# **Workflow Module**

## **Step 1:**

## Click the Workflow main menu in apps.

## **Step 2:**

## Here we can click the create button to create the workflow.

## 

## **Step 3:**

## Enter the workflow name on the field. (It’s a Character Field.)

## **Step 4:**

## After entered the workflow name we have to add the tasks in the task lists. Here we have Task Lists tab under the name field. Click the Add a line and place the tasks there for further processes.

## 

## **Fields on Task Lists**

## **1. Sequence:**

## The Sequence field is auto generate field and it’s a Integer field. It will use for show the count of the task in the task list.

## **2. Task Name:**

## The task name field is Many2one field (Selection type). Here we can select the task form Task Master.

## **Task Master**

## **Task Step 1:**

## Go to configuration in Workflow main menu and click the Tasks menu.

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## **Task Step 2:**

## Click the create button for create the task record.

## **Task Step 3:**

## Task Form:

## 1. Enter the task name on the field and fill the other field to create the task records.

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## 2. Worksheet is selection field (Many2one). It will get the value from the survey module(Odoo default module).

## 3. Category field is a selection field(List field). Here we have two type of category. One is Action and another one is status.

## 1. If we select the Action the python code field will be changing as required field (mandatory field).

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## 2. If we select the Status option in category the python field will be invisible from the form.

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## 4. Description: There we have to enter the description about the task or related notes on it. This is the text field.

## 5. Child Ticket Type: This field is selection field(Many2one). It will get the value from the Service Type master.

## 6. File Attachment: This is a Boolean field.

## 7. Sign Required: This is a Boolean field.

## 8. End Task: This is a Boolean field.

## 9. Create Task: This is a boolean field.

## 10. Create Service Request: This is a boolean field.

## 11. Create Child Ticket Creation: This is a boolean field.

## Now click the save button to save the record. Now we can get the task from here to workflow task lists. Tasks creation Completed.

## When we select the task in the task list the following fields are automatically get the values from the task master.

## **3. Description**

## **4. Category**

## **5. Worksheet**

## **6. End Task**

## **7. Attachment.**

## These are all related fields of Task Name field.

## **8. Next Tasks:**

## This is a Many2many Fields we can select multiple tasks here except the selected task which we are selected on Task Name field.

## 

## **9. Status:**

## Here we have enter the value regarding task status, because It’s a Character field.

## **Description:**

## The description tab is have only one field. It will use to note the processes details. And this is a Html field we can fill this field with lots of sentence.

## 

## **\*\*\*\*\*\*\*\*\*\* END \*\*\*\*\*\*\*\*\*\***