

SCALE UP!



The Business Game

odoo



Your Story

“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.

A month later, the 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 others 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 life!



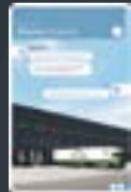


Game Rules

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

1

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



2

Do the business process online, on 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 up cards front side up if you found the solution before looking at the back (even if you did it differently), or 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 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



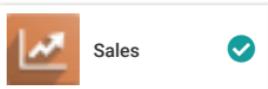
https://www.odoo.com



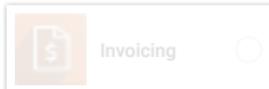
Start Now. It's Free



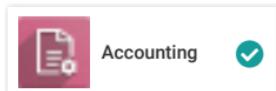
CRM



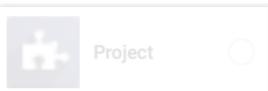
Sales



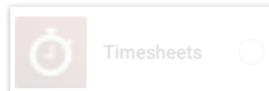
Invoicing



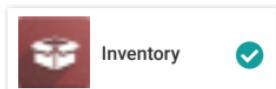
Accounting



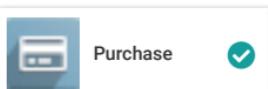
Project



Timesheets



Inventory



Purchase



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

Configure >

Company Name

MyOffice Inc.

myoffice-inc.odoo.com

Country

United States



If your company name starts with 'edu-', the database will exist for 10 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.

Start now >

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?



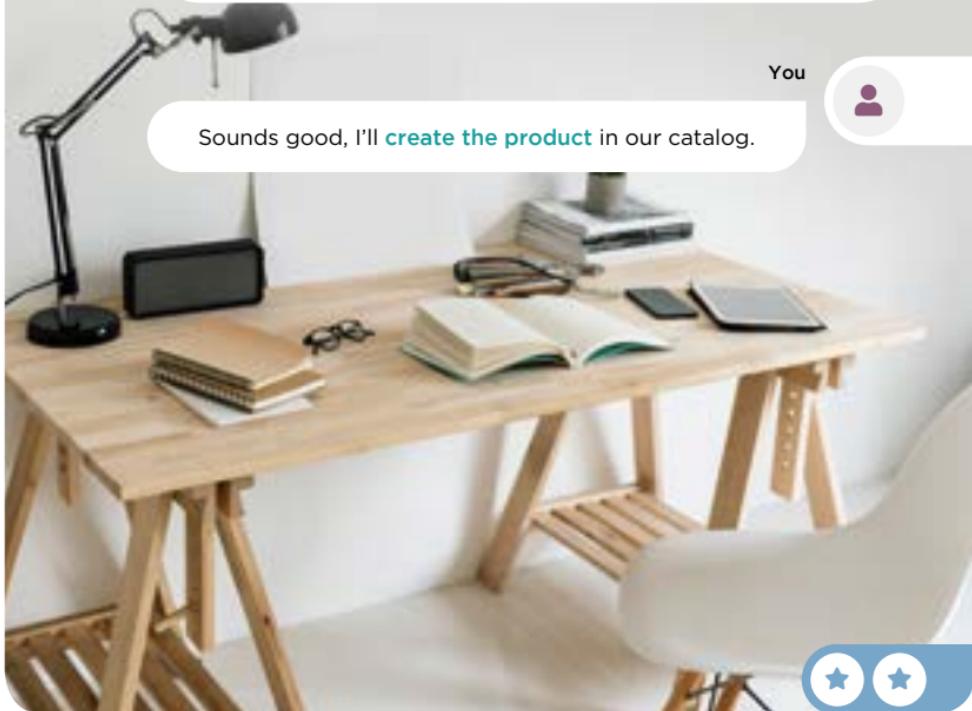
Marc • Purchase Manager

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 > Products

CREATE

Product Name

Large Desk

General Information

Sales

Purchase

Product Type **Storable Product**

Sales Price **220.00**



Services: No inventory management

Storable: Send, receive and track inventory

Consumable: Send & receive - No inventory count

Cost **\$ 140.00** [Update Cost](#)



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

General Information

Sales

Purchase

Vendor

Quantity

Price

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 10 items

2



Purchase

Orders ➔ Request 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 localization, 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

My Company

⋮

1 TO PROCESS

Reference

Contact

Status

WH/IN/00001



Wood Corner

Ready

EDIT

WH/IN/00001

Receive From

Wood Corner

Source Document

PO00001

Operations

Additional Info

Note

Product

Demand

Done

Large Desk

10.000

10.000



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

VALIDATE

DRAFT

WAITING

READY

DONE



Buy & Sell

Control the Bill

4

Paul • Secretary

Hi, 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 2020/0123

Description	Quantity	Unit Price	Amount
Large Desk	10.000	\$ 110.00	\$ 1,100.00
<hr/>			Subtotal \$ 1,100.00
<hr/>			Tax \$ 165.00
<hr/>			Total \$ 1,265.00

Please use the following communication for your payment:
INV/2020/0123

Payment terms: **2 months**



Control the Bill

4



Accounting

Vendors ▶ Bills

CREATE

Vendor

Wood Corner

Auto-Complete

Select a purchase order

PO0001: \$ 1000.00

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

POST

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 "BILL/2019/0001"



Hello, on your invoice 2019/0123, 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

Brandon

Order Lines

Optional Products

Other Information

Product Quantity Unit Price Taxes Subtotal

Large Desk 3.000 \$ 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 from if you sent the email to brandon@game.odoo.com. Click .

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

My Company

⋮

1 TO PROCESS

Reference

WH/OUT/00001



Contact

Azure Interior, Brandon

Status

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 chose this method, the stock might become negative until you fix the issue.



Buy & Sell

Invoice Customer

7



Anita • Accountant

Can you validate which **sales orders** we need **to invoice**? 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

Quotation Nbr	Customer	Total	Invoice Status
---------------	----------	-------	----------------

SO001	Azure Interior, Brandon	\$ 759.00	To Invoice
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[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	3.000	220.00	15.00%	\$ 660.00
------------	-------	--------	--------	-----------

Untaxed amount: \$ 660.00

Tax: \$ 99.00

Total: \$ 759.00

[POST](#)

DRAFT

POSTED



Buy & Sell

Record Payment

8

Inbox (1)



PAYMENT NOTIFICATION

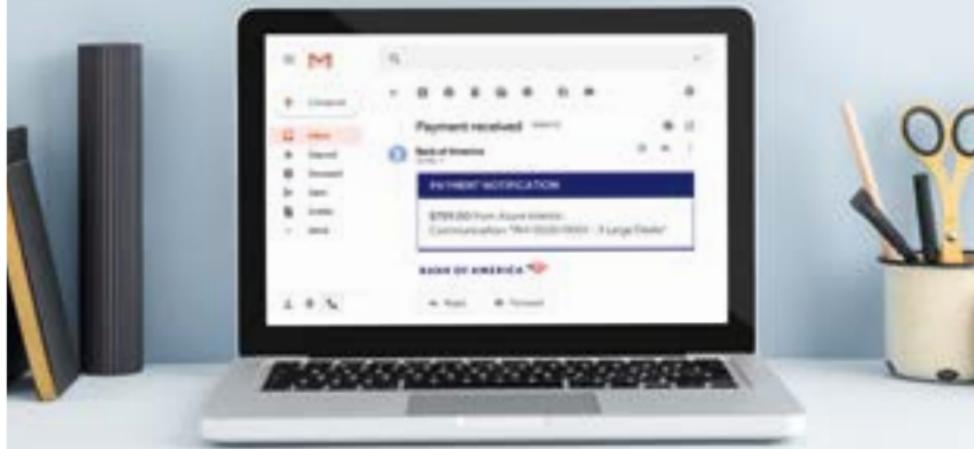
\$759.00 from Azure Interior

Communication: "INV/2020/0001 - 3 large desks"

You



Let's [register this payment](#) in the invoice.



