Your Story

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

A month later, your company (MyOffice Inc.) is incorporated! The next step is to recruit a great team. After a few interviews, you hire Sophia as Sales Manager, Marc as Purchase Manager, and Paul as Secretary.

You
CEO

Sophia
Sales Manager

Marc
Purchase Manager

Paul
Secretary

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

The first game, "Buy & Sell", will help you set up your B2B business: from buying new products to selling and delivering them to customers. Once these processes are in place, you can choose between 9 other scenarios to develop your strategy, including:

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

Good luck with your new business!

Game Rules

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

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

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

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

Your Score

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

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

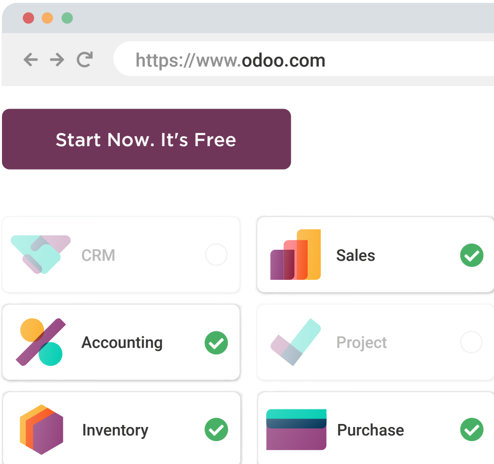
Buy & Sell

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

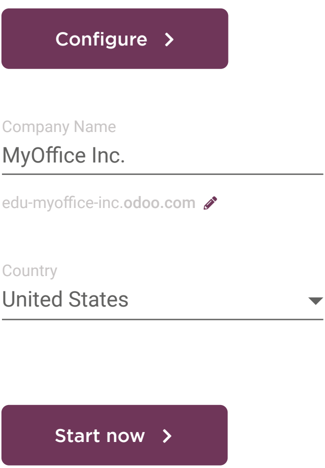
Create your company's database on www.odoo.com through the **"Start Now. It's free." button** and **select the Apps** required for the following business flow:

Create a product	1
Purchase large desks	2
Receive products	3
Control the bill	4
Sell products	5
Deliver to customer	6
Invoice customer	7
Record payment	8
Analyze profits	9

Install the apps



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



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

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

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

Buy & Sell

Create a product

1

Marc • Purchase Manager

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

You

How much do they cost?

Marc • Purchase Manager

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

You

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

Create a product

1

Purchase | Products ▸ Products | New

Product Name

☆ **Large Desk**

General Information | Sales | Purchase

Product Type ● Goods ○ Service ○ Combo

Sales Price $ 220.00

Invoicing Policy? Ordered quantities

Cost $ 140.00

Track Inventory ☑

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

Buy & Sell

Purchase large desks

2

You

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

Sophia • Sales Manager

Between 9 and 12.

You

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

Purchase large desks

2

Purchase **Orders** ▸ Requests for Quotation **New**

Vendor Wood Corner

Products | Other Information

Product	Quantity	Unit Price	Taxes	Subtotal
Large Desk	10.00	100.00	15%	$ 1,000.00

Add a line

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

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

This button takes you directly to the Receipt document.

Receipt 1

Buy & Sell

Receive products

3

Incoming Call...

Hello, I’m the driver from Wood Corner.

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

You

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

Receive products

3

Inventory

Receipts

1 To Receive

Reference	Contact	Status
WH/IN/00001	Wood Corner	Ready

WH/IN/00001

Receive From Wood Corner **Source Document** P00001

Operations | Additional Info | Note

Product	Demand	Done
Large Desk	10.00	10.00

If you don't enter the quantity received in the "Done" column, Odoo asks you to confirm that you want to validate all ordered quantities.

Validate | Draft | Waiting | Ready | **Done**

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

Receive products

Receipt
1

Buy & Sell

Control the bill

4

Paul • Secretary

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

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

Wood Corner

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

MyOffice Inc

1725 Slough Avenue
Scranton PA, 18540
United States

Invoice 2022/0123

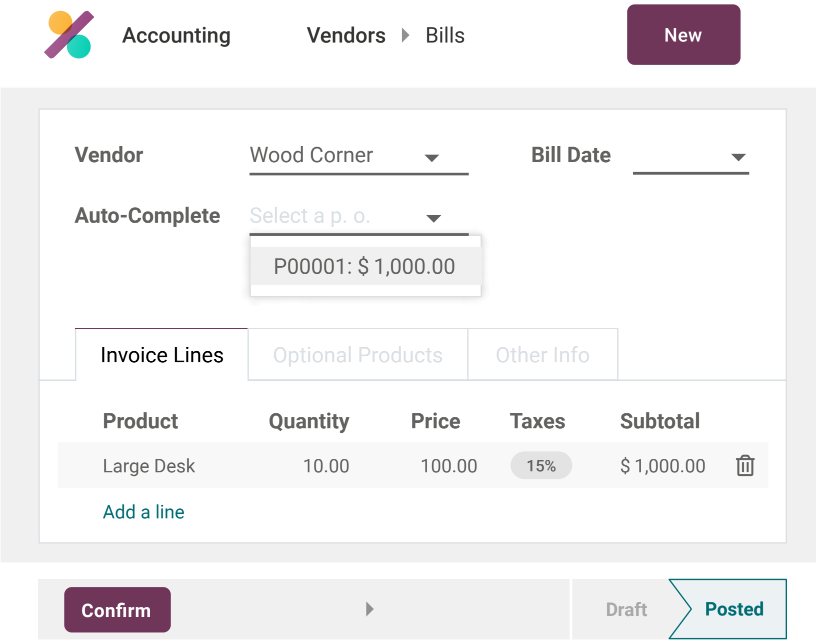
Description	Quantity	Unit Price	Amount
Large Desk	10.00	$ 110.00	$ 1,100.00

Subtotal	$ 1,100.00
Tax	$ 165.00
Total	$ 1,265.00

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

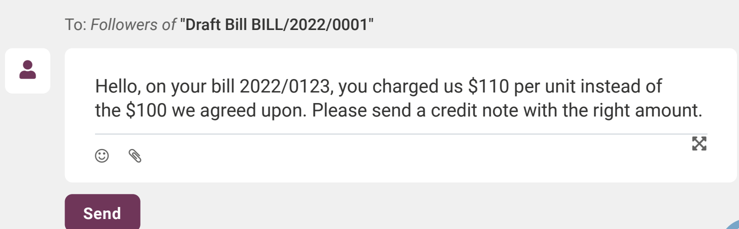
Payment terms: **2 months**

Control the bill 4



Bonus Point • There is a difference between the bill auto-completed by Odoo ($1,000.00) and the vendor bill ($1,100.00). When this happens, you usually send a message to the vendor. You get an extra ★ if you noticed it (even if you did not send the message).

You can generate a credit note directly from the related invoice. To do so, go to **Accounting** ▸ **Vendors** ▸ **Bills**, open the related bill, and click on **Credit Note**.



Buy & Sell

Sell products

5

Brandon • Customer

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

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

You

You'll get it by email right now!

Brandon • Customer - 1 hour later

Hello, it's Brandon.
I **confirm** the quote. I'm waiting for delivery impatiently!

Sell products 5

Sales Orders ▸ Quotations **New**

Customer Azure Interior, Brandon

Order Lines | Optional Products | Other Info

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

Add a product Add a section Add a note

Send by Email ▸ Quotation | **Quotation Sent** | Sales Order

Configure your document layout

Layout Light Boxed Bold Stripped

Background Blank

Text Lato

Logo WOOD CORNER

Wood Co
1164 Ca
White Ta
United St
accounti

Quotation #S0001

Continue **Discard**

Confirm ▸ Quotation | Quotation Sent | **Sales Order**

This button takes you directly to the Delivery Order.

Delivery 1

Buy & Sell

Deliver to customer

6

Roger • Inventory Manager

I'm in a meeting this morning.

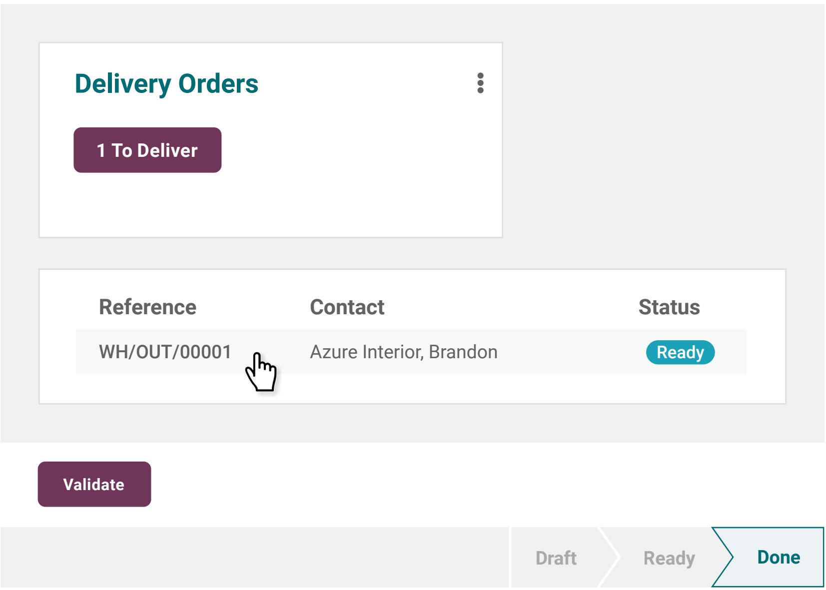
Can you process and **validate the delivery orders** that are ready to be shipped today?
Make sure that the one from **Azure Interior** is shipped.

You

Okay, I'll check this right away!

Deliver to customer 6

Inventory



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.

Invoice customer

7

Anita • Accountant

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

You

I'm on it!

Invoice customer 7

Sales   To Invoice ▸ Orders to Invoice

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

Create Invoice

Create Invoice ◉ Regular invoice

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

Create Draft

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

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

Confirm   Draft ▸ **Posted**

Buy & Sell

Record payment

8

Inbox (1)

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

You

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

$759.00 from Azure Interior,
Communication : "INV/2022/00001 - 3 Large Desks"

Record payment

8

Accounting

Customers ▸ Invoices

Customer	Total	Status
Azure Interior, Brandon	$ 759.00	Not paid

Pay

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

Journal Bank

Amount $759.00

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

Create Payment

Draft | **Posted**

IN PAYMENT

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

Buy & Sell

Analyze profits

9

You

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

Anita • Accountant

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

Analyze profits

9

Accounting Reporting ▸ Profit and Loss

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

/profit

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

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

Congratulations!

What's next? Choose your strategy:

Run a Store
Start selling in your showroom.

Digitalize Accounting
Manage your invoices, bills and more...

Manufacture
Build your own products.

Sell Online
Create an eCommerce website.

Run *a Store*

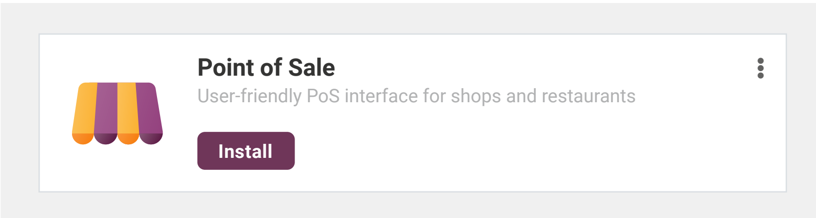
To grow your business, you plan to launch a showroom for B2B customers, and a shop for B2C customers, where they can test and buy products directly.

Install the Point of Sale app.

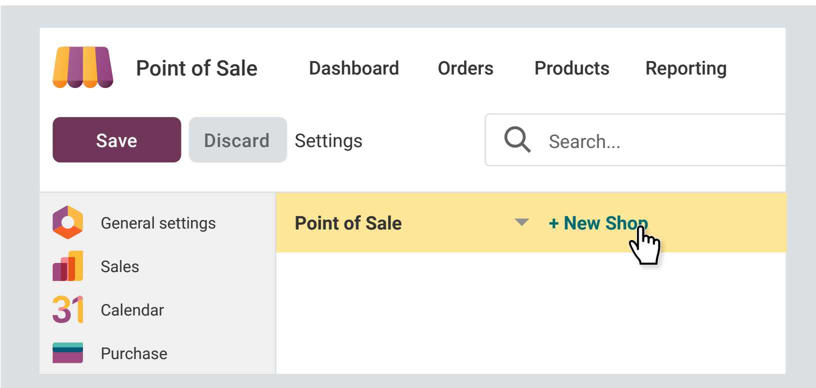
Import products	1
Configure cash control	2
Sell 3 Office lamps	3
Cash out money	4
Sell with an invoice	5
Return 1 Office lamp	6
Control cash	7
Analyze the POS sales	8

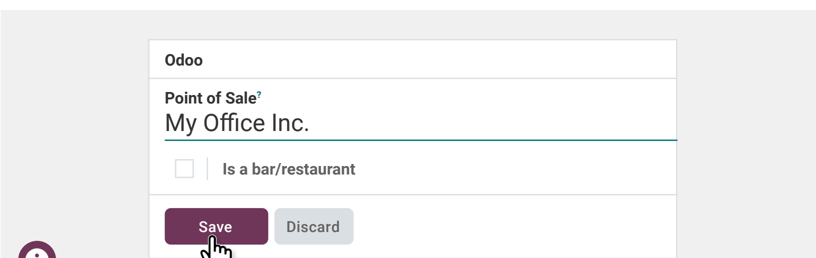
Install the apps

Apps



Point of Sale **Configuration ▸** Settings





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

Run a Store

Import your products

1

You

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

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

Roger • Inventory Manager

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

You

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

Import your products

1

Point of Sale   Products ▸ Products ▸ ⚙

Import records

...

Upload Data 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*	External ID
Name *Acoustic Block Screens*	Name

Import

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

General Information | Sales | Point of Sale | Purchase

To Weigh Whith Scale? ☐

Category? Desks

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

Chairs | Desks | Misc

Run a Store

Configure cash control

2

You

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

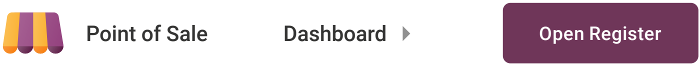
Sure. I can give you $550.

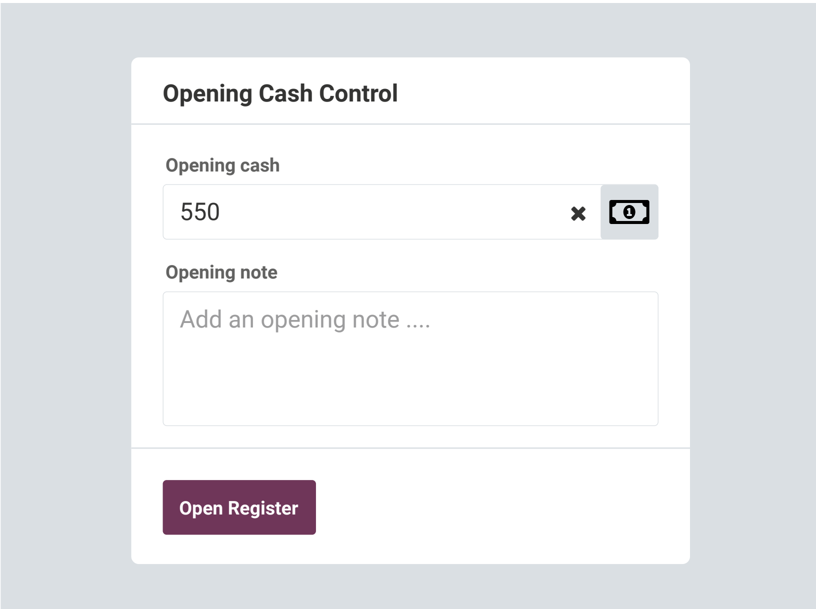
Great! I'm **opening a new session** with this.

x10 x2 x1 x1 x2 x4

Configure cash control

2





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

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

Run a Store

Sell 3 Office lamps

3

Mike • Customer

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

You

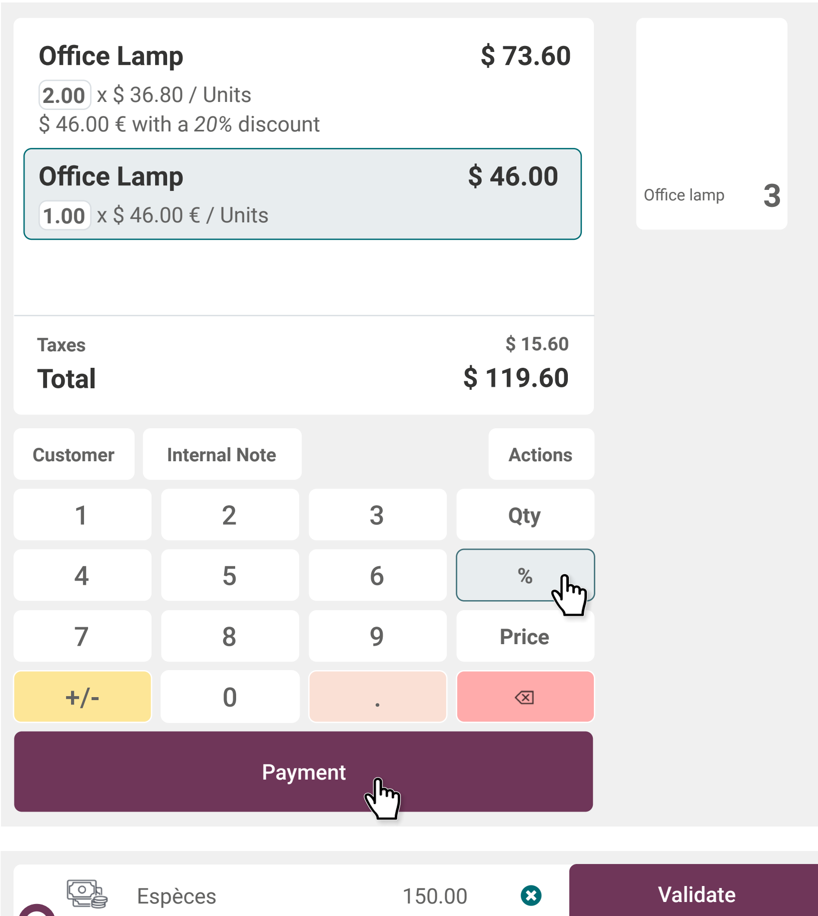
Good! With today's special offer, when buying 2 identical items, you **get a 20% discount** on both.

