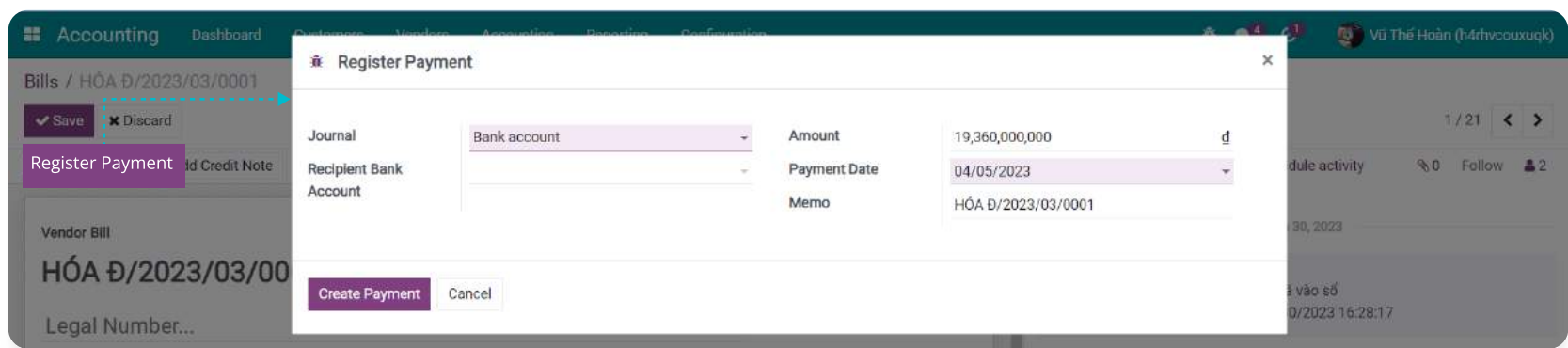
## REGISTER PAYMENT

To register payments in Viindoo, do as follows:

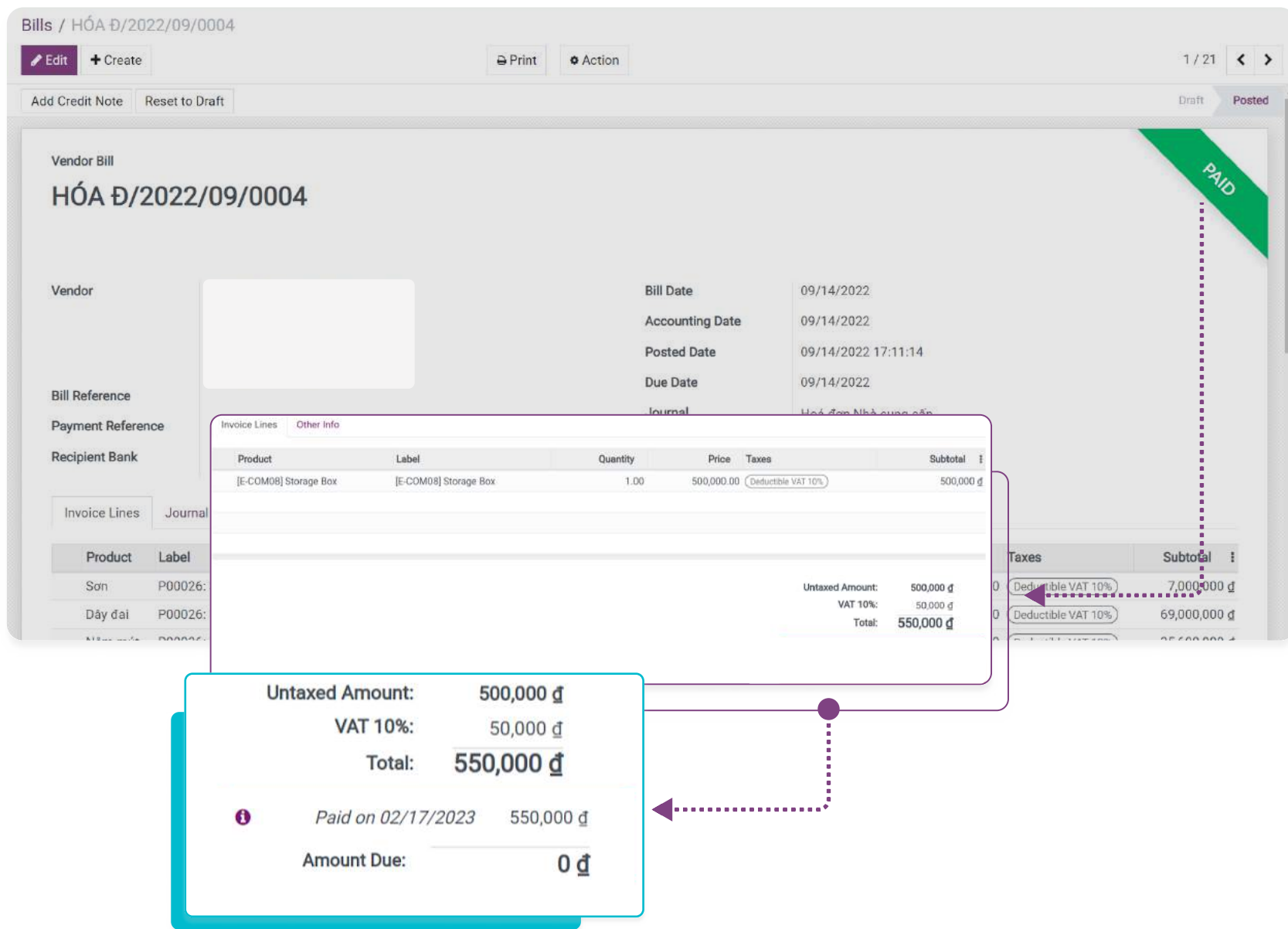
*Step 1:* On any invoice interface in the software, after confirmation, a Register Payment button will appear.

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

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



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



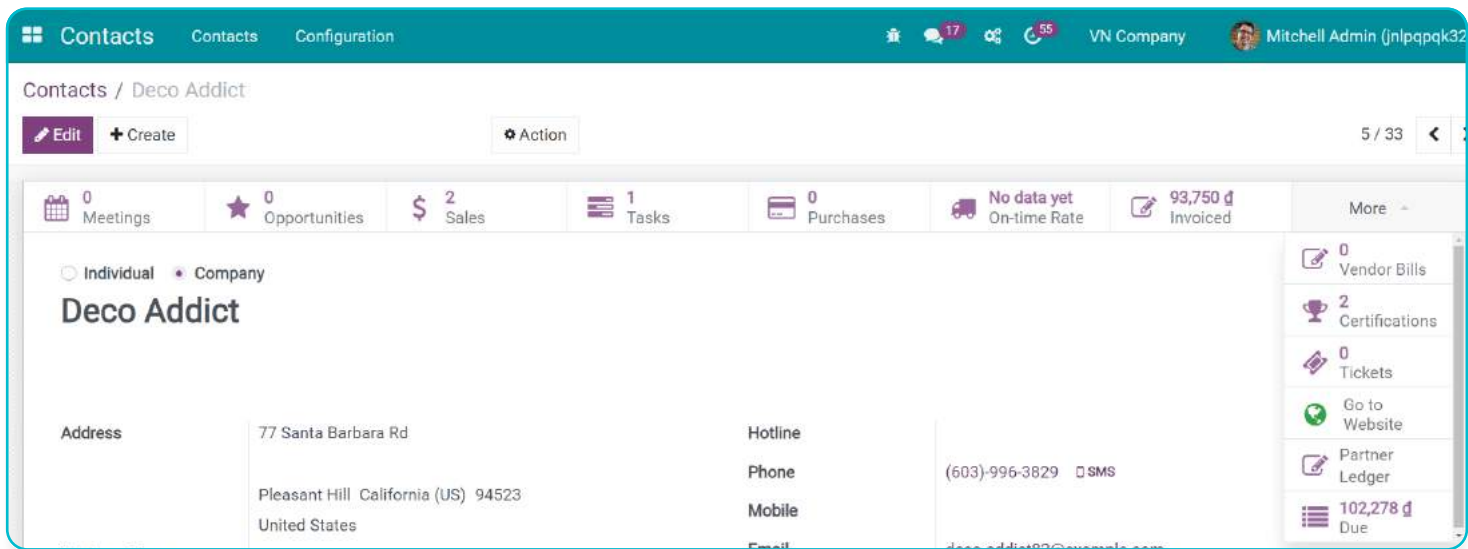
In case you need to register payments for various vendor bills/invoices at the same time in Viindoo

➡ See details at:

- Pay various distinctive bills at the same time.*

# ACCOUNTING LIABILITIES MANAGEMENT

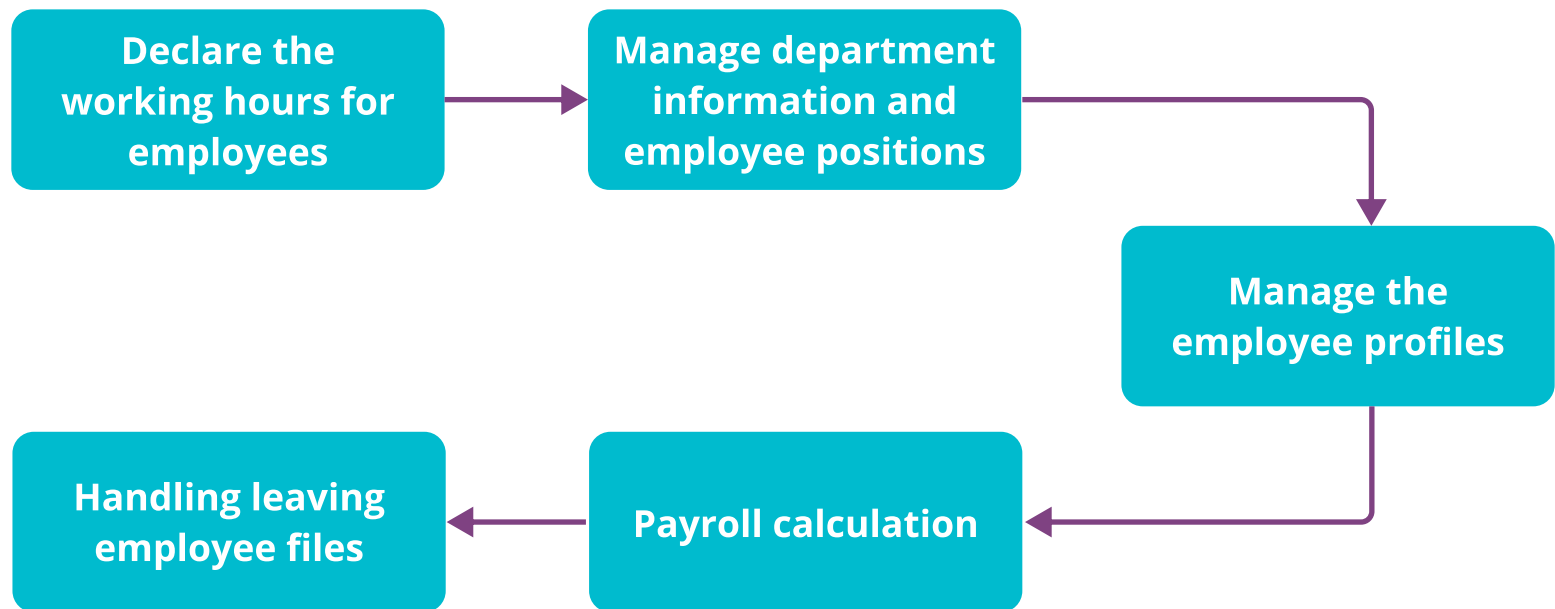
On a customer or a vendor contact, you can see their invoices and liabilities.



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

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



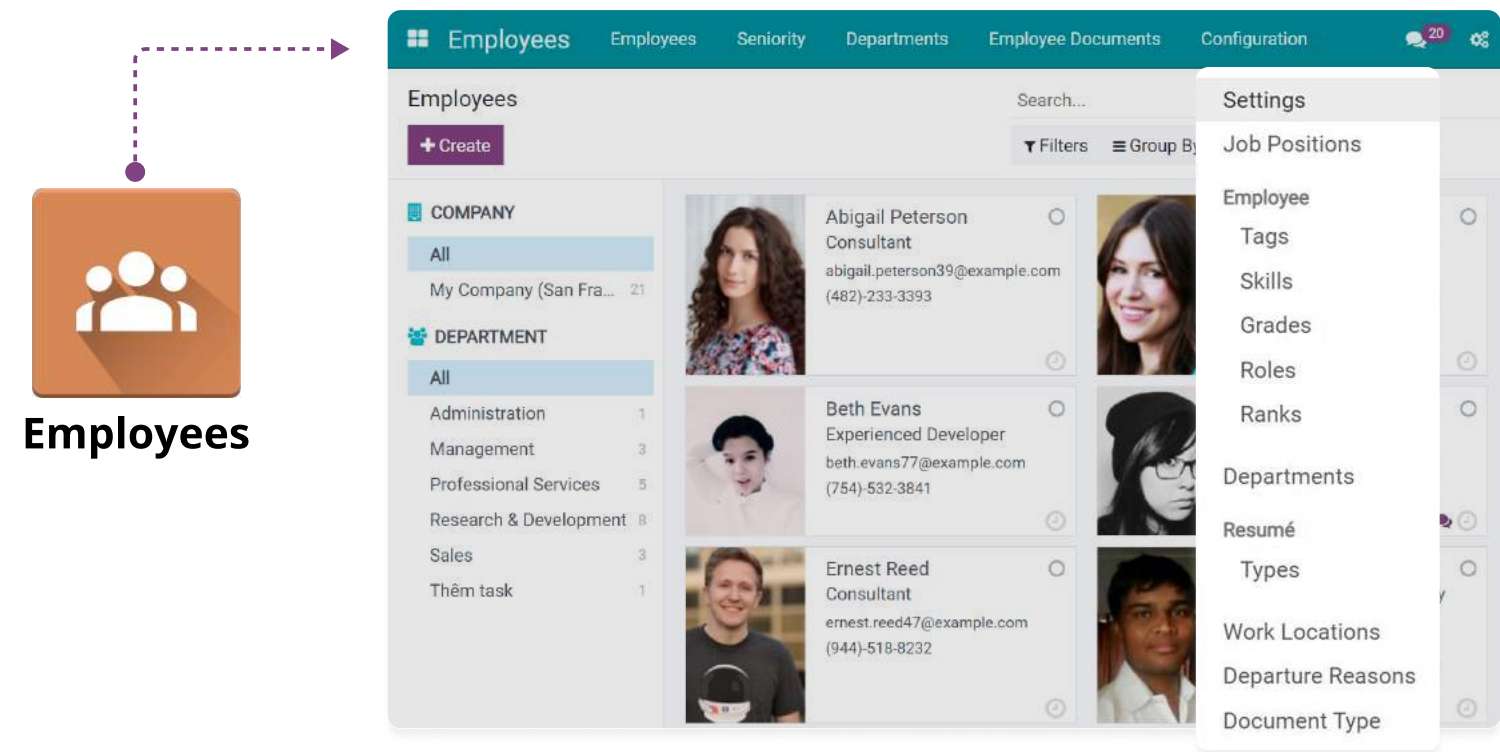


## DECLARE THE WORKING HOURS FOR EMPLOYEES

**User with administrator (Admin) rights** will declare the working hours for the whole company. Working hours can be applied to the whole company or a specific group of employees. By default, the software provides 3 main working hours:

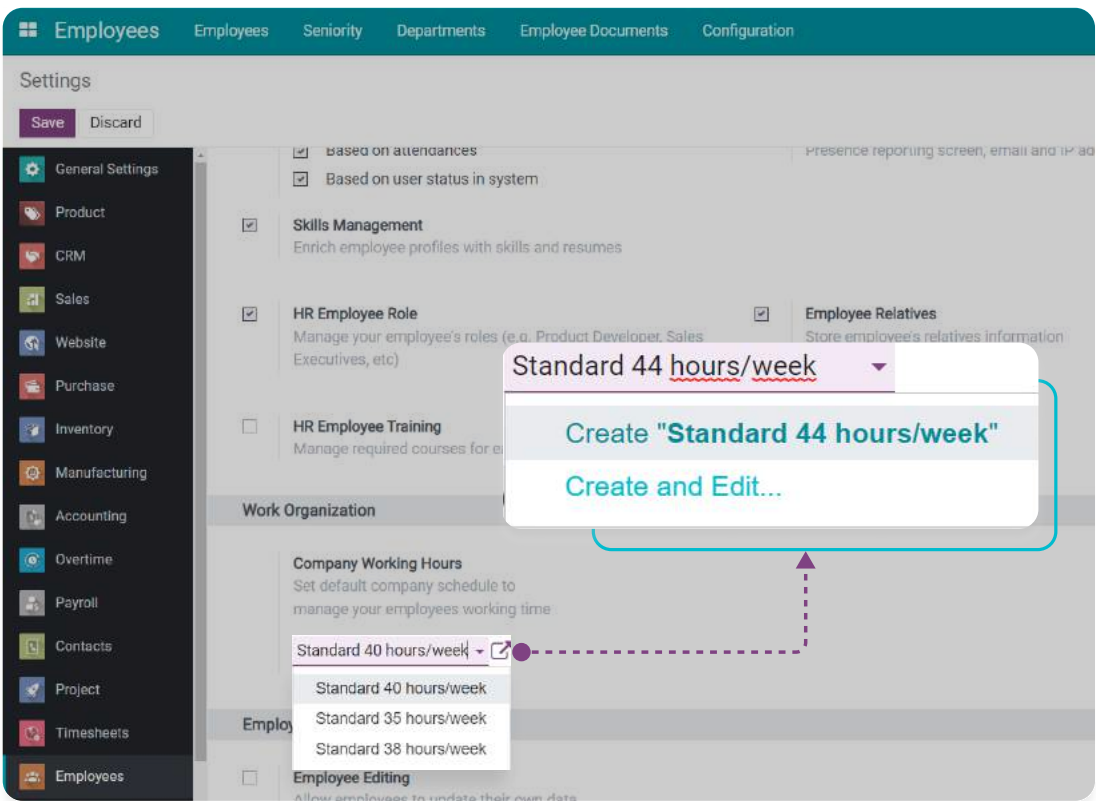
- *Standard 40 hours/week.*
- *Standard 38 hours/week.*
- *Standard 35 hours/week.*

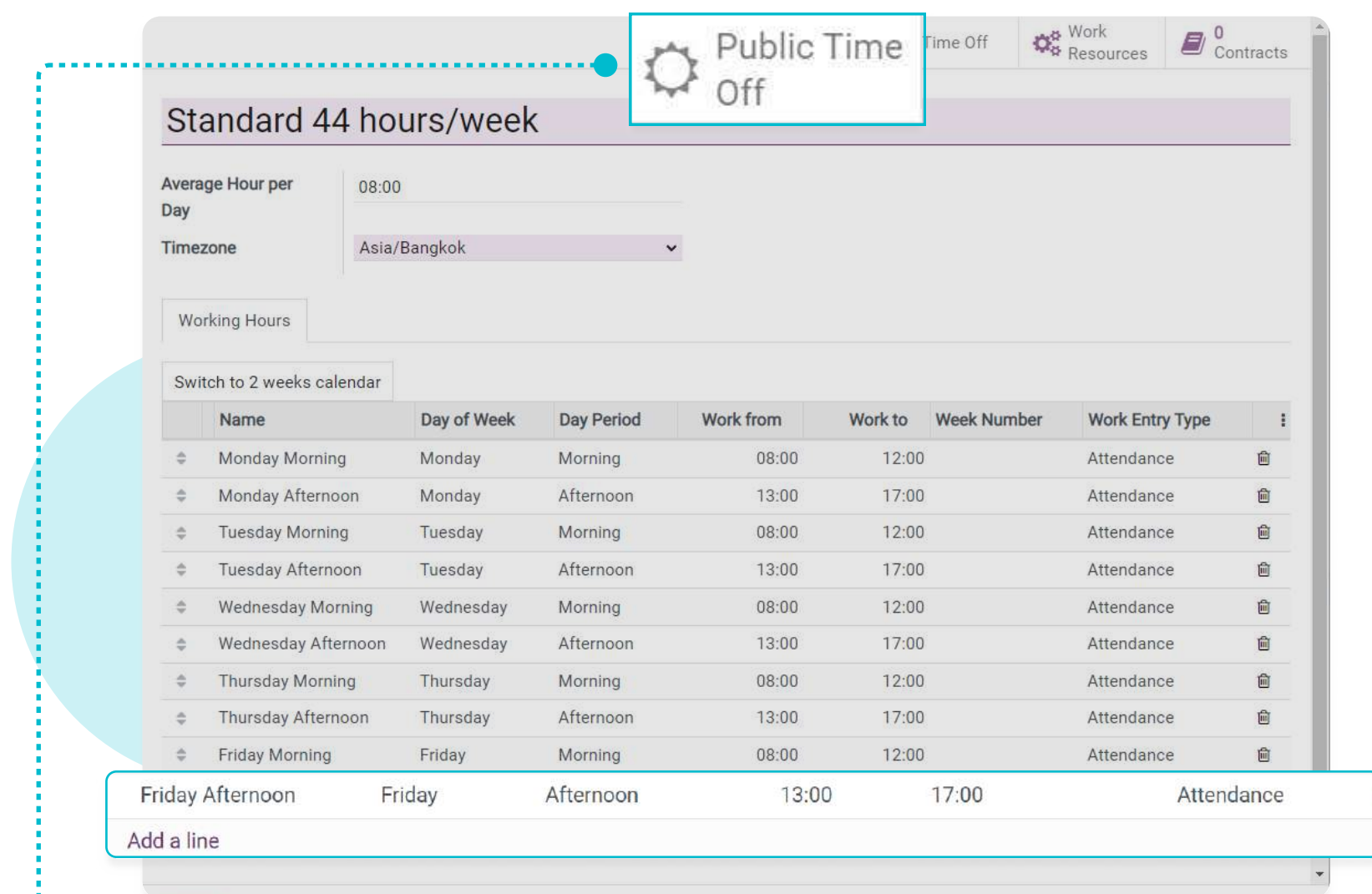
To apply the working hours for the whole company, navigate to **Employees** ► **Configuration** ► **Settings**.



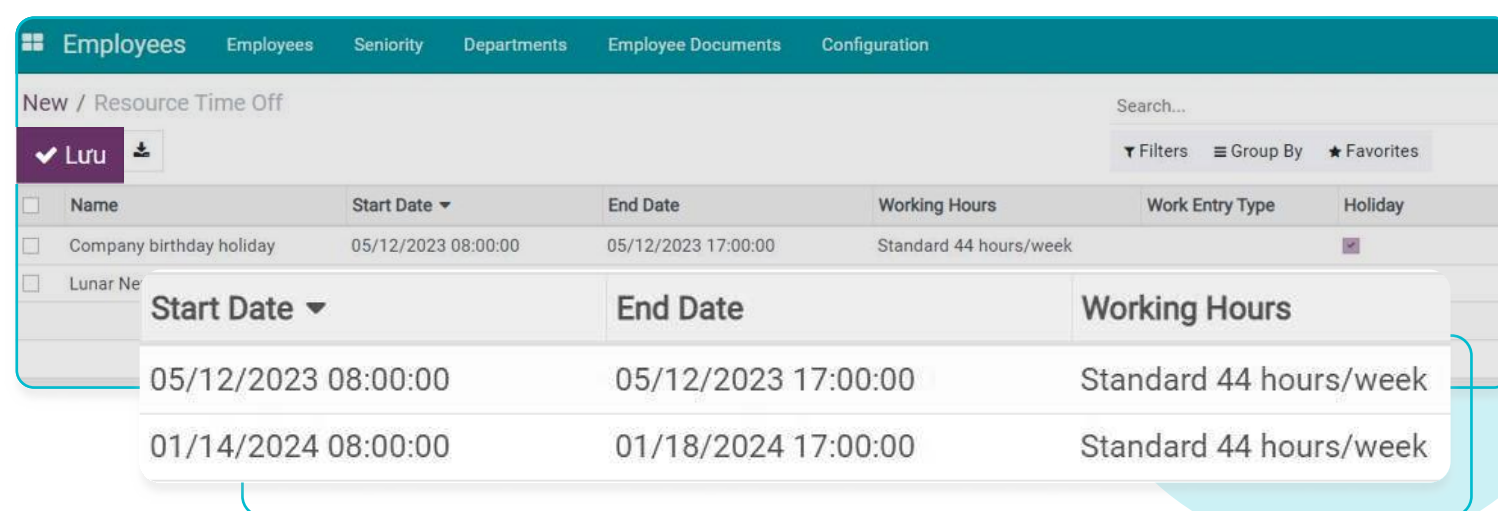
The Standard 40 hours/week is set as the default working hours. You can choose other working hours.

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





After that, edit the information for the new working hours by pressing **Add a line** to enter more working periods such as *Name*, *Day of the week*, *Day period*, *Work from*, and *Work to*, etc.



To declare holidays or anniversaries for your company, press the **Public Time Off** tab on the top right corner.

Then press **Create** to start declaring the *Start Date*, *End Date* of public time off: Press **Save** to finish.

Above is how to set up working hours for all employees on the system. However, if the employees at the company have different working hours, the HR staff can edit [the Working hours on each employee profile \(Page 134\)](#).

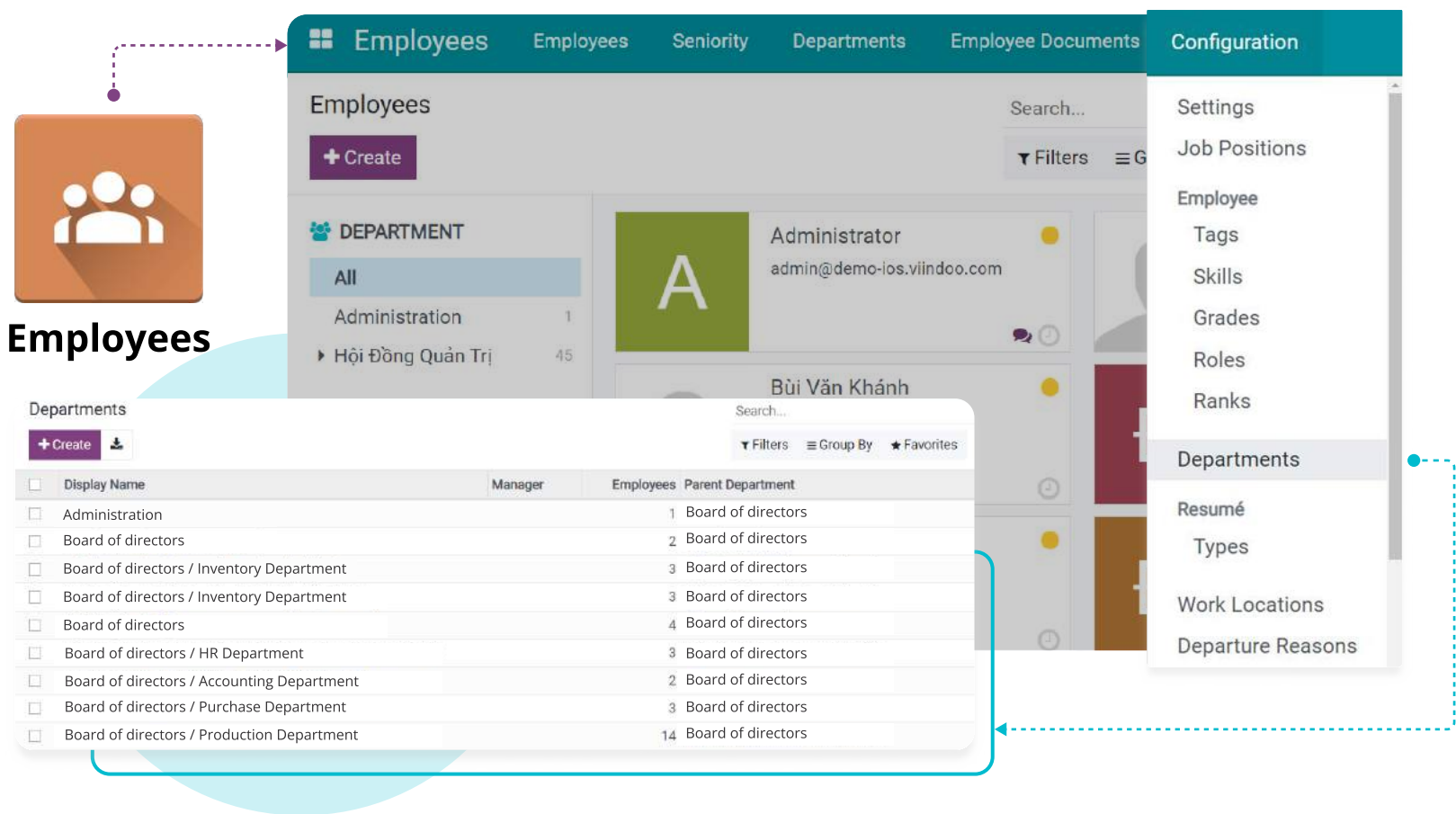


# MANAGE DEPARTMENT INFORMATION AND EMPLOYEE POSITIONS

## Create a chart of departments

The Viindoo enterprise management software allows **the HR staff** to create departments flexibly, suitable for many different types of departments, with no limit on the number and levels of departments, helping to manage, assign, and arrange work.

To create a new department, navigate to **Employees** ▸ **Configuration** ▸ **Departments** to view the list of existing departments in your company.



Press **Create** to create a new department.

Add the following information:

- *Department Name*: Add the department's name.
- *Parent Department*: Define the higher-level department of this new department.
- *Manager*: Select the department manager from the list of employees.

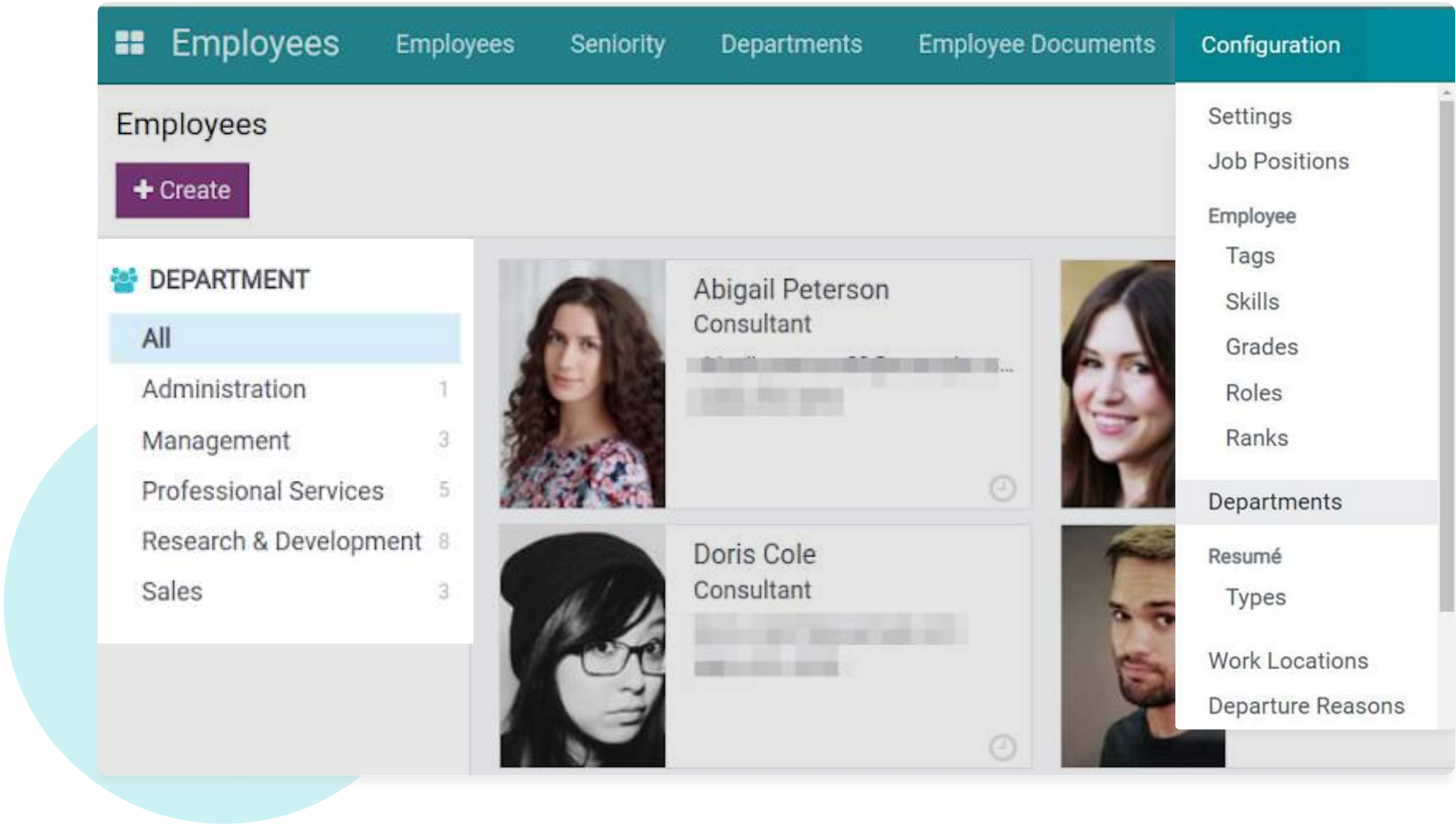
The screenshot shows the 'Departments' form in Viindoo software. At the top, there's a breadcrumb trail: 'Departments / Hội Đồng Quản Trị / Ban Giám Đốc / Bộ phận Kho'. Below it, there are 'Save' and 'Discard' buttons. The form has several fields: 'Department Name' (with a value 'Bộ phận Kho' and a language dropdown 'EN'), 'Parent Department' (with a value 'Hội Đồng Quản Trị / Ban Giám Đốc' and a dropdown arrow), 'Manager' (with a dropdown arrow), and 'Timesheet Approval' (with a checkbox). Below these fields, there's a 'Department Register' section with a table. The table has columns for 'Contribution Register', 'Department', and 'Partner'. There's an 'Add a line' button below the table.

Contribution Register	Department	Partner
Add a line		

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

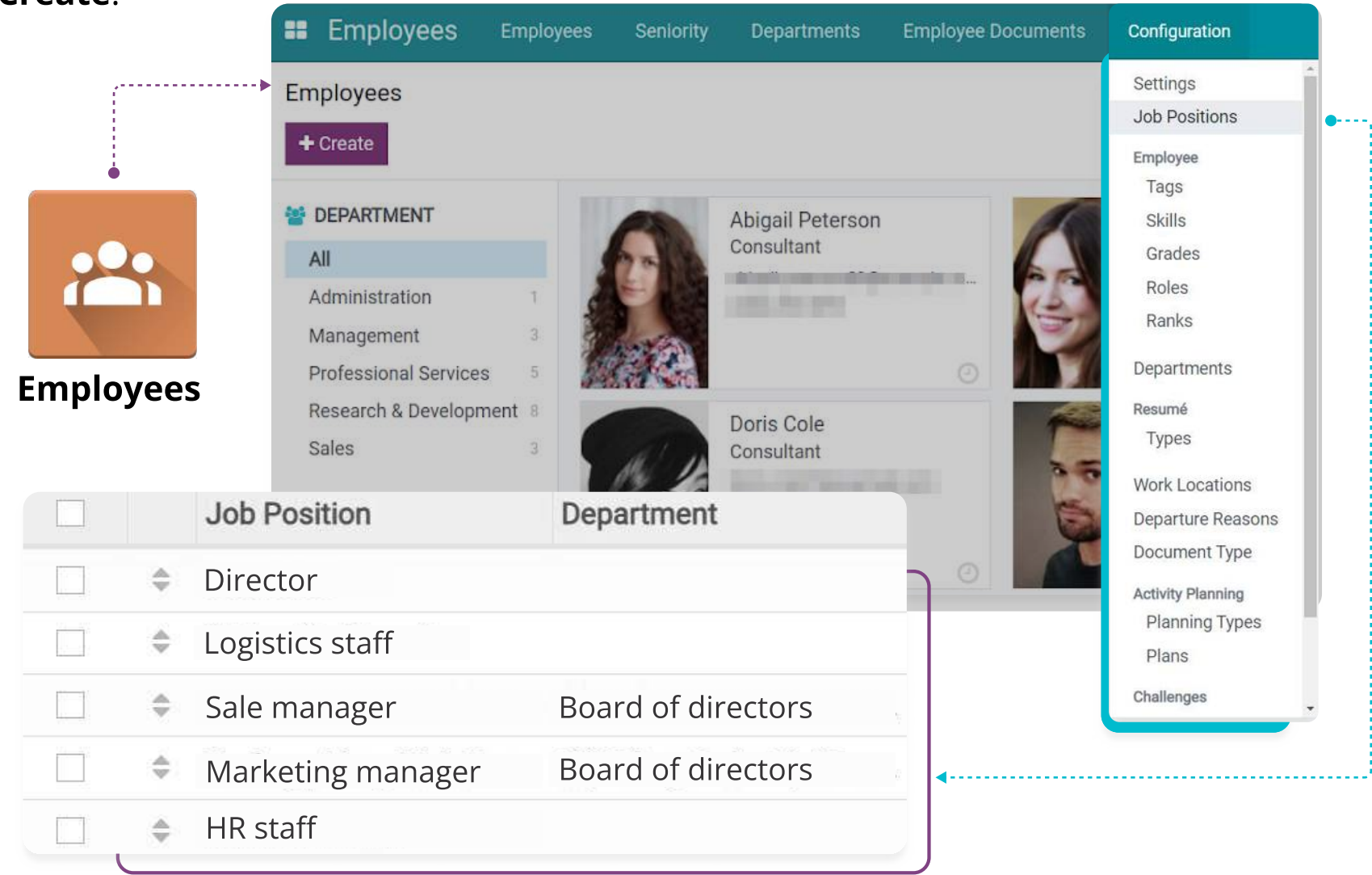


The department tree is also displayed on the employee list, you can click on each department to see the list of its employees.



