

Whatsapp All in One Connector With Chat API Business Account User Document

Overview

Whatsapp is an immensely popular chatting app used by 1.5 Billion people worldwide. It has an easy interface and can be used powerfully with Odoo. Pragmatic has developed an Odoo app which allows users to use the Whatsapp Application to send messages via Odoo. We can send messages from Contacts, Sales, Accounts invoice, Accounts Payments, Credit Notes, Delivery orders, Point of sale, Purchase orders, Project Task, CRM Lead, Payment Reminder, User signup page via the same application. Let us have a look at how this works inside Odoo.

Features

- Robust, Reliable and Server based and it can handle large volumes of Messages
- Permission to enable whatsapp messages on Sales orders, Purchase order, Accounts invoice/payments, Delivery orders
- Send message Configuration
 - Add order to get Signature:to whatsapp Messages
 - Add to chatter
 - product information in messages such as order amount.
 - Add product details in message such as name and other details:
- In CRM, when a lead or opportunity is created then a message will be sent to the salesperson.
- In Project Management when a task is created then a WhatsApp message will be sent to the assigned user.
- If user sends a reply to task message as done then in odoo project task state is changed to done
- Send a Payment reminder message to the customer.
- Send messages to single or multiple Contacts within Odoo along with multiple attachments in different formats such as doc, pdf, image, audio, video

- In the Point of sale Odoo app when an order is confirmed, send order details message to customer
- Send a message when a user signs up on the Odoo website page.
- Check mobile number exists in whatsapp

Configuration

It is difficult to get a signup for WhatsApp for business directly and get access to the API as the signup process takes too long. Hence, it is better to sign up for third party whatsapp API services such as Chat API.

You need to sign up for a Chat Api account: using the URL <https://app.chat-api.com/login> and click on [Create an account](#)



Create an account

Get Started with WhatsApp's Official API and get Instant access at zero setup fee

Email *

accounts@pragtech.co.in

Password *

.....

Password (Confirm) *

.....

Country *

 India



I read and accept [terms and conditions](#)

CREATE MY ACCOUNT

Already have an account? [Log in](#)

After Account Creation You need to click on the Business API → Buy Access / Create a new Business API project

The screenshot shows the Chat API dashboard. The left sidebar contains navigation options: Dashboard, API ACCOUNTS (Payments), DEVELOP (Testing, API Docs, Link constructor, File to Base 64, VCard generator, SDK-generator), and SERVICES (Business API, Shared Team Inbox (NEW), Api Chain (BETA)). The main content area features a green header with 'Get official' and 'Enterprise WhatsApp Business API'. Below this, a text block states: 'Profitable access to WhatsApp Business API via Chat API features a convenient and easy messaging gateway. Zero setup fee, no markups, quick startup.' A warning box says: 'Be careful when choosing the number to connect: the number connected to the API cannot be used in the WhatsApp application'. Three buttons are visible: 'Buy access' (highlighted with a red box), 'Instructions', and 'API Docs'. A 'Prices' section is partially visible at the bottom.

OR

The screenshot shows the 'Project creation' step 1 of 2. The left sidebar is similar to the previous screenshot, with 'Business API' selected under 'SERVICES'. The main content area has a light grey background with the heading 'Select project type'. Four options are presented: 'WhatsApp', 'Business API' (highlighted with a red box), 'Dev', and 'Docker'. A 'Continue →' button (also highlighted with a red box) is located at the bottom left. The right side of the screen features a teal background with an illustration of a person working on a laptop.

After completing payment and mobile number verification, you will get a new Business API instance, endpoint, token, and phone number displayed on the instance.

The screenshot shows the Chat API dashboard for a Business API instance. The instance name is 'Paradis Produce' with WABA #402283. The API URL is `https://api.chat-api.com/instance3` and the token is `o3v0...`. The instance is live and has a phone number `9189...3`. A green banner indicates the account is paid for 17 days until 25.06.2022 15:16. The statistics section shows 0 Business-Initiated, 0 User-Initiated, and 1 Free entry point conversations, with a total cost of \$0.00. A sidebar on the left contains navigation options like Dashboard, API ACCOUNTS, and DEVELOP.

In odoo go to Settings → General Settings → Whatsapp Integration and add details like endpoint and token copied from chat-api

The screenshot shows the Odoo Settings page. The 'Settings' menu is highlighted in the top left. The 'General Settings' section is selected in the left sidebar. The 'Whatsapp Integration' section is highlighted with a red box. It contains the following fields: 'Whatsapp Endpoint' with the value `https://api.chat-api.com/inst` and 'Whatsapp Token' with a masked value `.....`. The 'reCAPTCHA' section is also visible, with a checked checkbox and a 'Generate reCAPTCHA v3 keys' button.

Configuration of bidirectional messages (send & receive messages from whatsapp in Odoo):

In odoo activate developer mode Goto Technical → System Parameters → web.base.url → Copy Value

Chat API Configuration:-

In the webhook url you need to paste the value (copied from odoo web.base.url) after that add **"/whatsapp/responce/message"**

Note: For odoo version 15 , use **'response'** instead of **'responce'**.

Webhook url : base url + /whatsapp/responce/message

Ex : <https://staging.pragtech.co.in/whatsapp/responce/message>

Base url: <https://staging.pragtech.co.in/>

Controller path : /whatsapp/responce/message

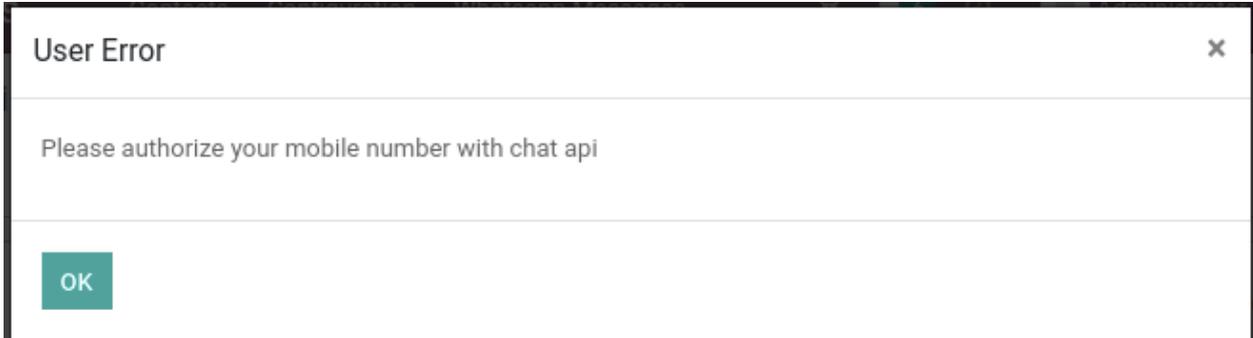
In the configuration of the chat API refer to the below example & enable Guaranteed Hooks click on **save**.

The screenshot shows the Odoo Chat API configuration page for a business account named 'Paradis Produce'. The interface includes a sidebar with navigation options like Dashboard, API ACCOUNTS, and various development tools. The main content area displays account details, a list of configuration parameters, and an 'Instance settings' section. In the 'Instance settings' section, the 'Webhook URL' is set to 'https://staging.pragtech.co.in/whatsapp/response/message' and the 'Guaranteed Hooks' toggle is turned on. A red box highlights these two settings. Other visible elements include a 'Statistics' panel showing 0 business-initiated conversations and 1 free entry point, and a 'Templates' table with columns for Name, Category, and Status.

Name	Category	Status
order_confirmation	TICKET_UPDATE	approved (0)
example flight con	TICKET_UPDATE	approved

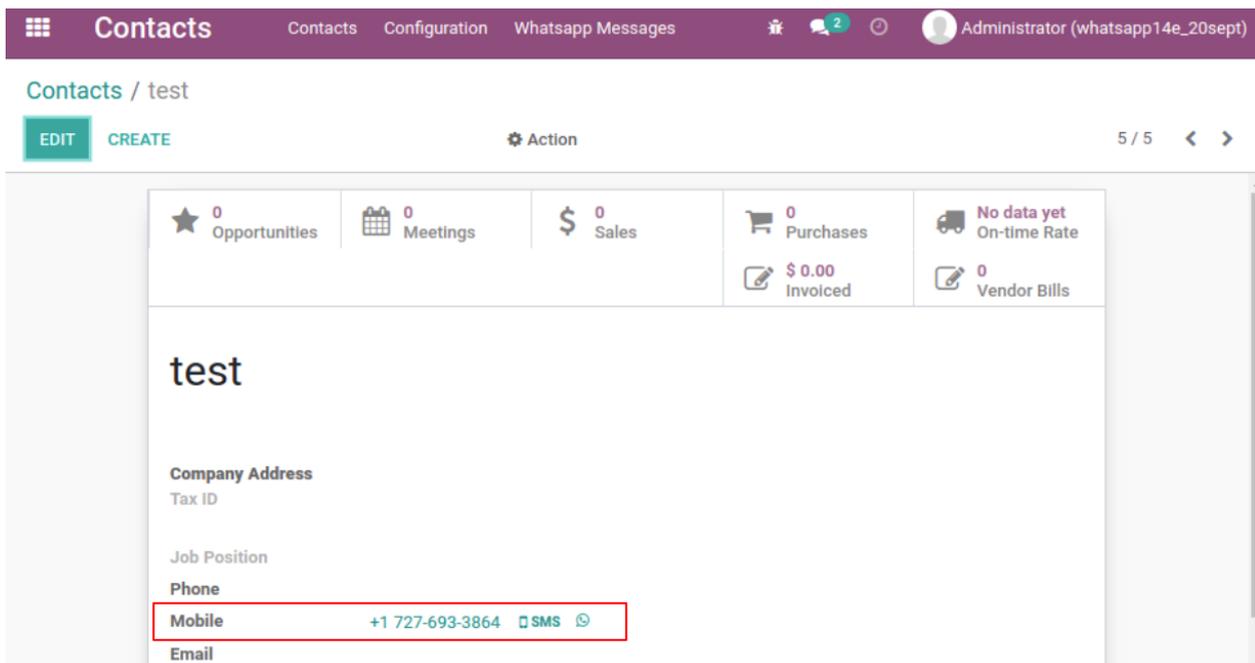
Preconditions to send a WhatsApp message to any contact:

1. Make sure you have only one database(in case multiple databases are there then bidirectional functionality will not work).
2. Check you have an https odoo url.
3. If the Endpoint and token are not set correctly in the general settings then message will not send
4. If any of the above conditions are not met, the user may receive the following warning message



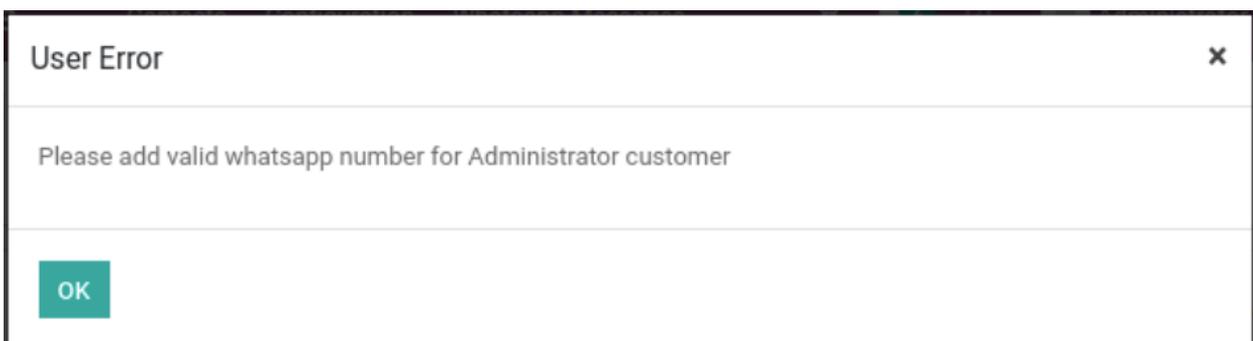
5. Need to add correct country in contacts:

In the contact form, if a country is not added and only adds the mobile, a random country code will be added to the mobile and the message may not be sent



6. Not registered on WhatsApp number:

If the mobile number is not registered on WhatsApp, you will get a user error. Please add valid whatsapp number for *customer_name* customer



How does it work?

1) Send Messages To Contacts

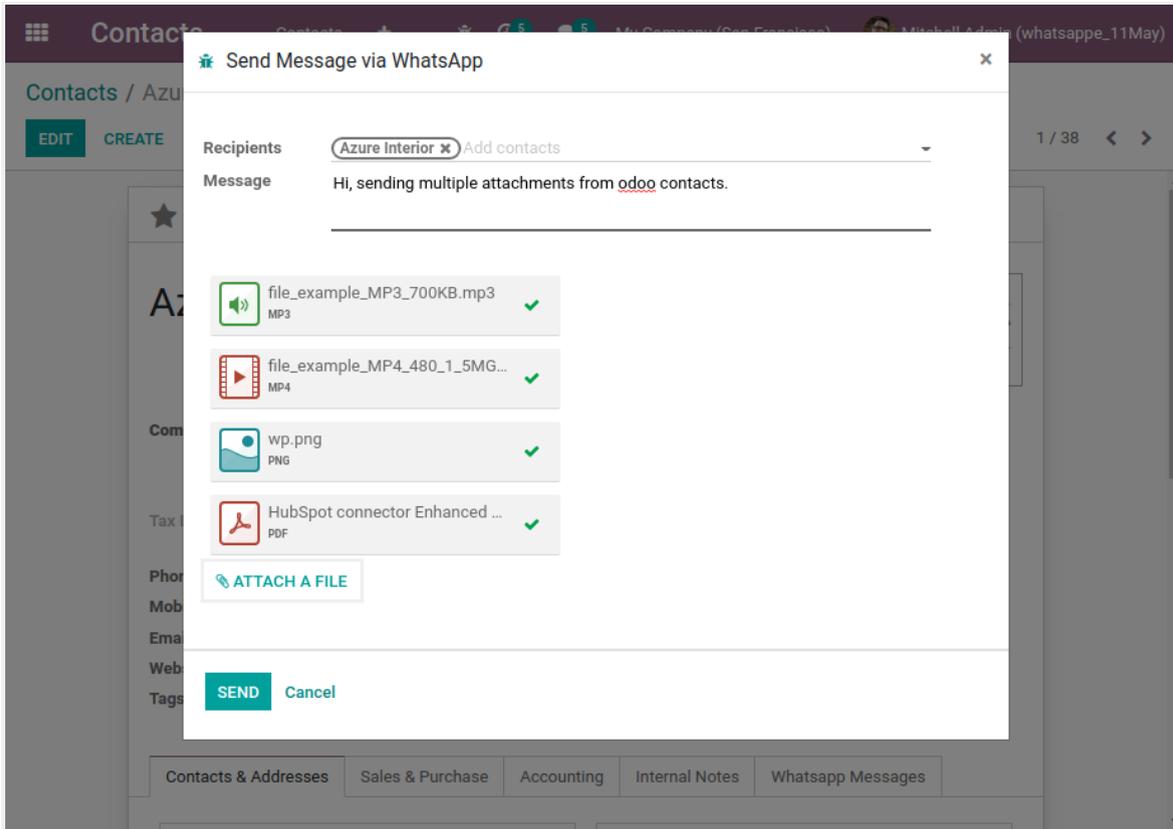
To send a message to a specific contact, open any contact that has a correct WhatsApp mobile number. On the form view click on the WhatsApp logo button present after the mobile number. This will open a new wizard where you can add your message, an attachment like a document, image or video, then click the SEND button

The screenshot shows a CRM interface for a contact named 'Azure Interior'. The contact details are as follows:

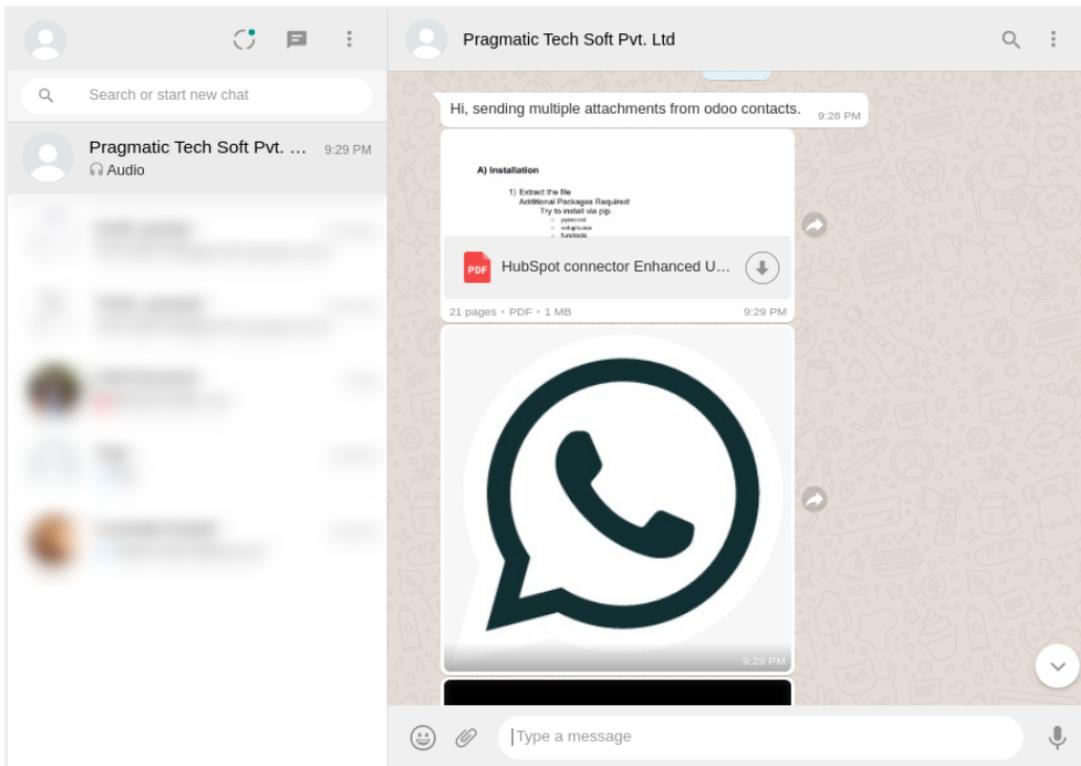
- Company Address:** 4557 De Silva St, Fremont 94538, India
- Phone:** +91 87093 10505 (SMS icon)
- Mobile:** Mobile +91 82: [redacted] 16 (SMS icon, WhatsApp icon)
- Email:** azure.interior24@example.com
- Website Link:** http://www.azure-interior.com
- Tags:** Services

The interface also shows a top navigation bar with 'Contacts', 'My Company (San Francisco)', and 'Mitchell Admin (whatsapp_11May)'. Below the contact details, there are tabs for 'Contacts & Addresses', 'Sales & Purchase', 'Accounting', 'Internal Notes', and 'Whatsapp Messages'. The 'Mobile' field and its associated icons are highlighted with a red box.

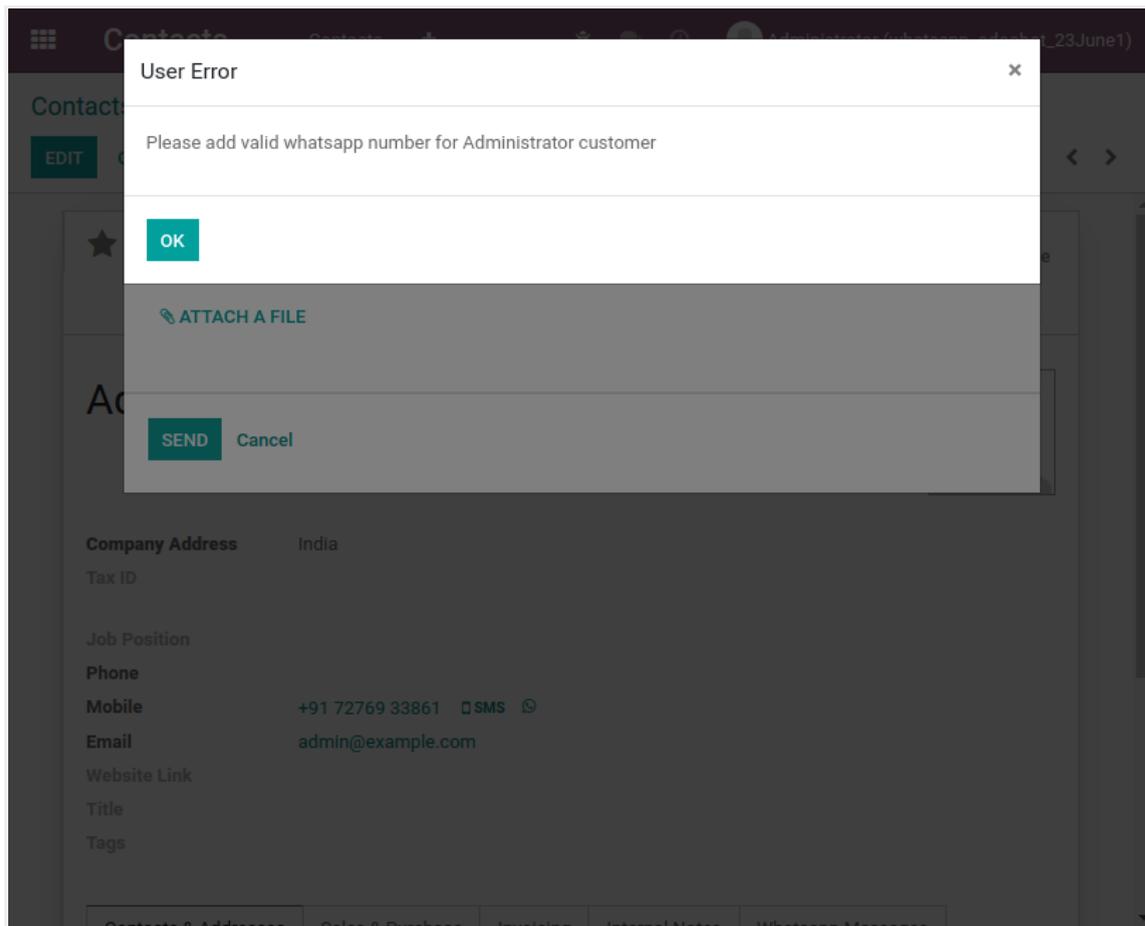
You can add your message, attachment as a document, image or video, then click on the SEND button



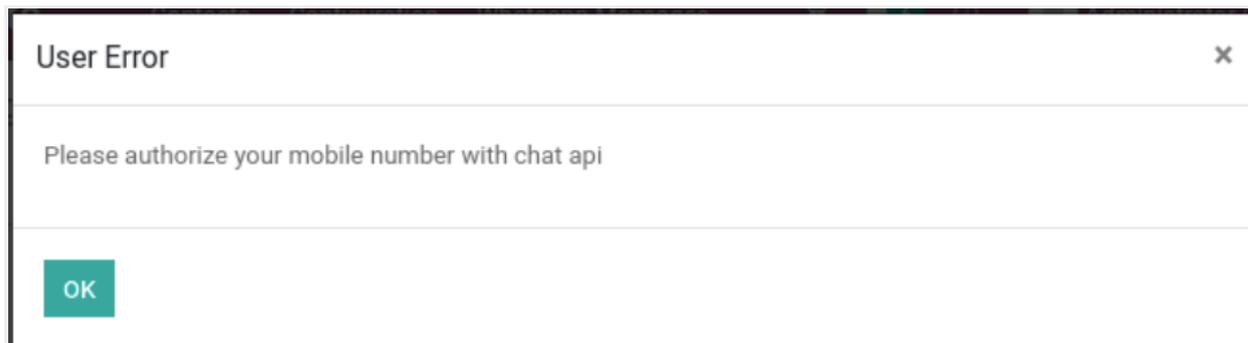
Message sent in whatsapp app (screenshot) of odoo contacts



When you click the send button in the wizard and if the mobile number is not registered in WhatsApp, a user Warning Message will be displayed.



When we click the Send button and if the preconditions are not met, the following error message appears (Authorize your mobile number with the Chat API).

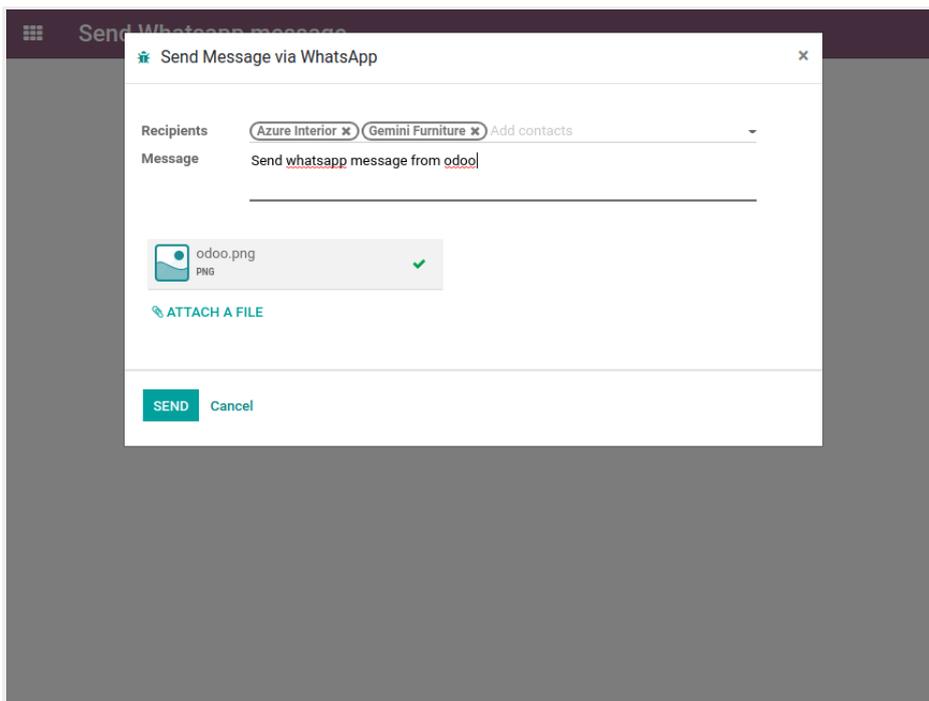


2) Send messages to multiple customers using Send Whatsapp message menu

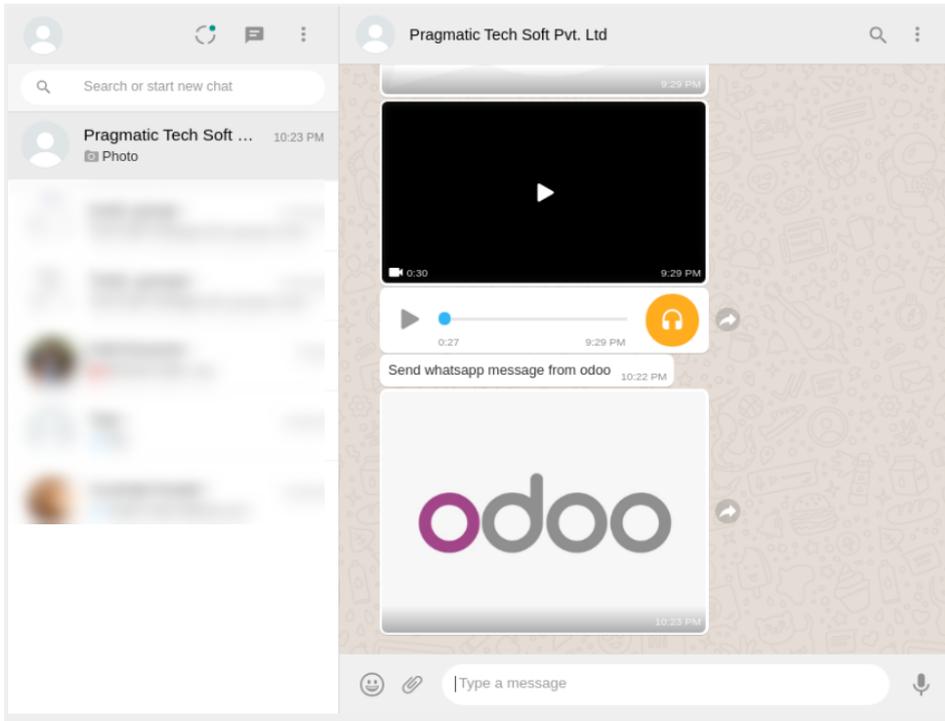
To send a message to multiple contacts. Click on Send Whatsapp Message menu this will open a new wizard. In this wizard only those recipients have a country & mobile. You can add your message, attachment like doc, image, video then click on the **SEND** button.



In the recipients field, only the contact will be filtered for which country and which mobile are defined. You can type any message, add an attachment like a document, image, video, then click the SEND button



Message sent in whatsapp app (screenshot) of odoo contacts



3) Provides Access Control permission of WhatsApp messages to all apps.

To activate the send WhatsApp message button from the Sale order, Invoice,Bill, Payment, Purchase Order and Delivery Order you must give the corresponding access rights.

The screenshot shows the Odoo Settings interface for Mitchell Admin. The 'Users / Mitchell Admin' page is open, displaying various settings categories. Two red boxes highlight specific WhatsApp features under the 'Other' section, with red arrows pointing to them from explanatory text.

Multi Companies
Allowed Companies: My Company (Chicago) My Company (San Francisco)
Default Company: My Company (San Francisco)

Sales
Sales: Administrator

Accounting
Accounting: Advisor

Administration
Administration: Settings

Other

Account Invoice Whatsapp Feature	<input checked="" type="checkbox"/>
Delivery Order Whatsapp Feature	<input checked="" type="checkbox"/>
Sale Order Whatsapp Feature	<input checked="" type="checkbox"/>

Services
Project: Administrator

Inventory
Inventory: Administrator
Purchase: Administrator

To enable send whatsapp message button from account invoice,delivery order & sale order

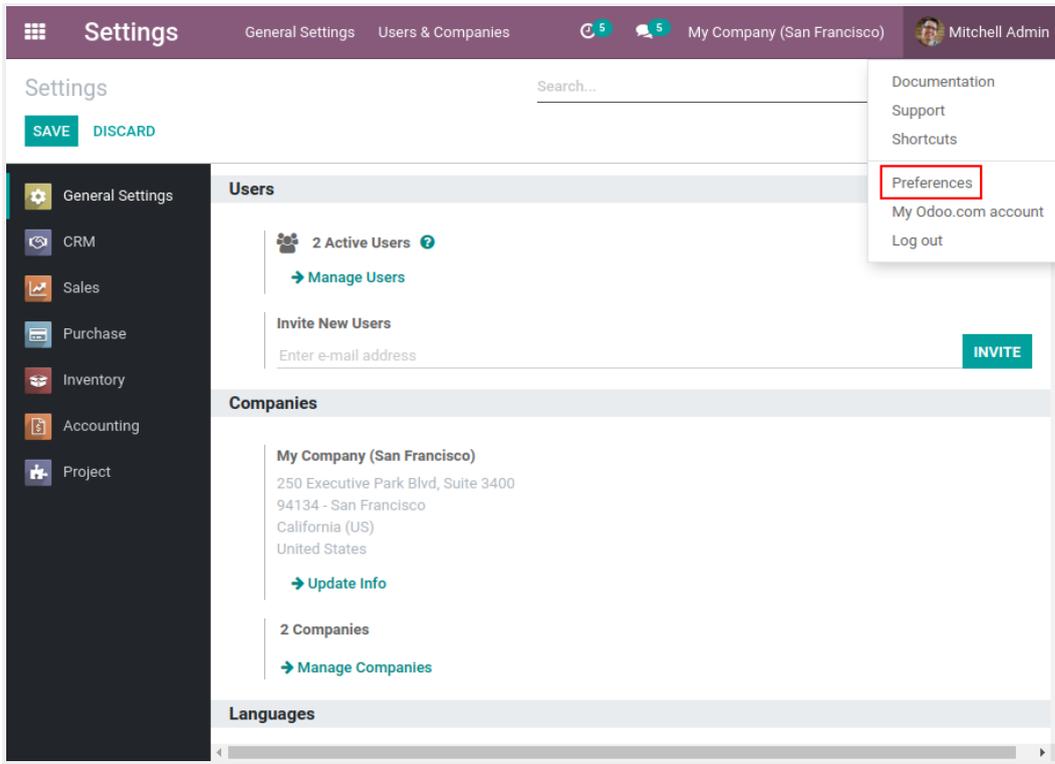
To enable send whatsapp message button from account payment & purchase order

Account Payment Whatsapp Feature	<input checked="" type="checkbox"/>
Purchase Order Whatsapp Feature	<input checked="" type="checkbox"/>

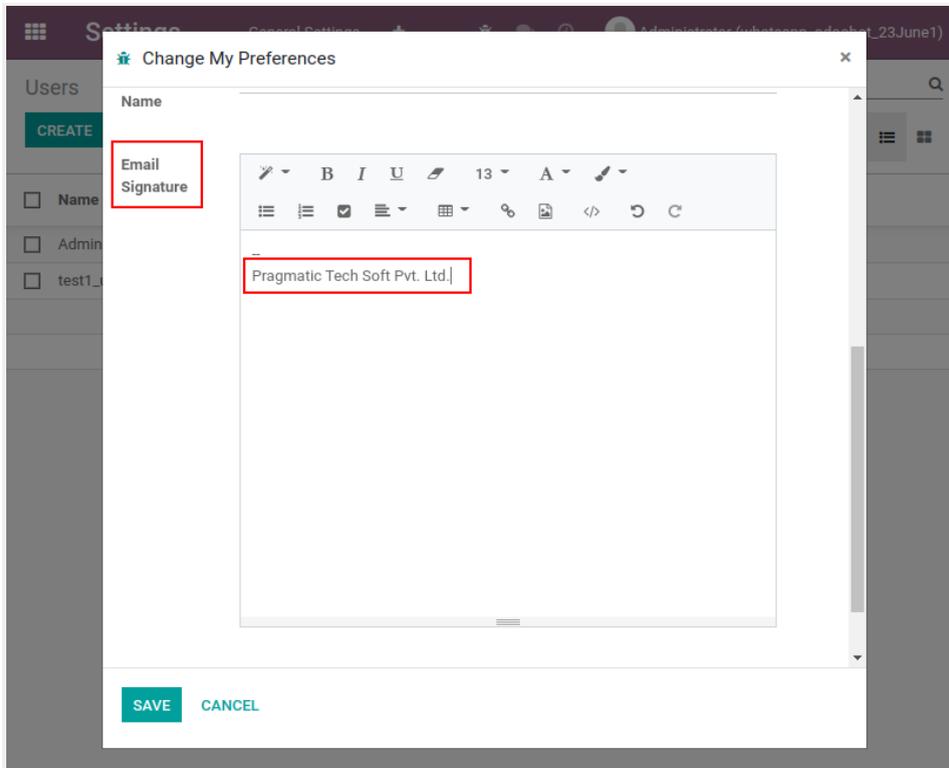
4) Add user signature to WhatsApp

Add signature to purchase order, account invoice, account payment, credit notes, purchase order and delivery note, CRM, project task.

Go to Settings -> User -> Preferences



Here we can add user signature



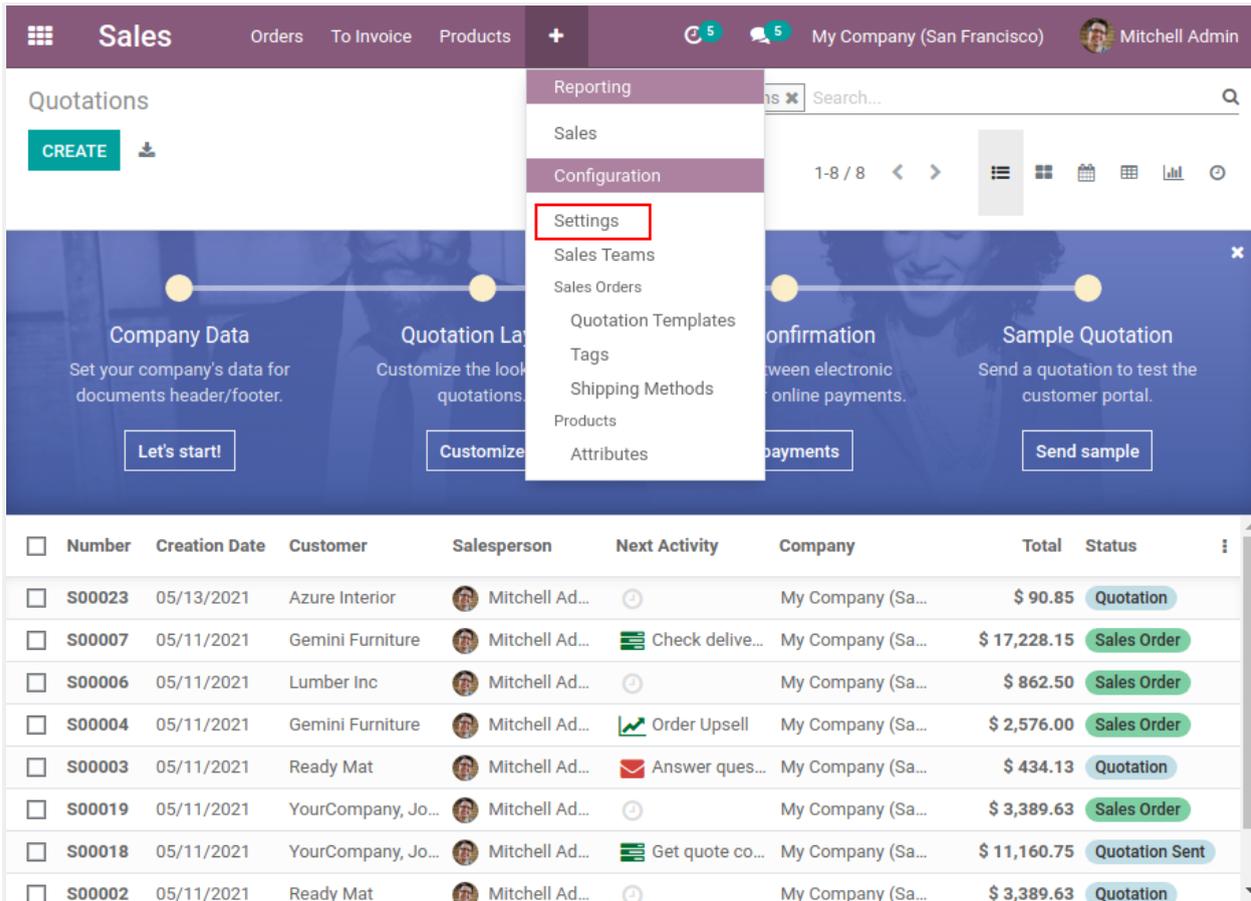
5) Sales order:

You can send a WhatsApp message to a customer's mobile number by clicking send WhatsApp message from the Sales Order form view.

