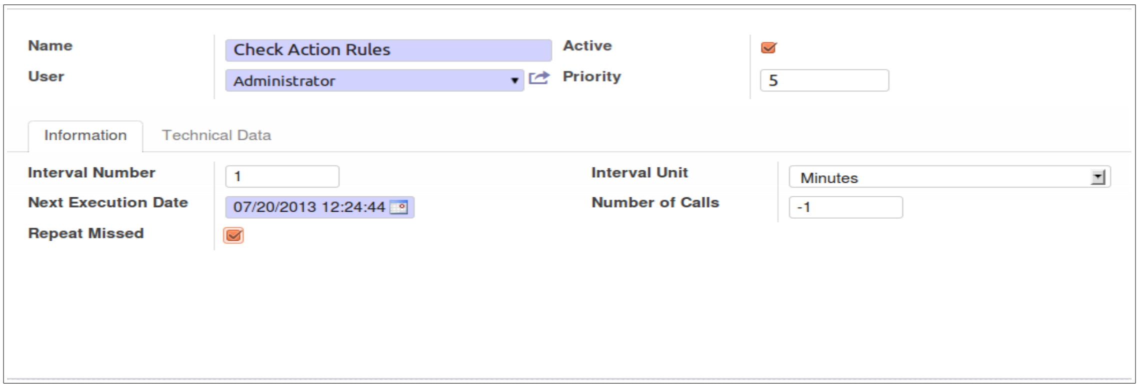
Automated Action Rule for Project Issue

- OpenERP's Automated Actions is a module usually Associated with CRM modules, allowing to automate sales process steps, without the need to write Python code.
- For create any Action rules you must have the module "Automated Action Rules" diplay as following:

- Now if the user have "Technical Features " access right that he/she can see the menu of "Automated Action" from Setting > Technical > Automated Action as following:

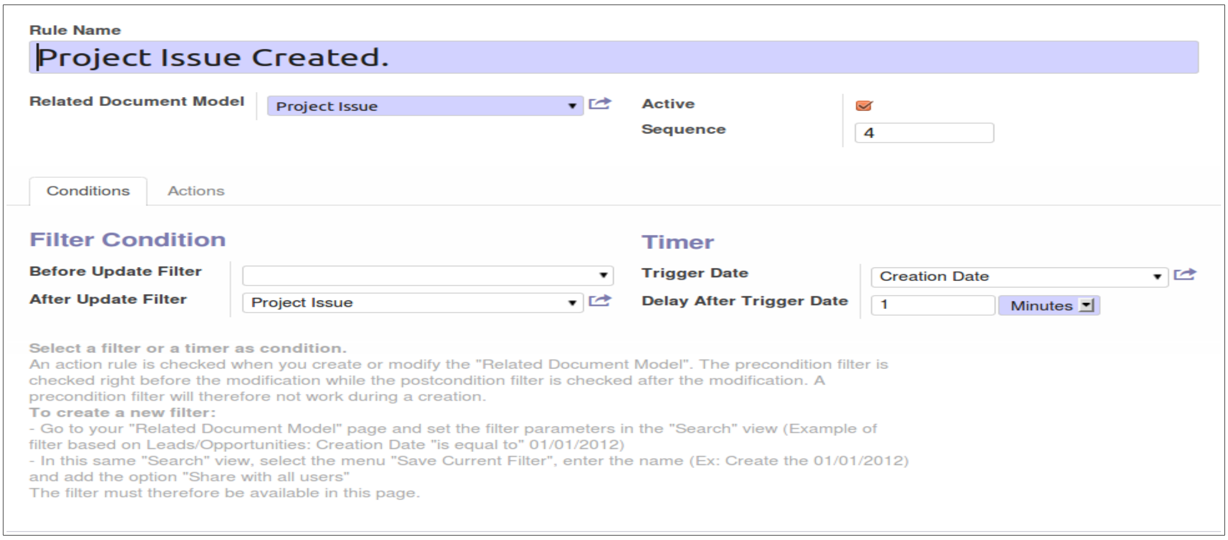
- Now user also configure the the scheduler named "Check Action Rules" via Setting > Technical > Scheduler.