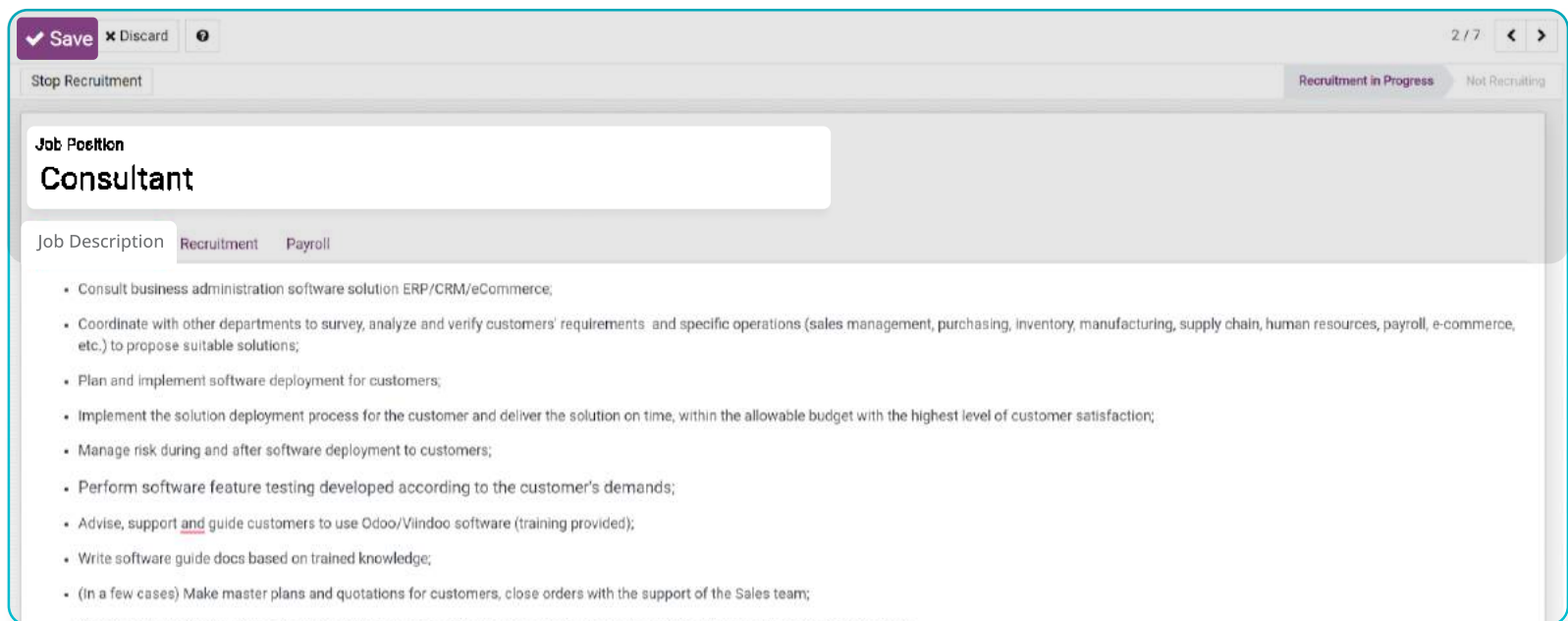
### Create job positions

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



On the Job Positions view, add the following information:

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



Save Discard

Stop Recruitment Recruitment in Progress Not Recruiting

**Job Position**

**Consultant**

**Job Description** Recruitment Payroll

- Consult business administration software solution ERP/CRM/eCommerce;
- Coordinate with other departments to survey, analyze and verify customers' requirements and specific operations (sales management, purchasing, inventory, manufacturing, supply chain, human resources, payroll, e-commerce, etc.) to propose suitable solutions;
- Plan and implement software deployment for customers;
- Implement the solution deployment process for the customer and deliver the solution on time, within the allowable budget with the highest level of customer satisfaction;
- Manage risk during and after software deployment to customers;
- Perform software feature testing developed according to the customer's demands;
- Advise, support and guide customers to use Odoo/Viindoo software (training provided);
- Write software guide docs based on trained knowledge;
- (In a few cases) Make master plans and quotations for customers, close orders with the support of the Sales team;

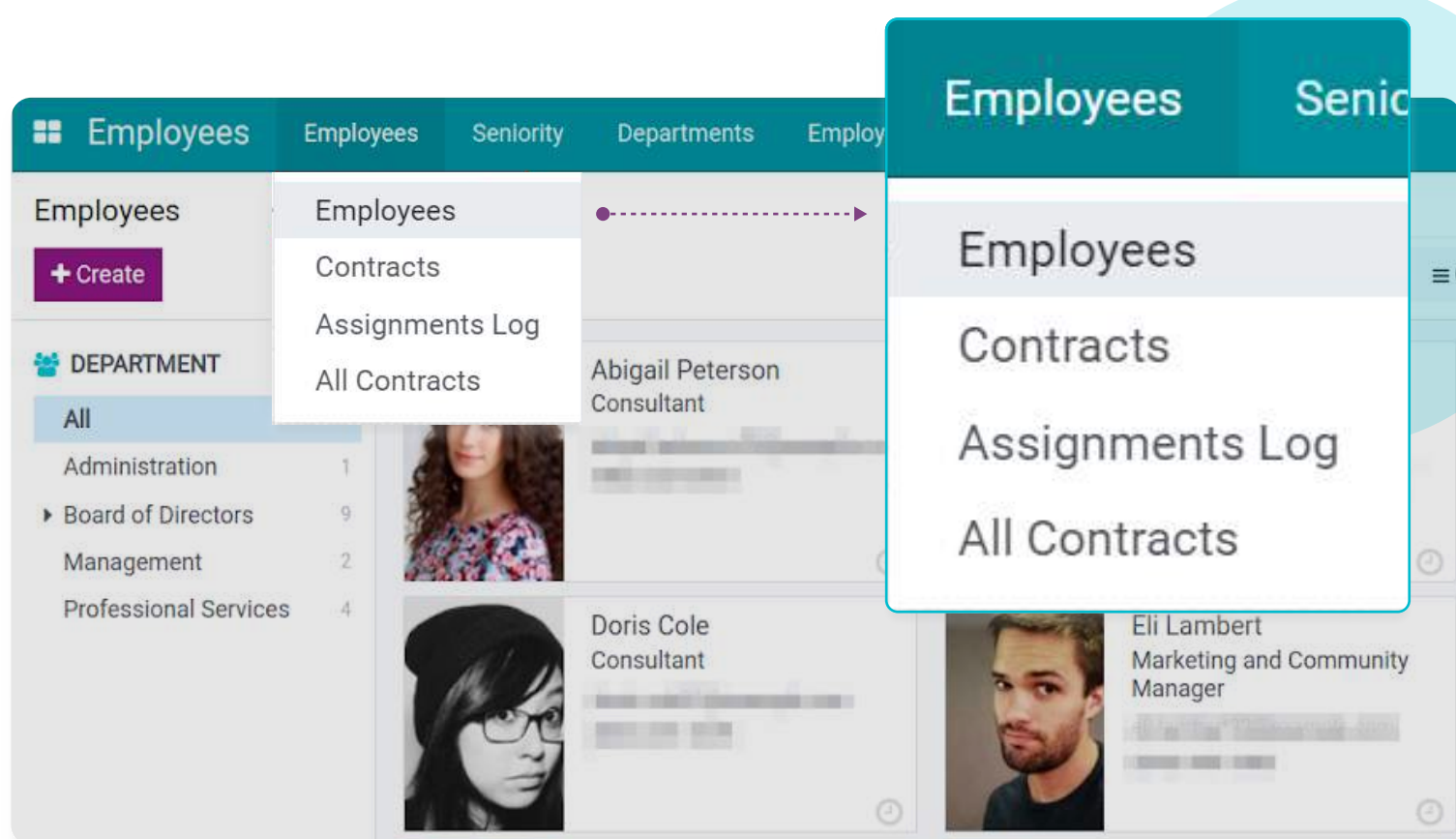
Then, press **Save**.

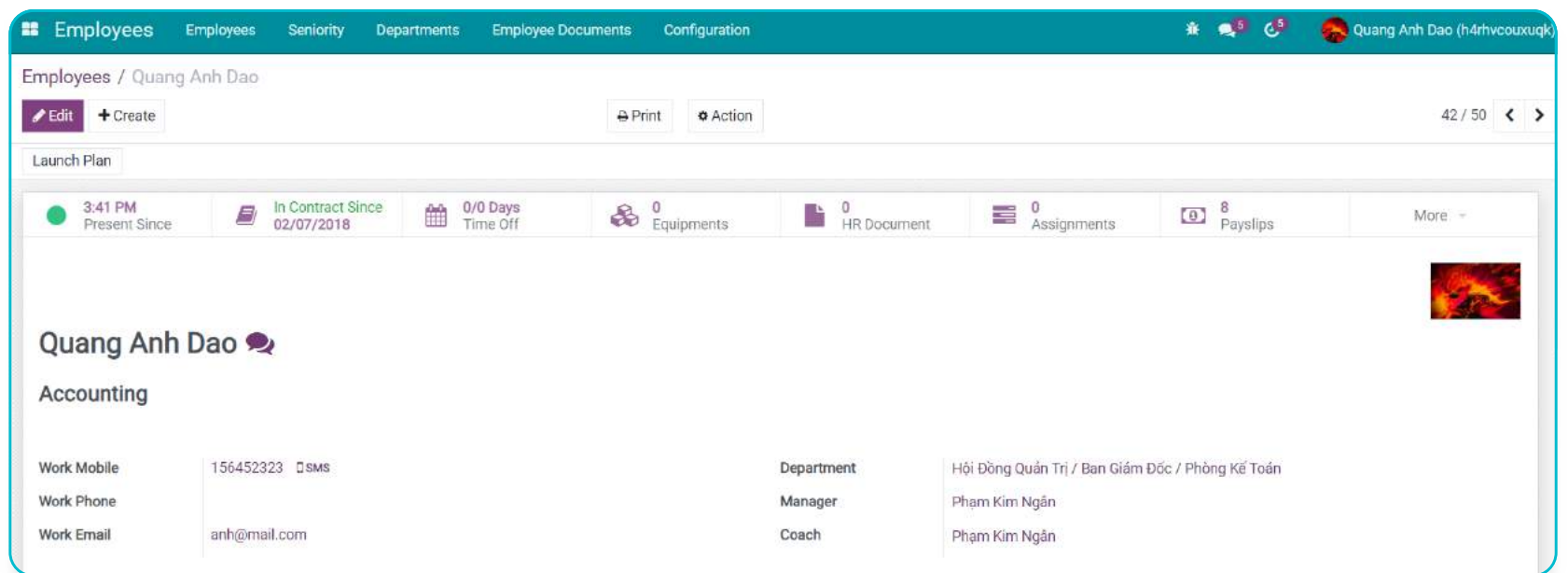
## MANAGE THE EMPLOYEE PROFILES

### Declare information on employee profiles

An employee profile is a place to store all employee information, such as job position, personal information, work experience, etc. **The HR staff** will be responsible for managing employee records. To create a new employee record in the system, do the following:

Navigate to **Employees** ▶ **Employees** ▶ **Employees** ▶ **Create**:

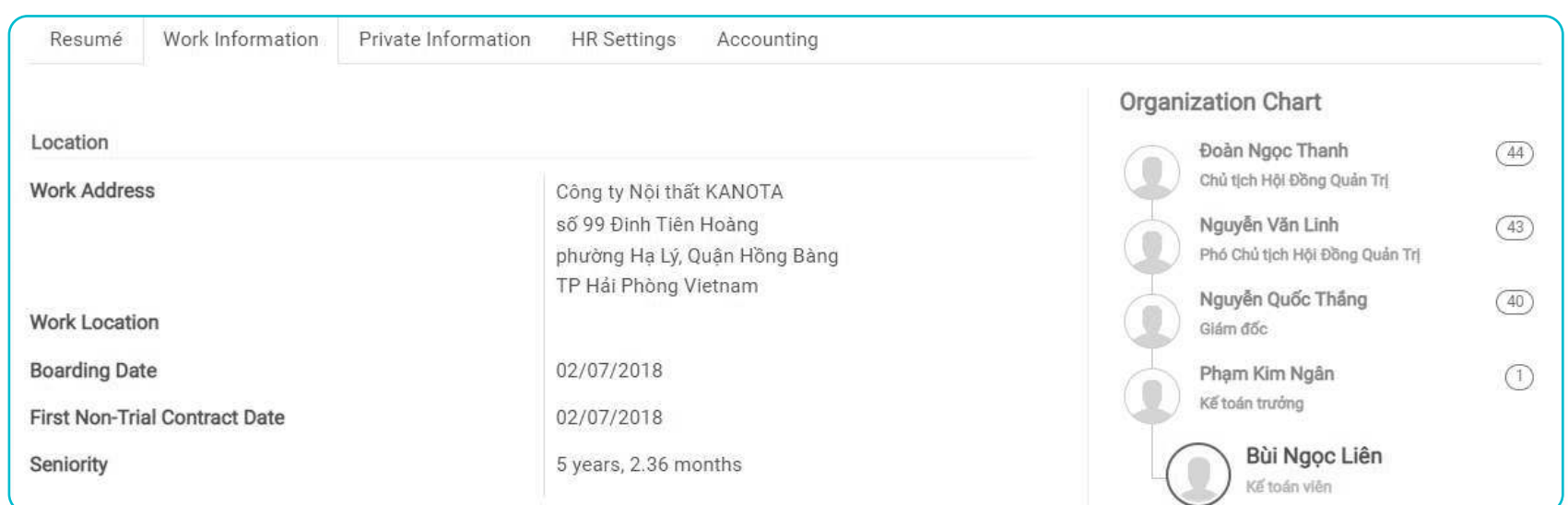




On the **Employee** view, add the following necessary information:

- *Employee's Name*: Employee's first and last name.
- *Image*: You can add a profile picture of your employee to facilitate identifying each other in daily interactions.
- *Department*: Employee's department.
- *Manager/Coach*: By default, the head of the department where this employee is working will be set as their manager and coach. However, you can select another person as the line manager or coach of this employee.

### The Work Information tab



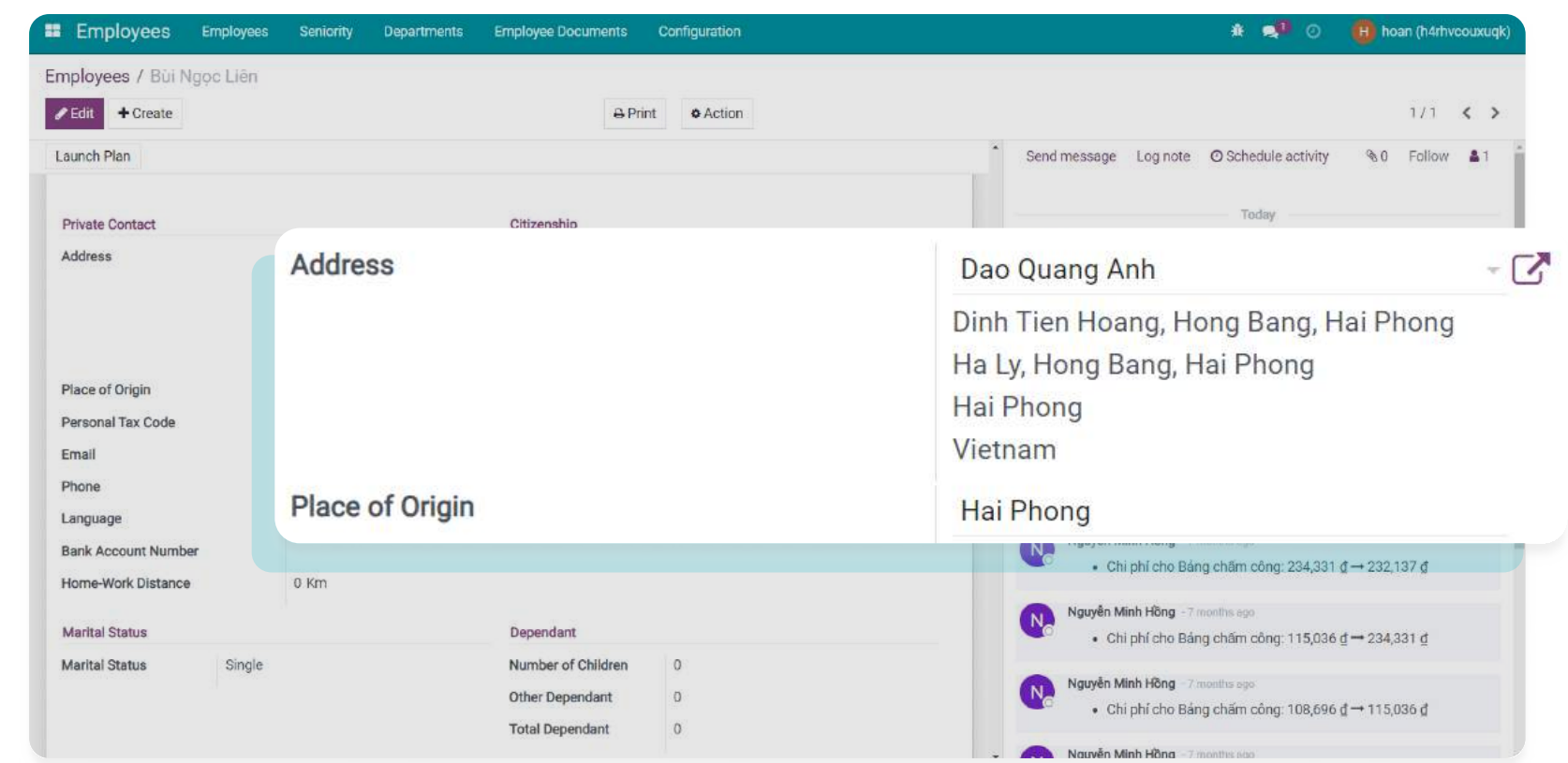
- *Work Address*: Your company's address is displayed by default.
- *Work Location*: A place where employees work. For example, the 6th floor or 10th floor of the company.
- *Organization Chart*: This shows the employee's position in the organizational structure.



- *Schedule:*
  - *Working Hours:* The company's working hours are selected by default. However, the HR staff can adjust this information in accordance with the labor contract of each employee.
  - *Timezone:* Select the timezone of the geographical location where this employee is working.

*Private Information tab*

All personal information about an employee such as private contact information, personal identification information, marital status, etc., are stored in this tab. Saving all the important information about your employees will facilitate tracking and searching for information whenever needed.



On the other hand, don't forget to add the relatives and dependents of each employee to the payroll and personal income tax calculations in the future.

Relatives						
Relative Contact	Relation Type	Email	Phone	Mobile	Tax ID	Is Dependant
Bùi Đức Huy	Father	huybd@mail.com	+842862616139			<input type="checkbox"/>
Add a line						



## HR Settings tab

Resumé	Work Information	Received Badges	Private Information	HR Settings	Accounting
<b>Status</b>			<b>Attendance/Point of Sale</b>		
<b>Employee Type</b>	Employee		<b>PIN Code</b>		
<b>First Contract Date</b>	02/07/2018		<b>Badge ID</b>	Generate	
<b>Related User</b>	Đào Quang Anh				

In this tab, you can link to other HR-related information about this employee, especially the following:

- *Employee Type*: Define whether this employee is a full-time employee, an intern, etc.
- *Related User*: To link a specific system user account (if available) with this employee.

➔ See details at:

- Create new employee.

## Employee Documents

**The HR staff** will store, classify, and manage employee documents such as social security cards, ID cards, insurance books, etc. To create an employee document, in the **Employees** app, go to the **Employee Documents** menu and then press **Create**.

Employees Employees Seniority Departments Employee Documents Configuration

Employee Document / National ID / Đặng Trọng An

Save Discard

1 / 1

**Identity Document**

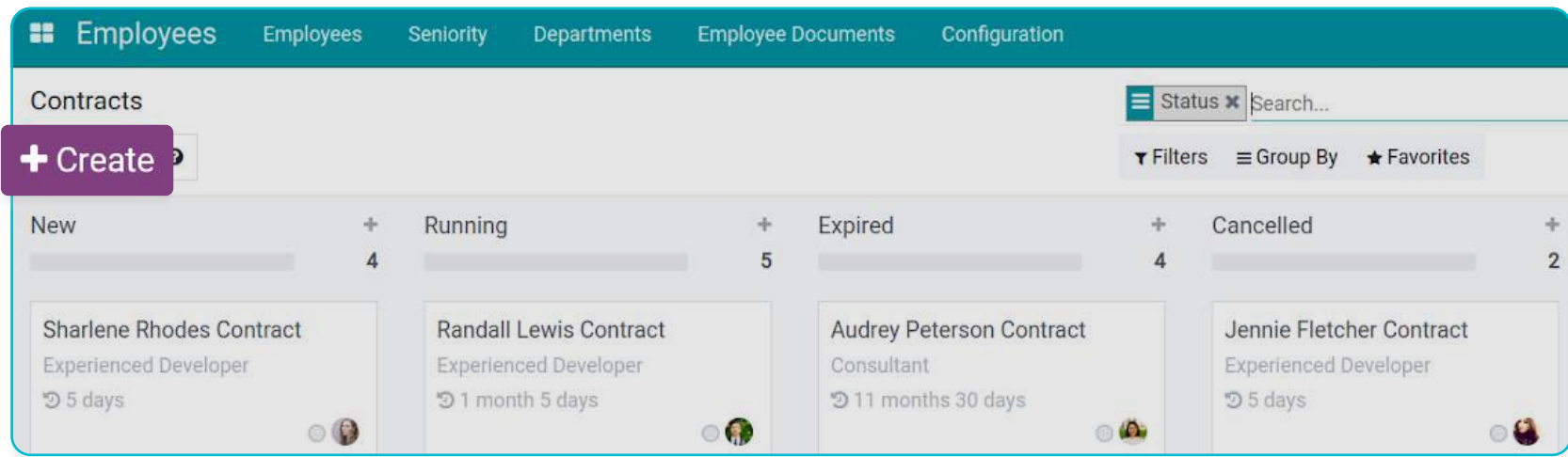
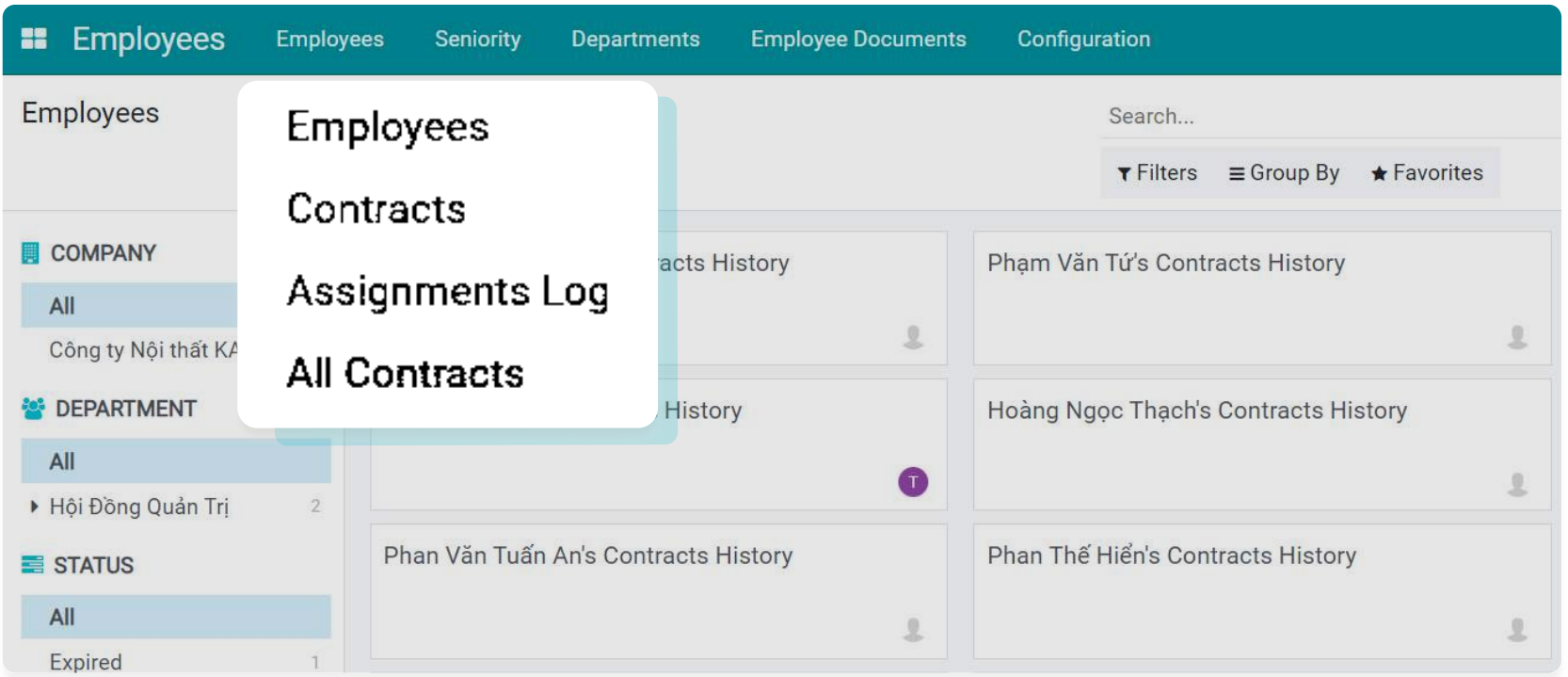
Document Type	National ID	Issued By	Bộ Công An
Being kept by	Employee	Place of Issue	Việt Nam
Employee	Đặng Trọng An	Issue Date	02/01/2020
Document Manager	Nguyễn Minh Hồng	Expiration Date	02/07/2029
		Days to Notify	45

From here, you need to add the employee's document information, such as title, document number, document type, who is keeping this document, to whom this document belongs, expiration date, etc., then press **Save** to complete.

Manage the employee contract

Create an employee contract

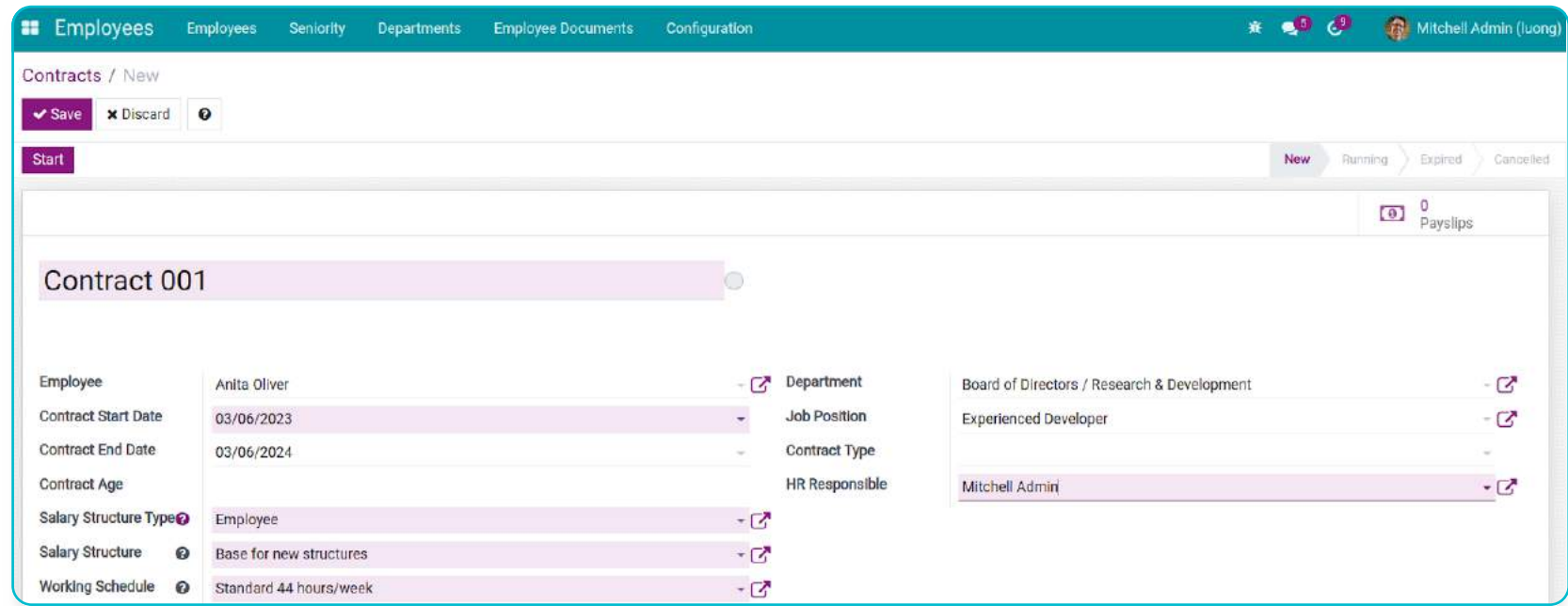
To create a new contract, navigate to **Employees** ▶ **Employees** ▶ **All Contracts** and press **Create**.



You add the following information for the contract:

Basic information

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

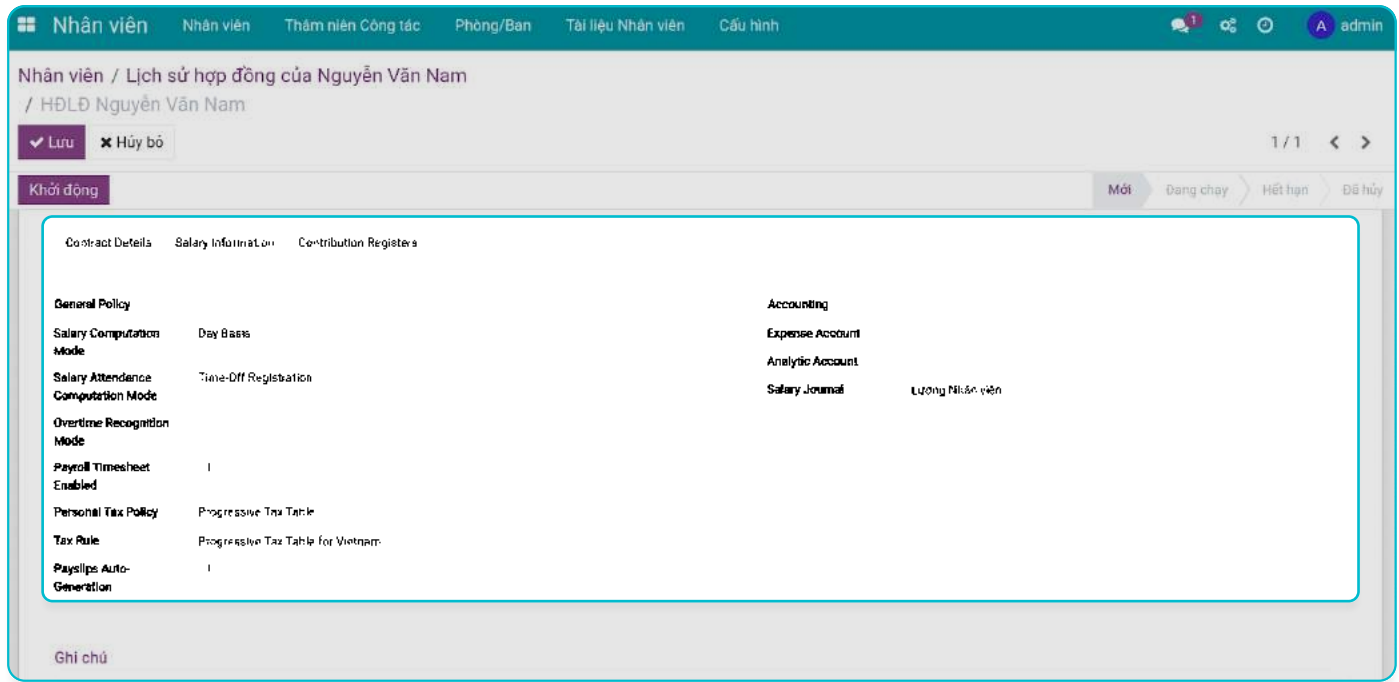


➔ See details at:

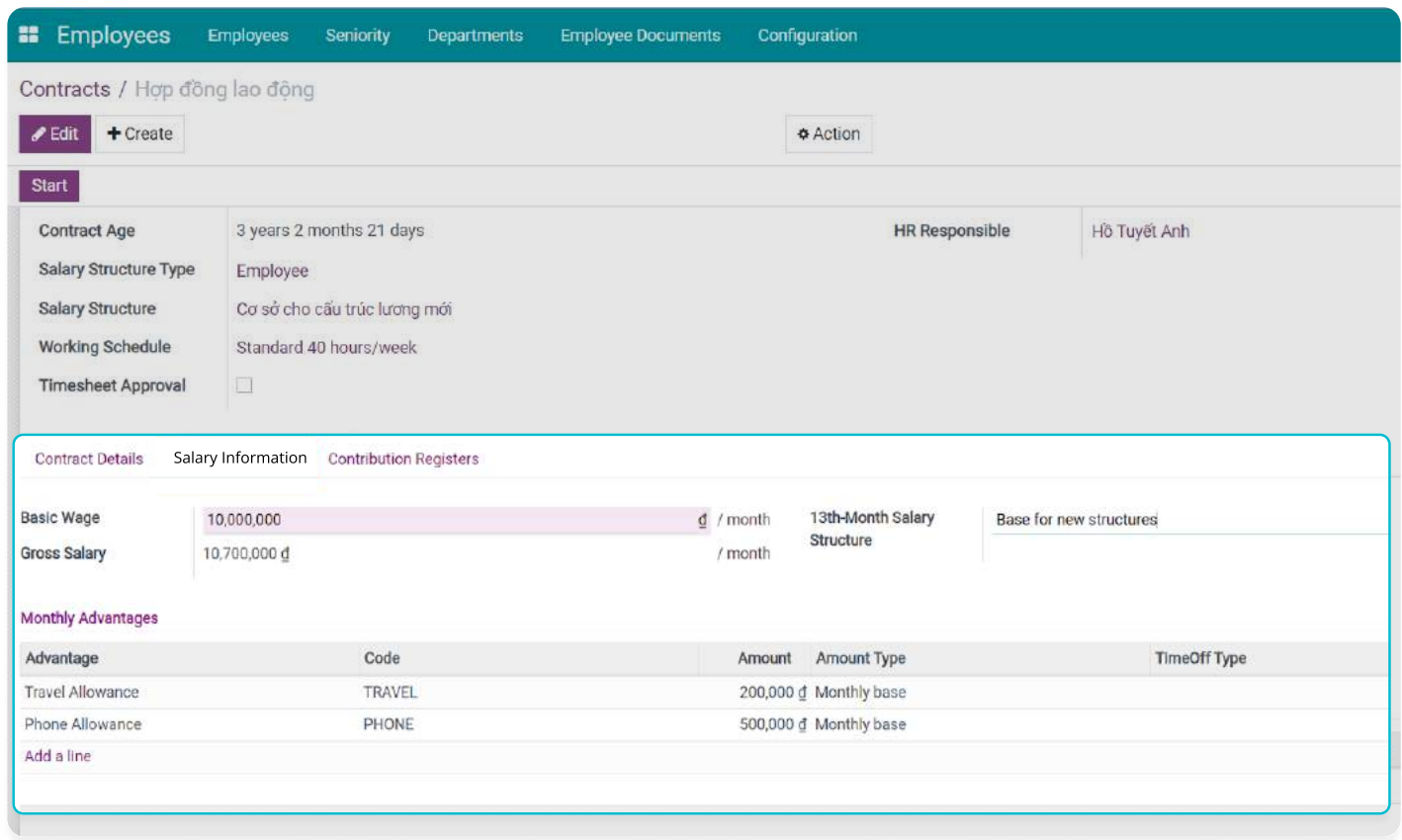
- Basic information filling instructions on the employment ccontract.

Contract details

Use the default system settings. You should choose the correct personal income tax calculation rules for each employee.



Salary Information



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

- *Basic Wage*: The base wage of employees.
- *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

Click on **Payroll Contribution Types** to start setting up the salary contribution types for each employee.

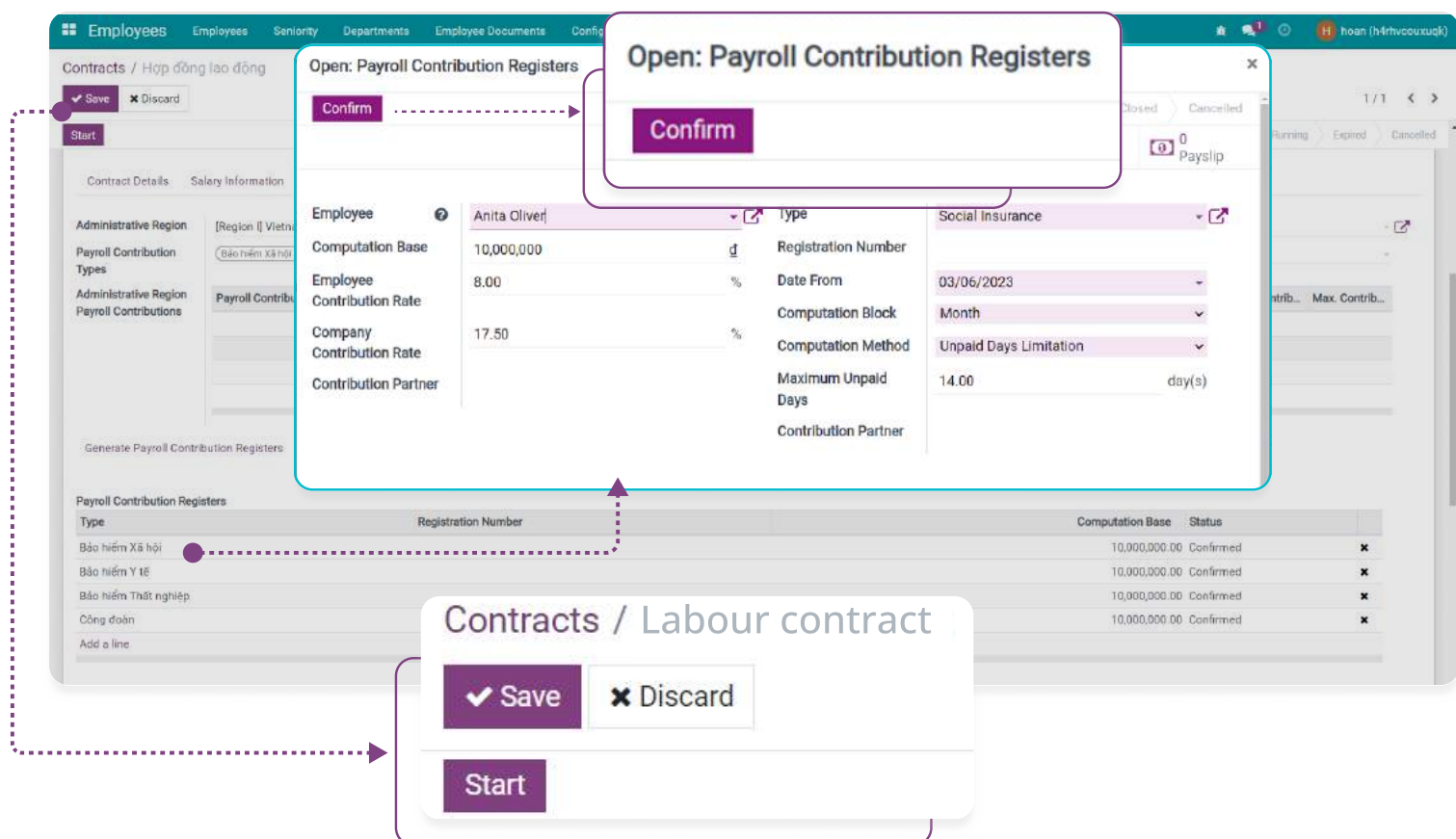
The screenshot shows the 'Contribution Registers' form within the 'Employees' module. The form has a teal header with navigation tabs: 'Employees', 'Seniority', 'Departments', 'Employee Documents', and 'Configuration'. Below the header, the breadcrumb 'Contracts / Hợp đồng lao động' is visible. The form includes a 'Save' button (purple) and a 'Discard' button (grey). A 'Start' button is also present. The main content area is divided into three tabs: 'Contract Details', 'Salary Information', and 'Contribution Registers'. The 'Contribution Registers' tab is active, showing fields for 'Administrative Region' (set to '[Region I] Vietnam') and 'Payroll Contribution Types' (with four selected options: 'Bảo hiểm Xã hội', 'Bảo hiểm Y tế', 'Bảo hiểm Thất nghiệp', and 'Công đoàn'). Below these fields, there is a table with columns for 'Administrative Region', 'Payroll Contribution Type', and four columns for contribution amounts (Max. Contrib..., Min. Contribu..., Max. Contrib..., Max. Contrib...). A 'Generate Payroll Contribution Registers' button is located at the bottom of the form.

To continue, press **Generate Payroll Contribution Registers**:

This screenshot shows the same 'Contribution Registers' form as the previous one, but with the 'Generate Payroll Contribution Registers' button highlighted in a blue box at the bottom. The form's layout and content are identical to the previous screenshot, including the teal header, navigation tabs, breadcrumb, buttons, and the active 'Contribution Registers' tab with its respective fields and table.

The system will automatically generate a draft of payroll contribution registers for employees based on the contribution types you have selected. Click on each line to view detailed information of each contribution type and adjust if necessary, then press **Confirm**.





