SCALE UP!

The Business Game

odoo

odoo

This version is adapted for Odoo 17.

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SCALE UP!

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 set up your B2B business: from buying new products to selling and delivering them 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
- **Recruit** a new employee
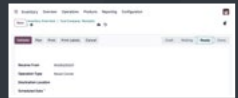
Good luck with your new business!

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. **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 in 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 set up an integrated management software.

Create your company's database on www.odoo.com through the **"Start Now. It's free." 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

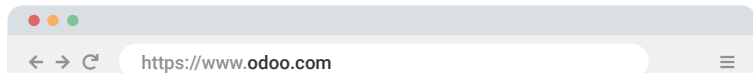**Invoice** customer   7

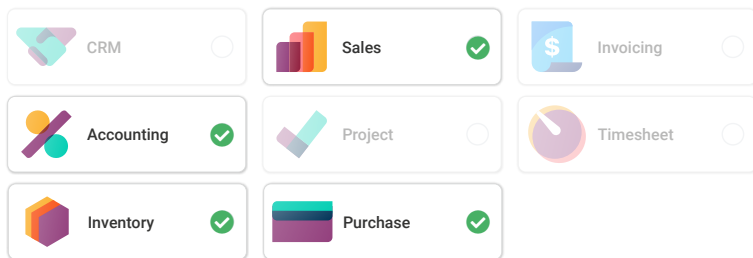**Record** payment   8

Analyze profits   9

Install the apps

https://www.**odoo.com**

Start Now. It's Free

	CRM	○
	Sales	✓
	Invoicing	○
	Accounting	✓
	Project	○
	Timesheet	○
	Inventory	✓
	Purchase	✓

ⓘ 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** ✏

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

Country
United States ▼

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

Start now >

Once finished, you will receive an email to activate your database and choose a password.

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.
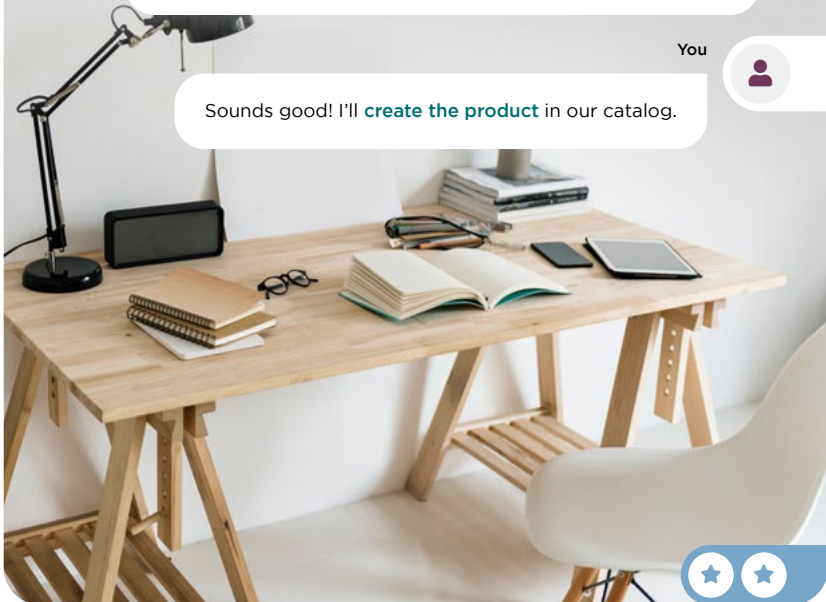
You

How much do they 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

Purchase | Products ▶ Products | **New**

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	⚙
⠿ Wood Corner	10.00	100.00	🗑
⠿ Wood Corner	1.00	140.00	🗑

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

Purchase large desks

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

Purchase   **Orders** ▸ Requests for Quotation   **New**

Vendor   Wood Corner ▾

| Products | Other Information |

Product	**Quantity**	**Unit Price**	**Taxes**	**Subtotal**	
Large Desk	10.00	100.00	15%	$ 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.   🚚 Receipt 1

Receive products

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

Inventory

Receipts

⋮

1 To Process

Reference	Contact	Status
WH/IN/00001	Wood Corner	Ready

WH/IN/00001

Receive From Wood Corner ▾   **Source Document** P00001

Operations	Additional Info	Note

Product	Demand	Done	
Large Desk	10.00	10.00	🗑

ⓘ
If you don't enter the quantity received in the "Done" column, Odoo asks you to confirm that you want to validate all ordered quantities.

Validate ▶   Draft 〉 Waiting 〉 Ready 〉 **Done**

ⓘ
Did you click on **Receive Product** or on **the truck** instead of going to the Inventory application? If so, you understood the magic of the integration.

Receive products

🚚 Receipt 1

⭐

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
		Subtotal	$ 1,100.00
		Tax	$ 165.00
		Total	$ 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

New

Vendor	Wood Corner ▾	**Bill Date**	▾
Auto-Complete	Select a p. o. ▾		
	P00001: $ 1,000.00		

Invoice Lines	Optional Products	Other Info

Product	Quantity	Price	Taxes	Subtotal	
Large Desk	10.00	100.00	15%	$ 1,000.00	🗑

Add a line

Confirm ▶ Draft ⟩ **Posted**

⭐ **Bonus Point** • There is a difference between the bill auto-completed by Odoo ($1,000.00) and the vendor bill ($1,100.00). 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).

You can generate a credit note directly from the related invoice. To do so, go to Accounting ▶ Vendors ▶ Bills, open the related bill, and click on **Credit Note**.

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

Hello, on your bill 2022/0123, you charged us $110 per unit instead of the $100 we agreed upon. Please send a credit note with the right amount.

☺ 🔗   ⤢

Send

⭐

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

Sales   **Orders** ▸ Quotations   **New**

Customer   Azure Interior, Brandon ▼

Order Lines	Optional Products	Other Info

Product	Quantity	Unit Price	Taxes	Subtotal	⋮
Large Desk	3.00 📊	220.00	15%	$ 660.00	🗑

Add a product   Add a section   Add a note

ℹ 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 on **Confirm** .

Quotation ⟩ Quotation Sent ⟩ **Sales Order**

ℹ This button takes you directly to the Delivery Order.

🚚 Delivery 1

⭐

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

Inventory

Delivery Orders ⋮

1 To Process

Reference	Contact	Status
WH/OUT/00001	Azure Interior, Brandon	Ready

Validate

Immediate Transfer?

Do you want to validate all reserved quantities?
For partial quantities fill in the done column

Mark all done

Draft › Waiting › Ready › **Done**

ⓘ **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

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

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 (e.g., 20% or $500).

Create Draft Invoice

Product	Quantity	Price	Taxes	Subtotal
Large Desk	3.00	220.00	15%	$ 660.00

Untaxed amount:	$ 660.00
Tax 15%:	$ 99.00
Total:	$ 759.00

Confirm ▸ Draft 〉 **Posted**

Record payment

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.
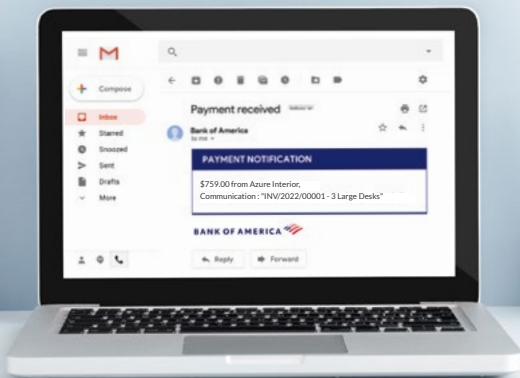
Accounting · **Customers** ▶ Invoices

Customer	Total	Payment status	Status
Azure Interior, Brandon	**$ 759.00**	**Not paid**	**Posted**

Register Payment

ⓘ Did you click on **Register Payment** from **the invoice** instead of going to the Accounting application? Congratulations, once again, you understood how magic the integration between all the applications is.

Journal   Bank ▾

Amount $759.00

ⓘ The **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.

⭐

You

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

Anita • Accountant

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

Accounting   **Reporting** ▶ Profit and Loss

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

/profit 🔍

	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			- $ 300.00
Expenses	**1000.00 €**		
Expenses	1000.00 €		
Depreciation			
Net Profit	- 340.00 €	$ 660.00	$ 360.00

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. 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.

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

Install the apps

Apps

Point of Sale
User-friendly PoS interface for shops and restaurants

Activate

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

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 into the system!

Import your products

Point of Sale Products ▶ Products ▶ ⚙

⬇ Import records
...

Upload file

⬇ Select the file **POS_products.xls** you downloaded on **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*	Ab Name ✕⌄

Import

ℹ You can set categories on the product form to structure how products are organized in the Point of Sale.

General Information	Sales	Purchase

Product Category Desks ▾

ℹ Categories can help you find products faster thanks to the top navigation bar on the Point of Sale interface.

🏠 Desks Miscellaneous

⭐

Configure cash control

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.

x10   x2   x1   x1   x2   x4

Point of Sale   Dashboard ▸   New Session

Opening Cash Control

Opening cash

550   ✕   [🔘]

Opening note

Add an opening note ....

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. These notes will reappear upon closing the Point of Sale session.

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.

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	

LED Lamp
$ 200.00
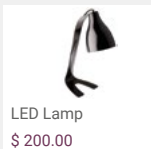
Total: $ 598.00
Taxes: $ 78.00

👤 **Customer**	1	2	3	**Qty**
	4	5	6	**Disc**
>	7	8	9	**Price**
Payment	+/-	0	.	⌫

Cash	600.00 ✖	**>** **Validate**

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

ℹ You can also add products in the Point of Sale by scanning their barcode.

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?