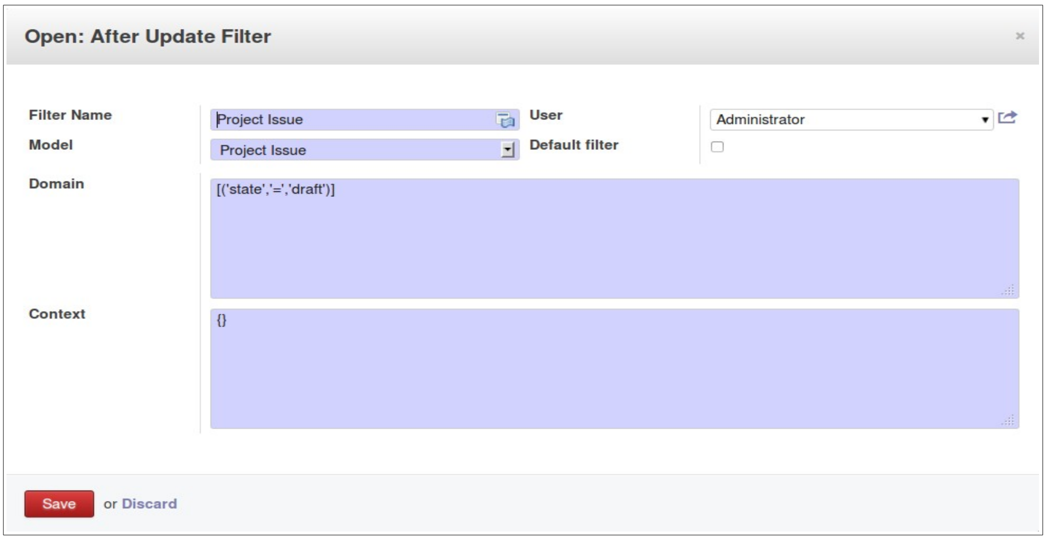
  - In this scheduler user can add the "Next Execution Date" after which he/she want to call "Automated Action Rules".
  - User can mention Interval unit for after which interval he/she want to call this scheduler.
  - "Number of Calls" is for How many times the scheduler is called, the negative number indicates no limit.
  - "Repeat Missed" is specify if the missed occurrencies should be executed after server restart.

Automated Action Rule for Project Issue

- Now lets see an "Automated Action" for "**Project Issue**".
- Here first of all, we create an "Automated Action" for "Project Issue Creation", in which an auto Reminder(Email) is sent to the user(who Created the Project Issue) if any Project Issue is Created.