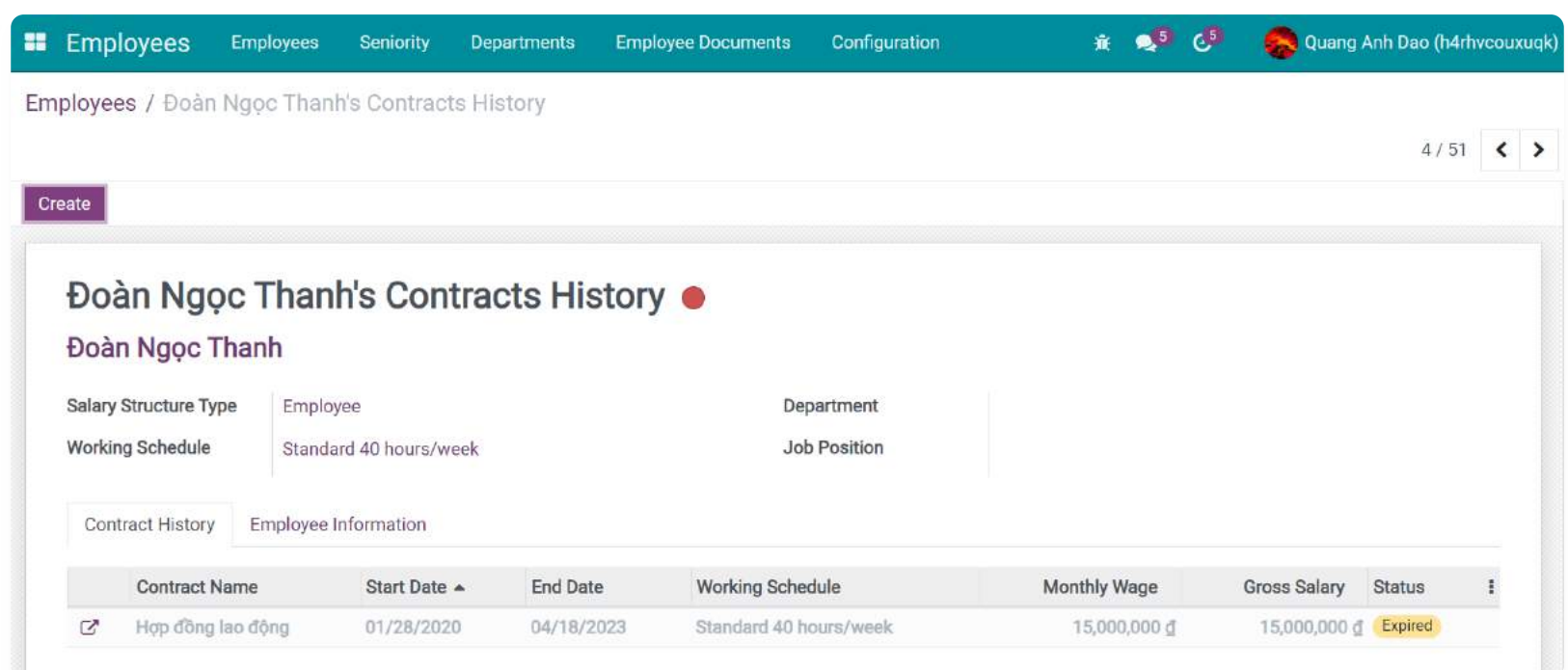
Once all of the important information is configured, click on the **Start** button to begin the effective time of this contract.

➔ See details at:

- [Create labour contract.](#)

### Track the employment contract history of employees

**The HR staff** can view all the contracts related to an employee and track the adjustment history of an employee contract by navigating to **Employees** ▶ **Employees** ▶ **Contracts** and selecting a specific employee.



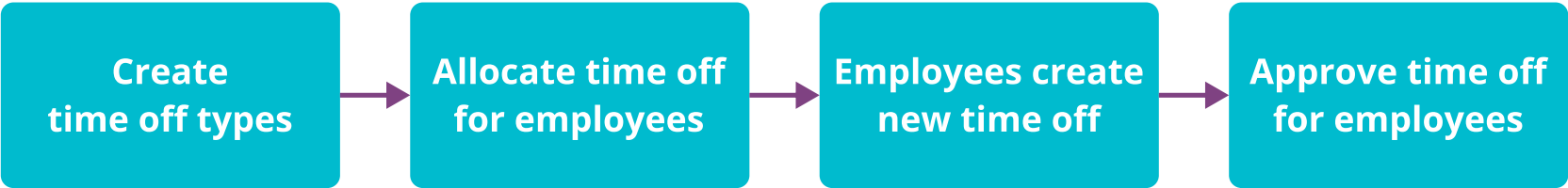
Here, you can see all the contracts that have been signed with this employee and their status. In addition, you can also see changes related to the employee's salary in each contract and quickly create a new contract by clicking the **Create** button.

PAYROLL CALCULATION

Manage working days

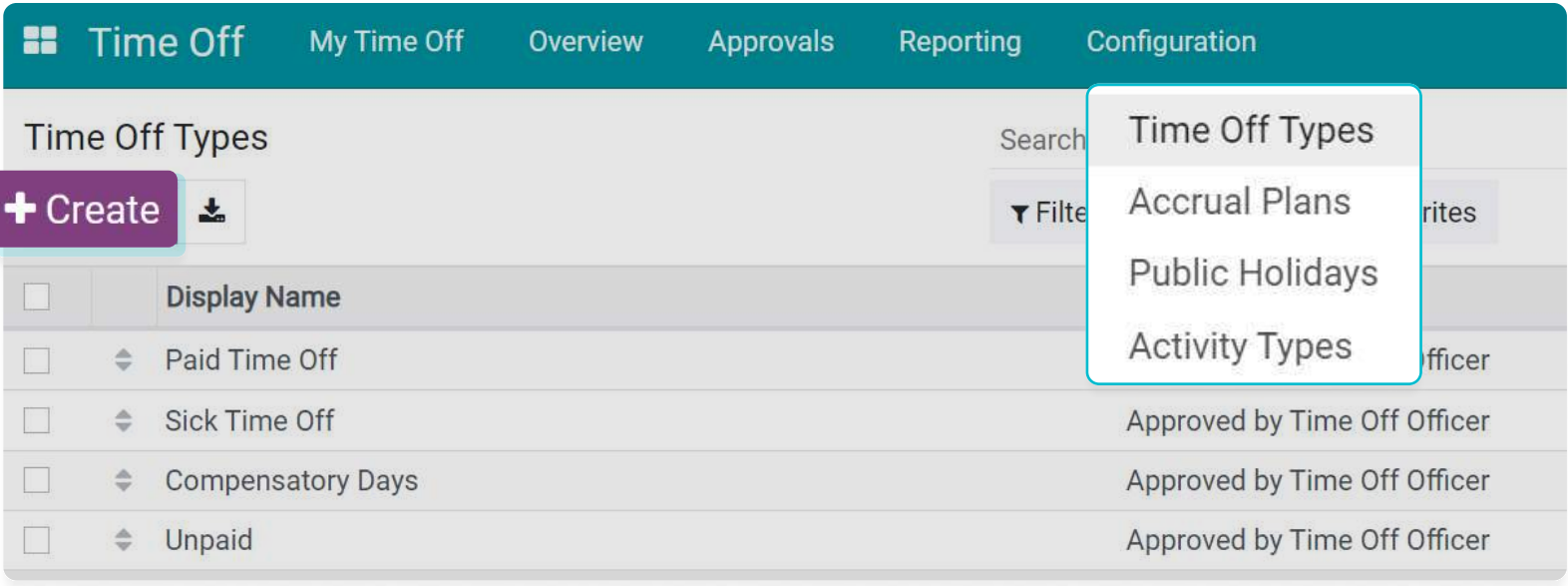


Manage time off



Create time off types

The **HR staff** create time off types in the system following the current time off types of the company. Usually, companies have different types of time off such as paid time off, sick leave, unpaid leave, etc. By default, Viindoo software sets up some popular time off types. Navigate to **Time Off** ► **Configuration** ► **Time Off Types** to view and add or edit these time off types to suit your company policies.



Click **Create** to create new time off types or directly click on the existing time off styles to edit.

In the **Time Off Requests** section, add the following information:

- *Approval:* Select the suitable approval level for this time off type. For example, if for this certain time off type, the employee needs approval from both their direct manager and the HR officer, then you should select **By Employee's Approver and Time Off Officer**.
- *Responsible Time Off Officer:* Select a responsible HR staff as the approver of this time off type if required. In addition, the selected person will also be responsible for allocating the number of days off of this time off type to the employee.
- Set the **Take Time Off in Day, Hour, or Minimum Time Off Duration** for this type.

In the **Allocation Requests** section, configure the time off allocation rule according to your business' policies. For example:

- *Situation 1:* Employees can request time off without any duration limitation:
  - *Requires allocation:* No limit.
  - *Employee Requests:* Extra Days Requests Allowed.
  - *Approval:* Approved by Time Off Officer.
- *Situation 2:* Employees can only request time off within the number of allocated days off:
  - *Requires allocation:* Yes.
  - *Employee Requests:* Not Allowed.
  - *Approval:* Set by Time Off Officer.

## Allocate time off for employees

The **HR staff** allocate time off for employees according to state regulations and company policies by navigating to **Time off** ▶ **Approvals** ▶ **Allocations** and press **Create**.

The screenshot shows the 'Time Off' application interface. The top navigation bar includes 'Time Off', 'My Time Off', 'Overview', 'Approvals', and 'Reporting'. Below the navigation bar, there's a 'Time Off Types / New' section with 'Save' and 'Discard' buttons. A dropdown menu is open, showing 'Time Off' and 'Allocations'. The 'Allocations' section is highlighted with a dashed blue line. The main form is titled 'Allocations - R&D' and contains the following fields:

- Time Off Type:** Paid Time Off
- Allocation Type:** Regular Allocation (selected), Accrual Allocation
- Validity Period:** 05/24/2023 → No Limit
- Duration:** 1.00 Days
- Mode:** By Employee (selected), Employees
- By Employee:** Quang Anh Dao (h4rhvcouxuqk)

At the bottom of the form, there is an 'Add a reason...' field and a 'Confirm' button. The top right of the interface shows the user's name 'Quang Anh Dao (h4rhvcouxuqk)' and a 'Configuration' link.

On the allocation, add the following information:

- *Name of this allocation.*
- *Time Off Type:* Select the time off type to be allocated.
- *Allocation Type:* Select the regular or accrual allocation type depending on your company's policies.
- *Mode:* Define whether this time off allocation is for a specific employee, a department or to the whole company.

On the other hand, employees can also request for time off allocation, following similar steps as HR staff.

➔ See details at:

- *How to create Time off Allocation.*

## Employees request for time off

To create a new time off, navigate to the **Time Off** app, click on **New Time Off** and add details of your time off such as *Time Off Type*, *Start date - End date*, etc. The duration of your time off will be automatically computed based on the dates stated on your time off request.



**New Time Off**

Time Off Type: Sick Time Off

Dates: From 07/08/2023 To 07/08/2023

Duration: 0.00 Days

Description:

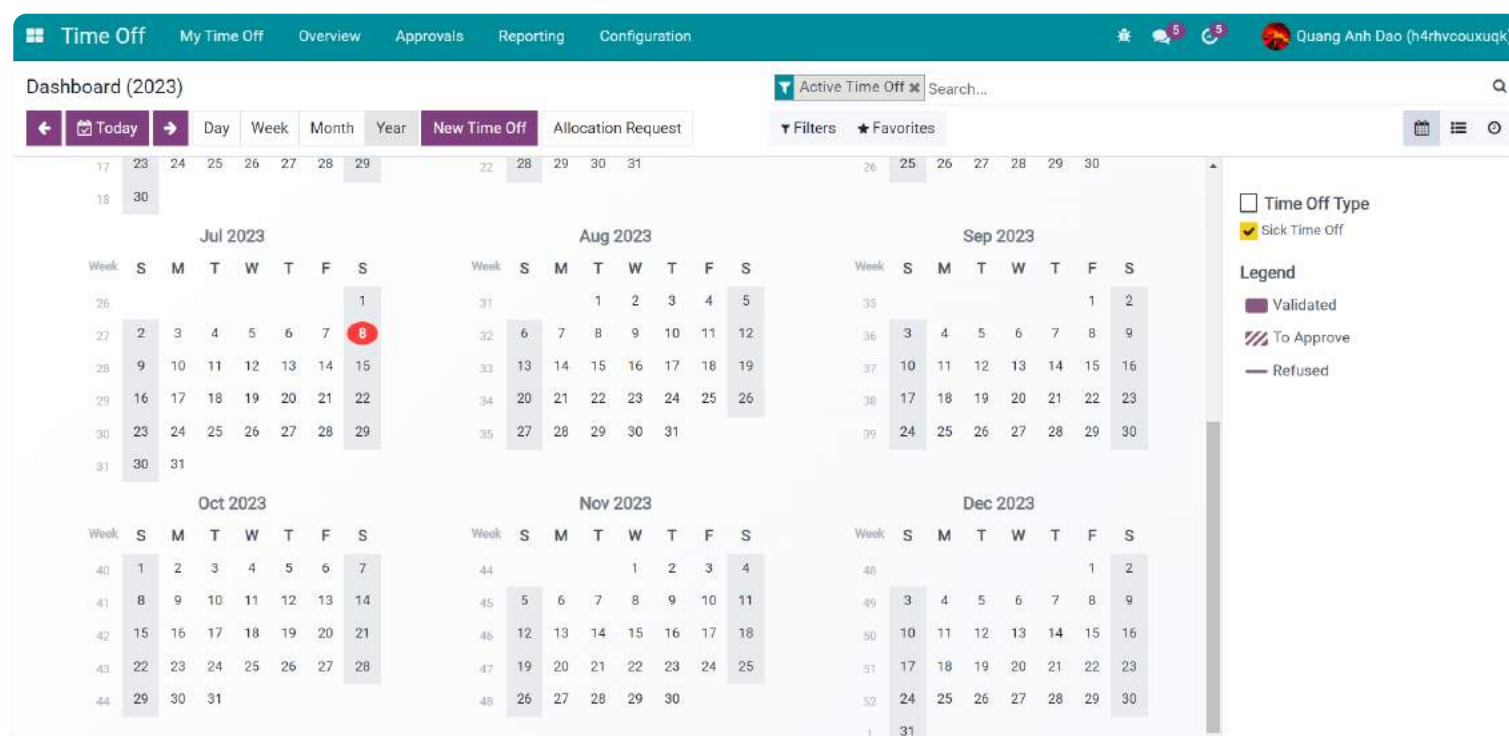
Related Project:

Related Task:

Supporting Document: [Attach File](#)

[Save](#) [Discard](#)

Press **Save** to save the information, and you can view your time off schedule on the **Dashboard**.



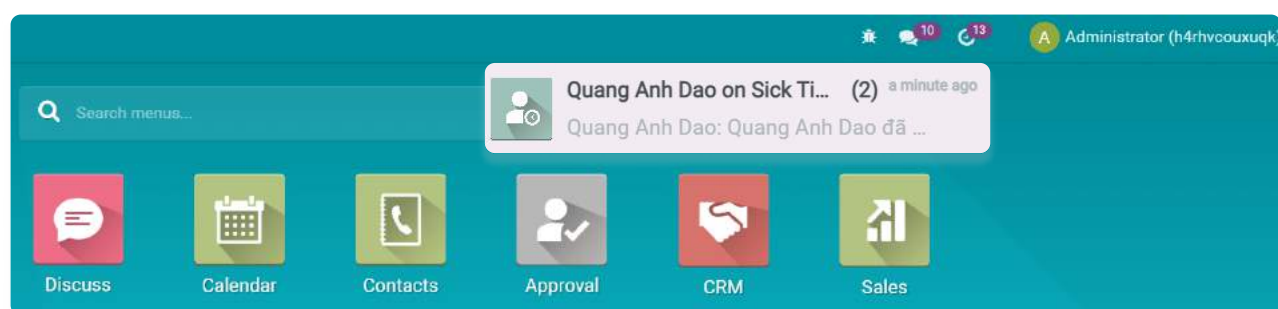
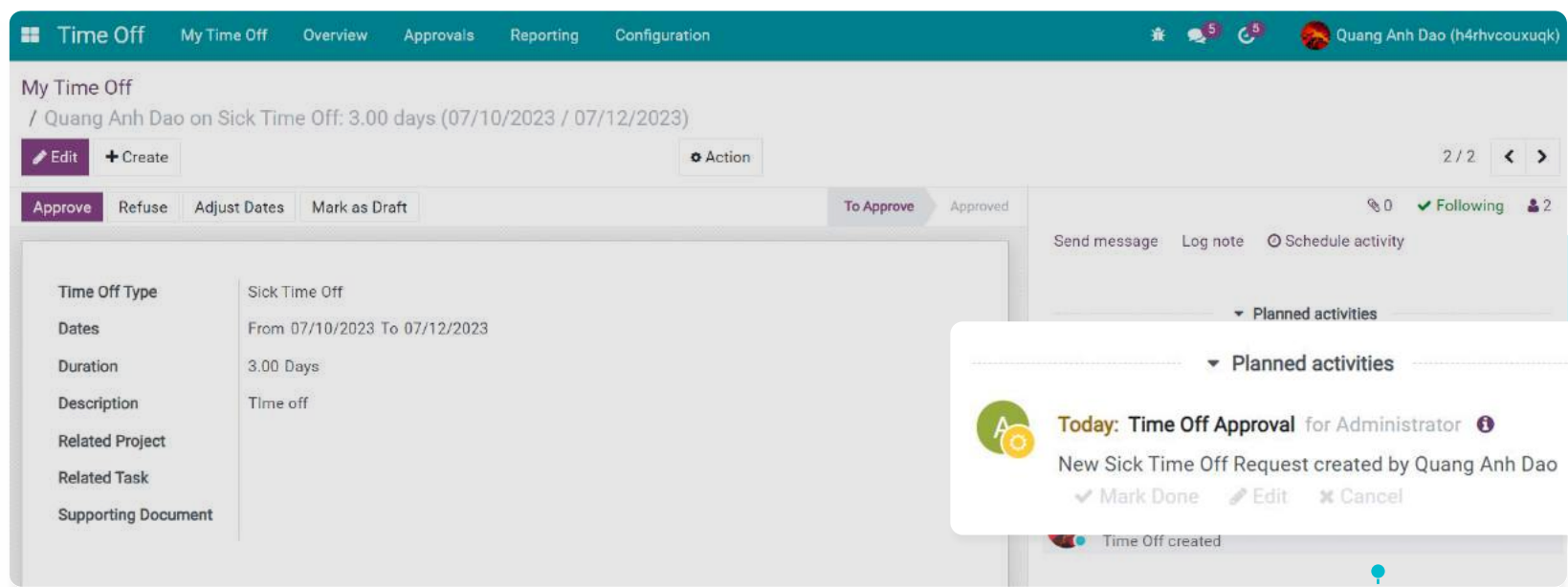
In addition, the HR staff can create time off schedules for each employee.

➔ [See details at:](#)

- [Time off requests created by managers.](#)

### Approve time off for employees

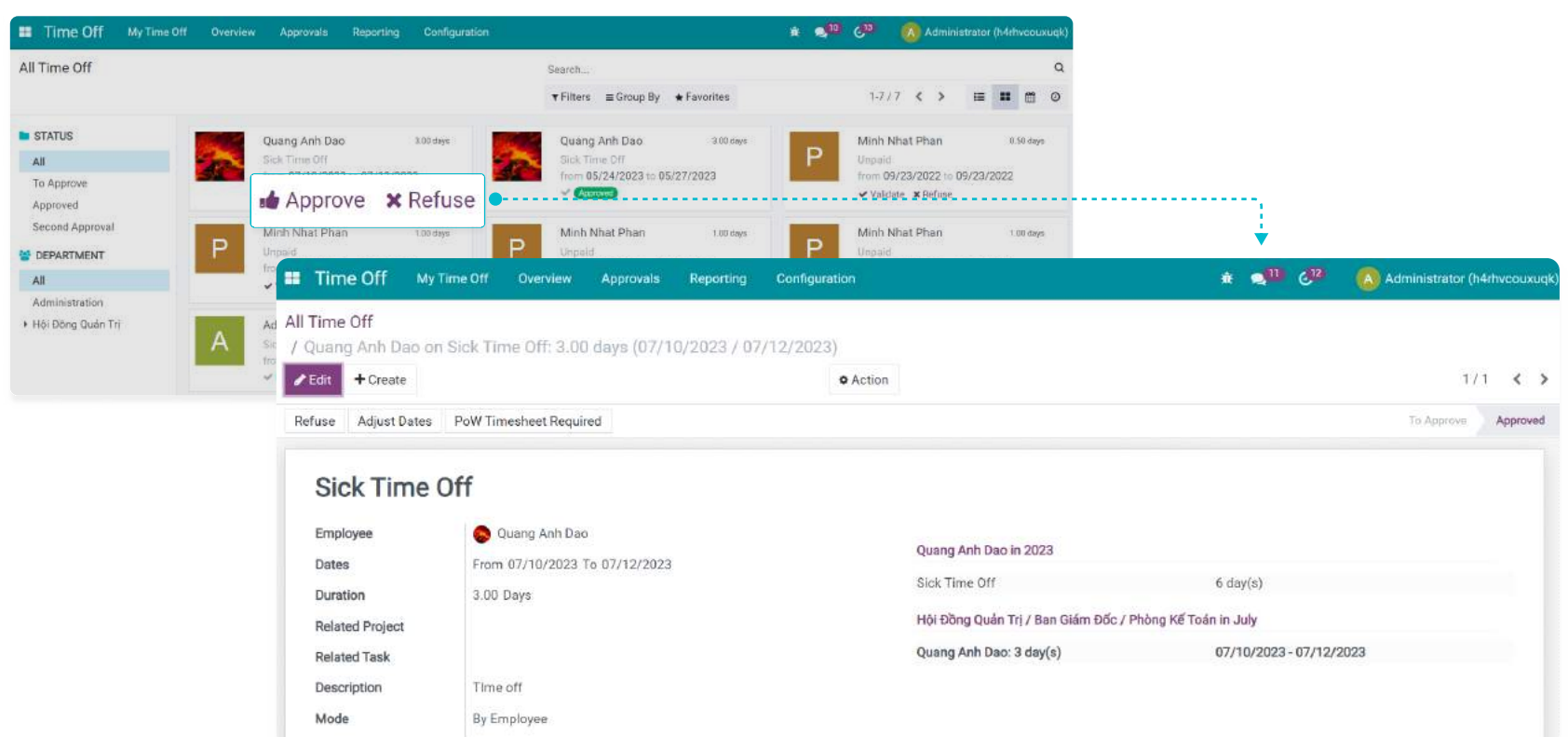
**The employee's direct manager** or **the HR staff** will approve time off for employees, depending on your company policies. Once the time off request is created, a time off approval activity is scheduled for the managers of this employee as a reminder.



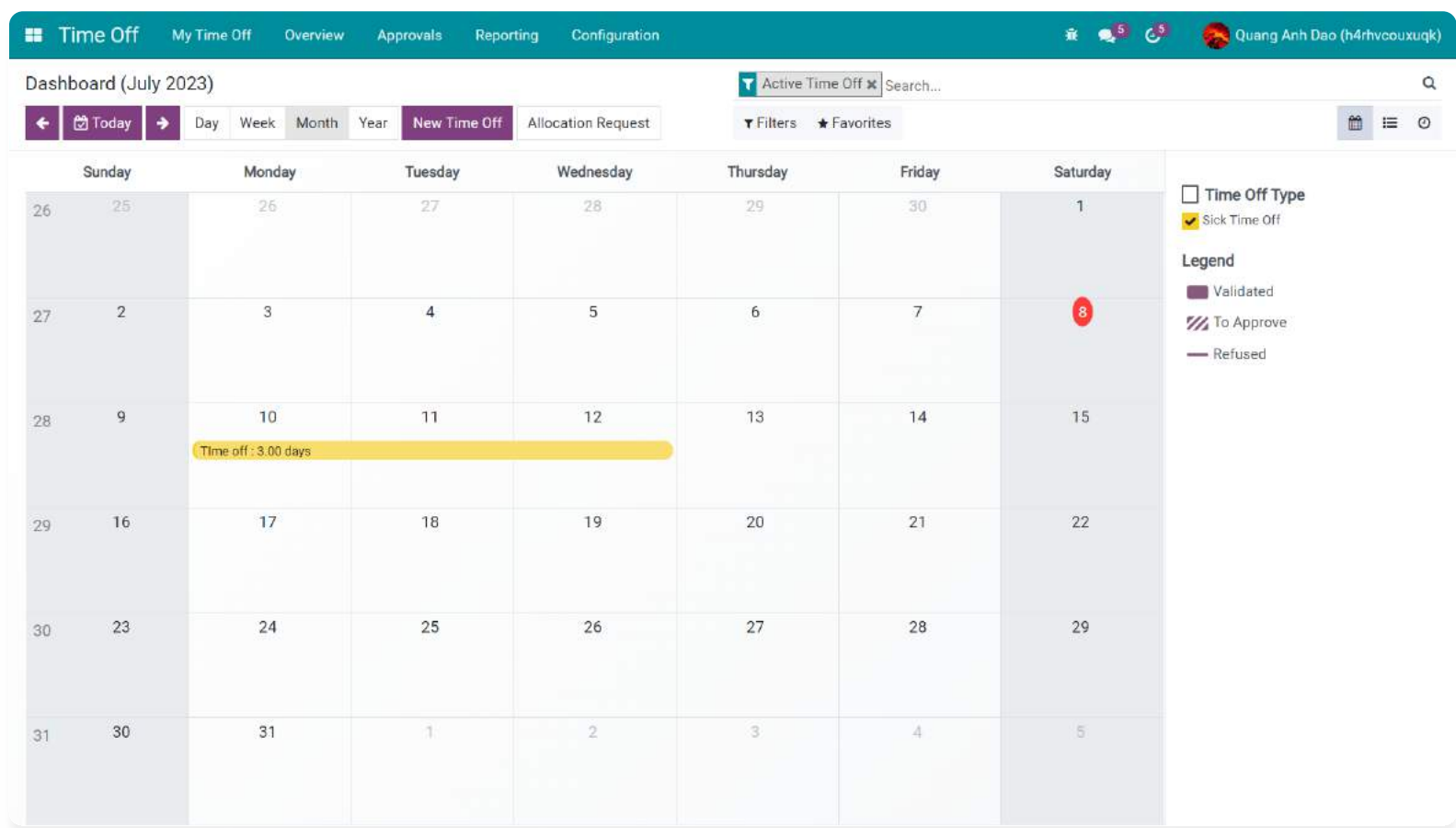
Managers can check the assigned tasks by clicking on the Clock icon and selecting **Time Off**.

From here, you can either **Validate** or **Refuse** the time off allocation request of each employee.

Employees can follow the approval status of their time off request directly. On the other hand, a notification will also be sent to both the request approver and the employee whenever there's an update on the time off request status.



Once approved, the employee's time off will be displayed on the **Calendar** app.

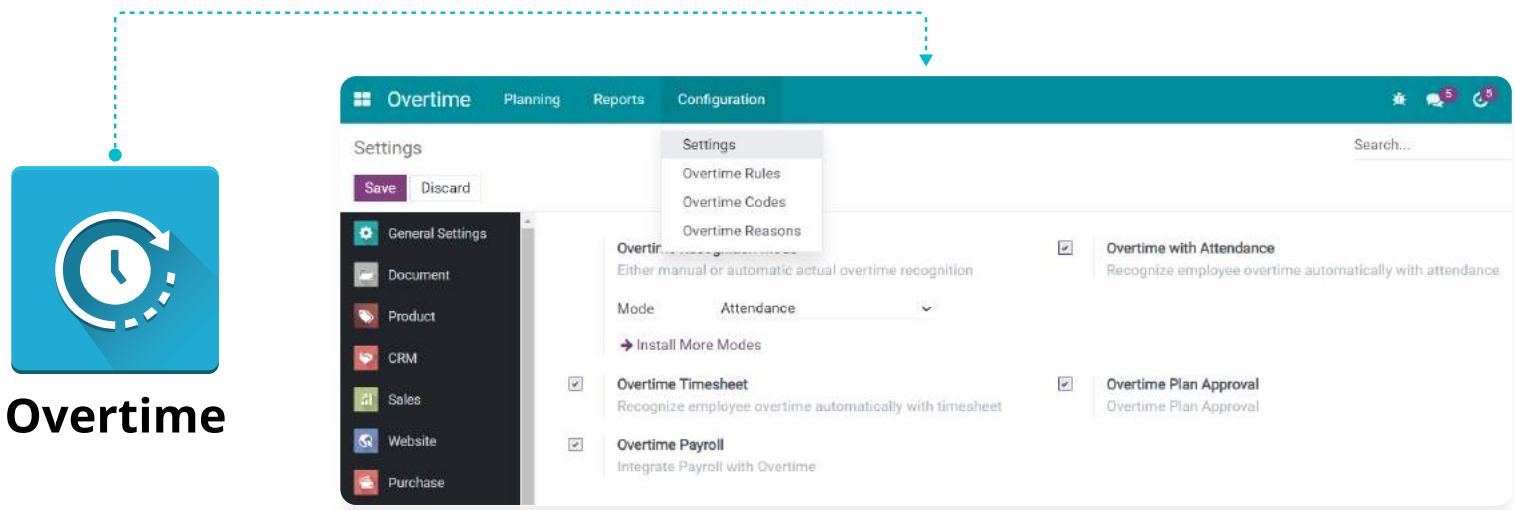


Manage overtime



Setting up overtime recognition mode

First, the **HR staff** needs to set up some general information about overtime following regulations at their business. Navigate to **Overtime** ▶ **Configuration** ▶ **Settings**.

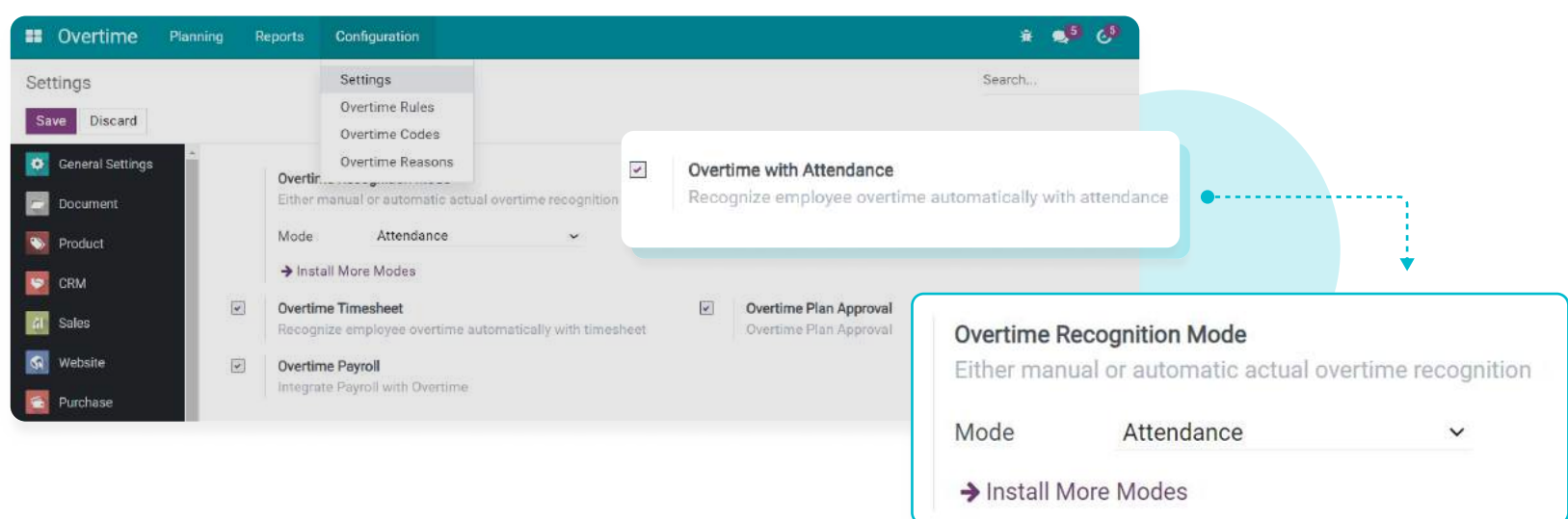


The system supports two overtime recognition modes:

- *By Plan mode*: Overtime hours of employees are recognized by the system based on the planned and approved overtime hours. This is the default mode set up on the system.
- *Attendance mode*: Overtime hours are recorded by the system by matching the planned overtime time (based on registration and approval) with attendance data.

To enable the *Overtime with Attendance* mode, you need to:

*Step 1*: Activate the **Overtime with Attendance** feature, then press **Save**.



*Step 2*: After pressing **Save**, you choose **Attendance** mode on the **Overtime Recognition Mode** field and then press **Save** again to finish.

### *Overtime codes and rules settings*

Viindoo provides some pre-configured **Overtime rules** and **codes** that can be used for the overtime payment calculation in accordance with the local labor laws. **The HR staff** can see available rules with pre-configured payment rates, add or adjust them as needed by navigating to **Overtime ► Configuration ► Overtime Codes** or **Overtime ► Configuration ► Overtime Rules**.

➡ See details at:

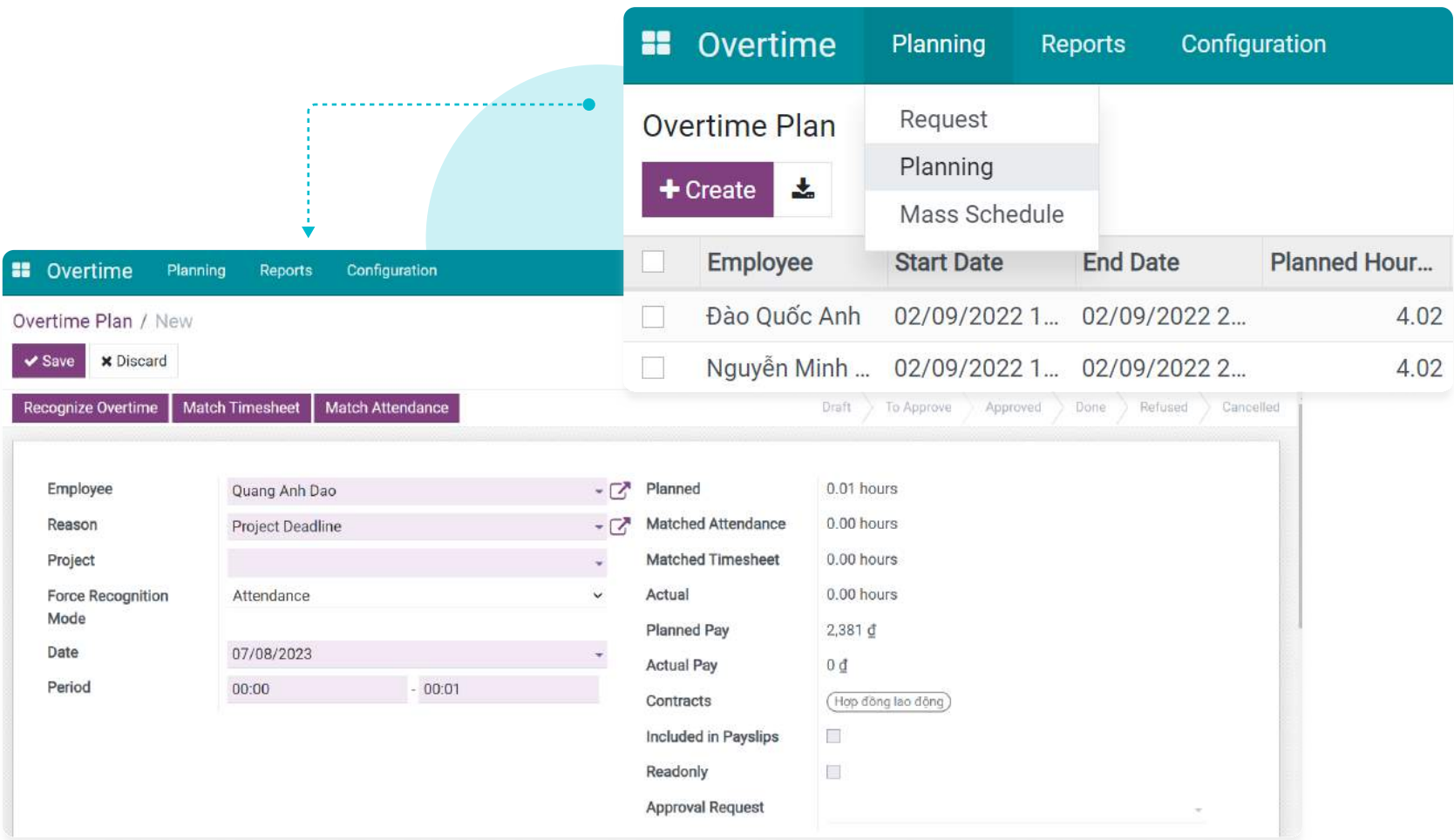
- *Overview and Configuration of Viindoo Overtime.*



*Make overtime plans for employees*

Overtime planning helps businesses to be proactive in coordinating resources for the work to be completed, arranging and assigning work as well as fully preparing conditions to support employees during overtime. Normally, the HR administrative staff or managers of departments with the **Officer** rights in the **Overtime** app will be in charge of planning overtime for employees.

Navigate to **Overtime ▶ Planning ▶ Planning**, then press **Create** to start planning.



Fill in the information fields for the **Overtime Plan**.

Details of the overtime plan and payment rate in accordance with the Labor contract and overtime rules are displayed on the **Plan Lines** tab. If you use *Attendance* recognition mode, once clicked on the **Recognize Overtime** button, the actual overtime hours of the employee are updated in the **Actual Overtime Hours** column. Once you finish adding required information, click the **Save** button for the overtime plan to take effect.

➡ See details at:

- *Make Overtime Plans.*
- *Make Overtime Approval Requests.*
- *Calculating overtime salary.*

Manage attendance data

Integrate biometric attendance devices

To link the biometric device and user data in your device with the Viindoo system.

➔ See details at:

- Biometric attendance device integration.
- Link Attendance device users with employees in Viindoo system.

Track and manage valid attendance data

Based on the daily attendance data and the employee's working hours, the system will automatically determine the valid input/output data and calculate the valid working hours, early leave or late arrival hours, etc. which will then be used for the salary calculation and HR management.

To view the attendance data, navigate to **Attendance** ▶ **Attendance**.

Attendances

Check In / Check OutKiosk ModeAttendancesAttendance MachinesReportingConfiguration

Đào Quang Anh

Attendances

Search...