You

Ok, I'll come right away with the money!
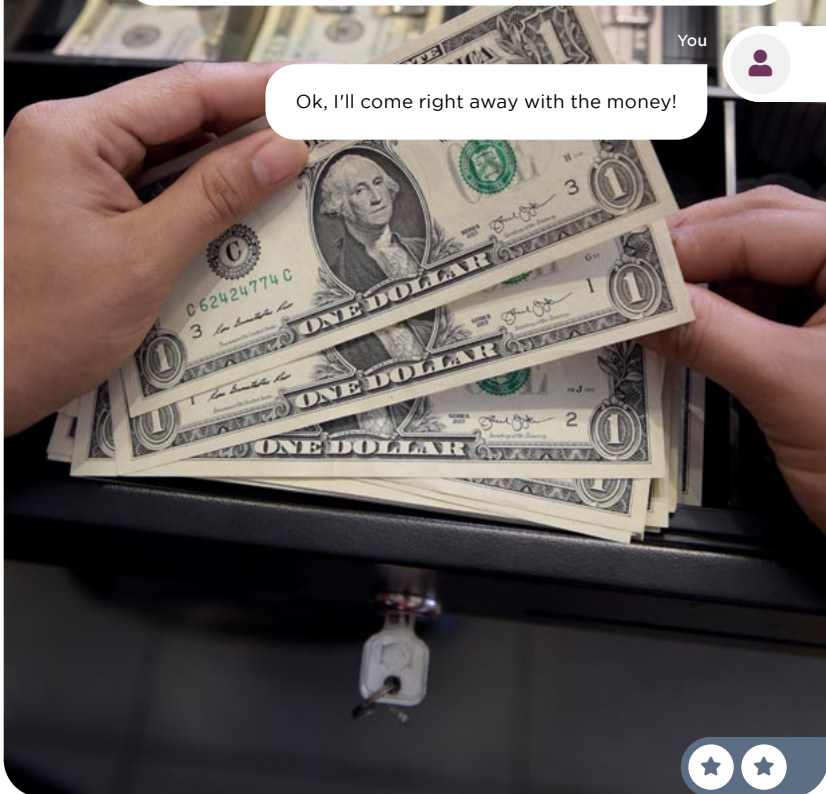
Orders
Cash In/Out
Backend
Close Session

| Cash In | Cash Out | $ -12 |

Sandwiches Anita

Confirm $ -12.00

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 track of all sales and syncs them once it gets back online.

| 2 🛜 | ➡ Close | 2 ⋰ | ➡ Close | 🛜 | ➡ Close |

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, 3000 Hannah Street, New York NY 100001**. My phone number is **(444)-666-9111**.
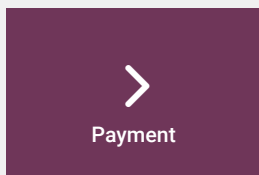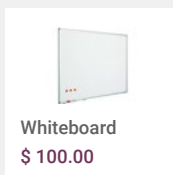
I'll **pay cash**. Here is $200.
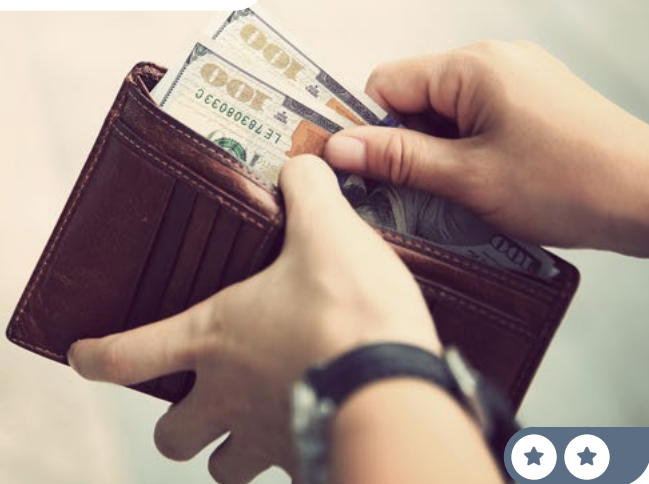
Sell with an invoice

5

👤 Customer	1	2	3	Qty
	4	5	6	Disc
> Payment	7	8	9	Price
	+/-	0	.	⌫

Create ▸ Fill in the form with the customer information ▸ **Save**

Whiteboard
$ 100.00

> Payment

💵 Cash	Change **$ 85.00**	👤 Jennie Fletcher
Cash 200.00 ✖		📄 Invoice **1**
> Validate **2**		

ℹ Click on **Invoice** to invoice the customer.

ℹ You can print the receipt by clicking on 🖨 **Print the receipt**

⭐

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
1,00 Units x $ 230.00 / Units
To Refund: 1.00

$ 230.00   ▸   1   ▸   **> Refund**

> Payment   ▸   Cash   -230.00 ⊗   ▸   **> Validate**

ⓘ You can also make a refund on a gift card. For this, in the backend, go to **Configuration ▸ Settings** to activate the **Coupons**. Then, after selecting the product to refund, select the product **Gift Card**. Upon validating the payment, the amount is automatically added on a barcode to download or print.

LED Lamp **-1.00** Unit(s) at $ 200 / Units	**$ -230.00**
Gift Card **1.00** Unit(s) at $ 200 / Units	**$ 230.00**
	Total: $ 0.00

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!!

Orders

Cash In/Out

Backend

Close Session

Closing Session   **Total 3 orders: $ 483.00**

Payment Method	**Expected**	**Counted**
Cash	$ 1,021.00	1021
Opening	$ 550.00	
- Sandwiches	$ 12.00	
+ Payments in Cash	$ 483.00	

Closing note

Add a closing note ....

Close Session

ⓘ You started this session with **$550**. Then you sold 3 lamps and the whiteboard (**$598 + $115**), helped Anita out (**$-12**), and refunded one lamp (**$-230**). You should have a total of **$1,021.**
Figures might change depending on the taxes in your country.

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

Point of Sale **Reporting** ▸ Sales Details

Sales Details

Start Date	*Yesterday's date* ▾
End Date	*Today's date* ▾

Print

Daily Sales Report Z

Session ID: POS/00001
07/28/2023 12:17:41 - 07/28/2023 12:24:46

Sales

Product Category	Product	Quantity	Total (VAT excluded)
		4.0	620.00€
	[FURN_0003] LED Lamp	2.0	320.00€ Disc: 20.0%
	[FURN_0003] LED Lamp	1.0	200.00€
	[FURN_0009] Whiteboard	1.0	100.00€
Total		4.0	620.00€

Taxes on sales

Name	Tax Amount	Base Amount
21%	130.20€	620.00€
Total	130.20€	620.00€

Refunds

Product Category	Product	Quantity	Total (VAT excluded)
		-1.0	-200.00€
	[FURN_0003] LED Lamp	-1.0	-200.00€
Total		-1.0	-200.00€

Taxes on refunds

Name	Tax Amount	Base Amount
21%	-42.00€	-200.00€
Total	-42.00€	-200.00€

Payments

Name	Total
Cash	508.20€

Discounts:
Number of discounts: 1

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 set up 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
Improve SEO	2
Create a product page	3
Set up a product configurator	4
Test your ecommerce	5
Cross-sell to customers	6
Write a blog post	7

Install the app

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
relevant contant

Build my website

ⓘ Select your favorite theme.

You

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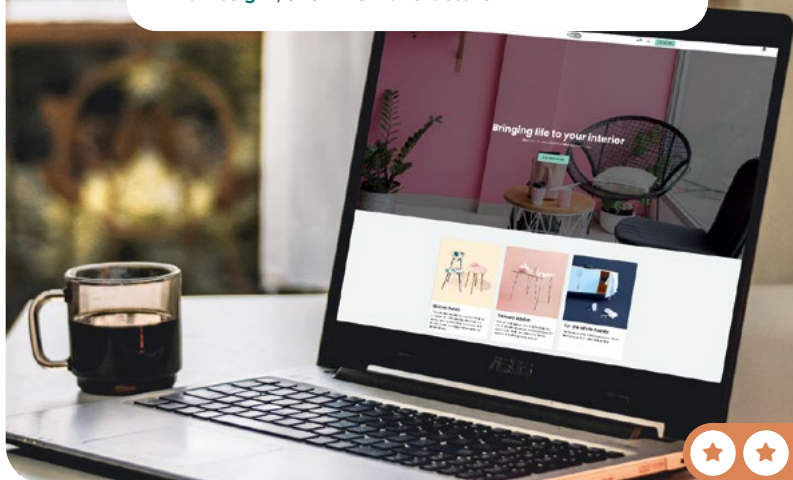
Sophia • Sales Manager

I like websites with a **cover at the top**, customized with an office **image** as the background.
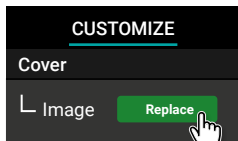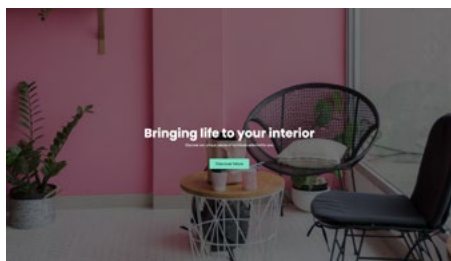
I would put some key numbers like **700+ happy customers, 35 employees, 120+ designed products**, and **4-year guarantee**. I would love to see an **animated shape** in the background of this block.

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

Design your homepage

CUSTOMIZE

Cover

└ Image **Replace**

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

Search an image 🔍

BLOCKS 45 91

Numbers

Background

BLOCKS

Columns

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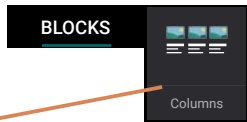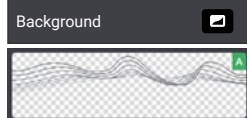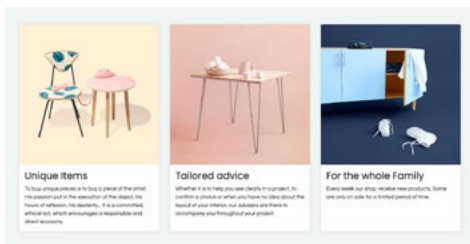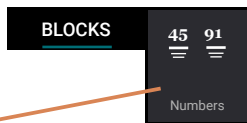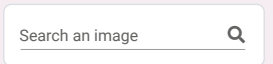
ℹ If the slider is on "Published", your page is online.
You can test it on your smartphone when it's online!

✓ Published 📱 + New ✏ Edit

Sophia • Sales Manager

I cannot find our website on Google when I search for "desks". Can we optimize the Search Engine Optimization (SEO)?

You

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

The promote tool will help us to understand what needs to be changed on our product page in order to improve the SEO.

Once I make the changes suggested by the tool, our product will have more chances to appear in the first pages of results from the Google search.