Record Payment

8



Accounting

Customers ▶ Invoices

Customer	Invoice Date	Total	Status
Azure Interior, Brandon	01/04/2020	\$ 759.00	Posted

REGISTER PAYMENT

Amount	759.00
Journal	Bank (USD) ▾



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

VALIDATE

DRAFT

OPEN

PAID



Instead of recording payments manually, you can synchronize your bank with Odoo (it supports integration with 24.000 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 & Loss

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



i

	Continental	Anglo-saxon	Anglo-saxon w/ perpetual valuation
Income	660.00 €	\$ 660.00	\$ 360.00
Operating Income	660.00 €	\$ 660.00	\$ 660.00
Cost of Revenue	0.00 €	\$ 0.00	-\$ 300.00
Expenses	1000.00 €	\$ 0.00	\$ 0.00
Expenses	1000.00 €	\$ 0.00	\$ 0.00
Depreciation	0.00 €	\$ 0.00	\$ 0.00
Net Profit	- 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.

Sell Services

Target new customer segments.

Manufacture

Build your own products.

Sell Online

Create an eCommerce website.



Run a Store

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

Install the Point of Sale app and configure the Shop by adding the possibility to **create invoices.**

Import Products

1

Sell 3 LED Lamps

2

Close Session

3

Configure Cash Control

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

Tablet POS: shops and restaurants



INSTALL



Point of Sale

Configuration ▶ Point of Sale

Point of Sale Name

Shop 

Bills & Receipts



Invoicing

Print invoices on customer request



In the configuration screen, you can also 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?



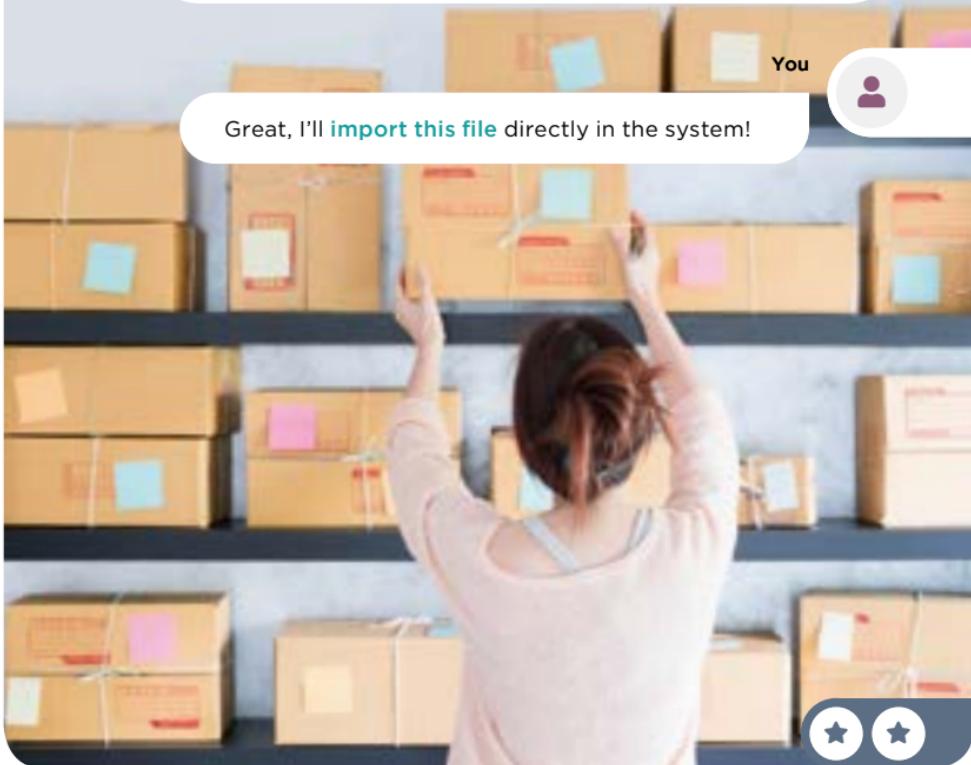
Roger • Inventory Manager

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

You



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



Import your Products

1



Point of Sale

Product ▶ Products

IMPORT

Select the file POS_products.xls you downloaded on www.odoo.com/r/pos-products

LOAD FILE

Map your columns to import

 The first row contains the label of the column

External ID	Name	Product Type	...
External ID X ▼	Name X ▼	Product Type X ▼	...
product_template_1	Acoustic Block Screens	Storable Product	...

IMPORT

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



General Information

Variants

Sales

Category

Chairs



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



Search Products

Chairs

Desks

Miscellaneous



Point of Sale

Sell 3 LED Lamps

2



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 the two



Mike • Customer

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



Sell 3 LED Lamps

2



Point of Sale

NEW SESSION

LED Lamp

\$ 320.00

2.000 Unit(s) at \$ 200.00 / Unit(s)

With a 20% discount

LED Lamp

\$ 200.00

1.000 Unit(s) at \$ 200.00 / Unit(s)

1

01:10

+



Total: \$ 598.00

Taxes: \$ 78.00

\$ 113.50



LED Lamp



Customer

1

2

3

Qty

4

5

6

Disc



7

8

9

Price

Payment

+/-

0

.

✖

Due

598.00

Tendered

600.00

Change

2.00

Method

Cash (USD)



Cash (USD)

Validate »



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



Point of Sale

Close Session

3



Anita • Accountant

I've got a question for you, can you come over please?

You



We're closing the shop.

I'll **close my POS session** and be there in a minute.

SORRY
WE ARE
CLOSED
PLEASE COME BACK AGAIN



Close Session

3



Shop



RESUME

CLOSE



VALIDATE CLOSING & POST ENTRIES

OPENING CONTROL

IN PROGRESS

CLOSING CONTROL

CLOSED & POSTED



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.



Point of Sale

Configure Cash Control

4



Anita • Accountant

How do you plan to control the cash from your register?

You

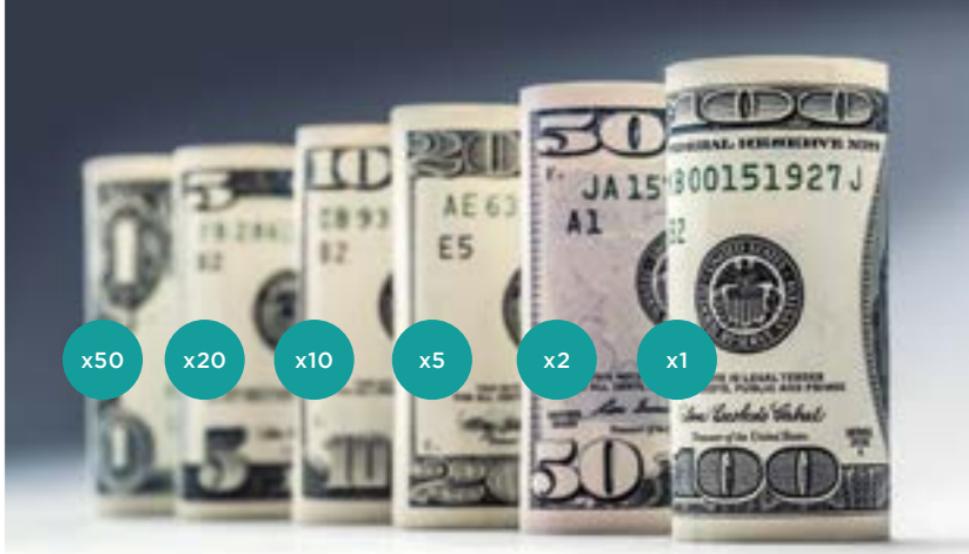


There's a functionality in Odoo PoS. I'll **configure the option**. But then I'll need some cash to **Set the Opening balance** when I **open a new session**. Do you have some?