+ Create

FiltersGroup ByFavorites

1-80 / 5925

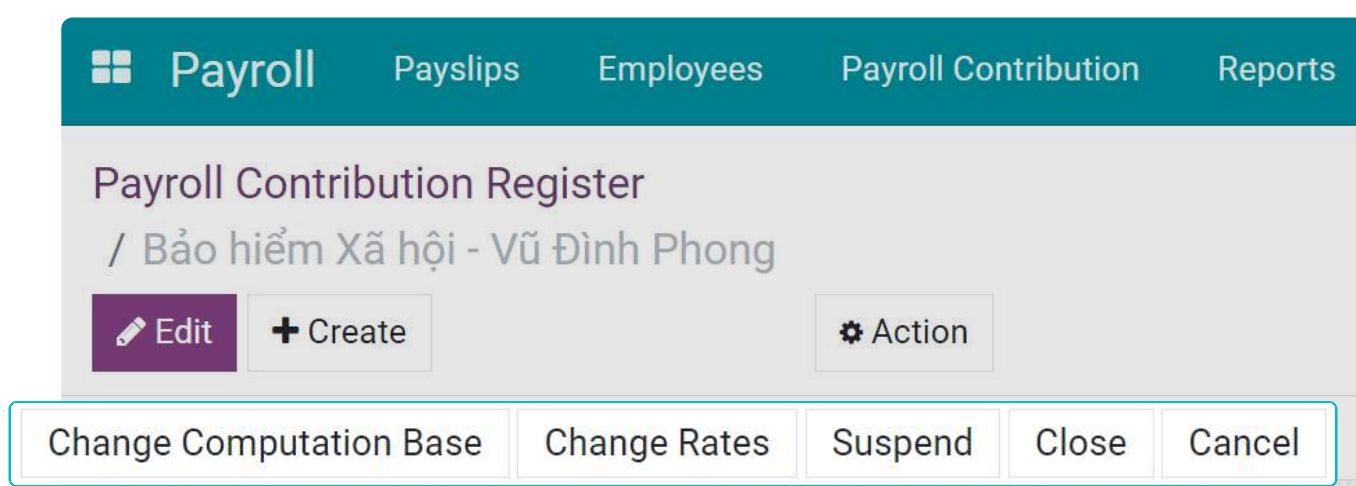
	Employee	Check In	Late Coming Hours...	Check Out	Attendance Activity	Early Leave Hours	Valid Attendance Hours...	Work Hours...
<input type="checkbox"/>	[04153364] Nguyen Dai ...	06/06/2023 08:27:36	00:00		Normal Attendance	00:00	00:00	00:00
<input type="checkbox"/>	[04168042] Dao Thi Phu...	06/06/2023 08:06:44	00:00		Normal Attendance	00:00	00:00	00:00
<input type="checkbox"/>	[04154692] Nguyen Thi T...	06/06/2023 08:02:41	00:00		Normal Attendance	00:00	00:00	00:00
<input type="checkbox"/>	[04138583] Doan Thuy D...	06/06/2023 08:00:16	00:00		Normal Attendance	00:00	00:00	00:00
<input type="checkbox"/>	[04198581] Nguyen Ha T...	06/06/2023 07:59:56	00:00		Normal Attendance	00:00	00:00	00:00
<input type="checkbox"/>	[04107810] To Le Quyen	06/06/2023 07:58:46	00:00		Normal Attendance	00:00	00:00	00:00
<input type="checkbox"/>	[04168405] Bui Bich Phu...	06/06/2023 07:58:36	00:00		Normal Attendance	00:00	00:00	00:00
<input type="checkbox"/>	[04139036] Luong Viet Li...	06/06/2023 07:58:34	00:00		Normal Attendance	00:00	00:00	00:00
<input type="checkbox"/>	[04158186] Pham Quang...	06/06/2023 07:57:20	00:00		Normal Attendance	00:00	00:00	00:00
<input type="checkbox"/>	[04140183] Le Thi Kieu Li...	06/06/2023 07:56:50	00:00		Normal Attendance	00:00	00:00	00:00
<input type="checkbox"/>	[04152452] Nguyen Viet ...	06/06/2023 07:56:25	00:00		Normal Attendance	00:00	00:00	00:00
<input type="checkbox"/>	[04132392] Nguyen Thi T...	06/06/2023 07:54:46	00:00		Normal Attendance	00:00	00:00	00:00
<input type="checkbox"/>	[04115264] Dinh Thi Min...	06/06/2023 07:53:46	00:00		Normal Attendance	00:00	00:00	00:00
<input type="checkbox"/>	[04142645] Nguyen Thi ...	06/06/2023 07:53:43	00:00		Normal Attendance	00:00	00:00	00:00
<input type="checkbox"/>	[04191046] Nguyen Van ...	06/06/2023 07:53:38	00:00		Normal Attendance	00:00	00:00	00:00
<input type="checkbox"/>	[04191201] Nguyen Thi B...	06/06/2023 07:53:33	00:00		Normal Attendance	00:00	00:00	00:00
<input type="checkbox"/>	[04165533] Do Trung Duc	06/06/2023 07:53:30	00:00		Normal Attendance	00:00	00:00	00:00
			01:17			01:41	317:02	

From here, you can see the employee's valid **Check-in** and **Check-out** hours. In addition, you can also see the computed **Late Coming Hours**, **Early Leave Hours**, and **Valid Attendance Hours** based on each employee's working hours.

## Manage salary contribution rates

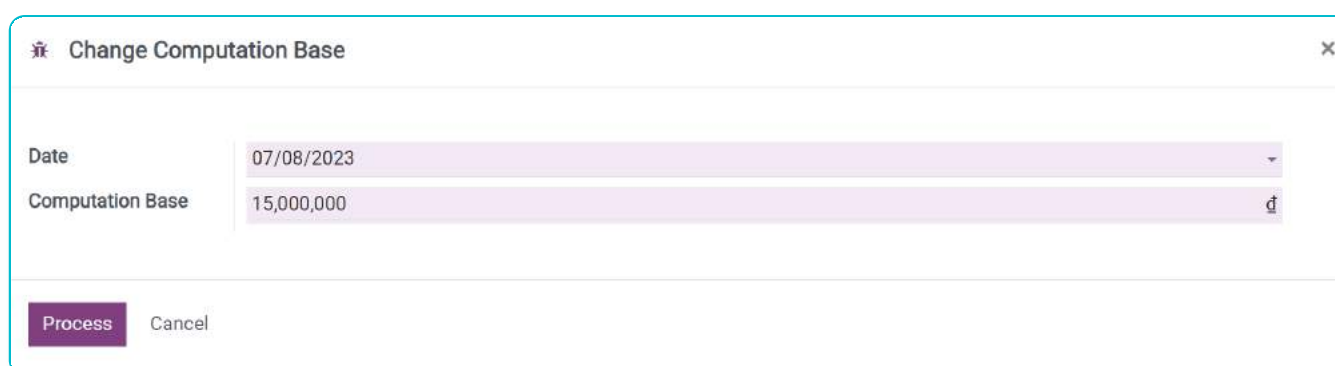
Sometimes, salary contributions such as insurance, union funds might be adjusted due to changes in labor law or company's policies and the **HR staff** wants to keep track of the historical changes. In order to do so effectively, do not press edit or cancel the contribution, take advantage of the suggested action buttons available on the payroll contribution registration form instead:

- *Change Computation Base;*
- *Change Rates;*
- *Suspend;*
- *Close;*
- *Cancel.*



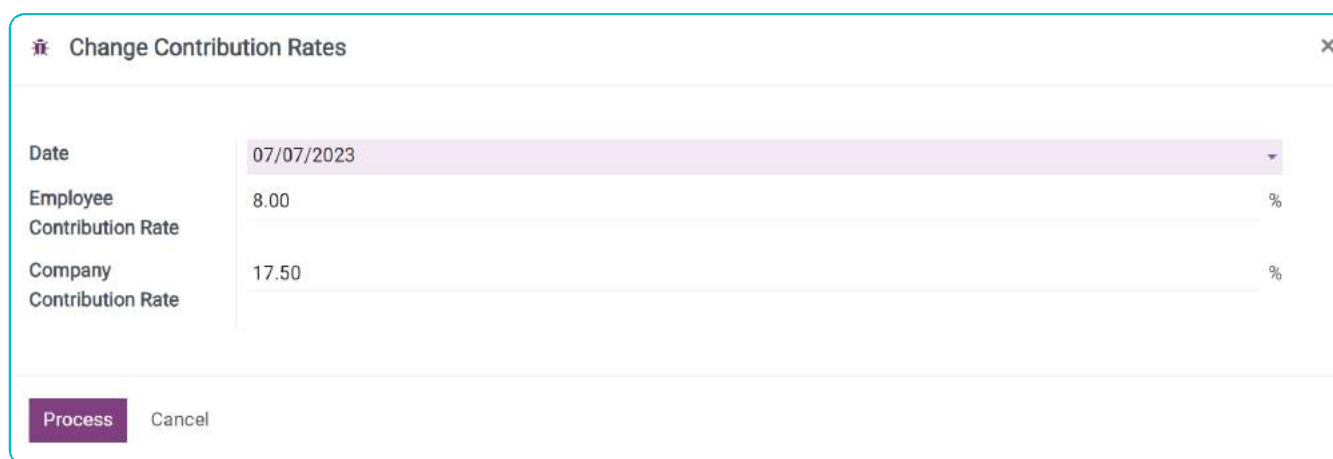
### Adjust the contribution computation base salary

You can change the computation base for each type of contribution by clicking the **Change Computation Base** button, and entering the *Date* and *Computation Base* information. Then click **Process** to finish.



### Change the contribution rate

Similarly, you can also change the contribution rate of an employee or company by pressing the **Change Rates** button. Then click **Process** to finish.



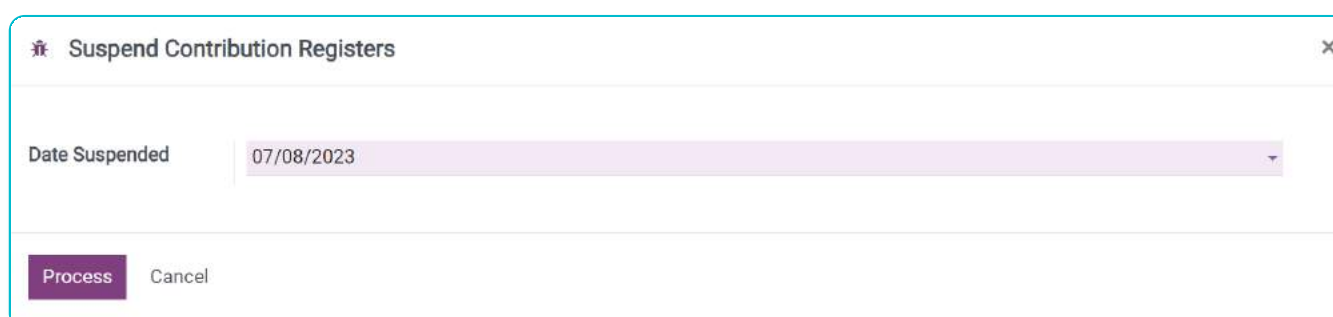
**Change Contribution Rates**

Date	07/07/2023	
Employee Contribution Rate	8.00	%
Company Contribution Rate	17.50	%

**Process** Cancel

### *Suspend and resume the payroll contributions*

Press the **Suspend** button and enter the Date to stop the contribution. Then click **Process** to finish.

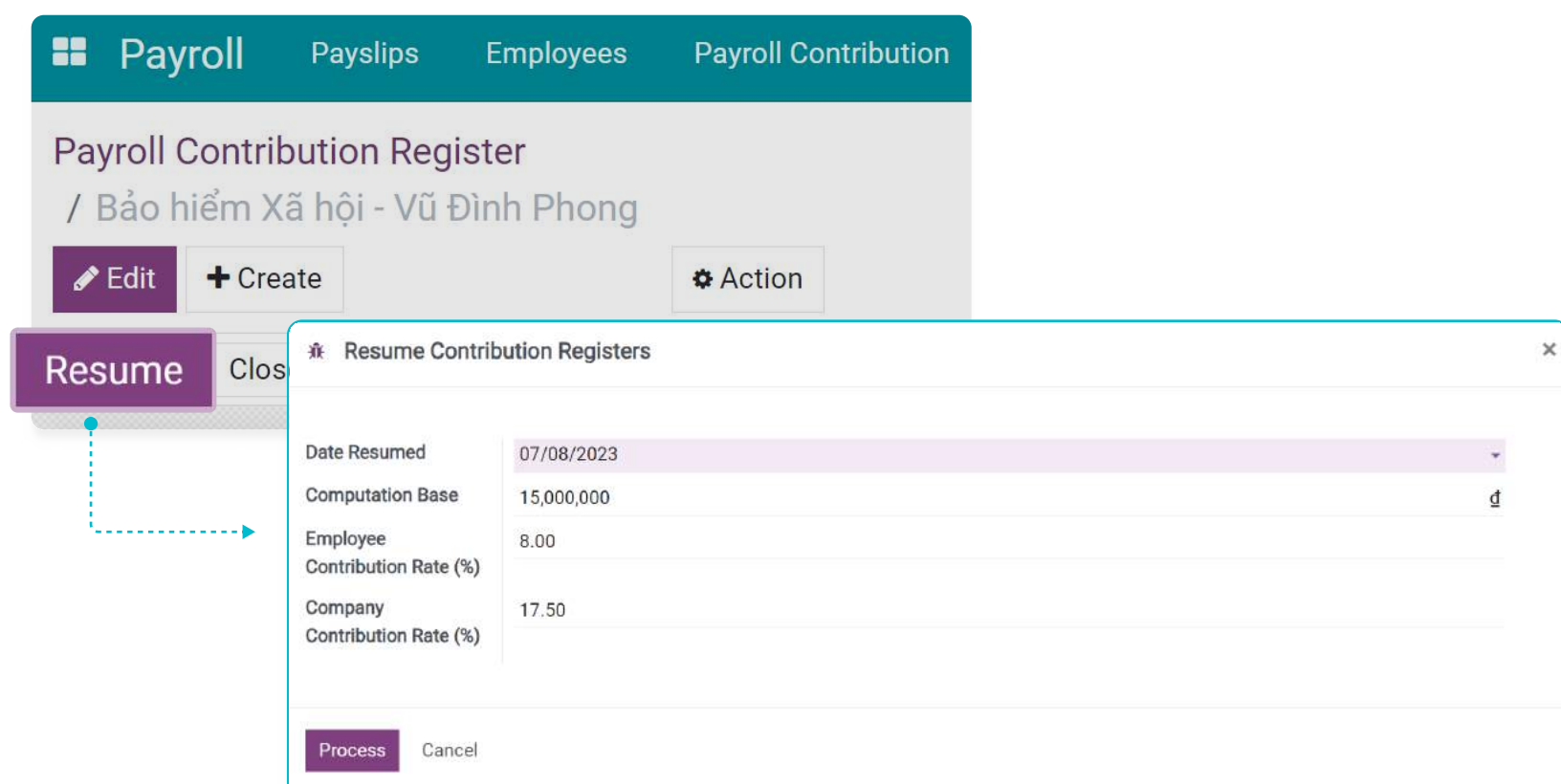


**Suspend Contribution Registers**

Date Suspended	07/08/2023
----------------	------------

**Process** Cancel

Starting from the selected suspend date, this contribution will no longer be effective. In case you want to open this contribution again, press the **Resume** button.



**Payroll** Payslips Employees Payroll Contribution

**Payroll Contribution Register**  
/ Bảo hiểm Xã hội - Vũ Đình Phong

**Edit** **+ Create** **Action**

**Resume** **Close**

**Resume Contribution Registers**

Date Resumed	07/08/2023
Computation Base	15,000,000
Employee Contribution Rate (%)	8.00
Company Contribution Rate (%)	17.50

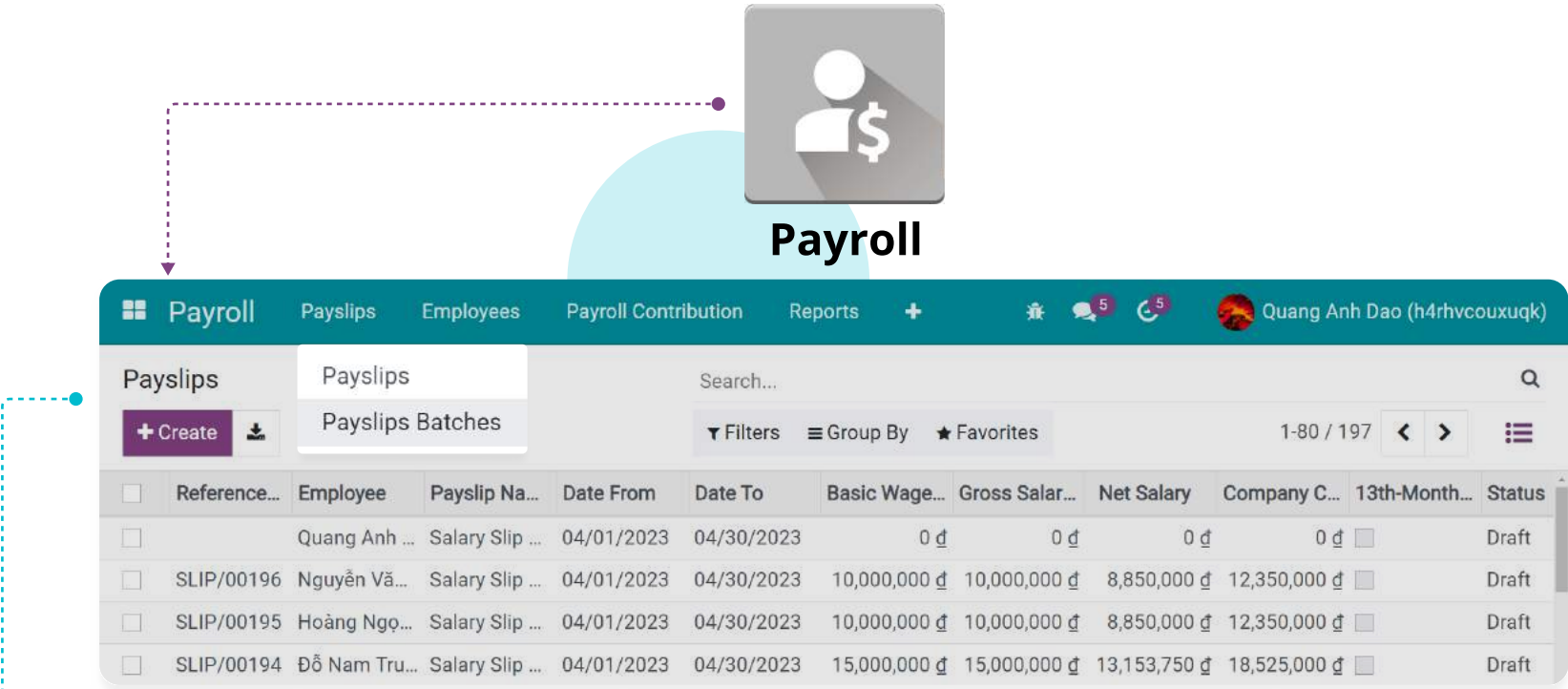
**Process** Cancel

Fill in the information to register the employee and click **Process** to complete it.



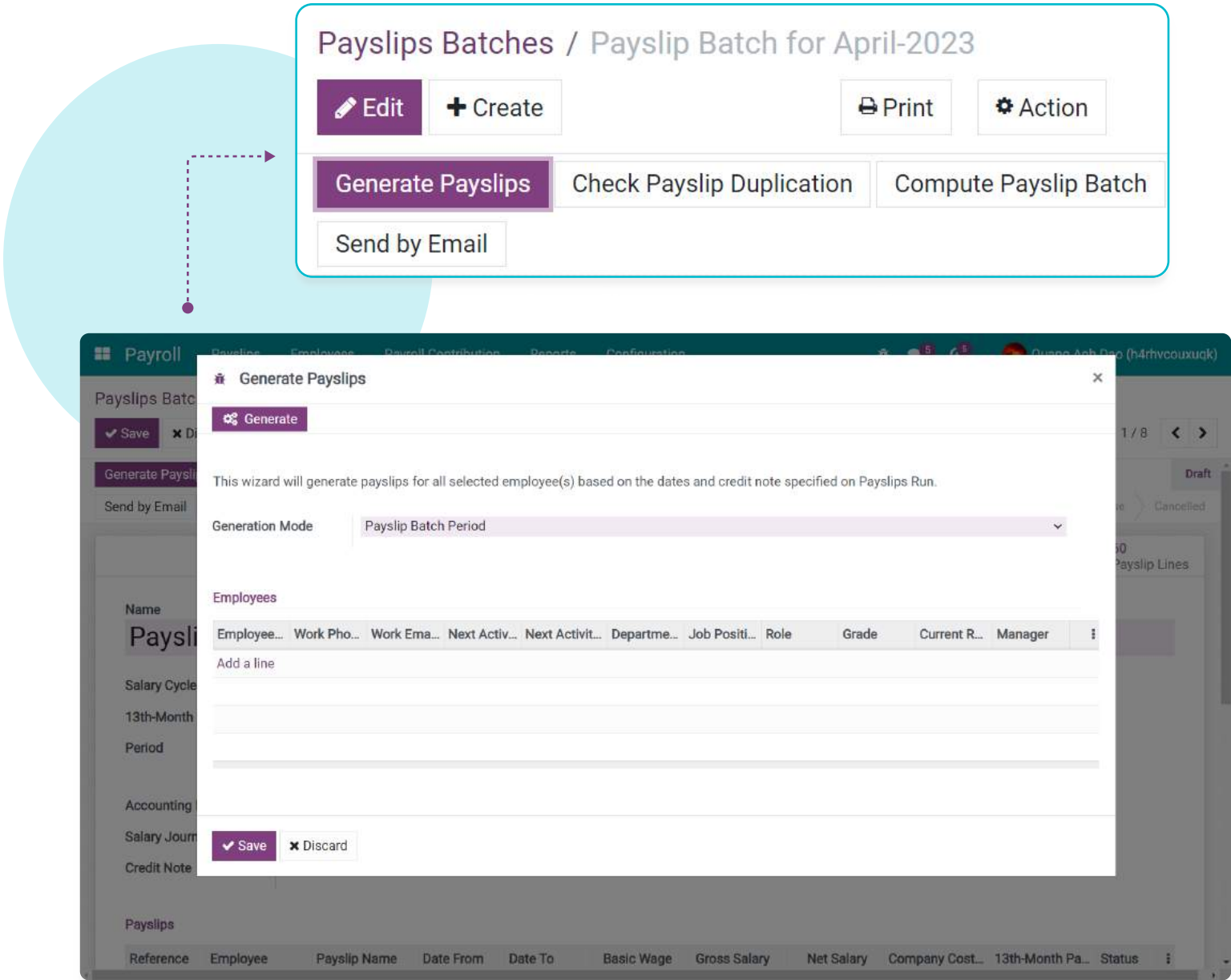
Generate payroll for the whole company

To generate a payroll, navigate to **Payroll** ▶ **Payslips** ▶ **Payslips Batches** ▶ **Create**.

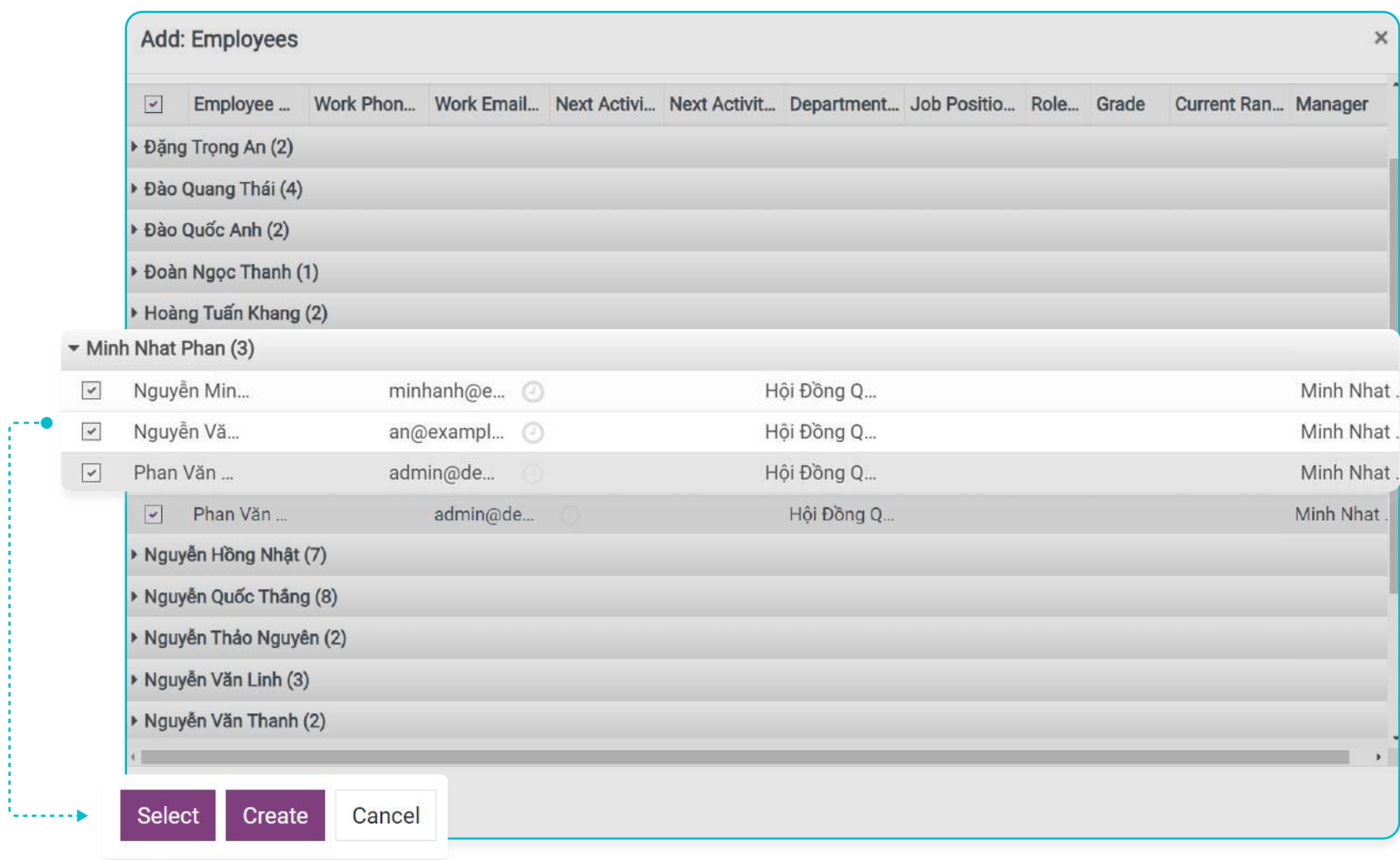


In the detailed interface of Payslips Batch, enter general information such as **Name**, **Salary Cycle**, **Period**, etc.

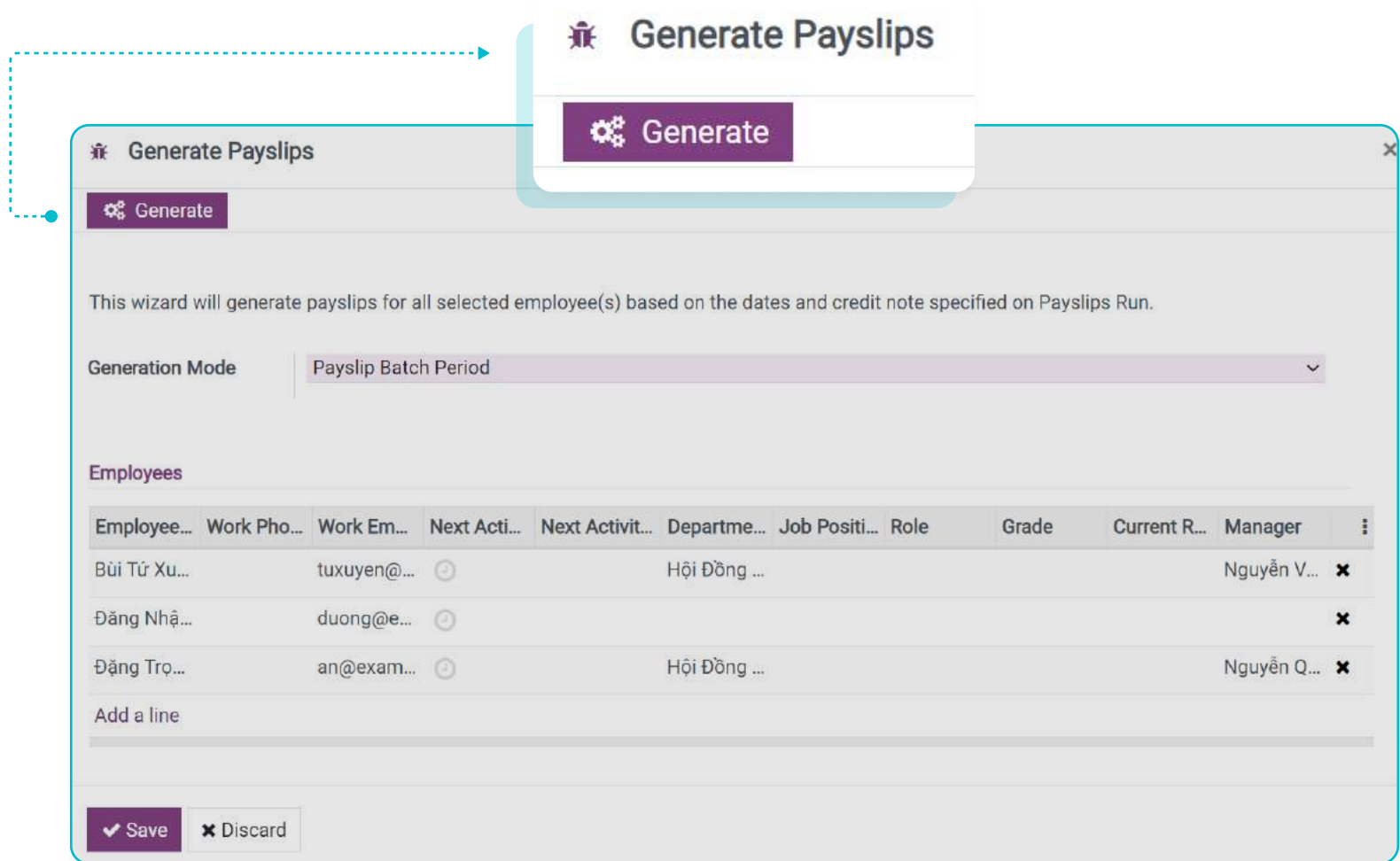
Press the **Generate Payslips** button to create payslips in bulk.



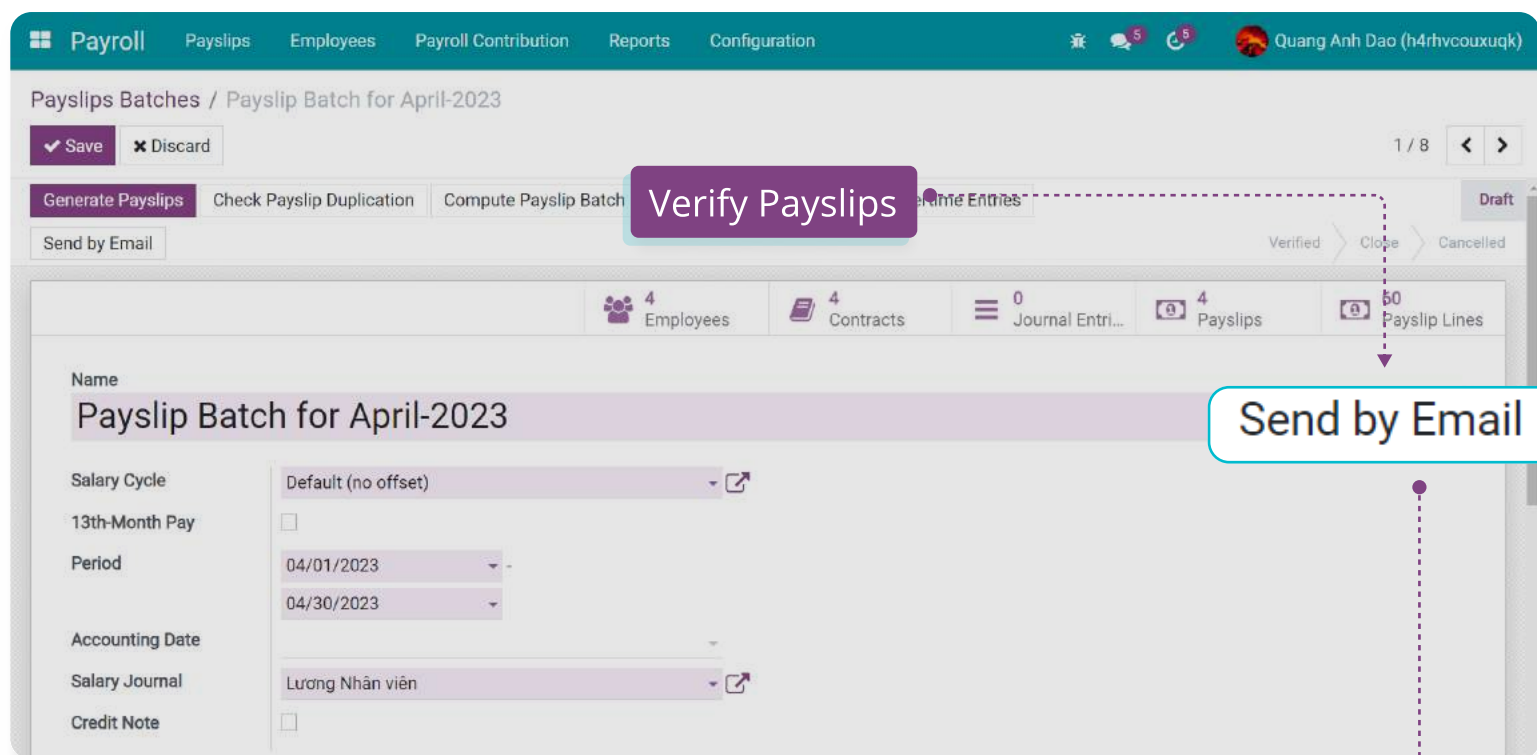
Click **Add a line** to select the employees for whom you need to create payslips. In this view, you can use [the grouping and filter feature](#) to search for certain employees, click to select all, then press **Select**.



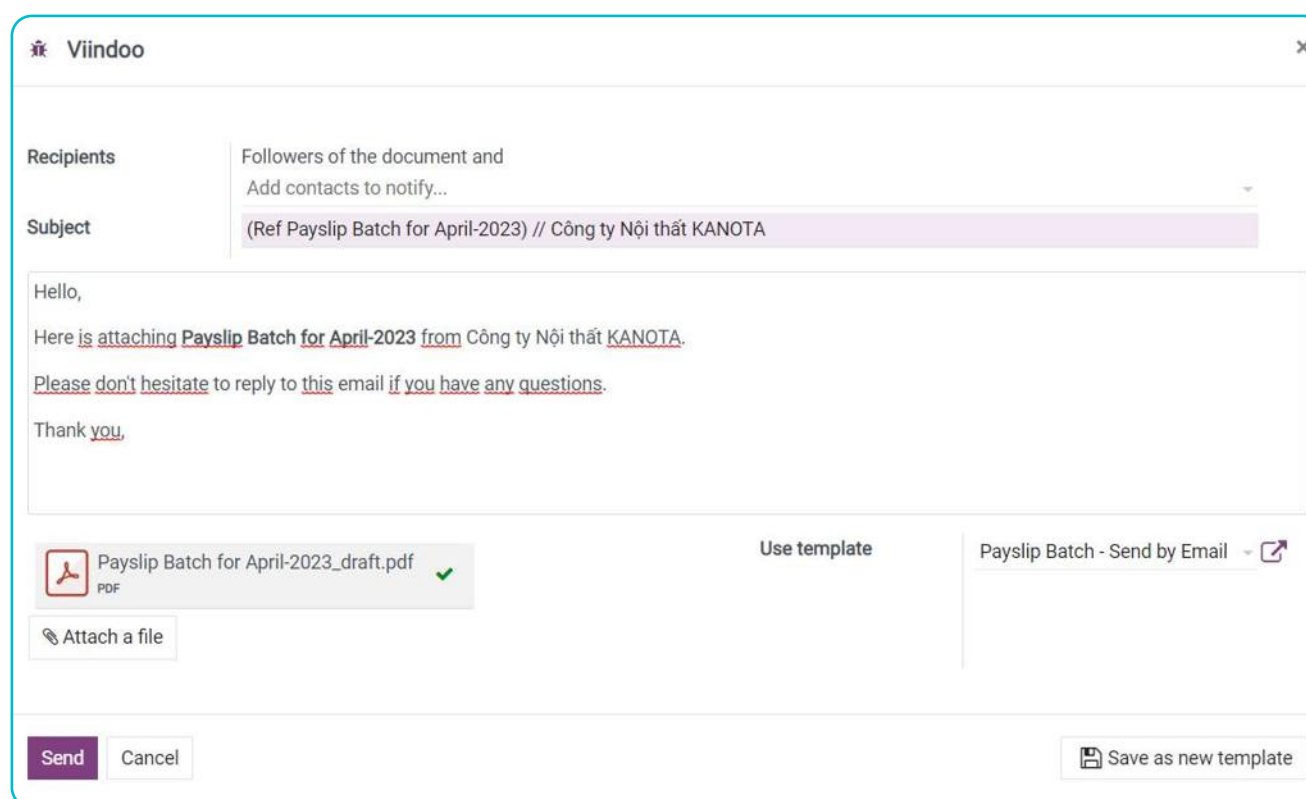
Click **Generate** on the payslip generation window to generate a payslip batch.



