Generative Z

THE PLAYBOOK

THE ODOO HUB PLAYBOOK

Connect every tool to one brain. 12 automations that wire WhatsApp, Gmail, ads, payments and your team into Odoo, with n8n and AI agents.

FREE · NOVEMBER 2026



Capture once. Approve what matters.

www.generativez.es

BEFORE YOU START

One brain for your business.

Most small businesses already pay for good tools: an ads account, WhatsApp, Gmail, Slack, a payment provider, maybe a shop. The problem is not the tools. It is the person in the middle, copying a lead into a spreadsheet, a message into the CRM and a payment into the books. This playbook shows how to make Odoo the single place where everything lands, with n8n moving the data and AI agents doing the first draft.

How to read it

Pages 3 to 5 explain the idea and the architecture. Then come twelve automations, two per page, each with its trigger, its steps, the Odoo app it writes to, example tools and the moment you stay in control.

How to use it

Do not build all twelve. Measure where your hours go first (page 3), pick the three automations that save the most, and follow the 30-day plan on page 13.

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THE PROBLEM

The copy-paste tax

Every manual hand-off between two tools costs a few minutes. Nobody notices one. Over a year they add up to weeks. Here is the example a small team gets in our free calculator:

TASK	VOLUME	EACH
New leads typed into a CRM or spreadsheet	20 / week	4 min
Client messages copied between WhatsApp, email and records	60 / week	1.5 min
Quotes and invoices built by hand	8 / week	15 min
Meetings booked and logged by hand	6 / week	5 min
Orders or payments entered twice	10 / week	3 min
Reporting pulled together by hand	2 h / week	—

