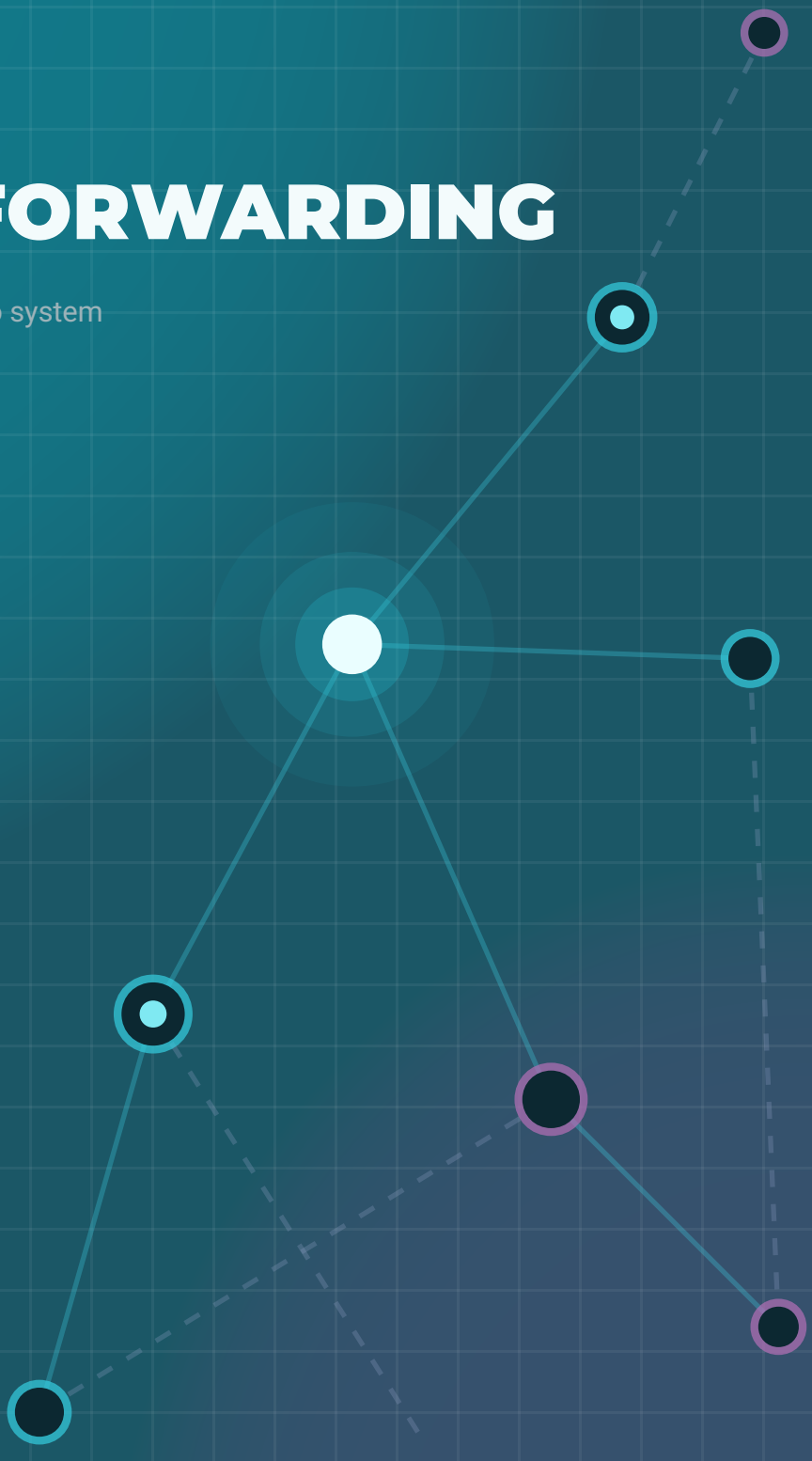
Viindoo

EBOOK · DEMO HANDBOOK

FREIGHT FORWARDING

13 hands-on lessons on the demo system



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BEFORE YOU START

The most important rule: you create your own shipment

Many people use this demo at the same time. For that reason the handbook **never tells you to open an existing shipment and edit it** - doing so would trample on what someone else is looking at.

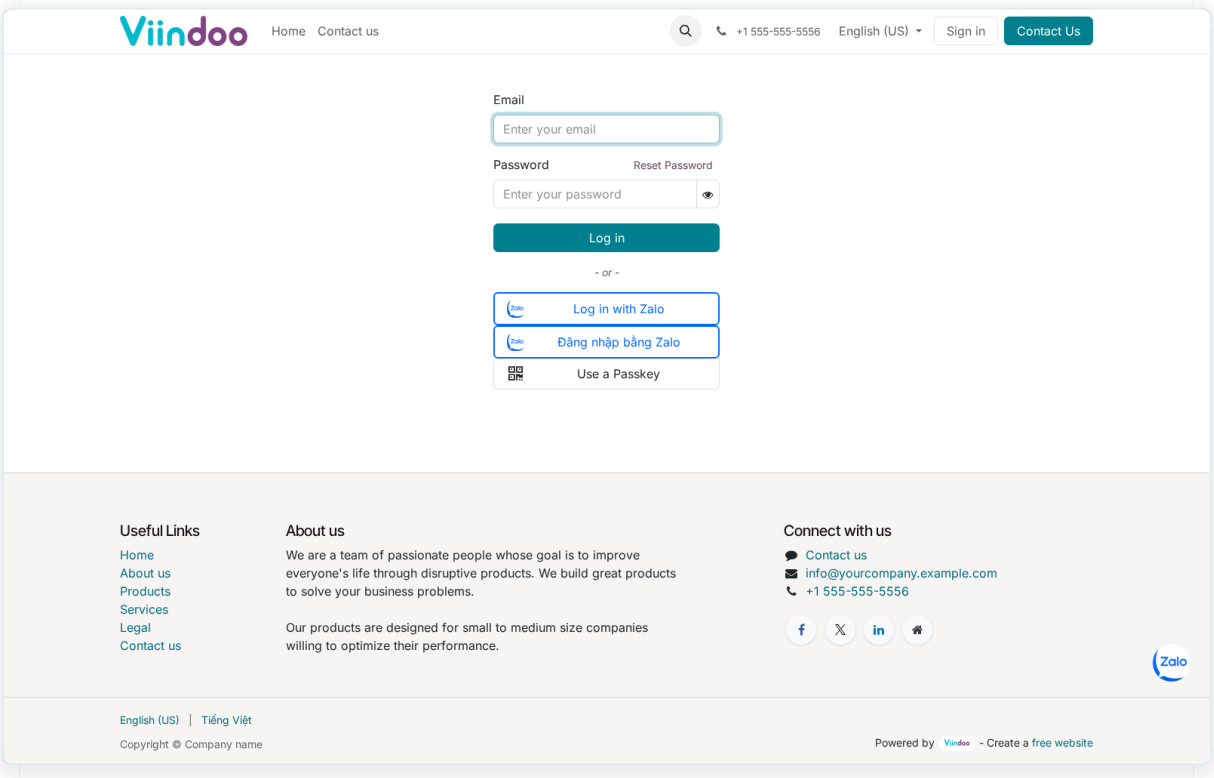
Instead, every hands-on lesson starts by **creating a new shipment**, then clicking one button to load sample data. The shipment you create belongs to you alone, and you can do anything you like with it. Lessons that only look at reports create nothing.

This works thanks to a built-in feature of the software, not a trick: the **shipment scenario template**. Lesson 12 shows you how to build your own template.

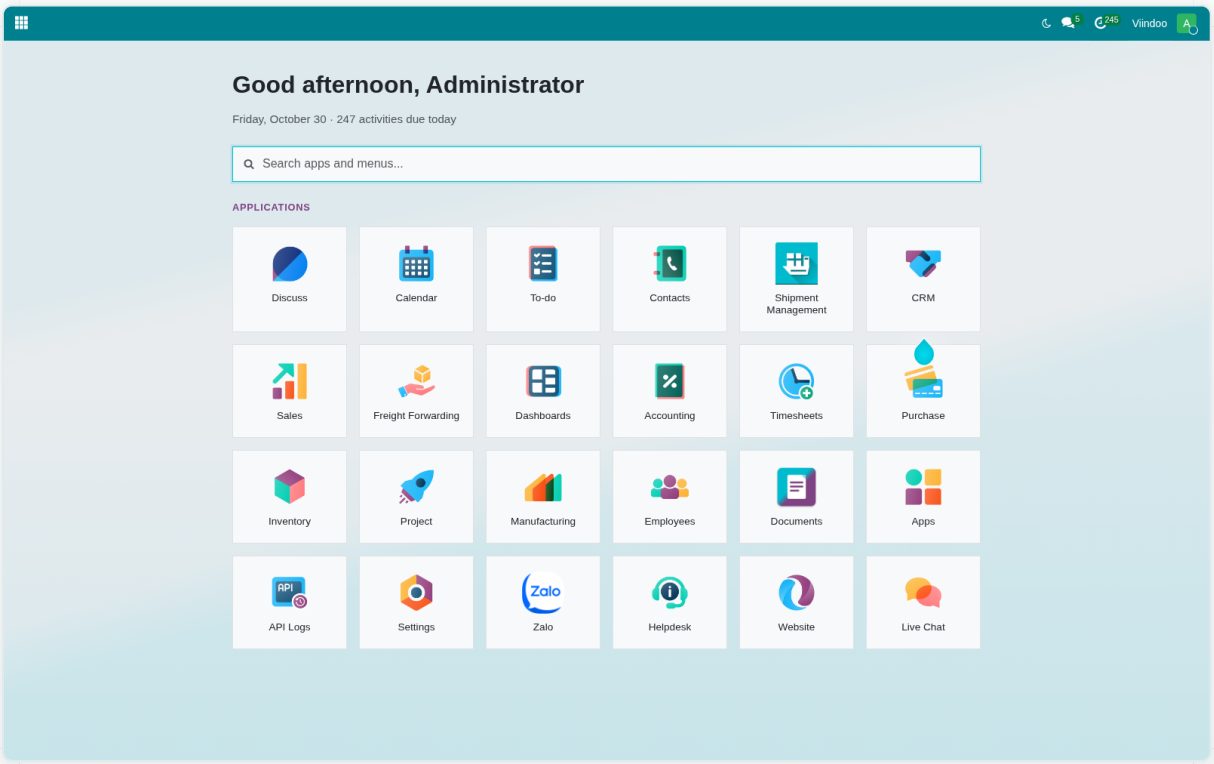
> **About the screenshots:** the images were taken on records that already exist on the demo system, so record numbers, dates and counts in them will differ from the shipment you create. Wherever an image differs in a way that matters, the text next to it says so. The figures in the text describe what you should see on your own record.

Step 0 - Log in

Open https://v19-freight-demo.viindoo.cloud, enter `admin` / `admin`, and click **Log in**.



What you will see: the home screen with the application tiles.



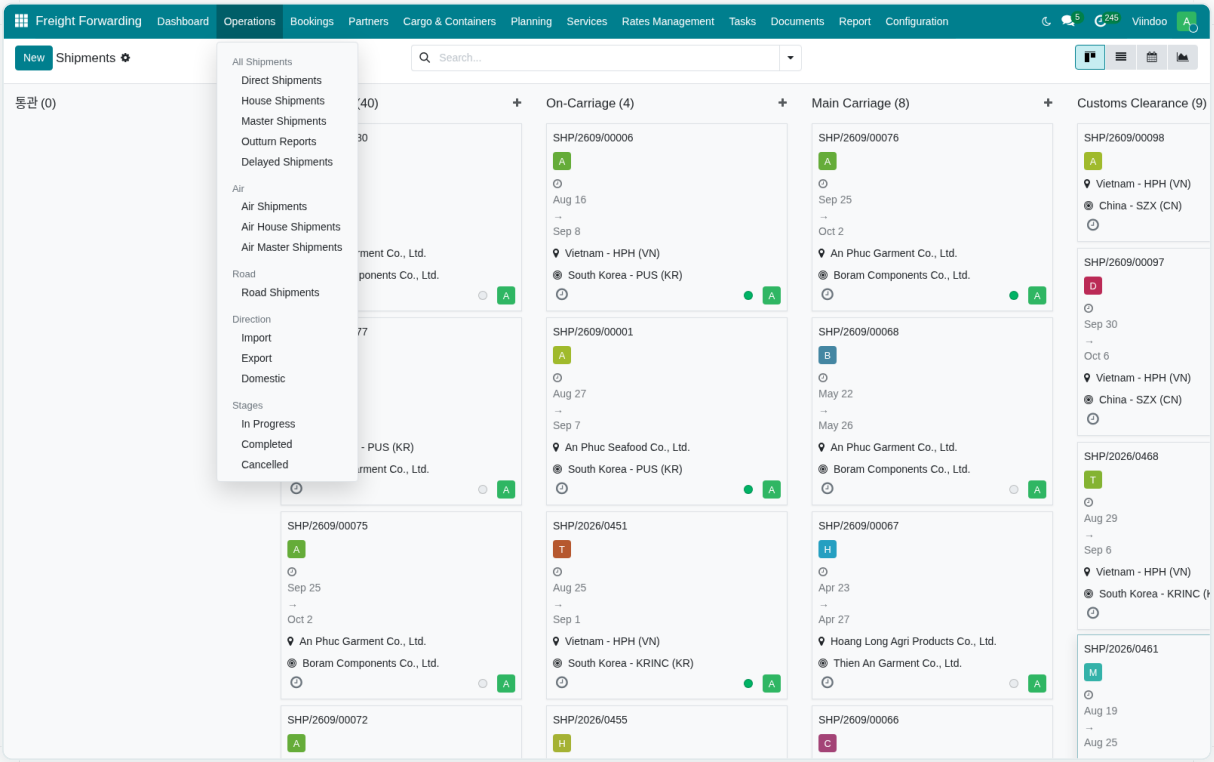
> The system may open in Vietnamese. To change the display language, click your user name in the top right corner, choose **My Preferences**, and change **Language**.

Two freight menus - which one to use

The top menu bar has **two** entries for freight forwarding:

Menu	Contents
Freight Forwarding	the most complete: Dashboard, Operations, Bookings, Partners, Cargo & Containers, Planning, Services, Rates Management, Tasks, Documents, Report, Configuration
Shipment Management	more compact: only Operations, Cargo & Containers, Report, Configuration - no Bookings, Documents, Tasks or Dashboard

This handbook uses `Freight Forwarding` because it has everything we need to teach, except a few reports and lists that exist only in `Shipment Management` (the handbook says so at each such place).



> The two menus overlap in functionality. Having two entry points has no effect on the data.

Frequently used paths

What you need	Path
List of shipments	`Freight Forwarding > Operations > All Shipments`
Booking forms	`Freight Forwarding > Bookings > All Bookings > Carrier Bookings`
Container equipment	`Freight Forwarding > Cargo & Containers > Containers`
Cargo	`Freight Forwarding > Cargo & Containers > Cargo`
Documents	`Freight Forwarding > Documents > Shipment Documents`
Operational tasks	`Freight Forwarding > Tasks > Shipment Tasks`
Profit and loss per shipment	`Shipment Management > Report > Shipment Statistics > Shipment Profitability`
Dashboard	`Freight Forwarding > Dashboard`

Fifteen ready-made templates

Find them at `Shipment Management > Configuration > Other > Shipment Templates`.

Four templates have Vietnamese names and are used by the lessons in this handbook:

Template	Used in lesson
MẪU - FCL xuất khẩu đường biển (Hải Phòng - Busan) (FCL sea export template)	Lessons 1, 2, 3, 4, 5, 9
MẪU - LCL nhập khẩu gom hàng (Busan - Hải Phòng) (LCL import consolidation template)	Lesson 6 (the direct LCL part)
MẪU - Hàng không xuất khẩu (Nội Bài - Incheon) (air export template)	Lesson 7
MẪU - Đường bộ qua cửa khẩu (cross-border road template)	Lesson 8

The other eleven templates carry the prefix `TPL-` and are the product's own templates, covering FCL routes, LCL master and house shipments, air freight in both directions, and road FTL and LTL. The `TPL-` templates have four stages or fewer and no tasks; the four Vietnamese-named templates above come with the full six stages and their tasks.

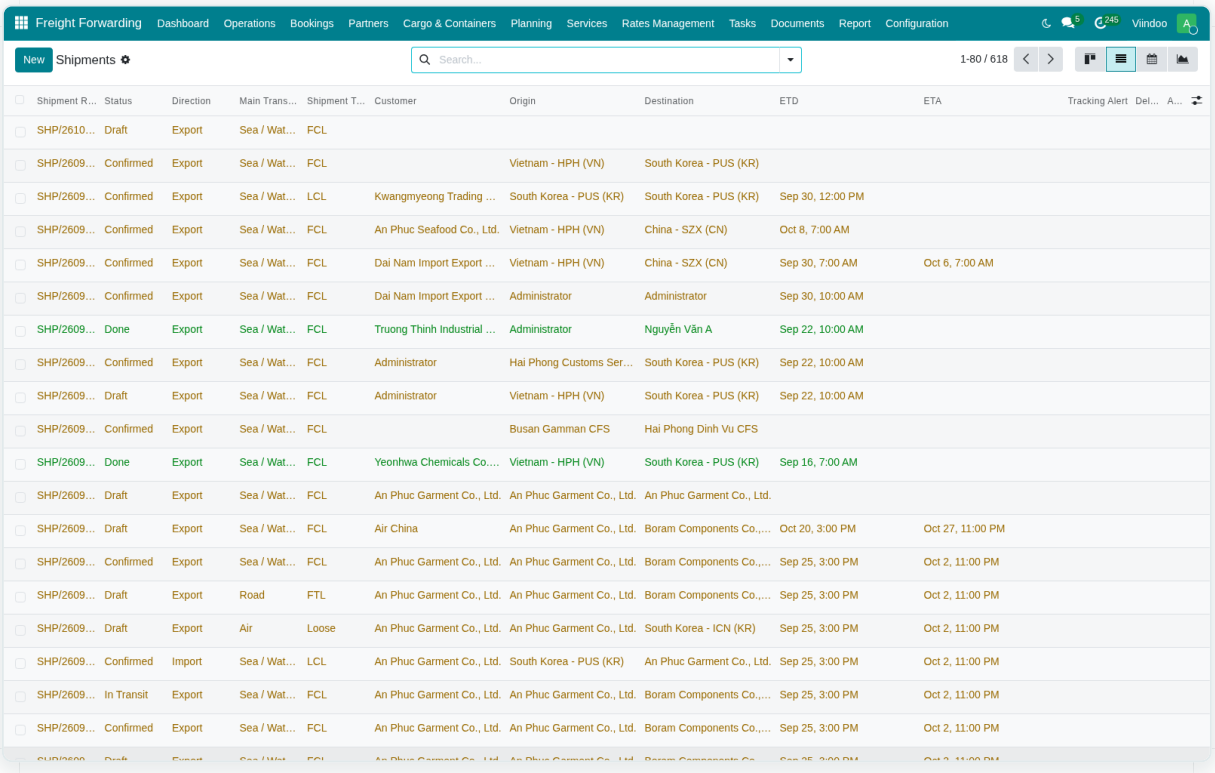
Each template carries: the charge lines, the workflow steps, the route legs and (for the four Vietnamese-named templates) the list of operational tasks. **Note when you apply a template to a new shipment:** the selling price of each charge line is copied across, while **Cost Price** and **Vendor** are left blank - fill them in yourself when you want to see profit and loss or create a vendor bill (see Lesson 9, Step 2).

01 RUN A FULL-CONTAINER EXPORT SHIPMENT FROM START TO FINISH

About 20 minutes. By the end of this lesson you will have gone through the whole life of a shipment, from the moment the request comes in to the moment delivery is finished.

Step 1 - Open the shipment list

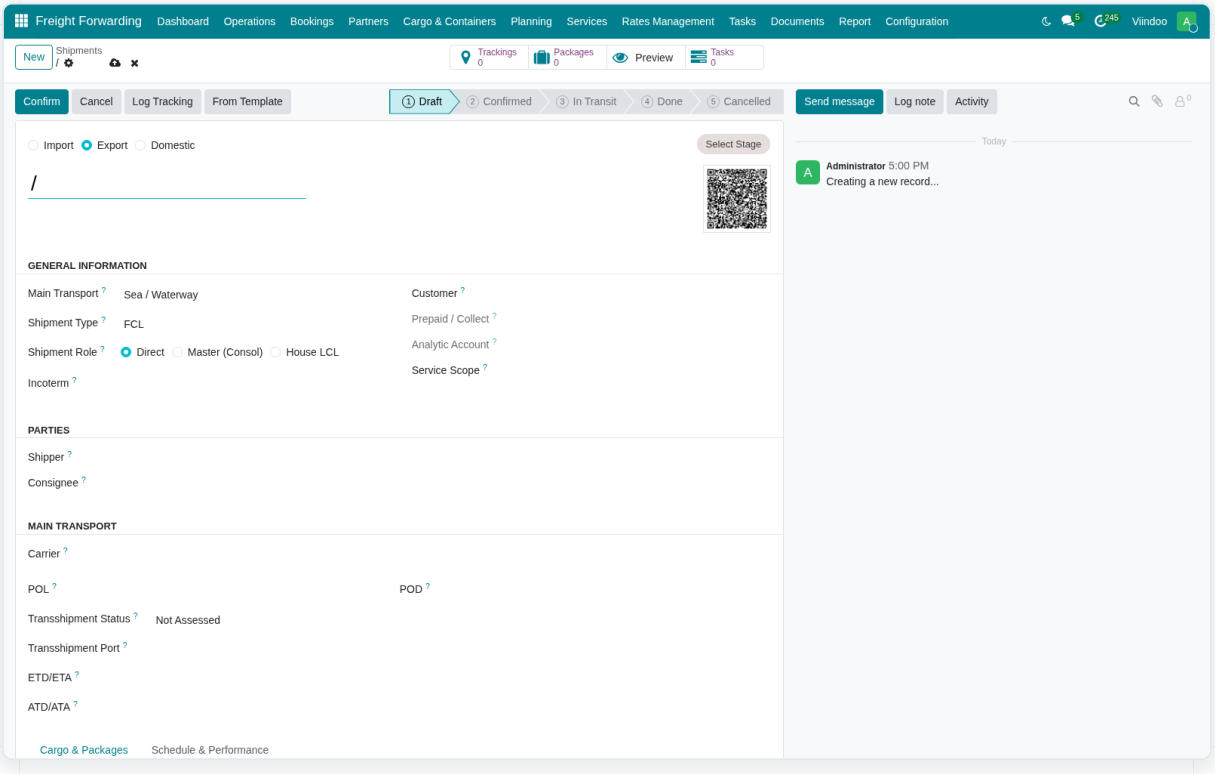
Go to `Freight Forwarding > Operations > All Shipments`.



You should see: a list of more than six hundred shipments, one per row, with the columns **Shipment Reference**, **Status**, **Direction**, **Main Transport**, **Shipment Type**, **Customer**, **Origin**, **Destination**, **ETD**, **ETA**. Click the **Shipment Reference** column header twice to bring the newest shipment to the top.

Step 2 - Create a new shipment

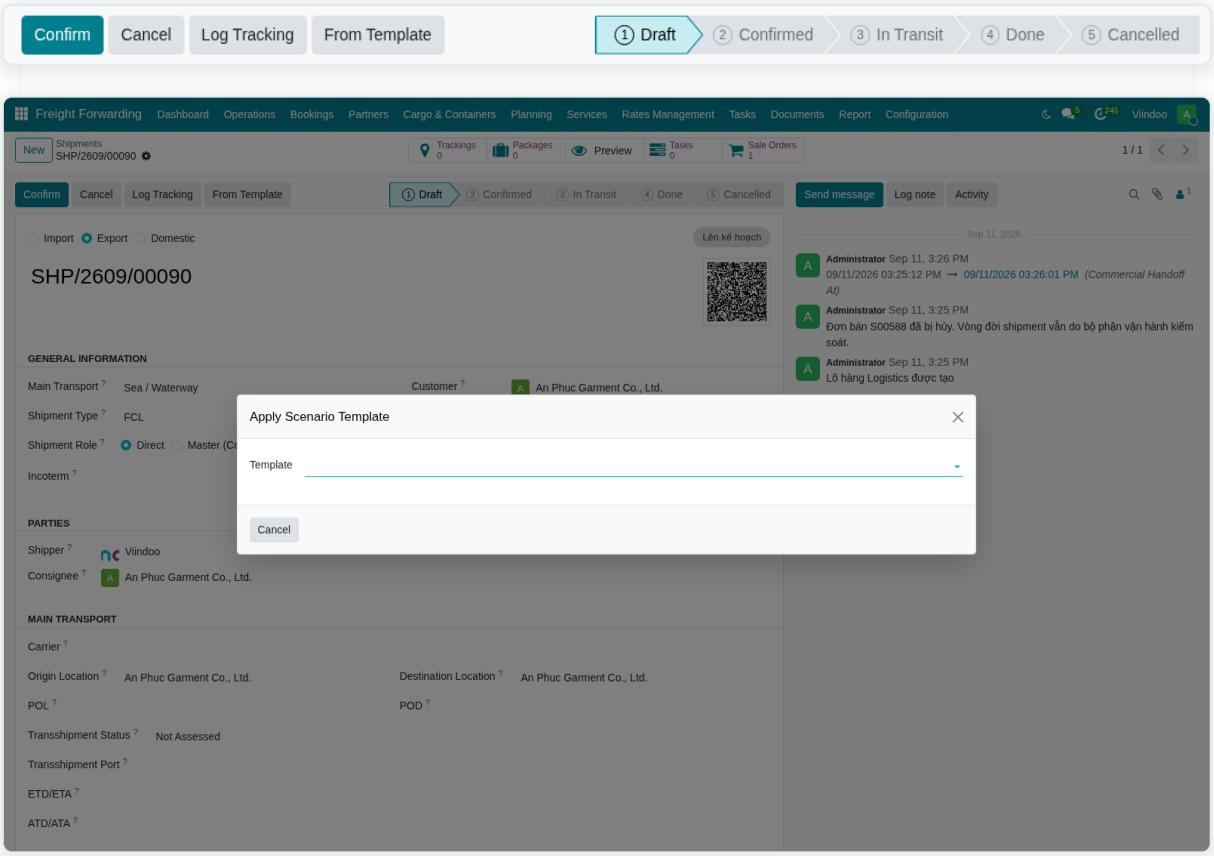
Click the **New** button in the top left corner.



You should see: an empty record with the status **Draft**, and a button bar containing **Confirm**, **Cancel**, **Log Tracking** and **From Template**. You do not need to fill in anything yet.

Step 3 - Load the template

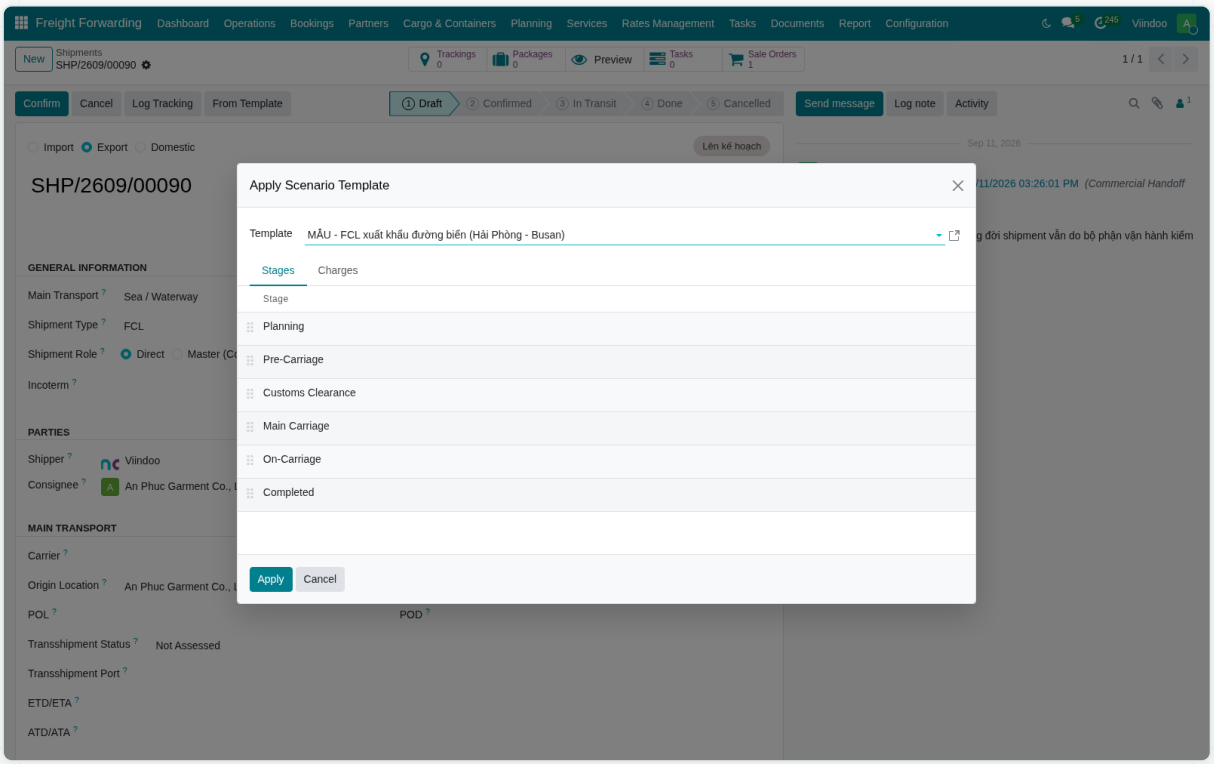
Click **From Template** on the button bar at the top.



You should see: the **Apply Scenario Template** dialog opens with exactly one field - **Template** - still empty. There is nothing to preview yet.

Step 4 - Choose the template and preview it

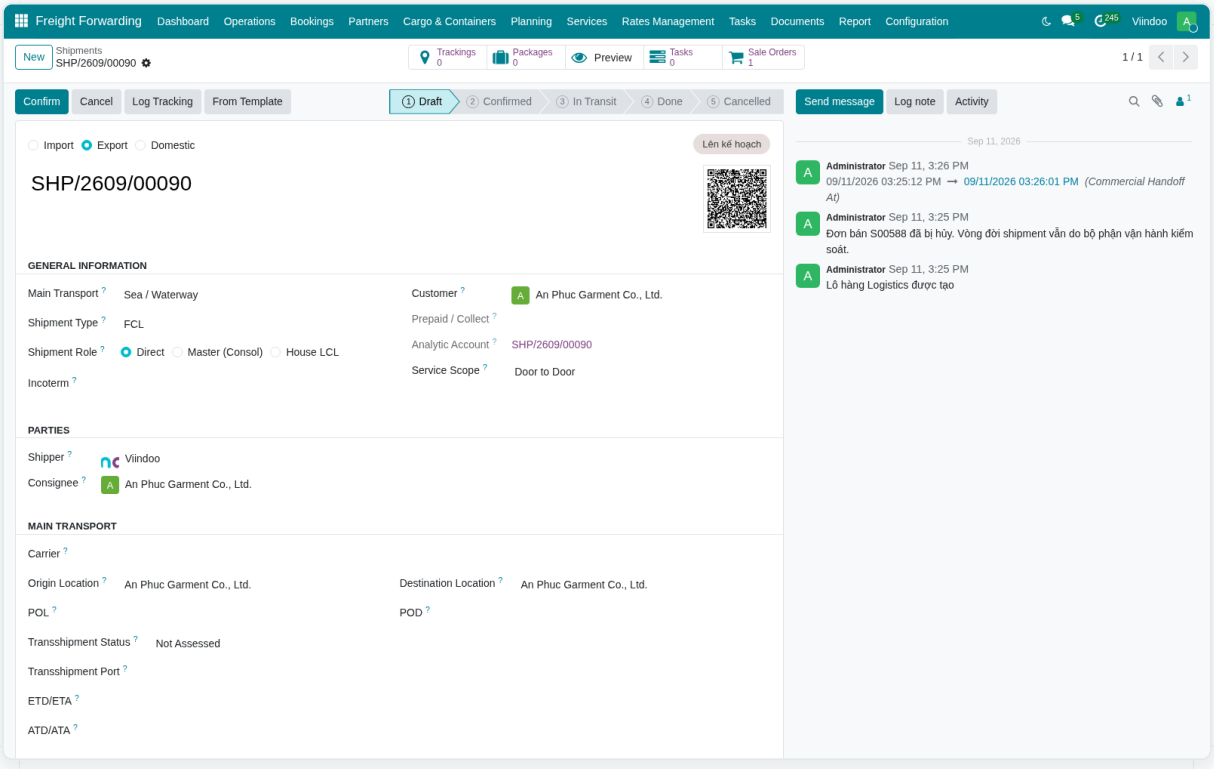
In the **Template** field, choose **MẪU - FCL xuất khẩu đường biển (Hải Phòng - Busan)** (the FCL sea export template for Hải Phòng - Busan).



You should see: as soon as you choose, the dialog **widens** and grows two preview tabs - **Stages** (the six workflow steps, open by default) and **Charges** (the charge lines, click across to see them). The two middle steps have English names on screen: **Pre-Carriage** (the leg before the main voyage) and **On-Carriage** (the leg after it). This is what will be copied into your shipment.

Step 5 - Apply the template

Click **Apply**.



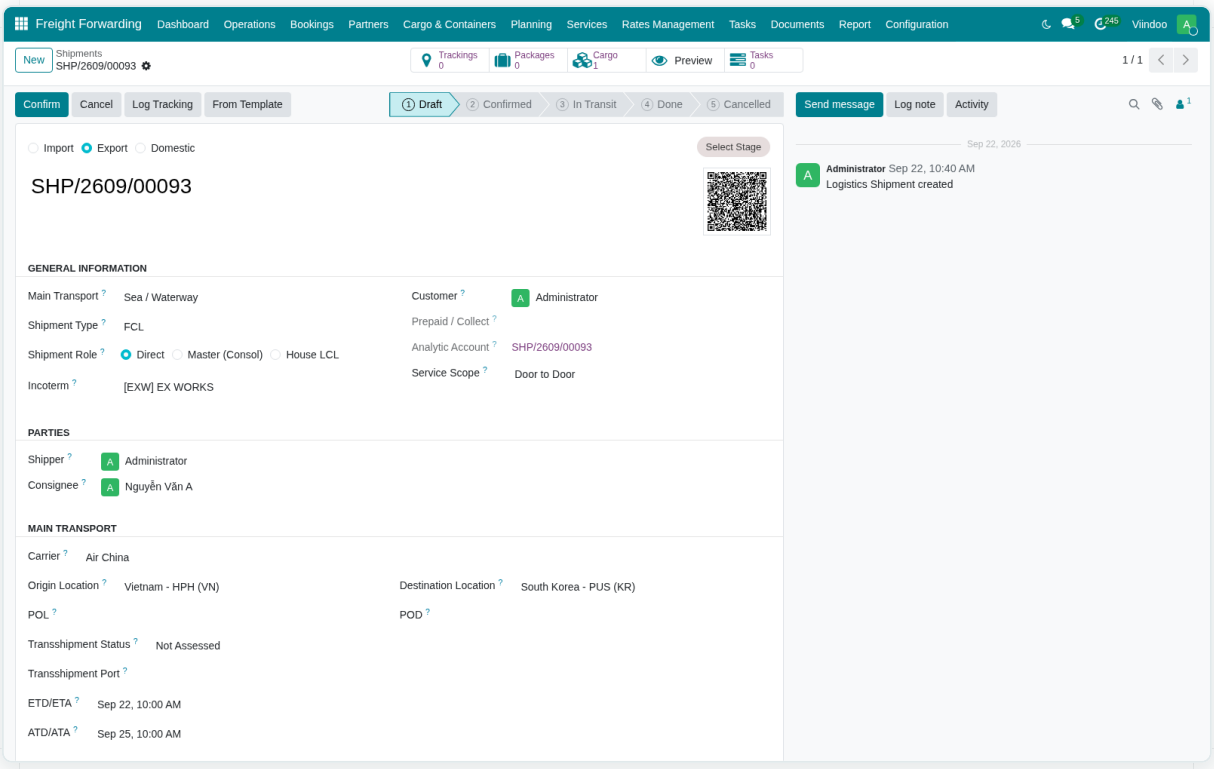
You should see: the empty shipment from a moment ago now has six charge lines, six workflow steps, three route legs linking Hải Phòng and Busan, the shipment type automatically set to **FCL**, and 11 operational tasks (the **Tasks** stat button at the top of the record). The **Cost Price** and **Vendor** columns of the charge lines are still blank - Step 9 will fill them in. The screenshot shows the top of a draft shipment before any template content was loaded, so its **Tasks** button shows 0; yours will show the tasks.

> **Why this matters:** a forwarder runs the same few dozen fixed routes again and again. Building a template for each route and then copying it is how the trade really works, not a decorative feature.

Step 6 - Fill in the shipment details

Fill in the main fields at the top of the record:

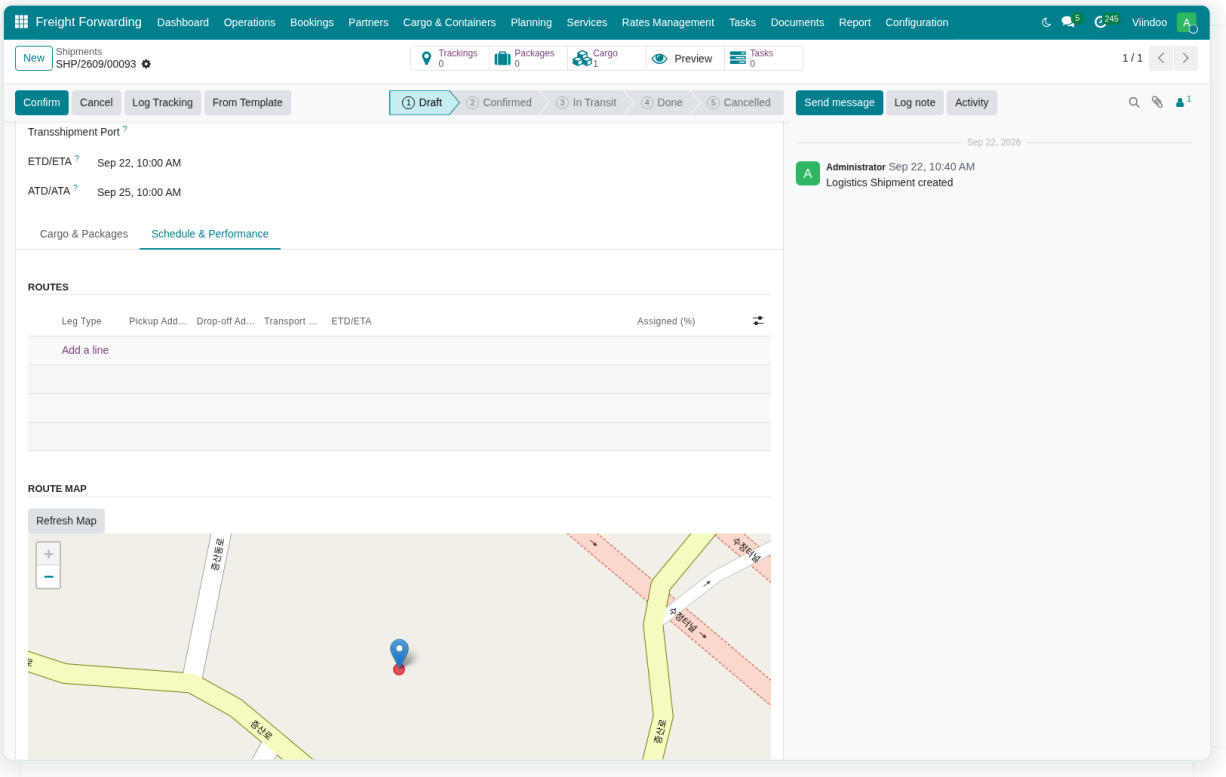
Field	What to enter
Customer	pick any company in the list
Shipper	usually the customer itself, for an export
Consignee	a foreign company
Carrier	pick a shipping line
Incoterm	a delivery term, for example CFR - it is required by the booking wizard (Step 9), so fill it in now
ETD/ETA	click the field, choose a departure date and an arrival date in the future, then click **Apply**



You should see: the fields now hold values, and a **Save** button (cloud icon) appears at the top. Click **Save**.

