

SCALE! UP!



The Business Game

odoo



This game is adapted for Odoo 19.

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More info: odoo.com/scaleup



Your Story

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

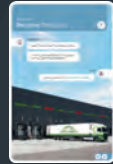
Good luck with your new business!



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:

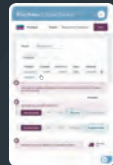
- 1 Read the instructions on the front of the card. **Don't look at the back yet!**



- 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

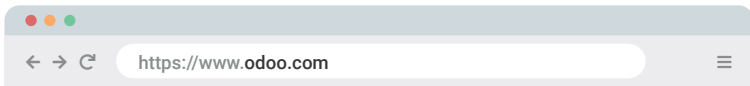
8

Analyze profits

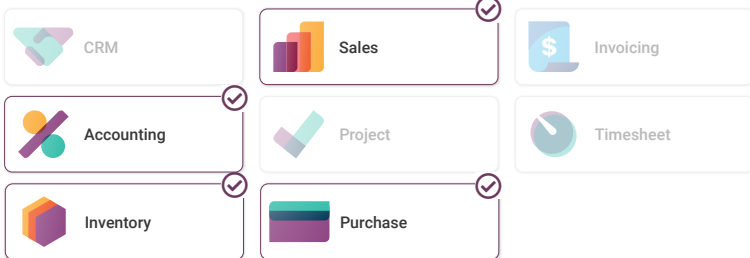
9



Install the apps



Start now - It's free



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

Start Now



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

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

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



Buy & Sell

Create a product

1



Marc • Purchase Manager

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

You



How much do they cost?



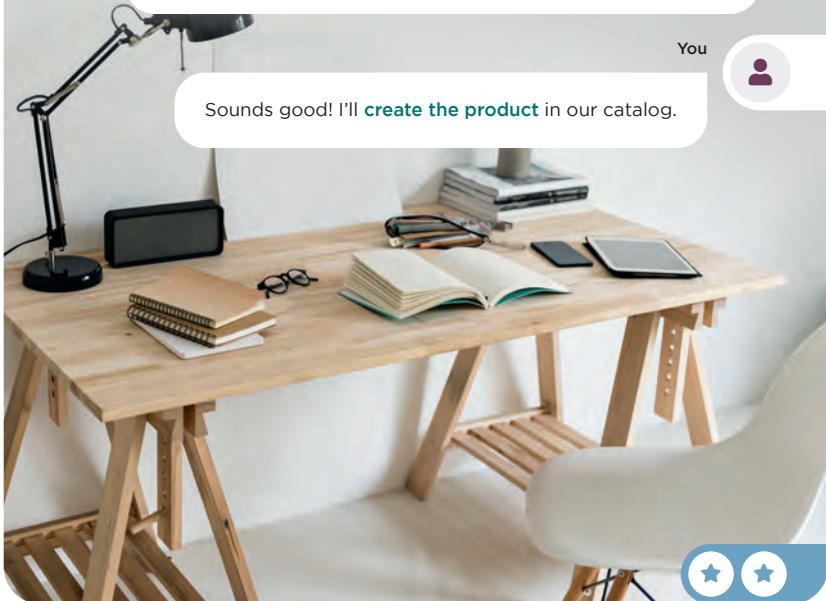
Marc • Purchase Manager

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

You



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





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	🗑️
⋮ Wood Corner	1.00	140.00	🗑️

Create "Wood Corner"



Buy & Sell

Purchase large desks

2

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



Buy & Sell

Receive products

3



Incoming Call...

Hello, I'm the driver from Wood Corner.

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

You



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





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



Buy & Sell

Control the bill

4



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**



Control the bill

4



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



Buy & Sell

Sell products

5



Brandon • Customer

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

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

You



You'll get it by email right now!



Brandon • Customer - 1 hour later

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



Sell products

5



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 Co
1164 Ca
White Ta
United St
accounti

Quotation #S0001

Continue

Discard

Confirm



Quotation

Quotation Sent

Sales Order



This button takes you directly to the Delivery Order.



Delivery
1



Buy & Sell

Deliver to customer

6



Roger • Inventory Manager

I'm in a meeting this morning.

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

You



Okay, I'll check this right away!





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.



Buy & Sell

Invoice customer

7



Anita • Accountant

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

You



I'm on it!



Invoice customer

7



Sales

To Invoice ▶ Orders to Invoice

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



Create Invoice

Create invoice(s)

Regular invoice

i

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



Buy & Sell

Record payment

8

Inbox (1)



PAYMENT NOTIFICATION

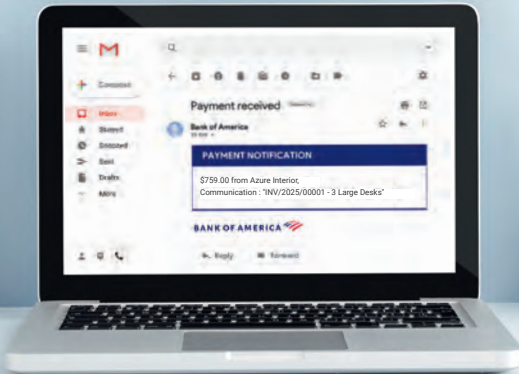
\$759.00 from Azure Interior

Communication: "INV/2025/00001 - 3 large desks"

You



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



Record payment

8



Accounting

Customers ▶ Invoices

Customer

Total

Status

Azure Interior, Brandon

\$ 759.00

Posted

Pay



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



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

Create Payment

Draft

Posted



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.

IN PAYMENT



Buy & Sell

Analyze profits

9

You



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



Anita • Accountant

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



Analyze profits

9



Accounting

Reporting ▶ Profit and Loss

i

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

i

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

Congratulations!



