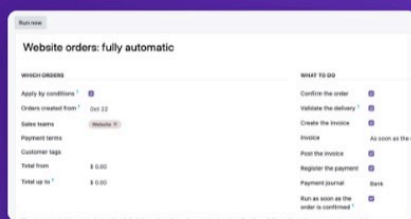


Auto Workflow

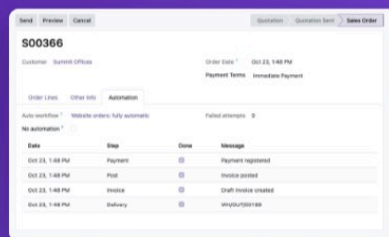
A guide to the sales auto workflow: choosing the orders and the steps, the automation log, errors, access rights and the limits.

1. Start here

In plain words: An order arrives, somebody confirms it, somebody validates the delivery, somebody creates the invoice, somebody posts it, somebody registers the payment. **Sales Auto Workflow** does these steps by itself, for the orders you choose: by sales team, payment terms, customer tags or amount. Every step is logged, and an order that cannot go on tells you why.



1. Choose the steps



2. Every step logged

Number	Order Date	Customer	Salesperson	Activities	Total Invoice Total
S00370	Oct 23, 1:00 PM	Holten Light's Trading	Sam Carter		\$ 219.00
S00372	Oct 23, 1:00 PM	Lolita Imports	Sam Carter		\$ 85.00
S00371	Oct 23, 1:00 PM	Holten Light's Trading	Sam Carter		\$ 85.00
S00370	Oct 23, 1:00 PM	Overhead Market	Sam Carter		\$ 180.00
S00369	Oct 23, 1:00 PM	Summit Office	Sam Carter		\$ 1,180.00
S00368	Oct 23, 1:00 PM	Proctor Hardware	Sam Carter		\$ 1,800.00
S00367	Oct 23, 1:00 PM	Overhead Market	Sam Carter		\$ 180.00
S00366	Oct 23, 1:00 PM	Summit Office	Sam Carter		\$ 880.00

3. Orders handled by themselves

A workflow with its steps, an order with its automation log, and the orders handled by themselves.

Tip: Start with confirm only, then add the delivery and the invoice when you trust it. Orders created before the workflow are left alone.

2. What you get

Feature	What it does
Workflows by conditions	Sales team, payment terms, customer tags and amount choose the orders. The first workflow that fits wins.
Steps	Confirm, validate the delivery, create the invoice, post it, register the payment.
Delivery	Validated only when everything is available; otherwise the order waits and is tried again.
Invoice	As soon as the order is confirmed, or when it has been delivered.
Instant or every 5 minutes	Run when the order is confirmed, or by a job every five minutes.
A log and errors	Every step on the order; the error if one failed; an activity for the salesperson after three failures.
By hand	Pick a workflow on an order, switch automation off for one, or press Run automation.
Arabic	Everything is translated and works right to left.

3. Requirements

Item	Details
Odoo	19.0 (Community or Enterprise)
Apps needed	Sales and Inventory (<code>sale_stock</code>), Invoicing (<code>account</code>)
License	OPL-1 (Odoo Proprietary License v1.0)

4. Install

- 1 Unzip the package. Inside is `taqnix_auto_workflow.zip` ; unzip it to get the folder `taqnix_auto_workflow` .
- 2 Copy the folder into one of the `addons_path` folders of your Odoo server and restart Odoo.
- 3 Log in as an administrator, activate **Developer mode**, open **Apps** and press **Update Apps List**.
- 4 Remove the "Apps" filter, search **Sales Auto Workflow** and press **Install**.

```
# or from the command line
./odoo-bin -c odoo.conf -d YOUR_DATABASE -i taqnix_auto_workflow --stop-after-init
```

5. Create a workflow

In plain words: Open **Sales** → **Configuration** → **Auto Workflows** and press **New**.

