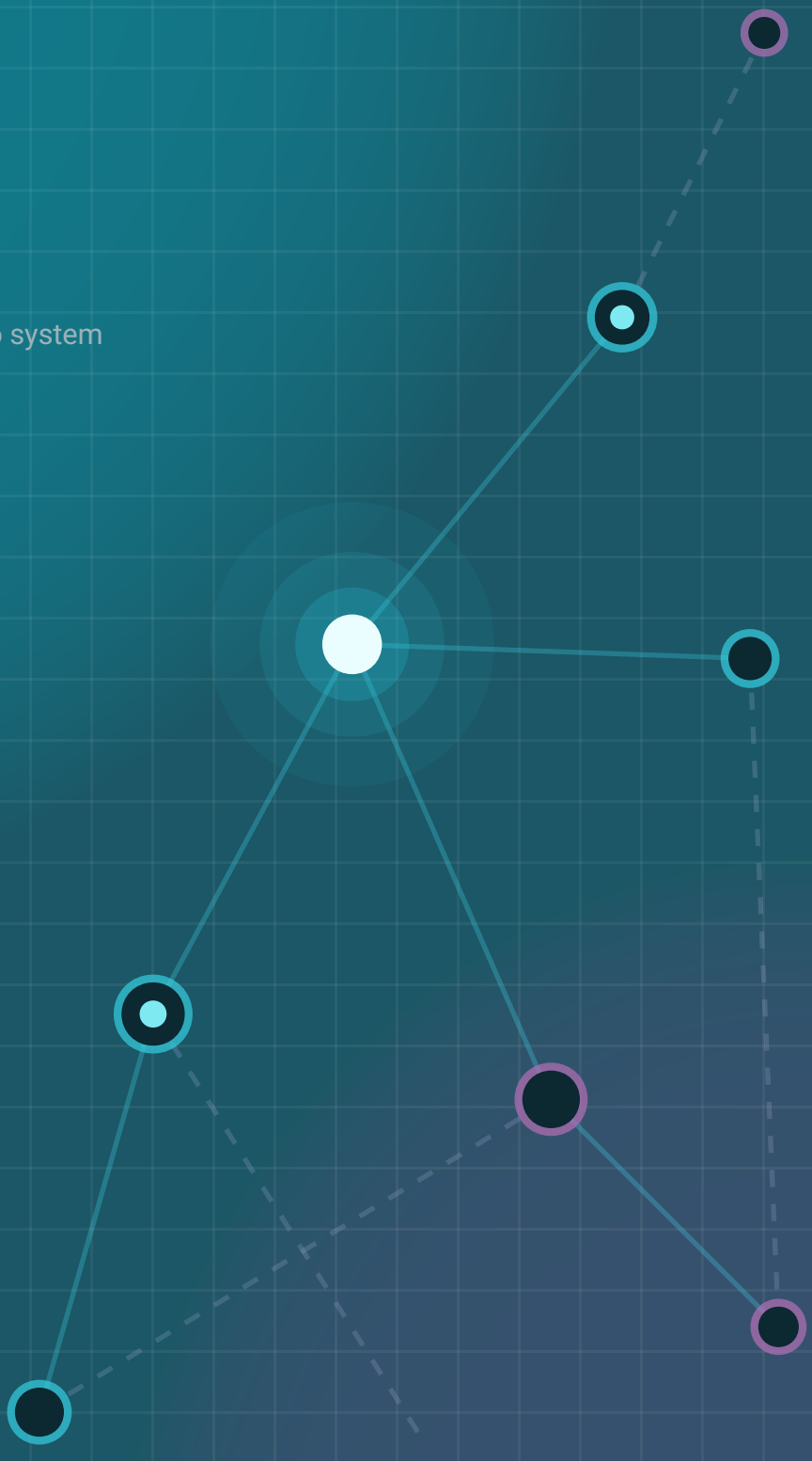
Viindoo

EBOOK · DEMO HANDBOOK

APPS

27 hands-on lessons on the demo system



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HOW TO USE THIS HANDBOOK

This short handbook walks your company through eight applications of the Viindoo business management system, preloaded with one year of operating data: CRM, Sales, Employees, Time Off, Attendances, Payroll, Recruitment and OKR. Each application has three groups of tasks, in the order a newcomer needs them: set it up yourself, complete one business process end to end, then read reports with real numbers.

The system is there for your company to try by hand, as if it were running your own business. There is nothing to install and no personal account to request. The home screen also has shared applications such as Discuss, Calendar and Contacts; this handbook does not cover them.

Logging in

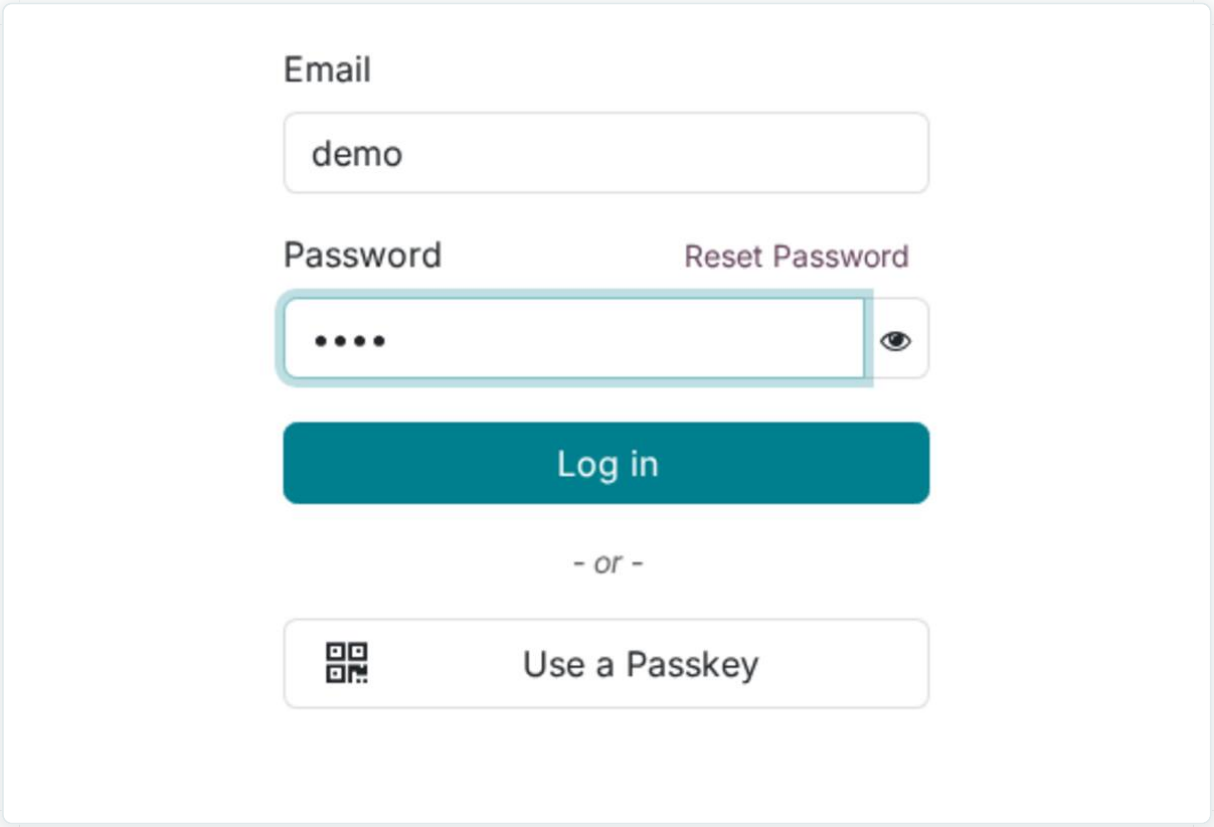
Your company logs in with the shared account of the demo system. This account is published openly and anyone can use it.

Item	Value
Address	https://v19demo-int.demo.viindoo.cloud/web/login
Account	`demo`
Password	`demo`

Step 1 - Open the login page and enter the account

Open the login address in your browser, type `demo` in the **Email** box, type `demo` in the **Password** box, then click **Log in**.

> *Path:* the login page **https://v19demo-int.demo.viindoo.cloud/web/login**
>
> 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**.

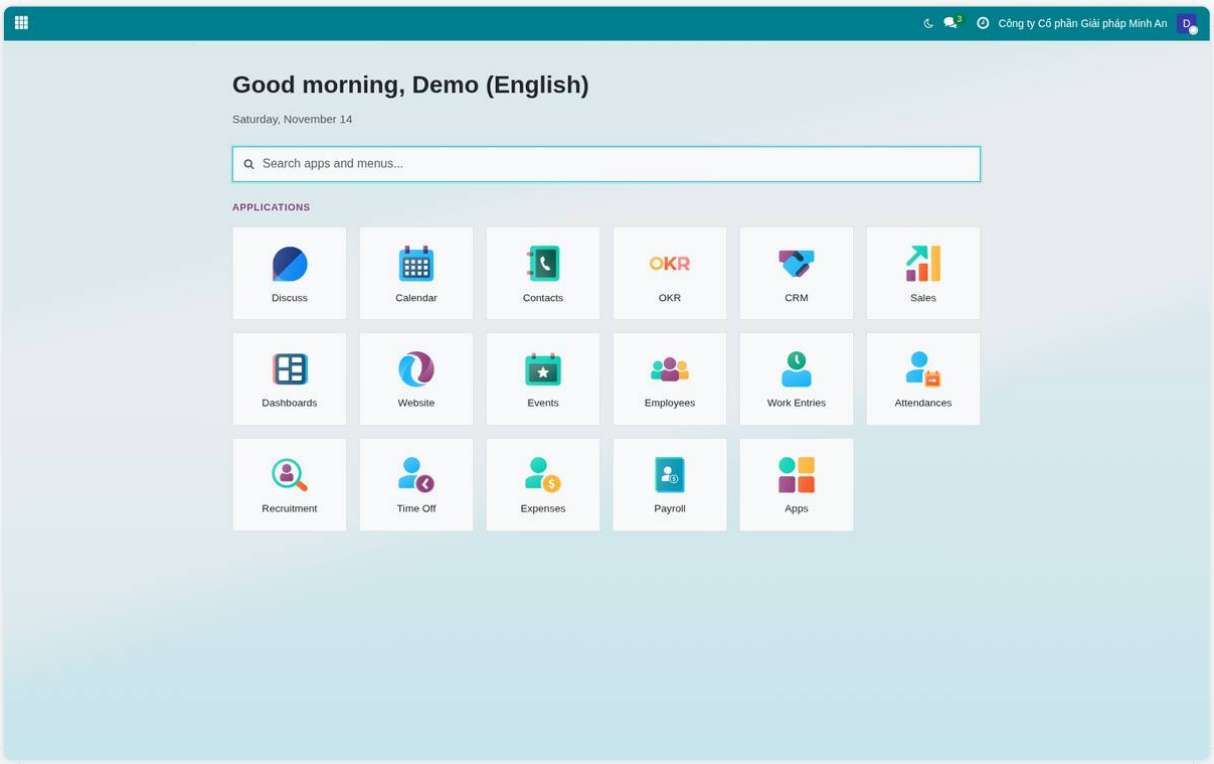


You should see: the **Email** box shows `demo`, and the **Password** box shows four dots. Click **Log in** to reach the home screen. The box is labelled "Email" but it also accepts the login name `demo`.

Step 2 - Recognize the eight applications in this handbook

After logging in, look at the application grid on the home screen. To return to this screen from anywhere, click the nine-square icon in the top left corner.

> *Path:* the home screen after login, the **nine-square** button in the top left corner



You should see: the application tiles, including all eight applications of this handbook: **CRM**, **Sales**, **Employees**, **Time Off**, **Attendances**, **Payroll**, **Recruitment** and **OKR**. A greeting with the account name appears at the top of the page.

Things to know when sharing one account

- Everyone uses the same account and the same fictional company, so your company will see changes that other people have just made, and they will see yours.
- The data is restored to its original state every night, so you can create, edit and delete as you try things.
- If someone changes the password, the system resets it to `demo` within a few minutes, so there is no risk of being locked out. At that moment the screen may report that your session has expired; just log in again with `demo` / `demo`.
- This account cannot open the Settings screen, install or remove applications, or create users. Your company can still configure things inside each application, for example the stages and sales teams in CRM, the pricelists in Sales and the objectives in OKR.
- The screenshots in this handbook were taken on 09/11/2026. Screenshots of create steps were taken with the form filled in but not saved. When your company does the steps itself, the numbers on screen may differ from the screenshots if someone has edited the data during the day.

Which part is for which role

Role in the business	Applications to open	Main tasks
Sales manager, head of a sales team	CRM, Sales	Track opportunities, prepare quotations, view revenue and forecasts
Director, executive	OKR, plus the CRM and Sales reports	Set quarterly objectives, view progress by department
HR manager	Employees, Time Off, Attendances	Employee records, leave requests, attendance from time clocks
Payroll manager	Payroll	Monthly payslips, insurance contributions
Recruitment manager	Recruitment	Open positions, candidates, interviews

Sample data in the system

The data uses fictional names and does not belong to a real business.

- **Company:** Công ty Cổ phần Giải pháp Minh An, Hanoi, accounting in Vietnamese dong. The company distributes office equipment and IT equipment, and provides installation and maintenance services for businesses.
- **Size:** about 40 employees.
- **Period:** 12 months, from November 2025 to October 2026, plus the first days of November 2026.
- **Revenue:** each complete month ranges from VND 1.72 billion to VND 2.90 billion before tax; February is low because of the Tet holiday, and March is the highest.
- **Reports:** the whole system has **86 reports** that open with the `demo` account, counting the shared applications, and **85 document templates** that can be printed.

How to read each lesson

The start of each lesson gives the time needed. Each step has four parts: a one-action instruction, a "Path" line giving the real menu from the application to the sub-menu, for example `CRM > Sales > My Pipeline`, a screenshot of exactly that screen, and a "You should see" line telling you what the screen should look like after you click. The end of each lesson has one "Try it yourself" sentence so your company can practice on its own data.

PART I. CRM

This part answers the questions: how many opportunities does your company's sales team have, which stage is each one at, how many were won, why were others lost, and how much is expected to close in the coming months. Sales managers and heads of sales teams should read this part first; directors only need the lessons *Sales pipeline, win/loss rate and lost reasons* and *Revenue forecast by expected closing month*. The data belongs to Công ty Cổ phần Giải pháp Minh An, with 96 won opportunities and 86 lost opportunities in the data period. The default pipeline screen shows only the opportunities owned by the account that is logged in; the reports cover the whole company.

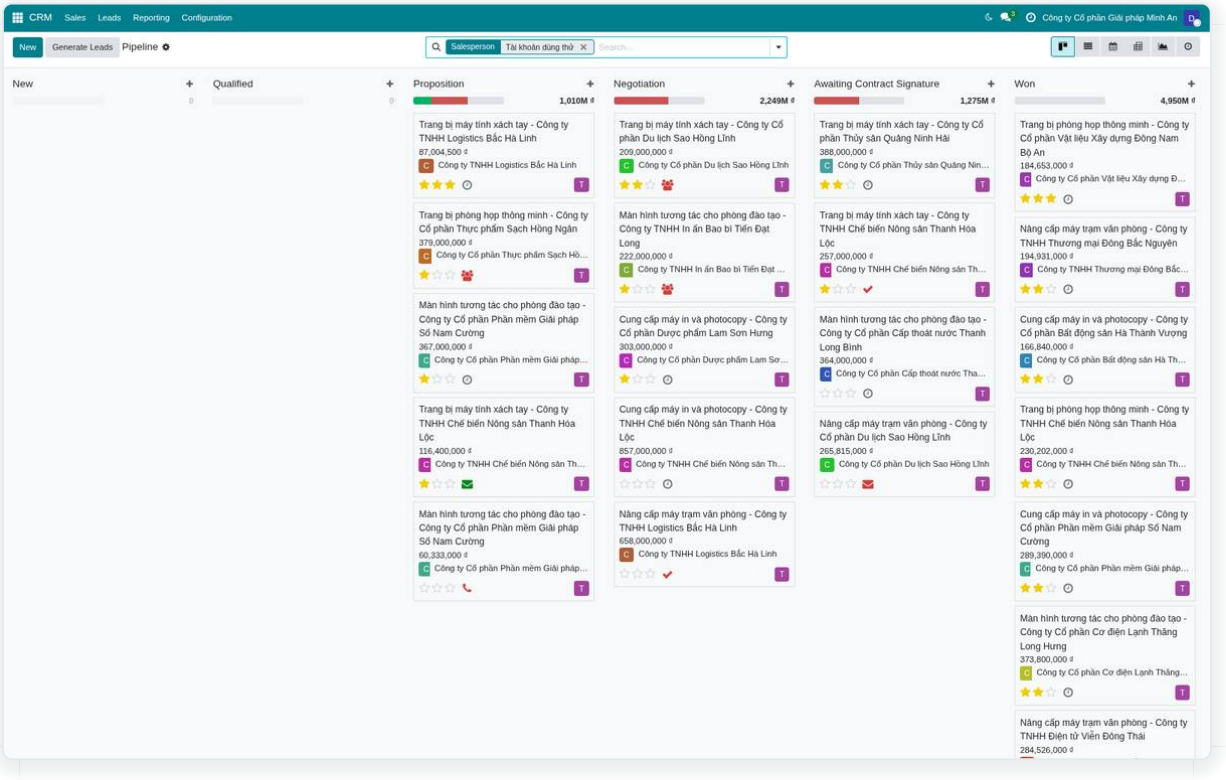
01 SET UP CRM: STAGES, LOST REASONS AND SALES TEAMS

About 15 minutes. By the end of this lesson your company knows which stages the sales pipeline has, which lost reasons the system records, how the sales teams are organized, and can add a new stage, a new lost reason and a new team. The screenshots of new items were taken with the form filled in but not saved, so the sample data is not changed.

Step 1 - View the stages of the sales pipeline

Click the **CRM** application, then open **My Pipeline**.

> *Path:* `CRM > Sales > My Pipeline`

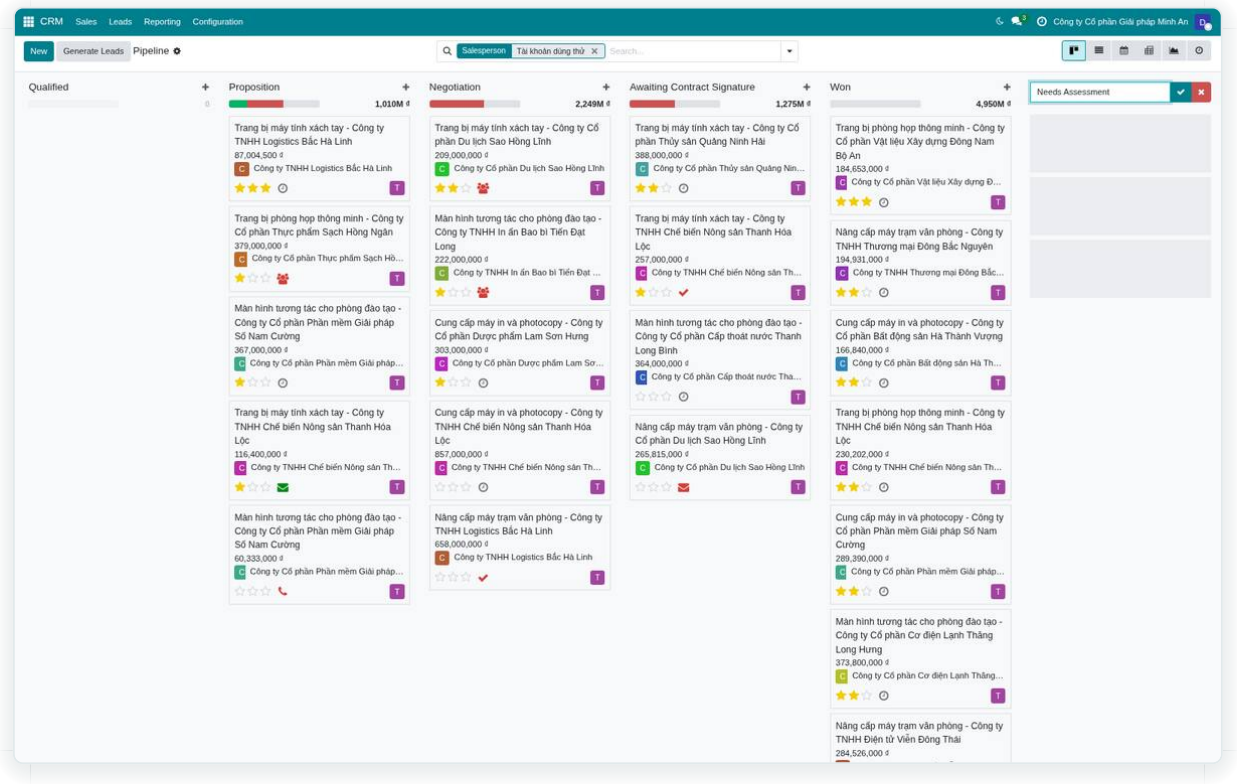


You should see: a kanban board with six stages in order from left to right: **New**, **Qualified**, **Proposition**, **Negotiation**, **Awaiting Contract Signature** and **Won**. Under each column name there is a colored bar and the total expected revenue of the column. The first two columns are empty because the **My Pipeline** filter only shows the opportunities of the account that is logged in. (In the screenshot, a filter on the salesperson of the demo account stands in for this filter.)

Step 2 - Add a stage

Click the two-arrow icon (tooltip **Add column**) at the right edge of the board, then type the name of the new stage, for example **Needs Assessment**. To add it, click the green tick; to cancel, click the red X.

> *Path:* `CRM > Sales > My Pipeline` , the **Add column** icon at the right edge of the board

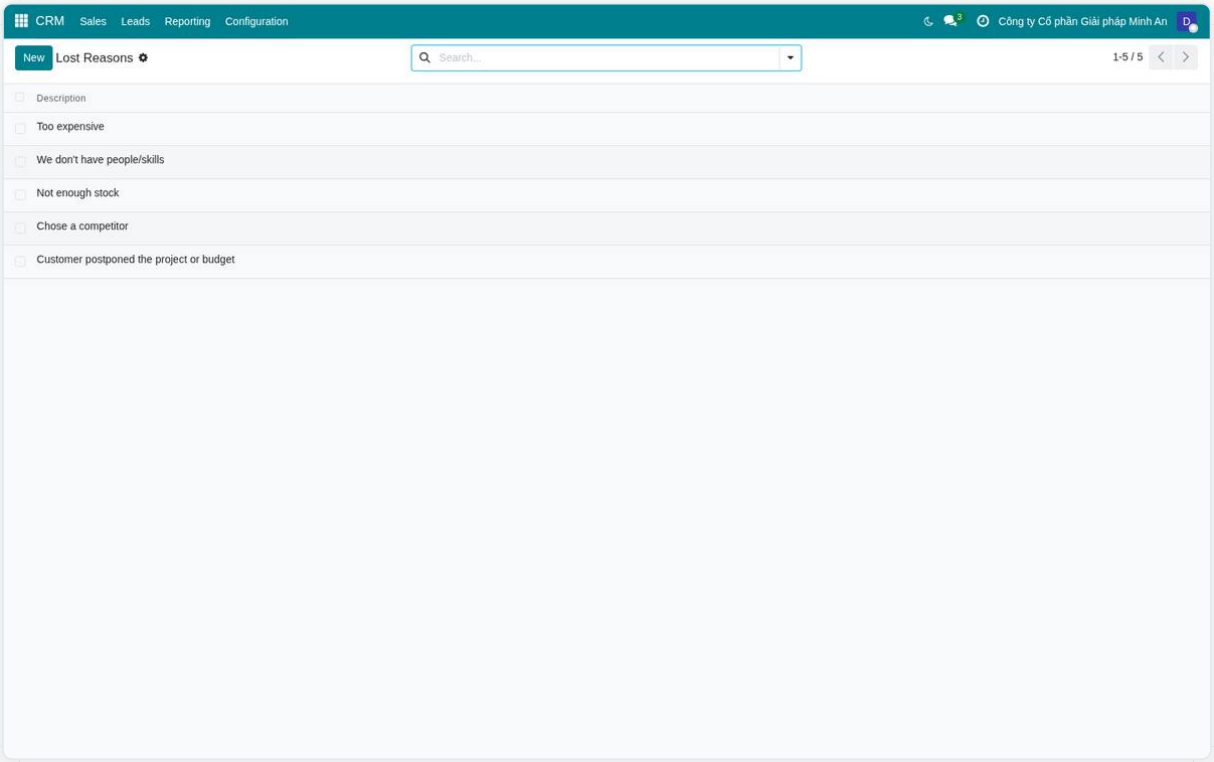


You should see: a box for the stage name to the right of the **Won** column, containing the text you typed, with two buttons: a green tick to add and a red X to cancel. When you click the tick, the system adds a new column to the board.

Step 3 - View the lost reasons

Open the list of lost reasons in the CRM configuration.

> *Path:* `CRM > Configuration > Pipeline > Lost Reasons`

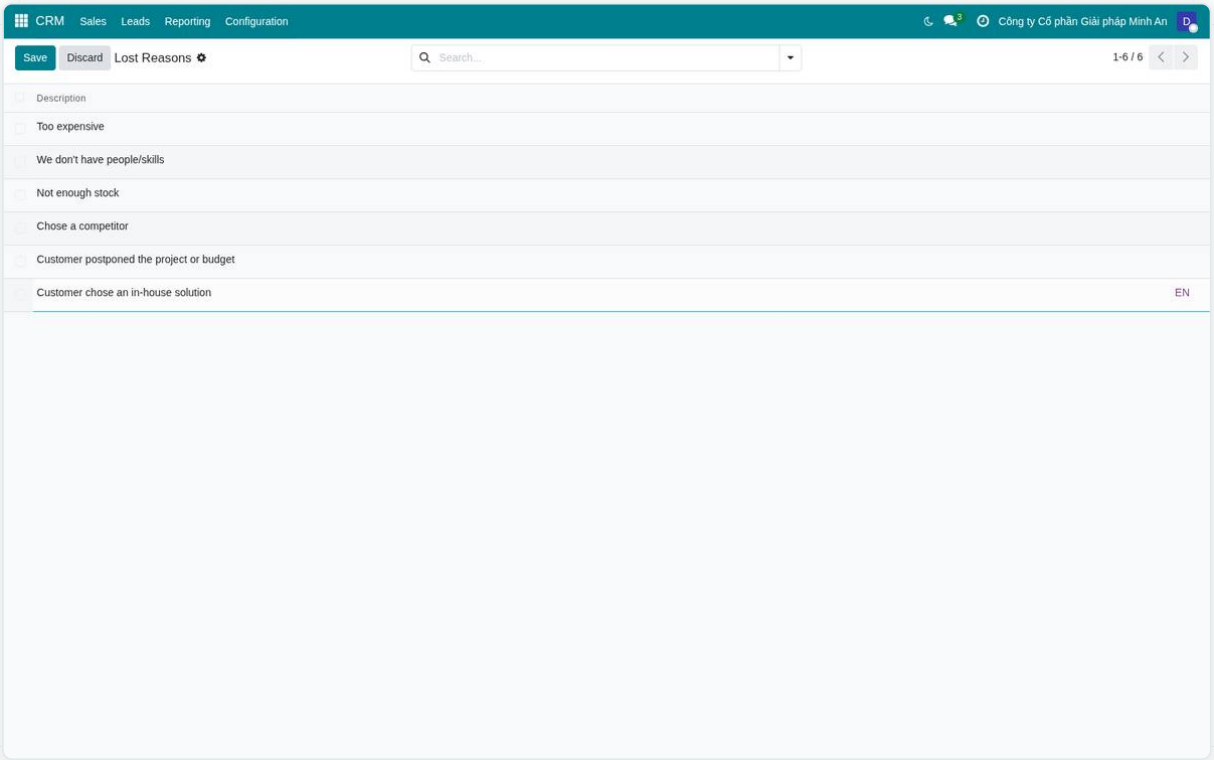


You should see: a one-column list headed **Description** with five lost reasons: **Too expensive**, **We don't have people/skills**, **Not enough stock**, **Chose a competitor** and **Customer postponed the project or budget**. These are the choices a salesperson sees when marking an opportunity as lost.

Step 4 - Add a lost reason

Click **New** in the top left corner and type the name of the reason, for example **Customer chose an in-house solution**.

> *Path:* `CRM > Configuration > Pipeline > Lost Reasons` , the **New** button

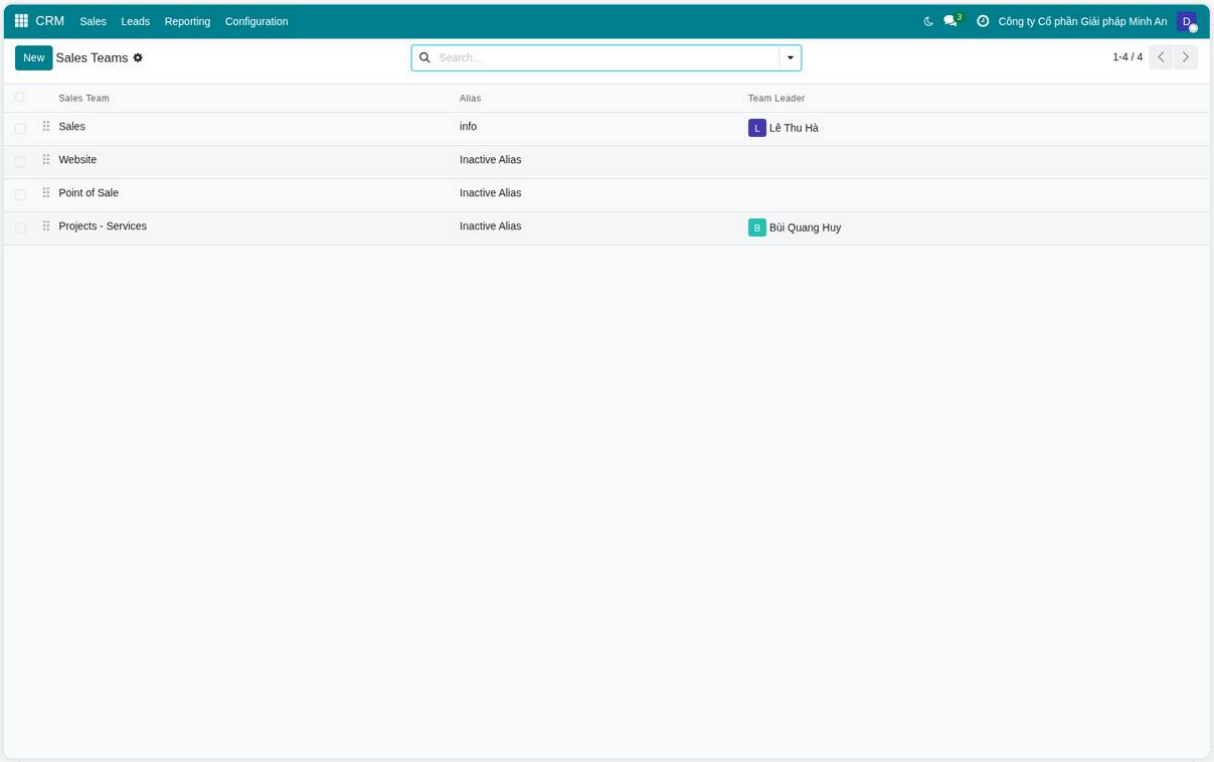


You should see: a new row at the end of the list containing the text you typed. The top left corner now shows two buttons, **Save** and **Discard**. Click **Save** and the reason can be used right away when marking an opportunity as lost.

Step 5 - View the sales teams

Open the list of sales teams in the configuration.

> *Path:* `CRM > Configuration > Sales Teams`

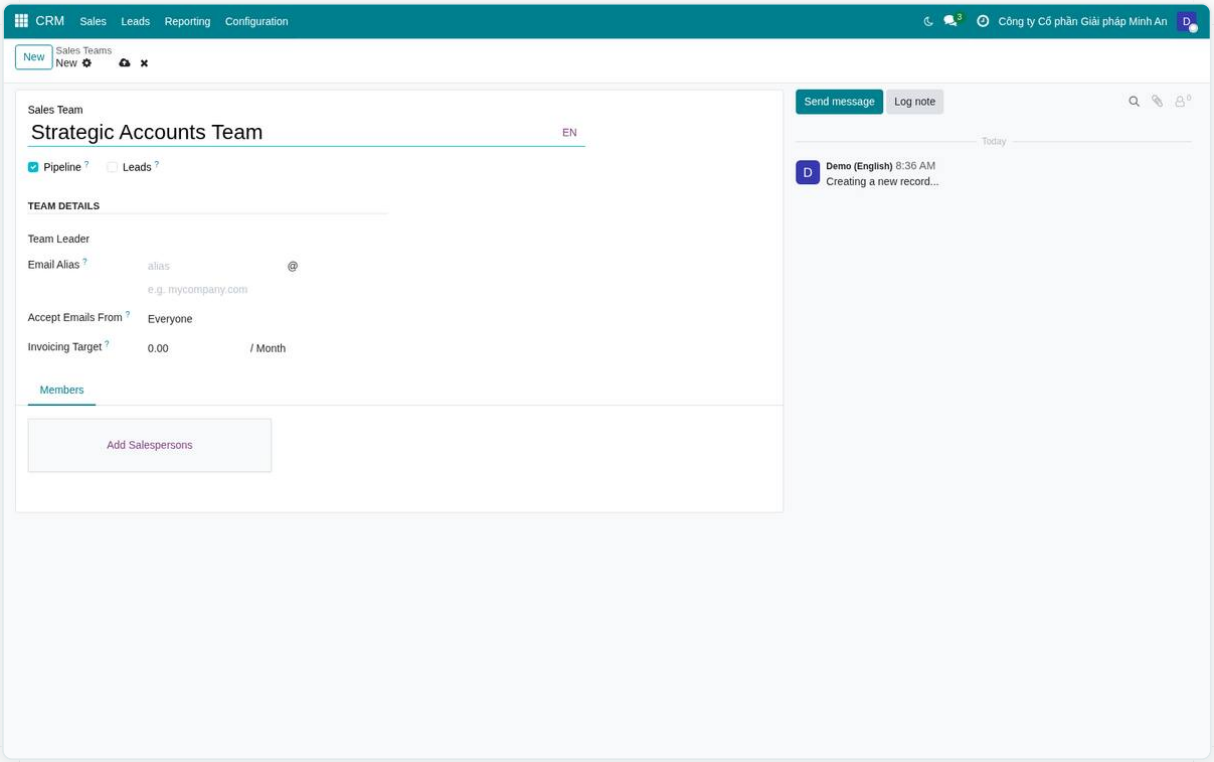


You should see: four teams: **Sales**, led by Lê Thu Hà, **Website**, **Point of Sale** and **Projects - Services**, led by Bùi Quang Huy. The **Website** and **Point of Sale** teams have no team leader yet.

Step 6 - Create a new sales team

Click **New**, then type the team name in the large box at the top of the form, for example **Strategic Accounts Team**.

> *Path:* `CRM > Configuration > Sales Teams` , the **New** button



You should see: the team name box contains the text you typed; the **Pipeline** checkbox is already ticked and the **Leads** checkbox is not; the **Team Details** section has **Team Leader**; the **Members** tab has an **Add Salespersons** button for placing people in the team. The title at the top still reads "New" because the record is not saved.

Try it yourself: create a team that matches how your company divides customers, for example by region or by industry, choose a team leader and add two salespeople in the **Members** tab.

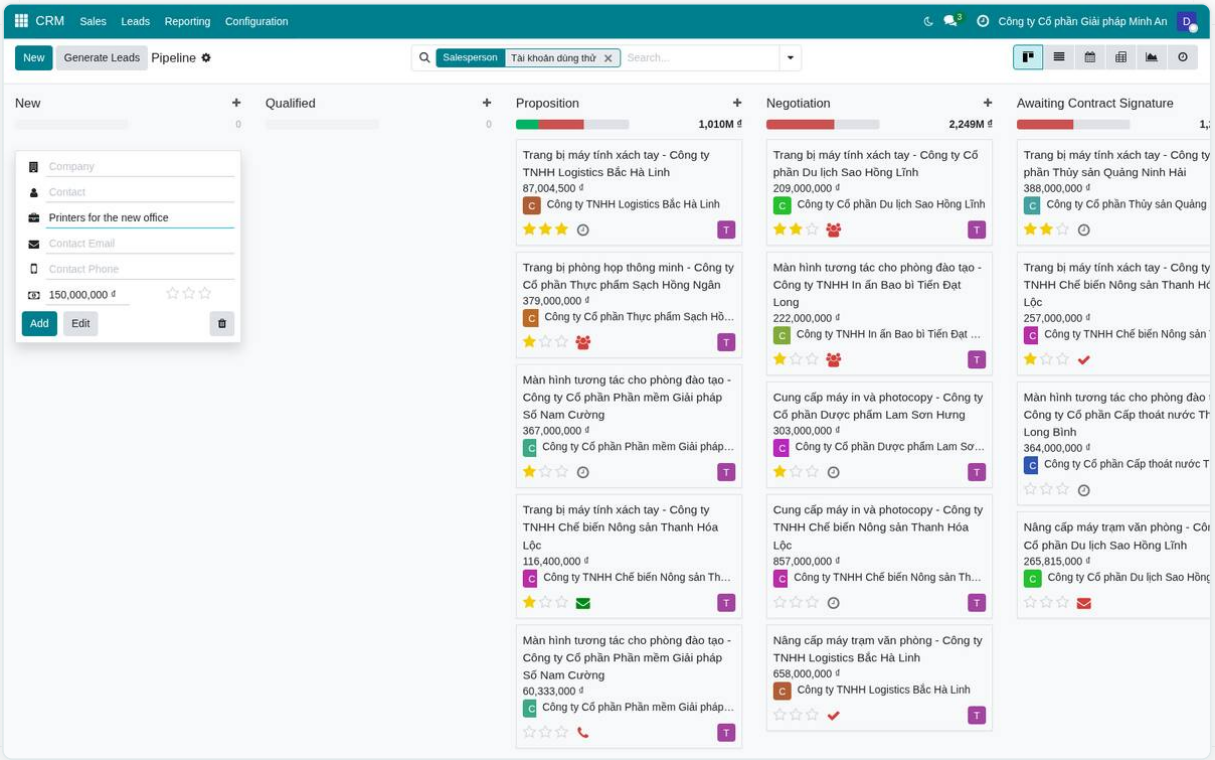
02 AN OPPORTUNITY FROM CREATION TO WON OR LOST

About 20 minutes. By the end of this lesson your company has followed the whole path of a sales opportunity: quickly entering a new opportunity, opening it, moving it to the next stage, then closing it as won or lost with a reason. The last two steps (won and lost) were captured on opportunities that are already in that state; the status buttons were not clicked on the sample data. When you do it yourself, click the buttons indicated.

Step 1 - Quickly enter a new opportunity

In the **New** column, click the plus sign at the top of the column, type the opportunity name in the name box and enter the expected revenue.

> *Path:* `CRM > Sales > My Pipeline` , the **+** sign at the top of the **New** column

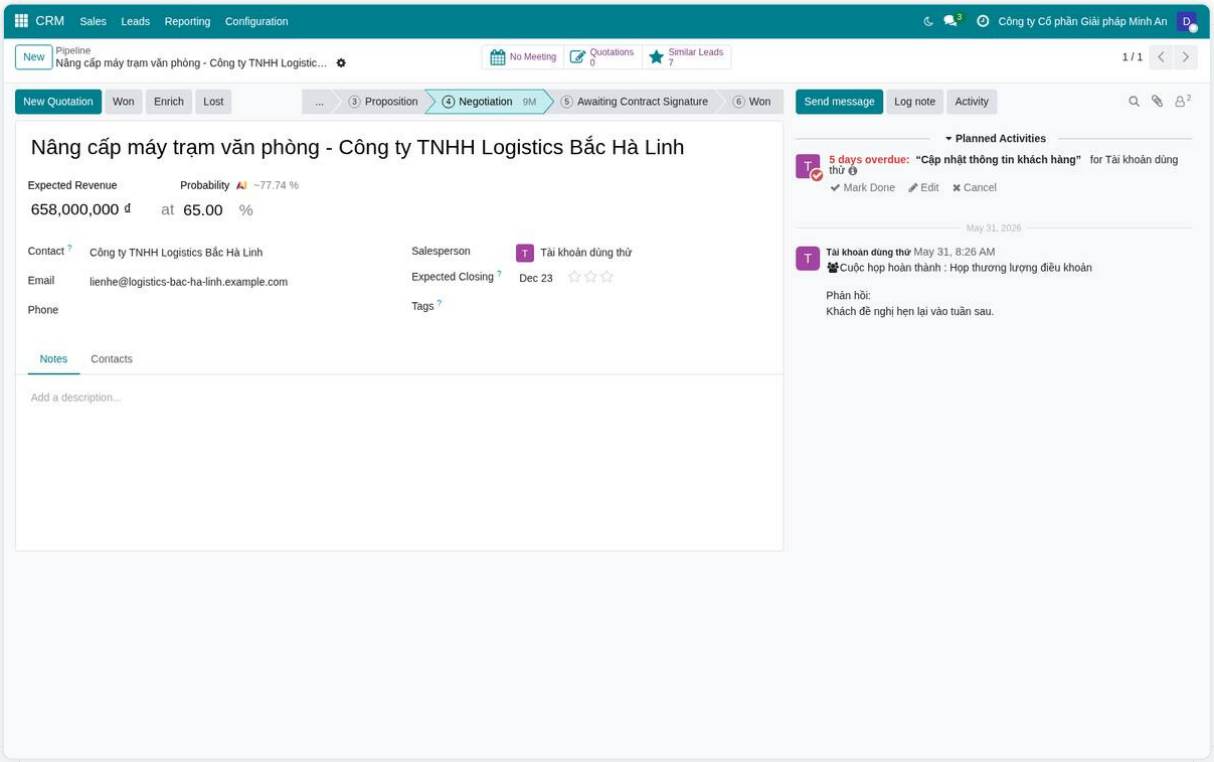


You should see: a quick entry card in the **New** column with the boxes **Company**, **Contact**, the opportunity name, **Contact Email**, **Contact Phone** and the expected revenue box, plus three priority stars. Under the card there is an **Add** button, an **Edit** button that opens the full form, and a trash icon to discard. Click **Add** and the opportunity appears as a card in the column.

Step 2 - Open an opportunity under negotiation

In the **Negotiation** column, click a card, for example **Nâng cấp máy trạm văn phòng - Công ty TNHH Logistics Bắc Hà Linh**.

> *Path:* `CRM > Sales > My Pipeline` , an opportunity card in the **Negotiation** column

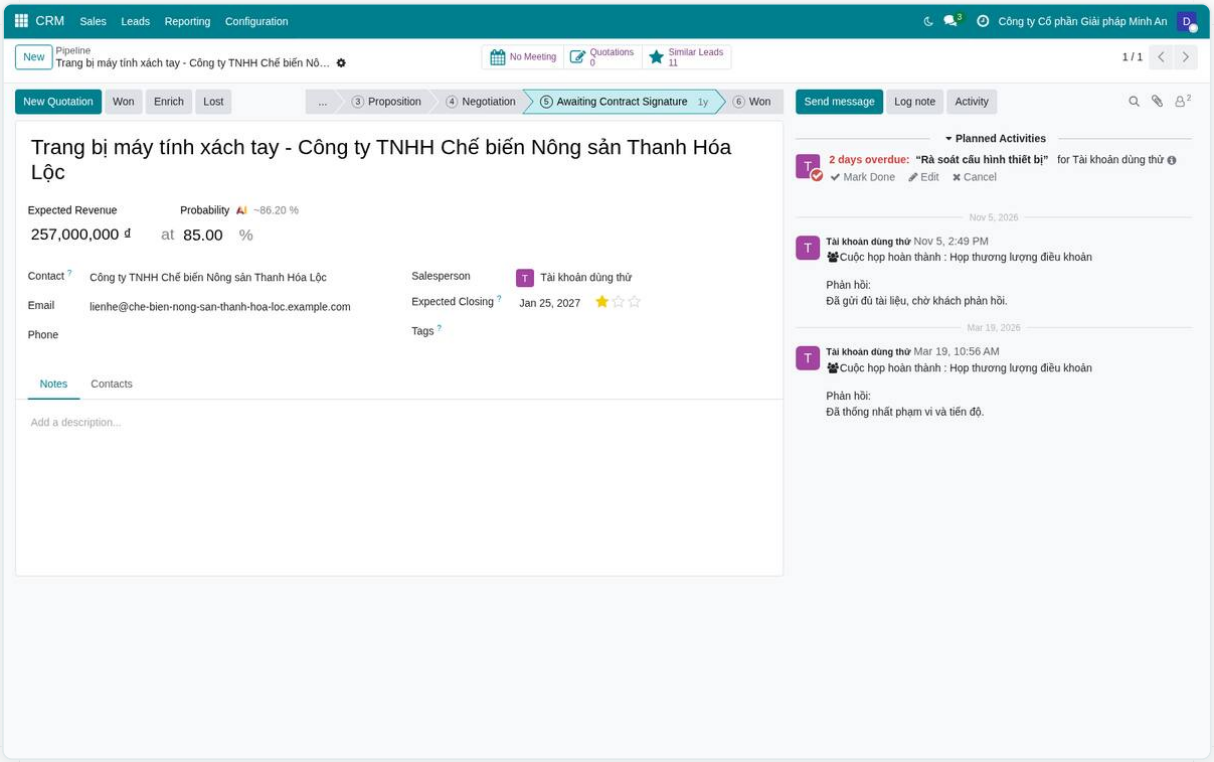


You should see: the status bar at the top is highlighted at **Negotiation**, with the time the opportunity has spent at this stage. The button row at the top of the form has **New Quotation**, **Won**, **Enrich** and **Lost**. The body of the form has **Expected Revenue**, **Probability**, **Contact**, **Salesperson** and **Expected Closing**. The right column shows the conversation history and the planned activities.

Step 3 - Move to the next stage

On the status bar, click the name of the next stage, **Awaiting Contract Signature**. You can also drag the card to the next column on the pipeline screen.

> *Path:* `CRM > Sales > My Pipeline` , open the opportunity, the status bar at the top of the form

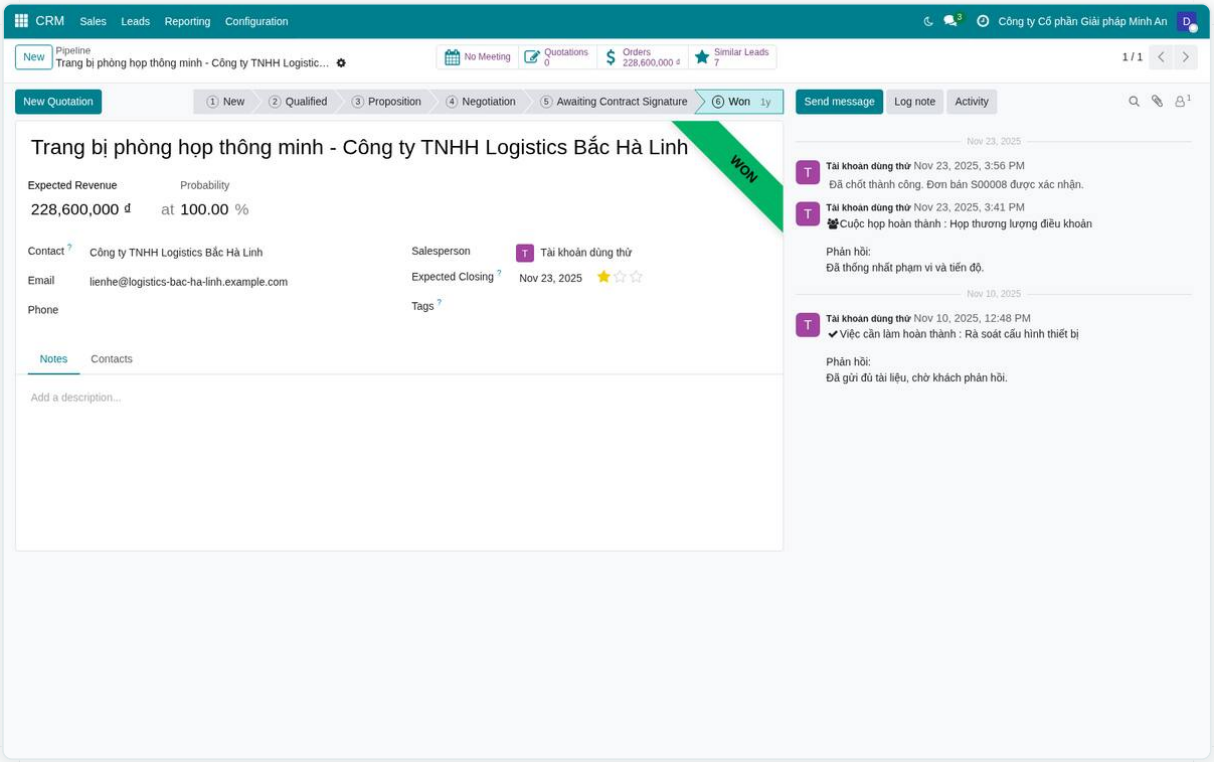


You should see: after you click, the status bar is highlighted at **Awaiting Contract Signature**, like the sample opportunity in the screenshot. The **Probability** at the later stage is higher than at the earlier stage. The **Won** and **Lost** buttons are still there because the opportunity is not closed yet.

