Discover 5 new business cases and learn more about business management!

Want to Play more? Get the full version on: www.odoo.com/scaleup

Launch a point of sale for consumers
Manufacture your own products
Manage your inventory with barcodes
Sell online with an eCommerce website
Lease fully-furnished properties

The Business Game odoo
This version is adapted for Odoo 16.

Scale-Up! The Business Game is a game published by Odoo S.A. under Creative Commons license BY-NC-SA.

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More information on : odoo.com/scaleup
“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.

Paul helps you find an affordable office location. Now, it’s time to start doing business; purchase your first products, market your company, sell those products and, hopefully, make a profit!

The first game, “Buy & Sell”, will help you setup your B2B business: from buying new products to selling and delivering to customers. Once these processes are in place, you’ll be able to choose from 6 other scenarios to develop your strategy:

- Launch a point of sale for consumers
- Offer extra services
- Manufacture your own products
- Manage your inventory with barcodes
- Sell online with an eCommerce website
- Lease fully-furnished properties

Good luck with your new business!
The game has 7 business cases each with 8-10 cards. Start with the game “Buy & Sell”, then play the others according to your strategy. For each card, follow these 3 steps:

1. Read the business case on the front of the card. Don’t look at the back yet!

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

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

Your Score

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

<table>
<thead>
<tr>
<th>16+</th>
<th>14-15</th>
<th>12-13</th>
<th>10-11</th>
<th>7-9</th>
</tr>
</thead>
<tbody>
<tr>
<td>🏆🏆🏆🏆</td>
<td>🏆🏆🏆</td>
<td>🏆🏆</td>
<td>🏆</td>
<td>🏆</td>
</tr>
</tbody>
</table>
You are the CEO of MyOffice Inc., a modern furniture retailer. To help your business grow, you have decided to setup an integrated management software.

Create your company’s database on www.odoo.com through the "Start Now" button and select the Apps required for the following business flow:

| 1 | Create a Product                        |
| 2 | Purchase Large Desks                    |
| 3 | Receive Products                        |
| 4 | Control the Bill                        |
| 5 | Sell Products                           |
| 6 | Deliver to Customer                     |
| 7 | Invoice Customer                        |
| 8 | Record Payment                          |
| 9 | Analyze Profits                         |
Your own country should be selected by default. The country defines the right taxes, charts of accounts and legal reports.

Once finished, you will receive an email to confirm your database and validate your password.

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 right taxes, charts of accounts and legal reports.

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

Configure

Company Name
MyOffice Inc.
edu-myoffice-inc.odoo.com

Country
United States

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

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

Sounds good, I’ll create the product in our catalog.
**Create a Product**

<table>
<thead>
<tr>
<th>Vendor</th>
<th>Quantity</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wood Corner</td>
<td>10.00</td>
<td>100.00</td>
</tr>
<tr>
<td>Wood Corner</td>
<td>1.00</td>
<td>140.00</td>
</tr>
</tbody>
</table>

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

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

With Quantity set at 10 in the first line, the system uses the matching price when creating a purchase order over 10 items.
You: Sophia, I plan to purchase Large Desks. What are your monthly sales estimates?

Sophia: Between 9 and 12.

You: Ok, I'll purchase 10 desks to start with.
<table>
<thead>
<tr>
<th>Product</th>
<th>Quantity</th>
<th>Unit Price</th>
<th>Taxes</th>
<th>Subtotal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Large Desk</td>
<td>10,000</td>
<td>100,000</td>
<td>15.00%</td>
<td>$1,000.00</td>
</tr>
</tbody>
</table>

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

Optionally, you can send it by email.

SEND BY EMAIL  RFQ  RFQ SENT  PURCHASE ORDER

CONFIRM ORDER  RFQ  RFQ SENT  PURCHASE ORDER

This button takes you directly to the Receipt document.
Ok, go to dock 3. I’ll validate the receipt.
### Receipts

<table>
<thead>
<tr>
<th>Reference</th>
<th>Contact</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>WH/IN/00001</td>
<td>Wood Corner</td>
<td>Ready</td>
</tr>
</tbody>
</table>

**WH/IN/00001**

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

<table>
<thead>
<tr>
<th>Operations</th>
<th>Additional Info</th>
<th>Note</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Product**  
**Demand**: 10.000  
**Done**: 10.00

If you don't set any quantity received in the 'Done' column, Odoo asks for a confirmation to accept all the entire demand of ordered quantities.
Hi! Today, we’ve received a bill from the vendor.

I’ve put it on your desk, can you create, check and validate it? No need to pay it right now, the due date is in 2 months.
Hello, on your invoice 2022/0123, you charged us $110 per unit instead of the $100 we agreed upon. We accept the bill, but we won't pay it until you send us a $100 refund receipt.