Website   Site ▶ Optimize SEO

Title ❓

Desk Manufactured on Demand

Description ❓

Keywords

Desks | English (US) ⌄ | **Add**

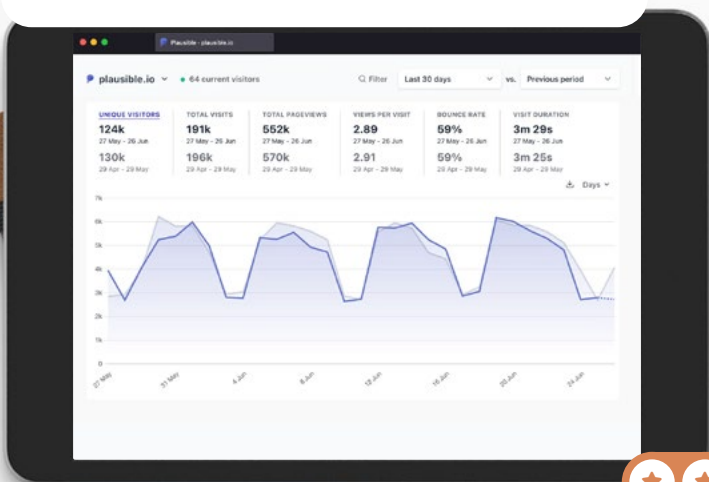| **Keyword**	**H1**	**H2**	**T**	**D**	**C**	**Related keywords**
Desks	✔				✔	for sale near me for home office with drawers for small spaces deskspacing

Preview

Desk Manufactured on Demand

https://myoffice-inc.odoo.com/
The description will be generated by search engines based on page content unless you specify one.

ⓘ Most "**desks**" searches on Google are related to "for home office" searches. By adding these keywords, you should attract more visitors.

Desks Manufactured on Demand

Whether it's your home office or your open space

Contact us
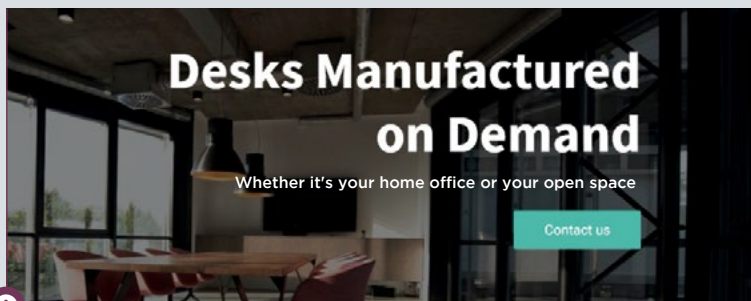
ⓘ You can change the home page description based on the **Related keywords**.

⭐

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**.

Sophia • Sales Manager

Perfect, and don't forget to **add a description** on the chair. For this, get inspired from the results from the **Optimize SEO** pop-up.

Create a product page

✅ **Published** 📱 **+ New** ✏️ **Edit**

New Product ✕

Product Name: Office Chair

Sales Price $ 120.00

Customer taxes 15%

Save

📄 Page   🛒 Product 👆

🔍 Search...

All Products / Office Chair

Product description

Office Chair

Office chair with extra cushions to make it comfortable when sitting for long periods. When adding a footrest, your position is more ergonomic and will avoid any pain.

$ 120.00

− 1 + 🛒 **ADD TO CART**

Main image   **Replace** 👆
Extra image   Add   Remove all

⭐ **Bonus Point** • Check if your product is published in the top-right corner; otherwise, visitors can't access the page.
You get an extra ⭐ if you thought about publishing it.

✅ Published

⭐ ⭐

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 for the chair product**.

What are the options?

Sophia • Sales Manager

They come in **4 colors**: **Grey (R130, G130, B150)**, **Black (R0, G0, B0)**, **White (R255, G255, B255)**, and **Purple (R113, G75, B103)**, and in 3 sizes: **Small**, **Medium**, and **Large**.

Set up a product configurator

4

Product Catalog

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

Save

Sales   Products ▸ Products ▸   Office Chair

☆ Office Chair

| General Information | Attributes & Variants | Sales |

Attribute	Values
Size	Small Medium Large
Color	

Create "Color"
Create and edit

Attribute Name	Color
Display Type	⦿ Color

Attribute Value

Value	Is custom va...	
Grey	☐	🗑

130   130   150
R   G   B

Test your ecommerce

You

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

Sophia • Sales Manager

Sure!
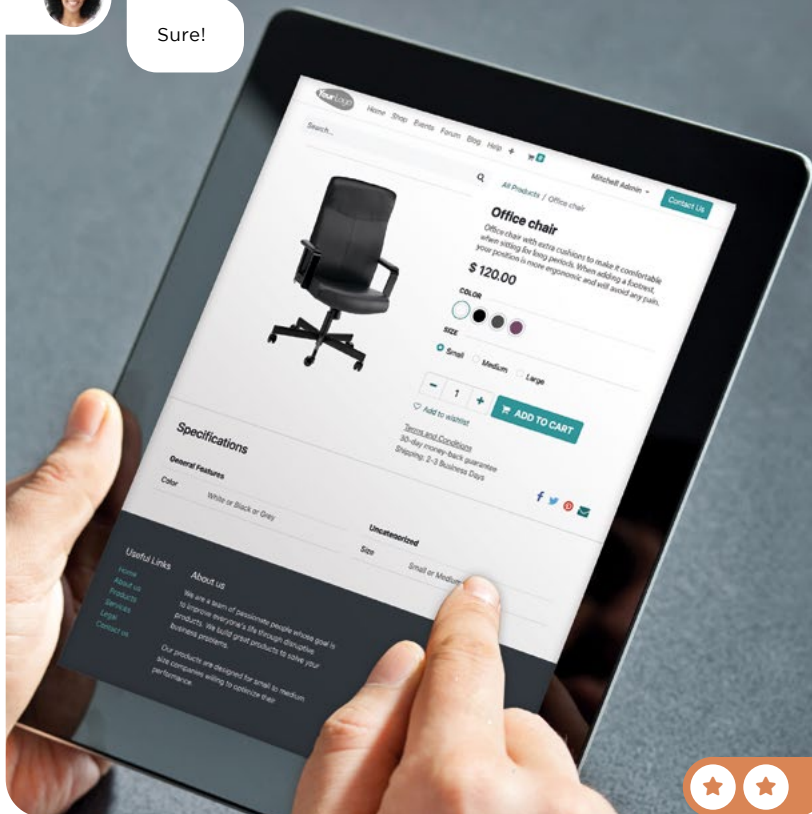
🌍 Go to Website

Office Chair

Office chair with extra cushions to make it comfortable when sitting for long periods. When adding a footrest, your position is more ergonomic and will avoid any pain.

$ 120.00

COLOR

⚪ ⚫ ⚫ 🟣

SIZE

🔘 Small   ⚪ Medium   ⚪ Large

[−] 1 [+]   🛒 ADD TO CART

🛒 1

Review Order ❯ Shipping ❯ Payment

🪑 **Office Chair**
Remove

[−] 1 [+]

$ 120.00

Subtotal:	$ 120.00
Taxes:	$ 18.00
Total:	**$ 138.00**

Checkout ❯

Review Order ❯ Shipping ❯ **Payment**

ℹ By default, Odoo suggests Stripe as the payment provider, but you can change the payment method by clicking on ➜ **Add payment providers**
You can then activate Paypal, or any credit card, by configuring one of the available payment providers (Authorize.net, Ayden, Mollie, Ogone, etc.).

Sophia • Sales Manager

Last month, we made $350k in revenue through the website, with an average cart size of $250. Can we cross-sell to customers by suggesting **optional** products?

You

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

Cross-sell to customers

6

Website　　　eCommerce ▸ Products　　　**New**

⭐ Warranty: 3 years

General Information	Attributes & variants	Sales

Product Type　Service　　　**Sales Price**　$50

New　**Products**
　　　Warran🖑 3 years

Office Chair
Price: $ 120.00 🖑

General Information	Attributes & variants	**Sales**

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 to add a warranty. You can use this cross-selling strategy by suggesting accessories and optional products. Upselling is also possible, by using alternative products.

⭐

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

Website   **+ New**

Page	Product	Blog Post

New Blog Post   ✕

Select Blog	News ▾
Title	New warranty service

Save

ⓘ 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   🛒⁰   👤 ▾   Contact Us

Discover our 3-year warranty

⌄

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 (re-)furnish their offices. To help your customers evaluate their needs, you decide to launch an Office Design service. For this new project, you will work with Audrey, an interior designer, who will make the designs for your prospects.

Install the 2 Apps required for the new office design project. It will follow this business flow:

Set up a project	1
Configure a product	2
Sell the design service	3
Schedule a meeting	4
Record timesheet	5
Plan the work	6
Timesheet on subtasks	7
Invoice customer	8

Install the apps

Apps

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

🔍 | ▼ Apps ✖ | Search... | ▼

ⓘ
Instead of installing apps one by one, you can switch to the list view ☰ in the App screen. Then, check multiple apps and install them all at once using the **Install** button.

	Module Name	Author	Website
☑	Project	Odoo S.A.	https://www.odoo.com/app/project
☑	Timesheets	Odoo S.A.	https://www.odoo.com/app/timesheet

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 **onsite meeting** to check their office and gather information. Then I prepare 2 or 3 **design proposals** for the style. Based on their feedback, I model a **floor plan**, then a sales rep does the **quotation** with the necessary service, and if it's confirmed, we start the **work**.

You

Ok, thanks. I'll create the stages and also set the email address "**design@**" on the project, to ease the creation of tasks and so customers have a direct contact.
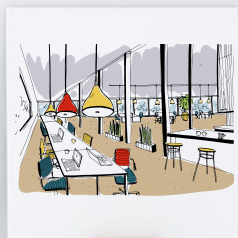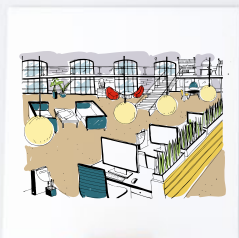
< ✔ **Project**

New

Create a project ✕

Name
Office Design

☑ | **Timesheets**
  | Log time on tasks

☑ | **Billable**
  | Invoice your time and material to customers

Create tasks by sending an email to design@myoffice-inc.odoo.com

Create project

ⓘ You can configure an email address for your project. A task will be created automatically in this project when you send an email to this address.

Onsite Meeting ⚙ + **Design** + **Floor plan** + **Quotation** + Work **Add**
0   0   0   0

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

★

Configure a product

Sophia • Sales Manager

Did you get the opportunity to think about the sales price of our service?