Step 4 - Mark as won

When the customer agrees to sign, click **Won** at the top of the form. The screenshot was taken on an opportunity that is already won: **Trang bị phòng họp thông minh - Công ty TNHH Logistics Bắc Hà Linh**.

> *Path:* `CRM > Sales > My Pipeline` , open the opportunity, the **Won** button

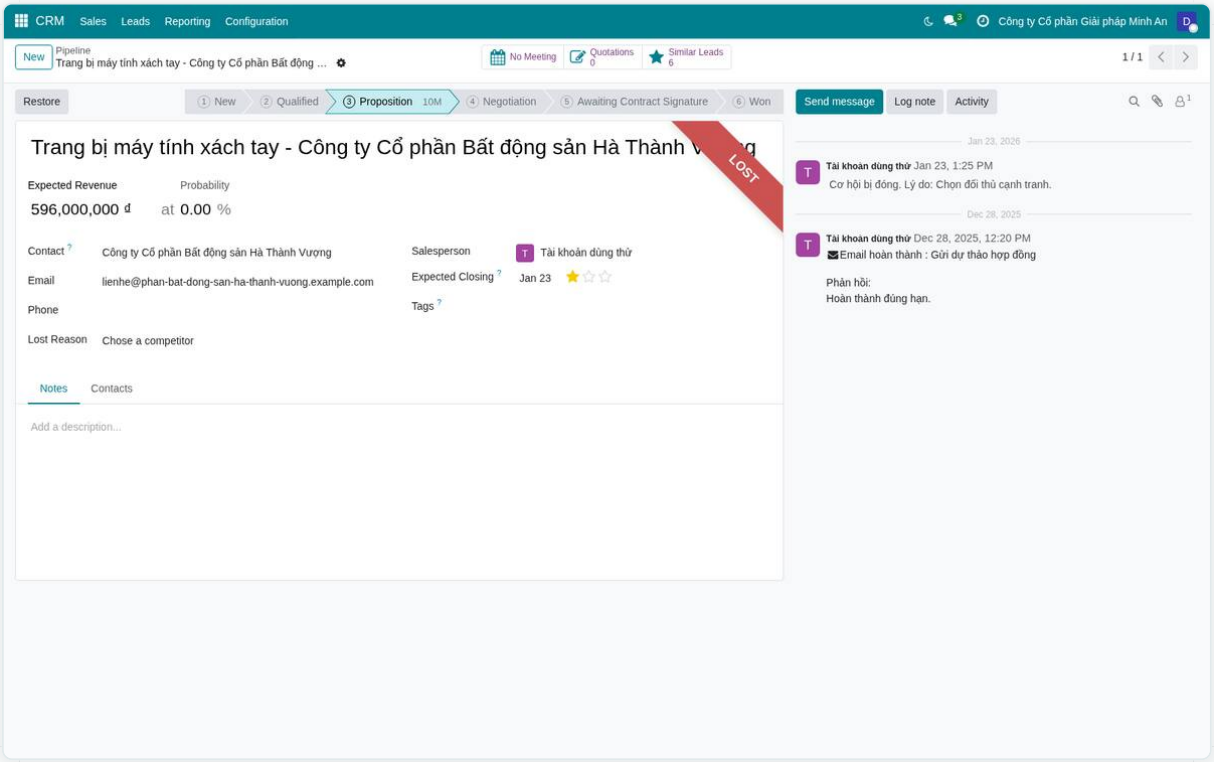


You should see: a green **WON** ribbon in the top right corner of the form; the status bar is highlighted at **Won**; **Probability** is 100. The **Won** and **Lost** buttons are gone. The smart button row at the top has an **Orders** button showing the amount of the sales order that was created; the history box on the right records that the opportunity was closed as won and that sales order S00008 was confirmed.

Step 5 - Mark as lost and record the reason

When the customer declines, click **Lost** at the top of the form, choose a reason in the **Mark Lost** dialog, add a **Closing Note** if needed, then click **Mark as Lost**. The screenshot was taken on an opportunity that is already lost: **Trang bị máy tính xách tay - Công ty Cổ phần Bất động sản Hà Thành Vượng**.

> *Path:* `CRM > Sales > My Pipeline` , open the opportunity, the **Lost** button



You should see: a red **LOST** ribbon in the top right corner; the **Lost Reason** field shows "Chose a competitor"; **Probability** is 0; only the **Restore** button remains at the top of the form, to reopen the opportunity. The history box on the right records that the opportunity was closed, with the reason "Chose a competitor". A lost opportunity is archived, so it no longer appears on the kanban board.

Try it yourself: enter a real opportunity of your company in the **New** column, move it step by step to **Awaiting Contract Signature**, then mark it **Won**; then enter another opportunity and mark it **Lost** with the reason **Too expensive** to see the two results in the report of the lesson *Sales pipeline, win/loss rate and lost reasons*.

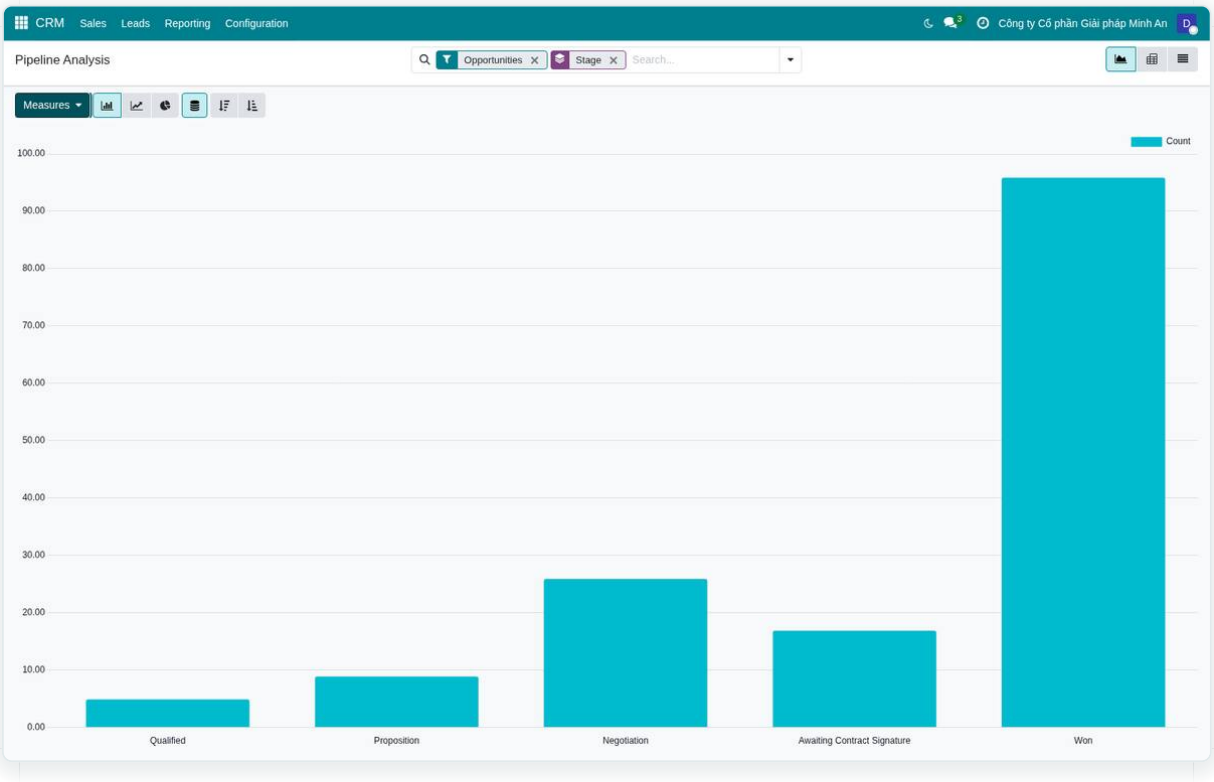
03 SALES PIPELINE, WIN/LOSS RATE AND LOST REASONS

About 20 minutes. By the end of this lesson your company can read three management questions: how many opportunities are at each stage, how many are won and lost each month, and why the team is losing. All three use the same report; only the grouping and the measure change.

Step 1 - View the pipeline by stage

Open the report, click the arrow at the end of the search box and choose **Stage** under **Group By**. Click **Measures**, choose **Count** and clear **Prorated Revenue**.

> *Path:* `CRM > Reporting > Pipeline`

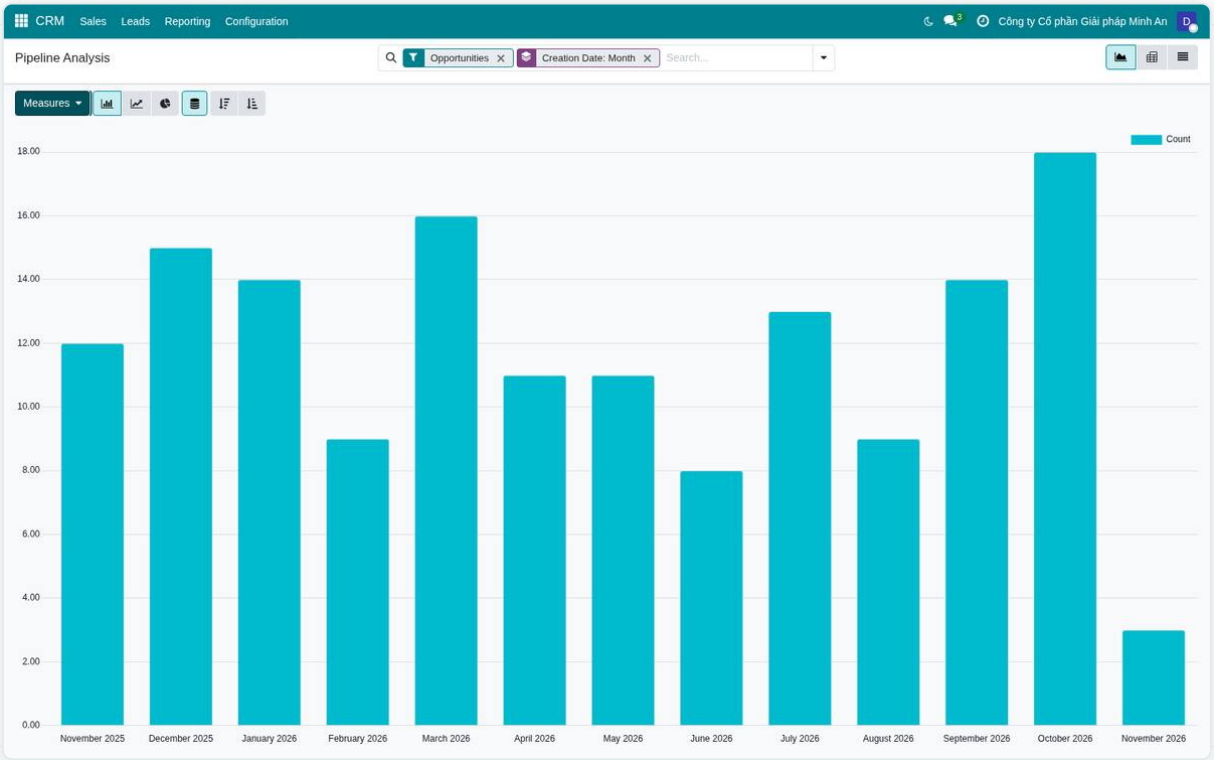


You should see: a bar chart with five bars in stage order: **Qualified** 5 opportunities, **Proposition** 9, **Negotiation** 26, **Awaiting Contract Signature** 17 and **Won** 96. The **New** stage has no bar because no opportunity is there. The **Won** bar is the tallest because it includes every opportunity won in the data period.

Step 2 - View new opportunities by month

In the search box, remove the **Stage** grouping, open the arrow again, choose the **Creation Date** group and then choose **Month**. Keep the **Count** measure.

> *Path:* `CRM > Reporting > Pipeline`

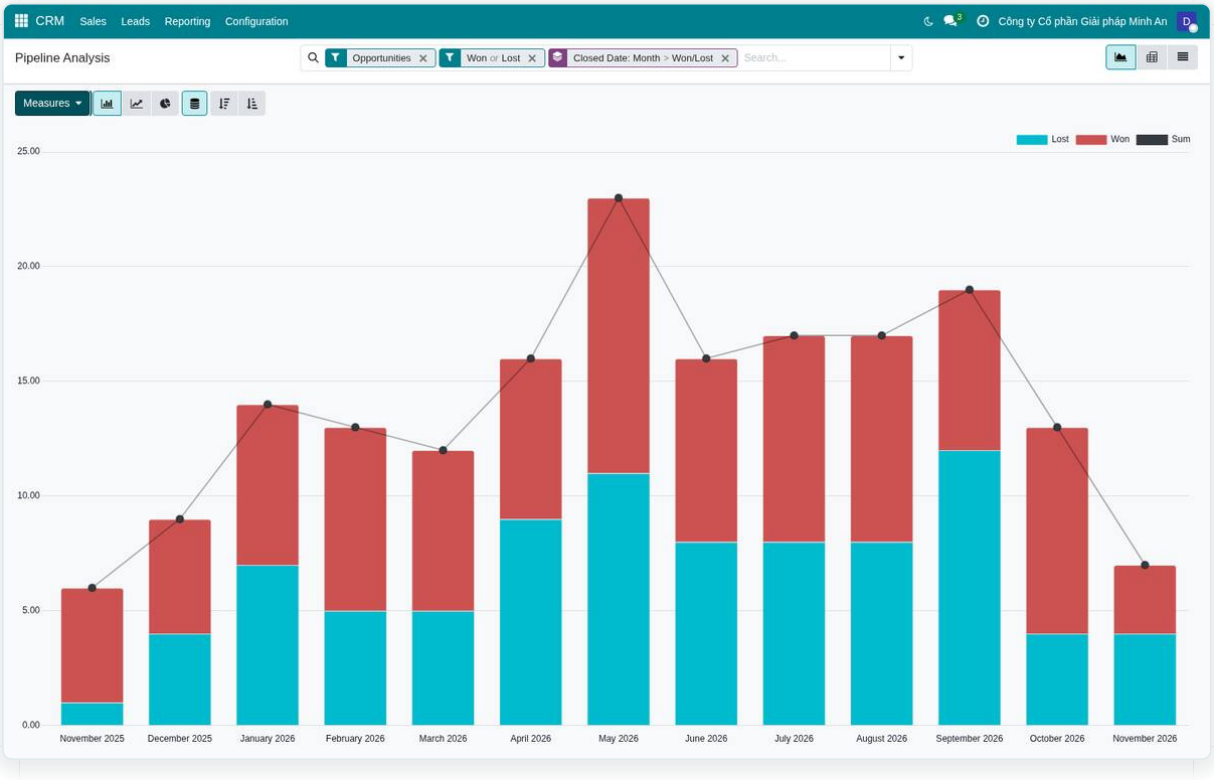


You should see: 13 bars, one per month, from November 2025 to November 2026. The last bar is the lowest because only a few days of November 2026 have passed. The chart counts only opportunities that are still active or won; lost opportunities are covered in the next step.

Step 3 - View won and lost by month

Open the arrow of the search box, turn on both the **Won** and **Lost** filters, choose the **Closed Date** group by **Month**, then add the custom group **Won/Lost**.

> *Path:* `CRM > Reporting > Pipeline`

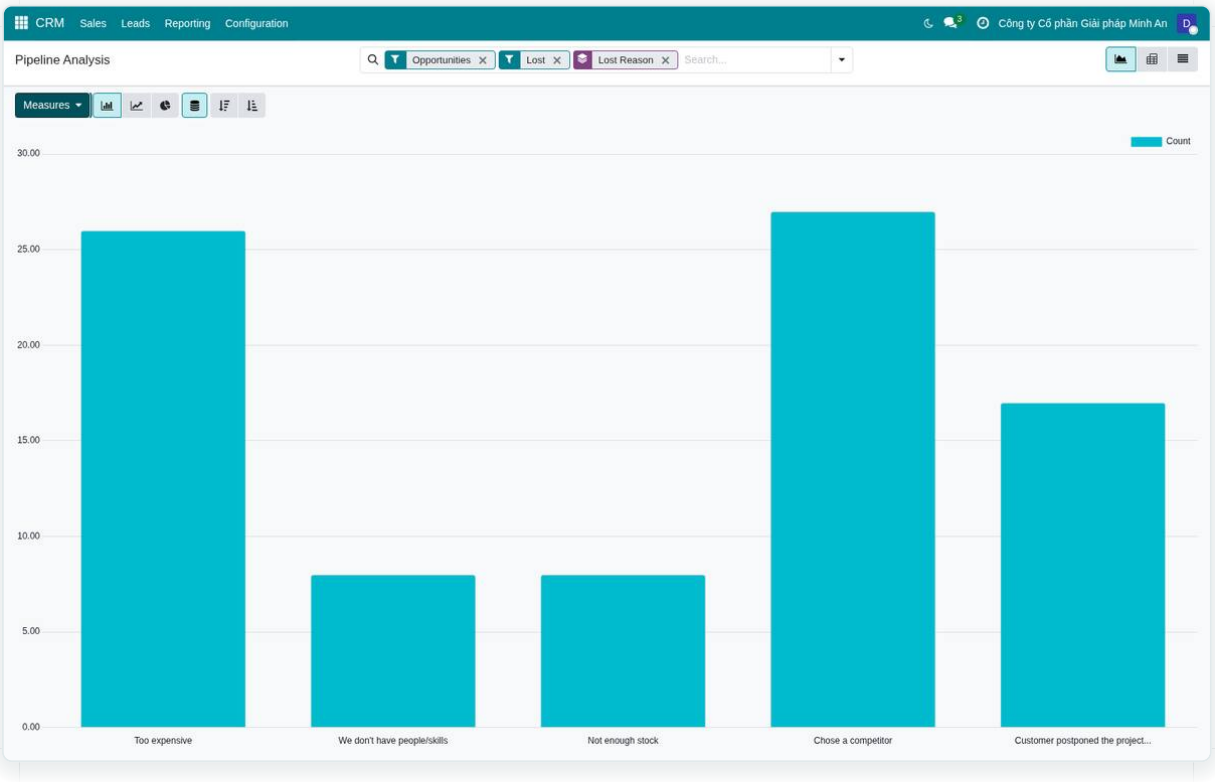


You should see: one bar per month, split in two colors for won and lost opportunities; the legend in the top right corner shows **Lost**, **Won** and **Sum**. May 2026 is the month with the most closings, with 12 won and 11 lost opportunities. Adding up all the bars gives 96 won and 86 lost opportunities, a win rate of about 53%.

Step 4 - View the lost reasons

Remove the **Won** filter and the **Closed Date** group, keep the **Lost** filter, and choose the **Lost Reason** group.

> *Path:* `CRM > Reporting > Pipeline`



You should see: five bars, one per lost reason: **Too expensive** 26, **We don't have people/skills** 8, **Not enough stock** 8, **Chose a competitor** 27 and **Customer postponed the project or budget** 17. The two biggest reasons are choosing a competitor and being too expensive, both related to price and competitiveness.

Try it yourself: in the won and lost report, add the **Salesperson** group to compare each person, or switch to table form with the **Pivot View** button in the top right corner.

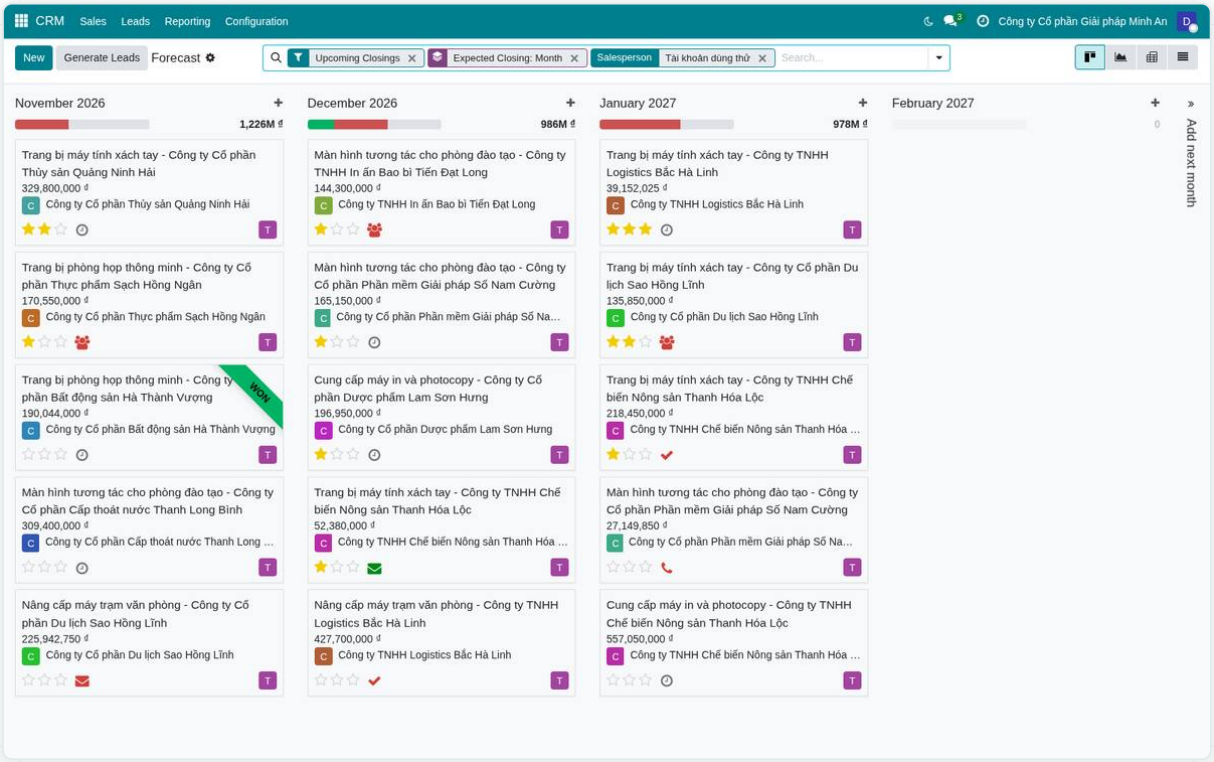
04 REVENUE FORECAST BY EXPECTED CLOSING MONTH

About 10 minutes. By the end of this lesson your company can see in which month the open opportunities are expected to close and the total forecast revenue of each month, to prepare staff and goods.

Step 1 - View the forecast as columns by month

Open the forecast report; the system already groups the opportunities by expected closing month.

> *Path:* `CRM > Reporting > Forecast`

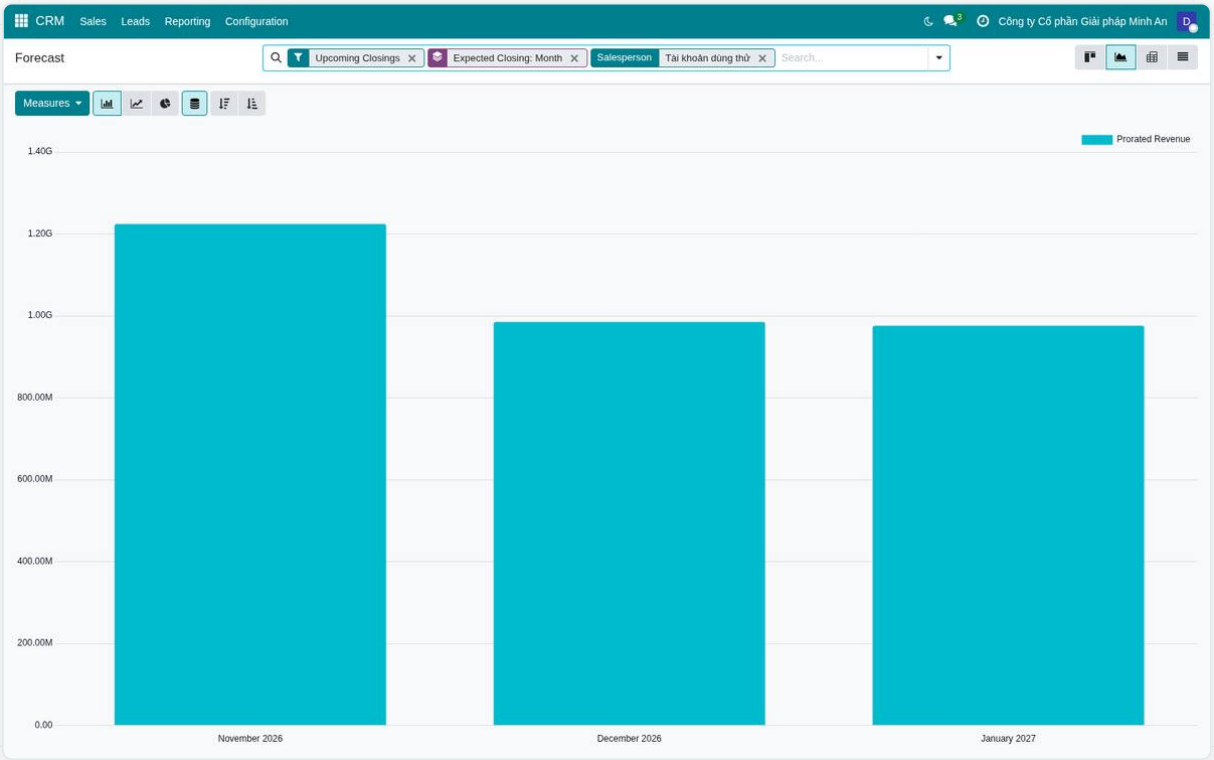


You should see: the columns are the expected closing months; in the screenshot taken on 09/11/2026 they start from November 2026. At the top of each column is the forecast revenue total, weighted by probability. The search box has three default conditions: **Upcoming Closings**, **My Pipeline** and **Expected Closing: Month**. (In the screenshot, a filter on the salesperson of the demo account stands in for **My Pipeline**.) Each card is an open opportunity.

Step 2 - Switch to the chart

In the top right corner, click the **Graph View** button.

> *Path:* `CRM > Reporting > Forecast` , the **Graph View** button in the top right corner



You should see: each expected closing month is one bar, and the legend reads **Prorated Revenue**. The vertical axis uses short units: **M** is million and **G** is billion.

Try it yourself: click the X on the **My Pipeline** filter to see the forecast of the whole company instead of only the account that is logged in.

PART II. SALES

This part answers the questions: how does your company prepare a quotation for a customer, send it, turn it into a sales order, and, at the end of the month, where to look to know how much was sold, who sold it and what was sold. Sales managers and salespeople should read this part first; directors only need the lesson *Sales analysis by month, salesperson and product*. Sales works together with CRM: a won opportunity in CRM creates the sales order here, so the two parts share customers and salespeople.

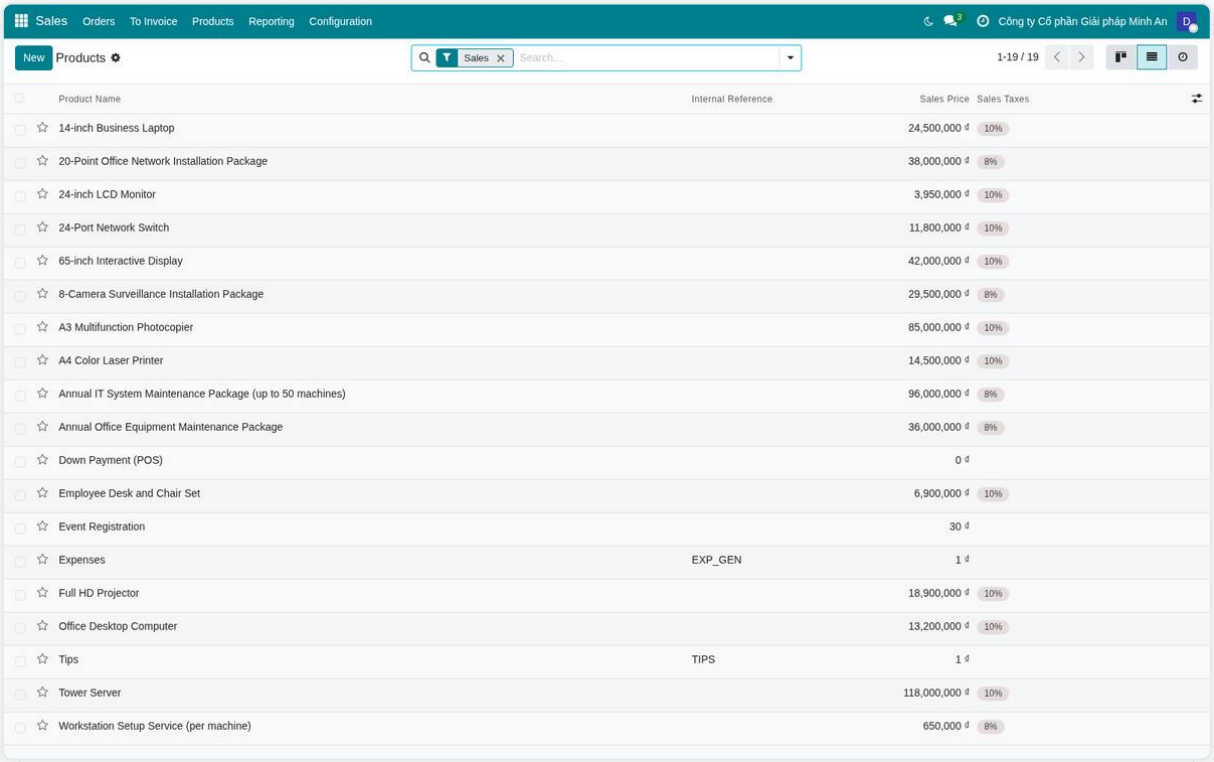
05 SET UP SALES: PRODUCTS AND PRICELISTS

About 15 minutes. By the end of this lesson your company knows which products are in the catalog, which information a product carries, how the pricelist in use works, and can create a new product and a new pricelist. The screenshots of new items were taken with the form filled in but not saved, so the sample data is not changed.

Step 1 - View the product catalog

Open the **Sales** application, open the product list, then click the list-view button in the top right corner.

> *Path:* `Sales > Products > Products`

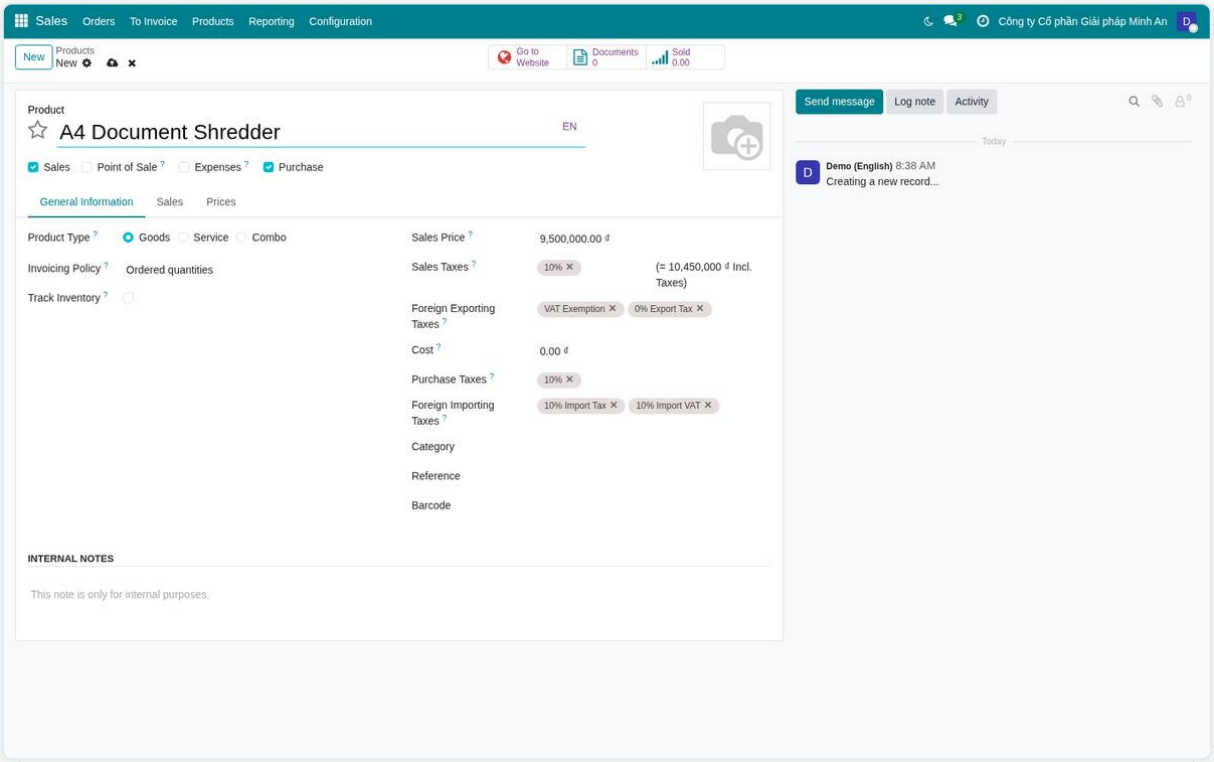


You should see: a list of 19 rows with the columns **Product Name**, **Internal Reference**, **Sales Price** and **Sales Taxes**. Of these, 15 rows are the company's products and services in four groups: office equipment 5, IT equipment 5, installation packages 3 and maintenance packages 2. Goods are taxed at 10% and services at 8%. The other four rows, such as **Expenses** and **Tips**, are items the system uses internally and carry no tax.

Step 2 - Create a new product

Click **New** in the top left corner, type the name in the large box at the top of the form, for example **A4 Document Shredder**, then type the **Sales Price**.

> *Path:* `Sales > Products > Products` , the **New** button

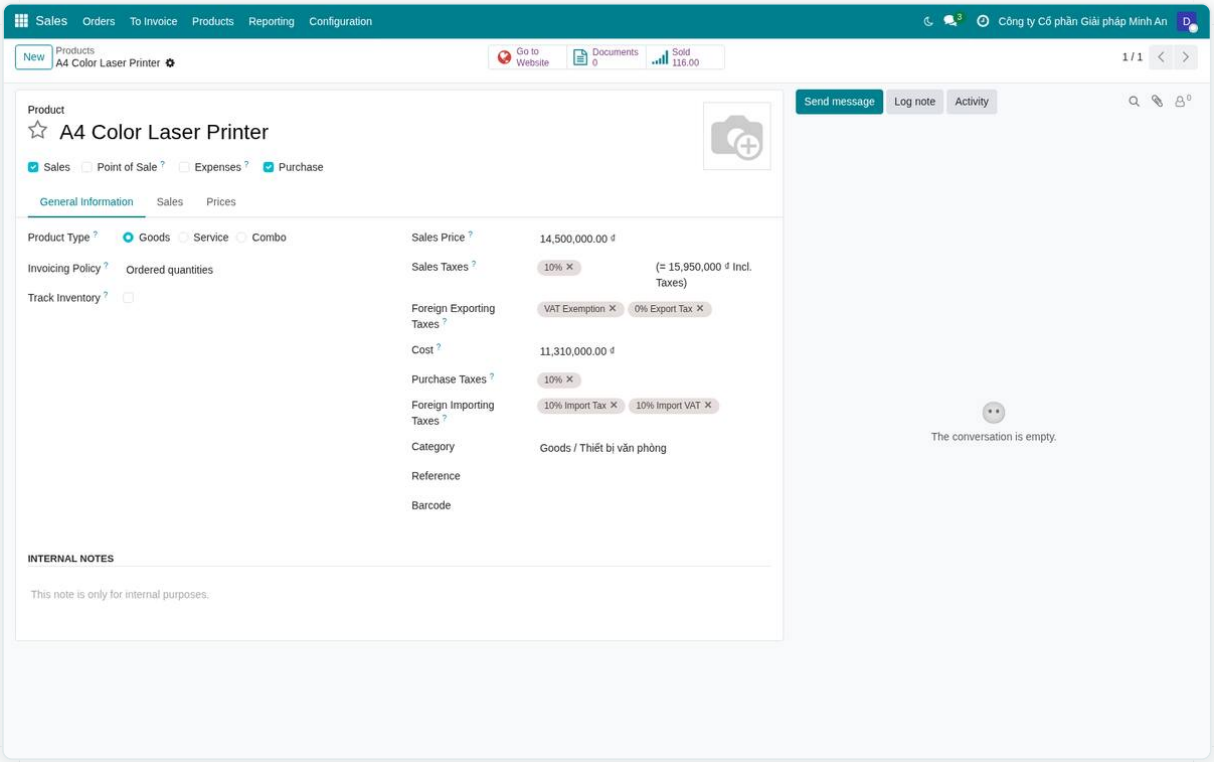


You should see: the name box contains the text you typed; the **Sales** and **Purchase** checkboxes are already ticked, and **Product Type** is Goods. The **Sales Price** box shows 9,500,000 and next to it the price including tax, 10,450,000, because **Sales Taxes** is filled in automatically with 10%. **Cost** is still 0.00 and **Category** is still empty for your company to choose. The title at the top still reads "New" because the record is not saved.

Step 3 - Open an existing product to see its information

Click the row **A4 Color Laser Printer** in the product list.

> *Path:* `Sales > Products > Products` , the row **A4 Color Laser Printer**

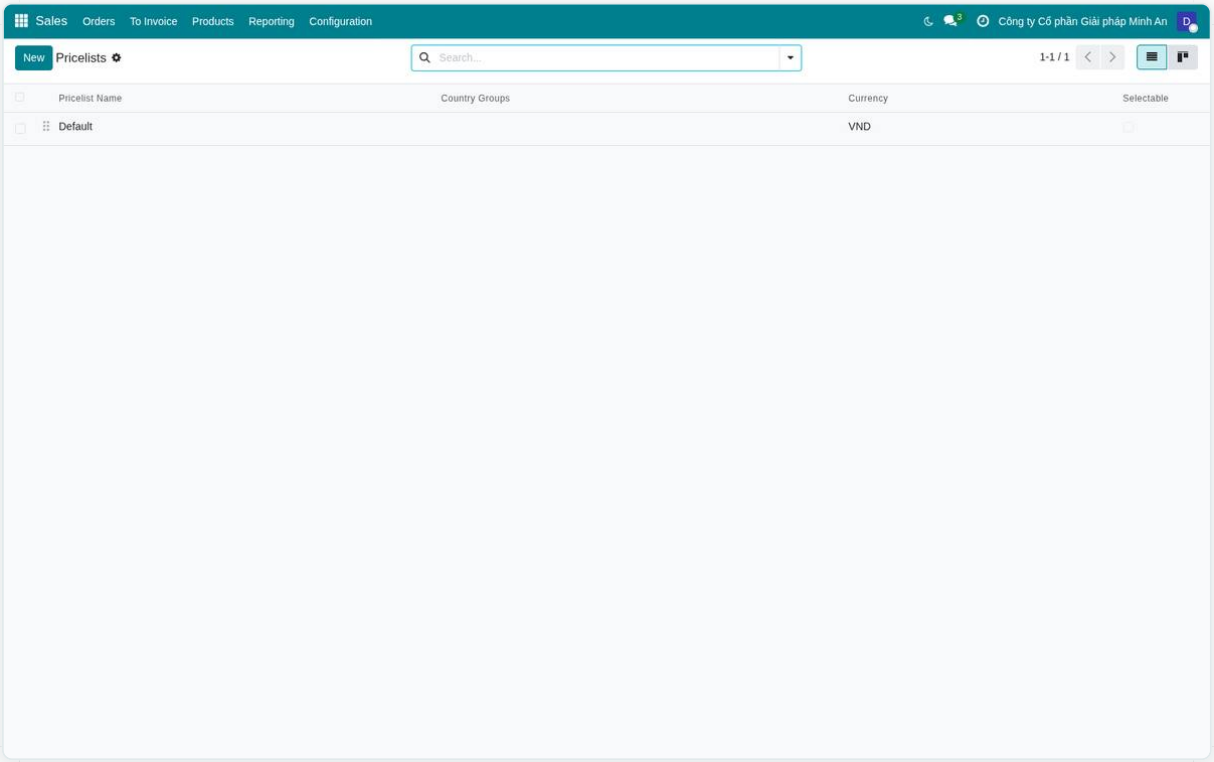


You should see: the title **A4 Color Laser Printer**, the **Sales** and **Purchase** checkboxes ticked, and **Product Type** set to Goods. On the right are **Sales Price** 14,500,000, **Sales Taxes** 10% (with the price including tax, 15,950,000), **Cost** 11,310,000 and **Category** "Goods / Thiết bị văn phòng", the office equipment group. The tabs **General Information**, **Sales** and **Prices** hold the rest.

Step 4 - View the pricelist in use

Open the list of pricelists.

> *Path:* `Sales > Products > Pricelists`

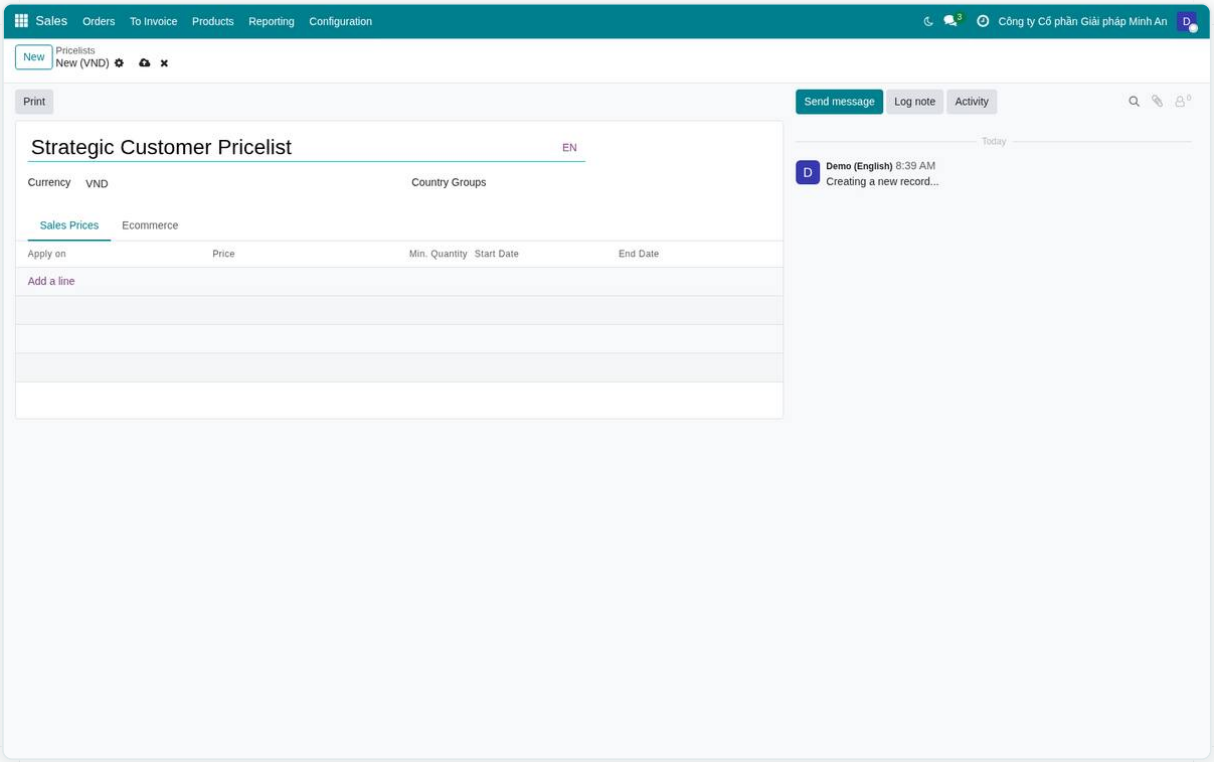


You should see: one pricelist named **Default**, with currency VND. Every quotation takes this pricelist by default.

Step 5 - Create a new pricelist

Click **New** in the top left corner, then type the pricelist name in the large box at the top of the form, for example **Strategic Customer Pricelist**.

> *Path:* `Sales > Products > Pricelists` , the **New** button



You should see: the name box contains the text you typed; **Currency** is VND; the **Sales Prices** tab has a table with the columns **Apply on**, **Price**, **Min. Quantity**, **Start Date** and **End Date** and an **Add a line** link for setting a separate price for each product. The title at the top still reads "New (VND)" because the record is not saved.

Try it yourself: create a product or service of your own with a sales price and 10% tax, then create a separate pricelist for a group of customers and set a lower price for that product with the **Add a line** link.

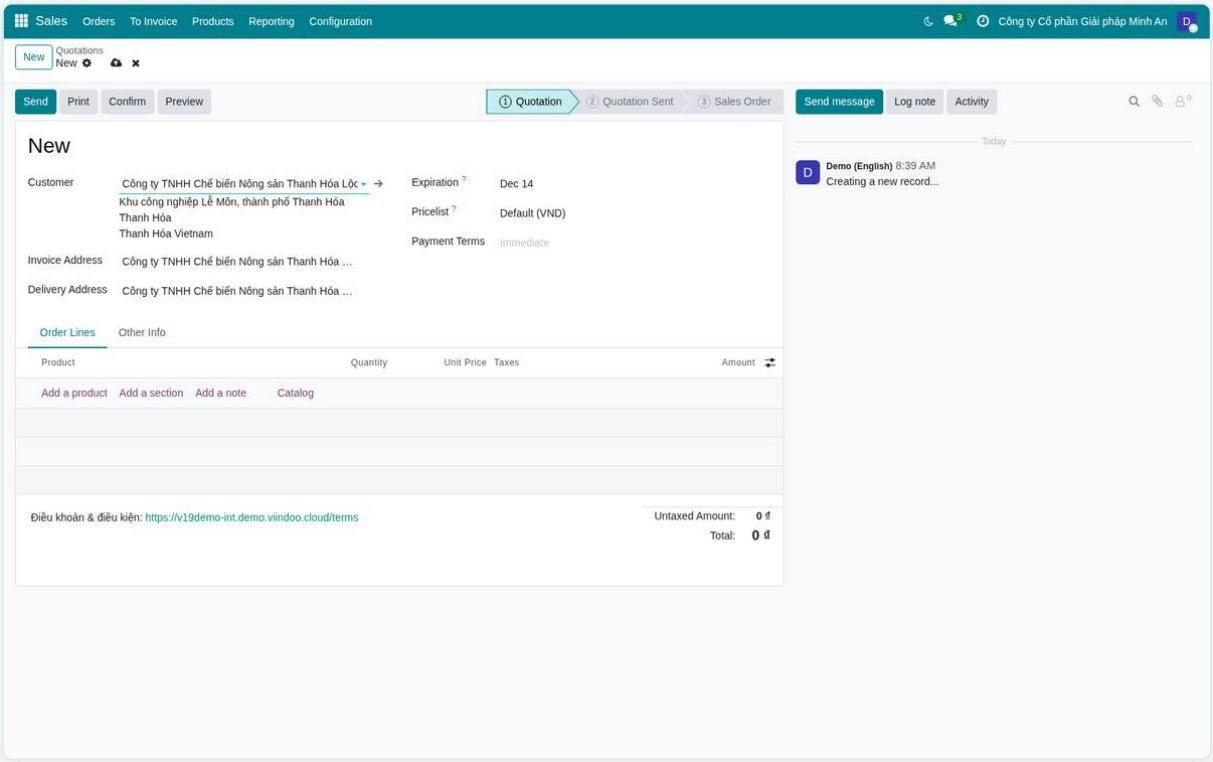
06 PREPARE A QUOTATION, SEND IT TO THE CUSTOMER AND CONFIRM IT AS A SALES ORDER

About 20 minutes. By the end of this lesson your company has followed the whole path of an order: prepare a quotation for a customer, add products, choose payment terms, send it, then confirm it as a sales order. The send and confirm steps were captured on a quotation and an order that are already in that state; the status buttons were not clicked on the sample data. When you do it yourself, click the buttons indicated. The demo system does not send real email to the outside.

Step 1 - Open a new quotation and choose the customer

Click **New**, type **Thanh Hóa Lộc** in the **Customer** box, then choose **Công ty TNHH Chế biến Nông sản Thanh Hóa Lộc** in the list that appears.

