SCALE
UP!

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 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!

Game Rules

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

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

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

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

Your Score

Pile the cards front-side up, if you found the solution before looking at the back (even if you did it differently). Pile the cards with their back-side up, if you missed something in the solution. At the end of the game, count the stars at 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 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:

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

Buy & Sell

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

Start Now. It's Free

CRM	○	**Sales**	✓	Invoicing	○
Accounting	✓	Project	○	Timesheets	○
Inventory	✓	**Purchase**	✓		
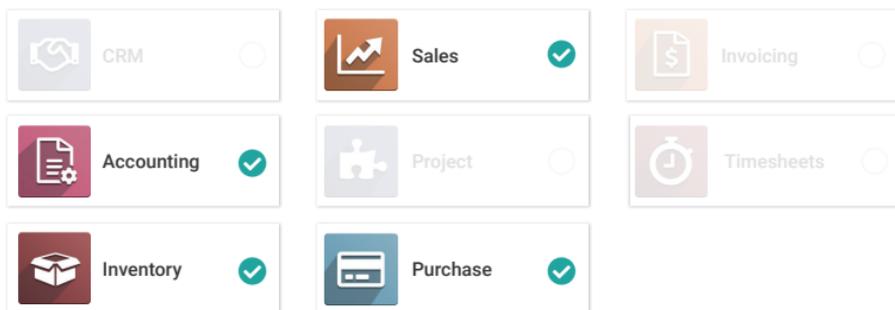
ⓘ These are the minimum set of apps required for the flow, but you can install more.

Configure ›

Company Name
MyOffice Inc.

edu-myoffice-inc.**odoo.com** ✎

Country
United States ▾

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

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

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

Start now ›

Create a Product

Marc • Purchase Manager

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

You

What's the cost?

Marc • Purchase Manager

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

You

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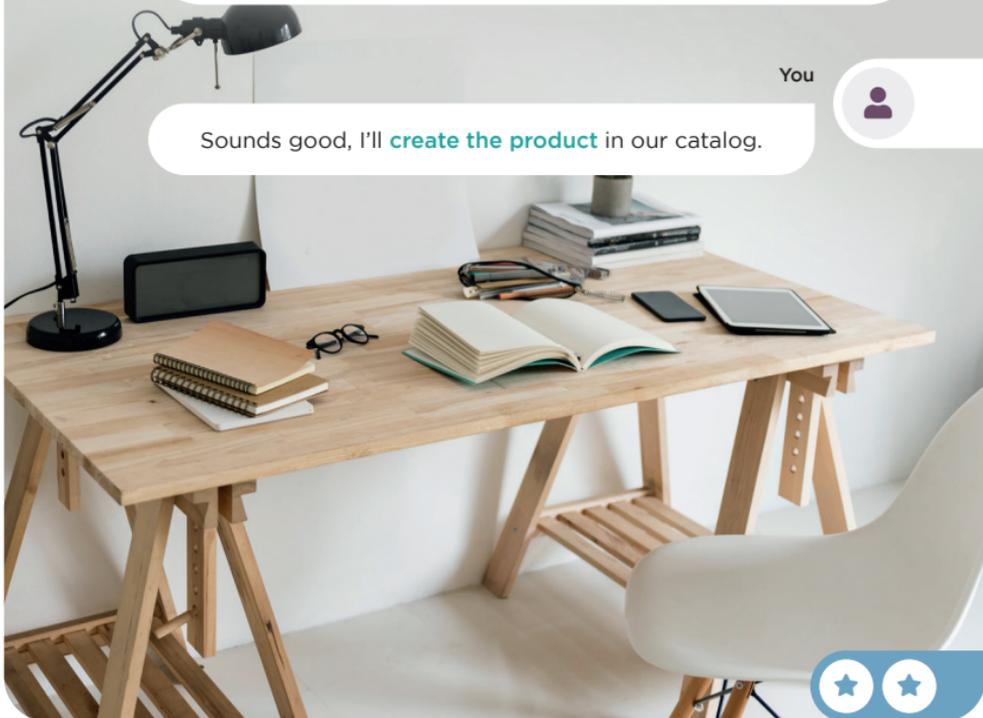
Create a Product

Purchase   **Products** ▸ Products   **CREATE**

Product Name

☆ **Large Desk**

| General Information | Sales | Purchase |

Product Type Storable Product ▾   **Sales Price** $ 220.00

Cost $ 140.00

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

| General Information | Sales | Purchase |

	Vendor	Quantity	Price	⇄
⇕	Wood Corner	10.00	100.00	🗑
⇕	Wood Corner	1.00	140.00	🗑

ⓘ If you don't record a vendor, Odoo automatically creates it 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 • Sales Manager

Between 9 and 12.

You

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

Purchase Large Desks

	Purchase	Orders ▸ Requests for Quotation	CREATE

Vendor   Wood Corner   ▾

Products   Other Information

Product	Quantity	Unit Price	Taxes	Subtotal	
Large Desk	10.000	100.000	15.00%	$ 1,000.00	🗑

Add a line

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

ℹ Optionally, you can send it by email.

SEND BY EMAIL	▶	RFQ	**RFQ SENT**	PURCHASE ORDER

CONFIRM ORDER	▶	RFQ	RFQ SENT	**PURCHASE ORDER**

ℹ This button takes you directly to the Receipt document.

🚚 **1** Receipt

Incoming Call...

Hello, I'm the driver from Wood Corner.

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

You

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

Receive Products

⊞ 📦 **Inventory**

Receipts

⋮

1 TO PROCESS

Reference	Contact	Status
WH/IN/00001	Wood Corner	Ready

EDIT

WH/IN/00001

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

| Operations | Additional Info | Note |

| Product	Demand	Done	
Large Desk	10.000	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.

VALIDATE   ▶   DRAFT WAITING READY **DONE**

Paul • Secretary

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

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

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

MyOffice Inc
1725 Slough Avenue
Scranton PA, 18540
United States

Invoice 2022/0123

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

Please use the following communication for your payment:
INV/2022/0123

Payment terms: **2 months**

Control the Bill

Accounting | Vendors ▸ Bills | **CREATE**

Vendor	Wood Corner ▾	Bill Date	▾

Auto-Complete Select a p. o. ▾

P00001: $ 1,000.00

Invoice Lines	Journal Intems	Other Info

Product	Quantity	Price	Taxes	Subtotal	
Large Desk	10.000	100.000	15.00%	$ 1,000.00	🗑

Add a line

CONFIRM ▸ DRAFT **POSTED**

⭐ **Bonus Point** • There is a difference between the bill auto-completed by Odoo ($100) and the vendor bill ($110). When this happens, you usually send a message to the vendor. You get an extra ⭐ if you noticed it (even if you did not send the message).

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

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.

☺ 📎 ⤢

SEND

Brandon • Customer

Hi, Brandon from Azure Interior speaking.

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

You

You'll get it by email right now!

Sell Products

Sales | **Orders** ▸ Quotations | **CREATE**

Customer   Azure Interior, Brandon ▾

| Order Lines | Optional Products | Other Info |

Product	Quantity	Unit Price	Taxes	Subtotal	⋮
Large Desk	3.00 📊	220.00	15.00%	$ 660.00	🗑

Add a product   Add a section   Add a note

ⓘ Clicking on 📊 gives you details about the stock.