Step 7 - Look at the schedule and the legs

Open the **Schedule & Performance** tab.

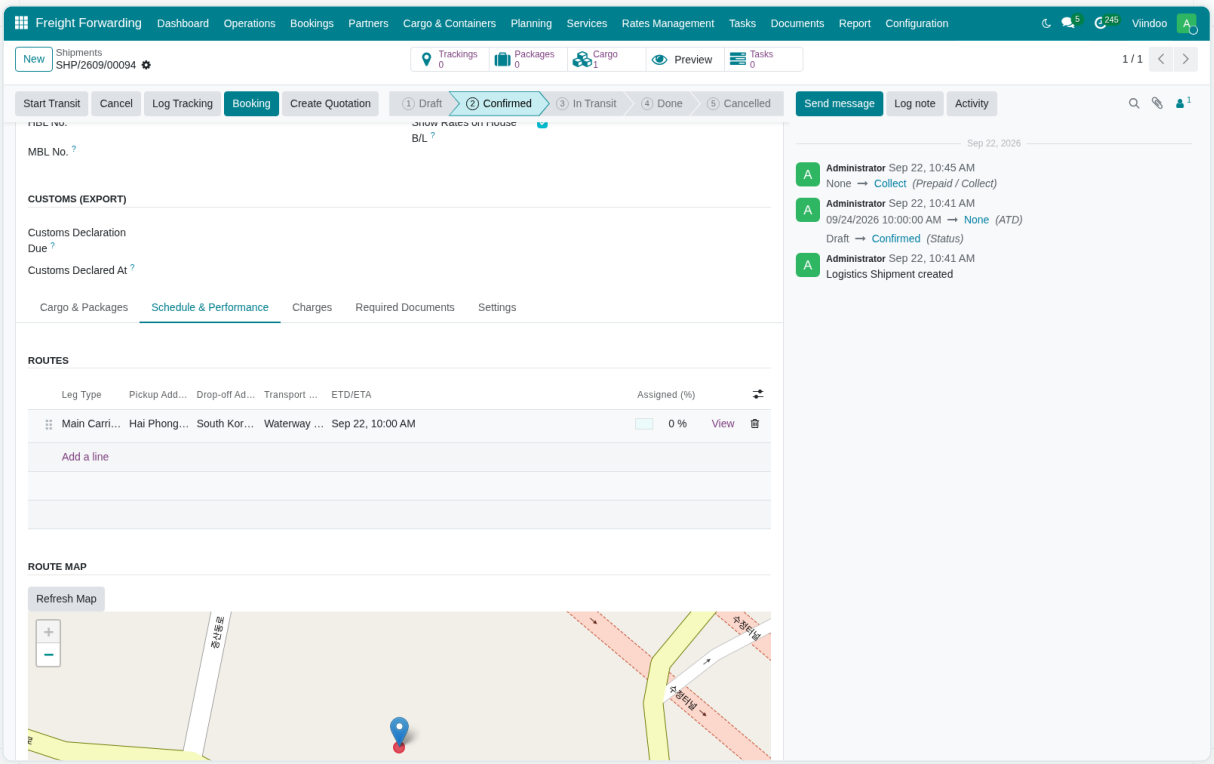


You should see: the **Routes** table with the three legs the template built - **Pre-Carriage** (pickup), **Main Carriage** (sea) and **On-Carriage** (delivery) - each with a pickup address, a delivery address, a transport mode and an **ETD/ETA** column; below it is the **Route Map** (with the **Refresh Map** button). The actual departure and arrival dates (**ATD/ATA**) of the whole shipment sit at the top of the record and are only filled in while the shipment runs (Step 11 and Step 15); the leg table has no actual-date columns yet. The screenshot shows a shipment whose legs have not been loaded, so the leg table is empty; on your shipment it holds the three legs.

> **The cut-off deadlines are not here.** The SI, CY and VGM deadlines (**SI Cutoff**, **CY Cutoff**, **VGM Cutoff**) are entered on the **booking form**, not on the shipment record - because they are conditions the shipping line sets when it grants space. Lesson 2 goes into this, and it is also where you will meet the software's most notable time barrier.

Step 8 - Confirm the shipment

Click **Confirm**.



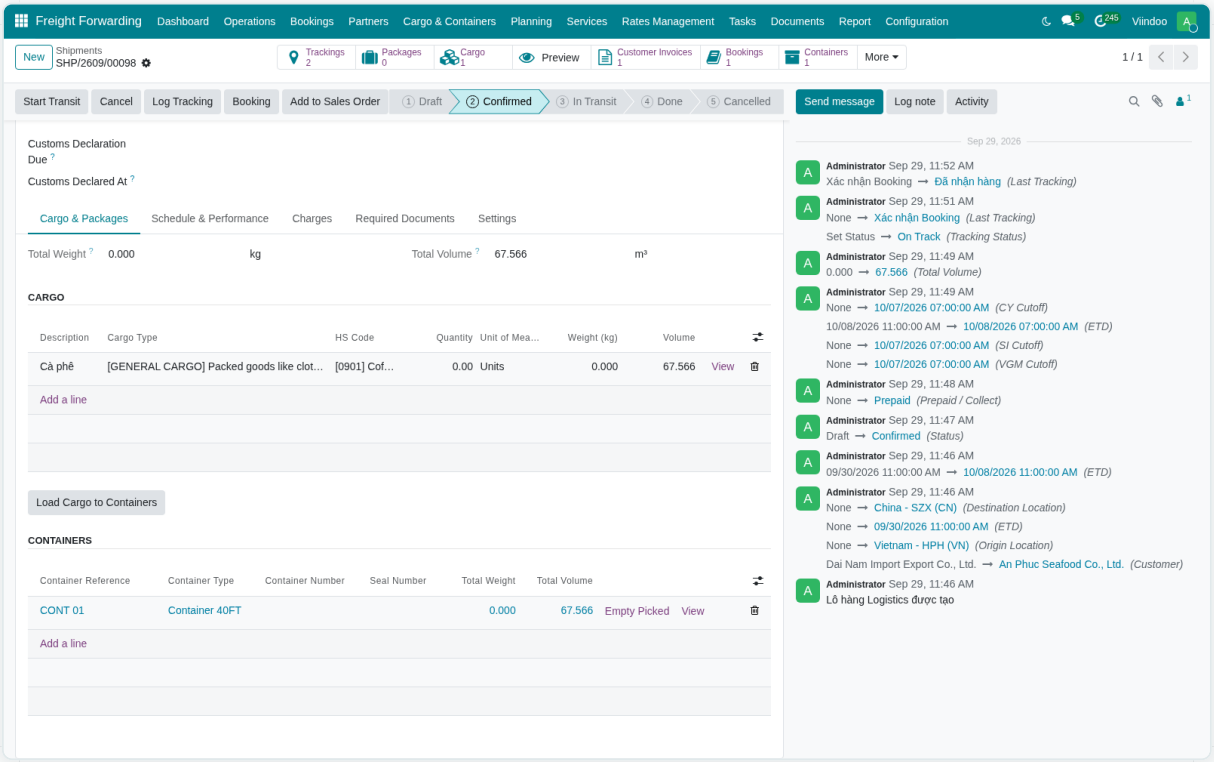
You should see: the status bar moves to **Confirmed**, the button bar gains **Booking** and **Start Transit** buttons, and the record gains the tabs **Charges**, **Required Documents** and **Settings**.

Step 9 - Enter the cost price and vendor for the charge lines

Open the **Charges** tab. For each line, choose a **Vendor** (for example the shipping line you picked) and enter a **Cost Price** - a suggested set of numbers is in Lesson 9, Step 2. Do this before looking at profit and loss or creating a vendor bill, because the template does not copy cost prices: left blank, the shipment's gross margin shows 100% and the vendor bill picks up the selling price by mistake. If you only want a quick pass through the shipment life cycle, skip this step.

Step 10 - Quick booking and entering the container

Click **Booking**, add a container line as in Lesson 2, Step 3, then click **Create**. Back on the shipment, open the **Cargo & Packages** tab: the **Containers** block appears only once the shipment has a container, and the container is created by the booking wizard. Click the **Container Number** and **Seal Number** cells of the container line to enter the container number and seal number, then click **Save**.



You should see: the container line (named **CONT 01**) with its **Container Number**, **Seal Number** and a group of action buttons on the line itself.

Step 11 - Run the container milestone chain

This is the part field staff click every day. On the container line, click in turn:

Empty Picked > Stuffed > Gate-in > Loaded



You should see: each click stamps a timestamp, the button you just clicked disappears and the next one appears in its place. After **Loaded**, the line has only the **View** button left.

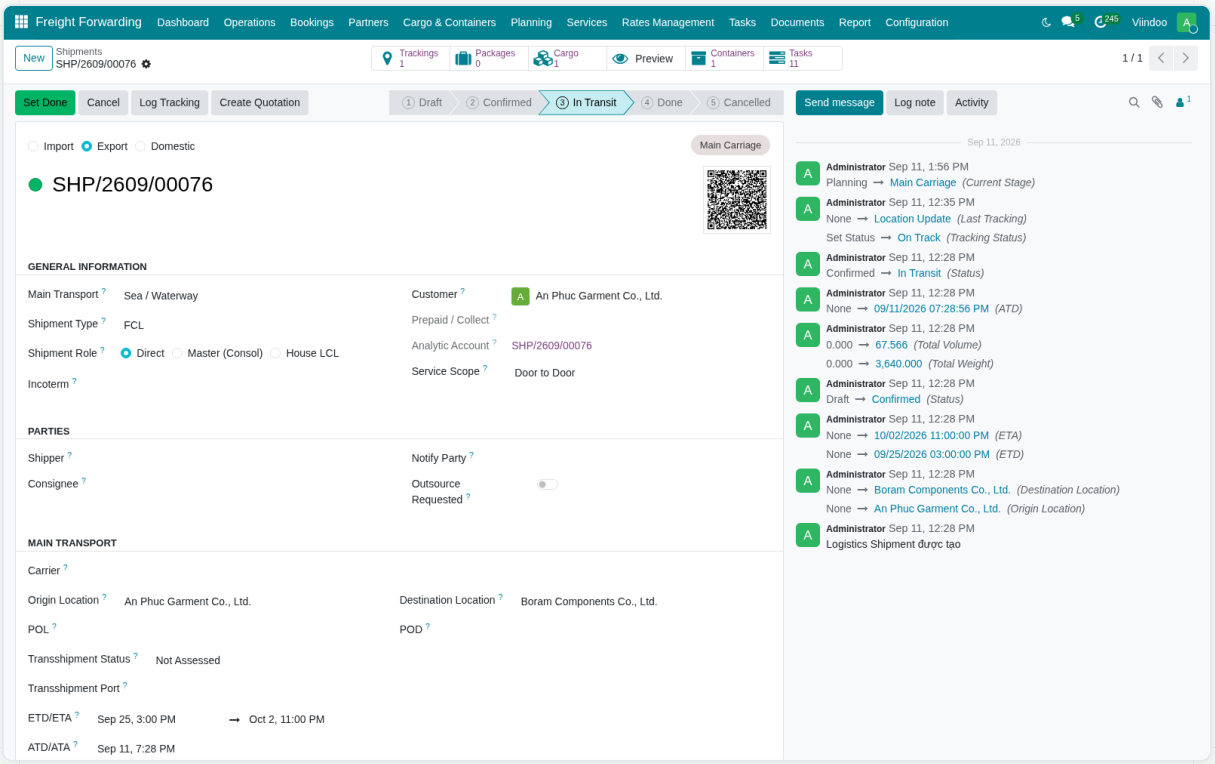
For an **import** shipment, the container line has a different chain of buttons:

Arrived > Customs Cleared > Gate Out > Unstuffed > Empty Returned

> **The rule of the milestone chain: stamp in the right order and never back-date.** The timestamps are the audit trail of the whole shipment.

Step 12 - Set the shipment running

Click **Start Transit**.

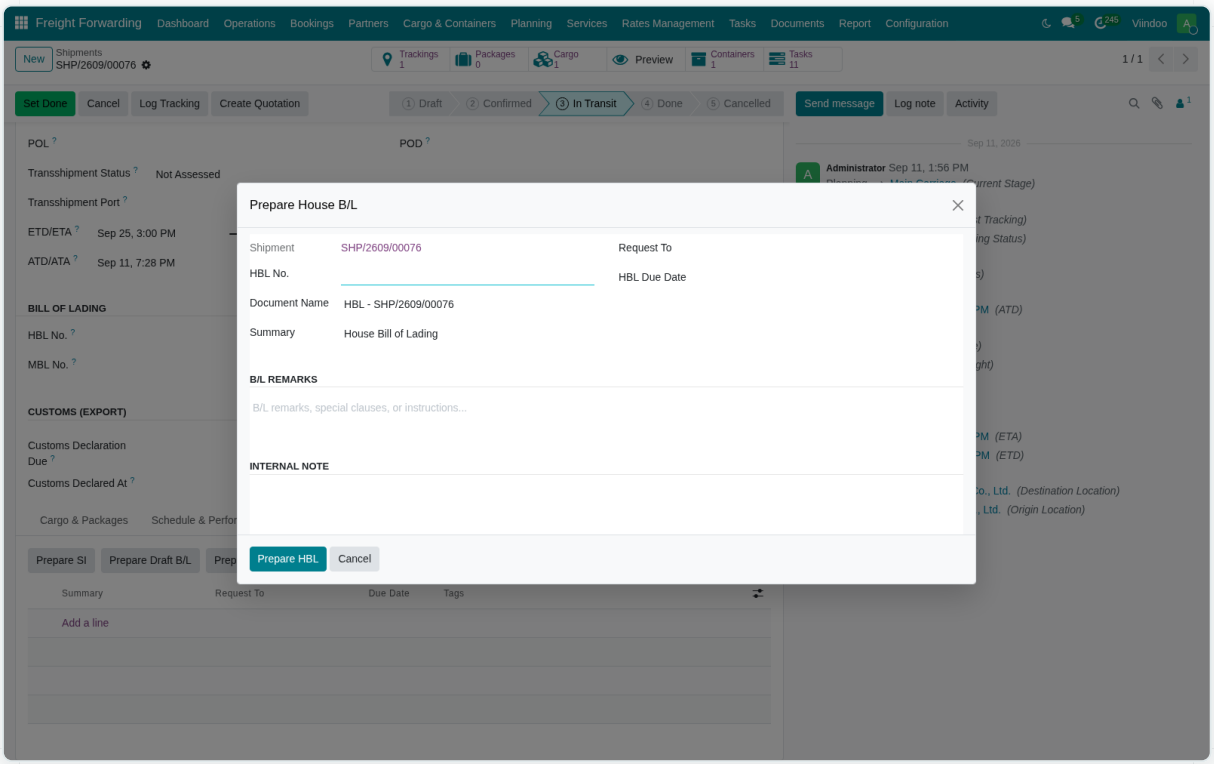


You should see: the status changes to **In Transit**, **ATD** (actual departure date) is recorded automatically, and the **Set Done** button appears.

Step 13 - Prepare documents

Open the **Required Documents** tab. Three document wizards live here, **not on the button bar at the top**: **Prepare SI**, **Prepare Draft B/L** and **Prepare HBL**.

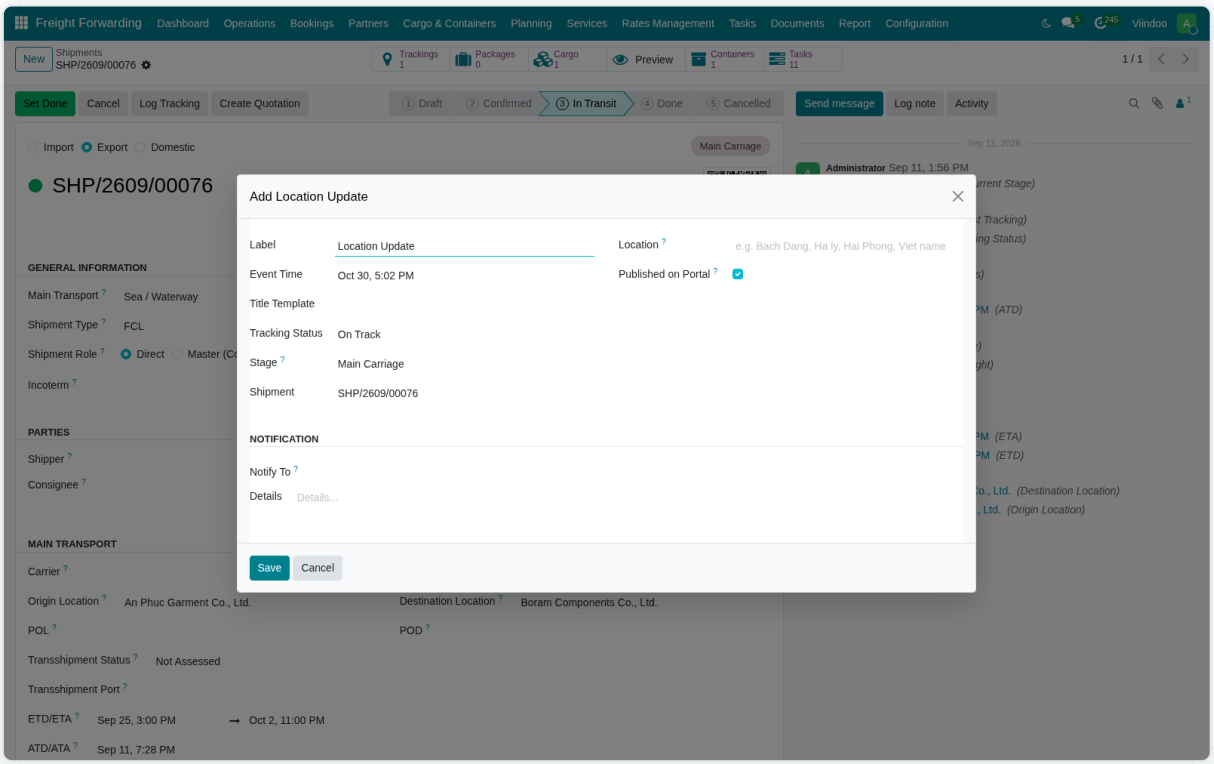
Click **Prepare HBL**.



You should see: the **Prepare House B/L** dialog with the shipment and the **Document Name** already filled in; you enter **HBL No.**, **Request To**, **HBL Due Date** and a note, then click **Prepare HBL** to create the document request for the shipment. Click **Cancel** if you only want to look.

Step 14 - Post a progress update the customer can see

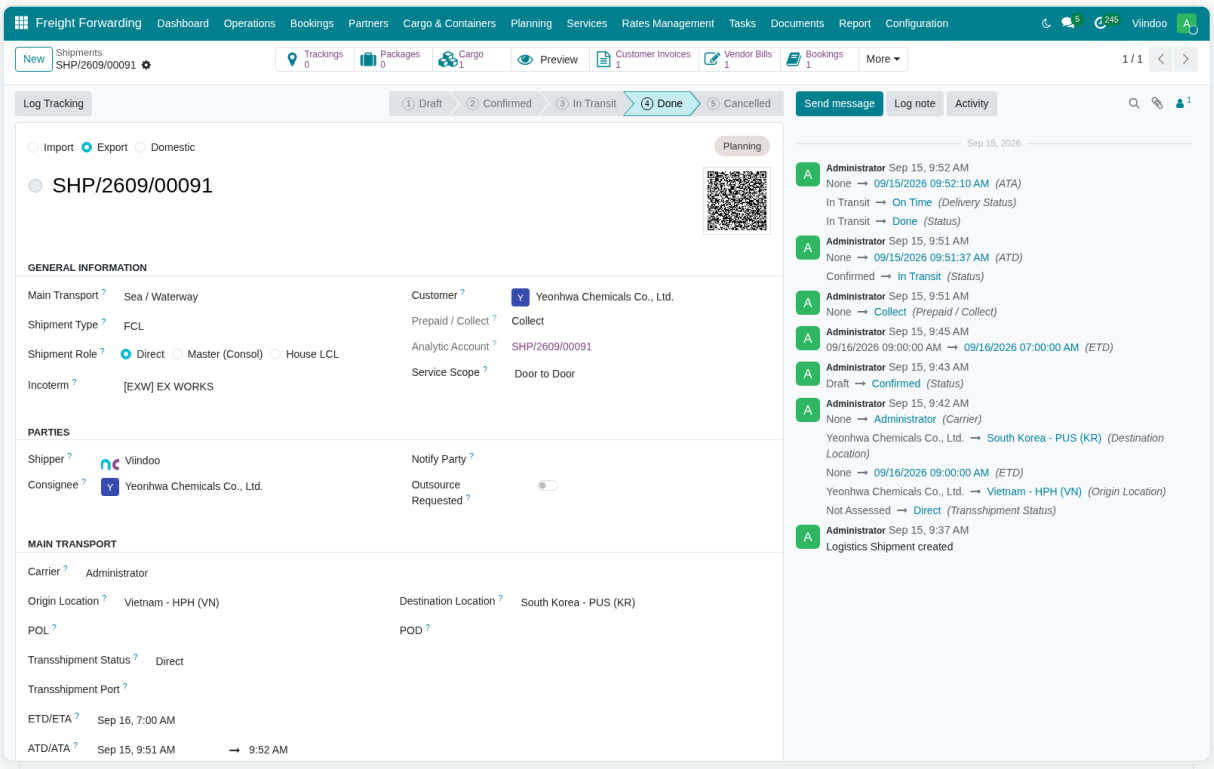
Click **Log Tracking**. The dialog is titled **Add Location Update**: in the **Title Template** field choose a milestone (for example **Departed**), enter the **Location**, then click **Save** (or **Send Update Email**, where the dialog offers it, to notify the customer as well; **Cancel** to leave).



You should see: the shipment's **Trackings** stat button goes up by 1; the milestone you just recorded sits in the shipment's journey history and can be used by the customer portal in Lesson 11.

Step 15 - Complete

Click **Set Done**.



You should see: ATA (actual arrival date) is recorded, the status changes to **Done**, and the status-change buttons disappear (leaving **Log Tracking**, as in the screenshot, and **Create Quotation** if no quotation exists yet).

> **Note:** a completed shipment **cannot be reopened**. The **Reset to Draft** button appears only for a **cancelled** shipment, not for a completed one. This is deliberate - completion is an event that has happened. If you want to try again, create a new shipment.

02 BOOKING WITH THE SHIPPING LINE

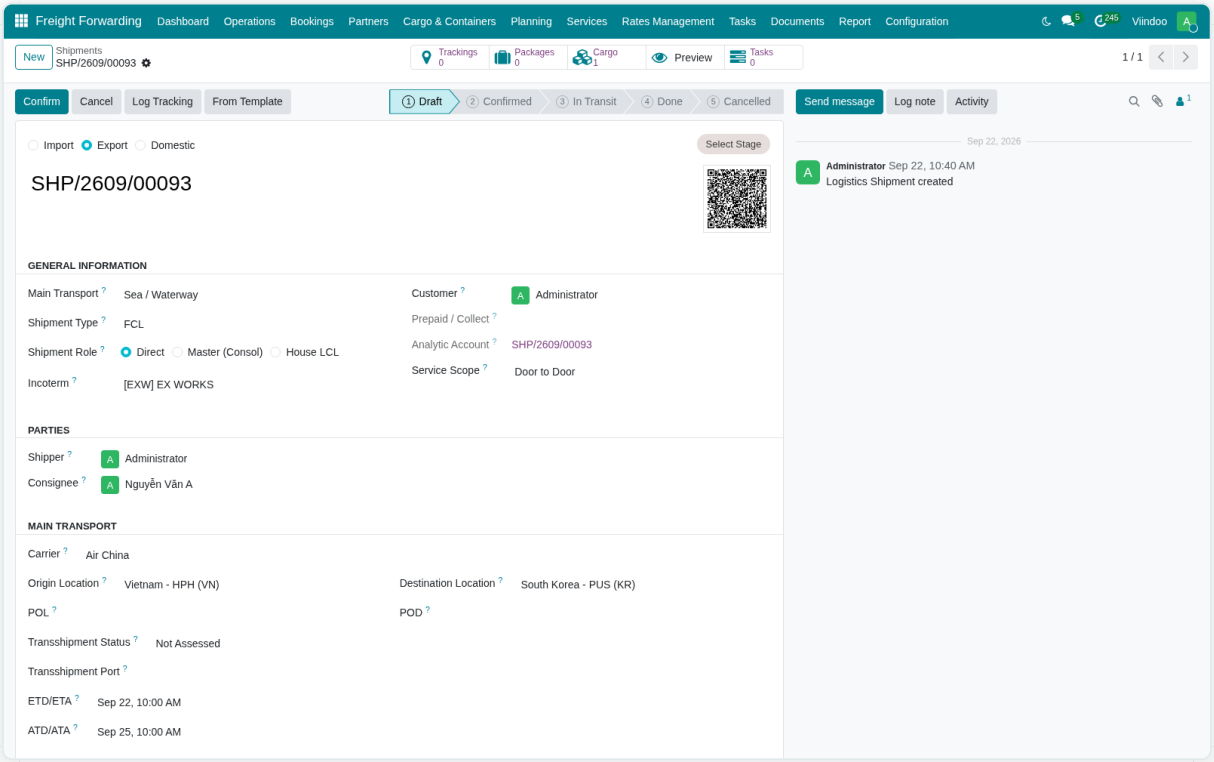
About 12 minutes. Booking is the first thing the operations team does once a shipment is settled. Viindoo keeps it as a separate record with its own life cycle, because one booking form can serve several shipments. This lesson starts with a brand-new shipment of your own, so you can repeat it as often as you like without depending on anyone else's booking.

Step 1 - Create a new shipment and apply the template

Go to `Freight Forwarding > Operations > All Shipments`, click **New**, click **From Template**, choose **MẪU - FCL xuất khẩu đường biển (Hải Phòng - Busan)**, and click **Apply**. These steps are the same as Step 2 to Step 5 of Lesson 1.

Then fill in these fields at the top of the record:

Field	What to enter
Customer	any company in the list
Shipper	usually the customer itself
Consignee	any company
Carrier	a shipping line
ETD/ETA	dates in the future
Incoterm	a delivery term, for example CFR

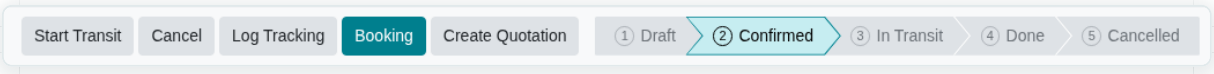


You should see: the shipment record in the **Draft** status, already holding the charge lines, legs and stages from the template.

> The **Incoterm** field is not required to save a shipment, but it is required by the booking wizard in Step 3. Fill it in from now on and the wizard will pick it up automatically.

Step 2 - Confirm the shipment

Click **Confirm**.

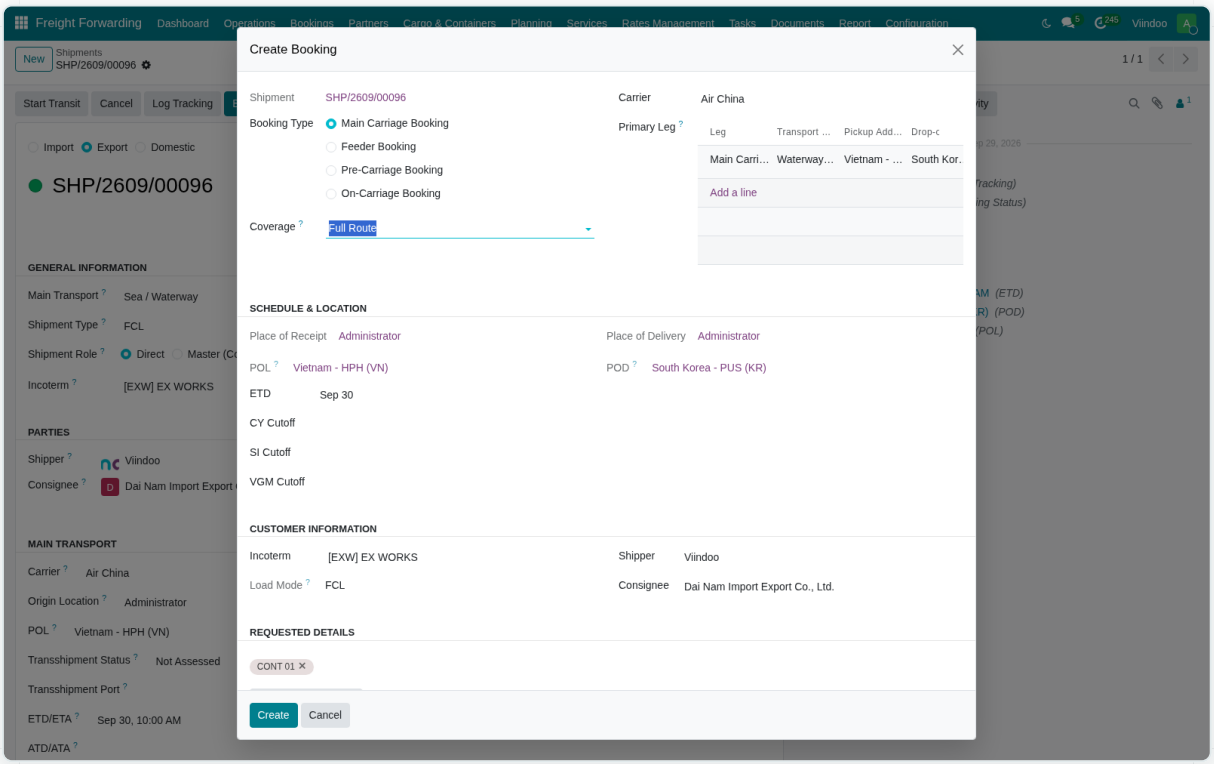


You should see: the status changes to **Confirmed** and the button bar has a **Booking** button.

> The **Booking** button appears only when the shipment is **Confirmed**. A shipment still in Draft has nothing to book yet.

Step 3 - Create a booking form from your own shipment

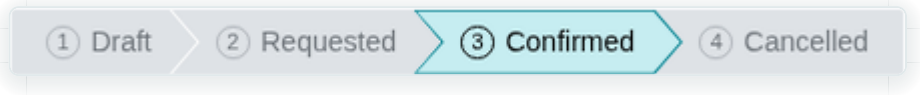
Click **Booking**. A wizard opens, with the shipment, carrier, origin, destination, ETD and ETA already filled in from that shipment. In the **Requested Details** section, click **Add a line** and enter one container line: choose Container 40FT for **Container Type**, enter 1 for **Container Qty**, and fill in **Volume** and **Commodity**. (For an LCL or air shipment this table changes to **Package Type**, **Quantity**, **Weight**, **Volume**.) Click **Create**.



You should see: a new booking form opens in the **Draft** status, linked to the shipment. Back on the shipment, the stat button bar has a **Bookings** button showing 1 and a **Containers** button showing 1 (container **CONT 01**, created by the wizard). The screenshot was taken on a shipment that already had its container, so the container appears as a tag at the bottom of **Requested Details**; on a new shipment you add the line yourself.

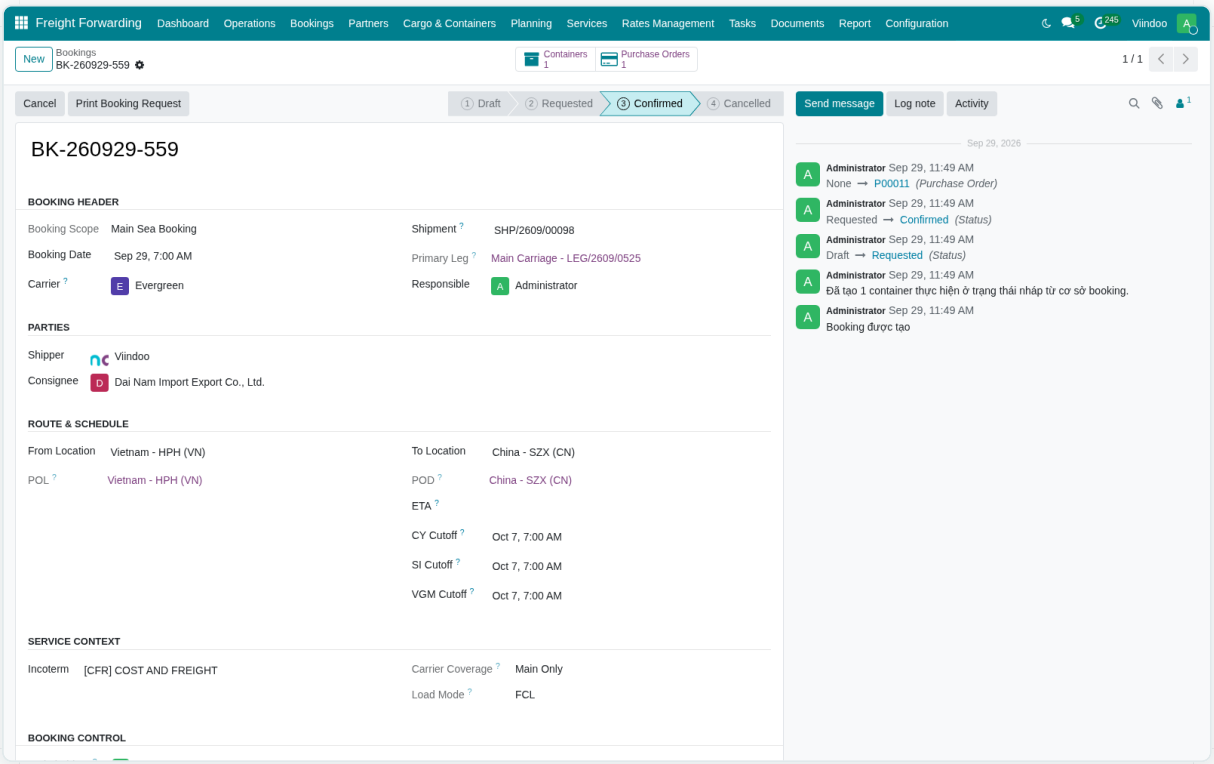
Step 4 - Move the form through three statuses

The status bar of the form has the steps **Draft**, **Requested**, **Confirmed**, **Cancelled**; the image below was taken while the form was at the **Requested** step.



Click **Mark as Requested**, then click **Mark as Confirmed**.

You should see: the current step is highlighted and changes from **Draft** to **Requested** and then **Confirmed**. The form holds the carrier, the transport leg, the parties and the **Route & Schedule** group.



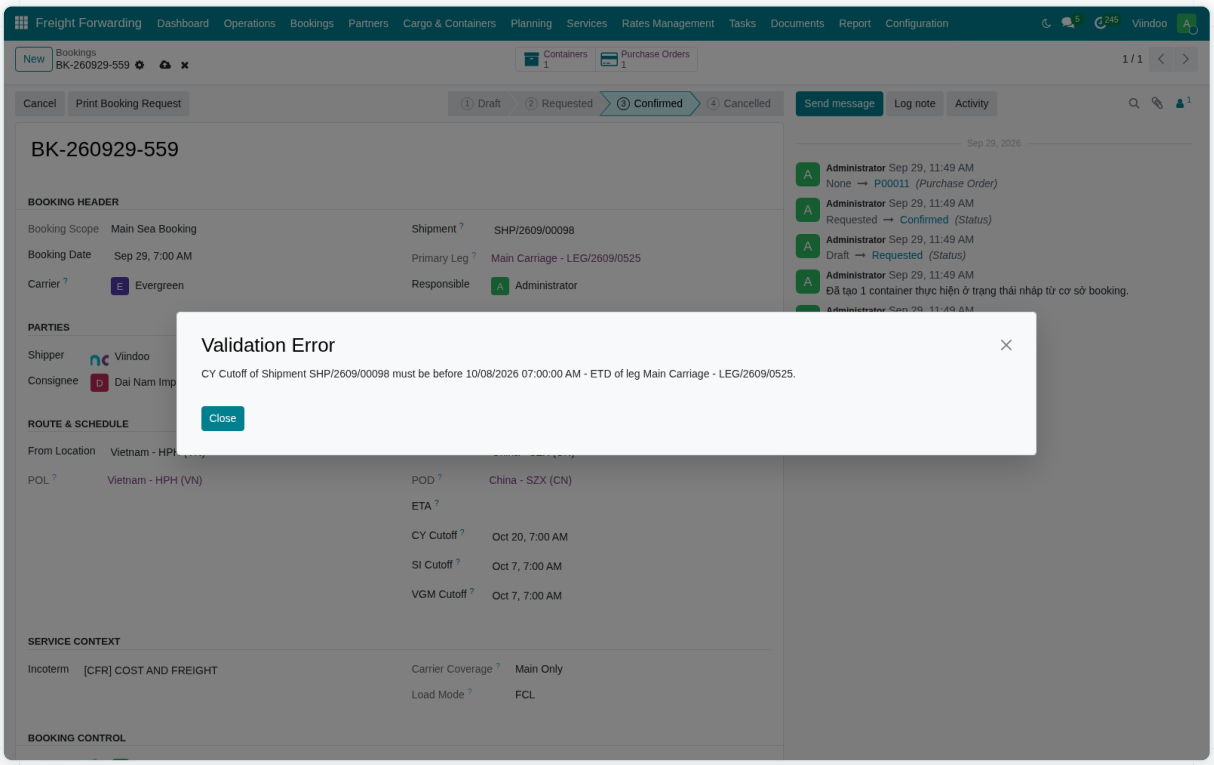
> **Why three steps:** "the request has been sent to the carrier" is very different from "the carrier has given us space". Merging the two loses the ability to answer the everyday question *"which shipments are waiting for the carrier to reply?"*.

Step 5 - Try to set an impossible cut-off deadline

This is the part most worth seeing for the head of documentation.

On your form, find the **Route & Schedule** group. The three fields **CY Cutoff**, **SI Cutoff** and **VGM Cutoff** are here.

Enter a **CY Cutoff** date and time **after** the ETD (for example one day later than the ETD) and save.



You should see: the system **refuses to save** and shows a **Validation Error** dialog (click **Close** to dismiss it) with text of the form:

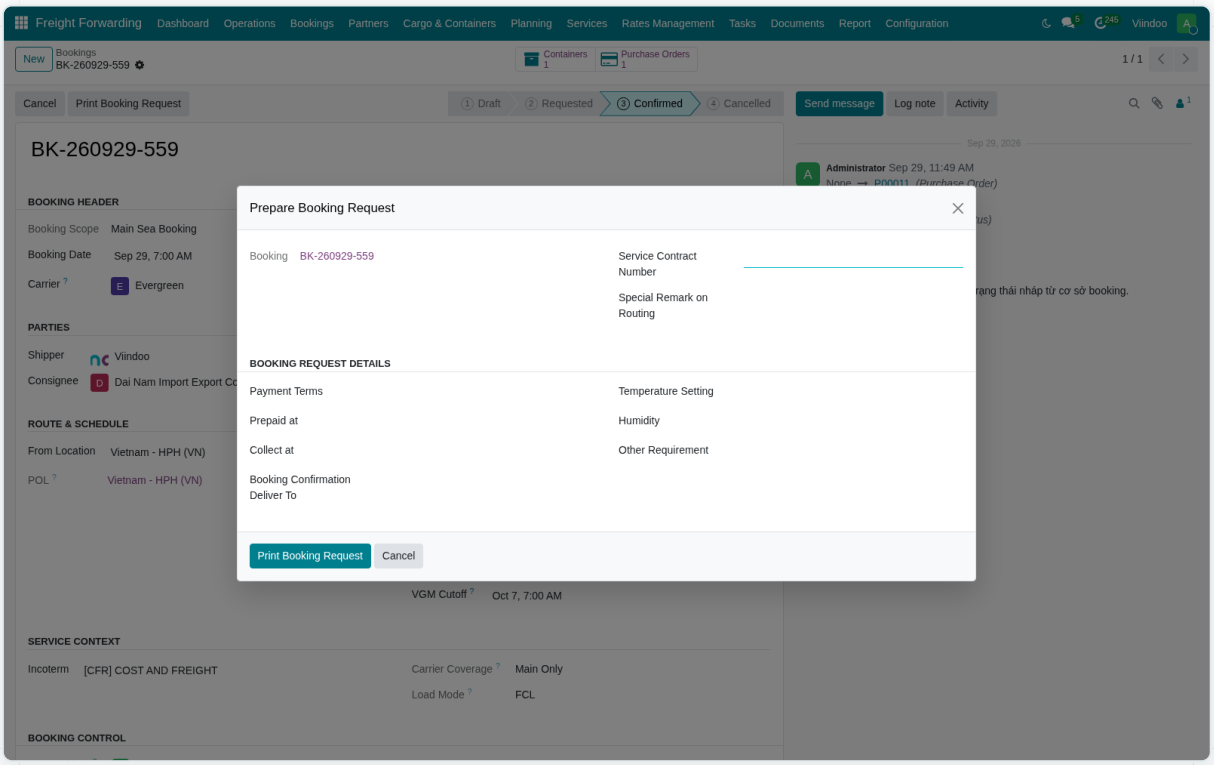
> *CY Cutoff of Shipment SHP/... must be before - ETD of leg Main Carriage - LEG/...*

Now enter a **CY Cutoff** date and time **before** the ETD and save again: this time it saves.

