Shared Team Inbox / Conve

User Guide · Odoo 18.0 & 19.0

Assign inbound emails to agents with status, SLA tracking and collision detection

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1. Overview

Shared Team Inbox / Conversation Assignment
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Turn a chaotic shared mailbox into an organised, accountable workflow. Inbound emails become conversations that are routed to a team, assigned to an agent, tracked through a status pipeline, measured against an SLA policy, and protected by collision detection so two agents never reply to the same email at once.

Key features ---------- * Teams with members, mail alias and round-robin / least-loaded routing. * Conversations with a status pipeline (new, open, pending, resolved, closed) and priority. * SLA policies (first-response & resolution targets by priority) with automatic deadline computation and breach detection. * Collision detection: a viewing/typing lock warns agents when a colleague already has the conversation open. * Canned replies for fast, consistent answers. * Inbound email handling via mail alias + message threading. * Reassignment wizard and bulk routing. * Agent workload and SLA dashboards.

Complements helpdesk for non-ticket shared email such as info@ / sales@ / accounts@ mailboxes.

2. Installation

Open Apps, click Update Apps List, search for “Shared Team Inbox / Conve” (technical name **gb_shared_team_inbox_conversation_assignm**) 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:

- Team Inbox
- My Conversations
- All Conversations
- Teams
- Configuration
- SLA Policies
- Canned Replies

4. Feature & Data-Model Reference

The app implements the following records and engines:

Model	Purpose
gb.inbox.canned.reply	Shared Inbox Canned Reply
gb.inbox.conversation	Shared Inbox Conversation
gb.inbox.sla	Shared Inbox SLA Policy
gb.inbox.team	Shared Inbox Team
gb.inbox.assign.wizard	Bulk Assign / Route Conversations

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.