

# casai

Casai utilizes Odoo ERP to centralize operations, automate processes, and support growth



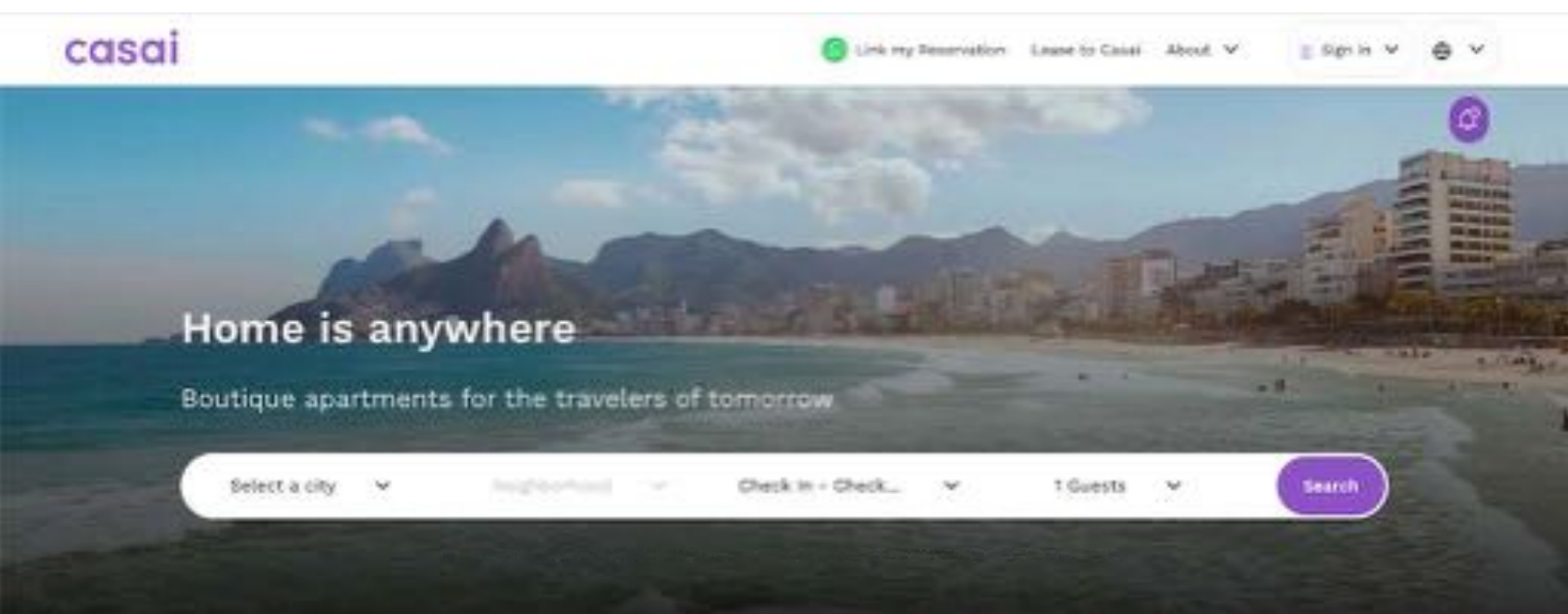
# The call to revolutionize travel

Casai is a boutique apartment designer, curator, and rental service based in Mexico City, with properties spread throughout Mexico and Brazil. Their unique vision and approach to hospitality merges the authenticity of locality with 5-star luxury to create experiences tailor-made for the travel-savvy generation.

Back in 2019, Casai founders Nico Barawid and Maricarmen Herrerias noticed that the hospitality industry was lacking in its ability to simultaneously serve the needs of two distinctly different types of traveler: Those who crave an immersive, locally-interested experience, and those whose top travel needs include crisp-cool sheets and cucumber-slice-on-the-face-level pampering (ahh). Realizing the ripeness of opportunity in identifying this market gap, the duo resolved to combine their deep business and hospitality expertise to create spaces where these two types of traveler can unite in harmony. The rest is history.

Today, with operations in full swing, the Casai team carefully crafts each apartment's aesthetic to tell the stories of the neighborhood it belongs to, all the while heeding the tenets essential to providing a luxurious, lush stay. It is this combination of authenticity, splendor, and comfort that ultimately generates what has come to define the Casai travel experience: State-of-the-art technology, artisan design, digitally-interfaced guest services, a trustworthy and robust WiFi connection, and a strong emphasis on creating that special kind of comfort one can only find at home.

