

# SCALE UP!



The Business Game  
**odoo**

This version is adapted for Odoo 16.

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**Publisher :** Odoo S.A. Chaussée de Namur, 40 -  
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More information on : [odoo.com/scaleup](http://odoo.com/scaleup)



# Your Story

# SCALE UP!

"**I am done, I quit!**" are the words you said to your manager 3 months ago. With \$50k of savings, you are ready to start a new adventure: launch the furniture business you have always dreamed of starting.

A month later, your company (MyOffice Inc.) is incorporated! The next step is to recruit a great team. After a few interviews, you hire Sophia as Sales Manager, Marc as Purchase Manager, and Paul as Secretary.



You  
CEO



Sophia  
Sales Manager



Marc  
Purchase Manager



Paul  
Secretary

Paul helps you find an affordable office location. Now, it's time to start doing business; purchase your first products, market your company, sell those products and, hopefully, make a profit!

The first game, "Buy & Sell", will help you setup your B2B business: from buying new products to selling and delivering to customers. Once these processes are in place, you'll be able to choose from 6 other scenarios to develop your strategy:

- Launch a **point of sale** for consumers
- Offer extra **services**
- **Manufacture** your own products
- Manage your inventory with **barcodes**
- **Sell online** with an eCommerce website
- Lease fully-furnished properties

Good luck with your new business!



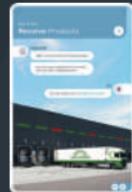


# Game Rules

The game has 7 business cases each with 8-10 cards. **Start with the game “Buy & Sell”, then play the others according to your strategy.** For each card, follow these 3 steps:

1

Read the business case on the front of the card. **Don't look at the back yet!**



2

Complete the business process online, on [www.odoo.com](http://www.odoo.com). **Take your time,** the goal is to learn!



3

Compare what you did with the solution on the back of the card.



## Your Score

Pile the cards front-side up, if you found the solution before looking at the back (even if you did it differently). Pile the cards with their back-side up, if you missed something in the solution. At the end of the game, count the stars at the bottom-right corner of each face. The following table defines your level of success:

16+	14-15	12-13	10-11	7-9

# Buy & Sell

You are the CEO of **MyOffice Inc.**, a modern furniture retailer. To help your business grow, you have decided to setup an integrated management software.

Create your company's database on [www.odoo.com](http://www.odoo.com) through the "Start Now" button and select the Apps required for the following business flow:

**Create** a Product

1

**Purchase** Large Desks

2

**Receive** Products

3

**Control** the Bill

4

**Sell** Products

5

**Deliver** to Customer

6

**Invoice** Customer

7

**Record** Payment

8

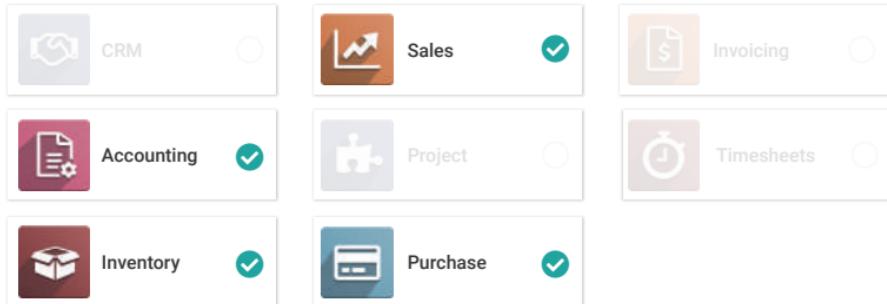
**Analyze** Profits

9



# Buy & Sell

Start Now. It's Free



These are the minimum set of apps required for the flow, but you can install more.

Configure ➔

Company Name

MyOffice Inc.

edu-myoffice-inc.odoo.com

Country

United States

Start now ➔



If your company name starts with 'edu-', the database will exist for 24 months and will be deleted afterwards without backup.

Your own country should be selected by default. The country defines the right taxes, charts of accounts and legal reports.

Once finished, you will receive an email to confirm your database and validate your password.



Buy & Sell

# Create a Product

1



Marc • Purchase Manager

Hi, we visited **Wood Corner**, a new vendor that supplies office furniture. Here is a photo of their **Large Desk** that we like.

You



What's the cost?



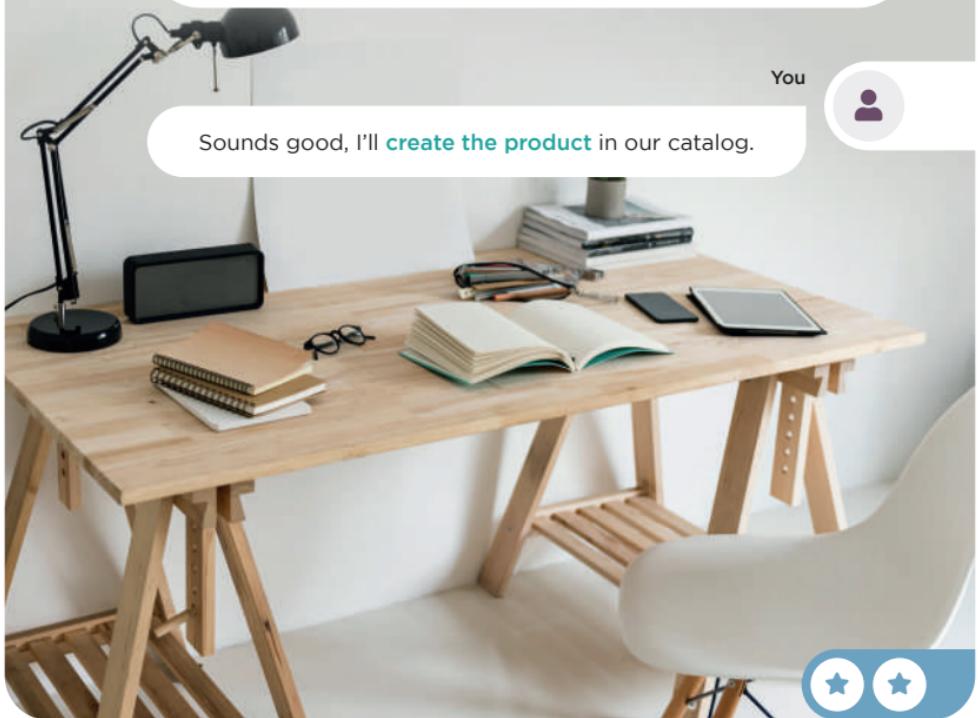
Marc • Purchase Manager

They cost **\$140** each, but they are discounted to **\$100** if we order a **minimum of 10 desks**. We can sell them at **\$220**.

You



Sounds good, I'll **create the product** in our catalog.



# Create a Product

1



Purchase

Products &gt; Products

CREATE

Product Name

★ Large Desk

General Information

Sales

Purchase

Product Type	Storable Product	Sales Price	\$ 220.00
		Cost	\$ 140.00



Any cost between 100 and 140 is considered as correct, because the accounting valuation will depend on future purchases.

General Information

Sales

Purchase

Vendor	Quantity	Price	edit
Wood Corner	10.00	100.00	
Wood Corner	1.00	140.00	



If you don't record a vendor, Odoo automatically creates it at the first purchase order.

With Quantity set at 10 in the first line, the system uses the matching price when creating a purchase order over 10 items.



Buy & Sell

# Purchase Large Desks

2

You



Sophia, I plan to purchase **Large Desks**.  
What are your monthly sales estimates?



Sophia • Sales Manager

Between 9 and 12.

You



Ok, I'll **purchase 10 desks** to start with.



# Purchase Large Desks

2



Purchase

Orders ➔ Requests for Quotation

CREATE

Vendor

Wood Corner



Products

Other Information

Product	Quantity	Unit Price	Taxes	Subtotal
Large Desk	10.000	100.000	15.00%	\$ 1,000.00

Add a line



Taxes vary by country. Depending on your location, you may not have the same tax as the example.



Optionally, you can send it by email.

SEND BY EMAIL



RFQ

RFQ SENT

PURCHASE ORDER

CONFIRM ORDER



RFQ

RFQ SENT

PURCHASE ORDER



This button takes you directly to the Receipt document.



1  
Receipt



Buy & Sell

# Receive Products

3

Incoming Call...



Hello, I'm the driver from Wood Corner.

I'll be at your warehouse in 5 minutes,  
can you open a loading dock?

You



Ok, go to dock 3. I'll **validate the receipt**.



# Receive Products

3



Inventory

## Receipts

⋮

1 TO PROCESS

Reference

WH/IN/00001



Contact

Wood Corner

Status

Ready

EDIT

## WH/IN/00001

Receive From

Wood Corner



Source Document

P00001

Operations

Additional Info

Note

Product

Demand

Done

Large Desk

10.000

10.00



If you don't set any quantity received in the 'Done' column, Odoo asks for a confirmation to accept all the entire demand of ordered quantities.

VALIDATE



DRAFT

WAITING

READY

DONE



Buy & Sell

# Control the Bill

4

Paul • Secretary

Hi! **Today**, we've received a bill from the vendor.

I've put it on your desk, can you **create, check and validate it?**  
No need to pay it right now, the due date is in 2 months.



**Wood Corner**  
1164 Cambridge Drive  
White Tanks, AZ 85340  
United States  
accounting@wood-corner.com

**MyOffice Inc**

1725 Slough Avenue  
Scranton PA, 18540  
United States

## Invoice 2022/0123

Description	Quantity	Unit Price	Amount
Large Desk	10.00	\$ 110.00	\$ 1,100.00
<hr/>			<b>Subtotal</b> \$ 1,100.00
<hr/>			Tax \$ 165.00
<hr/>			<b>Total</b> \$ 1,265.00

Please use the following communication for your payment:  
**INV/2022/0123**

Payment terms: **2 months**



# Control the Bill

4



Accounting

Vendors ▶ Bills

CREATE

Vendor

Wood Corner

Bill Date

Auto-Complete

Select a p. o.

P00001: \$ 1,000.00

Invoice Lines

Journal Items

Other Info

Product

Quantity

Price

Taxes

Subtotal

Large Desk

10.000

100.000

15.00%

\$ 1,000.00



Add a line

CONFIRM



DRAFT

POSTED



Bonus Point • There is a difference between the bill auto-completed by Odoo (\$100) and the vendor bill (\$110). When this happens, you usually send a message to the vendor. You get an extra ★ if you noticed it (even if you did not send the message).

To: Followers of "Draft Bill BILL/2022/0001"



Hello, on your invoice 2022/0123, you charged us \$110 per unit instead of the \$100 we agreed upon. We accept the bill, but we won't pay it until you send us a \$100 refund receipt.



SEND



Buy & Sell

# Sell Products

5



Brandon • Customer

Hi, **Brandon from Azure Interior** speaking.

I've seen beautiful wooden desks in your catalog. Can you **send a quote for 3 desks** to: **brandon@game.odoo.com**?

You



You'll get it by email right now!



# Sell Products

5



Sales

Orders ▶ Quotations

CREATE

Customer

Azure Interior, Brandon



Order Lines

Optional Products

Other Info

Product

Quantity

Unit Price

Taxes

Subtotal



Large Desk

3.00

220.00

15.00%

\$ 660.00

[Add a product](#)[Add a section](#)[Add a note](#)

Clicking on gives you details about the stock.

SEND BY EMAIL

QUOTATION

QUOTATION SENT

SALES ORDER

Wait 30 seconds, you should receive a confirmation email in your inbox if you sent the email to brandon@game.odoo.com. Click [CONFIRM](#).