Mike • Customer

Great! I'll pay in **cash**. Here is **$150**.

Sell 3 Office lamps

3



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

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

Run a Store

Cash out money

4

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

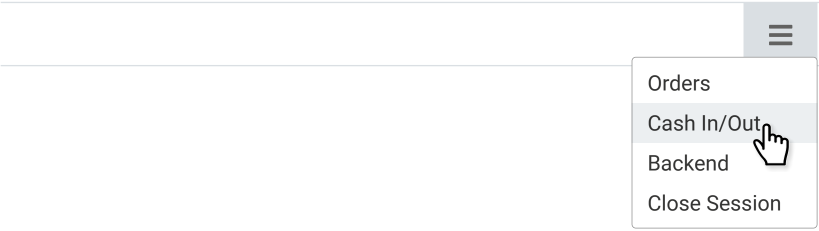
The delivery guy is here and I'm **$12** short to pay the order.
Can you help me out with a **Cash Out**?

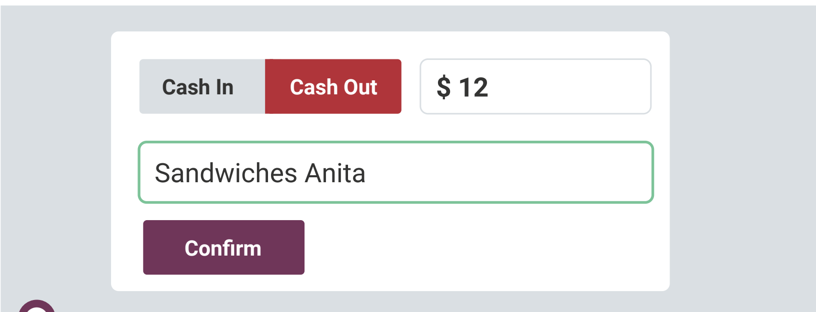
You

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

Cash out money

4





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

Run a Store

Sell with an invoice

5

Jennie • Customer

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

You

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

Jennie • Customer

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

I’ll **pay cash**. Here is $200.

Sell with an invoice

5

Customer

Internal Note

Actions

1 2 3 Qty

4 5 6 %

7 8 9 Price

+/- 0 .

Payment

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

Whiteboard 1

Payment

Jennie Fletcher

Invoice

1 2 3 +10

4 5 6 +20

7 8 9 +50

+/- 0 .

Back

Validate

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

You can print the receipt by clicking on **Print full receipt**

Run a Store

Return 1 Office lamp

6

Mike • Customer

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

You

Sure, no problem!

Return 1 Office lamp

6

New Order ▸ Actions ▸ Refund

Receipt Number	Total	Status
Order 00001-001-0002	$ 115.00	Paid
Order 00001-001-0001	**$ 119.60**	**Paid**

Office Lamp
1.00 x 46.00 € / Units ▸ 1 ▸ Refund

Payment ▸ Cash -46.00 € ▸ Validate

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

Office Lamp $ -46.00
-1.00 x $ 46.00 / Units

Gift Card $ 46.00
1.00 x $ 46.00 / Units
Sell physical gift card?

Total: $ 0.00

Control cash

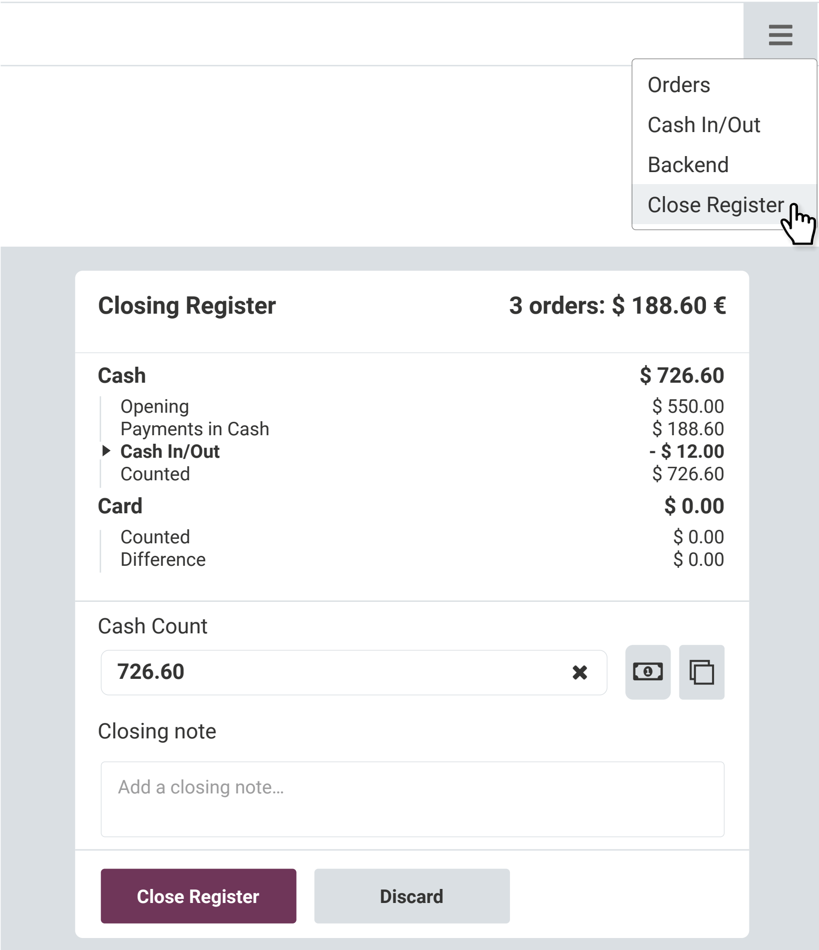
You

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

Dave • Showroom Salesman

I'm on it!!

Control cash 7



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

Run a Store

Analyze the POS sales

8

Anita • Accountant

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

You

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

Analyze the POS sales

8

Backend

Reporting ▸ Sales Details

Sales Details

Start Date: *Yesterday's date*

End Date: *Today's date*

Print

Daily Sales Report Z

Session ID: POS/00001
07/28/2023 12:17:41 - 07/28/2023 12:24:46

Sales

Product Category	Product	Quantity	Total (VAT excluded)
		4.0	620.00€
	[FURN_0003] Office Lamp	2.0	320.00€ Disc: 20.0%
	[FURN_0003] Office Lamp	1.0	200.00€
	[FURN_0009] Whiteboard	1.0	100.00€
Total		**4.0**	**620.00€**

Taxes on sales

Name	Tax Amount	Base Amount
21%	130.20€	620.00€
Total	**130.20€**	**620.00€**

Refunds

Product Category	Product	Quantity	Total (VAT excluded)
		-1.0	-200.00€
	[FURN_0003] LED Lamp	-1.0	-200.00€
Total		**-1.0**	**-200.00€**

Taxes on refunds

Name	Tax Amount	Base Amount
21%	-42.00€	-200.00€
Total	**-42.00€**	**-200.00€**

Payments

Name	Total
Cash	508.20€

Discounts:

Number of discounts: 1

Sell *Online*

Locally, the MyOffice brand is recognized for its quality and service. It's time to go global and establish a web presence to showcase your great products. You plan to set up an eCommerce store where customers can view your catalog, customize products, buy online, and track their orders.

Install the eCommerce App and configure an "Online shop" for an **office furniture business.**

Design your homepage	1
Improve SEO	2
Create a product page	3
Set up a product configurator	4
Test your ecommerce	5
Cross-sell to customers	6
Write a blog post	7

Install the app

Apps

eCommerce
Sell your products online
Install

Let's do it

I want *an online store* for my *furniture accessories supplier* business with the main objective to *develop the brand.*

You can choose a pre-made palette.

News
Blogging and posting relevant contant

Build my website

Select your favorite theme.

Sell Online

Design your homepage

1

You

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

Sophia • Sales Manager

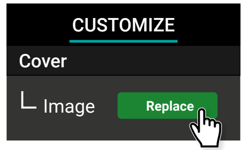
I like websites with a **cover at the top**, customized with an office **image** as the background.

I would add some content with key numbers like **700+ happy customers, 120+ designed products**, and **4-year guarantee**. I would love to see a **gradient** in the background of this block.

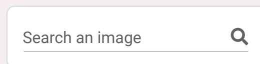
Then, we can add 3 columns: "**You Customize**", "**We Design**", and "**We Manufacture**".

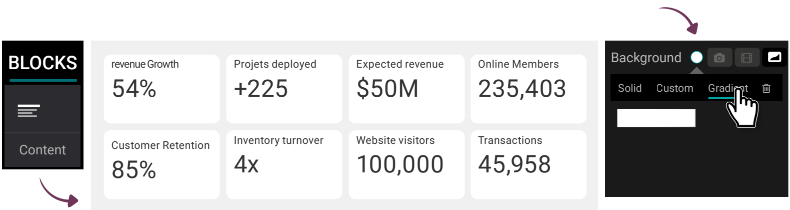
Design your homepage

1

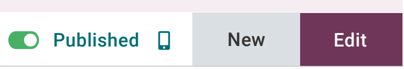


When searching for an image, Odoo suggests illustrations and pictures free of charge.





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



Sell Online

Improve SEO

2

Sophia • Sales Manager

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

You

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

The promote tool will help us to understand what needs to be changed on our product page in order to improve the SEO.

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

Improve SEO

2

Website Site ▸ Optimize SEO

Title ?

Desk Manufactured on Demand

Description ?

Preview

Desk Manufactured on Demand

https://myoffice-inc.odoo.com/

The description will be generated by search engines based on page content unless you specify one.

Keywords

Desks | English (US) | **Add**

Keyword	H1	H2	T	D	C	Related keywords
Desks	✓				✓	for sale, near me, for home office, with drawers, for small spaces, deskspacing

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

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

Sell Online

Create a product page

3

Sophia • Sales Manager

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

You

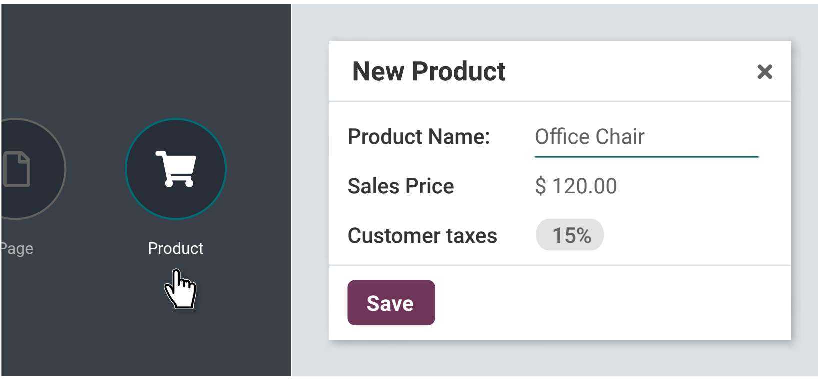
Ok, I'll **create the product page** on the website with a **$120 price tag**.

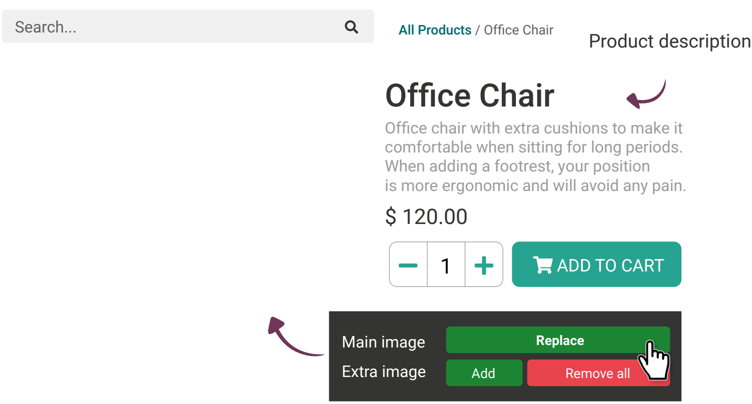
Sophia • Sales Manager

Perfect, and don't forget to **add a description** on the chair. For this, get inspired from the results from the **Optimize SEO** pop-up.

Create a product page

3





Sell Online

Set up a product configurator

4

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

You

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

What are the options?

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

Set up a product configurator 4

Website Configuration ▸ Settings

Product Catalog

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

Save

Website Products ▸ Products ▸ Office Chair

Office Chair

General Information | Attributes & Variants | Sales

Attribute	Values
Material	Fabric, Leather
Color	

Create "Color"
Create and edit

Attribute Name Color

Display Type Color

Attribute Value

Value	Is custom value
Grey	☐

Sell Online

Test your ecommerce

5

You

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

Sophia • Sales Manager

Sure!

Test your ecommerce 5

Go to Website

Office Chair

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

$ 120.00

COLOR

MATERIAL

Fabric Leather

1 Add to cart

1

Review Order > Shipping > Payment

Office Chair

Remove

1

$ 120.00

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

Checkout >

Review Order > Shipping > **Payment**

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

Sell Online

Cross-sell to customers

6

Sophia • Sales Manager

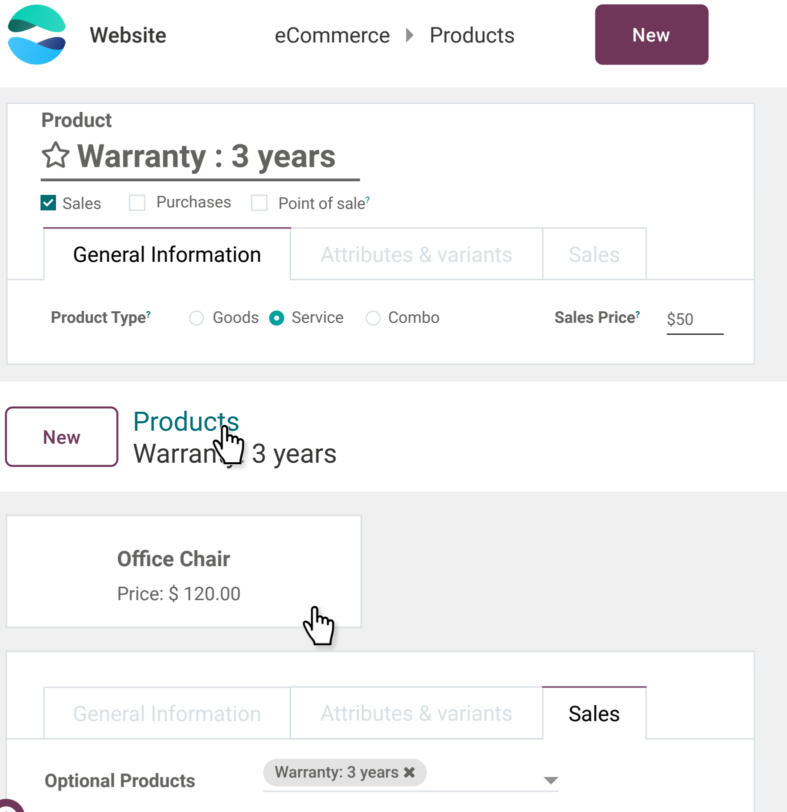
Last month, we made $350k in revenue through the website, with an average cart size of $250. Can we cross-sell to customers by suggesting **optional** products?

You

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

Cross-sell to customers

6



Once the product is set up, test it by adding a chair to your cart. You should see a popup offering you the option to add a warranty. You can use this cross-selling strategy by suggesting accessories and optional products. Upselling is also possible, by using alternative products.

