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 can choose between 9 other scenarios to develop your strategy:

- Launch a **point of sale** for consumers
- **Sell online** with an eCommerce website
- Offer extra **services**
- **Manufacture** your own products
- Manage your inventory with **barcodes**
- **Recruit** a new employee

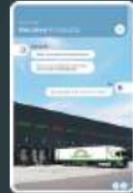**Good luck with your new business!**

Game Rules

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

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

2 Complete the business process online on www.odoo.com. **Take your time**; the goal is to learn!

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

Your Score

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

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

Buy *&* Sell

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

Create your company's database on www.odoo.com through the **"Start now - It's free" button** and **select the apps** required for the following business flow:
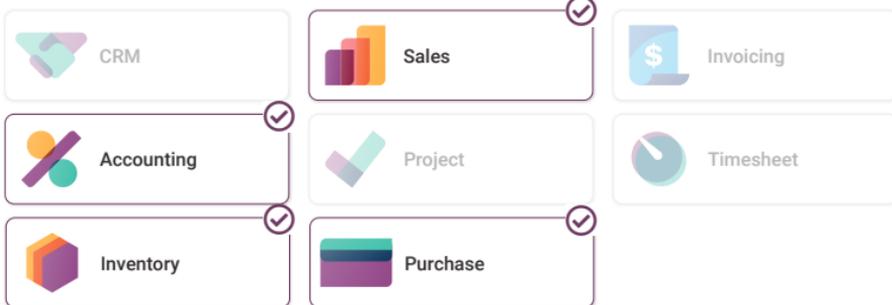
Create a product   1

Purchase large desks   2

Receive products   3

Control the bill   4

Sell products   5

Deliver to customer   6

Invoice customer   7

Record payment   8

Analyze profits   9

Install the apps

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

Start now - It's free

CRM

Sales ✓

Invoicing

Accounting ✓

Project

Timesheet

Inventory ✓

Purchase ✓

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

Continue

Company Name
edu-MyOfficeInc.

edu-myofficeinc.**odoo.com** ✎

Country
United States ▾

ⓘ 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.

Start Now

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

Create a product

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
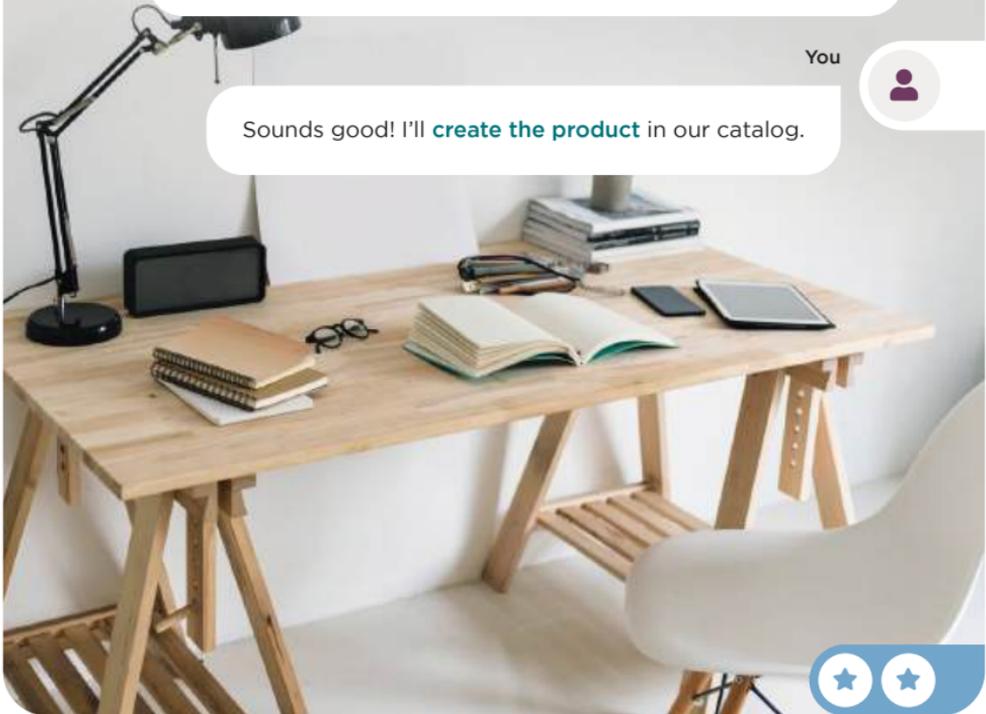
How much do they cost?

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

☆ **Large Desk**

| **General Information** | Sales | Purchase |

Product Type ? ⦿ Goods ◯ Service ◯ Combo   **Sales Price** ? $ 220.00

Invoicing Policy ? Ordered quantities   **Cost** ? $ 140.00

Track Inventory ? ☑

ⓘ Any cost between 100 and 140 is considered acceptable for the game, as the final cost will depend on the quantity you order.

| General Information | Sales | **Purchase** |

	Vendor	Quantity	Unit Price	⇄
⠿	Wood Corner	10.00	100.00	🗑
	Create "Wood Corner" 👆			
⠿	Wood Corner	1.00	140.00	🗑

⭐

You

Sophia, I'm planning 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	Amount	
Large Desk	10.00	100.00	15%	$ 1,000.00	🗑

Add a product

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

Confirm Order ▸	RFQ	RFQ Sent	**Purchase Order**

ℹ This button takes you directly to the Receipt.

🚚 Receipt
1

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

Inventory

Receipts   ⋮

1 To Receive

Reference	Contact	Status
WH/IN/00001	Wood Corner	Ready

WH/IN/00001

Operations	Additional Info	Note

Product	Demand	Quantity
Large Desk	10.00	10.00 🗑

ⓘ If the quantity received is not the same as in "Demand", change it in "Quantity".
Odoo will then ask you whether you want to create a backorder before validating
the order.

Validate ▶   Draft ⟩ Ready ⟩ **Done**

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

Receive

🚚 Receipt
1

Paul • Secretary

Hi! We've received a bill from the vendor **today**.

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 2025/0123

Description	Quantity	Unit Price	Amount
Large Desk	10.00	$ 110.00	$ 1,100.00
		Subtotal	$ 1,100.00
		Tax	$ 165.00
		Total	$ 1,265.00

Please use the following communication for your payment:
INV/2025/0123

Payment terms: **2 months**

Accounting

Vendors ▸ Bills

New

Vendor	Wood Corner ▾	Bill Date	*Today* ▾

Auto-Complete ? | Select a p. o. ▾

P00001: $ 1,000.00

Invoice Lines	Journal Items	Other Info

Label	Quantity	Price	Taxes	Amount
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 ask the vendor for a Credit Note. You get an extra ⭐ if you noticed it (even if you did not send a message to the vendor).

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: *Wood Corner*

Hello, on your invoice 2025/0123, you charged us $110 per unit instead of the $100 we agreed upon. Please send a credit note with the right amount. ☺

Send

Brandon • Customer

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

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

You

You'll get it by email right now!

Brandon • Customer - 1 hour later

Hello, this is Brandon.
I **confirm** the quote and look forward to the delivery!

Sell products

Sales　　Orders ▶ Quotations　　**New**

Customer　　Azure Interior, Brandon　　▼

Order Lines	Optional Products	Other Info

Product	Quantity	Unit Price	Taxes	Amount ⇄
Large Desk	3.00 📈	220.00	15%	$ 660.00 🗑

Send　　▶　　Quotation ▸ **Quotation Sent** ▸ Sales Order

Configure your document layout

Layout	Light	Boxed	Bold	Stripped
Background	Blank			
Text	Lato			
Logo	WOOD CORNER			

Wood Co
1164 Ca
White Ta
United St
accounti

WOOD CORNER

Quotation #S0001

Continue　　Discard

Confirm　　▶　　Quotation ▸ Quotation Sent ▸ **Sales Order**

ⓘ This button takes you directly to the Delivery Order.

🚚 Delivery 1

⭐

Deliver to customer

6

Roger • Inventory Manager

I'm in a meeting this morning.

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

You

Okay, I'll check this right away!

Deliver to customer

Inventory

Delivery Orders ⋮

1 To Deliver

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

Validate ▶ Draft Waiting Ready **Done**

ⓘ Odoo automatically reserves products based on quantities on hand. However, even if there isn't enough stock, you can force the transfer. If you do, the stock might become negative until you fix the issue.

Invoice customer

Anita • Accountant

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

You

I'm on it!

Sales   To Invoice ▶ Orders to Invoice

Number	Customer	Total	Invoice Status
S00001	Azure Interior, Brandon	**$ 759.00**	To invoice

Create Invoice

Create invoice(s)   ⦿ Regular invoice

ⓘ

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

Create Draft

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

Untaxed Amount:	**$ 660.00**
Tax 15%:	$ 99.00
Total:	**$ 759.00**

Confirm   ▶   Draft ⟩ **Posted**
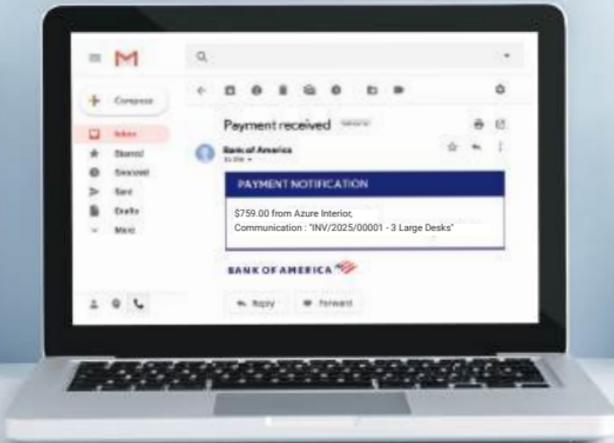
Record payment

Inbox (1)

PAYMENT NOTIFICATION
$759.00 from Azure Interior
Communication: "INV/2025/00001 - 3 large desks"

You

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

Accounting

Customers ▸ Invoices

Customer	Total	Status
Azure Interior, Brandon	$ 759.00	Posted

Pay

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

Journal	Bank ▾
Amount	$ 759.00

ℹ The **Amount** and **Journal** can be different; it depends on the taxes and currency of your country.

Create Payment

Draft ▸ **Posted**

IN PAYMENT

ℹ Instead of recording payments manually, you can synchronize your bank with Odoo (it supports integration with 26,000 banks) or import bank statement files. Reconciliation becomes much faster as matches are suggested automatically.

Analyze profits

You

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

Anita • Accountant

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

Accounting   **Reporting** ▸ Profit and Loss

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

> /profit 🔍

▸ Revenue	660.00
Less Costs of Revenue	0.00
Gross Profit	**660.00**
▸ Less Operating Expenses	1,000.00
Operating Income (or Loss)	**-340.00**
Plus Other Income	0.00
Less Other Expenses	0.00
Net Profit	**-340.00**

ⓘ

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

Congratulations! 🏁

What's next? Choose your strategy:

Run a Store
Start selling in your showroom.

Sell Online
Create an eCommerce website.

Sell Services
Manage projects.