What's next? Choose your strategy:

Run a Store

Start selling in your showroom.

Sell 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.

- 1 **Import** products
- 2 **Configure** cash control
- 3 **Sell** 3 office lamps
- 4 **Cash out** money
- 5 **Sell** with an invoice
- 6 **Return** 1 office lamp
- 7 **Control** cash
- 8 **Analyze** the POS sales



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



Sales



Calendar



Purchase

Point of Sale

▼ + New Shop



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.



Run a Store

Import your products

1

You



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

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



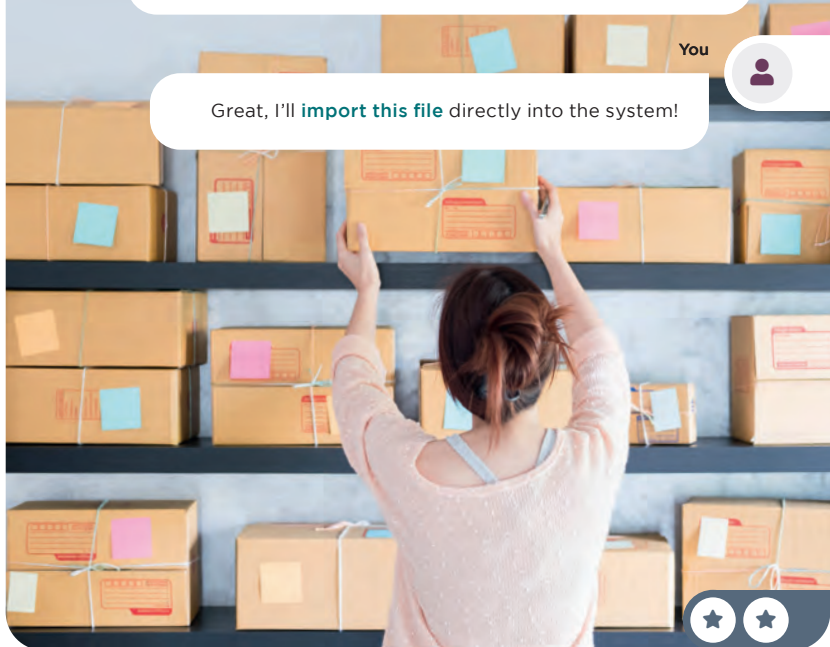
Roger • Inventory Manager

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

You



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



Import your products

1



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

i

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

i

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

Chairs

Desks

Misc



Run a Store

Configure cash control

2

You



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

Anita • Accountant



Sure. I can give you \$550.

You



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





Opening Control


Opening cash



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.



Run a Store

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**.



Sell 3 office lamps

3

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.



Run a Store

Cash out money

4



Anita • Accountant

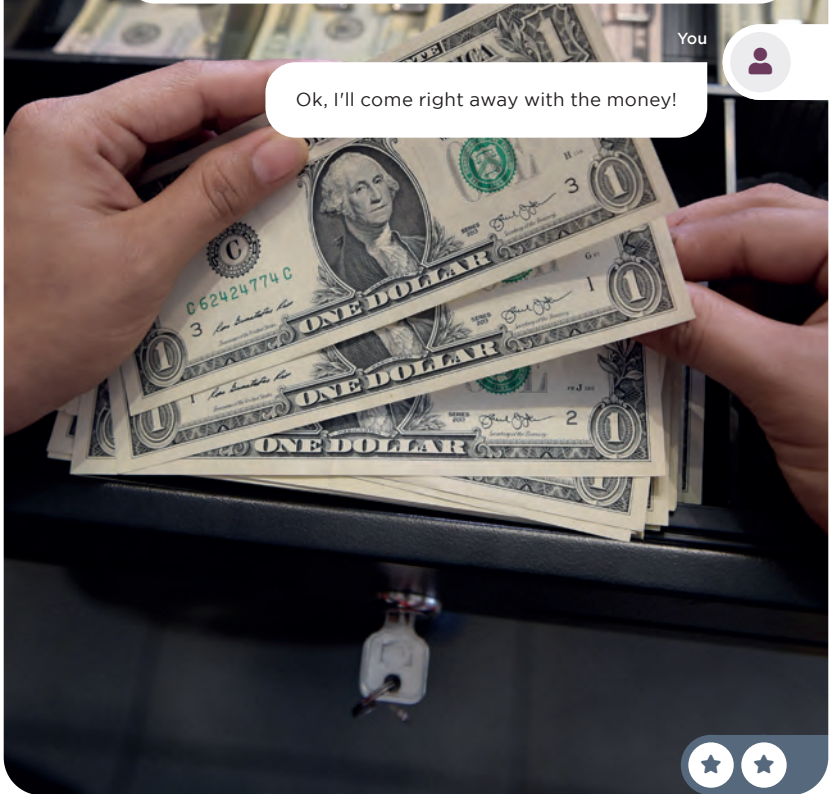
It's lunch time! Your sandwich has just arrived!

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

You



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





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.



Run a Store

Sell with an invoice

5



Jennie • Customer

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

You



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



Jennie • Customer

Yes, my name is **Jennie Fletcher, 3000 Hannah Street, New York NY 10001**. My phone number is **(444)-666-9111**.

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



Sell with an invoice

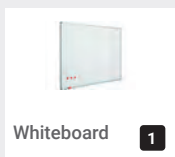
5

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

Create

Fill in the form with the customer information



Save



Payment




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

 Jennie Fletcher	 Invoice <input checked="" type="checkbox"/>		
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



Run a Store

Return 1 office lamp

6



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 / Units

\$ -46.00

1 Gift Card
[Sell physical gift card?](#)

\$ 46.00

Total: \$ 0.00



Run a Store

Control cash

7

You



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



Dave • Showroom Salesman

I'm on it!