Sell Online

Write a blog post

7

Sophia • Sales Manager

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

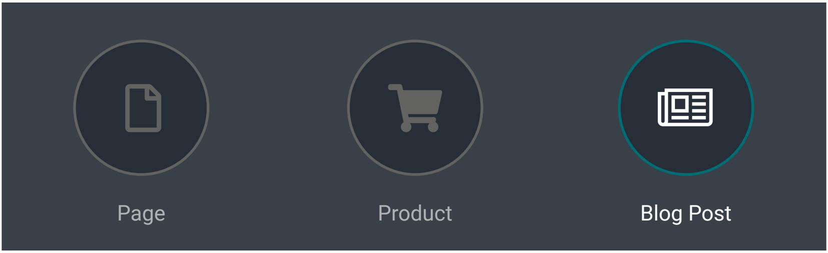
You

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

Write a blog post 7

Website

New

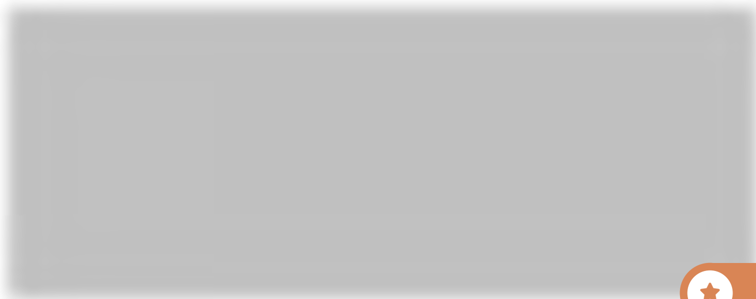


New Blog Post

Select Blog	News
Title	New warranty service

Save

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



Digitalize *Accounting*

Your business is booming and so is your paperwork! After analyzing the time and effort you spend on managing and archiving invoices, you decide to go paperless. So you plan to digitize all invoices to become more efficient and save office space.

Install the App Documents.

Download and **import** vendor bills 1

Validate vendor bills 2

Connect your bank 3

Record and **reconcile** bank transactions 4

Analyze the partner ledger 5

Analyze the profit and loss statement 6

Generate the tax return
(only within the European Union) 7

Download the App

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

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

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

Digitalize Accounting

Download and **import** vendor bills

1

Paul • Secretary

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

You

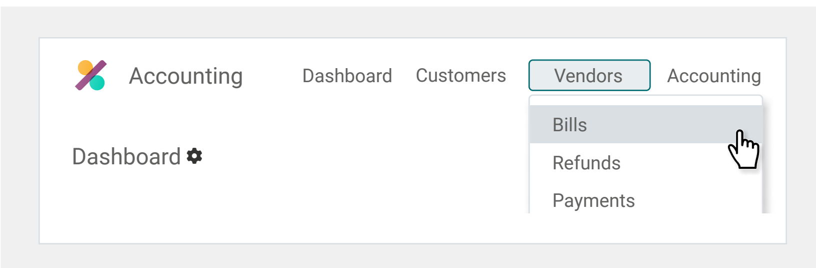
Yes, thank you! I'll **download** them and then **import** them into the **Accounting App**.

Download and **import** bills

1

Accounting

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



Upload

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

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

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

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

Digitalize Accounting

Validate vendor bills

2

You

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

Anita • Accountant

I'm on it.

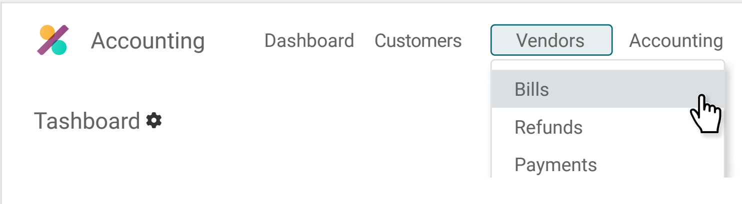
You

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

Don't forget to check the automatically generated entries. **Select** the right expense and revenue **accounts**: one for **liability insurance**, one for **rent** and one for **equipments**.

Validate vendor bills

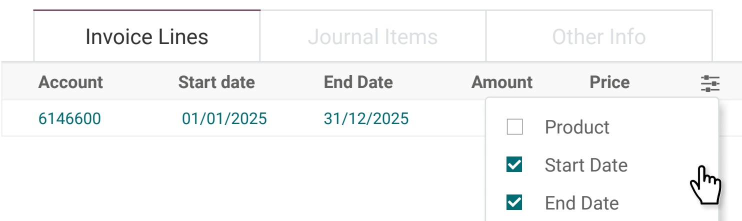
2



Vendor	Bill date	Reference	Tax Exluded	Status
ReadyMat	08/01/2025	**Bill 784**	$ -413,22	Draft
Simply Business	01/01/2025	**INV/2025/00001**	$ -984,00	Draft
Big Tower	01/01/2025	**785**	$ -1.500,00	Draft
			$ -2.897,22	

You need to enable the option to specify a start date and an end date so that Odoo can automatically allocate the expense to the relevant months.

Don't forget to check the charging accounts.



Account	Start date	End Date	Amount	Price
6146600	01/01/2025	31/12/2025		

Deferred Entries

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

Digitalize Accounting

Connect your bank

3

You

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

Anita • Accountant

Yes, I'll take care of it.

Connect your bank

3

Accounting Dashboard

Bank

Connect your bank. Match invoices automatically.

Search over 36000 banks

BANK OF AMERICA

Revolut

Search for an institution

Odoo bank

Locally

Worldwide

Odoo Bank Sync Demo via Odoo (Free)

Your Account Type

- Business
- Personal
- Corporate

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

Connect **Cancel**

Proceed ▸ **Connect Bank**

Digitalize Accounting

Record and **reconcile** bank transactions

4

You

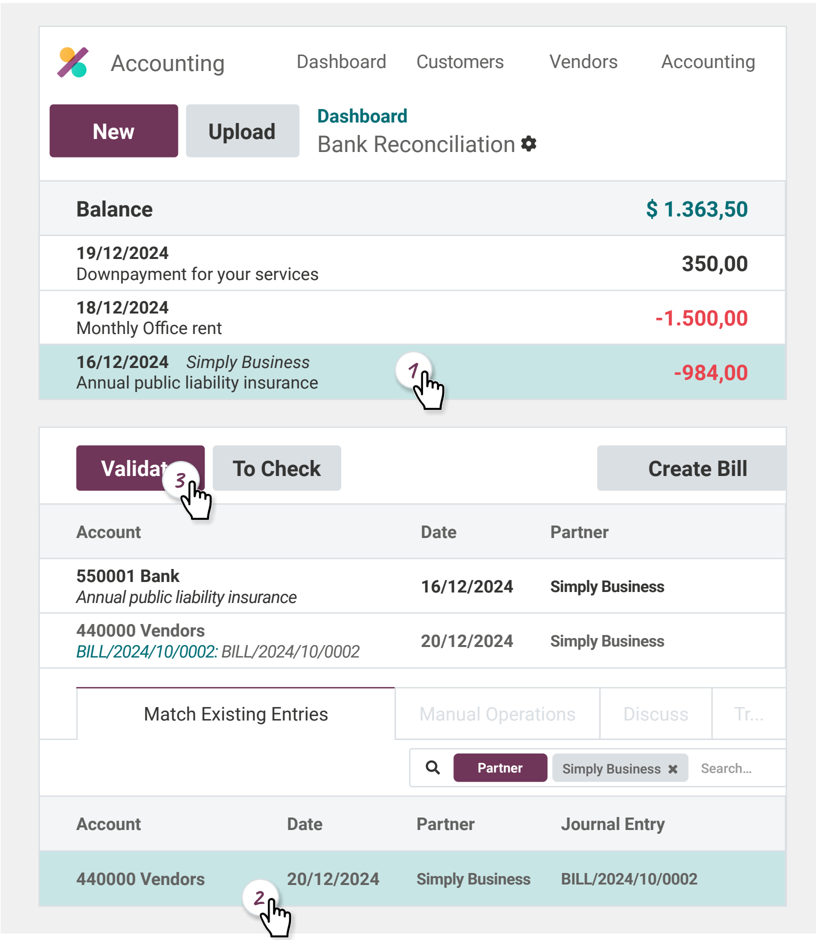
Did the connection to the bank go smoothly?

Anita • Accountant

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

Perform bank reconciliation 4

Accounting



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

Analyze the partner ledger 5

You

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

Anita • Accountant

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

Analyze the partner ledger 5

Accounting Reporting ▸ Partner Ledger

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

	Journal	Account	Invoice Date	Due Date	Matching	Debit (.€)	Credit (.€)	Amont Currency	Balance ($)
Big Tower Group						$ 1,500.00	$ 1,500,00		$ 0.00
Brandon						$ 759.00	$ 350,00		$ 409.00
Readymat						$ 500.00	$ 500,00		$ 0.00
Simply business						$ 984.00	$ 984,00		$ 0.00
Wood Corner						$ 0.00	$ 1,150.00		$ -1,150.00
Total						**$ 3,743.00**	**$ 4,484.00**		**$ -741.00**

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

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

Digitalize Accounting

Analyze the profit and loss statement 6

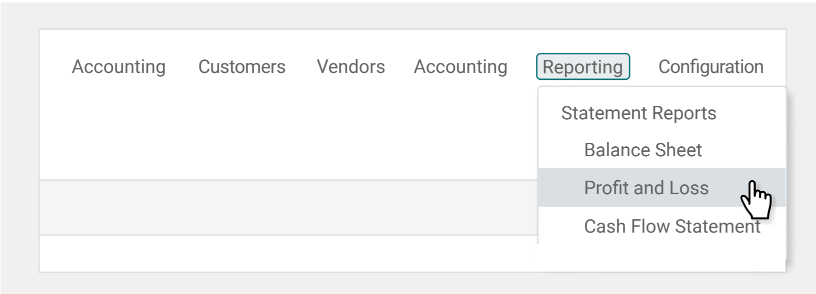
You

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

Anita • Accountant

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

Analyze the profit and loss statement 6



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

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

Revenue	660.00
Less Costs of Revenue	0.00
Gross Profit	**660.00**
Less Operating Expenses	2,938.28
Operating Income (or Loss)	**-2,278.28**
Plus Other Income	0.00
Less Other Expenses	0.00
Net Profit	**-2,278.28**

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

Digitalize Accounting

Generate the tax return

7

You

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

Anita • Accountant

Are you sure all the bills have been entered correctly?

You

Yes, I've checked, everything is fine.

Anita • Accountant

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

You

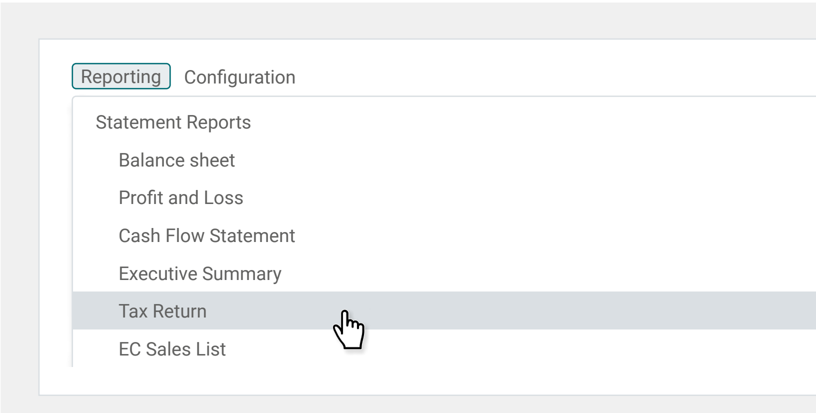
Could you tell me where we stand?
Do we need to plan for a VAT payment, or are we entitled to a VAT refund?

Anita • Accountant

Sure!

Generate the tax return

7



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

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

Sell *Services*

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

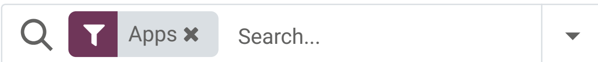
Install the 2 Apps required for the new office design project. It will follow this business flow:

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

Install the apps

Apps

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



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

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

Sell Services

Set up a project

1

You

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

Audrey • Interior Designer

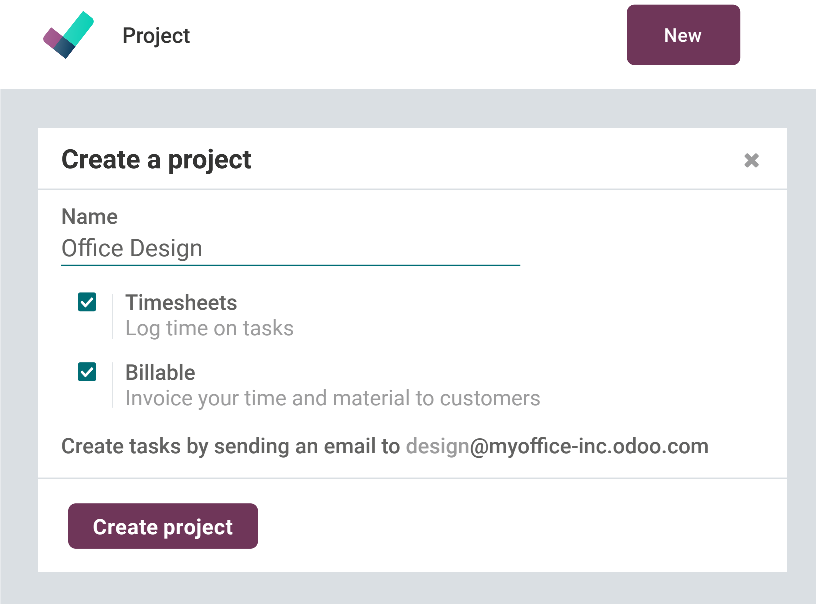
I start with a first **interview** to identify the customer's needs. Then I schedule an **on-site** visit to examine their premises and necessary measurements.
On this basis, I draw up a **floor plan**. Finally, we move on to execution of the **work**.

You

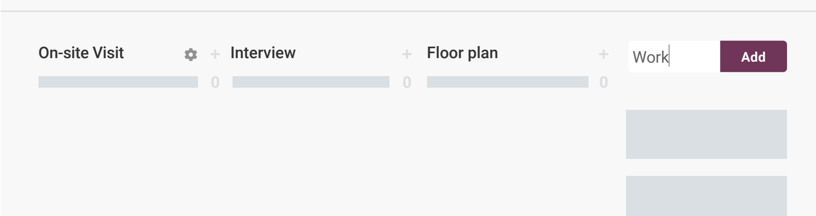
Ok, thanks. I'll **create the stages** and also set the email address "**design@**" on the project, to ease the creation of tasks and so customers have a direct contact.

Set up a project

1



You can configure an email address for your project. A task will be created automatically in this project when you send an email to this address.



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

Configure a product

Sophia • Sales Manager

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

You

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

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

Configure a product

2

Sales | Products ▸ Products | **New**

Product

☆ **Office Design Service**

☑ Sales ☐ Purchase ☐ Point of Sale

General Information | Attributes & Variants | Sales

Product Type ○ Goods ◉ Service ○ Combo

Sales Price $ 50

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

Create on Order	Task
Project	Office Design
Invoicing policy	Based on Timesheets

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

Sell Services

Sell the design service

3

Sophia • Sales Manager

I just confirmed our first quotation for "**The Jackson Group**"! We sold an **Office Design Service**, estimated at **20 hours**. The customer was amazed by our offer and **confirmed the order** right away!

You

Awesome! **Check if the task has been created** automatically. Assign it to Audrey.

Sell the design service

3

Sales   Orders ▸ Quotations   New

New

Customer The Jackson Group

Create "The Jackson Group"

Order Lines | Optional Products | Other Information

Product	Qty	Unit Price	Taxes	Subtotal
Office Design Service	20.00	50.00	15%	$ 1,000.00

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

Confirm ▸ Quotation | Quotation Sent | **Sales Order**

A task has been generated automatically with this Sales Order. Navigate easily thanks to the links on the top of the screen.

Projects 1 | Tasks 0 / 1 (0%) | Recorded 0 Hours

S00002 - Office Design Service

Project Office Design

Assignees Audrey

Tags Create and edit...

Sell Services

Schedule a meeting

4

You

You should have a new task for “The Jackson group” under the Office Design project. Can you schedule the **first interview**?

Audrey • Interior Designer

Sure! First, I’ll **star the task** as a priority.

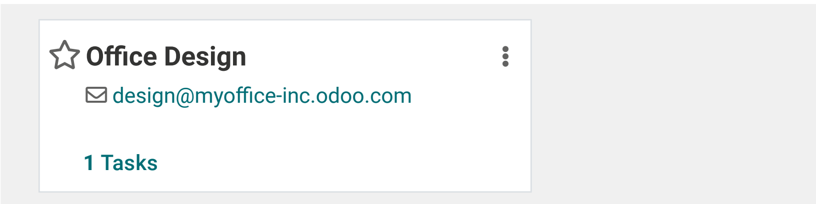
Once the first meeting is over, I **make an appointment** with the customer for an on-site visit next week.

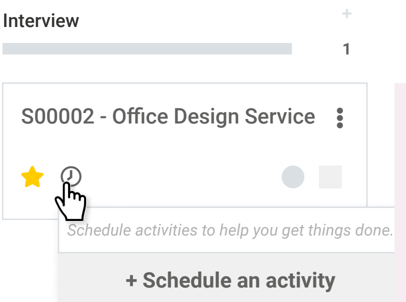
Finally, I don't forget to move the task to the appropriate column.