Manufacture
Build your own products.

⭐

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 office lamps	3
Cash out money	4
Sell with an invoice	5
Return 1 office lamp	6
Control cash	7
Analyze the POS sales	8

Install the apps

Apps

Point of Sale
Handle checkouts and payments for shops and restaurants

Install

⋮

Point of Sale   Configuration ▶ Settings

Point of Sale   Dashboard   Orders   Products   Reporting

Save   Discard   Settings   🔍 Search...

General settings	**Point of Sale** ▼ **+ New Shop**
Sales	
Calendar	
Purchase	

Odoo

Point of Sale ?
MyOffice Inc.

☐ **Is a Bar/Restaurant**

Save   Discard

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

Import your products

1

You

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

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

Roger • Inventory Manager

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

You

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

Import your products

Point of Sale   **Products** ▸ Products ▸ ⚙

⬇ Import records
...

Upload Data File

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

Data to import

📄 *V19_EN_POS_Products*
☑ Use first row as header

File Column	Odoo Field
External ID *product_template_1*	📄 External ID ✕ ↕
Name *Acoustic Block Screens*	Ab Name ✕ ↕

Import

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

General Information	Sales	**Point of Sale**	Purchase

To Weigh With Scale ? ☐

Category ?   Desks ▾

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

Chairs   **Desks**   **Misc**

⭐

Configure cash control

You

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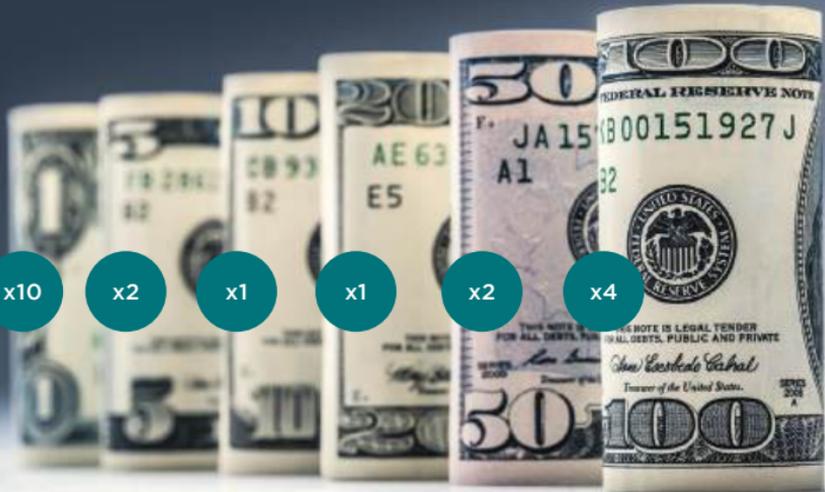
Anita • Accountant

Sure. I can give you $550.

You

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

x10   x2   x1   x1   x2   x4

Point of Sale   Dashboard   ▶   **Open Register**

Opening Control

Opening cash

550   ✖   💵

Opening note

Add an opening note ....

Open Register

ⓘ
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 **Opening note** field allows you to add extra information. These notes will reappear upon closing the Point of Sale session.

Sell 3 office lamps

3

Mike • Customer

I love these **Office 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 **$150**.

2	Office Lamp	$ 73.60
	🏷 *20% discount off on $ 92.00*	
1	Office Lamp	**$ 46.00**

Office Lamp 3

Taxes	$ 15.60
Total	**$ 119.60**

Customer	Note		⋮
1	2	3	Qty
4	5	6	%
7	8	9	Price
+/-	0	.	⌫

Payment

💵	Cash	▶	$119.60	✖	**Validate**

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

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

⭐

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!

≡

Install App
Cash In/Out
Reload Data
Create Product

| **Cash In** | **Cash Out** | **$ 12** |

Reason
Sandwiches Anita

Confirm

ⓘ

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

★

Sell with an invoice

Jennie • Customer

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

You

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

Jennie • Customer

Yes, my name is **Jennie Fletcher, 3000 Hannah Street, New York NY 100001**. My phone number is **(444)-666-9111**.

I'll **pay cash**. Here is $200.
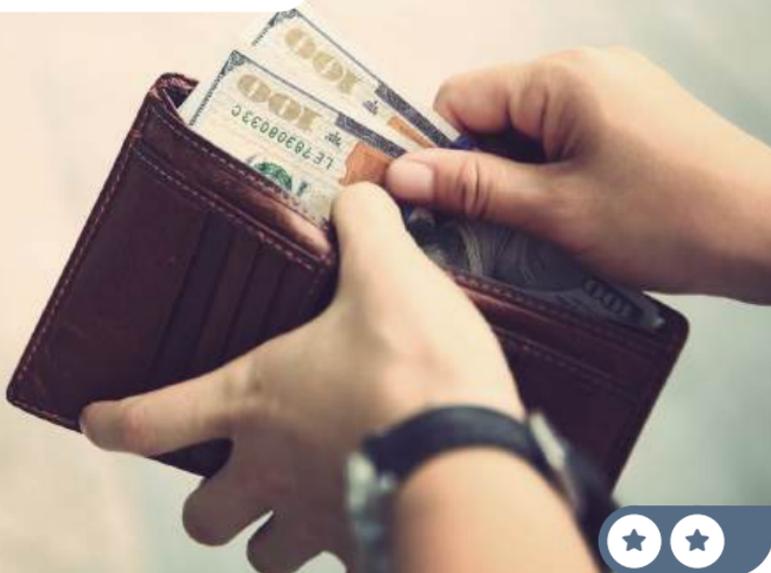
Sell with an invoice

5

Customer	Note		⋮
1	2	3	Qty
4	5	6	%
7	8	9	Price
+/-	0	.	⌫

Payment

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

Whiteboard **1**

Payment

ⓘ Click on **Invoice** to create an invoice. It will be automatically downloaded in PDF format.

👤 Jennie Fletcher		📄 Invoice	☑
1	2	3	+10
4	5	6	+20
7	8	9	+50
+/-	0	.	⌫

Back | **Validate**

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

Mike • Customer

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

You

Sure, no problem!

Return 1 office lamp

6

New Order ▸ ⋮ ▸ ↺ Refund

0002			
2501-001-00002	**$ 115.00**		**Paid**
0001			
2501-001-00001	**$ 119.60**		**Paid**

| 1 Office Lamp **$ 46.00** | ▸ | 1 | ▸ | **Refund** |

| Cash $ -46.00 ✗ | ▸ | **Validate** |

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

-1	Office Lamp	**$ -46.00**
	$ 46.00 / Units	
1	Gift Card	**$ 46.00**
	Sell physical gift card?	

Total: $ 0.00

You

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

Dave • Showroom Salesman

I'm on it!

Control cash

≡

Reload Data
Create Product
Backend
Close Register

Closing Register   **3 orders: $ 188.60**

Cash	**$ 726.60**
Opening	$ 550.00
Payments in Cash	$ 188.60
▸ **Cash In / Out**	**- $ 12.00**
Counted	$ 726.60
Difference	$0.00
Card	**$ 0.00**
Counted	$ 0.00
Difference	$ 0.00

Cash Count

726.60   ✖   [💵] [🗏]

Closing note

Add a closing note…

Close Register   **Discard**

ⓘ

You started this session with **$550**. Then you sold 3 lamps and the whiteboard (**$119.60 + $115**), helped Anita out (**$-12**), and refunded one lamp (**$-46**). You should have a total of **$726.60.**
Figures might change depending on the taxes in your country.

Anita • Accountant

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

You

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

Analyze the POS sales

Backend

Reporting ▶ Sales Details

Sales Details

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

Print

Daily Sales Report Z

My Company

Session ID: My Office Inc./00001

United States

	As of 06/12/2025

06/12/2025 10:40:50 - 06/12/2025 10:57:55

Sales

Desks	**4.0**	**$204.00**
[FURN_0003] Office Lamp	2.0	$64.00 Disc: 20.0%
[FURN_0003] Office Lamp	1.0	$40.00
[FURN_0009] Whiteboard	1.0	$100.00
Total	**4.0**	**$204.00**

Taxes on sales

15%	$30.60	$204.00
Total	**$30.60**	**$204.00**

Refunds

Desks	**1.0**	**$-40.00**
[FURN_0003] Office Lamp	1.0	$-40.00
Total	**1.0**	**$-40.00**

Taxes on refunds

15%	$-6.00	$-40.00
Total	**$-6.00**	**$-40.00**

Payments

Cash My Office Inc./00001	$188.60

Discounts

Number of discounts: 1
Amount of discounts: $ 18.40

Invoices

Sell *Online*

Locally, MyOffice Inc. is recognized for its quality and service. Now, it's time to go global and establish an online 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
Create a product page	2
Improve SEO	3
Add product variants	4
Test your eCommerce	5
Cross-sell to customers	6
Write a blog post	7

Install the apps

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 online catalog and favorite product page.

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.
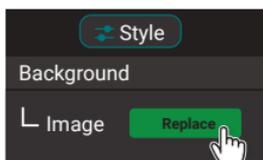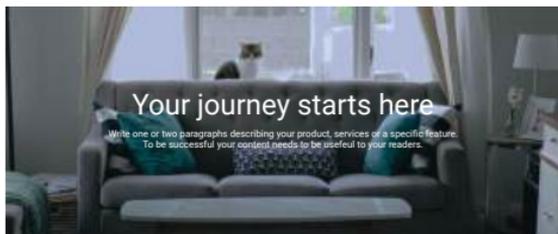
I would add some content with key numbers like **700+ happy customers, 120+ designed products**, and **15 countries delivered to**. I would love to see a **gradient** in the background of this block.

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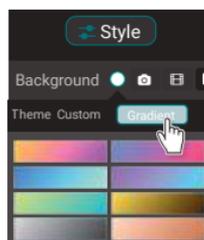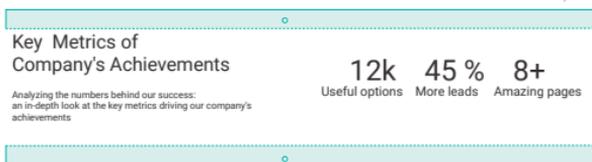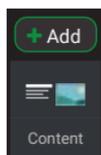
Design your homepage

1

Your journey starts here

Write one or two paragraphs describing your product, services or a specific feature.
To be successful your content needs to be useful to your readers.