SEND BY EMAIL ▶ | QUOTATION | **QUOTATION SENT** | SALES ORDER

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

QUOTATION | QUOTATION SENT | **SALES ORDER**

ⓘ This button takes you directly to the Delivery Order.

🚚 1 Delivery

⭐

Deliver to Customer

Roger • Inventory Manager

I'm in a meeting this morning.

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

You

Okay, I'll check this right away!

Deliver to Customer

6

Delivery Orders ⋮

1 TO PROCESS

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

VALIDATE

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

APPLY

DRAFT > WAITING > READY > **DONE**

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

Anita • Accountant

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

You

I'm on it!

Sales   **To Invoice** ▸ Orders to Invoice

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

CREATE INVOICE

Create Invoice   ● Regular invoice

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

CREATE AND VIEW INVOICE

Product	Quantity	Price	Taxes	Subtotal
Large Desk	3.00	220.00	Tax 15.00%	$ 660.00

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

CONFIRM   ▸   DRAFT   **POSTED**

Inbox (1)

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

You

Let's register this payment in the invoice.
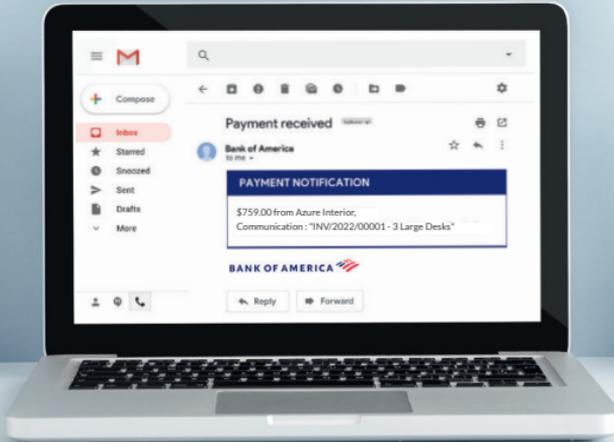
Accounting   Customers ▸ Invoices

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

REGISTER PAYMENT

Journal	Bank ▾
Amount	$759.00

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

CREATE PAYMENT

DRAFT **POSTED**

ℹ Instead of recording payments manually, you can synchronize your bank with Odoo (it supports integration with 35,000 banks), or import bank statement files. Reconciliation becomes much faster as matches are suggested automatically.

You

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

Anita • Accountant

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

Accounting   Reporting ▸ Profit & Loss

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

	Continental	Anglo-saxon	Anglo-saxon w/ perpetual valuation
Income	**660.00 €**	**$ 660.00**	**$ 360.00**
▸ **Operating Income**	660.00 €	$ 660.00	$ 660.00
Cost of Revenue			– $ 300.00
Expenses	1000.00 €		
Expenses	1000.00 €		
Depreciation			
Net Profit	– 340.00 €	$ 660.00	$ 360.00

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

Congratulations!

What's next? Choose your strategy:

Run a Store
Start selling in your showroom.

Sell Services
Target new customer segments.

Manufacture
Build your own products.

Sell Online
Create an eCommerce website.

Run *a Store*

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

Install the Point of Sale app.

Import Products	1
Configure Cash Control	2
Sell 3 LED Lamps	3
Cash Out Money	4
Sell with an Invoice	5
Return 1 LED Lamp	6
Control Cash	7
Analyze the PoS Sales	8

Run a Store

Apps

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

INSTALL

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

Import your Products

You

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

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

Roger • Inventory Manager

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

You

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

To import files, use the ⭐**Favorites** menu from the products screen.

Import your Products

Point of Sale

Product ▶ Products

★ Favorites

...

Import records

UPLOAD FILE

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

Imported file

📄 *POS_Products*

☑ Use first row as header

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

IMPORT

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

General Information	Variants	Point of Sales

Category   Desks   ▼

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

🏠	Desks	Office Supplies	Miscellaneous

Configure Cash Control

You

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

Anita • Accountant

Sure. I can give you $550.

You

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

x10 x2 x1 x1 x2 x4

Configure Cash Control

Point of Sale   Dashboard   **NEW SESSION**

OPENING CASH CONTROL

Opening cash   550

Open session

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

The *Notes* field allows you to add extra information. Any notes created will reappear at the closing of a Point of Sale session.

Mike • Customer

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

You

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

Mike • Customer

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

LED Lamp   **$ 320.00**
2.00 Unit(s) at $ 200.00 / Unit
With a **20%** discount

LED Lamp   **$ 200.00**
1.00 Unit(s) at $ 200.00 / Unit

$ 200.00

LED Lamp

Total: $ 598.00
Taxes: $ 78.00

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

Cash   600.00 ⊗   **Validate »**

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

ⓘ
You can also add products in the POS by scanning the barcode.

⭐

Cash Out Money

Anita • Accountant

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

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

You

Ok, I'll come right away with the money!
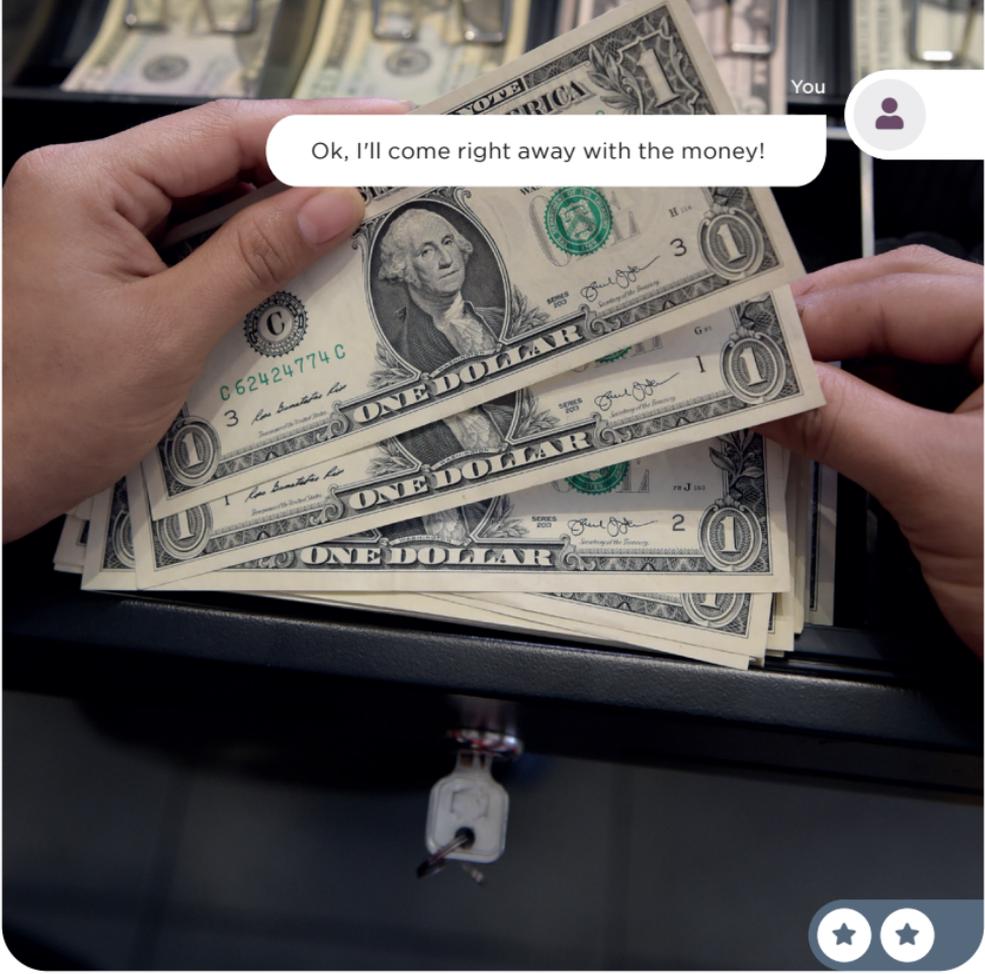
Cash in/out

| 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.