360
hours a year

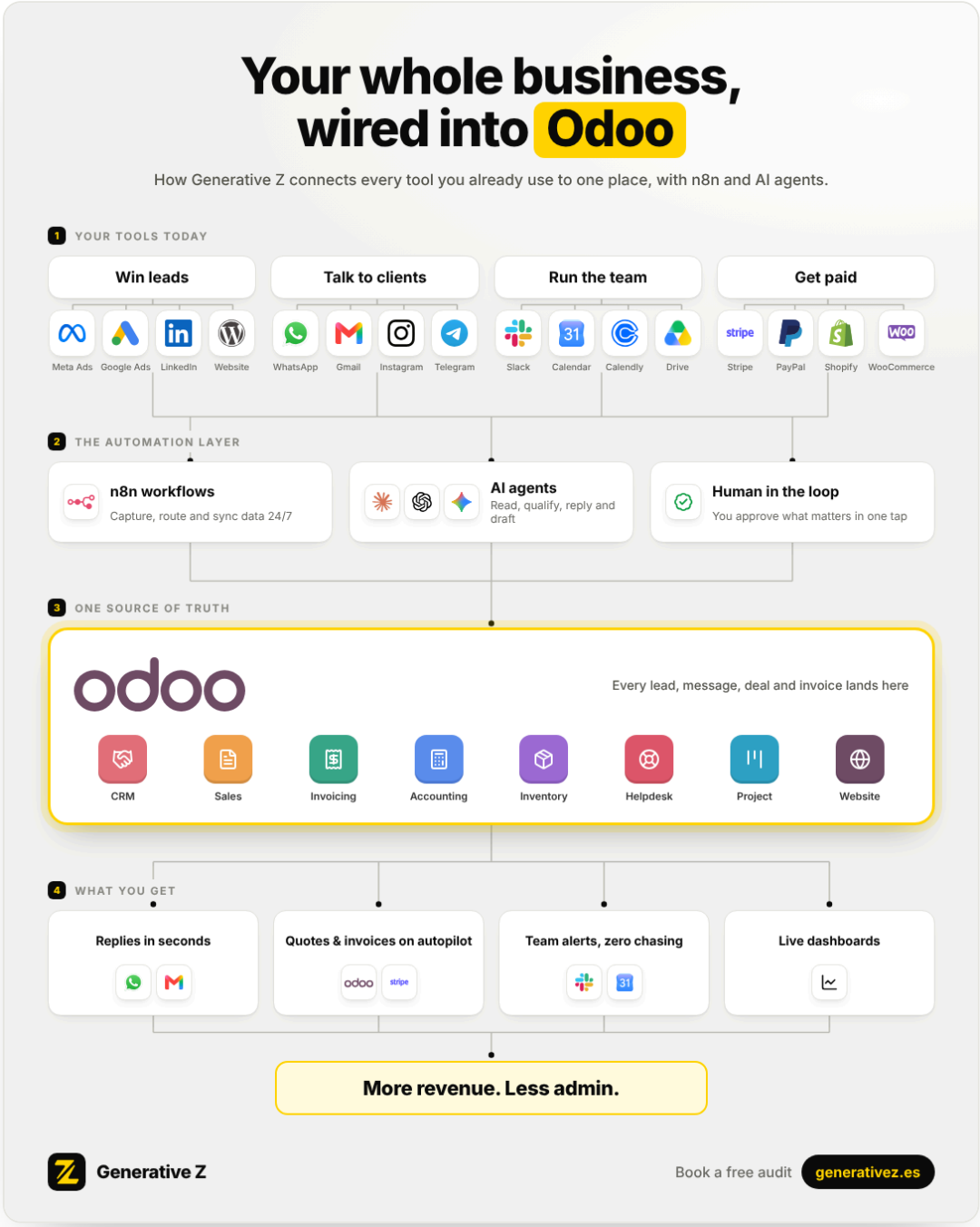
45
working days

€10,810
at €30 an hour

Illustrative example: 46 working weeks, minutes per task as shown. Your numbers will differ: measure them in two minutes with the free calculator at generativez.es.

The Odoo hub, on one page

Your tools stay. n8n connects them, AI agents read and draft, you approve, and every record lands in Odoo.



THE IDEA

Three layers, three rules

1

Your tools

Ads, website, WhatsApp, Gmail, Slack, Calendly, Stripe, PayPal, Shopify, WooCommerce. Your clients and your team keep using them.

2

The automation layer

n8n workflows move the data on every event. AI agents (Claude, OpenAI, Gemini) read, classify, summarise and draft. A human approval step sits before anything leaves the company.

3

Odoo, the source of truth

CRM, Sales, Invoicing, Accounting, Inventory, Helpdesk and Projects. Every contact, deal, quote, order and invoice exists once, here.

THE THREE RULES

1

Capture once

A piece of information is typed by a human once, or not at all. Everything after that is copied by a workflow.

2

Odoo wins

If two tools disagree, Odoo is right. Workflows read from and write to Odoo first, then update the other tools.

3

You approve what matters

AI drafts. A person approves anything a client will read, sign or pay. Internal notes and alerts can run on their own.

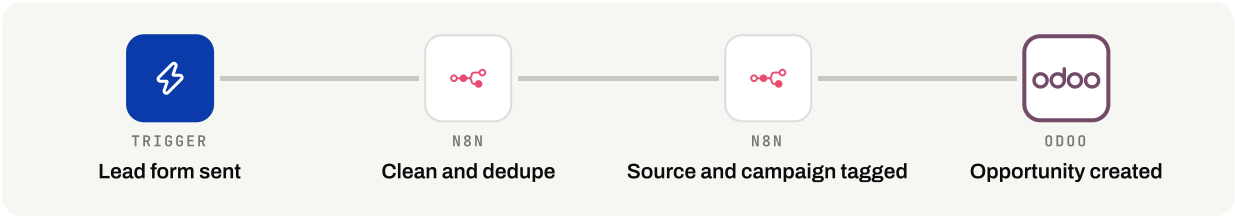
Capture every lead and message

01

CAPTURE

Ad leads straight into the CRM

Leads from Meta, Google and LinkedIn lead forms arrive in Odoo in seconds, not when someone exports a file.