Anita • Accountant

Sure. I can give you \$550.



Configure Cash Control

4



Point of Sale

Configuration ➔ Point of Sale

 Point of Sale Name Shop 

Payments

 Cash Control

Control cash box at opening and closing



You can set a Default Opening balance and record the bills and coins you'll always have each time you open a new session.



Point of Sale

Dashboard

NEW SESSION



Set Opening Balance

#Coins/Bills

Coin/Bill Value

Subtotal

50

1.00

50.00

20

5.00

100.00

Add a line



Add all the bills as shown on the front of the card.

CONFIRM

OPEN SESSION

OPENING CONTROL

IN PROGRESS

CLOSING CONTROL

CONTINUE SELLING



Point of Sale

Sell with an Invoice

5



Lorraine • Customer

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

You



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



Lorraine • Customer

Yes, my name is **Lorraine Douglas, 3202 Hannah Street,
Asheville NC 28801**. Phone is **(443)-648-9155**.

I'll **pay cash**, here is \$200.



Sell with an Invoice

5



Customer



Lorraine Douglas

Street 3202 Hannah Street

Email lorraine@example.com

City Asheville

Phone (443)-648-9155

Postcode 28801

Country United States



Set Customer

\$ 100.00



Whiteboard



Payment

Cash (USD)

Due

115.00

Tendered

200.00

Change

85.00

Method

Cash (USD)



Invoice

Validate »



Point of Sale

Return 1 LED Lamp

6



Mike • Customer

Hi, I came yesterday and bought 3 LED Lamps.
I don't need this one, [can I return it?](#)

You



Sure, no problem!



Return 1 LED Lamp

6

[Next Order »](#)

1 01:10 +

LED Lamp \$ -200.00
-1.000 Unit(s) at \$ 200.00 / Unit(s)

Total: \$ -230.00
Taxes: \$ -30.00



\$ 200.00
LED Lamp



You need to enter -1 for the quantity while the product line is selected.

+/-

1



Payment

Due	Tendered	Change	Method
-230.00	0.00	230.00	Cash (USD) 

[Validate »](#)



Don't try to cancel the original receipt in the back-end. It's not a good practice (a cashier rarely does it this way), and it's not even legal in some countries.



Point of Sale

Control Cash

7

You



Dave, don't forget to **set the Closing Balance**. You'll need to add all the coins and bills you have in the register drawer.

Dave • Showroom Salesman

Yes, I will!



Control Cash

7



Shop

⋮

RESUME

CLOSE

A white rectangular box containing a 'Shop' header, a 'RESUME' button, and a 'CLOSE' button. A hand cursor is positioned over the 'CLOSE' button.

Set Closing Balance

CONFIRM



Theoretical Closing Balance = \$435. You started with \$550. Then added \$115 by selling the whiteboard. But when reimbursing the Lamp at \$230, you have \$435 left (= \$665 - \$230). Your numbers might change depending on the taxes of your country.

Starting Cash: **\$ 550.00**

Actual in Cash: **\$ 435.00**

+ Transactions: **\$ -115.00**

= Expected in Cash: **\$ 435.00**

Difference **\$ 0.00**

END OF SESSION

CLOSING CONTROL

CLOSED & POSTED

VALIDATE CLOSING & POST ENTRIES

CLOSING CONTROL

CLOSED & POSTED



Point of Sale

Analyze the PoS Sales

8



Roger • Inventory Manager

Hey, can you tell me which products are the best sellers?

You



I'll check on the [Orders Reporting](#).



Analyze the PoS sales

8



Point of Sale

Reporting ▶ Orders

Orders Analysis

MEASURES ▾



- Average Price
- Delay Validation
- Product Quantity**
- Sale Line Count
- Subtotal w/o discount

Filters ▾

Group By ▾

Time Ranges ▾

Favorites ▾

- Salesperson
- Point of Sale
- Product**
- Product Category



Sell Services

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

Install the Apps required for the following business flow.

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



Project

Organize and schedule your projects



INSTALL



Apps



Timesheets

Timesheet Validation and Grid View



INSTALL



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



Apps

Timesheet



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



Sell Services

Set up a Project

1

You



I'll **create a 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 does 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



Choose a
Project Email

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

0

0

0

0

Done

ADD

Examples



If you made a mistake in the name of the stage, click on the icon when you hover your cursor over the column. 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

Hi, 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

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!

Jeffrey

[boogle-old-office.jpg \(101K\)](#)



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” in the project Office Design. 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

⋮



No activities planned.

+ SCHEDULE AN ACTIVITY

i

Click on ⚡ to mark the task as:

● Ready for the Next Stage

● Blocked

Activity

Meeting

▼

Summary

Visit Boogle's Office

SCHEDULE

★

Sell Services

Configure a Product

4



Sophia • Sales Manager

I think it's a mistake to offer our Office Design services 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

Product Name

 Can be SoldOffice Design Service Can be Purchased

General Information

Variants

Sales

Accounting

Product Type Service

Sales Price 50.00



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.

General Information

Variants

Sales

Accounting

Service Invoicing Policy

 Timesheets on tasks

Service Tracking

 Create a task in an existing project

Project

Office Design



Bonus Point • You could have set Service Tracking as Create a task or Create a project. Both are valid options. But you get an extra ★ if you choose Create a task in an existing project. 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	Ordered Qty	Unit Price	Taxes	Subtotal
Office Design Service	20.000	50.00	15%	\$ 1000.00

Untaxed amount: \$ 1000.00

Tax: \$ 150.00

Total: \$ 1150.00

CONFIRM

QUOTATION

QUOTATION SENT

SALES ORDER



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

Project(s)
Overview1
Tasks

Sell Services

Record Timesheet

6

You



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



Audrey • Interior Manager

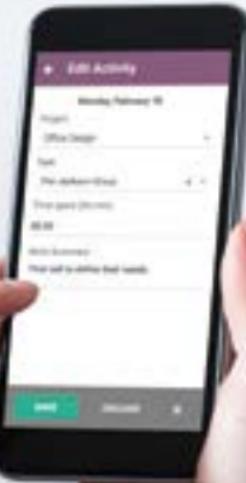
Hold on, I'm on the phone with The Jackson Group.

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

You



Thanks. Use the **Timesheets App**, it's easy.



Record Timesheet

6



Timesheet

Timesheet ➔ Timesheet App

▶ START

00:28:24

STOP

← Edit Activity

Project

Office Design

Task

SO001: The Jackson Group



Time spent (hh:mm)

00:30

Work Summary

First call to define their needs.

SAVE

☰ Today (00:30)



Office Design

The Jackson Group

- 00:30 +

i

By default, the app rounds up the time set by quarter. You can change this in the Settings.

i

There are many ways to record timesheets: directly from the task, via the mobile app: "Awesome Timesheet", or via the grid to control the whole week. All of these methods give the same result.