New **Edit**

⇄ Style

Background
└ Image   **Replace**
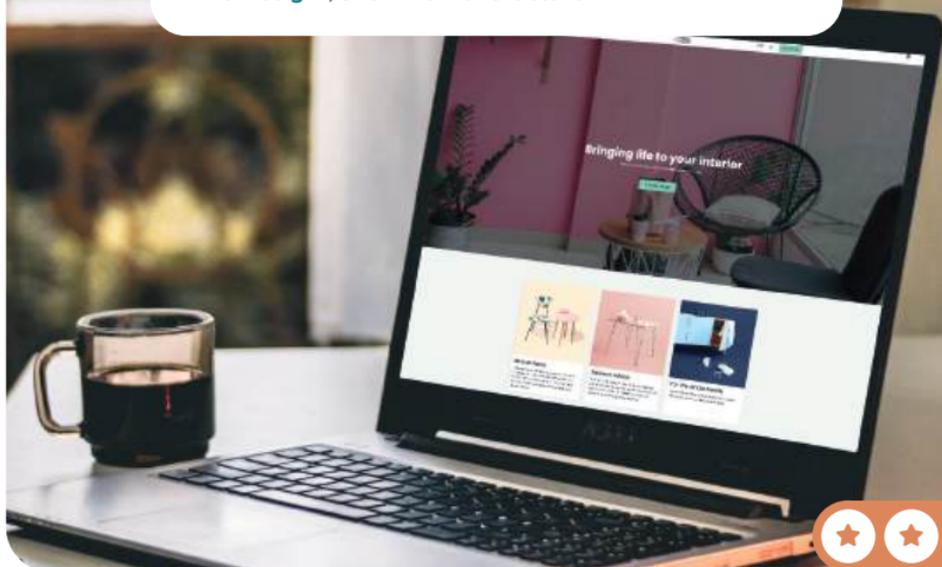
ⓘ When searching for an image, Odoo suggests illustrations and pictures free of charge.

Search an image   🔍

+ Add

Content

Key Metrics of
Company's Achievements

Analyzing the numbers behind our success:
an in-depth look at the key metrics driving our company's
achievements

12k   **45 %**   **8+**
Useful options   More leads   Amazing pages

⇄ Style

Background ● 📷 🎞 ◧
Theme Custom **Gradient**

You Customize
Adapt these three columns to fit
your design need. To duplicate,
delete or move columns, select
the column and use the top icons
to perform your action.

Feature Two
To add a column, reduce the size
of these three columns using the
right icon of each block. Then,
duplicate one of the columns to
create a new one as copy.

Feature Three
Delete the above image or
replace it with a picture that
illustrates your message. Click
on the picture to change its
rounded corner style.

+ Add

Columns

Save

ⓘ If the slider is on "Published", your page is online. You can test it, even from
your smartphone.

Published 🟢 📱   New   **Edit**

⭐

Sophia • Sales Manager

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

You

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

Sophia • Sales Manager

Perfect, and don't forget to **add a description** on the chair. **Ask AI** to help you write a text.
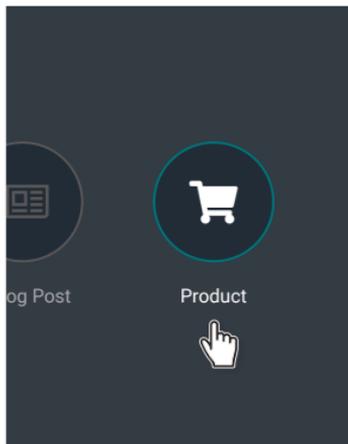
Website

Published ⬤ 📱 | New | Edit

---

og Post | Product

New Product ✕

Product Name:	Office Chair
Sales Price	$ 120.00
Sales taxes	15%

Save

All Products / Office Chair

Normal 16 **B** *I* U S % AI ⋮

Office chair with extra cushions 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 Media	Add	Remove all

Improve SEO

3

Sophia • Sales Manager

I can't find our website on Google when I search for "office furniture". Can we improve the Search Engine Optimization (SEO) of our homepage?
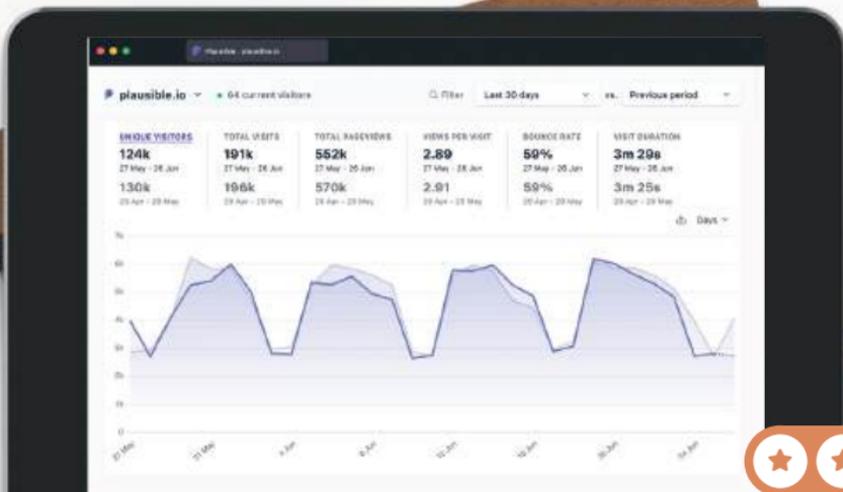
You

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

This tool will help us understand what needs to be changed on our website in order to improve the SEO.

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

Website Go back to the homepage of your website, then:

Site ▸ Optimize SEO

Title ❓

Office Furniture Available on Demand

Description ❓

Upgrade your workspace with durable, stylish, and functional office furniture. Our solutions are built to boost comfort and productivity.

Preview ❓

https://myofficeinc.odoo.com/

Office Furniture Available on Demand
Upgrade your workspace with durable, stylish, and functional office furniture. Our solutions are built to boost comfort and productivity.

Keywords

office furniture

Add   **Generate keywords**

Keywords	H1	H2	T	D	C	Content ideas based on Google searches
office furniture			✔	✔		near me, liquidators, warehouse, stores, center, resources

ⓘ A lot of **"office furniture"** searches on Google are related to "stores" and "center" searches. By adding these keywords, you should attract more visitors.

Office Furniture Store
Your one-stop center for stylish and functional workspaces

ⓘ You can change the homepage description based on the **Content ideas**.

Add product variants

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

We have 2 materials: **fabric** and **leather**. And the chairs come in
3 colors: **Grey (R130, G130, B150)**, **White (R255, G255, B255)**,
and **Purple (R113, G75, B103).**

Website   Configuration ▶ Settings

Shop - Products

☑   **Product Variants**
One product might have different attributes (size, color, ...)

[Save]

Website   eCommerce ▶ Products ▶   ☆ **Office Chair**
Price: $ 120.00

☆ **Office Chair**

| General Information | Attributes & Variants | Sales |

Attribute	Values
material	Fabric Leather
color	Grey White purple...
	Create "purple"

| color ▼ ➔ | Grey White Purple |

Attribute Name   color

Display Type ?   ⦿ Color

| Attribute Values |

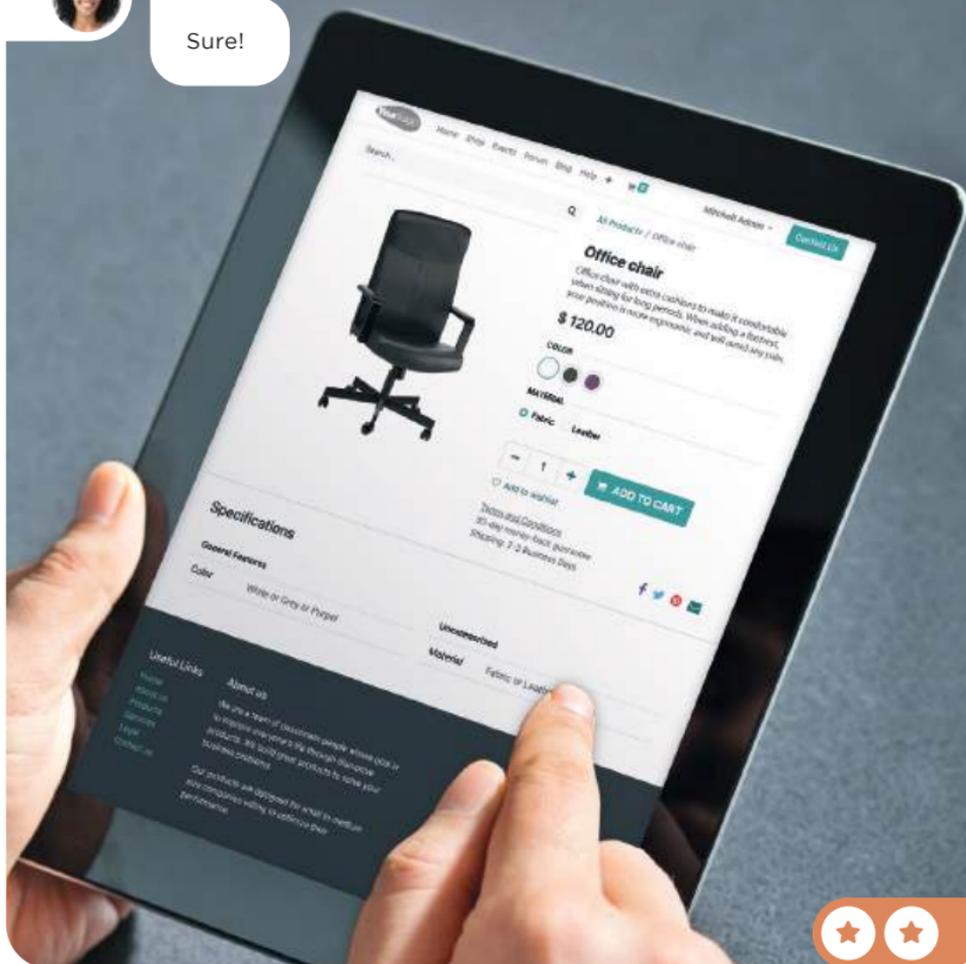| Value	Color	
Grey	●	🗑

130 130 150

Test your eCommerce

5

You

Our eCommerce is ready. Can you **test it by buying the purple chair** online?

Sophia • Sales Manager

Sure!

Go to Website

Office Chair

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

$ 120.00

COLOR

MATERIAL

● Fabric   ○ Leather

− 1 +   🛒 Add to cart

🛒 1

Order ❯ Address ❯ Payment

Office Chair
Remove

$ 120.00

− 1 +

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

Checkout ❯

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

⭐

Sophia • Sales Manager

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

You

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

Website **eCommerce** ▸ Products **New**

Product
☆ **Warranty : 3 years**

☑ Sales ☐ Purchase

General Information | Attributes & Variants | Sales

Product Type ? ○ Goods ● Service ○ Combo **Sales Price** ? $50

New Products
Warranty 3 years

☆ **Office Chair**
6 variants
Price: $ 120.00

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

Optional Products ? [Warranty: 3 years ✕] ▾

ⓘ Once the product is set up, test it by adding a chair to your cart. You should see a popup offering you the option to add a warranty.
You can use this cross-selling strategy by suggesting accessories and optional products. You can also use upselling to suggest an alternative to the selected item, by adding an Alternative Product.