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:



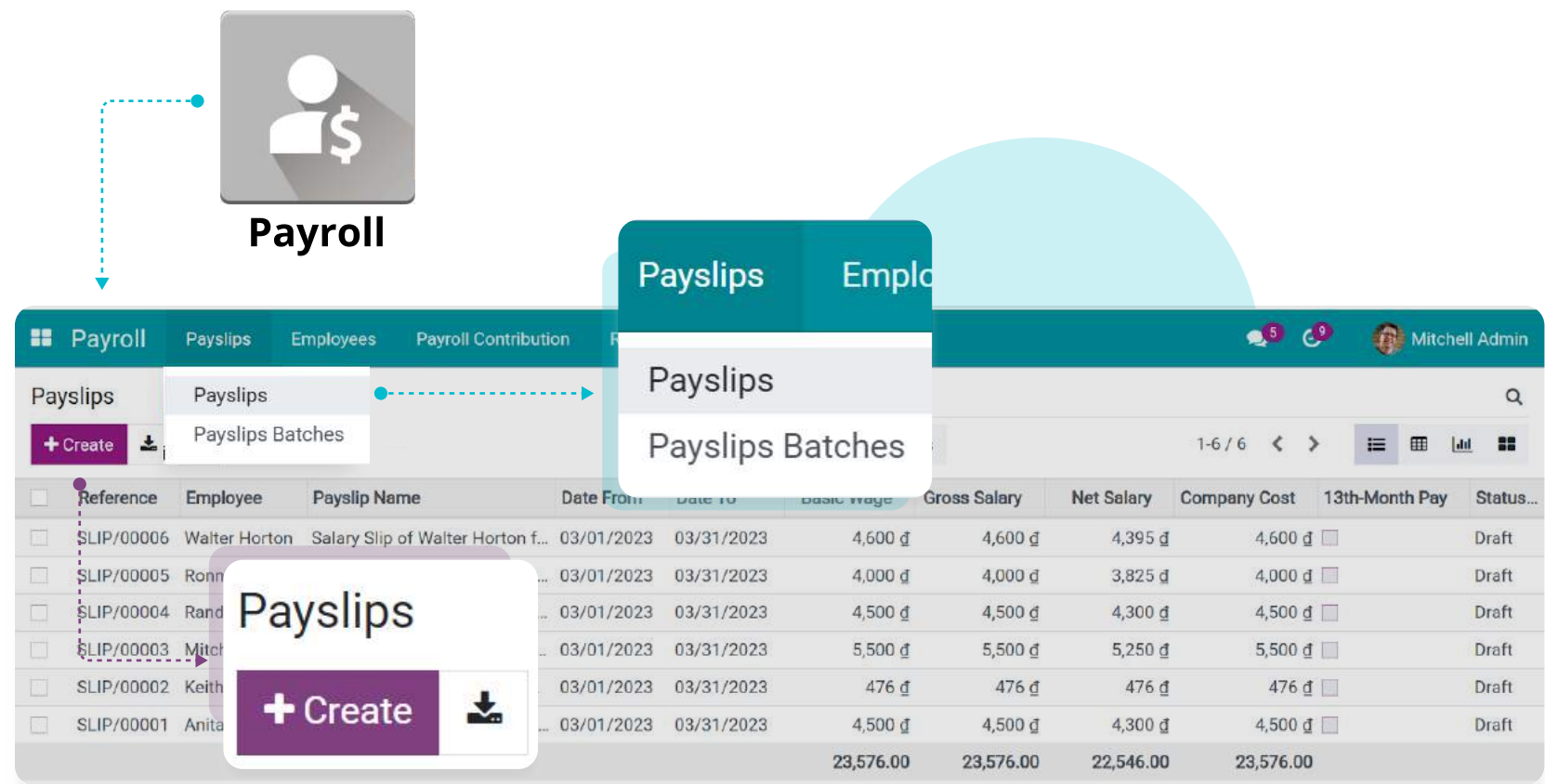
➡ See details at:

- [Instructions to create Payslips Batches on Viindoo software.](#)

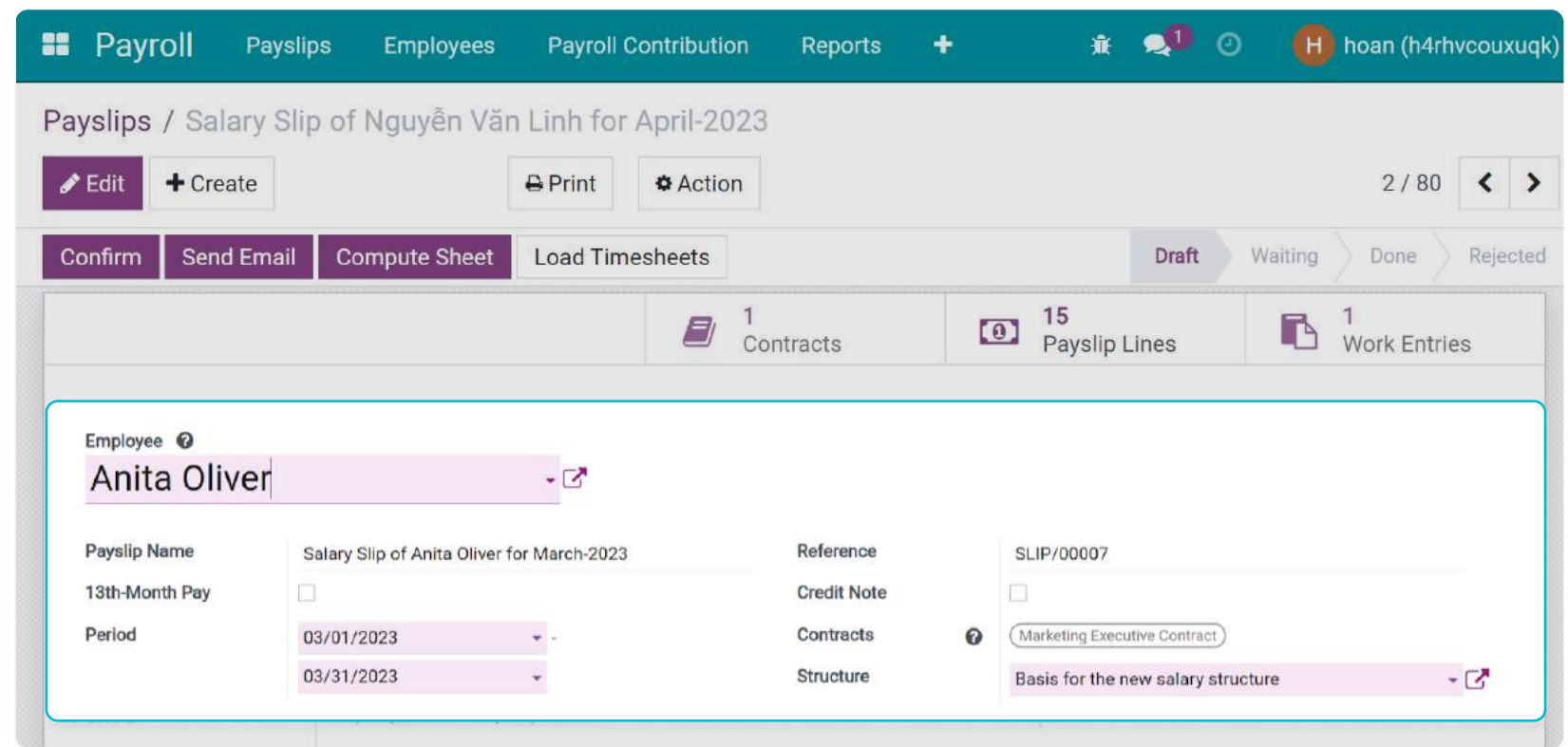
## Create Payslips for each employee

### Create payslip

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



Enter the general information for the payslip:



- *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 entering all the above information, click **Compute Sheet** so that the system automatically retrieves data from other related modules to fill in the payslip.

Payroll

Payslips

Employees

Payroll Contribution

Reports

+

1

H

hoan (h4rhvcouxuqk)

Payslips / Salary Slip of Nguyễn Văn Linh for April-2023

Edit

Create

Print

Action

2 / 80

<

>

Confirm

Send Email

Compute Sheet

Draft

Waiting

Done

Rejected

1

Contracts

15

Payslip Lines

1

Work Entries

Nguyễn Văn Linh

Payslip Name

Salary Slip of Nguyễn Văn Linh for April-2023

Salary Cycle

Default (no offset)

13th-Month Pay

☐

Period

04/01/2023 - 04/30/2023

Reference

SLIP/00196

Credit Note

☐

Contracts

Hợp đồng lao động

Structure

Cơ sở cho cấu trúc lương mới

Check the information on the payslip

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

Worked Days & Contributions & Inputs

Payslips / Salary Slip of Nguyễn Văn Linh for April-2023

Edit

Create

Print

Action

Confirm

Send Email

Compute Sheet

Load Timesheets

Worked Days & Contributions & Inputs

Salary Computation

Details By Salary Rule Category

Personal Income Tax Details

Accounting Information

Working Calendar Info

Calendar Working Hours

160.00 hours

Calendar Working Days

20.00 days

Worked Hours

160.00 hours

Worked Days

20.00 days

Duty Working Hours

160.00 hours

Duty Working Days

20.00 days

Leave Summary

Total Leave Hours

0.00 hours

Total Leave Days

0.00 days

Unpaid Leave Hours

0.00 hours

Unpaid Leave Days

0.00 days

PoW Timesheet Summary

Required

0.00 hours

Recorded

0.00 hours

Missed

0.00 hours

Required

0.00 days

Recorded

0.00 days

Missed

0.00 days

Viindoo Ebook Quick Start Guide For Medium Business

161

Salary Computation

Salary Computation

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

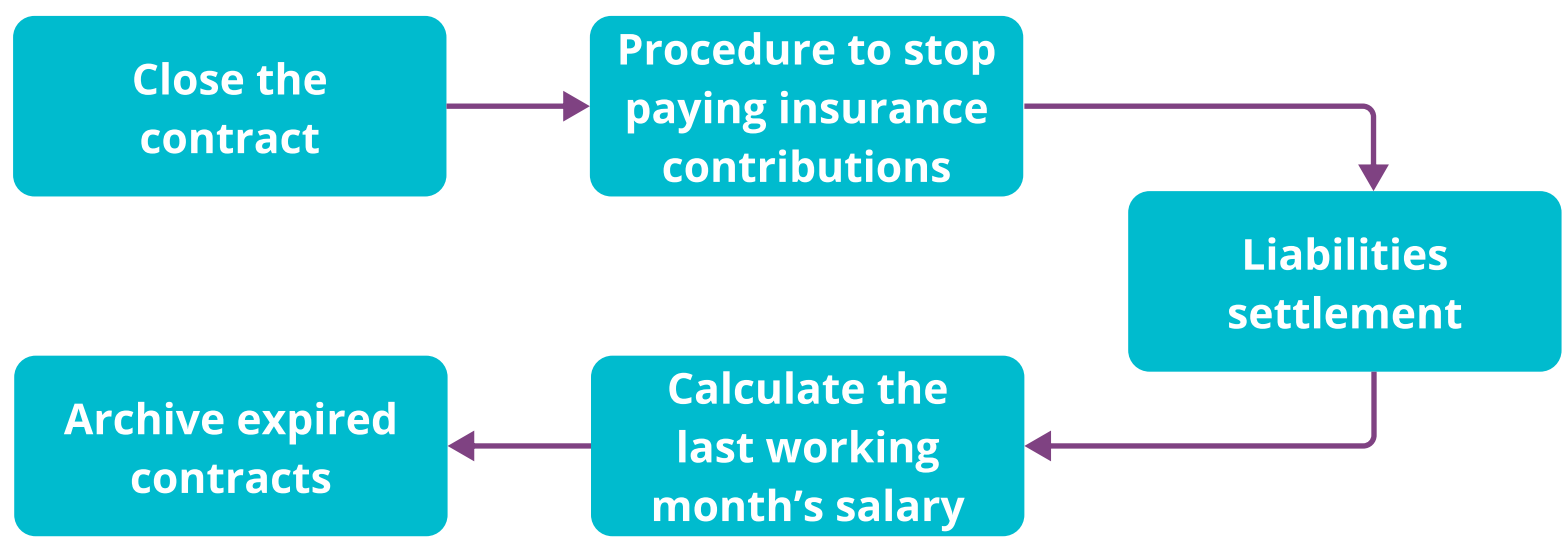
Personal Income Tax Detail

Personal Income Tax Details

Worked Days & Contributions & InputsSalary ComputationDetails By Salary Rule CategoryPersonal Income Tax DetailsAccounting Information					
Personal Income Tax Policy Tax Rule	Progressive Tax Table		Gross Salary	89,530,435 đ	
			Personal Deduction	11,000,000 đ	
			Dependent Deduction	0 đ	
	Progressive Tax Table for Vietnam		Personal Income Tax Base	75,905,435 đ	
Tax computation breaks					
Tax Policy	Taxed Income	Tax Escalation	Rate (%)	Tax Computation Base	Tax Amount
Progressive Tax Table	75,905,435 đ	Greater than 52,000,000 đ	30.00	23,905,435 đ	7,171,631 đ
Progressive Tax Table	52,000,000 đ	Greater than 32,000,000 đ	25.00	20,000,000 đ	5,000,000 đ
Progressive Tax Table	32,000,000 đ	Greater than 18,000,000 đ	20.00	14,000,000 đ	2,800,000 đ
Progressive Tax Table	18,000,000 đ	Greater than 10,000,000 đ	15.00	8,000,000 đ	1,200,000 đ
Progressive Tax Table	10,000,000 đ	Greater than 5,000,000 đ	10.00	5,000,000 đ	500,000 đ
Progressive Tax Table	5,000,000 đ	Greater than 0 đ	5.00	5,000,000 đ	250,000 đ
				75,905,435.00	16,921,631.00

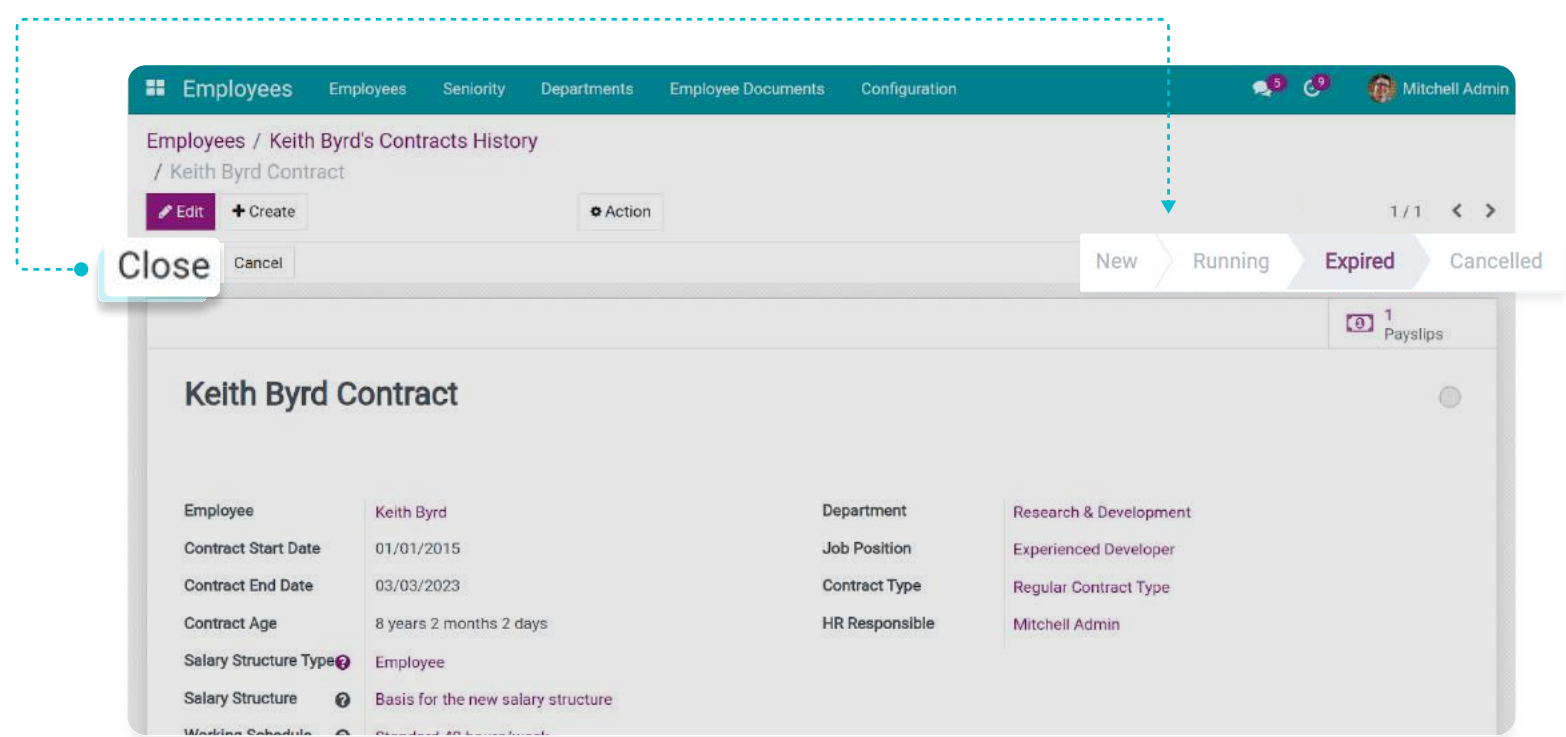
- ➔ See details at:
- *How to create Payslip for each employee in Viindoo.*

HANDLING LEAVING EMPLOYEE FILES



Close the contract

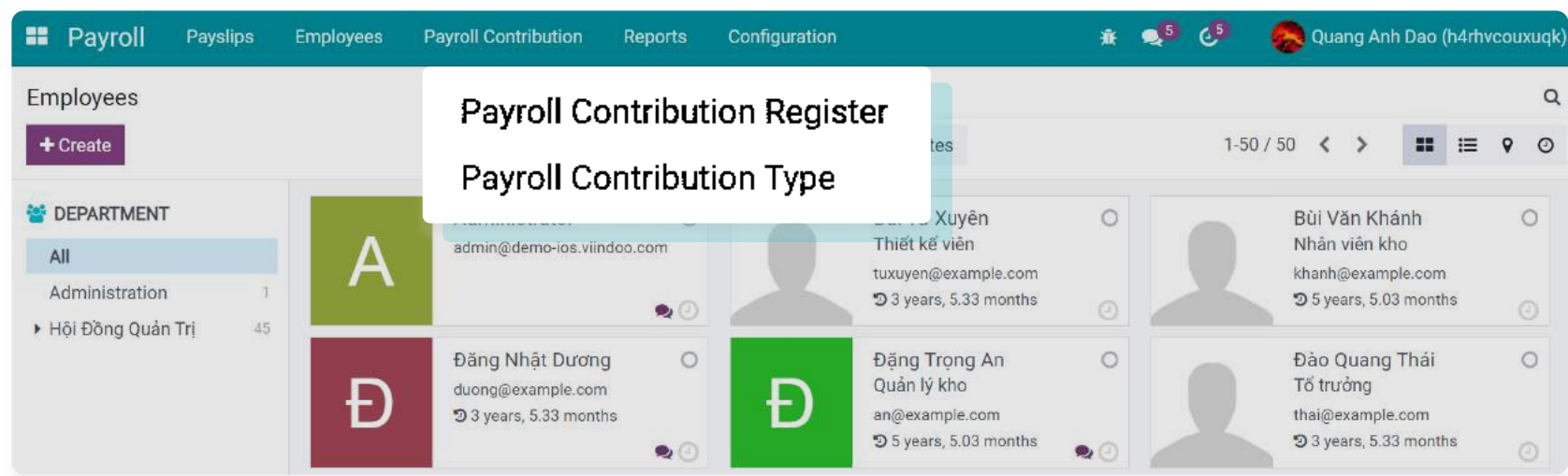
Click the **Close** button on the employee's contract to set it to **Expired**.



Besides, when the current date is the contract's end date, its status will also be changed to **Expired** automatically.

Procedure to stop paying insurance contributions

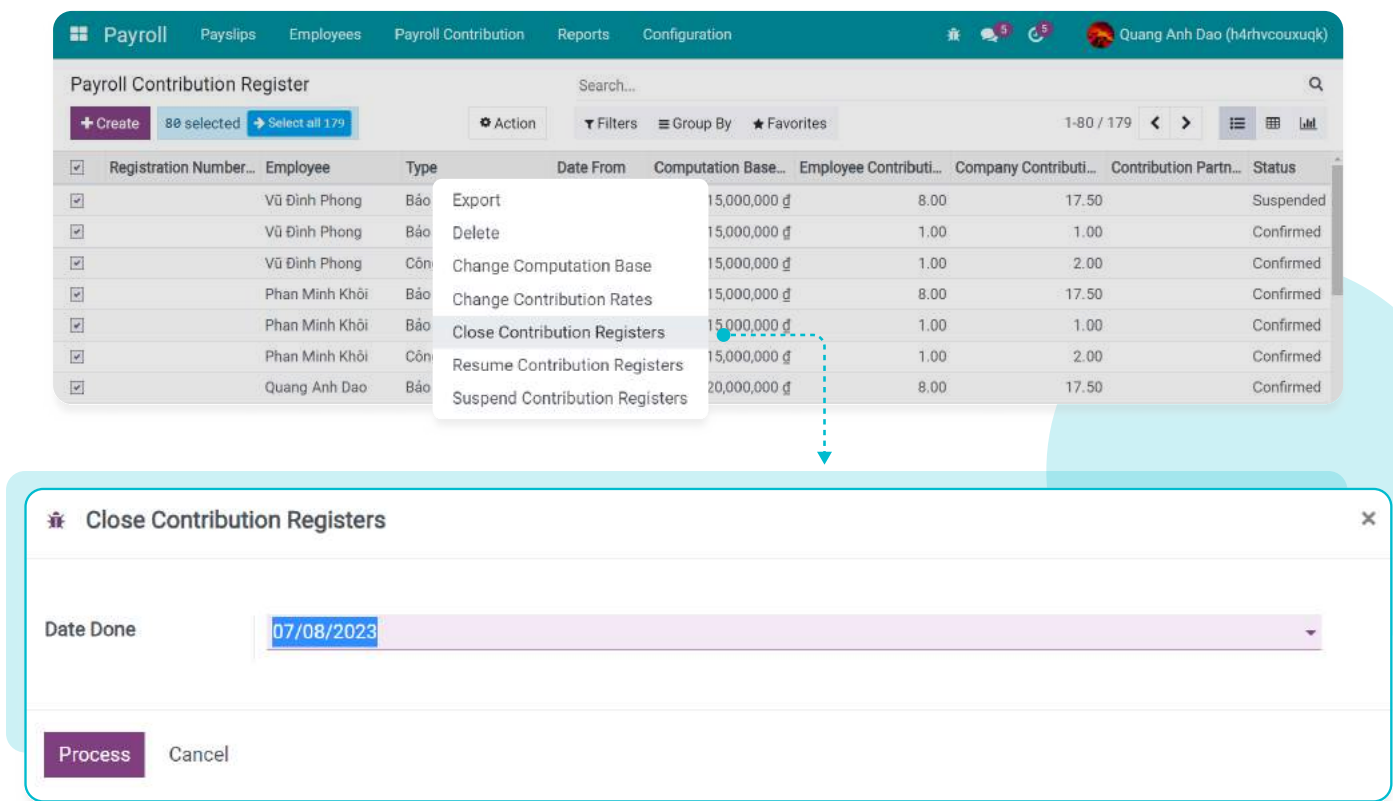
Navigate to **Payroll** ▶ **Payroll Contribution** ▶ **Payroll Contribution Register**:





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 of this employee.

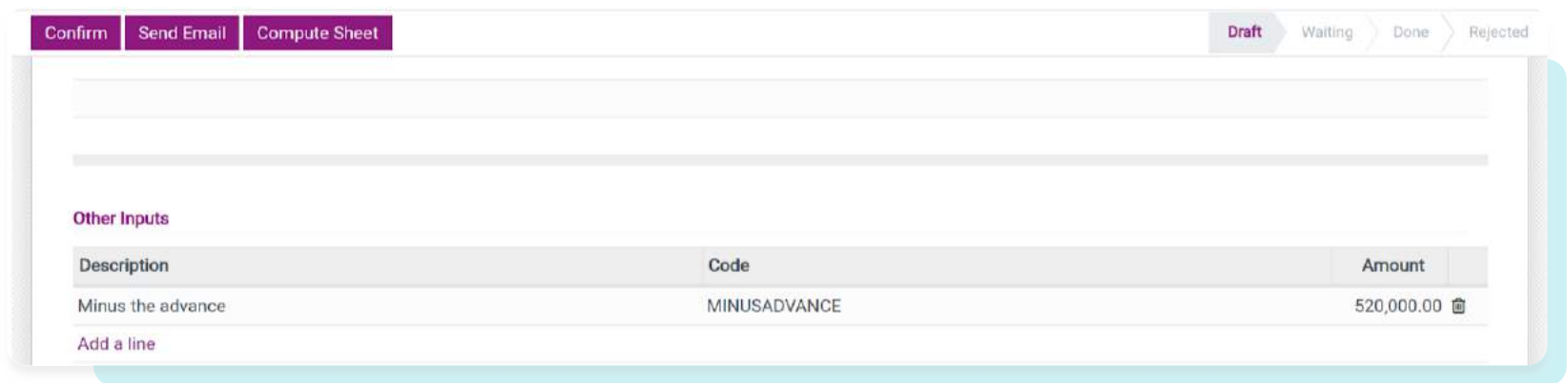
### Calculate the last working month's salary

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

➔ See details at:

- *Create payslips for each employee (Page 160).*

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**. Press **Save** to confirm.

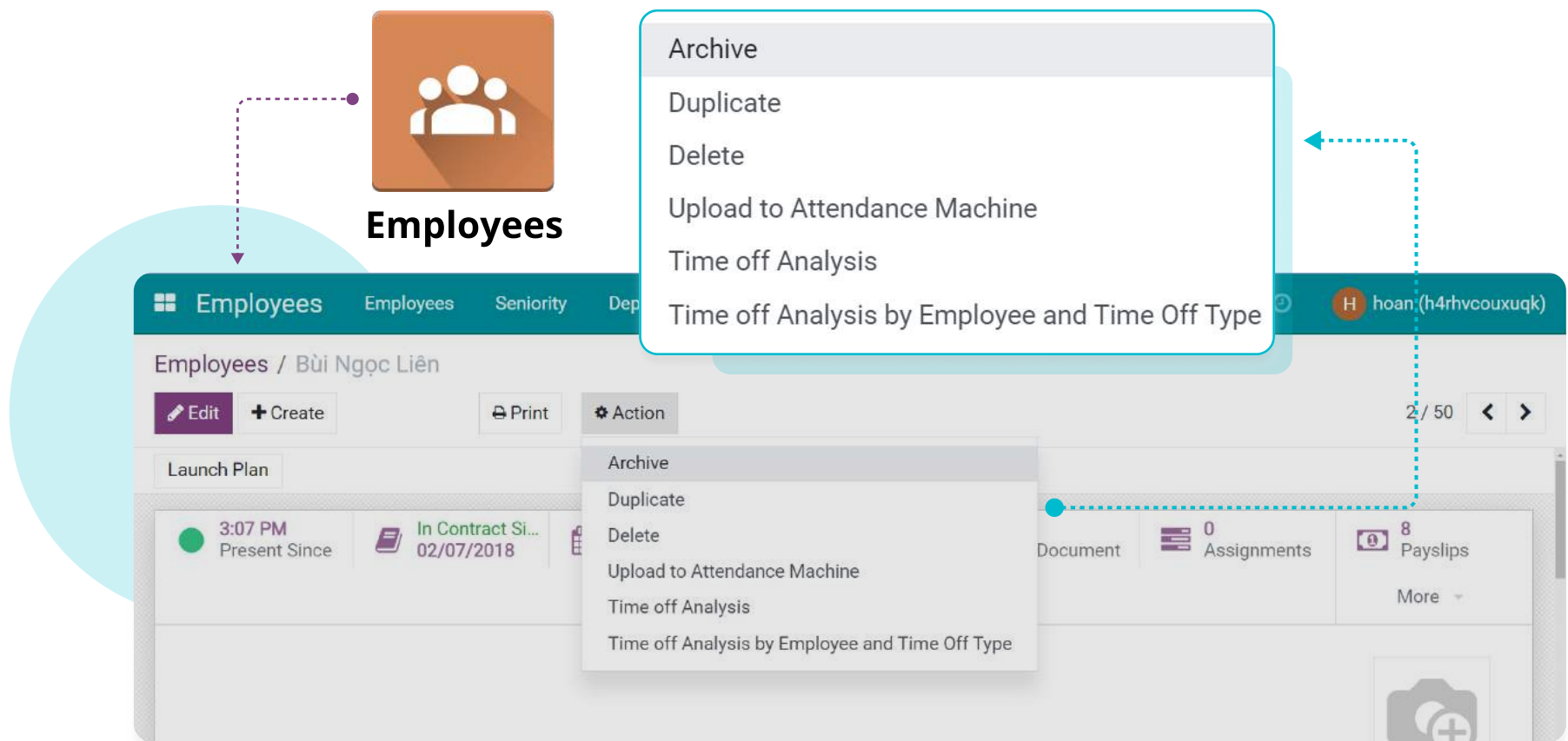




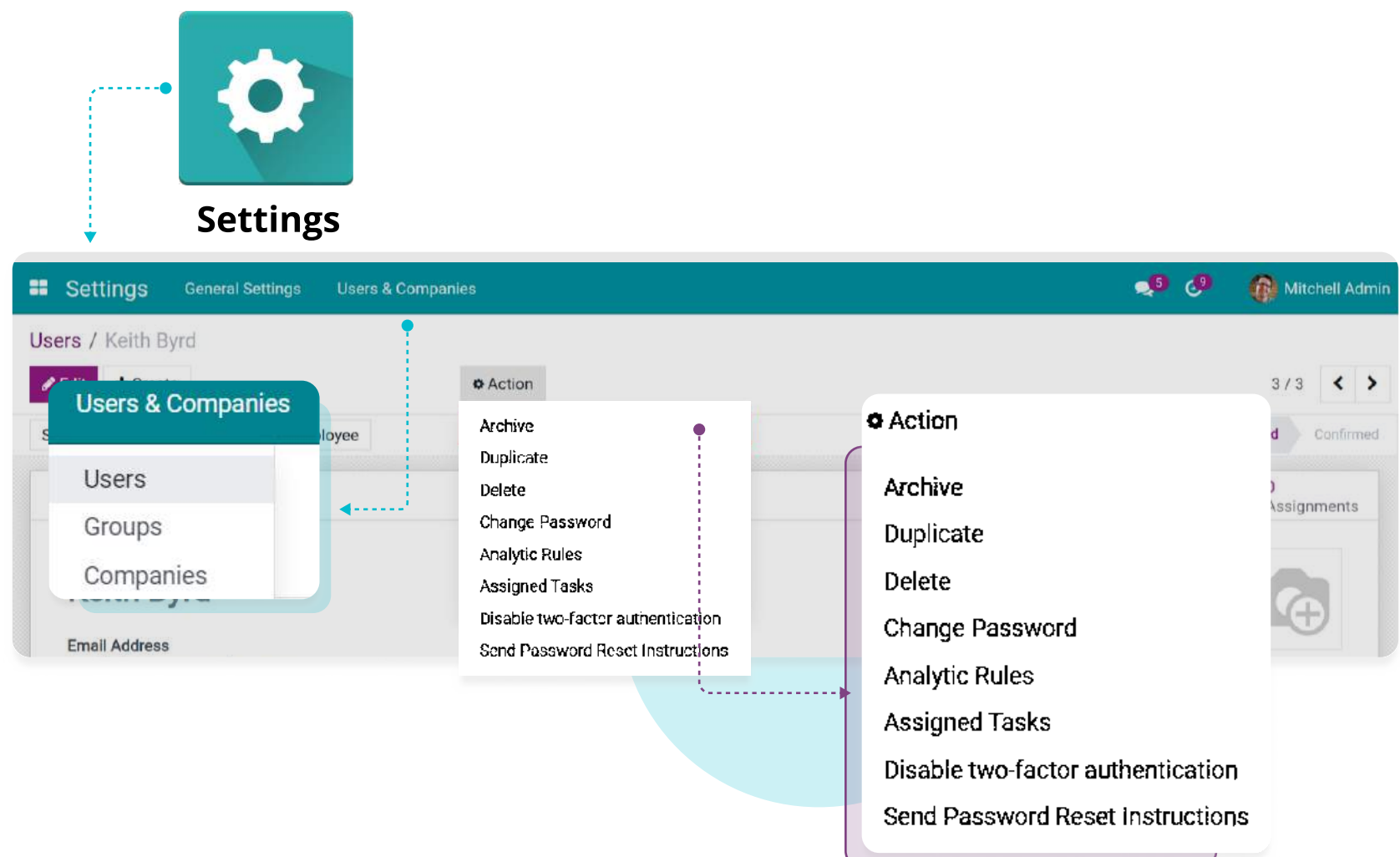
## Archive expired contracts

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

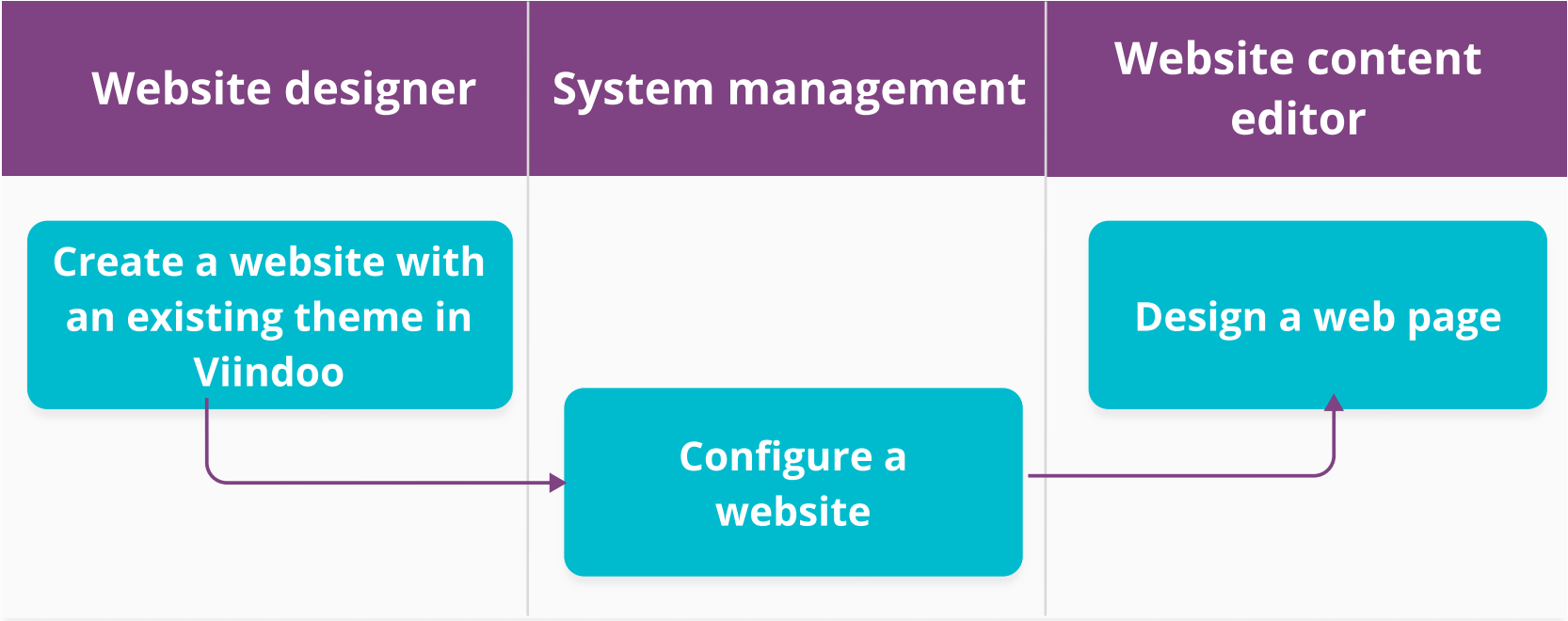
- *For the contract:* Navigate to **Employees** ▶ **Employees**, find the contract of that employee, press **Action**, select **Archive**:



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

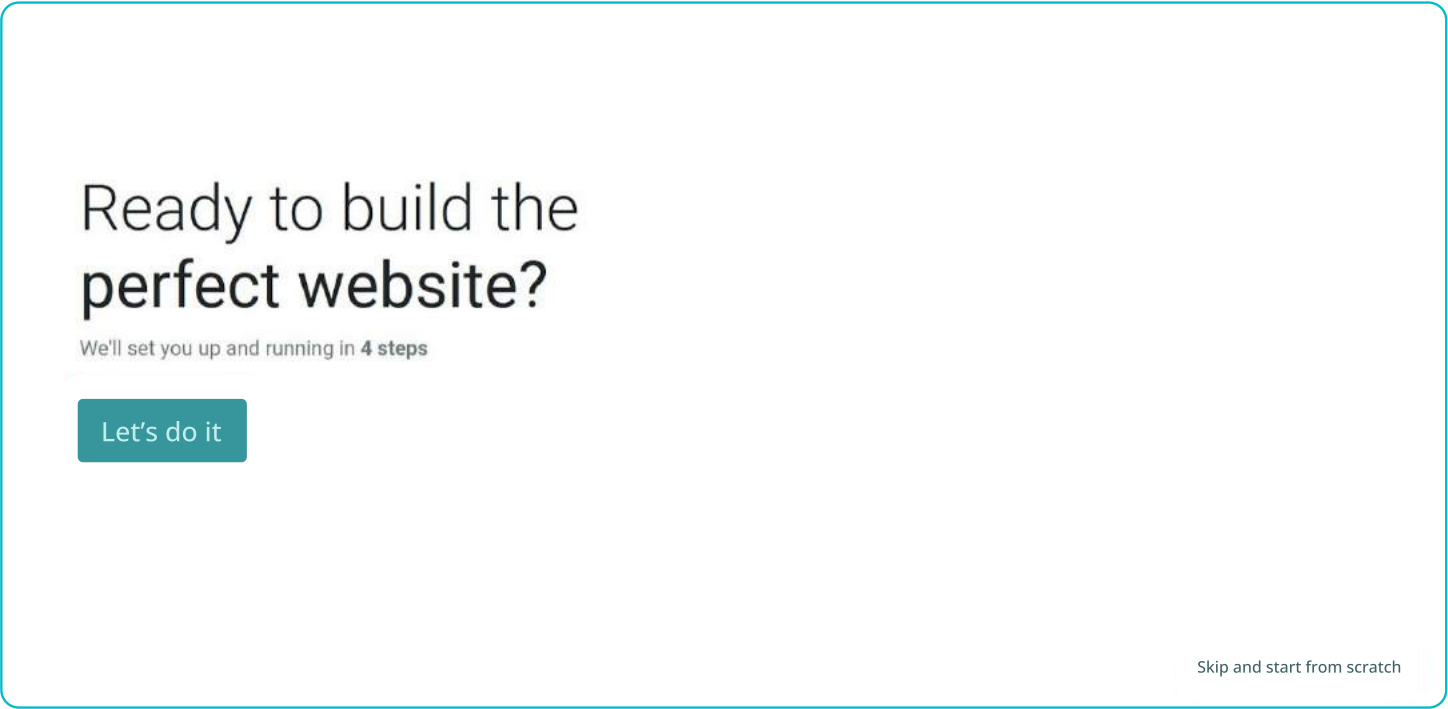


# WEBSITE MANAGEMENT



## 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.

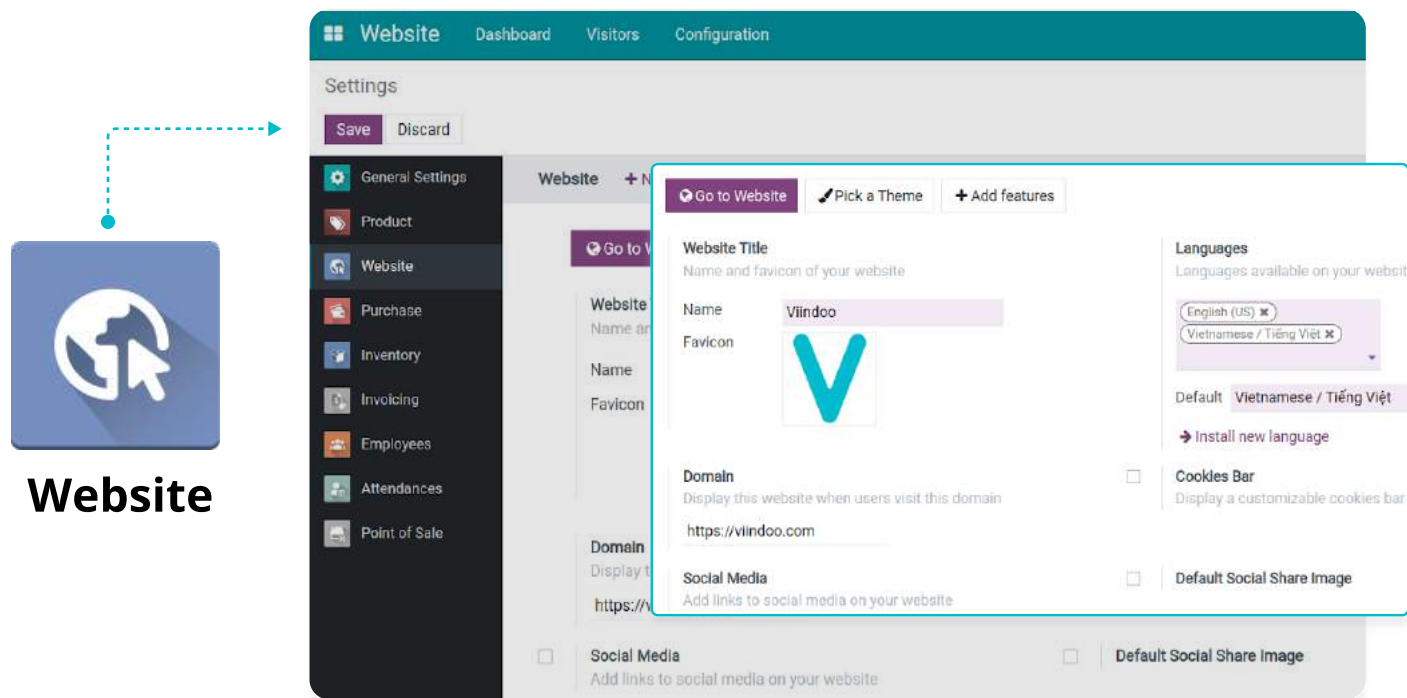
You can always press **Skip and start from scratch** anytime during this process to return to the initial website theme selection interface.