Sales Orders To Invoice Products Reporting Configuration									
New Auto Workflows ⚙		Q Search...		1-4 / 4 < >					
☐	Name	Sales teams	Payment terms	Confirm the ...	Validate the ...	Create the in...	Register the ...	Orders	Active
☐	Website orders: fully automatic	Website		☒	☒	☒	☒	4	☒
☐	Wholesale: Invoice on delivery	Wholesale	30 Days	☒	☒	☒	☐	3	☒
☐	Kiosk: confirm and invoice	Retail Kiosk		☒	☐	☒	☐	2	☒
☐	Phone orders	Phone sales		☒	☐	☒	☒	1	☒

Four workflows: website, wholesale, kiosk and phone orders.

SalesOrdersTo InvoiceProductsReportingConfiguration

New

Auto Workflows
Website orders: fully automatic ⚙️

Orders
4

1 / 1<>

Run now

Website orders: fully automatic

WHICH ORDERS

Apply by conditions ?☒

Orders created from ?Oct 22

Sales teamsWebsite X

Payment terms

Customer tags

Total from\$ 0.00

Total up to ?\$ 0.00

WHAT TO DO

Confirm the order☒

Validate the delivery ?☒

Create the invoice☒

InvoiceAs soon as the order is confirmed

Post the invoice☒

Register the payment☒

Payment journalBank

Run as soon as the order is confirmed ?☒

The steps run in this order. A step that fails is logged on the order and tried again; after three failures the salesperson gets an activity.

Website orders: confirmed, delivered, invoiced, posted and paid by themselves.

Field	Meaning
Apply by conditions	Orders that meet the conditions get the workflow by themselves. Off: it is used only when chosen on an order.
Orders created from	Older orders are left alone. The default is today.
Sales teams, payment terms, customer tags, total	The conditions. All the ones you fill must hold. At least one is needed.
Confirm the order	Confirms quotations.
Validate the delivery	Only when all the products are available.
Create / post the invoice	When: as soon as the order is confirmed, or once the delivery is done.
Register the payment	In the journal you choose, for the full amount, dated today.
Run as soon as the order is confirmed	Otherwise the job takes the order within five minutes.

Important: A workflow that confirms quotations confirms every matching quotation. Choose the conditions carefully, for example the sales team of your web shop.

6. On the order

In plain words: Each order has an **Automation** tab with its workflow, the failed attempts and the log of every step.

SalesOrdersTo InvoiceProductsReportingConfiguration

New

QuotationsS00366

Delivery1Invoices1

1 / 1<>

SendPreviewCancel

Quotation>Quotation Sent>Sales Order

Send messageLog noteActivity

1 / 1<>

S00366

CustomerSummit OfficesOrder Date?Oct 23, 1:48 PMPayment TermsImmediate Payment

Order LinesOther InfoAutomation

Auto workflow?Website orders: fully automaticFailed attempts0

No automation?☐

Date	Step	Done	Message
Oct 23, 1:48 PM	Payment	☒	Payment registered
Oct 23, 1:48 PM	Post	☒	Invoice posted
Oct 23, 1:48 PM	Invoice	☒	Draft invoice created
Oct 23, 1:48 PM	Delivery	☒	WH/OUT/00189

Today

OdooBot 1:48 PM

Invoice 2026/00021/الفات paid

An order taken from confirmation to payment.

Situation	What happens
Not everything is in stock	The order stays confirmed with its delivery waiting. Nothing is logged as an error; it is tried again after the next receipt.
A step fails	The error is logged and shown in red on the order; it is tried again. After three failures the salesperson gets an activity.
Run automation	Starts again, for example after you fixed the cause.
No automation	Tick it to handle one order by hand.

SalesOrdersTo InvoiceProductsReportingConfiguration

New

Quotations
S00373

Delivery
1

Invoices
1

1 / 1

SendPreviewCancelRun automation

Quotation>Quotation Sent>Sales Order

Send messageLog noteActivity

Automation: pay: You cannot post an entry in an archived journal (Old card terminal)

S00373

Customer Harbor Lights TradingOrder Date ? Oct 23, 1:48 PMPayment Terms Immediate Payment

Order LinesOther InfoAutomation

Auto workflow ? Phone ordersFailed attempts 1

No automation ? ☐

Date	Step	D...	Message
Oct 23, 1:48 PM	Payment	☐	You cannot post an entry in an archived journal (Old card terminal)
Oct 23, 1:48 PM	Post	☒	Invoice posted
Oct 23, 1:48 PM	Invoice	☒	Draft invoice created
Oct 23, 1:48 PM	Confirm	☒	

The conversation is empty.

