

SCALE UP!



The Business Game

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

The screenshot shows a web browser window with the URL <https://www.odoo.com>. A teal button at the top left says "Start Now. It's Free". Below it is a grid of eight app icons:

- CRM (green and blue icon)
- Sales (yellow and orange bar icon) - checked
- Invoicing (blue icon)
- Accounting (purple and yellow icon) - checked
- Project (teal and pink icon)
- Timesheet (yellow and pink icon)
- Inventory (orange and purple icon) - checked
- Purchase (purple and teal icon) - checked



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

[Configure >](#)

Company Name

MyOffice Inc.

edu-myoffice-inc.odoo.com

Country

United States

[Start now >](#)

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

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

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



Buy & Sell

Create a product

1



Marc • Purchase Manager

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

You



How much do they cost?



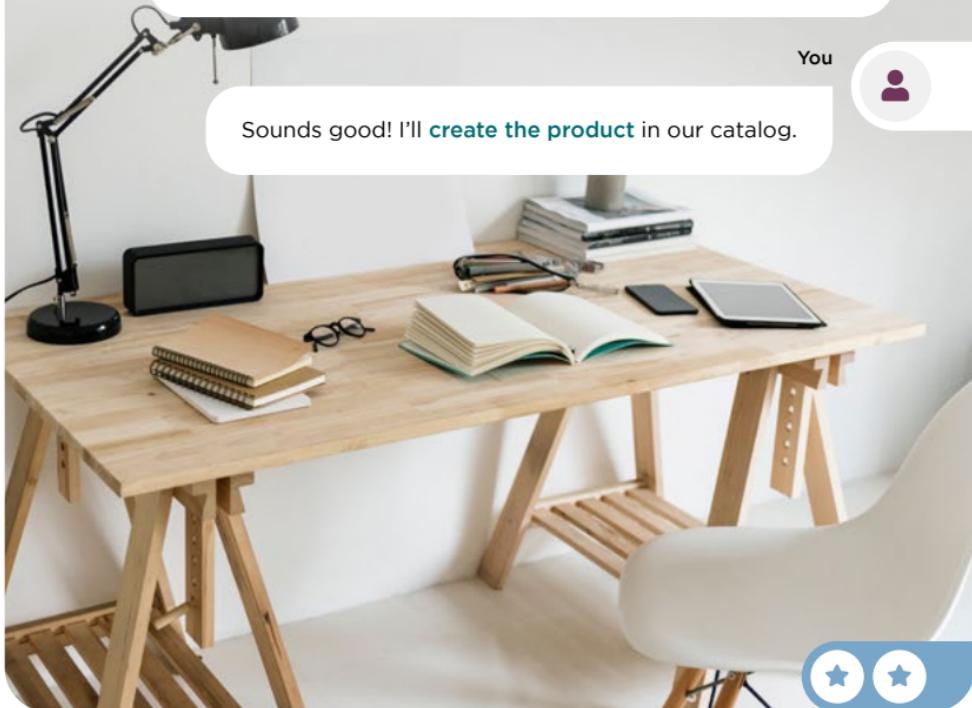
Marc • Purchase Manager

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

1



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 | edit |
|-------------|----------|--------|------|
| 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.



Buy & Sell

Purchase large desks

2

You



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

 Sophia • Sales Manager

Between 9 and 12.

You



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



Purchase large desks

2



Purchase

Orders ▶ Requests for Quotation

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



Buy & Sell

Receive products

3

Incoming Call...



Hello, I'm the driver from Wood Corner.

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

You



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



Receive products

3



Inventory

Receipts

⋮

1 To Process

Reference

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



Buy & Sell

Control the bill

4



Paul • Secretary

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

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



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

MyOffice Inc

1725 Slough Avenue
Scranton PA, 18540
United States

Invoice 2022/0123

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



Buy & Sell

Sell products

5



Brandon • Customer

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

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

You



You'll get it by email right now!



Sell products

5



Sales

Orders ▶ Quotations

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](#)

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



This button takes you directly to the Delivery Order.

Delivery
1

Buy & Sell

Deliver to customer

6



Roger • Inventory Manager

I'm in a meeting this morning.

Can you process and **validate the delivery orders** that are ready to be shipped today?

Make sure that the one from **Azure Interior** is shipped.

You



Okay, I'll check this right away!



Deliver to customer

6



Inventory

Delivery Orders

⋮

1 To Process

Reference

WH/OUT/00001



Contact

Azure Interior, Brandon

Status

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

i

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



Buy & Sell

Invoice customer

7



Anita • Accountant

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

You



I'm on it!



Invoice customer

7



Sales

To Invoice ▶ Orders to Invoice

Number

Customer

Total

Invoice Status

S00001



Azure Interior, Brandon

\$ 759.00

To invoice

Create Invoice

Create Invoice

 Regular invoice

The other options “Down payment” allow you to invoice only a part of the invoice (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



Buy & Sell

Record payment

8

Inbox (1)

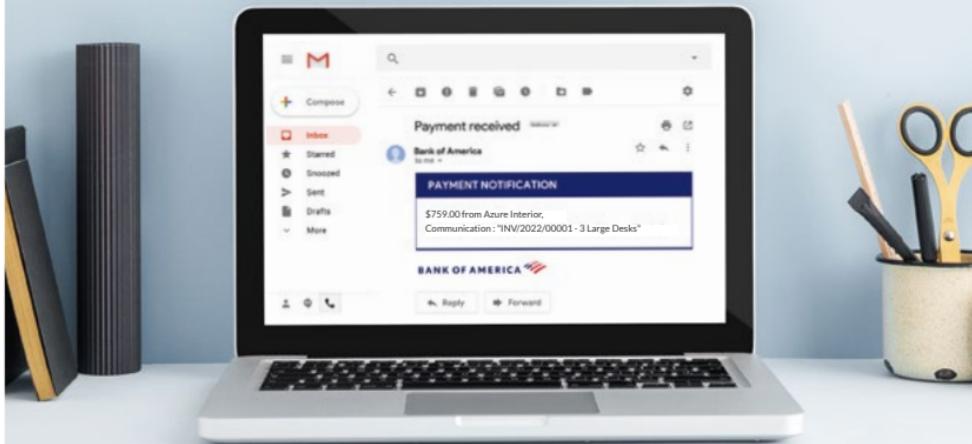


PAYMENT NOTIFICATION
\$759.00 from Azure Interior
Communication: "INV/2022/00001 - 3 large desks"

You



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



Record payment

8



Accounting

Customers ▶ Invoices

| Customer | Total | Payment status | Status |
|-------------------------|-----------|----------------|--------|
| Azure Interior, Brandon | \$ 759.00 | Not paid | Posted |

Register Payment



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.



Buy & Sell

Analyze profits

9

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**.



Analyze profits

9



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 |

i

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



Run a Store

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?



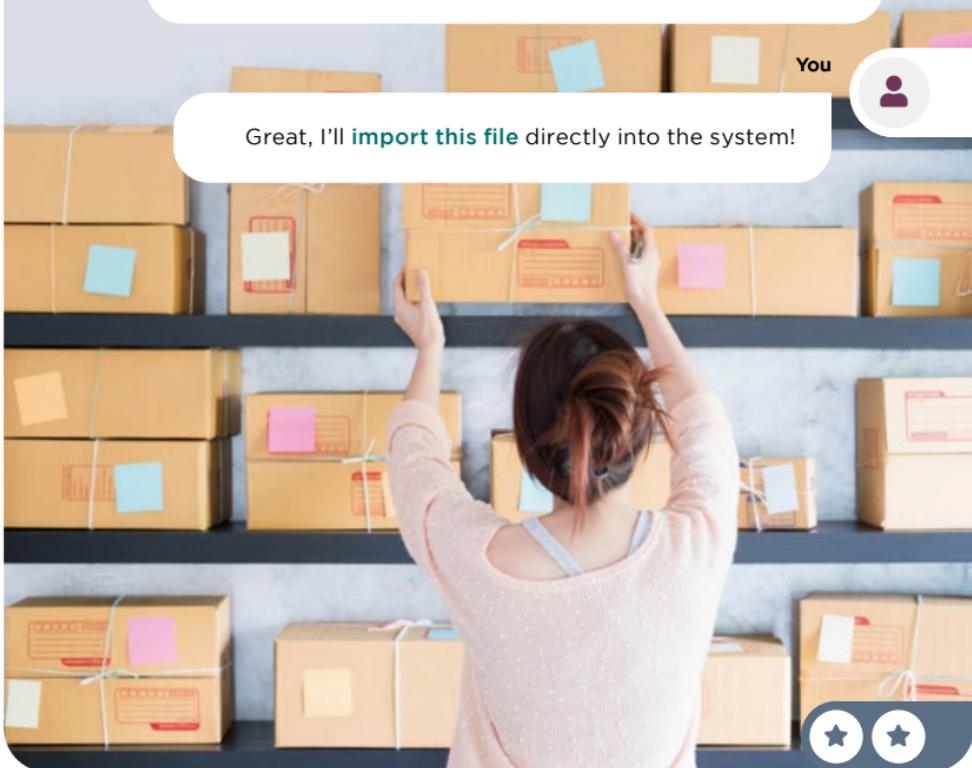
Roger • Inventory Manager

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 <i>product_template_1</i> | ID Externe |
| Name <i>Acoustic Block Screens</i> | Name |

Import



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



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



Desks Miscellaneous



Run a Store

Configure cash control

2

You



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



Anita • Accountant

Sure. I can give you \$550.