Schedule a meeting

4

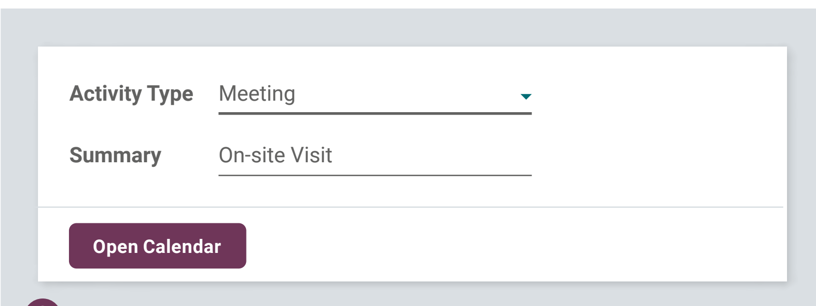
Project





Click on ● to mark the task as:

- In progress
- Changes requested
- Approved
- Canceled
- Done



Click *Open Calendar* to schedule the meeting directly from your agenda.

You can also schedule a meeting from the chatter of the task.

Activities

Sell Services

Record timesheet

5

You

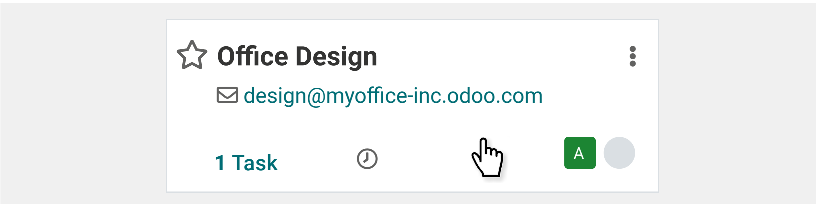
Audrey, as we charge customers based on hours spent, don’t forget to record your **timesheet on the task.**

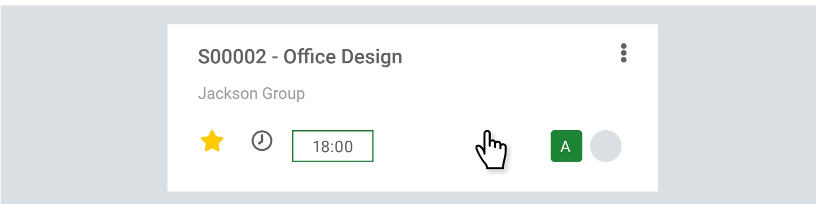
Audrey • Interior Designer

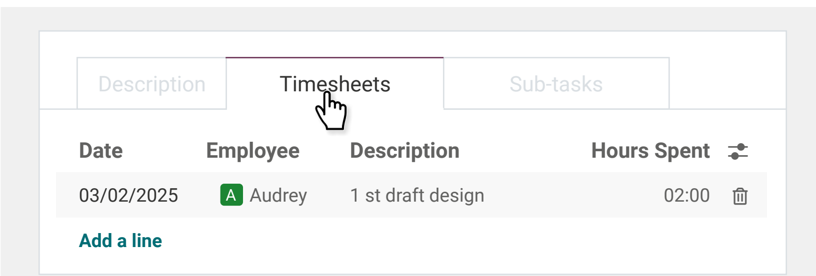
Ok, I’ve been **working on the design** for the past **2 hours**. I’ll **log the time** I spent and **move the task** to the appropriate column.

Record timesheet 5

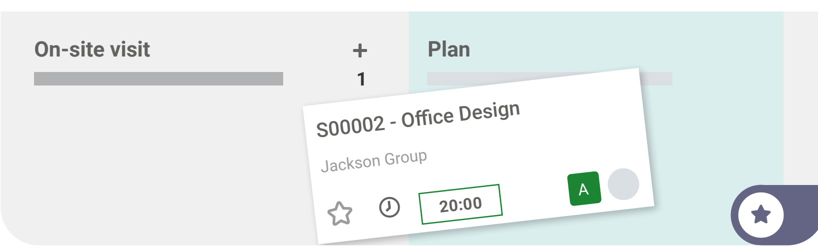
Project







If you want to save your timesheets yourself, you can do so in the Timesheets app by clicking the **START** button.



Sell Services

Plan the work

6

I just had The Jackson Group on the phone. They validated the design! They've confirmed that we can in 2 weeks.

I will split the onsite work into **2 sub-tasks**. One will be for **painting walls and floors**, and the other for **installing furniture**.

Good idea!

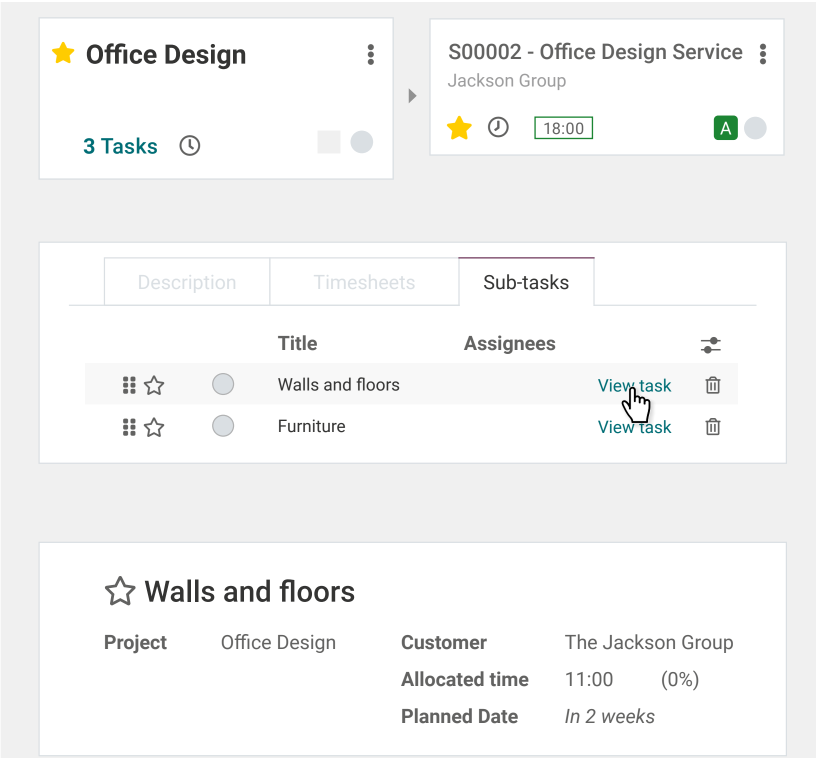
I will **allocate 11 hours** (1.5 days) for **walls and floors** and **7 hours** (1 day) for the **furniture** task.

You

You can set up the **planned dates** at the same time. And don't forget to **move** the Jackson Group **task to the "Work" stage**.

Plan the work 6

Project



Bonus Point • Get an extra ★ if you have added the allocated hours on both subtasks.

Sell Services

Timesheet on substasks

7

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

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

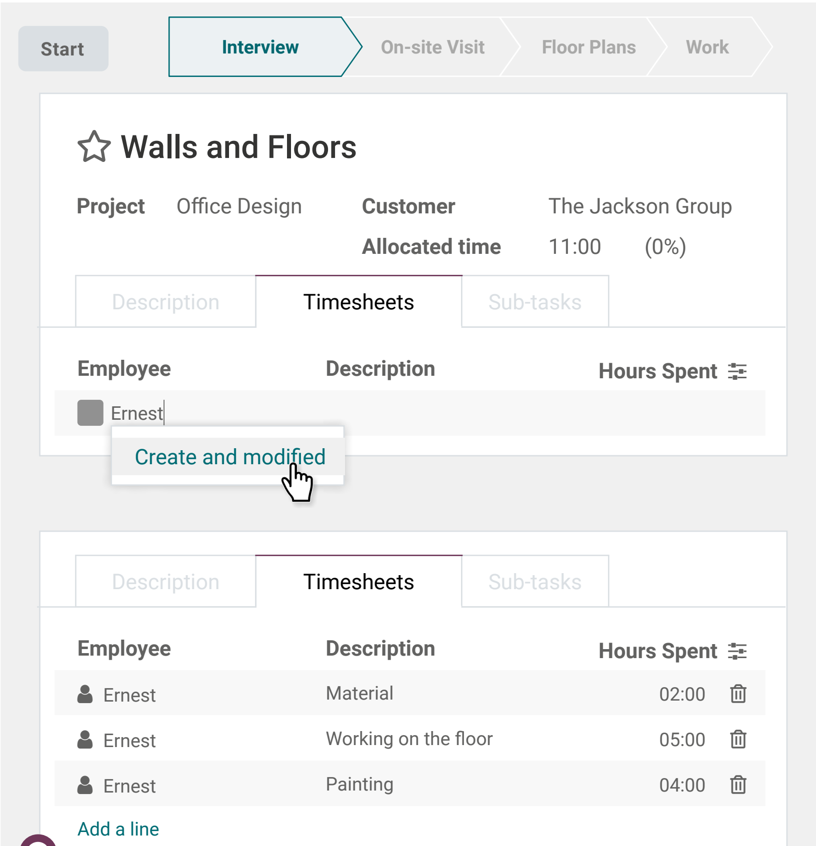
Yesterday, we spent **7 hours** assembling and placing the **furniture** according to the plan!

You

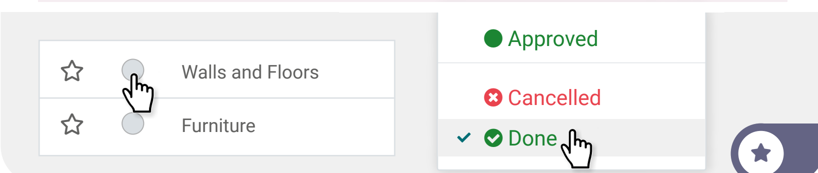
Great! Don't forget to **timesheet all the jobs** and to mark the **subtasks as Done**!

Timesheet on subtasks

7



Remember that there is 2 ways to record timesheets. Do it directly from the **Project** app by going to the **Timesheets tab** in your tasks or open the **Timesheets app**. If you make a mistake, you can always edit the time spent.



Sell Services

Invoice customer

8

Anita • Accountant

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

You

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

keep it
simple.

Invoice customer 8

Sales

To Invoice ▸ Orders to Invoice

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

Create Invoice

Create Invoice ◉ Regular invoice

Create Draft

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

Confirm ▸ Draft Posted

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
Set up operations & work centers	5
Plan a manufacturing order	6
Add a quality check	7
Check your quality test	8
Control cost	9

Install the apps

Apps

Manufacturing
Manufacturing Orders & BOMs
Install

Apps

Quality
Control the quality of your products
Install

Manufacturing   Configuration ▸ Settings

Operations

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

Manufacture

Define the bill of materials

1

Ronnie • Head of Engineering

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

You

Looks good!
I'll **create the 4 products** in the system (the **table** and its components) and the **Bill of Materials** according to your plan.

Define the bill of materials

1

Manufacturing Products ▸ Products **New**

Product?

☆ **Table**

☑ Sales? ☐ Purchase? ☐ Point of Sale?

General Information | Sales | Inventory | Accounting

Product Type? ● Goods ○ Service ○ Combo

Sales Price? $ 330.00

Cost? $ 115.0

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

General Information | Sales | Inventory | Accounting

Routes ☑ Manufacture

0 Bill of Materials ▸ **New**

The BoM is also accessible from the menu **Products ▸ Bills of Materials**

Product Table

Quantity 1.00

BoM Type ● Manufacture this product

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

Manufacture

Purchase raw materials

2

You

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

Only Woods Inc. • Sales Representative

Sure. Here is our offer.

You

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

Purchase raw materials

2

Purchase

New

Vendor Only Woods Inc.

Products | Other Information

Product	Quantity	Unit Price	Taxes	Subtotal
Table Top	100.00	40.00	15%	$ 4,000.00
Table Leg	400.00	12.00	15%	$ 4,800.00
Bolt	400.00	0.50	15%	$ 200.00

Untaxed amount:	$ 9,000.00
Tax 15%:	$ 1,350.00
Total:	**$ 10,350.00**

Taxes depend on countries. Depending on the accounting package installed, you might not have the same tax rate as the one in the example.

Confirm Order | RFQ | RFQ Sent | **Purchase Order**

You can get the best prices by making a Purchase **alternative**. You must first activate Purchase Agreements and save to see the Purchase Alternatives appear in the **Purchase** application settings.

Products | Other Information | Alternatives

Purchase Agreements
Manage blanket orders and purchase templates

Purchase Alternatives
Link RFQs together and compare them

Manufacture

Receive products

3

Randall • Inventory Officer

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

You

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

Receive products

3

Inventory

Receipts

1 To Receive

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

Receipt 1

Receive Products

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

WH/IN/0002

Receive From Only Wood Inc.

Operations | Additional Info | Note

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

Validate

Create Backorder?

You have processed less products than the initial demand.

Create Backorder | NO BACKORDER | Discard

Manufacture

Operations & work centers

4

Sharlene • Manufacturing Engineer

I plan to better organize the manufacturing line by having **2 work centers**: **Assembly Station** and **Painting Room**.
Can we set up a tablet with instructions on each station?

You

Sounds like a good idea. **From the Bill of Materials** of the Table, I'll create **2 operations**:
a **60 minute Assembly** operation in the **Assembly Station**.

And a **60 minute Painting** job in the **Painting Room**.

Sharlene • Manufacturing Engineer

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

Operations & work centers

5

Manufacturing   Products ▸ Bill of Materials

Product	BoM Type
Table	Manufacture this product

Components | Operations | Miscellaneous

Operation

Add a line

Operation Assembly

Work Center Assembly Station

Apply to variant?

Work sheet

Worksheet

- PDF
- Google Slides
- Text

PDF? Upload your file

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

Manufacture

Plan an order

5

You

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

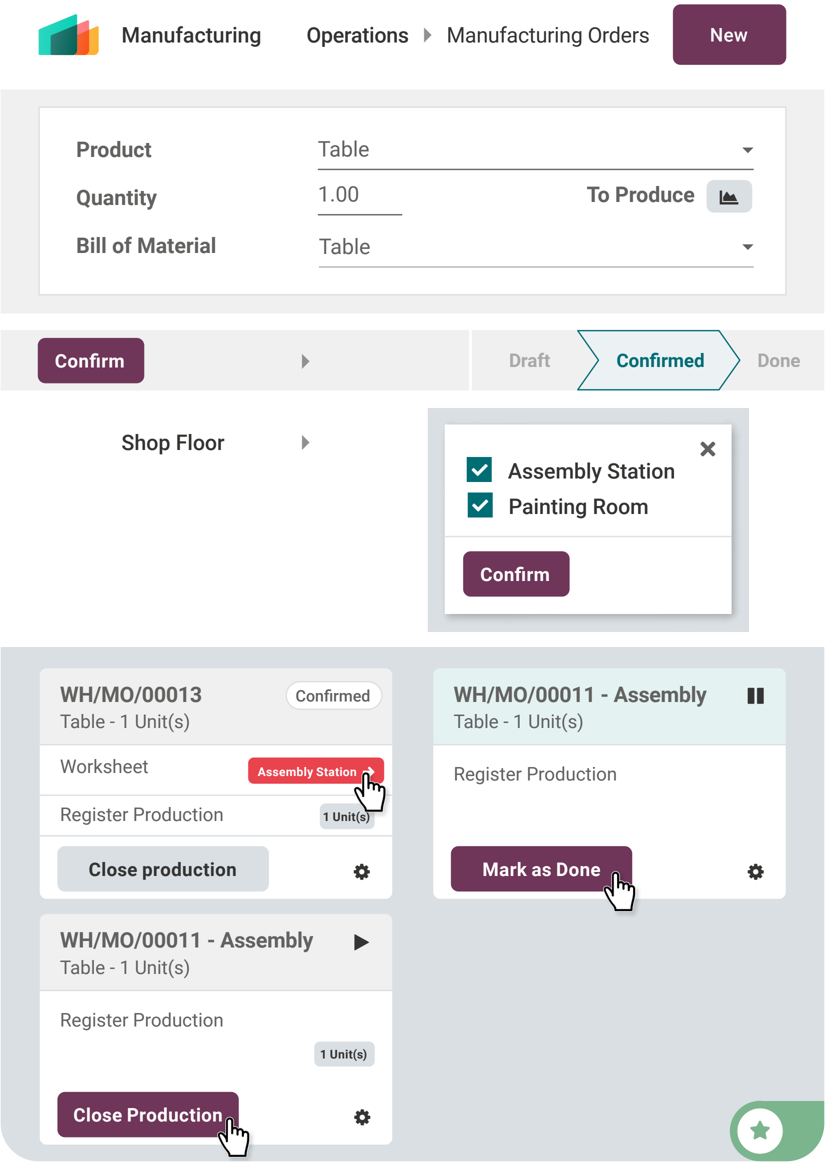
When it's **confirmed**, operations become available on the tablet at each work station.

Sharlene • Manufacturing Engineer

I'll go to the **Shop Floor** application and process the manufacturing operations from there. I'll start with the **Assembly Station**, then I'll continue with the table in the **Painting Room**.

Plan an order

5



Manufacture

Add a quality check

6

Rachel • After Sales Services

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

You

It's probably related to the bolts. I will **create a Control Point** on the Work Order Operation **Assembly** to measure the torque, by using the **Quality app**.

We will ensure that the measurement stays between 11.00 and 15.00 Nm.