A payment that failed because the journal was archived.

7. The automation log

In plain words: Sales → Reporting → Automation Log lists every step of every order, with the failures in red.

Sales Orders To Invoice Products Reporting Configuration						4 My Company	
Automation Log						1-78 / 78	
Date	Order	Workflow	Step	Done	Message		
Oct 23, 1:48 PM	S00373	Phone orders	Payment		You cannot post an entry in an archived journal (Old card terminal)		
Oct 23, 1:48 PM	S00373	Phone orders	Post		Invoice posted		
Oct 23, 1:48 PM	S00373	Phone orders	Invoice		Draft invoice created		
Oct 23, 1:48 PM	S00373	Phone orders	Confirm				
Oct 23, 1:48 PM	S00372	Kiosk: confirm and invoice	Invoice		Draft invoice created		
Oct 23, 1:48 PM	S00372	Kiosk: confirm and invoice	Confirm				
Oct 23, 1:48 PM	S00371	Kiosk: confirm and invoice	Invoice		Draft invoice created		
Oct 23, 1:48 PM	S00371	Kiosk: confirm and invoice	Confirm				
Oct 23, 1:48 PM	S00369	Wholesale: invoice on delivery	Post		Invoice posted		
Oct 23, 1:48 PM	S00369	Wholesale: invoice on delivery	Invoice		Draft invoice created		
Oct 23, 1:48 PM	S00369	Wholesale: invoice on delivery	Delivery		WH/OUT/00192		
Oct 23, 1:48 PM	S00368	Wholesale: invoice on delivery	Post		Invoice posted		
Oct 23, 1:48 PM	S00368	Wholesale: invoice on delivery	Invoice		Draft invoice created		
Oct 23, 1:48 PM	S00368	Wholesale: invoice on delivery	Delivery		WH/OUT/00191		
Oct 23, 1:48 PM	S00366	Website orders: fully automatic	Payment		Payment registered		
Oct 23, 1:48 PM	S00366	Website orders: fully automatic	Post		Invoice posted		
Oct 23, 1:48 PM	S00366	Website orders: fully automatic	Invoice		Draft invoice created		
Oct 23, 1:48 PM	S00366	Website orders: fully automatic	Delivery		WH/OUT/00189		
Oct 23, 1:48 PM	S00365	Website orders: fully automatic	Payment		Payment registered		

Every step, with its result.

Sales Orders To Invoice Products Reporting Configuration						4 My Company	
New Sales Orders						1-32 / 32	
Number	Order Date	Customer	Salesperson	Activities	Total	Invoice Status	
S00373	Oct 23, 1:48 PM	Harbor Lights Trading	S Sam Carter		\$ 215.00	Fully Invoiced	
S00372	Oct 23, 1:48 PM	Lotus Interiors	S Sam Carter		\$ 215.00	Fully Invoiced	
S00371	Oct 23, 1:48 PM	Harbor Lights Trading	S Sam Carter		\$ 98.00	Fully Invoiced	
S00370	Oct 23, 1:48 PM	Greenfield Market	S Sam Carter		\$ 588.00	To Invoice	
S00369	Oct 23, 1:48 PM	Summit Offices	S Sam Carter		\$ 2,150.00	Fully Invoiced	
S00368	Oct 23, 1:48 PM	Pioneer Hardware	S Sam Carter		\$ 1,920.00	Fully Invoiced	
S00367	Oct 23, 1:48 PM	Greenfield Market	S Sam Carter		\$ 392.00	To Invoice	
S00366	Oct 23, 1:48 PM	Summit Offices	S Sam Carter		\$ 860.00	Fully Invoiced	
S00365	Oct 23, 1:48 PM	Lotus Interiors	S Sam Carter		\$ 689.00	Fully Invoiced	
S00364	Oct 23, 1:48 PM	Harbor Lights Trading	S Sam Carter		\$ 430.00	Fully Invoiced	
S00250	Oct 23, 1:46 PM	Harbor Lights Trading	S Sam Carter		\$ 215.00	Fully Invoiced	
S00249	Oct 23, 1:46 PM	Lotus Interiors	S Sam Carter		\$ 215.00	Fully Invoiced	
S00248	Oct 23, 1:46 PM	Harbor Lights Trading	S Sam Carter		\$ 98.00	Fully Invoiced	
S00247	Oct 23, 1:46 PM	Greenfield Market	S Sam Carter		\$ 588.00	To Invoice	
S00246	Oct 23, 1:46 PM	Summit Offices	S Sam Carter		\$ 2,150.00	Fully Invoiced	
S00245	Oct 23, 1:46 PM	Pioneer Hardware	S Sam Carter		\$ 1,920.00	Fully Invoiced	
S00244	Oct 23, 1:46 PM	Greenfield Market	S Sam Carter		\$ 392.00	To Invoice	
S00243	Oct 23, 1:46 PM	Summit Offices	S Sam Carter		\$ 860.00	Fully Invoiced	