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

Hello, on invoice 2022/0123, you charged us $110 per unit instead of the $100 we agreed upon. We accept the bill, but we won't pay it until you send us a $100 refund receipt.
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’ll get it by email right now!
<table>
<thead>
<tr>
<th>Product</th>
<th>Quantity</th>
<th>Unit Price</th>
<th>Taxes</th>
<th>Subtotal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Large Desk</td>
<td>3.00</td>
<td>220.00</td>
<td>15.00%</td>
<td>$660.00</td>
</tr>
</tbody>
</table>

Clicking on the image gives you details about the stock.

Wait 30 seconds, you should receive a confirmation email in your inbox if you sent the email to brandon@game.odoo.com. Click CONFIRM.

This button takes you directly to the Delivery Order.
Hi, Brandon from Azure Interior speaking.

You'll get it by email right now!

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

Immediate Transfer? You have not recorded done under quantities yet, by clicking on apply Odoo will process all the quantities.

Validate
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!
<table>
<thead>
<tr>
<th>Number</th>
<th>Customer</th>
<th>Total</th>
<th>Invoice Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>S00001</td>
<td>Azure Interior, Brandon</td>
<td>$759.00</td>
<td>To invoice</td>
</tr>
</tbody>
</table>

**Create Invoice**

- **Regular invoice**

The other options “Down payment” allow you to invoice only a part of the invoice (i.e. 20% or 500€).

**Product** | **Quantity** | **Price** | **Taxes** | **Subtotal** |
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Large Desk</td>
<td>3.00</td>
<td>220.00</td>
<td><img src="Image" alt="Tax 15.00%" /></td>
<td>$660.00</td>
</tr>
</tbody>
</table>

- **Untaxed amount:** $660.00
- **Tax 15%:** $99.00
- **Total:** $759.00
Let’s register this payment in the invoice.
Instead of recording payments manually, you can synchronize your bank with Odoo (it supports integration with 35,000 banks), or import bank statement files. Reconciliation becomes much faster as matches are suggested automatically.

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

Instead of recording payments manually, you can synchronize your bank with Odoo (it supports integration with 35,000 banks), or import bank statement files. Reconciliation becomes much faster as matches are suggested automatically.
Can you tell me the net profit of this year? I need it for a board meeting tomorrow.

Let me check the Profit & Loss report.
Depending on your national principles for accounting (Continental or Anglo-Saxon), you should have a net profit of -€340 or +$660. In Continental accounting, the expense is recorded at the time of the purchase. While in Anglo-Saxon accounting, the expense is recorded once the goods are sold (in the Cost of Revenue account).
Run a Store

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

Install the Point of Sale app.

Import Products

Configure Cash Control

Sell 3 LED Lamps

Cash Out Money

Sell with an Invoice

Return 1 LED Lamp

Control Cash

Analyze the PoS Sales
Run a Store

Apps

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

INSTALL

Info-Circle

In the application Point of Sale > Configuration > Payment Methods, you can add other payment methods, such as credit cards.
Sure, no problem, here's the document with all product accessories information: [www.odoo.com/r/pos-products](http://www.odoo.com/r/pos-products)

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

Great, I'll import this file directly into the system!
Import your Products

Point of Sale

Product ▶ Products

Favorites

UPLOAD FILE

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

Imported file

- POS_Products
- Use first row as header

File Column | Odoo Field
--- | ---
External ID | ID Externe
Name | Name

Desks

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

Categories can help you find products faster thanks to the top navigation bar on the POS interface.
Anita, I’m opening the shop. I’ll need some cash for the Opening balance. Do you have some?

Sure. I can give you $550.

Great! I’m opening a new session with this.
The Notes field allows you to add extra information. Any notes created will reappear at the closing of a Point of Sale session.

You can use the icon to avoid calculating the amount available. Simply add the number of banknotes and coins you have for each value.
Mike • Customer

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

You

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

Mike • Customer

Great! I'll pay in cash. Here is $600.
## Sell 3 LED Lamps

<table>
<thead>
<tr>
<th>LED Lamp</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>LED Lamp</td>
<td>$320.00</td>
</tr>
<tr>
<td>LED Lamp</td>
<td>$200.00</td>
</tr>
</tbody>
</table>

### LED Lamp Details
- **Price**: $320.00
- **Quantity**: 2.00 Unit(s) at $200.00 / Unit
- **Discount**: 20%

### LED Lamp Details
- **Price**: $200.00
- **Quantity**: 1.00 Unit(s) at $200.00 / Unit

---

### Total: $598.00
- **Taxes**: $78.00

---

### Payment

![Payment Screen](image)

- **Cash**: 600.00

---

### Additional Information
- **Info-Circle**: If your database's country has higher tax rates, the cash amount that you'll have to input will be over 600.
- **Info-Circle**: You can also add products in the POS by scanning the barcode.
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?