Add a quality check 6

Close

Quality | Quality Control > Control Points | New

New

Title	Torque Setting	**Control Frequency**	All

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

Products	Table ×	**Type**	Measure
Operations	MyOff.: Manufact. ×	**Norm**	13.00 Nm
Work Order Operation	Assembly	**Tolerance**	from 11.00 to 15.00
		Step Document	Specific page of Op...
		Worksheet Page	1

Specific Page of Operation Worksheet allows you to designate the right page of the worksheet when it's time to perform quality control.

Quality Control Points

Bonus Point • Get an ★ if you thought about clicking on the upload icon.

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

Manufacture

Check your quality test

7

You

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

Sharlene • Manufacturing Engineer

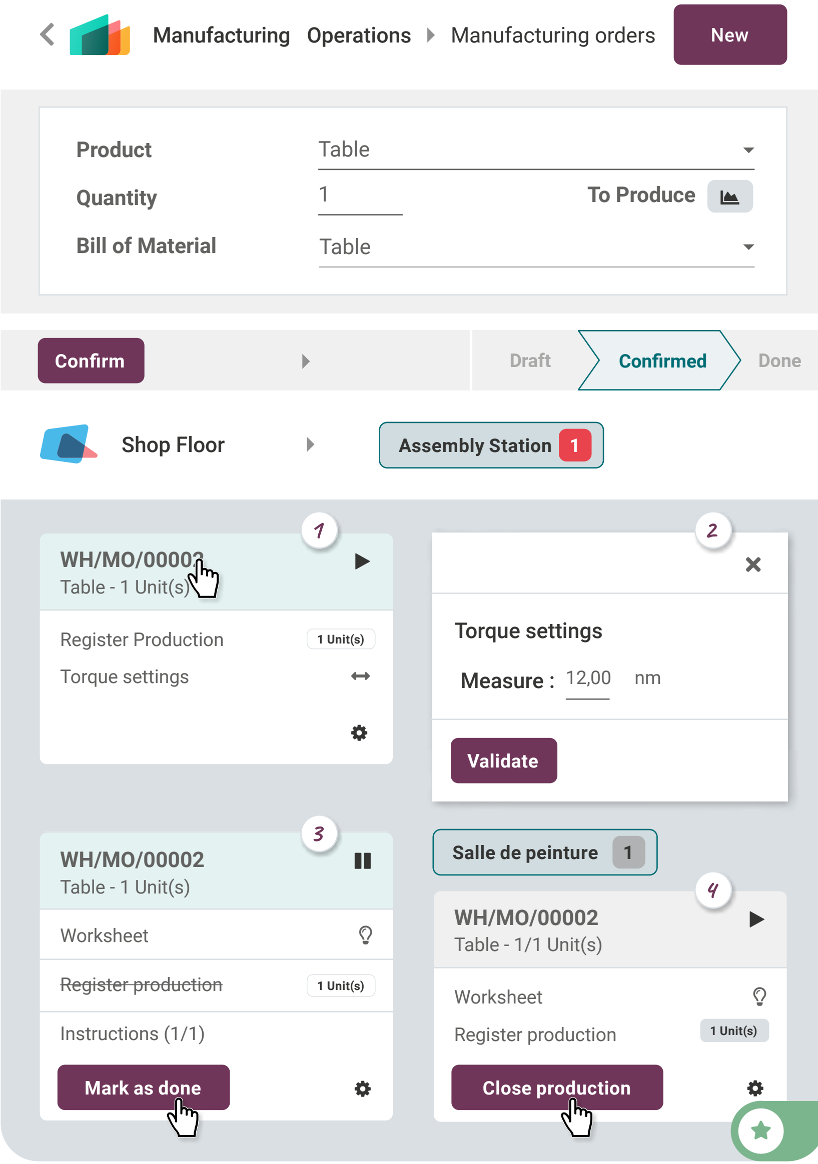
That's good. We have to **create a new table**. I'll take the opportunity to test executing the **work order via the Shop Floor app**.

You

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

Check your quality test

7



Manufacture

Control cost

8

Anita • Accountant

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

You

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

Control cost

8

Close

Manufacturing Products > Bills of Materials

Product	BoM Type
Table	Manufacture this product

BoM Overview

BoM Structure & Cost

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

As Anita doesn't have the user access rights for Manufacturing, you can send her a document with the details of the BoM.
Click on **Print** and a PDF will automatically be downloaded.

Use *Barcodes*

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

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

Configure the scanner	1
Set up your product	2
Receive products	3
Sell products	4
Deliver products	5
Adjust inventory	6
Define locations	7
Move products	8

Install the app

Apps

Barcode

Use barcode scanners to process logistics operations.

Install

If you did select the Inventory application when creating your database, the Barcode application has been automatically added to your database.
So you don't need to install this application.

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

WHIN

DESK12345678

OBTVALI

WHSTOCK

OBTPACK

ZONEA

Use Barcodes

Configure the scanner

1

Paul • Secretary

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

You

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

Paul • Secretary

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

Configure the scanner

1

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

Note that you'll need to authorize the Odoo app to use your camera when you hit the "Tap to Scan" button or the barcode at the top of the purple menu.
Also, if your phone's camera has a wide angle, hide the barcodes you don't need with another card to avoid scanning the wrong barcode.

If you use a barcode scanner

1. **Plug the barcode scanner** into your computer.

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

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

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.

Use Barcodes

Set up your product

2

You

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

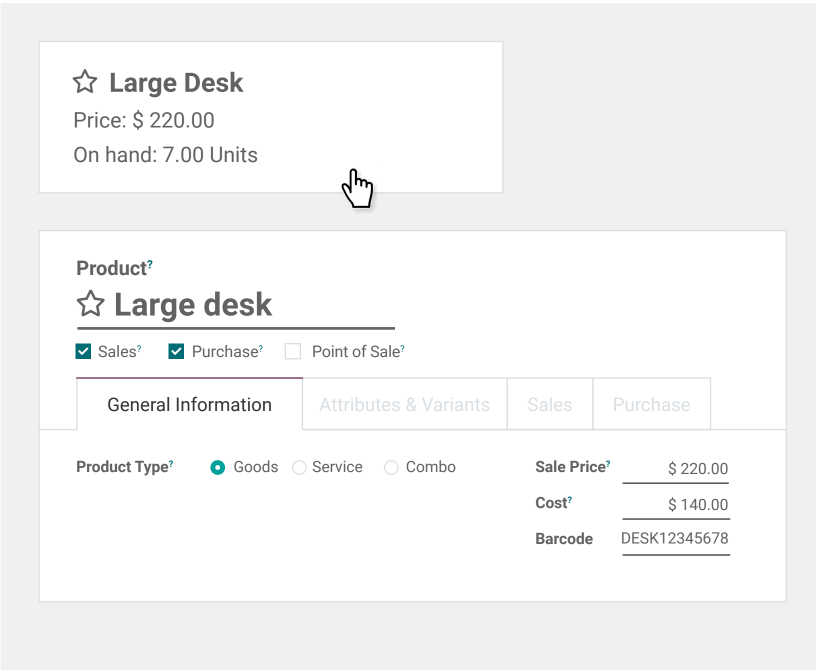
Can you **add the barcode references** to our products?

Sharlene • Manufacturing Engineer

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

Set up your product 2

Inventory **Products** ▸ Products



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

Use Barcodes

Receive products

3

Incoming Call...

Hello, I’m the driver from Wood Corner.

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

You

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

Receive products 3

Barcode

1 Initiate a receipt.

WHIN

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

2 Scan the product, 3 times.

DESK12345678

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

3 Validate the transaction.

OBTVALI

Use Barcodes

Sell products

4

Brandon • Customer

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

You

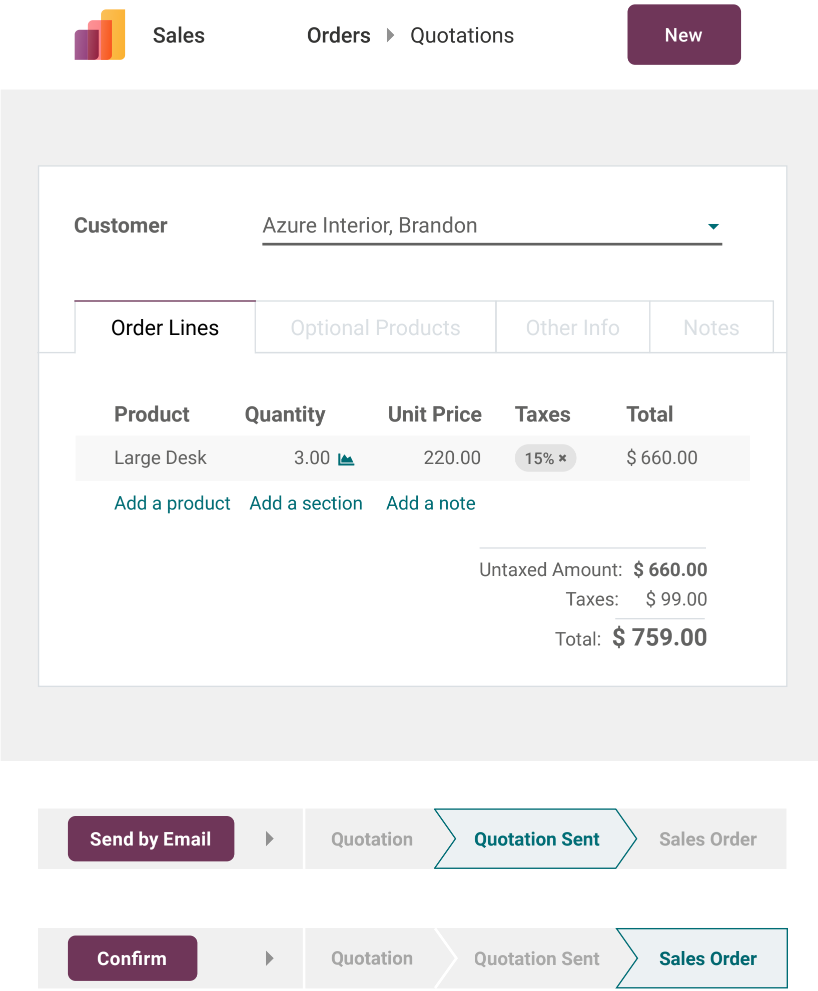
I'll send it to you right now! Your email address is still brandon@game.odoo.com, right?

Brandon • Customer

That's correct!

Sell products

4



Use Barcodes

Deliver products

5

Sophia • Sales Manager

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

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

You

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

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

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

Deliver products

5

Inventory

Configuration ▸ Settings

Operations

☑ **Packages**

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

Save

Code-barres

Opérations

DELIVERY ORDERS 1

☆ WH/OUT/00002 Ready

Azure Interior, Brandon

1 DESK12345678

2 DESK12345678

3 OBTPACK

4 DESK12345678

5 OBTPACK

6 OBTVALI

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

Use Barcodes

Adjust inventory

6

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

You

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

Adjust inventory

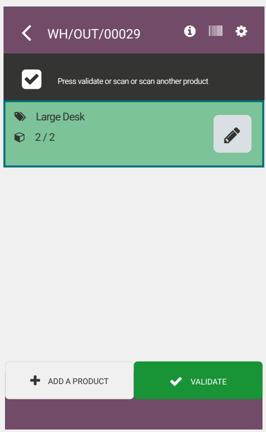
6

Barcode

Inventory Adjustements

1 Scan 3 times

DESK12345678



2 Validate the inventory

OBTVALI

Use Barcodes

Define locations

7

Roger • Inventory Manager

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

You

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

Roger • Inventory Manager

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

Define locations

7

Inventory Configuration ▸ Settings

Warehouse

Storage Locations
Track products location in your warehouse.

Save

Inventory Configuration ▸ Locations New

Zone A

Parent Location
WH/Stock

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

Location Type Internal Location **Barcode** ZONEA

Repeat this opeation to create the 2 other locations:
ZoneB • Internal Location • ZONEB
ZoneC • Internal Location • ZONEC

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

Use Barcodes

Move products

8

You

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

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

Sharlene • Manufacturing Engineer

Ok, I'm on it.

Move products

Barcode

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

WHSTOCK

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

DESK12345678

3. Next, scan the destination shelf: ZONEA.

ZONEA

4. Finally, validate it.

OBTVALI

Manage *your team*

Now that you have set up a business management software, operation flows are automated and your business grows! There are more and more demands, so you need to hire more people. As the CEO of the company, you start the recruitment yourself.

Install the Apps required for the following business flow.

Create a job description	1
Refer a friend	2
Make an offer	3
Add the employee in the system	4
Evaluate your employee	5
Schedule your time off	6
Submit an expense	7

Install the apps

Apps

Recruitment

Track your recruitment pipeline

Activate

Do the same for all of those applications :

- Referrals
- Time Off
- Appraisals
- Employees
- Expenses

The **Referral App** automatically installs the **Website App** so it gives you the opportunity to share the job position with a friend.
If you don't want to spend time creating a website now, you can simply click on the bottom right corner on the button "**Go to Frontend**". Note that if you plan to play the Sell Online use-case after, you will have to create your website from scratch (with no template).

To install the **Salary Configurator** module, search for *hr_contract_salary* and make sure to remove the "Apps" filter in order to find it.

Module hr_contract_salary ✖ Search...

Manage your Team

Create a job description

1

Eli • Marketing Manager

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

You

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

Eli • Marketing Manager

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

You

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

Create a job description 1

Recruitment

New

Create a Job Position

Job Position Marketing and Community Officer

Application email marketingcommunityofficer@myoffice-inc.odoo.com

Create | Discard

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

New

Job positions

Applications

Marketing and Community Officer

Configuration

Recruitment | Job Summary

The Marketing team is looking for someone who has:

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

Don't forget to publish your job offer on your website. **Published**

Manage your Team

Refer a friend

2

Audrey • Employee

Hey! I saw your job description for a Marketing and Community Officer, is the position still available? I'd like to make a **referral** for my brother-in-law, Jeffrey Kelly, he is very interested and skilled.

You

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

Audrey • Employee

Great idea!

Refer a friend

2

Referrals

Next › ▸ Start Now ▸ View Jobs

Marketing and Community Officer

1 Open Position 100 Points

The Marketing team is looking for someone who has:

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

Send Email | Send SMS | Job Page

Send Job Offer by Mail

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

Subject Job for you

Body Hello,
There are some amazing job offers at my company!
Have a look, the might be interesting to you.
See Job Offer

Send Mail | **Cancel**

You can also share a job position by copy/pasting the generated link or via your preferred social media.
If you click on **Send Email** a friend from the home page of the **Referral** app, you'll send to your friend all the jobs available in your company.

Manage your Team

Make an offer

3

Eli • Marketing Manager

The interview with Jeffrey Kelly was great! I'll be happy to have him in my team! Can you make him an offer?

You

Great! I'll **move** him to the **Contract Proposal** status. Then I'll **generate an offer** and **send it** to him **by email.**

Eli • Marketing Manager

Oh you can do this with Odoo? How?

You

Yes, I have to create a new **Offer Template** for **Marketing Officer**. As discussed, it will be a **yearly cost of $39,000** for a **full-time contract**.

Eli • Marketing Manager

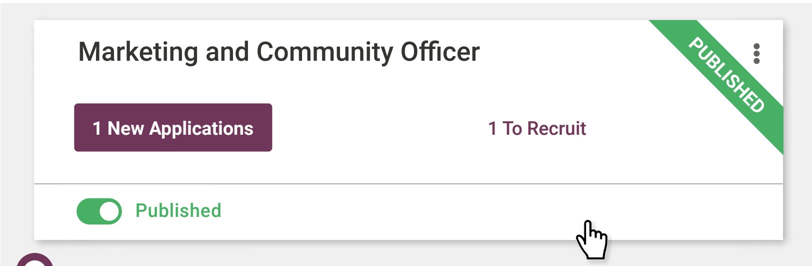
Perfect, I'll call him to announce the great news and that he'll receive the offer by email.

Before generating your offer, you need to configure a contract template with the following information in the configuration of the **Employee** app: reference of the contract, the HR Responsible, and the Yearly Cost (Real).

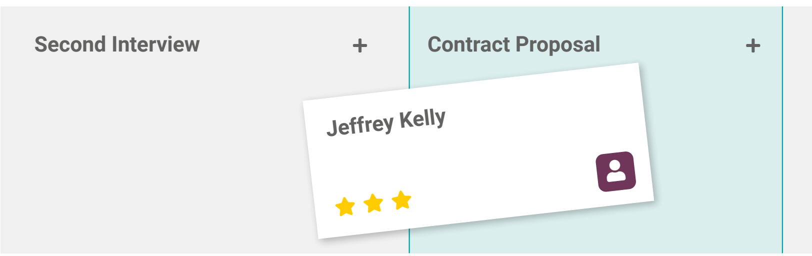
Make an offer

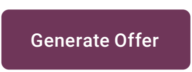
3

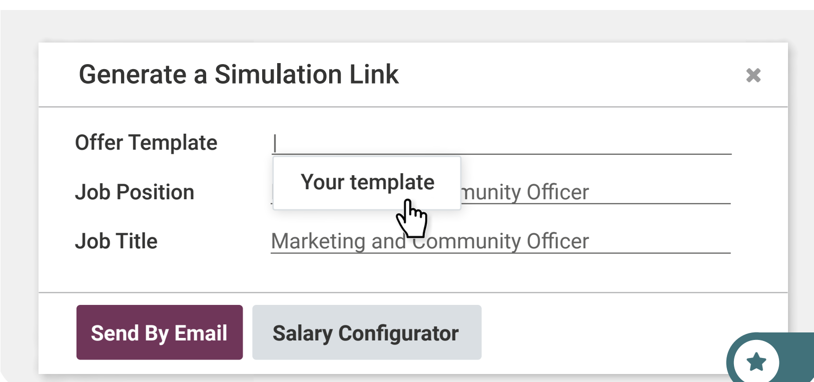
Recruitment



In order to see "**1 New Applications**", you need to apply for this position. You can do so when sending the **recommendation**, by entering your e-mail address, or from the job offer, by creating an application.