You

Yes, I checked our competitors and our expenses and I have settled on a price of **$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

< Sales **Products** ▶ Products **New**

Product Name
☆ **Office Design Service**

☑ **Can be Sold**   ☐ **Can be Purchased**

| **General Information** | Attributes & Variants | Sales |

Product Type Service ▾   **Sales Price** $50

ⓘ If **Product Type** is set as **Service**, the sales order can generate a task or a project. This 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.

⭐ ⭐

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 was amazed by our offer and confirmed the order right away!

You

Awesome! I'll check if the task has been created automatically for Audrey.

Sell the design service

Sales   Orders ▶ Quotations   **New**

Customer	The Jackson Group ▾

Order Lines	Optional Products	Other Information

Product	Qty	Unit Price	Taxes	Subtotal
Office Design Service	20.00	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**

ⓘ
A task has been generated automatically with this Sales Order. Navigate easily thanks to the links on the top of the screen.

	Projects 1	Tasks 1

You

You should have a new task for "The Jackson group" under the Office Design project. Can you schedule the initial meeting?

Audrey • Interior Designer

Sure! First, I'll star the task as a priority.

Then, I'll schedule a meeting with the customer next week. Once my meeting is done, I'll work on the design proposal.

< 🖌 Project

⭐ **Office Design**   ⋮

✉ design@myoffice-inc.odoo.com

1 Tasks

Onsite Meeting   +

1

Jackson Group   ⋮

⭐ 🕐

ⓘ

Click on ⚪ to mark the task as:

🟢 Approved

🟠 Changes requested

Schedule activities to help you get things done.

+ Schedule an activity

Activity Type   Meeting ▾

Summary   Initial meeting

Open Calendar

ⓘ

Click *Open Calendar* to schedule the meeting directly from your agenda.

ⓘ

You can also schedule a meeting from the chatter of the task.

🕐 Activities

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 Designer

Ok, I've been working on the design for the past 2 hours. I'll log the time I spent.
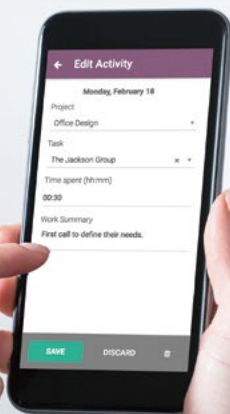
< ⏱ **Timesheet**

▶ START	02:03:22 ┈┈┈▶	■ STOP

Office Design ▼   S00002 : Office Design S... ▼   Working on the Design

		Mon,	Tue,	Wed,	Thu,
a	Office Design / S00083: Office De...	0:00	0:00	0:30	0:00

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

ⓘ
Timesheets can be created in 2 ways: via the timer on the grid ("**Start**" button) or directly from the task. Both methods provide the same result.

Description	**Timesheets**	Sub-tasks

Date	Employee	Description	Hours Spent ⇅
07/18/2023	⬜ Michell Admin	1st draft design	02:00 🗑

Add a line

Audrey • Interior Designer

I just had The Jackson Group on the phone. They validated the design! They've confirmed that we can in 2 weeks.

I will split the onsite work into **2 sub-tasks**. One will be for painting walls and floors, and the other for installing furniture.

You

Good idea!

Audrey • Interior Designer

I will **allocate 11 hours** (1.5 days) for **walls and floors** and **7 hours** (1 day) for the **furniture** task.

You

You can set up the **planned dates** at the same time. And don't forget to move the Jackson Group **task to the "Work" stage**.

< 🖌 **Project**

⭐ **Office Design**   ⋮

2 Tasks 🕐   ▢ ⬤

▸

| S00002 - Office Design Service ⋮ |
| ☆ 🕐 [18:00] ⬤ |

New | **In Progress** | ...   ▸

Done 👆
Canceled

| Description | Timesheets | **Sub-tasks** |

	Title	**Assignees**	⚙
⠿ ☆ ⬤	Walls and floors		View task 👆 🗑
⠿ ☆ ⬤	Furniture		View task 🗑

☆ Office Design Service

Project	Office Design	**Customer**	The Jackson Group
Milestone	e.g. Product...	**Allocated time**	11:00 (0%)
		Planned Date	*Date in 2 weeks*

⭐

Bonus Point • Get an extra ⭐ if you have added the allocated hours on both subtasks.

ℹ

≡   Once you set up the Planned Dates of your tasks, they will be visible in the Gantt view of the Project. It's the perfect place to plan and dispatch tasks. With extra configuration, you can have task dependencies, which are used to define interrelationships between tasks. They determine the order in which tasks must be performed.

⭐ ⭐

3 weeks later - You

How did the painting job go last week?
Is the "Walls and floors" sub-task done?

Audrey • Interior Designer

Yes, Ernest, our new colleague, was busy delivering the material for 2 hours. The floor took him 5 hours and, he finished painting everything in 4 hours.

Yesterday, we spent the day assembling and placing the furniture according to the plan!

You

Great! Don't forget to timesheet all the jobs and to mark the subtasks as Done!

| Start | **Onsite meeting** | Design | Floor Plans | Quotation | Work |

☆ Walls and Floors

Project   Office Design   **Customer**   The Jackson Group

                                    Allocated time   11:00   (0%)

| Description | **Timesheets** | Sub-tasks |

Employee	**Description**	**Hours Spent** ⇄
☐ Ernest		

> Create "Ernest"
> Create and Ed...

| Description | **Timesheets** | Sub-tasks |

Employee	**Description**	**Hours Spent** ⇄
👤 Ernest	Material	02:00 🗑
👤 Ernest	Working on the floor	05:00 🗑
👤 Ernest	Painting	04:00 🗑

Add a line

ⓘ Remember that there is 2 ways to record timesheets. Do it directly from the **Project** app by going to the **Timesheets tab** in your tasks or open the **Timesheets app**. If you make a mistake, you can always edit the time spent.

S00002 - Office Design Service ⋮		● Approved
☆ 🕐 [18:00]		❌ Cancelled
		✔ ✅ Done

★

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 them and validate them.

keep it
simple.

< 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 Draft Invoice

Product	Quantity	Price	Taxes	Subtotal
Office Design Service	18.00	50.00	15%	$ 900.00

Confirm   ▶   Draft   **Posted**

ⓘ Since you only worked 18 hours on the project and your services are invoiced based on Timesheet, only 18 hours will be invoiced in this period.

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

Install the apps

Apps

Manufacturing
Manufacturing Orders & BOMs

⋮

Activate

Apps

Quality
Control the quality of your products

⋮

Activate

Manufacturing   **Configuration** ▸ Settings

Operations

☑ | **Work Orders**
Process operations at specific work centers.

Save

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) and 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
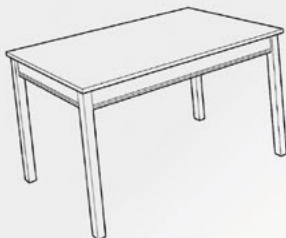
New

☆ 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.

| Attributes & Variants | Sales | Purchase | **Inventory** |

Routes ☑ Manufacture

🧪 **0**
Bill of Materials

▸ **New**

ⓘ The BoM is also accessible from 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

⭐

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

Looks good, I'll make a new purchase order in our system, and I'll confirm the order!

Offer 2022/0123

Request for Quotation PO00100

Only Woods

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

Expected Date
01/16/2019 12:56:26
01/16/2019 12:59:24
01/16/2019 12:5

Description
RN, 9522] Table Top
2333] Table Leg
77] Bolt

< Purchase

New

Vendor	Only Woods Inc. ▼			

Products | Other Information

Product	Quantity	Unit Price	Taxes	Subtotal
Table Top	100	40.00	15%	$ 4,000.00 🗑
Table Leg	400	12.00	15%	$ 4,800.00 🗑
Bolt	400	0.50	15%	$ 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 might not have the same tax rate as the one in the example.

Confirm Order ▶	RFQ	RFQ Sent	**Purchase Order**

ⓘ You can get the best prices by making a **Purchase alternative**.

Products	Other Information	Alternatives

⭐

Receive products

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.

‹ 🔶 **Inventory**

ⓘ

Receipts ⋮

1 To Process
🖑

Another way to access the Receipts from the Purchase order is to click on the **truck button** or on the button "**Receive Products**".

🚚 Receipt
1

Receive Products

Reference	Contact	Source Document	Status
WH/IN/00002 🖑	Only Wood Inc.	P00002	**Ready**

WH/IN/0002

Receive From   Only Wood Inc. ▾

Operations	Additional Info	Note

Product	Demand	Done
Table Top	100.000	80.000
Table Leg	400.000	400.000
Bolt	400.000	400.000

Validate

You have processed less products than the initial demand.

Create Backorder

⭐

Manufacture 3 tables

4

You

Ernest, we should have all the materials we need to start producing the desks. Can you **launch the production of 3 tables** for the showroom?

Ernest • Worker

I'm on it.

Manufacture 3 tables

4

< Manufacturing **Operations** ▶ Manufacturing orders   **New**

Product	Table ▾
Quantity	3.00 Units ▾ **To Produce** 🏭
Bill of Material	Table ▾

Confirm   ▶   Draft ⟩ **Confirm** ⟩ Done

Quantity   3.00 / **3.00** Units **To Produce** 🏭

ⓘ

Based on the **Component Status**, you can double check the availability of components before production.

Component Status   Available

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

Produce All   ▶   Draft ⟩ Confirm ⟩ **Done**

⭐

Operations & work centers 5

Sharlene • Manufacturing Engineer

I plan to better organize the manufacturing line by having **2 work centers**: **Assembly Station** and **Painting Room**. Can we set up a tablet with instructions on each station?

You

Sounds like a good idea. **From the Bill of Materials** of the Table, I'll create **2 operations**: a **60 minute Assembly** operation in the **Assembly Station**.

And a **60 minute Painting** job in the **Painting Room**.

Sharlene • Manufacturing Engineer

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

Manufacturing   **Products** ▶ Bill of Materials

Product	BoM Type
Table	Manufacture this product

Components	**Operations**	Miscellaneous

Operation

Add a line

Operation   Assembly

Work Center   Assembly Station ▾

Work Sheet
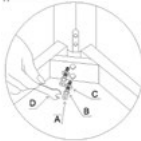
Save & New

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

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 go to the **Shop Floor** application and process the manufacturing operations from there. I'll start with the **Assembly Station**, then I'll continue with the table in the **Painting Room**.

