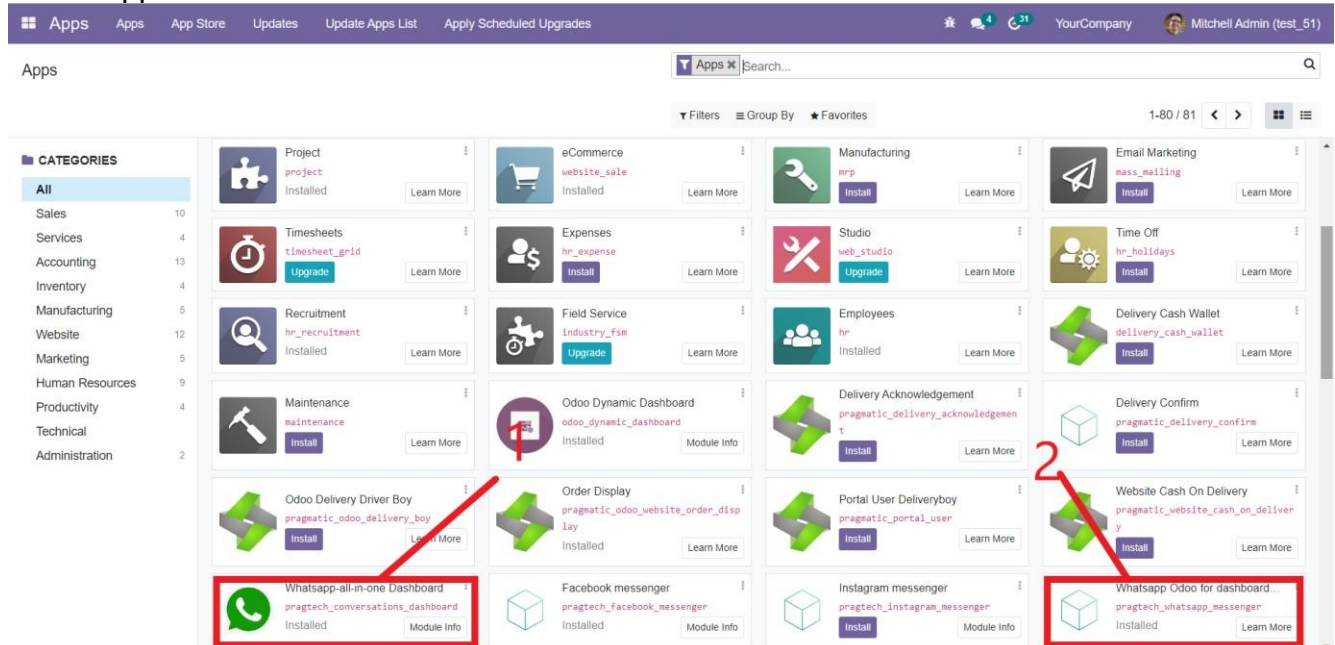


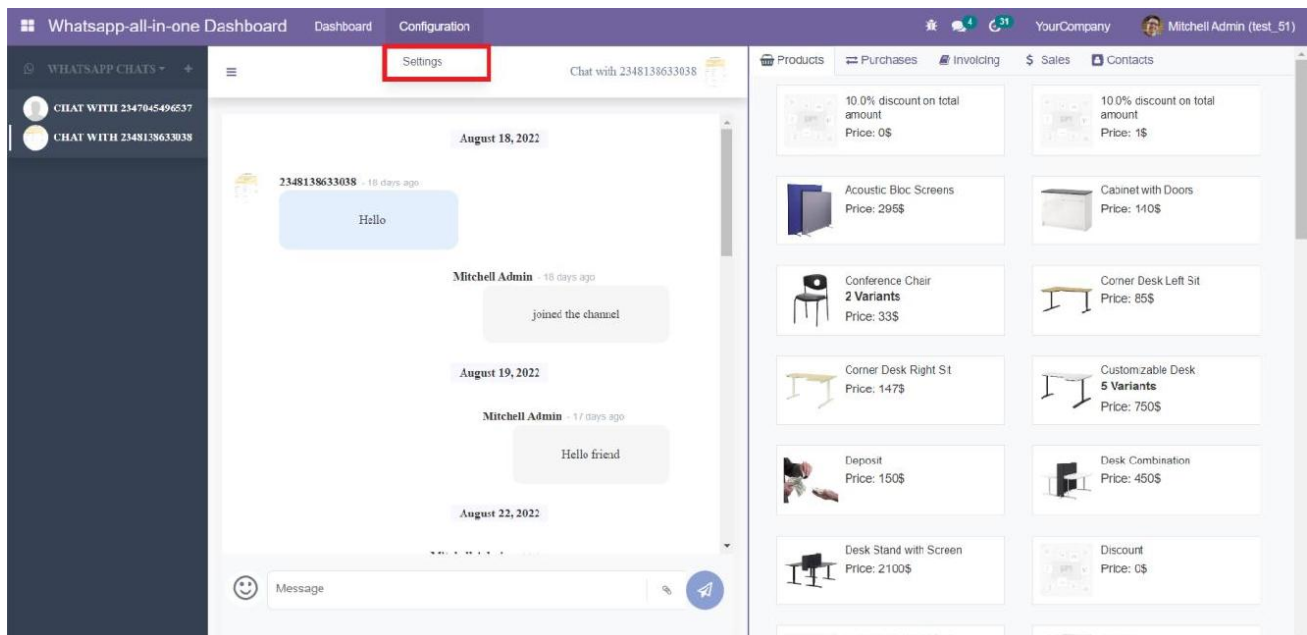
Whatsapp-all-in-one Dashboard

Whatsapp-all-in-one dashboard is the user interface used to manage chats from the pragtech messenger modules for whatsapp and also send information from odoo base modules like sales, invoicing, purchases, contacts and products.

Step 1: Install the Whatsappall-in-one dashboard first then install the pragtech whatsapp module.



Step 2: You can access the configuration for whatsapp module installed by navigating to Configuration > Settings



Step 3: Choose your preferred api service provider. Enter Both the Endpoint and the token of your chat-api instance in the DashboardSettings or Enter the Phone Number ID. Page Access token and webhook verify token for your Whatsapp meta instance.

Whatsapp-all-in-one Dashboard

Dashboard

Configuration

6

27

My Company (San Francisco)

Mitchell Admin (test_69)

Settings

Search...

SAVE DISCARD Unsaved changes

General Settings

CRM

Sales

Conversations

Website

eLearning

Purchase

Inventory

Invoicing

Project

Email Marketing

Events

Employees

Point of Sale

Whatsapp Chat-api Integration

Use chat api ☒

Whatsapp Endpoint

Whatsapp Token

GET QR CODE

Whatsapp Meta Integration

Use meta api ☐

Whatsapp-all-in-one Dashboard

Dashboard

Configuration

6

27

My Company (San Francisco)

Mitchell Admin (test_69)

Settings

Search...