- 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.



Run a Store

Analyze the POS sales

8



Anita • Accountant

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

You



Difficult to say, I'll check the [Sales Details](#).

Sales Details		
Selected date or date range: 10/10/2020		
Products		
Product	Quantity	Amount
ITEM1234567890	100	1000
ITEM9876543210	50	500
ITEM0987654321	25	250
Payments		
Total		1750
Cash		1000
Taxes		
Item	Percentage	Item Amount
Sales Tax	10%	175



Analyze the POS sales

8

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.



Sell Online

Design your homepage

1

You



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

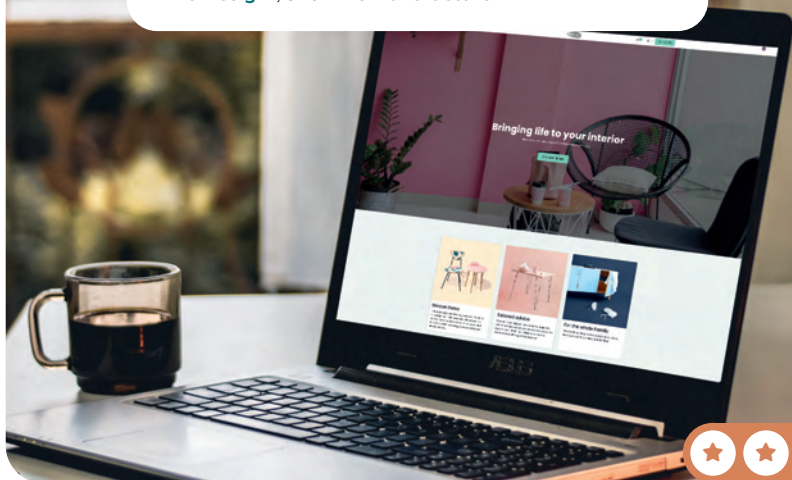


Sophia • Sales Manager

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

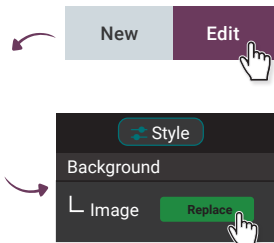
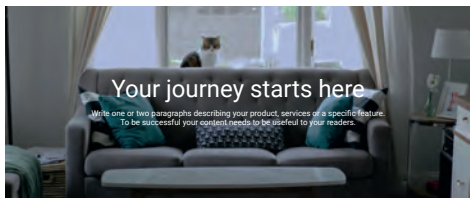
I would add some content with key numbers like **700+ happy customers**, **120+ designed products**, and **15 countries delivered to**. I would love to see a **gradient** in the background of this block.

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



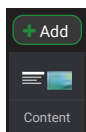
Design your homepage

1



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

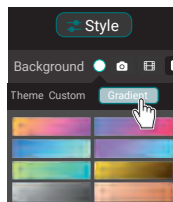
Search an image



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.

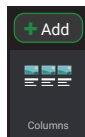
12k	45 %	8+
Useful options	More leads	Amazing pages



You Customized
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.



Save



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

Published



New

Edit



Sell Online

Create a product page

2



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.



Create a product page

2



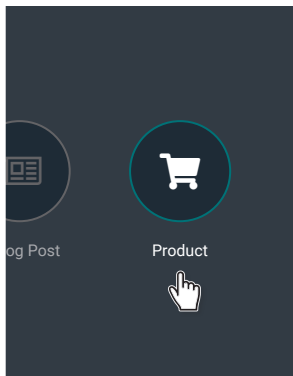
Website

Published



New

Edit



New Product



Product Name:

Sales Price

Sales taxes

Save

All Products / Office Chair



Normal 16 | **B** *I* U **S** | % | A | : |

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



ADD TO CART

Main Image

Replace

Extra Media

Add

Remove all



Sell Online

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?

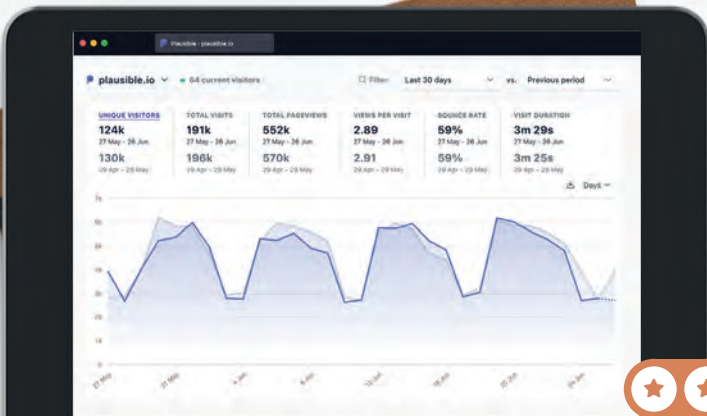
You



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**.



Sell Online

Add product variants

4



Sophia • Sales Manager

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

You



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

What are the options?



Sophia • Sales Manager

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)**.