> **Why it matters:** the CY cutoff is the last moment a container can be delivered to the yard. Setting it after the vessel sails cannot happen in real life, and the software does not let you enter it. Staff do not have to remember or check it themselves.
>
> These three cutoff fields **appear only once the form is past Draft and the cargo is an export** - imports have no cutoffs because the space was already booked by the overseas side.

Step 6 - Print the booking request to send to the carrier

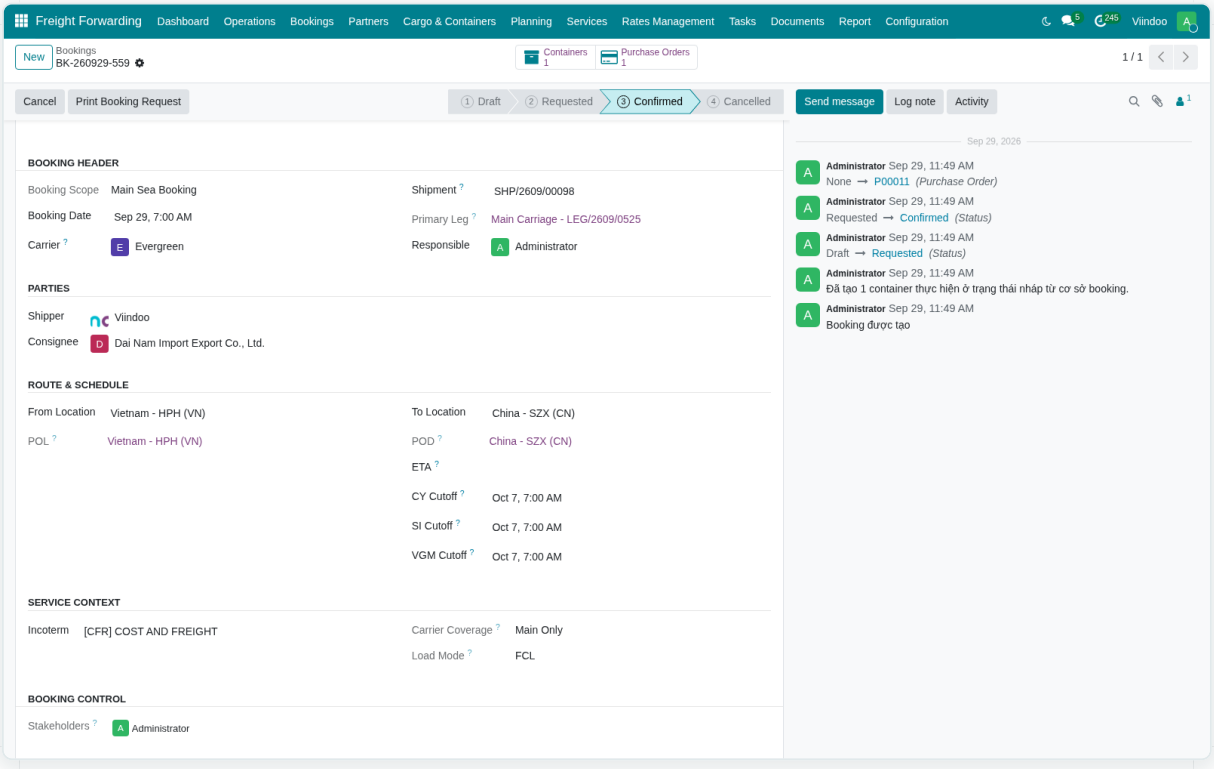
Click **Print Booking Request**. This button appears only on **sea** forms.



You should see: the **Prepare Booking Request** dialog with the content for the shipping line already built. An **air** form replaces this button with **Air Cargo Manifest**; a **road** form has **Cargo Manifest** and **Delivery Note** in the same place.

Step 7 - From booking to purchase order

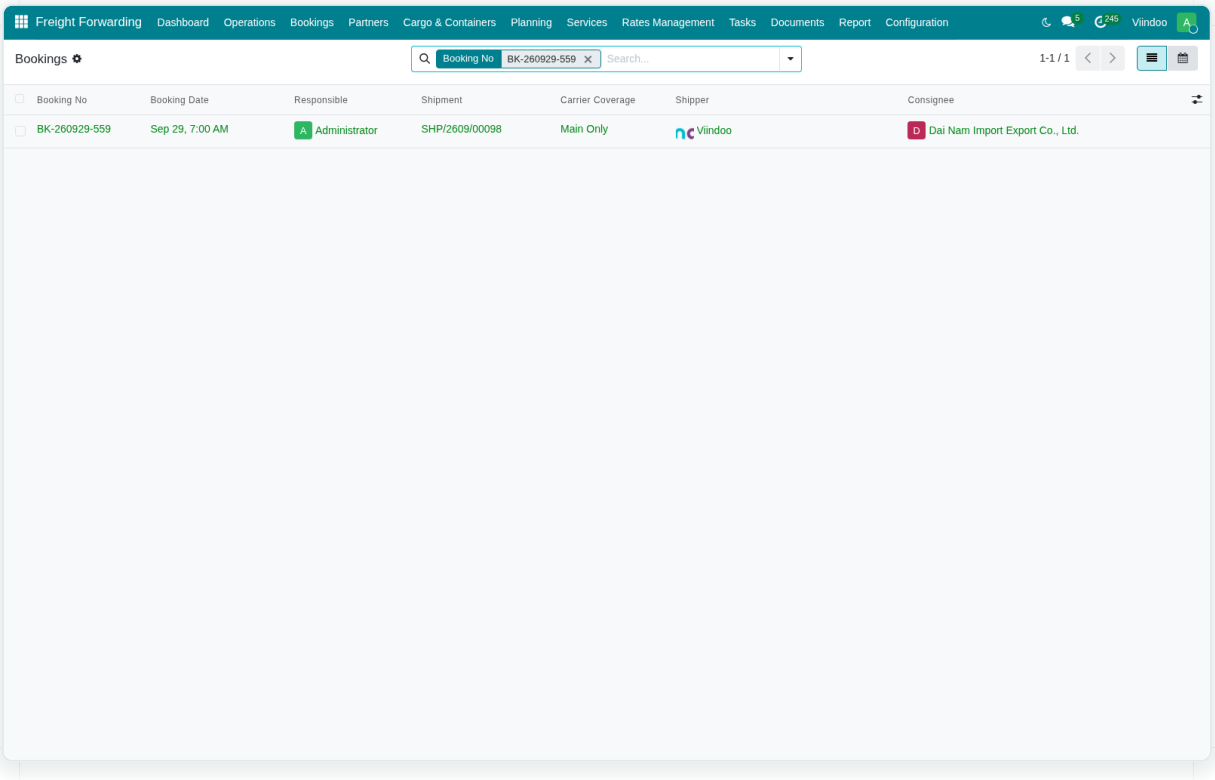
When the form is **Confirmed** and has no purchase order yet, the button bar shows a **Create Purchase Orders** button. Click it.



You should see: the **Create Purchase Orders** button disappears; a **Purchase Orders** stat button showing 1 appears on the form right away (the shipment also gets a **Purchase Orders** button). Click it to open a draft purchase order addressed to the carrier, built from the booking form itself. This order is only the cost frame: its total is zero until you enter the carrier's freight rate. It is the input for the shipment's cost, which you will meet again in Lesson 9.

Step 8 - Find the form again in the list

Go to `Freight Forwarding > Bookings > All Bookings > Carrier Bookings` and type your form number into the search box.



You should see: your form in the list (choose the search option **Booking No**), together with more than five hundred other forms once you remove the filter; each row has the form number, booking date, person in charge, shipment, carrier coverage, shipper and consignee.

03 CARGO, PACKAGES AND CONTAINER EQUIPMENT

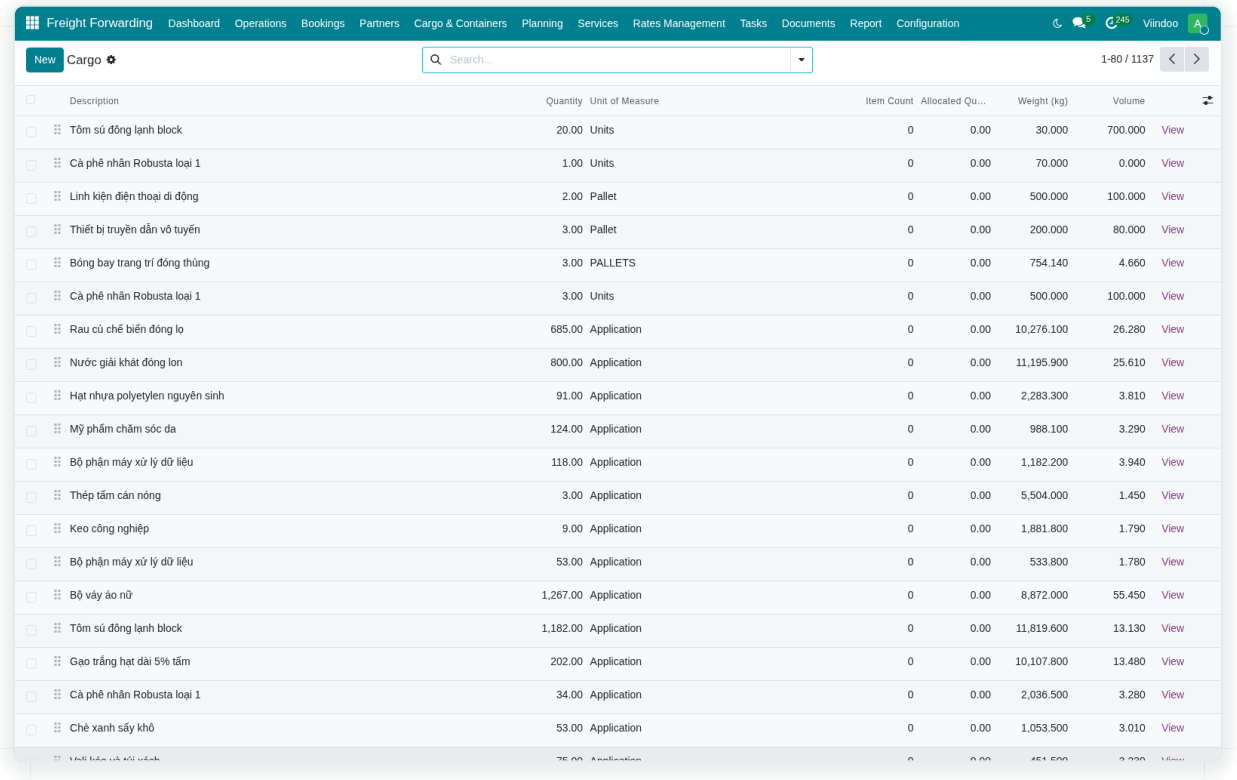
About 12 minutes. These three layers are often confused. This lesson makes clear what each layer is and how they connect.

Layer	What it is	Example
Cargo	the commercial item, with HS code, weight and volume	Cà phê nhân Robusta loại 1 (Grade 1 Robusta green coffee), 12 tonnes, 20 m3
Package	the physical packing unit	200 pallets

Layer	What it is	Example
Container (the equipment)	the box with a number and a seal number	CONT 40FT, number MSKU1234567

Step 1 - Look at the cargo list

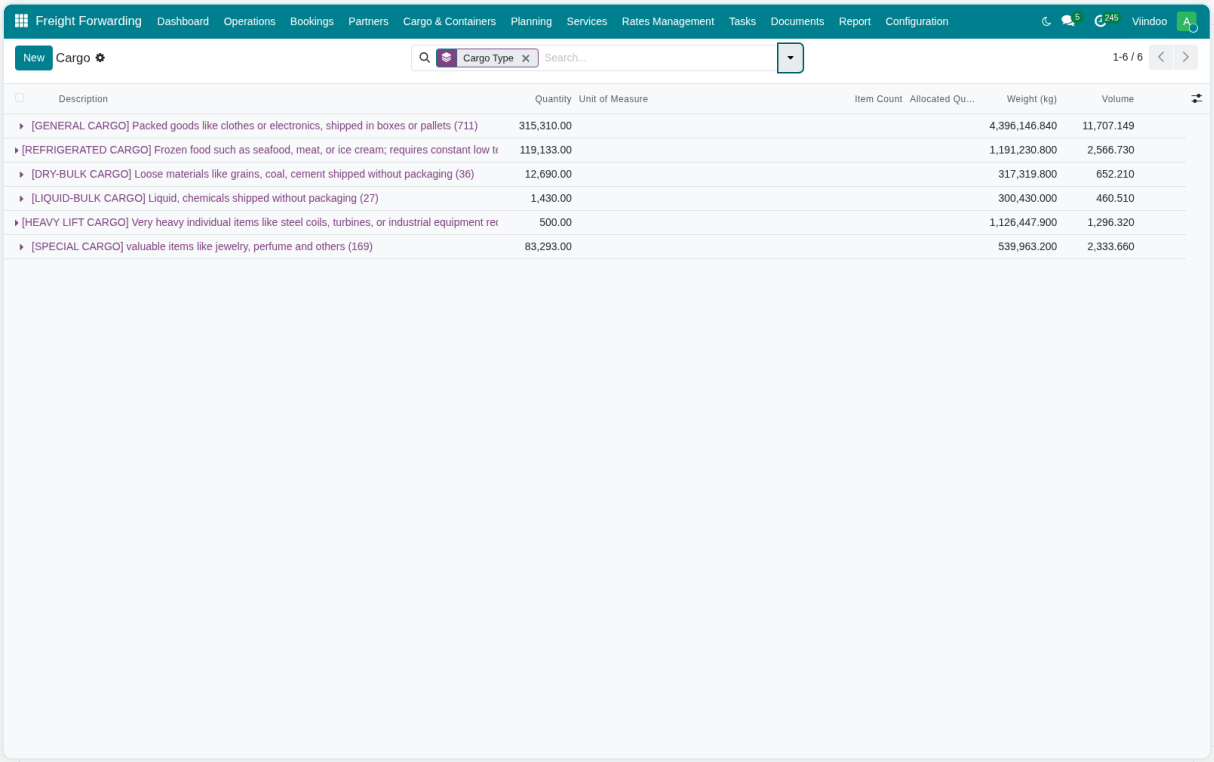
Go to `Freight Forwarding > Cargo & Containers > Cargo`.



You should see: more than a thousand cargo lines, each tied to a shipment, with the columns **Description** (the goods name), **Quantity**, **Unit of Measure**, **Item Count**, **Allocated Quantity**, **Weight (kg)**, **Volume**.

Step 2 - Group by cargo type

Click the arrow at the end of the search box, scroll down to **Custom Group** and choose **Cargo Type**.

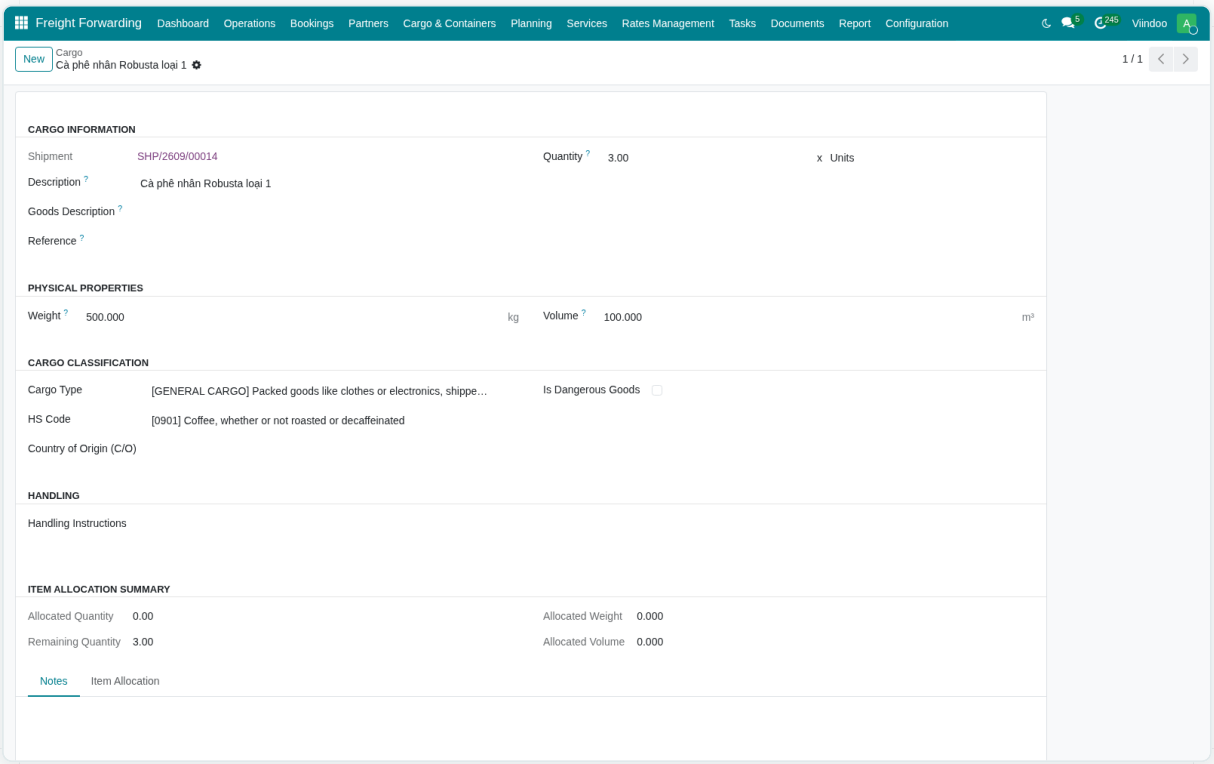


You should see: the groups **GENERAL CARGO**, **REFRIGERATED CARGO**, **DRY-BULK CARGO**, **LIQUID-BULK CARGO**, **HEAVY LIFT CARGO**, **SPECIAL CARGO** (and a **None** group for unclassified lines) - with the number of lines and the total weight and volume of each group.

> **Why it matters:** the cargo type decides how it is stowed, which equipment it needs and whether a permit is required. Refrigerated cargo must travel in a reefer, and dangerous goods must declare a UN number and a DG class. The system comes with **20 UN numbers** and **9 dangerous goods classes** (menu `Freight Forwarding > Configuration > Cargo Information`).

Step 3 - Open a cargo line

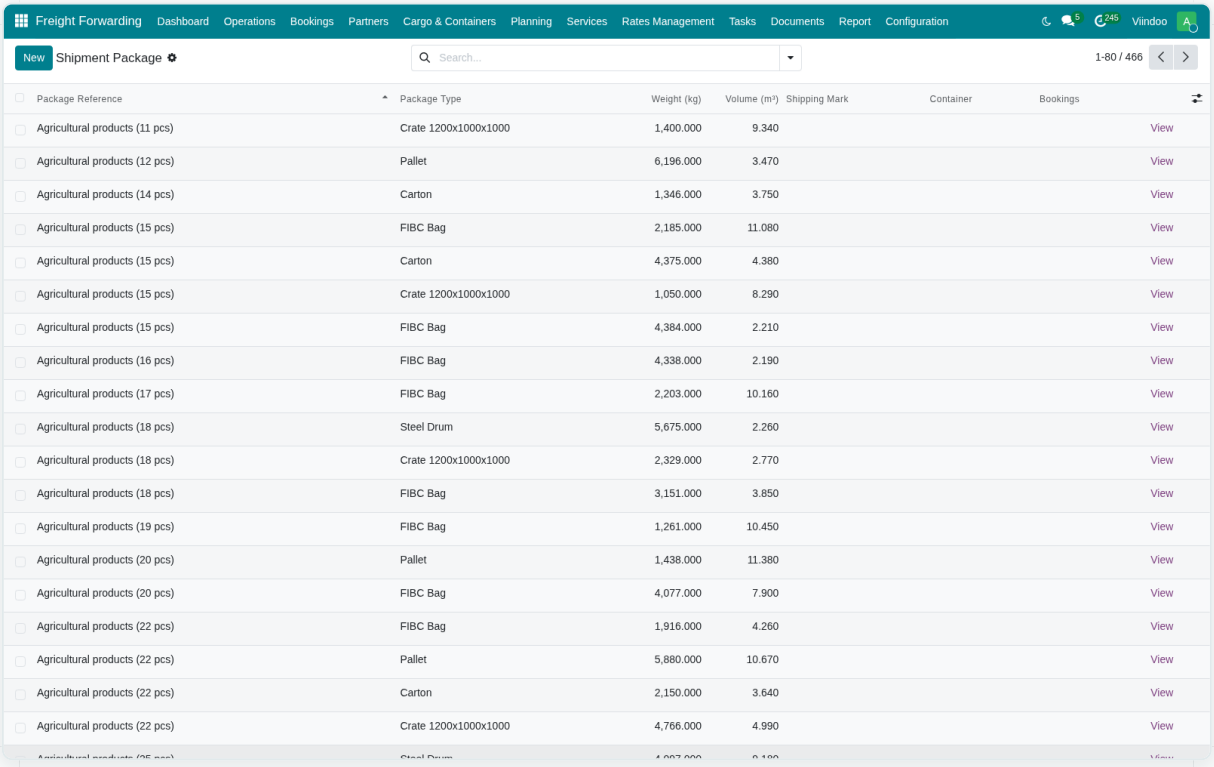
Click any line.



You should see: the blocks **CARGO INFORMATION** (shipment, description, quantity), **PHYSICAL PROPERTIES** (weight, volume), **CARGO CLASSIFICATION** (**Cargo Type**, the full **HS Code** - for example `[0901] Coffee, whether or not roasted or decaffeinated` - **Is Dangerous Goods**, **Country of Origin (C/O)**), **HANDLING** (handling instructions) and **ITEM ALLOCATION SUMMARY**, which shows the quantity allocated and the quantity remaining.

Step 4 - Look at the package list

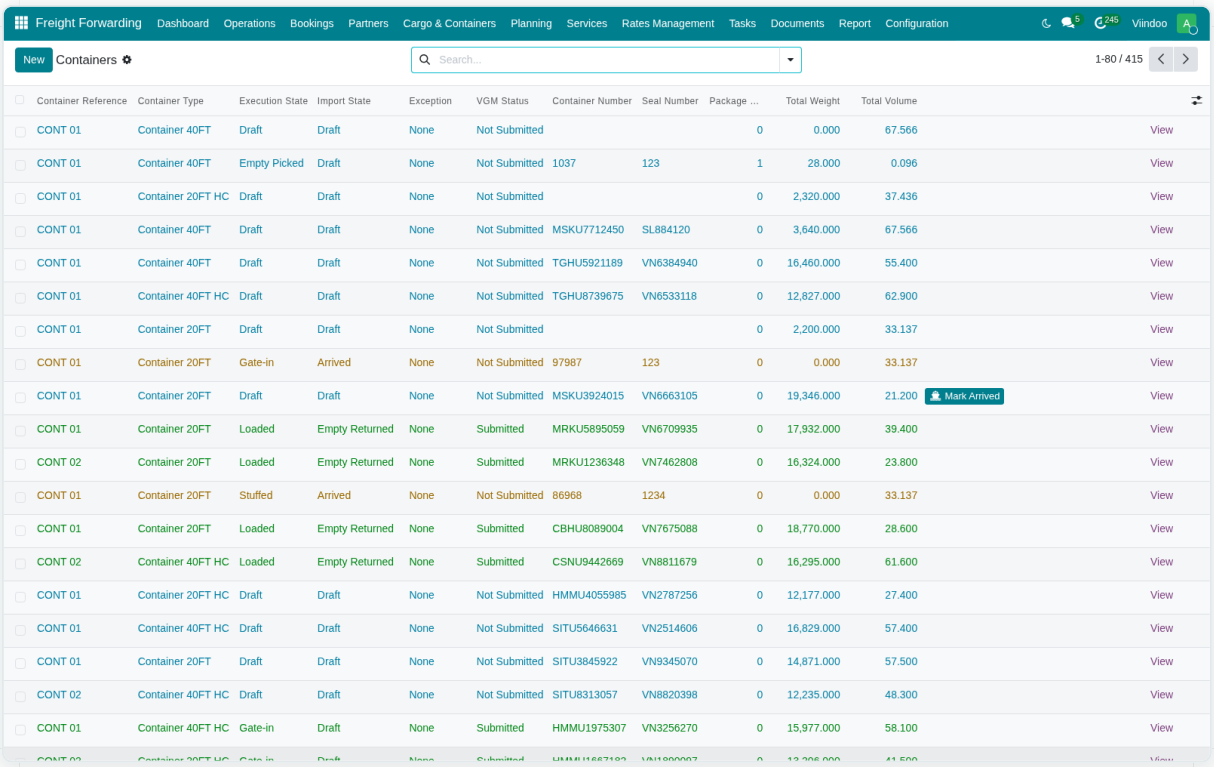
Go to `Freight Forwarding > Cargo & Containers > Packages`.



You should see: nearly five hundred packages, each row with **Package Reference**, **Package Type**, **Weight (kg)**, **Volume (m³)**, **Shipping Mark**, **Container**, **Booking**.

Step 5 - Look at the container list

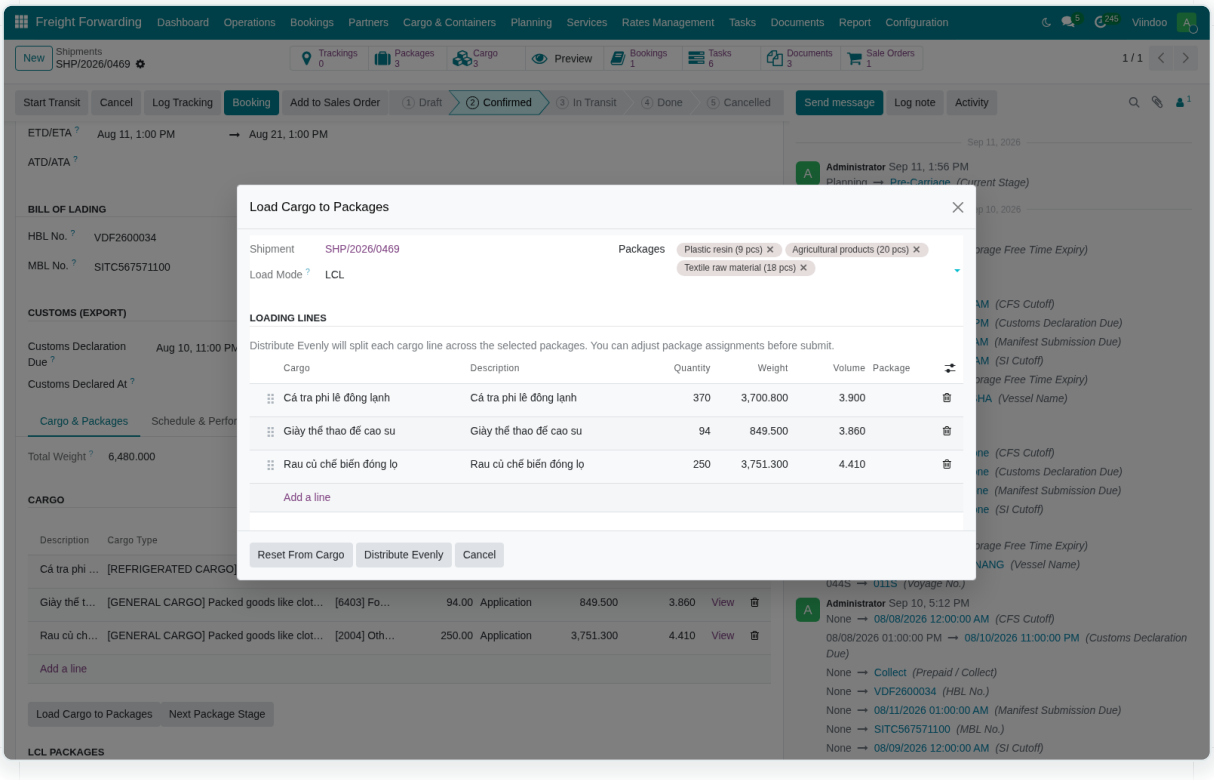
Go to `Freight Forwarding > Cargo & Containers > Containers`.



You should see: more than four hundred containers, each row with **Container Reference**, **Container Type**, **Execution State**, **Import State**, **Exception**, **VGM Status**, **Container Number**, **Seal Number**, **Package Count**, **Total Weight**, **Total Volume**.

Step 6 - Load cargo into packages (LCL)

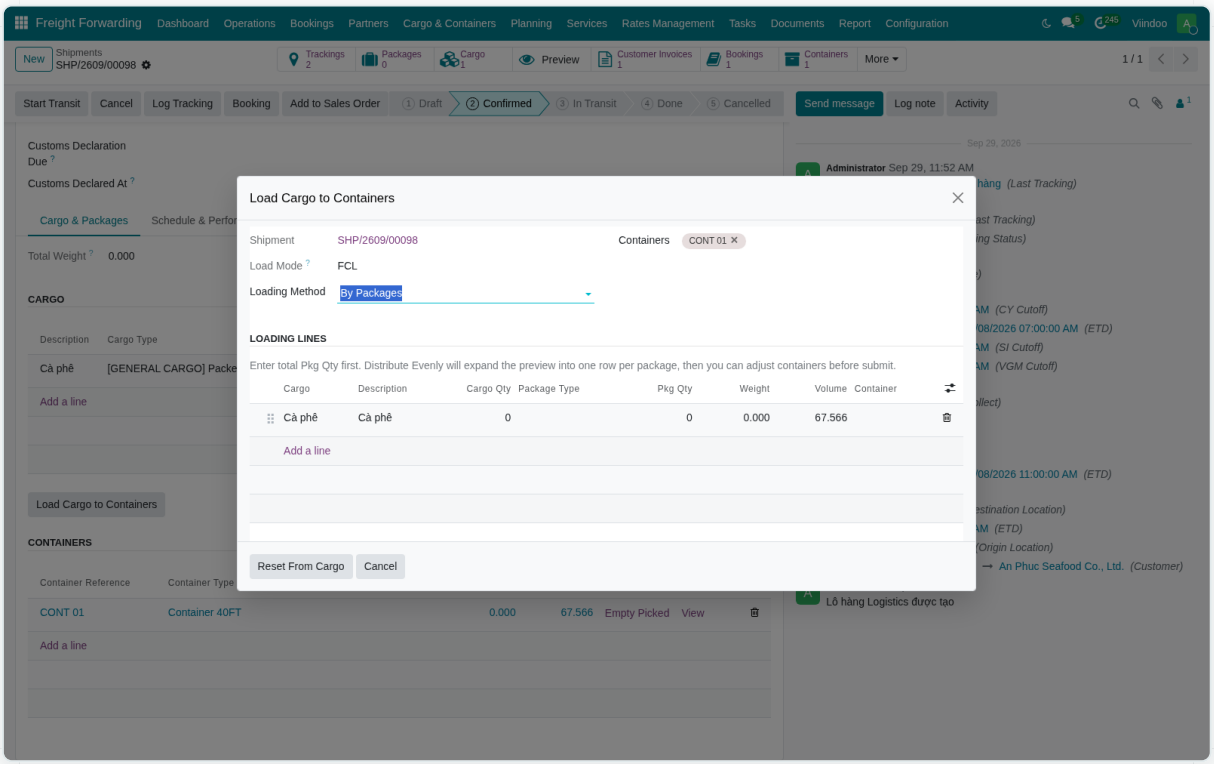
Do this step on an **LCL** shipment (created in Lesson 6, Step 1). Open the shipment, confirm it, and open the **Cargo & Packages** tab. Add a line in the **CARGO** table (**Description**, **Quantity**, **Weight (kg)**, **Volume**) and a line in the **LCL PACKAGES** table (**Package Reference**, **Package Type**, **Weight (kg)**, **Volume (m³)**), click **Save**, then click **Load Cargo to Packages**.



You should see: the **Load Cargo to Packages** dialog lists each cargo line with its **Quantity**, **Weight**, **Volume**; the **Packages** field holds the packages you just created (shown as tags) and the **Package** column of each line is still empty. Click **Distribute Evenly** to spread the cargo across the selected packages, adjust the **Package** column if needed, then confirm.

Step 7 - Load cargo into container equipment (full container)

Do this step on the full-container shipment from Lesson 2 (the shipment already has the container **CONT 01** and a cargo line that the booking wizard created from the **Commodity** line). Open the **Cargo & Packages** tab and click **Load Cargo to Containers**.



You should see: the **Load Cargo to Containers** dialog with the **Containers** field (CONT 01), the **Load Mode** field and the **Loading Method** field. Fill in **Cargo Qty**, **Package Type**, **Pkg Qty** (package count) and **Weight** on the cargo line, click **Distribute Evenly** - the dialog splits into one row per package, already linked to the container - and then click **Apply Loading Plan**. The shipment's **Packages** list now has the new packages, and the container's **Total Weight** and **Total Volume** add up automatically.

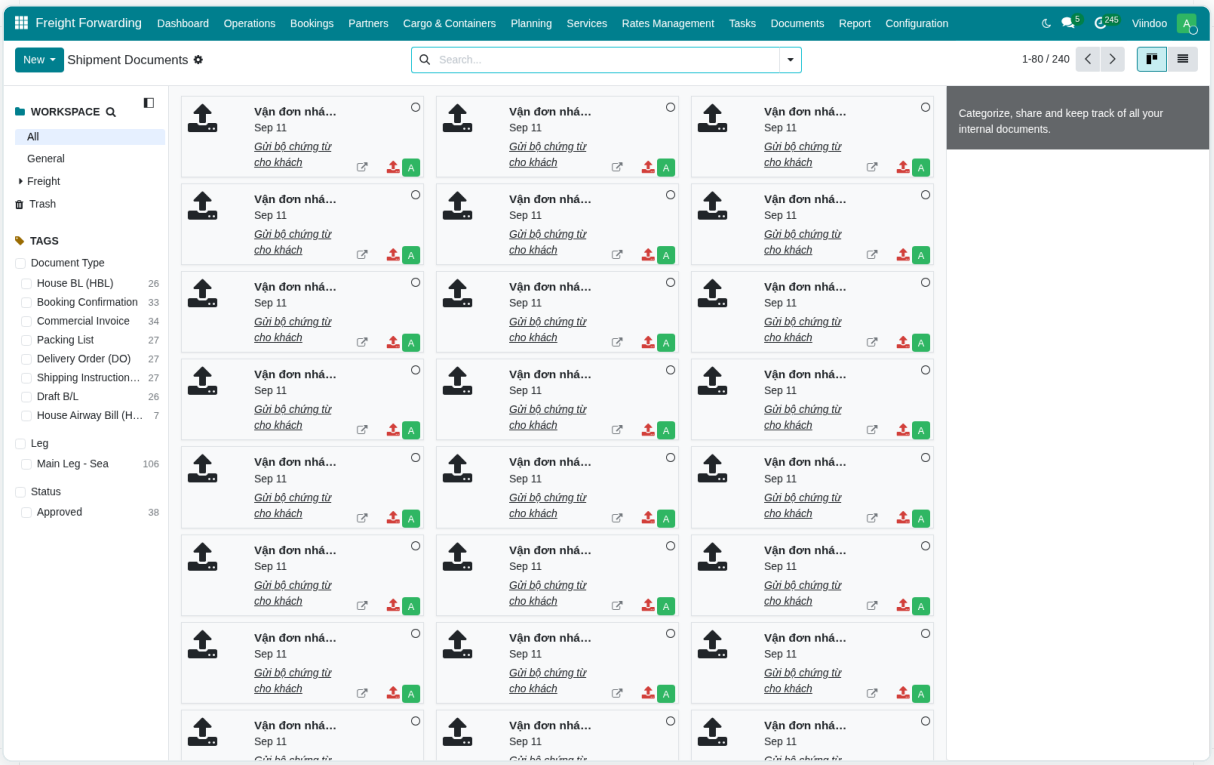
> **Why three layers:** a 40FT container carries about 67 m3 and roughly 27 tonnes of cargo. Once all three layers are entered, the system knows whether the container is full and knows which item sits in which container - which is what customs asks when it inspects the goods.

04 DOCUMENTS FOR EACH SHIPMENT

About 10 minutes. Freight forwarding lives on documents. Viindoo tracks each document as a task with a person responsible and a deadline.

Step 1 - See all the documents of all shipments

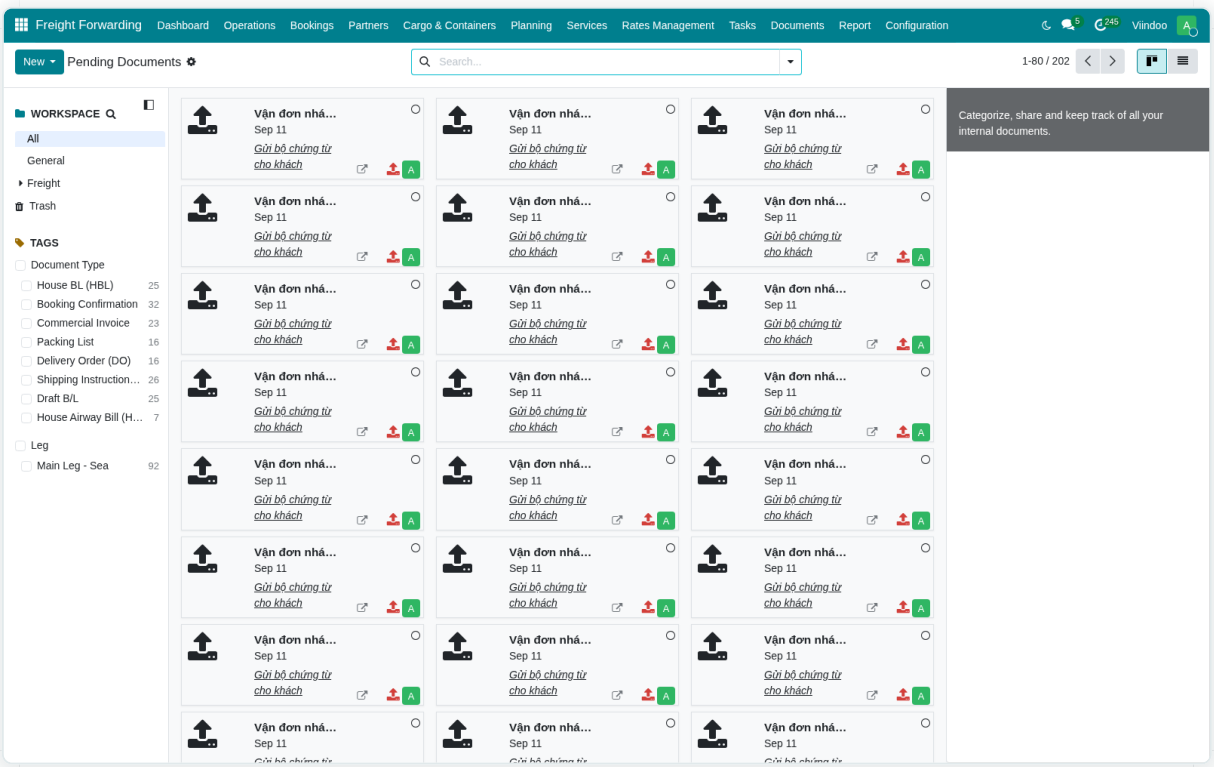
Go to `Freight Forwarding > Documents > Shipment Documents`.



