ODOO-BASED COMPREHENSIVE BUSINESS SOLUTIONS

Bac Ha Software Co., Ltd.

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BHSOFT

Enterprise Resource Planning (ERP)

OUR CAPABILITIES

BHSOFT

EMPLOYEE MANAGEMENT

WEBSITE MANAGEMENT

KNOWLEDGE BASE MANAGEMENT

SYSTEM INTEGRATION

CUSTOMER RELATIONSHIP MANAGEMENT (CRM)

EXPENSE TRACKING

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01. Employee Management

✓ Complete departmental information management

✓ Organizational chart of departments and personnel

✓ Employee department transfer tracking

✓ Detailed employee information management

✓ Employee contract management

EMPLOYEES

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01. Employee Management

- ✓ Access employee contract history

- ✓ Generate employee skills statistics

- ✓ Generate certification statistics

- ✓ Support contract classification

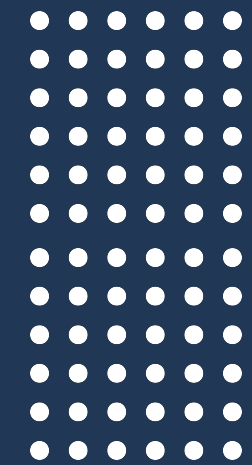- ✓ Offer employee work schedule management

EMPLOYEES

01. Employee Management

- Manage employee documents with expiration alerts

- Manage resignation process

- Track employee department transfers

- Track intern-to-employee promotions

- Configure access levels to protect private information

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02. Attendances

Manage attendance information for each employee

- Edit check-in/check-out date and time
- View check-in/check-out coordinates
- View employee check-in/check-out location on a map
- View total working hours (within working hours)
- View total overtime hours (outside working hours)
- Assign attendance managers to edit data for their team

Capture additional check-in details: company, home, etc.

Record employee tardiness in minutes

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02. Attendances

📍 Check-in at Company

- ○ Enable check-in only when the user's IP is on the whitelist, configurable per user.

➡ Automatically check out at the end of working hours

- ○ Send notifications for missing hours based on each employee's work schedule (via Slack, mobile app, etc.).
- ○ Notify when overtime is recorded, prompting a re-log of time.

02. Attendances

- Notify tardiness with minutes for late check-ins

- Generate employee timesheets in Excel format

- Generate reports on total tardy hours for employees

- Enable approval of overtime hours

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**03.
Time off**

- ✓ Manage employee time-off information

- ✓ Manage time-off requests pending approval by department

- ✓ Manage employee time-off allocations by department

- ✓ Manage time-off type configurations, including adding codes for employee payroll and automatically assign HR managers to track time-off requests upon creation

- ✓ Configure statutory holiday dates

- ✓ Configure automatic annual leave allocation based on employee contract duration.

04. Approvals

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✓ Manage and approve employee requests

  ○ Approve new issuance, borrowing, or return of equipment

  ○ Approve allocation or retrieval of online resources

  ○ Automatically generate tasks for resource allocation

  ○ Approve remote work requests

  ○ Add followers to approval requests

  ○ Notify them when a request is created, approved, or denied

✓ Configure approval request types

✓ Display additional date fields on the approval request list screen

✓ Assigned approvers can cancel requests
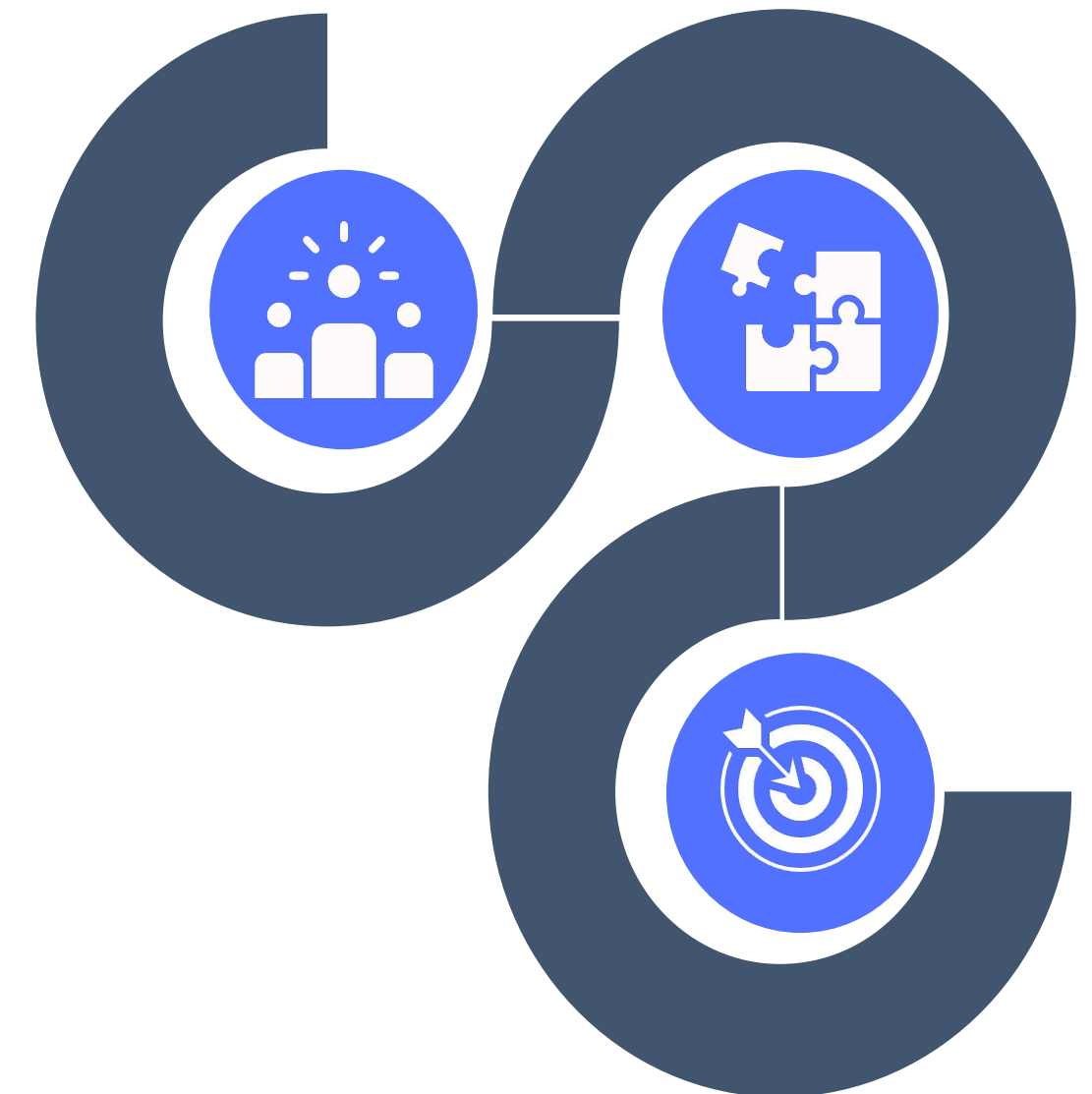
05. Meeting Schedule

- ✅ Manage meeting schedules
    - ○ Support visual display on both calendar and list interfaces
    - ○ Send calendar reminders
    - ○ Add meeting links (Odoo Meeting)
    - ○ Enable creation of recurring meetings
- ✅ Sync meeting schedules between Odoo and Google Calendar or Outlook

06. Appraisals

✅ Generate bulk employee appraisal forms

  ○ HR creates employee appraisal cycles for the entire company

✅ Manage the creation of employee appraisal goals (KPIs)

✅ Manage the creation of employee appraisal forms

✅ Create survey templates

  ○ Input cross-departmental evaluation data into appraisal forms

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06. Appraisals

- ✅ Configure employee appraisal structure by department

- ✅ Automatically fetch appraisal criteria
  - Working hours, break hours, number of late arrivals, minutes of tardiness, bug-fix hours, etc. based on the configurations

- ✅ Save each appraisal edit as a PDF and attach it to the appraisal form

- ✅ Display on both manager and individual screens
  - Number of days late and total minutes of lateness
  - Number of missed log-ins
  - Total number of bugs for the week/month

07. Recruitment

✓ Manage job positions by department

✓ Manage candidate profiles by stage

✓ Allow receiving candidate profiles from the website, including an attached CV, with CV preview functionality

✓ Recruitment report: Display charts and pivot tables

✓ Standardize the recruitment process by step to ensure compliance with requirements

07. Recruitment

✓ Configure email responses for candidates by stage, with an option to send or skip emails when changing their profile status

✓ Allow rejecting multiple candidates at once

✓ Automatically create a user account with basic permissions when a new employee is added

✓ Delete candidate profile files when rejected or hired as a permanent employee

08. Payroll

- Calculate and manage employee salaries per period based on their contract salary structure

- Manage salary structure configuration

- Automatically calculate the number of working days and leave days from attendance and leave data

- Handling the case of updating the contract in the month (salary change)

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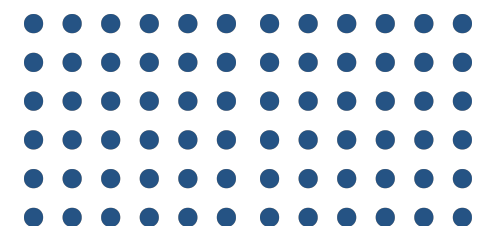
08. Payroll

- Send payroll emails to employees in their preferred language

- Quickly view total salary costs, including salary, allowances, insurance, and taxes