Timesheet

Timesheet ➔ My Timesheets

	Mon	Tue	Wed	Thu
SO02: The Jackson Group	00:00	00:00	00:30	00:00
Total - Hour(s)	00:00	00:00	00:30	00:00



Sell Services

Invoice Customer

7



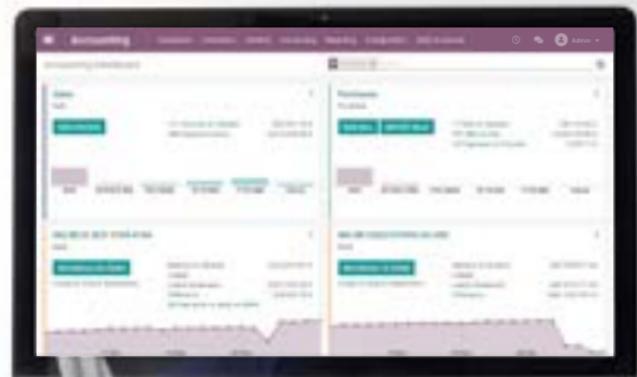
Anita • Accountant

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 generated the **draft invoices**, you can review them.



Invoice Customer

7



Sales

To Invoice ▶ Orders to Invoice

Order Number	Customer	Total	Invoice Status
--------------	----------	-------	----------------

S0002	The Jackson Group	\$ 1150.00	To Invoice
-------	-------------------	------------	------------

[CREATE INVOICE](#)

QUOTATION

QUOTATION SENT

SALES ORDER

Create Invoice

 Regular invoice[CREATE AND VIEW INVOICE](#)

Product	Quantity	Price	Taxes	Subtotal
---------	----------	-------	-------	----------

Office Design Services	0.500	50.00	15.00%	\$ 25.00
------------------------	-------	-------	--------	----------

[VALIDATE](#)

DRAFT

OPEN

PAID



Manufacture

Your business is booming! MyOffice is now a brand known for the quality of their 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 and **activate the settings** to run the following business flow:

Define the Bill of Materials

1

Purchase Raw Materials

2

Receive Products

3

Manufacture 3 Tables

4

Set up Routings & 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 based on the routing.

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, 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	10 \$
Table Leg	4	12 \$
Bolt	4	0.50 \$



Define the Bill of Materials

1



Manufacturing

Master Data ▶ Products

CREATE

Table

General Information

Sales

Purchase

Inventory

Product Type

Storable Product

Sales Price

330.00

Cost

\$ 115.00

Update Cost



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: Master Data ▶ Bills
of Materials

Product Table

BoM Type



Manufacture this product

Quantity 1.00

Components

Quantity

Table Top

1.000

Table Leg

4.000

Bolt

4.000

Add a line



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.



Receive Raw Materials

2



Purchase

CREATE

Vendor Only Woods Inc.

Products

Other Information

Product	Quantity	Unit Price	Taxes	Subtotal
Table Top	100	40.00	15.00%	\$ 4,000.00
Table Leg	400	12.00	15.00%	\$ 4,800.00
Bolt	400	0.50	15.00%	\$ 200.00

Untaxed amount: \$ 9000.00

Tax: \$ 1350.00

Total: \$ 10350.00



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

RFQ

RFQ SENT

PURCHASE ORDER



Manufacture

Receive Products

3



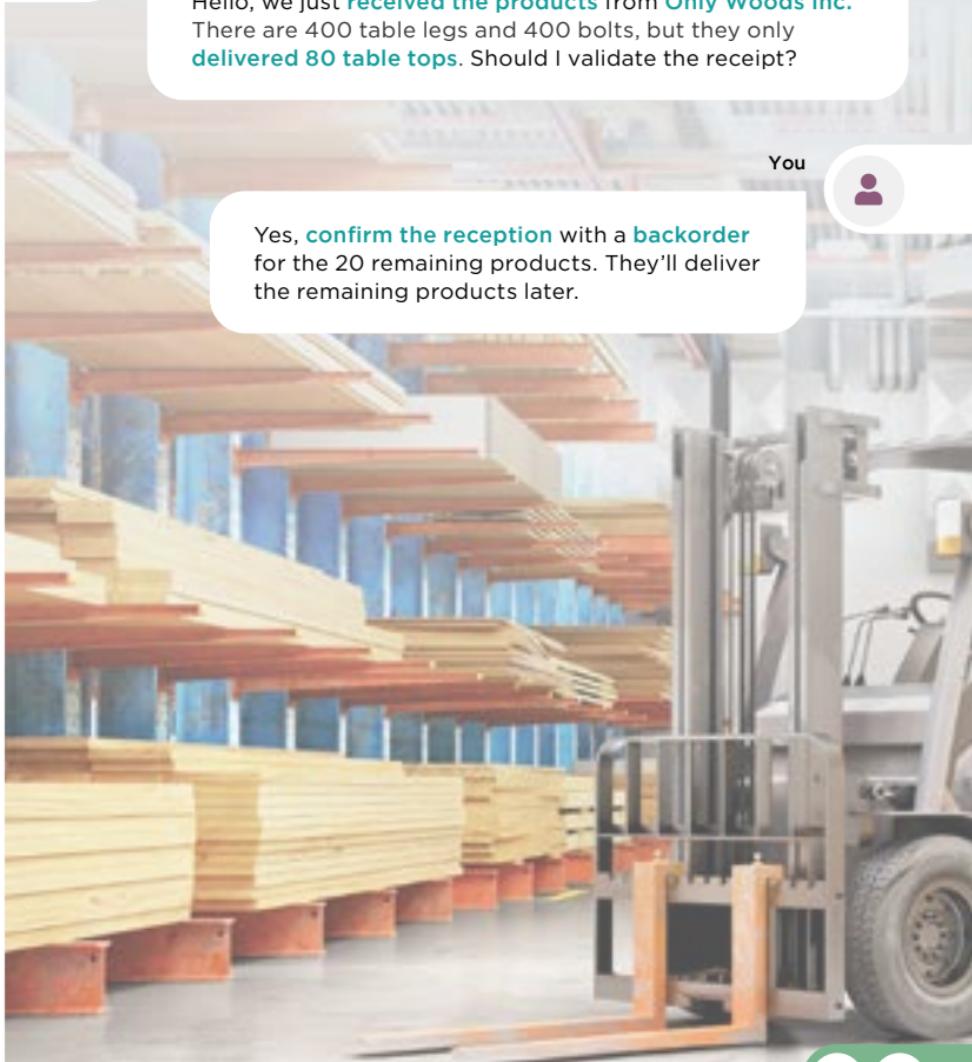
Randall • Inventory Officer

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

My Company

⋮

1 TO PROCESS



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



1

Receipt

Reference

Partner

Source Document

Status

WH/IN/00001



Only Wood Inc.

P000001

Ready

WH/IN/0001

Partner

Only Wood Inc.