You



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



x10

x2

x1

x1

x2

x4



Configure cash control

2



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.



Run a Store

Sell 3 LED lamps

3



Mike • Customer

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

You



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



Mike • Customer

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



Sell 3 LED lamps

3

LED Lamp

\$ 320.00

2.00 Unit(s) at \$ 200.00 / Unit

With a 20% discount

LED Lamp

\$ 200.00

1.00 Unit(s) at \$ 200.00 / Unit



LED Lamp
\$ 200.00

Total: \$ 598.00

Taxes: \$ 78.00



Customer

1

2

3

Qty

4

5

6

Disc



7

8

9

Price

+/-

0

.



Payment



Cash

600.00



Validate



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



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



Run a Store

Cash out money

4



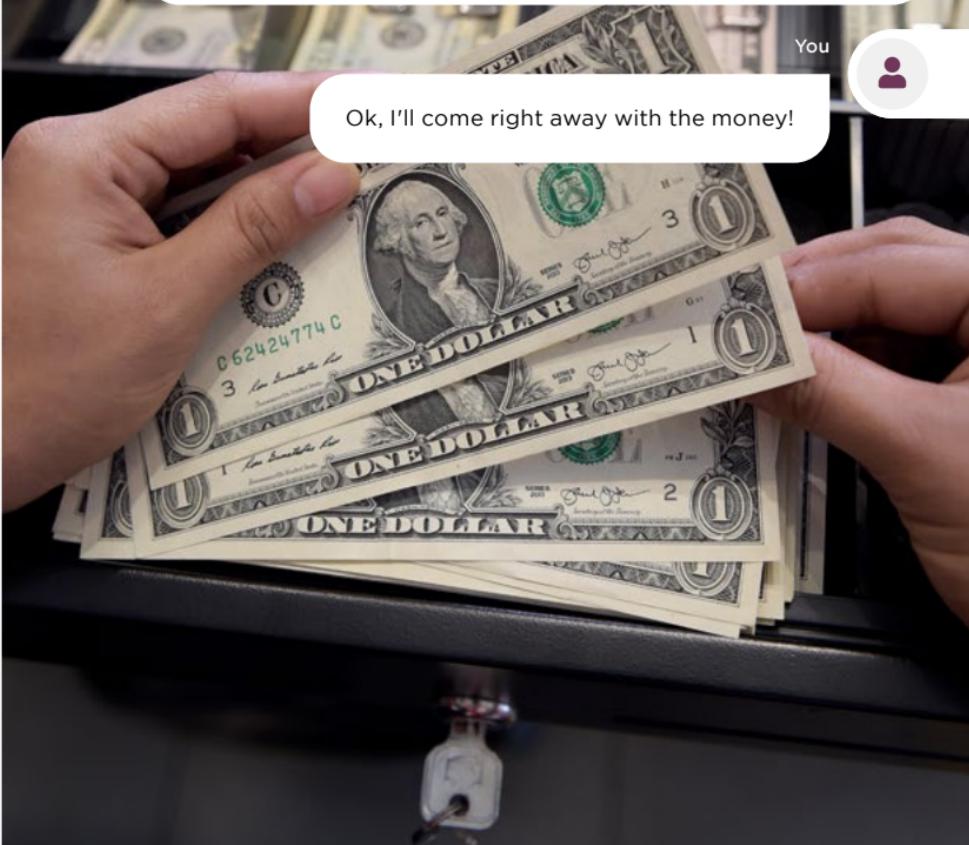
Anita • Accountant

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

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

You

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



Cash out money

4



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



Run a Store

Sell with an invoice

5



Jennie • Customer

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

You



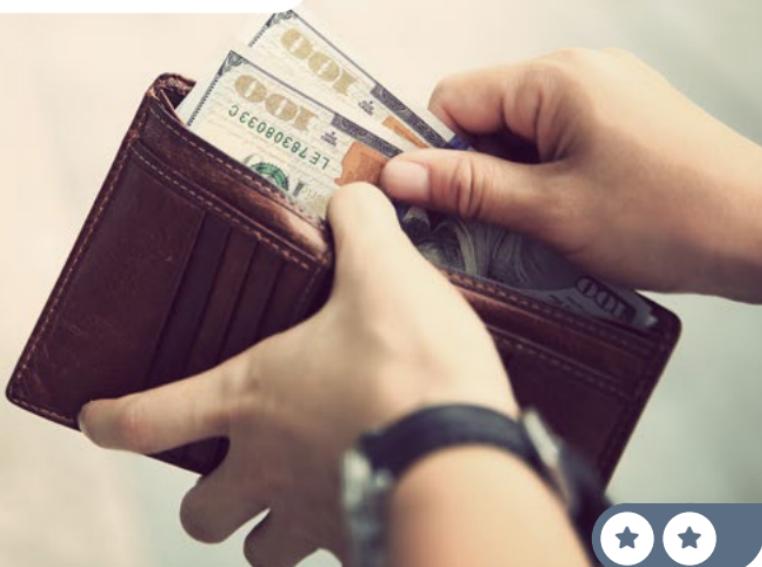
Sure. Can I have your name, address
and phone number, please?



Jennie • Customer

Yes, my name is **Jennie Fletcher, 3000 Hannah Street, New York NY 10001**. 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 |
| 7 | 8 | 9 | Price |
| +/- | 0 | . | ☒ |

>

Payment

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



Click on Invoice to invoice the customer.



You can print the receipt by clicking on

Print the receipt

★

Run a Store

Return 1 LED lamp

6



Mike • Customer

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

You



Sure, no problem!



Return 1 LED lamp

6

New Order

Refund

Receipt Number

Total

Status

Order 00001-001-0002

\$ 115.00

Paid

Order 00001-001-0001

\$ 598.00

Paid

LED Lamp

1,00 Units x \$ 230.00 / Units

\$ 230.00

To Refund: 1.00

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

Run a Store

Control cash

7

You



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

Dave • Showroom Salesman



I'm on it!!



Control cash

7



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.



Run a Store

Analyze the POS sales

8



Anita • Accountant

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

You



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



Analyze the POS sales

8



Point of Sale

Reporting ▶ Sales Details

Sales Details

Start Date ▾
End 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 content

Build my website



Select your favorite theme.