- Create and manage bulk payroll slips for the whole company

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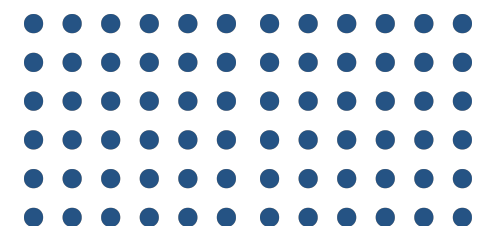
09. Lunch

- Manage employee lunch orders

- Dish configuration includes: name, price, photo, available date and group

- Create a daily menu

- Manage suppliers

- Manage lunch order history by employee and by supplier

- Track and manage total lunch expenses incurred by employees

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09. Lunch

- Manage employee deposits within the system

- Configure lunch order notifications

- Set the maximum overdraft limit for lunch orders

- Send email notifications of each employee's total lunch order expenses
  - Attach a VietQR-generated QR code for bank transfers, automatically recording the payment amount when scanned

- Configure the payment-receiving account

10. Discuss

Allow creating new communication channels and adding employees to the channel

Provide online meeting functions in communication channels or directly between members

11. Maintenance

- Manage maintenance and servicing requests by stage

- Manage the maintenance schedule via a visual calendar interface

- Manage equipment information

- Manage equipment group information

- Manage detailed image information for each device

- Add and print barcodes for each device

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KNOWLEDGE BASE

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01. Knowledge

✓ Manage knowledge information pages

✓ Manage categories and create knowledge summary menus

✓ Manage attached file list

✓ Manage access to categories

KNOWLEDGE BASE

01. Knowledge

- ✓ Manage tags and labels for knowledge information pages

- ✓ Assign permissions to edit and approve knowledge pages

- ✓ Manage update history and approval requests for knowledge pages

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KNOWLEDGE BASE

02. Google Attachment

✓ Manage and configure reports using templates in Google Sheets and Google Docs

✓ Generate and print invoices in PDF format

✓ Generate monthly employee attendance sheet

✓ Allow menu creation to trigger report generation using configured templates

01. Contacts

❖ Manage all contact information within the system

❖ Handle contact cards, titles, and professions

❖ Manage country, state/province, and regional group

❖ Configure bank details and accounts

❖ Set up sales staff, teams, payment terms, pricing tables, and delivery methods for sales and purchases

❖ Quickly view sales orders and invoices issued

❖ Quickly view meetings, opportunities, and contracts

❖ Access loyalty card information (if available)

CUSTOMER

01. Contacts

❖ Configure contacts as individuals or companies

❖ Auto-generate customer codes for company contacts

❖ Prevent duplicate contact creation/editing based on specific fields

❖ Add status and blacklist contacts based on their status

❖ Automatically store sub-contacts when saving a company contact

❖ Record the customer's primary currency

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CUSTOMER

02. CRM

- ❖ Manage opportunities by status
- ❖ Manage customer accounts
- ❖ Manage customer quotations
- ❖ Manage sales teams
- ❖ Configure activity and recurring plans

02. CRM

❖ Manage leads and reasons for losing leads

❖ Generate reports with charts and tables for forecasts, opportunities, customers, and next actions

❖ Auto-generate lead codes based on a configured template, distinguishing between employees and customers

❖ Hide/show leads based on configuration, without changing customer status for successful conversions
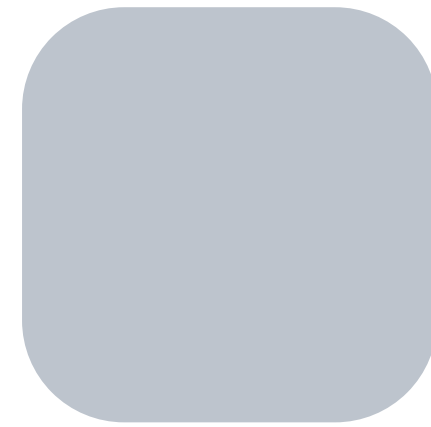
WEBSITE

❖ Manage multiple websites within the system

❖ Enable direct website editing with drag-and-drop
  pre-defined blocks

❖ Perform SEO optimization

❖ Track links for each website
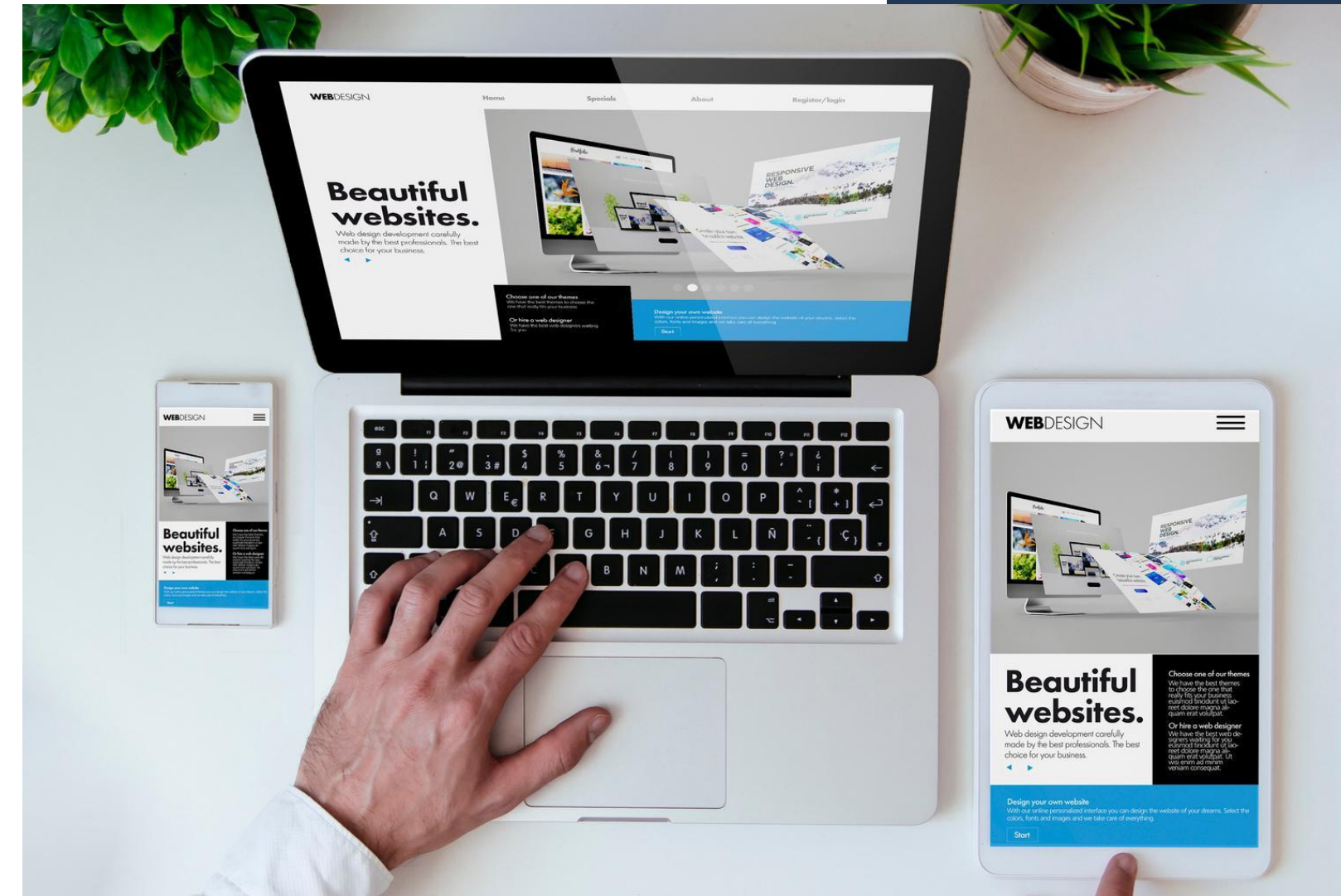
WEBSITE

❖ Manage and edit website menus

❖ Manage website content: Pages, Products, Events,

Courses, Recruitment, Forum posts

❖ Generate reports with charts and tables: Analytics,

Online sales, Visitors, Page views, etc.

INTEGRATION

Google Calendar

Sync calendar between Google Calendar and Odoo

Hubspot

Odoo syncs information with Hubspot daily

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EXPENSES

- ✓ Record expenses
  - ○ Allow employees to record daily expenses
  - ○ Allow attaching invoices to each expense

- ✓ Generate expense reports

- ✓ Record expense payments after approval

- ✓ Manage expense reports by status

- ✓ Manage expense reports by category

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SMART SALES MANAGEMENT

SMART SALES MANAGEMENT

CONTENTS

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SALES

INVOICE

SALES

- Manage customer quotations
- Manage customer orders by status
- Manage sales team
- Manage customer information
- Manage product information

SALES

- Manage price list

- Manage discounts and loyalty programs

- Manage gift cards and e-wallet

- Manage customer contracts

SALES

- Allow the option to change the unit price when updating order details
- Record additional project information for each order line
- Add a field to capture the billing month
- Generate reports in chart and table formats with criteria based on the billing month: Sales, sales staff, products, customers