| 2 📶 | ➡ Close | 2 ⋮ | ➡ Close | 📶 | ➡ Close |

Jennie • Customer

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

You

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

Jennie • Customer

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

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

Sell with an Invoice

👤 Customer

▸ Create

📷 Jennie Fletcher

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

▸ Save

$ 100.00

Whiteboard

→

Payment

Cash	▸	Cash	200.00 ✕

👤 **Jennie Fletcher**   ▸   **Validate »**

Change **$ 85.00**

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

⭐

Mike • Customer

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

You

Sure, no problem!

Return 1 LED Lamp

6

New Order » ▸ ↺ Refund

Receipt Number	Total	Status
Order 00001-001-0002	$ 115.00	Paid
Order 00001-001-0001	**$ 598.00**	**Paid**

LED Lamp	$ 230.00
1,00 Unité(s) à 200,00 € / Unité(s)	

	1	2	3	Qty
Refund	4	5	6	Disc
	7	8	9	Price
	+/-	0	.	⌫

Payment ▸ | Cash | -230,00 ⊗ |

▸ Validate »

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!!

⇨ Close

CLOSING CONTROL

Total 3 orders	$ 483.00	Money details:
Payments	$ 483.00	- 10 x $ 1.00
		- 2 x $ 5.00
		- 1x $ 10.00

Payment Method	Expected	Counted
Cash	$ 1,021.00	1 021
Opening	$ 550.00	
- Sandwiches	$ 12.00	
+ Payment in Cash	$ 483.00	

Close Session

ⓘ

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.

★

Analyze the PoS Sales

Anita • Accountant

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

You

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

Point of Sale   Reporting ▶ Sales Details

Sales Details

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

PRINT

Sales Details

Products

Products	Quantity	Price Unit
[FURN_0003] LED Lamp	0.0	200.0
[FURN_0003] LED Lamp	2.0	200.0 Disc: 20%
[FURN_009] Whiteboard	1.0	100.0

Payments

Name	Total
Cash	483.00

Taxes

Name	Tax Amount	Base Amount
Tax 15.00%	63.00	420.00

Total: 483.00

Sell *Online*

Locally, the MyOffice brand is recognized for its quality and service. It's time to go global and establish a web presence to showcase your great products. You plan to 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	1
Create a Product	2
Improve SEO	3
Set up a Product Configurator	4
Test your eCommerce	5
Upsell Customers	6
Write a Blog Post	7

Sell Online

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.*

🔊 News

Blogging and posting

Build my website

You

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

Sophia • Sales Manager

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

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

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

Design your Homepage

1

Desks Manufactured on Demand

Contact us

CUSTOMIZE

Cover

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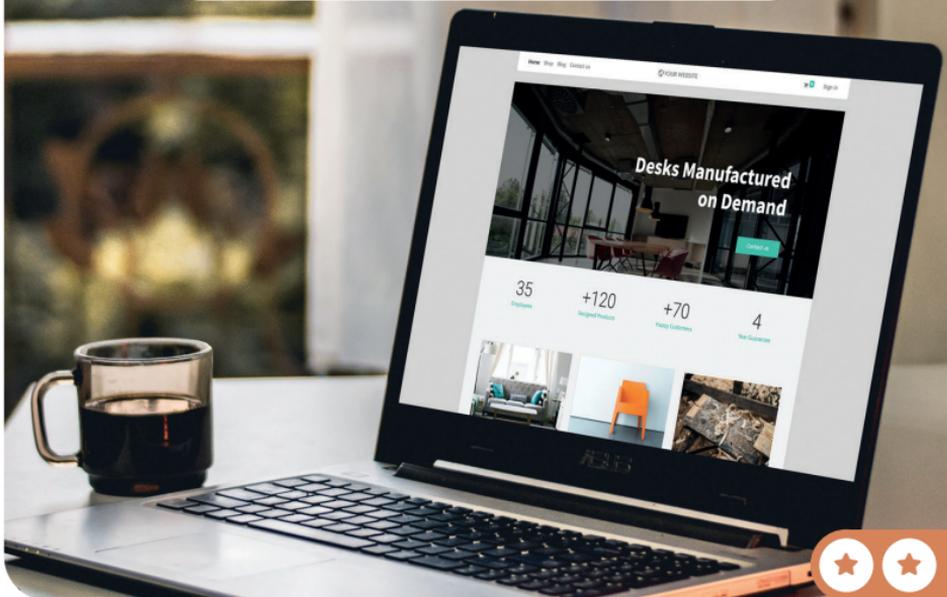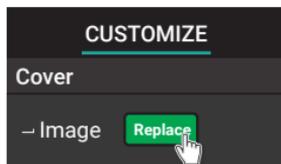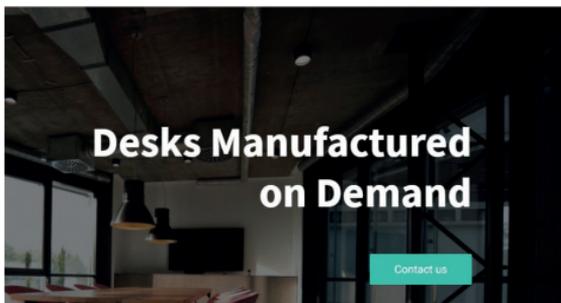
When searching for an image, Odoo suggests illustrations and pictures free of charge.

Search an image

37	+700	120	4
Employees	Happy Customers	Designed Products	Years of Warranty

BLOCKS

45   91

Numbers

Background

You Customize
To buy unique pieces is to buy a piece of the artist. His passion put in the execution of the object, his hours of reflexion, his dexterity... it is a committed, ethical act.

We design
Whether it is to help you see clearly in a project, to confirm a choice or when you have no idea about the layout of your interior, our advisers are there to

We manufacture
Every week our shop receive new products. Some are only on sale for a limited period of time.