Sell Online

Design your homepage

1

You



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

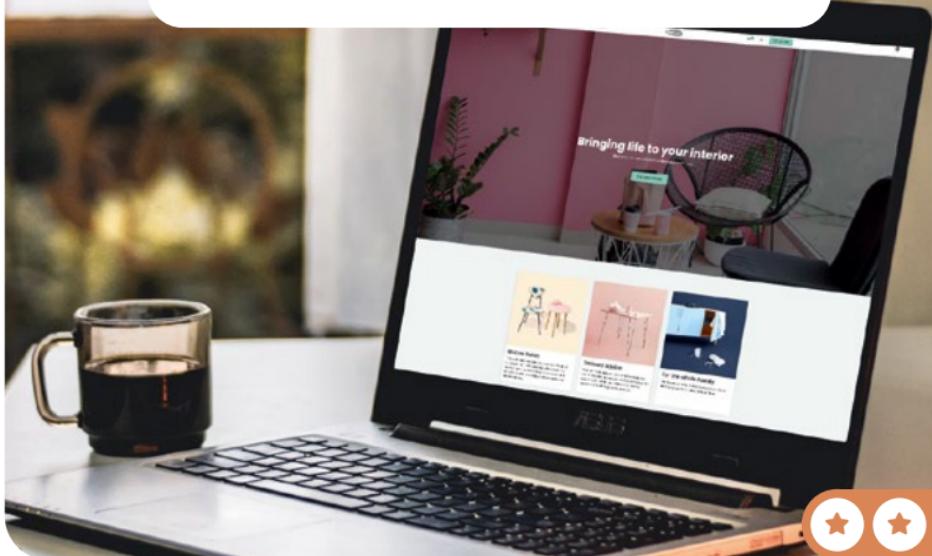


Sophia • Sales Manager

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

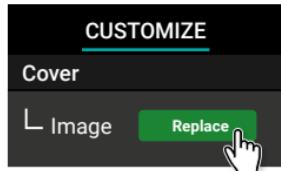
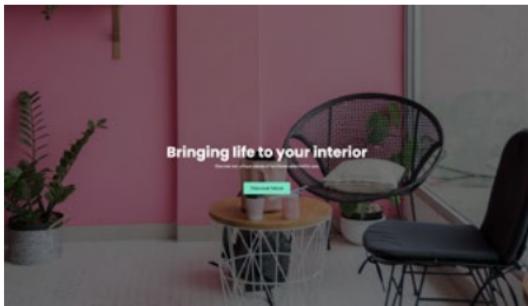
I would put some key numbers like **700+ happy customers**, **35 employees**, **120+ designed products**, and **4-year guarantee**. I would love to see an **animated shape** in the background of this block.

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



Design your homepage

1



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

Search an image



BLOCKS

45 91
≡ ≡

Numbers

Background



BLOCKS

≡ ≡ ≡

Columns

Unique Items
To buy unique pieces is to buy a piece of the earth. It's part put in the execution of the object, its history and the way it was made. It's a unique, personal act, which encourages responsibility and direct economy.

Tailored advice
Whether it's to help you see clearly in a project, to confirm a choice or when you have no ideas about the look you want to give to your home, we're here to accompany you throughout your project.

For the whole Family
Every week our shop receives new products. Some are only on sale for a limited period of time.



Save



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



Published



+ New



Edit



Sell Online

Improve SEO

2



Sophia • Sales Manager

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

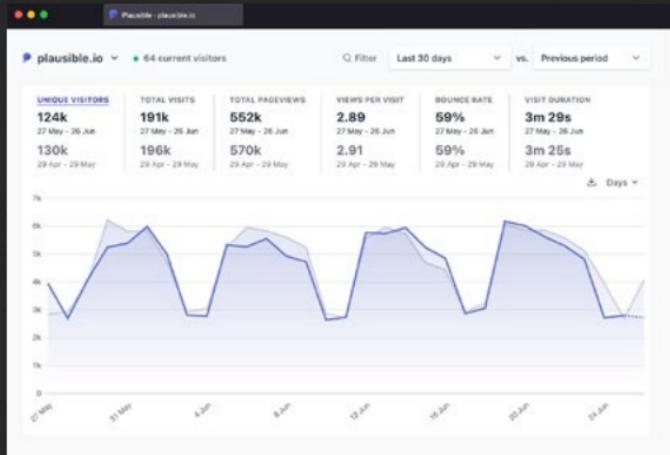
You



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.



Improve SEO

2



Website

Site ▶ Optimize SEO

Title ②

Desk Manufactured on Demand

Description ②

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.

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

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



You can change the home page description based on the Related keywords.



Sell Online

Create a product page

3



Sophia • Sales Manager

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



Sophia • Sales Manager

You



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

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.



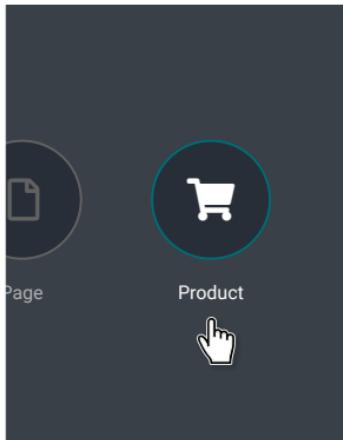
Create a product page

3

Published

+ New

Edit



New Product

X

Product Name:

Sales Price

Customer taxes

Save

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



Sell Online

Set up a product configurator

4



Sophia • Sales Manager

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

You



Ok, I will **activate the variants** feature
and **configure it 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



Sales

Configuration ▶ Settings

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

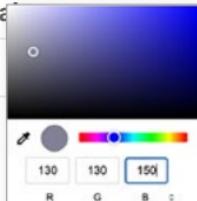
Color

Attribute Value

Value

Grey

Is custom val



Sell Online

Test your ecommerce

5

You



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



Sophia • Sales Manager

Sure!

The image shows a hand holding a tablet displaying an ecommerce website for an office chair. The website has a header with 'Your Company' logo, navigation links (Home, Shop, Events, Forum, Blog, Help), and user account information ('Minchelle Admin'). The main product page features a large image of a black office chair, a price of '\$ 120.00', and a brief description: 'Office chair with extra cushioning to make it comfortable when sitting for long periods. When adding a lumbar support, your position is more ergonomic and will avoid any pain.' Below the product details are color and size selection dropdowns, an 'Add to Cart' button, and social media sharing icons. The bottom of the screen shows a footer with 'Useful Links' (Home, About us, Products, Services, Legal, Contact us) and an 'About us' section with text about the company's mission to improve people's lives through innovative products.



Test your ecommerce

5



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



Review Order > Shipping > Payment



Office Chair

[Remove](#)

- 1 +

\$ 120.00

Subtotal: \$ 120.00

Taxes: \$ 18.00

Total: \$ 138.00

[Checkout >](#)



Review Order > Shipping > Payment



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.).



Sell Online

Cross-sell to customers

6



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

Warranty 3 years



Office Chair

Price: \$ 120.00



General Information

Attributes & variants

Sales

Optional Products

Warranty: 3 years ✕

i

Once the product is set up, test it by adding a chair to your cart. You should see a popup offering you the option 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.