Configuration:

You can send a whatsapp message by configuring Add signature, Add order information, Add product details, Add message in chatter.

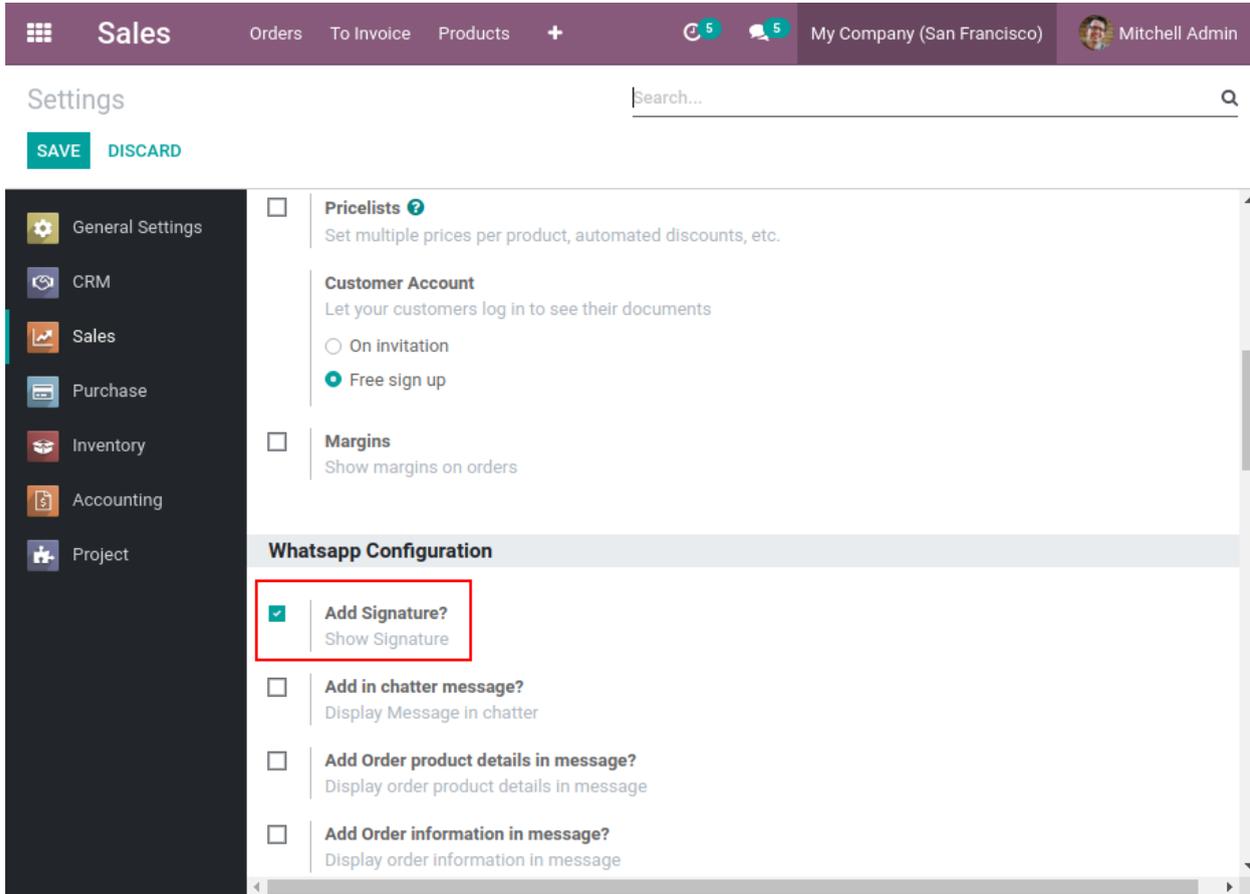
Goto Sales -> Configuration -> Settings



The screenshot shows the Salesforce Sales interface. The top navigation bar includes 'Sales', 'Orders', 'To Invoice', and 'Products'. A dropdown menu is open, showing 'Reporting', 'Sales', 'Configuration', and 'Settings' (highlighted with a red box). Below the menu, there are four cards: 'Company Data', 'Quotation Layout', 'Confirmation', and 'Sample Quotation'. At the bottom, there is a table of sales orders.

<input type="checkbox"/>	Number	Creation Date	Customer	Salesperson	Next Activity	Company	Total	Status
<input type="checkbox"/>	S00023	05/13/2021	Azure Interior	Mitchell Ad...		My Company (Sa...	\$ 90.85	Quotation
<input type="checkbox"/>	S00007	05/11/2021	Gemini Furniture	Mitchell Ad...	Check delive...	My Company (Sa...	\$ 17,228.15	Sales Order
<input type="checkbox"/>	S00006	05/11/2021	Lumber Inc	Mitchell Ad...		My Company (Sa...	\$ 862.50	Sales Order
<input type="checkbox"/>	S00004	05/11/2021	Gemini Furniture	Mitchell Ad...	Order Upsell	My Company (Sa...	\$ 2,576.00	Sales Order
<input type="checkbox"/>	S00003	05/11/2021	Ready Mat	Mitchell Ad...	Answer ques...	My Company (Sa...	\$ 434.13	Quotation
<input type="checkbox"/>	S00019	05/11/2021	YourCompany, Jo...	Mitchell Ad...		My Company (Sa...	\$ 3,389.63	Sales Order
<input type="checkbox"/>	S00018	05/11/2021	YourCompany, Jo...	Mitchell Ad...	Get quote co...	My Company (Sa...	\$ 11,160.75	Quotation Sent
<input type="checkbox"/>	S00002	05/11/2021	Ready Mat	Mitchell Ad...		My Company (Sa...	\$ 3,389.63	Quotation

a) Add Signature:



The screenshot shows the 'Settings' page in Odoo, specifically the 'Whatsapp Configuration' section. The 'Add Signature?' option is checked and highlighted with a red box. Other options include 'Add in chatter message?', 'Add Order product details in message?', and 'Add Order information in message?'. The left sidebar shows navigation options like General Settings, CRM, Sales, Purchase, Inventory, Accounting, and Project.

Settings | Search...

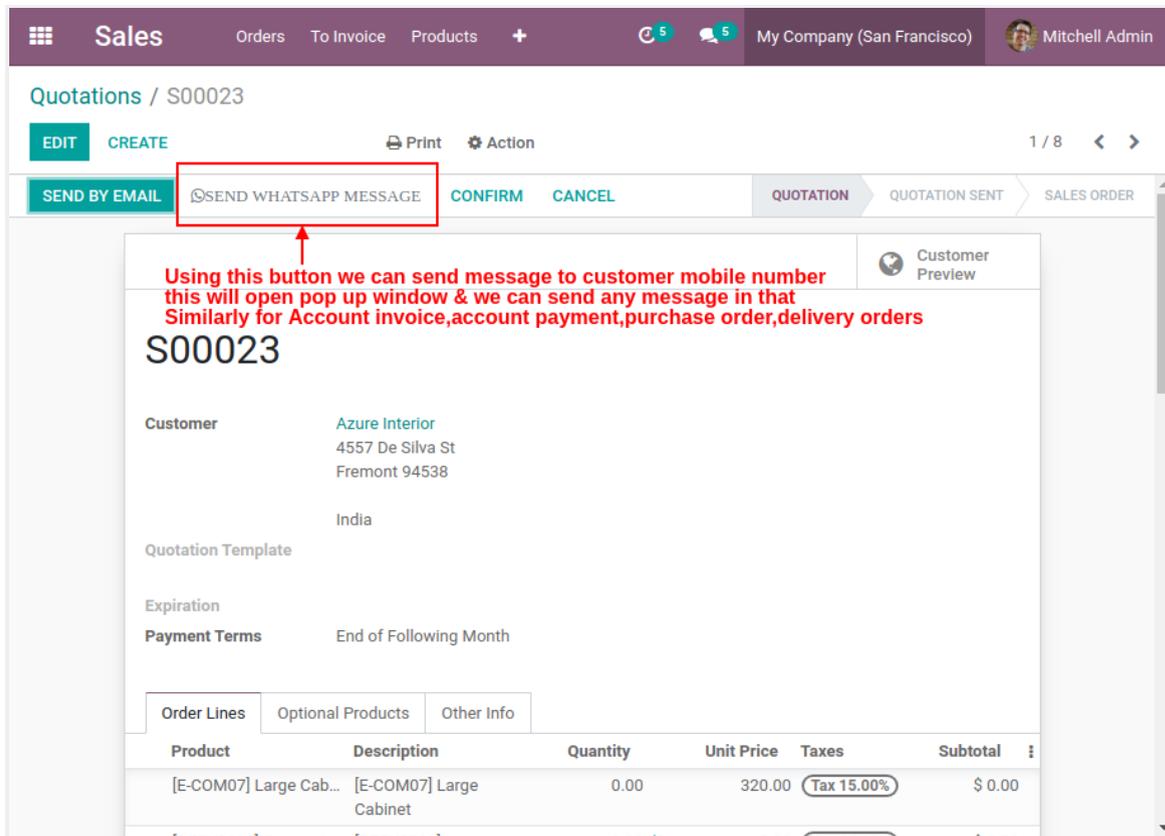
SAVE **DISCARD**

- Pricelists** ?
Set multiple prices per product, automated discounts, etc.
- Customer Account**
Let your customers log in to see their documents
 - On invitation
 - Free sign up
- Margins**
Show margins on orders

Whatsapp Configuration

- Add Signature?**
Show Signature
- Add in chatter message?**
Display Message in chatter
- Add Order product details in message?**
Display order product details in message
- Add Order information in message?**
Display order information in message

Go to the sales order form, click on the Send WhatsApp message button, the wizard will open. The signature is added to the message.



The screenshot shows the 'Quotations / S00023' form in Odoo. The 'SEND WHATSAPP MESSAGE' button is highlighted with a red box and an arrow. A red text box explains that this button opens a pop-up window for sending messages to the customer's mobile number. The form displays customer details for 'Azure Interior' and a table of order lines.

Quotations / S00023

EDIT **CREATE** **Print** **Action** 1 / 8 < >

SEND BY EMAIL **SEND WHATSAPP MESSAGE** **CONFIRM** **CANCEL** **QUOTATION** **QUOTATION SENT** **SALES ORDER**

**Using this button we can send message to customer mobile number
this will open pop up window & we can send any message in that
Similarly for Account invoice,account payment,purchase order,delivery orders**

S00023

Customer Azure Interior
4557 De Silva St
Fremont 94538
India

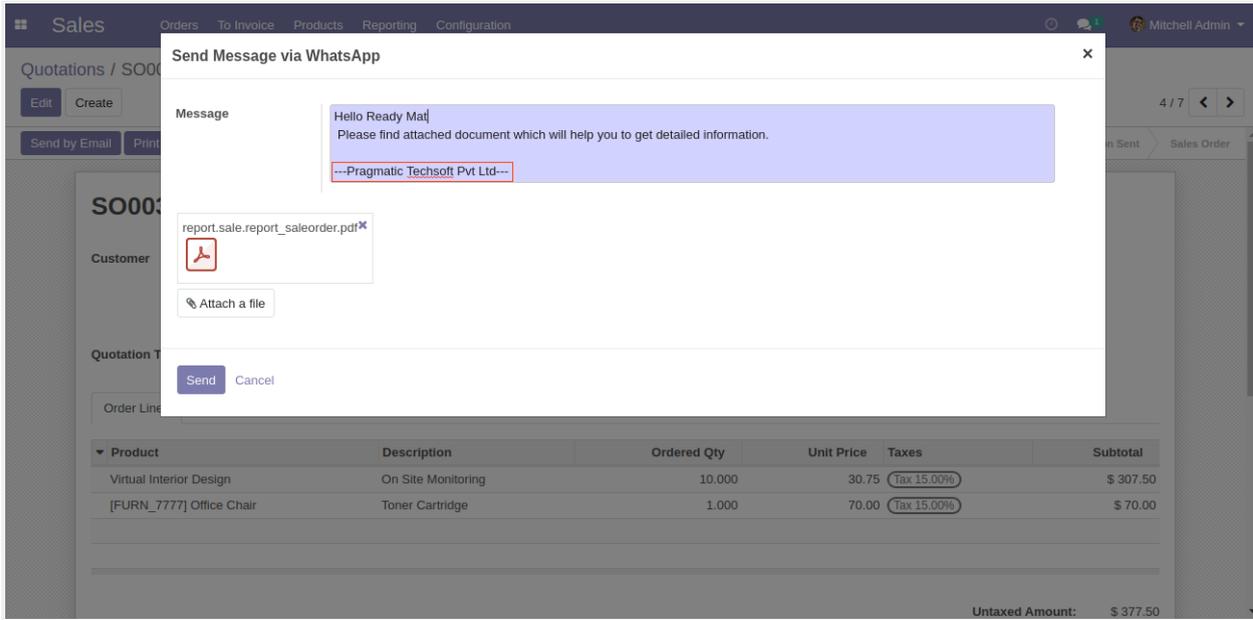
Quotation Template

Expiration

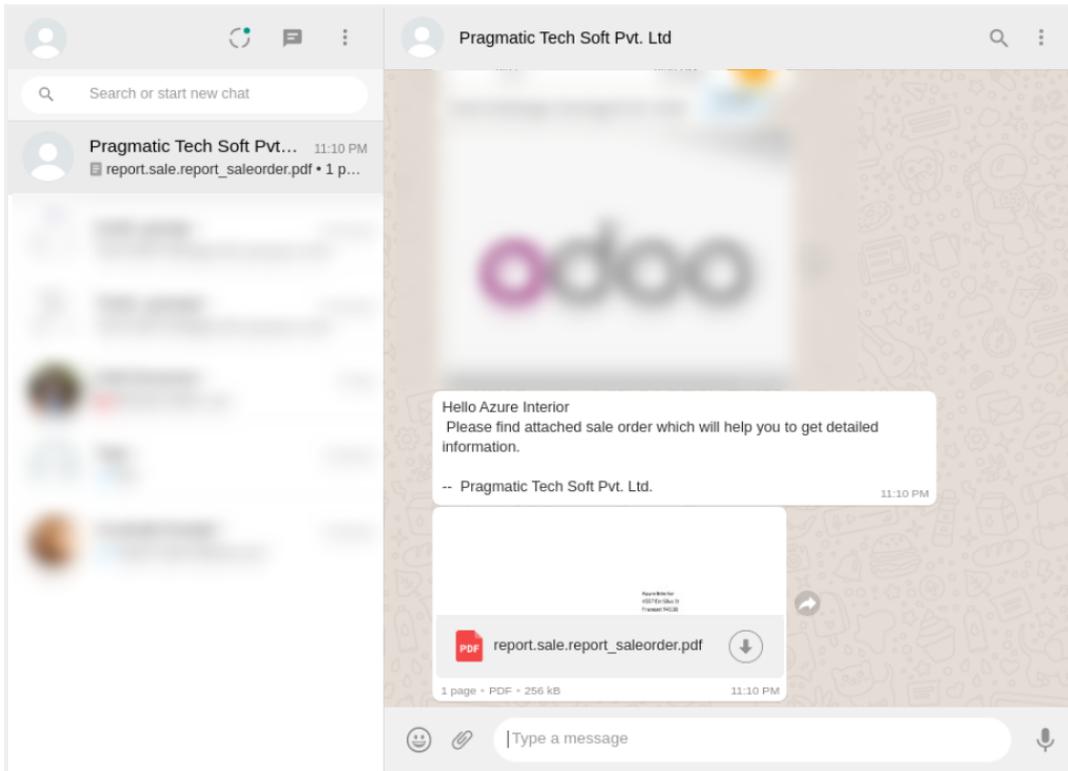
Payment Terms End of Following Month

Order Lines	Optional Products	Other Info			
Product	Description	Quantity	Unit Price	Taxes	Subtotal
[E-COM07] Large Cab...	[E-COM07] Large Cabinet	0.00	320.00	Tax 15.00%	\$ 0.00

Here you can see the signature is added in the WhatsApp message. Click the **Send** button and the message will be sent to the customer's mobile.

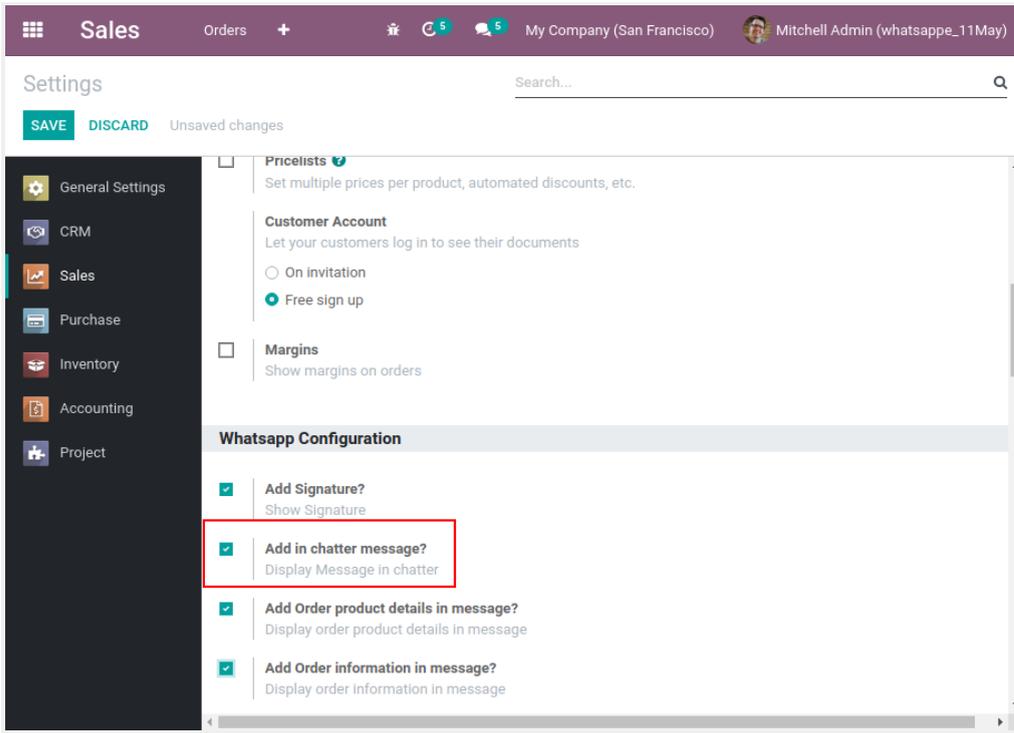


Message sent in whatsapp app (screenshot) of Sales Order by adding signature with attachment.

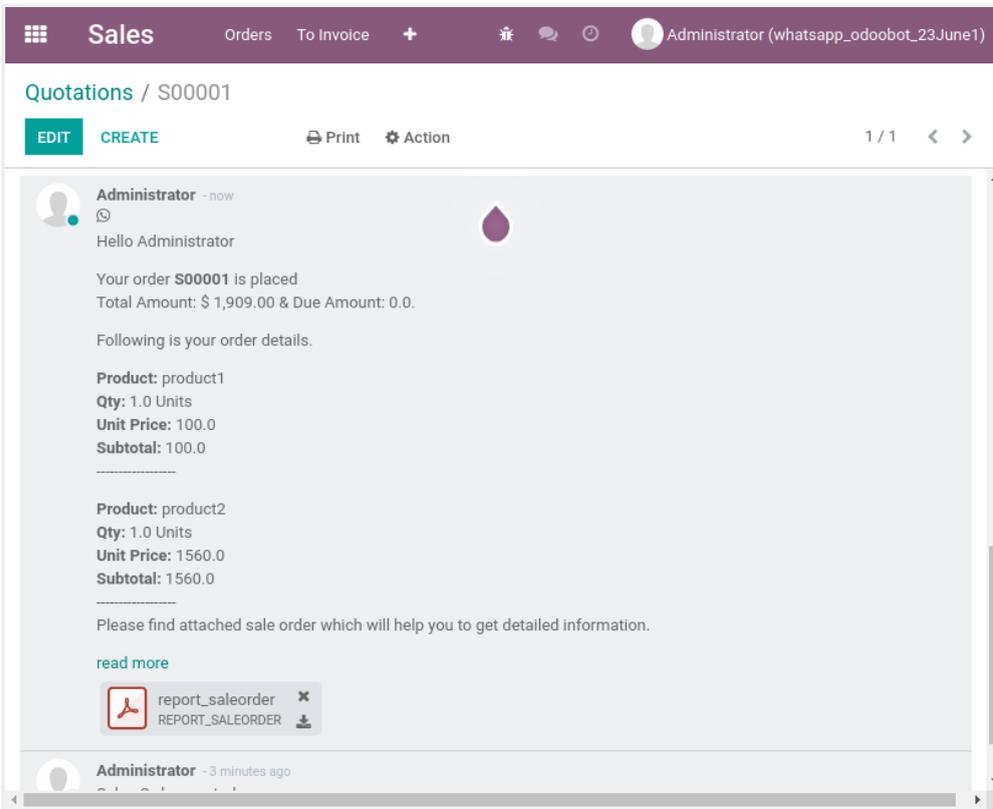


b) Add to chatter message:

If **Add in chatter message** is enabled, WhatsApp message will be added to chat with proper formatting and attachment.

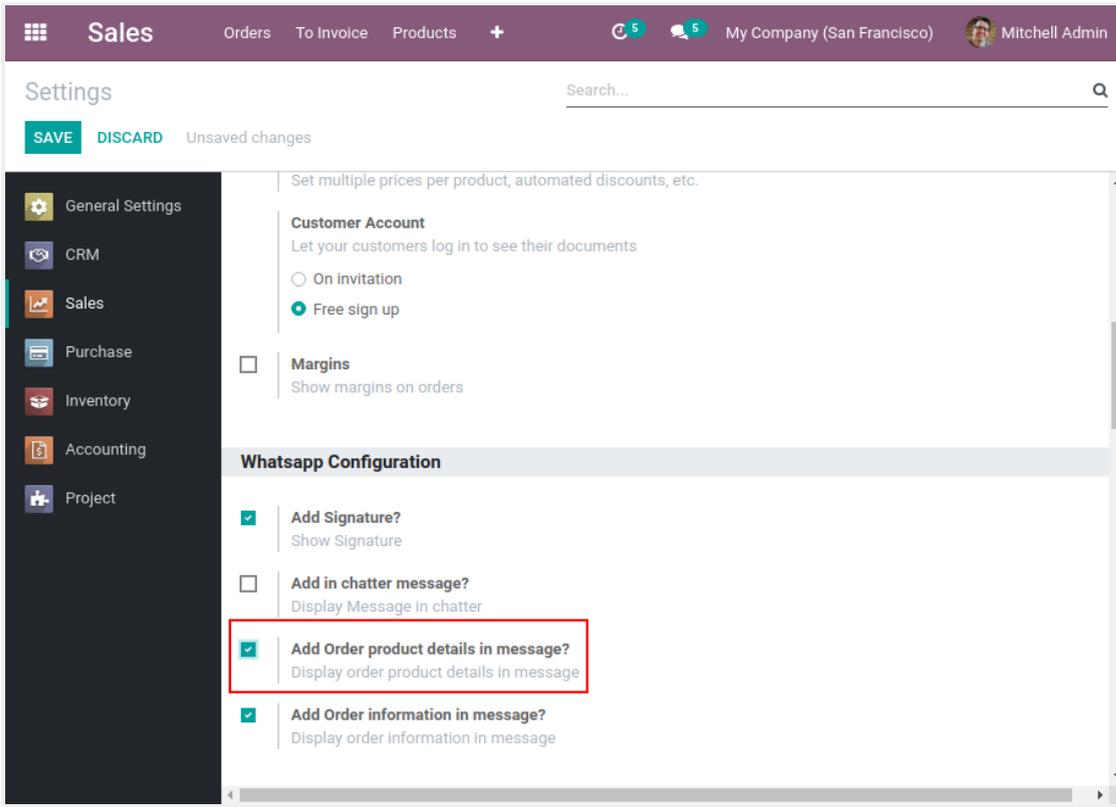


Whatsapp message sent successfully and will be tracked in message chatter with attachment



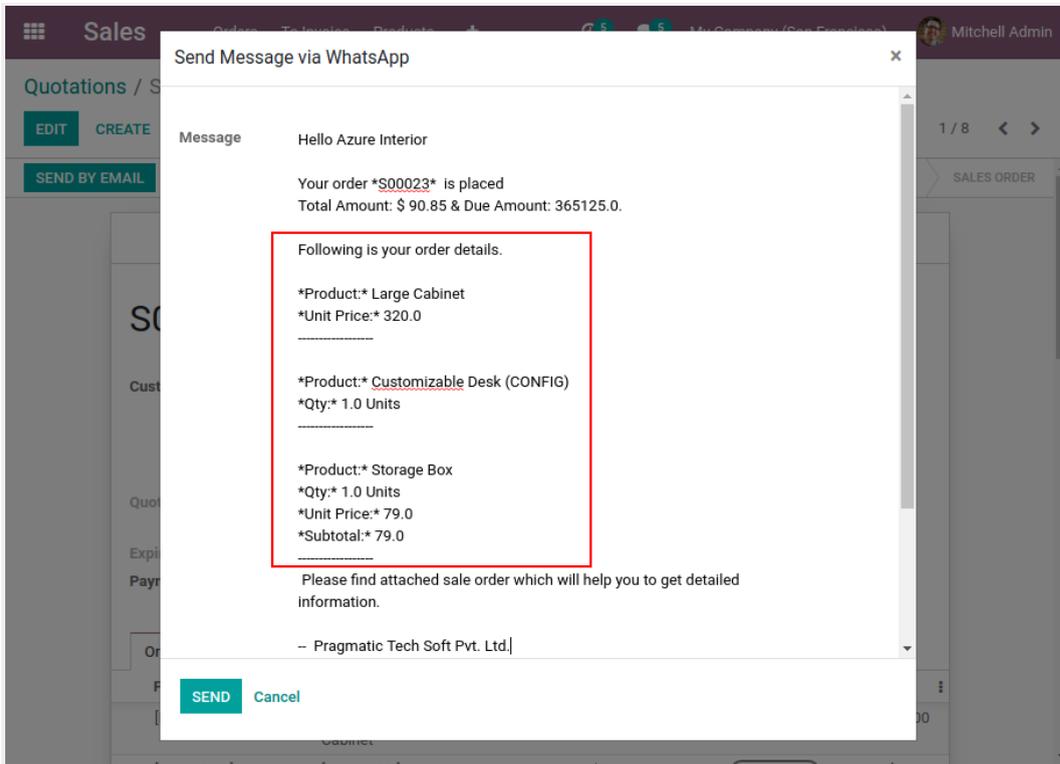
c) Order product details in message

If order product details are enabled then the product name, unit price, quantity and subtotal is added in the whatsapp message.

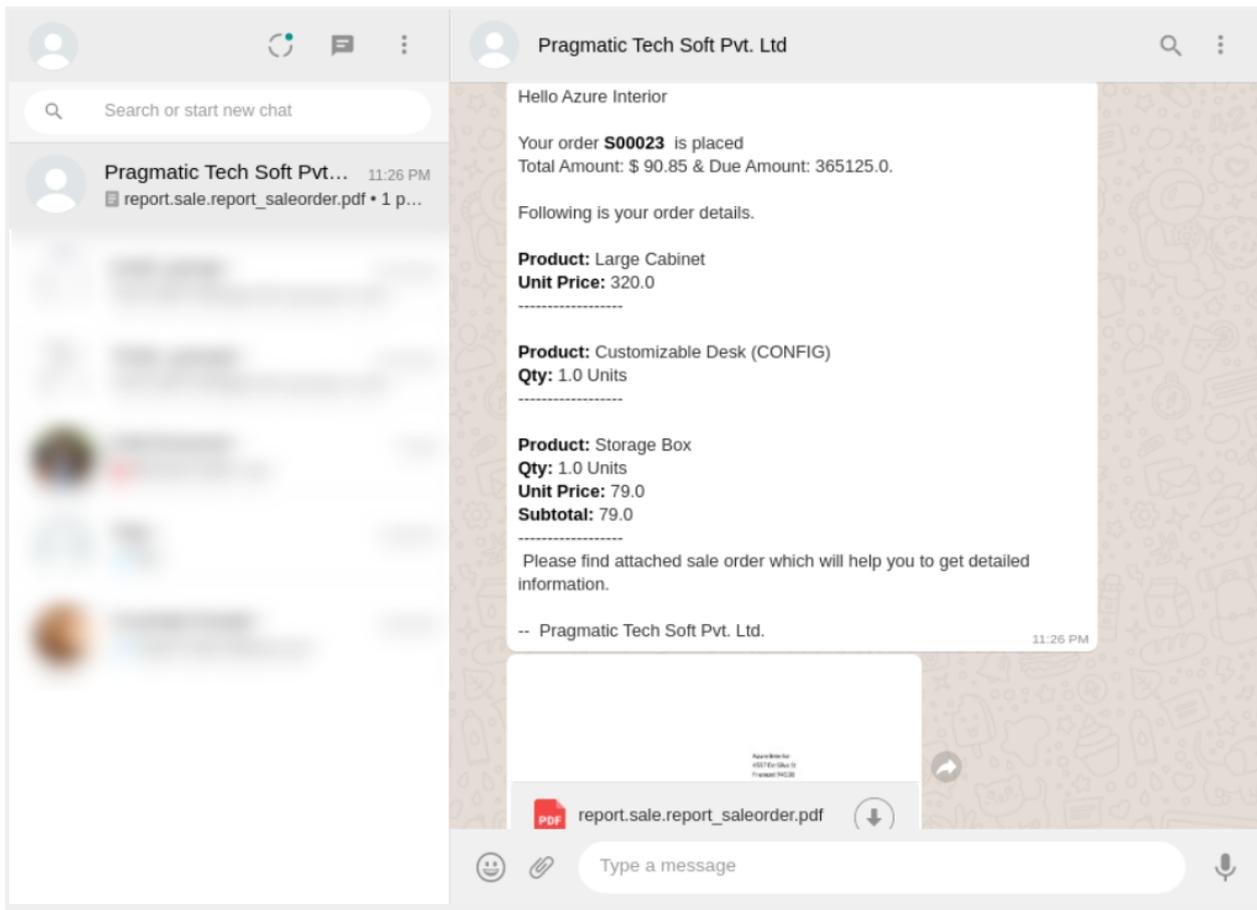


Product Order details added to message.

Click on send. Message is sent to the customer's mobile.

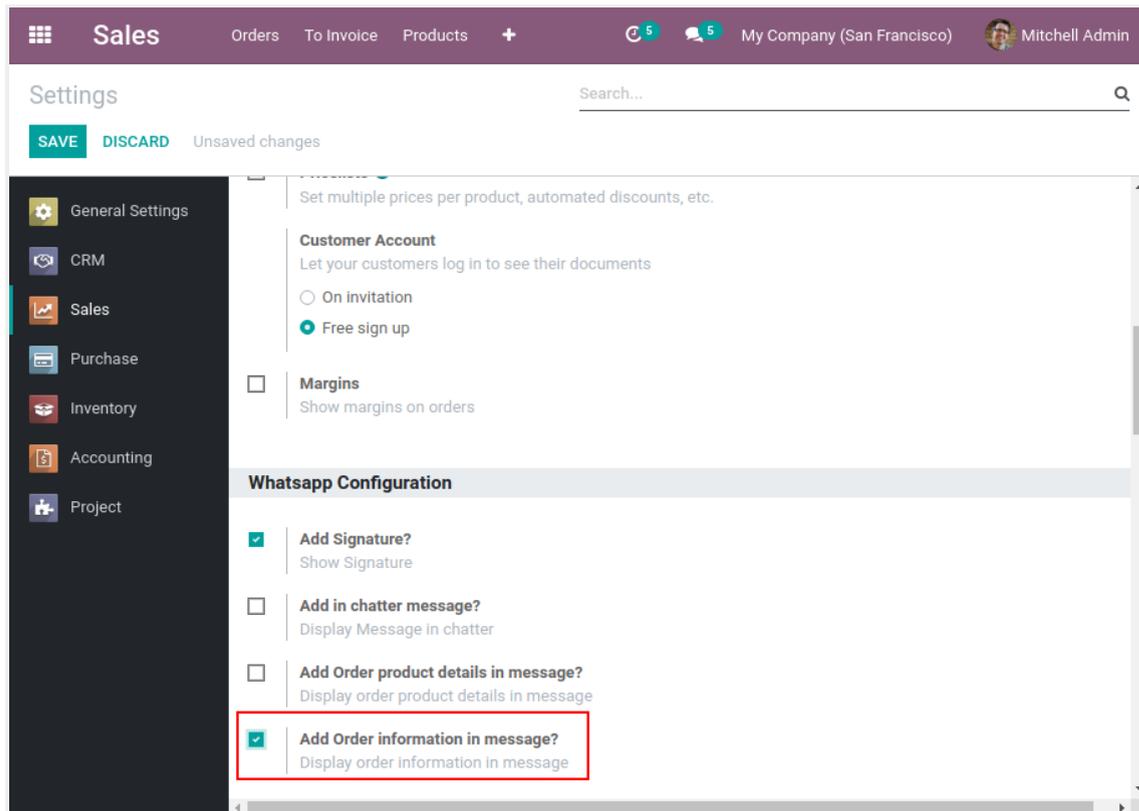


Message In whatsapp application(screenshot) from sale order by adding order product details.



d) Add order information in the message:

If the Add order information is enabled then the order number, order total amount is added to the whatsapp message.



Goto sale order form view click on Send Whatsapp message button. Order information is added to message

Click on send. Message is sent to the customer's mobile.

The screenshot shows a 'Send Message via WhatsApp' dialog box overlaid on a sales management interface. The dialog contains the following text:

Message Hello Azure Interior

Your order *S00023* is placed
Total Amount: \$ 90.85 & Due Amount: 365125.0.
Please find attached sale order which will help you to get detailed information.

-- Pragmatic Tech Soft Pvt. Ltd.]

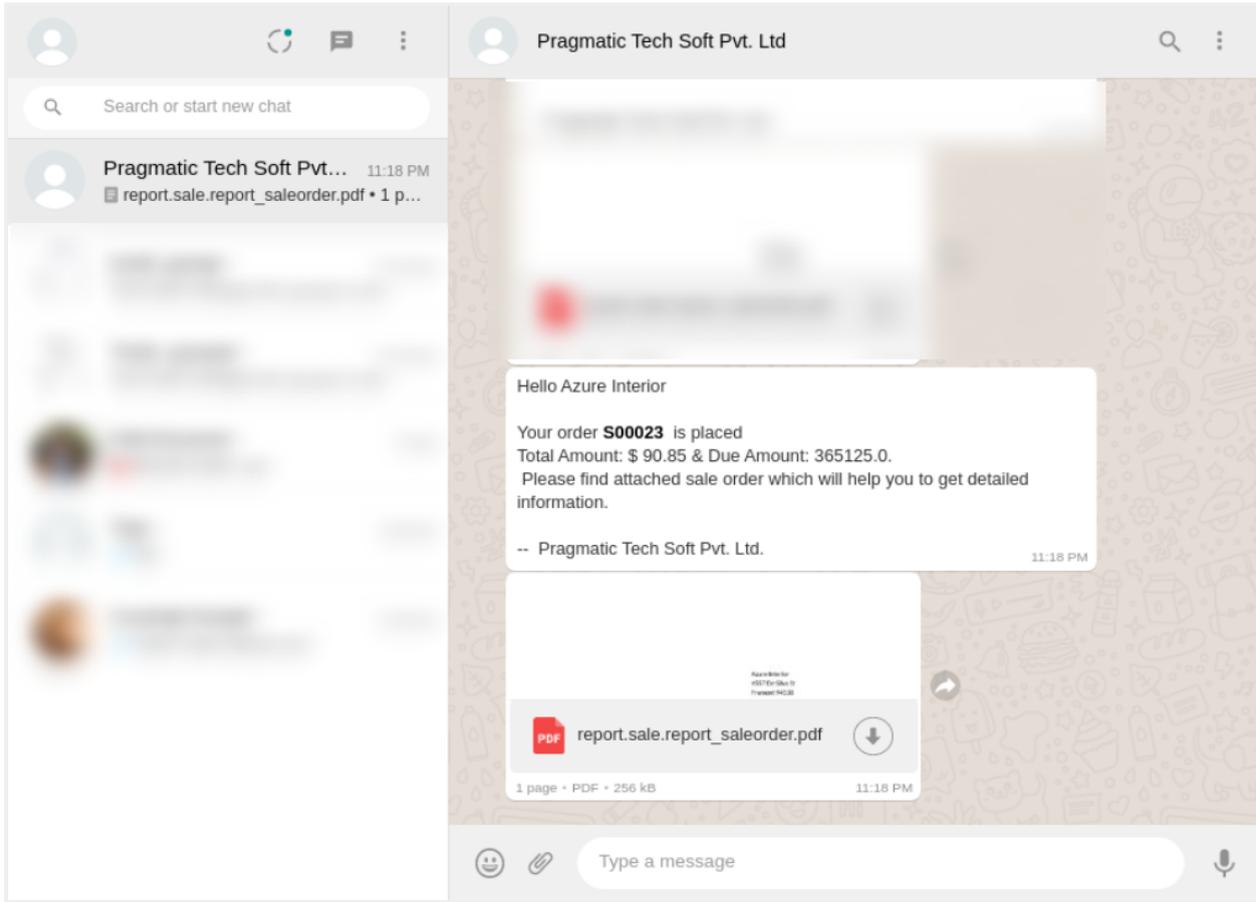
Below the text, there is an attached PDF file named 'report.sale.report_saleorder.pdf' with a green checkmark indicating it is ready to be sent. Below the file attachment is a link that says 'ATTACH A FILE'.

At the bottom of the dialog, there are two buttons: 'SEND' and 'Cancel'.

The background interface shows a 'Sales' header, a navigation menu with 'Quotations / S...', and a 'SALES ORDER' section. A table of order lines is visible at the bottom, with columns for Product, Description, Quantity, Unit Price, Taxes, and Subtotal.

Product	Description	Quantity	Unit Price	Taxes	Subtotal
[E-COM07] Large Cab...	[E-COM07] Large Cabinet	0.00	320.00	Tax 15.00%	\$ 0.00

Message in whatsapp application(screenshot) from sale order by adding order information with attachment.