Plan an order

6

Manufacturing → Operations ▸ Manufacturing Orders   **New**

Product	Table
Quantity	1.00 Units **To Produce**
Bill of Material	Table

Confirm   ▸   Draft   **Confirm**   Done

Shop Floor   ▸

☑ Assembly Station   ✕
☑ Painting Room

Confirm

WH/MO/00011 - Assembly To Do
Table - 1 Units

Worksheet   ♀
Register Production   1 Units

Mark as Done   ⋮

WH/MO/00011 - Assembly 00:12
Table - 1 Units

Worksheet   ♀
Register Production   1 Units

Mark as Done   ⋮

WH/MO/00011 - Assembly To Do
Table - 1 Units

Worksheet   ♀
Register Production   1 Units

Close Production   ⋮

Add a quality check

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** on the Work Order Operation **Assembly** to measure the torque, by using the **Quality app**.

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

Add a quality check

➡ **Close**

< 🔷🔍 **Quality**   **Quality Control** ▸ Control Points   **New**

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 ✕ ▾	**Type**	Measure ▾
Operations	MyOff.: Manufact. ✕ ▾	**Norm**	13.00	Nm
Work Order Operation	Assembly ▾	**Tolerance**	from 11.00 to 15.00
		Step Document	⦿ Specific page of Op...
		Worksheet Page	3

ⓘ **Specific Page of Operation Worksheet** allows you to designate the right page of the worksheet when it's time to perform quality control.

Quality Control Points
⚙ ☁ ↺

⭐ **Bonus Point** • Get an extra point if you thought about clicking on the ☁ icon.

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

Check your quality test

You

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

Sharlene • Manufacturing Engineer

That's good. We have to **create a new table**. I'll take the opportunity to test executing the **work order via the Shop Floor app**.

You

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

Check your quality test

< Manufacturing Operations ▶ Manufacturing orders | New

Product	Table	▼
Quantity	1.00 Units	**To Produce** 📊
Bill of Material	Table	▼

Confirm ▶ | Draft **Confirm** Done

Shop Floor ▶ | Assembly Station 1

WH/MO/00002 00:12
Table - 1 Units

Torque Settings ↔
Register Production 1 Units

⋮

WH/MO/00002 ✕

Torque Settings

Measure: 12.00 mn

Validate

Painting Room 1

WH/MO/00002 01:09
Table - 1 Units

~~Torque Settings~~ ✓
~~Register Production~~ 1 Units

Mark as Done ⋮

WH/MO/00001 To Do
Table - 1 Units

Worksheet 💡
Register Production 1 Units

Close Production ⋮

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 BoM overview for the theoretical costs.

➡ **Close**

Manufacturing   **Products** ▸ Bills of Materials

☐ **Product**	**BoM Type**
☐ Table	Manufacture this product

≡ **BoM Overview**

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 smartphone 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 play the game while using your computer in parallel.

Configure the 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

Install the app

Apps

Barcode
Use barcode scanners to process logistics operations.

Activate

⋮

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

ℹ️ All the barcodes needed for the following exercises are here.
Keep this card near you.

WH-RECEIPTS

DESK12345678

O-BTN.validate

WH-STOCK

O-BTN.pack

ZONEA

Configure the scanner

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

Open a text editor on your computer and **scan this barcode** to make sure it works.

IT WORKS!

Configure the scanner

1

⚠️

If you don't have a barcode scanner, you can use your smartphone
(see instructions on the front of the introduction card).

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.

If you use a barcode scanner

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.

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

It works!

ⓘ

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.

⭐

Set up your product

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.

Set up your product

Inventory   **eCommerce** ▸ Products   New

Large Desk ☆
Price: $ 220.00
On hand: 7.00 Units

Product Name

☆ Large Desk

| General Information | Attributes & variants | Sales | Purchase |

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.

⭐

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.

< |||| **Barcode**

1 Initiate a receipt.

WH-RECEIPTS

ⓘ On your smartphone, click on ||||||. From there, you can either type the barcode reference or use your camera to scan.

2 Scan the product, 3 times.

DESK12345678

ⓘ You can also add more quantities of a product by tapping on **+1**

3 Validate the transaction.

O-BTN.validate

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, right?

Brandon • Customer

That's correct!

Sales   Orders ▸ Quotations   **New**

Sales

Customer   Azure Interior, Brandon ▾

Order Lines	Optional Products	Other Info	Notes

Product	Quantity	Unit Price	Taxes	Total
Large Desk	3.00 📊	220.00	15% ✕	$ 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**

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

Inventory   **Configuration** ▸ Settings

Operations

☑   **Packages** ❓   **Save**
     Put your products in packs (e.g. parcels, boxes) and track them

‹ ▐▐▐▐   **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

ℹ 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 ★   ★ ★

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 scrapped one of the desks.

Adjust inventory

▊▊▊ Barcode

Inventory Adjustments

1 Scan 3 times

DESK12345678

2 Validate the inventory

O-BTN.validate

Define locations

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.
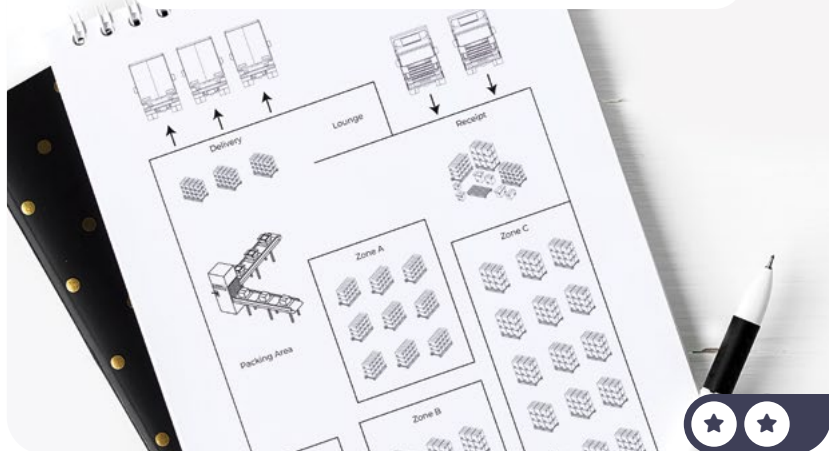
< Inventory **Configuration** ▶ Settings

Warehouse

☑ | ### Storage Locations ❓
Track products location in your warehouse.

Save

Inventory Configuration ▶ Locations **New**

ZoneA
_____

Parent Location
WH/Stock ▾
_____

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

Location Type Internal Location ▾ **Barcode** ZONEA

↻ Repeat this opeation to create the 2 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.

★

You

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

Can you move 3 Large Desks from the location WH-STOCK to ZoneA?

Sharlene • Manufacturing Engineer

Ok, I'm on it.

Move products

< ▍▍▍ 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

Manage
your team

Now that you have set up a business management software, operation flows are automated and your business grows! There are more and more demands, so you need to hire more people. As the CEO of the company, you start the recruitment yourself.
Install the Apps required for the following business flow.

Create a job description	1
Refer a friend	2
Make an offer	3
Add the employee in the system	4
Evaluate your employee	5
Schedule your time off	6
Submit an expense	7

Install the apps

Apps

Recruitment
Track your recruitment pipeline

Activate

⋮

Do the same for all of those applications :

Referrals ✓	

- Referrals ✓
- Time Off ✓
- Appraisals ✓
- Employees ✓
- Expenses ✓

ⓘ The Referral App automatically installs the Website App so it gives you the opportunity to share the job position with a friend.
If you don't want to spend time creating a website now, you can simply click on the bottom right corner on the button "Go to Frontend". Note that if you plan to play the Sell Online use-case after, you will have to create your website from scratch (with no template).

ⓘ To install the **Salary Configurator** module, search for *hr_contract_salary* and make sure to remove the "Apps" filter in order to find it.

🔍 | **Module** | hr_contract_salary ✖ | Search... | ▾

Create a job description

1

Eli • Marketing Manager

Hello, as discussed, I'd like to start the recruitment of the Marketing Community Officer.

You

Yes, could you please send me more details about the profile you are looking for?

Eli • Marketing Manager

Of course, here are the skills we need:
- Marketing Diploma
- Fluent in English and German or Spanish
- Planning and execution of email marketing
- Experience in social media moderation

You

Ok thanks, I'll create the job description, set the email address "marketingcommunityofficer@" on the job position, and publish it.

Create a job description

Recruitment

New

Create a Job Position ✕

Job Position   Marketing and Community Officer

Application email   marketingcommunityofficer@myoffice-inc.odoo.com

---

Create   **Discard**

ⓘ

The domain name of the email address is the name of your database.

⭐ **Marketing and Community Manager**   ⋮

Configuration

| Recruitment | **Job Summary** |

The Marketing team is looking for someone who has:

- Marketing Diploma
- Fluent in English and German or Spanish
- Planning and execution of email marketing
- Experience in social media moderation

ⓘ

Don't forget to publish your job offer on your website.   ✅ **Published**

⭐

Audrey • Employee

Hey! I saw your job description for a Marketing and Community Officer, is the position still available? I'd like to make a **referral** for my brother-in-law, Jeffrey Kelly, he is very interested and skilled.
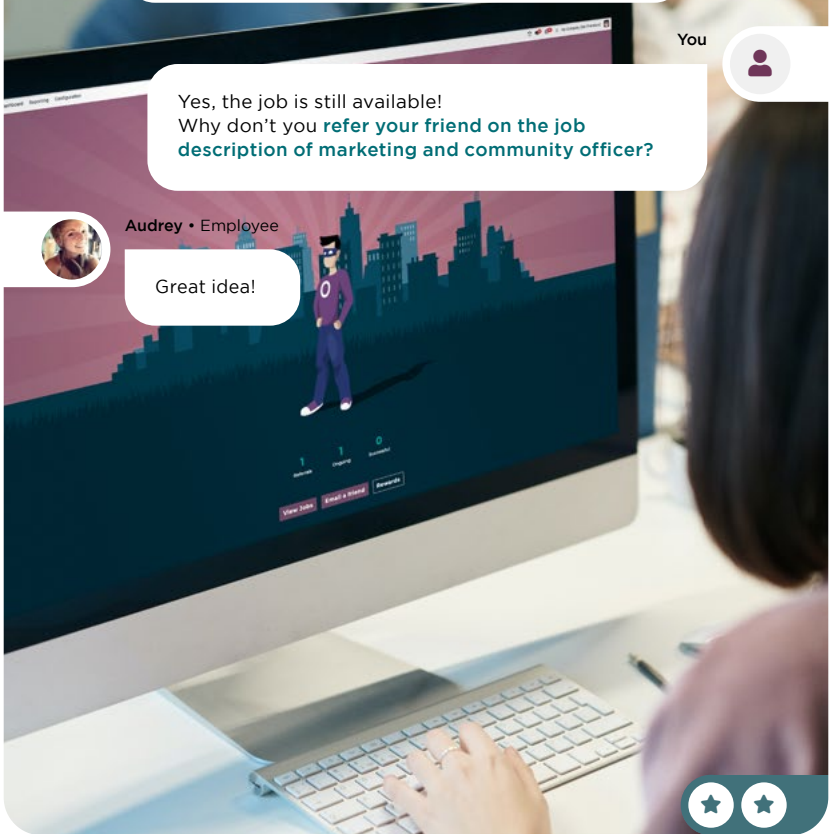
You

Yes, the job is still available!
Why don't you **refer your friend on the job description of marketing and community officer?**

Audrey • Employee

Great idea!