You should see: more than two hundred documents as cards, each card with the document name, date and a short description; the left column filters by **Workspace**, **Tags** (leg, document type) and **Status**.

Step 2 - See the missing documents

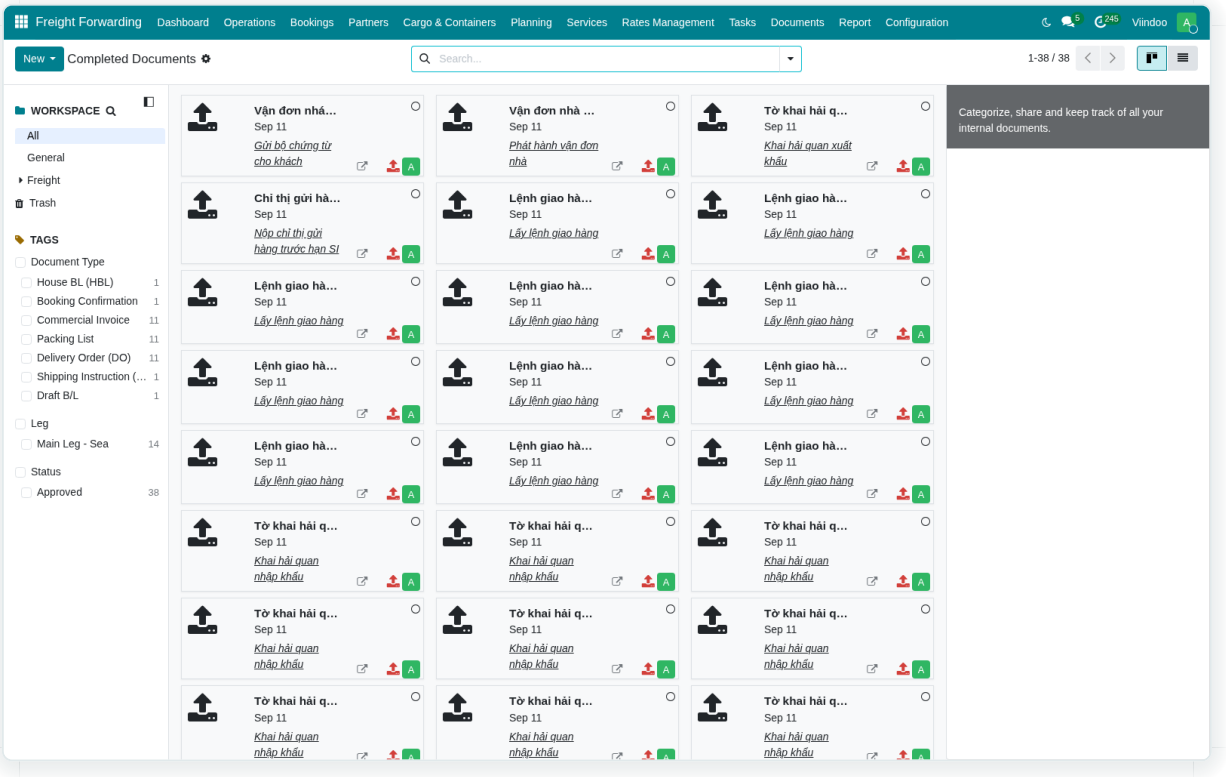
Go to `Freight Forwarding > Documents > Pending Documents`.



You should see: the documents **not yet submitted** (about two hundred cards) - exactly the work the documentation team has to do today.

Step 3 - See the finished documents

Go to `Freight Forwarding > Documents > Completed Documents`.

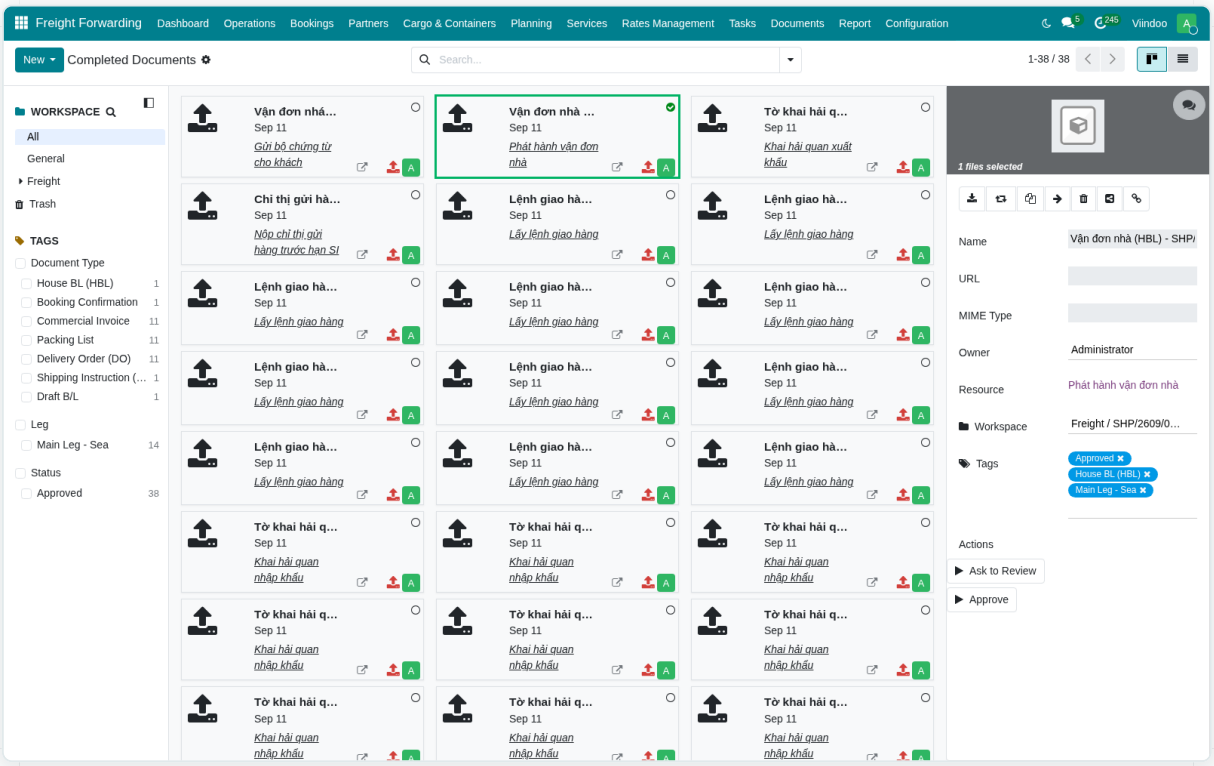


You should see: nearly forty documents carrying the **Approved** tag (the **Status** column on the left shows the count).

> **The classification rule:** a task moves to **Approved** only when **all** of its documents carry the *Approved* tag. If even one is missing, the whole task stays in the *Missing Documents* status. There is no such thing as half done.

Step 4 - Open a document

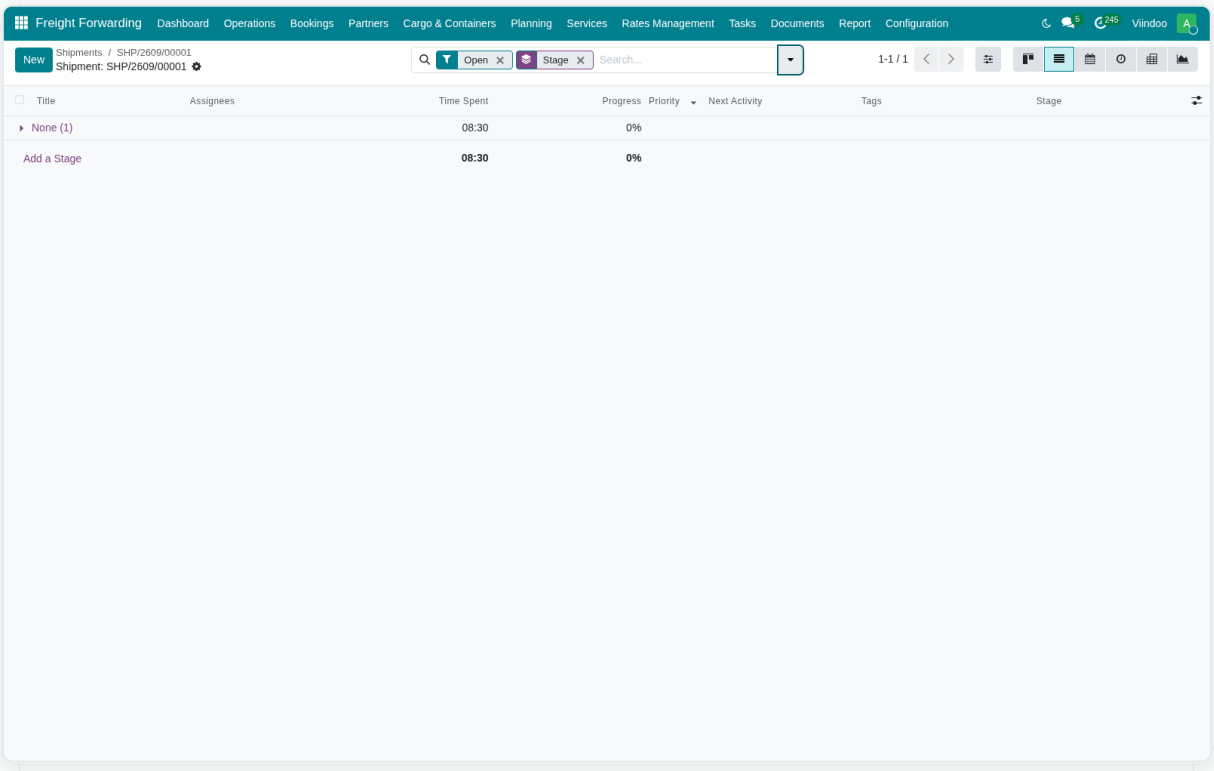
Click a card in **Completed Documents**.



You should see: the detail panel on the right with **Name**, **Owner**, **Resource**, the shipment's own **Workspace** folder, the **Tags** (for example **Approved**, **House BL (HBL)**, **Main Leg - Sea**) and the **Actions** section (**Ask to Review**, **Approve**).

Step 5 - See the documents from the shipment side

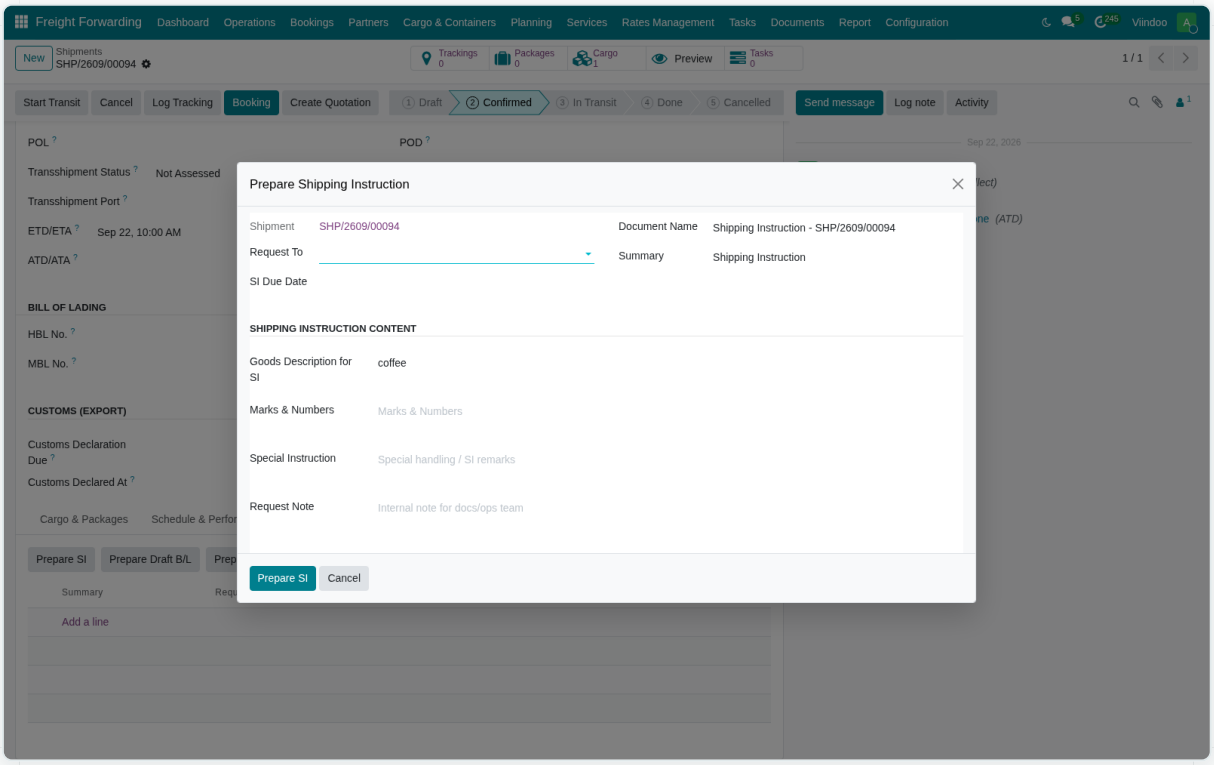
Open your shipment and click the **Tasks** stat button at the top of the record.



You should see: the shipment's task list (on your shipment, 11 tasks taken from the template, for example **Nhận yêu cầu và chốt lịch tàu** (receive the request and fix the vessel schedule), **Đặt chỗ với hãng tàu** (book space with the shipping line), **Nộp chỉ thị gửi hàng trước hạn SI** (submit the shipping instruction before the SI deadline)), each with its assignees, priority, next activity and stage. The screenshot shows an older sample shipment with a single task, grouped by stage.

Step 6 - Create a new document request

On your shipment, open the **Required Documents** tab and click **Prepare SI**. The dialog is titled **Prepare Shipping Instruction** (in English on screen): fill in **SI Due Date** (required), check **Goods Description for SI**, fill in **Special Instruction**, then click **Prepare SI**.



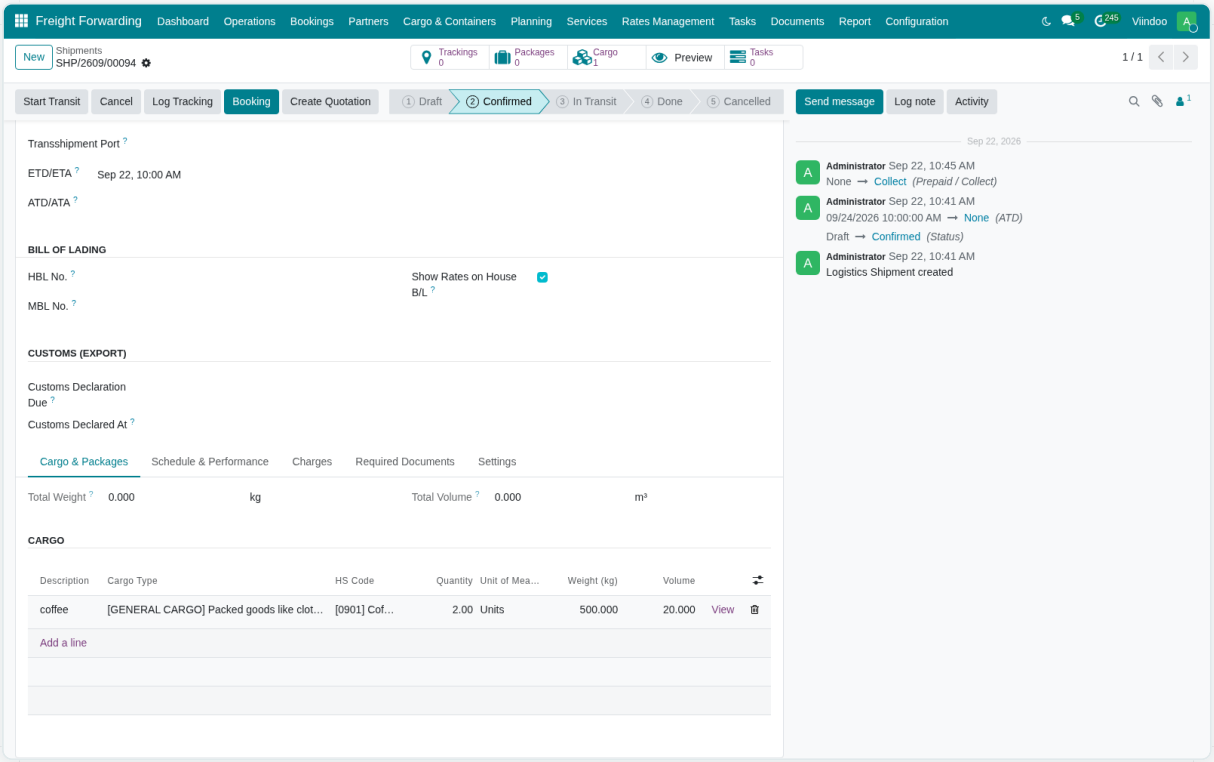
You should see: the system opens the **Shipping Instruction** document request you just created (with a **Due Date**, and the tags **Shipping Instruction (SI)** and **Main Leg - Sea**), and at the same time creates the shipment's document folder and adds a task linked to that request. You do not have to create the folder by hand.

05 CUSTOMS CLEARANCE AND THE TWO TYPES OF DECLARATION DEADLINE

About 6 minutes. This is where the trade is fined most often, so it deserves a close look.

Step 1 - Find the customs block on the shipment record

Open your export shipment (confirmed). Scroll down below the **BILL OF LADING** block - the **CUSTOMS (EXPORT)** block is right there, **above the row of tabs**, not inside any tab.

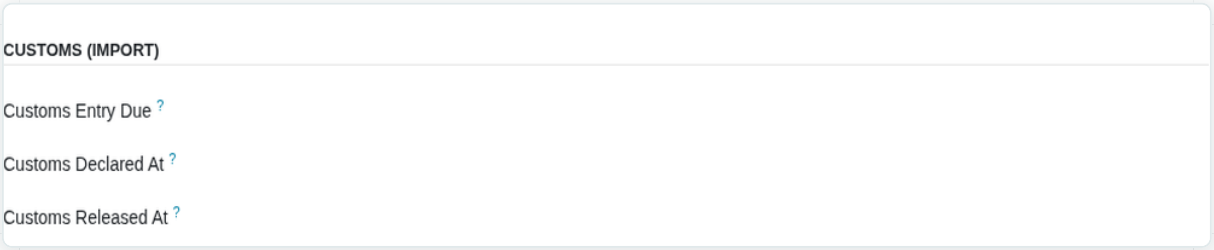


You should see: two time fields - **Customs Declaration Due** and **Customs Declared At**. The third field, **Customs Released At**, appears only after you record when the declaration was filed (Step 3).

> This block has no tab of its own and sits between two other blocks, so it is a little hard to find the first time.

Step 2 - Imports use a different block

Open an **import** shipment (for example the LCL shipment in Lesson 6). The block is renamed **CUSTOMS (IMPORT)** and the deadline field changes too.



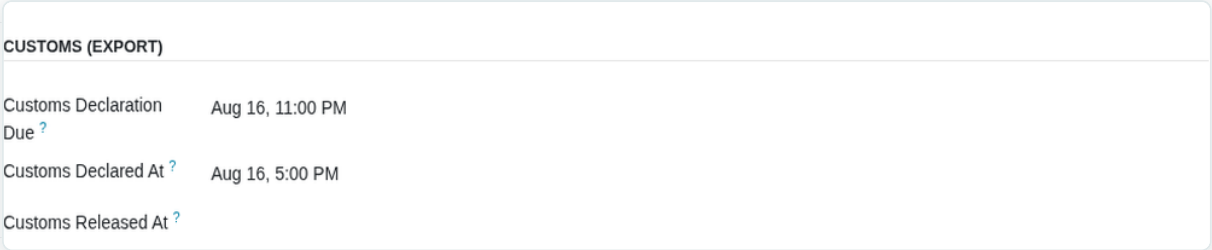
Deadline field	Applies to	Anchored to
Customs Declaration Due	**export** cargo	the sailing date - the declaration must be filed before the cargo leaves the port
Customs Entry Due	**import** cargo	the arrival date - the entry must be opened within the legal time limit after the cargo reaches the port

You should see: an import shipment shows **Customs Entry Due** in place of **Customs Declaration Due**. On the demo system, about **330 shipments** have an export declaration deadline and about **245 shipments** have an import entry deadline.

> **Why two fields:** the two deadlines are anchored to two different events and carry two different penalties. Merging them into one field would either raise a false warning for imports or miss exports.

Step 3 - Record that the declaration was filed

Fill in **Customs Declaration Due** and **Customs Declared At** and save. The **Customs Released At** field appears, empty.

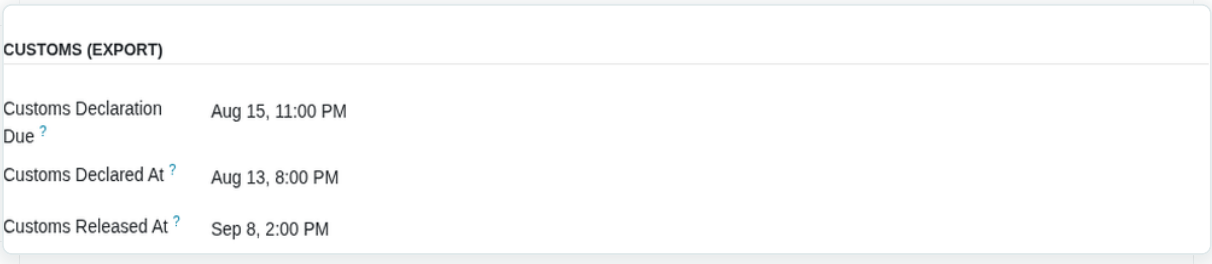


You should see: the first two fields hold a time, and **Customs Released At** is still empty - meaning the file has been submitted but the cargo has not yet been released.

> **One thing to say plainly:** the software does **not block** you from recording *cleared* before you have recorded *declaration filed*. If you record them in reverse order, the system still accepts it. This is team operating discipline, not yet a software barrier.

Step 4 - Record that the cargo is cleared

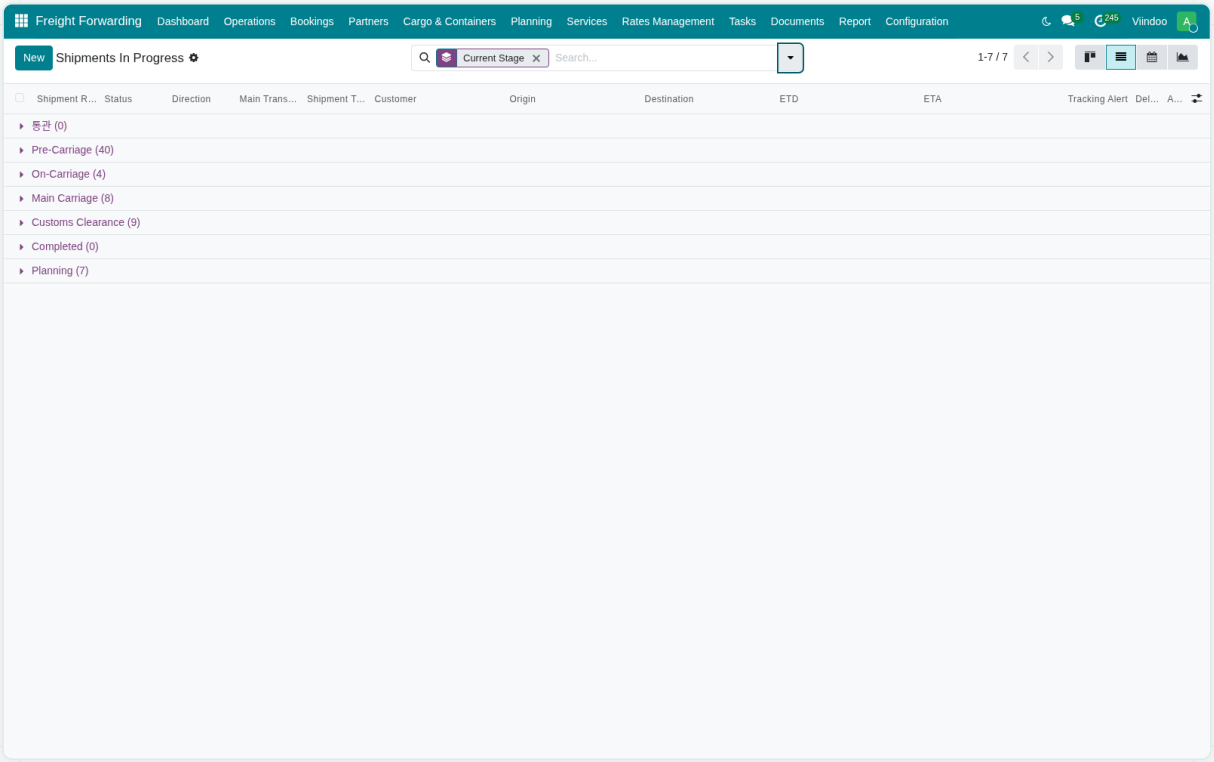
Fill in **Customs Released At**.



You should see: all three milestones - the deadline, the filing time and the clearance time. From here the shipment can move on to the next stage.

Step 5 - Filter the shipments waiting for clearance

Go to `Freight Forwarding > Operations > Stages > In Progress`, switch to list view, open the search box, and under **Custom Group** choose **Current Stage**.



You should see: the stage groups **Planning**, **Pre-Carriage**, **Customs Clearance**, **Main Carriage**, **On-Carriage**, **Completed**, each with the number of shipments currently in that stage. The list also has one group with an odd-looking name and 0 shipments - that is a surplus stage in the sample data; ignore it.

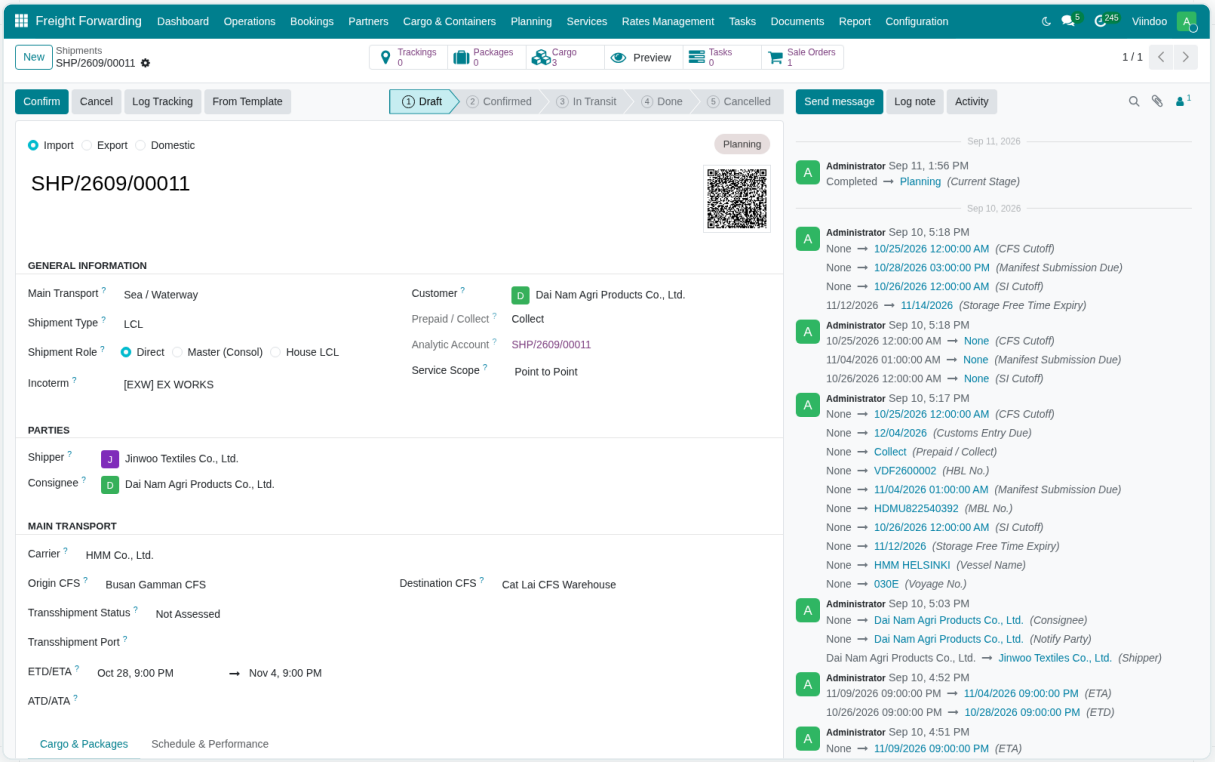
> **A limit to state plainly:** Viindoo does **not file the declaration** with the customs authority. Filing is done on the customs authority's own system. Viindoo records that the declaration was filed and the cargo cleared, and keeps the deadline milestones so that your company can follow them.

06 LCL IMPORTS, MASTER SHIPMENTS AND HOUSE SHIPMENTS

About 25 minutes. LCL is where a forwarder makes money, and also where it most easily loses it. This lesson shows how to consolidate several customers under one master bill of lading, split them into individual house shipments, and then allocate the cost back down. Every record in this lesson is created by you, so a second person repeating it still has every button to click.

Step 1 - Create an LCL shipment from the template

Go to `Freight Forwarding > Operations > All Shipments`, click **New**, click **From Template**, choose **MẪU - LCL nhập khẩu gom hàng (Busan - Hải Phòng)** (the LCL import consolidation template, Busan - Hải Phòng), click **Apply**.



You should see: Direction is *Import*, **Load Mode** is *LCL*, the shipment has two legs (the main sea leg Busan - Hải Phòng and a road **On-Carriage** leg), six stages, five charge lines and 8 tasks. The screenshot shows an LCL import whose consolidation warehouses were entered separately and whose tasks are not loaded. Like every shipment built from a template, the charge lines have no **Cost Price** or **Vendor** yet; this lesson does not need those two columns on the direct LCL shipment.

> **Good to know:** this template does **not** carry the consolidation warehouses (**Origin CFS**, **Destination CFS**) or the ports (**POL**, **POD**) into the new shipment, and once the shipment has a main leg those fields are locked and cannot be edited. If you want a shipment with consolidation warehouses, create the shipment **without a template** and fill in those fields before confirming, as in Step 5.

Fill in **Customer**, **Shipper**, **Consignee**, then click **Confirm**.

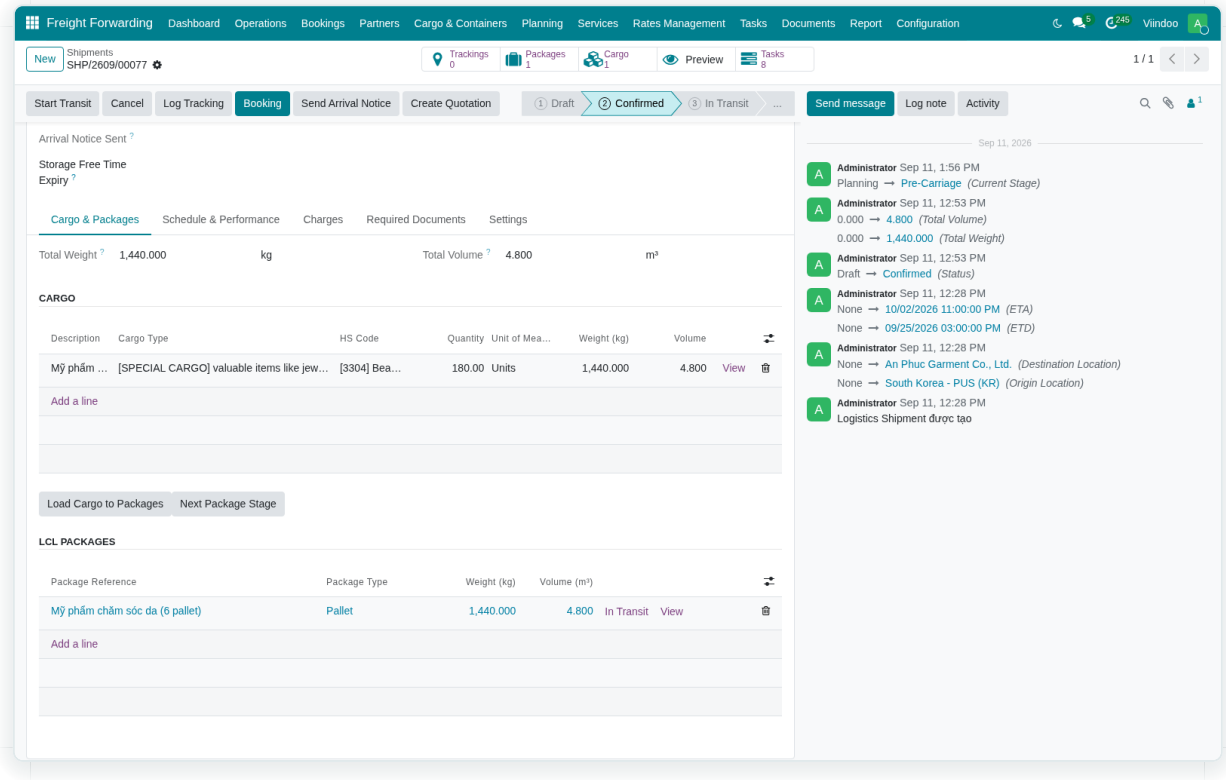
Step 2 - Three differences from a full container

Point	Full container (Lesson 1)	LCL
Route	port to port	must pass through a **consolidation warehouse** at both ends
Milestone chain	runs on the **container equipment**	runs on the **packages**

Point	Full container (Lesson 1)	LCL
Cutoff deadline	SI, CY and VGM deadlines	**the deadline to deliver cargo into the consolidation warehouse** (the **CFS Cutoff** field), earlier because the warehouse still has to wait for the load to fill

Step 3 - Run the LCL import milestone chain

The LCL milestone chain is **not on the shipment's button bar** but runs on **each package**. The **LCL PACKAGES** block appears only after the shipment is **Confirmed**. Open the **Cargo & Packages** tab, scroll down to the **LCL PACKAGES** block, add a package line (**Package Reference**, **Package Type**, **Weight (kg)**, **Volume (m³)**), click **Save**, then click **Next Package Stage**.

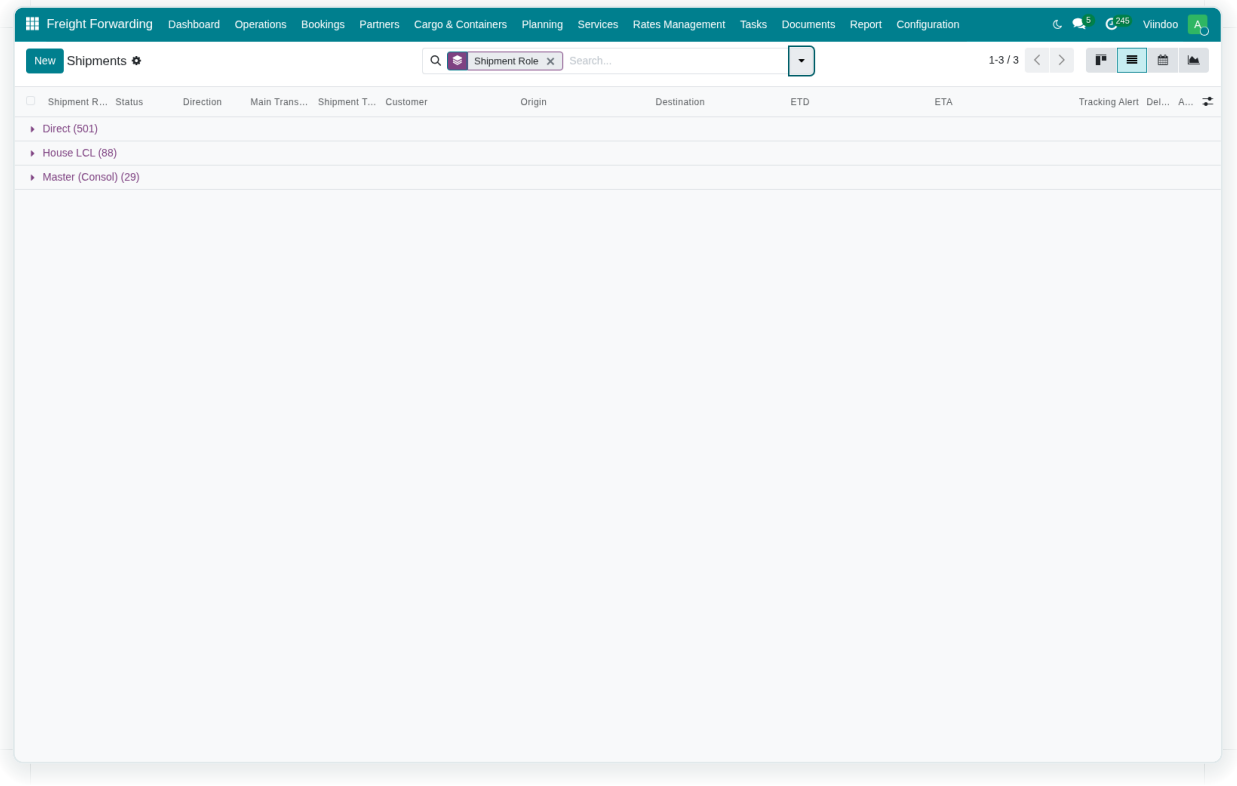


You should see: each package line has a next-step button named after the status it is about to move to - at first **In Transit** (the package is at *Pre-Alert*). Each time you click that button or the **Next Package Stage** button, the status jumps one step (in the screenshot the package is still at *Pre-Alert*, so its button reads **In Transit**; after one click the button changes to **At POD**) until *Delivered*.

Direction	The package status chain
Import	Pre-Alert > In Transit > At POD > At Destination CFS > Released > Delivered
Export	Draft > Ready > At Origin CFS > In Transit > At Destination CFS > Delivered

Step 4 - Look at the three shipment roles

Go to `Freight Forwarding > Operations > All Shipments`. Click the arrow at the end of the search box, scroll down to **Custom Group**, and choose **Shipment Role**.



