

Customer Concierge Training

Module: Odoo Basic Overview

Subject: Sending messages

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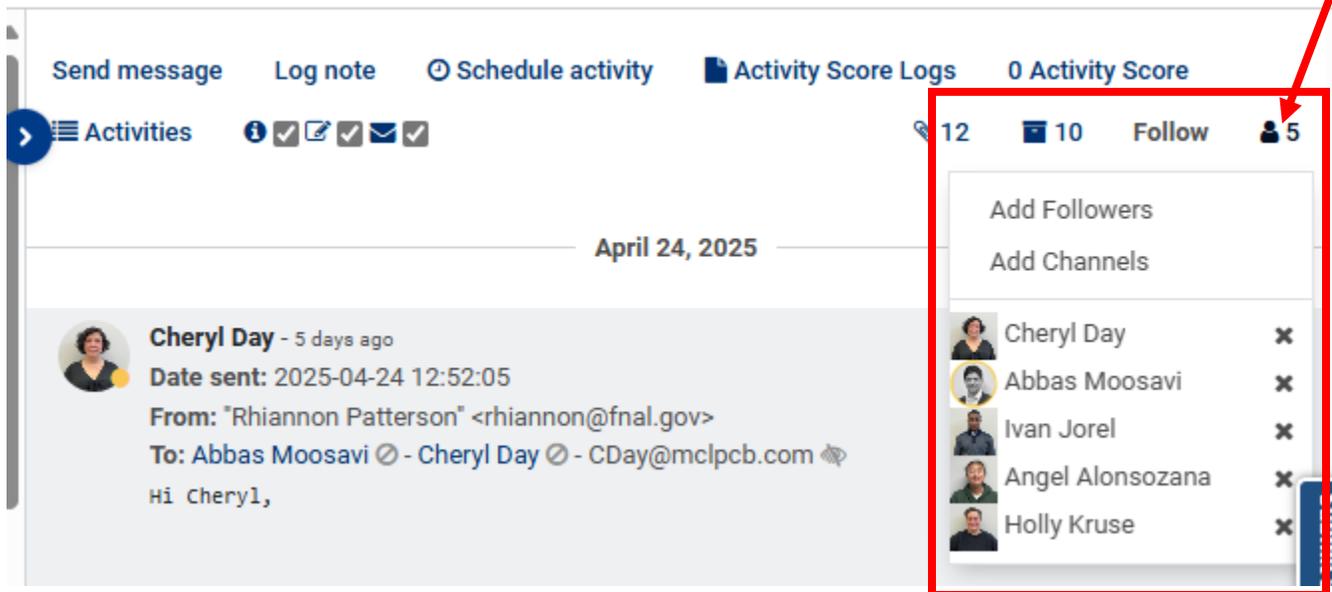
How To:

Sending a message in Odoo is saved for when you want everyone following the opp to know something on it.

You can send a message from any opportunity or company contact screen's chatter area. Here is where you will find who is following the opp and will receive your message and the button to begin the act of sending the message.



When you click on the icon  it will display who is following the opp.



When you select “send message” you will get a drop-down screen to begin your message to the team. You will see there are options to add additional people to the message. We currently do not utilize this yet.

You will simply type in your message inside the box and then click the “Send” button. This message will be recorded in the opp’s chatter and be sent to all the followers.

The screenshot shows a software interface for sending a message. At the top, there is a navigation bar with several options: "Send message" (highlighted with a red box), "Log note", "Schedule activity", "Activity Score Logs", and "0 Activity Score". Below this, there is a section for "Activities" with a right arrow, followed by icons for information, checkmarks, and a mail icon. To the right, there are statistics: "12" (with a link icon), "10" (with a document icon), "Follow", and "5" (with a person icon). The main content area is a message composition screen. It starts with a checkbox labeled "Send Message to the Engineering vendor" and "To: Followers of 'F10178373'". Below this, there is a list of email addresses with checkboxes: "rhiannon@fnal.gov (rhiannon@fnal.gov)", "rprokop@fnal.gov (rprokop@fnal.gov)", "hkreiser@mclpcb.com (hkreiser@mclpcb.com)", and "Dakota Krokosz (dakota@fnal.gov)". A text input field contains the placeholder "Write something...". Below the input field are icons for emojis and attachments. At the bottom left, there is a "SEND" button (highlighted with a red box). At the bottom right, there is a vertical button labeled "Submit a ticket".