INVOICE
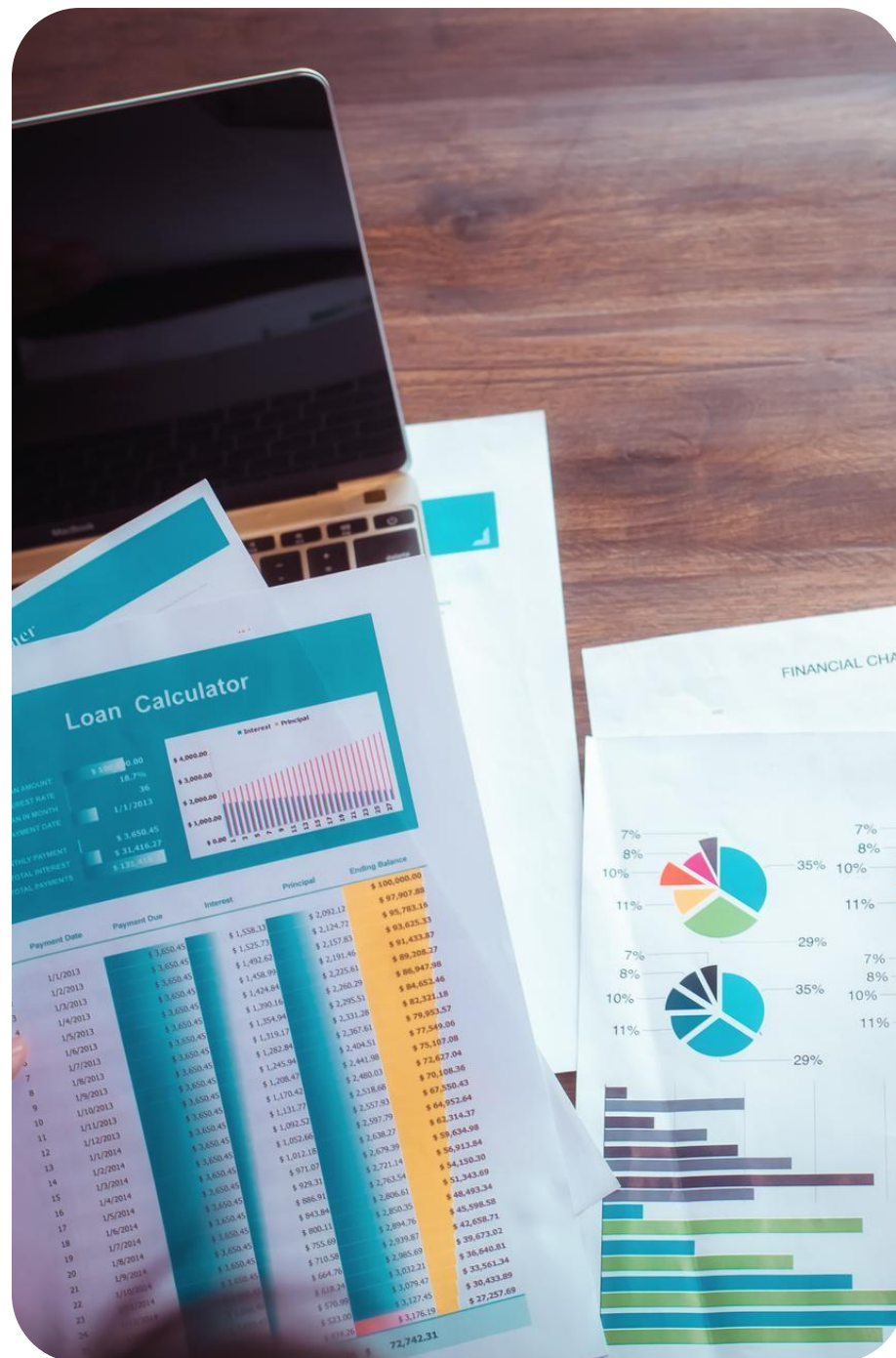
- ✓ Manage customer invoices by status and payment condition

- ✓ Manage customer payments and supplier payments

- ✓ Manage supplier invoices by status and payment condition

- ✓ Manage credit notes

- ✓ Manage reimbursements

- ✓ Generate reports in chart or table format: Invoice analysis

- ✓ Configuration: Payment terms, Incoterms, Banks, Journals, Taxes, Currencies used in the system, Exchange rates,...

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INVOICE

- ✓ Financial localization: Taxes, financial location, account system, statutory reports by country

- ✓ Configure default sales and purchase taxes

- ✓ Configure rounding method: Per line or total

- ✓ Configure the company's primary currency

- ✓ Configure options for sending sales invoices

- ✓ Allow displaying the customer's address on specific invoices

- ✓ Allow rounding the amount
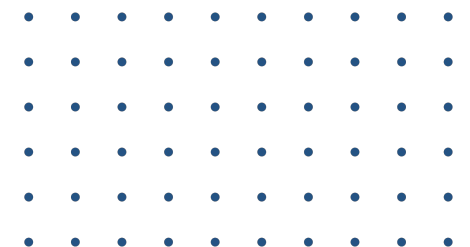
INVOICE
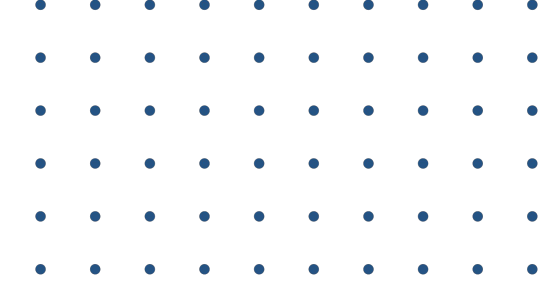
- Configure the company's default Incoterm

- Configure sales credit limits

- Display the total receivable amount in words on the invoice

- Configure options to allow online payment

- Configure profit margin analysis

- Allow the use of Storno accounting
  - Refund invoices carry a negative receivable/payable amount instead of reversing the original transaction
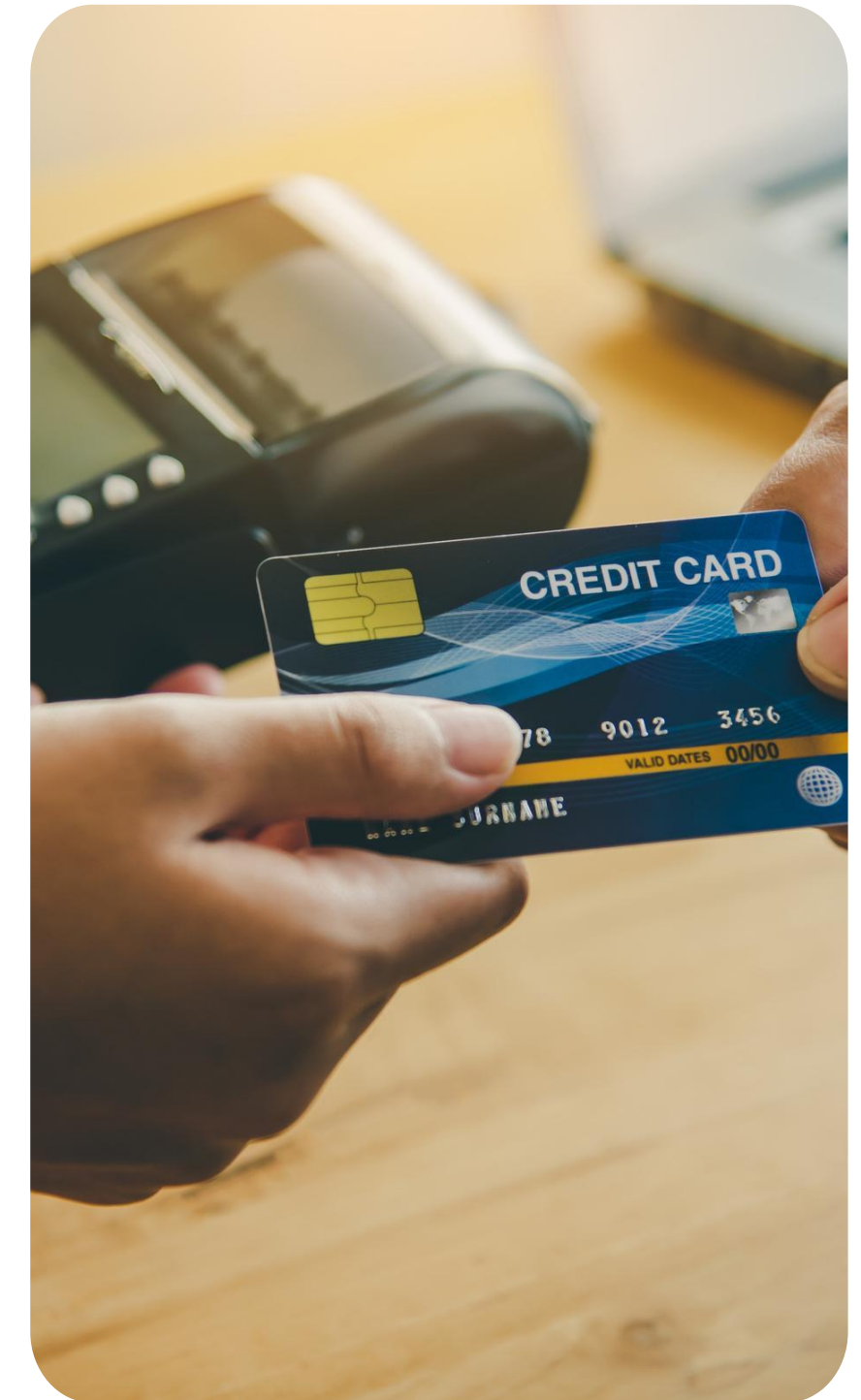
INVOICE

- ✓ Allow configuration of the company's accounting mode
  - The accounting mode will change the invoice/invoice payment coding
- ✓ Redesign the invoice template to be sent to customers
- ✓ Automatically select the corresponding bank account according to the invoice currency field
- ✓ Allow selection of the invoice calculation month and year
- ✓ Automatically generate the invoice code in the structure: Year-Customer Code-xxxx
- ✓ Send invoice payment notifications to customers, with optional related emails

DIGITAL LEARNING PLATFORM

E-LEARNING

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- Manage online courses

- Manage the list of participating students

- Add/Invite students to the course

- Quick view :
  - Total number of visitors viewing the course
  - Total lessons posted in the course
  - Total certificates issued for the course
  - Total number of reviews
  - Go to the course on the website
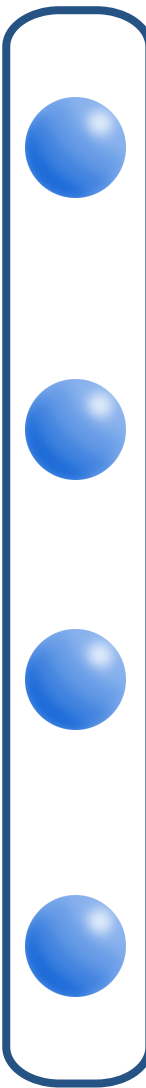
- Edit course content on the website

E-LEARNING

- Configuration for allowing course sales

- Manage and configure flexible course content

- Manage course certificates

- Configure relevant keywords

- Generate reports in chart and table formats: courses, content, revenue, students, reviews, and quizzes

E-LEARNING

- Configuration of course description: What will you learn? Who is this course for?