Manage your Team

Add the employee

4

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

You

Yes! I'll just **create an employee** file for him with the info from his resume and assign **you** as his **manager**.

I'll also set 2 **home working days** for Wednesday and Thursday and the rest at the **office**.

So he is officially part of the company, yay!

Jeffrey Kelly
Business mobile:
456 065 8856

Activate the Remote Work option in the Employees app : Configuration ▸ Settings ☑ Remote Work

Add the employee 4

Recruitment

Marketing and Community Officer

PUBLISHED

1 New Application

1 To Recruit

Published

Jeffrey Kelly

J

Contract Proposal

Contract Signed

Create an Employee

Jeffrey Kelly

Marketing and Community Officer

CV	Work Informatiion	Private Information

REMOTE WORK

Determine your default workplace for each day of the week.
This schedule will be repeated every week.

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

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

Manage your Team

Evaluate your employee

5

Eli • Marketing Manager

Hello, while I think about it, can you **create an appraisal** for **Jeffrey** and put **me** as **manager** please?

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

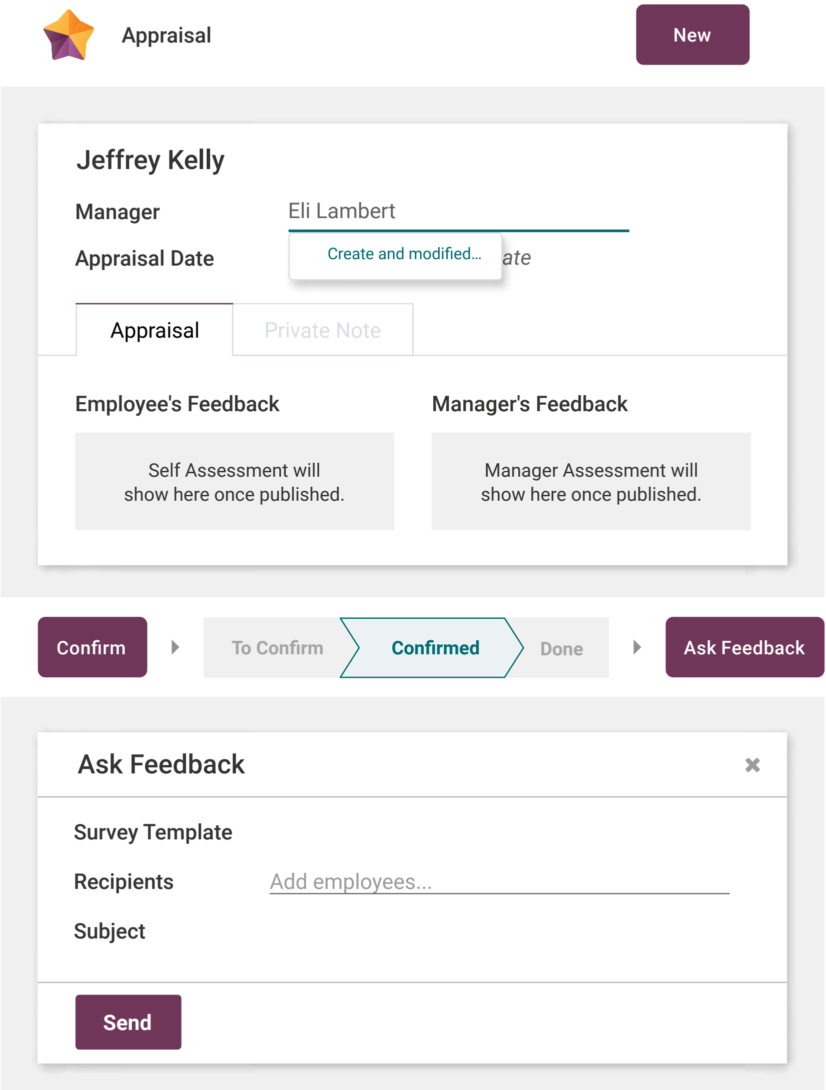
Amazing! Could you also make sure that other employees who collaborated with Jeffery can give their feedback too?

You

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

Evaluate your employee

5



Manage your Team

Schedule your time off

6

Jeffrey • New employee

Hello, when I signed the contract, I talked about taking **3 days off in June**, do you remember?

You

Yes, that's right!
First, I'll **manage** your **paid time off** by creating a **new allocation** of **20 days valid until the end of the calendar year**.

Then, you can create a **new time off** for June with your **Paid time off**.
Since I'm already in the system, I'll do it for you.

Schedule your time off

6

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

Paid Time Off

Time Off Type	Paid Time Off	
Validated Period	*Today's date*	→ *Put the end of the calendar year*
Allocation	20.00 Days	

Approved To Approve **Approved**

Time Off **Management** ▸ Time Off

New

Jeffrey on Paid Time Off : 3 days

Employee	J Jeffrey	
Time Off Type	Paid Time Off	
Dates	*Day 1* →	*3 days later*
Requested (Days/Hours)	3 days	

Approved **Refuse** **Validate**

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

Time Off
20/20 Days

Manage your Team

Submit an expense

7

Eli • Marketing Manager

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

You

Ok Eli, now that we have a nice business management software, you can use the **Expense app**.
It will ease the accounting department.

Make sure to make a **New expense, create a report** (even if there's only one) and **submit to your manager** (me)
I will **approve it**.

Submit an expense

Expenses

New

Description

Welcome Lunch for Jeffrey

Category	[FOOD] Meals
Total	$102.55
Employee	Eli Lambert
Paid By	Employee (to reimburse) / Company

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

Create Report ▸ **To Submit** › Submitted › Approved › Posted › Done

Submit to Manager ▸ To Submit › **Submitted** › Approved › Posted › Done

Approve ▸ To Submit › Submitted › **Approved** › Posted › Done

Close *new deals*

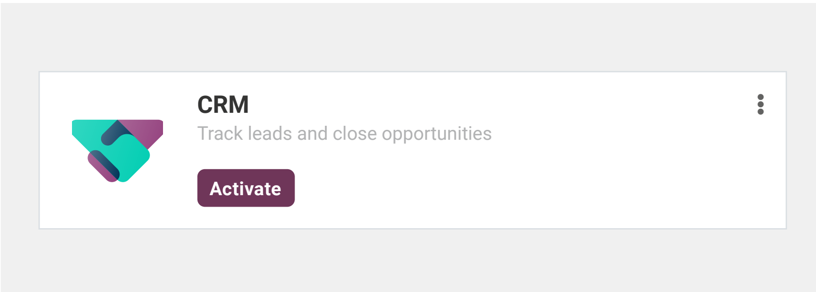
Until now, you have been using an Excel sheet to organize information about your past, present, and future clients. However, with the recent growth of your business, you are finding it increasingly difficult to stay organized with all the new clients coming in! To solve this problem, you decide to invest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

Install the CRM Application to manage the following business.flows.

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

Install the app

Apps



Close new deals

Import ongoing leads

1

You

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

Sophia • Sales Manager

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

You

Oh you’re right! So, I will select **“create new values”** when the error pops up.

Import ongoing leads

1

CRM

Pipeline

Import records

...

Upload file

Select the file **Ongoing leads CRM.csv** you downloaded on **https://www.odoo.com/r/ongoingleads**

Customer *Mike G.*	Customer
Email ...	Email
Notes *Mike G. was very interested...*	Notes

Test

No maching records found
for the following name in field Customer:
...

When a value cannot be matched:

Create new values

- Prevent import
- Set value as empty
- Skip record
- Create new values

Import

Repeat this step for the **Stage** and **Labels** fields

Close new deals

Generate leads

2

Sophia • Sales Manager

Hey, we have a problem, the leads we have are only enough for a couple of our sales people. Others don't have leads to work with.

You

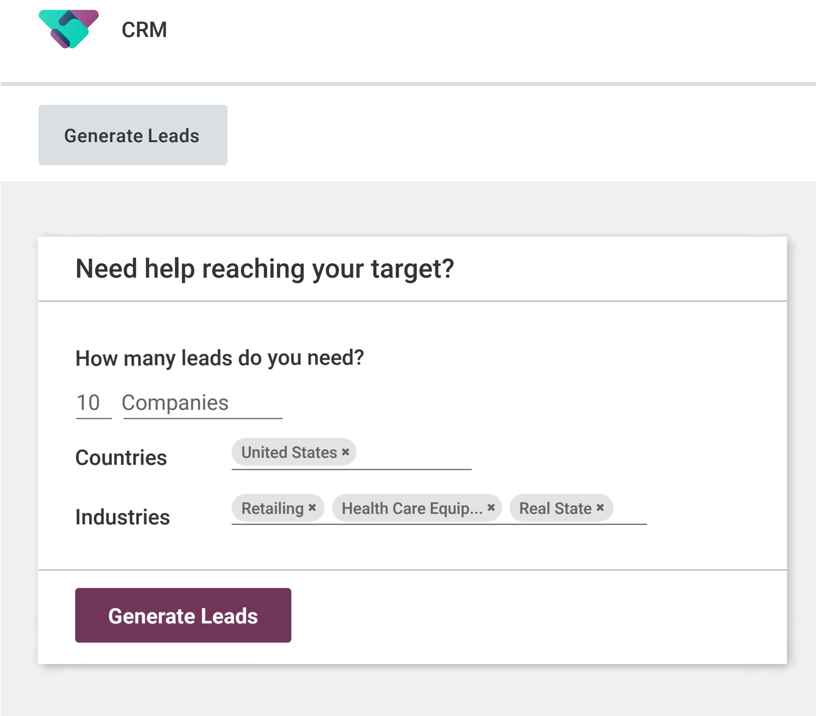
Don't worry, I'll **generate leads** in the **CRM app** and get new leads for you.

Sophia • Sales Manager

Sounds great, let's get **10 more leads** within **the U.S** in our pipeline. Specifically, leads within **Retailing**, **Capital Goods**, and **Real Estate.**

Generate leads

2



Close new deals

Create a new opportunity

3

Sophia • Sales Manager

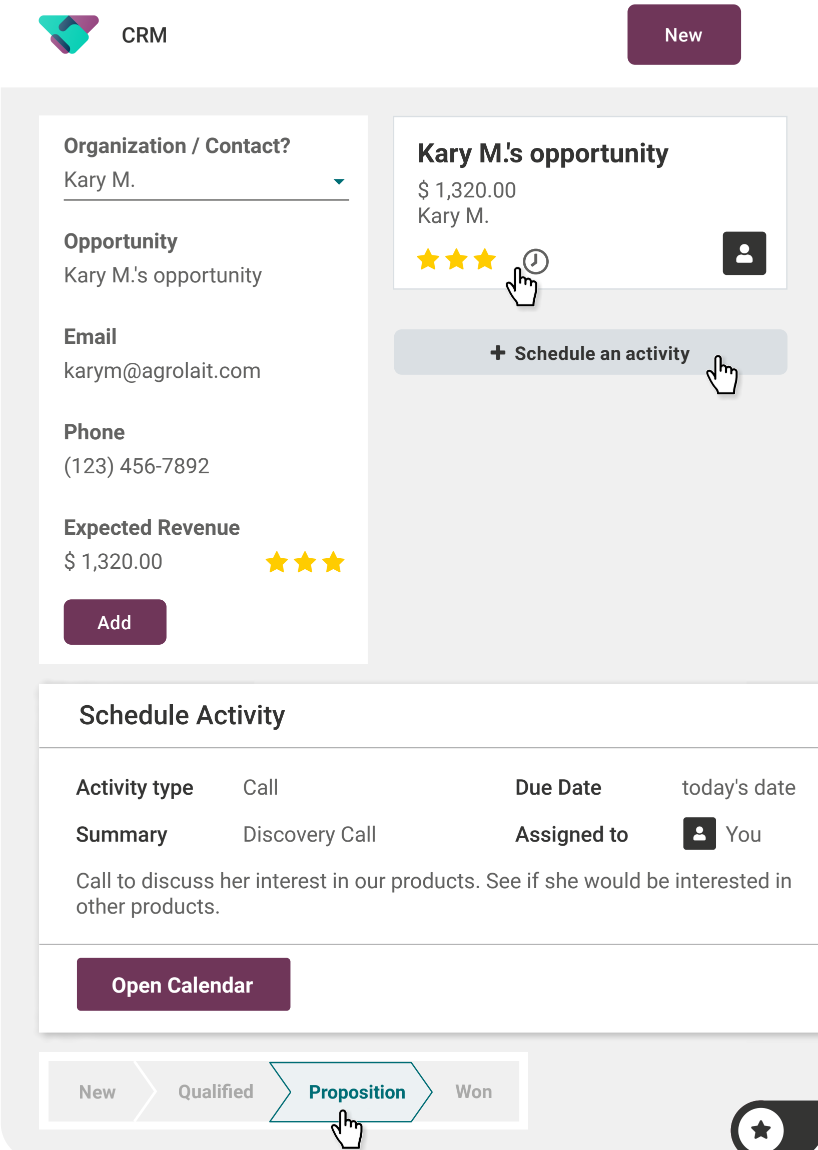
The CRM looks great! Our pipeline is full now! I'll assign my team members on those. By the way, I met **Kary Maxwell** at the Furniture Expo yesterday. Here is her business card. She's interested in purchasing **6 tables**! I think she should be considered a **high priority** in the pipeline.

You

Great! Thanks, I'll **schedule a call for this afternoon**!