Add product variants

4



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



Sell Online

Test your eCommerce

5

You

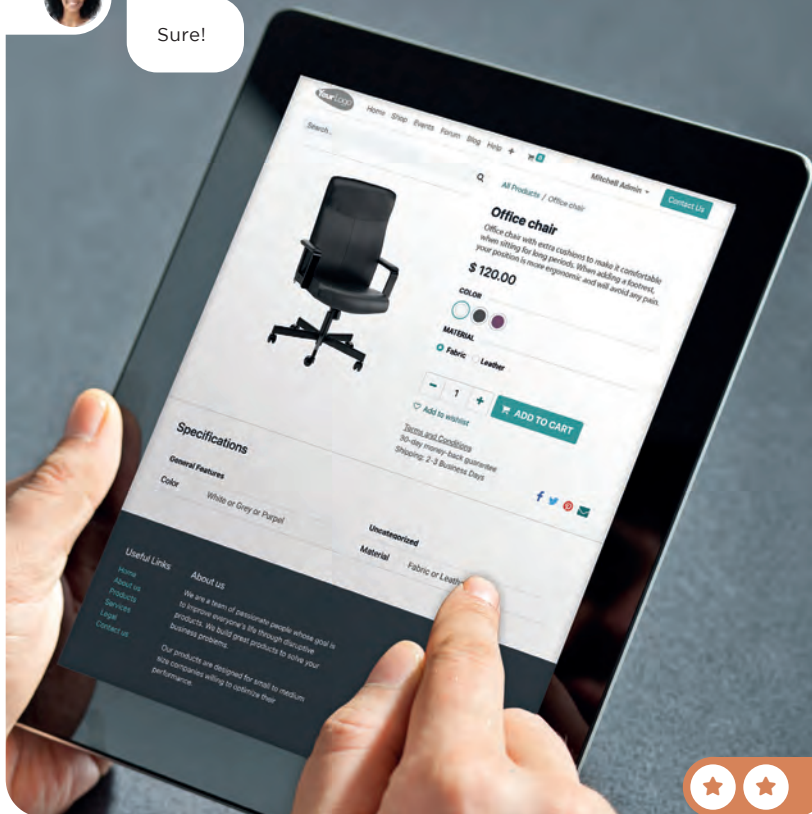


Our eCommerce is ready. Can you **test it by buying the purple chair** online?



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



Add to cart



Order > Address > Payment



Office Chair

Remove

\$ 120.00



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.).



Sell Online

Cross-sell to customers

6



Sophia • Sales Manager

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

You



Yes, let's **create a new product, "Warranty"**, that will be **suggested as an additional option for the chair**. The warranty will be valid **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 ✕

i

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

You can use this cross-selling strategy by suggesting accessories and optional products. You can also use upselling to suggest an alternative to the selected item, by adding an Alternative Product.



Sell Online

Write a blog post

7



Sophia • Sales Manager

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

You



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



Write a blog post

7



Website

New



Page



Blog Post



Product

New Blog Post



Select Blog

News




Title

Discover our 3-year warranty

Save



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

Home Shop News Contact us

Your Logo



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.



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



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



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.



Set up a project

1



Project

New

Create a Project



Name

Office Design



Timesheets

Log time on tasks



Billable

Invoice your time and material to customers

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.



Sell Services

Configure a product

2



Sophia • Sales Manager

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

You



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

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





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.



Schedule a meeting

4

You



You should have a new task for “The Jackson Group” under the Office Design project. Can you take care of the first interview?

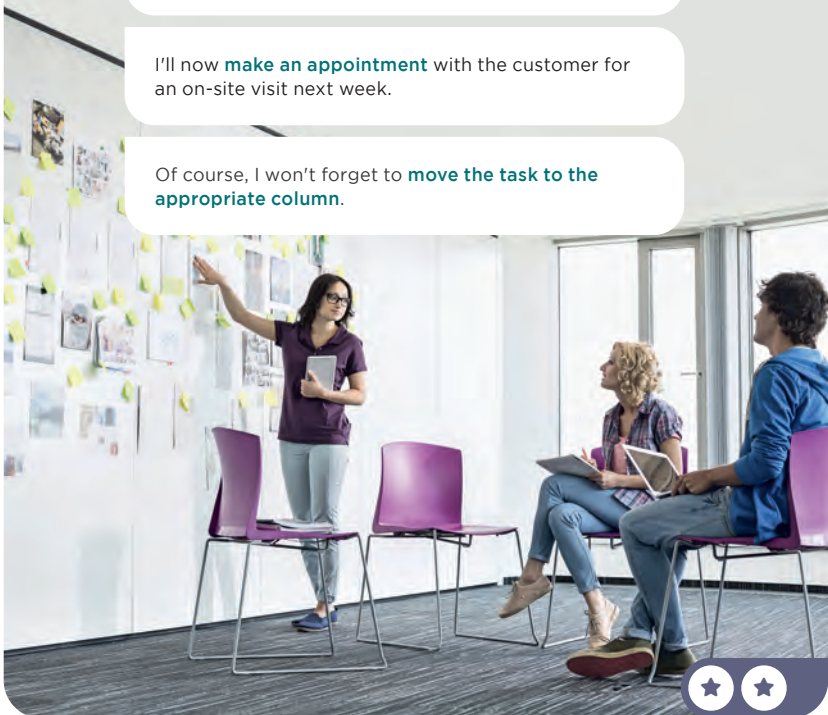


Audrey • Interior Designer

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**.



Schedule a meeting

4



Project

☆ Office Design

✉ design@myofficeinc.odoo.com

1 Tasks



Interview



1

S00002 - Office Design Service

The Jackson Group



20:00



Schedule activities to help you get things done.

+ Schedule an activity

Click on to mark as:

In progress

Changes requested

Approved

Cancelled

Done



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



Record timesheet



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 4

👤 20:00 ⭐⭐⭐

1 A

Today 1

On-site Visit ✓

A Audrey 2

▶ Done 3



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

+

Floor Plan

1

S00002 - Office Design Service

The Jackson Group

🕒 18:00 ⭐⭐⭐

A



Plan the work

6



Audrey • Interior Designer

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



S00002 - Office Design Service

The Jackson Group

🕒 18:00 ⭐☆☆



Description

Timesheets

Sub-tasks

Title

Assignees



Walls and floors



Audrey

[View](#)



Furniture



Audrey

[View](#)



Walls and floors

Project

Office Design

Customer

The Jackson Group

Assignees

Audrey

Deadline

In 2 weeks

Tags

Allocated Time

11:00 (0%)

C

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



Sell Services

Timesheet on subtasks

7

3 weeks later - You



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



Audrey • Interior Designer

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

Yesterday, we spent **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  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 

 Ernest

Painting

04:00



 Ernest

Working on the floor

05:00



 Ernest

Material

02:00



Add a line

i

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 

C

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



Invoice customer



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.