Casai is not only revolutionizing the way travelers stay, but the levels of immersion and comfort now made readily available throughout your favorite parts of Latin America.



# Situation

## Odoo ERP supports Casai's growth

Starting from a humble handful of apartments in Mexico City, Casai has experienced exceptional growth with 1000+ locations now available throughout Mexico and Brazil, from Tulum to Rio De Janeiro. However, as would be the case in any industry, such impressive growth can often lead to scalability issues and strain across operations, ultimately causing slight disruptions in processes that, if left unattended, can become cumbersome for those attempting to run a business without a robust ERP system.

This was exactly the scenario our friends at Casai found themselves in.



*“There was a point when we had to start thinking about what the best tool was for organizing ourselves . . . Other softwares were very rigid for what we were doing. We wanted something more flexible, that can adapt to our operations. That’s when we started considering Odoo.”*

MARICARMEN HERRERIAS  
CHIEF OPERATIONS OFFICER, CASAI

# Casai's system of operations before Odoo

Casai's organization is structured around various entities and teams, such as sales, accounting and finance, logistics, customer experience, purchasing, inventory, and IT. And, until Odoo came into their lives, Casai's operations relied on isolated systems unable to communicate between each other, resulting in an effectively inefficient and time-consuming combination of processes.

Casai had been taking advantage of online platforms and tools to manage the different aspects of their business, including:

- + Guesty
- + ZenDesk
- + ContPaq
- + BreezeWay
- + Slack
- + WhatsApp

As hard-earned success led Casai to substantial growth, the absence of connectivity between Casai's essential business functions led to an overall lack of control over their full scope of operations. Put simply: A total deficiency in visibility over every corner of their organization. Without integrating lines of connection established between each of Casai's business functions, it became difficult for those in charge of each individual process to ensure that operations were meshing smoothly with the system as a whole.

The Casai team began to feel unable to keep up with their growth, especially where accounting and sales operations were concerned. Growth-impeding mistakes, oversights, and lapses in seamless operation felt as if just on the horizon.

Our diagnosis in one sentence? Casai was in need of developing one true picture of their organization. In other words: Odoo ER

*“ If we had continued to grow without an integrating solution, we would have started making mistakes that affected our growth. ”*

ALBERTO RAMOS  
CHIEF REVENUE AND MARKETING OFFICER, CASAI

# Challenge

## Casai's Odoo integration sets a record-breaking deadline

Casai met with our Odoo consultants to discuss a full Odoo integration. Having gone through the motions of getting to know the Casai intimately enough to begin to structure an integration fit to their needs, our Odoo consultants resolved to integrate an Odoo open source ERP system that provides Casai with that one true picture of their organization to scale.

But with Casai's growth moving so quickly in tandem with today's ever-pressing market for rental services, Nico, Maricarmen, and the rest of their team resolved to request once heck of a hard, no-funny-business deadline: While projects of Casai's scope usually take somewhere around 8 to 12 months to implement, OSI agreed to integrate Odoo accounting and sales within just 7 weeks, with a focus on logistics over the course of a few short months thereafter. In other words, in order to make this project a complete success, it would have to be done in no time flat.

The Casai and OSI teams agreed on a two-phase integration, broken up over the course of only a few months. If executed properly, the success of such a lightning-fast integration would not only mean a new record for an OSI-led Odoo integration, but also for transforming a client's digital business functions into a streamlined and automated set of processes.

▼ COO MARICARMEN HERRERÍAS AND CEO NICO BARAWID





# Solution

## Centralizing and automating Casai's processes with ERP integration

To meet this aggressive deadline, Casai team members worked closely with OSI consultants to perform a thorough requirements analysis, during which the group agreed that Casai's ideal system called for few customizations, leaving ample space to focus on rigging connectivity between processes. Though Casai had chosen the best of breeds for their business applications prior to Odoo, what their organization actually needed was exactly the thing Odoo ERP is so good at delivering: Integration.

With Odoo, systems such as accounting and sales come together to create one solution, with perks such as automated processes or included logics that can, for example, help to tell whether sales actions have accounting impacts. Under one ERP, an organization's entire team can be brought onto the same page for visibility throughout.