SAVE DISCARD Unsaved changes

General Settings

CRM

Sales

Conversations

Website

eLearning

Purchase

Inventory

Invoicing

Project

Email Marketing

Events

Employees

Point of Sale

Whatsapp Chat-api Integration

Use chat api ☐

Whatsapp Meta Integration

Use meta api ☒

Whatsapp Phone number

Whatsapp meta Token

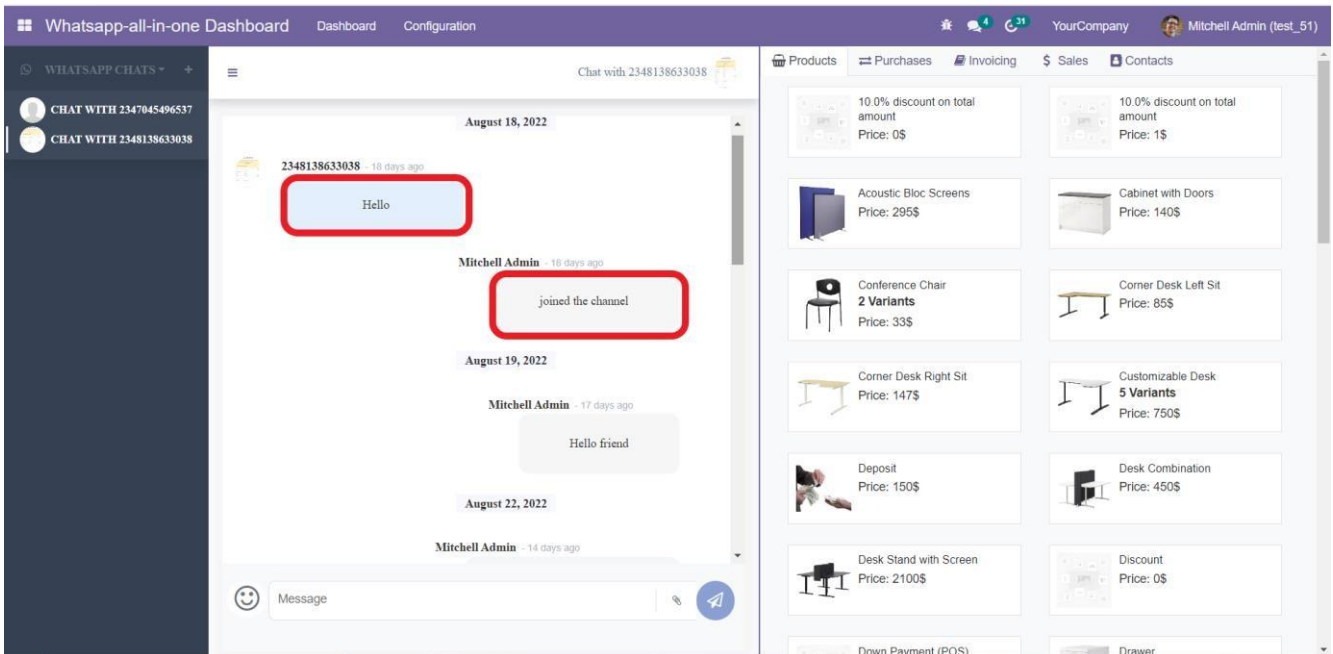
Webhook verify token

verify webhook ☐

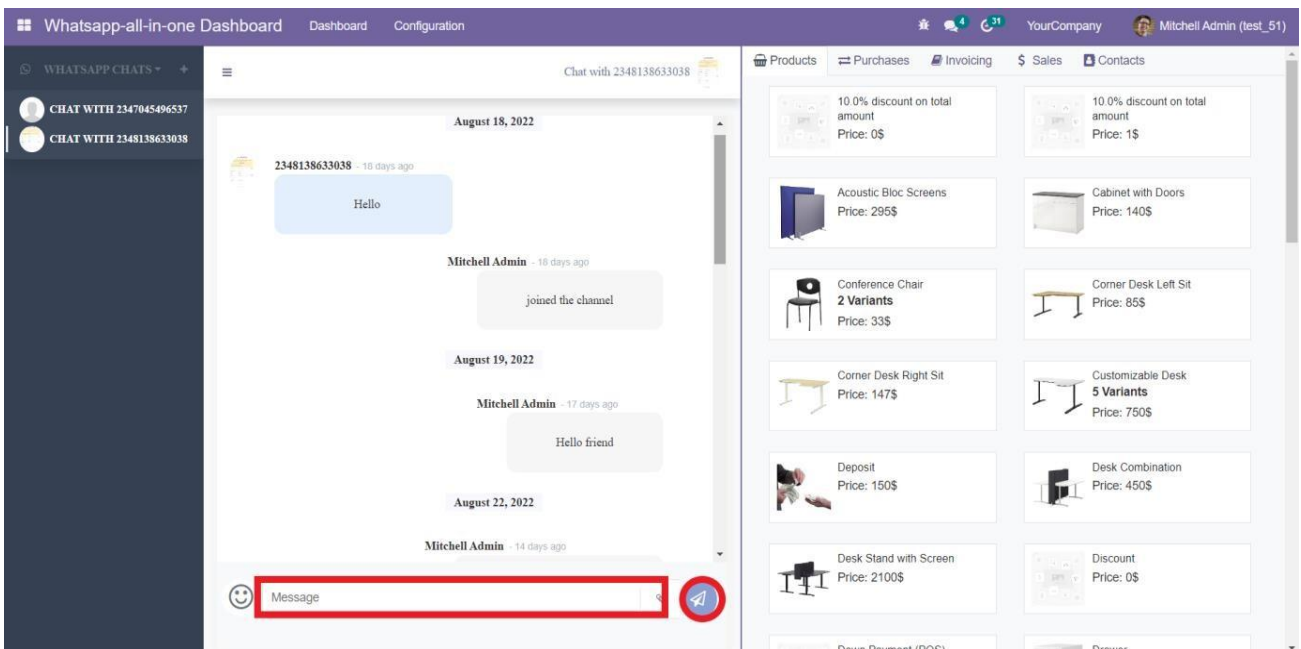
Note: The use of Whatsapp meta api requires a webhook verification from the facebook developer account. As such, there are two fields in settings necessary for webhook verification, these are the webhook verify token field which you can use to set the token to be used by facebook to verify your odoo system and the webhook verify check box which is to be checked before you begin a webhook verification and unchecked after the webhook verify is completed.