Ok, I’ll come right away with the money!
You can continue selling even if you are disconnected from the internet. The system keeps all sales in memory and syncs them once it gets back online.

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

Cash Out Money

Cash in/out

Cash In  Cash Out  -12 $

Sandwiches Anita

Confirm

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

You can continue selling even if you are disconnected from the internet. The system keeps all sales in memory and syncs them once it gets back online.
Hi, I'll take this whiteboard. Is it possible to get an invoice?

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

Yes, my name is Jennie Fletcher, 3202 Hannah Street, Asheville NC 28801. My phone number is (443)-648-9155.

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

Create

Customer

Jennie Fletcher

Street: 3202 Hannah Street
City: Asheville
Postcode: 28801
State: North Carolina
Country: United States
Email: jennie@example.com
Phone: (443)-648-9155

Save

Payment

Whiteboard

$100.00

Cash

Cash: 200.00

Validate »

If you click on 'Print Receipt' the invoice is printed (or by default, downloaded).

Change $85.00
Hi, I came this morning and bought 3 LED Lamps. But actually, I don't need this one. Can I return it?

Sure, no problem!
## Return $230.00 for 1 LED Lamp

### Receipt Details

<table>
<thead>
<tr>
<th>Receipt Number</th>
<th>Total</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Order 00001-001-0002</td>
<td>$115.00</td>
<td>Paid</td>
</tr>
<tr>
<td>Order 00001-001-0001</td>
<td>$598.00</td>
<td>Paid</td>
</tr>
</tbody>
</table>

### Item Details

**LED Lamp**

- 1,00 Unité(s) à 200,00 € / Unité(s)
- Total: $230.00

### Payment Details

- **Cash**: $-230.00

### Refund

- **Refund** button

### Validate

- **Validate** button
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.

I’m on it!!
You started this session with $550. Then you sold 3 lamps and the white board ($598 + $115), helped Anita out ($-12) and refunded one lamp ($-230). You should have a total of $1,021.00
Figures might change depending on the taxes in your country.
Anita • Accountant

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

You

Difficult to say, I’ll check the Sales Details.
## Analyze the PoS sales

### Sales Details

<table>
<thead>
<tr>
<th>Start Date</th>
<th>Yesterday's date</th>
</tr>
</thead>
<tbody>
<tr>
<td>End Date</td>
<td>Today's date</td>
</tr>
</tbody>
</table>

### Products

<table>
<thead>
<tr>
<th>Products</th>
<th>Quantity</th>
<th>Price Unit</th>
</tr>
</thead>
<tbody>
<tr>
<td>[FURN_0003] LED Lamp</td>
<td>0.0</td>
<td>200.0</td>
</tr>
<tr>
<td>[FURN_0003] LED Lamp</td>
<td>2.0</td>
<td>200.0 Disc: 20%</td>
</tr>
<tr>
<td>[FURN_009] Whiteboard</td>
<td>1.0</td>
<td>100.0</td>
</tr>
</tbody>
</table>

### Payments

<table>
<thead>
<tr>
<th>Name</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash</td>
<td>483.00</td>
</tr>
</tbody>
</table>

### Taxes

<table>
<thead>
<tr>
<th>Name</th>
<th>Tax Amount</th>
<th>Base Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tax 15.00%</td>
<td>63.00</td>
<td>420.00</td>
</tr>
</tbody>
</table>

**Total: 483.00**
Locally, the MyOffice brand is recognized for its quality and service. It’s time to go global and establish a web presence to showcase your great products. You plan to setup 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
- **Create** a Product
- **Improve** SEO
- **Set up** a Product Configurator
- **Test** your eCommerce
- **Upsell** Customers
- **Write** a Blog Post
Sell Online

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

Build my website

Select your favorite theme.
I’m launching our new website. Any idea what we should put on our homepage?

Sophia • Sales Manager

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

I would put some key numbers like: 700+ happy customers, 35 employees, 120+ designed products, and 4 year guarantee.

Then, we can add 3 columns: “You Customize”, “We Design”, and “We Manufacture”.

Sell Online
Design your Homepage
When searching for an image, Odoo suggests illustrations and pictures free of charge.

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

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

You

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

New Product

Product Name: Office Chair

Create

1. Upload an image
2. Set the price $120.00

Save

All Products > Office Chair

Office Chair

$120.00

Add to Cart
Hi, there have been no sales for our new office chairs online. Can we do some **Search Engine Optimization (SEO)**?

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

Office Chair On Sale | MyOffice Inc.