# Approach

How Casai analyzed, optimized, automated, and transitioned their processes to Odoo ERP



## Analyze

After meeting with the Casai team to discuss the ins and outs of their business and get acquainted with their operations on a personal level, OSI's ERP experts settled on these key issues to address throughout the integration:

- + Information was spread across various systems and spreadsheets
- + Various processes required multiple manual steps, including flaws in function that resulted in pain points
- + Increased demand and volume strained existing resources
- + Opportunities to centralize Casai's systems first, with attention to automation thereafter
- + Delays and difficulties in reporting and data analysis

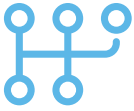


## Optimize

Once the analysis was finished, the project team got to work putting together an optimization plan that focused on centralizing data for streamlined processes that would better support their operations.

### This includes:

- + Centralize information
- + Streamline workflows: Accounting, e-commerce, product management, and more.
- + Increase efficiency gains: Fulfillment, order processing, and shipping
- + Standardize processes: Drop shipment, batch picking, packaging, and more
- + Increase accuracy: Financial accounting, product inventory, and more
- + Provide realtime reporting and dashboards



## Automate

With optimization came a completely centralized and communicable system, bringing the project to exactly the right moment to focus on automating Casai's processes where possible. These included:

- + Reservations, confirmation, payment and collection
- + Vendor bill generation
- + Electronic invoicing
- + Asset and depreciation management
- + Increased throughput streamlined the need to hire additional staff



## Transition

Casai transitioned to their Odoo system over the course of two, lightning-fast phases, each structured to scaffold their organization throughout the migration process to avoid sacrificing momentum:

### + Phase 1:

Accounting and sales in Mexico rolled out in 7 weeks to meet the end of the year deadline

### + Phase 2:

Implemented sales in Brazil, and logistics in both countries

### + The finish line:

Operations are successfully working in both Mexico and Brazil.

*“After two or three weeks [of OSI-led training], we saw that, naturally, over 80% of our sales orders were being processed through the Odoo module . . . Not only did the Odoo modules bring us more control and visibility, but were actually helping our team do their job easier. That’s when we realized the value of this project. ”*





# Project highlight

## Leveraging the Odoo open source community for a streamlined property management system

Among Casai's essential needs, one that stood apart from the rest was the lack of a streamlined and efficient property management system (PMS) to help oversee the technical details of their 1000+ properties. This includes technicalities such as surface areas, available services, and contracts for each individual apartment.

In cases such as this, the OSI team will often reach out to the Odoo community and check whether other Odoo experts have already built modules that might meet the needs of the client at hand. Our experts came across an Odoo project in Spain that had created a complete management system for a hotel. Given that this Spanish PMS was designed specifically for those in the hospitality industry, it stood out as the most promising option.

Casai's particular requirements asked for management modules just a little different from what the Spanish system offered, but with some light reconfiguration, the OSI team was able to rework it to match Casai's needs exactly. As it so often does, the open source approach saves time and resources with the power of the Odoo community; by leveraging our comrades in all things ERP, the Casai and OSI project teams worked together to create exactly the right solution to streamline property management and all of the minute details it involves.

*“ We are in a very traditional industry [hospitality], but we are also building something new. We needed more flexible solutions that we could integrate together to form the best software for us. That's why we decided to go with Odoo. ”*

MARICARMEN HERRERIAS  
CHIEF OPERATIONS OFFICER, CASAI



# Result

## Casai uses newfound Odoo capabilities to launch further growth

Throughout the project, OSI team members provided extensive knowledge transfer and training for the Casai technical team. With this “training in the trenches together” approach, Casai developed in-house Odoo customization and development skills, giving them the tools they need to continue to be successful with Odoo as their business ramps up speed.

We’re happy to announce that Casai will be leveraging their newly instituted Odoo capabilities to pursue further growth. Having worked so closely together throughout this project, we’ve seen what Casai is capable of in terms of initiative and execution—the Casai experience is, truly, special. And with Odoo tools now supporting their operations, we know that they will be more than successful as Nico, Maricarmen, and team bring the Casai experience to their next target frontier: **Columbia.**

### Today, Casai successfully uses Odoo for:

- + Accounting
- + Property Management
- + Sales & CRM
- + Integration with Guesty
- + Inventory Management
- + Purchasing
- + RMA
- + Projects
- + Human Resources



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