Sell Online

Write a blog post

7



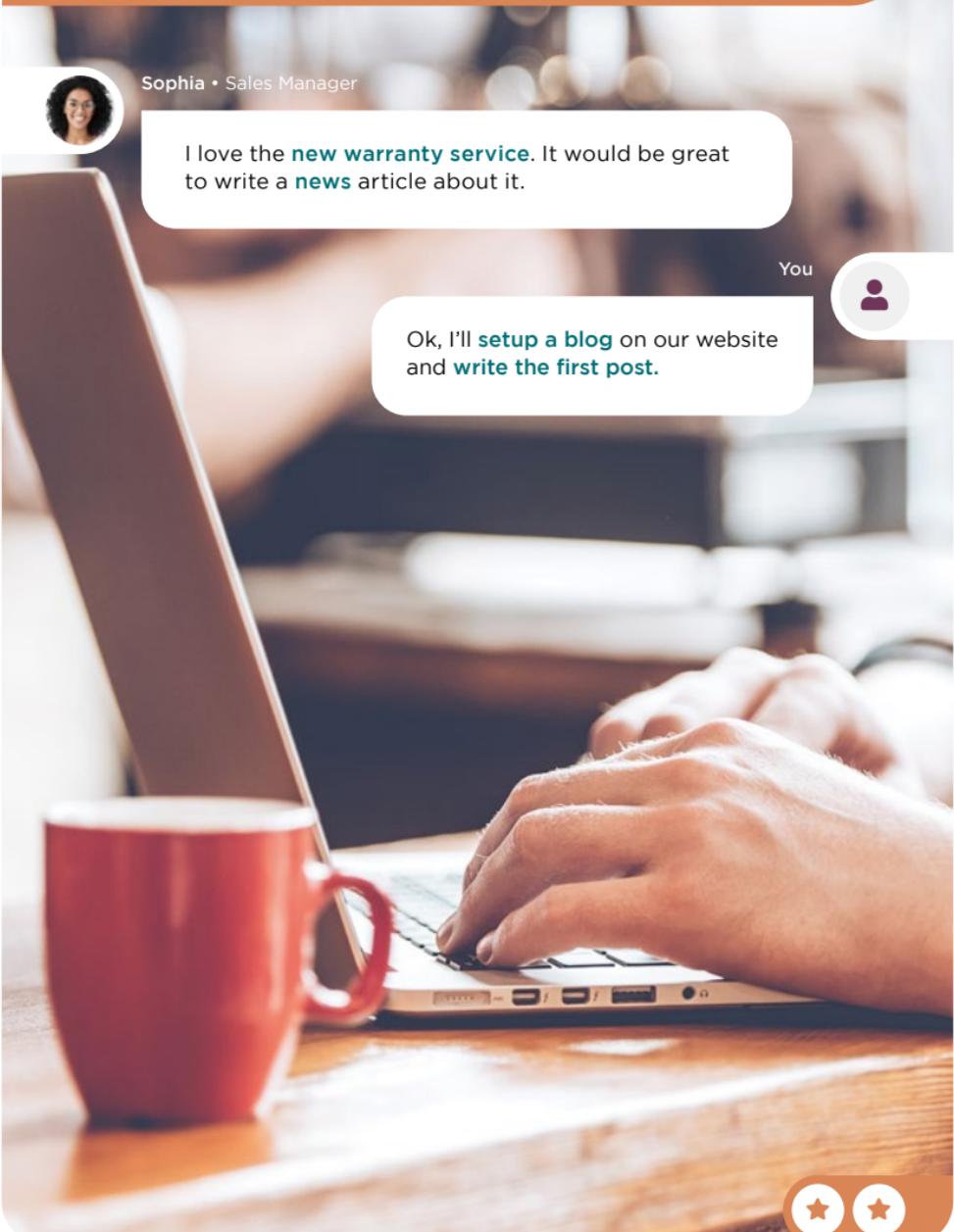
Sophia • Sales Manager

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

You



Ok, I'll **setup a blog** on our website and **write the first post**.



Write a blog post

7



Website

+ New



Page



Product



Blog Post

New Blog Post

X

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

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.

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



Sell Services

Set up a project

1

You



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



Audrey • Interior Designer

It starts with an **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.



Set up a project

1



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

Add



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.



Sell Services

Configure a product

2



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

2



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.



Sell Services

Sell the design service

3



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

3



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
1Tasks
1

Sell Services

Schedule a meeting

4

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**.



Schedule a meeting

4



Project

★ Office Design

✉ design@myoffice-inc.odoo.com

1 Tasks



Onsite Meeting



1

Jackson Group



Schedule activities to help you get things done.

+ Schedule an activity

Click on ● to mark the task as:

● Approved

! Changes requested



Activity Type



Summary

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



Sell Services

Record timesheet

5

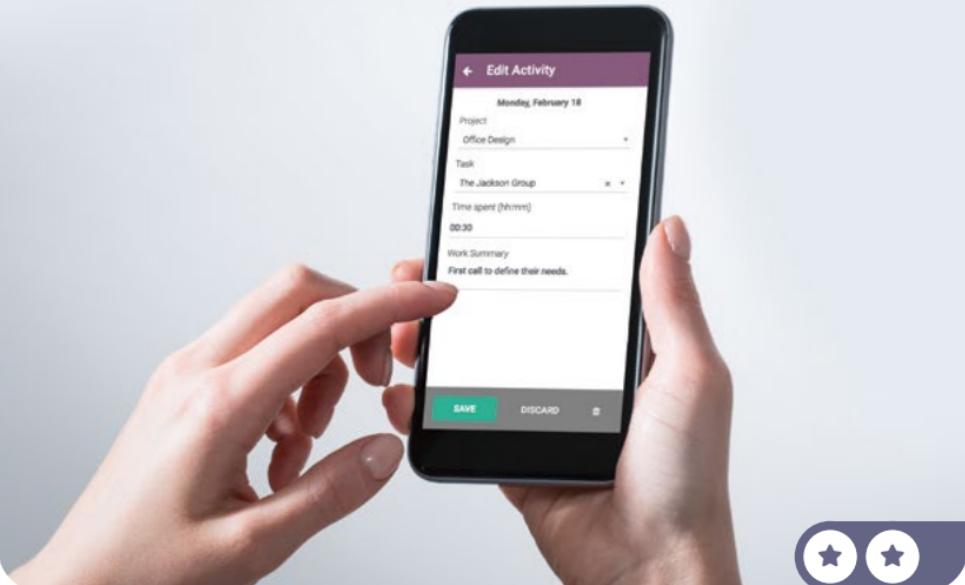
You



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.



Record timesheet

5



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 |

i 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 | | | | |



Sell Services

Plan the work

6



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**.



Plan the work

6



| Description | Timesheets | Sub-tasks |
|------------------|------------|-----------|
| Title | Assignees | More |
| 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.



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.



Sell Services

Timesheet on substasks

7

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**!



Timesheet on subtasks

7

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 Edit

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



18:00



Approved

Cancelled

Done



Sell Services

Invoice customer

8



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.

The screenshot shows a computer monitor displaying the Odoo Sales module. The window title is "Sales - Orders - To Invoice". The main content area is titled "Orders to Invoice" and lists 14 sales orders. Each row includes columns for Order Number, Order Date, Customer, and Total Invoice Status. The status for most orders is "To Invoice", while one order (SO0014) has a status of "Draft".

| Number | Order Date | Customer | Total Invoice Status |
|--------|---------------------|--------------------------|----------------------|
| SO0011 | 10/05/2023 14:08:08 | Wood Corner | \$ 1.15 To Invoice |
| SO0016 | 10/05/2023 14:47:05 | Azure Interior | \$ 1.15 To Invoice |
| SO0019 | 10/05/2023 14:48:08 | Dove Addict | \$ 1.15 To Invoice |
| SO0016 | 10/05/2023 14:50:04 | Your Company, Jean Willy | \$ 795.00 To Invoice |
| SO0014 | 10/05/2023 15:21:09 | Azure Interior | \$ 106.25 Draft |
| SO0018 | 10/05/2023 15:23:00 | Azure Interior | \$ 107.25 To Invoice |
| SO0012 | 10/05/2023 15:33:40 | Gentry Furniture | \$ 30.00 To Invoice |
| SO0011 | 10/05/2023 15:33:25 | Wood Corner | \$ 1.15 To Invoice |
| SO0016 | 10/05/2023 15:12:05 | Wood Corner | \$ 110.00 To Invoice |
| SO0019 | 10/05/2023 15:24:40 | Dove Addict | \$ 175.00 To Invoice |
| SO0018 | 10/05/2023 15:30:40 | Azure Interior | \$ 177.25 To Invoice |



Invoice customer

8



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



Manufacture

Define the bill of materials

1



Ronnie • Head of Engineering

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

You

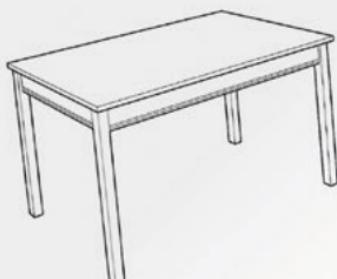


Looks good!

I'll **create the 4 products** in the system (the Table and its components) 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



Manufacturing

Products ▶ Products

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



Manufacture

Purchase raw materials

2

You



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

Only Woods Inc. • Sales Representative



Sure. Here is our offer.