➡ See details at:

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

## CONFIGURE A WEBSITE

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



➔ See details at:

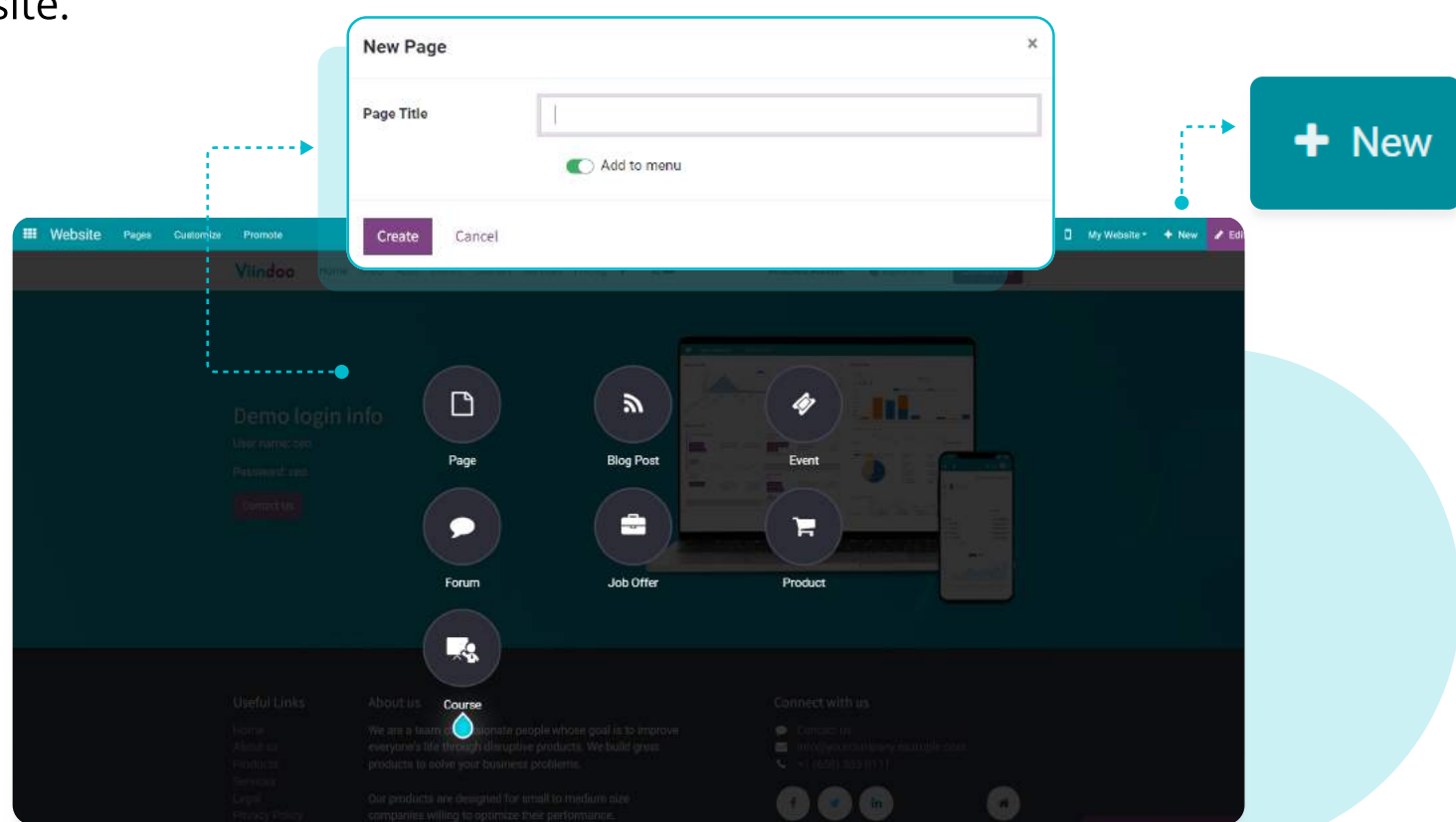
- [\*How to use your own domain name.\*](#)
- [\*How to set up a multi-language website.\*](#)

## DESIGN A WEB PAGE

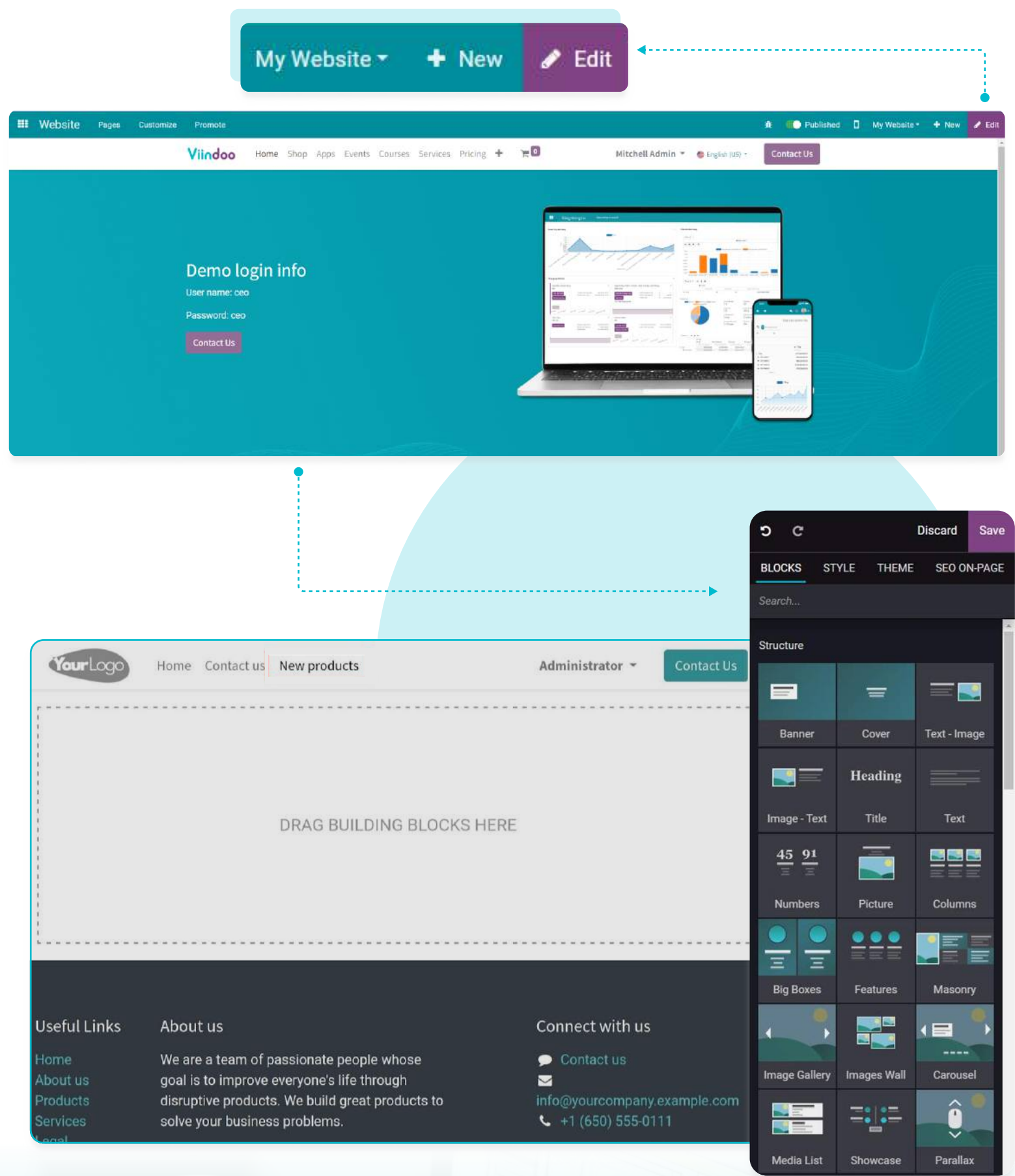
### Create a new web page

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 shown up on 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.

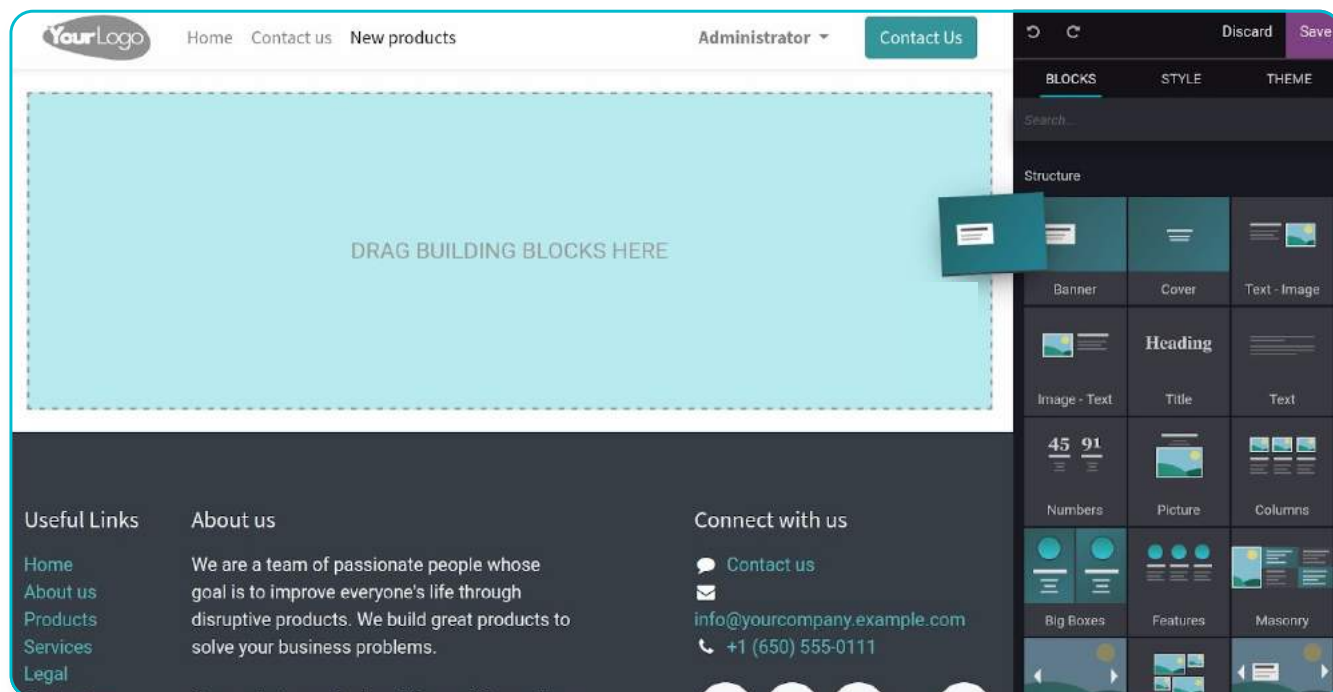




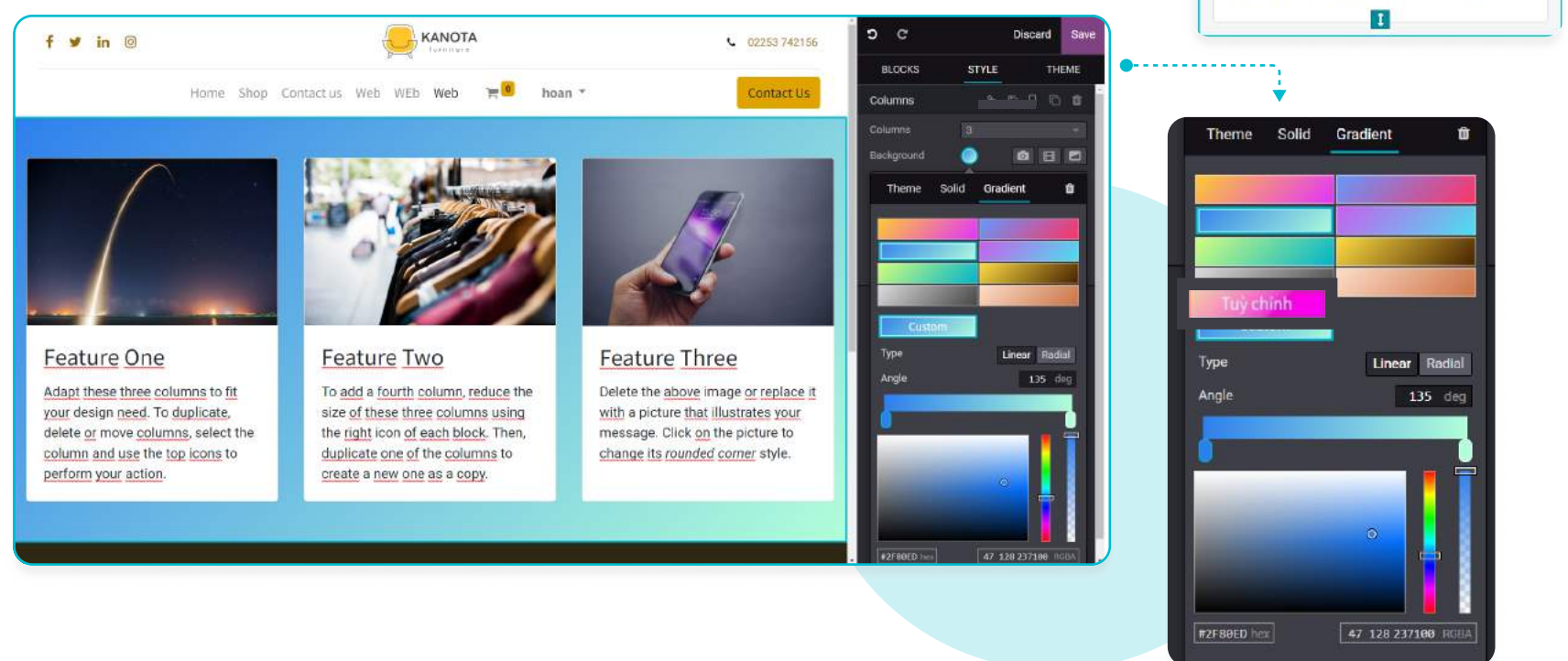
## Create web page content

### 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.

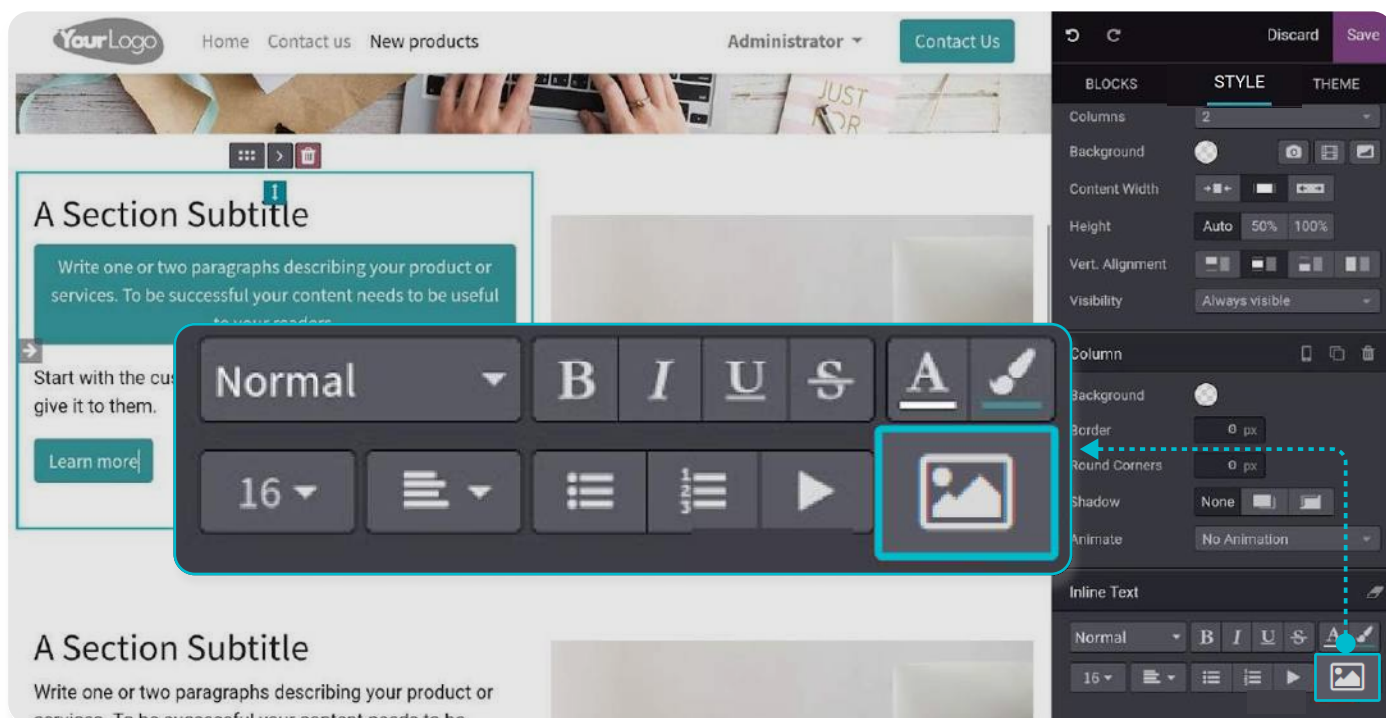


On the other hand, you can change the background color of each content block by going to the **Style** tab, selecting the background type (**Solid** or **Gradient**), then selecting an existing color or pressing **Custom** to create a new one.

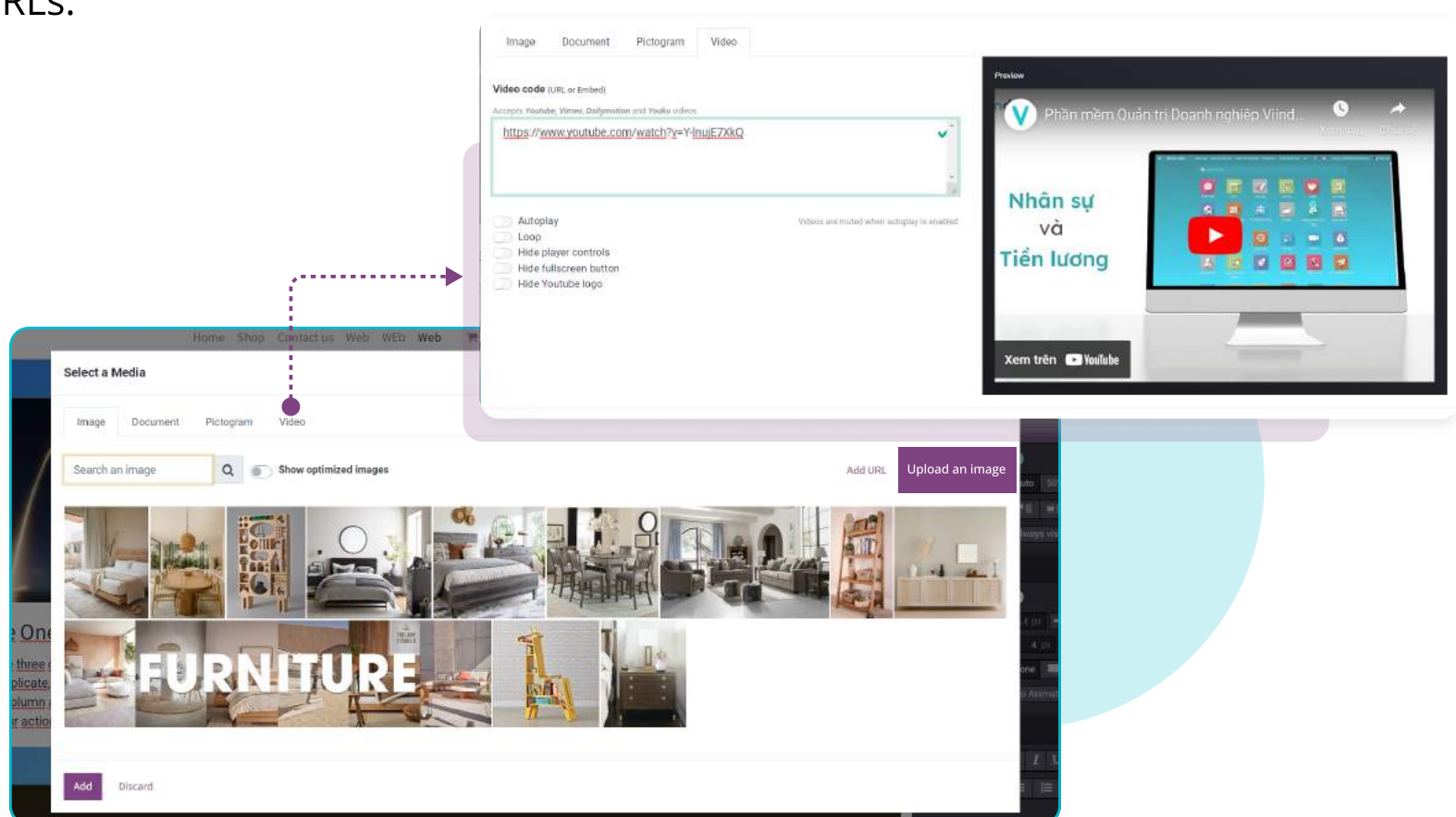
## Insert an image, or video into a webpage

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

**Step 1:** Select the content block where you want to add a certain media, on the Edit master, 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:

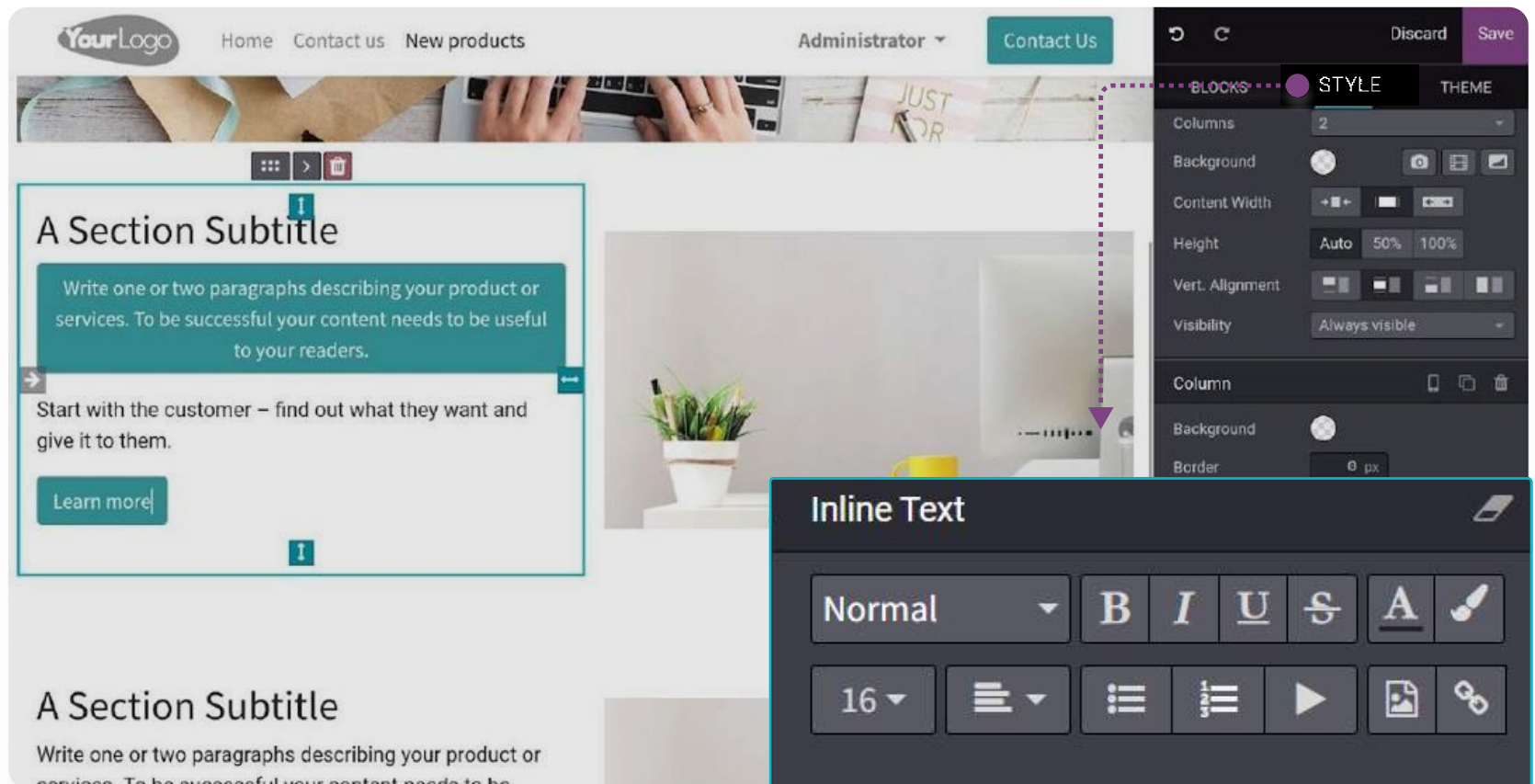
- [How to create and design a new webpage on Website.](#)



## Edit content

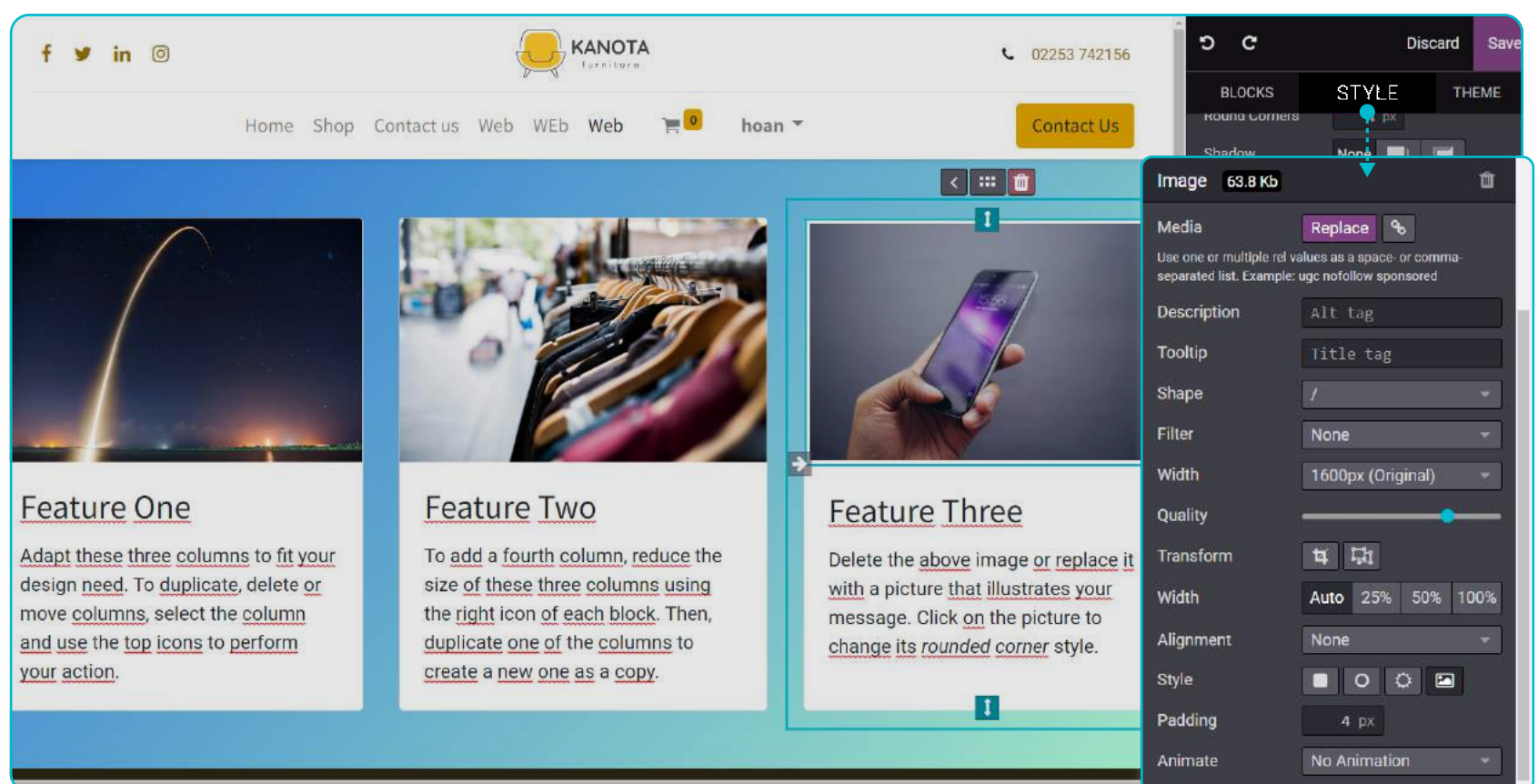
### Edit text content

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.

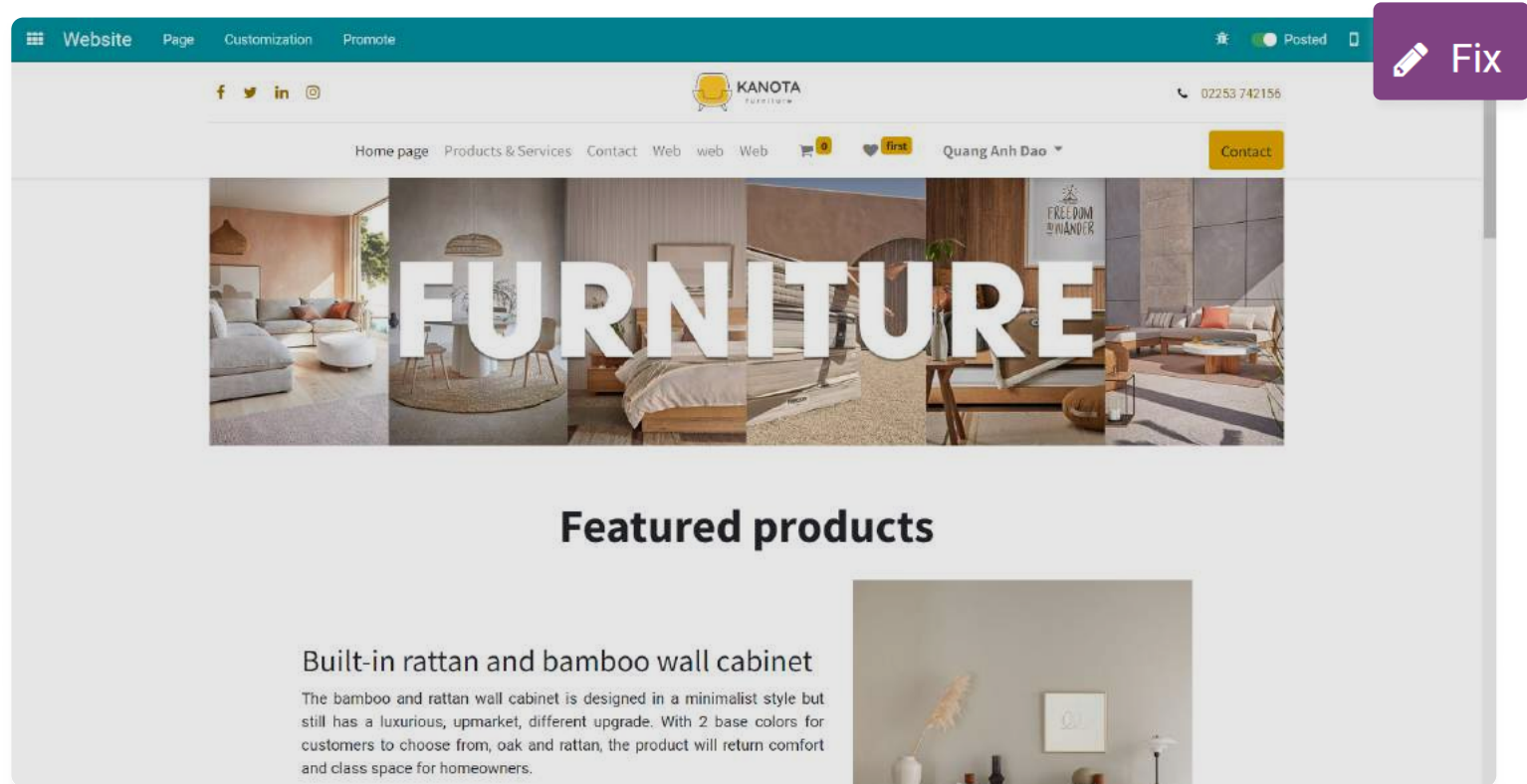


## SEARCH ENGINE OPTIMIZATION (SEO)

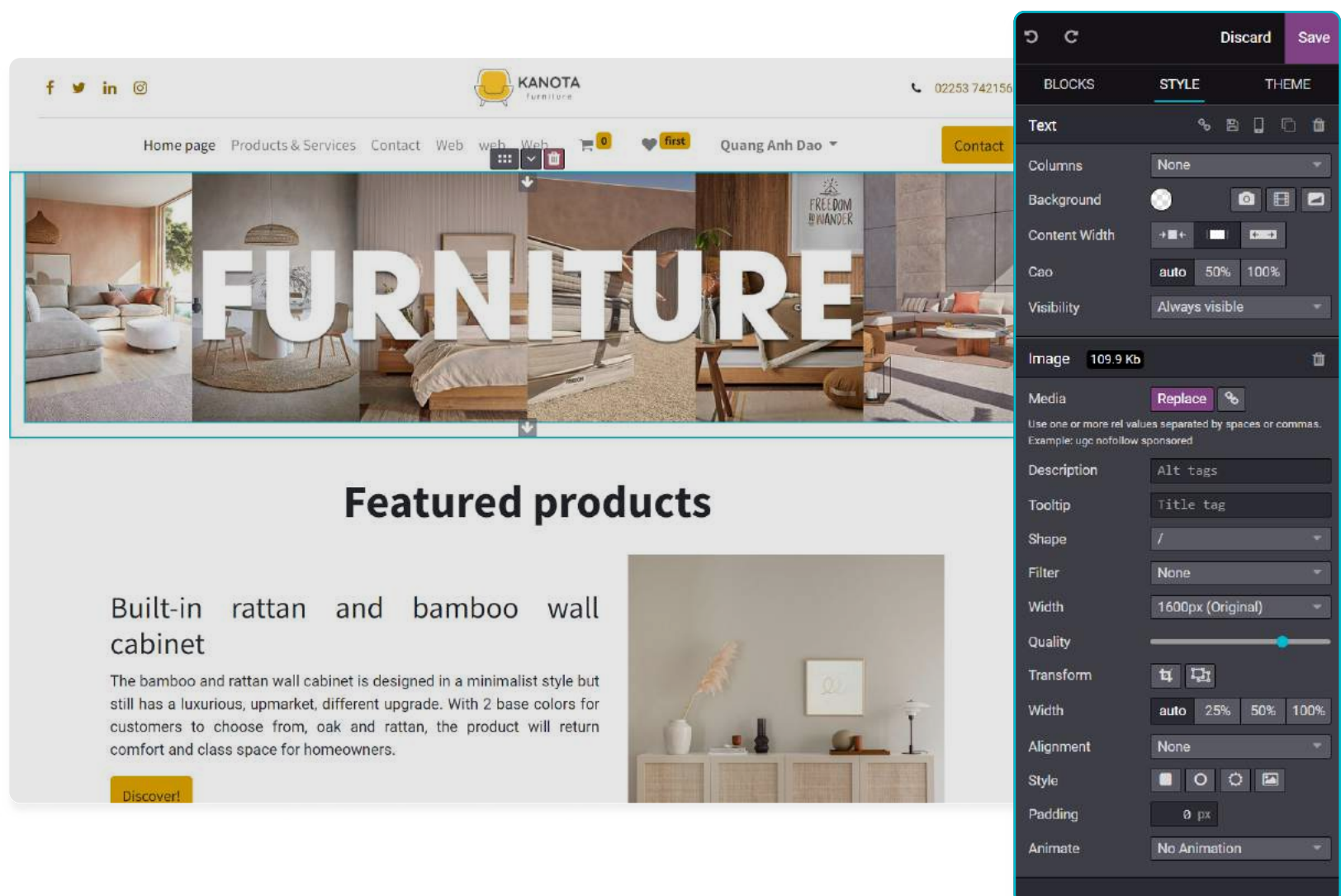
### Optimize contents for SEO

#### *Headers (Headings)*

Step 1: You move to the content you want to SEO and click **Edit**.



Step 2: Select the contents you want to edit. Go to the **Style** tab to select the suitable headers format for your web page then press **Save**.



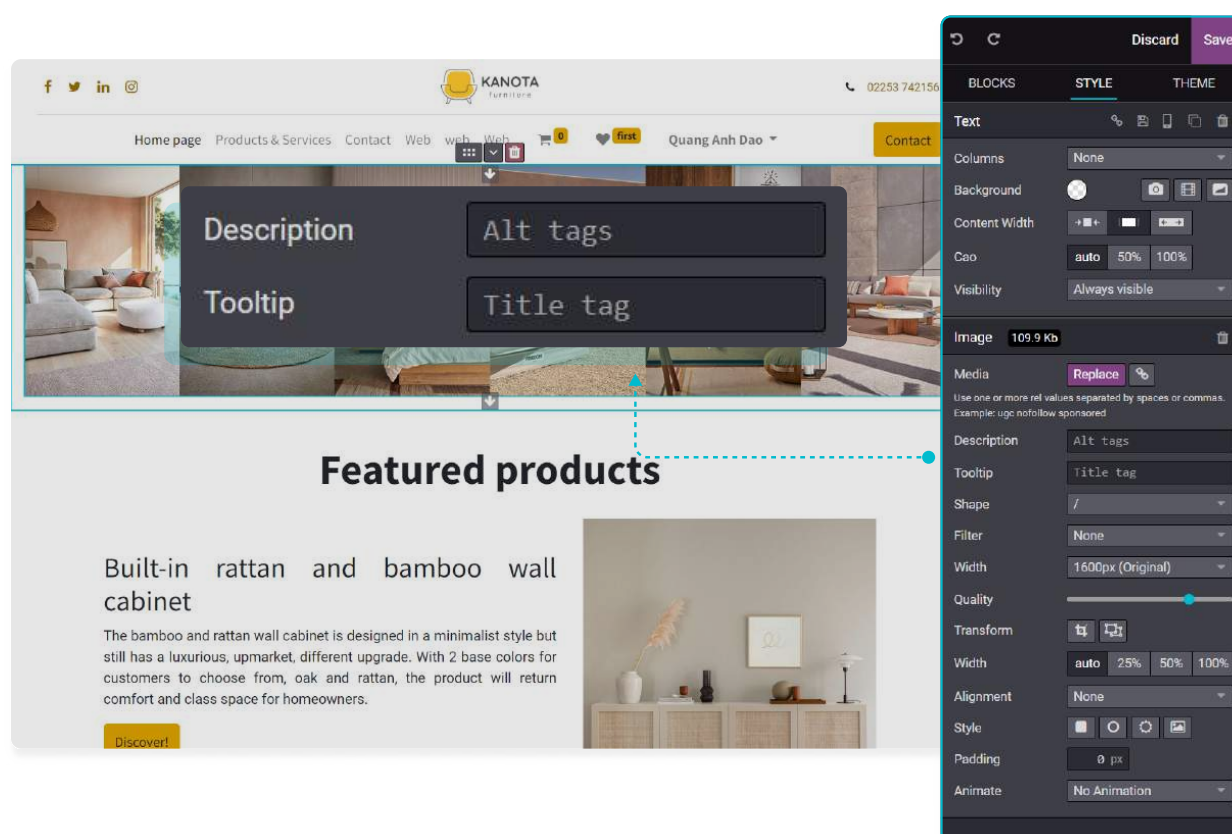


## Images

An optimized image for SEO should have the following attributes:

- *Description (ALT Tag):* Give search engines a brief explanation of the image content which improves the search result quality for web users. In cases the image is broken, web users can still understand what the image wants to show through the description.
- *Tooltip (TITLE Tag):* A brief information to be displayed when the visitor hovers over that image.