> *Path:* `Sales > Orders > Quotations` , the **New** button

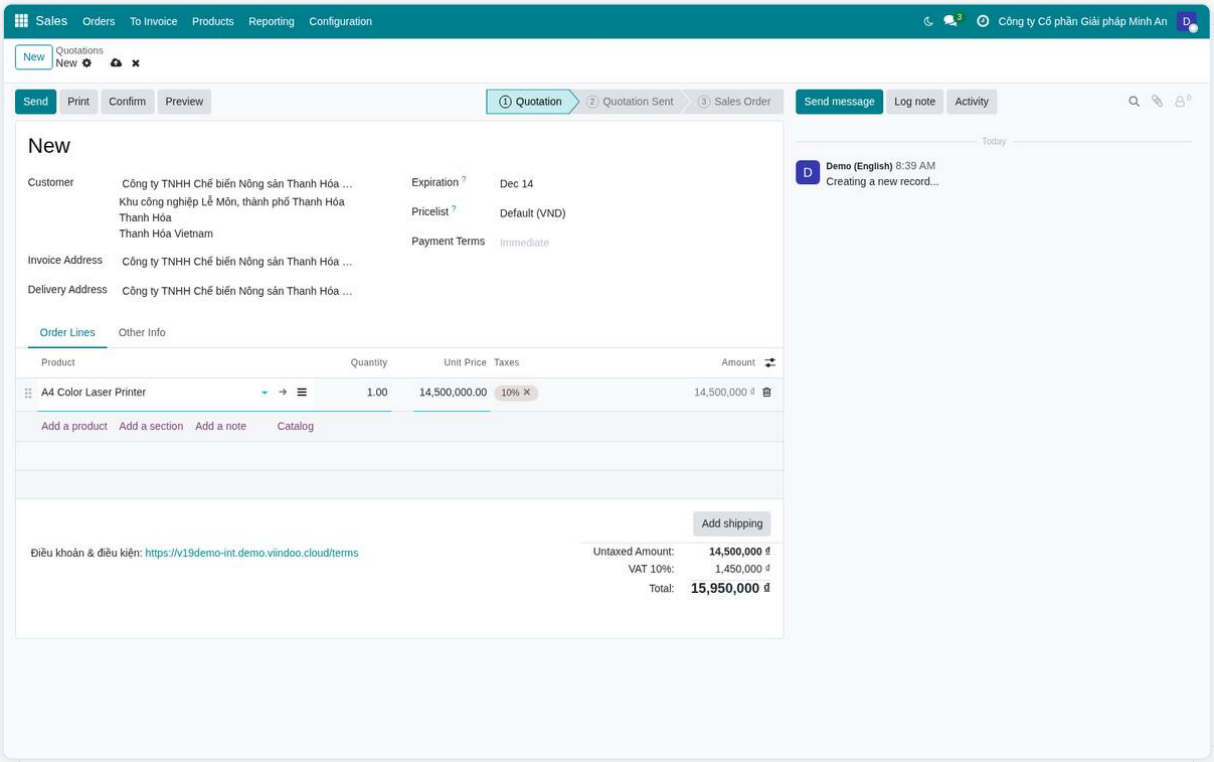


You should see: the customer's address appears right under the name; **Invoice Address** and **Delivery Address** are filled in from the customer; **Pricelist** is **Default (VND)**; **Payment Terms** is still empty, showing the faded word "Immediate". The quotation title still reads "New" because the record is not saved.

Step 2 - Add a product line

In the **Order Lines** tab, click **Add a product**, type **Laser Printer**, then choose **A4 Color Laser Printer**.

> *Path:* `Sales > Orders > Quotations` , the **Order Lines** tab, the **Add a product** link

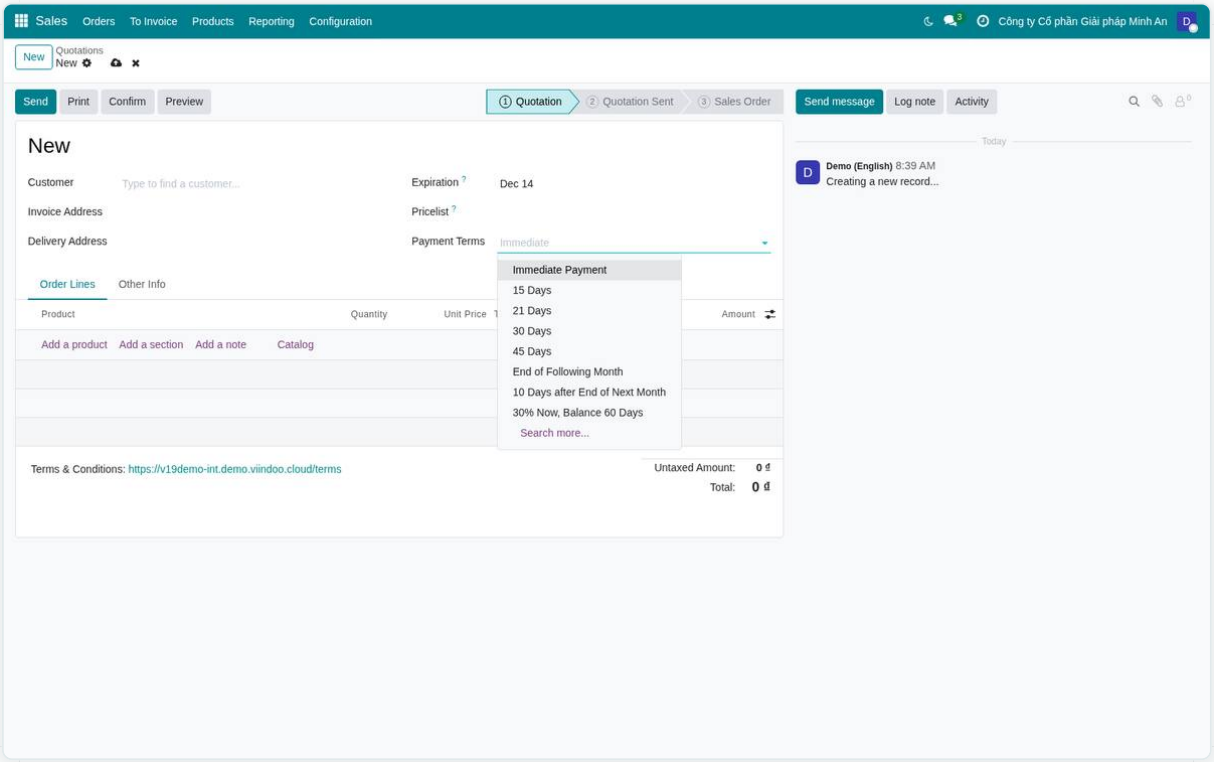


You should see: one line **A4 Color Laser Printer** with **Quantity** 1.00, **Unit Price** 14,500,000 taken from the product's sales price, and **Taxes** 10%. The totals at the bottom of the quotation show **Untaxed Amount** 14,500,000, **VAT 10%** 1,450,000 and **Total** 15,950,000.

Step 3 - Choose payment terms

Click the **Payment Terms** box and choose one of the terms in the list.

> *Path:* `Sales > Orders > Quotations` , the **Payment Terms** box

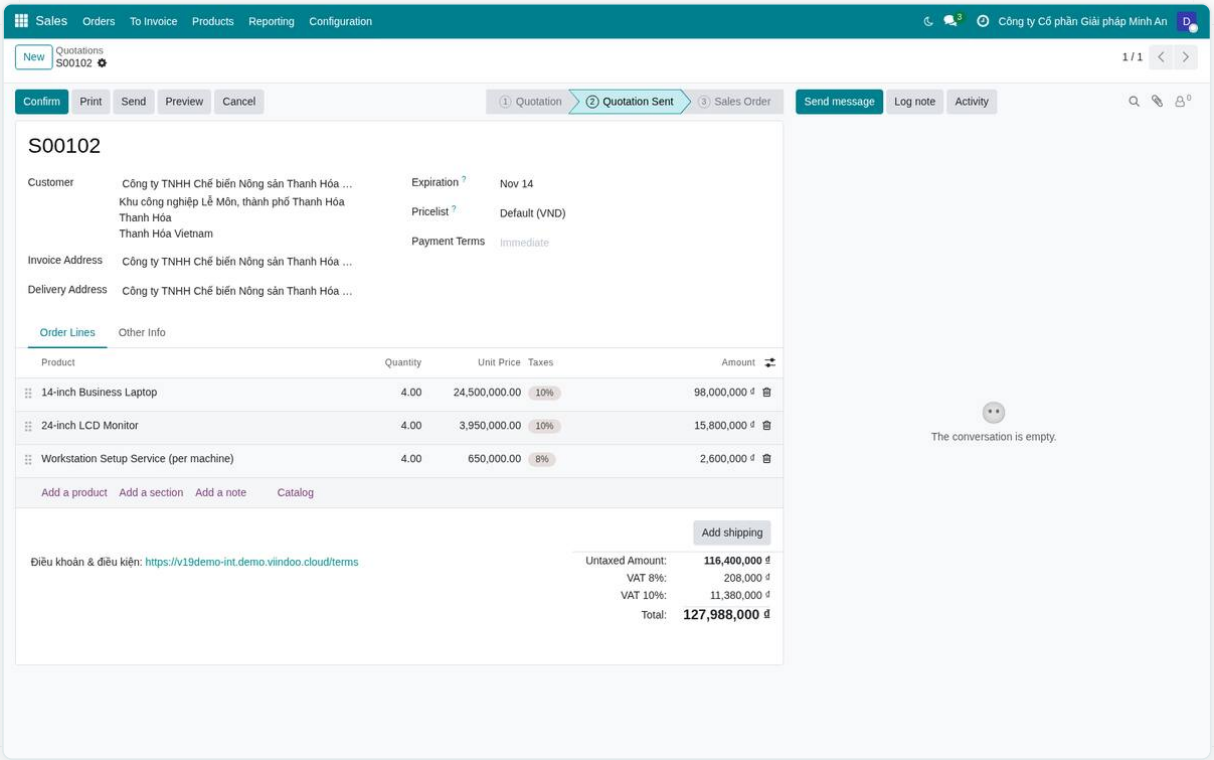


You should see: the list of available terms: **Immediate Payment**, **15 Days**, **21 Days**, **30 Days**, **45 Days**, **End of Following Month**, **10 Days after End of Next Month** and **30% Now, Balance 60 Days**; the **Search more...** link opens the remaining terms, 10 terms in total. The `demo` account can choose a term but cannot create new terms. The **Terms & Conditions** line at the bottom of the quotation is a link to the general sales conditions.

Step 4 - Send the quotation to the customer

Click **Send** at the top of the quotation, check the prepared email, then send it. The screenshot was taken on a quotation that has already been sent: **S00102**, customer **Công ty TNHH Chế biến Nông sản Thanh Hóa Lộc**.

> *Path:* `Sales > Orders > Quotations` , open a quotation, the **Send** button

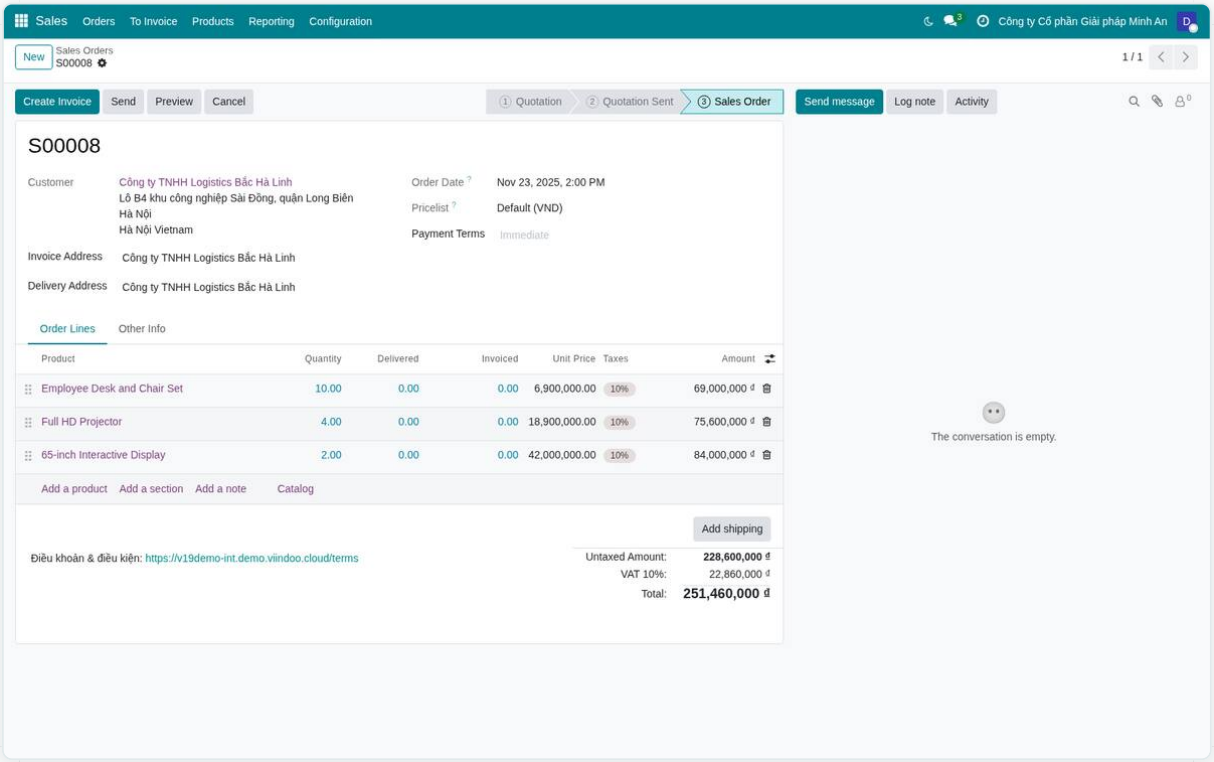


You should see: the status bar is highlighted at **Quotation Sent**. The top of the form still has the **Confirm** button to close the deal, together with **Print**, **Send**, **Preview** and **Cancel**. The tax table at the bottom of the quotation has two lines because the quotation contains both goods taxed at 10% and services taxed at 8%.

Step 5 - Confirm it as a sales order

When the customer agrees, click **Confirm** at the top of the quotation. The screenshot was taken on an order that is already confirmed: **S00008**, customer **Công ty TNHH Logistics Bắc Hà Linh**, the order of the won opportunity in the CRM part.

> *Path:* `Sales > Orders > Orders` , open the order, the **Confirm** button of the quotation



You should see: the status bar is highlighted at **Sales Order**; the top of the form shows the buttons **Create Invoice**, **Send**, **Preview** and **Cancel**, and the **Confirm** button is gone. The order lines table has two more columns, **Delivered** and **Invoiced**, both at 0.00 because nothing has been delivered or invoiced yet.

Try it yourself: prepare a quotation for one of your customers with two products, choose the **30 Days** payment term, send it and confirm it as an order.

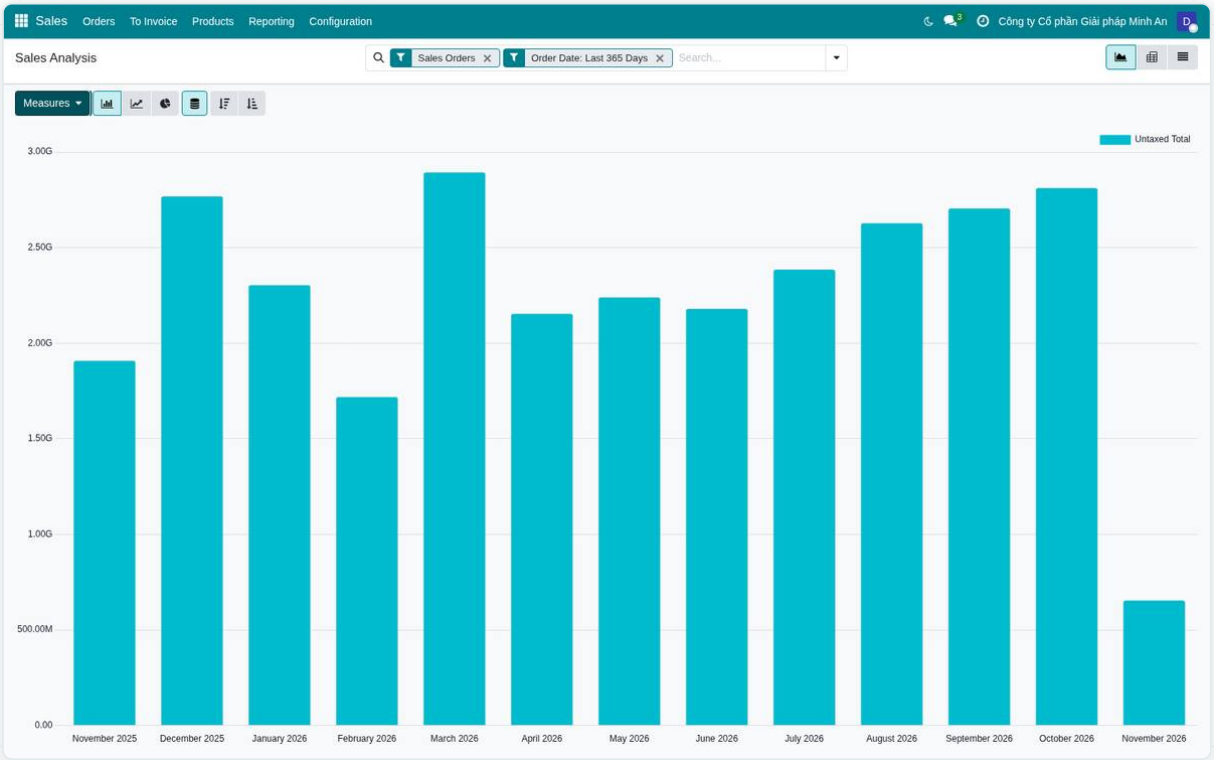
07 SALES ANALYSIS BY MONTH, SALESPERSON AND PRODUCT

About 15 minutes. By the end of this lesson your company can answer three management questions: which month sells the most, which salesperson sells the most, and which product sells best. All three reports are calculated on the sales orders of the last 365 days, in untaxed amounts.

Step 1 - View sales by month

Open the sales report.

> *Path:* `Sales > Reporting > Sales`

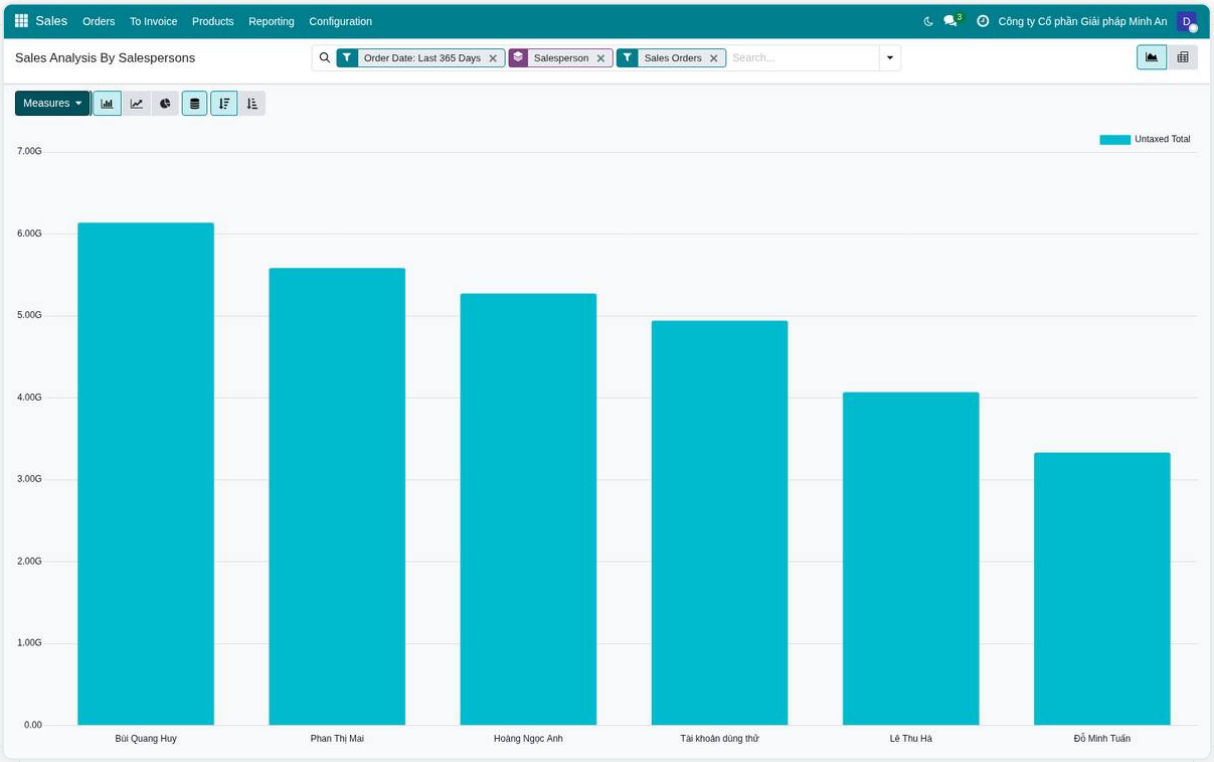


You should see: a bar chart of **Untaxed Total** by month, with the two filters **Sales Orders** and **Order Date: Last 365 Days**; there are 13 bars from November 2025 to November 2026. March 2026 is the highest, at about VND 2.90 billion. February 2026 is the lowest of the complete months, at about VND 1.72 billion, because of the Tet holiday. The last bar is low, about VND 0.66 billion, because only a few days of November 2026 have passed.

Step 2 - View sales by salesperson

Open the report by salesperson. Click the arrow at the end of the search box and turn on the **Sales Orders** filter so that only confirmed orders are counted. Click **Measures**, choose **Untaxed Total** and clear **Qty Ordered**.

> *Path:* `Sales > Reporting > Salespersons`

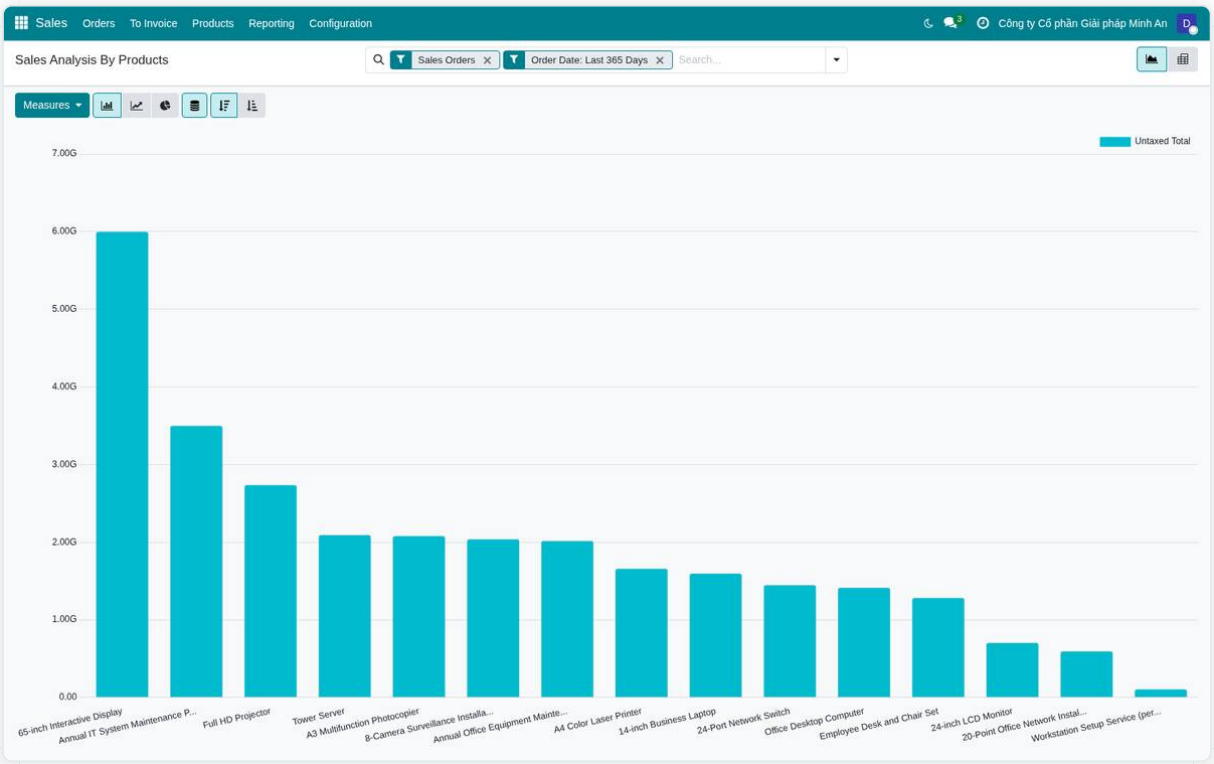


You should see: the search box has three conditions, **Order Date: Last 365 Days**, **Salesperson** and **Sales Orders**. Six bars, one per salesperson, ordered from highest to lowest: **Bùi Quang Huy**, **Phan Thị Mai**, **Hoàng Ngọc Anh**, **Tài khoản dùng thử**, **Lê Thu Hà** and **Đỗ Minh Tuấn**. The vertical axis uses short units: **G** is billion dong.

Step 3 - View sales by product

Open the report by product, click the bar chart button, click **Measures**, choose **Untaxed Total** and clear **Qty Ordered**, then click the descending sort button.

> *Path:* `Sales > Reporting > Products`



You should see: fifteen bars, one per product or service of the company, ordered from highest to lowest. The tallest bar is **65-inch Interactive Display**, at about VND 6.01 billion; the lowest is **Workstation Setup Service (per machine)**. The product names are cut off on the horizontal axis because they are long.

Try it yourself: click the **Pivot View** button in the top right corner to switch to table form, then expand each product by month to see which products sell steadily and which sell in bursts.

PART III. EMPLOYEES

This part answers the question: **for a company with 5 departments and more than forty people, where do the HR records, job titles, contracts and the organization chart live, and how much can your company set up on its own?** The director reads the last lesson to see the organization chart. HR staff follow the first three lessons. The data is sample data of the fictional company "Công ty Cổ phần Giải pháp Minh An", not your company's data.

The part has three lessons: one on setting up departments and job positions, one on creating an employee with a contract, and one on viewing the organization chart. You can try things out, but the demo system is reloaded every night, so no change is kept. The screenshots in this part were taken on 09/11/2026; screenshots of new records were taken with the form filled in but not saved. The English screenshots show the same records as the Vietnamese ones, so a few typed values (job titles and descriptions typed on a record) appear as they were typed.

08 SET UP DEPARTMENTS AND JOB POSITIONS

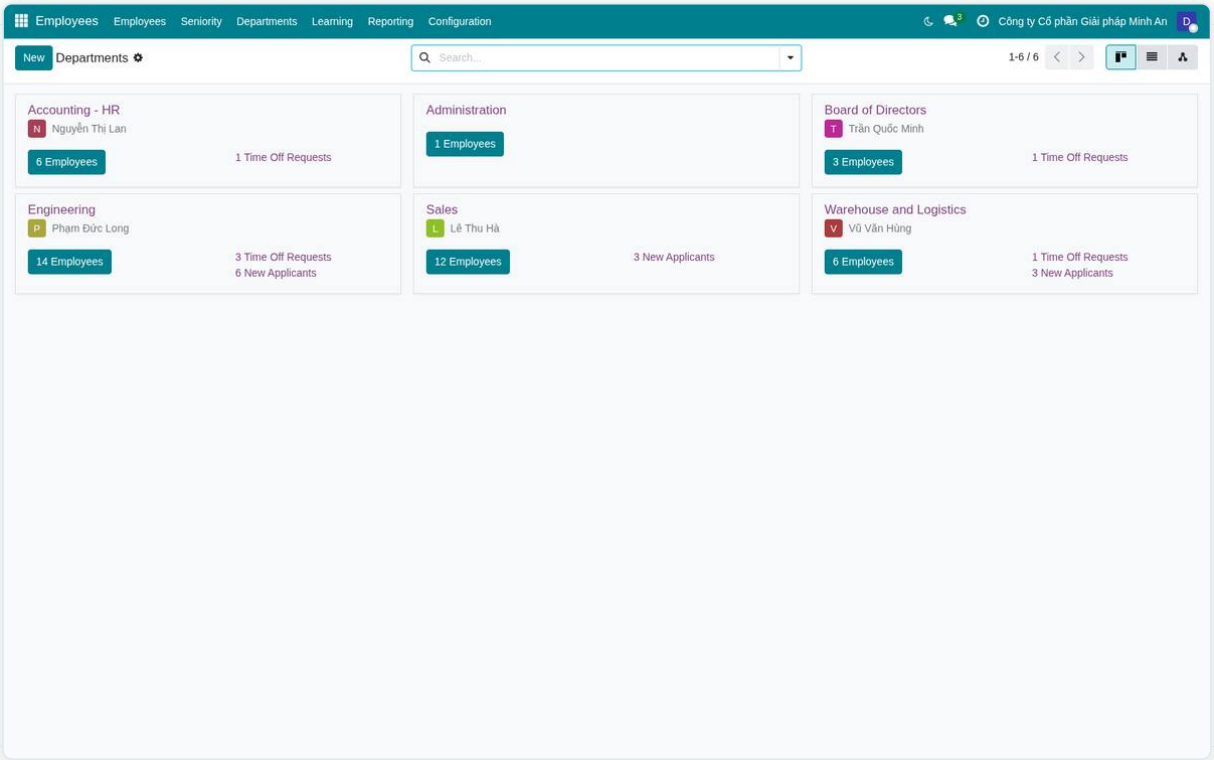
About 10 minutes. By the end of this lesson your company can read the 6 departments of the company, open a department to see its manager and parent department, add a new department, read the list of 4 job positions, and tell a "job position" apart from a "job title" on an employee record.

Log in with the account `demo` / `demo` as in the section "How to use this handbook". This account has the right to manage Employees.

Step 1 - Open the list of departments

Click **Departments** in the top menu bar of the Employees app.

> *Path:* `Employees > Departments`



You should see: 6 department cards. Each card shows the department name, the manager, an **Employees** button with the head count and, where they exist, the lines **Time Off Requests** and **New Applicants**.

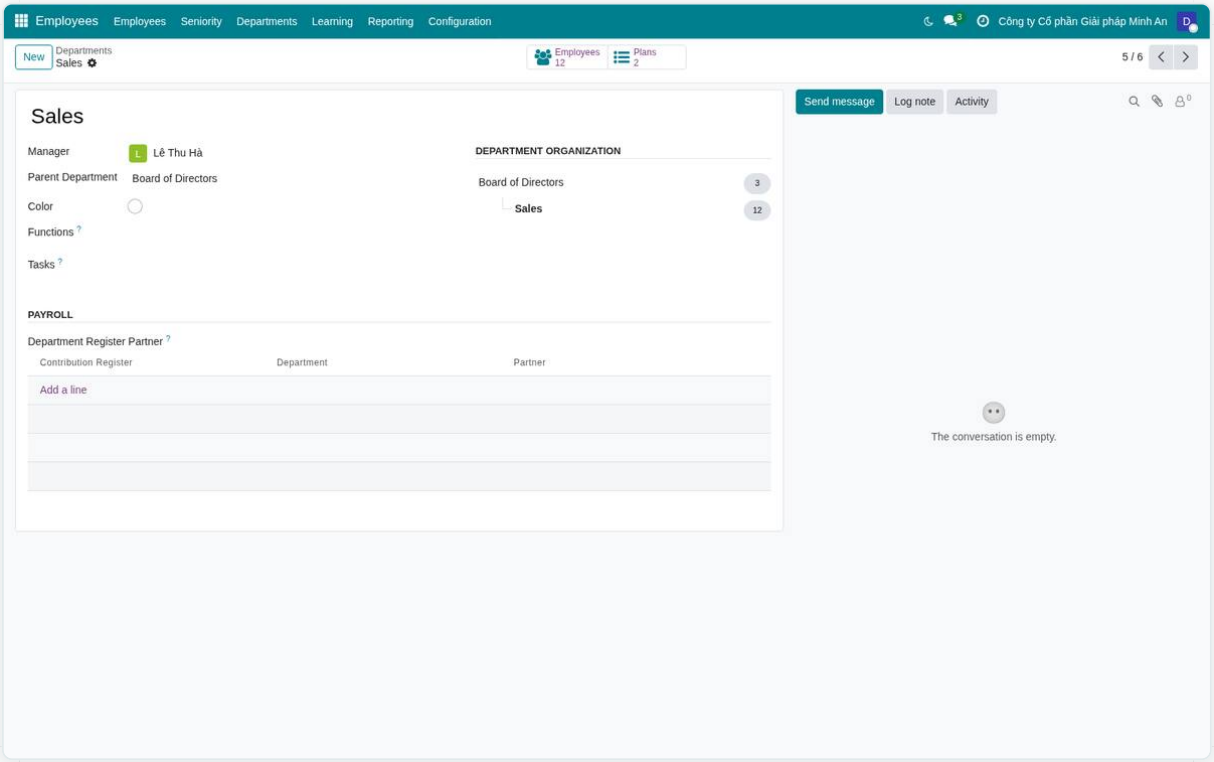
Department	Manager	Employees
Board of Directors	Trần Quốc Minh	3
Accounting - HR	Nguyễn Thị Lan	6
Warehouse and Logistics	Vũ Văn Hùng	6
Sales	Lê Thu Hà	12
Engineering	Phạm Đức Long	14
Administration	none yet	1

The "Administration" department belongs to the system administrator account; it is not one of the 5 departments of the fictional company.

Step 2 - Open a department to see its manager and parent department

Click the name **Sales** on the card.

> *Path:* `Employees > Departments` , the **Sales** card

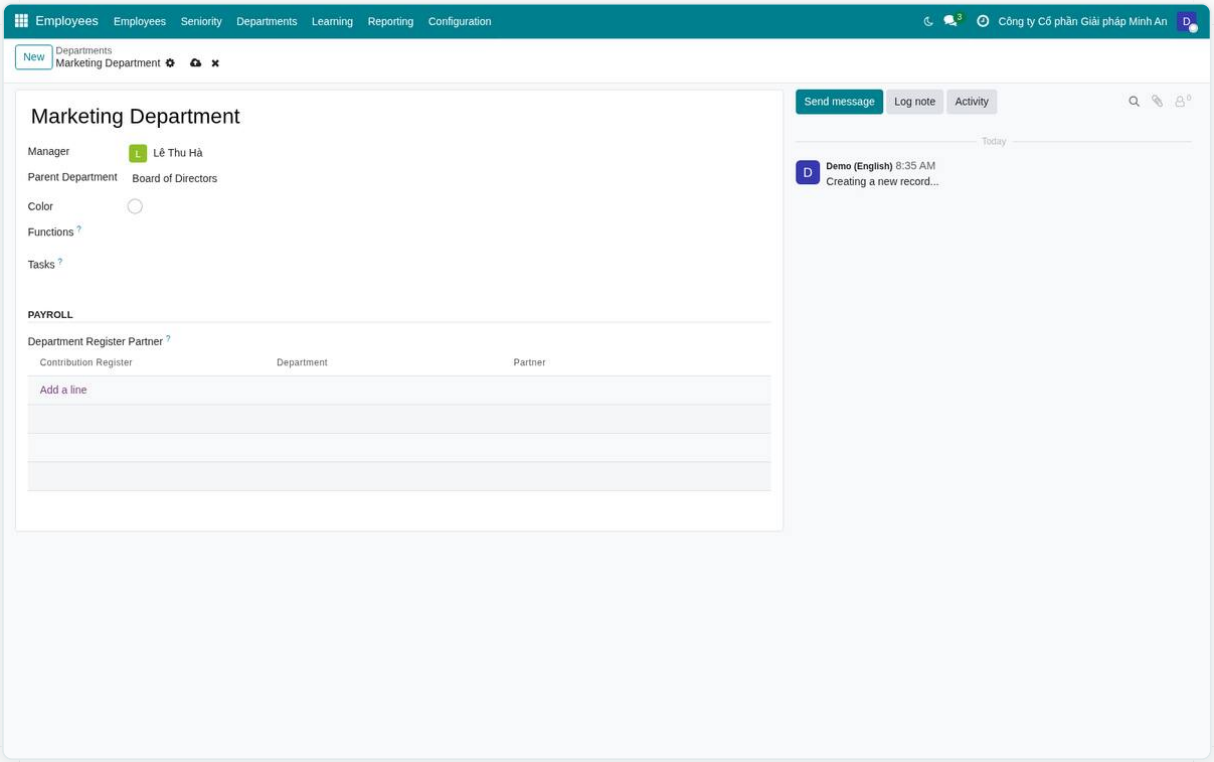


You should see: the **Manager** box shows Lê Thu Hà and the **Parent Department** box shows Board of Directors. The **Department Organization** box on the right draws two levels: Board of Directors (3) and Sales (12). At the top there are two statistic buttons, **Employees** and **Plans**.

Step 3 - Add a new department

Go back to the list of departments and click **New**. Type the name `Marketing Department`, choose "Lê Thu Hà" in **Manager** and "Board of Directors" in **Parent Department**.

> *Path:* `Employees > Departments` , the **New** button at the top left

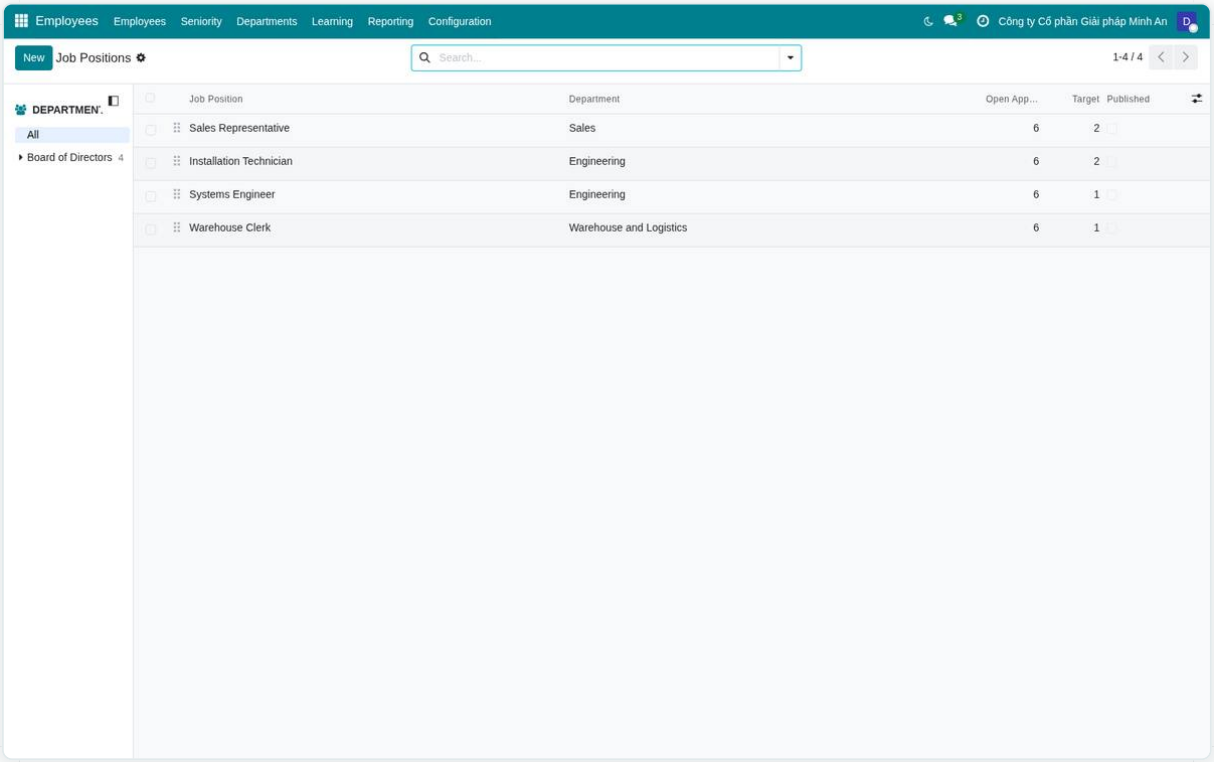


You should see: the form title is "Marketing Department"; next to the record name at the top of the page there is a cloud icon (**Save manually**) and an x icon (discard changes). The screenshot was taken before saving. Click the cloud to keep the new department, or click the x to discard it; the demo system is reloaded every night, so whether you keep it or discard it, the system is back to its original state the next day.

Step 4 - Read the list of job positions

Open the **Configuration** menu, go to the **Recruitment** group and click **Job Positions**.

> *Path:* `Employees > Configuration > Recruitment > Job Positions`



You should see: 4 positions, each linked to a department and with a **Target** column showing the number of people to hire.

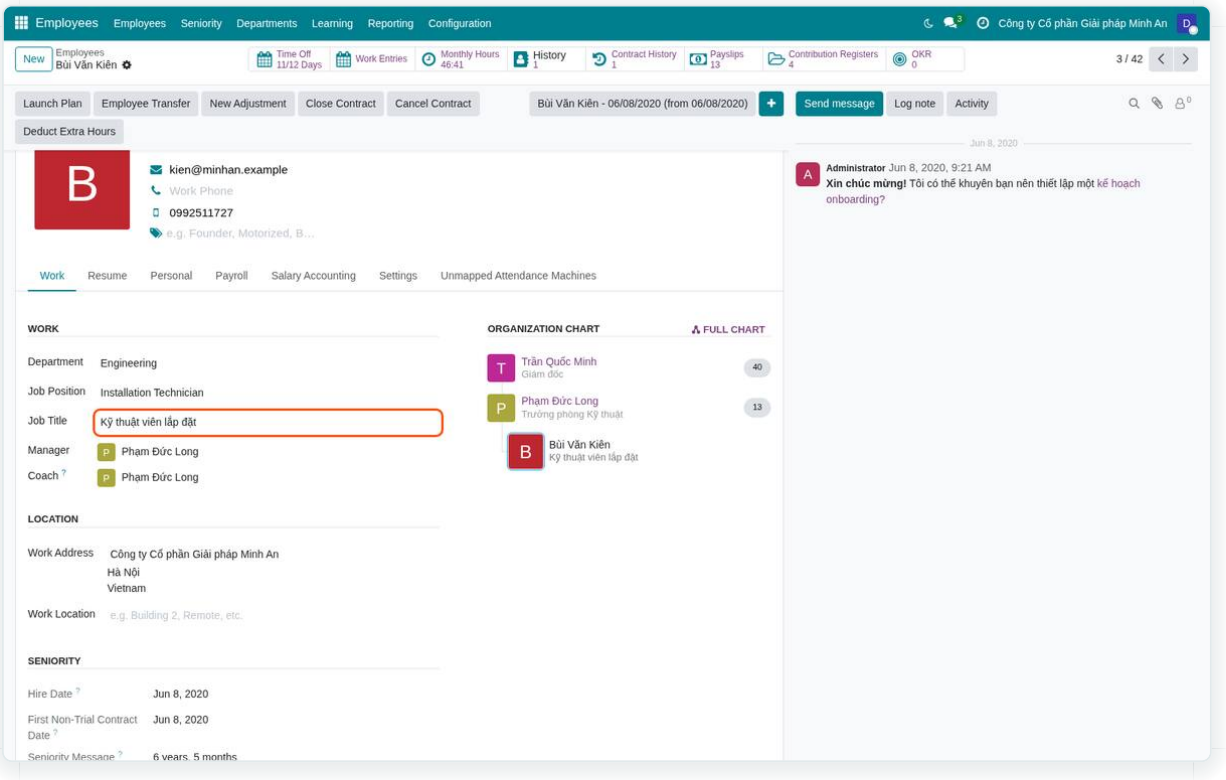
Job Position	Department	Target
Sales Representative	Sales	2
Installation Technician	Engineering	2
Systems Engineer	Engineering	1
Warehouse Clerk	Warehouse and Logistics	1

These four positions are used by the Recruitment app (see the Recruitment part).

Step 5 - See the job title on an employee record

Click **Employees** in the menu bar, open the record "Bùi Văn Kiên" and, on the **Work** tab, read the **Job Title** box.

> *Path:* `Employees > Employees` , record **Bùi Văn Kiên**



You should see: Department is Engineering, **Job Position** is Installation Technician, **Job Title** is "Kỹ thuật viên lắp đặt" (shown as typed on the record) and **Manager** is Phạm Đức Long. **Job Title** is text typed on each record (for example the titles shown in the organization chart), while **Job Position** is chosen from the catalog of 4 positions in step 4.

Try this: add "Marketing Department" in step 3 and discard it with the x, then open the record of a Sales employee and read how that person's department, manager and job title match the department card in step 2.

09 CREATE AN EMPLOYEE WITH A CONTRACT

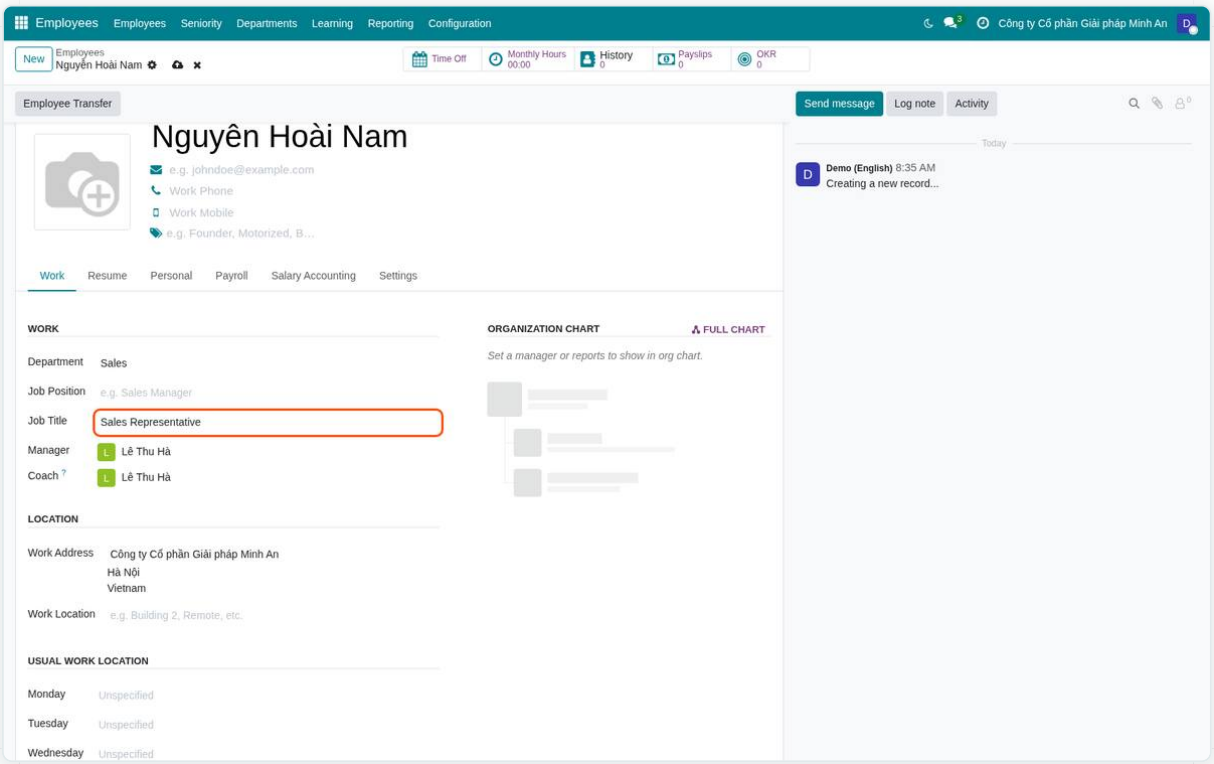
About 10 minutes. By the end of this lesson your company can fill in a new employee record with department, job title, manager, basic wage and contract type, knows which button saves or discards the record, and can read the contract of an existing employee.

The lesson uses a fictional employee, "Nguyễn Hoài Nam", who does not exist. The salary figures are sample figures for this lesson. The screenshots of steps 1 to 3 were taken before saving.

Step 1 - Open a new record and fill in the work information

On the employee list screen click **New**. Type the name `Nguyễn Hoài Nam`; on the **Work** tab choose **Department** "Sales", type the **Job Title** `Sales Representative` and choose **Manager** "Lê Thu Hà".

> *Path:* `Employees > Employees` , switch to the list view, the **New** button

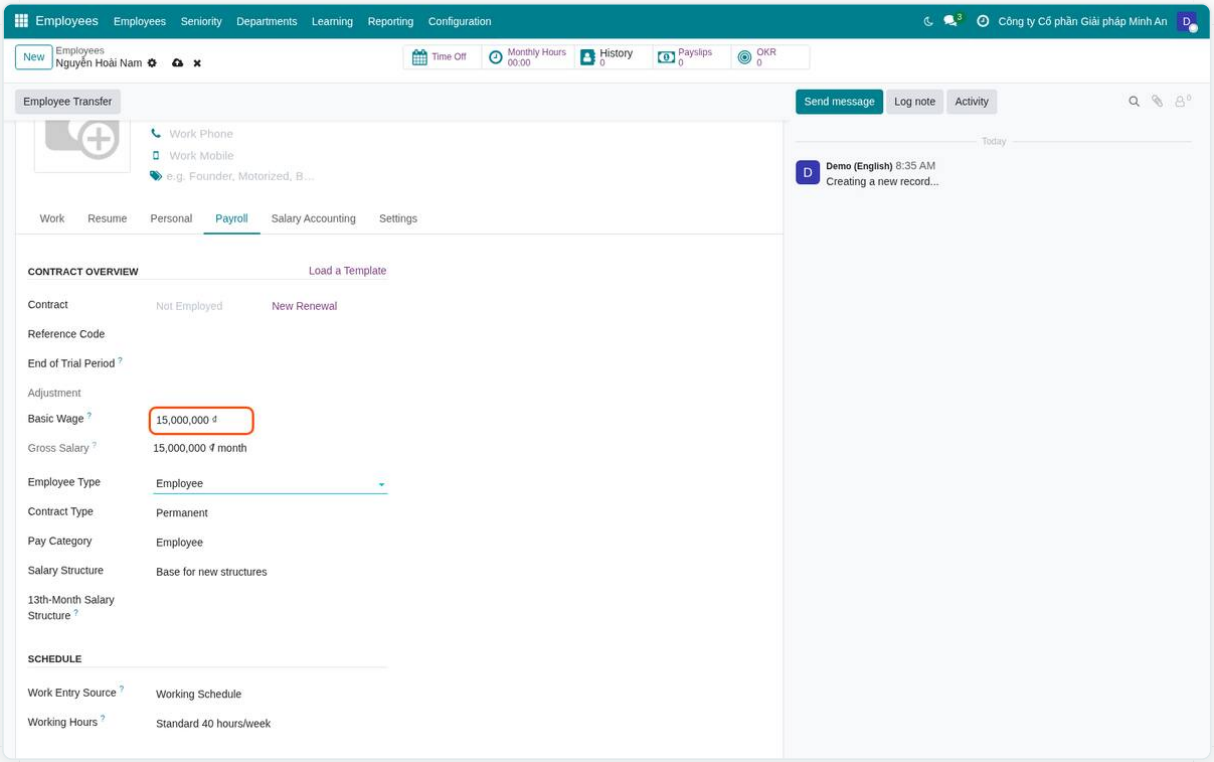


You should see: Department is Sales, **Job Title** is Sales Representative, **Manager** is Lê Thu Hà and the **Coach** box is also filled in automatically with Lê Thu Hà. Next to the record name at the top of the page there is a cloud icon and an x icon because the record is not saved.