- Configure and manage course groups

- Manage course information and responsible instructors

- Manage online student information

SURVEY
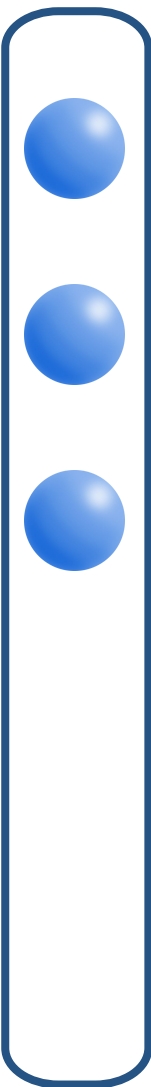
Manage surveys

Manage survey participants

Classify surveys by group (purpose of use):

- Candidate interviews

- Customer feedback surveys

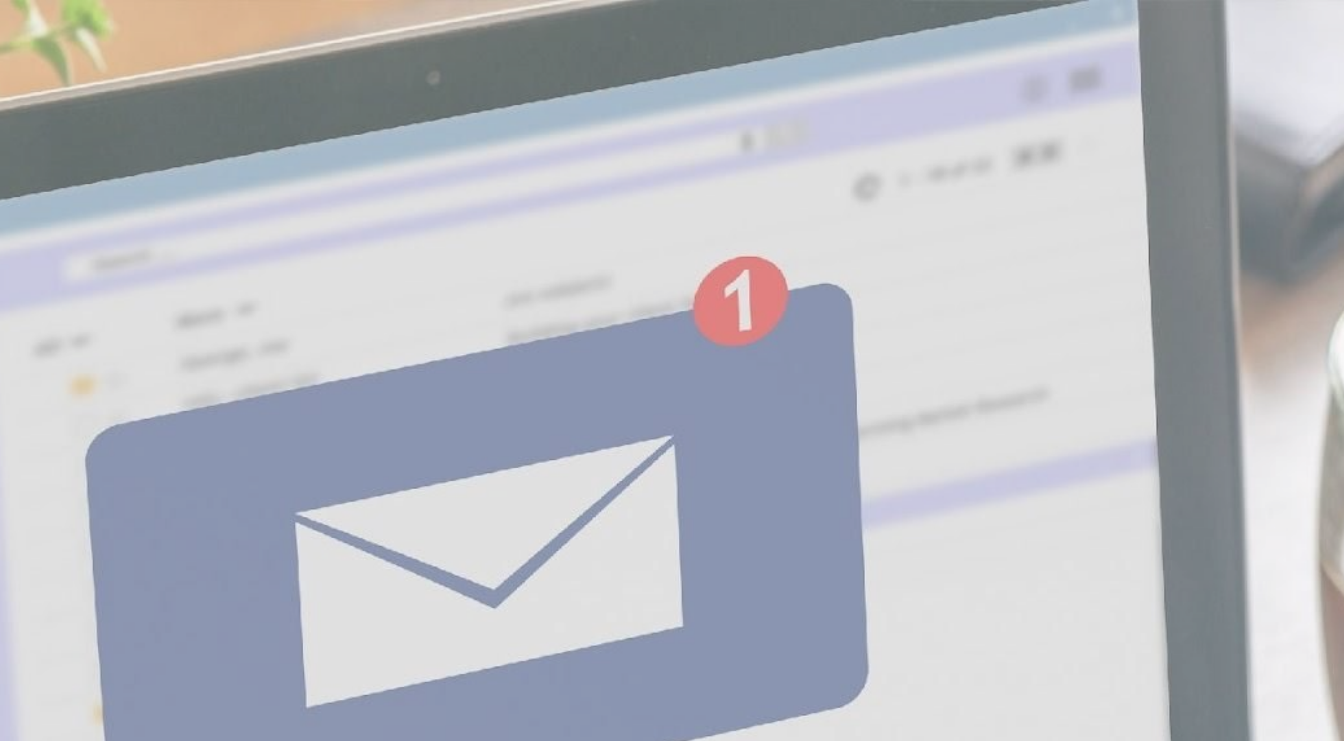- Training

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TARGET MARKET

TARGET MARKET
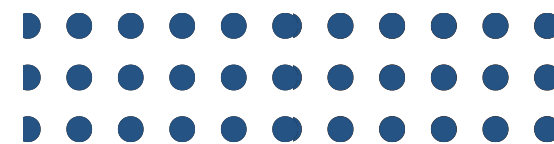
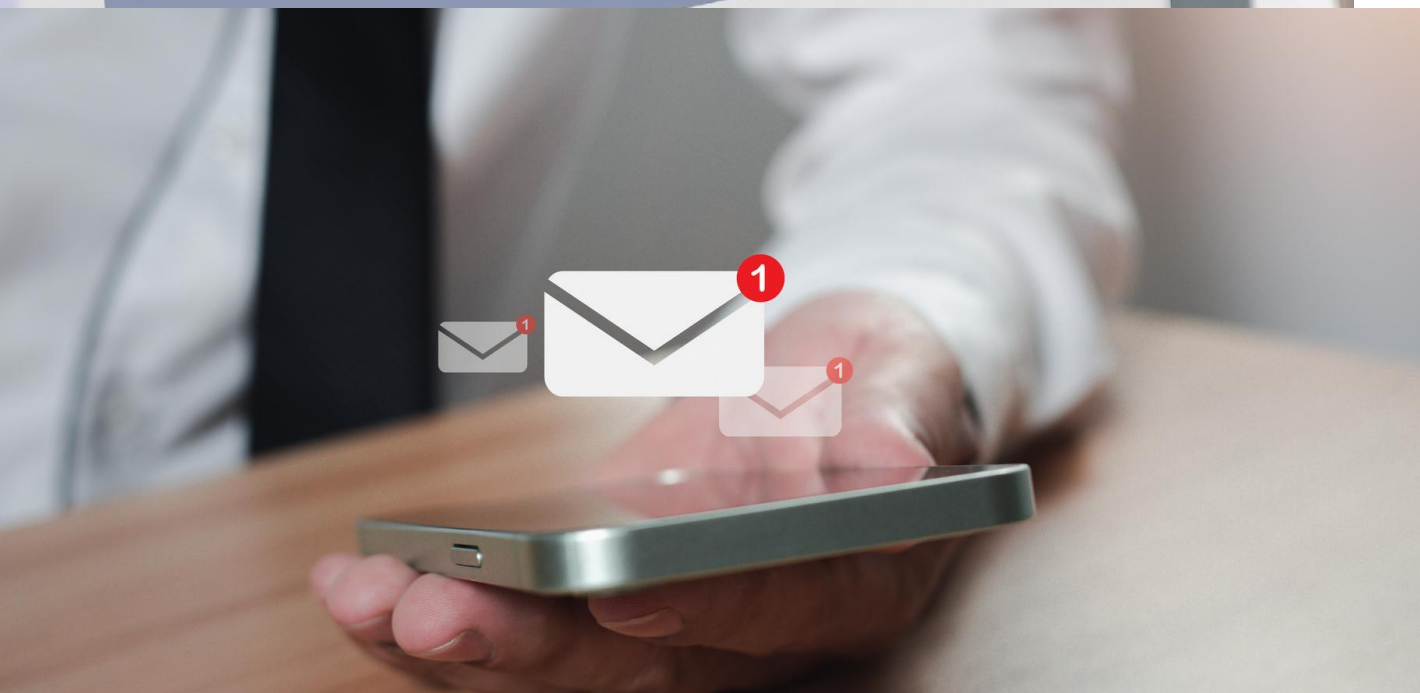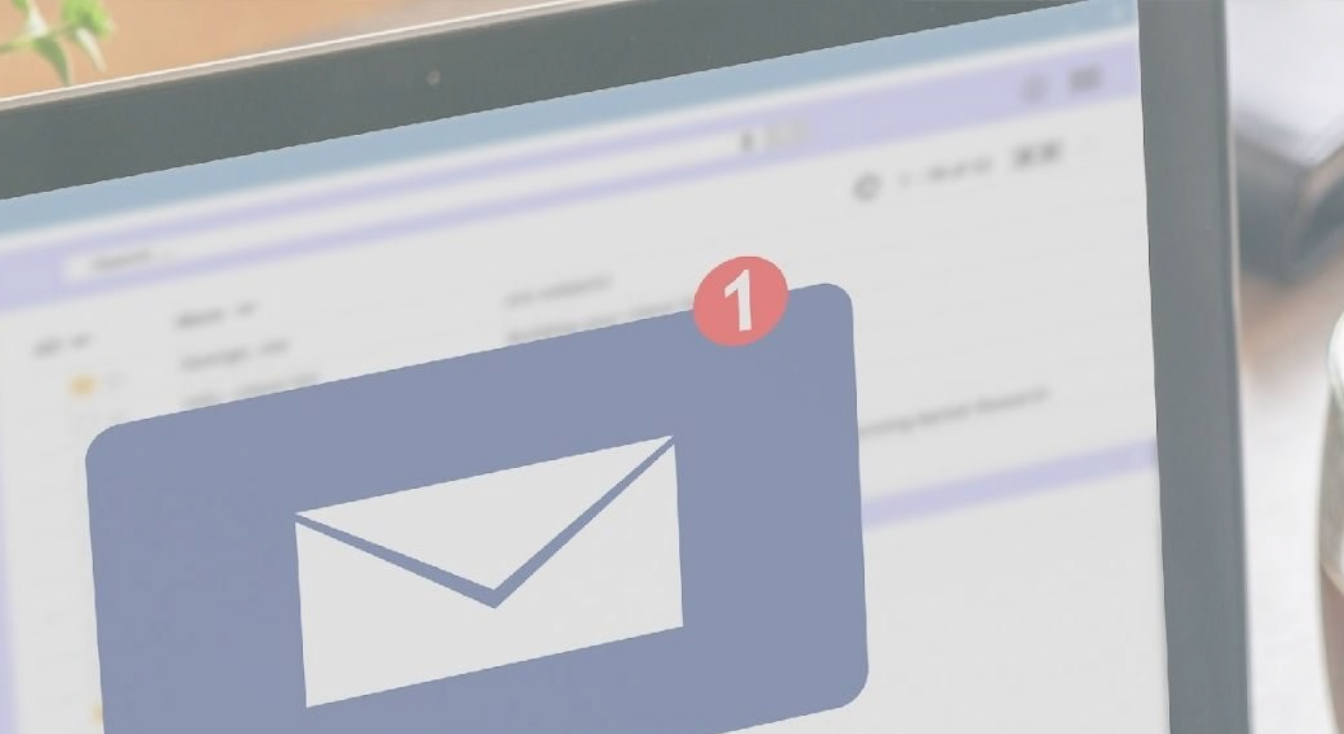**EMAIL MARKETING**
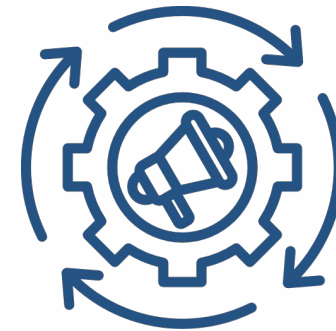
MARKETING AUTOMATION