BLOCKS

Columns

Image

Transform

Flexible   1:1

✔ APPLY

Save

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

☑ **Published**   📱   **+ New**   ✏ **Edit**
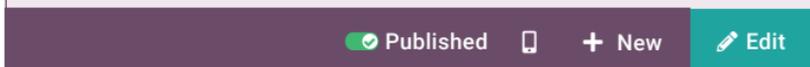
Create a Product

2

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

2

+ New

Page

Product

Blog Post

New Product   ✕

Product Name: Office Chair

Create

1 Upload an image

2 Set the price   **$ 120.00**

Save

All Products > Office Chair

Search...

Office Chair

$ 120.00

−   1   +

🛒 Add to Cart

Sophia • Sales Manager

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

You

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

Improve SEO
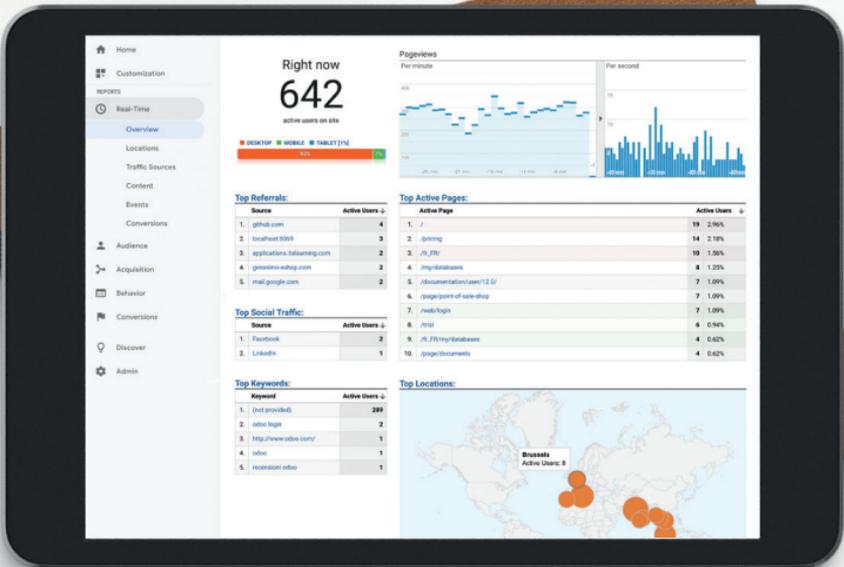
Title ⑦

Office Chair On Sale | MyOffice Inc.

Custom Url ⑦

/shop/   office-chair

Keywords

office chair   English (US) ⌄   **Add**

Preview

Office Chair On Sale | MyOffice Inc.
myoffice.odoo.com/shop/office-chair-on-sale
Get the best office chairs for sale, buy online now.

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.

Office Chair On Sale | MyOff

← → C   myoffice-inc.odoo.com/shop/**product/office-chair-on**-sale-32

⊞ Website   🟢 Published   ✏ Edit

All Products > Office Chair   Search... 🔍

Office Chair

$ 120.00

ⓘ   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.   🟢✓ Published

Sophia • Sales Manager

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

You

Ok, I will **activate the variants** feature
and **configure it 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   4

		Sales	Configuration ▸ Settings

Product Catalog

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

	Sales	Products ▸ Products ▸ Office Chair	**EDIT**

☆ Office Chair

General Information	**Attributes & Variants**	Sales

Attribute	Values
Size	Small Medium Large
Color	Grey White Black Purple

Attribute Name   Color

Display Type   ◉ Color

Embroidery	Custom No embroidery

Attribute Name   Embroidery

Display Type   ◉ Select

Variants Creation Mode   ◉ Never (option)

Attribute Values

Value	Is custom Value
No embroidery	☐
Custom	☑

You

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

Sophia • Sales Manager

Sure!
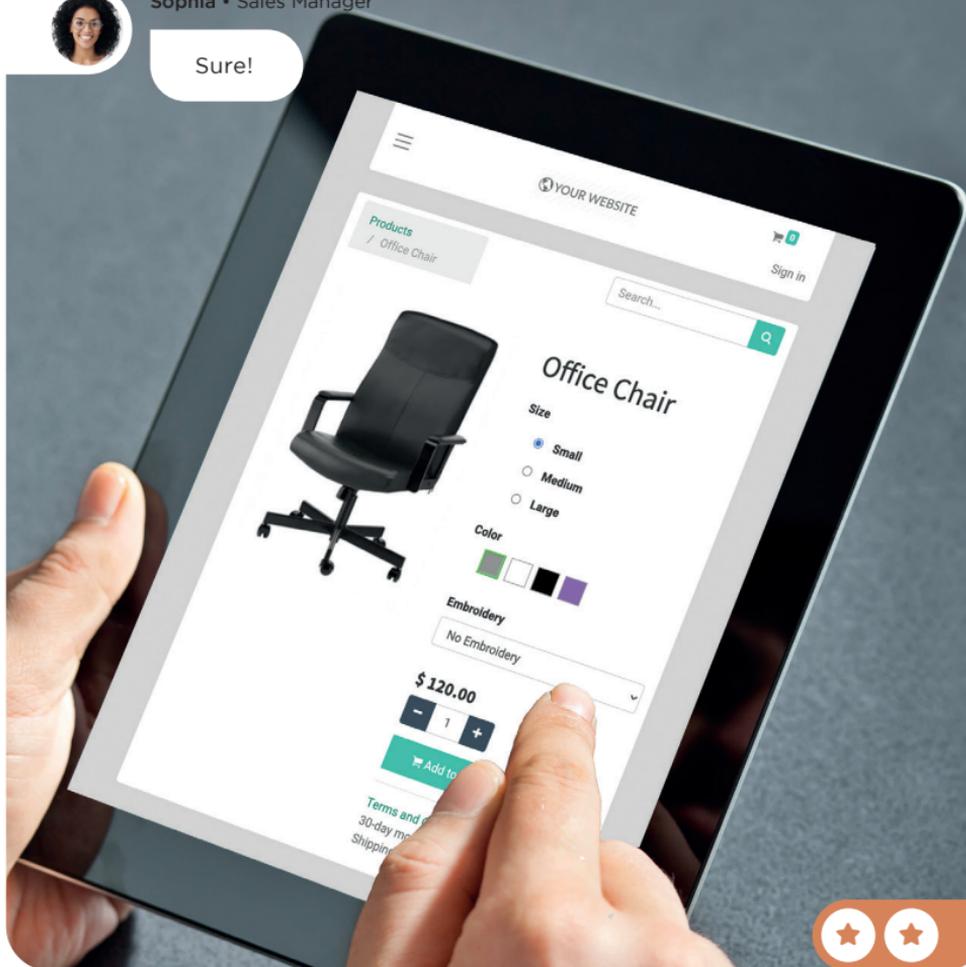
| | 🌍 Go to Website | |

Office Chair

$ 120.00

SIZE

◉ Small   ◯ Medium   ◯ Large

COLOR

⬤ ⬤ ⬤ ⬤

EMBROIDERY

No Embroidery ⌄

[−] 1 [+]   🛒 Add to Cart

🛒 1

● Review Order   ◯ Address   ◯ Confirm Order

Product	Quantity	Price
Office Chair Embroidery: No embroidery	[−] 1 [+]	$ 120.00

Process Checkout ❯

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

Process Checkout

✓ Review Order   ✓ Address   ◉ Confirm Order

ℹ 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?

You

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.