Step 2 - Fill in the contract on the Payroll tab

Click the **Payroll** tab. In **Basic Wage** type `15000000` and in **Contract Type** choose "Permanent".

> *Path:* `Employees > Employees` , the record being created, the **Payroll** tab

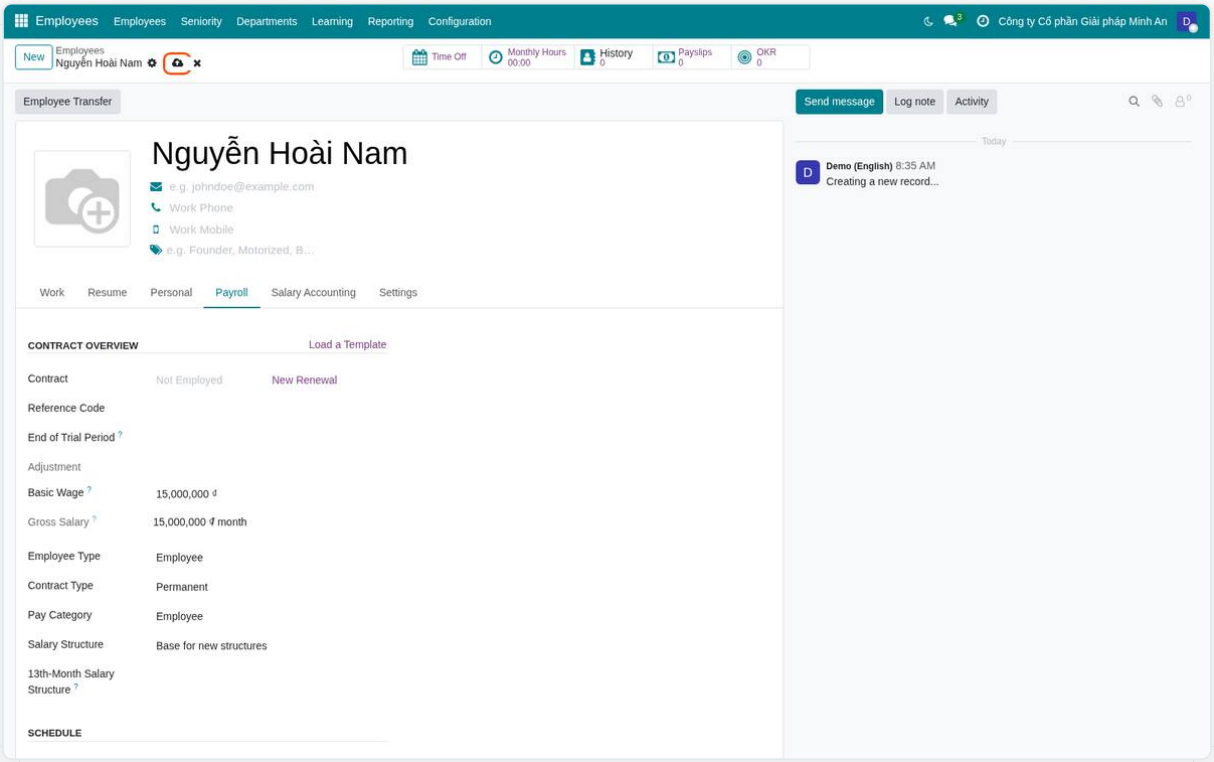


You should see: the **Basic Wage** box shows 15,000,000, the **Gross Salary** line shows 15,000,000 per month and **Contract Type** is Permanent. **Salary Structure** is filled in automatically with "Base for new structures".

Step 3 - Save or discard the record

Click the cloud icon (**Save manually**) at the top of the page to keep the record; to discard it, click the x right next to it.

> *Path:* `Employees > Employees` , the record being created, the cloud icon next to the record name

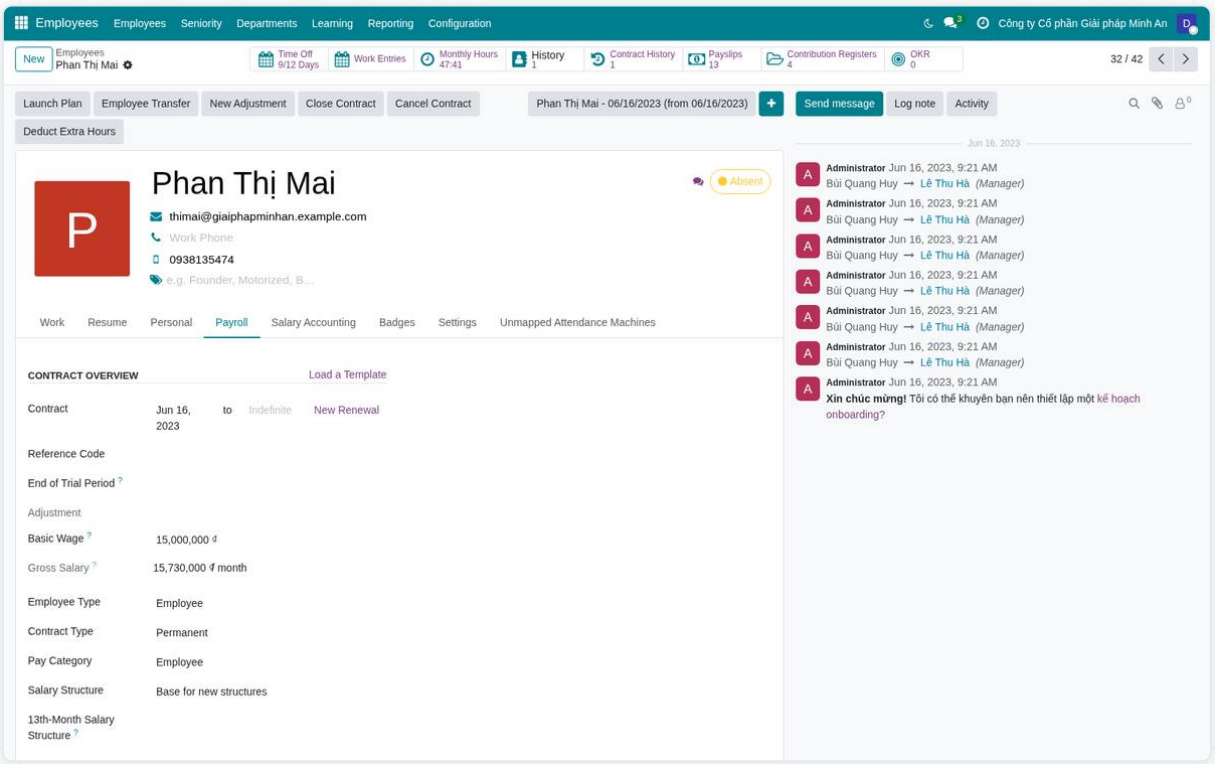


You should see: the cloud icon is circled in orange and the x sits right next to it. The screenshot was taken before clicking: the record name is still shown beside these two icons. When you click the cloud, both icons disappear and the record is written.

Step 4 - Read the contract of an existing employee

Click **Employees** in the menu bar, open the record "Phan Thị Mai" and click the **Payroll** tab.

> *Path:* `Employees > Employees` , record **Phan Thị Mai**, **Payroll** tab



You should see: the bar at the top shows the contract "Phan Thị Mai - 06/16/2023 (from 06/16/2023)". The **Payroll** tab shows **Basic Wage** 15,000,000, **Gross Salary** 15,730,000 per month and **Contract Type** Permanent. This is the contract that payroll uses to calculate payslips (see the Payroll part).

Try this: create the record "Nguyễn Hoài Nam" up to the contract step, then compare it with the contract of Phan Thị Mai in step 4 to see in which boxes the two records differ.

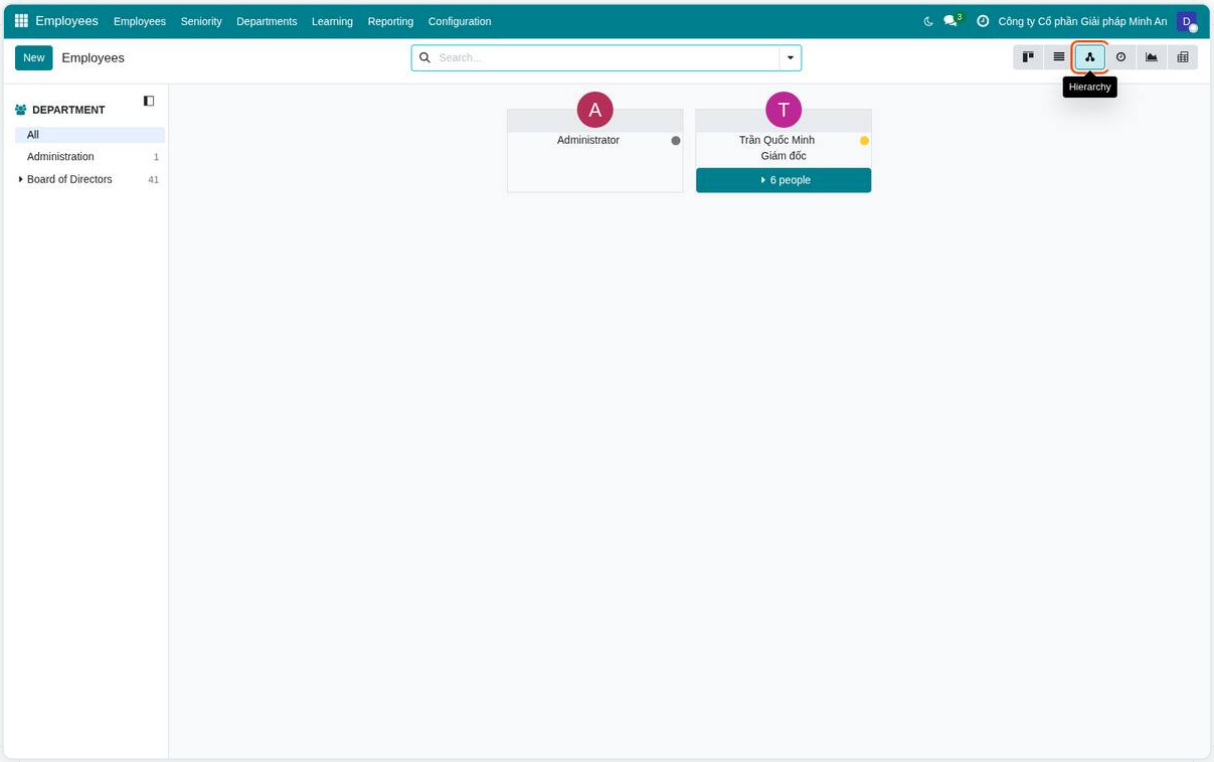
10 VIEW THE ORGANIZATION CHART

About 5 minutes. By the end of this lesson your company can open the organization chart of the company, expand it level by level and read how many people report to each department head.

Step 1 - Open the organization chart

On the employee list screen click the **Hierarchy** icon at the top right.

> *Path:* `Employees > Employees` , the **Hierarchy** icon (three connected nodes)

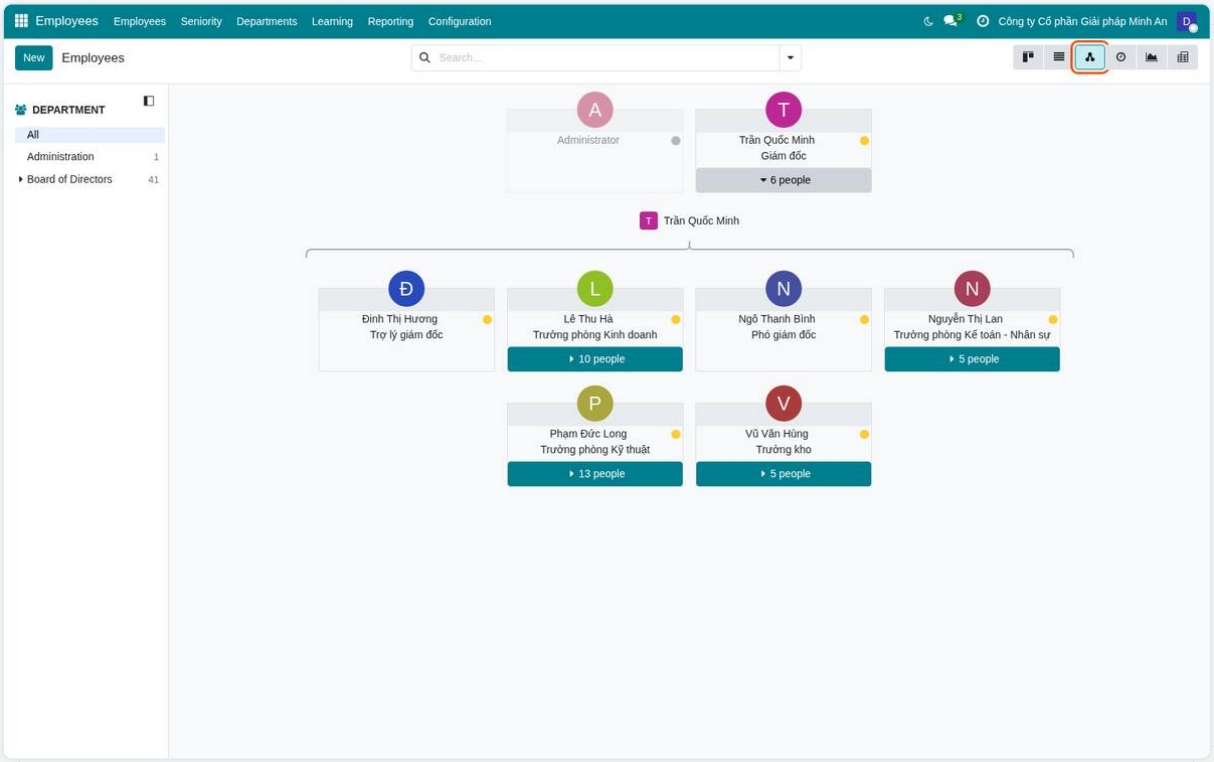


You should see: two cards at the top level: "Administrator" and "Trần Quốc Minh" with the job title "Giám đốc" (Director). The director's card has a **6 people** button.

Step 2 - Expand the level below the director

Click the **6 people** button under the card of Trần Quốc Minh.

> *Path:* `Employees > Employees` , organization chart, the **6 people** button



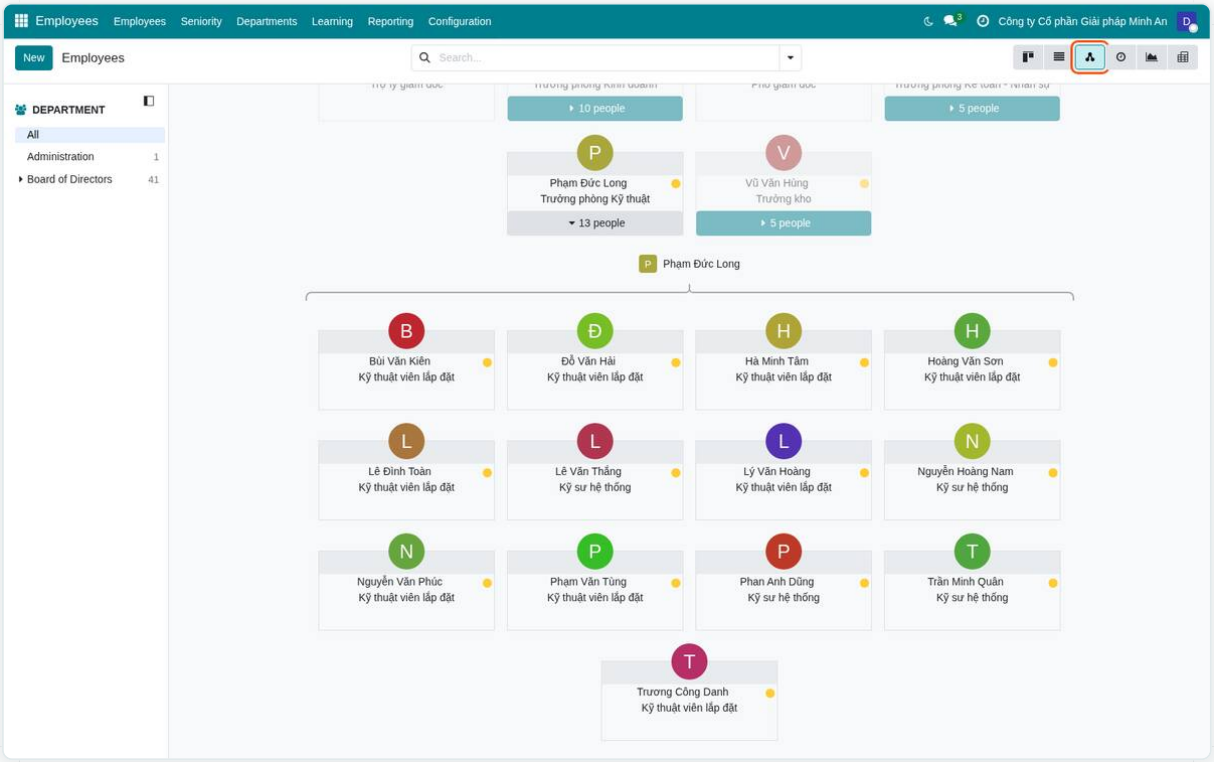
You should see: 6 cards connected below Trần Quốc Minh: Đinh Thị Hương ("Trợ lý giám đốc", Director's Assistant), Lê Thu Hà ("Trưởng phòng Kinh doanh", Head of Sales), Ngô Thanh Bình ("Phó giám đốc", Deputy Director), Nguyễn Thị Lan ("Trưởng phòng Kế toán - Nhân sự", Head of Accounting - HR), Phạm Đức Long ("Trưởng phòng Kỹ thuật", Head of Engineering), Vũ Văn Hùng ("Trưởng kho", Warehouse Manager). Each department head has a button showing the number of direct and indirect reports:

Department head	People reporting
Lê Thu Hà	10
Nguyễn Thị Lan	5
Phạm Đức Long	13
Vũ Văn Hùng	5

Step 3 - Expand the Engineering department

Click the **13 people** button under the card of Phạm Đức Long.

> *Path:* `Employees > Employees` , organization chart, the **13 people** button



You should see: the line "Phạm Đức Long" in the middle of the page and, below it, the Engineering employee cards arranged in a grid, each with a name and a job title ("Kỹ thuật viên lắp đặt" or "Kỹ sư hệ thống").

Try this: click **Hierarchy**, expand the director, then expand the Sales department (the **10 people** button) and count whether there are exactly 10 cards.

PART IV. TIME OFF

This part answers the question: **how many days off does each person get, how many approval steps does a leave request go through, and where can managers see the leave calendar and the remaining days?** HR staff follow the lesson on setup and the lesson on requesting leave. Department heads and the director read the lesson on the leave calendar and reports. The data is sample data of the fictional company "Công ty Cổ phần Giải pháp Minh An".

The part has three lessons: one on setting up time off types and allocating leave, one on creating a leave request and reaching the approval step, one on viewing the leave calendar and the report of days off. The `demo` account has the right to manage Time Off but is not linked to any employee and is not anyone's manager, so some default lists filtered by "My Team" are empty; the steps below always state which filter label to remove. All screenshots in this part were taken on 09/11/2026. The screenshots of the new request and the new allocation were taken with the form filled in but not saved; the approval screenshots were taken on existing requests. The English screenshots show the same records as the Vietnamese ones, so a few typed values (descriptions, the duration text next to the dates, log notes) appear as they were typed, and the dates on screen use the month/day/year format.

11 SET UP TIME OFF TYPES AND ALLOCATE LEAVE

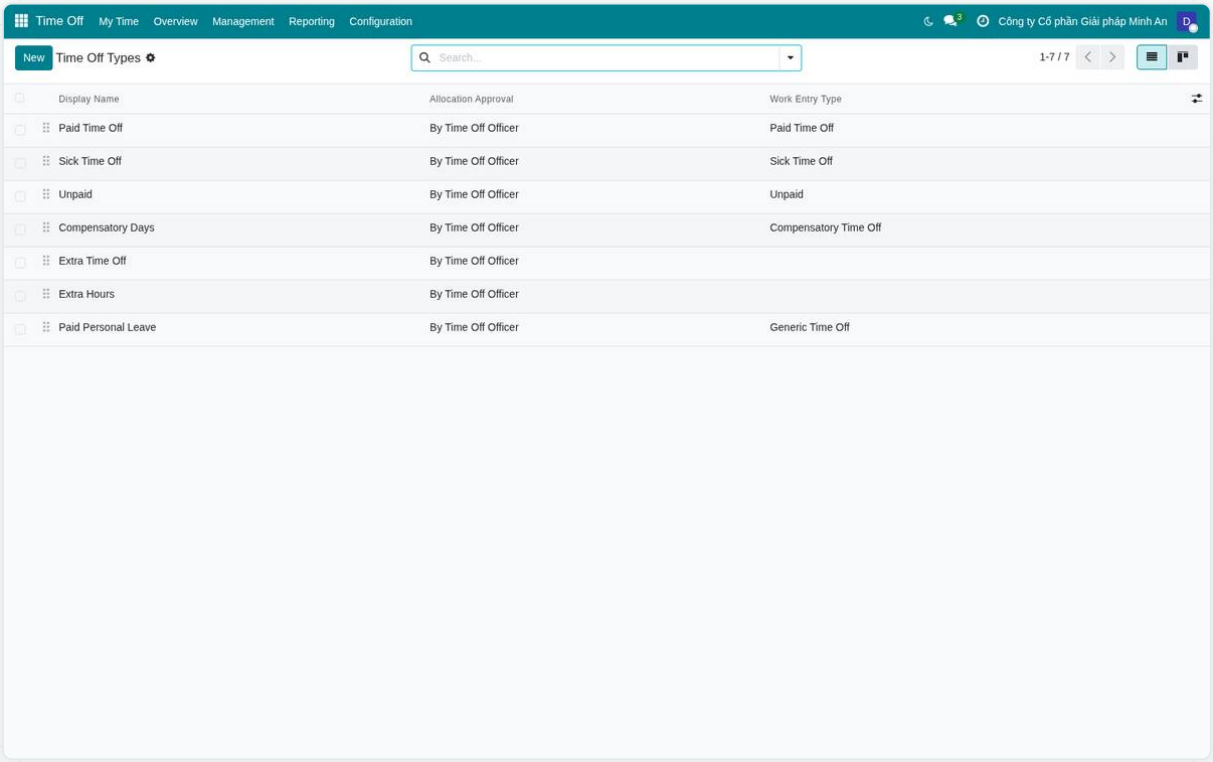
About 10 minutes. By the end of this lesson your company can read the 7 time off types, knows how many approval levels the "Paid Time Off" type has and whether it requires an allocation, can read the 82 leave allocation lines, and has seen the form for adding a new allocation.

Log in with the account `demo` / `demo` as in the section "How to use this handbook".

Step 1 - Open the list of time off types

Open the **Configuration** menu and click **Time Off Types**.

> *Path:* `Time Off > Configuration > Time Off Types`



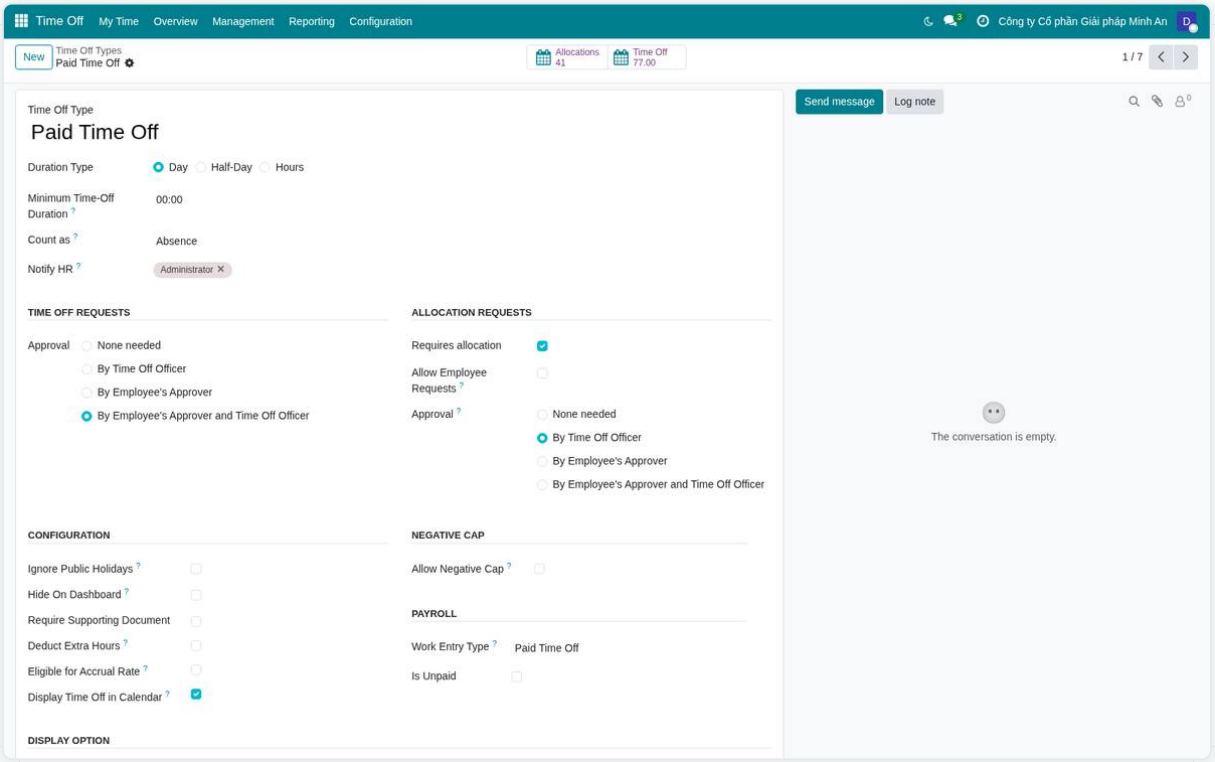
You should see: 7 time off types: Paid Time Off, Sick Time Off, Unpaid, Compensatory Days, Extra Time Off, Extra Hours, Paid Personal Leave. The **Allocation Approval** column of all 7 types reads "By Time Off Officer"; the **Work Entry Type** column shows which type of work entry the leave counts as in payroll.

The fictional company uses 4 types: Paid Time Off, Sick Time Off, Unpaid and Paid Personal Leave (a type added just for the company). The other three are built in and not used.

Step 2 - Open "Paid Time Off" to read the approval rules

Click the row **Paid Time Off**.

> *Path:* `Time Off > Configuration > Time Off Types` , row **Paid Time Off**

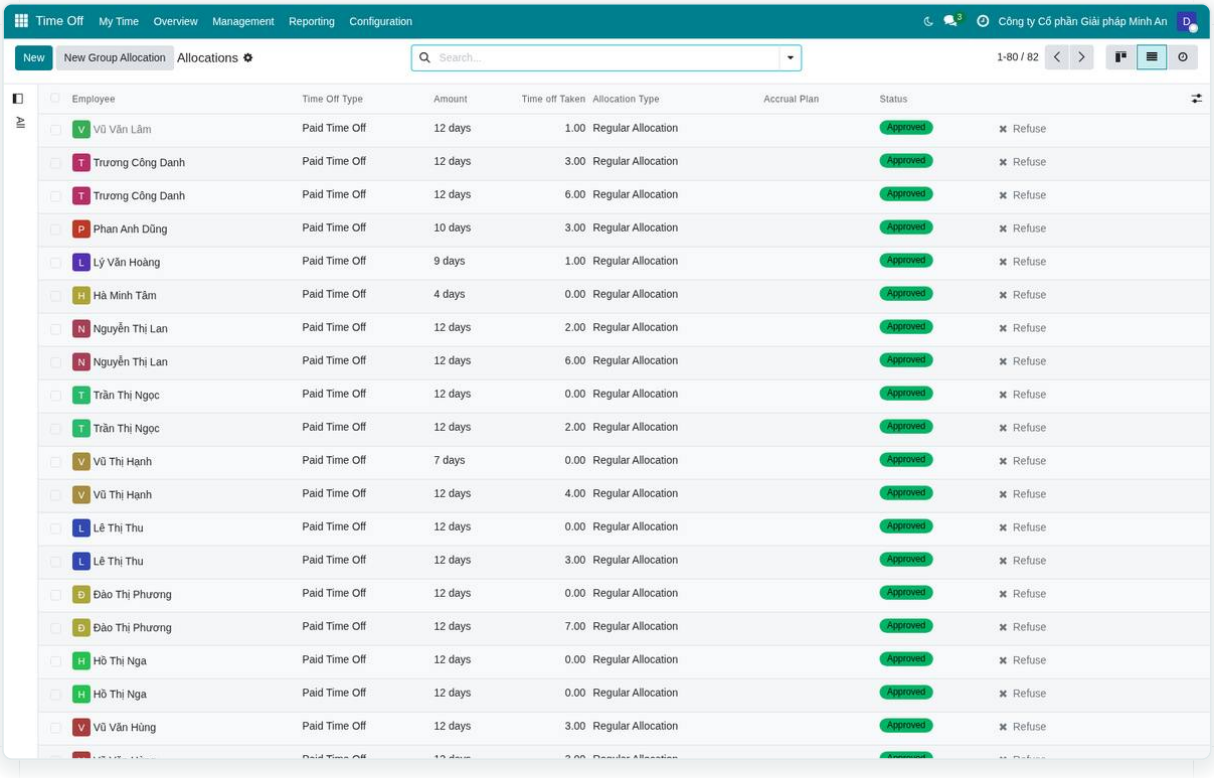


You should see: in the **Time Off Requests** block, the **Approval** box is set to "By Employee's Approver and Time Off Officer", which means a request goes through two approval levels. In the **Allocation Requests** block, **Requires allocation** is ticked and **Approval** is set to "By Time Off Officer". At the top of the page there are two statistic buttons, **Allocations** and **Time Off**. To change how requests are approved, just choose another one of the four options in the **Approval** box, with no programming. You do not need to click Save, just read.

Step 3 - Read the list of allocations

Open the **Management** menu and click **Allocations**. In the search box click the x on the two filter labels **First Approval** and **My Team**, then click the **List** icon at the top right.

> *Path:* `Time Off > Management > Allocations`

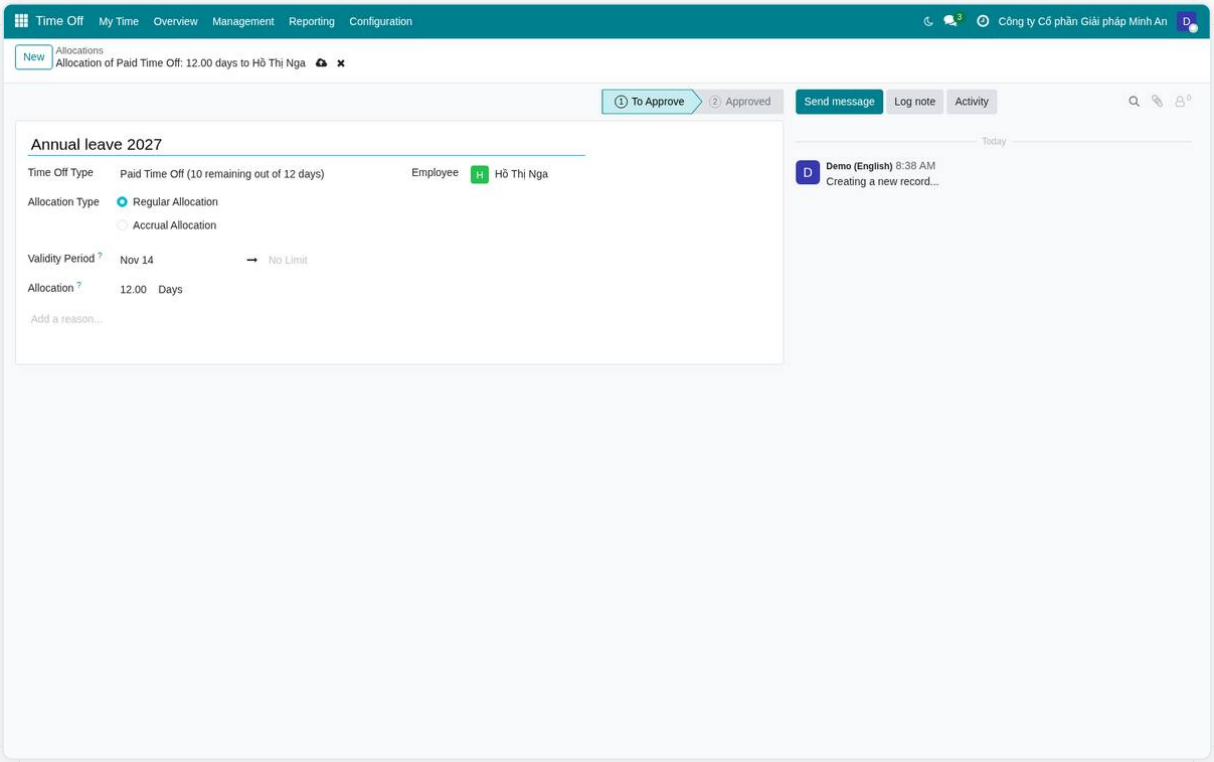


You should see: the page counter reads "1-80 / 82", so there are 82 allocation lines. Most are Paid Time Off for 12 days, **Allocation Type** is "Regular Allocation" and **Status** is "Approved". People who joined during the year are allocated according to the months left, for example Hà Minh Tâm has 4 days.

Step 4 - Add a new allocation

Click **New**. In **Employee** choose "Hồ Thị Nga", in **Time Off Type** choose "Paid Time Off", in **Allocation** type `12`, and type the allocation name `Annual leave 2027`.

> *Path:* `Time Off > Management > Allocations`, the **New** button



You should see: the breadcrumb reads "Allocations" and the record name is "Allocation of Paid Time Off: 12.00 days to Hồ Thị Nga"; the status bar is at **To Approve** (the second step is **Approved**), **Allocation Type** is "Regular Allocation" and **Allocation** is 12.00 days. The **Time Off Type** box also shows the employee's remaining days. The screenshot was taken before saving; click the cloud icon to save, or the x to discard.

Try this: open the time off type "Paid Personal Leave" and compare its **Approval** box with "Paid Time Off" in step 2 to see that the two types are approved differently: this type needs only one approval level, while "Paid Time Off" needs two.

12 CREATE A LEAVE REQUEST AND REACH THE APPROVAL STEP

About 10 minutes. By the end of this lesson your company can fill in a Paid Time Off request for an employee, read the list of requests waiting for approval, open a pending request to see the **Approve** button and the two-level status bar, and open an approved request to see the final status.

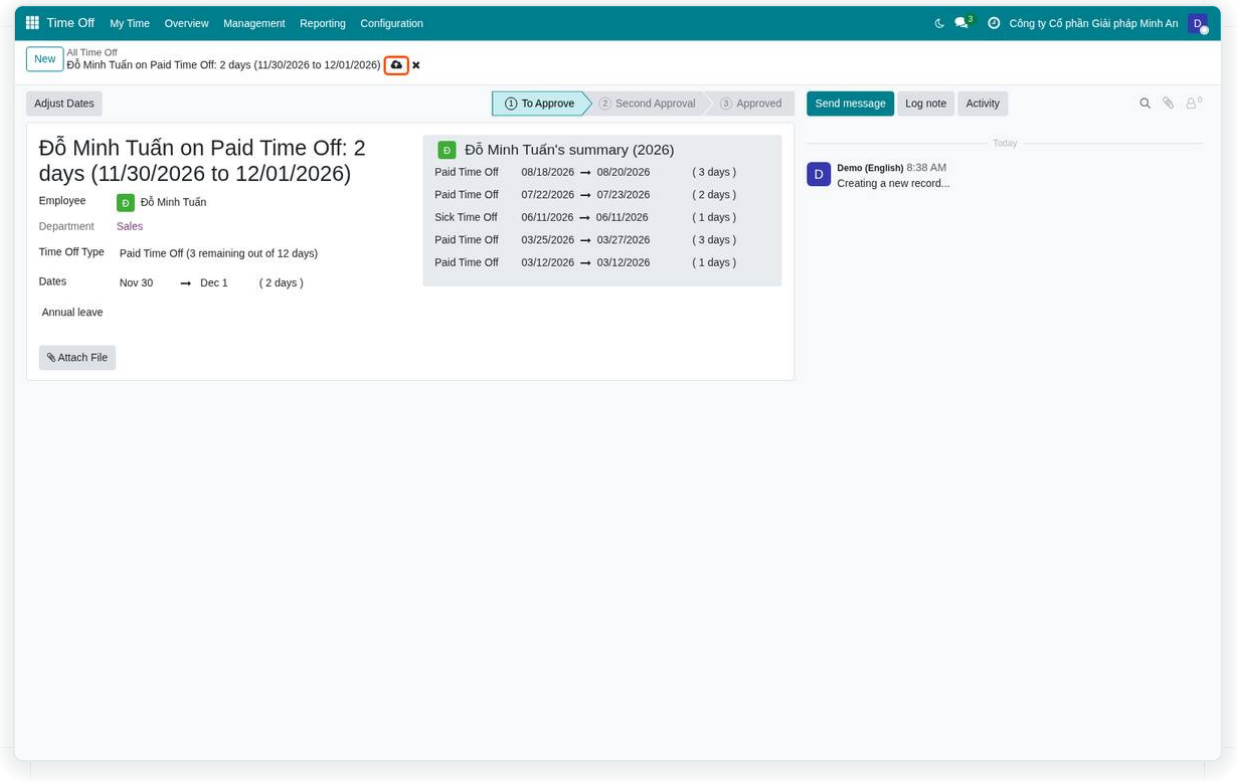
The lesson uses the fictional employee "Đỗ Minh Tuấn" for the new request (captured before saving) and the existing requests in the sample data. So that the existing data is not changed, the approval screenshots were taken before clicking **Approve**.

Step 1 - Create a new leave request

Open the **Management** menu and click **Time Off**. Click the x on the filter label **Waiting For Me**, then click **New**. In **Employee** choose "Đỗ Minh Tuấn", in **Time Off Type** choose "Paid Time Off". In

the **Dates** box choose from 11/30/2026 to 12/01/2026 (month/day/year, as the English screen shows). Type the description `Annual leave`.

> *Path:* `Time Off > Management > Time Off` , the **New** button

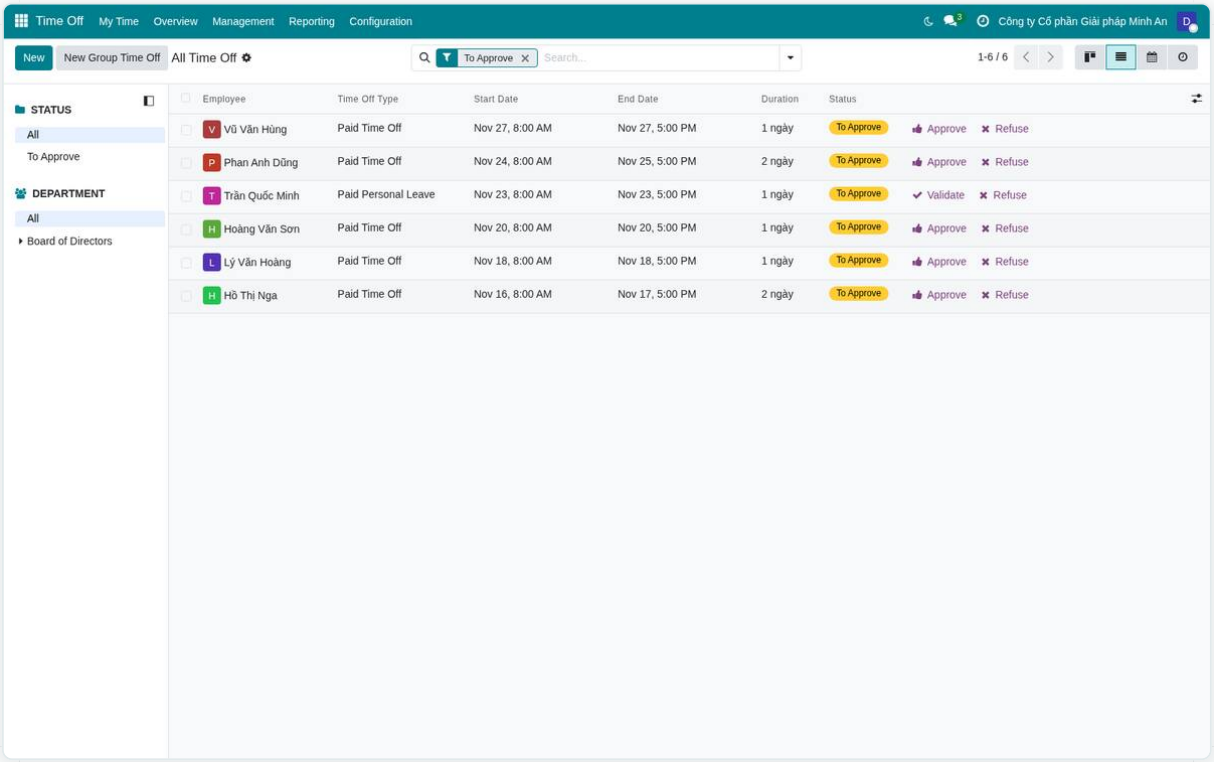


You should see: Department is filled in automatically with Sales. **Time Off Type** shows "Paid Time Off (3 remaining out of 12 days)". The **Dates** box shows a duration of 2 days. The status bar is at **To Approve**. The box on the right is the person's 2026 summary, listing earlier requests. The cloud icon (**Save manually**) is circled: click it and the request is written, click the x next to it and the request is discarded. The screenshot was taken before saving.

Step 2 - View the list of requests waiting for approval

On the time off list screen, click the x on the filter label **Waiting For Me**, open the filter box at the end of the search bar and choose **To Approve**.

> *Path:* `Time Off > Management > Time Off`

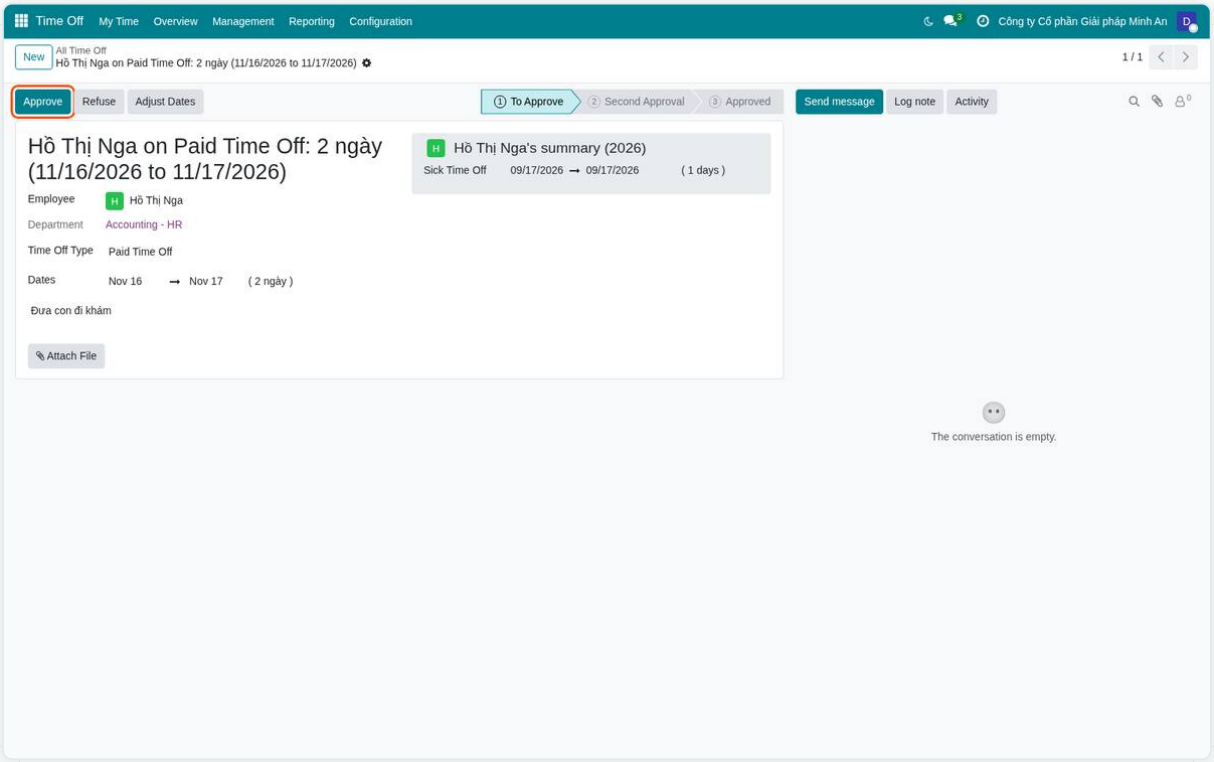


You should see: the counter reads "1-6 / 6", so 6 requests are waiting, all with leave dates from 16 November 2026 to 27 November 2026. Each row has two buttons, **Approve** and **Refuse**; only the "Paid Personal Leave" request of Trần Quốc Minh shows a **Validate** button because that type needs just one approval level. The **Status** of all 6 rows is "To Approve".

Step 3 - Open a pending request

Click the row of **Hồ Thị Nga** (Paid Time Off, 16 to 17 November).

> *Path:* `Time Off > Management > Time Off` , row **Hồ Thị Nga**

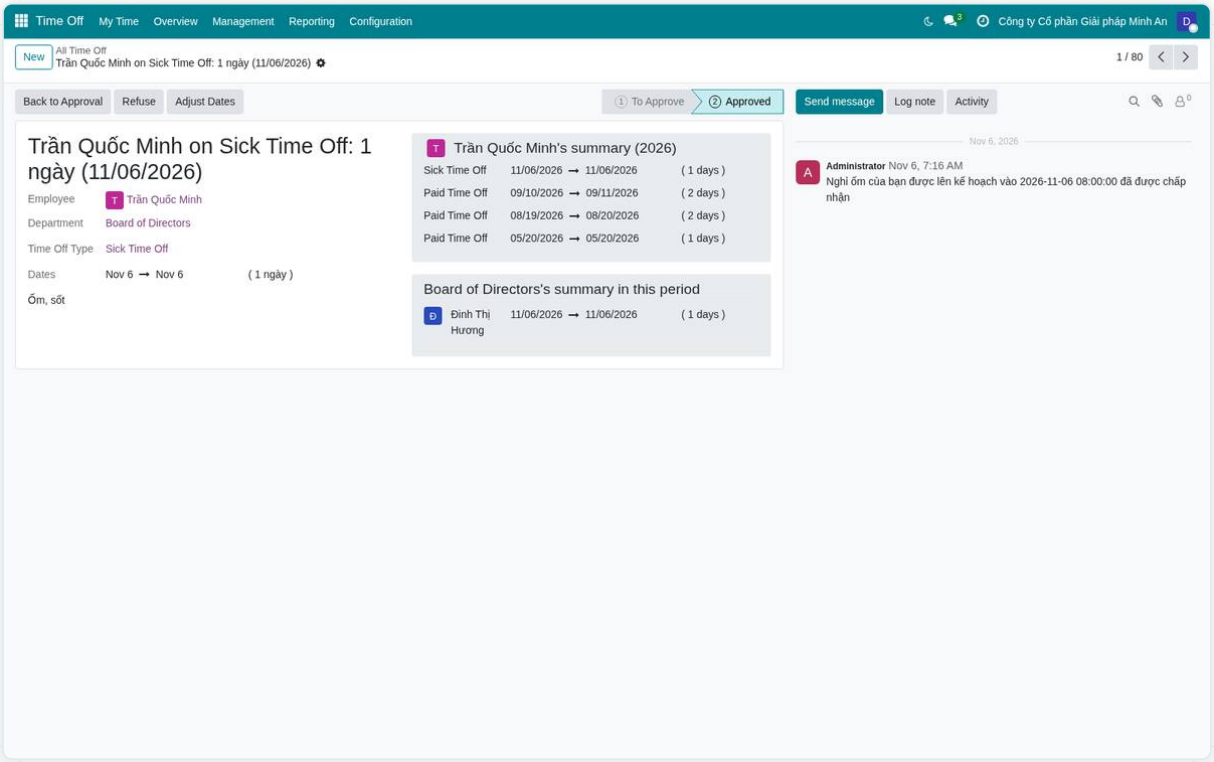


You should see: the request title names Hồ Thị Nga, Paid Time Off, 2 days, from 16 November 2026 to 17 November 2026. The button row at the top has **Approve**, **Refuse** and **Adjust Dates**; the **Approve** button is circled. The status bar has three steps: **To Approve**, **Second Approval**, **Approved**, and the request is at the first one. Because the "Paid Time Off" type has two approval levels (previous lesson), the approver clicks **Approve** to move to the second level and clicks again to reach **Approved**. The screenshot was taken before clicking.