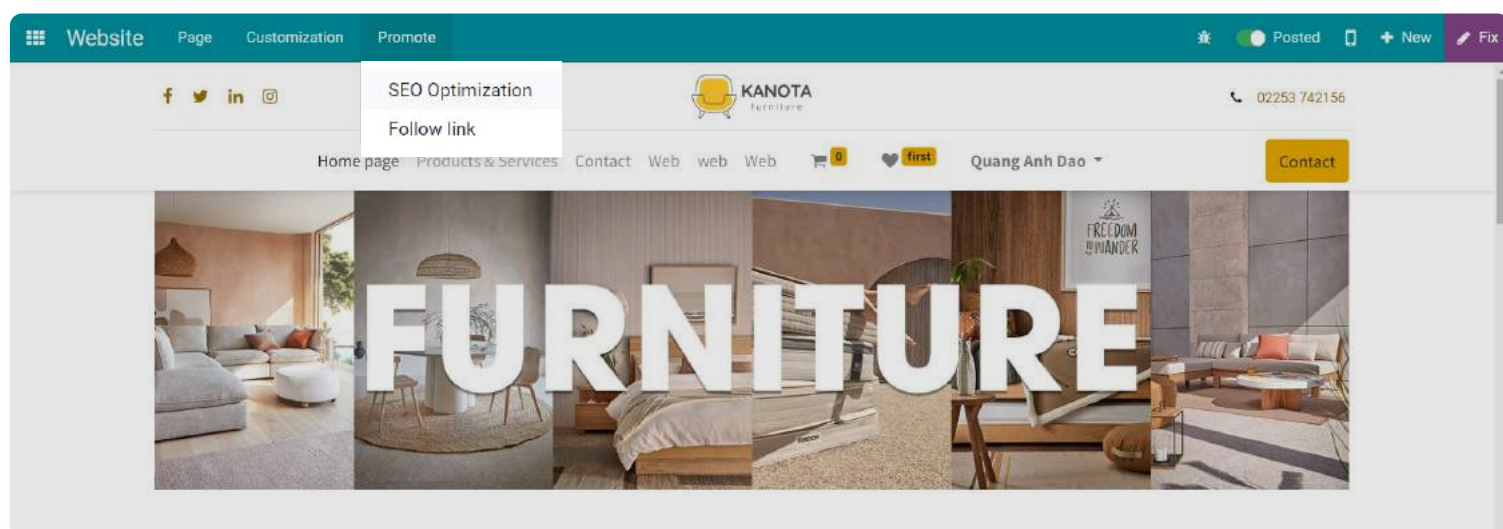
To add **Description (ALT Tag)** and **Tooltip (TITLE Tag)** attributes to an image, select the image you want to add then go to the **Style** tab to add this information into the **Description** and **Tooltip** fields. Press **Save** to finish.



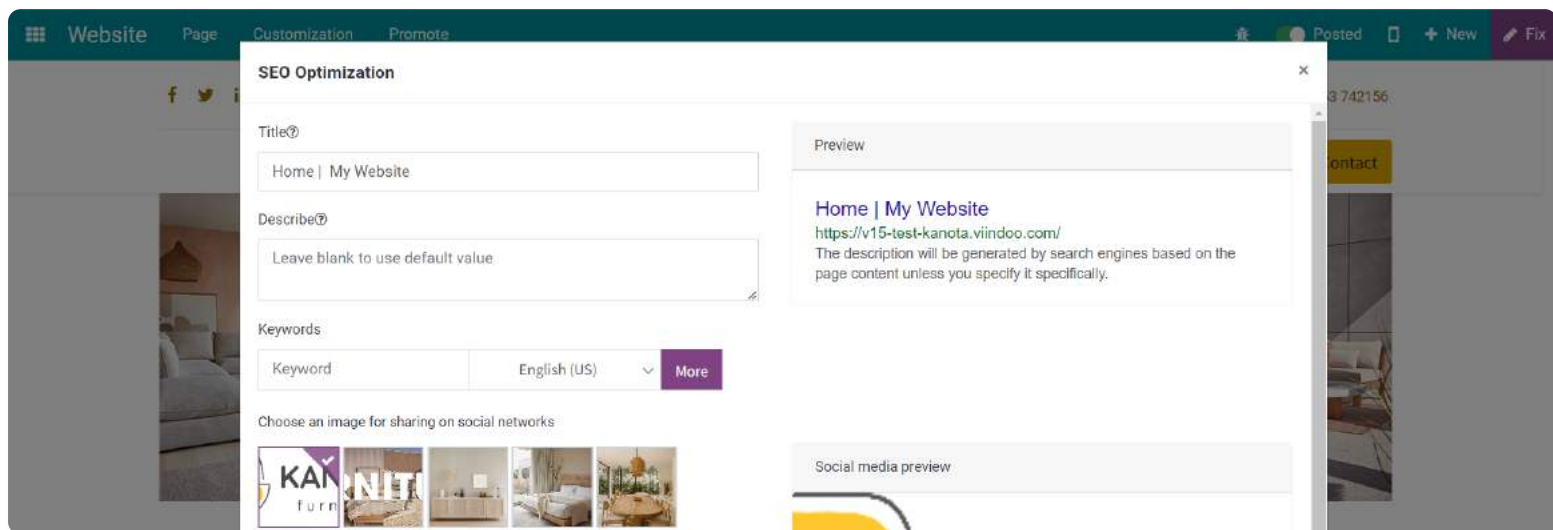
## Optimize web pages for SEO

### Title and description

*Step 1:* On the editing Website view, navigate to **Promote** ► **Optimize SEO** on the menu bar.



Step 2: Now, the Optimize SEO pop-up will appear so you can edit the **Title** and **Description** for your webpage, then press **Save**.

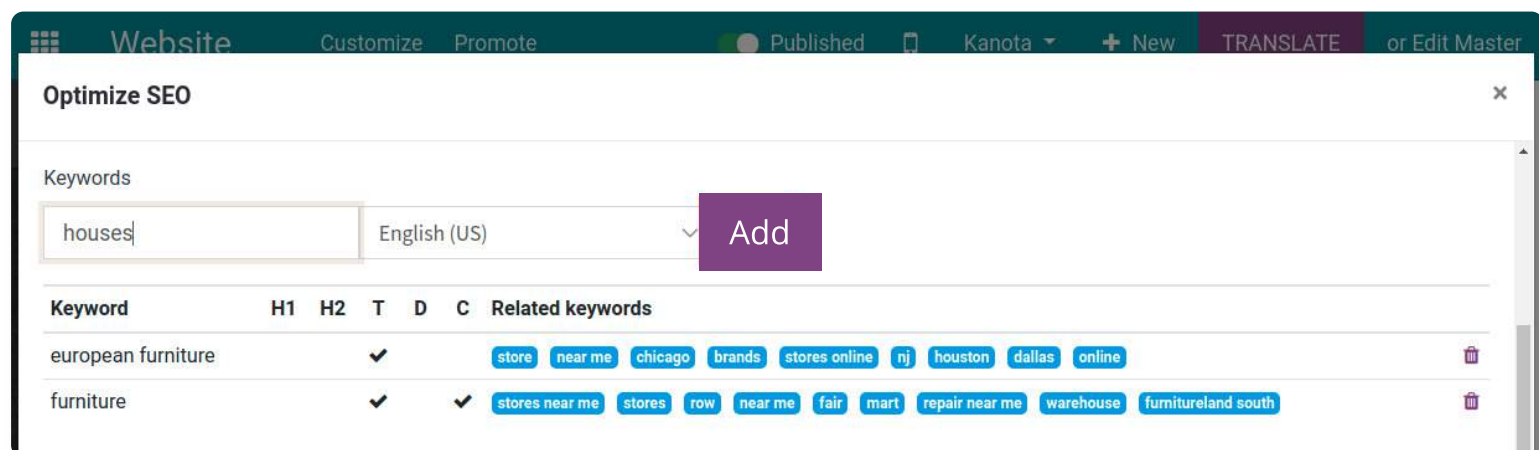


However, to ensure that your site's title and description are fully displayed on the Google search results, be aware that:

- *Length of title:* No more than 70 characters.
- *Length of description:* No more than 160 characters.

## Keywords

Navigate to **Promote** ▶ **Optimize SEO**. In the **Keywords** section, add the main keyword and related keywords to the website's content. These keywords help both the search engine and users easily find and understand your website content which then improves its ranking on Google's search results page.



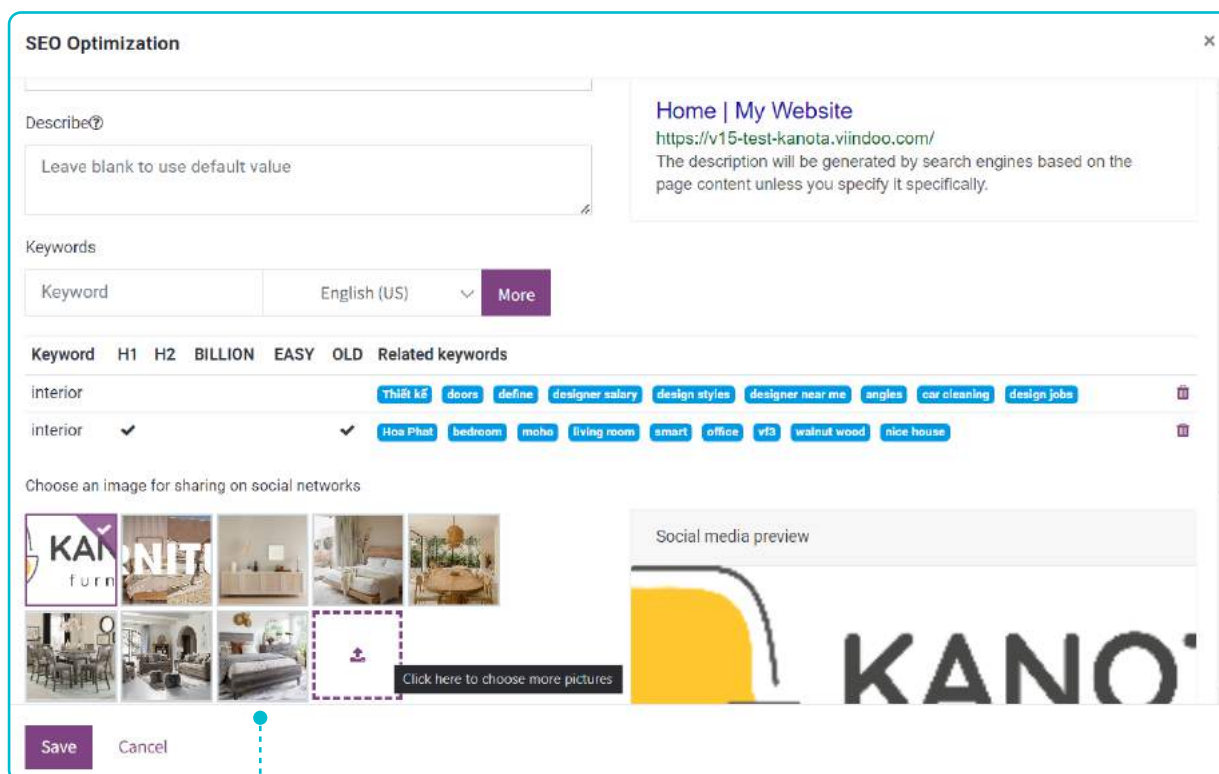
- *H1:* Keywords appear on the Header 1 (Heading 1).
- *H2:* Keywords appear on the Header 2 (Heading 2).
- *T:* Keywords appear on the web page title.
- *D:* Keywords appear on the web page description.
- *C:* Keywords appear on the contents.

In addition, Viindoo system will recommend relative keywords for each keyword you added.

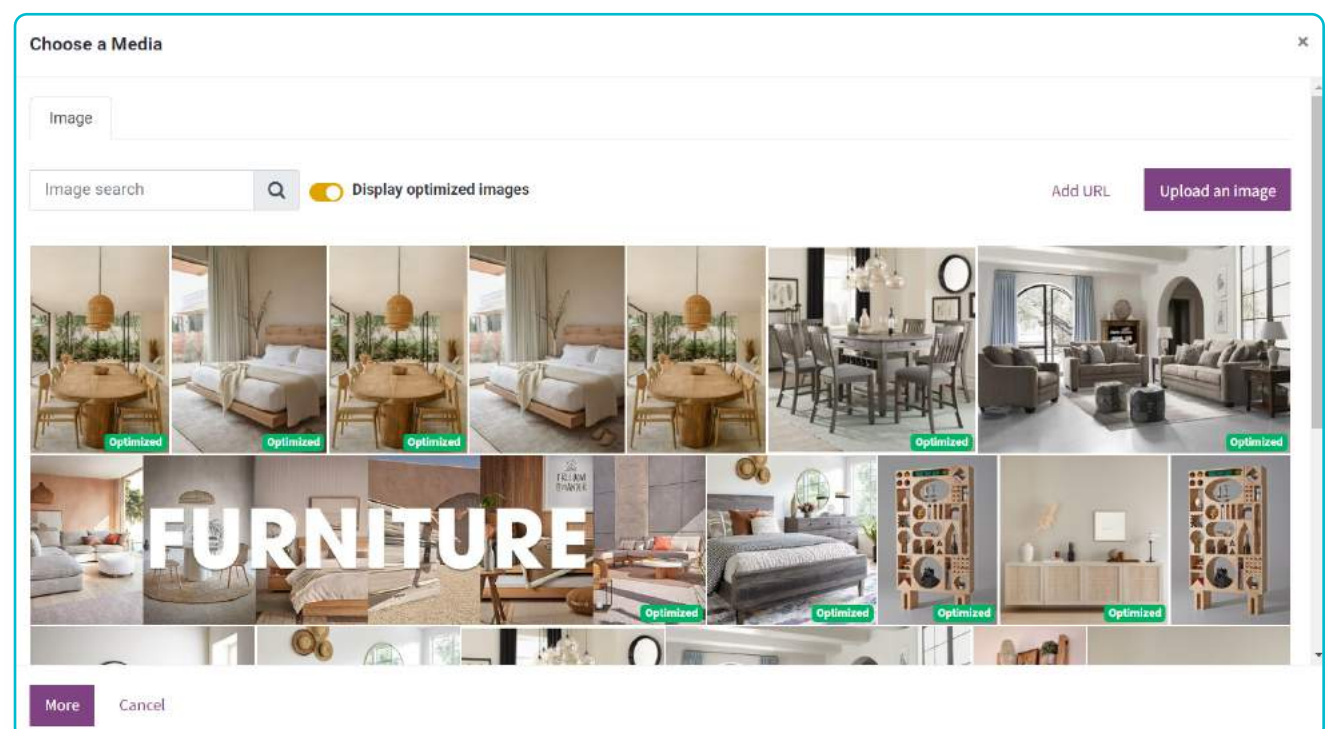
## Thumbnails

A thumbnail is a reduced-size version of an image, normally used for an article or a video. The thumbnail is widely used on the Google search engine, social media, etc. in order to help users quickly understand the content of your article or video at a glance.

*Step 1:* At the Optimize SEO pop-up, click on **Click here to add images** button to choose an image to represent the Website.



*Step 2:* You can **Upload an image** or **Add URL** to the image you want to use as a thumbnail for your website.



Then, click **Save** to confirm the change you just made.



## VISUAL REPORTS OF BUSINESS PERFORMANCE

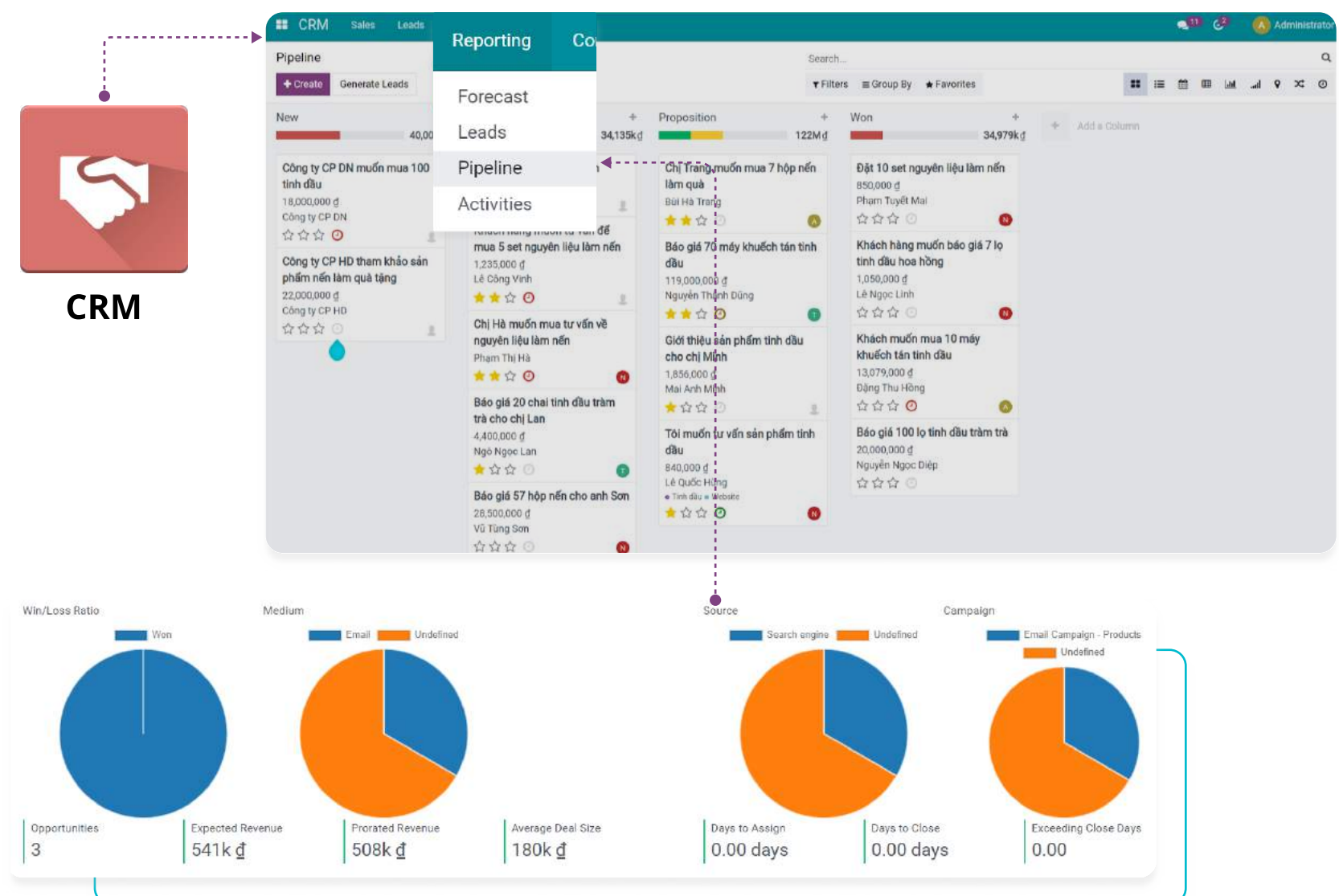
Data on Viindoo software is automatically aggregated into different types of reports. On the software modules, the managers can access the **Reporting** menu to view reports with updated data instantly.



### COMMONLY USED REPORTS

#### Opportunity analysis report

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

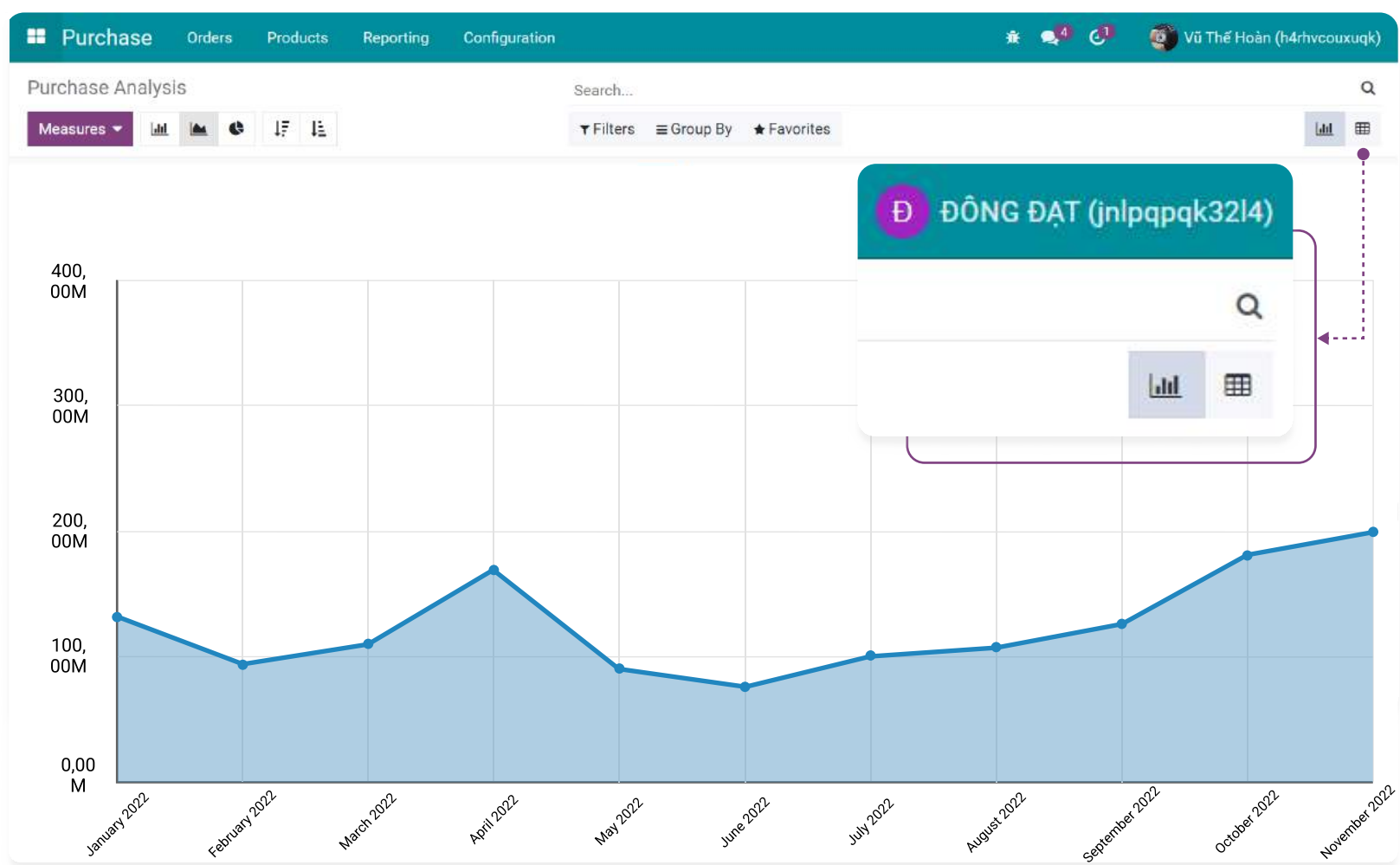



The opportunity analysis report is a tool to help track metrics related to customer service, the number of opportunities, expected revenue, success rate, v.v. You can view the information in this report in the form of a graph or a breakdown (pivot).



## 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.

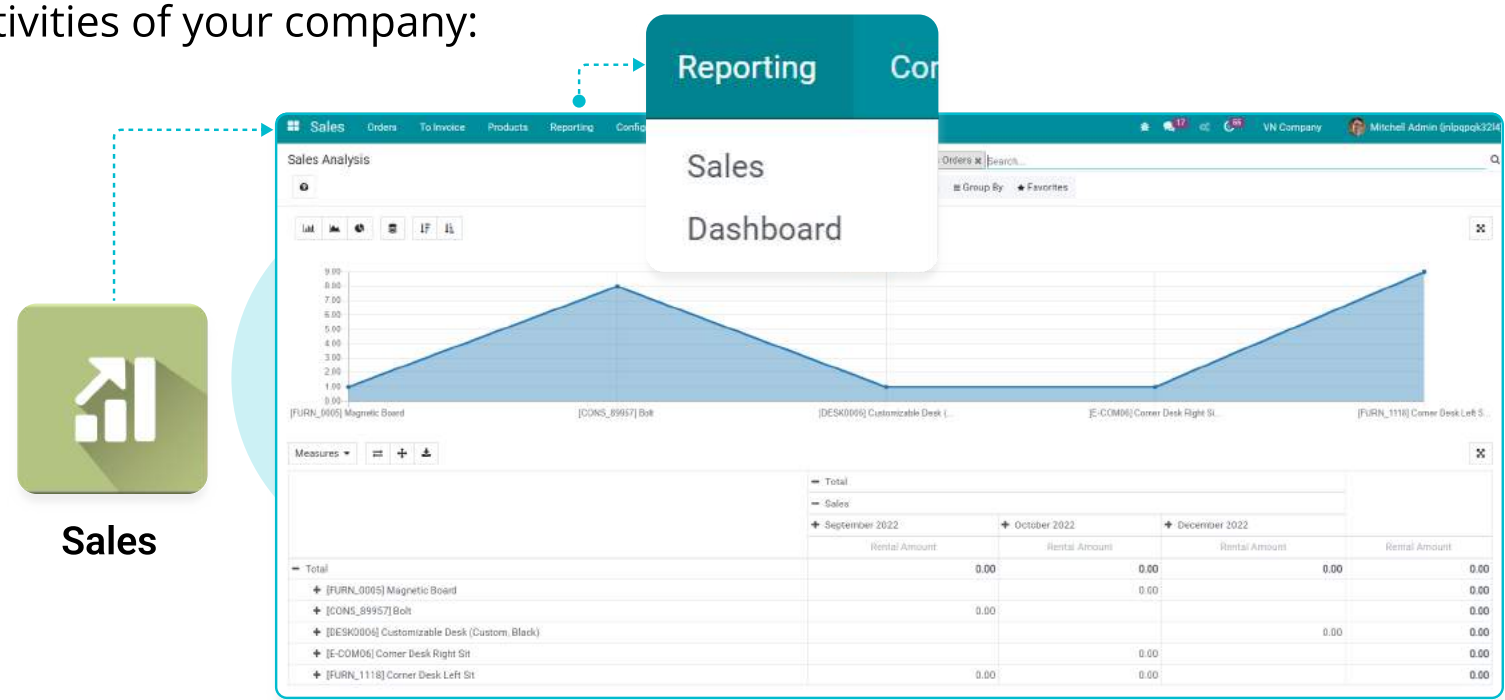
The screenshot shows the 'Purchase Analysis' interface with a pivot table. The table displays purchase data for February 2023, filtered by 'Order Date: Month'. The table includes columns for Order, Qty Ordered, Qty Received, Qty Billed, Untaxed Total, and Total. A callout box highlights the 'Order Date: Month' filter and the 'Group By' button.

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



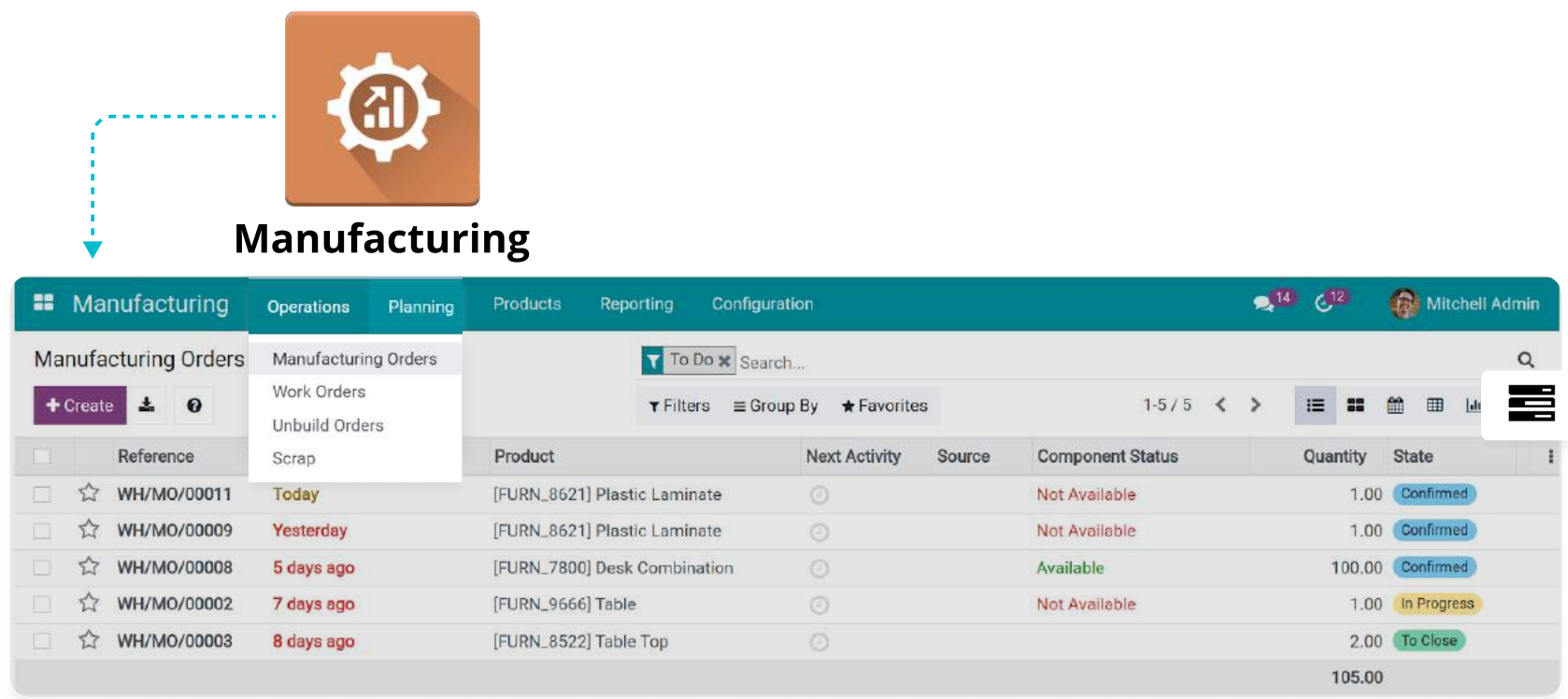
You use tools such as filtering, and grouping to filter out information about the sales activities such as the number of customers, and the generated revenue in the month.



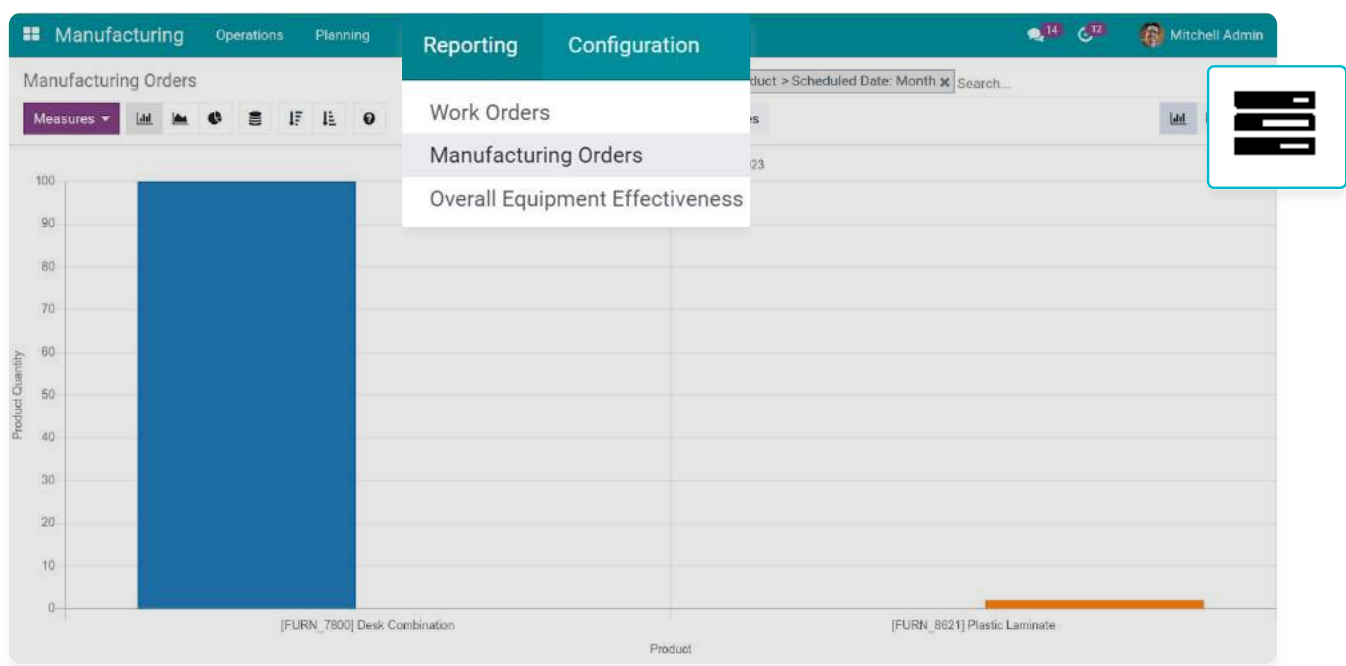
Manufacturing report

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

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

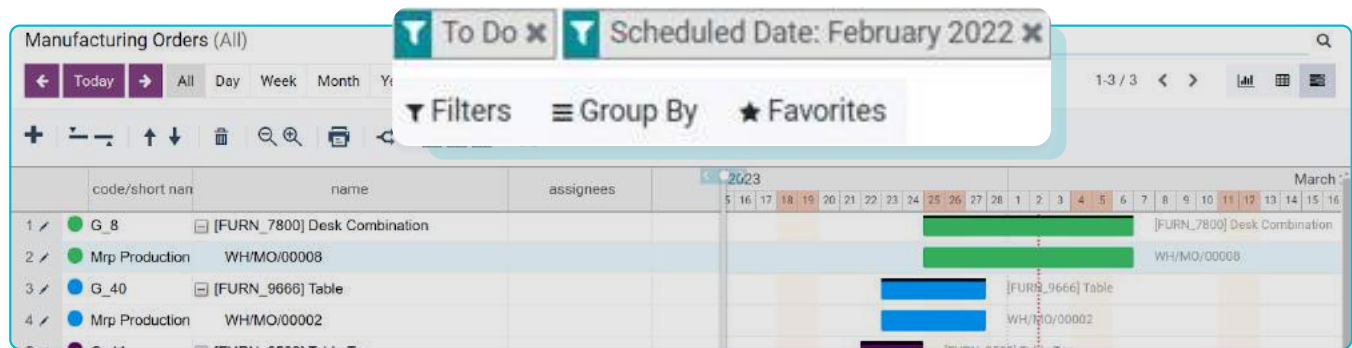


Method 2: Go to **Manufacturing** ▶ **Reporting** ▶ **Manufacturing Orders**, and select the Gantt icon in the right corner of the screen.



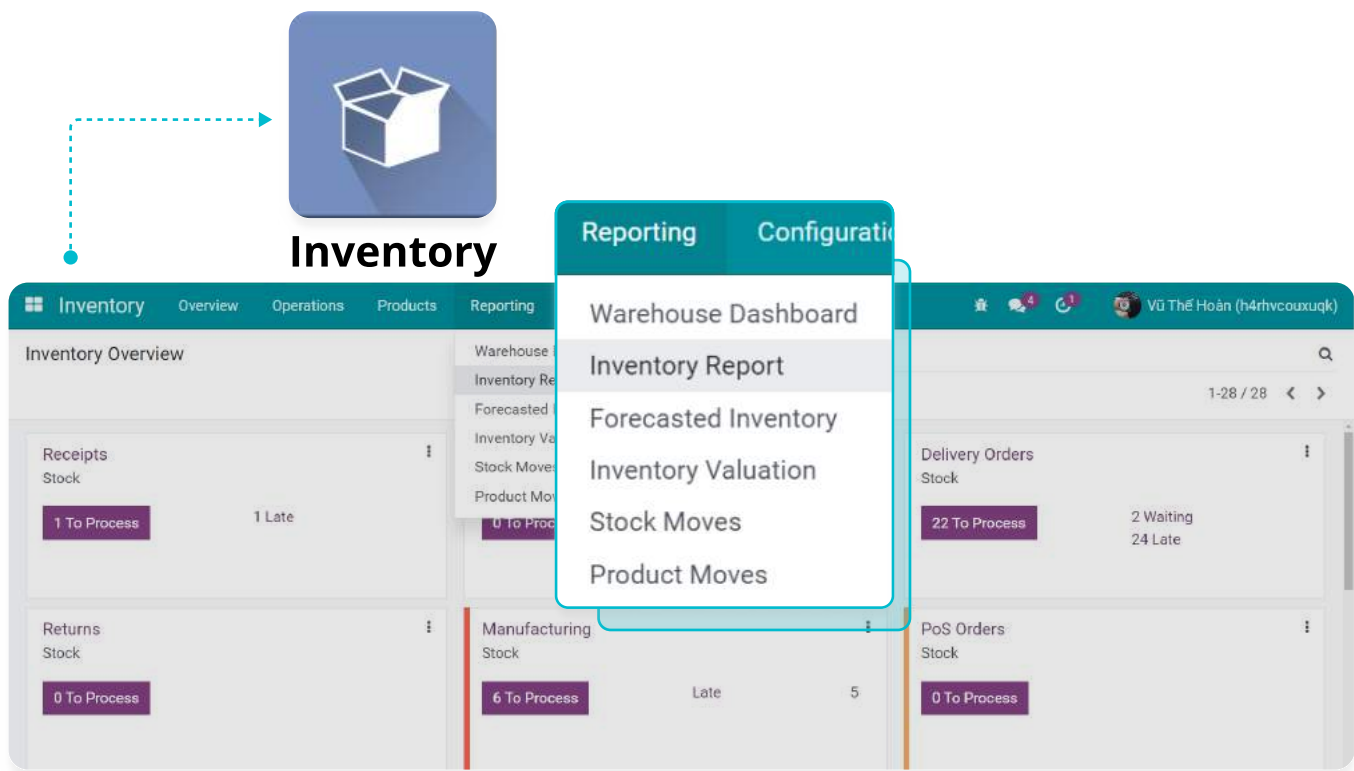
You will be redirected to the Gantt chart interface with information about the production progress.

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



Inventory report

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



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

**Stock On Hand**

Internal Locations | Product > Location | Search...

