

WhatsApp Click-to-Chat

A short, illustrated guide: install the module, click the WhatsApp button on contacts, orders and invoices, and write your own messages. Developers will find a small API chapter.

1. Start here

In plain words: This module puts a **WhatsApp button** next to the customer's phone number on Contacts, Sales Orders and Invoices. One click opens WhatsApp with a message already typed. There is nothing to connect: no Meta account, no business verification, no API keys, no monthly fee.

The screenshot shows a software interface for managing sales orders. The top navigation bar includes links for Sales, Orders, To Invoice, Products, Reporting, and Configuration. The main content area displays a sales order for S00046. The order details include customer information (Deco Addict, 77 Santa Barbara Rd, Pleasant Hill CA 94523, United Arab Emirates, US12345673) and order information (Order Date: Oct 22, 4:47 PM, Payment Terms: 30 Days). The order lines table shows two items: Wiring Services (Quantity: 5.00, Delivered: 0.00, Invoiced: 0.00, Unit Price: 1,500.00, Taxes: 15%, Amount: \$ 7,500.00) and Screw Driver (Quantity: 50.00, Delivered: 0.00, Invoiced: 0.00, Unit Price: 150.00, Taxes: 15%, Amount: \$ 7,500.00). The total amount is \$ 17,250.00. A right sidebar shows a chat history with messages from 'Mitchell Admin'.

Product	Quantity	Delivered	Invoiced	Unit Price	Taxes	Amount
Wiring Services	5.00	0.00	0.00	1,500.00	15%	\$ 7,500.00
Screw Driver	50.00	0.00	0.00	150.00	15%	\$ 7,500.00

Untaxed Amount: \$ 15,000.00
Tax 15%: \$ 2,250.00
Total: \$ 17,250.00

A sales order: the phone number now has a WhatsApp button.

You click	What happens
The WhatsApp button	WhatsApp opens (the phone app, WhatsApp Desktop or WhatsApp Web) in a chat with that customer.
Nothing else	The message is already typed, using your own template. You read it, change it if you like, and press send in WhatsApp.

Tip: Because the message is sent by *you* from your own WhatsApp account, it is not an automated broadcast. Use the module for one-to-one conversations: order questions, payment reminders, delivery updates.

2. What it adds to Odoo

Where	What you see
Contacts	A WhatsApp button under the phone number.
Sales Orders	A Phone line under the customer, with the WhatsApp button.
Invoices and credit notes	The same line under the customer or vendor.
Settings → WhatsApp	Three message templates (contact, sales order, invoice) and one option.
Chatter	An optional private note each time a chat is opened (who and which number).

The screenshot shows the Odoo Contacts interface for a company named 'Deco Addict'. The top navigation bar includes 'Contacts', 'Configuration', and a user profile. Below the navigation bar, there are tabs for 'New', 'Contacts', and 'Deco Addict'. The main content area displays the company's profile, including its logo, name, email, phone number, and address. To the right of the profile, there are buttons for 'Send message', 'Log note', and 'Activity'. Below the profile, there are tabs for 'Contacts', 'Sales & Purchase', 'Invoicing', and 'Notes'. The 'Contacts' tab is active, showing a list of contacts: Addison Olson (Sales Representative), Douglas Fletcher (Functional Consultant), and Floyd Steward (Analyst). On the right side of the interface, there is a chat window with messages from Mitchell Admin, OdooBot, and Marc Demo.

On a contact, the button sits right under the phone number.

3. Requirements

Item	Details
Odoo	19.0 (Community or Enterprise)
Apps needed	Sales and Invoicing (the module depends on <code>sale</code> and <code>account</code>)
On the user's computer or phone	WhatsApp installed, or a browser to use WhatsApp Web
WhatsApp account	Any normal or Business account of the person who clicks. No API.
License	OPL-1 (Odoo Proprietary License v1.0)

4. Install

- 1 Unzip the package. Inside is `taqnix_whatsapp_click_to_chat.zip` ; unzip it to get the folder `taqnix_whatsapp_click_to_chat` .
- 2 Copy the folder into one of the `addons_path` folders of your Odoo server and restart Odoo.
- 3 Log in as an administrator, activate **Developer mode**, open **Apps** and press **Update Apps List**.
- 4 Remove the "Apps" filter, search **WhatsApp Click-to-Chat** and press **Install**.

```
# or from the command line
./odoo-bin -c odoo.conf -d YOUR_DATABASE -i taqnix_whatsapp_click_to_chat --stop-after-init
```

Tip: After installing, press Ctrl+Shift+R (or Cmd+Shift+R) once to load the new buttons.