TRIGGER
A new lead form submission

WRITES TO ODOO
CRM

EXAMPLE TOOLS

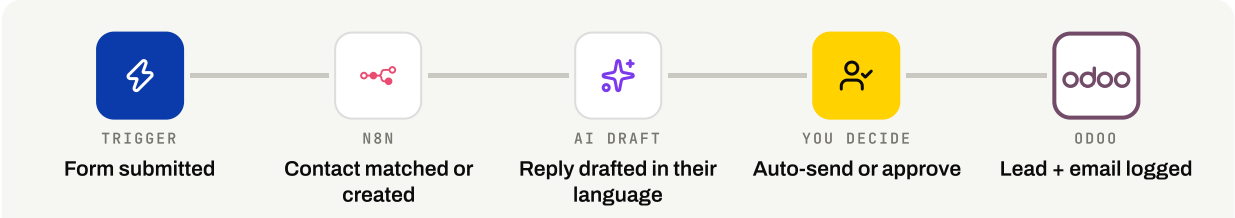
You stay in control No draft here: the workflow only creates records. Duplicates go to a review list instead of being merged blindly.

02

CAPTURE

Website form, instant answer

The visitor gets a reply in their language while they are still on your site, and the sales team sees the lead in Odoo.



TRIGGER
A contact form on your website

WRITES TO ODOO
CRM

EXAMPLE TOOLS

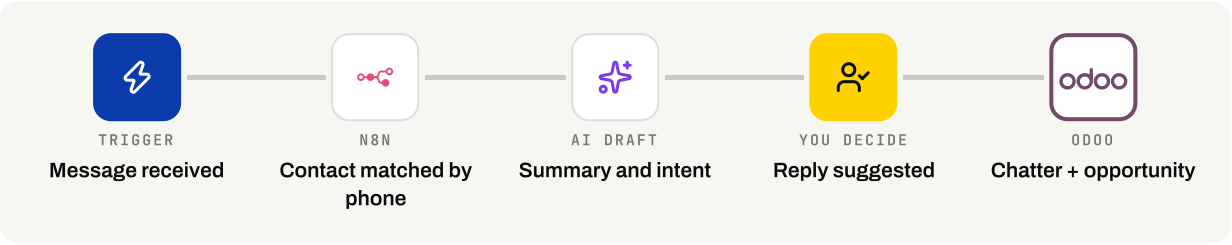
You stay in control Choose per form: a standard confirmation can go automatically, a reply with prices waits for you.

03

CAPTURE

WhatsApp conversations in Odoo

WhatsApp is where clients talk. Each new conversation becomes a contact and an opportunity, with an AI summary instead of screenshots.



TRIGGER
A new message on WhatsApp Business

WRITES TO ODOO
CRM

EXAMPLE TOOLS

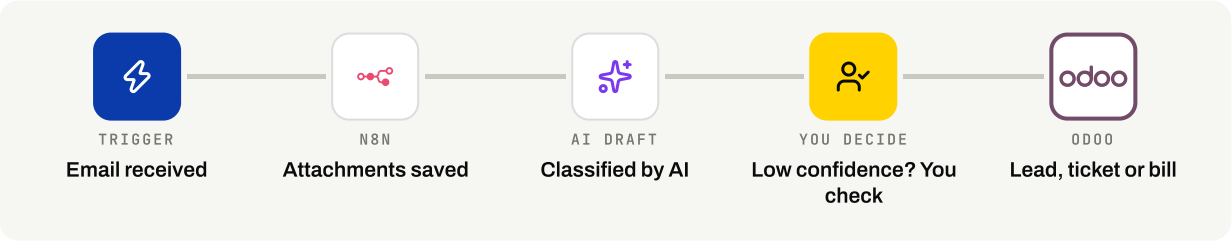
You stay in control Suggested replies are sent only when someone presses send. The full conversation stays on WhatsApp; Odoo keeps the summary.

04

CAPTURE

Inbox triage into the right app

Sales enquiries become leads, support questions become tickets, invoices go to accounting. Nobody forwards emails all day.



TRIGGER
A new email in a shared inbox

WRITES TO ODOO
CRM · Helpdesk

EXAMPLE TOOLS

You stay in control When the AI is unsure, the email goes to a review list in Odoo with its suggested category.