**Custom URL**

/shop/ office-chair

**Keywords**

office chair

**Keyword**

H1 H2 T D C Related keywords

office chair

office chairs near me

office chairs on sale

Most "office chair" searches on Google are related to "Office Chair On Sale". By narrowing your target to these keywords, you should attract more visitors.

Try to target the same keywords as the title of your page, the URL and the product name. If you change the product name, the URL is updated accordingly, but you can choose to keep the initial product name in the URL thanks to the “Custom Url” feature.

**Bonus Point**

Check if your product is published in the top-right corner, otherwise, visitors can not access the page. You get an extra 🌟 if you thought about publishing it.
Sophia • Sales Manager

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

You

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

What are the options?

Sophia • Sales Manager

They come in 4 colors (grey, black, white, purple), and 3 sizes (Small, Medium, Large). We can also offer a custom embroidery, with their name on it.
Set up a Product Configurator

Product Catalog

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

Office Chair

General Information

Attributes & Variants

Attribute
Values

Size
- Small
- Medium
- Large

Color
- Grey
- White
- Black
- Purple

Embroidery
- Custom
- No embroidery

Attribute Name
Color
Display Type
- Color

Attribute Name
Embroidery
Display Type
- Select
- Never (option)

Variants Creation Mode
- Never (option)

Attribute Values
- No embroidery
- Custom

Settings
Configuration
Sales

No embroidery

SAVE
Sell Online

**Test your eCommerce**

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

Sophia • Sales Manager

Sure!

---

**Office Chair**

- **Size:**
  - Small
  - Medium
  - Large

- **Color:**
  - [ ]

- **Embroidery:**
  - No Embroidery

- **Price:** $120.00

- **Add to Cart**

Terms and 30-day money-back guarantee.
By default, only the “Wire Transfer” payment method is activated. Don’t forget to edit your bank account information using 🖋️. You can also activate Paypal, or any credit card, by configuring one of the available payment acquirers (Stripe, Authorize.net, Ingenico, etc.)
Sophia • Sales Manager

Last month, we made $350k in revenue through the website, with an average cart size of $250. Can we upsell customers by proposing options?

Yes, let’s create a new product “Warranty” that will be as an option for the chair. The warranty will be valid for 3 years and cost $50.
Warranty: 3 years

<table>
<thead>
<tr>
<th>General Information</th>
<th>Variants</th>
<th>Sales</th>
<th>eCommerce</th>
</tr>
</thead>
<tbody>
<tr>
<td>Product Type</td>
<td>Service</td>
<td>Sales Price</td>
<td>$50</td>
</tr>
</tbody>
</table>

Products / Warranty: 3 years

You can reach the previous screen by using the breadcrumb. It works better than using your browsers' back and forward arrows.

Office Chair
Price: $120.00

Optional Products
Warranty: 3 years

Once the product is set up, test it by adding a chair to your cart. You should see a popup offering you the option for a warranty. You can use this mechanism to do a multi-level product configuration, as the optional product (the warranty) can have options and variants too.
I love the new warranty service. It would be great to write a news article about it.

Ok, I'll setup a blog on our website and write the first post.
To set a cover for your blog, click on the title then click on the camera icon next to the “Background” option.
Sell Services

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

Install the Apps required for the following business flow and configure your own email servers in the General settings.

Set up a Project
Create a Task
Perform the Job
Configure a Product
Sell the Design Service
Record Timesheet
Invoice Customer
Install the Apps

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

<table>
<thead>
<tr>
<th>Module Name</th>
<th>Author</th>
<th>Website</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project</td>
<td>Odoo S.A.</td>
<td><a href="https://www.odoo.com/app/project">https://www.odoo.com/app/project</a></td>
</tr>
<tr>
<td>Timesheets</td>
<td>Odoo S.A.</td>
<td><a href="https://www.odoo.com/app/timesheet">https://www.odoo.com/app/timesheet</a></td>
</tr>
</tbody>
</table>

Discuss

Custom Email Servers
Configure your own email servers

Alias Domain @mycompany.com

SAVE
It starts with an on-site meeting to check their office and gather info, then I prepare 3 design proposals. Based on their feedback, I model a floor plan, then a sales rep creates the quotation with the new products.

I’ll create the project “Office Design” to structure our services. What are the steps involved in designing an office?

Sell Services
Set up a Project

Audrey • Interior Designer

Ok thanks. I’ll create the stages and set the email address “design@” on the project, to ease the creation of tasks.
Set up a Project

- **Project Name**: Office Design
- **Timesheets**: ✔
- **Create tasks by sending an email to**: design@myoffice.odoo.com

If you send an email to the above email address, a task will be created automatically in this project.

- **Meeting**: 0
- **Design**: 0
- **Floor Plan**: 0
- **Quotation**: 0

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

Create a Task

Sophia • Sales Manager

Boogle asked us to design their new office in New York.

