

03

Document Workflows

Odoo 19 Enterprise · Documents

Workflows route documents through a review and approval process automatically.

1 Create a workflow

Documents · Configuration · Workflows · NEW

A workflow defines automatic actions triggered when a document is tagged or moved. Example: when a document tagged "Contract" is uploaded to the Sales workspace, automatically create a "Review" activity assigned to the legal team.

Workflow Fields	
Name *	Workflow name e.g. "Contract Review Process".
Trigger *	What starts the workflow: tag added, workspace changed, or document uploaded.
Condition	Additional filter e.g. only trigger for PDF files above a certain size.
Action *	What happens: create activity, move to workspace, send email, set tag, archive.