Step 4: Open the Whatsapp dashboard. The left section is for chats, while the right side shows data from other modules within odoo. On the chat section, select a chat type. choose a chat to open it in the chat window.

Step 5: In the chat thread you can see the received messages at the left side colored in blue, while the sent messages are at the right and colored in grey



Step 6: In the chat thread you can send messages created in the composer below the screen by clicking the button with the plane icon or simply pressing enter key.



Step 7: You can access the records for sales, inventory (products), purchase, contacts and invoicing modules by the navigation tabs at the right side of the dashboard.

The screenshot shows the 'Whatsapp-all-in-one Dashboard' interface. On the right side, there are five navigation tabs: 'Products', 'Purchases', 'Invoicing', 'Sales', and 'Contacts'. These tabs are numbered 1 through 5 with red arrows. The 'Products' tab is currently selected, displaying a list of products with columns: Number, Creation Date, Customer, Salesperson, Total, Report, and a status icon. The chat window on the left shows a conversation with '2348138633038' dated August 18, 2022, with messages from 'Hello' and 'joined the channel'.

Number	Creation Date	Customer	Salesperson	Total	Report	Status
S00032	2022-07-26 00:16	Gemini Fu...	Marc Demo	25\$		✓
S00029	2022-07-26 00:16	Gemini Fu...	Marc Demo	66\$		✓
S00027	2022-07-26 00:16	Gemini Fu...	Marc Demo	1799\$		✓
S00015	2022-07-26 00:16	Gemini Fu...	Marc Demo	1186.5€		✓
S00013	2022-07-26 00:16	Gemini Fu...	Marc Demo	1582€		✓
S00012	2022-07-26 00:16	Gemini Fu...	Marc Demo	415.5€		✓
S00011	2022-07-26 00:16	Gemini Fu...	Marc Demo	556€		✓
S00009	2022-07-26 00:16	Gemini Fu...	Marc Demo	751€		✓
Test/001	2022-07-26 00:16	Gemini Fu...	Marc Demo	462€		✓
S00007	2022-07-26 00:16	Gemini Fu...	Mitchell Admin	1535.4€		✓
S00006	2022-07-26 00:16	Lumber Inc	Mitchell Admin	750€		✓
S00004	2022-07-26 00:16	Gemini Fu...	Mitchell Admin	2240€		✓
S00003	2022-07-26 00:16	Ready Mat	Mitchell Admin	377.5€		✓
S00031	2022-07-26 00:16	Gemini Fu...	Marc Demo	1799\$		✓
S00030	2022-07-26 00:16	Gemini Fu...	Marc Demo	47\$		✓
S00028	2022-07-26 00:16	Gemini Fu...	Marc Demo	415.5\$		✓
S00026	2022-07-18 00:16	Gemini Fu...	Marc Demo	1349\$		✓
S00025	2022-07-18 00:16	Gemini Fu...	Marc Demo	1599\$		✓
S00024	2022-07-18 00:16	Gemini Fu...	Marc Demo	1047\$		✓

Step 8: List views are used for sales, invoicing and purchases, while kanban views are used for products and contacts. Drag and drop functionality enables you to put details about a record directly into the composer.