You

Send an email to “design@yourdomainname.odoo.com” with subject “Boogle NY” to create a task for Audrey.
From your personal Inbox

When sending an email to the project, you can attach photos or provide a description. These will automatically be attached to the new task.

You’ll find your domain name in the navigation bar of your browser.

https://yourdomainname.odoo.com/web

When sending an email to the project, you can attach photos or provide a description. These will automatically be attached to the new task.
Audrey, you should have a new task for “Boogle NY” under the Office Design project. Can you prioritize it?

You

Ok, I’ll star the task for priority.

I will be scheduling a meeting with the customer next week. Once my meeting is done, I’ll work on the design proposal.
Perform the Job

**Office Design**

Email: design@myoffice-inc.odoo.com

1 Tasks

Meeting

Boogle NY

Click on 🟢 to mark the task as:
- Ready for the Next Stage
- Blocked

Schedule activities to help you get things done.

+ SCHEDULE AN ACTIVITY

<table>
<thead>
<tr>
<th>Activity Type</th>
<th>Summary</th>
</tr>
</thead>
<tbody>
<tr>
<td>Meeting</td>
<td>Visit Boogle's Office</td>
</tr>
</tbody>
</table>

Open Calendar
Sophia • Sales Manager

I think it’s a mistake to offer our Office Design service for free. If we sell it, customers will better understand the value of Audrey’s work.

You

You’re right. We can sell this service at $50 per hour.

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

- **Product Type**: Service
- **Sales Price**: $50

**General Information**

- Can be Sold
- **Can be Purchased**

**Invoicing policy**: Based on Timesheets

**Create on Order**: Task

**Project**: Office Design

**Unit of Measure**: Hours

---

**Bonus Point**: You could have set Project & Task or Project in Create on Order. Both are valid options. But you get an extra star if you chose Task. It’s more efficient to manage all tasks in the same project as you only have one task per customer to track.
Sophia • Sales Manager

I just confirmed our first quotation for “The Jackson Group”.

We sold an Office Design Service, estimated at 20 hours. The customer loved it and confirmed the order right away!

Awesome! Check that the task has been created automatically for Audrey.
The Jackson Group

<table>
<thead>
<tr>
<th>Product</th>
<th>Qty</th>
<th>Unit Price</th>
<th>Taxes</th>
<th>Subtotal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Office Design Service</td>
<td>20.000</td>
<td>50.00</td>
<td>15%</td>
<td>$1,000.00</td>
</tr>
</tbody>
</table>

**Untaxed Amount:** $1,000.00  
**Tax 15%:** $150.00  
**Total:** $1,150.00

Links to the Project (and to the task) have been included on the sales order, in the top right corner.
Audrey, as we charge customers based on hours spent, don’t forget to record your timesheet on tasks with the “Start” button.

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

Ok, I’ve just started to work on the design for The Jackson Group. I’ll log the time spent.
There are many ways to record timesheets: directly from the task, via the mobile app: “Awesome Timesheet” or via the “Start” button at the top of the grid. All methods provide the same result.

By default, time is rounded up by the quarter. You can change this in the Settings menu.
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 it and **validate** it.
### Create Invoice

**Regular invoice**

<table>
<thead>
<tr>
<th>Product</th>
<th>Quantity</th>
<th>Price</th>
<th>Taxes</th>
<th>Subtotal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Office Design Service</td>
<td>0.50</td>
<td>50.00</td>
<td>15.00%</td>
<td>$25.00</td>
</tr>
</tbody>
</table>

### Invoice Details

- **Number**: S00002
- **Customer**: The Jackson Group
- **Total**: $1150.00
- **Invoice Status**: To invoice

### Additional Information

- **CONFIRM**
- **DRAFT**
- **POSTED**

- **This button takes you directly on the timesheet.**
- **0 Hours Recorded**
Your business is booming! MyOffice is now known for its quality products and services. But lately, you have been feeling the competition from bargain stores, who import their furniture from China. To differentiate yourself, you plan to manufacture your furniture on demand. This way you’ll improve your margins, while producing your furniture faster!

Install the Apps required to run the following business flow. Set-up the Work Orders in Settings.

Define the Bill of Materials
Purchase Raw Materials
Receive Products
Manufacture 3 Tables
Set up Operations & Work Centers
Plan a Manufacturing Order
Add a Quality Check
Check Your Quality Test
Control Cost
Manufacture

**Manufacturing**
Manufacturing Orders & BOMs

**Quality**
Control the quality of your products

**Operations**
**Work Orders**
Process operations at specific work centers.
Hi, we just finished the plans to manufacture the new Table. Can you review them?

You

Looks good!