5. Using it

In plain words: Open a contact, an order or an invoice. If the customer has a phone number, you will see the WhatsApp button next to it. Click it.

- 1 Open the record: a contact, a sales order, or an invoice.
- 2 Click **WhatsApp** under the phone number.
- 3 WhatsApp opens with the customer's chat and your message typed in.
- 4 Check the message, edit it if you want, and send it from WhatsApp.

Sales Orders To Invoice Products Reporting Configuration 12 17 My Company (San Francisco)

New Invoices INV/2026/00002

1 / 1 < >

Send Print Pay Preview Credit Note Debit Note Reset to Draft Draft Posted Send message Log note Activity

You have outstanding credits listed below for this customer.

Customer Invoice
INV/2026/00002

Customer Deco Addict
77 Santa Barbara Rd
Pleasant Hill CA 94523
United Arab Emirates
US12345673
+971 50 123 4567 SMS WhatsApp

Invoice Date Oct 20
Due Date Oct 22
Delivery Date Oct 20
Currency in USD

Invoice Lines Other Info

Product	Quantity	Price	Taxes	Amount
[FURN_8220] Four Person Desk	5.00	2,350.00	15%	\$ 11,750.00
Two-Seat Sofa (Linen) Two-Seater Sofa with Oak Wood Frame	20.00	1,500.00	15%	\$ 30,000.00

Terms and Conditions

Untaxed Amount: \$ 41,750.00
Tax 15%: \$ 6,262.50
Total: \$ 48,012.50

Amount Due: \$ 48,012.50

Planned Activities

Yesterday: "Follow up on missed call" for Mitchell Admin
✓ Mark Done ✎ Edit ✕ Cancel

Oct 22, 2026

OdooBot Yesterday at 4:25 PM
None → Sales (Sales Team)

On an invoice the message mentions the invoice number, the amount still due and the due date.

In plain words: The first message is built from your templates (chapter 6). For an invoice it reads, for example: *"Hello Deco Addict, this is My Company regarding invoice INV/2026/00002 for \$48,012.50, due 2026-11-30. Thank you!"*

6. Messages and settings

In plain words: Open **Settings** → **WhatsApp**. You can write one message for each kind of document. Each company has its own messages.

Settings

General Settings

Users & Companies

12

17

My Company (San Francisco)

Save

Discard

Settings

General Settings

CRM

Sales

Calendar

Website

Purchase

Inventory

Manufacturing

Invoicing

Project

Employees

WhatsApp

Point of Sale

Messages

First message when you chat from a contact. Use {partner_name}, {company_name} and {user_name}.

Hello {partner_name}, this is {company_name}.

Also available: {document_name}, {amount} (the amount still due), {due_date} and {due_date_part} (" , due 2026-11-30", empty when paid).

Hello {partner_name}, this is {company_name} regarding invoice {document_name} for {amount} {due_date_part}. Thank you!

Also available: {document_name} (S00012) and {amount}.

Hello {partner_name}, this is {company_name} regarding your order {document_name} ({amount}).

Options

☒ Log chats in the chatter

Adds a private note on the contact, order or invoice each time a WhatsApp chat is opened.

Settings → WhatsApp: the three templates and the chatter option.

Placeholder	Replaced by	Where it works
{partner_name}	The customer's name	all
{company_name}	Your company name	all
{user_name}	The Odoo user who clicks	all
{document_name}	S00012 or INV/2026/00002	orders, invoices
{amount}	The order total, or the invoice amount still due	orders, invoices
{due_date}	The invoice due date (empty when paid)	invoices
{due_date_part}	" , due 2026-11-30", or nothing when the invoice is paid	invoices

Tip: Write messages in the language of your customers. If you have several languages installed, you can translate each message (open the field and use the translate icon).

7. Phone numbers that work

In plain words: WhatsApp needs the number with its country code and nothing else. The module cleans the number for you, so people can keep typing numbers the way they like.

Typed in Odoo	Sent to WhatsApp	Why
+971 50 123 4567	971501234567	spaces and + removed
00971 50 123 4567	971501234567	leading 00 means international
(+971) 50-123-4567	971501234567	brackets and dashes removed
050 123 4567	971501234567	local number: the calling code of the contact's country (or your company's country) is added and the 0 removed
(415) 555-0132 with country United States	14155550132	country code taken from the contact's country

Important: A local number such as 050... needs a **country** on the contact (or on your company) to become a full number. If the module cannot make a valid number it tells you, and nothing opens.