Step 4 - Open an approved request

Go back to the list of requests, remove the filter label **To Approve**, choose the **Approved** filter and click the first row of the list.

> *Path:* `Time Off > Management > Time Off` , the **Approved** filter



You should see: the first request in the screenshot is Trần Quốc Minh on Sick Time Off, 1 day, 6 November 2026. The status bar is at **Approved**, and the buttons at the top are **Back to Approval**, **Refuse** and **Adjust Dates**. The log on the right records that the sick leave planned for 2026-11-06 was accepted. The box beside the form lists more days off of that person and of the department in the same period.

Try this: create the request in step 1 for another employee, change the time off type to "Sick Time Off" and see whether the **Time Off Type** box still shows the remaining days, then discard the request with the x.

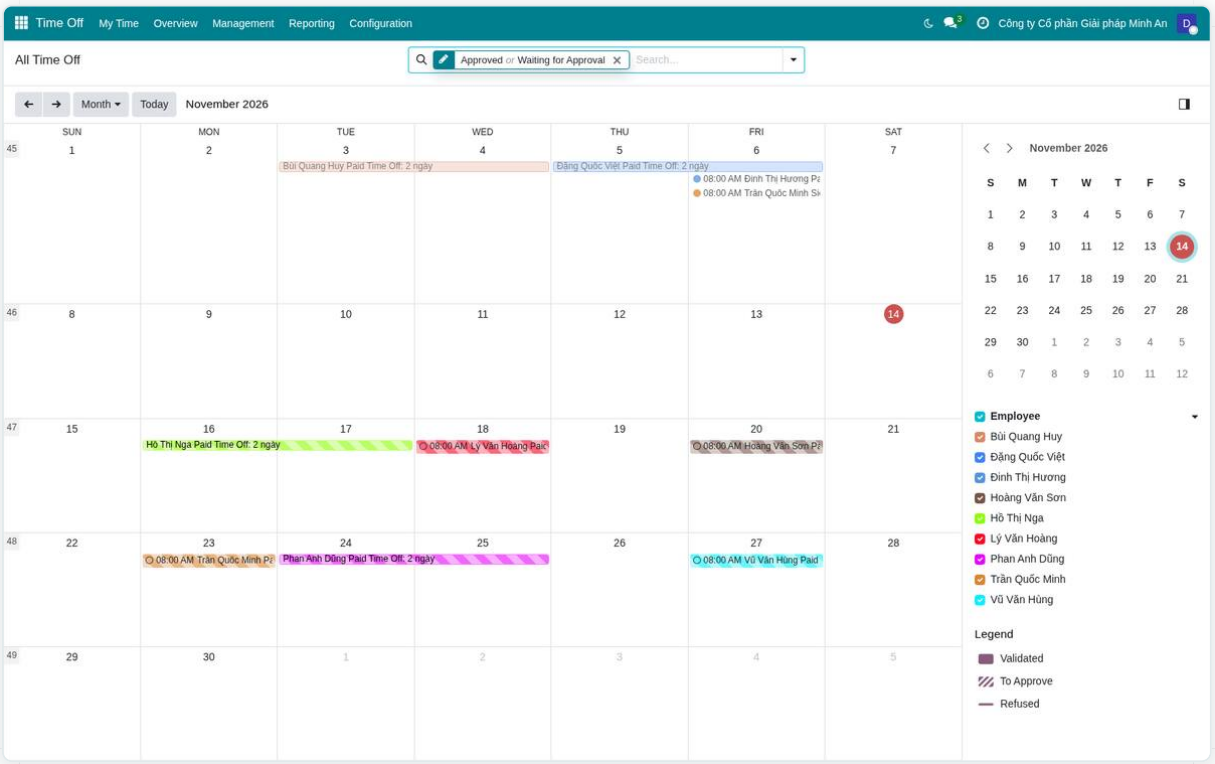
13 VIEW THE LEAVE CALENDAR AND THE DAYS-OFF REPORT

About 10 minutes. By the end of this lesson your company can read the November 2026 leave calendar with the pending requests, see the days off by type, and read the remaining leave days of the whole company.

Step 1 - Open the company leave calendar

Click **Overview** in the menu bar. Click the x on the filter label **My Team**.

> *Path:* `Time Off > Overview`

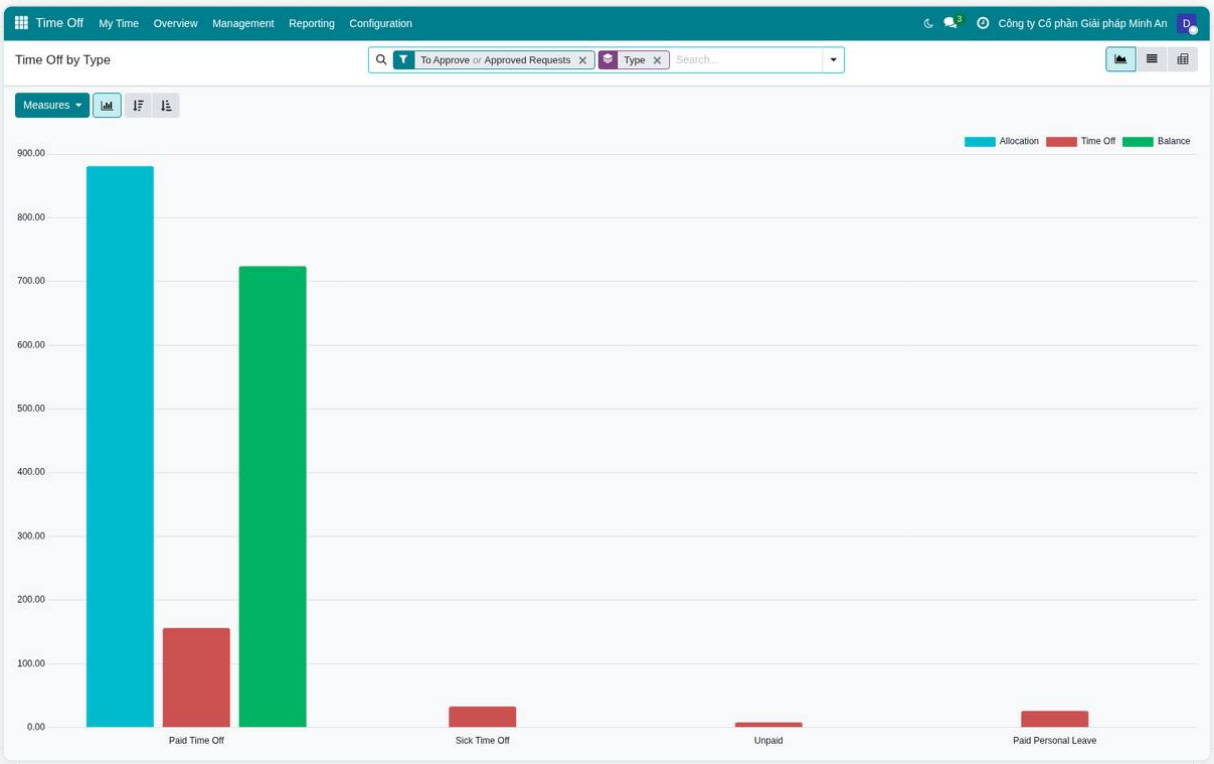


You should see: the calendar of November 2026, a month in progress. Confirmed requests are filled in solid, pending requests are striped (16 to 17 November, 18, 20, 23, 24 to 25 and 27 November). The right-hand column lists each employee with a color, and the **Legend** has three entries: **Validated**, **To Approve**, **Refused**. The remaining filter label reads "Approved or Waiting for Approval".

Step 2 - View days off by type

Open the **Reporting** menu and click **by Type**.

> *Path:* `Time Off > Reporting > by Type`

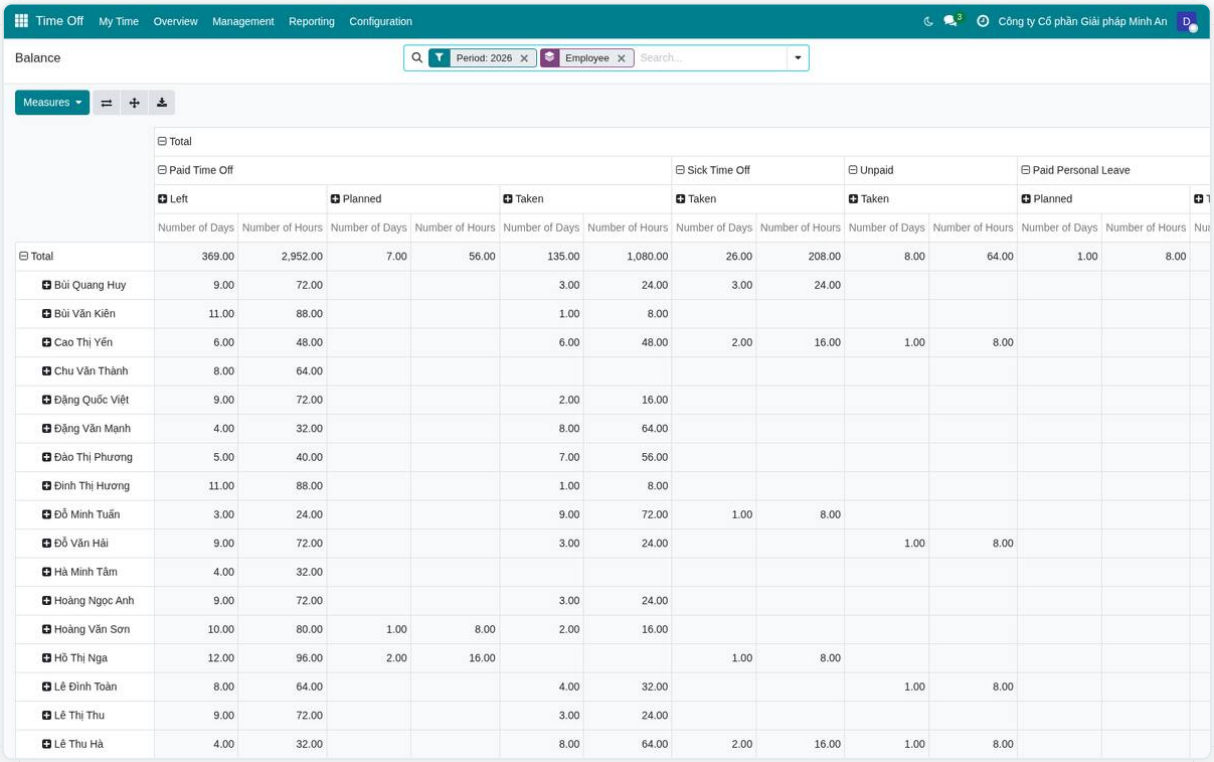


You should see: a bar chart with four groups: Paid Time Off, Sick Time Off, Unpaid, Paid Personal Leave; each group has three bars, **Allocation**, **Time Off** and **Balance**. The Paid Time Off bars are the tallest; the other three types only have a low **Time Off** bar. You can switch to a list or a Pivot table with the icons at the top right.

Step 3 - Read each person's leave balance

Open the **Reporting** menu and click **Balance**.

> *Path:* `Time Off > Reporting > Balance`



	Total											
	Paid Time Off						Sick Time Off		Unpaid		Paid Personal Leave	
	Left		Planned		Taken		Taken		Taken		Planned	
	Number of Days	Number of Hours	Number of Days	Number of Hours	Number of Days	Number of Hours	Number of Days	Number of Hours	Number of Days	Number of Hours	Number of Days	Number of Hours
Total	369.00	2,952.00	7.00	56.00	135.00	1,080.00	26.00	208.00	8.00	64.00	1.00	8.00
Bùi Quang Huy	9.00	72.00			3.00	24.00	3.00	24.00				
Bùi Văn Kiên	11.00	88.00			1.00	8.00						
Cao Thị Yến	6.00	48.00			6.00	48.00	2.00	16.00	1.00	8.00		
Chu Văn Thành	8.00	64.00										
Đặng Quốc Việt	9.00	72.00			2.00	16.00						
Đặng Văn Mạnh	4.00	32.00			8.00	64.00						
Đào Thị Phương	5.00	40.00			7.00	56.00						
Đinh Thị Hương	11.00	88.00			1.00	8.00						
Đỗ Minh Tuấn	3.00	24.00			9.00	72.00	1.00	8.00				
Đỗ Văn Hải	9.00	72.00			3.00	24.00			1.00	8.00		
Hà Minh Tâm	4.00	32.00										
Hoàng Ngọc Anh	9.00	72.00			3.00	24.00						
Hoàng Văn Sơn	10.00	80.00	1.00	8.00	2.00	16.00						
Hồ Thị Nga	12.00	96.00	2.00	16.00			1.00	8.00				
Lê Đình Toàn	8.00	64.00			4.00	32.00			1.00	8.00		
Lê Thị Thu	9.00	72.00			3.00	24.00						
Lê Thu Hà	4.00	32.00			8.00	64.00	2.00	16.00	1.00	8.00		

You should see: a Pivot table for the 2026 period, each row is an employee and the columns are grouped by time off type. The **Total** row of "Paid Time Off" shows 369 days under **Left** and 135 days under **Taken**. The **Total** row of "Sick Time Off" shows 26 days, "Paid Personal Leave" taken is 19 days and "Unpaid" is 8 days. Each figure has a **Number of Hours** column next to it.

Try this: in step 3 click the name of an employee to expand that person's row, then compare the number of days under **Taken** with the summary shown on the leave request in the previous lesson.

PART V. ATTENDANCE

This part answers the question: **where is each person's check-in and check-out time recorded, who can correct it, how do late arrivals and early departures show up, and how does the time clock at the gate push its data into the system?** HR staff and payroll accountants follow the first lessons. The director reads the monthly report lesson. The data is sample data of the fictional company "Công ty Cổ phần Giải pháp Minh An": a work shift from 8:00 to 17:00, Sundays and Saturday afternoons off, and thirteen consecutive months of attendance.

The part has four lessons: one on reading the work shift, one on viewing and correcting check-in and check-out times, one on viewing attendance by month, and one on viewing the time clocks and the data they have uploaded. The `demo` account has a limited attendance role (not the attendance manager role), so the **Attendance Machines** menu and the **Configuration** menu of the app do not appear for this account; the last lesson reaches the two time clock screens with direct links, for viewing only. The **Kiosk Mode** menu does appear for this account: it opens the attendance page for a clock placed at the gate (swipe a card or pick a name manually); this part does not go through that page. All screenshots were taken on 09/11/2026; the screenshot of the time correction was taken before saving. The English screenshots show the same records as the Vietnamese ones, so a few names typed in Vietnamese (such as the name of the working schedule) appear as they are, and dates and times on screen use the English format.

14 READ THE WORK SHIFT THAT DECIDES LATE ARRIVAL AND EARLY DEPARTURE

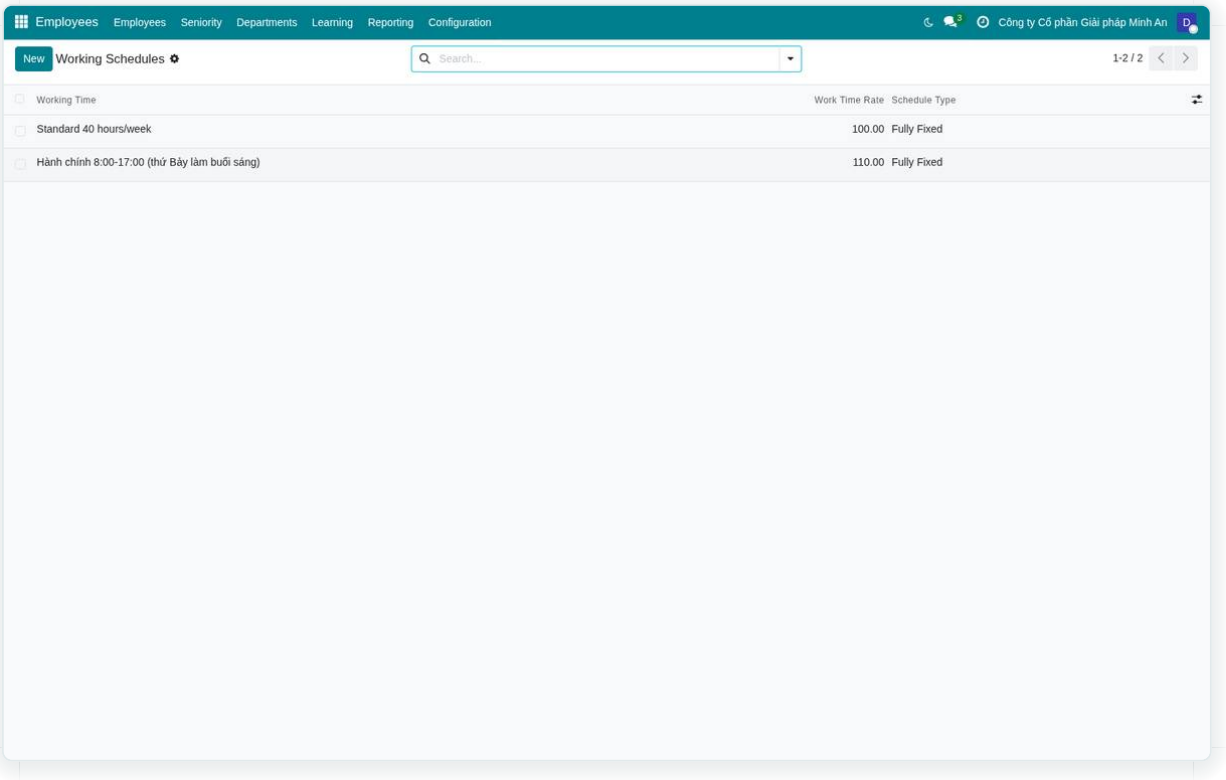
About 10 minutes. By the end of this lesson your company can open the list of working schedules, read the "Hành chính 8:00-17:00" shift (hours of each period, total hours per week) and knows in which box this schedule is attached to the employee record.

Log in with the account `demo` / `demo` as in the section "How to use this handbook".

Step 1 - Open the list of working schedules

Open the **Configuration** menu of the **Employees** app, go to the **Employee** group and click **Working Schedules**.

> *Path:* `Employees > Configuration > Employee > Working Schedules`

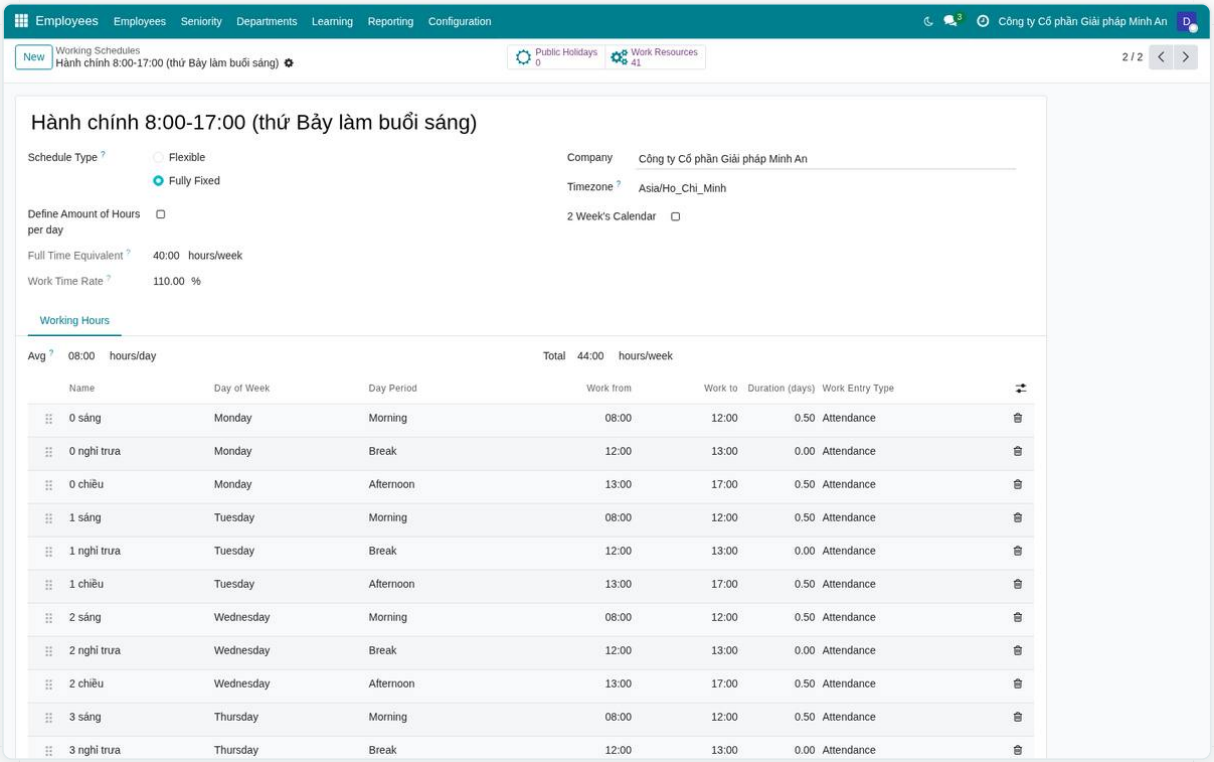


You should see: 2 schedules: "Standard 40 hours/week" (**Work Time Rate** 100.00) and "Hành chính 8:00-17:00 (thứ Bảy làm buổi sáng)" (rate 110.00). The fictional company uses the second schedule.

Step 2 - Open the "Hành chính" schedule to read the hours of each period

Click the row **Hành chính 8:00-17:00 (thứ Bảy làm buổi sáng)**.

> *Path:* `Employees > Configuration > Employee > Working Schedules` , row **Hành chính**

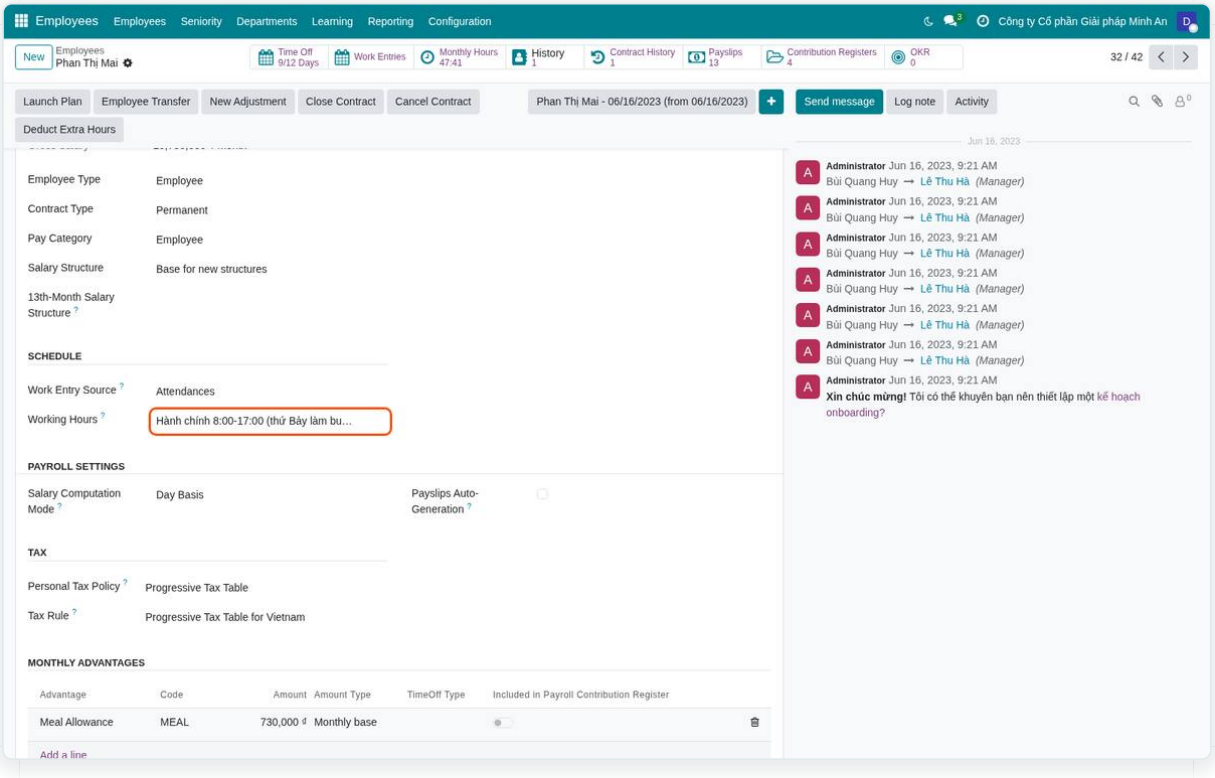


You should see: the **Working Hours** tab lists one line per weekday and period: morning 08:00 to 12:00, lunch break 12:00 to 13:00 and afternoon 13:00 to 17:00 for Monday to Friday, while Saturday has only the morning 08:00 to 12:00. The **Avg** line reads 08:00 hours per day and the **Total** line reads 44:00 hours per week. The **Work Time Rate** box reads 110.00 %. You only read; do not click Save.

Step 3 - See where the schedule is attached on the employee record

Click **Employees** in the menu bar, open the record "Phan Thị Mai", click the **Payroll** tab and scroll down to the **Schedule** group.

> *Path:* `Employees > Employees` , record **Phan Thị Mai**, **Payroll** tab



You should see: the **Schedule** group has the **Work Entry Source** box set to "Attendances" and the **Working Hours** box set to "Hành chính 8:00-17:00 (thứ Bảy làm bu..." (circled). **Work Entry Source** set to "Attendances" means payroll takes the worked days from the attendance data (see the Payroll part).

Try this: open the record of another employee in step 3 and check whether the **Working Hours** box shows the same schedule.

15 VIEW AND CORRECT CHECK-IN AND CHECK-OUT TIMES

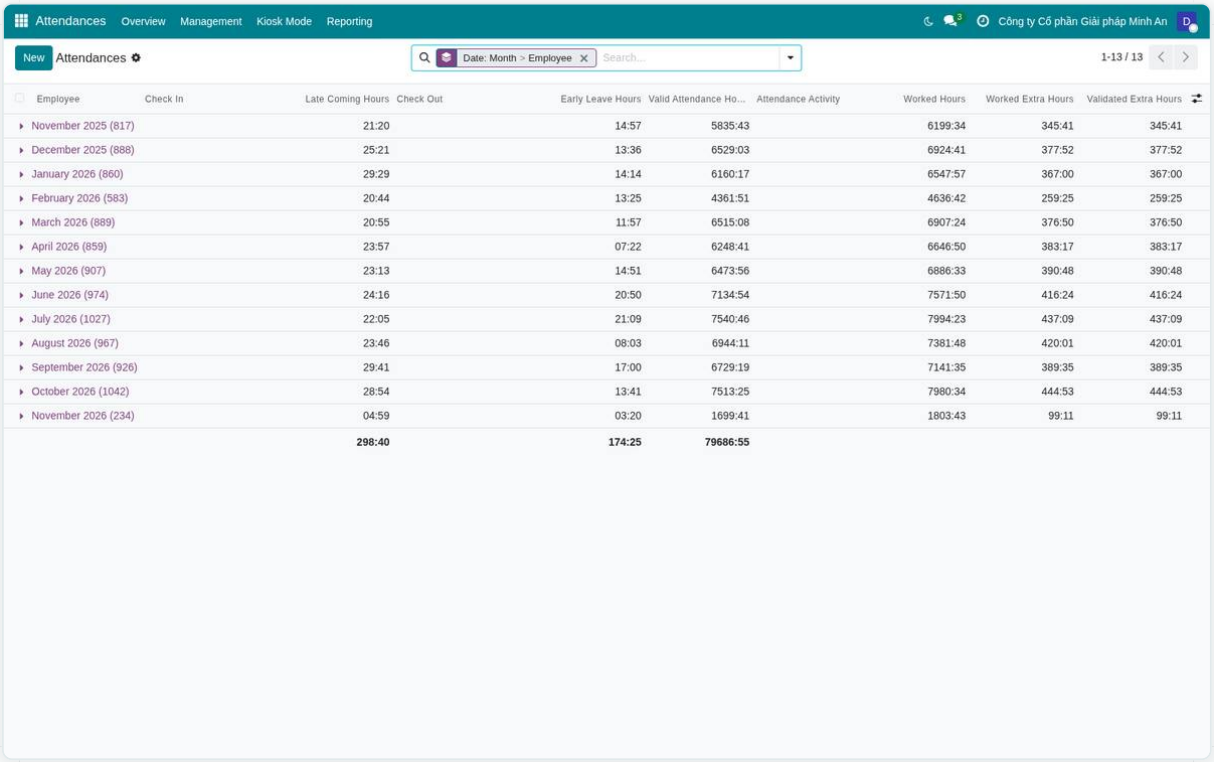
About 10 minutes. By the end of this lesson your company can read the number of attendance records by month, open an employee to see each day, open one attendance record to see the check-in and check-out times and the late and early parts, try changing the check-out time (not saved) and view the list of extra hours.

The lesson uses sample data. So that the existing data is not changed, the time correction step was captured in the changed but unsaved state; you decide whether to save or discard.

Step 1 - Open the attendance table

Click **Overview** in the menu bar, then click **Dashboard**.

> *Path:* `Attendances > Overview > Dashboard`



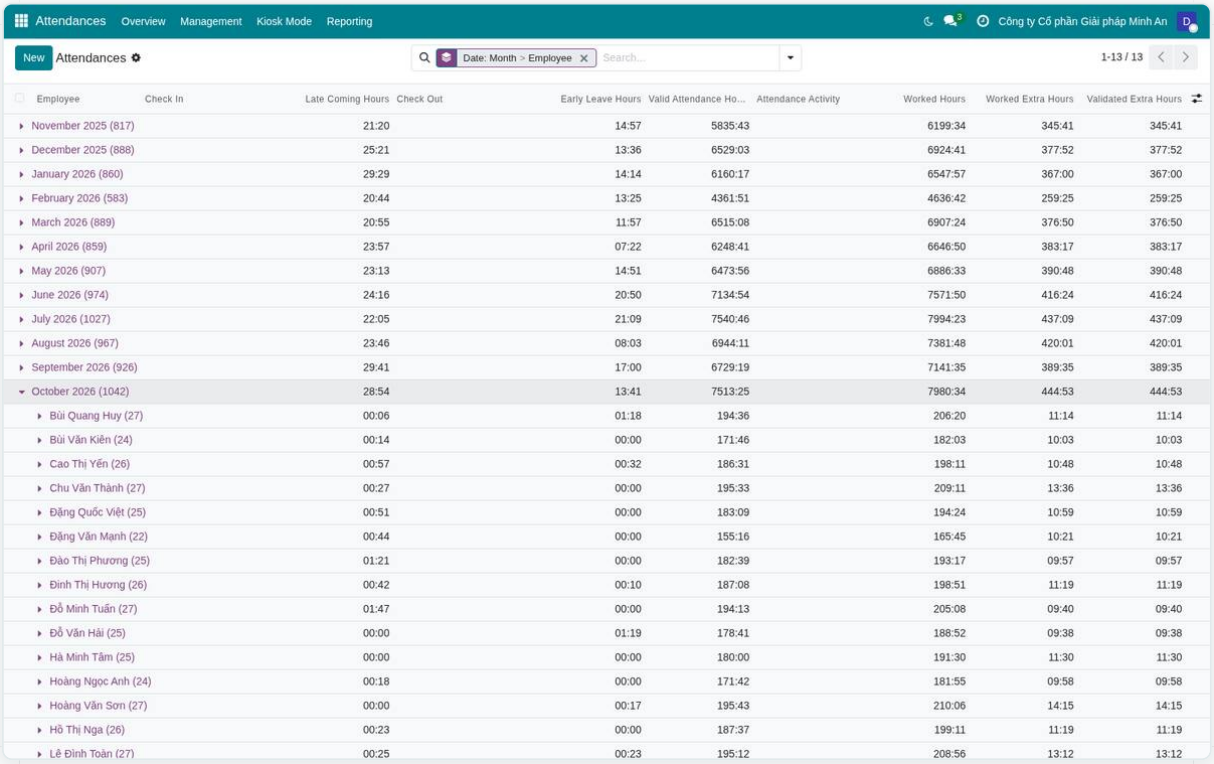
Employee	Check In	Late Coming Hours	Check Out	Early Leave Hours	Valid Attendance Ho...	Attendance Activity	Worked Hours	Worked Extra Hours	Validated Extra Hours
November 2025 (817)		21:20		14:57	5835:43		6199:34	345:41	345:41
December 2025 (888)		25:21		13:36	6529:03		6924:41	377:52	377:52
January 2026 (860)		29:29		14:14	6160:17		6547:57	367:00	367:00
February 2026 (583)		20:44		13:25	4361:51		4636:42	259:25	259:25
March 2026 (889)		20:55		11:57	6515:08		6907:24	376:50	376:50
April 2026 (859)		23:57		07:22	6248:41		6646:50	383:17	383:17
May 2026 (907)		23:13		14:51	6473:56		6886:33	390:48	390:48
June 2026 (974)		24:16		20:50	7134:54		7571:50	416:24	416:24
July 2026 (1027)		22:05		21:09	7540:46		7994:23	437:09	437:09
August 2026 (967)		23:46		08:03	6944:11		7381:48	420:01	420:01
September 2026 (926)		29:41		17:00	6729:19		7141:35	389:35	389:35
October 2026 (1042)		28:54		13:41	7513:25		7980:34	444:53	444:53
November 2026 (234)		04:59		03:20	1699:41		1803:43	99:11	99:11
		298:40		**174:25**	**79686:55**				

You should see: a list grouped by **Date: Month** then **Employee**, with 13 month rows from "November 2025 (817)" to "November 2026 (234)"; the number in brackets is the number of attendance records of the month. October 2026 has 1042 records. The last row of the table adds up three columns: **Late Coming Hours**, **Early Leave Hours** and **Valid Attendance Hours**.

Step 2 - Open a month to see each employee

Click the row **October 2026 (1042)**.

> *Path:* `Attendances > Overview > Dashboard` , row **October 2026**



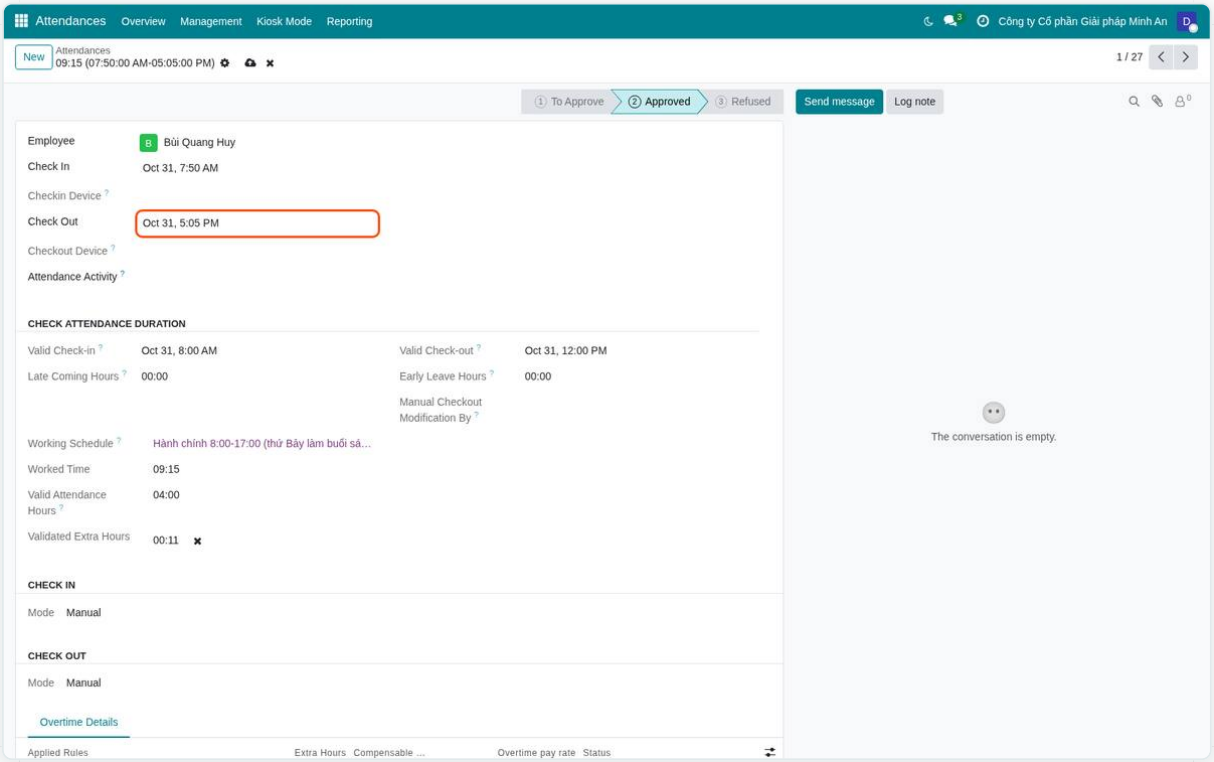
Employee	Check In	Late Coming Hours	Check Out	Early Leave Hours	Valid Attendance Ho...	Attendance Activity	Worked Hours	Worked Extra Hours	Validated Extra Hours
November 2025 (817)		21:20		14:57	5835:43		6199:34	345:41	345:41
December 2025 (888)		25:21		13:36	6529:03		6924:41	377:52	377:52
January 2026 (860)		29:29		14:14	6160:17		6547:57	367:00	367:00
February 2026 (583)		20:44		13:25	4361:51		4636:42	259:25	259:25
March 2026 (889)		20:55		11:57	6515:08		6907:24	376:50	376:50
April 2026 (859)		23:57		07:22	6248:41		6646:50	383:17	383:17
May 2026 (907)		23:13		14:51	6473:56		6886:33	390:48	390:48
June 2026 (974)		24:16		20:50	7134:54		7571:50	416:24	416:24
July 2026 (1027)		22:05		21:09	7540:46		7994:23	437:09	437:09
August 2026 (967)		23:46		08:03	6944:11		7381:48	420:01	420:01
September 2026 (926)		29:41		17:00	6729:19		7141:35	389:35	389:35
October 2026 (1042)		28:54		13:41	7513:25		7980:34	444:53	444:53
Bùi Quang Huy (27)		00:06		01:18	194:36		206:20	11:14	11:14
Bùi Văn Kiên (24)		00:14		00:00	171:46		182:03	10:03	10:03
Cao Thị Yến (26)		00:57		00:32	186:31		198:11	10:48	10:48
Chu Văn Thành (27)		00:27		00:00	195:33		209:11	13:36	13:36
Đặng Quốc Việt (25)		00:51		00:00	183:09		194:24	10:59	10:59
Đặng Văn Mạnh (22)		00:44		00:00	155:16		165:45	10:21	10:21
Đào Thị Phương (25)		01:21		00:00	182:39		193:17	09:57	09:57
Đinh Thị Hương (26)		00:42		00:10	187:08		198:51	11:19	11:19
Đỗ Minh Tuấn (27)		01:47		00:00	194:13		205:08	09:40	09:40
Đỗ Văn Hải (25)		00:00		01:19	178:41		188:52	09:38	09:38
Hà Minh Tâm (25)		00:00		00:00	180:00		191:30	11:30	11:30
Hoàng Ngọc Anh (24)		00:18		00:00	171:42		181:55	09:58	09:58
Hoàng Văn Sơn (27)		00:00		00:17	195:43		210:06	14:15	14:15
Hồ Thị Nga (26)		00:23		00:00	187:37		199:11	11:19	11:19
Lê Đình Toàn (27)		00:25		00:23	195:12		208:56	13:12	13:12

You should see: below the month row, each employee appears with the number of attendance records in the month, for example "Bùi Quang Huy (27)", "Bùi Văn Kiên (24)", "Cao Thị Yến (26)". Each row shows that person's late hours, early leave hours, valid attendance hours, worked hours and extra hours worked for the month.

Step 3 - Open an attendance record and try changing the check-out time

Click the row **Bùi Quang Huy (27)**, then click the first record (31 October). Click the **Check Out** box, type `10/31/2026 05:05:00 PM` and press Enter.

> *Path:* `Attendances > Overview > Dashboard` , row **October 2026**, row **Bùi Quang Huy**

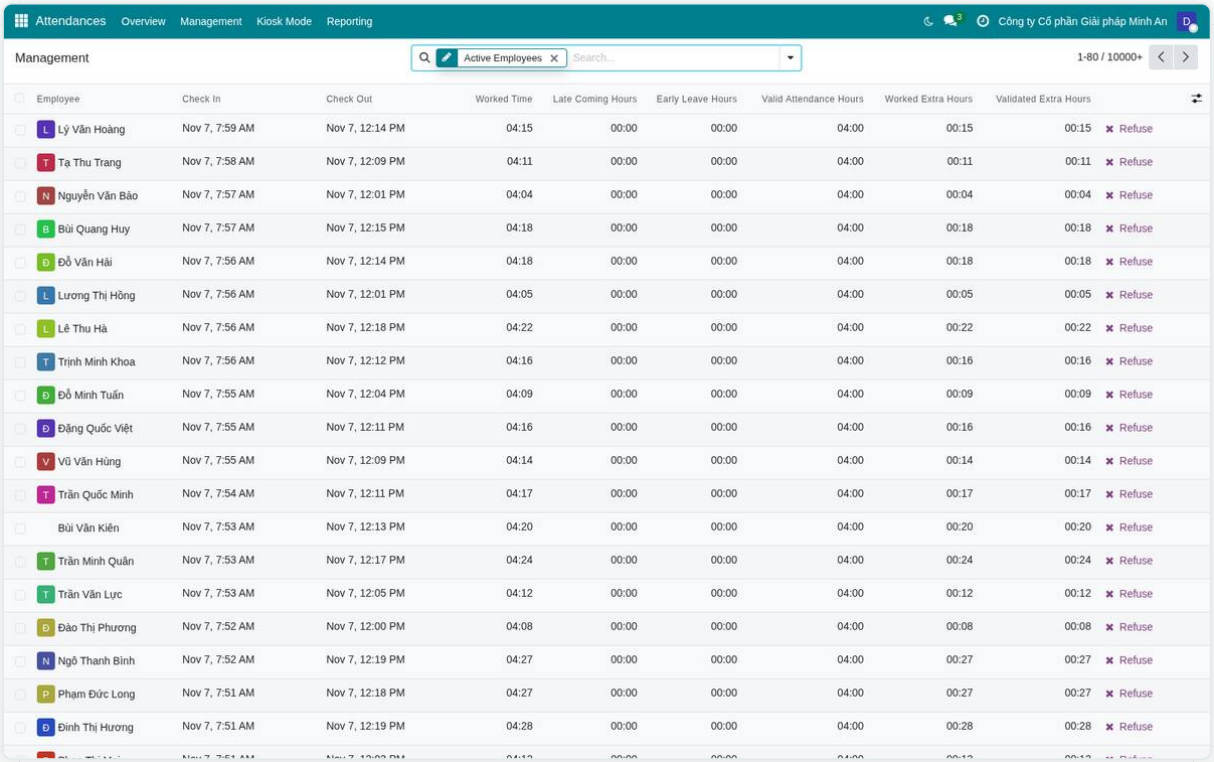


You should see: the **Check Out** box shows "Oct 31, 5:05 PM" (circled) and **Check In** is "Oct 31, 7:50 AM". The **Worked Time** line is recalculated to 09:15; **Valid Check-in** is 8:00 AM and **Valid Check-out** is 12:00 PM according to the working schedule in the previous lesson. The status bar is at **Approved**. The cloud icon and the x icon appear next to the record name because it is not saved: click the cloud to save the new time, click the x to keep the old check-out time (12:01 PM).

Step 4 - View the list of extra hours of the whole company

Click **Management** in the menu bar. Click the x on the filter label **To Approve**.

> *Path:* `Attendances > Management`



You should see: the list of the latest attendance records, with the counter reading "1-80 / 10000+". The first row is Lý Văn Hoàng on 7 November: check-in 7:59 AM, check-out 12:14 PM, **Worked Time** 04:15, **Valid Attendance Hours** 04:00, **Worked Extra Hours** 00:15 and **Validated Extra Hours** 00:15. At the end of each row there is a **Refuse** button, next to the **Validated Extra Hours** column.

Try this: in step 3 change the check-out time to 11:00 AM instead of 5:05 PM and see whether **Early Leave Hours** appears, then click the x to discard.

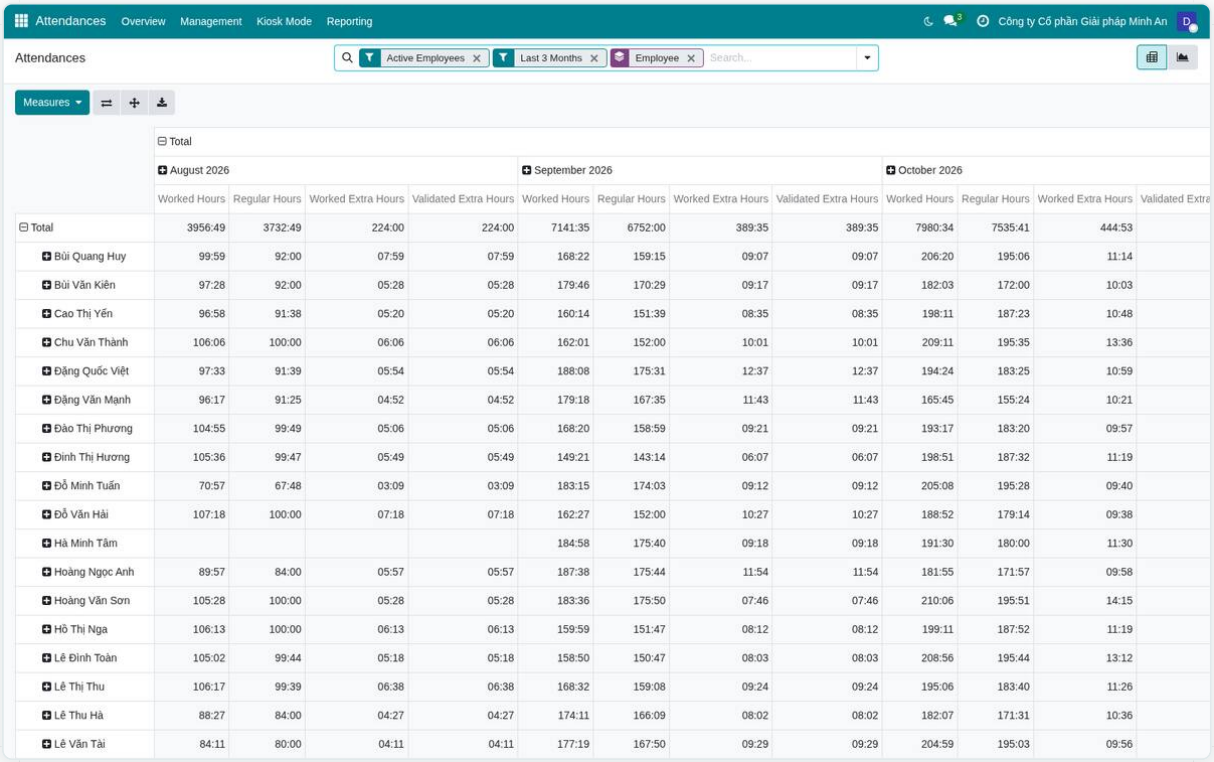
16 VIEW ATTENDANCE BY MONTH

About 5 minutes. By the end of this lesson your company can open the attendance report, read each person's worked hours by month and see the chart of the whole company's worked hours by month over 13 months.

Step 1 - Open the attendance report

Open the **Reporting** menu and click **Attendances**.