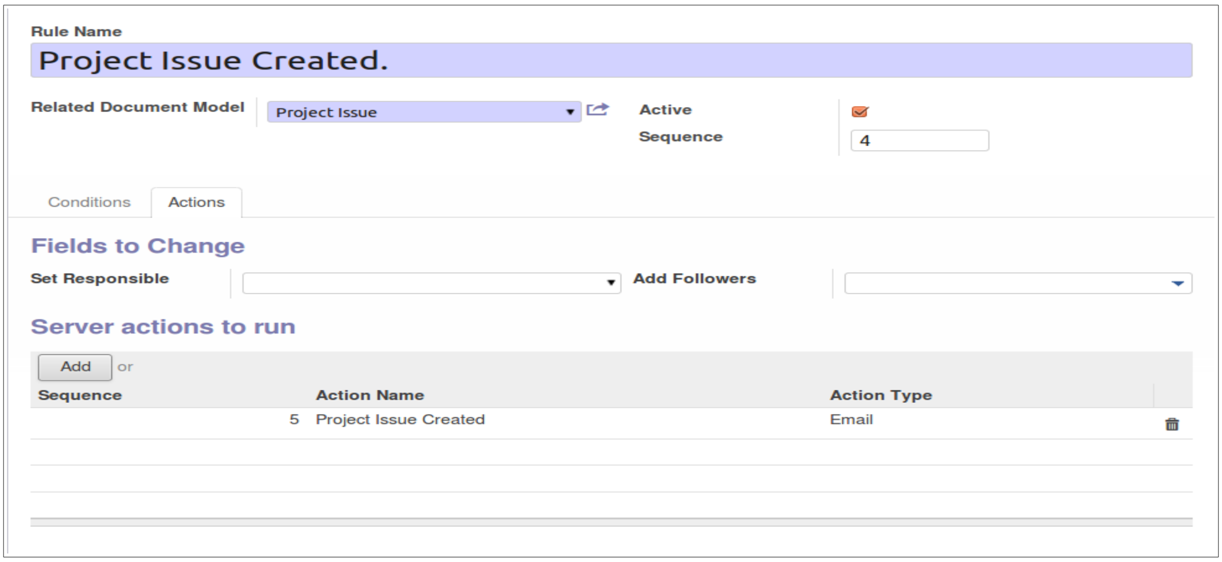


- **Field Description:**
  - **Rule Name**: Name of Rule. (User can give any name as required)
  - **Related Document Model**: Model to which the action rule is related with(Here we create an action rule for Project Issue so related document model is "Project Issue").
  - **Active**: When unchecked the Rule is hidden and will not be executed.
  - **Condition:**
    - **Before Update Filter**: Here if any filter is present, this condition must be satisfied before the update of the record.
    - **After Update Filter:** If any filter is present, this condition must be satisfied after the update of the record.

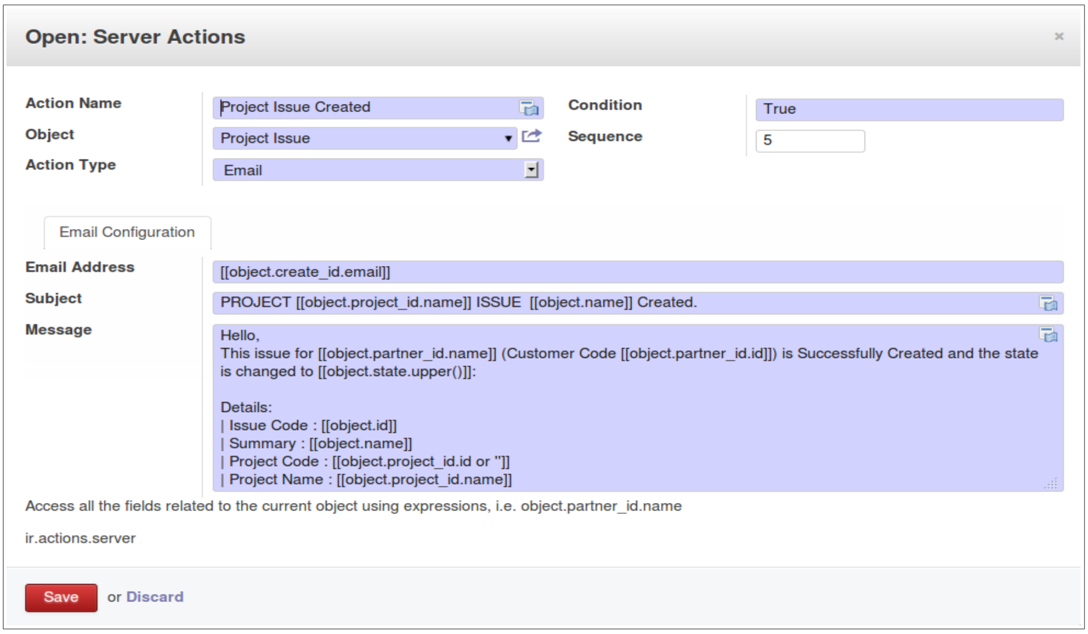


- **Trigger Date**: Date on which the rule will trigger.(Here Date or datetime fields of "Related Document Model" will be in the selection)
- **Delay After Trigger Date**: Delay after the trigger date.You can put a negative number if you need a delay before the trigger date, like sending a reminder 15 minutes before a meeting.

Automated Action Rule for Project Issue



- **Field Description:**
  - **Action:** Here Action will be defined.
    - **Set Responsible**: If user want to add responsible user for this action.
    - **Add Followers**: If user want to add Auto Followers for for perticuler Model.
    - **Server actions to run**: Here user can add multiple actions. We create a followoing action for our need.