Sophia • Sales Manager

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

You

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

Write a blog post

Website — New

| Page | Blog Post | Product |

New Blog Post ✕

| Select Blog | News ▼ |
| Title | Discover our 3-year warranty |

Save

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

Home Shop News Contact us   YourLogo   🛒⁰ 👤▾ Contact us

Discover our 3-year warranty

All Blogs / News / Discover our 3-year warranty

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

Sell *Services*

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

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

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

Install the apps

Apps

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

| | Apps ✖ | Search... | ▼ |

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

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

Set up a project

1

You

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

Audrey • Interior Designer

I start with a first **interview** to identify the customer's needs. Then, I schedule an **on-site visit** to examine their premises and take necessary measurements.
Based on this, I draw up a **floor plan**. Finally, we proceed with the execution of 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 to provide customers with a direct contact point.

✔️ Project

New

Create a Project ✖

Name
Office Design

☑ **Timesheets**
Log time on tasks

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

Customer Select who to bill...

Create tasks by sending an email to design@myofficeinc.odoo.com

Create project

ⓘ You can configure an email address for your project. A task will be created automatically in this project whenever an email is sent to this address.

Interview ⚙ ＋	On-site Visit ＋	Floor plan ＋	Work ✔ ✖
0	0	0	

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

⭐

Configure a product

Sophia • Sales Manager

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

You

Yes, I checked our competitors and our expenses and I have settled on a price of **$50 per hour.**

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

Sales   **Products** ▸ Products   **New**

Product
☆ **Office Design Service**

☑ Sales   ☐ Purchase

General Information	Attributes & Variants	Sales

Product Type ? ○ Goods ● Service ○ Combo   **Sales Price** ? $ 50.00

ⓘ 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.

Create on Order   Task   ▼

Project   Office Design   ▼

Invoicing Policy   Based on Timesheets   ▼

★ **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 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! **Check if the task has been created** automatically. Assign it to Audrey (audrey@game.odoo.com).

Sell the design service

3

Sales   **Orders** ▶ Quotations   **New**

New

Customer   The Jackson Group   ▼

Create "The Jackson Group"

Order Lines	Optional Products	Other Info

Product	Quantity	Unit Price	Taxes	Amount
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 smart buttons on the top of the screen.

🧩 Projects **1**	🕐 Recorded **0 Hours**	

S00002 - Office Design Service

Project	Office Design
Assignees	Audrey
Tags	Create and edit.

⭐

You

You should have a new task for "The Jackson Group" under the Office Design project. Can you take care of the first interview?
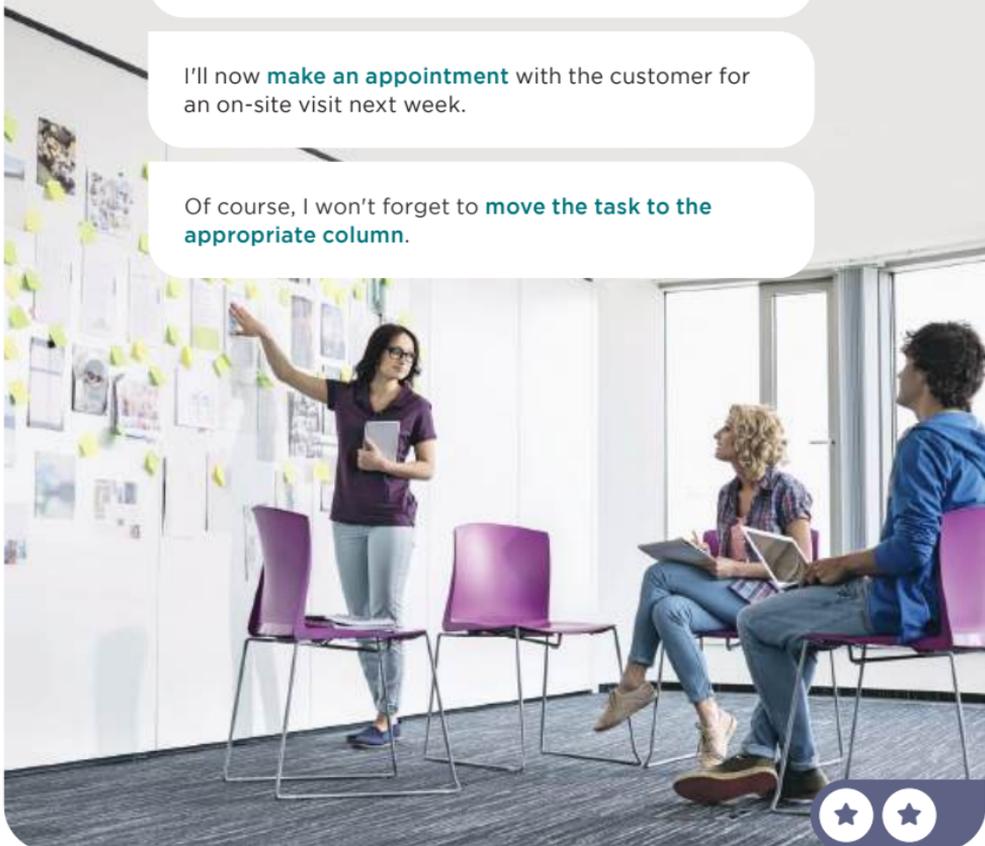
Audrey • Interior Designer

I **added a star to the task** to show it's a priority and had a first meeting with them. It went great!

I'll now **make an appointment** with the customer for an on-site visit next week.

Of course, I won't forget to **move the task to the appropriate column**.

Project

☆ Office Design

✉ design@myofficeinc.odoo.com

1 Tasks

A

Interview   +

1

S00002 - Office Design Service   ⋮

The Jackson Group

🕐 20:00 ★ ☆ ☆   A ○

Schedule activities to help you get things done.

+ Schedule an activity

ℹ

Click on ○ to mark as:

⊘	**In progress**
❗	Changes requested
●	Approved
✕	Cancelled
✓	Done

ℹ

👥 **Meeting**

📅

Schedule a meeting in your calendar

Schedule   **Save**   Discard

You can also schedule
a meeting from the chatter
of the task by clicking on
the Activity button.

Interview

1

On-site Visit

S00002 - **Office Design Service**

The Jackson Group

🕐 20:00 ★ ☆ ☆   A ○

★

Audrey • Interior Designer - 7 days later

The on-site visit went well. I'll set the activity as done.

You

Great! As we charge customers based on hours spent, don't forget to record your timesheet on the task.

Audrey • Interior Designer

Ok, I've been working on the design for the past 2 hours. I'll log the time I spent and move the task to the appropriate column.

For Audrey to be able to timesheet, she has to be an Employee in the system. Right now, she's just a user. Go to: Settings ▶ User ▶ Audrey ▶ **Create Employee**

Project

S00002 - Office Design Service

The Jackson Group

⋮

🌸 `20:00` ⭐ ☆ ☆

1

A ○

Today `1`

On-site Visit ✔
A Audrey

▶ **Done**

2

3

4

ⓘ When the activity is due, its status turns orange. If you haven't waited the full 7 days, it will still appear green. If the activity is not completed on time, it turns red.

Description	Timesheets	Sub-tasks

Date	Employee	Description	Time Spent ⇄
Today	A Audrey	1st draft design	02:00 🗑

Add a line

ⓘ If you want to log your own timesheets, you can do so in the Timesheets app.

On-site Visit + 1

Floor Plan

S00002 - Office Design Service

The Jackson Group

🕐 `18:00` ⭐ ☆ ☆   A ○

⭐

Plan the work

Audrey • Interior Designer

I just had The Jackson Group on the phone. They validated the design! They've confirmed that we can start the work 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 **deadlines** at the same time. And don't forget to **move** the Jackson Group **task to the "Work" stage**.

Project

⭐ **Office Design**   ⋮

1 Tasks 🕐   A ⚪

▶

S00002 - Office Design Service ⋮
The Jackson Group

🕐 18:00 ⭐☆☆   A ⚪

Description	Timesheets	**Sub-tasks**

		Title	**Assignees**		⚙
⠿	⚪	Walls and floors	A Audrey	**View** 🖑	🗑
⠿	⚪	Furniture	A Audrey	V	🗑

Walls and floors

Project	Office Design	**Customer**	The Jackson Group
Assignees	A Audrey	**Deadline**	*In 2 weeks*
Tags		**Allocated Time**	11:00 (0%)

↻ Allocate 7 hours in the "Furniture" sub-task as well.

⭐

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 **7 hours** assembling and placing the **furniture** according to the plan!

You

Great! Don't forget to **timesheet all the jobs** and to mark the **sub-tasks as Done**!

Walls and Floors

Project	Office Design	**Customer**	The Jackson Group
Assignees	A Audrey	**Allocated time**	11:00 (0%)

Description	Timesheets	Sub-tasks

Employee	**Description**	**Time Spent** ⇌
☐ Ernest		

Create and edit...

Description	Timesheets	Sub-tasks

Employee	**Description**	**Time Spent** ⇌
E Ernest	Painting	04:00 🗑
E Ernest	Working on the floor	05:00 🗑
E Ernest	Material	02:00 🗑

Add a line

ⓘ Remember that there are 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.

○	Walls and Floors
○	Furniture

🟢 Approved
❌ Cancelled
✔ ✅ Done

↻ Add the time spent in the "Furniture" sub-task and mark it as Done as well. ⭐

Anita • Accountant

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

You

I will create the draft invoices,
check them and validate them.

keep it
simple.

Invoice customer

Sales To Invoice ▶ Orders to Invoice

Number	Customer	Total	Invoice Status
S00002	The Jackson Group	$ 1,150.00	**To invoice**

Create Invoice

Create Invoice ?   ⦿ Regular invoice

Create Draft

Product	Quantity	Price	Taxes	Amount
Office Design Service	20.00	50.00	15%	$ 1,000.00

Confirm   ▶   Draft ⟩ **Posted**

Manufacture

Your business is booming! MyOffice Inc. is now known for its quality products and services. But lately, you have been feeling the competition from bargain stores that 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
Set up operations & work centers	4
Plan a manufacturing order	5
Add a quality check	6
Check your quality test	7
Control cost	8

Install the apps

Apps

Manufacturing
Manufacturing Orders & BOMs

⋮

Install

Apps

Quality
Control the quality of your products

⋮

Install

Manufacturing   Configuration ▸ Settings

Operations

☑ **Work Orders** ❓   **Save**
Process operations at specific work centers

Define the bill of materials 1

Ronnie • Head of Engineering

Hi, we've 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**

Product
☆ **Table**

☑ Sales   ☐ Purchase

| **General Information** | Sales | Inventory | Accounting |

Product Type ? ⦿ Goods ○ Service ○ Combo

Sales Price ? $ 330.00
Cost ? $ 115.00

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

↻ Create all components. Don't forget to check the **Purchase** and not the Sales box.

