Integration

The Odoo Integration

With the Odoo integration, Claritalk ensures that everything you discuss in a meeting is automatically placed in the right location in your Odoo environment. No more manual data entry of tasks or uploading reports — it happens automatically.

Watch the video

Video demo of the Odoo integration

In a nutshell

Once a meeting in Claritalk is processed, the integration can do two things for you:

- **Create tasks in Odoo** — all action items from the meeting are added as tasks (project.task) in Odoo, neatly linked to the correct appointment in your calendar.
- **Upload a PDF report to Odoo** — the full report is added as an attachment to the calendar appointment. Optionally, the summary can also be added as a note to the appointment.

What happens after a meeting?

1. **The meeting is processed**

   After your conversation has ended, Claritalk creates the report, summary, and task list — as always, regardless of whether you have an Odoo integration.

2. **The system checks: can I send?**

   The integration only works if your Odoo integration is **active and connected**, the desired actions are **enabled** in your settings, and the meeting is **linked to an appointment in your Odoo calendar** (otherwise the system doesn't know where to place the tasks and attachments). If your organization uses an approval workflow, the report will only be sent after approval.

3. **The actions are executed**

   Create tasks: for each action item, Claritalk creates a task in Odoo, with a direct link back to the calendar appointment in the description.

Upload PDF report: the report is added as a PDF to the Odoo appointment; the file name contains the meeting name and date.
Optional — summary as note: the summary is added below the existing notes on the appointment, never overwritten.

When is it sent?

When	What happens
Automatically after processing	If you don't use an approval workflow, everything goes directly to Odoo after the meeting is processed.
After approval	If you use an approval workflow, Claritalk waits until the meeting is approved.
Manually	You can always click **"Send to integration"** yourself for a meeting to send everything (again) through.

What can you configure yourself?

You have full control over what does and doesn't go to Odoo. In your profile settings under **Marketplace** › **Odoo** you can:

- **Turn the integration on or off** by entering your Odoo details (Odoo URL, database, email, and password).
- **Configure each action** to indicate whether you want to use it (create tasks, upload PDF, summary as note).
- **Link to a meeting type** — limit actions to certain types of meetings, for example only customer calls.
- **Choose report type** — determine which PDF report is uploaded (default: "General Report").

What data is exchanged?

From Claritalk to Odoo:

- The action items/tasks from your meeting.
- The PDF report of the meeting.
- Optional: a text summary as a note.
- A link between task and calendar appointment.

From Odoo to Claritalk:

- Your calendar appointments from the past 7 days — so you can link a meeting to the correct Odoo appointment.
- The notes attached to those appointments.

What if something goes wrong?

If the integration doesn't work (for example because your Odoo password has changed or an appointment no longer exists), you'll be notified. When sending manually, you'll receive an email notification if something goes wrong. Reconnect your integration in your settings and send again manually.

Security

Encrypted
Your Odoo login credentials (URL, database, username, and password) are **encrypted and stored securely**. When setting up, Claritalk checks whether your Odoo account has the correct permissions to read appointments and create tasks and attachments; if these permissions are missing, you'll be notified immediately.

Frequently Asked Questions

- **Do I need to do anything per meeting to use the integration?** No. As long as your meeting is linked to an Odoo calendar appointment and the actions are enabled, everything happens automatically.
- **Can I adjust the summary before it goes to Odoo?** Yes — use the approval workflow, or send the meeting manually to the integration once you're satisfied.
- **What happens if I send a meeting again?** The tasks and PDF report are recreated in Odoo. Notes are added, not overwritten.
- **Does this work without a linked calendar appointment?** No. The integration needs an Odoo appointment as an "anchor" to attach tasks and attachments to.

Found an error or have a suggestion? Let us know at support@claritalk.com and we'll help you further right away.