Reminder & Follow-up Engi

User Guide · Odoo 18.0 & 19.0

Snooze, follow-up and escalate any record so nothing slips through the cracks

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1. Overview

Reminder & Follow-up Engine ==========

Attach a personal reminder or follow-up to ANY record in Odoo. Snooze it, build a personal worklist, and let the engine escalate the reminder to a manager when it is repeatedly ignored.

Native Odoo activities are limited to specific models and offer no snooze, no personal worklist and no automatic escalation chain. This module fills that gap with a lightweight, generic follow-up engine that works on every model and runs a scheduled job to fire due reminders and escalate the overdue ones.

Highlights: * Snooze a reminder by minutes/hours/days from any record (smart button). * Personal worklist filtered to the current user with overdue counters. * Configurable escalation policy: after N misses, reassign / notify manager. * Recurring reminders (daily/weekly/monthly) with auto re-arming. * Scheduled cron fires due reminders and escalates ignored ones.

2. Installation

Open Apps, click Update Apps List, search for “Reminder & Follow-up Engi” (technical name **gb_reminder_follow_up_engine**) and press Install. The module supports Odoo 18.0 and 19.0, Community and Enterprise.

3. Menus & Navigation

After install the following menus become available:

- Reminders
- My Worklist
- All Reminders
- Configuration
- Policies
- Digests

4. Feature & Data-Model Reference

The app implements the following records and engines:

Model	Purpose
gb.reminder.digest	Reminder Worklist Digest
gb.reminder.mixin	Reminder Follow-up Mixin
gb.reminder.followup	Reminder / Follow-up
gb.reminder.policy	Reminder Escalation Policy
gb.reminder.snooze.wizard	Snooze Reminder Wizard

5. Typical Workflow

1. Open the app's Configuration menu and set up the master data / policies it needs.
2. Create the main operational record from its primary menu.

3. Use the action buttons on the form (e.g. Confirm / Compute / Post / Generate) to run the engine.
4. Review the results in the list, pivot and report views; export or post where applicable.

6. Support

Email **support@pokutsoft.com** or visit **https://pokutsoft.com**. Please include your Odoo version (18.0 / 19.0) and the module technical name.