No-Code Automation Rules

If-this-then-that automation on any model — triggers, conditions, actions, schedules & webhooks

User Guide · Odoo 18 / 19 Community
Category: Productivity & Automation
Technical name: gb_no_code_automation_rules_builder

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This guide documents only features implemented in the module. Menu paths, field names and button labels match the application exactly.

1. Overview

No-Code Automation Rules is a Community automation engine. It lets administrators build if-this-then-that rules on any model without Python or Odoo Studio: choose a trigger, add conditions, then chain one or more actions.

It exists because powerful automation and Studio are Enterprise-only. This module provides a self-contained rule builder with create/update/delete and time-based triggers, AND/OR condition logic, a dry-run tester and a full run log.

Who it is for

- Administrators automating routine record changes and notifications.
- Operations teams who need scheduled or event-driven actions.
- Anyone wanting Studio-style automation on Odoo Community.

Key capabilities at a glance

- Triggers — Create, Update, Create-or-Update, Delete and Time-based scheduled triggers.
- Conditions — Field comparisons with twelve operators plus ALL/ANY logic and an optional domain.
- Actions — Update, Create, Email template, Log note, Add followers, Webhook (BYOK) and Run child rule.
- Dry-run tester — Wizard previews matched records and counts before any change is made.
- Run log — Per-record history with state, trigger kind, message, re-run and open-record buttons.
- Loop guard — Max-runs-per-record limit and run/error counters on each rule.

2. Installation

Install from the Odoo Apps menu with Administrator access; dependencies are pulled in automatically.

1. Open Apps from the main Odoo menu.
2. Click Update Apps List to refresh the catalogue.
3. Search for “No-Code Automation Rules”.
4. Click Install on the matching card.
5. The Automation menu appears once installation finishes.

Technical name	gb_no_code_automation_rules_builder
Depends on	mail
Odoo versions	18.0 and 19.0
Licence	LGPL-3

3. Configuration

All configuration is in the Automation app. Rules are created under Automation ▸ Rules; runs are visible under Automation ▸ Logs.

Choose a trigger

- Triggers: On Creation, On Update, On Creation or Update, On Deletion, or Time-based (scheduled).
- For On Update you can list the watched fields so the rule only fires on relevant changes.
- For Time-based rules pick a date field plus an offset (minutes/hours/days/weeks/months).

Define conditions

- Set condition logic to Match ALL (AND) or Match ANY (OR).
- Each condition compares a field with operators =, !=, >, >=, <, <=, is set, is not set, contains, does not contain, in, not in.
- Optionally add a raw filter domain for advanced matching.

Add actions

- Action types: Update Field Values, Create Related Record, Send Email (Template), Post Message / Log Note, Add Followers, Call Webhook (BYOK) and Run Child Rule.
- Update actions take field/value rows where the value can be static or a Python expression.
- Webhook actions post a JSON payload to your own URL with a configurable timeout.

4. Step-by-Step Usage

Build the rule, dry-run it against existing records, then activate it.

Create a rule

1. Go to Automation ▸ Rules and create a new rule; pick the target model and trigger.
2. Add conditions and choose ALL or ANY logic.
3. Add one or more actions in sequence.
4. Set an optional max runs per record to prevent loops.

Test before going live

1. Open the rule's Test / Dry-Run wizard.
2. It scans matching records and reports matched vs scanned counts and a preview.
3. Tick execute for real only when you are ready to apply actions to the sample.

Run and monitor

1. Activate the rule; create/update/delete events now fire it automatically (scheduled rules run on the cron).
2. Use Run Now for an immediate pass.
3. Open Logs to see each run's state (Running/Done/Failed/Skipped), the trigger kind and any message; re-run or open the source record from the log.

5. Feature Reference

Each row corresponds to a real menu, model or wizard in the module.

Triggers	Create, Update, Create-or-Update, Delete and Time-based scheduled triggers.
Conditions	Field comparisons with twelve operators plus ALL/ANY logic and an optional domain.
Actions	Update, Create, Email template, Log note, Add followers, Webhook (BYOK) and Run child rule.
Dry-run tester	Wizard previews matched records and counts before any change is made.
Run log	Per-record history with state, trigger kind, message, re-run and open-record buttons.
Loop guard	Max-runs-per-record limit and run/error counters on each rule.

6. Tips, Troubleshooting & FAQ

Q. Do I need developer mode or Python?
A. No. Rules are built entirely from drop-downs. Python expressions are optional for advanced field values only.

Q. Will a rule loop forever if it updates its own model?

A. Set Max runs per record to cap how often a single record can trigger the rule, which prevents loops.

Q. How do webhooks work?
A. The Call Webhook action posts your JSON payload to your own URL (BYOK) with a timeout. No third-party service is bundled.

Q. Can one rule trigger another?
A. Yes — the Run Child Rule action chains rules together.

Q. How do I test without affecting data?
A. Use the Test / Dry-Run wizard; it counts matches and shows a preview without executing unless you tick 'execute for real'.

Q. Where do I see failures?
A. Automation ▸ Logs lists every run with a Failed state and message, and offers a re-run button.

7. Support

We are happy to help with installation, configuration and usage questions.

Email	support@pokutsoft.com
Apps & catalogue	https://pokutsoft.com
Module	No-Code Automation Rules (v18.0 / v19.0)

When contacting support, please include your Odoo version, the module version and a short description of the steps that led to the issue.