Source Document

P00001

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

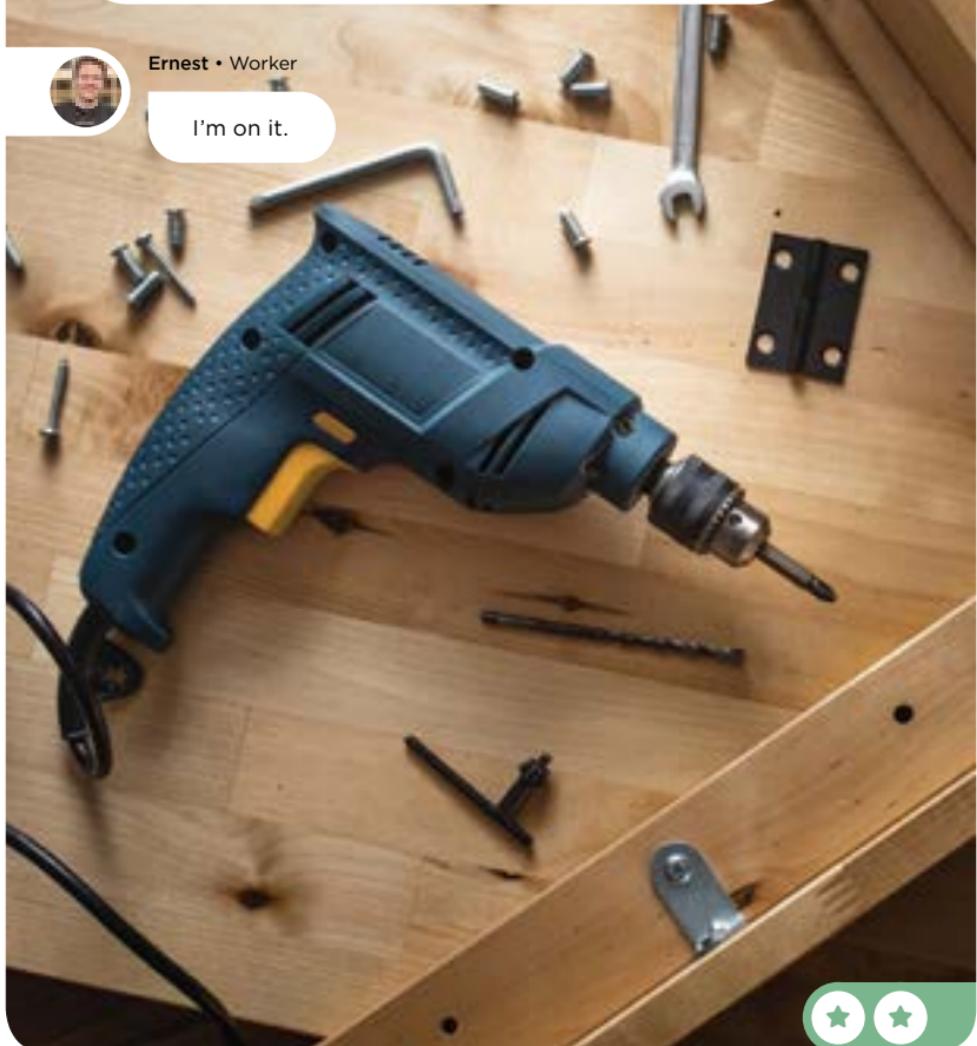


Ernest, we got all the materials we need to start producing desks. Can you **manufacture 3 tables** for the showroom?



Ernest • Worker

I'm on it.



Manufacture 3 Tables

4



Manufacturing

Operations ▶ Manufacturing Orders

CREATE

Product

Table

Quantity to Produce

3.000

Bill of Material

Table

SAVE

CHECK AVAILABILITY

PRODUCE

Quantity 3.000

RECORD PRODUCTION

CONFIRMED

IN PROGRESS

DONE

Product

Table

Quantity to Produce

3.000

Consumed Materials

Finished Products

Product

To Consume

Reserved

Consumed

Table Top

3.000

3.000

3.000

Table Leg

12.000

12.000

12.000

Bolt

12.000

12.000

12.000

MARK AS DONE

CONFIRMED

IN PROGRESS

DONE



Manufacture

Routings & Work Center

5



Sharlene • Manufacturing Engineer

I plan to organize the manufacturing line by creating **2 work centers: 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 routing "Table Production"** with **2 operations: Assembly** and **Painting** from the 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 on the assembly operation?**



Routings & Work Center

5



Manufacturing

Master Data ▶ Bills of Materials

Product	Quantity	
Table	1.00	<button>EDIT</button>

Routing ▼

Create and Edit

Routing Table Production

Work Center Operations Notes

Operation Work Center

Add a line ▶

Operation Assembly

Work Center Assembly Station ▼

Description Work Sheet



◀ ▶ ✖ SAVE & NEW

Repeat for the Operation Painting with the work center Painting Room



Manufacture

Plan an Order

6

You



Sharlene, our routing is set up. We can **create a manufacturing order** for the table and **plan** the work orders.

When planned, operations become available on the tablet of 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 to Produce

1.000

Bill of Materials

Table

PLAN

CONFIRMED

PLANNED

IN PROGRESS

DONE



Manufacturing

Operations ▶ Work Orders

WH/MO/00002 - Assembly

Table 1.000 Unit(s)



Table: 1.000

/1.000 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 Quality control point** on the **assembly operation** to measure the **torque**.

We will ensure that the measure stays **between 11.00 and 15.00 Nm**.



Add a Quality Check

7



Quality

Quality Control ➤ Control Points

CREATE

New

Title

Torque Setting

Control Type

All Operations



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

Product

Table



Type

Measure



Operation

MyOff.: Manufacturing



Norm

13.00

Nm

Work Order
Operation

Assembly



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 the quality control.

SAVE



If you install the IoT App, you can send the measure 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 through
the **work center control panel**.

You



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



Check your Quality Test

8



Manufacturing

Operations ▶ Manufacturing Orders

CREATE

Product

Table

Quantity to Produce

1.00

Bill of Material

Table

Routing

Table Production

PLAN

CONFIRMED

PLANNED

IN PROGRESS

DONE



Manufacturing

Operations ▶ Work Orders

WH/MO/00003 - Assembly

Table 1.000 Unit(s)



Measure: 14.00

Nm

VALIDATE



Table: 1.000

/1.000 Unit(s)

WH/MO/00002-Assembly



Pause

◀ Previous

Skip ➔

✓ MARK AS DONE

Date	Operator	Title	Result	Status
01/18/2020 14:57:01	Admin	Torque Setting	14 Nm	Done



Manufacture

Control Cost

9



Anita • Accountant

Hi, 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 **cost structure** on the Bill of Materials for theoretical costs if you want to update it.



Control Cost

9



Manufacturing

Master Data ▶ Bills of Materials

 Product

Quantity

Routing

 Table

1.00

Table Creation

Structure & 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



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 operations.



INSTALL



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



All the barcodes needed for the next exercises, are here.



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 use a smartphone with the Odoo app instead of a barcode scanner, you'll need to authorize the Odoo app to use your camera when you hit the "Tap to Scan" button.

1

Plug the barcode scanner into your computer.



2

As a barcode scanner simulates 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 of your barcode scanner, you might need to scan special barcodes to configure it according to your keyboard.



Use Barcodes

Set up your Products

2

You



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

Can you **set the barcode references** on our products?

Sharlene • Manufacturing Engineer

Ok, I set the barcode reference
DESK12345678 to the **Large Desk**.



Set up your Products

2



Inventory

Master Data ▶ Products



Large Desk

Price: \$ 220.00

On hand: 4.000 Unit(s)



Product Name

Large Desk

General Information

Variants

Sales

Purchase

Inventory

Product Type

Storable Product

Sales Price

\$220.00

Barcode

DESK12345678

Cost

\$100.00

Update



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.



Receive Products

3



Barcode

- 1 Initiate a receipt.



WH-RECEIPTS

- 2 Scan the product, 3 times.



DESK12345678

- 3 Validate the transaction.



O-BTN.validate



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 sent it to you right now! Your email address is still brandon@game.odoo.com ?



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

Subtotal

Large Desk

3.000

\$ 220.00

15.00%

\$ 660.00

[Add a product](#)[Add a section](#)[Add a note](#)**Subtotal:** \$ 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** in priority?

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

Delivery Packages

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

SAVE



Barcode

OPERATIONS

Delivery Orders

1 TO PROCESS



WH/OUT/00001



Ready

Azure Interior, Brandon



01/15/2020



DESK12345678



DESK12345678



O-BTN.pack



DESK12345678



O-BTN.pack



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 the 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 ADJUSTMENT

Scan 3 times



DESK12345678



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, WH/stock, in 3 zones. I'll **create these 3 new locations: ZoneA, ZoneB, ZoneC** with their respective barcodes: **ZONEA, ZONEB, ZONEC**.



