Odoo Email Notifications

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# Purpose

The purpose of this document is to provide a starting point to build out the email notifications in Odoo for the Helpdesk and Field Service processes. The built-in stage emails don’t quite satisfy Pavlov’s needs for more precise communication with both our customers and our technicians. Because of this, the scenarios below include specific details on when they get triggered and to whom.

NOTE: Although I provided an Email Template name, these aren’t set in stone and can be changed to something easier to follow if these don’t quite work for naming schemes.

# Field Services

## Field Service Order Created (Outage Recipients)

What: We email property staff and sometimes ownership for site and building related issues.

When:

* FS Order Confirmed
* Scope = Site OR Building(s)
* Ticket Type = Site Issue OR Building(s) Issue

To: All Contacts on Active Relationship Record type ‘Receives Outage Notifications From’, related to the FSM Location.

Email Template Name: Site/Building Issue FS Order Created Email

## Order Worker Request (Workers)

What: We send emails to all the requested order to let them know an order is up for grabs.

When:

* FS Order moved to Requested stage
* Request Workers (person\_ids) contains entries

To: All in Request Workers (person\_ids) field

Email Template Name: FS Order Requested Email

## Order Assigned (Workers)

What: The assigned worker needs to know they have been assigned an order. This should probably have a delay, in case the dispatcher is moving through the assigned stage directly to the scheduled stage, therefore not needing to send an email for this stage in that scenario. If it isn’t moved to scheduled, then that means we send out an ‘ETA Needed’ email stating we need an ETA.

When:

* FS Order moved to Assigned stage
* Assigned To (person\_id) contains data

To: Assigned Tech

Email Template Name: FS Order Assigned Email

## Order Assigned ETA Needed Repeating (Workers)

What: Sometimes we want to pester a tech to provide an ETA, if we have it assigned but still waiting on scheduling, we want to send a repeating email on an interval depending on the priority. For example higher priority orders will have a shorter timeframe for the email to be sent.

When:

* FS Order moved to Assigned stage
* Runs on interval depending on priority
  + Urgent: Every hour
  + High: Every 2 hours
  + Low: Every 8 hours
  + Normal: Every 24 hours
* Assigned To (person\_id) contains data

To: Assigned Tech

Email Template Name: FS Order Assigned – ETA Needed Followup Email

## Order Assigned to someone else

What: If there are requested workers that weren’t assigned the order, they need to be notified that it was assigned by someone else and no longer needed by them.

When:

* FS Order moved to Assigned Stage
* Assigned To (person\_id) contains data

To: All Workers in the Request Workers (person\_ids) field that don’t equal the worker in the Assigned To (person\_id) field.

Email Template Name: FS Order Assigned to Another Worker Email

## Order Scheduled (Workers)

What: We email the assigned worker to let them know the order is scheduled and when its scheduled for.

When:

* FS Order moved to Scheduled Stage

To: Assigned To (person\_id).

Email Template Name: FS Order Scheduled Email

## Order Scheduled (Outage Recipients)

What: We email property staff and sometimes ownership for site and building related issues.

When:

* FS Order moved to Scheduled Stage
* Scope = Site OR Building(s)
* Ticket Type = Site Issue OR Building(s) Issue

To: All Contacts on Active Relationship Record type ‘Receives Outage Notifications From’, related to the FSM Location.

Email Template Name: Site/Building Issue FS Order Scheduled Email

## Order ETA Changed (Workers)

What: We email the assigned worker to let them know the order has a new ETA.

When:

* Order is in Scheduled Stage
* FS Order ETA is Changed

To: Assigned To (person\_id).

Email Template Name: FS Order ETA Changed Email

## Order ETA Changed (Outage Recipients)

What: We email property staff and sometimes ownership for site and building related issues and that the ETA has been updated.

When:

* Order is in Scheduled Stage
* FS Order ETA is Changed
* Scope = Site OR Building(s)
* Ticket Type = Site Issue OR Building(s) Issue

To: All Contacts on Active Relationship Record type ‘Receives Outage Notifications From’, related to the FSM Location.

Email Template Name: Site/Building Issue FS Order ETA Changed Email

## Order Completed (Workers)

What: We email the assigned worker when the order has been closed.

When:

* FS Order moved to Completed Stage

To: Assigned To (person\_id).

Email Template Name: FS Order Completed Email

## Order Completed (Outage Recipients)

What: We email property staff and sometimes ownership for site and building related issues.