Refer a friend

Referrals   **Next ›** ▸ **Start Now** ▸ **View Jobs**

Marketing and Community Officer

1 Open Position   ⭐ 85 Points

The Marketing team is looking for someone who has:

- Marketing Diploma
- Fluent in English and German or Spanish
- Planning and execution of email marketing
- Experience in social media moderation

Refer Friend   **More info**

Send Job Offer by Mail   ✕

Email   *Put your email address here to see the referral*

Subject   Job for you

Body   Hello,
               There are some amazing job offers at my company!
               Have a look, the might be interesting to you.
               See Job Offers

Send Mail   **Cancel**

ℹ️ You can also share a job position by copy/pasting the generated link or via your preferred social media.
If you click on Email a friend from the home page of the Referral app,
you'll send to your friend all the jobs available in your company.

Make an offer

Eli • Marketing Manager

The interview with Jeffrey Kelly was great! I'll be happy to have him in my team! Can you make him an offer?

You

Great! I'll **move** him to the **Contract Proposal** status. Then I'll **generate an offer** and **send it** to him **by email.**

Eli • Marketing Manager

Oh you can do this with Odoo? How?

You

Yes, I have to create a new **Offer Template** for **Marketing Officer**. As discussed, it will be a **yearly cost of $29,000** for a **full-time contract**.

Eli • Marketing Manager

Perfect, I'll call him to announce the great news and that he'll receive the offer by email.

Before generating your offer, you need to configure a contract template with the following information in the configuration of the Employee app: reference of the contract, the HR Responsible, and the Yearly Cost (Real).

Recruitment

Marketing and Community Officer

PUBLISHED

1 New Application   1 To Recruit

✓ Published

⚠ In order to see "**1 New Application**", you need to apply to the Marketing and Community Officer position. You can reply to the email sent for "**Referral**".

| Second Interview | + | Contract Proposal | + |

Jeffrey Kelly

★★★

Generate Offer

Generate a Simulation Link   ✕

Offer Template	
Job Position	Your template	munity Officer
Job Title	Marketing and Community Officer

Generate   Discard

★

Eli • Marketing Manager

I've heard that Jeffrey is in the stage of **signing his contract**?

You

Yes! I'll just **create an employee** file for him with the info from his resume and assign **you** as his **manager**.

I'll also set 2 **home working days** for Wednesday and Thursday and the rest at the **office**.

So he is officially part of the company, yay!

Jeffrey Kelly
Business mobile:
456 065 8856

Recruitment

Marketing and Community Officer

PUBLISHED

⋮

| 1 New Application | 1 To Recruit |

✅ **Published**

Jeffrey Kelly

⭐ ⭐ ⭐   👤

> **Contract Proposal** > Contract Signed 👆

Create Employee

Jeffrey Kelly
Marketing and Community Officer

📷➕

Manager   Eli Lambert |

> **Create "Eli Lambert"**

ℹ️

Audrey is happy for her brother-in-law but also because the application Referral allows her to earn several points. Those points can then be transformed into gift vouchers for example, depending on the company policy.

⭐

Evaluate your employee

5

Eli • Marketing Manager

Hello, while I think about it, can you **create an appraisal** for **Jeffrey** and put **me** as **manager** please?

You

Yes, I'll set the evaluation date as **6 months from now** and then **confirm** the appraisal.

Eli • Marketing Manager

Amazing! Could you also make sure that other employees who collaborated with Jeffery can give their feedback too?

You

Sure! I'll **ask for feedback** on the appraisal.

Appraisal   New

Jeffrey Kelly

Manager   Eli Lambert

Appraisal Date   *6 month from today's date*

| Appraisal | Skills | Private Note |

Employee's Feedback

Self Assessment will
show here once published.

Manager's Feedback

Manager Assessment will
show here once published.

Confirm ▸   To Confirm   **Confirmed**   Done ▸ Ask Feedback

Ask Feedback   ✖

Survey Template

Recipients   Add employees...

Subject

Send

Schedule your time off

Jeffrey • New employee

Hello, when I signed the contract, I talked about taking **3 days off in June**, do you remember?

You

Yes, that's right!
First, I'll **manage** your **paid time off** by creating a **new allocation** of **20 days valid until the end of the calendar year**.

Then, you can create a **new time off** for June with your **Paid time off**.

Time Off — **Management** ▶ Allocations — **New**

Paid Time Off

Time Off Type	Paid Time Off	
Validated Period	*Today's date*	→ *Put the end of the calendar year*
Allocation	20.00 Days	

Validate

To Submit › To Approve › **Approved**

Time Off — **New**

New Time Off ✕

Time Off Type	Paid Time Off	
Dates	*Day 1*	→ *3 days later*
Duration	3.00	Days

Save & Close

ⓘ You can also record your days off via the Employee app. From the Employee's record, click on the Time Off button on the top menu.

📅 **Time Off**
17/20 Days

Submit an expense

Eli • Marketing Manager

Hello, I just came back from Jeffrey's **welcome lunch** with the team. Here is the **ticket with a total of $102.55**, can you validate it?

You

Ok Eli, now that we have a nice business management software, you can use the **Expense app**.
It will ease the accounting department.

Make sure to make a **New expense, create a report** (even if there's only one) and **submit to your manager** (me ;-))
I will **approve it**.

Expenses

New

Description
Welcome Lunch for Jeffrey

Category	[FOOD] Meals
Total	$102.55
Employee	Eli Lambert
Paid By	● Employee (to reimburse) ○ Company

ℹ From the **Attach Receipt** button, you can add a picture of the bill.

Create Report ▶ | **To Submit** | Submitted | Approved | Posted | Done

Submit to Manager ▶ | To Submit | **Submitted** | Approved | Posted | Done

Approve ▶ | To Submit | Submitted | **Approved** | Posted | Done

Close *new deals*

Until now, you have been using an Excel sheet to organize information belonging to past, present and future clients. However, with the recent boom in business, you are finding it increasingly difficult to stay organized with all the new clients coming in! To help solve this issue, you decide to invest in a Client Relationship Management system, otherwise known as a CRM.

Install the CRM App to run the following business flows.

Import ongoing leads	1
Generate leads	2
Create a new opportunity	3
Send a quotation	4
Provide a discount	5
Organize your CRM	6
Close the deal	7
Analyse expected revenue	8

Install the app

Apps

CRM
Track leads and close opportunities

Activate

You

Hi Sophia! I'm setting up the new CRM. Can you send me the Excel spreadsheet with all our current clients? I'll import them into the CRM system now, you should see them appear in no time.

Sophia • Sales Manager

Hi there! Fantastic news! Here is the list of our ongoing leads. https://www.odoo.com/r/ongoingleads. Just remember, the contacts don't exist in this system yet

You

Oh you're right! So, I will select "create new values" when the error pops up.

CRM   Pipeline ⚙   ▶   ⚙

⬇ Import records
...

Upload file   ⬇   Select the file **Ongoing leads CRM.csv** you downloaded on **https://www.odoo.com/r/ongoingleads**

Customer *Mike G.*	⬍ Customer ✕ ⬍
Email ...	Ab Email ✕ ⬍
Internal notes *Mike G. was very interested...*	🌐 Notes ✕ ⬍

Test

Not maching record found for the following name in field Customer:
...

When a value cannot be matched:

Create new values ⌄

Prevent import
Set value as empty
Skip record
Create new values

Import

Sophia • Sales Manager

Hey, we have a problem, the leads we have are only enough for a couple of our sales people. Others don't have leads to work with.

You

Don't worry, I'll generate leads in the CRM app and get new leads for you.

Sophia • Sales Manager

Sounds great, let's get 10 more leads within the U.S in our pipeline. Specifically, leads within Retailing, Healthcare Equipment and Services and Real Estate.

CRM

Generate Leads

Need help reaching your target?

How many leads do you need?

10   Companies

Countries   United States ×

Industries   Retailing ×   Health Care Equip... ×   Real State ×

Generate Leads

Create a new opportunity

Sophia • Sales Manager

The CRM looks great! Our pipeline is full now! I'll assign my team members on those. By the way, I met **Kary Maxwell** at the Furniture Expo yesterday. Here is her business card. She's interested in purchasing **6 tables**! I think she should be considered a **high priority** in the pipeline.

You

Great! Thanks, I'll **schedule a call for this afternoon**!

Kary Maxwell

karym@agrolait.com
(123) 456-7899

CRM

New

Organization / Contact?
Kary M.

Opportunity
Kary M.'s opportunity

Email
karym@agrolait.com

Phone
(123) 456-7892

Expected Revenue
$ 1,320.00 ⭐⭐⭐

Add

Kary M.'s opportunity
$ 1,320.00
Kary M.

⭐⭐⭐ 🕐

+ Schedule an activity

Schedule Activity

| **Activity type** | Call | **Due Date** | today's date |
| **Summary** | Discovery Call | **Assigned to** | 👤 Mitchell A |

Call to discuss her interest in our products. See if she would be interested in other products.

Save

| New | Qualified | **Proposition** | Won |

CRM

Kary M.'s opportunity

$ 1,320.00
Kary M.

★★★ 🕐

New Quotation

Customer   Kary M.   ▾

Order lines | Optional Products

Product	Quantity	Unit Price	Tax excl.	
Large Desk	6.00	220.00	$ 1,320.00	🗑

Add a product

ⓘ You can send it by email.