QUOTATION

QUOTATION SENT

SALES ORDER



This button takes you directly to the Delivery Order.

1  
Delivery

Buy & Sell

# Deliver to Customer

6



Roger • Inventory Manager

I'm in a meeting this morning.

Can you process and **validate the delivery orders** that are ready to be shipped today?  
Make sure that the one from **Azure Interior** is shipped.

You

Okay, I'll check this right away!



# Deliver to Customer

6



Inventory

## Delivery Orders

⋮

1 TO PROCESS

Reference

Contact

Status

WH/OUT/00001



Azure Interior, Brandon

Ready

VALIDATE

Immediate Transfer? You have not recorded *done* under quantities yet, by clicking on *apply* Odoo will process all the quantities.

APPLY

DRAFT

WAITING

READY

DONE

i

Odoo reserves products automatically based on quantities on hand. However, even if you don't have enough stock you can force the transfer. If you choose this method, the stock might become negative until you fix the issue.



Buy & Sell

# Invoice Customer

7



Anita • Accountant

Can you **invoice** the sales **orders** we have delivered?  
I'd like to invoice everything before the end of the month.

You



I'm on it!



# Invoice Customer

7



Sales

To Invoice ▶ Orders to Invoice

Number

Customer

Total

Invoice Status

S00001



Azure Interior, Brandon

\$ 759.00

To invoice

CREATE INVOICE

Create Invoice

 Regular invoice

The other options "Down payment" allow you to invoice only a part of the invoice (i.e. 20% or 500€).

CREATE AND VIEW INVOICE

Product

Quantity

Price

Taxes

Subtotal

Large Desk

3.00

220.00

(Tax 15.00%)

\$ 660.00

Untaxed amount: \$ 660.00

Tax 15%: \$ 99.00

Total: \$ 759.00

CONFIRM

DRAFT

POSTED



Buy & Sell

# Record Payment

8

Inbox (1)

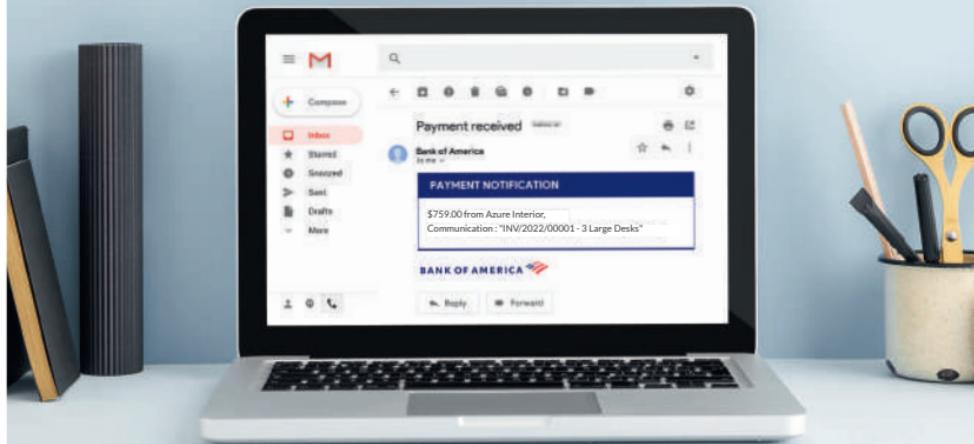


**PAYMENT NOTIFICATION**  
**\$759.00 from Azure Interior**  
Communication: "INV/2022/00001 - 3 large desks"

You



Let's **register this payment** in the invoice.



# Record Payment

8



Accounting

Customers ▶ Invoices

Customer

Total

Payment status

Status

Azure Interior, Brandon



\$ 759.00

Not paid

Posted

REGISTER PAYMENT

Journal

Bank

Amount

\$759.00



Amount and Journal can be different, it depends on the taxes and currency of your country. Add the total of the invoice for Amount.

CREATE PAYMENT

DRAFT

POSTED



Instead of recording payments manually, you can synchronize your bank with Odoo (it supports integration with 35,000 banks), or import bank statement files. Reconciliation becomes much faster as matches are suggested automatically.



Buy & Sell

# Analyze Profits

9

You



Can you tell me the net profit of this year?  
I need it for a board meeting tomorrow.



Anita • Accountant

Let me check the **Profit & Loss report**.



# Analyze Profits

9



Accounting

Reporting ▶ Profit &amp; Loss

If you are looking for a specific feature, start typing letters on the Home screen to search across all menus. Try "Profit".



i

	Continental	Anglo-saxon	Anglo-saxon w/ perpetual valuation
<b>Income</b>	660.00 €	\$ 660.00	\$ 360.00
► <b>Operating Income</b>	660.00 €	\$ 660.00	\$ 660.00
Cost of Revenue			- \$ 300.00
<b>Expenses</b>	1000.00 €		
<b>Expenses</b>	1000.00 €		
<b>Depreciation</b>			
<b>Net Profit</b>	- 340.00 €	\$ 660.00	\$ 360.00

i

Depending on your national principles for accounting (Continental or Anglo-Saxon), you should have a net profit of - €340 or + \$660. In Continental accounting, the expense is recorded at the time of the purchase. While in Anglo-Saxon accounting, the expense is recorded once the goods are sold (in the Cost of Revenue account).

## Congratulations!



What's next? Choose your strategy:

### Run a Store

Start selling in your showroom.

### Manufacture

Build your own products.

### Sell Services

Target new customer segments.

### Sell Online

Create an eCommerce website.



# Run a Store

To grow your business, you plan to launch a showroom for B2B customers, as well as a shop for B2C customers, where they can test and buy products directly.

**Install the Point of Sale app.**

**Import** Products

1

**Configure** Cash Control

2

**Sell** 3 LED Lamps

3

**Cash Out** Money

4

**Sell** with an Invoice

5

**Return** 1 LED Lamp

6

**Control** Cash

7

**Analyze** the PoS Sales

8



# Run a Store



Apps



## Point of Sale

User-friendly PoS interface for shops and restaurants

INSTALL



In the application Point of Sale > Configuration > Payment Methods, you can add other payment methods, such as credit cards.



Point of Sale

# Import your Products

1

You



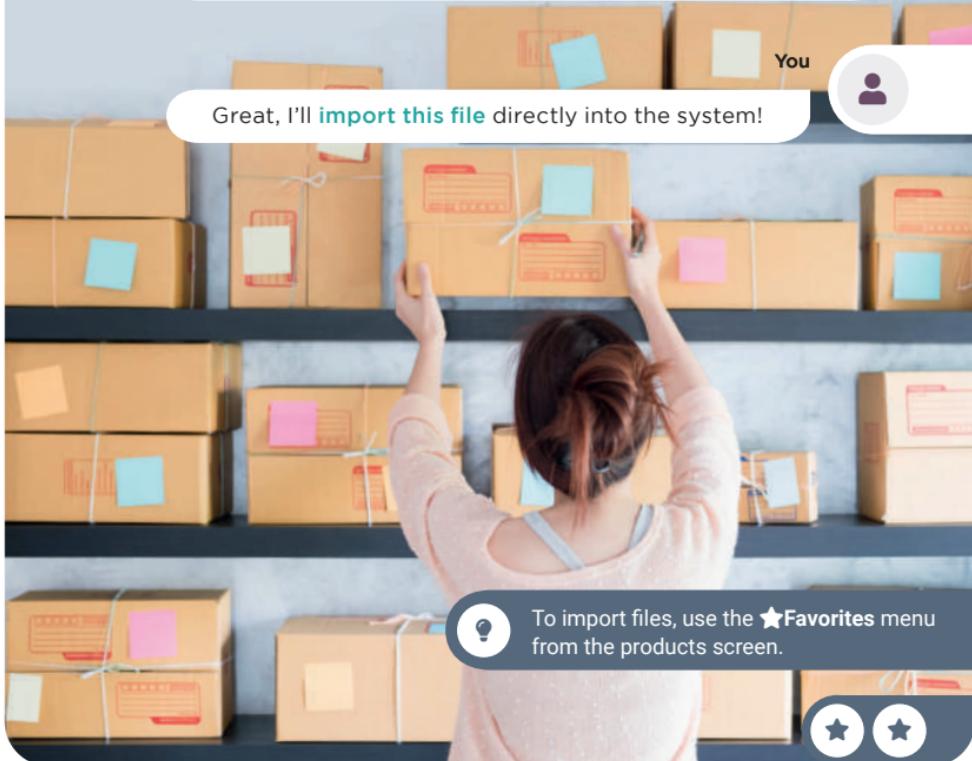
Roger, I'd like to sell products in the showroom.

Can you give me a list of the accessories we can easily sell on-site?



Roger • Inventory Manager

Sure, no problem, here's the document with all product accessories information: [www.odoo.com/r/pos-products](http://www.odoo.com/r/pos-products)



Great, I'll **import this file** directly into the system!



To import files, use the ★Favorites menu from the products screen.



# Import your Products

1



Point of Sale

Product ▶ Products

★ Favorites

UPLOAD FILE

Import records

Select the file POS\_products.xls you downloaded on [www.odoo.com/r/pos-products](http://www.odoo.com/r/pos-products)**Imported file** POS\_Products Use first row as header

## File Column Odoo Field

## External ID

product\_template\_1

ID Externe



## Name

Acoustic Block Screens

Name

**IMPORT**

You can set categories on the product form, to structure how products are organized in the point of sale.



General Information

Variants

Point of Sales

**Category**

Desks



Categories can help you find products faster thanks to the top navigation bar on the POS interface.



Desks

Office Supplies

Miscellaneous



Point of Sale

# Configure Cash Control

2

You



Anita, I'm opening the shop. I'll need some cash for the **Opening balance**. Do you have some?



Anita • Accountant

Sure. I can give you \$550.

You



Great! I'm **opening a new session** with this.



# Configure Cash Control

2



Point of Sale

Dashboard

NEW SESSION

## OPENING CASH CONTROL

Opening cash

550



Open session



You can use the icon to avoid calculating the amount available. Simply add the number of banknotes and coins you have for each value.



The Notes field allows you to add extra information. Any notes created will reappear at the closing of a Point of Sale session.



Point of Sale

# Sell 3 LED Lamps

3



Mike • Customer

I love these **LED Lamps**. I'll **buy 3** right away!

You

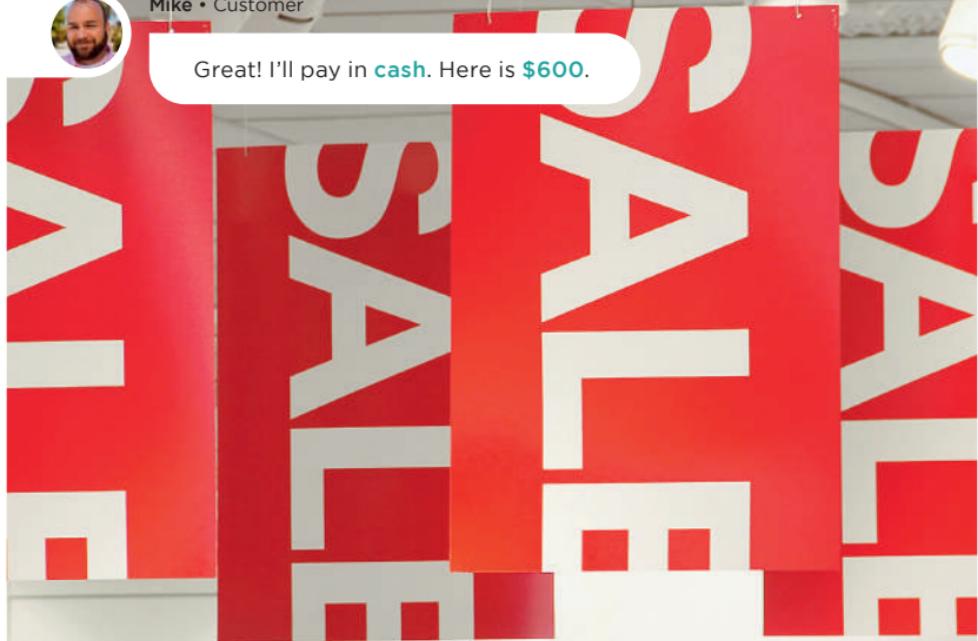


Good! With today's special offer, when buying 2 identical items, you **get a 20% discount** on both.