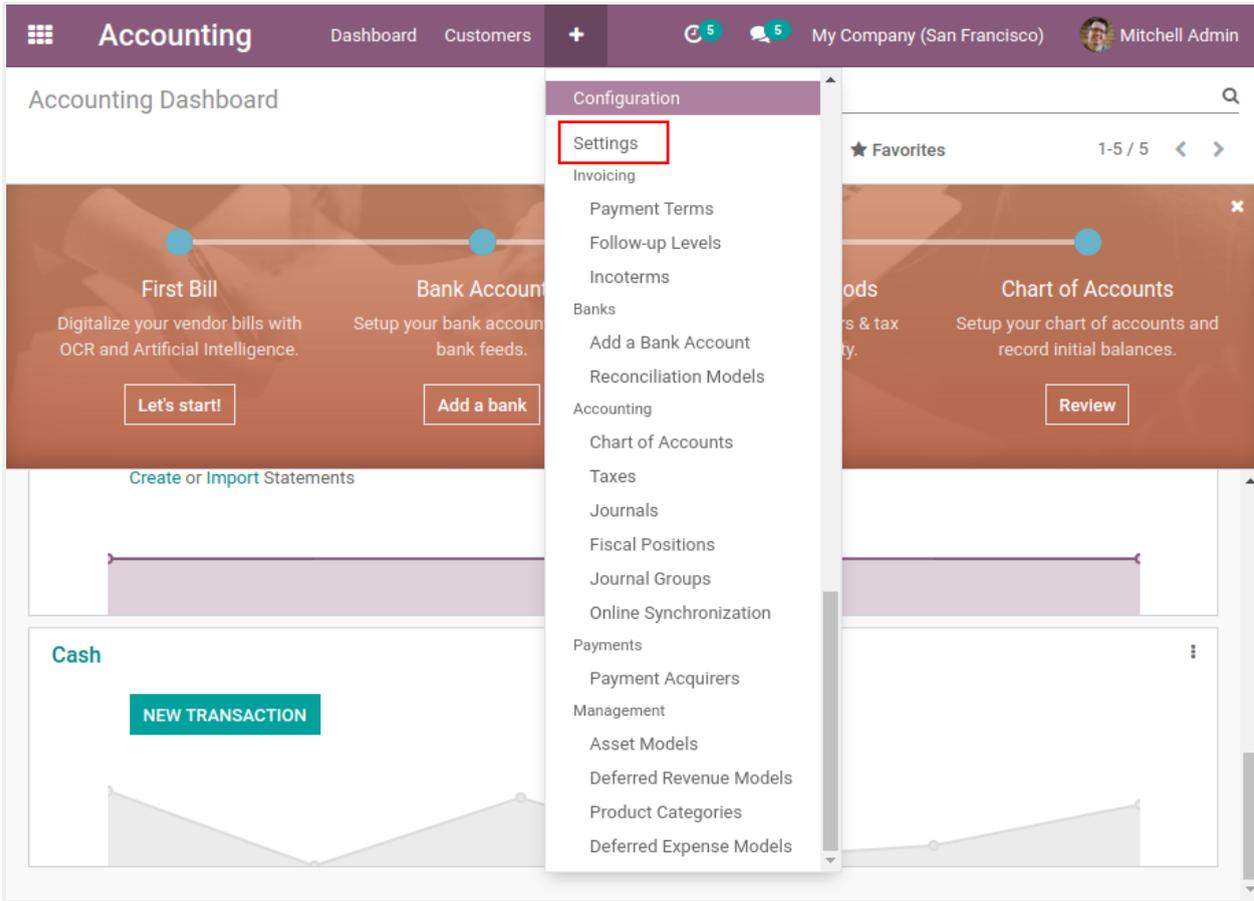
7) Accounts Invoice:

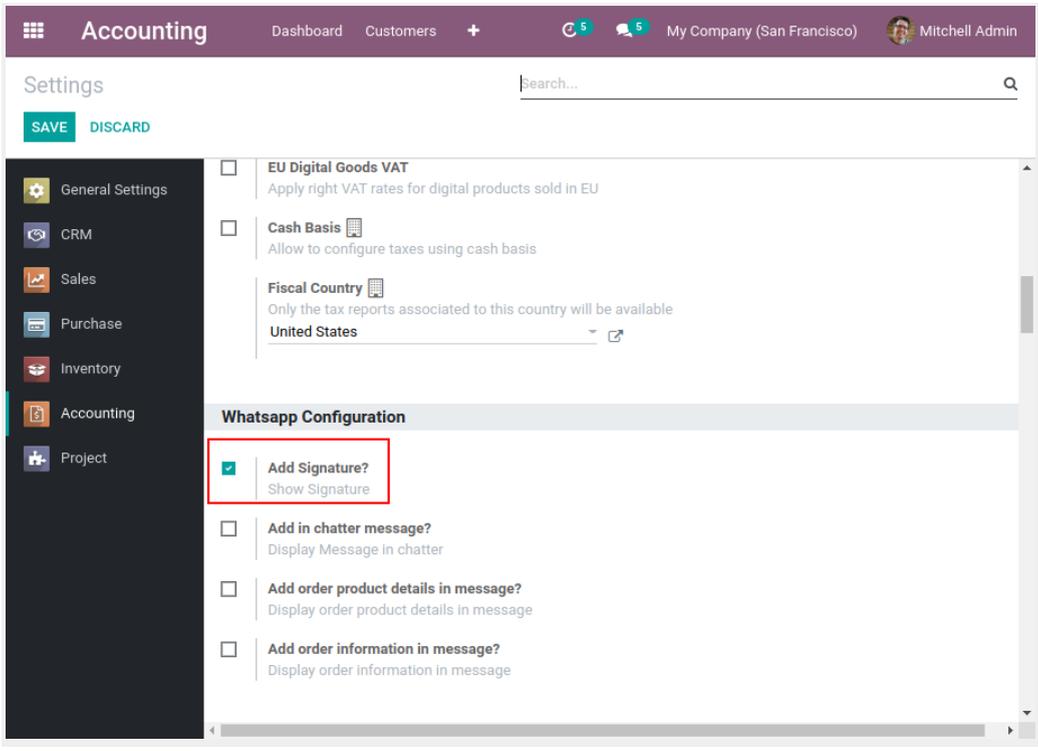
You can send a WhatsApp message to a customer's mobile number by clicking send WhatsApp message from the Account Invoice form view.

Configuration:

You can send a whatsapp message by configuring Add signature, Add order information, Add product details, Add message in chatter.

Goto Invoicing -> Configuration -> Settings

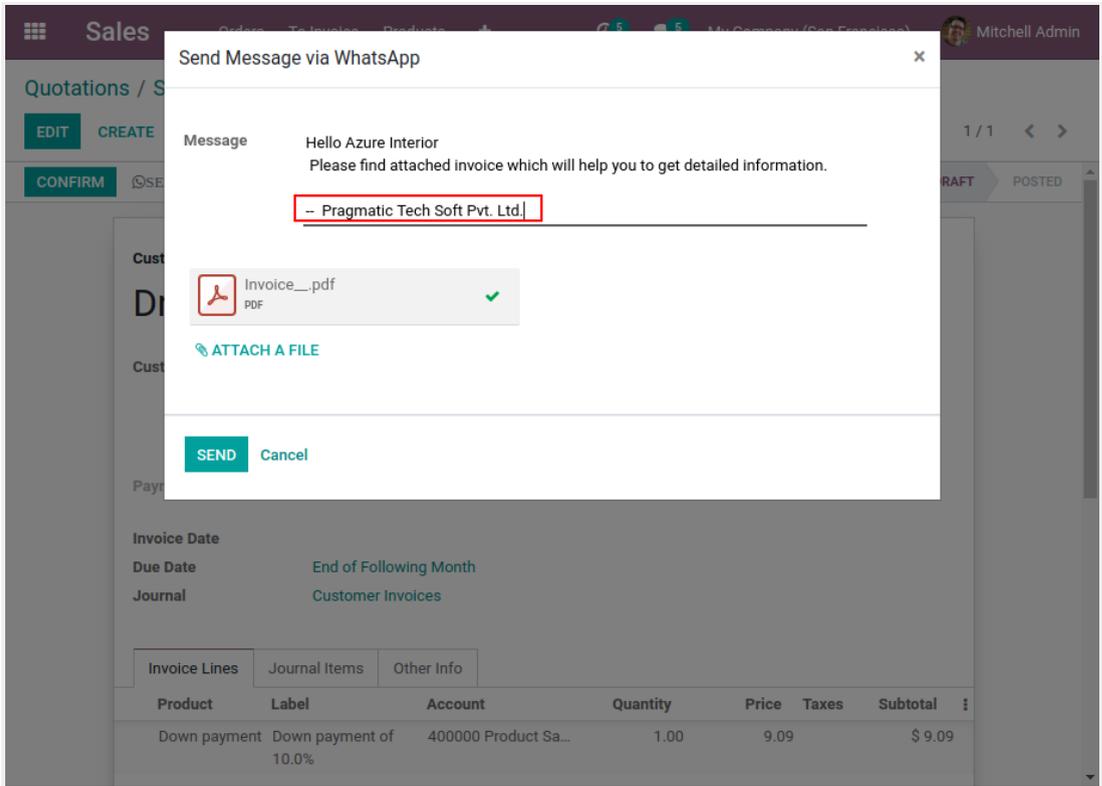




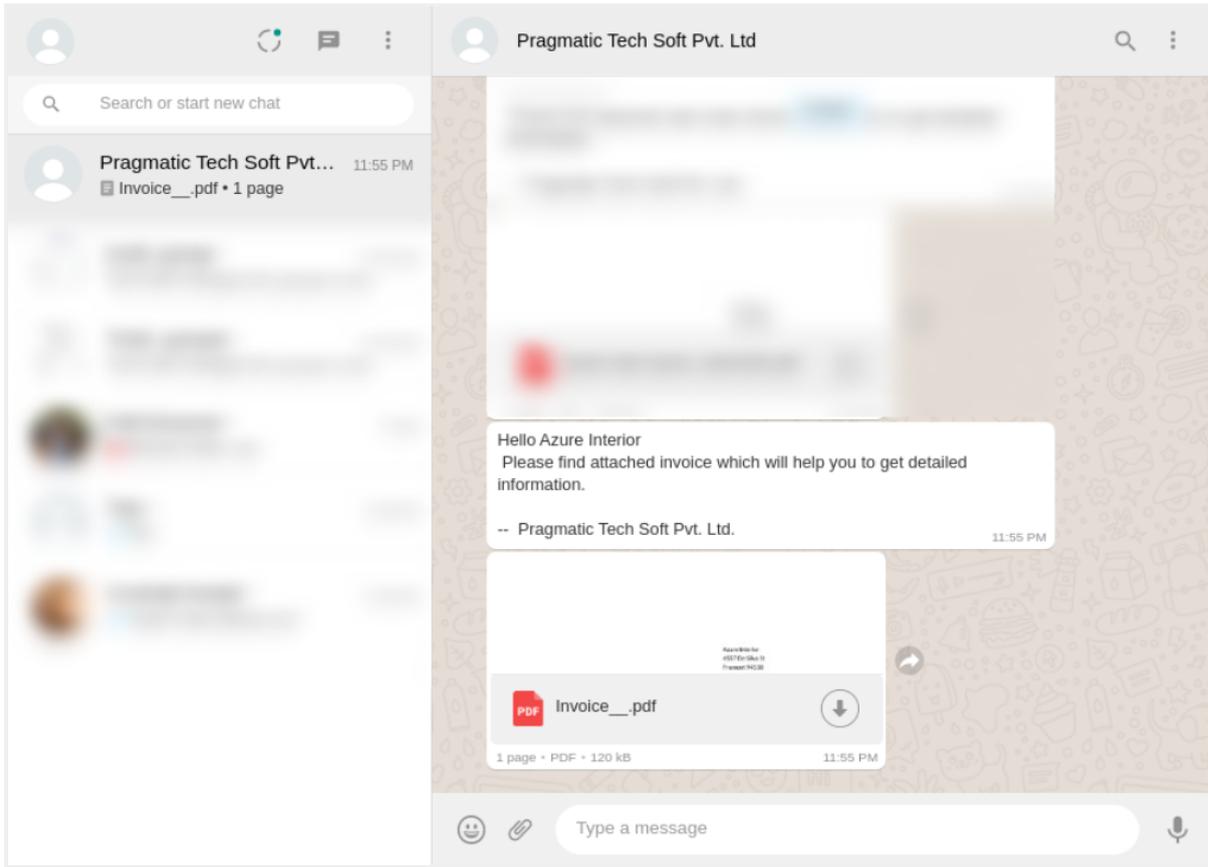
a) Add Signature:

Go to the account invoice form, click on the Send WhatsApp message button, the wizard will open. The signature is added to the message.

Click the **Send** button and the message will be sent to the customer's mobile.

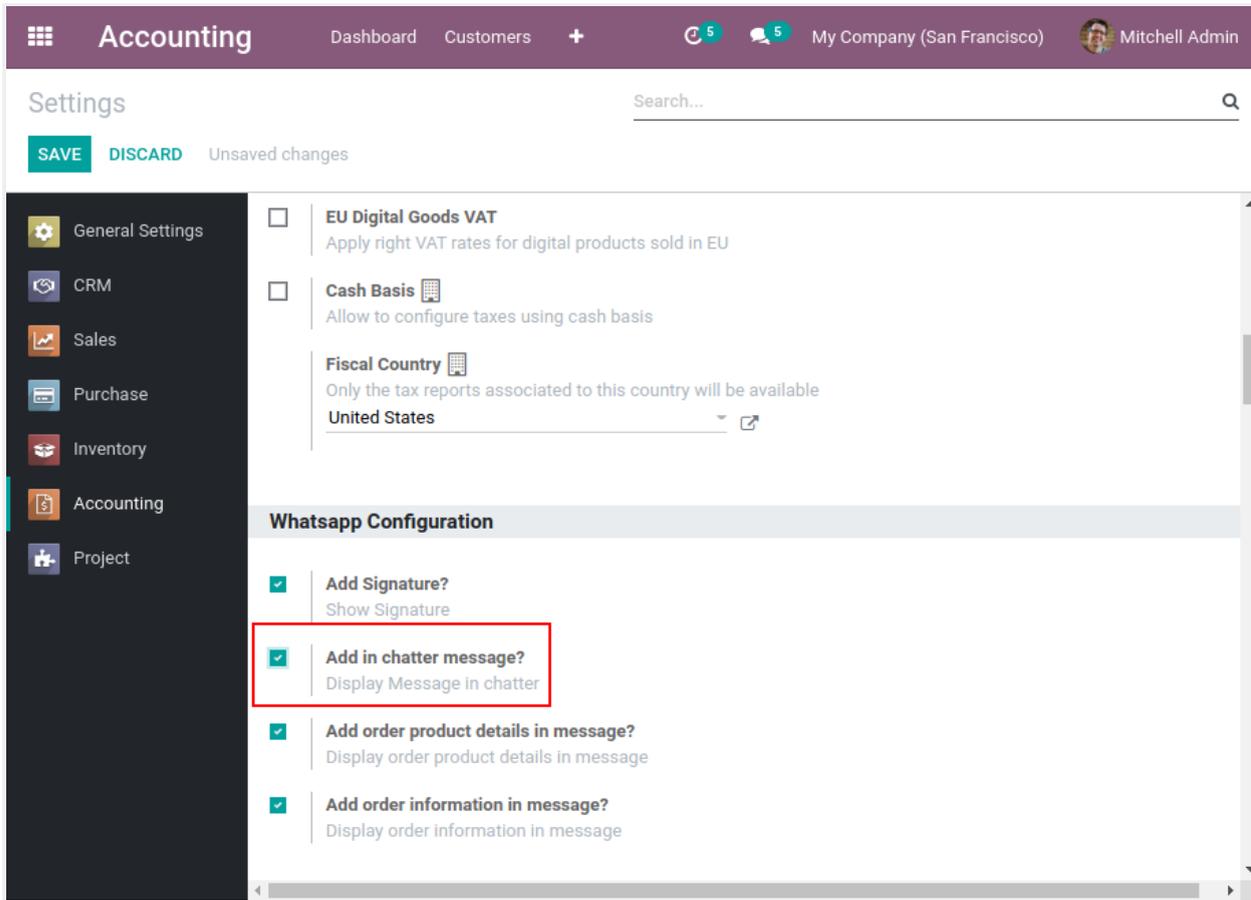


Message sent in whatsapp app (screenshot) of Account Invoice by adding signature with attachment.



b) Add to chatter message:

If **Add in chatter message** is enabled, WhatsApp message will be added to chat with proper formatting and attachment.



Whatsapp message sent successfully and will be tracked in message chatter with attachment

Sales Orders To Invoice + Administrator (whatsapp_odoobot_23June1)

Quotations / S00001
/ Draft Invoice INV/2021/09/0001

EDIT **CREATE** Print Action 1 / 1 < >

Administrator - now
Hello Administrator

Here is your invoice **draft invoice**
Total Amount: \$ 190.90 & Due Amount: 0.0.

Following is your order details.

Product: Down payment
Qty: 1.0
Unit Price: 190.9
Subtotal: 190.9

Please find attached invoice which will help you to get detailed information.

[read more](#)

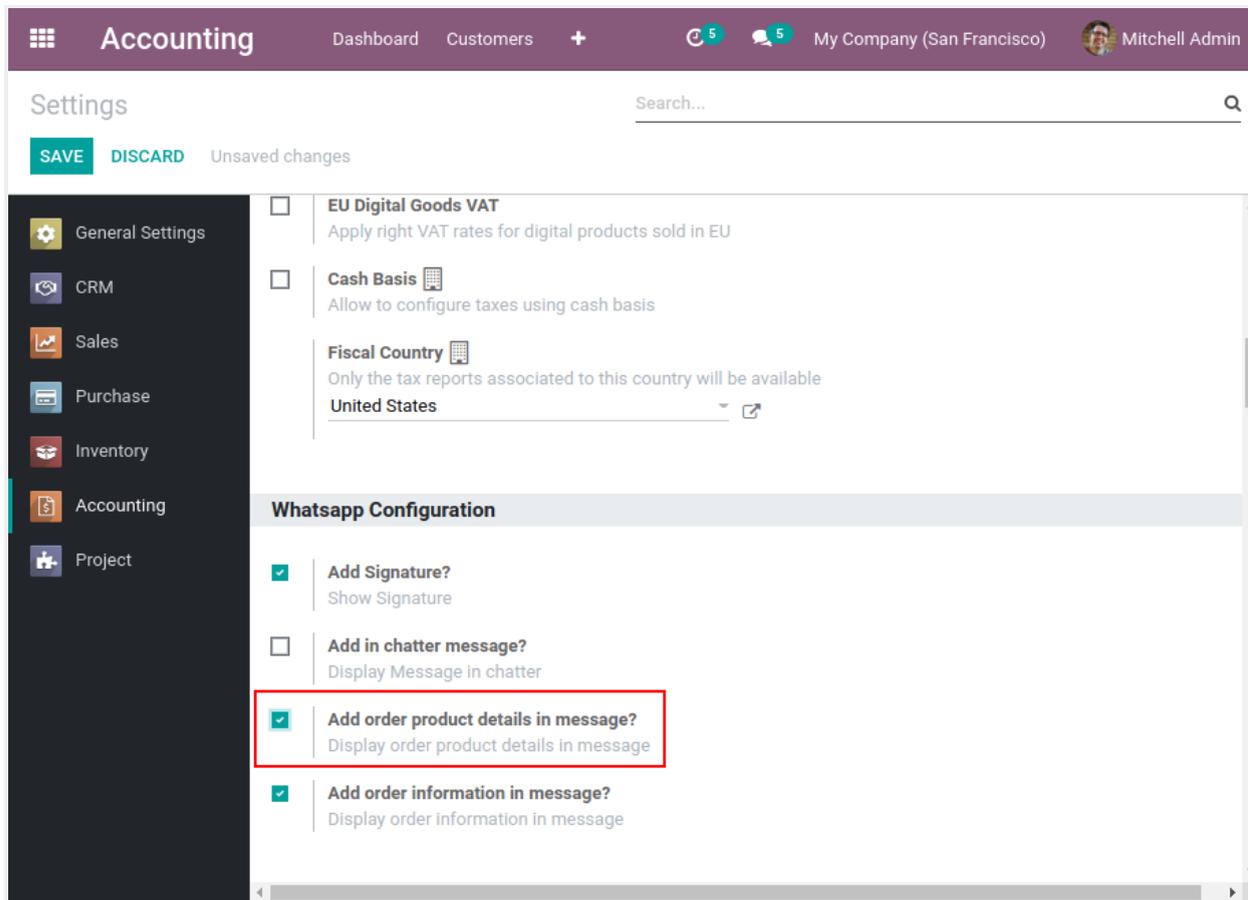
 report_invoice x
REPORT_INVOICE

Administrator - 5 minutes ago
This journal entry has been created from: [S00001](#)

Administrator - 5 minutes ago
Invoice Created

c) Add Order product details to message:

If order product details are enabled then the product name, unit price and quantity are added in the whatsapp message.



The screenshot shows the Accounting Settings interface. The top navigation bar includes 'Accounting', 'Dashboard', 'Customers', and a user profile 'Mitchell Admin'. The main content area is titled 'Settings' and contains a search bar and a 'SAVE' button. A sidebar on the left lists various settings categories: General Settings, CRM, Sales, Purchase, Inventory, Accounting, and Project. The 'Accounting' section is expanded, showing several configuration options. The 'Whatsapp Configuration' section is highlighted and contains four items, with the third item, 'Add order product details in message?', highlighted by a red box.

Accounting Dashboard Customers + 5 5 My Company (San Francisco) Mitchell Admin

Settings Search...

SAVE DISCARD Unsaved changes

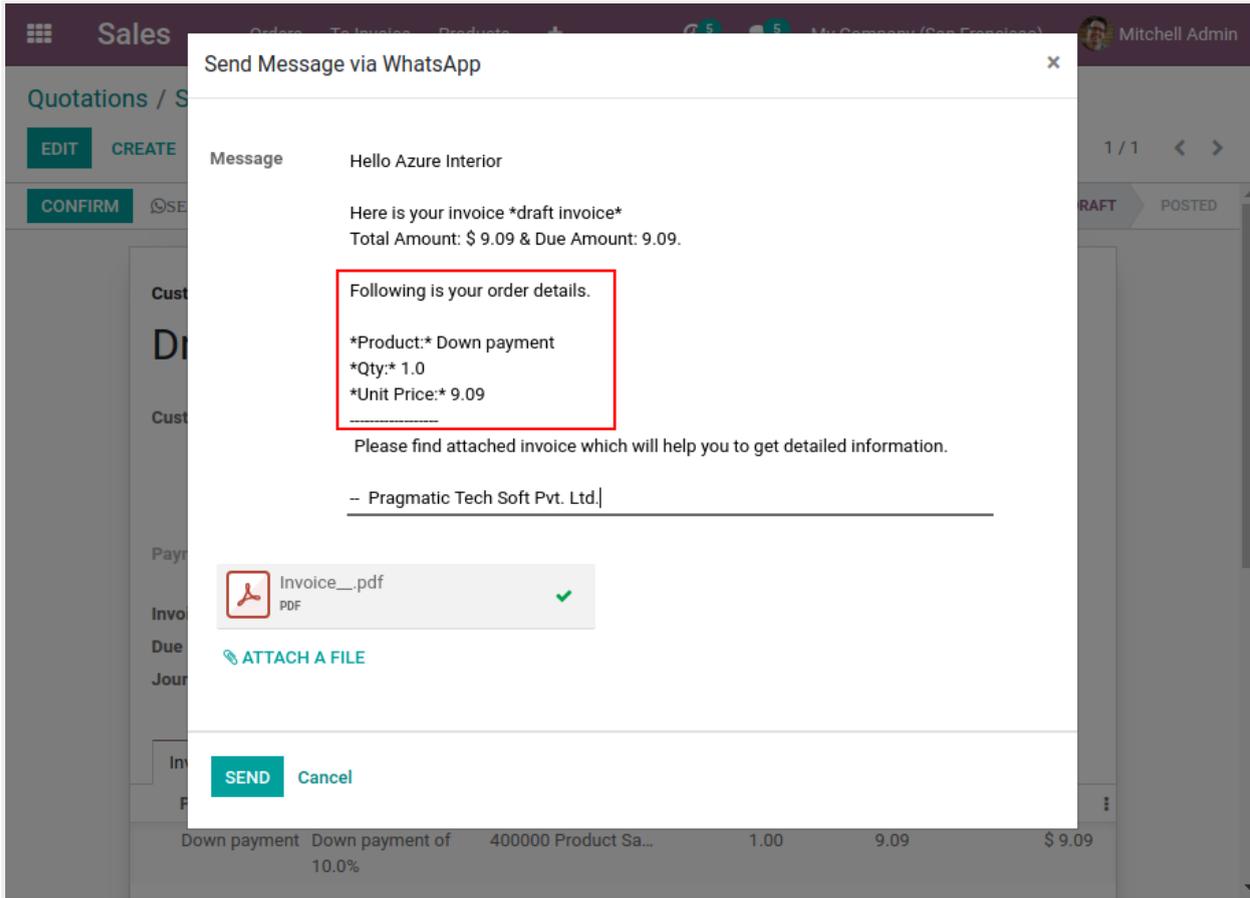
- EU Digital Goods VAT**
Apply right VAT rates for digital products sold in EU
- Cash Basis** 📄
Allow to configure taxes using cash basis
- Fiscal Country** 📄
Only the tax reports associated to this country will be available
United States

Whatsapp Configuration

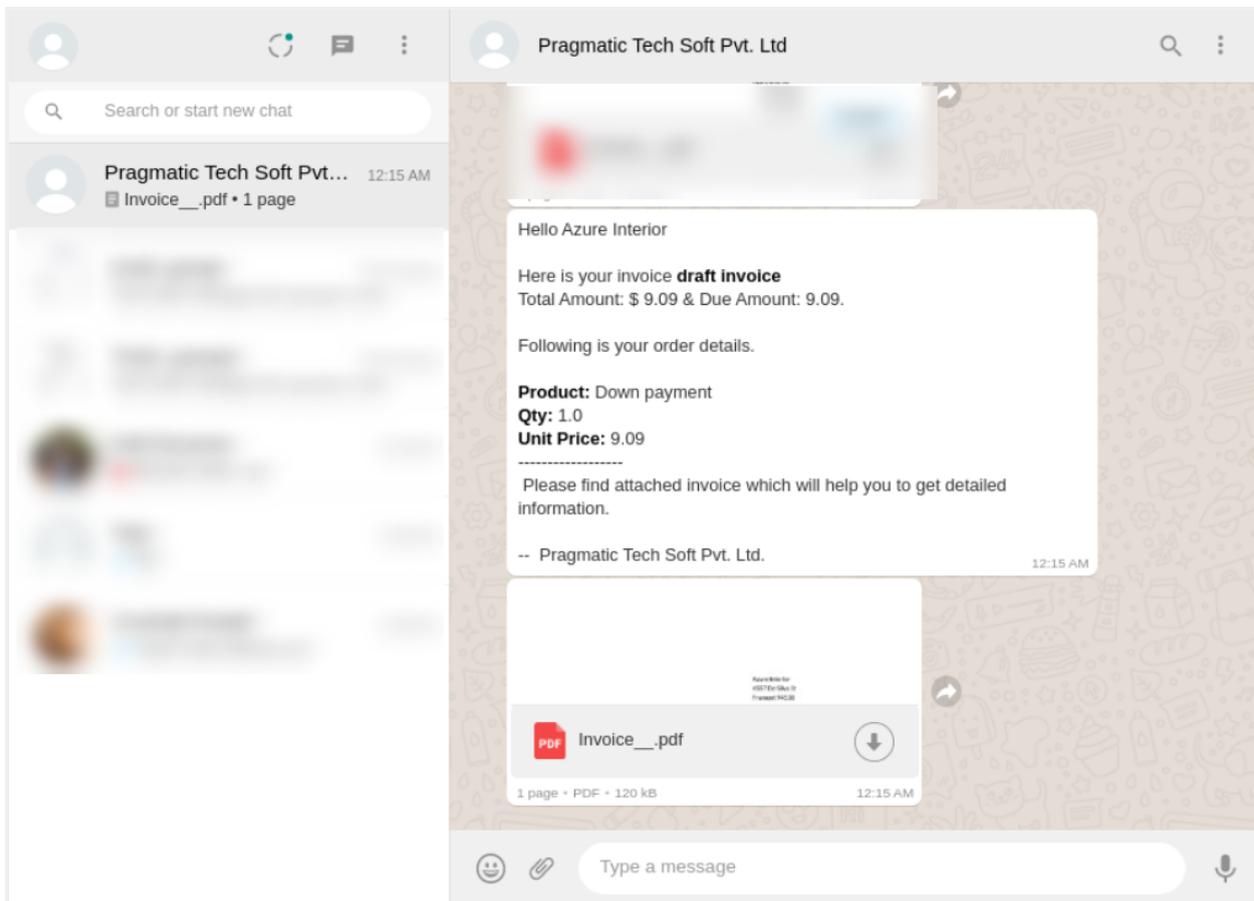
- Add Signature?**
Show Signature
- Add in chatter message?**
Display Message in chatter
- Add order product details in message?**
Display order product details in message
- Add order information in message?**
Display order information in message

Product Order details added to message.

Click on send. Message is sent to the customer's mobile.

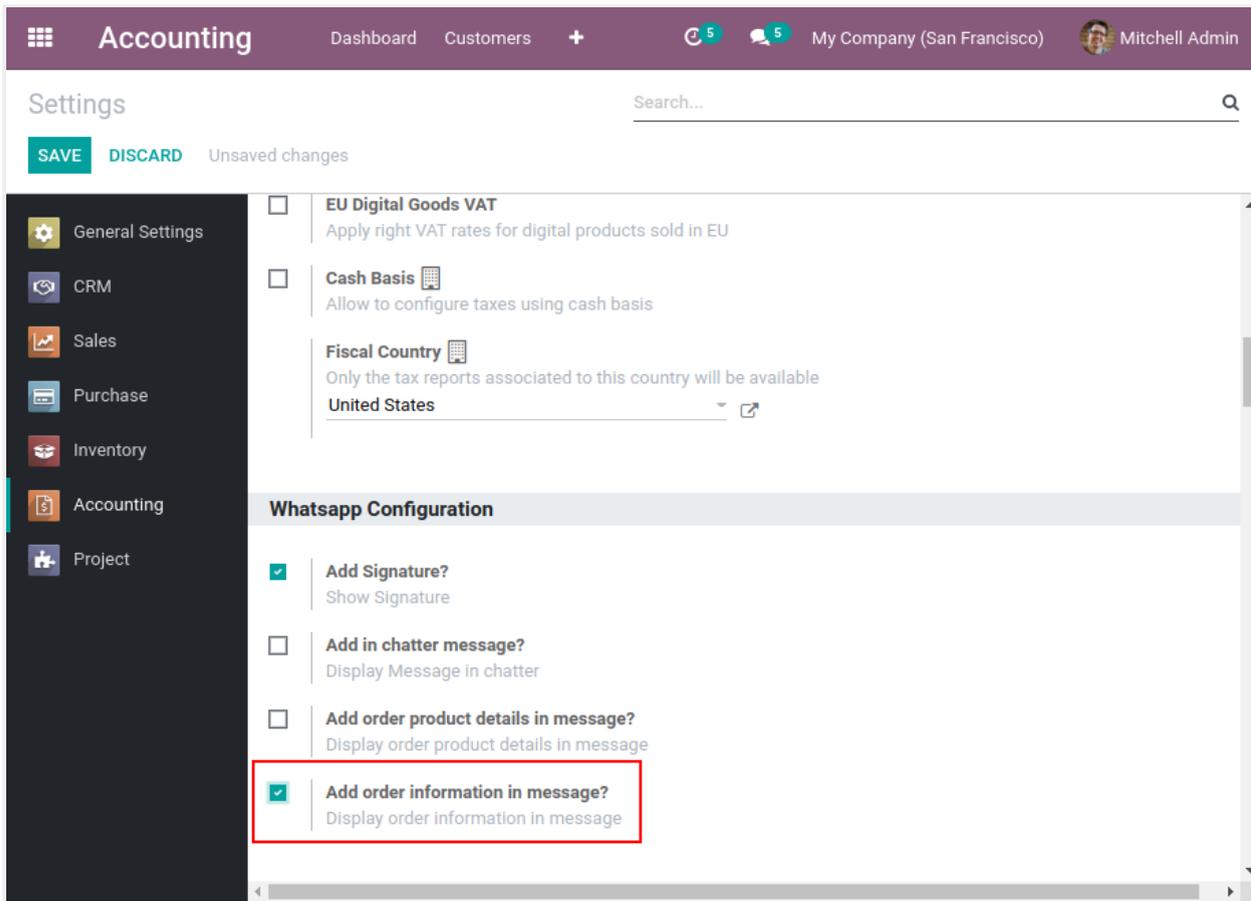


Message In whatsapp application(screenshot) from account invoice by adding invoice product details.



d) Add Order information in the message:

If the Add order information is enabled then the invoice number, invoice total amount is added to the whatsapp message.



The screenshot shows the 'Accounting' settings interface. The top navigation bar includes 'Accounting', 'Dashboard', 'Customers', '+', notification icons for '5' and '5', and the user profile 'My Company (San Francisco) Mitchell Admin'. The main content area is titled 'Settings' and includes a search bar and 'SAVE' and 'DISCARD' buttons. A sidebar on the left lists various settings categories: General Settings, CRM, Sales, Purchase, Inventory, Accounting, and Project. The 'Accounting' section is active, displaying several configuration options: 'EU Digital Goods VAT' (unchecked), 'Cash Basis' (unchecked), and 'Fiscal Country' (set to 'United States'). Below these is the 'Whatsapp Configuration' section, which contains four options: 'Add Signature?' (checked), 'Add in chatter message?' (unchecked), 'Add order product details in message?' (unchecked), and 'Add order information in message?' (checked). The 'Add order information in message?' option is highlighted with a red rectangular box.

Accounting Dashboard Customers + 5 5 My Company (San Francisco) Mitchell Admin

Settings Search...

SAVE DISCARD Unsaved changes

- EU Digital Goods VAT**
Apply right VAT rates for digital products sold in EU
- Cash Basis** 📄
Allow to configure taxes using cash basis
- Fiscal Country** 📄
Only the tax reports associated to this country will be available
United States ▾ 📄

Whatsapp Configuration

- Add Signature?**
Show Signature
- Add in chatter message?**
Display Message in chatter
- Add order product details in message?**
Display order product details in message
- Add order information in message?**
Display order information in message

Goto account invoice form view click on Send Whatsapp message button. Order information is added to message

Click on send. Message is sent to the customer's mobile.

The screenshot shows the Odoo Sales interface with a modal window titled "Send Message via WhatsApp". The message content is as follows:

Message Hello Azure Interior

Here is your invoice *draft invoice*
Total Amount: \$ 9.09 & Due Amount: 9.09.
Please find attached invoice which will help you to get detailed information.

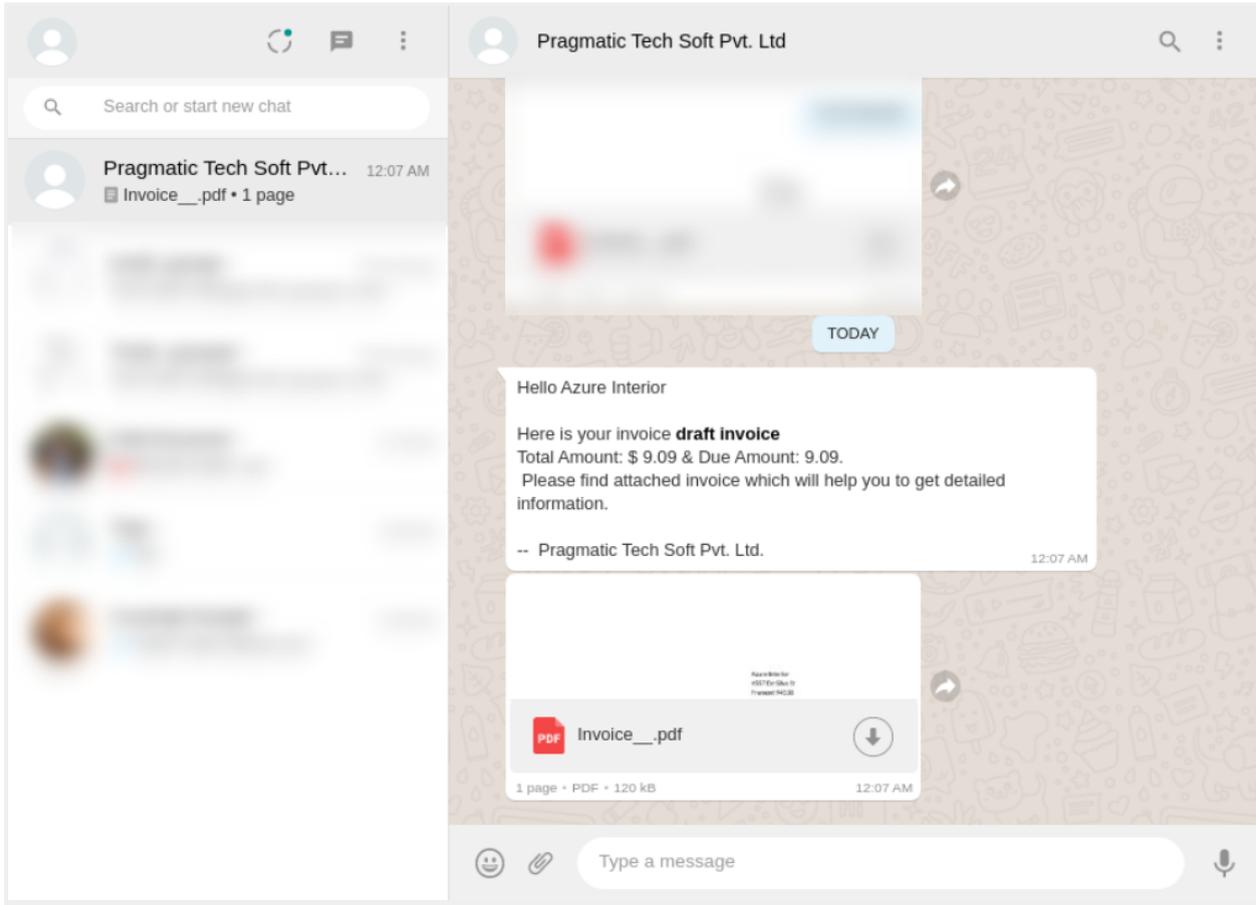
-- Pragmatic Tech Soft Pvt. Ltd.]

Below the message, there is a PDF attachment named "Invoice_.pdf" with a green checkmark. At the bottom of the dialog, there is a "SEND" button and a "Cancel" link.