You should see: three groups, with the number of shipments next to each group name - about 500 direct shipments, more than 90 House LCL shipments and about 30 Master shipments (the numbers grow as people try the demo):

Role	Meaning
Direct	one customer, one bill of lading
Master (Consol)	the master bill of lading that consolidates several customers
House LCL	the shipment of each individual LCL customer, sitting under the master shipment

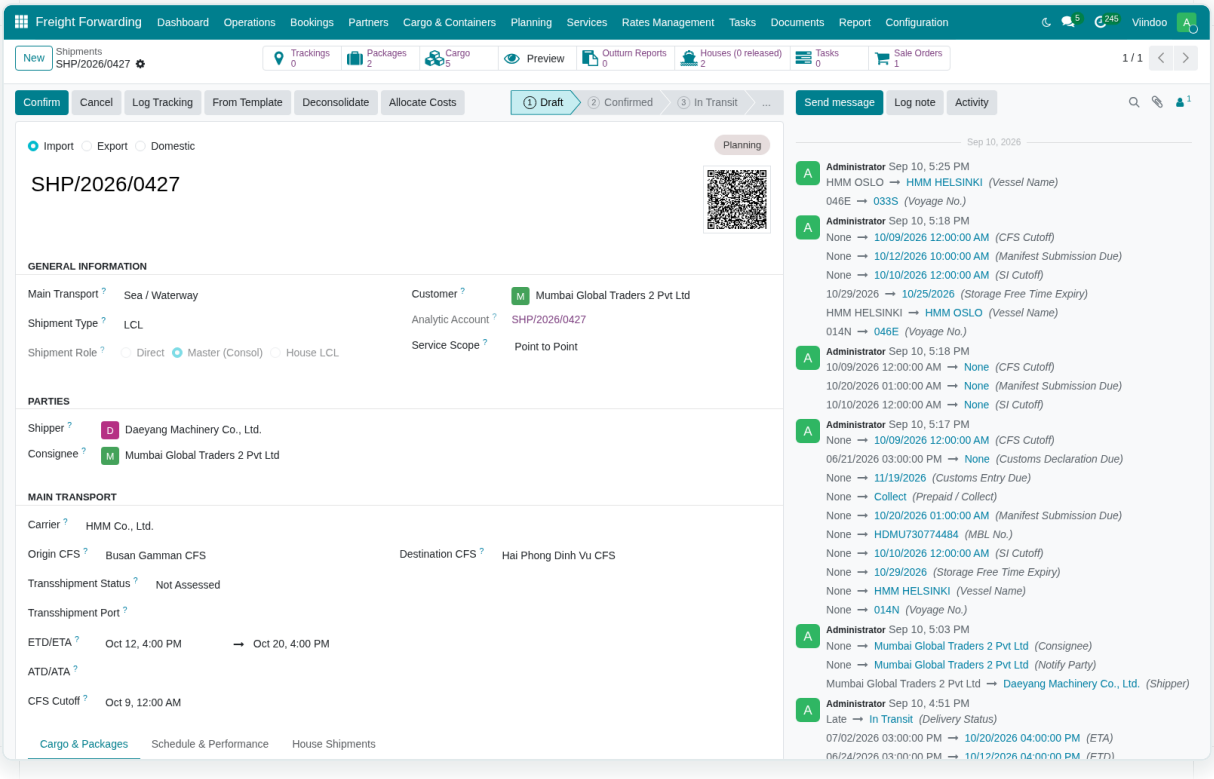
Step 5 - Create your own import master shipment

A master shipment is not created from a template. Go to `Freight Forwarding > Operations > All Shipments`, click **New** and fill in:

Field	What to enter
Direction	*Import*
Main Transport	*Sea / Waterway* (the default)
Shipment Role	*Master (Consol)*

Field	What to enter
Shipment Type	*LCL* - choose this one first so that the **Origin CFS** and **Destination CFS** fields appear (the POL and POD fields are then replaced by the two CFS fields)
Origin CFS, **Destination CFS**	the consolidation warehouses at both ends
Carrier	a shipping line
ETD/ETA	expected dates
Customer, **Shipper**, **Consignee**	any companies

Save, then click **Confirm**. After confirming, the **MBL No.** field (the master bill of lading number, set by you) appears in the **BILL OF LADING** block - fill it in and save.



You should see: the status **Confirmed**, the system has generated a main leg automatically, and the button bar has a **Deconsolidate** button (this button appears even while the shipment is still in Draft - the screenshot shows an unconfirmed master that already has two house shipments).

Step 6 - Enter the cost price on the master shipment

Open the **Charges** tab of the master shipment and add two lines:

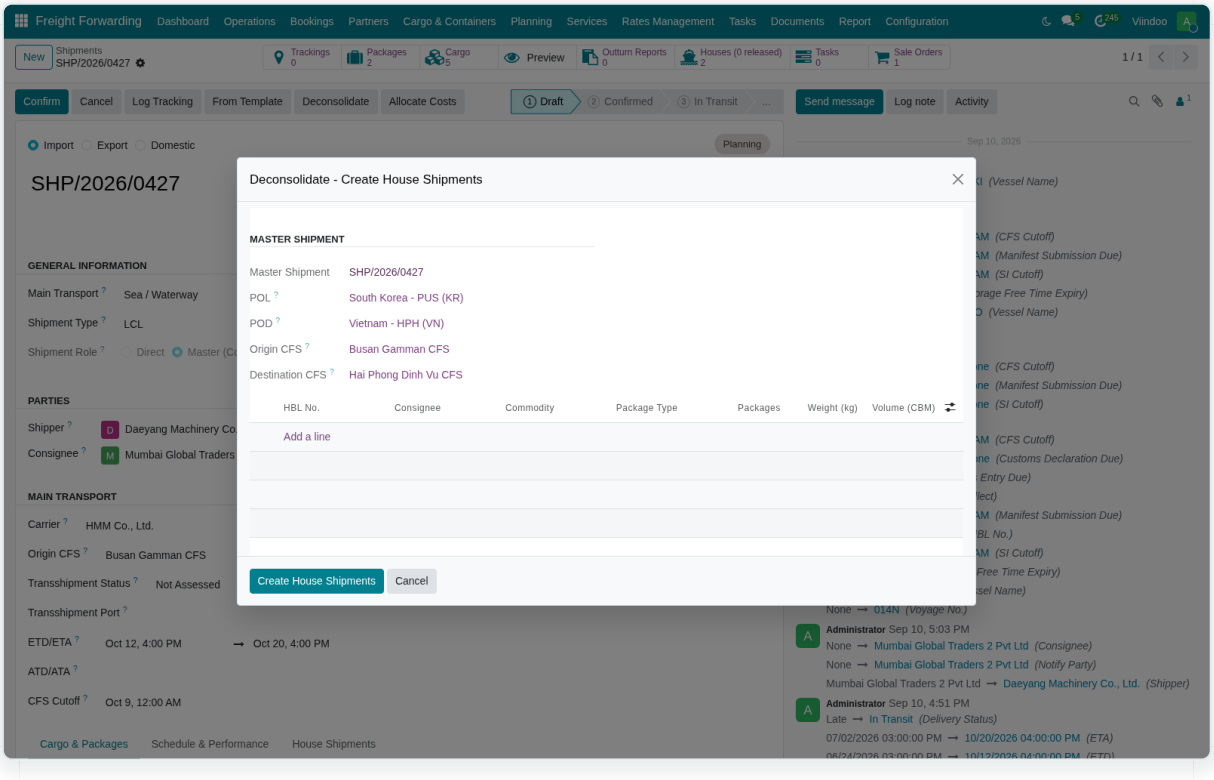
Service product	Vendor	Cost Price
Terminal Handling Charge (THC)	a shipping line	6,000,000
Demurrage Fee	the same shipping line	3,000,000

Save.

You should see: the two lines have **Cost Price** and **Cost Amount** equal to 6,000,000 and 3,000,000 (the selling **Unit Price** of these two lines is filled in by the product and is not used in this lesson). This is the charge billed by the shipping line for the whole container, and it will be split down to the house shipments in Step 8.

Step 7 - Split the master into house shipments

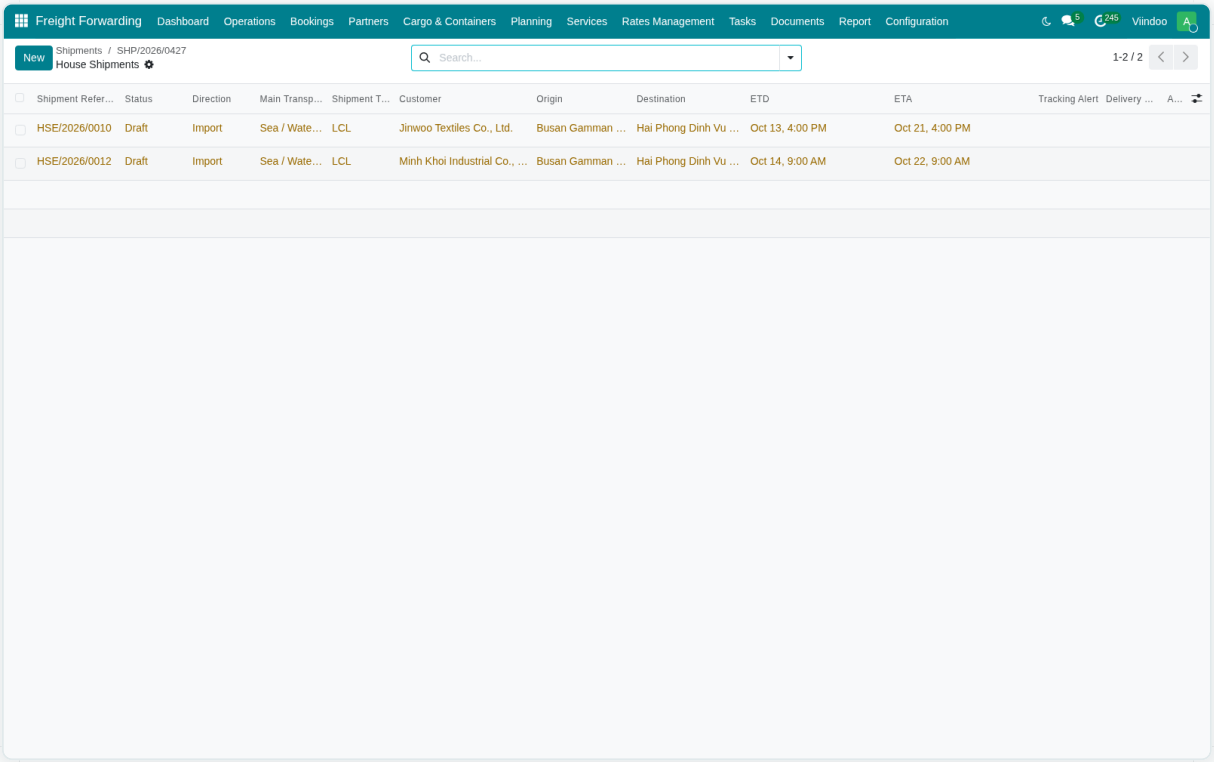
On the master shipment, click **Deconsolidate**. A wizard appears with a list of **Consignee**s (the screenshot shows it before any line is entered). Add two lines, one for each LCL customer, and fill in **HBL No.**, **Commodity**, **Packages**, **Weight (kg)**, **Volume (CBM)**. For example the first customer 2.5 CBM and the second 1.5 CBM. Click **Create House Shipments**.



You should see: the system creates two house shipments with the **House LCL** role (status **Draft**), each with its own HBL number and consignee, both linked back to the master; the master has a **Packages** stat button showing 2.

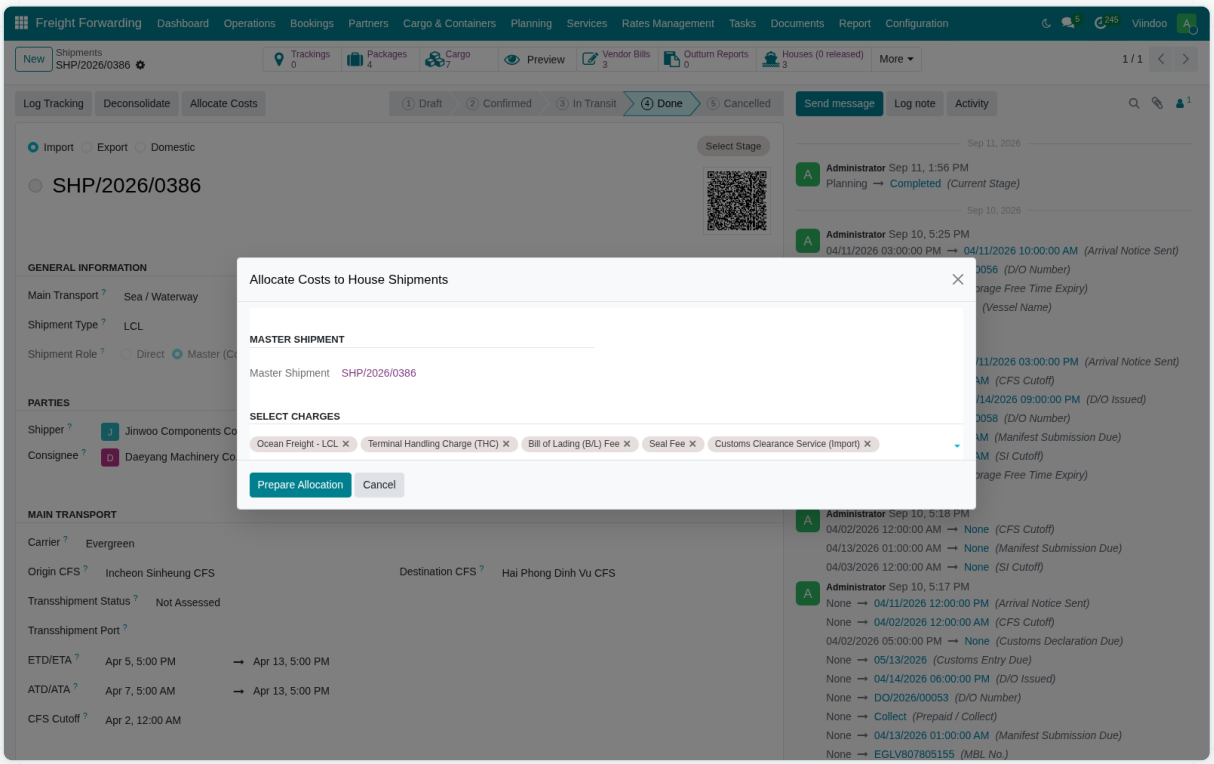
Step 8 - Look at the house shipments and allocate the cost

Go back to the master shipment. The stat button bar now has a **Houses (0 released)** button showing 2, and the **Allocate Costs** button has appeared. Click the **Houses** button to see the list of house shipments.



> The **Allocate Costs** button appears only when the master has both of these: house shipments beneath it, and a cost that is not yet settled with the vendor and can be allocated. That is why you must split the shipment (Step 7) and enter the cost price (Step 6) first.

Click **Allocate Costs** (the dialog is titled **Allocate Costs to House Shipments**; your charges are already selected in the **Select Charges** section), then click **Prepare Allocation**. The screenshot shows this first step on another master shipment with five charges selected.



You should see: the dialog gains an **Allocation Preview** section listing each cost with a default **Split Method** of *By Volume* (the other choices: *Equal*, *By Quantity*, *By Revenue Ton (W/M)*, *Manual*). The preview is not in the screenshot, which stops at the first step. In the example above, the 2.5 CBM customer receives 62.5% (the 6,000,000 charge becomes 3,750,000, the 3,000,000 charge becomes 1,875,000) and the 1.5 CBM customer receives 37.5% (2,250,000 and 1,125,000). Click **Confirm Allocation**.

Reopen each house shipment and its **Charges** tab: each house shipment now has two cost lines (a house shipment must be **Confirmed** before this tab appears), and the **Allocated From** column points to the master's line.

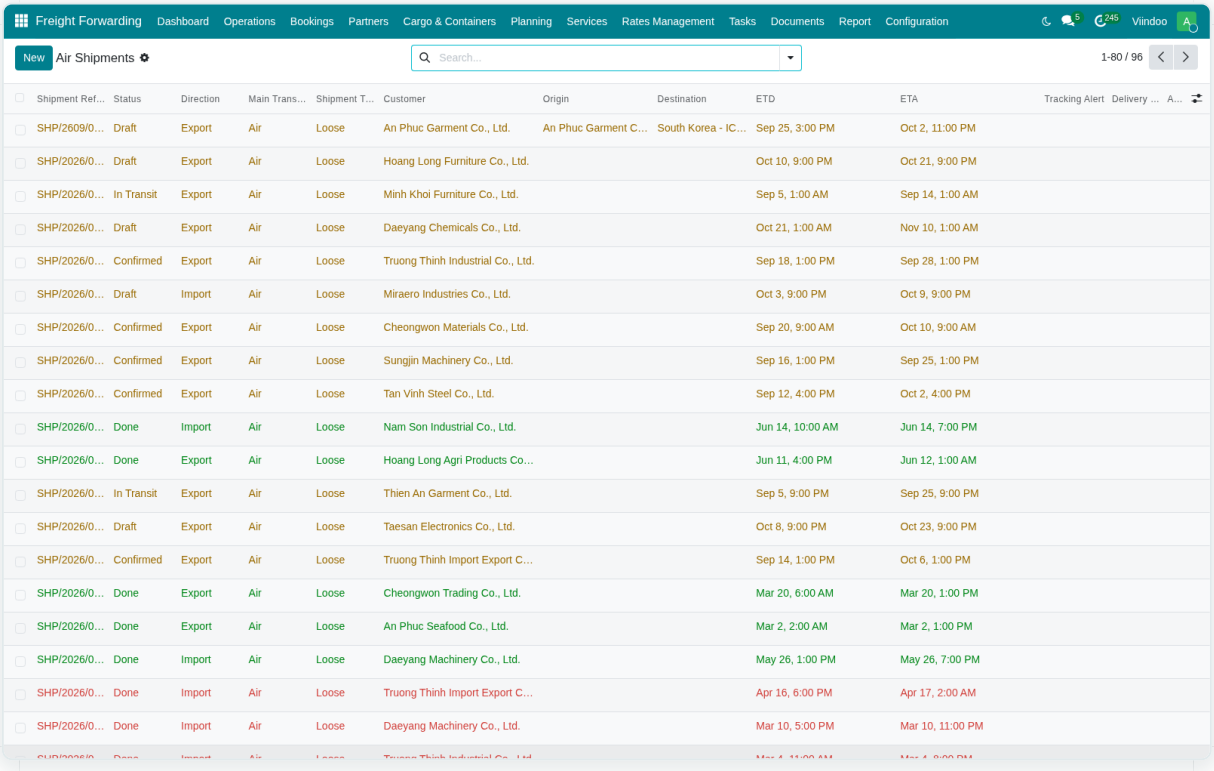
> **This is the money story of LCL.** The main-leg freight billed by the shipping line is for the whole container. To know how much each LCL customer earns, you have to split that charge down. Split it wrongly and you think you made a profit all month when in fact you lost money.

07 AIR FREIGHT

About 12 minutes. The same process, only with the parts specific to air.

Step 1 - Look at the existing air shipments

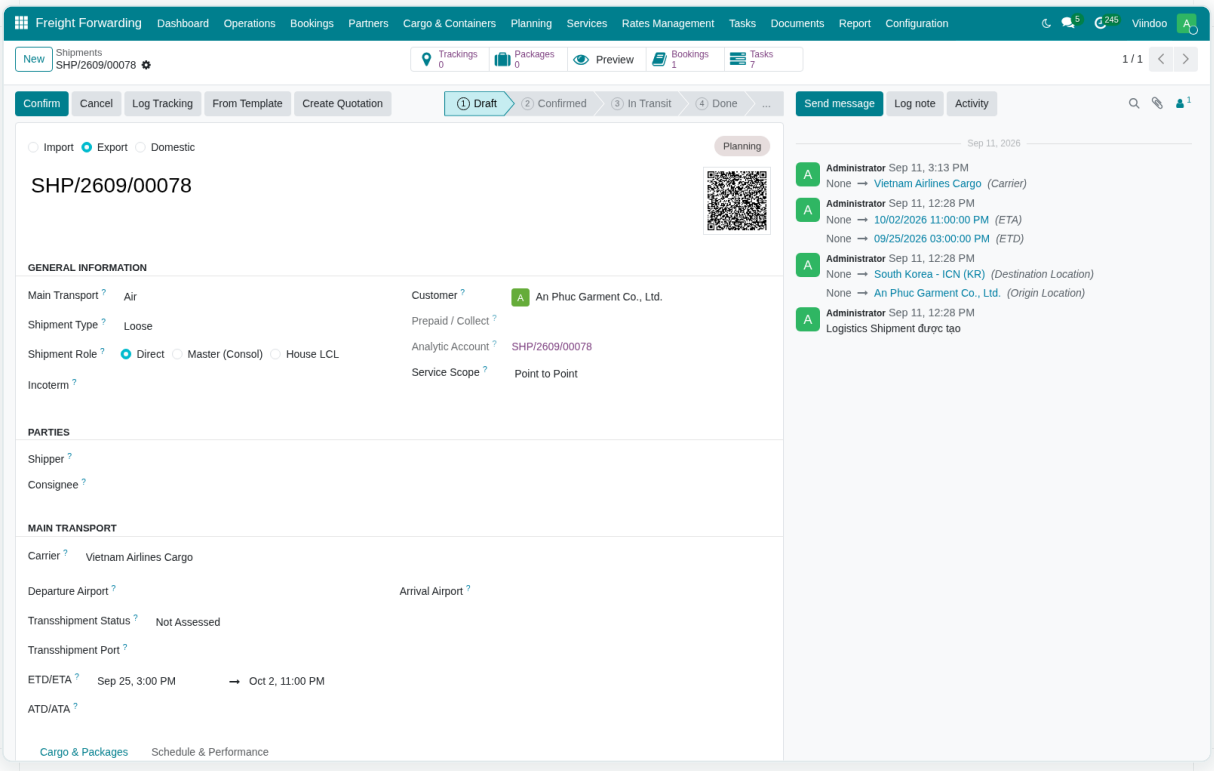
Go to `Freight Forwarding > Operations > Air > Air Shipments`.



You should see: about 100 air shipments (**Main Transport** is *Air*); the **Origin** and **Destination** columns show airports instead of seaports.

Step 2 - Create an air shipment from the template

Click **New**, click **From Template**, choose **MẪU - Hàng không xuất khẩu (Nội Bài - Incheon)** (the air export template, Nội Bài - Incheon), click **Apply**.

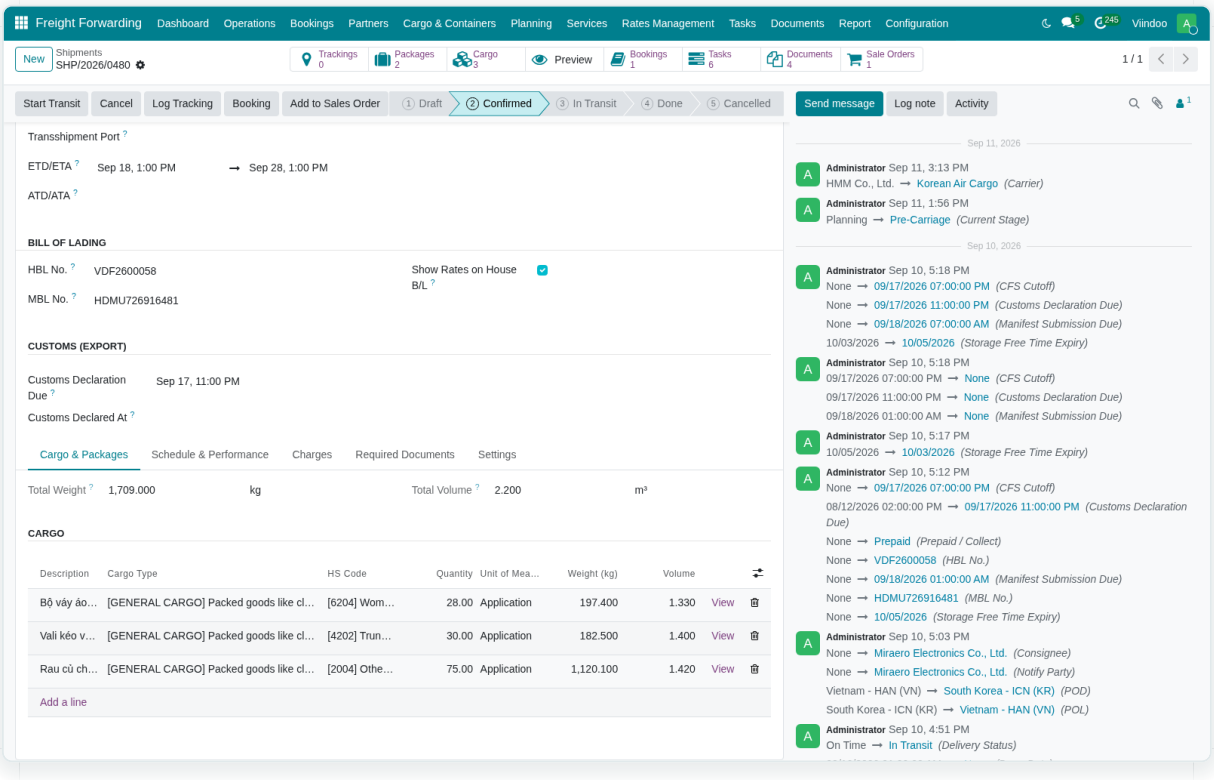


You should see: at the top of the record, **Main Transport** is *Air* and **Shipment Type** is *Loose*; the **Tasks** button already shows 7 tasks taken from the template. The flight leg is in the **Schedule & Performance** tab. The **Charges** tab (the charge lines) appears only after you click **Confirm** on the shipment.

Fill in **Customer**, **Shipper**, **Consignee**, **Carrier** (an airline), **Incoterm**, **ETD/ETA**, save, then click **Confirm**.

Step 3 - Chargeable weight

Open the **Cargo & Packages** tab and add a line to the **CARGO** table if you want to describe the goods. An air shipment has no package-entry block in this tab: click the **Packages** stat button at the top of the record, click **New** and fill in **Package Reference**, **Package Type**, **Weight (kg)**, **Volume (m³)** (for example 180 kg and 1.7 m3), then click **Save** and return to the shipment.

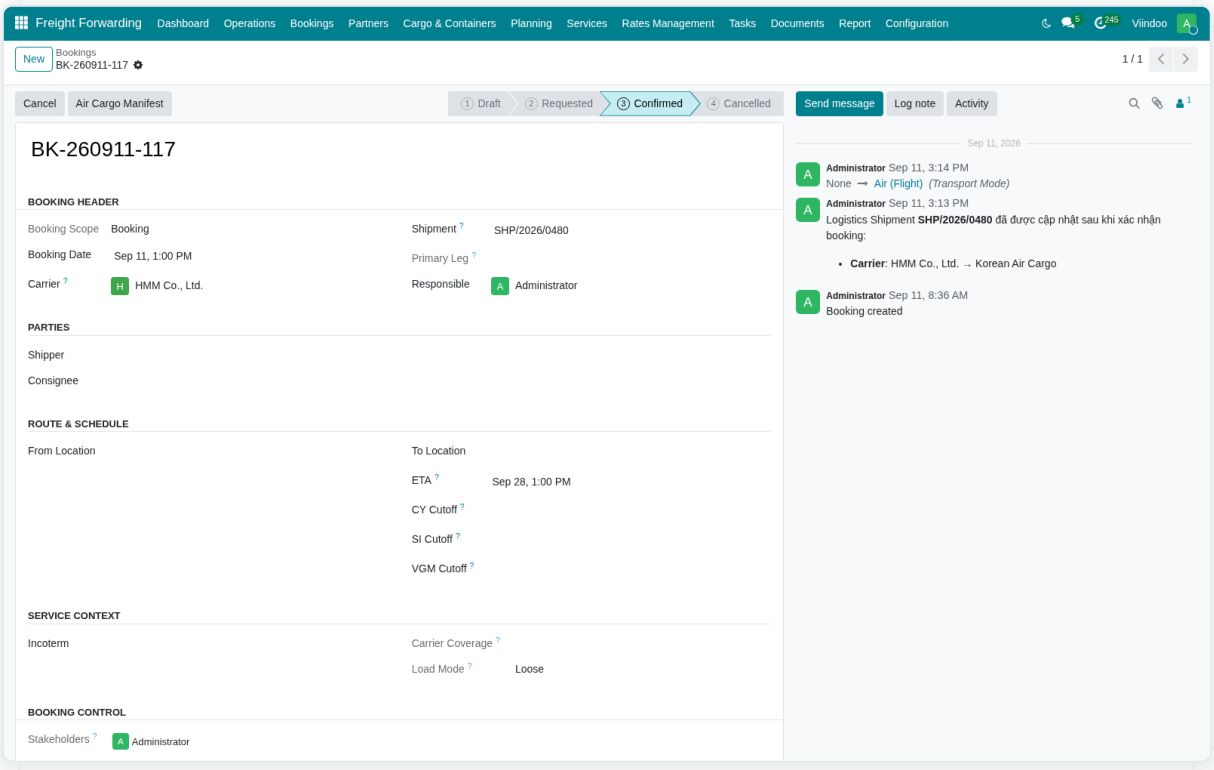


You should see: the shipment's **Total Weight** and **Total Volume**, calculated from the packages (with the example above, 180 kg and 1.7 m3), together with the cargo line you entered. The screenshot shows a different sample shipment with several cargo lines, totalling 1,709 kg and 2.2 m3.

> **Chargeable weight is calculated, but it is not shown on this screen.** The system calculates the *volumetric weight* and the *chargeable weight* for every air shipment - for example shipment `SHP/2026/0475` (and the shipment you just entered above) weighs **180 kg** actual, with a volume of 1.7 m3, so the volumetric weight is **283.9 kg**, and the airline charges on **283.9 kg**. These two figures do not appear on the shipment record; they are printed only on the air cargo manifest template (the **Air Cargo Manifest** button of the booking form).
>
> **Why it matters:** a 30 kg carton of clothes that takes up 1 m3 will be charged as 167 kg. A salesperson who misreads this field loses money on that very order.

Step 4 - Book with the airline

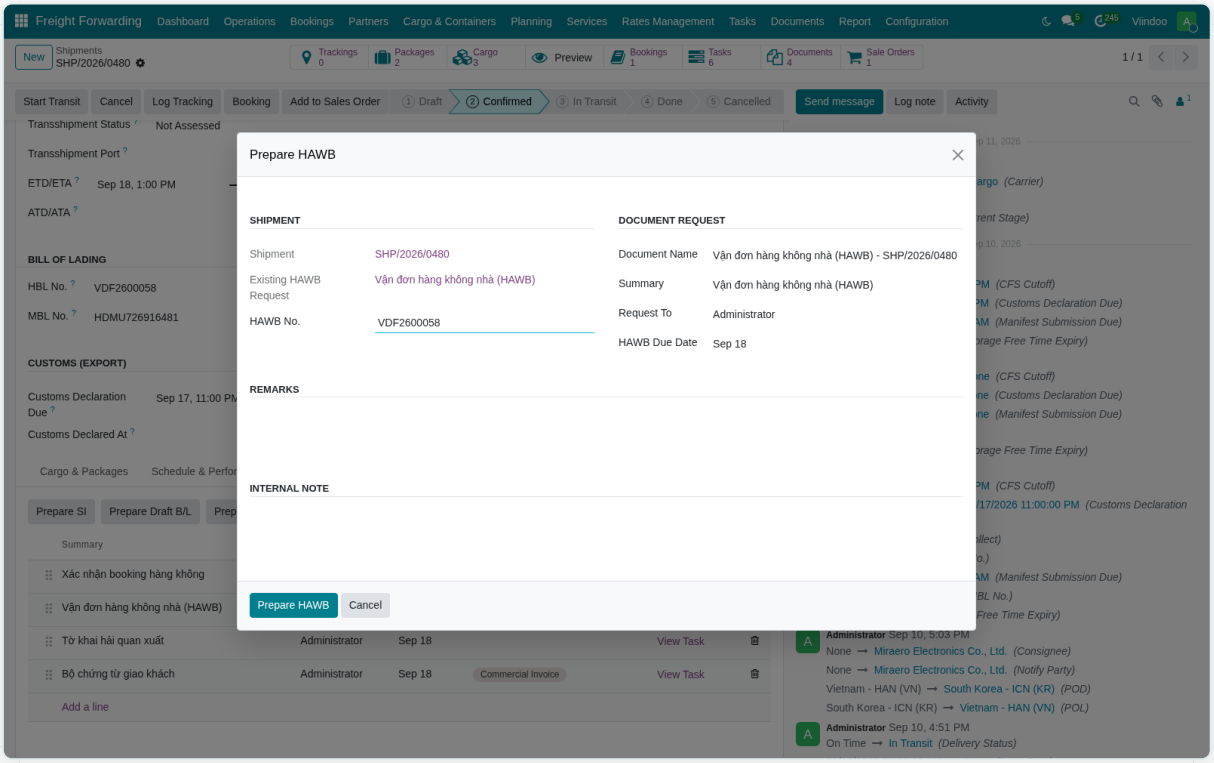
Click **Booking**. The **Create Booking** wizard has the shipment and the airline already filled in; in **Requested Details** click **Add a line**, fill in **Package Type**, **Quantity**, **Commodity**, **Weight**, **Volume** (the wizard also creates a matching cargo line on the shipment), then click **Create**. Move the form through **Mark as Requested** and **Mark as Confirmed** as in Lesson 2.



You should see: an air booking form in the **Confirmed** status, with the **Air Cargo Manifest** button; you can find it again under `Freight Forwarding > Bookings > Air > Air Bookings`.

Step 5 - Prepare the house air waybill

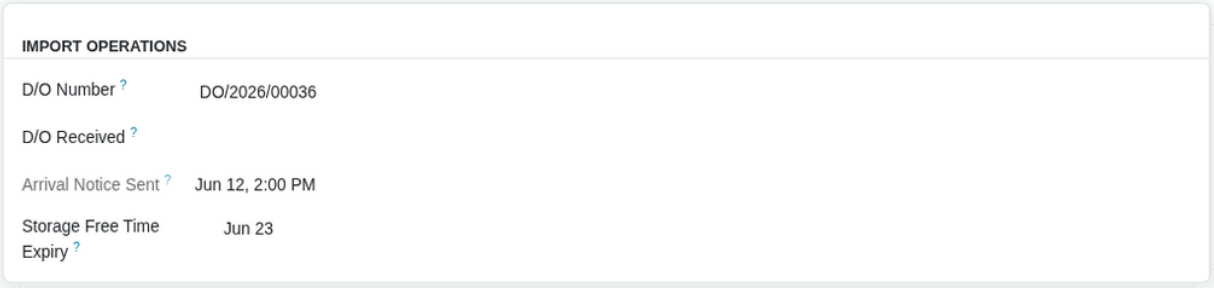
On the air shipment, open the **Required Documents** tab and click **Prepare HAWB**.



You should see: the **Prepare HAWB** dialog with the shipment and the **Document Name** (the document title followed by the shipment number) already filled in; fill in **HAWB No.**, **Request To**, **HAWB Due Date**, then click **Prepare HAWB** to create the document request.

Step 6 - Air delivery order

For an **import** shipment, the delivery order milestones are in the **IMPORT OPERATIONS** block right on the shipment record (the screenshot was taken from an existing import shipment of the demo system). The button that issues the order is **Issue Air D/O**, located in the **Required Documents** tab, and it appears only for an import air shipment that has no D/O number yet.



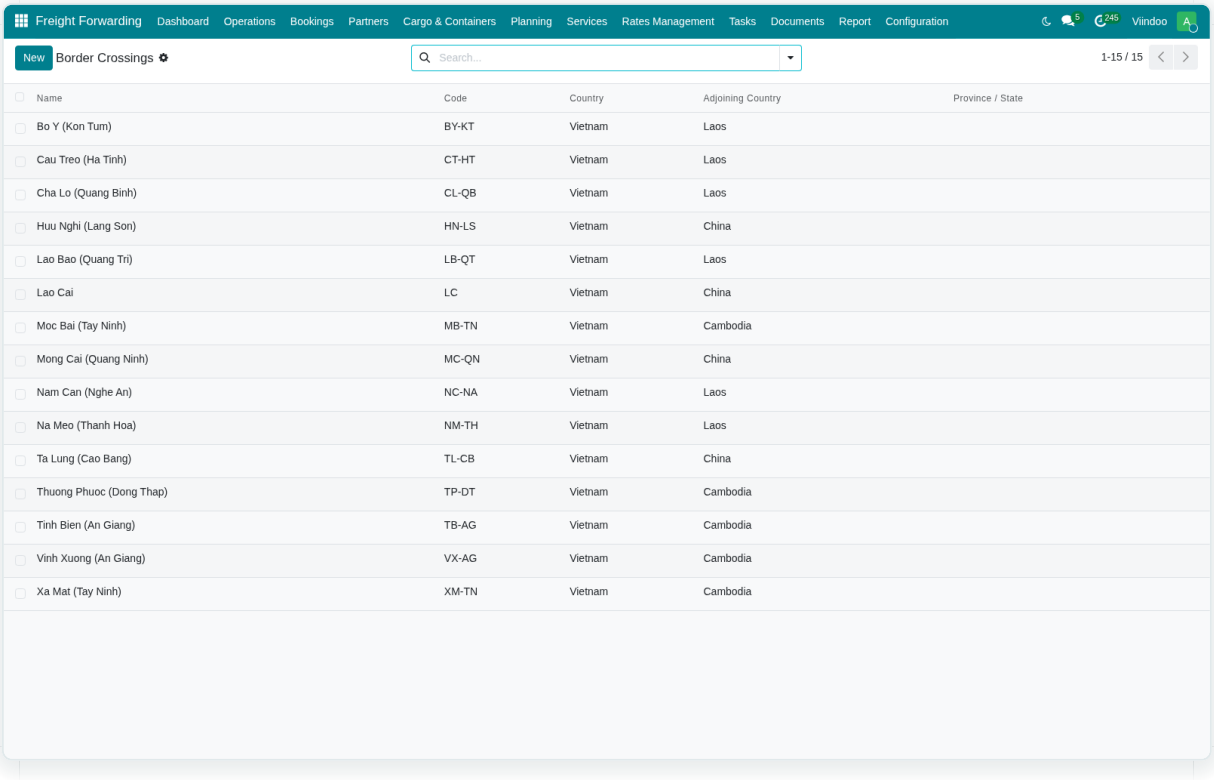
You should see: the **D/O Number** has been issued, together with the fields **D/O Received**, **Arrival Notice Sent** and **Storage Free Time Expiry** - the milestones that the import documentation team follows every day.

08 ROAD FREIGHT ACROSS THE BORDER

About 10 minutes. Cross-border road transport has two things that sea and air do not: **border crossings** and **trucks**.

Step 1 - Look at the border crossing list

Go to `Freight Forwarding > Configuration > Locations > Ports > Border Crossings`.

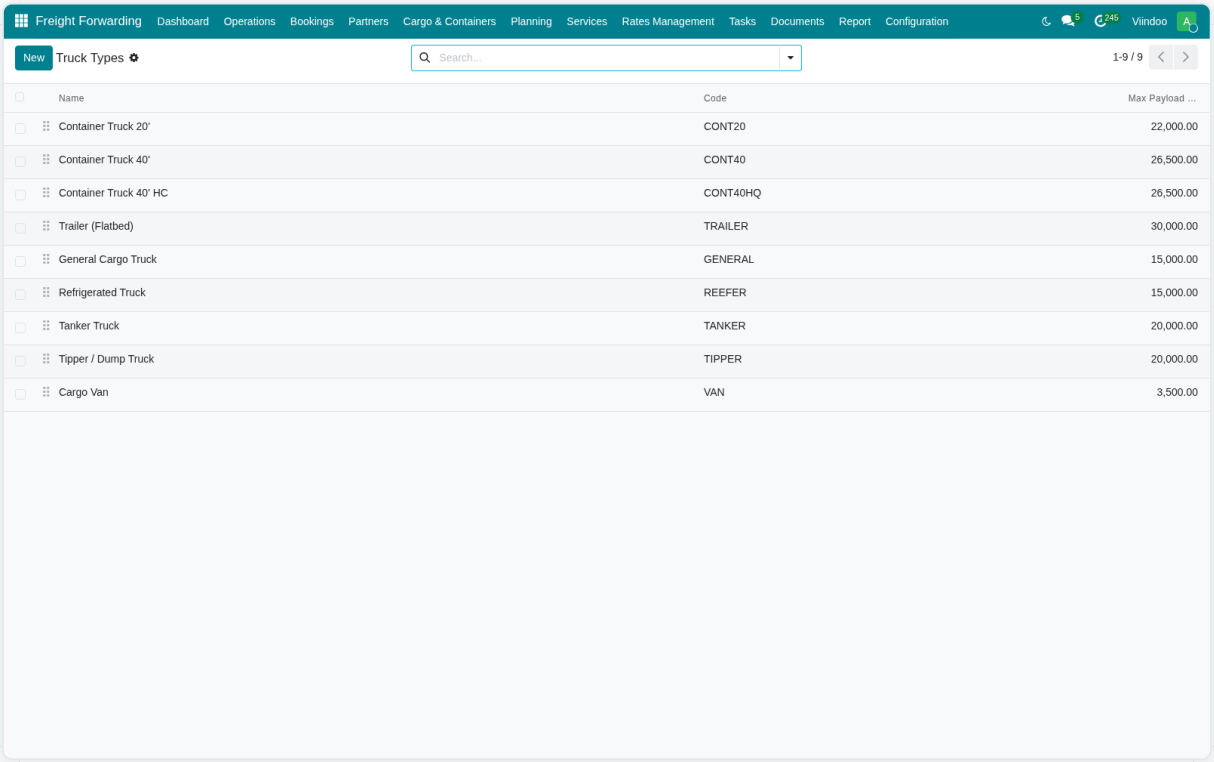


Name	Code	Country	Adjoining Country	Province / State
Bo Y (Kon Tum)	BY-KT	Vietnam	Laos	
Cau Treo (Ha Tinh)	CT-HT	Vietnam	Laos	
Cha Lo (Quang Binh)	CL-QB	Vietnam	Laos	
Huu Nghi (Lang Son)	HN-LS	Vietnam	China	
Lao Bao (Quang Tri)	LB-QT	Vietnam	Laos	
Lao Cai	LC	Vietnam	China	
Moc Bai (Tay Ninh)	MB-TN	Vietnam	Cambodia	
Mong Cai (Quang Ninh)	MC-QN	Vietnam	China	
Nam Can (Nghe An)	NC-NA	Vietnam	Laos	
Na Meo (Thanh Hoa)	NM-TH	Vietnam	Laos	
Ta Lung (Cao Bang)	TL-CB	Vietnam	China	
Thuong Phuoc (Dong Thap)	TP-DT	Vietnam	Cambodia	
Tinh Bien (An Giang)	TB-AG	Vietnam	Cambodia	
Vinh Xuong (An Giang)	VX-AG	Vietnam	Cambodia	
Xa Mat (Tay Ninh)	XM-TN	Vietnam	Cambodia	

You should see: 15 road border crossings, each row with **Name**, **Code**, **Country**, **Adjoining Country**, **Province / State**.