Create a new opportunity

3



Close new deals

Send a quotation

4

You

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

Kary • Prospect

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

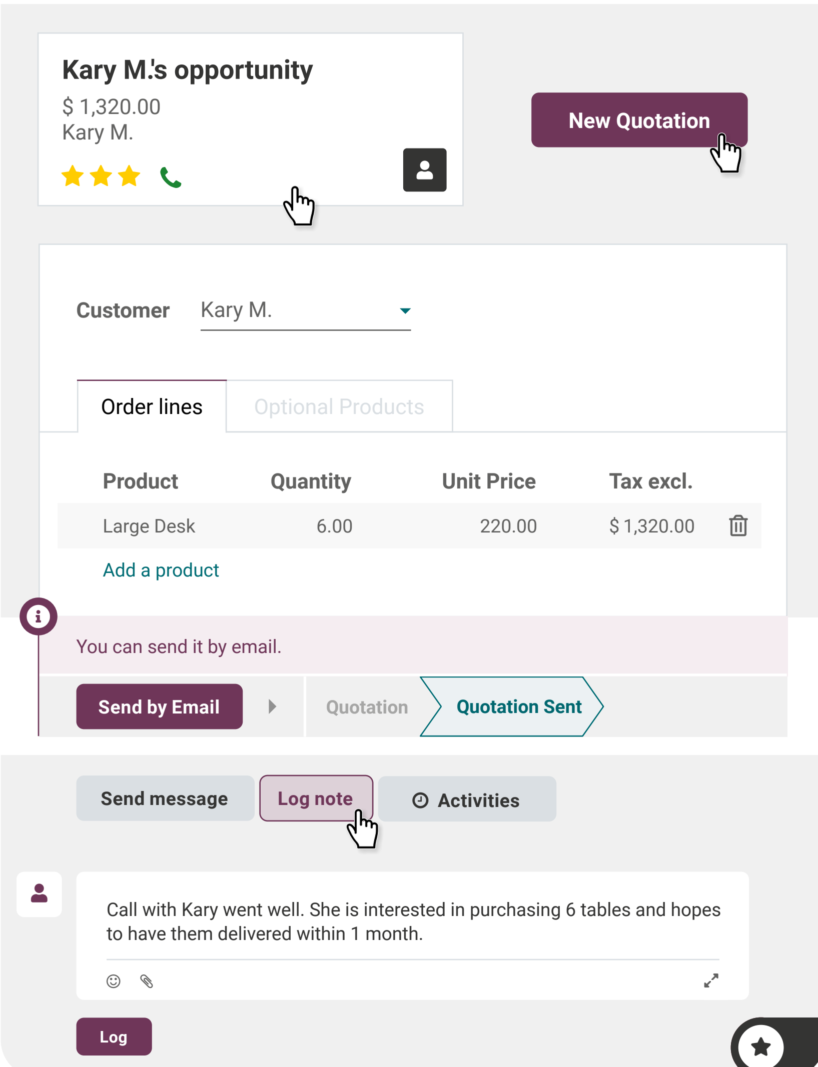
You

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

Send a quotation

4

CRM



Close new deals

Provide a discount

5

Kary • Prospect

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

You

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

Kary • Prospect

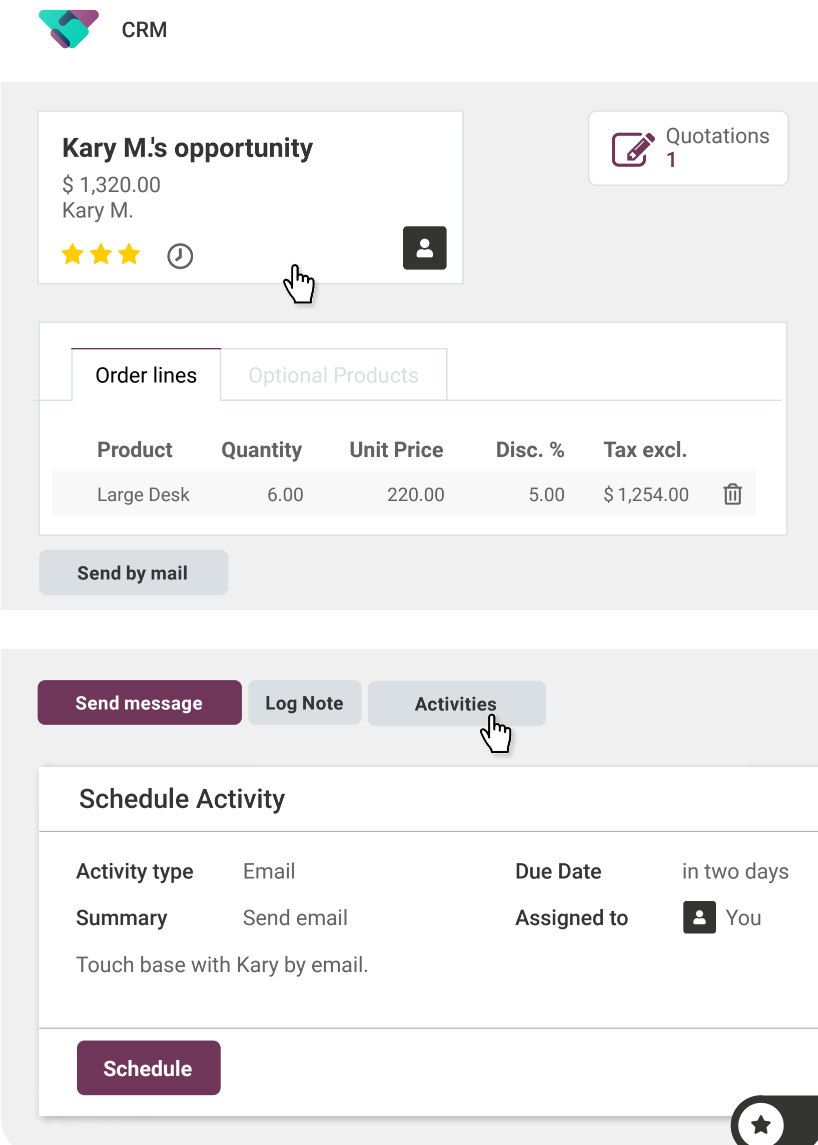
Thanks, a 5% discount sounds good to me. Please **resend me the revised quote**, I should have a decision in 2 days.

You

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

Activate the Discount Option in the app:
Sales ▸ Configuration ▸ Settings ▸ Pricing: ☑ Discounts

Provide a discount 5



Close new deals

Organize your CRM

6

Sophia • Sales Manager

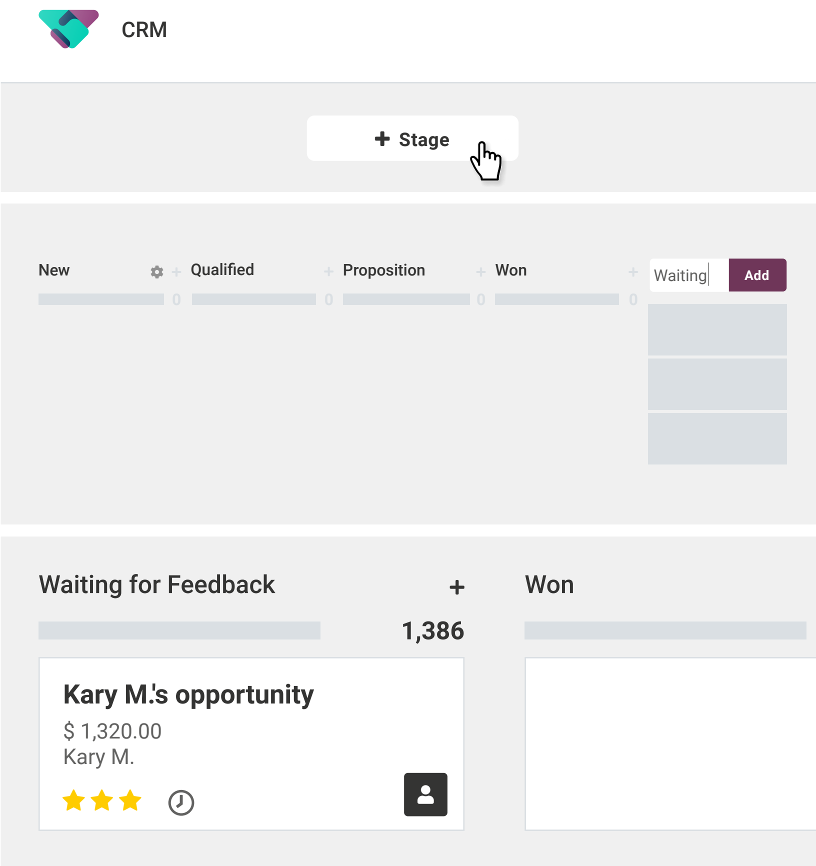
Hello, to organize the pipeline, we should create stages to fit our processes. I think it would be wise for us to **create a stage called "Waiting for feedback"** for customers whom we sent a quote already.

You

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

Organize your CRM

6



Close new deals

Close the deal

7

You • Two days later

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

Kary • Prospect

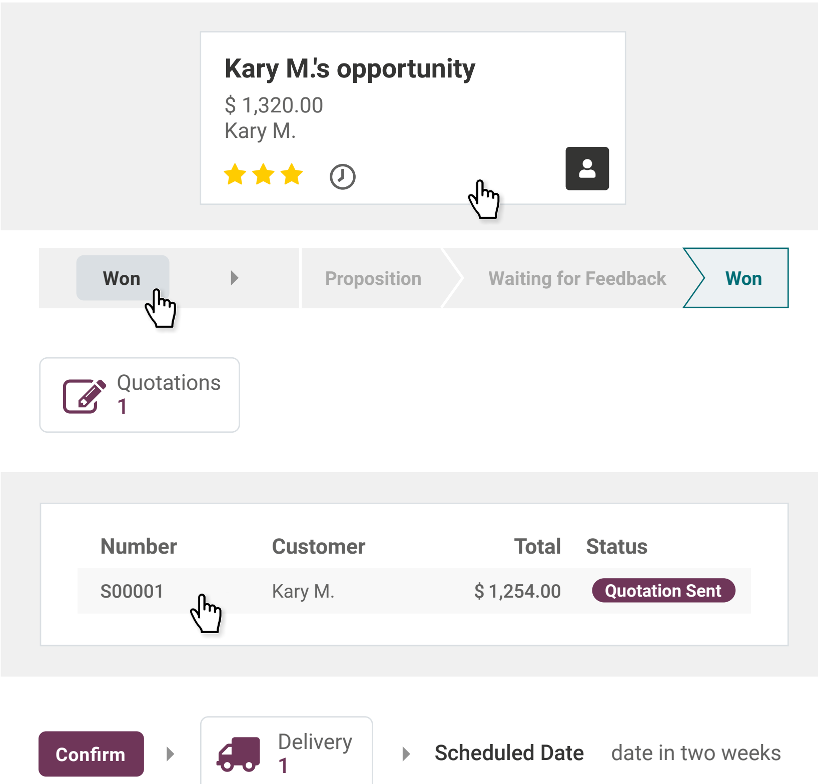
Hello! Thank you for following up. The quote looks good to us and we would like to **proceed** with the order. Can you set the **delivery for 2 weeks** from now?

You

Sounds good!

Close the deal

7



Close new deals

Analyse expected revenue

8

Sophia • Sales Manager

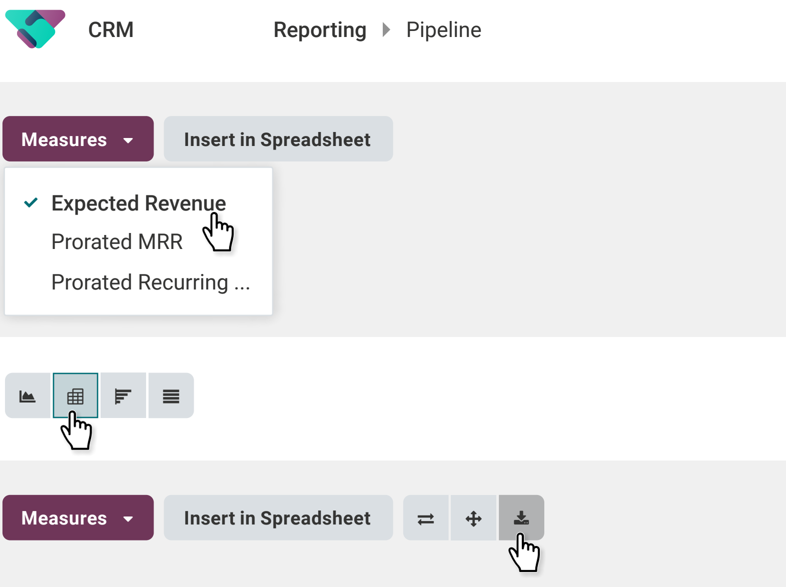
Our pipeline is looking great! I've got a meeting with the sales team. I'm looking for the **Expected Revenue Report**. Can you help me here?

You

Yes, from our current **pipeline,** you can **download** the **report**. **Use the pivot table view**, it's more clear that way.

Analyse expected revenue

8



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 its properties.

Install the Studio App to run the following business flow.

Initialize your app 1

Design office forms 2

Record your offices 3

Manage rental status 4

Add a kanban view 5

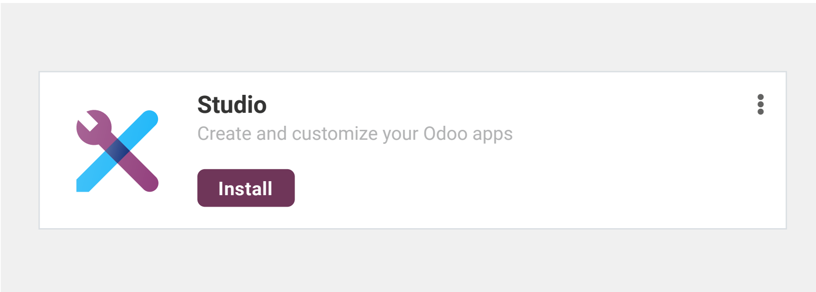
Automate an activity 6

Improve the list view 7

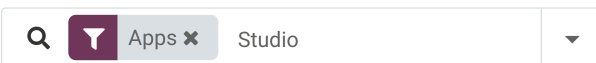
Create statistic reports 8

Install the app

Apps



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



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

Create your App

Initialize your app

1

Sophia • Sales Manager

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

You

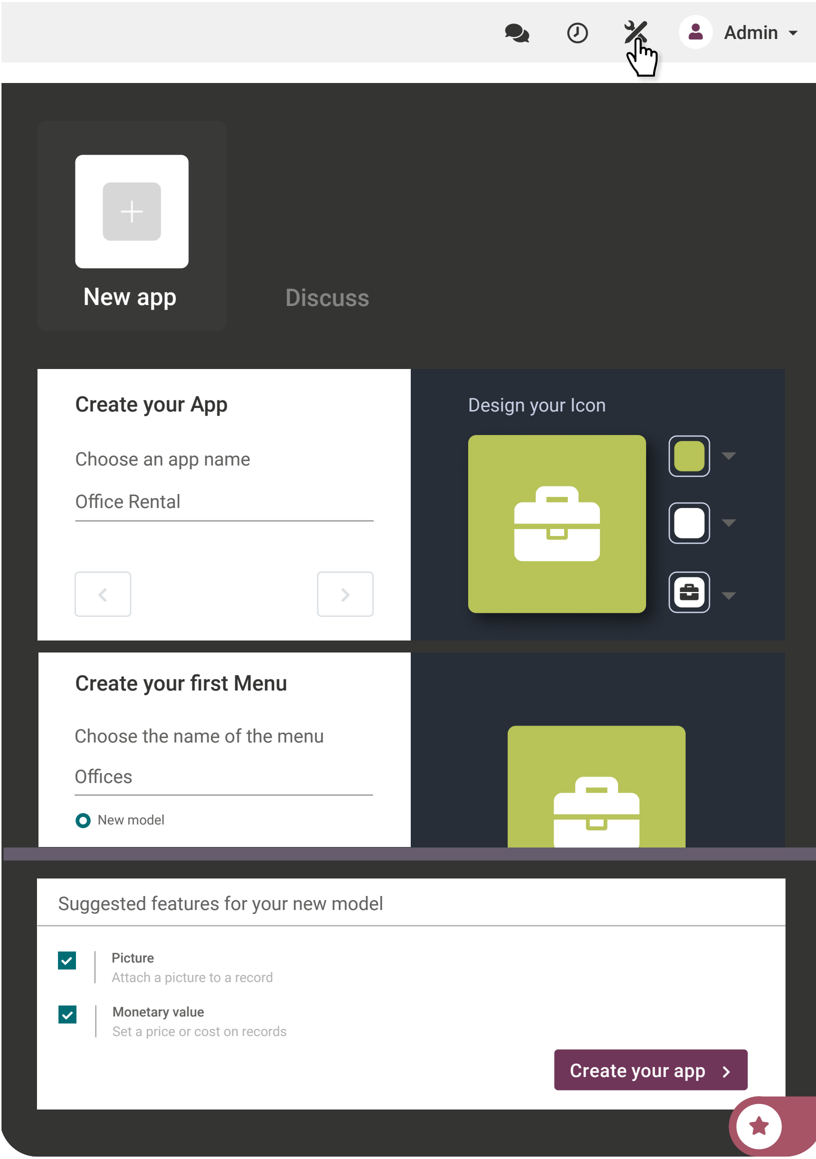
I'll **create an Office Rental app** to manage our **Offices**.

Sophia • Sales Manager

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

Initialize your app

1



Create your App

Design office form

2

You

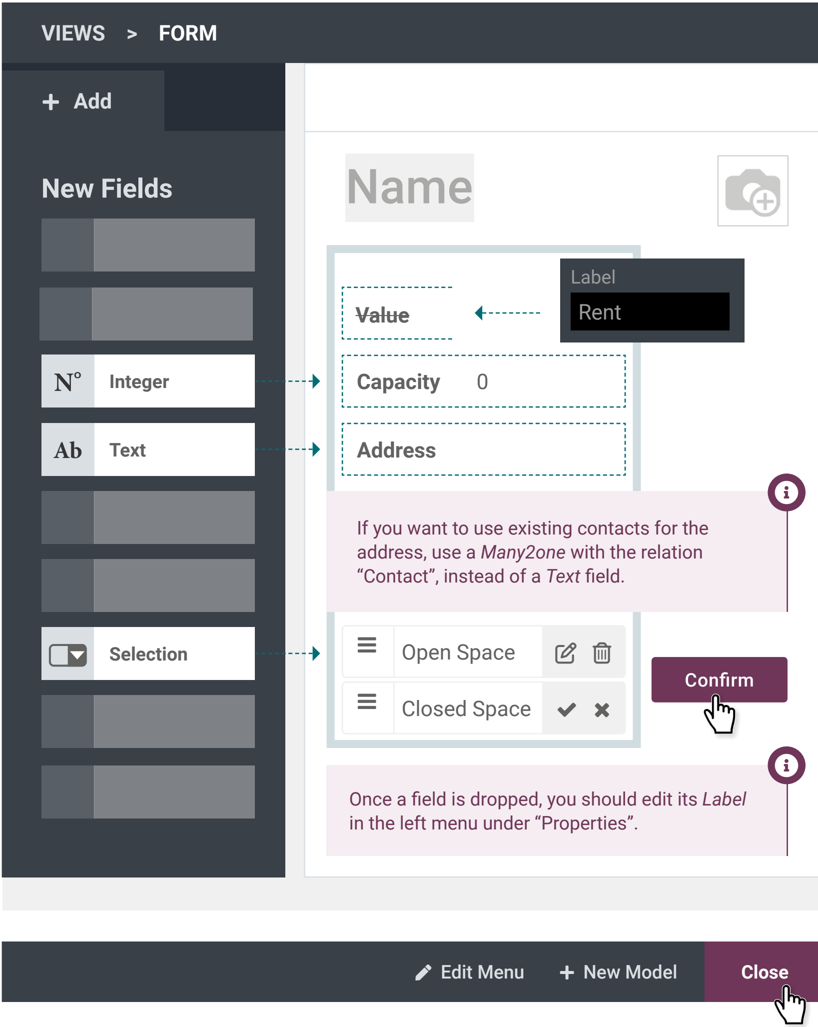
What information do you need on an office form?