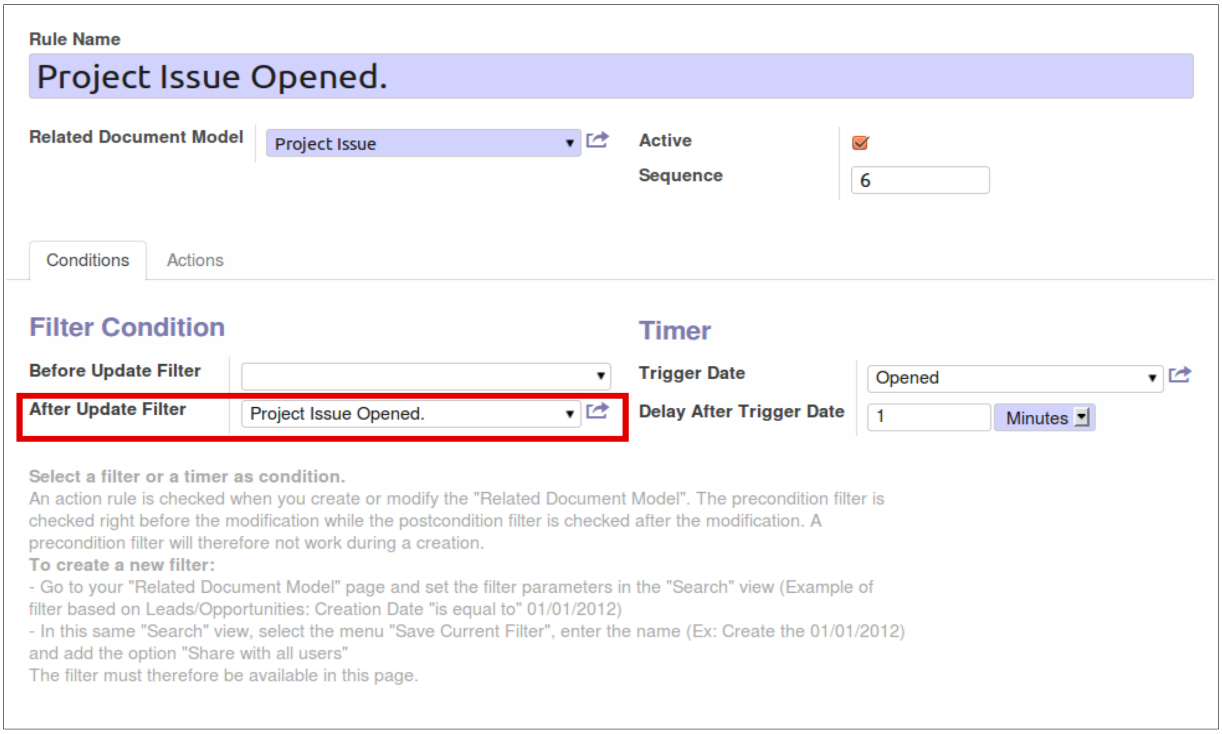


- **Action Name**: Name of Action.
  - **Condition**: Condition that will be tested before action is executed and prevent execution if it is not verified.
  - **Object**: related Model for Action.
  - **Action Type**: Which type of action do you want to executed. (Here we want email action).
  - **Email Address**: Email address of any user/ partener.
  - **Subject**: Subject of Email.
  - **Message**: Body of Email.