Step 2 - Look at the truck type list

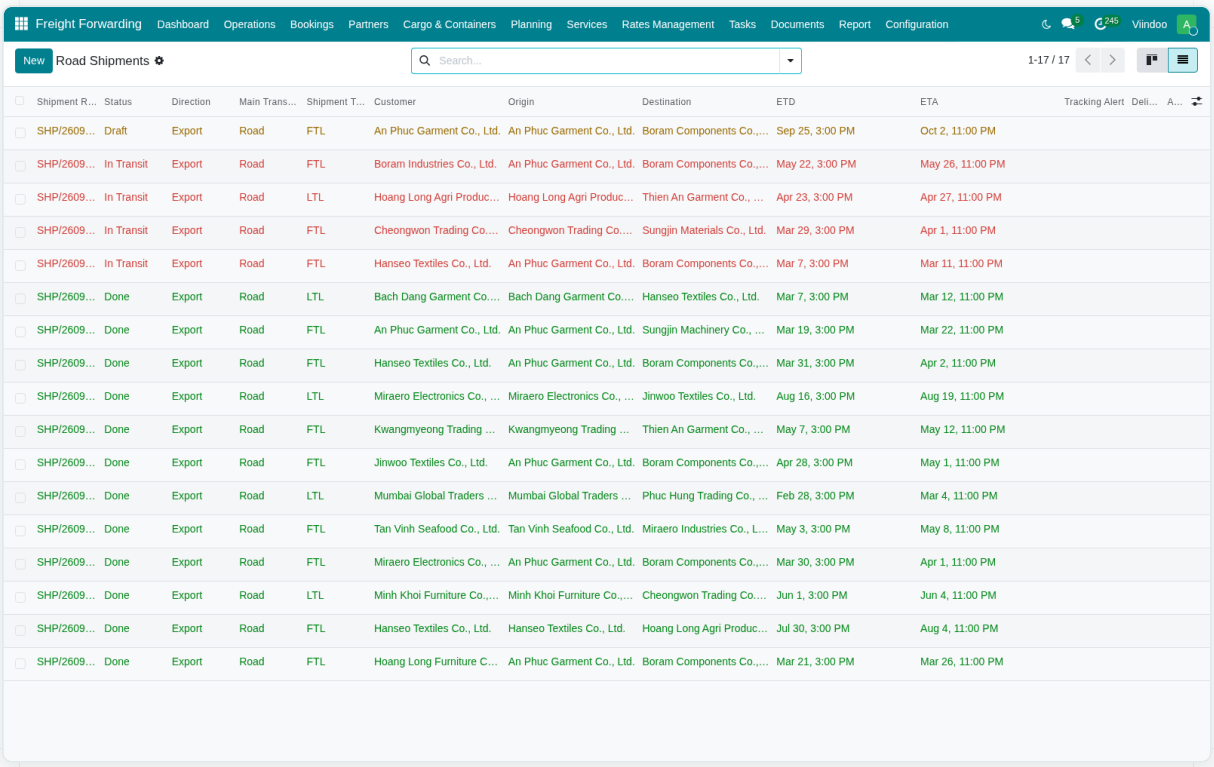
Go to `Shipment Management > Configuration > Other > Truck Types`.



You should see: 9 truck types, each with its own **Code** and **Max Payload (kg)**.

Step 3 - Look at the road shipments

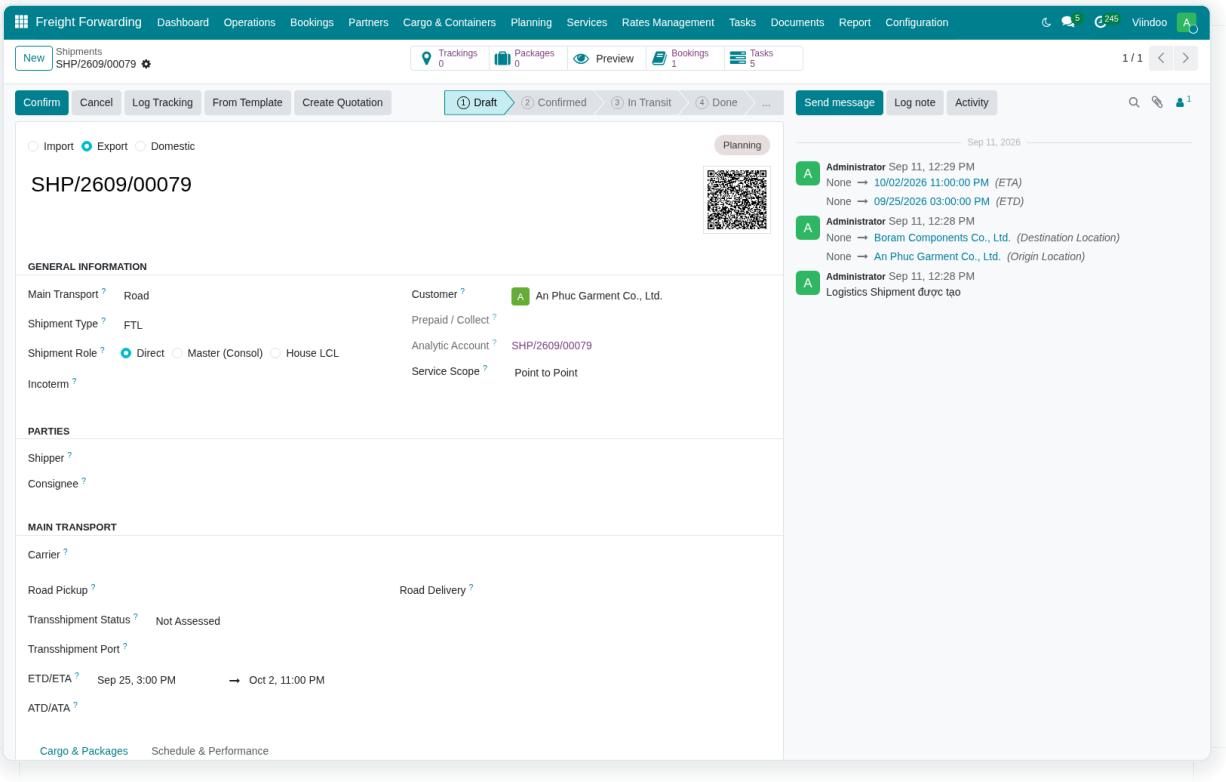
Go to `Freight Forwarding > Operations > Road > Road Shipments`.



You should see: about 17 shipments running by road across a border (**Main Transport** is *Road*).

Step 4 - Create a road shipment from the template

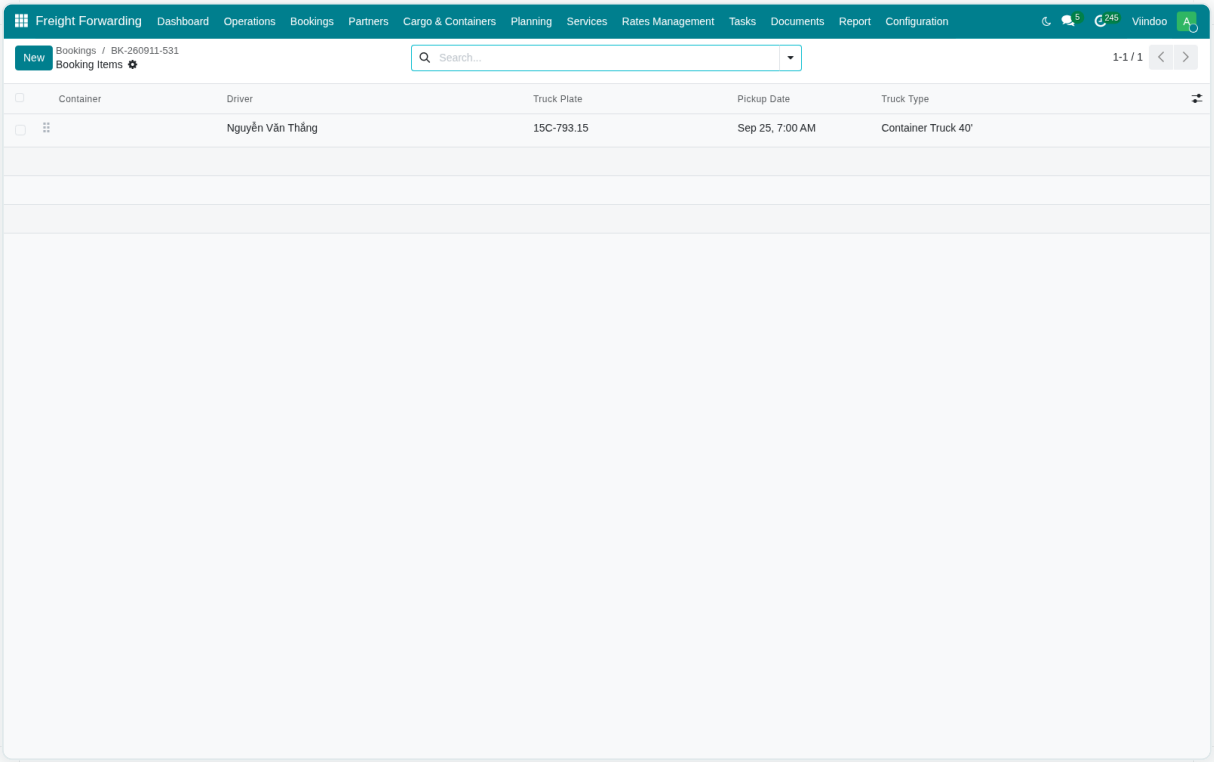
Click **New**, click **From Template**, choose **MẪU - Đường bộ qua cửa khẩu** (the cross-border road template), click **Apply**.



You should see: at the top of the record, **Main Transport** is *Road* and **Shipment Type** is *FTL*; in place of the sea POL/POD there are two fields, **Road Pickup** and **Road Delivery**. The border crossing leg is in the **Schedule & Performance** tab; the shipment has 2 charge lines and 5 tasks from the template, and the **Charges** tab appears after the shipment is confirmed.

Step 5 - Enter the truck and the driver

The truck and driver are **not entered on the leg** but on the **road booking form**. Fill in **Customer**, **Shipper**, **Consignee**, **Carrier** (a road haulier), **Incoterm**, **ETD/ETA**, save, click **Confirm**, click **Booking** and then **Create**. On the form you just created click **Mark as Requested** and **Mark as Confirmed** - a **Truck Items** stat button showing 1 appears. Click it, open the truck line and fill in the fields; click **Save**.



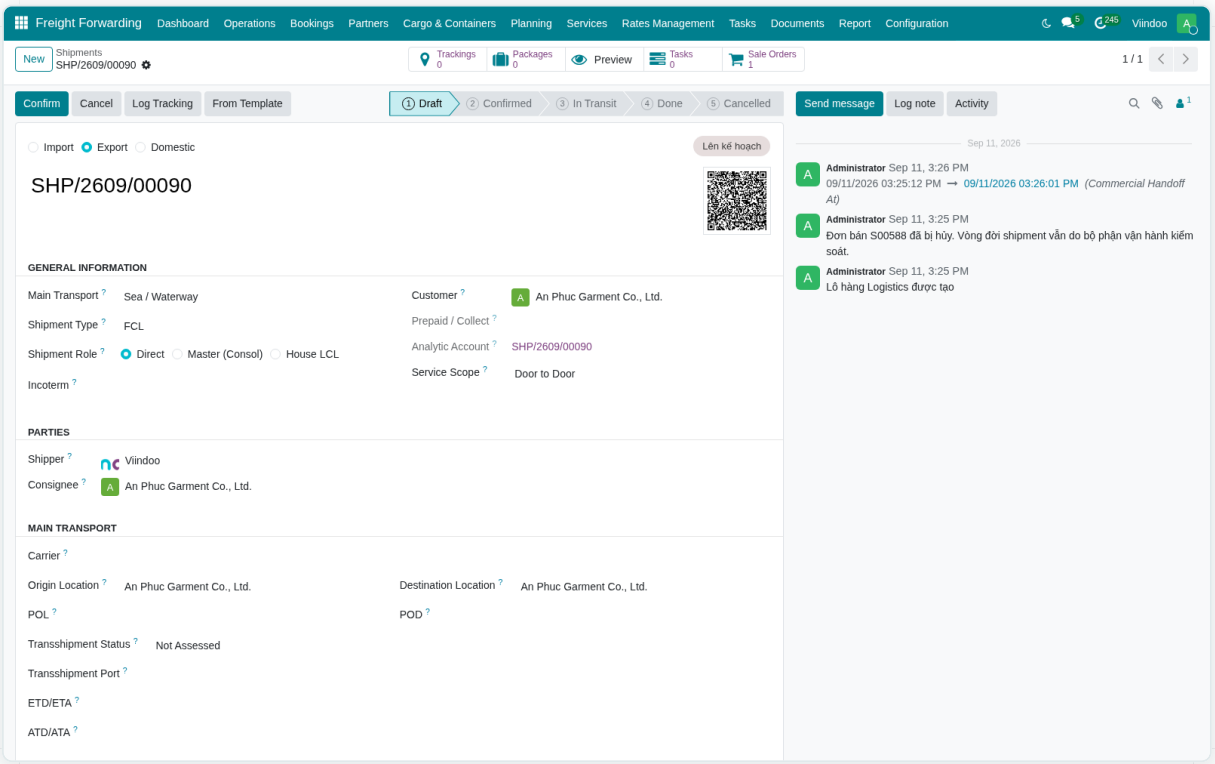
You should see: one line per truck trip, with **Driver** (pick a contact), **Truck Plate**, **Pickup Date** and **Truck Type** - the truck type is taken from the list in Step 2. This is the data printed on the **Delivery Note** and the **Cargo Manifest**, two buttons sitting right on the form's button bar.

09 FROM QUOTATION TO PROFIT AND LOSS PER SHIPMENT

About 25 minutes. This part is for the decision-maker. This lesson goes from a newly created shipment, through the quotation, the customer invoice and the vendor bill, to the real profit figure of that very shipment. You do not need to do Lesson 1 first, and a shipment created in another lesson does not affect this one.

Step 1 - Create a new shipment and apply the template

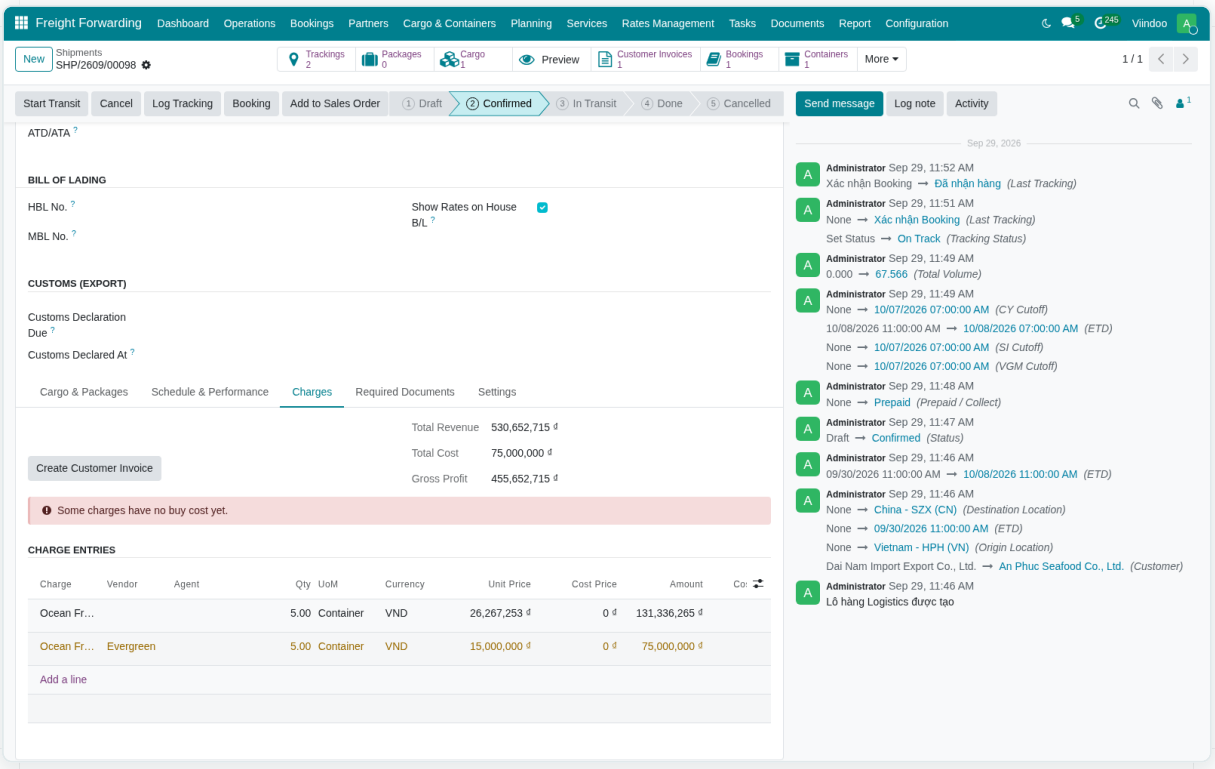
Go to `Freight Forwarding > Operations > All Shipments`, click **New**, click **From Template**, choose **MẪU - FCL xuất khẩu đường biển (Hải Phòng - Busan)**, click **Apply**. Fill in **Customer**, **Shipper**, **Consignee**, **Carrier**, **ETD**, **ETA**, then click **Confirm**.



You should see: the status **Confirmed**. The **Charges** tab appears only once the shipment is past Draft.

Step 2 - Enter the cost price and vendor for the charge lines

Open the **Charges** tab.



You should see: six charge lines taken from the template, each with a **Unit Price** (selling) and a **Cost Price** (cost). The **Cost Price** column is 0 and the **Vendor** column is empty. The screenshot shows another sample shipment with only two charge lines; note the red banner *Some charges have no buy cost yet.*, which reminds you of exactly this gap.

> **One thing to do by hand.** The template wizard copies the selling price but **does not copy the cost price** or the vendor. If you leave it as is, every line has a cost of 0, the gross margin shows 100%, and the vendor bill in Step 8 does not carry the right amounts. So fill in these two columns before you go on.

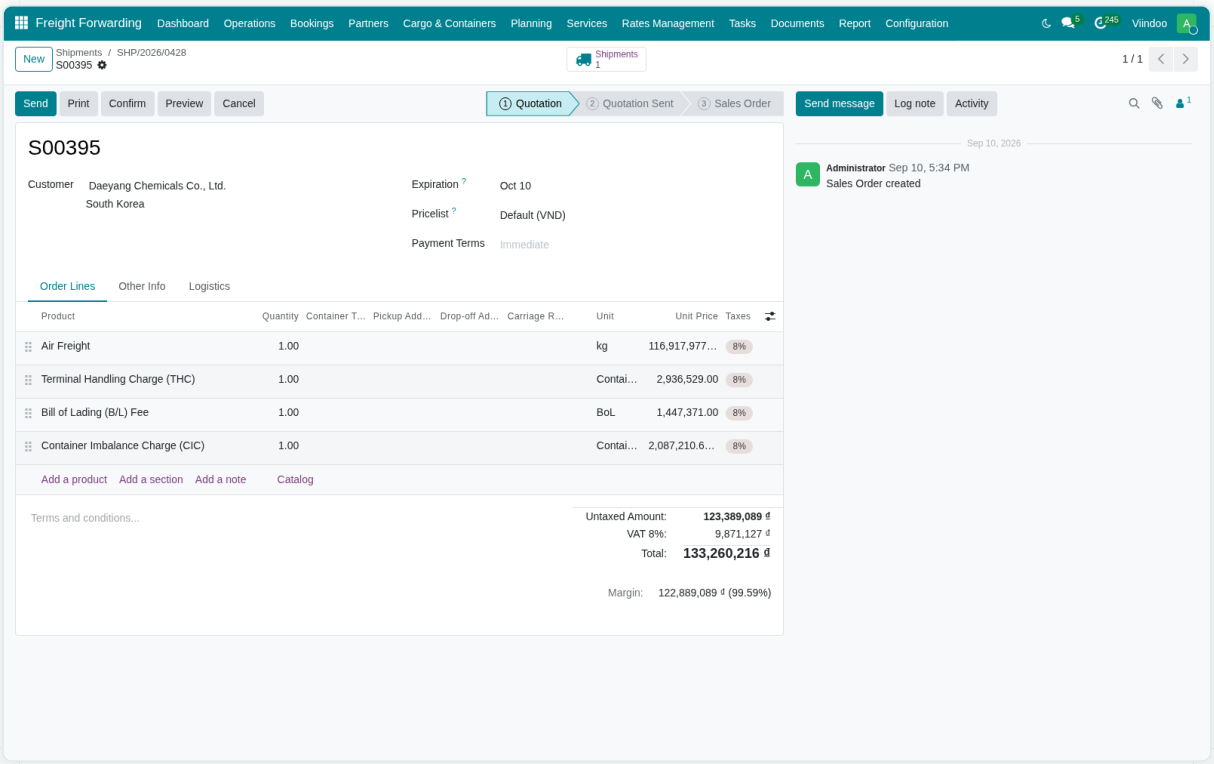
For each line, choose a **Vendor** (for example the shipping line you picked) and enter the **Cost Price**. A suggested set of numbers:

Charge line	Quantity	Cost Price
Customs Clearance Service (Export)	1	2,500,000
Terminal Handling Charge (THC)	1	1,800,000
Bill of Lading (B/L) Fee	1	600,000
Seal Fee	2	250,000
Ocean Freight - FCL	2	20,000,000
Container Imbalance Charge (CIC)	2	1,500,000

You should see: the three totals above: **Total Revenue**, **Total Cost**, **Gross Profit**. With the numbers above, **Total Cost** is 48,400,000 VND. Revenue follows the template's selling prices (when checked it was 65,999,849 VND, so **Gross Profit** was 17,599,849 VND). The margin appears from the moment you quote, not at the end of the month.

Step 3 - Generate a quotation from the charge lines

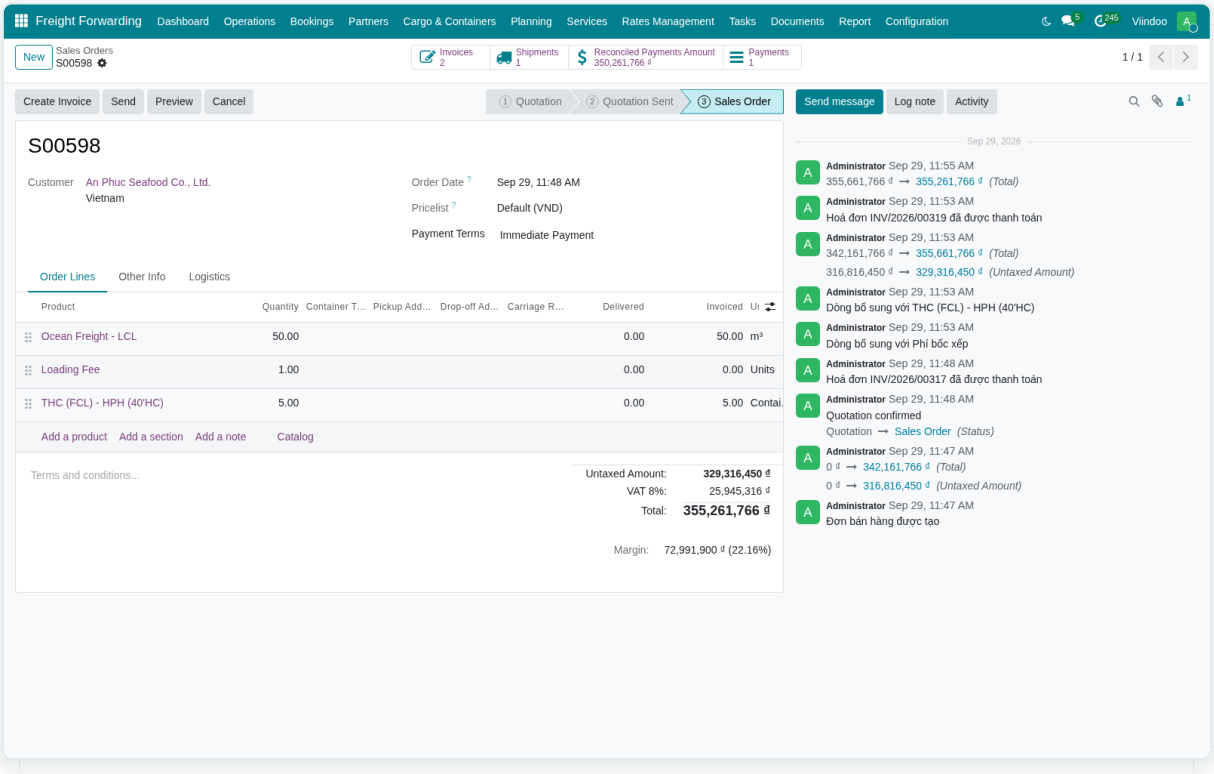
Click **Create Quotation** on the shipment's button bar.



You should see: a sales order in the **Quotation** status is built, each charge line becomes an order line, and the shipment has a **Sale Orders** stat button linking to that order. The order total includes tax, so it is larger than the shipment's **Total Revenue** (the screenshot, from another sample order, shows 123,389,089 VND untaxed and 133,260,216 VND with 8% VAT).

Step 4 - Confirm the sales order

Open the sales order and click **Confirm**.

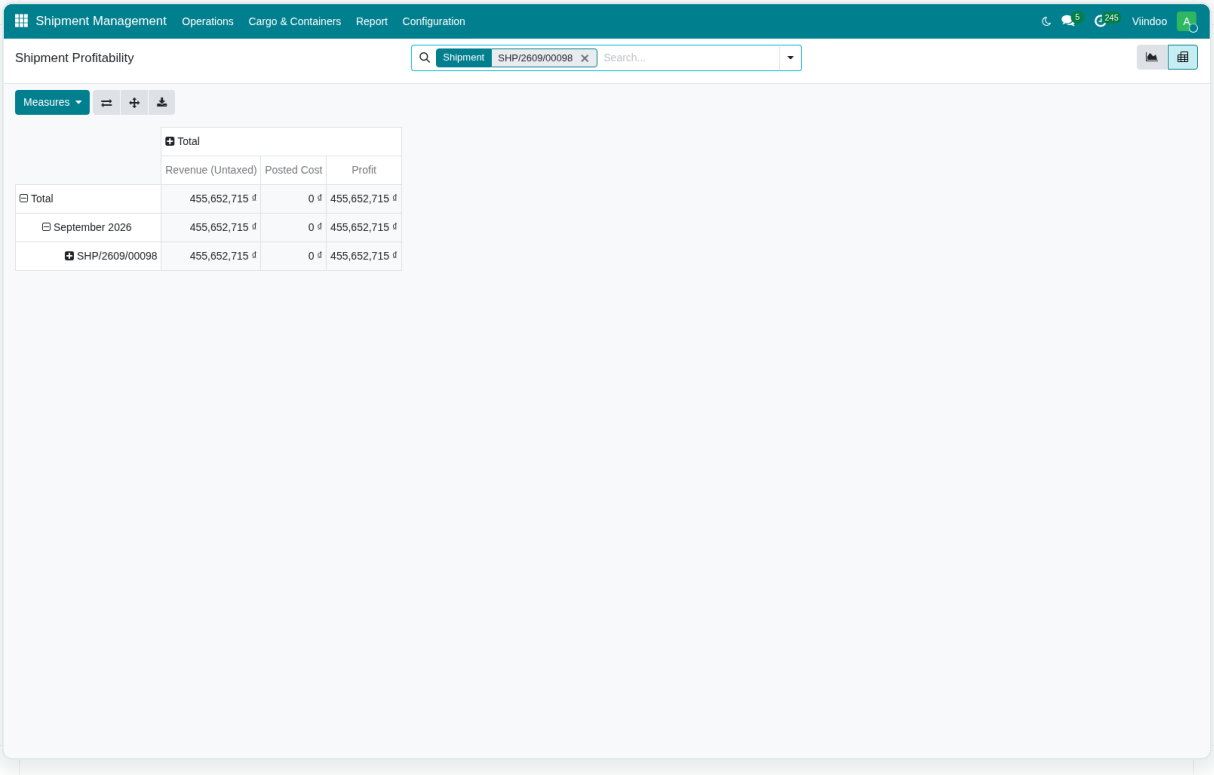


You should see: the order moves to the **Sales Order** status.

Step 5 - Understand how the report computes profit before you read the numbers

Go to `Shipment Management > Report > Shipment Statistics > Shipment Profitability`.

This report has **only two views: chart and pivot** - there is no list view. Click the pivot icon in the top right corner. Type the name of your shipment into the search box and pick the search option for **Shipment** from the suggestions, so that the report shows only your company's shipment.



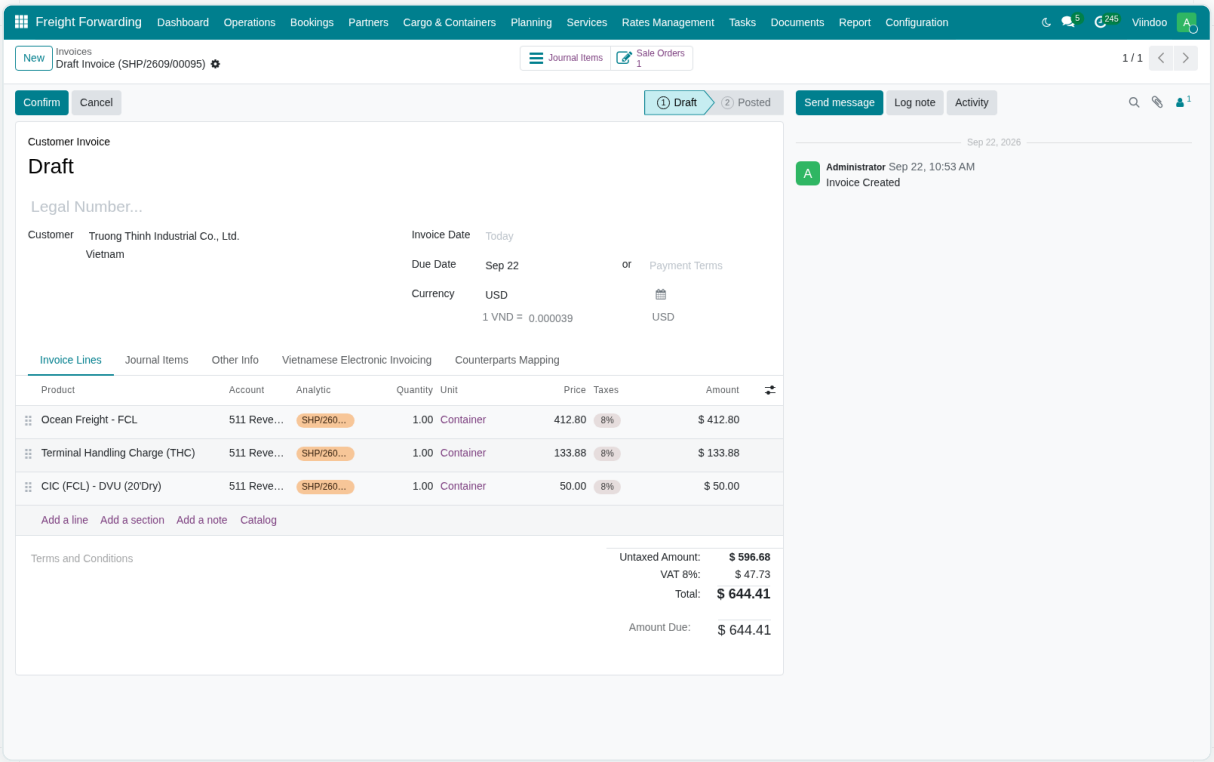
You should see: revenue equal to the shipment's **Total Revenue** (**Revenue (Untaxed)**), **Posted Cost** at 0 and **Profit** equal to exactly the revenue - a 100% margin (the screenshot shows another sample shipment: 455,652,715 VND for both). That is because no vendor bill has been posted against the cost yet. How the report computes each figure:

Figure	Where it comes from
Revenue	the sales order lines tied to the shipment, **ignoring any line that has nothing to invoice yet**
Cost	the **negative analytic entries** on the shipment's account - that is, from posted vendor bills, not from the cost price typed on the charge line
Profit	revenue minus cost

> **A consequence worth knowing:** a shipment in progress usually shows a better margin than reality, because revenue is recognised when the order is confirmed while the cost has to wait for the vendor bill to arrive. The figure is only fully right once the shipment is closed at both ends.
>
> **A note on the time axis.** The **Date** column of this report follows the **creation date of the shipment record**, not the sailing date. When you group by month, shipments created in the same month fall into the same column. Group by **Shipment**, **Customer** or **Shipment Type** - these axes give the clearest meaning.

Step 6 - Invoice the customer

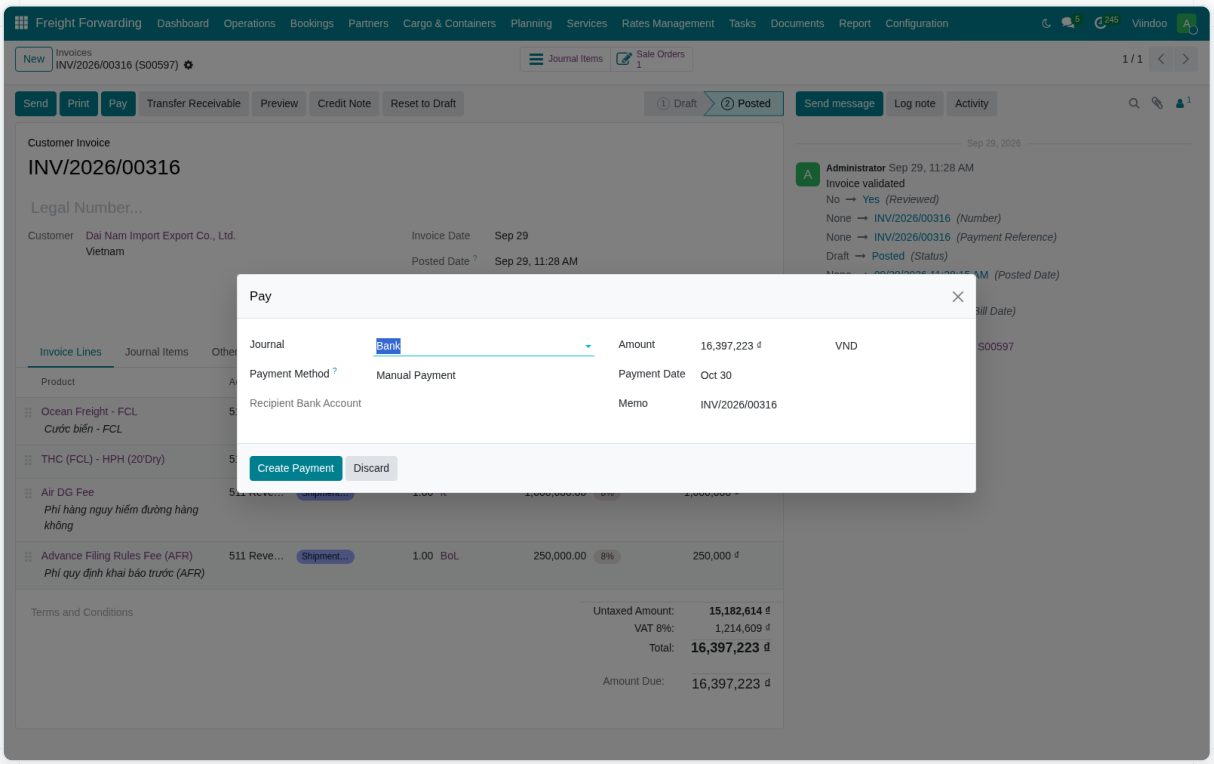
Go back to the shipment, open the **Charges** tab and click **Create Customer Invoice**.



You should see: a **Draft Invoices** stat button showing 1 appears on the shipment; click it to open a draft invoice. The system groups charge lines by **pair of customer and currency**, so each invoice has a single currency, and there is a mechanism to prevent duplicate invoicing.

Step 7 - Post the invoice and collect payment

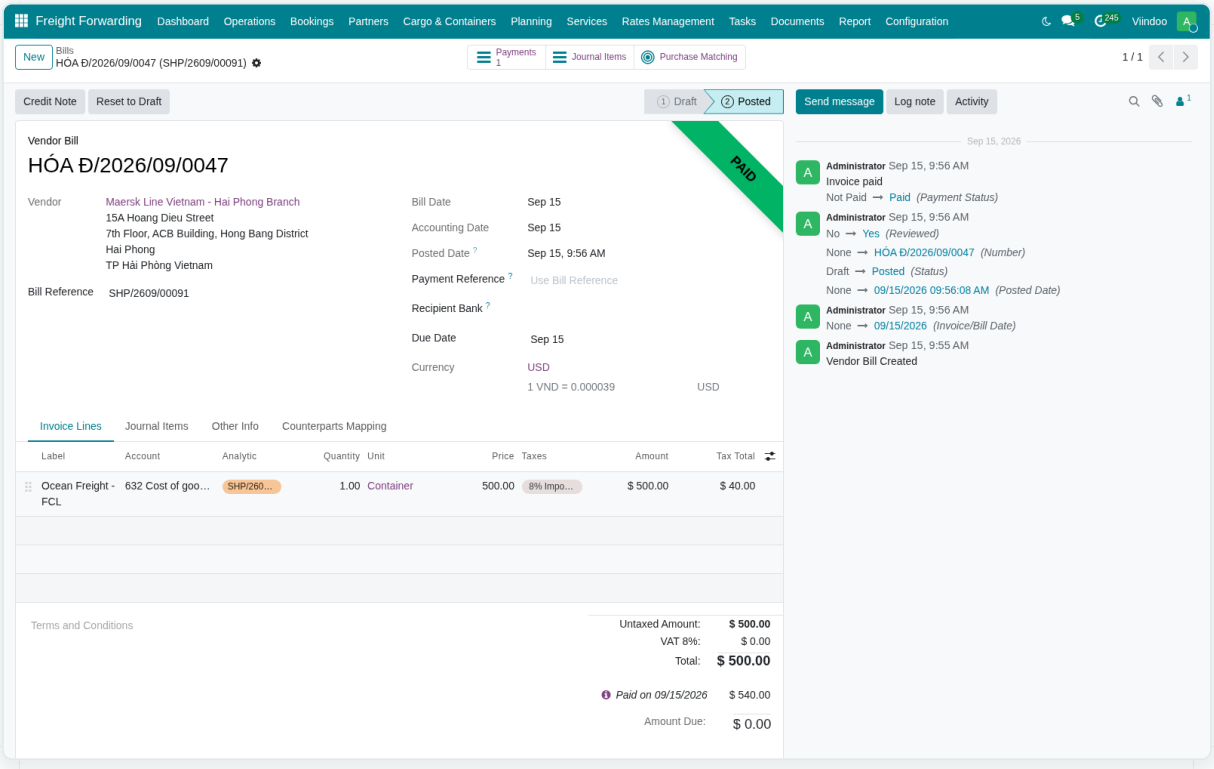
Open the invoice, click **Confirm**, then click **Pay** and in the dialog click **Create Payment**.