Website | eCommerce ▸ Products | **CREATE**

☆ Warranty: 3 years

| General Information | Variants | Sales | eCommerce |

Product Type Service   **Sales Price** $50

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

| General Information | Variants | Sales | eCommerce |

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.

Write a Blog Post

Sophia • Sales Manager

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

You

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

Write a Blog Post

Website	GO TO WEBSITE	+ New

Page

Product

Blog Post

New Blog Post   ✕

Select Blog   News   ⌄

Create

ⓘ To set a cover for your blog, click on the title then click on the 📷 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	1
Create a Task	2
Perform the Job	3
Configure a Product	4
Sell the Design Service	5
Record Timesheet	6
Invoice Customer	7

Install the Apps

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 ⚙ Action

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

⚙ Settings ▸ ⚙ General Settings

Discuss

☑ **Custom Email Servers**
Configure you own email servers

Alias Domain @mycompany.com

SAVE

Set up a Project

1

You

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

Audrey • Interior Designer

It starts with an 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.

You

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

1

⊞ 🧩 Project **CREATE**

Project Name	Office Design
Timesheets	☑
Create tasks by sending an email to	design _____ @myoffice.odoo.com

CREATE

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

Meeting ⚙ +	Design +	Floor Plan +	Quotation +	Done **ADD**
▬▬▬ 0	▬▬ 0	▬▬ 0	▬▬ 0	See examples

ⓘ 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.

⭐

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.
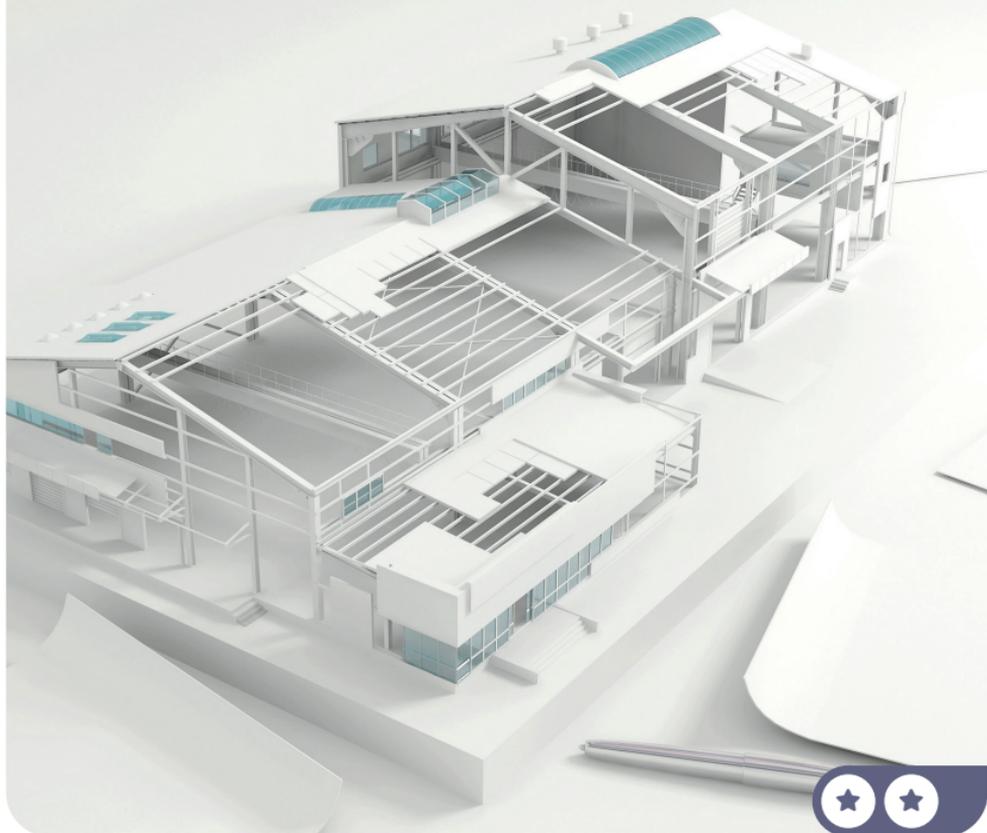
✉ **From your personal Inbox**

New Message _ ↗ ✕

To (design@yourdomainname.odoo.com ✕)   Cc Bcc

Subject   Boogle NY

Hi Audrey,

Boogle in New York just signed!
Here's a picture of their office they'd like to redesign.

Thanks!

boogle-old-office.jpg (101K)   ✕

Send   A ⫰ ⮑ ☺ ▲ 🖼   🗑 ⋮

ⓘ
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.

You

Audrey, you should have a new task for "Boogle NY" under the Office Design project. Can you prioritize it?

Audrey • Interior Manager

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.

Project

⭐ **Office Design**   ⋮
✉ design@myoffice-inc.odoo.com

1 Tasks

Meeting   +
    1

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

| **Activity Type** | Meeting ▾ |
| **Summary** | Visit Boogle's Office |

OPEN CALENDAR

Configure a Product

4

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.

Configure a Product

4

☆ **Office Design Service**

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

| General Information | Variants | Sales | Accounting |

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

ⓘ If **Product Type** is set as **Service**, the sales order can generate a task or a project. It helps you organize your service activities according to what has been sold.

Invoicing policy Based on Timesheets ▼

Create on Order Task ▼

Project Office Design ▼

Unit of Measure Hours ▼

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

⭐

Sell the Design Service

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!

You

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

Sell the Design Service

Sales | Orders ▸ Quotations | **CREATE**

Customer   The Jackson Group ▼

Order Lines	Optional Products	Other Information

Product	Qty	Unit Price	Taxes	Subtotal
Office Design Service	20.000	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**

ⓘ Links to the Project (and to the task) have been included on the sales order, in the top right corner.

	1 Projects	**1** Tasks

Record Timesheet

You

Audrey, as we charge customers based on hours spent, don't forget to record your timesheet on tasks with the "Start" button.

Audrey • Interior Manager • *32 minutes ago*

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

Audrey • Interior Manager • *Now*

Ok, I've just started to work on the design for The Jackson Group. I'll log the time spent.
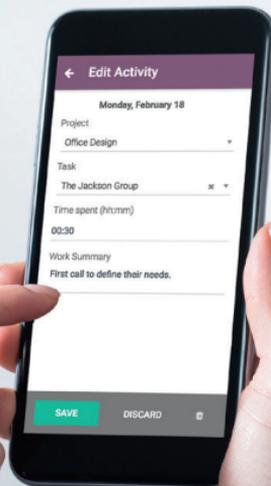
Timesheet

▶ START 00:28:24 ⬛ STOP

Design | Office Design ▼ | S00002 : Office Design S... ▼

	Mon,	Tue,	Wed,	Thu,
a Office Design / S00002: Office De...	0:00	0:00	0:30	0:00
			0:30	

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

ⓘ **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.