You



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



Purchase raw materials

2



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



Manufacture

Receive products

3



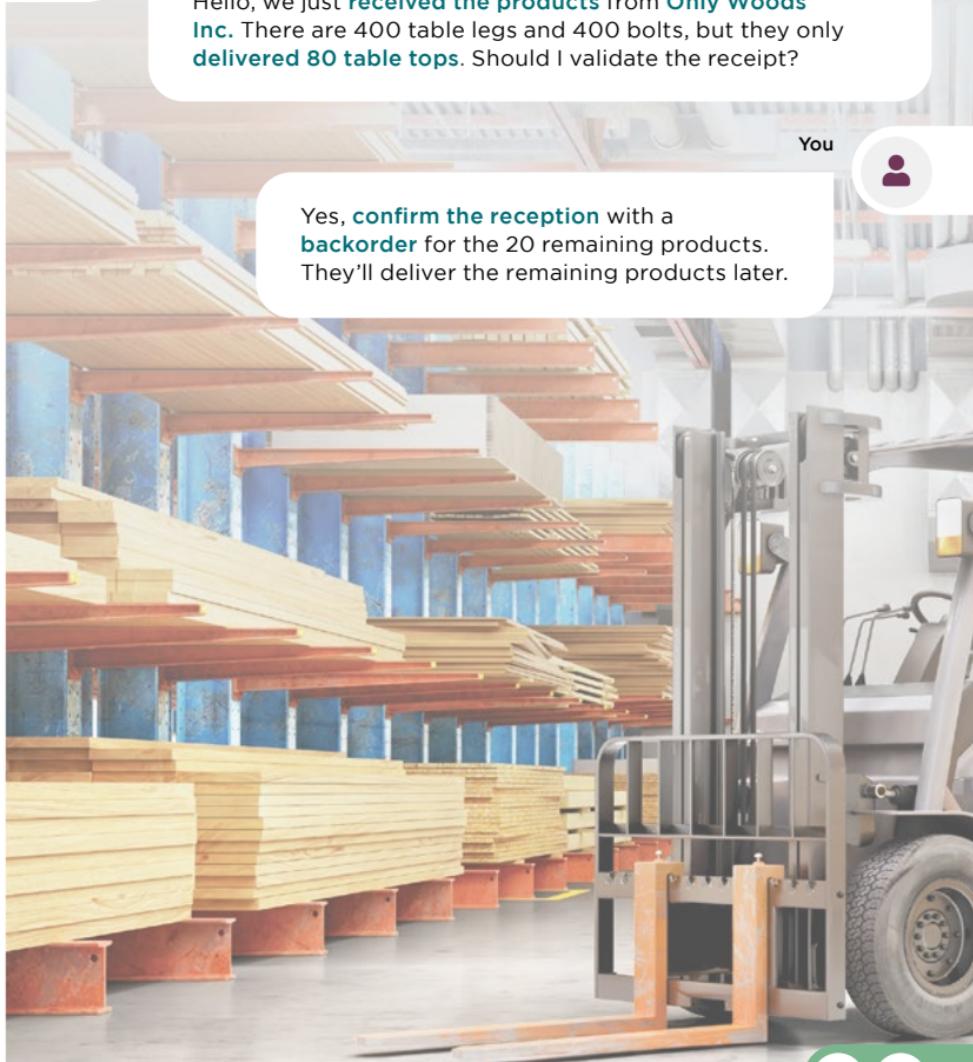
Randall • Inventory Officer

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

You



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



Receive products

3



Inventory

Receipts

⋮

1 To Process



Another way to 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

Manufacture 3 tables

4

You

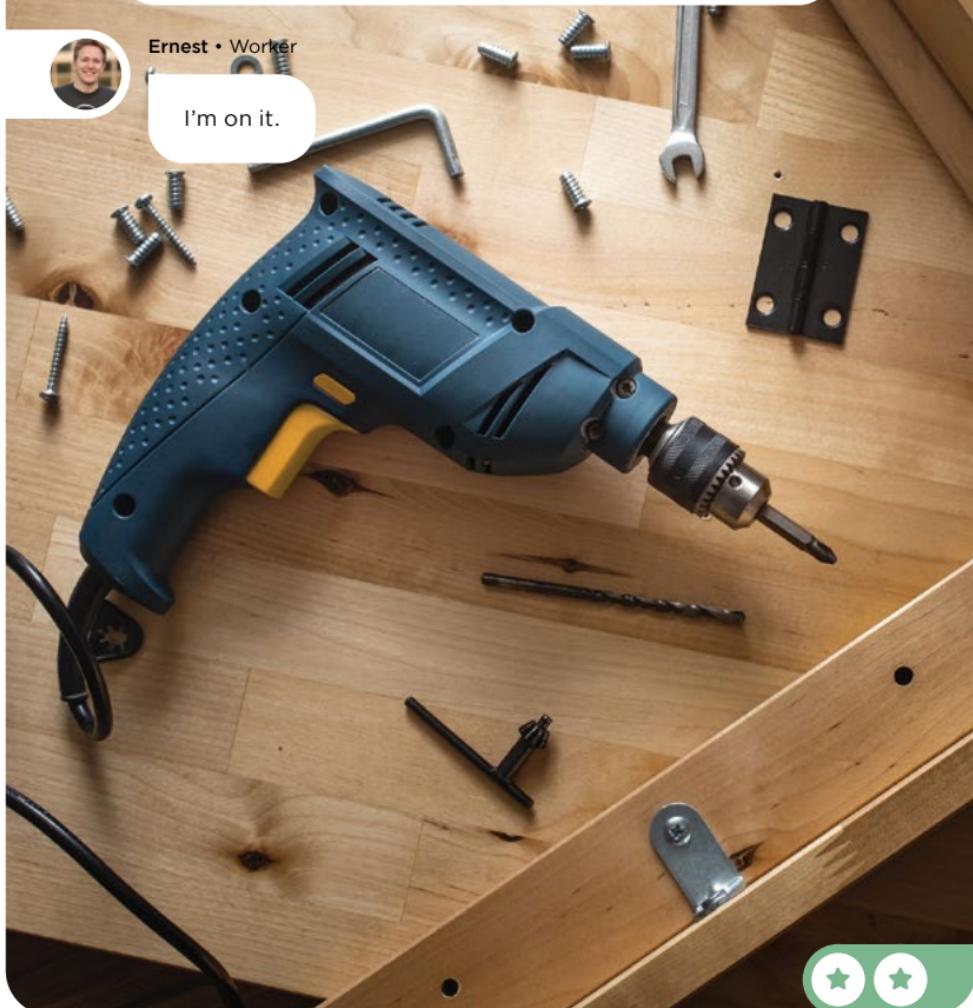


Ernest, we should have all the materials we need to start producing the desks. Can you **launch the production of 3 tables** for the showroom?



Ernest • Worker

I'm on it.



Manufacture 3 tables

4



Manufacturing Operations

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



Manufacture

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?**



Operations & work centers

5



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".



Manufacture

Plan an order

6

You



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

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

Sharlene • Manufacturing Engineer



I'll 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 To Do
Table - 1 Units

Worksheet



Register Production

1 Units

Close Production

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

Worksheet



Register Production

1 Units

Mark as Done



Manufacture

Add a quality check

7



Rachel • After Sales Services

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

You



It's probably related to the bolts. I will **create a Control Point** 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

7

 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.



Manufacture

Check your quality test

8

You



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

 Sharlene • Manufacturing Engineer

That's good. We have to **create a new table**. 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

8



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



Manufacture

Control cost

9



Anita • Accountant

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

You



Ok, I'll check the **BoM overview** for the theoretical costs.



Control cost

9

 Close



Manufacturing

Products ▶ Bills of Materials

- | <input type="checkbox"/> Product | BoM Type |
|----------------------------------|--------------------------|
| <input type="checkbox"/> 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 |

i

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



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



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



WH-RECEIPTS



DESK12345678



O-BTN.validate



WH-STOCK



O-BTN.pack



ZONEA



Use Barcodes

Configure the scanner

1



Paul • Secretary

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

You



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



Paul • Secretary

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



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



Use Barcodes

Set up your product

2

You



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

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

 Sharlene • Manufacturing Engineer

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



Set up your product

2



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.



Use Barcodes

Receive products

3

Incoming Call...



Hello, I'm the driver from Wood Corner.

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

You



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

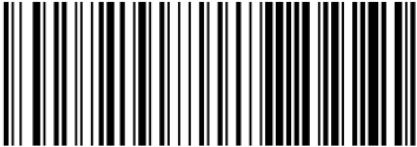


Receive products

3

<  Barcode

- 1 Initiate a receipt.



WH-RECEIPTS



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



Use Barcodes

Sell products

4



Brandon • Customer

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

You



I'll send it to you right now! Your email address is still brandon@game.odoo.com, right?



Brandon • Customer

That's correct!



Sell products

4



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



Use Barcodes

Deliver products

5



Sophia • Sales Manager

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

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

You



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

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



Deliver products

5



Inventory

Configuration ➔ Settings

Operations



Packages

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

Save



Barcode

Operations

Delivery Orders

1 To Process



WH/OUT/00002



Ready

Azure Interior, Brandon

01/15/2022



1



DESK12345678

2



DESK12345678

3



O-BTN.pack

4



DESK12345678

5



O-BTN.pack

6



O-BTN.validate



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



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



Use Barcodes

Adjust inventory

6



Roger • Inventory Manager

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

You



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



Adjust inventory

6



Barcode

Inventory Adjustments

- 1 Scan 3 times



DESK12345678



- 2 Validate the inventory



O-BTN.validate



Use Barcodes

Define locations

7



Roger • Inventory Manager

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

You

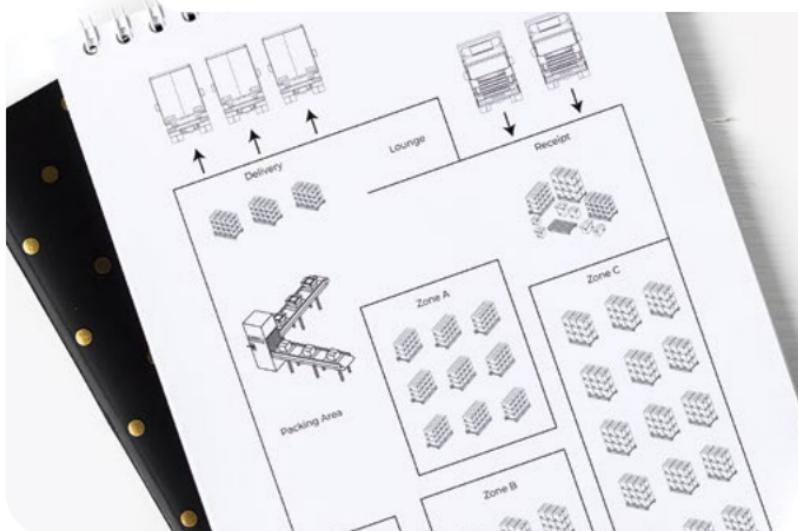


I am going to do an ABC inventory analysis. Frequently sold products should go in ZoneA, closer to the packing zone. Less frequently sold products should go in ZoneC, at the end of the warehouse. Can you **activate the storage location** feature?