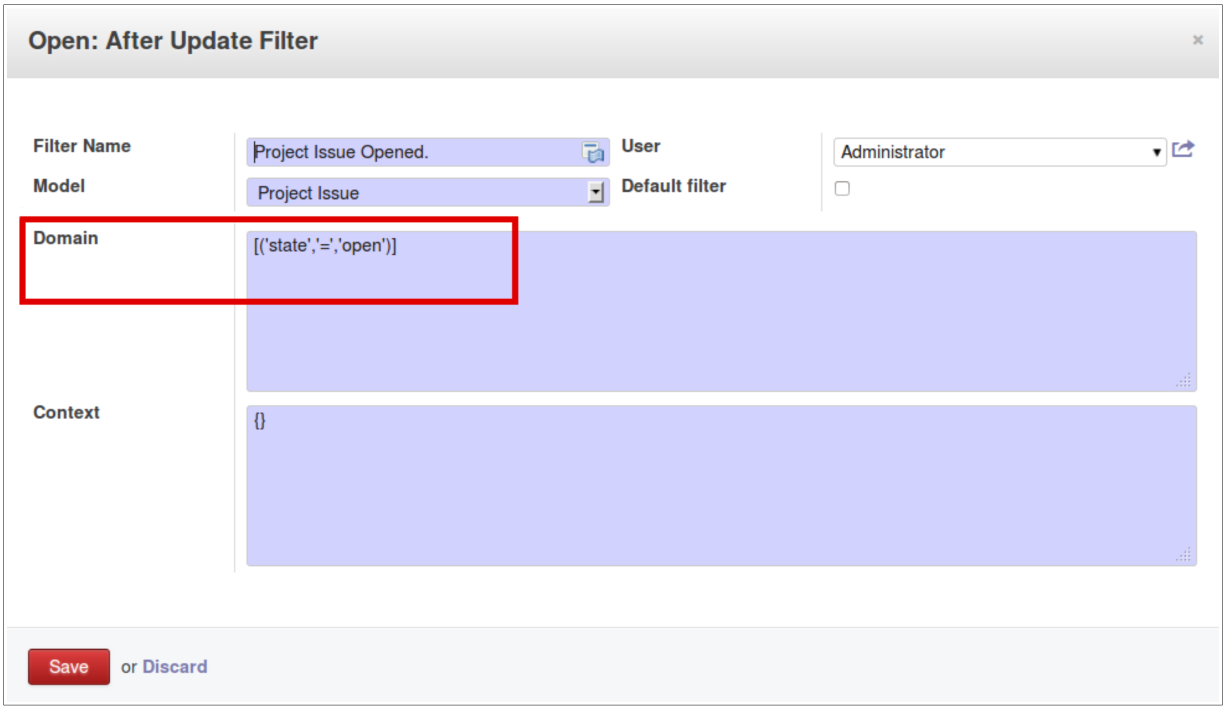
Automated Action Rule for Project Issue

- Now save the Automated Action.
- Now this action will be called automatically if any Project Issue is Created.

➢ In the same way we can create an Automated Action for Project Issue, in which an auto Reminder(Email) is sent to the user(who Created the Project Issue) if any Project Issue is changed to Opened State.