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.
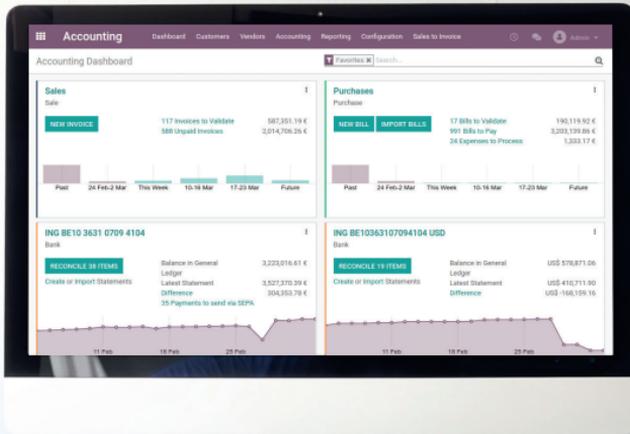
Sales ▸ **To Invoice** ▸ Orders to Invoice

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

CREATE INVOICE

Create Invoice ⦿ Regular invoice

CREATE AND VIEW INVOICE

Product	Quantity	Price	Taxes	Subtotal
Office Design Service	0.50	50.00	15.00%	$ 25.00

CONFIRM ▸ DRAFT POSTED

ⓘ This button takes you directly on the timesheet.

🕐 **0 Hours** Recorded

Manufacture

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

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

Define the Bill of Materials — 1

Purchase Raw Materials — 2

Receive Products — 3

Manufacture 3 Tables — 4

Set up Operations & Work Centers — 5

Plan a Manufacturing Order — 6

Add a Quality Check — 7

Check Your Quality Test — 8

Control Cost — 9

Manufacture

Manufacturing
Manufacturing Orders & BOMs

INSTALL

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 1

Ronnie • Head of Engineering

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

You

Looks good!

I'll **create the 4 products** in the system (the Table and its components), as well as 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 $
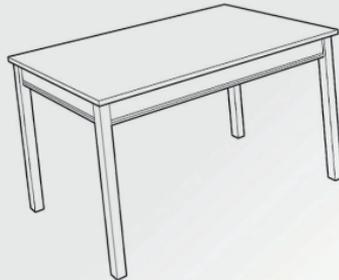
Define the Bill of Materials

🔧 **Manufacturing**   Products ▶ Products   **CREATE**

☆ Table

| General Information | Sales | Purchase | Inventory |

Product Type   Storable Product ▼   **Sales Price** $ 330.00

                                          Cost $ 115.00

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

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

Routes   ✓ Manufacture

🧪 **0 Bill of Materials**   ▶   **CREATE**   ⓘ The BoM is also accessible in the menu *Products ▶ Bills of Materials*

Product   Table ▼   **BoM Type**   ⦿ Manufacture this product
Quantity   1.00

Component	**Quantity**
Table Top	1.00
Table Leg	4.00
Bolt ▼ ⬈	4.00

You

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

Only Woods Inc. • Sales Representative

Sure. Here is our offer.

You

Sounds good, I'll send you the purchase order by email.

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

Only Woods

Expected Date
01/15/2019 12:58:26
01/15/2019 12:59:24
01/15/2019 12:59

Offer 2022/0123
Request for Quotation PO000100

Description
[URN, 8522] Table Top
2333] Table Leg
57] Bolt

Purchase   **CREATE**

Vendor	Only Woods Inc. ▼

Products | Other Information

Product	Quantity	Unit Price	Taxes	Subtotal	
Table Top	100	40.00	(Tax 15.00%)	$ 4,000.00	🗑
Table Leg	400	12.00	(Tax 15.00%)	$ 4,800.00	🗑
Bolt	400	0.50	(Tax 15.00%)	$ 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 won't have the same tax percentage as the one in the example.

CONFIRM ORDER ▶   RFQ   RFQ SENT   **PURCHASE ORDER**

SEND PO BY EMAIL

Randall • Inventory Officer

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

You

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

Receive Products

Inventory

Receipts

⋮

1 TO PROCESS

Another way to confirm the reception is to click on the Receipt button on the purchase order.

🚚 **1** Receipt

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

WH/IN/0002

Partner   Only Wood Inc. ▼

Source Document   P00002

Operations	Additional Info	Note

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

VALIDATE

DRAFT ⟩ WAITING ⟩ **READY** ⟩ DONE

You have processed less products than the initial demand.

CREATE BACKORDER

⭐

Manufacture 3 Tables

4

You

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

Ernest • Worker

I'm on it.

Manufacture 3 Tables

4

CREATE

Product	Table ▾
Bill of Material	Table ▾
Quantity	3.00 Units ▾ To Produce ⛰

CONFIRM ▸ **CONFIRMED**   IN PROGRESS   DONE

Quantity 3.00 / **3.00** Units   **To Produce** ⛰

Components	Work Orders	Miscellaneous

Product	To Consume	Reserved	Consumed
Table Top	3.00 / 3.00	3.00 ⛰	3.00
Table Leg	12.00 / 12.00	12.00 ⛰	12.00
Bolt	12.00 / 12.00	12.00 ⛰	12.00

MARK AS DONE ▸ CONFIRMED   IN PROGRESS   **DONE**

Operations & Work Center 5

Sharlene • Manufacturing Engineer

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?

You

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

Sharlene • Manufacturing Engineer

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

Manufacturing   Products ▸ Bills of Materials

Product	BoM Type
Table	Manufacture this product

Components	**Operations**	Miscellaneous

Operation

Add a line

Operation   Assembly

Work Center   Assembly Station ▾

Work Sheet
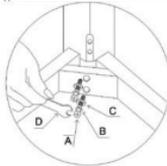
SAVE & NEW

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

Plan an Order

You

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

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

Sharlene • Manufacturing Engineer

I'll test the work center control panel at the same time.

Plan an Order

🔧 **Manufacturing**   Operations ▸ Manufacturing Orders   **CREATE**

Product	Table ▾
Quantity	1.00 Units ▾ **To Produce** 📈
Bill of Materials	Table ▾

CONFIRM   ▸   DRAFT **CONFIRMED** IN PROGRESS DONE

🔧 **Manufacturing**   Overview

Assembly Station ⋮

WORK ORDERS 👆

▸   **WH/MO/00002 - Assembly**
Table 1.00 Unit(s) 👆

← Table: 1.00   /1.00 Unit(s)   WH/MO/00002-Assembly

≡   **Pause**   **‹ Previous**   **Skip ›**   **✔ MARK AS DONE** 👆
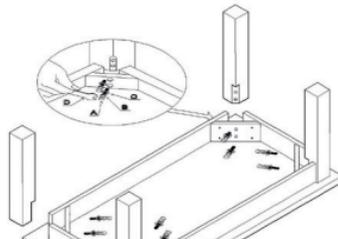
Continue the production by working on the order related to the **Painting work center** and mark it as done.