Number	Order Date	Customer	Total Invoice Status
500141	10/05/2023 14:49:09	Wood Center	\$ 1.00 To Invoice
500140	10/05/2023 14:47:45	Apore Interior	\$ 1.00 To Invoice
500139	10/05/2023 14:46:38	Devo Aeddi	\$ 1.00 To Invoice
500134	10/05/2023 14:05:04	YourCompany, Josef Mills	\$ 763.50 To Invoice
500134	10/05/2023 13:21:09	Apore Interior	\$ 590.00 To Invoice
500133	10/05/2023 13:20:03	Apore Interior	\$ 637.00 To Invoice
500132	10/05/2023 13:13:45	Servico Furniture	\$ 55.36 To Invoice
500131	10/05/2023 13:13:25	Wood Center	\$ 1.00 To Invoice
500130	10/05/2023 13:12:25	Wood Center	\$ 110.00 To Invoice
500149	10/05/2023 12:34:40	Devo Aeddi	\$ 17.50 To Invoice
500148	10/05/2023 12:30:46	Apore Interior	\$ 17.28 To Invoice



Invoice customer

8



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**.

- 1 **Define** the bill of materials
- 2 **Purchase** raw materials
- 3 **Receive** products
- 4 **Set up** operations & work centers
- 5 **Plan** a manufacturing order
- 6 **Add** a quality check
- 7 **Check** your quality test
- 8 **Control** cost



Install the apps



Apps



Manufacturing

Manufacturing Orders & BOMs



Install



Apps



Quality

Control the quality of your products



Install



Manufacturing

Configuration ▶ Settings

Operations



Work Orders ?

Process operations at specific work centers

Save



Define the bill of materials



Ronnie • Head of Engineering

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

You

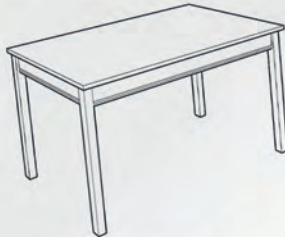


Looks good!

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

i

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

i

Product Table

BoM Type Manufacture this product

Quantity 1.00

Component

Quantity

Table Top 1.00

Table Leg 4.00

Bolt 4.00



Manufacture

Purchase raw materials

2

You

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

Only Woods Inc. • Sales Representative

Sure. Here is our offer.

You

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



Purchase raw materials

2



Purchase

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



Manufacture

Receive products

3



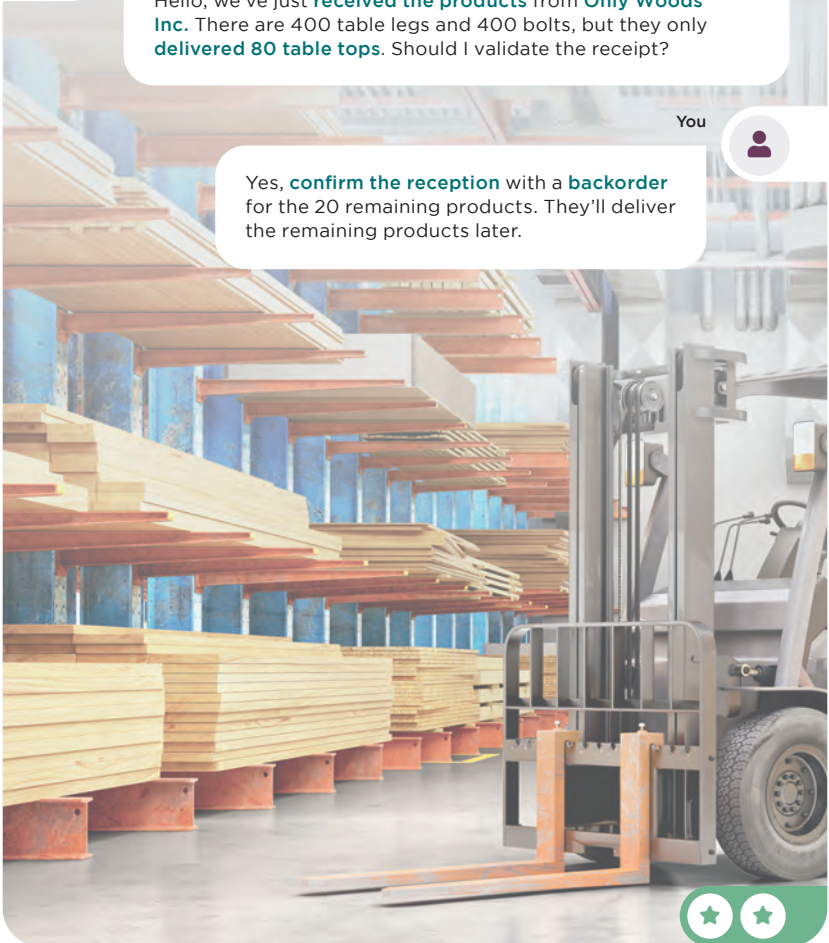
Randall • Inventory Officer

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





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

Table



BoM Type

Manufacture this product

Components

Operations

Miscellaneous

Operation

Add a line



Operation

Assembly

Work Center

Assembly Station



Save & Close

2

Cost per hour ? 12.5 per workcenter

1

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

5

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

5



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

Table

Confirmed

1 Units

Assembly Station Assembly

Close production

WH/MO/00001

Assembly Table

START

1 Units

Worksheet Table

i

✓

WH/MO/00001

Assembly Table

A

1 Units

Worksheet Table

i

✓

WH/MO/00001

Assembly Table

A

1 Units

Worksheet-Table

i

↺

Mark as Done

Painting Room 1

START

Close Production



Manufacture

Add a quality check

6



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

6



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 ?	<u>Table *</u> ▼	Type ?	Measure	▼
Operations	<u>MyOff.: Manufact. *</u> ▼	Norm	13.00	Nm
Work Order Operation	<u>Assembly</u> ▼	Tolerance	from <u>11.00</u> to <u>15.00</u>	



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



Check your quality test

7

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

7



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

Units

Worksheet Table

i

✓

2

Torque Setting Measurement

3

!