Mike • Customer

Great! I'll pay in **cash**. Here is **\$600**.



# Sell 3 LED Lamps

3

## LED Lamp

\$ 320.00

2.00 Unit(s) at \$ 200.00 / Unit

With a 20% discount

## LED Lamp

\$ 200.00

1.00 Unit(s) at \$ 200.00 / Unit

\$ 200.00



LED Lamp

**Total: \$ 598.00**

Taxes: \$ 78.00



Customer

1

2

3

Qty

4

5

6

Disc



7

8

9

Price

+/-

0

.

✖

Payment

Cash

600.00



**Validate »**



If your database's country has higher tax rates, the cash amount that you'll have to input will be over 600.



You can also add products in the POS by scanning the barcode.



Point of Sale

# Cash Out Money

4



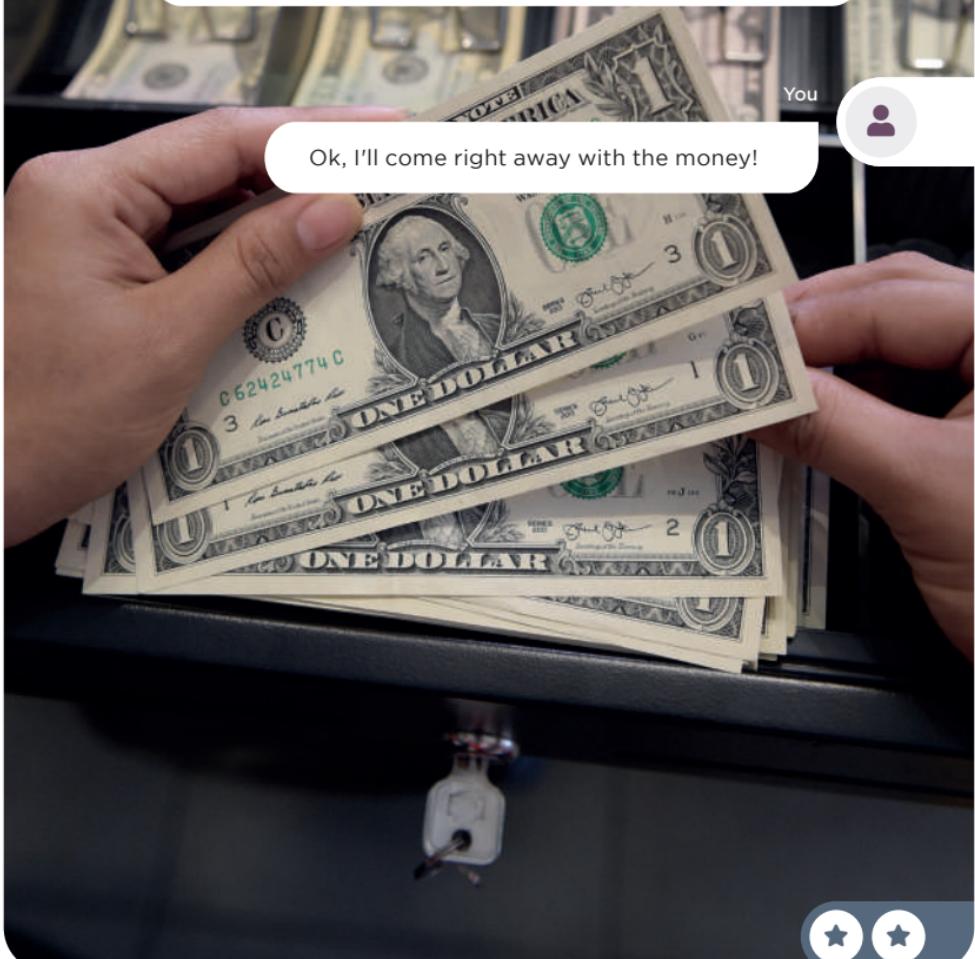
Anita • Accountant

It's Lunch time! Your sandwich has just arrived!

The delivery guy is here and I'm **\$12** short to pay the order. Can you help me out with a **Cash Out**?

Ok, I'll come right away with the money!

You



# Cash Out Money

4

## Cash in/out

-12 \$

Sandwiches Anita



If a printer is connected, the system will print a receipt for each amount that has been cashed out.



You can continue selling even if you are disconnected from the internet. The system keeps all sales in memory and syncs them once it gets back online.



Close



Close



Close



Point of Sale

# Sell with an Invoice

5



Jennie • Customer

Hi, I'll take this **whiteboard**.  
Is it possible to get an **invoice**?

You



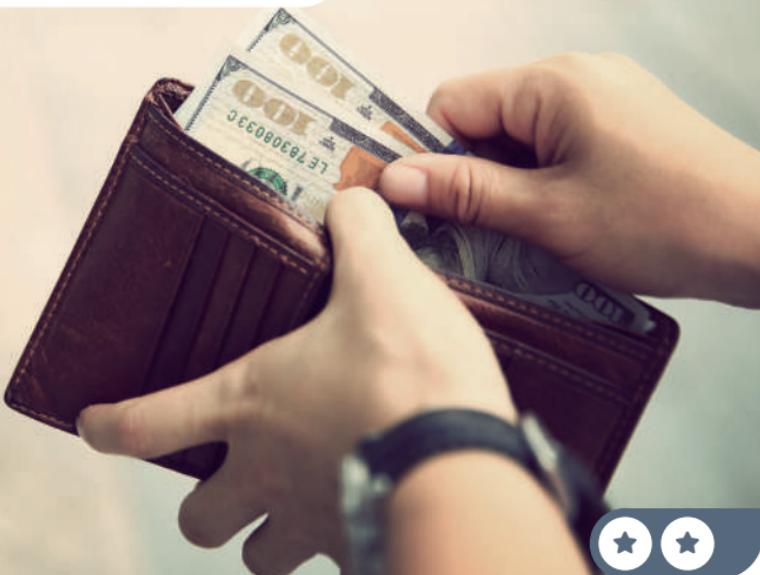
Sure. Can I have your name, address  
and phone number, please?



Jennie • Customer

Yes, my name is **Jennie Fletcher, 3202 Hannah Street,**  
**Asheville NC 28801.** My phone number is **(443)-648-9155.**

I'll **pay cash**. Here is \$200.



# Sell with an Invoice

5



Customer

▶ Create



Jennie Fletcher

Street

3202 Hannah Street

Country

United States

City

Asheville

Email

jennie@example.com

Postcode

28801

Phone

(443)-648-9155

State

North Carolina

▶ Save

\$ 100.00



Whiteboard



Payment

Cash

Cash

200.00



Jennie Fletcher

Validate »

Change \$ 85.00



If you click on 'Print Receipt' the invoice is printed (or by default, downloaded).



Point of Sale

# Return 1 LED Lamp

6



Mike • Customer

Hi, I came this morning and bought 3 LED Lamps. But actually, I don't need this one.  
**Can I return it?**

You

Sure, no problem!



# Return 1 LED Lamp

6

[New Order »](#)[Refund](#)

Receipt Number

Total

Status

Order 00001-001-  
0002

\$ 115.00

Paid

Order 00001-001-  
0001

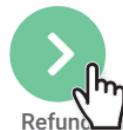
\$ 598.00

Paid

**LED Lamp****\$ 230.00**

1,00 Unité(s) à 200,00 € / Unité(s)

1	2	3	Qty
4	5	6	Disc
7	8	9	Price
+/-	0	.	✖



Payment

Cash

-230,00

[Validate »](#)

Point of Sale

# Control Cash

7

You



Dave, I have to go. Can you close the shop and calculate the **Closing Balance**?  
You'll need to add all the coins and bills you have in the register drawer.

Dave • Showroom Salesman



I'm on it!!





Close

## CLOSING CONTROL

Total 3 orders	\$ 483.00	Money details:
Payments	\$ 483.00	- 10 x \$ 1.00 - 2 x \$ 5.00 - 1x \$ 10.00

Payment Method	Expected	Counted
Cash	\$ 1,021.00	<u>1 021</u>
Opening	\$ 550.00	
- Sandwiches	\$ 12.00	
+ Payment in Cash	\$ 483.00	

Close Session

You started this session with **\$ 550**. Then you sold 3 lamps and the white board (**\$ 598 + \$ 115**), helped Anita out (**\$ -12**) and refunded one lamp (**\$ -230**). You should have a total of **\$ 1,021.00**. Figures might change depending on the taxes in your country.



Point of Sale

# Analyze the PoS Sales

8



Anita • Accountant

So how was your day?  
Are you happy with the results?

You



Difficult to say, I'll check the **Sales Details**.



# Analyze the PoS sales

8



Point of Sale

Reporting ▶ Sales Details

## Sales Details

Start Date

Yesterday's date



End Date

Today's date

**PRINT**

## Sales Details

### Products

Products	Quantity	Price Unit
[FURN_0003] LED Lamp	0.0	200.0
[FURN_0003] LED Lamp	2.0	200.0 Disc: 20%
[FURN_009] Whiteboard	1.0	100.0

### Payments

Name	Total
Cash	483.00

### Taxes

Name	Tax Amount	Base Amount
Tax 15.00%	63.00	420.00

**Total: 483.00**

# Sell Online

Locally, the MyOffice brand is recognized for its quality and service. It's time to go global and establish a web presence to showcase your great products. You plan to setup an eCommerce store where customers can view your catalog, customize products, buy online and track their orders.

**Install the eCommerce App** and configure an "Online shop" for an office furniture business.

**Design** your Homepage

1

**Create** a Product

2

**Improve** SEO

3

**Set up** a Product Configurator

4

**Test** your eCommerce

5

**Upsell** Customers

6

**Write** a Blog Post

7



# Sell Online



Apps



eCommerce

Sell your products online

INSTALL



Let's do it

I want an online store for my  
furniture accessories supplier business  
with the main objective to develop the brand.



You can choose a pre-made Palette.



News



Blogging and posting

Build my website



Select your favorite theme.



Sell Online

# Design your Homepage

1

You



I'm launching our new website. Any idea what we should put on our homepage?

 Sophia • Sales Manager

I like websites with a **cover at the top**, customized with an office image as the background.

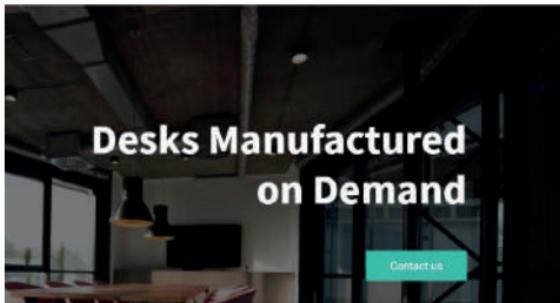
I would put some key numbers like: **700+ happy customers, 35 employees, 120+ designed products, and 4 year guarantee.**

Then, we can add 3 columns: "**You Customize**", "**We Design**", and "**We Manufacture**".



