WhatsApp / SMS Notification Gateway

Transactional WhatsApp & SMS alerts via your own Twilio/Meta keys (BYOK)

User Guide · Odoo 18 / 19 Community
Category: Integrations / BYOK Connectors
Technical name: gb_whatsapp_sms_notification_gateway
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This guide documents only features implemented in the module. Menu paths, field names and button labels match the application exactly.

1. Overview

WhatsApp / SMS Notification Gateway sends transactional alerts — order, invoice and ticket updates — over SMS and WhatsApp using your own Twilio or Meta keys (BYOK). You define a gateway, message templates with placeholders, and trigger rules that fire when a record reaches a chosen value.

Customers increasingly expect SMS and WhatsApp updates. This module is a generic BYOK transactional gateway: it queues, sends and logs messages, masks phone numbers in the log, and retries failures.

Who it is for

- Businesses sending order/invoice/ticket alerts to customers.
- Teams with their own Twilio or Meta WhatsApp accounts.
- Anyone needing generic transactional SMS/WhatsApp from Odoo.

Key capabilities at a glance

- Gateways — Twilio SMS/WhatsApp, Meta WhatsApp Cloud or generic HTTP, with default and test mode.
- Templates — Per-channel body with placeholders, model link, language field and preview.
- Triggers — Fire a template when a model field reaches a value, with partner/phone mapping and once-per-record.
- Manual send — Wizard to send or queue an ad-hoc SMS/WhatsApp to a contact.
- Message log — State, attempts, provider message ID, error and masked number; reset/cancel.
- BYOK — Uses your own Twilio/Meta credentials — no bundled messaging service.

2. Installation

Install from the Odoo Apps menu with Administrator access; dependencies are pulled in automatically.

1. Open Apps from the main Odoo menu.
2. Click Update Apps List to refresh the catalogue.
3. Search for “WhatsApp / SMS Notification”.
4. Click Install on the matching card.
5. The Notifications menu appears once installation finishes.

Technical name	gb_whatsapp_sms_notification_gateway
Depends on	base, mail
Odoo versions	18.0 and 19.0
Licence	LGPL-3

3. Configuration

Set up a Gateway and Templates under Notifications ▸ Configuration.

Gateways (BYOK)

- Create a gateway with a provider: Twilio SMS, Twilio WhatsApp, Meta WhatsApp Cloud or Generic HTTP.
- Set the channel (SMS/WhatsApp), account SID, auth token, from-number/endpoint and a test-mode flag.
- Mark one gateway as default.

Templates

- Create templates per channel with a body containing placeholders and a placeholder hint.
- Link a template to a model and an optional language field; Preview renders it.

Triggers

- Define trigger rules: when a model's field reaches a value, fire a template via a gateway.
- Map the partner and phone fields and set once-per-record to avoid duplicates.

4. Step-by-Step Usage

Messages flow Draft ▸ Queued ▸ Sent (or Failed); triggers create them automatically.

Send manually

1. Use the Send Notification wizard, pick a partner, gateway and template (or type a body) and a number.
2. Send now or queue it; the message is created with the phone number masked in the log.

Automate with triggers

1. Activate a trigger; when a record hits the configured value the message is generated and sent.
2. Test Fire a trigger to confirm it produces the right message.
3. Once-per-record stops the same record alerting twice.

Monitor delivery

1. Open Messages to see state, attempts, provider message ID and any error.
2. Failed messages can be Reset and re-sent; cancelled messages stay logged.

5. Feature Reference

Each row corresponds to a real menu, model or wizard in the module.

Gateways	Twilio SMS/WhatsApp, Meta WhatsApp Cloud or generic HTTP, with default and test mode.
Templates	Per-channel body with placeholders, model link, language field and preview.
Triggers	Fire a template when a model field reaches a value, with partner/phone mapping and once-per-record.
Manual send	Wizard to send or queue an ad-hoc SMS/WhatsApp to a contact.
Message log	State, attempts, provider message ID, error and masked number; reset/cancel.
BYOK	Uses your own Twilio/Meta credentials — no bundled messaging service.

6. Tips, Troubleshooting & FAQ

Q. Which providers are supported?
A. Twilio SMS, Twilio WhatsApp, Meta WhatsApp Cloud and a generic HTTP endpoint, all BYOK.

Q. How do triggers fire?
A. A trigger watches a model field; when it reaches the configured value the mapped template is sent via the gateway.

Q. Will a record be messaged twice?

A. Enable once-per-record on the trigger to prevent duplicate alerts for the same record.

Q. Are phone numbers protected in the log?
A. Yes, the outbound message stores a masked version of the number alongside the full target.

Q. What happens to a failed message?
A. It is logged with the error and attempt count and can be reset and re-sent.

Q. Can I test a template before going live?
A. Yes, preview the template and use Test Fire on a trigger to confirm the output.

7. Support

We are happy to help with installation, configuration and usage questions.

Email	support@pokutsoft.com
Apps & catalogue	https://pokutsoft.com
Module	WhatsApp / SMS Notification Gateway (v18.0 / v19.0)

When contacting support, please include your Odoo version, the module version and a short description of the steps that led to the issue.