The background interface shows the "Sales" header, "Quotations / S" sub-header, and a table of invoice lines. The table has columns: Product, Label, Account, Quantity, Price, Taxes, Subtotal. The visible row is:

Product	Label	Account	Quantity	Price	Taxes	Subtotal
Down payment	Down payment of 10.0%	400000 Product Sa...	1.00	9.09		\$ 9.09

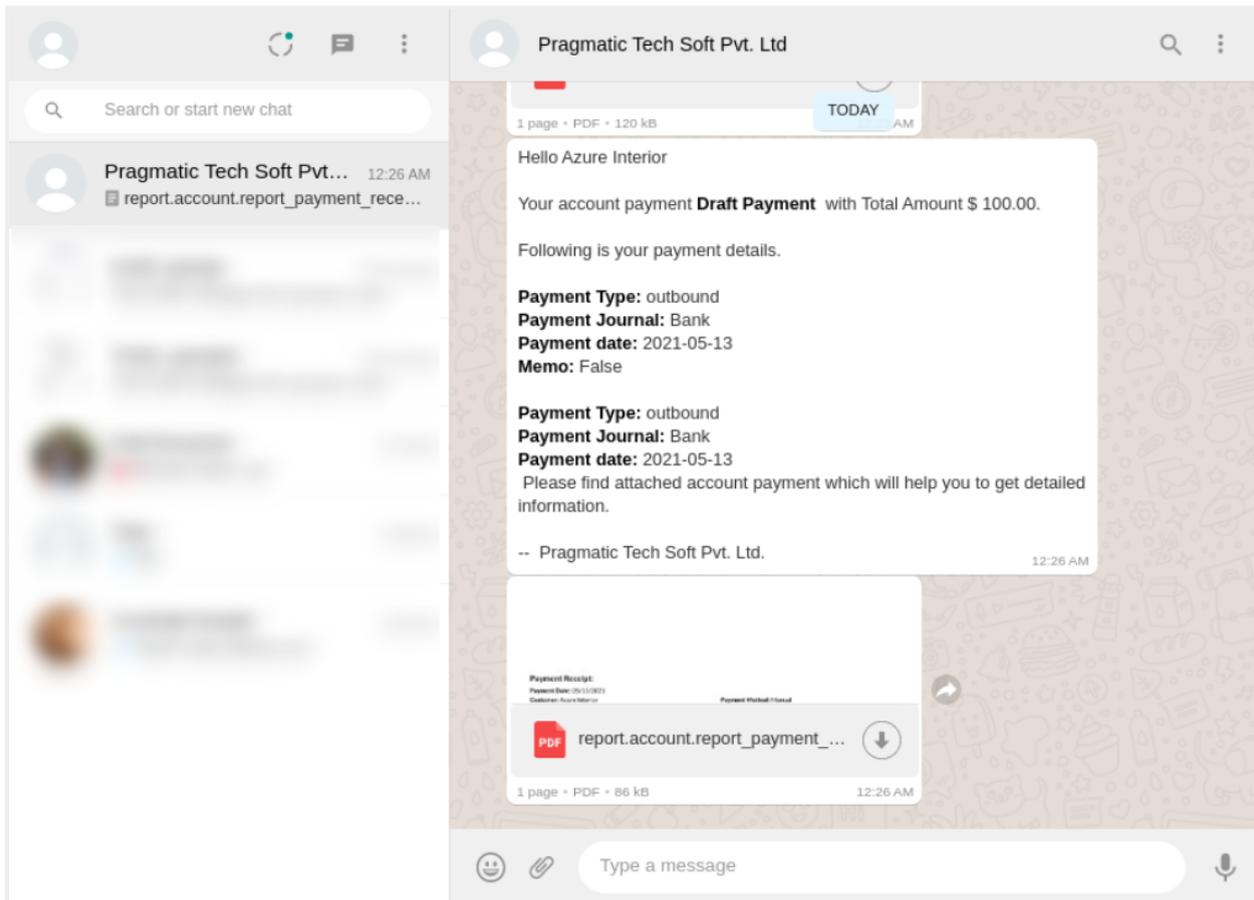
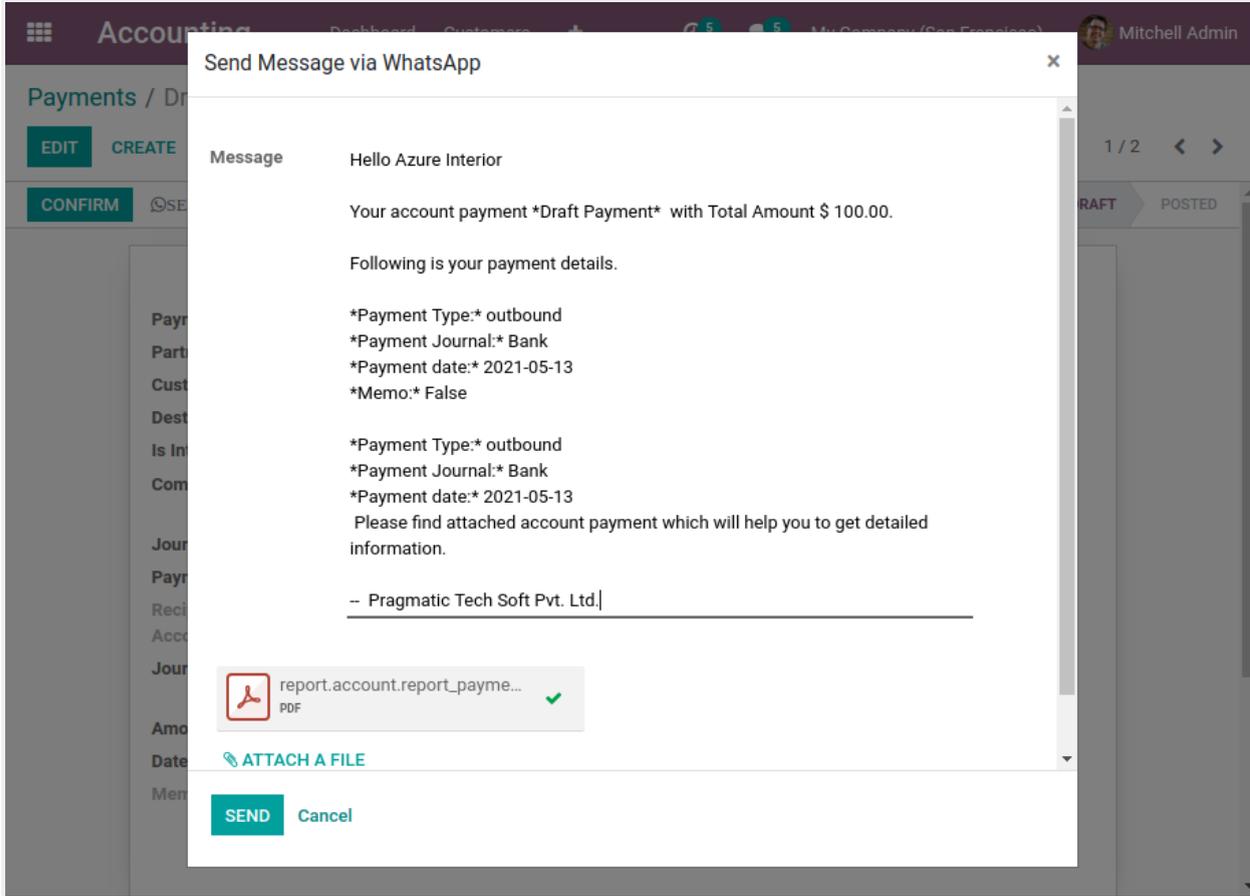
Message in whatsapp application(screenshot) from account invoice by adding order information with attachment.



8) Account Payments:

Same as the account invoice functionality that we have used for account payments.

We can send messages from payments by setting add signature, add order info in message, add product order details in message and add message in chatter.



9) Credit Notes:

Same as the account invoice functionality that we have used for credit notes.

We can send messages from credit note by setting add signature, add order info in message, add product order details in message and add message in chatter.

The screenshot shows a 'Send Message via WhatsApp' dialog box overlaid on a software interface. The dialog has a title bar with a star icon and a close button. The message content is as follows:

Message Hello Azure Interior

Here is your invoice *draft invoice*
Total Amount: \$ 862.50 & Due Amount: 862.5.

Following is your order details.

Product: Customizable Desk (CONFIG)
Qty: 1.0
Unit Price: 750.0

Please find attached invoice which will help you to get detailed information.

-- Pragmatic Tech Soft Pvt. Ltd.]

Below the message, there is a file attachment area showing a PDF icon and the filename 'Invoice_.pdf' with a green checkmark. Below this is a link that says 'ATTACH A FILE'. At the bottom of the dialog, there are two buttons: 'SEND' and 'Cancel'. The background interface shows a 'Credit Notes' section with 'EDIT' and 'CREATE' buttons, and a table with columns for product details and prices.

Product	Qty	Unit Price	Tax	Total
[DESK0005] Cu... Customizable Desk (CONFIG)	1.00	750.00	Tax 15.00%	\$ 750.00

Accounting + 5 5 My Company (San Francisco) Mitchell Admin (whatsapp_11May)

Credit Notes / Draft Credit Note (* 22)

EDIT **CREATE** Print Action 1 / 1 < >

[Send message](#) [Log note](#) [Schedule activity](#) 1 Following 1

Today

Mitchell Admin - now

Hello Azure Interior

Here is your invoice **draft invoice**
Total Amount: \$ 862.50 & Due Amount: 862.5.

Following is your order details.

Product: Customizable Desk (CONFIG)
Qty: 1.0
Unit Price: 750.0

Please find attached invoice which will help you to get detailed information.

-- Pragmatic Tech Soft Pvt. Ltd.

Invoice__pdf PDF

Mitchell Admin - a minute ago

Invoice Created

Pragmatic Tech Soft Pvt. Ltd

Search or start new chat

Pragmatic Tech Soft Pvt... 12:32 AM

Invoice__pdf • 1 page

Hello Azure Interior

Here is your invoice **draft invoice**
Total Amount: \$ 862.50 & Due Amount: 862.5.

Following is your order details.

Product: Customizable Desk (CONFIG)
Qty: 1.0
Unit Price: 750.0

Please find attached invoice which will help you to get detailed information.

-- Pragmatic Tech Soft Pvt. Ltd. 12:32 AM

Invoice__pdf

1 page • PDF • 157 kB 12:32 AM

Type a message

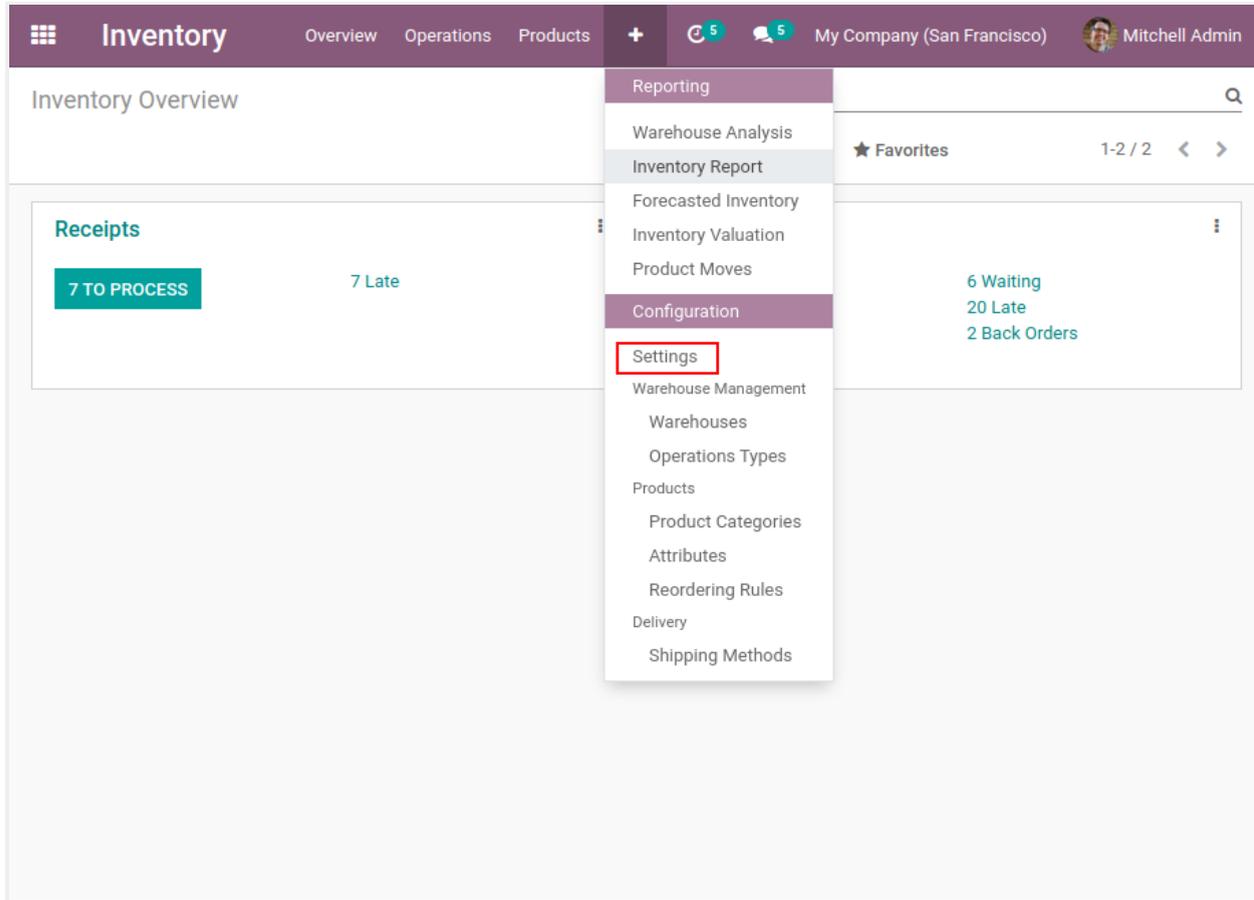
10) Delivery order:

You can send a WhatsApp message to a customer's mobile number by clicking send WhatsApp message from the Delivery Order form view.

Configuration:

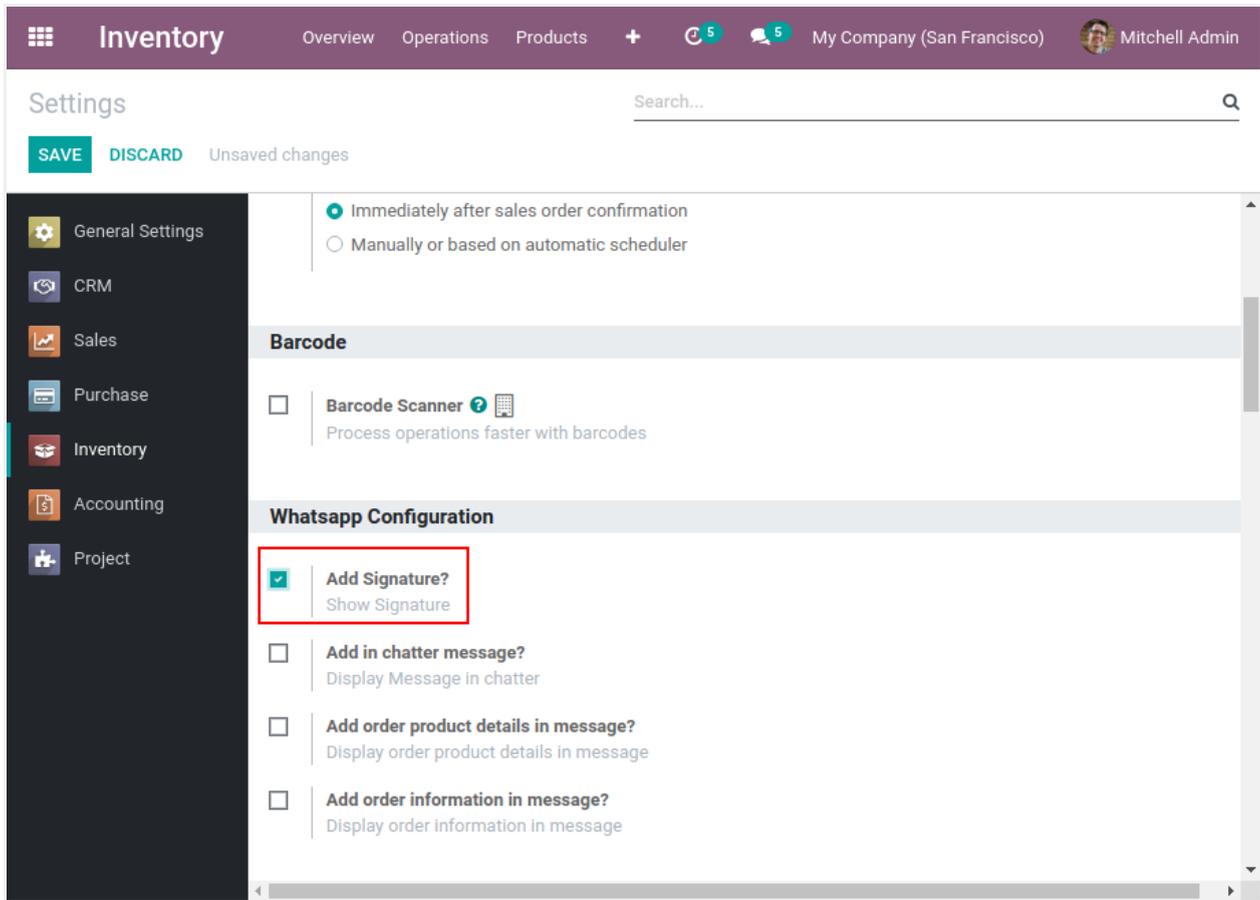
You can send a whatsapp message by configuring Add signature, Add order information, Add product details, Add message in chatter.

Goto Inventory -> Configuration -> Settings



The screenshot displays the 'Inventory' application interface. The top navigation bar includes 'Inventory', 'Overview', 'Operations', and 'Products'. A user profile for 'Mitchell Admin' is visible in the top right. A central menu is open, showing options under 'Reporting' (Warehouse Analysis, Inventory Report, Forecasted Inventory, Inventory Valuation, Product Moves) and 'Configuration' (Warehouse Management, Warehouses, Operations Types, Products, Product Categories, Attributes, Reordering Rules, Delivery, Shipping Methods). The 'Settings' option under Configuration is highlighted with a red box. The main content area shows 'Inventory Overview' with a 'Receipts' section containing '7 TO PROCESS' and '7 Late'. A 'Favorites' section on the right shows '6 Waiting', '20 Late', and '2 Back Orders'.

a) Add signature:



The screenshot displays the 'Inventory' settings page in Odoo. The top navigation bar includes 'Overview', 'Operations', 'Products', and a user profile for 'My Company (San Francisco)' with the name 'Mitchell Admin'. The main content area is titled 'Settings' and features a search bar and buttons for 'SAVE' and 'DISCARD' with the text 'Unsaved changes'.

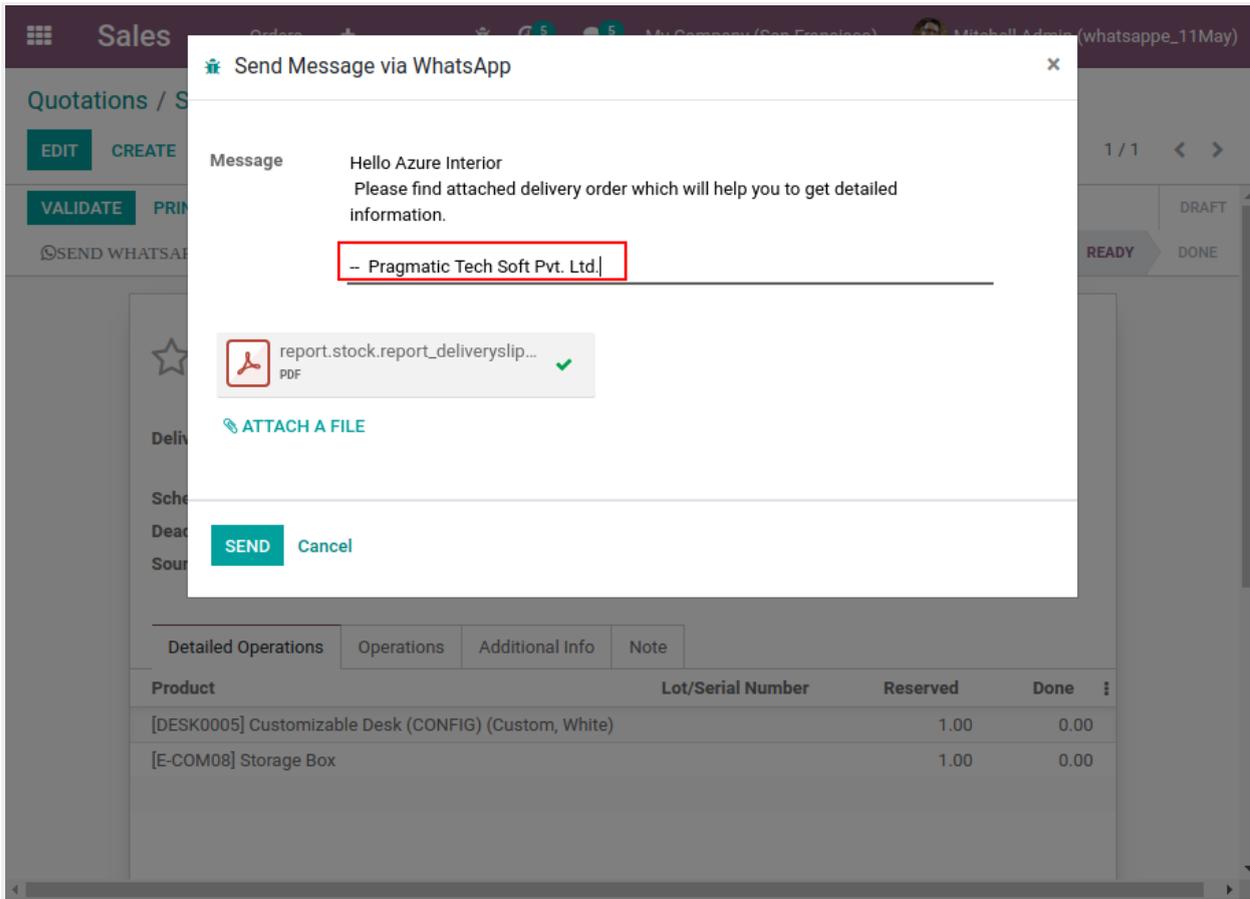
The left sidebar lists various modules: General Settings, CRM, Sales, Purchase, Inventory (highlighted), Accounting, and Project.

The main settings area is divided into sections:

- General Settings:** Includes radio buttons for 'Immediately after sales order confirmation' (selected) and 'Manually or based on automatic scheduler'.
- Barcode:** Includes a checkbox for 'Barcode Scanner' (unchecked) with the description 'Process operations faster with barcodes'.
- Whatsapp Configuration:** Includes several checkboxes:
 - Add Signature?** (checked) with the subtext 'Show Signature'. This option is highlighted with a red box.
 - Add in chatter message?** (unchecked) with the subtext 'Display Message in chatter'.
 - Add order product details in message?** (unchecked) with the subtext 'Display order product details in message'.
 - Add order information in message?** (unchecked) with the subtext 'Display order information in message'.

Go to the delivery order form, click on the Send WhatsApp message button, the wizard will open. The signature is added to the message.

Click the **Send** button and the message will be sent to the customer's mobile.



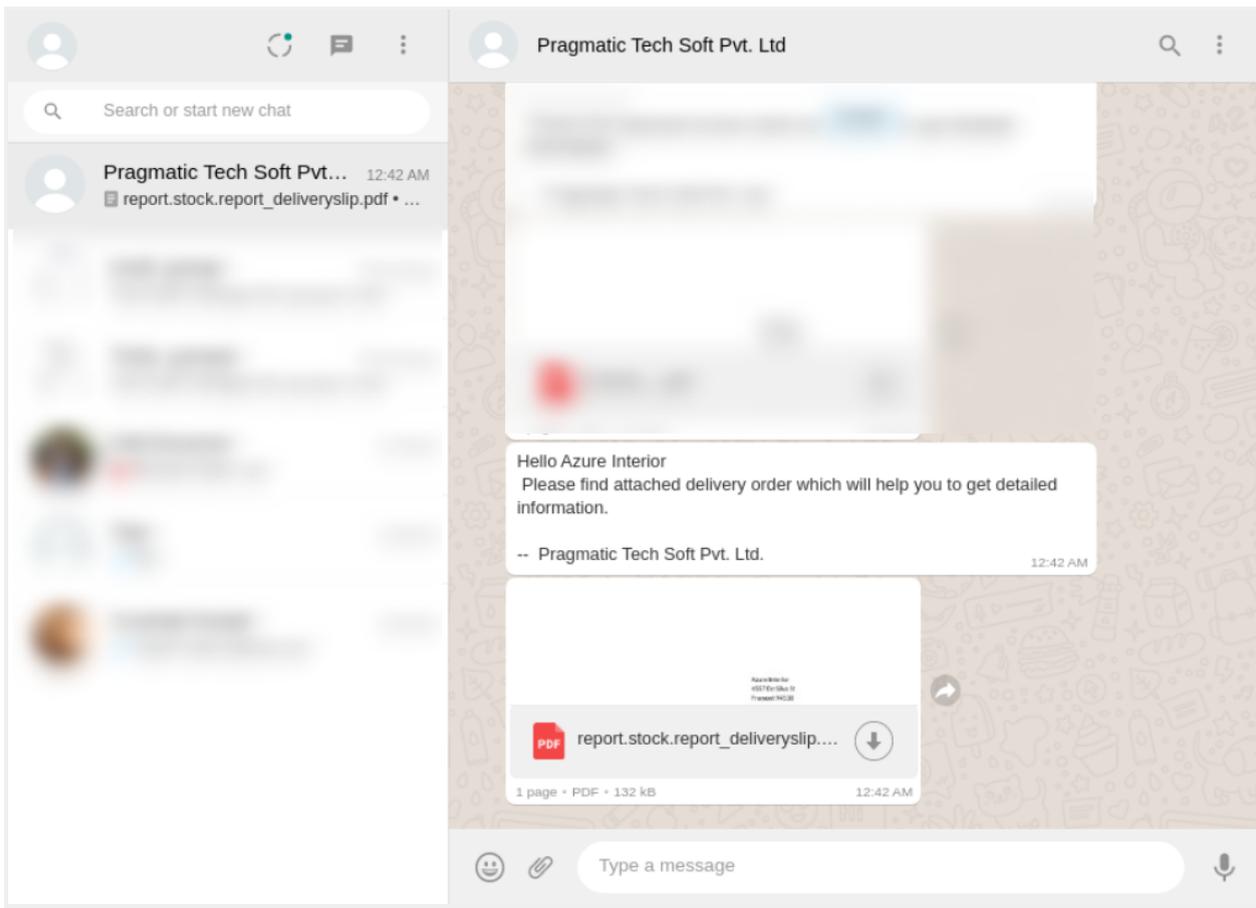
The screenshot shows a 'Send Message via WhatsApp' dialog box overlaid on a CRM interface. The dialog contains the following elements:

- Title:** Send Message via WhatsApp
- Message:** Hello Azure Interior
Please find attached delivery order which will help you to get detailed information.
- Signature:** -- Pragmatic Tech Soft Pvt. Ltd. (highlighted with a red box)
- Attachment:** report.stock.report_deliveryslip... PDF (with a green checkmark)
- Action:** ATTACH A FILE (link)
- Buttons:** SEND (green), Cancel (grey)

The background CRM interface shows a 'Sales' header, a 'Quotations / S...' section with buttons for EDIT, CREATE, VALIDATE, and PRINT, and a 'SEND WHATSA...' button. Below the dialog, a table is visible with columns: Product, Lot/Serial Number, Reserved, and Done.

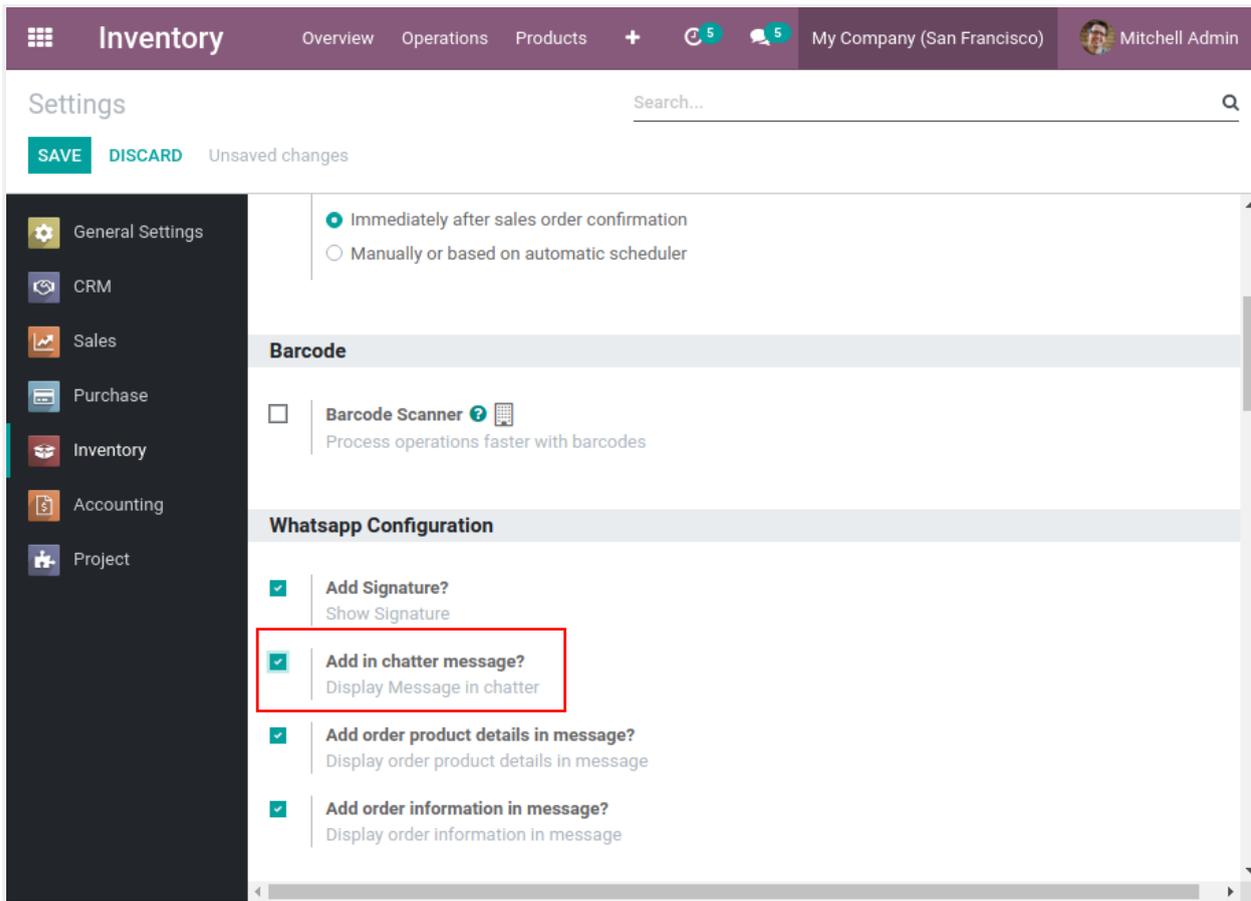
Product	Lot/Serial Number	Reserved	Done
[DESK0005] Customizable Desk (CONFIG) (Custom, White)		1.00	0.00
[E-COM08] Storage Box		1.00	0.00

Message sent in whatsapp app (screenshot) of Delivery Order by adding signature with attachment.



b) **Add to chatter message:**

If **Add in chatter message** is enabled, WhatsApp message will be added to chat with proper formatting and attachment.



Whatsapp message sent successfully and will be tracked in message chatter with attachment

Sales Orders To Invoice Products Reporting Configuration Administrator

Transfers / WH/OUT/00001

EDIT CREATE Print Action 1 / 1 < >

Send message Log note Schedule activity 3 Following 2

Today

Administrator - now
Hello Administrator

Here is your Delivery order **WH/OUT/00001** (with reference: S00001)

Following is your delivery order details.

Product: product1
Qty: 1.0 Units

Product: product2
Qty: 1.0 Units

Please find attached delivery order which will help you to get detailed information.

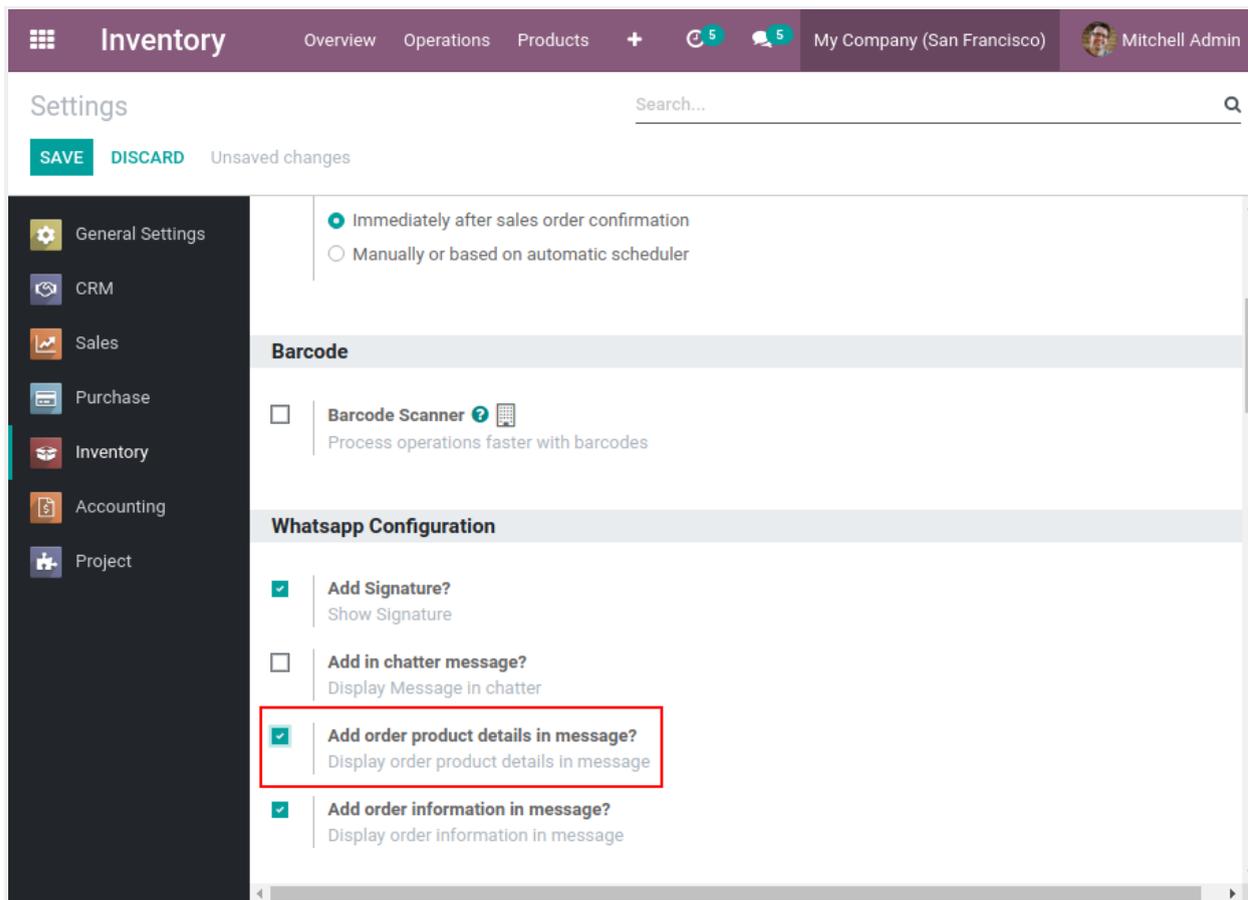
-- Pragmatic Tech Soft Pvt. Ltd.

report_delivery REPORT_DELIVERY

Yesterday

c) Order product details in message

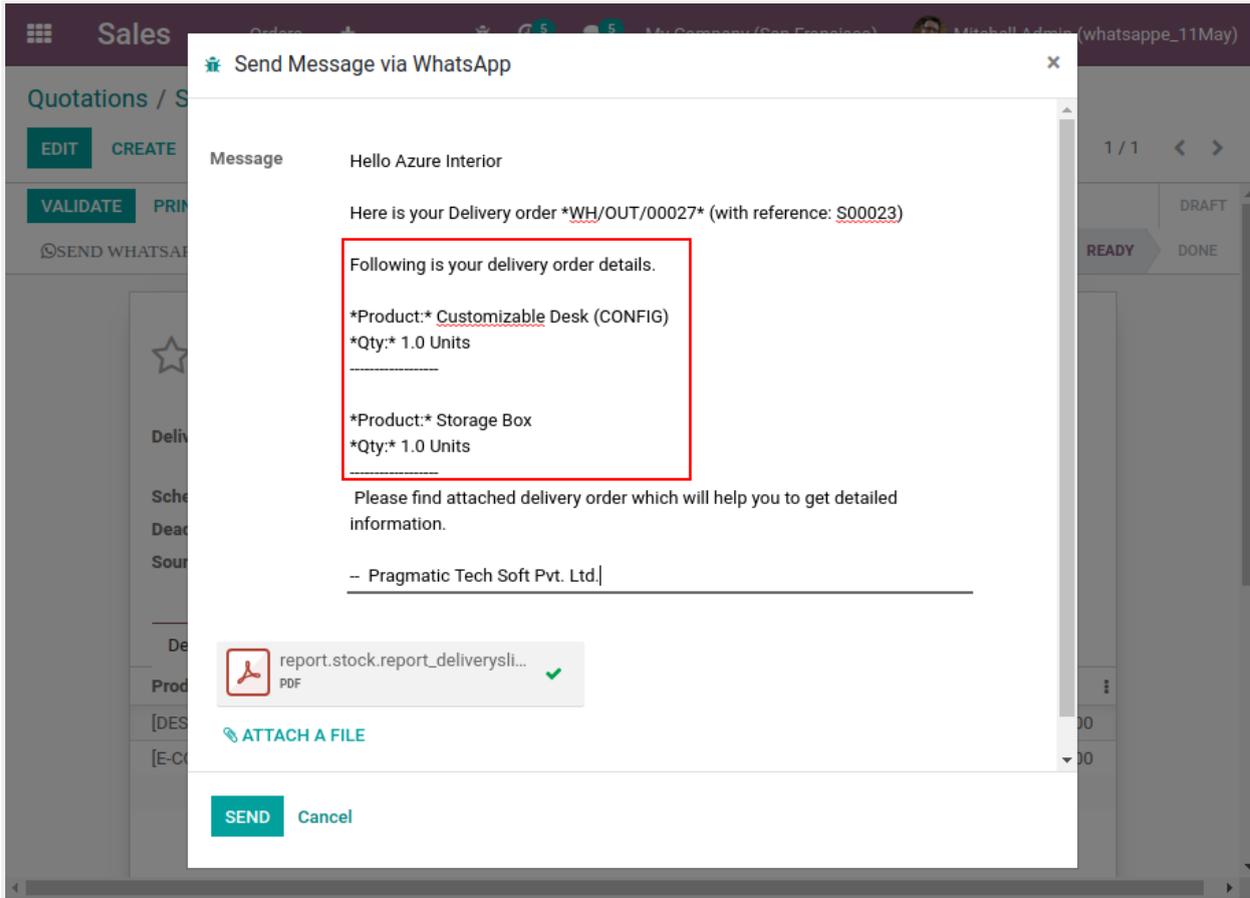
If order product details are enabled then the product name, unit price, quantity and subtotal is added in the whatsapp message.