EVENTS

EMAIL MARKETING

▶ Manage marketing emails by status

▶ Manage mailing list

▶ Manage contacts in the mailing list

▶ Manage campaigns by status

▶ Reports:

  ○ Bulk email analysis

  ○ Opt-out report

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EMAIL MARKETING

▶ Synchronize information with HubSpot daily

▶ Allow only one contact to belong to a single mailing list

▶ Emails that are on the blacklist should not be included in any other mailing list

▶ If the email sending server is configured as AWS SES:
   ○ Synchronize the list of emails marked as BOUNCE or COMPLAINT on SES with Odoo and mark them as blacklist emails

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MARKETING AUTOMATION
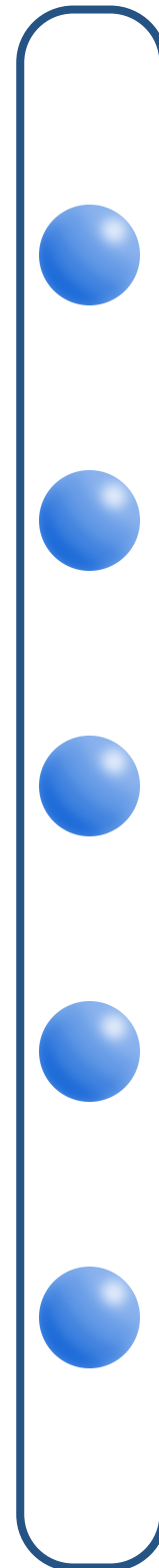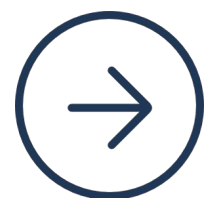
- Manage marketing campaigns
- Manage email marketing templates
- Manage click-throughs on links in email marketing
- Track campaigns and participants in the campaigns
- Record logs when running campaigns

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EVENTS

- Manage events by stages

- Support event check-in with participant code scanning or manual entry

- Reports in chart and table formats: Participants, Revenue

- Configure event templates, event stages, and event labels

- Configure a navigation menu for events with schedules, content, and content recommendations

- Configure display of sponsors and exhibitors on the event page

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ISO COMPLIANCE MANAGEMENT

ISO STANDARDS

ISO Documents

All ISO 9001:2015 and ISO/IEC 27001:2013 documents are available in the Knowledge feature

- Users can search and view them directly in Odoo

Related Processes

○ Recruitment process

○ Employee evaluation process

○ Equipment issuance and retrieval process

○ Resource issuance and retrieval process

○ Customer feedback handling and satisfaction measurement process

Guidelines and Training

Build courses and tests for each course in the E-Learning section

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BUSINESS ORCHESTRATION AND AUTOMATION TECHNOLOGIES

RECRUITMENT PROCESS

01   Create a recruitment request form

02   Create and post the job description

03   Approve the recruitment request

04   Receive and review candidate resumes

05   View the list of candidates

RECRUITMENT PROCESS

06 Create a survey form to evaluate interview results

07 Create an interview invitation and job offer letter to send to candidates

08 Create accounts for new employees

09 Store employee profile information

EMPLOYEE EVALUATION PROCESS

01. For HR

○ Create an annual performance review cycle

02. For Employees

○ Receive evaluation notifications from Odoo via Slack/Email, based on user configuration

○ Conduct self-assessment using the provided template

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EMPLOYEE EVALUATION PROCESS

03. For Manager

- Create employee appraisal goals (KPIs)
- Create employee appraisal forms
- Conduct appraisal surveys from relevant personnel
- Evaluate based on the employee's achieved goals, work processes, and survey feedback
- Make the final appraisal decision for the employee

04. For Evaluated Personnel

- Receive appraisal invitations from the manager via Slack/Email based on user configuration
- Fill out the appraisal content in the survey form

EQUIPMENT ISSUANCE, BORROWING AND RETRIEVAL PROCESS

01. Equipment Issuance

- Create an equipment approval request
- Receive notification and approve the request
- IT Support fills in the equipment details and proceeds with issuing the equipment

02. Equipment Borrowing

- Create an equipment borrowing approval request
- Receive notification and approve the request
- IT Support fills in the equipment details and proceeds with issuing the equipment for borrowing

03. Equipment Retrieval

- If the equipment's usage period expires, the equipment manager removes the user's name from the equipment record to retrieve it.

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RESOURCE ISSUANCE AND RETRIEVAL PROCESS

01. Resource Allocation

- Create an online resource allocation approval request
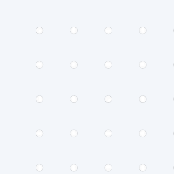- Approve the request and allocate the resource via the system

02. Resource Retrieval

- Create an online resource retrieval request
- Approve the resource retrieval request online