# Design your Homepage

1



When searching for an image, Odoo suggests illustrations and pictures free of charge.

Search an image



## BLOCKS

45 91

Numbers

Background



**You Customize**  
To your unique pieces and its last piece of the order, no pressure put. In the even of the project, the hours of revision, his definitely... it is committed, without cost.

**We design**  
Whether it is to help you have directly shot project, to confirm a choice or when you have no idea about the layout of your interior, our adviser's one theme to:

**We manufacture**  
Every week our shop receive new products. Since we only make for a limited period of time.

## BLOCKS

≡ ≡

Columns

## Image

Transform



Flexible

1:1

✓ APPLY

Save



If the slider is on "Published", your page is online. You can test it on your smartphone when it's online!

Published



+ New

Edit



Sell Online

# Create a Product

2



Sophia • Sales Manager

Love the new website! Can we start selling our new **Office Chairs** online?

You



Ok, I'll **create the product page** on the website with a **\$120 price tag**.



# Create a Product

2

+ New



Page



Product



Blog Post

## New Product

x

Product Name:

Office Chair

Create

1 Upload an image



2 Set the price

\$ 120.00

Save

All Products > Office Chair

Search...



### Office Chair

\$ 120.00

- 1 +

Add to Cart



Sell Online

# Improve SEO

3



Sophia • Sales Manager

Hi, there have been no sales for our new office chairs online. Can we do some **Search Engine Optimization (SEO)**?

You



I'll target **keywords** people are looking for on Google, with the **promote** tool.

The smartphone screen displays a comprehensive digital marketing dashboard:

- Right now:** 642 active users on site.
- Top Referrals:**

Source	Active Users
phab.com	4
avalanche.com	3
applicationtraining.com	2
getnewleads.com	2
mail-pump.com	1
- Top Social Traffic:**

Source	Active Users
Facebook	2
LinkedIn	1
- Top Keywords:**

Keyword	Active Users
best price	200
office chair	2
http://www.office.com	1
office	1
new office chairs	1
- Top Pages:** A line chart showing page views over time.
- Top Active Pages:**

Active Page	Active Users
1	100%
2	10%
3	5%
4	3%
5	2%
6	1%
7	1%
8	1%
9	1%
10	1%
11	1%
12	1%
13	1%
14	1%
15	1%
16	1%
17	1%
18	1%
19	1%
20	1%
- Top Locations:** A map showing active user locations with Brussels highlighted.



# Improve SEO

3

Website

Promote

Optimize SEO

Title ?

Office Chair On Sale | MyOffice Inc.

Custom Url ?

/shop/ office-chair

Keywords

office chair

English (US) ▾

Add

Preview

Office Chair On Sale | MyOffice Inc.

myoffice.odoo.com/shop/office-chair-on-sale  
Get the best office chairs for sale,  
buy online now.

Keyword

H1

H2 T D C

Related keywords

office chair



office chairs near me

office chairs on sale



Most “office chair” searches on Google are related to “Office Chair On Sale”.  
By narrowing your target to these keywords, you should attract more visitors.

Office Chair On Sale | MyOff



myoffice-inc.odoo.com/shop/product/office-chair-on-sale-32

Website

Published

Edit

All Products > Office Chair

Search...



Office Chair

\$ 120.00



Try to target the same keywords as the title of your page, the URL and the product name. If you change the product name, the URL is updated accordingly, but you can choose to keep the initial product name in the URL thanks to the “Custom Url” feature.

Bonus Point • Check if your product is published in the top-right corner, otherwise, visitors can not access the page.

You get an extra ★ if you thought about publishing it.

Published



Sell Online

# Set up a Product Configurator

4



Sophia • Sales Manager

The chairs are selling like crazy. Good job!  
But people are asking for different colors and sizes.

You



Ok, I will **activate the variants** feature  
and **configure it on the chair product**.

What are the options?



Sophia • Sales Manager

They come in **4 colors** (grey, black, white, purple),  
and **3 sizes** (Small, Medium, Large). We can also offer  
a **custom embroidery**, with their name on it.



# Set up a Product Configurator

4



Sales

Configuration ▶ Settings

## Product Catalog



### Variants

Sell variants of a product using attributes (size, color, etc.)

SAVE



Sales

Products ▶ Products

Office Chair

EDIT

## Office Chair

General Information

Attributes & Variants

Sales

### Attribute

### Values

Size

Small

Medium

Large

Color

Grey

White

Black

Purple

Attribute Name

Color

Display Type

Color

Embroidery



Custom

No embroidery

Attribute Name

Embroidery

Display Type

Select

Variants Creation Mode

Never (option)

Attribute Values

Value

Is custom Value

No embroidery



Custom



Sell Online

# Test your eCommerce

5

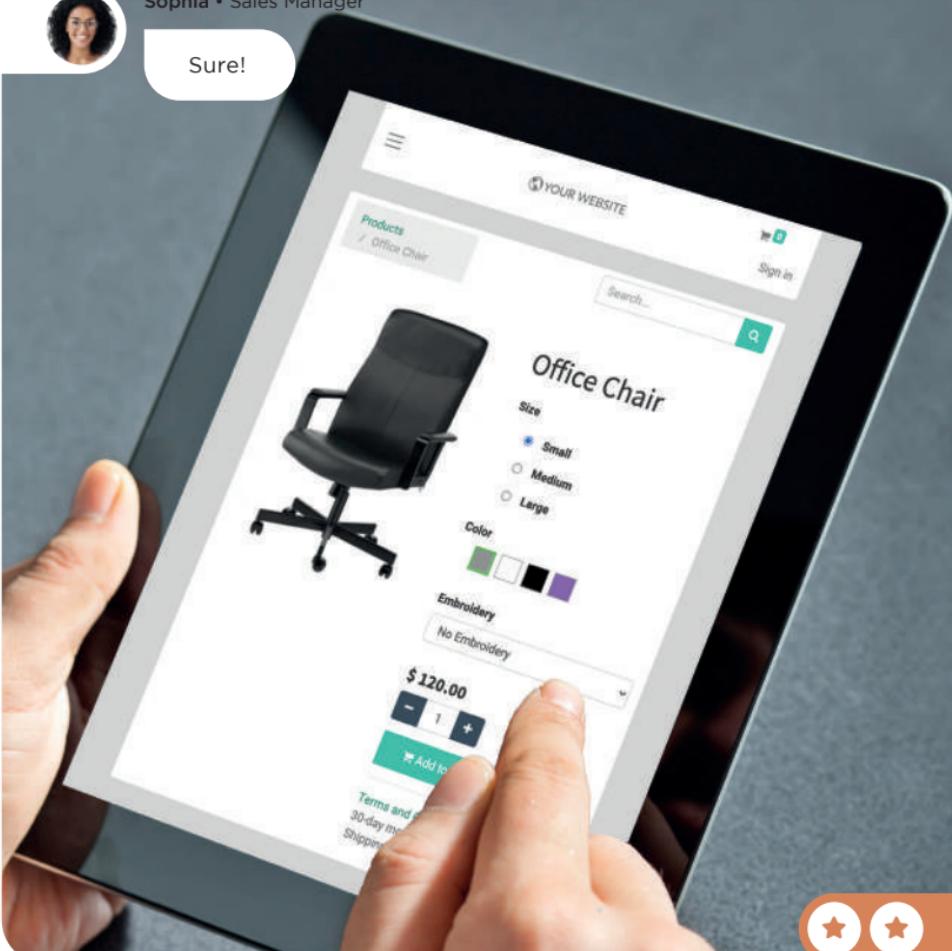
You



Our eCommerce is ready.  
Can you **test buying a product** online?

Sophia • Sales Manager

Sure!



# Testing your eCommerce

5



Go to  
Website



## Office Chair

\$ 120.00

SIZE

Small    Medium    Large

COLOR



EMBROIDERY

No Embroidery

- 1 +

Add to Cart



Review Order

Address

Confirm Order

Product	Quantity	Price
Office Chair Embroidery: No embroidery	1	\$ 120.00

- 1 +

\$ 120.00

Subtotal: \$ 120.00

Taxes: \$ 18.00

Total: \$ 138.00

Process Checkout >



Process Checkout



Review Order



Address



Confirm Order



By default, only the "Wire Transfer" payment method is activated. Don't forget to edit your bank account information using . You can also activate Paypal, or any credit card, by configuring one of the available payment acquirers (Stripe, Authorize.net, Ingenico, etc.)



Sell Online

# Upsell Customers

6



Sophia • Sales Manager

Last month, we made \$350k in revenue through the website, with an average cart size of \$250. Can we upsell customers by proposing **options**?

You



Yes, let's **create a new product "Warranty"** that will be as an **option for the chair**. The warranty will be valid for **3 years** and cost **\$50**.



# Upsell Customers

6

Website

eCommerce

Products

CREATE

## ★ Warranty: 3 years

General Information

Variants

Sales

eCommerce

Product Type Service

Sales Price \$50

## Products / Warranty: 3 years



You can reach the previous screen by using the *breadcrumb*. It works better than using your browsers' *back* and *forward* arrows.



Office Chair

Price: \$ 120.00



General Information

Variants

Sales

eCommerce

Optional Products

Warranty: 3 years



Once the product is set up, test it by adding a chair to your cart. You should see a popup offering you the option for a warranty. You can use this mechanism to do a multi-level product configuration, as the optional product (the warranty) can have options and variants too.



Sell Online

# Write a Blog Post

7



Sophia • Sales Manager

I love the new warranty service. It would be great to write a news article about it.

You



Ok, I'll [setup a blog](#) on our website and [write the first post](#).



# Write a Blog Post

7

Website

GO TO WEBSITE

+ New



Page



Product



Blog Post

## New Blog Post

x

Select Blog

News



Create



To set a cover for your blog, click on the title then click on the icon next to the "Background" option.

Home Shop News Contact us

YourLogo

≡

Contact Us

Discover our 3-year warranty

A large background image showing a close-up of two people's hands shaking. The text 'Discover our 3-year warranty' is overlaid on the bottom left of the image.

All Blogs / News / Discover our 3-year warranty

An extension of the warranty to enjoy your furniture even more!



# Sell Services

As your business grows, more and more companies come to you to furnish their new offices. As a response to this, you decide to launch an internal Office Design service, to help your customers evaluate their needs. For this project, you'll work with Audrey, an interior designer who creates designs for your prospects.

**Install the Apps** required for the following business flow and **configure your own email servers** in the **General settings**.

**Set up** a Project

1

**Create** a Task

2

**Perform** the Job

3

**Configure** a Product

4

**Sell** the Design Service

5

**Record** Timesheet

6

**Invoice** Customer

7



# Install the Apps



Apps



Instead of installing apps one by one, you can switch to the list view in the apps screen. Then check multiple apps and install them all at once using the top menu

Action



<input type="checkbox"/>	Module Name	Author	Website
<input checked="" type="checkbox"/>	Project	Odoo S.A.	<a href="https://www.odoo.com/app/project">https://www.odoo.com/app/project</a>
<input checked="" type="checkbox"/>	Timesheets	Odoo S.A.	<a href="https://www.odoo.com/app/timesheet">https://www.odoo.com/app/timesheet</a>



Settings



General Settings

## Discuss



### Custom Email Servers

Configure your own email servers

Alias Domain @mycompany.com

**SAVE**



Sell Services

# Set up a Project

1

You



I'll **create the project "Office Design"** to structure our services. What are the steps involved in designing an office?