Measure

×

12.00

nm

Save

WH/MO/00002

Assembly
Table

A

1 Unit

Worksheet Table

i

↺

Torque Setting Measurement 12Nm

↔

Mark as Done

⋮

Painting Room 1

START

Close Production



Manufacture

Control cost

8



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.





- 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

1



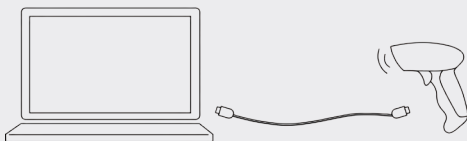
If you don't have a barcode scanner, you can use your smartphone (see instructions on the front of the introduction card).

Note that you'll need to authorize 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.



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.



Use Barcodes

Set up your product

2

You



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

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



Sharlene • Manufacturing Engineer

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



Set up your product

2



Inventory

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



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



Use Barcodes

Receive products

3



Incoming Call...

Hello, I'm the driver from Wood Corner.

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

You



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



Receive products

3




Barcode

1 Initiate a receipt.



WHIN



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

2 Scan the product, 3 times.



DESK12345678



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

+1

3 Validate the transaction.



OBTVALI



Use Barcodes

Sell products

4



Brandon • Customer

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

You



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



Brandon • Customer

That's correct!



Sell products

4



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



Use Barcodes

Deliver products

5



Sophia • Sales Manager

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

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





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.



Use Barcodes

Adjust inventory

6



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

6



Barcode

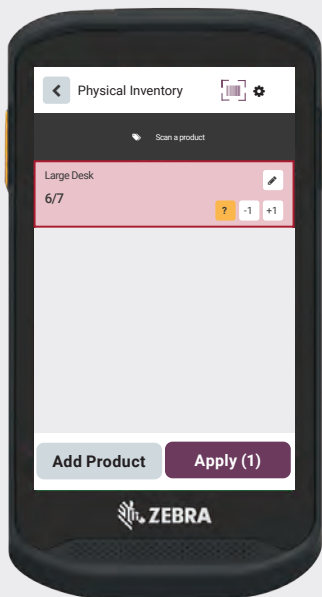


Count Inventory

1 Scan 3 times



DESK12345678



2 Validate the inventory



OBTVALI



Use Barcodes

Define locations

7



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

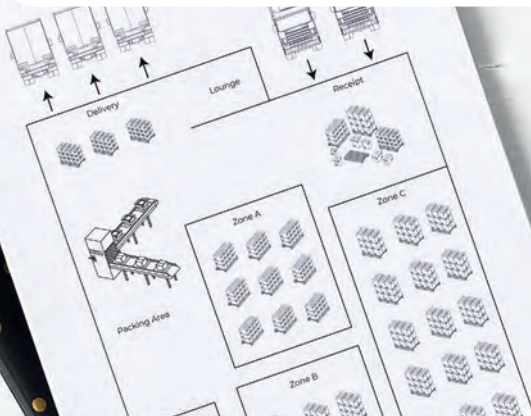


I am going to do an ABC inventory analysis. Frequently sold products should go in Zone A, closer to the packing zone. Less frequently sold products should go in Zone C, at the end of the warehouse. Can you **activate the storage location** feature in the **Settings**?



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**.



Define locations

7



Inventory

Configuration ▶ Settings

Warehouse



Storage Locations

Track product location in your warehouse

Save



Inventory

Configuration ▶ Locations

New

ZoneA

Parent Location

WH/Stock



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

Location Type ? Internal Location

Barcode ZONEA



Repeat this operation to create the 2 other locations:

ZoneB • Internal Location • ZONEB

ZoneC • Internal Location • ZONEC



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



Use Barcodes

Move products

8

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.





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...



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).



Manage your Team

Create a job description

1



Eli • Marketing Manager

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

You



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



Eli • Marketing Manager

Of course, here are the skills we need:

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

You



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



Create a job description

1



Recruitment

New

Create a Job Position ×

Job Position Marketing 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 ?