I'll create the 4 products in the system (the Table and its components), as well as the Bill of Materials, according to your plan.

<table>
<thead>
<tr>
<th>Products</th>
<th>Quantity</th>
<th>Cost Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Table Top</td>
<td>1</td>
<td>40 $</td>
</tr>
<tr>
<td>Table Leg</td>
<td>4</td>
<td>12 $</td>
</tr>
<tr>
<td>Bolt</td>
<td>4</td>
<td>0.50 $</td>
</tr>
</tbody>
</table>

Product: Table - Cost Price 115$ - Sales Price 330$
**Define the Bill of Materials**

**Table**

<table>
<thead>
<tr>
<th>General Information</th>
<th>Sales</th>
<th>Purchase</th>
<th>Inventory</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Product Type</strong></td>
<td>Storable Product</td>
<td><strong>Sales Price</strong></td>
<td>$330.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Cost</strong></td>
<td>$115.00</td>
</tr>
</tbody>
</table>

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

The BoM is also accessible in the menu *Products ➤ Bills of Materials*

---

**Bill of Materials**

<table>
<thead>
<tr>
<th>Product</th>
<th>Quantity</th>
<th>BoM Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Table</td>
<td>1.00</td>
<td>Manufacture</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Component</th>
<th>Quantity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Table Top</td>
<td>1.00</td>
</tr>
<tr>
<td>Table Leg</td>
<td>4.00</td>
</tr>
<tr>
<td>Bolt</td>
<td>4.00</td>
</tr>
</tbody>
</table>

The BoM is accessible via the menu *Products ➤ Bills of Materials*.
Hi, can you send me a quotation for 100 table tops, 400 table legs, and 400 bolts?

Sure. Here is our offer.

Sounds good, I'll send you the purchase order by email.
<table>
<thead>
<tr>
<th>Product</th>
<th>Quantity</th>
<th>Unit Price</th>
<th>Taxes</th>
<th>Subtotal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Table Top</td>
<td>100</td>
<td>40.00</td>
<td>Tax 15.00%</td>
<td>$ 4,000.00</td>
</tr>
<tr>
<td>Table Leg</td>
<td>400</td>
<td>12.00</td>
<td>Tax 15.00%</td>
<td>$ 4,800.00</td>
</tr>
<tr>
<td>Bolt</td>
<td>400</td>
<td>0.50</td>
<td>Tax 15.00%</td>
<td>$ 200.00</td>
</tr>
</tbody>
</table>

Untaxed amount: $ 9,000.00  
Tax 15.00%: $ 1,350.00  
Total: $ 10,350.00  

Taxes depend on countries. Depending on the accounting package installed, you won't have the same tax percentage as the one in the example.
Hello, we just received the products from Only Woods Inc. There are 400 table legs and 400 bolts, but they only delivered 80 table tops. Should I validate the receipt?

Yes, confirm the reception with a backorder for the 20 remaining products. They’ll deliver the remaining products later.
You have processed less products than the initial demand.

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

I'm on it.
Manufacture 3 Tables

Product: Table
Bill of Material: Table
Quantity: 3.00 Units

Components:

<table>
<thead>
<tr>
<th>Product</th>
<th>To Consume</th>
<th>Reserved</th>
<th>Consumed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Table Top</td>
<td>3.00 / 3.00</td>
<td>3.00</td>
<td>3.00</td>
</tr>
<tr>
<td>Table Leg</td>
<td>12.00 / 12.00</td>
<td>12.00</td>
<td>12.00</td>
</tr>
<tr>
<td>Bolt</td>
<td>12.00 / 12.00</td>
<td>12.00</td>
<td>12.00</td>
</tr>
</tbody>
</table>

CONFIRM
CONFIRMED
IN PROGRESS
DONE

MARK AS DONE
MARK AS DONE
CONFIRMED
IN PROGRESS
DONE
I plan to organize the manufacturing line by creating 2 work centers of 60 min each: Assembly Station and Painting Room. Can we put a tablet with instructions on each station?

Sounds like a good idea. I’ll create the 2 operations: Assembly and Painting from the table’s Bill of Materials.

Thanks. I created this document to help our workers: http://odoo.com/r/worksheet Can you upload this worksheet to the assembly operation?
Repeat for the Operation "Painting" with the work center "Painting Room".
Sharlene, our operations are set up. We can create and confirm a manufacturing order for the table.

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

I’ll test the work center control panel at the same time.
Continue the production by working on the order related to the Painting work center and mark it as done.
Hi, we’ve got 5 customers complaining about a defect in their table. Looks like the table top separates from the legs after a few months.

It’s probably related to the bolts. I will create a Control Point in Quality Control on the Assembly operation to measure the torque.