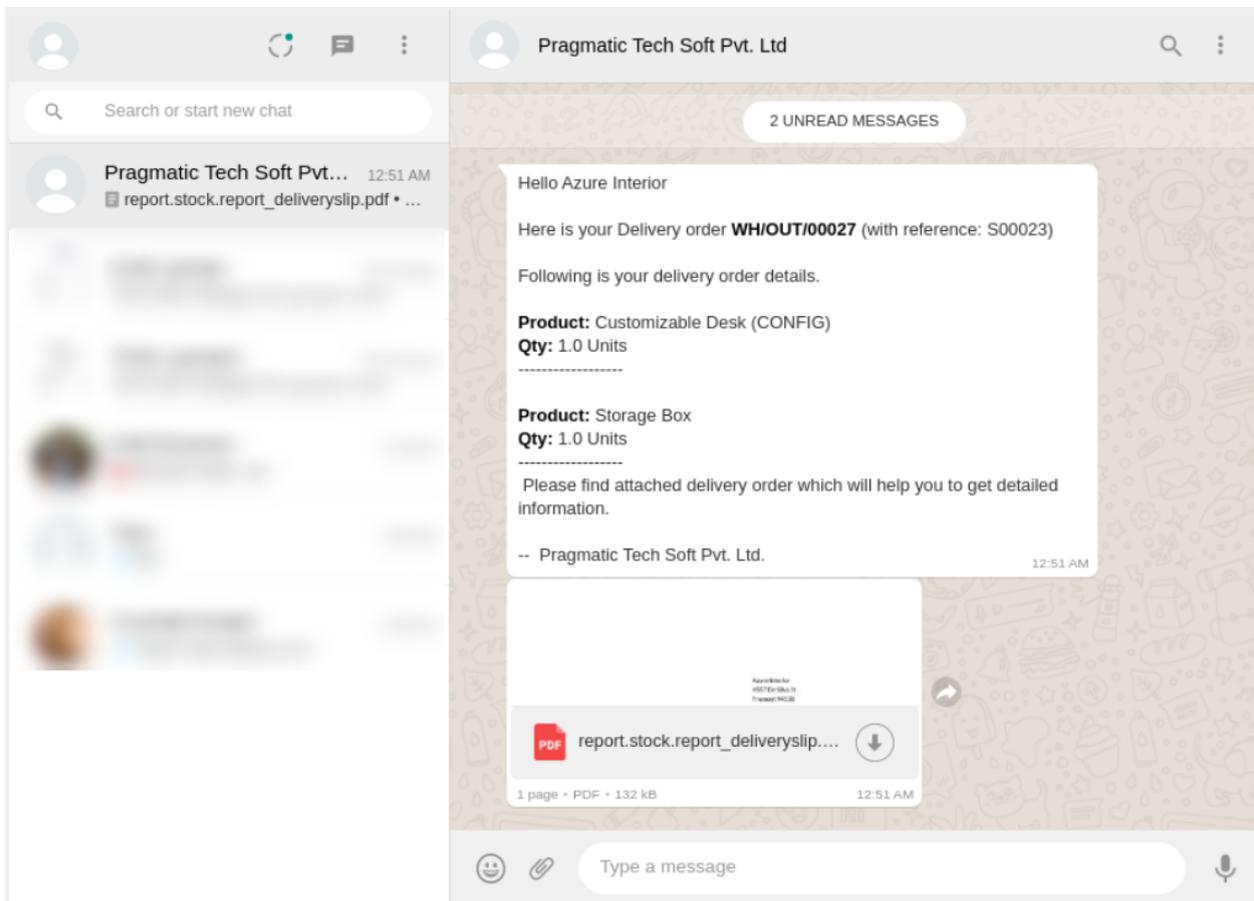
The screenshot displays the Odoo Inventory settings interface. At the top, there is a navigation bar with 'Inventory' as the active module, and tabs for 'Overview', 'Operations', and 'Products'. The user is identified as 'My Company (San Francisco)' and 'Mitchell Admin'. Below the navigation bar, the 'Settings' page is shown with a search bar and buttons for 'SAVE' and 'DISCARD' next to the text 'Unsaved changes'. A left sidebar lists various modules: General Settings, CRM, Sales, Purchase, Inventory (highlighted), Accounting, and Project. The main content area is divided into sections: 'Barcode' and 'Whatsapp Configuration'. In the 'Barcode' section, there is an option for 'Barcode Scanner' which is currently unchecked. The 'Whatsapp Configuration' section contains three options, all of which are checked: 'Add Signature?' (Show Signature), 'Add in chatter message?' (Display Message in chatter), and 'Add order product details in message?' (Display order product details in message). The third option is highlighted with a red rectangular box. The fourth option, 'Add order information in message?' (Display order information in message), is also checked.

Product Order details added to message.

Click on send. Message is sent to the customer's mobile.

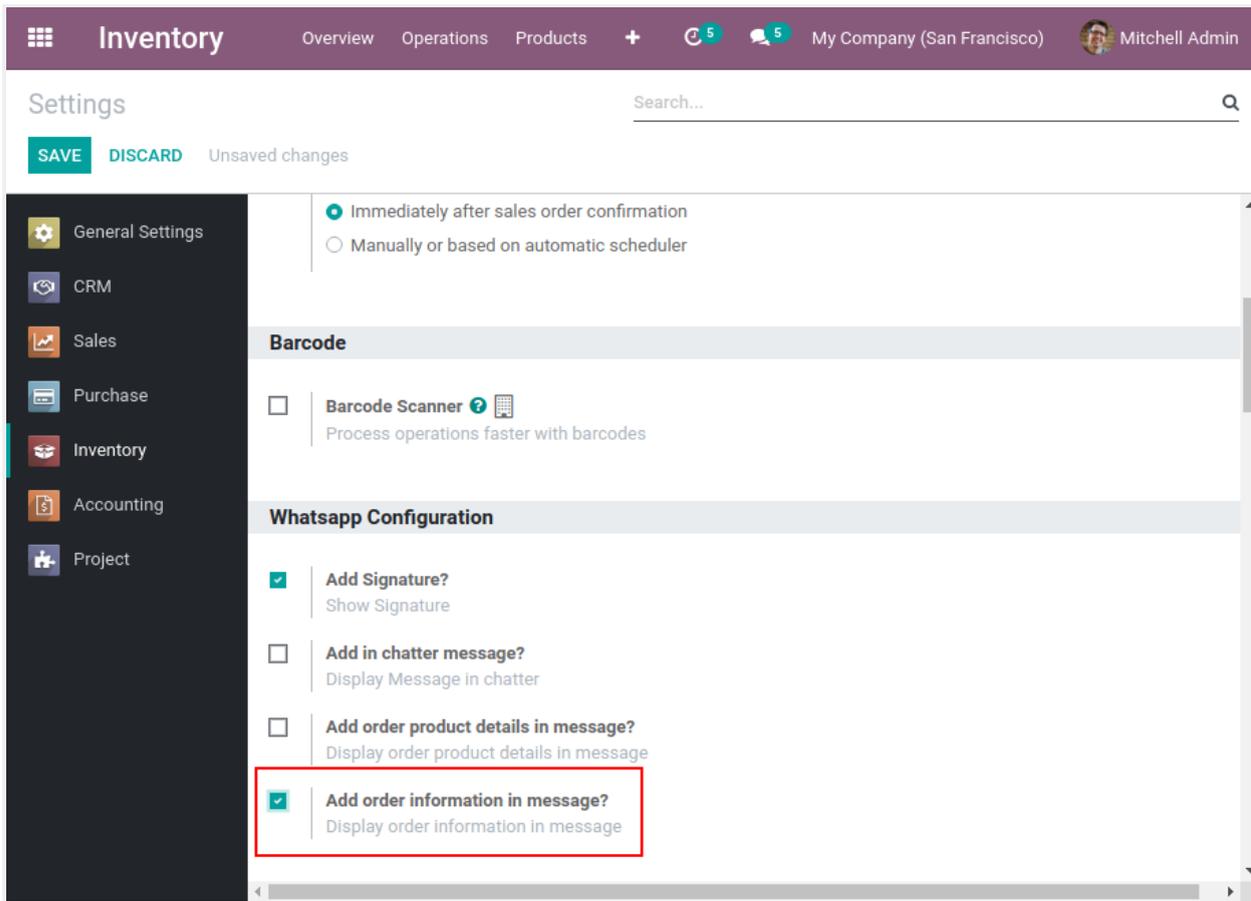


Message In whatsapp application(screenshot) from delivery order by adding order product details.



d) Add order information in the message:

If the Add order information is enabled then the order number, order total amount is added to the whatsapp message.



The screenshot displays the 'Inventory' settings page in Odoo. The left sidebar contains navigation options: General Settings, CRM, Sales, Purchase, Inventory, Accounting, and Project. The main content area is titled 'Settings' and includes a search bar and a 'SAVE' button. Below the 'SAVE' button, there are two radio button options: 'Immediately after sales order confirmation' (selected) and 'Manually or based on automatic scheduler'. The 'Barcode' section has a 'Barcode Scanner' checkbox which is unchecked. The 'Whatsapp Configuration' section contains four checkboxes: 'Add Signature?' (checked), 'Add in chatter message?' (unchecked), 'Add order product details in message?' (unchecked), and 'Add order information in message?' (checked). The 'Add order information in message?' option is highlighted with a red rectangular box.

Inventory Overview Operations Products + 5 5 My Company (San Francisco) Mitchell Admin

Settings Search...

SAVE DISCARD Unsaved changes

Immediately after sales order confirmation
 Manually or based on automatic scheduler

Barcode

Barcode Scanner ? 
Process operations faster with barcodes

Whatsapp Configuration

Add Signature?
Show Signature

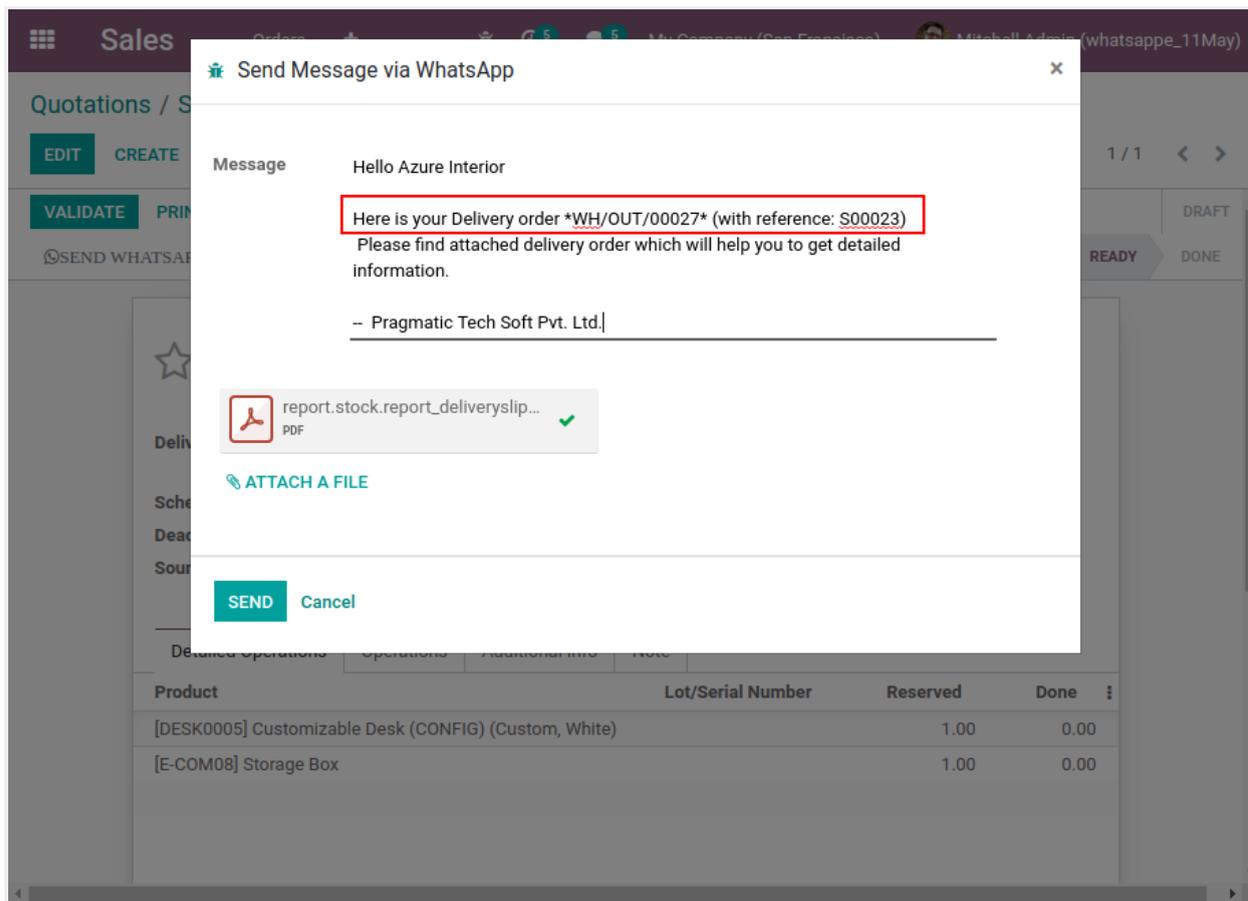
Add in chatter message?
Display Message in chatter

Add order product details in message?
Display order product details in message

Add order information in message?
Display order information in message

Goto delivery order form view click on Send Whatsapp message button. Order information is added to message

Click on send. Message is sent to the customer's mobile.



Send Message via WhatsApp

Message Hello Azure Interior

Here is your Delivery order *WH/OUT/00027* (with reference: S00023)
Please find attached delivery order which will help you to get detailed information.

-- Pragmatic Tech Soft Pvt. Ltd.]

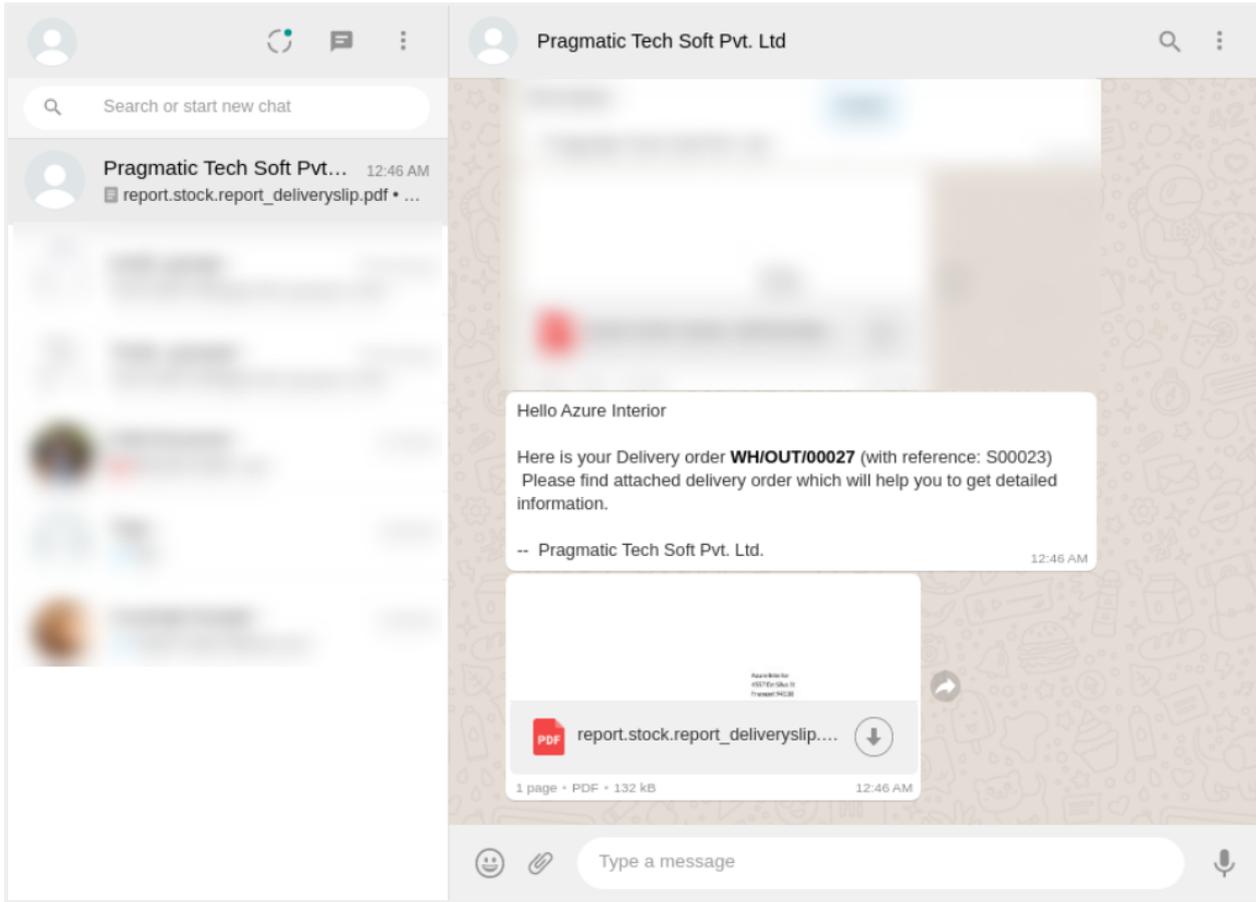
report.stock.report_deliveryslip... PDF

ATTACH A FILE

SEND Cancel

Product	Lot/Serial Number	Reserved	Done
[DESK0005] Customizable Desk (CONFIG) (Custom, White)		1.00	0.00
[E-COM08] Storage Box		1.00	0.00

Message in whatsapp application(screenshot) from delivery order by adding order information with attachment.



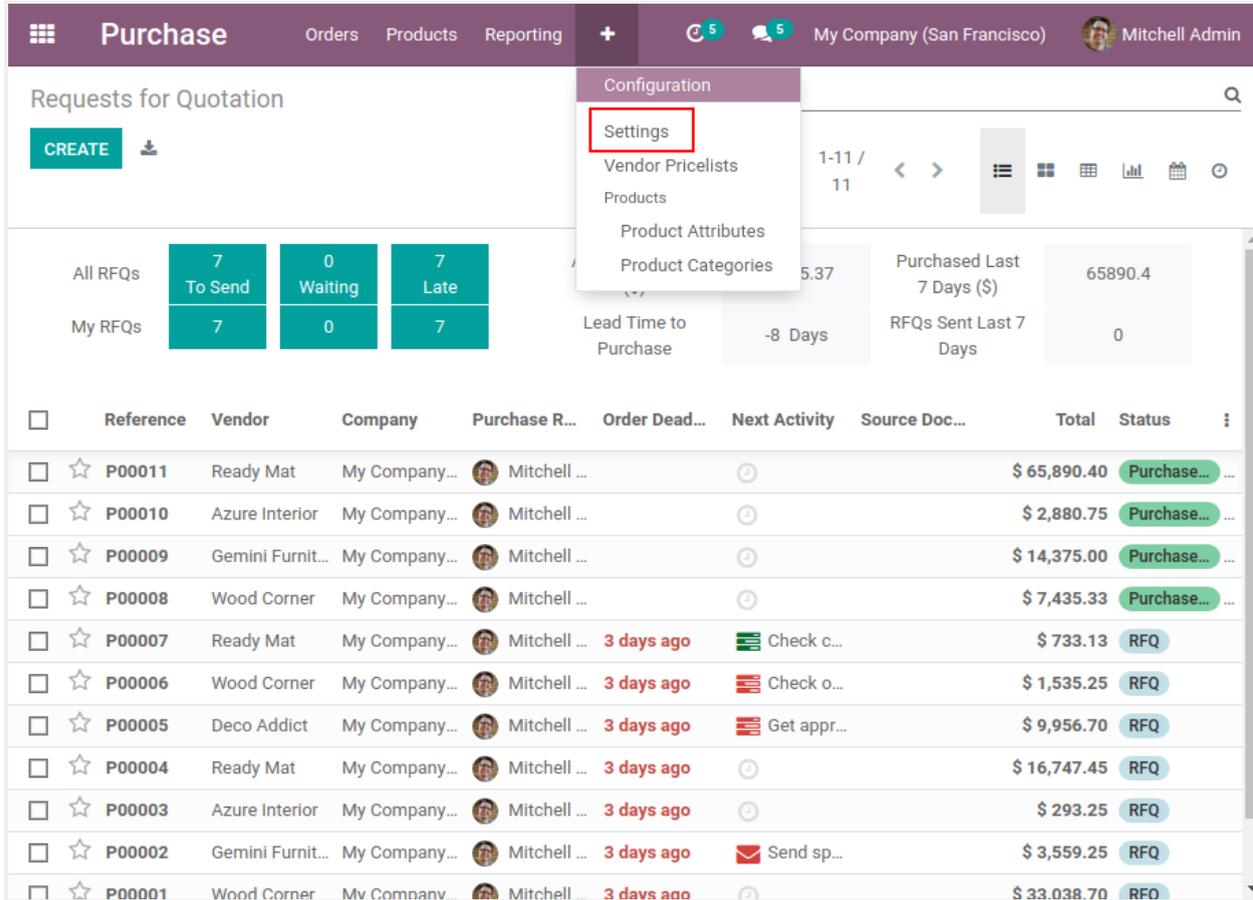
11) Purchase order:

You can send a WhatsApp message to a customer's mobile number by clicking send WhatsApp message from the Purchase Order form view.

Configuration:

You can send a whatsapp message by configuring Add signature, Add order information, Add product details, Add message in chatter.

Goto Purchase -> Configuration -> Settings



The screenshot displays the 'Purchase' module interface. At the top, there is a navigation bar with 'Purchase' as the main title and sub-menus for 'Orders', 'Products', and 'Reporting'. A user profile for 'Mitchell Admin' is visible in the top right. Below the navigation bar, the main content area is titled 'Requests for Quotation' and features a 'CREATE' button. A 'Configuration' dropdown menu is open, with 'Settings' highlighted. The menu options include 'Settings', 'Vendor Pricelists', 'Products', 'Product Attributes', and 'Product Categories'. Below the configuration menu, there are summary statistics for 'All RFQs' and 'My RFQs' across three categories: 'To Send', 'Waiting', and 'Late'. A table below these statistics shows a list of RFQs with columns for Reference, Vendor, Company, Purchase R..., Order Dead..., Next Activity, Source Doc..., Total, and Status. The table contains 11 rows of data, each representing a different RFQ with its respective details and status.

Reference	Vendor	Company	Purchase R...	Order Dead...	Next Activity	Source Doc...	Total	Status
P00011	Ready Mat	My Company...	Mitchell ...				\$ 65,890.40	Purchase...
P00010	Azure Interior	My Company...	Mitchell ...				\$ 2,880.75	Purchase...
P00009	Gemini Furnit...	My Company...	Mitchell ...				\$ 14,375.00	Purchase...
P00008	Wood Corner	My Company...	Mitchell ...				\$ 7,435.33	Purchase...
P00007	Ready Mat	My Company...	Mitchell ...	3 days ago	Check c...		\$ 733.13	RFQ
P00006	Wood Corner	My Company...	Mitchell ...	3 days ago	Check o...		\$ 1,535.25	RFQ
P00005	Deco Addict	My Company...	Mitchell ...	3 days ago	Get appr...		\$ 9,956.70	RFQ
P00004	Ready Mat	My Company...	Mitchell ...	3 days ago			\$ 16,747.45	RFQ
P00003	Azure Interior	My Company...	Mitchell ...	3 days ago			\$ 293.25	RFQ
P00002	Gemini Furnit...	My Company...	Mitchell ...	3 days ago	Send sp...		\$ 3,559.25	RFQ
P00001	Wood Corner	My Company...	Mitchell ...	3 days ago			\$ 33,038.70	RFQ

a) Add Signature:

The screenshot displays the Odoo Purchase settings interface. At the top, the navigation bar includes 'Purchase', 'Orders', 'Products', 'Reporting', and a user profile for 'Mitchell Admin'. Below the navigation bar, the 'Settings' page is shown with a search bar and buttons for 'SAVE' and 'DISCARD'. A sidebar on the left lists various modules: General Settings, CRM, Sales, Purchase (highlighted), Inventory, Accounting, and Project. The main content area is divided into sections: 'Bill Control' with options for 'Ordered quantities' and 'Received quantities', and '3-way matching: purchases, receptions and bills'. The 'Whatsapp Configuration' section is highlighted in grey and contains four settings: 'Add Signature?' (checked), 'Add in chatter message?', 'Add Order product details in message?', and 'Add Order information in message?'. The 'Add Signature?' option is highlighted with a red rectangular box.

Purchase Orders Products Reporting + 5 5 My Company (San Francisco) Mitchell Admin

Settings Search... Q

SAVE **DISCARD** Unsaved changes

- General Settings
- CRM
- Sales
- Purchase**
- Inventory
- Accounting
- Project

Bill Control ⓘ
Quantities billed by vendors

- Ordered quantities
- Received quantities

3-way matching: purchases, receptions and bills ⓘ
Make sure you only pay bills for which you received the goods you ordered

Whatsapp Configuration

- Add Signature?**
Show Signature
- Add in chatter message?**
Display Message in chatter
- Add Order product details in message?**
Display order product details in message
- Add Order information in message?**
Display order information in message

Go to the purchase order form, click on the Send WhatsApp message button, the wizard will open. The signature is added to the message.

Click the **Send** button and the message will be sent to the customer's mobile.

The screenshot shows a 'Send Message via WhatsApp' dialog box overlaid on a purchase order form. The dialog contains the following text:

Message Hello Azure Interior
Please find attached purchase order which will help you to get detailed information.

-- Pragmatic Tech Soft Pvt. Ltd.

report.purchase.report_purcha... PDF

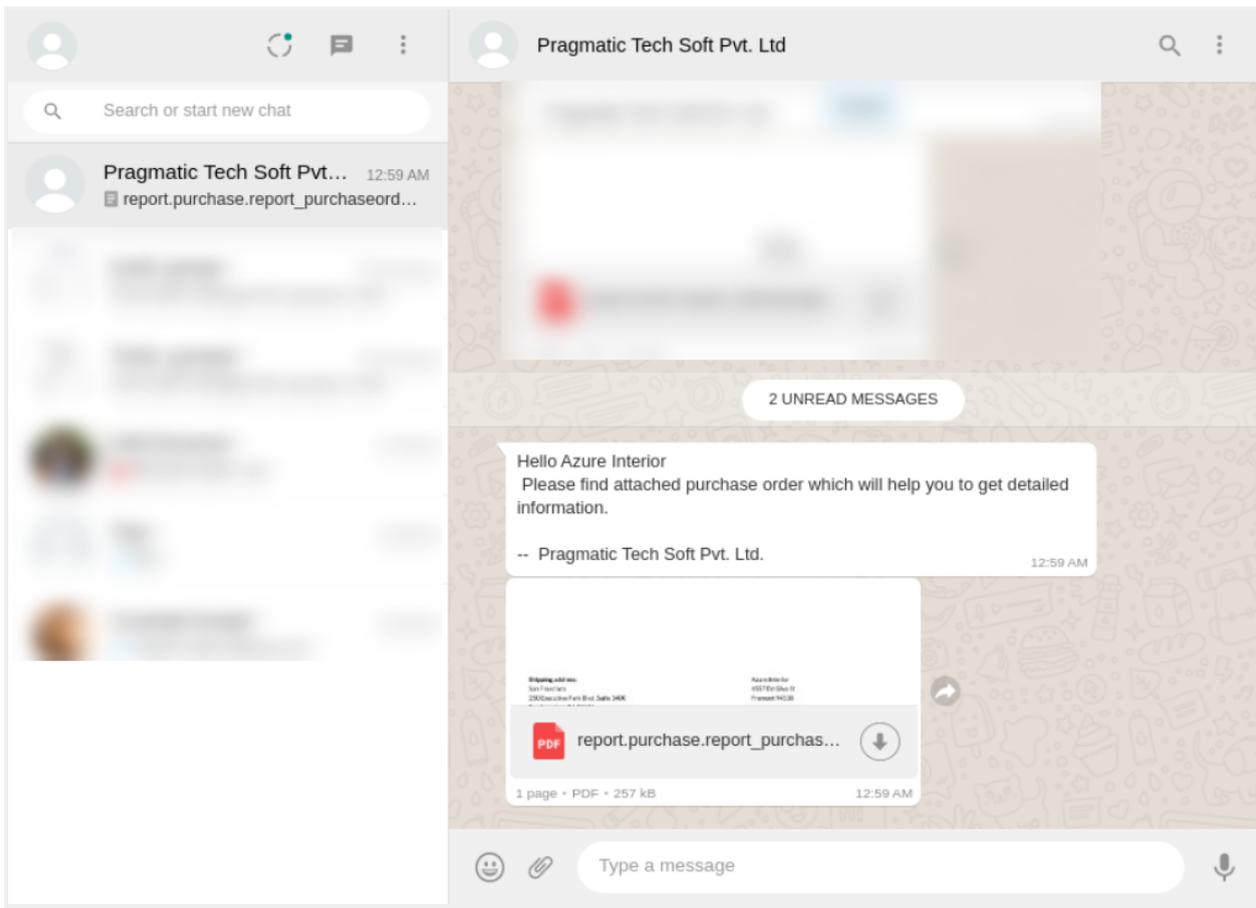
ATTACH A FILE

SEND Cancel

Confirmation Date 04/23/2021 11:49:26
Receipt Date 05/11/2021 05:30:00
 Ask confirmation 1 day(s) before

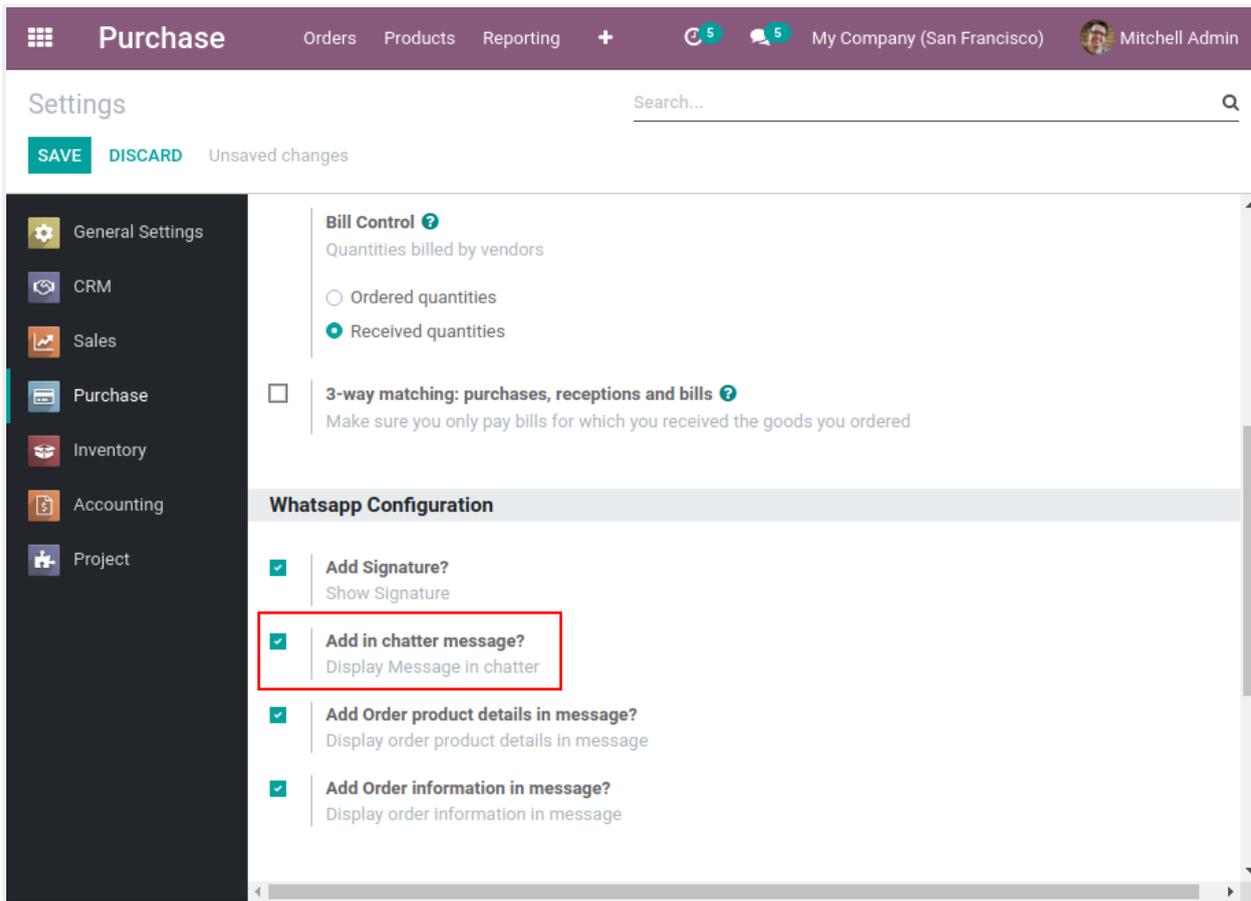
Product	Description	Quantity	Received	Billed	Unit Price	Taxes	Subto
[FURN_0269]...	Office Chair Black	10.00	0.00	0.00	250.50	Tax 15.00%	\$ 2,50

Message sent in whatsapp app (screenshot) of Purchase Order by adding signature with attachment.



b) **Add to chatter message:**

If **Add in chatter message** is enabled, WhatsApp message will be added to chat with proper formatting and attachment.



Whatsapp message sent successfully and will be tracked in message chatter with attachment

Purchase Orders Products Reporting Configuration Administrator

Requests for Quotation / P00001

EDIT CREATE Print Action 1 / 1

Send message Log note Schedule activity 2 Following 1

Today

Administrator - now
Hello Administrator

Here is your Purchase order **P00001**
Total Amount: \$ 0.00.

Following is your order details.

Product: product1
Qty: 1.0 Units

Product: product2
Qty: 1.0 Units

Please find attached purchase order which will help you to get detailed information.