🧪 Bill of Materials
0
▸ **New**

ⓘ The BoM is also accessible
from **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

Purchase raw materials
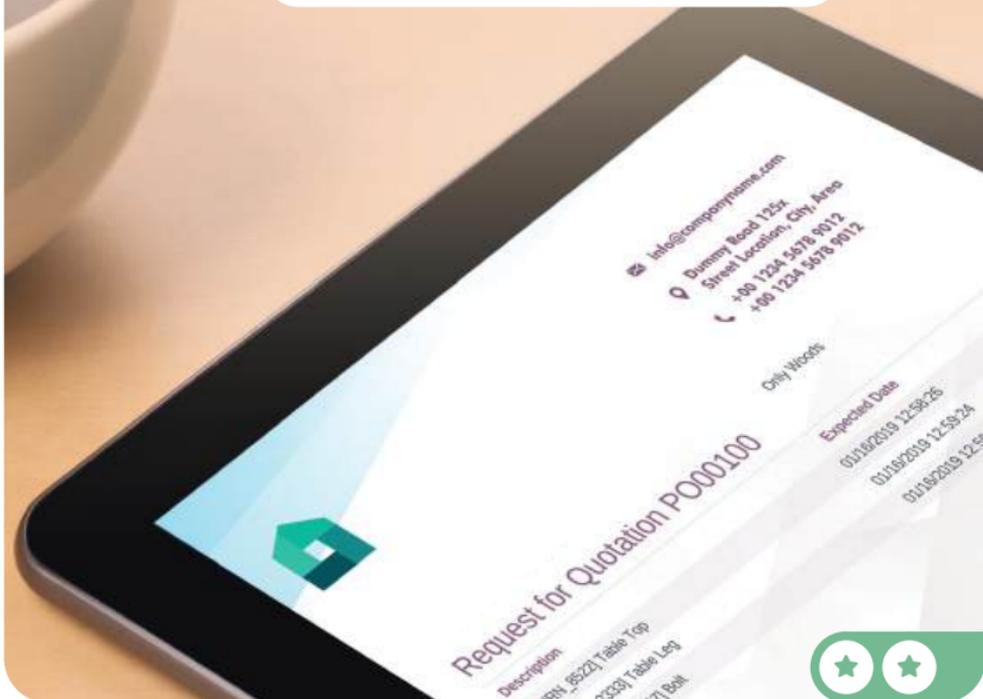
2

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	Orders ▶ Purchase Orders	**New**

Vendor Only Woods Inc.   ▼

Products	Other Information

	Product	Quantity	Unit Price	Taxes	Amount	
⠿	Table Top	100.00	40.00	15%	$ 4,000.00	🗑
⠿	Table Leg	400.00	12.00	15%	$ 4,800.00	🗑
⠿	Bolt	400.00	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. Go to the **Purchase** application **Settings**, activate **Purchase Agreements** and save to see the **Purchase Alternatives** appear.

Products	Other Information	**Alternatives**

☑ **Purchase Agreements** ❓
Manage blanket orders and purchase templates

   ☑ **Purchase Alternatives**
    Link RFQs together and compare them

⭐

Receive products

3

Randall • Inventory Officer

Hello, we've 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 Receive 👆

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

🚚 Receipt 1   **Receive**

ⓘ

Reference	Contact	Source Document	Status
WH/IN/00002 👆	Only Woods Inc.	P00002	Ready

WH/IN/0002

Receive From   Only Woods Inc. ▾

Operations	Additional Info	Note

Product	Demand	Quantity
Table Top	100.00	80.00
Table Leg	400.00	400.00
Bolt	400.00	400.00

Validate

Create Backorder?

You have processed less products than the initial demand.

Create Backorder 👆   **No Backorder**   **Discard**

⭐

Operations & work centers

Sharlene • Manufacturing Engineer

I plan to better organize the manufacturing line by having **2 work centers**: **Assembly Station** and **Painting Room**. Each work center costs the company **$12.5/hour**. Can we set up a tablet with instructions at 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 at 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: www.odoo.com/r/worksheet-table. Could you **upload this worksheet to the assembly operation?**

Operations & work centers 4

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 ▾ ↗

2
Cost per hour ? 12.5 per workcenter

1

Save & Close

Operation	Work Center	Instructions
Assembly	Assembly Station	0 ▤

▸   **New**

Title   Worksheet Table

Instructions	Message If Failure	Notes

Upload your file

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

Plan an order

You

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

Once it is confirmed, operations become available on the tablet at each work station.

Sharlene • Manufacturing Engineer

I'll go to the Shop Floor directly from the Manufacturing application and I'll 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

Manufacturing ▸ Operations ▸ Manufacturing Orders [New]

Product	Table ▾
Quantity	1.00 To Produce 🖼
Bill of Material ?	Table ▾

[**Confirm**] ▸ [🔲 Shop Floor] ▸

Activate your Work Centers ✕

[**Assembly Station** ☑] [**Painting Room** ☑]

[**Confirm**]

WH/MO/00001 (Confirmed)
Table 1 Units

[Assembly Station] Assembly ›

[**Close production**] ⋮

WH/MO/00001 [START]
Assembly
Table 1 Units

Worksheet Table [i] [✓]

⋮

WH/MO/00001 Ⓐ
Assembly
Table 1 Units

Worksheet Table [i] [✓]

⋮

WH/MO/00001 Ⓐ
Assembly
Table 1 Units

~~Worksheet Table~~ [i] [↺]

[**Mark as Done**] ⋮

Painting Room 1 ▸ [START] ▸ [Close Production] ⭐

Rachel • After Sales Services

Hi, we've got 5 customers complaining about a defect in their tables. Looks like the table top begins to detach 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

≡

⟳ Reload Data
⊙ Install App
⊞ Close

Quality   Quality Control ▶ Control Points   New

New

Title   Torque Setting Measurement

ⓘ

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

Products ?	Table ✕	**Type** ?	Measure
Operations	MyOff.: Manufact. ✕	**Norm**	13.00 Nm
Work Order Operation	Assembly	**Tolerance**	from 11.00 to 15.00

ⓘ

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

★

Check your quality test

You

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

Sharlene • Manufacturing Engineer

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

You

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

Check your quality test

Manufacturing Operations ▶ Manufacturing Orders

New

Product	Table ▾
Quantity	1.00 **To Produce** 🖿
Bill of Material ?	Table ▾

Confirm ▶   Draft **Confirmed** Done

Shop Floor ▶   **Assembly Station** 1

WH/MO/00002
Assembly
Table   **START** *1* 🖐
   1 Units

Worksheet Table   ℹ   ✔ *2* 🖐

Torque Setting Measurement   ↔ *3* 🖐
   ⋮

Measure ✕

12.00   nm

Save

WH/MO/00002
Assembly
Table   Ⓐ
   1 Unit

~~Worksheet Table~~   ℹ   ↺

~~Torque Setting Measurement~~ 12Nm   ↔

Mark as Done 🖐   ⋮

Painting Room 1 ▶ **START** ▶ **Close Production**

⭐

Control cost

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

8

≡

↻ Reload Data
⊕ Install App
⊞ Close

Manufacturing   Products ▸ Bills of Materials

Product	BoM Type
⠿ Table	Manufacture this product

≡ **BoM Overview**

Table

Product	Quantity	Cost
Table	1.00	$ 115.00
Table Top	1.00	$ 40.00
Table Leg	4.00	$ 48.00
Bolt	4.00	$ 2.00
▸ **Operations**	120:00	$ 25.00

ⓘ

As Anita doesn't have the user access rights to the Manufacturing app, 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. To connect to your database using your smartphone, go to your browser, search for **https://www.odoo.com/my/databases**. You'll be able to play the game while working on 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

Install

ⓘ If you selected the Inventory application when creating your database, the Barcode application has been automatically added to your database.

ⓘ All the barcodes needed for the following exercises are here.
Keep this card at hand.

WHIN

DESK12345678

OBTVALI

WHSTOCK

OBTPACK

ZONEA

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

!

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 Odoo to use your camera when you hit the "Scan
or tap" 📷 button.
Also, if your phone's camera has a wide angle, hide the barcodes you don't need
with another card to avoid scanning the wrong barcode.

If you use a barcode scanner

1 Plug the barcode
scanner into your
computer.

---

2 As the barcode scanner syncs with the keyboard, open any text editor to
test it. Scan the following barcode to check the settings.

---

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

It works!

---

i

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
or to change the language of your keyboard.

⭐

Set up your product

You

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

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

Sharlene • Manufacturing Engineer

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

Inventory   **Products** ▶ Products

☆ **Large Desk**

Price: $ 220.00

On hand: 7.00

Product

☆ **Large Desk**

☑ Sales   ☑ Purchase

General Information	Attributes & Variants	Sales	Purchase

Product Type ?   ◉ Goods   ○ Service   ○ Combo

Sales Price ? $ 220.00

Cost ? $ 140.00

Barcode   DESK12345678

ℹ

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

★

Receive products

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

IIII **Barcode**

1 Initiate a receipt.

WHIN

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

2 Scan the product, 3 times.

DESK12345678

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

3 Validate the transaction.

OBTVALI

★

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 away! Your email address is still brandon@game.odoo.com, right?

Brandon • Customer

That's correct!

Sales   **Orders** ▸ Quotations

New

Customer   Azure Interior, Brandon ▾

Order Lines	Optional Products	Other Info

Product	Quantity	Unit Price	Taxes	Amount
Large Desk	3.00 📊	220.00	15% ×	$ 660.00

Add a product   Add a section   Add a note

Untaxed Amount: **$ 660.00**
Tax 15%: $ 99.00
Total: **$ 759.00**

Send ▸ Quotation ⟩ **Quotation Sent** ⟩ Sales Order

Confirm ▸ Quotation ⟩ Quotation Sent ⟩ **Sales Order**

★

Deliver products

5

Sophia • Sales Manager

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

I'm not sure it will fit in one **package**.
You'll need to **pack them in different packages.**

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**.

In order to deliver the products in packages, you need to activate the
Packages option: Inventory ▸ Configuration ▸ Settings.

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 | ▸ ☆ **WH/OUT/00002**   **Ready** |
| | | Azure Interior, Brandon |

1 ‖‖‖‖‖‖‖‖‖‖‖‖
DESK12345678

2 ‖‖‖‖‖‖‖‖‖‖‖‖
DESK12345678

3 ‖‖‖‖‖‖‖‖‖‖‖‖
OBTPACK

4 ‖‖‖‖‖‖‖‖‖‖‖‖
DESK12345678

5 ‖‖‖‖‖‖‖‖‖‖‖‖
OBTPACK

6 ‖‖‖‖‖‖‖‖‖‖‖‖
OBTVALI

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

★

Adjust inventory

Roger • Inventory Manager

Hi, the system tells me there are 7 Large Desks on hand. However, I see only 6 in the warehouse.

You

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

Adjust inventory

▌▌▌ Barcode	▸	**Count Inventory**	

1 Scan 3 times

DESK12345678

2 Validate the inventory

OBTVALI

Define locations

Roger • Inventory Manager

Our average picking time 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 Zone A, closer to the packing zone. Less frequently sold products should go in Zone C, at the end of the warehouse. Can you **activate the storage location** feature in the **Settings**?