ENTERPRISE MOBILE APPLICATIONS

CONTENTS

ACCOUNT MANAGEMENT

▶ Create account

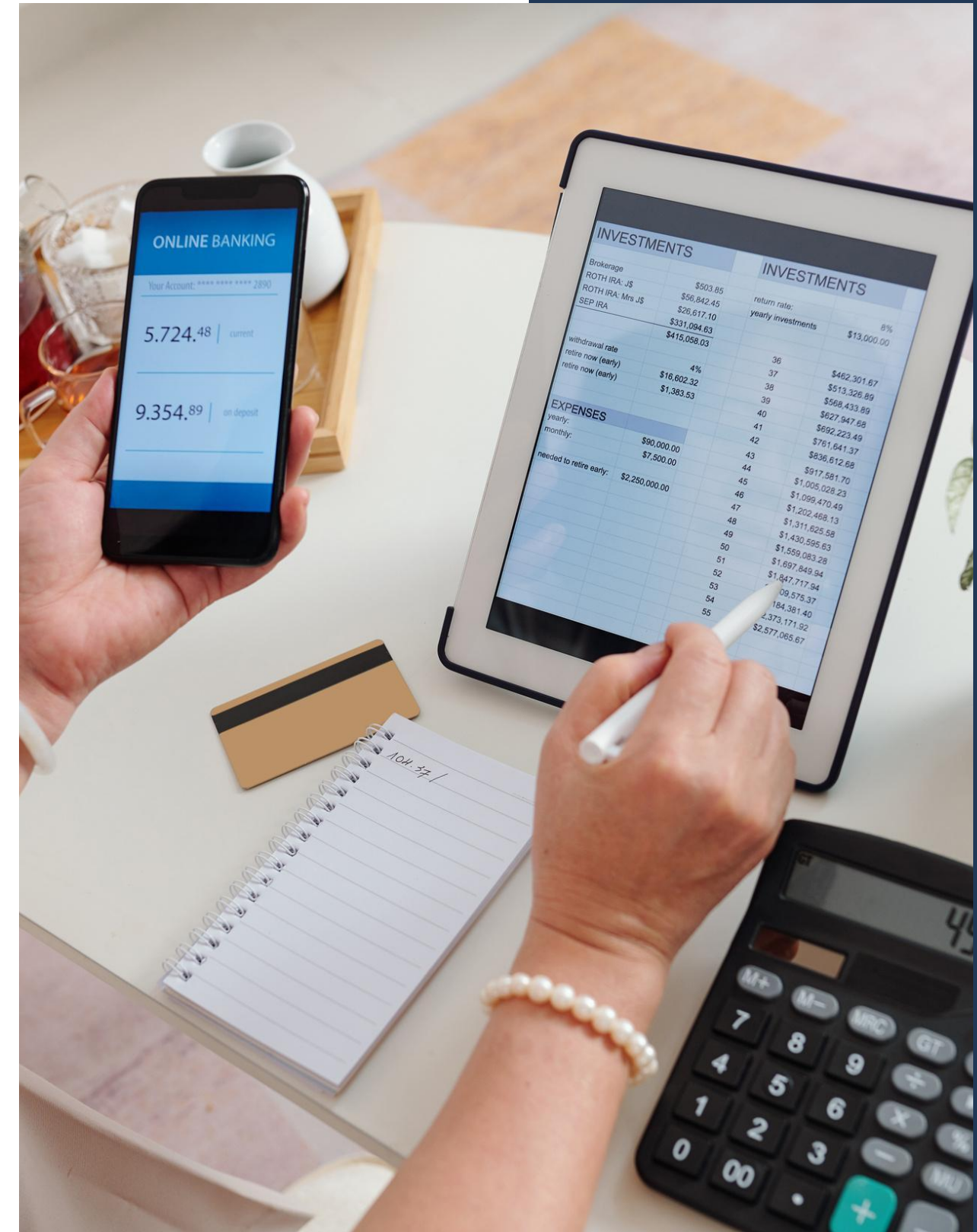▶ Allow account information editing

▶ Enable/Disable two-factor authentication (2FA)

▶ Change password

▶ Reset password

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ATTENDANCE MANAGEMENT

- Check-in/check-out date and time

- Check-in/check-out location coordinates

- View specific check-in/check-out locations of employees on a map

- Total working hours ((within scheduled working hours)

- Total overtime hours (Outside scheduled working hours)

- Track attendance history

- Configure attendance data managers for each employee (Designated managers can edit attendance data for their assigned employees)

TIME-OFF REQUEST MANAGEMENT

- Create a time-off request

- Approve time-off requests

- Add followers to the time-off schedule

- Notify followers upon creation, approval, or rrefusal of time-off requests
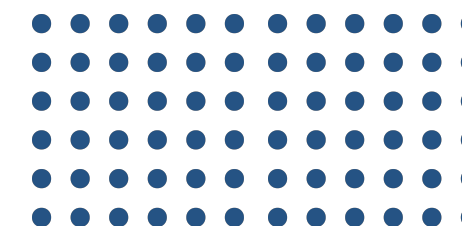
APPROVED REQUEST MANAGEMENT

1 Approve new issuance, borrowing, or retrieval of equipment

2 Approve online resource allocation or retrieval
- Automatically create a resource allocation task in the relevant project

3 Approve remote work requests

4 Add followers to approval requests

5 Notify followers upon creation, approval, or refusal of requests

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SOLUTIONS FOR
ENTERPRISE GROUPS

TECHNOLOGY

Read more

PROJECT

- Project information management
- Configure the stages of the project and task stages
- Configure whether to automatically generate project codes or not
- Configure checklists to be done for each task. Allows re-selecting defined checklist templates
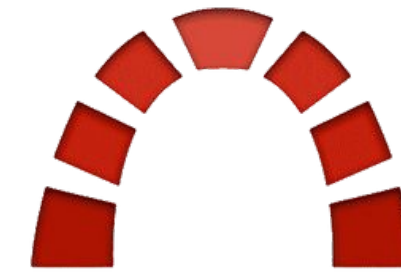- Sync work log data from Redmine to Odoo

INTEGRATION

Sync notifications from Odoo and send messages to team members via Slack

Sync work time data from Redmine to Odoo to ensure better data consistency
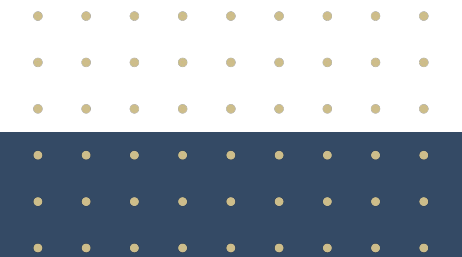
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E-COMMERCE

Read more

Visit Our Website
bachasoftware.com

WEBSITE

✔ Allow easy creation and editing of page layouts by dragging and dropping existing blocks

✔ Manage website content: Products

✔ Create new products, add attributes, details, and edit product pages directly on the website interface

ORDER MANAGEMENT

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View the list of orders and their status, list of customers with accounts on the sales website

Automatically create orders when customers interact with the sales website interface

- View details of unpaid shopping carts
- Automatically send email notifications to customers after a specified time period

Manage payment methods and shipping methods

PRODUCT MANAGEMENT

When adding a new product, there will be fields for:

Optional Products, Accessory Products, Alternative Products

Optional Products

When a customer adds a product to the cart, a pop-up window will display related products, allowing the customer to review and add these items to the cart along with the original product

Accessory Products

These products will appear on the checkout interface, allowing customers to choose to purchase them before completing the payment

Alternative Products

These products will appear on the checkout interface, allowing customers to choose to purchase them before completing the payment
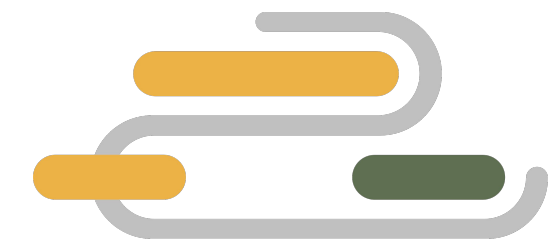
PRODUCT MANAGEMENT

About product price list: You can choose price list for all products or for any

group of products.

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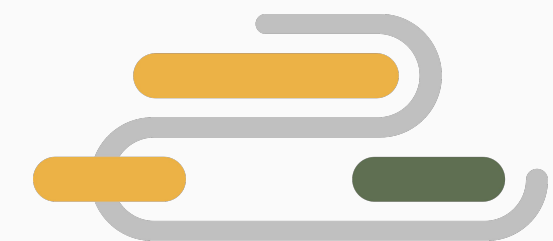
LIVE CHAT

01   View the list of ongoing conversations

02   Create a new channel, with the ability to set the visibility properties of the channel based on country or URL

03   Allow the setup of predefined responses for frequently asked questions

04   Users can create chatbots to automatically answer questions

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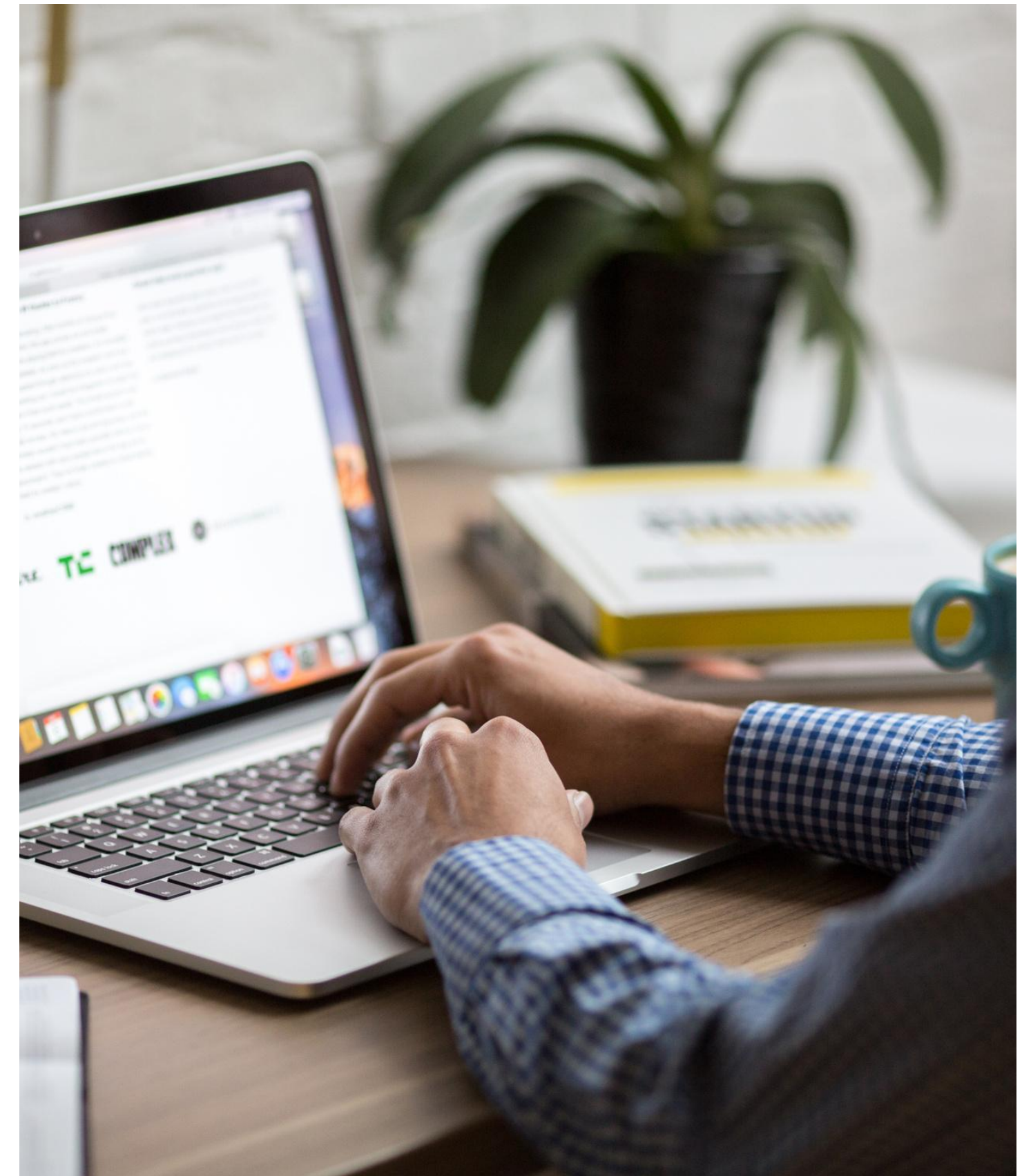
LIVE CHAT