This screenshot is identical to the one in Step 7, showing the 'Whatsapp-all-in-one Dashboard' with the 'Products' tab selected. The navigation tabs are still numbered 1 through 5. The chat window on the left remains the same, showing a conversation with '2348138633038'.

Step 9: The report links to the sales, invoicing and purchases record are also sent as part of the record details.

The screenshot displays the 'Whatsapp-all-in-one Dashboard' with a chat window on the left and a table of sales records on the right.

Chat Window:

- Header: Chat with 2348138633038
- Message 1: Hello Josh
- Date: September 2, 2022
- Message 2: S00027 2022-07-26 00:16:41 Gemini Furniture Marc Demo 1799\$ Report: http://localhost:8079/report/pdf/sale.report_saleorder/28
- Message 3: INV/2022/00003 2022-07-08 Deco Addict 30 Days \$22137.5 Report: http://localhost:8079/report/pdf/account.report_invoice_with_payments/3
- Message 4: S00032 2022-07-26 00:16:41 Gemini Furniture Marc Demo 25\$ Report: http://localhost:8079/report/pdf/sale.report_saleorder/33

Sales Table:

Number	Creation Date	Customer	Salesperson	Total	Report
S00032	2022-07-26 00:16:41	Gemini Fu...	Marc Demo	25\$	Report
S00029	2022-07-26 00:16:41	Gemini Fu...	Marc Demo	66\$	Report
S00027	2022-07-26 00:16:41	Gemini Fu...	Marc Demo	1799\$	Report
S00015	2022-07-26 00:16:41	Gemini Fu...	Marc Demo	1186.5€	Report
S00013	2022-07-26 00:16:41	Gemini Fu...	Marc Demo	1582€	Report
S00012	2022-07-26 00:16:41	Gemini Fu...	Marc Demo	415.5€	Report
S00011	2022-07-26 00:16:41	Gemini Fu...	Marc Demo	556€	Report
S00009	2022-07-26 00:16:41	Gemini Fu...	Marc Demo	751€	Report
Test/001	2022-07-26 00:16:41	Gemini Fu...	Marc Demo	462€	Report
S00007	2022-07-26 00:16:41	Gemini Fu...	Mitchell Admin	1535.4€	Report
S00006	2022-07-26 00:16:41	Lumber Inc	Mitchell Admin	750€	Report
S00004	2022-07-26 00:16:41	Gemini Fu...	Mitchell Admin	2240€	Report
S00003	2022-07-26 00:16:41	Ready Mat	Mitchell Admin	377.5€	Report
S00031	2022-07-26 00:16:41	Gemini Fu...	Marc Demo	1799\$	Report
S00030	2022-07-26 00:16:41	Gemini Fu...	Marc Demo	47\$	Report
S00028	2022-07-26 00:16:41	Gemini Fu...	Marc Demo	415.5\$	Report
S00026	2022-07-18 00:16:41	Gemini Fu...	Marc Demo	1349\$	Report
S00025	2022-07-18 00:16:41	Gemini Fu...	Marc Demo	1599\$	Report
S00024	2022-07-18 00:16:41	Gemini Fu...	Marc Demo	1047\$	Report

Step 10: For the kanban views you can drag the record image or the record details as shown below.

The screenshot displays the 'Whatsapp-all-in-one Dashboard' with a chat window on the left and a Kanban view of products on the right.