Roger • Inventory Manager

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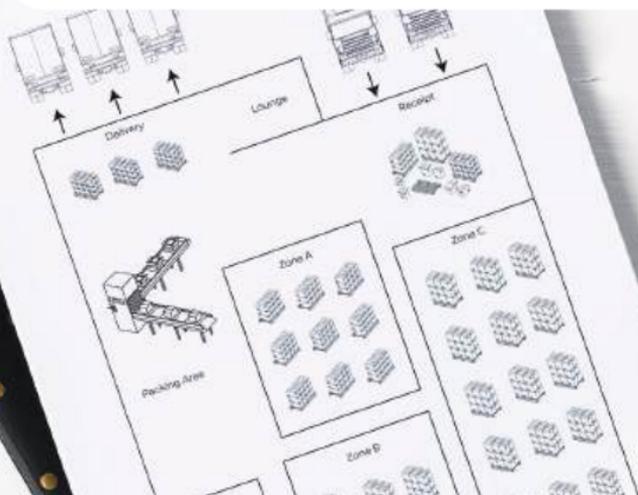
Inventory   **Configuration** ▸ Settings

Warehouse

☑ ### Storage Locations ❓
Track product location in your warehouse

Save

Inventory   **Configuration** ▸ Locations

New

ZoneA

Parent Location
WH/Stock ▾

ℹ️ 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

ℹ️ The barcode of a location is usually scanned from the shelf. It's scanned to record where the products were taken from and where they will be moved.

★

You

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

Can you **move 3 Large Desks** from the location **WH/Stock** to **ZoneA**?

Sharlene • Manufacturing Engineer

Ok, I'm on it.

Move products

Barcode

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

WHSTOCK

2 Then, scan 3 times
the products you picked.

DESK12345678

3 Next, scan the destination shelf:
ZONEA.

ZONEA

4 Finally, validate it.

OBTVALI

Manage
your team

Now that you have set up a business management software, operation flows are automated and your business is growing! 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

[**Install**]

Do the same for all these applications:

Employee Referral	Time Off
Appraisals	
Employees	Expenses

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... | ▾

ℹ️ The **Employee 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 **"Skip and start from scratch"** in the bottom right corner. Note that if you're planning to play the Sell Online use-case after, you will have to create your website from scratch (with no template).

Create a job description

1

Eli • Marketing Manager

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

You

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

Eli • Marketing Manager

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

You

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

Create a job description

Recruitment

New

Create a Job Position

Job Position   Marketing Community Officer

Application email **?** marketingcommunityofficer@myofficeinc.odoo.com

Create   Discard

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

New   **Job positions**
Applications ⚙

▶   ☆ **Marketing Community Officer**   Configure

Details	Summary	Application Info	Trackers

The Marketing team is looking for someone with the following skills:

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

ⓘ Publish the job offer on your website via the Details tab.   **Published ?** 🟢

★

Refer a friend

2

Audrey • Employee

Hey! I saw your job description for a Marketing 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 use the **Referrals App to send him the job offer by email?**

Audrey • Employee

Great idea!
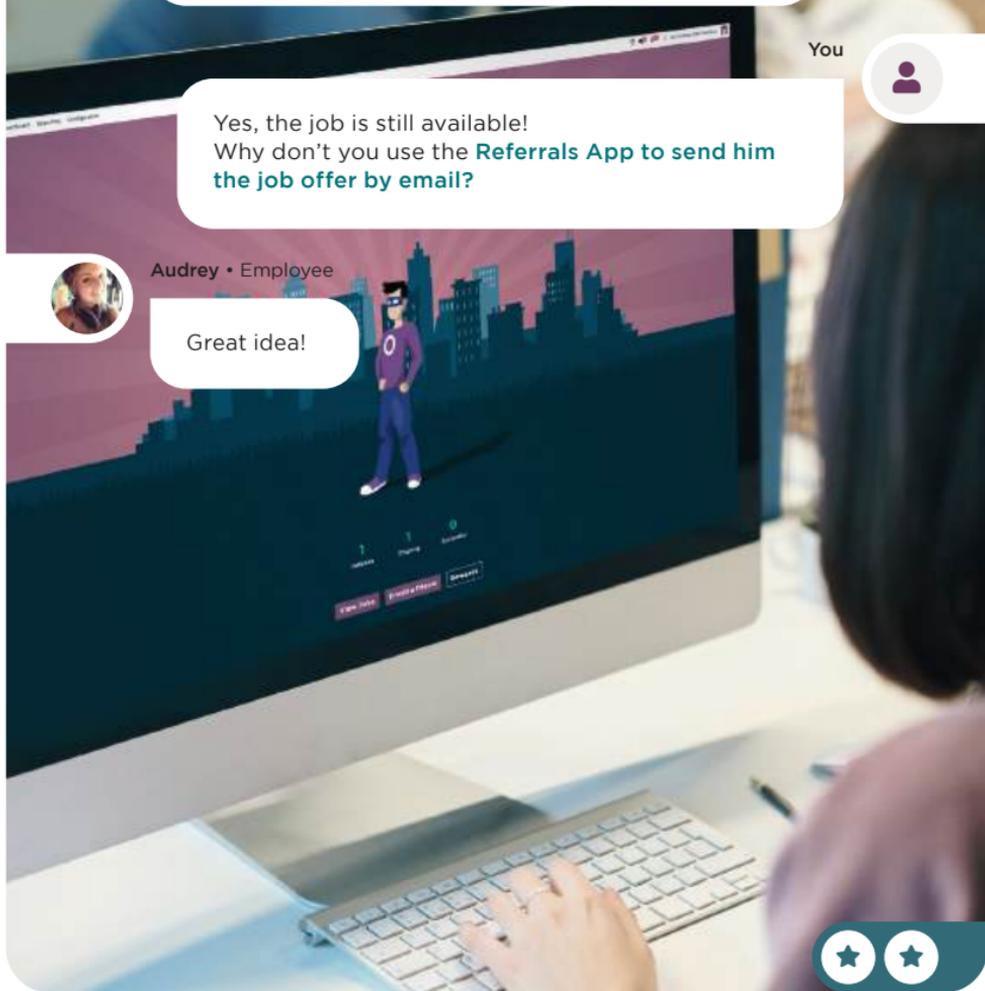
Referrals

Marketing Community Officer

1 Open Position

⭐ **100 Points**

The Marketing team is looking for someone with the following skills:

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

✉ **Send Email**

📱 **Send SMS**

🌐 **Job Page**

Send Job Offer by Mail   ✕

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

Subject   Job for you

Body   Hello,
               There is an amazing job offer for a Marketing Community
               Officer in my company! It will be a fit for you.
               See Job Offer

Send Mail   **Cancel**

ⓘ

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 homepage of the **Referrals** app,
you'll send your friend all the jobs available in your company.

⭐

Eli • Marketing Manager

The interview with Jeffrey Kelly was great! I'd 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'll create a new **Contract Template** for **Marketing Community Officer**. As discussed, it will be a **monthly cost of $3,250** 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.

Make an offer

Recruitment

☆ **Marketing Community Officer**   **1** to recruit   **1** new applications   **1** in progress

A Administrator

🛈 In order to see "**1 new applications**", you need to apply for this position. You can do so by sending the **referral link** to your own email address or by applying on the **website**.

Second Interview	+	Contract Proposal	+

Jeffrey Kelly
Marketing Community Officer

☆ ☆ ☆ 🕐   A

Generate Offer

Offer for Jeffrey Kelly   ✕

Contract Template   Marketing Community Officer

Job Title   Create and edit...   ficer

Employee Job   Marketing Community Officer

Send By Email

⭐

Eli • Marketing Manager

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

You

Yes! I'll **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 Tuesday and Thursday and the rest at the **office**.

He is officially part of the company, yay!

Jeffrey Kelly
Business mobile:
456 065 8856

Recruitment

Marketing Community Officer
A Administrator

1 to recruit   0 new applications   1 in progress

Jeffrey Kelly
Marketing Community Officer
☆☆☆ 🕐   A

Contract Proposal > Contract Signed

Create Employee ▶

Jeffrey Kelly

| Work | Resume | Certifications | Personal | Payroll |

WORK

Create and edit...

Manager   Eli Lambert

REMOTE WORK

Specify your default work location for each day of the week. This schedule will repeat itself each week.

Monday	Office
Tuesday	Home
Wednesday	Office
Thursday	Home
Friday	Office
Saturday	Unspecified
Sunday	Unspecified

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

Evaluate your employee

5

Eli • Marketing Manager

Hello, while I'm thinking about it, could you **create an appraisal** for **Jeffrey**. Please make sure I'm assigned as the manager.

You

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

Eli • Marketing Manager

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

You

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

In order to ask other employees for feedback, activate the feature **360 Feedback**: Appraisals ▶ Configuration ▶ Settings.

Evaluate your employee

⭐ Appraisals

New

Jeffrey Kelly

Manager E Eli Lambert

Appraisal Date *6 month from today's date*

| Appraisal | Private Note |

Employee's Feedback

Self Assessment will
show here once published.

Manager's Feedback

Manager Assessment will
show here once published.

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

Ask Feedback ✕

Survey Template 360-Feedback

Recipients Add employees...

Subject Take part in Jeffrey Kelly appraisal

Send

Schedule your time off

Jeffrey • New employee

Hello, when I signed my 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 31st of December**.

Then, you'll be able to create a **new time off** for June with your **Paid time off**.
But since I'm already in the system, I'll do it for you.

Time Off | **Management** ▸ Allocations | **New**

Paid Time Off

Time Off Type	Paid Time Off	**Employee** Ⓙ Jeffrey Kelly
Validity Period	*Today's date* → *12/31/year*	
Allocation ?	20.00 Days	

☁ ▸ | **Validate** | ▸ | To Approve | **Approved**

Time Off | **Management** ▸ Time Off | **New**

Jeffrey Kelly on Paid Time Off: 3 days

Employee	Ⓙ Jeffrey Kelly
Time Off Type	Paid Time Off
Dates	*Day 1* → *3 days later*

☁ ▸ | **Approve**

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

📅 Time Off
17/20 Days

★

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 **Expenses app**. It will help the accounting department.

Make sure to make a **new expense** and **submit it to your manager** (me). I will **approve it**.

Expenses

New

Description
Welcome Lunch for Jeffrey

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

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

☁ ▶ **Submit** ▶ Draft **Submitted** Approved Posted Paid

Approve ▶ Draft **Approved** Posted Paid

ⓘ In a company, the employee submits an expense and the manager validates it.
For the purpose of the game, you performed both roles.

★

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. Therefore, you plan to digitize all invoices to become more efficient and save office space.

Download and **import** vendor bills	**1**
Validate vendor bills	**2**
Connect your bank	**3**
Record and **reconcile** bank transactions	**4**
Analyze the partner ledger	**5**
Analyze the profit and loss statement	**6**
Generate the tax report (only within the European Union)	**7**

Digitalize Accounting

Please note: first and foremost, you must configure your chart of accounts according to your local legislation. You will find all the information you need here: **https://www.odoo.com/r/fiscal_localizations.**

Tax rates vary according to your location, which means the end result of your financial statements might differ.

Step 7 – Generate the tax return only applies to countries within the European Union.

Download and import vendor bills

1

Paul • Secretary

Hi, we've received several vendor bills this morning. You said you wanted to go digital, so I've already scanned them. They're on https://www.odoo.com/r/vendor-bills. Can I ask you to import them into the system?