Rachel • After Sales Services

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

You

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

←

⊞ | 🖌️ **Quality** | Quality Control ▸ Control Points | **CREATE**

New

| Title | Torque Setting | Control Frequency | All ▾ |

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

Products	(Table ✕) ▾	**Type**	Measure ▾
Operations	(MyOff.: Manufact. ✕) ▾	**Norm**	13.00	Nm
Work Order Operation	Assembly ▾	**Tolerance**	from 11.00 to 15.00
		Worksheet	⦿ Scroll to specific page
		Worksheet Page	3

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

SAVE

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

⭐

Check your Quality Test

You

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

Sharlene • Manufacturing Engineer

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

You

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

Check your Quality Test

Manufacturing ▸ Operations ▸ Manufacturing Orders   **CREATE**

Product	Table ▾
Quantity to Produce	1.00 Units ▾ To Produce 📈
Bill of Material	Table ▾

CONFIRM ▸ | DRAFT | **CONFIRMED** | IN PROGRESS | DONE

Manufacturing   Operations ▸ Work Orders

Operation	Manufacturing	Status		
Assembly	WH/IN/00003	Ready	**Start** **Block**	
Painting	WH/IN/00003	Waiting for ano ...	**Start** **Block**	

Measure: 14.00   Nm   **VALIDATE**

✓ MARK AS DONE

Table - Units

Date	Operator	Title	Result	Status
01/18/2022 14:57:01	Admin	Torque Setting	14 Nm	Done

Control Cost

Anita • Accountant

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

You

Ok, I'll check the **Structure & Cost** on the Bill of Materials for theoretical costs if you want to update it.

Manufacturing	Products ▸ Bills of Materials

	Product	BoM Type
☐	Table	Manufacture this product

	☰ Structure & Cost

BoM Structure & Cost

Product	BoM	Quantity	Product Cost	BoM Cost
Table	Table	1.000	$ 115.00	$ 90.00
Table Top		1.000	$ 40.00	$ 40.00
Table Leg		4.000	$ 48.00	$ 48.00
Bolt		4.000	$ 2.00	$ 2.00
▸ Operations		62:27		$ 0.00
		Unit Cost	$ 115.00	$90.00

ⓘ As Anita doesn't have the user access rights for Manufacturing, you can send her a document with the details of the BoM.

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

Use *Barcodes*

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

This game requires any USB barcode scanner, or a 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   **1**

Set up your Product   **2**

Receive Products   **3**

Sell Products   **4**

Deliver Products   **5**

Adjust Inventory   **6**

Define Locations   **7**

Move Products   **8**

⭐ ⭐

Use Barcodes

Apps

Barcode
Use barcode scanners to process logistics operations.

INSTALL

ⓘ 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

Configure the Scanner

Paul • Secretary

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

You

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

Paul • Secretary

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

IT WORKS!

Configure the Scanner

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.
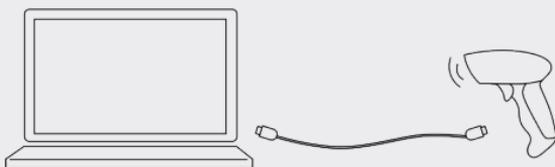
2 As the barcode scanner syncs with the keyboard, open any text editor to test it. **Scan the following barcode** to check the settings. With a smartphone, use any barcode or QR code scanner.

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

It works!

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

You

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

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

Sharlene • Manufacturing Engineer

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

Set up your Product

Inventory   Products   ▶ Products

Large Desk
Price: $ 220.00
On hand: 7.00 Units

Product Name

☆ Large Desk

| General Information | Variants | Sales | Purchase | Inventory |

Product Type   Storable Product   ▼   **Sales Price** $220.00

Cost $140.00

Barcode   DESK12345678

ⓘ

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

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.

Barcode

1 Initiate a receipt.

WH-RECEIPTS

2 Scan the product, 3 times.

DESK12345678

3 Validate the transaction.

O-BTN.validate

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

Brandon • Customer

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

You

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

Brandon • Customer

That's correct!

< **Sales** | Orders ▶ Quotations | **CREATE**

Customer _____ Azure Interior, Brandon ▼

| Order Lines | Optional Products | Other Info |

Product	Quantity	Unit Price	Taxes	Total
Large Desk	3.00 📊	220.00	15.00%	$ 660.00

Add a product   Add a section   Add a note

Untaxed Amount: $ 561.00

Taxes: $ 99.00

Total: $ 660.00

SEND BY EMAIL ▶ | QUOTATION | **QUOTATION SENT** | SALES ORDER |

CONFIRM ▶ | QUOTATION | QUOTATION SENT | **SALES ORDER** |

Sophia • Sales Manager

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

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

You

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

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

Deliver Products

		Inventory	Configuration ▸ Settings

Operations

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

		Barcode	**OPERATIONS**

Delivery Orders

1 TO PROCESS 🖑

▸

WH/OUT/00002 🖥 **Ready**
Azure Interior, Brandon   01/15/2022 🖑

1 ‖‖‖‖‖‖‖‖‖‖‖‖
DESK12345678

2 ‖‖‖‖‖‖‖‖‖‖‖‖
DESK12345678

3 ‖‖‖‖‖‖‖‖‖‖‖‖
O-BTN.pack

4 ‖‖‖‖‖‖‖‖‖‖‖‖
DESK12345678

5 ‖‖‖‖‖‖‖‖‖‖‖‖
O-BTN.pack

6 ‖‖‖‖‖‖‖‖‖‖‖‖
O-BTN.validate

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

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

Adjust Inventory

Roger • Inventory Manager

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

You

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

< 📦 Barcode **INVENTORY ADJUSTMENTS**

1 Scan 3 times

DESK12345678

2 Validate the inventory

O-BTN.validate

Define Locations

Roger • Inventory Manager

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

You

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

Roger • Inventory Manager

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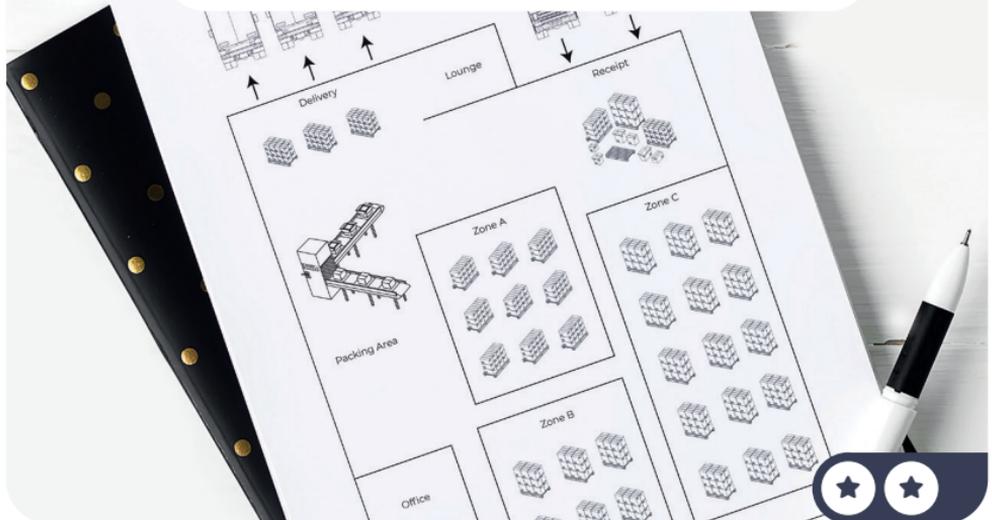
< | Inventory | Configuration ▶ Settings

Warehouse

☑ **Storage Locations** ❓
Track products location in your warehouse.