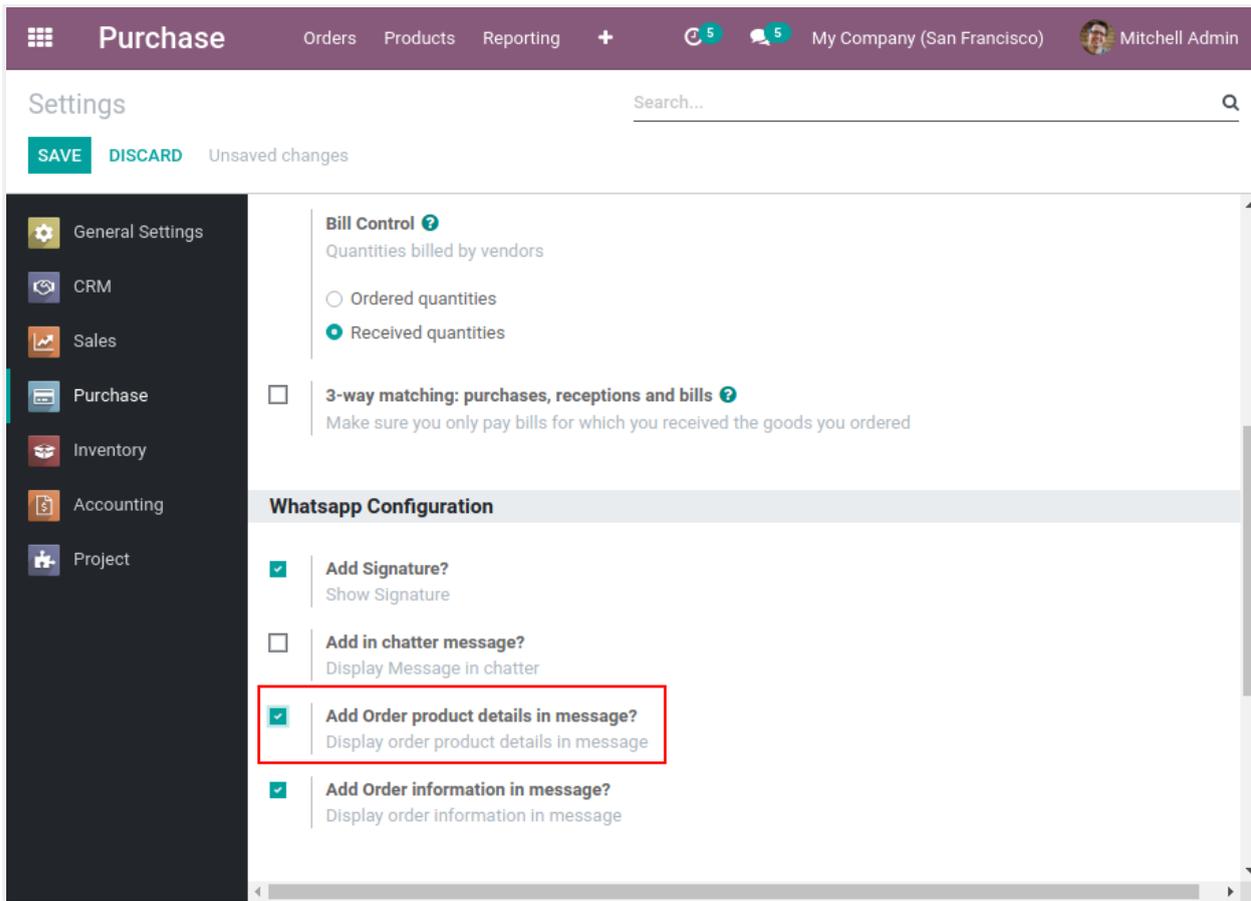
– Pragmatic Tech Soft Pvt. Ltd.

report_purchase_order
REPORT_PURCHASE_ORDER

Administrator - a minute ago
Purchase Order created

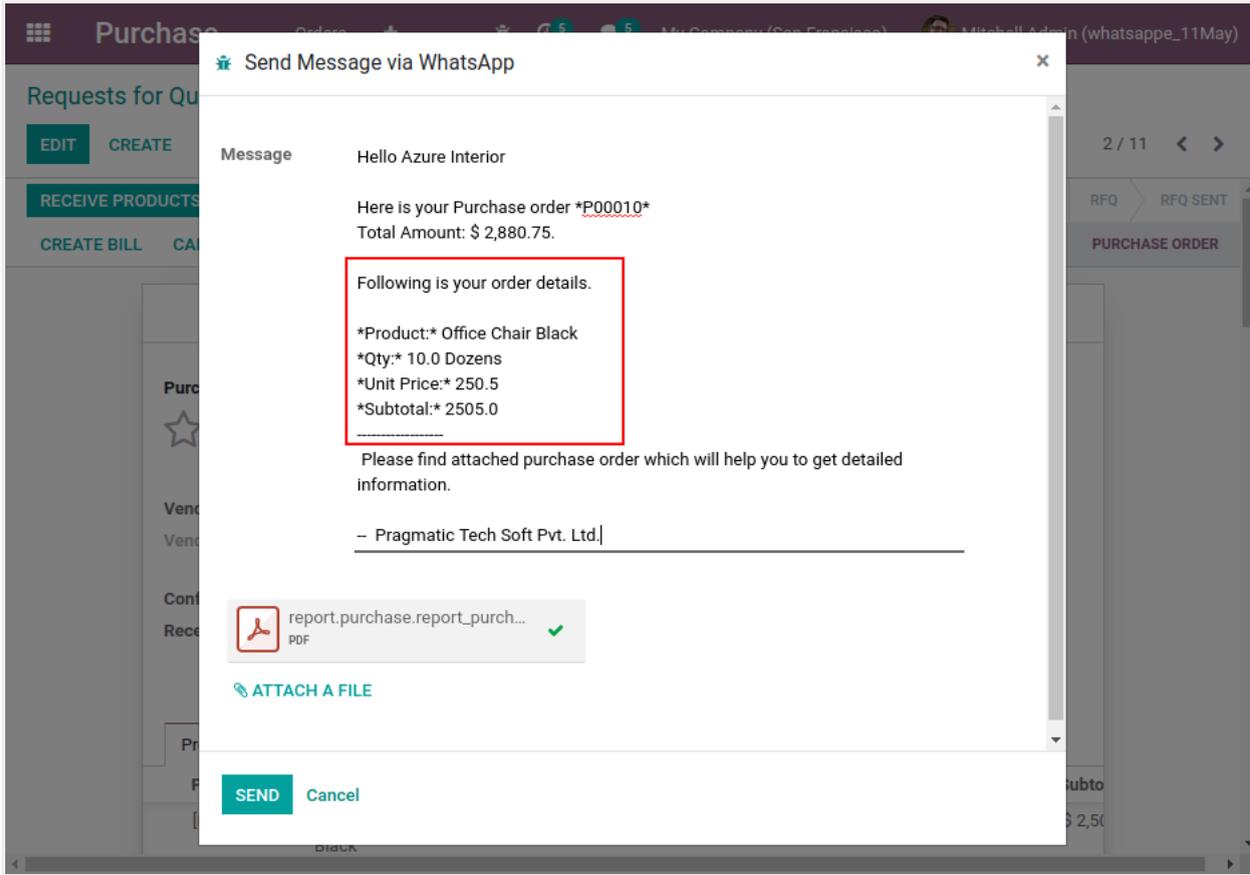
c) **Add Order product details to message:**

If order product details are enabled then the product name, unit price, quantity and subtotal is added in the whatsapp message.

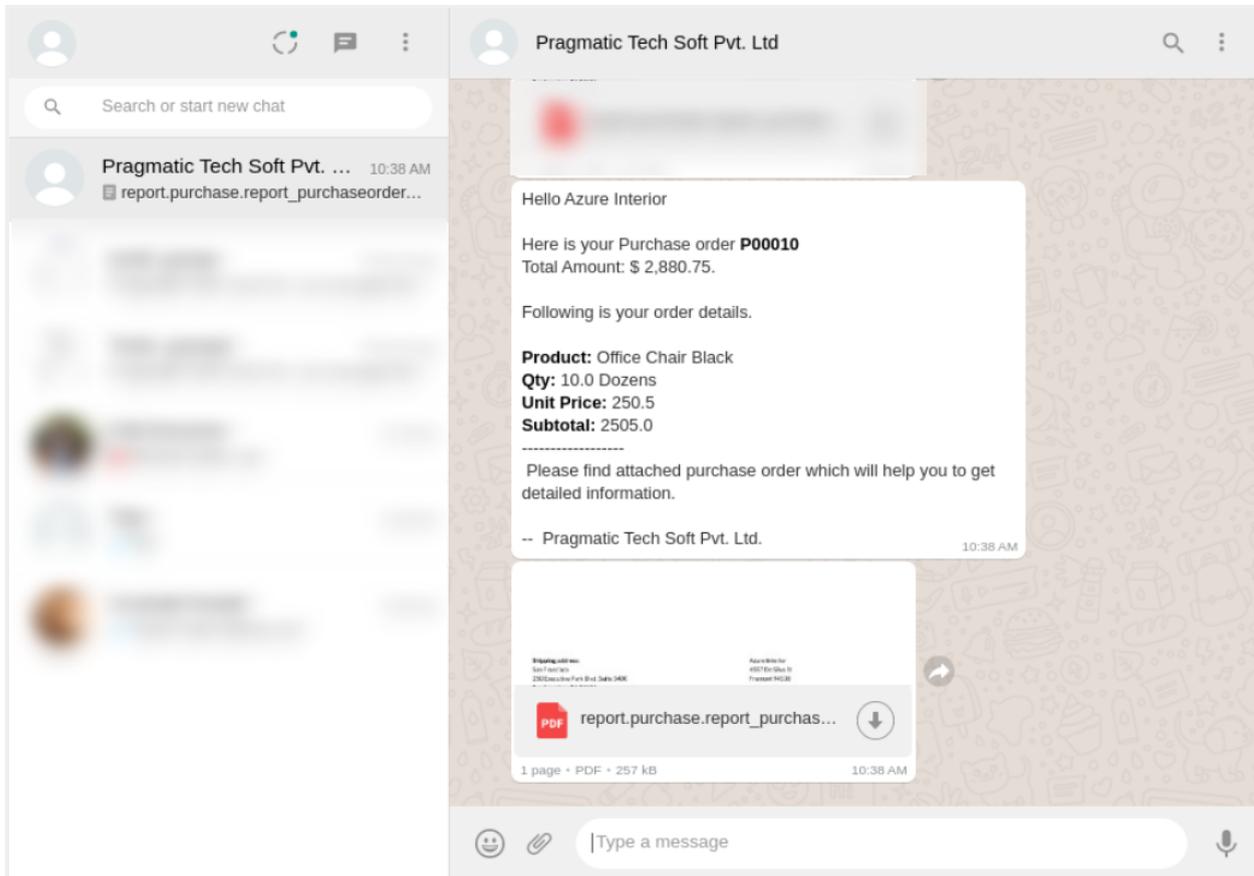


Product Order details added to message.

Click on send. Message is sent to the customer's mobile.



Message In whatsapp application(screenshot) from purchase order by adding order product details.



d) Add product information in the message:

If the Add order information is enabled then the order number, order total amount is added to the whatsapp message.

The screenshot shows the 'Purchase' module settings page. The top navigation bar includes 'Purchase', 'Orders', 'Products', 'Reporting', and a user profile 'Mitchell Admin'. The main content area is titled 'Settings' and includes a search bar and 'SAVE' and 'DISCARD' buttons. A sidebar on the left lists various settings categories: General Settings, CRM, Sales, Purchase, Inventory, Accounting, and Project. The 'Purchase' category is selected. The main content area is divided into sections: 'Bill Control' (with options for 'Ordered quantities' and 'Received quantities'), '3-way matching: purchases, receptions and bills' (unchecked), and 'Whatsapp Configuration'. The 'Whatsapp Configuration' section contains four options: 'Add Signature?' (checked), 'Add in chatter message?' (unchecked), 'Add Order product details in message?' (unchecked), and 'Add Order information in message?' (checked). The 'Add Order information in message?' option is highlighted with a red rectangular box.

Whatsapp Configuration

- Add Signature?**
Show Signature
- Add in chatter message?**
Display Message in chatter
- Add Order product details in message?**
Display order product details in message
- Add Order information in message?**
Display order information in message

Goto purchase order form view click on Send Whatsapp message button. Order information is added to message

Click on send. Message is sent to the customer's mobile.

The screenshot shows a 'Send Message via WhatsApp' dialog box overlaid on a software interface. The dialog contains the following text:

Message Hello Azure Interior

Here is your Purchase order *P00010*
Total Amount: \$ 2,880.75.

Please find attached purchase order which will help you to get detailed information.

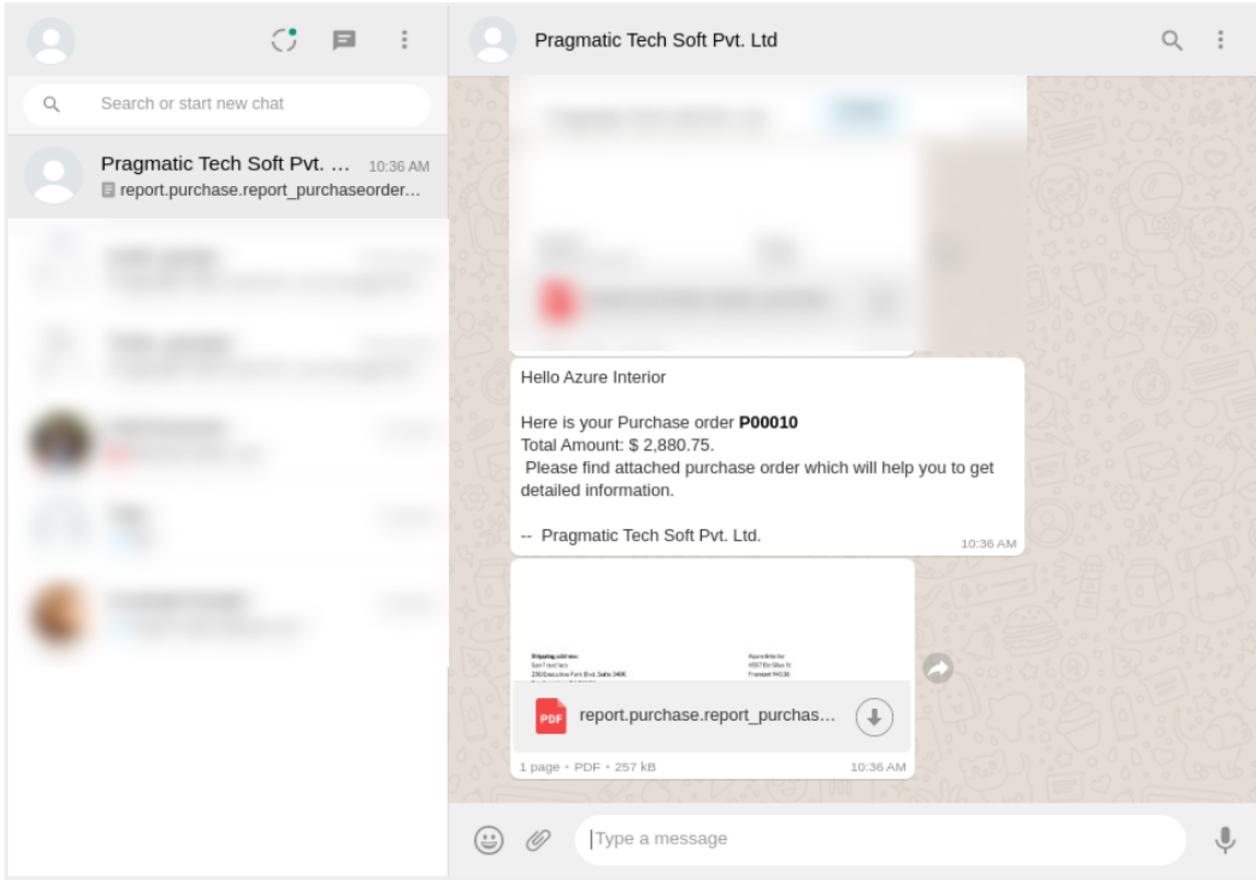
-- Pragmatic Tech Soft Pvt. Ltd.]

Below the text, there is a PDF attachment icon and the text 'report.purchase.report_purcha... PDF' with a green checkmark. Below the attachment is a blue link that says 'ATTACH A FILE'.

At the bottom of the dialog, there are two buttons: 'SEND' (in a teal box) and 'Cancel'.

The background software interface shows a 'Purchase' section with options like 'EDIT', 'CREATE', 'RECEIVE PRODUCTS', 'CREATE BILL', and 'PURCHASE ORDER'. A table at the bottom lists items with columns: Product, Description, Quantity, Received, Billed, Unit Price, Taxes, and Subtotal. One item is visible: [FURN_0269]... Office Chair Black, with a quantity of 10.00 and a unit price of 250.50. A tax rate of 15.00% is also shown.

Message in whatsapp application(screenshot) from purchase order by adding order information with attachment.



12) CRM:

We send newly created lead information to the assigned salesperson.

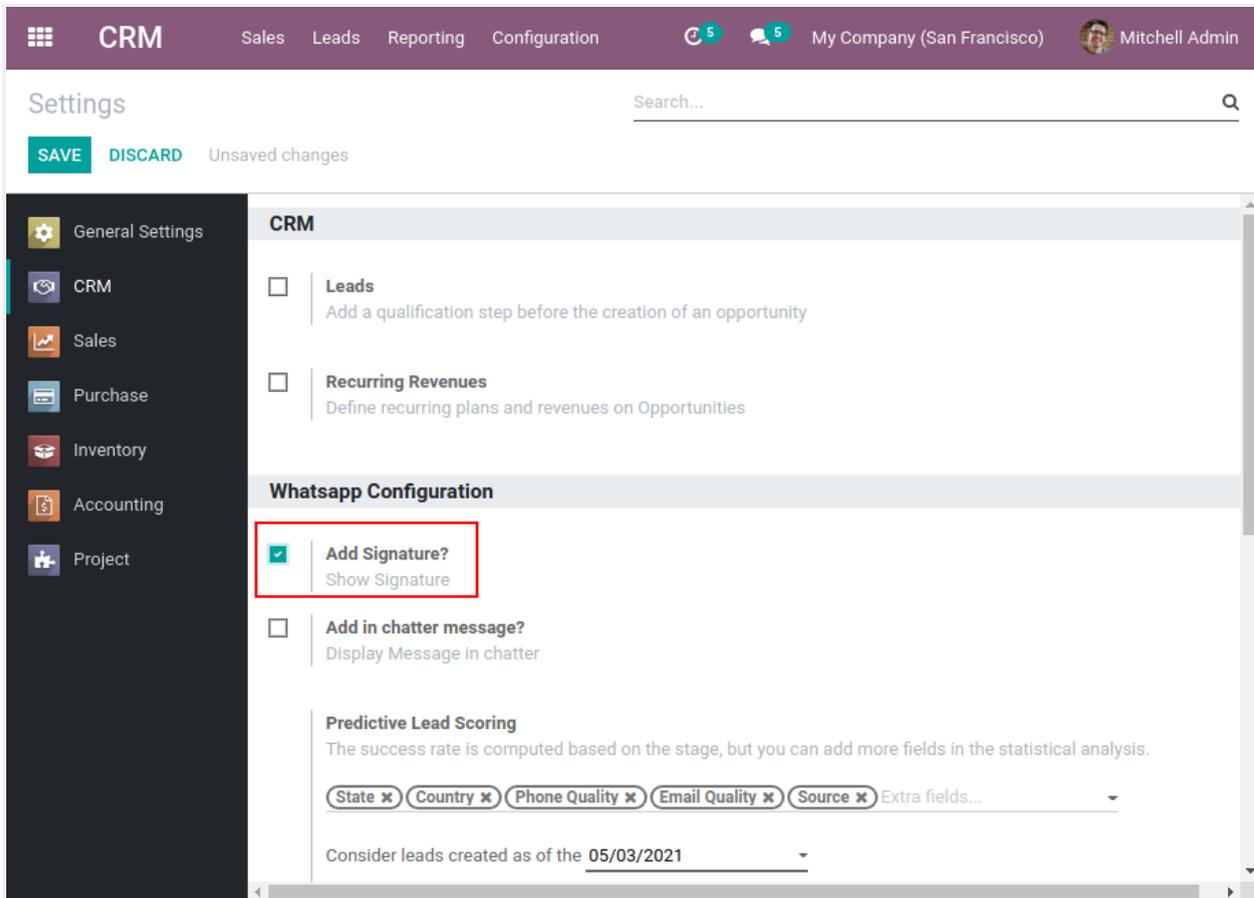
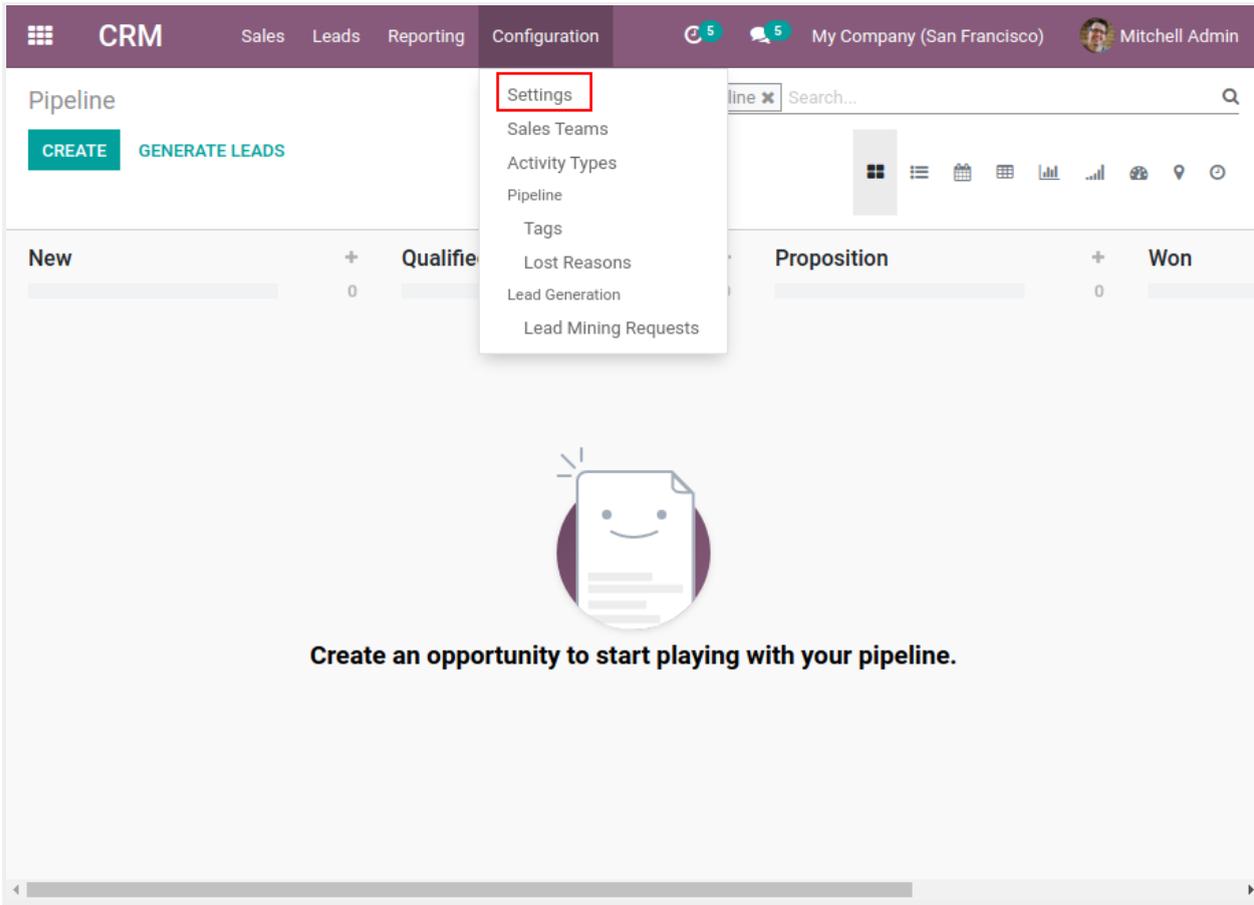
To activate lead menu in CRM goto Settings -> Users & Companies -> Users -> select login user -> enable Show Lead menu

The screenshot shows the 'Settings' interface for the 'Administrator' user. The breadcrumb trail is 'Users / Administrator'. The 'EDIT' button is highlighted in green. The 'Show Lead Menu' option is checked and highlighted with a red box. Other options include 'Purchase order product information in message?' (checked), 'Quotation Templates' (unchecked), 'Sale Receipt' (unchecked), 'Show Accounting Features - Readonly' (unchecked), 'Signature' (checked), 'Stock product details in message?' (checked), 'Stock send in chatter message?' (checked), 'Tax display B2C' (unchecked), 'Use Recurring Tasks' (unchecked), 'Purchase order send in chatter message?' (checked), 'Require a signature on your delivery orders' (unchecked), 'Send an automatic reminder email to confirm delivery' (checked), 'Show Full Accounting Features' (unchecked), 'Show Recurring Revenues Menu' (unchecked), 'Stock Signature' (checked), 'Stock product information in message?' (checked), 'Tax display B2B' (checked), 'Use Rating on Project' (unchecked), 'Use Subtasks' (unchecked), 'Extra Rights' (section header), 'Contact Creation' (checked), 'Multi Currencies' (unchecked), 'Other' (section header), 'Account Invoice Whatsapp Feature' (checked), 'Delivery Order Whatsapp Feature' (checked), 'Sale Order Whatsapp Feature' (checked), 'Account Payment Whatsapp Feature' (checked), and 'Purchase Order Whatsapp Feature' (checked).

Setting	Checked
Purchase order product information in message?	<input checked="" type="checkbox"/>
Quotation Templates	<input type="checkbox"/>
Sale Receipt	<input type="checkbox"/>
Show Accounting Features - Readonly	<input type="checkbox"/>
Show Lead Menu	<input checked="" type="checkbox"/>
Signature	<input checked="" type="checkbox"/>
Stock product details in message?	<input checked="" type="checkbox"/>
Stock send in chatter message?	<input checked="" type="checkbox"/>
Tax display B2C	<input type="checkbox"/>
Use Recurring Tasks	<input type="checkbox"/>
Purchase order send in chatter message?	<input checked="" type="checkbox"/>
Require a signature on your delivery orders	<input type="checkbox"/>
Send an automatic reminder email to confirm delivery	<input checked="" type="checkbox"/>
Show Full Accounting Features	<input type="checkbox"/>
Show Recurring Revenues Menu	<input type="checkbox"/>
Stock Signature	<input checked="" type="checkbox"/>
Stock product information in message?	<input checked="" type="checkbox"/>
Tax display B2B	<input checked="" type="checkbox"/>
Use Rating on Project	<input type="checkbox"/>
Use Subtasks	<input type="checkbox"/>
Extra Rights	
Contact Creation	<input checked="" type="checkbox"/>
Multi Currencies	<input type="checkbox"/>
Other	
Account Invoice Whatsapp Feature	<input checked="" type="checkbox"/>
Delivery Order Whatsapp Feature	<input checked="" type="checkbox"/>
Sale Order Whatsapp Feature	<input checked="" type="checkbox"/>
Account Payment Whatsapp Feature	<input checked="" type="checkbox"/>
Purchase Order Whatsapp Feature	<input checked="" type="checkbox"/>

Configuration:

You can send a whatsapp message by configuring Add signature, Add message in chatter.
Goto CRM -> Configuration -> Settings



a) Add Signature:

The screenshot shows the CRM interface for 'Customisation of whatsapp Connector'. The top navigation bar includes 'Sales', 'Leads', 'Reporting', and 'Configuration'. The user is logged in as 'Administrator (whatsapp_odoobot_23June1)'. The page has buttons for 'EDIT', 'CREATE', and 'Action'. Below these are buttons for 'CONVERT TO OPPORTUNITY', 'ENRICH', and 'MARK AS LOST'. The main content area displays the following details:

Customer	test1_user	Contact Name	test1_user
Company Name		Email	test1_user@gmail.com
Address	India	Email cc	
Website		Job Position	
Language		Phone	
Salesperson	Administrator	Mobile	+91 72769 33864 SMS
Sales Team	Sales	Priority	☆☆☆
		Tags	

Below the details are tabs for 'Internal Notes' and 'Extra Info'. A note at the bottom states: 'Need to add bidirectional features.'

Message sent in whatsapp app (screenshot) of CRM Lead by adding signature.

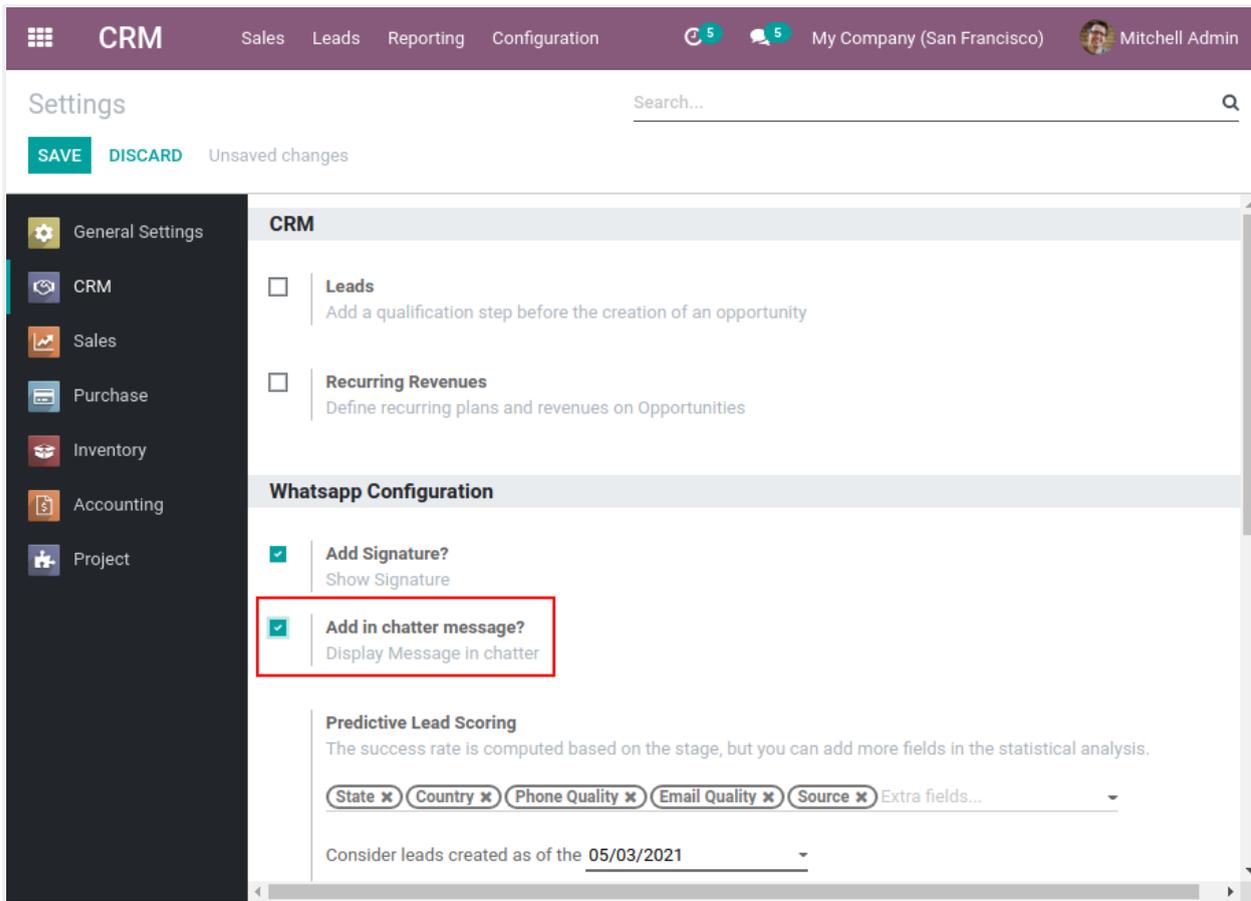
The screenshot shows a WhatsApp chat interface. The contact is 'Pragmatic Tech Soft Pvt. Ltd.'. The message content is as follows:

Hello Mitchell Admin,
New lead assigned to you
Lead name: Odoo website planning
Customer: Azure Interior
Email: azure.Interior24@example.com
Phone: +91 87093 10505
Expected closing date: 2021-05-31
Description: Task for Odoo website planning

-- Pragmatic Tech Soft Pvt. Ltd. 1:19 AM

b) **Add to chatter message:**

If **Add in chatter message** is enabled, WhatsApp message will be added to chat with proper formatting.



The screenshot displays the CRM Settings interface. At the top, there is a navigation bar with 'CRM' and 'Sales Leads Reporting Configuration' tabs, along with user information for 'My Company (San Francisco)' and 'Mitchell Admin'. Below the navigation bar, the 'Settings' page is shown with a search bar and 'SAVE' and 'DISCARD' buttons. The left sidebar lists various settings categories: General Settings, CRM, Sales, Purchase, Inventory, Accounting, and Project. The main content area is titled 'CRM' and contains several configuration options. Under the 'Whatsapp Configuration' section, the 'Add in chatter message?' option is checked and highlighted with a red box. Below this, there is a 'Predictive Lead Scoring' section with a date selector set to '05/03/2021'.

CRM

Leads
Add a qualification step before the creation of an opportunity

Recurring Revenues
Define recurring plans and revenues on Opportunities

Whatsapp Configuration

Add Signature?
Show Signature

Add in chatter message?
Display Message in chatter

Predictive Lead Scoring
The success rate is computed based on the stage, but you can add more fields in the statistical analysis.

Extra fields... ▾

Consider leads created as of the ▾

A Whatsapp message sent successfully will track in message chatter.

CRM Sales Leads + 5 5 My Company (San Francisco) Mitchell Admin (whatsappe_11May)

Pipeline / Percentage or dollar discounts or coupons

EDIT CREATE Action 3 / 3 < >

Internal Notes Extra Information

Testing percentage or dollar discounts or coupons

Send message Log note Schedule activity 0 Following 1

Today

 **Mitchell Admin** - now
Hello Mitchell Admin,
New lead assigned to you
Lead name: Percentage or dollar discounts or coupons
Customer: Azure Interior
Email: azure.Interior24@example.com
Phone: +91 87093 10505
Expected closing date: 2021-05-20
Description: Testing percentage or dollar discounts or coupons
-- Pragmatic Tech Soft Pvt. Ltd.

 **Mitchell Admin** - now
Lead/Opportunity created

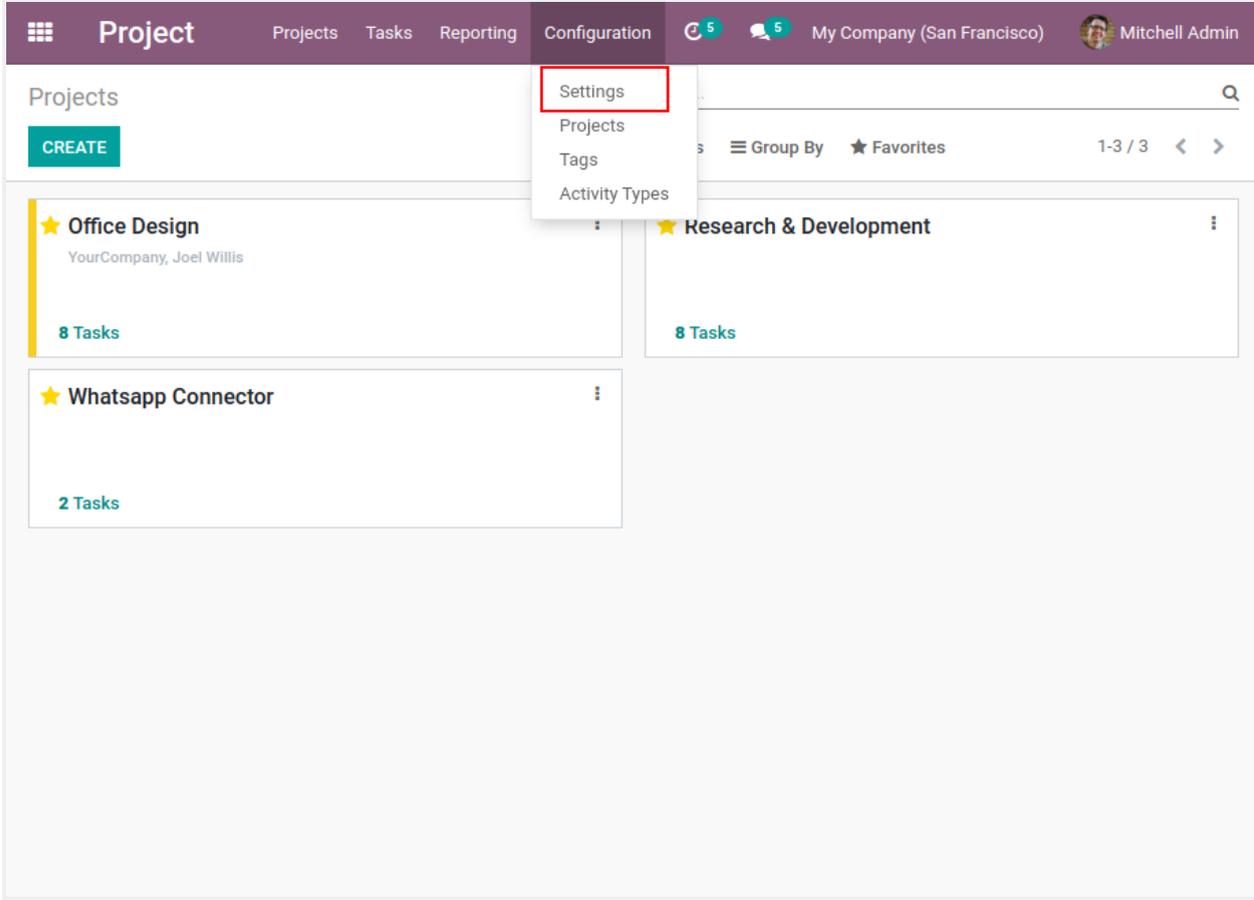
13) Project Task:

We send newly created task information to the assigned salesperson.

Configuration:

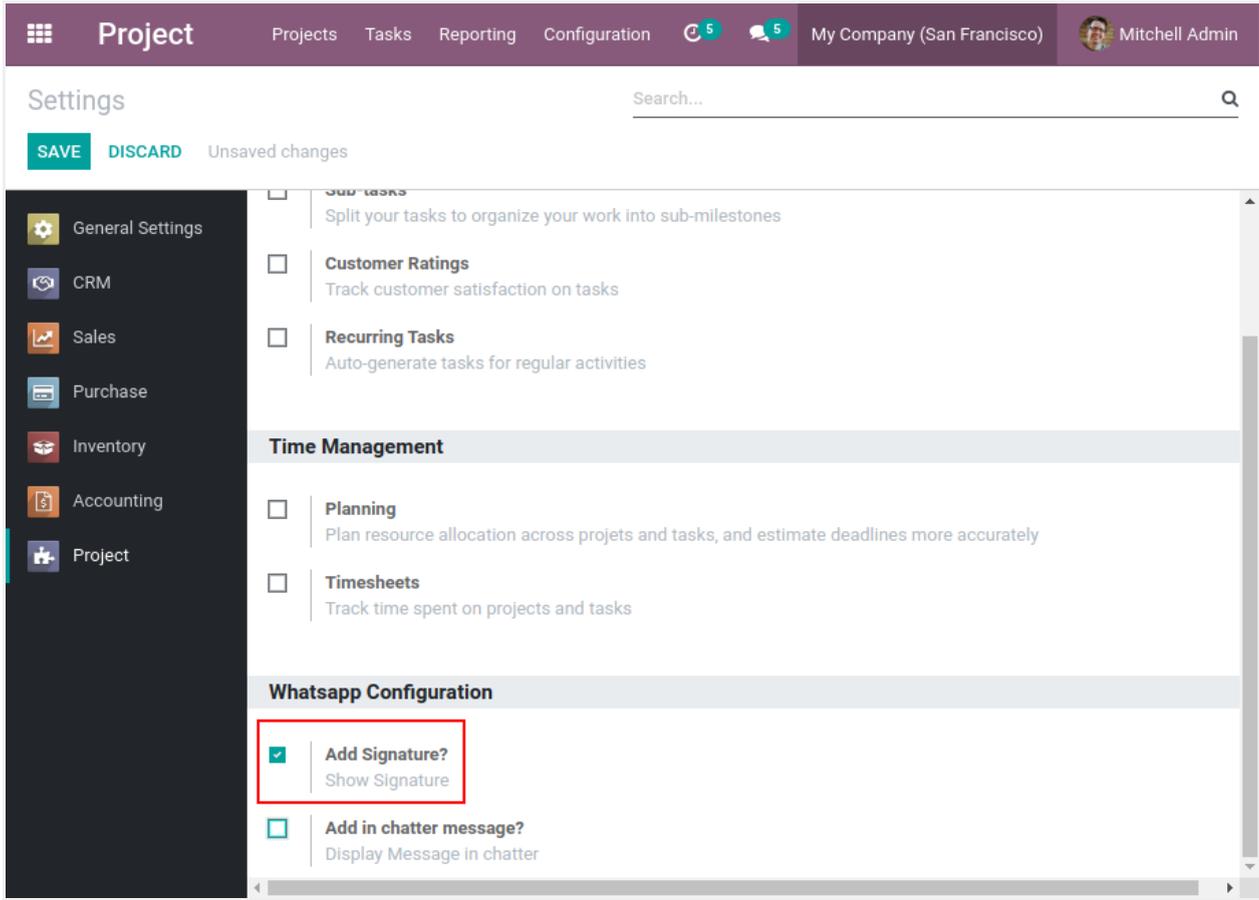
You can send a whatsapp message by configuring Add signature, Add message in chatter.