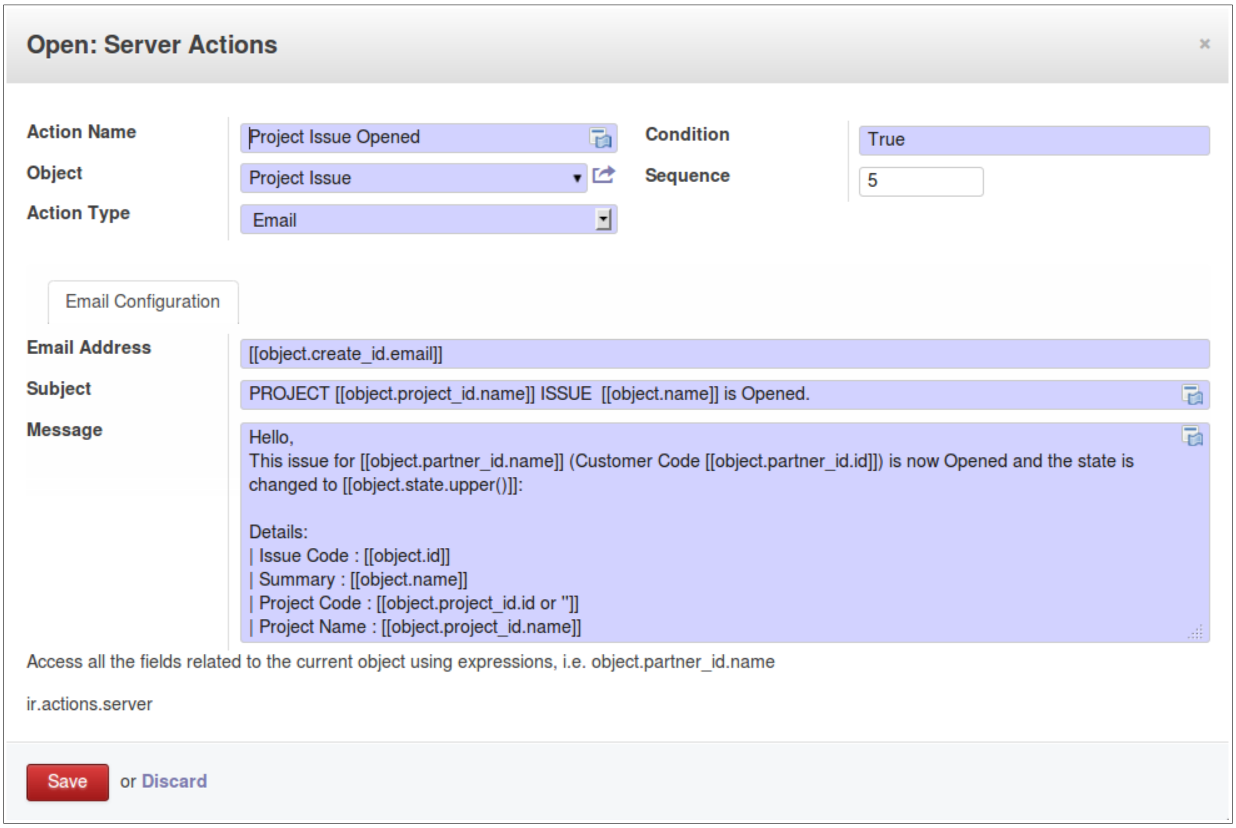


- The only Changes to do are in Filter Domain and Trigger Date as compared to Automated Action created for creation of Project Issue.

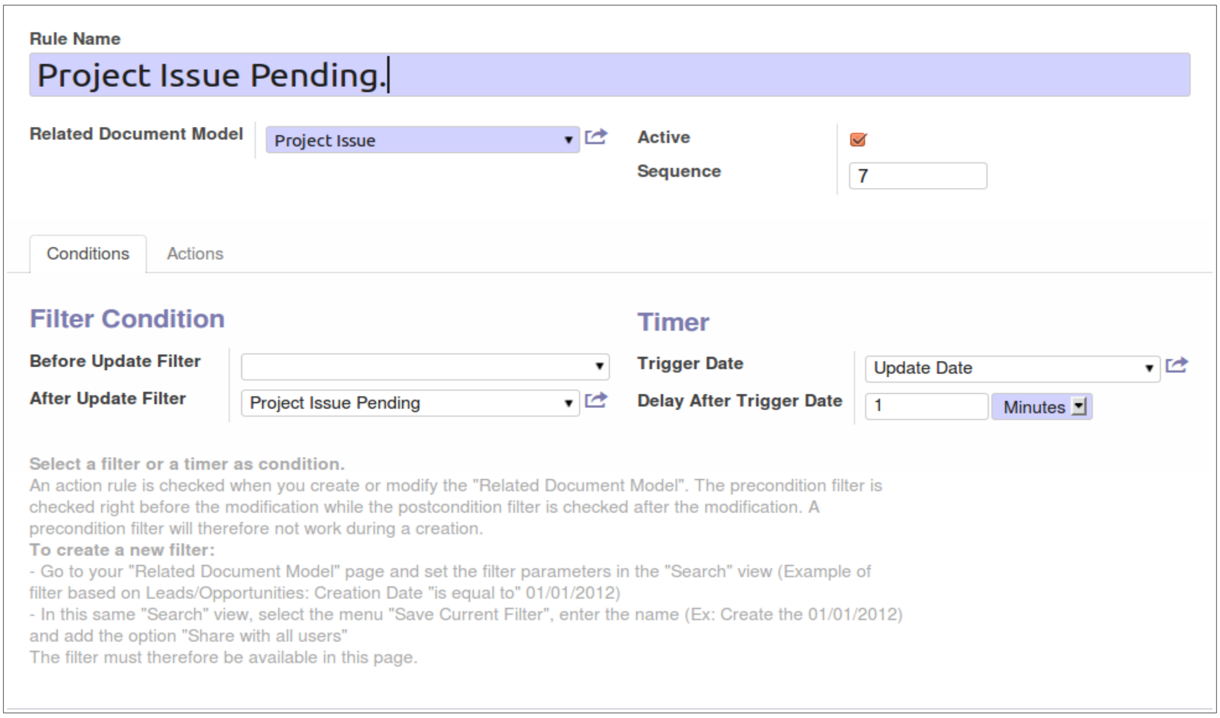


Automated Action Rule for Project Issue

- The **Server actions to run** for Project Issue open.



- In this way we can also create an “Automated Action” for Project Issue Pending, Done or Cancelled.
- For this we need to change Filter Domain, Trigger Date and Server actions to run as required as compared to Automated Action created for creation of Project Issue.



Automated Action Rule for Project Issue

- Here “After update Filter- Domain” for different states are as follwoing:
  Pending : [('state','=','pending')]
  Done : [('state','=','done')]
  Cancelled : [('state','=','cancelled')]

- Trigger Date will be same as “Update Date”.

- Server actions to run is as user required.

➢ So in this way these Actions will be called if any Project issue's state changes.