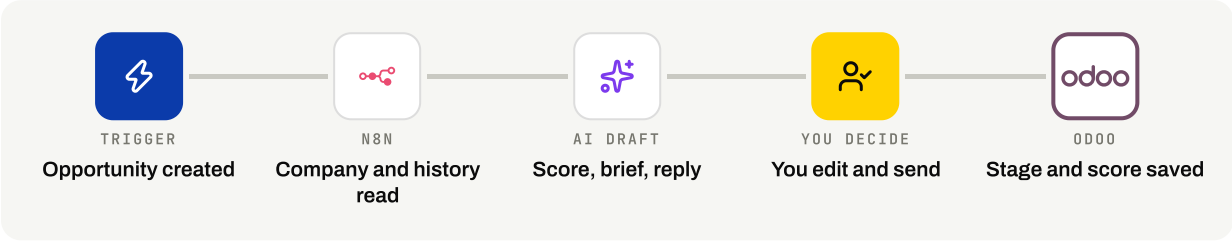
Sell faster, with AI drafts

05

SELL

AI qualification and first reply

Every new lead gets a fit score, a short brief and a first reply drafted from your own services and prices.



TRIGGER
A new opportunity in the CRM

WRITES TO ODOO
CRM

EXAMPLE TOOLS

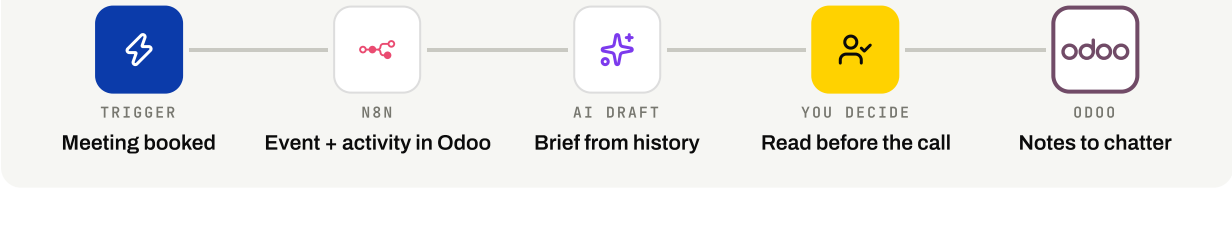
You stay in control The score helps you sort; it never closes a lead. Every reply is approved before it is sent.

06

SELL

Bookings with a call brief

When a client books, Odoo knows, the team is told, and you walk into the call with a one-page brief.



TRIGGER
A meeting booked on Calendly

WRITES TO ODOO
CRM · Calendar

EXAMPLE TOOLS

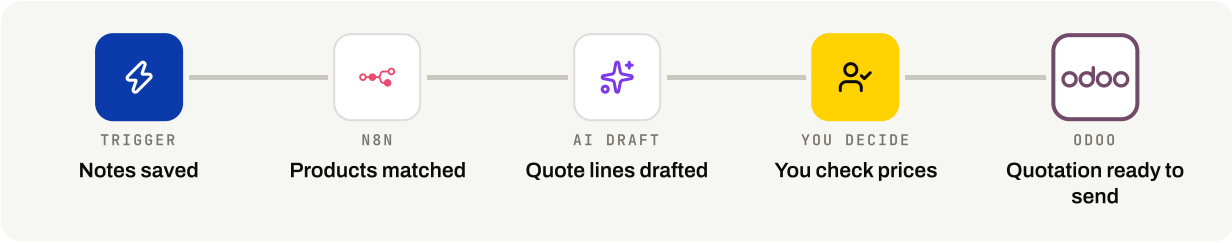
You stay in control The brief is internal. After the call you paste or dictate your notes; the workflow files them, it does not invent them.

07

SELL

From call notes to a quote

Rough notes become a draft quotation in Odoo Sales with the right products, quantities and terms.



