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# Odoo studio and automation

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# Odoo Studio

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**Odoo Studio** is a toolbox that allows you to add **models** or adapt **functionalities** on top of Odoo's standard behavior without coding knowledge. You can also create **custom views** and modify existing ones without having to get into the **XML code**.

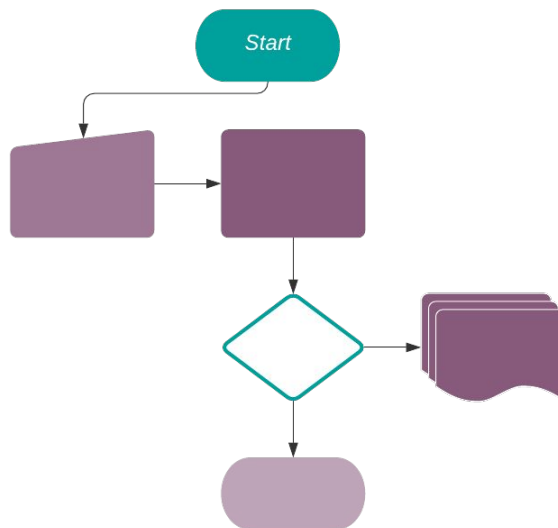
Even for experienced developers, typing out code requires time. By using Odoo Studio, you can quickly get your models up and going and focus on the crucial parts of your application. The result is a user-friendly solution that makes customizations and designing new applications easy with or without programming skills.



# Odoo Automated Action

**Automated actions** are used to trigger **actions**. They are based on conditions and happen on top of Odoo's default business logic.

Examples of automated actions: Creating a **next activity** upon a **quote's confirmation**; adding a **user** as a follower of a confirmed invoice if its total is higher than a certain amount; or preventing a **lead** from changing **stage** if a field is not filled in.



# Odoo Automated Action

Let's understand how to properly define *when* an automated action runs and *how* to create one:

The first step is to choose the **Model** on which the action is applied.

The **Trigger** field defines the event that causes the automated action to happen:

- **On Creation:** when a new record is created. Note that the record is created once saved for the first time.
- **On Update:** when the record is updated. Note that the update happens once the record is saved.
- **On Creation & Update:** on the creation and/or on the update of a record once the form is saved.
- **On Deletion:** on the removal of a record under the condition set.
- **Based on Form Modification:** when the value of the specified *Trigger* field is changed in the interface (user sees the changes before saving the record). Note that this action can only be used with the *Execute Python Code* action type.
- **Based on Timed Condition:** a delay happens after a specific date/time. Set a **Delay after trigger date** if you need a delay to happen before the **Trigger Date**. Example: to send a reminder 15min before a meeting. If the date/time is not set on the form of the model chosen, the date/time considered is the one of the creation/update of the record.

# Odoo Automated Action

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For every Trigger option, **conditions** can be applied, such as:

- ***Before Update Domain***: if designated, this condition must be satisfied before the record is updated.
- ***Apply on***: if designated, this condition must be satisfied before executing the action rule (*Action To Do*), and after the update.

# Odoo Automated Action

The **Active** option is to be turned off when the rule should be hidden and not executed.

Under **Action To Do** choose the type of server action that must be executed once records meet the *Trigger* conditions:

- **Execute Python Code:** a block of code is executed. A *Help* tab with the variables that can be used is available.
- **Create New Record:** a new record with new values is created.
- **Update a Record:** updates the record that triggered the action.
- **Execute several actions:** defines an action that triggers other server actions.
- **Send Email:** an automatic [email](#) is sent.
- **Add Followers:** followers are notified of changes in the task.
- **Create Next Activity:** creates an activity such as: *Call, Email, Reminder*.
- **Send SMS Text Message:** sends an [SMS](#).

# Q&A