Filters | Group By | Favorites | 1-44 / 44

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

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

**Inventory** | Overview | Operations | Products | Reporting | **Vietnam Legal Reports** | + | VN Company | Mitchell Admin (jnlppqk3214)

Inventory Overview

Receipts: 1 To Process, 1 Late | Delivery Orders: 0 To Process, 3 Waiting, 3 Late | Returns: 0 To Process

- Product Journal (S10-DN)
- General Inventory Journal (S11-DN)**
- Stock-In Report
- Stock-Out Report
- Stock Card (S12-DN)

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

**GENERAL INVENTORY JOURNAL**

Dates: Date From: 02/01/2023 06:00:00, Date To: 02/20/2023 13:21:08

Stock: Product Category

**Print** or Cancel

**GENERAL INVENTORY JOURNAL**

Date From: 02/01/2023 06:00:00 - Date To: 02/20/2023 07:21:08

Warehouse: All

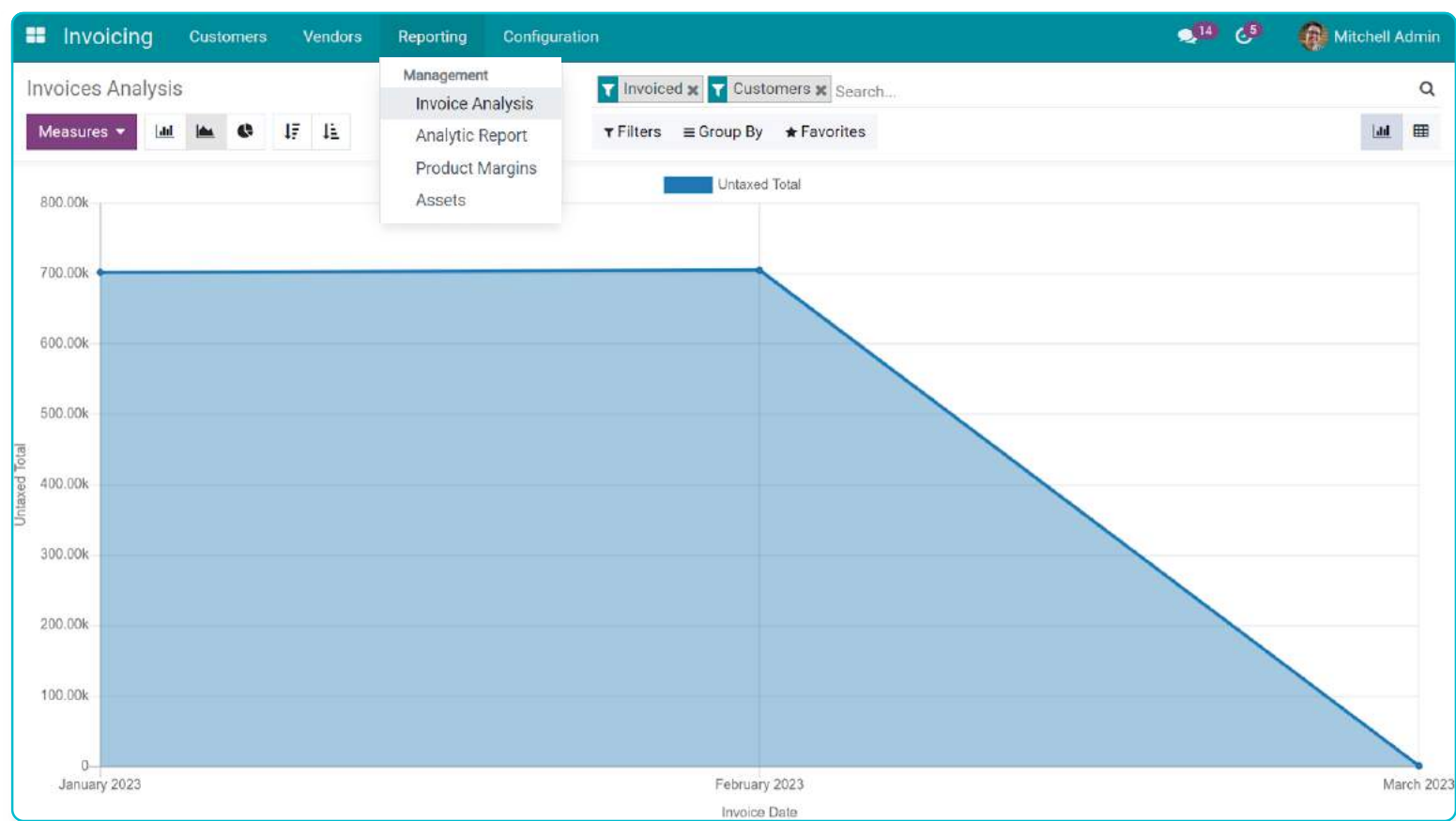
Currency: VND


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

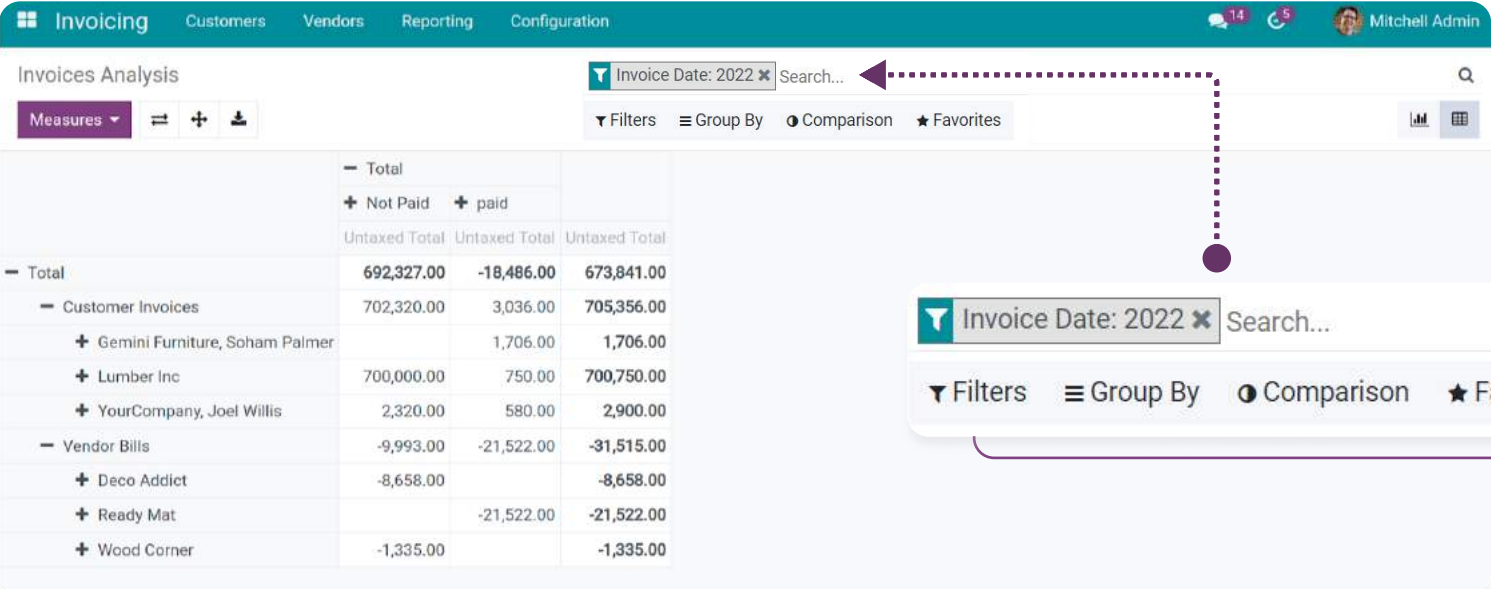


## Invoicing report

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.



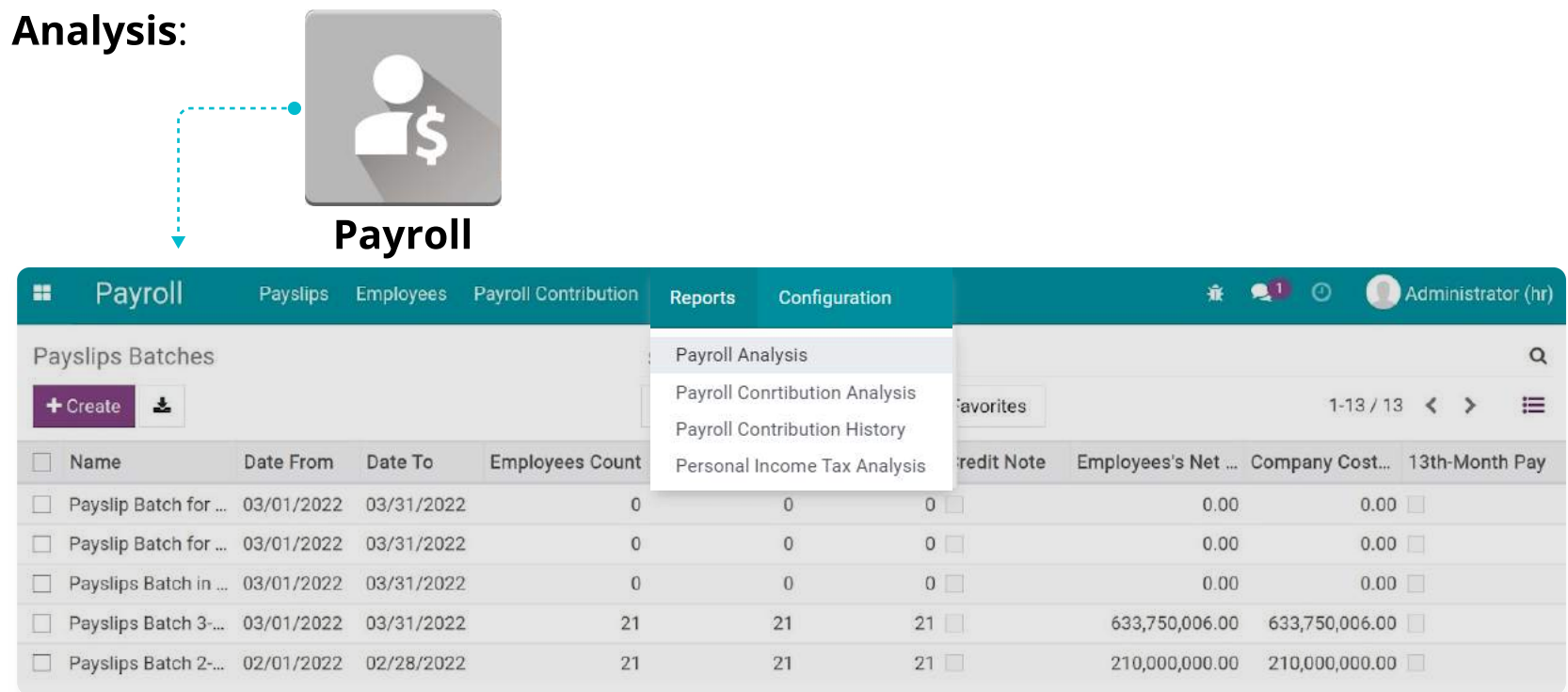
	- Total		
	+ Not Paid	+ paid	
	Untaxed Total	Untaxed Total	Untaxed Total
- Total	692,327.00	-18,486.00	673,841.00
- Customer Invoices	702,320.00	3,036.00	705,356.00
+ Gemini Furniture, Soham Palmer		1,706.00	1,706.00
+ Lumber Inc	700,000.00	750.00	700,750.00
+ YourCompany, Joel Willis	2,320.00	580.00	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.

## Payroll analysis report

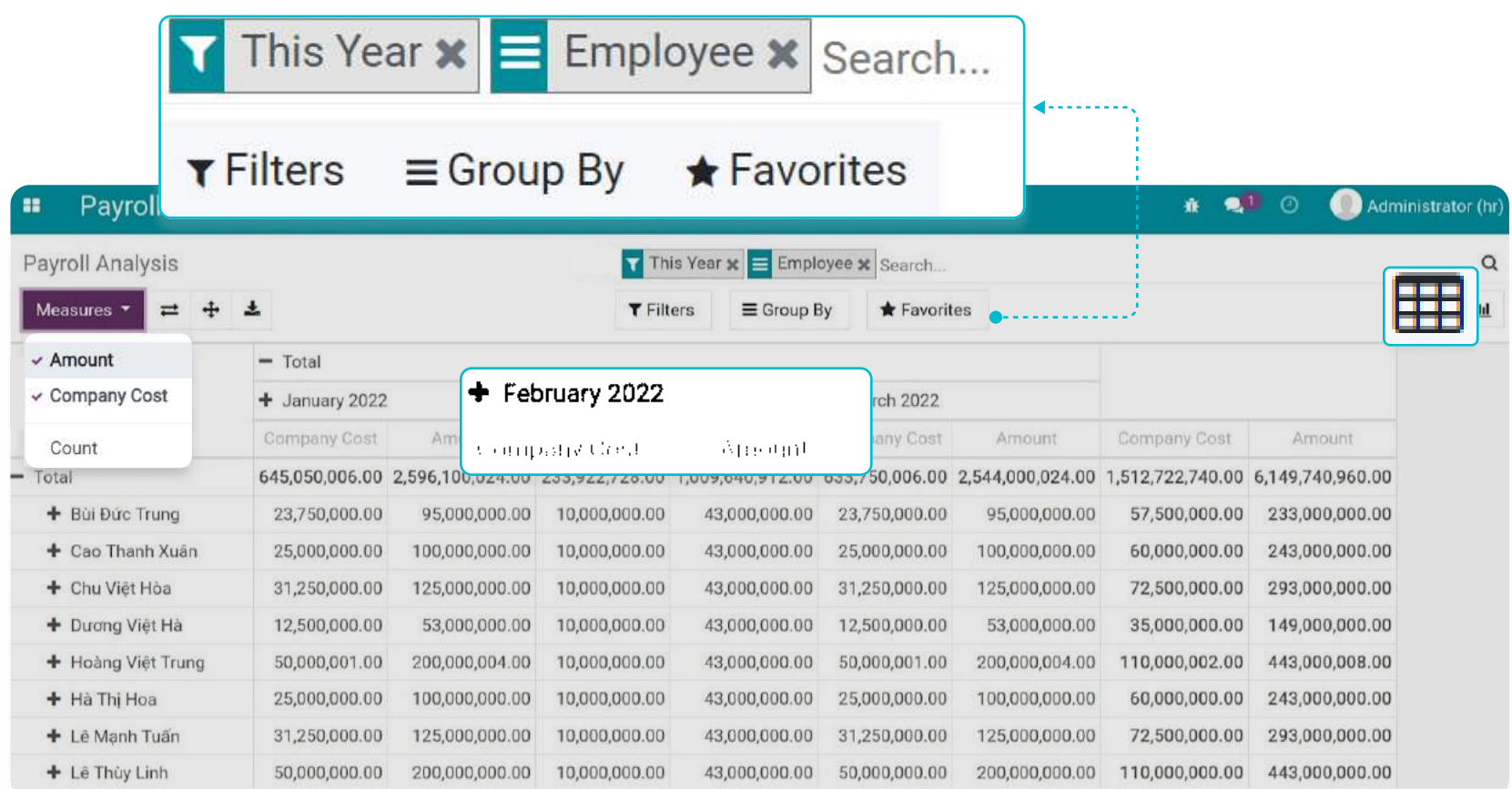
The **Payroll Analysis** report gives you an overall picture of the salary, bonus, and expenses in the company according to monthly and yearly analysis data. Viindoo supports you with flexible payroll [analysis reports](#) from pivot analysis to visual graphs over time, v.v.

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

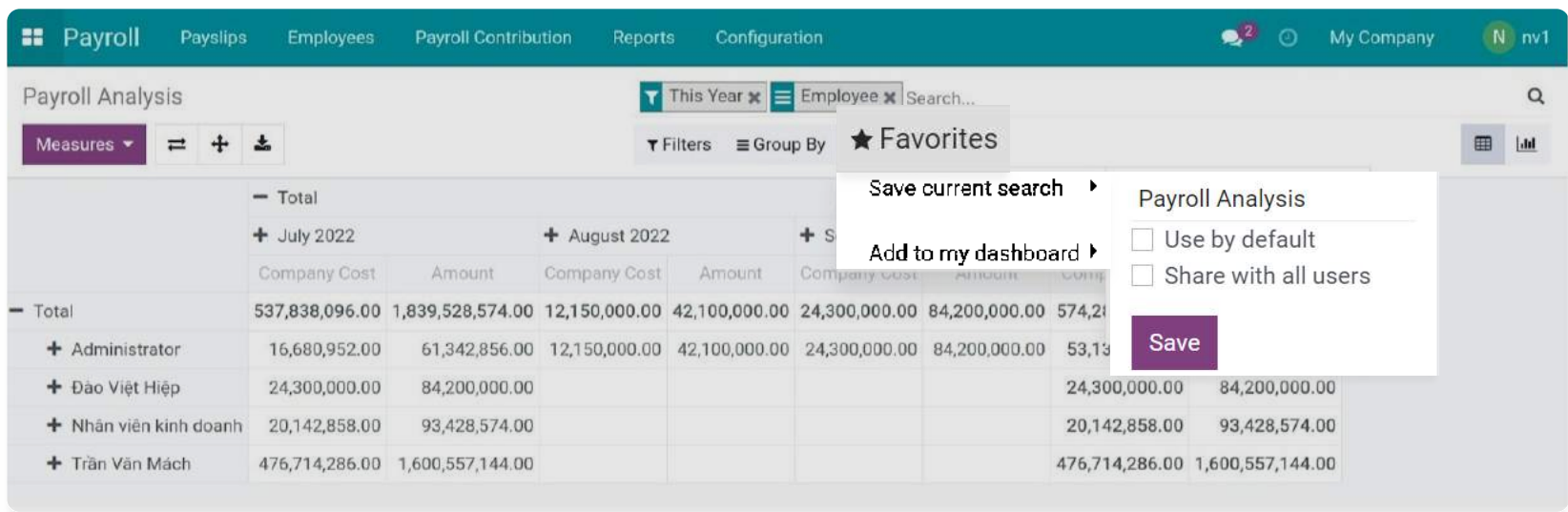


**Payroll Analysis report in pivot table:** Allows you to analyze two main measures: Company Cost and Amount:

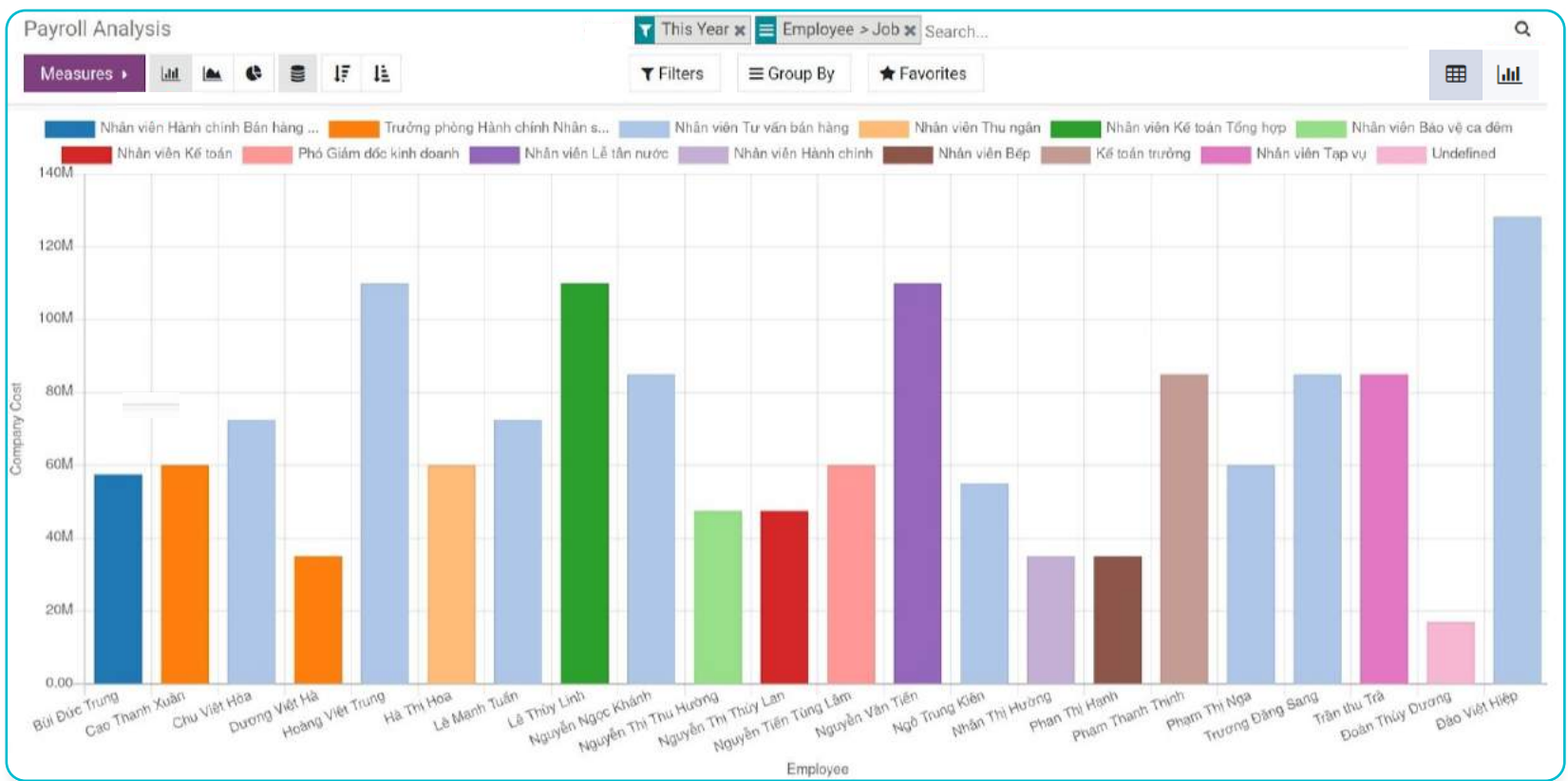
Select reporting criteria according to purpose by using [filters or group by](#) tools. You can group by employees to view salary costs reports for each employee, or group by job positions to analyze salary costs for each job position, etc.



Save this report template using the Favorites filter to use them as default or share with all users in the system:



**Payroll Analysis report in graph:** Besides viewing pivot analysis reports, you can view report in graph:

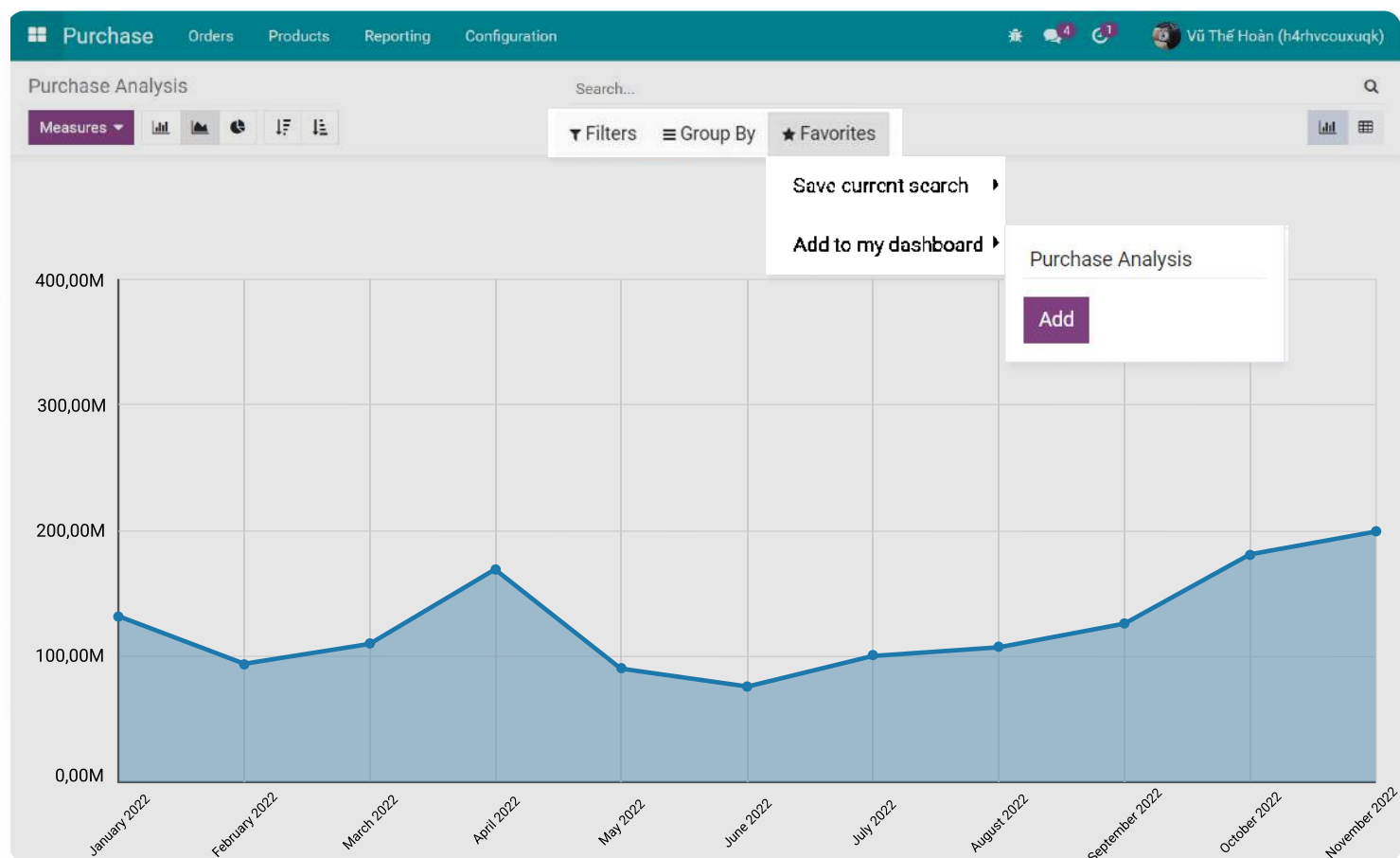




## BUILD YOUR DASHBOARDS

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

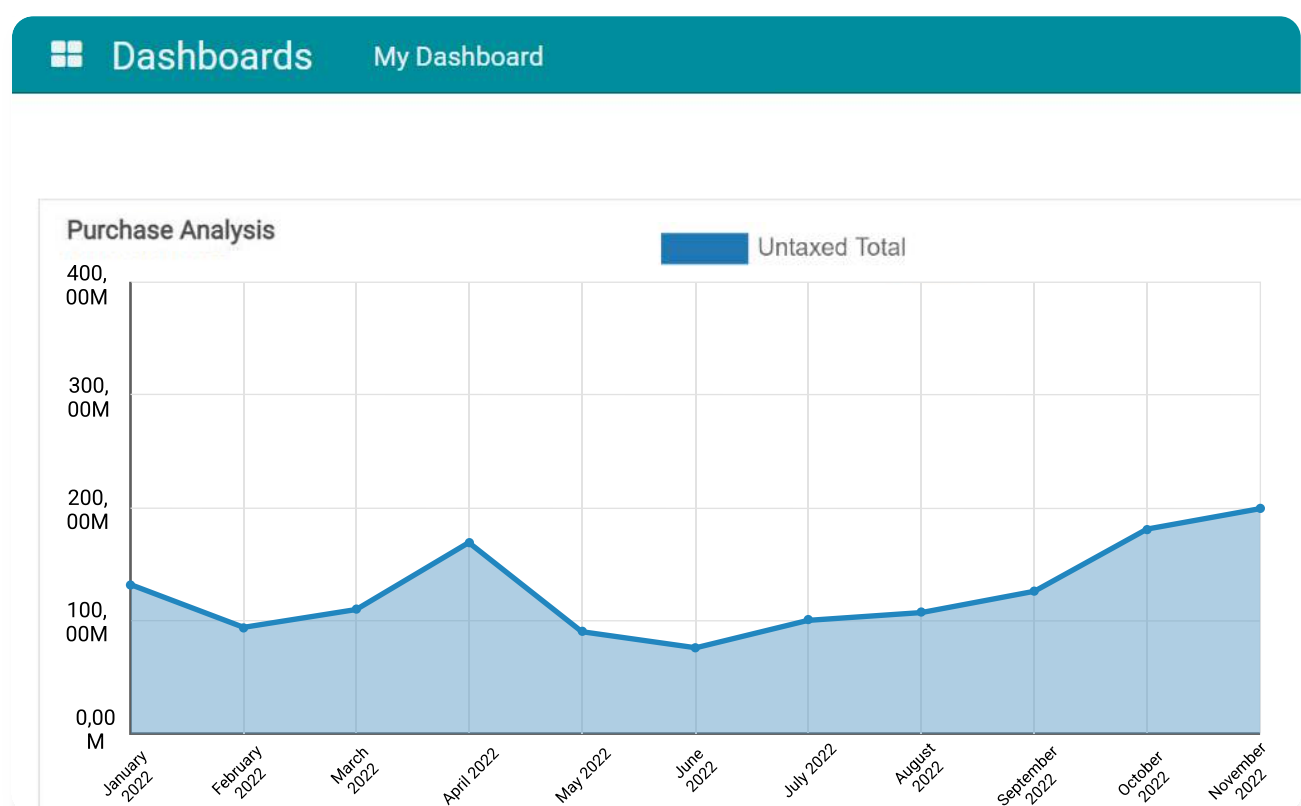
After filtering, and grouping the data to build a report according to the needed criteria, you select **Favorites** ▶ **Add to my dashboard**, give this report a name, and select **Add** to add it to your dashboard.



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



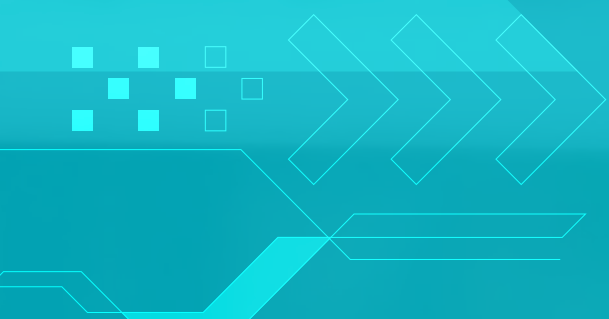
### Dashboards





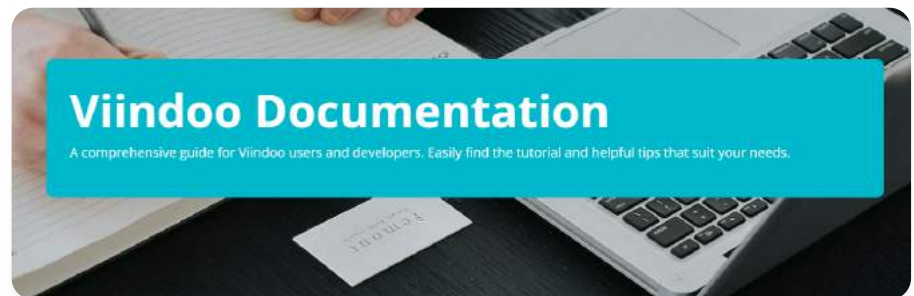


# GUIDELINES CONTACT SUPPORT



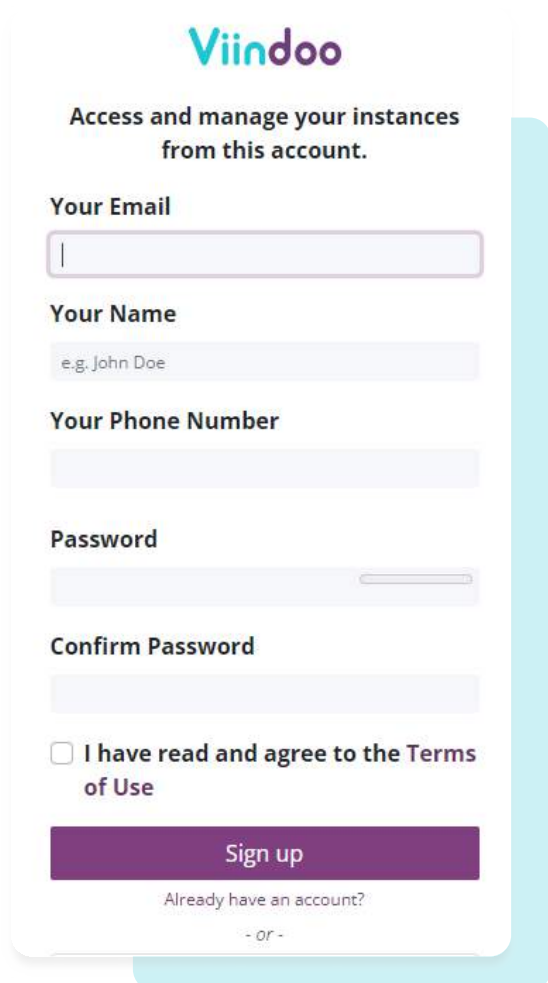
In case you encounter any difficulties while using Viindoo, you can contact the Viindoo Customer Support team as follows:

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



➔ See details at:

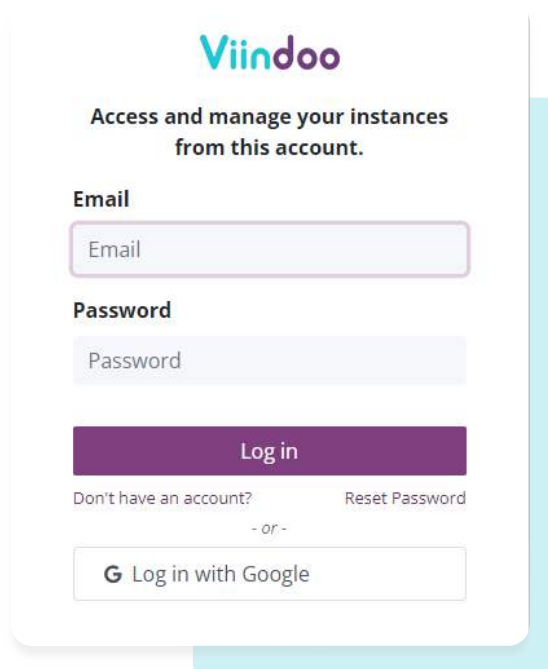
- [Forum](#).
- [User Documentation](#).

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

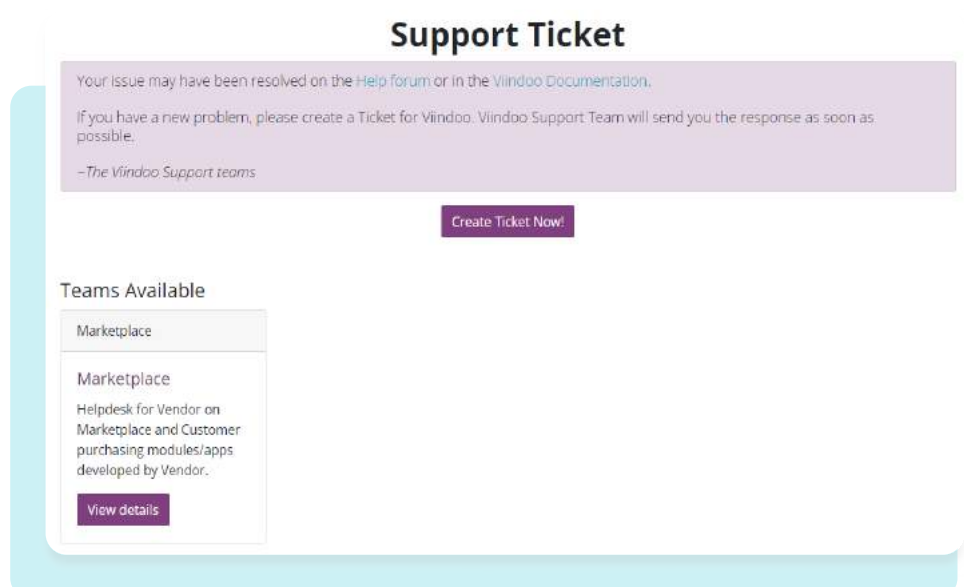
1

*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. The form is titled "Viindoo" and "Access and manage your instances from this account." It includes fields for "Email" and "Password". A purple "Log in" button is at the bottom. Below the button, it says "Don't have an account?" and "Reset Password". At the bottom, there is a button for "Log in with Google".

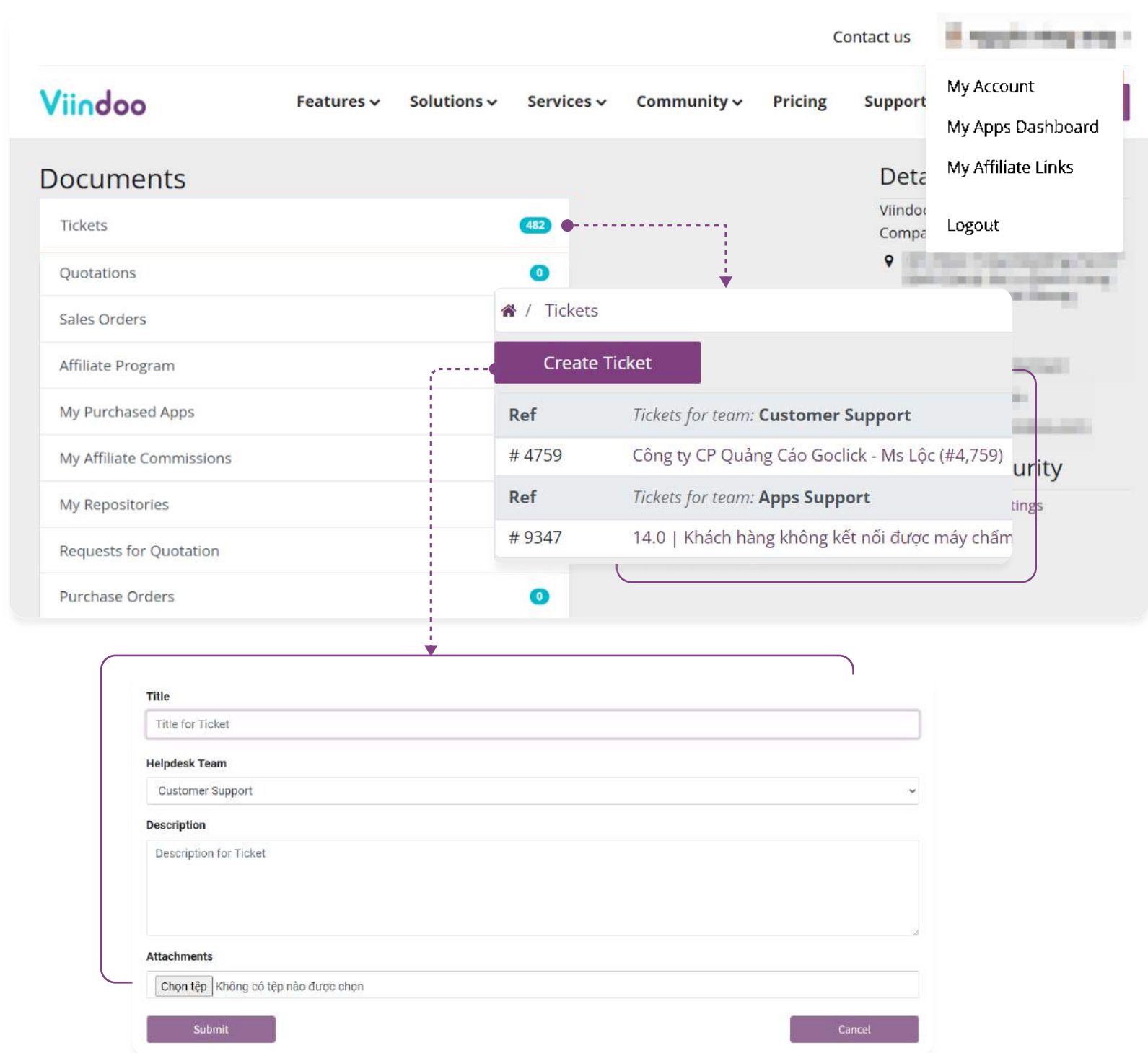
2

A screenshot of the Viindoo Support Ticket form. The form is titled "Support Ticket". It includes 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". A purple "Create Ticket Now!" button is at the bottom. Below the button, there is a section titled "Teams Available" with a list of teams: "Marketplace" and "Marketplace Helpdesk for Vendor on Marketplace and Customer purchasing modules/apps developed by Vendor." A "View details" button is next to the second team.

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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