TRIGGER
Notes added to an opportunity

WRITES TO ODOO
Sales

EXAMPLE TOOLS

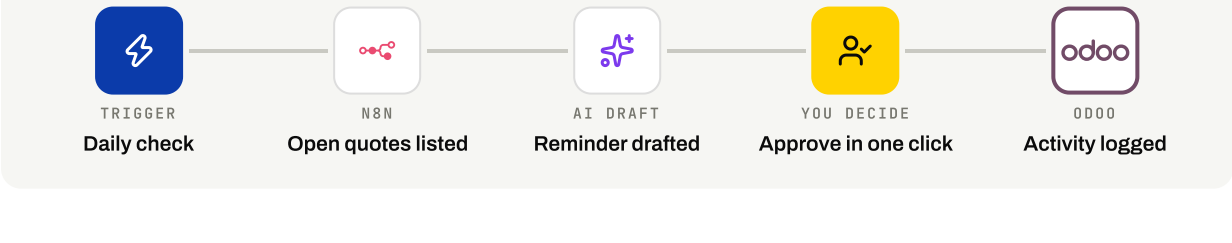
You stay in control The AI picks products from your Odoo catalogue only. You review every line and price before the quote goes out.

08

SELL

Follow-ups nobody forgets

Open quotes get a polite reminder at the right moment, by email or WhatsApp, and the deal moves on.



TRIGGER
A quote open for X days

WRITES TO ODOO
Sales

EXAMPLE TOOLS

You stay in control You set the delays and the maximum number of reminders. Any reply from the client stops the sequence.

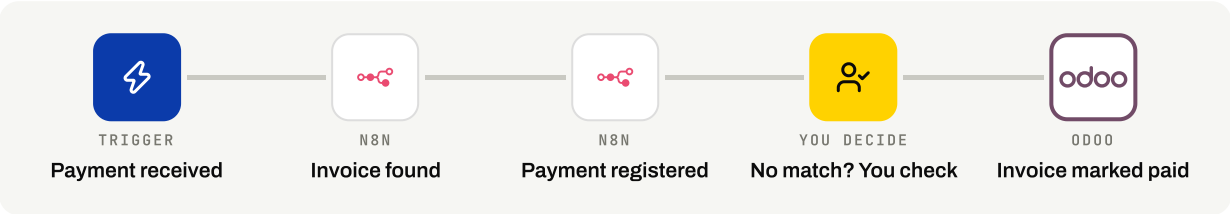
Get paid and run the business

09

GET PAID & RUN

Payments matched to invoices

Stripe and PayPal payments are recorded against the right Odoo invoice, so the books and the CRM agree.



TRIGGER
A successful payment

WRITES TO ODOO
Invoicing · Accounting

EXAMPLE TOOLS
stripe

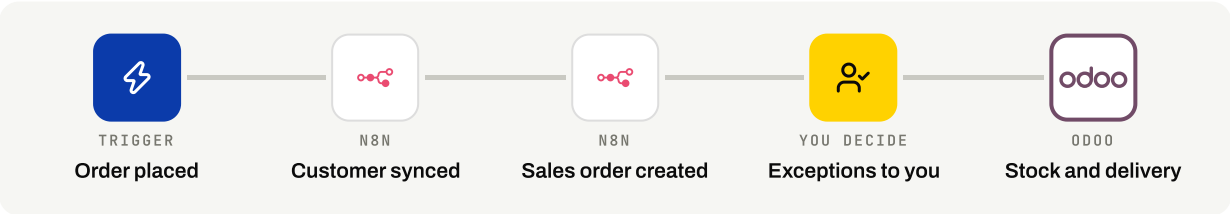
You stay in control Unmatched payments are never forced onto an invoice: they wait in a short list for your accountant.

10

GET PAID & RUN

Shop orders without double entry

Shopify and WooCommerce orders become Odoo sales orders, with stock and customer updated once.