Orders that went through by themselves.

8. Who can do what

Who	Can
Salespeople	See the workflow and log of their orders and press Run automation.
Sales managers	Create and edit workflows, see the whole log.

9. Arabic and right to left

My Company									
المبيعات الطلبات بانتظار الفوترة المنتجات إعداد التقارير التهيئة									
4 / 1-4									
جديد سبر العمل الآلي									
	الاسم	فرق المبيعات	شروط الدفع	تأكيد الأمر	اعتماد التسليم	إنشاء الفاتورة	تسجيل الدفع	الأوامر	نشط
	Website orders: fully automatic	Website		✓	✓	✓	✓	4	✓
	Wholesale: invoice on delivery	Wholesale	30 يوما	✓	✓	✓		3	✓
	Kiosk: confirm and invoice	Retail Kiosk		✓		✓		2	✓
	Phone orders	Phone sales		✓		✓	✓	1	✓

The workflows in an Arabic interface.

10. Limits

Limit	Detail
Full delivery only	A delivery is validated when everything is available; partial deliveries and backorders are not created.
Full payment	The payment is the whole invoice, in the journal you choose, dated today. It does not take a card or a payment provider.
Invoices by order	The invoice follows the product's invoicing policy (on order or on delivery).
Batches	The job handles up to 50 orders every five minutes.
Rules of other modules	A credit limit or an approval module that refuses the confirmation shows as a failed step.

11. For developers

In plain words: Skip this chapter if you only use the module.

Item	Details
Models	<code>taqnix.sale.workflow</code> and <code>taqnix.sale.workflow.log</code> ; <code>sale.order.tx_workflow_id</code> .
Methods	<code>_workflow_for(order)</code> , <code>_process_order(order)</code> , <code>_run(order)</code> .

```
workflow = env['taqnix.sale.workflow'].create({
    'name': 'Web orders', 'team_ids': [(6, 0, team.ids)], 'auto_confirm': True,
    'auto_invoice': True, 'auto_post': True,
})
env['taqnix.sale.workflow']._process_order(order)
```

12. Troubleshooting

Problem	What to do
Nothing happens to an order	Check the workflow is active, the order was created after Orders created from, the conditions fit and Apply by conditions is on. Or choose the workflow on the order.
The delivery is not validated	The stock is not complete yet. It is tried again every five minutes.
A red error on the order	Read the log, fix the cause (a journal, an access right, a stock rule) and press Run automation.
Orders are handled twice	They are not: a finished order is marked and never processed again.

13. Updating and removing

Replace the folder with the new version, restart Odoo and run `-u taqnix_auto_workflow` .
Workflows and logs are kept.

14. Support

Installation help and bug fixes are included for 6 months, with lifetime updates. Contact us through the marketplace page where you bought the module or write to **support@taqnix.com** with your Odoo version and a screenshot.

Changelog

1.0.0 – Initial release

- Workflows by sales team, payment terms, customer tags and amount
- Automatic confirm, delivery validation (when complete), invoice creation and posting, payment registration
- Instant or every five minutes; Run automation and No automation on the order
- A log of every step, errors shown on the order, an activity after three failures
- Arabic translation, automated tests