You

Yes, thank you! I'll **download** them and then **import** them into the **Accounting app**.
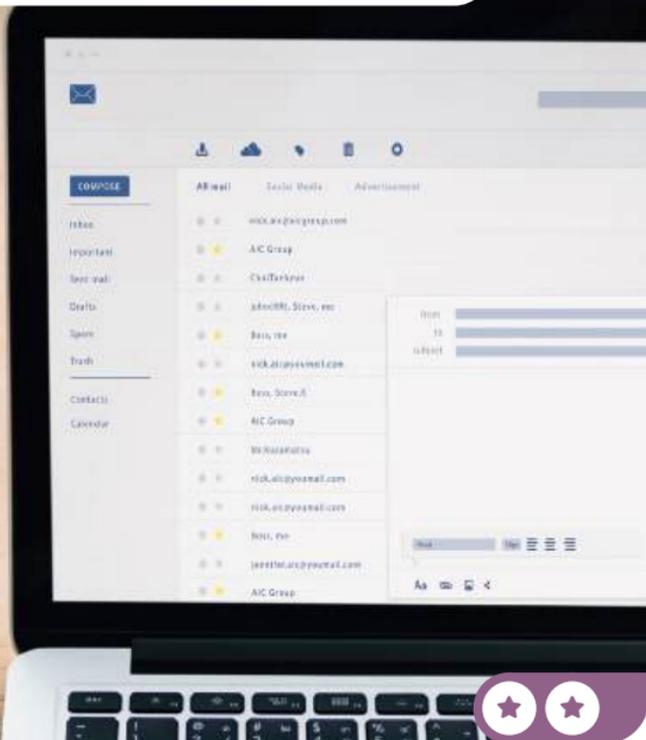
Accounting

💡 Don't forget to unzip them if you've downloaded a **.zip** file.
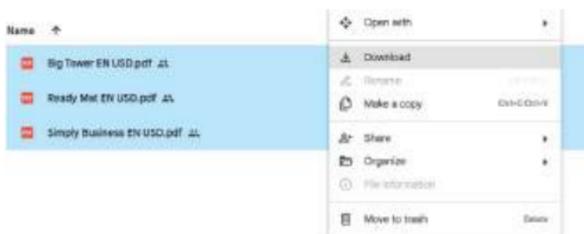
Accounting   **Vendors** ▶ Bills

Upload

ℹ Select the 3 previously downloaded bills to upload them into Odoo.

ℹ Odoo uses AI to recognize and extract data from documents. It enters it automatically to avoid manual data entry.

☐	Number	Vendor	...	Due Date	Status
☐	/	Simply Business		4 days ago	Draft

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

⭐

Validate vendor bills

2

You

Anita, we have new **vendor bills** to validate. Could you take care of them, please?

Anita • Accountant

I'm on it.

You

Be careful, amongst the bills to validate, you'll find a payment notice for an insurance policy, which needs to be allocated monthly.
Once the **start and end dates** are **added** and the **bill** is **confirmed**, you'll be able to access the deferred entries.

Don't forget to check the automatically generated entries. **Create** or **select** the right expense and revenue **accounts**: one for **liability insurance (613000)**, one for **rent (612000)** and one for **equipments (614000)**.

Validate vendor bills

Accounting   Vendors ▶ Bills

Vendor	Bill date	Reference	Tax Excluded	Status
Ready Mat	Jan 8	784.	$ -434,78	**Draft**
Simply Business	Jan 15	INV/2025/00001	$ -984,00	**Draft**
Big Tower	Jan 1	785.	$ -1.500,00	**Draft**
			$ -3.918,78	

💡 For the insurance bill, you need to enable the option to specify a start date and an end date so that Odoo can automatically allocate the expense to the relevant months.

Don't forget to check the charging accounts.

Simply Business	Jan 15	INV/2025/00001	$ -984,00	**Draft**

Invoice Lines	Journal Items	Other Info

Account	Start Date	End Date	Quantity	Price
613000	07/01/2025	06/30/2026	1,00	

Create and edit...

- ☐ Product
- ☑ Start Date
- ☑ End Date

Confirm   ▶   ☰ Deferred Entries

↻ Create or select the right accounts for the 2 others bills and confirm them.

ⓘ The **"deferred charge"** is an expense that you have paid now, but which relates to a future period.

You

Anita, we're working with a new bank, **Odoo Bank Sync Demo**. Could you **connect** it directly to our system?

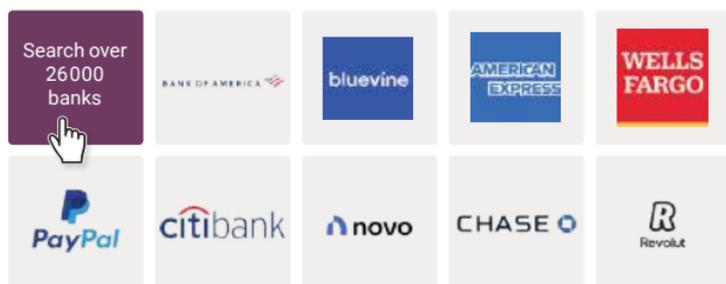**Anita** • Accountant

Yes, I'll take care of it.

Connect your bank

Accounting   Dashboard

Bank

Connect your bank. Match invoices automatically.

Search over 26000 banks	BANK OF AMERICA	bluevine	AMERICAN EXPRESS	WELLS FARGO
PayPal	citibank	novo	CHASE	Revolut

Add a Bank Account

🔍 Odoo bank

Odoo Bank Sync Demo

Provider   **Type of account**

Odoo   🔘 Business   ⭕ Personal   ⭕ Corporate

Odoo Bank Sync Demo Simulate a bank connection, without involving a real bank. Fake transactions are created in the database instead.

Connect   **Cancel**

Proceed ▸ **Connect Bank**

Record and reconcile bank transactions

4

You

Did the connection to the bank go smoothly?

Anita • Accountant

Yes, it went great. I'll now be able to **record bank transactions and reconcile operations**.

Accounting

This page should appear when connecting to your bank.
If not, go to **Dashboard** and click on the **to reconcile** button in your **Bank**.

	Current Balance			$ 1,363.50
	Downpayment for your services	Brandon, Azure Interior	Reconcile 1	$ 350.00

☑	**Journal Entry**	**Partner**	**Amount Due**
☑	INV/2025/0001	Brandon, Azure Interior	$ 759.00

Select

	Current Balance			$ 1,363.50
	Monthly Office rent	Big tower offices	Set Partner	$ -1,500.00

	Name	**Email**
B	Big Tower Group	rool@odoo.com

Repeat the operation for the Ready Mat bill.

	Current Balance			$ 1,363.50
	Monthly Bank Fees	Your big bank	Bank Fees	$ -3.50

Current Balance		$ 1,363.50
Opening statement: first synchronization		$ 4,001.00 ⌄

Reconcile | Set Account | Internal Transfer | ⌄
1
2

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

You

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

Anita • Accountant

Of course, let me check the Partner Ledger report.

Accounting   **Reporting** ▶ Partner Ledger

ⓘ

> The results are based on information obtained during the Buy
> & Sell case study. If you haven't done it, you'll get different results.

	Journal	Account	Invoice Date	Due Date	Matching	Debit	Credit	Amount Currency	Balance
▶ Big Tower Group						$ 1,500.00	$ 1,500,00		$ 0.00
▶ Azure Interior, Brandon						$ 759.00	$ 350,00		$ 409.00
▶ Ready Mat						$ 500.00	$ 500,00		$ 0.00
▶ Simply Business						$ 984.00	$ 984,00		$ 0.00
▶ Wood Corner						$ 0.00	$ 1,150.00		$ -1,150.00
Total						**$ 3,743.00**	**$ 4,484.00**		**$ -741.00**

ⓘ

> If you haven't created a credit note in the Buy & Sell case study, you won't get the
> same debit and credit. However, the balance remains the same.

ⓘ

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

★

You

Can you prepare the Profit and Loss statement? Our new bank is requesting it as part of our business relationship. Could you tell me if we're in profit or loss?

Anita • Accountant

Of course, I'll look into it right away!

Annual Inco
Statement

A summary of the company's earnings

SOCIAL MEDIA REPORT

02

ABOUT DIGIP
PROMOTIONAL

Accounting   **Reporting** ▶ Profit and Loss

The Profit and Loss statement is an accounting document that summarizes the financial performance of a company over a given period (usually a year). It shows the **revenue** (or income) and **expenses** (or charges) to determine whether the company has made a **profit** or a **loss**.

You can always refer back to the original accounting document by clicking on the corresponding amount.

▸ Revenue	660.00
Less Costs of Revenue	0.00
Gross Profit	**660.00**
▸ Less Operating Expenses	3,430.28
Operating Income (or Loss)	**-2,270.28**
Plus Other Income	0.00
Less Other Expenses	0.00
Net Profit	**-2,770.28**

Depending on the date you conduct this case study, the result may vary. Remember the deferred entries for the Simply Business bill!
Besides, don't forget that, depending on your location, the result may vary as well.

Generate the tax report

You

The quarter is coming to an end; it's time to close the VAT period.

Anita • Accountant

Are you sure all the bills have been entered correctly?

You

Yes, I've checked, everything is fine.

Anita • Accountant

Perfect, I'll **generate the tax report**.

You

Could you tell me where we stand?
Do we need to plan for a VAT payment, or are we entitled to a VAT refund?

Anita • Accountant

Sure!

Accounting   **Reporting** ▶ Tax Report

The acronym VAT stands for "Value Added Tax." It refers to a tax charged to customers on goods they consume or services they use.
It is up to professionals (both freelancers and companies) to collect it on taxable transactions, declare it, and ultimately remit it to the State.
Consequently, a business does not "pay" VAT in the strict sense; it simply takes on the administrative responsibility of collecting and remitting it to the State.

This step only applies to countries within the European Union. This is therefore not valid for the United States.

Close *new deals*

Until now, you have been using an Excel sheet to organize information about your past, present, and future clients. However, with the recent growth of your business, you are finding it increasingly difficult to stay organized with all the new clients coming in! To solve this problem, you decide to invest in a Customer Relationship Management (CRM) system.

Install the CRM application to manage 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
Analyze expected revenue	8

★ ★

Install the app

Apps

CRM
Track leads and close opportunities

Install

Import ongoing leads

You

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

Sophia • Sales Manager

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

You

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

CRM Pipeline ⚙ ▶

⬇ **Import records**
...

Upload Data File ⬇ Select the file **Ongoing leads CRM.csv** you've downloaded on **https://www.odoo.com/r/CRM-leads**

Contact	⤏ Contact ✕
Mike G.	
Email	Ab Email ✕
Mikeg@mailinator.com	
Notes	⊕ Notes ✕
Mike G. was very interested...	

Test

No maching records found
for the following name in field **Contact:**

...

When a value cannot be matched:

Create new values ⌄

Prevent import
Set value as empty
Skip record
Create new values

↻ Repeat this step for the **Tags** field.