You should see: the invoice has a number (of the form INV/...), and after payment it carries the **Paid** stamp. On the shipment, the **Customer Invoices** stat button shows 1.

Step 8 - Record the cost from the vendor

Back on the shipment, still in the **Charges** tab, click **Create Vendor Bill**. Click the **Draft Bills** stat button to open the vendor bill. Fill in **Bill Date** (for example today), then click **Confirm**. If a **Confirm Entries** dialog appears warning that an amount lies outside the typical range, click **Confirm** again.

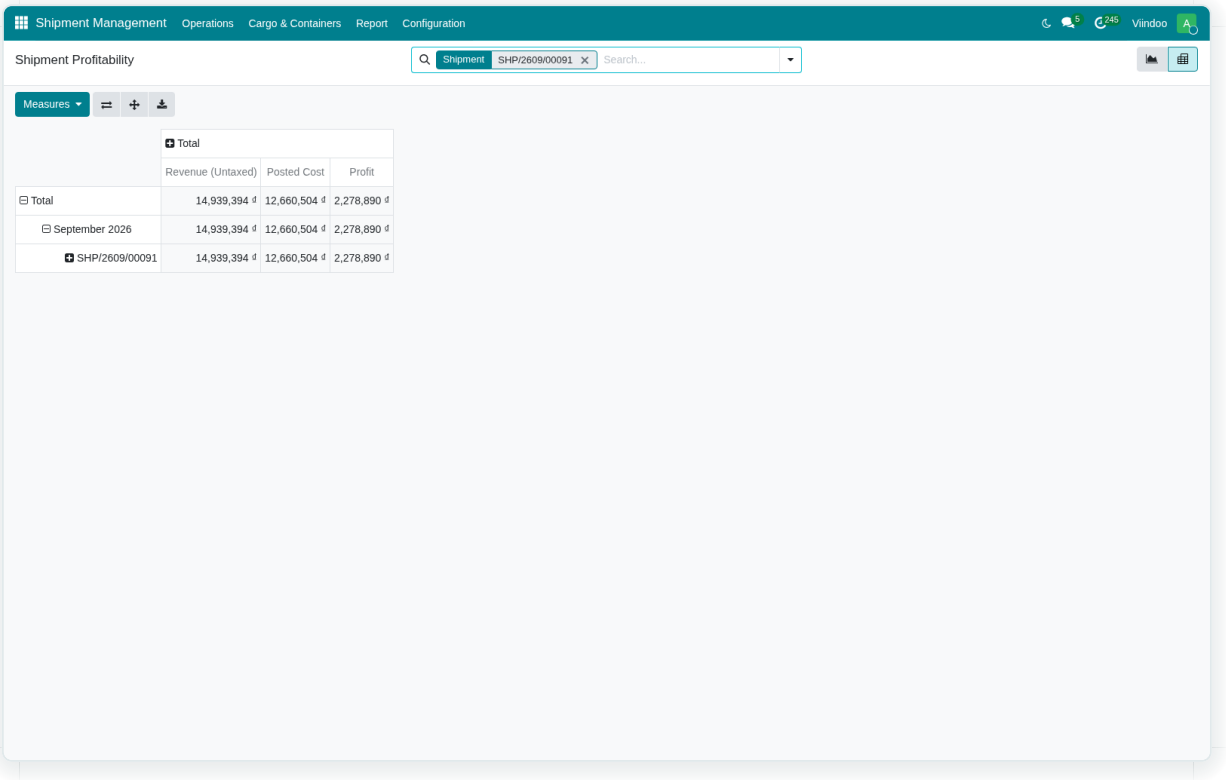


You should see: the vendor bill has each line at exactly the **Cost Price** you entered (a total of 48,400,000 VND with the suggested numbers) and carries the shipment's analytic account. After confirming, the bill has a number and the shipment's **Vendor Bills** stat button shows 1. The screenshot shows an older sample bill that has already been posted and settled.

> If you forget to fill in **Bill Date**, the system refuses to confirm and says a bill date is required.

Step 9 - See the real profit of the shipment

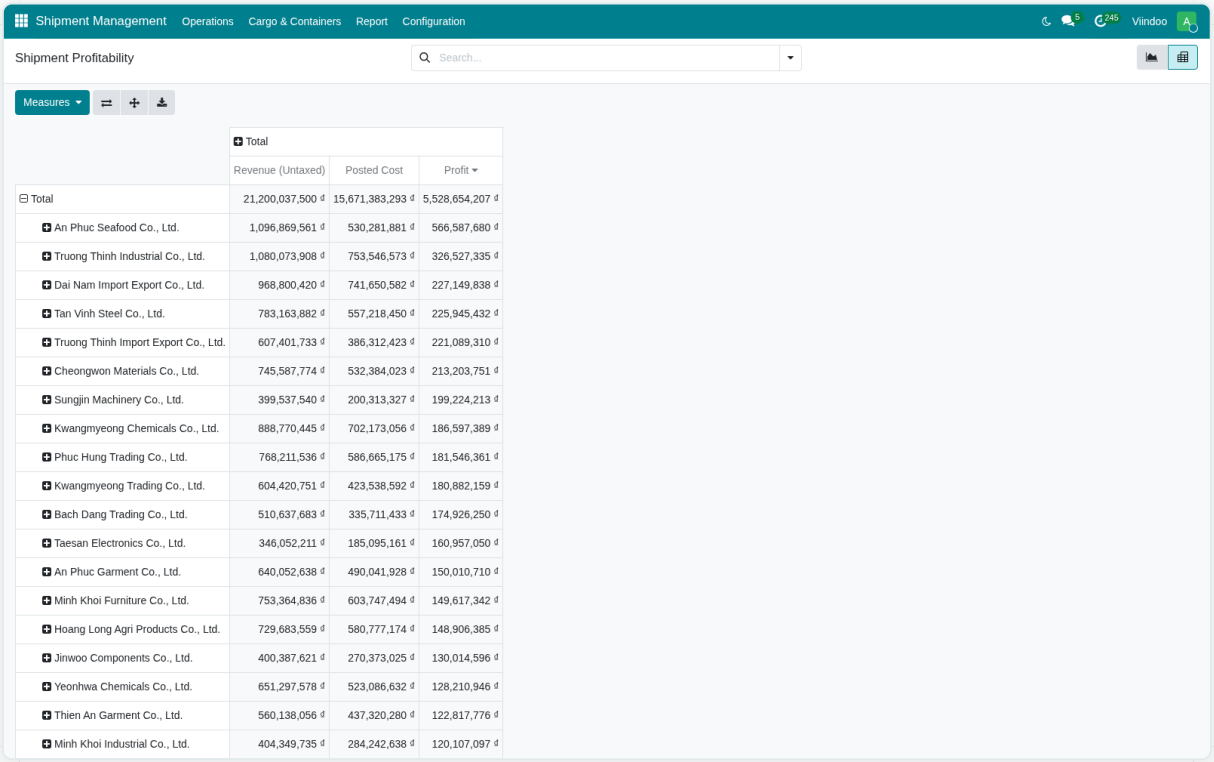
Return to the **Shipment Profitability** report, still in pivot view and still filtered to your shipment. Click the **+** sign at the start of the row to expand the shipment by **Shipment Type**.



You should see: the **Posted Cost** column now has a number (48,400,000 VND with the suggested numbers) and **the real profit of the shipment appears** (when checked: 17,599,849 VND, a 26.67% margin), matching the **Gross Profit** on the shipment. The screenshot shows a different sample shipment: 14,939,394 VND revenue, 12,660,504 VND posted cost, 2,278,890 VND profit.

Step 10 - See the big picture

Remove the shipment filter, change **Group By** to **Customer**, then try **Shipment Type**.

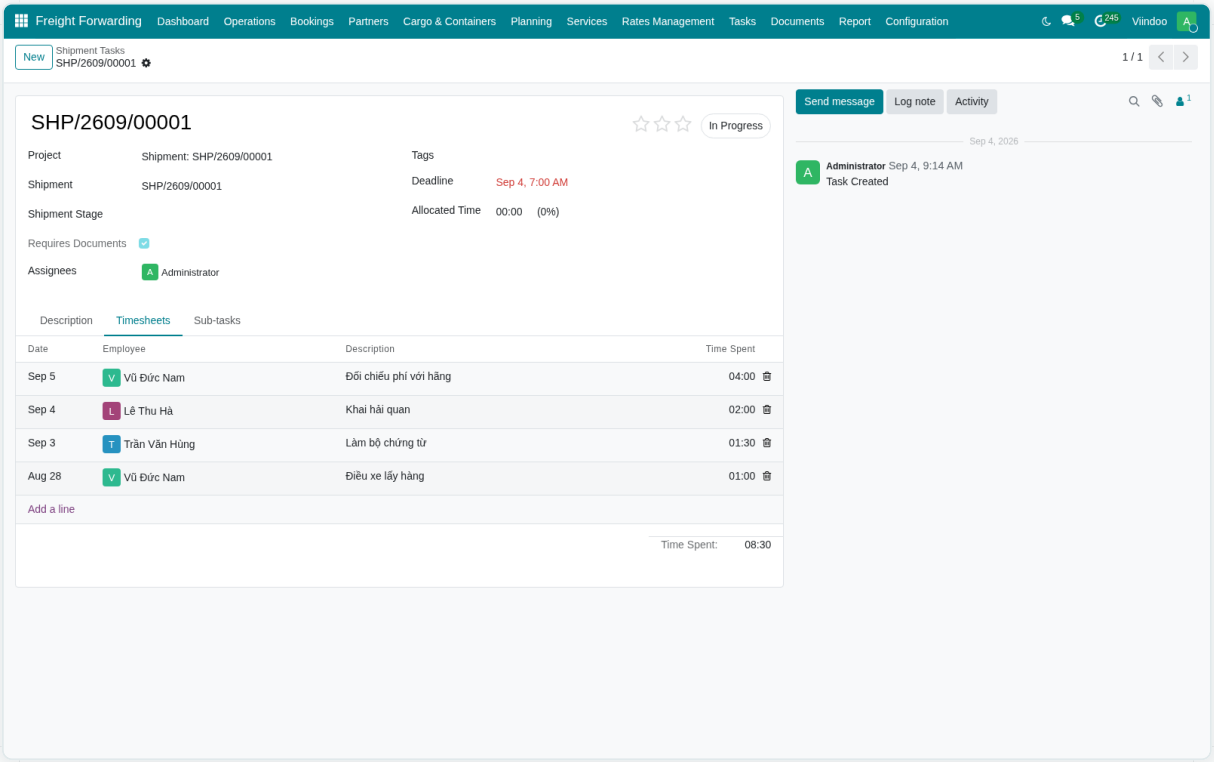


	Total		
	Revenue (Untaxed)	Posted Cost	Profit
Total	21,200,037,500 ₫	15,671,383,293 ₫	5,528,654,207 ₫
An Phuc Seafood Co., Ltd.	1,096,869,561 ₫	530,281,881 ₫	566,587,680 ₫
Truong Thinh Industrial Co., Ltd.	1,080,073,908 ₫	753,546,573 ₫	326,527,335 ₫
Dai Nam Import Export Co., Ltd.	968,800,420 ₫	741,650,582 ₫	227,149,838 ₫
Tan Vinh Steel Co., Ltd.	783,163,882 ₫	557,218,450 ₫	225,945,432 ₫
Truong Thinh Import Export Co., Ltd.	607,401,733 ₫	386,312,423 ₫	221,089,310 ₫
Cheongwon Materials Co., Ltd.	745,587,774 ₫	532,384,023 ₫	213,203,751 ₫
Sungjin Machinery Co., Ltd.	399,537,540 ₫	200,313,327 ₫	199,224,213 ₫
Kwangmyeong Chemicals Co., Ltd.	888,770,445 ₫	702,173,056 ₫	186,597,389 ₫
Phuc Hung Trading Co., Ltd.	768,211,536 ₫	586,665,175 ₫	181,546,361 ₫
Kwangmyeong Trading Co., Ltd.	604,420,751 ₫	423,538,592 ₫	180,882,159 ₫
Bach Dang Trading Co., Ltd.	510,637,683 ₫	335,711,433 ₫	174,926,250 ₫
Taesan Electronics Co., Ltd.	346,052,211 ₫	185,095,161 ₫	160,957,050 ₫
An Phuc Garment Co., Ltd.	640,052,638 ₫	490,041,928 ₫	150,010,710 ₫
Minh Khoi Furniture Co., Ltd.	753,364,836 ₫	603,747,494 ₫	149,617,342 ₫
Hoang Long Agri Products Co., Ltd.	729,683,559 ₫	580,777,174 ₫	148,906,385 ₫
Jinwoo Components Co., Ltd.	400,387,621 ₫	270,373,025 ₫	130,014,596 ₫
Yeonhwa Chemicals Co., Ltd.	651,297,578 ₫	523,086,632 ₫	128,210,946 ₫
Thien An Garment Co., Ltd.	560,138,056 ₫	437,320,280 ₫	122,817,776 ₫
Minh Khoi Industrial Co., Ltd.	404,349,735 ₫	284,242,638 ₫	120,107,097 ₫

You should see: which routes make money and which customers make money. About 8 shipments are running at a **slight loss** (the **Profit** column is negative) - open them and you will see that most are small LCL house shipments, with little money collected for a lot of work. This is the real story of the trade, and also the reason profit and loss must be measured down to each shipment instead of just looking at total revenue.

Step 11 - Does labour cost enter profit and loss

Go to `Freight Forwarding > Tasks > Shipment Tasks`, open the task **SHP/2609/00001** (an existing shipment of the demo system, view only), then open the **Timesheets** tab.



You should see: four timesheet lines from employees (columns **Date**, **Employee**, **Description**, **Time Spent**; total 08:30). The labour cost of these four lines (1,090,000 VND) is included in the **Posted Cost** of shipment SHP/2609/00001 in the **Shipment Profitability** report. The whole demo system has more than two hundred such timesheet lines.

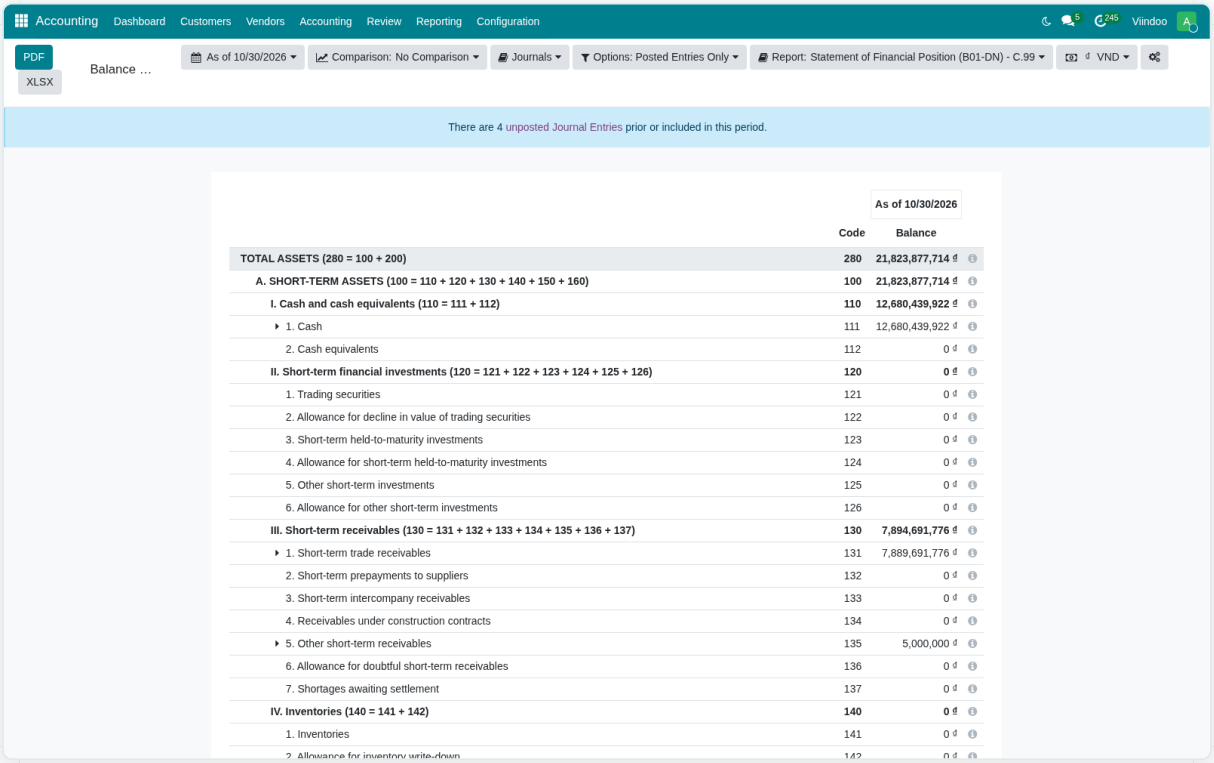
> **A condition to know for a real rollout:** the timesheet line must carry **both the project's analytic account and the shipment's**. The demo system is already configured for the existing tasks. If you only log time normally on the project, the cost stops at the project and does not flow down to the shipment - and users will think the feature does not work. The shipments your company created in the earlier lessons have no timesheet lines yet.

10 FINANCIAL REPORTS TO VIETNAMESE STANDARDS

About 10 minutes. Everything you did in the lessons above ends up in the accounting books. This lesson opens the books.

Step 1 - Balance sheet

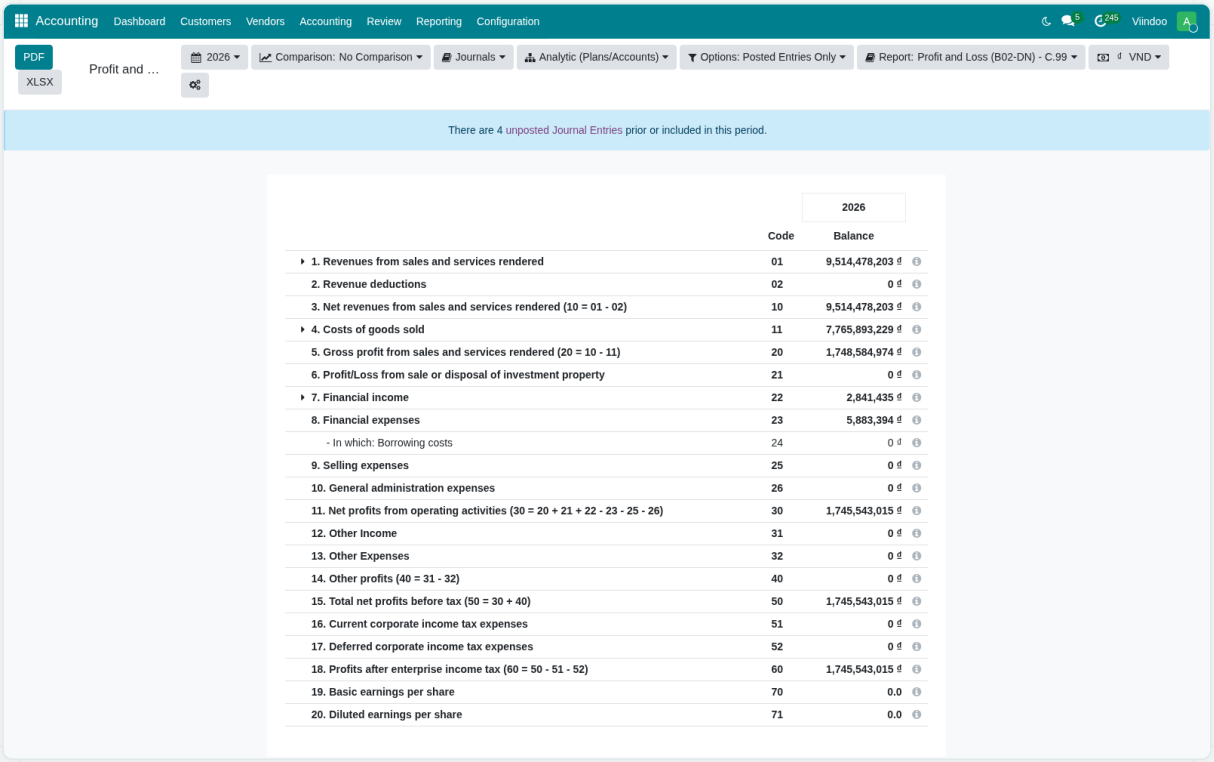
Go to `Accounting > Reporting > Statement Reports > Balance Sheet`.



You should see: a report in the B01-DN format under Circular 99 (the report selector in the top bar shows *Statement of Financial Position (B01-DN) - C.99*), with the two totals **TOTAL ASSETS** and **TOTAL EQUITY AND LIABILITIES**. On this demo system the two totals are not yet equal, so you should not use this report to verify that the books balance; the ledger balances at the journal entry level (see the Appendix).

Step 2 - Income statement

Go to `Accounting > Reporting > Statement Reports > Profit and Loss`.



You should see: revenue, cost of goods sold and profit in the B02-DN format (*Profit and Loss (B02-DN) - C.99*).

Step 3 - A common source of confusion, worth knowing in advance

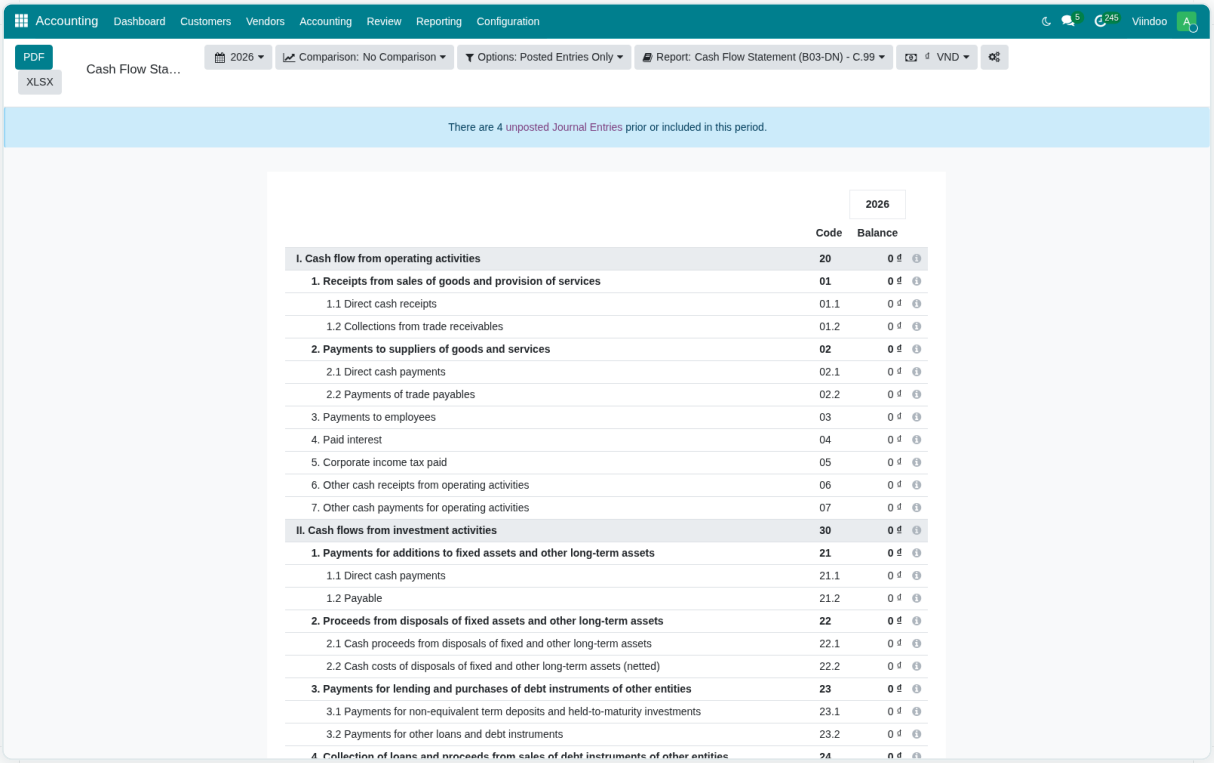
Revenue in the **profit and loss report per shipment** (Lesson 9) and revenue in the **income statement** are not equal. **Both are right:**

Report	What it counts	Who uses it
Profit and loss per shipment	including the part that is **ordered but not yet invoiced**	the operations manager, who needs to know what a shipment is worth while it is still running
Income statement	only the part that is **invoiced and posted**	accounting, because that is the ledger

The difference between the two figures is exactly the work that has been done but not yet invoiced.

Step 4 - Cash flow

Go to `Accounting > Reporting > Statement Reports > Cash Flow Statement`.

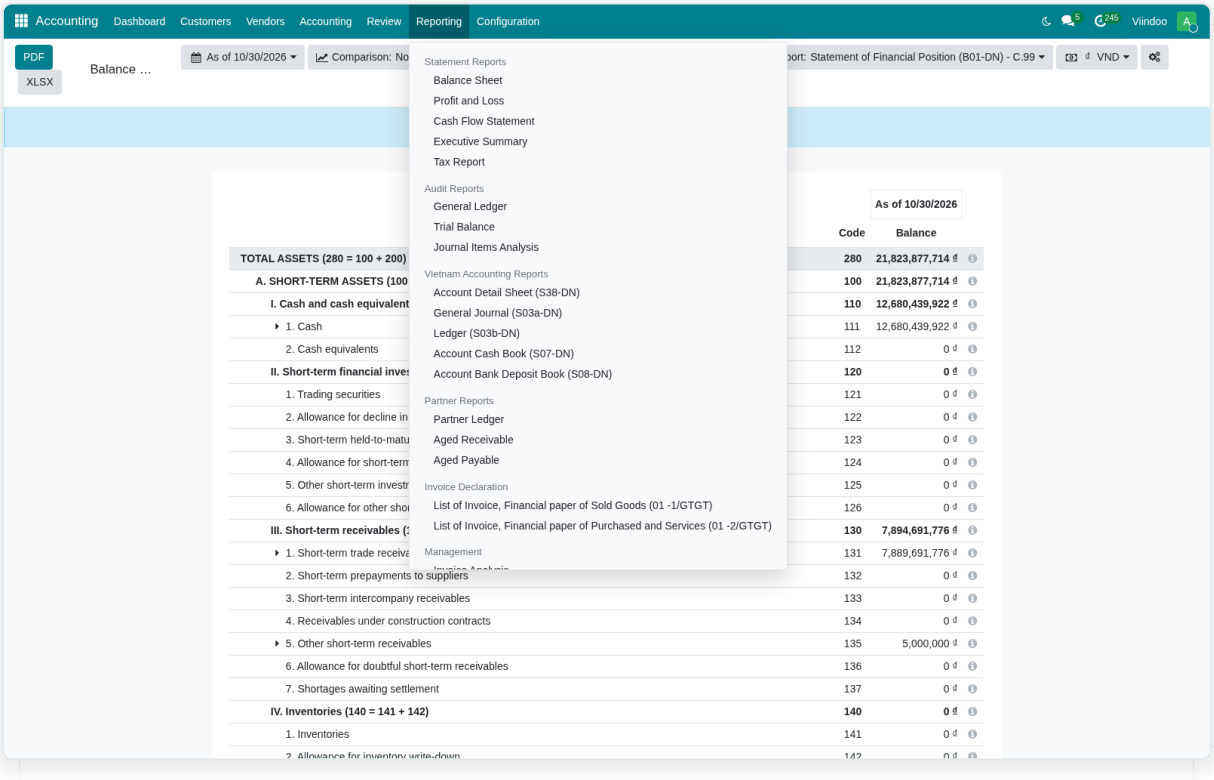


You should see: a report in the B03-DN format, with all three groups: operating - investing - financing activities.

> **On this demo system the lines are at zero, and that is correct.** The direct-method B03-DN reads only the entries that pass through the **cash accounts** (111, 112). The demo has only recorded payments and has not yet **reconciled bank statements**, so all the cash still sits in holding accounts such as *1131 Outstanding Receipts*. Once your company reconciles statements - an everyday accounting task - the cash moves to 112 and this report fills itself in. This is a characteristic of the **demo data**, not a limit of the software.

Step 5 - The Vietnamese accounting books

Open the menu `Accounting > Reporting` and look at the group `Vietnam Accounting Reports` (the screenshot below was taken with the menu open).

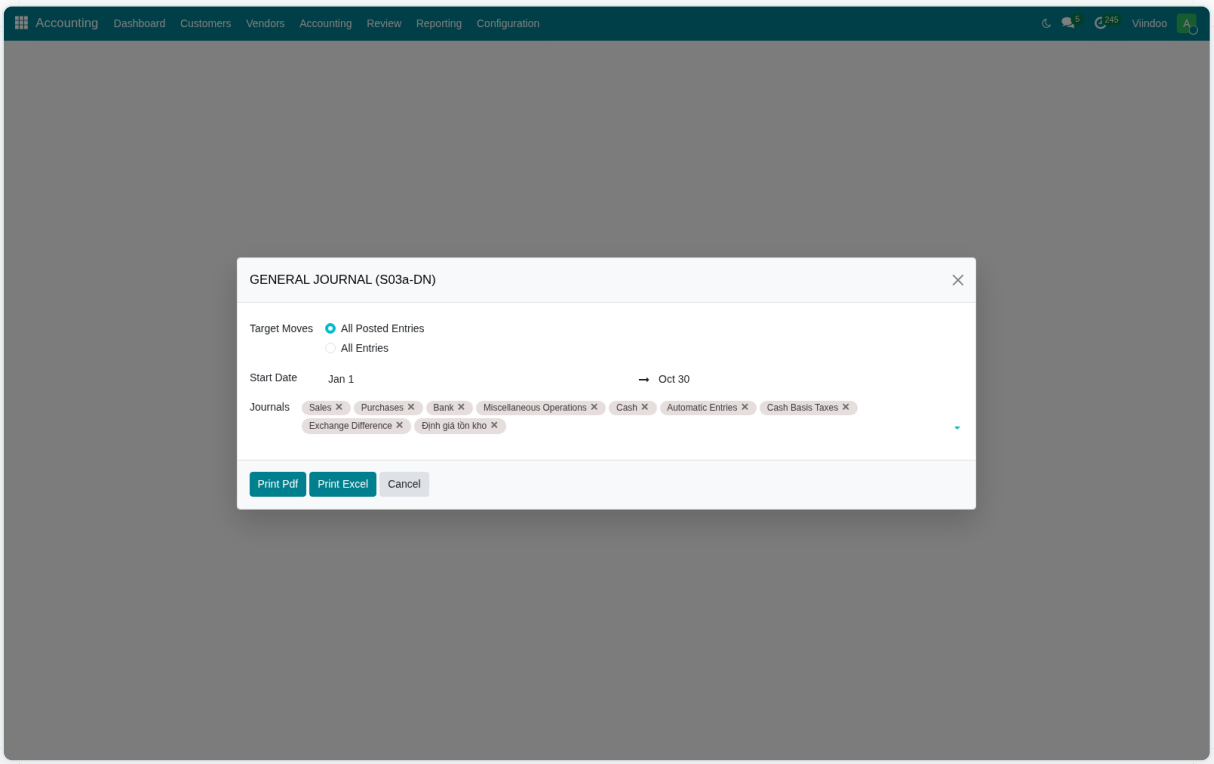


You should see: five books in exactly the Ministry of Finance format:

Book	Form
General Journal	S03a-DN
Ledger	S03b-DN
Account Detail Sheet	S38-DN
Account Cash Book	S07-DN
Account Bank Deposit Book	S08-DN

Step 6 - Open a book

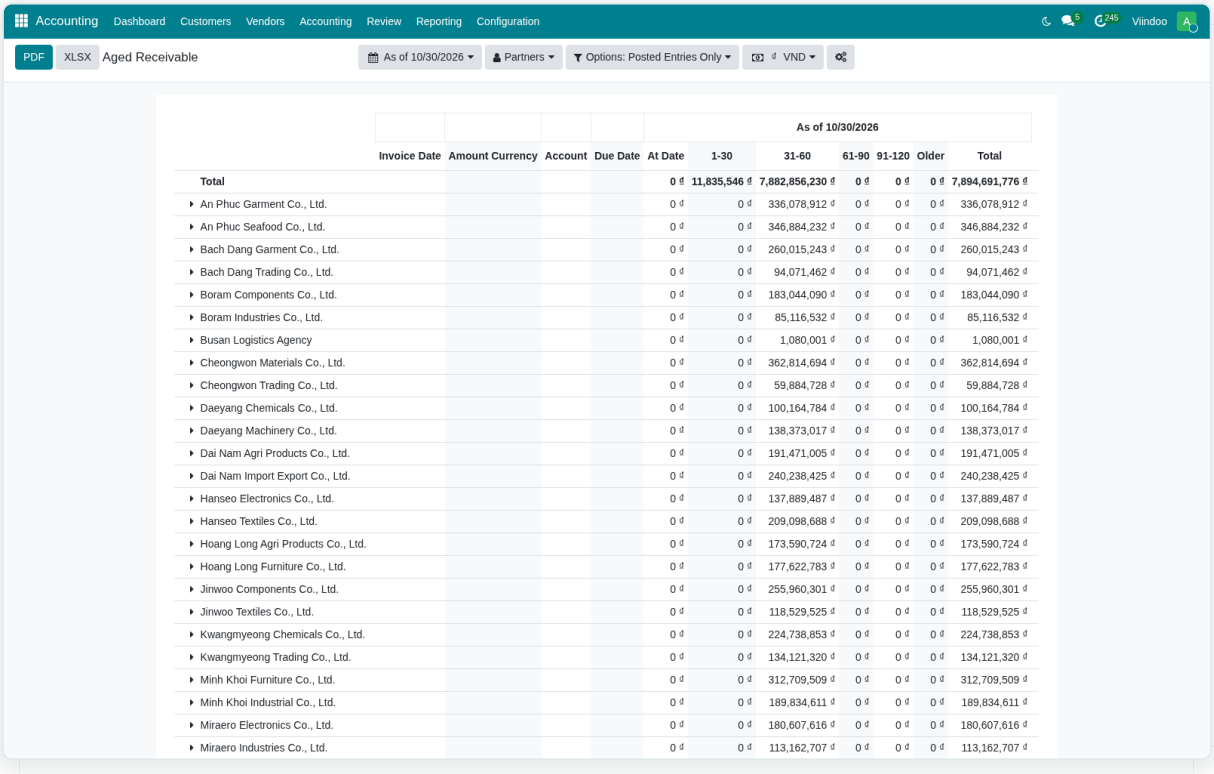
Click **General Journal (S03a-DN)**.



You should see: the **GENERAL JOURNAL (S03a-DN)** dialog to choose **Target Moves**, **Start Date**, **End Date** and the **Journal**; click **Print Pdf** or **Print Excel** to export the book in the Ministry of Finance format (each entry by date, with the document number, debit account, credit account and amount).

Step 7 - Receivables and payables by partner

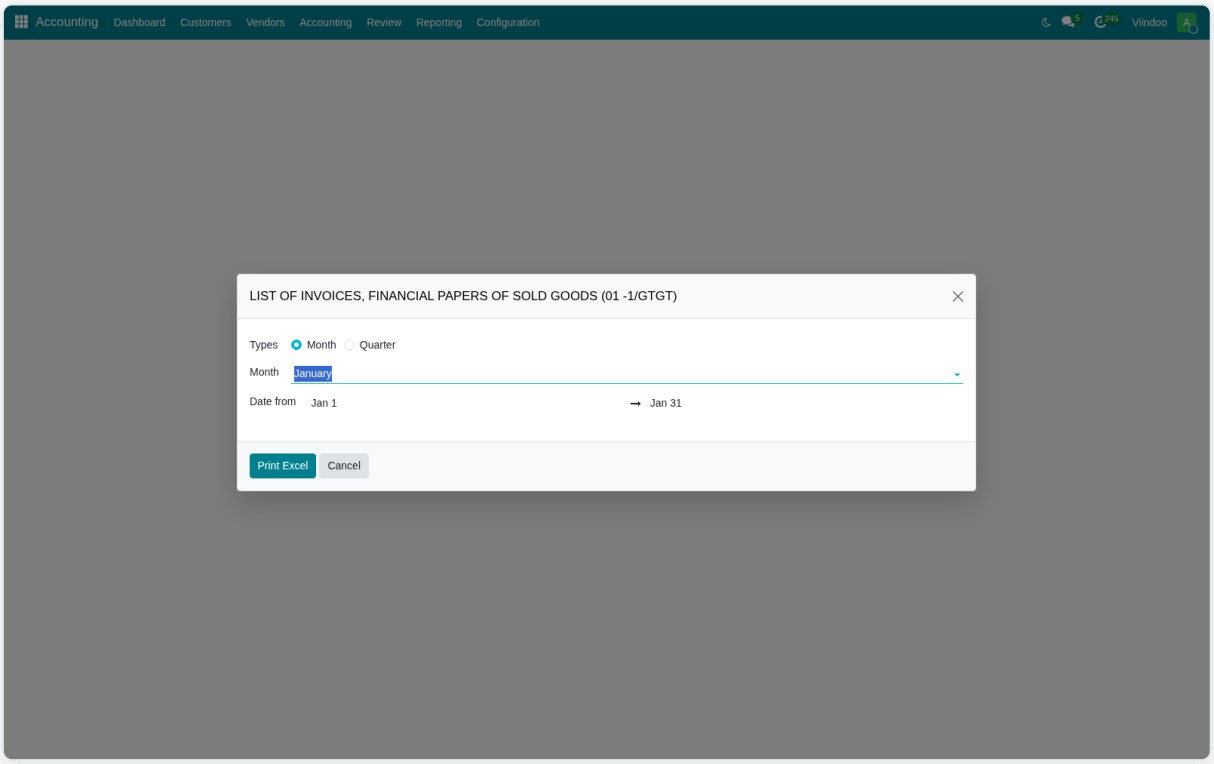
Go to `Accounting > Reporting > Partner Reports > Aged Receivable`.



You should see: each customer, how much they owe, how many days overdue, split by ageing bracket. Alongside it are **Aged Payable** and **Partner Ledger**.

Step 8 - The VAT invoice list

Go to `Accounting > Reporting > Invoice Declaration > List of Invoice, Financial paper of Sold Goods (01 -1/GTGT)`.