Sophia • Sales Manager

So, I'll need the **name, photo,** and **rental price,** but also the **capacity** (number of available desks), **address**, and **type of office** (**open space** or **closed space**).

Design office form

2



Create your App

Record your offices

3

You

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

Sophia • Sales Manager

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

Leased $ 65000

Chestnut

1450, Chestnut Street
Closed Space • 150 desks

Available $ 2000

Creekside

645 Creekside Drive
Open Space • 15 desks

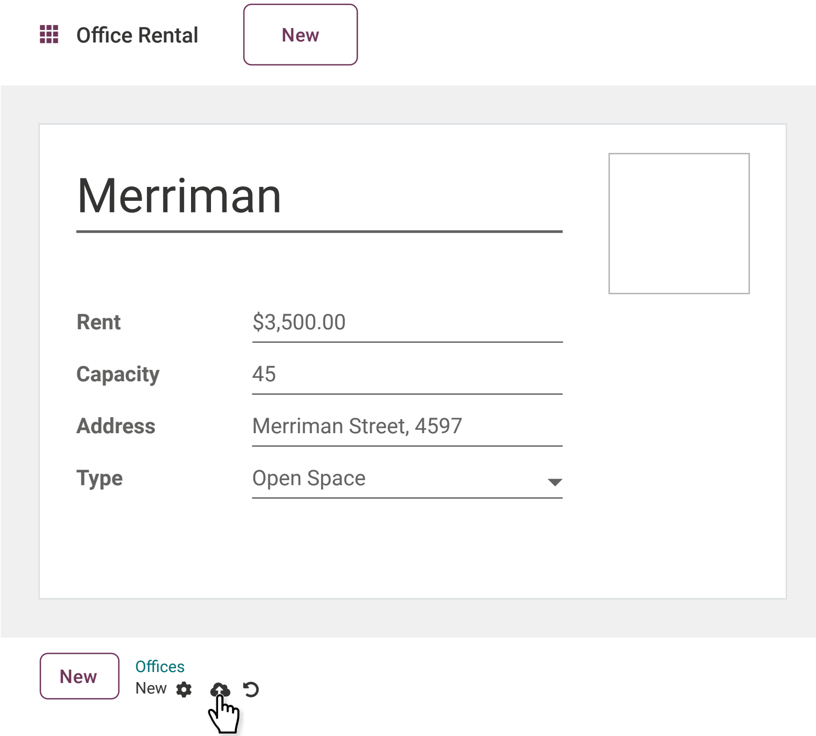
Available $ 3500

Merriman

4597 Merriman Street
Open Space • 45 desks

Record your offices

3



Repeat this operation to create the 2 other offices.

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

Create your App

Manage rental status

4

Sophia • Sales Manager

I can’t believe that you are making this app by yourself!

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

You

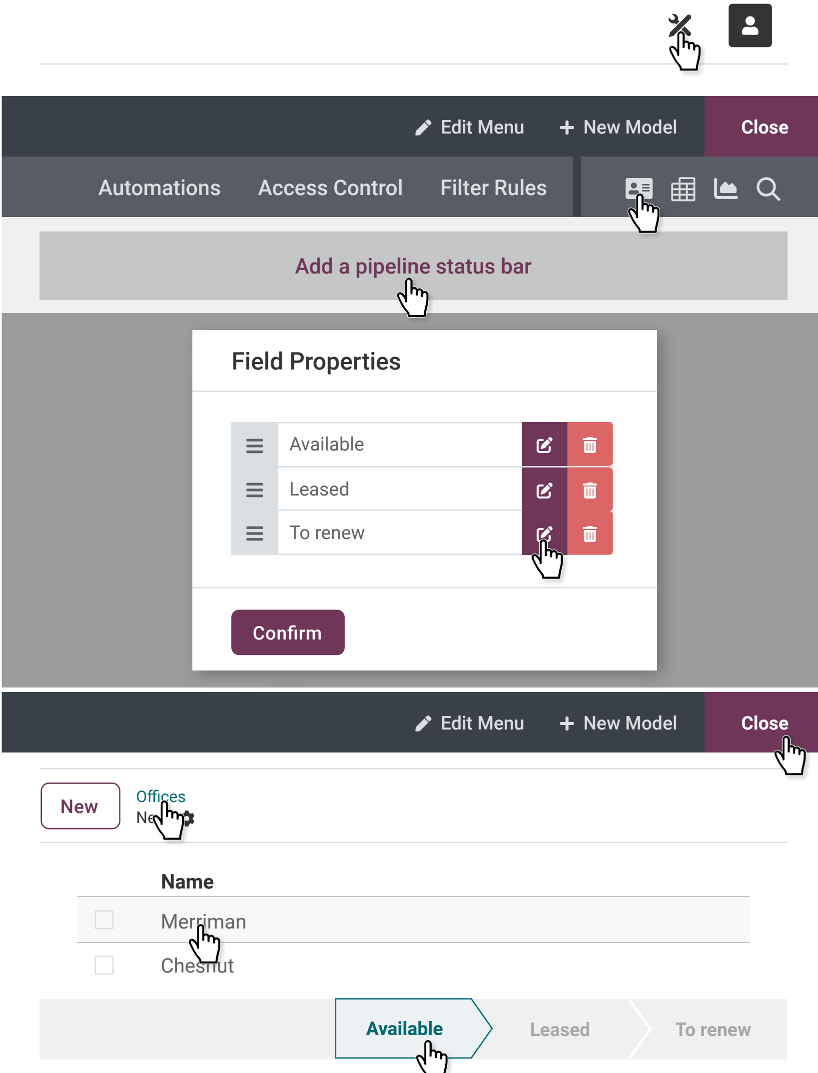
Yes! I can **add a pipeline status bar** to the form.

Sophia • Sales Manager

Great! Let me know when it’s done,
so I can **add the status for each office**.

Manage rental status

4



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

Create your App

Add a kanban view

5

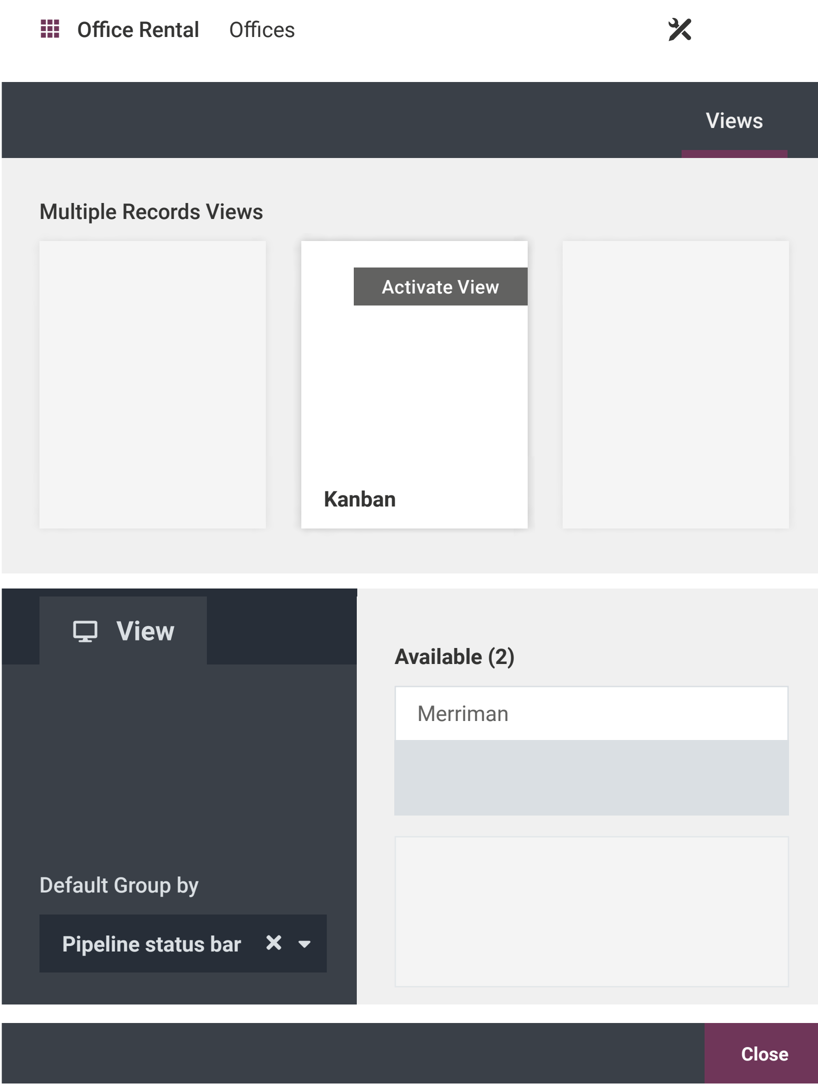
Sophia • Sales Manager

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

You

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

Add a kanban view



Create your App

Automate an activity

6

You

How do you make sure our clients are happy?

Sophia • Sales Manager

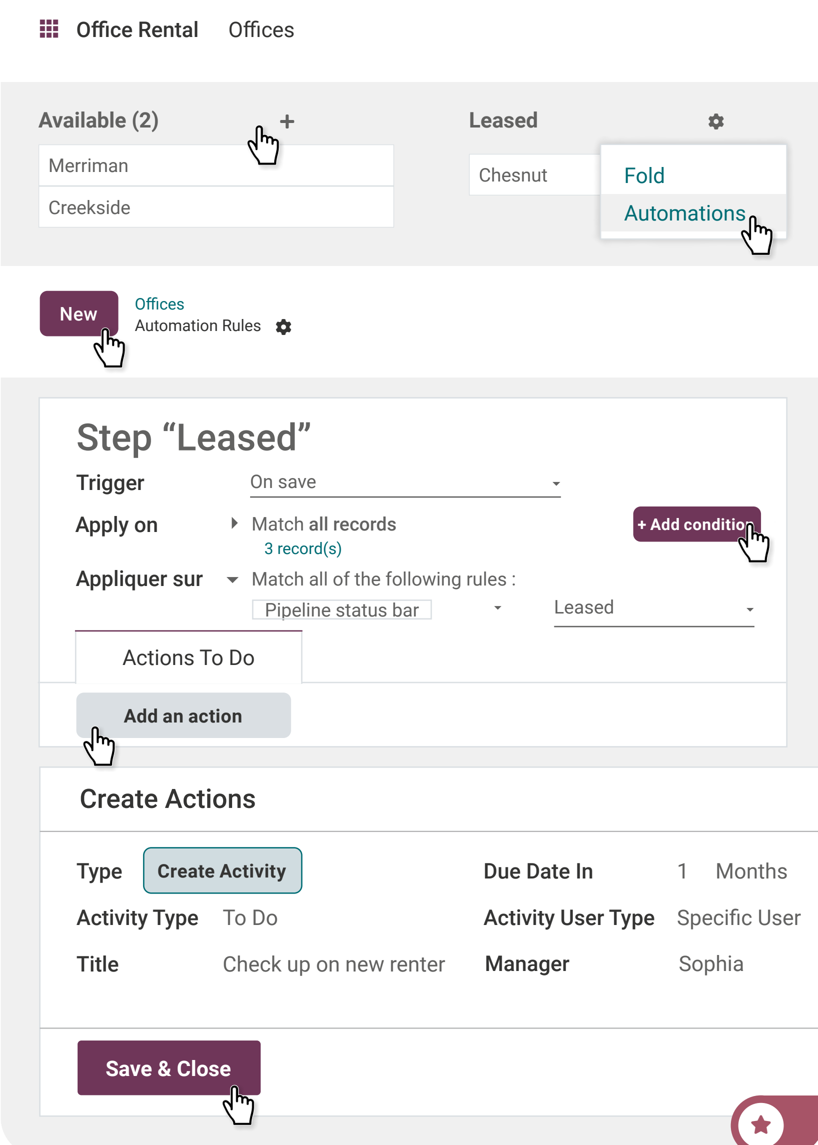
I asked them when I think about it.

You

Let's make this more professional by **adding a new action** on the stage "**Leased**".
So that as soon as the office is in the Leased stage, there will be automatically a new **activity type** "**To Do**" with the **title** "**Check up with the new renter**", planned **1 month** later.

Automate an activity

6



Create your App

Improve the list view

7

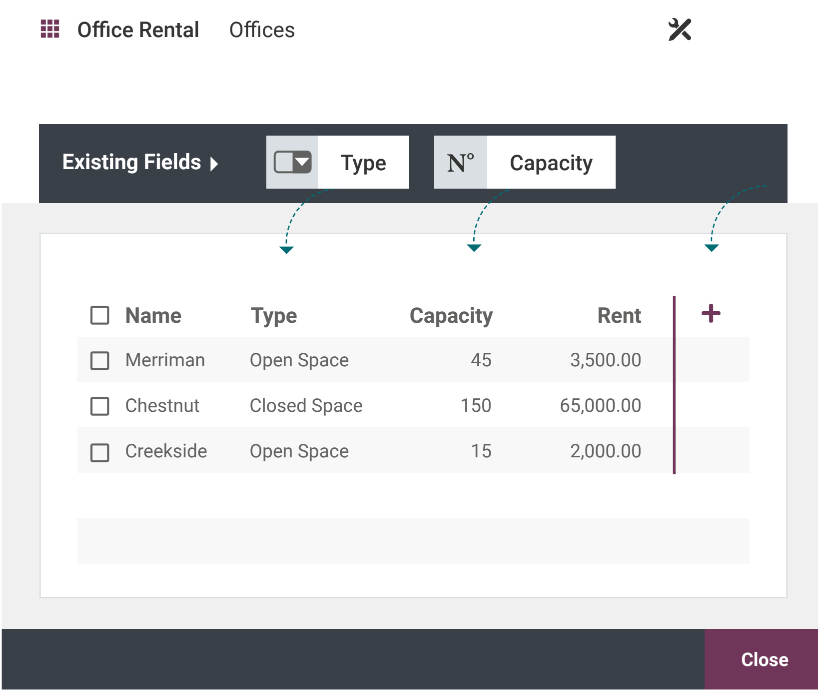
Sophia • Sales Manager

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

You

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

Improve the list view 7



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

Create your App

Create statistic reports

8

You

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

Sophia • Sales Manager

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

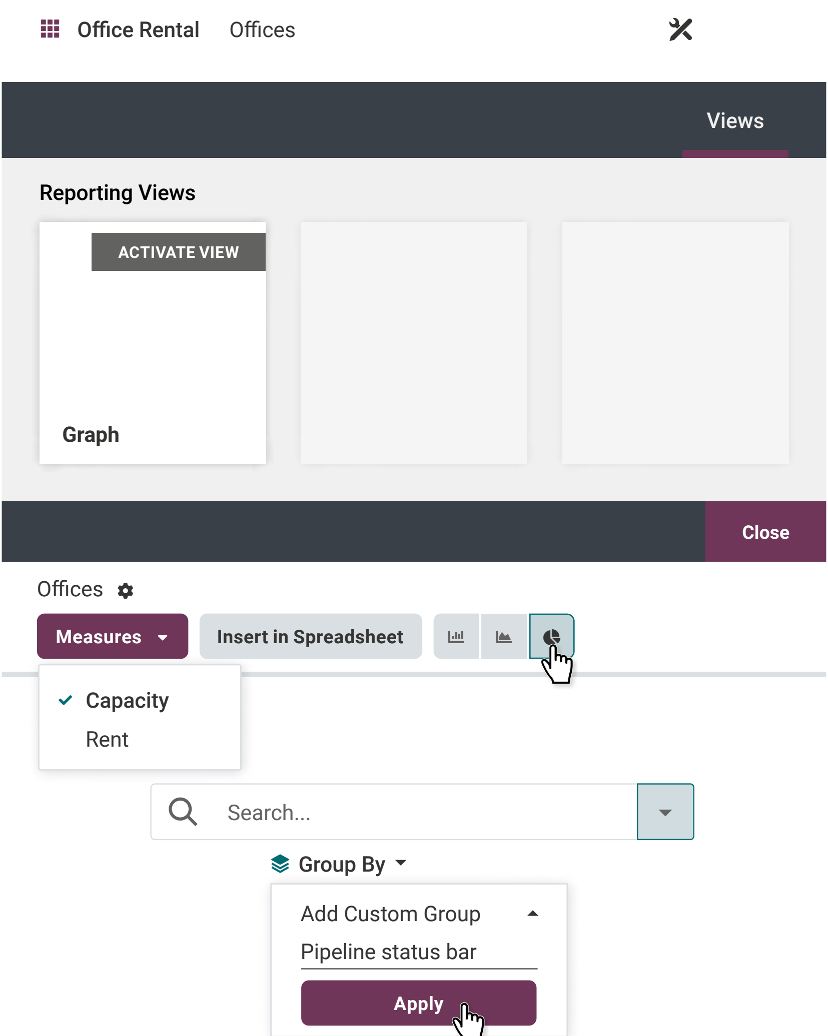
You

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

keep it **simple.**

Create statistic reports

8



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