Define Locations

7



Inventory

Configuration ➔ Settings

Warehouse



Storage Locations

Track product 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 printed 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 the 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 the products you picked.



DESK12345678

- 3 Next, scan the destination shelf: ZONEA.



ZONEA

- 4 Finally, validate it.



O-BTN.validate



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 will 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 select the Graphene theme.

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



Once you choose a theme, it's difficult to switch to another one. Take the time to check the themes that interest you and select the right one to start with.



If published, your page is online.

Published



+ New

Edit



Sell Online

Design your Homepage

1

You



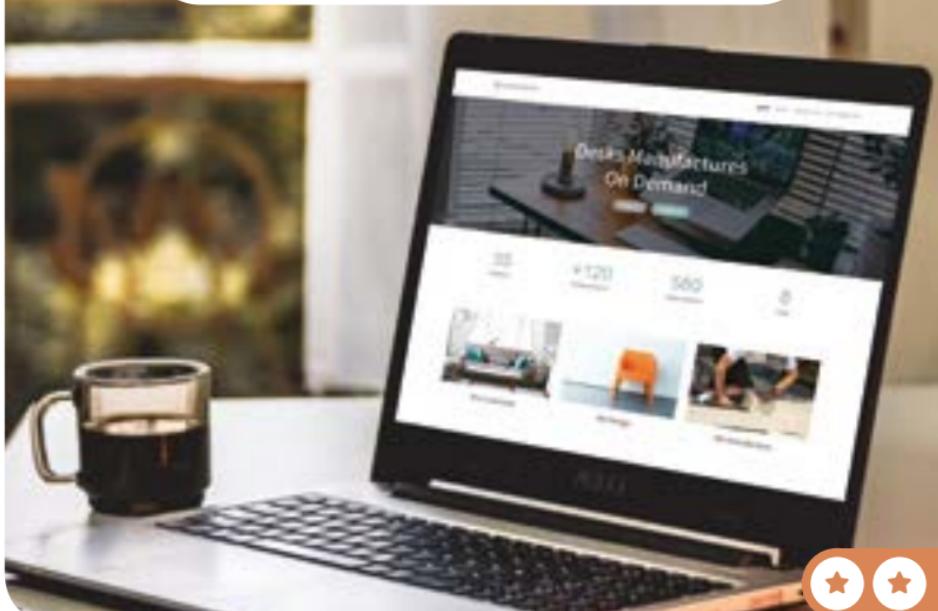
I'm launching our new website. Any idea what we should put on our homepage?

 Sophia • Sales Manager

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

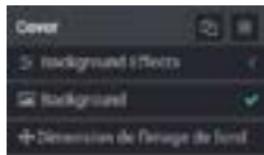
I would put some key numbers like: **580 customers, 35 employees, 120 designed products, 8 shops.**

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



Design your Homepage

1



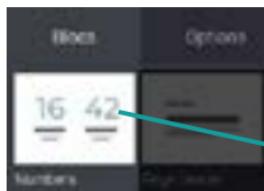
Select a media

Upload an image



When searching for an image,
use Unsplash to find great photos,
free of charge

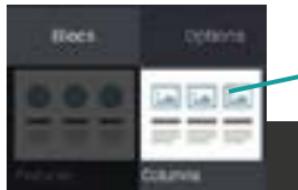
Unsplash ▾



35
Episodes

+120
Designed products

5



We Design



Save



Sell Online

Create a Product

2



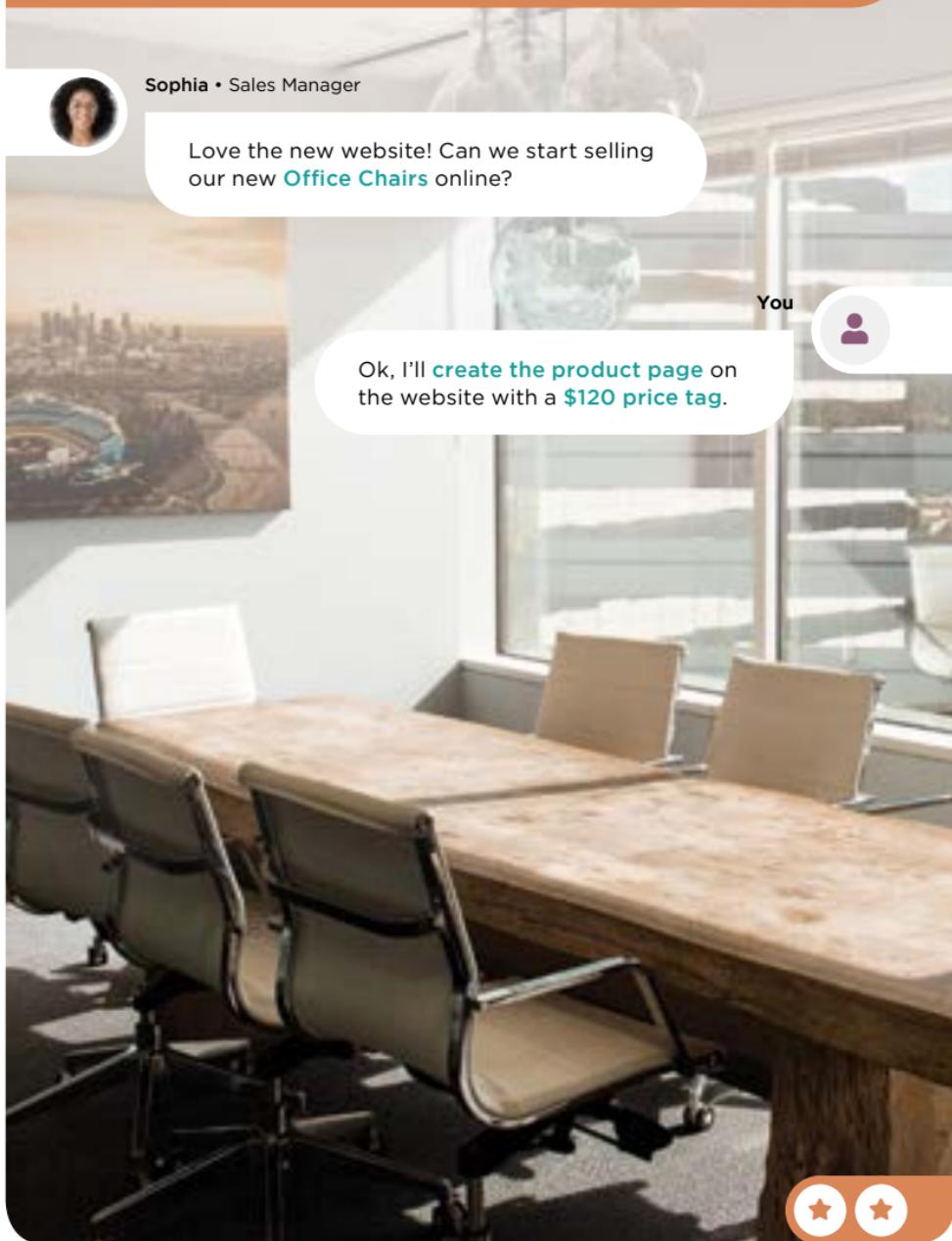
Sophia • Sales Manager

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



New Page



New Product



New Blog Post

New Product

X

Name:

Office Chair

CONTINUE

1 Upload an image



2 Set the price

\$ 120.00

Save

Product: Office Chair

Search



Office Chair

\$ 120.00

- 1 +

Add to Cart

30-day money-back guarantee
Free Shipping in U.S.
Buy now, get in 2 days.



