Document/PDF Merge & Mail

User Guide · Odoo 18.0 & 19.0

Batch personalised PDF/letter mail-merge from any recordset and a template

pokutsoft.com

1. Overview

Document / PDF Merge & Mail-Merge ==========

Stop exporting data to Word to run a mail-merge. This app lets you build a reusable letter/document template with placeholder tokens, point it at ANY Odoo recordset (partners, invoices, sale orders, employees, ...), and generate one rendered document per record in a single batch run.

Key features ---------- * Token-based templates ({{partner.name}}, {{record.amount_total}}, ...) with a safe expression evaluator (no arbitrary code execution). * Per-record rendering with fallbacks, default values and required-token checks. * Batch run object that tracks every generated line, its status and output. * Optional one-click email dispatch of the merged document to a partner field. * Merge any model selected from ir.model; field/token helper to discover paths. * HTML body that is rendered to a stored attachment per record.

Nothing native in Odoo does record-driven batched mail-merge with per-record email dispatch. This module is pure format-generation; it sends through Odoo's own mail layer (BYO SMTP).

2. Installation

Open Apps, click Update Apps List, search for “Document/PDF Merge & Mail” (technical name **gb_document_pdf_merge_mail_merge**) and press Install. The module supports Odoo 18.0 and 19.0, Community and Enterprise.

3. Menus & Navigation

After install the following menus become available:

- Mail-Merge
- Merge Runs
- Templates
- Schedules
- Run Mail-Merge

4. Feature & Data-Model Reference

The app implements the following records and engines:

Model	Purpose
gb.merge.run	Document Merge Run
gb.merge.template	Document/PDF Merge Template
gb.merge.schedule	Recurring Mail-Merge Schedule
gb.merge.run.line	Document Merge Run Line
gb.merge.run.wizard	Create a Merge Run from selected records

5. Typical Workflow

1. Open the app's Configuration menu and set up the master data / policies it needs.
2. Create the main operational record from its primary menu.
3. Use the action buttons on the form (e.g. Confirm / Compute / Post / Generate) to run the engine.
4. Review the results in the list, pivot and report views; export or post where applicable.

6. Support

Email **support@pokutsoft.com** or visit **https://pokutsoft.com**. Please include your Odoo version (18.0 / 19.0) and the module technical name.