Import ★

Generate leads

2

Sophia • Sales Manager

Hey, we're facing an issue: the current leads are only sufficient for a few members of the sales team. The other members don't have any lead 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, Capital Goods, and Real Estate.

CRM

Generate Leads

Need help reaching your target?

How many leads would you like?

10   Companies

Countries   United States ✕

Industries   Retailing ✕   Health Care Equip... ✕   Real Estate ✕

Generate Leads

Create a new opportunity

Sophia • Sales Manager

The CRM looks great! Our pipeline is full of leads now! I'll assign them to my team members. By the way, I met **Kary Maxwell** at the Furniture Expo yesterday. Here is her business card. She's interested in purchasing **6 desks**! 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) 456-7892

CRM

New

Company
Kary M.
Kary M.'s opportunity
karym@agrolait.com
(123) 456-7892
$ 1,320.00 ⭐⭐⭐

Add

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

⭐⭐⭐

A

Schedule activities to help you get things done.

+ Schedule an activity

Schedule Activity

✔ To-Do	✉ Email	☎ Call	👥 Meeting

Summary   Call

Due Date   today's date

Assigned to   **A** You

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

Save

ⓘ Odoo allows you to take or upload a photo of a business card and automatically generates a lead from it.

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 desks?

Kary • Prospect

Hi! Thanks for getting back to me! Yes, I'd like a quote for 6 Large Desks. I'm looking to receive them within the month.

You

Sure thing, I'll go ahead and send you the quote by email. I'll also mention the timeframe you're looking at in our notes.

CRM

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

★★★ 📞

A

▶

New Quotation

Customer Kary M. ▾

Order lines	Optional Products

Product	Quantity	Unit Price	Amount	
Large Desk	6.00	220.00	$ 1,320.00	🗑

Add a product

Send ▶ Quotation **Quotation Sent** Sales Order

Send message **Log note** **Activity**

A

Call with Kary went well. She is interested in purchasing 6 desks and hopes to have them delivered within the month. ☺

Log

🏷 📎 ⤢

★

Provide a discount

5

Kary • Prospect

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

You

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

Kary • Prospect

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

You

Ok, I will do so. I'll also set a reminder to contact you by email in 2 days.

Activate the **Discount Option**:
Sales ▸ Configuration ▸ Settings ▸ ☑ Discounts

CRM

Kary M.'s opportunity
$ 1,320.00
Kary M.
⭐⭐⭐ 🕐   A

▸ Quotations
1

	Order lines	Optional Products

Product	Quantity	Unit Price	Disc. %	Amount	
Large Desk	6.00	220.00	5.00	$ 1,254.00	🗑

Send	▸	Send message	Log note	Activity

Schedule Activity

✔ To-Do	✉ Email	📞 Call	👥 Meeting

Summary   Email
Due Date   in 2 days
Assigned to A You

Touch base

Save

Organize your CRM

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 to whom we've already sent a quote.

You

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

&model=crm.lead

ifiguratior

Waiting for Feedback

+

0

+

79,100

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

Organize your CRM

CRM

New	+ Qualified	+ Proposition	+ Won	+	Stage

Waiting for Feedback ✓ ✗
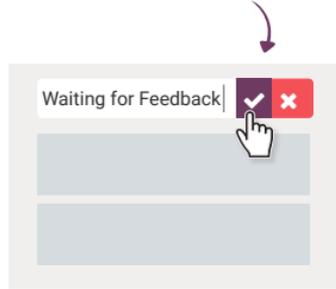
💡 You can simply drag and drop the "Waiting for Feeback" column to place it before the "Won" column.

Proposition 1

Waiting for Feedback

Kary M.'s opportunity

$ 1,320.00
Kary M.
⭐⭐⭐ 🕐

A

You • Two days later

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

Kary • Prospect

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

You

Sounds good!

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

★ ★ ★ 🕐   A

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

Quotations
1

Confirm ▶ 🚚 Delivery
1 ▶ **Scheduled Date** in 2 weeks

Sophia • Sales Manager

Our pipeline looks 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 clearer that way.

CRM   **Reporting** ▸ Pipeline

Measures ▾   **Insert in Spreadsheet**

✓ **Expected Revenue**
   Prorated Revenue

Measures ▾   **Insert in Spreadsheet**   ⇄ ✛ ⤓

Create *your App*

Following the great feedback you've received from your Office Design services, you are feeling ambitious and want to take things further. You're now planning to rent fully-furnished offices.
You already have a few, but you need a dedicated app to manage your properties.

Install the Studio app to run the following business flow.

Initialize your app	1
Design office forms	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

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.

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

New App

Discuss

Create your App

Choose an app name

Office Rental

NEXT >

Design your Icon

Create your first menu

Choose the name of the menu

Offices

○ New Model

Suggested features for your new model

☑ **Picture**
Attach a picture to a record

☑ **Monetary value**
Set a price or cost on records

Create your app >

Design office forms

2

You

What information do you need on an office form?

Sophia • Sales Manager

I 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 forms

2

+ Add

New Fields

$N°$ **Integer**

Ab **Text**

Selection

Name

Value

Label
Rent

Capacity 0

Address

If you want to use existing contacts for the address, use a *Many2One* with the relation "Contact", instead of a *Text* field.

≡ Open Space

≡ Closed Space

Confirm

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

✏ Edit Menu   + New Model   Close

Record your offices

3

You

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

Sophia • Sales Manager

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

Leased | $ 65,000

Chestnut
1450 Chestnut Street
Closed Space • 150 desks

Available | $ 2,000

Creekside
645 Creekside Drive
Open Space • 15 desks

Available | $ 3,500

Merriman
4597 Merriman Street
Open Space • 45 desks

Office Rental ▸ | New |

Merriman

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

Repeat this operation to create the 2 other offices.

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

Sophia • Sales Manager

I can't believe that you've created this app 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

✎ Edit Menu   + New Model   **Close**

Webhooks   Acess Control   Filter Rules   🖼 ☰ 📈 🏢 🔍

Add a pipeline status bar

Field Properties

☰	Available	✎	🗑
☰	Leased	✎	🗑
☰	To renew	✎	🗑

Confirm

▸   **Close**

New	Offices
	Cr..._ide ⚙

☐	**Name**
☐	Merriman
☐	Chestnut

Available › Leased › To renew

★

Bonus Point • If you have changed the status of the 3 offices.   ★ ★

Add a kanban view

Sophia • Sales Manager

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

You

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

Add a kanban view

⬛ **Office Rental**   Offices

Views

Multiple records views

Activate View

Kanban
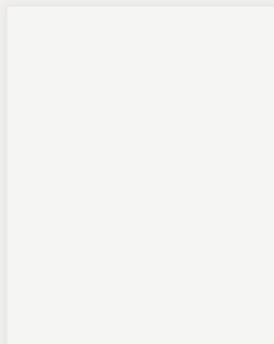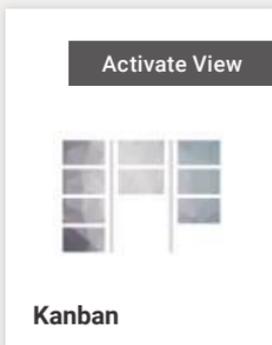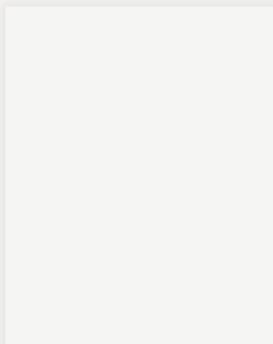
🖵 **View**

Available (2)

Merriman

Default Group by

Pipeline status bar ✕ ▾

Close

Automate an activity

6

You

How do you make sure our clients are happy?

Sophia • Sales Manager

I ask them when I think of it.

You

Let's make this more professional by **adding a new action** on the stage "**Leased**". Once an office reaches this stage, a new **activity of type "To Do"** should be automatically created with the **title "Check up on new renter"**, scheduled **1 month later**.
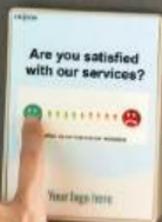
::: Office Rental   Offices

Available (2)   +

| Merriman |
| Creekside |

Leased (1)   ⚙

| Chestnut |

Fold
Automations

New

Offices
Automation Rules ⚙

Stage "Leased"

Trigger   On create and edit

Apply on ?   ▼ Match all ▼ of the following rules: **+ Add condition**

2   Pipeline status bar   is e.. .▼ Leased   ▼   1

When updating ?   Pipeline status bar ×

Actions To Do

Add an action

Create Actions

Type ?	Create Activity	**Due Date in**	1 Months
Activity Type	To-Do	**User Type** ?	Specific User
Title	Check up on new renter	**Responsible**	Sophia

Save & Close

★

Improve the list view

Sophia • Sales Manager

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

You

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

::: Office Rental   Offices

Existing Fields ▾

| Type | N° Capacity | Pipeline status bar |

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

Close

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

Create statistic reports

You

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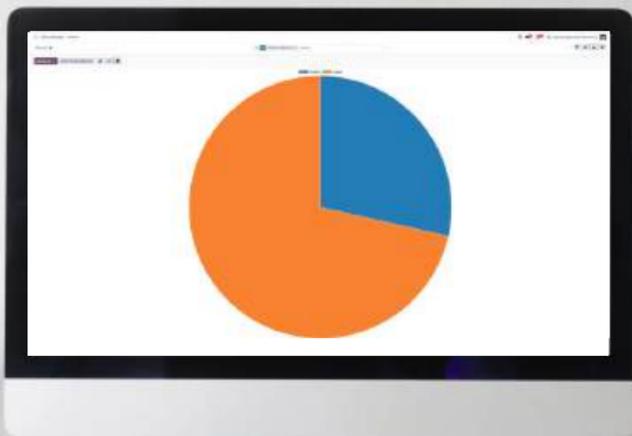
Sophia • Sales Manager

Why don't you **create a graph view**?

You

Good idea, I'll get the availability ratio **(percentage of available offices by type).**
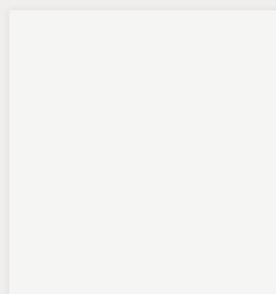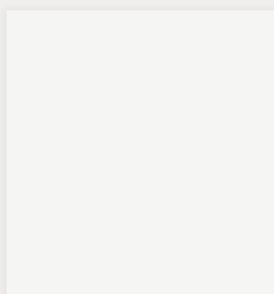
keep it **simple.**

Create statistic reports

Office Rental   Offices

Views

Reporting Views

Graph

Close

Offices ⚙

Measures ▾   **Insert in Spreadsheet**   📊 📈 📊

✓ **Capacity**
   Rent

🔍 Search...   ▾

☰ Group By ▾

Custom Group ▾   ▸   Pipeline status bar

                        Type

⭐ **Bonus Point** • You get an extra ⭐ if you selected "Pipeline status bar" and "Type".

⭐ ⭐