# Transactional Email Templates & Branding

User Guide

Odoo 18 / 19 Community & Enterprise

Email / Comms & Marketing

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## Technical reference

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|---|---|
| **Technical name** | gb_transactional_email_templates_branding |
| **Version** | 18.0.1.0.0 |
| **Odoo series** | 18.0 and 19.0 |
| **Category** | Email / Comms & Marketing |
| **Depends on** | mail |
| **Licence** | LGPL-3 |
| **Data models** | gb.email.brand.profile, gb.email.layout.theme, gb.email.template.binding, gb.email.ten |

# 1. Overview

Odoo's default transactional emails - order confirmations, invoices, portal invites - are functional but plain. This app lets you wrap any mail template in a branded, themeable, multilingual layout without touching QWeb or writing HTML.

You build a reusable brand profile (logo, colours, typography, footer, social links) once, pick a layout theme, and bind them to your existing mail templates. A live preview renders the final email with sample data so you can iterate without sending test mail.

## Who is it for?

- Marketing and operations teams who want consistent, on-brand emails.
- Agencies managing several Odoo databases with different brands.
- Anyone who finds native mail-template editing clunky.

# 2. Installation

The module installs like any standard Odoo app. You need the Administration / Settings access right to install apps.

- Enable developer mode is not required for normal use.
- Open Apps from the main menu.
- Click Update Apps List (top menu) so Odoo re-reads the addons folder.
- Remove the default Apps filter and search for "Transactional Email Templ" (technical name **gb_transactional_email_templates_branding**).
- Click Install. The dependencies (mail) are installed automatically.

After installation a new top-level menu becomes available (see Configuration below). On a multi-company database, install once; the records are company-aware where the underlying models are.

# 3. Configuration

Open the Email Branding top menu. It contains Branded Templates, Brand Profiles and Layout Themes.

Create a record under Brand Profiles: set the logo, primary and secondary Colours, Typography (font), Content (footer text and legal/address block) and Social Links.

Under Layout Themes choose a header banner, hero, card or plain style. The theme is compiled to inline HTML so it survives email clients.

The app depends only on Odoo's core mail module - no external service is contacted.

# 4. Step-by-step Walkthrough

The flow below uses the real menus, buttons and statuses shipped with the module. Labels are quoted exactly as they appear in the interface.

## 4.1 Create a brand profile

1. Go to Email Branding > Brand Profiles and create a record.
2. Fill the Colours, Typography, Content and Social Links tabs.
3. Save. This profile can now be reused across many templates.

## 4.2 Bind a theme + brand to a mail template

1. Open Branded Templates and create a binding, choosing the target mail template, a brand profile and a layout theme.
2. Use the Hero and Advanced tabs to fine-tune.
3. Click Toggle Branding to switch the wrapping on for that template.

## 4.3 Add per-language overrides

1. On the binding open the Language Overrides tab.
2. Add a subject and body override per language so customers receive the email in their own language.

## 4.4 Preview before going live

1. Click Preview to open the preview wizard.
2. The Last Preview renders the final HTML with a sample record and lets you send a test message.
3. Use the Audit action to review which templates are branded.

# 5. Feature Reference

Every feature below is implemented in the module; the model behind each one is named in brackets so administrators can locate it.

## Brand profiles

Logo, primary/secondary colours, font, button style, footer text, social media links and legal/address block, reusable across templates (model gb.email.brand.profile).

## Layout themes

Header banner, hero, card or plain layouts compiled to inline HTML that survives email clients (gb.email.layout.theme).

## Template bindings

Bind a theme and brand to any Odoo mail template and toggle the branded wrapping with one click (gb.email.template.binding).

## Per-language overrides

Subject and body overrides per language so each recipient gets their own language (gb.email.template.translation).

## Live preview & send-test

Render the final email against a sample record and send a test, without affecting real customers (gb.email.preview.wizard).

# 6. Tips, Troubleshooting & FAQ

### Q: Do I need to know HTML or QWeb?

A: No. The brand profile and theme are configured with form fields; the HTML is generated for you.

### Q: Will branded emails break in Outlook/Gmail?

A: Themes are compiled to inline HTML specifically so they survive common email clients.

### Q: Does it send data to an external service?

A: No. Everything runs inside Odoo's own mail engine.

### Q: Can I keep some templates plain?

A: Yes - branding is applied per binding via Toggle Branding, so unbound templates stay untouched.

### Q: How do I test without spamming customers?

A: Use the Preview wizard's send-test against your own address.

### Q: Can two brands share one database?

A: Yes - create one brand profile per brand and bind the right one to each template.

# 7. Support

We are happy to help you get the most out of this app.

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|---|---|
| **Email** | support@pokutsoft.com |
| **Catalogue** | https://pokutsoft.com |
| **Author** | Pokutsoft |
| **Licence** | LGPL-3 |
| **Supported** | Odoo 18.0 and 19.0 |

When reporting an issue please include your Odoo version, the module version (18.0.1.0.0), the menu/screen you were on and the exact error text. This module performs all processing inside your Odoo instance unless an external connector is explicitly configured by you.