Audrey • Interior Designer

It starts with an on-site **meeting** to check their office and gather info, then I prepare 3 **design proposals**.

Based on their feedback, I model a **floor plan**, then a sales rep creates the **quotation** with the new products.

You



Ok thanks. I'll **create the stages** and set the email address "**design@**" on the project, to ease the creation of tasks.



# Set up a Project

1



Project

CREATE

Project Name

Office Design

Timesheets



Create tasks by  
sending an email to

design

@myoffice.odoo.com

CREATE



If you send an email to the above email address, a task will be created automatically in this project.

Meeting



+ Design



Floor Plan



Quotation



Done

ADD

See examples



If you make a mistake when naming a stage, click on the that appears when you hover your cursor over the column title. From there, you can rename or remove the stage. You can also easily restructure the process over time using drag & drop on columns.



Sell Services

# Create a Task

2



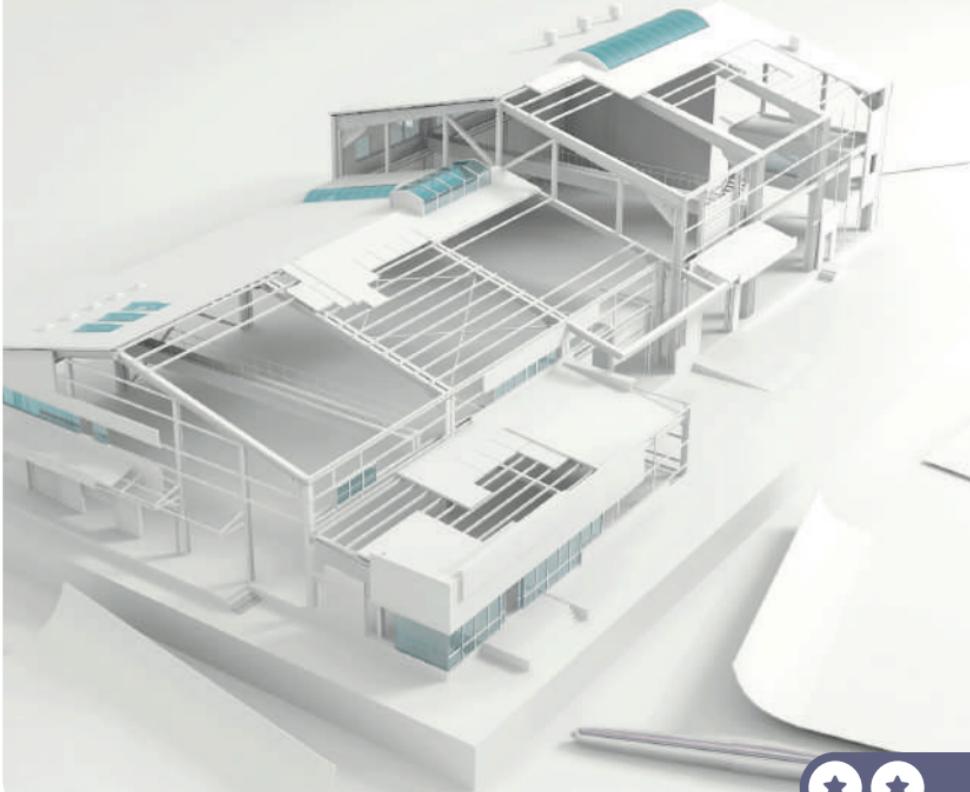
Sophia • Sales Manager

*Boogle asked us to design their new office in New York.*

You



**Send an email** to "design@yourdomainname.odoo.com" with subject "**Boogle NY**" to create a task for Audrey.



# Create a Task

2



From your personal Inbox

New Message

To [design@yourdomainname.odoo.com](mailto:design@yourdomainname.odoo.com) X Cc Bcc

Subject Boogle NY

Hi Audrey,

Boogle in New York just signed!  
Here's a picture of their office they'd like to redesign.

Thanks!

**boogle-old-office.jpg (101K)**

Send A U ↪ 😊 📁 🖼



You'll find your domain name in the navigation bar of your browser.



<https://yourdomainname.odoo.com/web>



When sending an email to the project, you can attach photos or provide a description. These will automatically be attached to the new task.



Sell Services

# Perform the Job

3

You



Audrey, you should have a new task for “Boogle NY” under the Office Design project. Can you prioritize it?



Audrey • Interior Manager

Ok, I'll **star the task** for priority.

I will be **scheduling a meeting** with the customer next week. Once my meeting is done, I'll work on the design proposal.



# Perform the Job

3



Project

## ★ Office Design

✉ design@myoffice-inc.odoo.com

⋮

1 Tasks

Meeting

+

1

Boogle NY

⋮



Schedule activities to help you get things done.

+ SCHEDULE AN ACTIVITY

i

Click on ⚡ to mark the task as:

● Ready for the Next Stage

● Blocked

Activity Type Meeting

▼

Summary Visit Boogle's Office

OPEN CALENDAR



Sell Services

# Configure a Product

4



Sophia • Sales Manager

I think it's a mistake to offer our Office Design service for free. If we sell it, customers will better understand the value of Audrey's work.

You



You're right. We can sell this service at **\$50 per hour**.

I'll **create a product "Office Design Service"** that you can use in your quotations. I'll **configure it** to generate tasks for every sales order.



# Configure a Product

4



Sales

Products ➔ Products

CREATE

## ★ Office Design Service

 Can be Sold Can be Purchased

General Information

Variants

Sales

Accounting

Product Type Service

Sales Price \$50



If Product Type is set as Service, the sales order can generate a task or a project. It helps you organize your service activities according to what has been sold.

Invoicing policy

Based on Timesheets

Create on Order

Task

Project

Office Design

Unit of Measure

Hours



**Bonus Point** • You could have set Project & Task or Project in Create on Order. Both are valid options. But you get an extra ★ if you chose Task. It's more efficient to manage all tasks in the same project as you only have one task per customer to track.



Sell Services

# Sell the Design Service

5



Sophia • Sales Manager

I just confirmed our first quotation for "**The Jackson Group**".

We sold an **Office Design Service**, estimated at **20 hours**.  
The customer loved it and **confirmed the order** right away!

You



Awesome! Check that the task has been  
created automatically for Audrey.



# Sell the Design Service

5



Sales

Orders ▶ Quotations

CREATE

Customer

The Jackson Group

Order Lines

Optional Products

Other Information

Product	Qty	Unit Price	Taxes	Subtotal
Office Design Service	20.000	50.00	15%	\$ 1,000.00
Untaxed Amount:				\$ 1,000.00
Tax 15%:				\$ 150.00
Total:				\$ 1,150.00

CONFIRM

QUOTATION

QUOTATION SENT

SALES ORDER



Links to the Project (and to the task) have been included on the sales order, in the top right corner.



1 Projects



1 Tasks



Sell Services

# Record Timesheet

6

You



Audrey, as we charge customers based on hours spent, don't forget to record your **timesheet on tasks with the "Start" button.**

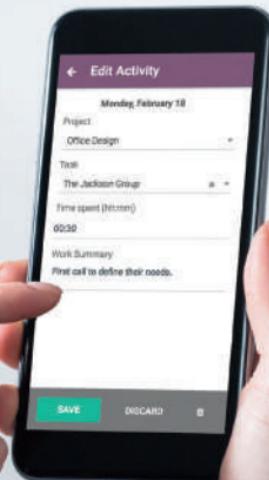


**Audrey** • Interior Manager • 32 minutes ago

Hold on, I'm on the phone with The Jackson Group.

**Audrey** • Interior Manager • Now

Ok, I've just started to work on the design for The Jackson Group. I'll log the time spent.



# Record Timesheet

6



Timesheet

▶ START

00:28:24

■ STOP

Design

Office Design

▼ S00002 : Office Design S...

▼

Mon,	Tue,	Wed,	Thu,
a Office Design / S00002: Office De...	0:00	0:00	0:30
		0:30	0:00

**i** By default, time is rounded up by the quarter. You can change this in the Settings menu.

**i** There are many ways to record timesheets: directly from the task, via the mobile app: "Awesome Timesheet" or via the "Start" button at the top of the grid. All methods provide the same result.



Sell Services

# Invoice Customer

7

Anita • Accountant



Can you check if we still have **sales orders to invoice**?  
I'd like to invoice everything before the end of the month.

You



I will **create the draft invoices**, check it and **validate** it.

The screenshot shows the Xero Accounting software interface. The top navigation bar includes 'Accounting', 'Banking', 'Invoicing', 'Sales', 'Purchases', 'Reporting', 'Marketing', and 'Tools & Integrations'. The main dashboard has sections for 'Sales' and 'Purchases'. The 'Sales' section shows 117 invoices to validate and 800 unpaid invoices. The 'Purchases' section shows 17 bills to validate, 181 bills to pay, and 24 expenses to process. Below these are two detailed transaction reports for ING BE15 3631 0709 4104 and ING BE10003107094104, each showing a timeline of payments and a balance statement.



# Invoice Customer

7



Sales

To Invoice ▶ Orders to Invoice

Number	Customer	Total	Invoice Status
S00002 	The Jackson Group	\$ 1150.00	To invoice

CREATE INVOICE

Create Invoice  Regular invoice

CREATE AND VIEW INVOICE

Product	Quantity	Price	Taxes	Subtotal
Office Design Service	0.50	50.00	15.00%	\$ 25.00

CONFIRM



DRAFT

POSTED



This button takes you directly on the timesheet.



0 Hours Recorded



# Manufacture

Your business is booming! MyOffice is now known for its quality products and services. But lately, you have been feeling the competition from bargain stores, who import their furniture from China. To differentiate yourself, you plan to manufacture your furniture on demand. This way you'll improve your margins, while producing your furniture faster!

**Install the Apps required** to run the following business flow.  
Set-up the **Work Orders** in **Settings**.

**Define** the Bill of Materials

1

**Purchase** Raw Materials

2

**Receive** Products

3

**Manufacture** 3 Tables

4

**Set up** Operations & Work Centers

5

**Plan** a Manufacturing Order

6

**Add** a Quality Check

7

**Check** Your Quality Test

8

**Control** Cost

9



# Manufacture



Apps



## Manufacturing

Manufacturing Orders & BOMs

INSTALL



Apps



## Quality

Control the quality of your products

INSTALL



Manufacturing

Configuration ▶ Settings

## Operations



### Work Orders

Process operations at specific work centers.

SAVE



Manufacture

# Define the Bill of Materials

1



Ronnie • Head of Engineering

Hi, we just finished the plans to manufacture the new **Table**. Can you review them?

You

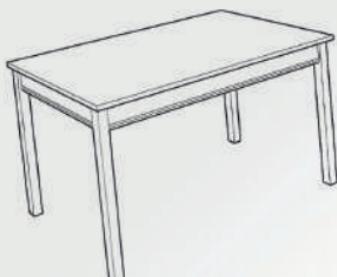


Looks good!

I'll **create the 4 products** in the system (the Table and its components), as well as the **Bill of Materials**, according to your plan.

Product Table - Cost Price 115\$ - Sales Price 330\$

Products	Quantity	Cost Price
Table Top	1	40 \$
Table Leg	4	12 \$
Bolt	4	0.50 \$



# Define the Bill of Materials

1



Manufacturing

Products ➤ Products

CREATE

## ★ Table

General Information

Sales

Purchase

Inventory

Product Type

Storable Product ▾

Sales Price

\$ 330.00

Cost

\$ 115.00



Cost is generally the sum of the components (\$90) plus the assembly costs.