Roger • Inventory Manager

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



Define locations

7



Inventory

Configuration ➔ Settings

Warehouse



Storage Locations

Track products location in your warehouse.

Save



Inventory

Configuration ➔ Locations

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 operation 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.



Use Barcodes

Move products

8

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

8



Barcode

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



WH-STOCK

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



DESK12345678

- 3 Next, scan the destination shelf: ZONEA.



ZONEA

- 4 Finally, validate it.



O-BTN.validate



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



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...



Manage your Team

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

1



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



Manage your Team

Refer a friend

2



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

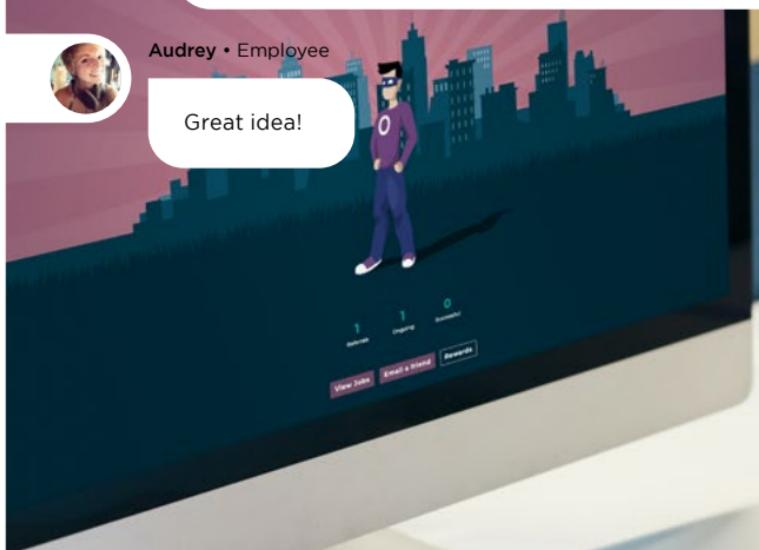


Yes, the job is still available!
Why don't you **refer your friend on the job description of marketing and community officer?**



Audrey • Employee

Great idea!



Refer a friend

2



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

x

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

i

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.



Manage your Team

Make an offer

3



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).



Make an offer

3



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

Your template

Job Position

Community Officer



Job Title

Marketing and Community Officer

Generate

Discard



Manage your Team

Add the employee

4



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



Add the employee

4



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"



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.



Manage your Team

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?



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?



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

You



Evaluate your employee

5



Appraisal

New

Jeffrey Kelly

Manager

Eli Lambert

Appraisal Date

6 month from today's date

Appraisal

Skills

Private Note

Employee's Feedback

Manager's Feedback

Self Assessment will
show here once published.

Manager Assessment will
show here once published.

Confirm

To Confirm

Confirmed

Done

Ask Feedback

Ask Feedback



Survey Template

Recipients

Add employees...

Subject

Send



Manage your Team

Schedule your time off

6



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**.

June

Mo

Tu

We

Th

Fr

Sa

Su

1 2 3 4

5 6 7 8 9 10 11

12 13 14 15 16 17 18

19 20 21 22 23 24 25



Schedule your time off

6



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

i

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



Manage your Team

Submit an expense

7



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**.



Submit an expense

7



Expenses

New

Description

Welcome Lunch for Jeffrey

Category [FOOD] Meals

Total \$102.55

Employee Eli Lambert

Paid By Employee (to reimburse) Company



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

Create Report



Submit to Manager



Approve



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



Close new deals

Import ongoing leads

1



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.

You

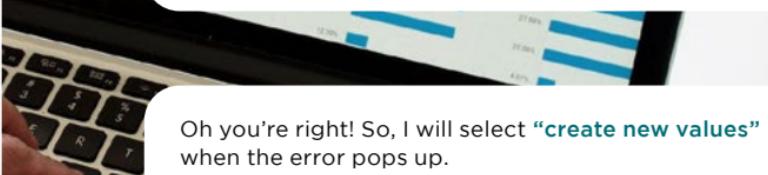


 Sophia • Sales Manager



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.



Import ongoing leads

1



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



Email



Internal notes



Notes



Mike G. was very interested...

Test

Not matching 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



Close new deals

Generate leads

2



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**.



Generate leads

2



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



Close new deals

Create a new opportunity

3



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



Create a new opportunity



CRM

3

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



Close new deals

Send a quotation

4



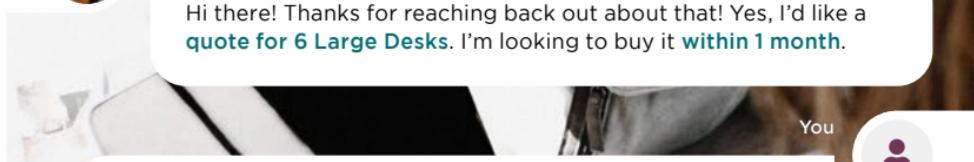
You



Hi Kary! This is the CEO of **MyOffice Inc.** You came by our booth at the Furniture Expo. I wanted to give you a call to see if you are still interested in our tables?



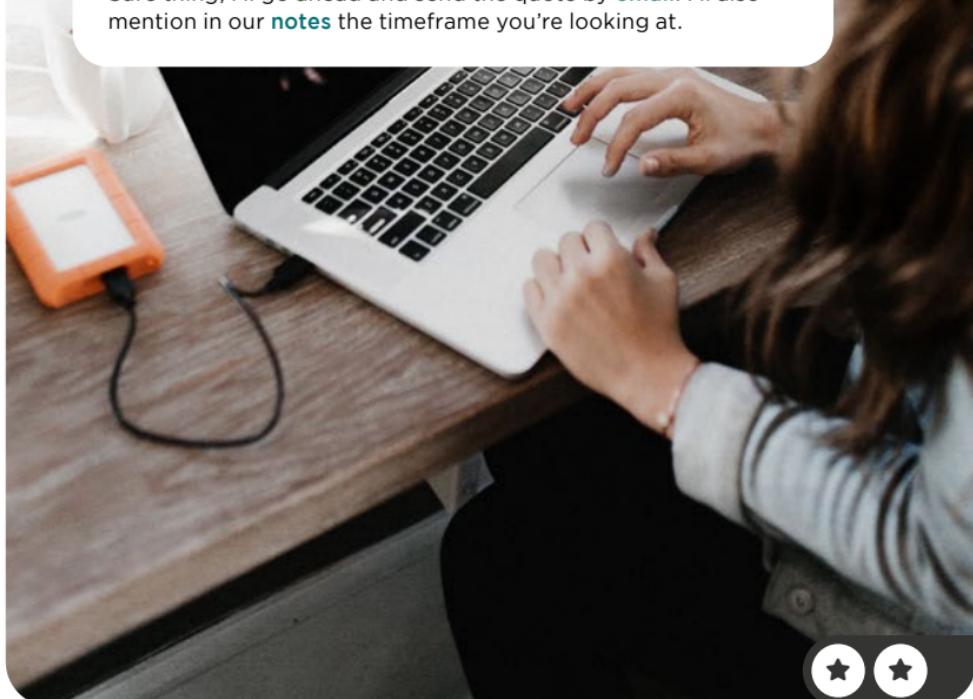
Kary • Prospect



You



Hi there! Thanks for reaching back out about that! Yes, I'd like a quote for **6 Large Desks**. I'm looking to buy it **within 1 month**.



Send a quotation

4



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



Close new deals

Provide a discount

5



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?