We will ensure that the measurement stays between 11.00 and 15.00 Nm.
Add a Quality Check

New

Title: Torque Setting
Control Frequency: All

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

Products: Table
Operations: MyOff.: Manufact.
Work Order: Assembly

Type: Measure
Norm: 13.00 Nm
Tolerance: from 11.00 to 15.00
Worksheet: Scroll to specific page
Worksheet Page: 3

“Scroll to specific page” allows you to designate the right page of the worksheet when it's time to perform quality control.

If you install the IoT App, you can send the measurement automatically from the connected device to Odoo.
Sharlene, I added a control point on the assembly operation.

That’s good, we have to create a new table. We will have the opportunity to test it on the Control Panel through the work orders with the tablet view.

FYI, the torque setting measurement should be between 11 and 15 Nm.
Check your Quality Test

Product: Table
Quantity to Produce: 1.00 Units
Bill of Material: Table

Operation
<table>
<thead>
<tr>
<th>Operation</th>
<th>Manufacturing</th>
<th>Status</th>
<th>Start</th>
<th>Block</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assembly</td>
<td>WH/IN/00003</td>
<td>Ready</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Painting</td>
<td>WH/IN/00003</td>
<td>Waiting for ano...</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Measure: 14.00 Nm

Date: 01/18/2022 14:57:01
Operator: Admin
Title: Torque Setting
Result: 14 Nm
Status: Done
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 **Structure & Cost** on the Bill of Materials for theoretical costs if you want to update it.
As Anita doesn't have the user access rights for Manufacturing, you can send her a document with the details of the BoM.

Click on **PRINT** and a pdf will automatically be downloaded.
Use **Barcodes**

To speed up your inventory operations, you plan to use barcode scanners in the warehouse. With barcodes, your team will pick products faster and more accurately. **Install the Barcode app.**

This game requires any USB barcode scanner, or a phone with the Odoo Mobile app installed. You can download it in the Apple store or the Google Play Store. Connect to your database via your smartphone to continue the game.

**Configure** the Barcode Scanner

**Set up** your Product

**Receive** Products

**Sell** Products

**Deliver** Products

**Adjust** Inventory

**Define** Locations

**Move** Products
Use Barcodes

Barcodes

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

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

- WH-RECEIPTS
- DESK12345678
- O-BTN.validate
- O-CMD.MAIN-MENU
- O-BTN.pack
- WH-STOCK
- ZONEA
- ZONEB

Use barcode scanners to process logistics operations.

You can also install the feature by going to Inventory > Settings.
Hey, we received the USB barcode scanner you ordered last week.

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

Scan any barcode in a text editor to make sure it works.

IT WORKS!
If you don't have a barcode scanner, you can use your smartphone. For this, install the Odoo mobile app (available on Google Play and the Apple Store) on your phone and connect to your edu- database, so that you can play using your computer and smartphone in parallel.

Note that you'll need to authorize the Odoo app to use your camera when you hit the “Tap to Scan” button or the barcode at the top of the purple menu.

Also, if your phone’s camera has a wide angle, hide the barcodes you don't need with another card to avoid scanning the wrong barcode.

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. With a smartphone, use any barcode or QR code scanner.

   ![Barcode Image]

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

   ![Editor Image]

   *It works!*

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

Ok, I’ve added the barcode reference DESK12345678 to the Large Desk.
The barcode reference must perfectly match DESK12345678 (uppercase letters, no space), otherwise the barcode scanner might not recognize the product.
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?

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

1. Initiate a receipt.

WH-RECEIPTS

2. Scan the product, 3 times.

DESK12345678

3. Validate the transaction.

O-BTN.validate

You can also add more quantities of a product by tapping on +1.
Hi, Brandon from Azure Interior speaking. I’d like to buy 3 large desks. Can you send me the order?

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

That’s correct!
<table>
<thead>
<tr>
<th>Product</th>
<th>Quantity</th>
<th>Unit Price</th>
<th>Taxes</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Large Desk</td>
<td>3.00</td>
<td>220.00</td>
<td>15.00%</td>
<td>$ 660.00</td>
</tr>
</tbody>
</table>

**Untaxed Amount:** $ 561.00  
**Taxes:** $ 99.00  
**Total:** $ 660.00
Hi, can you deliver Azure Interior’s order? It’s a high priority.

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

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

**Bonus Point** • If you thought about activating the packages management feature, you get an extra ⭐️⭐️
Hi, the system tells me there are 4 Large Desks on hand. However, I see only 3 in the warehouse.

Ok, let’s make an inventory adjustment. We probably scraped one of the desks.
1. Scan 3 times

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

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

Ok. So, I’ll divide our main stock (the Parent Location, WH/Stock) into 3 zones. I’ll create these 3 new internal locations: ZoneA, ZoneB, ZoneC with their respective barcodes: ZONEA, ZONEB, ZONEC.
The barcode of a location is usually scanned from the shelf. It's scanned in order to record the spot where products have been taken from and where they'll be moved.