General Information

Sales

Purchase

Inventory

Routes



Manufacture



0

Bill of Materials

CREATE

The BoM is also accessible  
in the menu *Products ➤ Bills of  
Materials*

Product

Table ▾

BoM Type



Manufacture this product

Quantity

1.00

Component

Quantity

Table Top

1.00

Table Leg

4.00

Bolt

4.00



Manufacture

# Purchase Raw Materials

2

You



Hi, can you send me a quotation for **100 table tops, 400 table legs, and 400 bolts?**



Only Woods Inc. • Sales Representative

Sure. Here is our offer.

You



Sounds good, I'll **send you** the **purchase order** by email.

✉ info@companyname.com  
📍 Dummy Road 125x  
Street Location: City Area  
+00 1234 5678 9012  
+00 1234 5678 9012

Only Woods

Offer 2022/01/23  
Request for Quotation PO00100  
Expected date  
01/02/2022 12:30:26  
01/02/2022 12:30:24  
01/02/2022 12:30:24



Description  
10H\_0522] Table Top  
2339] Table Leg  
177 Bolt



# Purchase Raw Materials

2



Purchase

CREATE

Vendor Only Woods Inc.

Products

Other Information

Product	Quantity	Unit Price	Taxes	Subtotal	
Table Top	100	40.00	(Tax 15.00%)	\$ 4,000.00	
Table Leg	400	12.00	(Tax 15.00%)	\$ 4,800.00	
Bolt	400	0.50	(Tax 15.00%)	\$ 200.00	
Untaxed amount:					\$ 9,000.00
Tax 15%:					\$ 1,350.00
Total:					\$ 10,350.00



Taxes depend on countries. Depending on the accounting package installed, you won't have the same tax percentage as the one in the example.

CONFIRM ORDER



RFQ

RFQ SENT

PURCHASE ORDER

SEND PO BY EMAIL



Manufacture

# Receive Products

3



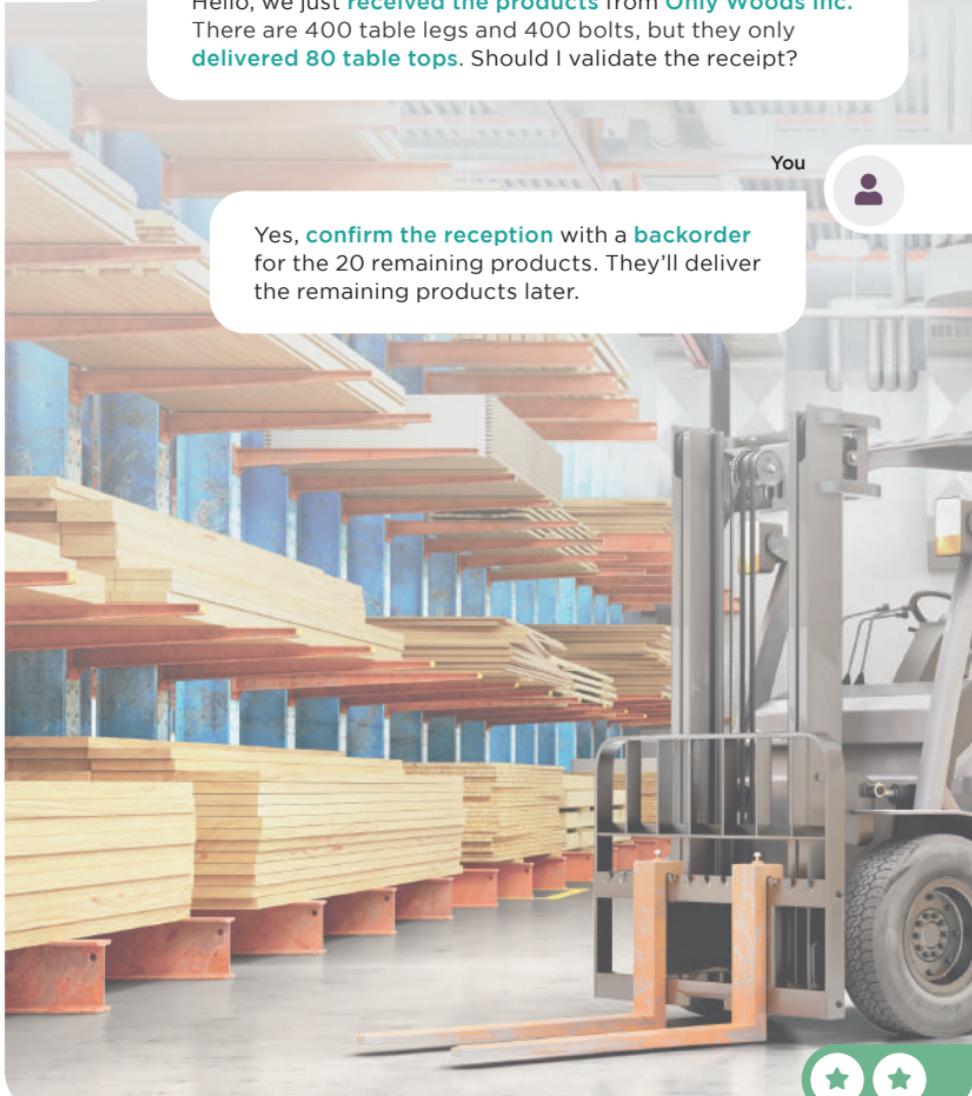
Randall • Inventory Officer

Hello, we just **received the products** from **Only Woods Inc.** There are 400 table legs and 400 bolts, but they only **delivered 80 table tops**. Should I validate the receipt?

You



Yes, **confirm the reception** with a **backorder** for the 20 remaining products. They'll deliver the remaining products later.



# Receive Products

3



Inventory

## Receipts

⋮

1 TO PROCESS



Another way to confirm the reception is to click on the Receipt button on the purchase order.



1

Receipt

Reference

Contact

Source Document

Status

WH/IN/00002



Only Wood Inc.

P00002

Ready

## WH/IN/0002

Partner

Only Wood Inc. ▾

Source Document

P00002

Operations

Additional Info

Note

Product

Initial Demand

Done

Table Top

100.000

80.000

Table Leg

400.000

400.000

Bolt

400.000

400.000

VALIDATE

DRAFT

WAITING

READY

DONE

You have processed less products than the initial demand.

CREATE BACKORDER



Manufacture

# Manufacture 3 Tables

4

You

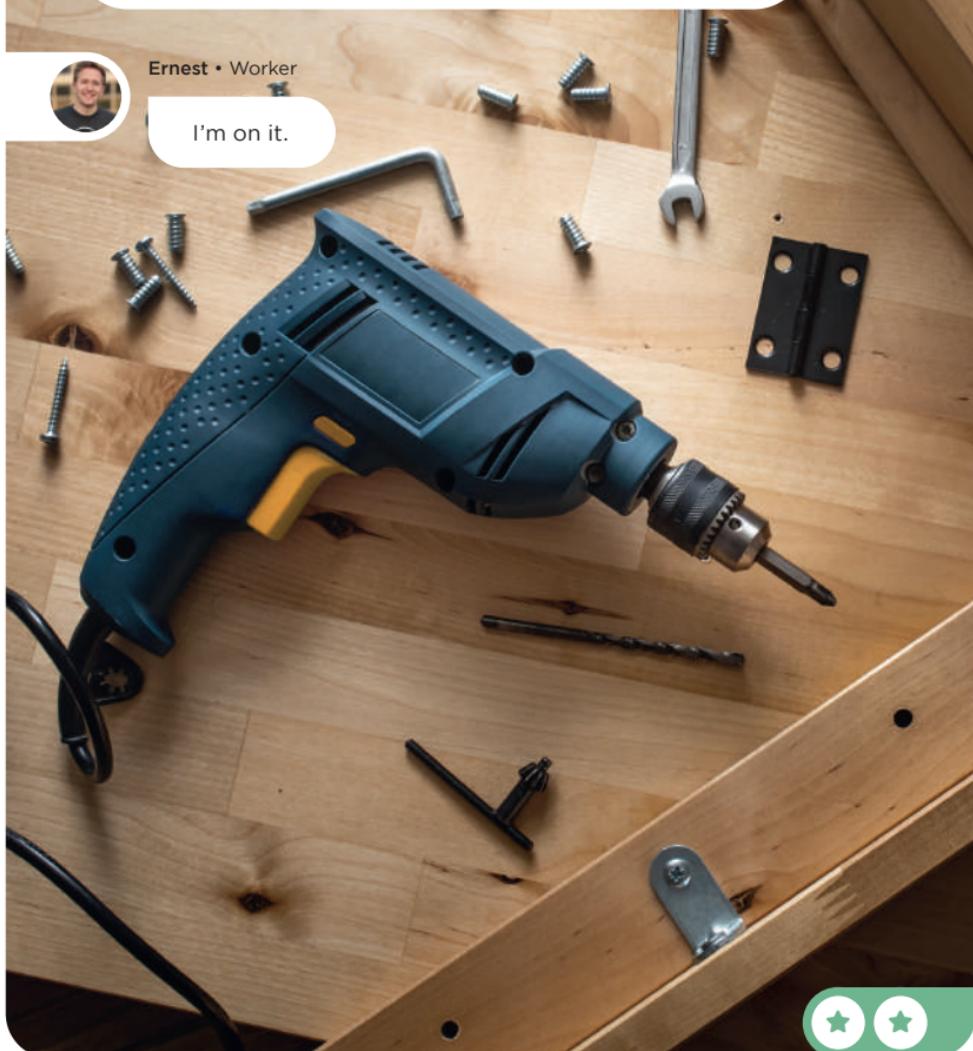


Ernest, we got all the materials we need to start producing desks. Can you **manufacture 3 tables** for the showroom?



Ernest • Worker

I'm on it.



# Manufacture 3 Tables

4



Manufacturing

Operations ▶ Manufacturing Orders

CREATE

Product

Table

Bill of Material

Table

Quantity

3.00

Units

To Produce

CONFIRM

CONFIRMED

IN PROGRESS

DONE

Quantity

3.00

/ 3.00

Units

To Produce

Components

Work Orders

Miscellaneous

Product

To Consume

Reserved

Consumed

Table Top

3.00 / 3.00

3.00



3.00

Table Leg

12.00 / 12.00

12.00



12.00

Bolt

12.00 / 12.00

12.00



12.00

MARK AS DONE

CONFIRMED

IN PROGRESS

DONE



Manufacture

# Operations & Work Center

5



Sharlene • Manufacturing Engineer

I plan to organize the manufacturing line by creating **2 work centers of 60 min each: Assembly Station and Painting Room**. Can we put a tablet with instructions on each station?

You



Sounds like a good idea. I'll **create the 2 operations: Assembly and Painting from the table's Bill of Materials.**



Sharlene • Manufacturing Engineer

Thanks. I created this document to help our workers:  
<http://odoo.com/r/worksheet>  
Can you **upload this worksheet to the assembly operation?**



# Operations & Work Center

5



Manufacturing

Products ➤ Bills of Materials

Product	BoM Type
Table	Manufacture this product

Components      Operations      Miscellaneous

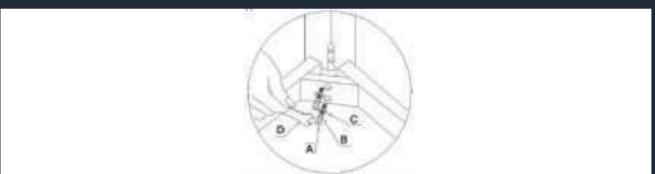
Operation

Add a line

Operation      Assembly

Work Center      Assembly Station ▾

Work Sheet



SAVE & NEW



Repeat for the Operation "Painting" with the work center "Painting Room".