Manage your Team

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

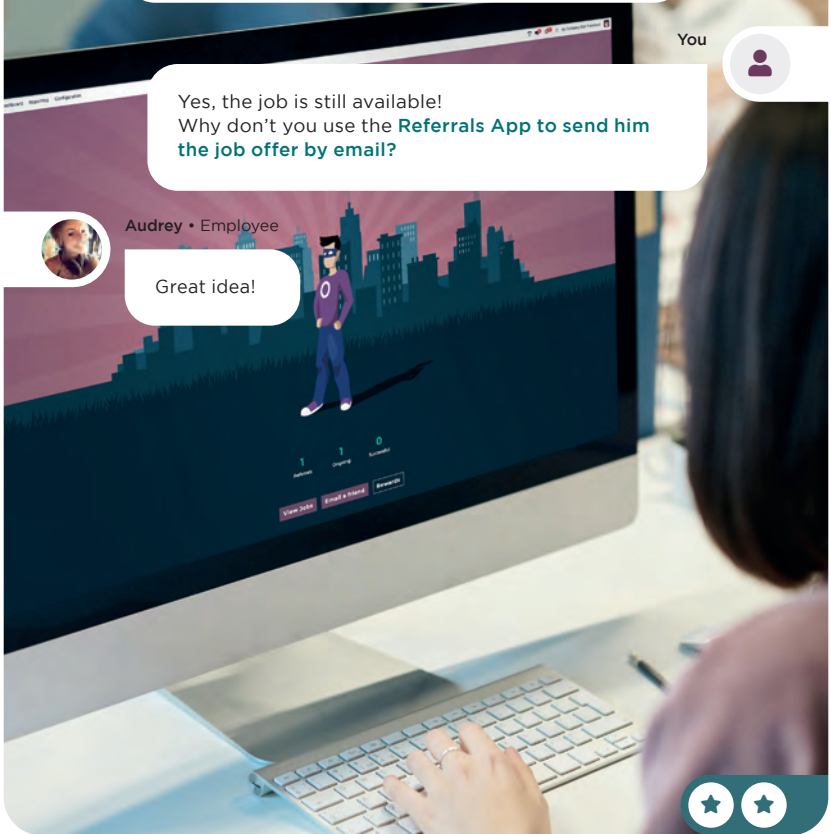


Yes, the job is still available!
Why don't you use the **Referrals App** to send him the job offer by email?



Audrey • Employee

Great idea!





Referrals

Next >

Start Now

View Jobs

Marketing Community Officer

100 Points

1 Open Position

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.



Manage your Team

Make an offer

3



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?



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?



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

3



Recruitment



Marketing Community Officer



Administrator

1

to recruit

1

new applications

1

in progress



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



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



Manage your Team

Add the employee

4



Eli • Marketing Manager

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

You



Yes! I'll **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



Add the employee

4



Recruitment



Marketing Community Officer



Administrator

1 to recruit

0 new applications

1 in progress

Jeffrey Kelly

Marketing Community Officer



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



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.



Manage your Team

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

5



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



Manage your Team

Schedule your time off

6



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.

June

Mo Tu We Th FR Sa Su

Mo	Tu	We	Th	FR	Sa	Su
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	



Schedule your time off

6



Time Off

Management ▶ Allocations

New

Paid Time Off

Time Off Type Paid Time Off Employee **J** 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 **J** 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



Manage your Team

Submit an expense

7



Eli • Marketing Manager

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

You



Ok Eli, now that we have a nice business management software, you can use the **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**.



Submit an expense

7



Expenses

New

Description

Welcome Lunch for Jeffrey

Category [FOOD] Meals

Total \$102.55

Employee  Eli Lambert

Paid By Employee (to reimburse)
 Company

Manager  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.

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



Digitalize Accounting

Download and import vendor bills

1



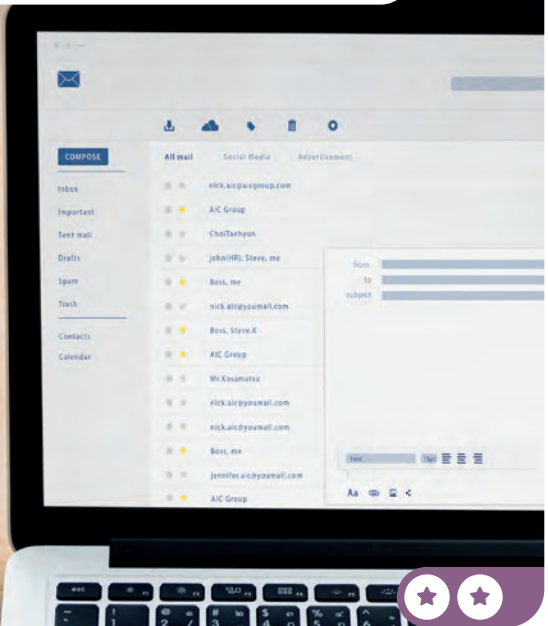
Paul • Secretary

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**.



Download and import bills

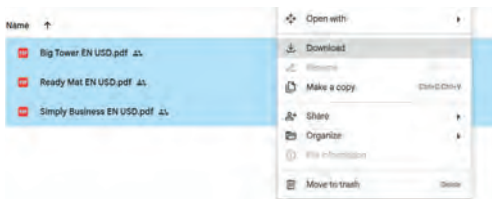
1



Accounting



Don't forget to unzip them if you've downloaded a .zip file.



Accounting

Vendors ▶ Bills

Upload



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



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

<input type="checkbox"/>	Number	Vendor	...	Due Date	Status
<input type="checkbox"/>	/	Simply Business		4 days ago	Draft



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

2



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.

i

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



Digitalize Accounting

Connect your bank

3

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

3

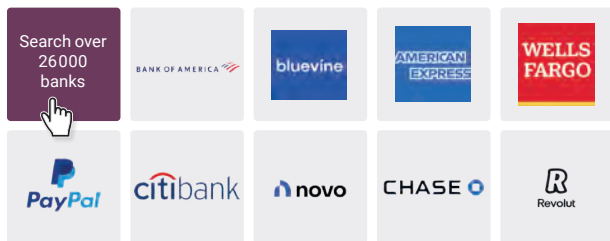


Accounting

Dashboard

Bank

Connect your bank. Match invoices automatically.



Add a Bank Account

Q Odoo bank

odoo 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



Digitalize Accounting

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.**



Perform bank reconciliation

4



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



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



2

1



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



Digitalize Accounting

Analyze the partner ledger 5

You



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

Anita • Accountant



Of course, let me check the [Partner Ledger report](#).



Analyze the partner ledger

5



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.



Digitalize Accounting

Analyze the profit and loss statement 6

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 Income Statement

A summary of the company's earnings and expenses for the period.