Chat Window:

- Header: Chat with 2348138633038
- Message 1: Hello Josh
- Date: September 2, 2022
- Message 2: S00027 2022-07-26 00:16:41 Gemini Furniture Marc Demo 1799\$ Report: http://localhost:8079/report/pdf/sale.report_saleorder/28
- Message 3: INV/2022/00003 2022-07-08 Deco Addict 30 Days \$22137.5 Report: http://localhost:8079/report/pdf/account.report_invoice_with_payments/3
- Message 4: Acoustic Bloc Screens Price: 295\$

Kanban View:

- 10.0% discount on total amount Price: 0\$
- 10.0% discount on total amount Price: 1\$
- Acoustic Bloc Screens Price: 295\$
- Cabinet with Doors Price: 140\$
- Conference Chair 2 Variants Price: 33\$
- Corner Desk Left Sit Price: 85\$
- Corner Desk Right Sit Price: 147\$
- Customizable Desk 5 Variants Price: 750\$
- Deposit Price: 150\$
- Desk Combination Price: 450\$
- Desk Stand with Screen Price: 2100\$
- Discount Price: 0\$
- Down Payment (POS)
- Drawer

Whatsapp-all-in-one Dashboard

DashboardConfiguration

531YourCompanyMitchell Admin (test_51)

WHATSAPP CHATS

Chat with 2348138633038

Mitchell Admin - 6 days ago

Hello Josh

September 2, 2022

Mitchell Admin - 4 days ago

S00027 2022-07-26 00:16:41 Gemini Furniture
Mare Demo 1799\$ Report:
[http://localhost:8079/report/pdf/sale.report_saleor
der/28](http://localhost:8079/report/pdf/sale.report_saleor
der/28)

Mitchell Admin - 4 days ago

INV/2022/00003 2022-07-08 Deco Addict 30
Days \$22137.5 Report:
[http://localhost:8079/report/pdf/account.report_in
voice_with_payments/3](http://localhost:8079/report/pdf/account.report_in
voice_with_payments/3)

Message

Acoustic Bloc Screens
Price: 295\$

Products

PurchasesInvoicingSalesContacts

10.0% discount on total amount
Price: 0\$

10.0% discount on total amount
Price: 1\$

Acoustic Bloc Screens
Price: 295\$

Cabinet with Doors
Price: 140\$

Conference Chair
2 Variants
Price: 33\$

Corner Desk Left Sit
Price: 85\$

Corner Desk Right Sit
Price: 147\$

Customizable Desk
5 Variants
Price: 750\$

Deposit
Price: 150\$

Desk Combination
Price: 450\$

Desk Stand with Screen
Price: 2100\$

Discount
Price: 0\$

Down Payment (POS)

Drawer

Whatsapp-all-in-one Dashboard

DashboardConfiguration

531YourCompanyMitchell Admin (test_51)

WHATSAPP CHATS

Chat with 2348138633038

Mitchell Admin - 6 days ago

Hello Josh

September 2, 2022


Mitchell Admin - 4 days ago

S00027 2022-07-26 00:16:41 Gemini Furniture
Mare Demo 1799\$ Report:
[http://localhost:8079/report/pdf/sale.report_saleor
der/28](http://localhost:8079/report/pdf/sale.report_saleor
der/28)

Mitchell Admin - 4 days ago

INV/2022/00003 2022-07-08 Deco Addict 30
Days \$22137.5 Report:
[http://localhost:8079/report/pdf/account.report_in
voice_with_payments/3](http://localhost:8079/report/pdf/account.report_in
voice_with_payments/3)

Acoustic Bloc Screens
Price: 295\$



Products

PurchasesInvoicingSalesContacts

10.0% discount on total amount
Price: 0\$

10.0% discount on total amount
Price: 1\$

Acoustic Bloc Screens
Price: 295\$

Cabinet with Doors
Price: 140\$

Conference Chair
2 Variants
Price: 33\$

Corner Desk Left Sit
Price: 85\$

Corner Desk Right Sit
Price: 147\$

Customizable Desk
5 Variants
Price: 750\$

Deposit
Price: 150\$

Desk Combination
Price: 450\$

Desk Stand with Screen
Price: 2100\$

Discount
Price: 0\$

Down Payment (POS)

Drawer