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

Repeat this operation to create the two other locations:

- ZoneB • Internal Location • ZONEB
- ZoneC • Internal Location • ZONEC

The barcode of a location is usually scanned from the shelf. It's scanned in order to record the spot where products have been taken from and where they'll be moved.
Sharlene • Manufacturing Engineer

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

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

Ok, I’m on it.
To start an internal move, scan the source location from the barcode app home.

Then, scan 3 times the products you picked.

Next, scan the destination shelf: ZONEA.

Finally, validate it.
Create your App

Following the great feedback you received from your Office Design services, you are ambitious and want to go further. So, you plan to rent fully-furnished offices. You already have a few offices, but you need a dedicated app to manage the properties.

Install the Studio App to run the following business flow.

1. Initialize your App
2. Design Office Form
3. Manage Rental Status
4. Record your Offices
5. Improve the List view
6. Add a Kanban view
7. Create Statistic Reports
8. Design a Report Template
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.

To quickly search for an app, you can use the top-right search bar.
We need an app to manage our properties. It’s not efficient to do everything in a spreadsheet.

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

I’ll create an Office Rental app to manage our Offices.
Choose an app name
Office Rental

Create your first object name
Offices

Suggested features for your new model
- Picture
  Attach a picture to a record
- Monetary value
  Set a price or cost on records
What information do you need on an office form?

Sophia • Sales Manager

As I mentioned, I’ll need the name, photo, and rental price, but also the capacity (number of available desks), address, and type of office (open space or closed space).
Once a field is dropped, you should edit its Label in the left menu under “Properties”.

If you want to use existing contacts for the address, use a Many2one with the relation “Contact”, instead of a Text field.
Sophia • Sales Manager

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

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

You

Yes! I can add a pipeline status bar to the form.
Sophia, I created the Office Rental app. Can you add our properties in the app?

You

Sophia • Sales Manager

Ok, I will create our 3 offices for rent.

Creekside
645 Creekside Drive
Open Space • 15 desks

Chestnut
1450, Chestnut Street
Closed Space • 150 desks

Merriman
4597 Merriman Street
Open Space • 45 desks

Available $2000

Available $3500

Leased $65000
Repeat this operation to create the two other offices.

<table>
<thead>
<tr>
<th>Name</th>
<th>Address</th>
<th>Type</th>
<th>Capacity</th>
<th>Rent</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chestnut</td>
<td>Chestnut Street, 1450</td>
<td>Closed Space</td>
<td>150</td>
<td>65 000</td>
<td>Leased</td>
</tr>
<tr>
<td>Creekside</td>
<td>Creekside Drive, 645</td>
<td>Open Space</td>
<td>15</td>
<td>2 000</td>
<td>Available</td>
</tr>
</tbody>
</table>
Sophia • Sales Manager

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

You

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

![Office Rental](image)

<table>
<thead>
<tr>
<th>Name</th>
<th>Type</th>
<th>Capacity</th>
<th>Rent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Merriman</td>
<td>Open Space</td>
<td>45</td>
<td>3,500.00</td>
</tr>
<tr>
<td>Chestnut</td>
<td>Closed Space</td>
<td>150</td>
<td>65,000.00</td>
</tr>
<tr>
<td>Creekside</td>
<td>Open Space</td>
<td>15</td>
<td>2,000.00</td>
</tr>
</tbody>
</table>

**Info-Circle**

When you are customizing a screen with Studio, you can easily switch to other views, using the Views tab.
Is it possible to have an overview of which offices are available or leased?

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

Multiple Records Views

Activate View

Kanban

View

Add tags
Merriman
Add a Priority
Add an avatar

Default Group by
Status
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?

Good idea, I’ll get the availability ratio (percentage of available desks by type).
Bonus Point • You get an extra 🌟 if you found the following, with measures = Capacity and group by "Status".
Sophia • Sales Manager

We’d like to publish our available offices in a magazine.

Is it possible to create a display with the image, name, address, rent, type, and capacity? Ideally, with a short text about us at the bottom of the page?

Sure! I’ll create the ad for you, directly from the “Reports” menu in the app.

Merriman

Merriman Street 4597

Rent
$3500.00

Type
Open Space

Capacity
45
### Design a Report Template

**CREATE**

**Blank**
No header/footer

#### Block

- **Field**
- **Field**
- **Field**
- **Field & Label**
- **Title Block**
- **Text**

#### About MyOffice Inc.

We are a team of passionate people whose goal is to improve everyone’s life through disruptive products. We build great products to solve your business problems.

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