05 Users can create lead generation bots

06 View information about customers visiting the sales website

07 Reports: Number of messages, customer ratings, and activity history statistics of the chat channel manager

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INVENTORY MANAGEMENT

01. Product Management

✅ Product Configuration

- Product type
- Unit of measurement
- Product packaging
- Product packaging type

✅ Product Tracking

- Assign batch numbers and serial numbers to products for easier tracking.
- Track the product lifecycle from warehouse entry, storage, to dispatch. You can track a product group based on batch or serial number

INVENTORY MANAGEMENT

02. Inventory management

- ✓ Warehouse: Represents a physical location with a specific address

- ✓ Location: Specific areas within a warehouse (e.g., shelves, floors

- ✓ Users can adjust the actual quantity of products if discrepancies are found during inventory checks

- ✓ Reports: Inventory quantity, location, movement history, and the time products have been in storage

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INVENTORY MANAGEMENT

03. Delivery and receiving management

- ✅ Inbound/Outbound Flow
  - Allows configuration of product inbound and outbound processes.
  - Allows sales from multiple warehouses within a single order
  - Dropshipping

- ✅ Shipping: Calculates shipping costs for sales orders

- ✅ Ordering: Ensures inventory availability before selling and shipping

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PRODUCT MANAGEMENT

01. Purchase Management

✅ **Product Management**

- View the product list, details about attributes, and pricing

- View and create price lists, as well as set delivery times from various suppliers

- Set default tax rates when importing products

- Select invoice time

PRODUCT MANAGEMENT

01. Purchase Management

✅ **Quotation Management**
- Create and manage quotation requests for suppliers
- Display and categorize quotation requests
- Send quotations via email
- Create purchase orders from quotations

✅ **Purchase Management**
- Create and send purchase orders
- Purchase reports

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PRODUCT MANAGEMENT

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02. Repair Order Management

Create and track the status of repair requests

Create quotations for repair requests

Reports: Number of repaired products, repair time, tax, total cost

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RETAIL

Read more

Visit Our Website

bachasoftware.com

INVENTORY MANAGEMENT

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01. Product Management

✅ Product Configuration
- Product type
- Unit of measurement
- Product packaging
- Product packaging type

✅ Product Tracking

- Assign batch numbers and serial numbers to products for easier tracking.
- Track the product lifecycle from warehouse entry, storage, to dispatch. You can track a product group based on batch or serial number

INVENTORY MANAGEMENT

02. Inventory management

✓ Warehouse: Represents a physical location with a specific address

✓ Location: Specific areas within a warehouse (e.g., shelves, floors

✓ Users can adjust the actual quantity of products if discrepancies are found during inventory checks

✓ Reports: Inventory quantity, location, movement history, and the time products have been in storage

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INVENTORY MANAGEMENT

03. Delivery and receiving management

- ✓ Inbound/Outbound Flow
  - Allows configuration of product inbound and outbound processes.
  - Allows sales from multiple warehouses within a single order
  - Dropshipping

- ✓ Shipping: Calculates shipping costs for sales orders

- ✓ Ordering: Ensures inventory availability before selling and shipping
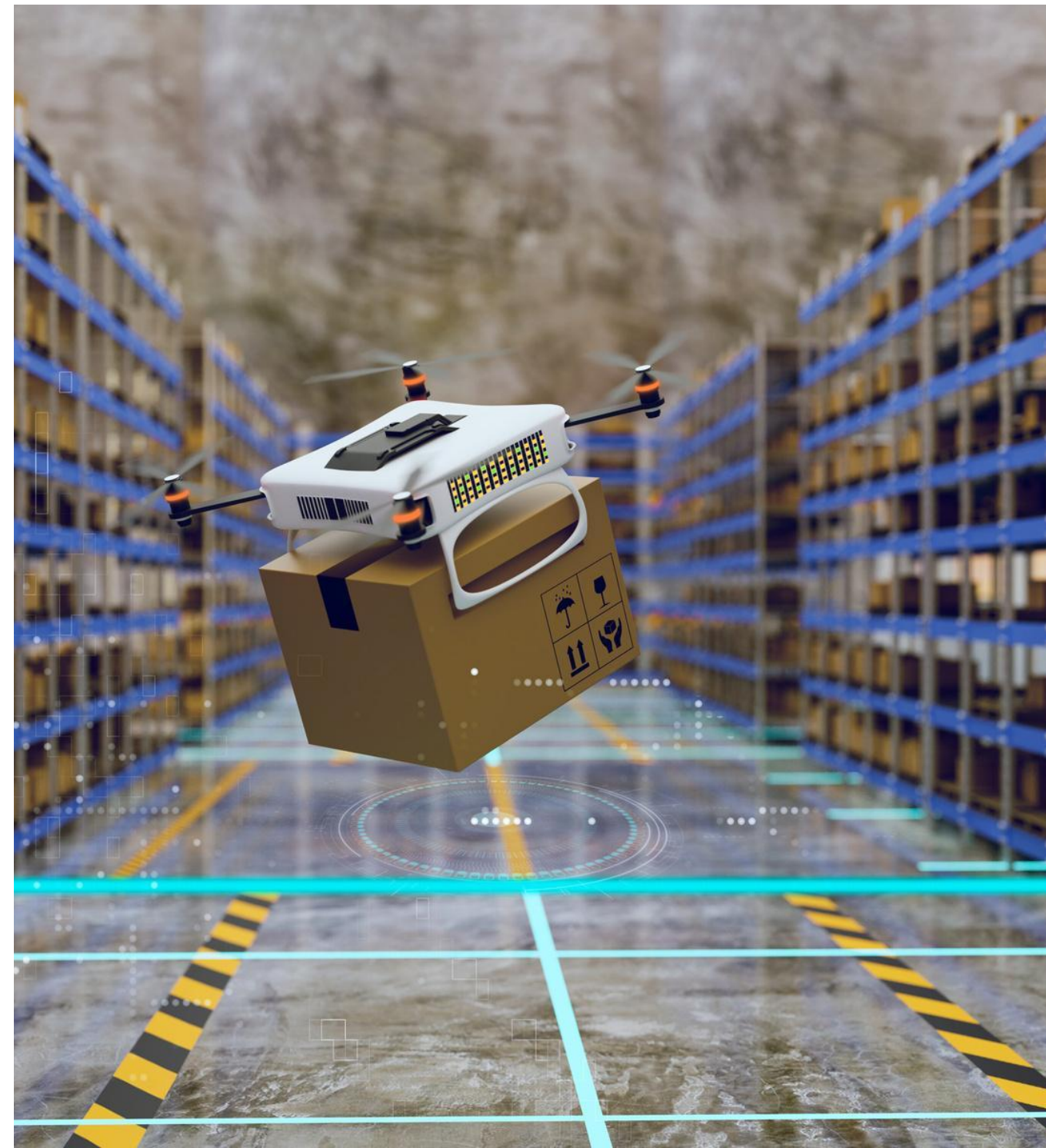
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PRODUCT MANAGEMENT

01. Purchase Management

✅ **Product Management**

- View the product list, details about attributes, and pricing

- View and create price lists, as well as set delivery times from various suppliers

- Set default tax rates when importing products

- Select invoice time

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PRODUCT MANAGEMENT

01. Purchase Management

✓ **Quotation Management**

- Create and manage quotation requests for suppliers
- Display and categorize quotation requests
- Send quotations via email
- Create purchase orders from quotations

✓ **Purchase Management**

- Create and send purchase orders
- Purchase reports

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PRODUCT MANAGEMENT

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02. Repair Order Management

Create and track the status of repair requests

Create quotations for repair requests

Reports: Number of repaired products, repair time, tax, total cost

POINT OF SALE MANAGEMENT

✅ Allows adding and viewing points of sale

✅ Employee management: Add employees to the point of sale and create a pin code for employees to log into the system of the added point of sale

✅ View order details of all points of sale

✅ View login sessions of points of sale

✅ View amount and payment method of orders

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POINT OF SALE MANAGEMENT

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- View a list of customers who have purchased or are ordering at points of sale

- Set up separate price lists for each product at different points of sale

- Allow to create and view discount programs and membership schemes for individual stores