> *Path:* `Attendances > Reporting > Attendances`



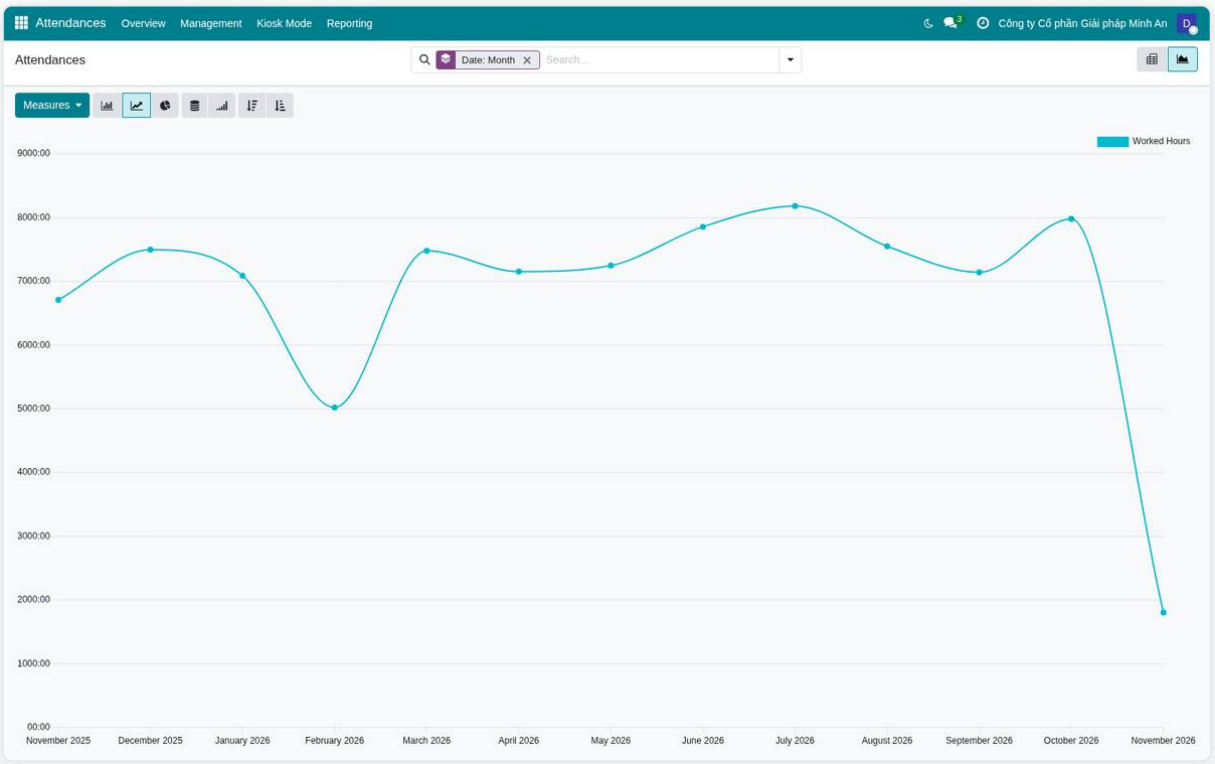
	August 2026				September 2026				October 2026			
	Worked Hours	Regular Hours	Worked Extra Hours	Validated Extra Hours	Worked Hours	Regular Hours	Worked Extra Hours	Validated Extra Hours	Worked Hours	Regular Hours	Worked Extra Hours	Validated Extra
Total	3956:49	3732:49	224:00	224:00	7141:35	6752:00	389:35	389:35	7980:34	7535:41	444:53	
Bùi Quang Huy	99:59	92:00	07:59	07:59	168:22	159:15	09:07	09:07	206:20	195:06	11:14	
Bùi Văn Kiên	97:28	92:00	05:28	05:28	179:46	170:29	09:17	09:17	182:03	172:00	10:03	
Cao Thị Yến	96:58	91:38	05:20	05:20	160:14	151:39	08:35	08:35	198:11	187:23	10:48	
Chu Văn Thành	106:06	100:00	06:06	06:06	162:01	152:00	10:01	10:01	209:11	195:35	13:36	
Đặng Quốc Việt	97:33	91:39	05:54	05:54	188:08	175:31	12:37	12:37	194:24	183:25	10:59	
Đặng Văn Mạnh	96:17	91:25	04:52	04:52	179:18	167:35	11:43	11:43	165:45	155:24	10:21	
Đào Thị Phương	104:55	99:49	05:06	05:06	168:20	158:59	09:21	09:21	193:17	183:20	09:57	
Đinh Thị Hương	105:36	99:47	05:49	05:49	149:21	143:14	06:07	06:07	198:51	187:32	11:19	
Đỗ Minh Tuấn	70:57	67:48	03:09	03:09	183:15	174:03	09:12	09:12	205:08	195:28	09:40	
Đỗ Văn Hải	107:18	100:00	07:18	07:18	162:27	152:00	10:27	10:27	188:52	179:14	09:38	
Hà Minh Tâm					184:58	175:40	09:18	09:18	191:30	180:00	11:30	
Hoàng Ngọc Anh	89:57	84:00	05:57	05:57	187:38	175:44	11:54	11:54	181:55	171:57	09:58	
Hoàng Văn Sơn	105:28	100:00	05:28	05:28	183:36	175:50	07:46	07:46	210:06	195:51	14:15	
Hồ Thị Nga	106:13	100:00	06:13	06:13	159:59	151:47	08:12	08:12	199:11	187:52	11:19	
Lê Đình Toàn	105:02	99:44	05:18	05:18	158:50	150:47	08:03	08:03	208:56	195:44	13:12	
Lê Thị Thu	106:17	99:39	06:38	06:38	168:32	159:08	09:24	09:24	195:06	183:40	11:26	
Lê Thu Hà	88:27	84:00	04:27	04:27	174:11	166:09	08:02	08:02	182:07	171:31	10:36	
Lê Văn Tài	84:11	80:00	04:11	04:11	177:19	167:50	09:29	09:29	204:59	195:03	09:56	

You should see: a Pivot table with three filter labels, **Active Employees**, **Last 3 Months** and the group **Employee**. The columns are August, September and October 2026; each month has four figures: **Worked Hours**, **Regular Hours**, **Worked Extra Hours** and **Validated Extra Hours**. Each row is an employee. The **Total** row of September 2026 shows worked hours of 7141:35.

Step 2 - See all 13 months on one chart

Click the x on the filter label **Last 3 Months** and on the other filter labels, then click the **Graph** icon at the top right. Open the filter box at the end of the search bar, and in the **Group By** column choose **Date** and then **Month**.

> *Path:* `Attendances > Reporting > Attendances` , the **Graph** icon



You should see: the **Worked Hours** line passes through 13 points from November 2025 to November 2026. It is lowest in February 2026 because of the Tet holiday (14 to 22 February), highest around July 2026, and drops in November 2026 because the data for that month only runs to 7 November. Worked hours for October 2026 are 7980:34.

Try this: in step 2 change the line chart to a bar chart with the first icon in the button row above the chart, then compare February 2026 with the other months.

17 VIEW THE TIME CLOCKS AND THE DATA THEY UPLOADED

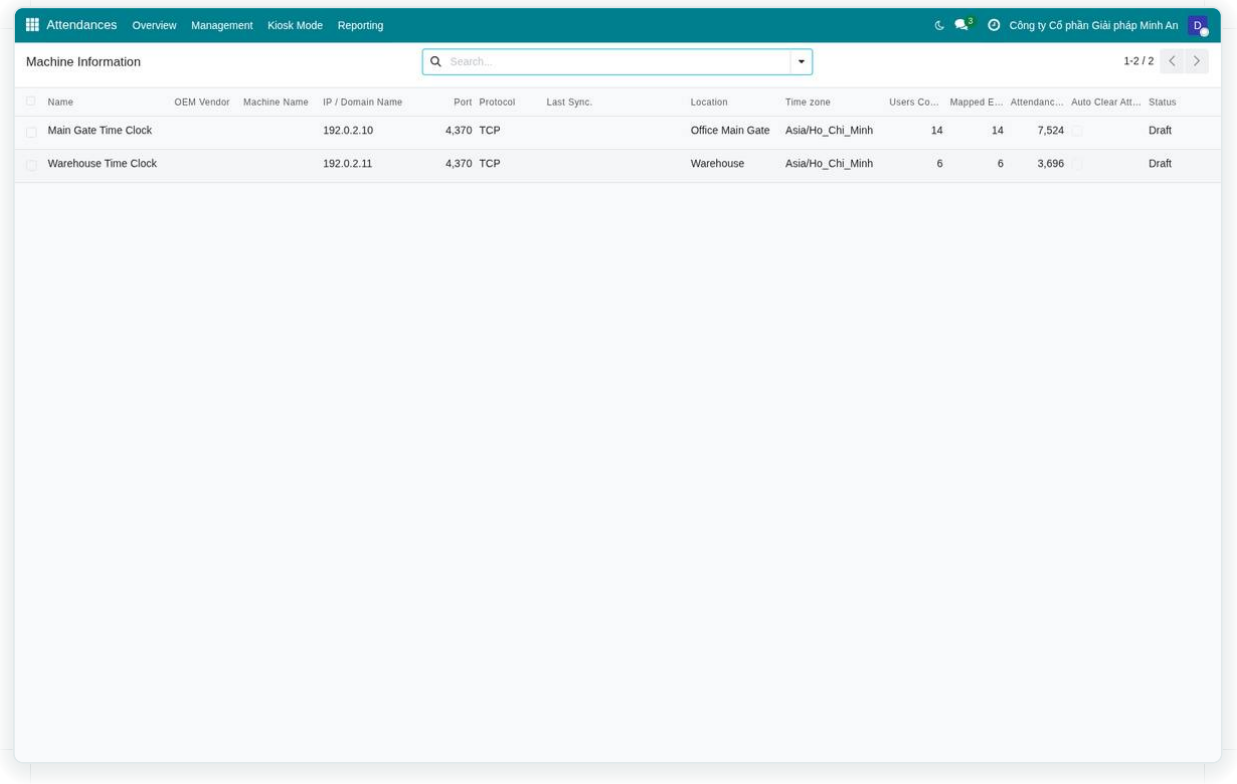
About 5 minutes. By the end of this lesson your company has seen the list of 2 sample time clocks and the check-in and check-out data that the two clocks pushed to the system. This lesson is for viewing only: the demo system has no real device, so there is no connect, test connection or download action to try.

The **Attendance Machines** menu does not appear for the `demo` account, so the two steps below use direct links. Paste the link into a browser that is logged in with `demo` / `demo`.

Step 1 - Open the list of time clocks with a link

Paste the link `https://v19demo-int.demo.viindoo.cloud/web#action=to_attendance_device.attendance_device_list_action` into the address bar and press Enter.

> *Path:* link `https://v19demo-int.demo.viindoo.cloud/web#action=to_attendance_device.attendance_device_list_action` (not in the menu of the demo account)



You should see: the title "Machine Information" and 2 rows.

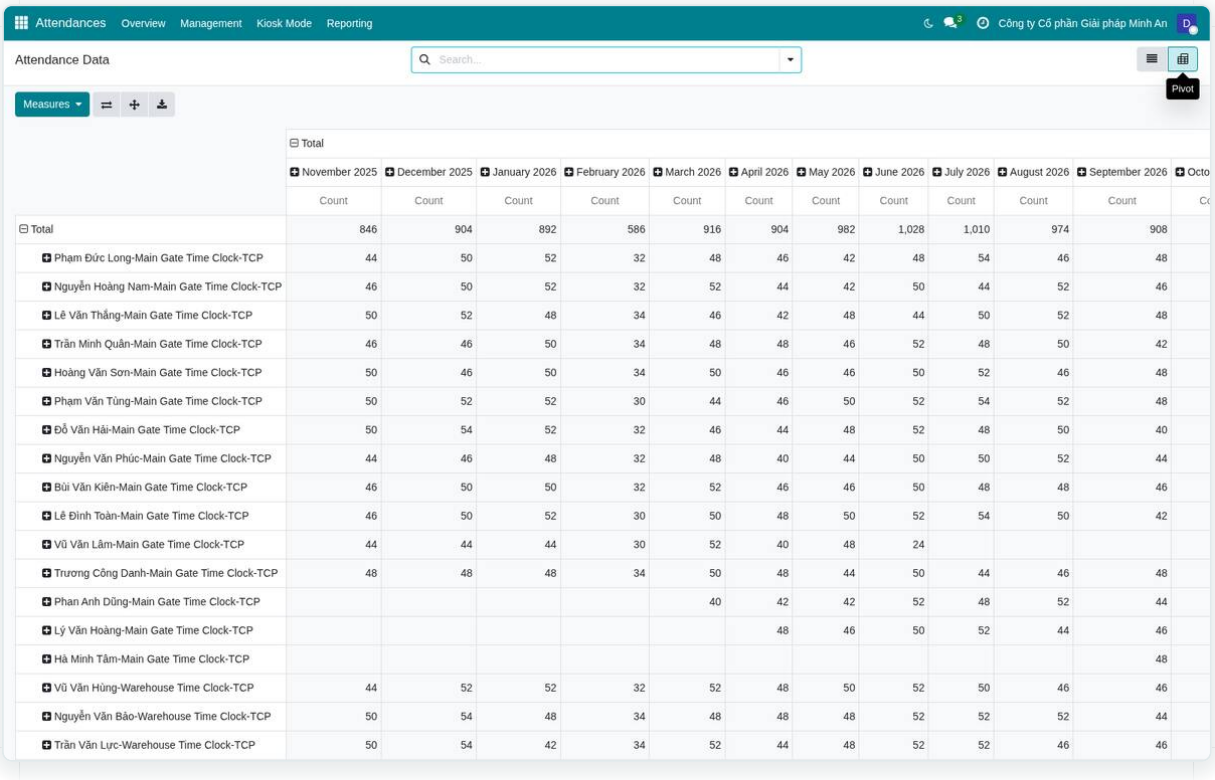
Machine	IP	Port	Users on the machine	Attendance records
Main Gate Time Clock	192.0.2.10	4,370	14	7,524
Warehouse Time Clock	192.0.2.11	4,370	6	3,696

The **Status** column of both machines is "Draft", **Protocol** is TCP, and **Location** is Office Main Gate and Warehouse respectively. The 192.0.2.x addresses are test addresses with no real machine attached, which is right for the demo system.

Step 2 - Open the attendance data uploaded from the machines with a link

Paste the link `https://v19demo-int.demo.viindoo.cloud/web#action=to_attendance_device.action_user_attendance_data` into the address bar and press Enter. Click the **Pivot** icon at the top right.

> *Path:* link `https://v19demo-int.demo.viindoo.cloud/web#action=to_attendance_device.action_user_attendance_data` (not in the menu of the demo account)



You should see: the title "Attendance Data" and a Pivot table whose columns are the months from November 2025 and whose rows are each machine user (the person's name followed by the machine name). The **Total** row of November 2025 shows 846 records and that of June 2026 shows 1,028 records. Each attendance of an Engineering or Warehouse and Logistics employee is made of two records, one at check-in and one at check-out.

Try this: in step 2 click the **List** icon (the first icon at the top right) to read each check-in and check-out swipe by time, then compare it with the attendance list in the previous lesson.

PART VI. PAYROLL

This part answers the questions: **where are salary, social insurance, health insurance, unemployment insurance and personal income tax calculated for each person, how are they calculated, and how does a manager see the payroll cost by month and by department?** The payroll accountant follows the lessons on setup and on running the payslip batch. The director reads the analysis lesson. The data is sample data for "Công ty Cổ phần Giải pháp Minh An": 41 employees and 13 payslip batches from November 2025 to November 2026.

The part has four lessons: one to read the salary structure and the contribution types yourself, one to read the payslip batches by month, one to read a single payslip with insurance and personal income tax, and one to open three analysis reports. The `demo` account has Payroll administrator rights. Every image was taken on 9 November 2026. The calculate, verify and payment buttons were not clicked while shooting: the batch images were taken on the November 2026 batch (still a draft) and the October 2026 batch (closed); the payslip images were taken on an October 2026 payslip in the Done status. The demo system is reloaded every night, so whatever your company clicks goes back to how it was.

18 READ THE SALARY STRUCTURE AND THE CONTRIBUTION TYPES

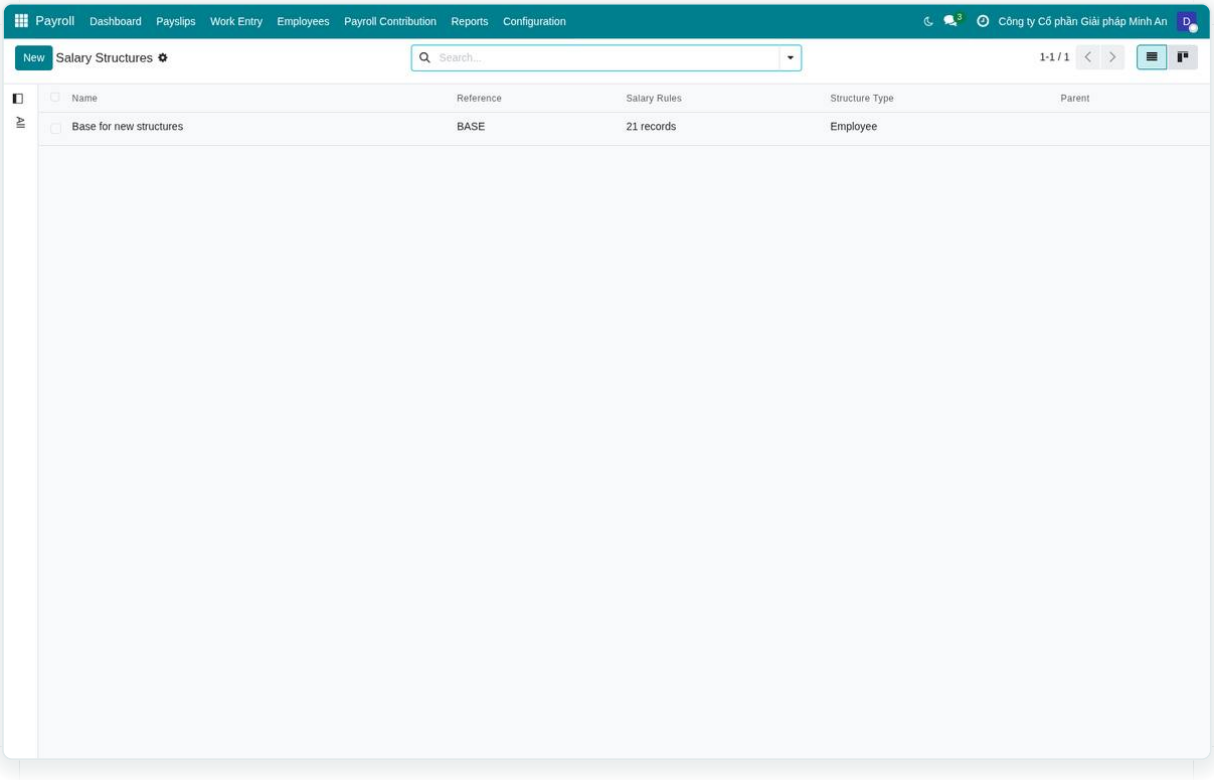
About 15 minutes. By the end of this lesson your company can read the salary structure in use, the list of salary rules and the order in which they are calculated, the four contribution types (social insurance, health insurance, unemployment insurance, labor union) with the employee and company rates, and the personal income tax rules.

Log in with the account `demo` / `demo` as described in the section "How to use this handbook". This lesson is read-only and changes nothing in the configuration.

Step 1 - Open the list of salary structures

Open the **Configuration** menu, go to the **Payroll Entry** group and click **Salary Structures**.

> *Path:* `Payroll > Configuration > Payroll Entry > Salary Structures`

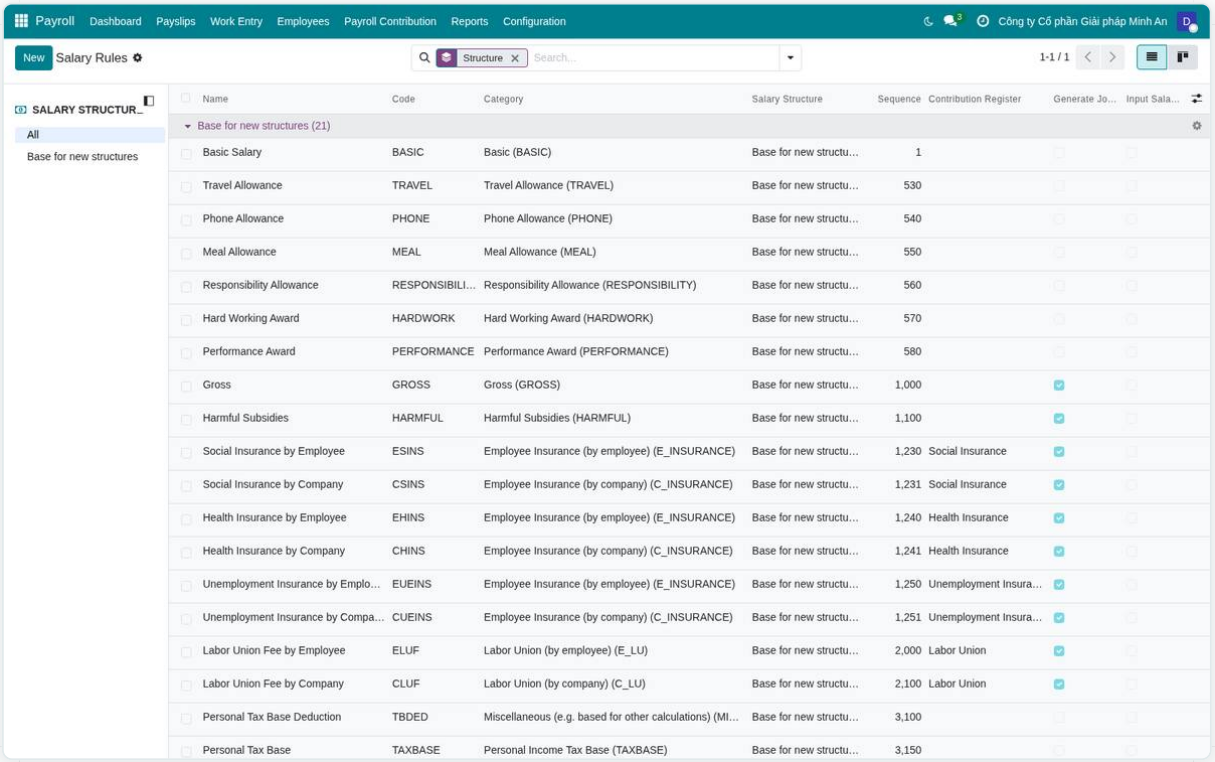


You should see: 1 salary structure named "Base for new structures", reference BASE, with 21 salary rules (the **Salary Rules** column reads "21 records"). The whole company uses this one structure.

Step 2 - Read the salary rules and the order of calculation

Open the **Configuration** menu, the **Payroll Entry** group, and click **Salary Rules**.
Click the group row **Base for new structures (21)** to open the rules.

> *Path:* `Payroll > Configuration > Payroll Entry > Salary Rules`



You should see: 21 rules sorted by the **Sequence** column, calculated from top to bottom. Some of the main rules:

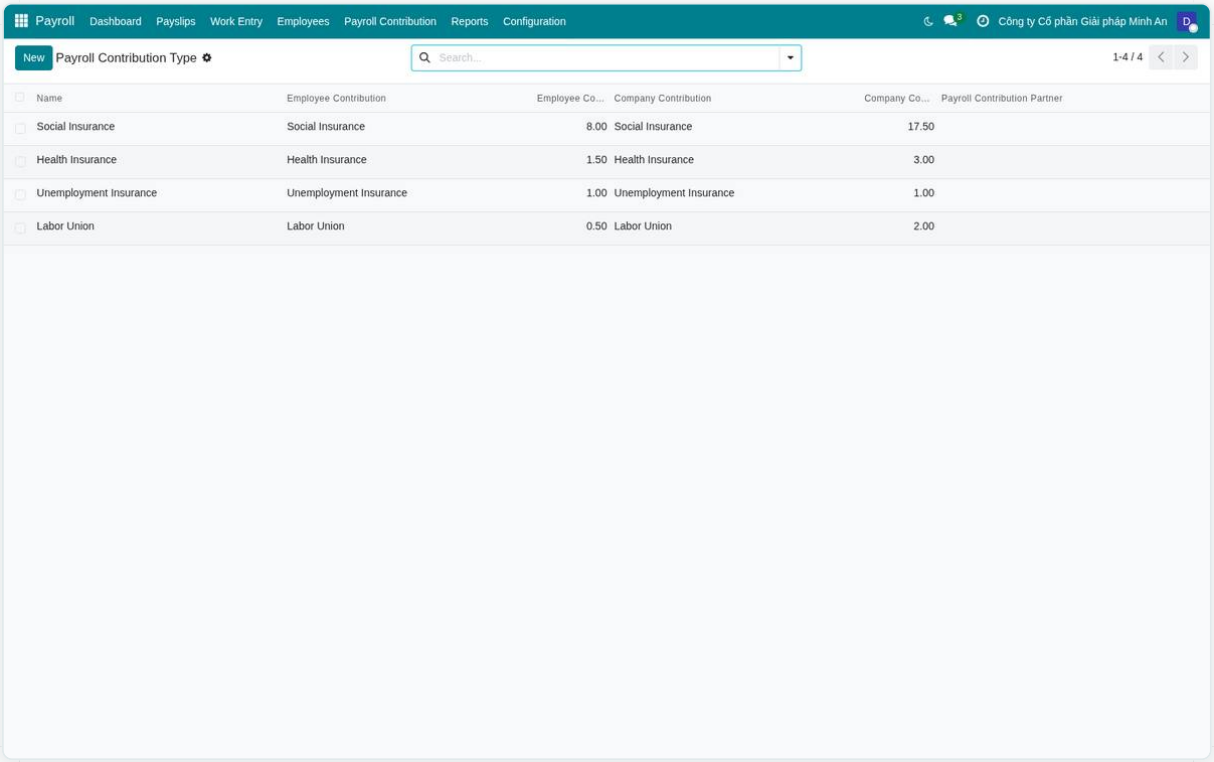
Rule	Code	Sequence
Basic Salary	BASIC	1
Meal Allowance	MEAL	550
Gross	GROSS	1,000
Social Insurance by Employee	ESINS	1,230
Labor Union Fee by Employee	ELUF	2,000
Personal Tax Base	TAXBASE	3,150

The insurance and labor union rules have a tick in the **Generate Journal Item** column and are linked to a **Contribution Register** (Social Insurance, Health Insurance, Unemployment Insurance, Labor Union).

Step 3 - Read the four contribution types and their rates

Click **Payroll Contribution** in the menu bar, then click **Payroll Contribution Type**.

> *Path:* `Payroll > Payroll Contribution > Payroll Contribution Type`



You should see: 4 rows, each with the employee contribution rate and the company contribution rate (unit: %).

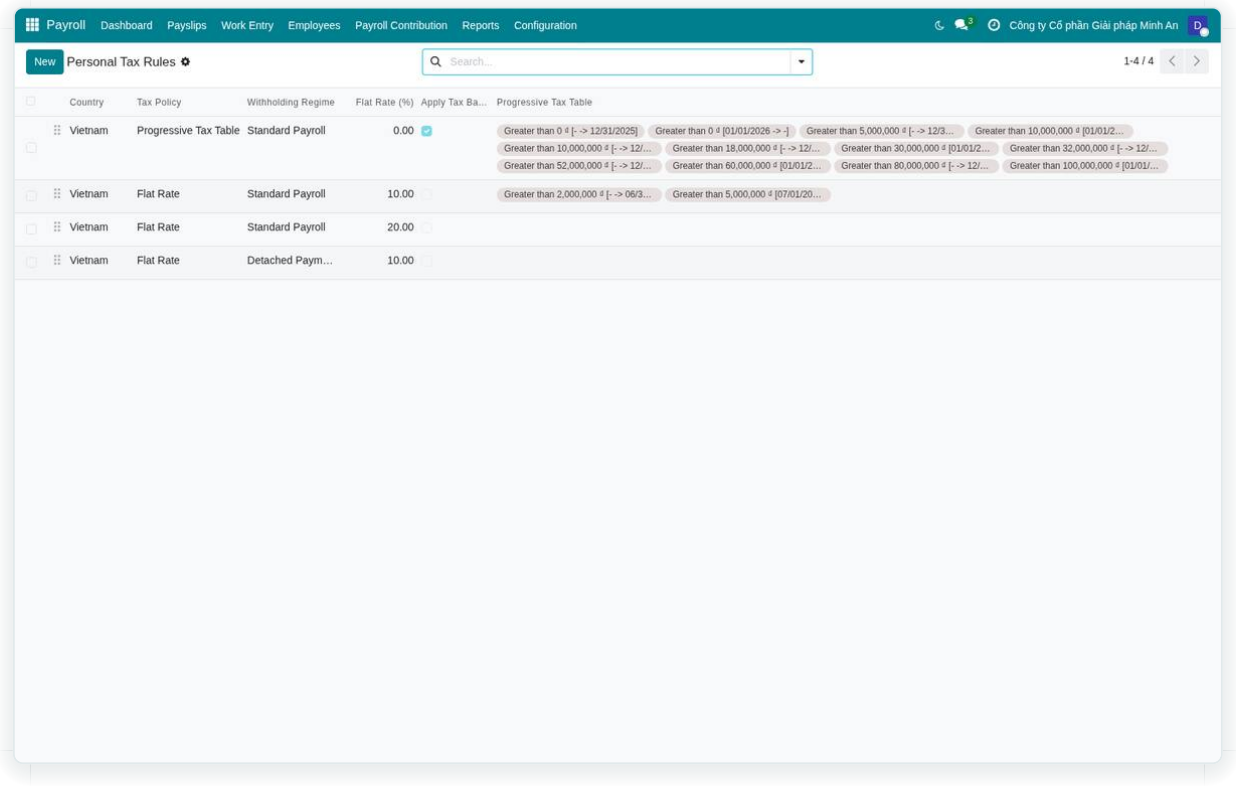
Type	Employee contribution	Company contribution
Social Insurance	8.00	17.50
Health Insurance	1.50	3.00
Unemployment Insurance	1.00	1.00
Labor Union	0.50	2.00

When the law changes a rate, all you do is edit the two number cells on the matching row.

Step 4 - Read the personal income tax rules

Open the **Configuration** menu, the **Payroll Entry** group, and click **Personal Tax Rules**.

> *Path:* `Payroll > Configuration > Payroll Entry > Personal Tax Rules`



You should see: 4 rows, all for the country Vietnam. The first row is the "Progressive Tax Table" policy (withholding regime "Standard Payroll") with the tax brackets shown as small tags, each tag giving the income threshold and its validity dates. The other three rows are "Flat Rate" at 10.00, 20.00 and 10.00, and the last one applies to the "Detached Payment" regime.

Try it: open the social insurance row of the contribution types in Step 3 to see whether the two rate cells, 8.00 and 17.50, can be edited, then close it without saving.

19 READ THE PAYSLIP BATCHES BY MONTH

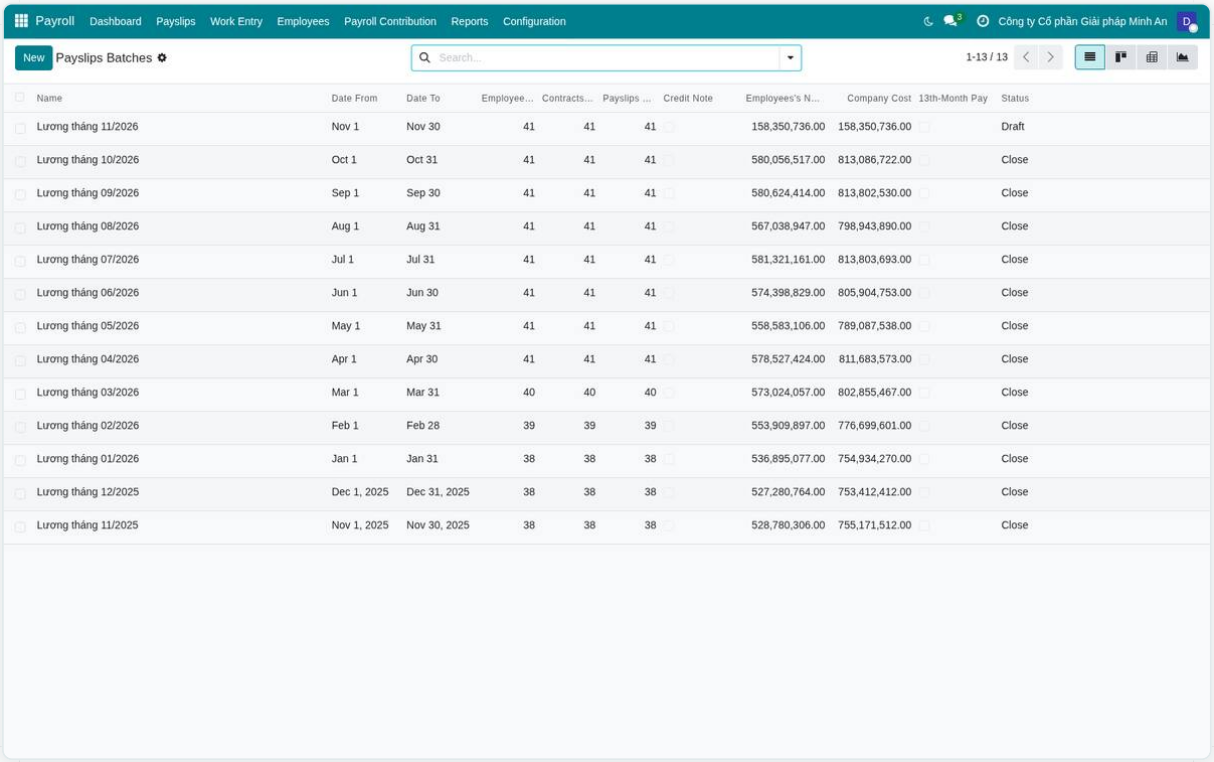
About 10 minutes. By the end of this lesson your company can read the list of 13 payslip batches with the total net pay and the total company cost of each month; open the November 2026 batch that is still a draft to see the calculation buttons; and open the October 2026 batch that is already closed to see the final state.

This lesson is read-only: the calculate and verify buttons are only pointed out with a ring and are not clicked.

Step 1 - Open the list of payslip batches

Open the **Payslips** menu and click **Payslips Batches**.

> *Path:* `Payroll > Payslips > Payslips Batches`



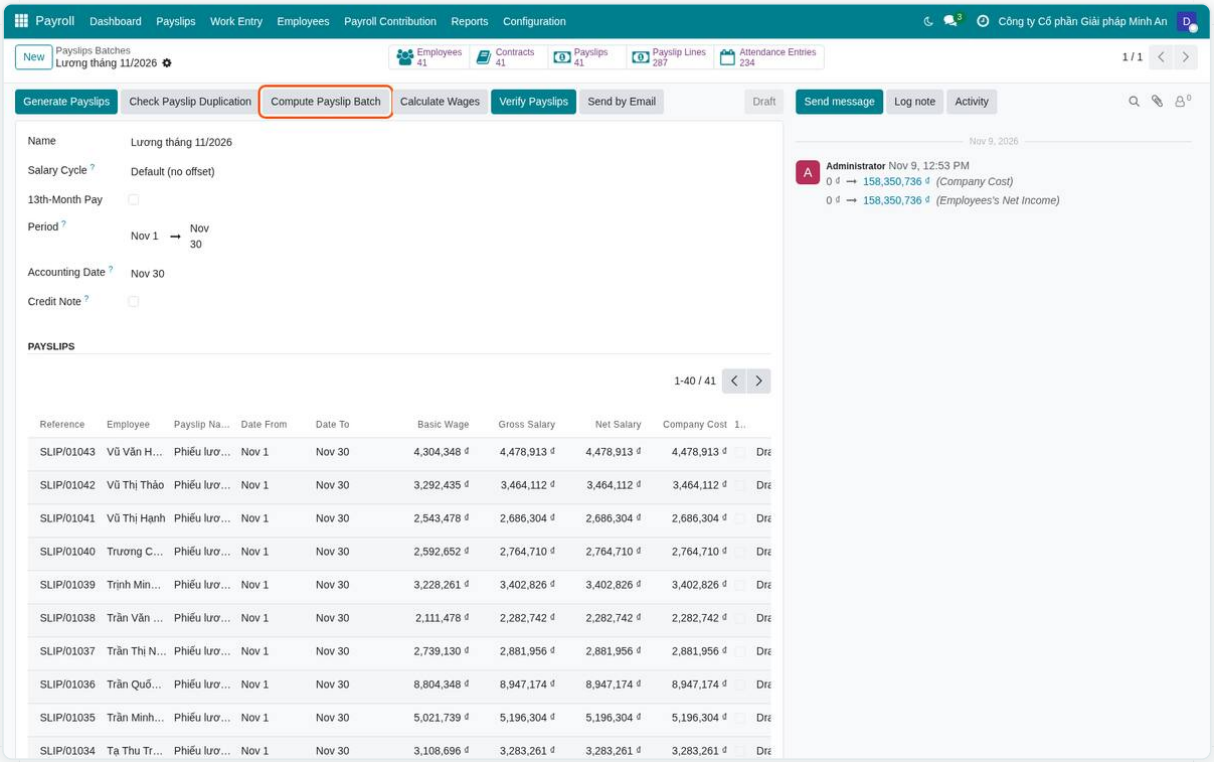
Name	Date From	Date To	Employee...	Contracts...	Payslips ...	Credit Note	Employees's N...	Company Cost	13th-Month Pay	Status
Lương tháng 11/2026	Nov 1	Nov 30	41	41	41		158,350,736.00	158,350,736.00		Draft
Lương tháng 10/2026	Oct 1	Oct 31	41	41	41		580,056,517.00	813,086,722.00		Close
Lương tháng 09/2026	Sep 1	Sep 30	41	41	41		580,624,414.00	813,802,530.00		Close
Lương tháng 08/2026	Aug 1	Aug 31	41	41	41		567,038,947.00	798,943,890.00		Close
Lương tháng 07/2026	Jul 1	Jul 31	41	41	41		581,321,161.00	813,803,693.00		Close
Lương tháng 06/2026	Jun 1	Jun 30	41	41	41		574,398,829.00	805,904,753.00		Close
Lương tháng 05/2026	May 1	May 31	41	41	41		558,583,106.00	789,087,538.00		Close
Lương tháng 04/2026	Apr 1	Apr 30	41	41	41		578,527,424.00	811,683,573.00		Close
Lương tháng 03/2026	Mar 1	Mar 31	40	40	40		573,024,057.00	802,855,467.00		Close
Lương tháng 02/2026	Feb 1	Feb 28	39	39	39		553,909,897.00	776,699,601.00		Close
Lương tháng 01/2026	Jan 1	Jan 31	38	38	38		536,895,077.00	754,934,270.00		Close
Lương tháng 12/2025	Dec 1, 2025	Dec 31, 2025	38	38	38		527,280,764.00	753,412,412.00		Close
Lương tháng 11/2025	Nov 1, 2025	Nov 30, 2025	38	38	38		528,780,306.00	755,171,512.00		Close

You should see: 13 rows, one for each month. The 12 batches from November 2025 to October 2026 have the status "Close"; the November 2026 batch has the status "Draft". The **Employees's Net Income** and **Company Cost** columns give the payroll cost of each month. For example, October 2026 has 41 employees, net income 580,056,517 and company cost 813,086,722; November 2025 has 38 employees and net income 528,780,306.

Step 2 - Open the November 2026 batch that is still a draft

Click the row **Lương tháng 11/2026** (the batch named for November 2026).

> *Path:* `Payroll > Payslips > Payslips Batches` , row **Lương tháng 11/2026**

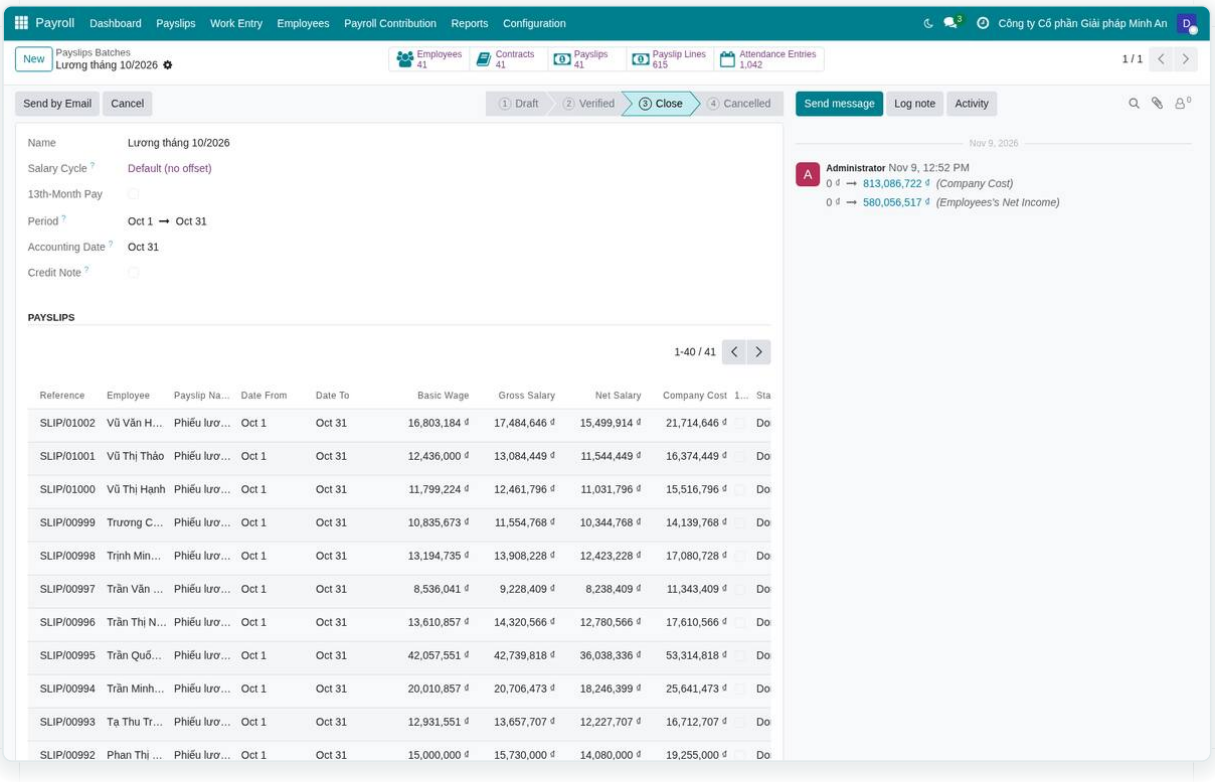


You should see: the status bar at **Draft**. The row of buttons above has **Generate Payslips**, **Check Payslip Duplication**, **Compute Payslip Batch** (ringed), **Calculate Wages**, **Verify Payslips** and **Send by Email**. The statistics buttons show 41 employees, 41 contracts, 41 payslips, 287 payslip lines and 234 attendance entries. The log on the right records a company cost and an employees' net income that are both 158,350,736. That number is small because the attendance data for November 2026 only runs to 7 November. The image was taken before any button was clicked; to calculate again, click **Compute Payslip Batch**, and to finalize, click **Verify Payslips** after checking the payslips.

Step 3 - Open the October 2026 batch that is closed

Go back to the list of payslip batches and click the row **Lương tháng 10/2026** (the batch named for October 2026).

> *Path:* `Payroll > Payslips > Payslips Batches` , row **Lương tháng 10/2026**



You should see: the status bar has four steps, **Draft**, **Verified**, **Close** and **Cancelled**, and the batch is at **Close**. The statistics buttons read 41 employees, 41 payslips, 615 payslip lines and 1,042 attendance entries. The log gives a company cost of 813,086,722 and employees' net income of 580,056,517. Below is the list of the 41 payslips of the month, each with basic wage, gross salary, net salary and company cost.

Try it: in Step 1 compare the net income of February 2026 with January 2026: February has one more employee and has the Tet holiday, so see how much the net income moves up.

20 READ A PAYSLIP WITH INSURANCE AND PERSONAL INCOME TAX

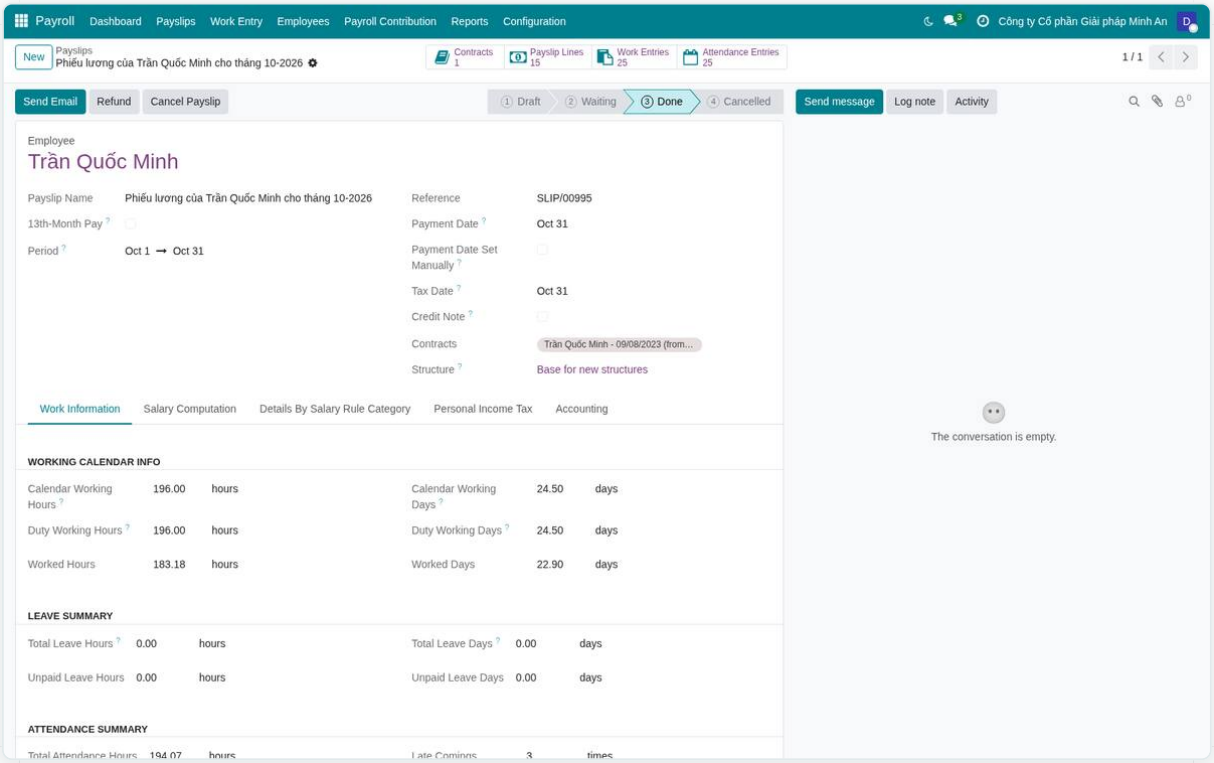
About 10 minutes. By the end of this lesson your company has opened the October 2026 payslip of one employee, read it line by line from basic salary to net salary, including social insurance, health insurance, unemployment insurance and personal income tax, re-checked the tax calculation and looked up the payment status of the payslips.

The lesson uses the payslip of "Trần Quốc Minh" (the director). All figures are sample figures.

Step 1 - Open the payslip

Open the **Payslips** menu and click **Payslips**. Type `Trần Quốc Minh` in the search box, press Enter and click the row whose payslip name ends in 10-2026.

> *Path:* `Payroll > Payslips > Payslips`

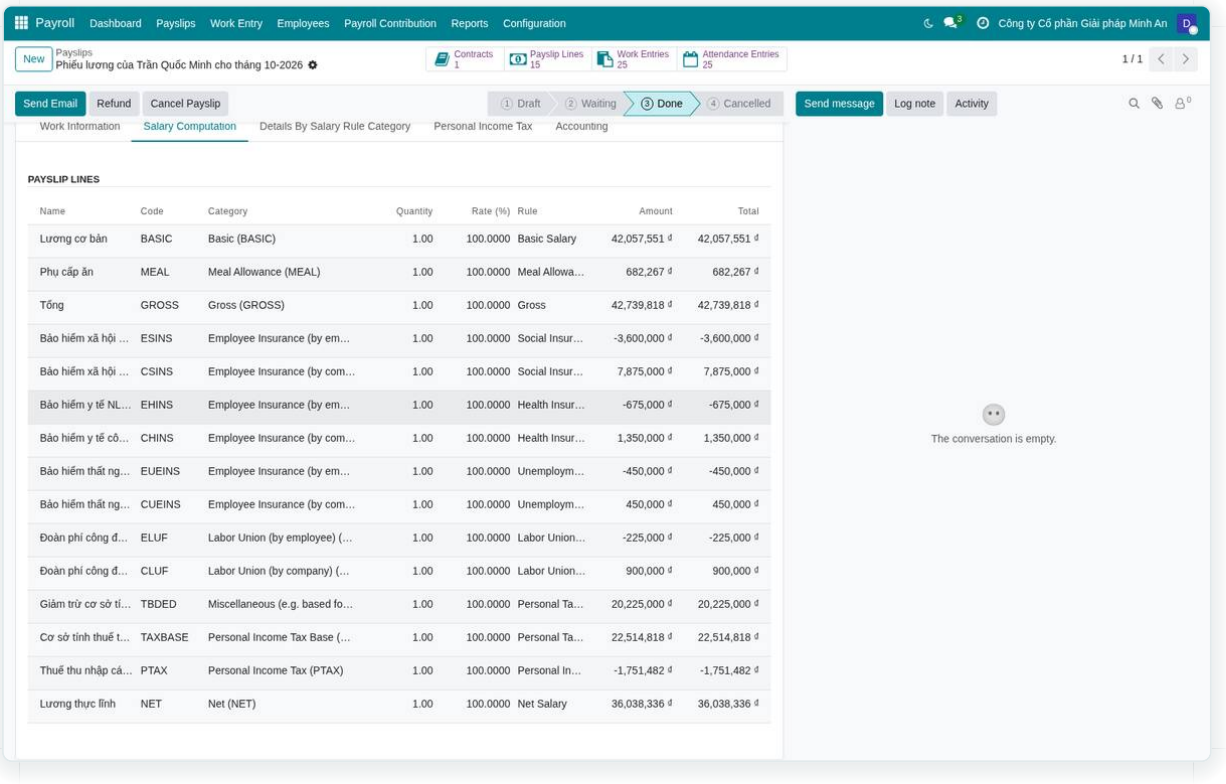


You should see: the title "Phiếu lương của Trần Quốc Minh cho tháng 10-2026" (the payslip name, kept in Vietnamese), the status bar at **Done**, reference SLIP/00995, **Period** from Oct 1 to Oct 31, **Structure** "Base for new structures". The **Work Information** tab shows **Calendar Working Hours** of 196.00 hours, **Worked Hours** of 183.18 hours and **Worked Days** of 22.90 days.