Send by Email ▸ | Quotation ⟩ Quotation Sent ⟩ **Sales Order** ⟩

Send message | **Log note** | ⊕ **Activities**

👤 Call with Kary went well. She is interested in purchasing 6 tables and hopes to have them delivered within 1 month.

☺ 🔗   ⤢

Log

⭐

Provide a discount

Kary • Prospect

Hello, thank you for the quote.
Would you be willing to make a commercial gesture of offering us a 10% discount?

You

Hi Kary, we can provide a **5% discount**.
What do you think?

Kary • Prospect

Thanks, a 5% discount sounds good to me. Please **resend me the revised quote**, I should have a decision in 2 days.

You

Ok, I will do this. I'll also **set a reminder** to touch base with you **by email** in **2 days**.

Activate the Discount Option in the app:
Sales ▸ Configuration ▸ Settings ▸ Pricing: ☑ Discounts

CRM

Kary M.'s opportunity
$ 1,320.00
Kary M.
★★★ 🕐

Order lines	Optional Products

Product	Quantity	Unit Price	Disc. %	Tax excl.	
Large Desk	6.00	220.00	5.00	$ 1,320.00	🗑

Send by Email

Send message   **Log note**   🕐 **Activities**

Schedule Activity

Activity type	Email	**Due Date**	in two days
Summary	Send email	**Assigned to**	👤 Mitchell A

Touch base with Kary by email.

Schedule

Sophia • Sales Manager

Hello, to organize the pipeline, we should create stages to fit our processes. I think it would be wise for us to create a stage called "Waiting for feedback" for customers whom we sent a quote already.

You

That's a good idea. I'll go ahead and do that now! I'll move Kary's opportunity to that stage as well.

&model=crm.lead

figuration

Waiting for Feedback

79,100

0

Kary M.'s opportunity
$ 1,320.00
Kary M.
★ ★ ★ 🕐

CRM

+ Stage

New		Qualified	Proposition	Won	Waiting	**Add**
0		0	0	0		

Waiting for Feedback   **+**

1,386

Kary M.'s opportunity
$ 1,386.00
Kary M.
★ ★ ★ 🕐

Won

You • Two days later

Hello Kary! Just wanted to touch base and see if you would like to move forward with the quote.

Kary • Prospect

Hello! Thank you for following up. The quote looks good to us and we would like to proceed with the order. Can you set the delivery for 2 weeks from now?

You

Sounds good!

Kary M.!s opportunity

$ 1,320.00
Kary M.

★ ★ ★ ⏱

| Won | ▶ | Proposition | Waiting for Feedback | **Won** |

📝 Quotations
1

Number	Customer	Total	Status
S00001	Kary M.	$ 1,254.00	**Quotation Sent**

Confirm ▶ 🚚 Delivery 1 ▶ **Scheduled Date** date in two weeks

Sophia • Sales Manager

Our pipeline is looking great! I've got a meeting with the sales team. I'm looking for the Expected Revenue Report. Can you help me here?

You

Yes, from our current pipeline, you can download the report. Use the pivot table view, it's more clear that way.

CRM   Reporting ▶ Pipeline

Measures ▼   Insert in Spreadsheet

✓ **Expected Revenue**
  Prorated MRR
  Prorated Recurring ...

Measures ▼   Insert in Spreadsheet   ⇄ ✛ ↧

Digitalize
Accounting

Your business is booming and so is your paperwork! After analyzing the time and effort you spend on managing and archiving invoices, you decide to go paperless. So you plan to digitize all invoices to become more efficient and save office space.

Install the App Documents.

Look for alternative Vendors	1
Compare received offers	2
Purchase Large Desks	3
Receive Products	4
Import vendor bills	5
Prepare vendor bills for validation	6
Validate vendor bills	7
Register payments	8
Do the bank reconciliation	9
Analyze the partner ledger	10

⭐ ⭐

Install the app

Apps

Documents
Document management

Activate

Look for alternative vendors 1

Marc • Purchase Manager

Sophia has just sold **15 Large Desks** to Boogle in Los Angeles. They need them within 2 weeks and we only have 7 Desks in stock!

Also, Wood corner has recently increased the purchase price for the Large Desk by 20%. That seems too expensive to me !

You

Indeed, it's clear we need to compare different suppliers. I suggest we order 15 and keep the other 7 as reserves. Marc, have you already explored the market?

Marc • Purchase Manager

Yes, I searched and found **3 new** candidate **vendors: Fast Desk, AEKI Inc., Mesa Design.**

You

I'll **create a request for quotation** for prices for **1 Large Desk** and for minimum **10 Large Desks** to the vendor **Fast Desk**.
With the help of **Alternatives**, I'll create a call for tender to obtain the prices for Mesa Design and AEKI Inc.

Before creating alternatives, you need to activate Purchase Agreements in the Purchase Settings.

Purchase   Configuration ▸ Settings

Orders

☑ | ## Purchase Agreements ❓
Manage your purchase agreements (call for tenders, blanket orders)

Save

Purchase   Orders ▸ Request for Quotation   **New**

Vendor   Fast Desk

| Products | Alternatives |

Product	Quantity	Unit Price
Large Desk	1.00	0.00
Large Desk	10.00	0.00

| Products | Alternatives |

⧉ **Create Alternative**

Create alternative

Vendor   Mesa Design   Copy Products ? ☑

Create Alternative

Repeat this operation for the last vendor Aeki Inc.
You'll see that the Request for Quotation duplicates with a different vendor name.

If you have the vendors' email address, you can send the quotation directly
from the system to the vendor.

Compare received offers

2

Marc • Purchase Manager

Look, we received the prices and delivery times from the candidate vendors.

You

Thanks, I'll add the information to the request for quotation of each vendor candidate.
Then, via Alternatives, I'll compare the product lines.

Company
Fast Desk

Price:
1 Desk   = $ 135
10 Desks = $ 105

Expected Arrival date :
next week

Company
AEKI Inc.

Price:
1 Desk   = $ 130
10 Desks = $ 100

Expected Arrival date :
3 working days

Company
Mesa Design

Price:
1 Desk   = $ 125
10 Desks = $ 90

Expected Arrival date :
next week but only for 10 desks

Compare received offers

2

Purchase

Reference	Vendor	Order deadline	Total	Status
P00002	Fast Desk	Today	$ 0.00	RFQ

Vendor Far Desk   **Expected Arrival** *in 3 working days*

Products	Alternatives

Product	Quantity	Unit Price	
Large Desk	1.00	135.00	↺
Large Desk	10.00	105.00	↺

Fill in the two order **Request for Quotation** for **Mesa Design** and **AEKI Inc**.

Products	Alternatives

📊 **Compare Product Lines**

Purchase large desks

You

Looking at the product lines, we'll buy 10 desks at Mesa Design, given their best price and order the remaining 5 at Aeki Inc. in order to meet our best delivery time.
Looks like Fast Desk is too expensive.

Marc • Purchase Manager

Perfect! Can you take care of it?

You

From the Comparison table, I'll clear the order lines I don't need.
Then, I'll modify the quantities in the request for quotation for Aeki Inc. Then, I'll confirm the orders.

Description	Expected Arrival	Quantity	Unit Price
Large Desk	*In 3 working days*	1.00	130.00
Large Desk	*In 3 working days*	0.00	100.00
Large Desk	*Next Week*	0.00	125.00
Large Desk	*Next Week*	10.00	90.00
Large Desk	*Next Week*	0.00	135.00
Large Desk	*Next Week*	0.00	105.00

Purchase   Orders ▶ Request for Quotation

Vendor   AEKI Inc.

Products	Alternatives

Product	Quantity	Unit Price
Large Desk	5.00	130.00
Large Desk	0.00	100.00

Confirm Order

ⓘ

Keep Alternatives   keeps the alternative purchase orders open,
so they can still be accessed if any additional product
quantities need to be ordered.

ⓘ

Cancel Alternatives   automatically cancels the alternative purchase orders.
Once all products are ordered, Cancel Alternatives
can be selected from whichever PO is open. ★

Inventory

Receipts ⋮

2 To Process

Reference	Contact	Scheduled Date	Status
WH/IN/00012	AEKI Inc.	In 3 days	Ready
WH/IN/00012	Mesa Design	In 7 days	Ready

WH/IN/00012

Receive From   AEKI Inc.

Operations	Additional Info	Note

Product	Demand	Done	
Large Desk	5.00	5.00	🗑

Validate

Repeat for Mesa Design.

Import vendor bills

Paul • Secretary

Hi, we've received several vendor bills this morning. One for AEKI Inc.: https://www.odoo.com/r/billAEKI and one for Mesa Design: https://www.odoo.com/r/billMesaDesign. You said you want to go digital, what should I do with those?
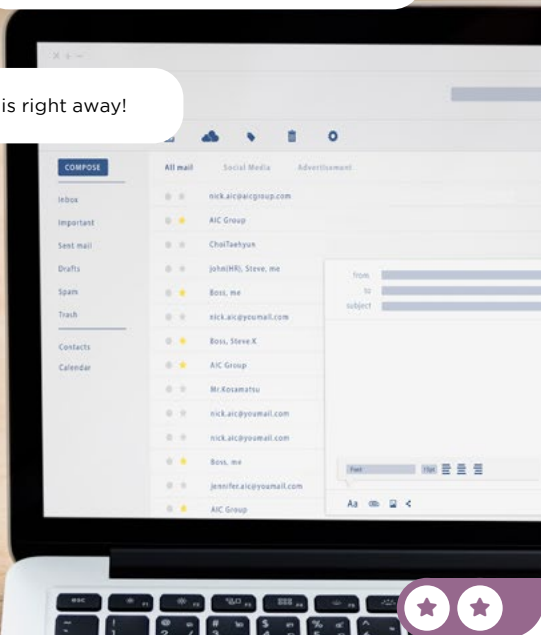
You

Send them to the document inbox via "inbox@yourdomainname.odoo.com" for further treatment.

Paul • Secretary

Sure, I'll do this right away!

Vendor Bills — ⤢ ✕

inbox@yourdomainname.odoo.com

Subject

Mesa_Design_Vendor_Bill.pdf (47K) ✕

AEKI_Inc_Vendor_Bill.pdf (48K) ✕

Send

Prepare vendor bills

6

Paul • Secretary

Did you see? There are two bills to move to the Finance workspace.

You

Yes, don't forget to add the tag 'to validate' so the accounting department knows they need to create the vendor bills in the system.