Goto Project -> Configuration -> Settings

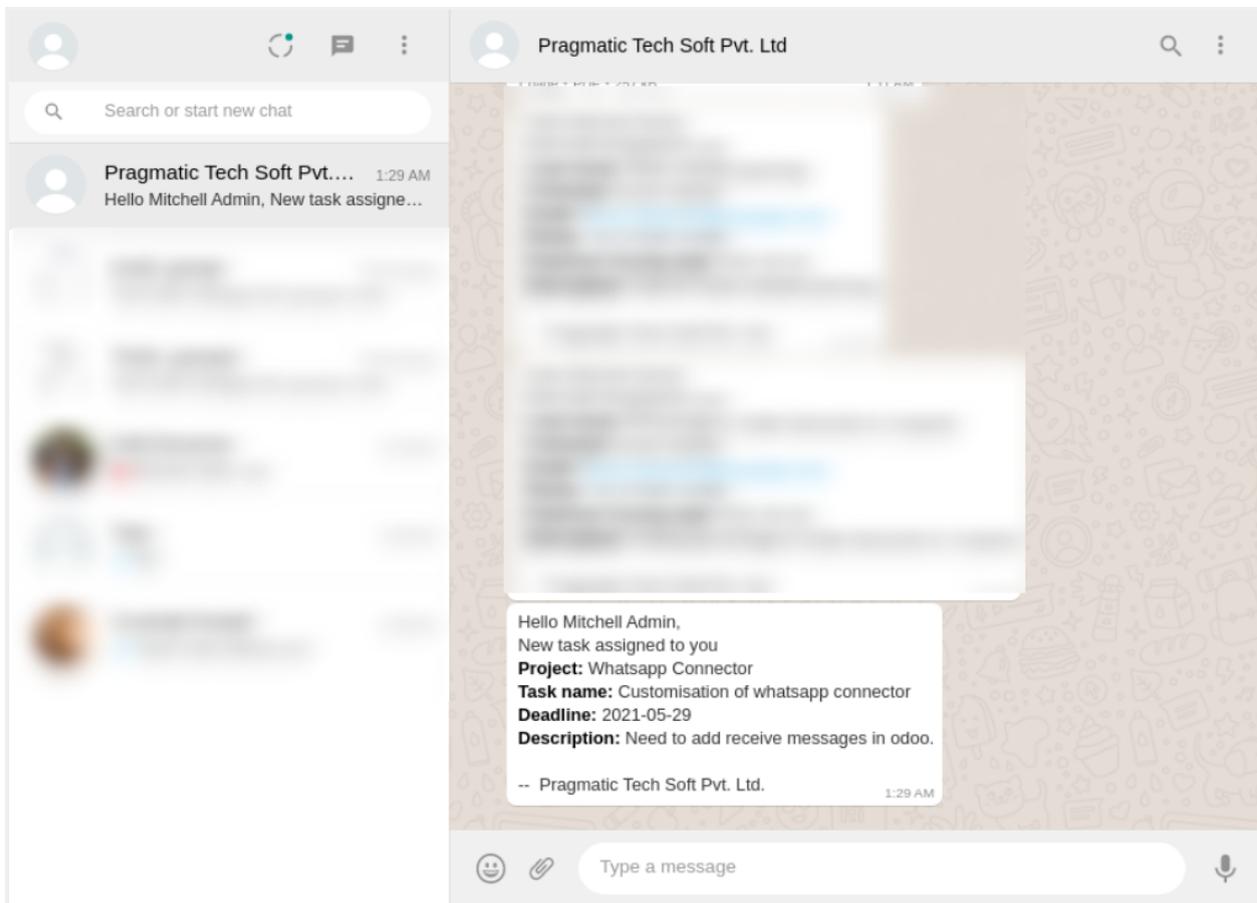


When we create a task, a whatsapp message will be sent to Assigned to user

a) **Add Signature:**

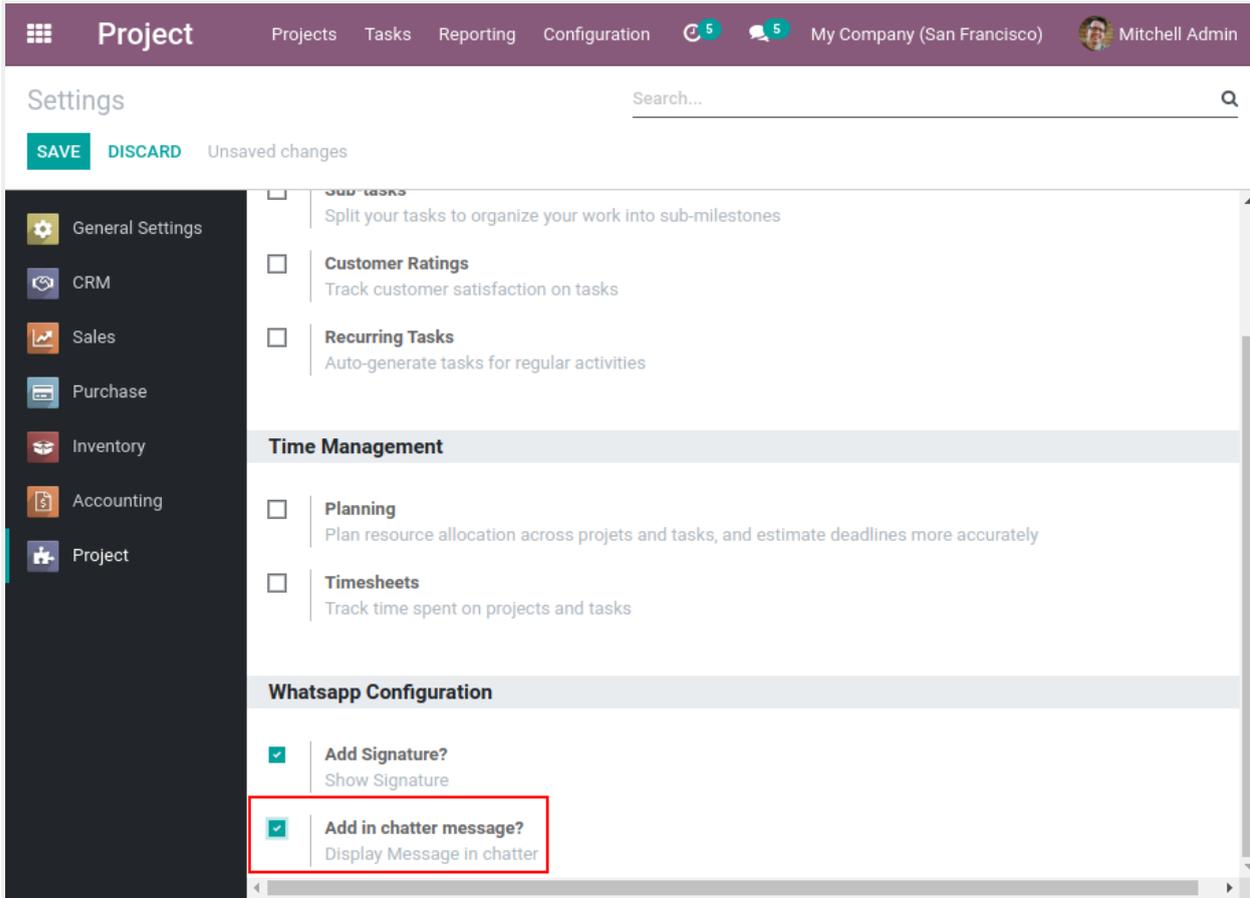


Message sent in whatsapp app (screenshot) of Project Task by adding signature.



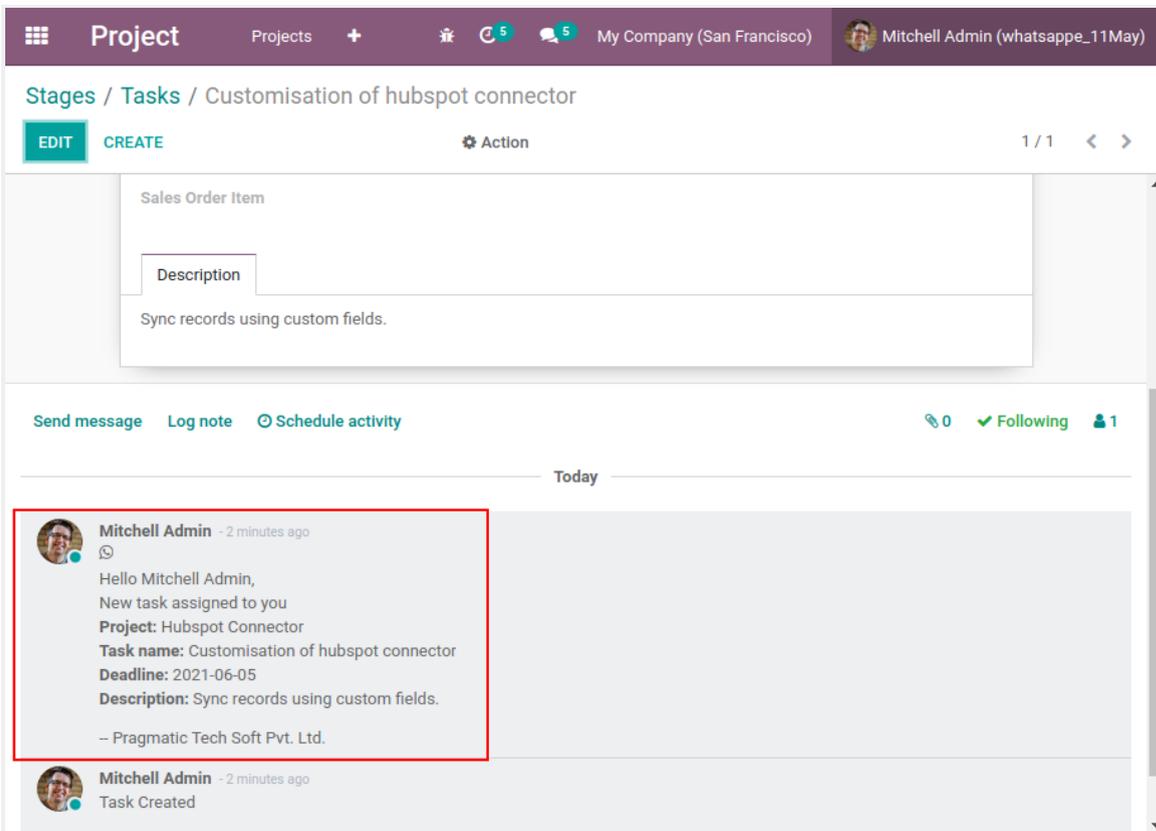
b) Add to chatter message:

If **Add in chatter message** is enabled, WhatsApp message will be added to chat with proper formatting.



The screenshot shows the 'Settings' page for a 'Project' in a software application. The left sidebar contains navigation options: General Settings, CRM, Sales, Purchase, Inventory, Accounting, and Project. The main content area is titled 'Settings' and includes a search bar and a 'SAVE' button. Below this, there are several configuration sections: 'Sub-tasks', 'Customer Ratings', 'Recurring Tasks', 'Time Management' (with 'Planning' and 'Timesheets' options), and 'Whatsapp Configuration'. In the 'Whatsapp Configuration' section, the option 'Add in chatter message?' is checked and highlighted with a red box. Other options include 'Add Signature?' and 'Add Signature? Show Signature'.

Whatsapp message sent successfully this will track in message chatter



The screenshot shows a WhatsApp chat interface. The header includes the 'Project' name, navigation icons, and the user's name 'Mitchell Admin (whatsapp_11May)'. The chat content shows a message from 'Mitchell Admin' sent 2 minutes ago. The message text is: 'Hello Mitchell Admin, New task assigned to you Project: Hubspot Connector Task name: Customisation of hubspot connector Deadline: 2021-06-05 Description: Sync records using custom fields. - Pragmatic Tech Soft Pvt. Ltd.' This message is highlighted with a red box. Below it, another message from 'Mitchell Admin' says 'Task Created'.

For task stage changes to Done:

Goto Project -> Configuration -> Stages -> Create stage (Give name is Done or done).

The screenshot shows the 'Project' configuration interface. The top navigation bar includes 'Project', 'Projects', 'Tasks', 'Reporting', and a user profile 'Administrator (whatsapp_16sept)'. The main content area is titled 'Stages / Done' and features 'EDIT' and 'CREATE' buttons. A settings icon and 'Action' label are also present. The configuration details for the 'Done' stage are as follows:

Stage Name	Done
Email Template	
Folded in Kanban	<input type="checkbox"/>
Closing Stage	<input type="checkbox"/>
Projects	
Sequence	1

Stage Description and Tooltips

At each stage employees can block or make task/issue ready for next stage. You can define here labels that will be displayed for the state instead of the default labels.

- In Progress
- Blocked
- Ready

You can also add a description to help your coworkers understand the meaning and purpose of the stage.

When a task is created a message is sent to the assigned user's whatsapp mobile number.

If the user replies to the same message as **Done** or **done** and when the background scheduler is run, that particular task stage changes to **Done**.

The screenshot shows a web interface for a project task. At the top, there is a navigation bar with a grid icon, the word 'Project', and several icons including a plus sign, a refresh icon with a '5', and a speech bubble icon with a '5'. The user's name 'Mitchell Admin (whatsapp_11May)' is visible in the top right. Below the navigation bar, the breadcrumb 'Tasks / Customisation of hubspot connector' is shown. There are two buttons: 'EDIT' (highlighted in teal) and 'CREATE'. An 'Action' menu icon is also present. On the right side, there is a '5 / 11' indicator and navigation arrows. A red box highlights a 'DONE' button in the top right corner of the task card. The task card itself has a star icon and the title 'Customisation of hubspot connector'. It contains a metadata section with the following details: Project: Hubspot Connector, Assigned to: Mitchell Admin, Whatsapp id: true_91[redacted]6@c.us_3EB017A2AD253B8E3DB0, Tags: (empty), Customer: Azure Interior, Sales Order Item: (empty). Below this is a 'Description' section with the text 'Sync records using custom fields.' At the bottom of the task card, there are three buttons: 'Send message', 'Log note', and 'Schedule activity'. To the right of these buttons are icons for '0' notifications, 'Following' status, and '1' user. At the very bottom of the interface, there is a 'Today' label and a dropdown arrow.

13) Point Of Sale:

When an order is created from a point of sale, order details are sent to the customer's mobile number in text format.

Create an order -> click on Send Whatsapp Message

The screenshot shows a POS system interface. At the top, there is a purple header with 'Orders' and a 'Close' button. A green button labeled 'New Order >' is in the top right. Below this, a question asks 'How would you like to receive your receipt?'. Two buttons are shown: 'Send Whatsapp message' (highlighted with a red box) and 'Print Receipt'. Below these is an email input field with 'admin@example.com' and a 'Send' button. At the bottom, a receipt preview is shown with a logo placeholder, company name 'My Company', and server 'Served by Administrator'. The receipt lists items: 'Desk Organizer' (5.10) and 'Whiteboard Pen' (1.20). Subtotal is \$6.30, tax is 0.95, and the total is \$7.25. Payment is 'Cash' (10.00) and the change is \$2.75.

1 Orders Close

New Order >

How would you like to receive your receipt?

Send Whatsapp message Print Receipt

admin@example.com Send

Your logo

My Company

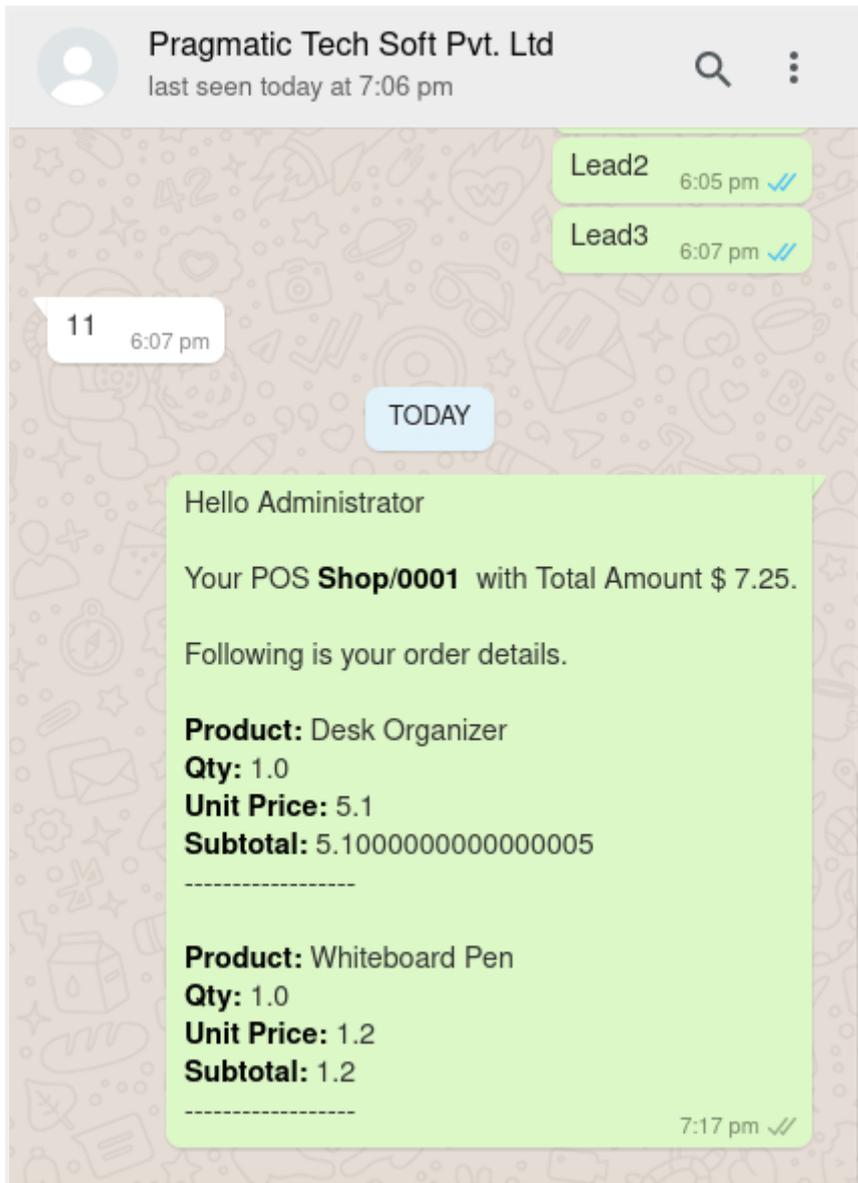
Served by Administrator

Desk Organizer	5.10
Whiteboard Pen	1.20

Subtotal	\$ 6.30
Tax 15.00%	0.95

TOTAL	\$ 7.25
Cash	10.00
CHANGE	\$ 2.75

Message In whatsapp application(screenshot) from point of sale.



When a task is created a message is sent to the assigned user's whatsapp mobile number.

If the user replies to the same message as **Done** or **done** that particular task stage changes to **Done**.

The screenshot shows a project task interface. At the top, there is a navigation bar with 'Project' and 'Projects +'. Below that, the breadcrumb 'Tasks / Customisation of hubspot connector' is visible. The task details are as follows:

- Project:** Hubspot Connector
- Assigned to:** Mitchell Admin
- Whatsapp id:** true_91[redacted]6@c.us_3EB017A2AD253B8E3DB0
- Customer:** Azure Interior
- Description:** Sync records using custom fields.

At the bottom of the task card, there are buttons for 'Send message', 'Log note', and 'Schedule activity'. On the right side of the task card, there is a 'DONE' button highlighted with a red box. The interface also shows '5 / 11' items and navigation arrows.

14) Schedulers:

Whatsapp - Payment reminder send message

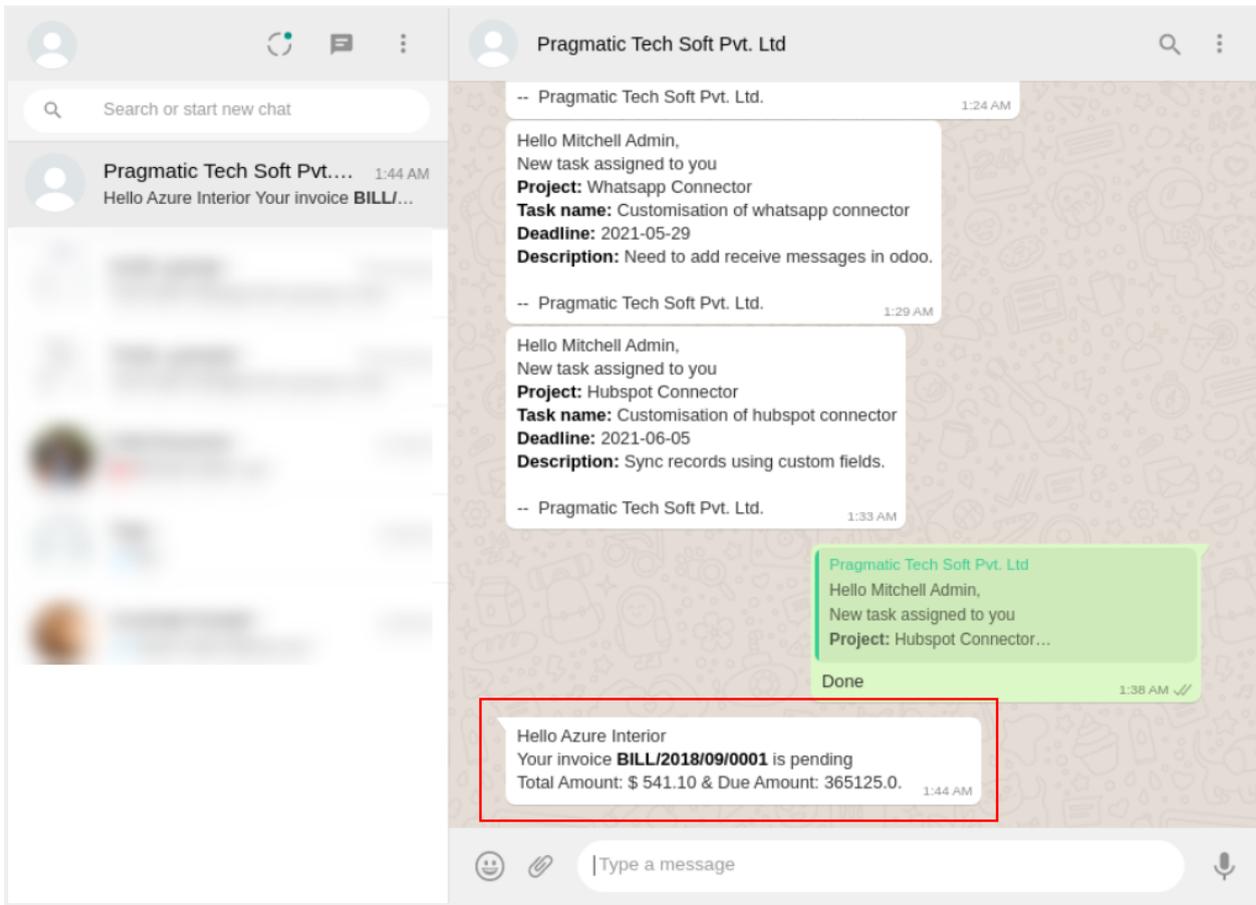
The screenshot shows the Odoo Scheduler configuration interface. The top navigation bar includes the 'Settings' menu, 'General Settings', and a user profile for 'Administrator (whatsapp_16sept)'. The main heading is 'Scheduled Actions' with a breadcrumb trail '/ Whatsapp - Payment reminder send m...'. Below this, there are buttons for 'EDIT' and 'CREATE', and an 'Action' icon. The configuration details for the scheduler are as follows:

Model	Journal Entry
Scheduler User	Odoobot
Execute Every	10Minutes
Active	<input type="checkbox"/>
Next Execution Date	09/16/2021 18:50:39
Number of Calls	-1
Priority	5
Repeat Missed	<input type="checkbox"/>
Available on the Website	<input type="checkbox"/>

Below the configuration details, there are three tabs: 'Python Code', 'Security', and 'Help'. The 'Python Code' tab is active, showing the following code:

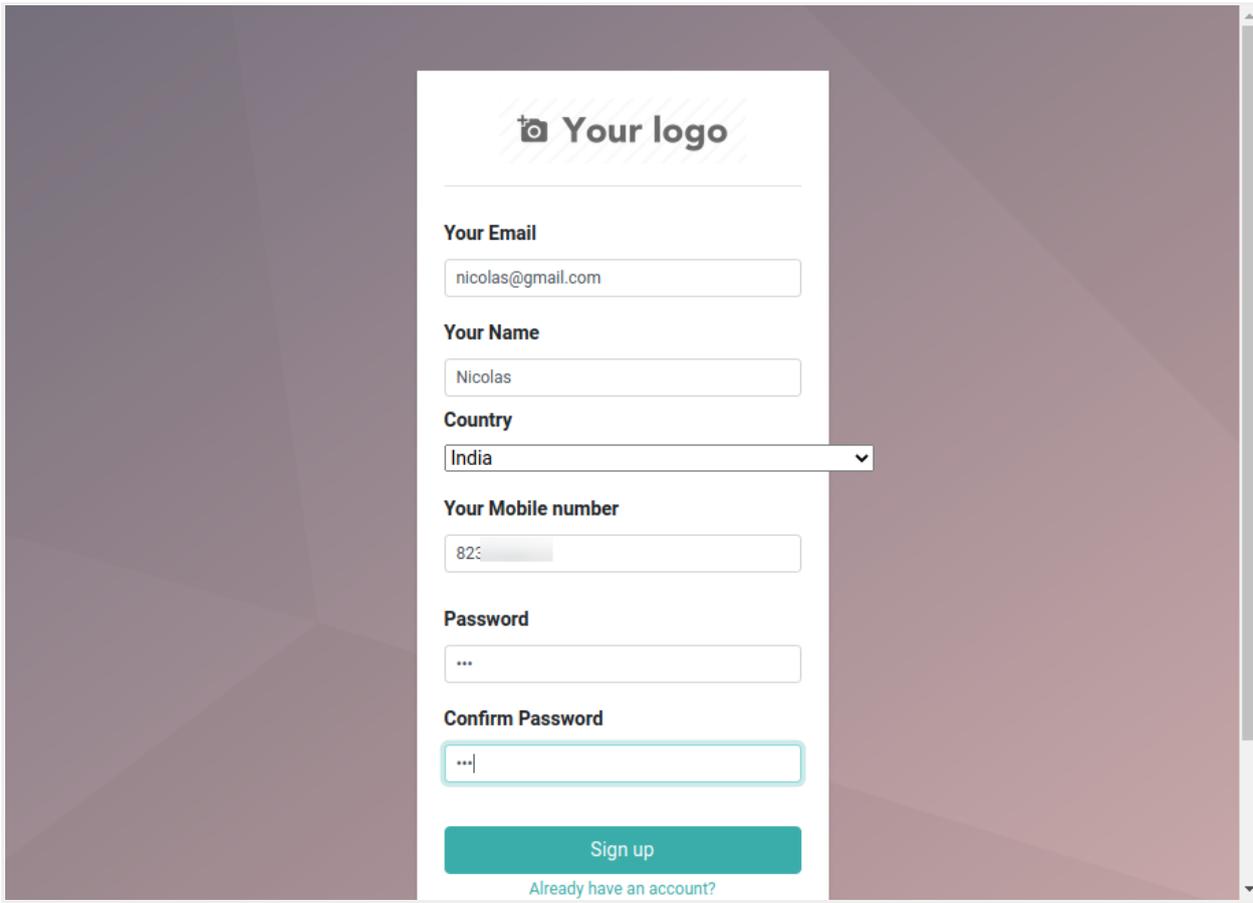
```
1 _payment_reminder_send_message()
```

For payment reminders, if a customer overdue an invoice then a message will be sent on customer mobile using the "Whatsapp - Payment reminder send message" scheduler.



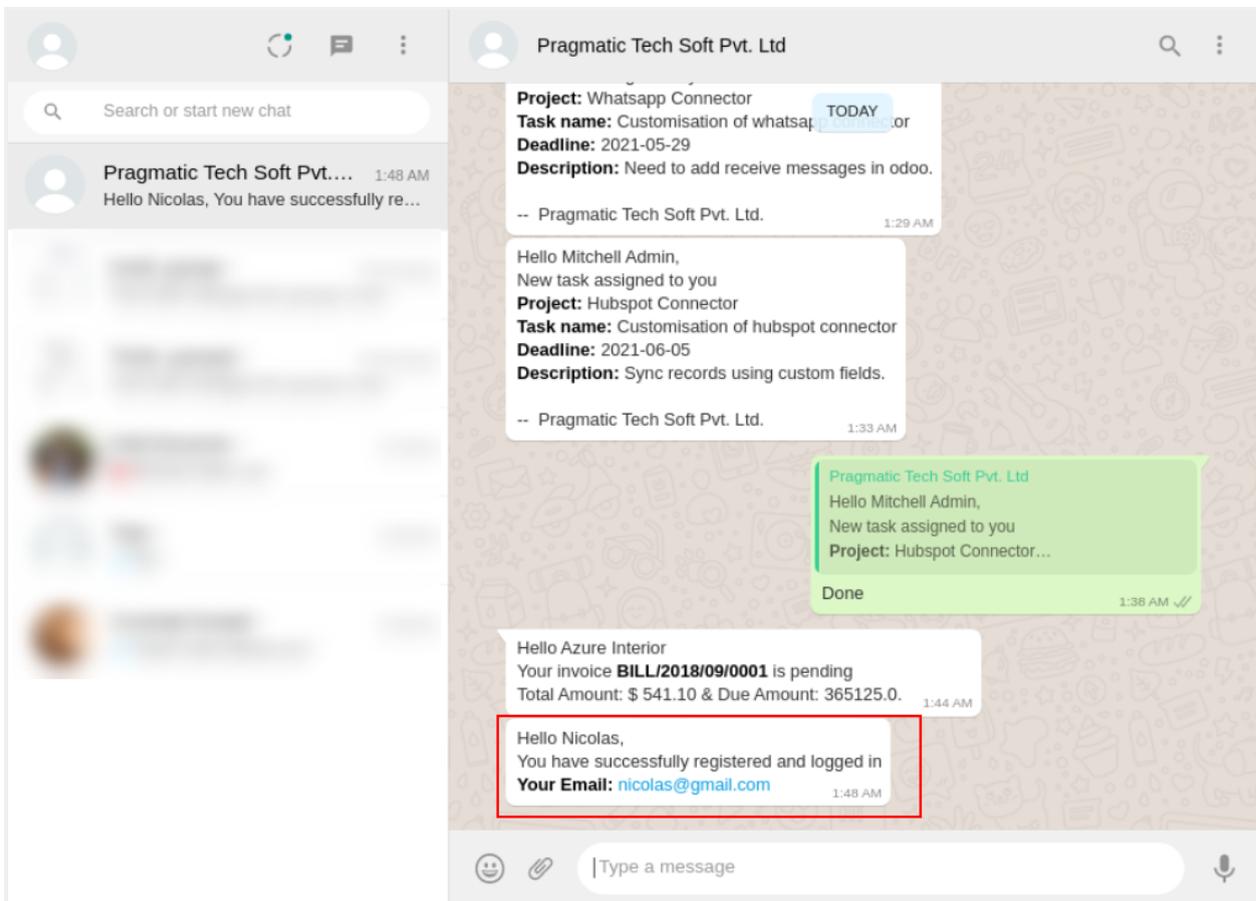
15) User Signup Page:

From the website user signup page, if the user enters the mobile number & country then a Welcome message will be sent to corresponding mobile number



The screenshot shows a user signup form with the following fields and elements:

- Your logo:** A placeholder for a logo with a camera icon.
- Your Email:** Input field containing "nicolas@gmail.com".
- Your Name:** Input field containing "Nicolas".
- Country:** Dropdown menu with "India" selected.
- Your Mobile number:** Input field containing "823".
- Password:** Input field with masked characters "..."
- Confirm Password:** Input field with masked characters "..."
- Sign up:** A teal button.
- Already have an account?:** A link below the sign up button.



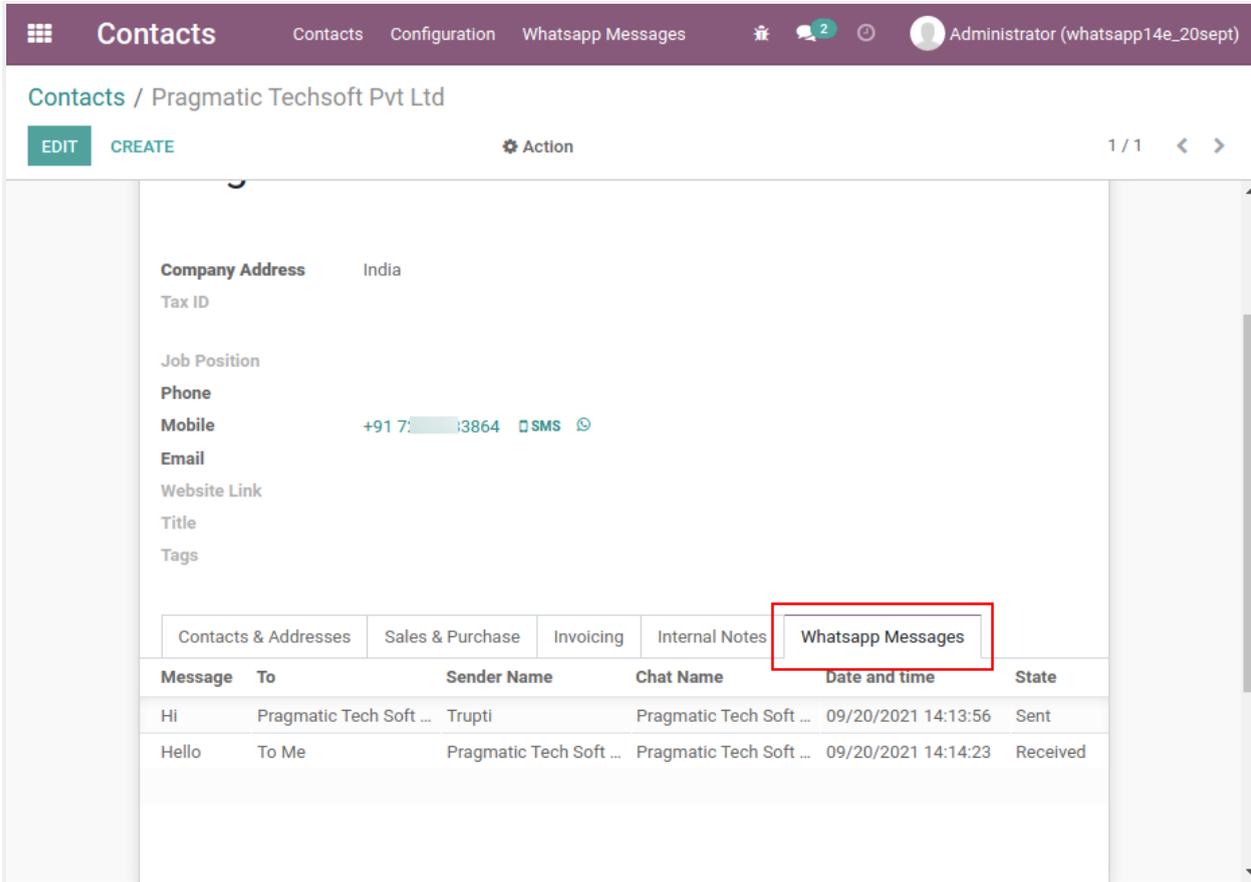
16) Bi-directional feature

Connector can send & receive messages from whatsapp in Odoo:

When we send a message from odoo, a message is added in the form view of the respective contact and in the master of the WhatsApp message as shown in the below screenshot.

i) Contact Form

Whatsapp sent & received messages are shown in the contact form view of the Whatsapp Messages.



The screenshot displays the Odoo interface for a contact form. The contact is 'Pragmatic Techsoft Pvt Ltd'. The 'Whatsapp Messages' tab is selected and highlighted with a red box. Below the tabs, a table lists the messages:

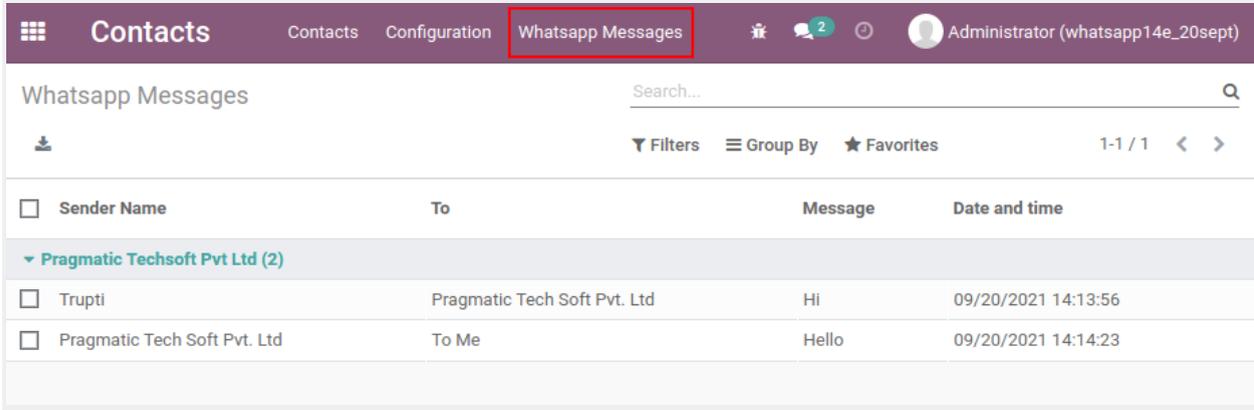
Message	To	Sender Name	Chat Name	Date and time	State
Hi	Pragmatic Tech Soft ...	Trupti	Pragmatic Tech Soft ...	09/20/2021 14:13:56	Sent
Hello	To Me	Pragmatic Tech Soft ...	Pragmatic Tech Soft ...	09/20/2021 14:14:23	Received

Add separate section and description

ii) Bi-directional messages

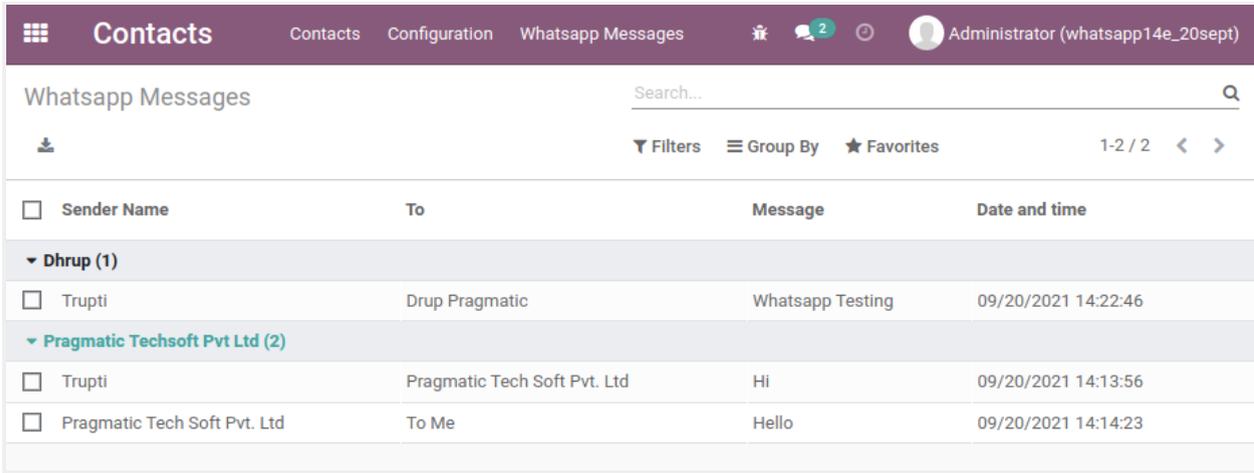
Also has a separate Whatsapp Messages menu. All bidirectional messages will show in whatsapp messages

On Message Receive, a message will be added to the respective contact to view and master WhatsApp messages.