8. The chatter note

Each time someone opens a chat, the module can leave a **private note** on the record: *"Mitchell Admin opened a WhatsApp chat with +971501234567."* It helps the team see who contacted the customer and when. Switch it off under **Settings → WhatsApp → Log chats in the chatter**.

SalesOrdersTo InvoiceProductsReportingConfiguration

1217My Company (San Francisco)

NewSales OrdersS00046

1 Projects1 Tasks1 Delivery

1 / 1<>

Create InvoiceSendPreviewCancel

QuotationQuotation SentSales Order

Send messageLog noteActivity

S00046

CustomerDeco Addict77 Santa Barbara RdPleasant Hill CA 94523United Arab EmiratesUS12345673

Order Date?Oct 22, 4:47 PM

Payment Terms30 Days

Phone?+971 50 123 4567SMSWhatsApp

Quotation Template

Order LinesQuote BuilderOther Info

Product	Quantity	Delivered	Invoiced	Unit Price	Taxes	Amount
Wiring Services	5.00	0.00	0.00	1,500.00	15%	\$ 7,500.00
Screw Driver	50.00	0.00	0.00	150.00	15%	\$ 7,500.00

Add a productAdd a sectionAdd a noteCatalog

Terms and conditions...

Untaxed Amount:\$ 15,000.00

Tax 15%:\$ 2,250.00

Total:\$ 17,250.00

Today

Mitchell Admin1:10 AM

Mitchell Admin opened a WhatsApp chat with +971501234567.

Mitchell Admin1:10 AM

Mitchell Admin opened a WhatsApp chat with +971501234567.

Mitchell Admin1:09 AM

Mitchell Admin opened a WhatsApp chat with +971501234567.

Mitchell Admin1:08 AM

Mitchell Admin opened a WhatsApp chat with +971501234567.

Oct 22, 2026

Mitchell AdminYesterday at 4:47 PM

Quotation confirmed

Quotation → Sales Order (Status)

Mitchell AdminYesterday at 4:46 PM

Sales Order created

The note appears in the chatter of the order.

9. For developers

In plain words: Skip this chapter if you only use the module.

Item	Details
Model	<code>taqnix.whatsapp.chat</code> (abstract). No data is stored.
<code>chat_url(res_model, res_id, number)</code>	RPC returning the <code>https://wa.me/...?text=...</code> link; logs the chat when enabled.
<code>normalize_number(number, country)</code>	Returns digits only, or raises <code>UserError</code> .
<code>render_message(record)</code>	Fills the company template for the record.
Widget	<code>widget="wa_phone"</code> : use it on any <code>Char</code> field to get the button.

```
<!-- show the button next to another phone field, for example on employees -->
<field name="mobile_phone" widget="wa_phone"/>
```

```
# Python
```

```
url = self.env['taqnix.whatsapp.chat'].chat_url('res.partner', partner.id, partner.phone)
```

10. Troubleshooting

Problem	What to do
There is no WhatsApp button	The customer has no phone number, or you need a hard refresh (Ctrl+Shift+R) after installing.
"does not look like a valid phone number"	Add the country code (+971...) or set the country on the contact.
WhatsApp says the number is not on WhatsApp	The number is right but the person does not use WhatsApp, or the number is a landline.
The browser blocks the new window	Allow pop-ups for your Odoo address.
The message still has { } words	A placeholder is misspelled. Use only the ones listed in chapter 6.

11. Updating and removing

Replace the folder with the new version, restart Odoo and run `-u taqnix_whatsapp_click_to_chat` . Your messages are kept. To remove it, uninstall it from Apps: the buttons disappear and no data is left on your contacts, orders or invoices (the chatter notes stay as ordinary notes).

12. Support

Installation help and bug fixes are included for 6 months, with lifetime updates. Contact us through the marketplace page where you bought the module or write to **support@taqnix.com** with your Odoo version and a screenshot.

Changelog

1.0.1 – Package fix

- The licence file (licensing/license.txt) is now included in the download package

1.0.0 – Initial release

- WhatsApp button next to phone numbers on contacts, sales orders and invoices (wa.me, no API)
- Message templates per company for contacts, sales orders and invoices with placeholders
- Phone number cleanup and country-code handling, clear error for invalid numbers
- Optional chatter note per chat, reusable wa_phone field widget, Arabic translation, automated tests