Marketing Automation (Community)

User Guide

Odoo 18 / 19 · Community Edition

Email / Comms & Marketing

pokutsoft.com

support@pokutsoft.com

Table of Contents

1. Overview
2. Installation
3. Configuration
4. Step-by-step Usage Walkthrough
5. Feature Reference
6. Tips, Troubleshooting & FAQ
7. Support

1. Overview

Marketing Automation (Community) brings drip campaigns, behavioural triggers, multi-step journeys, A/B testing and analytics to Community Odoo — a replacement for the Enterprise-only Marketing Automation app. Build a campaign on a target model, add a chain of activities, and let participants flow through automatically.

Participants are enrolled by a trigger, each activity (email, wait, condition) is executed by a scheduled engine, and per-step traces record exactly what happened. UK senders can respect PECR consent in their audience selection.

Who is it for?

Marketing teams on Community Odoo who need automated nurture journeys without paying for Enterprise.

Technical name	gb_marketing_automation
Category	Email / Comms & Marketing
Depends on	mail, contacts
Edition	Odoo 18 / 19 Community (no Enterprise required)
Licence	LGPL-3

2. Installation

The module installs like any standard Odoo application. You need a user with the Administration / Settings access right to add an app.

- Activate Developer Mode (Settings ▸ General Settings ▸ Developer Tools) if the Apps menu is hidden.
- Open Apps and click Update Apps List so Odoo re-scans the add-ons path.
- Search for “Marketing Automation (Community)” (technical name **gb_marketing_automation**).
- Click Install. Odoo loads the models, security groups, menus and any scheduled actions.
- Refresh the browser; the new top-level menu Marketing Automation appears.

Dependencies

This app depends on mail, contacts. Odoo installs any missing dependency automatically.

3. Configuration

Build a campaign and its activity chain; the engine runs participants through it.

Campaigns — Marketing Automation ▸ Campaigns

Create a campaign (ma.campaign) on a target model with a domain that selects the audience. The campaign runs Draft → Running → Completed.

Activities — Marketing Automation ▸ Configuration ▸ Activities

Activities (ma.activity) are the steps — send an email, wait, branch on a condition — chained into a journey.

Triggers

A scheduled action (_cron_enrol_triggered) enrols records that meet the trigger; another (_cron_process_traces) executes due steps.

4. Step-by-step Usage Walkthrough

Design the journey, start the campaign, then watch participants progress.

Step	What you do
1. Create campaign	In Campaigns set the target model and the audience domain.
2. Build journey	Add activities (emails, waits, conditions) in sequence to form the drip / journey.
3. Start	Press Start (action_start); the campaign becomes Running and begins enrolling participants.
4. Enrolment	Matching records become participants (ma.participant); the engine executes each step on schedule.
5. Monitor	Open Participants and Step Traces (action_view_traces) to follow progress and see each step's outcome.
6. Pause / stop	Use Pause / Resume / Stop to control the campaign; Reset to Draft to edit it.

Status lifecycle

Campaign: Draft → Running → Completed (Pause/Resume/Stop available). Each participant follows the activity chain step by step.

5. Feature Reference

Drip campaigns

Multi-step email journeys on any target model.

Behavioural triggers

Records are enrolled automatically when they meet a trigger condition.

Journeys & branching

Chained activities with waits and conditional branches.

A/B testing

Test variants within a journey to compare performance.

Participants & traces

Per-participant progress and per-step traces (ma.trace) for full visibility.

Analytics

Campaign analytics on enrolment and step execution.

Lifecycle control

Start, pause, resume and stop a campaign at any time.

6. Tips, Troubleshooting & FAQ

Q. Do I need Enterprise for this?

A. No. It is a Community engine depending only on mail and contacts.

Q. How are participants enrolled?

A. By trigger — a scheduled action enrols records that match the campaign's audience and trigger condition.

Q. What is a trace?

A. A record of a single step's execution for a participant, so you can see exactly what happened and when.

Q. Can I test variants?

A. Yes. A/B testing lets you compare alternative steps within the journey.

Q. How do I pause a live campaign?

A. Press Pause; resume later, or Stop to end it. Reset to Draft to make edits.

Q. Does it help with PECR consent?

A. You control the audience via the campaign domain, so you can restrict sending to consented contacts.

7. Support

We provide application support and integration guidance for this module. If you hit an issue, please include your Odoo version (18 or 19), the module version, and a short description with a screenshot.

Email	support@pokutsoft.com
Catalogue	https://pokutsoft.com
Author	Pokutsoft
Licence	LGPL-3

Thank you for choosing Marketing Automation (Community). This guide documents the features as implemented in the module; menu labels and field names match what you see in Odoo.