- Manage the map of points of sale

- Adjust input and output taxes of points of sale

POINT OF SALE MANAGEMENT

✓ Set up different payment methods for points of sale

✓ Configure, set up payment devices

✓ Reports: Orders, sales, by employee

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EDUCATION

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E-LEARNING

Required lesson configuration

Must complete the required course before continuing with the next lesson

Certificate Template

Design the certificate template that is issued after completing the course

ON-SITE LEARNING

- ✅ Manage facilities, learning paths, courses, classes

- ✅ Manage class arrangements for new students

- ✅ Manage student attendance

- ✅ Transfer class feature for students

- ✅ Manage facilities, learning paths, courses, classes

- ✅ Manage class arrangements for new students

- ✅ Manage student attendance

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ON-SITE LEARNING

- ✓ Create tests
- ✓ Manage timetables
- ✓ Create final exams and ranking

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RESTAURANT

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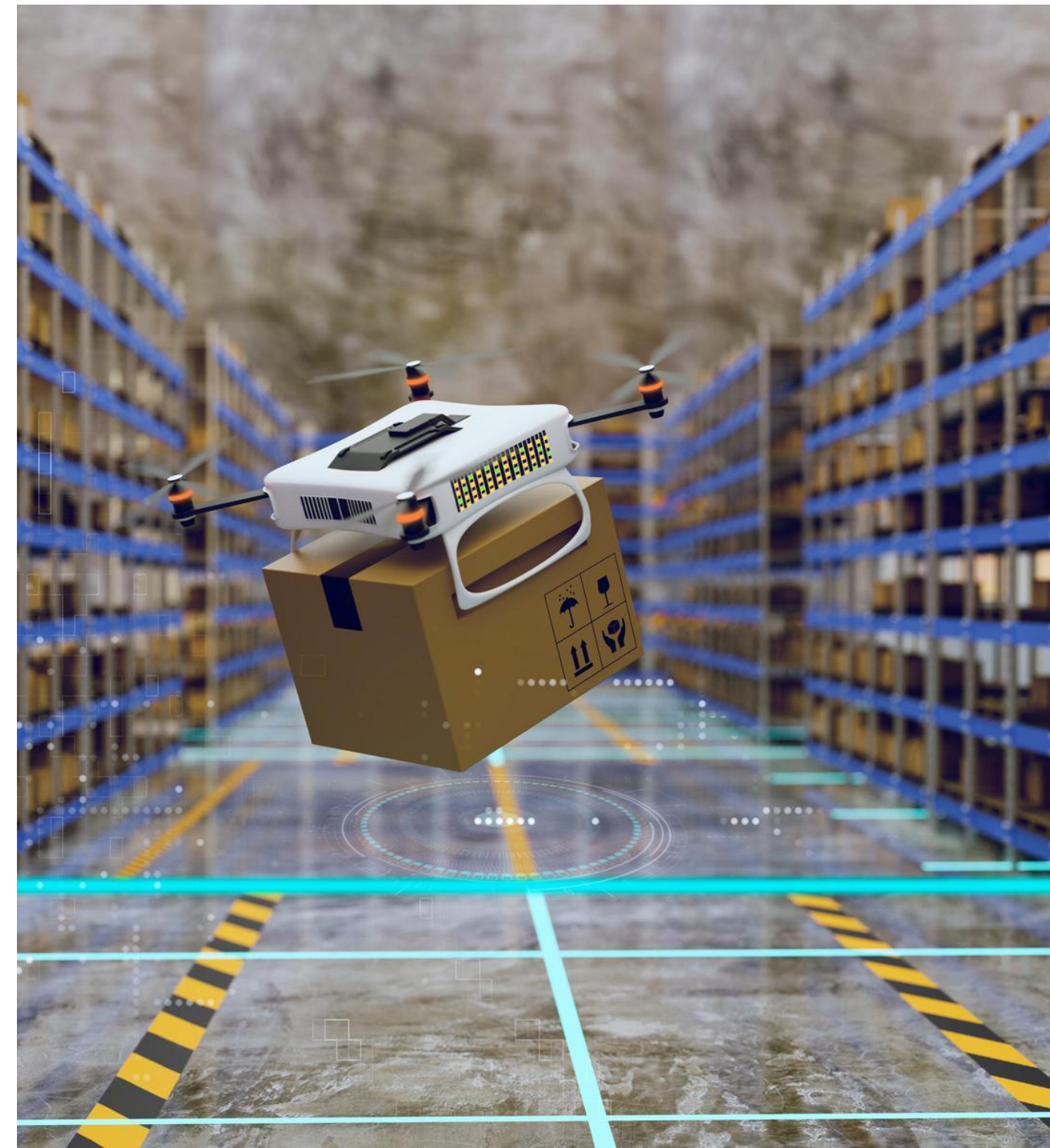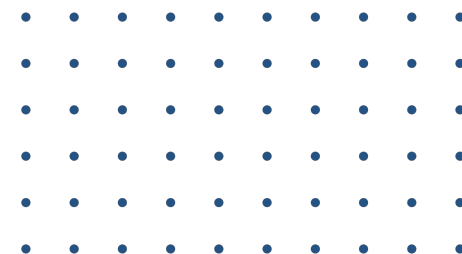✓ Ordering: Ensures inventory availability before selling and shipping

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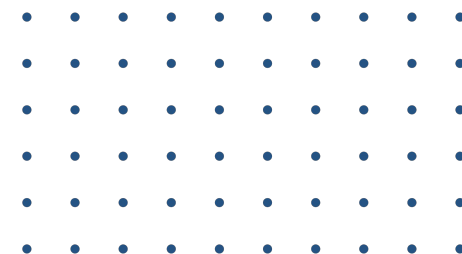## 01. Purchase Management

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SERVICE

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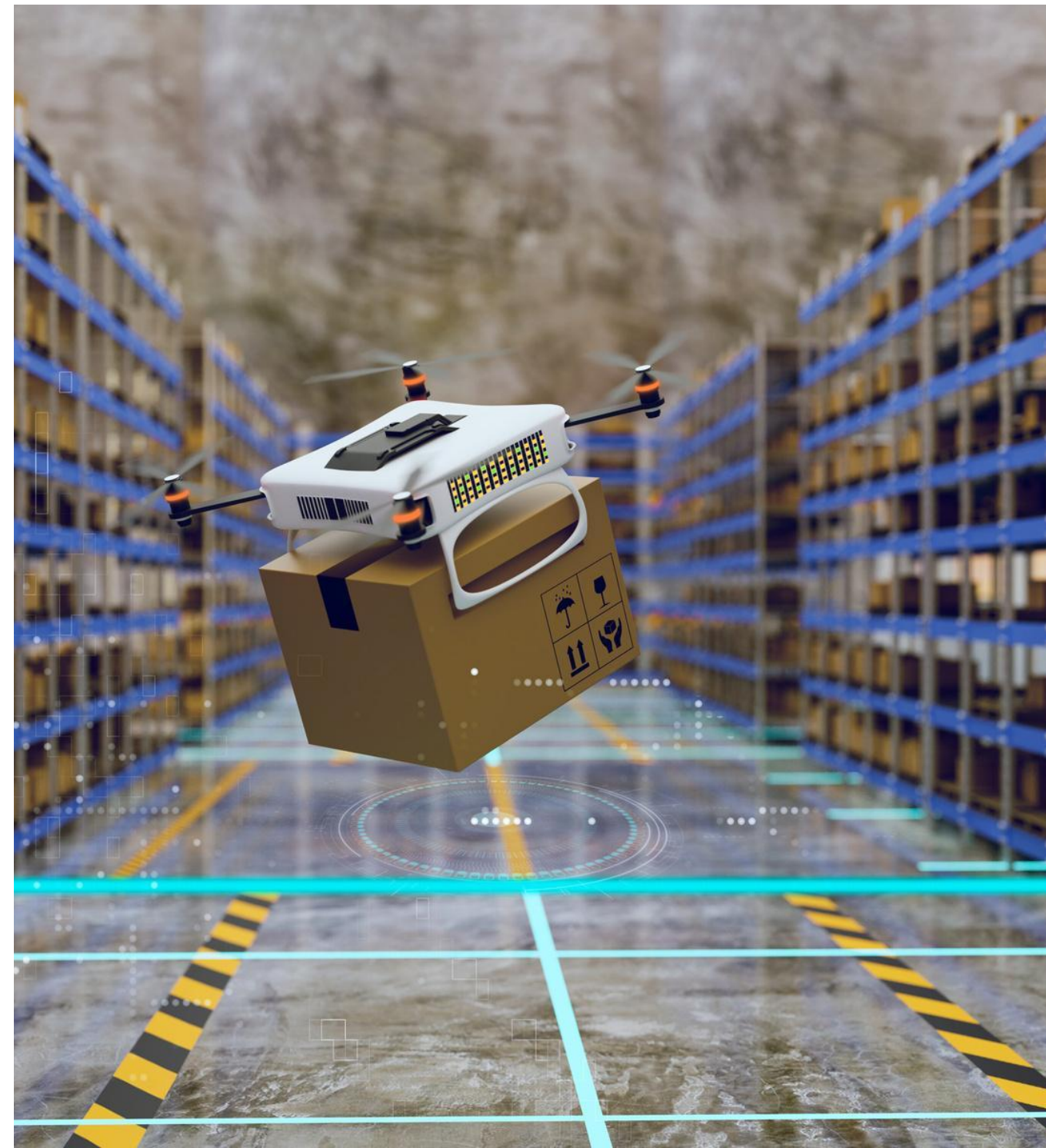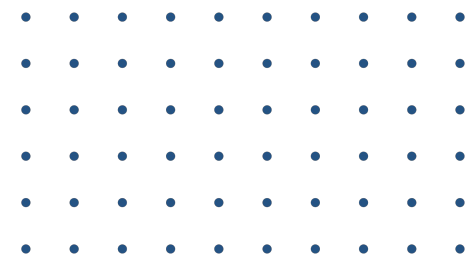- ✓ Ordering: Ensures inventory availability before selling and shipping

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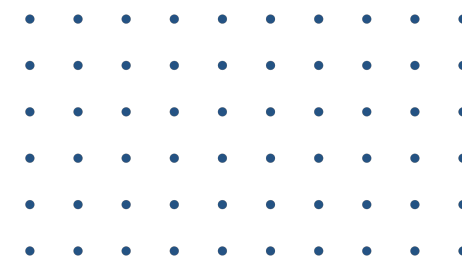
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THANK YOU!

📞 +84-88616-0880

✉️ hello@bachasoftware.com

🌐 bachasoftware.com

📍 6th Floor, Technosoft Building

15/8 Duy Tan Str., Cau Giay Dist., Hanoi, Vietnam