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.



Improve SEO

3



Website

Website

Promote ➔ Optimize SEO

Title ②

Office Chair On Sale | MyOffice Inc.

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.

Keywords:

Office Chair

English ▾

Add

Keyword H1 H2 T D C Related keywords

Office Chair



office chairs on sale

office chairs near me



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.

The screenshot shows a web browser displaying a product page. The title bar says "Office Chair On Sale | MyOffice Inc.". The URL in the address bar is "myoffice.odoo.com/shop/office-chair-on-sale". The page has a purple header with the word "Website". Below the header, there's a breadcrumb navigation "Products / Office Chair". A search bar with a magnifying glass icon is on the right. The main content features a large image of an office chair, the title "Office Chair" in bold, and the price "\$ 120.00".



A good practice is to target the same keywords in the title of your page, the URL, and the product name. If you change the product name, the URL is updated accordingly.



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 even put
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

EDIT

Office Chair

General Information

Variants

Sales

eCommerce

Attribute

Attribute Values

Size

Small

Medium

Large

Color

Grey

White

Black

Purple

Attribute Name

Color



Type

Color

Embroidery



Custom

No embroidery

Attribute Name

Embroidery

Type

Select

Create Variants

Never

Attribute Values

Value

Is custom Value

No embroidery



Custom



Sell Online

Test your eCommerce

5

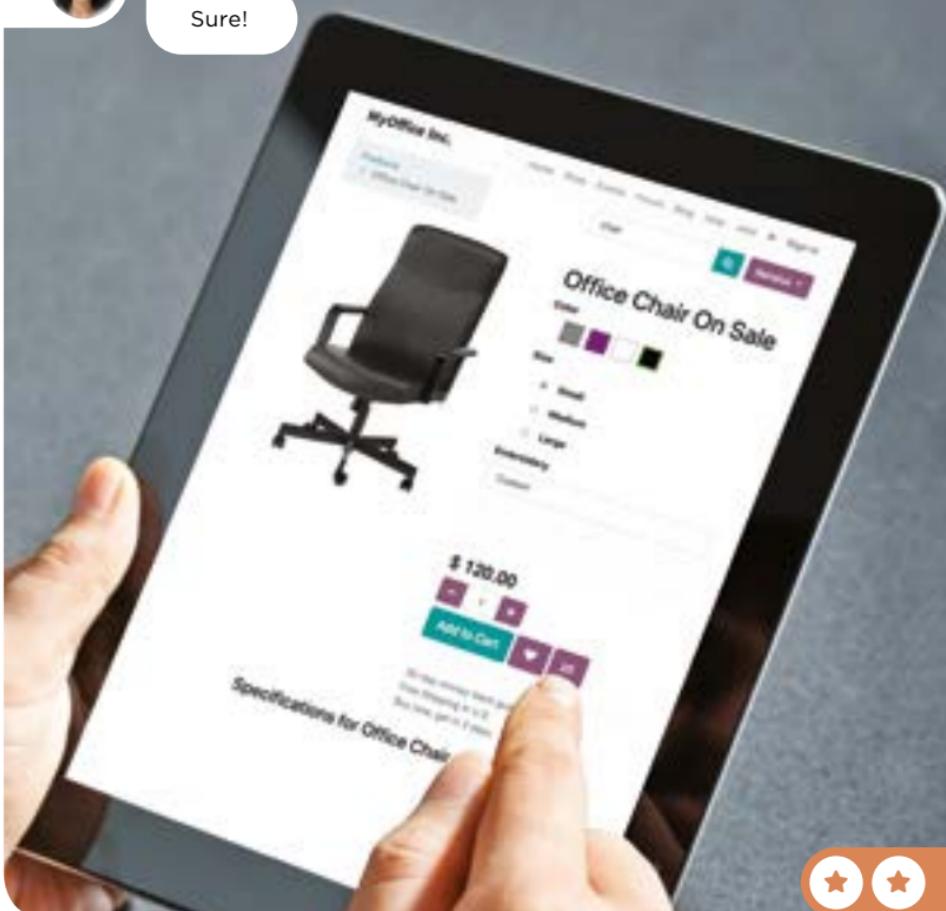
You



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

Sophia • Sales Manager

Sure!





Office Chair On Sale

Color



Size

- Small
- Medium
- Large

Embroidery

No embroidery

\$ 120.00

Add to Cart



Review Order

Address

Confirm Order

Product

Quantity

Price

Office Chair On Sale
Embroidery: No embroidery

1

+

\$ 120.00

Subtotal: \$ 120.00

Taxes: \$ 18.00

Total: \$ 138.00

< Continue Shopping

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 did \$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 we will set as an **option of the chair**. This warranty has **2 variants: 3 or 5 years.**



Upsell Customers

6



Website

Products ▶ Products

CREATE

Warranty

General Information

Variants

Sales

eCommerce

Product Type

Service

Sales Price

50.00

General Information

Variants

Sales

eCommerce

Attribute

Attribute Values

Duration

3 Years X

5 Years X



Website

Products ▶ Products



Office Chair

12 Variants

Price: \$ 120.00



General Information

Variants

Sales

eCommerce

Optional Products

Warranty

i

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 3-year or 5-year warranty. You can use this mechanism to do a multi-level product configuration, as the warranty (optional product) can have options, too.