SAVE

Inventory | Configuration ▶ Locations | **CREATE**

ZoneA

Parent Location
WH/Stock ▾

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

Location Type Internal Location ▾ **Barcode** ZONEA

↻ Repeat this opeation to create the two other locations:
ZoneB • Internal Location • ZONEB
ZoneC • Internal Location • ZONEC

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

⭐

You

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

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

Sharlene • Manufacturing Engineer

Ok, I'm on it.

Move Products

  Barcode

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

WH-STOCK

2 Then, scan 3 times
the products you picked.

DESK12345678

3 Next, scan the destination shelf:
ZONEA.

ZONEA

4 Finally, validate it.

O-BTN.validate

Create *your App*

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

Install the Studio App to run the following business flow.

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

Create your App
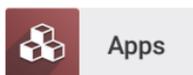
Apps

Studio

Create and customize your Odoo apps

INSTALL

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

Apps ✕ Studio

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

Admin

Initialize your App

1

Sophia • Sales Manager

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

You

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

Sophia • Sales Manager

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

Initialize your App

1

💬 🕐 🔧 👤 Admin ▾

⚙️ Settings

➕ New App

Create your App

Choose an app name

Office Rental

‹   ›

Design your Icon

Create your first Menu

Choose your first object name

Offices

✅ New model

Suggested features for your new model

- ✅ **Picture**
  Attach a picture to a record

- ✅ **Monetary value**
  Set a price or cost on records

CREATE YOUR APP ›

⭐

Design Office Form

You

> 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).

VIEWS **FORM**

+ **Add**

New Fields

N° **Integer**

Ab **Text**

▼ **Selection**

Name

Image

Label
Rent

~~Value~~

Capacity 0

Address

If you want to use existing contacts for the address, use a *Many2one* with the relation "Contact", instead of a *Text* field.

Type Open Space

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

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.

VIEWS **FORM**

Add a pipeline status bar

Field Properties

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

CONFIRM

AVAILABLE   LEASED   TO RENEW

Label

Status

CLOSE

You

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

Sophia • Sales Manager

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

Leased $ 65000

Chestnut
1450, Chestnut Street
Closed Space • 150 desks

Available $ 2000

Creekside
645 Creekside Drive
Open Space • 15 desks

Available $ 3500

Merriman
4597 Merriman Street
Open Space • 45 desks

Record your Offices

Office Rental   **CREATE**

AVAILABLE ▸ LEASED ▸ TO RENEW

Merriman

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

SAVE

Repeat this operation to create the two other offices.

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

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

Office Rental   Offices

Existing Fields ▶   ▼ Type   N° Capacity   ▼ Status

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

CLOSE

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

Add a Kanban view

Sophia • Sales Manager

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

You

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

Add a Kanban view

Office Rental   Offices

Views

Multiple Records Views

Activate View

Kanban
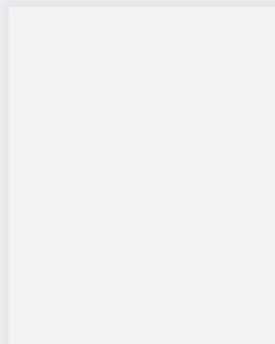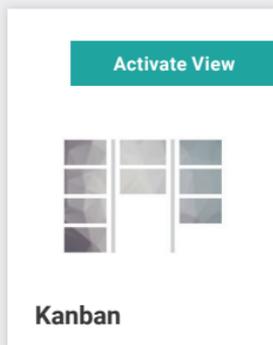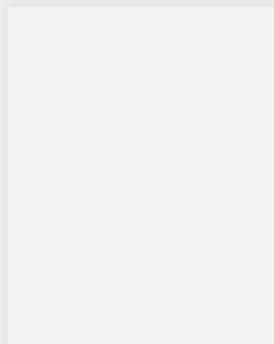
🖥 **View**

Add tags
Merriman
Add a Priority
Add an avatar

Default Group by

Status

Create Statistic reports

You

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

Sophia • Sales Manager

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

You

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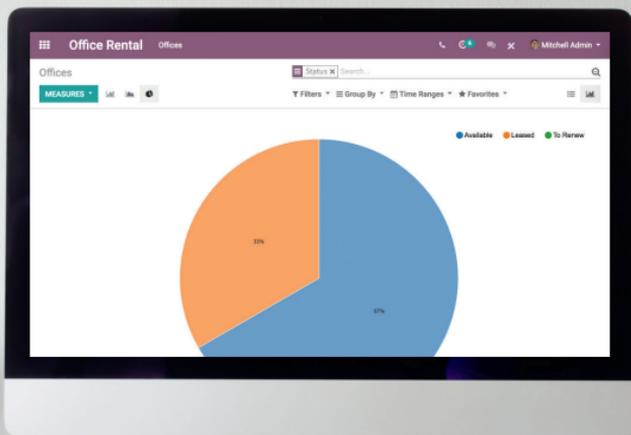
keep it simple.

Create Statistic reports
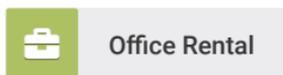
💼 **Office Rental**   Offices   🛠️

Views 👆

Reporting Views

ACTIVATE VIEW

Graph
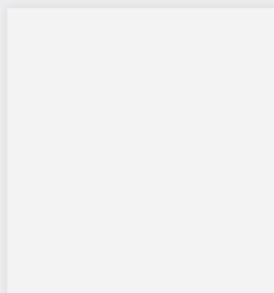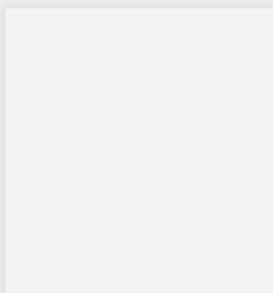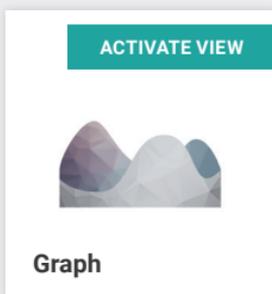
CLOSE

Offices

MEASURES ▼   📊 📈 🥧 👆

☰ **Group By ▾**

✓ **Capacity**
  Rent

Add Custom Group ▾

Status

APPLY

⭐

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

⭐ ⭐

Design a Report Template

Sophia • Sales Manager

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

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

You

Sure! I'll create the ad for you, directly from the **"Reports"** menu in the app.

Merriman

Merriman Street 4597

Rent
$ 3500.00

Type
Open Space

Capacity
45

Design a Report Template

Office Rental Offices

CREATE

Blank
No header/footer

Block

▶ **Field** ┄┄┄→ doc (Offices) ❯ Image

▶ **Field** ┄┄┄→ doc (Offices) ❯ Display Name

🪄 ▾ Heading1 ✎ ▾

Width 800 px **A** ▾

▶ **Field** ┄┄┄→ doc (Offices) ❯ Address

▶ **Field & Label** ┄┄┄→ Rent Type Capacity

Ab **Title Block** ┄┄┄→ ## About MyOffice Inc.

Ab **Text** ┄┄┄→ We are a team of passionate people whose goal is to improve everyone's life through disruptive products. We build great products to solve your business problems.

ⓘ

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

★