When:

* FS Order moved to Completed Stage
* Scope = Site OR Building(s)
* Ticket Type = Site Issue OR Building(s) Issue

To: All Contacts on Active Relationship Record type ‘Receives Outage Notifications From’, related to the FSM Location.

Email Template Name: Site/Building Issue FS Order Completed Email

## Order Canceled (Workers)

What: We email both the assigned worker and the requested workers that the order has been canceled.

When:

* FS Order moved to Canceled Stage

To: Assigned To (person\_id) and All in Request Workers (person\_ids) field.

Email Template Name: FS Order Canceled Email

## Order Canceled (Outage Recipients)

What: We email property staff and sometimes ownership for site and building related issues.

When:

* FS Order moved to Canceled Stage
* Scope = Site OR Building(s)
* Ticket Type = Site Issue OR Building(s) Issue

To: All Contacts on Active Relationship Record type ‘Receives Outage Notifications From’, related to the FSM Location.

Email Template Name: Site/Building Issue FS Order Canceled Email

# Helpdesk

## Site/Building Issue Created

What: We email property staff and sometimes ownership for site and building related issues.

When:

* Ticket is Created
* Scope = Site OR Building(s)
* Ticket Type = Site Issue OR Building(s) Issue

To: All Contacts on Active Relationship Record type ‘Receives Outage Notifications From’, related to the FSM Location.

Email Template Name: Site/Building Issue Ticket Created Email

## Site/Building Issue Monitoring

What: We email property staff and sometimes ownership for site and building related issues.

When:

* Ticket stage changes to ‘Monitoring’
* Scope = Site OR Building(s)
* Ticket Type = Site Issue OR Building(s) Issue

To: All Contacts on Active Relationship Record type ‘Receives Outage Notifications From’, related to the FSM Location.

Email Template Name: Site/Building Issue Ticket Monitoring Email

## Site/Building Issue Closed

What: We email property staff and sometimes ownership for site and building related issues.

When:

* Ticket stage changes to ‘Solved’
* Scope = Site OR Building(s)
* Ticket Type = Site Issue OR Building(s) Issue
* Status = Solved

To: All Contacts on Active Relationship Record type ‘Receives Outage Notifications From’, related to the FSM Location.

Email Template Name: Site/Building Issue Ticket Solved Email

## Site/Building Issue Canceled

What: We email property staff and sometimes ownership for site and building related issues.

When:

* Ticket stage changes to ‘Canceled’
* Scope = Site OR Building(s)
* Ticket Type = Site Issue OR Building(s) Issue

To: All Contacts on Active Relationship Record type ‘Receives Outage Notifications From’, related to the FSM Location.

Email Template Name: Site/Building Issue Ticket Canceled Email

## Site/Building Maintenance Created

What: We email property staff and sometimes ownership for site and building related issues.

When:

* Ticket is Created
* Scope = Site OR Building(s)
* Ticket Type = Maintenance

To: All Contacts on Active Relationship Record type ‘Receives Maintenance Notifications From’, related to the FSM Location.

Email Template Name: Site/Building Maintenance Ticket Created Email

## Site/Building Maintenance Closed

What: We email property staff and sometimes ownership for site and building related issues.

When:

* Ticket stage changes to ‘Solved’
* Scope = Site OR Building(s)
* Ticket Type = Maintenance

To: All Contacts on Active Relationship Record type ‘Receives Maintenance Notifications From’, related to the FSM Location.

Email Template Name: Site/Building Maintenance Ticket Solved Email

## Site/Building Maintenance Canceled

What: We email property staff and sometimes ownership for site and building related issues.

When:

* Ticket stage changes to ‘Canceled’
* Scope = Site OR Building(s)
* Ticket Type = Maintenance

To: All Contacts on Active Relationship Record type ‘Receives Maintenance Notifications From’, related to the FSM Location.

Email Template Name: Site/Building Maintenance Ticket Canceled Email

## Individual Ticket Created

What: We want to email the individual contact, so they have a reference to their ticket.

When:

* Ticket is Created
* Scope = Individual

To: Contact on Ticket.

Email Template Name: Individual Ticket Created Email

## Individual Ticket Status Change

What: We want to email the individual contact when their ticket is updated. I think we can keep this generic at first to see how it looks, but this only is for individual ticket scope.

When:

* Ticket stage changes
* Scope = Individual

To: Contact on Ticket.

Email Template Name: Individual Ticket Stage Changed Email