Sell Online

Write a Blog Post

7



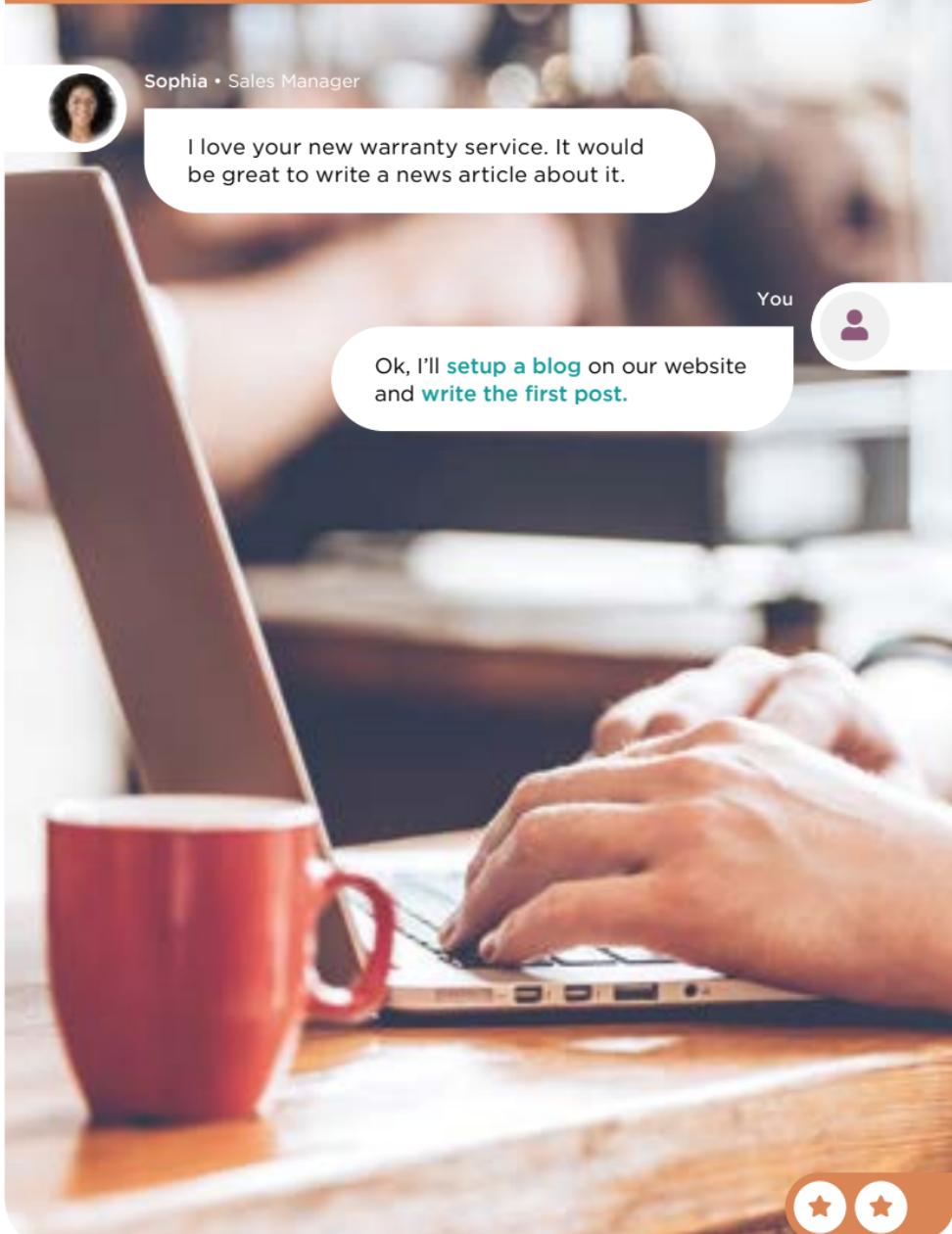
Sophia • Sales Manager

I love your 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



New Page



New Product



New Blog Post

New Blog Post

x

Do you want to install Blogs App?

INSTALL



New Blog Post



To set a cover to your blog, click on the title then use the “Change Cover” option in the Top-Left “Customize” menu.

MyOffice Inc.

HOME SHOP CONTACT

Options x

BLOCK

Change Cover

Year Warranty on Furniture

Our Quality Contract



Create your App

Following the great feedback you received from your office design services, you are ambitious and want to go further. You plan to rent fully furnished offices! You already have a few offices on the market and you need a dedicated app, to manage those 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!



Initialize your App

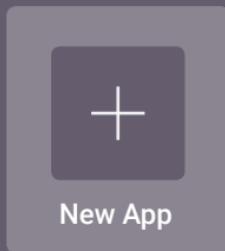
1



Admin ▾



Settings



New App

Create your App

Choose an app name

Office Rental

NEXT >



Design your Icon



Create your first Menu

Choose your first object name

Offices

CREATE YOUR APP >



Create your App

Design Office Form

2

You



What information do you need on an office form?

Sophia • Sales Manager

Basic information such as the **name, photo, rental price** but also the **capacity** (number of available desks), **address**, **type of office (open space or closed space)**.



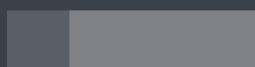
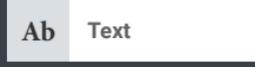
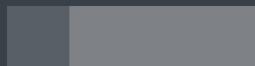
Design Office Form

2

VIEWS > FORM

+ Add

New Fields



Name



Image

Rent \$ 0.00

Capacity 0

Address

Photo



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* on the left menu.



Add Chatter Widget

CLOSE



Create your App

Manage Rental Status

3



Sophia • Sales Manager

I love our database of offices!

But can we manage office status:

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

You



Ok, I'll **add a pipeline status bar** to the form.



Manage Rental Status

3



Admin ▾

Add a pipeline status bar

Field Properties

☰	Available	<input checked="" type="checkbox"/>	
☰	Leased	<input checked="" 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

Creekside Drive, 645
Open Space • 15 desks

Available \$ 3500

Merriman

Merriman Street, 4597
Open Space • 45 desks

Leased \$ 65000

Chestnut

Chestnut Street, 1450
Closed Space • 150 desks



Record your Offices

4



Office Rental

Office Rental ▶ Offices

CREATE

AVAILABLE

LEASED

TO RENEW

Merriman

Address Merriman Street, 4597**Photo****Rent** 3,500.00**Type** Open Space**Capacity** 45

SAVE



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	2000	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

Office Rental ▶ Offices



Type	Nº	Capacity	€	Rent	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	



You can find these fields in the "Existing fields" section.

CLOSE



When you are customizing a screen in 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 leased or not?

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

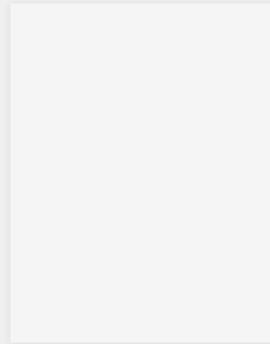
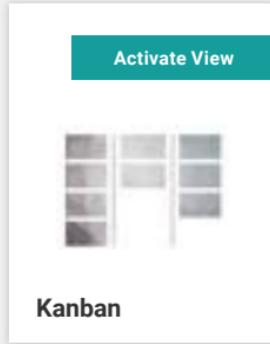
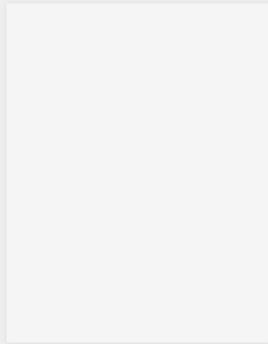
Office Rental ▶ Offices



Views



Multiple Records Views



View

Default Group by

Status

Name

Add a Priority

Add an image



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?

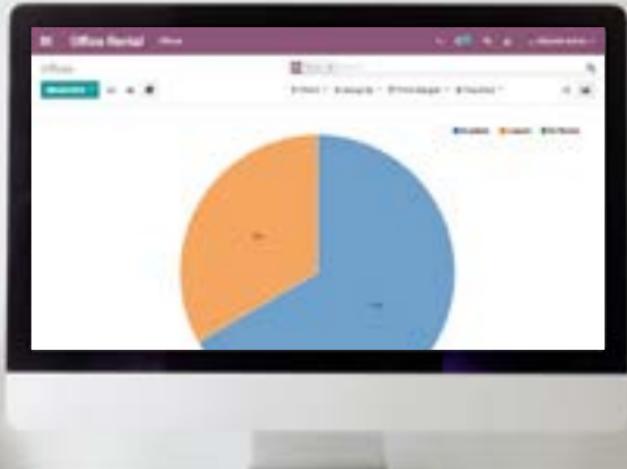
 Sophia • Sales Manager

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

You



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



Create Statistic reports

7



Office Rental

Office Rental ➔ Offices



Views

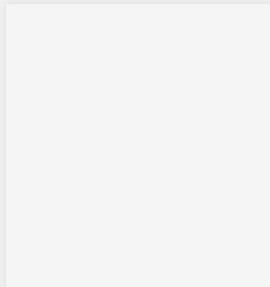


Reporting & Presenting Views

ACTIVATE VIEW



Graph



CLOSE

Offices

MEASURES ▾



✓ Capacity

New Monetary

Rent

☰ Group By ▾

Add Custom Group ▾

Status

APPLY



Bonus Point • You get an extra ★ if you found the following pie chart, 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 small 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.



Merriman

Merriman Street 4597

Rent
\$ 3500.00

Type
Open Space

Capacity
45



Design a Report Template

8



Office Rental

Office Rental > Offices



Views

Reports



CREATE

Blank
No header/footer

Block

Field

Field

Field

Field & Label

Title Block

Text

doc (Offices) > Photo

doc (Offices) > Name

Heading1

doc (Offices) > Address

Rent

Type

Capacity

About MyOffice Inc.

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.

PRINT