<input type="checkbox"/>	Sender Name	To	Message	Date and time
▼ Pragmatic Techsoft Pvt Ltd (2)				
<input type="checkbox"/>	Trupti	Pragmatic Tech Soft Pvt. Ltd	Hi	09/20/2021 14:13:56
<input type="checkbox"/>	Pragmatic Tech Soft Pvt. Ltd	To Me	Hello	09/20/2021 14:14:23

On WhatsApp Message master Messages are grouped by the customer by default.



<input type="checkbox"/>	Sender Name	To	Message	Date and time
▼ Dhrup (1)				
<input type="checkbox"/>	Trupti	Drup Pragmatic	Whatsapp Testing	09/20/2021 14:22:46
▼ Pragmatic Techsoft Pvt Ltd (2)				
<input type="checkbox"/>	Trupti	Pragmatic Tech Soft Pvt. Ltd	Hi	09/20/2021 14:13:56
<input type="checkbox"/>	Pragmatic Tech Soft Pvt. Ltd	To Me	Hello	09/20/2021 14:14:23

17) Odoobot:-

Odoo is used by users.

Odoobot is part of the pre-approved SMEs Go Digital solutions specializing in Ecommerce Website Software equipped with Enterprise Resource Planning modules. When operators are unavailable in Odoo & one of the users sends messages to the operator then the message is sent to their mobile number.

Configuration:

Goto Live chat -> create new channel

In the Channel Rules page select Auto popup, add URL Regex, Auto popup timer.

Publish channel.

The screenshot shows the Odoo Live Chat configuration interface. At the top, there is a navigation bar with 'Live Chat' and sub-headers 'Channels', 'Visitors', and 'Report'. The user is logged in as 'Administrator (whatsapp_odoobot_14e)'. The main heading is 'Website Live Chat Channels / Whatsapp Testing'. Below this, there are buttons for 'EDIT', 'CREATE', and 'Action', along with a '2 / 2' indicator and navigation arrows. A 'LEAVE CHANNEL' button is also visible. The main content area is titled 'Whatsapp Testing' and contains a 'Go to Website' button. Below the title, there are tabs for 'Operators', 'Options', 'Channel Rules', and 'Widget'. The 'Channel Rules' tab is active, showing a table with columns for 'URL Regex', 'Action', and 'Country'. A single rule is listed with the URL Regex '/whatsapp_live_chat', the Action 'Auto popup', and the Country 'No records'. A descriptive text below the table explains that rules can be applied based on URL and country, and that GeoIP must be installed for country-based rules to work.

URL Regex	Action	Country
/whatsapp_live_chat	Auto popup	No records

You can be an operator.

Live Chat Channels Visitors + Administrator (whatsapp14e_20sept)

Website Live Chat Channels / YourWebsite.com

EDIT CREATE Action 1 / 1 < >

LEAVE CHANNEL

1 Sessions

YourWebsite.com



Operators Options Channel Rules Widget

 **Administrator**

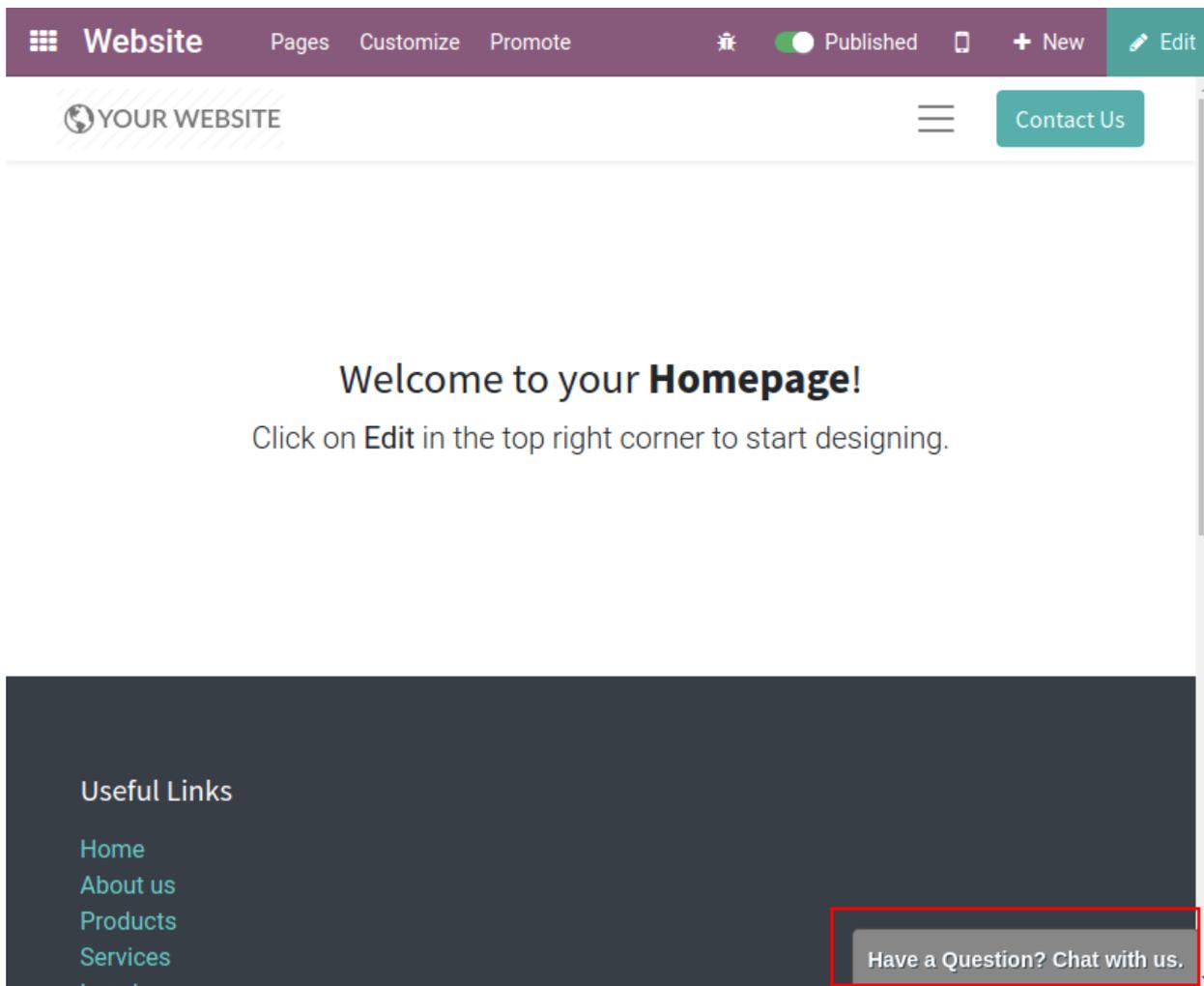
Operators that do not show any activity in Odoo for more than 30 minutes will be considered as disconnected.

Send a whatsapp message from the website odoobot.

a) Login user:

From current login user

Goto Website in bottom right corner you will get a small window. Click on the window & send message



Messages are sent to operators which you have added in livechat.

The image shows a website dashboard with a purple header bar. The header contains the text "Website" and several navigation links: "Pages", "Customize", "Promote", "Published" (with a toggle switch), "+ New", and "Edit". Below the header, there is a white navigation bar with a globe icon and the text "YOUR WEBSITE", a hamburger menu icon, and a "Contact Us" button. The main content area displays a large heading "Welcome to your Homepage!" and a sub-heading "Click on Edit in the top right corner". A livechat window is open on the right side, showing a message from "Administrator" with the text "Hello from admin". The livechat window has a purple header with the text "Administrator Administrator" and a close button. Below the livechat window, there is a dark grey sidebar with the heading "Useful Links" and a list of links: "Home", "About us", "Products", "Services", and "Legal".

Website Pages Customize Promote Published + New Edit

YOUR WEBSITE Contact Us

Welcome to your Homepage!

Click on Edit in the top right corner

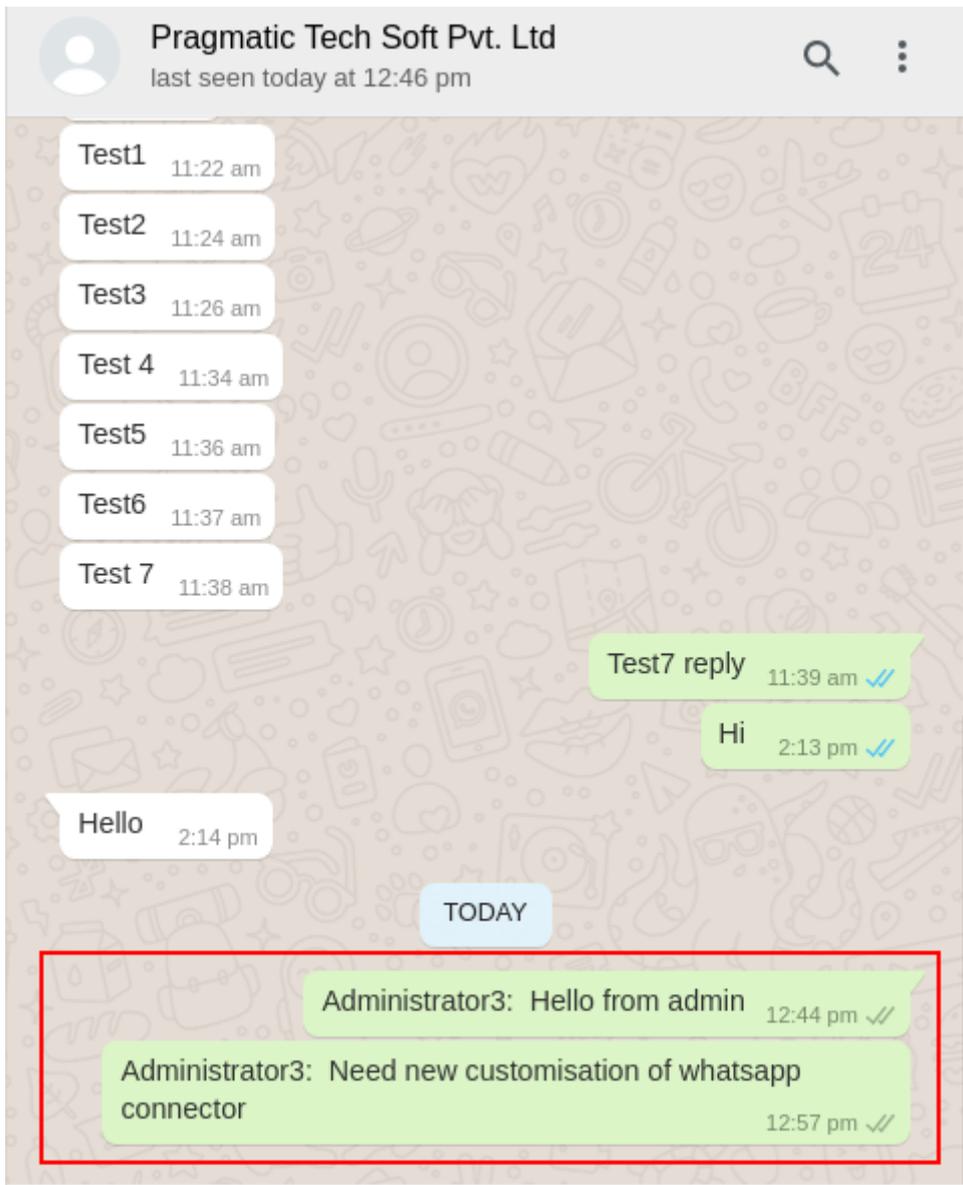
Administrator Administrator

Administrator - now
Hello from admin

Useful Links

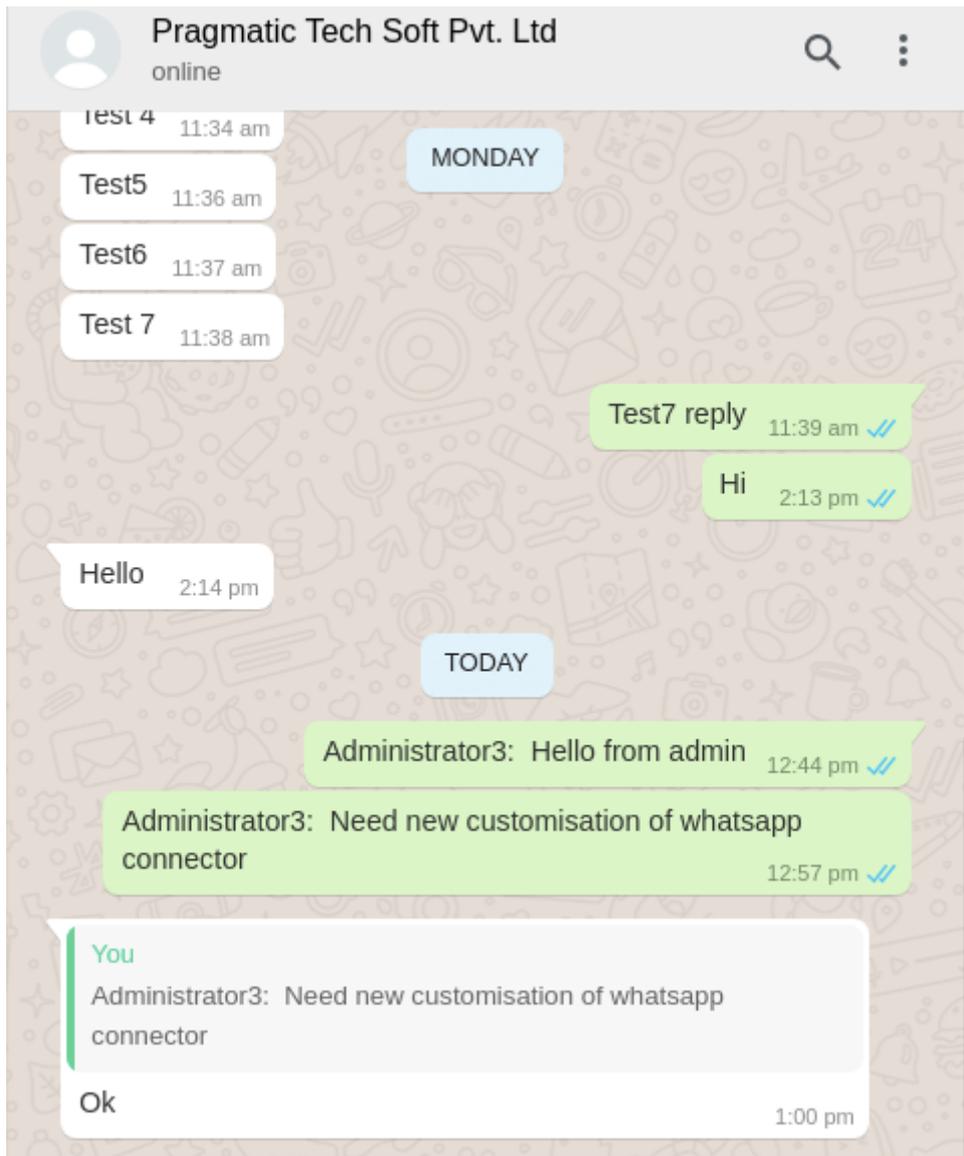
- Home
- About us
- Products
- Services
- Legal

Message In whatsapp application(screenshot) from odoobot as a login user.



If the user replies to the same message.

Message In whatsapp application(screenshot).



Message is received on the login user odoobot window.

The image shows a website dashboard interface. At the top, there is a purple navigation bar with the text "Website" and several menu items: "Pages", "Customize", "Promote", "Published" (with a toggle switch), "+ New", and "Edit". Below this is a white header area with a globe icon and the text "YOUR WEBSITE", a hamburger menu icon, and a "Contact Us" button. The main content area features a large heading "Welcome to your Homepage!" and a sub-heading "Click on Edit in the top right corner". A chat window is overlaid on the right side, titled "Administrator Administrator" with a close button. It contains three messages from "Administrator": "Hello from admin" (18 minutes ago), "Need new customisation of whatsapp connector" (5 minutes ago), and "Ok" (a minute ago). The "Ok" message is highlighted with a red border. In the bottom left corner, there is a dark grey sidebar with the heading "Useful Links" and a list of links: "Home", "About us", "Products", "Services", and "Legal".

Website Pages Customize Promote Published + New Edit

YOUR WEBSITE Contact Us

Welcome to your Homepage!

Click on Edit in the top right corner

Administrator Administrator

- Administrator - 18 minutes ago
Hello from admin
- Administrator - 5 minutes ago
Need new customisation of whatsapp connector
- Administrator - a minute ago
Ok

Useful Links

- Home
- About us
- Products
- Services
- Legal

b) Internal user:

Create an internal user.

Login from internal user.

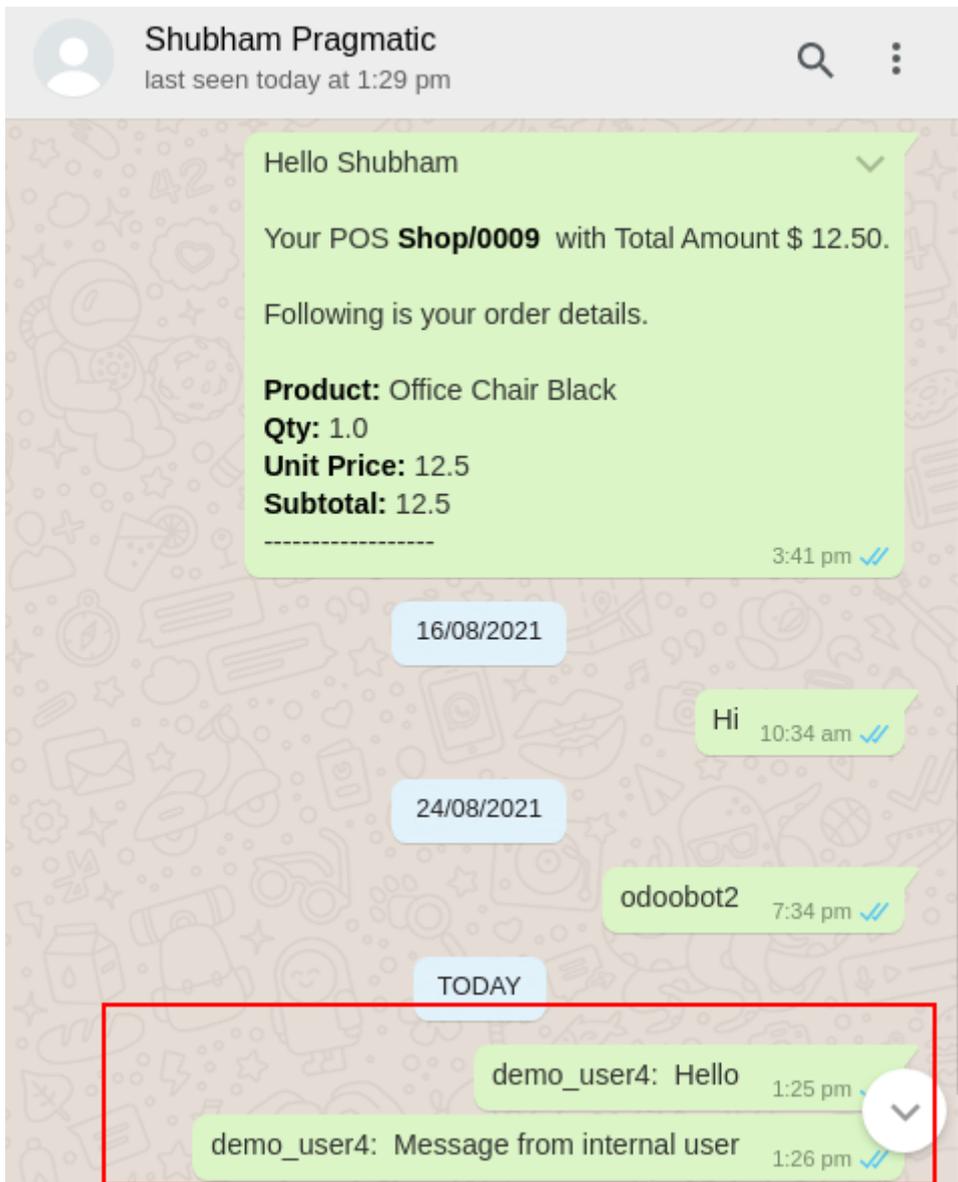
Goto website -> click on odoobot window & send message

Send a whatsapp message from a website using an internal user.

Messages are sent to operators' contacts which you have added in live chat.

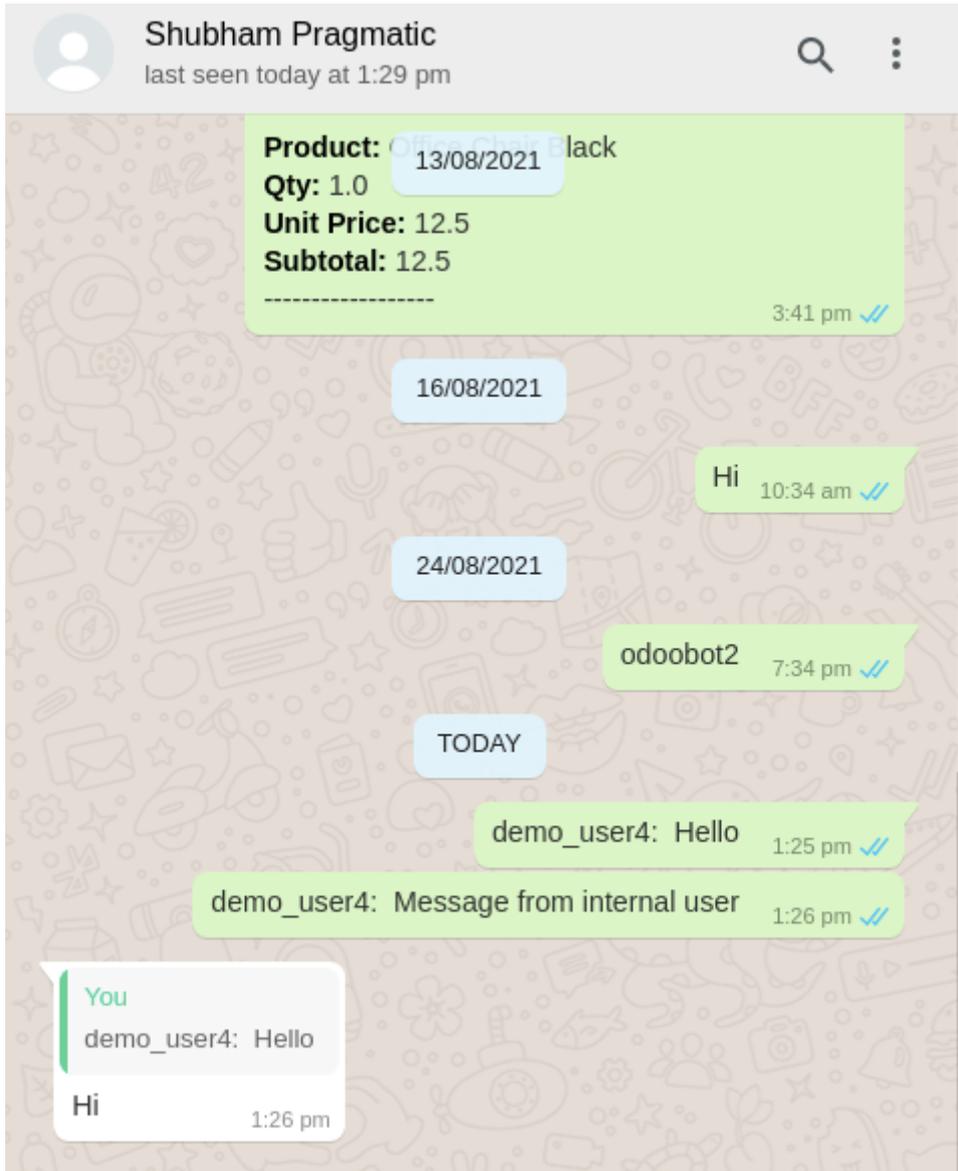
The screenshot displays a website interface with a live chat window. The chat window is titled "demo_user Administrator" and contains three messages: "Hello", "Message from internal user", and "Hi". A red arrow points to the chat window with the text "Send Messages". The website header includes "Website", "Pages", "Customize", "Promote", "Published", "+ New", and "Edit". The main content area says "Welcome to your Homepage!" and "Click on Edit in the top right corner". The footer has "Useful Links" with "Home", "About us", "Products", and "Services".

Message in whatsapp application(screenshot) from odoobot as an internal user.



If the user replies to the same message it will display in the respective user's odoobot window.

Message In whatsapp application(screenshot).



Message is received on the internal user odoobot window.

The image shows a website dashboard with a purple header bar. The header contains a grid icon, the word "Website", and navigation links: "Pages", "Customize", and "Promote". On the right side of the header, there is a "Published" status indicator (a green circle with a white checkmark), a mobile device icon, a "+ New" button, and an "Edit" button with a pencil icon. Below the header, the main content area has a "YOUR WEBSITE" logo on the left, a hamburger menu icon in the center, and a "Contact Us" button on the right. The main content area displays a "Welcome to your Homenage!" message and a sub-message "Click on Edit in the top right corner". A chat window is overlaid on the right side of the page, titled "demo_user Administrator". The chat window contains three messages: "Hello" (2 minutes ago), "Message from internal user" (2 minutes ago), and "Hi" (a minute ago). The "Hi" message is highlighted with a red border. In the bottom left corner, there is a dark grey sidebar with the heading "Useful Links" and a list of links: "Home", "About us", "Products", and "Services".

Website Pages Customize Promote Published + New Edit

YOUR WEBSITE Contact Us

Welcome to your **Homenage!**
Click on **Edit** in the top right corner

demo_user Administrator

- demo_user - 2 minutes ago
Hello
- demo_user - 2 minutes ago
Message from internal user
- demo_user - a minute ago
Hi

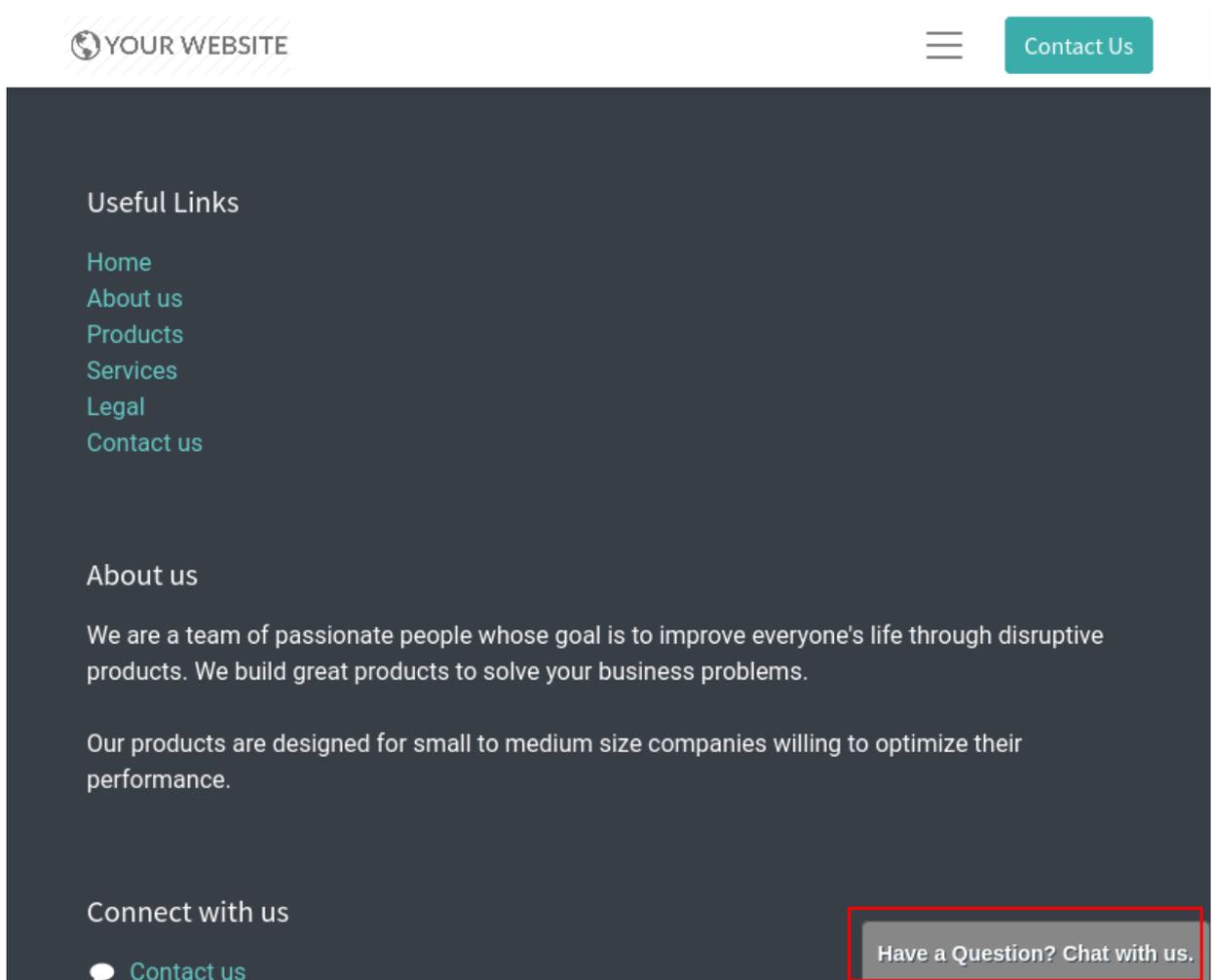
Useful Links

- Home
- About us
- Products
- Services

c) **Public user:**

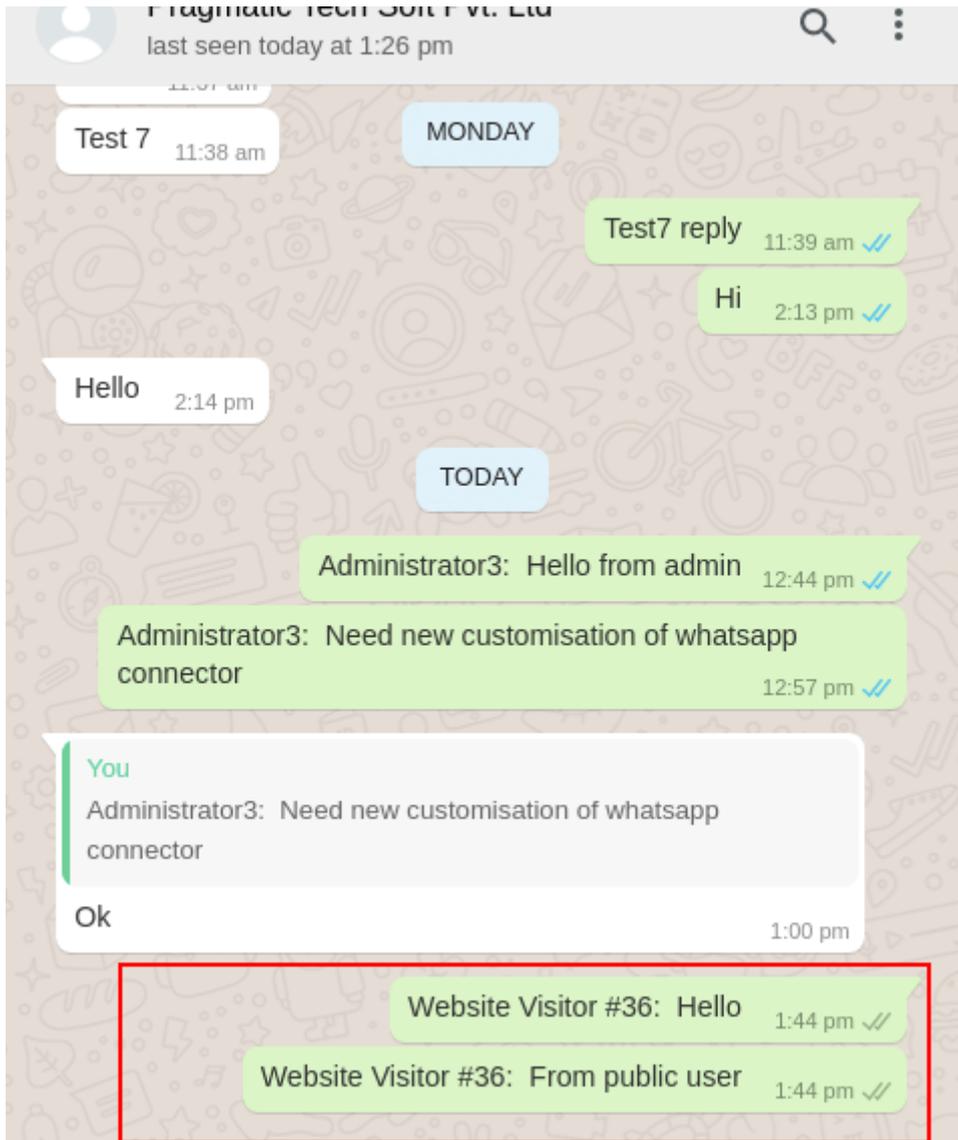
Goto signup page -> Showing odoobot window on bottom right corner

Click on the odoobot window.



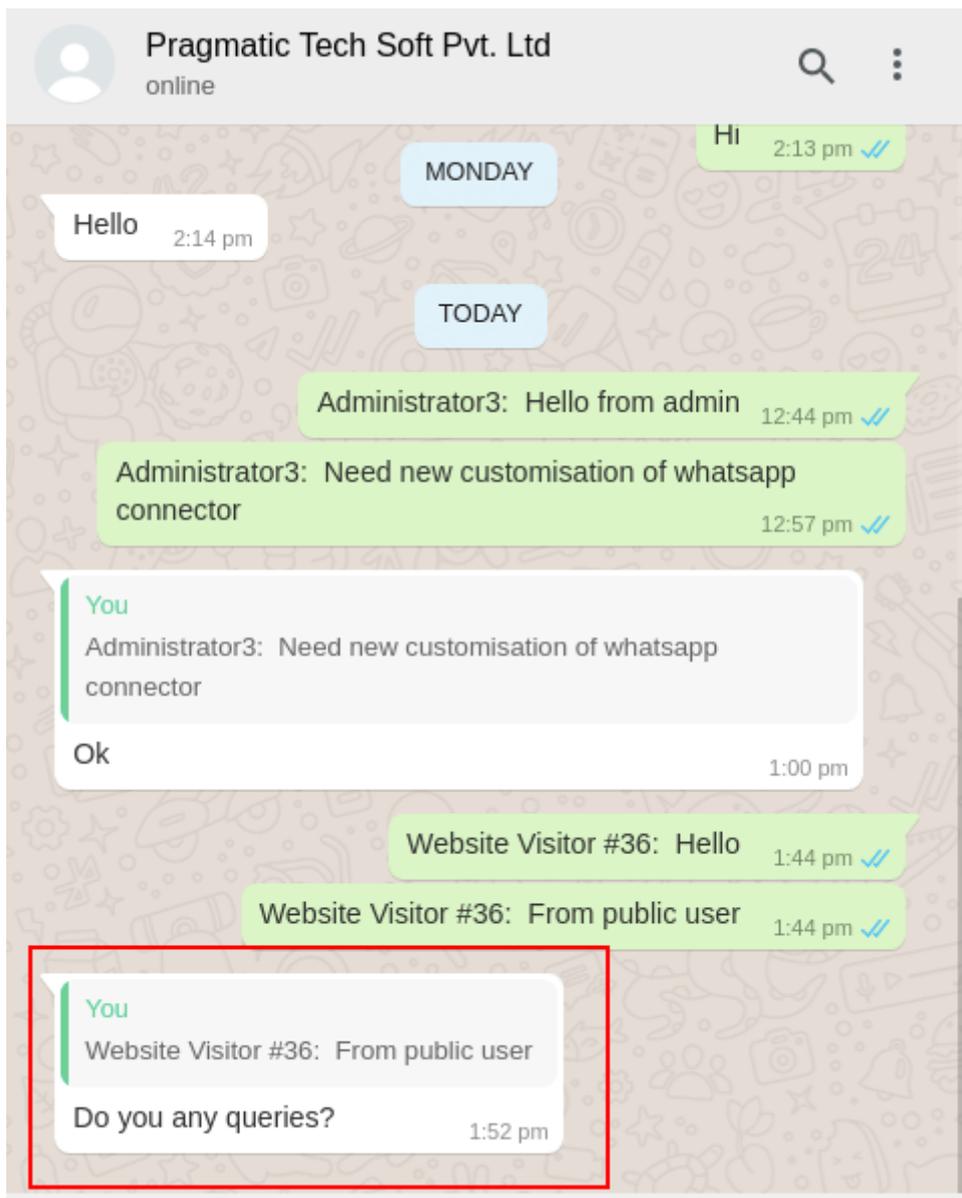
Send messages.

Messages are sent to operators.



If the operator replies to the same message.

Message In whatsapp application(screenshot).



Message in odoobot.

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About us

We are a team of passionate people whose goal is to improve your products. We build great products to solve your business problems.

Our products are designed for small to medium size companies to improve performance.

Connect with us

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Website Visitor #3 Administrator ✕

 **Administrator** - 10 minutes ago
Hello, how may I help you?

 **Visitor** - 10 minutes ago
From public user

 **Administrator** - 2 minutes ago
Do you any queries?