Manufacture

# Plan an Order

6

You



Sharlene, our operations are set up. We can **create** and **confirm** a **manufacturing order** for the table.

When it's **confirmed**, operations become available on the tablet at each work station.

Sharlene • Manufacturing Engineer

I'll **test the work center control panel** at the same time.



# Plan an Order

6



Manufacturing

Operations ▶ Manufacturing Orders

CREATE

Product

Table

Quantity

1.00

Units

To Produce

Bill of Materials

Table

CONFIRM

DRAFT

CONFIRMED

IN PROGRESS

DONE



Manufacturing

Overview

Assembly Station

⋮

WORK ORDERS

WH/MO/00002 - Assembly

Table 1.00 Unit(s)



Table: 1.00

/1.00 Unit(s)

WH/MO/00002-Assembly

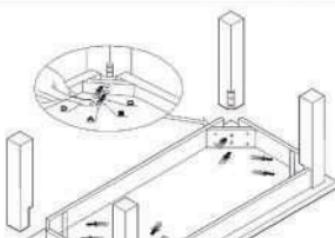


Pause

◀ Previous

Skip ➞

✓ MARK AS DONE



Continue the production by working on the order related to the Painting work center and mark it as done.



Manufacture

# Add a Quality Check

7



Rachel • After Sales Services

Hi, we've got 5 customers complaining about a defect in their table. Looks like the table top separates from the legs after a few months.

You



It's probably related to the bolts. I will [create a Control Point in Quality Control](#) on the [Assembly](#) operation to measure the [torque](#).

We will ensure that the measurement stays [between 11.00 and 15.00 Nm](#).



# Add a Quality Check

7



Quality

Quality Control ➤ Control Points

CREATE

## New

Title

Torque Setting

Control Frequency

All



In Control Frequency, you can choose if the control point has to be done on each operation, randomly or periodically.

Products

Table X

Operations

MyOff.: Manufact. X

Type

Measure

Work Order  
Operation

Assembly

Norm

13.00

Nm

Tolerance

from 11.00 to 15.00

Worksheet

Scroll to specific page

Worksheet  
Page

3



"Scroll to specific page" allows you to designate the right page of the worksheet when it's time to perform quality control.

SAVE



If you install the IoT App, you can send the measurement automatically from the connected device to Odoo.



Manufacture

# Check your Quality Test

8

You



Sharlene, I added a control point  
on the assembly operation.

Sharlene • Manufacturing Engineer



That's good, we have to [create a new table](#).  
We will have the opportunity to test it on the  
Control Panel through the [work orders](#) with [the tablet view](#).

You



FYI, the torque setting measurement  
should be between 11 and 15 Nm.



# Check your Quality Test

8



Manufacturing

Operations &gt; Manufacturing Orders

CREATE

Product

Table

Quantity to Produce

1.00

Units

To Produce

Bill of Material

Table

CONFIRM

DRAFT

CONFIRMED

IN PROGRESS

DONE



Manufacturing

Operations &gt; Work Orders

Operation

Manufacturing

Status

Assembly

WH/IN/00003

Ready

Start

Block



Painting

WH/IN/00003

Waiting for ano ...

Start

Block



Measure: 14.00

Nm

VALIDATE

✓ MARK AS DONE

Table - Units

Date	Operator	Title	Result	Status
01/18/2022 14:57:01	Admin	Torque Setting	14 Nm	Done



Manufacture

# Control Cost

9



Anita • Accountant

To close my fiscal year, I need to know the cost of the table we manufacture, including time and materials.

You



Ok, I'll check the **Structure & Cost** on the Bill of Materials for theoretical costs if you want to update it.



# Control Cost

9



Manufacturing

Products ➔ Bills of Materials

 Product

BoM Type

 Table

Manufacture this product



Structure &amp; Cost

## BoM Structure & Cost

Product	BoM	Quantity	Product Cost	BoM Cost
Table	Table	1.000	\$ 115.00	\$ 90.00
Table Top		1.000	\$ 40.00	\$ 40.00
Table Leg		4.000	\$ 48.00	\$ 48.00
Bolt		4.000	\$ 2.00	\$ 2.00
▶ Operations		62:27		\$ 0.00
			Unit Cost	\$ 115.00
				\$ 90.00



As Anita doesn't have the user access rights for Manufacturing, you can send her a document with the details of the BoM.

Click on **PRINT** and a pdf will automatically be downloaded.



# Use Barcodes

To speed up your inventory operations, you plan to use barcode scanners in the warehouse. With barcodes, your team will pick products faster and more accurately. **Install the Barcode app.**

This game requires any USB barcode scanner, or a phone with the Odoo Mobile app installed. You can download it in the Apple store or the Google Play Store. Connect to your database via your smartphone to continue the game.

**Configure** the Barcode Scanner

1

**Set up** your Product

2

**Receive** Products

3

**Sell** Products

4

**Deliver** Products

5

**Adjust** Inventory

6

**Define** Locations

7

**Move** Products

8



# Use Barcodes



Apps



## Barcode

Use barcode scanners to process logistics operations.

INSTALL



You can also install the feature by going to Inventory > Settings.



All the barcodes needed for the following exercises are here.

Keep this card near you.



WH-RECEIPTS



DESK12345678



O-BTN.validate



O-CMD.MAIN-MENU



O-BTN.pack



WH-STOCK



ZONEA



ZONEB



Use Barcodes

# Configure the Scanner

1



Paul • Secretary

Hey, we received the USB barcode scanner you ordered last week.

You



Thanks. I'll **configure it** according to my keyboard.



Paul • Secretary

**Scan** any barcode in a text editor to make sure it works.



# Configure the Scanner

1



If you don't have a barcode scanner, you can use your smartphone.

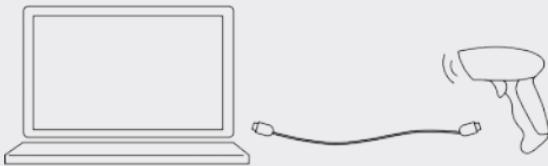
For this, install the Odoo mobile app (available on Google Play and the Apple Store) on your phone and connect to your edu- database, so that you can play using your computer and smartphone in parallel.

Note that you'll need to authorize the Odoo app to use your camera when you hit the "Tap to Scan" button or the barcode at the top of the purple menu.

Also, if your phone's camera has a wide angle, hide the barcodes you don't need with another card to avoid scanning the wrong barcode.

1

Plug the barcode scanner into your computer.



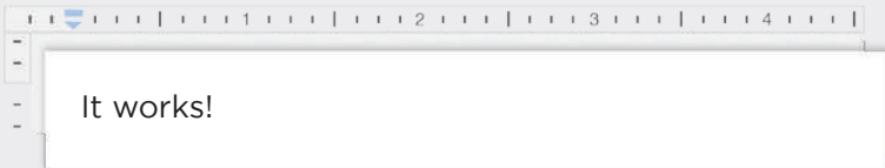
2

As the barcode scanner syncs with the keyboard, open any text editor to test it. **Scan the following barcode** to check the settings.  
With a smartphone, use any barcode or QR code scanner.



3

If the scanner is configured properly, it should type "It works!" in the editor.



If you see different characters, have a look at the manual for your barcode scanner. You might need to scan special barcodes to configure it to your keyboard.



Use Barcodes

# Set up your Product

2

You



Sharlene, I plan to use a barcode scanner to speed up inventory moves.

Can you **add the barcode references** to our products?

Sharlene • Manufacturing Engineer



Ok, I've added the barcode reference **DESK12345678** to the **Large Desk**.



A close-up photograph of a barcode sticker. The barcode is oriented vertically. To its right, the numbers '12345678' are printed vertically. The background is slightly blurred.



# Set up your Product

2



Inventory

Products ► Products



## Large Desk

Price: \$ 220.00

On hand: 7.00 Units



Product Name

★ Large Desk

General Information

Variants

Sales

Purchase

Inventory

Product Type

Storable Product

Sales Price

\$220.00

Cost

\$140.00

Barcode

DESK12345678



The barcode reference must perfectly match **DESK12345678** (uppercase letters, no space), otherwise the barcode scanner might not recognize the product.



Use Barcodes

# Receive Products

3

Incoming Call...



Hello, I'm the driver from Wood Corner.

I have **3 Large Desks** for you. I'll be at your warehouse in 5 minutes. Can you open a loading dock?

You



Ok, go to dock 3. I'll **create the receipt** with my barcode scanner.



# Receive Products

3



Barcode

- 1 Initiate a receipt.



WH-RECEIPTS

- 2 Scan the product, 3 times.



DESK12345678

- 3 Validate the transaction.



O-BTN.validate



You can also add more quantities of a product by tapping on

+1



Use Barcodes

# Sell Products

4



Brandon • Customer

Hi, **Brandon from Azure Interior** speaking. I'd like to **buy 3 large desks**. Can you send me the order?

You



I'll send it to you right now! Your email address is still [brandon@game.odoo.com](mailto:brandon@game.odoo.com), right ?



Brandon • Customer

That's correct!



# Sell Products

4



Sales

Orders ▶ Quotations

CREATE

Customer

Azure Interior, Brandon



Order Lines

Optional Products

Other Info

Product

Quantity

Unit Price

Taxes

Total

Large Desk

3.00

220.00

15.00%

\$ 660.00

[Add a product](#)[Add a section](#)[Add a note](#)

Untaxed Amount: \$ 561.00

Taxes: \$ 99.00

Total: \$ 660.00

[SEND BY EMAIL](#)

QUOTATION

QUOTATION SENT

SALES ORDER

[CONFIRM](#)

QUOTATION

QUOTATION SENT

SALES ORDER



Use Barcodes

# Deliver Products

5



Sophia • Sales Manager

Hi, can you **deliver Azure Interior's order**?  
It's a high priority.

I'm not sure it will fit in one **package**.  
You'll need to **activate the option**.

You



Ok, I'll continue the **operation** by scanning the products  
and the operation barcodes.

The 3 desks didn't fit in one pack. I've put **2 desks  
in one pack**, and the **last one in another**.



# Deliver Products

5



Inventory

Configuration ▶ Settings

## Operations



Packages

Put your products in packs (e.g. parcels, boxes) and track them

SAVE



Barcode

OPERATIONS

### Delivery Orders

1 TO PROCESS



WH/OUT/00002



Ready

Azure Interior, Brandon



01/15/2022



1



DESK12345678

2



DESK12345678

3



O-BTN.pack

4



DESK12345678

5



O-BTN.pack

6



O-BTN.validate



The “Put in Pack” operation allows you to track individual packages, or pallets, and their products. It helps compute the real cost of shipping, if you use shipping connectors like DHL, Fedex, UPS, etc.



Bonus Point • If you thought about activating the packages management feature, you get an extra ★



Use Barcodes

# Adjust Inventory

6



Roger • Inventory Manager

Hi, the system tells me there are 4 Large Desks on hand. However, I see **only 3** in the warehouse.

You



Ok, let's **make an inventory adjustment**. We probably scraped one of the desks.