Step 2 - Read the payslip lines

Click the **Salary Computation** tab.

> *Path:* `Payroll > Payslips > Payslips` , with the payslip open, **Salary Computation** tab



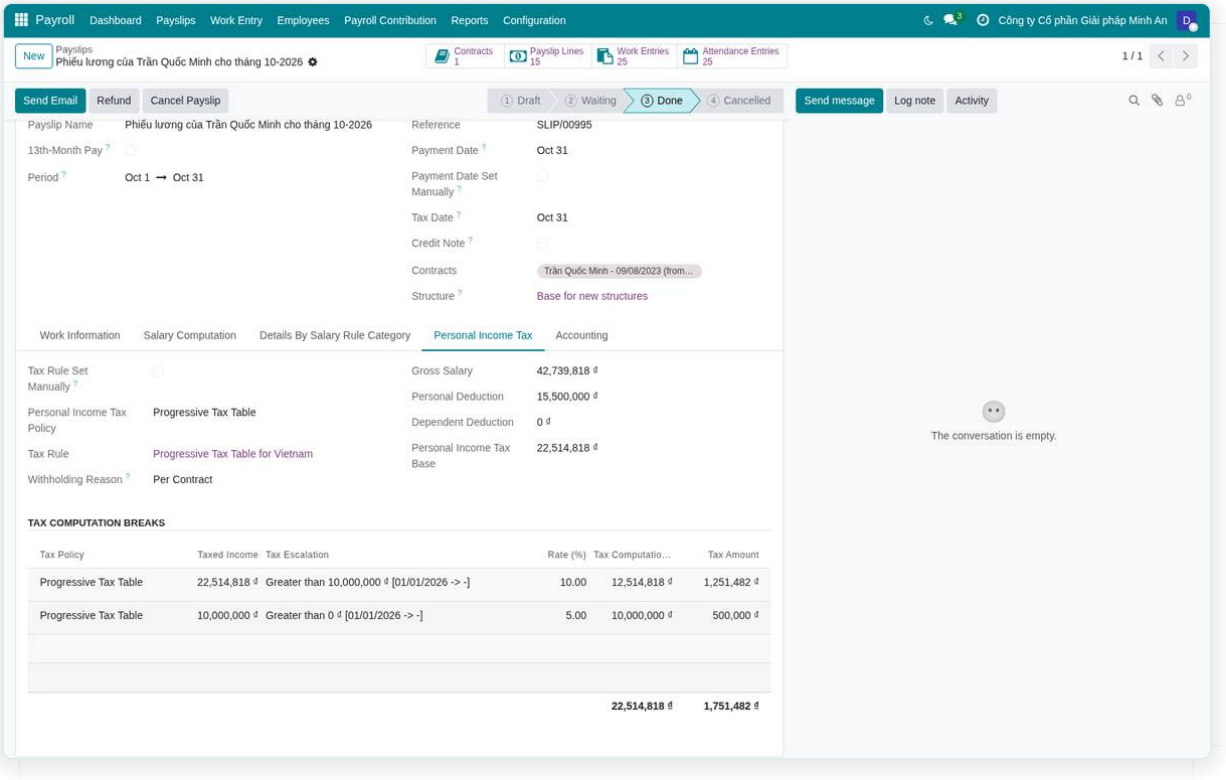
You should see: the **Payslip Lines** group lists 15 lines; a negative number is a deduction from the employee's pay. The **Rule** column gives the rule name in English; the **Name** column keeps the stored Vietnamese line names.

Line (rule)	Code	Amount (VND)
Basic Salary	BASIC	42,057,551
Meal Allowance	MEAL	682,267
Gross	GROSS	42,739,818
Social Insurance by Employee	ESINS	-3,600,000
Social Insurance by Company	CSINS	7,875,000
Health Insurance by Employee	EHINS	-675,000
Health Insurance by Company	CHINS	1,350,000
Unemployment Insurance by Employee	EUEINS	-450,000
Unemployment Insurance by Company	CUEINS	450,000
Labor Union Fee by Employee	ELUF	-225,000
Labor Union Fee by Company	CLUF	900,000
Personal Tax Base Deduction	TBDED	20,225,000
Personal Tax Base	TAXBASE	22,514,818
Personal Income Tax	PTAX	-1,751,482
Net Salary	NET	36,038,336

Step 3 - Re-check the tax calculation

Click the **Personal Income Tax** tab.

> *Path:* `Payroll > Payslips > Payslips` , with the payslip open, **Personal Income Tax** tab

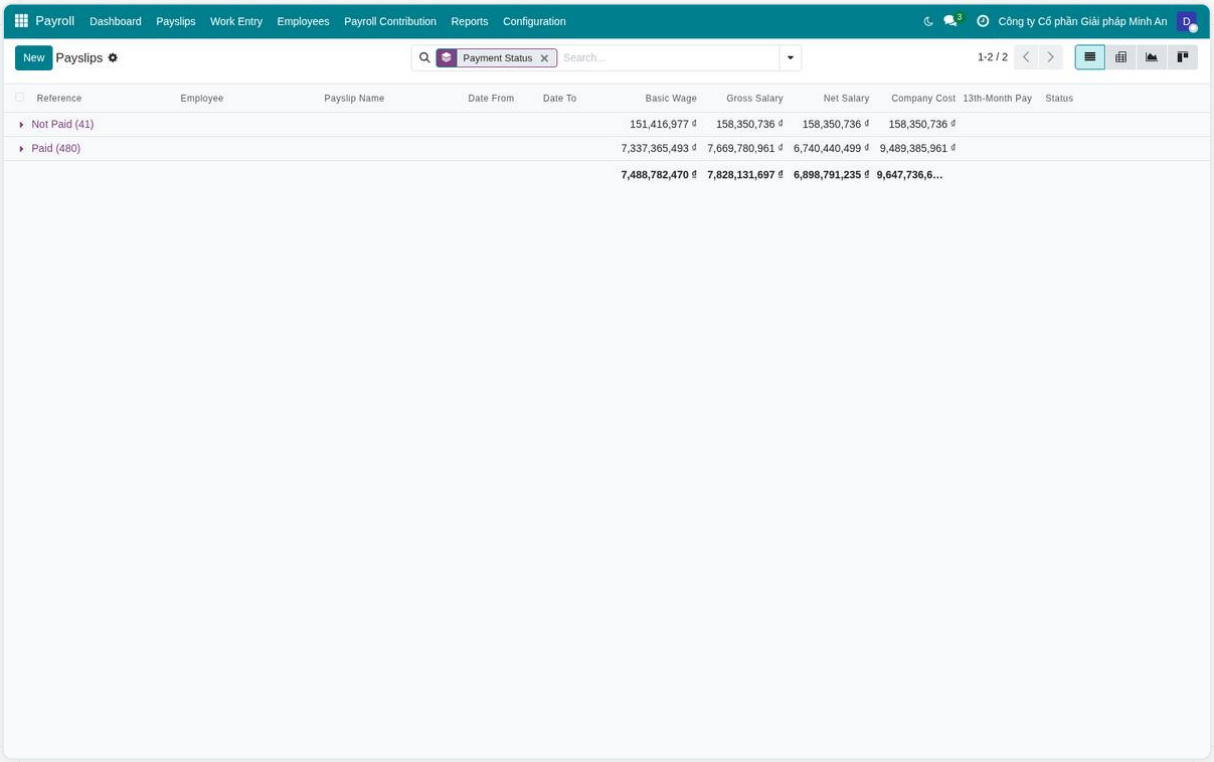


You should see: Personal Income Tax Policy is "Progressive Tax Table", **Tax Rule** is "Progressive Tax Table for Vietnam", **Withholding Reason** is "Per Contract". On the right: **Gross Salary** 42,739,818, **Personal Deduction** 15,500,000, **Dependent Deduction** 0, **Personal Income Tax Base** 22,514,818. The tax calculation table has two brackets: the 5% bracket on 10,000,000 gives 500,000 and the 10% bracket on 12,514,818 gives 1,251,482, which add up to 1,751,482, exactly the PTAX line of Step 2. You can check it yourself: the tax base equals the gross salary of 42,739,818 minus the deductions of 20,225,000 (the personal deduction of 15,500,000 plus the three employee insurance amounts of 3,600,000, 675,000 and 450,000).

Step 4 - Check the payment status of the payslips

Go back to the list of payslips, open the search options at the end of the search box, remove the filter tags that are there, and under **Custom Group** choose **Payment Status**.

> *Path:* `Payroll > Payslips > Payslips`



You should see: two groups: "Not Paid (41)" and "Paid (480)". The 480 payslips in the "Paid" group belong to the 12 closed batches; the 41 payslips in the "Not Paid" group belong to the November 2026 batch that is still a draft. The "Paid" group row adds up a net salary of 6,740,440,499, and the "Not Paid" group row adds up a net salary of 158,350,736.

Try it: open the payslip of any Sales employee, compare the social insurance, health insurance and unemployment insurance lines with the rates in the first lesson (8%, 1.5%, 1% of the insured salary), then re-check the tax base.

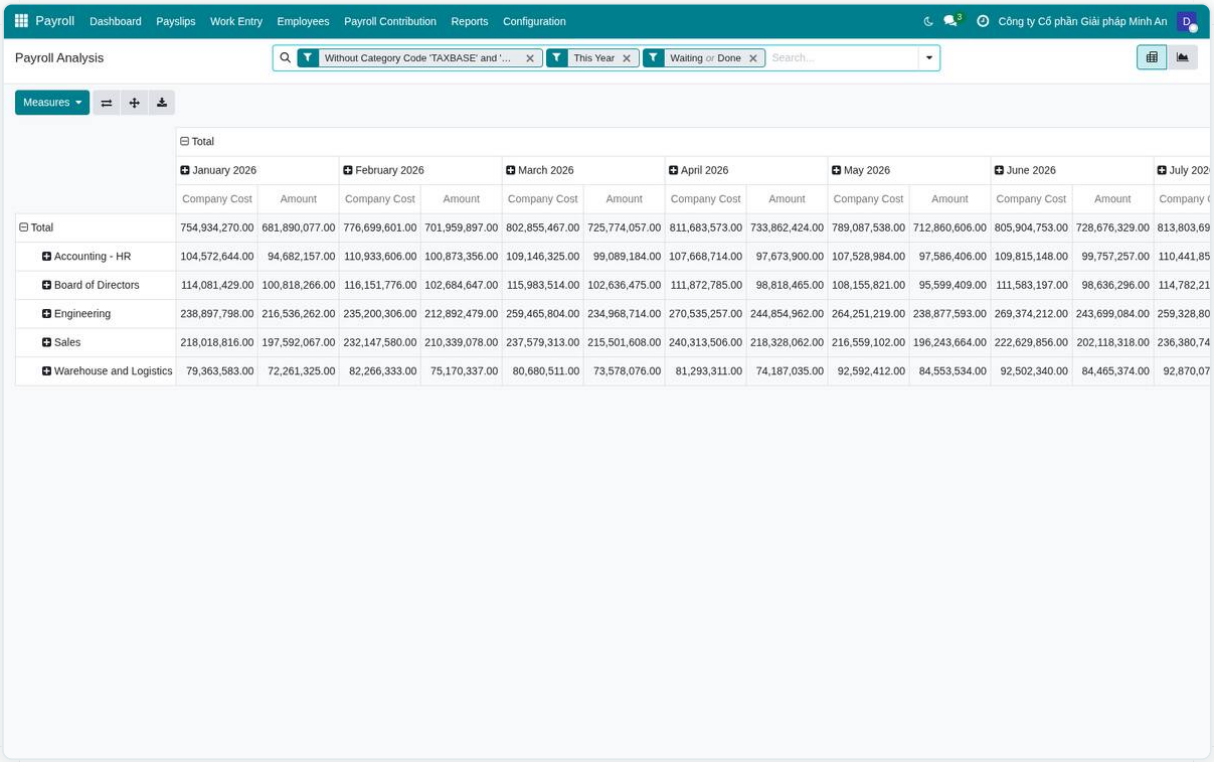
21 ANALYZE PAYROLL BY DEPARTMENT, INSURANCE AND TAX

About 10 minutes. By the end of this lesson your company has opened the three analysis reports of the Payroll app: payroll cost by department and month, the contribution registrations for insurance, and personal income tax by person and month.

Step 1 - Payroll analysis by department and month

Open the **Reports** menu and click **Payroll Analysis**.

> *Path:* `Payroll > Reports > Payroll Analysis`



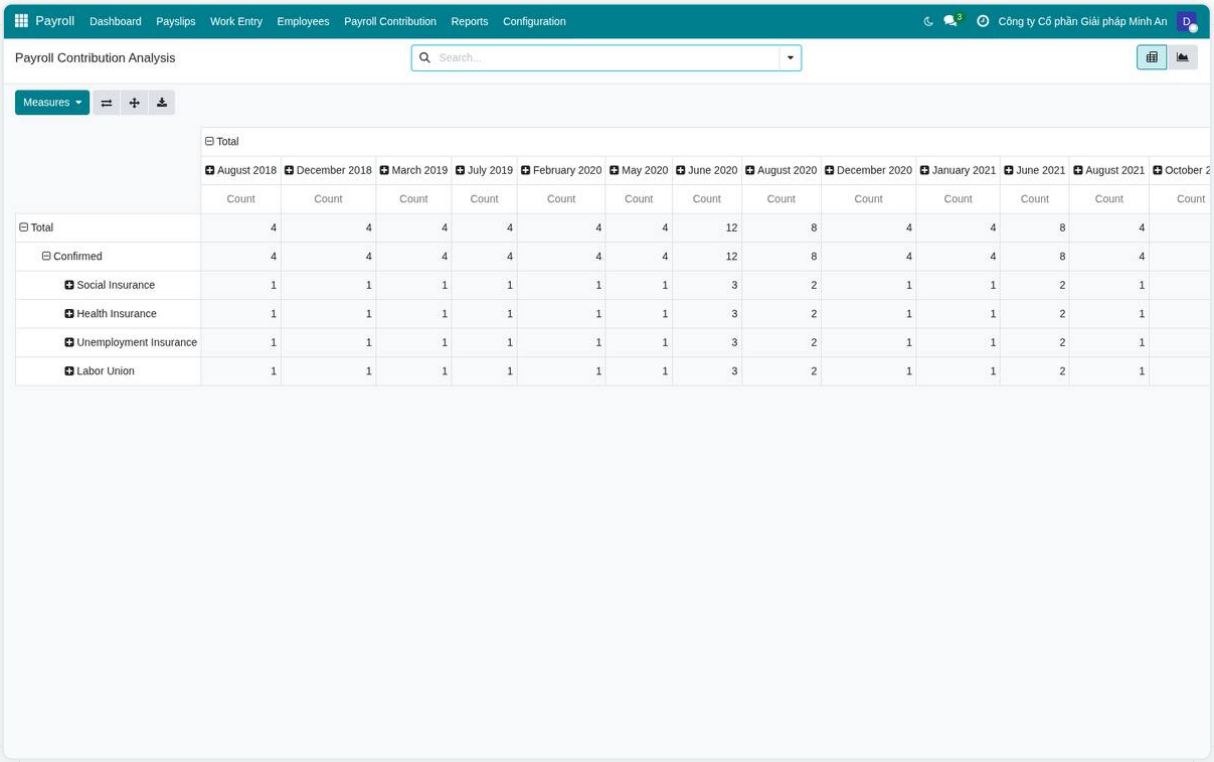
You should see: a pivot table with three filter tags (the first leaves out the summary categories, then "This Year" and "Waiting or Done"), rows for the 5 departments and columns for the months of 2026, each month with two figures, **Company Cost** and **Amount**. The company cost of the whole company for January 2026 is 754,934,270, of which:

Department	Company cost, January 2026
Accounting - HR	104,572,644
Board of Directors	114,081,429
Engineering	238,897,798
Sales	218,018,816
Warehouse and Logistics	79,363,583

Step 2 - Payroll contribution analysis

Open the **Reports** menu and click **Payroll Contribution Analysis**.

> *Path:* `Payroll > Reports > Payroll Contribution Analysis`

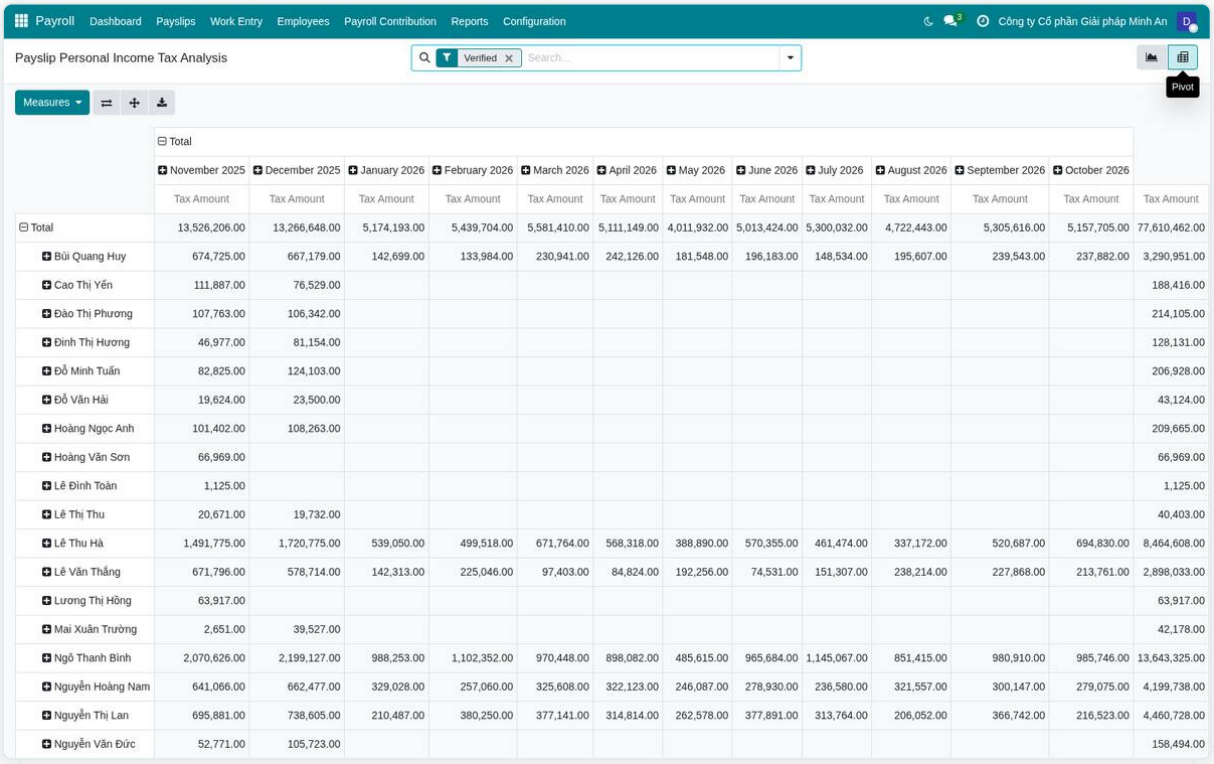


You should see: a pivot table that counts the contribution registration records. The "Confirmed" row splits into four types: Social Insurance, Health Insurance, Unemployment Insurance and Labor Union. The columns are the months in which the registrations start, beginning with August 2018. Every employee has all 4 registrations, 176 registrations in total for 44 records, so each time one employee starts work, every type goes up by 1.

Step 3 - Personal income tax analysis

Open the **Reports** menu, click **Personal Income Tax Analysis**, then click the **Pivot** icon in the top right corner.

> *Path:* `Payroll > Reports > Personal Income Tax Analysis`



	Total	November 2025	December 2025	January 2026	February 2026	March 2026	April 2026	May 2026	June 2026	July 2026	August 2026	September 2026	October 2026
	Tax Amount	Tax Amount	Tax Amount	Tax Amount	Tax Amount	Tax Amount	Tax Amount	Tax Amount	Tax Amount	Tax Amount	Tax Amount	Tax Amount	Tax Amount
Total	77,610,462.00	13,526,206.00	13,266,648.00	5,174,193.00	5,439,704.00	5,581,410.00	5,111,149.00	4,011,932.00	5,013,424.00	5,300,032.00	4,722,443.00	5,305,616.00	5,157,705.00
Bùi Quang Huy	3,290,951.00	674,725.00	667,179.00	142,699.00	133,984.00	230,941.00	242,126.00	181,548.00	196,183.00	148,534.00	195,607.00	239,543.00	237,882.00
Cao Thị Yến	188,416.00	111,887.00	76,529.00										
Đào Thị Phương	214,105.00	107,763.00	106,342.00										
Đinh Thị Hương	128,131.00	46,977.00	81,154.00										
Đỗ Minh Tuấn	206,928.00	82,825.00	124,103.00										
Đỗ Văn Hải	43,124.00	19,624.00	23,500.00										
Hoàng Ngọc Anh	209,665.00	101,402.00	108,263.00										
Hoàng Văn Sơn	66,969.00	66,969.00											
Lê Đình Toàn	1,125.00	1,125.00											
Lê Thị Thu	40,403.00	20,671.00	19,732.00										
Lê Thu Hà	8,464,608.00	1,491,775.00	1,720,775.00	539,050.00	499,518.00	671,764.00	568,318.00	388,890.00	570,355.00	461,474.00	337,172.00	520,687.00	694,830.00
Lê Văn Thắng	2,898,033.00	671,796.00	578,714.00	142,313.00	225,046.00	97,403.00	84,824.00	192,256.00	74,531.00	151,307.00	238,214.00	227,868.00	213,761.00
Lương Thị Hồng	63,917.00	63,917.00											
Mai Xuân Trường	42,178.00	2,651.00	39,527.00										
Ngô Thanh Bình	13,643,325.00	2,070,626.00	2,199,127.00	988,253.00	1,102,352.00	970,448.00	898,082.00	485,615.00	965,684.00	1,145,067.00	851,415.00	980,910.00	985,746.00
Nguyễn Hoàng Nam	4,199,738.00	641,066.00	662,477.00	329,028.00	257,060.00	325,608.00	322,123.00	246,087.00	278,930.00	236,580.00	321,557.00	300,147.00	279,075.00
Nguyễn Thị Lan	4,460,728.00	695,881.00	738,605.00	210,487.00	380,250.00	377,141.00	314,814.00	262,578.00	377,891.00	313,764.00	206,052.00	366,742.00	216,523.00
Nguyễn Văn Đức	158,494.00	52,771.00	105,723.00										

You should see: the filter tag "Verified", one row per employee, columns for the months starting with November 2025, and **Tax Amount** in the cells. The **Total** row reads 13,526,206 for November 2025, 13,266,648 for December 2025 and 5,174,193 for January 2026. The total tax drops sharply from January 2026: the tax brackets of the first lesson change their validity dates at 01/01/2026 (the old brackets run to 31/12/2025, the new ones from 01/01/2026).

Try it: in Step 3 click the **Graph** icon to see the tax by month as stacked columns, then switch back to **Pivot** and expand one employee to see that person's tax by month.

PART VII. RECRUITMENT

This part answers the questions: **which positions is the company hiring for, which round is each candidate in, who was hired, who was refused, and where does a manager see the hiring picture by month?** The HR officer follows the first three lessons. The director reads the analysis lesson. The data is sample data for "Công ty Cổ phần Giải pháp Minh An": 4 positions and 60 applicants over 13 months, of whom 6 were hired and 30 were refused.

The part has three lessons: one to read the positions and the stages, one to move a candidate through the stages, and one to look at the recruitment analysis. The Recruitment app here is the basic one, enough for positions, applicants, stages and analysis. The `demo` account has Recruitment manager rights. Every image was taken on 9 November 2026. The stage-change and refuse actions were not clicked while shooting: the images were taken on an existing applicant record, before clicking. The demo system is reloaded every night, so whatever your company clicks goes back to how it was.

22 READ THE POSITIONS AND THE RECRUITMENT STAGES

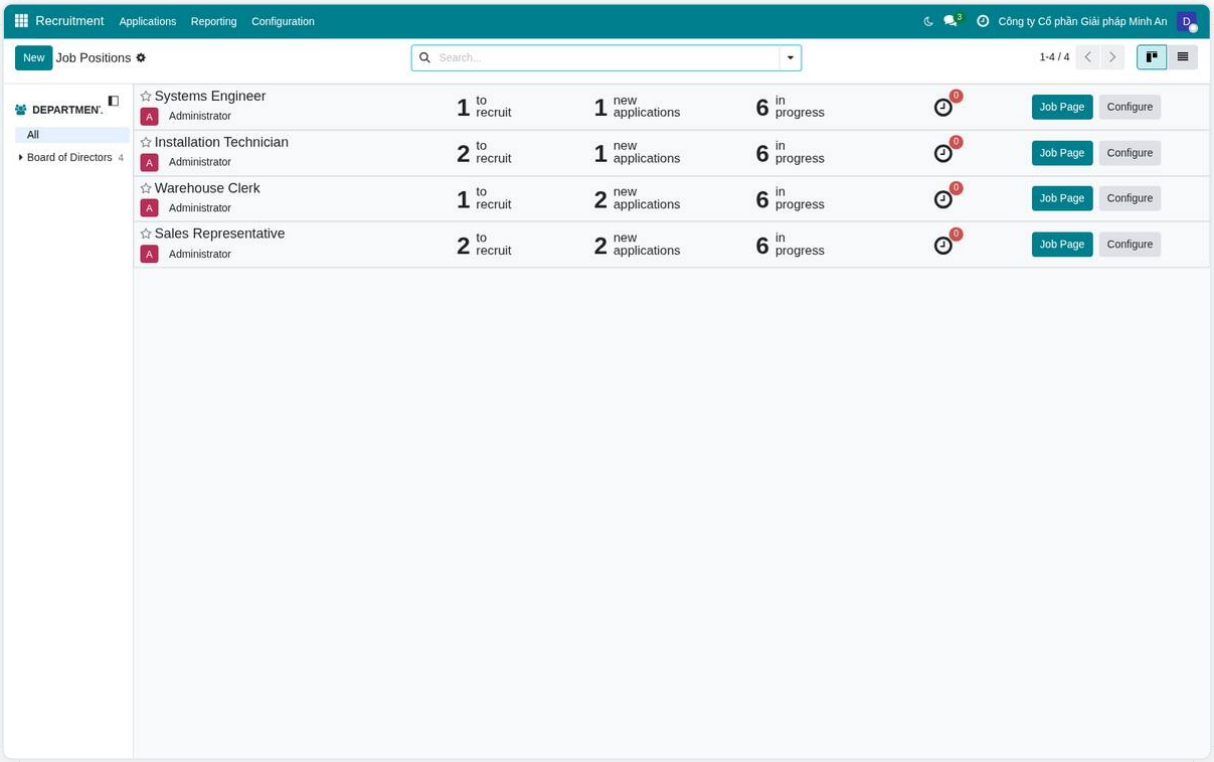
About 10 minutes. By the end of this lesson your company can read the 4 job positions being recruited, open the configuration of one position, see the 6 recruitment stages as 6 columns, and open the edit box of one stage.

Log in with the account `demo` / `demo` as described in the section "How to use this handbook".

Step 1 - Open the list of positions being recruited

Click **Applications** in the menu bar, then click **By Job Positions**.

> *Path:* `Recruitment > Applications > By Job Positions`



You should see: 4 position cards: Systems Engineer, Installation Technician, Warehouse Clerk, Sales Representative. On each card the first large number is the headcount to recruit ("to recruit"), then the number of new applications, then the number of applicants in the stages ("in progress", 6 for every position).

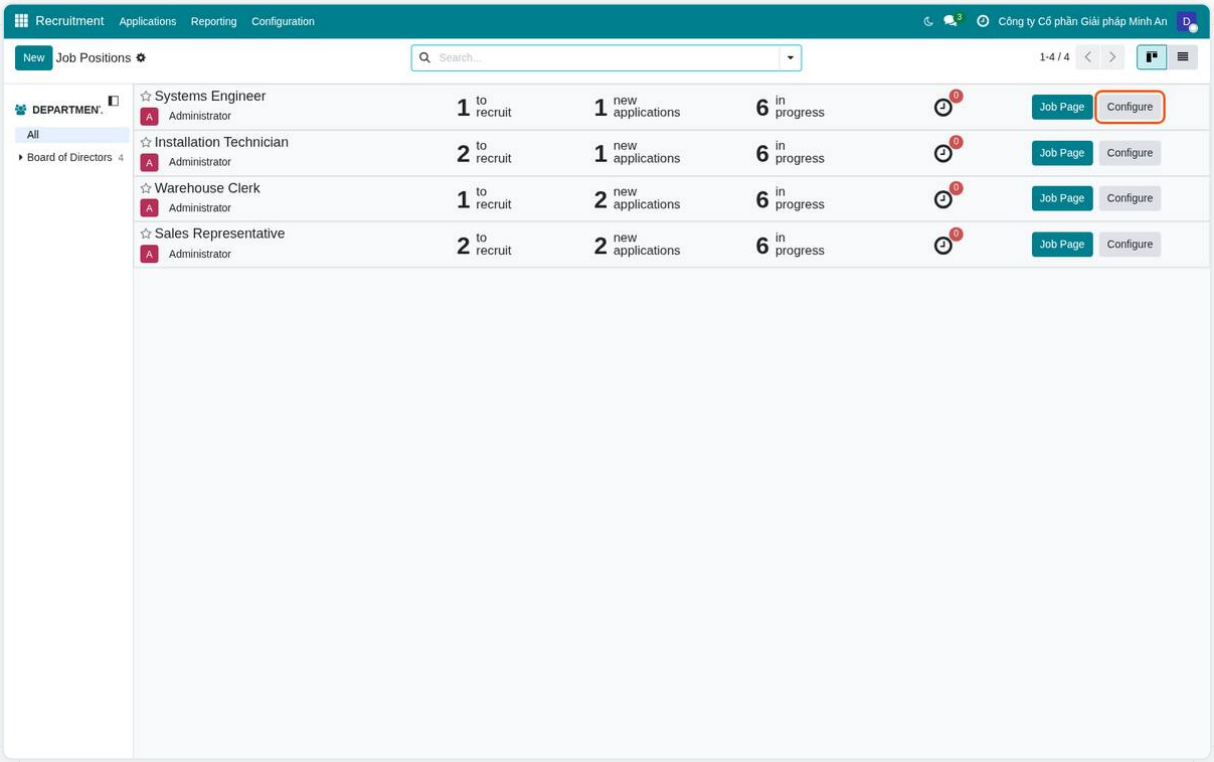
Position	Headcount to recruit
Systems Engineer	1
Installation Technician	2
Sales Representative	2
Warehouse Clerk	1

The **Job Page** button on a card is for the public website; this lesson does not use it.

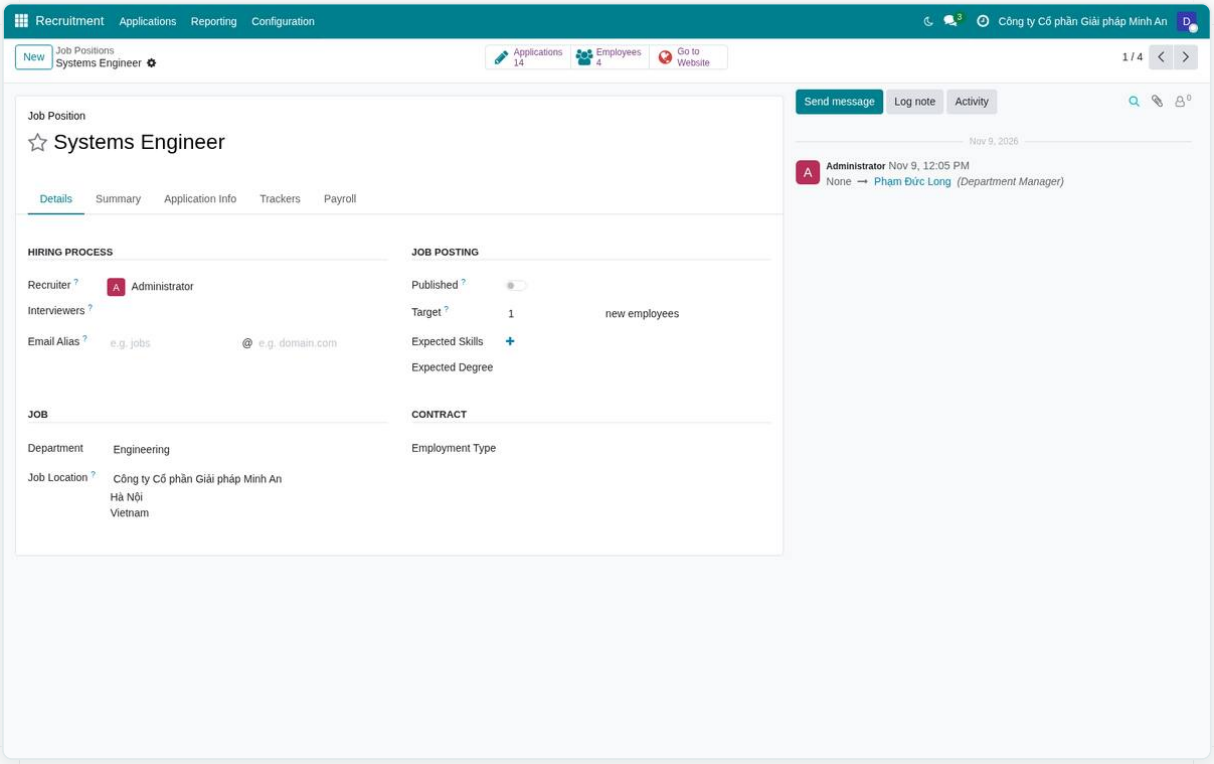
Step 2 - Open the configuration of one position

On the **Systems Engineer** card, click the **Configure** button.

> *Path:* `Recruitment > Applications > By Job Positions` , the **Systems Engineer** card, **Configure** button



You should see: the **Configure** button on the Systems Engineer card is ringed in orange. After you click it, the system opens the position form:

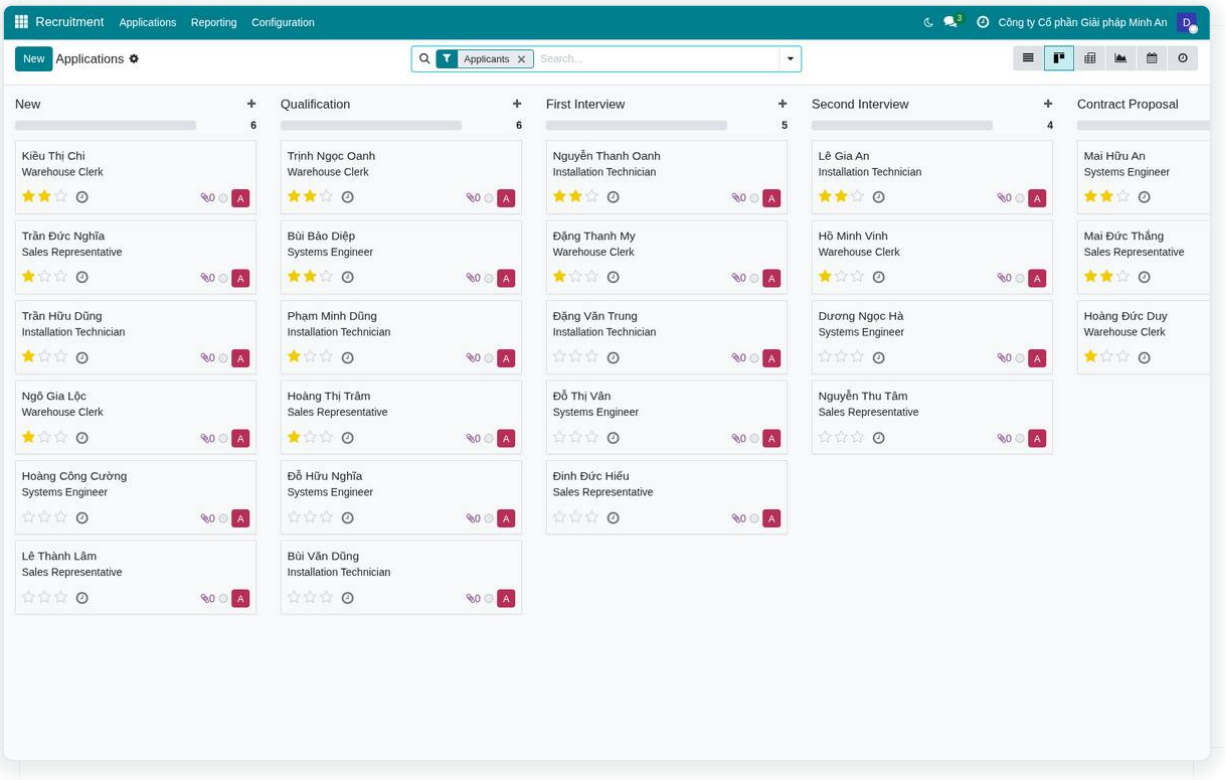


The form shows **Recruiter** as Administrator, **Target** as 1 new employee, **Department** as Engineering and **Job Location** as Công ty Cổ phần Giải pháp Minh An in Hà Nội. The statistics buttons at the top show 14 applications and 4 employees for this position; the third button leads to the public website page. Your company only reads here and does not click Save.

Step 3 - See the recruitment stages

Click **Applications** in the menu bar, click **All Applications**, then click the **Kanban** icon in the top right corner.

> *Path:* `Recruitment > Applications > All Applications` , **Kanban** icon



You should see: each column is a stage and each card is an applicant. The number at the top of a column is the number of applicants in that stage.

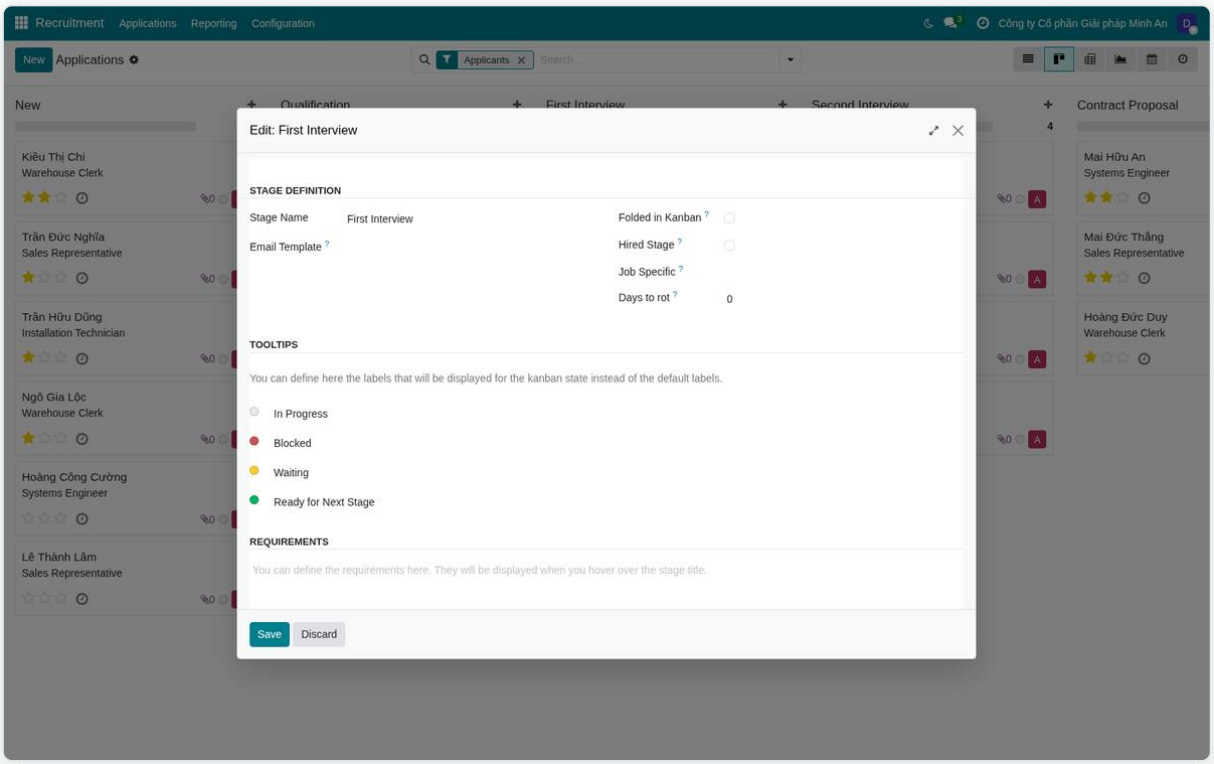
Stage	Applicants
New	6
Qualification	6
First Interview	5
Second Interview	4
Contract Proposal	3
Contract Signed	6

The default filter tag "Applicants" shows only applicants that are open or hired, so there are no refused applicants.

Step 4 - Open the edit box of one stage

Hover over the column name **First Interview**, click the gear icon that appears, then click **Edit**.

> *Path:* `Recruitment > Applications > All Applications` , column **First Interview**, gear icon, **Edit** item



You should see: the box "Edit: First Interview" has the **Stage Name** field, **Email Template**, the **Folded in Kanban** and **Hired Stage** tick boxes, the **Days to rot** field, the four colored labels of the kanban state, and the two buttons **Save** and **Discard**. To rename a stage, your company edits the **Stage Name** field in this box. Click **Discard** to close without changing anything. The gear menu also has **Fold** and **Delete**; do not click **Delete**, because the stage would be lost.

Try it: in Step 4 open the edit box of the stage "Contract Signed" and see whether the **Hired Stage** box is ticked, then click **Discard**.

23 MOVE A CANDIDATE THROUGH THE STAGES

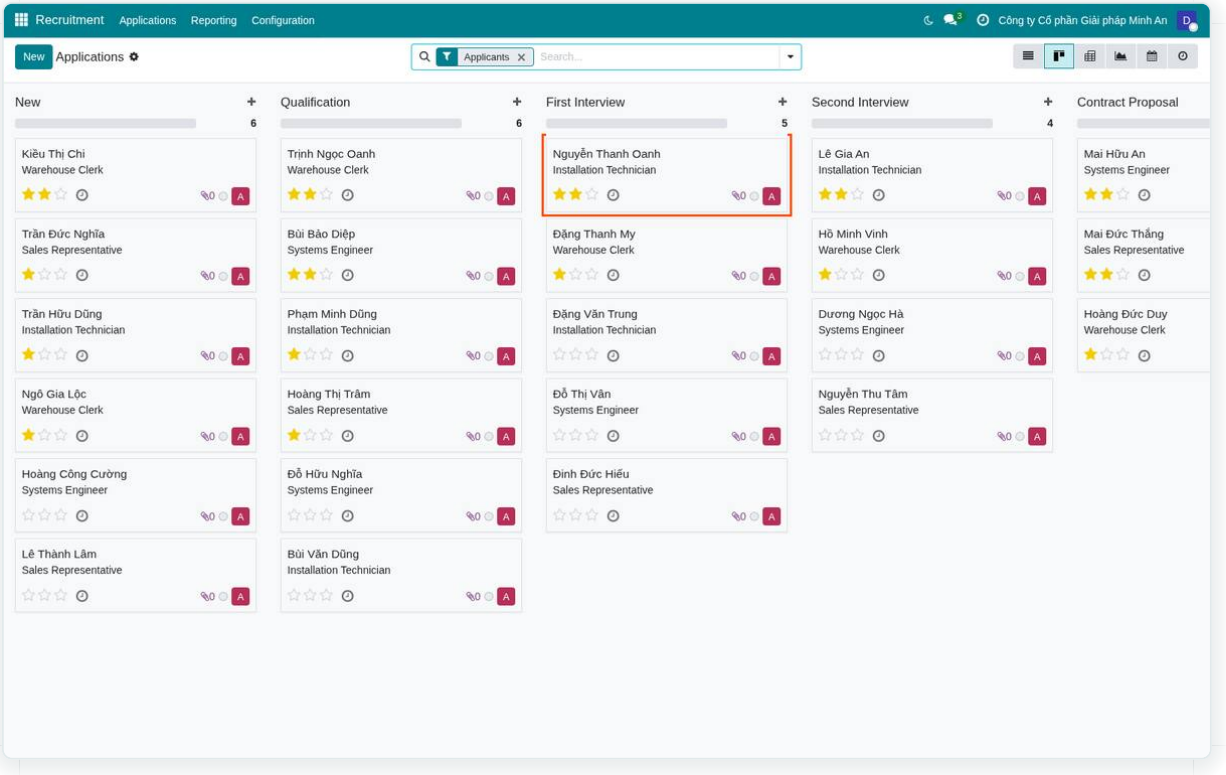
About 10 minutes. By the end of this lesson your company has opened the record of a candidate in an interview stage, read the stage bar, pointed out the button that moves the candidate to the next stage, opened the refuse box with its list of reasons, and looked at the 6 candidates who were hired.

The lesson uses the sample candidate "Nguyễn Thanh Oanh" (position Installation Technician, now at First Interview). So that the data does not change, every image was taken before clicking a stage change or a refusal.

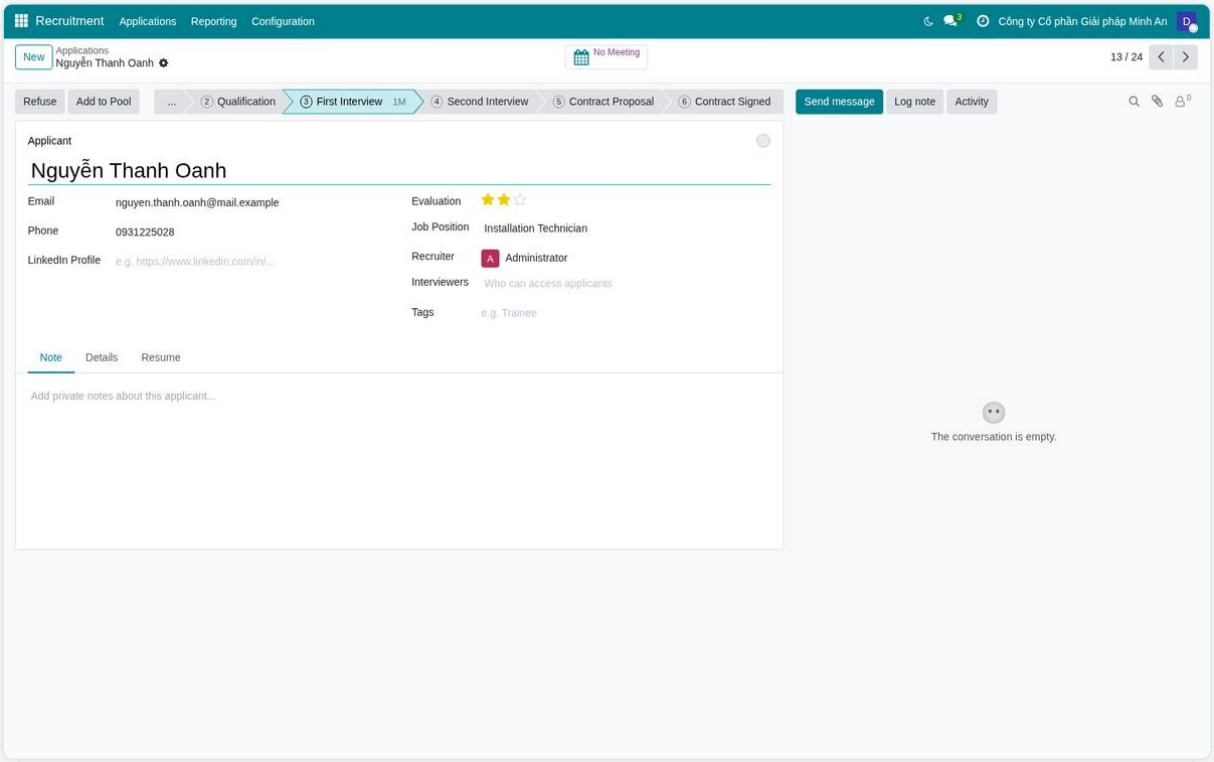
Step 1 - Find the candidate on the kanban board

On the applications kanban board, find the card **Nguyễn Thanh Oanh** in the **First Interview** column and click the card.