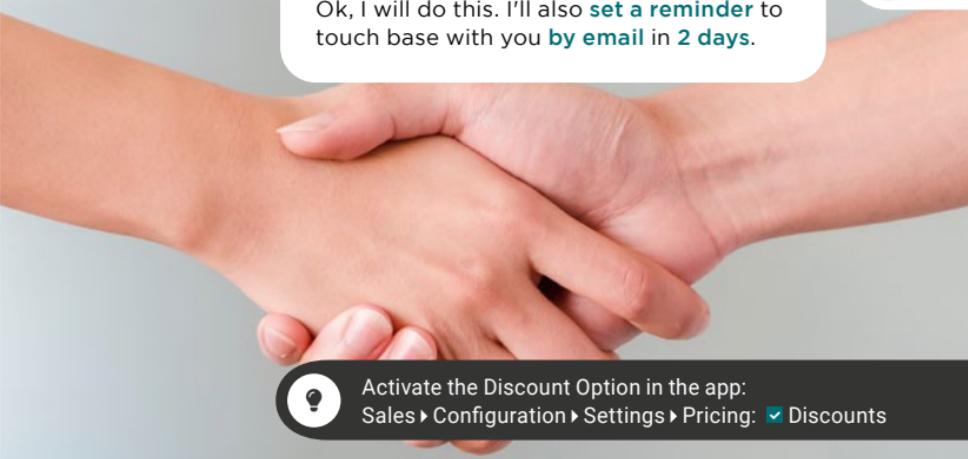
Kary • Prospect

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



Provide a discount

5



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



Close new deals

Organize your CRM

6



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**.



Waiting for Feedback



0

79,100



Kary M.'s opportunity

\$ 1,320.00

Kary M.



Organize your CRM

6



CRM

+ Stage



New

Qualified

Proposition

Won

Waiting

Add

0

0

0

0

Waiting for Feedback

+

Won

1,386

Kary M.'s opportunity

\$ 1,386.00

Kary M.



Close new deals

Close the deal

7

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!



Close the deal

7

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



Close new deals

Analyse expected revenue

8



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.



Analyse expected revenue

8



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



Digitalize Accounting

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.



Create vendors

1



Purchase

Configuration ▶ Settings

Orders



Purchase Agreements

Manage your purchase agreements (call for tenders, blanket orders)



Purchase

Orders ▶ Request for Quotation

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

Vendor

Mesa Design

Copy Products ?



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.



Digitalize Accounting

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 | |
|------------|-------|--------|--|

C

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

| | |
|--------------------------|------------------------------|
| Products | Alternatives |
|--------------------------|------------------------------|

[Compare Product Lines](#)



Digitalize Accounting

Purchase large desks

3

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**.



Purchase large desks

3

| 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.



Digitalize Accounting

Receive products

4



Paul - Secretary

Hi, I know you are in a meeting but the drivers from **Mesa Design** and **AEKI Inc.** have arrived.



You

Ok, send them to dock 3 and 4. I'll be there in 5 minutes to **validate the receipt**.



Validate vendor bills

4



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

C

Repeat for Mesa Design.



Digitalize Accounting

Import vendor bills

5



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!



The screenshot shows an email application interface with the following details:

- Compose** button is visible at the top left.
- Inbox** is selected in the sidebar.
- Messages** listed in the inbox:
 - nick.aic@aicgroup.com
 - AIC Group
 - ChoiTaekyun
 - john(HR), Steve, me
 - Boss, me
 - nick.aic@youmail.com
 - Boss, Steve K.
 - AIC Group
 - Mr.Kosamatsu
 - nick.aic@youmail.com
 - nick.aic@youmail.com
 - Boss, me
 - jennifer.aic@youmail.com
 - AIC Group
- From**, **To**, and **Subject** fields are present in the message preview area.
- Message preview area shows a snippet of an email from "nick.aic@youmail.com" with the subject "RE: [REDACTED]".
- Bottom navigation bar includes icons for reply, forward, and other actions.



Import vendor bills

5

Vendor Bills

- ✎ ✖

inbox@yourdomainname.odoo.com

Subject

Mesa_Design_Vendor_Bill.pdf (47K)

✖

AEKI_Inc_Vendor_Bill.pdf (48K)

✖

Send



Digitalize Accounting

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.



Prepare vendor bills

6



Documents

WORKSPACE ► Finance

AEKI Inc v2.pdf
To Validate

⌚ ⭐ 🚙

Mesa Design V2.pdf
To Validate

⌚ ⭐ 🚙

WORKSPACE Finance

Tags Status > To Validate



Digitalize Accounting

Validate vendor bills

7

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.



Validate vendor bills

7



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.



Digitalize Accounting

Register payments

8

You

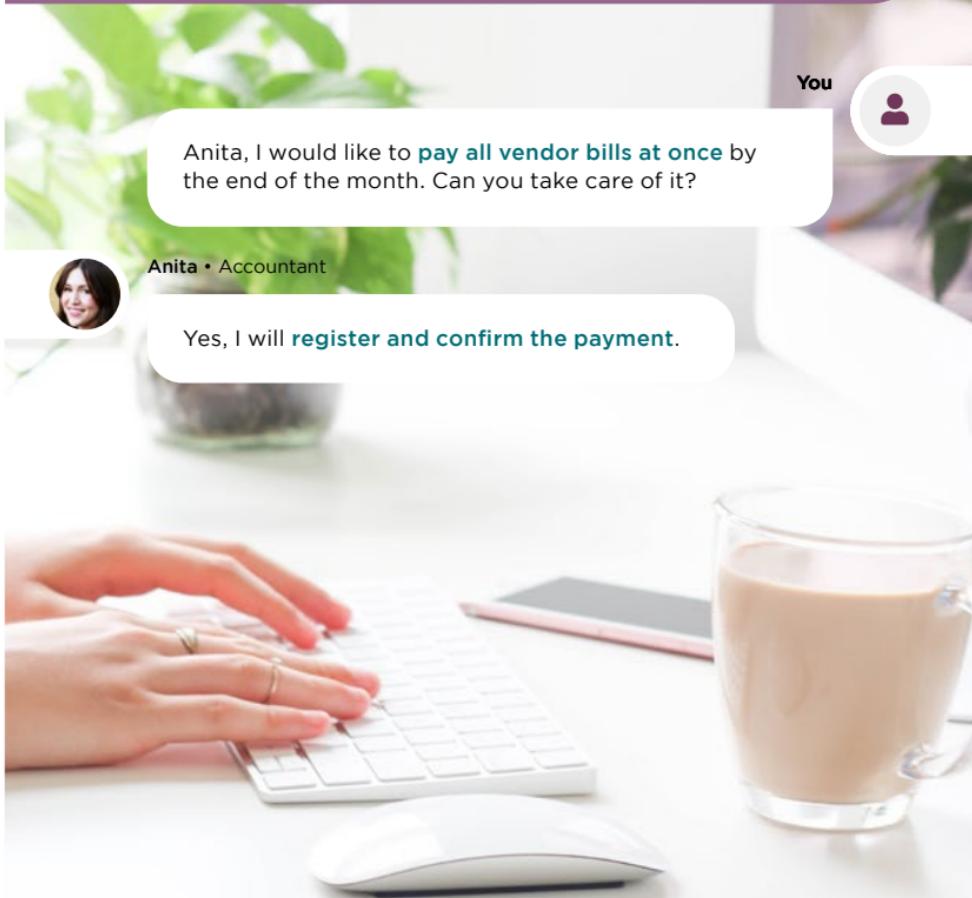


Anita, I would like to **pay all vendor bills at once** by the end of the month. Can you take care of it?



Anita • Accountant

Yes, I will **register and confirm the payment**.



Register payments

8



Accounting

Vendors ▶ Bills

| <input type="checkbox"/> | Number | Vendor | ... | Payment | Status |
|-------------------------------------|----------|-------------|-----|----------|--------|
| <input checked="" type="checkbox"/> | BILL/... | Mesa Design | | Not Paid | Posted |
| <input checked="" type="checkbox"/> | BILL/... | AEKI Inc. | | Not Paid | Posted |

Register Payment



Register Payment

x

Journal Bank
Payment Method Manual

Create Payment



| <input type="checkbox"/> | Number | Vendor | ... | Payment | Status |
|--------------------------|----------|-------------|-----|---------|--------|
| <input type="checkbox"/> | BILL/... | Mesa Design | | | Posted |
| <input type="checkbox"/> | BILL/... | AEKI Inc. | | | Posted |



Digitalize Accounting

Do the bank reconciliation

9

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!