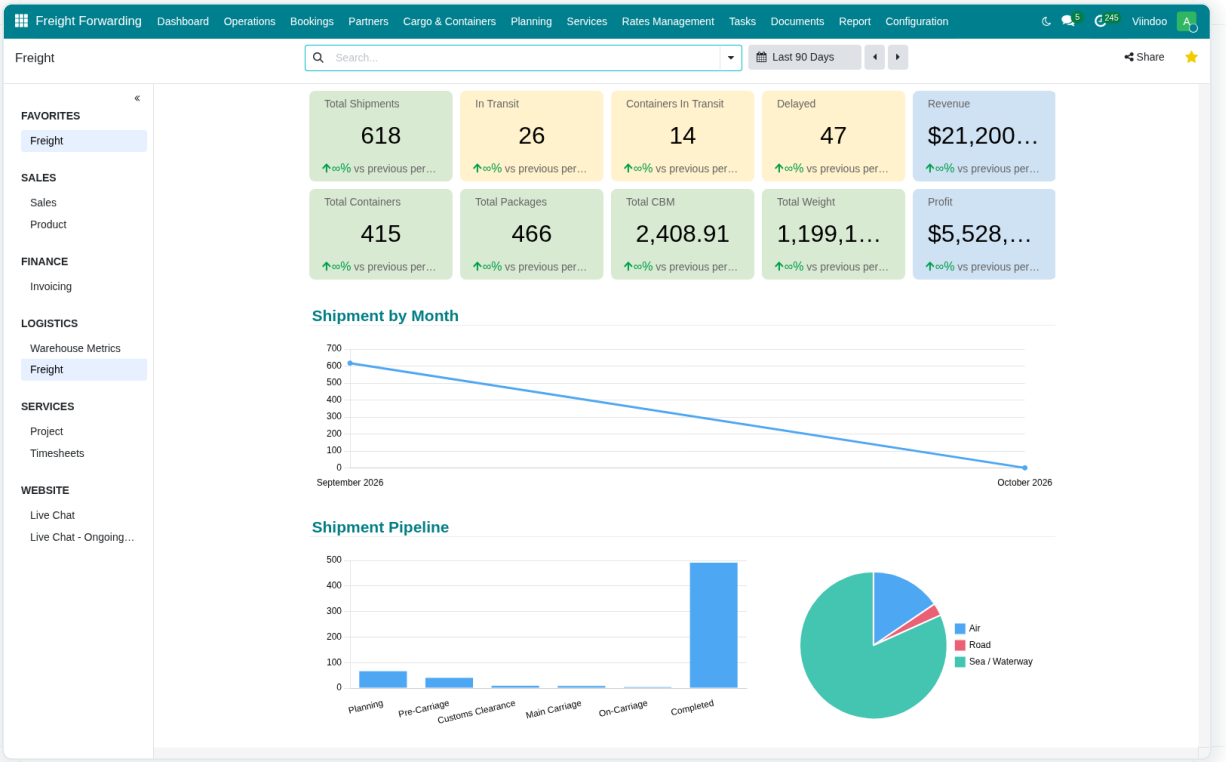
You should see: two forms, **List of Invoice, Financial paper of Sold Goods (01 -1/GTGT)** and the purchases form **List of Invoice, Financial paper of Purchased and Services (01 -2/GTGT)**. Click the sales form: a dialog lets you choose **Type** (Month or Quarter), the period, and the **Print Excel** button.

11 DASHBOARD, JOURNEY MAP AND CUSTOMER PORTAL

About 8 minutes. You do not need to create anything for these three, just open them. This is the part to set aside for the decision-maker.

Step 1 - The freight dashboard

Go to `Freight Forwarding > Dashboard` . The **Freight** board opens straight away (the left column lists the other boards: **Sales**, **Invoicing**, **Warehouse Metrics**, **Project**...).

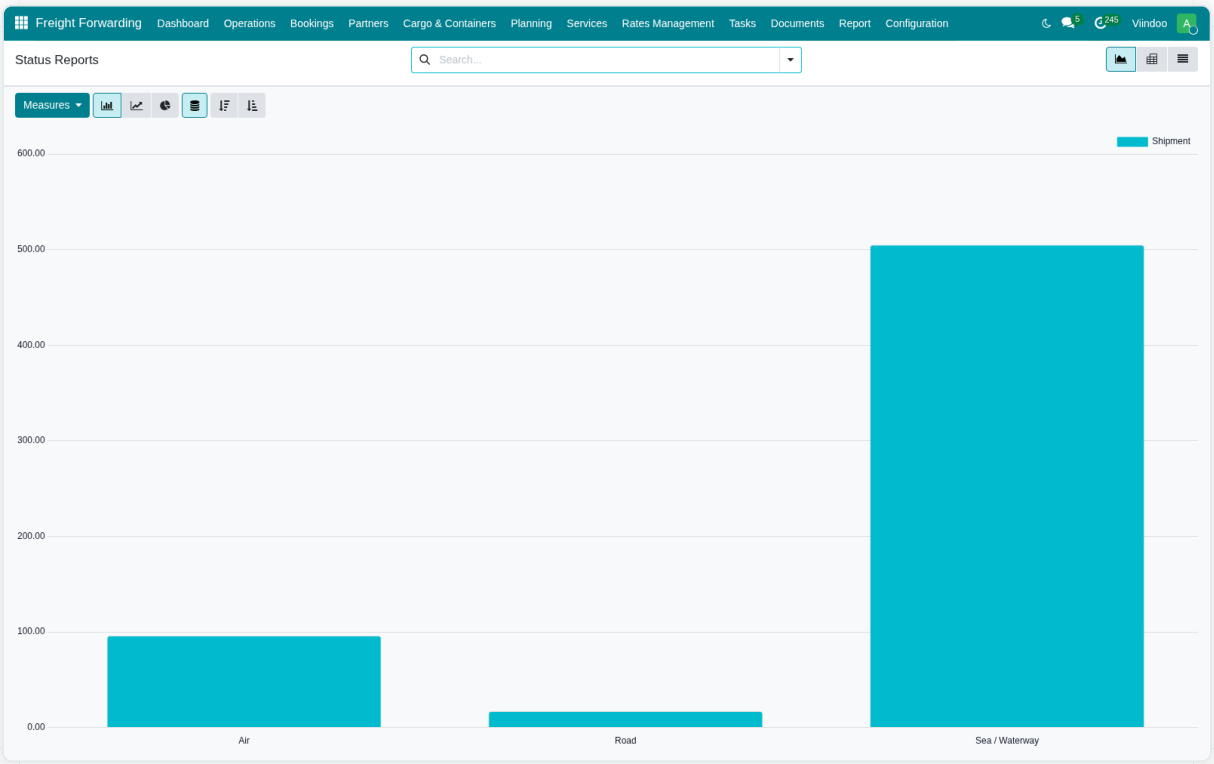


You should see: the figure tiles (**Total Shipments**, **In Transit**, **Containers In Transit**, **Delayed**, **Revenue**, **Total Containers**, **Total Packages**, **Total CBM**, **Total Weight**, **Profit**) and two charts, **Shipment by Month** and **Shipment Pipeline**.

> **About the currency symbol:** the amounts on this board are in **Vietnamese dong (VND)**; the "$" sign is just how the board displays them, not US dollars.

Step 2 - Shipment status report

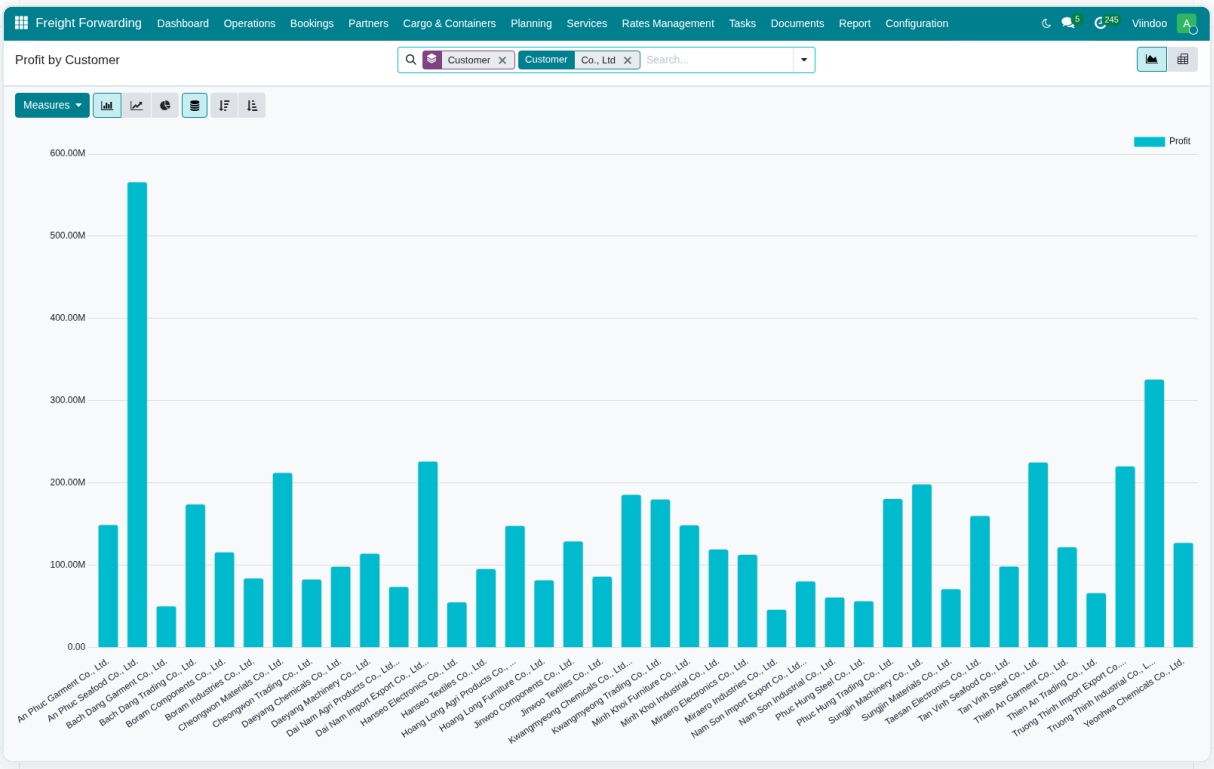
Go to `Freight Forwarding > Report > Status Reports`.



You should see: a bar chart counting shipments by transport mode (**Air**, **Road**, **Sea / Waterway**); switch to the table view (the button in the top right corner) to see the numbers.

Step 3 - Profit by customer and by salesperson

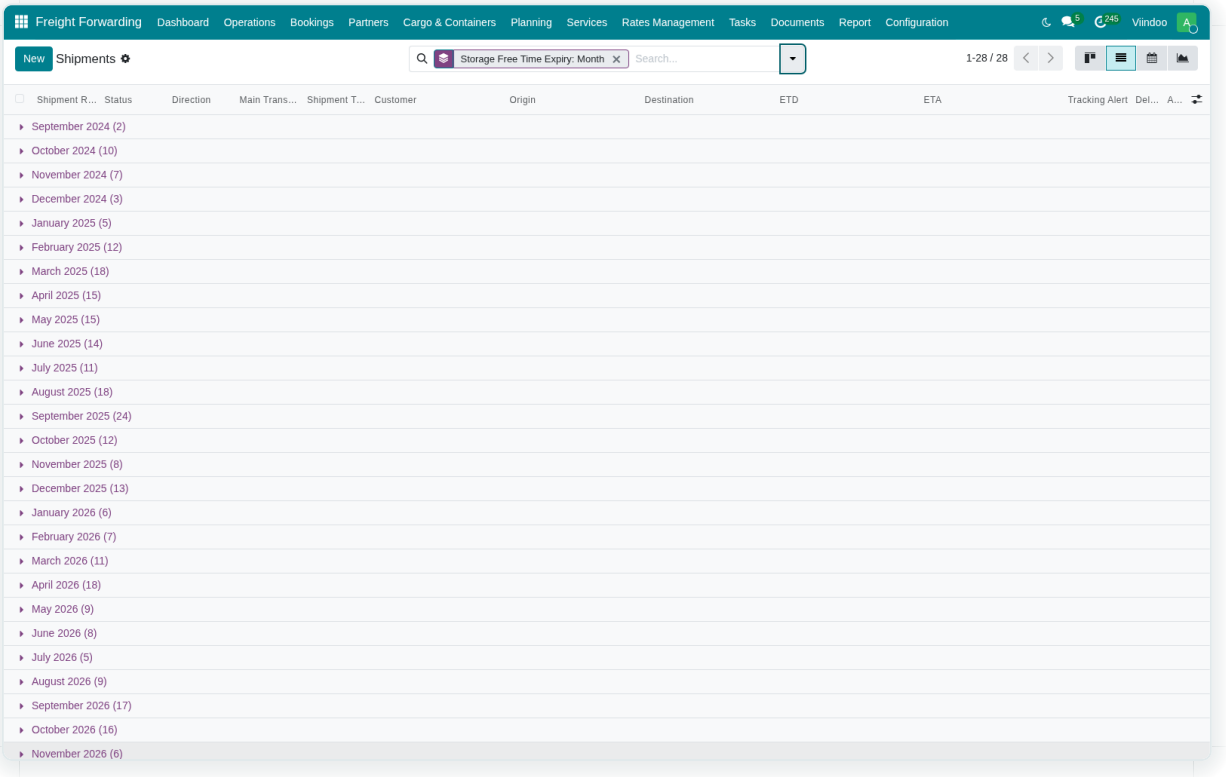
Go to `Freight Forwarding > Report > Profit Reports > Profit by Customer`.



You should see: a bar chart of **Profit** per customer (the screenshot is filtered with **Customer** containing "Co., Ltd" to keep only companies). Click the sort icon on the toolbar to order from highest to lowest. Alongside it is **Profit by Salesperson**.

Step 4 - The container storage clock that is already running

Go to `Freight Forwarding > Operations > All Shipments`, open the search box, and under **Custom Group** choose **Storage Free Time Expiry**.

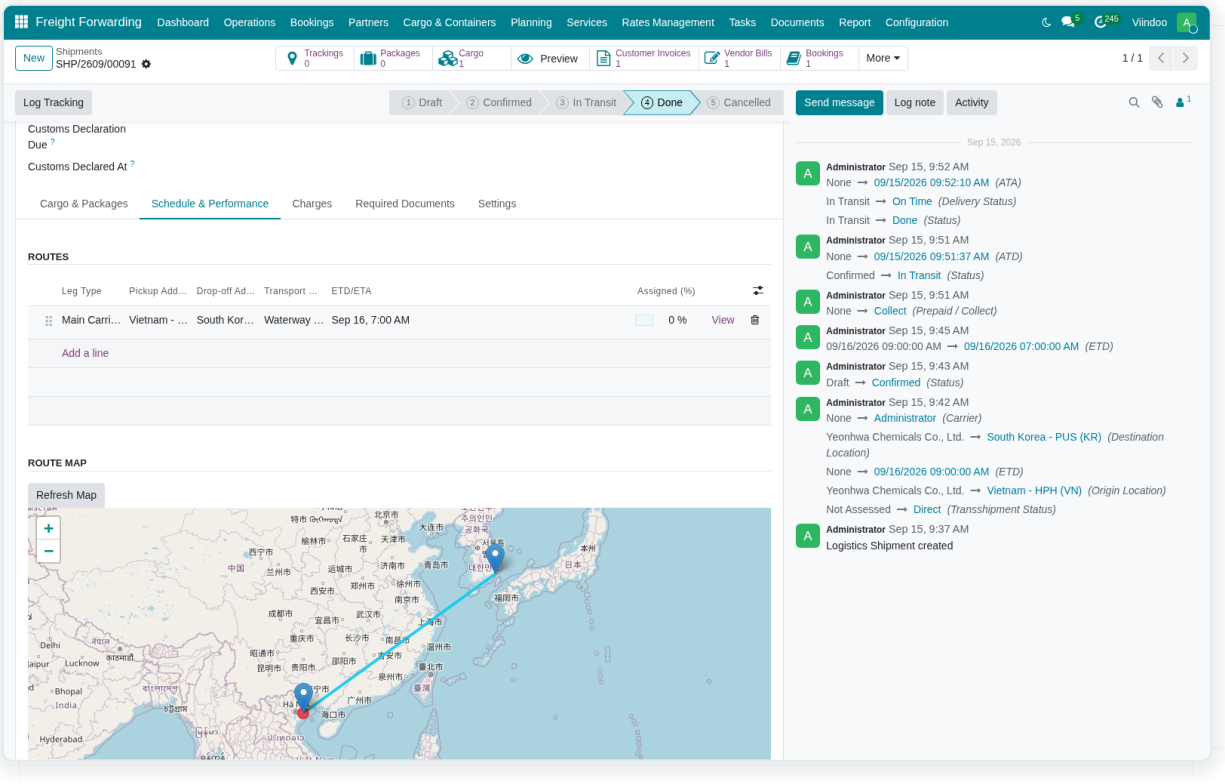


You should see: the list grouped by the month in which the storage grace period expires. On the demo system about **300 shipments** already have this deadline, and almost all have passed it (most are old shipments) - meaning the storage charge clock is already running.

> **This deadline lives on the SHIPMENT record:** the **Storage Free Time Expiry** field is in the **IMPORT OPERATIONS** block of an import shipment. For a full-container import, the **CONTAINERS** table on the shipment also has a **Last Free Day** column for each container (an optional column, switched on from the column settings icon).
>
> The product comes with an automated rule, **Shipment to Last Free Day** (a reminder 3 days ahead), plus rules that remind you of ETD, ETA, CY and declaration deadlines; on this demo system those rules are **switched off**, so no reminder task is generated automatically. What is not there: the system does **not create the storage charge line automatically**. That amount is still entered by hand.

Step 5 - The journey map

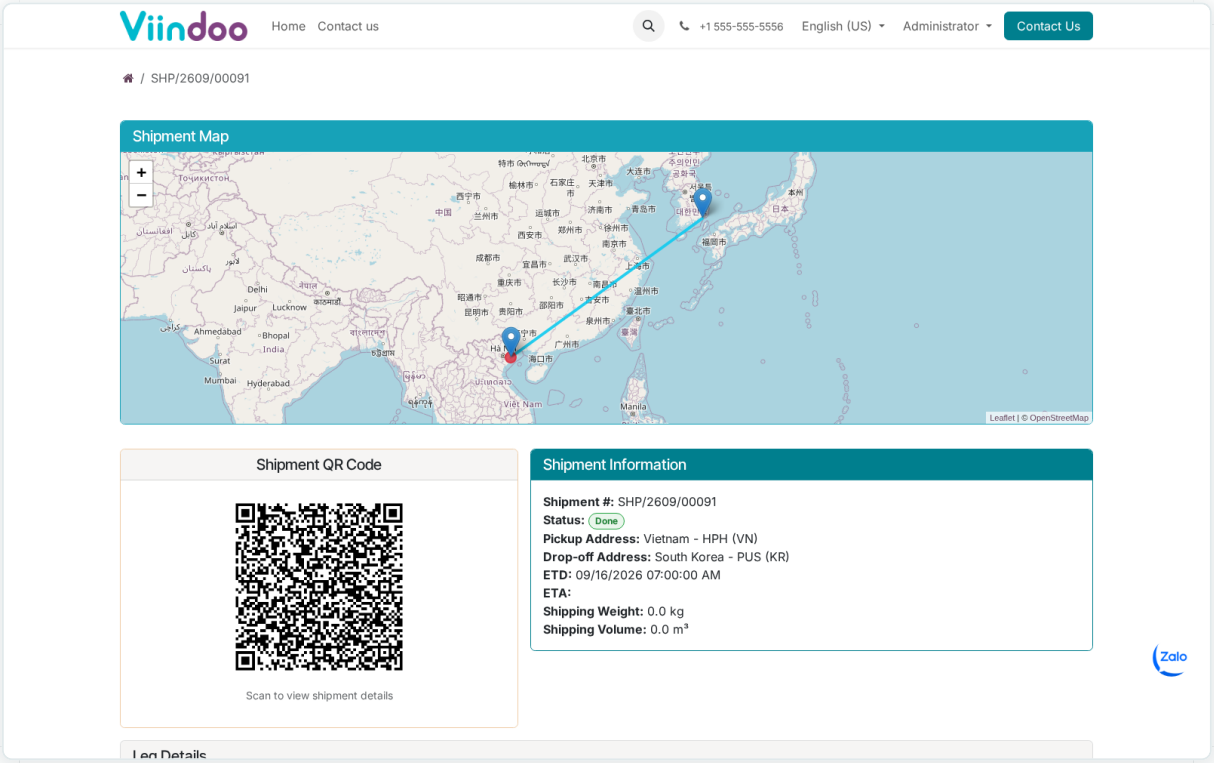
Open a shipment (in transit or completed), open the **Schedule & Performance** tab and scroll down to the **ROUTE MAP** section. If the map does not appear, click **Refresh Map**.



You should see: a line connecting the points of the route on the map; on the right of the record, the history panel records the changes to the shipment's information and its progress milestones.

Step 6 - The customer portal

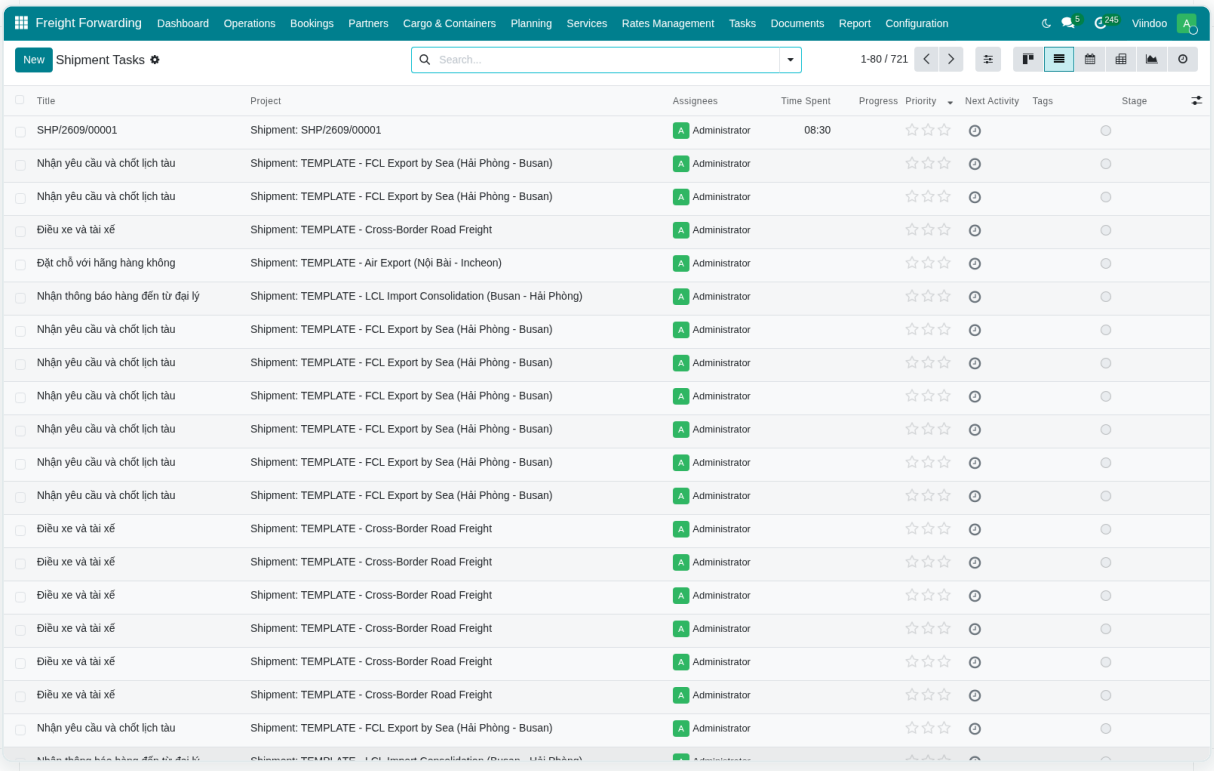
On the shipment record, click **Preview**.



You should see: the shipment's portal page: the **Shipment Map**, the **Shipment QR Code**, **Shipment Information** (shipment number, status, pickup and delivery addresses, ETD, ETA, weight, volume) and **Leg Details**. A customer who scans the QR code or opens the link sees where the shipment is, with no need to phone and ask.

Step 7 - Operational tasks by shipment

Go to `Freight Forwarding > Tasks > Shipment Tasks`.



You should see: the list of operational tasks of every shipment (more than seven hundred tasks), each row with **Title**, **Project** (the shipment), **Assignees**, **Time Spent**, **Progress**, **Priority**, **Next Activity**, **Tags**, **Stage**. Remove the **Open** filter if you want to see closed tasks too.

12 BUILD A TEMPLATE FOR YOUR OWN ROUTE

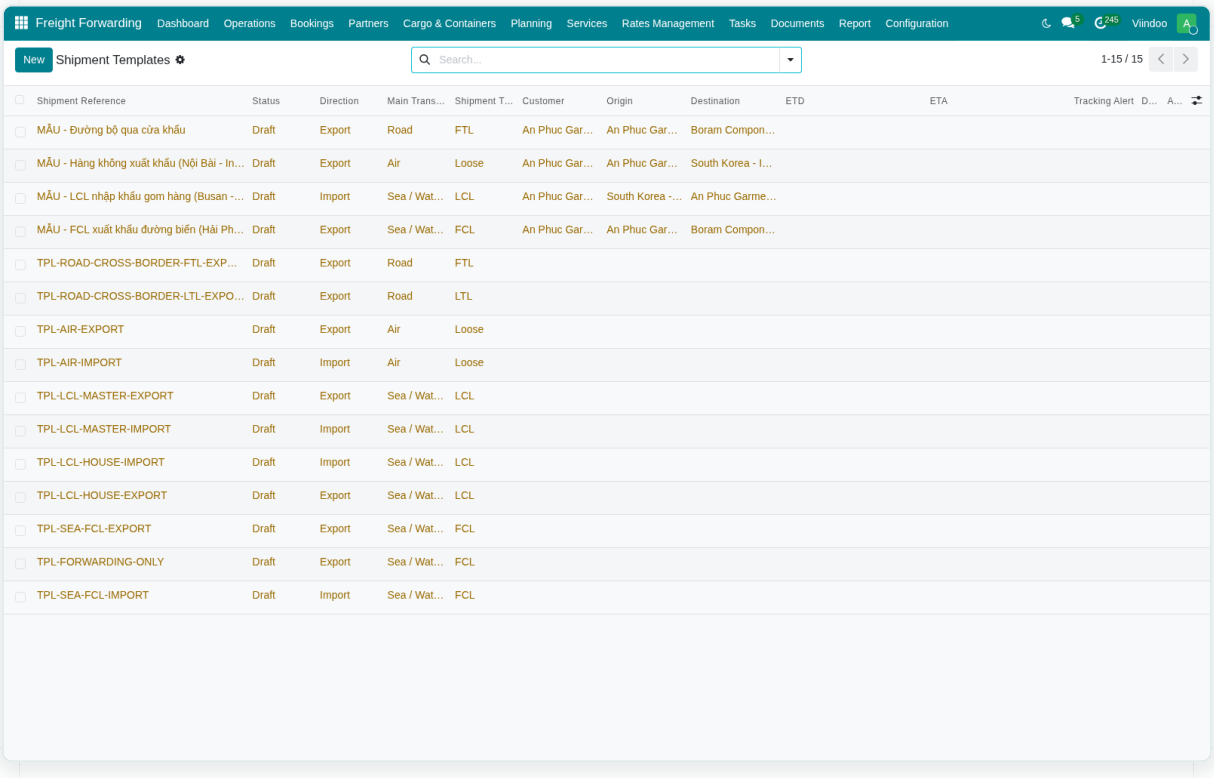
About 8 minutes. This is the most valuable lesson when your company puts the system into real use. A forwarder runs a few dozen fixed routes; build a template once and copy it forever.

Step 1 - Understand what a template really is

A template is simply **an archived shipment** (a record with an **ARCHIVED** ribbon in the corner). There is no separate model and no unfamiliar screen. Any shipment you archive becomes a template and shows up in the list behind the **From Template** button.

Step 2 - Open the template list

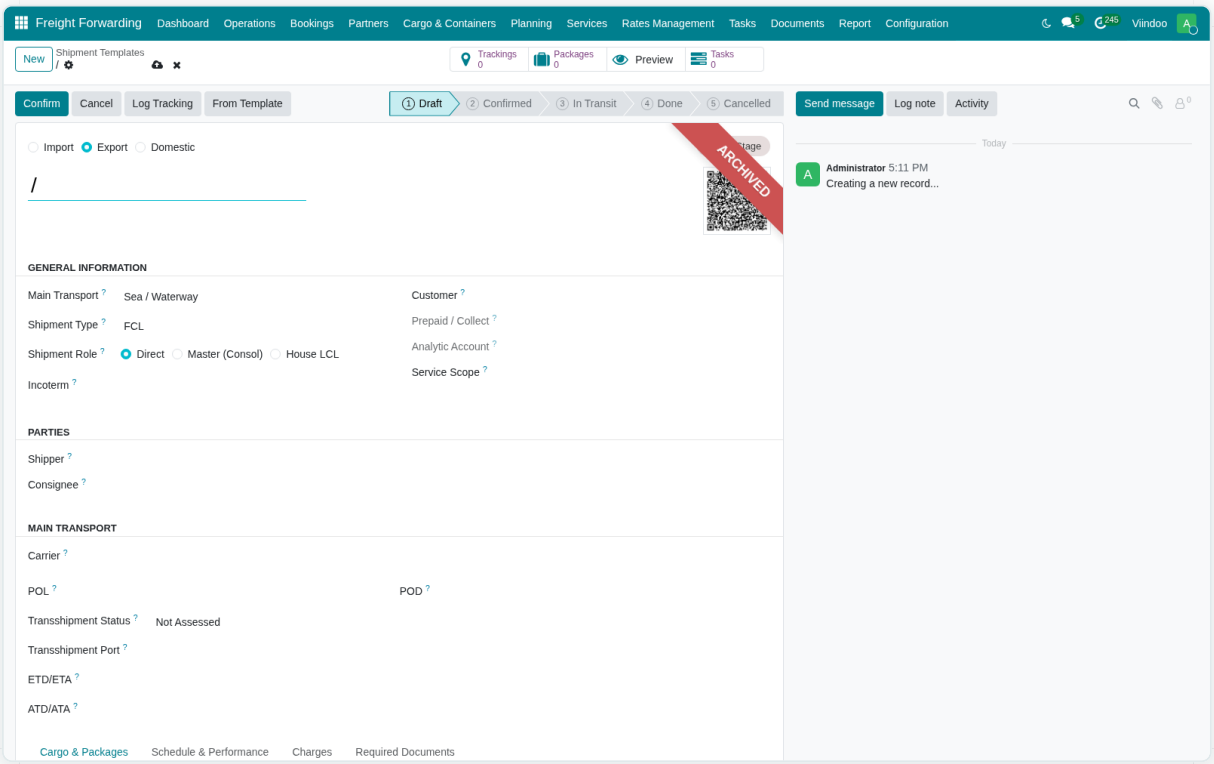
Go to `Shipment Management > Configuration > Other > Shipment Templates`.



You should see: 15 templates - 4 with Vietnamese names and 11 product templates with the `TPL-` prefix (if your company has just built another template, this number goes up).

Step 3 - Create a new template

Click **New** right on this screen.

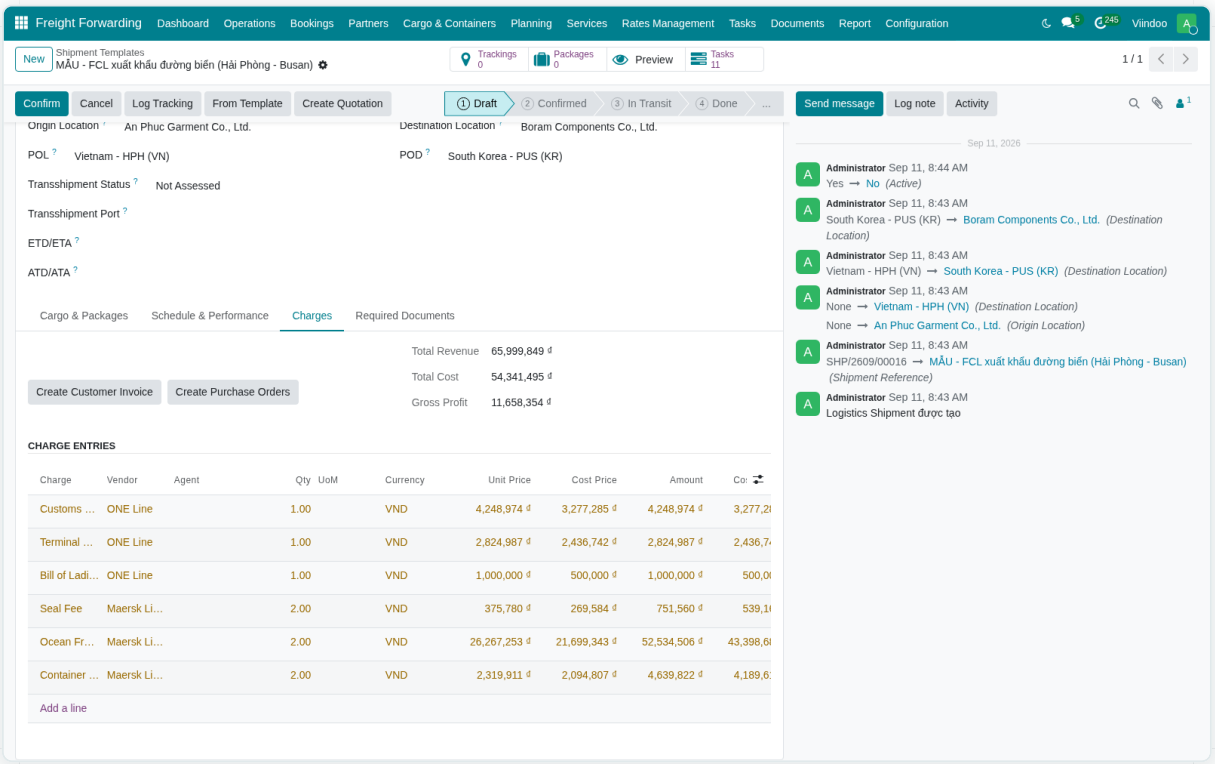


You should see: a new shipment record with the **ARCHIVED** ribbon - meaning it will become a template, not a live shipment.

Step 4 - Build the template's content

Name it after the route, then enter the four things the template will carry:

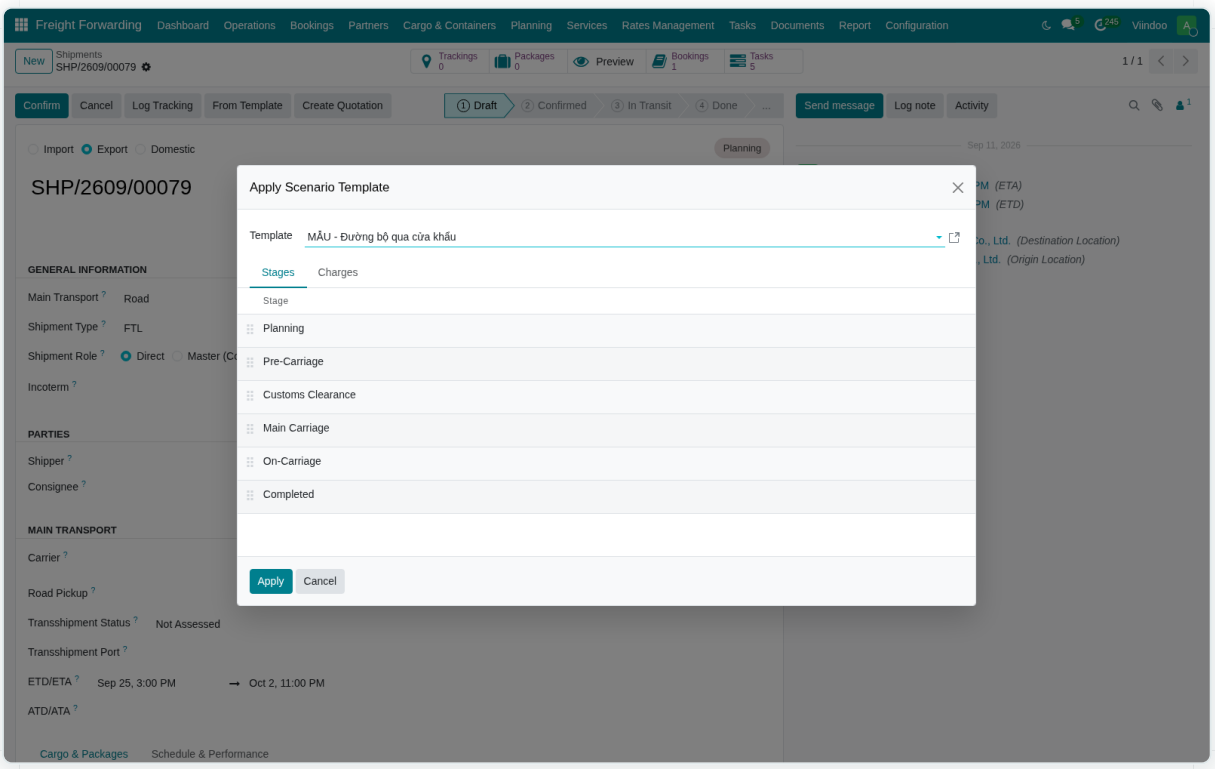
What to enter	Where
Shipment type and transport mode	top of the record
The route legs	the **Schedule & Performance** tab
The charge lines with selling price and cost price	the **Charges** tab (for a template, this tab shows even while the template is still in Draft)
The workflow steps	the stage field at the top right of the record (**Select Stage**)



You should see: the screenshot shows the template **MẪU - FCL xuất khẩu đường biển** (FCL sea export template) fully built, with the **Charges** tab listing six charge lines with **Unit Price** and **Cost Price**. A template of your own needs all four parts above. Save.

Step 5 - Try out the template you just built

Create a new shipment, click **From Template**, find the template you just built, click **Apply**.



You should see: the **Apply Scenario Template** dialog lists the template's stages and charges (the screenshot shows an existing template, not one built by you); after you click **Apply**, the new shipment receives the legs, charges, workflow steps and tasks from your company's template. As a reminder: **Cost Price** and **Vendor** are not copied across.

> **How it is done in practice:** run one representative shipment until you are happy with it, then duplicate it and archive the duplicate as the template. Much faster than building from scratch.

13 WHAT THIS DEMO DOES NOT DO

Better to say so up front.

Item	Status
Electronic customs clearance	Viindoo **does not file the declaration**. Clearance is done on the customs authority's own system; Viindoo records that the declaration was filed and the cargo cleared, and tracks the deadlines
Arrival notice	is a **timestamp**, not an email sent automatically to the recipient
Automatic storage charges	no charge line is created automatically; the reminder rule 3 days ahead exists but is switched off on this demo
Closing the books on a shipment	there is no lock operation to freeze a shipment's charge lines
Automatic escalating payment reminders	not on this demo system yet
Multi-level approval	not on this demo system yet
Several internal users	the demo has only one account, `admin`, so "My Tasks" and "My Documents" all point to one person. In a real rollout, each employee has their own account

In addition, a few terms on the screens - for example **Pre-Carriage**, **On-Carriage**, **Deconsolidate**, **Add Location Update** (with the **Save** and **Cancel** buttons), **Prepare Shipping Instruction**, **Cargo Manifest**, **House Shipments** - are standard English freight terms that stay as they are in every interface language. This does not affect data or business processes.

Two other points to know in advance: (1) the amounts on the **Dashboard** show a "$" sign but are Vietnamese dong; (2) the B01-DN balance sheet on the demo system does not yet balance between assets and equity and liabilities (Lesson 10).

APPENDIX. WHAT THE DEMO SYSTEM ALREADY CONTAINS

So that your company knows how much real data it is looking at.

> The figures below were measured directly on the system at the time of writing, rounded. The demo is reloaded with data daily and people try it at the same time, so the actual numbers may differ slightly.

Business volume

Item	Quantity
Active shipments	about **630**
Ready-made scenario templates	**15**
Transport legs	about **600**
Container equipment	about **420**
Cargo lines	more than **1,100**
Packages	about **470**
Carrier booking forms	about **560**

Documents and tasks

Item	Quantity
Operational tasks	more than **770**
Document requests	about **240**
Pending documents	about **200**
Completed documents	nearly **40**
Timesheet lines feeding shipment profit and loss	more than **200**

Accounting

Item	Quantity
Sales orders	about **590**
Posted customer invoices	about **500**
Of which not fully collected	about **245**

Item	Quantity
Posted vendor bills	more than **1,100**
Payments	about **850**
Posted journal entry lines	more than **10,000**

The ledger balances: total debits equal total credits across all posted journal entry lines (about 59 trillion VND on each side) - an exact match.

Money, over about 570 shipments that have figures (the Shipment Profitability report)

Revenue	about **21.2 billion VND**
Cost	about **15.7 billion VND**
Profit	about **5.5 billion VND**
Median margin	about **18%**
Shipments at a loss	**8 shipments**
Receivables still outstanding	about **7.8 billion VND**

Business scope

- Sailing dates range from **September 2024** to **November 2026**
- Three transport modes: sea about **510 shipments**, air about **100 shipments**, road about **17 shipments**
- Two directions: export about **375 shipments**, import about **250 shipments**
- Three shipment roles: **Direct** about **505**, **House LCL** about **90**, **Master (Consol)** about **30**

All company names, people and document numbers in the demo are data built for presentation purposes, not data of real customers.

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