— FY Q4

SOCIAL MEDIA REPORT

02

ABOUT DIGITAL PROMOTIONAL



Analyze the profit and loss statement 6



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

7

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!



Generate the tax report

7



Accounting

Reporting ▶ Tax Report

i

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.

i

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.

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



Install the app



Apps



CRM

Track leads and close opportunities



Install



Close new deals

Import ongoing leads

1

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.



Import ongoing leads

1



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

Mike G.



Contact



Email

Mikeg@mailinator.com



Email



Notes

Mike G. was very interested...



Notes



Test

No matching 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



Close new deals

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



Close new deals

Create a new opportunity

3



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!**





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

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.



Close new deals

Send a quotation

4

You



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



Send a quotation

4



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



Close new deals

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



Provide a discount

5



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



Close new deals

Organize your CRM

6



Sophia • Sales Manager

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

The screenshot shows a CRM pipeline view. At the top, a stage named "Waiting for Feedback" is highlighted with a grey bar. To its left is a plus sign and the number "79,100". To its right is another plus sign and the number "0". Below this stage, a card for "Kary M.'s opportunity" is visible. The card contains the text "\$ 1,320.00" and "Kary M.". At the bottom of the card are three yellow stars and a circular icon with a downward arrow. A small profile picture of a man with glasses is visible in the bottom right corner of the card.

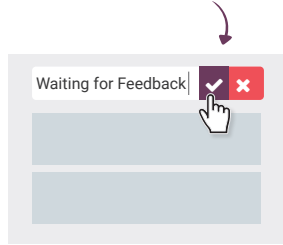


Organize your CRM

6



CRM



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

Proposition

Waiting for Feedback

1

Kary M.'s opportunity

\$ 1,320.00
Kary M.



Close new deals

Close the deal

7

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.



Won



Proposition

Waiting for Feedback

Won



Quotations

1

Confirm



Delivery

1



Scheduled Date in 2 weeks



Close new deals

Analyze expected revenue

8



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.



Analyze expected revenue

8



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 x

Studio



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



Create your App

Initialize your app

1



Sophia • Sales Manager

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

You



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



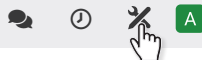
Sophia • Sales Manager

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



Initialize your app

1



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 >



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**).



VIEWS > FORM

+ Add

New Fields

Field 1

Field 2

N° Integer

Ab Text

Field 5

Field 6

Field 7

Selection

Field 9

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



Create your App

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



Record your offices

3

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



Create your App

Manage rental status

4



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

4



Edit Menu + New Model Close

Webhooks Access Control Filter Rules

Add a pipeline status bar

Field Properties

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

Confirm



New Offices
Crashide ⚙

- Name
 - Merriman
 - Chestnut
-

Available Leased To renew



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



Create your App

Add a kanban view

5



Sophia • Sales Manager

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

You



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



Add a kanban view

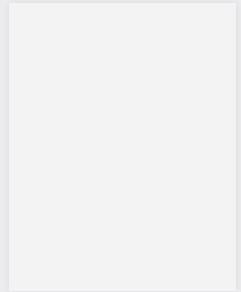
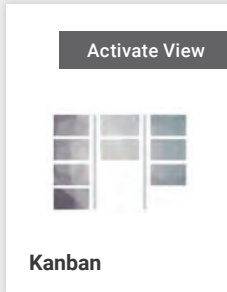
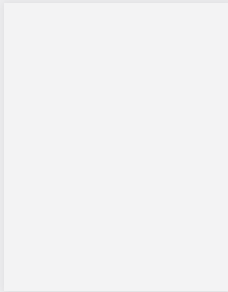
5

Office Rental Offices



Views

Multiple records views



View

Available (2)

Merriman

Default Group by

Pipeline status bar  

Close



Create your App

Automate an activity

6

You

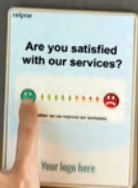
How do you make sure our clients are happy?

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**.



Automate an activity

6

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:

2

Pipeline status bar is e... Leased

+ Add condition

When updating ?

Pipeline status bar x

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



Create your App

Improve the list view

7



Sophia • Sales Manager

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

You



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



Improve the list view

7

Office Rental Offices



Existing Fields ▾



Type

N°

Capacity



Pipeline
status bar

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

Close

i

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



Create your App

Create statistic reports

8

You



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

Sophia • Sales Manager

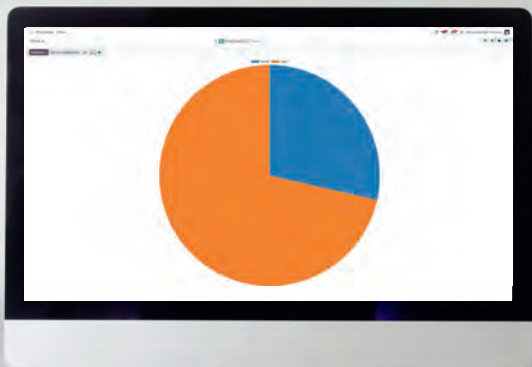


Why don't you **create a graph view**?

You



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



keep it simple.



Create statistic reports

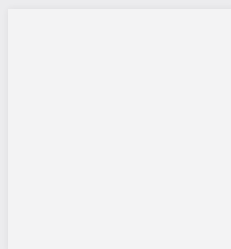
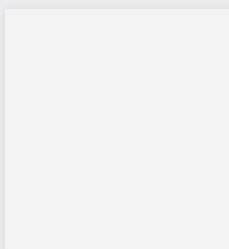
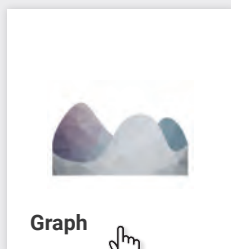
8

Office Rental Offices



Views

Reporting Views



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".