Documents

📁 WORKSPACE ▶ Finance

AEKI Inc v2.pdf
To Validate

Mesa Design V2.pdf
To Validate

📁 WORKSPACE   Finance ▾

🏷 Tags   Status > To Validate

You

Anita look, there are two new **vendor bills** to validate in the finance workspace for: **Mesa Design and AEKI Inc**. Can you **create** them **manually** in our system?

Anita • Accountant

I'm on it. Can you check and confirm them?

You

Of course! I'll do it right away.

Accounting

Vendor Bills ⋮

Upload

Create Manually

Vendor	Mesa Design
Auto-Complete	▼

P00020: $ 900.00

Search More...

Invoice Lines	Journal Items	Other Info

Validate

Repeat for AEKI Inc.

Instead of creating bills manually, use **Optical Character Recognition (OCR)** to recognize and extract data from scanned documents and images, feeding it automatically into Odoo to eliminate the need for manual data entry. Try OCR: Scan an invoice containing your country's tax code and see how the magic works!

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

Register payments

You

Anita, I would like to pay all vendor bills at once by the end of the month. Can you take care of it?

Anita • Accountant

Yes, I will register and confirm the payment.

Register payments

Accounting   Vendors ▶ Bills

	Number	Vendor	...	Payment	Status
☑	BILL/...	Mesa Design		Not Paid	Posted
☑	BILL/...	AEKI Inc.		Not Paid	Posted

Register Payment 🖱

Register Payment   ✕

Journal	Bank
Payment Method	Manual

Create Payment 🖱

	Number	Vendor	...	Payment	Status
☐	BILL/...	Mesa Design			Posted
☐	BILL/...	AEKI Inc.			Posted

★

You

Anita, all vendor bills are paid. Can you create the transactions for Mesa Design and Aeki Inc.? I would like to validate the bank reconciliation.

Anita • Accountant

Ok, what should I write next to the label?

You

You can copy the bill reference from the vendor bill.

Anita • Accountant

Got it!

Accounting

Bank ⋮

Connect Bank

New Transaction

New Transaction ✕

Date	*Today's date*	**Amount**	$ 1,035.00
Label	456785	**Journal**	Bank
Partner	Mesa Design		

Save & New

↻ Repeat for the other one.

ⓘ Depending on the taxes and currency of your country, amount and Journal can be different. Add the total of the bill for Amount.

Bank ⋮

Reconcile 2 Items

Today's date **AEKI Inc.** 12345	**747.50 €**	**Validate**	**To Check**

↻ Repeat for the other one.

ⓘ Bank reconciliation is the process of matching your bank transactions with your business records, such as customer invoices, vendor bills, and payments.

★

You

Anita, can you check if all invoices have been paid?

Anita • Accountant

Of course, let me check the Partner Ledger report.

Accounting   **Reporting** ▶ Partner Ledger

	Journal	Account	Ref	Due Date	Matching Number	Debit	Credit	Amount Currency	Balance
▸ AEKI Inc. Open Journal Items						$ 747.50	$ 1,495.00		$ -747.50
▸ Anita Oliver						$ 1,788.06	$ 0.00		$ 1,788.06
▸ Azure Interior						$ 36,512.50	$ 656.77		$ 35,855.73
▸ BE Company CoA						$ 0.00	$ 12,500.00		$ -12,500.00
▸ Deco Addict						$ 106,662.50	$ 0.00		$ 106,662.50
▸ Mesa Design						$ 1,035.00	$ 2,070.00		$ -1,035.00
▸ Joel Willis						$ 17,675.50	$ 0.00		$ 17,675.50
▸ Unknown Partner						$ 502,627.67	$ 502,572.47		$ 55.20
Total						$ 667,048.73	$ 519,294.24		$ 147,754.49

ℹ

The Partner Ledger report displays the balance of your customers and suppliers by giving you an overview of all the debits and credits.

★

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
Record your offices	3
Manage rental status	4
Add a kanban view	5
Automate an activity	6
Improve the list view	7
Create statistic reports	8
Design a report template	9

Install the app

Apps

Studio
Create and customize your Odoo apps

Install

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

🔍 | 🔻 Apps ✖ | 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.

💬 🕐 My Company ✖ 👤

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

Admin ▾

Settings

New App

Create your App

Choose an app name

Office Rental

‹   ›

Design your Icon

Create your first Menu

Choose the name of the menu

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 ›

Design office form

2

You

What information do you need on an office form?

Sophia • Sales Manager

So, 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

+ Add

New Fields

$N°$ **Integer**

Ab   **Text**

▼   **Selection**

Name

Image

Value

Label
Rent

Capacity   0

Address

> If you want to use existing contacts for the address, use a *Many2one* 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".

ⓘ

✏ Edit Menu   + New Model   Close

★

Record your offices

3

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**.

Leased	$ 65000

Chestnut
1450, Chestnut Street
Closed Space • 150 desks

Available	$ 2000

Creekside
645 Creekside Drive
Open Space • 15 desks

Available	$ 3500

Merriman
4597 Merriman Street
Open Space • 45 desks

⠿ **Office Rental** New

Merriman

Rent $3,500.00

Capacity   45

Address   Merriman Street, 4597

Type   Open Space ▾

New   Offices
New ⚙ ☁ ↺

↻ Repeat this operation to create the 2 other offices.

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

★

Manage rental status

Sophia • Sales Manager

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

Could we manage office status :
Available ▶ Leased ▶ To renew?

You

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

Sophia • Sales Manager

Great! Let me know when it's done,
so I can **add the status for each office**.

Manage rental status

4

💬 🕐 My Company 🛠️🤚 👤

| | ✏️ Edit Menu | ➕ New Model | **Close** |

Automations   Access Control   Filter Rules   📇 ⊞ 📈 🔍🤚

Add a pipeline status bar 🤚

Field Properties

☰	Available	✏️	🗑️
☰	Leased	✏️	🗑️
☰	To renew	✏️🤚	🗑️

Confirm

| | ✏️ Edit Menu | ➕ New Model | **Close**🤚 |

| New | Offices 🤚 New ⚙️ |

	Name
☐	Merriman 🤚
☐	Chestnut

| | **Available** 🤚 > Leased > To renew |

⭐

Bonus Point · You'll find the status of each office on the front of card 3.   ⭐ ⭐

Add a kanban view

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

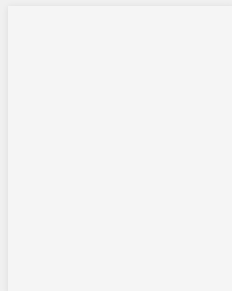::: Office Rental   Offices

Views

Multiple Records Views
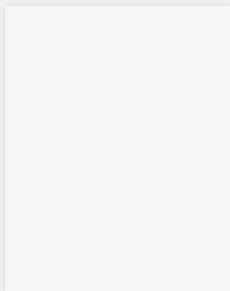
Activate View

Kanban

🖥 **View**

Add tags
Merriman
Add a Priority
Add an avatar

Default Group by

Pipeline status bar ✕ ▼

Close

Automate an activity

You

How do you make sure our clients are happy?

Sophia • Sales Manager

I asked them when I think about it.

You

Let's make this more professional by **adding a new action** on the stage "**Leased**".
So that as soon as the office is in the Leased stage, there will be automatically a new **activity type** "**To Do**" with the **title** "**Check up with the new renter**", planned **1 month** later.
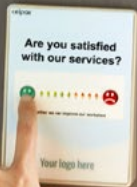
Automate an activity

::: **Office Rental** Offices

Leased ⚙ +

Chesnut

▶

Leased ⚙ +

Chesnut

| Fold |
| Automations |

New Offices
Automation Rules ⚙

Stage is set to "Leased"

Trigger Stage is set to ▼ Leased

Actions To Do

Add a new action

Create Actions

Type	Create Activity		**Due Date In**	1 Months
Activity Type	To Do		**Activity User Type**	Specific User
Title	Check up on new renter			

Save & Close

⭐

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.

Office Rental Offices

Existing Fields ▶	▼ Type	N° Capacity	▼ Status

☐ Name	Type	Capacity	Rent	+
☐ Merriman	Open Space	45	3,500.00	
☐ Chestnut	Closed Space	150	65,000.00	
☐ Creekside	Open Space	15	2,000.00	

Close

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

Create statistic reports

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).**
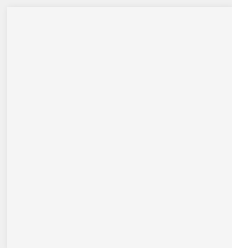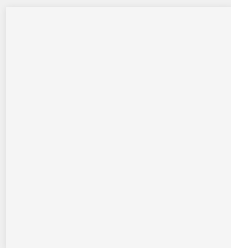

keep it simple.
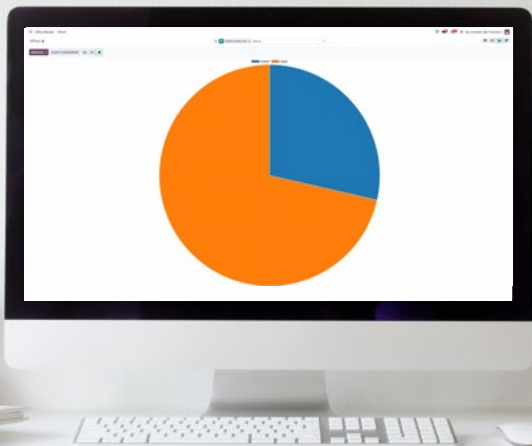
Office Rental   Offices

Views

Reporting Views

ACTIVATE VIEW

Graph

Close

Offices ⚙

Measures ▼   **Insert in Spreadsheet**

✓ **Capacity**
  Rent

🔍 Search...   ▼

◈ Group By ▼

Add Custom Group   ▲
Pipeline status bar

Apply

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

Design a report template

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.

Merriman

Merriman Street 4597

Rent
$ 3500.00

Type
Open Space

Capacity
45

Office Rental   Offices

Views   **Reports**

Create

Blank
No header/footer

Block

| ⊳ Field | → | doc (Offices) > Image |

| ⊳ Field | → | doc (Offices) > Display Name
✎ ▾   Heading1   ✐ ▾   ■
Width 800 px   A ▾   ☐ |

| ⊳ Field | → | doc (Offices) > Address |

| ⊳ Field & Label | → | Rent   Type   Capacity |

| Ab Title Block | → | ## About MyOffice Inc. |

| Ab 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.