TRIGGER
A new order in your shop

WRITES TO ODOO
Sales · Inventory

EXAMPLE TOOLS

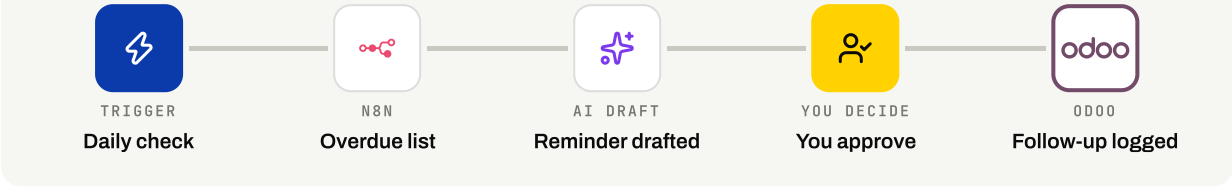
You stay in control Price or stock mismatches stop the workflow and alert you, instead of creating a wrong order.

11

GET PAID & RUN

Overdue invoices, handled early

The team is told in Slack the day an invoice is late, with a reminder ready to send to the client.



TRIGGER
An invoice past its due date

WRITES TO ODOO
Invoicing

EXAMPLE TOOLS

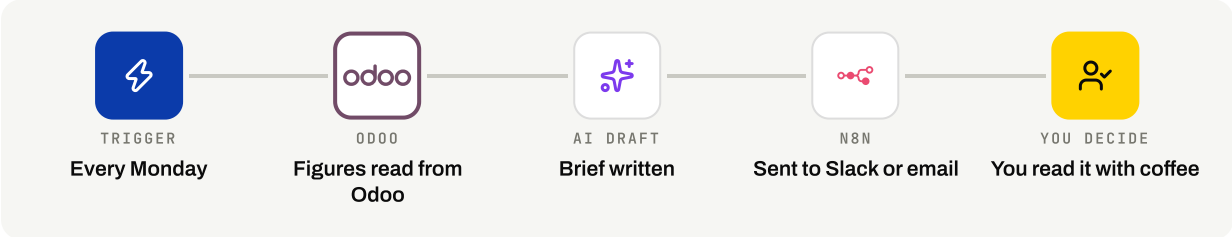
You stay in control Reminders to clients always wait for approval. Tone and timing follow your own rules.

12

GET PAID & RUN

A Monday brief from Odoo

New leads, open quotes, cash in and out, and the three things that need you this week, in one message.



TRIGGER
Every Monday at 8:00

WRITES TO ODOO
All apps

EXAMPLE TOOLS

You stay in control Code computes every number from Odoo; the AI only writes the summary around them.

THE STACK

What you need, and how to keep it safe

Odoo

Community or Enterprise, online or self-hosted. The apps you need: usually CRM, Sales and Invoicing to start.

n8n

Cloud or self-hosted. One workflow per automation, plus an error workflow that alerts you if anything fails.

An AI model

Claude, OpenAI or Gemini through an API key. Only the text it needs is sent, never your whole database.

Your tool accounts

WhatsApp Business, Google Workspace, ad accounts, Stripe or PayPal, your shop. Admin access to connect them once.

Security checklist

- A dedicated Odoo user for automations, with only the rights it needs
- Personal data kept to the minimum each step needs (GDPR)
- Human approval before anything a client reads, signs or pays
- API keys stored in n8n credentials, never in a workflow or a document
- Every workflow logs what it did, and failures alert a person
- Start in a test database, then switch to production

THE PLAN

Your first 30 days

WEEK 1

Measure and map

Run the calculator, list your tools and the hand-offs between them. Pick the three automations that save the most hours.

WEEK 2

Capture

Connect lead sources and the inbox (01–04). Every new contact now lands in Odoo once.

WEEK 3

Sell

Add AI qualification, call briefs and quote drafts (05–07), with approval steps switched on.

WEEK 4

Get paid and measure

Connect payments and the Monday brief (09, 12). Compare the hours with week 1 and choose the next three.

One automation in production beats twelve in a notebook. Ship one a week.

Generative Z

WANT IT BUILT FOR YOU?

Generative Z connects your tools to Odoo with n8n and AI agents: audit, set-up, training, and a human check at every key step.

- ✓ **Free audit of your tools and hand-offs**
- ✓ **Calculate your copy-paste hours in 2 minutes**
- ✓ **Spanish, English and French**

Book your free audit www.generativez.es