Do the bank reconciliation

9



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.



Digitalize Accounting

Analyze the partner ledger

10

You



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



Anita • Accountant

Of course, let me check the **Partner Ledger report**.



Analyze the partner ledger

10



Accounting

Reporting ▶ Partner Ledger

| Journal | Account | Ref | Due Date | Matching Number | Debit | Credit | Amount Currency | Balance |
|-------------------|---------|-----|----------|-----------------|---------------|---------------|-----------------|---------------|
| » AEXI Inc. Open | | | | | \$ 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 | \$ 2,078.00 | | \$ -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 |



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



Create your App

Initialize your app

1



Sophia • Sales Manager

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

You



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



Sophia • Sales Manager

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



Initialize your app

1



Admin ▾



Settings



New App

Create your App

Choose an app name

Office Rental



Create your first Menu

Choose the name of the menu

Offices

New model

Design your Icon



Suggested features for your new model



Picture

Attach a picture to a record



Monetary value

Set a price or cost on records

Create your app >



Create your App

Design office form

2

You



What information do you need on an office form?

Sophia • Sales Manager

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

VIEWS > FORM

+ 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 *ManyZone* with the relation "Contact", instead of a Text field.

Type

Open Space

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

Edit Menu

+ New Model

Close



Create your App

Record your offices

3

You

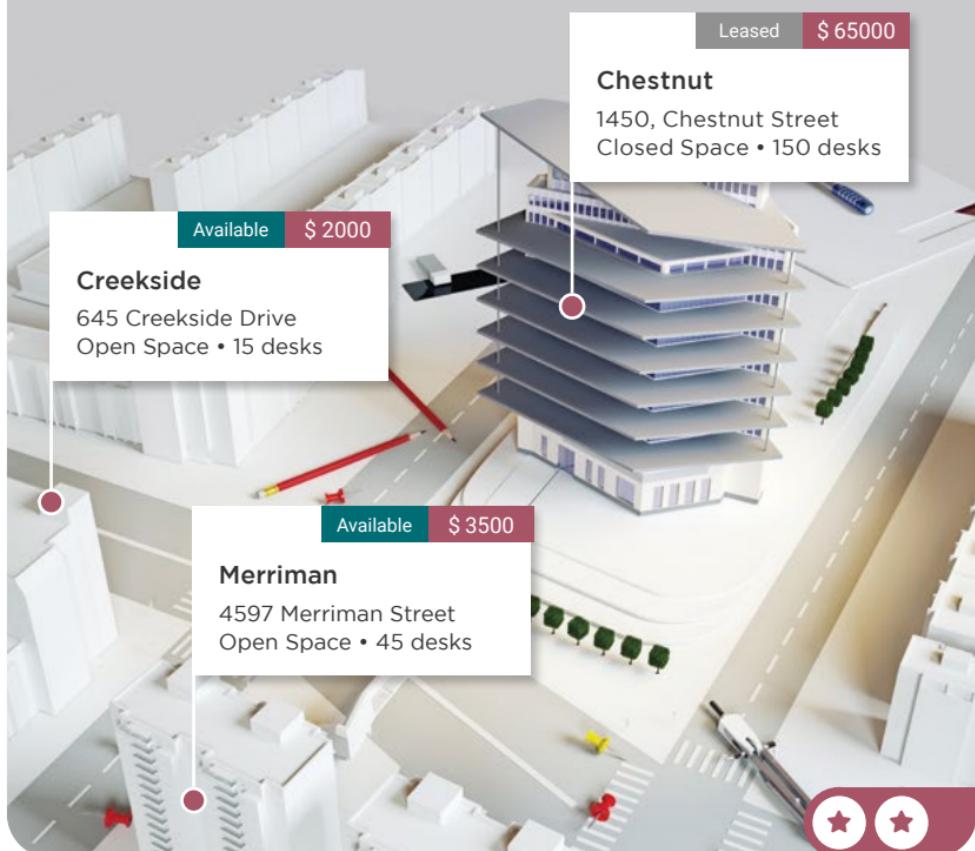


Sophia, I created the Office Rental app. Can you add our properties in the app?



Sophia • Sales Manager

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



Record your offices

3

Office Rental

New

Merriman



Rent \$3,500.00

Capacity 45

Address Merriman Street, 4597

Type Open Space ▾

New

Offices
New



C

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 |



Create your App

Manage rental status

4



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



Name



Merriman



Chesnut

Available



Leased

To renew



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



Create your App

Add a kanban view

5



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

5

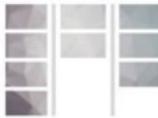
Office Rental Offices



Views

Multiple Records Views

Activate View



Kanban

View

Default Group by

Pipeline status bar X ▾

Add tags

Merriman

Add a Priority

Add an avatar

Close



Create your App

Automate an activity

6

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

6

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



Create your App

Improve the list view

7



Sophia • Sales Manager

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

You



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



Improve the list view

7

Office Rental Offices



Existing Fields ▶



Type

N°

Capacity



Status

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

Close



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



Create your App

Create statistic reports

8

You



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

Sophia • Sales Manager

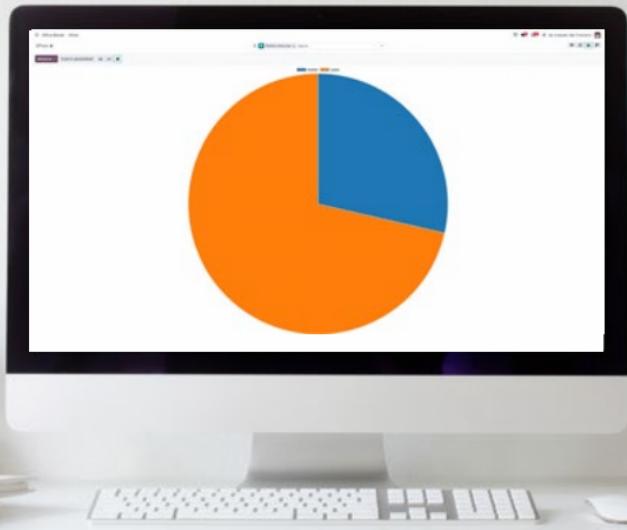


Why don't you [create a graph view?](#)

You



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



keep it simple.



Create statistic reports

8

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".



Create your App

Design a report template

9



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



Design a report template

9

Office Rental Offices



Views

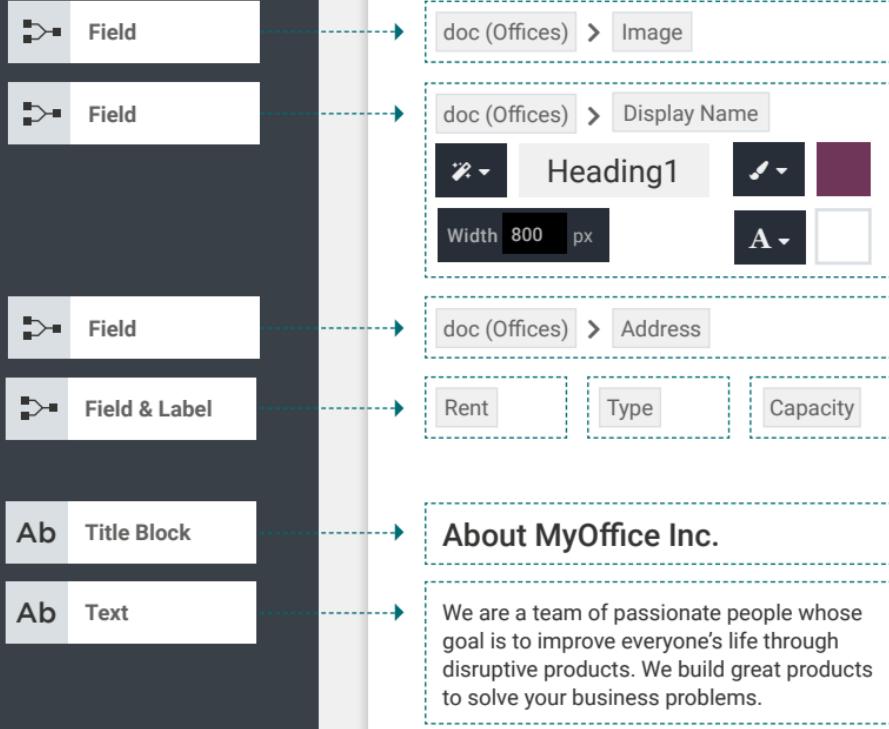
Reports



Create

Blank
No header/footer

Block



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

Print