> *Path:* `Recruitment > Applications > All Applications` , **Kanban** icon



You should see: the ringed card shows the name, the position "Installation Technician" and two rating stars. After you click it, the system opens the applicant record:

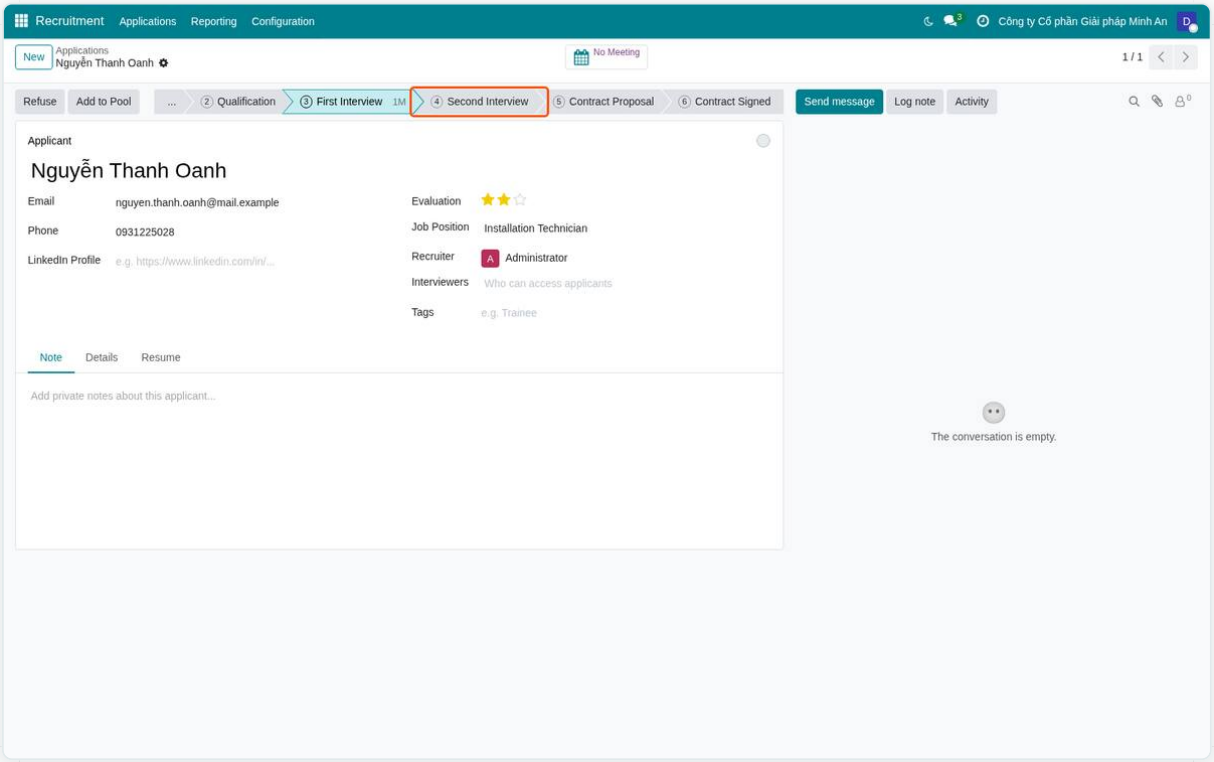


The record has **Email**, **Phone**, a two-star **Evaluation**, **Job Position** Installation Technician and **Recruiter** Administrator; above it are the two buttons **Refuse** and **Add to Pool**.

Step 2 - Read the stage bar and choose the next stage

Look at the stage bar at the top of the record, then click the stage name **Second Interview** to move the candidate to that stage.

> *Path:* `Recruitment > Applications > All Applications` , record **Nguyễn Thanh Oanh**, stage bar

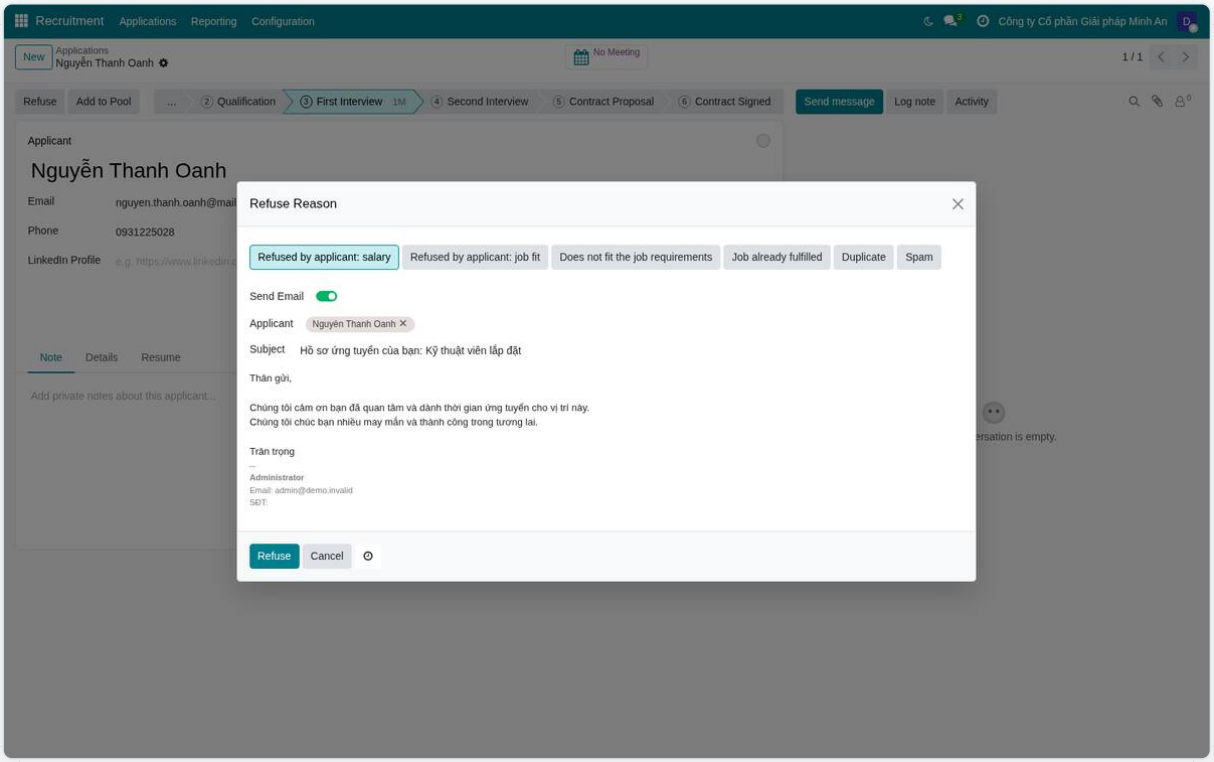


You should see: the stage bar reads "Qualification", "First Interview" (highlighted, with "1M" showing that the candidate has been in this stage for one month) and "Second Interview" ringed. The image was taken before clicking. When your company clicks another stage name, the highlighted step moves to that stage, and the candidate also moves to the matching column of the kanban board.

Step 3 - Refuse a candidate with a reason

Click the **Refuse** button in the top left corner of the record.

> *Path:* `Recruitment > Applications > All Applications` , record **Nguyễn Thanh Oanh**, **Refuse** button

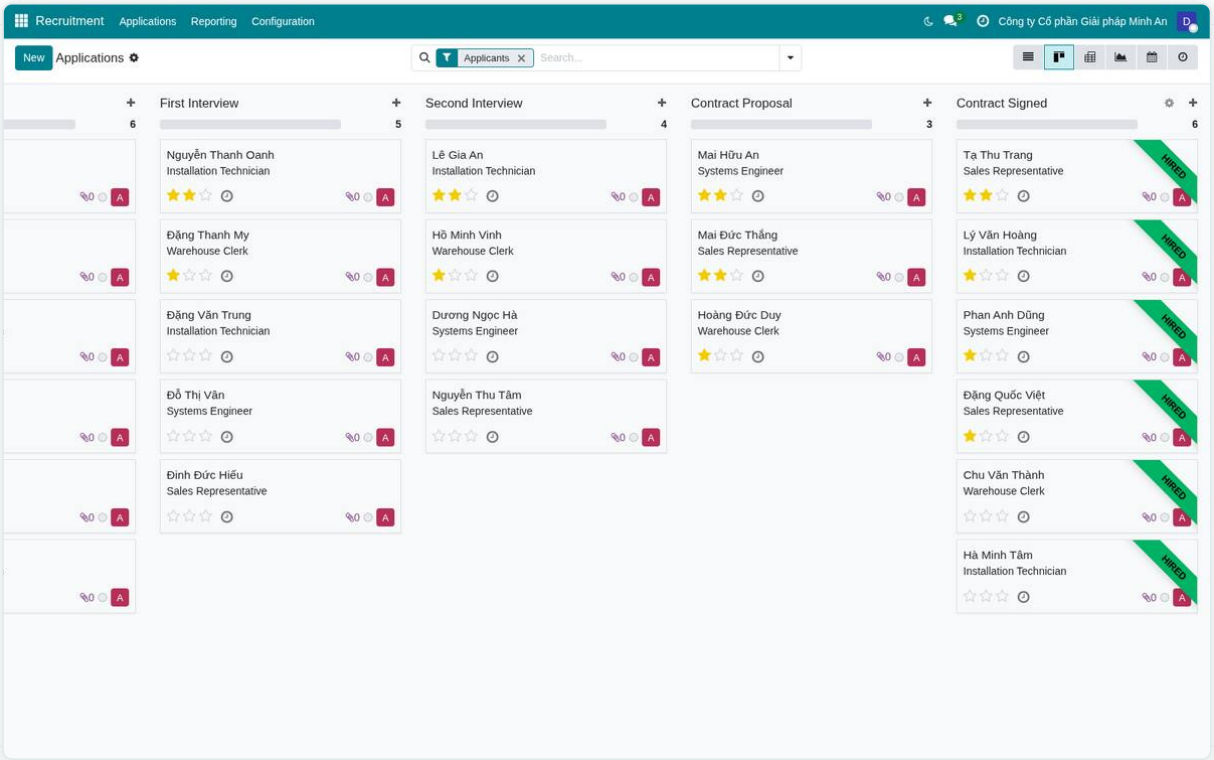


You should see: the box "Refuse Reason" lists 6 reasons as buttons: "Refused by applicant: salary", "Refused by applicant: job fit", "Does not fit the job requirements", "Job already fulfilled", "Duplicate", "Spam". Below are the **Send Email** switch (turned on), the applicant, the **Subject** of the email and the sample message (the subject and message text are stored in Vietnamese); the **Refuse** button confirms and the **Cancel** button closes the box. To avoid sending an email to the candidate, turn off the **Send Email** switch. The image was taken before confirming.

Step 4 - See the candidates who were hired

Go back to the applications kanban board and click the column name **Contract Signed** to open that column.

> *Path:* `Recruitment > Applications > All Applications` , **Kanban** icon, column **Contract Signed**



You should see: the **Contract Signed** column has 6 cards, each with a green "HIRED" ribbon: Tạ Thu Trang, Lý Văn Hoàng, Phan Anh Dũng, Đặng Quốc Việt, Chu Văn Thành, Hà Minh Tâm. These six people are also the 6 employees who joined during the data period, so they have records in the Employees app (see the Employees part).

Try it: open the record of one applicant in the "Contract Proposal" column and read which stage comes before and which comes after it on the stage bar; then open the **Refuse** box on that record and close it with **Cancel**.

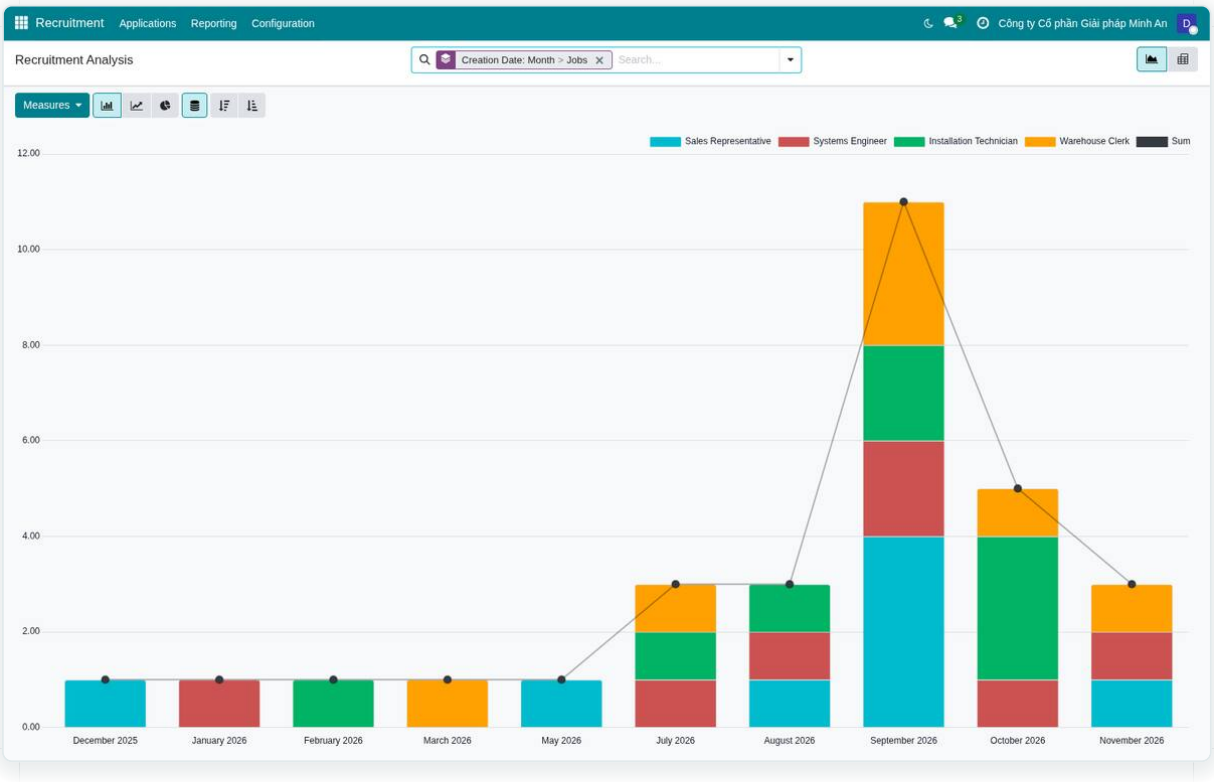
24 LOOK AT THE RECRUITMENT ANALYSIS

About 5 minutes. By the end of this lesson your company has opened the recruitment analysis report, read the number of applications by month and by position, and knows the extra filter that also shows refused candidates.

Step 1 - Open the recruitment analysis report

Click **Reporting** in the menu bar, then click **Recruitment Analysis**.

> *Path:* `Recruitment > Reporting > Recruitment Analysis`

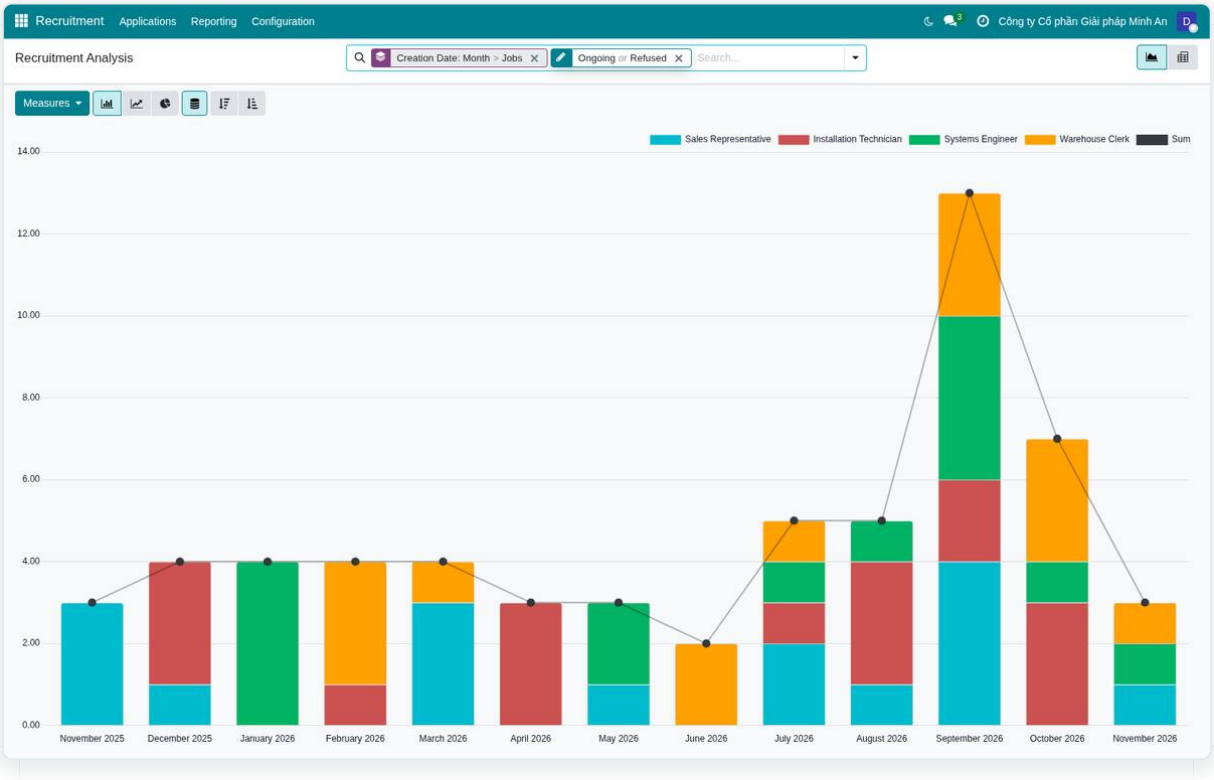


You should see: a stacked bar chart grouped by **Creation Date: Month** and then **Jobs**, with each month showing columns colored by the 4 positions. By default the chart counts only open and hired applicants (30 applications), so some months have no column because in those months every applicant was refused.

Step 2 - Add the refused candidates to the report

Open the filter box at the end of the search box and choose **Ongoing** and **Refused** in the list of filters.

> *Path:* `Recruitment > Reporting > Recruitment Analysis`



You should see: the filter tag changes to "Ongoing or Refused" and the chart has all 13 months from November 2025 to November 2026; adding up the columns gives 60 applications. September 2026 is the highest with 13 applications and June 2026 the lowest with 2. You can switch to a pivot table with the icon in the top right corner.

Try it: in Step 2 click the legend entry "Warehouse Clerk" to hide one position and see how the other months change.

PART VIII. OKR

This part answers the questions: each quarter, which objectives does your company set, which key results measure each objective, who is responsible, and how much has been achieved so far. Directors and department heads read this part first. An OKR consists of an Objective and the Key Results that measure it; in the system both are an "OKR node" in the same list, and a key result is a child node of its parent objective. The data spans 5 quarters from Q4 2025 to Q4 2026; each quarter has 3 company objectives, and each company objective is picked up by departments through their own department objectives.

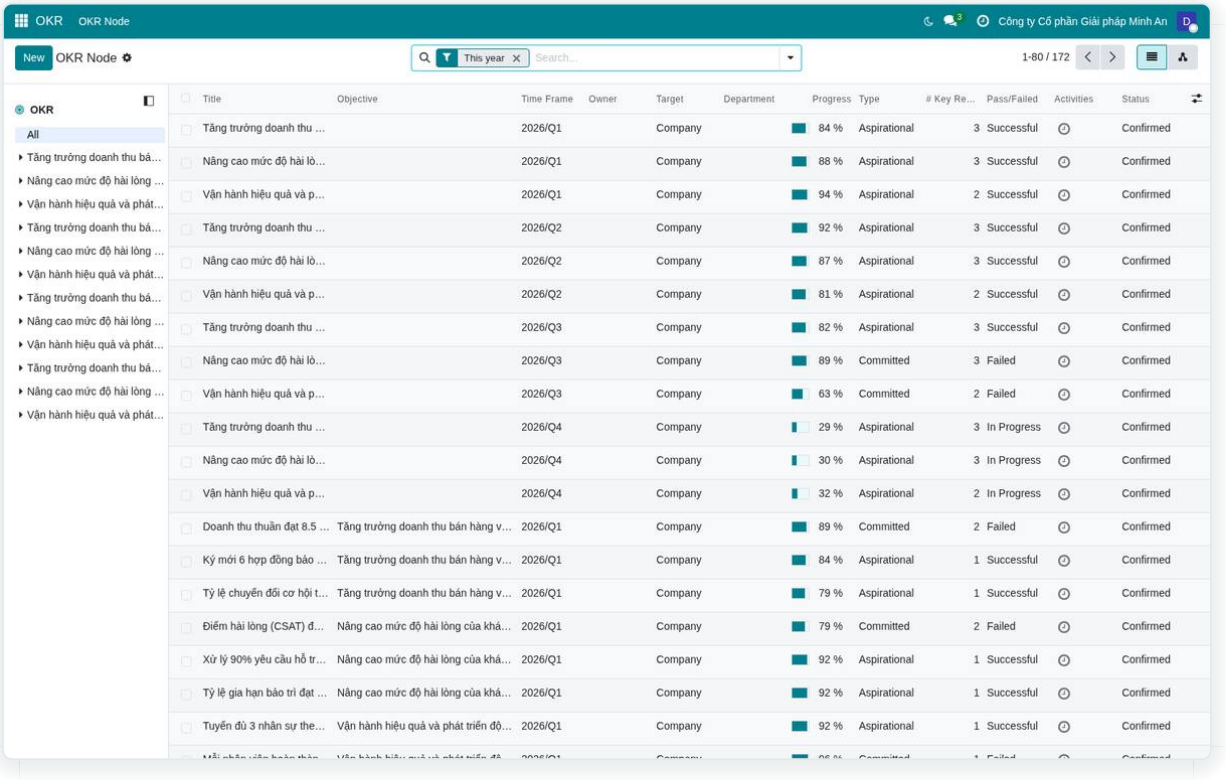
25 CREATE AN OBJECTIVE

About 10 minutes. By the end of this lesson your company can view the list of existing objectives and create a new objective for the current quarter. The image of the new objective was taken after filling in the form but before saving, so that the sample data is not changed.

Step 1 - View the list of objectives

Click the **OKR** app; the first screen is the **OKR Node** list.

> *Path:* `OKR > OKR Node`

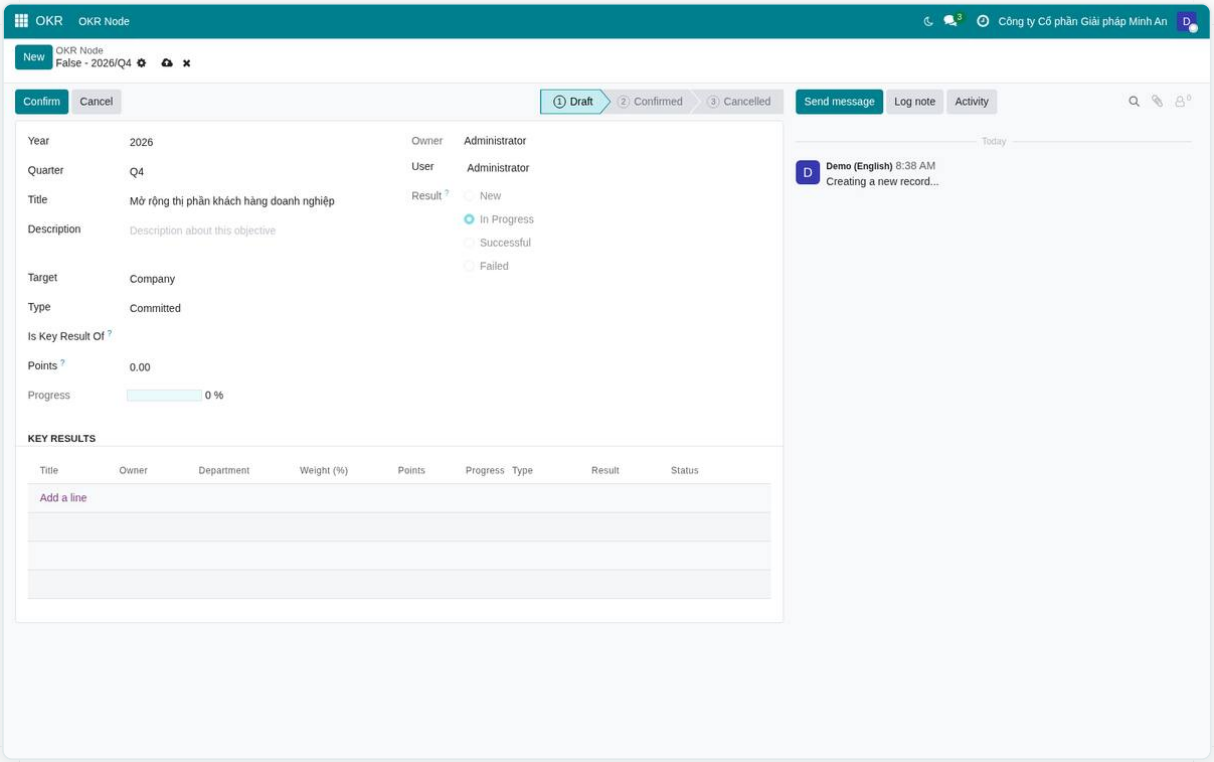


You should see: the list is filtered by **This year** by default, with 172 rows spread over several pages. Each row has a title, a time frame such as 2026/Q1, progress shown as a colored bar and a percentage, a **Type** that is **Aspirational** or **Committed**, and a **Status** of **Confirmed**. The left column is a filter tree by company objective.

Step 2 - Create a new objective

Click **New** in the top left corner and type the name of the objective in the **Title** field, for example **Mở rộng thị phần khách hàng doanh nghiệp** (expand the market share among business customers).

> *Path:* `OKR > OKR Node` , **New** button



You should see: the status bar at **Draft**; **Year** is 2026 and **Quarter** is Q4, filled in by the system from today's date; **Target** is preselected as **Company** and **Type** is **Committed**. At the top of the form are the **Confirm** and **Cancel** buttons. The **Key Results** section below is still empty and has an **Add a line** link. The title line at the top temporarily reads "False - 2026/Q4" until you save.

Try it: create an objective for the current quarter in your company's own words; change the **Target** field from **Company** to **Department** if you want to assign it to one department.

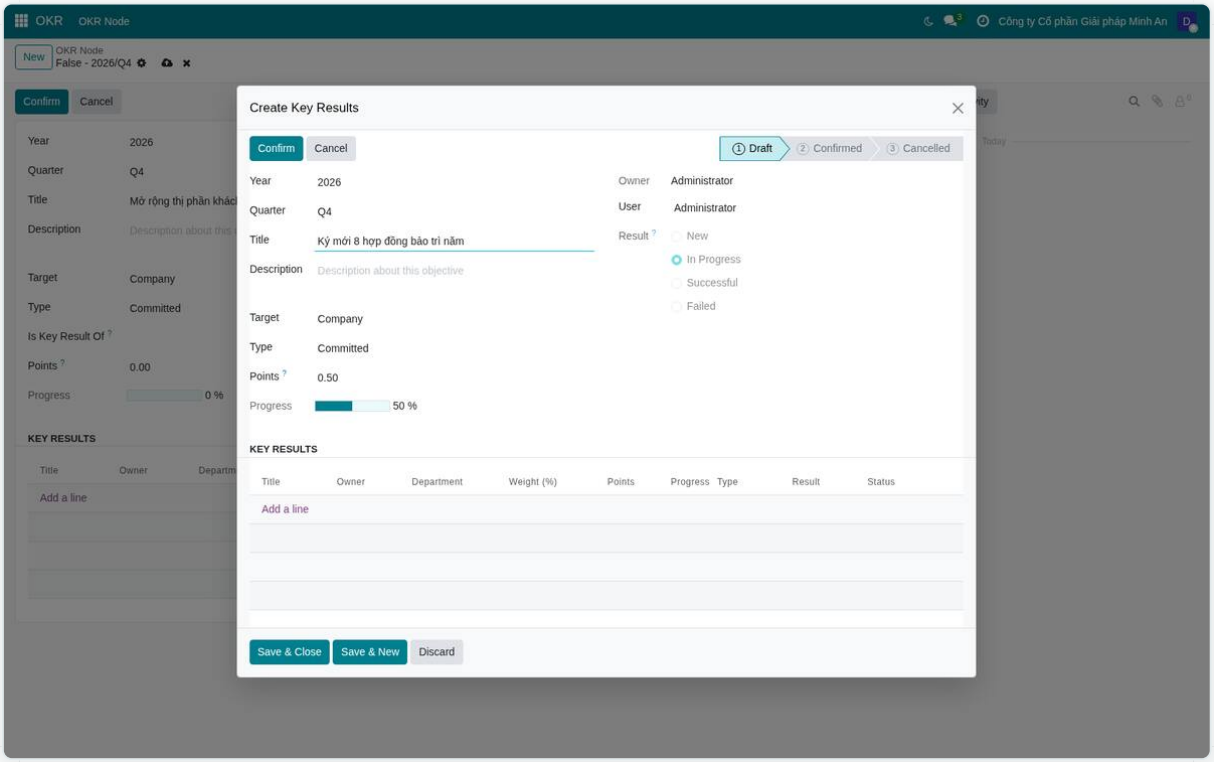
26 KEY RESULTS AND UPDATING THE POINTS

About 15 minutes. By the end of this lesson your company can add a key result to an objective, confirm the objective to start tracking it, and update the points so that the progress changes with them. The confirm step was shot on an objective that was already confirmed; the point-update step was shot on a running key result, without editing the points of the sample data.

Step 1 - Add a key result

In the new objective form, in the **Key Results** section click **Add a line**, type the name of the result in the **Title** field, for example **Ký mới 8 hợp đồng bảo trì năm** (sign 8 new annual maintenance contracts), and type **Points** as 0.5.

> *Path:* `OKR > OKR Node` , **New** button, **Key Results** section, **Add a line** link

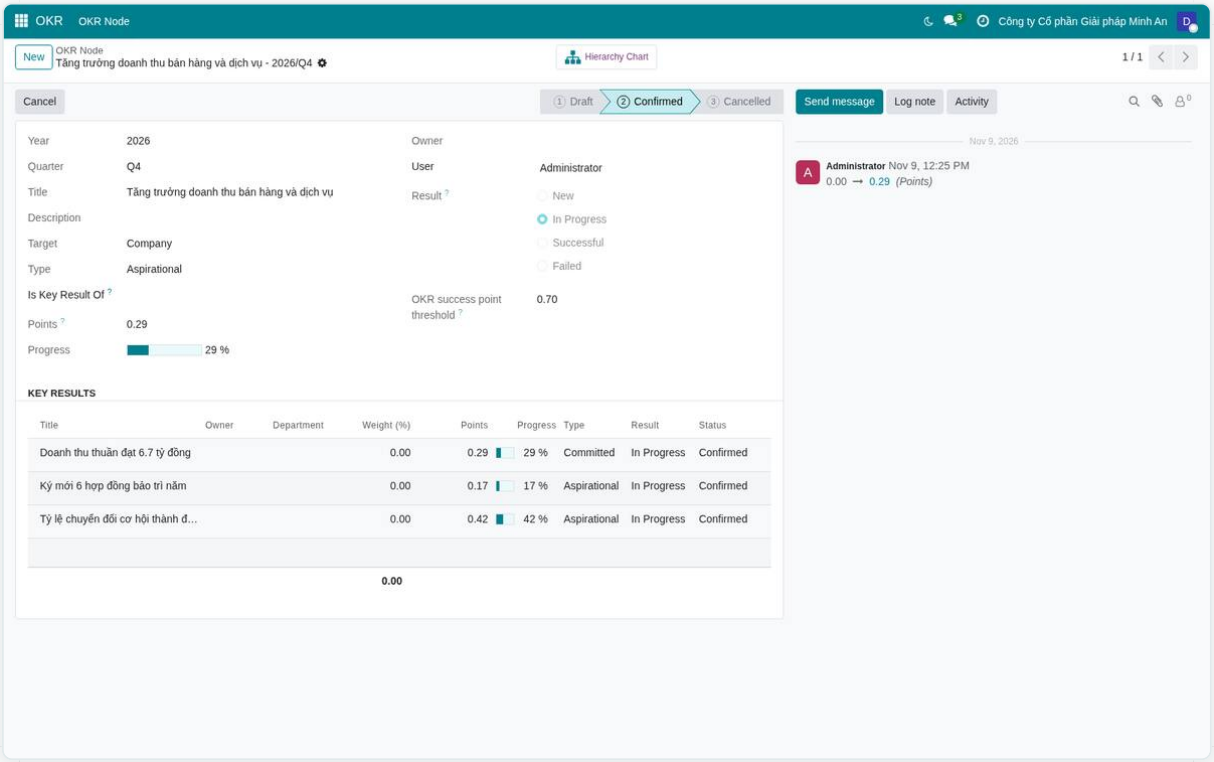


You should see: the **Create Key Results** window opens in the middle of the screen, with the **Title** you typed, **Points** of 0.50 and the **Progress** bar showing 50 %, and **Result** set to **In Progress**. At the bottom of the window are three buttons: **Save & Close**, **Save & New** and **Discard**. Points are typed as a decimal number: 0.5 is 50 % and 1 is 100 %.

Step 2 - Confirm the objective

When the objective and its key results are complete, click **Confirm** at the top of the form. The image was taken on a Q4 objective that was already confirmed: **Tăng trưởng doanh thu bán hàng và dịch vụ** (growth of sales and service revenue).

> *Path:* `OKR > OKR Node` , open the objective, **Confirm** button

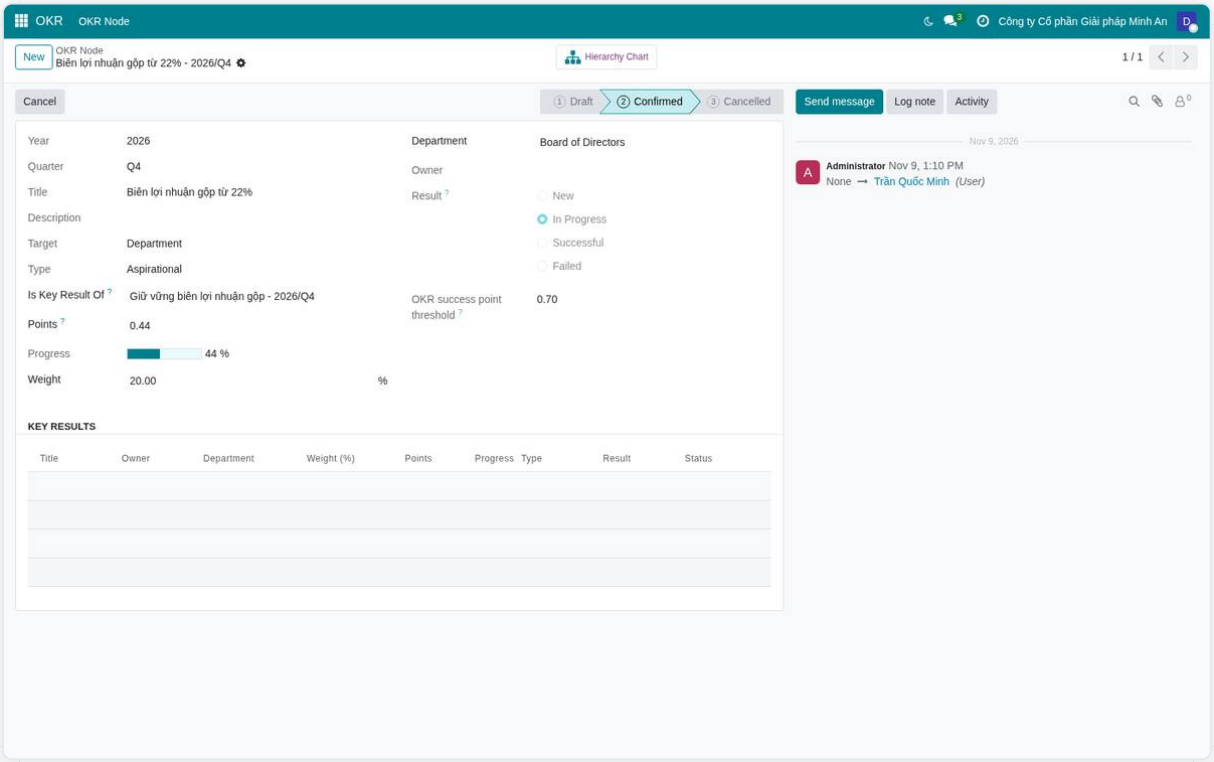


You should see: the status bar is lit at **Confirmed**; only the **Cancel** button is left at the top of the form. The objective has **Points** of 0.29 and **Progress** of 29 %. The **Key Results** table lists three rows with points of 0.29, 0.17 and 0.42; the points of the objective are the average of these three rows. The **Hierarchy Chart** button at the top of the form opens the OKR tree.

Step 3 - Update the points of a key result

Open a running key result and edit the **Points** field to the level reached. The image was taken on the key result **Biên lợi nhuận gộp từ 22%** (gross margin of at least 22%) of the Board of Directors department.

> *Path:* `OKR > OKR Node` , open the key result, **Points** field



You should see: Points 0.44 and a **Progress** bar of 44 %; **Department** is Board of Directors; **Is Key Result Of** shows the parent objective **Giữ vững biên lợi nhuận gộp** (keep the gross margin steady); **Weight** is 20.00 %; **Result** is **In Progress**. The **Points** field can be edited directly because this key result has no child nodes; for an objective that has key results below it, the points are calculated automatically, so that field is locked.

Try it: add three key results to the objective you created in the previous lesson, set 0.3 points on one of them, and watch the **Progress** of the objective change with it.

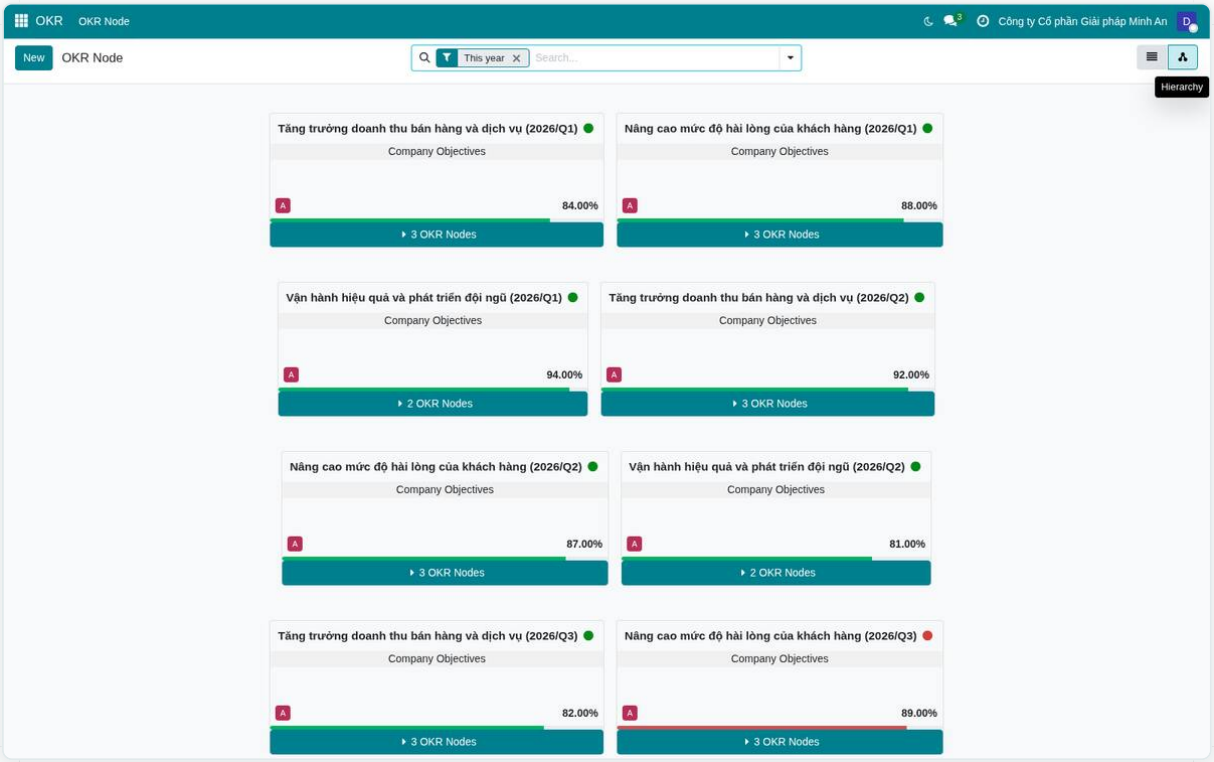
27 THE OKR TREE BY QUARTER

About 10 minutes. By the end of this lesson your company can see all the company's OKRs quarter by quarter, then walk down from a company objective to its key results and to each department's objectives, to know who is pulling the progress.

Step 1 - Open the OKR tree for the whole year

On the list of objectives, click the second button in the top right corner, whose tooltip is **Hierarchy**.

> *Path:* `OKR > OKR Node` , **Hierarchy** button in the top right corner

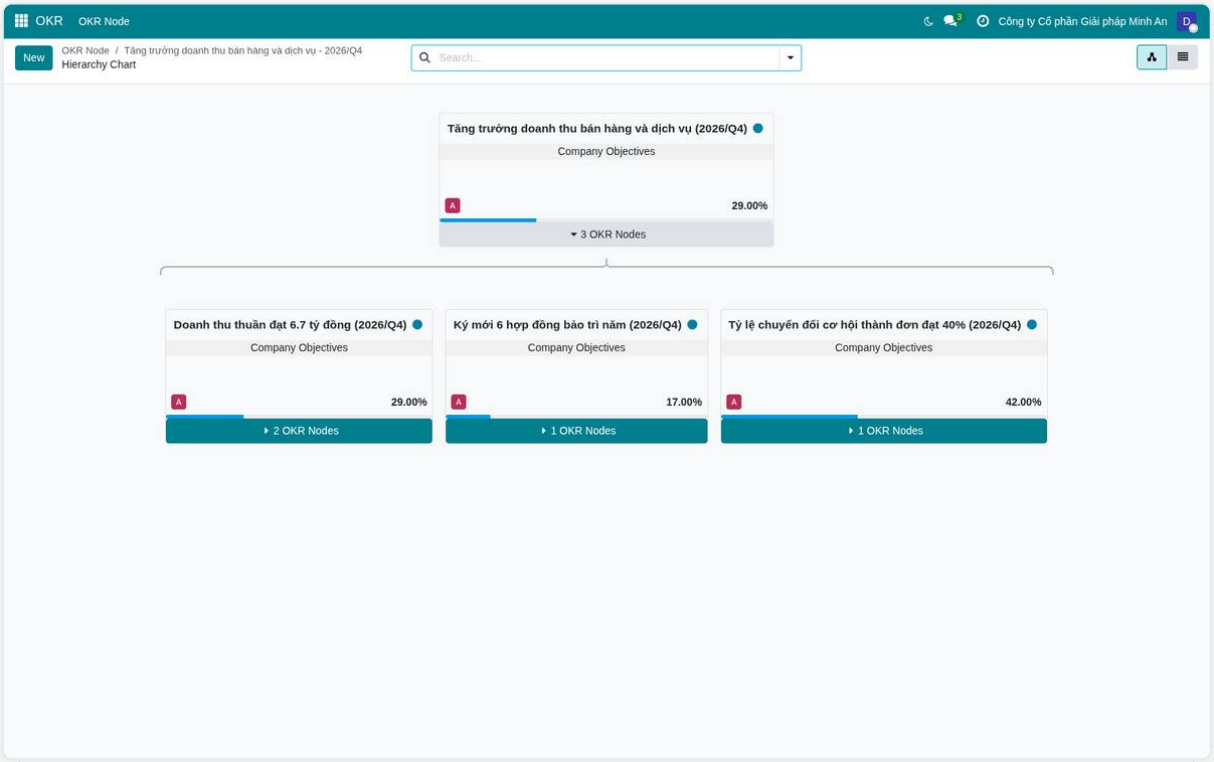


You should see: the company objective cards arranged by quarter, starting with 2026/Q1; scroll down to see 2026/Q2, 2026/Q3 and 2026/Q4, with three cards for each quarter. Each card has the objective name, the progress percentage, a colored bar and a button that shows the number of child nodes. The colored dot beside the name shows the result: green is successful, red is failed, blue is in progress. For example, the Q3 objective **Nâng cao mức độ hài lòng của khách hàng** (raise customer satisfaction) has a red dot.

Step 2 - Open the hierarchy chart of one objective

Open the Q4 objective **Tăng trưởng doanh thu bán hàng và dịch vụ** and click **Hierarchy Chart**.

> *Path:* `OKR > OKR Node` , open the objective, **Hierarchy Chart** button at the top of the form

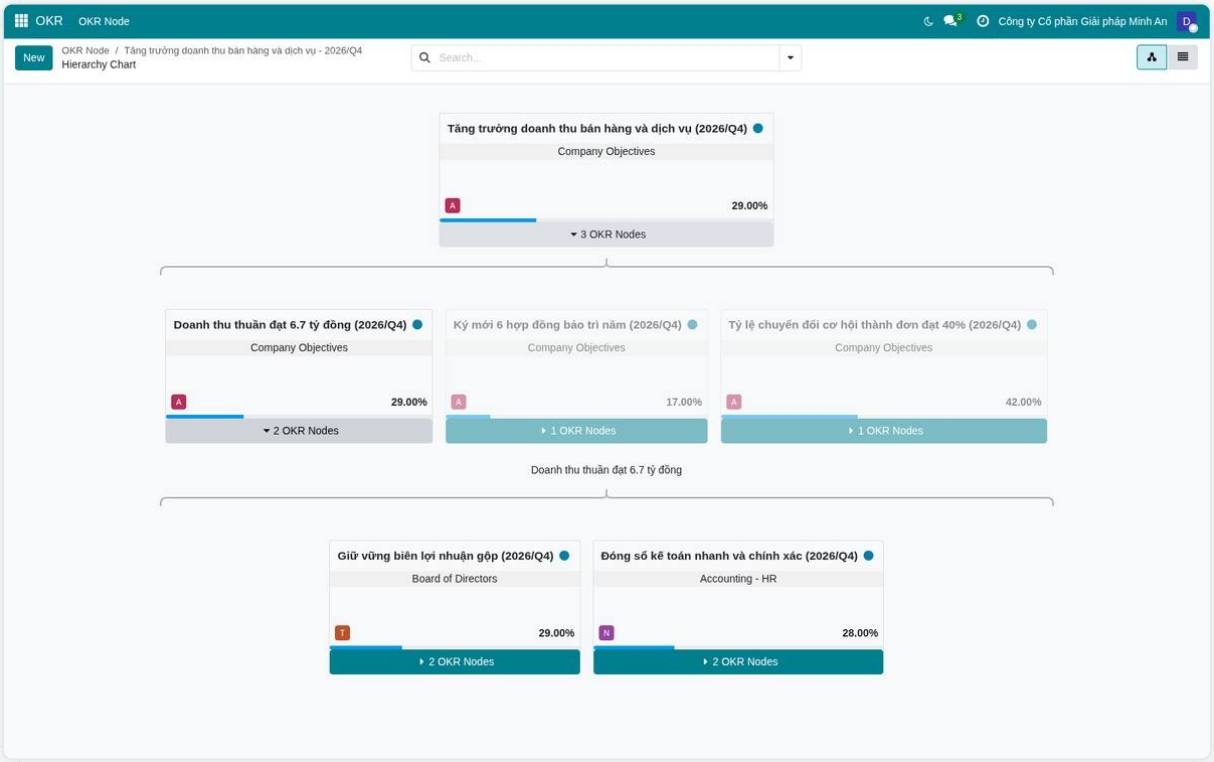


You should see: the company objective at the top with progress of 29%, and below it three key results side by side: **Doanh thu thuần đạt 6.7 tỷ đồng** (net revenue reaches 6.7 billion VND) 29%, **Ký mới 6 hợp đồng bảo trì năm** (sign 6 new annual maintenance contracts) 17% and **Tỷ lệ chuyển đổi cơ hội thành đơn đạt 40%** (opportunity-to-order conversion rate reaches 40%) 42%.

Step 3 - Expand down to the department objectives

Click the **2 OKR Nodes** button on the card **Doanh thu thuần đạt 6.7 tỷ đồng**.

> *Path:* `OKR > OKR Node` , open the objective, **Hierarchy Chart** button, the **2 OKR Nodes** button of the key result



You should see: two more department objectives appear under the card you clicked: **Giữ vững biên lợi nhuận gộp** (keep the gross margin steady) of Board of Directors, progress 29%, and **Đóng sổ kế toán nhanh và chính xác** (close the books quickly and accurately) of Accounting - HR, progress 28%. The other two key result cards fade out so that the eye stays on the open branch. The points of the company key result are calculated automatically from the department objectives below it.

Try it: open the hierarchy chart of a Q1 objective and compare it with Q4 to see that the finalized points differ from the points still running.

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