# Adjust Inventory

6



Barcode

INVENTORY ADJUSTMENTS

- 1 Scan 3 times



DESK12345678



- 2 Validate the inventory



O-BTN.validate



Use Barcodes

# Define Locations

7



Roger • Inventory Manager

Our average time to pick has increased by 30% compared to last year. As the warehouse gets bigger, workers have to walk more to pick products.

You

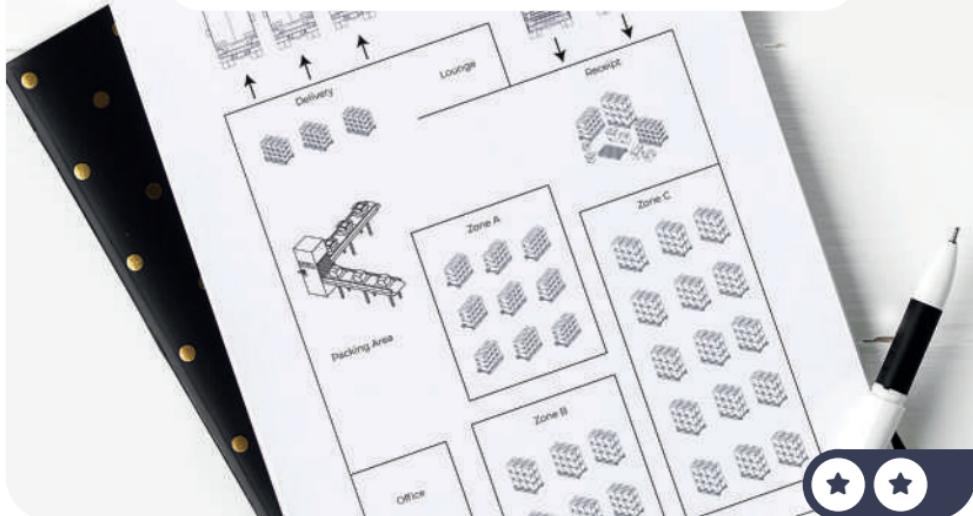


I am going to do an ABC inventory analysis. Frequently sold products should go in ZoneA, closer to the packing zone. Less frequently sold products should go in ZoneC, at the end of the warehouse. Can you **activate the storage location** feature?



Roger • Inventory Manager

Ok. So, I'll divide our main stock (the Parent Location, WH/Stock) into 3 zones. I'll **create these 3 new internal locations: ZoneA, ZoneB, ZoneC** with their respective barcodes: **ZONEA, ZONEB, ZONEC**.



# Define Locations

7



Inventory

Configuration ➤ Settings

## Warehouse



### Storage Locations

Track products location in your warehouse.

SAVE



Inventory

Configuration ➤ Locations

CREATE

### ZoneA

#### Parent Location

WH/Stock



Use internal locations for all locations that belong to you (usually inside your warehouse). The products in those locations are valued in your accounting.

#### Location Type

Internal Location ▾

Barcode ZONEA



Repeat this operation to create the two other locations:

ZoneB • Internal Location • ZONEB

ZoneC • Internal Location • ZONEC



The barcode of a location is usually scanned from the shelf. It's scanned in order to record the spot where products have been taken from and where they'll be moved.



Use Barcodes

# Move Products

8

You



According to my ABC analysis, the desks are the most frequently used.

Can you **move 3 Large Desks (products)** from the location WH-STOCK to ZoneA?

 Sharlene • Manufacturing Engineer

Ok, I'm on it.



# Move Products

8



Barcode

- 1 To start an internal move, scan the source location from the barcode app home.



WH-STOCK

- 2 Then, scan 3 times the products you picked.



DESK12345678

- 3 Next, scan the destination shelf: ZONEA.



ZONEA

- 4 Finally, validate it.



O-BTN.validate



# Create your App

Following the great feedback you received from your Office Design services, you are ambitious and want to go further. So, you plan to rent fully-furnished offices. You already have a few offices, but you need a dedicated app to manage the properties.

**Install the Studio App** to run the following business flow.

**Initialize** your App

1

**Design** Office Form

2

**Manage** Rental Status

3

**Record** your Offices

4

**Improve** the List view

5

**Add** a Kanban view

6

**Create** Statistic Reports

7

**Design** a Report Template

8



# Create your App



Apps



**Studio**

Create and customize your Odoo apps

**INSTALL**



To quickly search for an app, you can use the top-right search bar.



Apps **x**

Studio



Once Odoo Studio is installed, click on this icon to customize any screen of Odoo, whether it's a form, a list or a kanban view.



Admin ▾



Create your App

# Initialize your App

1



Sophia • Sales Manager

We need an app to manage our properties. It's not efficient to do everything in a spreadsheet.

You



I'll **create an Office Rental app** to manage our **Offices**.



Sophia • Sales Manager

Great! I'm looking forward to it!  
Please make sure it has basic info, such as:  
the name, picture, and rental price.



# Initialize your App

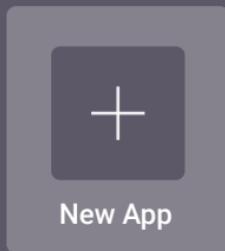
1



Admin ▾



Settings



New App

## Create your App

Choose an app name

Office Rental



## Design your Icon



## Create your first Menu

Choose your first object name

Offices

New model



## Suggested features for your new model



Picture

Attach a picture to a record



Monetary value

Set a price or cost on records

**CREATE YOUR APP ➤**



Create your App

# Design Office Form

2

You



What information do you need on an office form?



Sophia • Sales Manager

As I mentioned, I'll need the **name, photo, and rental price**, but also the **capacity** (number of available desks), **address**, and **type of office (open space or closed space)**.



# Design Office Form

2

VIEWS FORM

+ Add

## New Fields

Nº	Integer
Ab	Text

Nº	Integer
Ab	Text
▼	Selection

Name

Image

Label

Rent

Value

Capacity

0

Address

If you want to use existing contacts for the address, use a *ManyZone* with the relation "Contact", instead of a Text field.

Type

Open Space

Once a field is dropped, you should edit its *Label* in the left menu under "Properties".

i

i



Create your App

# Manage Rental Status

3



Sophia • Sales Manager

I can't believe that you are doing this by yourself !

Could we manage office status :

**Available** ▶ **Leased** ▶ **To renew?**

You



Yes! I can **add a pipeline status bar** to the form.



# Manage Rental Status

3

VIEWS FORM

Add a pipeline status bar



## Field Properties

- |   |           |                                     |  |
|---|-----------|-------------------------------------|--|
| ☰ | Available | <input type="checkbox"/>            |  |
| ☰ | Leased    | <input type="checkbox"/>            |  |
| ☰ | To renew  | <input checked="" type="checkbox"/> |  |



CONFIRM

AVAILABLE

LEASED

TO RENEW

Label

Status

CLOSE



Create your App

# Record your Offices

4

You



Sophia, I created the Office Rental app.  
Can you add our properties in the app?

Sophia • Sales Manager

Ok, I will **create our 3 offices for rent.**

Available \$ 2000

Creekside

645 Creekside Drive  
Open Space • 15 desks

Leased \$ 65000

**Chestnut**

1450, Chestnut Street  
Closed Space • 150 desks

Available \$ 3500

Merriman

4597 Merriman Street  
Open Space • 45 desks



# Record your Offices

4



Office Rental

CREATE

AVAILABLE

LEASED

TO RENEW

## Merriman



Rent	\$3,500.00
Capacity	45
Address	Merriman Street, 4597
Type	Open Space ▾

SAVE

C

Repeat this operation to create the two other offices.

Name	Address	Type	Capacity	Rent	Status
Chestnut	Chestnut Street, 1450	Closed Space	150	65 000	Leased
Creekside	Creekside Drive, 645	Open Space	15	2 000	Available



Create your App

# Improve the List view

5



Sophia • Sales Manager

When browsing the list of offices, it would be useful to have more information, such as the **office type, capacity, price, and status**.

You



Good idea. I'll **add these columns** to the list view.



# Improve the List view

5



Office Rental

Offices



Existing Fields ▶



Type

N°

Capacity



Status

<input type="checkbox"/> Name	Type	Capacity	Rent	
<input type="checkbox"/> Merriman	Open Space	45	3,500.00	
<input type="checkbox"/> Chestnut	Closed Space	150	65,000.00	
<input type="checkbox"/> Creekside	Open Space	15	2,000.00	

CLOSE



When you are customizing a screen with Studio, you can easily switch to other views, using the *Views* tab.



Create your App

# Add a Kanban view

6



Sophia • Sales Manager

Is it possible to have an overview of which offices are available or leased?

You



Yes. I'll **activate a Kanban view** of the offices, **with columns** according to the status field.



# Add a Kanban view

6



Office Rental

Offices

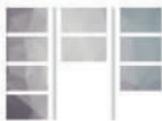


Views



## Multiple Records Views

Activate View



Kanban

View

Default Group by

Status



Add tags

Merriman

Add a Priority

Add an avatar



Create your App

# Create Statistic reports

7

You



Sophia, I'm going to a meeting, do you know how I can show our office occupation rate easily?

Sophia • Sales Manager

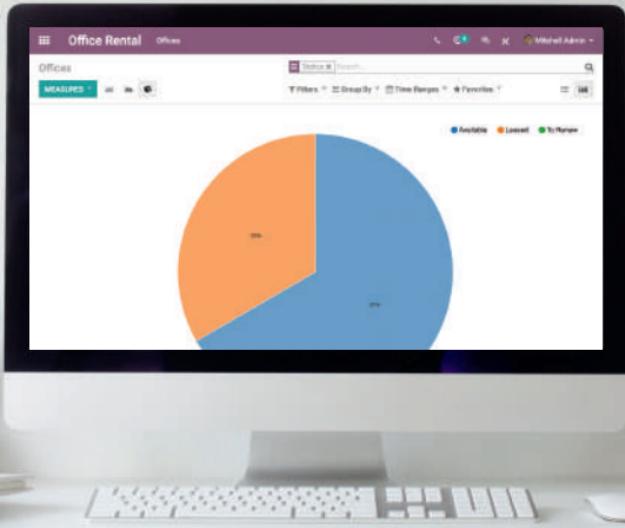


Why don't you [create a graph view?](#)

You



Good idea, I'll get the availability ratio ([percentage of available desks by type](#)).



keep it simple.



# Create Statistic reports

7



Office Rental

Offices



Views



## Reporting Views

ACTIVATE VIEW



Graph

CLOSE

## Offices

MEASURES ▾

✓ Capacity

Rent



☰ Group By ▾

Add Custom Group ▾

Status

APPLY



Bonus Point • You get an extra ★ if you found the following, with measures = Capacity and group by "Status".



Create your App

# Design a Report Template

8



Sophia • Sales Manager

We'd like to publish our available offices in a magazine.

Is it possible to create a display with the **image, name, address, rent, type, and capacity**? Ideally, with a short text **about us** at the bottom of the page?

You



Sure! I'll create the ad for you, directly from the "**Reports**" menu in the app.



Rent  
\$3500.00

Type  
Open Space

Capacity  
45



# Design a Report Template

8



Office Rental

Offices



Views

Reports



CREATE

Blank  
No header/footer

## Block

Field

doc (Offices) > Image

Field

doc (Offices) > Display Name



Heading1



Field

doc (Offices) > Address

Field & Label

Rent

Type

Capacity

Title Block

About MyOffice Inc.

Text

We are a team of passionate people whose goal is to improve everyone's life through disruptive products. We build great products to solve your business problems.



To print a report, click on **PRINT** in the top right corner .

PRINT

